
Domestic Market

2017 Update

Domestic Market Highlights

Visitor numbers

- 30% of all visitors, our most important market
- 1.5 million domestic visitors in Jan-Aug 2017 (Qrious)

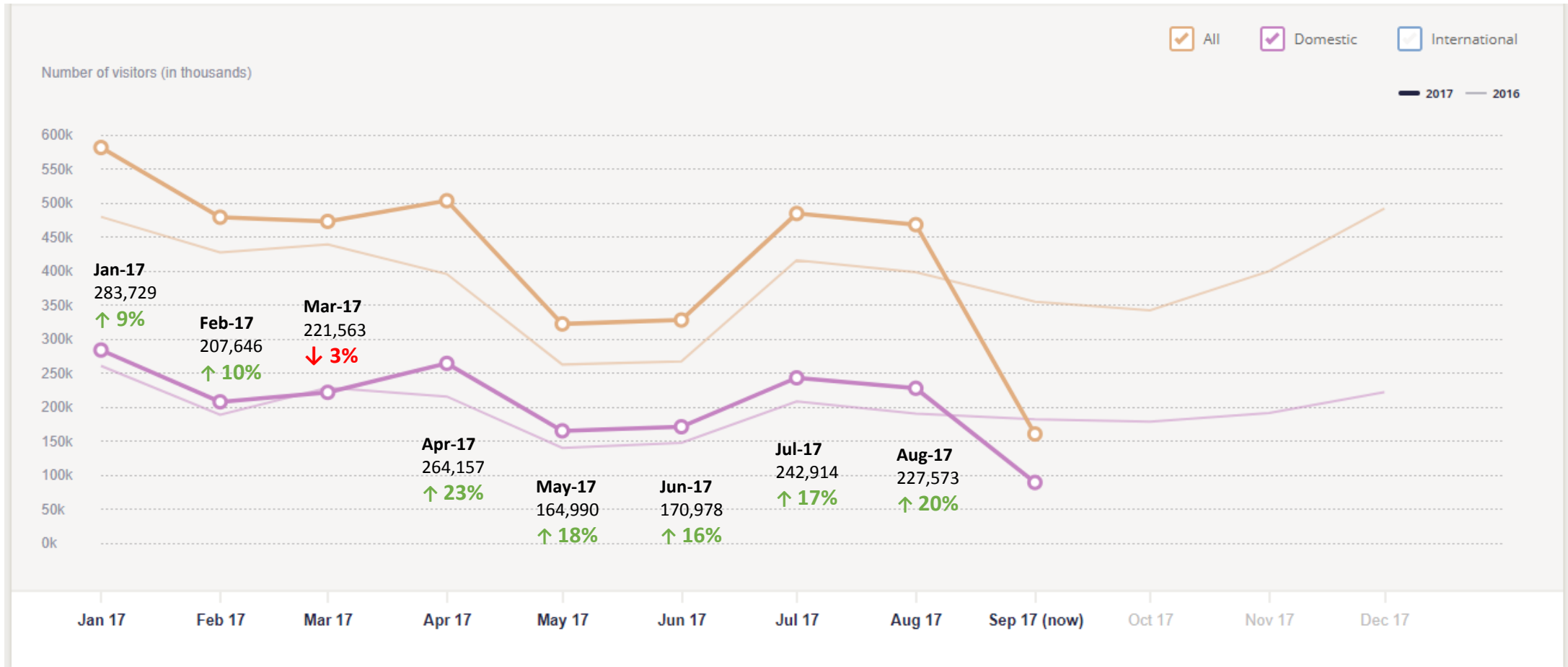
Expenditure

- \$699 million in expenditure in YE July 2017, up 3.3%
 - 32% of total expenditure

Commercial accommodation

- Commercial domestic guest nights fell 1.5 percent YE June 17 (CAM)
 - Total guest nights rose 4% in YE June 2017
 - International guest nights rose 6.5%

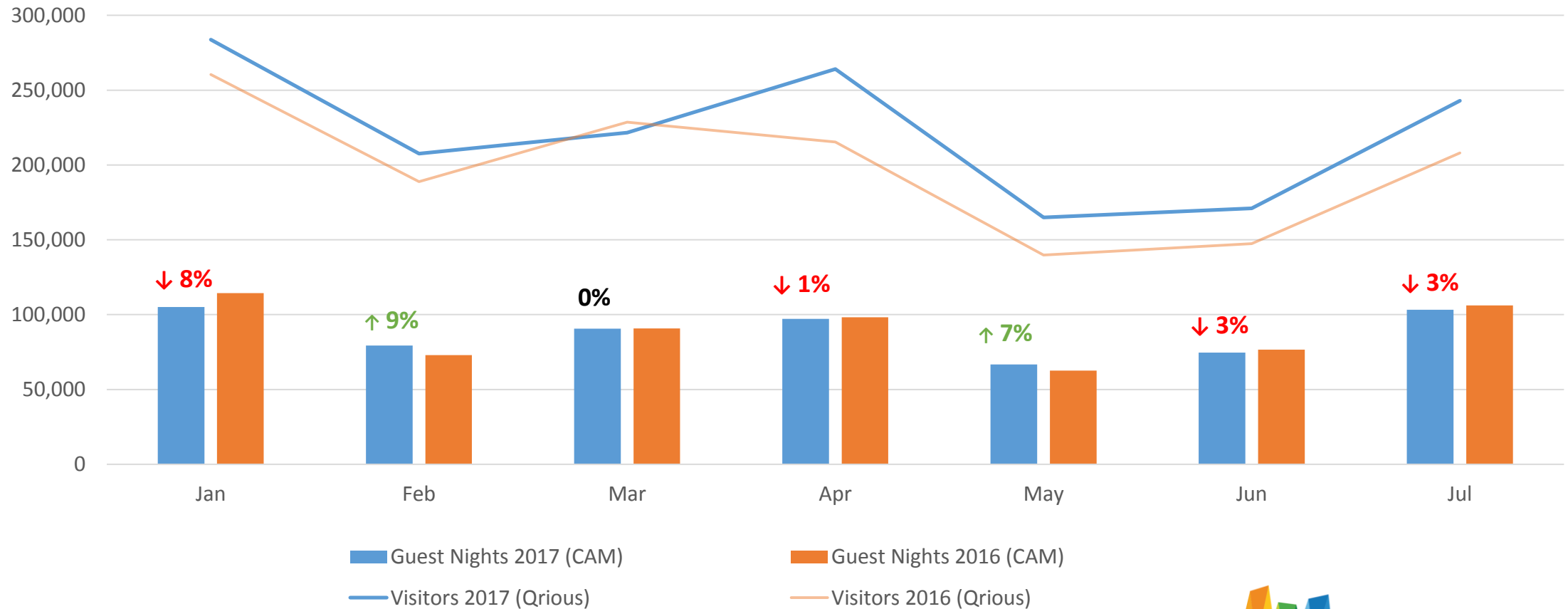
Visitation - Year to Date 2017



- Domestic visitation YTD 2017 **↑ 13%**

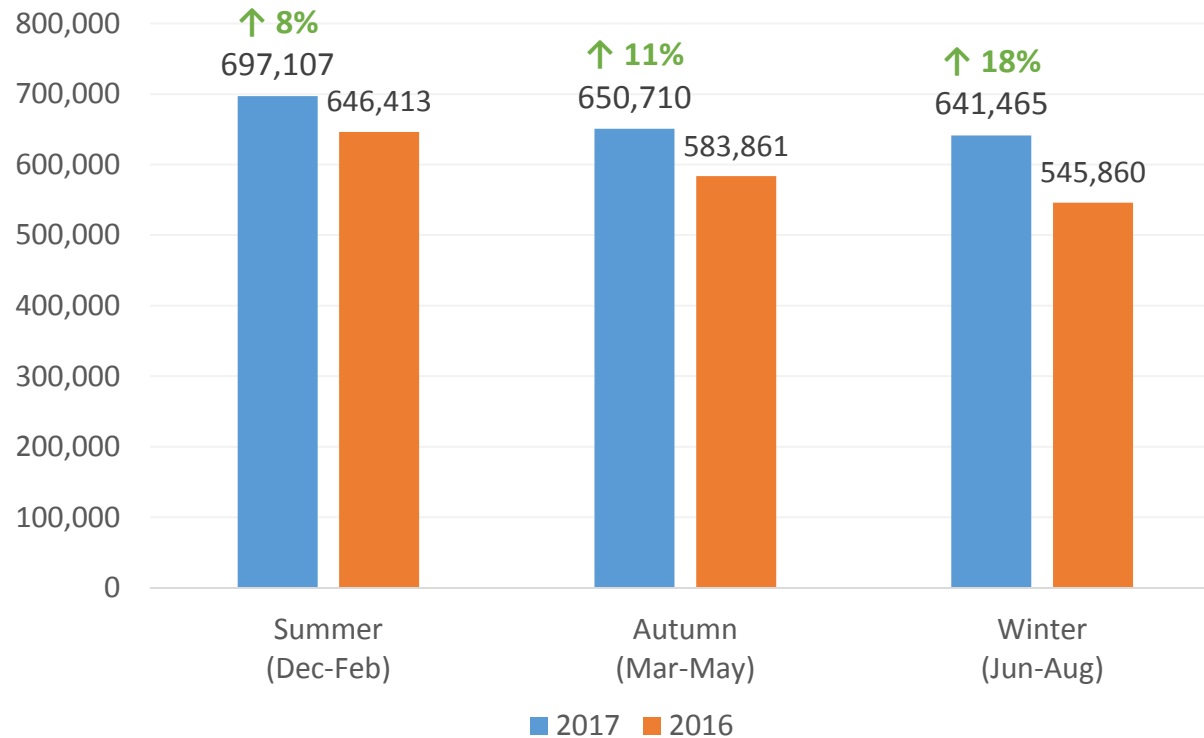
Guest Nights vs Visitors

Domestic Visitors - CAM vs Qrious

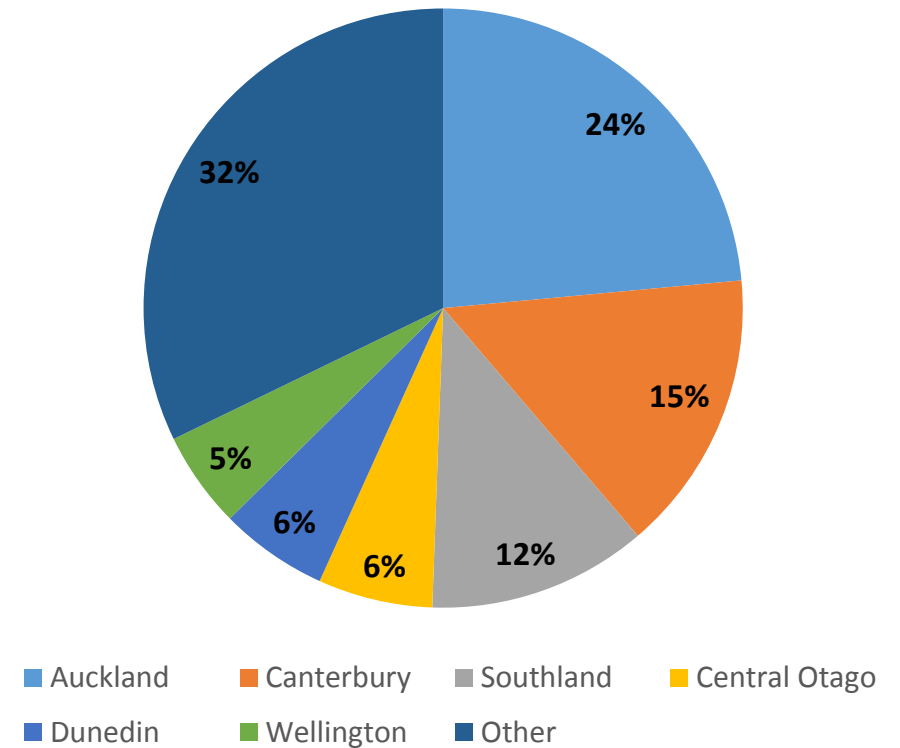


Visitor insights

Visitation by season

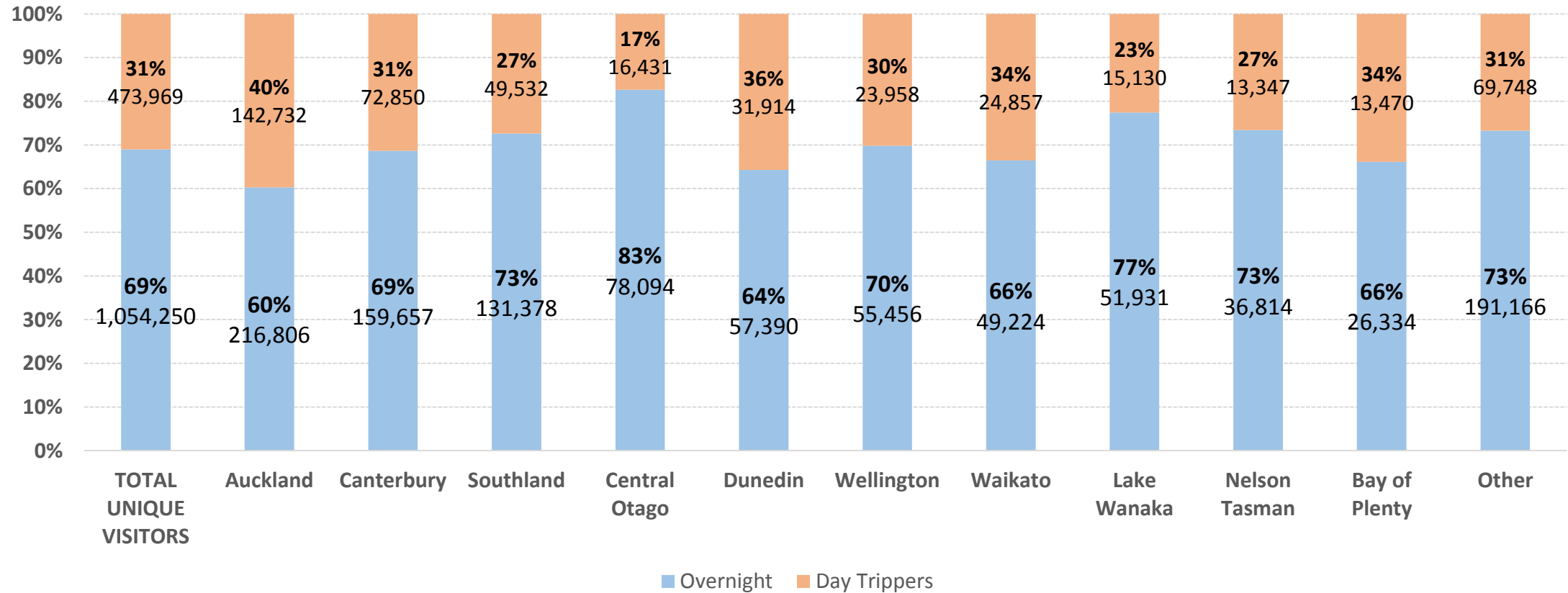


Visitors by region YTD



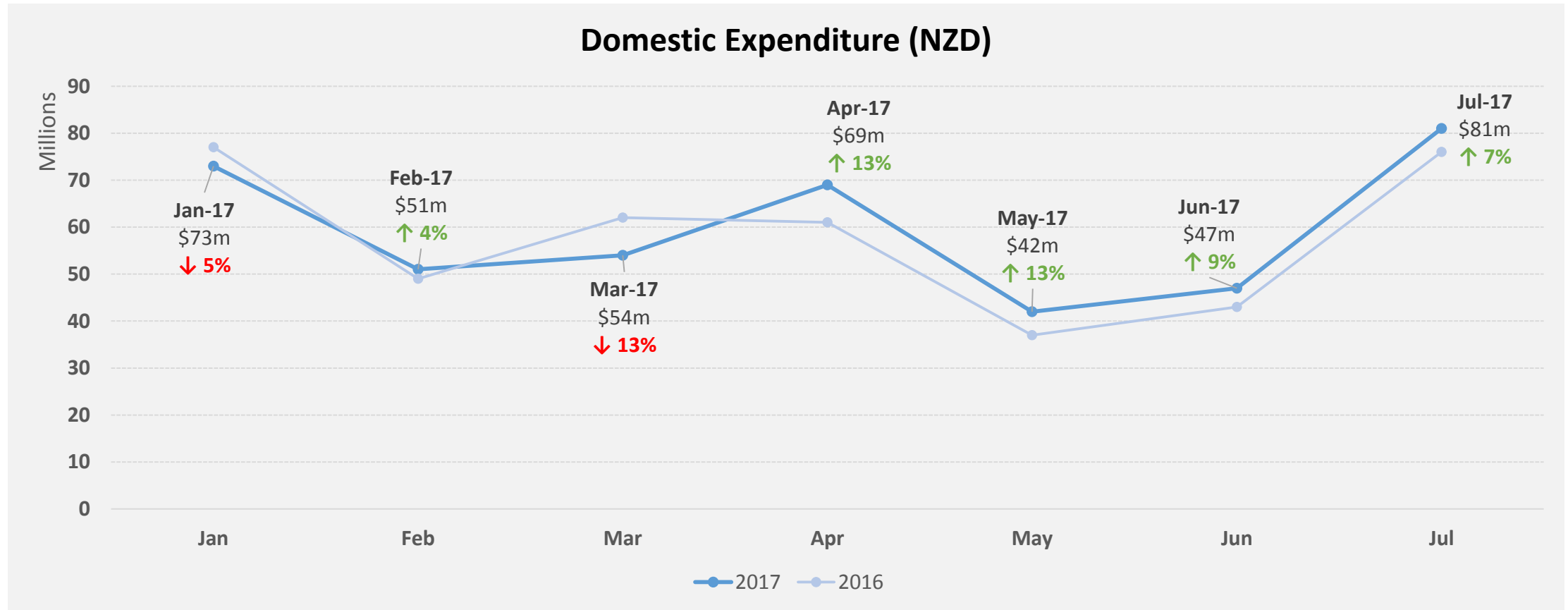
Overnight vs Day Trip Visitors

Overnight vs Day Trippers



Source: Qrious

Expenditure - Year to Date 2017



- Domestic expenditure YTD 2017 ↑ 3%

Source: MRTes

Visitor Satisfaction

SATISFACTION

On a scale of 1 (not at all satisfied) to 10 (extremely satisfied), how satisfied are you with these aspects of your current experience in the Queenstown region?

New Zealand	Q1 2015	Q1 2016	Q1 2017
Accommodation	8.3	8.2	7.9
Transport to Queenstown	8.4	8.4	7.9
Local transport options and services	7.7	7.8	7.4
Traffic and car parking	6.5*	6.1*	5.4
Public facilities (parks, toilets)			7.9
Natural environment	-	-	9.2
Cleanliness/presentation of town/region	8.6	8.6	8.6
Activities and attractions	8.9	8.6	8.7
Restaurants, cafes and bars in Queenstown	8.4	8.7	8.4
Overall experience in the Queenstown region	8.8	8.8	8.7

Summary

- Domestic market is of vital importance
- Still our largest market in terms of visitation and expenditure
- Possibly changing trends in accommodation preference
- Still key to keep marketing focus on domestic market
- Continue to monitor mix of overnight and day visitors