Item 1: Long Term Plan Steering Group 6

SESSION TYPE: Workshop

PURPOSE/DESIRED OUTCOME:

This workshop will address development of key aspects of the Queenstown Lakes District Council (QLDC) Infrastructure Strategy, specifically its growth assumptions and options within QLDC's infrastructure investment areas which will directly inform the detailed capital expenditure programme.

The purpose of the discussion on growth is to:

- Enable understanding of the growth model and scenario projections that underpin the Long Term Plan (LTP).
- Enable understanding of the growth 'base case' that we have planned QLDC infrastructure investment options around.
- Seek direction from Councillors on whether they are comfortable with the approach to growth, or whether scenarios or the base case should be modified.

QLDC's infrastructure investment areas are:

- Asset management and renewals
- Climate adaptation and resilience
- Environment and natural infrastructure
- Waste minimisation and management
- Social infrastructure
- Transport

This workshop will address three of QLDC's infrastructure investment areas: Asset Management and Renewals, Climate Adaptation and Resilience, and Environment and Natural Infrastructure. Waste Minimisation and Management and Social infrastructure will be covered at the 9 July LTP Steering Group meeting, and Transport will be part of the 14 July full Council workshop.

The purpose of discussion on QLDC's infrastructure investment areas is to:

- Present options for how we could invest within each of the areas in terms of combinations of capital expenditure projects.
- Enable understanding of the options' high-level total cost and present a high-level indicator of whether it is driven by growth or levels of service. Note that estimated rates and development contribution impacts will be presented alongside the detailed capital expenditure programme.
- Seek direction from Councillors on a preferred scenario within each infrastructure investment area so that staff can model the detailed capital expenditure programme on that basis.

DATE/START TIME:

Tuesday, 30 June 2026 at 9:30am

TIME BREAKDOWN:

Presentation: 1.5 hours
Questions *or* Debate/Discussion: 1.5 hours

PRESENTERS:

Pennie Pearce - General Manager, Strategy and Policy
Jesse Taylor - Investment and Support Services Manager
Bill Nicoll - Resilience and Climate Action Manager
Anita Vanstone - Strategic Growth Manager
Alison Tomlinson - Strategic Asset Manager
Ian Dunbar - Organisation Performance Manager

Prepared by:

Name: Ian Dunbar
Title: Manager Organisation Performance
22 June 2026

Reviewed and Authorised by:

Name: Meaghan Miller
Title: Corporate Services General Manager
22 June 2026

ATTACHMENTS:

A	LTP Steering Group 6 PowerPoint Presentation
B	Supporting Briefing Note on Demand Projections
C	Attachment to the Briefing Note (Detailed Demand Projections)

Infrastructure Strategy

LTP Steering Group | 30 June 2026

QUEENSTOWN LAKES DISTRICT COUNCIL

Building the Infrastructure Strategy

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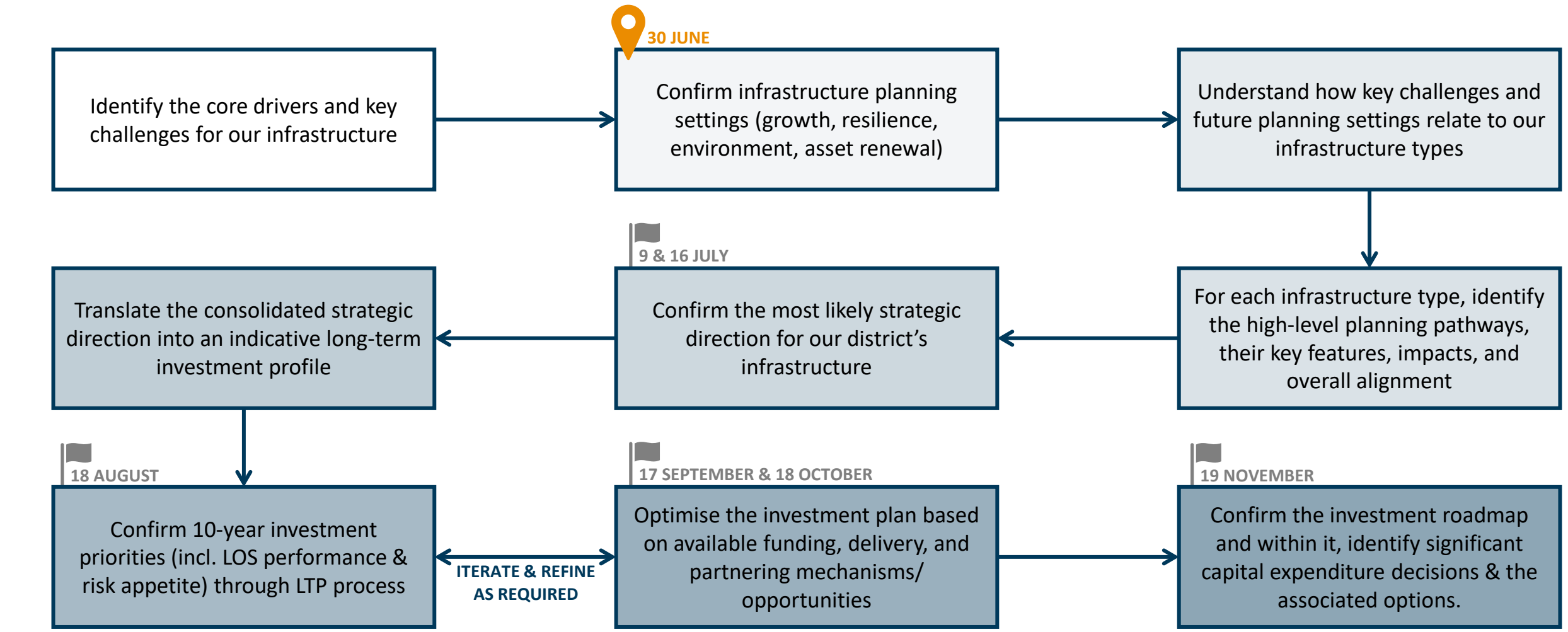

Focus of workshop

Options for cross-cutting planning settings are presented.
Council is asked to confirm the baseline settings for infrastructure planning.

INFRASTRUCTURE STRATEGY OUTLINE	
Context	Infrastructure in the district, Strategic Framework, Key infrastructure drivers Significant issues
30 Year Planning Settings	Cross-cutting planning settings: growth, resilience, te taiao, and asset renewal: • Potential options • Agreed combination of options (baseline planning setting)
30 Year Activity Planning Pathways	Infrastructure planning pathways: waste minimisation & management, transport, community/social, and natural/resilience-based: • Significant issues in context • Potential planning pathways • Agreed planning pathway
30 Year Investment Plan	Most likely future for our infrastructure: consolidated planning settings & pathways Planned approach to managing infrastructure – taking into account growth, levels of service, resilience, and environmental requirements 30-year investment road map: indicative capital and operating expenditure Significant capital decisions expected: when, what, potential cost, principal options

Consider options for each planning setting:

OPTION 2
Balanced approach

Renewal investment is prioritised toward high-criticality and high-consequence assets, while managing lower-risk assets through ongoing maintenance and condition monitoring to extend their useful life where appropriate.

	LOWER IMPACT ASSET CLASSES	MODERATE IMPACT ASSET CLASSES	HIGHER IMPACT ASSET CLASSES
Transport	Pathways Resilience Other (e.g. lines & signs)	Sealed Roads (rehabs) Street Lighting Traffic Services	Sealed Roads (resurfacing) Structures & Environmental Unsealed Roads
Waste	Public place bins	Minor Assets	Facilities
~30Y Capex	$20 - 30m	$100 - 140m	$220 - 300m
Opex Impact	●●● (some monitoring & reactive maintenance requirements)		

APPROACH & KEY FEATURES

This approach prioritises renewals based on criticality, consequence, and condition, with investment timing guided by asset performance and risk.

Lower-risk assets may have extended service lives, while programmes focus on those posing the greatest risk to service and resilience.

Selective improvements are delivered alongside renewals where they offer strong value.

CONSIDERATIONS

Delivery of this scenario relies on strong and consistent use of asset information to support risk-based decision-making.

It also requires clear agreement on acceptable levels of risk and service variability across different parts of the network.

Ongoing investment is maintenance and operational activities is needed to enable safe and efficient extension of asset service life.

EXPECTED OUTCOMES

Investment profile	Sustained and predictable capital expenditure over the long-term, with some increase in operational expenditure maintaining and monitoring lower-risk assets beyond traditional renewal points.
LOS impact	Current LOS are generally maintained in line with agreed priorities, with limited and managed variability in lower-priority asset categories where higher levels of risk are accepted.
Asset condition & risk	Critical and high-consequence assets remain protected and well-maintained, while a managed renewal backlog may develop within lower-risk asset groups where life extension remains an appropriate and monitored management response.
Long-term outcome	A resilient and affordable asset base focused on protecting critical services, supported by ongoing improvement in asset information and risk-based decision-making.

Compare options & confirm baseline setting:

Comparison of options

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EMPHASIS	HIGHER CONSEQUENCE/RISK	BALANCED APPROACH	LOWER CONSEQUENCE/RISK
30-year capital investment *Indicative costs for transport & waste only*	●● **$300-400M** Lower upfront expenditure	●●● **$350-460M** Prioritise critical assets, extend life of lower risk assets	●●●● **$450-580M** Greater upfront investment
Whole-of-life cost outcome	● High reactive & expensive treatments (high opex); costly replacements (high capex)	●●● Steady and balanced over time, small backlog may develop	●●●● Investment optimised (timing & treatment)
Level of Service performance & risk mitigation	●● Deterioration in LOS & increased failure risk	●●● Critical assets LOS steady, some risk	●●●●● LOS steady, risk minimised
Asset condition & backlog avoidance	●● Increased deterioration of asset base	●●● Maintain critical assets, allow for some low impact failures	●●●●● Retain/improve condition of all assets

Which option should be the baseline for future infrastructure planning?

Consolidate & incorporate into infrastructure activity planning

Refreshing the significant issues

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Significant issues have been updated to better reflect the infrastructure challenges and decisions facing the district today. While the existing issues remain important drivers, the updated issues focus more directly on their implications for infrastructure planning. This provides a stronger foundation for identifying strategic responses and long-term investment priorities.

THEME	EXISTING	UPDATED	SHIFT IN FOCUS
Growth management	Rapid and sustained population growth	Growth and demand outpacing capacity	Retains growth as a key driver, with greater emphasis on how combined population and visitor demand is exceeding infrastructure capacity and affecting service reliability.
Future service delivery	Increased and increasing standards and expectations	Misalignment between service models and future needs	Retains rising expectations and regulatory requirements, with increased focus on whether current service models remain fit-for-purpose in a changing environment.
System resilience	Resilience to shock events	Increasing exposure to disruption and limited system resilience	Retains focus on hazard resilience, with broader consideration of systemic disruption, interdependencies, and cascading impacts on critical services.
Environmental stewardship	Climate emergency	Infrastructure's impact on climate, biodiversity, and the natural environment	Retains climate change as a key driver, with expanded focus on wider environmental outcomes including biodiversity, resource use, and ecosystem health.
Investment need & affordability	Infrastructure deficit	Increasing affordability pressures and the need for trade-offs	Retains recognition of infrastructure funding gaps, with greater emphasis on affordability constraints and explicit investment trade-offs.

Our infrastructure planning settings

Potential settings for growth, resilience, environment, and asset renewal that define how we will plan for infrastructure over the next 30 years.

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Possible planning settings

We have identified four cross-cutting matters that underpin how we plan for and invest in our future infrastructure:
GROWTH, RESILIENCE, ENVIRONMENT, and ASSET RENEWALS

Applying common settings across infrastructure activities ensures each activity is planned using a consistent set of assumptions, supporting aligned decision-making and investment priorities across the infrastructure system.

Planning to Grow Well	Building Resilience	Thriving Te Taiao	Asset Stewardship
What growth profile and patterns form the basis of our infrastructure planning?	**What level of resilience are we targeting?**	**What are our environmental aspirations in relation to infrastructure?**	**What is our asset management philosophy?**

Together these settings establish the future planning context for our infrastructure.
This context is then applied to each of our infrastructure types.

Planning to Grow Well

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Legislation directs us to plan for growth

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Resource Management Act	National Policy Statement for Urban Development	Planning Bill	Local Government Act
Requires us to provide enough housing and business land for the district's projected demand, and to give effect to National Policy Statements	Explicitly directs us to: > enable growth > supply adequate housing and business land > enable adequate infrastructure to support development > produce housing and business capacity assessment and address any shortfalls	Has a much stronger emphasis on unlocking development capacity for housing and business growth, and enabling infrastructure delivery and urban growth. The enablement of growth is an explicit policy objective of the legislation.	Requires us to outline how we intend to manage our infrastructure assets, taking into account the need to respond to growth or decline in demand for services, over the next 30 years (s.101B Infrastructure Strategy)

Growth planning is not optional, its a mandatory requirement that is becoming more explicit in the new legislation (Planning Bill)

Growth in Queenstown Lakes

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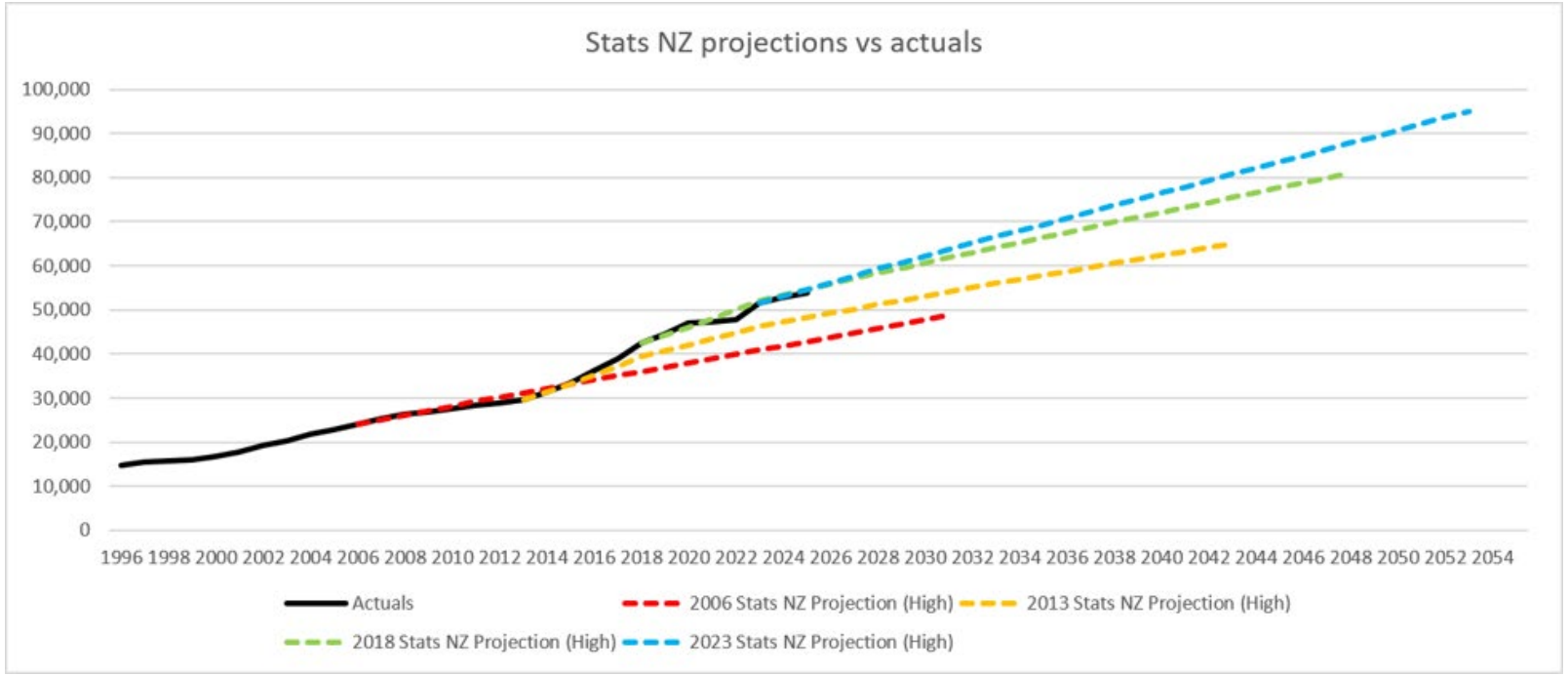
Queenstown Lakes District has been one of New Zealand's fastest-growing districts over the past 30 years.

Over the last 30 years:

- resident population has **increased by 39,000**
- average annual growth rate has been **4.6%**
- average annual population increase has been **1,350 people**
- growth rate has been **consistently understated** by Statistics NZ projections



Growth in Queenstown Lakes

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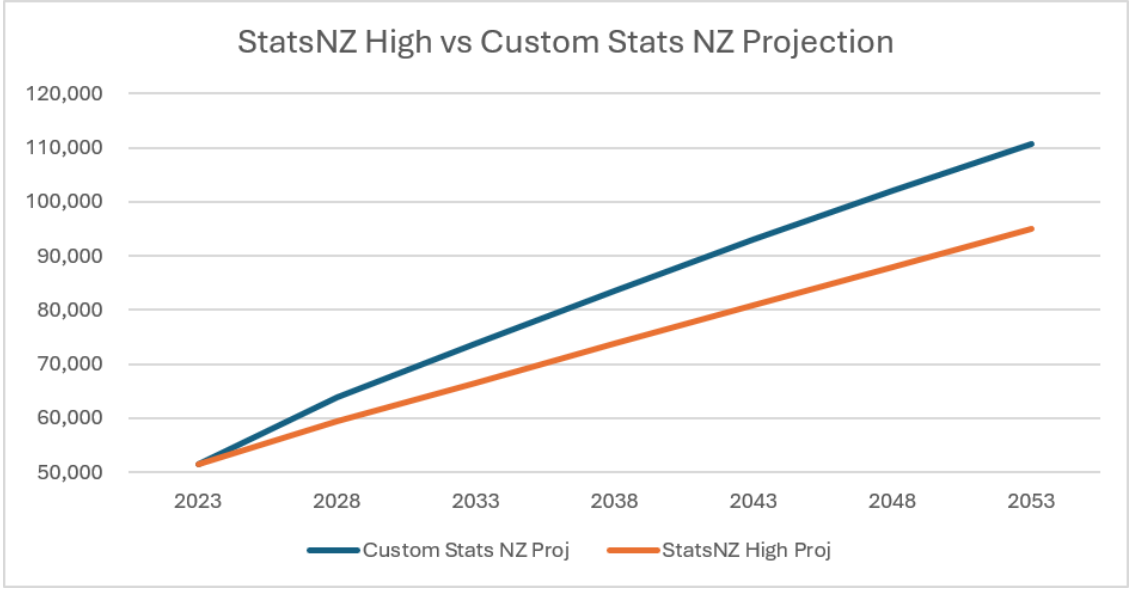
Past growth offers useful context, but projecting it in a straight line would overstate future numbers:

- At 4.6% a year, the population would near 206,050 by 2055
- That means around 5,075 people per year
- QLD has never sustained this level of annual growth
- Its record annual gain was 3,800 in 2023
- High percentage growth gets harder as the base expands
- Long term planning needs to reflect a more realistic path than the historic average



In response, QLDC requested customised high projections from Stats NZ. These assume net migration of:

- 10,000 people from 2024 to 2028 (equivalent to 4.4% growth rate)
- 8,000 people per five year period thereafter (equivalent to 3.1% growth rate)
- Average of 1970 people per year over the 30-year period, above the historic trend of 1,350 people

These customised projections have been used to update the QLDC Demand Projections, and form the base of the interim growth allocation and scenario model.

Monitoring Growth

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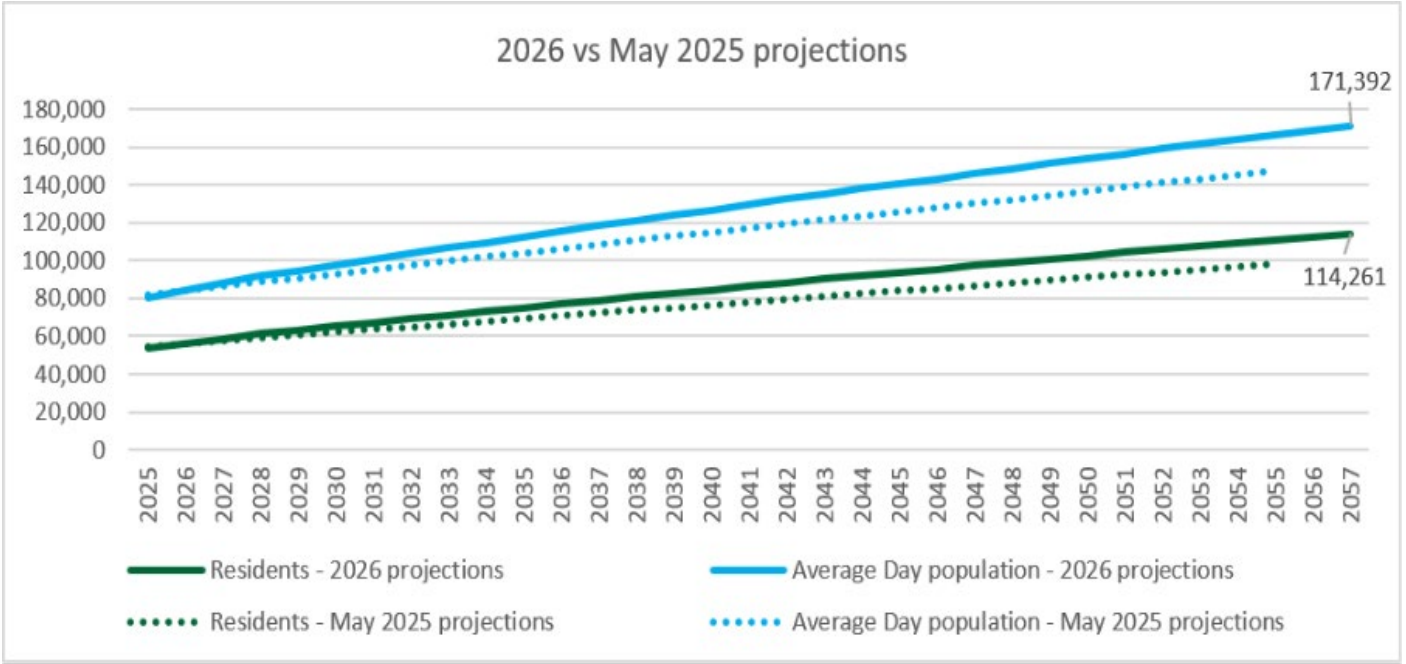
An interim growth and allocation model (the model) has been developed to test and compare different spatial allocation scenarios.

The model uses QLDC's May 2025 and May 2026 demand projections to define a long-term growth range, enabling growth to be monitored against multiple scenarios rather than a single pathway.



Growth will be monitored and demand projections will not need to be updated annually

- Key assumptions and actual growth monitored throughout the year
- Variations from assumed growth patterns identified (or not)
- Implications of any variations on infrastructure and financial planning assessed
- Revise timing, scale and prioritisation of investment based on observed trends

Using scenarios to test planning pathways

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- The interim growth and allocation model enables different growth assumptions to be tested and how this may affect infrastructure planning, land-use decisions and investment prioritisation.
- Allocates growth across 30 locations and brings together population households, employment, commercial activity and visitor accommodation.
- It allows Council to assess growth pressures more comprehensively, rather than relying only on resident population, household and visitor growth.
- **The Base case is the most aligned to the Spatial Plan and the community's expectations**. This is the scenario that will inform our planning. It has been informed by building / resource consent data, developer intentions, tourism data, updated capacity numbers, and is aligned to PDP and Spatial Plan.

Scenario	Type	Main basis	Key allocation feature	Best use
QLDC May 2026 Projections (Base)	**Default**	**Latest QLDC projections based on custom Stats NZ data**	**Demographic growth allocated across 30 model locations**	**Base case for planning and infrastructure**
Prioritising PDAs and Fast Track	Policy / developer	Scenario 1 adjusted by policy assumptions	Growth uplift in PDAs and inclusion of Fast Track consents	Test infrastructure implications of centre and dveveloper-led growth
2024/25 Consenting Data	Observed trend	Recent consenting activity and prior-year growth assumptions	Reflects actual recent development momentum	Compare short-term trends with long-term projections
QLDC May 2025 Projections	Comparison	Prior year projection set	Same broad method using earlier data	Year-on-year comparison and sensitivity testing

Councillors are being asked to provide input on whether or not there are any other scenarios that should be considered. The scenarios are being discussed in detail on the following slides.

SCENARIO 1
Base Case

We use the most recent demographic projections and distribute 30-year growth across the district according to development trends, consent data, developer intentions, and available capacity.

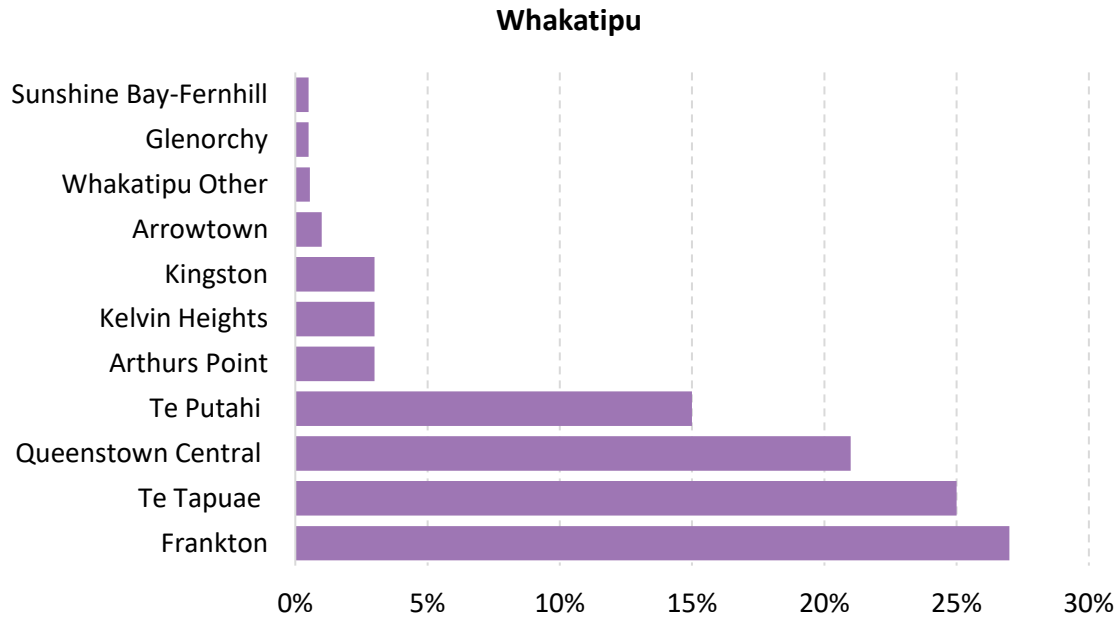
SCENARIO DESCRIPTION

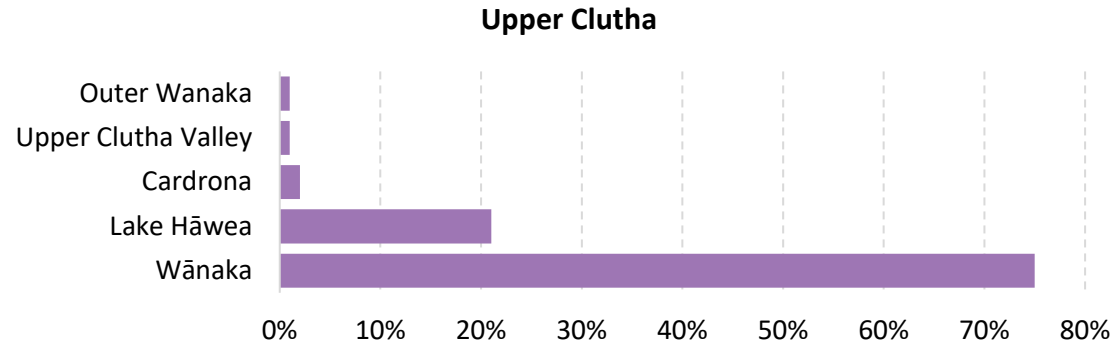
This scenario is informed by historic building and resource consent data, as well as current developer intentions and the latest planning and infrastructure capacity data – the scenario assumes low to moderate intensification in established areas with most new growth occurring in greenfield areas.

This scenario is most aligned to the Spatial Plan and the communities' expectations.

EXPECTED OUTCOMES

Growth pattern	Growth is taking place across the district with stronger growth taking place in the priority development areas.
Infrastructure servicing	Infrastructure planning reflects sequencing assumptions, with some investment needed to be brought forward. Growth servicing demands need to be met across the district in equal priority. Developers will need to deliver some of the infrastructure.
Investment influence	Investment requirements remain broadly similar in scale, but a shift in timing and location compared to the 24 LTP. This includes bringing forward investment in Te Putahi and Te Tapuae. Significant investment across the network is required, particularly the transport network.
Long-term trajectory	The district follows a broadly similar growth pathway, with differences reflecting updated demographics, demand, capacity and developer intentions within PDAs or future urban areas.





SCENARIO 2
Priority Development Areas and Fast Track

Growth modelling is influenced by policy direction and accelerated consenting activity, with a stronger focus on Priority Development Areas and Fast Track developments.

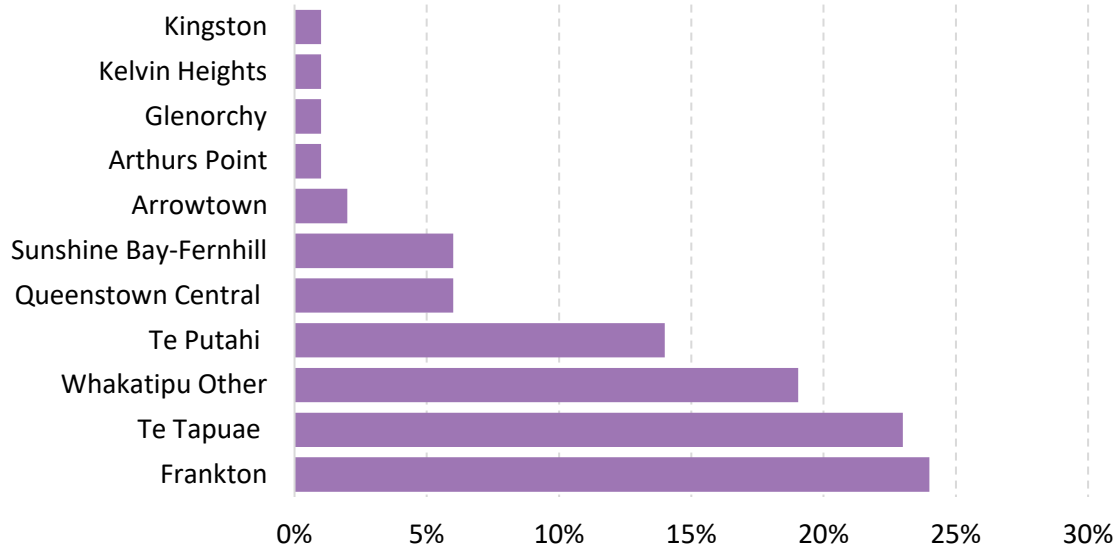
SCENARIO DESCRIPTION

This scenario models accelerated growth in Priority Development Areas (PDAs) and fast-track approvals, with growth allocated based on known capacity and developer intentions. In Whakatipu, growth remains strong in PDAs, with Outer Whakatipu and Sunshine Bay-Fernhill increasing significantly due to fast-track consents. In Upper Clutha, growth is concentrated in Wānaka and Lake Hāwea. Overall, growth becomes more dispersed across Whakatipu while remaining concentrated in Upper Clutha. Growth is driven primarily by greenfield development, with limited intensification in PDAs.

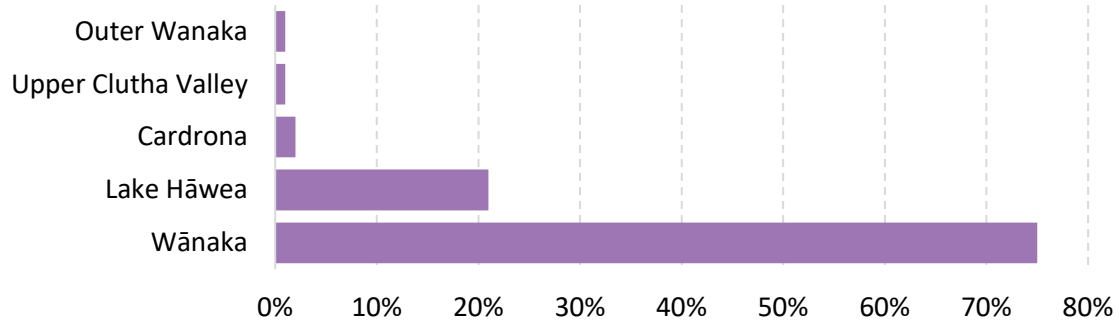
EXPECTED OUTCOMES

Growth pattern	Growth becomes more concentrated in PDAs, and dispersed as it responds to out-of-sequence and unanticipated growth via the fast-track consenting process.
Infrastructure servicing	Infrastructure would need to be delivered earlier and more strategically to enable PDAs and fast-tracks, with less focus on smaller settlements. Fast-track approvals may increase opportunities for developer-led delivery and require significant transport investment beyond current plans.
Investment influence	Investment becomes more concentrated and forward-loaded into specific locations, increasing pressure to fund and deliver infrastructure earlier and be more agile to change. Developers likely to deliver 3W infrastructure for all developments outside urban areas. Investment in settlements is delayed.
Long-term trajectory	The district develops with stronger spatial concentration in PDAs and disperses growth into unanticipated areas.

Whakatipu



Upper Clutha



SCENARIO 3
2024/25 Consenting Data

We model growth that reflects recent development activity in the district based on 2024/25 consenting patterns. This approach represents a market-driven view of growth, translating actual growth into a continuation of trends over the longer term.

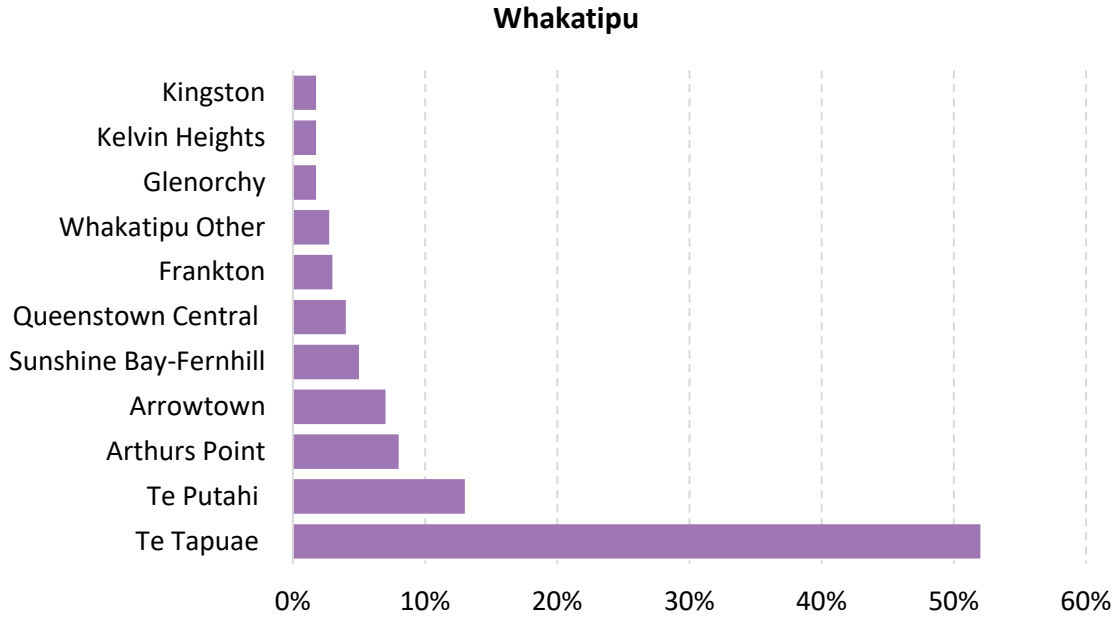
SCENARIO DESCRIPTION

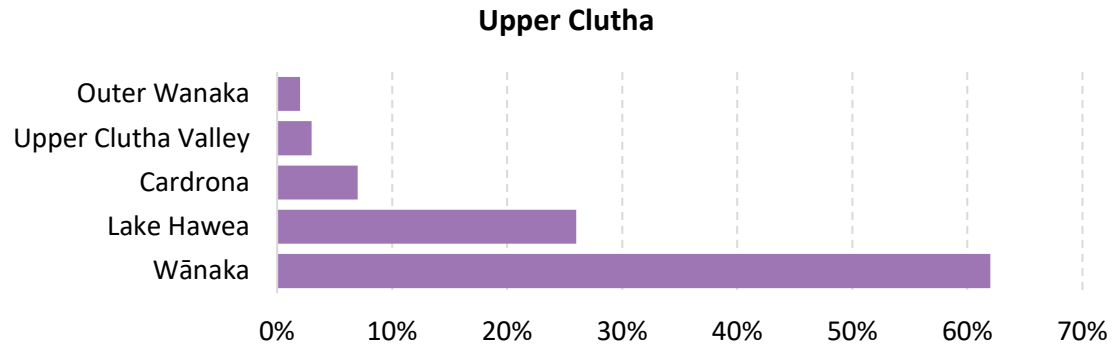
Drawing on 2024/25 building consent and construction data, this scenario produces a markedly different pattern. In Whakatipu, Te Tapuae captures a dominant share, over double the other scenarios, while established centres such as Te Kirikiri Frankton and Queenstown Central get far less, reflecting recent concentration in the Te Tapuae corridor.

In Upper Clutha, Lake Hāwea takes a notably higher share than in other scenarios, mirroring recent consenting there, while Wānaka takes less.

EXPECTED OUTCOMES

Growth pattern	Growth becomes more uneven, with stronger concentration in areas of recent development activity. New and emerging development areas are not prioritised.
Infrastructure servicing	Infrastructure provision becomes more reactive, responding to where development has occurred rather than long-term planned sequencing.
Investment influence	Investment becomes more uneven and limited to particular areas, with funding increasingly influenced by short-term development activity.
Long-term trajectory	The district evolves in a more market-responsive pattern, with greater uncertainty in long-term spatial form, or competition in the market.





SCENARIO 4
2025 QLDC Growth Projections

We use the May 2025 demand projections to provide a year-on-year comparison of growth distribution. It provides a baseline view of expected growth and enables changes in projection assumptions and spatial allocation to be tracked over time.

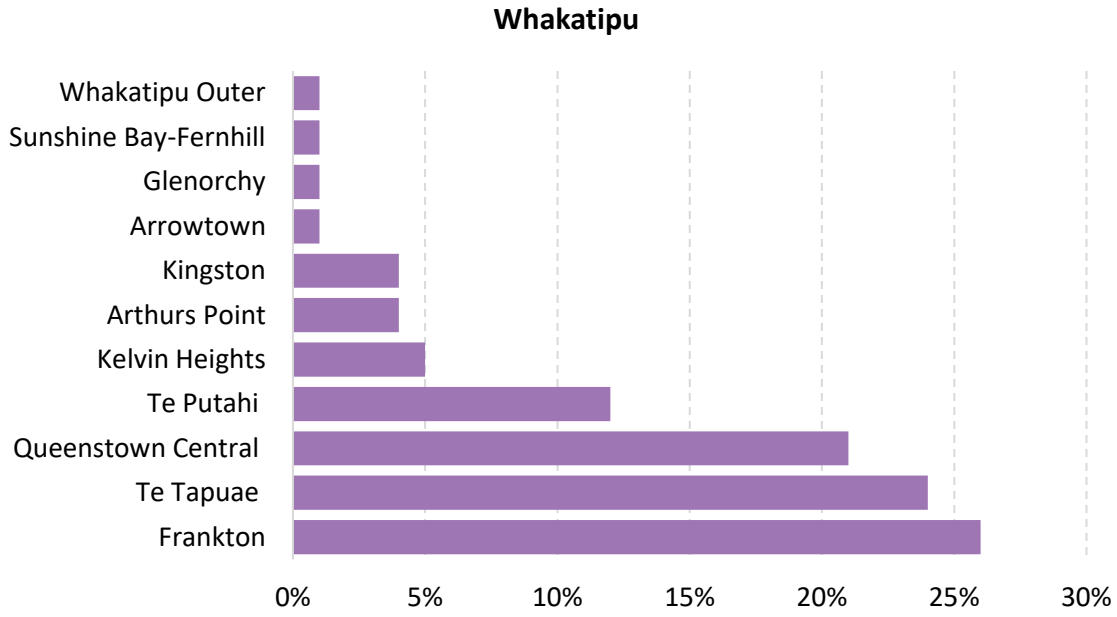
SCENARIO DESCRIPTION

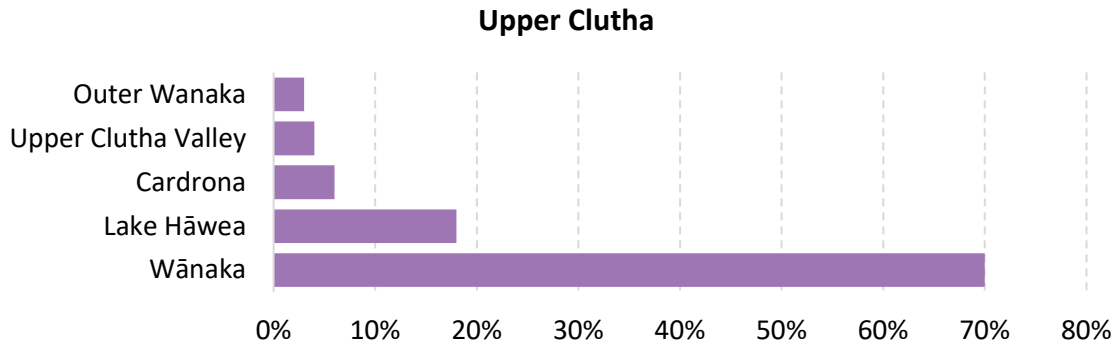
This scenario is informed by historic building and resource consent data, as well as current developer intentions and the latest planning and infrastructure capacity data – the scenario assumes low to moderate intensification in established areas with most new growth occurring in greenfield areas. This scenario adopts a more conservative growth approach.

It is aligned with the Stats NZ high scenario and will be used as the lower bound for long term growth monitoring.

EXPECTED OUTCOMES

Growth pattern	Growth follows similar spatial patterns to Scenario 1, but with slower growth rates in the priority growth areas.
Infrastructure servicing	Infrastructure planning reflects earlier sequencing assumptions, with some variations. Growth servicing demands need to be met across the district in equal priority.
Investment influence	Investment requirements remain broadly similar in scale but shift in timing and location compared to the 2024 LTP. Significant investment across the entire network is needed.
Long-term trajectory	The district follows a broadly similar growth pathway, with differences reflecting updated demographic understanding.





Comparison of scenarios

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	BASE	PDA + FAST TRACK	24/25 CONSENT DATA	2025 PROJECTIONS
General	Aligns with historic growth patterns & anticipated demand, spreads growth across district but does not address unanticipated growth	Considers priority development area growth & reacts to fast track consents, but does not address growth in settlements	Growth follows recent trends, does not address new & emerging areas or unanticipated growth	Similar to 2026 projection, but shows growth at a slightly lower rate. This growth rate is considered conservative.
Infrastructure	Growth servicing demands need to be met across the district in equal priority.	Requires earlier infrastructure investment, greater developer-led delivery, and significant transport network upgrades.	Infrastructure provision becomes more reactive, responding to where development has occurred rather than long-term planned sequencing.	Growth servicing demands need to be met across the district in equal priority, but at a slower rate to the 2026 Projections.
Investment	Overall investment remains similar to the 2024 LTP but shifts earlier and towards Te Pūtahi and Te Tapuae. Significant network-wide investment is still required.	Investment is concentrated in priority locations, requiring earlier infrastructure delivery and greater flexibility, while investment in settlements is deprioritised.	Investment becomes more uneven and reactive, with funding increasingly influenced by short-term development activity.	Investment requirements remain broadly similar in scale but shift in timing and location compared to the 2024 LTP. Significant investment across the entire network is needed.
Long term	The district follows a broadly similar growth pathway, with differences reflecting updated demographics, consent data and developer intentions.	The district develops with stronger spatial concentration in PDAs and disperses growth into unanticipated areas.	The district evolves in a more market-responsive pattern, with greater uncertainty in long-term spatial form.	The district follows a broadly similar growth pathway, with differences reflecting updated demographic understanding.

Building resilience to natural hazards and the effects of climate change

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Overview

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Queenstown Lakes District is already experiencing the impacts of a changing climate and natural hazard emergencies. These pressures are increasing the complexity and cost of infrastructure planning, emergency response and service delivery, while also shaping community resilience, insurance, affordability and future investment decisions.

Many infrastructure assets have long lives and must continue performing under future conditions that may differ significantly from the present. Roads, bridges, retaining walls, jetties, wharves, parks, community facilities, waste facilities, properties, emergency facilities and critical access corridors all need to be planned and managed with this future uncertainty in mind.

Climate Projection Pathways

To help plan for this future uncertainty, QLDC has developed three local climate projection pathways for the district. These pathways are based on international Shared Socioeconomic Pathways (SSP) datasets and will help Council understand how infrastructure risks may change over time, where current assumptions may no longer be adequate, and which decisions should be staged, monitored or revisited as conditions change.

Acting now for our Mokopuna
SSP1-2.6

Early, coordinated transition with earlier resilience investment, lower disruption and more preserved options.

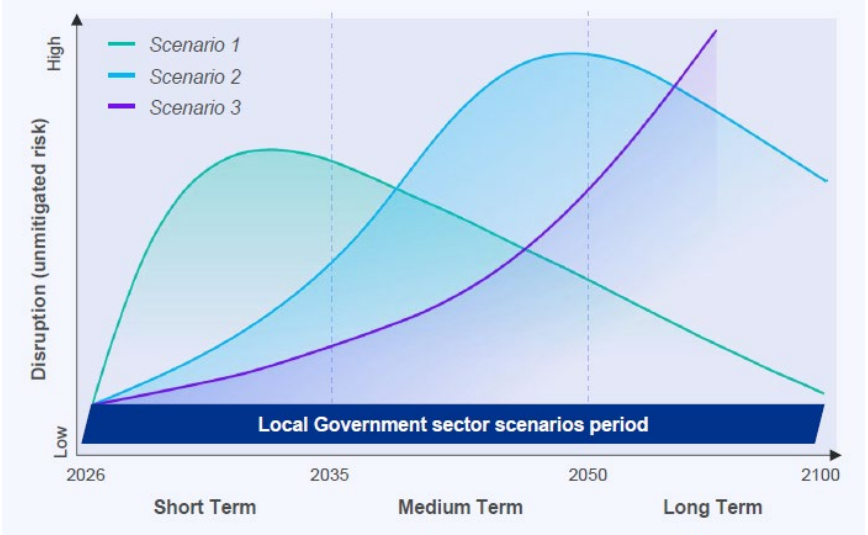
Leaving it to the next generation
SSP2-4.5

Delayed action followed by a rushed and more costly transition. The same hazards create greater disruption.

Inheriting a broken world
SSP3-7.0

Weak action, worsening physical risk, lower institutional capacity and more severe long-term disruption.

The pathways are not predictions. They provide a structured way to test how infrastructure risks may change under different climate futures, and to identify which decisions should be made now, monitored, staged or revisited as conditions change. The data shows that, across all pathways, the district is expected to become warmer, experience more hot days and fewer frost days, and face more intense heavy rainfall. Under higher warming pathways these changes are much more significant reinforcing the need for Council to use climate projections to guide the timing, scale and sequencing of early resilience interventions. This dynamic adaptative planning approach will support the risk management of seismic natural hazards as well.



Potential climate change projections for 2081-2100*

Temperature Range	Heavy Rainfall Range	Hot days Range	Frost days Range
+0.8 to +2.9°C	**+3.8% to +16.0%**	**+2 to +15 days/yr**	**−14 to −50 days/yr**
mean change	99th percentile rainfall	additional days above 25°C	fewer frost days

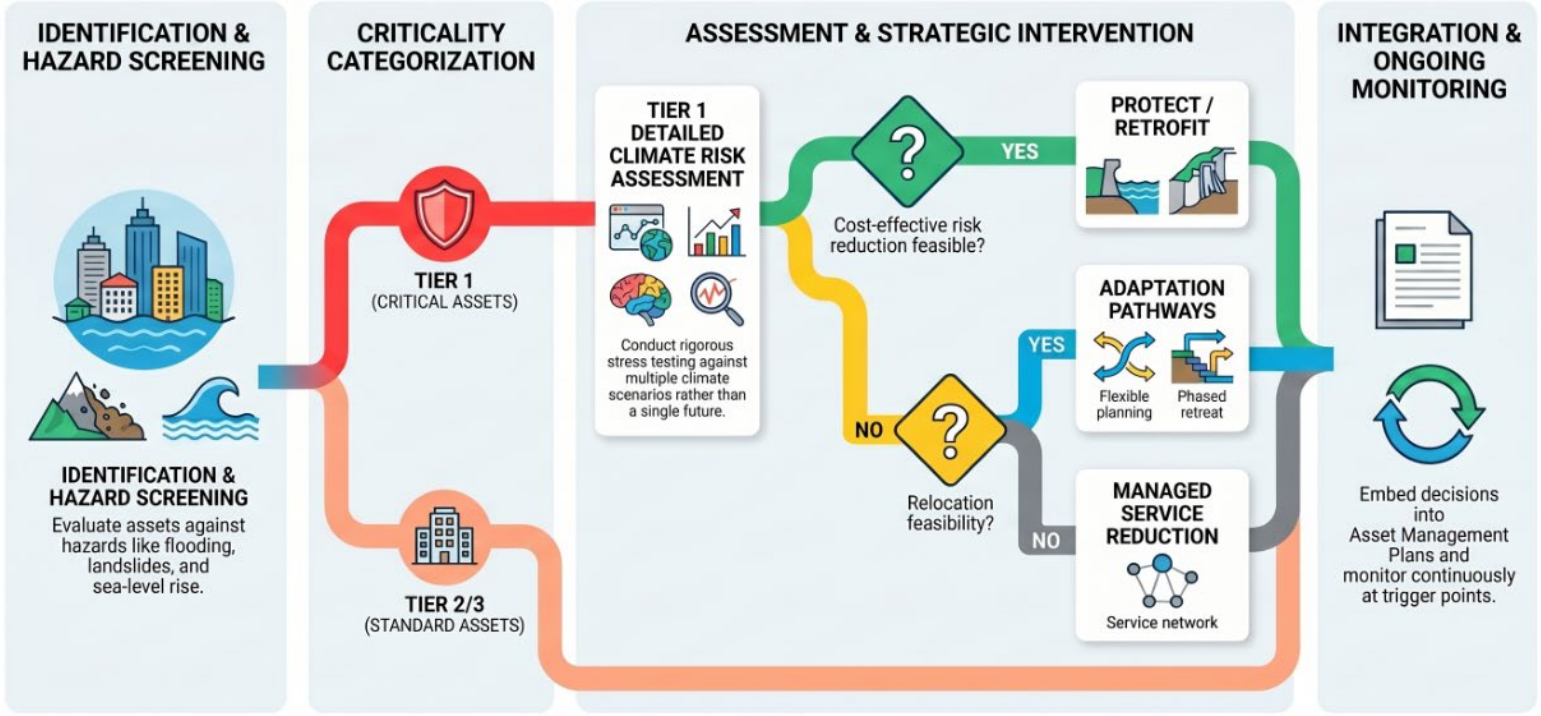
*Comparison against a 1995-2014 baseline. Low estimate is for SSP1-2 pathway. High estimate is for SSP3-7.0.

Overview

The climate projection pathways show the range of futures QLDC needs to be ready for. The next step is to adopt an asset level decision framework that translates this future uncertainty into practical decisions about where, when and how Council invests in resilience. Council cannot protect everything, so it needs to be clear about which assets and services matter most, what level of disruption is tolerable, and whether to protect, retrofit, relocate or decrease the level of service to the community.

The proposed framework will screen assets and services against the hazards they are exposed to, and then test them against multiple climate pathways rather than a single forecast. The framework supports a *Dynamic Adaptive Pathways Planning* (DAPP) approach. Rather than committing now to one fixed solution, Council can identify trigger points, monitor changing risk and sequence decisions over time.

An asset-level decision framework for managing uncertainty



Our resilience options

On the following pages are the building resilience options. These show how Council could apply this decision framework at different levels of ambition, from responding through existing renewals, to targeting critical risks, to accelerating adaptation across the asset base.

Each option reflects a different balance between cost, risk, timing, service continuity and preparedness for worsening climate and natural hazard conditions.

The key choice is how much risk Council is prepared to carry, how much disruption is tolerable, and how early it wants to invest to protect critical assets, maintain service continuity and preserve future adaptation options.

Councillors are asked to provide direction as to which option should be assumed as we build the 30 year programme for specific activity areas

OPTION 1
Reactive and affordability-led resilience

We continue to deliver renewals and maintenance within existing programmes, with resilience improvements occurring opportunistically or in response to major events.

	Short-term (Y1-3)	Medium-term (Y4-10)	Long-term (Y11+)
Focus	Existing reactive and renewal- based resilience approach continues.	Increasing exposure managed through response and recovery systems.	Ongoing reliance on reactive adaptation and renewal cycles.
Key investments & actions	• **Renewals:** Existing renewals and maintenance • **Safety/environmental:** baseline investment in rockfall scoping & mitigation, seismic strengthening minor works, wildfire mitigation, priority dangerous trees & urgent safety works • **Waterways:** Flood protection design works, Waterways AMP • **EOC:** Minor investment in equipment & storage • **Energy**: partnered investment where possible	• **Waterways:** Storm damage repairs & reinstatement, condition-led flood protection& lakefront renewals • **Bridges/ retaining walls:** Condition-led bridge & retaining wall renewals • **Waste:** Transfer station resilience upgrades • **Energy**: Targeted energy investments • **Community:** Targeted community facility renewals	*Monitor the following trigger metrics…* • Renewal adaptation as assets reach end of life • Event driven repairs • Bridge & access upgrades only where renewal due • Service level change for repeatedly damaged assets • Relocation or retirement where risk becomes unaffordable
~30Y Capex	**$25 – 40m**	**$50 – 90m**	**$70 – 140m**
Opex Impact	●●●	●●●●	●●●●●

APPROACH & KEY FEATURES

This approach delivers resilience improvements mainly through existing renewal, maintenance and response processes, with only limited proactive adaptation investment. It prioritises low-cost upgrades where they already align with planned works, relies on emergency response and recovery funding after events, and uses climate projections primarily to inform awareness, preparedness and contingency planning.

CONSIDERATIONS

This approach may reduce near-term costs but accepts higher residual risk across exposed assets and services.

It is most appropriate for lower-criticality assets where disruption is tolerable, but less suitable for critical corridors, essential services, or high-consequence assets.

EXPECTED OUTCOMES

Service continuity	Service disruption becomes more frequent in exposed areas, with resilience largely dependent on response and recovery capability.
Asset resilience	Assets are progressively exposed to increasing climate and hazard risk, within limited proactive adaptation.
Investment influence	Resilience considerations applied inconsistently and typically late in project development, limiting influence on investment decisions.
System performance	Resilience outcomes are uneven across the network, with higher residual risk carried over time.

OPTION 2
Targeted resilience for critical assets and corridors

We focus resilience investment on critical assets, corridors, and services where failure would have the highest consequence. A structured risk-based approach is used to assess exposure, interdependencies, and service criticality.

	Short-term (Y1-3)	Medium-term (Y4-10)	Long-term (Y11+)
Focus	Critical assets and corridors (tier 1) identified and prioritised for climate risk assessment and targeted investment	Structured adaptation investment planning for Tier 1 & 2 assets and corridors	Embedded risk-based adaptation planning for all infrastructure systems
Key investments & actions	• **System:** Hazard and climate screening of high value capital projects • **Renewals:** Increased renewals and maintenance • **Safety/ Environmental:** targeted investment in seismic strengthening, wildfire mitigation programme, rockfall, slope stabilisation, dangerous trees • **Bridges:** Arthurs Point Bridge • **Flood and waterways:** Flood protection physical works • **EOC**: Dual use Emergency Operations Centre • **Energy**: Batteries, Solar, EV chargers, BMS in key sites	• **Waterways**: District-wide waterways renewals, Waterways AMP • **Bridges/ retaining walls:** Structures components & bridge upgrades, retaining walls • **Community:** Critical community facilities (community emergency hubs) • **Infrastructure:** Wanaka Airport & Glenorchy Airstrip • **Waste:** Transfer station resilience upgrades	*Monitor the following trigger metrics…* • Adaptive corridor redundancy programme • Long-term bridge & alternate access • Lakefronts, wharves, jetties, reserves • Natural infrastructure expansion • Long-term aviation lifeline resilience • Relocate, retire, change services as required
~30Y Capex	**$120 – 180m**	**$140 – 240m**	**$180 – 350m**
Opex Impact	●●●●	●●●●	●●●●●

APPROACH & KEY FEATURES

This approach focuses resilience investment on assets and corridors most critical to safety, access, and essential services. It sets disruption thresholds, maps risks and interdependencies, and stress-tests key assets using climate-informed assumptions. Adaptive triggers guide protect, accommodate, or retreat decisions, with risks tracked through plans, registers, and dashboards to ensure timely action.

CONSIDERATIONS

This approach requires stronger asset information, hazard data, climate interpretation capability, and clear governance of risk tolerance.

It also requires explicit prioritisation of critical assets and acceptance of residual risk in lower priority parts of the network.

EXPECTED OUTCOMES

Service continuity	Critical services and corridors are better protected, while lower priority areas retain higher residual vulnerability.
Asset resilience	Resilience investment is concentrated where consequences are highest, improving performance of key assets.
Investment influence	Resilience considerations are embedded in major projects and critical asset decisions through structured risk-based assessment.
System performance	Overall resilience improves in a targeted way, but system-wide risk visibility remains partial.

OPTION 3
Accelerated resilience uplift

We accelerate resilience investment across a broader range of assets to reduce exposure earlier, strengthen redundancy, and improve system robustness under future climate and hazard conditions.

	Short-term (Y1-3)	Medium-term (Y4-10)	Long-term (Y11+)
Focus	Critical assets (tier 1) and some standard assets (tier 2) prioritised for accelerated resilience investment	Broader rollout of resilience upgrades and redundancy investment	System-wide resilience uplift embedded across major asset networks
Key investments & actions	• **System:** Hazard and climate screening of all capital programme. • **Renewals:** comprehensive investment programs. • **Safety/environmental:** comprehensive investment in wildfire mitigation, Rockfall and slope stabilisation works, seismic strengthening and minor works. • **Bridges:** accelerated pathway for Arthurs Point Bridge and other seismical vulnerable assets. • **Flood and waterways:** flood resilience physical works, Waterways AMP • **Energy:** accelerated delivery of energy investments across properties & infrastructure. • **EOC:** IL4 Emergency Operations Centre. • **Other Infrastructure:** Wānaka Airport and Glenorchy Airstrip resilience. • **Waste:** Transfer station resilience upgrades	• **Waterways:** District wide waterways renewals • **Bridges/ retaining walls:** Structures, bridge and retaining wall resilience programme, including Camp Hill Road Bridge and Skippers Road and Bridge upgrades • **Community:** Critical community facilities (community emergency hubs)	• Roading network resilience programme • Long term bridge replacement and alternate access decisions • Lakefront, wharf, jetty and reserve adaptation programme • Natural infrastructure expansion across growth areas • Critical community facility network adaptation • Energy resilience for critical facilities and fleet • Relocate, retire or change service where triggers are reached
~30Y Capex	**$220 – 330m**	**$280 – 470m**	**$350 – 650m**
Opex Impact	●●●●●	●●●●●	●●●●●

APPROACH & KEY FEATURES

This approach proactively strengthens resilience across a wider range of assets by investing earlier in adaptation, redundancy, alternative access, emergency facilities and climate-informed design. It shifts the focus from reactive repairs to planned risk reduction, while increasing the use of nature-based and catchment-scale responses for exposed infrastructure.

CONSIDERATIONS

This approach is appropriate where climate exposure, asset criticality, and consequence of failure indicate that delayed adaptation would create unacceptable risk. However, broad application requires careful prioritisation to remain affordable and avoid over-investment in low-viability or low-consequence areas.

EXPECTED OUTCOMES

Service continuity	Service disruption is reduced across a wider range of assets through earlier adaptation and strengthened redundancy.
Asset resilience	A larger proportion of the network is adapted to future climate and hazard conditions.
Investment influence	Resilience considerations are embedded across a wide range of investment decisions, influencing prioritisation, design, and timing.
System performance	Overall system resilience improves, with fewer high-consequence failure points over time.

Comparison of options

QUEENSTOWN LAKES DISTRICT COUNCIL

EMPHASIS	REACTIVE	TARGETED	ACCELERATED
30-year capital investment *Includes key investments within infrastructure activity types (e.g. bridges)*	● **$145-270M*** Lowest budgeted capital spend, highest future risk	●●● **$440-770M*** Balanced investment across priorities	●●●●● **$850-1.45B*** Higher upfront investment, reduced long-term risk
Risk-based investment focus	● Reactive response (unbudgeted expenditure impacts)	●●● Prioritised by consequence	●●●●● Proactive reduction
Critical asset protection	● Limited focus	●●● Tier 1 assets & corridors	●●●●● Wider network protection
Network redundancy and adaptation	● Minimal provision	●●● Key corridors & services	●●●●● System-wide redundancy
Service continuity	● Event response-led	●●● Critical services	●●●●● Built-in system resilience
Climate and hazard integration	● Awareness-based	●●● Scenario-informed design	●●●●● Embedded in all decisions

Which option should be the baseline for future infrastructure planning?

***Indicative capex ranges only.** Ranges are based on current Parks and Reserves, Property and P&I candidate project information and include planning allowances where project costs are not yet confirmed. Final values are subject to asset owner validation, business case development, LTP prioritisation, funding decisions and delivery sequencing.

Providing infrastructure for a Thriving Te Taiao

QUEENSTOWN LAKES DISTRICT COUNCIL

Overview

QUEENSTOWN LAKES DISTRICT COUNCIL

Infrastructure has a direct relationship with Te Taiao, the natural environment that sustains the district's people, places, ecosystems, economy and identity. Infrastructure can place pressure on the natural environment through emissions, waste, land disturbance, stormwater contaminants, habitat loss and resource consumption over the life of an asset.

At the same time, natural infrastructure investment can actively support the restoration, regeneration and reconnection of Te Taiao. Parks, reserves, transport corridors, stormwater systems, waste minimisation infrastructure, community facilities, renewals and growth projects can all create opportunities to improve environmental outcomes.

Whole of Life Assessment

Improving outcomes for Te Taiao requires Council to change how infrastructure choices are assessed, not just how projects are delivered. Whole of life assessment provides a practical framework for considering the long term environmental consequences of infrastructure investment, including emissions, resource extraction, waste, energy use, biodiversity impacts, climate resilience and opportunities for nature based solutions.

By applying this approach early in planning and design, Council can better understand the trade offs between options and avoid decisions that appear cheaper upfront but create higher costs or greater environmental impacts over the life of the asset. This supports more transparent, future focused investment decisions.
This is critical to improving environmental outcomes because many infrastructure impacts are locked in early, through choices about need, scope, design, materials, energy use and procurement.

Councillors are asked to provide direction as to which option should be assumed as we build the 30 year programme for specific activity areas

Guiding principles

1. **Invest in Te Taiao**
   Progress major environmental enhancement projects and nature-based solutions.
2. **Manage demand first**
   Avoid, reduce, shift, share or meet demand through non-asset solutions before new build.
3. **Optimise assets**
   Extend life, share spaces, retrofit facilities and design for modular upgrades.
4. **Renewable energy systems**
   Reduce energy demand, improve energy efficiency, support electrification
5. **Whole-of-life Assessment**
   Project gates, performance reporting, KPIs and continuous review.
6. **Progressive decarbonisation**
   Progressively assess and reduce embodied and operational carbon.
7. **Prioritise Circular Outcomes**
   Reduce construction and demolition waste, reuse materials, design for adaptability
8. **Measure and improve**
   Improved environmental performance reporting, KPIs and continuous review.

OPTION 1
Baseline environmental performance

We continue to manage environmental considerations through existing planning, consenting, procurement, and project delivery processes. Environmental improvements occur on an ad hoc, activity-led basis.

	Short-term (Y1-3)	Medium-term (Y4-10)	Long-term (Y11+)
Focus	Existing environmental management continues through current planning, consenting, renewal and project delivery processes.	Incremental environmental improvements are delivered where they align with existing projects, renewals or external funding opportunities.	Environmental outcomes remain largely project led, with limited system level visibility of cumulative impacts or improvement opportunities.
Key investments & actions	• Continue existing Parks renewals, open space minor improvements, biodiversity partnerships and pest programmes. • Progress committed revegetation, planting and reserve plan actions, including Project Tohu, Queenstown Gardens and Lismore Park. • Deliver required property, waterways, compliance and minor renewal works using existing environmental guidance.	• Continue funded Parks and open space renewal programmes, with environmental enhancements considered where practical. • Maintain biodiversity partnerships, pest animal infrastructure, planting programmes and reserve development plan actions. • Progress committed energy and asset efficiency improvements where already funded, including solar, EV charging and priority HVAC upgrades.	• Maintain opportunity-led environmental improvements through renewals, development agreements and activity-led projects. • Progress Blue Green Network, reserve and catchment enhancements where triggered by growth, renewals or external funding. • Continue biodiversity, pest control, planting and natural environment programmes within available budgets.
~30Y Capex	**$15 - 30m**	**$25 – 50m**	**$40 - 90m**
Opex Impact	●●	●●	●●

APPROACH & KEY FEATURES

Environmental impacts addressed through standard consenting, design, procurement & project management processes. Climate, biodiversity, energy, waste & freshwater considerations assessed on project-by-project basis. Existing environmental initiatives continue where already funded or operationally required. Environmental assessment is largely qualitative unless triggered by regulatory, funding, or project-specific requirements.

CONSIDERATIONS

This approach places minimal additional requirements on project teams and maintains flexibility in delivery; however it does not provide a consistent basis for comparing environmental outcomes across the capital programme.

Demand management is not consistently embedded in infrastructure planning.

EXPECTED OUTCOMES

Environmental performance	Environmental outcomes are variable across the programme, with no consistent framework for assessing or improving whole-of-life environmental performance.
Investment influence	Environmental considerations are included in investments on a discretionary basis; typically applied late in project development, limiting influence on design & delivery decisions.
System outcomes	Cumulative environmental impacts are not well understood at a system level, resulting in missed opportunities for coordinated improvement across infrastructure investment.

OPTION 2
Targeted environmental improvements

We apply environmental assessment and improvement measures selectively to major projects or those with identifiable environmental risks and opportunities. Effort is focused where it is likely to have the greatest impact.

	Short-term (Y1-3)	Medium-term (Y4-10)	Long-term (Y11+)
Focus	Targeted screening is introduced for major and high impact projects, with early focus on energy, natural infrastructure and priority environmental enhancement opportunities.	Whole of life cost, carbon, resilience and biodiversity assessment is applied to significant projects to improve investment choices and project outcomes.	Targeted environmental assessment becomes embedded in major project planning, with clearer thresholds, better tools and more consistent delivery of high value Te Taiao outcomes.
Key investments & actions	• **System**: establish tiered whole-of-life value framework, with screening for major and high-risk capital projects. Progress demand management through separate activity areas. • **Energy**: deliver aquatics LPG conversion, solar energy conversion, EV charging, Building Management System and priority community facility energy upgrades. • **Natural infrastructure:** progress Project Tohu / Coronet Forest, Blue Green Network planning, Queenstown Gardens, Mt Iron, biodiversity partnerships and pest animal programmes.	• Apply whole-of-life cost, carbon, resilience and biodiversity assessment to significant projects and renewals. • Continue energy efficiency and emissions reduction across priority buildings, including solar, HVAC upgrades, EV charging and smart building controls. • Use Blue Green Network Plan, Reserve Management Plans, catchment priorities and development agreements to direct investment to highest-value environmental outcomes.	• Embed whole-of-life cost assessment into LTP prioritisation, business cases, procurement and project reporting. • Deliver priority Blue Green Network projects, catchment restoration, water-sensitive design and nature-based interventions where benefits are strongest.
~30Y Capex	**$45 – 85m**	**$55 – 110m**	**$90 – 180m**
Opex Impact	●●●	●●●	●●●

APPROACH & KEY FEATURES

This approach strengthens demand management where it delivers clear benefits, with major projects screened for environmental impacts and higher-impact initiatives subject to more detailed assessment. Whole-of-life cost and carbon are applied for significant projects, value-for-money energy initiatives are prioritised, and nature-based and water-sensitive design options are considered where relevant.

CONSIDERATIONS

This approach focuses effort where environmental impacts & opportunities are most significant, improving practicality & implementation compared to a universal approach. Clear thresholds & guidance to ensure consistency in decision-making will be required.

EXPECTED OUTCOMES

Environmental performance	Environmental outcomes improve for major projects, while smaller scale impacts remain more variable across the programme.
Investment influence	Environmental considerations are embedded in high-impact projects and key decision points, improving outcomes where risks are greatest.
System outcomes	Environmental risks are better managed for major investments, but cumulative programme-wide impacts remain only partly visible.

OPTION 3
Delivering a greener infrastructure system

We embed environmental performance directly into infrastructure planning, investment, procurement, delivery, renewal, and reporting through a whole-of-life value framework.

	Short-term (Y1-3)	Medium-term (Y4-10)	Long-term (Y11+)
Focus	Environmental screening and whole of life value assessment are established across the capital programme, with stronger requirements built into project initiation, design and procurement.	Demand management, lower carbon design, energy efficiency, circular outcomes and nature based solutions are integrated into asset planning, renewals and delivery decisions.	A mature greener infrastructure system is operating, with environmental performance, natural infrastructure, whole of life value and Te Taiao outcomes embedded as standard practice.
Key investments & actions	• **System**: implement WoL assessment across the capital programme, with simple screening for all projects and detailed assessment for major or high-impact projects. Embed low-carbon, demand management, biodiversity, circular economy and operational impact requirements into project initiation, procurement and reporting templates. • **Energy**: Accelerate energy transition projects, including aquatics LPG conversion, solar, EV charging, HVAC upgrades & smart building controls. • **Natural Infrastructure**: Pilot nature-based and water-sensitive design through Blue Green Network, Project Tohu / Coronet Forest, Mt Iron and Wānaka Lakefront projects.	• Gradually apply WoL assessment to renewals and new assets to shift investment toward lower-impact, lower-operating-cost solutions • Expand building energy retrofits, solar, EV charging, low-emission service infrastructure and operational efficiency upgrades across the property portfolio • Scale Blue Green Network implementation, biodiversity partnerships, pest animal infrastructure, wildfire mitigation, catchment restoration and reserve regeneration across priority sites.	• Whole-of-life assessment, embodied card reduction, nature-based solutions, demand management and circular economy practices become standard practice. • Consistent environmental performance reporting, natural infrastructure asset planning and long-term maintenance settings.
~30Y Capex	**$65 – 120m**	**$110 – 200m**	**$180 – 350m**
Opex Impact	●●●	●●●	●●●

APPROACH & KEY FEATURES

This approach prioritises non-asset solutions before committing to new infrastructure, with deeper environmental analysis for major or high-risk investments. Energy, nature-based, and water-sensitive approaches are favoured where suitable, with environmental considerations embedded into infrastructure delivery and performance consistently measured over time.

CONSIDERATIONS

This approach requires stronger capability, governance & consistent application across all stages of infrastructure planning & delivery. Clear thresholds & guidance needed to ensure assessment remains proportionate to project scale & impact.

Upfront effort increases, but long-term decision-quality improves.

EXPECTED OUTCOMES

Environmental performance	Environmental outcomes are consistently improved across the programme, supported by integrated decision-making from strategy through to delivery.
Investment influence	Environmental and demand considerations are embedded across all stages of infrastructure planning and investment decisions.
System outcomes	Infrastructure delivery is more resource efficient and lower impact, with improved management of whole-of-life environmental outcomes across the system.

Comparison of options

QUEENSTOWN LAKES DISTRICT COUNCIL

EMPHASIS	BASELINE	TARGETED IMPROVEMENT	GREENER SYSTEM
30-year capital investment *Includes key investments within infrastructure activity types (e.g. bridges)*	●● **$80-170M** Lowest additional system effort	●●● **$190-375M** Focused investment in high-value opportunities	●●●● **$355-670M** Higher upfront investment, stronger long-term environmental focus
Project-level expenditure impacts	●●	●●● Selected cases	●●●● Embedded in all
Environmental assessment effort	● Project-led	●●● Major projects	●●●●● All projects – tiered approach
Lifecycle environmental outcomes	●	●●●● Where justified	●●●●● Standard practice
Decision-making influence	●	●●●	●●●●●
System visibility of impacts	●	●●●	●●●●●

Which option should be the baseline for future infrastructure planning?

Demonstrating strong asset stewardship

QUEENSTOWN LAKES DISTRICT COUNCIL

Overview

QUEENSTOWN LAKES DISTRICT COUNCIL

Renewals are the planned replacement or refurbishment of existing assets to maintain service performance and useful life. They are critical to ensuring infrastructure continues to operate safely, efficiently, and at agreed service levels.

CONTEXT

- Good asset management is essential for achieving effective asset stewardship.
- We are actively working to improve asset management capability and performance across QLDC.
- Enhancing asset management capability and performance can create significant value, including improved service delivery, cost-savings, long-term sustainability, and resilience.
- Effective asset management and investment are fundamental components of QLDC's Strategic Framework.

CONFIRMING & APPLYING AN AGREED APPROACH

- Over the next 10-30 years, our asset portfolio will change significantly, driven by network expansion, asset vesting, new technologies, and evolving service delivery models.
- Council needs to confirm its overarching asset renewal position. Three options - ranging from low to high consequence - have been developed using existing transport and waste renewal budgets. These illustrate relative differences in expenditure and outcomes under each approach.
- The agreed overall approach can then be budgeted and programmed, taking into account other planning settings (e.g. resilience) and investment decisions across each infrastructure activity.

ASSET STEWARDSHIP GUIDING PRINCIPLES

Principle	This means…
Whole-of-life management	Plan, operate, maintain, renew and dispose of assets across their full lifecycle, not just at the point of failure.
Evidence-led decisions	Use robust condition and performance data to invest in the right asset, at the right time, for the right reason.
Service, risk and cost in balance	Tension agreed levels of service against affordability and the consequences of asset failure.
Critical assets first	Prioritise investment where failure would most affect community wellbeing, safety and the environment.
Resilient, transparent and future-ready	Plan for growth, climate and resilience, and be clear about long-term trade-offs, funding and intergenerational equity.

Our existing assets represent huge historic investment that is worth protecting.

LoS performance and risk priorities

The relative priority of Level of Service performance and risk types helps guide the overall impact/criticality of asset categories.
Council should provide guidance around relative importance/priority – this is an example only for the purpose of developing comparative options.
Within the overall approach, officers will continue to make tactical level prioritisation decisions based on asset data, performance, and risk.

ACTIVITY	LEVEL OF SERVICE (where applicable to renewals)	RELATIVE PERFORMANCE PRIORITY
Transport	Roads are designed & maintained to minimise harm for all users	●●●
	Surfaces & corridor conditions provide a smooth & comfortable experience	●
	Critical routes remain open & recover quickly from disruption	●●
	Pathways are safe & accessible for all users	●
Waste	Facilities & operations provide safe, compliant & resilient service capability	●●●
	The system supports waste prevention & maximises diversion	●●

*Property-related Social & Natural/Resilience assets are work-in-progress**

+

LOWER RISK PRIORITY	MOD. RISK PRIORITY	HIGHER RISK PRIORITY
Reputational Political	Compliance Regulatory Legal	Community & wellbeing – H&S Business cont. – provision of core services Workforce – H&S, wellbeing

IMPACT	TRANSPORT	WASTE
Lower	Pathways Resilience Other (e.g lines & signs)	Public bins
Moderate	Sealed Rds (rehabs) Street Lighting Traffic Services	Minor assets
Higher	Sealed Rds (resurfacing) Environmental Structures Unsealed Roads	Facilities

*Property-related Social & Natural/Resilience assets WIP**

OPTION 1
Higher consequence and risk appetite

Short-term affordability and cost containment is prioritised by limiting renewal investment and focusing on maintaining only the most critical parts of the asset base.

	LOWER IMPACT ASSET CLASSES	MODERATE IMPACT ASSET CLASSES	HIGHER IMPACT ASSET CLASSES
Transport	Pathways Resilience Other (e.g. lines & signs)	Sealed Roads (rehabs) Street Lighting Traffic Services	Sealed Roads (resurfacing) Structures & Environmental Unsealed Roads
Waste	Public place bins	Minor Assets	Facilities
~30Y Capex	**$15 - 20m**	**$85 - 115m**	**$200 - 270m**
Opex Impact	●●●●● (increasing costs associated with monitoring and reactive maintenance)		

APPROACH & KEY FEATURES

This approach focuses only on the most critical assets, with widespread life extensions beyond optimal replacement and a strong reliance on reactive maintenance.

Planned renewals are reduced across most assets, leading to greater variability in condition and service performance, while maintaining a strong emphasis on short-term affordability and cost containment.

CONSIDERATIONS

Proceeding with this scenario requires clear acceptance of higher levels of risk and service disruption, and careful management of the consequences of deferred renewal over time. It places significant importance on prioritisation discipline and ongoing monitoring of deteriorating asset performance.

Capability and capacity to respond to more frequent reactive maintenance demands must be provisioned.

EXPECTED OUTCOMES

Investment profile	Reduced capital expenditure in the short to medium term, with increasing operational expenditure and growing future renewal liabilities.
LOS impact	Greater variability in service performance and reliability, with an increased likelihood of disruptions and outages over time.
Asset condition & risk	Asset condition deteriorates across a larger proportion of the network, resulting in a growing renewal backlog and increased risk exposure.
Long-term outcome	A more affordable near-term pathway that transfers risk, renewal demand, and investment pressures into future periods – creating significant future intergenerational impacts.

OPTION 2
Balanced approach

Renewal investment is prioritised toward high-criticality and high-consequence assets, while managing lower-risk assets through ongoing maintenance and condition monitoring to extend their useful life where appropriate.

	LOWER IMPACT ASSET CLASSES	MODERATE IMPACT ASSET CLASSES	HIGHER IMPACT ASSET CLASSES
Transport	Pathways Resilience Other (e.g. lines & signs)	Sealed Roads (rehabs) Street Lighting Traffic Services	Sealed Roads (resurfacing) Structures & Environmental Unsealed Roads
Waste	Public place bins	Minor Assets	Facilities
~30Y Capex	**$20 - 30m**	**$100 - 140m**	**$220 - 300m**
Opex Impact	●●● (some monitoring & reactive maintenance requirements)		

APPROACH & KEY FEATURES

This approach prioritises renewals based on criticality, consequence, and condition, with investment timing guided by asset performance and risk.

Lower-risk assets may have extended service lives, while programmes focus on those posing the greatest risk to service and resilience.

Selective improvements are delivered alongside renewals where they offer strong value.

CONSIDERATIONS

Delivery of this scenario relies on strong and consistent use of asset information to support risk-based decision-making.

It also requires clear agreement on acceptable levels of risk and service variability across different parts of the network.

Ongoing investment is maintenance and operational activities is needed to enable safe and efficient extension of asset service life.

EXPECTED OUTCOMES

Investment profile	Sustained and predictable capital expenditure over the long-term, with some increase in operational expenditure maintaining and monitoring lower-risk assets beyond traditional renewal points.
LOS impact	Current LOS are generally maintained in line with agreed priorities, with limited and managed variability in lower-priority asset categories where higher levels of risk are accepted.
Asset condition & risk	Critical and high-consequence assets remain protected and well-maintained, while a managed renewal backlog may develop within lower-risk asset groups where life extension remains an appropriate and monitored management response.
Long-term outcome	A resilient and affordable asset base focused on protecting critical services, supported by ongoing improvement in asset information and risk-based decision-making.

OPTION 3
Lower consequence and risk appetite

Proactive and optimised management of the asset base is prioritised, investing earlier where required to minimise whole-of-life costs and maximise long-term service reliability and resilience.

	LOWER IMPACT ASSET CLASSES	MODERATE IMPACT ASSET CLASSES	HIGHER IMPACT ASSET CLASSES
Transport	Pathways Resilience Other (e.g. lines & signs)	Sealed Roads (rehabs) Street Lighting Traffic Services	Sealed Roads (resurfacing) Structures & Environmental Unsealed Roads
Waste	Public place bins	Minor Assets	Facilities
~30Y Capex	**$25-35m**	**$130-170m**	**$290-380m**
Opex Impact	●● (lower monitoring & reactive maintenance requirements)		

APPROACH & KEY FEATURES

This approach maintains stable or improving asset condition through prioritised renewal programmes informed by criticality, consequence, and condition, supported by increased investment.

Service life is optimised for best whole-of-life value, with a sustained and predictable long-term capital and operational expenditure profile.

CONSIDERATIONS

Delivery of this scenario relies on strong and consistent use of asset information to support decision-making, but is enhanced with the ability to ensure appropriate renewal rates are in place and decisions optimise whole-of-life cost for all assets.

Continued improvement in long-term forecasting and planning capability is required, along with a robust understanding of treatment intervention options and timing.

EXPECTED OUTCOMES

Investment profile	Higher capital investment in the short to medium term, somewhat offset by reduced long-term renewal pressures and lower reactive maintenance costs.
LOS impact	Service levels are maintained or improved across the network, with reduced variability and improved reliability of asset performance.
Asset condition & risk	Asset condition is stabilised or improved across most asset groups, with reduced backlog and lower exposure to failure as a result of timely intervention.
Long-term outcome	A resilient, well-maintained asset base that delivers lower whole-of-life cost and reduced future renewal burden through optimised intervention timing.

Comparison of options

QUEENSTOWN LAKES DISTRICT COUNCIL

EMPHASIS	HIGHER CONSEQUENCE/RISK	BALANCED APPROACH	LOWER CONSEQUENCE/RISK
30-year capital investment *Indicative costs for transport & waste only*	●● **$300-400M** Lower upfront expenditure	●●● **$350-460M** Prioritise critical assets, extend life of lower risk assets	●●●● **$450-580M** Greater upfront investment
Whole-of-life cost outcome	● High reactive & expensive treatments (high opex); costly replacements (high capex)	●●● Steady and balanced over time, small backlog may develop	●●●● Investment optimised (timing & treatment)
Level of Service performance & risk mitigation	●● Deterioration in LOS & increased failure risk	●●● Critical assets LOS steady, some risk	●●●●● LOS steady, risk minimised
Asset condition & backlog avoidance	●● Increased deterioration of asset base	●●● Maintain critical assets, allow for some low impact failures	●●●●● Retain/improve condition of all assets

Which option should be the baseline for future infrastructure planning?

Confirming our future planning settings

QUEENSTOWN LAKES DISTRICT COUNCIL

Current trajectory & ambition-based choices

QUEENSTOWN LAKES DISTRICT COUNCIL

Resilience, environmental, and asset renewal settings need to be confirmed to inform infrastructure planning and investment.
The following examples show some potential combinations of options - the next phase of investment planning will incorporate agreed planning pathways for infrastructure activities and model the overall impact of Council's agreed combination of settings and pathways.

Our current trajectory looks most like this…

CURRENT APPROACH ●● **CAPEX** ●●●● **OPEX**	**GROW WELL** 2025 QLDC Projections	**RESILIENCE** Reactive, affordability-led resilience	**THRIVING TE TAIAO** Baseline environmental performance	**ASSET STEWARDSHIP** Balanced approach	This combination of options aligns most closely with our current trajectory.

Infrastructure planning could be based on an overall level of ambition and willingness to invest….

LOWER AMBITION ● **CAPEX** ●●●● **OPEX**	**GROW WELL** 2026 QLDC Projections (baseline)	**RESILIENCE** Reactive, affordability-led resilience	**THRIVING TE TAIAO** Baseline environmental performance	**ASSET STEWARDSHIP** High consequence & risk appetite	Upfront affordability is prioritised, accepting increasing risk, deterioration in LOS performance, and higher reactive opex.
BALANCED/TARGETED ●●●● **CAPEX** ●●● **OPEX**	**GROW WELL** 2026 QLDC Projections (baseline)	**RESILIENCE** Targeted for critical assets & corridors	**THRIVING TE TAIAO** Targeted environmental improvements	**ASSET STEWARDSHIP** Balanced approach	A more deliberate approach to some step-change in resilience & environmental outcomes, supported by continuing our balanced approach to renewals.
HIGHER AMBITION ●●●● **CAPEX** ●●● **OPEX**	**GROW WELL** 2026 QLDC Projections (baseline)	**RESILIENCE** Accelerated resilience uplift	**THRIVING TE TAIAO** A greener system	**ASSET STEWARDSHIP** Low consequence & risk appetite	This combination reflects the highest level of resilience, environmental, and asset renewal ambitions.

Priority-based choices

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Investment could be focused toward a specific outcome area, with some trade-offs in other areas to manage overall investment requirements…

RESILIENCE PRIORITY **CAPEX ●●●●** **OPEX ●●●**	**GROW WELL** 2026 QLDC Projections (baseline)	**RESILIENCE** Accelerated resilience uplift	**THRIVING TE TAIAO** Targeted environmental improvements	**ASSET STEWARDSHIP** Low consequence & risk appetite	Investment & actions are prioritised toward increasing system resilience. A balanced renewal approach could also be taken.
ENVIRONMENT PRIORITY **CAPEX ●●●●** **OPEX ●●●**	**GROW WELL** 2026 QLDC Projections (baseline)	**RESILIENCE** Targeted for critical assets & corridors	**THRIVING TE TAIAO** A greener system	**ASSET STEWARDSHIP** Balanced approach	Investment & actions are prioritised toward improving environmental outcomes, trading some renewal and resilience expenditure.

And some combinations can't co-exist…

AN INCOMPATIBLE COMBINATION	**GROW WELL** 2026 QLDC Projections (baseline)	**RESILIENCE** Accelerated resilience uplift	**THRIVING TE TAIAO** A greener system	**ASSET STEWARDSHIP** High consequence & risk appetite	Reducing investment in existing asset renewals would undermine our ability to achieve a resilience uplift or greener infrastructure system.

There will be different ways to give effect to agreed infrastructure planning settings (above) and 30-year infrastructure activity planning pathways (next step).

The overall 30-year infrastructure investment plan – and its impact on growth and ratepayer funding requirements – is influenced by the following factors:

- **LOS performance priorities**
- **Risk appetite**
- **Alternative funding mechanisms**
- **Revenue and financing settings**
- **Delivery models**
- **Project-level choices**
- **Market activity**
- **Partnering opportunities**

The investment plan will be analysed and optimised as part of the LTP development process, which is then reflected back into the Infrastructure Strategy.

Next steps

QUEENSTOWN
LAKES DISTRICT
COUNCIL

Infrastructure planning

QUEENSTOWN LAKES DISTRICT COUNCIL

30Y INFRASTRUCTURE PLANNING SETTINGS

GROW WELL
[agreed option]

+

RESILIENCE
[agreed option]

+

THRIVING TE TAIAO
[agreed option]

+

ASSET STEWARDSHIP
[agreed option]

=

CONSOLIDATED BASELINE PLANNING SETTINGS

INFRASTRUCTURE STRATEGIC DIRECTION & INVESTMENT CHOICES

Potential planning pathways will be presented & compared for each infrastructure type:

PATHWAY 1
[pathway name]

[overview of the pathway}

	Short-term	Medium-term	Long-term	Ongoing
Focus	[short term focus]	[medium term focus]	[long term focus]	[ongoing focus]
Key investments & actions	[key investments & actions to be prioritized in the short term]	[key investments & actions to be prioritized in the medium term]	[key investments & actions to be prioritized in the long term]	[key investments & actions to be prioritized on an ongoing/ enduring basis]
Capex req'd	Y1-10: $X-X | Y11-30: $X-X	Y1-10 $X-X | Y11-30: $X-X	Y1-10 $X-X | Y11-30: $X-X	Y1-10 $X-X | Y11-30: $X-X
Opex impact	●●●●●	●	●	●●●
Growth	●●●●	●●	●●●	●

RISK & UNCERTAINTY	RENEWAL PROFILE	LOS IMPACTS
[key risks and uncertainties associated with the pathway]	[what the likely investment renewal profile will look like over the life of the pathway]	[key changes to the LOS provision over the life of the pathway]

PARTNERING & FUNDING OPPORTUNITIES	
	Partnering: [key partnering mechanisms/opportunities]
	Funding: [key funding mechanisms/opportunities]

OVERALL ALIGNMENT

Responds to key challenges	●●●●
Delivers on objectives	●●
Aligns to expected future	●●●
Implementation feasibility	●●●●●

30Y INFRASTRUCTURE PLANNING PATHWAYS

WASTE MIN & MGT
[agreed pathway]

+

TRANSPORT
[agreed pathway]

+

COMMUNITY
[agreed pathway]

+

NATURAL/RESILIENCE
[agreed pathway]

=

MOST LIKELY 30Y SCENARIO FOR OUR INFRASTRUCTURE

Confirming our investment roadmap

QUEENSTOWN LAKES DISTRICT COUNCIL

Once 30-year infrastructure activity planning pathways have been confirmed, we can begin translating these into an investment roadmap. The scale and sequencing of this roadmap will be influenced by LTP priorities and alternative funding/delivery mechanisms.

AGREE LTP PARAMETERS & PRIORITIES

- Indicative targets/ranges for debt, rates, and funding of depreciation
- Relative priorities across levels of service, major improvements, and risk appetite to inform prioritisation
- Key assumptions

CONSIDER FUNDING, DELIVERY AND PARTNERING MECHANISMS

- Extent to which existing growth recovery mechanisms can support the indicative investment plan
- Alignment of investment to alternative funding or delivery mechanisms and how this impacts overall ability to fund
- Impacts of revenue and financing policy review

OPTIMISE THE INVESTMENT PLAN

- Investment plan (from agreed infrastructure planning pathways) calibrated to agreed parameters and priorities.
- Iterative development based on viability of/appetite for alternative funding/delivery, Council priorities, overall financial impacts, sensitivity to core assumptions, etc.

Investment roadmap and significant decisions

Over the next 30 years, we expect to invest around $XXXX of capital in our infrastructure assets and services.

The roadmap below summarises how we intend to give effect to our 'most likely' scenario. We have signalled when we expect significant decisions about our infrastructure to be required, the principal options associated with those decisions, and an approximate scale of costs. The option we have included in our 30-year capital expenditure forecast is in green text; note, this expenditure does not necessarily fall within the year in which the significant decision is signalled.

S101B(4)(b) – Identify (i) significant decisions about capex the local authority expects it will be required to make; (ii) when the local authority expects those decisions will be required; (iii) for each decision, the principal options the local authority expects to have to consider; (iv) the approximate scale or extent of the costs associated with each decision

2027/28	[summarise Y1 focus]	
	Estimated capital expenditure: $XXXM	
	Significant decision: implement organics collection	**Cost scale**
	Revoke existing commitment to introduce a kerbside organics collection	Nil
	QLDC kerbside bins; collection & processing services outsourced	Low
	QLDC processing facility & kerbside bins; collection services outsourced	High
	Significant decision: construction of a new Arthurs Point bridge	**Cost scale**
	Do not progress construction of a new bridge	Nil
	QLDC/NZTA co-fund; QLDC delivers new bridge	**High**
	QLDC/NZTA co-fund; NZTA delivers new bridge	High
	QLDC sole-funds and delivers new bridge	Very High
2028/29	[summarise Y2 focus]	
	Estimated capital expenditure: $XXXM	
	Significant decision: [tbc]	**Cost scale**

Historic Growth, Customised Projections and Growth Model

1. PURPOSE

The purpose of this paper is to provide Councillors with an overview of Queenstown Lakes District's historic and updated demand projections, the development of the district-wide interim growth allocation and scenario model, and how this evidence base can support long-term planning, infrastructure investment and growth monitoring. This paper:

- Summarises Queenstown Lakes District's historic growth trends and explains why simply extrapolating historic annual growth rates of 4.6% going forward is not considered appropriate for long-term planning.
- Provides an update on how QLDC has prepared its own projections on an annual basis;
- Explains the role of the customised Statistics NZ projections and how these have been incorporated into QLDC's May 2026 demand projections.
- Provides the updated QLDC May 2026 demand projections and outlines how they provide a stronger basis for planning across resident population, visitors, dwellings, rating units, employment and commercial activity.
- Introduces the interim district-wide growth allocation and scenario model as a shared corporate evidence base for testing how growth may be allocated across the district.
- Describes how the interim growth allocation and scenario model can support infrastructure strategy, Long Term Plan investment decisions, spatial planning, land supply analysis, housing and business capacity assessment, and growth monitoring, and
- Provides an update on the broader growth system work currently being undertaken by Council.

2. HISTORIC GROWTH TRENDS

Queenstown Lakes has grown significantly over the past 30 years

Queenstown Lakes District (QLD) has experienced sustained high population growth over recent decades. Since 1996, the resident population has grown from approximately 14,800 residents to 53,800 residents (as at June 2025). The average growth rate over this period has been 4.6%, making it one of the fastest-growing districts in New Zealand. This equates to an average annual population increase of around 1,350 people since 1996. The strongest period of growth occurred between 2015 and 2020, when annual population increases ranged from 2,100 to 3,500 people, as shown in Table 1 below.

Table 1: QLD historic growth rates

Year	Population	Annual Growth Rate	Population Increase
1996	14,800		
1997	15,400	4.05%	600
1998	15,750	2.27%	350
1999	16,100	2.22%	350
2000	16,750	4.04%	650
2001	17,850	6.57%	1,100
2002	19,150	7.28%	1,300
2003	20,400	6.53%	1,250
2004	21,800	6.86%	1,400
2005	22,900	5.05%	1,100
2006	24,100	5.24%	1,200
2007	25,400	5.39%	1,300
2008	26,300	3.54%	900
2009	26,900	2.28%	600
2010	27,500	2.23%	600
2011	28,400	3.27%	900
2012	28,800	1.41%	400
2013	29,700	3.13%	900
2014	31,300	5.39%	1,600
2015	33,400	6.71%	2,100
2016	36,100	8.08%	2,700
2017	39,000	8.03%	2,900
2018	42,500	8.97%	3,500
2019	44,600	4.94%	2,100
2020	47,100	5.61%	2,500
2021	47,300	0.42%	200
2022	47,700	0.85%	400
2023	51,500	7.97%	3,800
2024	52,900	2.72%	1,400
2025	53,800	1.70%	900

The table also shows QLD's sensitivity to global trends, including the Global Financial Crisis between 2008 and 2012 and the impacts of COVID-19 between 2021 and 2022.

QLD is not expected to continue growing by 4.6% per annum over the next 30 years

The historic growth rate provides important context, but it is very unlikely that QLD will continue to grow at 4.6% per annum over the next 30 years. As the district's population base increases, very high percentage growth rates become increasingly difficult to sustain. Growth is expected to taper over time in response to migration, natural change, development capacity and market factors.

Applying a 4.6% annual growth rate through to 2055 would result in a projected resident population of approximately 206,050 people. This would require an average annual population increase of around 5,075 people per year. QLD has never achieved this level of annual growth; the highest recorded increases were 3,800 people in 2023 and 3,500 people in 2018.

Stats NZ has consistently underestimated growth in QLD

Historically, Stats NZ population projections have tended to understate population growth in QLD. Each subsequent revision has generally been higher than the previous projection, highlighting that actual growth has continued to outpace earlier projections, as shown in Figure 1.

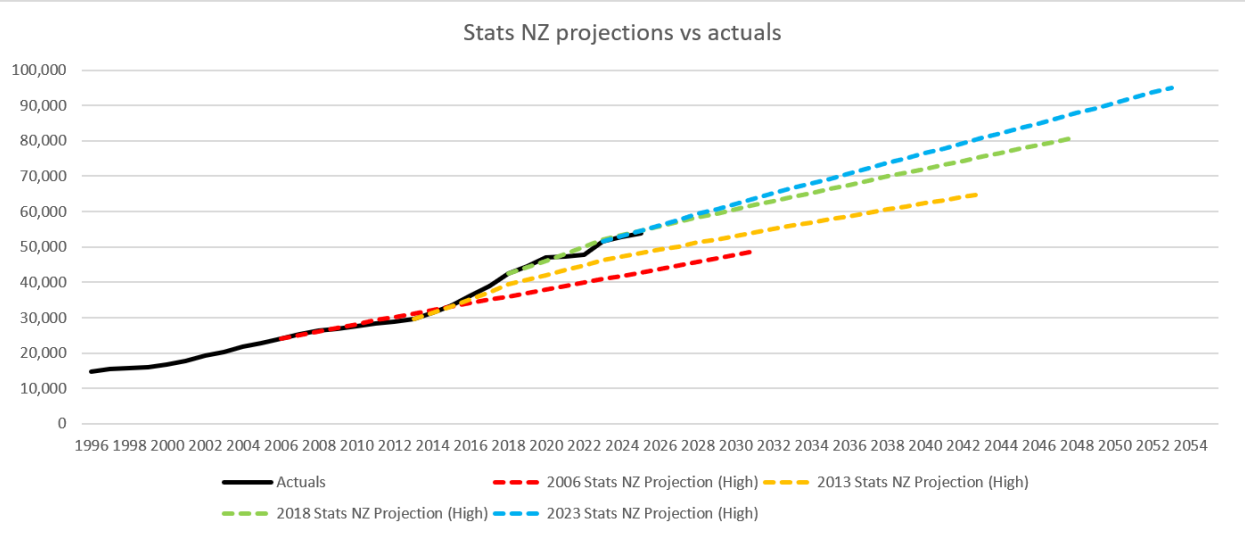

Figure 1: Stats NZ population projections vs actuals

In response, Council has prepared higher local demand projections annually to provide a more realistic basis for infrastructure planning, land-use decisions, growth management and Long Term Plan investment planning. QLDC has previously been criticised for either over-estimating growth projections, particularly following COVID-19, or being too conservative. More recently, concern has been raised that the QLDC May 2025 projections may still be too

conservative and should be more closely aligned with historic growth rates, even though they are now aligned with the most recent Stats NZ High projections.

3. UPDATED QLDC MAY 2026 DEMAND PROJECTIONS

Customised high projections respond to historic under-projection

The historic under-projection of growth across QLD has been identified as a significant issue for long-term planning. To respond to this, in early 2026 Council engaged Stats NZ to prepare customised high population projections for the district.

The request was informed by external providers, who also reviewed the outputs provided by Stats NZ. This helped ensure the projections were tested against local growth evidence and more closely reflected the district's historic growth patterns.

The customised projections address previous concerns by aligning more closely with the growth rates experienced over the past 30 years. They have been provided to QLDC at both district and ward level, giving Council a stronger basis for long-term planning and local demand forecasting.

Updated projections provide a stronger evidence base for planning future growth

The customised Stats NZ population projections are summarised in Table 2 below and assume:

- a low, stable fertility rate of 1.10;
- increasing life expectancy, reaching 90.4 years for males and 92.9 years for females by 2053; and
- net migration of 10,000 people for 2024–2028, followed by 8,000 people per five-year period thereafter.
- an average population increase of 1,970 people per year over the 30-year period.

Table 2: Summary of the customised Stats NZ projections

Year at 30 June	Births (live) - 5 years ended 30 June	Deaths - 5 years ended 30 June	Natural increase - 5 years ended 30 June	Net migration - 5 years ended 30 June
2023				
2028	3,000	700	2,200	10,000
2033	3,100	1,000	2,100	8,000
2038	3,200	1,400	1,800	8,000
2043	3,200	1,800	1,400	8,000
2048	3,400	2,400	1,000	8,000
2053	3,500	2,900	600	8,000

The customised projections indicate around 15,160 more residents by 2053 than the QLDC May 2025 projections and Stats NZ High projections, as shown in Figure 2 below. Most of this growth is expected in Whakatipu, with around one-third in the Upper Clutha.

Year at 30 June	QLDC 2025 projections	SNZ customised	Difference
2023	51,500	51,500	-
2028	59,061	63,800	4,739
2033	66,501	73,800	7,299
2038	73,773	83,600	9,827
2043	80,970	93,000	12,030
2048	88,194	102,000	13,806
2053	95,440	110,600	15,160

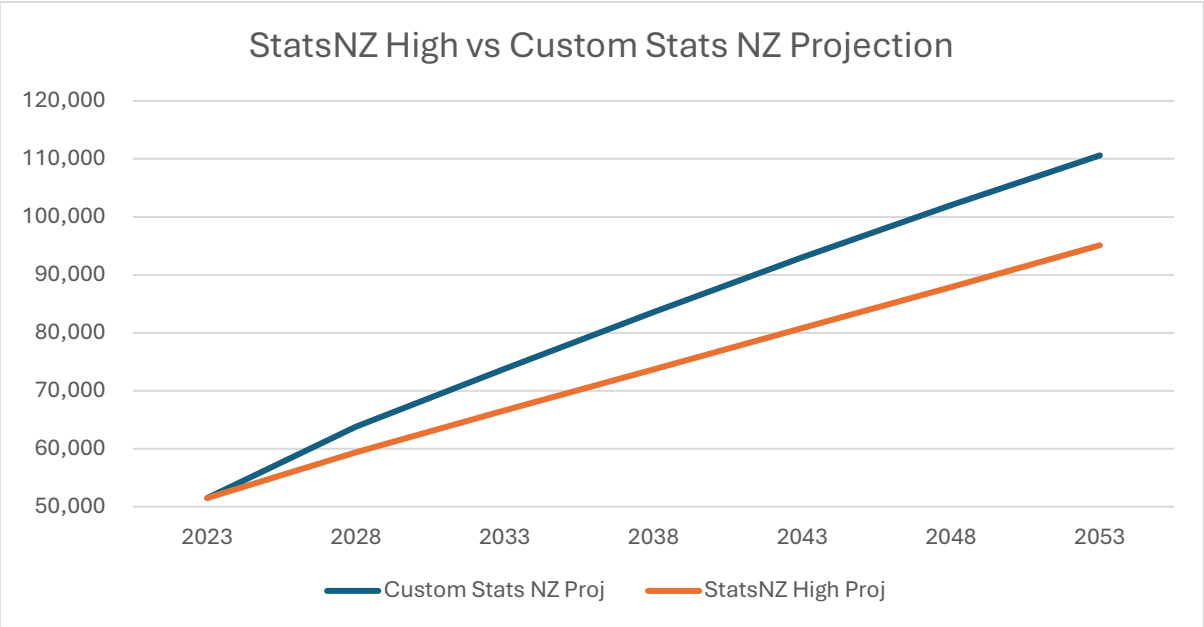

Figure 2: Comparison of customised projections and Stats NZ High

The average population increase of approximately 1,970 people per year is higher than QLD's historic average, but is considered a suitable upper bound for long-term planning given the district's recent high-growth pattern. The Stats NZ High projection / QLDC May 2025 demand projections, provides a lower bound with an average population increase of approximately 1,450 people per year. Together, these two projection pathways provide a more appropriate range for long-term planning than simply extrapolating the historic 4.6% annual growth rate. This range allows Council to monitor where actual growth is tracking over time and adjust infrastructure, land-use and financial planning assumptions accordingly.

QLDC has used the customised projections to update its demand projections

The customised Stats NZ projections were provided at district and ward level only. To make them suitable for local planning, and to inform the Infrastructure Strategy and Long Term Plan, the QLDC May 2026 demand projections applies the customised Stats NZ projections

to allocate projected growth to more specific locations across the district. This spatial allocation draws on local evidence, including:

- building and resource consent data;
- tourism data and growth trends;
- developer intentions; and
- available development capacity.

It is noted that the customised numbers were rebased to the 2025 Stats NZ estimated resident population. This results in a slightly lower starting point in 2025 for the QLDC projections compared to what was provided by Stats NZ in their customised figures. However, the QLDC May 2026 demand projections utilise the same migration and natural change assumptions provided by Stats NZ to then project out 30 years starting from the 2025 estimated resident population figure.

The QLDC May 2026 demand projections cover resident population, visitor numbers, dwellings and rating units over a 30-year period. They also distinguish between average-day and peak-day demand across QLD. A comparison of the projections is shown in Figure 3 below, with the detailed projections contained in **Attachment A**.

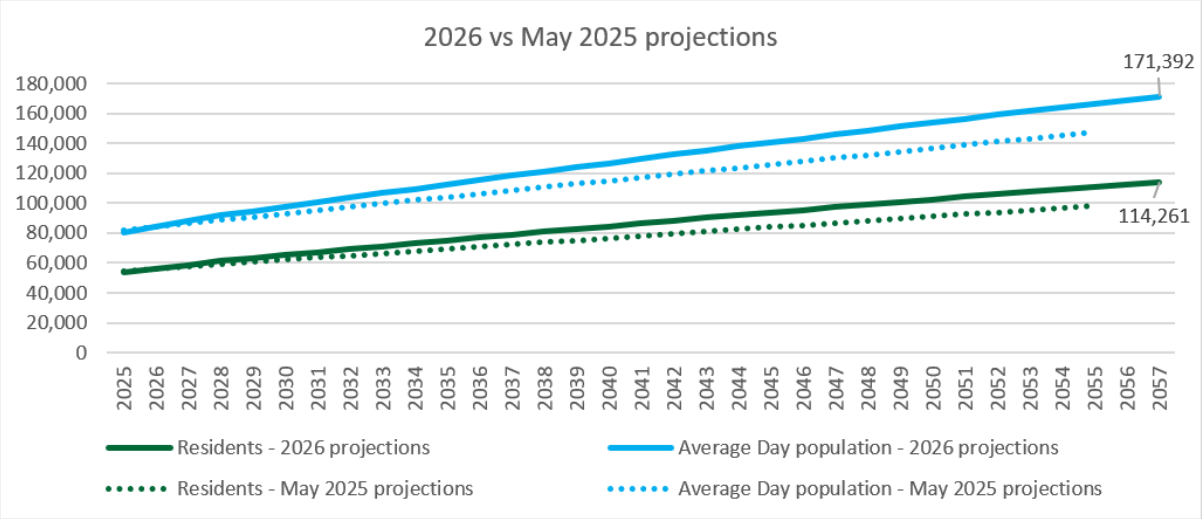

Figure 3: QLDC May 2026 compared to QLDC May 2025 demand projections

Consistent with previous projections, the resident population projections have been used to project visitor numbers, dwellings and rating units for each area of the district. The district-level method has remained broadly consistent with previous projections and is described at a high level below.

Variable	Assumptions
Resident population	Based on SNZ migration and natural change assumptions
Resident houses	Change in population and SNZ household size projections. 2025 = 2.46; 2035= 2.41; 2045= 2.36; 2055= 2.31
Holiday house	Based on historical trends of holiday houses growth per year.
Average day visitors	0.5 visitor for every resident – based on historical trends.
Peak day visitors	2.5 x peaking factor; Peak Day = 2.5 x average day visitors based on historical trends.
Total population	Residents + visitors.
Rating units	Increases linked to the applicable variable above.

The final result across the various projection categories is outlined in Table 3 below.

Table 3: Summary of QLDC May 2026 demand projections

Variable	2027	2037	2047	2057	2027 to 2037			2027 to 2057		
					Change	Annual change	Growth Rate p.a (%)	Change	Annual change	Growth Rate p.a (%)
District										
Residents	58,700	78,848	97,327	114,261	20,148	2,015	3.0%	55,561	1,852	2.2%
Total Houses	28,793	39,148	49,309	59,192	10,355	1,036	3.1%	30,399	1,013	2.4%
Average Day Visitors	29,350	39,424	48,664	57,131	10,074	1,007	3.0%	27,781	926	2.2%
Peak Day Visitors	73,375	98,560	121,659	142,826	25,185	2,519	3.0%	69,451	2,315	2.2%
Average Day Population	88,050	118,272	145,991	171,392	30,222	3,022	3.0%	83,342	2,778	2.2%
Total Rating Units	34,794	46,918	58,715	70,105	12,124	1,212	3.0%	35,312	1,177	2.4%

The QLDC May 2026 demand projections assume high near-term growth before tapering over time

The QLDC May 2026 demand projections indicate a slightly higher growth rate in the early years of the projection period (2025-2028). Growth is projected at 4.4% per annum between 2025 and 2028, before reducing to 3.1% per annum between 2028 and 2033. This reduction reflects the slightly lower migration assumptions built into the customised Stats NZ projections. The projections continue to assume an average increase of around 1,600 people per year from 2028. This remains above QLD's historic average annual growth and provides a high-growth baseline for long-term planning.

While the QLDC May 2026 demand projections provide an important baseline, they do not enable Council to test alternative growth scenarios or understand how different spatial allocation choices may affect infrastructure, land use and investment planning.

4. DEVELOPMENT OF AN INTERIM GROWTH ALLOCATION AND SCENARIO MODEL

An interim growth allocation and scenario model has been developed to test scenarios and monitor growth

To address this gap, Council has developed an interim district-wide growth projections and scenario model (the model). The model uses projection ranges as lower and upper bounds and enables Council to test how growth may be allocated between Whakatipu and Upper Clutha, and then across individual locations within each ward.

The model allocates growth across 30 model locations and 17 growth groups. It brings together population, households, employment, commercial activity and visitor accommodation, creating a more integrated evidence base for understanding how residential growth, business activity, visitor demand and infrastructure requirements interact. An economist helped inform the employment projections and allocation assumptions to ensure they are robust and defensible. Including jobs and commercial visitor accommodation is a key improvement to the demand projection base. It allows Council to assess growth pressures more comprehensively, rather than relying only on resident population, household and visitor growth.

Scenario testing helps compare different spatial growth assumptions

The model enables Council to test and compare different spatial allocation scenarios. These scenarios do not change the overall district-level projection totals. Instead, they test different assumptions about where growth may occur within the agreed growth envelope.

Table 4 provides a high-level comparison of the proposed growth scenarios. These include: 1) the QLDC May 2026 demand projections as the base case; 2) a scenario prioritising Priority Development Areas and Fast Track consents; 3) a scenario based on recent 2024/25 consenting data; and 4) a comparison scenario using the QLDC May 2025 growth projections, which are comparable with Stats NZ High. A more detailed summary is provided in the workshop slides.

Table 4: High-level scenario comparison

Scenario	Type	Main basis	Key allocation feature	Best use
QLDC May 2026 Projections	Default	Latest QLDC projections based on custom Stats NZ data	Demographic growth allocated across 29 model locations	Base case for planning and infrastructure
Prioritising PDAs and Fast Track	Policy	Scenario 1 adjusted by policy assumptions	Growth uplift in PDAs and inclusion of Fast Track consents	Test infrastructure implications of centre and dveveloper-led growth
2024/25 Consenting Data	Observed trend	Recent consenting activity and prior-year growth assumptions	Reflects actual recent development momentum	Compare short-term trends with long-term projections

QLDC May 2025 Projections	Comparison	Prior year projection set	Same broad method using earlier data	Year-on-year comparison and sensitivity testing

These scenarios provide an initial basis for understanding how different growth allocation assumptions may affect infrastructure planning, land-use decisions and investment prioritisation. They will discussed in detail at the workshop and will be refined following Councillor input and direction, particularly where Council wishes to test alternative assumptions about growth timing, development capacity, policy priorities or infrastructure constraints.

This work will support spatial planning, infrastructure strategy, land supply analysis, growth monitoring and future Long Term Plan investment decisions. It will also allow Council to monitor actual growth against projected growth and adjust scenario assumptions over time as new data becomes available.

The model uses the QLDC May 2026 and QLDC May 2025 demand projections to establish upper and lower bounds for long-term growth. This provides Council with a clearer range within which actual growth can be monitored, rather than relying on a single projection pathway.

Monitoring actual growth will help refine future planning and investment decisions

Rather than a full review of the demand projections each year, Council will monitor key assumptions and data from both QLDC and Stats NZ to assess where actual growth is tracking within this lower and upper bound. This monitoring will consider indicators such as population estimates, dwelling and rating unit growth, building and resource consent activity, development capacity, visitor demand, employment trends and migration assumptions.

This approach will help Council understand whether development is occurring faster or slower than projected, and whether growth is tracking closer to the lower or upper end of the projection range. That information will support infrastructure and financial decision-making by helping Council assess the timing, scale and prioritisation of investment against observed growth trends. This monitoring will be reported back to the Smart Growth Committee.

Ongoing engagement will help ensure future Statistics NZ projections continue to improve over time and better reflect local conditions.

Growth modelling is being further developed internally

In addition to the interim model, there is a Growth Model System Programme underway. This programme aims to strengthen how Council plans for, monitors and responds to growth. It aims to build a more consistent, transparent and joined-up evidence base to support decisions on land use, infrastructure, investment timing and long-term community outcomes. The programme is focused on three connected outcomes:

- **Trusted data:** creating a clear, traceable and well-governed evidence base, including common assumptions, definitions and timeframes.
- **Integration:** improving how information is shared across Council and key external stakeholders.
- **Long-term capability:** developing systems and processes that can be maintained, improved and updated over time.

The key areas of focus include demand projections, data and tools, monitoring and infrastructure timing, data governance, known data gaps, developer intentions, and the link between growth, rating units and revenue forecasting. These reflect the increasing complexity of growth planning and the opportunity to strengthen consistency, improve shared visibility and move toward a more coordinated organisation-wide approach.

The project team has also engaged with Hamilton City Council to understand how a more mature growth modelling system operates in practice. Hamilton's dedicated team capacity and advanced modelling capability provide a useful long-term reference point for QLDC, rather than an immediate implementation model. These insights will help inform the recommendations report and support Council's longer-term thinking about the growth system it may wish to build over time. Councillors will continue to be updated as the programme develops and implications for future planning, infrastructure investment and financial decision-making become clearer.

5. SUMMARY

Queenstown Lakes District is expected to continue experiencing strong long-term growth, but the paper explains why simply extrapolating historic growth rates is not an appropriate basis for long-term planning. The customised Statistics NZ projections and updated QLDC May 2026 demand projections provide a stronger and more defensible evidence base, indicating significant increases in resident population, visitors, dwellings, rating units, employment and commercial activity over the next 30 years.

The interim growth allocation and scenario model brings this information together into one shared corporate evidence base. It allows Council to understand where growth may occur, compare different spatial allocation scenarios, test the implications of Priority Development Areas and Fast Track consents, and monitor actual growth against upper and lower projection bounds over time. This will support infrastructure strategy, Long Term Plan investment decisions, spatial planning, land supply analysis, housing and business capacity assessment, and growth monitoring.

The model will also help identify where investment decisions are sensitive to changes in growth assumptions, making it clearer what may need to be revisited if projections change, including any implications for social infrastructure planning. Alongside this interim model, Council is progressing a broader Growth Model System Programme to strengthen data governance, integration and long-term internal capability.

Attachment C: Attachment to the Briefing Note (Detailed Demand Projections)

Variable	2027	2037	2047	2057	2027 to 2037			2027 to 2057		
					Change	Annual change	Growth Rate p.a (%)	Change	Annual change	Growth Rate p.a (%)
District										
Residents	**58,700**	**78,848**	**97,327**	**114,261**	**20,148**	**2,015**	**3.0%**	**55,561**	**1,852**	**2.2%**
Total Houses	**28,793**	**39,148**	**49,309**	**59,192**	**10,355**	**1,036**	**3.1%**	**30,399**	**1,013**	**2.4%**
Average Day Visitors	**29,350**	**39,424**	**48,664**	**57,131**	**10,074**	**1,007**	**3.0%**	**27,781**	**926**	**2.2%**
Peak Day Visitors	**73,375**	**98,560**	**121,659**	**142,826**	**25,185**	**2,519**	**3.0%**	**69,451**	**2,315**	**2.2%**
Average Day Population	**88,050**	**118,272**	**145,991**	**171,392**	**30,222**	**3,022**	**3.0%**	**83,342**	**2,778**	**2.2%**
Total Rating Units	**34,794**	**46,918**	**58,715**	**70,105**	**12,124**	**1,212**	**3.0%**	**35,312**	**1,177**	**2.4%**
Wakatipu Ward										
Residents	**38,301**	**51,179**	**61,814**	**71,559**	**12,879**	**1,288**	**2.9%**	**33,258**	**1,109**	**2.1%**
Total Houses	**17,790**	**24,402**	**30,249**	**35,937**	**6,612**	**661**	**3.2%**	**18,146**	**605**	**2.4%**
Average Day Visitors	**22,512**	**30,158**	**36,784**	**42,853**	**7,646**	**765**	**3.0%**	**20,341**	**678**	**2.2%**
Peak Day Visitors	**51,903**	**69,812**	**85,029**	**98,965**	**17,909**	**1,791**	**3.0%**	**47,062**	**1,569**	**2.2%**
Average Day Population	**60,813**	**81,338**	**98,597**	**114,412**	**20,525**	**2,052**	**3.0%**	**53,599**	**1,787**	**2.1%**
Total Rating Units	**21,471**	**29,509**	**36,621**	**43,474**	**8,038**	**804**	**3.2%**	**22,003**	**733**	**2.4%**
Arrowtown										
Residents	2,869	2,936	3,022	3,101	67	7	0.2%	232	8	0.3%
Total Houses	1,671	1,706	1,753	1,799	34	3	0.2%	127	4	0.2%
Average Day Visitors	839	895	959	1,016	56	6	0.7%	177	6	0.6%
Peak Day Visitors	2,962	3,061	3,169	3,260	98	10	0.3%	298	10	0.3%
Average Day Population	3,708	3,831	3,981	4,117	123	12	0.3%	409	14	0.3%
Total Rating Units	1,573	1,618	1,678	1,737	45	4	0.3%	164	5	0.3%
Arthurs Point										
Residents	1,636	1,986	2,269	2,528	350	35	2.0%	893	30	1.5%
Total Houses	698	878	1,034	1,185	180	18	2.3%	487	16	1.8%
Average Day Visitors	857	1,038	1,196	1,342	180	18	1.9%	484	16	1.5%
Peak Day Visitors	1,998	2,441	2,815	3,156	443	44	2.0%	1,159	39	1.5%
Average Day Population	2,493	3,023	3,465	3,870	530	53	1.9%	1,377	46	1.5%
Total Rating Units	681	885	1,064	1,236	204	20	2.7%	555	19	2.0%
Frankton										
Residents	4,542	5,903	7,509	8,981	1,361	136	2.7%	4,439	148	2.3%
Total Houses	2,125	2,827	3,710	4,569	702	70	2.9%	2,444	81	2.6%
Average Day Visitors	2,607	4,774	6,432	7,951	2,168	217	6.2%	5,344	178	3.8%
Peak Day Visitors	6,076	10,008	13,309	16,336	3,932	393	5.1%	10,260	342	3.4%
Average Day Population	7,148	10,678	13,941	16,932	3,529	353	4.1%	9,784	326	2.9%
Total Rating Units	2,699	4,007	5,332	6,599	1,307	131	4.0%	3,900	130	3.0%
Frankton Arm										
Residents	1,949	2,277	2,667	3,024	328	33	1.6%	1,075	36	1.5%
Total Houses	1,167	1,336	1,550	1,759	169	17	1.4%	592	20	1.4%
Average Day Visitors	2,504	2,942	3,359	3,740	438	44	1.6%	1,236	41	1.3%
Peak Day Visitors	4,946	5,758	6,568	7,308	813	81	1.5%	2,362	79	1.3%
Average Day Population	4,453	5,219	6,026	6,764	766	77	1.6%	2,311	77	1.4%
Total Rating Units	1,587	1,828	2,109	2,379	242	24	1.4%	792	26	1.4%
Gibbston Valley										
Residents	287	352	400	444	65	6	2.1%	157	5	1.5%
Total Houses	169	202	229	254	33	3	1.8%	85	3	1.4%
Average Day Visitors	195	230	260	287	35	3	1.7%	92	3	1.3%
Peak Day Visitors	465	549	615	676	84	8	1.7%	211	7	1.3%
Average Day Population	482	582	660	731	100	10	1.9%	249	8	1.4%
Total Rating Units	268	306	336	365	38	4	1.3%	98	3	1.0%
Glenorchy Other										
Residents	160	160	160	160	0	0	0.0%	0	0	0.0%
Total Houses	124	124	124	124	0	0	0.0%	0	0	0.0%
Average Day Visitors	139	155	171	185	17	2	1.1%	46	2	1.0%
Peak Day Visitors	335	359	379	397	24	2	0.7%	62	2	0.6%
Average Day Population	299	315	331	345	17	2	0.5%	46	2	0.5%
Total Rating Units	183	186	189	192	3	0	0.2%	9	0	0.2%
Glenorchy Township										
Residents	410	501	569	631	91	9	2.0%	221	7	1.4%
Total Houses	257	303	341	377	47	5	1.7%	120	4	1.3%
Average Day Visitors	421	507	593	671	86	9	1.9%	250	8	1.6%
Peak Day Visitors	893	1,066	1,225	1,370	173	17	1.8%	477	16	1.4%
Average Day Population	831	1,008	1,162	1,302	178	18	2.0%	471	16	1.5%
Total Rating Units	387	449	504	556	62	6	1.5%	169	6	1.2%
Jacks Point										
Residents	6,639	9,857	12,237	14,418	3,218	322	4.0%	7,779	259	2.6%
Total Houses	2,692	4,342	5,651	6,924	1,651	165	4.9%	4,232	141	3.2%
Average Day Visitors	962	1,706	2,168	2,593	745	74	5.9%	1,631	54	3.4%
Peak Day Visitors	4,186	6,933	8,830	10,572	2,746	275	5.2%	6,385	213	3.1%
Average Day Population	7,600	11,563	14,405	17,010	3,962	396	4.3%	9,410	314	2.7%
Total Rating Units	3,184	4,898	6,228	7,521	1,714	171	4.4%	4,337	145	2.9%

Variable	2027	2037	2047	2057	2027 to 2037			2027 to 2057		
					Change	Annual change	Growth Rate p.a (%)	Change	Annual change	Growth Rate p.a (%)
Kelvin Heights										
Residents	1,399	1,805	2,143	2,452	406	41	2.6%	1,053	35	1.9%
Total Houses	771	979	1,165	1,345	209	21	2.4%	574	19	1.9%
Average Day Visitors	1,117	1,352	1,563	1,757	235	24	1.9%	640	21	1.5%
Peak Day Visitors	2,460	3,014	3,494	3,933	554	55	2.1%	1,473	49	1.6%
Average Day Population	2,516	3,157	3,706	4,208	642	64	2.3%	1,693	56	1.7%
Total Rating Units	1,395	1,637	1,854	2,064	242	24	1.6%	669	22	1.3%
Kingston										
Residents	475	855	1,160	1,440	380	38	6.0%	964	32	3.8%
Total Houses	314	509	676	840	195	19	4.9%	526	18	3.3%
Average Day Visitors	132	205	267	323	74	7	4.5%	192	6	3.0%
Peak Day Visitors	517	820	1,068	1,295	303	30	4.7%	778	26	3.1%
Average Day Population	607	1,060	1,427	1,763	453	45	5.7%	1,156	39	3.6%
Total Rating Units	369	566	737	903	197	20	4.4%	534	18	3.0%
Ladies Mile										
Residents	94	1,875	3,192	4,399	1,780	178	34.9%	4,304	143	13.7%
Total Houses	41	955	1,679	2,384	914	91	37.0%	2,343	78	14.5%
Average Day Visitors	35	458	838	1,188	423	42	29.2%	1,152	38	12.4%
Peak Day Visitors	95	1,649	2,914	4,082	1,554	155	33.0%	3,987	133	13.4%
Average Day Population	130	2,333	4,030	5,586	2,203	220	33.5%	5,457	182	13.4%
Total Rating Units	64	1,020	1,796	2,548	956	96	31.9%	2,484	83	13.1%
Lake Hayes										
Residents	382	388	393	397	7	1	0.2%	16	1	0.1%
Total Houses	265	268	271	273	3	0	0.1%	8	0	0.1%
Average Day Visitors	172	187	199	210	15	1	0.8%	38	1	0.7%
Peak Day Visitors	528	550	566	579	22	2	0.4%	51	2	0.3%
Average Day Population	554	575	592	607	21	2	0.4%	54	2	0.3%
Total Rating Units	328	334	339	344	6	1	0.2%	16	1	0.2%
Lake Hayes Estate										
Residents	2,850	2,942	3,130	3,301	93	9	0.3%	451	15	0.5%
Total Houses	821	869	972	1,072	48	5	0.6%	251	8	0.9%
Average Day Visitors	292	307	337	364	15	2	0.5%	72	2	0.7%
Peak Day Visitors	1,275	1,336	1,465	1,582	61	6	0.5%	306	10	0.7%
Average Day Population	3,142	3,250	3,467	3,666	108	11	0.3%	524	17	0.5%
Total Rating Units	801	849	952	1,053	48	5	0.6%	252	8	0.9%
Millbrook										
Residents	189	221	245	267	32	3	1.6%	78	3	1.2%
Total Houses	274	290	303	316	17	2	0.6%	43	1	0.5%
Average Day Visitors	486	561	627	688	74	7	1.4%	202	7	1.2%
Peak Day Visitors	1,008	1,133	1,240	1,337	125	12	1.2%	329	11	0.9%
Average Day Population	675	782	872	955	107	11	1.5%	280	9	1.2%
Total Rating Units	351	380	405	428	29	3	0.8%	78	3	0.7%
Outer Wakatipu Other										
Residents	330	416	480	539	87	9	2.4%	209	7	1.7%
Total Houses	183	228	263	297	44	4	2.2%	114	4	1.6%
Average Day Visitors	91	110	125	138	19	2	1.9%	47	2	1.4%
Peak Day Visitors	323	394	446	494	71	7	2.0%	171	6	1.4%
Average Day Population	420	526	605	677	106	11	2.3%	256	9	1.6%
Total Rating Units	330	375	411	446	45	5	1.3%	116	4	1.0%
Quail Rise										
Residents	1,158	3,028	4,411	5,678	1,870	187	10.1%	4,520	151	5.4%
Total Houses	519	1,478	2,239	2,979	959	96	11.0%	2,460	82	6.0%
Average Day Visitors	221	665	980	1,270	444	44	11.7%	1,049	35	6.0%
Peak Day Visitors	861	2,487	3,680	4,780	1,626	163	11.2%	3,919	131	5.9%
Average Day Population	1,379	3,693	5,391	6,948	2,314	231	10.4%	5,569	186	5.5%
Total Rating Units	542	1,542	2,328	3,091	1,000	100	11.0%	2,549	85	6.0%
Queenstown Central										
Residents	895	2,248	3,248	4,164	1,353	135	9.6%	3,268	109	5.3%
Total Houses	409	1,103	1,653	2,188	694	69	10.4%	1,779	59	5.7%
Average Day Visitors	5,819	7,333	8,724	9,999	1,514	151	2.3%	4,180	139	1.8%
Peak Day Visitors	9,145	12,111	14,717	17,110	2,965	297	2.8%	7,965	265	2.1%
Average Day Population	6,714	9,581	11,971	14,163	2,867	287	3.6%	7,448	248	2.5%
Total Rating Units	1,257	2,233	3,054	3,839	975	98	5.9%	2,582	86	3.8%
Queenstown East										
Residents	1,206	1,500	1,718	1,917	294	29	2.2%	711	24	1.6%
Total Houses	909	1,060	1,179	1,296	151	15	1.5%	387	13	1.2%
Average Day Visitors	2,292	2,696	3,057	3,387	404	40	1.6%	1,095	36	1.3%
Peak Day Visitors	4,365	5,112	5,749	6,331	747	75	1.6%	1,966	66	1.2%
Average Day Population	3,498	4,196	4,775	5,304	698	70	1.8%	1,806	60	1.4%
Total Rating Units	1,184	1,401	1,581	1,753	217	22	1.7%	569	19	1.3%

Variable	2027	2037	2047	2057	2027 to 2037			2027 to 2057		
					Change	Annual change	Growth Rate p.a (%)	Change	Annual change	Growth Rate p.a (%)
Queenstown Hill										
Residents	276	768	1,132	1,465	492	49	10.8%	1,189	40	5.7%
Total Houses	128	380	581	775	252	25	11.5%	647	22	6.2%
Average Day Visitors	44	128	191	250	84	8	11.4%	207	7	6.0%
Peak Day Visitors	196	575	860	1,123	379	38	11.4%	927	31	6.0%
Average Day Population	320	896	1,323	1,715	576	58	10.8%	1,395	47	5.8%
Total Rating Units	128	381	581	775	252	25	11.5%	647	22	6.2%
Shotover Country										
Residents	4,272	4,342	4,515	4,674	69	7	0.2%	402	13	0.3%
Total Houses	1,474	1,510	1,605	1,698	36	4	0.2%	224	7	0.5%
Average Day Visitors	505	511	533	552	7	1	0.1%	47	2	0.3%
Peak Day Visitors	2,259	2,287	2,384	2,467	28	3	0.1%	207	7	0.3%
Average Day Population	4,777	4,853	5,048	5,226	76	8	0.2%	449	15	0.3%
Total Rating Units	1,034	1,070	1,165	1,258	36	4	0.3%	224	7	0.7%
Sunshine Bay-Fernhill										
Residents	3,450	3,513	3,559	3,601	62	6	0.2%	150	5	0.1%
Total Houses	1,511	1,542	1,567	1,592	32	3	0.2%	81	3	0.2%
Average Day Visitors	1,336	1,504	1,656	1,793	168	17	1.2%	457	15	1.0%
Peak Day Visitors	3,544	3,810	4,030	4,226	265	27	0.7%	681	23	0.6%
Average Day Population	4,787	5,017	5,214	5,393	230	23	0.5%	607	20	0.4%
Total Rating Units	1,503	1,567	1,623	1,677	65	6	0.4%	174	6	0.4%
Wakatipu Basin Other										
Residents	1,269	1,269	1,269	1,270	0	0	0.0%	0	0	0.0%
Total Houses	640	640	640	640	0	0	0.0%	0	0	0.0%
Average Day Visitors	290	300	307	314	10	1	0.3%	24	1	0.3%
Peak Day Visitors	1,087	1,095	1,093	1,088	7	1	0.1%	1	0	0.0%
Average Day Population	1,559	1,569	1,577	1,583	10	1	0.1%	24	1	0.1%
Total Rating Units	823	825	827	829	2	0	0.0%	6	0	0.0%
Warren Park										
Residents	1,565	2,038	2,388	2,709	473	47	2.7%	1,144	38	1.8%
Total Houses	628	871	1,063	1,251	243	24	3.3%	622	21	2.3%
Average Day Visitors	1,158	1,592	2,242	2,838	434	43	3.2%	1,680	56	3.0%
Peak Day Visitors	2,377	3,265	4,413	5,464	888	89	3.2%	3,087	103	2.8%
Average Day Population	2,722	3,630	4,630	5,547	907	91	2.9%	2,824	94	2.4%
Total Rating Units	800	1,151	1,526	1,881	351	35	3.7%	1,080	36	2.9%
Wanaka Ward										
Residents	**20,399**	**27,669**	**35,513**	**42,702**	**7,269**	**727**	**3.1%**	**22,303**	**743**	**2.5%**
Total Houses	**11,003**	**14,746**	**19,060**	**23,255**	**3,743**	**374**	**3.0%**	**12,253**	**408**	**2.5%**
Average Day Visitors	**6,838**	**9,266**	**11,880**	**14,277**	**2,428**	**243**	**3.1%**	**7,440**	**248**	**2.5%**
Peak Day Visitors	**21,472**	**28,748**	**36,630**	**43,862**	**7,276**	**728**	**3.0%**	**22,390**	**746**	**2.4%**
Average Day Population	**27,237**	**36,934**	**47,393**	**56,980**	**9,697**	**970**	**3.1%**	**29,743**	**991**	**2.5%**
Total Rating Units	**13,323**	**17,410**	**22,094**	**26,631**	**4,086**	**409**	**2.7%**	**13,308**	**444**	**2.3%**
Albert Town										
Residents	2,373	2,425	2,463	2,498	52	5	0.2%	125	4	0.2%
Total Houses	1,030	1,056	1,077	1,097	26	3	0.3%	68	2	0.2%
Average Day Visitors	519	555	588	618	36	4	0.7%	99	3	0.6%
Peak Day Visitors	1,828	1,896	1,945	1,986	68	7	0.4%	157	5	0.3%
Average Day Population	2,892	2,980	3,051	3,116	88	9	0.3%	224	7	0.2%
Total Rating Units	1,086	1,119	1,147	1,173	32	3	0.3%	87	3	0.3%
Cardrona Other										
Residents	650	650	650	650	0	0	0.0%	0	0	0.0%
Total Houses	325	325	325	325	0	0	0.0%	0	0	0.0%
Average Day Visitors	175	186	194	201	10	1	0.6%	26	1	0.5%
Peak Day Visitors	594	606	612	616	11	1	0.2%	21	1	0.1%
Average Day Population	825	835	844	851	10	1	0.1%	26	1	0.1%
Total Rating Units	466	468	470	472	2	0	0.0%	6	0	0.0%
Cardrona Valley										
Residents	283	831	1,237	1,608	548	55	11.4%	1,325	44	6.0%
Total Houses	183	464	687	904	281	28	9.8%	721	24	5.5%
Average Day Visitors	218	418	569	707	200	20	6.7%	489	16	4.0%
Peak Day Visitors	514	1,094	1,531	1,933	581	58	7.9%	1,419	47	4.5%
Average Day Population	502	1,249	1,805	2,315	748	75	9.6%	1,814	60	5.2%
Total Rating Units	334	647	895	1,134	313	31	6.8%	800	27	4.2%
Hawea Flat										
Residents	624	658	658	658	33	3	0.5%	33	1	0.2%
Total Houses	246	263	263	263	17	2	0.7%	17	1	0.2%
Average Day Visitors	84	88	86	84	5	0	0.5%	1	0	0.0%
Peak Day Visitors	376	397	389	380	21	2	0.5%	4	0	0.0%
Average Day Population	708	746	744	742	38	4	0.5%	34	1	0.2%
Total Rating Units	249	266	266	266	17	2	0.7%	17	1	0.2%

Variable	2027	2037	2047	2057	2027 to 2037			2027 to 2057		
					Change	Annual change	Growth Rate p.a (%)	Change	Annual change	Growth Rate p.a (%)
Lake Hawea										
Residents	2,761	4,132	5,713	7,163	1,370	137	4.1%	4,401	147	3.2%
Total Houses	1,319	2,025	2,895	3,741	706	71	4.4%	2,422	81	3.5%
Average Day Visitors	526	779	1,072	1,342	253	25	4.0%	816	27	3.2%
Peak Day Visitors	2,133	3,207	4,465	5,623	1,074	107	4.2%	3,491	116	3.3%
Average Day Population	3,287	4,910	6,785	8,504	1,623	162	4.1%	5,217	174	3.2%
Total Rating Units	1,804	2,515	3,390	4,241	712	71	3.4%	2,437	81	2.9%
Luggate										
Residents	781	987	1,139	1,279	206	21	2.4%	498	17	1.7%
Total Houses	324	430	513	595	106	11	2.9%	271	9	2.0%
Average Day Visitors	111	151	198	241	41	4	3.2%	130	4	2.6%
Peak Day Visitors	496	660	804	935	163	16	2.9%	439	15	2.1%
Average Day Population	892	1,138	1,337	1,519	246	25	2.5%	628	21	1.8%
Total Rating Units	329	438	529	618	109	11	2.9%	288	10	2.1%
Northlake										
Residents	1,694	1,929	2,103	2,262	235	24	1.3%	568	19	1.0%
Total Houses	764	884	980	1,073	120	12	1.5%	309	10	1.1%
Average Day Visitors	353	407	453	494	55	5	1.5%	141	5	1.1%
Peak Day Visitors	1,308	1,502	1,646	1,776	194	19	1.4%	469	16	1.0%
Average Day Population	2,047	2,336	2,556	2,756	290	29	1.3%	709	24	1.0%
Total Rating Units	970	1,094	1,194	1,291	124	12	1.2%	321	11	1.0%
Outer Wanaka										
Residents	475	508	508	508	33	3	0.7%	33	1	0.2%
Total Houses	309	326	325	325	17	2	0.5%	17	1	0.2%
Average Day Visitors	232	260	280	298	27	3	1.1%	65	2	0.8%
Peak Day Visitors	663	717	741	761	54	5	0.8%	98	3	0.5%
Average Day Population	707	767	787	806	61	6	0.8%	99	3	0.4%
Total Rating Units	312	333	337	341	21	2	0.7%	29	1	0.3%
Upper Clutha Valley Other										
Residents	395	428	428	428	33	3	0.8%	33	1	0.3%
Total Houses	225	242	242	242	17	2	0.7%	17	1	0.2%
Average Day Visitors	108	118	122	125	10	1	0.9%	17	1	0.5%
Peak Day Visitors	392	422	422	421	30	3	0.7%	29	1	0.2%
Average Day Population	503	546	550	553	44	4	0.8%	50	2	0.3%
Total Rating Units	220	238	239	240	18	2	0.8%	20	1	0.3%
Wanaka Central										
Residents	2,168	4,979	7,181	9,198	2,811	281	8.7%	7,030	234	4.9%
Total Houses	1,307	2,750	3,961	5,139	1,443	144	7.7%	3,831	128	4.7%
Average Day Visitors	1,352	2,490	3,493	4,414	1,138	114	6.3%	3,062	102	4.0%
Peak Day Visitors	3,360	6,504	9,148	11,580	3,144	314	6.8%	8,220	274	4.2%
Average Day Population	3,520	7,469	10,673	13,612	3,949	395	7.8%	10,092	336	4.6%
Total Rating Units	1,835	3,483	4,890	6,248	1,649	165	6.6%	4,413	147	4.2%
Wanaka North										
Residents	3,745	4,344	4,786	5,192	599	60	1.5%	1,447	48	1.1%
Total Houses	1,781	2,087	2,331	2,567	307	31	1.6%	787	26	1.2%
Average Day Visitors	780	952	1,204	1,434	172	17	2.0%	653	22	2.0%
Peak Day Visitors	2,986	3,530	4,106	4,629	545	54	1.7%	1,643	55	1.5%
Average Day Population	4,525	5,296	5,990	6,626	770	77	1.6%	2,100	70	1.3%
Total Rating Units	2,018	2,351	2,655	2,947	333	33	1.5%	929	31	1.3%
Wanaka Waterfront										
Residents	2,218	2,351	2,450	2,540	133	13	0.6%	322	11	0.5%
Total Houses	1,657	1,726	1,780	1,832	68	7	0.4%	175	6	0.3%
Average Day Visitors	907	1,007	1,123	1,227	100	10	1.1%	320	11	1.0%
Peak Day Visitors	3,049	3,248	3,440	3,609	199	20	0.6%	560	19	0.6%
Average Day Population	3,124	3,358	3,573	3,767	234	23	0.7%	643	21	0.6%
Total Rating Units	1,865	1,954	2,037	2,116	89	9	0.5%	251	8	0.4%
Wanaka West										
Residents	2,232	3,447	6,198	8,718	1,215	122	4.4%	6,486	216	4.6%
Total Houses	1,533	2,167	3,680	5,152	635	63	3.5%	3,619	121	4.1%
Average Day Visitors	1,474	1,855	2,499	3,094	382	38	2.3%	1,620	54	2.5%
Peak Day Visitors	3,773	4,966	7,381	9,613	1,193	119	2.8%	5,839	195	3.2%
Average Day Population	3,706	5,303	8,697	11,812	1,597	160	3.6%	8,106	270	3.9%
Total Rating Units	1,836	2,503	4,046	5,546	667	67	3.1%	3,710	124	3.8%