Queenstown Lakes District Housing and Business Development Capacity Assessment 2025

Addendum – Incorporation of UIV Decisions

13 August 2026 – Final

m.e consulting

Queenstown Lakes District Housing and Business Development Capacity Assessment 2025

Addendum – Incorporation of UIV Decisions

Prepared for

Queenstown Lakes District Council and Otago Regional Council

Document reference: QLDC_Addendum_Final

Date of this version: 13 August 2026

Report author(s): Susan Fairgray-McLean

www.me.co.nz

Disclaimer: Although every effort has been made to ensure accuracy and reliability of the information contained in this report, neither Market Economics Limited nor any of its employees shall be held liable for the information, opinions and forecasts expressed in this report.

Contents

1 INTRODUCTION 1

1.1 CONTEXT 1

1.2 STRUCTURE OF ADDENDUM 1

1.3 SCOPE OF ADDENDUM CHANGES TO ASSESSMENT 2

2 SUMMARY OF DECISIONS VERSION UIV CHANGES TO DEVELOPMENT OPPORTUNITY ... 3

2.1 OVERVIEW OF CHANGES 3

2.2 WHAKATIPU WARD UIV CHANGES 5

2.3 WĀNAKA WARD UIV CHANGES 8

3 RESIDENTIAL CAPACITY 10

3.1 PLAN ENABLED CAPACITY 10

3.2 INFRASTRUCTURE-READY CAPACITY 21

3.3 SERVICED, FEASIBLE AND REASONABLY EXPECTED CAPACITY 24

4 RESIDENTIAL SUFFICIENCY 27

4.1 MEDIUM-TERM SUFFICIENCY 27

4.2 LONG-TERM SUFFICIENCY 29

5 IMPLICATIONS OF CHANGES 32

6 APPENDICES 36

Figures

FIGURE 2-1 – WHAKATIPU WARD (QUEENSTOWN WEST) UIV IHP ZONING CHANGE RECOMMENDATIONS 6

FIGURE 2-2 – WHAKATIPU WARD (QUEENSTOWN CENTRAL AND FRANKTON ARM) UIV IHP ZONING CHANGE RECOMMENDATIONS 7

FIGURE 2-3 – WHAKATIPU WARD (FRANKTON ARM AND FRANKTON) UIV IHP ZONING CHANGE RECOMMENDATIONS 8

FIGURE 2-4 – WĀNAKA UIV IHP ZONING CHANGE RECOMMENDATIONS 9

Figure 3-3 – Short and Medium-Term Plan Enabled Capacity: 2025 HBA vs. Updated QLDC Growth Model Outputs 12

Figure 3-4 – Net Differences in Medium and Long-Term Plan Enabled Capacity: 2025 HBA vs. Updated QLDC Growth Model Outputs 13

Figure 3-5 – Short and Medium-Term Plan Enabled Capacity by Reporting Area: 2025 HBA vs. Updated QLDC Growth Model Outputs 15

Figure 3-4 – Summary of QLDC Growth Model Changes in Plan Enabled Capacity by Ward and Location Type 18

Figure 3-5 – QLDC Growth Model Plan Enabled Capacity by Reporting Area and Time-Period 20

Figure 3-6 – Medium-Term Residual Infrastructure and Plan Enabled Capacity by Reporting Area 23

Figure 3-7 – Long-Term Residual Infrastructure and Plan Enabled Capacity by Reporting Area 23

Figure 3-8 – Medium-Term RER and Infrastructure Capacity by Reporting Area 25

Figure 3-9 – Long-Term RER and Infrastructure Capacity by Reporting Area 26

Figure 4-1 – Summary of Capacity and Demand by Reporting Area: Medium-Term 29

Figure 4-2 – Summary of Capacity and Demand by Reporting Area: Long-Term 31

Tables

Table 3-1 – Medium and Long-Term Plan Enabled Capacity: 2025 HBA vs. Updated QLDC Growth Model Outputs 11

Table 3-2 – Medium and Long-Term Plan Enabled Capacity by Reporting Area: 2025 HBA vs. Updated QLDC Growth Model Outputs 14

Table 3-3 – QLDC Growth Model Plan Enabled Capacity by Ward and Time-Period 17

Table 3-4 – Changes in QLDC Growth Model Plan Enabled Capacity between Time Periods 17

Table 3-5 – QLDC Growth Model Plan Enabled Capacity by Reporting Area and Time-Period 19

Table 3-6 – Combined Infrastructure Network Net Additional Dwelling Capacity 22

Table 3-7 – Summary of Medium-Term RER Dwelling Capacity by Ward 25

Table 3-8 – Summary of Long-Term RER Dwelling Capacity by Ward 26

TABLE 4-1 – MEDIUM-TERM SUFFICIENCY BY WARD, LOCATION TYPE AND DWELLING TYPE: BASELINE RER SCENARIO 28

TABLE 4-2 – MEDIUM-TERM SUFFICIENCY BY REPORTING AREA, LOCATION TYPE AND DWELLING TYPE: BASELINE RER SCENARIO 28

TABLE 4-3 – SUMMARY OF CAPACITY, DEMAND AND NET SUFFICIENCY BY REPORTING AREA: MEDIUM-TERM 29

TABLE 4-4 – LONG-TERM SUFFICIENCY BY WARD, LOCATION TYPE AND DWELLING TYPE: BASELINE RER SCENARIO 30

TABLE 4-5 – LONG-TERM SUFFICIENCY BY REPORTING AREA, LOCATION TYPE AND DWELLING TYPE: BASELINE RER SCENARIO 30

TABLE 4-6 – SUMMARY OF CAPACITY, DEMAND AND NET SUFFICIENCY BY REPORTING AREA: LONG-TERM 31

TABLE 6-1 – MEDIUM AND LONG-TERM PLAN ENABLED AND RER CAPACITY DEVELOPMENT MODELLING PARAMETERS: DISTRICT PLAN ZONES 36

TABLE 6-2 – MEDIUM AND LONG-TERM PLAN ENABLED CAPACITY INPUTS AND ASSUMPTIONS FOR BUSINESS DEVELOPMENT CAPACITY MODELLING PARAMETERS: DISTRICT PLAN ZONES 37

1 Introduction

1.1 Context

This report has been prepared as an addendum to the QLD 2025 HBA to understand the modelled outcomes of the Decisions Version Urban Intensification Variation (UIV) provisions. It provides an updated assessment of the sufficiency of enabled capacity to accommodate projected future growth in the district from the 2025 HBA which applied the Notified Version UIV provisions.

The Decisions Version UIV enables intensification to occur across parts of the district's existing urban environment to give effect to NPS-UD Policy 5. It increases the level of enabled development through increases to building heights and density provisions, resulting in corresponding changes in development capacity.

In accordance with the NPS-UD technical requirements, changes to the modelled residential dwelling capacity have occurred from the medium-term[1]. The district's residential capacity and sufficiency pictures are also changed in the long-term as the medium-term urban environment also forms a sizeable component of the long-term urban environment, with capacity in this area expected to continue to be taken up through time.

The addendum provides an updated assessment of the Queenstown Lakes District Council (QLDC) growth model dwelling capacity outputs[2]. These outputs incorporate the Decisions Version of the UIV as formally adopted by Queenstown Lakes District Council on 5 February 2026.

The addendum updates sections of the QLD 2025 HBA and should be read together with the original document as set out in Section 1.3 below.

1.2 Structure of Addendum

The addendum is structured in the following way:

- The remainder of this section (Section 1.3) describes the scope of changes to the QLD 2025 HBA covered by this addendum. It identifies which components of the assessment have been updated as result of the Decisions Version UIV and which parameters remain unchanged.
- Section 2 briefly summarises the main changes to development opportunity that have occurred through the Decisions Version UIV from that previously modelled under the Notified Version UIV.
- Section 3 contains the updated modelled residential capacity outputs.
- Section 4 provides an updated sufficiency assessment of residential capacity.

[1] Although the Decisions Version UIV outcomes are already influence development patterns in the district, the NPS-UD technical requirements (3.4 (1)) are to only apply these provisions in the capacity modelling from the medium-term as they were not operative at the time of model development.

[2] Updated outputs from the growth model have been supplied to M.E Ltd by QLDC to form inputs to the assessment.

- The implications of the Decisions Version UIV for the district's ability to meet future growth are discussed in Section 5.
- The updated QLDC growth model input parameters to model the Decisions Version UIV are provided as an appendix in Section 6.

1.3 Scope of Addendum Changes to Assessment

The Addendum updates the QLD 2025 HBA residential sufficiency assessment through applying the changes to residential dwelling capacity as estimated by the QLDC growth model. It updates the residential capacity picture and then recalculates the net sufficiency position in terms of net additional dwellings compared to projected demand. The projected dwelling demand for the district remains unchanged from that contained in the QLD 2025 HBA.

The addendum also examines the changes to the types of development opportunity as a result of the Decisions Version UIV. This refers to the types and scale of dwelling development opportunities enabled as distinct from the dwelling capacity (in terms of net additional dwellings) they produce. It considers the impact of changes to the types of development opportunity on the district's ability to meet projected future housing needs.

The Decisions Version UIV changes in capacity have been applied across the spatial extent of the existing urban environment previously covered by the PDP in the QLD 2025 HBA. Changes in capacity have not occurred in the future urban areas covered by the Spatial Plan in the long-term, nor the areas covered by Operative District Plan Special Zones. These areas are outside the scope of the Decisions Version UIV.

The updated development opportunity from the Decisions Version UIV has been applied to each parcel in the QLDC growth model. This has occurred through changing the height and density inputs applied at the plan enabled capacity stages in the growth model. The updated input assumptions are contained in the Appendix in Section 6.

The Addendum does not cover the QLDC growth model technical approach to modelling capacity as this remains unchanged from the QLD 2025 HBA, albeit with changed input assumptions. All other components within the model (including the infrastructure network capacity limits) remain unchanged along with the model base year and projection periods. As such, the description of the technical approach in the 2025 HBA remains current.

Only the residential capacity growth model outputs have changed from the Decisions Version UIV. The business capacity outputs remain unchanged as there has been no change to the business zone extents from that of the Notified Version UIV. In some cases, there have been (generally minor) height increases within the business zones (e.g. within the Three Parks area). However, these have not affected the modelled business capacity as the model has assumed that the additional height is likely to be taken up in residential rather than business uses.

2 Summary of Decisions Version UIV Changes to Development Opportunity

2.1 Overview of Changes

QLDC have recently (5 February 2026) adopted the recommendations of the IHP on the Urban Intensification Variation (UIV) ("the Decisions Version UIV") to apply within the district's urban environment. It applies to the extent of the existing urban environment covered by the Proposed District Plan (PDP)[3].

The Decisions Version UIV significantly increases the level of development opportunity through intensification within the district's urban environment from that of the PDP. It provides for increases to the height and density of enabled development to give effect to Policy 5 under the NPS-UD.

A greater range of dwellings (typologies, sizes and intensities) are enabled to align with projected future demand in housing across different parts of the district. This correspondingly increases the level of enabled dwelling capacity, also contributing toward meeting the district's NPS-UD Policy 2 requirements. The enabled opportunity is intended to balance objectives to cater for future growth with effects on amenity and character within each location.

The following sub-sections provide a brief summary of the changes in development opportunity enabled by the Decisions Version UIV, which influence the changes in residential capacity. They consider the changes in development opportunity from the short-term (where the ODP and PDP are applied) and the changes in development opportunity from that previously modelled in the 2025 HBA under the Notified Version UIV. Further information on these changes is available in the QLDC 5 February 2026 Council Agenda Report[4], IHP Recommendation Report[5] and IHP Recommendation[6].

Intensification in Central Areas

The Decisions Version UIV generally increases the level of development opportunity in the more central parts of the district's urban environment[7] that have greatest levels of accessibility from that in the PDP. Intensification opportunity is focussed into appropriate locations such as within the district's main

[3] This includes live-zoned greenfield areas covered by the PDP. Areas of long-term future urban expansion covered by the Spatial Plan and areas covered by the Operative District Plan (ODP) Special Zones fall outside the scope of the UIV.

[4] QLDC, 2026. *Report and recommendations of the Independent Hearing Panel for the Urban Intensification Variation to the Proposed District Plan,* Council Report for Full Council meeting on 5 February 2026.

[5] Appendix 1: Revised Chapter Provisions and Maps as recommended by the panel.

[6] IHP, 2025. *Recommendation of the Independent Hearing Panel,* Urban Intensification Variation, 23 December 2025.

[7] This refers to the main town centres and their surrounding residential suburbs, which are closer to these areas than outer suburban areas of the district. In the Whakatipu Ward, this refers to the area covered by the Queenstown Reporting Area, as well as residential areas immediately surrounding the commercial node at Frankton. In the Wānaka Ward, this refers to the town centre and Three Parks commercial areas and the immediately surrounding residential areas.

commercial centres and their surrounding residential areas. Enabled building heights have been increased within parts of the district's main commercial centres.

Intensification within the central parts of the district's residential areas is encouraged through application of the High Density Residential (HDR) and Medium Density Residential (MDR) Zones. In the Decisions Version UIV, each zone has been further divided into two separate zones (to also include a High Density Residential A Zone (HDRA) and Medium Density Residential A (MDRA) Zone), with important differences in the enabled development with these divisions. The HDRA and MDRA zones have higher levels of enabled development, with their spatial application in each ward described further below.

The HDR/HDRA zones anticipate higher intensity development, with the residential component consisting of increasing shares of apartments and intensive terraced housing through time. Greater heights are enabled in the HDRA zone.

The MDR/MDRA zones anticipate a mixture of dwelling types within areas where they are applied. There are important differences in the types of dwellings enabled by the respective height and density provisions between these zones. MDR Zone generally enables smaller detached dwellings, up to two-storey attached dwellings, with a net site are of 250m2 per dwelling. A significantly higher level of intensification is enabled by the MDRA Zone to include up to 3 storey more intensive terraced housing and low-rise apartments.

The further division of the HDR and MDR zones (from the Notified Version UIV), through the introduction of the HDRA and MDRA zones to the PDP, is an important change from the development opportunity modelled in the 2025 HBA under the Notified Version UIV. The HDRA and MDRA have a similar level of development opportunity to that of the Notified Version UIV HDR and MDR Zones, with a significantly lower development opportunity across the Decisions Version HDR and MDR Zones. The difference in provision, combined with some change to the spatial extent of the zones (from that of the Notified Version UIV), changes the level of plan enabled capacity in these zones from that previously modelled. The changes in each Ward are described below.

Development Opportunity in Suburban Areas

Changes to development opportunity have also occurred in less central, suburban, parts of the district's urban environment, with resulting lower provision than more central locations. The Decisions Version UIV[8] increases flexibility within the Suburban Residential Zone (SRZ) to enable a greater range of infill development from the Notified Lower Density Suburban Residential Zone (LDSRZ). This predominantly remains at a suburban scale, with additional opportunity focussed toward smaller detached and less-intensive attached dwellings.

The Decisions Version UIV takes a different approach to increasing the development opportunity in suburban areas to that of the Notified Version UIV (where both increase capacity from the PDP). The level of development enabled within the SRZ is determined through building standards in the Decisions Version UIV, providing greater flexibility in typologies and dwelling sizes achieved across the site and potentially much greater densities. This differs to the Notified Version UIV where development opportunity was instead increased from the PDP through the application of an average land area per dwelling across the

[8] Noting that the Notified UIV used the Lower Density Suburban Residential Zone, which was renamed in the UIV Decisions Version to Suburban Residential Zone.

site (which ultimately limits density). The capacity enabled in this zone remains the same as the 2025 HBA as the same densities (plan enabled at 300m2 land area per dwelling) are applied in the QLDC growth model.

There are important differences in the Decisions Version UIV development opportunity between different parts of the district, which are likely to affect the development outcomes across the district through time. The main changes[9] are shown in the subsequent sections.

2.2 Whakatipu Ward UIV Changes

The Decisions Version UIV has increased the heights and levels of development enabled across parts of the Queenstown Town Centre from the PDP. It has also increased the opportunity for residential intensification across the central and more accessible parts of the ward, with a greater focus toward the Queenstown Town Centre.

The maps below show the changes[10] in the application of the high and medium density residential zones within the Whakatipu Ward. The HDRA Zone is applied in areas closest to the town centre, providing for development of up to at least 5 storeys across this area. Further intensification, at up to three storeys, is enabled in the adjacent residential areas to the northeast of the HDRA zone that are within proximity to the town centre.

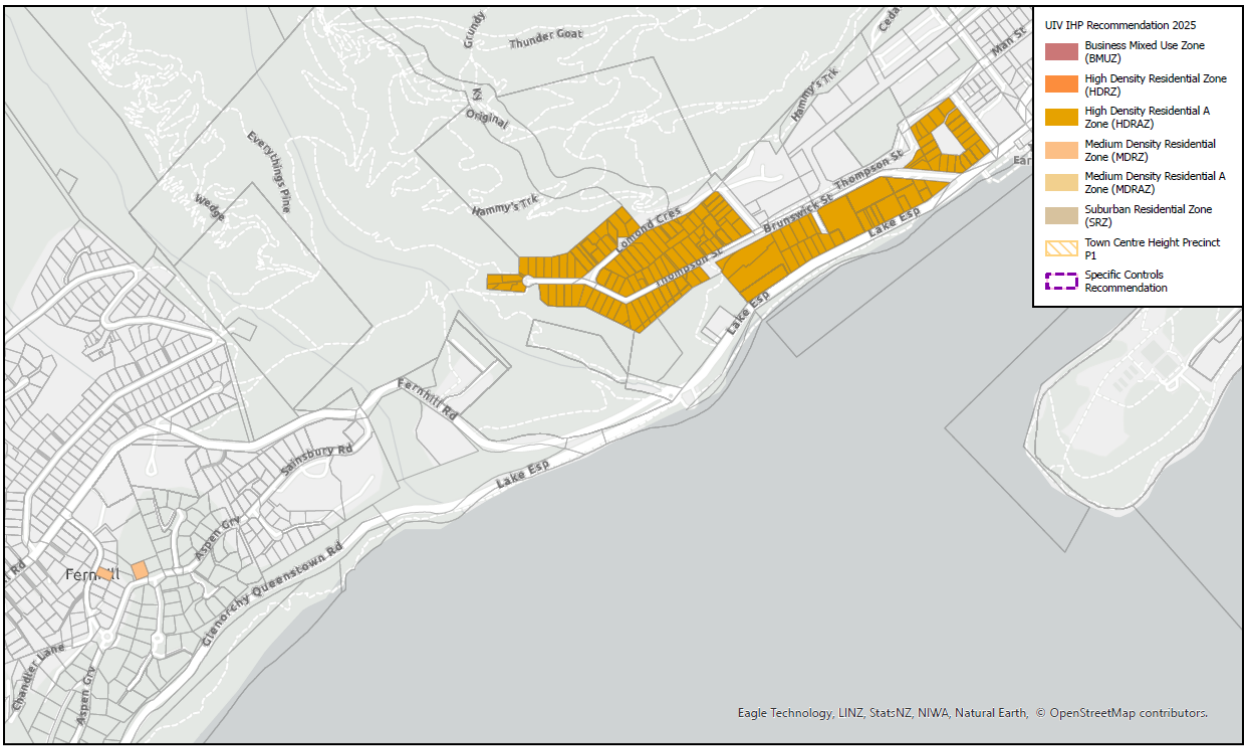
The Decisions Version UIV also provides for some further intensification (from that enabled under the PDP), albeit at a lower scale, across other relatively central parts of the ward. Lower density suburban residential areas along Frankton Arm and around limited parts of Frankton have been upzoned to the MDR Zone.

Although the Decisions Version UIV significantly increases the development opportunity from the PDP, it changes the level of intensification across the central residential areas of the ward from that of the Notified Version UIV (with an overall reduction in capacity enabled in the HDR and MDR zones). It more tightly focuses the intensification opportunities to the more central areas covered by the HDRA and MDRA zones (closer to Queenstown Town Centre), with the balance of the HDR and MDR zones providing a reduced level of intensification from that of the Notified Version UIV.

[9] Further detail on the specific changes within each location are contained in the IHP Recommendations Report and recommended provisions and mapping. https://www.qldc.govt.nz/media/oddmt11j/4b-ihp-recommendation-report-uiv-appendix-1-recommended-provisions-mapping-2.pdf

[10] It is important to note that these maps show the changes to the application of these zones. The further areas of these zones that are already included in the PDP are shown in QLDC's online District Plan GIS viewer.

Figure 2-1 – Whakatipu Ward (Queenstown West) UIV IHP Zoning Change Recommendations



The information provided on this map is intended to be general information only. While considerable effort has been made to ensure that the information provided on this map is accurate, current and otherwise adequate in all respects, Queenstown Lakes District Council does not accept any responsibility for content and shall not be responsible for, and excludes all liability, with relation to any claims whatsoever arising from the use of this map and data held within.

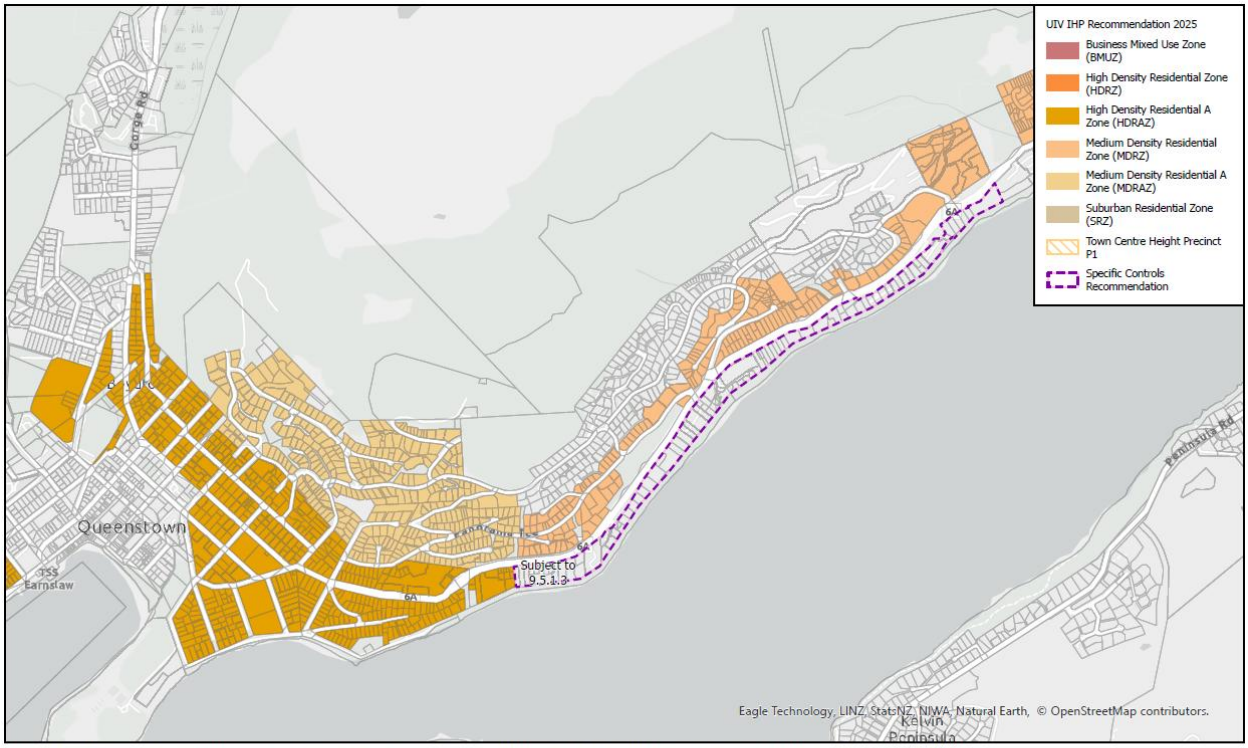
QUEENSTOWN LAKES DISTRICT COUNCIL

Scale: 0 0.35 0.7 Kilometers

Map Date: 12/12/2025

N

Figure 2-2 – Whakatipu Ward (Queenstown Central and Frankton Arm) UIV IHP Zoning Change Recommendations



The information provided on this map is intended to be general information only. While considerable effort has been made to ensure that the information provided on this map is accurate, current and otherwise adequate in all respects, Queenstown Lakes District Council does not accept any responsibility for content and shall not be responsible for, and excludes all liability, with relation to any claims whatsoever arising from the use of this map and data held within.

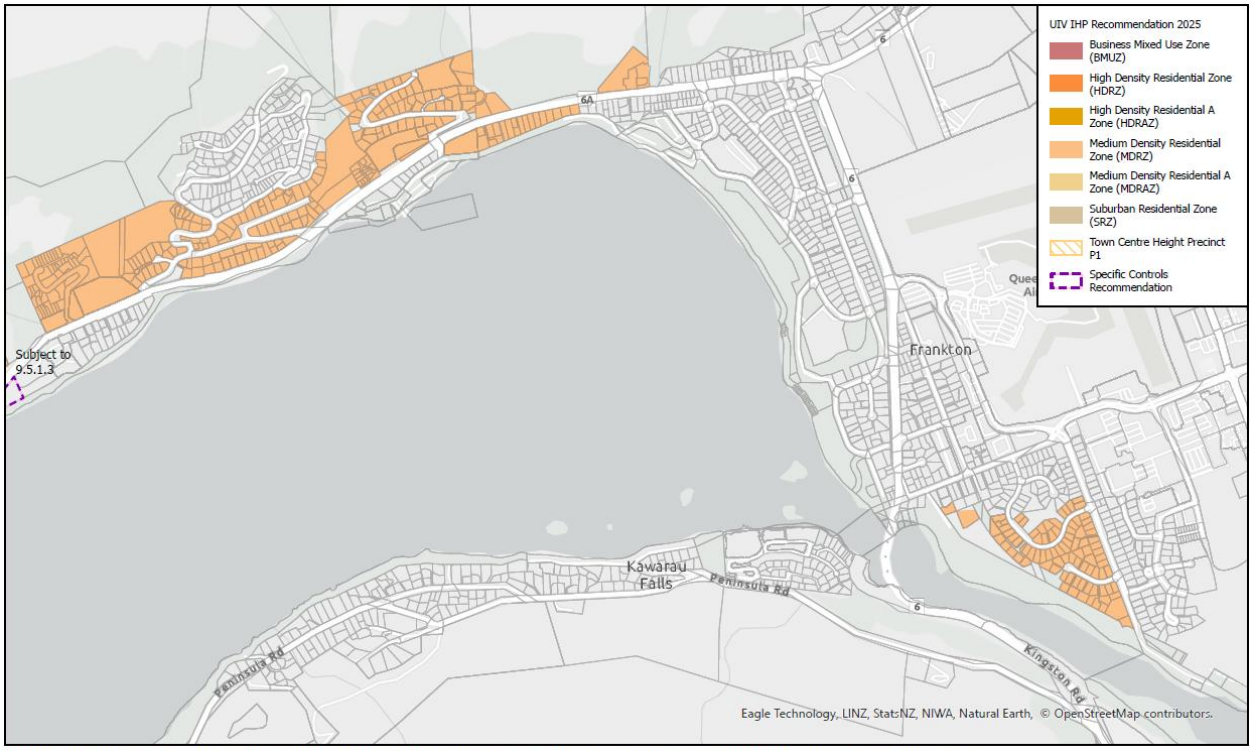
QUEENSTOWN LAKES DISTRICT COUNCIL

Scale: 0 0.5 1 Kilometers

Map Date: 12/12/2025

N

Figure 2-3 – Whakatipu Ward (Frankton Arm and Frankton) UIV IHP Zoning Change Recommendations



The information provided on this map is intended to be general information only. While considerable effort has been made to ensure that the information provided on this map is accurate, current and otherwise adequate in all respects, Queenstown Lakes District Council does not accept any responsibility for content and shall not be responsible for, and excludes all liability, with relation to any claims whatsoever arising from the use of this map and data held within.

QUEENSTOWN LAKES DISTRICT COUNCIL

Scale: 0 0.5 1 Kilometers

Map Date: 12/12/2025

N

2.3 Wānaka Ward UIV Changes

The level of development opportunity has increased significantly in the Wānaka Ward through the Decisions Version UIV from the PDP. Large potential for intensification is enabled across the ward in both central residential and outer suburban residential areas. Greatest intensification is enabled around the Three Parks area, with intensification opportunity, albeit to a lesser scale, also enabled in and around the Wānaka Town Centre.

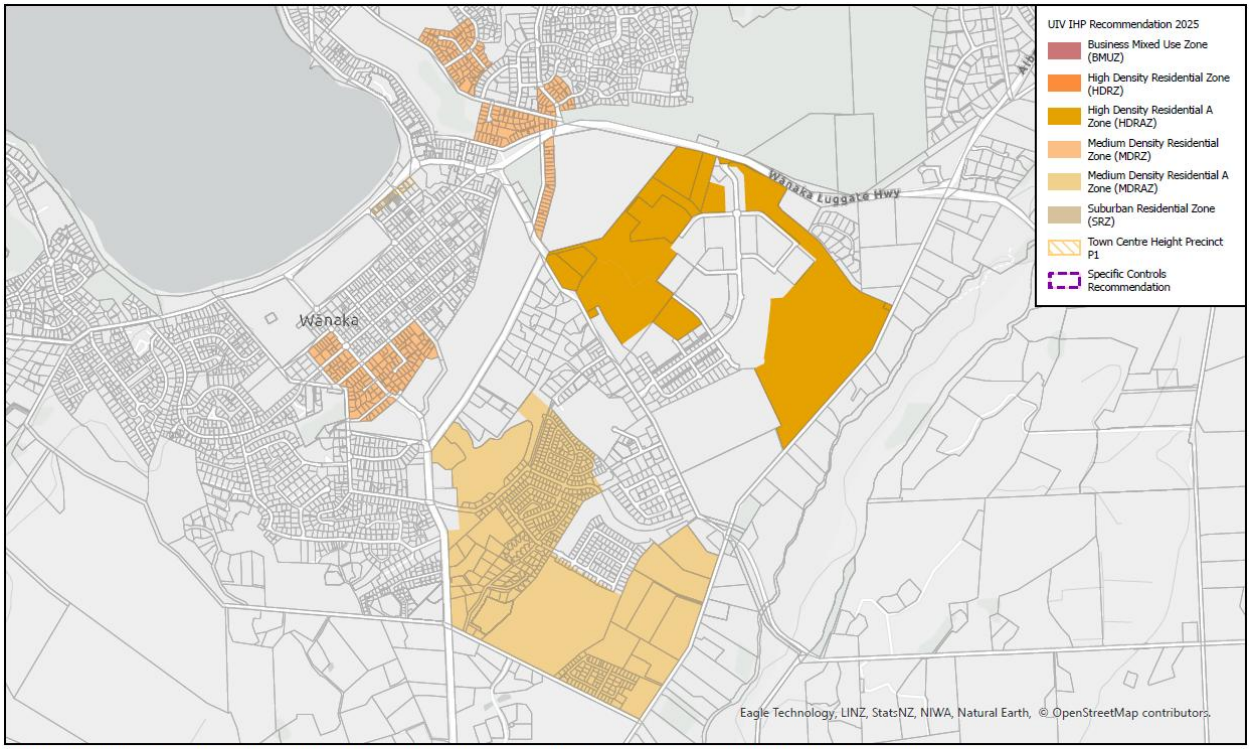
The Decisions Version UIV has introduced significant changes to the enabled geographic patterns of intensification in the Wānaka Ward in comparison to that modelled in the 2025 HBA using the Notified Version UIV, as shown in the map below. The Decisions Version UIV has refocussed the main opportunities for intensification to occur in the Three Parks area, with more limited increases in intensification enabled in the residential zones around the Wānaka Town Centre (in comparison to the Notified Version UIV).

The HDRA zone has been applied across sizeable portions of the areas surrounding the commercial centre in Three Parks, enabling up to at least 5 storeys across this area. The MDRA Zone has been applied across the southern portion of the Wānaka south residential area. Large parts of these are greenfield areas, with the share of capacity in these areas shown in Section 3.

The MDR Zone, enabling a lower level of intensification, has been expanded to cover larger parts residential area surrounding the Wānaka Town Centre. There has also been some increase to the building heights

enabled in the town centre. Although higher than the PDP, the level of intensification enabled in residential areas surrounding the town centre is significantly lower than that of the Notified Version UIV. The Notified Version UIV enabled up to a mixture of intensive terrace housing and low-rise apartments across this area. In comparison, the Decisions Version UIV generally enables a combination of smaller detached dwellings and attached dwellings (both up to two-storeys) at a maximum density of 250m2 land per dwelling.

Figure 2-4 – Wānaka UIV IHP Zoning Change Recommendations



The information provided on this map is intended to be general information only. While considerable effort has been made to ensure that the information provided on this map is accurate, current and otherwise adequate in all respects, Queenstown Lakes District Council does not accept any responsibility for content and shall not be responsible for, and excludes all liability, with relation to any claims whatsoever arising from the use of this map and data held within.

QUEENSTOWN LAKES DISTRICT COUNCIL

Scale: 0 0.75 1.5 Kilometers

Map Date: 12/12/2025

N

3 Residential Capacity

3.1 Plan Enabled Capacity

This section shows the changes in plan enabled capacity to the 2025 HBA (with the Notified Version UIV applied) as a result of applying the Decisions Version UIV in the medium and long-term. Section 3.1.1 measures the changes in plan enabled capacity from that previously modelled with the Notified Version UIV. Section 3.1.2 then provides the updated plan enabled capacity for each ward and reporting area with the Decisions Version UIV applied for the medium and long-term.

3.1.1 Decisions Version UIV Changes to Plan Enabled Capacity

Ward and District-Level Differences in Plan Enabled Capacity

The Decisions Version UIV increases the district's plan enabled capacity by 15,300 net additional dwellings in the medium and long-term[11] from the Notified Version UIV modelled in the 2025 HBA. The medium-term district-level capacity increases by 20%, from 77,100 net additional dwellings (2025 HBA – Notified Version UIV) to 92,300 net additional dwellings in the Decisions Version UIV. The long-term capacity increases by 17% from 92,200 net additional dwellings (2025 HBA with the Notified Version UIV) to 107,500 net additional dwellings in the Decisions Version UIV.

Error! Reference source not found. compares the updated Decisions Version UIV plan enabled capacity outputs (generated by the QLDC growth model) at the ward and district level with the Notified Version UIV capacity originally reported in the 2025 HBA. It shows the capacity produced by each set of outputs and then net differences in capacity between these two sets of modelled outputs.

[11] The Decisions Version UIV changes the capacity in both the medium and long-term from that previously modelled as the area covered by the UIV forms part of both the medium and long-term urban environment. The differences are the same between the medium and long-term as this difference in capacity is applied equally in each time period. Within each set of modelled outputs, capacity in the long-term is higher than that of the medium-term as a result of the further capacity added by the Spatial Plan in the long-term (which remains constant between each set of modelled outputs).

Table 3-1 – Medium and Long-Term Plan Enabled Capacity: 2025 HBA vs. Updated QLDC Growth Model Outputs

Ward	Net Additional Dwelling Capacity				Difference in Plan Enabled Capacity: 2025 HBA vs. 2026 Addendum
	2025 HBA		Updated Capacity		
	Medium-Term: 2023-2033	Long-Term: 2023-2053	Medium-Term: 2023-2033	Long-Term: 2023-2053	
Wanaka Ward					
Existing Urban	18,400	18,400	17,700	17,700	- 700
Greenfield	11,200	19,500	32,900	41,200	21,700
Total Wanaka Ward	**29,600**	**37,900**	**50,600**	**58,900**	**21,000**
Whakatipu Ward					
Existing Urban	34,900	34,900	32,500	32,500	- 2,400
Greenfield	12,500	19,300	9,200	16,000	- 3,300
Total Whakatipu Ward	**47,500**	**54,300**	**41,700**	**48,600**	**- 5,700**
Total Urban Environment					
Existing Urban	53,400	53,400	50,300	50,300	- 3,100
Greenfield	23,700	38,800	42,100	57,200	18,400
Total Urban Environment	**77,100**	**92,200**	**92,300**	**107,500**	**15,300**

Source: QLDC Growth Model, 2025 and 2026.

Overall, the Decisions Version UIV significantly increases plan enabled capacity in the Wānaka Ward, adding capacity for a further net additional 21,000 dwellings from that under the Notified Version UIV. The ward's capacity increases by 71% in the medium-term, from a net additional 29,600 dwellings to a net additional 50,600 dwellings. The long-term plan enabled capacity increases by 55% from 37,900 dwellings to 58,900 dwellings. Wānaka's increased capacity occurs in the greenfield areas as a result of the upzoning across these areas in the Decisions Version UIV as described in Section 2.3, with a decrease in capacity within existing urban areas.

In contrast, the Whakatipu Ward plan enabled capacity decreases by 5,700 dwellings between the Decisions Version UIV and the Notified Version UIV. The medium-term plan enabled net additional dwelling capacity decreases by 12% from 47,500 dwellings in the 2025 HBA, to 41,700 dwellings in the updated outputs with the Decisions Version UIV. The long-term capacity decreases by 11% from 54,300 dwellings in the 2025 HBA to 48,600 dwellings in the updated outputs. The ward's decreases in capacity occur across both greenfield and existing urban areas.

The modelled capacity under each scenario by ward and location type for the short and medium-term is shown graphically in **Error! Reference source not found.**, with the net differences in capacity summarised graphically in **Error! Reference source not found.**.Both the Notified and Decisions versions of the UIV significantly increase the district's medium-term plan enabled capacity from that in the short-term. Overall, the increase in capacity (from the short-term) is larger under the Decisions Version UIV, which has a medium-term (and long-term) plan enabled capacity 15,300 dwellings higher than that enabled under the Notified Version UIV.

While the Decisions Version UIV capacity is higher overall, there are important variations in the net differences in plan enabled capacity between the Decisions and Notified versions of the UIV across each part of the district. The overall net increase occurs due to the significant amount of upzoning applied across the greenfield areas of Wānaka through the Decisions Version UIV in comparison to the Notified Version

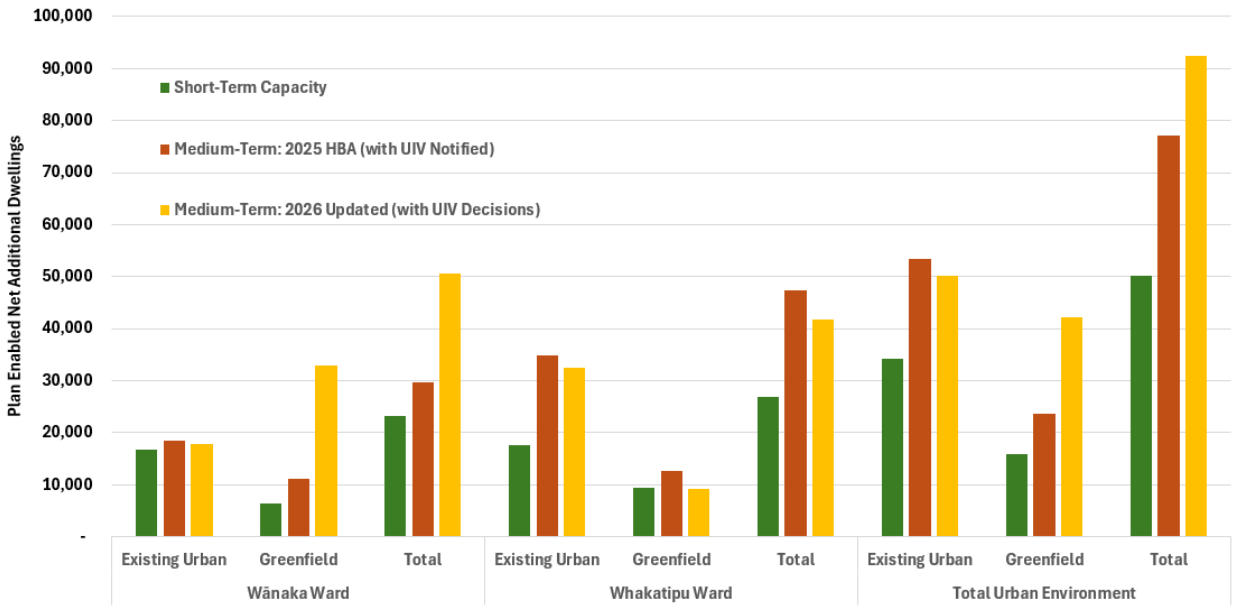
UIV densities. The Decisions Version UIV capacity (+32,900 dwellings) in these greenfield areas is nearly three times that of the Notified Version UIV (+11,200 dwellings), which are both larger than the 6,500 net additional dwellings enabled in the same area in the short-term.

The Decisions Version UIV has a slightly lower plan enabled capacity within Wānaka Ward brownfield areas than the Notified Version UIV, with the QLDC growth model outputs showing only small increases from the short-term.

The updated medium-term modelled plan enabled capacity is lower than the 2025 HBA capacity across both greenfield and brownfield components of the Whakatipu Ward. The Decisions Version UIV still enables sizeable increases in plan enabled capacity in brownfield areas, although at a lower level than that under the Notified Version UIV. The QLDC growth model shows the updated medium-term capacity is around 7% lower in the medium-term (than that Notified),but is still nearly double that enabled in the short-term.

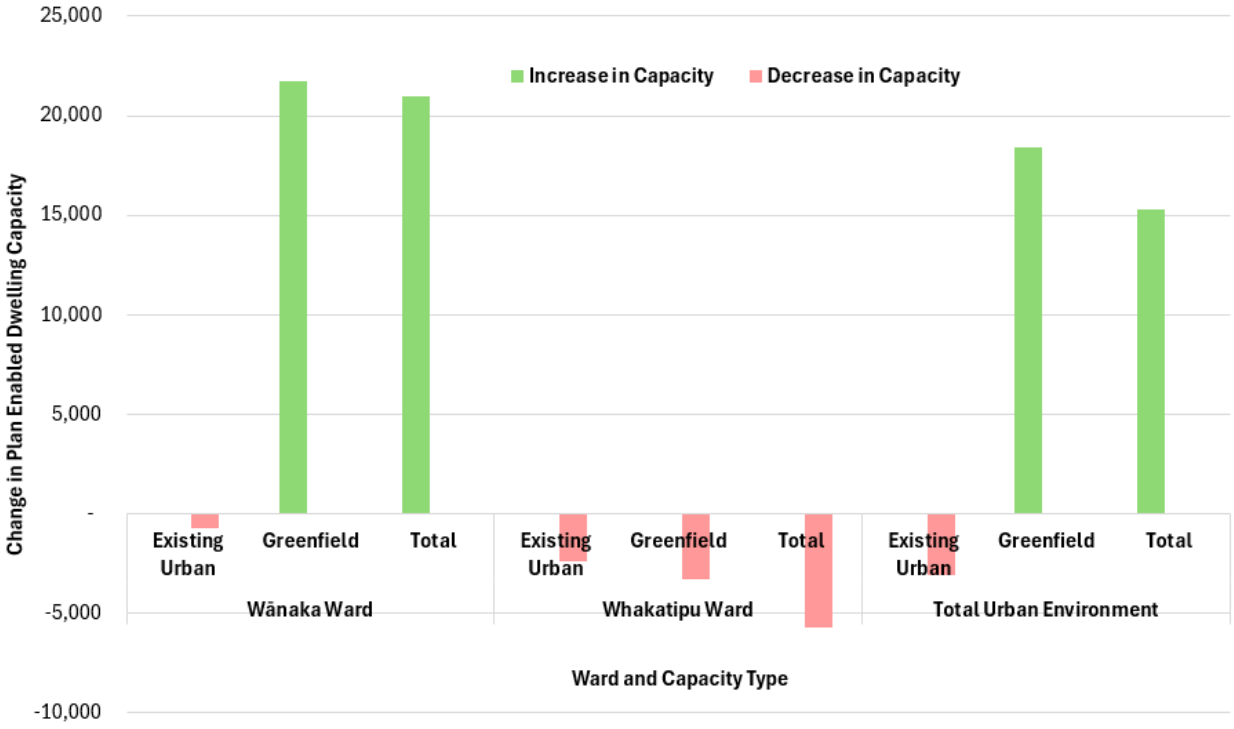
The QLDC growth model updated outputs contain small decreases in the Whakatipu Ward greenfield plan enabled capacity in the medium-term from that enabled in the short-term. This differs significantly to the Notified Version UIV where the ward's greenfield capacity instead increased by 33%.

Figure 3-1 – Short and Medium-Term Plan Enabled Capacity: 2025 HBA vs. Updated QLDC Growth Model Outputs



Source: modelled outputs from QLDC growth model (2025 and 2026).

Figure 3-2 – Net Differences in Medium and Long-Term Plan Enabled Capacity: 2025 HBA vs. Updated QLDC Growth Model Outputs



Source: Net differences in capacity calculated from QLDC growth model outputs (2025 and 2026).

Differences in Plan Enabled Capacity by Reporting Area

The modelled medium and long-term plan enabled capacity by reporting area is shown in **Error! Reference source not found.**, along with the net differences between the 2025 HBA and updated 2026 Addendum (as a result of the differences in capacity between the Notified and Decisions versions of the UIV). The total capacity for each reporting area is shown graphically for the short-term and for each set of outputs for the medium-term in **Error! Reference source not found.**.

The updated medium and long-term capacity is significantly higher than the 2025 HBA in the Wānaka reporting area as a result of the Decisions Version UIV greenfield area upzoning. The brownfield capacity in this reporting area, although still higher than the short-term, is lower than the 2025 HBA due to a significantly lower level of development enabled in the Medium Density Residential Zone applied around the town centre area than the enabled through the Notified Version UIV densities.

The updated modelled capacity is the same or lower across all other reporting areas in comparison to the 2025 HBA medium and long-term outputs. The decreases in medium-term capacity are largest in the Te Tapuae Frankton reporting area (-3,700 dwellings lower than the 2025 HBA), followed by the Arthurs Point (-1,100 dwellings) and Queenstown (-700 dwellings) reporting areas.

The QLDC growth model calculates a sizeable decrease in capacity (-3,300 dwellings) in the Te Tapuae Frankton greenfield areas from that modelled for the 2025 HBA. The resulting medium-term capacity is around 300 dwellings lower than that currently enabled in the short-term. This is mainly due to the reduced

development provisions in the HDR and MDR zoned areas in Quail Rise on the northwestern side of State Highway 6.

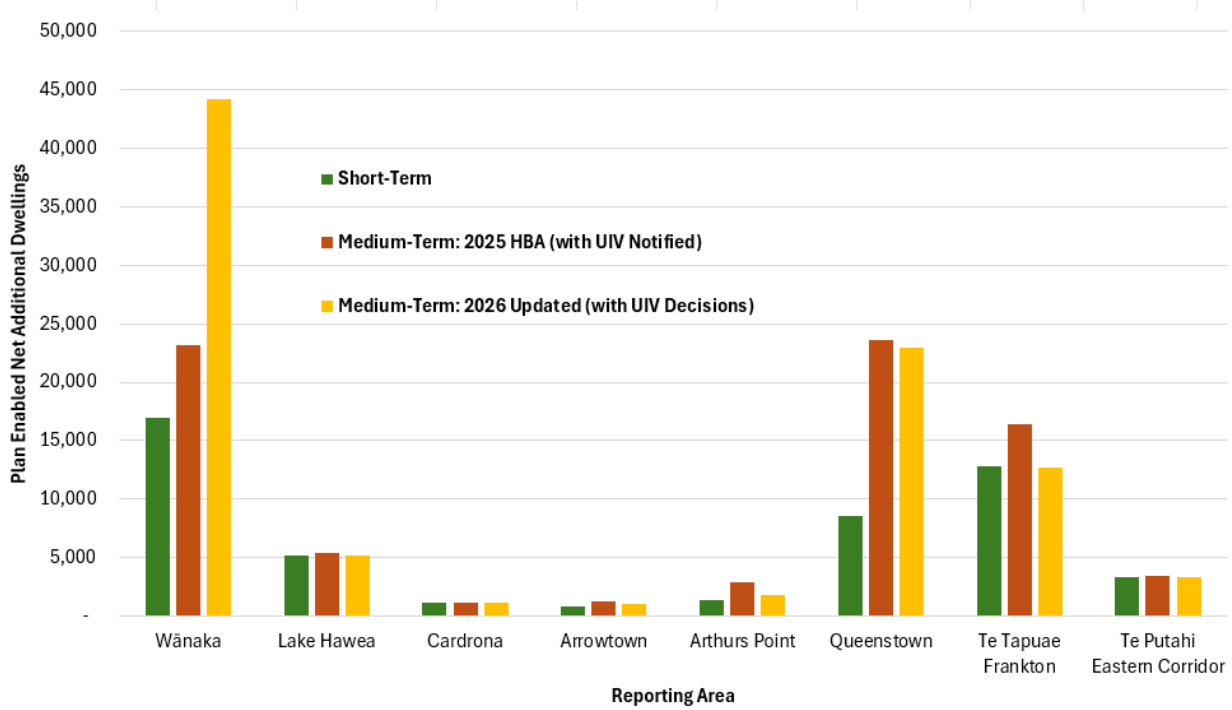
The Decisions Version UIV decreases the development opportunity for intensification from that notified, resulting in reduced levels of brownfield capacity in other reporting areas. Despite these reductions from the 2025 HBA, the medium-term plan enabled capacity remains at or larger to the capacity currently enabled in the short-term in these areas.

Table 3-2 – Medium and Long-Term Plan Enabled Capacity by Reporting Area: 2025 HBA vs. Updated QLDC Growth Model Outputs

Reporting Area	Urban Type	Net Additional Dwelling Capacity				Difference in Plan Enabled Capacity: 2025 HBA vs. 2026 Addendum
		2025 HBA Capacity		Updated 2026 Addendum Capacity		
		Medium-Term: 2023-2033	Long-Term: 2023-2053	Medium-Term: 2023-2033	Long-Term: 2023-2053	
Wānaka	Existing Urban	15,200	15,200	14,500	14,500	- 730
	New Urban	7,900	16,200	29,700	38,000	21,800
Lake Hawea	Existing Urban	3,100	3,100	3,100	3,100	-
	New Urban	2,200	2,200	2,100	2,100	- 110
Cardrona	Existing Urban	60	60	60	60	-
	New Urban	1,100	1,100	1,100	1,100	-
Arrowtown	Existing Urban	1,200	1,200	1,100	1,100	- 120
	New Urban	-	-	-	-	-
Arthurs Point	Existing Urban	2,900	2,900	1,700	1,700	- 1,100
	New Urban	-	-	-	-	-
Queenstown	Existing Urban	22,500	22,500	21,800	21,800	- 670
	New Urban	1,100	1,100	1,100	1,100	- 50
Te Tapuae Frankton	Existing Urban	6,800	6,800	6,400	6,400	- 430
	New Urban	9,600	14,400	6,300	11,100	- 3,300
Te Putahi Eastern Corridor	Existing Urban	1,600	1,600	1,500	1,500	- 60
	New Urban	1,800	3,800	1,800	3,800	-

Source: QLDC Growth Model, 2025 and 2026.

Figure 3-3 – Short and Medium-Term Plan Enabled Capacity by Reporting Area: 2025 HBA vs. Updated QLDC Growth Model Outputs



Source: data sourced from QLDC Growth Model, 2025 and 2026.

3.1.2 Updated Medium and Long-Term Plan Enabled Capacity

The updated plan enabled capacity from the QLDC growth model is shown for each of the district's wards in Table 3-3. It shows the net additional dwelling capacity for each time period, with the medium and long-term including the plan enabled capacity from the Decisions Version UIV provisions (together with capacity enabled by the ODP and Spatial Plan). The short-term capacity remains the same as that reported in the 2025 HBA. The changes in plan enabled capacity between each time-period are shown in Table 3-4.

District and Ward-Level Medium-Term Plan Enabled Capacity

In the medium-term, there is a plan enabled capacity for a net additional 92,300 dwellings across the district's urban environment (up by 15,300 dwellings from 77,100 dwellings under the Notified Version UIV). This equates to nearly four times the existing dwelling base, meaning the provisions could theoretically enable nearly five times the current number of dwellings. Importantly, only a portion of these dwellings are likely to be feasible to development and sustained by the market, as examined in later sections.

The district's plan enabled capacity is more evenly distributed between greenfield and brownfield areas under the Decisions Version UIV. Around 54% (+50,300 dwellings) is located in brownfield areas, and just under half (+42,100 dwellings) in greenfield areas. However, there are important differences in the shares of capacity between the wards, and how this is distributed between brownfield and greenfield areas.

Over half (55%) of the district's medium-term plan enabled capacity occurs within the Wānaka Ward, where around two-thirds is located within greenfield areas. This is due to the large increase in enabled capacity in

the Wānaka Ward greenfield areas through the application of the MDRA and HDRA zones in areas surrounding Three Parks and Wānaka south. In total, the Wānaka Ward has plan enabled capacity for a net additional 50,600 dwellings, with 32,900 of these within the greenfield areas.

Nearly four-fifths (78%) of the district's greenfield capacity is located in the Wānaka Ward. The large amount of greenfield capacity is generated by medium to higher density development opportunity enabled by the Decisions Version UIV across significant portions of the ward's greenfield areas around Wānaka. The wards share of the overall district medium-term greenfield land area is likely to be lower, with the Decisions Version UIV enabling less intensive development opportunities across other greenfield areas.

The Whakatipu Ward contains just under half (45%) of the district's plan enabled capacity in the medium-term, amounting to a net additional 41,700 dwellings. In contrast to the Wānaka Ward, this is focused into brownfield areas within the existing urban environment. These areas contain nearly four-fifths (78%; +32,500 dwellings) of the ward's plan enabled capacity, with the remainder (+9,200 dwellings) in greenfield areas.

The Decisions Version UIV provides significant development opportunity for intensification within the Whakatipu Ward's existing urban areas, resulting in this distribution of capacity. As described in Section 2.2, this is focussed in the central parts of the Ward around the Queenstown Town Centre.

Table 3-4 shows that the Decisions Version UIV also significantly increases the district's plan enabled capacity from the version of the PDP modelled in the short-term (which did not include the UIV). This is seen through the increase in capacity between the short-term (where the PDP is applied) and medium-term. Overall, it nearly doubles the district's plan enabled capacity, with an increase of 84% and further net additional 42,200 dwellings from the net additional 50,200 dwellings enabled in the short-term.

The largest increases in enabled capacity (from the Pre-UIV PDP) occur in the Wānaka Ward, almost entirely due to increased capacity in the greenfield areas. The medium-term provisions theoretically enable around five times the number of dwellings across these areas than under the provisions currently applied in the short-term. The Decisions Version UIV has a much smaller increase in plan enabled capacity, of around 6% (+900 dwellings), in Wānaka's existing urban areas than in greenfield areas. This is mainly due to some increases in height within the Wānaka Town Centre and some spatial expansion to the Medium Density Residential Zone around the town centre to cover areas which currently have a Lower Density Suburban Residential Zone, and the increases in enabled capacity within other suburban residential areas.

Sizeable increases in enabled capacity also occur in the Whakatipu Ward between the short and medium-term with the Decisions Version UIV. The ward's plan enabled capacity increases by a further net additional 15,100 dwellings, from the 17,500 net additional dwellings enabled in the short-term. This increase occurs entirely within existing urban brownfield areas, with a small decrease (-300 dwellings) in greenfield areas. The brownfield increases occur as a result of the opportunity for residential intensification provided by the Decisions Version UIV across the central parts of the ward where the HDRA and MDRA zones are applied.

Table 3-3 – QLDC Growth Model Plan Enabled Capacity by Ward and Time-Period

Ward	Net Additional Dwelling Capacity			Share of Capacity		
	Short-Term: 2023-2026	Medium-Term: 2023-2033	Long-Term: 2023-2053	Short-Term: 2023-2026	Medium-Term: 2023-2033	Long-Term: 2023-2053
Wanaka Ward						
Existing Urban	16,800	17,700	17,700	33%	19%	16%
Greenfield	6,500	32,900	41,200	13%	36%	38%
Total Wanaka Ward	**23,200**	**50,600**	**58,900**	**46%**	**55%**	**55%**
Whakatipu Ward						
Existing Urban	17,500	32,500	32,500	35%	35%	30%
Greenfield	9,500	9,200	16,000	19%	10%	15%
Total Whakatipu Ward	**26,900**	**41,700**	**48,600**	**54%**	**45%**	**45%**
Total Urban Environment						
Existing Urban	34,300	50,300	50,300	68%	54%	47%
Greenfield	15,900	42,100	57,200	32%	46%	53%
Total Urban Environment	**50,200**	**92,300**	**107,500**	**100%**	**100%**	**100%**

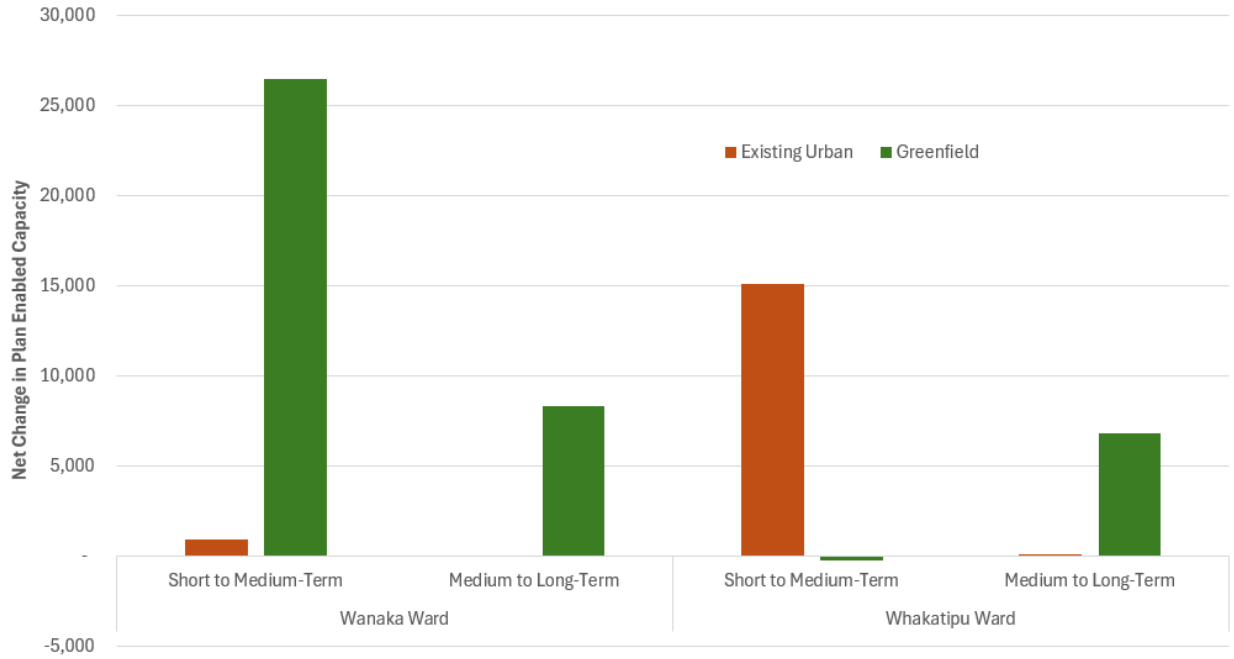
Source: QLDC Growth Model, 2026.

Table 3-4 – Changes in QLDC Growth Model Plan Enabled Capacity between Time Periods

Ward	Net Additional Dwelling Capacity			Net Change in Dwelling Capacity			% Change in Dwelling Capacity		
	Short-Term: 2023-2026	Medium-Term: 2023-2033	Long-Term: 2023-2053	Short-Term to Medium-Term	Medium-Term to Long-Term	Short-Term to Long-Term	Short-Term to Medium-Term	Medium-Term to Long-Term	Short-Term to Long-Term
Wanaka Ward									
Existing Urban	16,800	17,700	17,700	900	-	900	6%	0%	6%
Greenfield	6,500	32,900	41,200	26,400	8,300	34,700	409%	25%	538%
Total Wanaka Ward	**23,200**	**50,600**	**58,900**	**27,400**	**8,300**	**35,700**	**118%**	**16%**	**153%**
Whakatipu Ward									
Existing Urban	17,500	32,500	32,500	15,100	-	15,100	86%	0%	86%
Greenfield	9,500	9,200	16,000	- 300	6,800	6,600	-3%	74%	70%
Total Whakatipu Ward	**26,900**	**41,700**	**48,600**	**14,800**	**6,800**	**21,600**	**55%**	**16%**	**80%**
Total Urban Environment									
Existing Urban	34,300	50,300	50,300	16,000	-	16,000	47%	0%	47%
Greenfield	15,900	42,100	57,200	26,200	15,100	41,300	165%	36%	260%
Total Urban Environment	**50,200**	**92,300**	**107,500**	**42,200**	**15,100**	**57,300**	**84%**	**16%**	**114%**

Source: QLDC Growth Model, 2026.

Figure 3-4 – Summary of QLDC Growth Model Changes in Plan Enabled Capacity by Ward and Location Type



Source: Net changes calculated from QLDC growth model outputs.

Medium-Term Plan Enabled Capacity by Reporting Area

The updated plan enabled capacity for each time period is shown by reporting area in Table 3-5 and Figure 3-5. Table 3-5 also shows the net changes in enabled capacity between each time period for each reporting area. In combination, these show that the Decisions Version UIV shifts the balance of plan enabled capacity within the district toward the Wānaka Ward in the medium-term, in comparison to that enabled under the Notified Version UIV and the Pre-UIV PDP (in the short-term). At a broad spatial scale (when examined by reporting area), it also further concentrates the plan enabled capacity into the more central parts of each ward, although there are important differences in the distribution of this capacity within each reporting area between the wards.

The updated plan enabled capacity in the Wānaka Ward is heavily concentrated into the Wānaka reporting area, which contains 87% of the ward's medium-term plan enabled capacity. Increases in the ward's plan enabled capacity from the short-term as a result of the Decisions Version UIV occur almost entirely within the Wānaka reporting area mainly due to the upzoning across the greenfield areas. As a result, the Wānaka reporting area contains around half (48%) of the district's overall medium-term plan enabled capacity.

The remaining 13% of the ward's capacity is distributed between the Lake Hawea (+5,200 dwellings) and Cardrona (+1,200 dwellings) reporting areas. The Decisions Version UIV enables very little increase in plan enabled capacity in the medium-term in these reporting areas from that originally modelled in the short-term under the PDP (which did not include the UIV). There is a small net increase (+100 dwellings) in the Lake Hawea reporting area, and no change in Cardrona.

Just over half (52%) of the Whakatipu Ward's medium-term plan enabled capacity occurs in the Queenstown reporting area. The UIV theoretically enables a net additional 22,900 dwellings in this

reporting area, meaning that it contains one-quarter (25%) of the district's overall plan enabled capacity. The Decisions Version UIV increases in plan enabled capacity for the Whakatipu Ward are heavily concentred into the Queenstown reporting area, where they occur almost entirely through increased opportunity for residential intensification of existing brownfield areas.

The rest of the Whakatipu Ward's medium-term plan enabled capacity is distributed across the other reporting areas as shown in Table 3-5 and Figure 3-5. The largest of these is Te Tapuae Frankton, which has a medium-term plan enabled capacity for a net additional 12,700 dwellings. This reporting area covers a sizeable portion of the urban environment, with capacity distributed relatively evenly between greenfield and brownfield areas. With a net additional 6,300 dwellings enabled in greenfield areas, it contains over two-thirds (68%) of the ward's greenfield capacity.

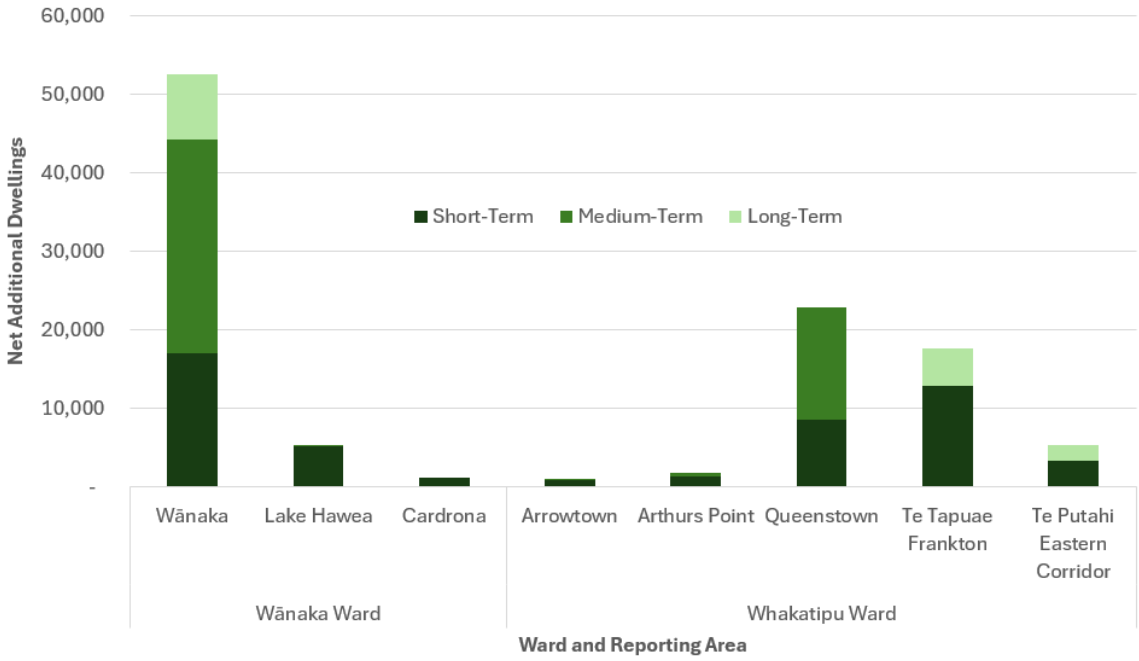
The Decisions Version UIV enables only minor changes in plan enabled capacity in the Whakatipu Ward in areas outside of the Queenstown reporting area from that of the PDP. Table 3-5 shows that small increases in capacity are enabled in the brownfield areas of Arthurs Point, Arrowtown and the Frankton part of the Te Tapuae / Frankton reporting area. While the net changes in capacity in these areas are small, the changes to the level of development opportunity (type and size of dwellings enabled) may be more significant within the local context in comparison to existing patterns of development. The QLDC growth model also calculates a net decrease of around 300 dwellings in greenfield capacity within the Te Tapuae / Frankton reporting area.

Table 3-5 – QLDC Growth Model Plan Enabled Capacity by Reporting Area and Time-Period

Reporting Area	Location Type	Net Additional Dwelling Capacity			Net Change in Dwelling Capacity		
		Short-Term: 2023-2026	Medium-Term: 2023-2033	Long-Term: 2023-2053	Short-Term to Medium-Term	Medium-Term to Long-Term	Short-Term to Long-Term
Wānaka	Existing Urban	13,600	14,500	14,500	920	-	920
	Greenfield	3,300	29,700	38,000	26,400	8,300	34,700
Lake Hawea	Existing Urban	3,100	3,100	3,100	-	-	-
	Greenfield	2,000	2,100	2,100	80	-	80
Cardrona	Existing Urban	60	60	60	-	-	-
	Greenfield	1,100	1,100	1,100	-	-	-
Arrowtown	Existing Urban	860	1,100	1,100	210	-	210
	Greenfield	-	-	-	-	-	-
Arthurs Point	Existing Urban	1,400	1,700	1,700	350	-	350
	Greenfield	-	-	-	-	-	-
Queenstown	Existing Urban	7,400	21,800	21,800	14,400	-	14,400
	Greenfield	1,100	1,100	1,100	20	-	20
Te Tapuae Frankton	Existing Urban	6,300	6,400	6,400	130	-	130
	Greenfield	6,600	6,300	11,100	-270	4,900	4,600
Te Putahi Eastern Corridor	Existing Urban	1,500	1,500	1,500	-10	10	-10
	Greenfield	1,800	1,800	3,800	-	2,000	2,000

Source: QLDC Growth Model, 2026.

Figure 3-5 – QLDC Growth Model Plan Enabled Capacity by Reporting Area and Time-Period



Source: data sourced from QLDC growth model outputs.

District and Ward-Level Long-Term Plan Enabled Capacity

The district's plan enabled capacity increases a further 16% in the long-term as a result of the additional areas added by the Spatial Plan in the long-term. These areas enable a net additional 15,100 dwellings across the districts in the long-term. Together with the capacity enabled by the Decisions Version UIV (and ODP Special Zones) in the medium-term, this amounts to a total plan enabled capacity for a net additional 107,500 dwellings across the district's urban environment in the long-term. This is over double the amount of capacity currently enabled under the PDP in the short-term across the district.

The additional capacity enabled in the district's environment by the Spatial Plan remains consistent with that reported in the 2025 HBA as these areas are outside of the spatial extent of the Decisions Version UIV. In short, the Spatial Plan greenfield areas provide capacity for a further 8,300 dwellings in the Wānaka Ward and 6,800 dwellings in the Whakatipu Ward in the long-term.

Although the additional long-term capacity remains consistent with the 2025 HBA, the distribution of total long-term capacity across the full current and future urban environment differs due to the changes in the medium-term from the Decisions Version UIV. Table 3-3 shows that the distribution of plan enabled capacity between the wards in the long-term remains similar to that of the medium-term where over half (55%) of the district's capacity occurs in the Wānaka Ward. The share of this capacity occurring in greenfield areas increases with the additional areas from the Spatial Plan, with over half (53%) of the district's long-term capacity in greenfield areas.

Table 3-5 and Figure 3-5 show that the largest increases in capacity in the long-term occur in the Wānaka reporting area, followed by the Te Tapuae Frankton and Te Pūtahi Eastern Corridor reporting areas. This continues to focus capacity into the central parts of the Wānaka Ward in the long-term, although with a pattern of spatially expanding this main urban area. The additional long-term capacity is added through further urban expansion in less central parts of the Whakatipu Ward, providing capacity to meet future growth together with intensification opportunity in central parts of the ward.

3.2 Infrastructure-Ready Capacity

The updated infrastructure-ready capacity from the QLDC growth model is shown in Table 3-6 for the medium and long-term (with short-term capacity remaining the same as the 2025 HBA). The table shows the net additional dwellings that are able to be supported by residual capacity remaining within the district's combined infrastructure networks[12].

At the total ward and district levels, there is very little difference in infrastructure-ready capacity to that reported from the QLDC growth model in the 2025 HBA as the infrastructure capacity input limits remain the same[13]. In total, residual capacity within the district's infrastructure networks amount to an additional 17,300 dwellings in the medium-term, increasing to a net additional 33,500 dwellings in the long-term.

The main differences to the 2025 HBA occur within the Wānaka Ward, where the QLDC growth model reallocates residual infrastructure capacity between the brownfield and greenfield areas. The large increases in plan enabled capacity within the greenfield areas increase the medium-term infrastructure-ready capacity in these areas to 4,000 dwellings (up from 3,200 dwellings in the 2025 HBA), with a corresponding reduction in brownfield infrastructure-ready capacity to 2,300 dwellings (down from 3,100 dwellings in the 2025 HBA). The reallocation of Wānaka Ward infrastructure-ready capacity increases between these two areas in the long-term, increasing it to 9,400 dwellings in greenfield areas (up from 8,200 dwellings in the HBA), with corresponding decreases to 5,700 dwellings in brownfield areas (down from 6,900 dwellings).

There are only minor changes in the allocation of infrastructure-ready capacity between brownfield and greenfield areas within the Whakatipu Ward from that reported in the 2025 HBA.

[12] Refer to the 2025 HBA for the technical approach to infrastructure capacity.

[13] Any differences arise through a reallocation by the QLDC growth model of these same limits across the updated plan enabled capacity.

Table 3-6 – Combined Infrastructure Network Net Additional Dwelling Capacity

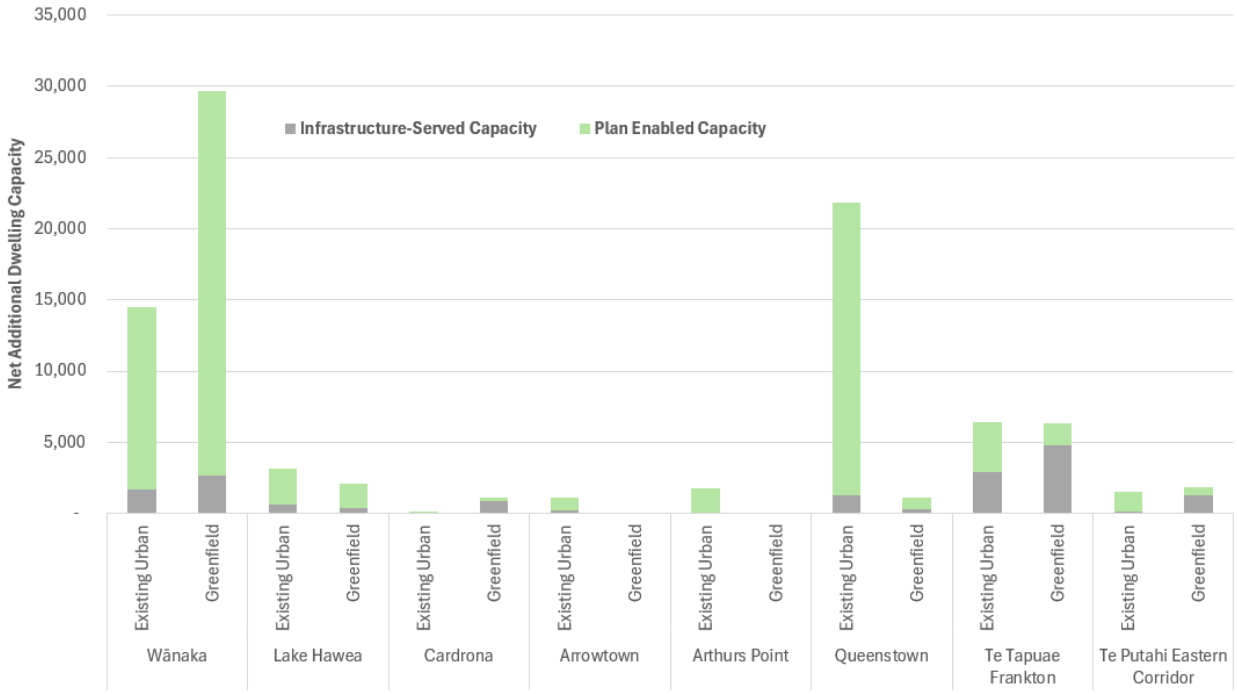
Ward	Infrastructure Net Additional Dwelling Capacity			Share of Infrastructure Capacity			Infrastructure Capacity as Share of Plan Enabled Capacity		
	Short-Term: 2023-2026	Medium-Term: 2023-2033	Long-Term: 2023-2053	Short-Term: 2023-2026	Medium-Term: 2023-2033	Long-Term: 2023-2053	Short-Term: 2023-2026	Medium-Term: 2023-2033	Long-Term: 2023-2053
Wanaka Ward									
Existing Urban	570	2,300	5,700	29%	14%	17%	3%	13%	32%
Greenfield	1,100	4,000	9,400	58%	23%	28%	17%	12%	23%
Total Wanaka Ward	**1,700**	**6,300**	**15,100**	**87%**	**37%**	**45%**	**7%**	**13%**	**26%**
Whakatipu Ward									
Existing Urban	30	4,600	5,400	1%	27%	16%	0%	14%	17%
Greenfield	220	6,300	13,100	11%	37%	39%	2%	69%	82%
Total Whakatipu Ward	**240**	**10,900**	**18,500**	**13%**	**63%**	**55%**	**1%**	**26%**	**38%**
Total Urban Environment									
Existing Urban	590	7,000	11,100	31%	40%	33%	2%	14%	22%
Greenfield	1,300	10,300	22,500	69%	60%	67%	8%	25%	39%
Total Urban Environment	**1,900**	**17,300**	**33,500**	**100%**	**100%**	**100%**	**4%**	**19%**	**31%**

Source: QLDC Growth Model, 2026.

The infrastructure-ready capacity in comparison to the updated plan enabled capacity by reporting area is shown for the medium-term in Figure 3-6, and for the long-term in Figure 3-7. The total infrastructure-ready capacity by reporting area remains very similar total that reported in the 2025 HBA for the medium and long-term as a result of the same infrastructure network capacity limits applied in the model. Consistent with the 2025 HBA, infrastructure limits by location have a strong influence on the amount of capacity produced by the QLDC growth model, where the largest amount of infrastructure capacity occurs in the Te Tapuae Frankton and Wānaka reporting areas.

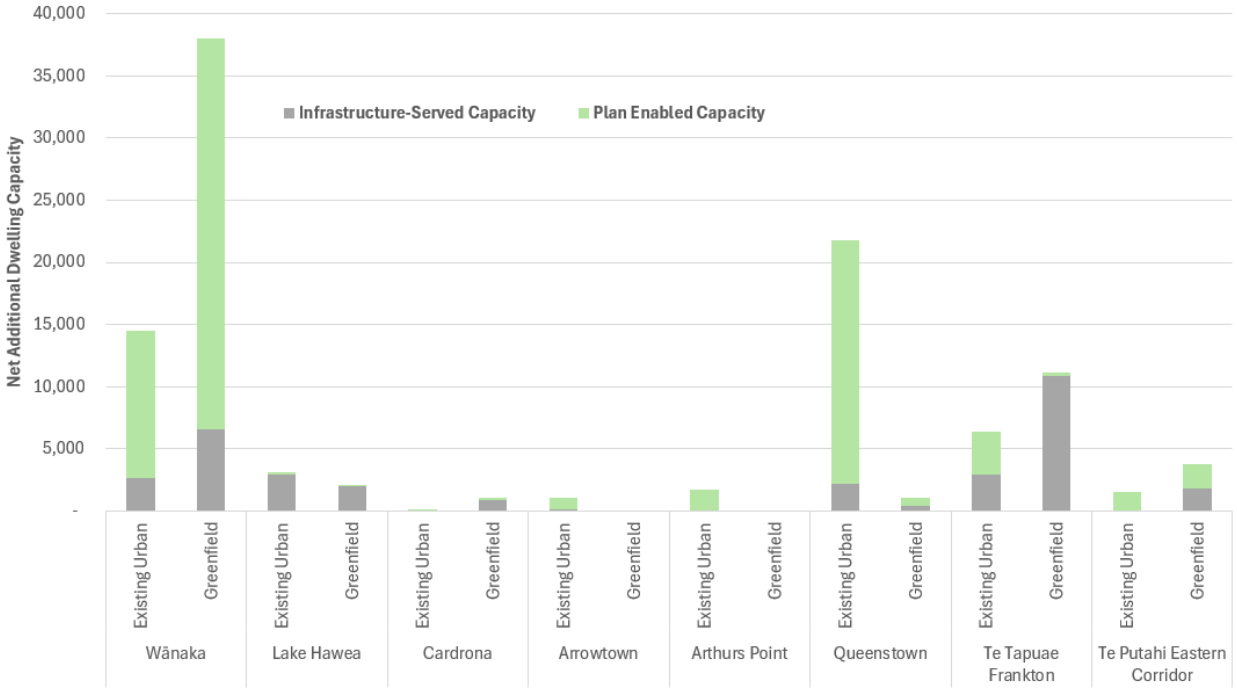
While the total infrastructure-ready capacity by reporting area remains largely unchanged from the 2025 HBA, it corresponds to different proportions of the plan enabled capacity due to the updated modelled capacity outputs. In the long-term, decreases in the Te Tapuae Frankton plan enabled greenfield capacity mean that the infrastructure-ready capacity is very close to the amount of capacity enabled under the plan.

Figure 3-6 – Medium-Term Residual Infrastructure and Plan Enabled Capacity by Reporting Area



Source: data from QLDC Growth Model, 2026.

Figure 3-7 – Long-Term Residual Infrastructure and Plan Enabled Capacity by Reporting Area



Source: data from QLDC Growth Model, 2026.

3.3 Serviced, Feasible and Reasonably Expected Capacity

The QLDC growth model does not model any change to the serviced, commercially feasible and reasonably expected to be realised (RER) capacity across the district's urban environment as a result of the changes in plan enabled capacity. The reasonably expected capacity under the Decisions Version UIV remains the same as that modelled under the 2025 HBA where the Notified Version UIV has been applied. Infrastructure constraints have a strong influence on the capacity expected to be realised under both sets of provisions.

In the medium-term, there is an RER capacity of 15,100 net additional dwellings for the district's urban environment overall. Between half and two-thirds (61%; +9,200 dwellings) of the capacity is in the Whakatipu Ward where it is concentrated into attached dwellings, particularly within greenfield areas. The district's RER capacity nearly doubles in the long-term, reaching a total net additional 29,700 dwellings. The increase in capacity is relatively evenly distributed between the ward's, with a slightly higher share occurring in the Wānaka Ward.

The QLDC growth model shows that both the total number of dwellings and the types of dwellings (attached vs. detached) remain the same, suggesting that the enabled capacity in parts of the district is expected to be taken up at densities within the range of development options enabled under both sets of provisions[14].

The updated results also suggest that the QLDC growth model does not expect any changes in market response to the changes in plan enabled capacity in other parts of the district. This includes the large upzoning applied across Wānaka's greenfield areas, with the resulting dwelling capacity remaining focused toward detached dwellings.

The ward level summary tables and reporting area graphs are presented below. The medium-term RER is shown in Table 3-7 and Figure 3-8; and the long-term RER is shown in

Table 3-8 and Figure 3-9. Although RER remains the same as the 2025 HBA, the final columns in each table provide the updated shares of capacity expected to be realised[15].

[14] Decreases in the enabled capacity across parts of the urban environment (between the UIV Notified and Decisions versions) still produce a level of capacity above the densities expected to occur by the QLDC growth model.

[15] The summary of RER capacity remains unchanged from that provided in Section 10 of the 2025 HBA.

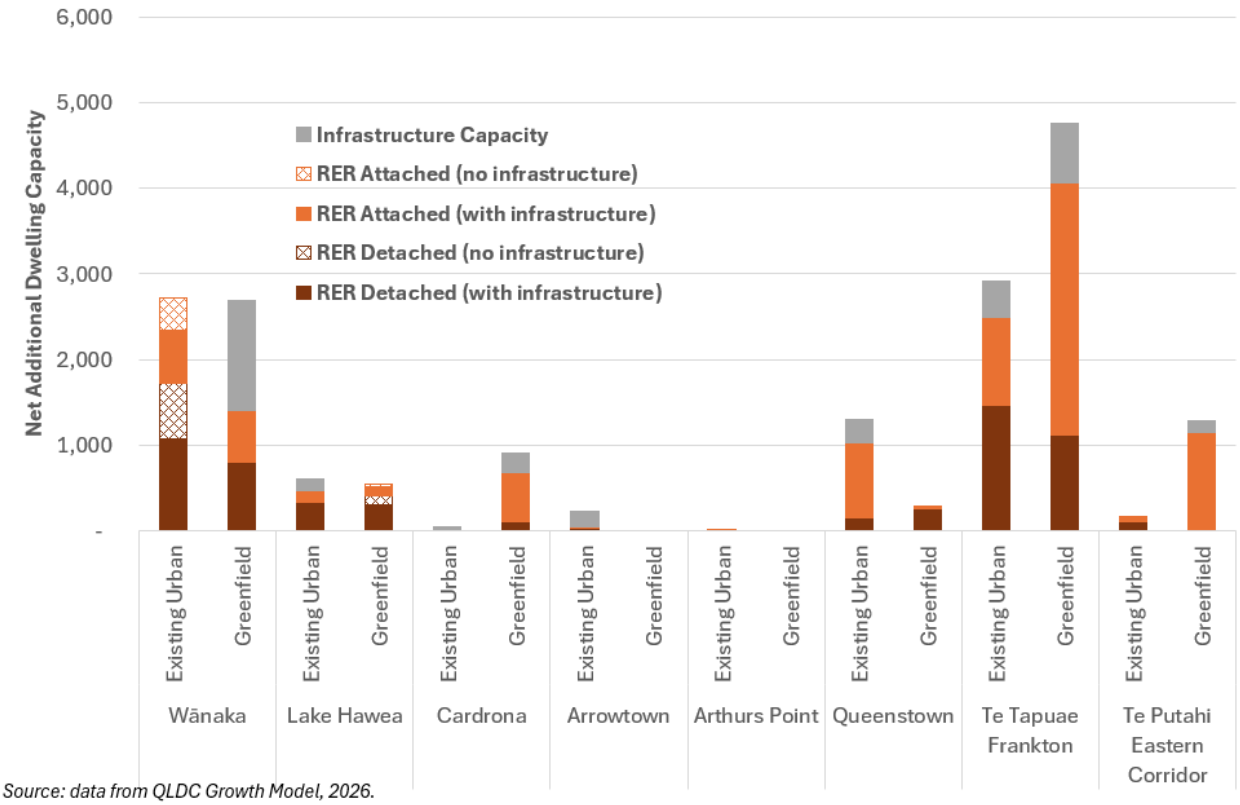
Medium-Term RER Capacity

Table 3-7 – Summary of Medium-Term RER Dwelling Capacity by Ward

Ward	RER Capacity (Net Additional Dwellings)			Share of RER Capacity			RER as Share of Capacity Type	
	Detached	Attached	Total	Detached	Attached	Total	Infrastructure Capacity	Plan Enabled Capacity
	RER BASELINE SCENARIO							
Wanaka Ward								
Existing Urban	2,100	1,100	**3,200**	14%	7%	21%	136%	18%
Greenfield	1,300	1,300	**2,600**	9%	9%	18%	66%	8%
Total Wanaka Ward	**3,400**	**2,400**	**5,800**	**22%**	**16%**	**39%**	**92%**	**11%**
Whakatipu Ward								
Existing Urban	1,800	2,000	**3,700**	12%	13%	25%	81%	11%
Greenfield	1,400	4,100	**5,500**	9%	27%	37%	87%	60%
Total Whakatipu Ward	**3,100**	**6,100**	**9,200**	**21%**	**40%**	**61%**	**84%**	**22%**
Total Urban Environment								
Existing Urban	3,800	3,100	**6,900**	25%	21%	46%	99%	14%
Greenfield	2,700	5,400	**8,100**	18%	36%	54%	79%	19%
Total Urban Environment	**6,500**	**8,500**	**15,100**	**43%**	**57%**	**100%**	**87%**	**16%**

Source: QLDC Growth Model, 2026.

Figure 3-8 – Medium-Term RER and Infrastructure Capacity by Reporting Area



Source: data from QLDC Growth Model, 2026.

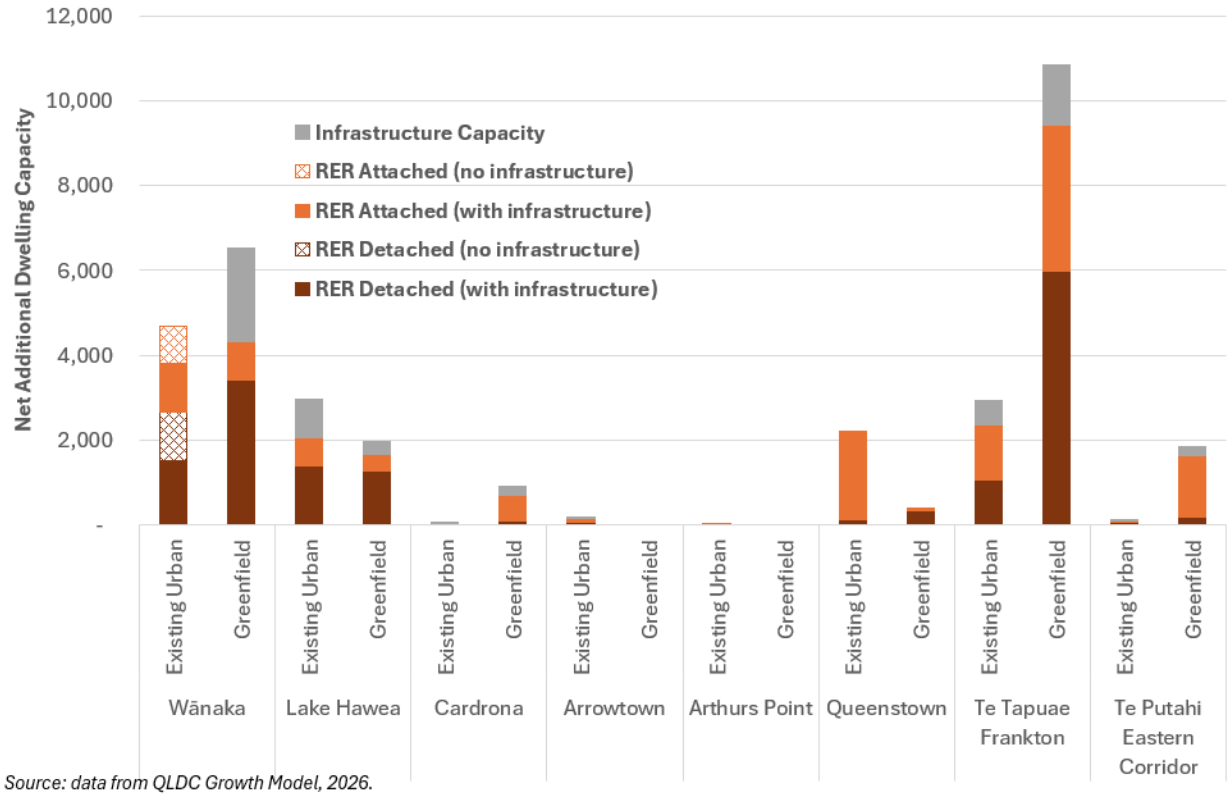
Long-Term RER Capacity

Table 3-8 – Summary of Long-Term RER Dwelling Capacity by Ward

Ward	RER Capacity (Net Additional Dwellings)			Share of RER Capacity			RER as Share of Capacity Type	
	Detached	Attached	Total	Detached	Attached	Total	Infrastructure Capacity	Plan Enabled Capacity
	RER BASELINE SCENARIO							
Wanaka Ward								
Existing Urban	4,100	2,700	**6,800**	14%	9%	23%	119%	38%
Greenfield	4,800	1,900	**6,700**	16%	6%	23%	71%	16%
Total Wanaka Ward	**8,800**	**4,600**	**13,500**	**30%**	**16%**	**45%**	**89%**	**23%**
Whakatipu Ward								
Existing Urban	1,300	3,500	**4,800**	4%	12%	16%	89%	15%
Greenfield	6,500	5,000	**11,500**	22%	17%	39%	88%	72%
Total Whakatipu Ward	**7,800**	**8,400**	**16,200**	**26%**	**28%**	**55%**	**88%**	**33%**
Total Urban Environment								
Existing Urban	5,400	6,200	**11,500**	18%	21%	39%	105%	23%
Greenfield	11,300	6,900	**18,200**	38%	23%	61%	81%	32%
Total Urban Environment	**16,600**	**13,100**	**29,700**	**56%**	**44%**	**100%**	**89%**	**28%**

Source: QLDC Growth Model, 2026.

Figure 3-9 – Long-Term RER and Infrastructure Capacity by Reporting Area



Source: data from QLDC Growth Model, 2026.

4 Residential Sufficiency

The sufficiency of capacity to accommodate projected growth in the district's urban environment is assessed through comparing the RER capacity with the projected demand for dwellings (incl. a margin). The net sufficiency remains the same as the 2025 HBA. This is because the QLDC growth model RER capacity and demand remain unchanged, producing the same net sufficiency across each ward and reporting area in the district.

The QLDC growth model projects a surplus of capacity of 6,100 dwellings across the district's urban environment overall in the medium-term. It also projects capacity surpluses for each ward overall, with the largest (+4,400 dwellings) in the Whakatipu Ward, and a smaller, albeit sizeable, surplus of 1,700 dwellings in the Wānaka Ward.

There continues to be a surplus in capacity at the district-level, and within each ward overall, in the long-term. The surplus becomes smaller, but is still sizeable at a net 2,800 dwellings. The QLDC growth model indicates that changes in the size of the projected surpluses are generally closely tied to changes in the level of infrastructure capacity when considered at the reporting area level.

This section provides the updated reporting area graphs (Figure 4-1 and Figure 4-2) and tables (Table 4-3 and Table 4-6) of the sufficiency position in comparison to the updated plan enabled and infrastructure-served capacity (which have changed with the updated outputs of the Decisions Version UIV). For completeness, it also provides the ward level (Table 4-1 and Table 4-4) and reporting area level (Table 4-2 and Table 4-5) tables of net sufficiency for the medium and long-term (although these remain unchanged from the 2025 HBA).

This section focusses on the net sufficiency position in comparison to the updated plan enabled capacity. A further discussion on the sufficiency of capacity across the district is contained in Section 11 of the HBA and remains unchanged with the Decisions Version UIV.

4.1 Medium-Term Sufficiency

Figure 4-1 shows that the aggregate level of updated capacity enabled by the plan in the medium-term remains large in comparison to projected demand across all reporting areas in the district. However, further detail on the types of capacity and levels of enabled development is needed to understand how this is likely to align with the levels of demand in different of the market.

Although the Decisions Version UIV significantly increases the plan enabled capacity in Wānaka's greenfield areas, the QLDC growth model projects that capacity shortfalls are still expected to occur in the ward's greenfield areas. These are likely to be the result of modelled take-up of infrastructure capacity, with no identified feasibility constraint in these areas. The model allocation of infrastructure capacity is being investigated further by QLDC and will be addressed in subsequent rounds of modelling updates.

The sufficiency of capacity in the Whakatipu Ward also remains unchanged in the medium-term despite the reductions in plan enabled capacity in the Decisions Version UIV from the 2025 HBA. These occur in areas where infrastructure constraints limit the RER capacity (and therefore, sufficiency) ahead of changes in plan enabled capacity. This is seen in Figure 4-1 and Table 4-3 where plan enabled capacity remains significantly above the infrastructure-ready capacity.

Table 4-1 – Medium-Term Sufficiency by Ward, Location Type and Dwelling Type: Baseline RER Scenario

	Demand (incl. Margin)			RER Capacity (Baseline Scenario)			Net Sufficiency		
Ward	**Detached**	**Attached**	**Total**	**Detached**	**Attached**	**Total**	**Detached**	**Attached**	**Total**
Wanaka Ward									
Existing Urban	570	290	**850**	2,100	1,100	**3,200**	1,500	830	**2,300**
Greenfield	2,500	780	**3,300**	1,300	1,300	**2,600**	-1,200	540	**-610**
Total Wanaka Ward	**3,000**	**1,100**	**4,100**	**3,400**	**2,400**	**5,800**	**340**	**1,400**	**1,700**
Whakatipu Ward									
Existing Urban	680	960	**1,600**	1,800	2,000	**3,700**	1,100	1,000	**2,100**
Greenfield	2,300	930	**3,200**	1,400	4,100	**5,500**	-920	3,200	**2,300**
Total Whakatipu Ward	**3,000**	**1,900**	**4,900**	**3,100**	**6,100**	**9,200**	**160**	**4,200**	**4,400**
Total Urban Environment									
Existing Urban	1,200	1,300	**2,500**	3,800	3,100	**6,900**	2,600	1,900	**4,400**
Greenfield	4,800	1,700	**6,500**	2,700	5,400	**8,100**	-2,100	3,700	**1,600**
Total Urban Environment	**6,000**	**3,000**	**9,000**	**6,500**	**8,500**	**15,100**	**490**	**5,600**	**6,100**

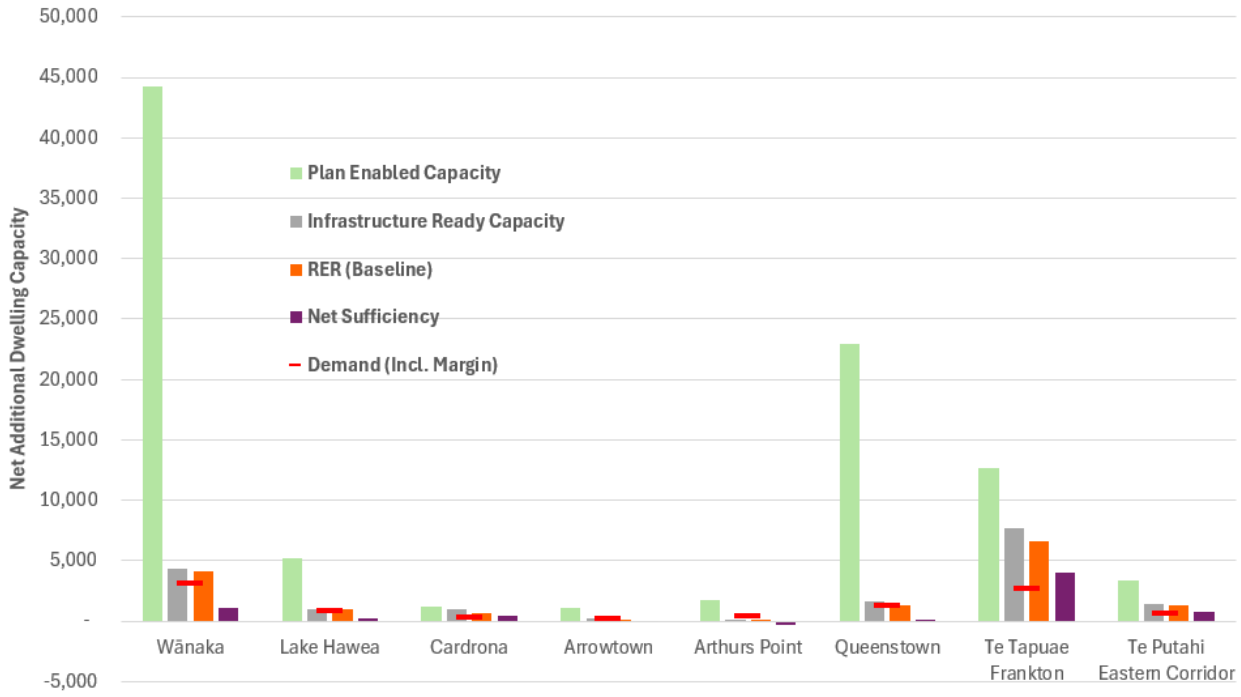
Source: QLDC Growth Model, 2026.

Table 4-2 – Medium-Term Sufficiency by Reporting Area, Location Type and Dwelling Type: Baseline RER Scenario

		Demand (incl. Margin)			RER Capacity (Baseline Scenario)			Net Sufficiency		
Reporting Area	**Location Type**	**Detached**	**Attached**	**Total**	**Detached**	**Attached**	**Total**	**Detached**	**Attached**	**Total**
Wānaka	Existing Urban	460	240	700	1,700	1,000	2,700	1,300	760	**2,000**
	Greenfield	1,800	570	2,400	790	610	1,400	-1,000	40	**-960**
Lake Hawea	Existing Urban	100	50	160	340	130	470	240	70	**310**
	Greenfield	480	150	630	420	130	550	-70	-20	**-80**
Cardrona	Existing Urban	-	-	-	-	-	-	-	-	**-**
	Greenfield	190	60	260	110	580	690	-90	520	**430**
Arrowtown	Existing Urban	50	80	130	30	10	40	-20	-60	**-90**
	Greenfield	-	-	-	-	-	-	-	-	**-**
Arthurs Point	Existing Urban	140	200	340	-	-	10	-140	-190	**-330**
	Greenfield	-	-	-	-	-	-	-	-	**-**
Queenstown	Existing Urban	410	570	980	150	880	1,000	-260	310	**50**
	Greenfield	190	80	270	260	40	290	70	-40	**30**
Te Tapuae Frankton	Existing Urban	80	110	190	1,500	1,000	2,500	1,400	920	**2,300**
	Greenfield	1,700	690	2,400	1,100	2,900	4,100	-610	2,300	**1,700**
Te Putahi Eastern Corridor	Existing Urban	-	10	10	110	50	170	110	50	**160**
	Greenfield	400	160	560	10	1,100	1,100	-390	970	**590**

Source: QLDC Growth Model, 2026.

Figure 4-1 – Summary of Capacity and Demand by Reporting Area: Medium-Term



Source: data from QLDC Growth Model, 2026.

Table 4-3 – Summary of Capacity, Demand and Net Sufficiency by Reporting Area: Medium-Term

Reporting Area	Demand (incl. margin)	QLDC Growth Model Capacity			Net Sufficiency
		Plan Enabled	Infrastructure-Ready	RER	
Wānaka	3,100	44,200	4,400	4,100	1,100
Lake Hawea	800	5,200	1,000	1,000	200
Cardrona	300	1,200	900	700	400
Arrowtown	100	1,100	200	40	- 90
Arthurs Point	300	1,700	10	10	- 300
Queenstown	1,200	22,900	1,600	1,300	80
Te Tapuae Frankton	2,600	12,700	7,700	6,600	4,000
Te Putahi Eastern Corridor	600	3,300	1,400	1,300	700

Source: QLDC Growth Model, 2026.

4.2 Long-Term Sufficiency

Capacity shortfalls in Wānaka's greenfield areas are still projected to occur in the long-term despite the large increases in plan enabled capacity in these areas with the Decisions Version UIV. Figure 4-2 and Table 4-6 show that the Wānaka reporting area shortfall is likely to be influenced by infrastructure limitations in this location where RER capacity is closely aligned with infrastructure capacity, with the increases in plan enabled capacity above these levels.

Other reporting areas in the Wānaka Ward have overall projected surpluses in capacity in the long-term, with the largest of these in Lake Hawea as a result of further infrastructure capacity in this location. While these areas have projected surpluses, there are small shortfalls in greenfield capacity in Lake Hawea despite these areas having surplus infrastructure capacity; and in detached dwellings in greenfield areas of Cardrona.

The graph and Table 4-6 show that the infrastructure limits also continue to determine the sufficiency of capacity in other parts of the district ahead of the changes to plan enabled capacity as a result of the Decisions Version UIV. Despite the reductions in plan enabled capacity in parts of the Whakatipu Ward, the level of plan enabled capacity remains above these infrastructure limits. At an aggregated level, the updated plan enabled capacity (with the incorporation of the Decisions Version UIV) remains significantly above the level of demand across the reporting areas of the Whakatipu Ward.

The Whakatipu Ward capacity surplus (+1,600 dwellings in the long-term), continues to be driven by sizeable surpluses in the Te Tapuae Frankton reporting area, which has a total projected surplus of 3,100 dwellings in the long-term. Additional capacity added by the Spatial Plan in the long-term means that the medium-term projected detached dwelling shortfall in greenfield areas of this reporting area is resolved. The reductions in plan enabled capacity from that of the 2025 HBA instead occur in the Quail Rise part of this reporting area.

Table 4-4 – Long-Term Sufficiency by Ward, Location Type and Dwelling Type: Baseline RER Scenario

	Demand (incl. Margin)			RER Capacity (Baseline Scenario)			Net Sufficiency		
Ward	**Detached**	**Attached**	**Total**	**Detached**	**Attached**	**Total**	**Detached**	**Attached**	**Total**
Wanaka Ward									
Existing Urban	1,600	840	**2,500**	4,100	2,700	**6,800**	2,400	1,900	**4,300**
Greenfield	7,400	2,300	**9,700**	4,800	1,900	**6,700**	-2,600	-430	**-3,100**
Total Wanaka Ward	**9,100**	**3,200**	**12,200**	**8,800**	**4,600**	**13,500**	**-230**	**1,500**	**1,200**
Whakatipu Ward									
Existing Urban	1,800	2,500	**4,200**	1,300	3,500	**4,800**	-440	990	**550**
Greenfield	7,500	3,000	**10,500**	6,500	5,000	**11,500**	-950	2,000	**1,000**
Total Whakatipu Ward	**9,200**	**5,500**	**14,700**	**7,800**	**8,400**	**16,200**	**-1,400**	**2,900**	**1,600**
Total Urban Environment									
Existing Urban	3,400	3,300	**6,700**	5,400	6,200	**11,500**	2,000	2,900	**4,800**
Greenfield	14,900	5,300	**20,200**	11,300	6,900	**18,200**	-3,600	1,500	**-2,100**
Total Urban Environment	**18,300**	**8,600**	**26,900**	**16,600**	**13,100**	**29,700**	**-1,600**	**4,400**	**2,800**

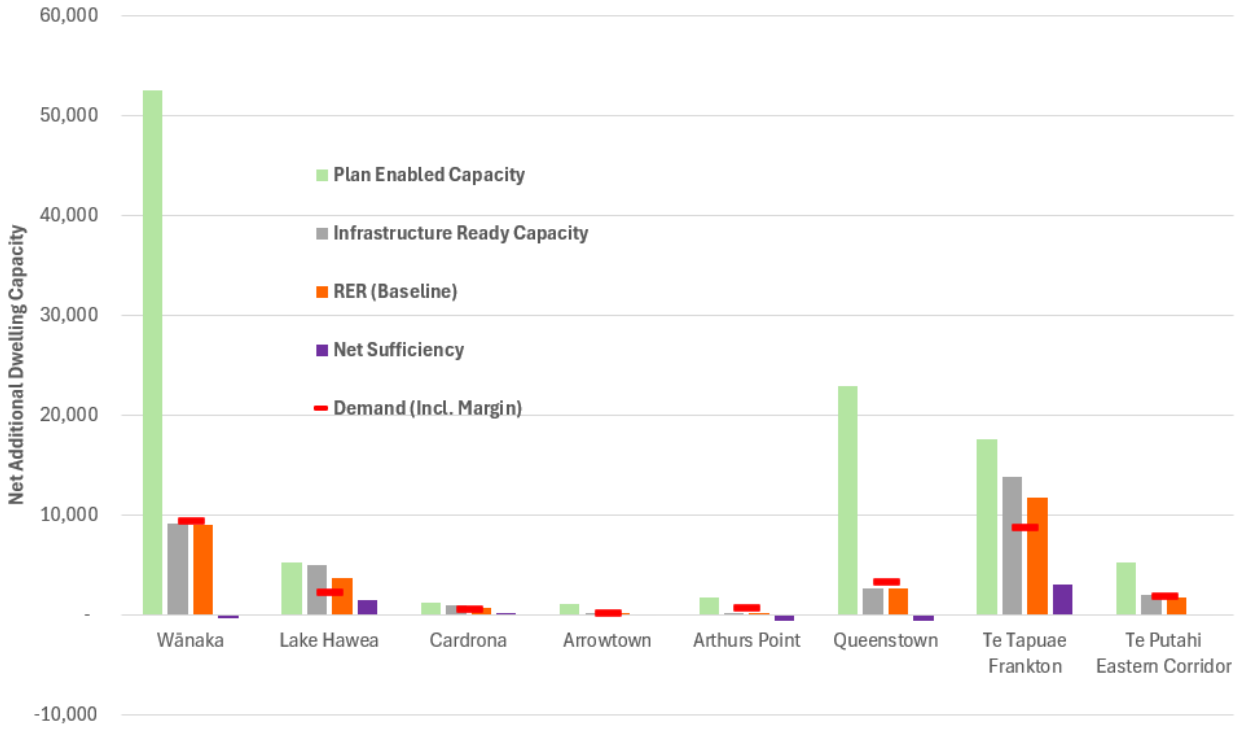
Source: QLDC Growth Model, 2026.

Table 4-5 – Long-Term Sufficiency by Reporting Area, Location Type and Dwelling Type: Baseline RER Scenario

		Demand (incl. Margin)			RER Capacity (Baseline Scenario)			Net Sufficiency		
Reporting Area	**Location Type**	**Detached**	**Attached**	**Total**	**Detached**	**Attached**	**Total**	**Detached**	**Attached**	**Total**
Wānaka	Existing Urban	1,300	690	2,000	2,700	2,000	4,700	1,300	1,300	**2,700**
	Greenfield	5,600	1,800	7,300	3,400	920	4,300	-2,200	-830	**-3,000**
Lake Hawea	Existing Urban	300	160	460	1,400	690	2,100	1,100	530	**1,600**
	Greenfield	1,400	440	1,800	1,300	400	1,700	-140	-40	**-170**
Cardrona	Existing Urban	-	-	-	20	10	30	20	10	**30**
	Greenfield	450	140	590	110	580	690	-340	440	**100**
Arrowtown	Existing Urban	90	130	220	50	90	140	-40	-40	**-80**
	Greenfield	-	-	-	-	-	-	-	-	**-**
Arthurs Point	Existing Urban	260	370	630	-	-	10	-260	-370	**-620**
	Greenfield	-	-	-	-	-	-	-	-	**-**
Queenstown	Existing Urban	1,200	1,600	2,800	130	2,100	2,200	-1,000	450	**-570**
	Greenfield	340	140	480	340	50	390	-	-90	**-80**
Te Tapuae Frankton	Existing Urban	240	340	590	1,100	1,300	2,300	820	940	**1,800**
	Greenfield	5,800	2,300	8,100	6,000	3,500	9,400	190	1,100	**1,300**
Te Putahi Eastern Corridor	Existing Urban	10	10	20	60	20	80	60	10	**60**
	Greenfield	1,300	530	1,900	180	1,500	1,600	-1,100	930	**-210**

Source: QLDC Growth Model, 2026.

Figure 4-2 – Summary of Capacity and Demand by Reporting Area: Long-Term



Source: data from QLDC Growth Model, 2026.

Table 4-6 – Summary of Capacity, Demand and Net Sufficiency by Reporting Area: Long-Term

Reporting Area	Demand (incl. margin)	QLDC Growth Model Capacity			Net Sufficiency
		Plan Enabled	Infrastructure-Ready	RER	
Wānaka	9,300	52,500	9,200	9,000	- 300
Lake Hawea	2,300	5,200	4,900	3,700	1,400
Cardrona	600	1,200	900	700	100
Arrowtown	200	1,100	200	100	- 80
Arthurs Point	600	1,700	10	10	- 600
Queenstown	3,200	22,900	2,600	2,600	- 700
Te Tapuae Frankton	8,700	17,600	13,800	11,800	3,100
Te Putahi Eastern Corridor	1,900	5,300	1,900	1,700	- 200

Source: QLDC Growth Model, 2026.

5 Implications of Changes

This section considers the implications of the change from the incorporation of the Notified Version UIV to the Decisions Version UIV in the medium and long-term. It recognises that the UIV (Decisions or Notified versions) provides only part of the capacity picture for the district (with capacity also provided through the pre-UIV plan enabled capacity provided through earlier stages of the district plan review the ODP Special Zones and the Spatial Plan), although focuses on assessing the effect of this change with other areas of capacity remaining constant. However, the overall impact of these changes between the Decisions and Notified versions UIV sets of provisions are considered within the context of the district's total housing market development picture.

The differences between the Notified and Decisions versions of the UIV have important implications for the district. There are significant changes in the level of capacity and types of development opportunity between each set of provisions, with the type of change and corresponding impacts varying by location across the district.

When considering the likely effects of the changes, there is an important distinction between the enabled development opportunity vs. the development capacity that is produced. The development opportunity refers to the level and types (including scale) of development options provided to the market in each location. This is distinct from development capacity, as defined in the NPS-UD, which instead has a greater focus on the amount of capacity defined in terms of the number of dwellings.

The QLDC growth model focuses on the development capacity in line with the NPS-UD Policy 2 requirements, with the final sufficiency position heavily influenced by infrastructure provision. The updated model outputs show that both sets of provisions produce large increases in the number of additional dwellings enabled from that of the short-term provisions. From a capacity perspective, the potential number of dwellings enabled in each location remains well above the level of projected demand. Taking into account infrastructure constraints, and the portion of capacity expected to be realised, the results indicate that sufficient capacity is likely to remain to meet the projected growth in the district over the medium to long-term.

While the total enabled capacity is sizeable, there are significant differences in the types of dwellings enabled in some locations (between the sets of provisions) and the density and scale at which they are enabled. This is likely to shift the feasibility of development options in these areas and have some impact on the resulting development patterns to the extent sustained by the market. Understanding these changes is also important from an NPS-UD Policy 5 perspective that considers whether the types and density of dwellings align with the level relative demand for different types of housing in each location.

A significant difference between sets of provisions occurs in the MDR zone, which is likely to play an important role in meeting housing demand across a significant share of the district's demand profile. The Decisions Version UIV divides this zone into two parts, with important differences in the types of dwellings enabled, with corresponding effects on the types of development patterns encouraged. The MDRA zone has much greater densities, enabling up to intensive terraced housing and low-rise apartments. The higher enabled dwelling yields are more likely to increase the feasibility of redevelopment, incentivising attached

dwellings. In comparison, the MDR Zone limits density to one dwelling per 250m^2 net site area, which may reduce the feasibility of redevelopment (through insufficient increases in dwelling yield) and provide lower incentive to develop attached dwellings (with similar yields produced by small detached dwellings).

The division of the HDR Zone into HDR and HDRA is likely to also have implications on the types of development patterns that are feasible and incentivised. However, the overall scale of this change is likely to be less than the MDR Zone when considered in relation to the portions of the district's housing demand profile to which it corresponds.

The implications of these changes differ by location within the district, with sizeable differences between the Notified and Decisions versions of the UIV in some areas. These are described below.

Whakatipu Ward Implications

At a broad scale, the Decisions Version UIV has a greater relative focus on the central parts of the ward around the Queenstown Town Centre in comparison to the Notified Version UIV provisions. It continues to provide for residential intensification opportunity in these areas, spatially expanding the provision to the west of the town centre, while scaling back the Notified Version UIV opportunity in other parts of the ward.

The enabled development opportunity is likely to provide a level of flexibility for the market in these areas, at a scale commensurate with the types of demand expected to occur. The revised provisions continue to cover most of the central and most accessible parts of the market, which are likely to sustain the largest shares of market demand for more intensive development.

Most significantly, the Decisions Version UIV provisions substantially reduce the proposed intensification opportunity around the Frankton residential area and along Frankton Arm from that of the Notified Version UIV. The Decisions Version provisions are likely to reduce the feasibility of redevelopment in these areas, gradually resulting in a reduced dwelling mix from that encouraged by the Notified Version UIV provisions.

Changes in the provisions in other, less central, parts of the ward are likely to have a more limited effect on the feasibility of medium density dwellings as these dwellings generally correspond to smaller parts of the market in these areas. The Decisions Version UIV provisions are likely to increase the feasibility of development in the suburban areas of the ward through the increased flexibility of development enabled in the Suburban Residential Zone.

Wānaka Ward Implications

There are large changes in the types and location of development opportunity in the Wānaka Ward through the Decisions Version UIV provisions. These have important implications for the growth patterns that are expected to occur in the ward, becoming more significant through the medium to long-term.

The Decisions Version UIV provisions significantly shift the geographic focus of residential intensification within the Wānaka township area from the Notified Version UIV. They concentrate the opportunity for intensification around the Three Parks area, coupled with a downscaling of the opportunity for intensification in areas surrounding the Wānaka Town Centre. As outlined in Section 2.3, the Decisions Version UIV provisions provide for large scale up-zoning at a high density in areas surrounding the Three Parks commercial centre, with further intensive medium density development enabled through the MDRZ zone across the adjacent greenfield areas.

While the Wānaka residential intensification opportunities have a greater relative focus in Three Parks, residential growth in this area is also within the primary catchment area of the Wānaka Town Centre. Growth is likely to generate increased demand for retail and other commercial centre-based activities within this area that will contribute to the commercial viability of the town centre.

However, the reduction in development provisions in areas surrounding the town centre (from that of the Notified Version UIV) is also significant. The updated lower enabled dwelling yields are likely to limit the feasibility of redeveloping sites around the town centre. The potential increase in dwelling yields (enabled through the Decisions Version UIV) are significantly lower than that of the Notified Version UIV provisions and less likely to be sufficient to incentivise redevelopment of many sites.

The additional areas of greenfield capacity added in Wānaka through the Spatial Plan in the long-term are expected to play an important role in meeting long-term growth needs despite the large increases in capacity in live-zoned greenfield areas through the Decisions Version UIV. A sizeable share of the Decisions Version UIV additional capacity occurs as development opportunity for more intensive dwellings at a medium to higher density. While the demand for attached dwellings is expected to increase through time, much of this capacity is likely to get taken up at densities below that of the maximum enabled by the Plan, particularly within the HDRA/HDR zone. The dwelling yield realised across these areas is therefore likely to be correspondingly lower than that indicated by the proportional increase in enabled capacity. In addition, the further areas provided by the Spatial Plan are likely play an important role in meeting demand for different types of dwellings. These may result in different typologies and densities to those delivered in more central parts of the Wānaka Ward.

Alignment with Future Housing Demand

At a district and ward-level the medium and long-term enabled residential development opportunity (incorporating the Decisions Version UIV) is likely to encourage housing development patterns that closer align with future housing need than previously enabled under the PDP provisions. The scale and types of capacity provided range from detached dwellings across large suburban parts of the district, to also include significant opportunity for medium to higher density dwellings in more accessible parts of the urban environment.

The intensification opportunities are likely to incentivise increased development of a greater range of dwellings, which increase housing choice in the district. The greater flexibility applied across the wider suburban areas is also likely to provide more housing options in these areas, and increase the opportunity for infill development.

While the housing choice is likely to be increased at a broader spatial scale, there are parts of the urban environment which may have a reduced housing mix in comparison to that expected to occur under the notified provisions. These include areas where the MDR zone is applied (as distinct from the MDRA zone) through the reduced feasibility of redevelopment and some attached dwellings as described above.

Timing and Location of Differences in Development Patterns

The effects of the changes in the Decisions Version UIV provisions are likely to be realised through gradual changes in development patterns over the medium to long-term. The effects are likely to be minor initially,

becoming gradually more significant over the medium to long-term as increased new dwellings are added to the stock.

The differences in the total number and types of dwellings delivered are likely to correspond to a minor portion of the market and limited to certain locations within the district. The development opportunity contained in both sets of provisions predominantly corresponds to the same areas of the market. The differences (where they occur in each location) correspond to the medium and higher density parts of the market, which are likely to form minor shares of the dwellings sustained at the locations where the differences are applied.

The increased development opportunity provided in the Wānaka reporting area is likely to better enable the market to meet future housing demand than the notified provisions. Growth projections were revised significantly upward for the ward subsequent to the notification of the UIV, resulting in high levels of demand in comparison to enabled medium-term capacity. The effect of these increased provisions is only seen in the QLDC growth model plan enabled capacity, as the realised capacity is influenced by levels of infrastructure provision and the assumed development market conditions[16].

Differences in the geographic patterns of development are likely to be more observed than differences in the total number and type of dwellings delivered as the market responds to the location where development opportunity is applied. Only some of these changes may result in differences in total housing supply.

Differences in the geographic patterns of development are expected to be greatest in Wānaka as a result of the large changes in the scale and location of development opportunity as described above. Moreover, these are applied across greenfield areas, meaning that development may occur faster than as redevelopment in brownfield areas.

Impact of Infrastructure

The QLDC growth model updated outputs show that the district's infrastructure networks are likely to continue to have a strong influence on the levels of dwelling capacity realised across each part of the urban environment. In line with the NPS-UD technical requirements, the modelled outputs are constrained by infrastructure capacity limits. As such, the modelled RER capacity remains the same under both sets of outputs, as aligned closely with infrastructure limits.

[16] As described in the 2025 HBA, the QLDC growth model applies a current market development picture to remain focused on detached dwellings to produce a conservative estimate of future capacity.

6 Appendices

This appendix contains the updated inputs and assumptions applied within the QLDC growth model to estimate residential and business capacity within the QLD urban environment with the application of the Decisions Version UIV in the medium and long-term. They cover the updated assumptions applied to the plan enabled and RER capacity. The assumptions applied to model commercially feasible capacity remain the same as those in the 2025 HBA.

The following tables contain the site coverage, maximum building height and minimum land area per dwelling inputs and assumptions applied within the QLDC growth model across areas contained within the district plan zones. These are applied to each parcel to model the plan enabled and RER capacity for residential dwellings and business area capacity in the medium and long-term.

Table 6-1 – Medium and Long-Term Plan Enabled and RER Capacity Development Modelling Parameters: District Plan Zones

Zone	Sub-Zone/Area	Site Coverage (%)	Height (m)	Lot Size (m2)	
				Plan Enabled Capacity	RER Capacity
Future Development Area	All areas (long-term only)	40	8.0	300	390
Suburban Residential Zone	Queenstown Country Club	40	8.0	400	500
	Coneburn	40	8.0	500	600
	Frankton North Airport Outer 55 (Incl. VA) (Inner 65 excluded)	40	7.0	600	780
	B Hawea	40	8.0	450	550
	4.5m Kawarau Heights	40	4.5	450	550
	6m Kawarau Heights	40	6.0	450	550
	Luggate	40	8.0	300	910
	All other areas	40	8.0	300	390
Medium Density Residential Zone	Frankton North	50	11.0	250	325
	All other areas	45	8.0	250	325
Medium Density Residential Zone A	Queenstown and Wanaka	45	11.0	160	208
High Density Residential Zone	Kawarau Falls and Wanaka	70	10.0	95	124
	Frankton North	75	20.0	45	59
	All other areas	70	15.0	65	85
High Density Residential Zone A	Queenstown and Wanaka	70	24.0	20	26
Settlement Zone	Glenorchy (incl. VA)	40	5.5	800	1,040
	Makarora (incl. VA)	40	5.5	1,000	1,300
	Kingston (incl. VA); Kinlock (incl. VA); Luggate	40	7.0	800	1,040
	Cardrona	40	12.0	800	1,040
	Cardrona VA	50	12.0	800	1,040
	Glenorchy Commercial Precinct	80	7.0	800	1,040
	Kingston Commercial Precinct; Luggate Commercial Precinct	80	8.5	800	1,040
	Cardrona Commercial Precinct	80	12.0	800	1,040
Residential Historic Management Zone	VA area	45	8.0	275	358
	Other areas	30	5.0	650	845
Large Lot Residential A Zone	All areas incl. VA	15	8.0	2,000	2,600
Large Lot Residential B Zone	Wanaka	15	8.0	4,000	5,200

Table 6-2 – Medium and Long-Term Plan Enabled Capacity Inputs and Assumptions for Business Development Capacity Modelling Parameters: District Plan Zones

Zone	Sub-Zone/Area	Site Coverage (%)	Height (m)
Local Shopping Centre Zone	Hansen	50	10
	Arrowtown	75	7
	All other areas	75	10
Business Mixed Use Zone	Frankton Marina	75	15
	Queenstown; Frankton North	75	20
	Wanaka	75	12
Town Centre Zone	Queenstown P1 (transition)	75	8
	Queenstown P7 and Wanaka P2	75	12
	Wanaka P1	75	14
	Wanaka	75	20
	Queenstown P4 (transition)	75	24
	Future Lakeview	80	12
	Arrowtown	90	7
	IPI Queenstown P6	100	4
	Queenstown P1, P6 and IPI P1	100	8
	Queenstown P2 and IPI P2	100	12
	Queenstown IPI P7	100	15
	Queenstown P1a	100	15.5
	Queenstown P5 and IPI P5	100	16
	Queenstown P3 and IPI P3	100	20
	Queenstown P4 and IPI P4	100	24
General Industrial Zone	Wanaka and Gorge Road	75	7
	Arrowtown and Frankton	75	10