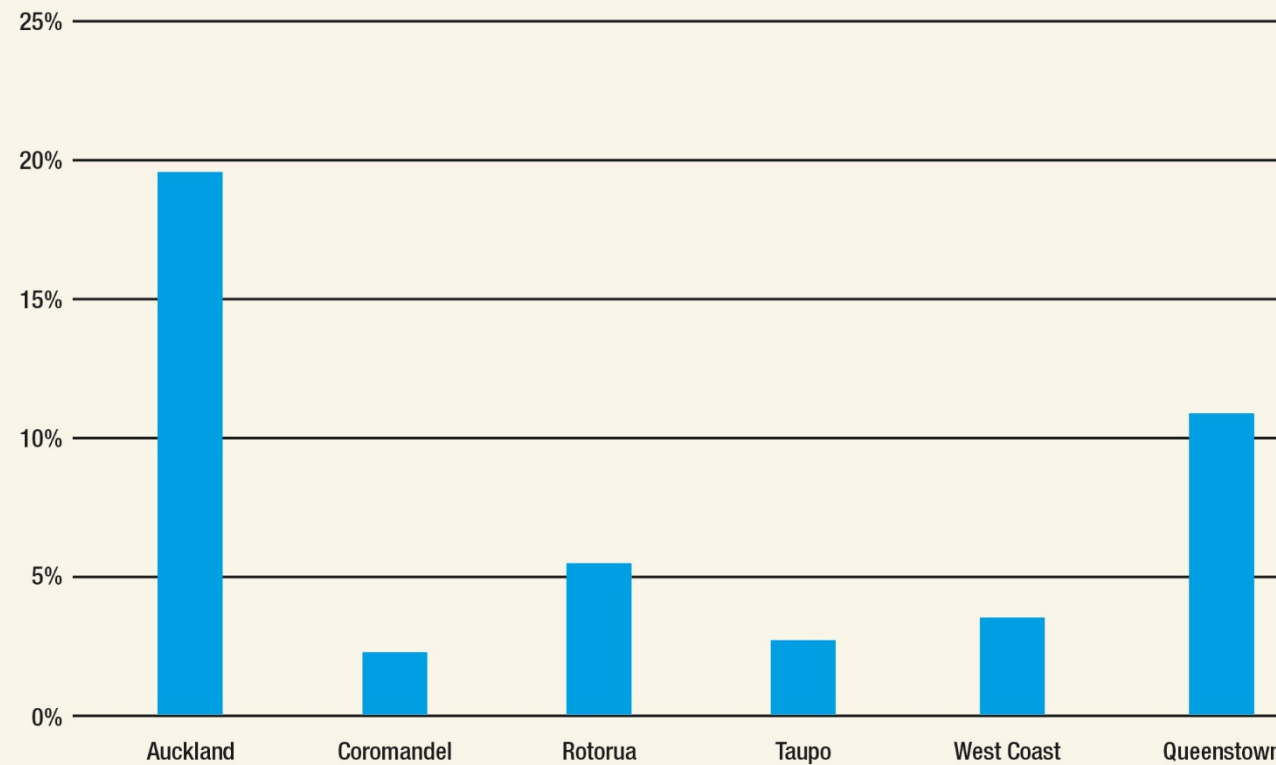


INFRASTRUCTURE AND VISITOR EXPERIENCE

Per cent of total New Zealand guest nights⁷ – major tourist destinations

Year ended December 2015

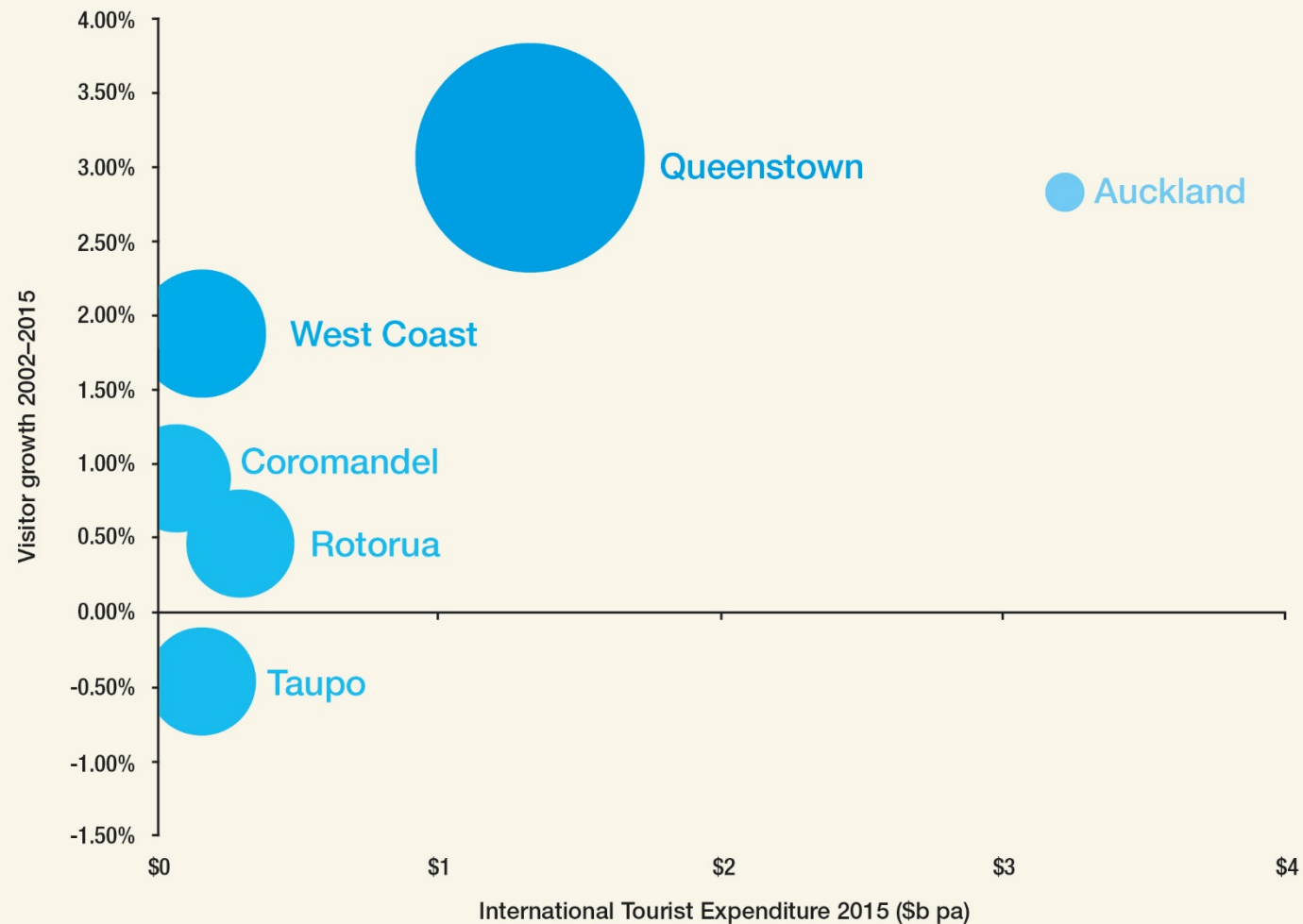


Source: Sapere research group / Statistics New Zealand Accommodation Survey

⁷ Unless specified otherwise, 'Queenstown' in these figures and charts is the sum of Queenstown and Wanaka

The scale of visitor loading on Queenstown compared to other tourist destination

Size of bubble: Visitor:Resident Ratio



Special Economic Zone

- Purpose to create test cases on small scale to ascertain success/failure
- Queenstown – unique situation
- Apply after use of “tools” available

Visitor Experience/Infrastructure

- \$18.6 billion business
- Lives and dies on reputation
- Failure to invest creates lack of product/tired product.