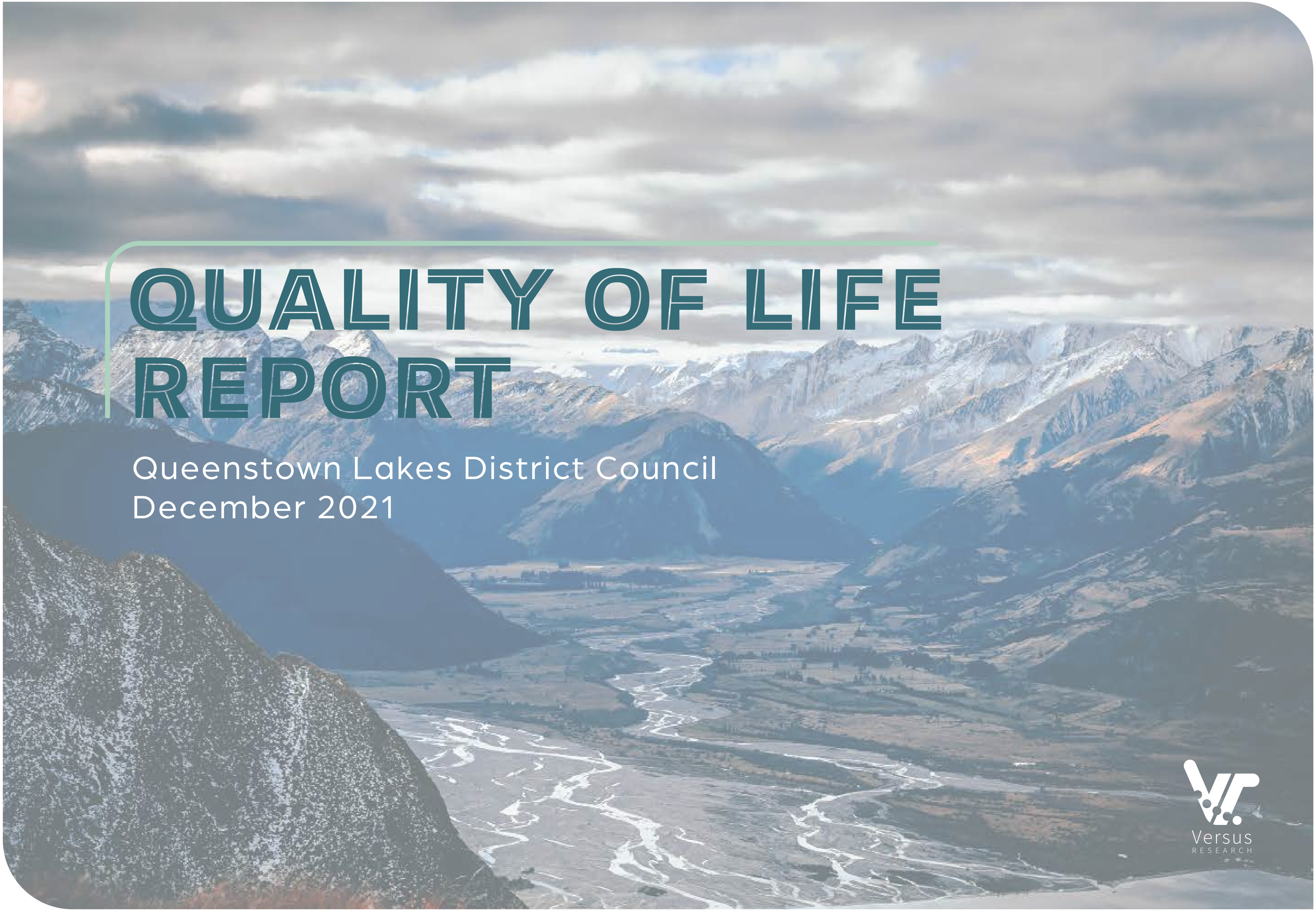
QUALITY OF LIFE REPORT

Queenstown Lakes District Council
December 2021



Versus
RESEARCH

CONTENTS

PROJECT BACKGROUND

BACKGROUND

Queenstown Lakes District Council (QLDC/Council) is the local area authority responsible for the delivery of services to residents in the Queenstown Lakes district.

Since 2018, QLDC has conducted the Quality of Life Survey to gauge residents' overall quality of life. Specifically, this study has looked at the various facets which contribute to quality of life, so that QLDC and its partners can help improve the quality of life of residents throughout the district. This is the fourth year that the Quality of Life Survey has been conducted.

METHOD

QLDC commissioned Versus Research to complete a quantitative survey with Queenstown Lakes residents.

Consistent with previous years, participants' details for this year's survey were obtained via the electoral roll, whereby a total number of n=12,500 residents were selected at random to participate in the survey. These residents were sent a letter with a unique ID passcode, inviting them to participate in the online survey. It should be noted that QLDC implemented some additional measures to further support and promote participation in the survey, by inviting a wider range of people to complete the survey through social media channels.

If participants were unable to participate in the online component of the survey, an option to have a paper version sent via post was offered on request.

A copy of the survey can be found in the appendix.

SAMPLE

A total number of n=1,282 completed responses were collected. This sample was then stratified to achieve the most proportionate balance of respondents (i.e. area, gender, and age measures) and condensed down to a final sample of n=1,000 responses.

It should be noted, that this document only contains the results of residents. Non-residents were included in this study and their results are provided in a separate document.

PROJECT BACKGROUND

MARGIN OF ERROR

Margin of Error (MoE) is a statistic used to show the amount of random sampling error present in a survey's results. The MoE is particularly relevant when analysing a subset of data as a smaller sample size incurs a greater MoE. The final sample size for this study was n=1,000, which yields a maximum MoE of +/- 3.1%. That is, if the observed result on the total sample of n=1,000 is 50% (point of maximum margin of error), then there is a 95% probability that the true answer falls between 46.9% and 53.1%.

SIGNIFICANCE TESTING

Where year on year results have been presented, significance testing has been applied to identify statistically significant differences between 2020 and 2021 findings.

WEIGHTS

Age weightings have been applied to the final data set. Weighting is used in research to ensure that the final data set is not skewed, i.e., that each group is represented as it would be in the population.

The weighting proportions are based on the 2018 Census (Statistics New Zealand). These proportions are outlined in the table below:

Age	Weighting proportion (%)
18-24	10%
25-39	37%
40-54	23%
55-64	14%
65+	16%

COVID-19

It should be noted that this study was not commissioned to understand and analyse the impacts of COVID-19. However, the findings from this report should be considered in light of the impact that COVID-19 may have had on some results, particularly given that the 2021 survey was completed shortly after the Delta outbreak in New Zealand.

HOW TO READ

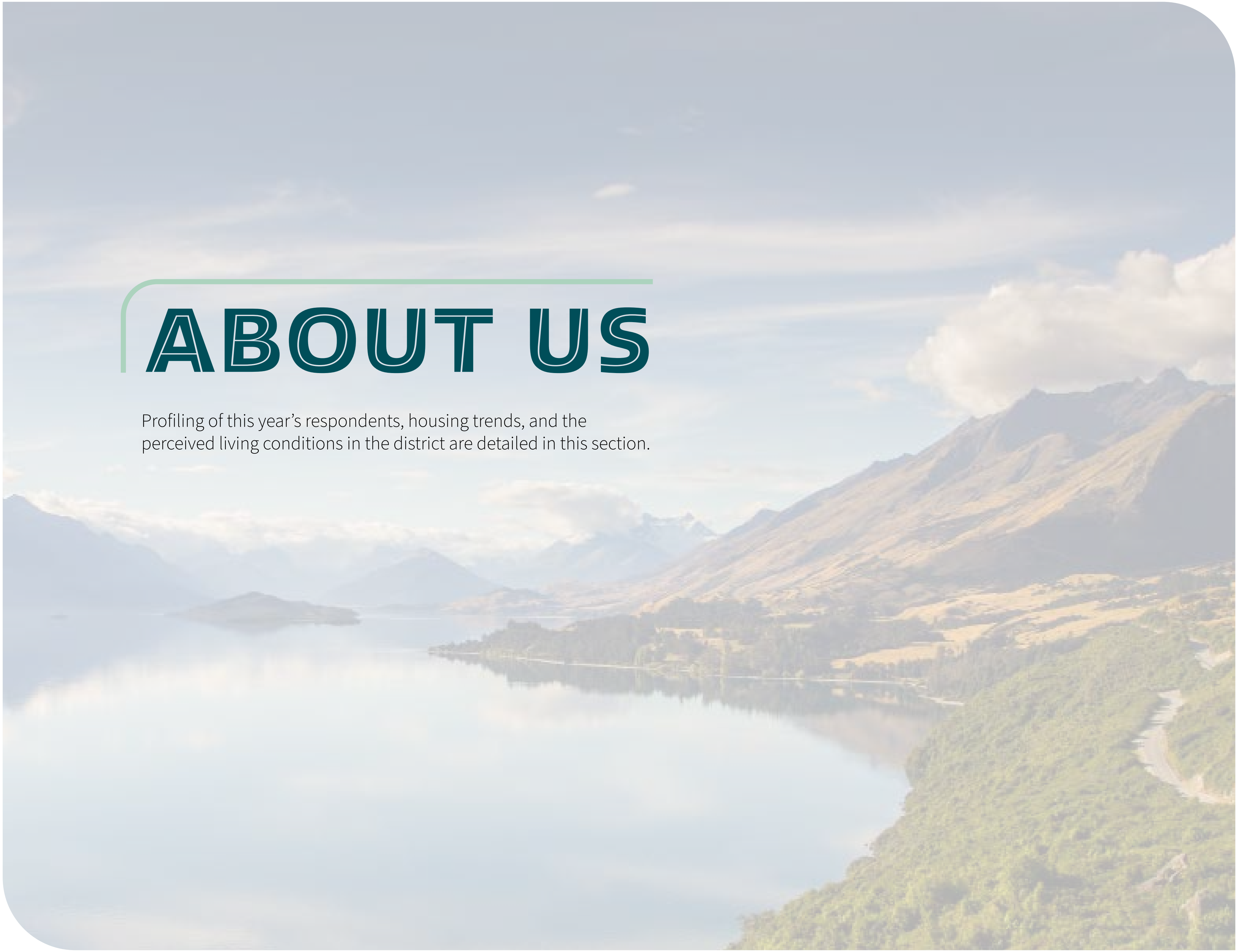
Findings for this study have been split and reported into 11 main sections. These sections are outlined to the right. For the most part, these sections remain consistent with previous years. However, the inclusion of new questions this year has meant slight variances in the measures reported under each section.

The following details should be considered when reviewing this report:

- All base sizes are n=1,000 unless indicated by a footnote placed on the given page;
- On certain charts, labels less than 3% have not been shown as overlapping results make it difficult to read;
- Due to rounding and multiple-choice questions, not all percentages total 100%;
- A small square has been used to signify whether an observed result is significantly different to 2020;
- The abbreviation 'c.f.' is used throughout the report's commentary when comparing year-on-year results. This abbreviation means 'compared to'.

RELATIONSHIP BETWEEN DEMOGRAPHIC VARIABLES

Throughout this report, analysis has been conducted by demographic variables to see where differences between different respondents may exist. This analysis has been completed for the demographic variables independently, and correlations that may exist between these demographics have not been accounted for, or reported on, in this analysis. Readers should bear this in mind when reviewing these findings.



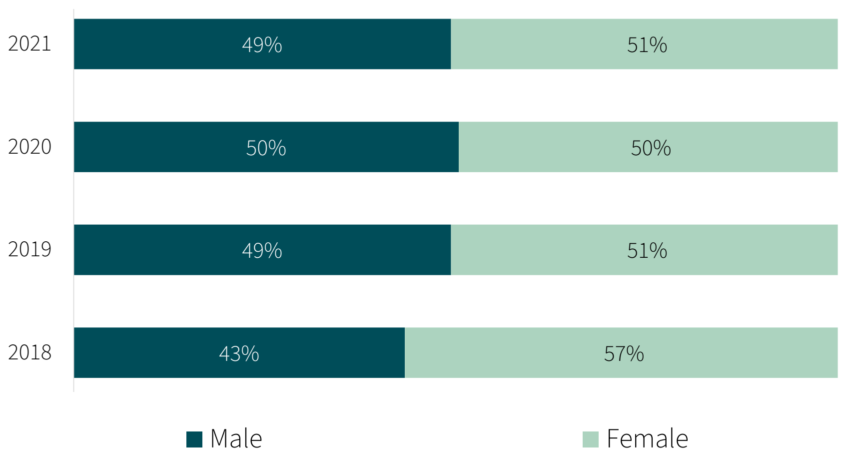
ABOUT US

Profiling of this year's respondents, housing trends, and the perceived living conditions in the district are detailed in this section.

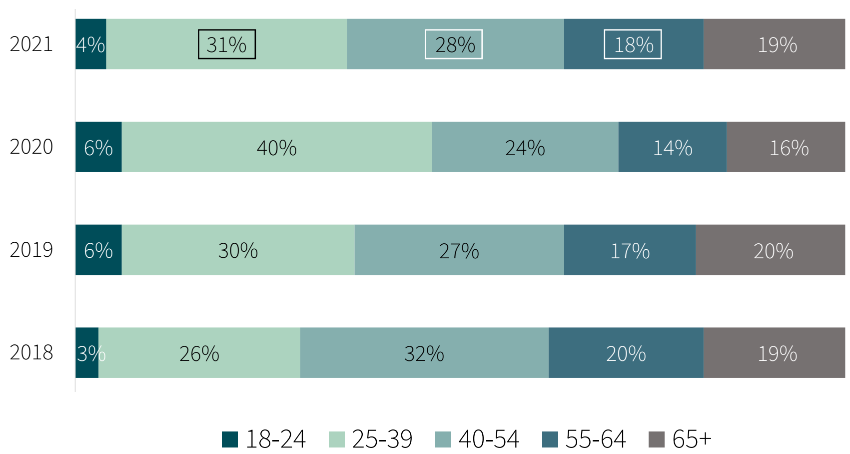
OUR DISTRICT*

Consistent with the gender split observed in 2020, 49% of respondents identified as male, while 51% of respondents identified as female. The highest proportion of respondents were aged 25-39 years (31% c.f.** 2020, 40%), followed by 28% of respondents who were aged 40-54 years (c.f. 2020, 24%).

GENDER



AGE

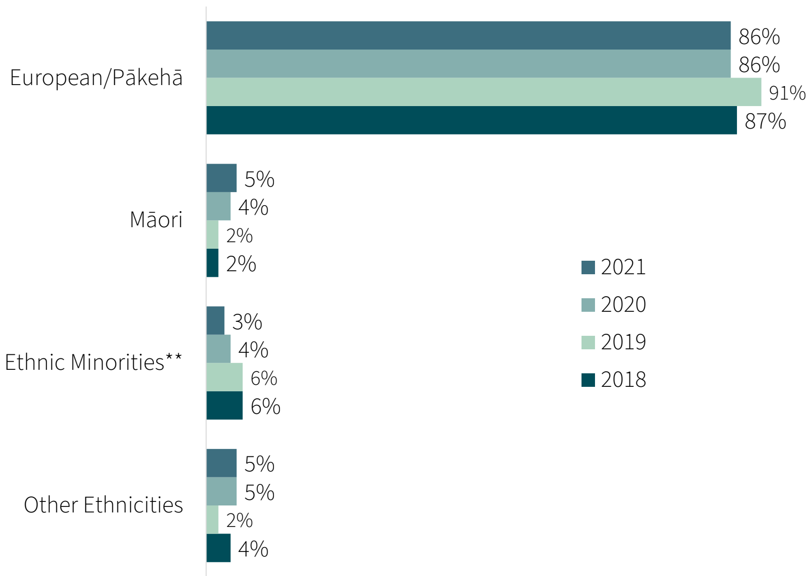


**Please note that these findings are unweighted and represent the survey sample only, not the actual Queenstown Lakes District population.*
***This abbreviation means 'compared to'. Further details are noted on page 5.*

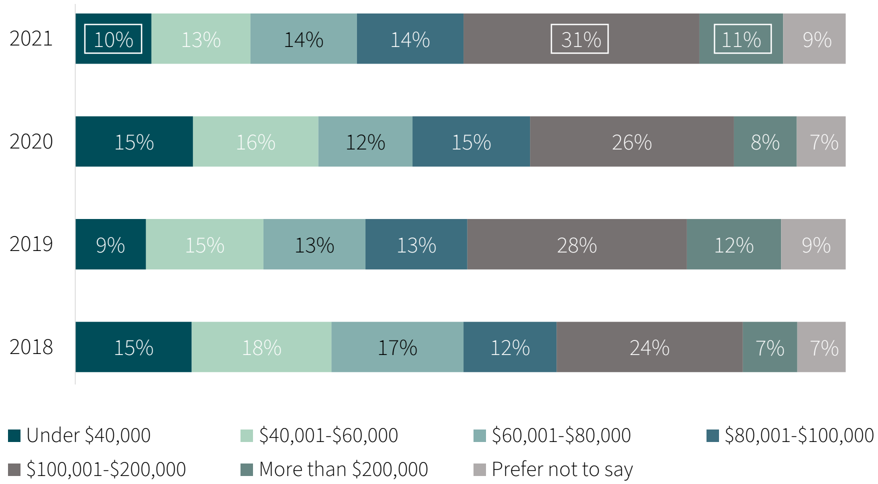
OUR DISTRICT*

Similar to 2021, the highest proportion of respondents identified as European/Pākehā (86%), followed by 5% of respondents who identified as Māori (c.f. 2020, 4%). Nearly one third (31% c.f. 2020, 26%) of respondents received an annual household income of $100,001-$200,000.

ETHNICITY



INCOME

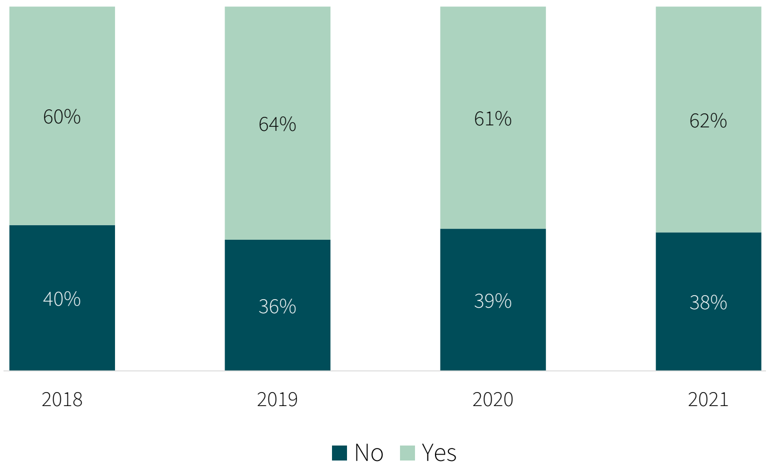


**Please note that these findings are unweighted and represent the survey sample only, not the actual Queenstown Lakes District population.*

***Please note that Ethnic Minorities includes those who identified as Pacific Peoples, Middle Eastern, Latin American, or African.*

OUR DISTRICT*

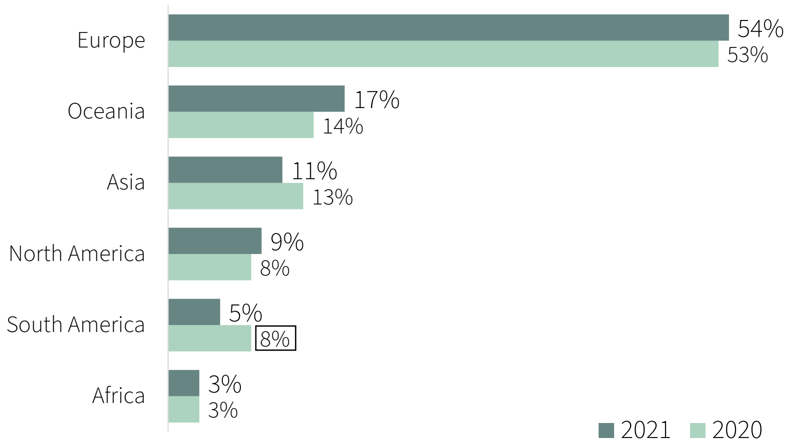
BORN IN NEW ZEALAND



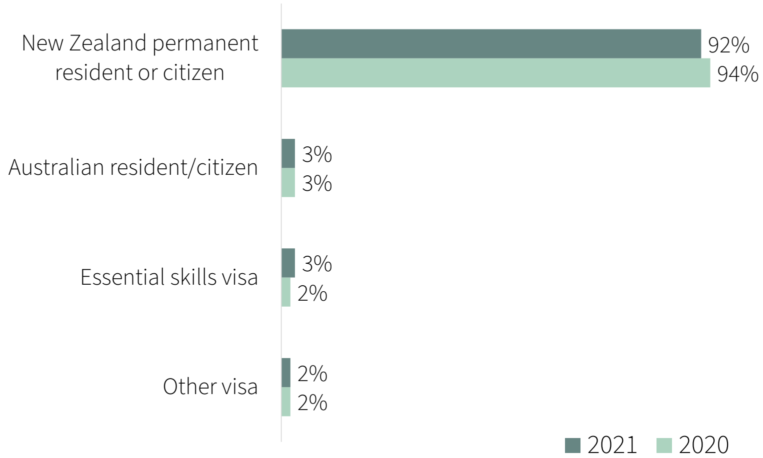
Sixty two percent of respondents said they were born in New Zealand (c.f. 2020, 61%). Of the respondents who were born outside of New Zealand (38% c.f. 2020, 39%), over half (54% c.f. 2020, 53%) were born in Europe.

Ninety two percent of respondents indicated that they were a New Zealand permanent resident or citizen (c.f. 2020, 94%).

OTHER PLACES OF BIRTH



VISA

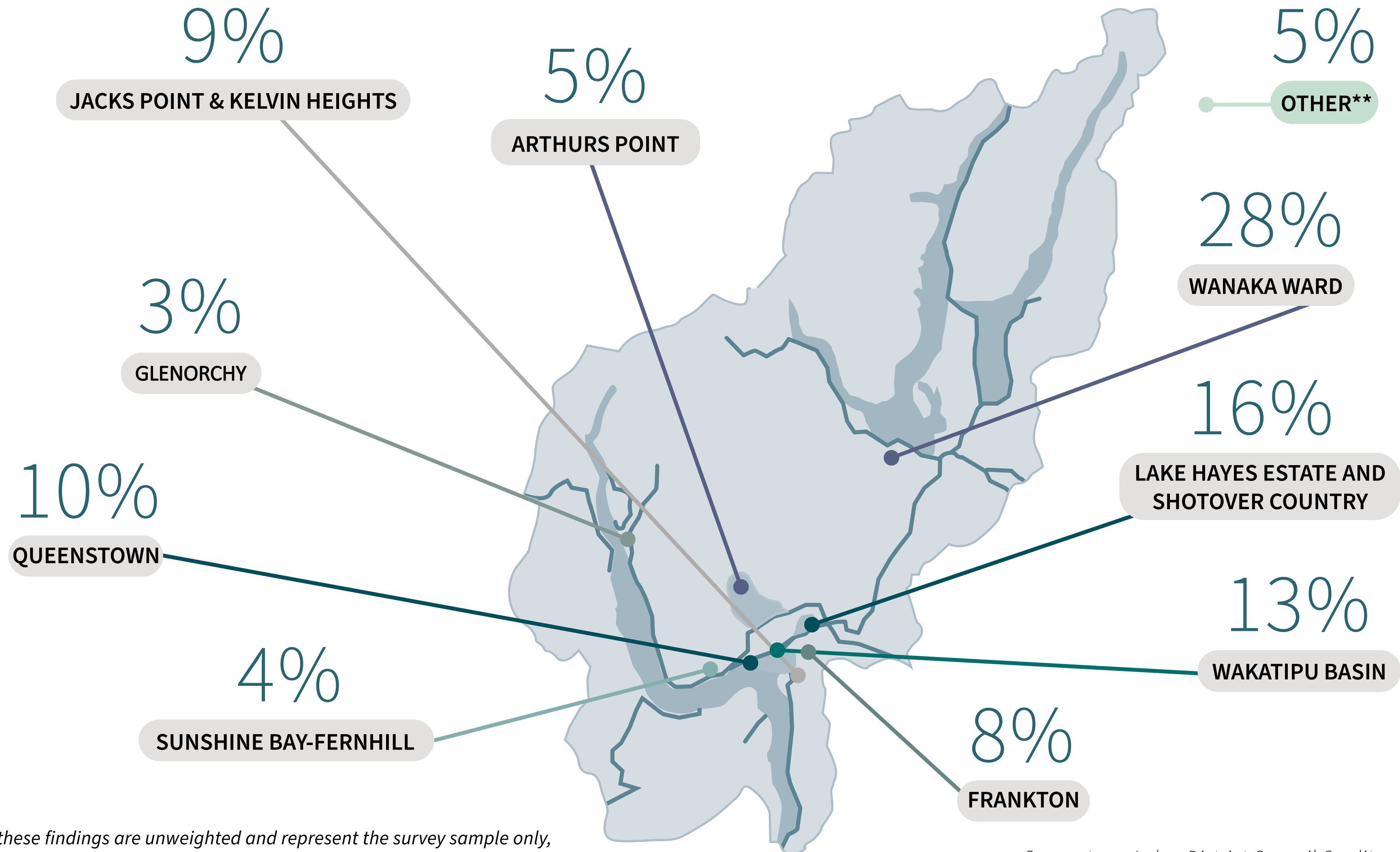


(Base size n=378)

**Please note that these findings are unweighted and represent the survey sample only, not the actual Queenstown Lakes District population.*

NEIGHBOURHOOD*

Twenty eight percent of respondents resided within the Wanaka ward, followed by 16% who resided in Lake Hayes Estate and Shotover Country. It should be noted that proportions for the neighbourhood responses are consistent with 2020.



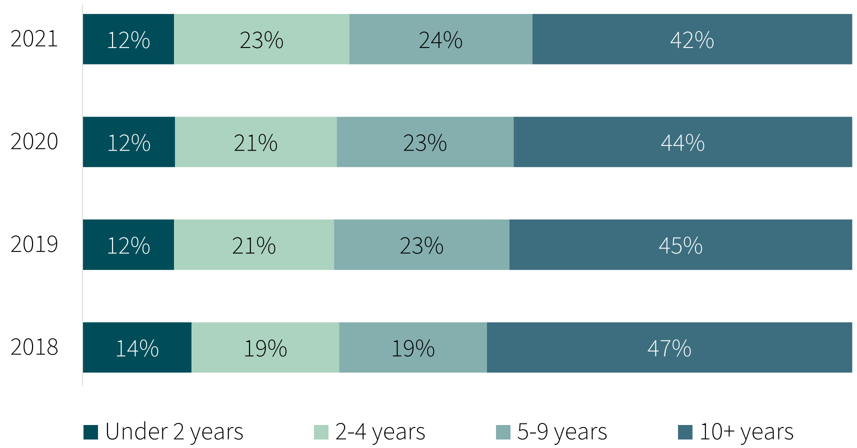
*Please note that these findings are unweighted and represent the survey sample only, not the actual Queenstown Lakes District population. Annual trends for this measure can be found in the Appendix

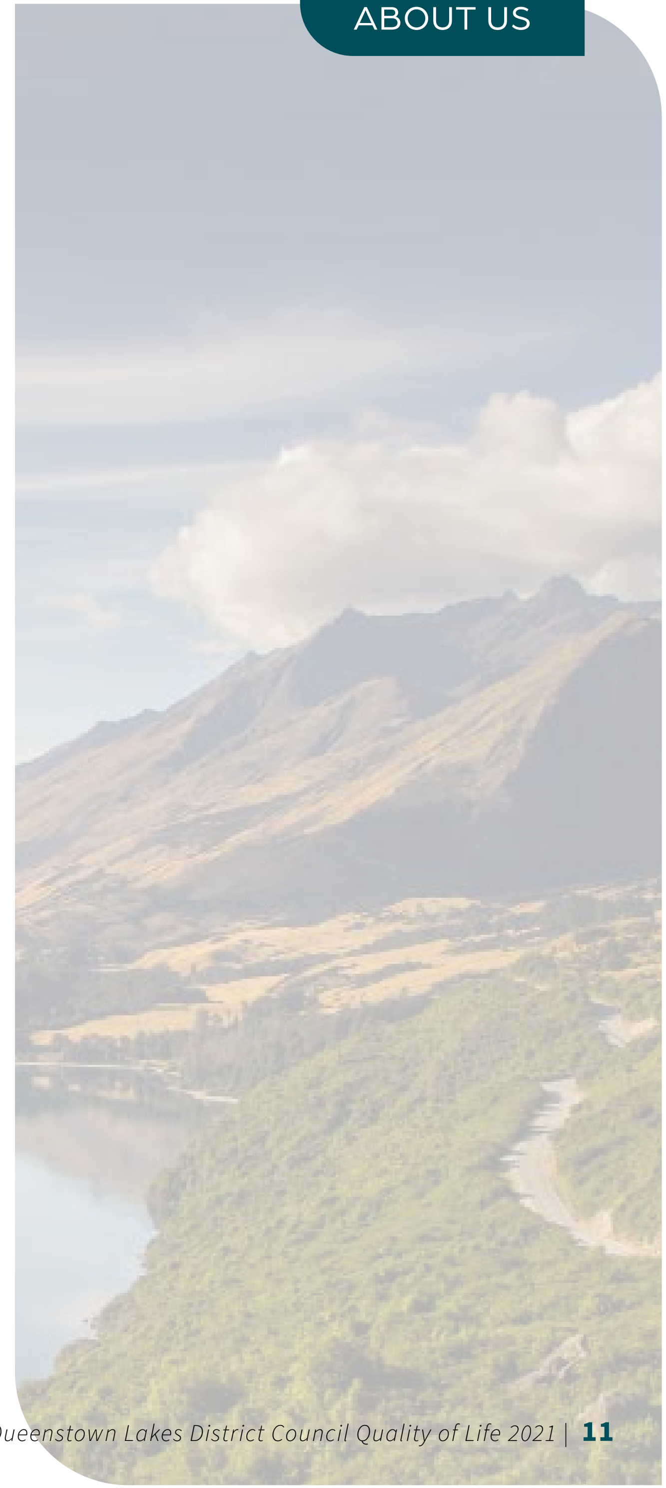
**This is a combination of all area groups with less than 20 respondents.

OUR HOMES

As previous years have shown, the highest proportion of respondents were long term residents, having resided in the district for 10 or more years (42% c.f. 2020, 44%). A further 24% of respondents have lived in the district for 5-9 years (c.f. 2020, 23%).

YEARS IN THE DISTRICT



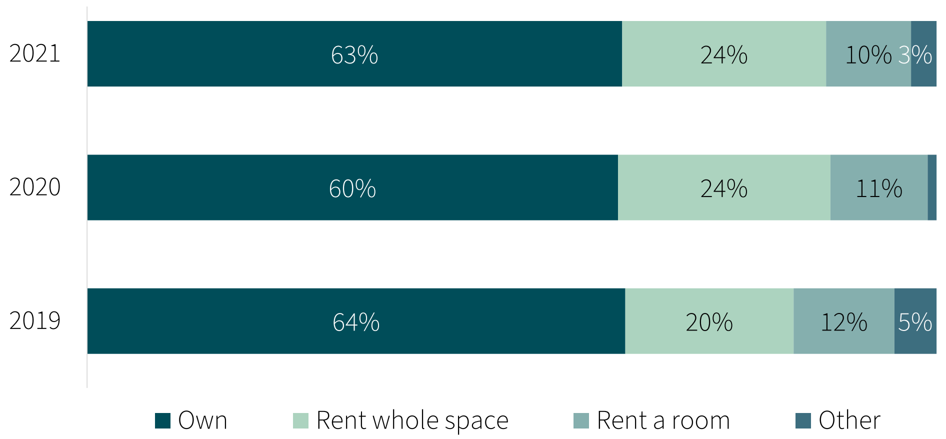


OUR HOMES

HOUSEHOLD COMPOSITION

	2018	2019	2020	2021
Partner/spouse	73%	73%	71%	77%
Children and/or partner's children	32%	30%	28%	28%
Other unrelated children/adults	26%	19%	15%	17%
Live alone	3%	4%	7%	6%
Parents	6%	8%	7%	5%
Other relative	3%	6%	4%	4%

HOME OWNERSHIP



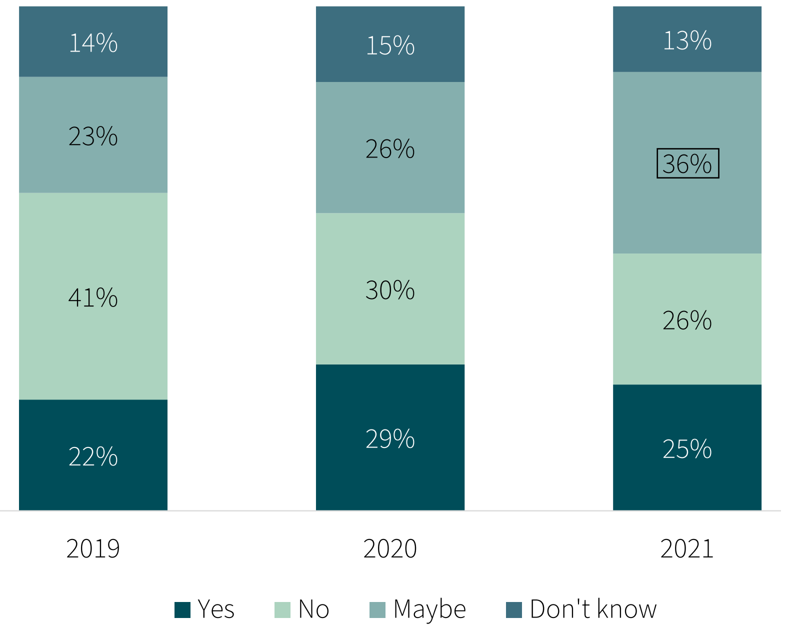
Over three quarters (77%) of respondents indicated they lived with their partner or spouse (c.f. 2020, 71%), while 28% said they lived with their own, or their partner's children (28%).

This year saw a slight increase in the proportion of respondents who owned their home (63% c.f. 2020, 60%), while 34% of respondents said they either rented a whole space (24% c.f. 2020, 24%), or rented a room (10% c.f. 2020, 11%).

OUR HOMES

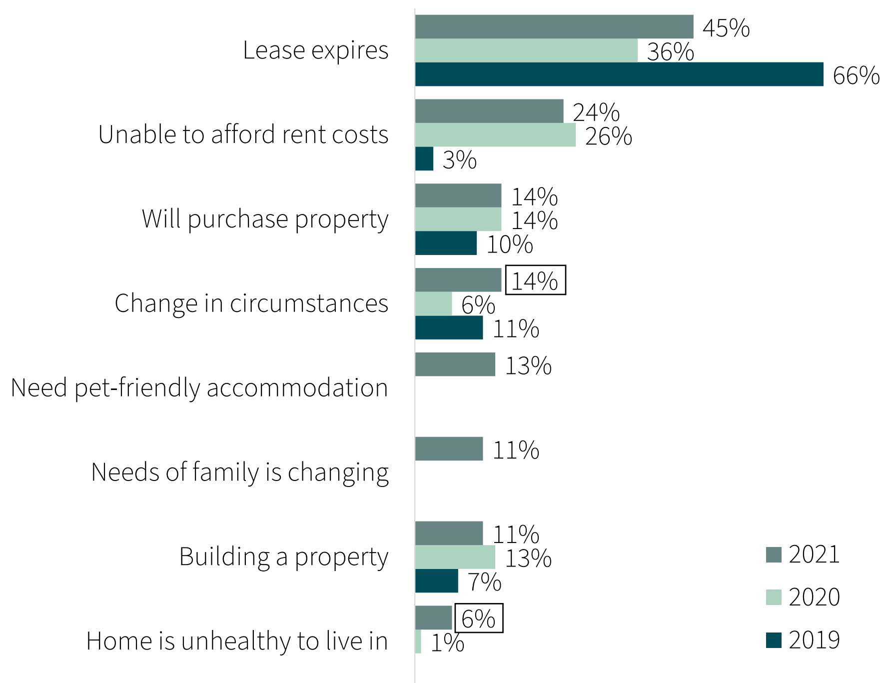
Of the respondents who rented a whole space or a room (34%), 61% indicated that they needed to move (25%) or may need to move (36%) within the next 12 months. This is an increase of 6% compared to 2020 (55%). Key reasons for needing to move (or possibly needing to move) included lease expiration (45% c.f. 2020, 36%) and an inability to afford rent costs (24%, c.f. 2020, 26%).

NEED TO MOVE WITHIN THE NEXT 12 MONTHS



(Base size n=283)

MOVING INFLUENCES

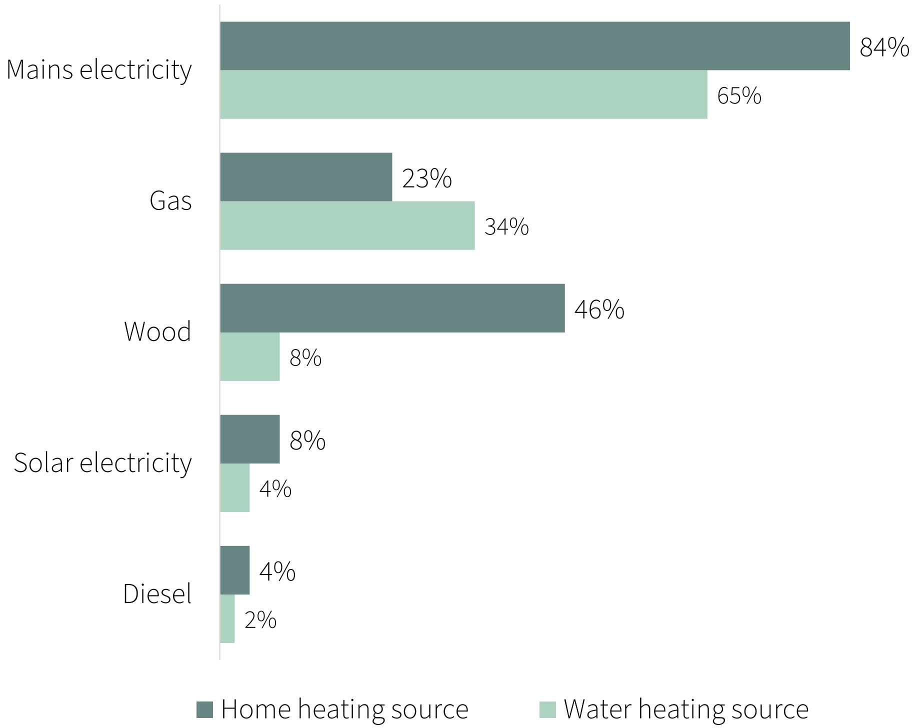


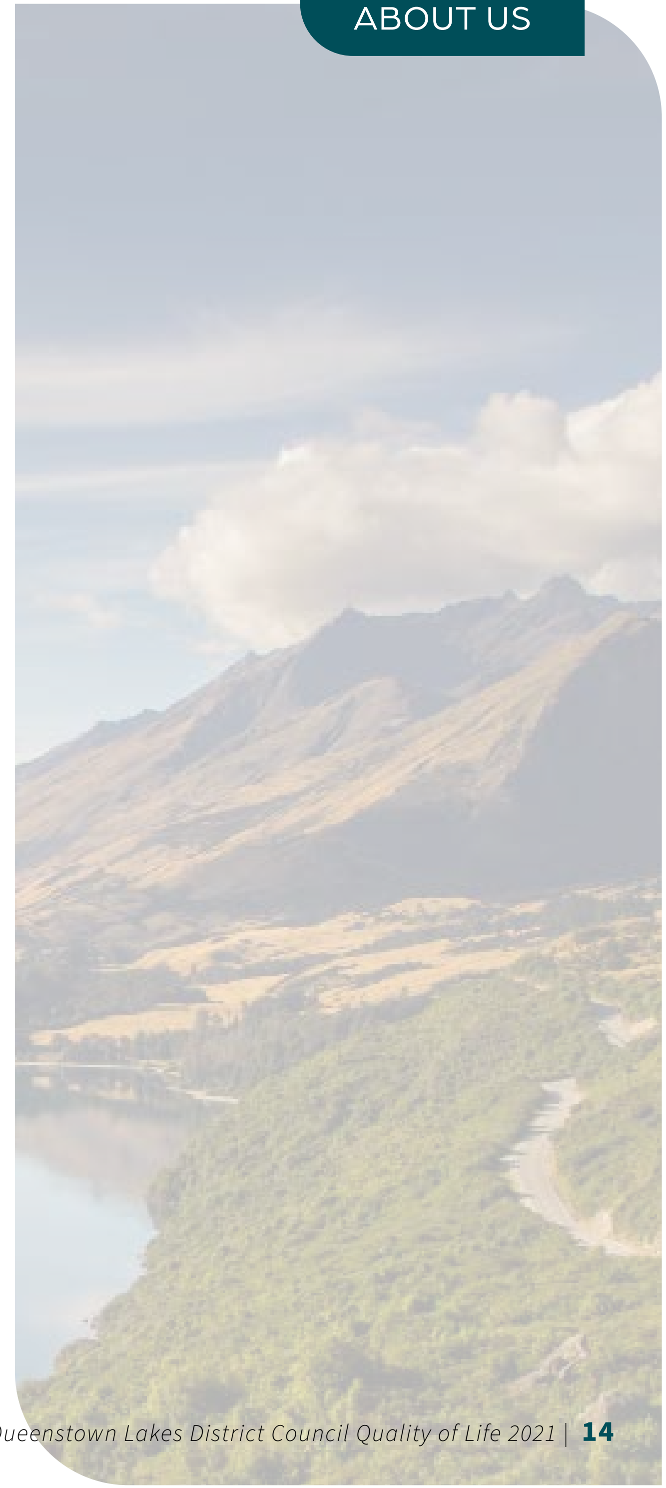
(Base size n=165)

OUR HOMES

This year, respondents were asked what energy sources were used for their home and water heating. For both functions, mains electricity was used by the majority of respondents (home, 84% and water, 65%).
For home heating, wood was the second most used energy source (46%), followed by gas (23%). Concurrently, gas was the second most used energy for water heating (34%), followed by wood (8%).

HEATING SOURCE





OUR HOMES

Seventy eight percent of respondents indicated that they could heat their home. This is a decrease of 8% compared to 2020 (86%). This change was reflected in an increase in the proportion of respondents who could not heat their home (8% c.f. 2020, 4%), or could only sometimes heat their home (14% c.f. 2020, 10%).

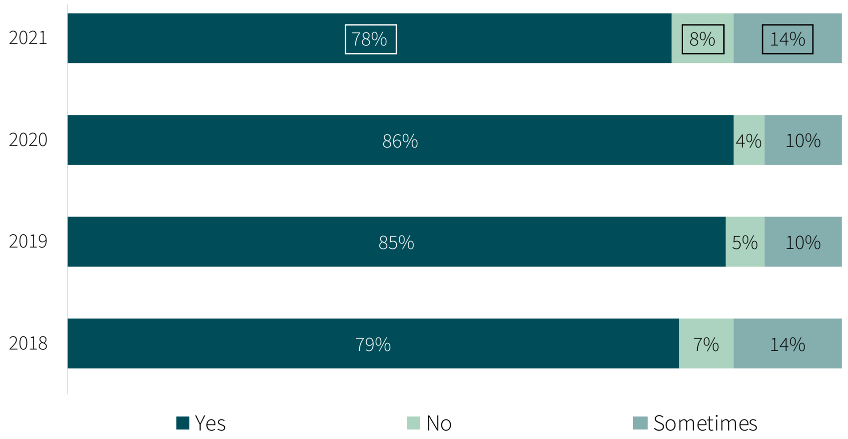
Respondents who could not heat their home, or who could only sometimes heat their home said that affordability (71% c.f. 2020, 74%) and poor window glazing (47% c.f. 2020, 50%) were the key reasons for their inability to do so.

It should also be noted that there was an increase of 5% in the proportion of respondents who said a lack of heat source drove their inability to heat their home.

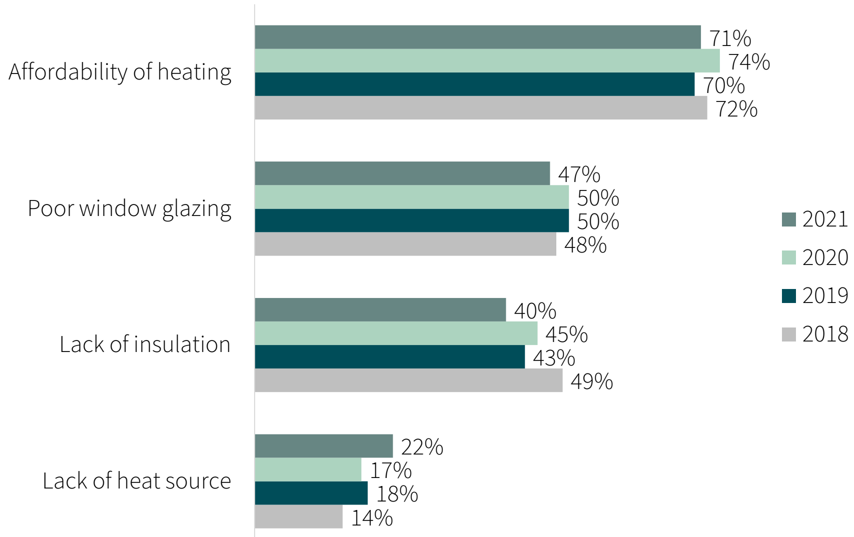
Minority groups and/or those in more disadvantaged circumstances continue to represent the respondents who are most unable to heat their home. Specifically, these respondents are more likely to:

- Be on a lower income (less than $60,000)
- Rent a space as opposed to own it
- Identify as an ethnic minority
- Have had various changes to their employment
- Rate their mental wellbeing as very poor or poor

ABILITY TO HEAT HOME



REASONS FOR INABILITY TO HEAT HOME

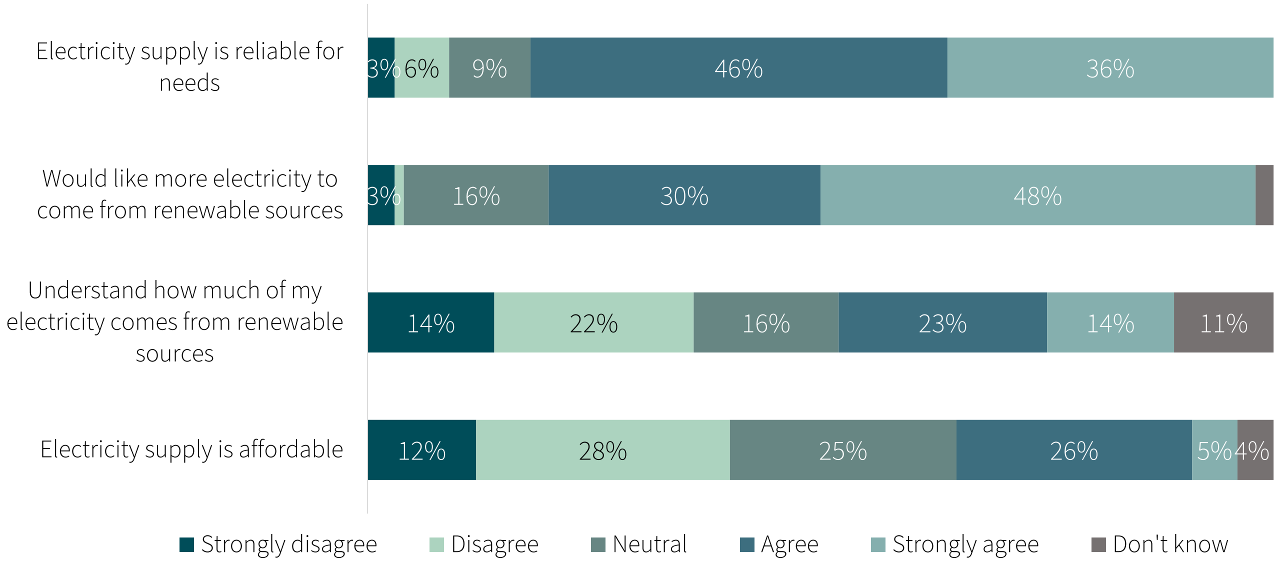


(Base size n=200)

OUR HOMES

This year respondents were asked a series of questions relating to their home's general electricity supply. The majority of respondents agreed (46%) or strongly agreed (36%) that their electricity supply was reliable for their needs, followed by 78% of respondents who agreed (30%) or strongly agreed (48%) that they would like more electricity to come from renewable sources. Concurrently, just 37% of respondents agreed (23%) or strongly agreed (14%) that they understood how much of their electricity comes from renewable sources, while 40% of respondents disagreed (28%) or strongly disagreed (12%) that their electricity supply was affordable.

ELECTRICITY SUPPLY TO HOME



INSIGHTS

After a decrease in home ownership was observed in 2020, the proportion of respondents who owned a home slightly increased this year. While this was a positive shift, other themes pertaining to housing remain constant to previous years. These include unaffordable house prices shutting residents out of the housing market, the perceived low quality of rental properties, and the combination of these two realities causing residents to question their tenure in the district.

Gradual decreases in the proportion of respondents who have resided in the district for more than 10 years since 2018 may be an outward indication of residents being unable to sustain pressures associated with housing.

“Currently we have no way of affording to rent, let alone buy a home big enough for the needs of a growing family within the district. It is one of our key reasons to leave.”

Ultimately, residents’ desires to ‘get ahead’ via home ownership is compromised more so than it would be in other locations. Remaining in the district and financial prosperity were not synonymous for some residents.

One respondent highlighted the following, capturing this sentiment:

“I feel sad that housing has become so expensive. I know people who have gone up against property investors in buying their first home. Of course the property investors are so asset rich that you can’t compete if you aren’t already in the game.”

While home ownership was a major hurdle for some residents, respondents also expressed concerns around the conditions of rental properties. These concerns primarily related to a sense of landlord neglect, especially around adequately warm housing.

“So many existing homes are single glazed and have the minimum insulation. The homes are terrible and cold. I wake up to under 10 degrees in my bedroom every morning. It’s not a nice way to live”

These worries have been raised in previous years, with the primary issue being that inadequate regulations around these matters hold landlords and the calibre of their properties to a low standard. Improved, area-specific regulations would aid in improving this issue. That is, what may be deemed warm and acceptable in a northern location is not deemed equal in the cooler Queenstown Lakes District climate.

“I think the standard of insulation should be much higher.”

While poorly maintained homes were one reason for a lack of warmth, so too was the cost associated with heating.

“Poor insulation causes a massive waste of energy and money trying to heat it.”

This year, there was a significant decrease in the proportion of respondents who were able to heat their home sufficiently. When those who were unable to heat their home were asked about the barriers to doing so, affordability was the main barrier. While an array of comments offered by respondents reiterated the true extent of the cost barrier, one respondent stated:

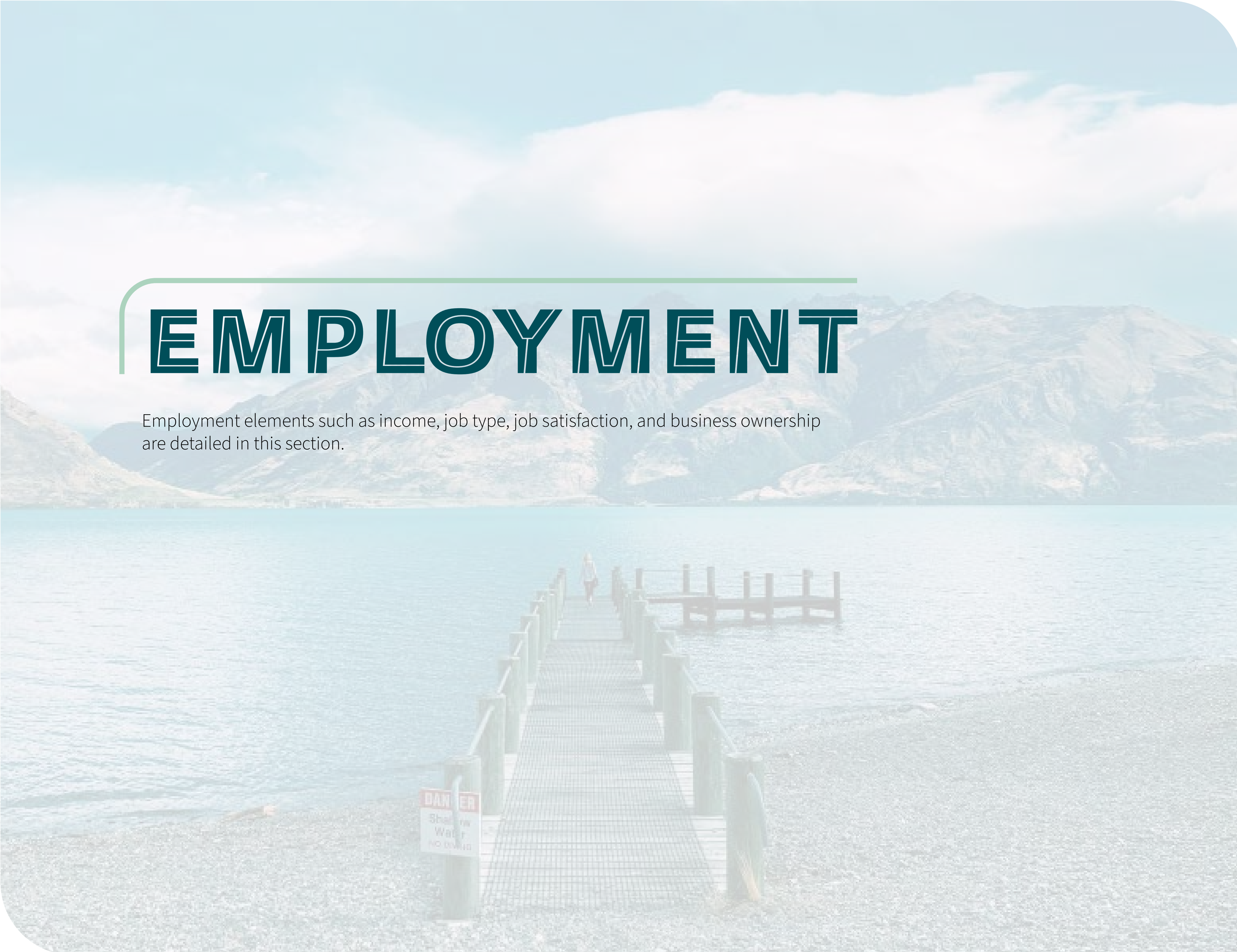
INSIGHTS

"Our power bill over winter for two adults and one baby averaged $550. That's pretty tough with just one income. When we had 6 adults living in the same property five years ago it was more like $450. I have lived in this home which is owned by my parents since 2009. The price to run the home has increased so much."

Perhaps the most alarming part of this example is that affordability has by far been the main barrier to home heating for the last four years. Yet, as exemplified here, price increases only exacerbates and worsens this barrier. Furthermore, there is a disproportionate burden on ethnic minorities who battle with the inability to heat their home.

EMPLOYMENT

Employment elements such as income, job type, job satisfaction, and business ownership are detailed in this section.

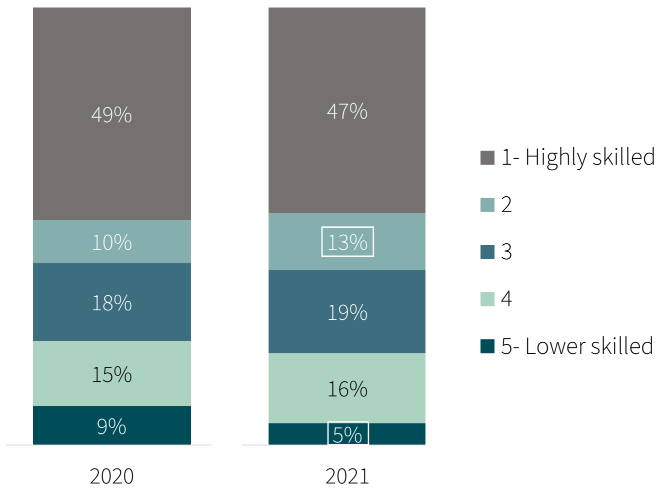


WORK AND INCOME

Just over half of respondents (51%) indicated that they were in full time paid work. This is an increase of 8% compared to 2020 (43%).

Respondents were asked what their current or most recent job occupation was. These responses were then coded into skill levels based on ANZCO* classifications. Somewhat consistent with 2020 (49%), nearly half (47%) of respondents were considered highly skilled, followed by 19% who worked in level three skill-based roles (c.f. 2020, 18%).

SKILL LEVEL



WORKING STATUS

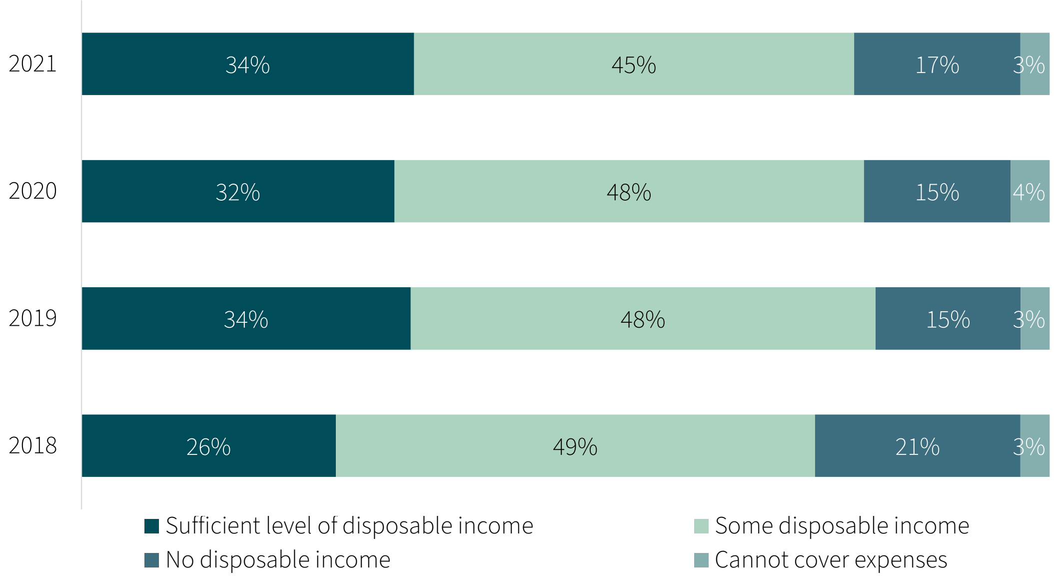
	2019	2020	2021
Full time paid work	47%	43%	51%
Self employed	18%	22%	20%
Part time paid work	13%	15%	14%
Caring for children	3%	4%	5%
Volunteer work	2%	3%	4%
Student	1%	4%	3%
Retired	13%	13%	14%
Not currently in paid employment	-	6%	2%

**The Australian and New Zealand Standard Classification of Occuptations.*

WORK AND INCOME

Income to needs ratios have remained relatively consistent since 2019. That is, the highest proportion of respondents noted that they had some disposable income left after necessary expenses were paid (45%, c.f. 2020, 48%), followed by 34% who indicated they had sufficient levels of disposable income (c.f. 2020, 32%). While slight, there was an increase in the proportion of respondents who said they had no disposable income left after covering their expenses (17% c.f. 2020, 15%).

INCOME TO NEEDS RATIO



Previous years' findings have indicated that minority groups and residents in more challenging circumstances have struggled most with no disposable income. This year's findings showed the same trends, demonstrating that the same people are struggling financially year-on-year. Specifically, those who are not able to cover their expenses or have no disposable income were more likely to:

- Identify as an ethnic minority and/ or hold an essential skills visa
- Work in the tourism and hospitality sector, in a lower skilled role, and find their work unfulfilling
- Have had changes made to their employment
- Identify cost as a barrier to accessing medical professionals
- Rate their mental wellbeing as poor or very poor
- Identify barriers to accessing mental health support

WORK AND INCOME

Tourism and Hospitality continues to be the dominant industry with 21% of respondents indicating they were employed within this sector. However, it should be noted that this proportion has decreased by 6% compared to 2020 (27%). Furthermore, just 8% of respondents indicated that were employed in the Construction industry (c.f. 2020, 15%). This decrease comes after steady yearly growth was observed in this industry between 2018-2020.

Findings show that despite the Tourism and Hospitality sector employing the highest proportion of respondents, there were some challenges which correlate with being employed in this industry. That is, these respondents were more likely to:

- Have had changes to their employment as a result of COVID-19
- Earn a lower income and/or have no disposable income
- Have a lower sense of job security
- Identify cost as a barrier to accessing medical professionals

INDUSTRY*

	2018	2019	2020	2021
Tourism and Hospitality	24%	28%	27%	21%
Professional, Scientific, and Technical Services	10%	14%	9%	11%
Construction	9%	10%	15%	8%
Health Care and Social Assistance	7%	5%	8%	7%
Education and Training	8%	8%	7%	7%
Retail Trade	8%	7%	8%	7%
Public Administration and Safety	3%	8%	7%	6%
Agriculture, Forestry, and Fishing	5%	4%	4%	4%
Information Media and Telecommunications	3%	3%	4%	4%

**Please note that proportions lower than 4% in 2021 are not shown.*

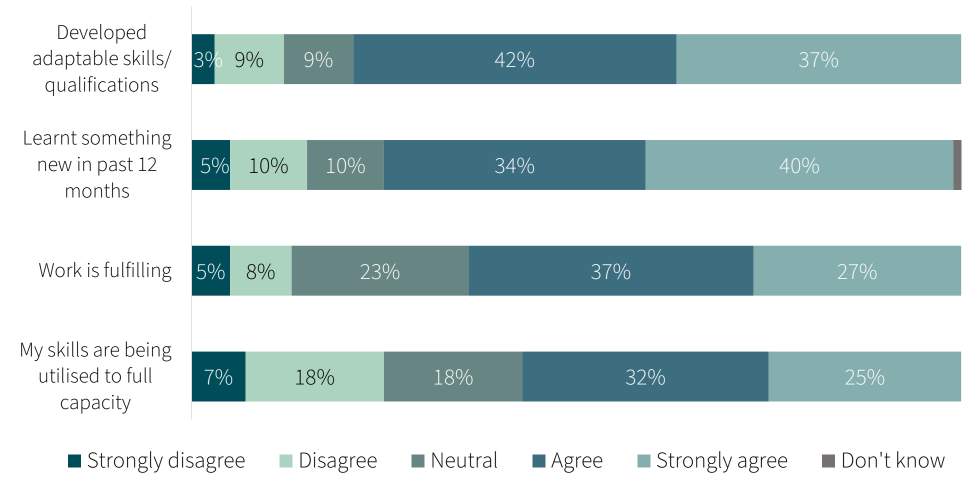
JOB SATISFACTION

Fifty six percent of respondents indicated that they were employed by a business in the district.

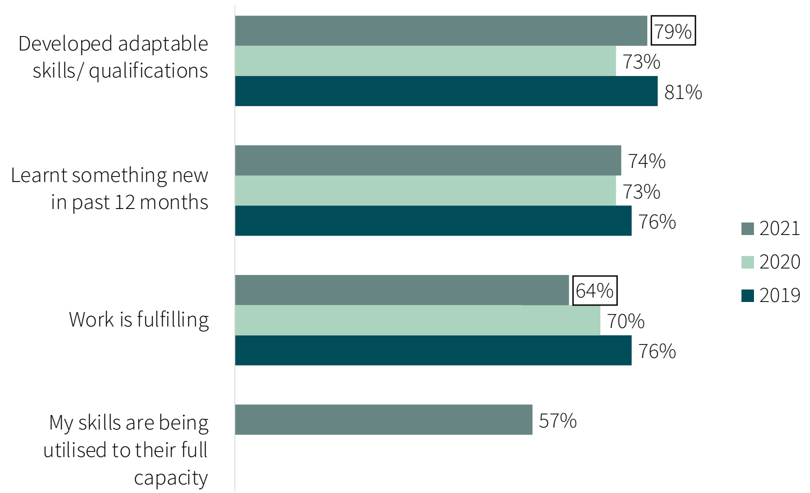
These respondents were asked to rate their agreement with a series of statements relating to their work situation. The highest proportion of respondents agreed (42%) or strongly agreed (37%) that they had developed adaptable skills/qualifications in their current role (c.f. 2020, 73%). Notably, less than two thirds (64%) of respondents agreed (37%) or strongly agreed (27%) that their work was fulfilling. This is a 6% decrease since 2020 (70%), and a 12% decline since 2019.

Respondents who were using their skills to full capacity, had learnt something new within their role, and had developed applicable skills or qualifications were more likely to find their current job fulfilling. Thus, while income may be a determinant of job fulfillment, the elements which contribute to job satisfaction appear to be multi-faceted.

JOB SATISFACTION



ANNUAL TRENDS: TOTAL AGREE



(Base size n=534)

BUSINESS

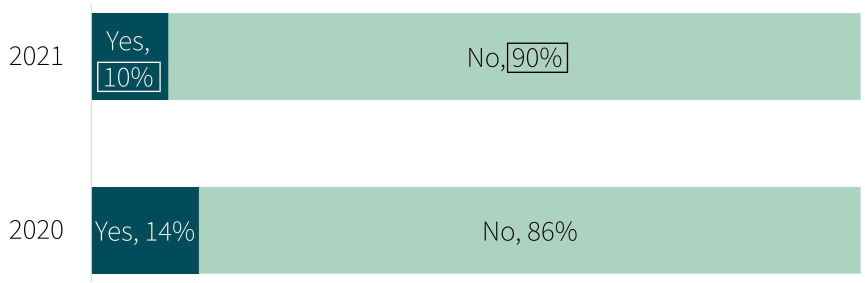
Ten percent of respondents indicated that they owned their own business, a significant decrease since 2020 (14%), while 90% of respondents did not own a business. This is a significant increase since 2020 (86%).

Of those who owned a business in the district, nearly three quarters (72%) indicated they employed fewer than five staff. This is an increase of 7% compared to 2020 (65%). Concurrently, the proportion of business owners who employed 11-29 staff members also increased (16% c.f. 2020, 10%). These increases have been offset by a decrease in the proportion of business owners who employed 6-10 staff members (7% c.f. 2020, 20%).

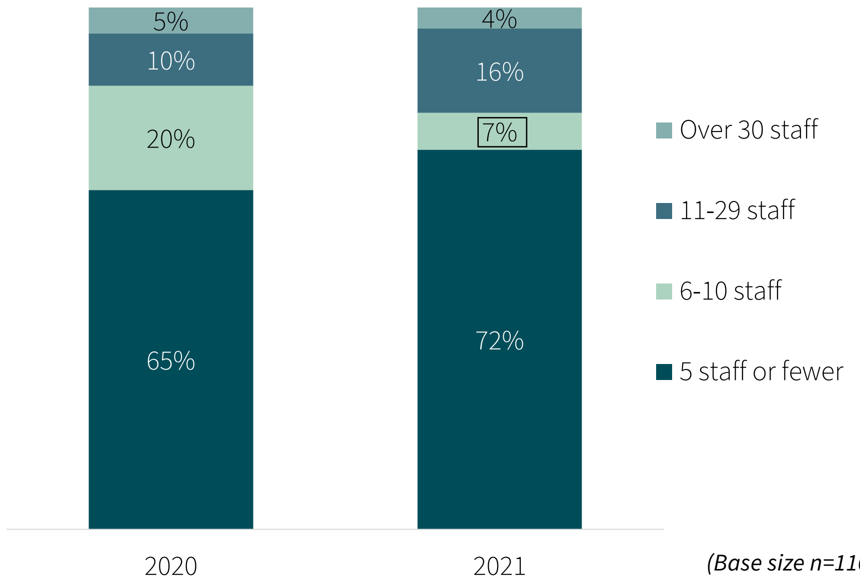
These increases from 6-10 staff members to 11-29 staff members has predominantly been seen in the tourism and hospitality sectors, retail trade.

Notably, the number of staff members employed by businesses in the construction industry appeared to decrease since 2020.

BUSINESS OWNERSHIP



NUMBER OF STAFF



(Base size n=110)

INSIGHTS

Given the surrounding circumstances of COVID-19, a significant increase in the proportion of respondents who are employed full time (even higher than pre-COVID-19 levels) is positive.

Despite this positive outcome for employees, the proportion of respondents who owned businesses decreased significantly compared to 2020. Presumably, this is a result of business closures due to COVID-19 and suggests that business owners may be under considerable pressure.

While there were instances where residents and business owners were prospering within their employment space, the same people who were struggling four years ago continue to struggle today. This suggests that further work is needed to address the complex challenges faced by these people (i.e. lower income, lower skillset, and younger in age etc.).

This observed struggle was often raised in light of income whereby there was a real imbalance between minimum wage and the living wage.

"It's disappointing to see how many employers still offer below the living wage."

"Hospitality, retail, and other need at the living wage."

Last year saw a decrease in the proportion of respondents who had development and upskilling opportunities presented to them through their employment. This year, and presumably as a result of the initial impacts of COVID-19 subsiding and recovery initiatives taking effect, more respondents encountered such opportunities. While there was a decrease in the proportion of respondents who found their work fulfilling, further insights showed that the upskilling and development of individuals contributed to work fulfillment. Thus, as employers seek out ways to invest in employees' development, job fulfillment ought to increase.

It is interesting to note that job fulfillment was much lower amongst respondents who worked in the Tourism and Hospitality industry. Although there were a range of elements at play which contributed to job fulfillment, there were enough findings to suggest that insufficient pay was one of them.

"People are not paid what they are worth."

The challenge of paying a living wage is compounded throughout the local economy by high house prices, electricity, and general living costs.

"Incomes are not proportionate to housing costs and cost of living in the district"

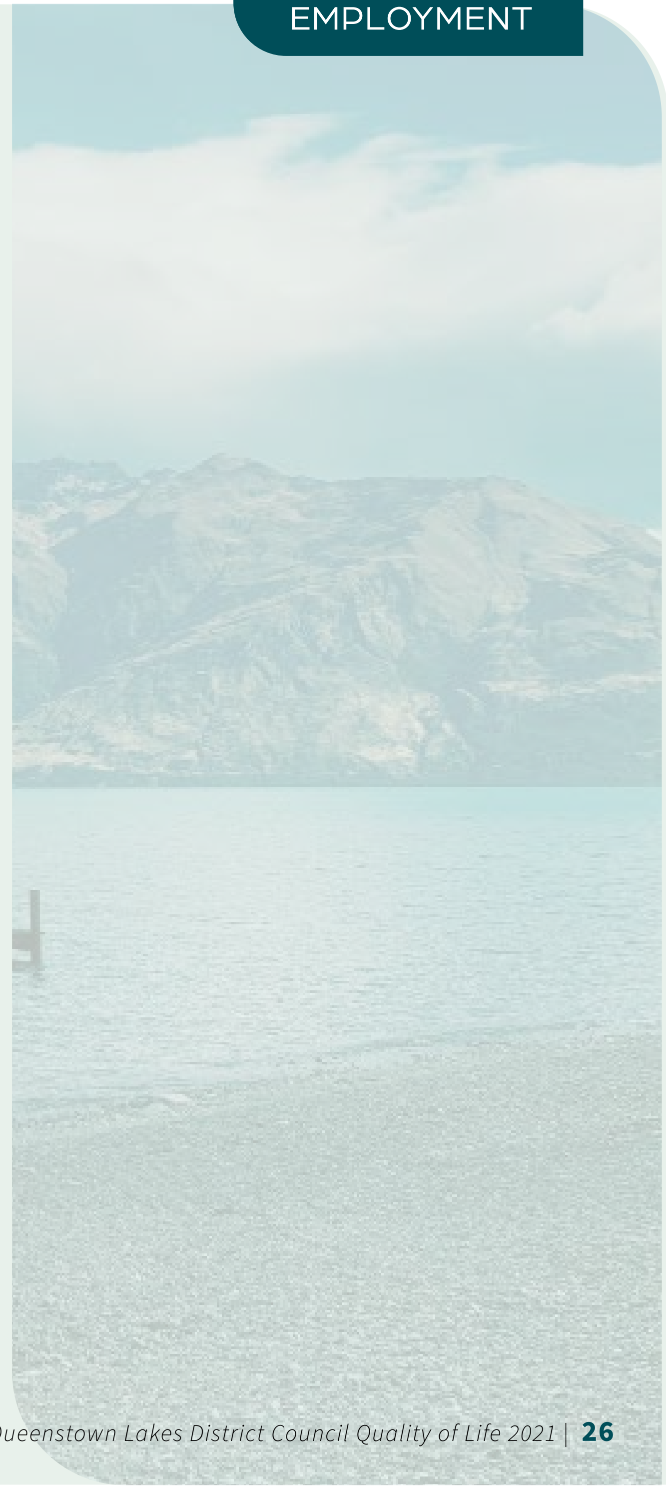
Respondents also highlighted the perception that job opportunities and career growth were limited in the district.

"The range of jobs is limited in the district, so by default many people stay in existing roles for a long time, not because they get well paid or they enjoy it, because there are not many other options."

INSIGHTS

Some respondents felt that the diversification away from, and minimised reliance on, the Tourism and Hospitality industry would aid in widening the scope and amount of job opportunities in the district.

"Not a lot of variety of jobs and the area is still focused on hospitality and tourism so there is no job security even if you get a job."



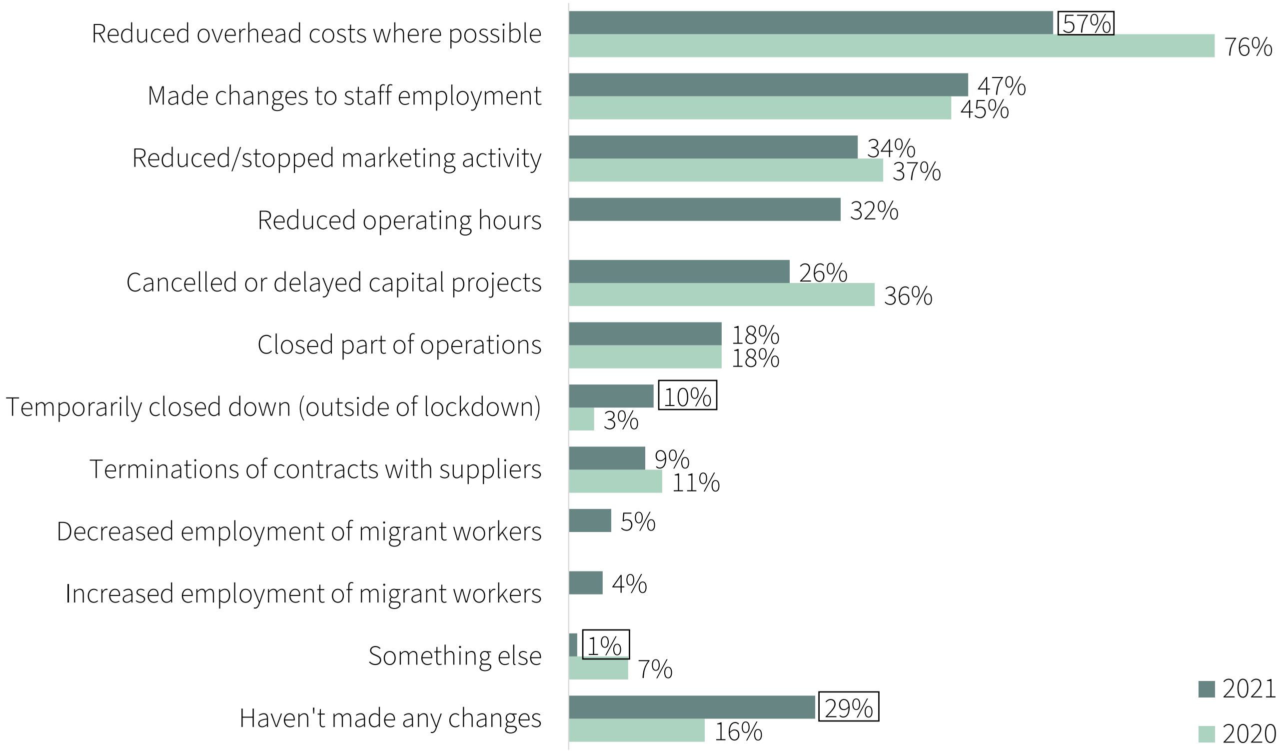
COVID-19

Focusing on the degree to which COVID-19 has had an impact on residents, this section looks at areas such as employment and wellbeing with regards to COVID-19.

COVID-19 IMPACTS

Local business owners (10%) were asked what changes, if any, they had made to their business as a result of COVID-19. Twenty nine percent of business owners indicated that they made no changes (c.f. 2020, 16%) this year. Positively, most comparable measures indicated that since last year, fewer changes have been made to business, e.g. reduction of overhead costs (57% c.f. 2020, 76%). However, there has been a slight increase in the proportion of respondents who have made changes to staff employment (47% c.f. 2020, 45%) and closed down temporarily (10% c.f. 2020, 3%). It should be noted that 32% of business owners stated they had reduced their operating hours.

CHANGES MADE TO BUSINESS



(Base size n=110)

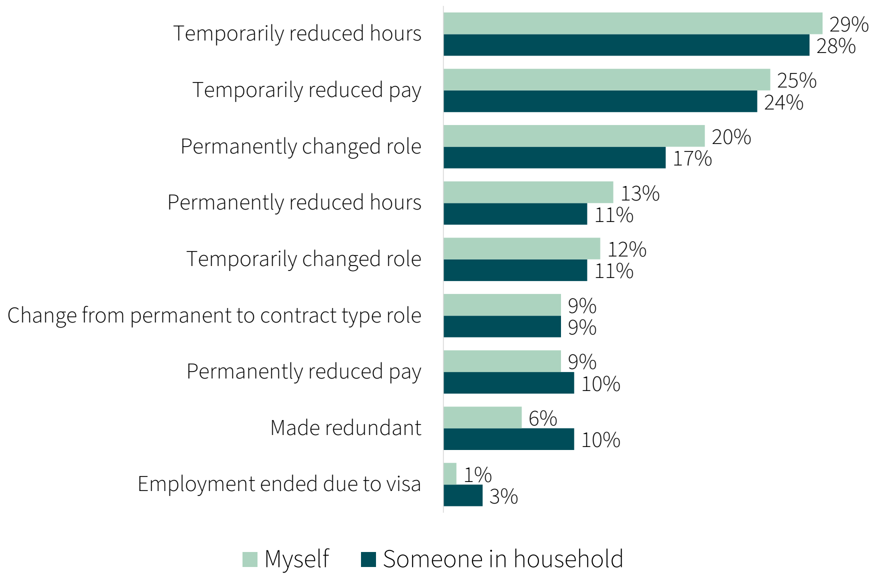
Though not statistically significant, business owners with 10 staff members or fewer were more likely to have implemented changes to their business in the last 12 months. Furthermore, those who had made changes to their business were significantly less likely to rate their quality of life as good or very good.

COVID-19 IMPACTS

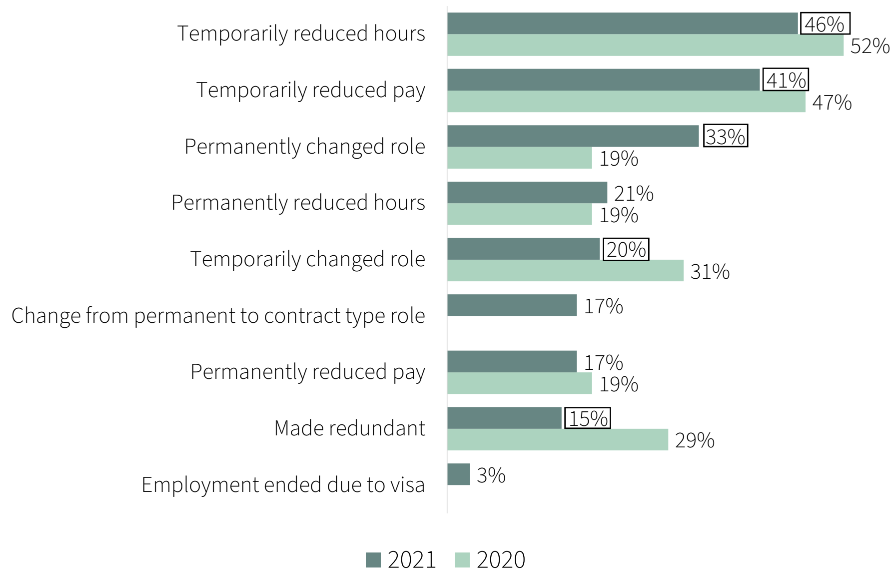
Respondents employed by a business in the district (56%) were asked what changes, if any, had been made to their employment situation. The most common change was a temporary reduction in hours with 29% of respondents indicating they had encountered this change, and a further 28% indicating someone in their household had.

Postively, yearly trends indicate that for most measures, there has been a decrease in the proportion of respondents reporting changes to their employment and/or the employment of others in their household. However, increases have been observed for the proportion of respondents who reported a permanent change in their role and/or someone else in their household (33% c.f. 2020, 19%), as well as permanently reduced hours (21% c.f. 2020, 19%), although not significant.

CHANGES TO EMPLOYMENT



ANNUAL TRENDS: MYSELF AND/OR SOMEONE IN HOUSEHOLD



(Base size n=534)

**Please note, these findings show the proportion of respondents who noted a change in employment for either themself and/or someone else in their household*

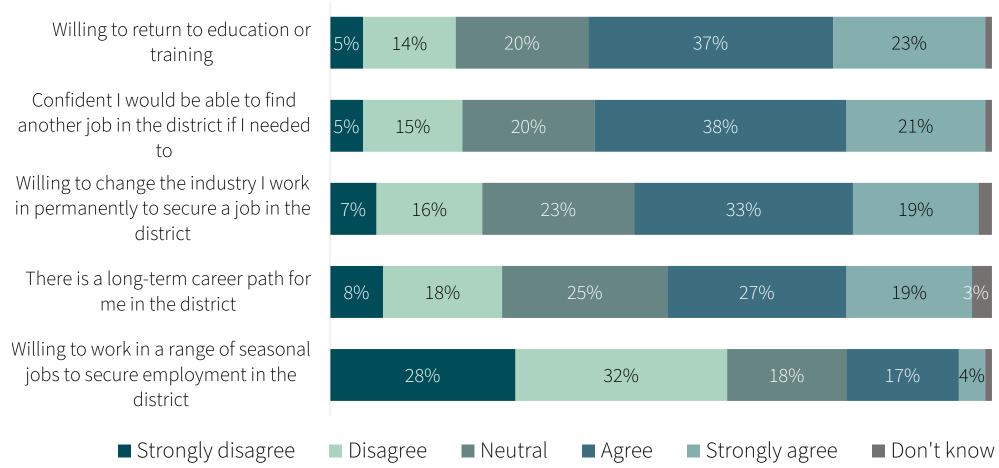
COVID-19 IMPACTS

This year, respondents appeared more optimistic towards their ability to be dynamic in securing employment in the district. That is, across most measures relating to upskilling and finding work, overall agreement increased when compared to 2020. Specifically, respondents' willingness to return to education or training increased by 9% (60% c.f. 2020, 51%).

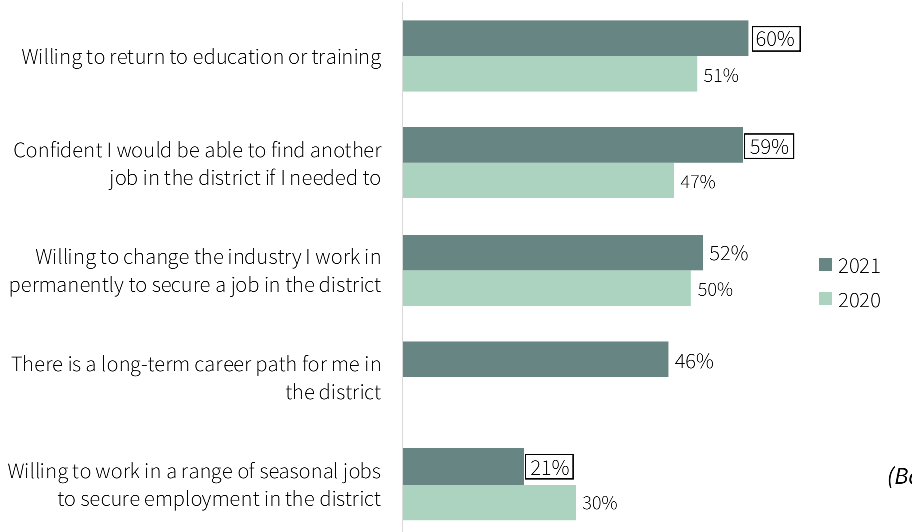
There was one exception being that only 21% of respondents were willing to work in a range of seasonal jobs to secure local employment (c.f. 2020, 30%).

Respondents in a lower income bracket and who were younger in age were more likely to be open to returning to education and training in order to secure a job.

ABILITY FIND WORK/UPSKILL



ANNUAL TRENDS: TOTAL AGREE

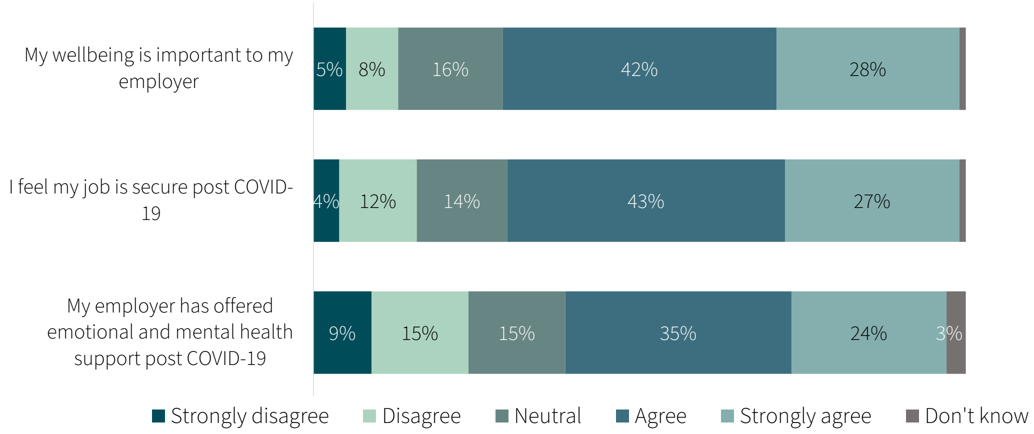


(Base size n=534)

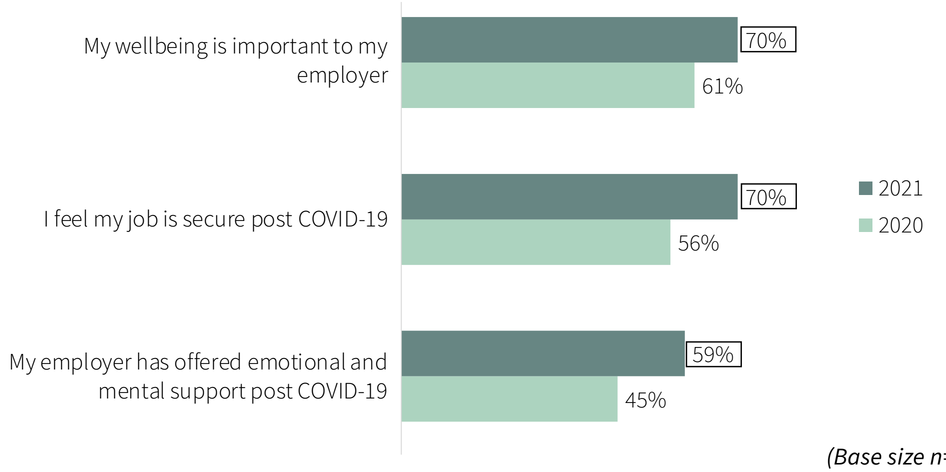
COVID-19 IMPACTS

Wellbeing measures at work have improved across the board with 70% of respondents agreeing (42%) or strongly agreeing (28%) that their wellbeing was important to their employer (c.f. 2020, 61%), while another 70% of respondents agreed that their job was secure post COVID-19 (c.f. 2020, 56%). Though the lowest proportion of respondents agreed that their employer had offered emotional and mental support post COVID-19 (59%), this proportion has increase by 14% when compared to 2020 (45%).

WELLBEING AT WORK



ANNUAL TRENDS: TOTAL AGREE



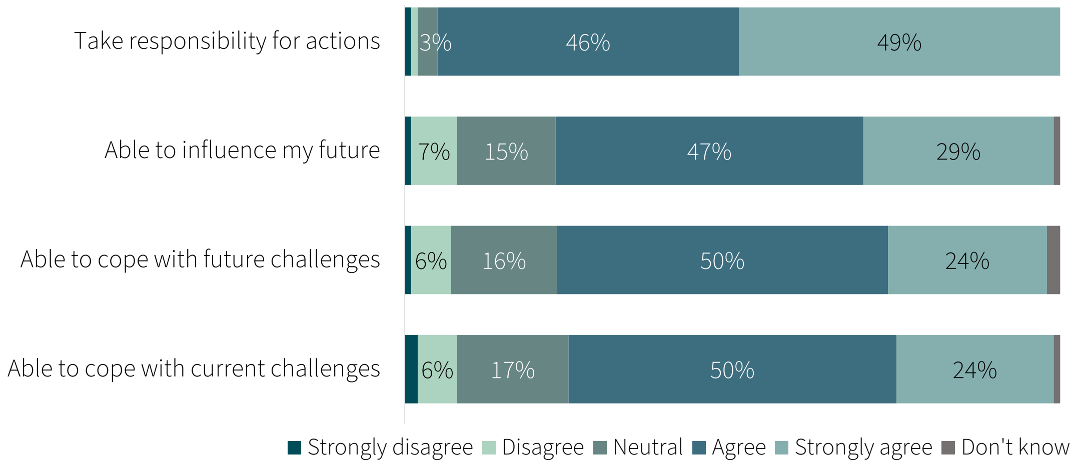
(Base size n=534)

COVID-19 IMPACTS

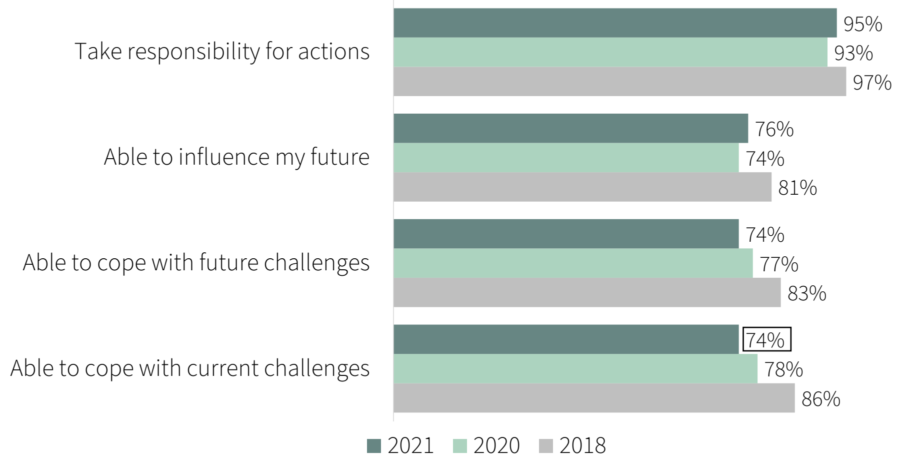
While there has been an increase in the proportion of respondents who agreed that they took responsibility for their actions (95% c.f. 2020, 93%) and that they were able to influence their future (76% c.f. 2020, 74%), fewer respondents agreed that they were able to cope with future (74% c.f. 2020, 77%), and current challenges (74% c.f. 2020, 78%).

These findings suggest that while respondents were more willing to take practical approaches to adjust their circumstances (responsibility for actions and influencing future), there was still an overwhelming sense of uncertainty regarding their ability to cope with unknown future challenges as well as current challenges.

RESILIENCE: ACTIONS



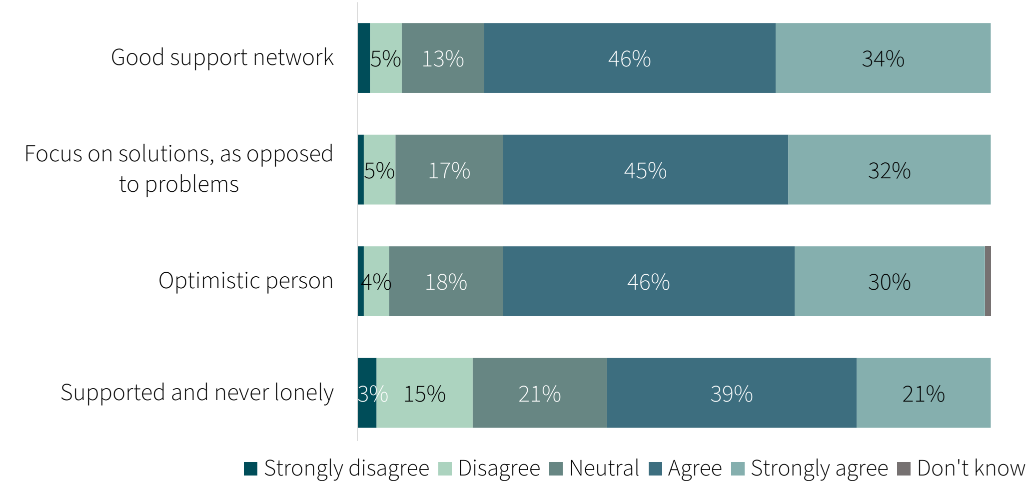
ANNUAL TRENDS: TOTAL AGREE



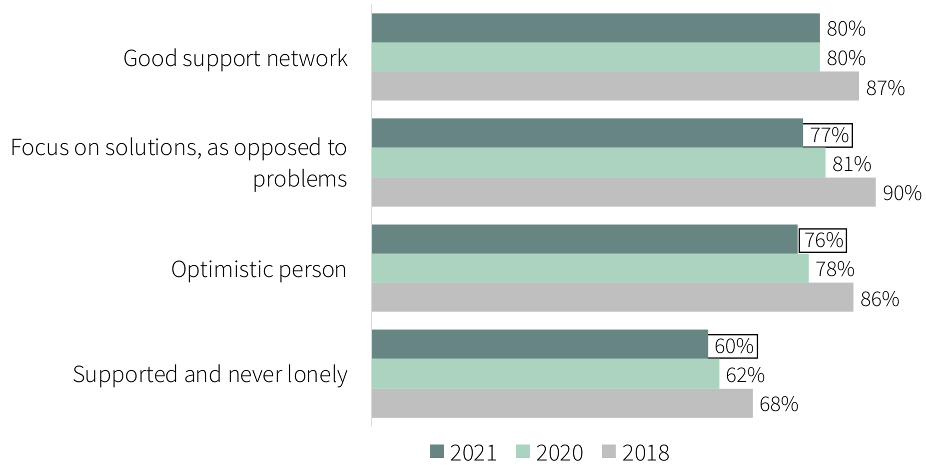
COVID-19 IMPACTS

Consistent with last year, 80% of respondents agreed that they had a good support network, while just over three quarters (77%) of respondents agreed that they focussed on solutions, as opposed to problems (c.f. 2020, 81%).
At a lower level, 76% of respondents agreed that they were an optimistic person (c.f. 2020, 78%), while a further 60% agreed that they were supported and never lonely (c.f. 2020, 62%).

RESILIENCE: MENTAL/NETWORK



ANNUAL TRENDS: TOTAL AGREE



RESILIENCE

With purpose of understanding what factors challenge and support a person's ability to be resilient, respondents were grouped into 'less resilient' (those who disagreed or strongly disagreed with most resilience measures) and 'resilient' (those who agreed or strongly agreed with most resilience measures) for the below analysis. Findings showed that if respondents agreed or disagreed with one resilience measure, they were more likely to answer in the same way for the other resilience measures.

Less resilient

These respondents were more likely to:

Home and employment
- Have an income of less than $60,000
- Struggle heating their home
- Rent their home/space
- Find their work unfulfilling

Health and belonging
- Rate their mental wellbeing as poor or very poor
- Have accessed a range of mental health services
- Be unsure whether they intend on staying in the district

Resilient

These respondents were more likely to:

Home and employment
- Be 55 years of age or older
- Own their home
- Have an income of more than $100,000
- Find their work fulfilling

Health and belonging
- Rate their mental wellbeing as good or very good
- Intend on staying in the district

INSIGHTS

There was an increase in the proportion of business owners who reported not having to make changes to their organisation in the past 12 months as a result of COVID-19. Concurrently, and across most measures, the proportion of respondents who reported changes to their job or the job of someone else in their household also decreased.

This year, fewer respondents expressed levels of uncertainty around job security. This suggests a greater sense of clarity following the initial unsettling impacts of COVID-19. This sense of clarity does not necessarily correspond with positive outcomes for individuals, but offers some stability with what the future might hold for affected residents. For example, the proportion of respondents who saw permanent changes to their role and/or hours as a result of COVID-19 increased when compared to 2020. Thus, while the change to their role/income/hours may not be positive, there is more certainty around their employment status going forward.

While the true impacts of COVID-19 are likely yet to be realised, fewer respondents commented on COVID-19 or how it has personally affected them.

Of the respondents who did make comments about COVID-19, the majority were business owners and/or self-employed who were dealing with the mid to long-term implications of the pandemic.

“COVID-19 with the lockdowns and closed borders have greatly reduced our business and income. We are both on the wage subsidy.”

As articulated under the employment section, Queenstown Lakes District has a tourism dependent economy. Thus, while the previous comment was shared by just one respondent, it likely represents many local businesses, whereby these businesses will continue to suffer until tourism is able to operate under normal circumstances.

“Very worrying times, especially with so much relying on construction/ tourism.”

Despite fewer respondents noting the impacts of COVID-19, there were some individuals and households who continued to experience the threats posed by the pandemic. Though not as heightened as 2020, some respondents referenced their ongoing difficulties of having had changes made to employment matters and the financial burdens that have come with such changes.

“I was made redundant during COVID-19. I was not able to get a job in the district. I am now retraining and will be working outside of the district.”

Again, this stresses the need to diversify the local economy. Doing so will open up job opportunities when one industry (in this case, predominantly Hospitality and Tourism) becomes strained.

“I enjoy the tourism industry but there are not many options for work in the region.”

As it pertains to the resilience measures, agreement ratings were generally consistent or slightly lower than 2021. Thus, indicating that there are ongoing challenges caused by the uncertainty of COVID-19.

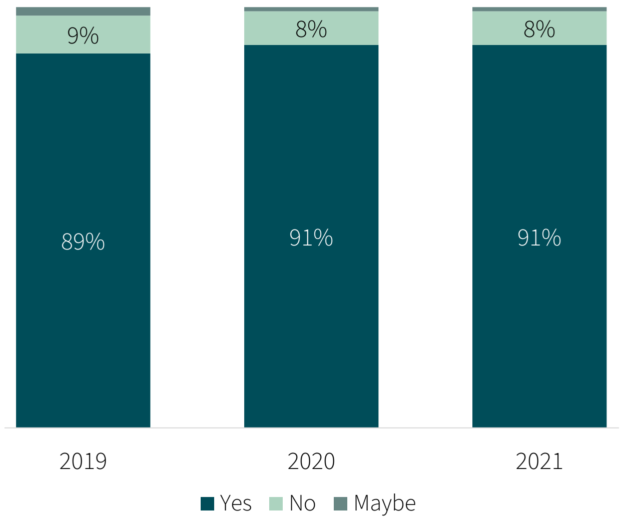
HEALTH

The accessibility to a range of health care services and facilities, along with the barriers to these services are outlined in this section.

MEDICAL PROFESSIONALS

Similar to last year, 91% of respondents said they were registered with a doctor while 8% of respondents were not.

REGISTERED WITH A DOCTOR



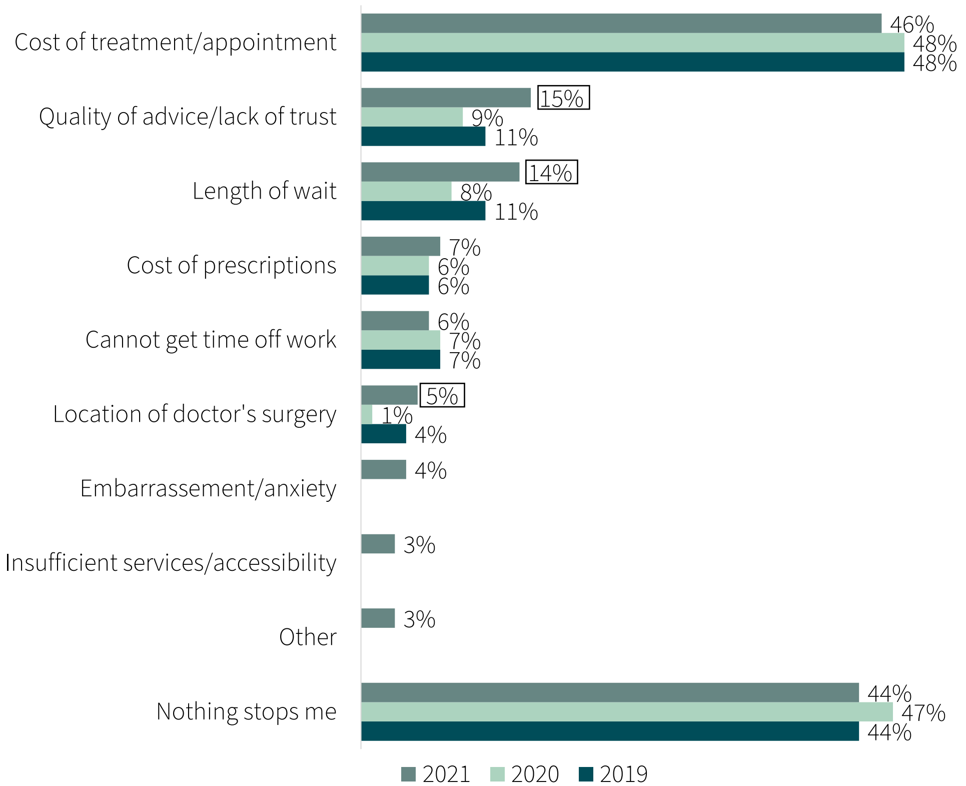
While most respondents were registered with a doctor's surgery, there were a number of attributes associated with those who were not. Respondents who were not registered were more likely to:

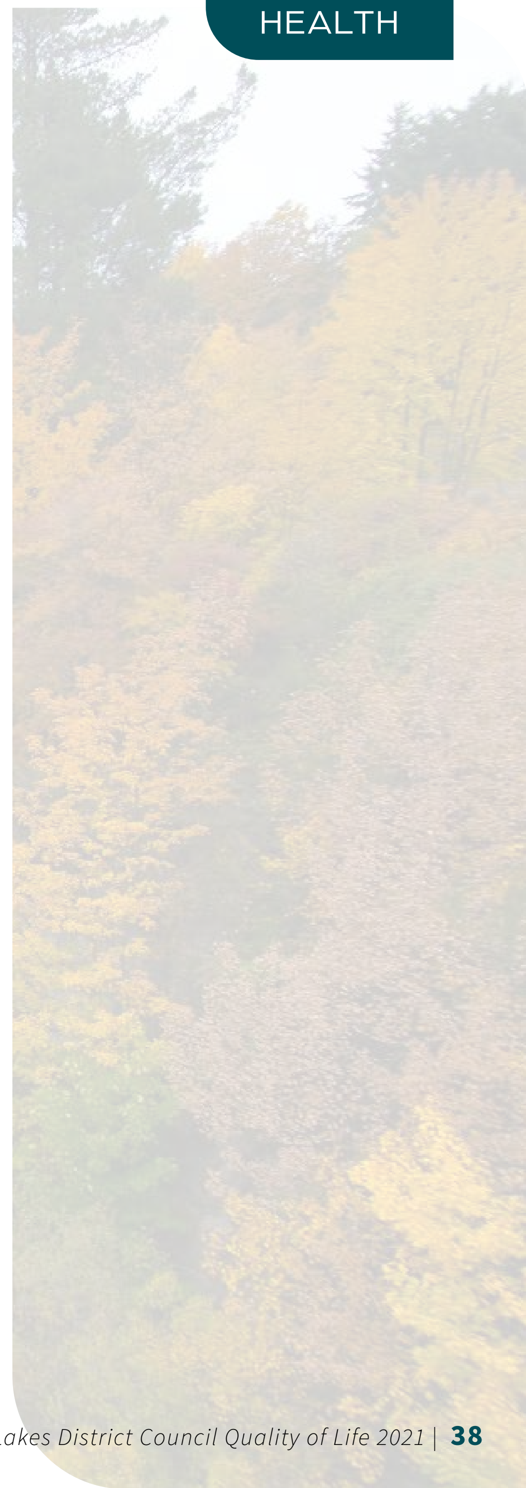
- Identify as Māori or another ethnicity
- Rent their home/space
- Have lived in the district for less than two years
- Live with non-relatives
- Be unable to heat their home

MEDICAL PROFESSIONALS

This year, there was a decrease in the proportion of respondents who said nothing stops them from accessing a medical professional (44% c.f. 2020, 47%). Of those who did encounter barriers to accessing such care, cost of treatments/appointments continues to be the main barrier (46% c.f. 2020, 48%), followed by the quality of advice and/or lack of trust (15% c.f. 2020, 9%). Notably, 14% of respondents noted wait time as a barrier to accessing medical professionals, a significant increase since last year (8%).

BARRIERS TO ACCESSING MEDICAL PROFESSIONALS



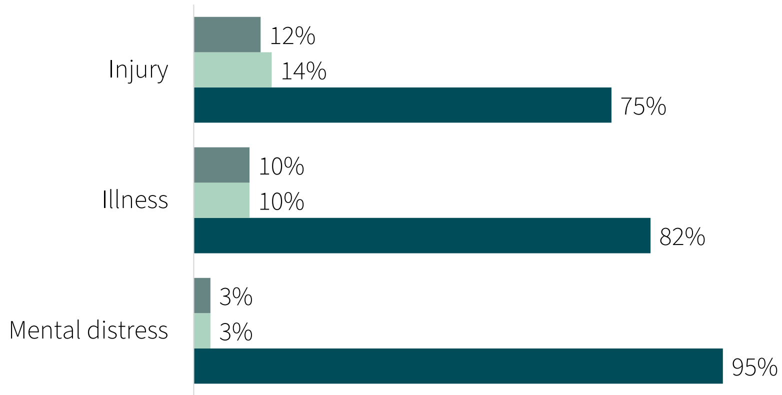


MEDICAL EMERGENCIES

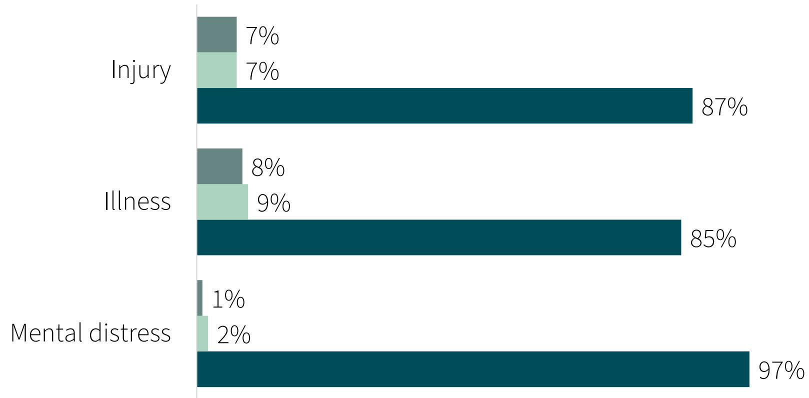
When asked about their personal use of the emergency department, 12% of respondents said they used it for an injury, 10% indicated they used it for an illness, while 3% used it for mental distress. When asked about their household's use of the emergency department, 14% said someone in their household used it for an injury, 10% used it for an illness, and 3% accessed it for mental distress.

Seven percent of respondents personally used the afterhours services for an injury, followed by 8% of respondents who used it for an illness, and 1% who accessed it for mental distress. When speaking on behalf of others in their household, 7% of respondents indicated they had accessed the afterhours services for an injury, 9% had done so for an illness, and 2% had done so for mental distress.

USE OF EMERGENCY DEPARTMENT



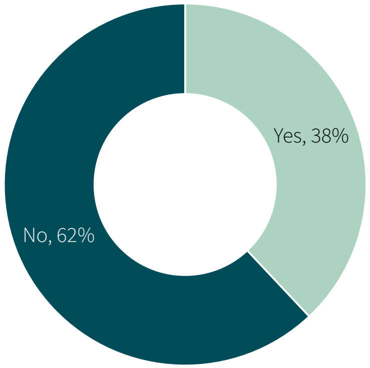
USE OF AFTERHOURS SERVICES



For myself Someone else No

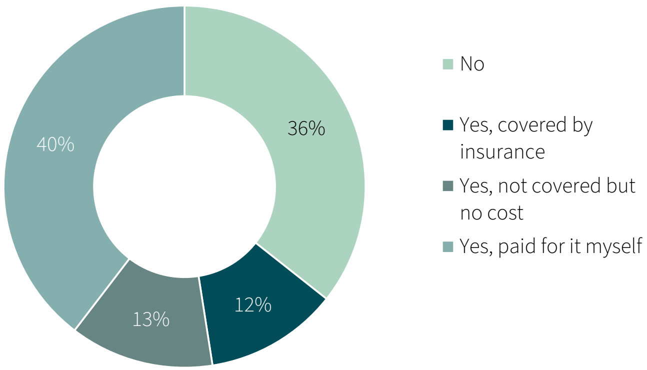
EXTERNAL SERVICES

TRAVELLED FOR MEDICAL SERVICES



Thirty eight percent of respondents indicated they had travelled outside of the district for medical services.
Of those who had travelled outside of the district for medical services, over two thirds (68%) had done so for an appointment with a specialist.
Thirty six percent of respondents who accessed services outside of the district indicated that they did not spend nights outside of the district receiving their care, while 40% said they did spend nights and paid for it themselves.

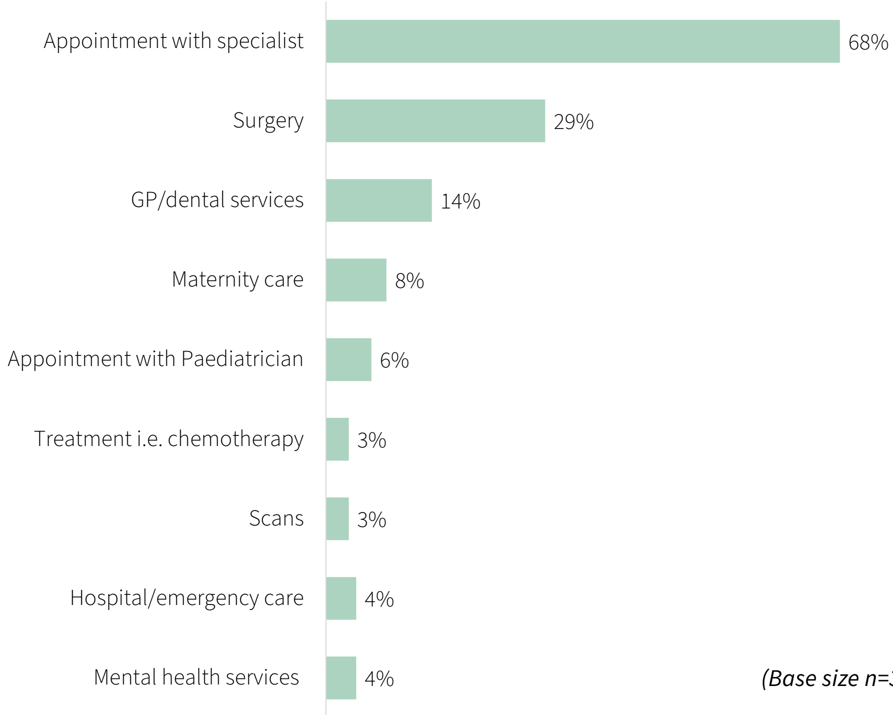
SPENT NIGHTS OUTSIDE OF THE DISTRICT



(Base size n=396)

**Please note that due to a different measurement approach taken, yearly trend data is not available for this measure.*

SERVICES ACCESSED*

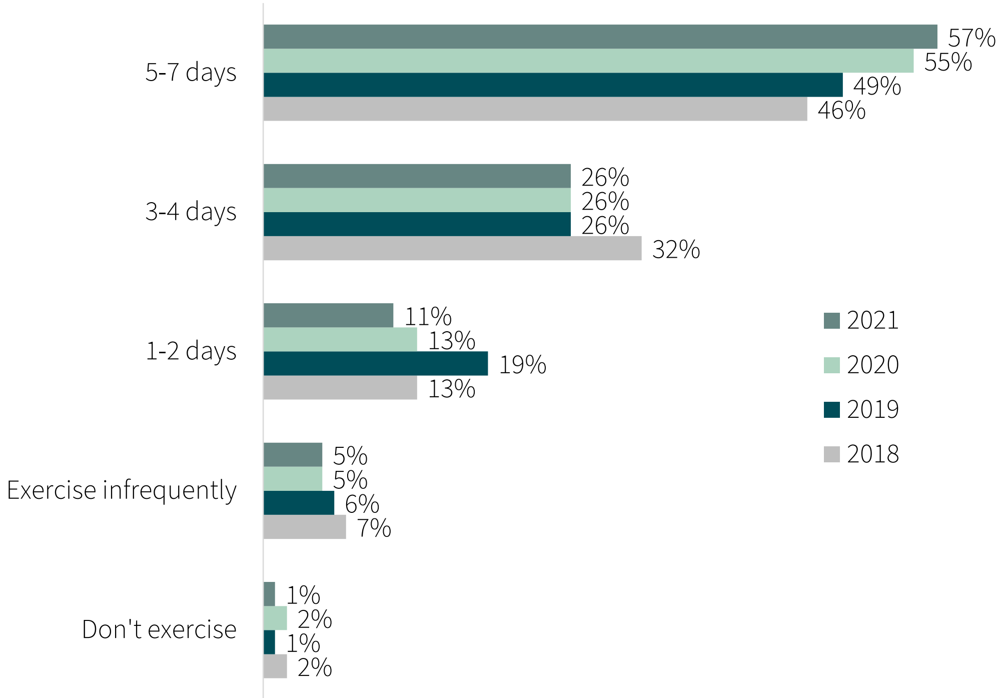


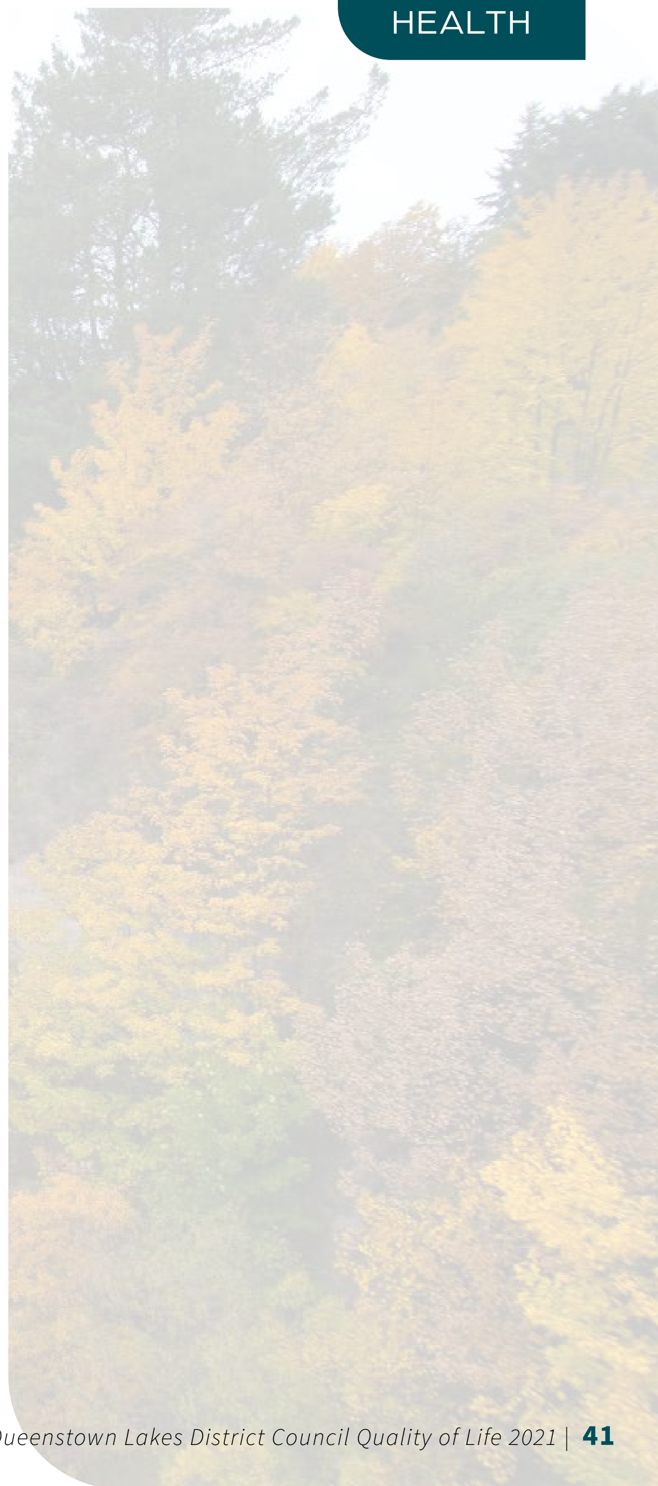
(Base size n=396)

EXERCISE

Residents in the district continue to be relatively active with over half (57%) of respondents indicating that they exercise 5-7 days per week. The proportion of respondents exercising this frequently has steadily grown since 2018. Concurrently, just 1% of respondents indicated that they do no exercise (c.f. 2020, 2%).

DAYS SPEND EXERCISING





INSIGHTS

Findings from this study show that for the most part, very little stands in the way of residents accessing medical assistance. A high proportion of residents who were registered with a doctor further supports this. Despite this acknowledgment, there were barriers that still exist, and beyond the cost of treatments and appointments being the main barrier, comments from respondents highlighted the perceived inadequate number of services available to meet growing population needs.

“Surely we can recognise the growth of this small city and begin building a real hospital for all our needs. All the band-aiding is incredible.”

“I strongly believe that the health services here are not adequate for the population.”

This concern is not new, in fact it has been a theme highlighted in previous years. This gap in the healthcare system has an impact on the service offerings to residents.

Specifically, the lack of medical facilities and resources has a perceived flow on effect to the quality of services provided. Increased pressure on the existing facilities and resources to cater to the increasing population results in a diminished quality of the services provided, or so some respondents felt.

“Doctors seem too busy and have never been in touch regarding follow ups.”

Respondents also expressed concerns around the accessibility of services, often stating that the perceived insufficient number of services means it is extremely difficult to access services in a timely manner.

“The access to health services in the Queenstown Lakes district is abysmal.”

These stretched services limiting residents’ accessibility means people end up looking elsewhere to access their needed services. More often than not, this meant travelling outside of the district to do so.

“…having to take my son to Auckland/Dunedin [for care] is a real issue associated with living in this region.”

Access to services outside the district increased across the board when compared to last year (e.g. maternity care, hospital care, specialist appointments etc.). This reiterates the above issue, that so long as there are inadequate services available, residents will continue to be burdened with the stress of needing to source care elsewhere. For some respondents, this predicament may mean needing to relocate.

“After excessive tourism, the most likely reason for us to leave the district is the lack of access to specialist healthcare.”

“It [lack of resources and facilities] is the most disappointing thing about living here.”

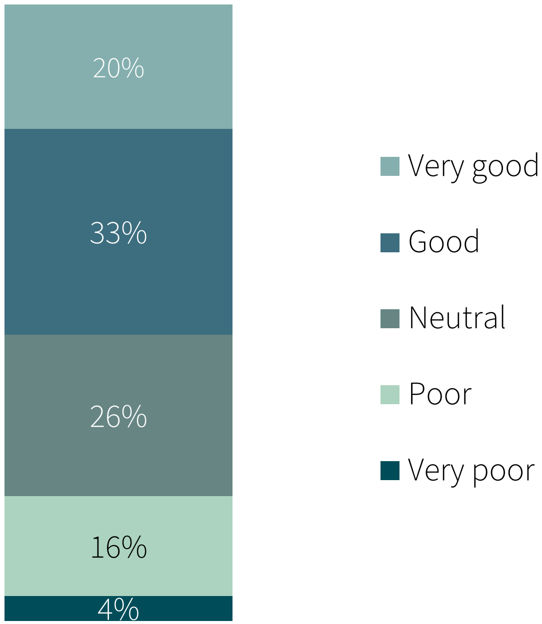
COMMUNITY SUPPORT

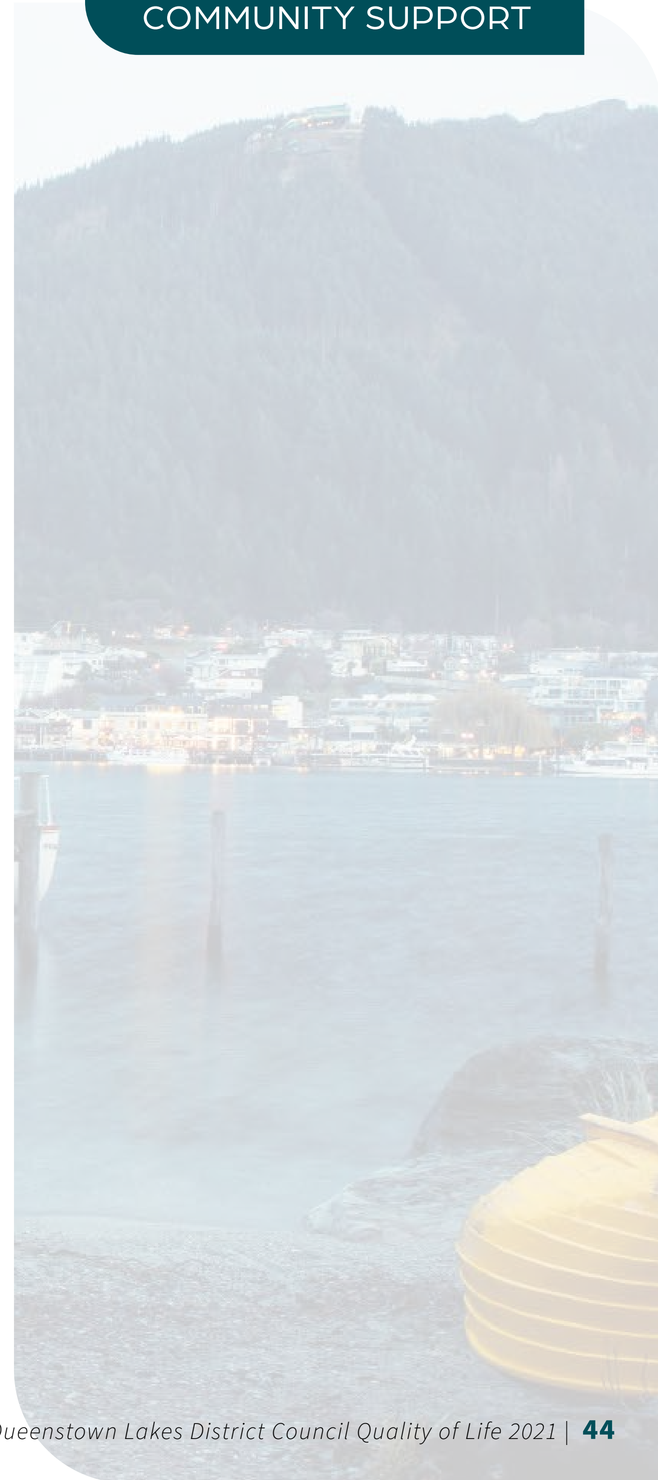
With a focus on mental health and wellbeing, this section outlines mental health services that have been accessed by residents and key barriers that might prevent such accessibility.

WELLBEING

Just over half (53%) of respondents rated their mental wellbeing as good (33%) or very good (20%). A further twenty six percent of respondents said their mental wellbeing was neither good, nor poor. One fifth of respondents rated their mental wellbeing as poor (16%) or very poor (4%).

MENTAL WELLBEING





WELLBEING

The following analysis identifies key trends amongst those who have an overall poor (poor and very poor ratings) and an overall good (good and very good ratings) mental wellbeing, with the aim of understanding what factors might correlate with residents' mental health.

Poor mental wellbeing

These respondents were more likely to:

Demographics, home, and employment

- Be aged 39 years or younger
- Identify as an ethnic minority
- Live with non-relatives
- Rent their home/space
- Be unable to heat their home
- Have no disposable income or be unable to cover expenses
- Be in full time paid work and/or in the public administration and safety industry
- Have lower levels of job satisfaction (i.e. career development, fulfilment, and skill utilisations)

Health and belonging

- Identify cost and an inability to take time off work as barriers to accessing medical professionals
- To have accessed mental health services (i.e. doctors, psychologist etc.)
- Disagree that mental health services are accessible
- Have lower levels of engagement with their neighbourhood and view their neighbourhood in a negative light

Governance and quality of life

- Cite barriers to community facility use, of which lack of accessibility or inconvenience are the mains ones
- Rate their quality of life as poor, extremely poor, or average

WELLBEING

Good mental wellbeing

These respondents were more likely to:

Demographics, home, and employment

- Be aged 55 years or older
- Intend on staying in the district
- Live with their partner or spouse
- Own their own home
- Have sufficient levels of disposable income
- Have higher levels of job satisfaction (i.e. career development, fulfilment, and skill utilisations)

Health and belonging

- Be registered with a doctor and have no barriers to accessing medical professionals
- Really enjoy the district's cultural events
- To have higher levels of engagement with their neighbourhood and view their neighbourhood in a positive light
- Be unsure whether mental health services are accessible
- Agree they feel a sense of pride in the district

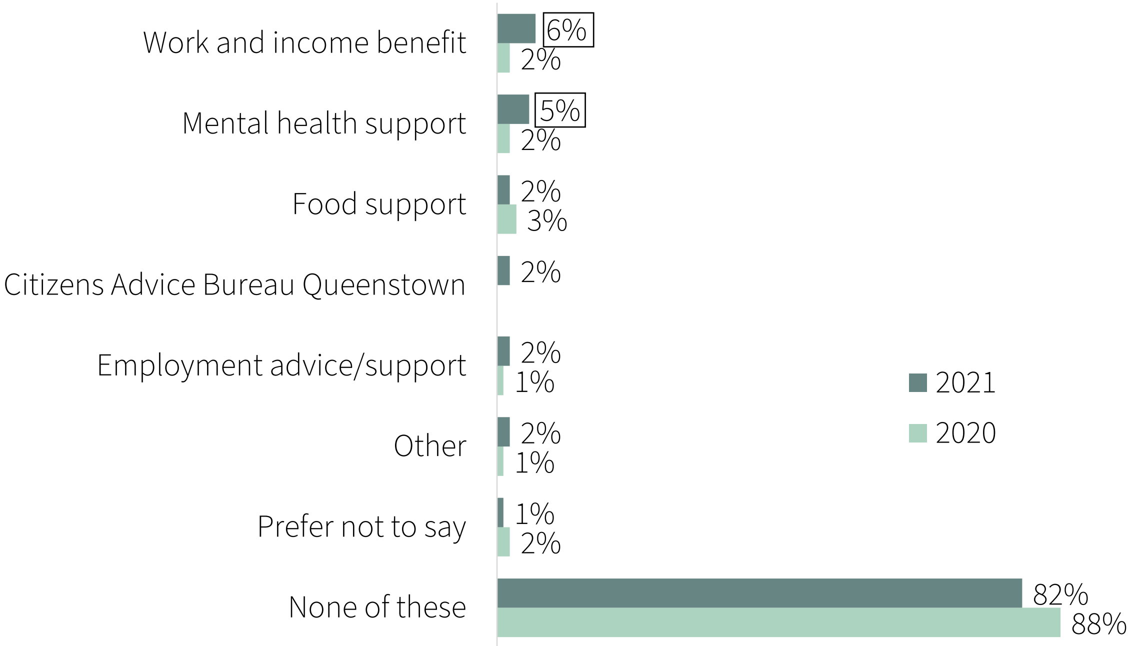
Governance and quality of life

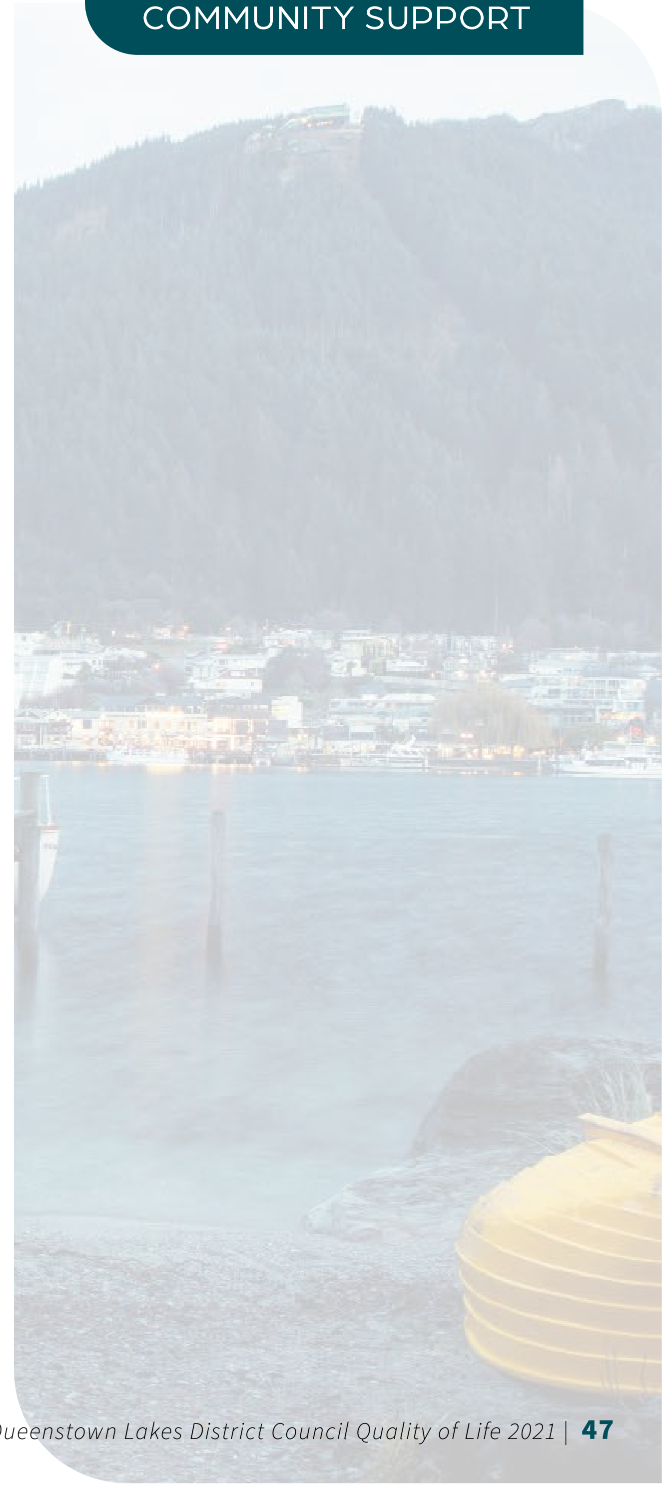
- Rate their quality of life as extremely good

SERVICES ACCESSED

The majority of respondents indicated that they did not access any community support services (82% c.f. 2020, 88%). Of those who did, 6% accessed work and income benefits (c.f. 2020, 2%), while a further 5% accessed mental health support (c.f. 2020, 2%).

ACCESS TO COMMUNITY SUPPORT

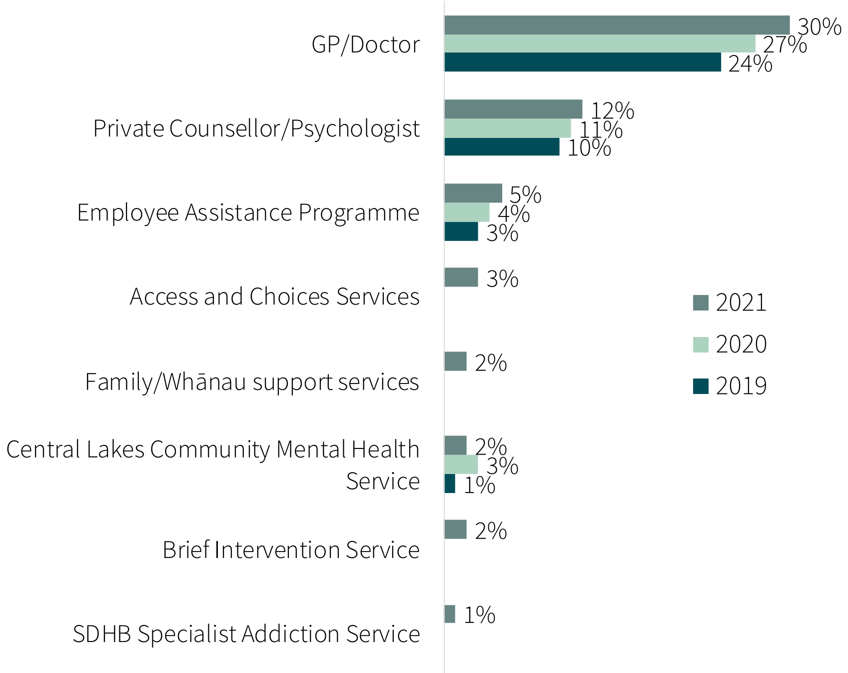




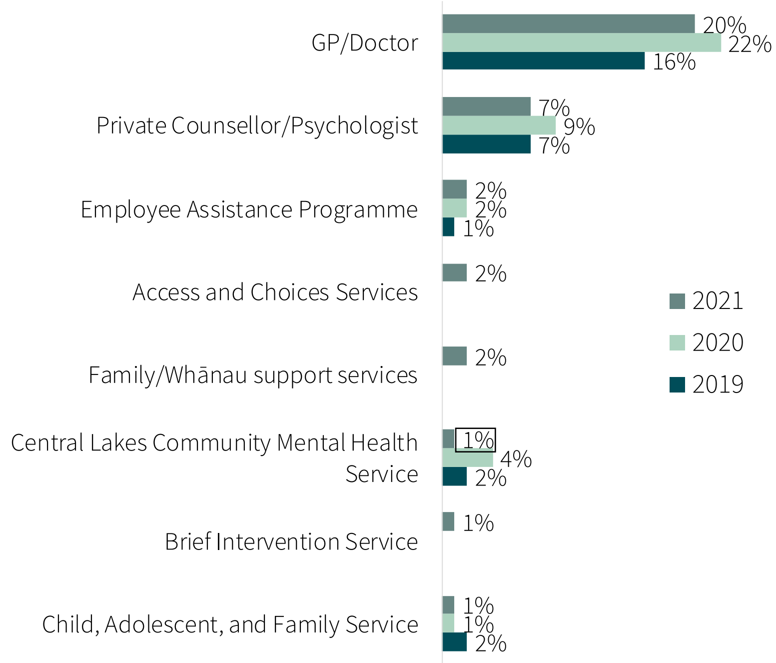
SERVICES ACCESSED

When asked about personal access to mental health services, 30% of respondents said they had seen a doctor (c.f. 2020, 27%), followed by 12% of respondents who accessed a private counsellor or psychologist (c.f. 2020, 11%).
One fifth of respondents said that someone in their household accessed a doctor (c.f. 2020, 22%), followed by 7% who indicated that someone in their household accessed a private counsellor or psychologist (c.f. 2020, 9%).

ACCESS TO MENTAL HEALTH SERVICES: PERSONAL



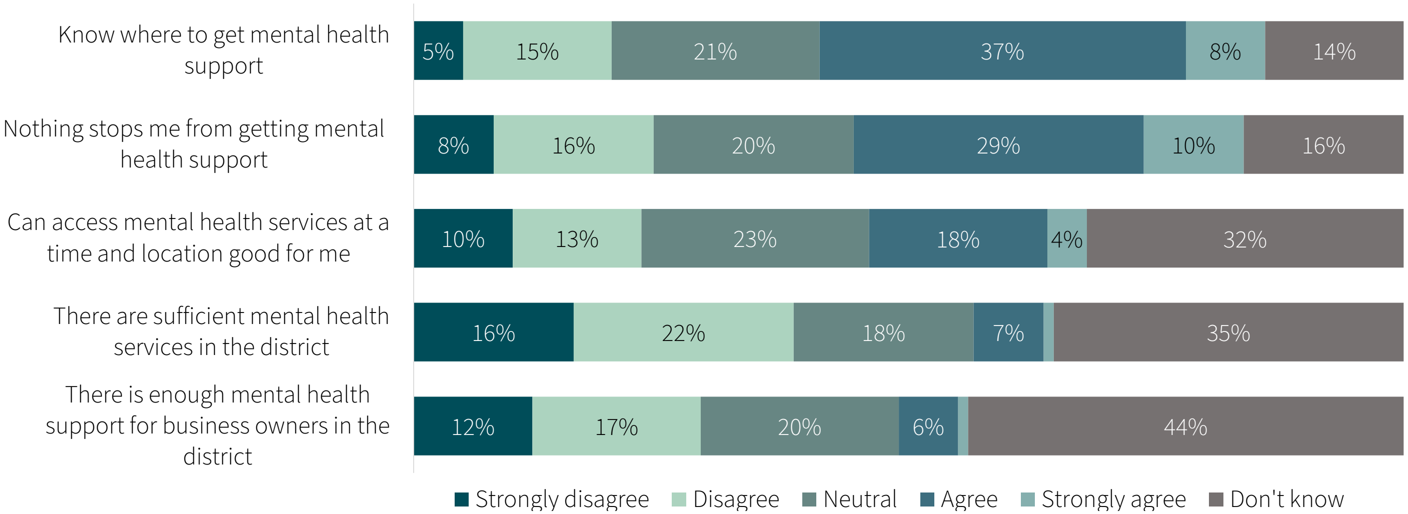
ACCESS TO MENTAL HEALTH SERVICES: HOUSEHOLD



BARRIERS AND ACCESSIBILITY

Respondents were asked to rate their agreement with a series of statements relating to the accessibility of mental health support. Across all measures, agreement ratings were relatively low, with the highest proportion of respondents agreeing (37%) or strongly agreeing (8%) that they knew where to get mental health support. This was followed by 39% of respondents who agreed (29%) or strongly agreed (10%) that nothing stopped them from getting mental health support. Concurrently, respondents agreed least that there was enough mental health support in the district for business owners (7%). It should be noted, that lower agreement ratings were not necessarily symptomatic of high disagreement ratings, but rather high 'don't know' ratings.

ACCESSING MENTAL HEALTH SERVICES



INSIGHTS

This year, respondents were asked to rate their mental wellbeing, of which just over half rated it as good or very good. Despite this being positive in that the majority of respondents felt they were in a good mental state, this still left a high proportion of respondents who felt their mental wellbeing was poor or average.

Respondents observed the effect of COVID-19 on mental wellbeing, highlighting that its existence has either sparked, or exacerbated existing mental health challenges for some residents.

“COVID-19 uncertainty is not helping.”

Ultimately, COVID-19 has caused financial and emotional/relationship strains on some individuals causing anxiety around the future and a sense of isolation.

“One of the most common reasons for depression and anxiety among my friends during COVID-19 was work related issues.”

“Having a baby was a big shift for me. It’s very isolating and was hard with COVID-19 and not having family here.”

Increased access to mental health support through the form of doctors, psychologist/counsellors, and employee assistance programmes etc. was a positive indication of people taking proactive steps to protect and improve their mental state. However, the overwhelming indication from respondents was that current mental health services were inadequate in both quality and quantity to properly serve the growing need in the district.

“Mental professionals need to be easily accessible, not waiting long periods for appointments.”

“The problem is not just with the availability of mental health services, it is also the quality of the services you receive. I have been to see multiple counsellors and have yet to find one that has been able to help me.”

The cost of mental health services was highlighted as a barrier to accessing mental health services in the past year. Primarily, respondents noted that urgent access to such services was only available privately, and this was too costly for most. More prominent this year was the notion that even if people were able to fund private services, these were not readily available in the district. Thus, illustrating the growing dependence on services in this space.

“There is no one available… we have been waiting for over a year. I’m prepared to go private but there is no one available.”

“There are long waitlists in the area, even privately. Five plus months, and I am in a position to be able to do this. Others are not so lucky and will have longer waitlists.”

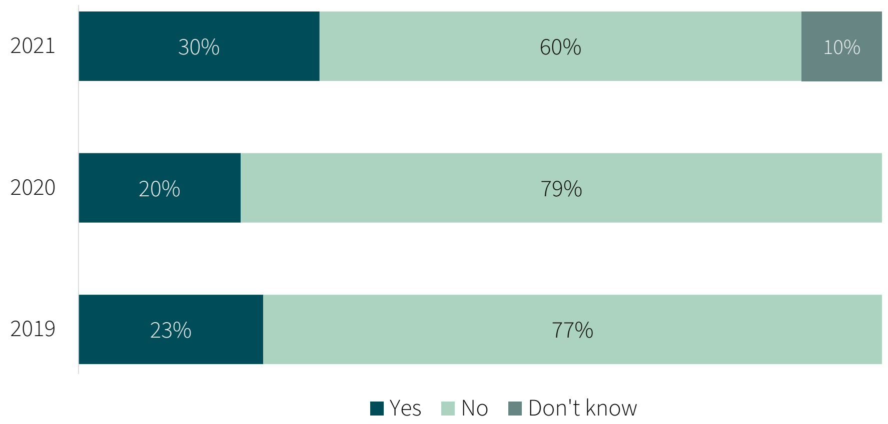
BELONGING

This section looks at measures such as culture, neighbourhood, and pride in the district, all of which contribute to a having a sense of belonging.

CULTURE

This year saw a 10% increase in the proportion of respondents who identified with a culture (30%). Sixty percent of respondents said they did not identify with a specific culture (c.f. 2020, 79%), while a further 10% were unsure.
It should be noted that this was measured slightly differently this year and as such may have had an impact on the changes seen.

IDENTIFIES WITH A CULTURE*



In previous years, results have suggested that the concept of culture can often be complicated to pinpoint with different people interpreting culture differently (i.e. ethnic, religious, or ideological significance). Notably, respondents who identified as Māori or an ethnic minority were more likely to say they identified with a specific culture, of which both identities are often synonymously tied to strong 'cultural' practices.

**Please note, this has been measured differently in previous years.*

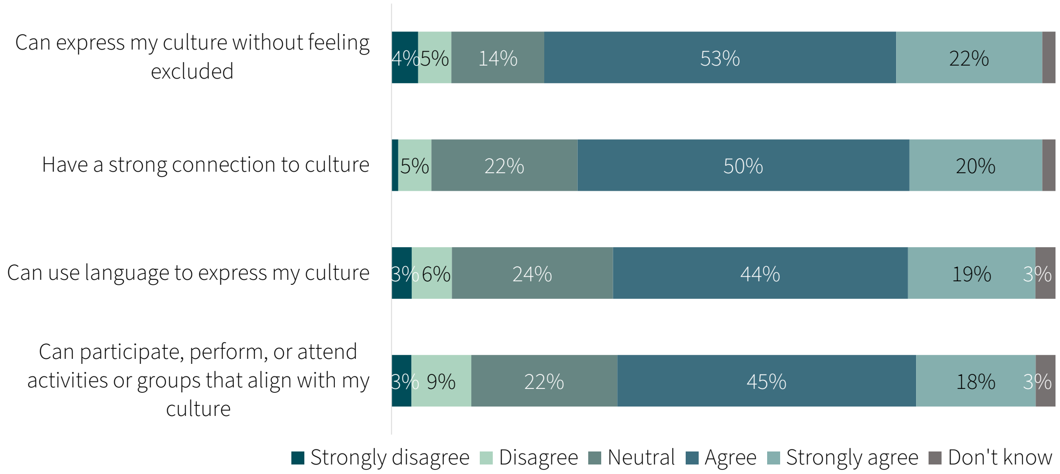
CULTURE

Respondents who identified with a specific culture (30%), were asked to rate their agreement with a series of statements relating to their ability to express their culture.

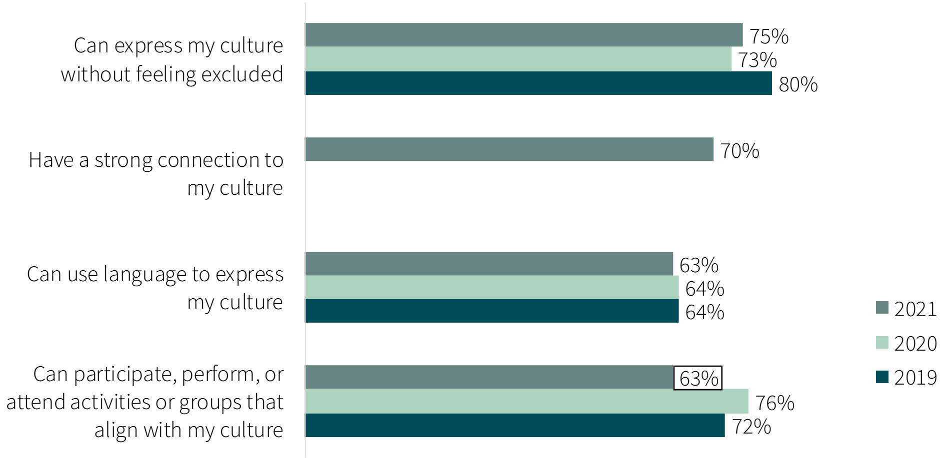
Overall agreement was highest for a respondent's ability to express their culture without feeling excluded (75% c.f. 2020, 73%), followed by a close connection to their culture (70%).

It should be noted that there was a decrease of 13% in the proportion of respondents who agreed or strongly agreed that they could participate, perform, or attend activities or groups that aligned with their culture (63% c.f. 2020, 76%).

EXPRESSION OF CULTURE



ANNUAL TRENDS: TOTAL AGREE



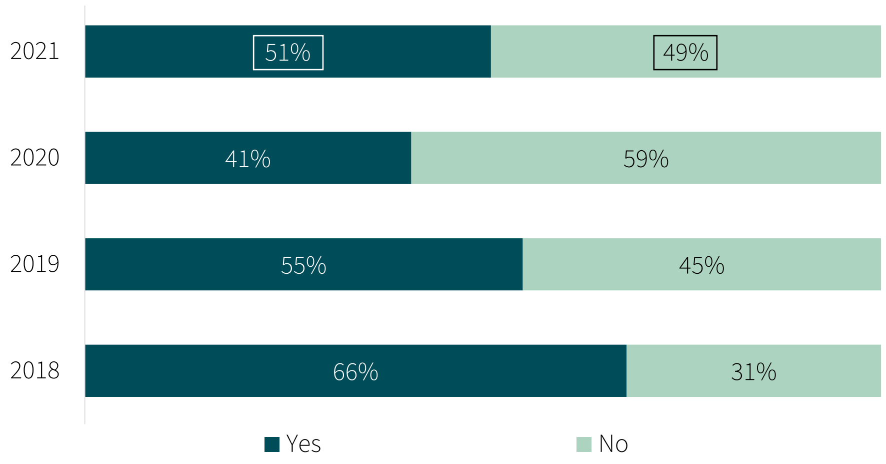
(Base size n=315)

EVENTS AND OFFERINGS

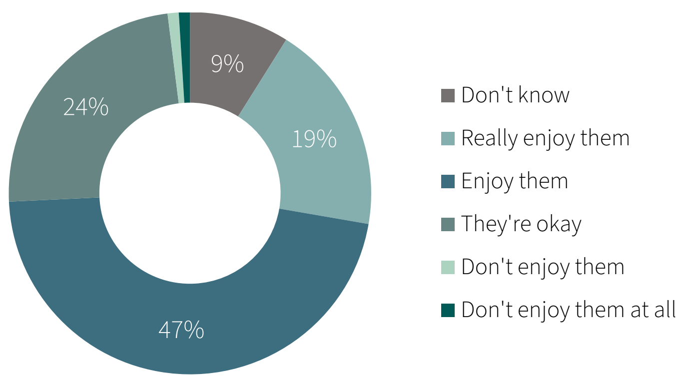
After participation rates dropped in 2020 (41%), 51% of respondents indicated that they had participated in cultural events within the district in the past 12 months.

This year, respondents were asked to rate how much they enjoyed events that were held in the district. Positively, the majority of respondents (66%) said they enjoyed (47%) or really enjoyed (19%) these events. Twenty four percent of respondents said the events were okay, while just 2% of respondents did not enjoy them (1%) or did not enjoy them at all (1%).

PARTICIPATION IN CULTURAL EVENTS



ENJOYMENT OF DISTRICT'S EVENTS

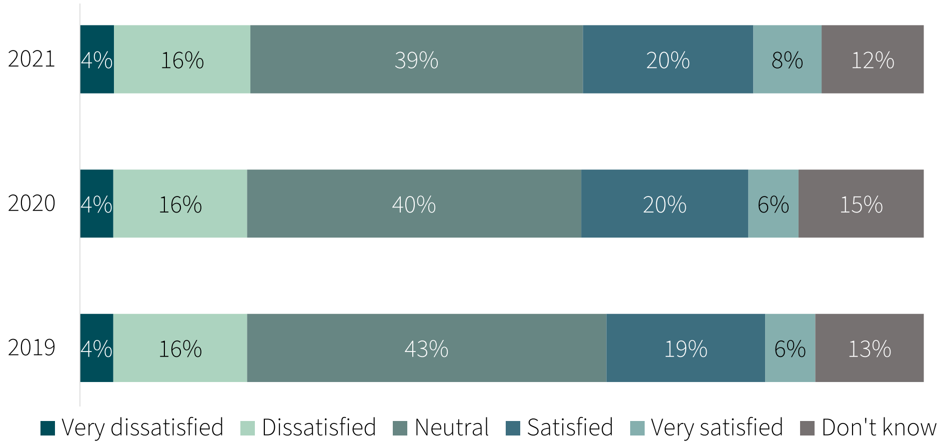


EVENTS AND OFFERINGS

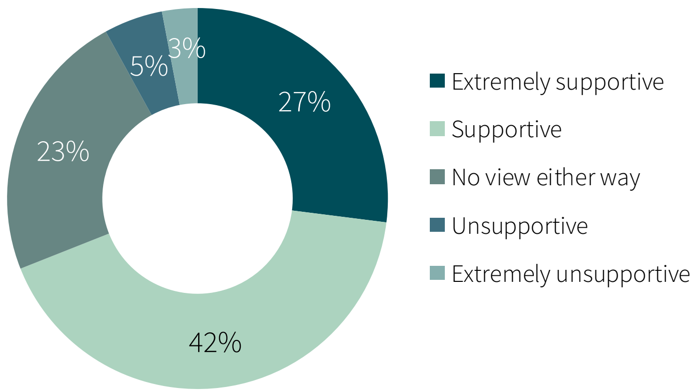
Similar to 2020, 28% of respondents indicated that they were satisfied (20%) or very satisfied (8%) with the celebration of tangata whenua in the district, while a further 39% were neither satisfied nor dissatisfied with this measure.

This year respondents were asked how supportive they would be of an increase in art in public spaces. Over two thirds (69%) of respondents were supportive (42%) or extremely supportive (27%) of this. On the other hand, 8% of respondents were unsupportive (5%) or extremely unsupportive (3%) of this.

SATISFACTION WITH CELEBRATION OF TANGATA WHENUA



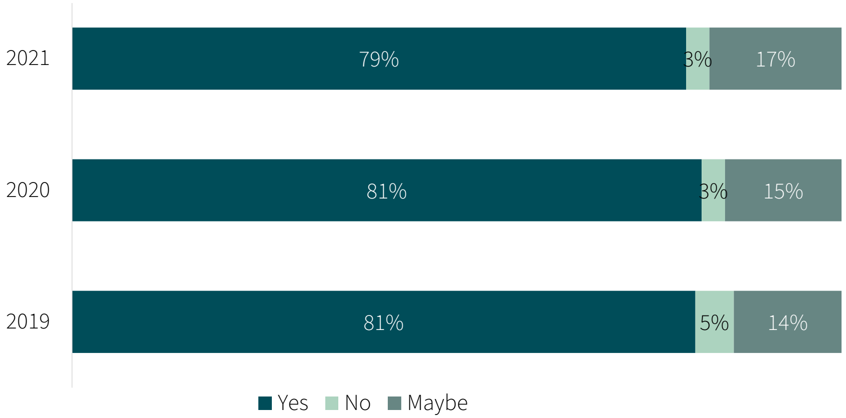
INCREASE OF ART IN PUBLIC SPACES

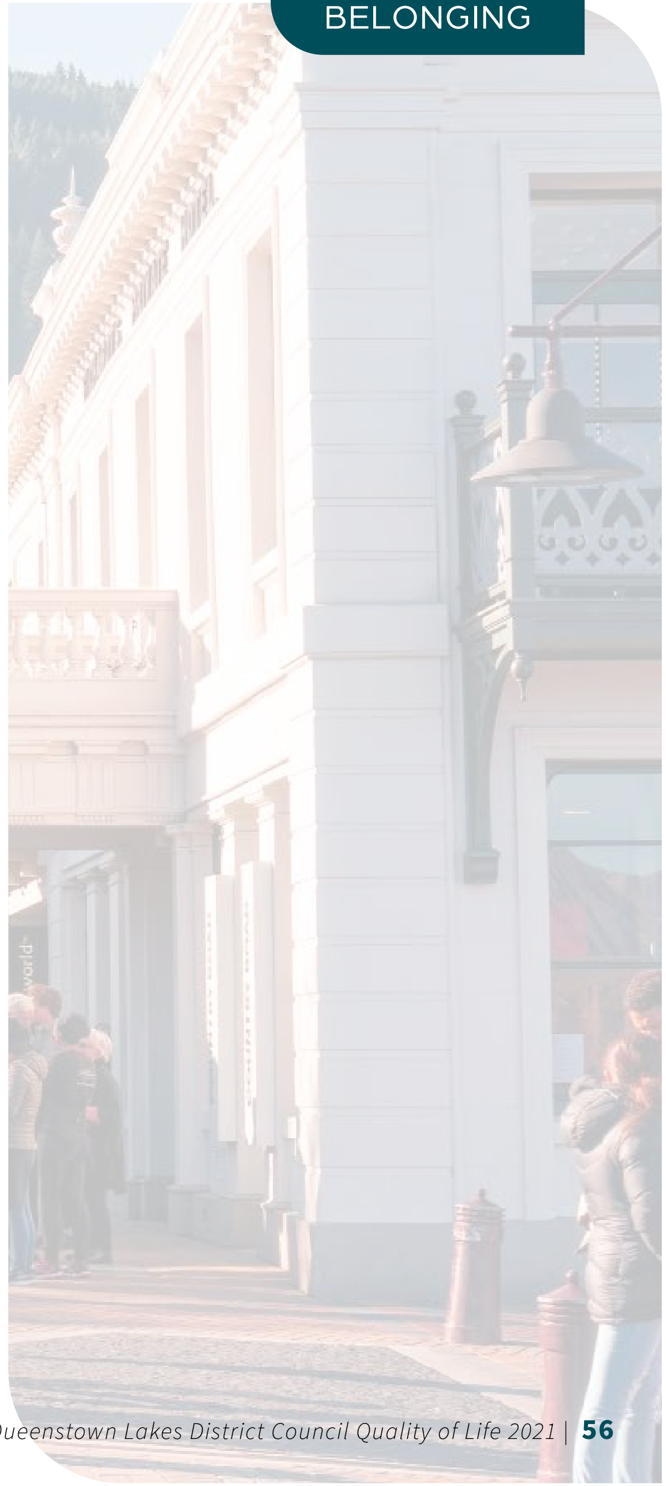


INTENTION TO STAY

When compared to 2020 (81%), slightly fewer respondents indicated that they were intending on staying in the district (79%). This has prompted a slight increase in the proportion of respondents who were unsure whether they would stay (17% c.f. 2020, 15%), while 3% of respondents said they were not intending to remain in the district (c.f. 2020, 3%).

INTENDING TO STAY





INTENTION TO STAY

Previous years' findings have shown trends amongst those respondents who do not intend to stay in the district or who are unsure if they will stay. These findings have illustrated that respondents intending to leave are often disadvantaged in a number of financial, professional, and emotional ways. This year's findings reiterate this notion, and the following analysis shows the distinct difference between those who intend to leave/might leave the district, and those who intend to stay.

Intend on leaving/might leave

These respondents were more likely to:

Demographics, home, and employment

- Be aged 39 years and younger
- Be earning an income of less than $60,000
- Be living with non-relatives
- Rent their home/space
- Unable to heat their home
- Work in the public administration and safety (including local government) industry
- Disagree that there is a long term career path for them in the district
- Disagree that they have mental, emotional, and wellbeing support at work

Health and belonging

- Cite cost as a barrier to accessing medical professionals
- Rate their mental wellbeing as poor
- Have lower engagement levels with their neighbourhood
- Identify higher house prices and rent as a negative impact of tourism
- Rate their overall quality of life as poor, extremely poor, or average

Intend on staying

These respondents were more likely to:

Demographics, home, and employment

- Be aged 40-54 years, or 65 years and older
- Be earning an income of more than $200,000
- Be living with their partner/spouse and/or children
- Own their home
- Able to heat their home
- Be retired
- Find their current work fulfilling
- Be willing to change their industry of work to secure a job in the district

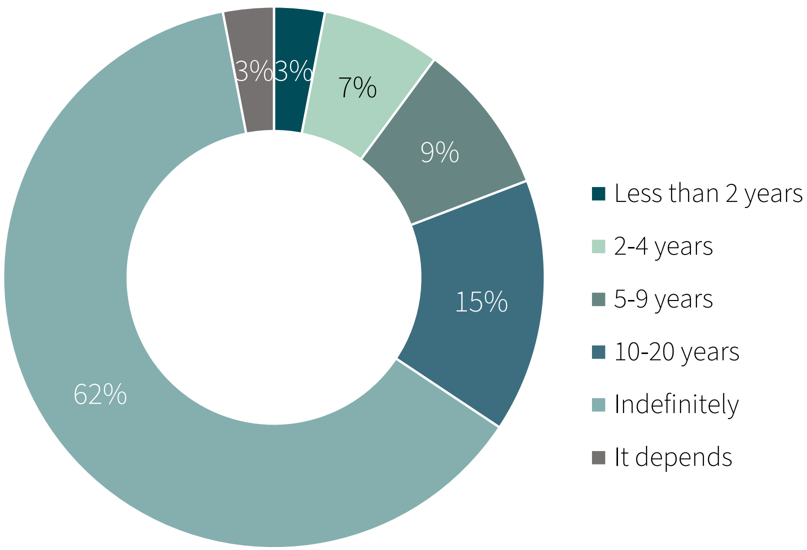
Health and belonging

- Say nothing stops them from accessing a medical professional
- Rate their mental wellbeing as good
- Feel as though they can participate, perform, or attend activities or groups that align with their culture
- Have higher engagement levels with their neighbourhood
- Have a sense of pride in the district
- Rate their overall quality of life as good or extremely good

INTENTION TO STAY

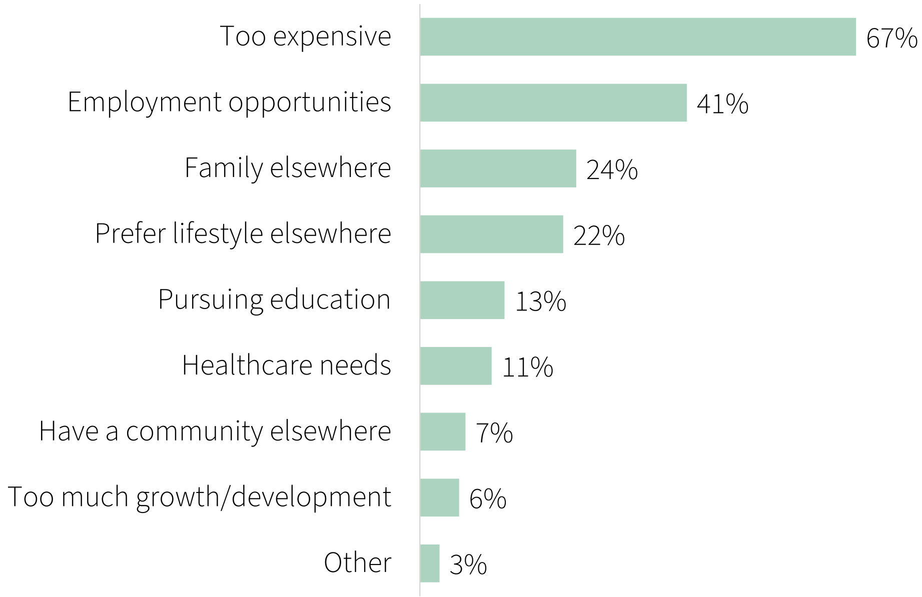
Respondents who intended to stay in the district (79%) were asked how long they intended on staying. The majority (62%) of respondents said they would remain in the district indefinitely.
Concurrently, the expense of living in the district (67%), employment opportunities (41%), and family ties elsewhere (24%) were the key reasons that respondents intended to leave the district, or were unsure whether they would stay or not.

LENGTH OF INTENDED STAY



(Base size n=818)

REASONS FOR INTENTION TO LEAVE

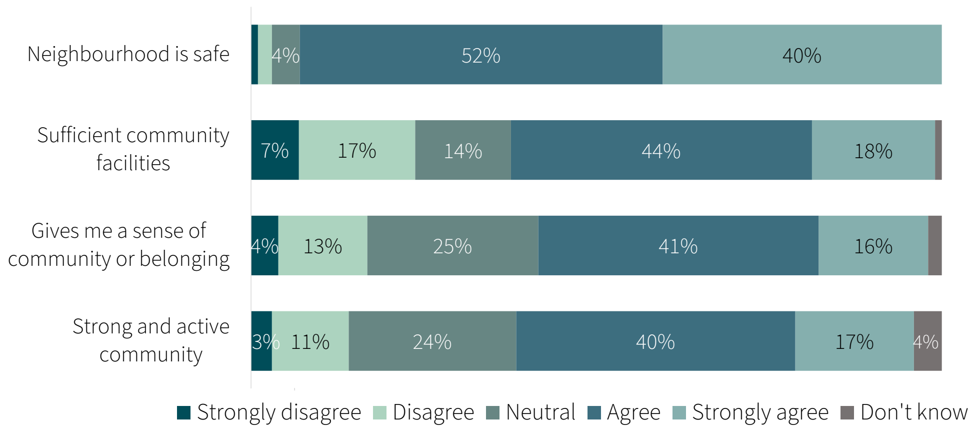


(Base size n=182)

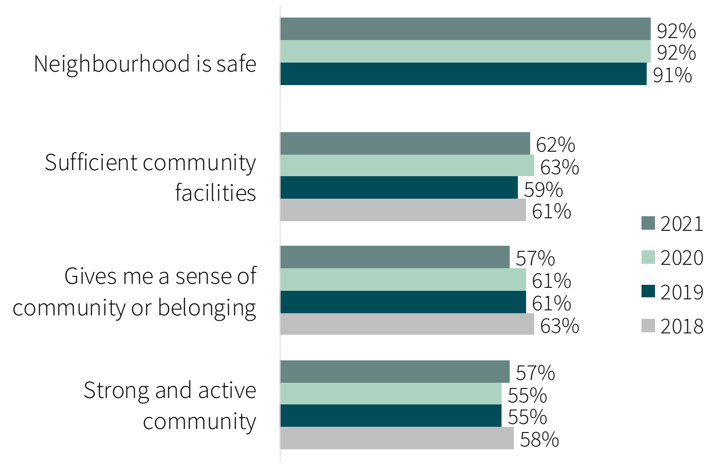
NEIGHBOURHOOD

Consistent with last year, the highest proportion of respondents agreed that their neighbourhood was safe (92%), and that there were sufficient community facilities in their neighbourhood (62% c.f. 2020, 63%).
Overall agreement ratings were lower for a strong and active community (57% c.f. 2020, 55%) and providing a sense of belonging (57% c.f. 2020, 61%).

NEIGHBOURHOOD CHARACTERISTICS: WELLBEING



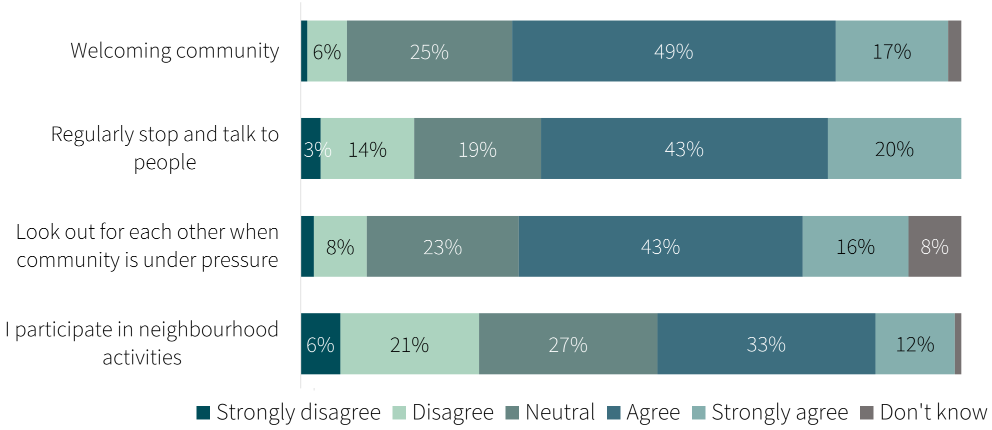
ANNUAL TRENDS: TOTAL AGREE



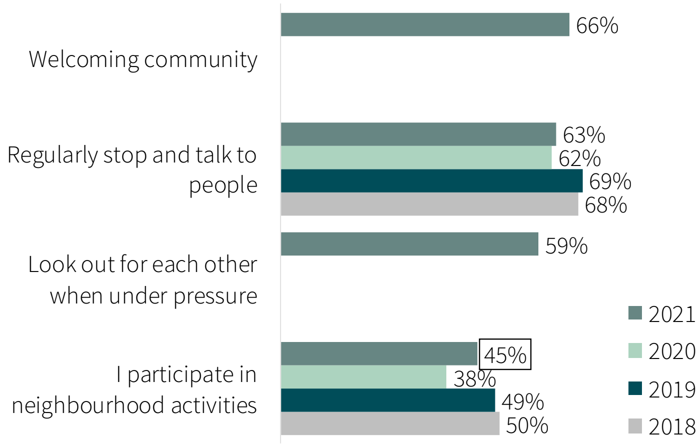
NEIGHBOURHOOD

Two thirds of respondents agreed that their neighbourhood offers a welcoming community, followed by 63% of respondents who agreed that they regularly stop and talk to people (c.f. 2020, 62%). Fifty nine percent of respondents agreed that the people in their neighbourhood looked out for each other when under pressure, while 45% of respondents agreed that they participated in neighbourhood activities (38%).

NEIGHBOURHOOD CHARACTERISTICS: INTERACTIVE



ANNUAL TRENDS: TOTAL AGREE



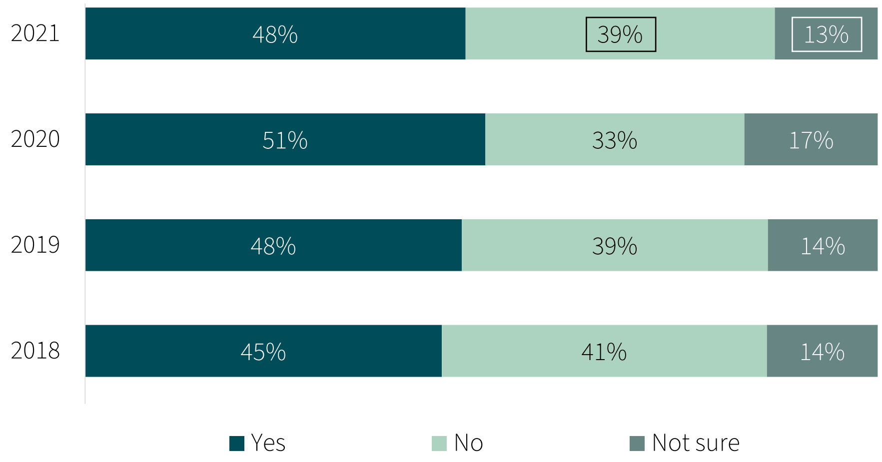
PREPAREDNESS

Forty eight percent of respondents stated they would be prepared for an emergency (c.f. 2020, 51%), while 39% indicated they would not be prepared (c.f. 2020, 33%). A further 13% of respondents said they were unsure whether they would be prepared (c.f. 2020, 17%).
Concurrently, 15% of respondents reported that their neighbourhood would be prepared for an emergency (c.f. 2020, 17%), followed by 28% who indicated that their neighbourhood would not be (c.f. 2020, 23%). A further 57% of respondents noted that they were unsure if their neighbourhood would be prepared (c.f. 2020, 61%).

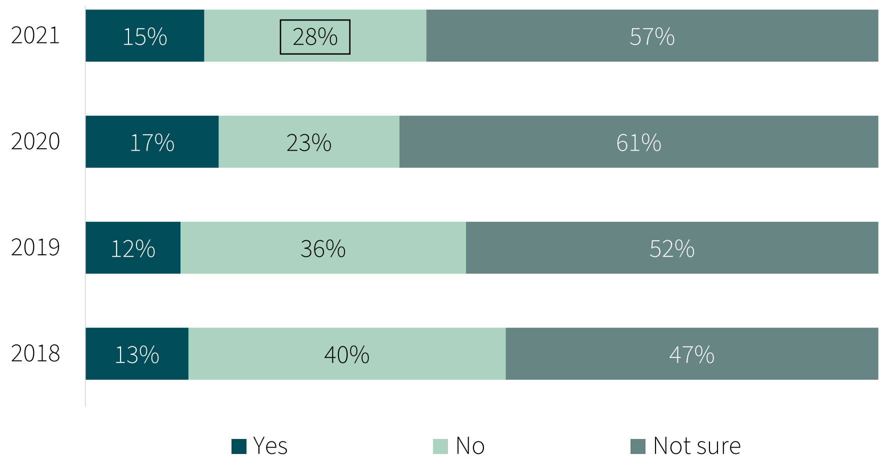
Previous years have illustrated that those who are personally unprepared for an emergency are disconnected and or/less engaged with their community. This year's findings further validate this. Specifically, respondents who were personally unprepared for an emergency were more likely to:

- Be aged 39 years or younger
- Be on an essential skills visa
- Rent their home/space
- Have no disposable income
- Be in full time paid work
- Show signs of minimal engagement with their neighbourhood
- Have an average quality of life

EMERGENCY PREPAREDNESS: YOURSELF



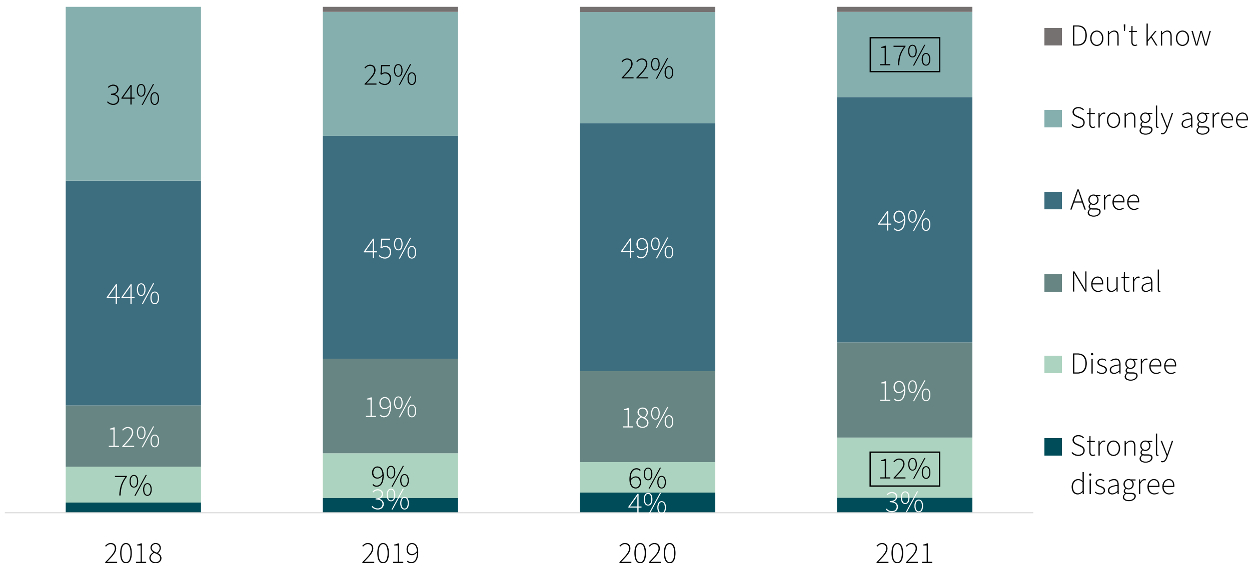
EMERGENCY PREPAREDNESS: NEIGHBOURHOOD

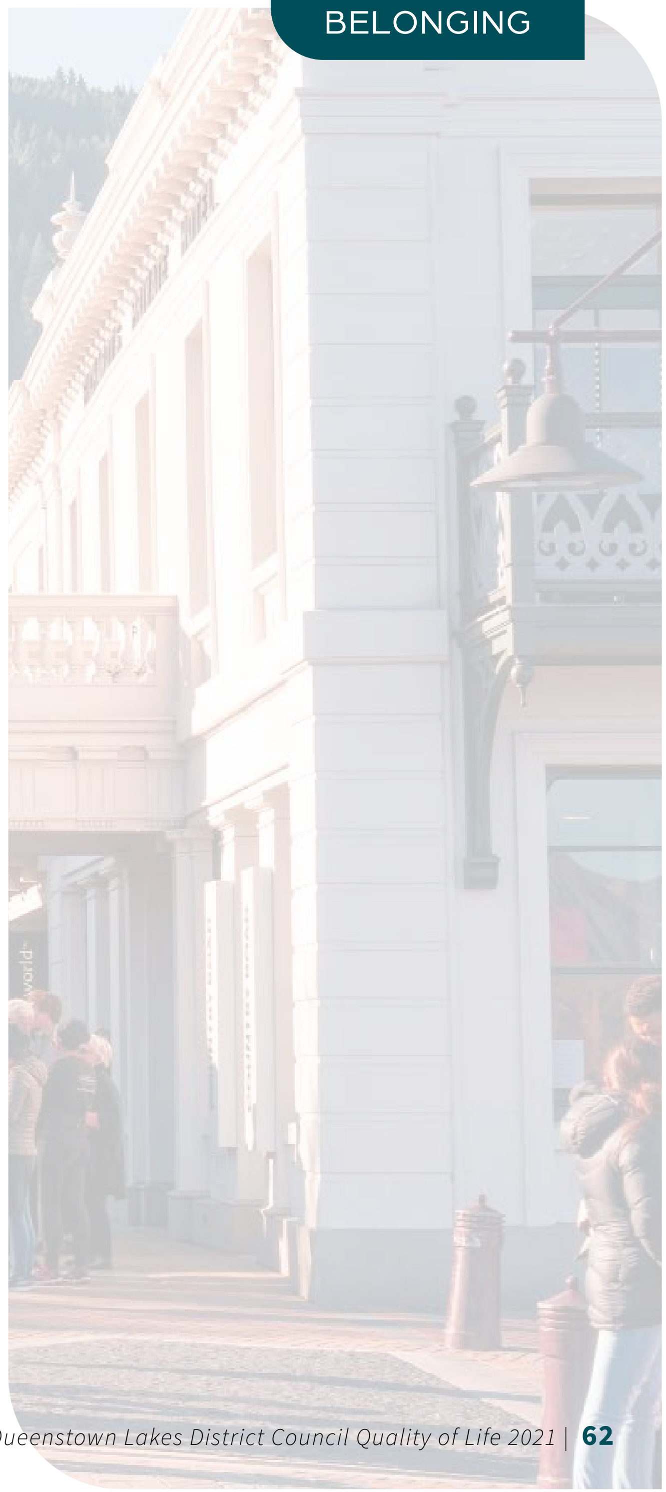


PRIDE

This year saw a decrease in the proportion of respondents who agreed (49%) or strongly agreed (17%) that they felt a sense of pride in the district (66% c.f. 2020, 71%). This was offset by an increase in the proportion of respondents who disagreed (12%) or strongly disagreed (3%) that they felt a sense of pride in the district (15% c.f. 2020, 10%).

FEEL A SENSE OF PRIDE IN THE DISTRICT





INSIGHTS

Queenstown is a melting pot for a wide array of cultures, and the arts and culture scene is something of note that respondents celebrate about the district.

"Overall, this region produces extraordinary depth, range, and quality of arts and culture for a community of this size."

However, this appreciation was often coupled with a desire to better facilitate arts and cultural activities.

"Greater investment needs to be made into our arts, cultural, and heritage space."

In 2020, there was heightened attention towards the integration of the Māori culture and language in the district, with comments both supporting and opposing this. This year, the support of improved integration of the Māori culture far outweighed any opposition.

"More Māori celebration, culture, and te reo exposure."

As highlighted in 2020, clear prejudices towards such integration did exist, however, this was a minority.

As it pertained to neighbourhood measures, it is interesting to note that community connectedness was relatively low (i.e. fewer respondents felt as though they belonged). When compared to other parts of the country, Queenstown Lakes District is home to a more transient population, and in previous years, this has been a real issue for some residents. This year, such concerns re-emerged as a key theme.

"There is little or no sense of community as I am one of the few owners. Everyone else is transient."

Ultimately, this sense of transience means people are not around long enough to connect with others in their neighbourhood. One other factor contributing towards, and exacerbating this issue is the use of AirBnB style accommodation.

"My street is mainly AirBnB rentals, so no real neighbours."

This absence of neighbourly connectedness due to transience affects the degree to which residents felt a sense of belonging.

"We lost so many neighbours due to AirBnB. It is wrong and not fair for quality of life."

Indeed, these issues were heightened in some areas more than others. Notably, respondents residing in Arrowtown often commented on their high sense of community.

"Arrowtown is a beautiful place to live. It has the right balance of nature and community spirit to bring up a young family."

Indeed, there was a slight increase in the proportion of respondents who reported that the will or might leave the district. While an array of factors were at play, several financial elements (e.g. lower income, inability to heat their home, and renting as opposed to owning) indicate that financial hardship is a key determinant for intentions to move.

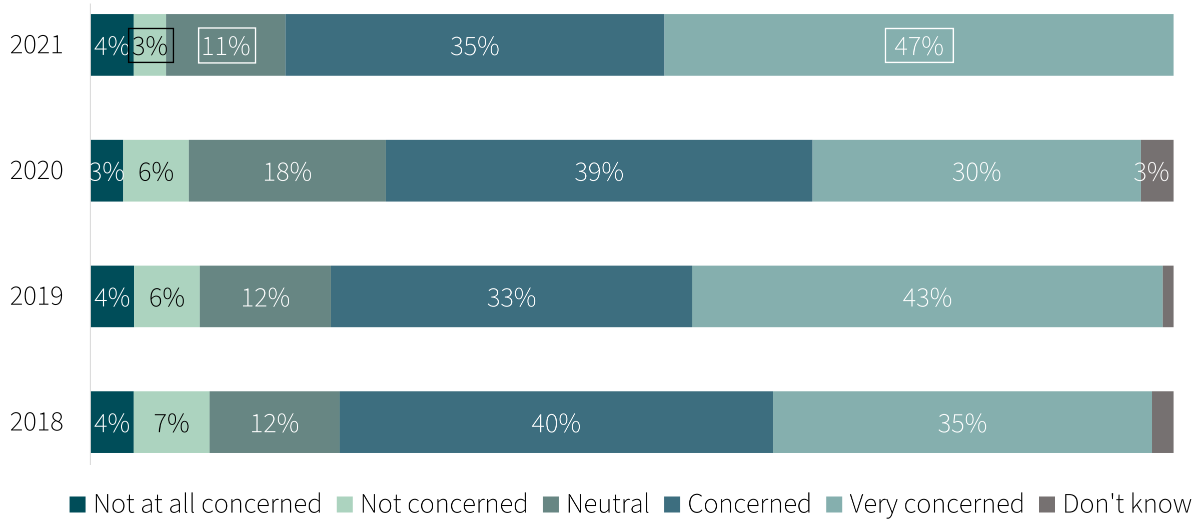
ENVIRONMENT

In this section, environmental measures such as respondents' waste habits, degree of concern with climate change, and QLDC's environmental actions are discussed.

CLIMATE CHANGE

After a decrease in overall concern was seen in 2020 (69%), this year saw an increase in the number of respondents who said they were concerned (35%) or very concerned (47%) with the impact of climate change. This increase was largely driven by a decrease in neutral ratings (11% c.f. 2020, 18%).

CONCERN WITH THE IMPACT OF CLIMATE CHANGE

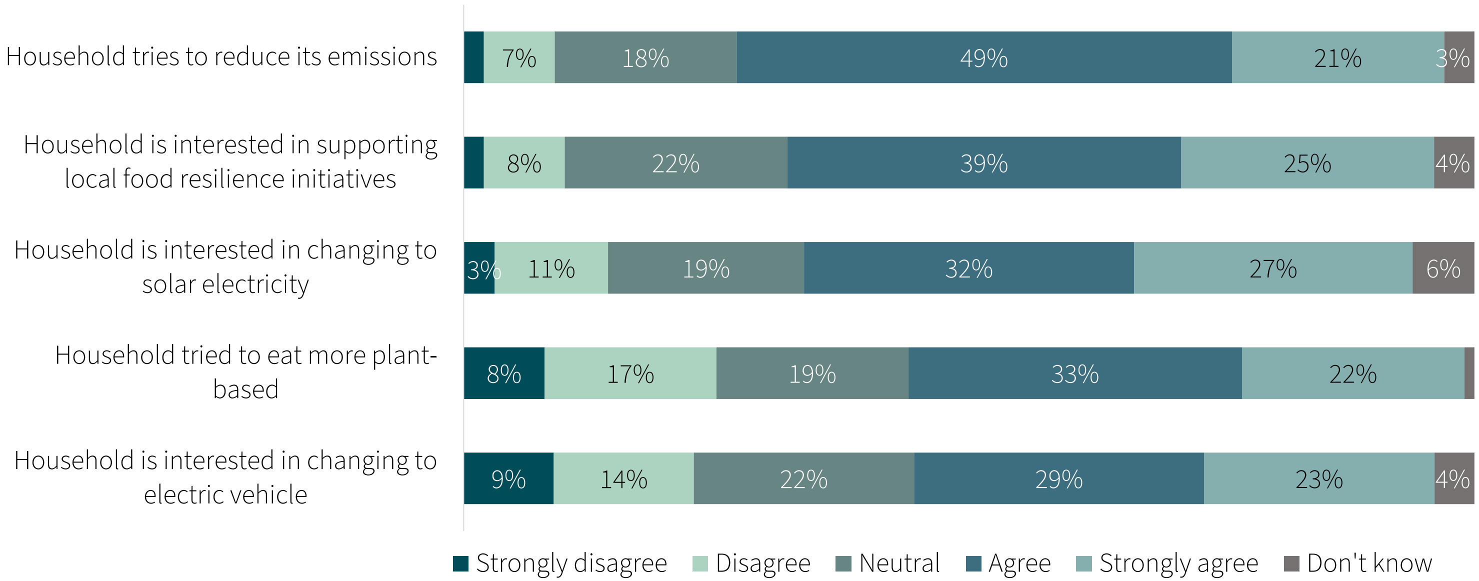


Results suggest there was a generational link to matters relating to climate change; those aged 65 years and older were more likely to have no concern with the impact of climate change, while those aged 39 years and younger were more likely to be very concerned.

ACTIONS

This year respondents were asked whether their household had implemented any actions to reduce their impact on the environment by indicating how much they agreed or disagreed with a variety of statements. Findings showed that the highest proportion of respondents stated their household tried to reduce its emissions (70% total agree), followed by 64% (total agree) of respondents who indicated an interest in supporting local food resilience initiatives. Concurrently, fewer respondents agreed (29%) or strongly agreed (23%) that their household was interested in changing to an electric vehicle.

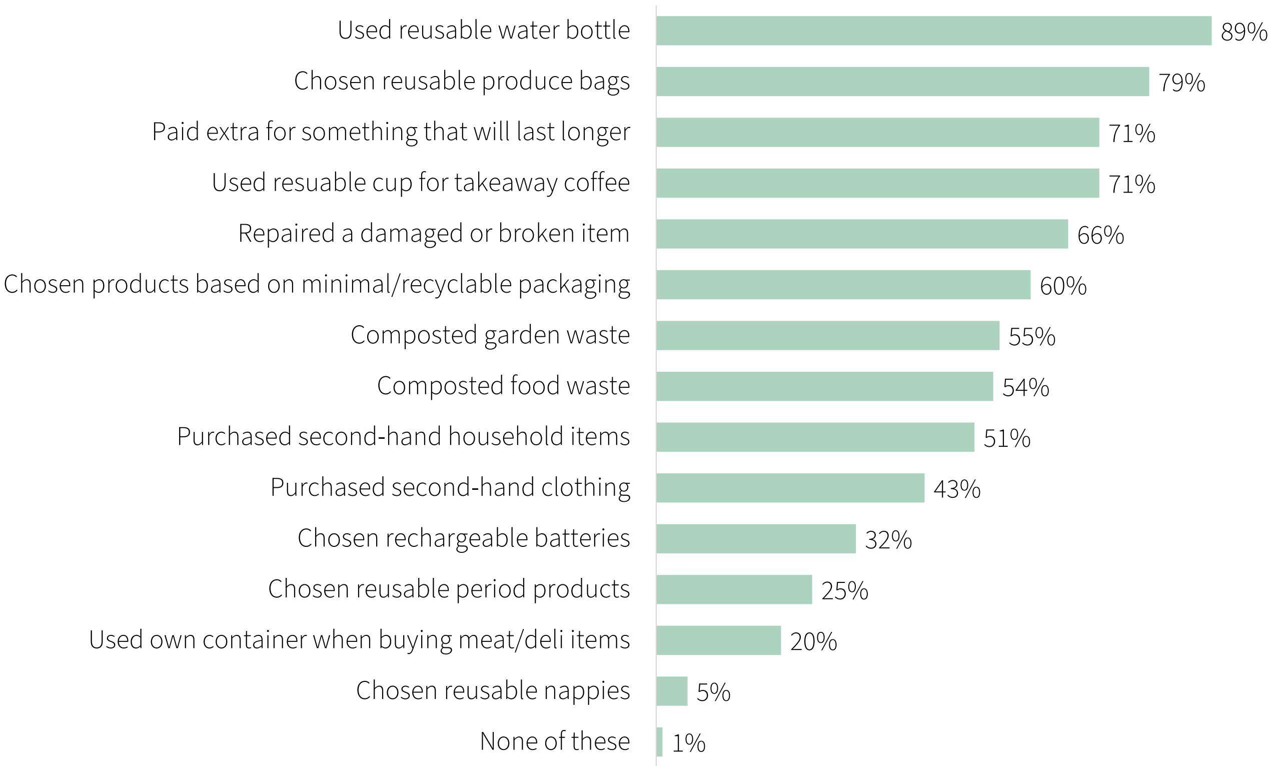
HOUSEHOLD ENVIRONMENTAL EFFORTS



ACTIONS

Respondents were asked whether they had implemented any efforts to reduce their waste. The highest proportion of respondents attempted to reduce their waste through the use of a reusable water bottle (89%), followed by 79% of respondents who opted for reusable produce bags. Seventy one percent (each) of respondents had paid extra for something that will last longer and/or used a reusable cup for takeaways. At lower levels, respondents chose reusable nappies (5%), and used their own container when purchasing meat/deli items (20%). It should be noted that just 1% of respondents said they had not attempted any of these measures in order to reduce their waste output.

WASTE REDUCTION EFFORTS



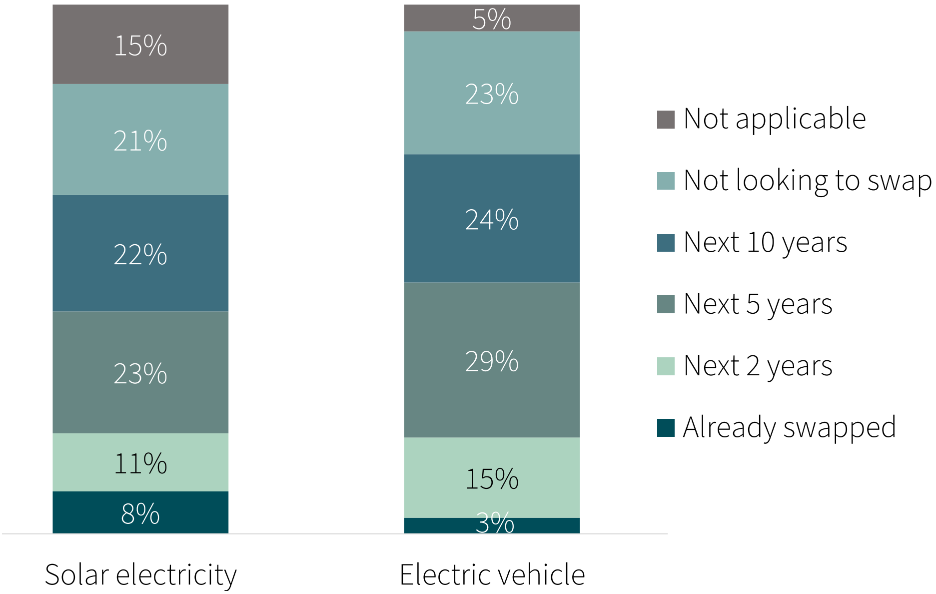
Respondents who have implemented a variety of waste reduction actions were more likely to be:

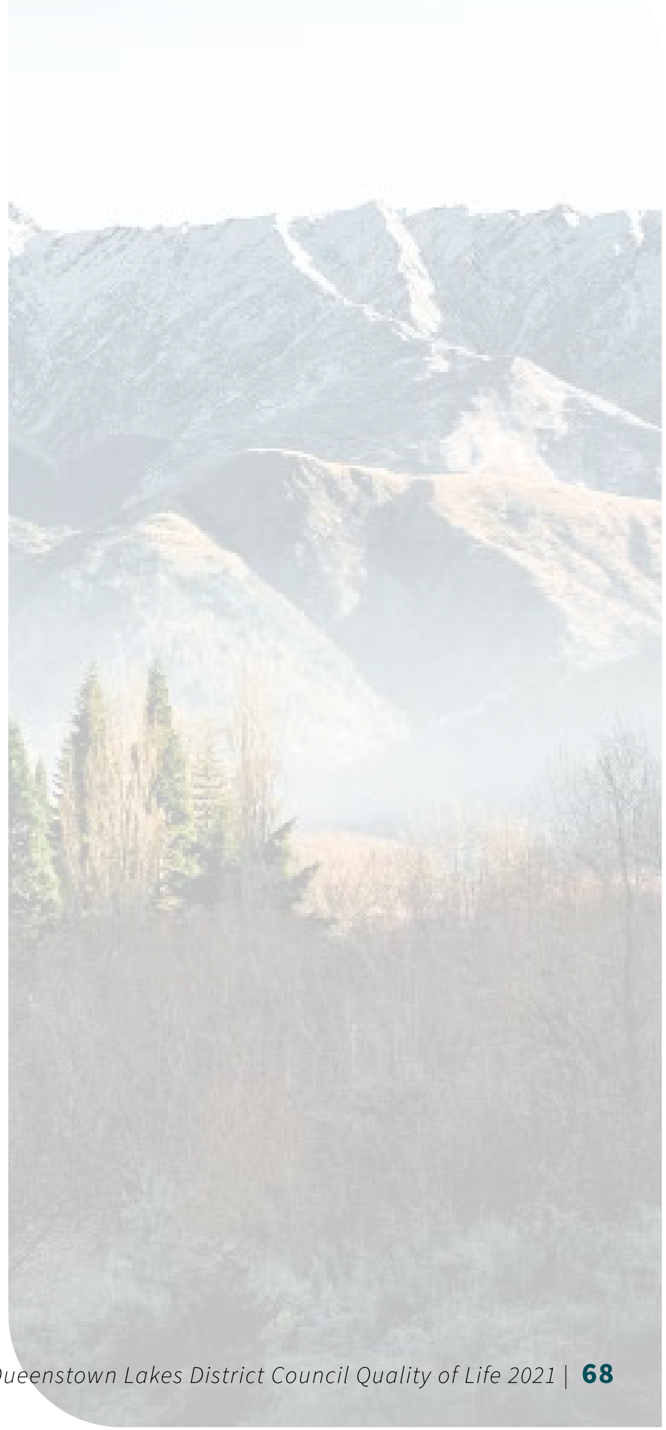
- Aged 39 years and younger
- Identify as female
- Have no disposable income
- Use an array of alternative transport methods to a car in their spare time
- Identify a greater effort to improve and restore the environment as a positive impact of tourism
- Identify environmental and biodiversity side-effects as a negative impact of tourism

ACTIONS

Respondents were asked whether they were looking to swap to a solar electricity alternative or an electric vehicle alternative.
Thirty six percent of respondents indicated that they were not looking to swap to solar electricity (21%), or it was not applicable (15%). Of those who were looking to swap, 23% of respondents indicated they were looking to do so in the next five years.
As it pertained to an electric vehicle, 28% of respondents said they were not looking to swap (23%) or it was not applicable (5%). Of those respondents who were looking to swap to an electric vehicle, 29% were looking to do so in the next five years.

SWAPPING TO ELECTRIC ALTERNATIVES

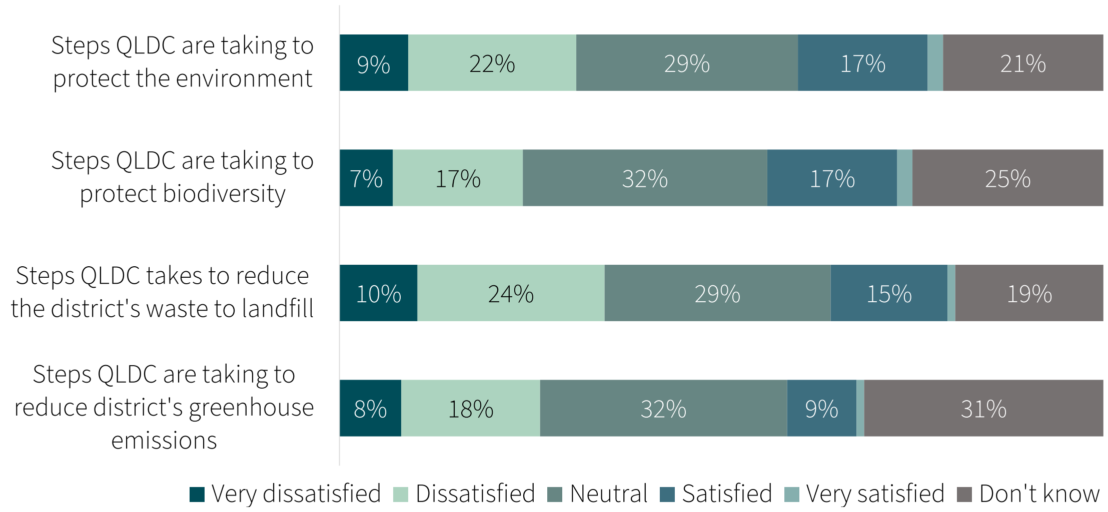


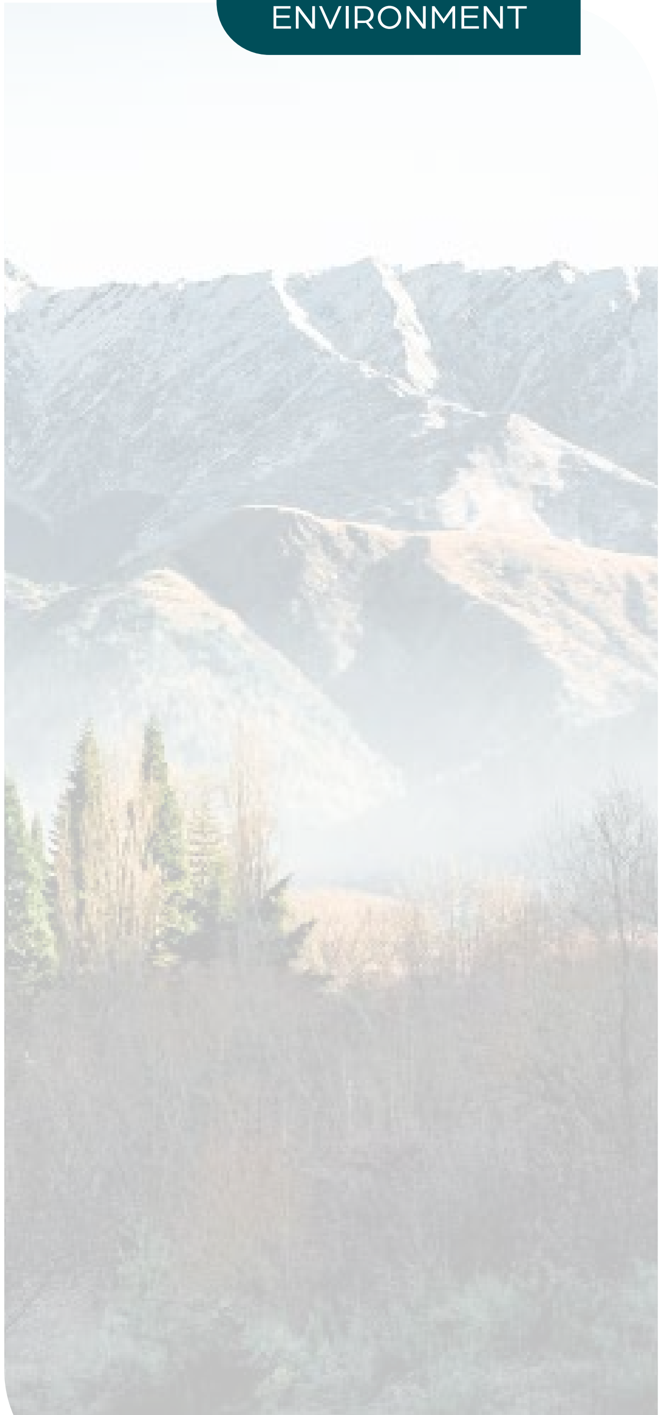


COUNCIL INITIATIVES

Nineteen percent of respondents were either satisfied (17%) or very satisfied (2%) with the steps QLDC took to protect the environment. A further 19% expressed overall satisfaction with the steps QLDC were taking to protect biodiversity.
At a lower level, 16% of respondents expressed overall satisfaction with the steps QLDC took to reduce the district's waste, while 10% said they were satisfied (9%) or very satisfied (1%) with the steps QLDC took to reduce the district's greenhouse emissions.

QLDC MEASURES IN PROTECTING THE ENVIRONMENT





INSIGHTS

A wider array of environmental measures were included in this year's study, offering greater insights not only into the perceptions which respondents held regarding environmental matters, but actions they have taken to be more environmentally conscious.

Consistently high concerns with the impact of climate change has shown that residents in the district are concerned for the welfare of the environment.

"We need to get serious and start putting our environment first."

Whether prompted by the inclusion of new measures, there was a call for QLDC to lead by example and put measures in at a governance level to preserve the environment. Most comments relating to the environment, be it biodiversity, or climate action, referenced the need for Council to take their place in this cause.

"QLDC should apply its governance much more strongly on this front."

It should be noted that some respondents perceived that QLDC was not doing enough in this space, or were even acting as enablers to environmental destruction. Specifically, this was through infrastructural developments, waste habits, or just being absent/ passive participants in preservation.

"Projects are allowed to go ahead with a hugely negative effect on the environment. The lack of action causes stress on those bringing up the next generation… how long will we even be able to swim in the lake for considering the lack of infrastructure around the new housing developments and storm water/waste management?"

On the other hand, there was a call for more transparency from QLDC with these matters. Increased ownership of environmental stewardship and communication around what efforts Council take may settle or even change negative perceptions of QLDC in this space.

"Not specifically aware of what QLDC is doing in this area."

At an individual and household level, the district's residents take a very proactive and conscious approach to minimising their impact on the environment. Thus, their call for the local area authority to do the same comes from an appreciation of their natural surroundings and an earnest desire to protect that at all costs.

"We need to specifically and immediately protect the geography of our natural areas!"

For some respondents, their actions were limited by cost, whereby they want to take added steps in protecting the environment, however, expenses associated with this means they were unable to do so (e.g. purchase something slightly more expensive because the packaging is more eco-friendly).

"I want to make changes but they are currently completely unaffordable."

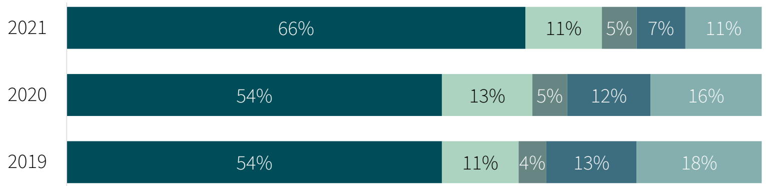
TRANSPORT

Looking at ways residents move around the district, this section looks at respondents' perceptions of public transport methods, how regularly they are using alternative transport methods to cars, and their perceptions of their most visited town centres.

TRANSPORT MODES: WORK*

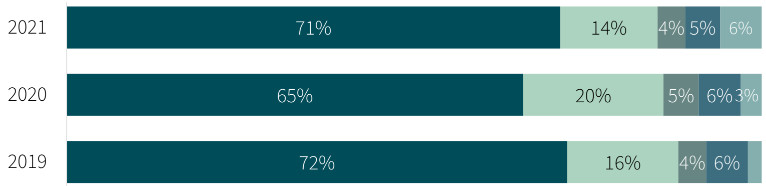
Respondents who commuted to a designated workplace (part or full time) were asked about their alternative modes of transport used to get there. As was seen in 2020, walking continues to be the most used alternative mode to driving, with 34% of respondents indicating they use this method infrequently, monthly, weekly, or daily. Concurrently, 98% of respondents said they never use an e-scooter to commute to their workplace, meaning this was the least used alternative transport method.

WALK

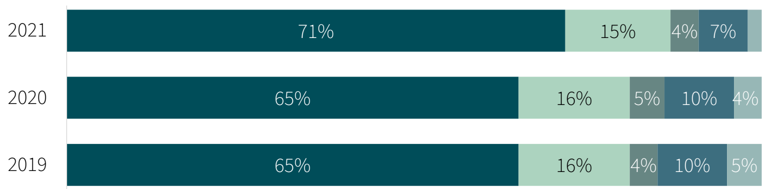


RIDE SHARE

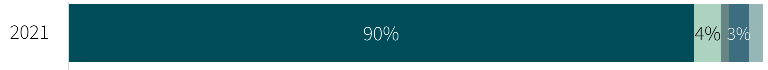
BUS



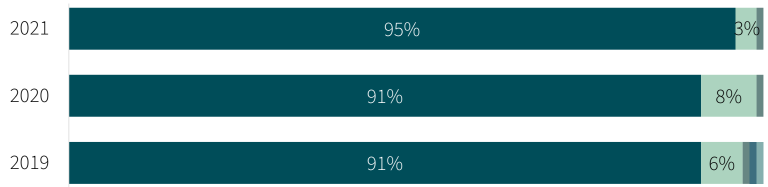
BIKE



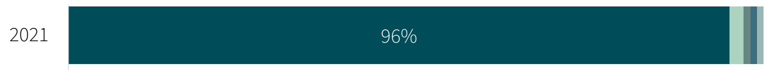
E-BIKE**



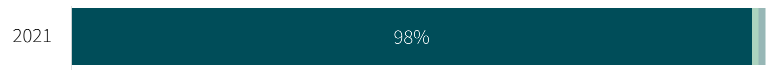
WATER TAXI



ELECTRIC CAR



E-SCOOTER**



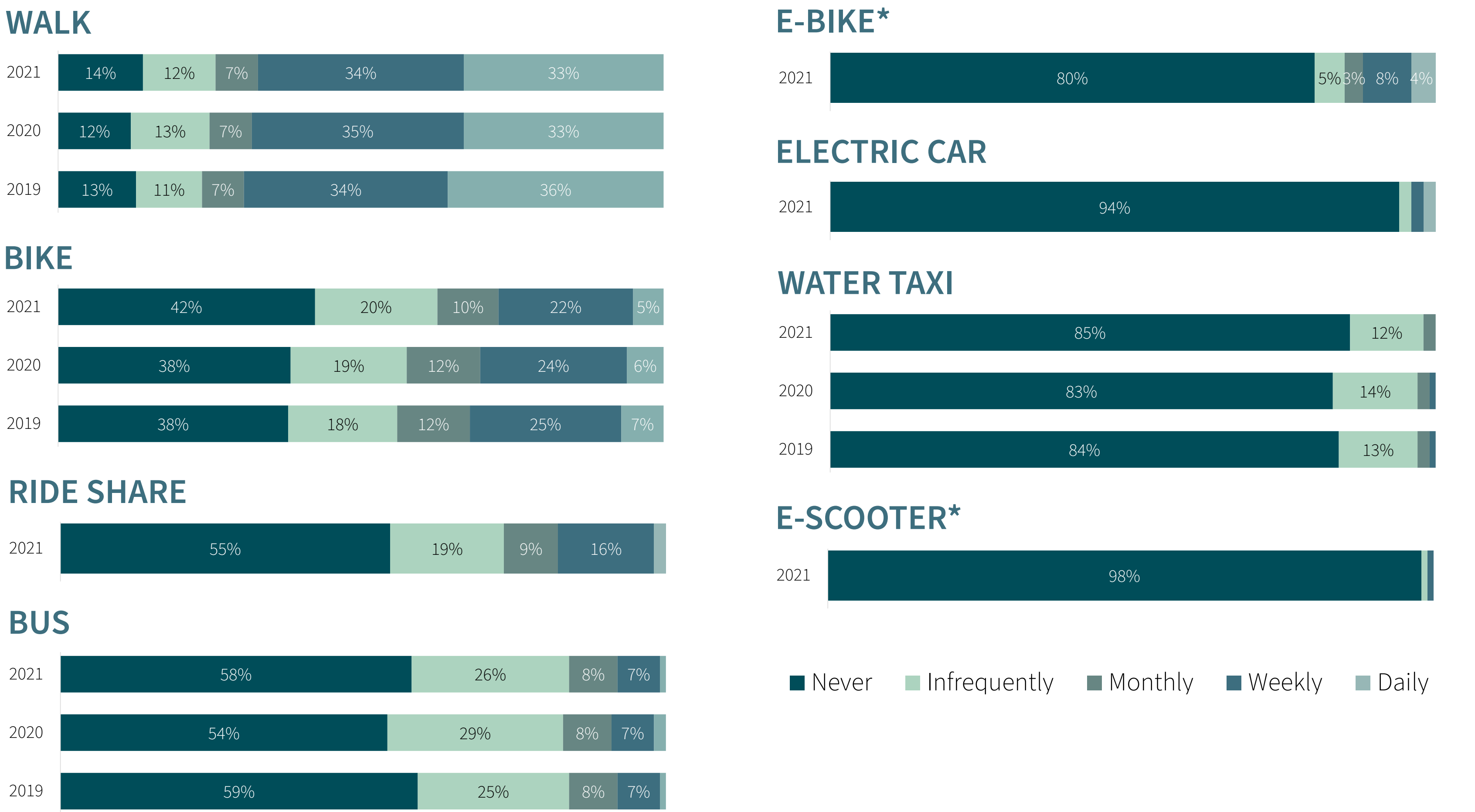
■ Never ■ Infrequently ■ Monthly ■ Weekly ■ Daily

(Base size n=671)

**Please note that in previous years, all respondents were asked this question.*
***Please note that these methods were measured together in previous years.*

TRANSPORT MODES: SPARE TIME

In respondents' spare time, walking was the most used alternative transport method, with 86% of respondents indicating they used this method infrequently, monthly, weekly, daily. On the other hand, e-scooters were the least used alternative transport method in respondents' spare time, with 98% of respondents indicating they never use this method of transport.

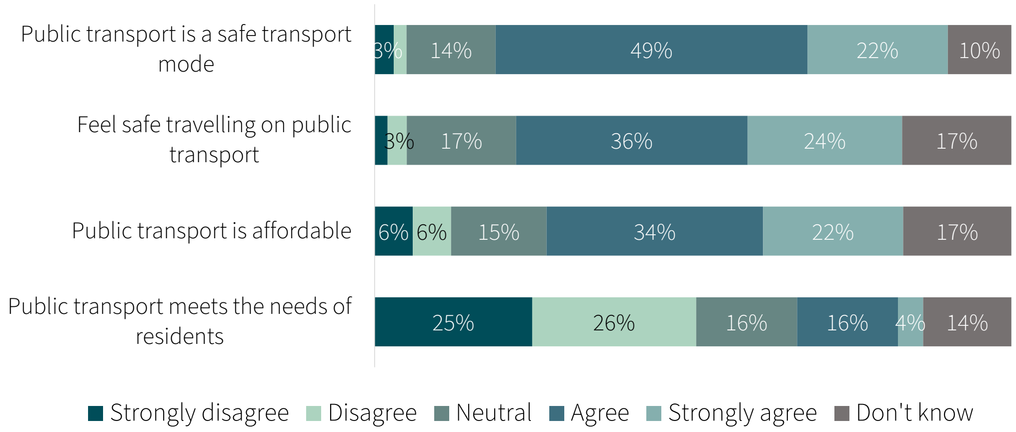


*Please note that these methods were measured together in previous years.

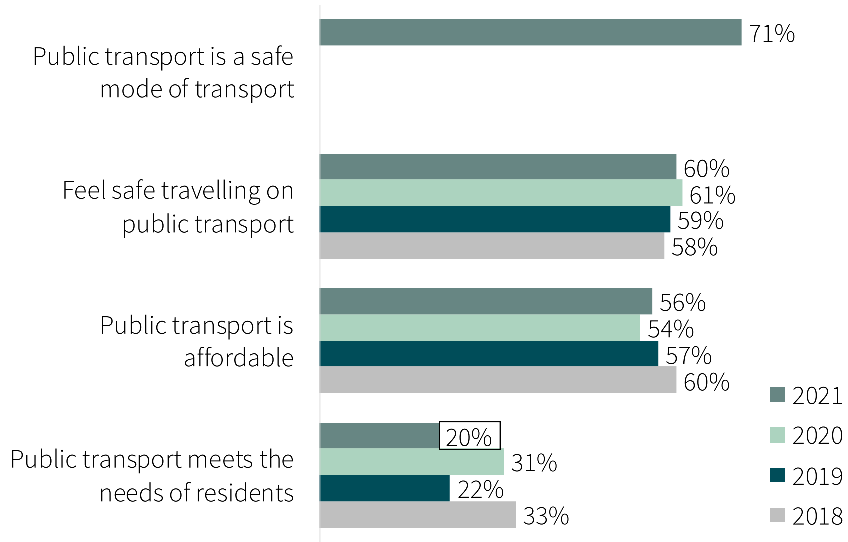
PUBLIC TRANSPORT

Seventy one percent of respondents agreed or strongly agreed that public transport in the district was a safe transport mode.
Notably, there was a decrease of 11% in the proportion of respondents who agreed or strongly agreed that public transport met the needs of residents (20% c.f. 2020, 31%).

PUBLIC TRANSPORT IN THE DISTRICT: KEY FEATURES



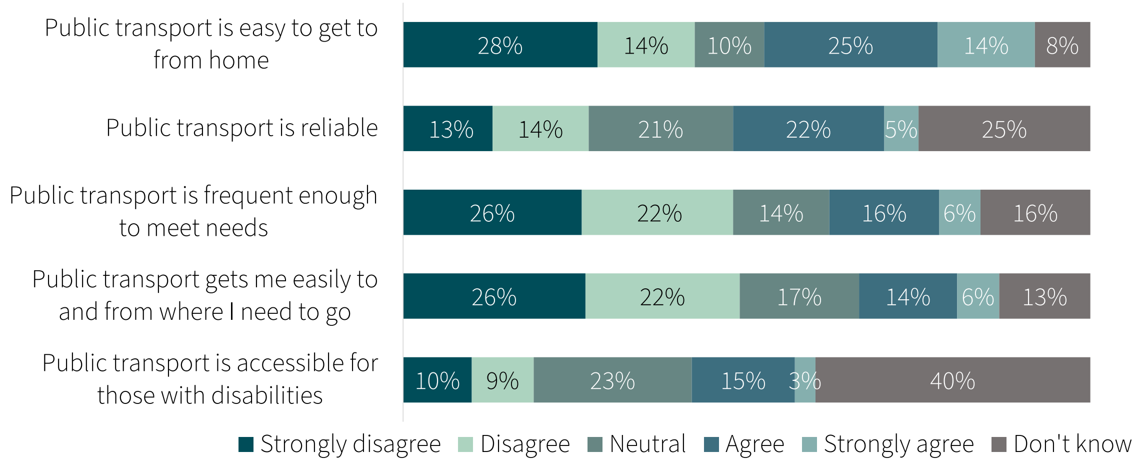
ANNUAL TRENDS: TOTAL AGREE



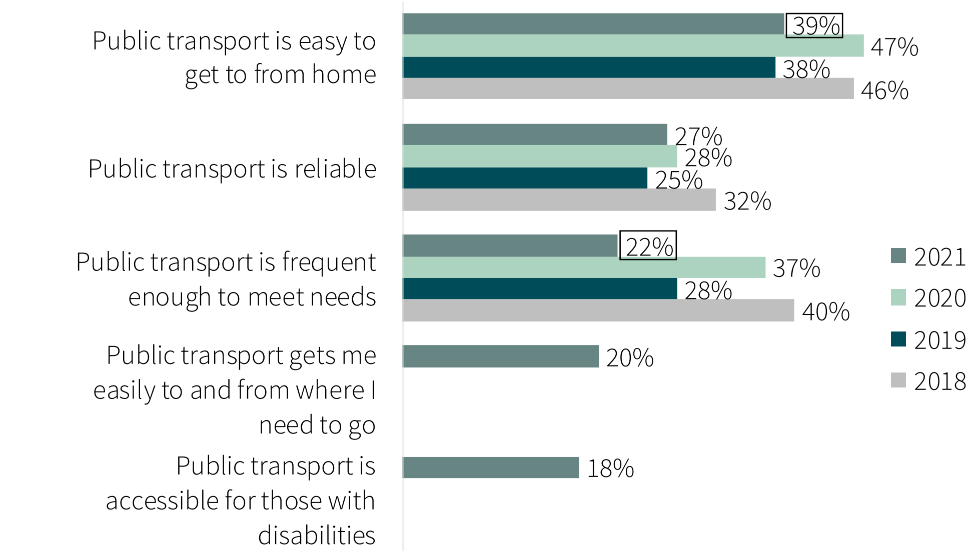
PUBLIC TRANSPORT

While respondents mostly agreed that public transport was easy to get to from home (39%), agreement ratings for this measure dropped by 8% when compared to 2020 (47%). Concurrently, just 18% of respondents agreed or strongly agreed that public transport was accessible for those with disabilities, however, this was largely offset by high 'don't know' ratings. On the other hand, respondents mostly disagreed that public transport easily got them to where they needed to go (48%) and that public transport was frequent enough to meet their needs (48%).

PUBLIC TRANSPORT IN THE DISTRICT: ACCESSIBILITY



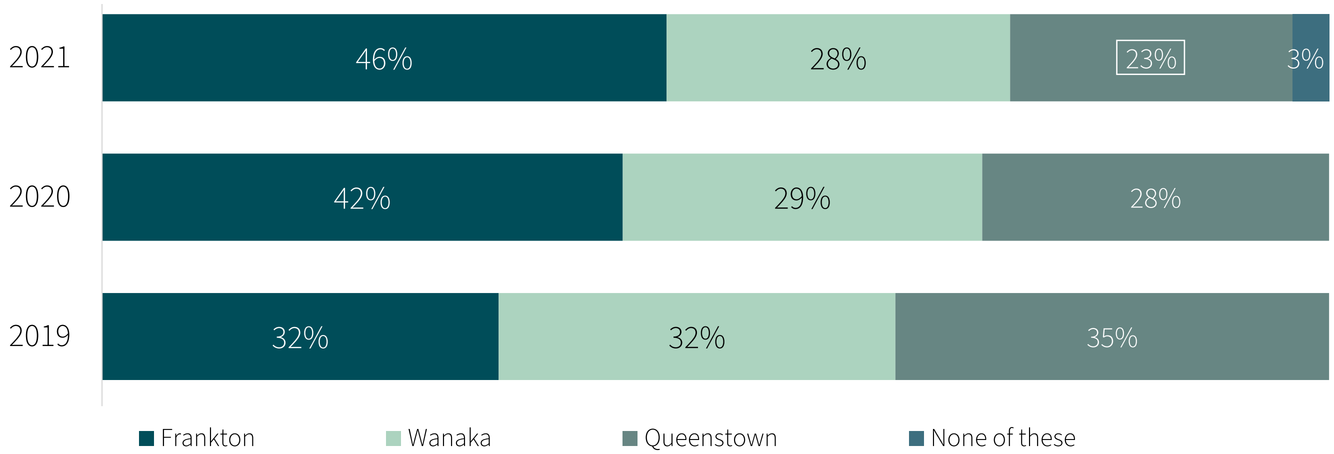
ANNUAL TRENDS: TOTAL AGREE



TOWN CENTRES

Frankton was the most used town centre amongst residents (46%). Use of this location has increased each year since 2019 (32%). Twenty eight percent of respondents said they visited Wanaka's town centre most regularly (c.f. 2020, 29%), followed by 23% of respondents who most regularly visited Queenstown's town centre (c.f. 2020, 23%).

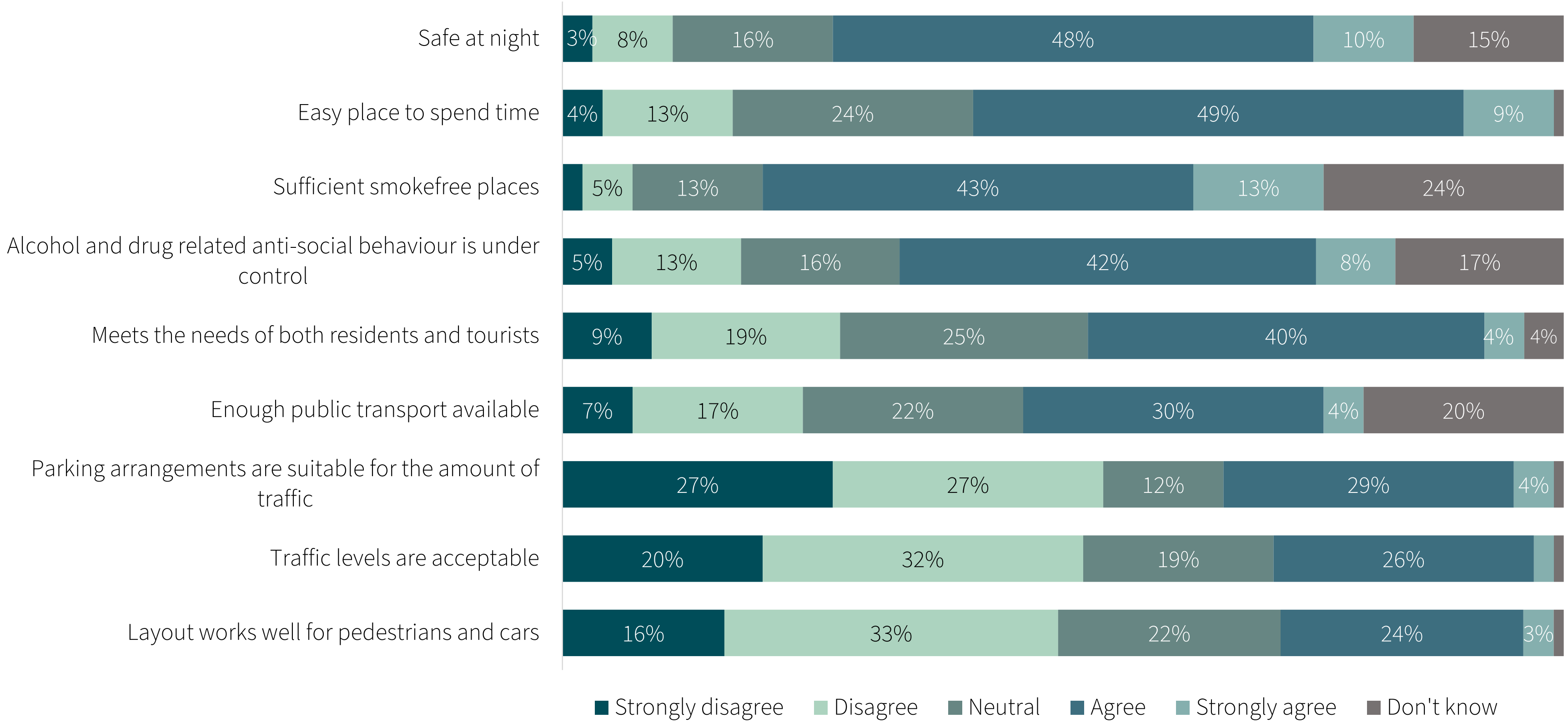
MOST REGULARLY VISITED TOWN CENTRE



TOWN CENTRES

Of the respondents who mostly visited Frankton's town centre (46%), 58% agreed (48%) or strongly agreed (10%) that the town centre was safe at night. A further 58% of respondents agreed (49%) or strongly agreed (9%) that the town centre was an easy place to spend time.
On the other hand, fewer respondents who mostly visited Frankton's town centre agreed that the layout of the town centre worked well for pedestrians and cars (27% total agree) and that the traffic levels were acceptable (28% total agree).

TOWN CENTRE CHARACTERISTICS: FRANKTON

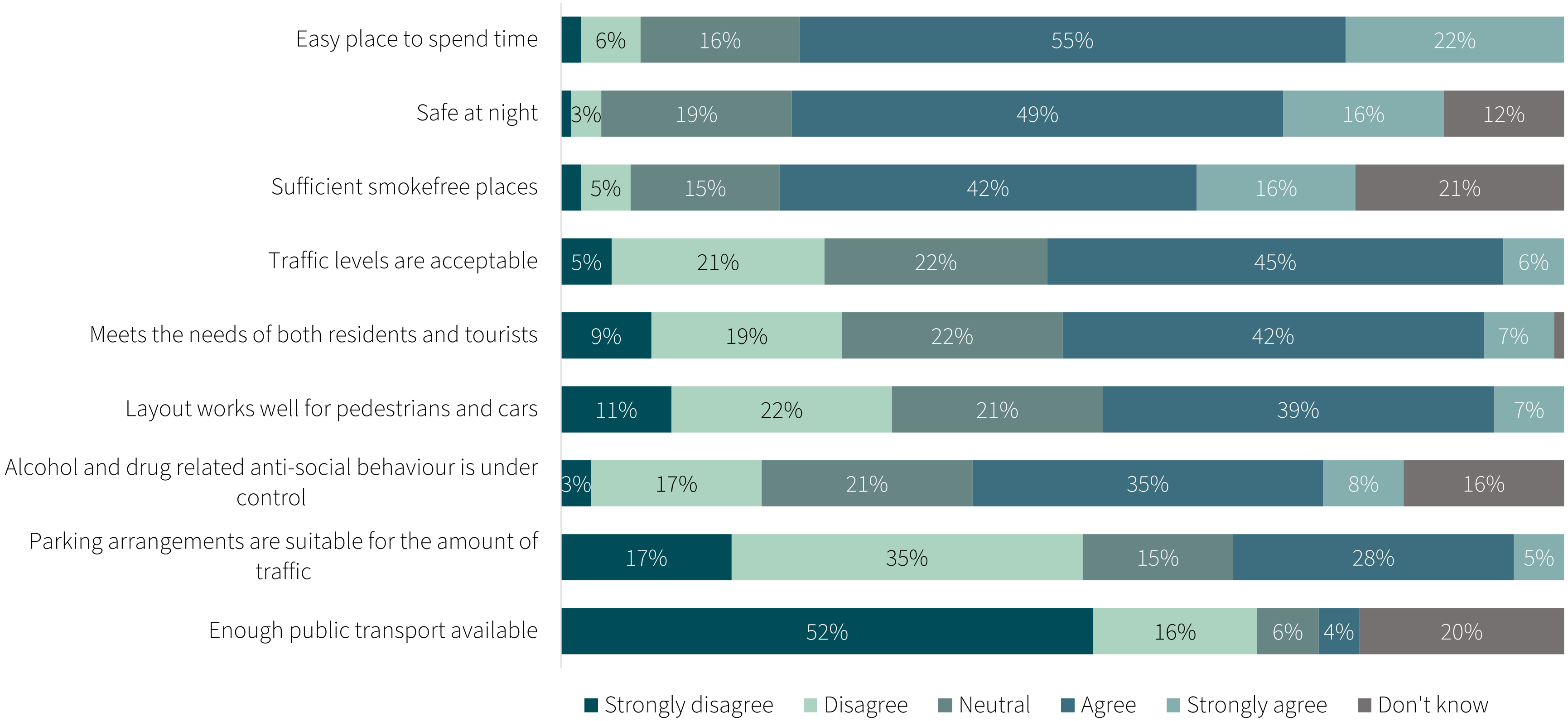


(Base size n=495)

TOWN CENTRES

Of the respondents who mostly visited Wanaka's town centre (28%), over three quarters (77%) agreed (55%) or strongly agreed (22%) that it was an easy place to spend time. This was followed by 65% of respondents who agreed (49%) or strongly agreed (16%) that the town centre was safe at night. At a lower level only 4% of these respondents agreed that there was sufficient public transport available for the town centre.

TOWN CENTRE CHARACTERISTICS: WANAKA

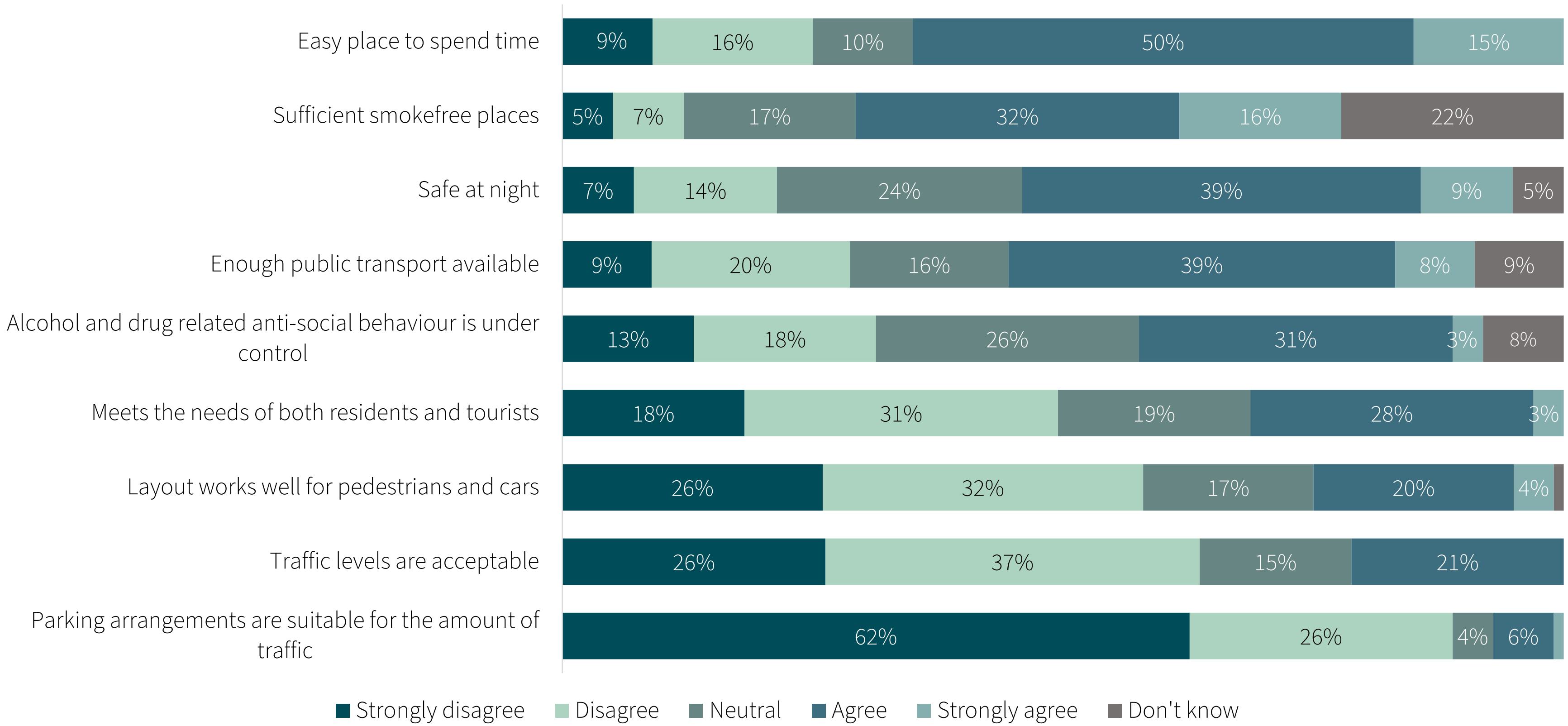


(Base size n=289)

TOWN CENTRES

Sixty five percent of respondents who mostly visited Queenstown's town centre (23%) agreed (50%) or strongly agreed (15%) that it was an easy place to spend time. This was followed by 48% of respondents who agreed (32%) or strongly agreed (16%) that there were sufficient smokefree places in the town centre. Notably, parking appeared to be the greatest issue with 88% of these respondents stating they disagreed (26%) or strongly disagreed (62%) that the parking arrangements were suitable for the amount of traffic.

TOWN CENTRE CHARACTERISTICS: QUEENSTOWN



(Base size n=224)

INSIGHTS

As has been identified in previous years, respondents' perceptions of public transport were heavily location dependent. While the majority of respondents felt transportation was a safe transport method and safe for travelling on, agreement ratings dropped drastically for elements such as reliability, meeting the needs of residents, frequency of transport etc. Notably, these measures were all affected by location variants. For example, public transport may meet the needs of respondents in one area of the district, but not in another area.

"Generally a good system, jut not for all neighbourhoods."

"Wanaka needs a bus service. Currently, there is nothing and it is lacking in a big way."

As it stands, a minority of respondents used public transport as an alternative transport method. Some respondents expressed a desire to substitute car use for public transport use, however, until the standard of service delivery increases (through frequency and convenience), this is not a viable option.

"The bus system needs to be improved… I would prefer not to drive into town for work everyday."

"The routes and timing of bus services is poor. I am unable to use this as a shift worker."

Ultimately, there was a pressing desire amongst respondents for public transport to be more evenly accessible across the district as opposed to a few areas.

Parking continues to be a pain point highlighted by respondents. Though levels varied, it was made clear that in all town centres, parking was one of the greatest issues, with lower proportions of respondents agreeing that the parking arrangements were suitable for the traffic levels.

Further comments provided by respondents validated these concerns.

"More parking spaces are required within the town precinct."

"We don't go to Queenstown now because of parking problems and cost."

Notably, concerns with public transport and parking were often synonymous. The below comment suggests that if public transport services were more accommodating, such alternatives would be used to avoid the difficulties of finding a park.

"I find it very hard finding parking and have no public transport options."

Greater use of public transport would result in the freeing up of car parking areas.

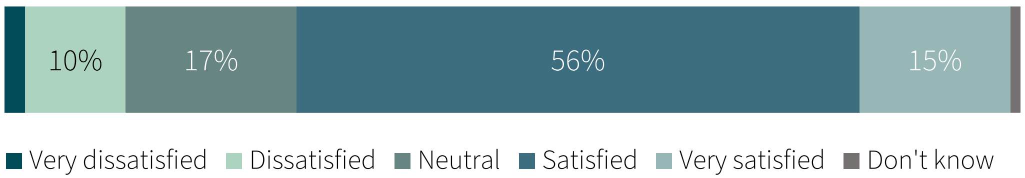
FACILITIES AND GOVERNANCE

Barriers to the use of facilities in the district, as well as respondents' satisfaction with Council's performance are detailed in this section.

FACILITIES

This year, respondents were asked to rate their satisfaction with the range of community facilities. Findings showed that over two thirds (71%) of respondents were satisfied (56%) or very satified (15%) with the range of facilities available. A further 17% of respondents indicated that they were neither satisfied, nor dissatisfied with this, while 12% expressed overall dissatisfaction.

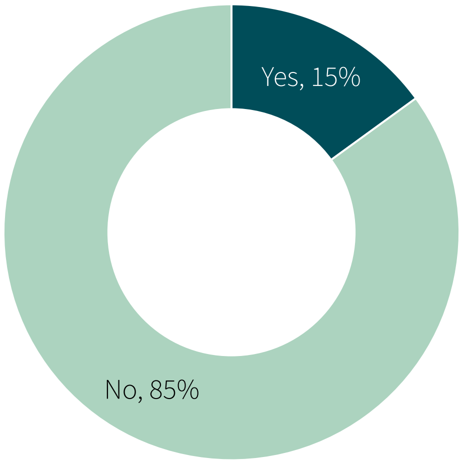
RANGE OF COMMUNITY FACILITIES



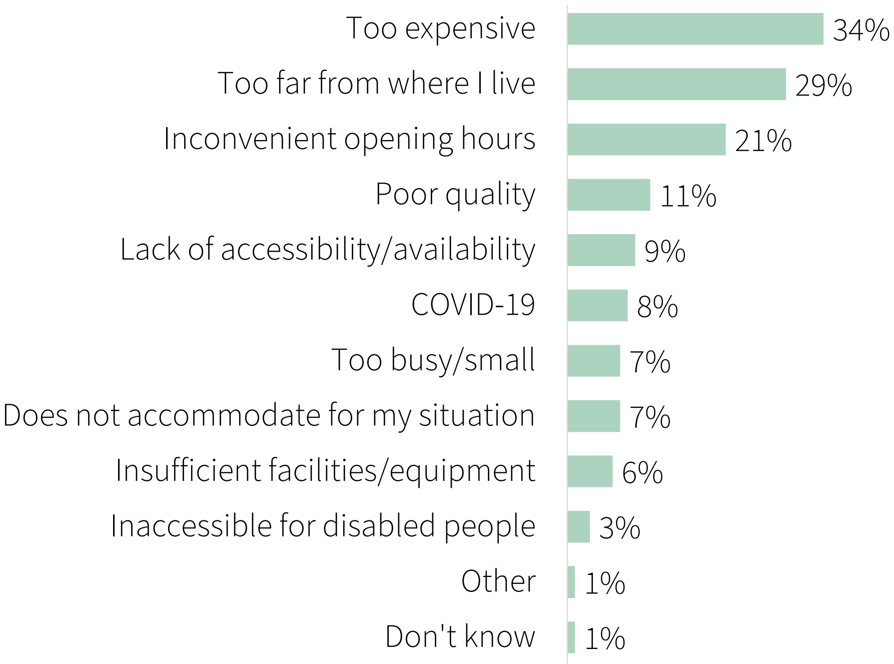
FACILITIES

Fifteen percent of respondents reported that there were elements which prevented them using community facilities, while 85% of respondents said there were not.
Of those respondents who indicated barriers to facility use (15%), over one third (34%) indicated that expenses prevented them from using community facilities, followed by 29% of respondents who stated that distance prohibited such use.
At a lower level, inaccessibility for disabled people (3%) and insufficient facilities or equipment (6%) were also cited as barriers to facility use.

BARRIERS TO FACILITY USE



BARRIERS TO USE

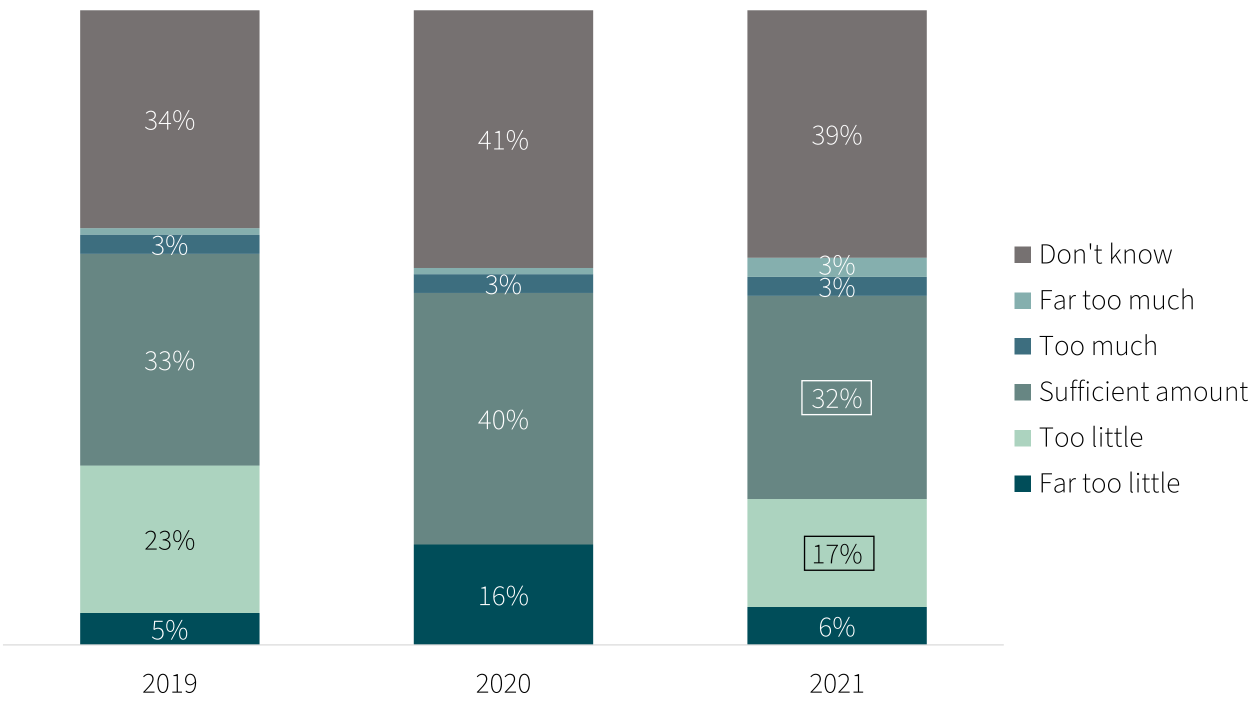


(Base size n=154)

GOVERNANCE

As has been seen in previous years, the majority of respondents (39%) were unsure whether enough money was going towards community groups (c.f. 2020, 41%). Notably however, there has been a decrease in the proportion of respondents who felt that the current allocation was sufficent (32% c.f. 2020, 40%), and an increase in the proportion of respondents who felt that there was too little or far too little currently allocated (23% c.f. 2020, 16%).

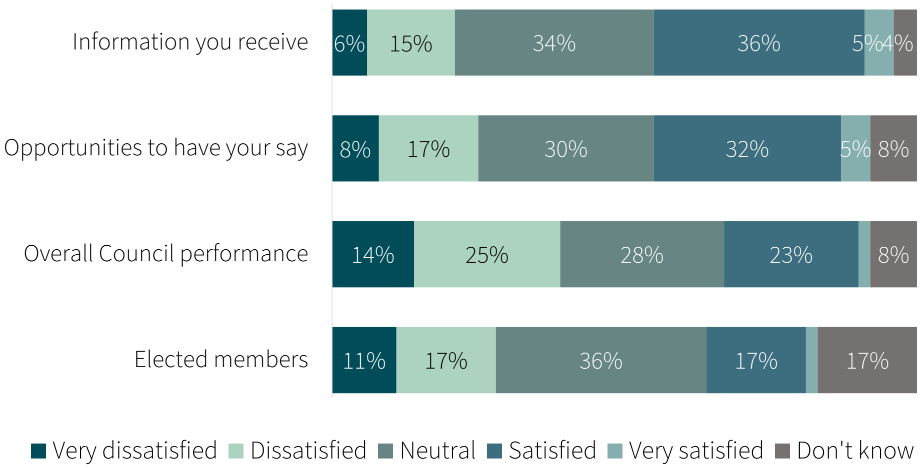
MONEY FOR COMMUNITY GROUPS



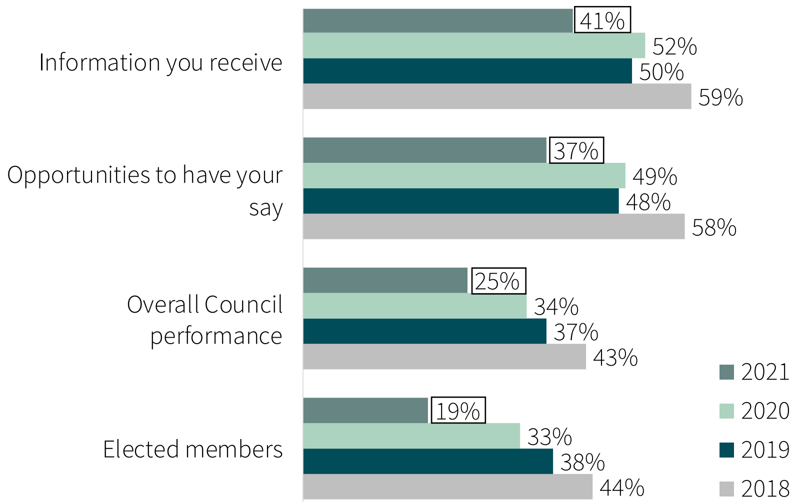
GOVERNANCE

As it pertained to Council's performance, respondents were most satisfied with the information they received (41% total satisfied c.f. 2020, 52%), followed by 37% of respondents who expressed overall satisfaction with the opportunities to have their say (c.f. 2020, 49%). Concurrently, overall satisfaction ratings were lowest for elected members (19% c.f. 2020, 33%) and overall Council performance (25% c.f. 2020, 34%).

COUNCIL PERFORMANCE



ANNUAL TRENDS: TOTAL SATISFIED



COUNCIL PERFORMANCE

The following analysis outlines key themes amongst those respondents who expressed overall satisfaction (satisfied and very satisfied ratings) and overall dissatisfaction (dissatisfied and very dissatisfied ratings) with Council's overall performance.

Overall dissatisfied

These respondents were more likely to:

Home and belonging

- Own their own home
- Disagree that their electricity is affordable
- Not have enjoyed the district's events

Transport and governance

- Disagree that public transport is accessible and suitable across a range of measures
- Be dissatisfied with the range of available community facilities
- Feel that the current amount of money provided to community groups is too little or far too much

Overall satisfied

These respondents were more likely to:

Home and belonging

- Agree that their electricity supply is reliable enough for their needs
- Be employed in the Public Administration and Safety (including local government) industry
- Agree that they can express their culture without exclusion
- Be satisfied with the current cultural offerings in the district
- Be satisfied with the celebration of tangata whenua in the district

Governance

- Be satisfied with the range of community facilities
- Feel the current amount of money provided to community groups is sufficient

INSIGHTS

Positively, most respondents expressed overall satisfaction with the range of community facilities in the district, while only a minority of respondents expressed barriers to accessing these facilities.

Facility maintenance and number of facilities were the most common improvement suggestions by respondents. Specifically, respondents highlighted that some facilities were unkempt and needed upgrading or tidying, while other respondents noted that the current facility offerings were not adequate to cater for population growth.

"Need to plan for growth and ensure that facilities meet the needs of a changing/urbanising community."

"Sports fields maintenance has dropped."

Indeed, the call for more or better facility provisions were heightened in some areas more so than others. Specifically, Wanaka was one of these areas.

"Wanaka facilities fall a long way behind Queenstown."

As it pertained to governance, satisfaction with these measures decreased this year. Interestingly, mentions of local government were often made in direct link to specific governing areas. For example, the place of government within the environmental, tourism, or services and facilities sphere.

"Council policies on tourism must favour a better balance between community needs and quality of life."

Where generic comments were made regarding QLDC, it primarily invited more transparency or communication around what plans, actions, or intentions were in place.

"I may not be paying attention, but I have no idea what QLDC are doing…"

As was highlighted under the environment section, greater efforts on QLDC's behalf to communicate and publicise Council's initiatives and efforts could go a long way in shifting or alleviating some of the negative perceptions currently held amongst residents.

TOURISM

This section looks at both the advantages and disadvantages of tourism on respondents' quality of life. It also outlines measures which respondents would like to see introduced to better manage the effects of tourism and tourists on the district.

IMPACTS OF TOURISM

This year, respondents were provided with a list of elements associated with tourism and were asked to select up to five of those elements which most affected their quality of life in a positive way. The highest proportion of respondents felt that the growing network of cycling and walking trails positively affected their quality of life (59%), followed by greater efforts to improve and restore the environment (50%). At a lower level, respondents felt the increase of employment opportunities (13%) and a stronger emphasis on Māori heritage (14%) was a positive side-effect of tourism.

TOURISM AND POSITIVE IMPACTS ON QUALITY OF LIFE*

	%
Comprehensive and growing network of cycling and walking trails	59%
Greater effort to improve and restore the environment	50%
Better road infrastructure	39%
Range of hospitality, bars, cafes, restaurants and nightlife	36%
Airport with regular scheduled national and international flights	33%
Range of outdoor adventure activities	35%
Better social amenities, like public toilets, parks and open spaces	32%
More arts, culture, events and heritage experiences	27%
Diversity created by a broader mix of people in the community from different countries and cultures	26%
More vibrant town centres	26%
Public transport in the district	24%
Choice of retail and shopping opportunities	23%
Stronger emphasis on telling stories about our Māori and non-Māori heritage	14%
More employment opportunities because of tourism	13%
The opportunity to earn income by renting your home through sites like AirBnB	8%

IMPACTS OF TOURISM

Respondents were also asked what aspects of tourism impacted their quality of life negatively. Half of respondents indicated that traffic congestion had a negative impact on their quality of life, followed by the burden on ratepayers to fund elements to cater for visitors (42%).
At a lower level, queues in shops (1%) and carbon emissions from rental vehicles and camper vans (7%) were also cited as negative side-effects of tourism.

TOURISM AND NEGATIVE IMPACTS ON QUALITY OF LIFE*

	%
Traffic congestion	50%
Burden on ratepayers to fund infrastructure and amenities that must also cater for visitors	42%
Higher cost of daily living	46%
Higher house prices and rents	42%
Pressure on public parking spaces	35%
Impacts on biodiversity and environmentally sensitive areas caused by too many visitors	29%
Low wage jobs	30%
Freedom camping	22%
Dangerous driving	24%
Waste and litter	22%
Rowdy, drunken, and abusive behaviour by visitors	19%
People renting out their own houses through sites like AirBnB	16%
Large numbers of short-term rental accommodation units	16%
Lack of work choice – tourism is the only game in town	15%
Undermining the local community identity and sense of place	14%
Increased rates of crime	13%
Noise from aircraft and helicopters	12%
Visitors crowding locals out of campsites and other local amenities	10%
Carbon emissions from aircraft	8%
Carbon emissions from rental vehicles and camper vans	7%
Queues in shops	1%

MANAGEMENT

Respondents were asked to select up to five management tools they would like to see implemented to better manage the impact of tourism in the district. Over half (52%) of respondents wanted to see a broader range of non-tourism businesses, followed by 48% of respondents who felt the imposition of a local visitor levy was needed, and 42% of respondents who wanted to see a general visitor level charged for entry into New Zealand.

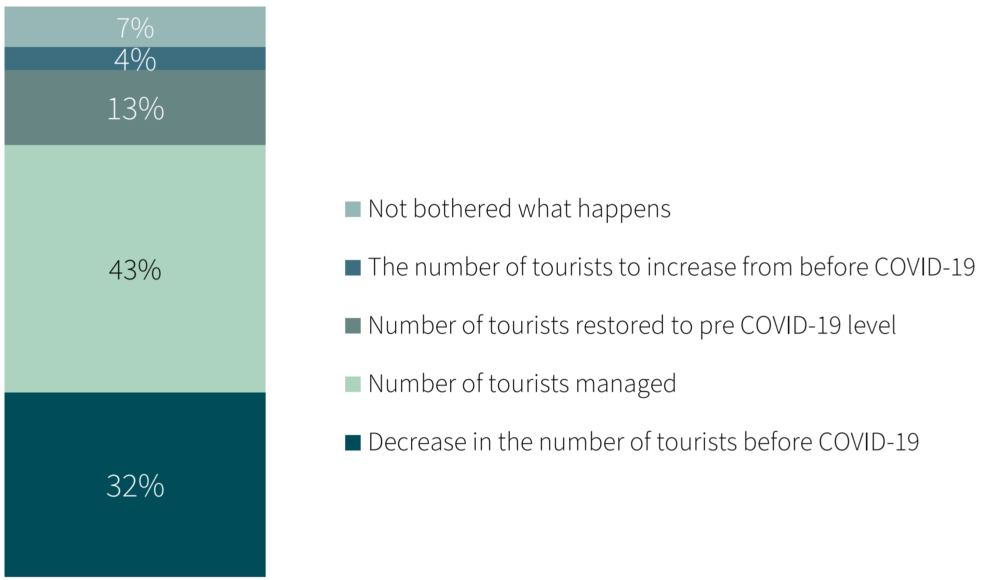
TOURISM MANAGEMENT TOOLS

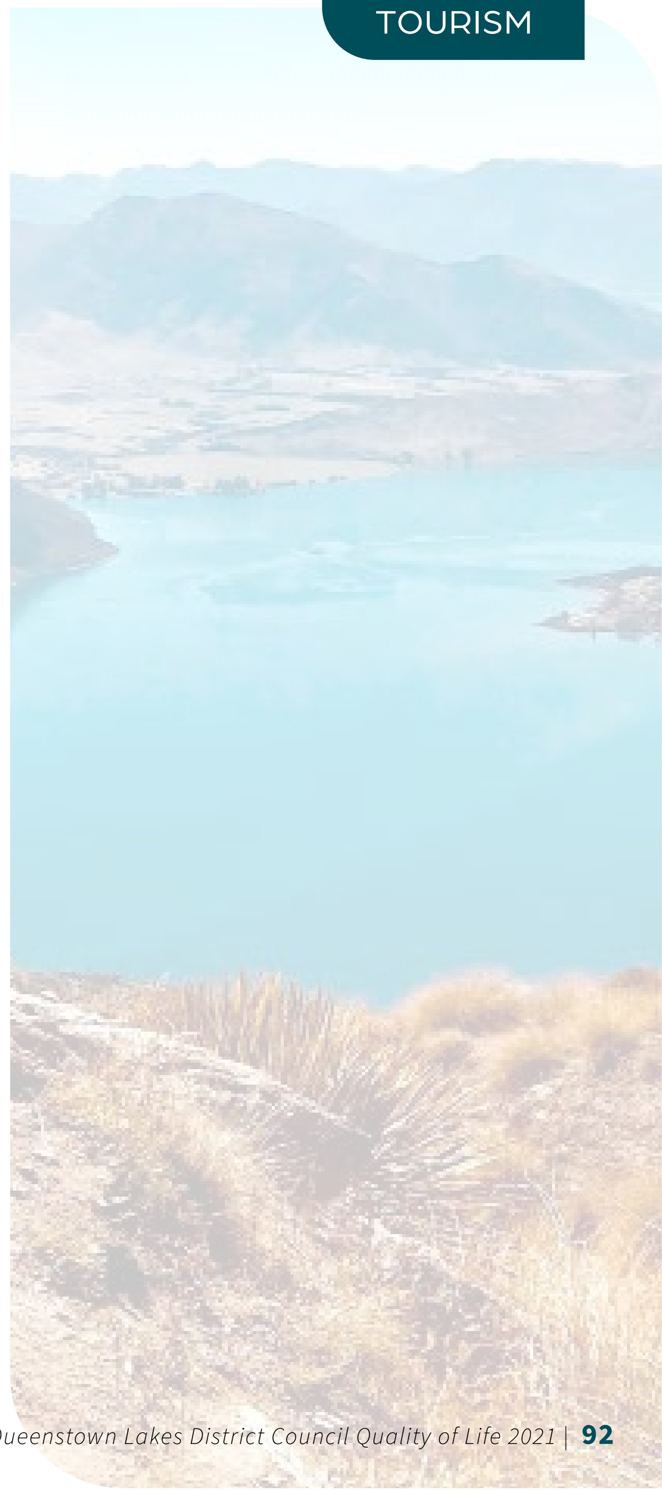
	%
Encourage a broader range of non-tourism businesses	52%
Local visitor levy to cover the true costs that visitors impose on our community	48%
General visitor levy charged for entry to New Zealand	42%
Better management of freedom camping	40%
Development of a destination management plan to guide our region toward regenerative tourism by 2030	38%
Charging higher prices for tourists and non-resident visitors versus locals	36%
Marketing to attract tourists and visitors whose values fit with the values of our community	33%
Promote touring routes that disperse visitors more evenly across the southern regions	30%
Better management of casual visitor accommodation like AirBnB through resource management reform	28%
Government to limit the total number of visitors	20%
Limit carbon emissions associated with the tourism and visitor economy, rather than visitor numbers	20%
Infrastructural solutions to accommodate numbers	1%
Improved transportation regulations/plans	1%

TOURISTS

When asked about the reintroduction of international tourists into New Zealand, the highest proportion of respondents would like to see the number of visitors managed (43%), followed by 32% of respondents who would like to see a decrease in the number of tourists which was seen prior to COVID-19. A further 13% of respondents would like to see the number of visitors restored to the pre COVID-19 level, and 4% of respondents would like to see an increase in the number of tourists from before COVID-19. Seven percent of respondents stated they were not bothered.

REINTRODUCTION OF INTERNATIONAL TOURISTS





TOURISTS

Respondents were asked how they would like to see tourism and the visitor economy contribute more to the community and local environment. Responses provided verbatim comments and these responses were post-coded during analysis into the groups shown below. Responses from participants largely reflected the management tools highlighted previously. That is, 29% of respondents would like to see a visitor tax or charge imposed onto tourists, while a further 15% of respondents would like to see tourist numbers limited. An additional 10% of respondents would like to see improved management of freedom camping.

CONTRIBUTION OF TOURISM AND VISITOR ECONOMY (TOP 15)

	%
Charge visitor levy/tax/bed tax to fund infrastructure	29%
Limit tourist numbers/longer stays	15%
Management around freedom camping	10%
Greater focus on community	9%
Focus on higher value tourists	5%
Tourism/rental car companies contribute to costs associated with the impact of tourism	5%
Opportunity to promote the wider region, culture, history and scenery as a tourist destination	5%
Quality not quantity tourism/Educate tourists on regenerative practices	4%
Promote alternative forms of transportation/Reduce carbon footprint	4%
Impact on environment through tourism	4%
More emphasis on development of sustainable industries	4%
Industry diversification	4%
Council needs to be accountable for spending/Update infrastructure	2%
Reduce/ban AirBnB/short-term accommodation	2%
Tourist road education	2%

(Base size n=353)

INSIGHTS

The topic of tourism has typically generated negative response given the perceivably far-reaching impacts that it has on the district's environment, living costs, and community connectedness. This year, QLDC and its partners at the RTO wanted to understand both the positive and negative elements that respondents attributed to the tourism sector.

For the most part, a comprehensive source of facilities, both publicly (i.e. cycling and walking trails) and privately (i.e. cafes and bars) is the main perceived benefit of a robust tourism sector.

"I love tourism, it is part of our bread and butter being hospitality professionals."

However, when it came to commenting on the place of tourism in the district, resistance was still very much apparent and for the same reasons seen in previous years. More specifically, respondents called for formal and informal measures to be put in place to regulate the quantity of tourists.

Informal measures generally highlighted the push to attract quality tourists over the quantity of tourists.

"Stop thinking more people is better! We want quality tourism over quantity."

As has been highlighted in previous years, quality was often associated with higher spending tourists who while visiting, will offer a worthwhile contribution to the economy and local businesses ultimately ensuring that the district benefits economically from such visits. By comparison, low quality tourists were considered to be those like freedom campers who visit, and participate in free or low-cost activities, spending very little and contributing minimally to the local economy, yet leaving an environmental footprint on the district.

Formal measures were elements requiring government regulation such as fees associated with visiting the district. For example, a visitor levy, a bed tax, or price differentiation depending on peoples' local or visiting status.

"Have a tourist tax at the border."

In previous years, the resentment expressed towards tourism was expressed in a binary fashion. Last year, and now this year, further questions have highlighted that the sentiment is more complex and that the district does welcome tourism, but only if it is effectively managed to avoid residents' needs being secondary to those of visitors.

"I'm not against tourism, I'm just disappointed tourism became mass tourism. Number have to be managed."

"Council policies on tourism must favour a better balance between community needs and quality of life, and corporate interests. Currently corporate interests dominate."

A secondary issue here is the perception that Council relegates the voice and concerns of locals in this space, and rather 'walks to the beat of their own drum'. One example has been the threat of an airport in Wanaka. This echoes sentiments shared from respondents in previous years.

"Council needs to gain the trust of the community and that they are going to look after the area, not just fill their pockets."

As was highlighted in previous sections, transparency and open communication with residents' and local communities appears to be one of the key barriers to finding a community/Council equilibrium. Being more open, while equally listening and acting accordingly can go a long way in fostering residents' support of tourism.

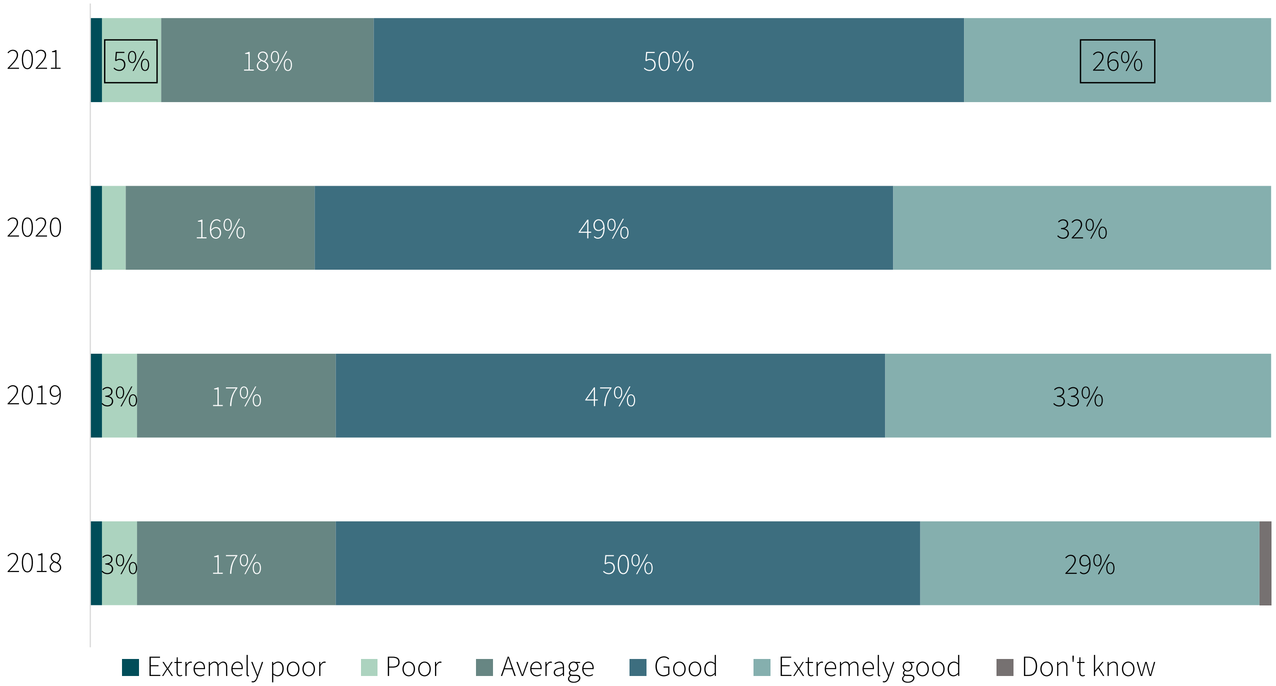
QUALITY OF LIFE

This section details how respondents rate their overall quality of life in the district.

QUALITY OF LIFE

This year has seen a decrease in the proportion of respondents who rated their quality of life as either good (50% c.f. 2020, 49%), or extremely good (26% c.f. 2020, 32%). This decrease was coupled with an increase in neutral ratings (18% c.f. 2020, 16%), as well as an increase in overall poor ratings (6% c.f. 2020, 3%).

OVERALL QUALITY OF LIFE



QUALITY OF LIFE

Each year, and albeit in different forms, profiling around quality life ratings have been provided to better understand who in the district is struggling or prospering, as well as the key determinants of a poorer or higher quality of life.

The following pages identify key trends amongst those with an overall poor and average quality of life (poor and extremely poor ratings) and those with an overall good quality of life (good and extremely good ratings). It should be noted that in previous years, poor and average ratings have been separated for profiling. However, results have shown that while there may be very slight variances between these groups, more often than not, these respondents have been met with the same problems be it social or economic.

The nature or circumstances of respondents who reported an overall poor or average quality of life this year is a direct match to the respondents who have rated their quality of life as poor or average in previous years. Ultimately, these respondents are disadvantaged in financial, social, and physical ways.

Specifically, these respondents earned a lower income which exacerbated their social issues. Namely, limited financial resources became a barrier to accessing healthcare, home heating, and their ability to cover basic expenses.

With a higher likelihood of rating their mental wellbeing as poor, it can be assumed there is a correlation here with the aforementioned financial strains. Though it is positive that these respondents had a higher access rate to mental health services, their reported barriers to accessing such services were also higher.

Interestingly, these respondents were more likely to be employees of a business in the district, yet job satisfaction levels, and job development aspects were far lower. Thus, these respondents also displayed negative sentiments towards, and experiences with, their employment.

On the other hand, respondents who rated their quality of life as good or very good experienced a greater sense of security. The financial, physical, and social aspects of these respondents' lives appeared more stable and prosperous.

These respondents had a higher income with sufficient levels of disposable income. These economic privileges meant fewer barriers to healthcare, ease of heating their home, and an ease of meeting every day expenses.

At a social level, these respondents appeared better connected with their neighbourhoods which ultimately heightened their sense of belonging and support.

Indeed, these social and economic benefits meant that when asked about their mental wellbeing, these respondents were more likely to rate it as good.

QUALITY OF LIFE

Overall poor and average quality of life

These respondents were more likely to:

Demographics and home

- Identify as female, be aged 39 years or younger, and/or identify as an ethnic minority
- Earn and income of $60,000 or less with no disposable income or an inability to cover their expenses
- Rent their space or home
- Be unable to heat their home, with a proportionately higher number stating that affordability was the main barrier
- Disagree that electricity is affordable

Employment

- Be an employee of a business in the district
- Disagree that their work is fulfilling, that they have learnt something, and/or they have developed adaptable skills
- Have had a range of changes to their own employment because of COVID-19

Belonging

- Unable to express their own culture and have not participated in any of the district's cultural events
- Not intend on staying in the district, or be unsure because of affordability
- Indicate a sense of isolation or less engagement with their neighbourhood (e.g. disagrees that living in their neighbourhood gives them a sense of community or belonging)

Facilities and governance

- Rate measures relating to QLDC negatively (e.g. QLDC's environmental efforts as well as their governance measures)
- Be dissatisfied with the range of community facilities available

Health

- Be less resilient (e.g. less optimistic, feel less supported etc.)
- Identify a range of barriers to accessing a medical professional (e.g. cost, embarrassment etc.)
- Have accessed the after hours services and/or the emergency department for an injury, illness, and/or mental distress
- Rate their mental wellbeing as poor
- Have accessed a range of mental health services and community support
- Identify a number of barriers to accessing mental health services (e.g. disagrees that there are sufficient services, and/or that existing services can be accessed at a suitable time and location).

QUALITY OF LIFE

Overall good quality of life

These respondents were more likely to:

Demographics and home

- Identify as male, be aged 65 year or older, and/or identify as European/ Pākehā
- Earn an income of more than $200,000 and/or have sufficient levels of disposable income
- Own their own home
- Be able to heat their home
- Agree that their electricity supply is reliable enough for their needs and/or agree that it is affordable

Belonging

- Have participated in the district cultural events
- Intend on staying in the district
- Indicate a higher sense of community connectedness and engagement (e.g. agree that they have a strong and active community in their neighbourhood etc.)

Employment

- Be retired
- Not be an employee of a business in the district
- Agree that they find their work fulfilling, they have learnt something new, and/or they have developed adaptable skills
- Have not had changes made to their employment
- Have a greater sense of job security

Facilities and governance

- Rate measures relating to QLDC more positively (e.g. QLDC's environmental efforts as well as their governance measures)
- Be satisfied with the range of community facilities available

Health

- Be more resilient (e.g. optimist, able to cope with challenges etc.)
- Rate their mental wellbeing as good
- To agree that mental health services are accessible (e.g. there are sufficient services, and/or nothing stops them from accessing services etc.)

DISCUSSION OF FINDINGS

DISCUSSION OF FINDINGS

The following summary discusses key themes that emerged from this year's Quality of Life Survey. Key themes or issues facing the district in 2021 remain largely unchanged from previous years, thus reiterating the depth and complexity of these challenges.

Following this, key findings will be discussed within the context of the wellbeing framework. This framework looks at the social, economic, environmental, and cultural wellbeing aspects of the district. Greater detail around the significance and role of this framework will be provided below.

While most respondents experienced an overall good quality of life, it was the same people experiencing, and same challenges causing, a lower quality of life as seen in previous years.

Most respondents expressed an overall good quality of life. Since 2018, this has been consistent and argues that despite the unique day to day challenges that residents face, most can still be content and thrive with the life they have chosen to lead in the district.

Despite this, there was a significant decrease in the proportion of respondents who rated their quality of life as extremely good this year. This was balanced by a significant increase in the number of respondents who rated it as poor. The recent lockdown periods could have impacted or even tainted respondents' perception of their quality of life. However, economic and social elements, or the lack thereof, drove these lower quality of life ratings and this is consistent with findings from previous years. Ultimately, little has changed to alleviate such pressures for these residents. An example provided this year validated that access to amenities such as electricity and heating has become more expensive.

While the elements which drive a poorer quality of life in this district are likely the same elsewhere, it seems that these same challenges are exacerbated due to higher living costs, perceivably limited employment opportunities, and/or below living wage pay.

Respondents wanted to see greater transparency and public consultation from Council.

Although shown in previous years, a call for more proactiveness on Council's behalf was heightened in this year's study. While some responses indicated a sense of dissatisfaction with specific actions taken from Council, other responses suggested that the root issue was an absence of communication and openness from Council.

Specifically, respondents urged that Council showed greater transparency in matters relating to the environment, general governance, infrastructural development, and services/facility provision. That is, greater consultation and communication with residents relating to these areas, and more.

Some respondents questioned the intent of Council where transparency and consultation lacked. Though this was often expressed through the questionable prioritisation and use of funds, the true sentiment of respondents arguments often looked at who Council was championing for. For example, is the increasing rate of infrastructural development in the best interest of the district's environment and its residents, or is it economically driven? Another key example is that of tourists, whereby some respondents feel that Council heeds the needs and desires of tourists before those of residents (e.g. industrial expansions such as proposed airports and minimal restrictions around Airbnb style accommodation etc.)

DISCUSSION OF FINDINGS

Though transparency and consultation may not change residents' ideals or views, making residents feel heard and providing reasoning behind certain decisions and/or actions may dilute current tensions between the Council/resident relationship.

After the initial impacts of COVID-19, it appears that respondents were re-adjusting to a new sense of normal.
Last year, findings showed that the introduction of COVID-19 exacerbated outstanding issues in the district through the impacts it had on employment and business operations.

This year, there was a decrease in the proportion of younger aged respondents (under 40 years of age). Though this could be a result of chance, fewer respondents employed by the tourism and construction industries, as well as fewer respondents in lower-skilled base roles suggest otherwise. That is, it is likely that job security reported by current residents is in part due to fewer employable residents in the area, many of which may have left due to the effects of COVID-19 on the job market.

Notably, those younger aged respondents and those who identify as an ethnic minority show signs of greater struggle. Challenges for these respective demographics include, but are not limited to, greater difficulty heating their home, lower likelihood of being registered with a doctor, poorer levels of mental health, and greater financial struggles. Indeed, these struggles are often interrelated in that a lower income contributes to an inability to heat one's home and so forth. This contributes to the complexity of the issue/s at hand, whereby they cannot be fixed by solely focusing on impacted demographic groups (e.g. younger aged respondents and/or those identifying with an ethnic minority).

At a general level, findings showed signs of a strengthening economy (e.g. fewer changes made to jobs, greater attentiveness to employee wellbeing etc.) and this may come with far-reaching positive impacts such as improved mental wellbeing and lessened financial burdens etc.

Regardless, the uncertainty of the last year has continued to highlight the importance of diversifying the local economy given the impact that an absence of tourists has had

Though QLDC facilitate the social, economic, environmental, and cultural wellbeing of their district's communities, various organisations in the district contribute to the sustenance of these wellbeings. To this, the following analysis discusses the implication of this year's findings on various components of the wellbeing framework.

Social
Just under half of respondents rated their mental wellbeing as neutral, poor, or very poor. Susceptibility to financial strains and alienation in a social sense (i.e. lack of community connectedness) appeared to be key contributors to a lower state of mental wellbeing. Most concerning was that these respondents were more likely encounter barriers to accessing mental health services; a key component in improving their mental health.

On the other hand, respondents who rated their mental health as good or very good experienced a greater sense of financial freedom, a greater sense of social connectedness, and were more likely to be older in age. Unlike those with poorer levels of mental health, these respondents were more likely to say they were unsure about the availability of mental health services. Although these respondents

DISCUSSION OF FINDINGS

may not have a personal need of such services, it is worrying and perhaps a further indication of these matters being suppressed due to negative stigmas. Irrespective of one's mental state, greater knowledge and openness about the topic may improve the lingering stigma associated with it. This may result in greater comfort in accessing the required services.

Economic

High living costs continue to confront residents in the district. Findings suggest that those who live in the district do so because they can afford to. However, the ever-increasing living costs continue to threaten and alienate a proportion of the district's population. While those who are in better financial positions do not personally struggle to meet their basic needs, many respondents perceive the injustice of such high costs.

Ultimately, those who face the difficulty of meeting their living costs encounter other issues where they are forced to compromise other important aspects of their life. For example, accessing health care services, mental health services, or even doing things for themselves to improve their mental wellbeing.

Indeed, the economic dependence on the tourism and hospitality sector, and consequential low-skilled and paid jobs does not assist the above issues. The current dependence of the local economy on the tourism and hospitality industry means there are few supported industries that foster career progression and the increased income that comes with that.

As an aside, and as previously stated, improved job security and fewer changes to employment showed signs of a strengthening economy, at least for employees. Although fewer changes to businesses indicates a sense of stabilisation for business owners, these residents are still operating on the edge and are still making changes where possible, particularly for smaller businesses.

Environmental

Year after year, respondents have proven that the district's population is very environmentally conscious. This has primarily been driven by the urge to protect the natural beauty of the district's surroundings.

Though this is not new, respondents expressed concerns that environmental matters are not prioritised by Council with a focus on economic benefits instead. For example, respondents have expressed yearly concern with the environmental impact of retaining and fostering a high level of tourism. The consequence of this growth has meant the need for increased infrastructural development, increased transport, and increased waste/pollution etc. All of these come at the expense of the natural environment, which for many residents, is the reason they live where they do.

Though the complete elimination of the above tension is unrealistic, there is a current mismatch between the perceived motives of Council, and the good intentions of residents. While not all residents' concerns can be resolved, a greater effort on Council's behalf to engage with residents on issues relating to environmental actions would be beneficial for both parties.

Cultural

This year (likely impacted by greater social freedom), there were positive shifts within the cultural space. That is, more respondents participated in cultural events, more respondents identified with a culture, and a high proportion of respondents supported the growth

DISCUSSION OF FINDINGS

of public art. Ultimately, the cultural aspect of the district seemed warmly welcomed and celebrated.

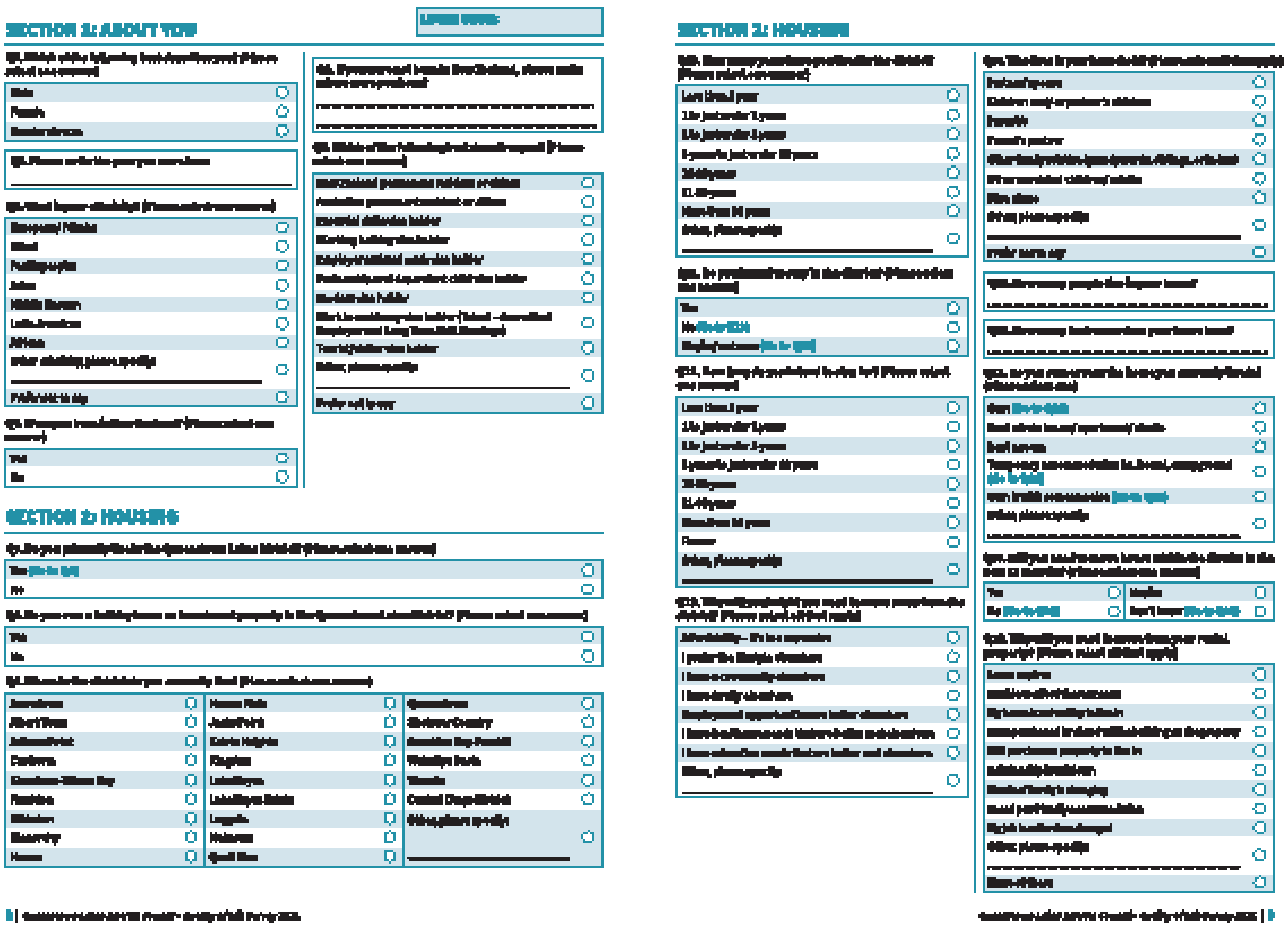
Last year, the urge to incorporate Māori culture was a dominant theme. This year, it was heightened even more so. A greater call to incorporate language and practice elements of Māori culture were ways respondents suggested such integration.

Final considerations

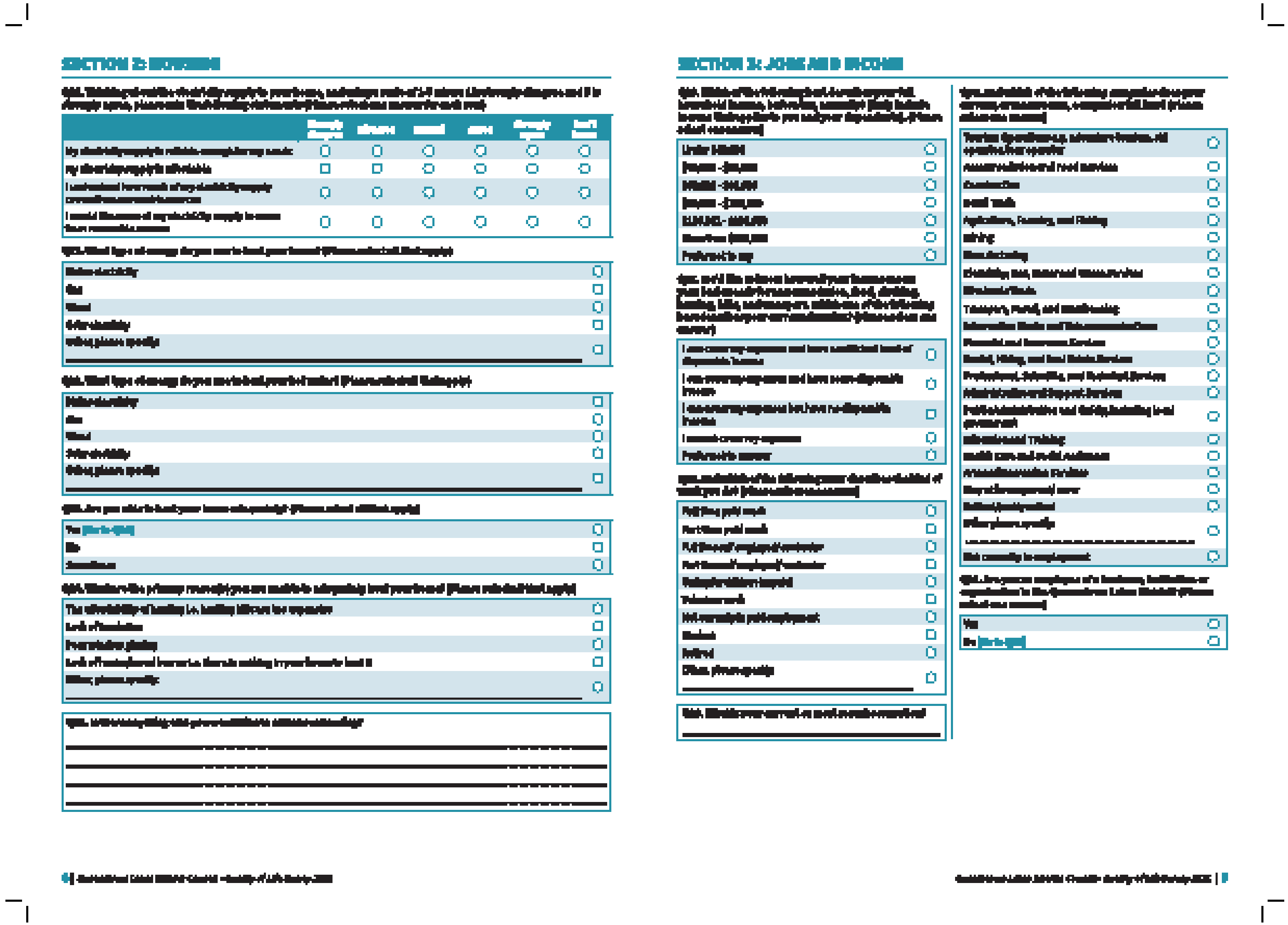
The onus to rectify the above challenges requires a united effort. Indeed, QLDC plays a critical role here. However, it is also the responsibility of partner organisations, communities, and individuals to determine ways that they can contribute to the alleviation, improvement, and rectification of these issues.

APPENDICES

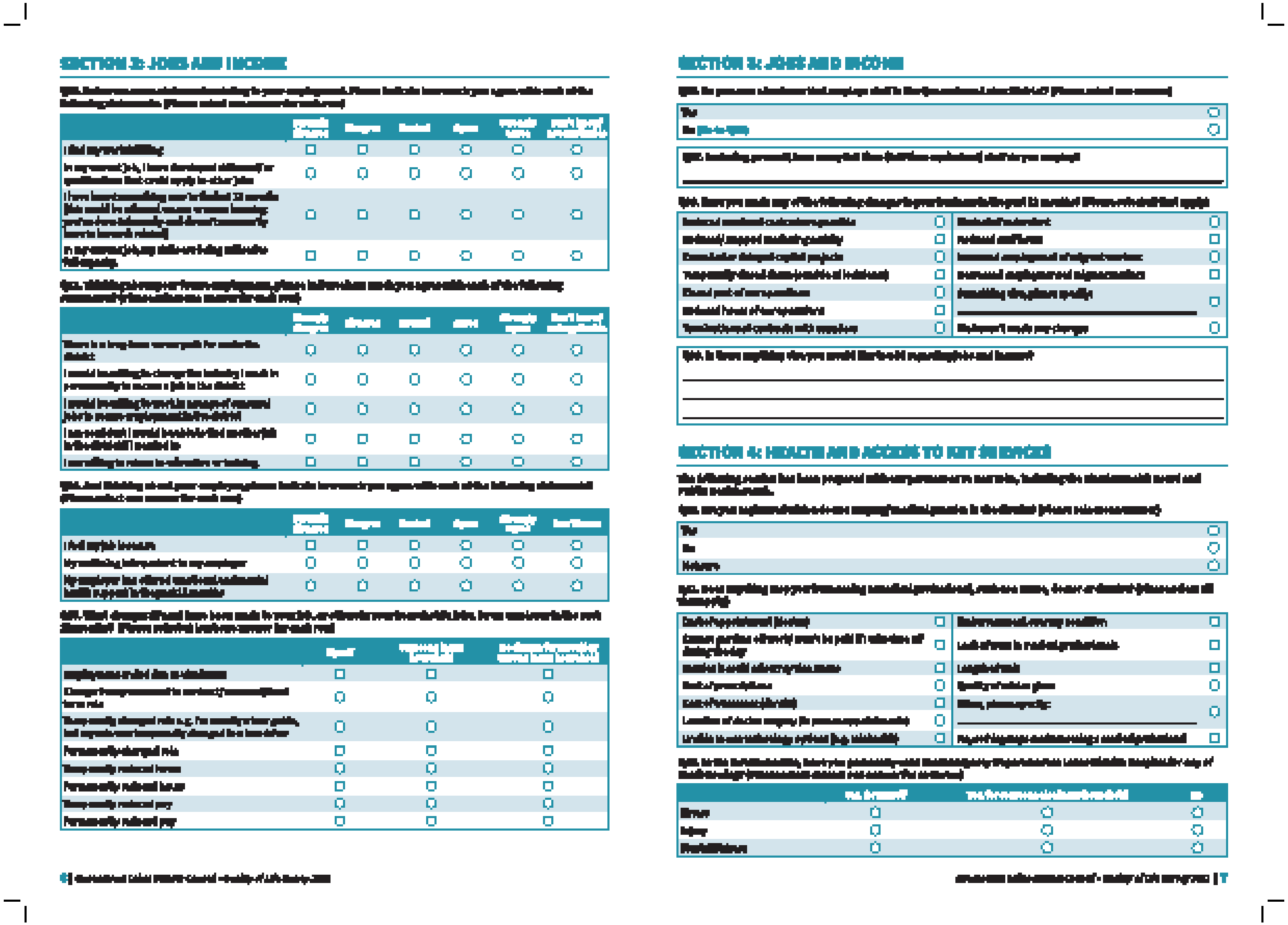
QUALITY OF LIFE SURVEY



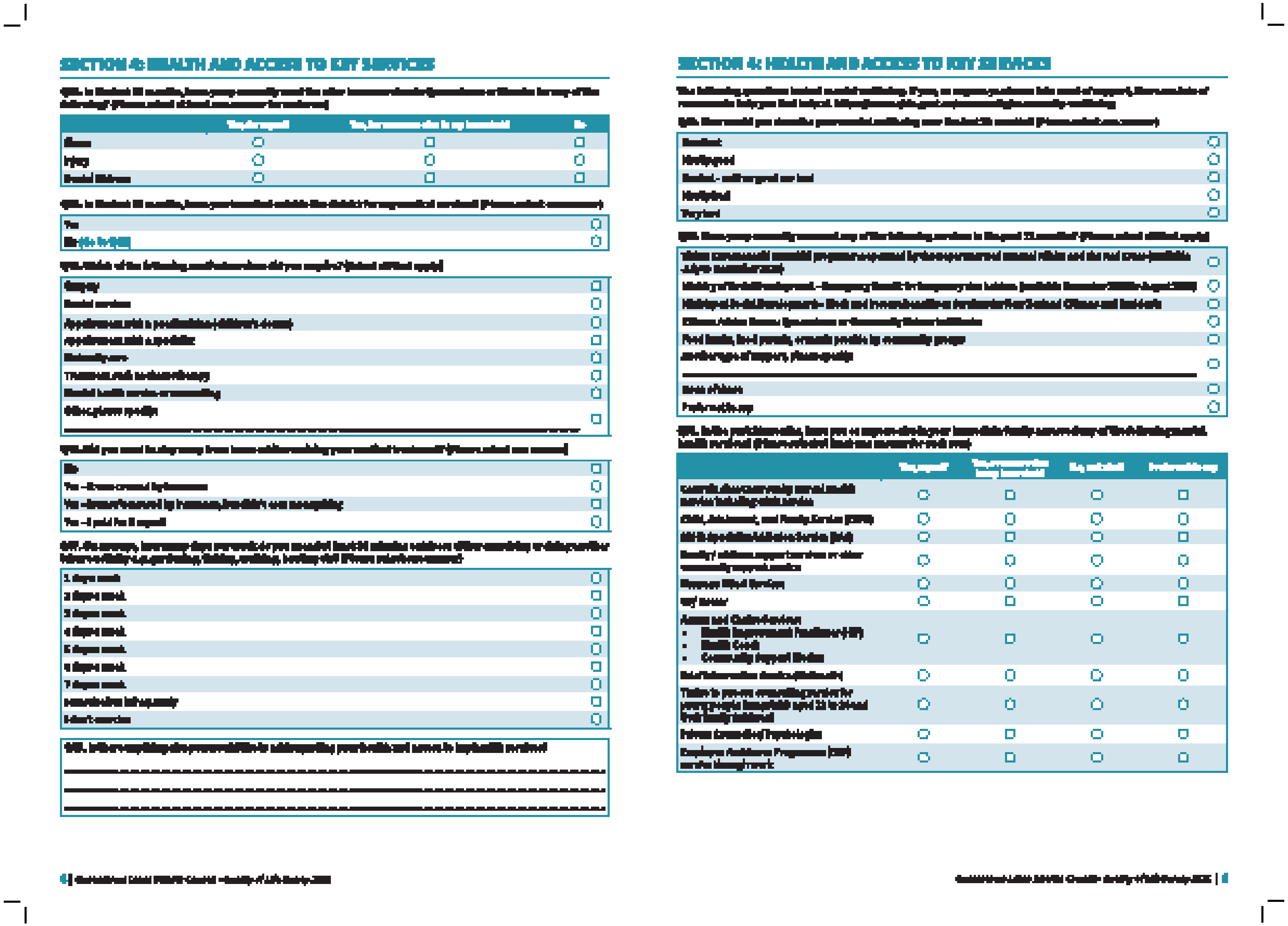
QUALITY OF LIFE SURVEY



QUALITY OF LIFE SURVEY

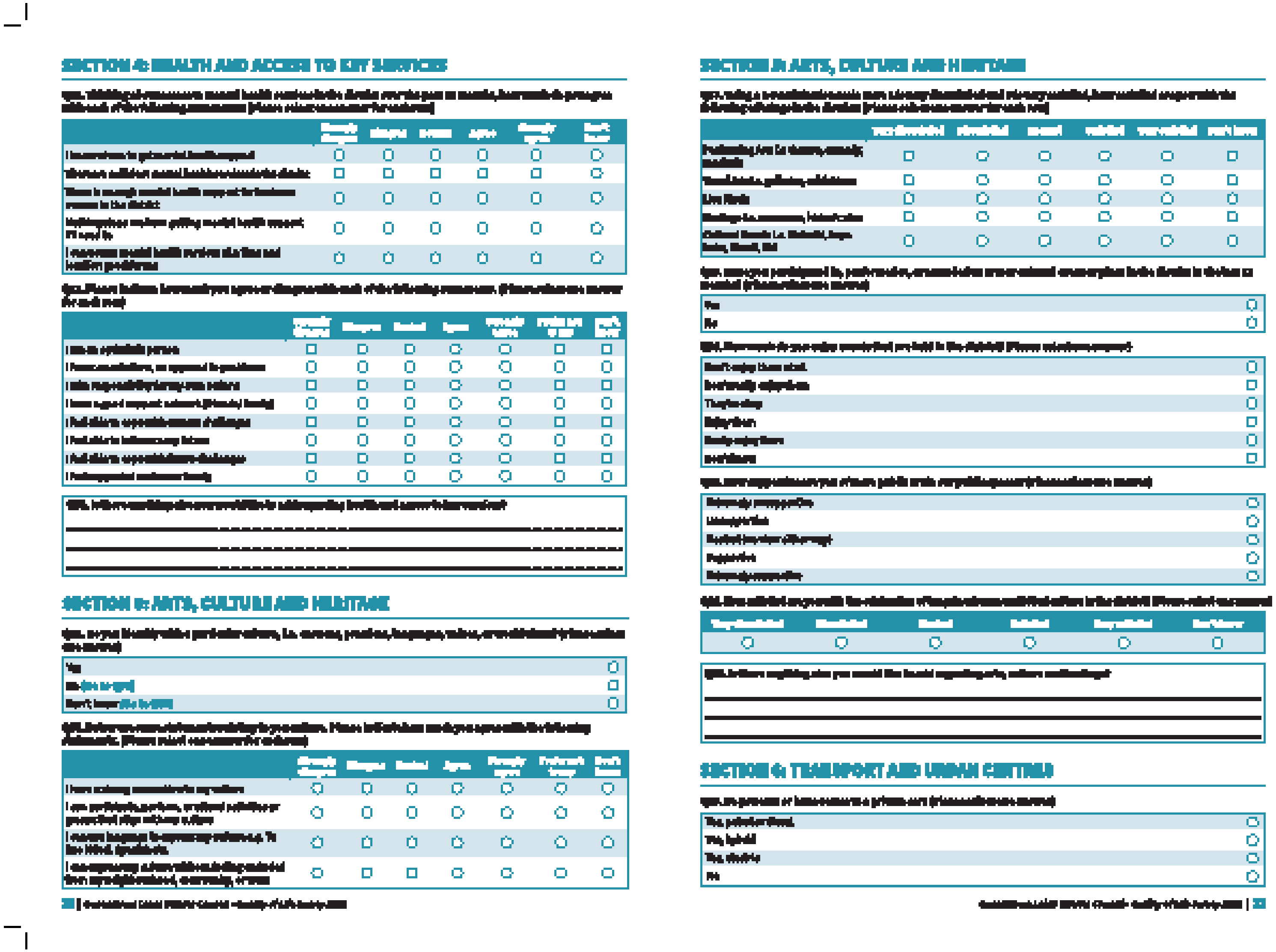


QUALITY OF LIFE SURVEY

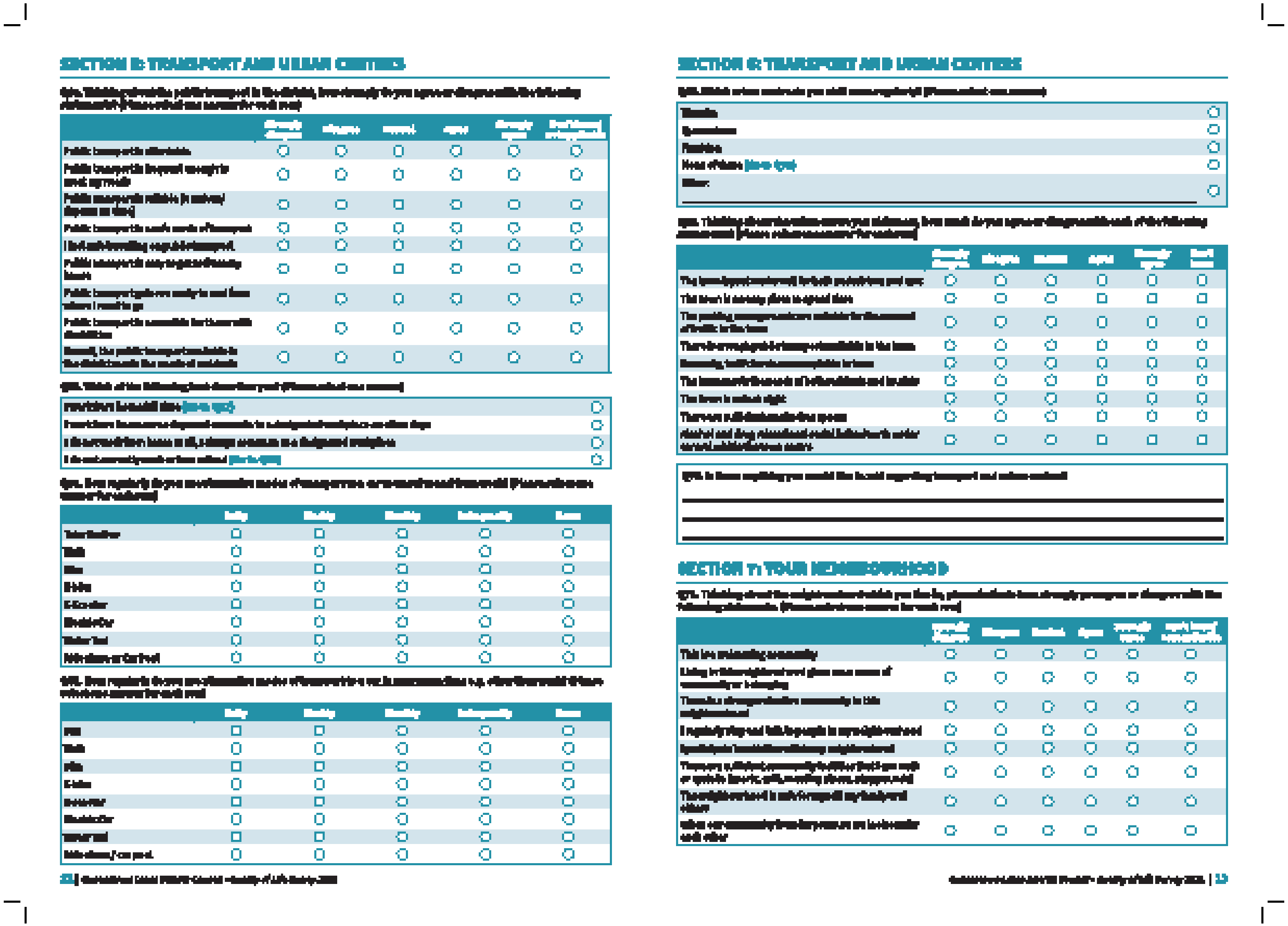

SECTION 4: HEALTH AND ACCESS TO KEY SERVICES

SECTION 4: HEALTH AND ACCESS TO KEY SERVICES

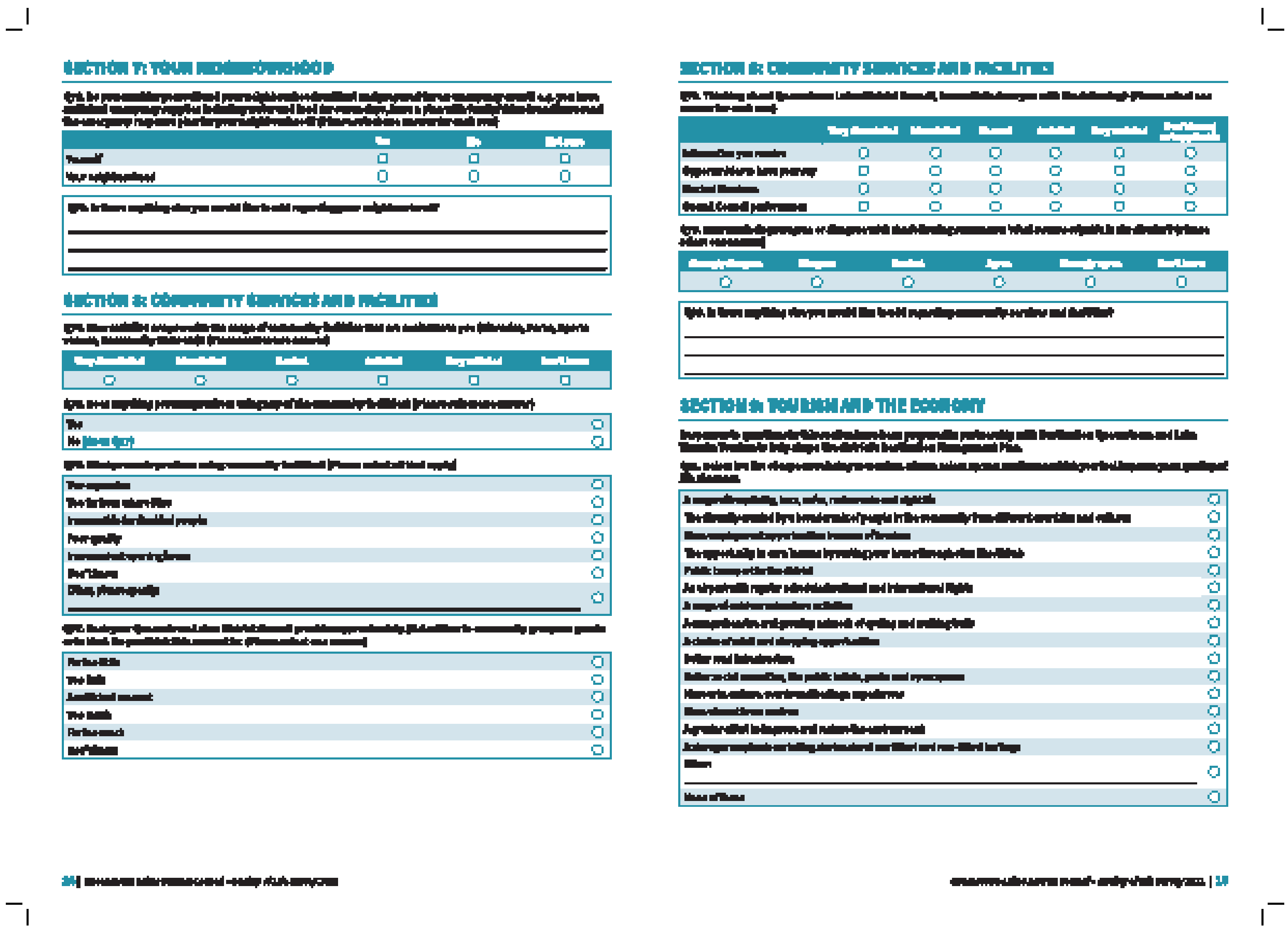
QUALITY OF LIFE SURVEY



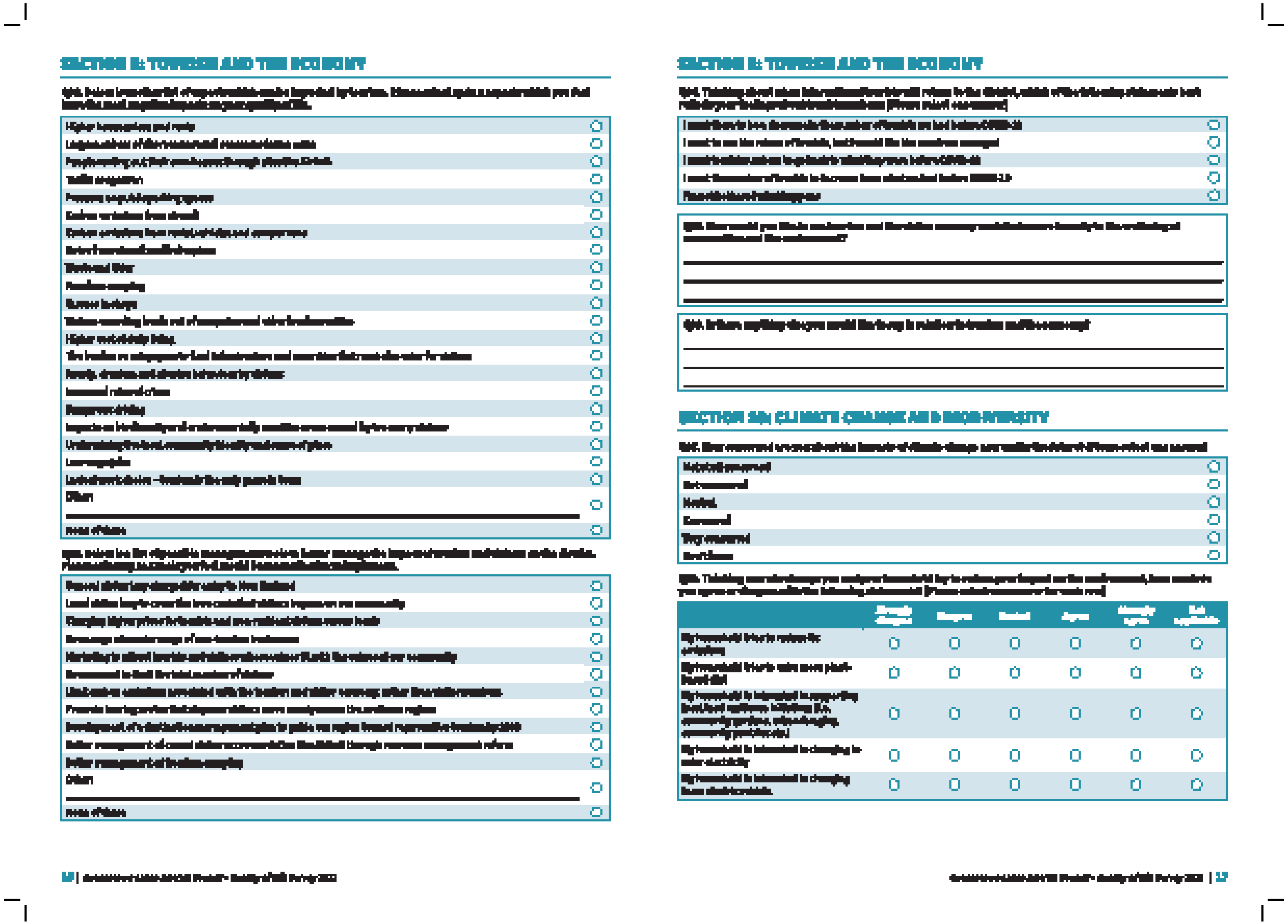
QUALITY OF LIFE SURVEY



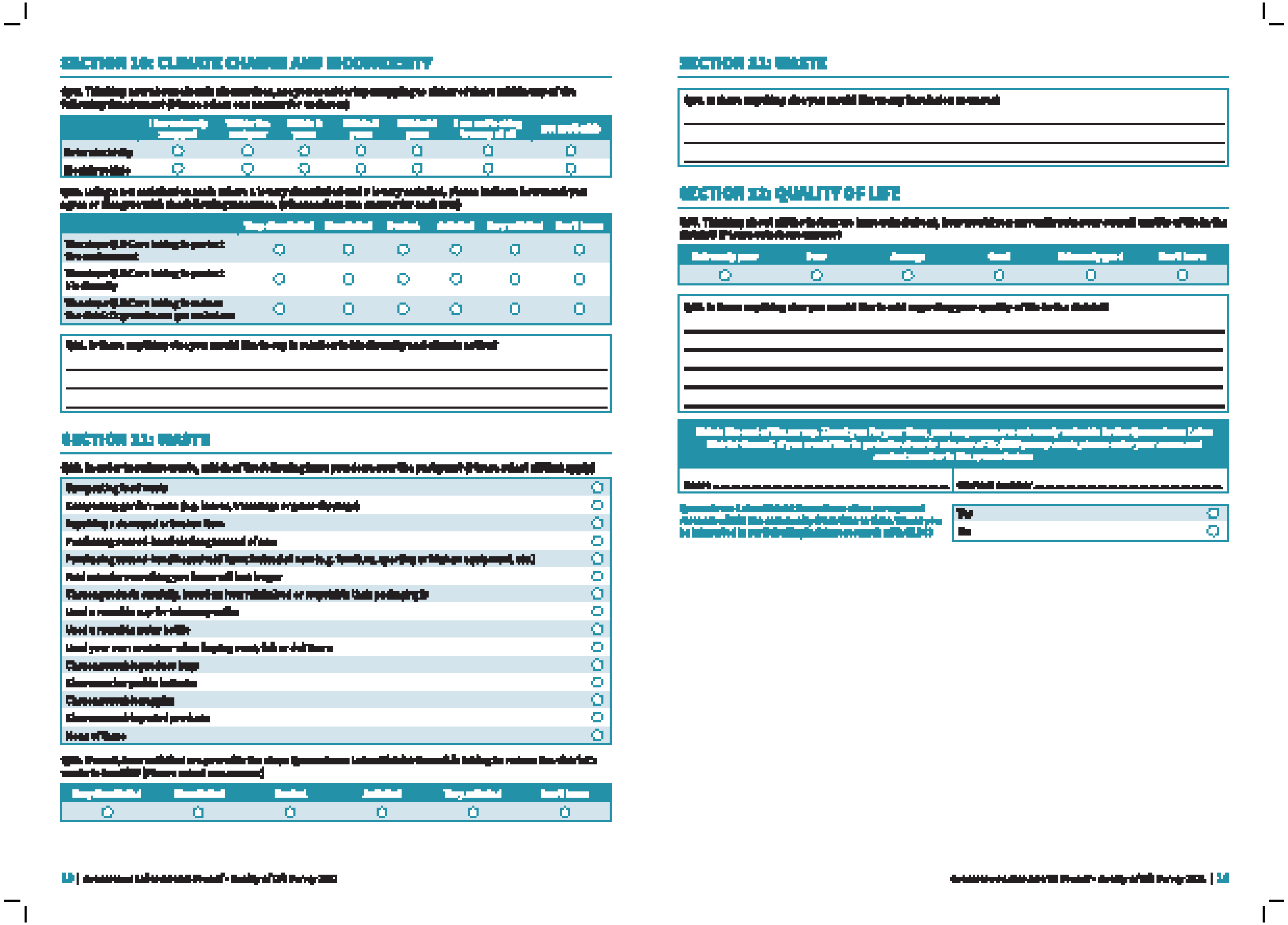
QUALITY OF LIFE SURVEY



QUALITY OF LIFE SURVEY



QUALITY OF LIFE SURVEY



YEARLY TRENDS

NEIGHBOURHOOD

	2019	2020	2021
Wanaka ward	32%	28%	28%
Lake Hayes Estate and Shotover Country	12%	17%	16%
Wakatipu Basin	14%	13%	13%
Queenstown	13%	10%	10%
Jacks Point and Kelvin Heights	7%	8%	9%
Frankton	8%	8%	8%
Arthurs Point	4%	5%	5%
Sunshine Bay-Fernhill	5%	4%	4%
Glenorchy	2%	2%	3%
Other	4%	5%	3%

YEARLY TRENDS

TOWN CENTRE CHARACTERISTICS: FRANKTON OVERALL AGREE

	2019	2020	2021
Safe at night	71%	61%	58%
Easy place to spend time	60%	58%	58%
Sufficient smokefree places	-	-	56%
Alcohol and drug related anti-social behaviour is under control	59%	48%	50%
Meets the needs of both residents and tourists	54%	46%	44%
Enough public transport is available	47%	40%	34%
Parking arrangements are suitable for the amount of traffic	49%	52%	33%
Traffic levels are acceptable	28%	34%	28%
Layout works well for pedestrians and cars	39%	43%	27%

YEARLY TRENDS

TOWN CENTRE CHARACTERISTICS: WANAKA OVERALL AGREE

	2018	2019	2020	2021
Easy place to spend time	65%	61%	71%	77%
Safe at night	-	80%	68%	65%
Sufficient smokefree places	-	-	-	58%
Traffic levels are acceptable	18%	35%	40%	51%
Meets the needs of both residents and tourists	-	31%	40%	49%
Layout works well for pedestrians and cars	26%	25%	42%	46%
Alcohol and drug related anti-social behaviour is under control	-	58%	44%	43%
Parking arrangements are suitable for the amount of traffic	12%	12%	28%	33%
Enough public transport available	6%	4%	5%	4%

YEARLY TRENDS

TOWN CENTRE CHARACTERISTICS: QUEENSTOWN OVERALL AGREE

	2018	2019	2020	2021
Easy place to spend time	53%	64%	72%	65%
Sufficient smokefree places	-	-	-	48%
Safe at night	-	55%	59%	48%
Enough public transport	47%	53%	57%	47%
Alcohol and drug related anti-social behaviour is under control	-	36%	38%	34%
Meets the needs of both residents and tourists	-	25%	27%	31%
Layout works well for pedestrians and cars	26%	25%	36%	24%
Traffic levels are acceptable	13%	17%	27%	21%
Parking arrangements are suitable for the amount of traffic	9%	12%	14%	7%

Versus
RESEARCH

Ph 07 856 7090 | versus.co.nz