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19 September 2023

Matt Barnett

Email: [fyi-request-23916-1d423efb@requests.fyi.org.nz](mailto:fyi-request-23916-1d423efb@requests.fyi.org.nz)

Tēnā koe Mr Barnett

**OFFICIAL INFORMATION ACT 1982 (OIA) – REQUEST FOR INFORMATION - CHRISTCHURCH INTERNATIONAL AIRPORT LIMITED (CIAL)**

1. We write further to our email of 22 August 2023, acknowledging receipt of your OIA request (the **Request**) of 22 August 2023 to CIAL seeking the following information:

**Request - Received 22 August 2023 – Your slide re visitor spending**

*"Please provide the data, locations and employment information used in your presentation to Ignite Wanaka in July 2023 indicating Central Otago employment numbers with the definition used for "Central Otago" in the presentation and whether this data is seasonally adjusted or otherwise adjusted."*

2. CIAL will provide you with the requested information where it is able. Each OIA query CIAL receives is assessed on a case-by-case basis, given the particular facts and circumstances in play at that time. The Central Otago Airport Project (the **Project**) is a complex commercial activity whereby CIAL is investigating the feasibility of establishing an airport in Central Otago and at present, CIAL is under no legal obligation to consult in relation to the Project. In addition, CIAL is also operating in a commercially competitive environment and this must be weighed against the considerations of public interest. Before we answer your specific queries, it may be helpful to provide some additional context to this.
3. CIAL is a council-controlled trading organisation that has been specifically established to operate and manage its business as an independent commercial undertaking for the purposes of making a profit, and to follow generally accepted commercial practices and disciplines. CIAL is not a public body collecting and spending public funds. It operates as a wholly commercial, standalone entity. Due to the size and scale of those activities it is one of only three major airports in New Zealand regulated under Part 4 of the Commerce Act.
4. To assist public understanding of the context of the Project and CIAL's decisions, CIAL has committed to, and does, proactively publish information as it completes pieces of work which is likely to be in the public interest to receive on its dedicated Project website at <https://www.centralotagoairport.co.nz>. Until work is completed, it is not capable of being released. Over time this will see more information voluntarily released. In such instances the public interest test will have been considered and weighed up as part of the decision whether to release information or not. Equally,

each OIA query CIAL receives will be assessed on a case by case basis given the particular given facts and circumstances at play at that time.

5. In respect to your Request, we respond as follows:

**Request:**

- *"Please provide the data, locations and employment information used in your presentation to Ignite Wanaka in July 2023 indicating Central Otago employment numbers with the definition used for "Central Otago" in the presentation and whether this data is seasonally adjusted or otherwise adjusted."*

The presentation includes references to source data, a copy of the presentation is **attached** for you. Information for the slide was provided by Freshinfo from a variety of sources including Stats NZ; the data source is LEED (**Linked Employer-Employee Database**) and this is combined with electronic card transaction data from Marketview.

Regarding the "definition used" for Central Otago, the study area is the Central Otago District Council and Queenstown Lakes District Council boundaries. Finally, as this data is an annual figure no seasonal adjustment is required.

6. We trust we have answered your Request for information. If you require any further information or we have in some way misinterpreted your requests, please let us know.
7. You have the right to seek an investigation and review by the Ombudsman of the decisions contained in this letter. Information about how to contact the Ombudsman or make a complaint is available at [www.ombudsman.parliament.nz](http://www.ombudsman.parliament.nz) or freephone 0800 802 602.

Ngā mihi

**CIAL LEGAL TEAM**

Email: [legal@cial.co.nz](mailto:legal@cial.co.nz)

# *Welcome* **HAERE MAI**

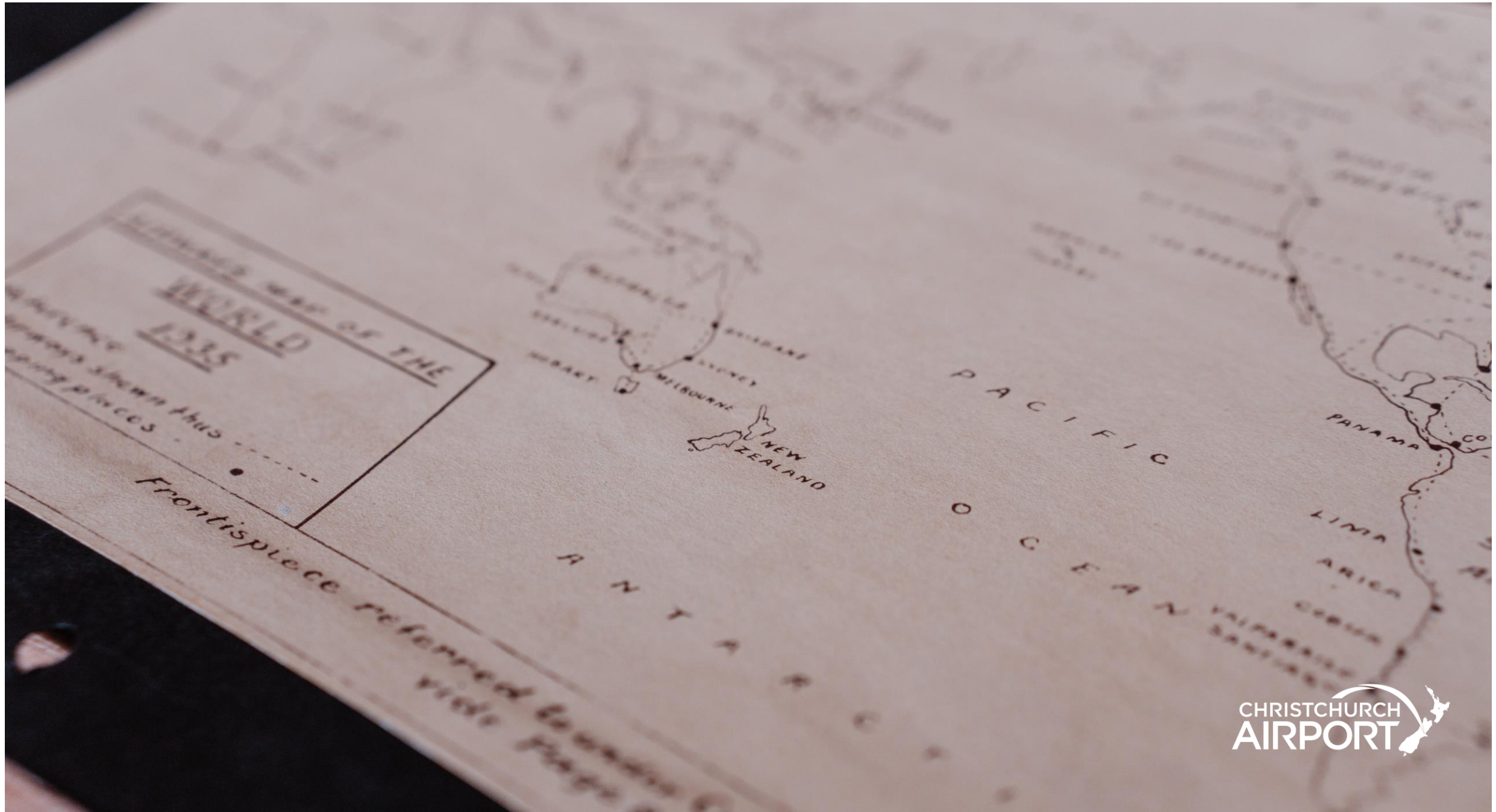
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**CHAMPIONING TE WAIPOUNAMU  
THE SOUTH ISLAND FOR TODAY  
AND TOMORROW**

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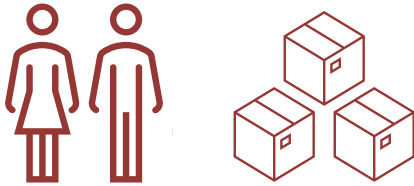
**Wanaka Business Chamber – July 2023**



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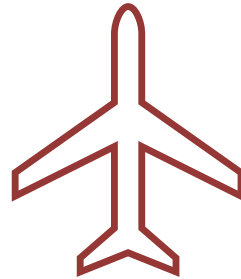
Frontispiece referred to  
vide page 1

# The fundamentals of aviation



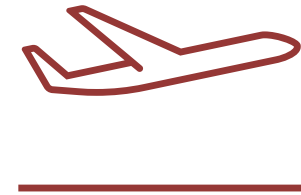
## People & freight

generate demand  
for long-distance  
travel



## Aircraft

carry people & freight  
where they want to go



## Airports

provide infrastructure for  
aircraft to land and take  
off

# Central Otago population growth

2021  
Population  
**73k**

2021-2046\* population  
growth west of centroid  
**+13,700 – 20,800**

2021-2046\* population  
growth east of centroid  
**+14,700 – 22,400**





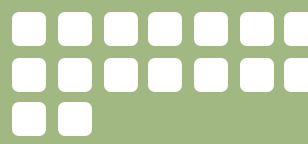



2046\*  
Population  
**102-117k**

\*Based on Stat NZ medium and high series population projections

● Central Otago population-weighted regional  
centroid 2021

# Central Otago is a region of travellers

	New residents	Domestic travel	International travel
Central Otago	 <p><b>40%</b> of Central Otago's residents moved to the region in the last five years <b>(twice the NZ average)</b></p>	 <p>Central Otago residents spend an average of <b>24 nights</b> outside the region each year <b>(~45% more than NZ average)</b></p>	 <p>Central Otago residents take an average of <b>3.75</b> international trips every five years <b>(~20% more than NZ average)</b></p>
New Zealand	 <p><b>50%</b> of New Zealand's residents moved to the region in the last five years <b>(twice the NZ average)</b></p>	 <p>New Zealand residents spend an average of <b>18 nights</b> outside the region each year <b>(~25% more than NZ average)</b></p>	 <p>New Zealand residents take an average of <b>3</b> international trips every five years <b>(~10% more than NZ average)</b></p>

The vitality of Central Otago's current and future economy depends on the efficient movement of people and products



High value exports



Screen production



Visitation



Construction



Logistics



Wine



Hospitality & events



Education

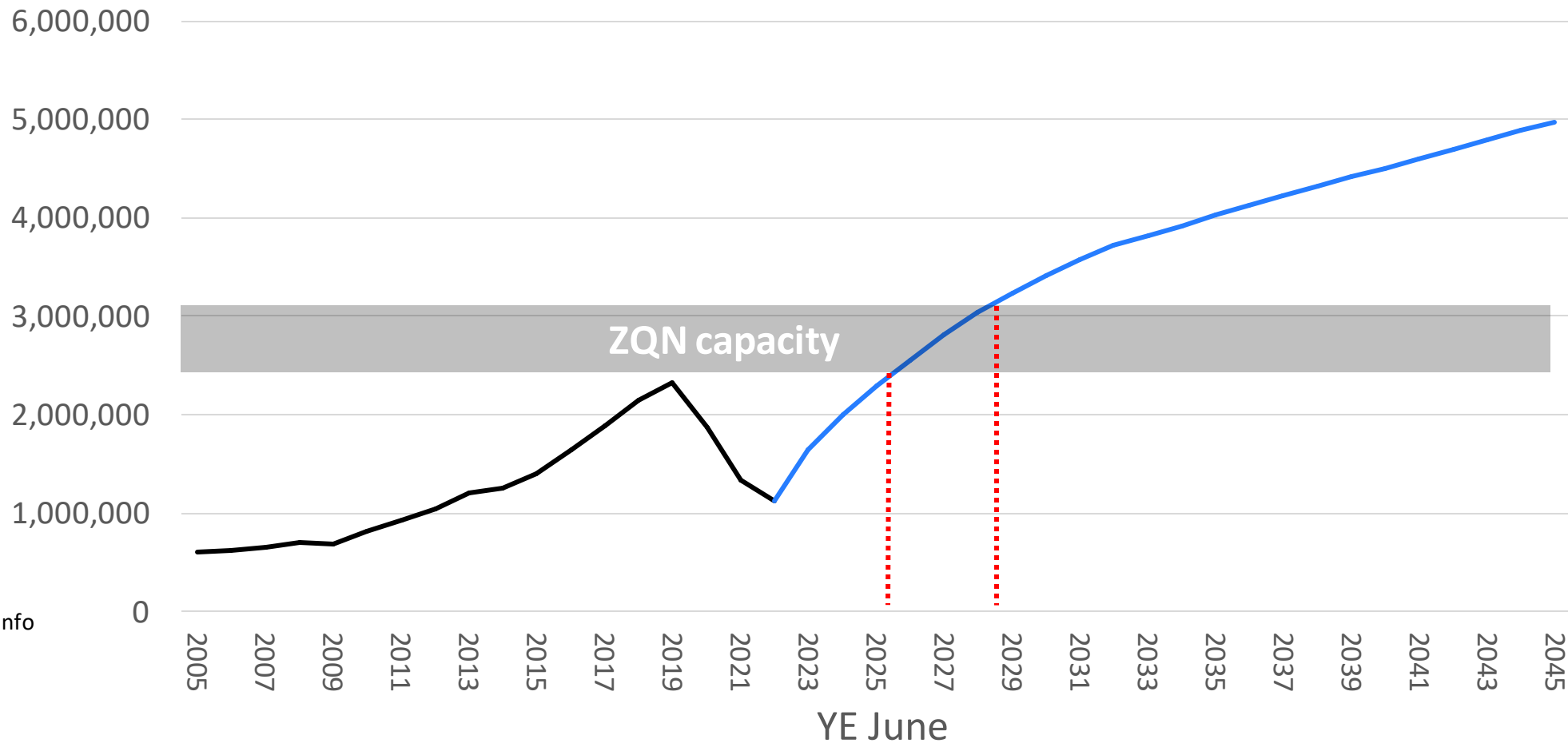


Science & technology



# Central Otago will soon be capacity constrained if it doesn't respond

Projected pax demand for Central Otago to 2045



Source: Fresh Info



# Even the most conservative forecasts indicate significant long-term growth in demand for air travel to/from Central Otago

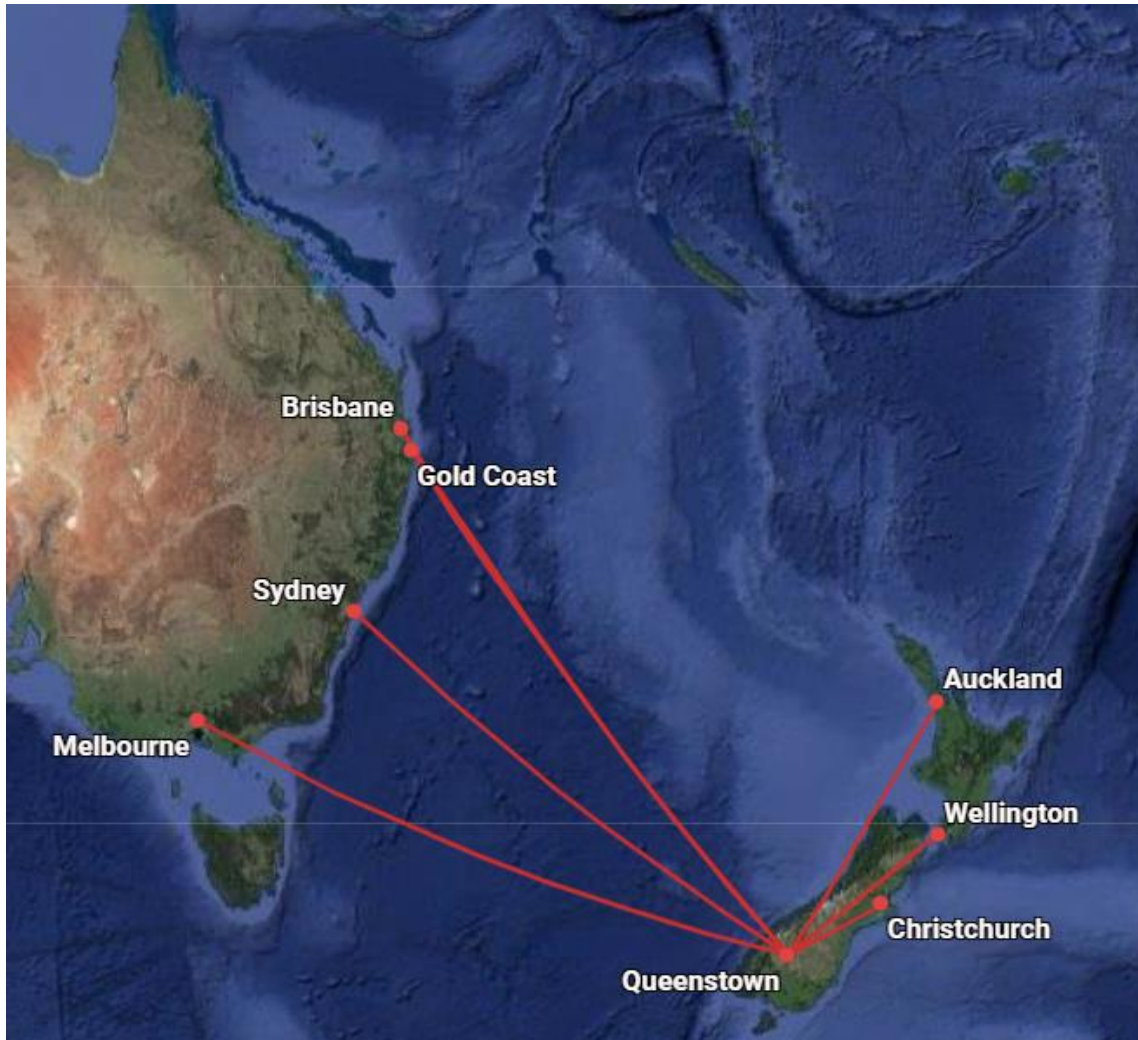
Annual growth scenarios for pax demand

	2%	3%	4%
2005	0.6M	0.6M	0.6M
2023	2.4M	2.4M	2.4M
2030	2.9M	3.3M	3.8M
2040	3.5M	4.5M	5.9M
2050	4.2M	5.8M	8.0M

It would be prudent to plan for long-term growth of 3-4% per annum.

This requires having sufficient airport capacity to handle up to 5.9M pax in 2040 and 8M pax in 2050.

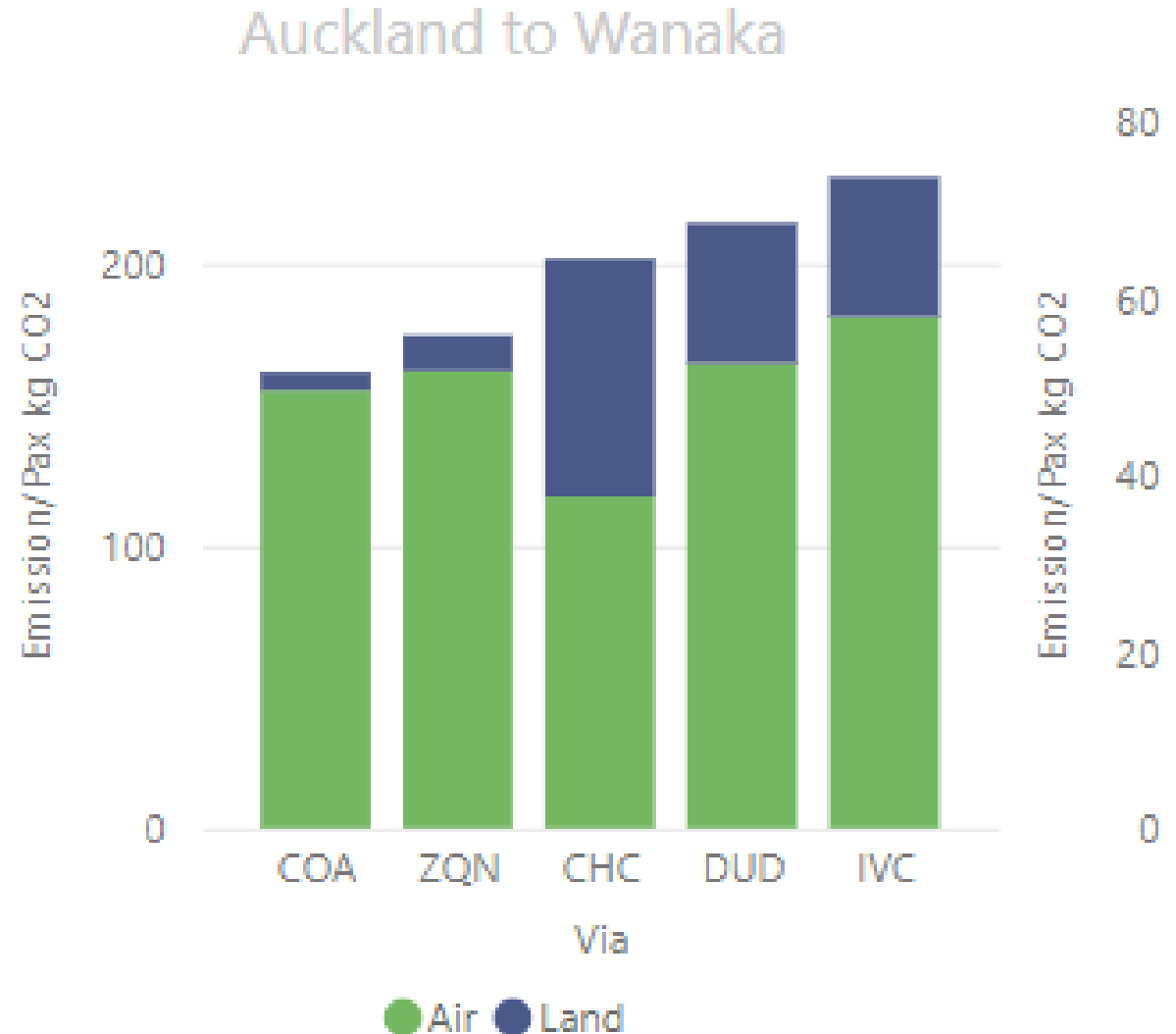
# The forecasts are based on domestic and trans-Tasman routes only



**Brisbane, Auckland, Melbourne, and Sydney (“BAMS”) will be the main drivers of future demand for travel to/from central Otago**

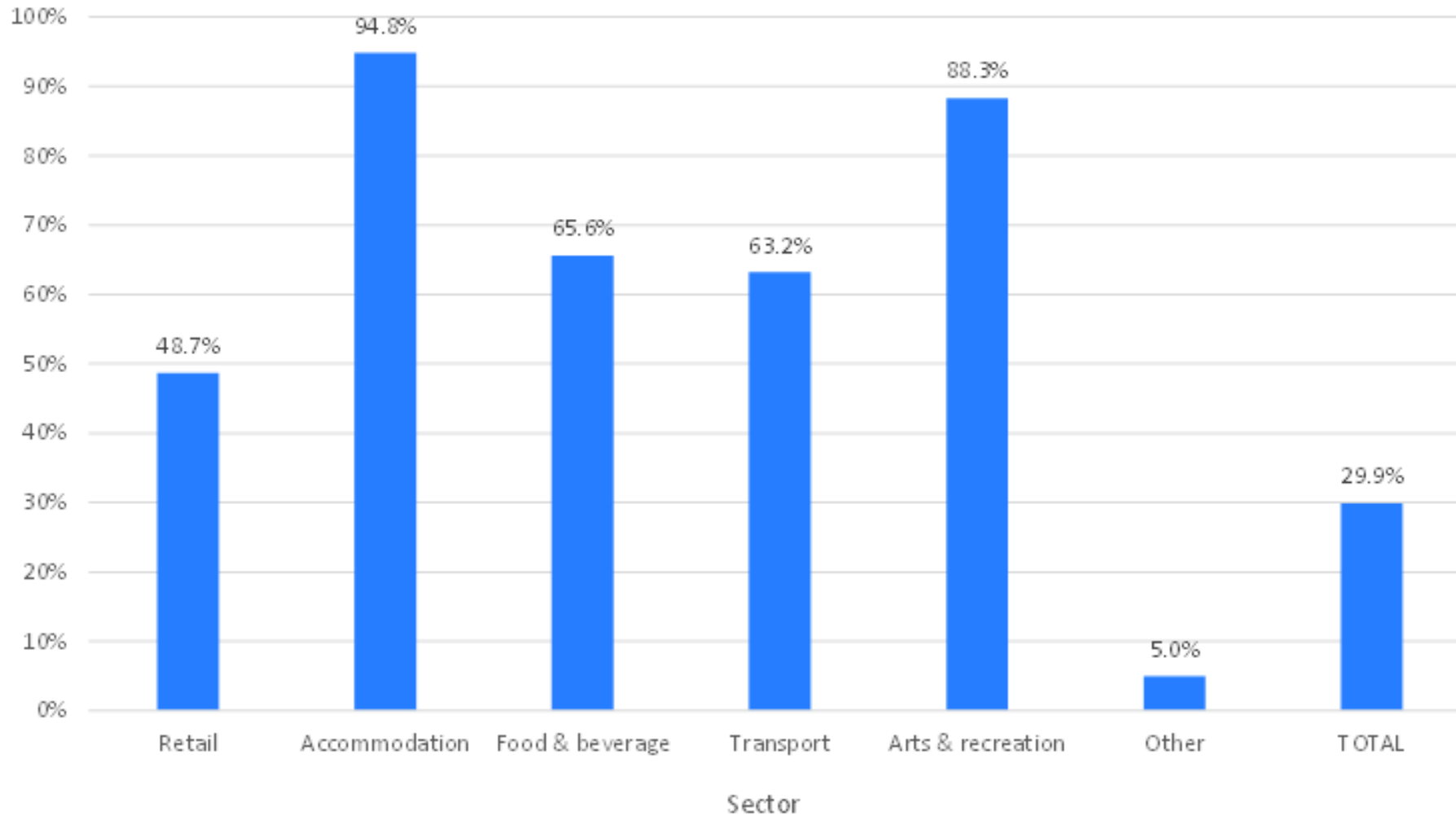
# Constrained air capacity is not a sound management strategy

- Doing nothing is not a sensible option.
- Constraining air capacity will not put a ceiling on demand – it will cause congestion, higher prices, and inefficient travel patterns.
- Travelling to and from CO will become too hard and expensive for some CO residents.
- Constraining capacity will cause people and freight to take longer journeys, producing more carbon emissions and requiring more infrastructure investment.



# Visitor spending sustains 30% of employment in Central Otago

Share of employment in Central Otago sustained by visitor spend (YE March 2019)



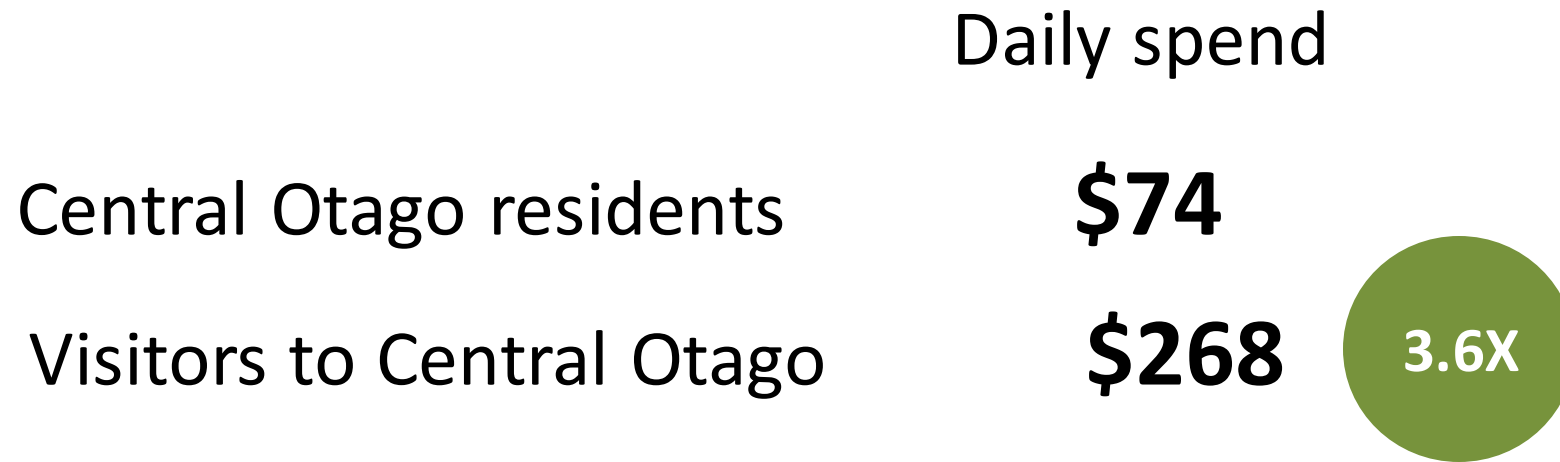
Employment earnings  
**\$557M**

Employment  
**15,460**

Visitor spend  
**\$3.85B**

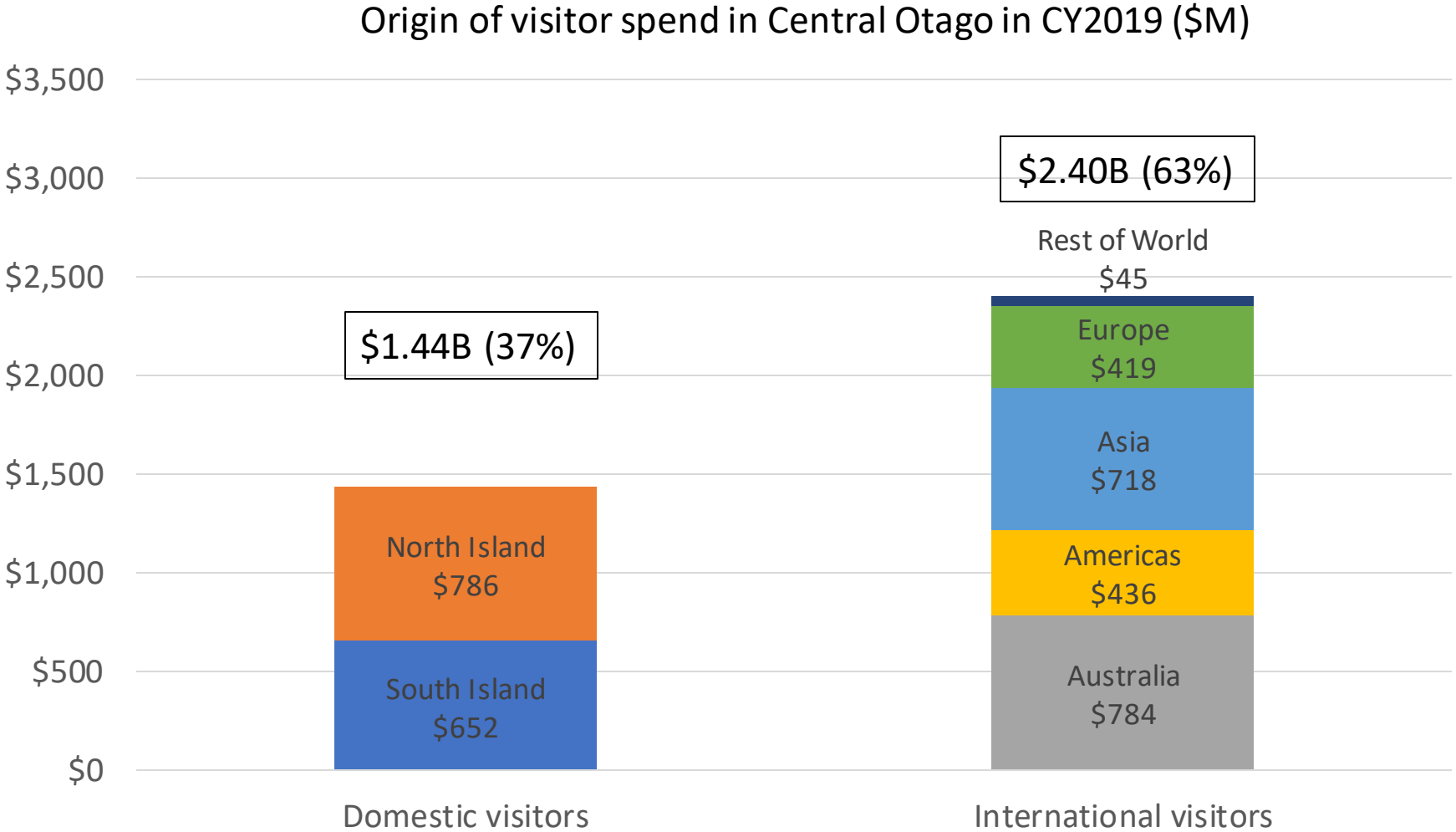
# Visitors have high spending power, which is good for business

Visitors spent an average of **\$268** per day in Central Otago in 2019 compared with **\$74** for residents



Source: MBIE; Stats NZ; Fresh Info  
Based on national averages

# International visitors accounted for almost two thirds of total visitor spend in Central Otago in 2019





# Visitors arriving in Central Otago by air stay 20% longer and spend 60% more than those arriving by road

Visitors arriving by air are more aligned with a high-quality visitor strategy than those arriving by road

	Visitors arriving in Central Otago by road	Visitor arriving in Central Otago by air	
Av. nights per visitor	3.9	4.7	1.2X
Av. spend per visitor	\$940	\$1,475	1.6X
Av. spend per visitor night	\$244	\$313	1.3X

**In addition to significant economic benefits, visitors help sustain things in Central Otago that residents value**

**The hidden value of visitation is its ability to create and sustain things that enhance the lives of Central Otago residents**



Air connectivity



Major events



Amenity

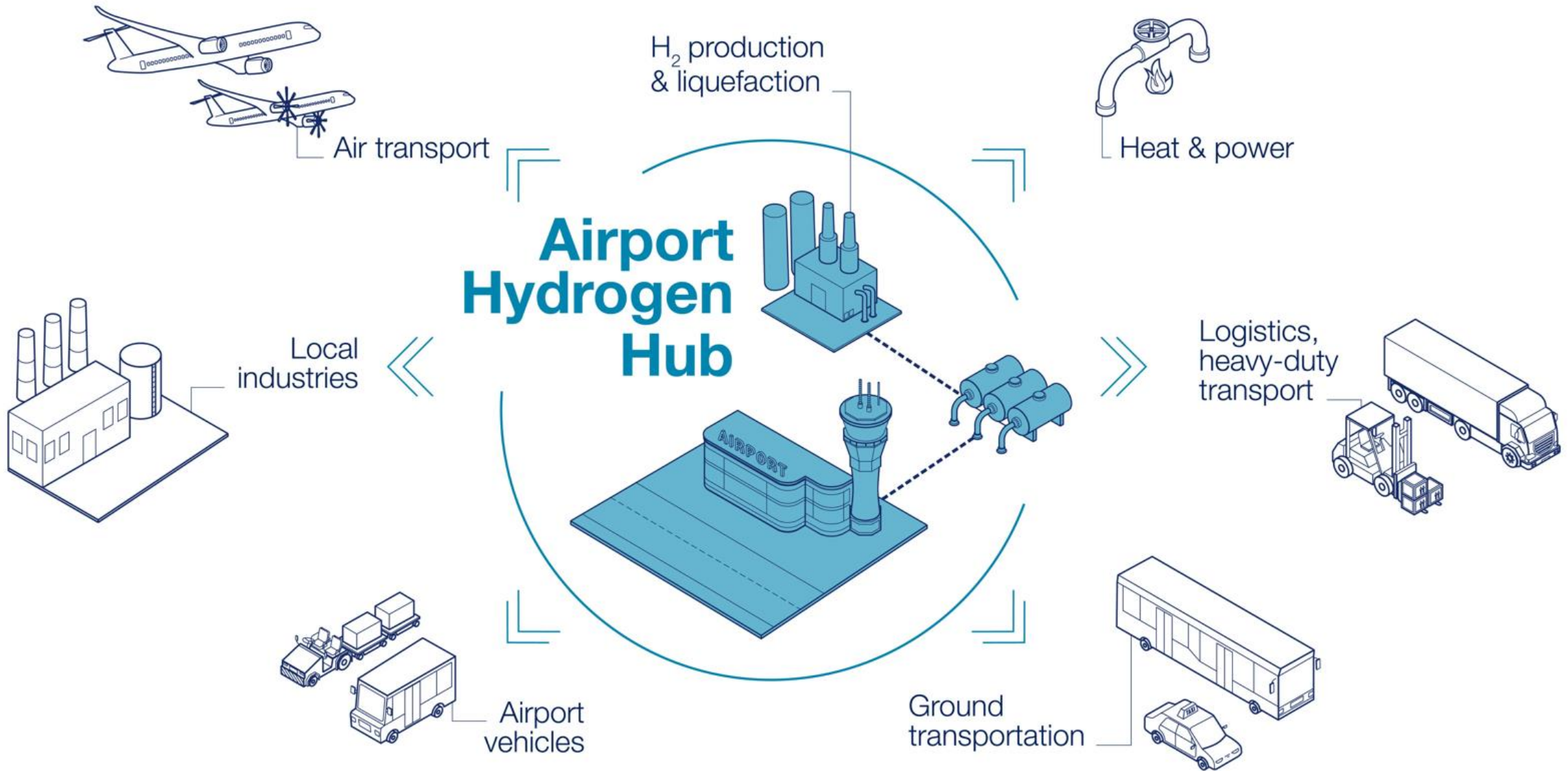


Recreational activities



Kōwhai Park





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# A new regional airport would secure high-quality air connectivity for Central Otago for the next 50+ years



**Remove airport  
infrastructure  
constraints**



**Create option to  
match best  
aircraft to route**



**Enable  
greener  
aviation**



**Enable  
operational  
efficiencies**

# Developing infrastructure is a long term undertaking requiring thoughtful consideration





Ngā mihi. Thank you.

[christchurchairport.co.nz](http://christchurchairport.co.nz)  
[kowhai-park.com](http://kowhai-park.com)  
[centralotagoairport.co.nz](http://centralotagoairport.co.nz)