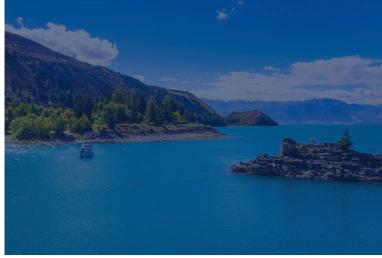
Queenstown Lakes District Council

Quality of Life Report 2019

Versus
RESEARCH

Project Background



OBJECTIVES

Queenstown Lakes District Council (QLDC) is the local area authority for the Queenstown Lakes district. QLDC along with other community partners are responsible for the delivery of services to residents within the area.

QLDC has been gauging residents' satisfaction with various key services and facilities since 1995. In 2018, QLDC opted to base their research around determining how residents in the district view their quality of life. To this, QLDC wants to draw relevant data which will help them and other community partners to improve the quality of life throughout the district. This is the second year that the Quality of Life Survey has been completed.

The primary objectives guiding this project were to:

- Understand the impact of the increasing population and tourist numbers in the district;
- Determine measures of overall quality of life within the district;
- Understand what role QLDC and their partners could play in helping to improve residents quality of life within the district.

METHOD

Versus Research (Versus) was commissioned by QLDC to complete a quantitative survey with Queenstown Lakes residents.

Residents' contact details were obtained via the electoral roll, doing so ensured access to a variety of residents throughout the district, not just ratepayers. A total of n= 10,000 residents were selected at random to participate in the survey. Each of those selected were sent a letter where they were allocated a unique ID code and invited to participate in the survey online.

Alongside the electoral roll sample, QLDC employed some additional measures to generate participation. These measures included advertising the survey link on social media platforms as well as utilising relationships with various community partners. These actions were to ensure a range of demographic groups participated in the survey.

Any resident unable or unwilling to complete the survey online was able to request a paper copy. On request, a paper copy was sent out and upon completion, freeposted back to Versus for inclusion in the final dataset.

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

SAMPLE

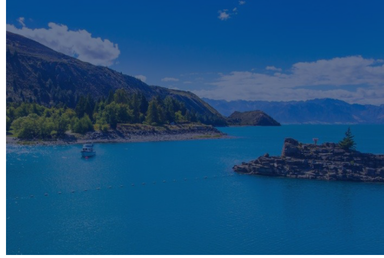
A total of n= 2,037 completed surveys were received. This was rounded down to a final sample size of n= 1,246 where a total of n= 1,000 were residents and n= 246 non-resident ratepayers.

Please note that this report contains the results of residents only however, the results of non-resident ratepayers are reported separately.

MARGIN OF ERROR

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

Project Background



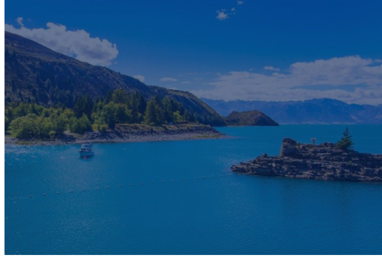
WEIGHTS

Age weightings have been applied to the final data set. Weighting is a common practice in research and is used to ensure demographic groups are neither under nor over-represented in the final data set. That is, each demographic group proportionately reflects the demographic make-up of the Queenstown Lakes population.

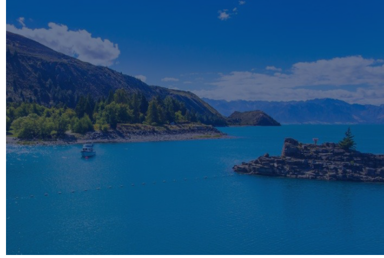
The weighting proportions were taken from the 2018 Census. These proportions are outlined in the table below:

AGE	%
18-29	26%
30-44	33%
45-64	28%
65+	13%

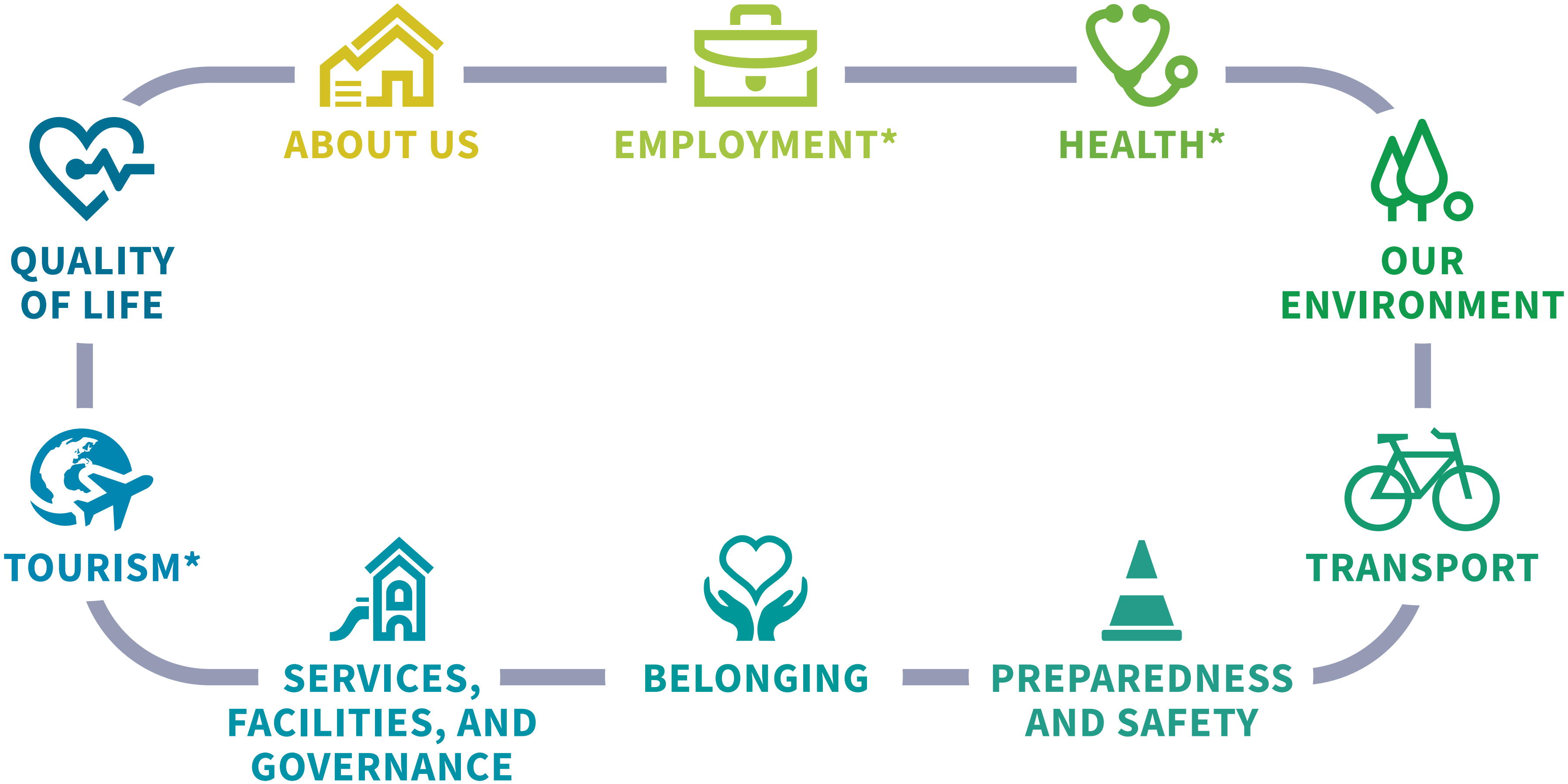
Contents



How to Read this Report



This report has been split into 10 sections as illustrated below. Sections have remained as consistent as possible to 2018 however due to new questions, there are additional sections. These sections news section have been identified below with an asterisk (*). All base sizes are n= 1000 unless otherwise indicated. Where results are shown in charts, data labels of less than 3% are not shown due to the overlapping labels making it difficult to read. Year on year comparisons have been completed where the questions and measures are the same as 2018. Please also note that due to rounding, not all percentages add to 100%.



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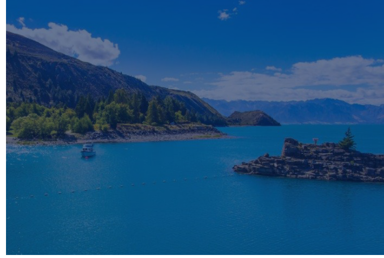
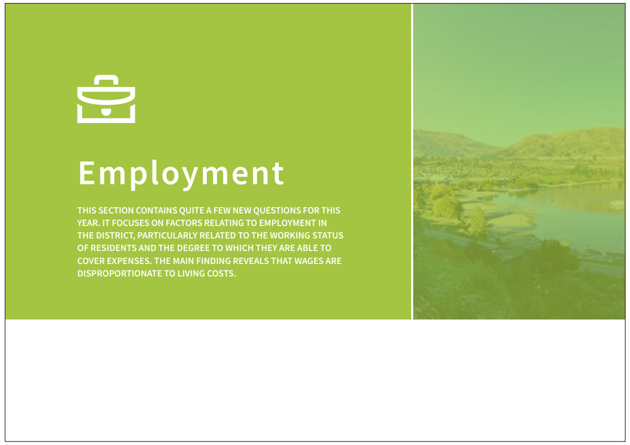
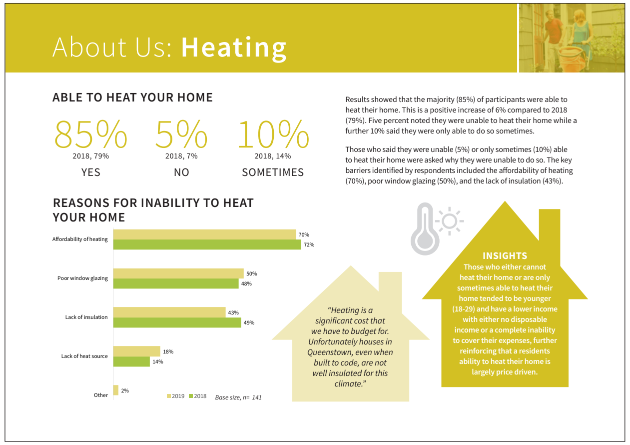
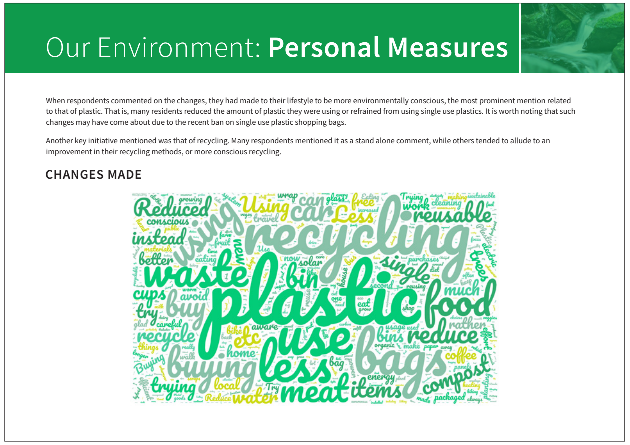








NEW SECTIONS

Due to the inclusion of new questions for the 2019 Quality of Life Survey, this year's report has seen the addition of new sections. The new sections added for 2019 include Employment, Health, and Tourism. Please note that the sections labelled 'belonging' and 'services, facilities and governance' do not correspond with their section labels in 2018.

INSIGHTS

Interesting findings or quotes have been included on relevant pages. These are presented in coloured icons or on a stand alone page to validate results or show trends among particular groups. In some instances, significance testing has been done. Significance testing reveals whether there is a statistically noteworthy difference between the total result and the result of a specific group. Phrases such as 'more likely' indicate that an observed result is significantly higher than the total result whereas phrases such as 'less likely' indicate that an observed result is significantly lower than the total result. Phrases such as 'although not significant…' highlight that an observed result is not statistically significant but still reflects a high or low proportion of respondents.

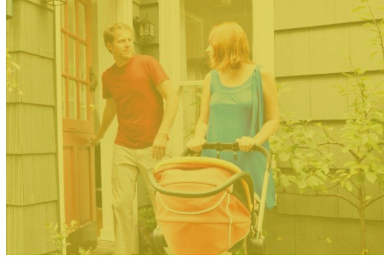
WORD CLOUDS

Where useful word clouds have been used in this report to convey verbatim responses. Word clouds are a tool used to visually present text data and identify word frequencies across a range of verbatim responses. The more frequent a word is cited, the larger and bolder the word appears in the word cloud. On the contrary, words that are small indicate that the observed word is repeated less frequently by participants.

About Us

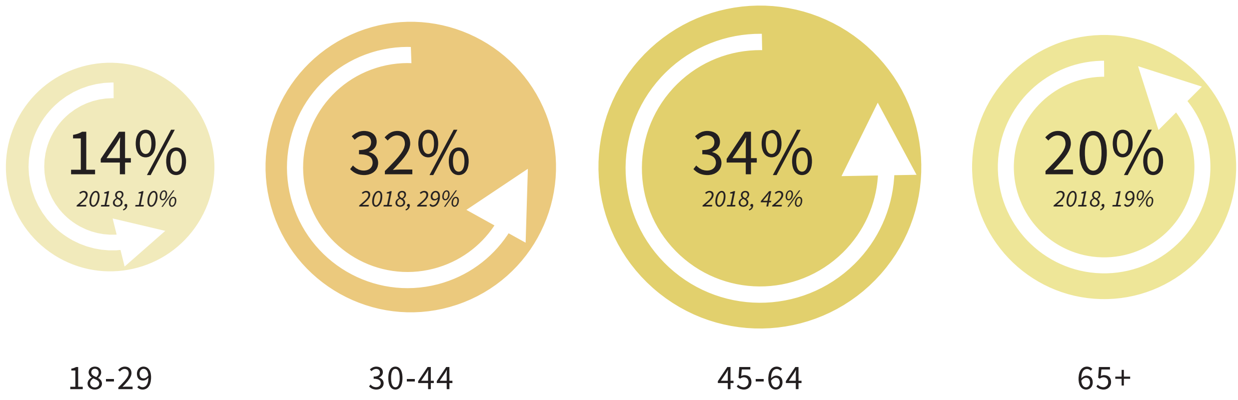
THIS SECTION FOCUSES ON THE DEMOGRAPHIC AND SOCIAL STRUCTURE OF THE QUEENSTOWN LAKES DISTRICT. PARTICULAR FOCUS IS GIVEN TO HOUSING AND THE LIVING SITUATION OF RESIDENTS. RESULTS SHOW THAT THE KEY ISSUE FACING RESIDENTS IS THE PRICE OF HOUSING AS WELL AS THE IMPACT THAT INFRASTRUCTURAL DEVELOPMENT IS HAVING ON THE DISTRICT.

About Us: **Our District**

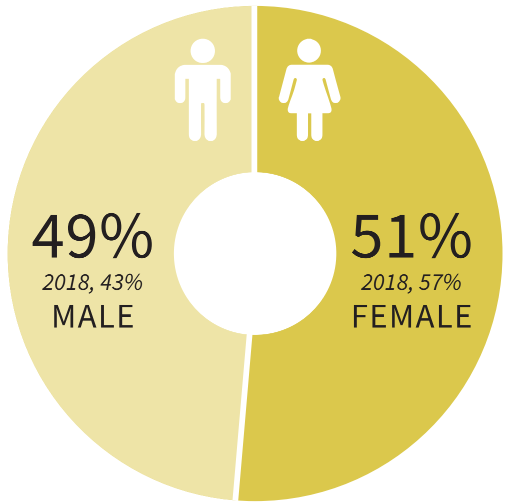


Thirty four percent of respondents indicated that they were aged between 45-64 years, while over half identified as female (51%). A slightly higher portion of younger people participated in 2019. Please note that these results are for the unweighted sample.

AGE

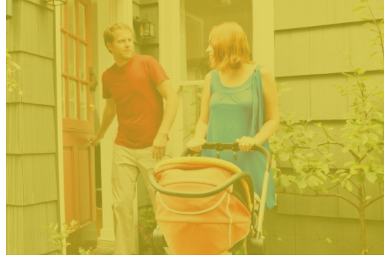


GENDER*



**Please note that n= 3 respondents classified as gender diverse. This resulted in 0% of the total sample size.*

About Us: **Our District**



The highest proportion of residents had an annual household income of $100,001-$200,000 (28%). Ninety one percent of respondents identified as European/ Pākehā and 64% of respondents were born in New Zealand. Please note that these results are unweighted

ETHNICITY**

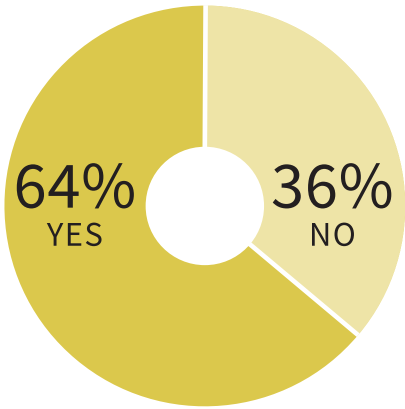
91%
2018, 87%
EUROPEAN/ PĀKEHĀ

2%
2018, 2%
MĀORI

6%
ETHNIC MINORITIES

2%
OTHER ETHNICITY

BORN IN NEW ZEALAND



INCOME

9%
2018, 15%
UNDER $40,000

15%
2018, 18%
$40,001-$60,000

13%
2018, 17%
$60,001-$80,000

13%
2018, 12%
$80,001-$100,000

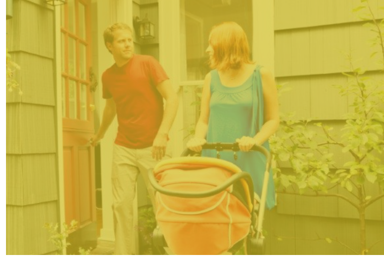
28%
2018, 24%
$100,001-$200,000

12%
2018, 7%
$200,000+

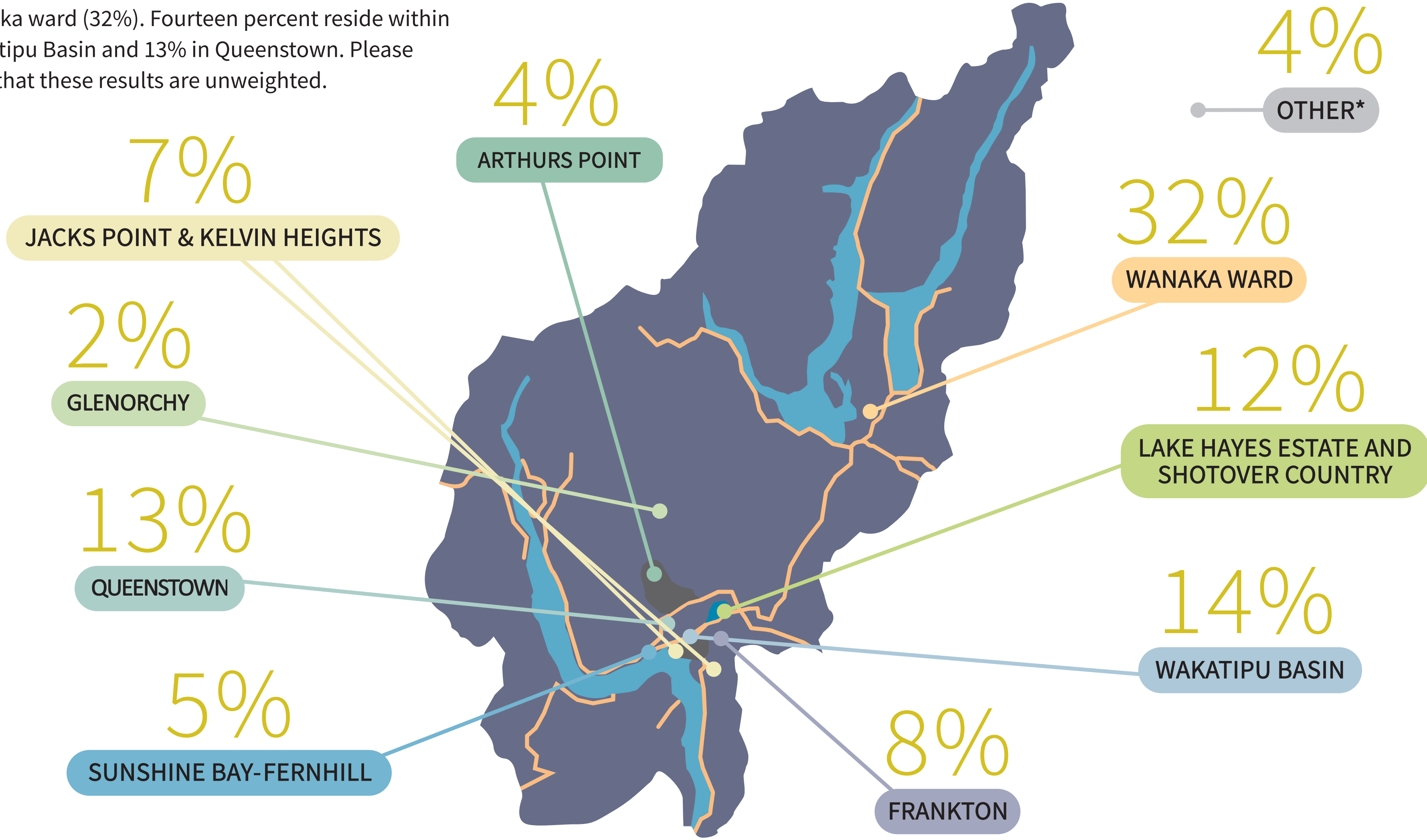
9%
2018, 7%
PREFER NOT TO SAY

***Please note that the 2018 survey did not include an 'ethnic minority' category as this was included in 'other'. A year on year comparison is unable to be completed for these cateogries.*

About Us: **Neighbourhood Overview**

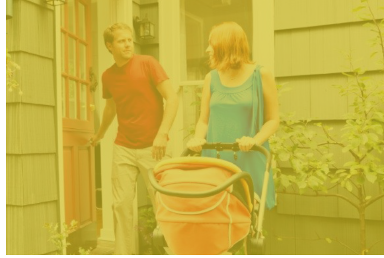


Nearly three quarters of respondents reside in the Wanaka ward (32%). Fourteen percent reside within Wakatipu Basin and 13% in Queenstown. Please note that these results are unweighted.



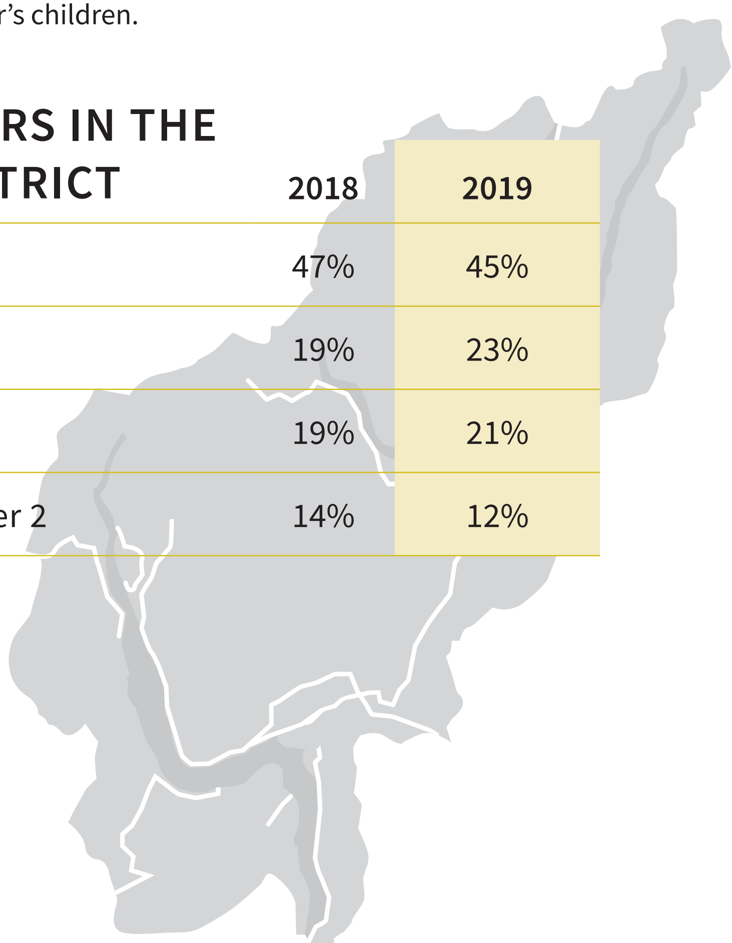
*This is a combination of all area groups with less than 20 respondents

About Us: **Residing in the District**



Residents were asked how many years they have lived in the district. One third (33%) have lived in Queenstown Lakes District for less than 5 years, a further 23% for 5-9 years, and 45% for more than 10 years.

Nearly three quarters (73%) of participants indicated that they lived with their partner or spouse, while 30% said that they lived with their children or their partner's children.



YEARS IN THE DISTRICT

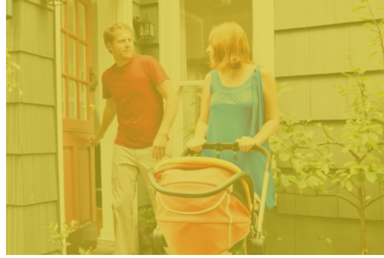
	2018	2019
10+	47%	45%
5-9	19%	23%
2-4	19%	21%
Under 2	14%	12%

WHO LIVES IN YOUR HOUSEHOLD?

	2018	2019
Partner/spouse	73%	73%
Children and/or partner's children	32%	30%
Other unrelated children/adults	26%	19%
Other relative	3%*	6%
Parent/s	6%	8%
Parent's partner	N/A	1%
Live alone	3%	4%

**This is the combined 'other family relative' and 'siblings' from the 2018 results.*

About Us: **Our Homes**



Findings showed that the majority (64%) of respondents owned their home while 32% of respondents either rented a whole space (20%) or rented a room (12%). Of the participants who rented in some form, 22% had less than 1 year remaining on their rental agreement, a further 36% had 1-2 years, 5% had 3-4 years, 15% had more than 5 years, and 22% were unsure.

OWN OR RENT?

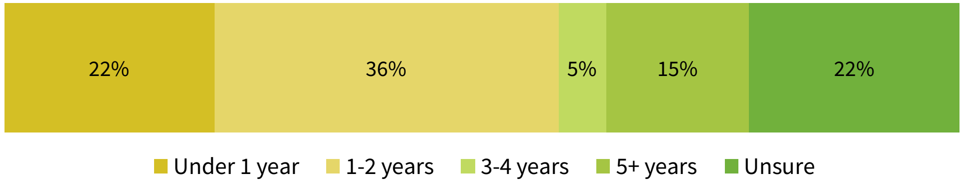
64%
OWN

20%
RENT WHOLE SPACE

12%
RENT A ROOM

5%
OTHER

LENGTH OF RENTAL AGREEMENT



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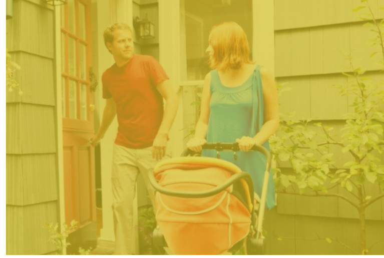
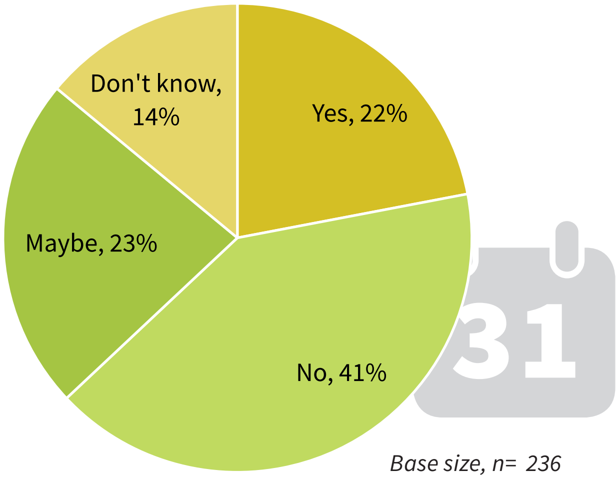
About Us: **Our Homes**



Of those who rent, 22% indicated that they needed to move within the next 12 months. Key reasons included the expiration of their lease (66%), change of circumstances (11%), and the intent of purchasing a property (10%).

Sixteen percent of those who rented said that they needed to move at specific times of the year (9%), or that they were sometimes required to do so (2%).

NEED TO MOVE WITHIN THE NEXT 12 MONTHS



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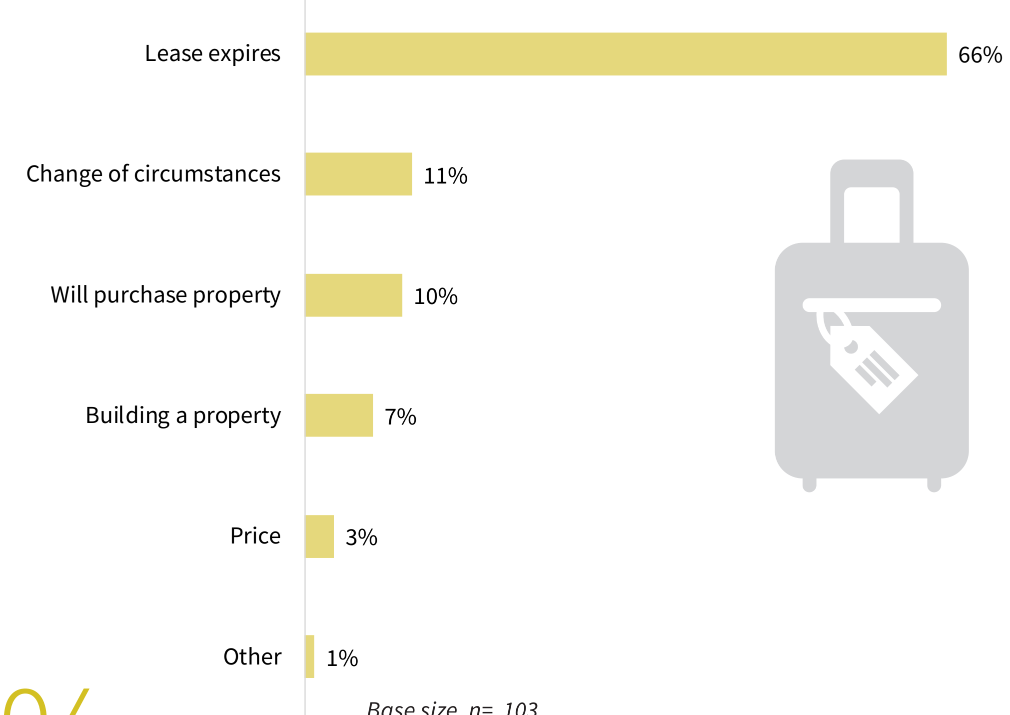
MOVING INFLUENCERS



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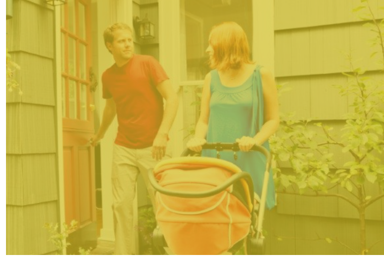
NEED TO MOVE AT SPECIFIC TIMES

9%	81%	2%	7%
YES	NO	SOMETIMES	DON'T KNOW

Base size, n= 236

About Us: **Lodgements**



Respondents were asked whether they supplemented their income through lodging or Airbnb style accommodation. Twelve percent of respondents said they did or sometimes did so through lodging, while 88% did not. Ten percent did so through Airbnb, while 90% did not.

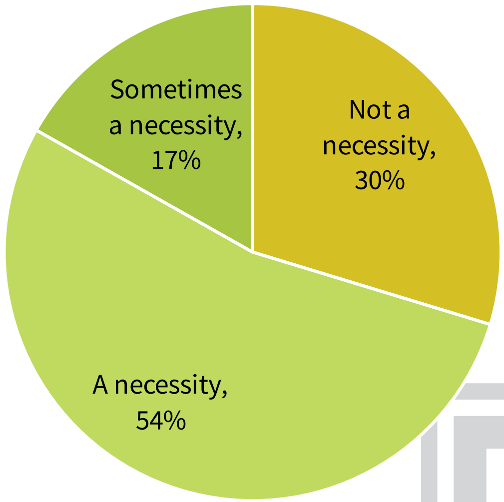
Of those who said they supplemented their income through these measures, 30% said the extra income was not a necessity, over half (54%) said it was a necessity, and 17% said it was a necessity sometimes.

SUPPLEMENT INCOME THROUGH LODGING OR AIRBNB

12% LODGER (Yes/sometimes)

10% AIRBNB (Yes/sometimes)

NECESSITY OF EXTRA INCOME



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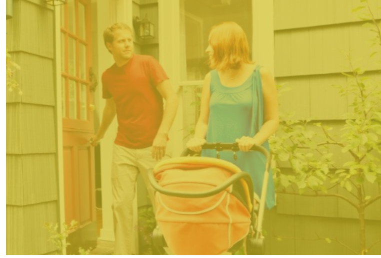
About Us: **Heating**



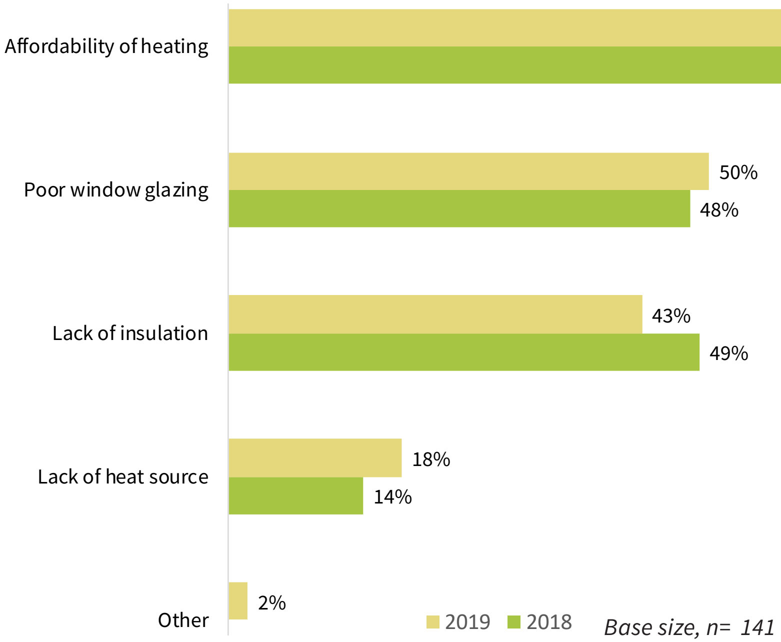
ABLE TO HEAT YOUR HOME

85%	5%	10%
2018, 79%	2018, 7%	2018, 14%
YES	NO	SOMETIMES

Results showed that the majority (85%) of participants were able to heat their home. This is a positive increase of 6% compared to 2018 (79%). Five percent noted they were unable to heat their home while a further 10% said they were only able to do so sometimes.

Those who said they were unable (5%) or only sometimes (10%) able to heat their home were asked why they were unable to do so. The key barriers identified by respondents included the affordability of heating (70%), poor window glazing (50%), and the lack of insulation (43%).

REASONS FOR INABILITY TO HEAT YOUR HOME

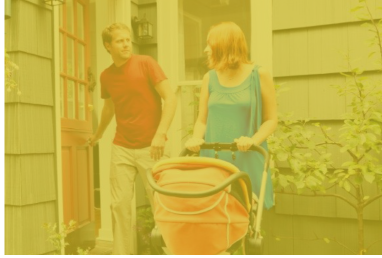


"Heating is a significant cost that we have to budget for. Unfortunately houses in Queenstown, even when built to code, are not well insulated for this climate."

INSIGHTS

Those who either cannot heat their home or are only sometimes able to heat their home tended to be younger (18-29) and have a lower income with either no disposable income or a complete inability to cover their expenses, further reinforcing that a residents ability to heat their home is largely price driven.

About Us: **Summary**



The profile of residents show similar demographic trends to last year with a positive increase in the number of younger respondents. This section highlighted that cost or pricing tended to be a consistent theme. That is, people intended to leave the district predominantly due to living costs, and over half of the residents who lodged their home did so out of a necessity to supplement their income. Of those who were unable to heat their home, the cost of doing so was the main barrier, while those on lower incomes were more likely to be exposed to such issues. Costs and pricing particularly related to housing was a theme further revealed and explored in the open-ended comments provided by respondents.

Many respondents expressed that the cost of renting was too expensive:

"The price of weekly rent is overpriced and unrealistic for the working class based on the Wanaka median income."

"Rental prices are astronomical for working class people…"

Many comments referenced that Airbnb style accommodation is the key reason behind such expensive rent. While comments did not elaborate as to why, the assumption is that the ease and convenience of Airbnbs for landlords, matched with a high demand due to tourist growth is more appealing than renting their property out.

"The housing/rental market has been ruined by Airbnb."

"The pricing for rentals is extortionate! Mostly due to the rapid increase of Airbnb's."

Other participants expressed their concern around the price of building or owning a home. Residents who owned their own home even shared concern for their fellow residents who will be unable to follow suit.

"We are lucky that we bought our house 31 years ago. We could never work in town and expect to buy a house today."

"Too expensive. I will never be able to buy in this area."

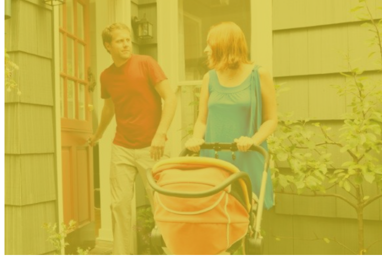
"Having lived 12 years in the Queenstown campground, I am very aware many people/residents in our district can in no way afford to buy their own home, ourselves included."

Another key theme related to over development within the area. Residents felt that section sizes were becoming smaller and that the area is becoming too urbanised.

"I do not support the reduction in section size that we see with the new subdivision… with many unoccupied homes in the town of Wanaka, the urban creep is a disaster benefitting a few developers only…"

"There is too much sprawl taking place in the countryside. There should be more residential development in the CBD/urban areas."

About Us: **Summary**



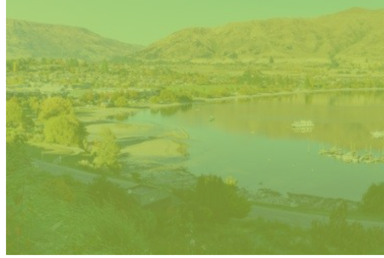
"The beauty of Queenstown is being ruined... and it appears to be unregulated by housing developments."

"Put a cap on building as we are being overrun with too much development."

The vast majority of comments made regarding housing in the district in one way or another came down to either cost or over-development. Most interesting is many comments made about the cost of living were in fact those who owned their own home already, though they expressed sincere concern about the ability of other residents in the district to experience the same luxury.

Employment

THIS SECTION CONTAINS QUITE A FEW NEW QUESTIONS FOR THIS YEAR. IT FOCUSES ON FACTORS RELATING TO EMPLOYMENT IN THE DISTRICT, PARTICULARLY RELATED TO THE WORKING STATUS OF RESIDENTS AND THE DEGREE TO WHICH THEY ARE ABLE TO COVER EXPENSES. THE MAIN FINDING REVEALS THAT WAGES ARE DISPROPORTIONATE TO LIVING COSTS.

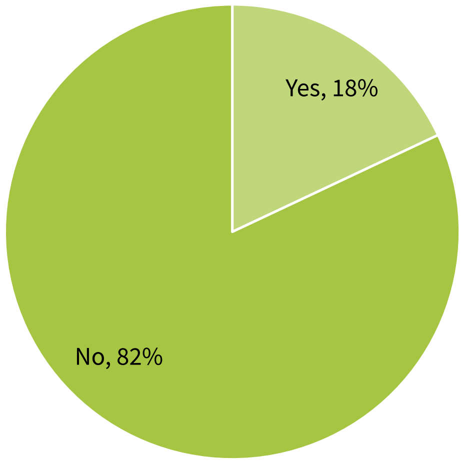


Employment: **Income & Needs**

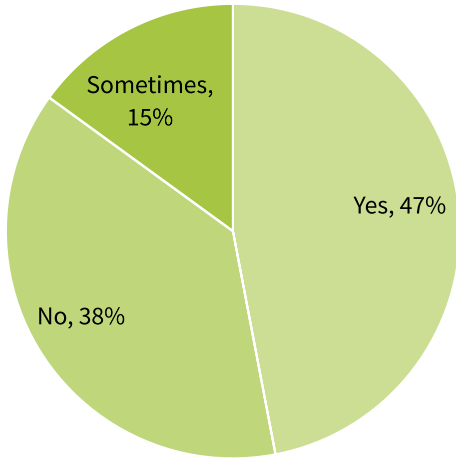
Respondents were asked to identify the level of disposable income they had left after covering their expenses. Thirty four percent had a sufficient level of disposable income remaining, 48% had some left, 15% had none, and 3% could not even cover their expenses. Positively, 2019 saw an increase of 8% of those with a sufficient level of disposable income (2018, 26%) and a decrease of 6% of those with no disposable income (2018, 21%).

Eighteen percent of participants indicated they had more than one paid job. Of those that had additional paid work, 47% indicated they required the additional income, while 15% only required it sometimes.

MORE THAN ONE PAID JOB



REQUIRE SECOND JOB



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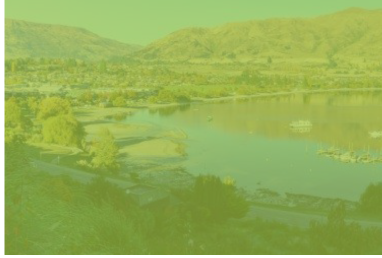
INCOME TO NEEDS RATIO*	2018	2019
Sufficient level of disposable income	26%	34%
Some disposable income	49%	48%
No disposable income	21%	15%
Cannot cover my expenses	3%	3%

"Incomes don't keep pace with living costs, particularly housing."

"I have a full time job then have to work another job just to survive here..."

* *Please note prefer not to say has been removed and percentages re-proportioned accordingly.*

Employment: **Insights**



18-29:

Results revealed that while those aged 18-29 were significantly more likely to be in full time paid employment, they were significantly less likely to have a sufficient level of disposable income. Indeed, this group was proportionately more likely to be employed by the hospitality and tourism sector, thus suggesting the low earning capabilities of workers within this industry.

30-44:

Similar to those aged 18-29, those aged 30-44 were less likely to have a sufficient level of disposable income yet were more likely to work in a full time paid position. This theme suggests that securing a full time position within the district does not correspond with a sound income. In fact, the highest need of an additional form of income was seen among those aged 30-44. This group was more likely to be stay at home caregivers implying that any need for an extra income is driven by a need to survive with the corresponding responsibilities of dependants.

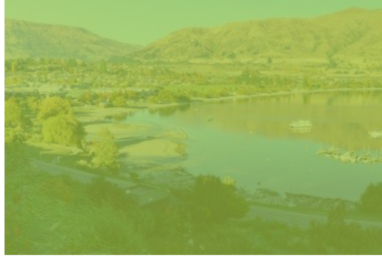
45-64:

Findings showed that a higher proportion of those aged 45-64 had more than one paid job and were more likely to work in a part time paid role or be self employed. Interestingly, results revealed that this group was significantly more likely to have a sufficient level of disposable income, thus suggesting that their additional forms of paid employment were not necessarily in a pursuit to assist with living.

65+:

Those aged 65 and older were more likely to have a sufficient level of disposable income. As expected, this age group was more likely to be retired and as a result, were more likely to engage in volunteer work as they were more time flexible.

Employment: **Insights**



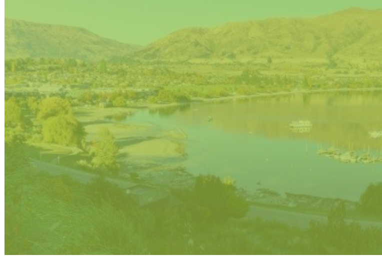
FEMALE:

Females were significantly less likely to have a sufficient level of disposable income and, while not statistically significant, a higher portion of females tended to have more than one paid job. Females were more likely to be in part time paid employment or to be caring for children, perhaps best explaining the lower levels of income among this demographic. Women tended to work in more admin-based positions, healthcare, and education.

MALE:

Male respondents were significantly more likely to have a sufficient level of disposable income and to be self employed. Males were more likely to be working in construction or transport, postal, or warehousing industries.

Employment: **Insights**



EUROPEAN/PĀKEHĀ:

Results suggested that Europeans and Pākehās tended to be more economically prosperous when compared to other ethnic groups. This was particularly highlighted via income to needs ratio where Europeans and Pākehās were significantly more likely to have sufficient levels of disposable income. These respondents were also significantly less likely to be unemployed.

ETHNIC MINORITIES:

Those grouped under ethnic minorities were significantly more likely to have no disposable income and to care for children. While not significant, ethnic minorities had the lowest proportion of respondents who had more than one paid job, yet of those who did have other paid jobs, they had the highest proportion of participants that required the supplementary form of income.

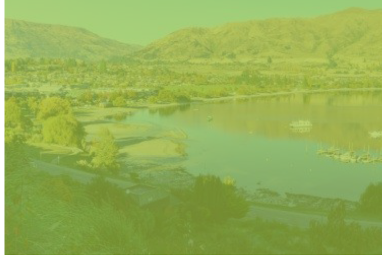
MĀORI:

Although not significant, Māori had the highest proportion of respondents with more than one paid job, yet of those that had more than one paid job, Māori also had the lowest proportion of respondents that required the additional form of income. Interestingly, results also revealed that Māori were significantly more likely to be unemployed.

OTHER ETHNICITY:

No key trends were identified among the 'other' ethnic group however, almost half of this group indicated that once they covered their expenses, they had some disposable remaining, over one third were employed in a full time paid capacity, and over one third worked in the hospitality and tourism sector.

Employment: **Working Status**



Forty seven percent of participants noted they were in full time paid employment, thirteen percent in part time paid employment, while 18% were self employed. The key industries with which respondents were employed, included tourism and hospitality (28%), professional, scientific, and technical services (14%), and construction (10%).

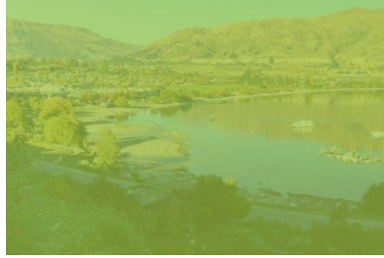
WORKING STATUS*	2018	2019
Full time	45%	47%
Part time paid	16%	13%
Self employed	28%*	18%
Caring for children	18%	3%
Volunteer work	18%	2%
Retired	N/A	13%
Other	N/A	3%

KEY INDUSTRIES	2018	2019**
Tourism and hospitality	24%	28%
Professional, scientific, and technical services	10%	14%
Construction	9%	10%
Public administration and safety	3%	8%
Education and training	8%	8%
Retail trade	8%	7%
Administration and support services	7%	6%
Health care and social assistance	7%	5%
Arts and recreation services	4%	5%
Agriculture, forestry, and fishing	5%	4%

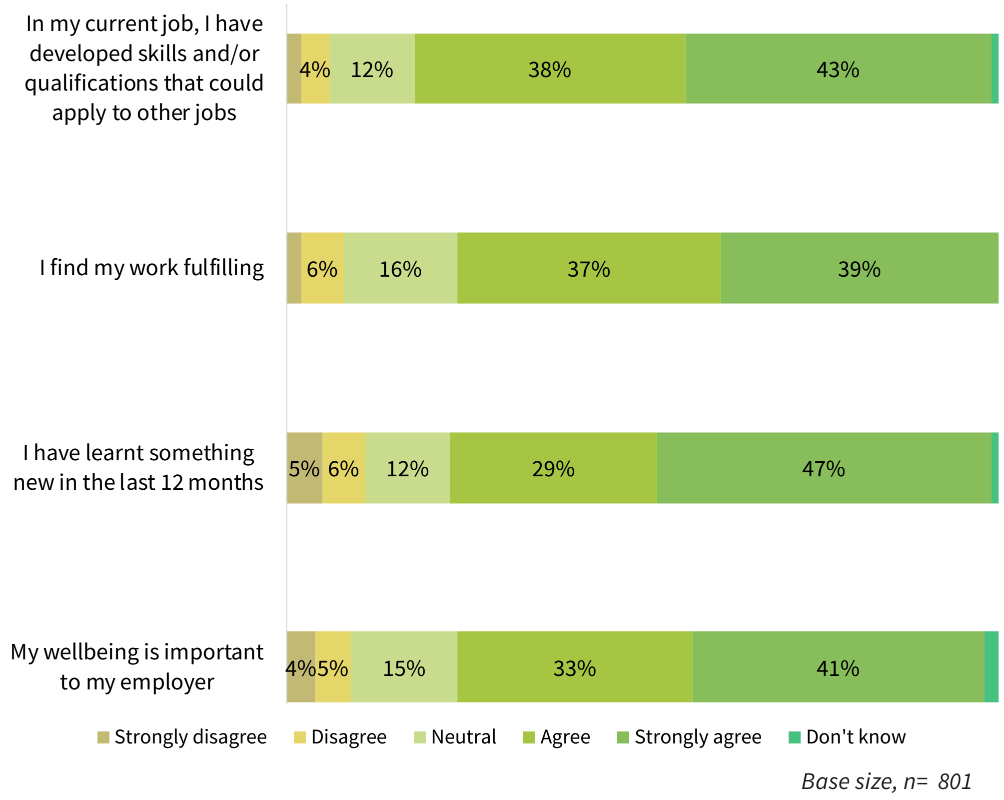
**Please note that self employed and volunteer work were measured as full time and part time separately for 2018. The 2018 results shows the aggregate percentage.*

***Please note only industries with a response rate of 4% and higher are shown.*

Employment: **Job Satisfaction**



JOB SATISFACTION



Eighty one percent of respondents either agreed (38%) or strongly agreed (43%) that they have developed skills or qualifications that are adaptable, 76% of participants noted that they agreed (29%) or strongly agreed (47%) that they have learnt something new in their role within the last 12 months, 76% either agreed (37%) or strongly agreed (39%) that they find their work fulfilling, while 74% either agreed (33%) or strongly agreed (41%) that their wellbeing is important to their employer.

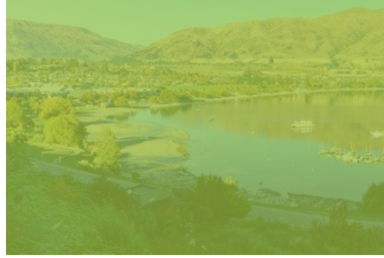
INSIGHTS

Those with a high income of more than $200,000 were more likely to strongly agree that their work was fulfilling (17%) and, that they have developed adaptable skills/qualifications (16%).

Those who had no disposable income were more likely to disagree that their wellbeing was important to their employer (49%).

Self employed respondents were more likely to strongly agree that their work was fulfilling (27%).

Employment: **Summary**



As seen in 2018, the highest proportion of participants indicated that they were left with some disposable income once their expenses were covered. However, when reviewing additional comments relating to the employment sector, the majority of comments made reference to the disproportionate wage to living cost ratio. That is, wages were too low and living costs (predominantly housing) were too high. It should be noted that this point was so clearly stressed by respondents, with the words 'poor' and 'low' commonly used to express the state of wages throughout the district, while some expressed that a single income was simply insufficient. Other comments referenced that traditional ambitions of moving forward in life, like securing a home were made almost impossible.

"While me and my partner have good jobs, earn enough to cover our expenses, and have enough disposable income, we are still struggling to save enough for a house deposit and are unable to see how we could afford a mortgage on a house here…which makes our future in Queenstown seem uncertain."

"Pay is poor for most jobs… I have a Master's Degree in education and there is virtually no part time or casual work available that pays other than near minimum wage."

"I have to supplement my income with investments elsewhere in order to have a good standard of living."

Income trends were also observed amongst particular demographic groups. Perhaps most interesting is that those aged 18-29 and 30-44 were more likely to be in full time paid positions, yet were less likely to have a sufficient level of disposable income. In comparison older respondents were more likely to be in part time and self employed positions, and seemed to enjoy greater economic prosperity. It is of course likely that the stage of life had an impact on the respective age groups. For example, those aged 18-29 are likely to have less experience or to not have a tertiary qualification, and those aged 30-44 are likely to have the responsibility of dependants, all of which can influence an individual's wages or additional financial commitments.

When it came to job satisfaction measures, respondents on the whole tended to rate all of these measures positively. Some verbatim comments also reaffirmed this.

"Queenstown is an awesome place to work."

While this is positive for the employment sector, a key theme was noted when reviewing job satisfaction where income and satisfaction with various measures showed strong correlations. That is, the higher the income, the more positive the respondent would be, and vice versa. It is clear that the key problem for employment is insufficient pay however, it is concerning that this problem seems to be derived from a respondent's need to aid their own or their family's survivial, as opposed to simply wanting some more income for comfort.

Health

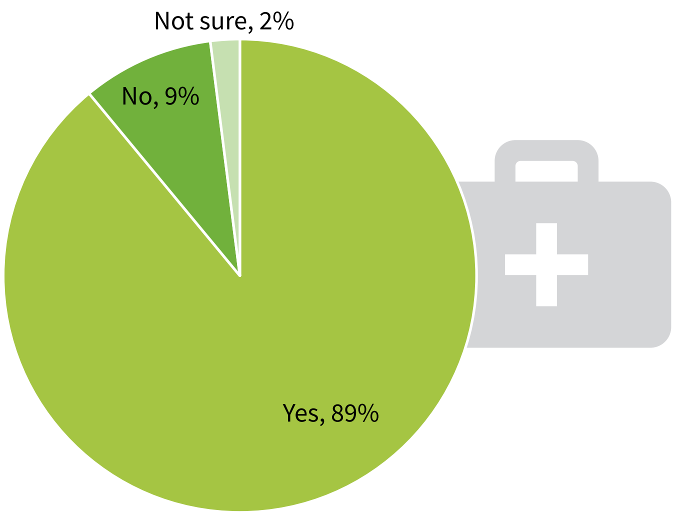
THIS SECTION LOOKS AT THE USE OF HEALTHCARE SERVICES AMONGST RESIDENTS. IN PARTICULAR, WHAT SERVICES ARE BEING USED, HOW THOSE SERVICES ARE BEING USED, AND WHY RESIDENTS ARE USING THEM. THERE IS ALSO A GLANCE AT THE OVERALL HEALTH OF RESIDENTS IN THE DISTRICT. FINDINGS SHOW THAT THERE IS A HIGH LEVEL OF REGISTRATION WITH A DOCTOR/GP, AND THAT RESPONDENTS ARE VERY ACTIVE.

Health: **Professionals**

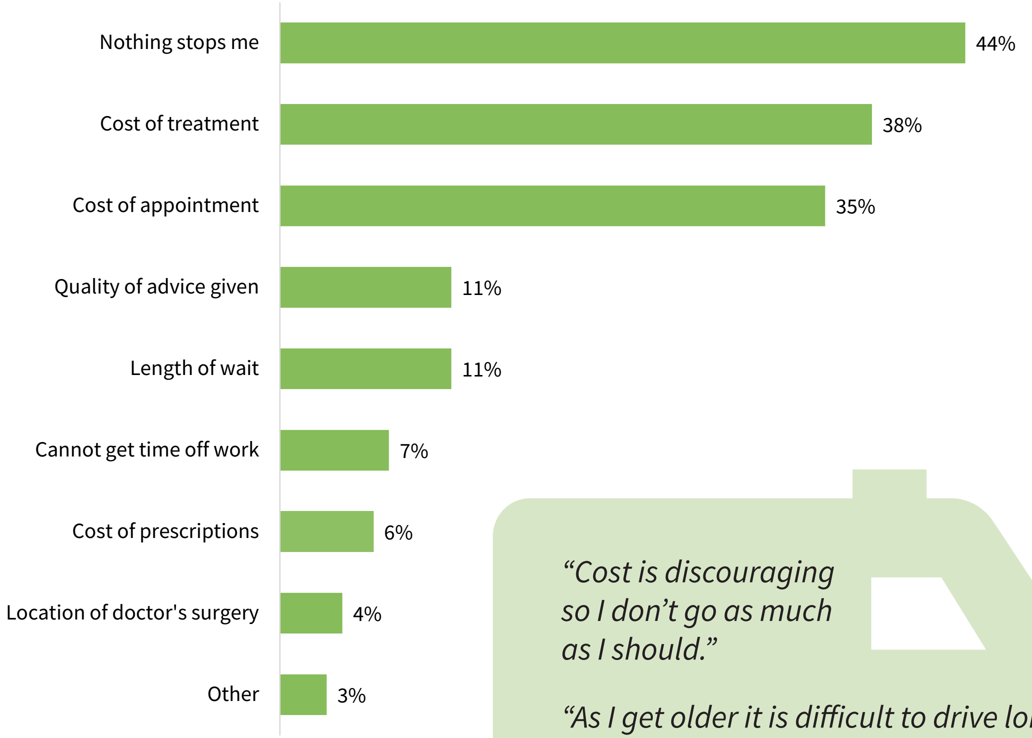
Findings showed that 89% of respondents were registered with a doctor's surgery or medical centre and that those aged 18-29 were less likely to be registered (76%). In comparison, those aged 45-64 (95%) or those aged 65+ (97%) are statistically more likely to be registered.

When respondents were asked what they viewed as barriers to accessing medical professionals, the cost of treatments (38%) or appointments (35%), the quality of the advice given (11%), and the length of wait (11%) were seen as the primary issues.

REGISTERED WITH A DOCTOR'S SURGERY/MEDICAL CENTRE



BARRIERS TO ACCESSING MEDICAL PROFESSIONALS



"Cost is discouraging so I don't go as much as I should."

"As I get older it is difficult to drive long distances to specialist appointments."

"Getting an appointment with your doctor on the day you are sick is so hard..."

Health: **Personal Use**

The Lakes District Hospital emergency department was used by 13% of respondents for injury (c.f. 87% who had not used it) and 12% for illness (c.f. 88% who had not used it). Ten percent of participants used afterhour services for injury (c.f. 90% who had not), while another 13% used it for illness (c.f. 87% who had not). Over half of the respondents (55%) indicated that they have not needed to travel outside of the district for medical services however, of those who have (45%), the highest proportion did so for an appointment with a specialist (32%).

USE OF EMERGENCY DEPARTMENT (LAKES DISTRICT HOSPITAL)

13% Injury

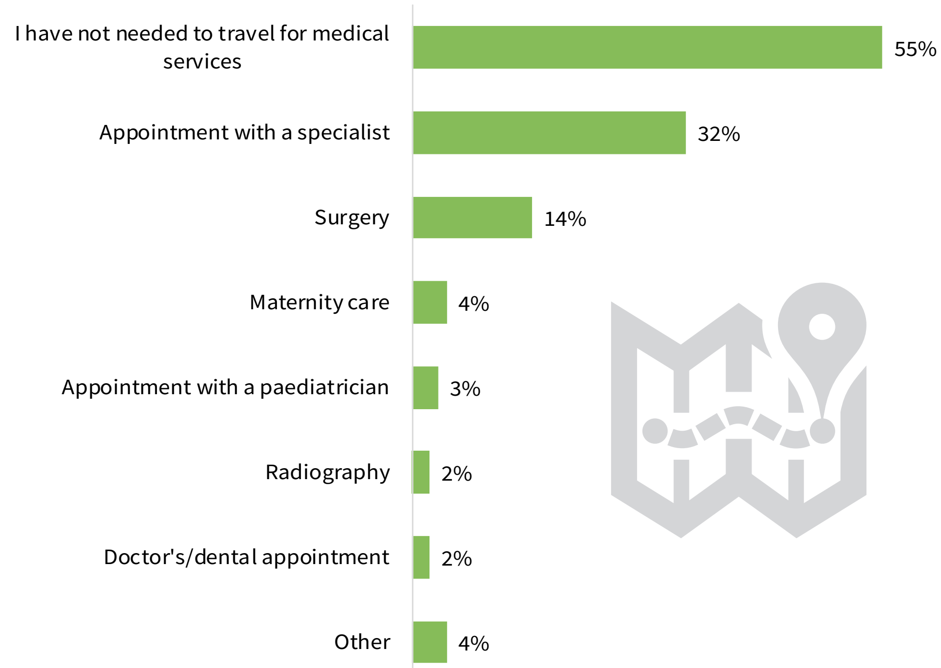
12% Illness

USE OF AFTERHOURS SERVICES (WANAKA OR QUEENSTOWN)

10% Injury

13% Illness

TRAVELLED OUTSIDE THE DISTRICT FOR MEDICAL SERVICES



Health: **Mental Health**

A GP/doctor was by far most used mental health service for both respondents themselves (24%), and for others in their household (16%). This was followed by a counsellor/psychologist where 10% of respondents used it for themselves, and 7% indicated that others in their household had used it. Very few respondents indicated that they used other mental health services besides the ones mentioned. Of the small portion who had, many mentioned the use of a natural remedy. Those who had a low income or incured cost related barriers to accessing medical professionals were more likely to have accessed mental health services.

COUNSELLOR/PSYCHOLOGIST

10% Myself
7% Others in the household
85% Not at all

CHILD, ADOLESCENT AND FAMILY SERVICES

1% Myself
2% Others in the household
97% Not at all

FAMILY CENTRE/OTHER COMMUNITY SUPPORT SERVICES

2% Myself
4% Others in the household
95% Not at all

EMPLOYEE ASSISTANCE PROGRAMME

3% Myself
1% Others in the household
97% Not at all

GP/DOCTOR

24% Myself
16% Others in the household
69% Not at all

CENTRAL LAKES COMMUNITY MENTAL HEALTH SERVICE

1% Myself
2% Others in the household
97% Not at all

Health: **Exercise**

Nearly half (49%) of the respondents indicated that they exercise 5-7 days a week, 26% exercise 3-4 days a week, and 19% exercise just 1-2 days a week. With only 7% either exercising infrequently (6%) or not exercising at all (1%), residents in the district appear to be fairly active. These results are consistent with what was seen in 2018.

DAYS SPENT EXERCISING (PER WEEK)

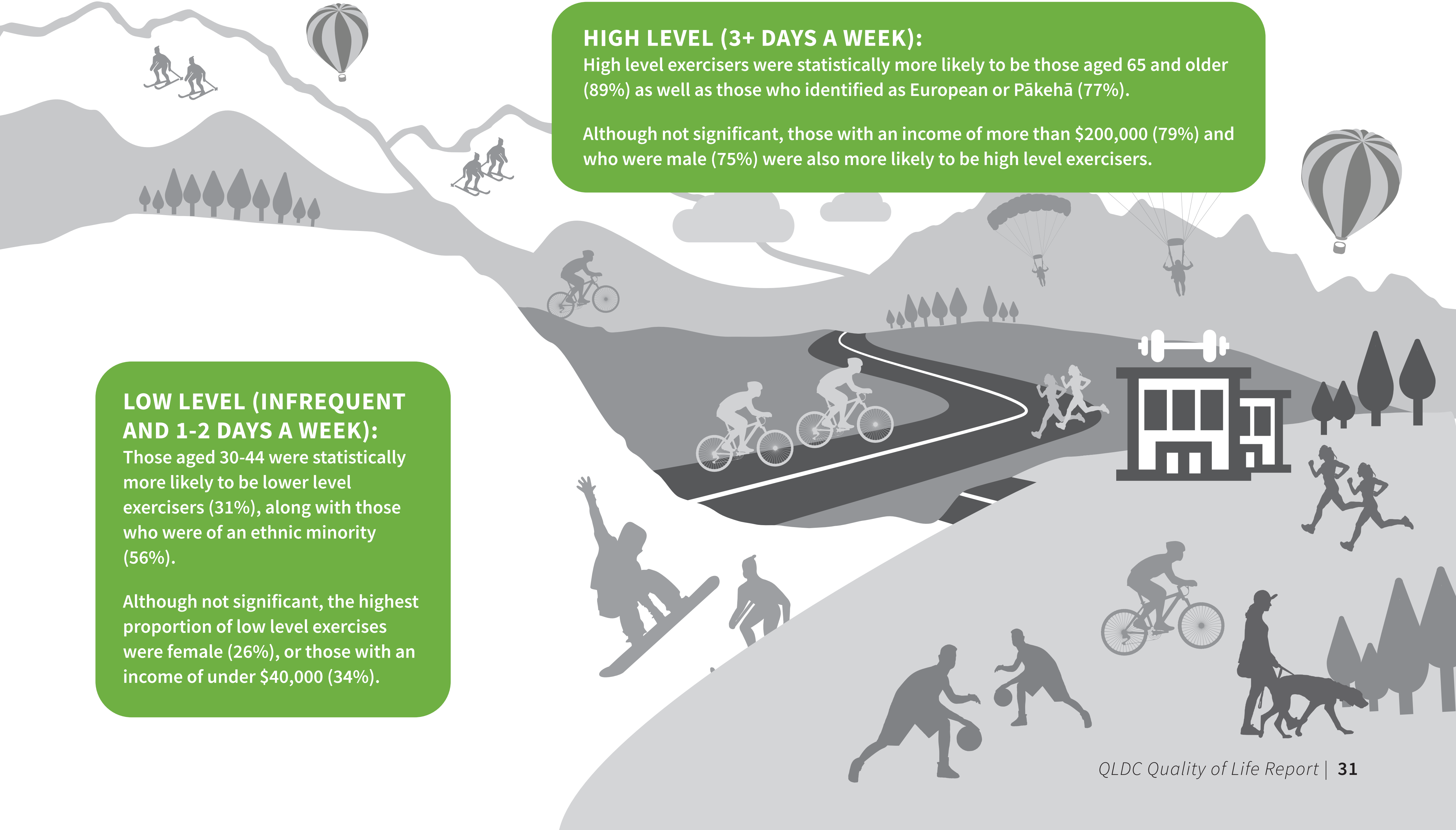
	2018	2019
5-7 days	46%	49%
3-4 days	32%	26%
1-2 days	13%	19%
Infrequently	7%	6%
Don’t exercise	2%	1%

Health: **Insights**

HIGH LEVEL (3+ DAYS A WEEK):

High level exercisers were statistically more likely to be those aged 65 and older (89%) as well as those who identified as European or Pākehā (77%).

Although not significant, those with an income of more than $200,000 (79%) and who were male (75%) were also more likely to be high level exercisers.



LOW LEVEL (INFREQUENT AND 1-2 DAYS A WEEK):

Those aged 30-44 were statistically more likely to be lower level exercisers (31%), along with those who were of an ethnic minority (56%).

Although not significant, the highest proportion of low level exercises were female (26%), or those with an income of under $40,000 (34%).

Health: **Smoking**

Nine percent of respondents either smoke (4%) or occasionally smoke (5%), while 90% do not smoke. Almost all respondents (96%) shared the belief that children's playgrounds should be smokefree while 90% felt that the entrance of buildings ought to be smokefree.

Respondents comments regarding their views of vaping were coded into themes. The most prominent theme identified was that participants find vaping distasteful or they expressed a general dislike towards it (19%). Those who smoke were statistically more likely to hold a neutral view towards vaping or suggest that it is fine.

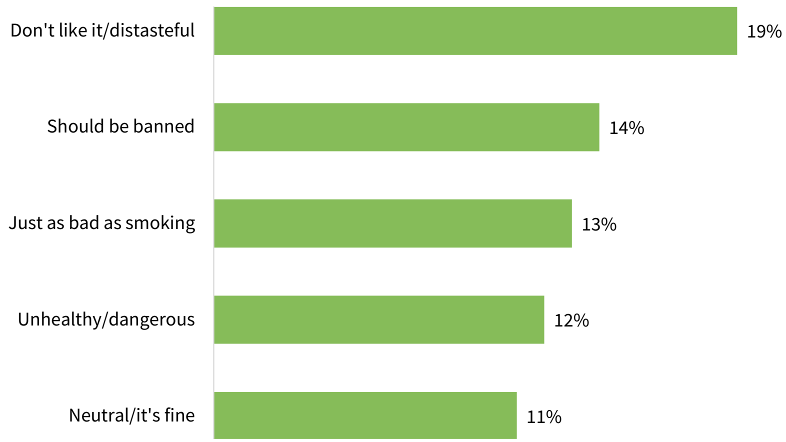
SMOKEFREE PLACES

Children's playgrounds	96%
At the entrance of buildings	90%
Bus stops	87%
Outdoor eating places and restaurants, pubs, or cafes	87%
Outdoor areas in town	82%
Footpaths outside your local block of shops	78%
Outdoor events	78%
Parks, reserves, and sports fields	75%
Beaches, river, and lake shores	71%

SMOKER

4%	Yes
5%	Occasionally
90%	No

VIEW OF VAPING (TOP 5)



Base size, n= 434

Health: **Insights**

18-29:

Those aged 18-29 were significantly more likely to suggest that all cost related factors were a barrier to accessing healthcare services, perhaps correlating to the significantly lower proportion of 18-29 year olds who were registered with a doctor (76%). Results also indicated that this age group was significantly more likely to have accessed mental health services for themselves (39%). This either reveals that they suffer more with mental health issues, or that they are more open and proactive in addressing these challenges.

30-44:

Those aged 30-44 were more likely to see certain cost related factors and the quality of advice given as barriers to accessing healthcare services, possibly suggesting that this group feels they are not receiving value for money when using healthcare professionals. As would be expected, this group was significantly more likely to travel outside of the district for maternity care (10%) and/or appointments with a paediatrician (7%). While not significant, those aged 30-44 had the highest proportion of respondents who revealed that someone in their household has accessed mental health services in the last 12 months (24%).

45-64:

This age group tended to have less difficulty accessing healthcare services and professionals. Findings showed they were more likely to be registered with a doctor (95%) and to indicate that nothing stops them from accessing other medical professionals (55%). Additionally, they were significantly less likely to have accessed a mental health service themselves (22%).

65+:

Similar to those aged 45-64, this group was more likely to be registered with a doctor (97%) and to note that nothing stops them from accessing medical professionals (74%). They were more likely to have ventured outside of the district to visit a specialist (51%) and less likely to have personally accessed mental health services (15%). Interestingly, this group was more likely to exercise over 5 days a week (68%), perhaps associated with this demographic typically having more spare time.

Health: **Insights**

MALE:

Males were significantly more inclined to say that nothing stops them from accessing a medical professional (54%). Furthermore, males were significantly less likely to have accessed a mental health service (20%).

FEMALE:

Cost was seen as a key barrier on all front for females accessing medical professionals. Females were significantly more likely to suggest costs of treatments (44%), appointments (44%), and prescriptions (8%) as hindrances to accessing such help. This potentially suggests that a female's access to a medical professional is heavily cost driven rather than need driven. Females were also more likely to acknowledge that they felt advice provided by healthcare professionals was inadequate (15%). Interestingly, females were more likely to have accessed a mental health facility over the last twelve months (34%). However, it is difficult to say whether this is due to poorer mental health, or whether females are more open to accessing or acknowledging a need for help from such services.

Health: **Insights**

EUROPEAN/PĀKEHĀ:

Europeans and Pākehās were more likely to be registered with a doctor (90%) and to indicate that nothing stops them from accessing medical professionals (46%). Given the correlation of this ethnic group with higher and more disposable income, it could be assumed that this drives their ability to access healthcare services as it reduces cost barriers.

MĀORI:

While not significant, Māori had the highest proportion of respondents who have accessed a mental health service within the last 12 months themselves (31%) or had others in their household do so (31%). While a vast majority of Māori were registered with a doctor (84%), they were more likely to see the cost of an appointment as a key barrier to accessing a medical professional (69%).

ETHNIC MINORITIES:

Ethnic minorities were significantly less likely to be registered with a doctor (79%) and when asked what prevented them from accessing such professionals, they were more likely to see location (9%), the quality of advice given (23%), and an inability to get time off work (15%) as a barrier. Although not significant, high proportions of this group also saw cost related factors as a barrier to accessing medical professionals. Interestingly, this group tended to have a lower activity rate as they were more likely to not exercise at all (5%) or to exercise for only 1-2 (50%) days per week.

OTHER ETHNICITY:

Those in the other ethnic category were less likely to be registered with a doctor (79%) and were more likely to see the location of medical professionals as a key barrier to accessing such services (25%). While not significant, it is worth noting that a high portion of this group also noted the cost of treatments (48%) and appointments (53%) as barriers. Though not significant, results revealed that this group had the lowest number of respondents who accessed mental health services in the last 12 months (26%).

Health: **Summary**

Positively, a high proportion of respondents were registered with a doctor's surgery or medical centre. Unfortunately, this does not necessarily correspond with high proportions of residents accessing these services. While we are unable to gauge the rate at which respondents are using healthcare professionals, we are able to gauge what is preventing them from doing so.

A vast majority of respondents indicated that in fact, nothing stopped them from accessing such professionals which is encouraging. However, of those that did encounter barriers, cost seemed to drive such prevention. We also saw a correlation between income and mental health. That is, those who had lower incomes were more likely to have accessed mental health services. Furthermore and perhaps even more interesting, those people who saw cost related factors as barriers to accessing medical professionals were also more likely to have accessed mental health services themselves.

"It's just so expensive here! It is $22 to see a doctor in Westport and it's $45 to see one here."

"Costs need to come down, it must be prohibitive for families."

"To see your GP is very expensive and could stop a lot of people attending and then getting more sick."

It is concerning that income and wages are such an apparent issue within the region and that it is such to the extent that basic needed services such as healthcare are not accessible because individuals either cannot afford it, or the price is off putting. Furthermore, the results imply that these issues are having a corresponding impact on individual's health and overall wellbeing, particularly around mental health. Perhaps a little more worrying is that it is in the younger age brackets where this issue is so apparent. It is worth noting that minimal pay or disposable income may not necessarily be the root behind any number of mental health issues, though it should not be neglected that there is indeed an outstanding correlation between the two. This is perhaps best summarised by the following statement:

"I don't feel like there is much help when it comes to mental health. It's expensive and people who earn entry level role wages will struggle to find the money for rent, food, and regular counselling. Part of the reason people are seeking counselling is because they are overworked, understaffed and underpaid (this is from a hospitality point of view)."

Among other comments relating to health in the district, there were a significant number that expressed in some form, frustration with the lack of medical facilities or services offered, or that the ones available are too distant.

"It's shocking that we have to travel to Invercargill or Dunedin to see a funded audiologist."

"There is a lack of specialists in the area. You need to travel to Dunedin to access most specialists."

"… Maternity services are increasingly hard to access and birthing in Queenstown is not an option for many women."

Health: **Summary**

With the continual growth and expansion of the district, there is added pressure on existing services and facilities to cater to larger numbers of residents, particularly on the healthcare sector which is so fundamental to both individual and community wellbeing.

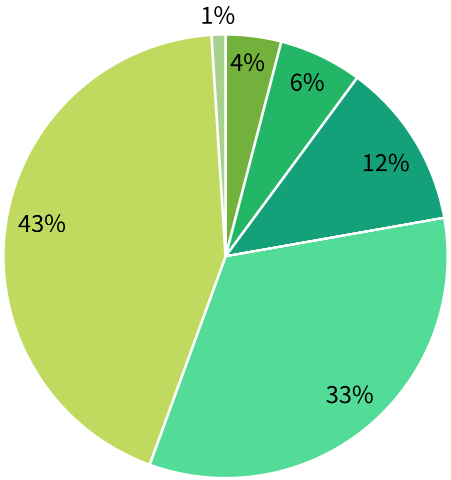
While comfort can certainly be drawn in that a high proportion of respondents are registered with a doctor and do not see any barriers in accessing health professionals, it seems that more needs to be done to better cater for those who are struggling to access basic medical help.

Our Environment

THIS SECTION FOCUSES ON PERSONAL ENVIRONMENTAL HABITS OF RESIDENTS ALONG WITH THEIR VIEWS OF CLIMATE CHANGE AND THEIR PERCEPTIONS OF QLDC'S MEASURES OF ENVIRONMENTAL PROTECTION. FINDINGS SHOWED THAT IN GENERAL RESIDENTS HAVE A STRONG CONCERN FOR THE DISTRICT'S ENVIRONMENT AND ITS WELLBEING.

Our Environment: **Personal Measures**

CONCERN WITH IMPACTS OF CLIMATE CHANGE

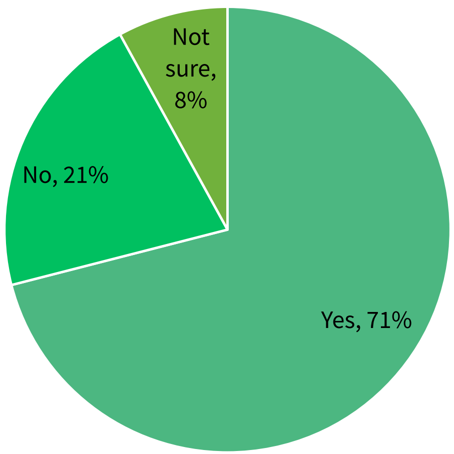


Seventy six percent of respondents indicated that they were either concerned (33%) or very concerned (43%) with the impacts of climate change.

- Not at all concerned
- Not concerned
- Neutral
- Concerned
- Very concerned
- Don't know

Total concern 2018, 75%

MADE LIFESTYLE CHANGES



Seventy one percent of respondents said they had made lifestyle changes within the last 12 months in an attempt to be more environmentally conscious. To this, participants were asked what changes they had implemented. Reduction in plastic or single use plastics seemed to be the main course of action.

INSIGHTS

Females and those aged 30-44 were statistically more likely to have an overall concern with the impact of climate change (81%).

Males were significantly more likely to not be concerned with climate change (16%).

Females were more likely to have made lifestyle changes (76%).

While not significant, those aged 18-29 appeared less likely to have made lifestyle changes (67%), as well as those with an income of under $40,000 (67%), and those who cannot cover their expenses (67%).

Our Environment: **Personal Measures**

When respondents commented on the changes they had made to their lifestyle to be more environmentally conscious, the most prominent mention related to that of plastic. That is, many residents reduced the amount of plastic they were using or refrained from using single use plastics. It is worth noting that such changes may have come about due to the recent ban on single use plastic shopping bags.

Another key initiative mentioned was that of recycling. Many respondents mentioned it as a stand alone comment, while others tended to allude to an improvement in their recycling methods, or more conscious recycling.

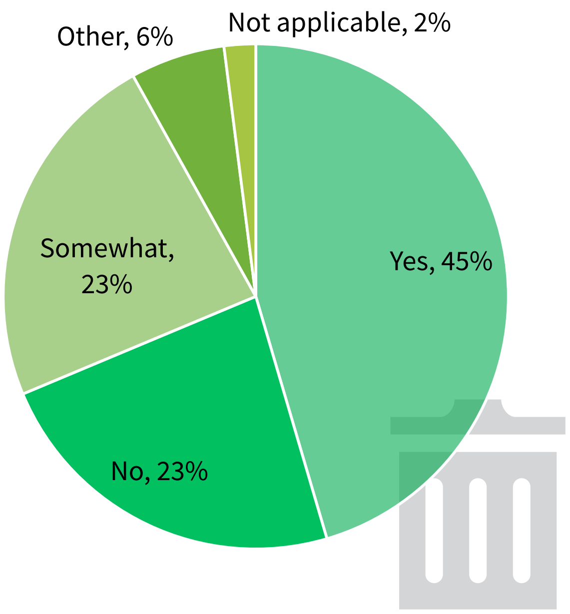
CHANGES MADE

Our Environment: **Council Initiatives**

Forty five percent of respondents indicated that the new bin system has improved household waste management, while 46% said it had either somewhat improved it (23%) or hadn't improve it at all (23%).

Twenty four percent of residents were either satisfied (21%) or very satisfied (3%) with Council's measures in protecting the environment. This result is lower than 2018 where 30% of residents demonstrated an overall satisfied rating.

THE NEW BIN SYSTEM HAS IMPROVED THE MANAGEMENT OF HOUSEHOLD WASTE



QLDC MEASURES IN PROTECTING THE ENVIRONMENT

Total satisfied 2018, 30% c.f. 2019, 24%.

Our Environment: **Summary**

Findings this year revealed that just over three quarters of responding residents were concerned in some way about the impact of climate change on the district; this is on par with the results seen in 2018. This apparent concern amongst residents was matched with a high proportion of respondents who have made conscious lifestyle changes.

This year was significant in that it saw the introduction of a new rubbish collecting system. Positively, many respondents indicated that the new system improved their household's waste management, though many others also indicated it either did not help them improve, or it only somewhat did so. Perhaps more telling, respondents were provided the option of 'other' in answering this question where they were able to provide open ended comments. These comments ranged but examples of attitudes towards the new system are shown below:

"It has created an avenue to create more waste."

"I think it is a shame that green waste has not been addressed. Not possible to compost all green waste."

"Way better! No more plastic all over the streets due to the wind and open bins."

"The new bins make it easier to get the recycling to the curb."

Negative connotations often insinuated that the new system has encouraged more waste, that certain elements of the system have been neglected (i.e. green waste or different forms of recycling), or general frustration with the process, for example bins not being collected when they should be.

On the contrary, positive comments tended to highlight a general sense of satisfaction with the new system or that the functions of the new bins were tidier and more user friendly. It should be noted that negative connotations did largely outweigh positive ones.

Open ended comments for this section tended to be fragmented and as such, made it quite difficult to articulate key themes. Nonetheless, respondents took an opportunity to further express their concern regarding various environmental issues (e.g. climate change, water quality, shifts in the natural environment, pollution etc.), a desire for QLDC and local businesses to do more, and additional references were made to the aforementioned rubbish collection system.

"Climate change is everything and ought to come into every decision that is made by Council. I am unsure if this is really being carried out."

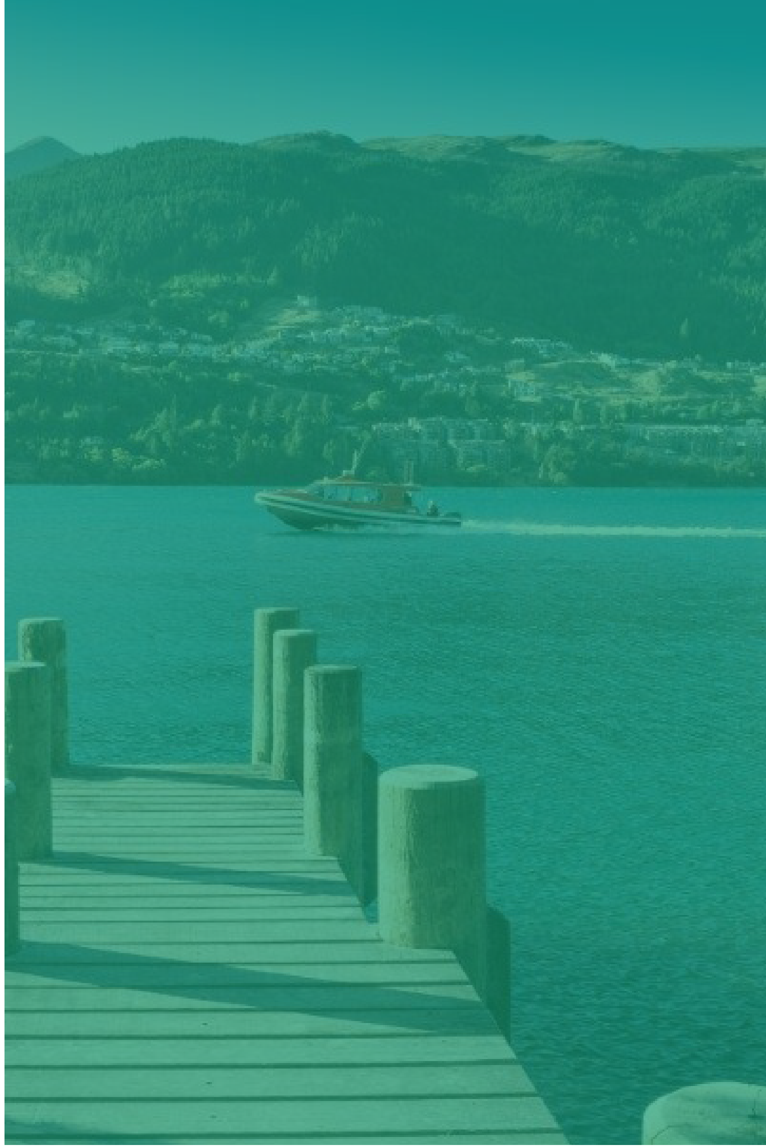
"Freedom camper waste is an issue that needs addressing. Keeping the lakes clean should be high on the agenda."

"I'd like to see more pressure on the big supermarket chains to not wrap things in plastic and I'd like to see the environment having a priority over development and tourism."

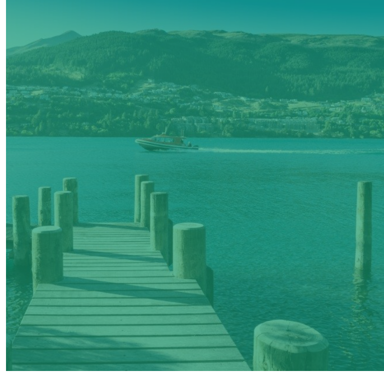
These comments and more like them stand as a witness to just how aware respondents are of environmental issues, and how engaged they are with wanting to preserve the natural environment of the Queenstown Lakes area.

Transport

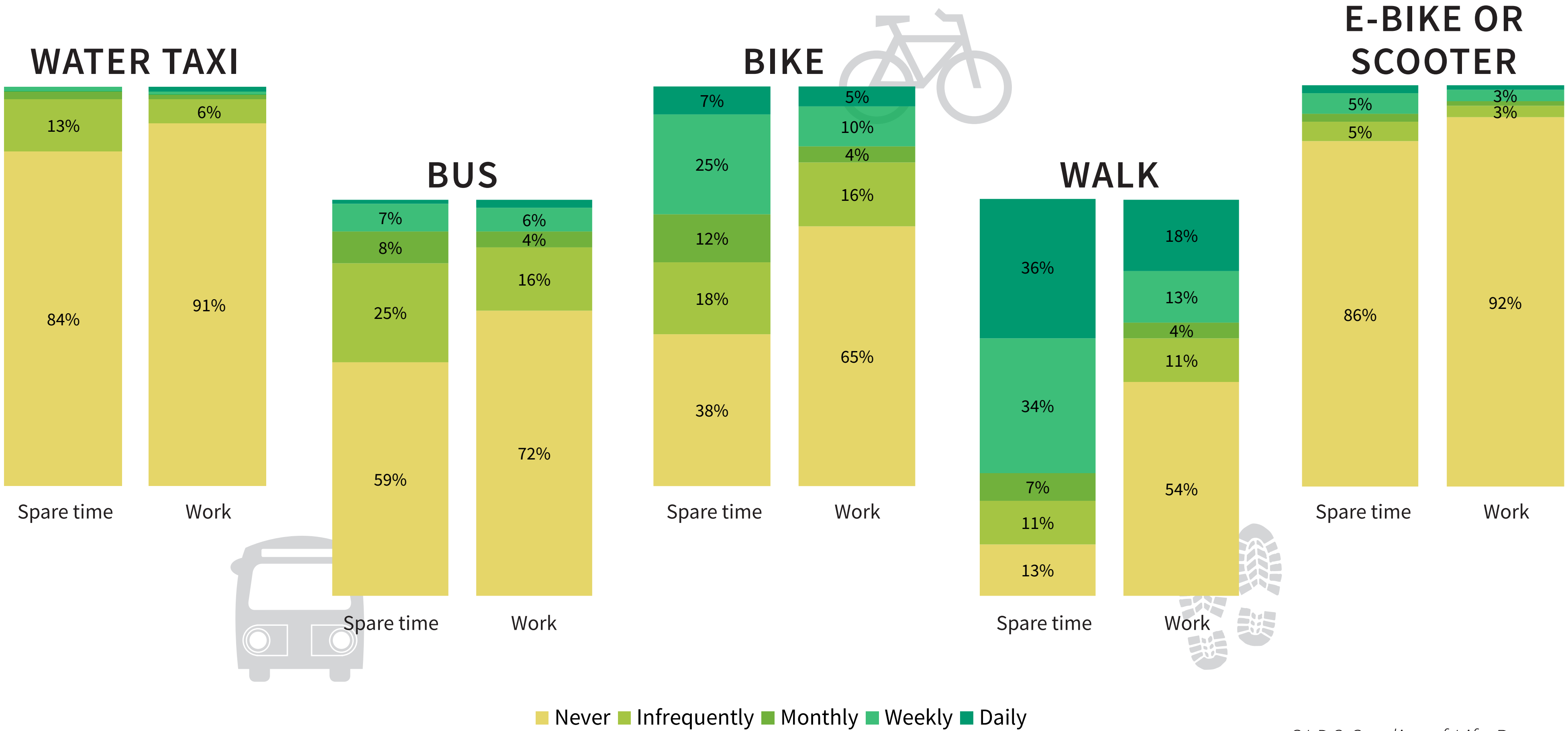
THIS SECTION FOCUSES ON TRANSPORT PATTERNS THROUGHOUT THE REGION. MORE PARTICULARLY, IT HIGHLIGHTS THE MODES OF TRANSPORT USED BY RESIDENTS, THE REGULARITY OF TRANSPORT METHODS USED, AND THE DIFFERENT ATTRIBUTES OF VARYING TOWN CENTRES IN THE DISTRICT. THE KEY FINDINGS OF THIS SECTION SHOWED THAT WHILE SOME RESIDENTS ARE BEING WELL CATERED FOR IN TERMS OF PUBLIC TRANSPORT, THERE IS A GROWING NEED OR DESIRE AMONGST OTHER RESIDENTS OR AREAS TO BE BETTER SERVICED.



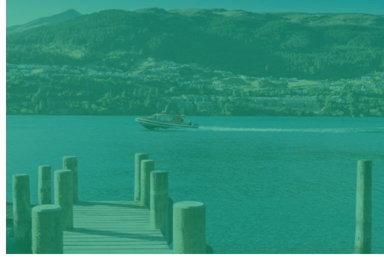
Transport: **Modes and Regularity of Transport**



Walking was the most used alternative method for both work and spare time. Seventy seven percent of respondents indicated they used walking as an alternative measure during their spare time either daily (36%), weekly (34%), or monthly (7%), while 35% indicated that they opted for walking to work daily (18%), weekly (13%), or monthly (4%).



Transport: **Modes by Area**



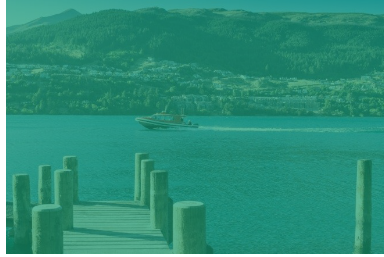
Wanaka respondents had much higher proportions of non-bus users both during spare time (86% c.f. other areas,47%) and for work (92% c.f. other areas, 63%). Interestingly, the use of alternative transport methods such as biking and walking were higher amongst Wanaka respondents both for work and during spare time.

SPARE TIME	WANAKA: USE*	OTHER AREAS: USE*	WANAKA: DO NOT USE	OTHER AREAS: DO NOT USE
Water taxi	4%	21%	96%	79%
Bus	14%	53%	86%	47%
Bike	69%	58%	31%	42%
Walk	89%	87%	11%	13%
E-bike or scooter	17%	11%	83%	89%

WORK	WANAKA: USE*	OTHER AREAS: USE*	WANAKA: DO NOT USE	OTHER AREAS: DO NOT USE
Water taxi	3%	11%	97%	89%
Bus	8%	37%	92%	63%
Bike	39%	33%	61%	67%
Walk	49%	44%	51%	56%
E-bike or scooter	8%	10%	92%	90%

**Please note that ‘use’ has been grouped based on daily, weekly, monthly, and infrequent use.*

Transport: **Personal**



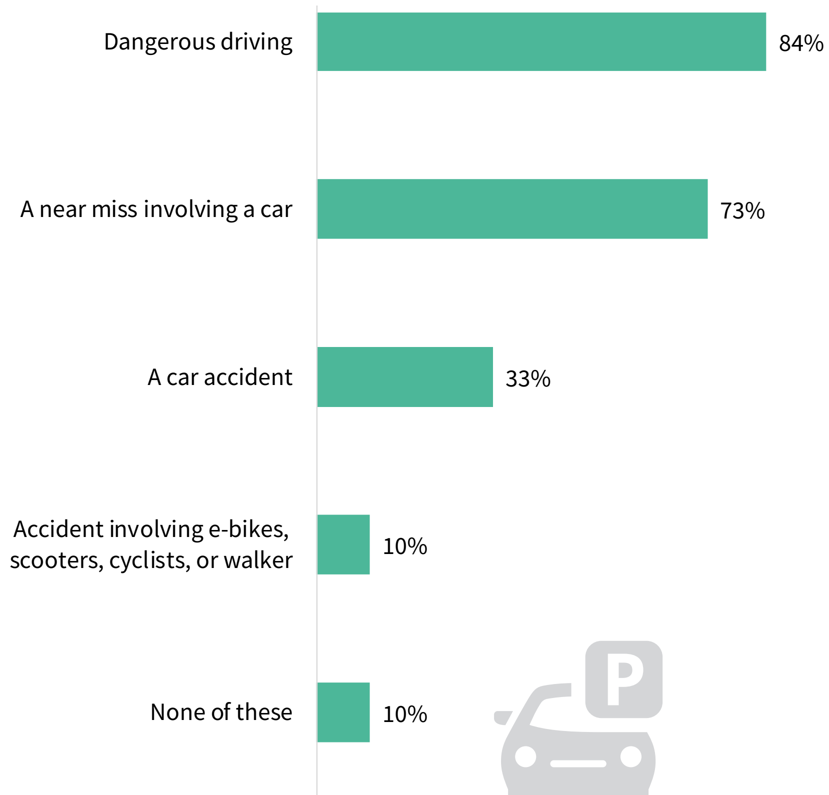
Participants were asked why they selected a particular mode of transport. Findings show that the main determinants of a chosen transport mode were time or distance (62%), the weather (39%), and cost (20%).

When asked whether respondents had been involved in or witnessed certain events, 84% indicated that they had witnessed dangerous driving.

IMPACTS OF CHOSEN TRANSPORT MODE*

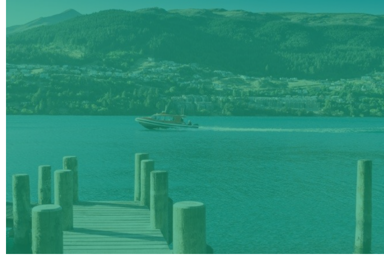
62%	Time or distance	39%	The weather
20%	Cost	19%	Parking/parking costs
18%	Tracks and trails	17%	Safety
15%	Climate change	13%	School drop-off time
11%	Footpath quality	4%	Transport availability
3%	Require a vehicle/ have a work vehicle	6%	Other

INVOLVED IN OR WITNESSED



*Please note the N/A results have been removed and other percentages have been reproportioned accordingly

Transport: **User Insights**



HIGH USER PROFILE:

Although not statistically significant, those aged 18-29, female, being of an ethnic minority, and/or 'other' ethnicity, were more frequent users of public transport. Respondents living in Frankton and in Sunshine Bay-Fernhill were statistically more likely to be high users. High users were significantly less likely to own a house. This is particularly interesting as this measure is the only insight relating to a form of any economic standing that high users might typically have.

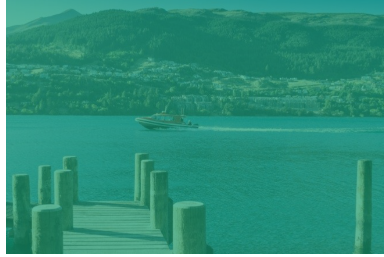
OCCASIONAL USER PROFILE:

While not statistically significant, those aged 45-64, female, and/or being of another ethnicity were more likely to be occasional public transport users. Respondents living in Frankton, Lake Hayes Estate and Shotover Country, and Queenstown were statistically more likely to occasionally use public transport.

NON-USER PROFILE:

Although not statistically significant non-users of public transport appeared to be aged 65+, male, and/or Māori. Non-users were statistically more likely to own their home, perhaps demonstrating that non-users are typically in a more sound economic position. They were also more likely to reside within the Wanaka ward or in Gibbston.

Transport: **Public Transport**

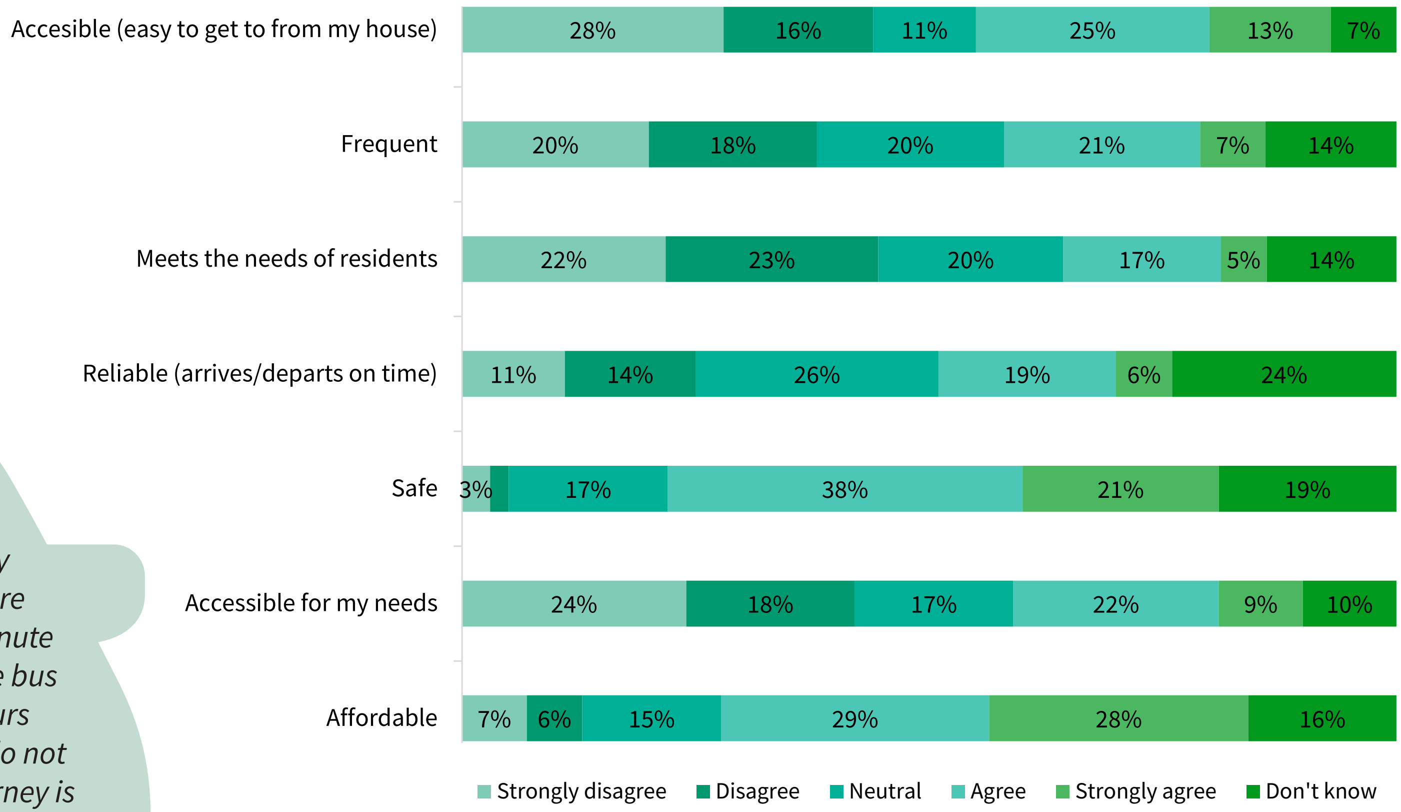


Respondents mostly agreed that public transport in the district was safe, with 59% indicating they either agreed (38%) or strongly agreed (21%). On the contrary, participants mostly disagreed that overall, public transport in the district meets the needs of residents with 45% indicating they either disagreed (23%) or strongly disagreed (22%).

"It would be fantastic to be able to use the public transport here in Queenstown. However, many of the connections between routes are unreliable and infrequent. I live a 20 minute drive from Queenstown, but to take the bus would involve a journey of over 2 hours due to a connection. Buses frequently do not show up as scheduled, meaning the journey is also unreliable which is not suitable for those working in corporate positions in town."

"We desperately need affordable, reliable public transport…"

PUBLIC TRANSPORT IN THE DISTRICT



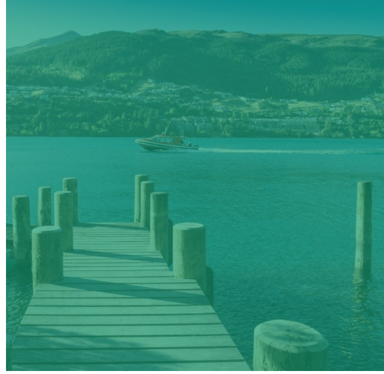
Transport: **Public Transport by Area**

Wanaka residents had lower proportions of respondents that agreed with a range of statements relating to public transport, showing a more negative stance towards public transport compared to those living in other areas within the district. Lowest agreeance amongst Wanaka residents was seen for public transport accessibility (easy to get to from their house) (4% c.f. other areas, 54%).

MEASURE*	WANAKA	OTHER AREAS
Public transport is accessible (easy to get to from my house)	4%	54%
Public transport is frequent	6%	38%
Public transport meets the needs of residents	7%	28%
Public transport is reliable	13%	31%
Public transport is safe	30%	72%
Public transport is accessible for my needs	6%	43%
Public transport is affordable	12%	77%

**Please note the above results show the total agree.*

Transport: **Public Transport Year on Year Comparison**

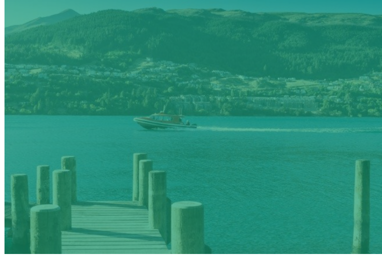


The biggest change in agreeance was seen with regards to transport frequency. That is, 28% of respondents either agreed or strongly agreed that public transport is frequent, a significant decrease from 2018 result (40%). This was followed by public transport meeting the needs of residents where 22% of participants noted it was reliable in 2019 (c.f. 2018, 33%).

MEASURE*	2018	2019
Public transport is accessible (easy to get to from my house)	46%	38%
Public transport is frequent	40%	28%
Public transport meets the needs of residents	33%	22%
Public transport is reliable	32%	25%
Public transport is safe	58%	59%
Public transport is accessible for my needs	38%	31%
Public transport is affordable	60%	57%

Please note the above results show the total agree.

Transport: **Perception Insights**



HIGH USER PERCEPTIONS:

High public transport users tended to be more positive towards all public transport attributes. That is, they were more likely to either agree or strongly agree with statements such as ‘public transport is accessible’, ‘public transport is reliable’, and ‘public transport is affordable’ etc. Positive experiences with such attributes are what would likely drive further use by this group.

Results indicated that high users were more likely to choose their mode of transport based on climate change and the quality of footpaths. This is further validated as those who were high users were statistically more likely to be very concerned with the impacts of climate change. Interestingly, they tended to be more likely to frequently walk, bike, or scooter to work. Indeed, the choice of which method to use is likely dictated by the vast seasonal changes throughout the district.

OCCASIONAL USER PERCEPTIONS:

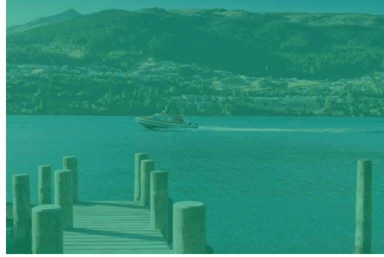
Similar to high users, occasional users were statistically more likely to agree or strongly agree with statements made relating to public transport features. Their agreeance to such statements indicated that they were more likely to have positive sentiments towards public transport generally.

Findings revealed that where occasional and high users differed was in their motives for transport use. That is, occasional public transport users were significantly more inclined to say the weather and parking or parking costs were the motivating factors behind their choice of transport. Both of these elements have a tendency to fluctuate which correlates with a varying or only occasional use of public transport. Those who were occasional users of public transport were also occasional users of other transport modes (bikes, walk, scooter).

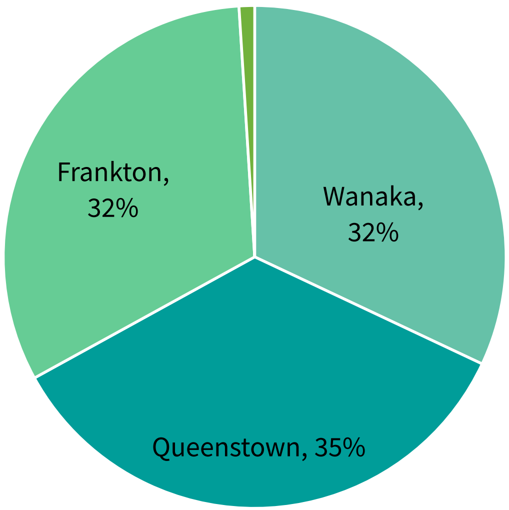
NON-USER PERCEPTIONS:

Findings showed that non-users were significantly more inclined to have unfavourable sentiments towards varying attributes of public transport. They were more inclined to disagree or strongly disagree with things such as public transport being safe, frequent, and reliable etc. Non-users of public transport were also statistically more likely to be non-users of transport methods other than driving. Ultimately these findings suggest that the poor perceptions, and the mere convenience of driving, is what stops non-users utilising public transport or other modes of transport. It is telling that non-users were more likely to reside around Wanaka, where respondents report a lack or unfulfilled need of public transport services.

Transport: **Visits to Town Centre**



MOST REGULARLY VISITED TOWN CENTRE



"The town centre of Wanaka risks becoming like Queenstown; inaccessible and overrun by tourists."

"I rarely go into Queenstown town as it's too difficult to get around, find a park, and avoid pedestrians crossing the road."

"Pedestrianise the town! Less parking, more areas for people!"

"Parking is a nightmare in town, tourist buses are parked absolutely everywhere."

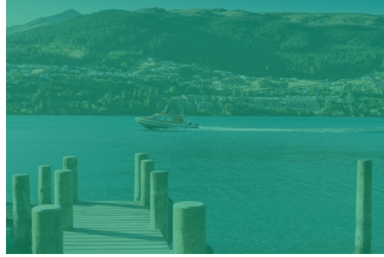
INSIGHTS

Those aged 65+ and those who belong to the European/Pākehā ethnic group were more likely to visit Wanaka.

Ethnic minorities were more likely to visit Frankton.

High and occasional public transport users were more likely to visit Queenstown, while occasional public transport users were also more likely to visit Frankton.

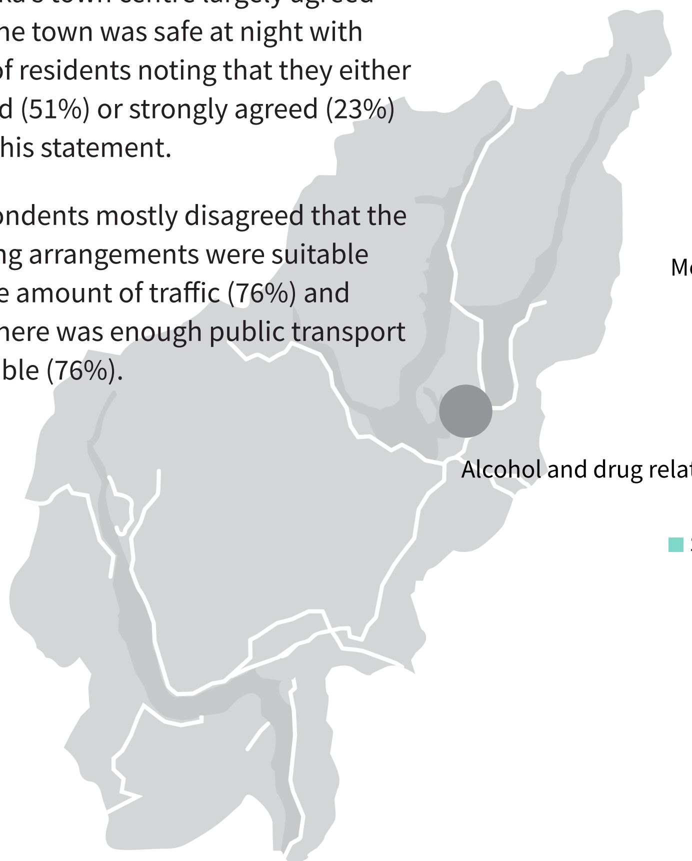
Transport: **Town Centres**

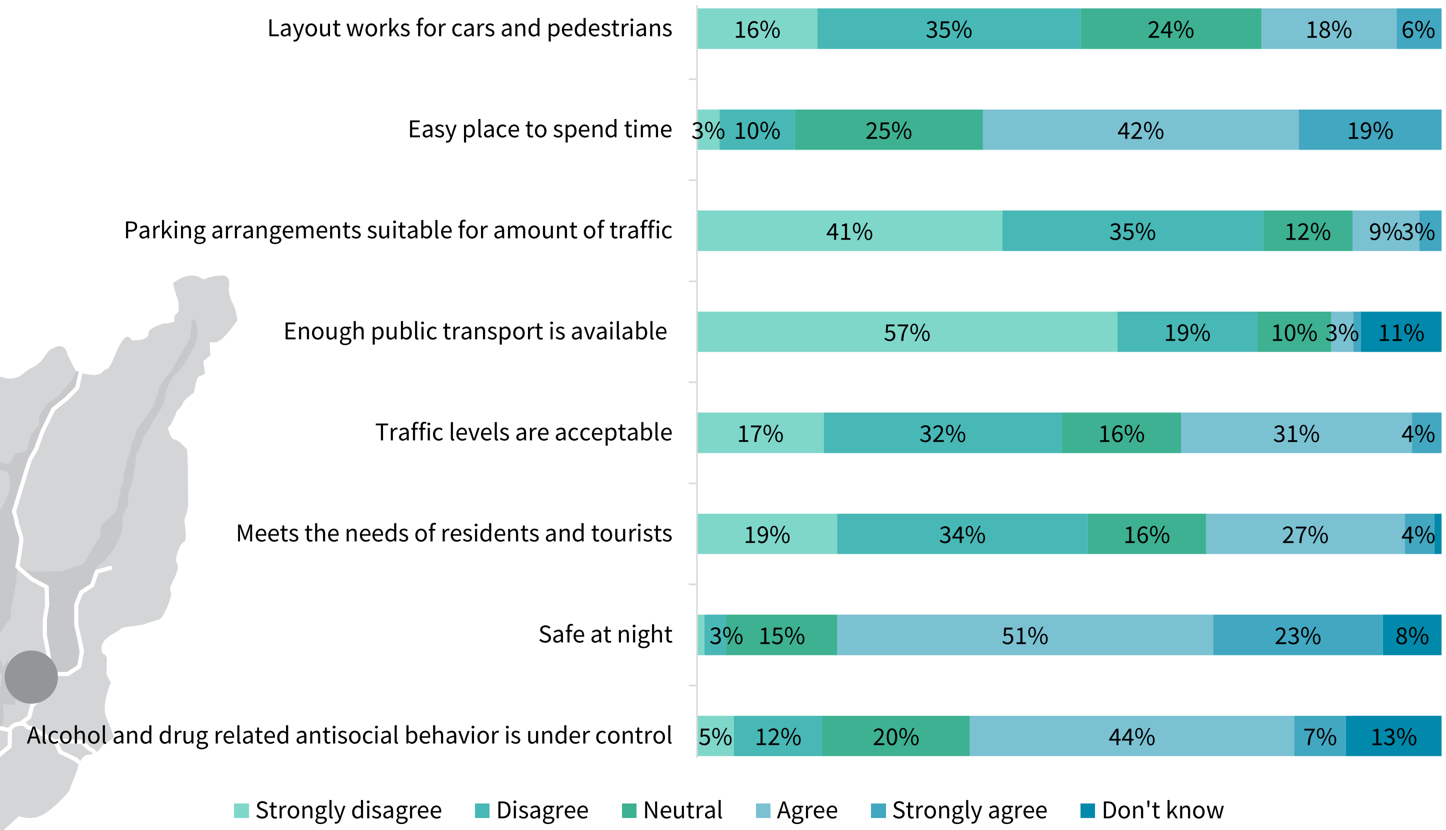


TOWN CENTRE CHARACTERISTICS WANAKA

Respondents who mostly visited Wanaka's town centre largely agreed that the town was safe at night with 74% of residents noting that they either agreed (51%) or strongly agreed (23%) with this statement.

Respondents mostly disagreed that the parking arrangements were suitable for the amount of traffic (76%) and that there was enough public transport available (76%).





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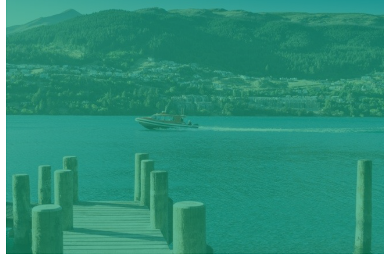
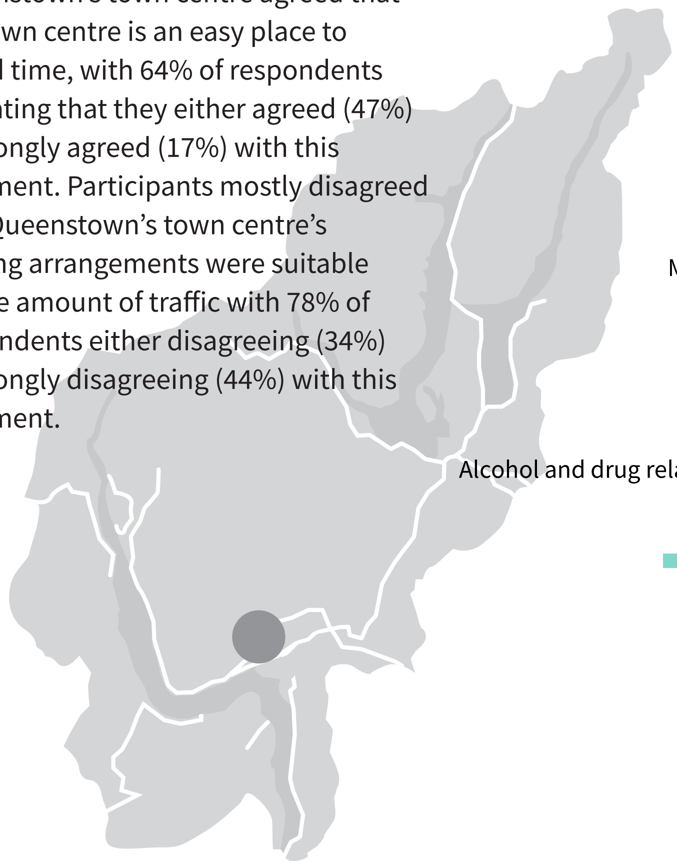
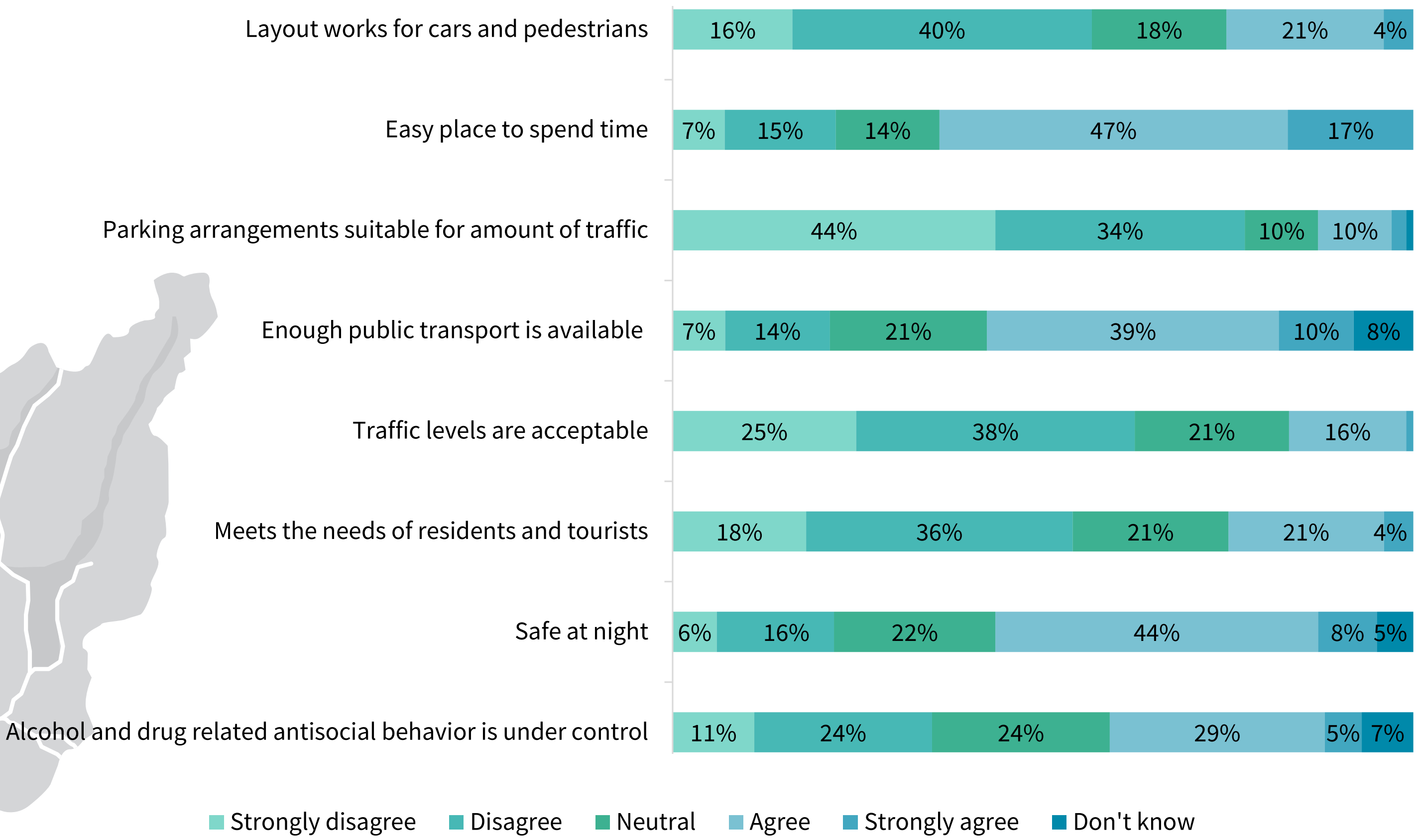
Transport: **Town Centres**



TOWN CENTRE CHARACTERISTICS QUEENSTOWN

Respondents who mostly visited Queenstown's town centre agreed that the town centre is an easy place to spend time, with 64% of respondents indicating that they either agreed (47%) or strongly agreed (17%) with this statement. Participants mostly disagreed that Queenstown's town centre's parking arrangements were suitable for the amount of traffic with 78% of respondents either disagreeing (34%) or strongly disagreeing (44%) with this statement.





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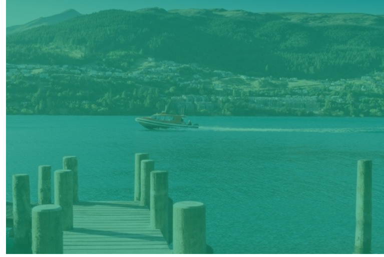
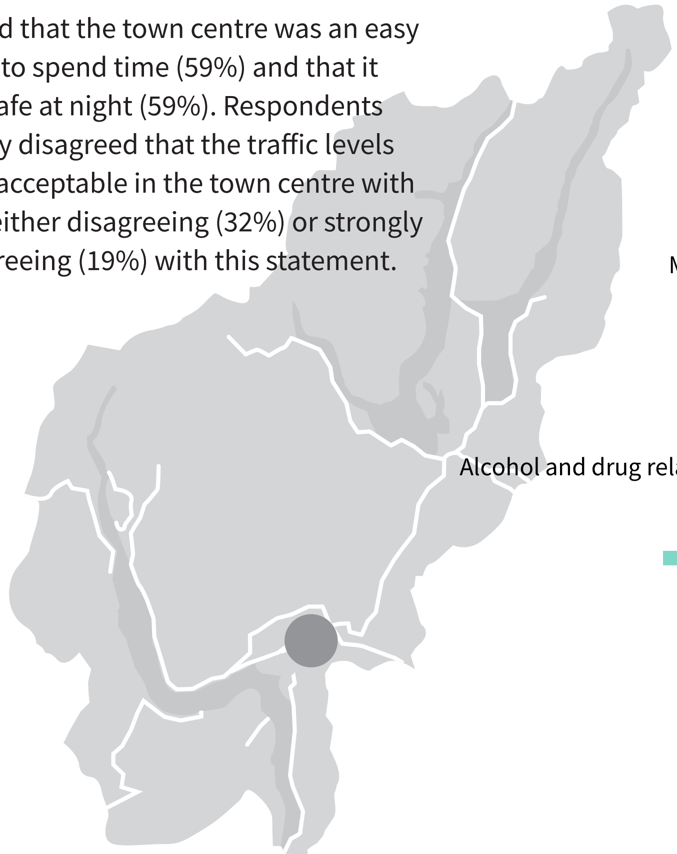
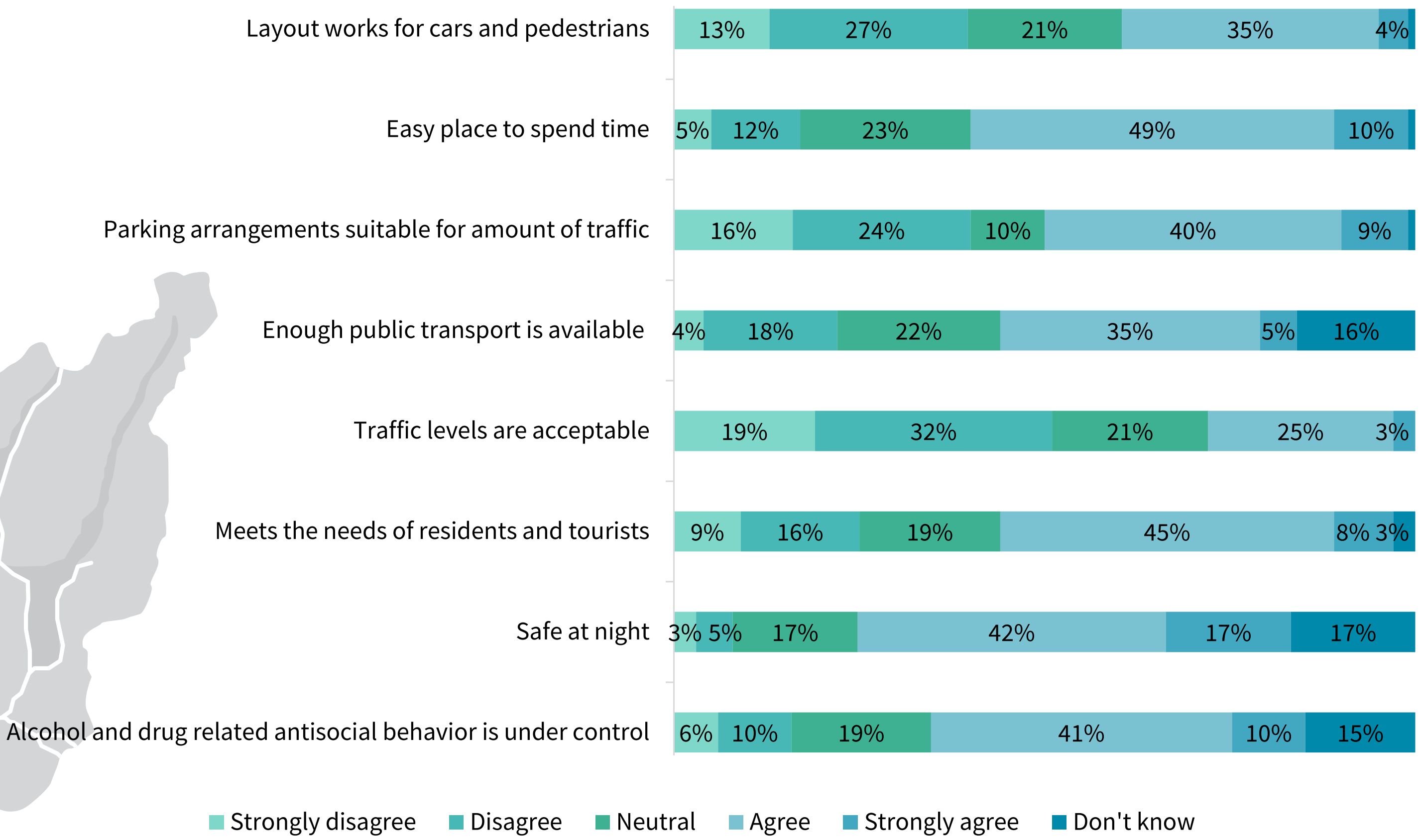
Transport: **Town Centres**



TOWN CENTRE CHARACTERISTICS FRANKTON

Respondents who indicated that they visited Frankton's town centre the most agreed that the town centre was an easy place to spend time (59%) and that it was safe at night (59%). Respondents mostly disagreed that the traffic levels were acceptable in the town centre with 51% either disagreeing (32%) or strongly disagreeing (19%) with this statement.





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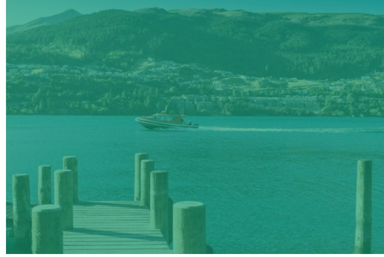
Transport: **Town Centres**

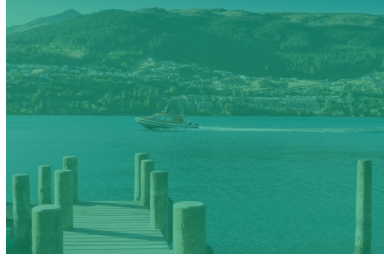


Wanaka results tended to be similar between year on year in most cases with the largest shift being seen for traffic levels being acceptable (35% c.f. 2018, 18%). Queenstown town centre saw the biggest change in the proportion of respondents who agreed that the town centre is an easy place to spend time (64% c.f. 2018, 53%).

TOWN CENTRE CHARACTERISTICS*	WANAKA 2018	WANAKA 2019	QUEENSTOWN 2018	QUEENSTOWN 2019	FRANKTON 2019**
Layout works for cars and pedestrians	26%	25%	26%	25%	39%
Easy place to spend time	65%	61%	53%	64%	60%
Parking arrangements suitable for amount of traffic	12%	12%	9%	12%	49%
Enough public transport is available	6%	4%	47%	53%	47%
Traffic levels are acceptable	18%	35%	13%	17%	28%
Meets the needs of residents and tourists	N/A	31%	N/A	25%	54%
Safe at night	N/A	80%	N/A	55%	71%
Alcohol and drug related antisocial behavior is under control	N/A	58%	N/A	36%	59%

**Please note that shown percentages exclude 'don't know' responses and are reproportioned accordingly. Result show the total agree percentage.*
***Please note town centre characteristics were not measured for Frankton in 2018.*

Transport: **Summary**



Open ended comments relating to transport uncovered a strong theme that a number of areas throughout the region were not serviced by public transport systems. Such comments were often accompanied by a reference that either expressed a desire or need for such services to enter certain areas throughout the district, or comments which suggested that such services would generate more use by residents.

> *"Public transport is not available where I live which is why I don't use it."*
>
> *"I would like a realistic public transport option but the nearest bus stop is 4-5km away."*

Areas that appeared to receive a high number of mentions included Wanaka, Hawea, and Albert Town as is illustrated in the comments below.

> *"Wanaka needs public transport."*
>
> *"Public transport to connect Albert Town, Hawea, Lake Hawea, and Wanaka is essential."*
>
> *"A public bus service in Wanaka and Hawea would be really well used."*

Interestingly, and perhaps telling is that respondents were more likely to disagree that overall, the public transport available in the district meets the needs of residents. That is, public transport was perceived to only service certain parts of the district and so, it is only fulfilling the needs of some residents and not the district overall. These negative associations were particularly apparent amongst non-users of public transport. High users were more inclined to hold positive perceptions around these chracteristics.

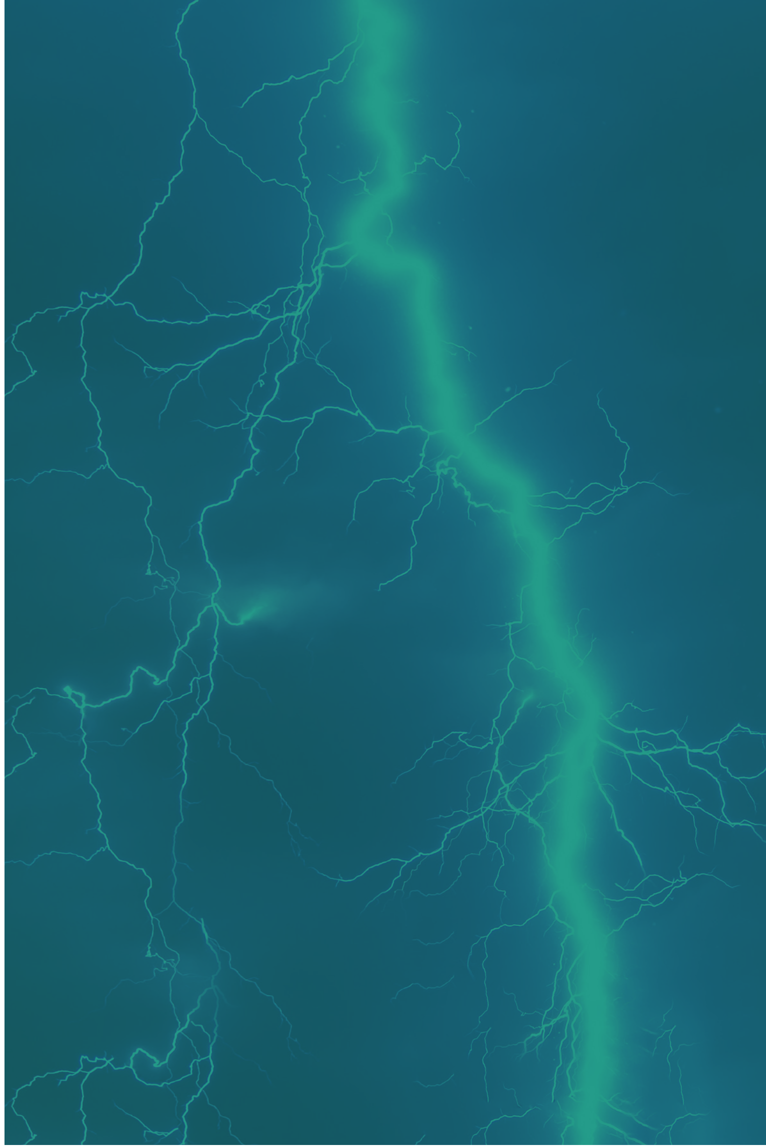
Another theme identified in the verbatim comments related to town centres. These comments included a need for more parking or more affordable parking, but perhaps more so, respondents felt that cars actually needed to be banned from town centres and to make way for more 'pedestrianised' areas.

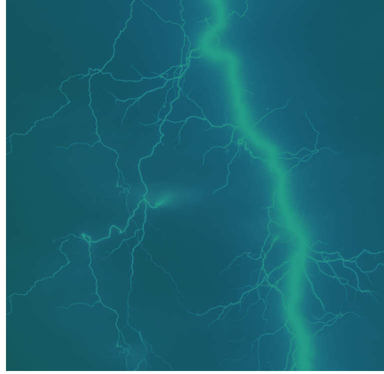
> *"We need more car parking and more public transport."*
>
> *"There is simply not enough parking and most of the parking that is available is overpriced."*
>
> *"Pedestrianise the town centre and put parking on the periphery…"*
>
> *"By far the majority of traffic in Queenstown is moving around the CBD… a bypass around the CBD would create a better environment for pedestrians."*

These comments show conflicting ideals in how the town centres ought to be improved for usability with some saying it needs to accommodate more vehicles with parking, while others say it needs to better serve pedestrians. These conflicting comments make it difficult to articulate how planning around this area might be most effective.

Preparedness and Safety

THIS SECTION FOCUSES ON HOW PREPARED INDIVIDUALS AND NEIGHBORHOODS WOULD BE IN THE EVENT OF AN EMERGENCY. IT ALSO LOOKS AT THE IMPROVEMENT OF KEY SAFETY ISSUES AS WELL AS ANY OTHER SAFETY ISSUES WHICH RESPONDENTS ARE CONCERNED WITH. FINDINGS SHOWED THAT THERE WAS A CORRELATION BETWEEN RESIDENTS WHO WERE PREPARED FOR AN EMERGENCY AND THE LENGTH OF TIME THEY HAVE RESIDED IN THE DISTRICT.





Preparedness and Safety: **Preparedness**

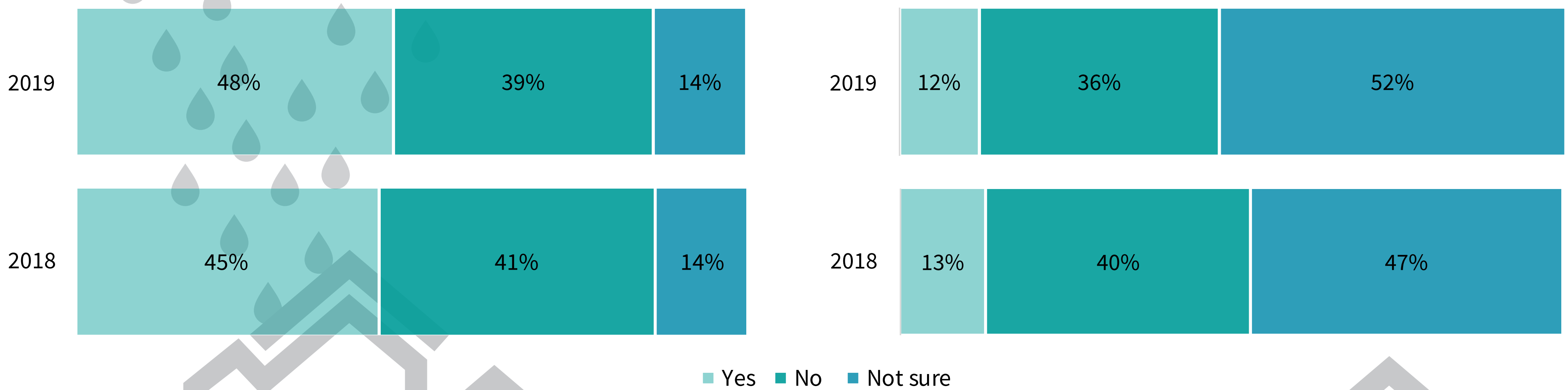
In 2019 there was a 3% increase in the number of individuals who stated that they were prepared for an emergency (48% c.f. 2018, 45%).

When respondents were asked whether their neighbourhood was prepared for an emergency, 12% said yes (c.f. 2018, 13%) while 36% indicated they were not (c.f. 2018, 40%). Over half (52%) of participants were not sure whether their neighbourhood was prepared (c.f. 2018, 47%).

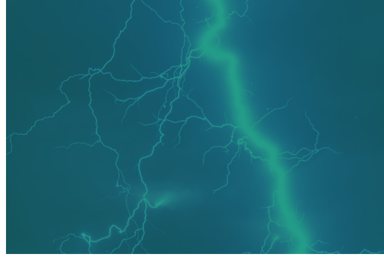
EMERGENCY PREPAREDNESS

YOURSELF

NEIGHBOURHOOD



Preparedness and Safety: **Insights**



PREPARED:

Results revealed that residents who have lived within the region for 10 years or more and those who owned their home were statistically more likely to be prepared for an emergency. This suggests that a sense of settling or permanency of residents contributes to their level of preparedness.

In terms of demographic correlations, prepared respondents were statistically more likely to be 45 or older and male. Findings also showed that those with a sufficient level of disposable income were statistically more likely to be prepared.

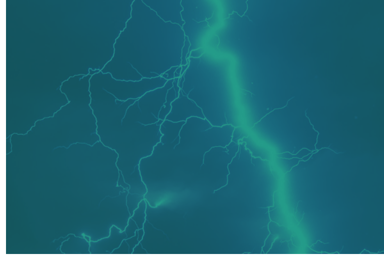
UNPREPARED:

Respondents who were unprepared for an emergency were statistically more likely to have been living in the district for under 5 years. This suggests that compared to those who were prepared, unpreparedness could be a case of unfamiliarity with the district and/or emergency protocols.

Unprepared residents were statistically more likely to rent their home or room, and to live with other non-related adults or children, perhaps alluding to a flatting situation.

Demographic findings showed that those most unprepared were statistically more likely to be under 44 years of age and/or female.

Preparedness and Safety: **Safety**



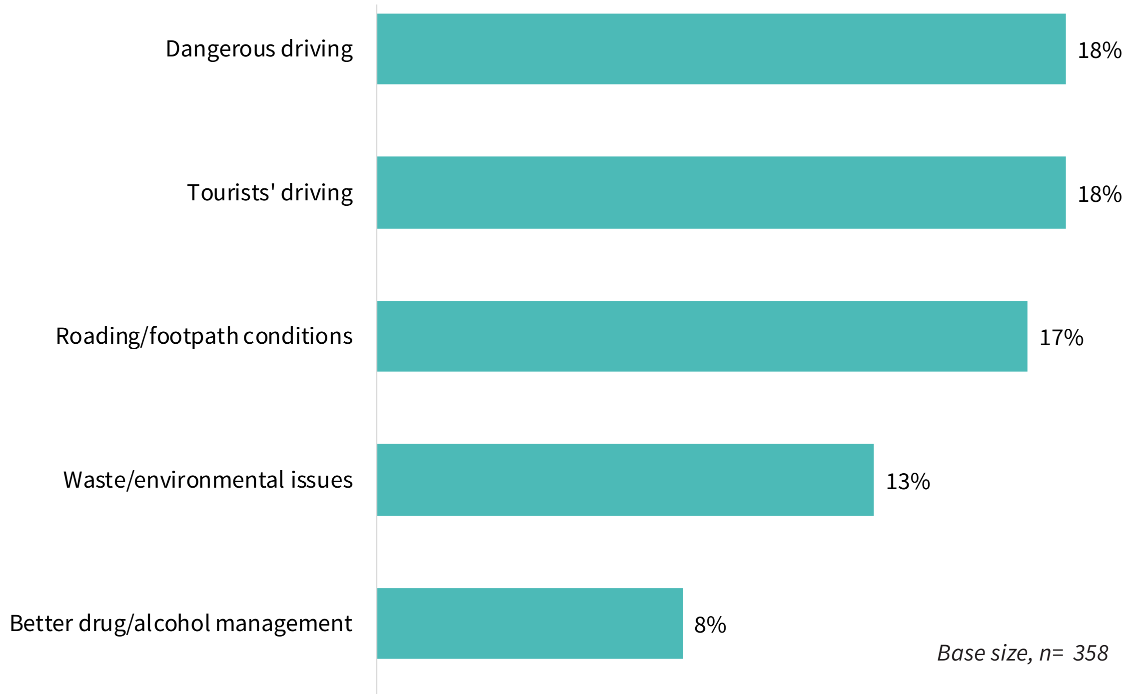
Respondents were asked whether certain issues which were highlighted in the 2018 Quality of Life Study had been adequately addressed. Findings showed that just 12% of residents felt that dangerous driving has been adequately addressed. A further 30% felt alcohol and drug-related antisocial behaviour had been addressed, and 35% said litter and dumping rubbish had been addressed.

When asked what other safety issues needed addressing, 36% of respondents re-emphasised dangerous driving (18%) or tourists driving (18%) as key safety concerns.

ISSUES ARE BEING ADEQUATELY ADDRESSED

Dangerous driving	12%
Alcohol and drug related antisocial behaviour	30%
Litter and dumping rubbish	35%

OTHER SAFETY ISSUES (TOP 5)*



*Please note these results have had the 'don't know' responses removed and have been reproportioned accordingly.

Preparedness and Safety: **Summary**

It is positive that the highest proportion of respondents indicated that they themselves were prepared for an emergency, however over half were unsure whether their neighbourhood was. This could be largely influenced by the transient nature of the district and therefore more temporary communities and neighbourhoods making it difficult for permanent residents to collaborate and make such preparations. Nonetheless, these results indicate that there is room for improvement among neighbourhood emergency preparedness.

Residents reiterated a severe concern for their safety on roads with a minimal number of respondents indicating that dangerous driving has been adequately addressed. When asked whether there were any other safety issues that needed addressing, dangerous driving was cited again, along with tourists' driving. Many respondents referenced a general concern for their safety on the road with dangerous drivers.

"Dangerous driving is rife in this. Everyday driving home at 6:00pm we easily avoid at least 6 accidents in town."

"Dangerous driving is a daily occurrence on our roads."

Tourists' driving was often referenced with a sense of danger, though more particularly, respondents seemed to be concerned about their lack of understanding around, or acquaintance with, local road rules and driving on the right side of the road.

"The driving is really concerning. I have had 3 occasions in the last six months of near head on collisions with drivers on the wrong side of the road."

"Tourist driving 100%. I have seen far too many tourists who don't know how to drive on our roads causing crashes or near misses."

"Mainly foreign drivers that are being given bigger campers but are unaware of a lot of the road rules. Especially in the winter when the roads can be a challenge to experienced drivers."

To combat this issue, many respondents suggested that tourists should undergo training of some form or that onus ought to be put on rental car companies to ensure that tourists have adequate knowledge of local road rules. Alternatively, some participants suggested tourists should have to pass a specific driving test before being granted driving rights.

"Overseas tourists/visitors should attend some sort of webinar or course to ensure they are aware of what to do and what not to do on New Zealand roads…"

"International tourists from countries that drive on the other side of the road should have to pass a simulation test before they are granted permission to hire or buy a vehicle."

"Rental car companies must provide better road safety education to customers. Make them watch safe road behaviours before they hand over the keys."

Preparedness and Safety: **Summary**

It is clear that driving is the most concerning of all safety issues in the district, the majority of which has been attributed to visitors in the district. However, it is encouraging that amidst the expressed concerns, participants have initiated discussions about, and provided idea on, how they would like to see such issues overcome. This gives the district and relevant parties some ideas on how this matter might be alleviated.

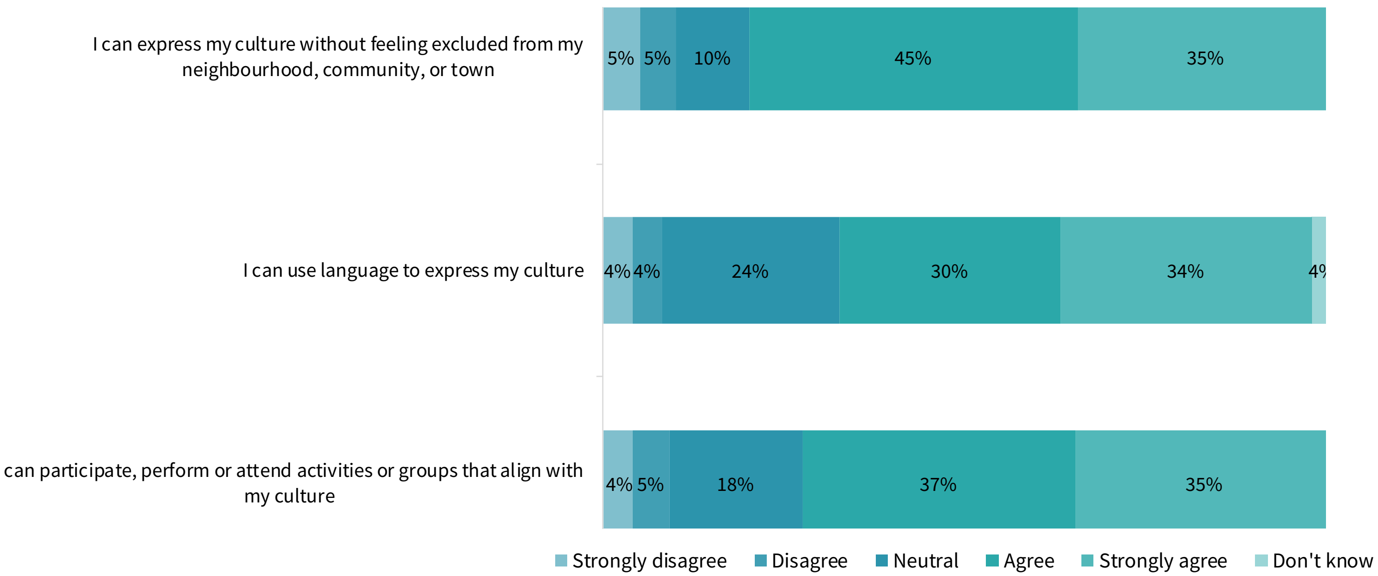
Belonging

THIS SECTION LOOKS AT RESIDENTS SENSE OF BELONGING IN THE DISTRICT THROUGH THEIR INDIVIDUAL CULTURES, AND THEIR CONNECTIONS TO COMMUNITY GROUPS. IT ALSO FOCUSES ON NEIGHBOURHOOD PERCEPTIONS, PRIDE IN THE DISTRICT, AND THE INTENTION OF STAYING IN THE DISTRICT. KEY FINDINGS SHOW THAT THE MAJORITY OF RESPONDENTS WHO IDENTIFY WITH A CULTURE FEEL AS THOUGH THEY CAN EXPRESS THIS WITHOUT FEELING EXCLUDED.

Belonging: **Culture**

Twenty three percent of respondents indicated that they identified with a particular culture while 77% did not. Of those 23%, the main culture noted was New Zealander/Kiwi (41%) followed by European (13%). Respondents mostly agreed that they could express their culture without feeling excluded with 80% either agreeing (45%) or strongly agreeing (35%). Lower levels of agreement were seen for use of language (64%) and the ability to participate in activities or groups that align with their culture (72%).

EXPRESSION OF CULTURE



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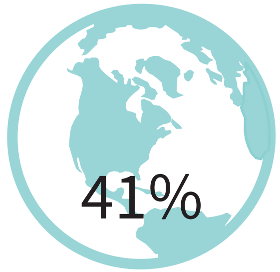
CULTURE IDENTIFIED WITH (TOP 5)*



NEW ZEALANDER/ KIWI

EUROPEAN

BRITISH/ SCOTTISH/IRISH

MĀORI

CHRISTIAN

**Please note that these are weighted.*

Belonging: **Culture**

Fifty five percent of participants indicated that they had participated in cultural events. This is a decrease of 11% compared to 2018 (66%).

When asked how satisfied participants were with the celebration of tangata whenua throughout the district, just 25% of respondents were either satisfied (19%) or very satisfied (6%). Forty three percent indicated that they were neither satisifed or dissatisfied, but rather neutral.

Forty six percent of respondents indicated that they were either satisfied (32%) or very satisfied (14%) with the arts, culture, and heritage offerings available within the district.

Those who were very dissatisfied or dissatisfied with the celebration of tangata whenua and/or the arts and cultural offerings in the district were more likely to disagree or strongly disagree with having the ability to use their language to express their culture.

Those who were dissatisfied with the cultural offerings in the district were also more inclined to strongly disagree that they are able to express their culture without feeling excluded.

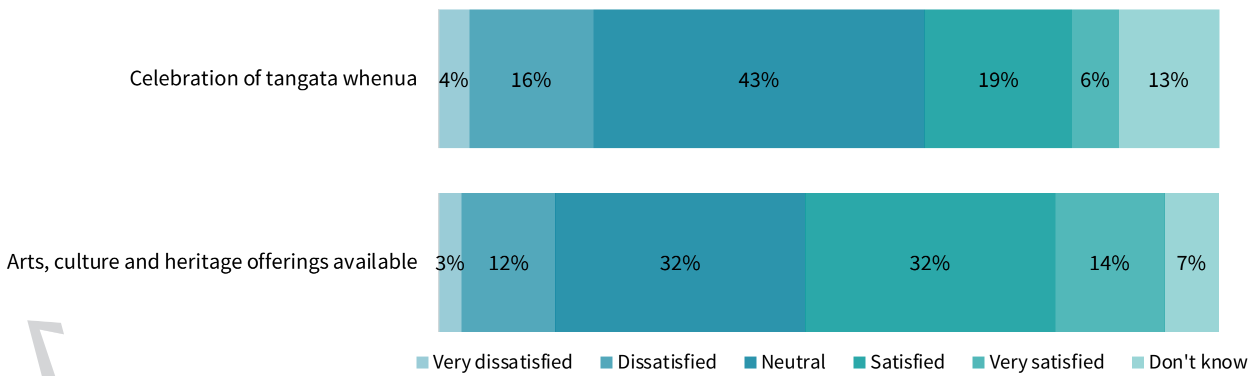
PARTICIPATION IN CULTURAL EVENTS*

55%	45%
2018, 66%	2018, 31%
YES	NO

"Māori culture is unique and should be supported."

"There is art and culture in this area but I'd like to see more."

SATISFACTION WITH...



**Please note, 2018's scale included a 'not sure option'.*

Belonging: **Culture and Ethnicity**

As respondents identified their culture in a fragmented way (e.g. ethnicity, religion, and country), it is worth exploring the relationship between cultural perceptions and ethnicity to further understand the workings of culture in the district.
This analysis showed that those who identified as Māori, ethnic minority, or other had higher proportion of respondents who felt excluded when they expressed their culture or that they were unable to participate, perform or attend activities that align with their culture. Interestingly, satisfaction with the celebration of tangata whenua (31%) and arts, culture, and heritage offerings available in the district (52%) was highest among Māori.

EUROPEAN/PĀKEHĀ

EXPRESSION OF CULTURE*
- Participate, perform, or attend: 75%
- Use language: 63%
- Express without exclussion: 84%

SATISFACTION WITH**
- Celebration of tangata whenua: 25%
- Arts, culture, and heritage offerings: 46%

ETHNIC MINORITIES

EXPRESSION OF CULTURE*
- Participate, perform, or attend: 64%
- Use language: 74%
- Express without exclusion: 68%

SATISFACTION WITH**
- Celebration of tangata whenua: 29%
- Arts, culture, and heritage offerings: 41%

MĀORI

EXPRESSION OF CULTURE*
- Participate, perform, or attend: 57%
- Use language: 79%
- Express without exclusion 57%

SATISFACTION WITH**
- Celebration of tangata whenua: 31%
- Arts, culture, and heritage offerings: 52%

OTHER

EXPRESSION OF CULTURE*
- Participate, perform, or attend: 50%
- Use language: 0%
- Express without exclusion: 74%

SATISFACTION WITH**
- Celebration of tangata whenua: 11%
- Arts, culture, and heritage offerings: 37%

**Please note that these results show the total agree result.*
***Please note that these results show the total satisfied result.*

Belonging: **Intention to Stay**

Eighty one percent of respondents indicated that they were intending to stay in the district while 5% were not intending to stay. Fourteen percent were unsure if they would stay.

INTENDING TO STAY

81% YES

5% NO

14% MAYBE

INSIGHTS

Those who had an income of over $200,000 (92%) or had sufficient levels of disposable income (91%) were more likely to intend to stay in the district.

Concurrently, those with an income of under $40,000, had no disposable income, or who could not cover their expenses were less likely to intend to stay in the district.

Those who were comfortable with the growth of resident and tourist numbers were more likely to intend to stay in the district.

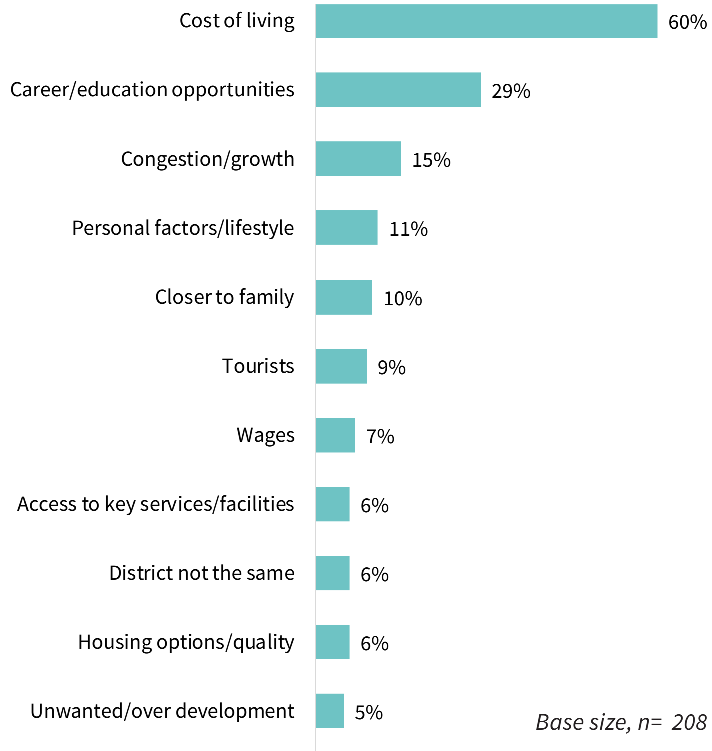
Belonging: **Intention to Stay**

In 2019, 54% of residents were intending to stay for more than 10 years while 14% were looking to move within 4 years. This is similar to what was seen in 2018. Residents who were intending to leave noted that the cost of living (60%), career or education opportunities (29%), and congestion or growth (15%) were the key factors influencing them to leave the district.

INTENDED LENGTH OF STAY (YEARS)

	2018	2019
10+	63%	54%
5-9	6%	6%
2-4	8%	6%
Under 2	5%	8%
Don't know	18%	27%

LEAVING INFLUENCERS*



Base size, n= 208

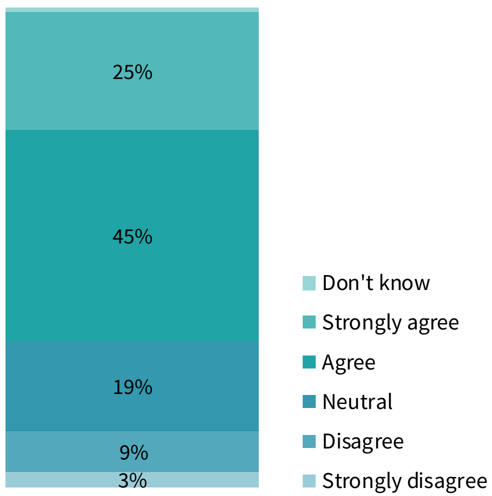
**Please note, results 5% and over are shown*

Belonging: **Pride**

Seventy percent of respondents either agreed (45%) or strongly agreed (25%) that they felt a sense of pride in the district. This is a decrease of 8% compared to 2018 (78%).

Participants were asked to name their favourite place in the district. Responses were coded into broad codeframes to reveal that being beside the lake (27%) and using various tracks and trails (27%) were the top places indicated. When asked why respondents favoured a particular place, physical features (82%), location (70%), and types of people (34%) were the key elements noted.

I FEEL A SENSE OF PRIDE IN THE DISTRICT

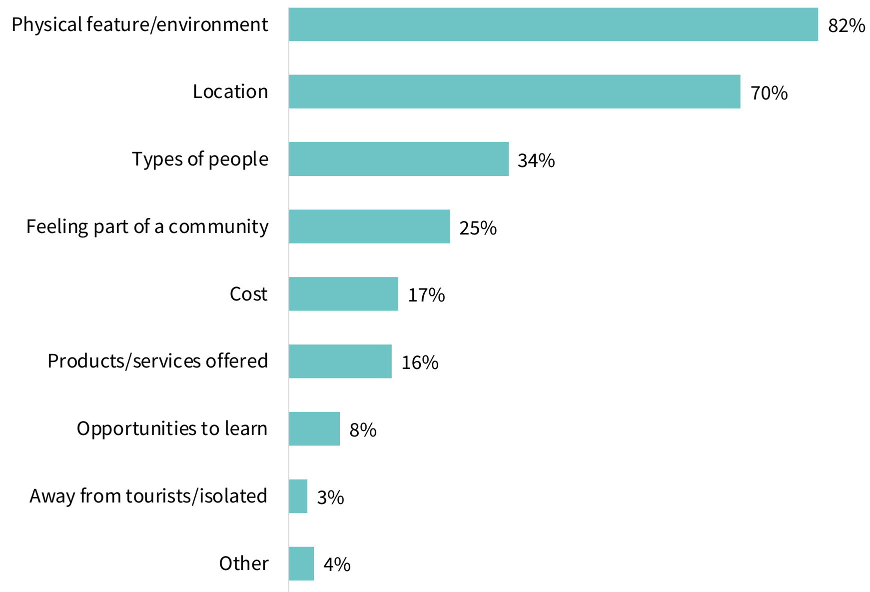


Total agree 2018, 78% c.f. 2019, 70%

FAVOURITE PLACE IN THE DISTRICT (TOP 5)

27%	By the lake
27%	Track/trails
14%	Mountains
10%	Home
9%	Outdoors

REASONS FOR FAVOURITE PLACE



Belonging: **Insights**

FEELS A SENSE OF PRIDE IN THE DISTRICT

Those aged 65 and older were statistically more likely to feel a sense of pride in the district. Although not statistically significant, Māori were well represented in this group.

This group tended to express a sense of positivity or satisfaction over a range of different offerings and services throughout the district.

For example, those who indicated a sense of pride in the district had statistically higher job satisfaction across all scales measured and were more likely to be satisfied with the quality of several facilities (e.g. playgrounds, museums, and libraries etc.). They were also more likely to be involved with their neighbourhood or satisfied with their neighbourhood characteristics. Respondents who were satisfied with the cultural offerings in the district and the celebration of tangata whenua were significantly more likely to feel a sense of pride in the district.

Findings also revealed that those who felt a sense of pride in the district were statistically more likely to intend on staying in the district, suggesting that what appears to be the drivers behind their pride is in fact the same thing keeping them here.

DOES NOT FEEL A SENSE OF PRIDE IN THE DISTRICT

While not statistically significant, highest portions of respondents who were less inclined to feel a sense of pride in the district were those aged 18-29 and those belonging to the ‘other’ ethnic group.

Results showed that those who did not have a sense of pride in the district were more likely to show signs of dissatisfaction across a variety of community related characteristics and concurrently, were less likely to intend on staying in the district.

Findings revealed that engagement in, and satisfaction with, their neighbourhood and its characteristics was significantly lower amongst this group. Dissatisfaction was also statistically higher with cultural aspects of the district, as this group was more likely to be dissatisfied with the arts and cultural offerings, as well as the celebration of tangata whenua. Those who expressed that they did not feel pride in the district were also more likely to disagree that their wellbeing was important to their employer, and that they have learnt adaptable skills within the last twelve months in their current job.

Belonging: **Social Networks**

The highest amount of respondents indicated that they are connected to a sport or recreational group in the district (37% c.f. 2018, 44%). This was followed by 16% of respondents who said they were associated with an environmental or conservation network (c.f. 2018, 19%), and a further 15% who noted that they were linked to a local community association (c.f. 2018, 17%).

SOCIAL NETWORKS AND CONNECTIONS

	2018	2019
Sport/recreation	44%	37%
Environmental/ conservation	19%	16%
Local community association	17%	15%
Business network group	16%	14%
Art/music/theatre	14%	13%
Health/wellbeing	20%	12%

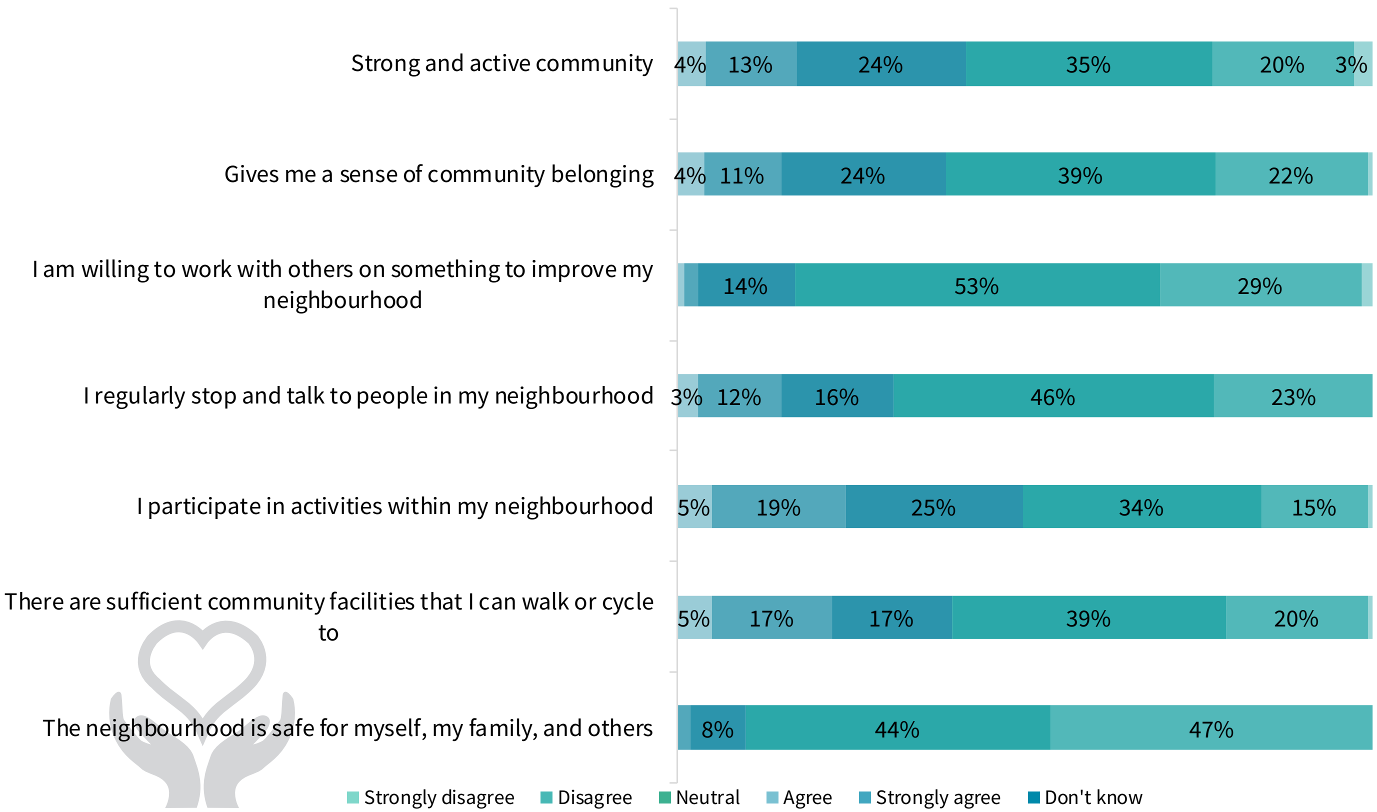
	2018	2019
Education/training	15%	10%
Childcare/playgroup/ activities for children	11%	9%
Community support/ advice/advocacy	8%	8%
Religion/faith/ spiritual	8%	8%
Other creative	7%	6%
Literature/books	11%	6%

	2018	2019
Online communities/ gaming	9%	6%
Civil defence/emergency management	5%	6%
Culture/heritage	7%	4%

Belonging: **Neighbourhood**

Most respondents agreed that their neighbourhood was safe for themselves and others (91%), with 44% indicating they agreed and another 47% indicating they strongly agreed. This was followed by a participant's willingness to work with others to improve their neighbourhood, where 82% either agreed (53%) or strongly agreed (29%) that they were willing to do so. Year on year findings showed that the results for 2019 tended to be on par with 2018.

NEIGHBOURHOOD CHARACTERISTICS



TOTAL AGREE YEAR ON YEAR

2018	2019
58%	55%
63%	61%
82%	82%
68%	69%
50%	49%
61%	59%
N/A	91%

Belonging: **Summary**

Results showed that nearly a quarter of participants identified with a particular culture, yet when asked which culture they identified with, almost all referenced a particular ethnic group or religion. This suggests that the lines between culture, ethnicity, and religion are blurred. However, it is positive that the majority of culturally identified respondents noted that they can express their culture without feeling excluded as this contributes to their sense of belonging in the district.

It is worth noting that financial pressures are impacting respondents' abilities to remain and belong in the district. That is, the cost of living was seen as the main influence of deciding to leave the district.

While a large proportion of residents expressed a general sense of pride in the district, this year saw a decrease in compared to 2018. Those belonging to the younger age brackets were more likely to disagree that they felt a sense of pride in the district. With a higher proportion of younger people represented this year, this could be one of the possible explanations for the decrease seen.

When reviewing verbatim comments relating to belonging in the district it was clear that there is a yearning amongst respondents to establish a sense of community, but some face a key challenge in doing so.

"Airbnb has destroyed the neighbourhood… these visitors don't care as much about their neighbours and have no community spirit. They're here for the good view and the outdoors only!"

"A lot of the houses that used to be rented by long-term residents are now either seasonal workers or Airbnb, so it is difficult to create a sense of community when the neighbourhood is very transient. There are some long-term locals, but they're easily outnumbered."

"A number of houses in my neighbourhood are holiday homes or rented out which makes it difficult to get to know people."

"Neighbourhood consists of 50% empty houses, transient seasonal renters, or Airbnb. Hard to have a community under such circumstances."

The above comments suggest that tourism is the underlying barrier to so many resident's ability to cultivate a 'community' of sorts. Tourism is likely the greatest driver of the district's transient nature, thus making it difficult for settled residents to build relationships and a sense of community.

While it is clear many people are struggling to find some community spirit, it is worth highlighting that many residents are extremely satisfied with their neighbourhoods.

"I feel lucky to live in Arthur's Point. Very local community who are engaged and welcoming."

"Hawea Flat is great."

"Bob's Cove is a small place and struggles to score points with public services, but it has a strong community."

"Arrowtown has an amazing community and is a wonderful place to live."

Belonging: **Summary**

It is interesting that positive comments tended to name where they lived. The mix of comments made regarding a sense of community make it clear that it is neighbourhood dependant where such a spirit is more 'alive.' Given the outlined struggles some neighbourhoods face, it is likely that the areas which tend to get saturated with tourists have a greater difficulty in fostering the same sense of cohesion.

Services, Facilities, and Governance

THIS SECTION FOCUSES ON HOW SATISFIED RESIDENTS ARE WITH THE QUALITY AND QUANTITY OF VARIOUS FACILITY OFFERINGS AS WELL AS RESIDENTS SATISFACTION WITH VARIOUS COUNCIL MEASURES. KEY FINDINGS SHOWED THAT RESIDENTS WERE SATISFIED WITH THE QUALITY AND QUANTITY OF FACILITIES IN THE AREA.

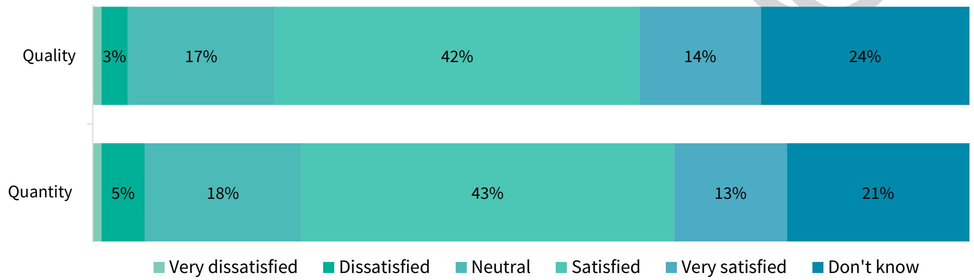
Services, Facilities, and Governance: **Use**

The following pages show the use of various facilities throughout the district, as well as the satisfaction with the quality and quantity of those same facilities.

Regular use (daily, weekly, and monthly use) was highest for trails, walkways, and cycleways (88% c.f. 2018, 84%). Results showed that overall satisfaction with the quality of facilities was highest for parks, reserves, and gardens (90% c.f. 2018, 92%), while satisfaction with quantity was highest for libraries (80% c.f. 2018, 76%) and parks, reserves and gardens (80% c.f. 2018, 80%).

SPORTS GROUNDS

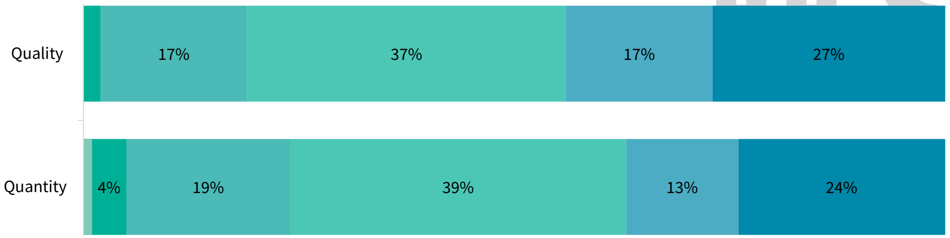
2%	Daily
20%	Weekly
11%	Monthly
30%	Few times a year
37%	Never



Services, Facilities, and Governance: **Use**

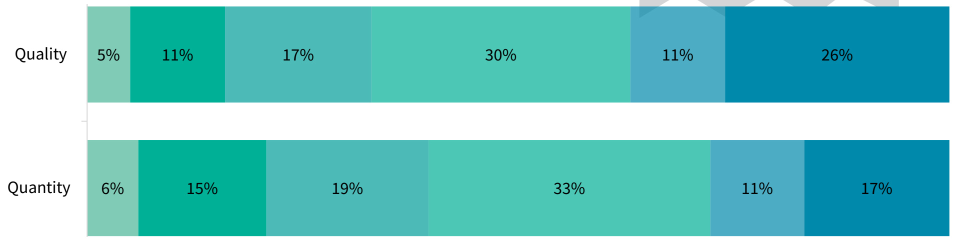
PLAYGROUNDS

2%	Daily
14%	Weekly
12%	Monthly
25%	Few times a year
47%	Never



SWIMMING POOLS

2%	Daily
15%	Weekly
12%	Monthly
30%	Few times a year
41%	Never



Very dissatisfied · Dissatisfied · Neutral · Satisfied · Very satisfied · Don't know

Services, Facilities, and Governance: **Use**

PARKS, RESERVES, AND GARDENS

16% Daily

42% Weekly

21% Monthly

18% Few times a year

3% Never

PUBLIC TOILETS

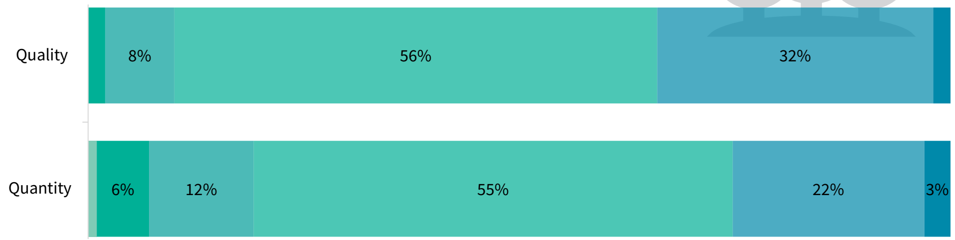
2% Daily

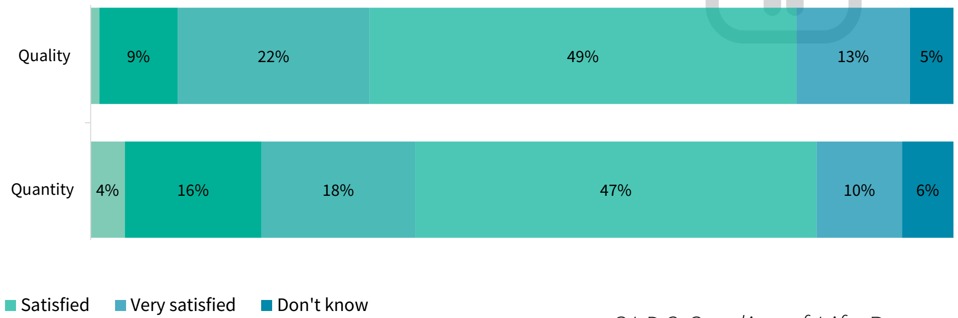
25% Weekly

27% Monthly

38% Few times a year

8% Never





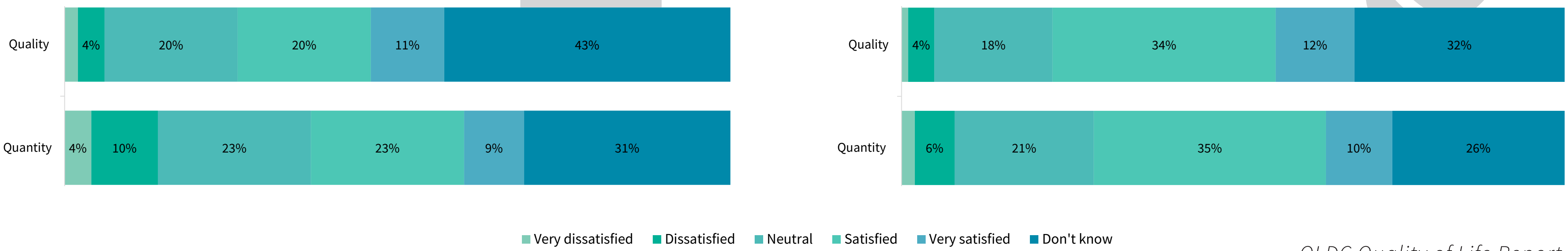
Services, Facilities, and Governance: **Use**

MUSEUMS

0%	Daily
1%	Weekly
3%	Monthly
35%	Few times a year
61%	Never

INDOOR SPORTS FACILITIES

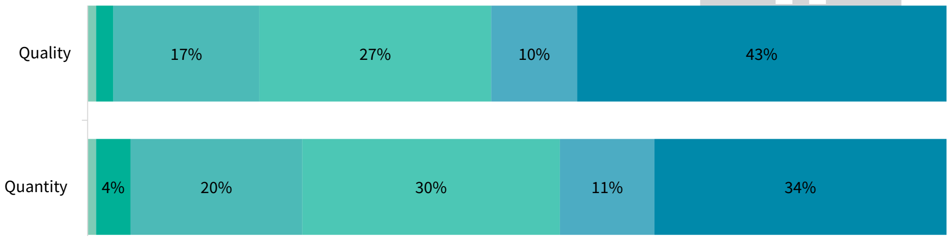
2%	Daily
17%	Weekly
10%	Monthly
27%	Few times a year
44%	Never



Services, Facilities, and Governance: **Use**

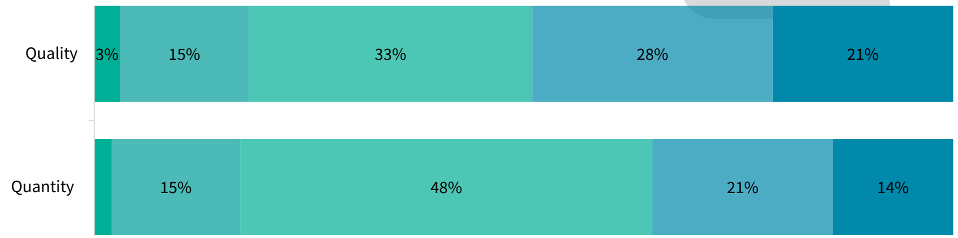
GYMS

9%	Daily
17%	Weekly
4%	Monthly
11%	Few times a year
59%	Never



LIBRARIES

1%	Daily
17%	Weekly
19%	Monthly
32%	Few times a year
31%	Never

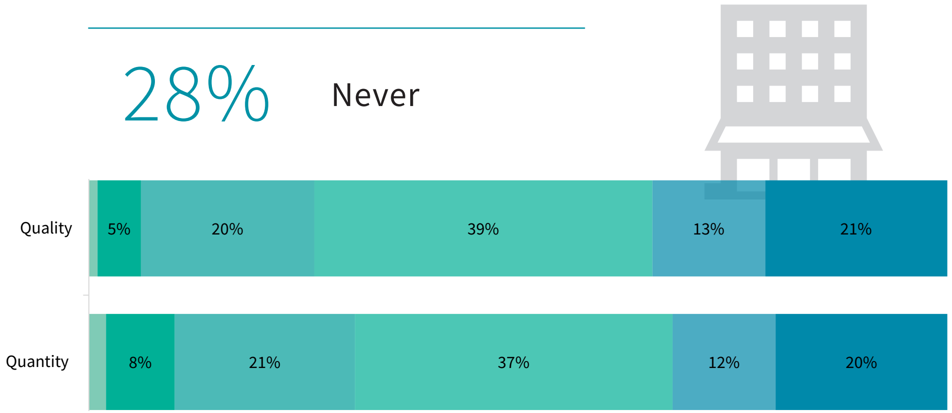


Very dissatisfied Dissatisfied Neutral Satisfied Very satisfied Don't know

Services, Facilities, and Governance: **Use**

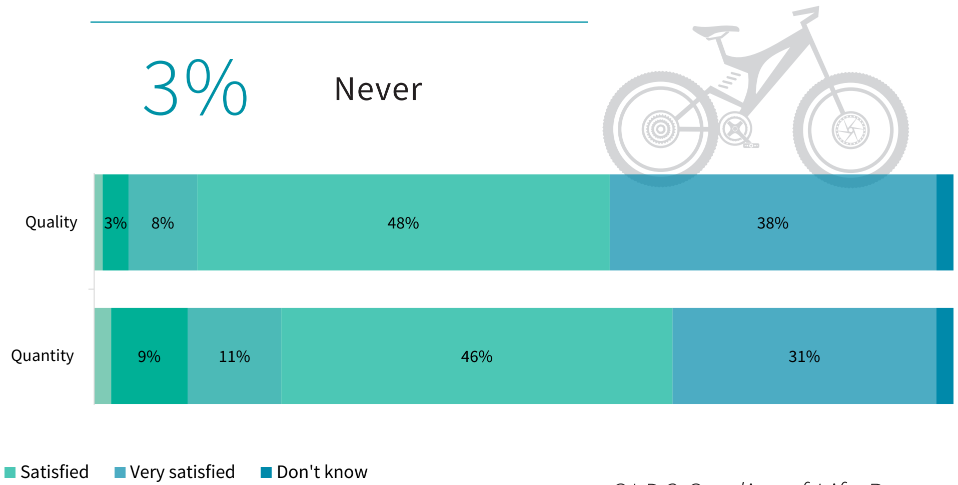
COMMUNITY HALLS

1%	Daily
5%	Weekly
13%	Monthly
54%	Few times a year
28%	Never



TRAILS, WALKWAYS, AND CYCLEWAYS

29%	Daily
44%	Weekly
15%	Monthly
9%	Few times a year
3%	Never



Services, Facilities, and Governance: **Year on Year Comparison**

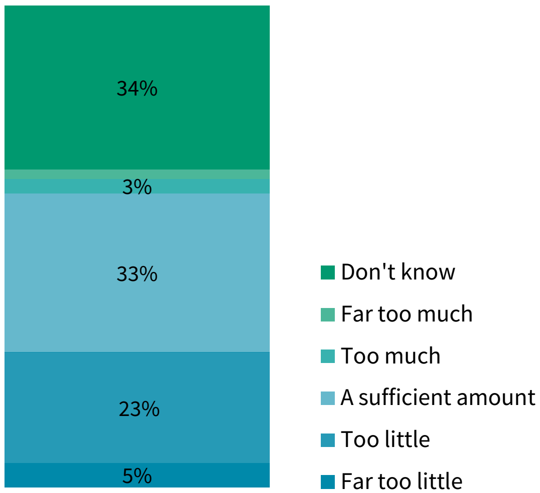
MEASURE*	2018 USE**	2019 USE**	2018 QUALITY	2019 QUALITY	2018 QUANTITY	2019 QUANTITY
Sports grounds	26%	33%	78%	73%	71%	70%
Playgrounds	26%	28%	82%	74%	73%	68%
Swimming pools	31%	29%	76%	55%	70%	53%
Parks, reserves, and gardens	83%	79%	92%	90%	80%	80%
Public toilets	50%	54%	71%	66%	54%	60%
Museums	3%	4%	72%	55%	63%	46%
Indoor sports facilities	33%	29%	77%	67%	64%	60%
Gyms	27%	30%	72%	65%	68%	63%
Libraries	36%	37%	82%	77%	76%	80%
Community halls	14%	19%	71%	66%	67%	61%
Trails, walkways, and cycleways	84%	88%	91%	88%	82%	79%

**Please note, don't knows have been removed for year on year comparisons and percentages re-proportioned accordingly. Results show the total satisfied.*
***Please note that use has been measureD based on daily, weekly, and monthly use of the facilities.*

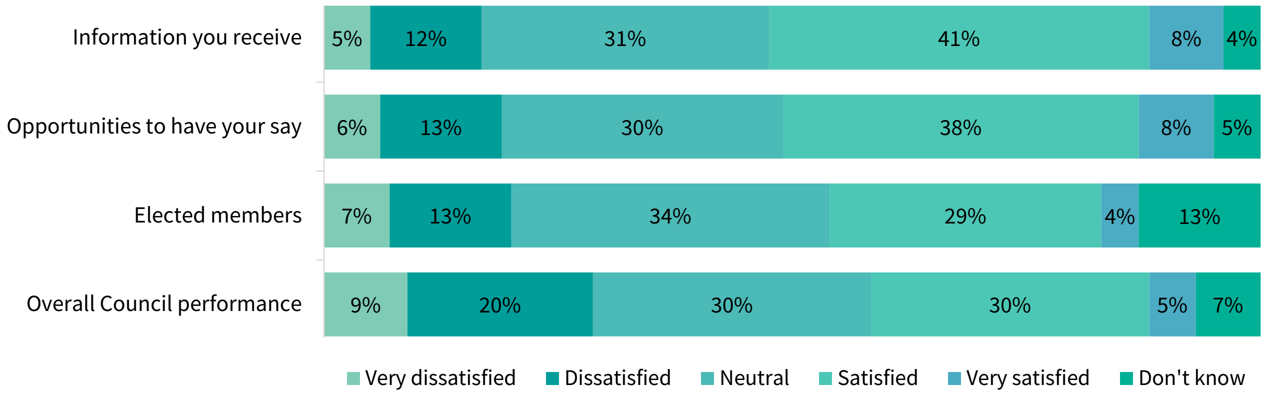
Services, Facilities, and Governance: **Council Input**

Thirty three percent of respondents said that there was a sufficient amount of money going towards community groups in the district.
Participants were most satisfied with the information they recieve from Council with 49% indicating that they were either satisfied (41%) or very satisfied (8%). With the exclusion of don't know responses there was a decrease of 9% in satisfaction since 2018 (59% c.f. 2019, 50%).

MONEY TOWARDS COMMUNITY GROUPS



COUNCIL PERFORMANCE MEASURES



COUNCIL PERFORMANCE MEASURES*	2018	2019
Information you receive	59%	50%
Opportunities to have your say	58%	48%
Elected members	44%	38%
Overall Council performance	43%	37%

**Please note these results have had 'don't know' responses removed and have been reproportioned accordingly. Results indicate total satisfied.*

Services, Facilities, and Governance: **Summary**

Results showed that for the most part, the majority of residents are satisfied with the quality and quantity of facilities throughout the district. However, lower satisfaction was seen for Council related measures.
When reviewing the open-ended comments, many referenced positive and/or constructive feedback.

Positive comments were varied but nonetheless provided reassurance that the district is heading in the right direction. However, there was also recognition that positive growth/change was occurring and that people need to embrace this in their communities.

"Happily, we are progressing at a good pace. I reflect on the time when we only had one doctor, no pharmacy, and no lawyer. We have all the services we need now, including top medical services, yet in general we are still able to feel like a town, not a city."

"Great place to live. You can't stop growth so embrace the cultures and energy that help keep it a vibrant place to live and work however, we should never forget the history that created it."

"We have a beautiful district and an opportunity to make our lives richer and better if we're willing to invest and fully commit to a place worth fighting for/living in."

"I feel grateful everyday for living here and the community is amazing."

This section's verbatim comments tended to draw on a lot of the challenges identified in other sections. One of those included the infrastructural development of Queenstown and that such development was unwanted.

"Too much of our beautiful landscape is being cut up by developers."

"My beautiful district should be focused on environment, not so much on development."

"It is becoming uglier by the day due to the banal looking housing developments"

Ultimately, these comments and more like them suggest the concern that residents may have in that the district and its natural beauty or qualities are being taken over by man-made infrastructure.

Though it was more common for responses to express concern with such development, some respondents expressed they were okay with development, but that it needed to keep up with the rate of growth in the district.

"It is growing very rapidly, infrastructure needs to keep up with development."

Services, Facilities, and Governance: **Summary**

Other comments continued to reference the cost of living in the district with particular focus on the expense of living in the district. These issues appeared to be prominent among young families and those aged 18-29 typically due to additional financial commitments and lower wages to cover basic living costs.

> *"It is expensive. Goodness knows how young families survive."*
>
> *"Great place to live and bring up a family but it is getting harder for young people to afford to live here."*

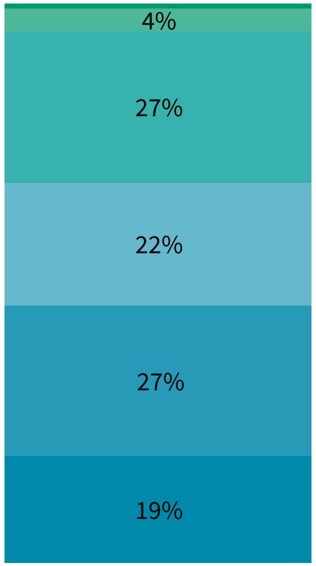
Tourism

THIS SECTION FOCUSES ON TOURISM IN THE DISTRICT AND RESIDENTS' PERCEPTIONS OF THE IMPACTS IT IS HAVING. MORE SPECIFICALLY, IT LOOKS AT TOURISM GROWTH, THE BENEFITS IT BRINGS TO THE DISTRICT, AND WHAT TOURISTS OUGHT TO KNOW ABOUT THE DISTRICT. FINDINGS SHOWED THAT MANY RESIDENTS WERE STRUGGLING WITH THE NUMBER OF TOURISTS IN THE AREA.

Tourism: **Growth**

Thirty one percent of participants indicated that they were satisfied with the growth of resident numbers in the district which was on par with 2018 (31%). Findings showed that just 24% of respondents were comfortable with the growth of visitor numbers in the district, this is similar to 2018 (25%). This shows that over half are uncomfortable with visitor numbers.

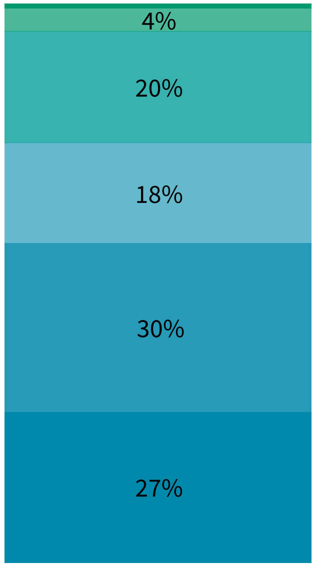
COMFORTABLE WITH GROWTH OF RESIDENT NUMBERS



31% Total agree, 2018

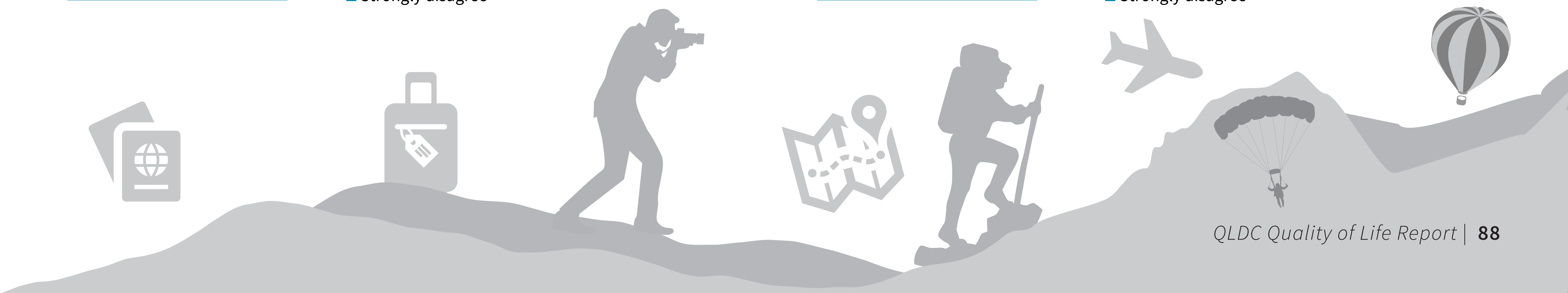
31% Total agree, 2019

COMFORTABLE WITH GROWTH OF VISITOR NUMBERS



25% Total agree, 2018

24% Total agree, 2019



Tourism: **Insights**

COMFORTABLE:

Males were statistically more likely to be comfortable with the growth of visitor numbers in the district. Although not statistically significant, Māori respondents and/or those aged 30-44 had the highest proportion of participants who were comfortable with such growth.

Respondents intending to stay in the district were statistically more likely to be comfortable with the growth in visitor numbers, along with those who had no concern with climate change, and those who were satisfied with QLDC measures in protecting the environment. Interestingly, this group also tended to feel as though issues such as dangerous driving, alcohol and drug related anti social behaviours, and litter and dumping rubbish were being adequately addressed.

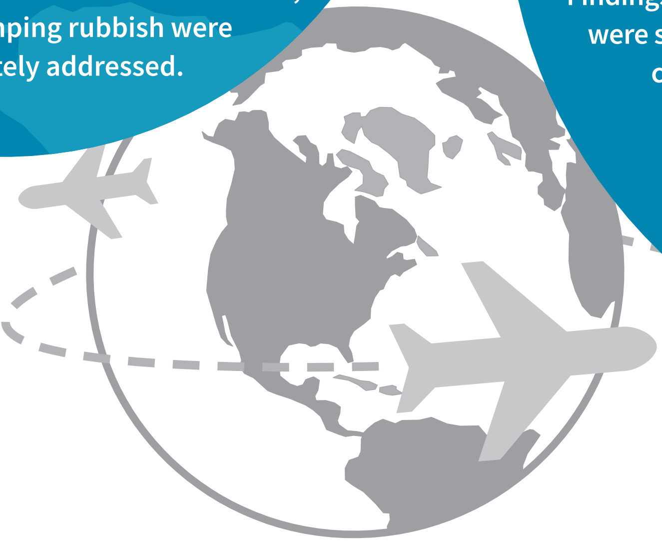
UNCOMFORTABLE:

Respondents uncomfortable with the growth of visitor numbers in the district were statistically more likely to be European or Pākehā. While not statistically significant, females and/or those aged 45-64 or 65+ were also more likely to be uncomfortable with visitor number growth.

Results showed that participants who have lived in the district for 10 years or more were more likely to be uncomfortable with the growth of visitor numbers, suggesting that perhaps they themselves have witnessed and experienced the side effects of the visitor growth during their time residing in the district. Interestingly and perhaps consequently, those uncomfortable with such growth are also more likely to not intend to stay in the district.

Findings also showed that those uncomfortable with the number of visitors were statistically more likely to be concerned with the impact of climate change on the district and dissatisfied with QLDC measures in protecting the environment.

This group was more likely to say that issues such as dangerous driving, alcohol and drug related anti-social behaviour, and litter and dumping rubbish have not been adequately addressed.



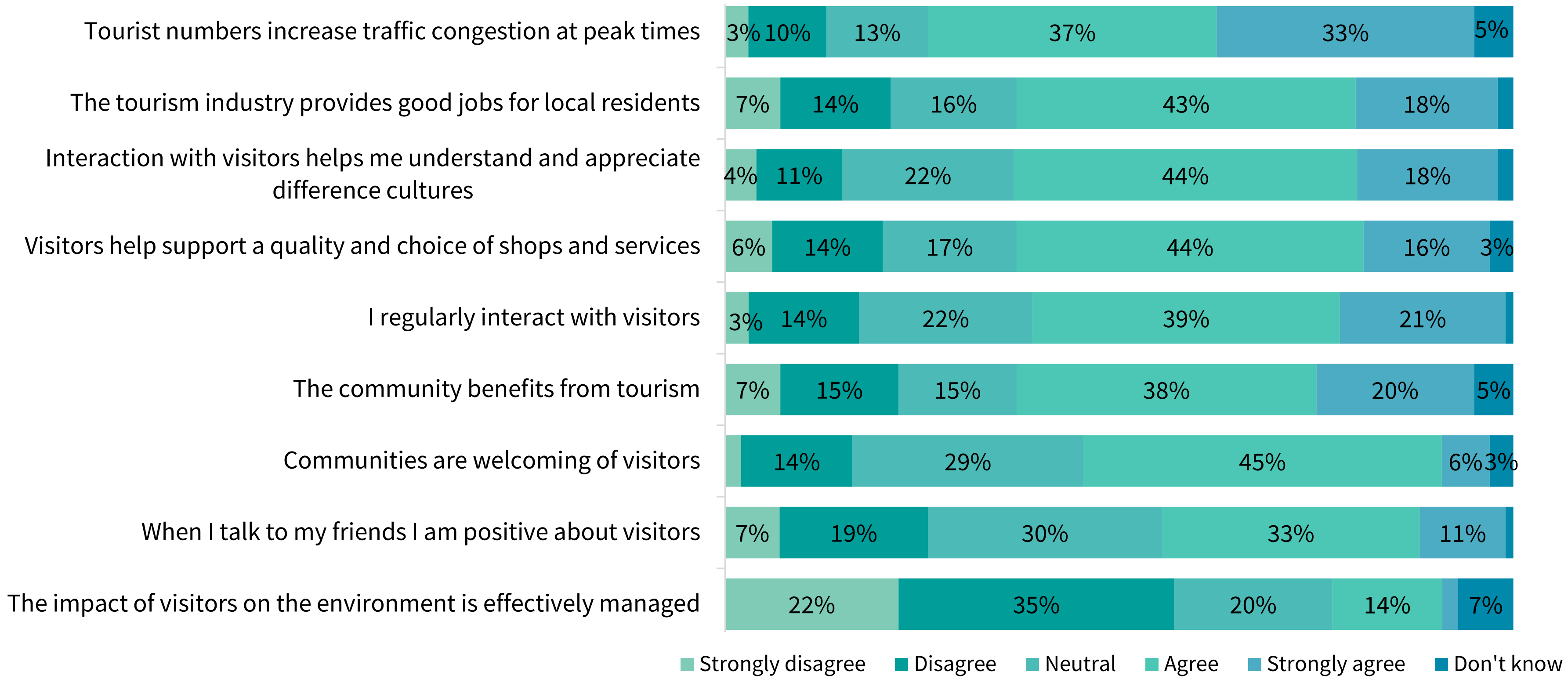
Tourism: **Tourism and the District**

Most respondents agreed that tourist numbers increased traffic congestion at peak times with 70% either agreeing (37%) or strongly agreeing (33%) with this statement.

Sixty one percent of respondents either agreed (43%) or strongly agreed (18%) that the tourism industry provides good jobs for the residents and a further 62% also agreed (44%) or strongly agreed (18%) that interactions with visitors helps residents to understand and appreciate different cultures.

Most important to point out is that over half (57%) of respondents felt that the impact of visitors on the environment was not being effectively managed.

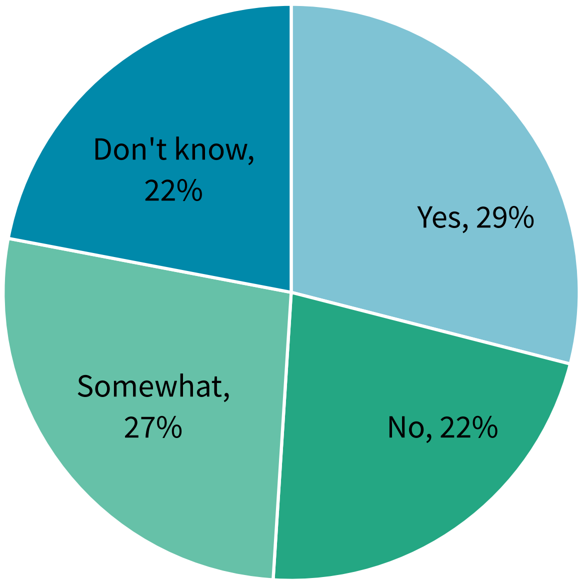
TOURISM AND THE DISTRICT



Tourism: **Responsible Camping**

Forty nine percent of respondents in 2018 Quality of Life Survey noted that freedom camping was a significant problem. This year, 29% of participants said there has been a decrease in freedom camping issues, nearly half (49%) noted that matters have not improved (22%) or that they have only somewhat improved (27%). Twenty two percent were not sure whether there has been a decrease in freedom camping related issues.

DECREASE OF FREEDOM CAMPING ISSUES

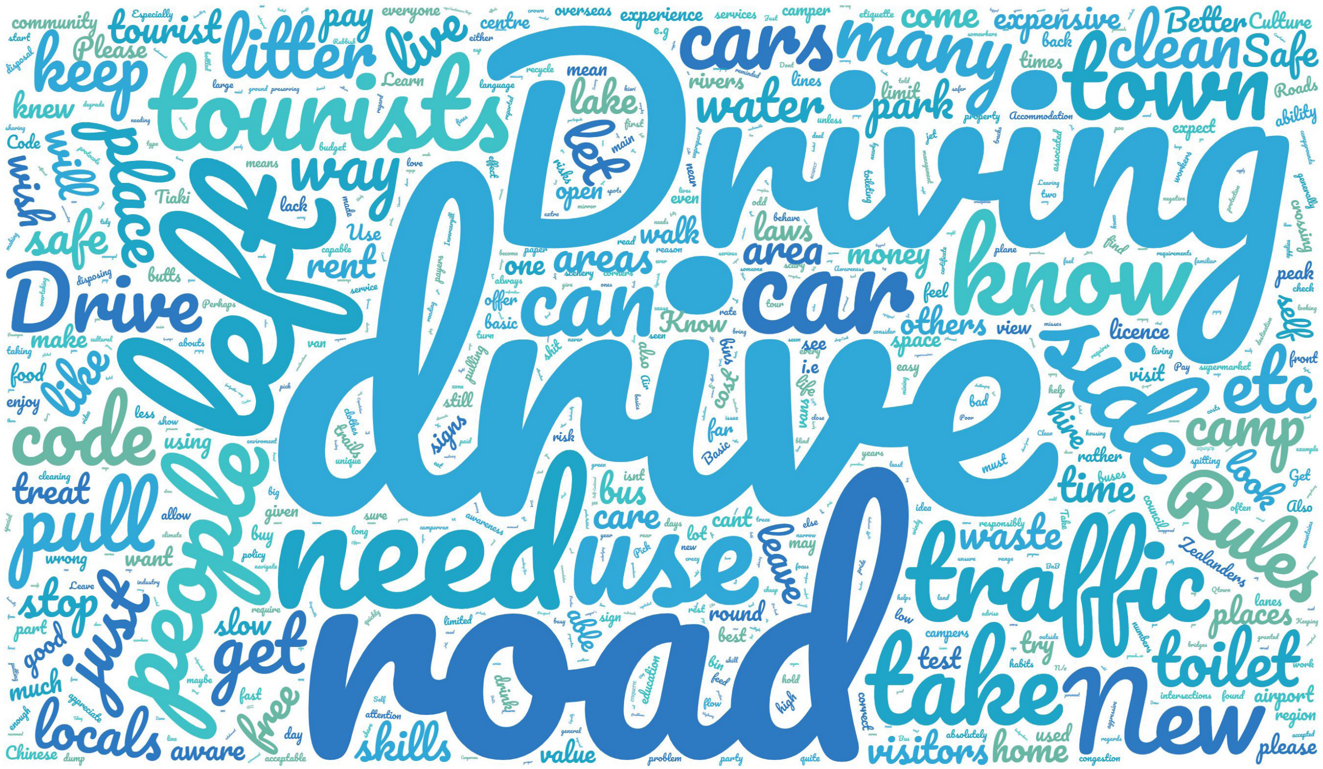


Tourism: **Tourist Information**

When asked to identify what tourists ought to know when visiting the district, the heaviest weighting was placed on the word driving or forms thereof. Respondents made reference to the need for tourists to better educate themselves on how to drive (including which side of the road to drive on) and to better acquaint themselves with the local road rules. Tourists' driving appears to be a concern of many residents with it receiving a high mention from respondents when asked what safety issues in the district needed addressing.

While not as prominent, residents also felt that tourists need to know and learn how to take better care of, and respect the district's environment. It was made clear earlier that, for the most part, the district's residents are concerned with the preservation of the environment and this same theme has also been noted here.

TOURIST INFORMATION



Tourism: **Summary**

The overall theme identified across a range of different measures was that respondents felt there are too many tourists in the area. However, perhaps more important and relevant is the impact which residents feel this is having on their district. Open ended comments revealed quite consistent themes and concerns of participants around this.

> *"We don't need any more tourists."*

Comments revealed that many respondents felt as though the wellbeing of residents is being put on the backburner of tourists' needs.

> *"It feels like Queenstown is more built for tourists than local people. I understand tourism provides lots of jobs, and is our main source of income, but Council seems to be so focused on tourists that it forgets this place is home for many of us."*
>
> *"Don't forget the locals that call this place home and have for a long time, well before it was overcrowded with tourists."*
>
> *"Queenstown is based on tourism and it is here to stay but the money it brings into the district does not appear to benefit the community, only the businesses. Staff are often underpaid, undervalued, and therefore transient."*

Other comments made references to the impact tourism is having on the district's natural environment. This includes the over development of facilities to cater for and facilitate tourism in the district.

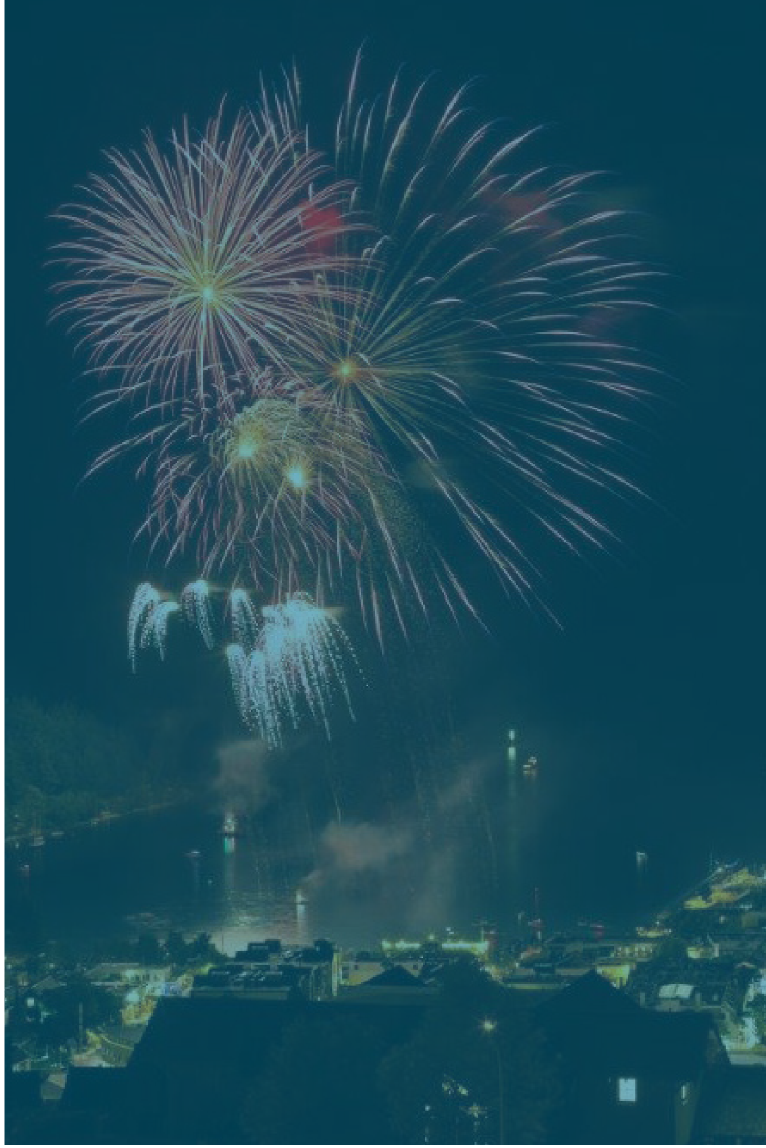
> *"The hordes of tourists are impacting our environment and changing the experience for locals, and the visitors themselves."*
>
> *"I think the rate of development, and associated increase in tourist and resident numbers in Queenstown and Wanaka, has got to a level that these iconic towns have actually been spoilt, and tourists may well prefer to go elsewhere instead."*
>
> *"Our magnificent scenery is just as important as man-made tourist options."*
>
> *"Respect the natural beauty of the town. If we become too urbanised with too many retail parks and high-rise buildings, we will ruin what we have. It is one of the most beautiful places in the world, but in 12 years of visiting and living here the region has changed and not for the better."*

While of course, not all respondents necessarily held negative views towards tourism or tourists, there is a clear desire amongst participants that tourism and the growth of it could be better managed to ensure residents' safety and needs are the priority. Consideration also needs to be given to the conservation of what makes the district so appealing in the first place, its natural beauty.

It is worth noting that these results show early signs of negative sentiments towards the tourism industry as a result of the negative associations with the number of tourists. Maintaining acceptance and support of the tourism industry by locals will be important in sustaining the economic prosperity it currently provides the district.

Quality of Life

THIS SECTION FOCUSES ON THE OVERALL QUALITY OF LIFE OF RESIDENTS WITHIN THE QUEENSTOWN LAKES DISTRICT. RESULTS REVEAL THAT THE MAJORITY OF RESPONDENTS ENJOY AN OVERALL GOOD QUALITY OF LIFE.

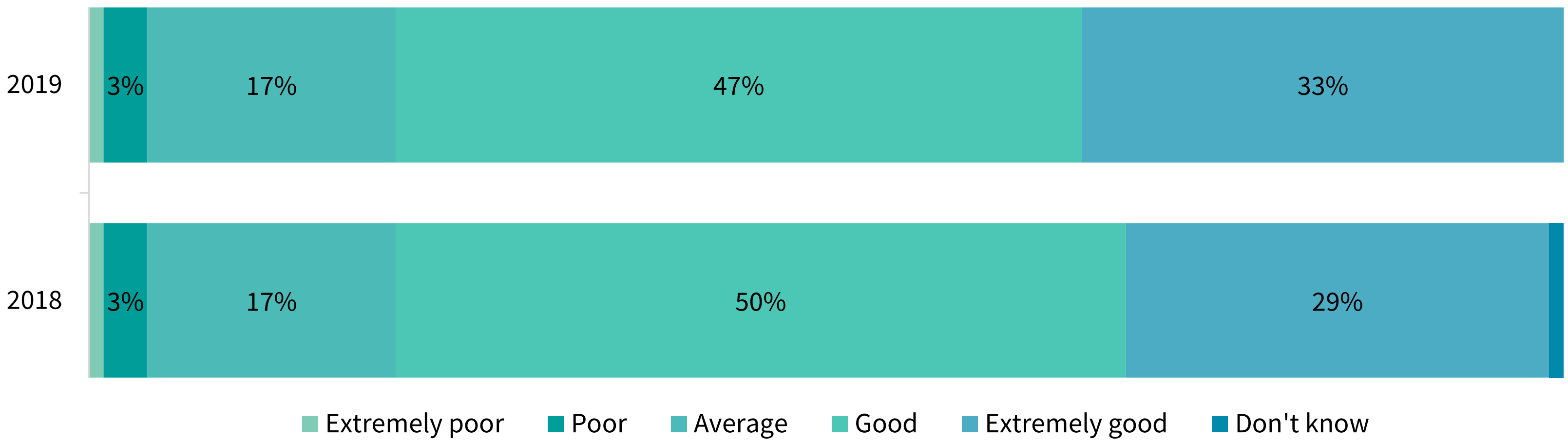


Quality of Life: **Overall Quality of Life**

Eighty percent of respondents rated their quality of life as either good (47%) or extremely good (33%) compared to 2018 where 79% of participants rated their quality of life as good (50%) or extremely good (29%).

Results showed that 4% of respondents felt that their quality of life was either poor (3%) or extremely poor (1%). This is on par with 2018 (4%).

SATISFACTION WITH OVERALL QUALITY OF LIFE



Quality of Life: **Profile**

POOR & EXTREMELY POOR:

A common theme running through those with an overall poor quality of life is that of money or lack thereof. Their ability to access services and facilities such as home heating, medical professionals, and transport are primarily driven by cost. These findings show that this group is struggling to survive in the district as their income may not provide any disposable income, let alone cover their costs. These troubling circumstances are likely to be negatively affecting their quality of life.

ABOUT US

More likely to:

- Be unable to heat their home or only sometimes be able to do so.
- Be unable to heat their home due to the affordability of heating.

DEMOGRAPHIC

More likely to:

- Be of ethnic minority.

EMPLOYMENT

More likely to:

- Be unable to cover their expenses or have no disposable income.
- Disagree that they have learnt adaptable skills in their current job.

TOURISM

More likely to:

- Be uncomfortable with the growth of resident numbers in the district.

HEALTH

More likely to:

- See cost of an appointment as a barrier to accessing medical professionals.
- Exercise 1-2 days a week.

BELONGING

More likely to:

- Disagree that they feel a sense of pride in the district.
- Not intend on staying in the district.

TRANSPORT

More likely to:

- See cost related reasons for their chosen transport mode.

Quality of Life: **Profile**

ABOUT US
More likely to:
- Rent their entire home or a room.
- Be unable to heat their home or only sometimes be able to do so.

TOURISM
More likely to:
- Be uncomfortable with the growth of resident numbers in the district.

AVERAGE:
Those with an average quality of life also tended to encounter barriers in accessing simple services and facilities such as heating and medical professionals. It is interesting that this group also tended to rent their home or rent a room, typically meaning they are likely to live with others. Perhaps their living circumstances and tendency to be around people leads to less isolation and a slightly higher quality of life despite their lower income to need ratio.

EMPLOYMENT
More likely to:
- Be unable to cover their expenses or have no disposable income.
- Have an income of under $40,000.
- Disagree that they find their work fulfilling or that their wellbeing is important to their employer.

BELONGING
More likely to:
- Disagree that they feel a sense of pride in the district.
- Not intend on staying in the district.

HEALTH
More likely to:
- See a range of barriers to accessing medical professionals (e.g. cost of treatment, location of doctor's surgery, and cost of prescriptions etc.).
- Exercise 1-2 days a week.

TRANSPORT
More likely to:
- See cost related reasons for their chosen transport mode.

Quality of Life: **Profile**

GOOD & EXTREMELY GOOD:

Those with an overall good quality of life tended to be more financially prosperous and stable, were less isolated as they tended to be in a relationship (living with their partner or spouse), had the ability to access basic services and facilities, and generally held positive sentiments towards the district. They tended to look over things that other groups were troubled with (e.g. growth in the district). Ultimately, those with a higher quality of life did not have the concerns or stresses of survival that other groups encountered.

ABOUT US

More likely to:

- Own their home.
- Live with their partner and spouse.
- Be able to heat their home.

DEMOGRAPHIC

More likely to:

- Be 65+.
- Be European /Pākehā.

EMPLOYMENT

More likely to:

- Have a sufficient level of disposable income.
- Have an income of $200,000 or more.
- Be more satisfied with their job.

TOURISM

More likely to:

- Be comfortable with the growth of visitor and tourist numbers in the district.

HEALTH

More likely to:

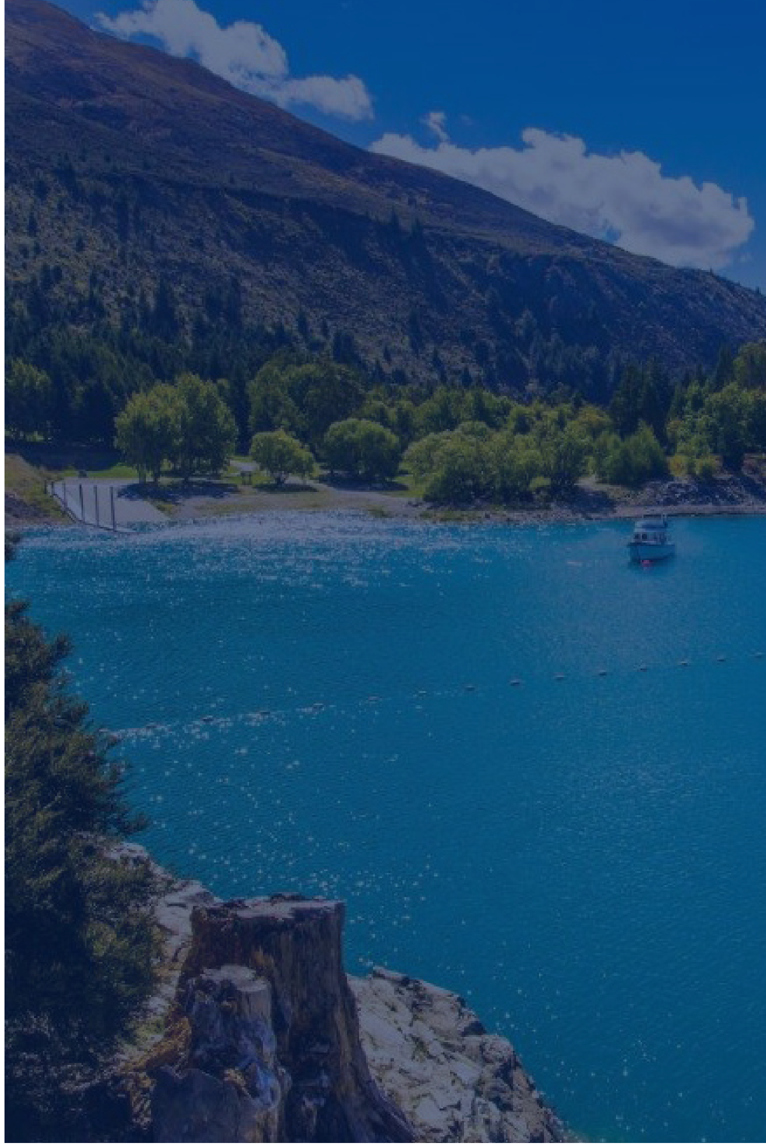
- Have nothing stop them from accessing medical professionals.
- Exercise 5-7 days a week.

BELONGING

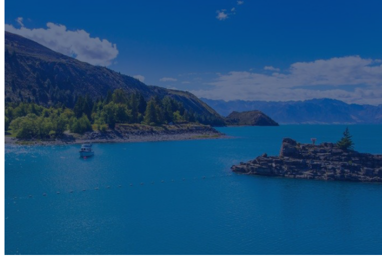
More likely to:

- Agree that they feel a sense of pride in the district.
- Intend on staying in the district.

Discussion of Findings



Discussion of Findings: **Key Themes**



Queenstown Lakes district is known for its natural environment and beauty. These qualities attract millions of tourists a year creating a unique district in both its cultural diversity and its transient nature. To this, residents in the district face unique challenges in maintaining a high quality of life. The 2019 survey looked at residents' quality of life through a range of different lenses including, but not limited to, belonging in the district, employment, facilities and services, health, and tourism. It is reassuring and positive that the results of this work show that more than three quarters of respondents rated their overall quality of life as good or extremely good, a result which is in line with that seen in 2018. However, it is still worth acknowledging the current challenges which the district and its residents are facing in hope of preserving and improving the quality of life.

The overarching concerns highlighted throughout this study can be categorised into the following three interrelated themes:

1. The financial pressures of living in the district;
2. The growth and subsequent development in the district;
3. The effects of the increase in tourist numbers on the district's communities

Comments relating to these themes were identified across a range of topics and measures throughout the survey.

Financial pressures presented itself in a range of ways. Cost related factors were the key barriers to accessing medical professionals and many participants often made mention of the insufficient wages which residents receive relative to the unique expenses associated with living in the area. The most notable mention amongst these comments was the recurring reference to rent prices being disproportionately expensive and, that buying a house for many who would typically be considering such a purchase elsewhere, was simply unattainable.

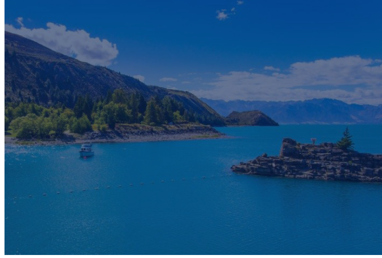
> *"It's complicated. My personal circumstance is good. Many of my friends however can't really afford to live here. They are professionals who have good jobs but just can't afford the cost of living. They can barely afford rent let alone save for a first home."*

Growth in the resident population has been cited as a catalyst for rising house prices. The rise in resident numbers has resulted in a housing shortage which has consequently driven house prices. In an attempt to alleviate this issue and to cater for such growth, the district has seen an increase in development. Such development has been met with a mix of views from residents, however the most prevalent view expressed was a genuine concern for the district's natural environment. That is, development is destroying the very thing that residents and visitors appreciate about the district.

> *"Too much development in Queenstown. It's in danger of losing the very reason people come to the region."*

Those that held this view tended to concurrently express that growth needed to slow down.

Discussion of Findings: **Key Themes**



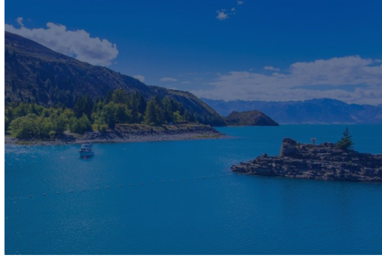
Tourist numbers in the district have also experienced growth and over half of respondents indicated discomfort with this. This same trend was identified in 2018 however, this year, this topic was explored a little more. Across a range of measures, at least one fifth of respondents indicated negative sentiments towards tourists and/or the tourism sector with over half of participants expressing that tourism growth was not being effectively managed. In saying this, animosity is not prevalent amongst all residents, with many supportive of the job provision and variety of economic offers that the sector brings.

However, the feedback highlights early indicators which suggest that the effect of an increasing numbers of tourists is becoming a more significant issue for residents, with side-effects spilling into residents' everyday lives. The primary examples residents provided which demonstrated this spill-over effect were: the increase in Airbnbs and the subsequent disjointedness of local communities; the negative impressions about refuse dumping in the district from tourists; and/or tourists' driving practices which are perceived to be putting residents at risk on the road. While these elements are primarily attributed to an increase in tourist numbers, the wider tourism industry should be mindful that the current positive perceptions of the sector generally, e.g., job provision and economic support, may be challenged if these effects are seen to be left unchecked and not considered in light of the impact they have on residents' day to day activities.

"Full time Airbnb… has a negative effect on communities. It takes liveable homes away with the consequence of more green spaces to be developed. A community can't be built if your neighbour is a tourist or the house is empty."

Financial pressures of living in the district, the growth and subsequent development in the district, and the effects of the increase in tourist numbers on the district's communities presented themselves in different forms throughout the findings. The interrelated nature of these themes needs to be considered when reviewing subsequent sub-themes of this research.

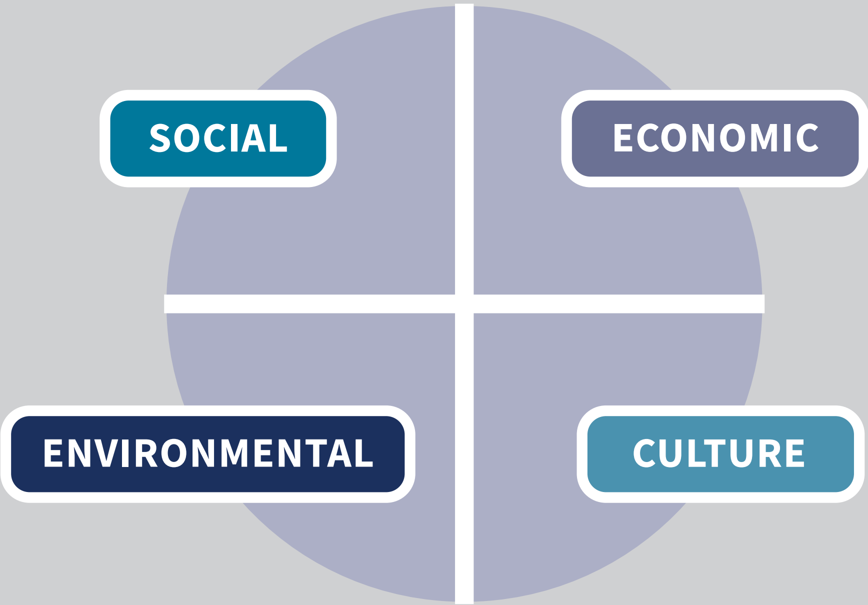
Discussion of Findings: **Wellbeings**



All of the primary themes noted this year were the same as those identified in the 2018 Quality of Life study. Given the scope of these themes, overcoming them requires long-term planning as well as the long-term articulation of such plans. By undertaking an annual Quality of Life Survey, QLDC has established its role in driving robust research regarding the wellbeing of communities. In May 2019, central government passed a bill to restore the purpose of local government "to promote the social, economic, environmental, and cultural wellbeing of communities." These elements are defined further in the graphic below:

Involves individuals, their families, whanau, hapu, iwi, and a range of communities being able to set goals and achieve them, such as education, health, the strength of community networks, financial and personal security, equity of opportunity, and rights and freedoms.

Looks at whether the economy can generate the employment and wealth necessary to provide many of the requirements that make for social well-being, such as health, financial security, and equity of opportunity.

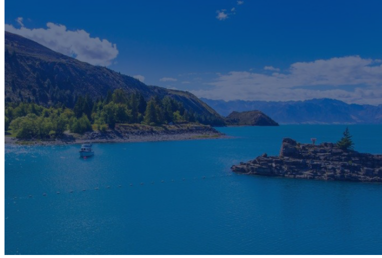


Considers whether the natural environment can sustainably support the activities that constitute healthy community life, such as air quality, fresh water, uncontaminated land, and control of pollution.

Looks at the shared beliefs, values, customs, behaviours and identities reflected through language, stories, visual and performing arts, ceremonies and heritage that make up our communities.

To this, the following discussion looks at sub-themes of the research within the context of the four wellbeings of the district. The analysis below, shows that the challenges brought to light by the research extends beyond elements which are solely within Council's roles and responsibilities. While the sub-themes have been presented within the wellbeing framework, it is hoped that all organisations in the district will use these findings to understand what elements they can control, influence, and extend an interest into.

Discussion of Findings: **Wellbeings**



SOCIAL WELLBEING

This study has highlighted a range of ways in which social wellbeing within the district might be improved. Core to this were the sub-themes of mental health services, community connectedness, and access to healthcare services.

Accessing of mental health services was proportionately higher amongst those suffering from financial pressures (those who see cost related factors as barriers to accessing mental health and those on lower incomes) and/or amongst those who identified as female. On the contrary males and/or those on higher incomes were significantly less likely to have accessed such services. However, it is important to note that these findings merely indicate access to mental health. For example, females being more likely to access such services, does not necessarily translate into females being more likely to suffer from mental health issues and vice versa. These results merely paint a picture as to the types of residents that are accessing, or who are in a position to access such services.

Residents have expressed concern regarding their abilities to connect with their community. While over half of respondents indicated that their neighbourhood gave them a sense of belonging, in relation to other neighbourhood measures, this was one of the lower scoring ones. This was particularly low for those in younger audiences. Participants have expressed what they feel is a real barrier to achieving community connectedness. That is, temporary visitors (the high number of tourists) resulting in transient neighbourhoods and communities. This is making it difficult for residents to bond with others, establish lasting relationships, and promote a sense of community. It is positive that amidst these challenges, there is also an apparent desire amongst participants to strengthen their community connectedness.

While a high proportion of respondents were registered with a doctor, this measure does not reveal the frequency at which participants access such professionals, or whether some participants are accessing them at all. Findings did show that ethnic minorities and/or those aged 18-29 were less likely to be registered with a doctor compared to those aged 45+ and/or identifying as European or Pākehā who were significantly more likely to be registered. Similarly, those aged 18-44 and/or of an ethnic minority were more likely to cite a barrier to accessing medical professionals. It is concerning that over half of respondents cited at least one barrier to accessing a medical professional with cost being related to the main ones listed.

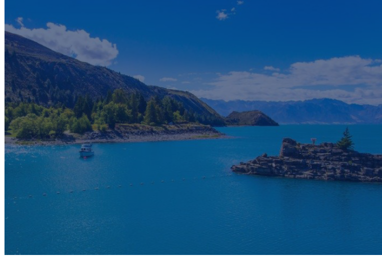
Furthermore, there was a high proportion of respondents who had travelled outside of the district for medical services. This indicates that they were doing so because such services were not accessible or available in the district. The main services accessed included specialists, surgery, and maternity care. Collectively, these findings suggest that it is a combination of both the lack of local availability and affordability which prevents better access to such services amongst relevant audiences.

ECONOMIC WELLBEING

Costs or lack of affordability were consistent sub-themes identified throughout this year's survey. However, more prevalent themes relating to economic wellbeing were the cost of housing and insufficient wages.

The cost of housing was seen as a key barrier for many respondents in enjoying financial prosperity and overall economic wellbeing. Phrases such as 'too expensive' and 'unaffordable' were used to describe the state of housing and renting prices. Many participants felt that it was blocking their ability to

Discussion of Findings: **Wellbeings**



progress financially, to the degree that many accepted leaving the district as their only option in getting ahead. Respondents who made comments relating to this often appeared to have the responsibility of a young family or around that age where they would be expecting to make traction with getting ahead financially (e.g. buying a house or being financially ‘comfortable’). This was further highlighted as those aged 30-44 were more likely to see cost of living or affordability as an influence to leave the district.

Wages and living costs were often mentioned simultaneously. That is, wages were insufficient for many participants to cover basic living costs. Some respondents expressed that typically their line of work provides a solid income stream to live off however, within the context of Queenstown Lakes district, their income was inadequate. Others indicated that they had to work additional jobs to make ends meet and survive.

These troubles were particularly seen amongst the younger age brackets and amongst young families. This is concerning for the future generations of the district. Respondents frequently suggested that a higher minimum wage could be a solution to this problem in order to minimise the disproportionate income to living costs ratio.

ENVIRONMENTAL WELLBEING

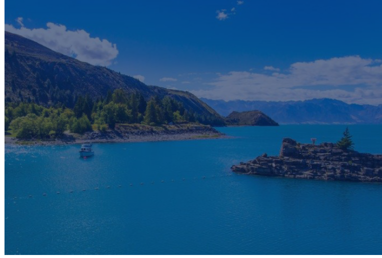
This study revealed three key sub-themes relating to the district’s environmental wellbeing. These included overdevelopment in the district, the impact of tourists on the environment, and further use of public transport.

The sub-theme of development or overdevelopment has been discussed at multiple stages throughout this report, indicating just how prevalent this topic is. It should be noted that development has not always been regarded in a negative light. In fact, some respondents are on board with it but suggest that it needs to occur at a faster rate to accommodate growth.

However, the more common opinion is that development either needs to stop or that it needs to slow down. Residents clearly love their district and a primary reason is the natural environment that surrounds them. Many comments expressed the concern that development risks losing the attraction which draws tourists, the nature. This concern is particularly interesting given the perceptions and themes around respondents’ sentiments towards tourists and tourist numbers. Ultimately, it appears that participants do not want the district to lose such a defining and natural trait for the sake of man-made developments.

Over half of respondents felt that the impact of visitors on the environment was not being effectively managed. Amongst other themes, the preservation of the natural environment was a key one noted by respondents when asked what tourists should know when they visit the district. Words such as litter, waste, and clean were often used. These references were often accompanied by an expression of concern that tourists are careless with their disposal of rubbish. Another theme noted was their use of toilets and lack thereof, ultimately resulting in the environment bearing the brunt of such waste.

One area where positive effects on the environment can be observed is the encouragement of further patronage of public transport. When looking at high, occasional, and non-users of public transport, findings showed that high and occasional users tended to have positive views across a range of public transport measures compared to non-users who tended to have negative ones. This shows that the problem is the perception of public transport rather than the functioning of public transport itself. Of course, certain areas which



are not serviced by public transport presents a problem in and of itself. It is positive that many respondents whose areas were not serviced expressed an interest in using public transport if it was available in their area. Ultimately these findings showed that this community appears open to using alternative forms of transport but that perceptions is a barrier to doing so.

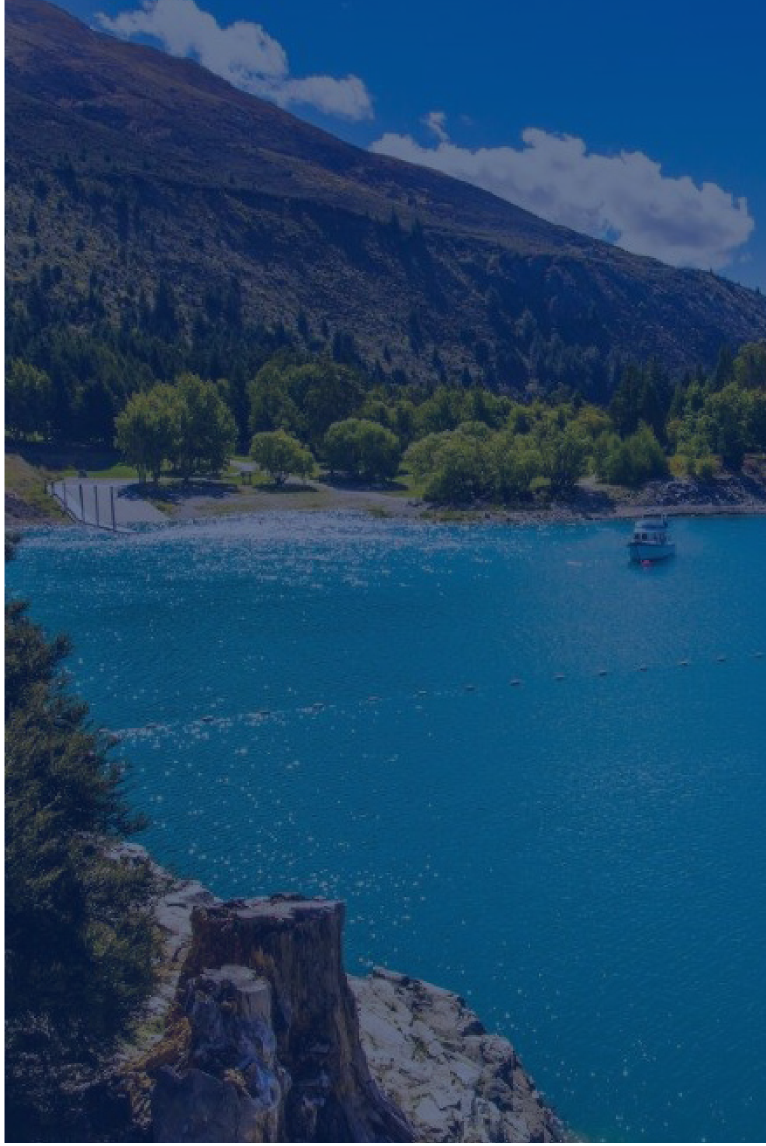
CULTURAL WELLBEING

Amidst the cultural diversity that exists within the district, it is interesting to note that some respondents identified challenges with cultural expression. In particular, the high proportion of respondents who held a neutral stance across these measures suggests that while they are not necessarily excluded from a community, there is not an overt celebration or facilitation of all peoples' cultures within the district. This finding was relevant to both Māori, ethnic minorities, and those who identified as another ethnicity.

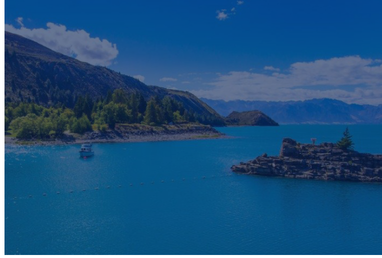
Alongside this finding, it is also noteworthy that culture was described as a range of variables, including an ethnicity, a religion, or by a country e.g., New Zealander. This suggests that peoples' understanding of the term culture is varied, and that culture is a much more complex concept to define. This may be worth exploring further amongst a community that is known for attracting such diversity.

To this, it is worth pointing out the limited responses received from Māori residents, with only 2% of responses received from residents where the population proportion is closer to 5%. However, many residents indicated a desire to further embrace or support Māori culture within the area. Indeed, less than a third of respondents indicated that they were satisfied with the celebration of tangata whenua with nearly half indicating a neutral stance on this measure. Possibly a sense of unfamiliarity with local Māori culture may lead to this neutral stance. Greater connection or awareness of local Māori history and presence may assist in growing this knowledge. In line with this, the reason behind the low response rate of Māori is something that ought to be considered in future survey work.

Appendix



Appendix



SECTION 1: ABOUT YOU

LOGIN CODE:

Q1. Which of the following best describes you? (Please select one answer)

- Male ○
- Female ○
- Gender diverse ○

Q2. Please write the year you were born:

....

Q3. What is your ethnicity? (Please select one answer)

- European/ Pākeha ○
- Māori ○
- Pacific peoples ○
- Asian ○
- Middle Eastern ○
- Latin American ○
- African ○
- Other ethnicity, please specify .... ○
- Prefer not to say ○

Q4. Were you born in New Zealand? (Please select one answer)

- Yes ○
- No ○

SECTION 2: HOUSING

Q5. Are you a resident in the Queenstown Lakes District? (Please select one answer)

- Yes ○
- No ○

Q6. Where do you live? (Only answer if you are not a resident)

....

Q7. Do you live outside the district but travel to the Queenstown Lakes District for work? (Select one only) (Only answer if you are not a resident)

- Yes ○
- No (includes holiday home owners) ○
- Other, please specify .... ○

Q8. What are your reasons for not living in the Queenstown Lakes District? (Select all that apply) (Only answer if you are not a resident)

- Affordibility ○
- Lifestyle ○
- My house in Queenstown Lakes District is a holiday home ○
- Other, please specify .... ○

(If you are a non-resident ratepayer, please answer the following question based on where you own your property within the Queenstown Lakes District)

Q9. Where do you currently live? (Select one only)

Arrowtown ○	Lake Hayes ○
Albert Town ○	Lake Hayes Estate ○
Arthurs Point ○	Luggate ○
Cardrona ○	Makaroa ○
Closeburn – Wilson Bay ○	Quail Rise ○
Frankton ○	Queenstown ○
Gibbston ○	Shotover Country ○
Glenorchy ○	Sunshine Bay-Fernhill ○
Hawea ○	Wakatipu Basin ○
Hawea Flats ○	Wanaka ○
Jacks Point ○	Central Otago District ○
Kelvin Heights ○	Other, please specify .... ○
Kingston ○	

Q10. How many years have you lived in the district? (Select one only) (If you are a non-resident ratepayer, please answer the following question by stating how long you have owned property in the Queenstown Lakes District)

Less than 1 year ○	10-20 years ○
1 to just under 2 years ○	21-30 years ○
2 to just under 5 years ○	More than 30 years ○
5 to just under 10 years ○	Other, please specify .... ○

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SECTION 2: HOUSING

Q11. Do you intend to stay in the district? (Select one only) (If you are a non-resident ratepayer, please answer the following questions based on how long you intend to retain your property within the Queenstown Lakes District)

- Yes ○
- No ○
- Maybe/ not sure ○

Q12. How long do you intend to stay in the district? (Select one only)

- Less than a year ○
- 1 to just under 2 years ○
- 2 to just under 5 years ○
- 5 to just under 10 years ○
- 10 years plus ○
- Don't know ○

Q13. What things are, or will influence your decision to leave? (Only answer if you are not intending on staying in the district or if you are unsure)

....

....

Q14. Do you rent or own your own home? (Select one only) (If you are a non-resident ratepayer, please answer the following question based on your property within the Queenstown Lakes District)

- Own ○
- Rent whole house/ apartment/ studio ○
- Rent a room ○
- Other, please specify .... ○

Q15. How long is your current rental agreement/ tenancy for? (Select one only) (Only answer if you rent your home or a room)

- Less than one year ○
- 1-2 years ○
- 3-4 years ○
- 5 years or more ○
- Unsure ○

Q16. Will you need to move house within the district in the next 12 months? (Select one only) (Only answer if you rent your home or a room)

- Yes ○
- No ○
- Maybe ○
- Don't know ○

Q17. Why will you need to move? (Select one only) (Only answer if you will or may need to move house within the district in the next 12 months)

- Lease expires ○
- Visa expires ○
- Have purchased land and will be building on the property ○
- Will purchase a property to live in ○
- Other, please specify .... ○

Q18. Do you have to move out of your rental home at specific times of the year e.g. Christmas? (Select one only) (Only answer if you need to move house AND if you live in a rental property)

- Yes ○
- No ○
- Sometimes ○
- Don't know ○

Q19. Who lives in your household? (Please select all that apply)

- Partner/ spouse ○
- Children and/ or partner's children ○
- Parent/s ○
- Parent's partner ○
- Other family relative (grandparent, siblings or in-law) ○
- Other unrelated children/ adults ○
- Other, please specify .... ○
- Prefer not to say ○

Q20. Do you supplement your income with income from a lodger or Airbnb style accommodation? (Select one answer for each row)

	Yes	No	Sometimes
Lodger	○	○	○
Airbnb style accommodation	○	○	○

Q21. Is this extra income necessary for you to cover your living costs e.g., mortgage, rent, food or bills? (Select one only) (Only answer if you do supplement your income with forms of lodging or Airbnb style accommodation)

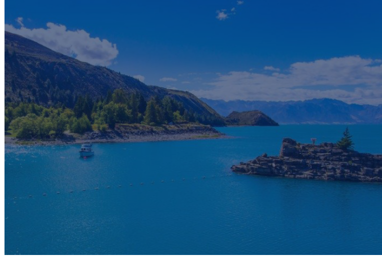
- Yes ○
- No ○
- Sometimes ○

Q22. Are you able to heat your home adequately? (Select one only)

- Yes (Go to Q24) ○
- No ○
- Sometimes ○

Queenstown Lakes District Council - Quality of Life Survey 2019 | 3

Appendix



SECTION 2: HOUSING

Q23. What are the primary reason(s) you are unable to adequately heat your home? (Please select all that apply)

The affordability of heating i.e. heating bills are too expensive	○
Lack of insulation	○
Poor window glazing	○
Lack of heat source i.e. there is nothing in your home to heat it	○
Other, please specify	○

Q24. Is there anything else you would like to add regarding housing?

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SECTION 3: EMPLOYMENT

Q25. Which of the following best describes your full household income, before tax, annually? (Only include income that applies to you and your dependants, and select one only)

Under $40,000	○
$40,001 - $60,000	○
$60,001 - $80,000	○
$80,001 - $100,000	○
$100,001 - $200,000	○
More than $200,000	○
Prefer not to say	○

Q26. We'd like to know how well your income meets your basic needs for accommodation, food, clothing, heating, bills and transport. Which one of the following best describes your household? (Select one only)

I can cover my expenses and have a sufficient level of disposable income	○
I can cover my expenses and have some disposable income	○
I can cover my expenses and have no disposable income	○
I cannot cover my expenses	○
Prefer not to answer	○

Q27. Which of the following BEST describes the kind of work you do? (Select one only)

Full time paid work	○
Part time paid work	○
Self employed	○
Caring for children (unpaid)	○
Volunteer work	○
Retired **(skip to Q32)**	○
Other, please specify	○

Q28. Do you have more than one paid job? (Select one only)

Yes	○
No	○

Q29. Do you need more than one paid job to cover your bills e.g., rent or mortgage, food, or other bills? (Select one only) (Only answer if you have more than one paid job)

Yes	○
No	○
Sometimes	○

Q30. Do you work in any of the following industries? (Select all that apply)

Accommodation and Food Services	○
Administrative and Support Services	○
Agriculture, Forestry and Fishing	○
Arts and Recreation Services	○
Construction	○
Education and Training	○
Electricity, Gas, Water and Waste Services	○
Financial and Insurance Services	○
Health Care and Social Assistance	○
Information Media and Telecommunications	○
Manufacturing	○
Mining	○
Professional, Scientific and Technical Services	○
Public Administration and Safety, including local government	○
Rental, Hiring and Real Estate Services	○
Retail Trade	○
Stay at home parent/ Carer	○
Tourism Operations e.g. Adventure tourism, ski operator, tour operator	○
Transport, Postal and Warehousing	○
Wholesale Trade	○
Other please specify	○
Retired	○
Not currently in employment	○

SECTION 3: EMPLOYMENMT

Q31. Below are some statements relating to your employment. Please indicate how much you agree with each of the following statements? (Select one per row)

	Strongly disagree	Disagree	Neutral	Agree	Strongly agree	Don't know
In my current job, I have developed skills and/or qualifications that could apply to other jobs	○	○	○	○	○	○
My wellbeing is important to my employer	○	○	○	○	○	○
I find my work fulfilling	○	○	○	○	○	○
I have learnt something new in the last 12 months (this could be a formal course or some learning you've done informally and doesn't necessarily have to be work related)	○	○	○	○	○	○

Q32. Is there anything else you would like to add regarding work and income?

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SECTION 4: HEALTH AND ACCESS TO KEY SERVICES

Q33. Are you registered with a doctor's surgery/ medical practice in the district? (Select one only)

Yes	○
No	○
Not sure	○

Q34. Does anything stop you from seeing a medical professional either a doctor or dentist? (Select all that apply)

Cannot get time of work/won't be paid if I take time off during the day	○
Cost of treatment (dentist)	○
Cost of prescriptions	○
Quality of advice given	○
Cost of an appointment (doctor)	○
Location of doctor's surgery	○
Length of wait	○
Other please specify	○
No, nothing stops me from seeing a medical professional	○

Q35. In the last 12 months, have you personally used the Emergency Department at Lakes District Hospital for an illness or injury? (Select one per row)

	Yes	No
Injury	○	○
Illness	○	○

Q36. In the last 12 months, have you used after hours services in Queenstown or Wanaka for an illness or injury? (Select one per row)

	Yes	No
Injury	○	○
Illness	○	○

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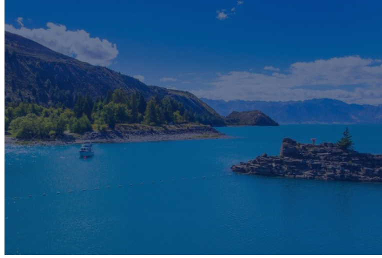

SECTION 4: HEALTH AND ACCESS TO KEY SERVICES

Q37. In the last 12 months, have you travelled outside the district for any of the following medical services? (Select all that apply)

- Mental health service or counselling
- Maternity care
- Appointment with a specialist
- Appointment with a paediatrician (children's doctor)
- Treatment such as chemotherapy
- Surgery
- Other, please specify ....
- I have not needed to travel for medical services

Q38. In the past 12 months, have you or anyone else in your household accessed any of the following mental health services? (Select one per row)

	Yes, Myself	Yes, someone else in my household	No, not at all
GP/ Doctor			
Family Centre or other community support service			
Counsellor/ Psychologist			
Child, Adolescent and Family Service (CAFS)			
Central Lakes Community Mental Health Service			
Employee Assistance Programme (EAP) service through work			

Q39. If you or someone else in your household has accessed a Family Centre or other community support service, please specify which one.

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Q40. Other than the ones mentioned, have you or anyone else in your household accessed any other mental health services in the past 12 months? (Select one only)

- Yes
- No

Q41. Please specify which one (Only answer if you have accessed any other mental health service in the past 12 months)

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Q42. On average, how many days per week do you spend time outdoors either exercising or doing another leisure activity e.g. gardening, fishing, walking, boating etc? (Select one only)

- 1 day a week
- 2 days a week
- 3 days a week
- 4 days a week
- 5 days a week
- 6 days a week
- 7 days a week
- I exercise but infrequently
- I don't exercise

SECTION 4: HEALTH AND ACCESS TO KEY SERVICES

Q43. Do you smoke one or more tobacco cigarettes a day? (Select one only)

- Yes, more than one
- No, but I occasionally smoke
- I don't smoke
- Prefer not to say
- Other, please specify ....

Q44. Smokefree means a place that is free of tobacco cigarettes but which allows the use of vaping (e-cigarettes). Do you think that the following public places should be smokefree? (Select one per row)

	Yes	No	Don't know
Children's playgrounds			
At the entrance of buildings			
Bus stops			
Outdoor eating places and restaurants, pubs or cafes			
Outdoor events e.g. music or sporting events			
Parks, reserves and sports fields			
Footpaths outside your local block of shops			
Outdoor areas in town centres e.g the mall			
Beaches, river and lake shores			

Q45. What is your view of vaping (e-cigarettes)?

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Q46. Is there anything else you would like to add regarding your health and access to key health services?

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SECTION 5: ARTS AND CULTURE

Q47. Do you identify with a particular culture i.e. customs, practices, languages, values or world views? (Select one only)

- Yes, my culture is ....
- No
- Other, please specify ....

Q48. Below are some statements relating to your culture. Using a 1-5 scale where 1 is strongly disagree and 5 is strongly agree, please indicate how much you agree with the following statements. (Select one per row) (Only answer if you answered yes in question 47)

	Strongly disagree	Disagree	Neutral	Agree	Strongly Agree	Don't know
I can participate, perform or attend activities or groups that align with my culture						
I can use language to express my culture e.g. Te Reo Māori, Spanish etc						
I can express my culture without feeling excluded from my neighbourhood, community or town						

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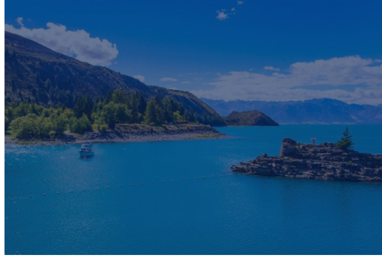

SECTION 5: ARTS AND CULTURE

Q49. Have you participated in, performed at or attended an arts or cultural event or place in the district in the last 12 months? (Select one only)

- Yes
- No

Q50. How satisfied are you with the arts, culture and heritage offering available in the district? (Select one only)

- Very dissatisfied
- Dissatisfied
- Neutral
- Satisfied
- Very satisfied
- Don't know

Q51. How satisfied are you with the celebration of tangata whenua and Māori culture in the district? (Select one only)

- Very dissatisfied
- Dissatisfied
- Neutral
- Satisfied
- Very satisfied
- Don't know

Q52. Is there anything else you would like to add regarding culture?

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SECTION 6: ENVIRONMENT

Q53. Have you made any lifestyle changes in the last 12 months to improve your households' impact on the environment? (Select one only)

- Yes
- No
- Not sure

Q54. What changes have you made? (Only answer if you answered yes in question 53)

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Q55. How concerned are you with the impact of climate change on the district? (Select one only)

- Not at all concerned
- Not concerned
- Neutral
- Concerned
- Very concerned
- Don't know

Q56. Overall, how satisfied are you with using the steps Queenstown Lakes District Council is taking to protect the environment? (Select one only)

- Very dissatisfied
- Dissatisfied
- Neutral
- Satisfied
- Very satisfied
- Don't know

Q57. In July this year, Queenstown Lakes District Council introduced a new three bin system for waste, mixed recycling and glass recycling. Has the new three bin waste and recycling system improved how you manage your household waste? (Select one only)

- Yes
- No
- Somewhat
- Not applicable
- Other, please specify ....

Q58. Is there anything else you would like to add regarding the environment?

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SECTION 7: TRANSPORT

Q59. Thinking about the public transport available in the district, how strongly do you agree or disagree with the following statements? (Select one per row)

	Strongly disagree	Disagree	Neutral	Agree	Strongly Agree	Don't know
Public transport is affordable						
Public transport is frequent (a regular service)						
Public transport is reliable (it arrives/departs on time)						
Public transport is safe						
Public transport is accessible (easy to get to from my house)						
Public transport is accessible for my needs						
Overall, the public transport available in the district meets the needs of residents						

Q60. How regularly do you use alternative modes of transport to a car (bus, walk or bike) to travel to and from work? (Select one per row)

	Daily	Weekly	Monthly	Infrequently	Never
Bus					
Walk					
Bike					
E-bike or scooter					
Water Taxi					

Q61. How regularly do you use alternative modes of transport to a car (bus, walk or bike) in your spare time e.g. other than work? (Select one per row)

	Daily	Weekly	Monthly	Infrequently	Never
Bus					
Walk					
Bike					
E-bike or scooter					
Water Taxi					

Q62. Thinking about the way you travel to work, which of the following affect which mode of transport you decide to use? (Select all that apply)

- Time
- School and pre-school drop off time
- Cost
- Journey length
- Cost of parking
- Quality of footpaths
- Tracks and trails
- Safety
- Climate change
- The weather
- Other, please specify ....
- Not applicable

Q63. Thinking about transport and safety, have you been involved in, or witnessed any of the following in the last 12 months? (Select all that apply)

- A car accident
- A near miss involving a car
- Dangerous driving
- Accident involving e-bikes, scooters, cyclists or walkers
- None of these

Q64. Which town centre do you visit most regularly (Select one only)

- Wanaka
- Queenstown
- Frankton
- None of these

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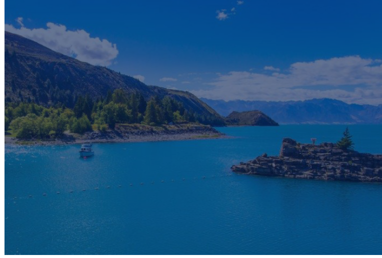

SECTION 7: TRANSPORT

Q65. Thinking about the town you visit most, how much do you agree or disagree with each of the following statements? (Select one per row) (Only answer if you indicated Wanaka, Queenstown, or Frankton in question 64)

	Strongly disagree	Disagree	Neutral	Agree	Strongly Agree	Don't know
The town layout works well for both pedestrians and cars						
The town is an easy place to spend time						
The parking arrangements are suitable for the amount of traffic in the town						
There is enough public transport available in the town						
Generally, traffic levels are acceptable in town						
The town meets the needs of both residents and tourists						
The town is safe at night						
Alcohol and drug related anti-social behaviour is under control within the town centre						

Q66. Is there anything else you would like to add regarding transport or town centres?

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SECTION 8: YOUR NEIGHBOURHOOD

Q67. Thinking about the neighbourhood which you live in, please indicate how strongly you agree or disagree with the following statements. (Select one per row)

	Strongly disagree	Disagree	Neutral	Agree	Strongly Agree	Don't know
Living in this neighbourhood gives me a sense of community or belonging						
There is a strong and active community in this neighbourhood						
I regularly stop and talk to people in my neighbourhood						
I am willing to work with others on something to improve my neighbourhood						
I participate in activities within my neighbourhood						
There are sufficient community facilities that I can walk or cycle to (sports, café, meeting places, playgrounds)						
The neighbourhood is safe for myself, my family and others						

Q68. Do you consider yourself and your neighbourhood resilient and prepared for an emergency such as an earthquake, flood, landslide or severe weather event e.g. you have sufficient emergency supplies including water and food for seven days, have a plan with family/friends and have read the emergency response plan for your neighbourhood? (Please select one answer for each row)

	Yes	No	Not sure
Yourself			
Neighbourhood			

Q69. Is there anything else you would like to add regarding your neighbourhood?

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SECTION 9: COMMUNITY SERVICES AND FACILITIES

Q70. How often do you use the following facilities? (Select one per row)

	Daily	Weekly	Monthly	A few times a year	Never
Public toilets					
Parks, reserves and gardens					
Trails, walkways and cycleways					
Indoor sports facilities					
Sports grounds					
Playgrounds					
Swimming pools					
Gym(s)					
Community halls					
Libraries					
Museum(s)					

Q71. Please indicate how satisfied you are with the QUALITY of the following services (Select one per row)

	Very dissatisfied	Dissatisfied	Neutral	Satisfied	Very satisfied	Don't know
Public toilets						
Parks, reserves and gardens						
Trails, walkways and cycleways						
Indoor sports facilities						
Sports grounds						
Playgrounds						
Swimming pools						
Gym(s)						
Community halls						
Libraries						
Museum(s)						

Q72. Please indicate how satisfied you are with the QUANTITY of the following facilities (Select one per row)

	Very dissatisfied	Dissatisfied	Neutral	Satisfied	Very satisfied	Don't know
Public toilets						
Parks, reserves and gardens						
Trails, walkways and cycleways						
Indoor sports facilities						
Sports grounds						
Playgrounds						
Swimming pools						
Gym(s)						
Community halls						
Libraries						
Museum(s)						

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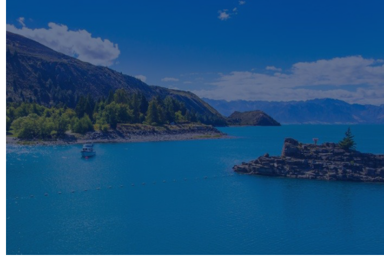

SECTION 9: COMMUNITY SERVICES AND FACILITIES

Q73. Thinking about your social networks and connections to the wider community, do you belong to any of the following groups? (Please select all that apply)

Culture/Heritage	○
Religion/ Faith/ Spiritual	○
Childcare/ Playgroup/ Activities for children	○
Environmental/ Conservation	○
Civil Defence/ Emergency Management	○
Local Community Association	○
Business network group	○
Community Support/ Advice/ Advocacy	○
Sport/ Recreation	○
Health/ Wellbeing	○
Education/ Training	○
Arts/ Music/ Theatre	○
Other creative e.g. woodwork, cookery, pottery, sewing, etc.	○
Literature/ Books	○
Online communities/ gaming	○
Other group, please specify	○
I don't attend specific groups, but I like to socialise with friends	○
None of the above	○

Q74. Each year Queenstown Lakes District Council provides $2.8 million to community groups as grants or in kind. Do you think this amount is: (Select one only)

Far too little	○
Too little	○
A sufficient amount	○
Too much	○
Far too much	○
Don't know	○

Q75. Thinking about the Queenstown Lakes District Council, how satisfied are you with the following? (Select one per row)

	Very dissatisfied	Dissatisfied	Neutral	Satisfied	Very satisfied	Don't know
Information you receive	○	○	○	○	○	○
Opportunities to have your say	○	○	○	○	○	○
Elected members	○	○	○	○	○	○
Overall Council performance	○	○	○	○	○	○

Q76. Is there anything else you would like to add regarding community services and facilities?

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SECTION 9: COMMUNITY SERVICES AND FACILITIES

Q77. How much do you agree or disagree with the following statement: "*I feel a sense of pride in the district*"? (Select one only)

Strongly disagree	○
Disagree	○
Neutral	○
Agree	○
Strongly agree	○
Don't know	○

Q78. What/ where is your favourite place to spend time in the district?

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Q79. What factor make this your favourite place? (Select all that apply)

Types of people there	○
Location	○
Cost	○
Physical feature or the environment	○
Products or services offered	○
Feeling part of a community	○
Opportunities to learn	○
Other please specify	○

Q80. The Queenstown Lakes District has experienced growth in recent years. How much do you agree or disagree with the following statements? (Select one per row)

	Strongly disagree	Disagree	Neutral	Agree	Strongly Agree	Don't know
"I am comfortable with the growth of resident numbers in the district."	○	○	○	○	○	○
"I am comfortable with the growth of visitor numbers in the district."	○	○	○	○	○	○

Q81. In the 2018 Quality of Life Survey, a number of significant issues regarding safety were highlighted, do you think the following are being adequately addressed in the district? (Select one per row)

	Yes	No	Don't know
Dangerous driving	○	○	○
Alcohol and drug related anti-social behaviour	○	○	○
Litter and dumping rubbish	○	○	○

Q82. Please include any other safety issues that you think need addressing in the district.

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Q83. Do you think there has been a decrease of issues relating to freedom camping in the last 12 months? (Select one only)

Yes	○
No	○
Somewhat	○
Don't know	○

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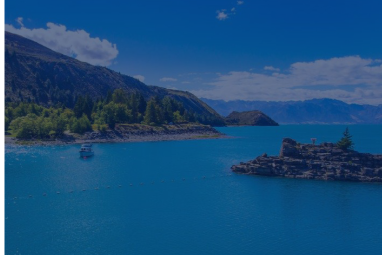

SECTION 9: COMMUNITY SERVICES AND FACILITIES

Q84. Below are some statements relating to the tourism industry and visitors/ tourists. Please indicate how much you agree or disagree with each of the following statements. (Select one per row)

	Strongly disagree	Disagree	Neutral	Agree	Strongly Agree	Don't know
The tourism industry provides good jobs for local residents	○	○	○	○	○	○
When I talk to my friends I am positive about visitors	○	○	○	○	○	○
Communities are welcoming of visitors	○	○	○	○	○	○
The impact of visitors on the environment is effectively managed e.g. protecting waterways	○	○	○	○	○	○
Visitors help support a quality and choice of shops and services	○	○	○	○	○	○
Tourist numbers increase traffic congestion at peak times (8am and 5pm)	○	○	○	○	○	○
The community benefits from tourism e.g. money goes back into communities	○	○	○	○	○	○
Interaction with visitors helps me understand and appreciate different cultures	○	○	○	○	○	○
I regularly interact with visitors	○	○	○	○	○	○

Q85. What three things do you wish tourists knew before they arrived in the district? This could be related to the environment, culture, safety or anything else you feel important.

1. ....

2. ....

3. ....

Q86. Is there anything else you would like to add regarding the district?

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SECTION 10: QUALITY OF LIFE

Q87. Thinking about all the factors we have asked about, how would you currently rate your overall quality of life in the district? (Select one only)

Extremely poor	○
Poor	○
Average	○
Good	○
Extremely good	○
Don't know	○

Q88. Is there anything else you would like to add regarding your quality of life in the district?

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This is the end of the survey. Thank you for your time, your responses are extremely valuable to the Queenstown Lakes District Council. If you would like to go in the draw to win one of 4x $250 prezzy cards and 2x family passes to the Christmas show, please enter your name and contact number in the spaces below.

Name .... **Contact number** ....

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