



QUEENSTOWN LAKES DISTRICT COUNCIL
Proposed Convention Centre
Economic and Commercial Impact Assessment

McDermott Miller Report

24 July 2013

TABLE OF CONTENTS

| | | |
|------------------|--|----------|
| 1. | SUMMARY FINDINGS | 1 |
| ANNEXURES | | |
| ANNEX I | Brief | 5 |
| ANNEX II | Tables per evaluation criteria references | 8 |

LIST OF EXHIBITS

| | | |
|--------------|---|----|
| Table 1 | QLDC Convention Centre Appraisal: Evaluation Balance Sheet | 3 |
| Table AII.1 | Estimated Conference Persons and Person Days..... | 11 |
| Table AII.2 | Economic Impacts of Convention Centre Operation, 2020..... | 12 |
| Table AII.3 | Indirect Employment Generated , 2020..... | 12 |
| Table AII.4 | Construction Effects..... | 13 |
| Table AII.5: | Economic Criteria1.8: Estimated Net Present Value of Sites..... | 13 |
| Table AII.6: | Accessibility Criterion 3.1: Proximity of QLDC Convention Centre options to major Queenstown hotels..... | 14 |
| Table AII.7: | Accessibility Criterion 3.2: Proximity of QLDC Convention Centre options to Queenstown CBD centre (cnr Camp St and The Mall)..... | 15 |

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1. SUMMARY FINDINGS

McDermott Miller's summary findings of its impact assessment of the proposed Queenstown Convention Centre are presented in the form of a planning balance sheet, colour coded similarly to the Populous balance sheet so the two can be read together at a glance (**see page 3**). On balance, development and operation of a Convention Centre on the Lakeview site option offers significantly more potential economic and commercial benefits than development on other site options considered in Queenstown Centre.

As in the Horwath feasibility report (2012), our base case assumption is that performance of the Convention Centre will be the same on all three sites. This employs Horwath assumptions of utilisation as set out in Section 7 of that report.

However, McDermott Miller have also defined a high value product and marketing scenario which we believe could only be achievable on the Lakeview site, as it has unique potential to be developed as a Convention Centre with strong appeal to a high-spending international market.

Compared to the "base case" assumption, this aspirational scenario involves doubling the number of large conferences offered from 10 (refer Table 7.1 of Horwath report) to 20 per year, accompanied by a shift from international delegates accounting for 25% of total visitor spending generated by the Convention Centre to internationals generating 75%.

This target also presupposes, inter alia:

- a public/private sector convention centre marketing strategy that contributes to broader destination strategy of matching differentiated tourism products to high-spending international visitor segments
- development of complementary products such as expanded and upgraded casino or, national fashion and art show place, or theatre(not yet included in the analysis)
- expanded/upgraded hotel accommodation supply on-site or nearby (not yet included in the analysis)
- improvement in airport capacity (if needed) etc to handle 1000+ flows of delegates and accompanying persons

- Queenstown Town Centre zoning boundary expanded to envelop, not isolate, the Lakeview site with improved pedestrian access to and from the Convention Centre to the Town Centre retail and leisure offering.

The most significant finding of our economic assessment is the high NPV of the "enhanced" (international visitor oriented) convention centre on the Lakeview site. The difference between this Lakeview option and other options at Gorge Road and Stanley Street is in the order of \$182 million NPV at 6% discount rate over 25 years. This should impress the putative Government investment partner.

Results of McDermott Miller's assessment, together with underlying tables, are presented in the attached **Annexes**.

Table 1 QLDC Convention Centre Appraisal: Evaluation Balance Sheet

| EVALUATION CRITERIA | | EVALUATION RESULTS | | | | | | | |
|----------------------|---|---|------------|---|------------|---|------------|---|------------|
| | | Gorge Road: 25% of spend from IV & 75% from DV, with 10 large conferences | | Stanley Street: 25% of spend from IV & 75% from DV, with 10 large conferences | | Lakeview I: 75% of spend from IV & 25% from DV, with 10 large conferences | | Lakeview II: 75% of spend from IV & 25% from DV with 20 large conferences | |
| | | Value | Score | Value | Score | Value | Score | Value | Score |
| Economic | | | | | | | | | |
| 1.1 | Once-off contribution to District GDP from Construction (\$M) | \$15.1 | 5 | \$15.2 | 5 | \$16.7 | 8 | \$16.7 | 8 |
| 1.2 | Once-off addition to annual jobs from Construction | 151 | 5 | 152 | 5 | 166 | 8 | 166 | 9 |
| 1.3 | Ongoing annual contribution to District GDP (\$M) | \$22.3 | 5 | \$22.3 | 5 | \$27.3 | 8 | \$36.5 | 9 |
| 1.4 | Ongoing indirect & induced jobs generated in the District | 237 | 5 | 237 | 5 | 303 | 6 | 383 | 8 |
| 1.5 | Ongoing ann. addition to jobs in Town Centre: Number | 100 | 5 | 100 | 5 | 125 | 7 | 161 | 9 |
| 1.6 | Share of Projected Growth in Town Centre Employment | 8.0% | 5 | 8.0% | 5 | 10.0% | 8 | 12.0% | 9 |
| 1.7 | Share of projected growth in visitor nights after 5 years | 8.5% | 5 | 8.5% | 5 | 9.7% | 8 | 12.1% | 9 |
| 1.8 | NPV of net economic benefits less costs over 25 years (\$M) | \$285.1 | 3 | \$285.1 | 3 | \$349.0 | 6 | \$466.6 | 10 |
| 1.9 | Consumer surplus in relation to Town Centre experience | | 5 | | 5 | | 5 | | 6 |
| 1.10 | Opportunity Cost (foregone alternative use) | | 1 | | 2 | | 9 | | 9 |
| 1.11 | Displacement effects on existing convention industry | | 5 | | 5 | | 8 | | 8 |
| 1.12 | "Touchstone" to refresh & reorient strategic marketing | | 3 | | 3 | | 8 | | 9 |
| 1.13 | Catalyst to further development & redevelopment of Town Centre ¹ | | 2 | | 5 | | 7 | | 9 |
| Commercial | | | | | | | | | |
| 2.1 | International standard Convention Centre experience | | 3 | | 5 | | 9 | | 9 |
| 2.2 | Opportunity Cost (return on financial investment) | | 3 | | 3 | | 3 | | 3 |
| 2.3 | Shift from seasonal workers to full time employment | | 3 | | 3 | | 5 | | 5 |
| 2.4 | Instills investor confidence in CBD redevelopment | | 3 | | 3 | | 6 | | 6 |
| 2.5 | Return on QLD Council's assets & marketing investment | | 3 | | 3 | | 7 | | 8 |
| 2.6 | Scope for adjoining commercial development | | 3 | | 3 | | 8 | | 8 |
| Accessibility | | | | | | | | | |
| 3.1 | Walkable access from top hotels to Convention Centre | | 3 | | 7 | | 8 | | 8 |
| 3.2 | Walkable access to Town Centre shops, cafes, bars etc | | 5 | | 9 | | 3 | | 3 |
| 3.3 | Access to parking at Centre location or nearby | | 7 | | 5 | | 7 | | 7 |
| 3.4 | Impact of arterial barrier along Stanley & Shotover Sts | | 5 | | 5 | | 5 | | 5 |
| 3.5 | Site integrated with, not isolated from, Town Centre ¹ | | 3 | | 9 | | 7 | | 7 |
| Average Score | | | 4.0 | | 4.7 | | 6.8 | | 7.5 |

¹ Lakeview scores assume Queenstown Town Centre zone boundary is extended to envelop and integrate the Lakeview site with Town Centre retail and leisure offer.

| Key: Impact on Queenstown compared to no convention centre | | Score: |
|---|--|--------|
| | Strong positive effect or Weak negative effect | 7-10 |
| | Medium positive effect or Medium negative effect | 4 - 6 |
| | Minor positive effect or Strong negative effect | 1 - 3 |

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Queenstown Lakes District Council

Proposed Convention Centre Economic and Commercial Impact Assessment

***McDermott Miller
24 July 2013***

Annexures

Annex I Brief

Annex II Tables per evaluation criteria references

Queenstown Lakes District Council

Proposed Convention Centre Economic and Commercial Impact Assessment

Annex I Brief

McDermott Miller's Brief

Purpose

Need for a high level economic and commercial impact assessment of the proposed Convention Centre in the Queenstown CBD, to inform the Council's forthcoming public consultation process on the proposed Centre.

Scope

Assess high level economic and commercial impacts of a Convention Centre in the Queenstown CBD, if built on optional sites, and compared with the "do nothing" option.

"High Level" in this context means expressing the results of the assessment in terms of potential changes in visitor numbers, visitor spend and job numbers in the Queenstown CBD, and value added to the District economy for each site and Convention Centre configuration.

An impact assessment will be undertaken for the following sites:

- Stanley Street,
- Gorge Road,
- Lakeview; and,
- Frankton delta/Riverside Peninsula (the Queenstown Centre versus Frankton option).

Option Specification

The assessment is to reflect:

- various development forms on those sites, including Convention Centre alone versus Convention Centre plus Casino and Retail Galleria.
- different staging for development over time for each site option and is to be set in the context of economic development scenarios 1 and 2 already developed through McDermott Miller's Queenstown Lakes District Economic Model.

Methodology

In brief:

1. Review available documentation and derive schematic options for assessment.
2. Apply McDermott Miller's Queenstown Lakes District Economic Model to assess economic, commercial and strategic marketing effects and spatial impacts of each option.
3. Assess the 'catalytic' effect of each option on future vitality and redevelopment of Queenstown Centre.
4. Bring the results together using a quadruple bottom line approach in the form of a Planning Balance Sheet showing economic, commercial, social and cultural impacts for each site and development option.

5. Report, illustrated where appropriate with schematic figures and graphics.

The methodology should both inform the public and enable the Council to weigh up the benefits of a Convention Centre on the identified sites as compared with no Convention Centre.

Liaison

In the course of the assessment, liaise as appropriate with nominated QLDC management and their other consultants and advisers working on the Convention project.

Deliverables

McDermott Miller will complete the project and deliver a report showing the results of the economic and commercial impact assessments for each of the optional sites, making comparisons with the "do nothing" option and containing recommendations about the benefits of further value assessments as the project progresses.

Timetable

Assuming all data is available by Friday 5 July 2013, we expect to deliver our report by Wednesday 17 July 2013.

Queenstown Lakes District Council

***Proposed Convention Centre
Economic and Commercial Impact Assessment***

**Annex II
Tables per evaluation criteria
references**

AII.1

ASSUMPTIONS/SCENARIOS

The starting point from the evaluation of economic effects is the usage data in the report *Proposed Queenstown Conference Centre Feasibility Study Prepared for Queenstown Lakes District Council*, Horwath HTL (July 2012). This report is referred to as the Horwath report.

The Convention Centre utilisation assumptions of the Horwath analysis are set out in Section 7 of that report.

In particular we have drawn on:

- **Table 7.1** Number of events: Years 1–5
- **Table 7.2** Number of event days (excluding pack-in / pack-out days): Years 1–5
- **Table 7.3** Number of attendee days: Years 1–5
- The assumption (p 60) that 30% of conference attendees have an accompanying person
- **Table 8.1** Average daily spend assumptions for multi-day conference attendees: Years 1–5 (excl GST); Delegates – during conference; Accompanying persons – during conference; and, Pre / Post conference (per person)
- International visitors are projected to contribute 25% of the total visitor expenditure (**Section 8.1**).

The Horwath report (**Section 8.1**) assumes that activity at the Convention Centre is “new” to Queenstown, ie there are negligible displacement effects. In our view, with the Stanley Street and Gorge Road site options there is likely to be some displacement. The current hotel-based convention offer is pitched primarily at the same domestic market that Horwath assumes will generate 75% demand (by value) of the new Convention Centre. In contrast, we assume Lakeview Convention Centre has potential to attract a much greater share of its business from international markets. This would minimise the displacement effect on the existing domestic business visitor oriented convention centre industry in Queenstown. This is reflected in our Evaluation Balance Sheet results (**refer Table 1** report proper).

AII.2

SITE OPTIONS

The site options we have evaluated are:

- Gorge Road: 25% of spend from IV & 75% from DV, with 10 large conferences¹
- Stanley Street: 25% of spend from IV & 75% from DV, with 10 large conferences

¹ Refer Table 7.1 of Horwath Report: At Year 5, there would be 10 large conferences, 17 Medium and 27 Small

- Lakeview I: 75% of spend from IV & 25% from DV, with 10 large conferences
- Lakeview II: 75% of spend from IV & 25% from DV with 20 large conferences

The Gorge Road and Stanley Street site options employ Horwath assumptions on utilisation.

For the Lakeview site, we have defined two high value product and marketing scenarios which we believe could only be achievable on the Lakeview site, as it has unique potential to be developed as a Convention Centre with strong appeal to a high-spending international market.

The first of these (Lakeview I) involves a shift from international delegates accounting for 25% of total visitor spending generated by the Convention Centre to internationals generating 75%.

The second, (Lakeview II) also makes this assumption and involves doubling the number of large conferences offered from 10 (refer Table 7.1 of Horwath report) to 20 per year.²

These Lakeview site options also presuppose, inter alia:

- a public/private sector convention centre marketing strategy that contributes to broader destination strategy of matching differentiated tourism products to high-spending international visitor segments;
- development of complementary products such as expanded and upgraded casino or, national fashion and art show place, or theatre (not yet included in the analysis);
- expanded/upgraded hotel accommodation supply on-site or nearby (not yet included in the analysis);
- improvement in airport capacity (if needed) to handle 1000+ flows of delegates and accompanying persons; and,
- Queenstown Town Centre zoning boundary expanded to envelop, not isolate, the Lakeview site with improved pedestrian access to and from the Convention Centre to the Town Centre retail and leisure offering.

² However, the number of small conferences is reduced by 50% to allow for capacity issues that may arise

AII.3

RESULTS

The following tables elaborate the summary results shown in the Evaluation Balance Sheet.

Table AII.1 Estimated Conference Persons and Person Days

| | | Site Option | | |
|-----------------------------|--|---|--|--|
| | | Stanley Street & Gorge Road: 25% of spend from IV & 75% from DV, with 10 large conferences | Lakeview I: 75% of spend from IV & 25% from DV, with 10 large conferences | Lakeview II: 75% of spend from IV & 25% from DV with 20 large conferences |
| Conference Delegates | | | | |
| Persons | | | | |
| International | Conference Delegates | 3,406 | 13,115 | 15,528 |
| | Accompanying Persons | 1,022 | 3,934 | 6,211 |
| | <i>Subtotal</i> | <i>4,428</i> | <i>17,049</i> | <i>21,739</i> |
| | | | | |
| Domestic | Conference Delegates | 13,217 | 3,800 | 5,571 |
| | Accompanying Persons | 4,088 | 1,175 | 2,297 |
| | <i>Subtotal</i> | <i>17,304</i> | <i>4,975</i> | <i>7,868</i> |
| | | | | |
| Total | Conference Delegates | 16,623 | 16,914 | 21,099 |
| | Accompanying Persons | 5,110 | 5,110 | 8,508 |
| | Total | 21,733 | 22,024 | 29,607 |
| | | | | |
| Person Days | | | | |
| International | Delegate days during Conference | 10,598 | 40,801 | 51,657 |
| | Accompanying Person days during Conference | 3,179 | 12,240 | 20,663 |
| | Delegate+Accompanying person days before/after | 3,985 | 15,344 | 19,565 |
| | <i>Subtotal</i> | <i>17,762</i> | <i>68,385</i> | <i>91,885</i> |
| | | | | |
| Domestic | Delegate days during Conference | 41,119 | 11,822 | 18,533 |
| | Accompanying Person days during Conference | 12,717 | 3,656 | 7,642 |
| | Delegate+Accompanying person days before/after | 15,942 | 4,583 | 7,236 |
| | <i>Subtotal</i> | <i>69,778</i> | <i>20,061</i> | <i>33,412</i> |
| | | | | |
| Total | Delegate days during Conference | 51,716 | 52,622 | 70,190 |
| | Accompanying Person days during Conference | 15,896 | 15,896 | 28,305 |
| | Delegate+Accompanying person days before/after | 19,927 | 19,927 | 26,801 |
| | Total | 87,540 | 88,446 | 125,297 |
| | | | | |

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Table AII.2 Economic Impacts of Convention Centre Operation, 2020

| | Site Option | | |
|---------------------------------|---|--|--|
| | Stanley Street & Gorge Road: 25% of spend from IV & 75% from DV, with 10 large conferences | Lakeview I: 75% of spend from IV & 25% from DV, with 10 large conferences | Lakeview II: 75% of spend from IV & 25% from DV with 20 large conferences |
| Direct Output (\$M) | 28.4 | 35.0 | 46.3 |
| Indirect Output (\$M) | 10.6 | 12.7 | 17.6 |
| Direct+Indirect Output (\$M) | 39.0 | 47.6 | 63.9 |
| Induced Output (\$M) | 5.4 | 6.7 | 8.8 |
| Total Output (\$M) | 44.4 | 54.3 | 72.7 |
| Total Value Added (\$M) | 22.3 | 27.3 | 36.5 |
| Net Household Income (\$M) | 9.8 | 11.9 | 15.9 |
| Indirect and Induced Employment | 237 | 303 | 383 |

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Table AII.3 Indirect Employment Generated , 2020

| Activity | Site Option | | |
|--|---|--|--|
| | Stanley Street & Gorge Road: 25% of spend from IV & 75% from DV, with 10 large conferences | Lakeview I: 75% of spend from IV & 25% from DV, with 10 large conferences | Lakeview II: 75% of spend from IV & 25% from DV with 20 large conferences |
| Retail | 25 | 33 | 42 |
| Cafe_Food | 47 | 60 | 73 |
| Office | 27 | 33 | 46 |
| Town Centre Employment | 100 | 125 | 161 |
| Share of Projected Growth in Town Centre Employment¹ | 8% | 10% | 13% |
| Accommodation | 54 | 67 | 81 |
| Community | 32 | 45 | 56 |
| Subtotal Town Centre & Other Central Queenstown | 185 | 236 | 297 |
| Transport-related | 10 | 15 | 18 |
| Manufacturing-Construction | 5 | 6 | 9 |
| Yard-based | 13 | 16 | 21 |
| Agriculture | 3 | 3 | 4 |
| Wholesale | 1 | 2 | 2 |
| Subtotal Industrial Zone Activities | 32 | 41 | 54 |
| Total Indirect Employment | 218 | 278 | 351 |
| Induced Employment | 19 | 26 | 32 |
| Total Indirect and Induced Employment | 237 | 303 | 383 |

¹ According to Queenstown Lakes District Council Draft Town Centre Strategy Discussion Document (June 2009), employment in the Town Centre is projected to grow to 3,300 people in 2020, up some 1200 from 2009. On the Stanley St site the Convention Centre will indirectly generate at least 100, or 8%, of these jobs.

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Table AII.4 Construction Effects

| | Site | | |
|---------------------------------|-------------|-------------|-------------|
| | Gorge Rd | Stanley St | Lakeview |
| Direct Output (\$M) | 28.8 | 28.9 | 32.0 |
| Indirect Output (\$M) | 13.9 | 14.0 | 15.6 |
| Direct+Indirect Output (\$M) | 42.7 | 42.9 | 47.6 |
| Induced Output (\$M) | 4.9 | 4.9 | 5.4 |
| Total Output (\$M) | 47.6 | 47.8 | 53.0 |
| Total Value Added (\$M) | 15.1 | 15.2 | 16.7 |
| Net Household Income (\$M) | 7.5 | 7.5 | 8.2 |
| Indirect and Induced Employment | 10.7 | 10.7 | 11.7 |
| Employment (Job-Years) | 151 | 152 | 166 |

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Table AII.5: Economic Criteria1.8: Estimated Net Present Value of Sites

| CONVENTION CENTRE SITES | ESTIMATED NET ANNUAL BENEFITS \$'million | NPV \$'million |
|-------------------------------|--|-------------------|
| Gorge RD | 22.3 | 285.1 |
| Stanley St | 22.3 | 285.1 |
| Lakeview I | 27.3 | 349.0 |
| Lakeview II | 36.5 | 466.6 |

Note: Net Present Value (NPV) is estimated by discounting future annual net value added to District GDP by convention centres at each site at the rate of 6% over 25 years. This methodology follows NZTA's practice in economic evaluation of future transport projects.

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The **Table AII.6** below shows the proximity (in metres) of each convention centre site to major Queenstown hotels (3* and above) as a means of assessing the walkability of respective sites from hotels.

The bottom six rows of the table shows the cumulative numbers and percentage shares of rooms within each walking distance band (eg up to 250m from hotel) for each site.

Table AII.6: Accessibility Criterion 3.1: Proximity of QLDC Convention Centre options to major Queenstown hotels

| | | | | Distance from Conference Centre Site | | | | | | | | |
|---------------------------------------|---|-------|----------|--------------------------------------|----------|----------|----------|------------|------------|------------|------------|-----------|
| Name | Address | Stars | Rooms | 0 - 250m | 250-500m | 500-750m | 750m-1km | 1km-1.25km | 1.25-1.5km | 1.5-1.75km | 1.75-2.5km | 2.5km+ |
| Crowne Plaza Queenstown | 93 Beach St, Queenstown | 4* | 139 | | L | | | S G | | | | |
| Heartland Hotel Queenstown | 27 Stanley St Queenstown | 3* | 81 | S | | | G | | L | | | |
| Hotel St Moritz Queenstown | 10/18 Brunswick St Queenstown | 5* | 134 | L | | | | | S | G | | |
| Novotel Queenstown Lakeside | cnr Earl & Marine Pde | 4* | 273 | | S | | G | | L | | | |
| Peppers Beacon | 33 Lake Esplanade | 4* | 83 | L | | | | | S | G | | |
| Rydges Lakeland Resort | 38/54 Lake Esplanade | 4* | 244 | L | | | | | S | G | | |
| Scenic Suites Queenstown | 27 Stanley St Queenstown | 3* | 84 | S | | | G | | L | | | |
| Sofitel Queenstown Hotel & Spa | 8 Duke St | 5* | 82 | | S | | L G | | | | | |
| Spire Hotel Queenstown | 3-5 Church Lane | 5* | 10 | | S | G | | L | | | | |
| Subtotal Queenstown Centre Core | | | 1130 | | | | | | | | | |
| Aspen Queenstown | 139 Fernhill Road Queenstown | 3* | 89 | | | | | L | | | S | G |
| Copthorne Hotel & Apartments Lakeview | 88 Frankton Rd queenstown | 4* | 85 | | | | | S G | | | L | |
| Copthorne Hotel & Resort | 88 Frankton Rd queenstown | 4* | 190 | | | | | S G | | | L | |
| Heritage Queenstown | 91 Fernhill Rd Fernhill Queenstown | 4* | 211 | | | | | | L | | S | G |
| Mercure Queenstown Resort | Sainsbury Rd Fernhill | 3* | 148 | | | | L | | | | S | G |
| Millennium Hotel Queenstown | 32 Frankton Rd | 4* | 60 | | S | | | G | | | L | |
| The Rees Hotel/apartments | 377 Franklin Road | 5* | 60 | | | | | | | | S | L G |
| Subtotal Queenstown Fringe | | | 843 | | | | | | | | | |
| Coronet Peak Hotel | 161 Arthurs Point Rd, Arthurs Pt Queenstown | | 75 | | | | | | | | | All Sites |
| Distinction Hotel | 146 Arthurs Pt Rd, Arthurs Pt Queenstown | | 36 | | | | | | | | | |
| Hilton Queenstown | Peninsula Rd, Kelvin Heights Queenstown | 5* | 220 | | | | | | | | | |
| Kawarau Hotel (Hilton) | 79 Peninsula Rd queenstown | 4* | 178 | | | | | | | | | |
| Moonlight Country | Rapid 69, Morven Ferry Rd, Arrow Junction, Queenstown | | | | | | | | | | | |
| Millbrook Resort & Country Club | | | 51 | | | | | | | | | |
| Subtotal Extremity | | | 560 | | | | | | | | | |
| | | | | | | | | | | | | |
| Total 3* to 5* hotel rooms | | | 2533 | | | | | | | | | |
| | | | | | | | | | | | | |
| Lakeview (L) | | | Cum. No. | 461 | 600 | 600 | 682 | 929 | 1578 | 1578 | 1973 | 2533 |
| | | | Cum. % | 18% | 24% | 24% | 27% | 37% | 62% | 62% | 78% | 100% |
| Stanley St (S) | | | Cum. No. | 165 | 590 | 590 | 590 | 1004 | 1465 | 1465 | 1973 | 2533 |
| | | | Cum. % | 7% | 23% | 23% | 23% | 40% | 58% | 58% | 78% | 100% |
| Gorge Rd (G) | | | Cum. No. | 0 | 0 | 10 | 530 | 1004 | 1004 | 1465 | 1973 | 2533 |
| | | | Cum. % | 0% | 0 | 0.4% | 21% | 40% | 40% | 58% | 78% | 100% |

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Table AII.7 below shows the proximity (in km) to each convention centre site to Queenstown Town Centre as a means of assessing relative walkability of respective sites to the Town Centre

Table AII.7: Accessibility Criterion 3.2: Proximity of QLDC Convention Centre options to Queenstown CBD centre (cnr Camp St and The Mall)

| Name | up to 250m | 250-500m | 500-750m | 750m-1km | 1km-1.25km |
|--|------------|----------|----------|----------|------------|
| Lakeview Site Option to cnr Camp & Mall | | | | | L |
| Stanley Street Option to cnr Camp & Mall | S | | | | |
| Gorge Road Option to cnr Camp & Mall | | | G | | |

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