



Queenstown Lakes District COVID-19 Recovery Intelligence Report

September 2022

Kia whakatōmuri te haere whakamua 'I walk backwards into the future with my eyes fixed on my past'

Understanding where we have come from is as important as where we are going. This report tells the story of our district and the impact COVID19 has had on our communities. It looks to track how we recover against a number of economist predictions, but also consider the wider implications on overall quality of life.

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- ...and it could get worse if we 'do nothing'.
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- We have a vision for the future...
- ...and for recovery.

Tracking recovery

- We are tracking our progress to understand how we are weathering the storm.
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Queenstown Lakes was experiencing rapid growth.

Between 2015 and 2018 the district saw its highest rate of growth.



An increase in resident population of 3,000 people per year.



Around 800 new houses per year.



Over 1,000 accommodation units built or in construction.

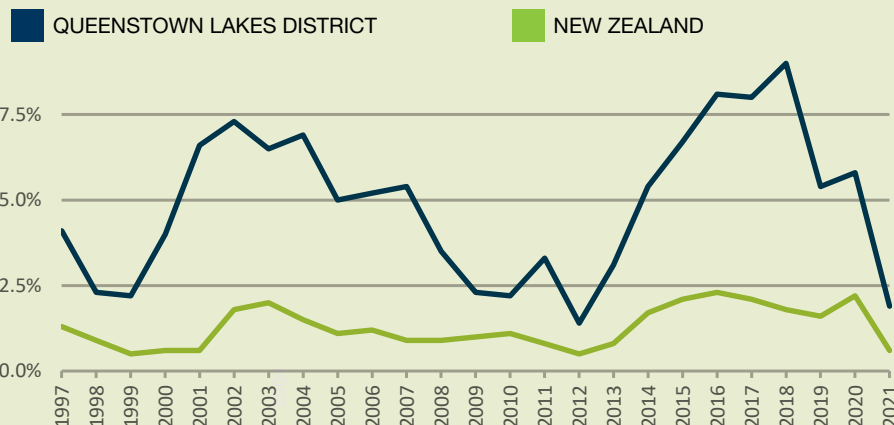
(Source: QLDC Population Projections, March 2022)

We were predicting the district would nearly double in size over the next 30 years.

Growing from the size of Napier to the size of Dunedin.

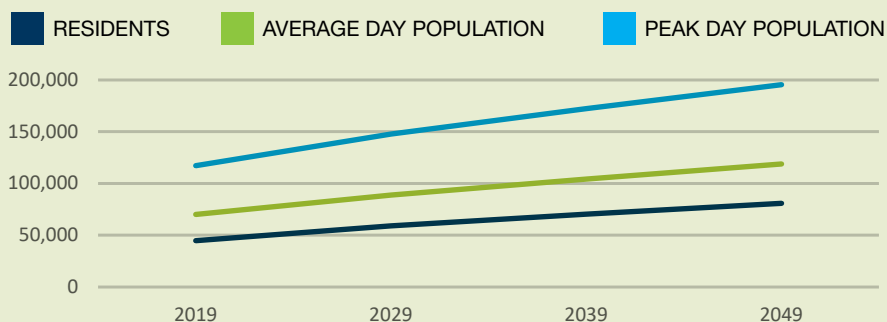
Growth in resident population peaked in 2018 at 9% annual change and has dropped to 1.9% in 2021.

However, the annual percentage change was still over double the New Zealand average. *(Source: Infometrics)*



On a peak day, almost 2 in 3 people were visitors.

And we were predicting this trend would continue.



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Providing a good quality of life for the majority of people.

The purpose of local government is “to promote the social, economic, environmental, and cultural well-being of communities”. Using each of these elements, we can explore what a good quality of life meant for our communities.

SOCIAL

The number of people enrolled with a primary health organisation in the Queenstown Lakes District (year to September 2019) increased by

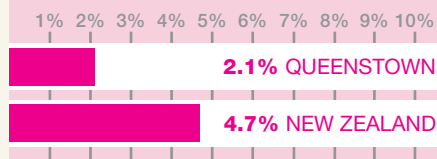
6.1%

compared with the previous year. Growth was higher relative to New Zealand, where the number of enrolments increased by only 2.0%.

SOCIAL

The percentage of people accessing a mental health service was 2.1%, compared to 4.7% for New Zealand.

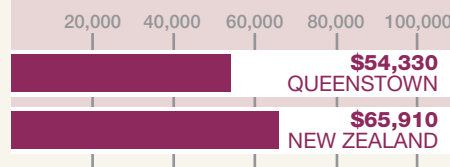
(Source: Ministry of Health Programme for Integration of Mental Health Data PRIMHD)



ECONOMIC

On average, personal earnings in 2019 were \$54,330, lower than the New Zealand average of \$65,910. However median household income was \$121,748, around 13% higher than the New Zealand average. Household income was largely unchanged in the district to 2021, while the rest of New Zealand increased 8%.

(Source: Infometrics)



SOCIAL

Life expectancy in the district is

86 years

the highest of all territorial authorities in New Zealand.

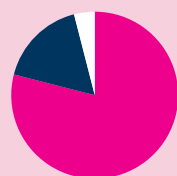
(Stats NZ three year grouped period: 2017-2019)

SOCIAL

79% OF RESPONDENTS SAID THEIR QUALITY OF LIFE IS EXTREMELY GOOD OR GOOD

17% AVERAGE

4% POOR OR EXTREMELY POOR



This compared to 76% in 2021 rating their quality of life as good or better.

(Source: Quality of Life Survey 2018 and 2019)

ECONOMIC

The annual average unemployment rate in Queenstown Lakes District was 1.1% in September 2019. This increased to 3.8% in 2021, and in June 2022 was 2.7%.

(Source: Infometrics)

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ECONOMIC

GDP sat at

\$3.4b

(2019) with growth higher than the New Zealand average at 7.2% (3.4% for New Zealand)

(Source: Infometrics)



In 2021, GDP had reduced to \$3.2b before recovering to \$3.4b by Jun 2022.

1% 2% 3% 4% 5% 6% 7% 8% 9% 10% 11%

7.2%
QUEENSTOWN

3.4% NEW ZEALAND

ENVIRONMENTAL

The district scores

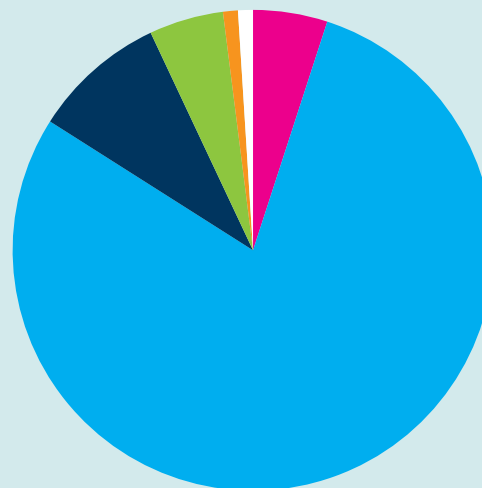
0.9

compared to the New Zealand average of 0.7, on the index that ranks performance on water quality.

(Source: Ministry of Health Annual Review of Drinking Water series. Presented by Infometrics. Summarised annually as part of the QLDC Annual Report)

CULTURAL: ETHNICITY

- MĀORI LIVING IN THE DISTRICT IS 2,094 OR 5% OF THE TOTAL POPULATION
- EUROPEAN IS THE LARGEST ETHNIC GROUP AT 32,739 OR 79% OF THE TOTAL POPULATION
- ASIAN IS THE SECOND LARGEST ETHNIC GROUP AT 3,870 OR 9% OF THE TOTAL POPULATION
- MIDDLE EASTERN/LATIN AMERICAN/AFRICAN ACCOUNTED FOR 5%
- PACIFIC PEOPLES 1%
- AND OTHER ETHNICITY 1%



(Source: Census 2018)

ENVIRONMENTAL

Over

1,800 daily

users of trails in Queenstown. In 2021, this had decreased to 1,645.

(Source: QLDC Annual Report 2020-2021)

CULTURAL: EXPRESSION OF CULTURAL IDENTITY

2%

of people (Census 2018) say they have difficulty communicating using their usual language, with a small percentage of those saying they cannot use their language at all.

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We generated value well beyond the district...

'Sustaining Tourism Growth in Queenstown' (March 2018) suggests if an international tourist visits Queenstown, spending in the rest of the South Island is

more than three times higher

than if that tourist had not visited Queenstown. This spending added

\$988 million – \$1.10 billion

to the South Island's GDP, and

9,600 – 11,600

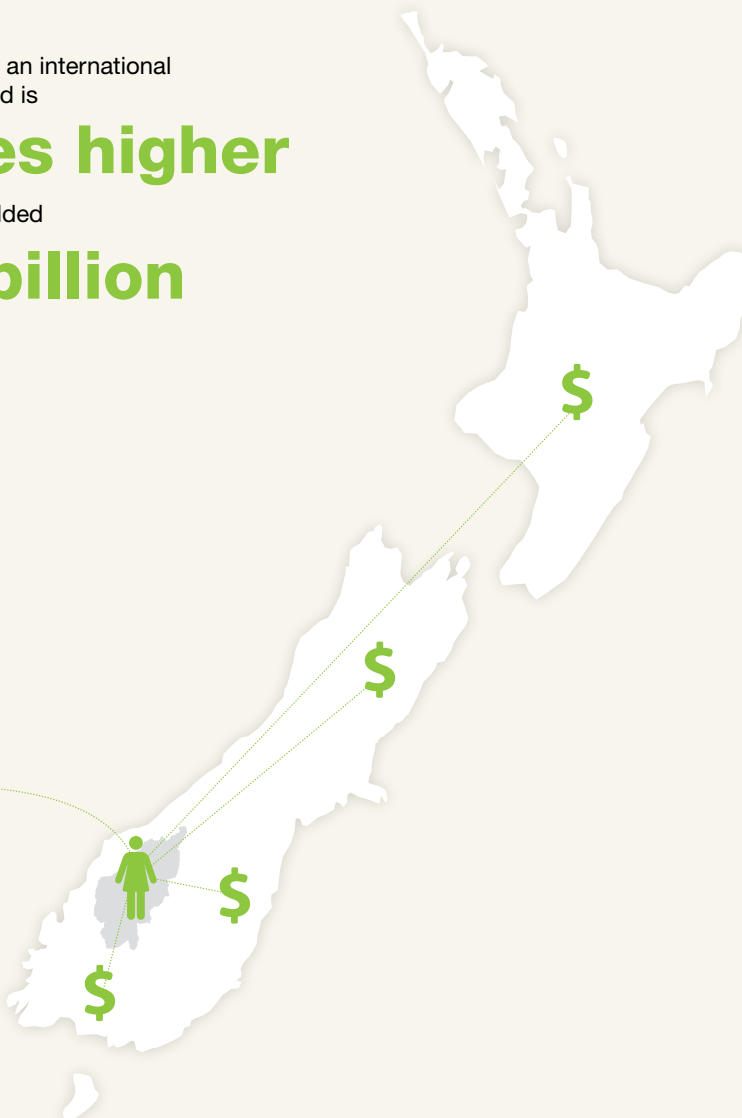
jobs in the South Island. These same visitors spent

\$1.44 – \$1.74b

per annum in NZ, equating to

\$1.3 – \$1.6b

in NZs overall GDP.



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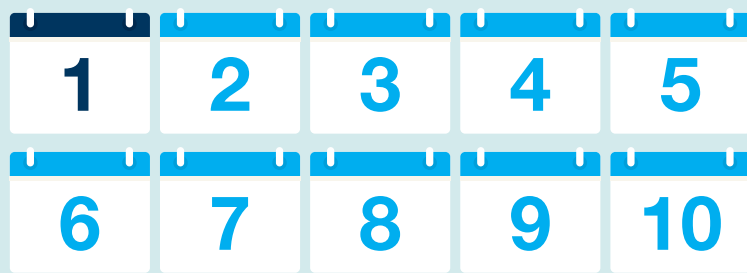
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Lonely Planet and TripAdvisor name Queenstown as one of the top experiences in NZ, as well as providing the gateway to other top spots such as Milford Sound.

The 2019 '50 most beautiful cities in the world' list 2019 (survey of travel agents and bloggers) includes Queenstown - the only NZ city listed.

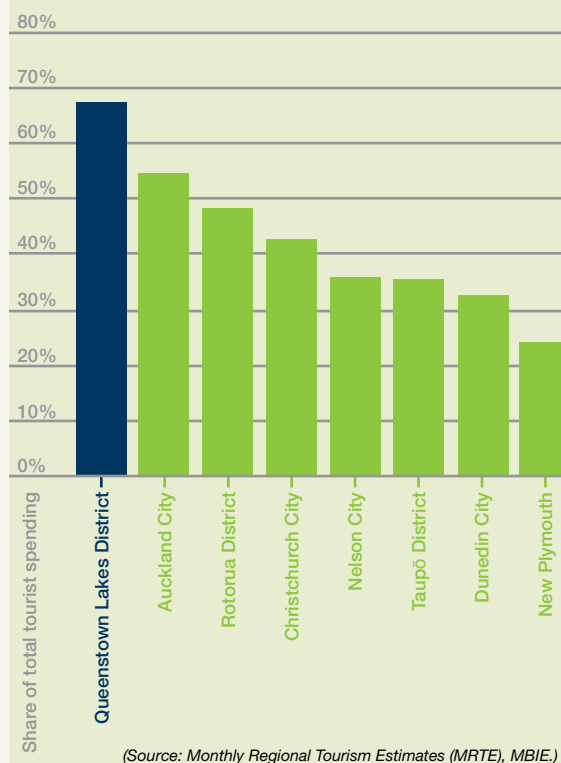
1 in every 10 international visitor guest nights were spent in Queenstown.



QUEENSTOWN

(Source: StatsNZ Accommodation Survey)

Spending per international visitor is markedly higher for international visitors to Queenstown than any other key tourist town.



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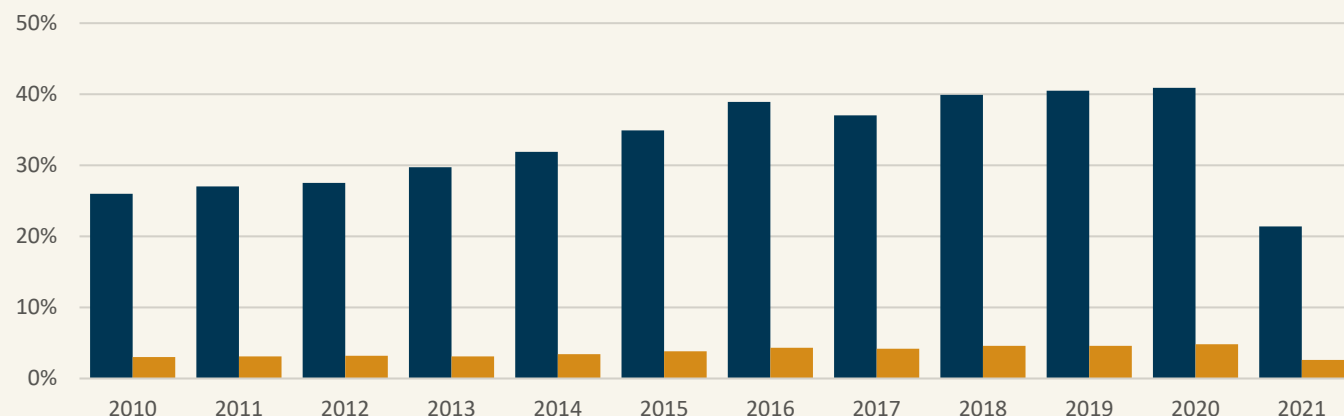
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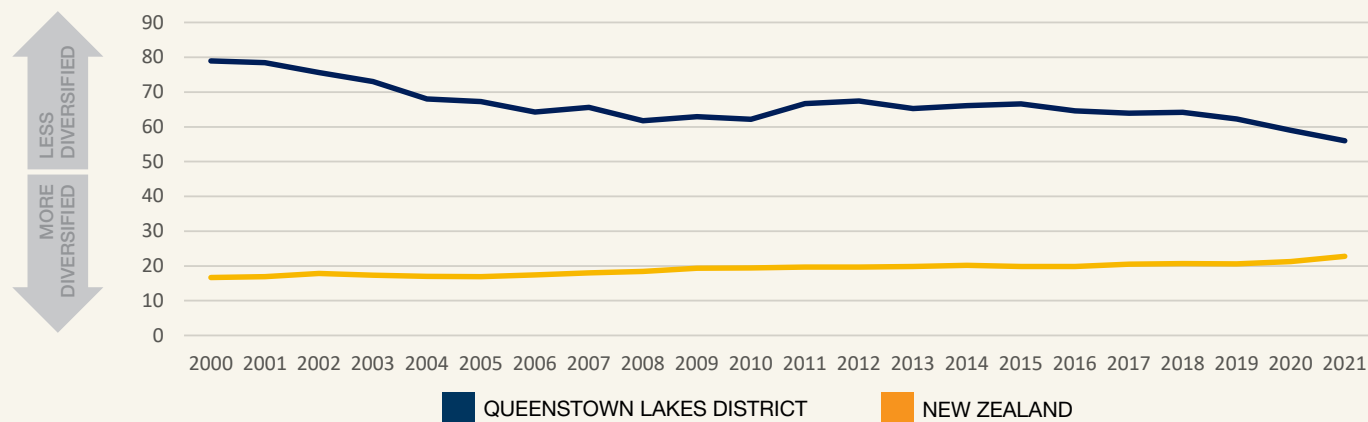
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Tourism contributed \$1.4b out of a total \$3.429b in 2019, more than 40% of our district's GDP and 57.8% of jobs (almost seven times higher than the NZ average of 8.7%).

TOURISM SHARE OF TOTAL GDP, 2010-2021 (Source: Infometrics)



DIVERSIFICATION FOR QUEENSTOWN-LAKES AND NEW ZEALAND. HHI INDEX (Source: Infometrics).



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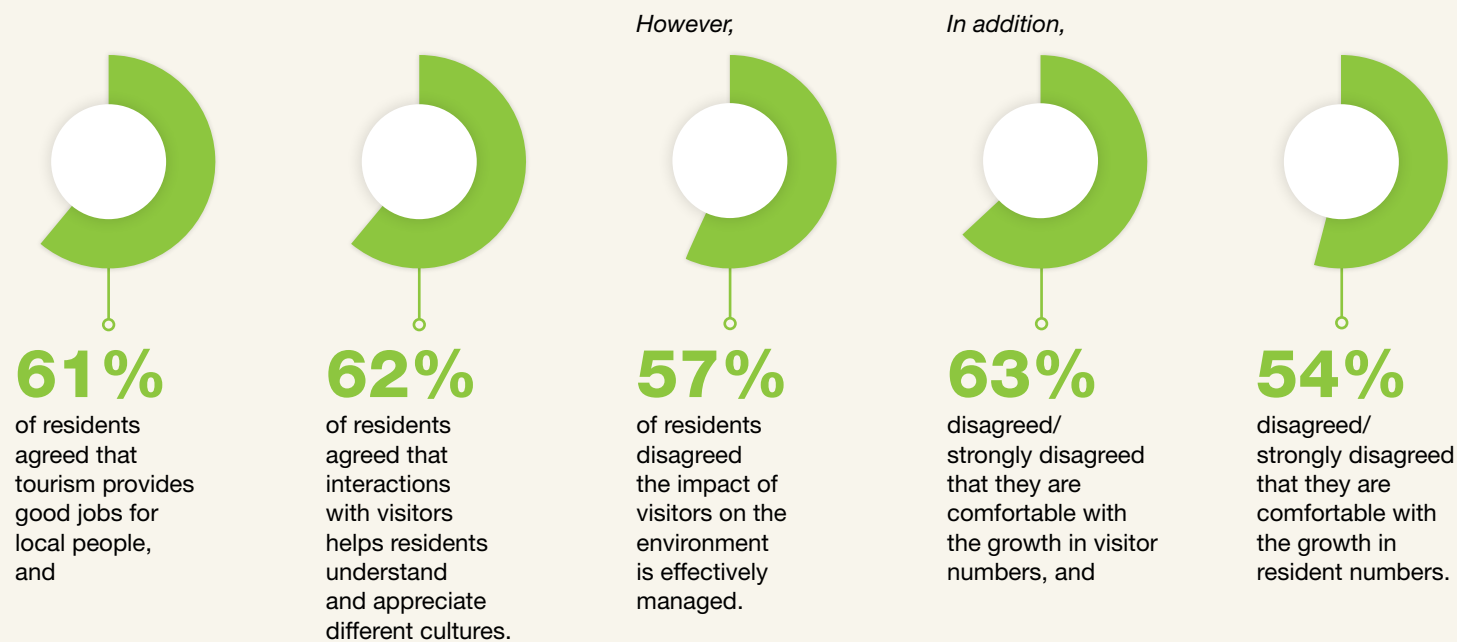
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Communities were starting to push back against growth, despite acknowledging the positive impact of the tourism industry on the local economy (measured by Quality of Life survey 2018 and 2019)



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SOCIAL

56%

of people indicated they had barriers to accessing health professionals. This was unchanged in 2021. Of these,

48%

said this was due to cost.

11%

said this was due to the length of wait.

11%

said this was due to a lack of trust and the quality of advice.

(Source: Quality of Life Survey 2019)

ECONOMIC

10%

of people living in the district were living in crowded households.

(Source: Census 2018)

ECONOMIC

Infometrics' housing affordability index, comparing average house values with mean household income, was 9.8 in March 2019.

This was well above the national value of 6.2

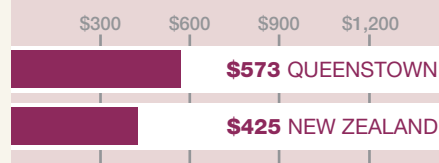
and the second highest in the country. This rose as high as 14.4 in 2021. A higher ratio suggests lower house affordability.

ECONOMIC

Average weekly rent at March 2019 was \$573 per week, compared to a national average of \$425 per week. The rental affordability index was 24.5%, compared to 20.6% nationally.

While rents decreased during Covid-19, they have quickly returned to pre-pandemic levels.

(Source: Infometrics)



ECONOMIC

18% or residents said they had no disposable income in 2019.

This grew to **20%** in 2021.

A further **18%** had more than one paid job.

(Source: Quality of Life Survey 2019)

CULTURAL

Those who rated their Quality of Life **as poor or extremely poor**

were more likely to be from an ethnic group.

ENVIRONMENTAL

75% of people were concerned or very concerned about the impact of climate change on the district. In 2021 this was up to 82%.

30% were satisfied or extremely satisfied with the steps council is taking to protect the environment. This had dropped to 19% in 2021.

(Source: Quality of Life Survey 2018)

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Data from the QLDC welfare registration form recorded the following data.



Just over

23,000

welfare requests were received, representing

7,377

unique individuals.



A total of

14,053

food vouchers were issued in Queenstown and

1,392

in Wanaka.



46%

of people registering for welfare said they were unemployed.

The estimated unemployment rate of the working age population was

11%



5,330

welfare requests were received from people on employment or short stay visitor visas.

On Wednesday 1st July, welfare provision to migrants transitioned to the Visitor Care Manaaki Manuhiri programme operated by the Department of Internal Affairs and the Red Cross. This required a transition away from the QLDC/CDEM welfare registration form, on which much of the data in this report is based.

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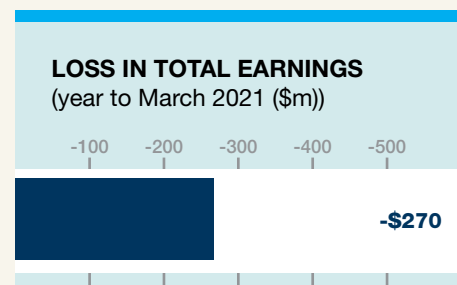
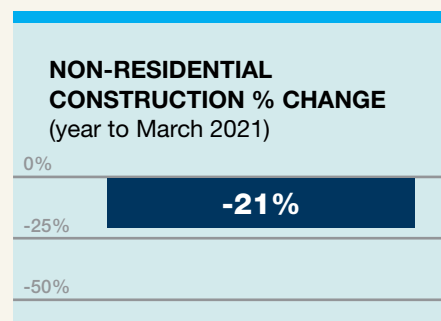
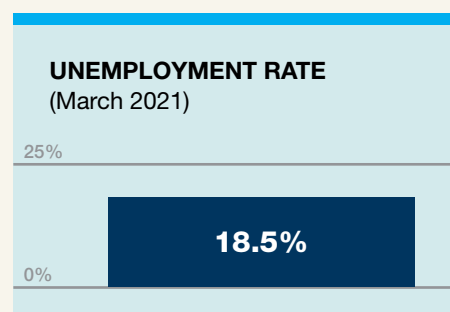
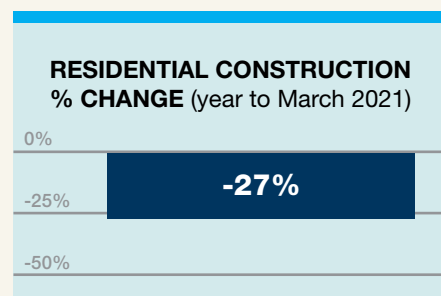
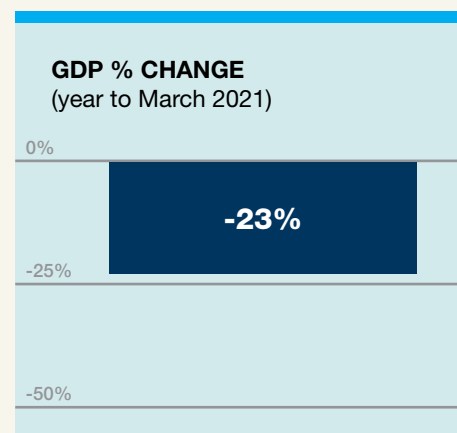
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...and it could have been much worse if we had done nothing.

The following summarises the Infometrics report, 'Economic Impacts of COVID19 on the Queenstown Lakes Economy – Early Estimates' May 2020. These numbers demonstrate a 'do nothing' scenario and can be adjusted to capture the impact of a trans-tasman bubble, as well as a greater share of domestic tourism.

QUEENSTOWN LAKES DISTRICT



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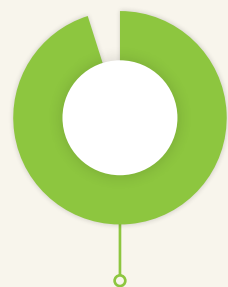
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According to the New Zealand Institute of Economic Research, our communities rank the highest for resilience despite the most significant change in employment. This methodology is based on a numbers of indicators from Census 2018. The limitation with this research is that it does not explore or discuss the capacity of the social sector within the district to support communities.

[View the research here.](#)

IN ADDITION, THE QUALITY OF LIFE SURVEY 2021 INCLUDED A NUMBER OF QUESTIONS REGARDING RESILIENCE AND FOUND THAT:



95%

The majority of residents agreed they take responsibility for their own actions



80%

Have a good support network



76%

The majority agree that they are an optimistic person



60%

Lowest levels of agreement are seen in residents agreeing that they feel supported and never lonely

RECOVERY PROJECTS HAVE SEEN GOVERNMENT, SOCIAL SECTOR AND BUSINESS WORKING TOGETHER IN PARTNERSHIP. These have included Community Trusts, Social Agencies, Business Groups, MOH, MSD, MBIE, MHUD and DOC.

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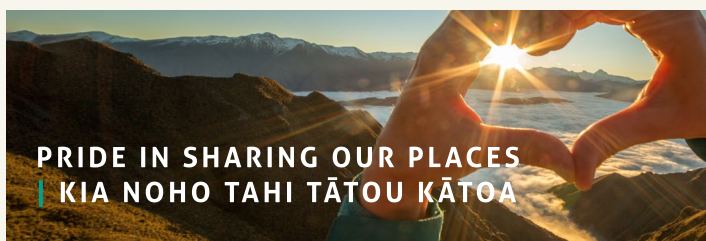
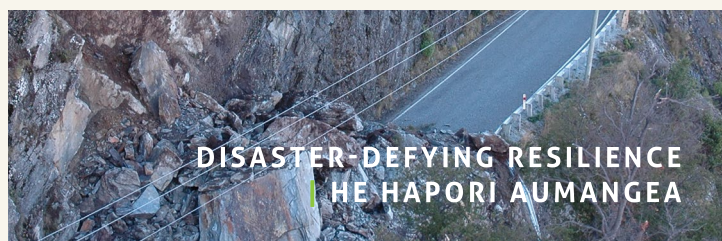
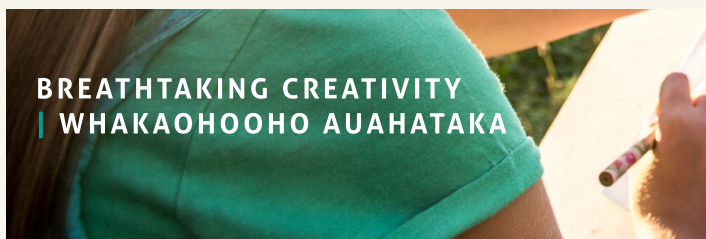
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We have a vision for the future...

We aspire to be a community that holds true to the values that collectively define what is unique about Queenstown Lakes District – our home. ‘A unique place. An inspiring future. He Wāhi Tūhāhā He Āmua Whakaohoho. Vision Beyond 2050.’ Has been developed as a vision for the community and is underpinned by the following vision statements.



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The following summarises the short to medium term goals for COVID-19 recovery in the district. The initiatives to support these goals are listed below.



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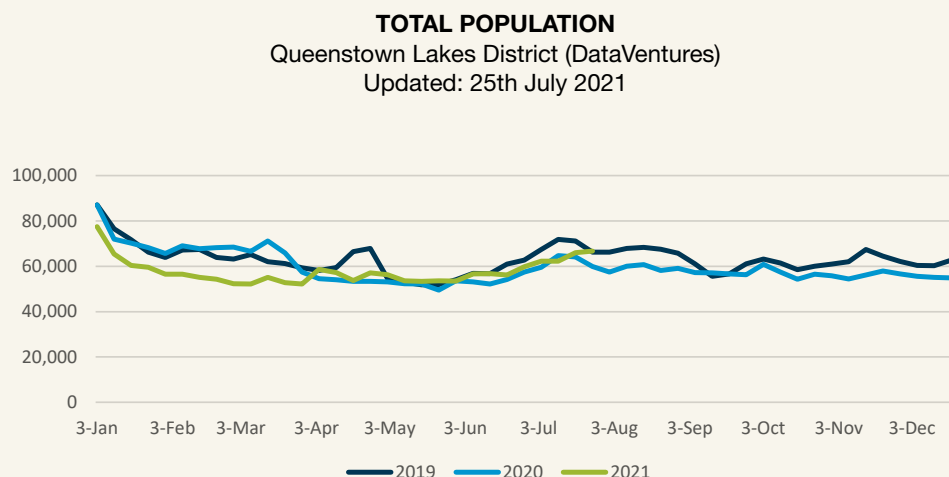
The following indicators will be updated quarterly, or when data is available.

1. POPULATION

Population data has been provided by DataVentures up until 25th July 2021.

As with many of our charts we now primarily compare current data with 2019, the most recent “normal” (i.e. pre-COVID year), although we include other years for consistency. Residents (defined as those that stay for more than 7 days in any 14 day period) as at July were on par with 2019 and above 2020 after remaining above both for most of the year. Domestic visitor numbers have continued to remain strong, eclipsing 2019 levels and trending upwards toward the 2020 post-COVID peak.

Population is estimated using mobile phone signal data. The data helps us understand the flow of both residents (determined as someone spending more than 7 days in any 14 day period in the district) and visitors in and out of the district.



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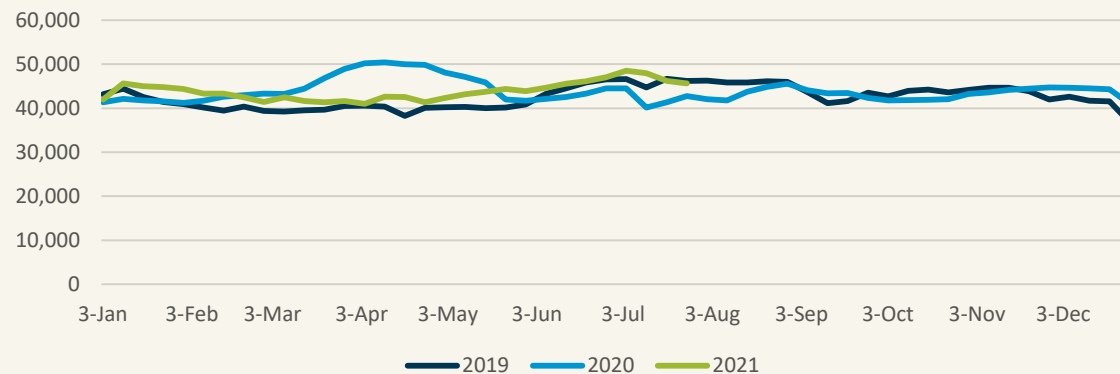
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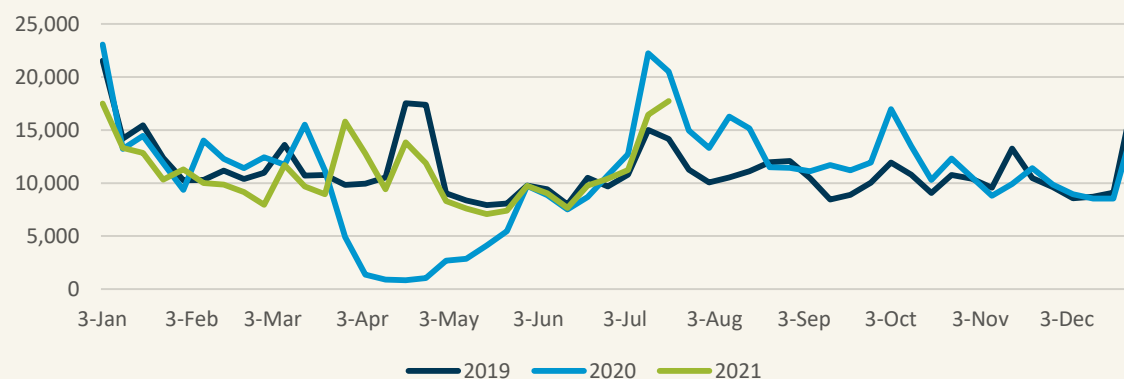
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LOCAL RESIDENT POPULATION
Queenstown Lakes District (DataVentures)
Updated: 25th July 2021



DOMESTIC VISITOR POPULATION
Queenstown Lakes District (DataVentures)
Updated: 25th July 2021



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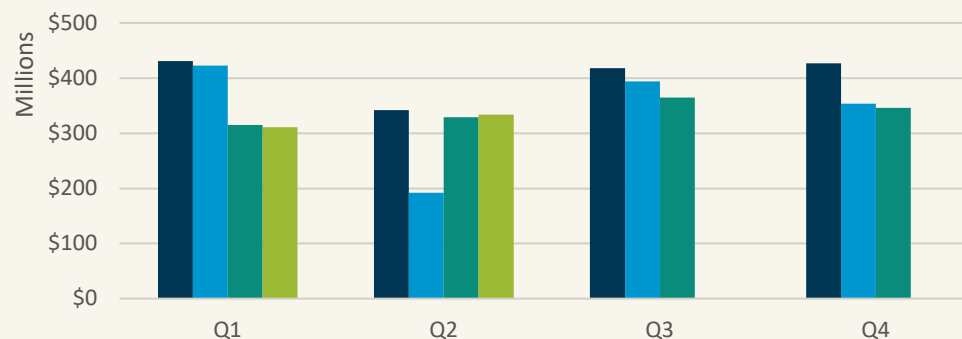
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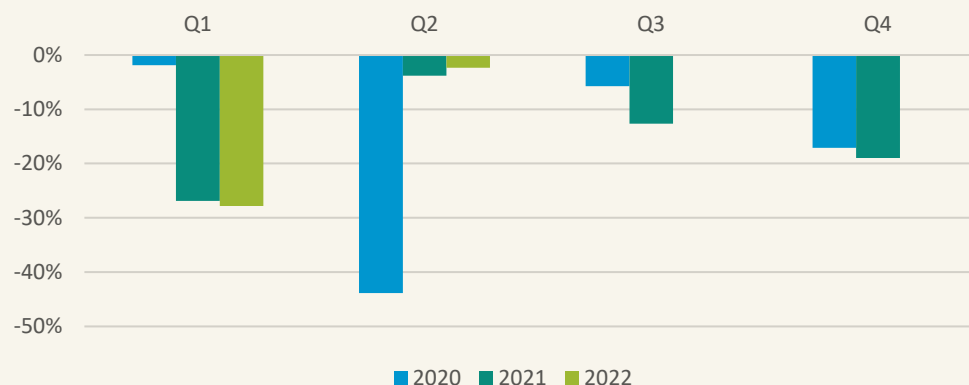
2. CONSUMER SPENDING

Consumer spending for the second quarter 2022 was marginally above last year, but 2% lower than in 2019. High inflation is artificially boosting the current quarter growth. Over the year to June 2022 Queenstown-Lakes consumer spending was down 2.6% compared to a year earlier. This compares to no change for New Zealand in total as a strong June 2021 quarter moved into last year and Covid-19 restrictions and disruptions over the last 12 months weighed on spending.

QUARTERLY CONSUMER SPENDING
Queenstown Lakes District, Marketview data from Infometrics
Updated: August 2022



CHANGE IN QUARTERLY CONSUMER SPENDING VS 2019
Queenstown Lakes District, Marketview data from Infometrics
Updated: August 2022



MarketView's Paymark data captures around 75% of point-of-sale transactions in the district. It does not include direct debit banking or online transactions.

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3. HOUSING

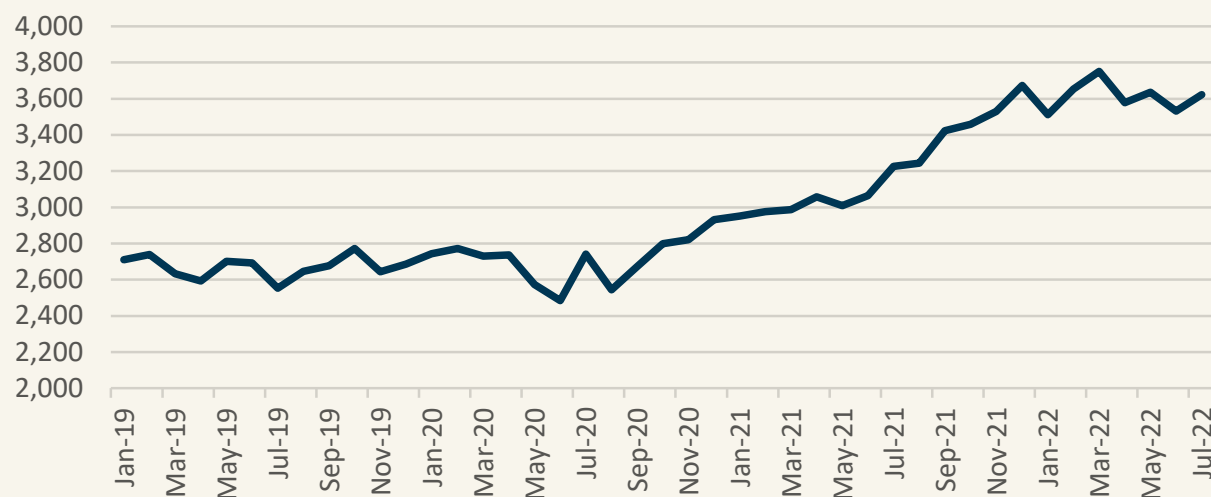
The median house price in Queenstown-Lakes in June was \$1,295,000. This was 20% up on June last year but 15% lower than the peak of May 22. The House Price Index for June was down 5% from the end of last quarter but 15% up on June 2021. June saw 106 houses sold, slightly down on 2021. Housing market momentum continues to shift nationally, with the effects beginning to be felt in our district as prices begin to show signs of plateauing.

Private sector rents continued to push upwards in June with the average rent now \$617. This compared to \$498 in June last year and is now back to similar levels as we saw prior to the pandemic.

REINZ HOUSE PRICE INDEX

Queenstown Lakes District

Updated: August 2022



Data is sourced from the Real Estate Institute of New Zealand (REINZ) monthly reports. REINZ recommend monitoring the Housing Price Index (HPI), which was developed in partnership with the Reserve Bank of New Zealand and provides a more complete picture of the New Zealand housing market.

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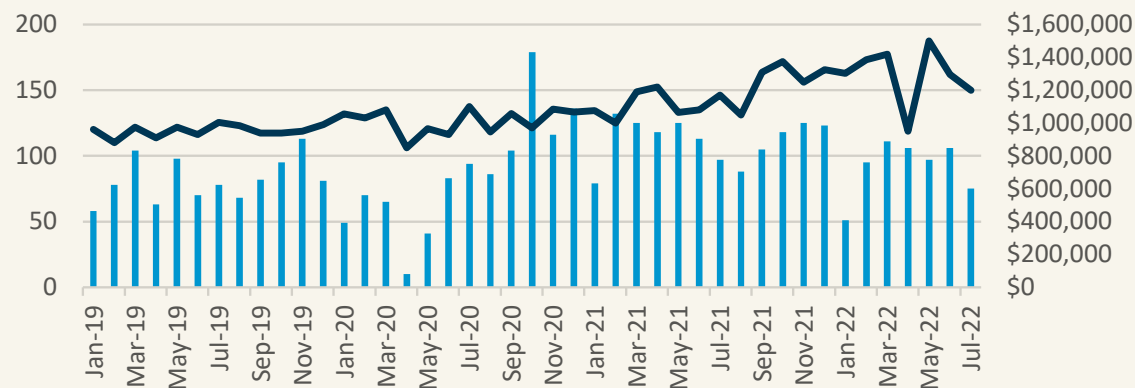
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REINZ MEDIAN HOUSE PRICE VS VOLUME SOLD

Queenstown Lakes District

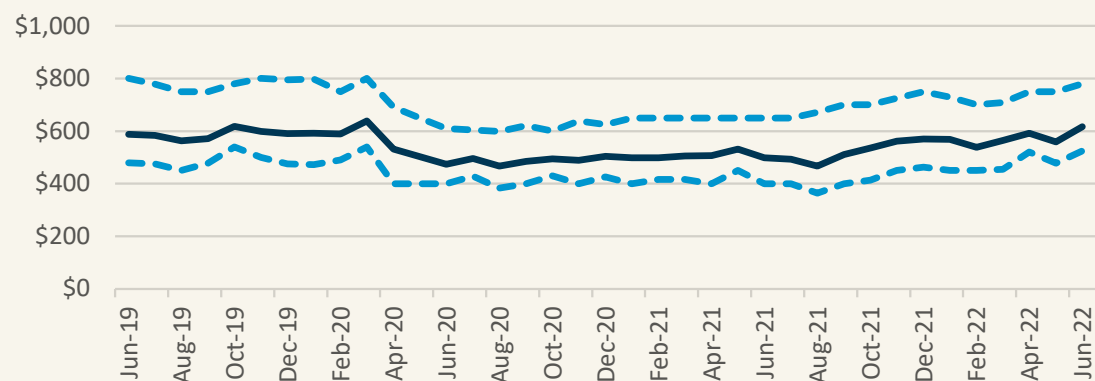
Updated: August 2022



MBIE PRIVATE SECTOR RENTS

Queenstown Lakes District

Updated: August 2022



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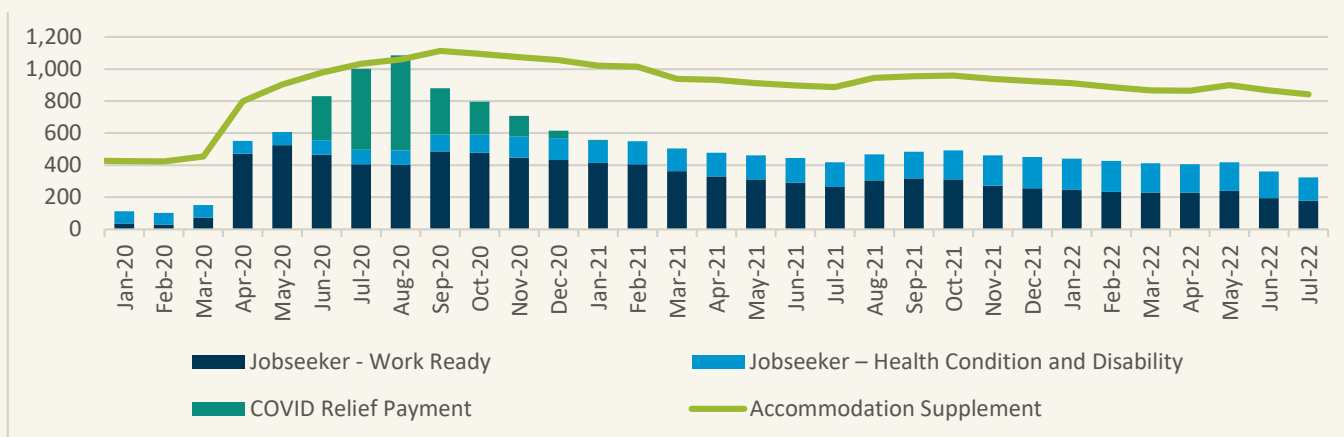
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4. UNEMPLOYMENT

JobSeeker work ready numbers have continued to decline through 2022, down 33% on a year ago and 63% from their peak in May 2020. This number is still considerably higher than pre-COVID.

While the opening of the international border is welcome news for the district, businesses still face an uncertain future with many facing staff shortages due to illness and difficulty in finding new staff to cope with the increased demand.

MSD BENEFIT RECIPIENTS
Queenstown Lakes District
Updated: August 2022



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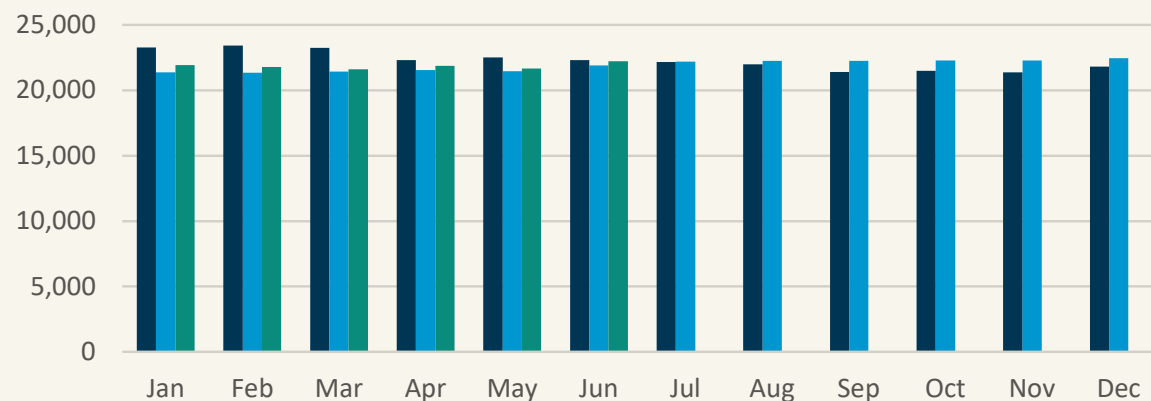
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5. FILLED JOBS

The number of filled jobs in the district increased by 1% in June 2022 compared to one year earlier. This was also up 1% on June 2019. Accommodation and Food Services continues to be the most affected industry, losing 147 jobs in the last year and 1,059 since 2019. Conversely, Construction and Professional, Scientific and Technical Services have increased 135 and 168 jobs since Jun 2021 and 607 and 288 since 2019 respectively.

FILLED JOBS
Queenstown Lakes District
Updated: August 2022. Source: StatsNZ.



Filled jobs are reported through StatsNZ monthly employment indicator which collates data from pay day filing.

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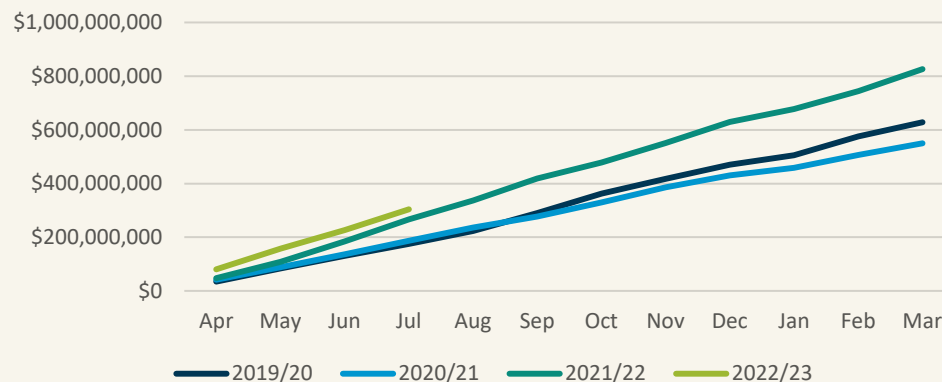
6. CONSTRUCTION CONSENTS

Construction consents are a leading indicator of future construction activity. The value of residential construction consents in the year ending June 2022 was \$867m, up 45% on the previous 12 months and well above the year ending June 2020. This compares to an increase of 14% nationwide. Non-residential construction consents were \$217m, well above 2021 but considerably down on 2020.

RESIDENTIAL BUILDING CONSENTS - CUMULATIVE

Queenstown Lakes District

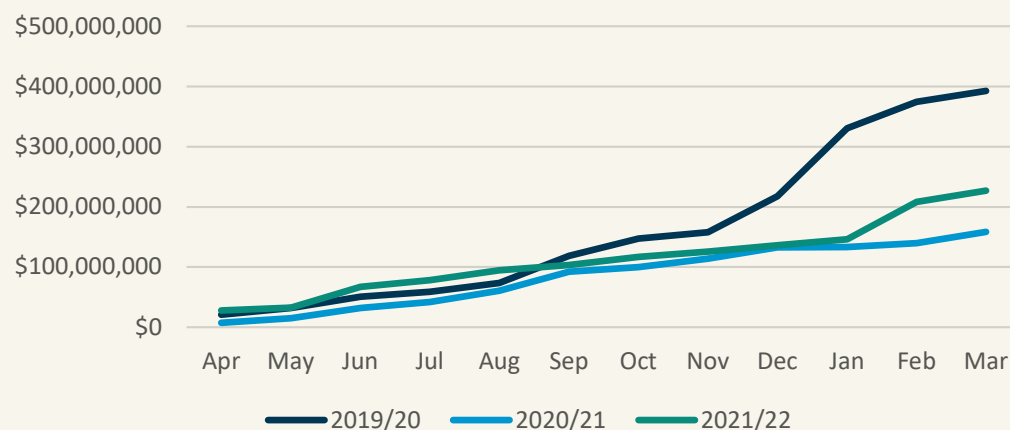
Updated: August 2022. Source: QLDC.



COMMERCIAL BUILDING CONSENTS - CUMULATIVE

Queenstown Lakes District

Updated: August 2022. Source: QLDC.



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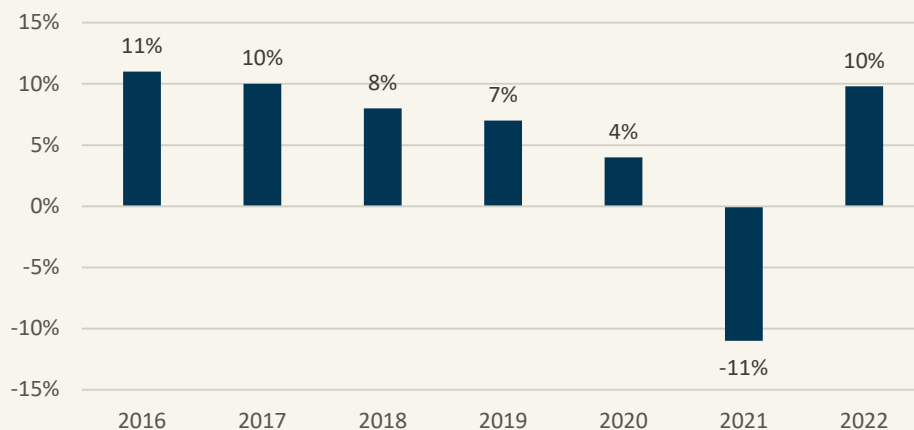
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GDP % CHANGE (ANNUALLY, INFOMETRICS)

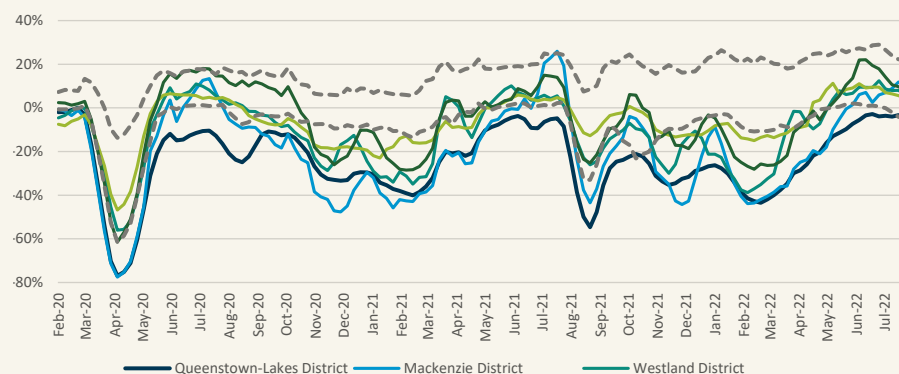
Updated: May 2022



CONSUMER SPENDING BY TERRITORIAL AUTHORITY

MarketView Data, from mbie.govt.nz

Updated: August 2022



7. QUEENSTOWN LAKES GDP AND SPENDING IN THE NATIONAL CONTEXT

Queenstown-Lakes GDP rose 10% for the year ending March 2022 to \$3.5m, however this is still 2% below the March 2020 peak. Growth in the district was higher than the nationwide 5%, however the district was the worst hit economy in 2020 and fell considerably more than other areas. Growth did stall slightly for the 3 months ending March 2022 after 3 quarters of consecutive increases, with Omicron, higher interest rates and increasing inflation all playing a part.

When comparing resident and visitor spending with other parts of the country to what they were in 2019, we can still see the effect that is being had on tourism reliant economies such as Queenstown-Lakes and Mackenzie. These two districts are still experiencing spending contractions unlike any other district in the country.

TERRITORIAL AUTHORITY	GDP CHANGE, YE MAR 22
Queenstown Lakes	9.8%
Mackenzie	4.5%
Auckland	3.8%
Waitomo	1.7%
Westland	5.2%
Rotorua	5.0%

Source: Infometrics.

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Ensuring initiatives are aligned with recovery goals.

	 Meet basic needs	 Support job and business creation	 Restore community stability	 Increase diversity and productivity	 Strengthen community and partnerships	 Enhanced natural environment
Kia Kaha QL Hub	● ● ●	●	●		● ●	
In the Wild Partnership					● ●	● ● ●
Workforce Alliance		● ● ●	●			●
Key Talent Retention		● ●			● ●	
Infrastructure projects		● ● ●			●	●
Diversification Plan		● ●		● ● ●		
Torokiki idea portal (Challenges 1-3)		● ● ●	● ● ●		● ●	● ● ●
Mayoral Short-Term Taskforce	● ●	● ● ●			● ●	
Regenerative Recovery Advisory Group				● ● ●	● ●	● ● ●

Underpinned by best-practice data, analysis and modelling.

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To complement the recovery indicators, we have a programme of survey work that will enrich the picture with qualitative data on our communities. The three surveys we will use are:

Quality of Life survey

The survey explored the impact of COVID-19 on the wellbeing of communities. The results of the survey are now available here www.qldc.govt.nz/community/community-research

Social Sector Capacity Study

The results of this survey are available on our website. The study looks at the increased demand that social agencies are experiencing, along with their capacity to deliver.

Welfare follow up survey

We have contacted individuals who registered for welfare to understand their current circumstances, as well as provide information regarding options for welfare under the Visitor Care Manaaki Manuhiri programme. The results from this survey are available on our website.

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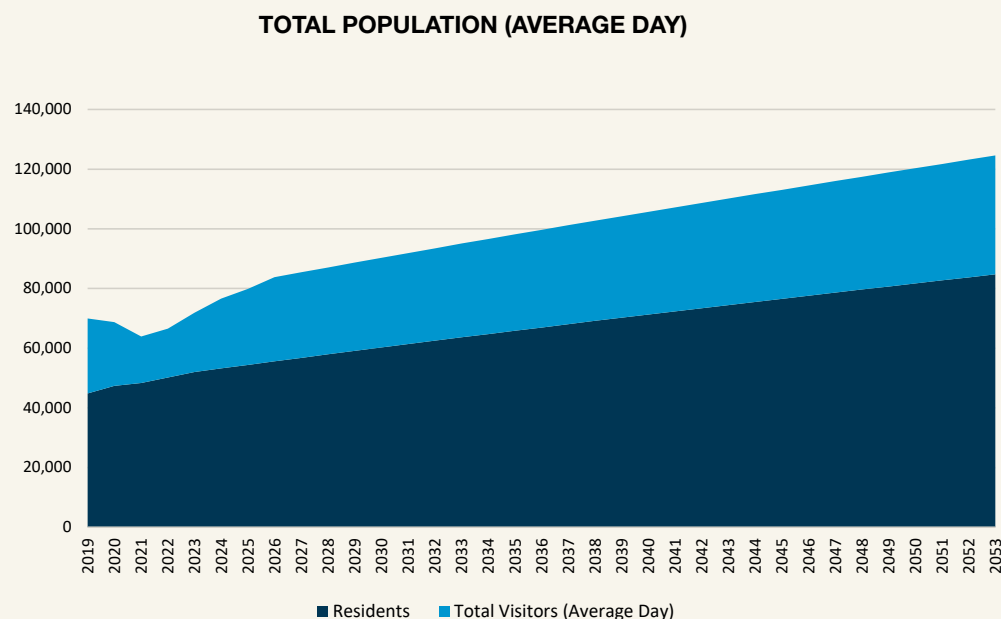
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QLDC has issued a 2022 update to the demand projections. These show the average day population returning to pre-COVID levels in 2023, and growth slowing down from 2026 onwards.



As in the past, the Queenstown Lakes brand is imperative to national tourism. The slow down affords us time to test approaches to destination management, diversification and climate action, which can then be replicated across New Zealand.

This creates a unique value proposition for both kiwis and visitors alike who recognise the outstanding opportunities the district presents to live, work and play.

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