

# Queenstown Lakes District COVID-19 Recovery Intelligence Report

May 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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- We generated value well beyond the district...  
...and were the jewel in New Zealand’s crown.
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**Impact of COVID-19 on the district**

- When COVID-19 shut our borders, it cut off the bloodstream to the district...  
...and it could get worse if we ‘do nothing’.
- We are united by resilience and a desire to achieve more by working together.
- 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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- Ultimately, these outcomes matter because what made the district a jewel before, remains.

# Queenstown Lakes was experiencing rapid growth.

**Between 2015 and 2017 the district saw its highest rate of growth.**



An increase in resident population of 2,000 people per year.



Around 1,000 new houses per year.



Over 1,000 accommodation units built or in construction.

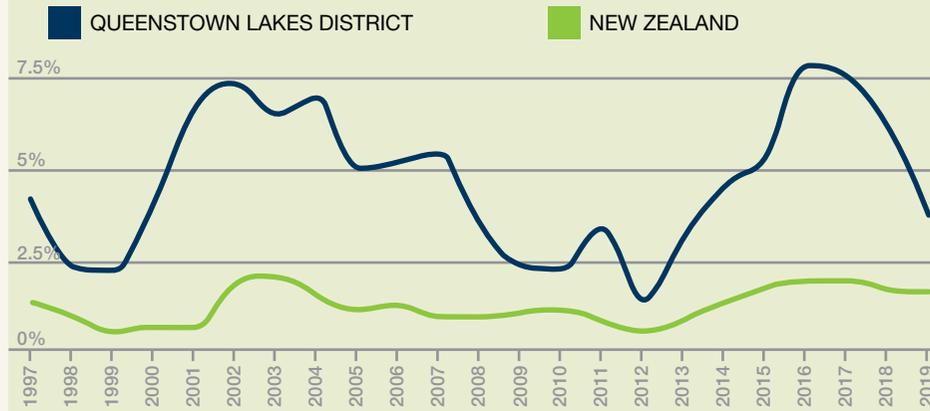
*(Source: QLDC Population Projections, December 2018)*

**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.

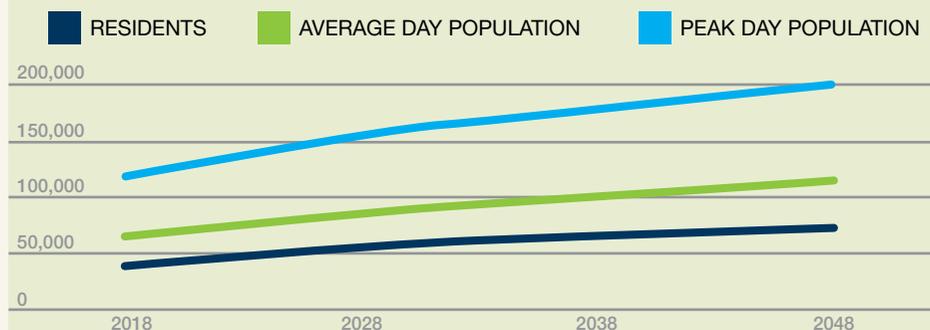
**Growth in resident population peaked in 2016 at 7.8% annual change and dropped to 3.7% in 2019.**

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



**On a peak day, 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

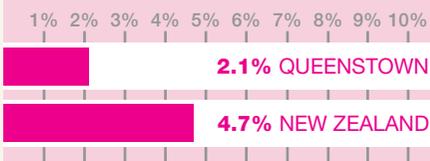
# 6.1%

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

## SOCIAL

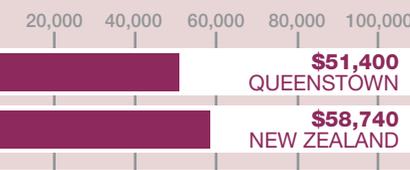
The percentage of people accessing a mental health service was 2.1%, compared to 4.7% for New Zealand.

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



## ECONOMIC

On average, personal earnings were \$51,400, lower than the New Zealand average \$58,740 (measured quarterly by Linked Employer-Employee Data published by Statistics New Zealand). However, median household income was \$73,300, around \$10,000 higher than the rest of New Zealand.



## SOCIAL

Life expectancy in the district is

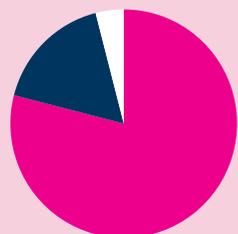
# 83.9 years

around 2 years more than the New Zealand average.

(Source: Infometrics three year grouped period – 2015-17)

## SOCIAL

- 79% OF RESPONDENTS SAID THEIR QUALITY OF LIFE IS EXTREMELY GOOD OR GOOD
- 17% AVERAGE
- 4% POOR OR EXTREMELY POOR



(Source: Quality of Life Survey 2018 and 2019)

## ECONOMIC

The annual average unemployment rate in Queenstown Lakes District was

# 1.1%

in September 2019.

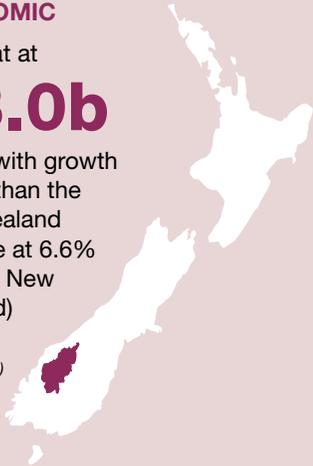
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**ECONOMIC**

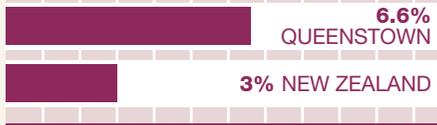
GDP sat at  
**\$3.0b**

(2019) with growth higher than the New Zealand average at 6.6% (3% for New Zealand)

(Source: Infometrics)



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



**ENVIRONMENTAL**

The district scores

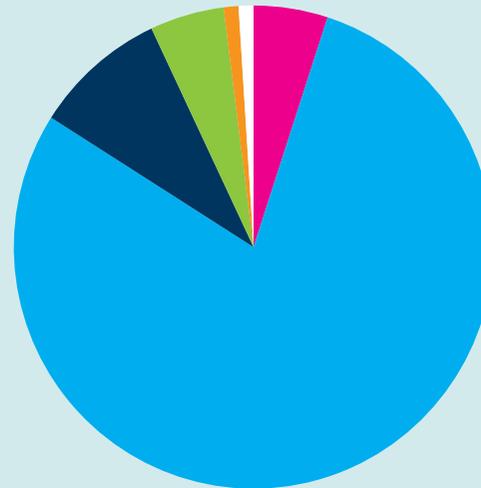
**0.9**

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.

(Source: QLDC Annual Report 2018-2019)

**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

(Source: Quality of Life Survey 2019)

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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**

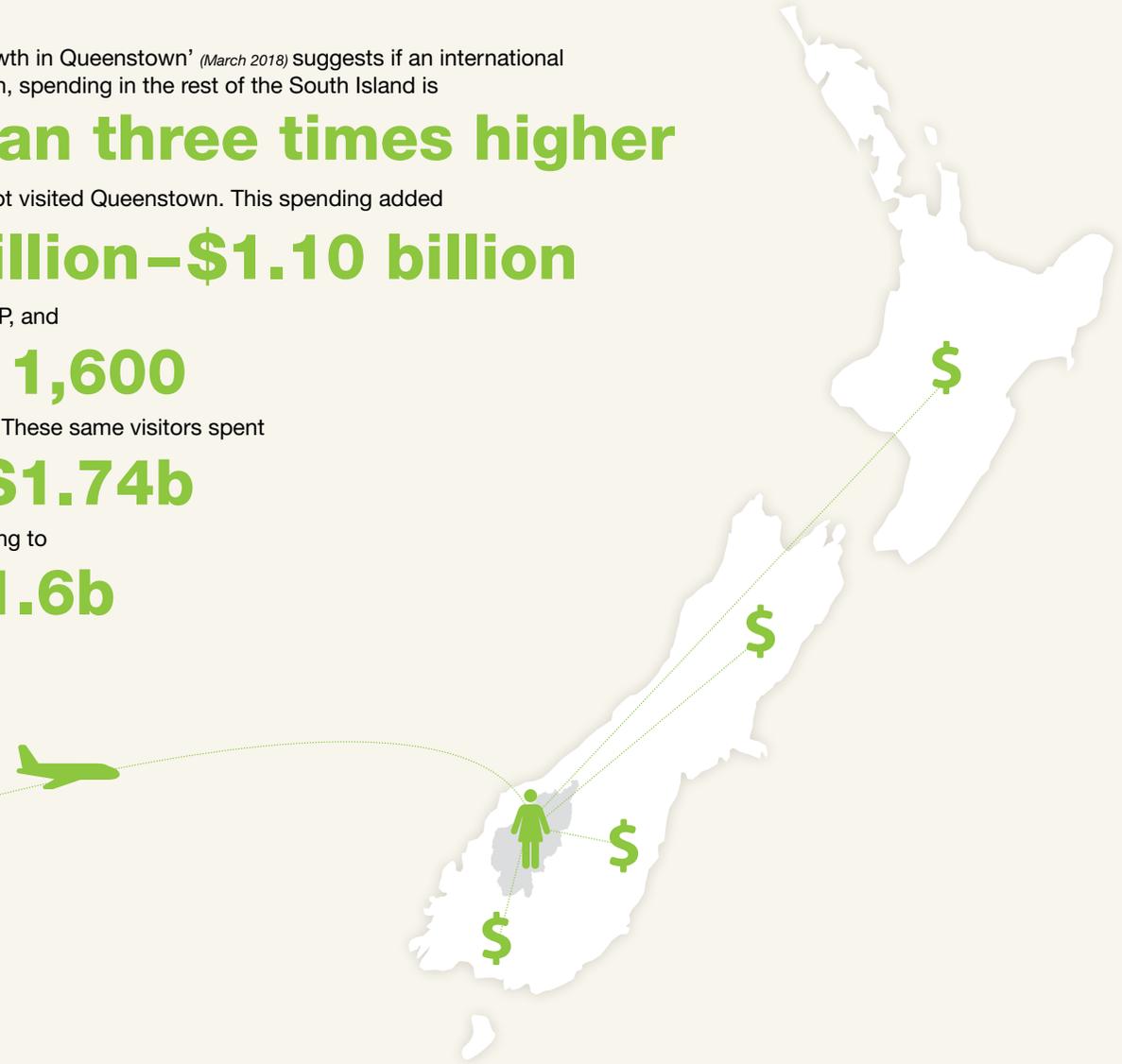
jobs in the South Island. These same visitors spent

**\$1.44 – \$1.74b**

per annum in NZ, equating to

**\$1.3 – \$1.6b**

in NZs overall GDP.



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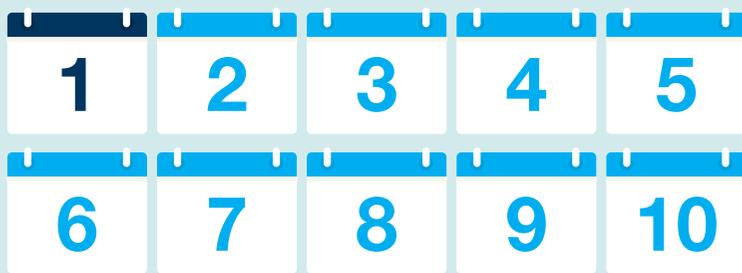
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# ...and were the jewel in New Zealand's crown.

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.

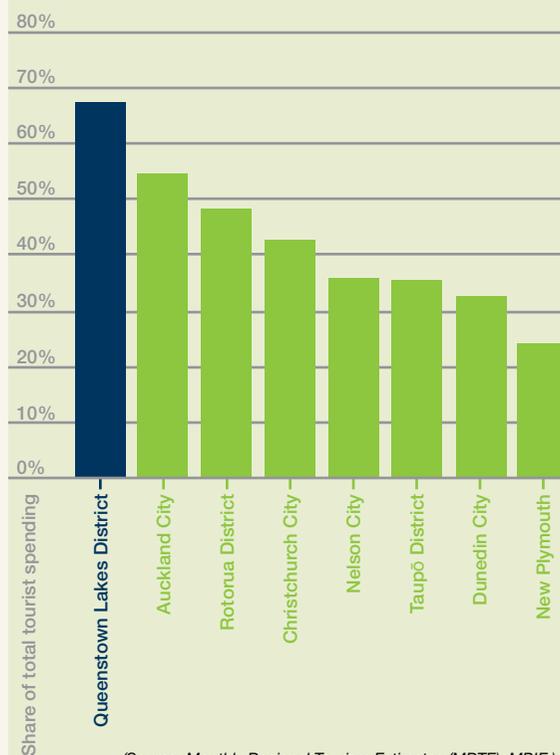
The 2019 '50 most beautiful cities in the world' list 2019 (survey of travel agents and bloggers) includes Queenstown - the only NZ city listed.

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



■ QUEENSTOWN

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



(Source: Monthly Regional Tourism Estimates (MRTE), MBIE.)

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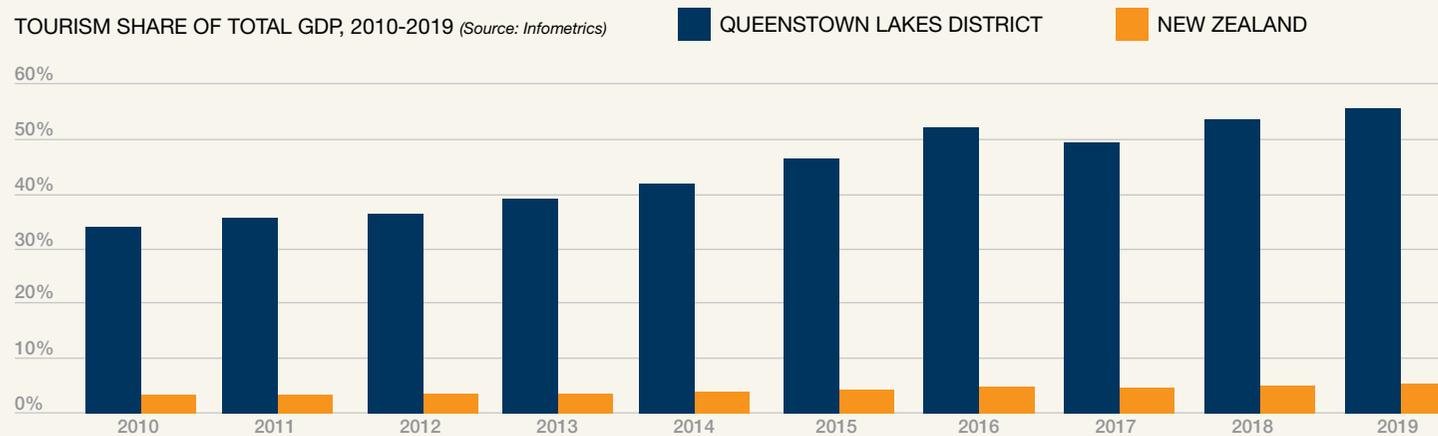
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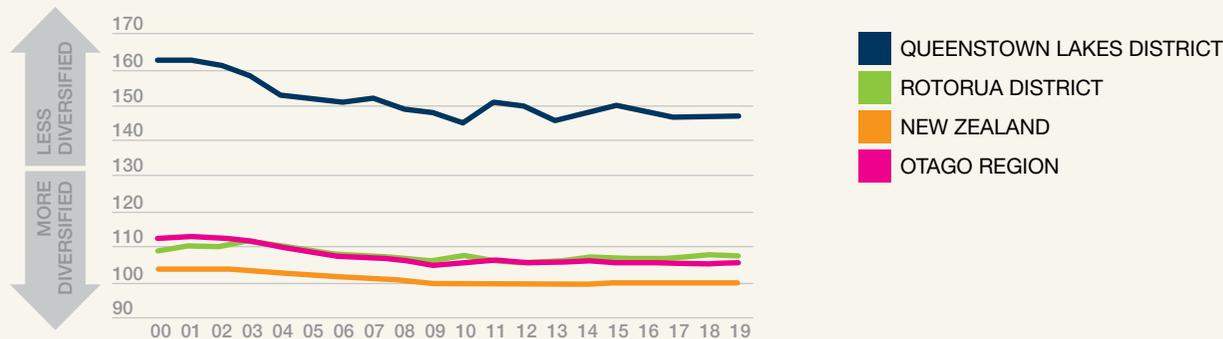
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# However, a lack of diversification left us exposed...

Tourism contributed \$1.7b out of a total \$3.062b in 2019, more than half our district's GDP and 63.5% of jobs (seven times higher than the NZ average of 9%).



DIVERSIFICATION FOR QUEENSTOWN-LAKES, OTAGO, ROTORUA AND NEW ZEALAND. EMPLOYMENT DIVERSIFICATION INDEX. ANZSIC LEVEL 1 INDUSTRIES, RELATIVE TO REBASING NZ TO 100 IN 2019 (Source: Benje Patterson)



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# ...and we were experiencing growing pains.

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

# 25%

of people said they had accessed a mental health service in the last 12 months (QoL 2018). The percentage is similar for the 2019 survey, with

# 24%

saying they had accessed mental health services through their doctor.

# 16%

of these respondents also said that someone else in their household was also accessing mental health services through their doctor.

# 10%

have accessed a counsellor or psychologist.

(Source: Quality of Life Survey 2018 and 2019)

## ECONOMIC

# 10%

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

(Source: Census 2013. Presented by Infometrics)

## ECONOMIC

The housing affordability index (the ratio of the average current house value to average annual earnings) shows that for Queenstown Lakes the index was 20.3,

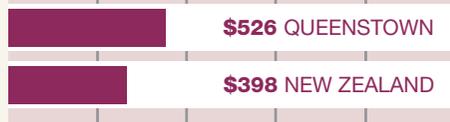
## double than the rest of New Zealand.

A higher ratio, suggests that median houses cost a greater percentage of incomes, meaning lower housing affordability.

## ECONOMIC

Average weekly rent at March 2018 was \$526 per week, compared to a national average of \$398 per week. The rental affordability index was 0.5, compared to 0.3 nationally.

\$300    \$600    \$900    \$1,200



## ECONOMIC

# 18%

of resident said they have no disposable income and a further

# 18%

have 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 are concerned or very concerned about the impact of climate change on the district.

# 30%

were satisfied or extremely satisfied with the steps council is taking to protect the environment.

(Source: Quality of Life Survey 2018)

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# When COVID-19 shut our borders, it cut off the bloodstream to the district...

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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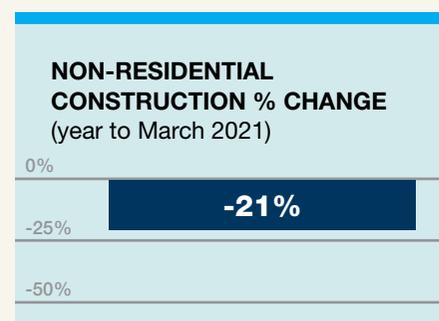
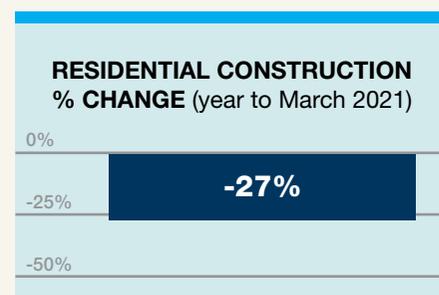
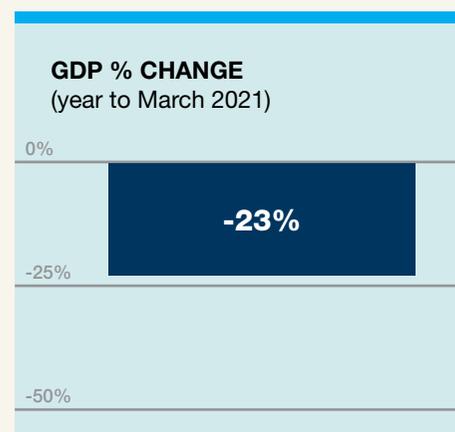
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# ...and it could get worse if we 'do nothing'.

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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# We are united by resilience and a desire to achieve more by working together.

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 2018 INCLUDED A NUMBER OF QUESTIONS REGARDING RESILIENCE AND FOUND THAT:



**97%**

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



**87%**

Have a good support network



**86%**

The majority agree that they are an optimistic person



**68%**

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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# 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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# ...and for recovery.

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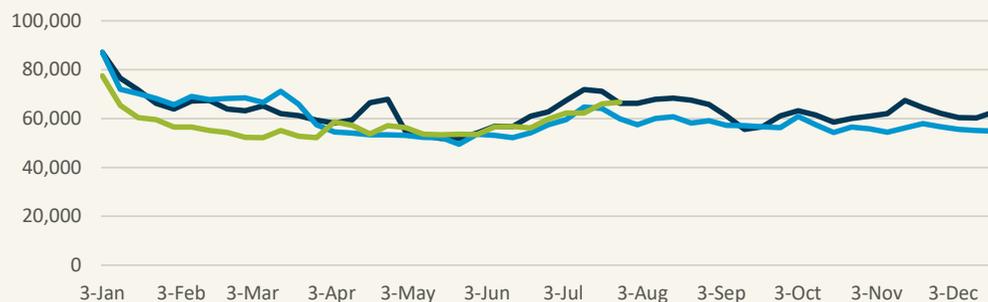
The following indicators will be updated quarterly, or when data is available.

## 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.

**TOTAL POPULATION**  
Queenstown Lakes District (DataVentures)  
Updated: 25th July 2021



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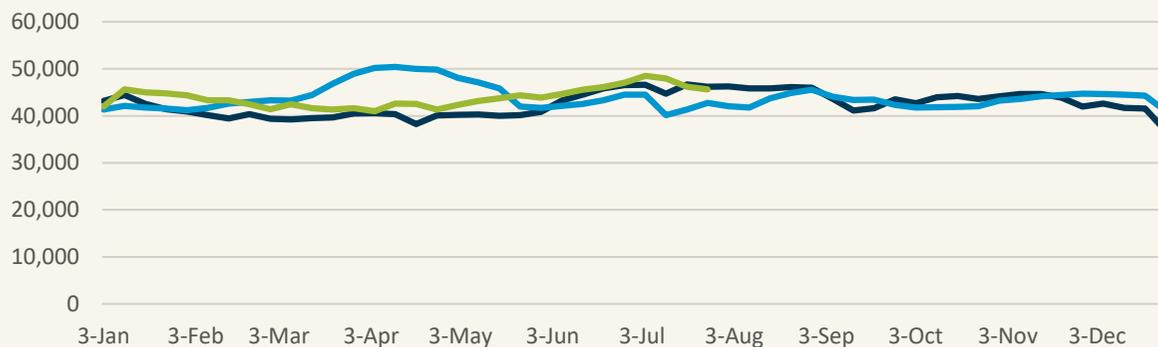
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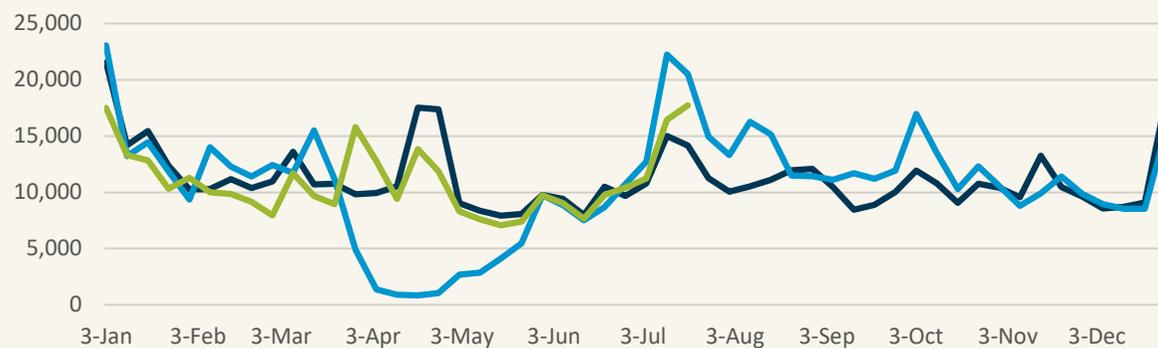
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**LOCAL RESIDENT POPULATION**  
 Queenstown Lakes District (DataVentures)  
 Updated: 25th July 2021



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



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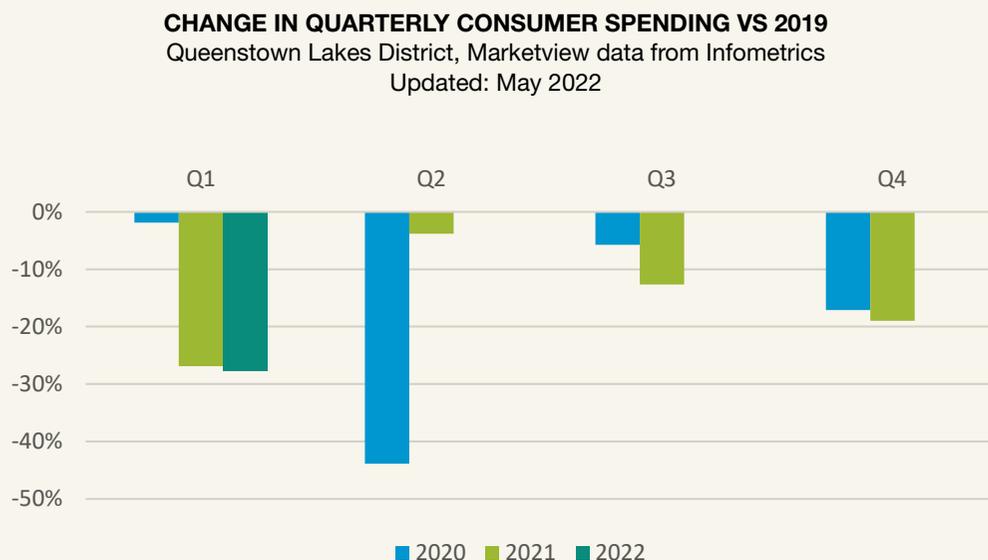
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## 2. CONSUMER SPENDING

Consumer spending for the first quarter 2022 was roughly on par with 2021 but still 28% below 2019 levels, and the lowest since the start of the pandemic. There were a range of factors that contributed to this including the Omicron outbreak and the country's red light traffic setting stifling domestic tourism. Year to date spending was up 7.6%, however this was only slightly above inflation suggesting sales volume was somewhat flat.



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 decreased sharply in April to 950,000, down 33% on March 2022 and 22% on April 2021. The House Price Index fell 5% but only to a similar level to what was seen at the end of last year. April saw 106 houses sold, lower than last year but still well above what we saw in 2019. With housing market momentum shifting nationwide due to rising mortgage rates, limited credit and high inflation, the next few months should give a better picture of the trends developing in our district.

Private sector rents continued to push upwards in March after remaining steady for much of the period post-COVID. The average rent in March was \$564, up 12% from a year ago but still below the period pre pandemic.

**REINZ HOUSE PRICE INDEX**  
Queenstown Lakes District  
Updated: May 2022

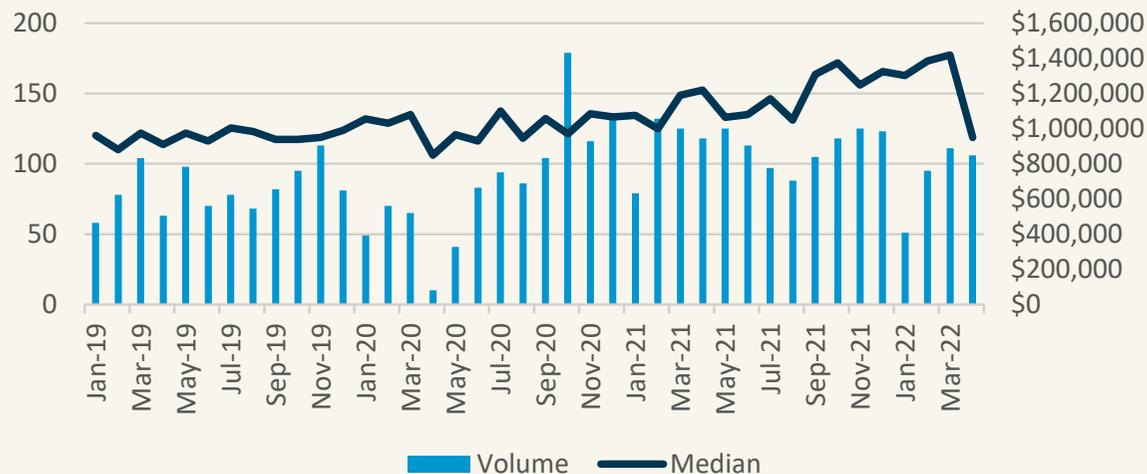


Data is sourced from the Real Estate Institute of New Zealand (REINZ) monthly reports. REINZ recommend monitoring the Housing Price Index (HPI), which was developed in partnership with the Reserve Bank of New Zealand and provides a more complete picture of the New Zealand housing market.

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### REINZ MEDIAN HOUSE PRICE VS VOLUME SOLD

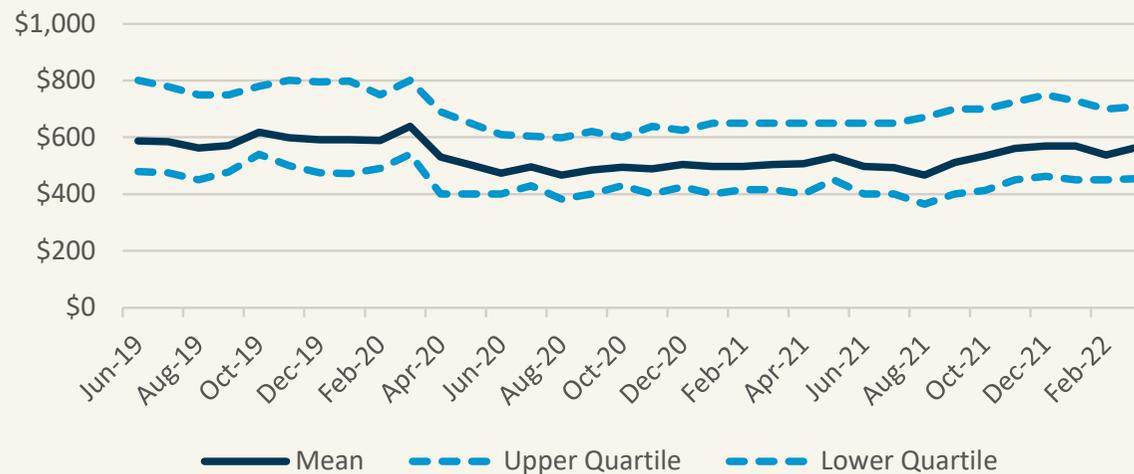
Queenstown Lakes District  
Updated: May 2022



Volume Median

### MBIE PRIVATE SECTOR RENTS

Queenstown Lakes District  
Updated: May 2022



Mean Upper Quartile Lower Quartile

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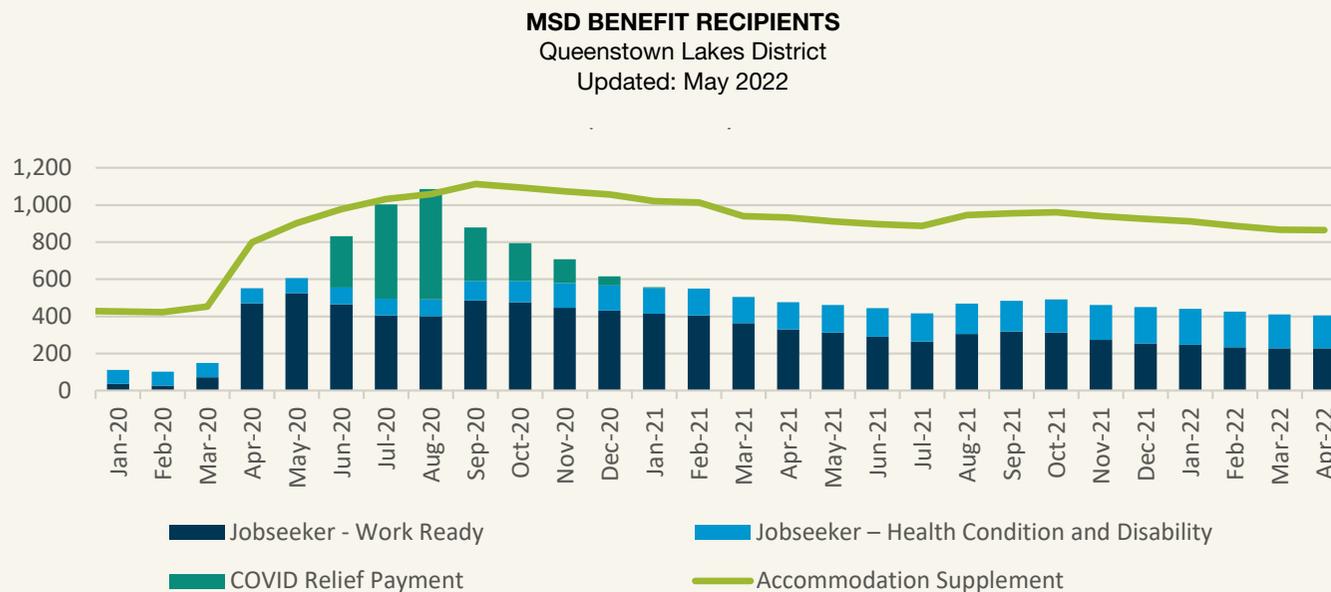
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#### 4. UNEMPLOYMENT

JobSeeker work ready numbers have continued to decline through 2022, down 31% on a year ago and 53% from their peak in Sep 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 apprehension around further outbreaks and traffic light settings, and difficulty in finding staff.



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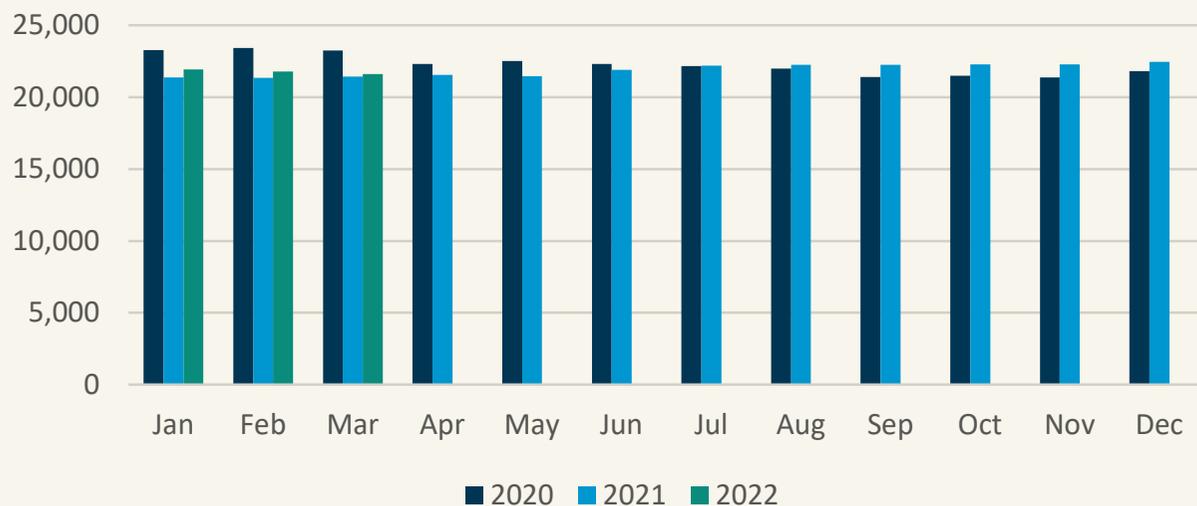
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## 5. FILLED JOBS

The number of filled jobs in the district increased by 1% in March 2022 compared to one year earlier. This was down 7% on March 2020, immediately prior to COVID-19. Accommodation and Food Services continues to be heavily affected, losing 353 jobs in the last year and 1,761 since 2020. Conversely, Construction increased 257 positions over the year and 460 since 2020. The last year has also seen an increase in Healthcare and Social Assistance roles along with Professional, Scientific and Technical Services.

**FILLED JOBS**  
Queenstown Lakes District  
Updated: May 2022. Source: StatsNZ.



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

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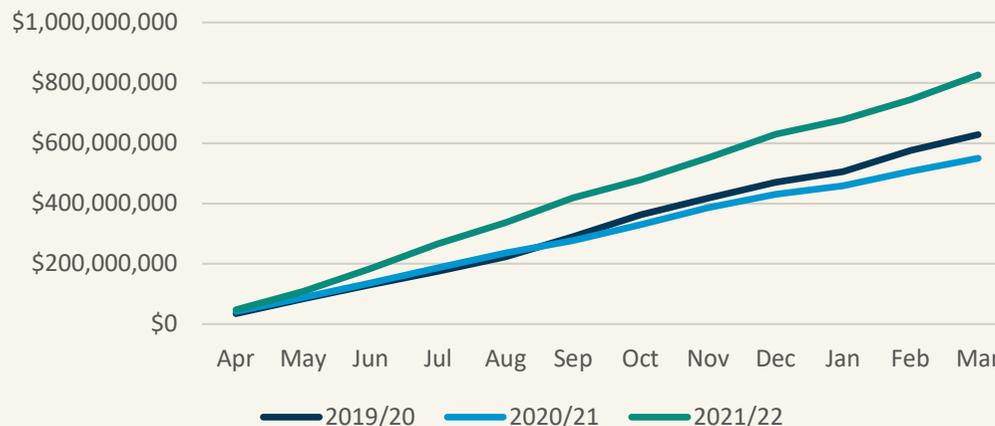
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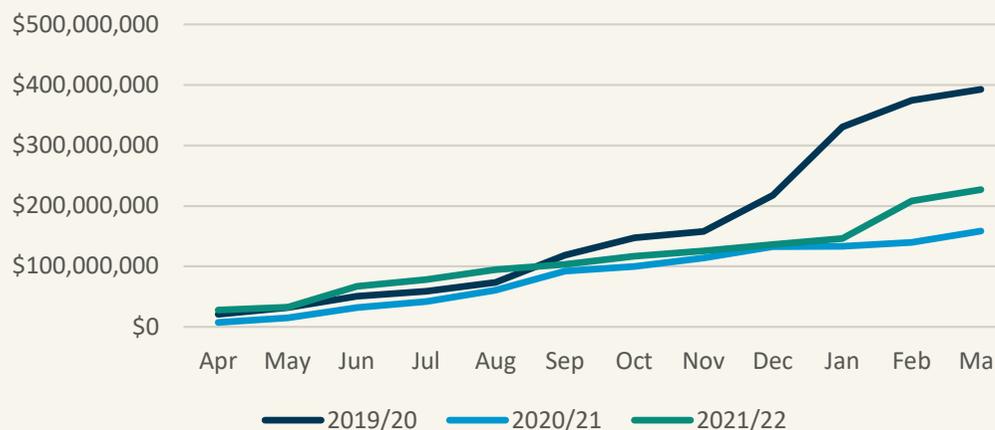
## 6. CONSTRUCTION CONSENTS

Construction consents are a leading indicator of future construction activity. The value of residential construction consents in the year ending March 2022 was \$826m, up 45% on the previous 12 months and well above the year ending March 2020. This compares to an increase of 24% nationwide. Non-residential construction consents were \$227m, well above 2021 but considerably down on 2020.

**RESIDENTIAL BUILDING CONSENTS - CUMULATIVE**  
Queenstown Lakes District  
Updated: April 2022. Source: QLDC.



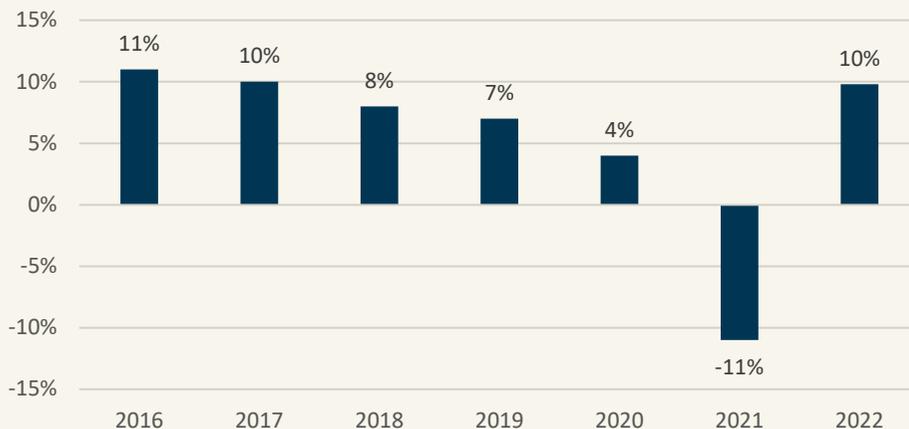
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### GDP % CHANGE (ANNUALLY, INFOMETRICS)

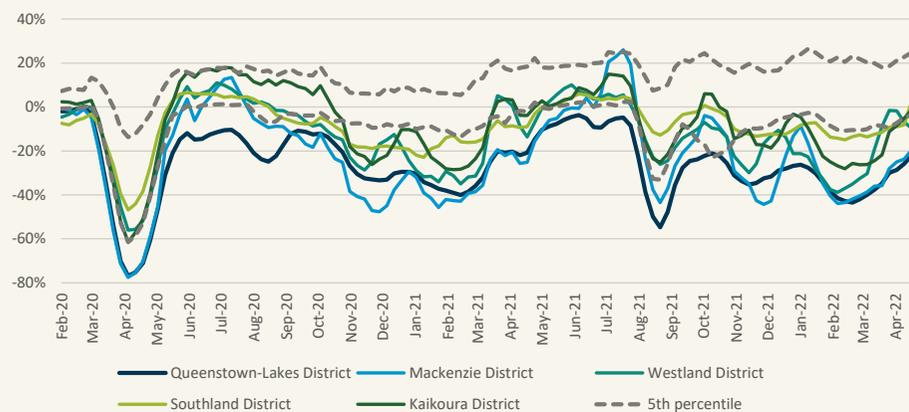
Updated: May 2022



### CONSUMER SPENDING BY TERRITORIAL AUTHORITY

MarketView Data, from mbie.govt.nz

Updated: May 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](http://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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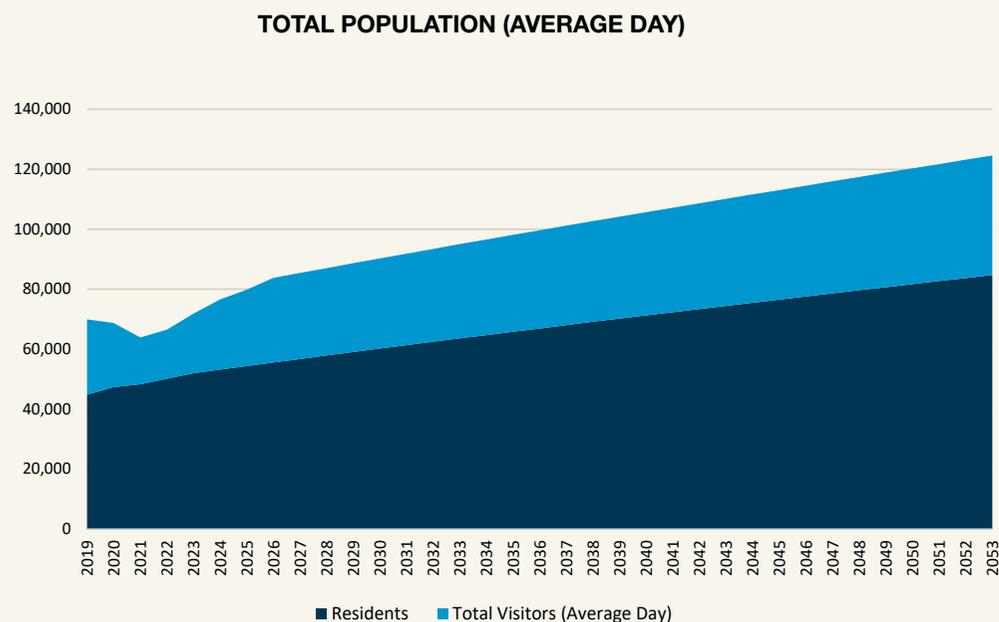
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# Ultimately, these outcomes matter because what made the district a jewel before, remains.

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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