



4: Managing Growth

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4 Managing Growth

4.1 Forecasting Growth

Community Facilities infrastructure is essential for growing communities. Planning incorporates trends to date, and relies on projections and forecasts, informed by historic data.

The Selwyn District is one of the fastest growing districts in New Zealand. This has largely occurred from internal migration following the Christchurch earthquakes in 2010-11 and has continued. This ongoing experience of such rapid development and urbanisation, projecting growth, including demographics factors, changes to demand and new development, is key to long term planning of infrastructure.

Changes to demographics and an urbanisation can drive shifts in level of service expectation. Increasing demand for services means an increase in the scope and need for additional infrastructure. It is possible to have demand managed with existing system capacity or through the use of non-asset solutions, however infrastructure to meet this demand is likely to require planning and funding. This will require population and employment projections for the medium (10 year) and long term.

Growth and development also drives Council's asset holding. New assets and increased capacity within systems is required as our district and communities grow. Council's asset portfolio increases as private development occurs and infrastructure assets are vested. Council then becomes responsible for the maintenance, operations and eventual renewal of an increasing asset portfolio.

This section provides details of growth forecasts and demand drivers, which affect the provision, management, and utilisation of Community Facility assets.

4.1.1 Growth Modelling

The demand for services, including the level of service, will change over time in response to a wide range of influences, including:

- Population growth and increase in household numbers
- Population demographic changes
- UDS and RPS settlement patterns
- Increasing urbanisation of townships
- Economic conditions and business activity in the district
- Trends in visitor numbers to or those passing through the district
- Changes in recreation and leisure trends
- Changes in social trends
- Changes to legislation
- Advances in technology
- Provision of assets and services by other agencies
- Trends in environmental protection
- Trends in cultural and heritage preservation.

Key insights into some of these factors are discussed in detail in this section. For a full insight into the current and projected state of Selwyn District, please refer to the Selwyn District Long-Term Plan 2024-34 "Growth & Demand Report".

Selwyn District Council have adopted a conservative stance, reflecting historic growth exceeding "Medium Projections". Growth modelling for the purposes of planning adopts a 'High Projection' due to the unique

position of the district so as not to underestimate future growth. It is likely that demand in the short and medium term cannot be expected to continuously reach the high population projection. As a conservative approach, this report will use the 'High Projection' of the SCGM which assumes high fertility, low mortality, and high migration.

4.2 District Growth and Trends

4.2.1 Growth Summary

Looking ahead, projections indicate a continuous upward trajectory for the district's population. The estimate is set to reach 109,664 by 2034, representing an addition of 43,696 residents in the next 10 years. By 2054, the population is expected to reach 153,360, with a substantial increase of 74,060 residents.

This growth will also impact the age demographics, with the 65 and over population expected to rise to 17.8% in 2034 and further to 24.2% by 2054. The district's demographics, characterised by a blend of youth and a growing senior population, reflect a dynamic and evolving community.

Economic projections paint a positive picture, with employment expected to continue its upward trajectory. The estimate anticipates an increase from approximately 25,524 jobs in 2022 to around 34,838 jobs by 2034, further escalating to 49,400 jobs by 2054. These projections underscore the district's resilience, economic vitality, and potential for sustained growth in the coming years.

The following summarises key changes to population, household and dwelling numbers.



Figure 4-1: Growth Projections Summary 2024-2054. Selwyn District Growth and Demand Report 2023/2024

4.2.2 Population (District and Community)

Population

Over the last two decades, the Selwyn District has experienced rapid growth in population from a population around 27,600 in 2000 to 79,300 in 2022, an increase of 51,700 people. The population in the district has grown at 4.9% per annum and in 2022, the Selwyn District was the fastest growing territorial authority in New Zealand.

Selwyn District Council is a high-growth local authority which means that the population of the Selwyn District is expected to grow at or above the national population growth rate according to the projections of Statistics New Zealand (Stats NZ).

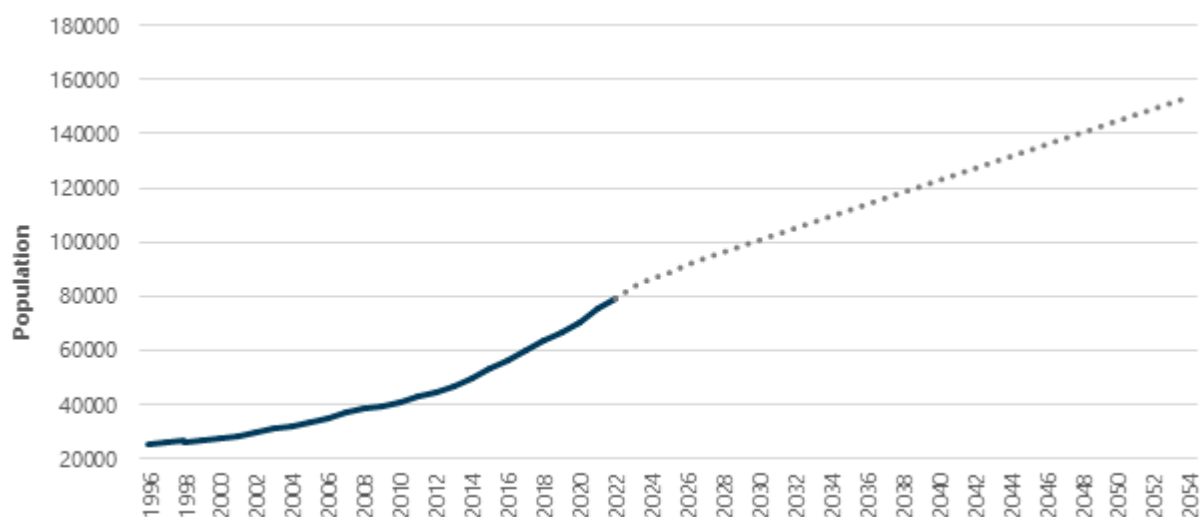


Figure 4-2: Selwyn District Population Estimates and Projections. Selwyn District Growth and Demand Report 2023/2024

The updated projections which use the Stats NZ 2022 base year have Rolleston achieving the status of city around 2050¹. This means that Rolleston by 2050 would be comparable to present day small cities of Rotorua, Nelson, Invercargill, Whangārei, Whanganui and Hastings. Rolleston is projected to receive around 38% of the Selwyn District's total population between 2022-2034.

Strong growth is projected for all of the townships in the Greater Christchurch portion of the district. Lincoln is projected to grow a population of just over 20,000 by 2054 which is comparable to Rolleston in 2019. Lincoln is projected to receive around 15.8% of the Selwyn District's total population between 2022-2034. Prebbleton is projected to grow to a population of 8,525 which is comparable to present day Lincoln. Prebbleton is projected to receive around 4.7% of the Selwyn District's total population between 2022-2034. West Melton and Darfield are projected to each receive around 4.6% of the Selwyn District's total population between 2022-2034.

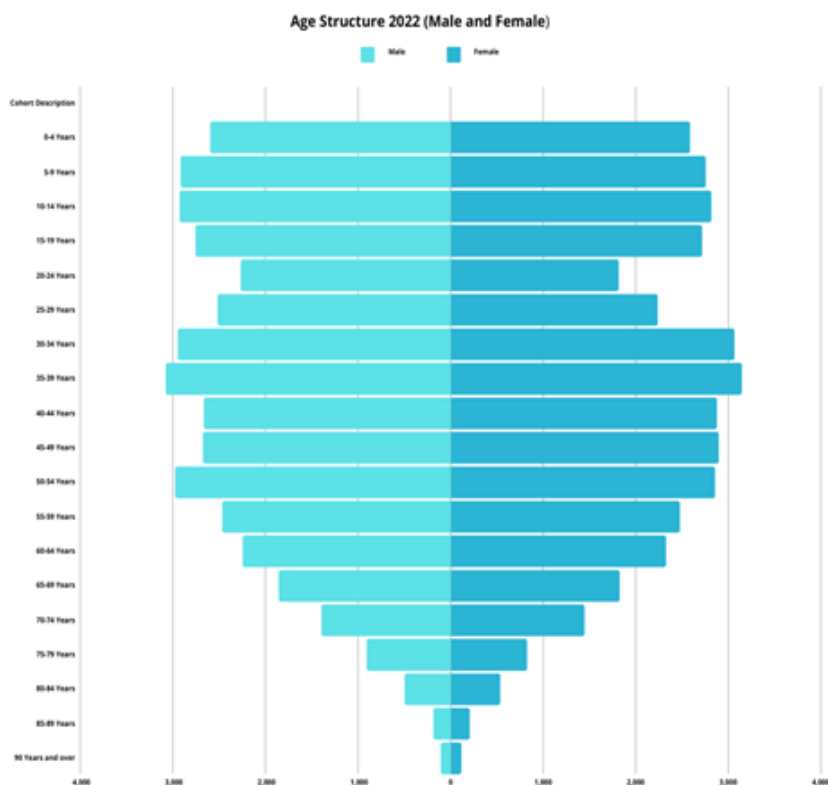
Demographics – Age Profile

The primary cause of Selwyn District's population growth is net migration comprised of migrants that are heavily located at the parental and child ages, indicating the inward movement of families. The district has also continued to experience strong natural increase which has been supplemented by its high net migration gains and relatively youthful migrant age profile.

The population of the Selwyn District has a much younger age structure than many other territorial authorities, with a large percentage of the population between 30-40 years old, as well as under 14. Presently the Selwyn District has a median age 37.3.

¹ Schedule 3 of the Local Government Act (2002)

From the graphs below which present data on the changes in age and gender of the district's population from 2012 to 2022, showing while there has been growth across all age groups, the observed change in age structure reflects the influence of migration on population growth. The biggest increases are from the 30-34 and 35-39-years old age groups. Most male and female age groups have increased by roughly 1000 people. An increase of the 65+ age group can also be seen who currently make up 12.4% of the population.



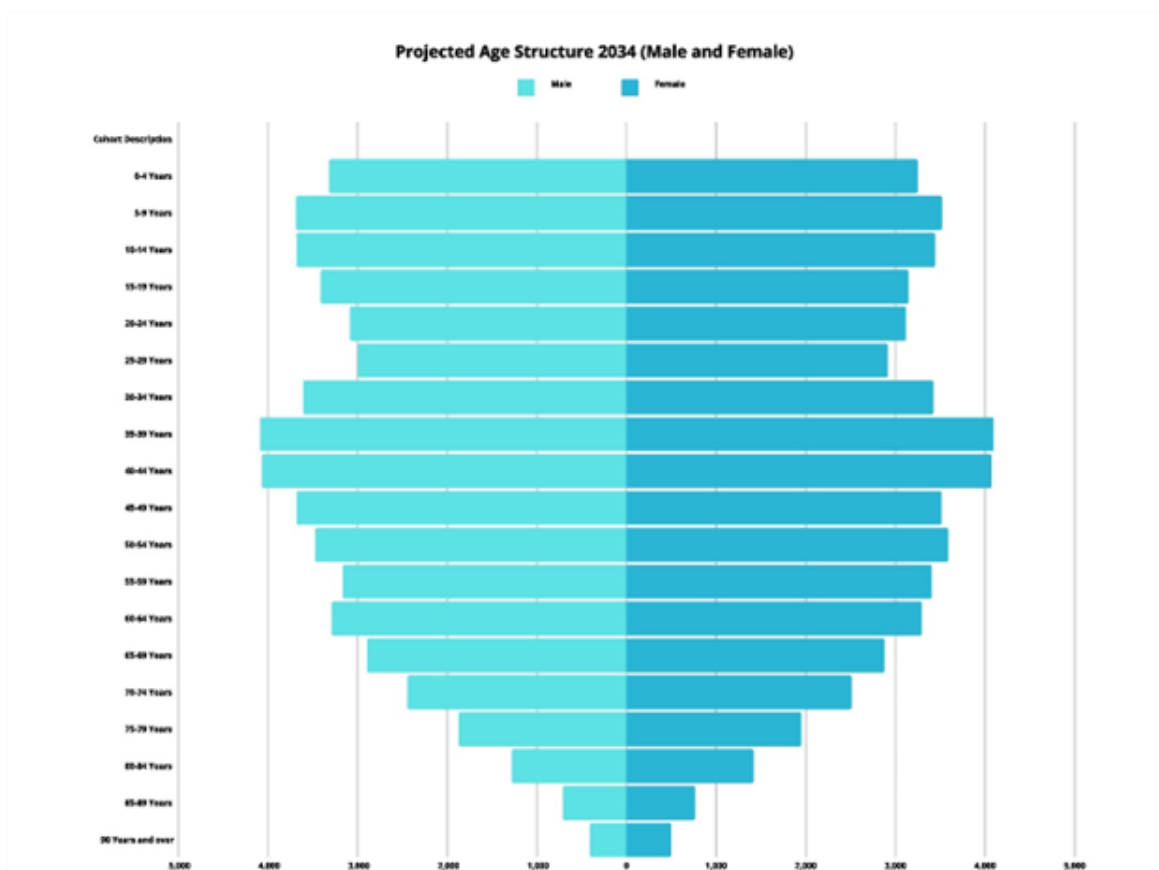


Figure 4-3: Projected Age Structure (2022 and Projected 2034). Selwyn District Growth and Demand Report 2023/2024

There are diverse age structures across Selwyn District, with considerable variation in the demographic make-up of areas. These distributional differences are important for growth planning, not just to compare the population age structures of each area, but also to appropriately locate future services.

The area of Burnham Camp has a median age of 26.1, which is to be expected due to military and associated civilian personnel that live and work at the camp. Aside from Burnham, the next youngest areas which consist of several SA2s are Rolleston with a median age of 35.38 and Lincoln at 35.85. Craigieburn has the oldest median at 48.5 and is ageing faster than other areas than other areas in the district. Other areas of the district with an older median age are Halkett (46.9), Trents (45.9), Tai Tapu (45.9) and West Melton (43.3).

In the SA2 (Statistical Area 2's) areas of Darfield, Trents, Craigieburn and Glentunnel 18-20% of the total population is aged 65+ (June 2022). An area with more than 20% of the population aged 65+ is said to be experiencing 'hyper-ageing'.

Not including the Izone SA2 area, over 24% of the Rolleston is aged 14 or younger. In the SA2 areas of Rolleston Southeast and Rolleston Northwest over a quarter of the population is aged 14 or younger. West Melton has 23% of their population aged under 14. Burnham has the lowest proportion of its population aged under 14 at (13.91%) followed by Craigieburn (15%).

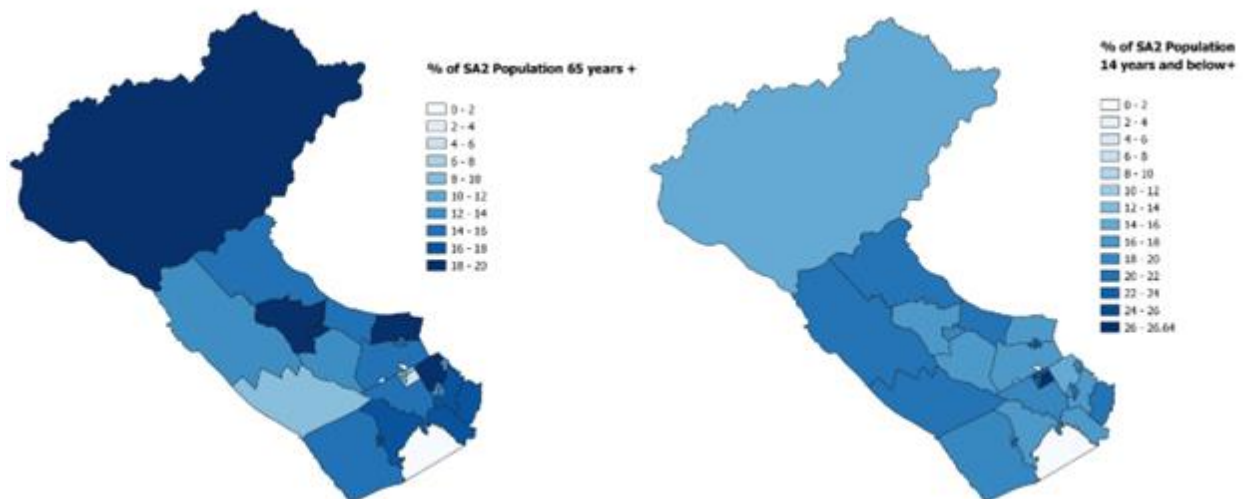
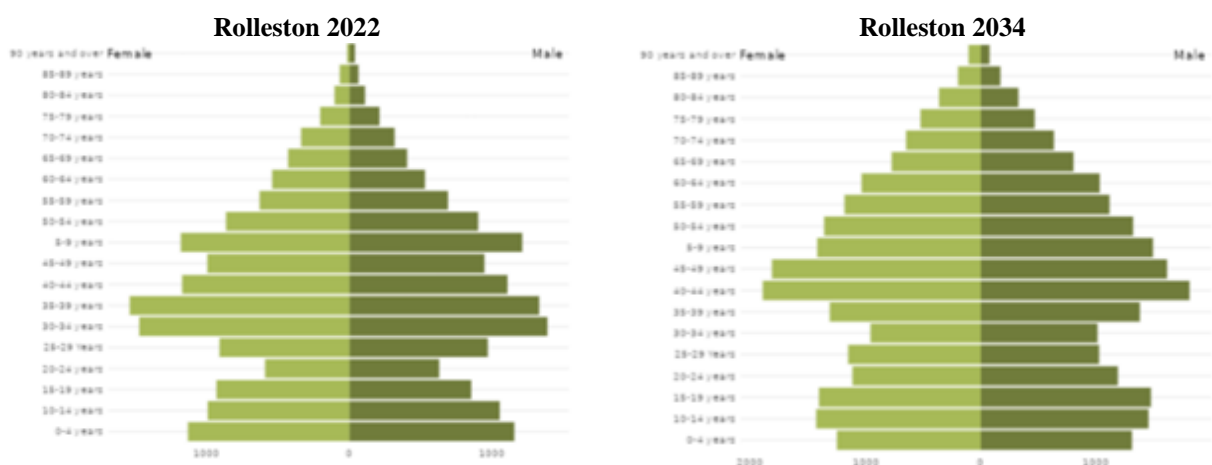
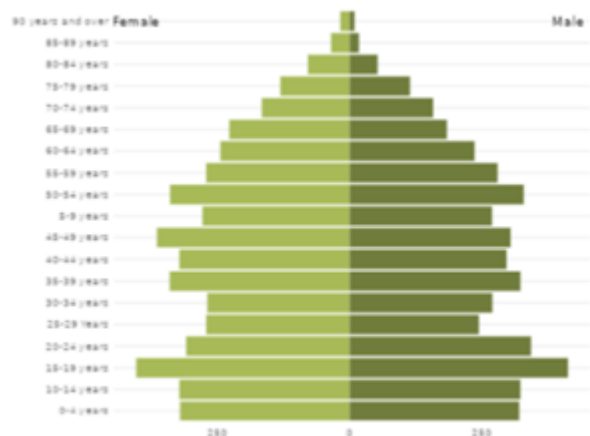


Figure 4-4: Age distribution 65+ and >14 years. Selwyn District Growth and Demand Report 2023/2024

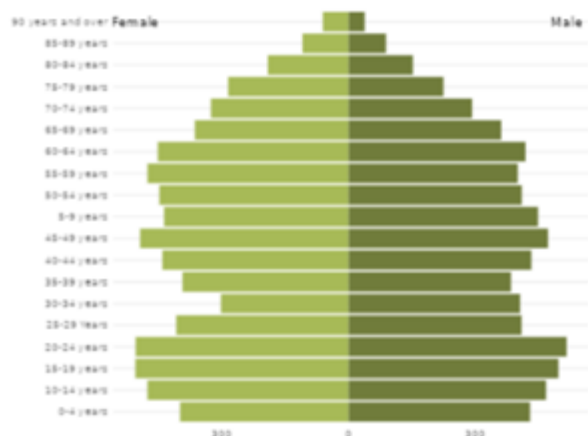
This variation can be viewed at a major township level (defined by Stats NZ as SA2's which largely reflect township boundaries). The figures below detail the 2022 township age demographics.



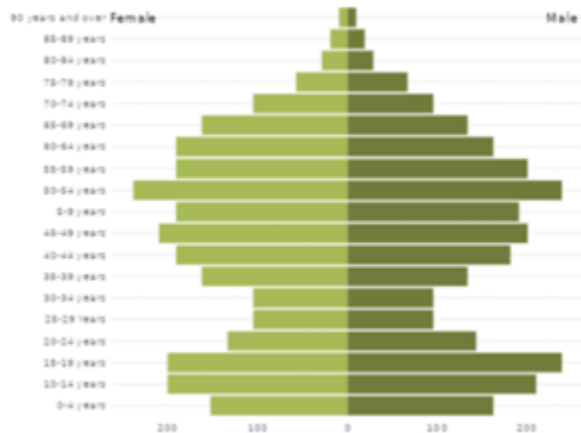
Lincoln 2022



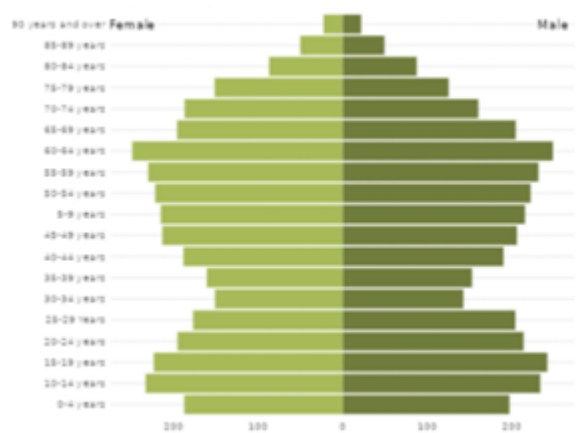
Lincoln 2034



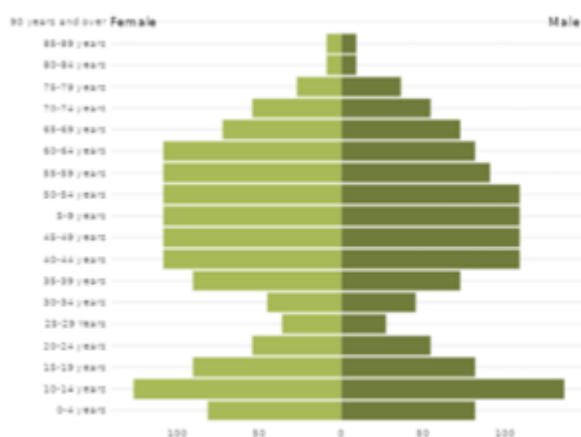
Prebbleton 2022



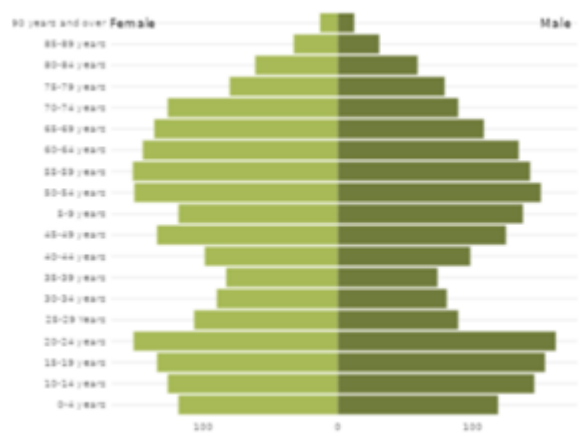
Prebbleton 2034



West Melton 2022



West Melton 2034



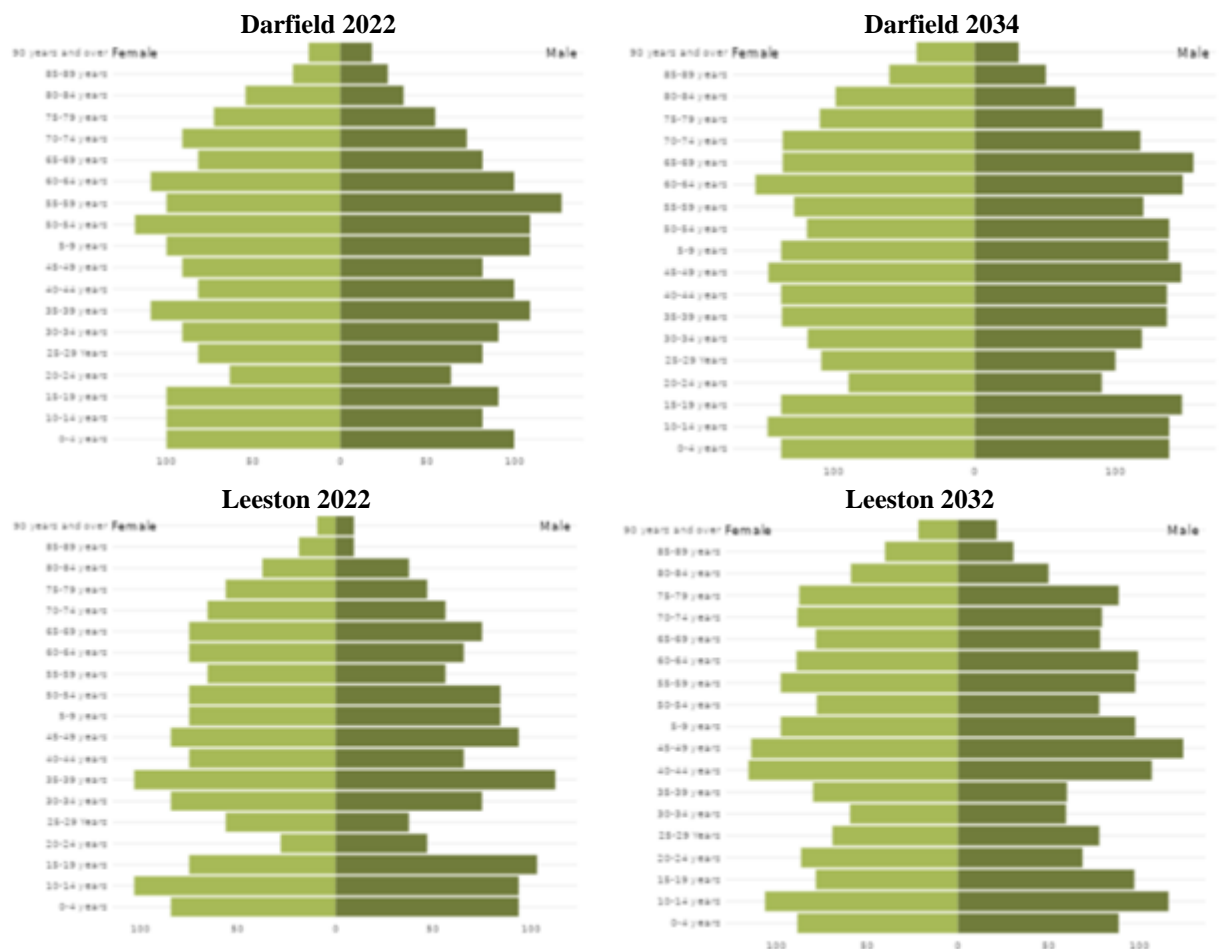


Figure 4-5: Age distributions across Major Townships. Selwyn District Growth and Demand Report 2023/2024

Although the district is structurally young, the population is aging due to several factors such as improvements in life expectancy and declining fertility rates, which increases elderly numbers within the population. Selwyn's aging population is not presently caused by migration gains of older migrants but from very low to negative migration after age 70. The district is experiencing 'ageing-in-place', that is, greater percentage growth in numbers at older ages, seemingly because older people tend to remain in the district as they age, or older leavers are exactly replaced by older arrivals.

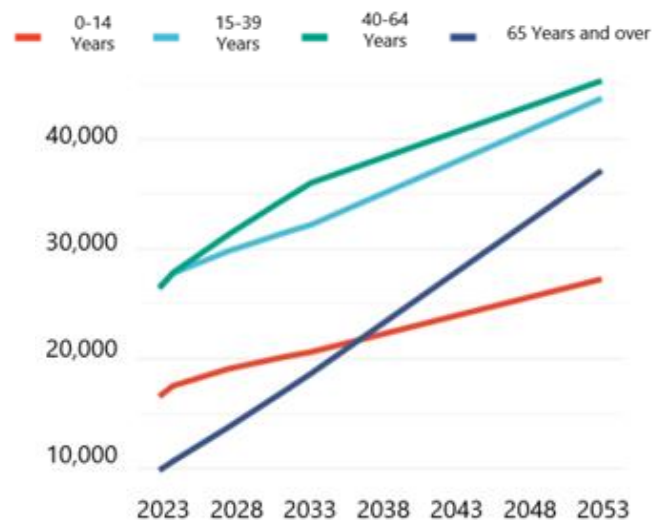


Figure 4-6: Age profile projections. Selwyn District Growth and Demand Report 2023/2024

Deaths and Mortality

Nationally, deaths are gradually increasing, despite a generally increasing life expectancy. This is due to population growth, and our ageing population - more people in older ages where most deaths occur.

Deaths have been increasing in the Selwyn District largely as a result of significant population growth, but this will increasingly be influenced by an ageing population into the future. In 2021, deaths were in line with the expected national trend of increasing deaths, while deaths in 2020 were lower as there were far fewer winter deaths than previous years. The COVID-19 pandemic has influenced deaths over the last few years, including the increased number of deaths in 2022.

The following graph (Figure 4-7) demonstrates forecasted deaths, projecting that there could be somewhere in the range of 3,400 and 3,500 in the next 10 years (2023-2033). This represents a 32-36% increase from the projected deaths for the 2021-2030 period being 2,570 deaths. Between 2023-2048, there could be between 12,800 and 12,900 deaths in the Selwyn District.

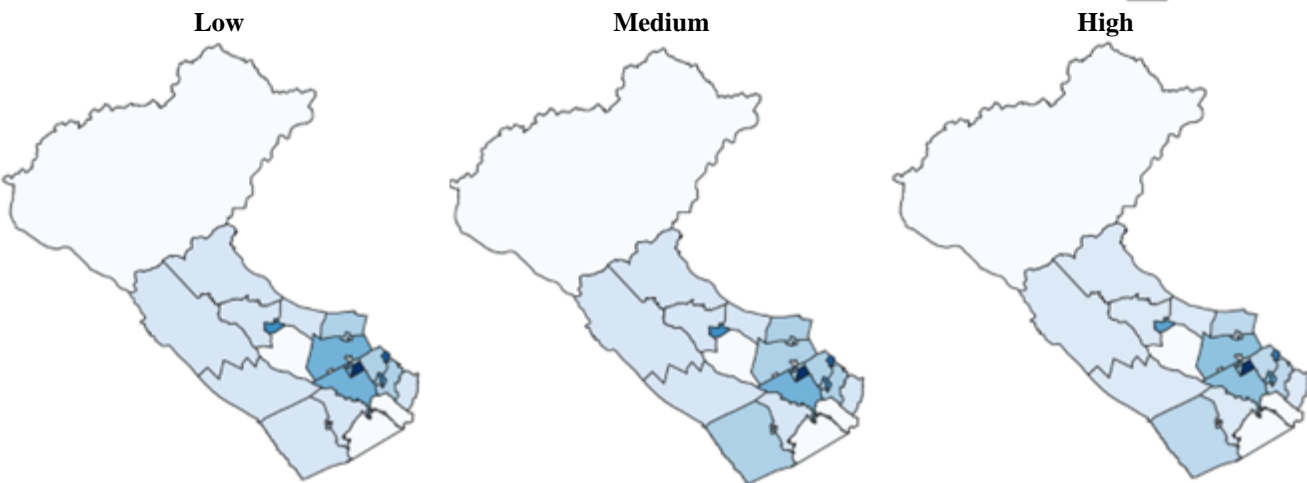
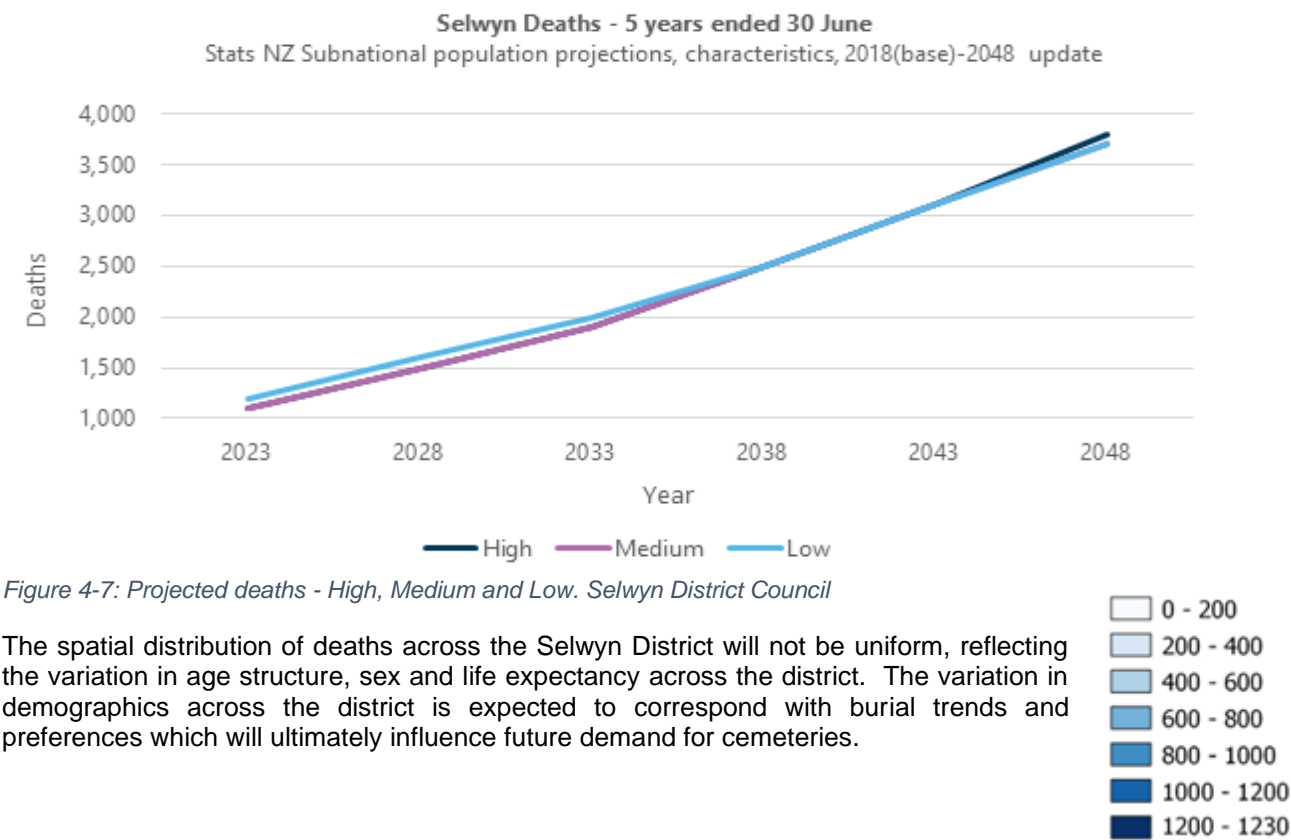


Figure 4-8: Selwyn Deaths (SA2) Subnational Population Projections 2023-2048 (ended 30 June)

Household Projections

The growth of the Selwyn District has meant there has been a rapid increase in residential development activity. The significant increase in housing demand within the district, has resulted in significant urban expansion, particularly in the larger townships.

Estimates from the SCGM (Selwyn Capacity for Growth Model) indicates that the average household size of the Selwyn District is 2.86. This average ranges throughout the district with Rolleston (3), Prebbleton (3.1), West Melton (3.1), Leeston (2.9) all being above the district average. Darfield (2.5) and Lincoln (2.6) both have an average household size below the district average. Other townships, particularly in rural areas are closer to a household size of 2.6. Townships centred on recreation, tourism or seasonal population such as Castle Hill have a much lower ratio of 1.6. Average household size has barely changed since 2006 where the average was 2.93, followed by 2.97 in 2013, and then 2.94 in 2018. The stability in household size potentially reflects the district's disproportionately youthful population and the strong presence of families.

The number of households in the Selwyn District are projected to increase from 27,703 in 2022 to 38,634 in 2034 which represents an increase of 10,931 households in the next ten years. Furthermore, the SCGM projects that the number of households in the Selwyn District by 2054 will be 55,587 which represents an increase of 27,884 households in the next thirty years. The projections indicate that there will be a doubling (over a 100% increase) in the number of households by 2054. There will be a continuation of strong growth of family households which represented 84% of total households in the Selwyn District in 2022. There is also strong growth projected for one-person households which is due to the increasing number of people at older ages. An ageing population has will result in an increase in couple-only and one-person households as a proportion of total households. Other multi-person households, which generally include unrelated people living together in a household, are increasing more slowly.

Dwelling Projections

The SCGM estimated that there are 30,559 dwellings in the Selwyn district in 2022. An increase of over 6,156 dwellings since 2018. It is projected that the number of dwellings will continue to increase to 42,617 in 2034 which represents an additional 12,058 dwellings in the next ten years. Over a thirty year period, projections indicate a doubling (over 100% increase), reaching 61,318 by 2054.

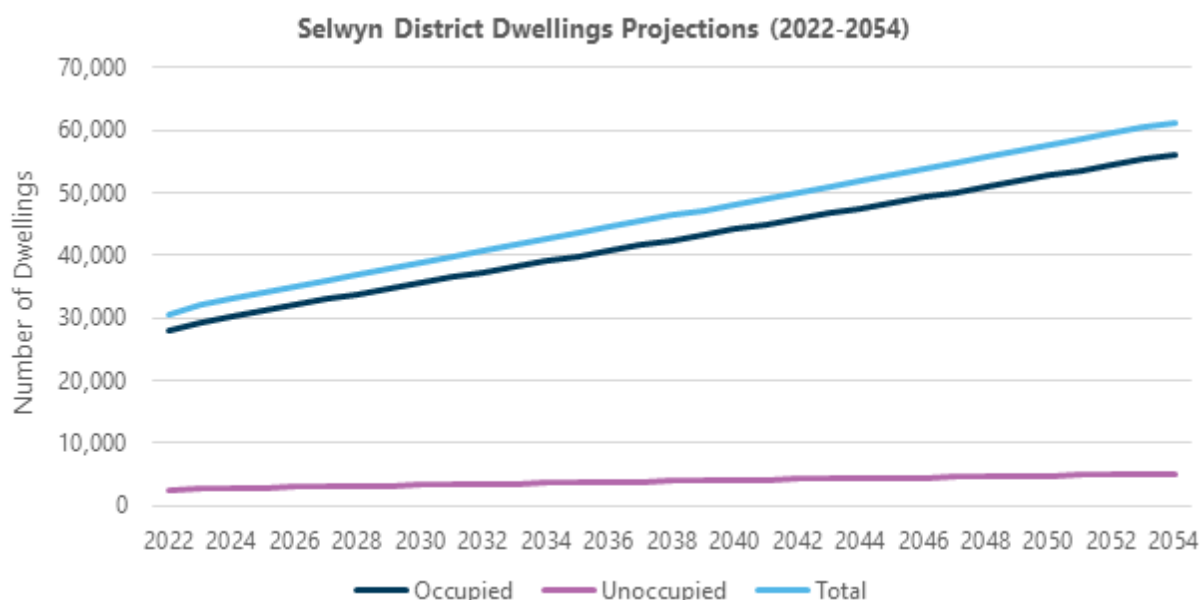


Figure 4-9: Dwelling Projections. Selwyn District Growth and Demand Report 2023/2024

In recent years there has been a shift from larger 800m² sites to smaller sites of 400-500m², particularly in Rolleston and Lincoln. Higher densities in urban areas are less land intensive, improve affordability, promote liveable towns, encourage economic development and many other co-benefits. Higher density urban areas must be coupled with the encouragement of mixed-use land use to facilitate living locally and

sustainably. Increasing density will also require a greater provision and level of service for key amenities and services.

Housing Need

Housing or more accurately ‘adequate housing’ under international law, is an international human right and everyone in the country has the right to a warm, dry, safe, secure, affordable, accessible, healthy and a decent home. In the Selwyn District’s context, it is important to discern current and future housing needs, so the provision of housing is suitable for the diverse range of housing needs and is responsive to changing housing needs. Currently, relative to other local authority areas, the Selwyn District has relatively low levels of housing need (those in need of assistance), however much like all urban areas that need is increasing.

It is important to recognise that certain groups have been disproportionately affected by poor housing outcomes and face greater housing costs. These groups include sole parents, recent migrants, Pacific peoples, Māori, low-income earners, nonowner occupiers, unemployed, disabled people and those with no qualifications. Those with the most acute housing needs and the most vulnerable are those that are homeless, in emergency and transitional housing. There are low levels of homeless, emergency and transitional housing need in the district but there is an increasing need for public housing from those that usually reside in the district.

The commonly used methodology for assessing demand for social housing is through the Housing Register, which is administered by the Ministry of Social Development. The Housing Register provides the number of applicants assessed as eligible for social housing who are ready to be matched to a suitable property. The graph below shows the number of applicants on the Housing Register in the Selwyn District as of March 2023.

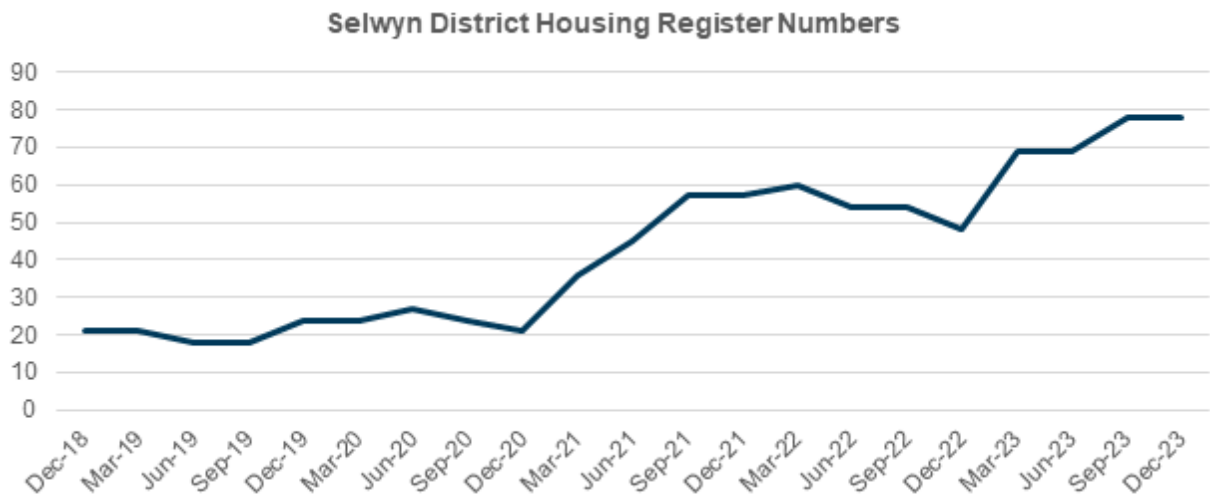


Figure 4-10: Selwyn District Housing Register Numbers. Ministry of Social Development. December 2023

From the graph above, it is noticeable that the number of applicants on the Housing Register in the Selwyn District has been increasing over the last few years, with a sharp increase between December 2020 and December 2021. This increase is to be expected given recent population growth. The Housing Register is seen as a barometer of need but is not an accurate reflection of actual numbers of residents requiring assistance. The lack of social housing in the district means those on the lowest incomes often move to Christchurch, where there is a large stock of social housing.

4.2.4 Economy

Economic Output

The Selwyn economy continues to experience strong growth and outperform the rest of the country. Over the last decade Gross Domestic Product (GDP) has grown on average of 5.3% per annum compared with an average of 3% per annum in the national economy. Infometrics provisional estimate for Selwyn's GDP for the year to March 2023 (2022 prices) is \$3,507 million.

The Selwyn Districts economy has been supported by an increasing population fuelled by internal net migration (approximately 80% of growth), due to the attraction of the high quality of life offered in the district.

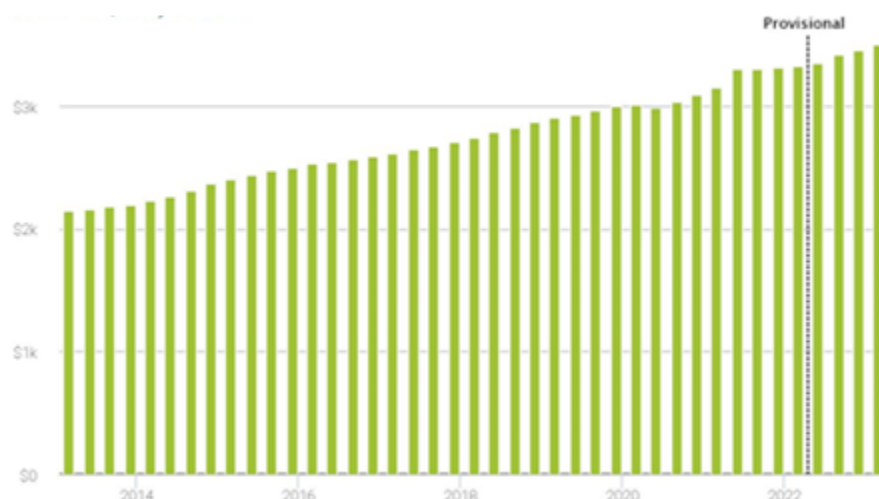


Figure 4-11: GDP Annual Level. Infometrics. 2023

The Selwyn economy is largely intertwined with the economy of Christchurch City, particularly given the role of the Selwyn District in the Greater Christchurch metropolitan area.

Even though Selwyn has an increasingly urbanising district, the rural economy continues to remain an important aspect of the Selwyn economy. The immense growth and development has meant that the Selwyn economy has undergone considerable change. The Selwyn economy has become increasingly structurally diverse, with less concentration on a few industries. Infometrics Herfindahl-Hirschman Index (HHI), a common measure of economic concentration or diversity shows that the Selwyn economy has greatly diversified since 2011 and is more industrially diverse than the national average. The higher the index, the more concentrated economic activity is on a few industries. See the graph below comparing Selwyn's HHI index compared to the national average.

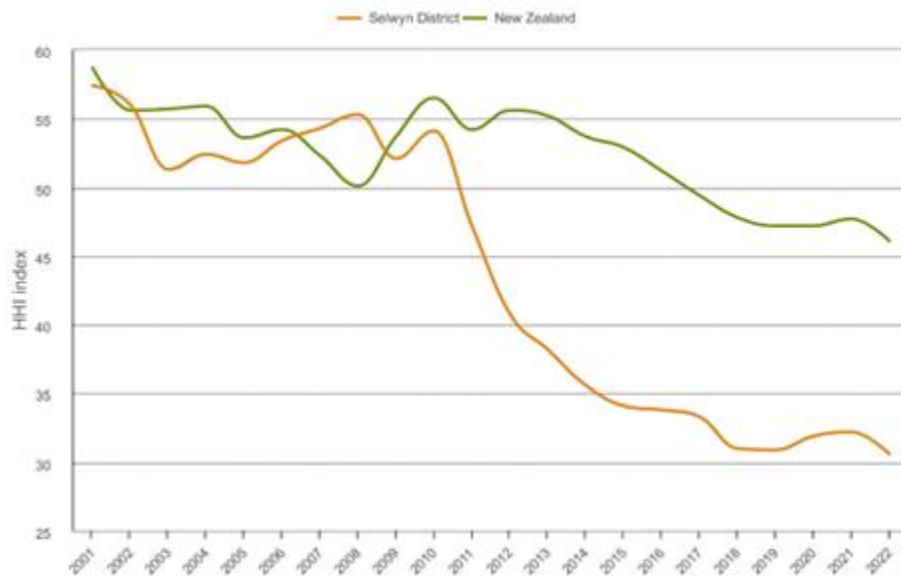


Figure 4-12: Economic Diversity. Herfindahl-Hirschman Index (HHI). Infometrics 2023.

Businesses

Selwyn has a flourishing business environment, with a high rate of business start-ups and a low business death rate. In the last 10 years, the number of businesses in the district has increased by almost 40% from 5,685 in 2012 to 7,929 in 2022. Since 2012, there has been a significant increase in demand for commercial land, leading to new commercial developments and expansions of existing centres. Industrial areas have greatly expanded due to Council's proactive approach to provide industrial land in a well-connected location which attracted businesses to relocate from Christchurch City following the Christchurch Earthquake Sequence. This industrial specialisation is a comparative advantage of the Selwyn District and has led to agglomeration benefits.

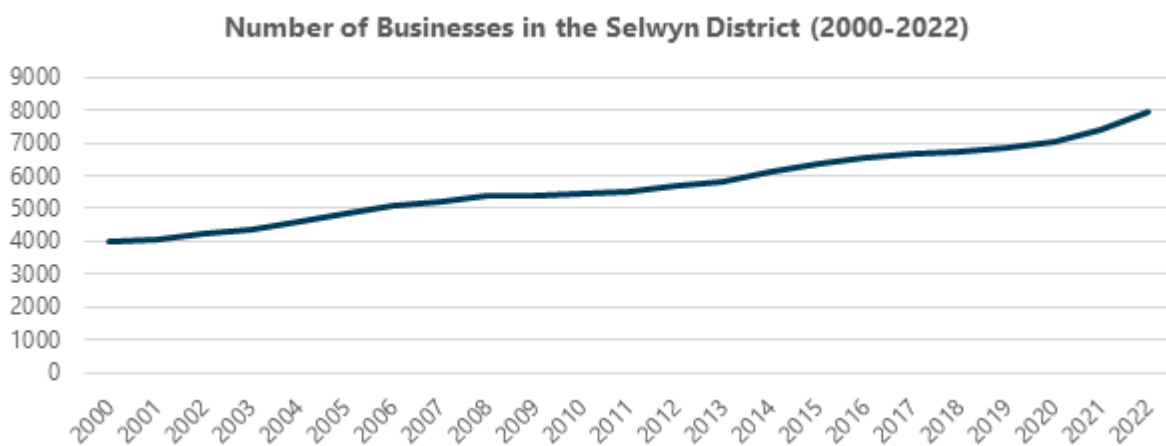


Figure 4-13: Business Numbers. Selwyn District Growth and Demand Report 2023/2024

Employment

Selwyn's population growth is fuelled by migration of a particular demographic, which has led significant gains in the working-age population. Economic growth can come from growth in inputs (such as labour and capital) or from producing more with the same inputs (productivity growth). For the Selwyn District population growth has been a strong driver of economic growth in terms of total economic output due to the increase in the labour input. In addition to GDP, economic growth has also been measured by employment or filled jobs has increased from around 16,700 jobs in 2012 to over 25,000 jobs in 2022 (around 50% increase in the last ten years).

Unemployment has remained low (2.2% in 2023) and has been consistently below the national, regional and other Greater Christchurch territorial authorities' averages.

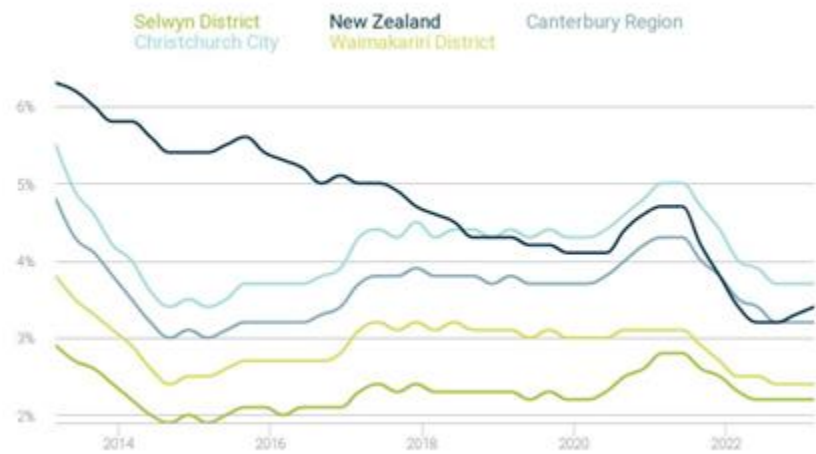


Figure 4-14: Unemployment Annual Average Rate. Infometrics 2023.

Employment is projected to increase by an additional 9,314 jobs from 25,524 jobs in 2022 to 34,838 in 2034. By 2054 employment is expected to increase to 49,400. This is an increase of 93% from 2022 employment data, effectively doubling the current filled jobs in the Selwyn District.

Rolleston is projected to remain the largest employment area in the Selwyn District over the long term with an additional 5,752 jobs over the next thirty years. In terms of a percentage increase, Darfield, Lincoln and Leeston are projected to experience the greatest employment growth over the medium term and long-term relative to the current employment numbers.

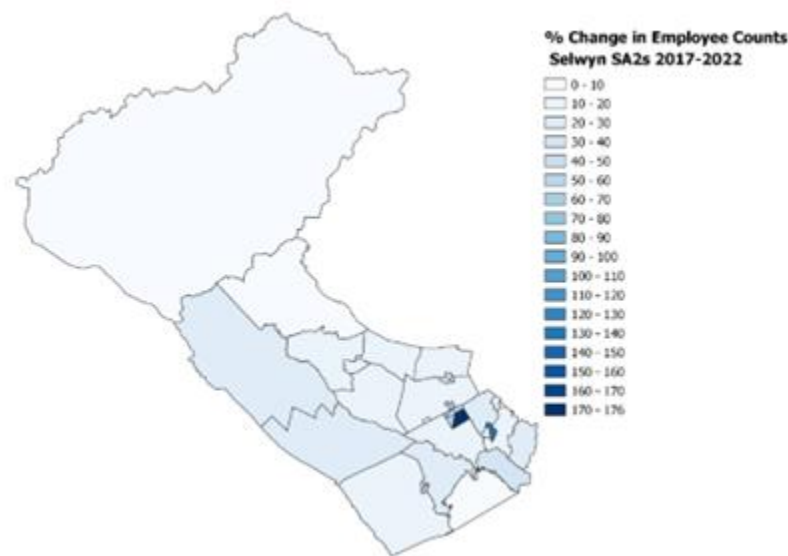


Figure 4-15: Projected change in employee numbers. Selwyn District Growth and Demand Report 2023/2024

Recent high population growth in the Selwyn District has increased demand for and viability of a wider range of goods, services and employment opportunities. Generally, as the population of an area grows, the increasing scale of demand generated can enable new goods to be provided. Household demands for goods and services are a core driver of economic activity in most economies, particularly retail. The annual level of electronic card consumer spending in the Selwyn District reflects population growth.

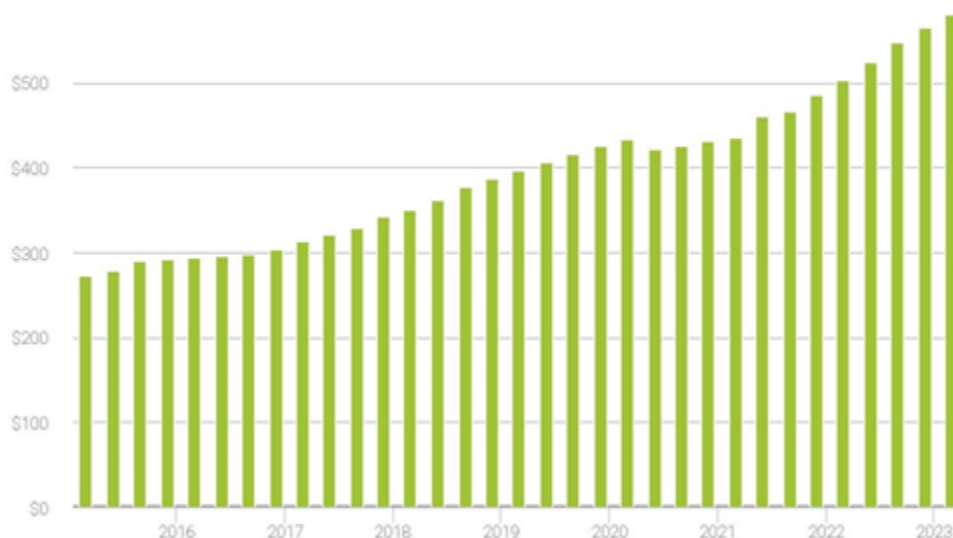


Figure 4-16: Annual Consumer Spending, Selwyn District. Infometrics. 2023

Until recently Selwyn’s centres have played a secondary role to the larger centres present in Christchurch, with a significant outflow of retail spend and employment to urban Christchurch. Currently only 35% of all retail and services spend by Selwyn residents is directed towards Selwyn businesses, and 65% leaks to other destinations, with centres in Christchurch City being by far the most popular destinations for Selwyn residents.

Living Standards

Productivity growth drives income growth and thus sustainable long-term improvements in material living standards. Productivity is a measure of the efficiency with which inputs (labour, capital, and raw materials) are converted into outputs (goods and services). Selwyn’s GDP per capita has generally shown progressive improvements for the last few decades but is still behind other territorial authorities.

Alongside GDP per capita, Selwyn’s mean per capita income is lower than the national average. The mean per capita income in Selwyn is \$41,849 and the national average is \$48,006, a gap of \$6157. The gap between the national mean per capita income as compared to the Selwyn District widened from 2016.

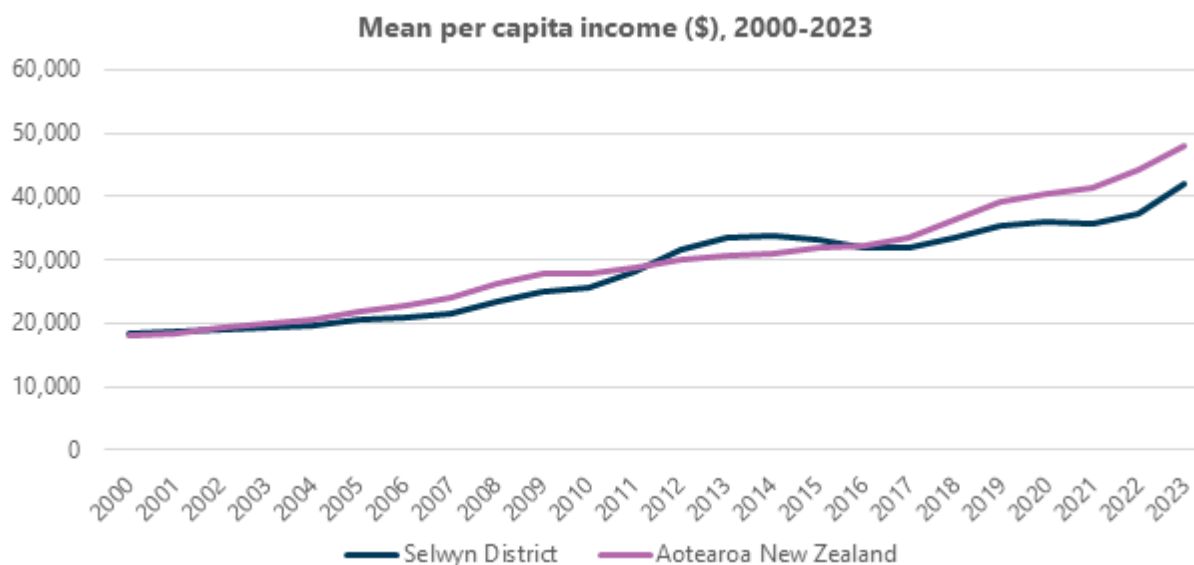


Figure 4-17: Historic income levels.

There is a persistent productivity problem in the national economy which filters down to the regions and local economies. Poor productivity performance in the national economy is attributable to a small domestic market, geographic isolation, lack of large firms competing internationally, shallow capital markets, lack of domestic competition, and lack of international connections. Economic growth has been based on increasing inputs, mainly labour by increasing number of hours worked but also from depleting capital stocks (especially natural capital). Lifting productivity is essential for raising incomes, material living standards, and overall quality of life.

4.2.5 Visitors and Tourism

Selwyn has a robust visitor and tourism offering that is spread throughout the district and relies heavily on natural capital. The Selwyn District in terms of tourism is not perceived wholly as one tourist destination but rather as a district that hosts several tourist attractions and is part of a wider and regional tourism network going south of Christchurch and through to the West Coast. Proximity to Christchurch International Airport means that the Selwyn tourism industry is positioned well to leverage opportunities from both domestic and international visitors. Visitors and tourists use a range of local infrastructure, facilities and amenities provided by local government and contribute to the demand for council services, consume existing and/or generate demand for greater capacity of these facilities and infrastructure. This brings forward renewals or timing of upgrades.

The tourism industry has not been a significant industry in the Selwyn economy. The graph below from Infometrics shows the tourism industry’s share of total GDP between 2000-2022 for the Selwyn District as compared to New Zealand. In 2022 the tourism industry’s share of Selwyn’s total GDP was 1.2%, below the national average of 2.8%. In 2020 the tourism industry’s share of Selwyn’s total GDP peaked at 1.8%, which was well below the national average of 4.4%.

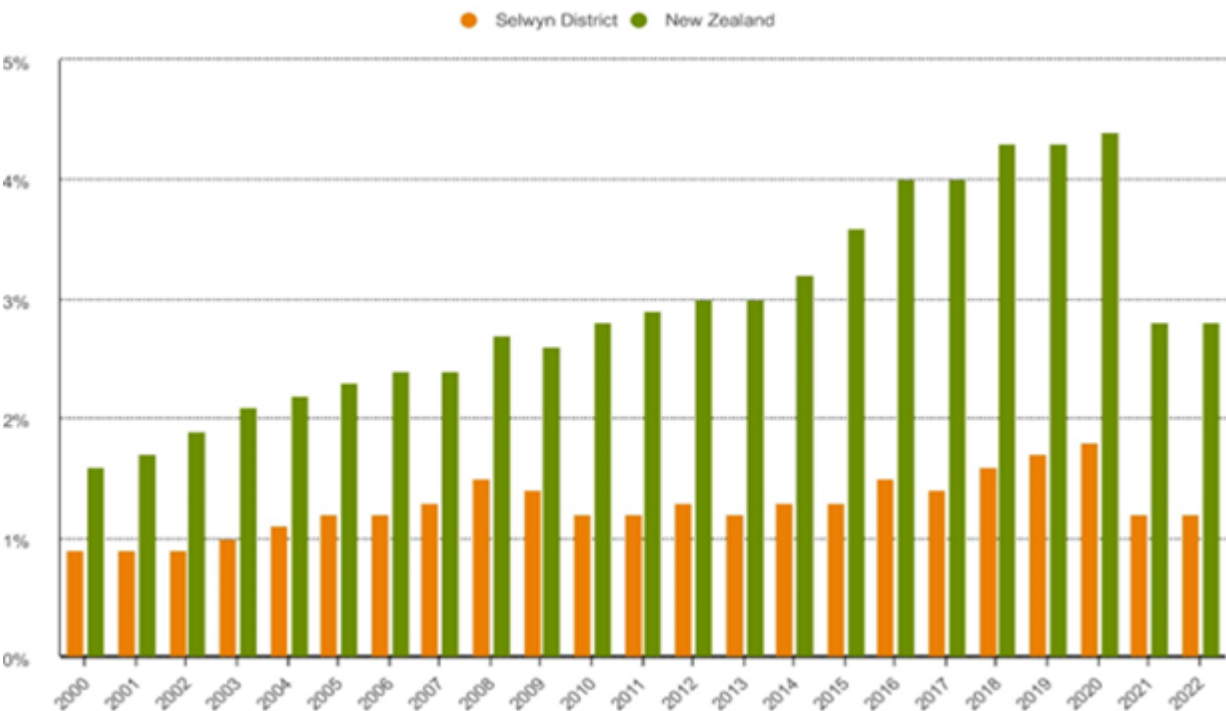


Figure 4-18: Tourism as percentage of GDP (Selwyn District and New Zealand). Infometrics. 2023

This data considers the Selwyn District as a whole, however when a place-based approach is taken, there are certain areas of the district where tourism plays a significantly greater role. Several small settlements, such as Arthurs Pass, Rakaia Huts, Castle Hill and Lake Coleridge are popular places for holiday homes and recreational activities. Arthurs Pass, Darfield and Springfield in particular, support summer and winter-sports by providing access to the Craigieburn Basin, Arthurs Pass National Park, Lake Coleridge, the Rakaia Basin and Mt Hutt.



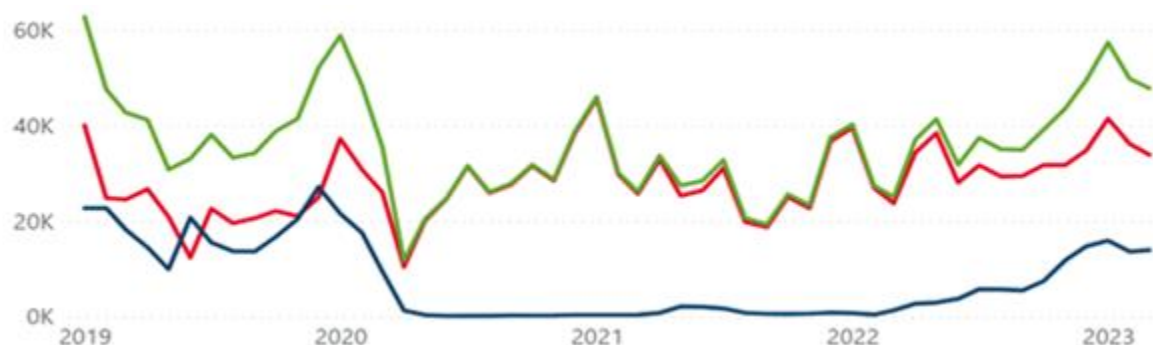


Figure 4-19: Domestic and International Visitor Numbers Selwyn District. ChristchurchNZ Visitor Trends Dashboard.
<https://www.christchurchnz.com/about-us/economic-insights/christchurchnz-tourism-research>

Most domestic and international tourists travel throughout New Zealand in January and February. Total visitor numbers for January and February 2023 for wider Canterbury were close to pre-pandemic levels when compared to total visitor numbers recorded in January and February 2019. In 2023 international visitors comprised a smaller portion of total visitor numbers and have yet to return to pre-pandemic levels.

Visitors spending has shown significant improvement on pre-pandemic levels and throughout the COVID-19 pandemic, visitor spending was proven to have rebounded quickly in response to restrictions and public health containment measures. As with the national experience, Selwyn experienced a sharp downturn in international visitor spending in early 2020, with a slow sustained recovery from 2021 onwards. Conversely, domestic visitor spending has been more variable, however there is a strong trend of increasing domestic visitor spending in the district. The graph below from ChristchurchNZ shows visitor spending based on data from Marketview. Visitor spending is not a proxy for total tourism spending, but it is a useful indicator. Spending is allocated based on origin; therefore, visitor spending is spending by those that originate outside the Selwyn District.

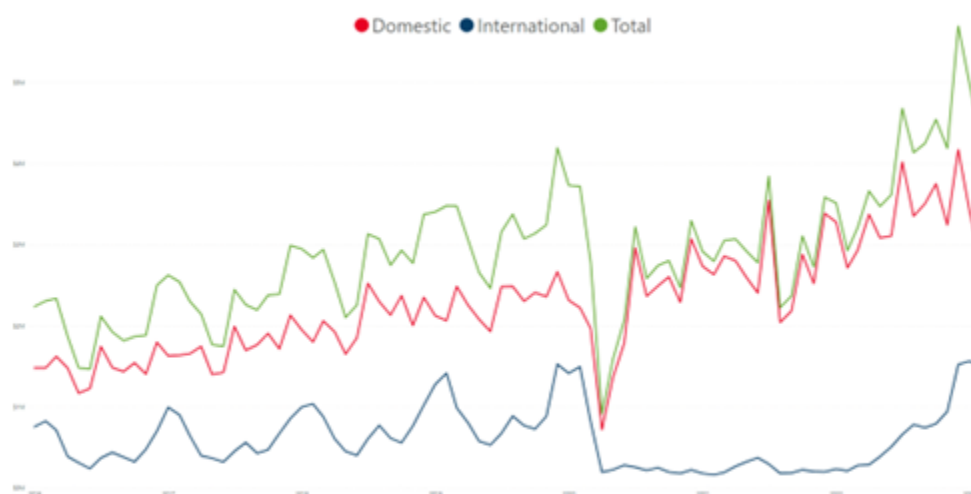


Figure 4-20: Domestic and International Visitor Spend Selwyn District. ChristchurchNZ Visitor Trends Dashboard.
<https://www.christchurchnz.com/about-us/economic-insights/christchurchnz-tourism-research>

Tourism is a dynamic and multifaceted industry that faces uncertainty, changing global trends and shocks. Nationally, there is considerable uncertainty about when, if ever, international tourism will return to pre-pandemic levels. Tourism forecasts which provided expectations on future tourism demand has ceased since the pandemic due to the challenge of forecasting with such uncertainty and lack of data.

4.2.7 Megatrends Influencing Selwyn's Outlook

There are several megatrends that are likely to influence Selwyn over the next decade. Mega-trends are large scale social, economic, political, environmental or technological changes that are slow to form, but once they have taken root, exercise a profound and lasting influence on many if not most human activities, processes and possessions. Megatrends of relevance to Selwyn include, but are not limited to:

A changing population	The population of the Selwyn District is projected to experience sustained growth and is subject to the demographic forces at play at the national level, particularly a migration-driven 'bite' in the young adult age, increased longevity, and falling birth rates; all of which contribute to an ageing population. The Selwyn District will need to account for growth in all age categories, including significant ageing-in-place.
Urbanisation of Selwyn population	Urbanisation is where an increasing share of the population living in urban areas. Urban population growth is the absolute growth in numbers of people living in urban areas. The Selwyn District has experienced both significant urbanisation and urban population growth over the preceding decades with this trend set to continue.
Low emission and climate resilient future	The transition to a low-emissions and climate-resilient future will require transformational change across sectors such as transport, energy, industry, construction, waste, agriculture, and forestry. The transition will also require technological advances, new systems, and behavioural change. The transition will entail significant and urgent cuts to greenhouse gas emissions and an expansion of carbon sinks.
Natural and climate related hazard exposure	The Selwyn District will continue to face the risk of natural hazards and climate related hazards. A warming planet will exacerbate existing hazards and will create new ones which places a considerable challenge on the adaptive capacity of both human and natural systems. The Auckland Anniversary weekend floods and Cyclone Gabrielle demonstrate the devastation and heavy toll of climate-related events that are set to become more common into the future.
Continued technological advancement	Continued technological advancement has led to global hyperconnectivity and digital dependence. The diffusion of digital technology over the last twenty-years has transformed society and the nature of work. Although new and emerging technologies offer considerable opportunities, there is considerable anxiety about the future of employment due to potential job destruction driven by technological change.
The economic aftereffects of COVID-19 and global conflict	These have ushered in skyrocketing inflation and the rapid normalization of contractionary monetary policies contributing to a cost-of-living crisis. Stubborn inflationary pressures are set to remain for the national economy over the short-term.

4.2.8 Recreation and Leisure Trends

Selwyn District Council has a role in enabling access to appropriate spaces and places to enable participation in sport and active recreation to promote the health, wellbeing, prosperity and social cohesion in the district. Many of the services covered under the Community Facilities umbrella are associated with the delivery or support of recreation and leisure activities.

It is important to understand overall trends as this can help to guide decision making on the types of facilities provided. Some changes in demand may be driven by demographic variations that are predicted to occur (e.g. ageing population). Trends can also be influenced by other factors such as economic conditions and population mobility, or changes to expected levels of service.

Sport New Zealand undertake a national Active New Zealand Participation Survey to monitor physical activity, in particular, sport and recreation participation among adults and children. The 2022 survey found that in general, the proportion of young people and adults participating each week is in line with 2021; however, the amount of activity has decreased. People are spending less time in fewer sports and activities and are less likely to be meeting the physical activity guidelines.

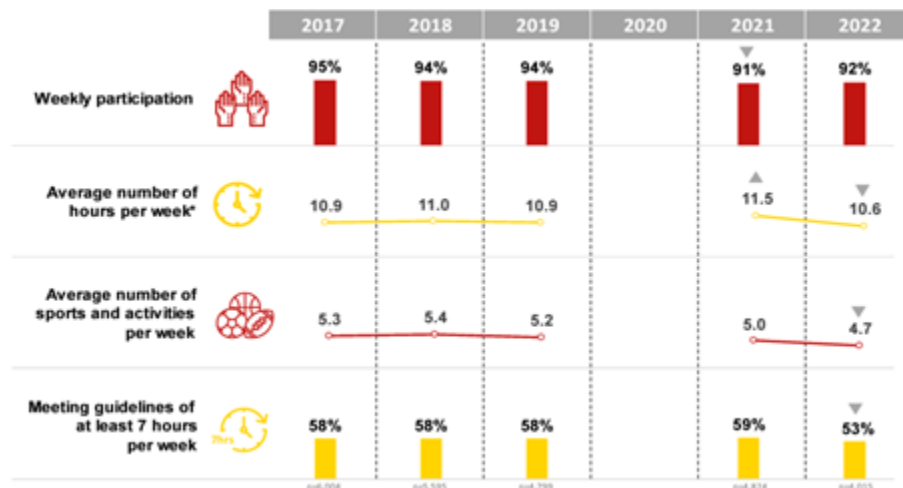


Figure 4-21: Young peoples national participation statistics over time (5-17 years). Sport New Zealand. 2022

Overall young people's weekly participation is in line with the 2021 data; however, the amount of activity has declined. This is shown by the decrease in the following key metrics

- The average number of sports and activities young people participate in each week has fallen from 5.0 in 2021 to 4.7 in 2022. This decline continues the downward trend from a high of 5.4 in 2018.
- The proportion of young people meeting the physical activity guidelines of at least 7- plus hours per week has decreased this year
- The average number of hours per week participated in has also fallen to 10.6 hours in 2022.

Young people can be split up into 2 different categories, Tamariki (5-11) and Rangatahi (12-17). In general, these decreases are driven by Rangatahi rather than Tamariki. These 2 groups have noticeable differences, which can be explored further in the [New Zealand Participation Survey 2022](#).



Figure 4-22: Adults' national participation statistics over time (18+). Sport New Zealand. 2022

While the proportion of adults participating in each week is stable, however the amount of activity has declined below pre COVID-19 levels. This is shown by decreases in the following metrics

- The average number of hours per week has fallen, from a peak of 5.4 hours in 2021 to 4.6 hours in 2022.
- The average number of sports and activities adults participate in has also fallen to 1.8 compared with 2.3 in 2021
- The proportion of adults meeting the physical activity guidelines of 2.5- plus hours each week decreased in 2022, from a peak in 2021.

The decreases in key participation statistics are more marked among adults aged 35 to 64. Their average number of hours participating per week has decreased by over an hour. Further information on adults' participation statistics can be found in the [New Zealand Participation Survey 2022](#).

Sport and active recreation participation

Data on participation for sport and active recreation for Canterbury and West Coast indicates that active recreation participation for adults is increasing relative to competitive sport. This reflects observed national trends that adult participation has become less formal and more individualised compared with young people who participate more in formal organised sport.

	Adults					Young People				
	2017	2018	2019	2021	2022	2017	2018	2019	2021	2022
Canterbury and West Coast weekly participation over time	75%	74%	75%	73%	73%	94%	98%	94%	93%	94%
Canterbury and West Coast average time spent in weekly participation (hours) over time	5.5	5.5	5.3	5.4	4.7	10.8	11.4	10.4	10.9	11.9

Of pertinence to the Community Facilities activity is the insight into participation trends with sports and recreation activities that are supported or provided through Council.

The *Insights Tool* (developed by Sport NZ) provides access to relevant information from different sources to uncover insights, and ultimately inform decisions.

Information on trends extracted from the *Insights Tool* indicates and tracks participation at a regional level. The data shown in the figure below lists the top 25 activities in the Canterbury region and indicates that walking is the most popular regional activity. The information also shows movement in participation levels

over time. It highlights a decline, apart from walking/power walking (+4.0%), nearly all of the activities have experienced a decline in the last year.

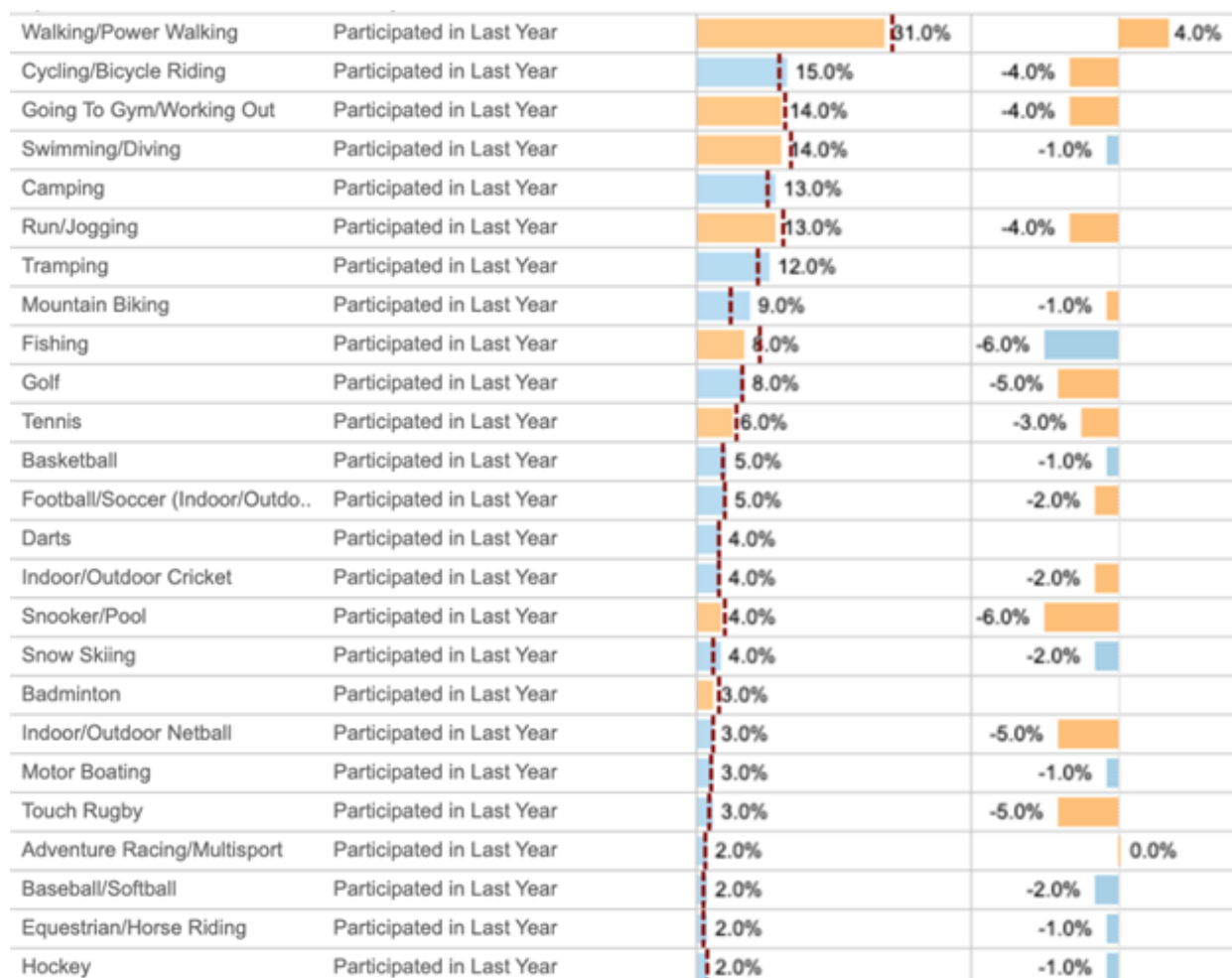


Figure 4-23: Top 25 activities in Canterbury Region (national average: dashed line). Insights Tool. Sport New Zealand

Within the Selwyn, the following are identified as the top 23 activities:

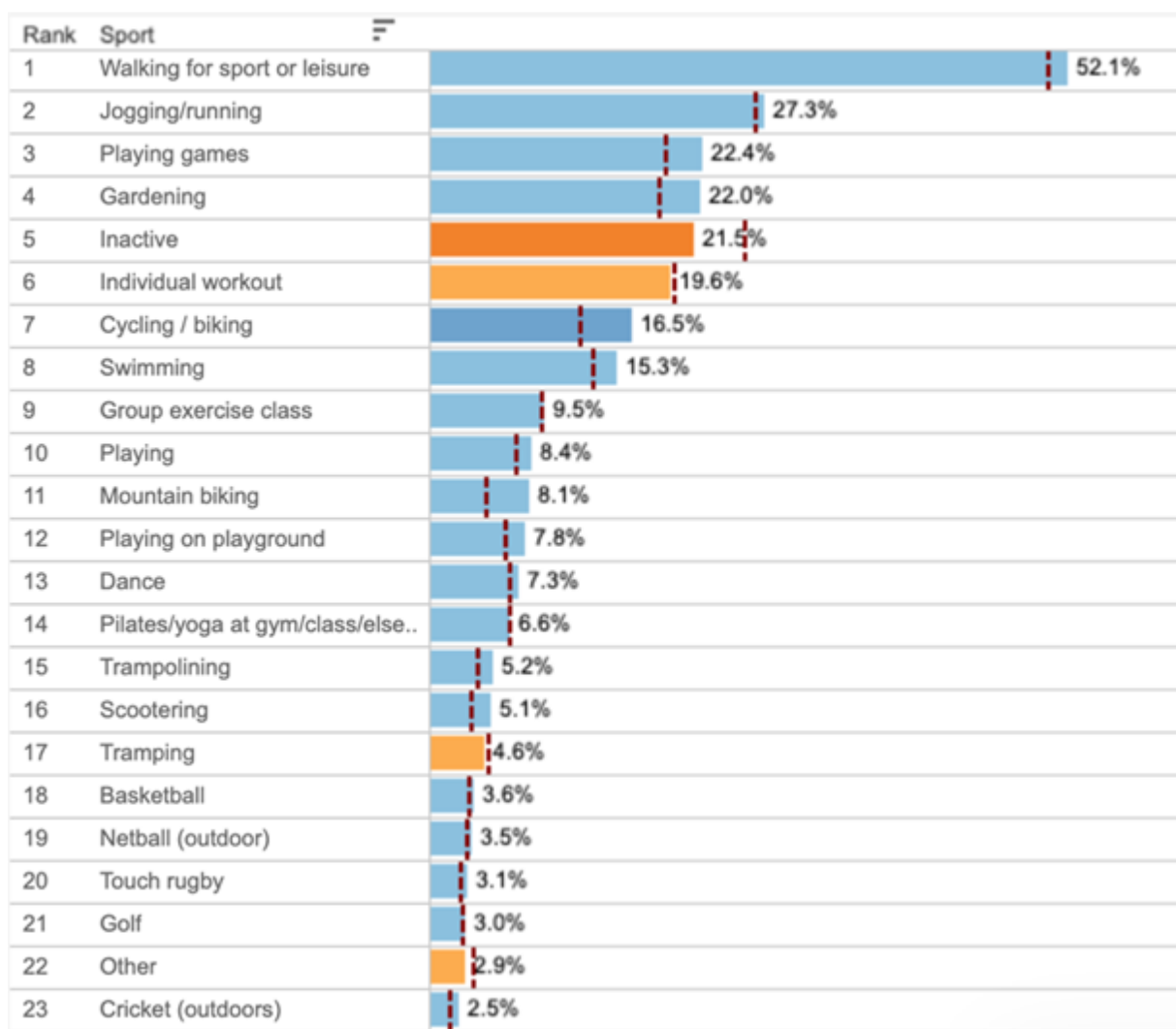


Figure 4-24: Top 23 activities in Selwyn District (national average: dashed line). Insights Tool. Sport New Zealand

In nearly every case the percentage of people participating in activities is above the national average. The only obvious activity below the national average is percentage of people being inactive at 21.5% for Selwyn compared to the national average of 25.8%. This means a higher percentage of people are active in the Selwyn District than the national average.

Key changes in competitive sports/organised participation include:

- Adults have seen a return to pre-covid 19 levels in participation in competitive sports from 2021 rising from 30% to 33%.
- Rangatahi (12-17) organised participation is in line with 2021 down 1% from 70% to 69% but is still down from pre-covid levels of 78%. Club membership has also declined from 83% (2021) of rangatahi being a member of a club to 78% in 2022.
- Tamariki (5-11) organised participation has returned to pre-covid 19 levels (81%) from 72% (2021) to 81% (2022). Club membership has remained stable at 77%, down 1% from 2021.

Teams participation

Individual and team sports around the Selwyn District 2016-2023 has seen shifts in the numbers of people participating in sports. These results may determine the need for more facilities or assets to help cater for demand from these activities. These changes can be seen in the graphs below.

Further information on the districts participation in sport can be found in RSL's Selwyn Districts Sports Participation Update report (October 2023).

	2016	2020	2023	CHANGE 2016-2023	% CHANGE	INDIVIDUAL VS TEAMS
Football	128	118	158	30	23%	
Hockey	7	32	31	24	343%	
Netball	136	145	143	7	5%	
Rugby	193	182	183	-10	-5%	
Rugby League*	6	n/a	6	0	0%	
Athletics	220	210	215	-5	-2%	Individuals
Cricket	73	109	121	48	66%	Teams
Softball	32	21	27	-5	-16%	Teams
Tennis	184	240	226	42	23%	Teams
Touch	241	295	304	63	26%	Teams
Archery	30	15	33	3	10%	
Lawn Bowls	323		329	6	2%	
Equestrian	203	193	151	-52	-26%	
Pickleball	N/a	N/a	1334			

	2016	2020	2023	CHANGE 2016-2023	% CHANGE	INDIVIDUAL VS TEAMS
Badminton	215	233	251	36	17%	Individuals
Basketball	1337	1466	1697	360	27%	Individuals
Volleyball	112	84	112	0	0%	Teams

Many codes (cricket football, hockey, netball, tennis and touch) are expected to continue to see growth. Rugby and Softball have a trend of declining participation, so the rate of participation growth (due to population growth) is likely to be more than subdued than other codes. Volleyball projections based on population growth cannot be calculated due to no data being available in previous years. Participation in Rugby League appears to be stable.

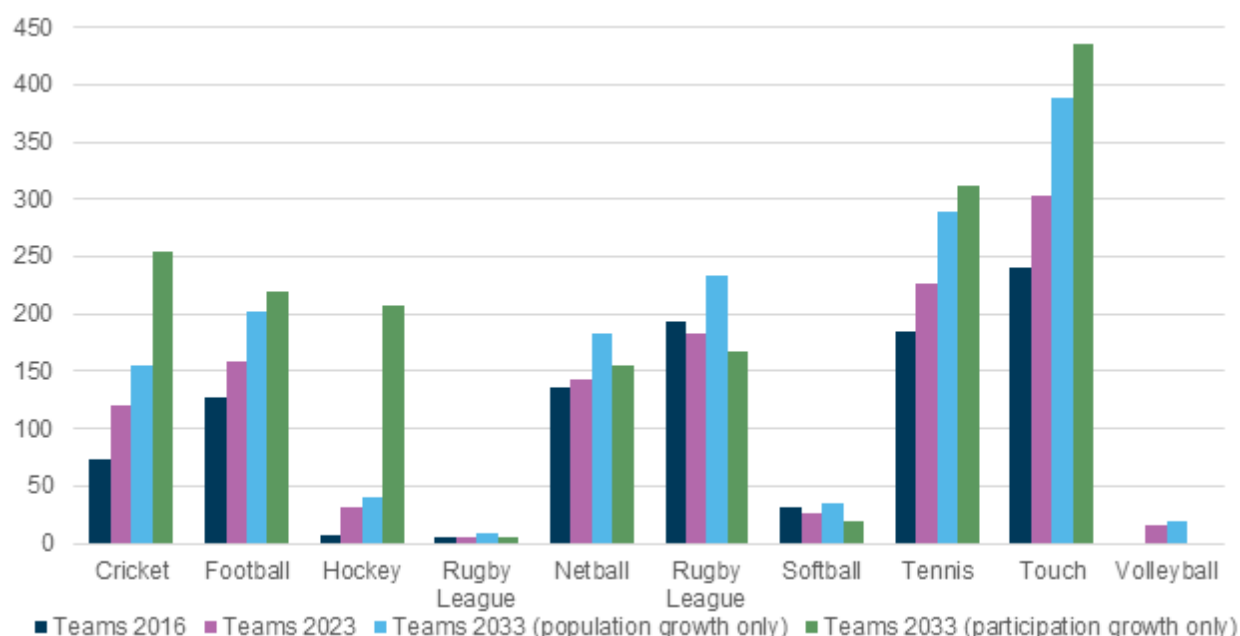


Figure 4-25: Selwyn District Sports Teams Projection (actuals and projected 2023 scenarios - population vs participation)

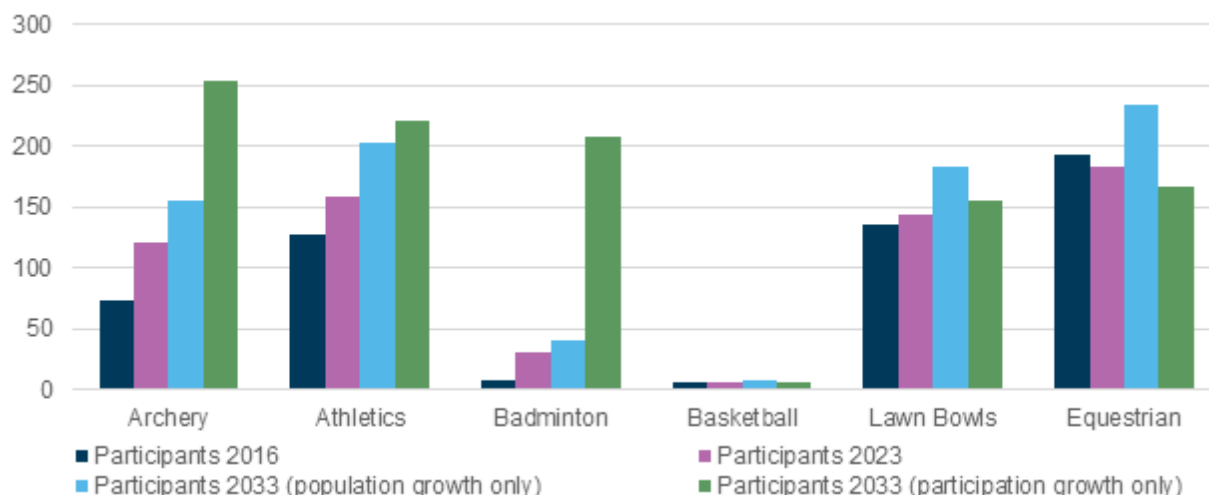


Figure 4-26: Selwyn District Individual Sport Participation Projection (actuals and projected 2033 scenarios - population vs participation)

Significant growth can be expected in basketball and badminton in the next 10 years. While there is likely to be growth in archery, athletics and lawn bowls it will be at a more moderate level. The trend for equestrian is a little less certain, partly because the data for 2023 is not complete. Based on feedback received, participation in equestrian is likely to remain at similar or slightly higher than current levels. Care needs to be taken, when using any of the participation growth projections as many of these sports did not have any large indoor facility, until the Selwyn Sports Centre opened (especially basketball and badminton), thereof the participation predictions need to be tempered. It is also important to note that the basketball participation numbers are from 2020. Further information on the districts participation in sport can be found in RSL's Selwyn Districts Sports Participation Update report in October 2023.

As a key provider of places for sport and recreation it is also useful to gain an understanding of the changes in participation in sports and recreation at a local level. This information helps to guide decision making on the types of facilities to be provided and the timing to meet demand.

4.3 Incorporating growth trends into planning

Forecasting demand for infrastructure assets is crucial because it enables us to anticipate future needs and prepare accordingly. By understanding how populations grow, the makeup of our communities and needs change and how our operating environment evolves, we can estimate how much our infrastructure will be used and what kinds of stresses it will face. We can also make some assumptions and plan for changes in our operating framework. This foresight allows us to plan strategically, allocate resources effectively, and prioritise investments in the most critical areas.

By forecasting demand, we can identify potential bottlenecks or areas of strain in advance, allowing us to take proactive measures to address them. Accurate forecasts enable us to make informed decisions about where to invest limited resources, ensuring that infrastructure systems can support the needs of communities both now and in the future. Ultimately, forecasting demand for infrastructure assets is essential for building resilient, adaptable and sustainable infrastructure that can serve the needs of our future communities.

Recently, planning for future growth within Selwyn District has been driven by the District Plan Review and Private Plan Changes. These have largely been fulfilling the broader growth pattern outlined in the Canterbury Regional Policy Statement. The review and plan changes have also overlapped with government directions, notably the National Policy Statement on Urban Development (NPS-UD) 2020, the Resource Management - Enabling Housing Supply and Other Matters Amendment Act 2021 (EHS Act), and the National Policy Statement on Highly Productive Land 2022 (NPS-HPL). The NPS-UD has provided a pathway for unanticipated plan changes and intensification in the right locations. The EHS Act has enabled three houses up to three storeys on all sites. While the NPS-HPL has limited urban expansion onto the most versatile soil.

The NPS-UD has presented increased opportunities for private plan change development in recent years, driving increased urban development in the Prebbleton, Lincoln, Rolleston and West Melton. As these progress, significant new infrastructure will eventually be vested in Council, Council is also required to provide wider upgrades to its adjoining roading and water services networks to cater for this urbanisation and growth. In some cases, the approved developments cannot proceed until upgrades are completed by Council. This puts pressure on Council to fund and programme upgrades in response to developers expectations.

These directions have required changes to the District Plan and shape the capacity of development potential in the district. Long-Term growth areas around Rolleston have been rezoned, while the towns of Rolleston, Lincoln, and Prebbleton have been enabled for greater intensification in line with the EHS Act.

Key impacts of growth and demand on the Community Facilities activity are summarised as follows:

- Urbanisation increasing demand for available capacity within existing services, including Darfield, Leeston and the wider eastern Selwyn. Urbanisation is also driving increasing level of service expectations. Planning will require careful consideration of the balance of increasing service levels and cost. Greater Christchurch shared solutions may support improvements while minimising further costs.
- Recreation and leisure trend data indicates a gradual but sustained movement away from competitive, organised sports to other forms of active recreation. This continued trend has implications for provision of sports and recreation facilities and specifically a lower need for organised sport space and facilities relative to population and increased need to provide for more informal recreation activities.
- Changes in preferences in sports activities are noted through both Sport NZ data and locally captured data. This indicates a decline in some traditional sports (e.g. rugby, netball) and increase in participation in sports such as basketball that are primarily reliant on indoor venues. This trend is strengthened with changes in the ethnicity of communities where participation in indoor sports activities is more prevalent. Growth in most sports is still expected resulting from the increase in population but the changes to sport preferences is likely to increase demand for indoor court space with the consequential need for more indoor facilities. The projected changing demographics sees a higher proportion of people in the older (65+) age group. This change will also have an impact on the types of sports and recreation facilities to be provided. The overall requirement especially for outdoor competitive sports space is likely to decline or require different facilities. This change may also signal the need to decommission some assets such as playgrounds at end of life with no replacement.
- The aging population means that the death rate will continue to rise from about 220 per year in 2023 to over 740 by 2054. This has implications for cemeteries provision. Based on the forecast uptake of burial plots over next 30 years and the available capacity in Council cemeteries, it is expected that the available burial capacity will be reduced by 85%. This signals the need to progressively develop extensions to our cemeteries where land is already available and to acquire land for a new cemetery in the eastern Selwyn area to meet future demand.
- Increasing demand for walking and cycling for transportation and active recreation, requiring alignment of work programmes with Transportation. Convenient linkages are key to ensuring there is a safe option available. There is also increasing demand and opportunity for cycle tourism.

Further information about these trends and impacts to asset management planning can be found in the respective activity sections of this AcMP.