

Otago Economic Overview 2013

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Background

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Executive Summary

This report describes the economy of the Otago Region in 2013 and its recent performance. It also provides a drilldown into the five local economies that make up the Otago Region: Central Otago District, Clutha District, Dunedin City, Queenstown-Lakes District, and Waitaki District.

Composition of the Otago Regional economy

In 2013, the economy in the Otago region employed 94,501 Full-Time Equivalents (FTEs) in 26,473 business units, producing \$9.24 billion in Gross Domestic Product (GDP). Summary Table 1 shows the composition of employment, GDP and business units (BUs) in the Otago Region, and shows what percentage of the nation's activity in each sector is located in the Region.

Summary Table 1 Composition of the Otago Regional economy by sector, 2013

Sectors (2013)	FTEs	% of Otago	% of NZ	GDP (2013\$m)	% of Otago	% of NZ	Business units	% of Otago	% of NZ
Primary	11,056	11.7%	7.7%	1,081	13.6%	6.7%	4,734	17.9%	6.6%
Manufacturing	8,820	9.3%	4.0%	1,177	14.8%	3.9%	931	3.5%	4.2%
Construction	8,656	9.2%	5.5%	580	7.3%	5.5%	2,782	10.5%	5.5%
Wholesale and Distribution	6,823	7.2%	3.6%	906	11.4%	3.7%	1,524	5.8%	4.3%
Retail Trade and Services	21,033	22.3%	6.3%	1,102	13.9%	6.0%	4,205	15.9%	5.6%
Business Services	13,282	14.1%	3.7%	1,456	18.3%	2.8%	9,850	37.2%	4.7%
Arts and Recreation Services	2,194	2.3%	7.4%	152	1.9%	7.4%	675	2.5%	6.8%
Social Services	22,636	24.0%	5.0%	1,485	18.7%	4.8%	1,772	6.7%	5.2%
Sub-total (excluding O.O.D.)	94,501	100.0%		7,937	100.0%		26,473	100.0%	100.0%
Owner-Occupied Dwellings (O.O.D.)*				1,301		4.8%			
Total	94,501		5.0%	9,239		4.4%	26,473		5.2%

* Imputed value, included in Total GDP only

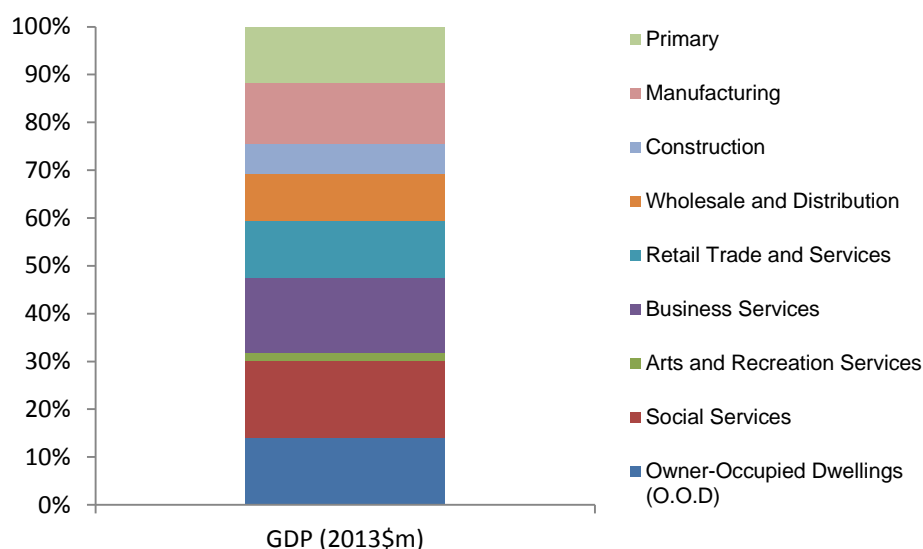
Source: BERL Regional Database, 2013

In terms of their share of employment in the region, the largest sectors are, by a considerable margin, Social services and the Retail trade and services. However, the region's GDP is more evenly spread, with the Primary sector, Manufacturing, and the Business services all accounting for a large share. The Business Services sector also accounts for more than one-third of the region's business units.

Otago has a little less than 5 percent of New Zealand's population, and the table shows that the region has a relatively large share of New Zealand's employment and GDP in the Primary, Retail trade and services, and Arts and recreation services sectors.

Summary Figure 1 shows the shares of the Otago Region's GDP, including the imputed value of GDP generated by owner-occupied dwellings. Just over one-half of the Region's output was generated in the service sectors¹, around one-fifth in Manufacturing and Construction, one-tenth in Primary industries, and a seventh by owner-occupied dwellings².

Summary Figure 1 Composition of the Otago Region's GDP by sector, 2013



Summary Table 2 shows the shares of employment, GDP and business units by district within the region and highlights Dunedin City as the location of more than half of the economic activity in the region in terms of both employment and GDP. Queenstown Lakes District's share of the region's employment is larger than its share of the region's GDP, whereas the opposite is the case for Clutha District.

Summary Table 2 Composition of the Otago Regional economy by District, 2013

Territorial Authority (2013)	FTEs	% of Region	GDP (2013\$m)	% of Region	Business units	% of Region
Central Otago	10,419	11%	1,000	11%	3,340	13%
Clutha	8,904	9%	989	11%	3,017	11%
Dunedin City	49,874	53%	4,921	53%	10,771	41%
Queenstown-Lakes	15,695	17%	1,321	14%	6,461	24%
Waitaki	9,608	10%	1,007	11%	2,884	11%
Otago Region	94,501	100%	9,239	100%	26,473	100%

Source: BERL Regional Database 2013

¹ The service sectors are Wholesale and Distribution; Retail and Trade Services; Business Services; Arts and Recreation Services; and Social Services.

² People living in houses they own are considered to be producing housing services that are consumed by those same households. In contrast to the majority of economic activity included in GDP, there is no market transaction for this service. Therefore, the output of the housing services produced by owner-occupiers is valued at the estimated rent for such a dwelling.

2013 economic performance

Otago Region

In 2013, the population in the region grew fractionally faster than it did in New Zealand as a whole. However, the region's GDP and GDP per capita growth were both slightly slower than New Zealand's. There was little employment growth nationally in the year to March 2013, and a 0.1 percent drop in employment in Otago. Productivity growth in the region was on a par with productivity growth nationally.

Summary Table 3 Key performance indicators, 2013³

Key Performance Indicators	%pa for 2013 year	
	Otago Region	New Zealand
Resident population grow th	0.9	0.8
GDP grow th	2.4	2.7
GDP per capita grow th	1.4	1.8
Employment grow th	-0.1	0.2
Labour productivity grow th	2.7	2.7
Business units grow th	1.4	0.7
Business size grow th	-1.5	-0.5

Source: BERL Regional Database, 2013

Summary Figure 2 compares the performance of the Otago region with the performance of its neighbouring regions by presenting a selection of the indicators from the table above in graphical form.

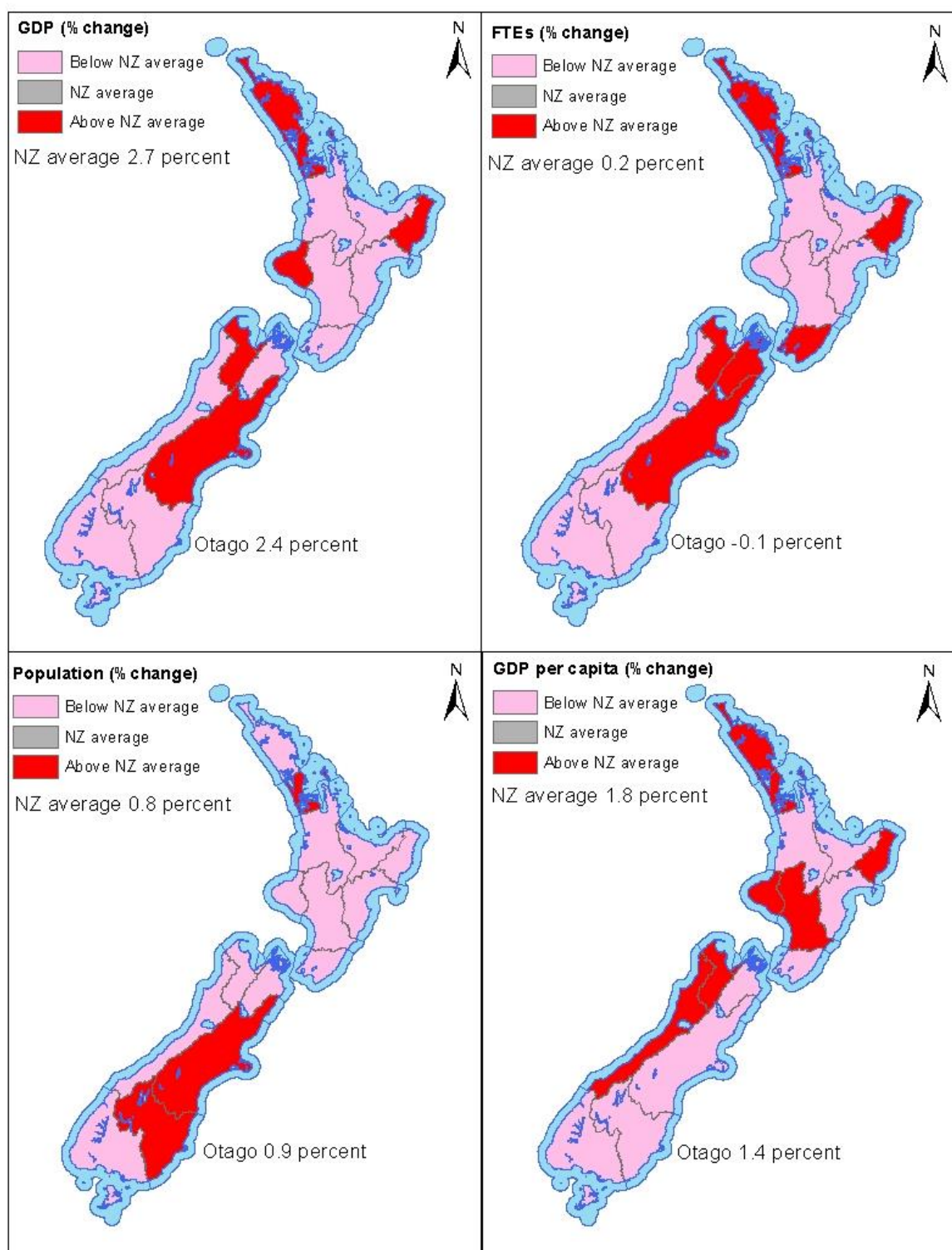
Otago was below the national average on GDP, FTE and GDP per capita growth and above the average for population change. The West Coast was below the national average for GDP, FTE and population growth and Southland was below the national average on all four of the indicators. In contrast, Canterbury was above the national average in GDP, FTE and population growth.

The Districts

Summary Table 4 provides a snapshot of the economic performance of the five districts within Otago in 2013, and includes the regional and national performance indicators to put the districts' performances into context.

³ Throughout this report, where a key performance indicator for the region or a particular district is better than the national KPI, the indicator is highlighted in green.

Summary Figure 2 Otago Region and New Zealand, selected KPIs, 2013



Summary Table 4 Key performance indicators by District, 2013

Key Performance Indicators	% pa for 2013 year						
	Central Otago District	Clutha District	Dunedin City	Queenstown-Lakes District	Waitaki District	Otago Region	New Zealand
Resident population growth	1.6	0.0	0.5	3.4	0.5	0.9	0.8
GDP growth	6.5	2.5	2.0	5.1	-3.0	2.4	2.7
GDP per capita growth	4.8	2.5	1.5	1.6	-3.4	1.4	1.8
Employment growth	3.7	0.7	-1.1	2.8	-4.4	-0.1	0.2
Labour productivity growth	3.3	2.0	3.4	2.5	1.0	2.7	2.7
Business units growth	1.8	0.5	1.1	2.3	0.9	1.4	0.7
Business size growth	1.8	0.2	-2.1	0.5	-5.3	-1.5	-0.5

Source: BERL Regional Database, 2013

The table highlights the contrasting fortunes of the five districts. Central Otago's economy performed better than the region's economy in terms of all seven of the indicators shown, while Queenstown Lakes' economy performed better in terms of all but labour productivity growth. Clutha's economy also had a relatively good year in terms of GDP growth, GDP growth per capita, employment growth and business size growth. At the other end of the scale, Waitaki's economy had a difficult year primarily due to a fall in employment and GDP in food product and textile leather clothing and footwear manufacturing. Dunedin's economy performed below the rest of the region in all but two indicators: GDP per capita and labour productivity growth.

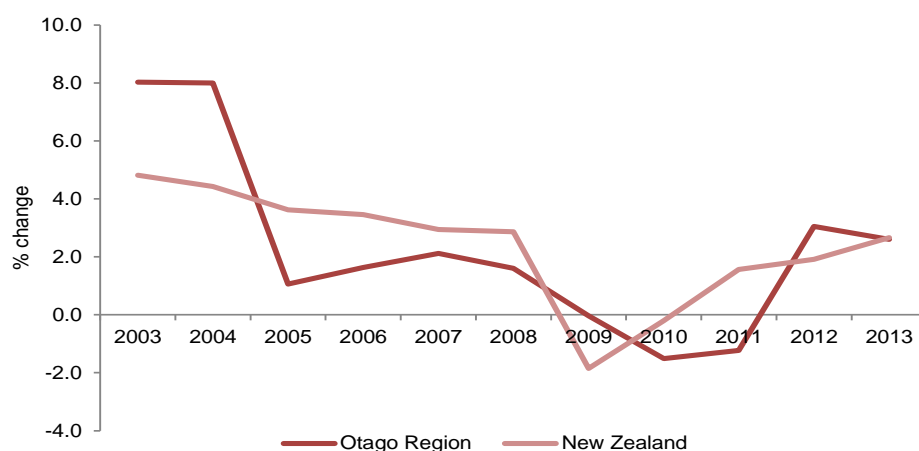
Central Otago's economy also performed strongly compared to the national economy in terms of all of the indicators, while Waitaki's performed below the national average in all but one of the indicators.

2003-2013 economic performance

Otago Region

Summary Figure 3 compares the GDP growth rates in Otago and New Zealand as a whole between 2003 and 2013. It shows that the Otago economy was growing much faster than the national economy in 2003 and 2004, but that the region's economy has grown more slowly than New Zealand's in all but two years since then.

Summary Figure 3 Otago Region and New Zealand GDP growth trend, 2003 - 2013



Source: BERL Regional Database, 2013

Summary Table 5 presents a broader view of Otago's longer-term economic performance, relative to New Zealand's. It shows that Otago's population, employment and labour productivity grew slightly slower than New Zealand's between 2003 and 2013. It also shows that the number of business units in the region grew more quickly than nationally. However, GDP and GDP per capita growth in the region were both comparatively slow.

Summary Table 5 Key performance indicators for Otago Region, 2003 - 2013

Key Performance Indicators	%pa for 2003 - 2013	
	Otago Region	New Zealand
Resident population grow th	0.8	0.9
GDP grow th	1.7	2.1
GDP per capita grow th	0.9	1.2
Employment grow th	1.2	1.5
Labour productivity grow th	0.4	0.7
Business units grow th	2.4	1.8
Business size grow th	-1.1	-0.3

Source: BERL Regional Database, 2013

The districts

Summary Table 6 presents a longer-term view of the economic performance of the five districts within Otago. Again, the table also includes the regional and national performance indicators to put the districts' performances into context.

The table shows that the Central Otago economy performed more strongly than the regional economy between 2003 and 2013 in terms of all seven of the indicators shown. GDP and employment growth in the district were especially strong. The Queenstown Lakes and Waitaki economies each out-performed the regional economy in terms of five of the indicators.

By contrast, the Clutha economy performed less strongly than the regional economy in terms of four of the seven indicators, and Dunedin's economy was weaker than the regional economy in terms of all seven indicators. Dunedin's GDP growth rate was slightly less than half the region's between 2003 and 2013, while its employment growth rate was only one-third of the regional growth rate.

Summary Table 6 Key performance indicators by district, 2003 - 2013

Key Performance Indicators	% pa 2003 - 2013						New Zealand
	Central Otago District	Clutha District	Dunedin City	Queenstown-Lakes District	Waitaki District	Otago Region	
Resident population growth	1.6	-0.1	0.2	3.8	0.3	0.8	0.9
GDP growth	4.1	1.2	0.8	4.3	2.0	1.7	2.1
GDP per capita growth	2.5	1.3	0.5	0.5	1.6	0.9	1.2
Employment growth	3.4	0.2	0.4	3.6	1.4	1.2	1.5
Labour productivity growth	0.9	1.0	0.3	0.6	0.7	0.4	0.7
Business units growth	2.8	0.5	1.7	5.2	1.3	2.4	1.8
Business size growth	0.5	-0.3	-1.3	-1.5	0.1	-1.1	-0.3

Source: BERL Regional Database, 2013

On the face of it, the difference between Dunedin's 0.4 percent per annum employment growth rate and the region's 1.2 percent per annum may not seem large, but compounded over a decade the effect is considerable. Between 2003 and 2013, the region's employment grew by 13 percent. Between 2003 and 2013, Dunedin's employment grew by just 4 percent.

Between 2003 and 2013, Central Otago's economy performed better than the national economy in terms of all seven indicators. The Queenstown Lakes economy performed better than the national economy in terms four of the indicators. The Clutha and Waitaki economies both performed more strongly than the national economy in terms of just two of the indicators, while Dunedin's economy lagged in terms of all seven indicators.

Key sectors

This report also examines the performance of six key sectors that are particularly relevant to the Otago Region:

- Tourism⁴
- Primary production
- Primary processing
- Creative
- Education and research
- Engineering, and machinery and equipment manufacturing.

The performance of the key sectors, expressed in terms of employment growth, has been patchy. Collectively, the key sectors excluding Tourism grew in 2013, while the non-key sectors experienced a decline. However, between 2003 and 2013, the key sectors, again excluding Tourism, grew considerably more slowly than the non-key sectors.

The tourism sector had a relatively poor year in 2013, but it grew rapidly between 2003 and 2013 as a whole. Amongst the other key sectors, Education and research and Engineering, machinery and equipment manufacturing both performed strongly, relative to the economy as a whole, over the longer-term.

Summary Table 7: Key sectors, Employment summary, Otago Region, 2003 - 2013

Key sectors employment (FTEs)					%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Primary production	9,838	10,727	10,937	11,056	1.1	1.2
Primary processing	7,153	5,067	5,289	5,282	-0.1	-3.0
Creative	2,178	2,069	1,994	1,923	-3.6	-1.2
Education and research	7,674	9,370	8,907	9,356	5.0	2.0
Engineering, machinery and equipment manufacturing	910	1,124	1,201	1,168	-2.8	2.5
Key sectors (excluding Tourism)	27,753	28,357	28,327	28,785	1.6	0.4
Non-key sectors	55,734	65,585	66,298	65,715	-0.9	1.7
Total employment: Otago Region	83,487	93,942	94,626	94,501	-0.1	1.2
Tourism sector	5,284	9,014	9,715	9,572	-1.5	6.1

Source: BERL Regional Database 2013

Summary Table 8 shows that the performance of the key sectors in terms of GDP growth was patchy over the 10 years. Collectively, the key sectors excluding Tourism grew at almost twice the rate of the non-key sectors in 2013, but their growth between 2003 and 2013 was comparatively sluggish.

The Tourism sector had a relatively poor year in 2013, but it grew rapidly between 2003 and 2013 as a whole. Amongst the other key sectors, Primary production and Engineering, machinery and equipment manufacturing were both strong long-term performers.

⁴ BERL's tourism module uses information from the BERL Regional Database, national Tourism Satellite Account (TSA) ratios and regional information on guest nights in a district, capacity information, international/domestic visitor detail, and attractions information. This approach allows, for instance, for the fact that in Queenstown almost all of the accommodation industry may be servicing tourism while, in other parts, the figure may be far lower than the national TSA estimate of 66 percent.

Summary Table 8: Key sectors, GDP summary, Otago Region, 2003 - 2013

Key sectors GDP (2013\$m)					%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Primary production	824	841	1,027	1,081	5.2	2.7
Primary processing	937	694	733	745	1.7	-2.3
Creative	79	68	73	71	-2.2	-1.0
Education and research	436	478	460	484	5.2	1.1
Engineering, machinery and equipment manufacturing	85	105	115	112	-2.1	2.8
Key sectors (excluding Tourism)	2,361	2,187	2,408	2,493	3.5	0.5
Non-key sectors	5,441	6,604	6,617	6,745	1.9	2.2
Total GDP: Otago Region	7,802	8,791	9,025	9,239	2.4	1.7
Tourism sector	376	540	574	568	-1.0	4.2

Source: BERL Regional Database 2013



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1 Introduction

This report describes the economic performance of the Otago Region in 2013. It provides key economic indicators for the five local economies that make up the Otago Region - Central Otago District, Clutha District, Dunedin City, Queenstown-Lakes District, and Waitaki District.

The economic overview uses data for the year ending March 2013 from BERL's Regional Database, which BERL constructs from Statistics New Zealand data. The key Business Demography data is gathered around March each year and is usually available by October/November of the same year.

The analyses of economic performance by industry are based on the 2006 Australian and New Zealand Industry Classification (ANZSIC06) system.⁵ This system assigns economic activity into 86-industry classifications, which are grouped into eight standard sectors as follows:⁶

- Primary
- Manufacturing
- Construction
- Wholesale and distribution
- Retail trade and services
- Business services
- Arts and recreation services
- Social services

This report also examines the performance of selected sectors that are key to the Otago Region economy. The analysis shows GDP, employment and business unit growth for the region and for each district to 2013. The sectors are:

- Tourism⁷
- Primary production
- Primary processing
- Creative
- Education & research
- Engineering, machinery & equipment manufacturing

For some districts, we have also included additional sectors such as: the Information Communication Technology (ICT) sector for Dunedin City; Horticulture and viticulture for Central Otago; and Dairy and sheep and the Housing market for Waitaki.

⁵ The most recent classification of industry-level data is an internationally comparable, industrial classification system. It includes new activities such as internet publishing and broadcasting or provision of Internet access services.

⁶ This differs from regional and district profiles prepared before 2011, which focused on seven sectors classified based on the 1996 Australian and New Zealand Industry Classification (1996 ANZSIC). These earlier profiles covered all seven sectors, but the Retail trade and services and the Arts and Recreation services are now treated as separate sectors.

⁷ The Tourism sector is not classified as a distinct sector in the ANZSIC system. Instead, tourism-related activity is recorded across a range of industries, which we group into a tourism sector for this report.

1.1 Structure of the report

This report begins with an economic overview of the Region and then breaks this down by district.

- Section 2 looks at the economic performance and activity of the Otago Region. This section includes more detailed analysis of employment and GDP than for the individual districts.
- Sections 3 through to 7 look at each of the five districts within the Otago Region.
- Section 8 includes technical details and more detailed summary tables for each of the districts.

Larger numbers cited in the text are typically rounded to the nearest ten, and therefore may not match the estimated figures or changes in the tables/figures (which are not rounded).

1.2 Methodological issues: caveats, revisions and improvements

This report draws on the latest official data, uses the most recent official classification standard, and incorporates methodological improvements. To identify changes over time and trends, figures for different years reported in this overview can be compared as this report uses a consistent time series and methodology. However, some figures reported here will not match the corresponding figure in previous reports due to methodological changes and source data revisions. Changes, or trends, should not be based on figures from the previous reports.

Sections 8.1 and 8.2, document these issues more fully.

1.2.1 Classification changes

The international standards and classifications used to construct official statistics are changed periodically, with major upgrades happening every 10 to 15 years. In 2011, Statistics NZ converted from the 1996 Australian and New Zealand Industry Classification (ANZSIC96) to the ANZSIC06 system.

BERL started implementing ANZSIC06 in our regional database in 2011. BERL revised the data series in the BERL Regional Database to conform to the new industry classifications, and all data from previous years up to and including 2013 are consistently classified using this standard.

BERL has been assisting the Otago Region with economic profiles for a number of years. Therefore, we wish to note that some earlier reports employed the ANZSIC96 classification. This will affect the comparability of reports before 2011 with reports prepared using ANZSIC06.

1.2.2 Revisions to the official statistics

This profile uses official statistics on employment, activity units and output (GDP) from Statistics New Zealand, and an associated database developed by BERL: the BERL Regional Database.

On occasion, Statistics New Zealand revises historical data. For example, Statistics New Zealand issued substantially revised GDP figures in December 2011, with changes to figures going back a number of years. We incorporate this new information in our latest report to reflect the most up-to-date and accurate official statistics. This means some figures for a particular area, industry and year will differ in this report compared to previous economic profiles for the Otago Region.

2 Otago Region

This section gives an overview of the Otago Region's latest and longer term economic performance. The review begins with the most recent performance, for the year to March 2013, and then considers the longer-term trends over the decade, 2003-2013. The remainder of the section examines, in turn, the Region's performance in terms of employment, GDP, business units, relative strengths (location quotients) and in key sectors.

2.1 Economic performance

Table 2.1 shows key indicators for the Otago Region compared to New Zealand in 2013. Overall, it suggests a relatively weak economic performance, compared to a strong year in 2012 when Otago GDP grew 2.8 percent, compared to 1.9 percent nationally.

- The Otago Region performed better than the country as a whole in terms of population growth and growth in the number of business units.
- The region was on a par with the country as a whole in terms of labour productivity growth.
- However, it performed worse in terms of GDP growth, GDP per capita and employment growth and growth in the size of businesses.

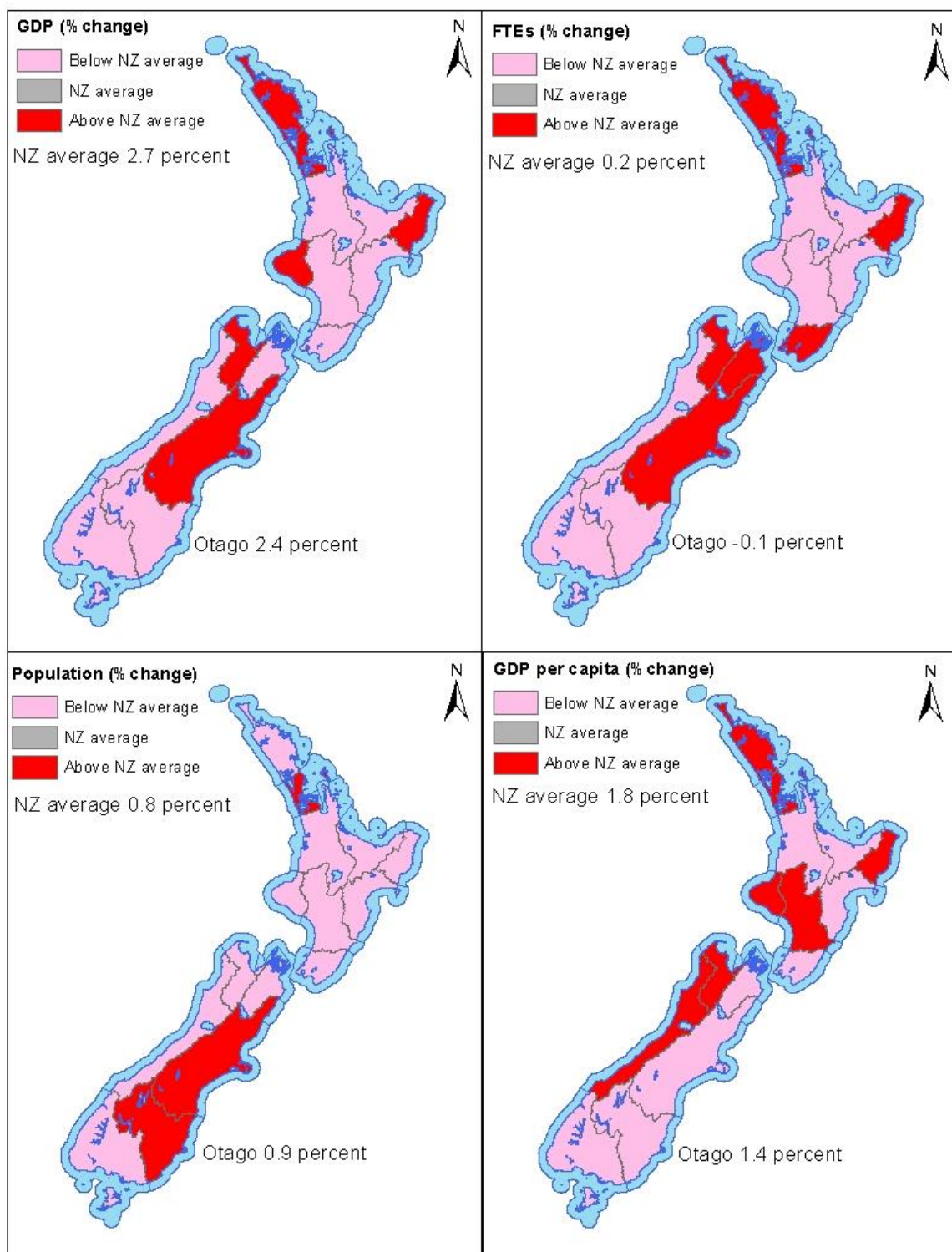
Table 2.1 Key performance indicators, Otago Region and New Zealand, 2013

Key Performance Indicators	%pa for 2013 year	
	Otago Region	New Zealand
Resident population growth	0.9	0.8
GDP growth	2.4	2.7
GDP per capita growth	1.4	1.8
Employment growth	-0.1	0.2
Labour productivity growth	2.7	2.7
Business units growth	1.4	0.7
Business size growth	-1.5	-0.5

Source: BERL Regional Database, 2013

Figure 2.1 presents in maps the results from Table 2.1 for selected key performance indicators.

Figure 2.1 Otago Region and New Zealand percent change in selected KPIs, 2013



2.2 Longer term performance

During the past 10 years, the Otago Region performed worse than the national economy in terms of population, GDP, GDP per capita, employment and labour productivity growth. The differentials do not appear to be large but, compounded over a decade they are significant.

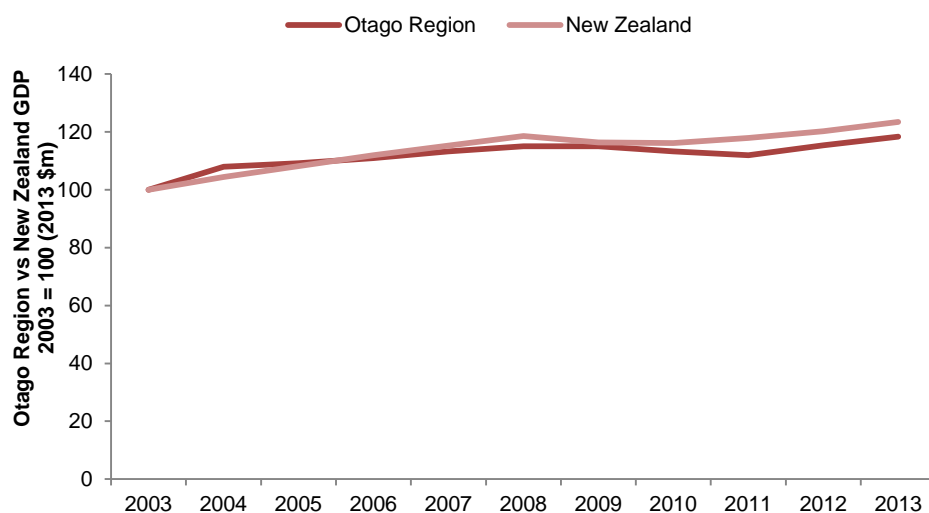
Table 2.2 Key performance indicators, Otago Region and New Zealand, 2003-2013

Key Performance Indicators	%pa for 2003 - 2013	
	Otago Region	New Zealand
Resident population growth	0.8	0.9
GDP growth	1.7	2.1
GDP per capita growth	0.9	1.2
Employment growth	1.2	1.5
Labour productivity growth	0.4	0.7
Business units growth	2.4	1.8
Business size growth	-1.1	-0.3

Source: BERL Regional Database, 2013

Figure 2.2 shows the GDP growth trend for the Otago Region and New Zealand over the 10 year period to 2013 by indexing GDP in 2003 to 100. The graph indicates that GDP growth in the region fell behind the national growth rate in the period from 2009 to 2011. In other words, the region's economy did not start to recover until after the national economy started to recover.

Figure 2.2 Otago Region and New Zealand GDP growth trend, 2003 to 2013



Source: BERL Regional Database, 2013

2.3 Employment – Otago Region

This section looks in more detail at employment trends in the Otago Region and compares them to overall New Zealand trends. It also outlines employment trends by sector in 2013 and over the past 10 years.

2.3.1 Employment trends

Table 2.3 provides a summary of employment in the Otago Region from 2003 to 2013 broken down by eight standard sectors.

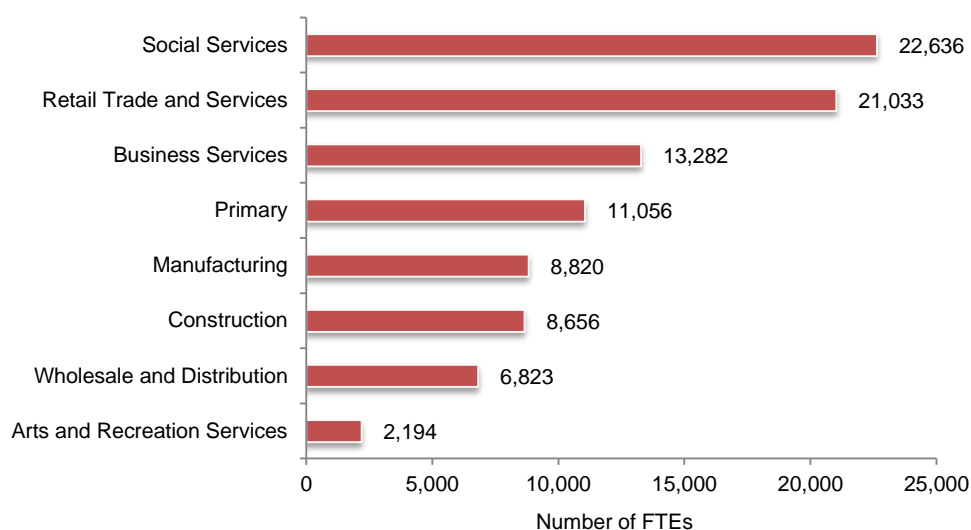
Table 2.3 FTE summary, Otago Region, 2003 - 2013

Sector	Employment Number FTEs				%pa change		
	2003	2011	2012	2013	2012	2013	2003 to 2013
Primary	9,838	10,727	10,937	11,056	2.0	1.1	1.2
Manufacturing	11,783	8,810	8,880	8,820	0.8	-0.7	-2.9
Construction	6,825	9,408	9,140	8,656	-2.9	-5.3	2.4
Wholesale and Distribution	5,942	6,354	6,586	6,823	3.7	3.6	1.4
Retail Trade and Services	19,484	20,277	20,851	21,033	2.8	0.9	0.8
Business Services	9,975	13,386	13,438	13,282	0.4	-1.2	2.9
Arts and Recreation Services	1,767	2,429	2,551	2,194	5.0	-14.0	2.2
Social Services	17,873	22,552	22,244	22,636	-1.4	1.8	2.4
Otago Region	83,487	93,942	94,626	94,501	0.7	-0.1	1.2
New Zealand	1,625,492	1,860,767	1,878,583	1,883,050	1.0	0.2	1.5

Source: BERL Regional Database, 2013

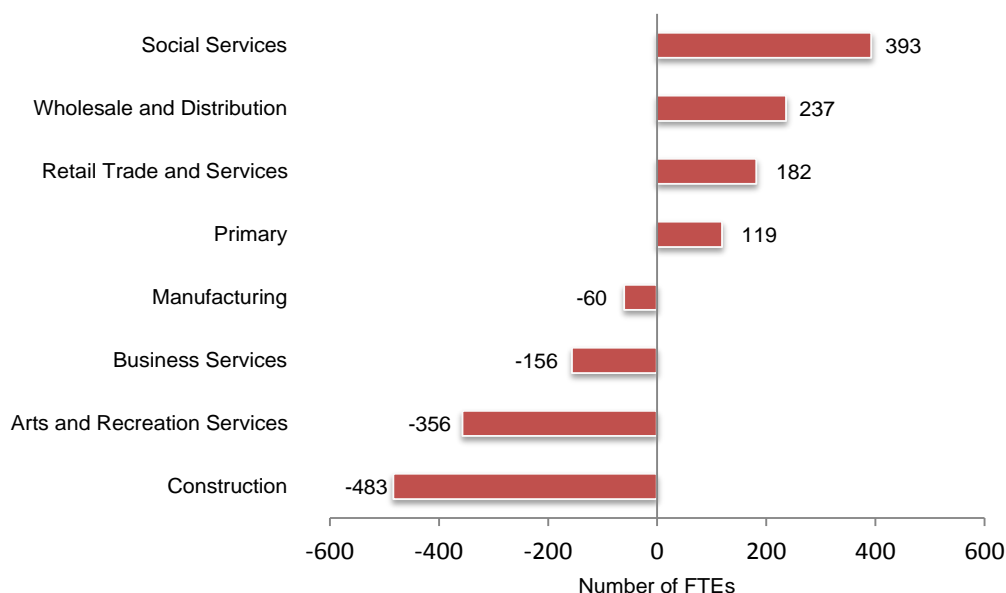
In total, the region had 94,501 full-time equivalent (FTE) employees in 2013. This was fractionally down on the 2012 number, but around 11,000 more than in 2003. Over the ten year period, employment in the region grew by 13.2 percent, while national employment grew by 15.8 percent.

Figure 2.3 shows 2013 employment in Otago in the eight standard sectors of the economy. Almost half or 46 percent of all employment in the region is in just two sectors: Social services (which include mainly education, health and various other central and local government services) and the Retail trade and services. Business services account for almost 14 percent of employment, and the Primary sector accounts for almost 12 percent of employment.

Figure 2.3 Key sector employment, Otago Region, 2013

Source: BERL Regional Database, 2013

Figure 2.4 shows the change in employment in the standard sectors in 2013. With the exception of Business services, the largest sectors in the regional economy grew the most despite an overall decline in employment in 2013.

Figure 2.4 Employment change by sector, 2013

Source: BERL Regional Database, 2013

Table 8.5, at the back of report, provides a more detailed breakdown of employment change in the region in the year to March 2013. The three industries with the largest employment gains were:

- Preschool and school education (up 354 FTEs)
- Food and beverage services (up 332 FTEs) and
- Food retailing (up 346 FTEs).

Conversely, the three industries with the largest falls in employment were:

- Construction services (down 315 FTEs)
- Accommodation (down 309 FTEs) and
- Building clearing, pest control and other support services (down 281 FTEs).

Table 2.4 presents the region's ten largest industries (out of 86) with the greatest employment in 2013. Agriculture is the largest employer in the region, accounting for 8.6 percent of total employment. In combination, the top ten industries account for 49.7 percent of all FTEs in the region.

Table 2.4 Ten largest employment industries, Otago Region, 2013

Rank by FTE size	Industry	Employment (FTEs)	
		2013	% of total
1	Agriculture	8,091	8.6
2	Food and Beverage Services	5,295	5.6
3	Other Store-Based Retailing	4,798	5.1
4	Tertiary Education	4,460	4.7
5	Construction Services	4,271	4.5
6	Professional Scientific and Technical Services (exc Comp Sys Dsn & related)	4,243	4.5
7	Preschool and School Education	4,203	4.4
8	Food Product Manufacturing	4,140	4.4
9	Accommodation	3,736	4.0
10	Hospitals	3,711	3.9

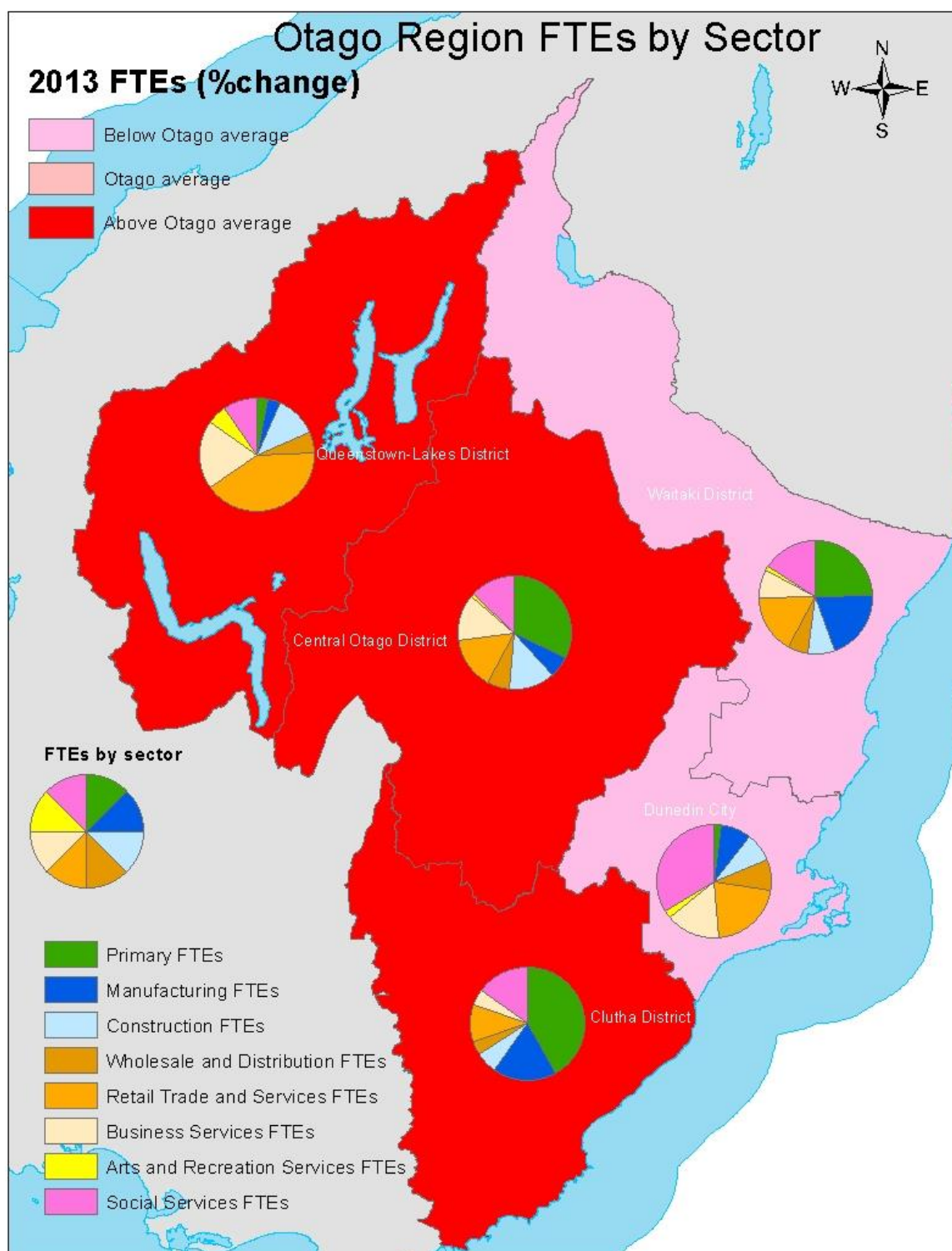
Source: BERL, Statistics NZ

Figure 2.5 shows the sectoral breakdown of employment by district, and the districts where employment grew faster than the regional average in 2013.

The largest share of employees in Central Otago; Clutha; and Waitaki Districts are in the Primary sector. The Social services sector is Dunedin City's biggest sector, by employment, which includes the Education industry. For the Queenstown-Lakes District, the Retail trade and services sector employees the largest share. See section 8.4 for a table of the figures used for the chart.

Overall, employment in Central Otago, Clutha and Queenstown Lakes Districts grew faster than the Otago average, whereas the opposite was true for Dunedin City and Waitaki District.

Figure 2.5 FTEs by industry, Otago Region, 2013



2.3.2 10-year horizon employment performance

Employment growth in the region was modest from 2003 to 2013. Regional employment peaked in 2009 at around 96,000 FTEs. The region's strong employment gains prior to the 2008 economic slowdown helped keep its overall per annum growth at 1.2 percent over the last ten years. However, employment in 2013 was around 1,500 FTEs below the peak level. Employment dipped slightly in 2010, but recovered in 2011 and 2012 before falling again in 2013.

Figure 2.6 compares employment growth in the Otago Region with New Zealand from 2003 to 2013.

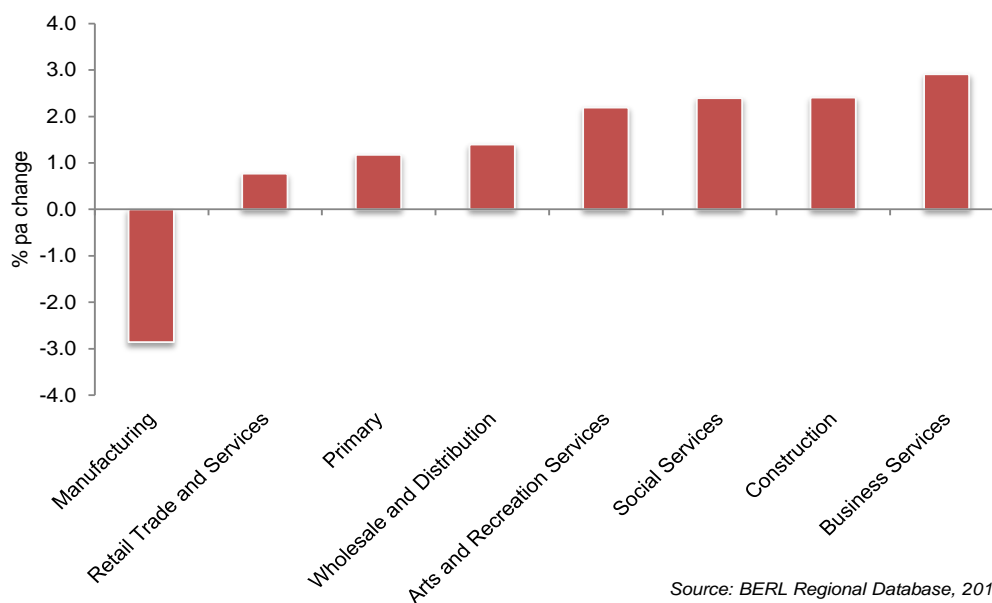
Figure 2.6 Employment growth, Otago Region and New Zealand, 2003 to 2013



Source: BERL Regional Database, 2013

Figure 2.7 shows the average growth rate over the last ten years in the Otago Region for the eight standard sectors of the economy.

Figure 2.7 Employment trend by sector, Otago Region, 2003 - 2013



Source: BERL Regional Database, 2013

Interestingly, the table shows that the fastest growing sectors over the past ten years were Business services and Construction, both of which lost employment in 2013. The Social services and Arts and recreation services have also performed relatively strongly over the longer term. Employment growth from 2003 to 2013 was positive for all sectors, except Manufacturing.

Business Services sector

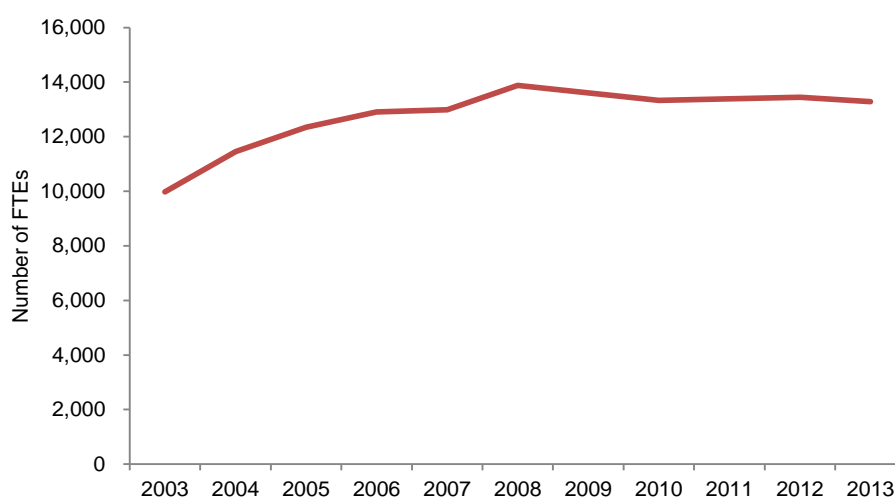
The Business services sector is the third largest of the main sectors in Otago⁸. In 2013, the sector employed more than 13,000 FTEs, or about 14 percent of the FTEs in the region, in about 9,850 business units. The top three Business service industries in terms of employment are:

- Professional, scientific and technical services (4,243 FTEs)
- Administrative services (2,891 FTEs) and
- Property operators and real estate services (953 FTEs).

The property operators and real estate services industry was also the fastest growing industry within the sector between 2012 and 2013 (see table 8.5 for more detailed information on individual industries).

Figure 2.8 shows the change in Business services employment from 2003 to 2013. Employment in the sector peaked in 2008, before falling slightly in 2009 and 2010, but has been broadly stable since then.

Figure 2.8 Employment trend in the Business Services sector, Otago Region, 2003 - 2013



Source: BERL Regional Database, 2013

Manufacturing sector

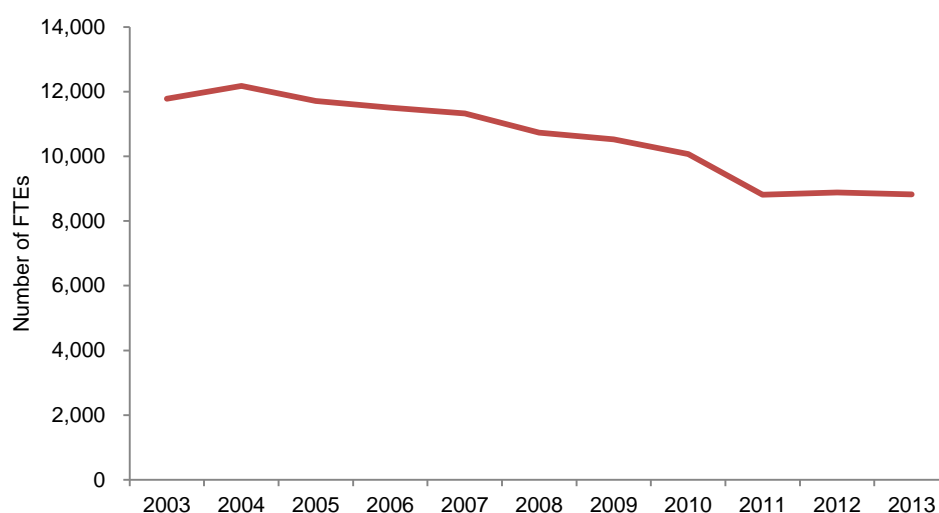
The Manufacturing sector has had setbacks in terms of both GDP and employment over the past 10 years.

⁸ This sector includes a wide range of industries, from utilities such as water and gas, to communication services, finance and insurance, property services, and other business services such as research, architectural, computer, legal, accounting, and cleaning services.

The sector's overall performance in these indicators relies largely on food product manufacturing activities such as Primary product processing (i.e. Meat processing, Milk, and Cream Processing) and Confectionary manufacturing. Since 2005, employment in Food product manufacturing in the region has eased because of scaling back and closures.

Figure 2.9 shows the change in employment in the Manufacturing sector in the Otago Region from 2003 to 2013. The trend was steadily downwards from 2004 until 2011, but it has more-or-less stabilised since then.

Figure 2.9 Employment trend in the Manufacturing sector, Otago Region, 2003-2013



Source: BERL Regional Database, 2013

In 2013, the sector had 8,820 FTEs, of which 867 were in the Fabricated metal product industry, 704 in the Wood product industry and 651 in the Machinery and equipment manufacturing industry.

Overall, employment in the sector fell by 0.7 percent in 2013, and by 2.9 percent per annum between 2003 and 2013.

Again, more industry by industry details can be found in section 8.5.

Retail Trade and Services sector

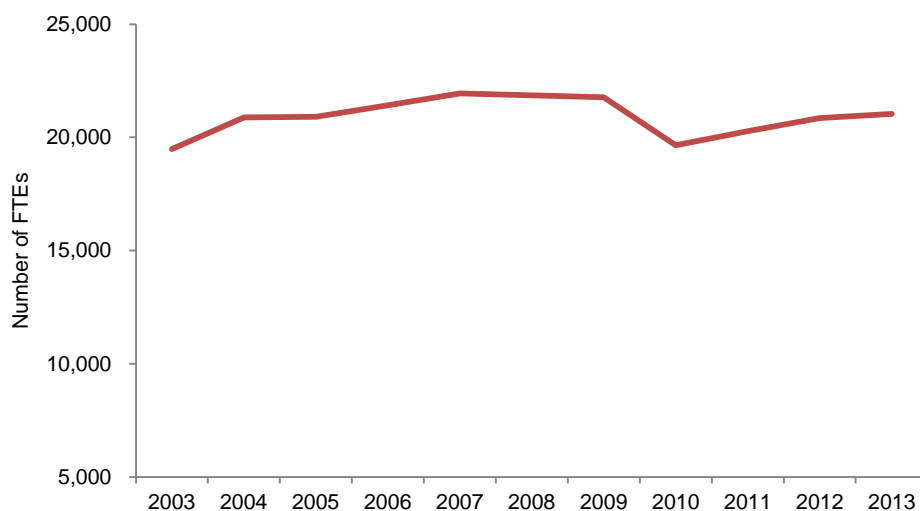
The Retail trade and services sector had just over 21,000 FTEs in 2013. Employment in the sector grew by 0.9 percent between 2012 and 2013, and by 0.8 percent per annum between 2003 and 2013.

Figure 2.10 shows that regional employment in Retail trade and services increased significantly in the early 2000s. Employment fell sharply after the global financial crisis in 2008, before showing steady recovery after 2010.

Within the sector, the largest industries in terms of employment are (see table 8.5):

- Food and beverage services (5,295 FTEs)
- Other store-based retailing (4,799 FTEs) and
- Accommodation (3,736 FTEs).

Figure 2.10 Employment trend in the Retail Trade and Services sector, Otago Region, 2003 to 2013



Source: BERL Regional Database, 2013

Some of the industries had consistent employment gains over the past 10 years. The industries with the greatest employment growth since 2003 are as follows:

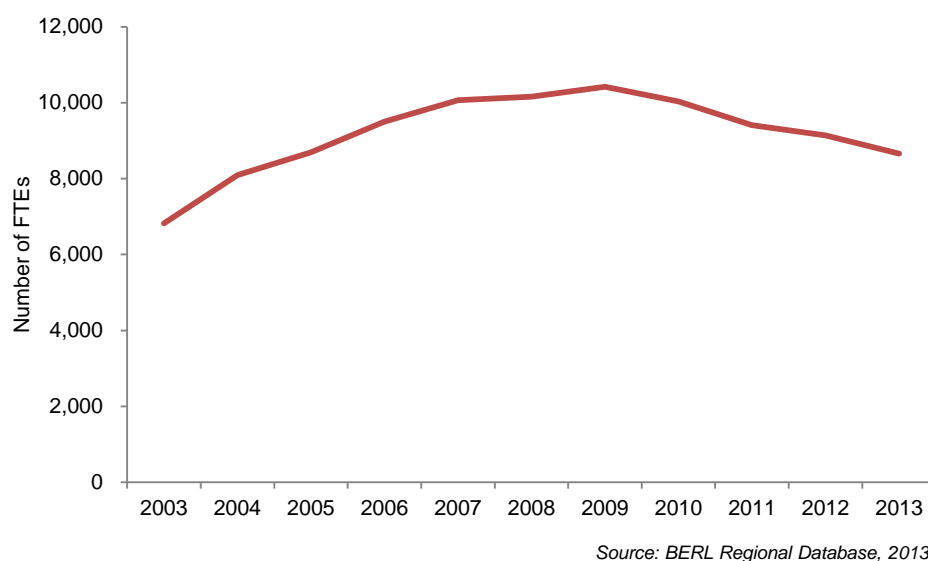
- Food and beverage services (3.5 percent)
- Accommodation (1.9 percent)
- Personal and other services (1.7 percent).

Conversely, employment in Fuel retailing fell by 3.7 percent per annum during the same period.

Construction sector

As Figure 2.11 shows, employment in the Construction sector in Otago was climbing rapidly between 2003 and 2009. However, it has been in steady decline since then. Nonetheless, employment in the sector was still 27 percent higher in 2013 than it was in 2003. The sector was hit hard by the effects of the global financial crisis and, in common with most other regions throughout the country, demand for building consents has remained low.

Figure 2.11 Employment trend in the Construction sector, Otago Region, 2003-2013

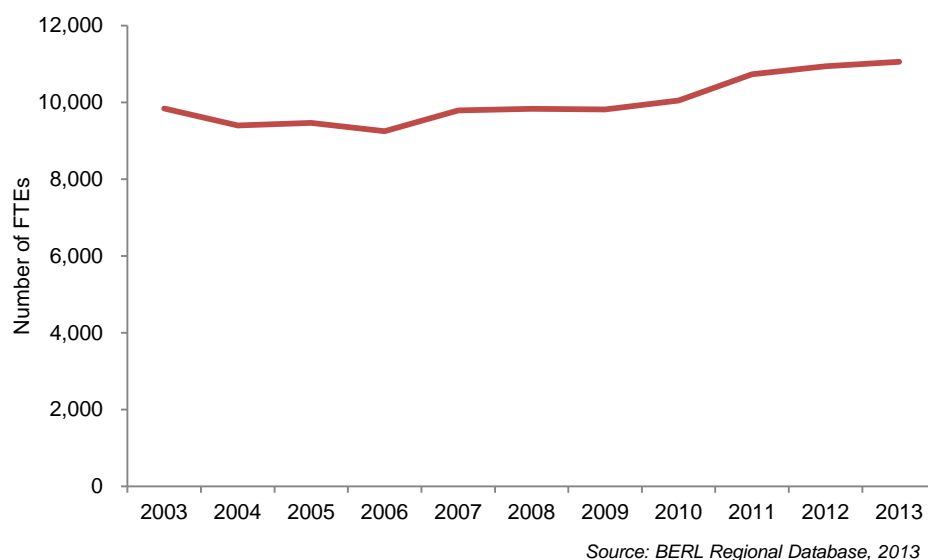


Primary sector

The Primary sector accounts for nearly 12 percent of the region's employment.

Employment in the sector was in decline between 2003 and 2006, but has grown strongly since then as Figure 2.12 shows. Between 2003 and 2013, employment grew by 1.2 percent per annum.

Figure 2.12 Employment trend in the Primary sector, Otago Region, 2003-2013



The largest employers in the Primary sector are:

- Agriculture (8,091 FTEs)
- Agriculture, forestry and fishing support services (1,938 FTEs) and
- Metal ore mining (545 FTEs).

Discounting Aquaculture employment, which grew from an extremely low base of just 6 FTEs in 2003, Metal ore mining was also the fastest growing industry within the Primary sector, averaging 7.7 percent per annum employment growth between 2003 and 2013.

2.4 GDP - Otago Region

This section looks at GDP for the Otago Region. It shows GDP for the region broken down by sector and compares the region's performance to New Zealand.

2.4.1 2013 economic performance

As Table 2.5 shows, GDP in the Otago Region grew by 2.4 percent in the year to March 2013, while national GDP grew by 2.7 percent. Between 2003 and 2013, Otago's GDP grew by 1.7 percent per annum, while the national economy grew by 2.1 percent per annum.

The Otago Region's GDP in 2013 is estimated to be \$9.24 billion, up from \$9.03 billion in 2012. The Otago Region's economy was 2.4 percent bigger in 2013 than a year earlier.

Table 2.5 GDP summary, Otago Region, 2003-2013

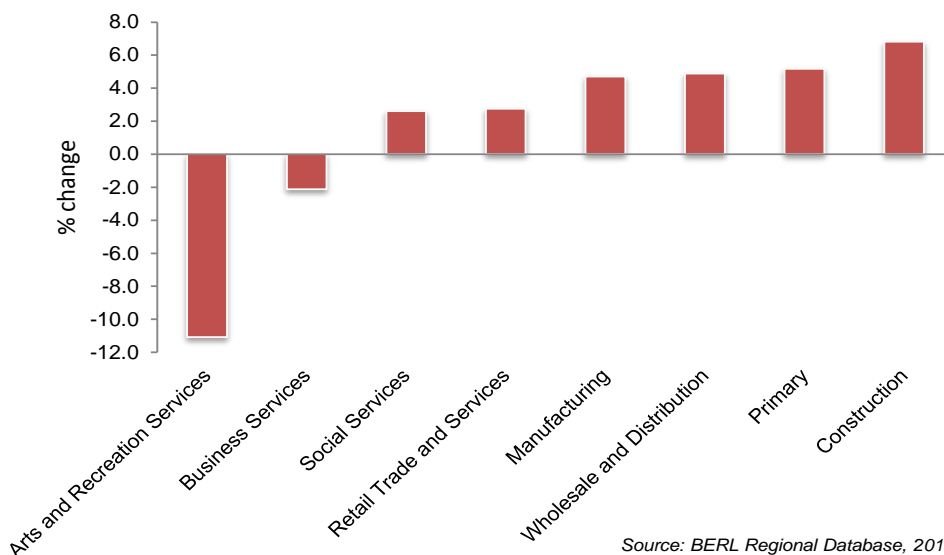
Sector	Value Added or GDP (2013\$m)				%pa change		
	2003	2011	2012	2013	2012	2013	2003 to 2013
Primary	824	841	1,027	1,081	22.2	5.2	2.7
Manufacturing	1,397	1,099	1,124	1,177	2.3	4.7	-1.7
Construction	469	605	543	580	-10.3	6.8	2.1
Wholesale and Distribution	720	840	864	906	2.8	4.9	2.3
Retail Trade and Services	816	1,017	1,073	1,102	5.5	2.8	3.0
Business Services	1,175	1,458	1,488	1,456	2.0	-2.1	2.2
Arts and Recreation Services	137	169	171	152	0.7	-11.1	1.0
Social Services	1,170	1,477	1,447	1,485	-2.0	2.6	2.4
<i>Owner-Occupied Dwellings (O.O.D)</i>	1,094	1,284	1,289	1,301	0.4	0.9	1.7
Otago Region	7,802	8,791	9,025	9,239	2.7	2.4	1.7
New Zealand	171,495	202,272	206,148	211,639	1.9	2.7	2.1

Source: BERL Regional Database, 2013

The fastest growing sectors in Otago in 2013 were Construction (which declined in terms of employment see Table 2.3) and the Primary industries. The Manufacturing and Wholesale and distribution sectors also made sizeable GDP gains. GDP in the Business services declined by 2.1 percent, while GDP in the small Arts and recreation services sector fell by 11.1 percent in 2013.

Figure 2.13 shows the change in GDP in the year to March 2013 by sector in the Otago Region.

Figure 2.13 GDP growth by sector, Otago Region, 2013



Source: BERL Regional Database, 2013

Table 2.6 shows the top ten industries in the Otago Region by GDP. These industries account for 45.7 percent of GDP in the region. Estimates of GDP in all 86 industries can be found in section 8.5.

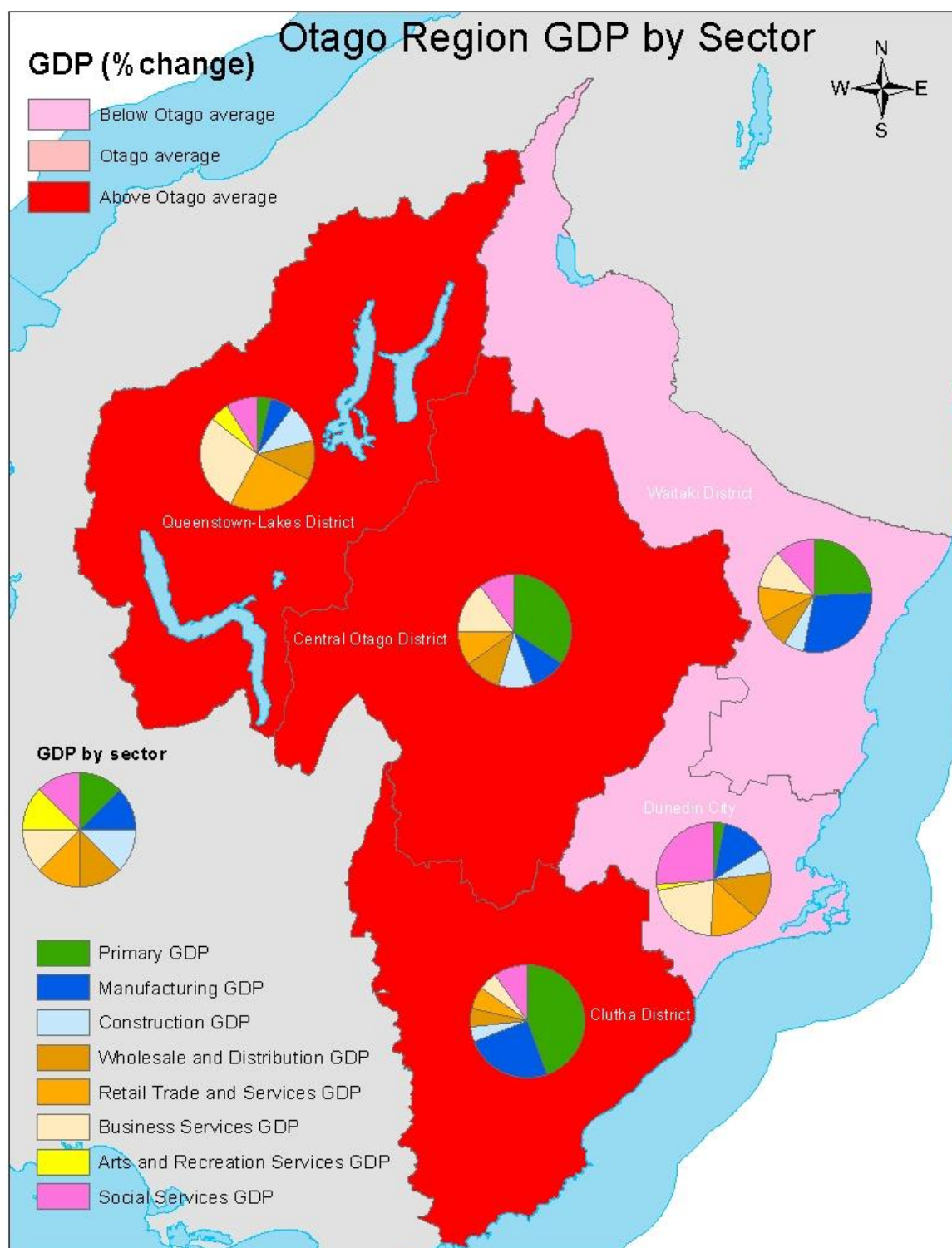
Table 2.6 Ten largest industries by GDP, Otago Region, 2013

Rank by GDP size	Industry	GDP (2013\$m)	
		2013	% of total
1	Agriculture	807	10.2
2	Food Product Manufacturing	565	7.1
3	Professional Scientific and Technical Services (exc Comp Sys Dsn & related)	397	5.0
4	Other Store-Based Retailing	352	4.4
5	Hospitals	291	3.7
6	Construction Services	286	3.6
7	Road Transport	260	3.3
8	Food Retailing	239	3.0
9	Tertiary Education	222	2.8
10	Preschool and School Education	210	2.6

Source: BERL, Statistics NZ

The largest shares of GDP in both Central Otago and Clutha Districts are in the Primary sector, as Figure 2.14 shows. Dunedin is most dependent on Social services for its GDP, while Queenstown Lakes District is most dependent on the Retail trade and services sector and Waitaki on Manufacturing.

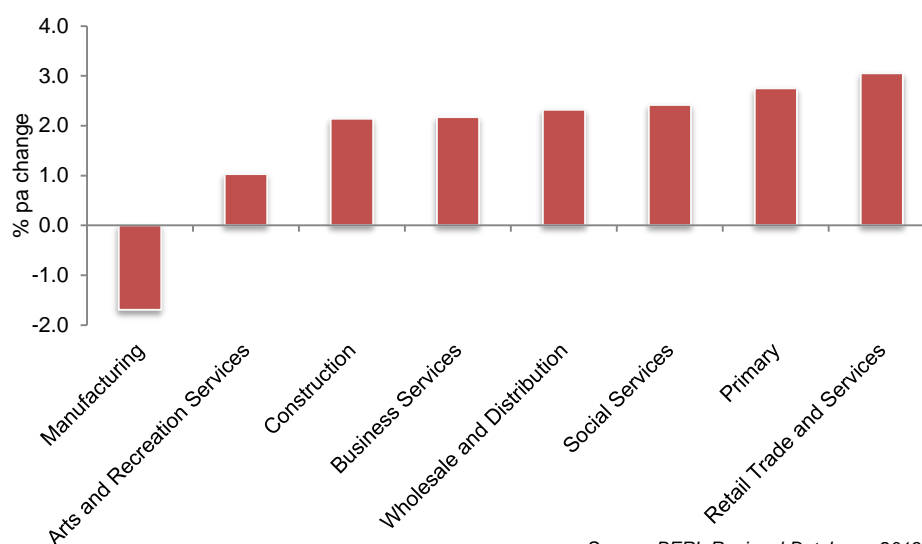
Figure 2.14 GDP by industry, Otago Region, 2013



2.4.2 10-year horizon economic performance

Figure 2.15 shows the average annual GDP growth of the eight standard sectors over the last ten years. During this period, GDP in the Retail trade and services sector grew most rapidly, while GDP in Manufacturing fell.

Figure 2.15 GDP growth by sector, Otago Region, 2003-2013

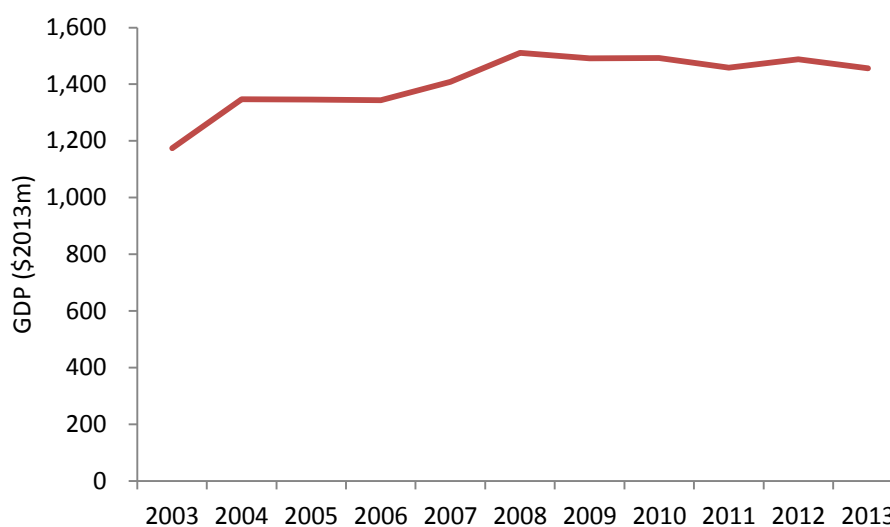


Source: BERL Regional Database, 2013

Business Services sector

The Business services sector's GDP was valued at about \$1.46 billion in 2013, accounting for just less than 16 percent of the Otago Regional economy. From 2003 to 2013, the sector averaged per annum GDP growth of 2.2 percent, despite GDP in the sector falling during 2013. The longer term growth path of GDP in the sector is shown in Figure 2.16.

Figure 2.16 Business Services sector GDP, Otago Region, 2003-2013



Source: BERL Regional Database, 2013

GDP in the sector was growing from 2003 until 2008, but it has been more-or-less static since then.

The business services industries with the highest GDP growth over the past 10 years were:

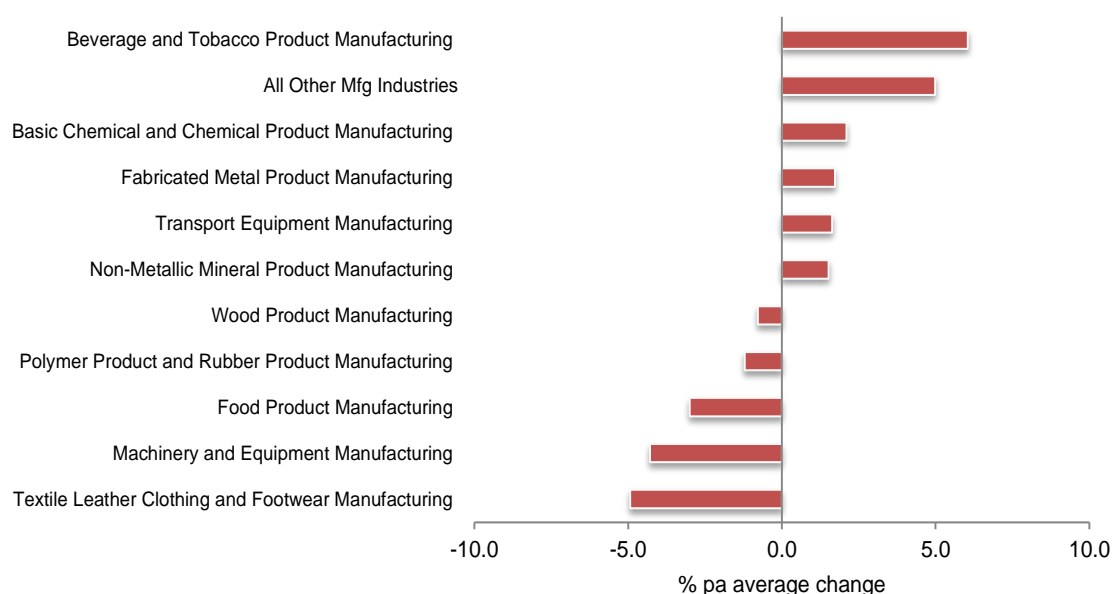
- Gas supply (up 18.4 percent per annum)
- Rental and hiring services (up 7.8 percent per annum) and
- Computer system design and related services (up 7.1 percent per annum).

Manufacturing sector

Despite 4.7 percent growth in GDP in 2013 and 2.3 percent growth in 2012, GDP in the Manufacturing sector fell by 1.7 percent per annum between 2003 and 2013.

Different industries within Manufacturing enjoyed differing fortunes during that period, as Figure 2.17 shows. The chart shows average annual GDP growth of the ten largest manufacturing industries in Otago with the remaining five smaller industries in this sector grouped under 'All other manufacturing').

Figure 2.17 GDP growth in the Manufacturing sector, Otago Region, 2003-2013



Source: BERL Regional Database, 2013

Beverages and tobacco product manufacturing GDP grew by 6.1 percent per annum between 2003 and 2013, while GDP in the 'All other manufacturing' group grew by 5.0 percent per annum. By contrast, GDP in the Textile, leather, clothing and footwear industry fell by 4.9 percent per annum, while GDP in Machinery and equipment manufacturing fell by 4.3 percent per annum.

Overall, the Food product manufacturing industry was the largest in the region's manufacturing sector, with GDP of \$565 million in 2013. This industry accounted for almost half of the sector's total GDP.

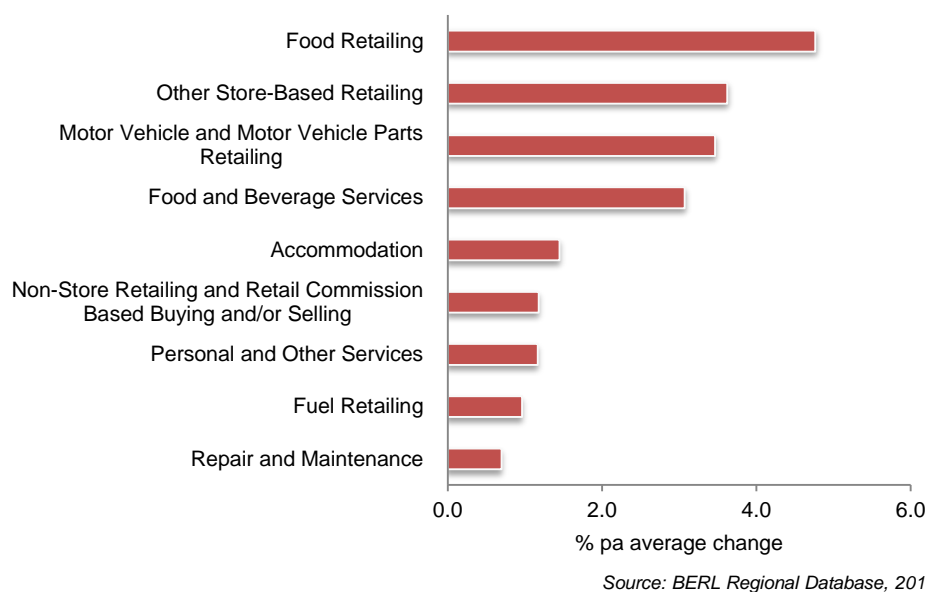
Retail Trade and Services sector

The Retail trade and services sector has over 4,200 business units, providing 21,000 FTE jobs employment for close to 25,000 people, and adding \$1.1 billion to regional GDP in 2013.

Relative to other sectors, the Retail trade and services sector is more affected by the local economy and consumer confidence levels, as well as the volatility of the flow of visitors to the region.

Figure 2.18 summarises the movements in GDP in the sector in Otago during the past decade. The ten year growth rates in GDP were positive for all industries within the sector, but GDP grew fastest in Food retailing.

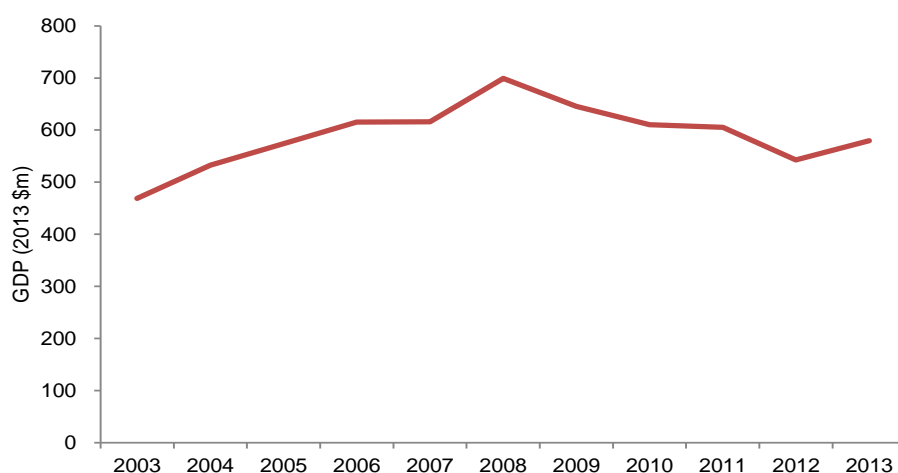
Figure 2.18 GDP growth in the Retail Trade and Services sector, Otago Region, 2003-2013



Construction sector

The Construction sector contributed \$580 million to the Otago region's GDP in 2013. As Figure 2.19 shows, the sector's GDP peaked in 2008, before falling steadily until 2012. GDP in the sector picked up in 2013, although employment in the sector was still trending downwards (see Figure 2.11).

Taking the period 2003- 2013 as a whole, the sector's GDP grew by 2.1 percent per annum. Within this, GDP in the Construction services industry grew by 2.7 percent per annum, GDP in the Building construction industry grew by 2.2 percent per annum and GDP in the Heavy and civil engineering construction industry grew by 1.0 percent per annum.

Figure 2.19 GDP in the Construction sector, Otago Region, 2003-2013

Source: BERL Regional Database, 2013

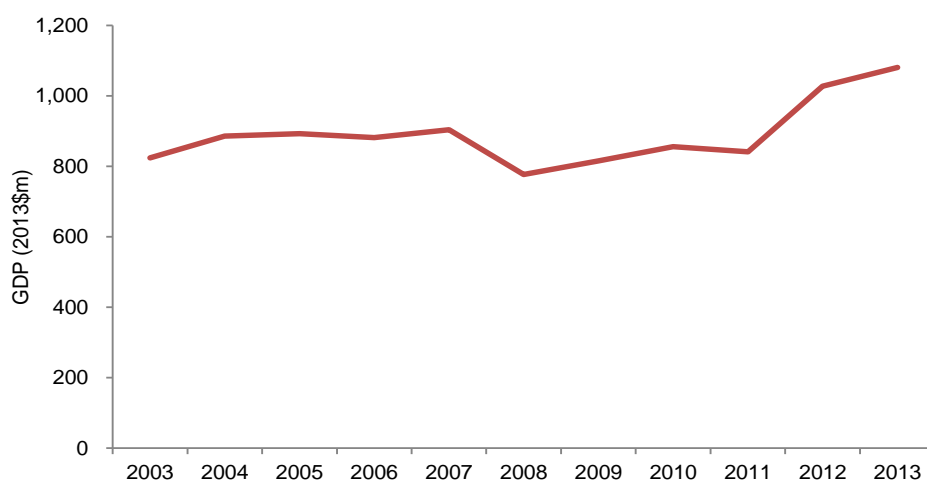
Primary sector

The Primary sector accounts for almost 12 percent of the region's employment. The sector also accounts for almost 12 percent of the region's GDP.

GDP in the sector in 2013 was \$1.1 billion, up by 5.2 percent from the 2012 level. During the period between 2003 and 2013, the sector sustained GDP growth of 2.7 percent per annum, a rate exceeded only by the region's Retail trade and services sector.

In 2013, the largest contributors to the sectors GDP total were the Agriculture industry (with GDP of \$807 million), Forestry and logging (\$111 million) and Agriculture, forestry and fishing support services (\$105 million). During the past decade, Agricultural GDP has grown by 4.3 percent per annum.

Figure 2.20 shows the solid GDP performance of the Primary sector over the past 10 years.

Figure 2.20 GDP in the Primary sector, Otago Region, 2003-2013

Source: BERL Regional Database, 2013

2.5 Labour productivity – Otago Region

Table 2.7 shows labour productivity across the eight sectors in the Otago Region between 2003 and 2013.

Table 2.7 Labour productivity summary, Otago Region, 2003 to 2013⁹

Sector	Productivity (2013\$ per FTE)				%pa change		
	2003	2011	2012	2013	2012	2013	2003 to 2013
Primary	83,738	78,411	93,948	97,737	19.8	4.0	1.6
Manufacturing	118,542	124,778	126,605	133,464	1.5	5.4	1.2
Construction	68,739	64,332	59,378	66,955	-7.7	12.8	-0.3
Wholesale and Distribution	121,210	132,226	131,102	132,729	-0.8	1.2	0.9
Retail Trade and Services	41,893	50,157	51,445	52,405	2.6	1.9	2.3
Business Services #	117,767	108,929	110,710	109,625	1.6	-1.0	-0.7
Arts and Recreation Services	77,517	69,780	66,889	69,144	-4.1	3.4	-1.1
Social Services	65,442	65,478	65,046	65,581	-0.7	0.8	0.0
Otago Region	80,342	79,911	81,751	83,994	2.3	2.7	0.4
New Zealand	91,705	94,457	95,459	98,029	1.1	2.7	0.7

excl owner-occupied dwellings sector

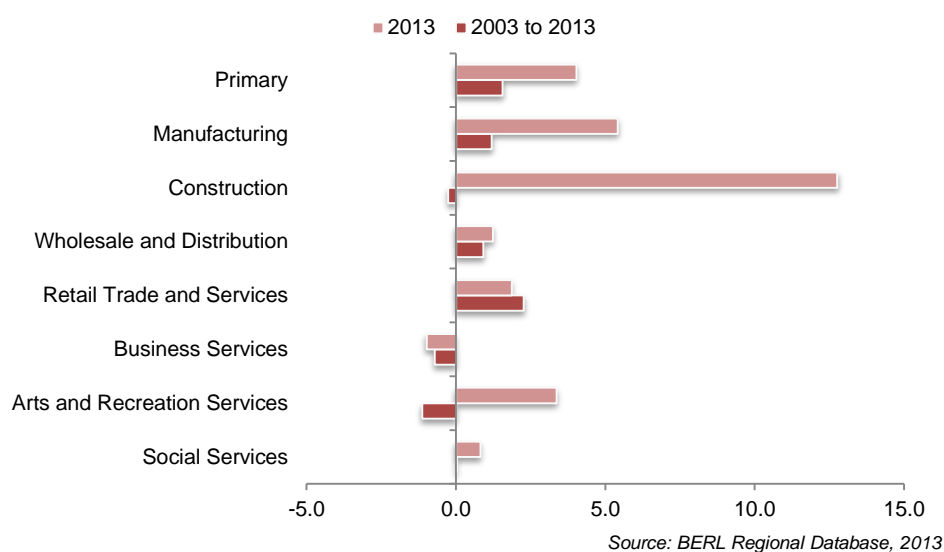
Source: BERL Regional Database, 2013

The Otago region has an overall labour productivity (i.e. GDP per FTE) of \$83,994. This level is about 86 percent of the national level in 2013. Productivity in the region grew at the same rate as it did nationally in 2013, but it grew at significantly below the national rate during the period 2003 to 2013.

In 2013, productivity was highest in Manufacturing (\$133,464 per FTE) and lowest in the Retail trade and services sector (\$52,405 per FTE). Productivity in the former was two-and-a-half times the productivity in the latter.

Figure 2.21 shows that GDP per FTE increased in all but one sector in 2013. However, it grew in only four sectors between 2003 and 2013.

⁹ The Business Services industry group includes the Property Services industry, which in turn includes the sub-industry Ownership of Owner-Occupied Dwellings. By definition, this sub-industry is included in the GDP figures to reflect the rental value of owner-occupied property, which is an imputed value. However, this industry does not employ people. This process would bias labour productivity, especially in the property services industry and business services industry group. To avoid such bias, ownership of owner-occupied dwellings is excluded from all calculations of labour productivity.

Figure 2.21 Change in labour productivity, Otago Region, 2013 and 2003-2013

2.6 Business Units and size – Otago Region

2.6.1 Business Units

Table 2.8 shows the number of business units in the Otago Region, broken down by sector. The number of business units grew faster in Otago than nationally, both during 2013 and between 2003 and 2013.

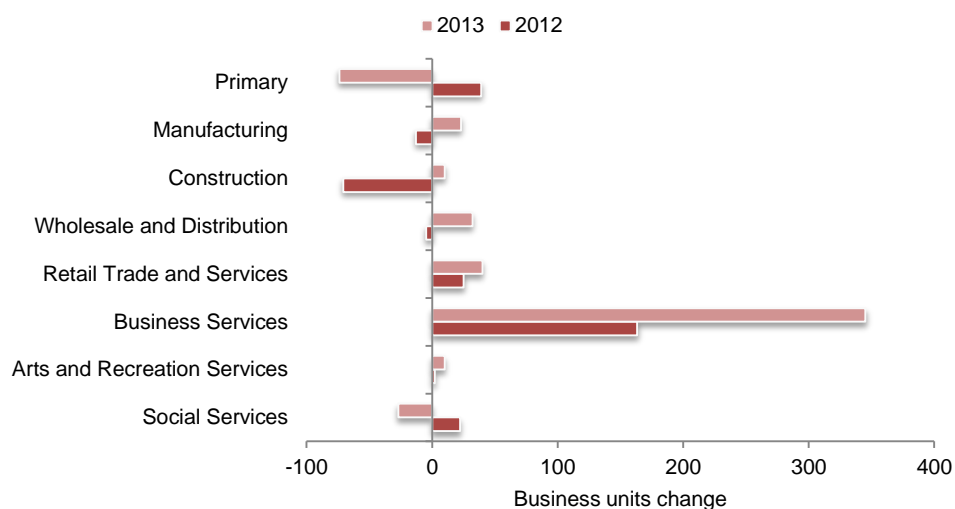
Table 2.8 Business Units summary, Otago Region, 2003 to 2013

Sector	Business Units (number)				%pa change		
	2003	2011	2012	2013	2012	2013	2003 to 2013
Primary	5,212	4,769	4,808	4,734	0.8	-1.5	-1.0
Manufacturing	875	921	908	931	-1.4	2.5	0.6
Construction	1,923	2,843	2,772	2,782	-2.5	0.4	3.8
Wholesale and Distribution	1,464	1,497	1,492	1,524	-0.3	2.1	0.4
Retail Trade and Services	3,639	4,140	4,165	4,205	0.6	1.0	1.5
Business Services	5,779	9,342	9,505	9,850	1.7	3.6	5.5
Arts and Recreation Services	563	663	665	675	0.3	1.5	1.8
Social Services	1,508	1,777	1,799	1,772	1.2	-1.5	1.6
Otago Region	20,963	25,952	26,114	26,473	0.6	1.4	2.4
New Zealand	425,589	505,194	504,381	507,908	-0.2	0.7	1.8

Source: BERL Regional Database, 2013

Figure 2.22 shows the changes in the number of business units by sector in the Otago Region between 2012 and 2013. The number of units grew both in 2012 and in 2013 in three of the eight sectors. In absolute terms, the greatest growth was in the Business services sector.

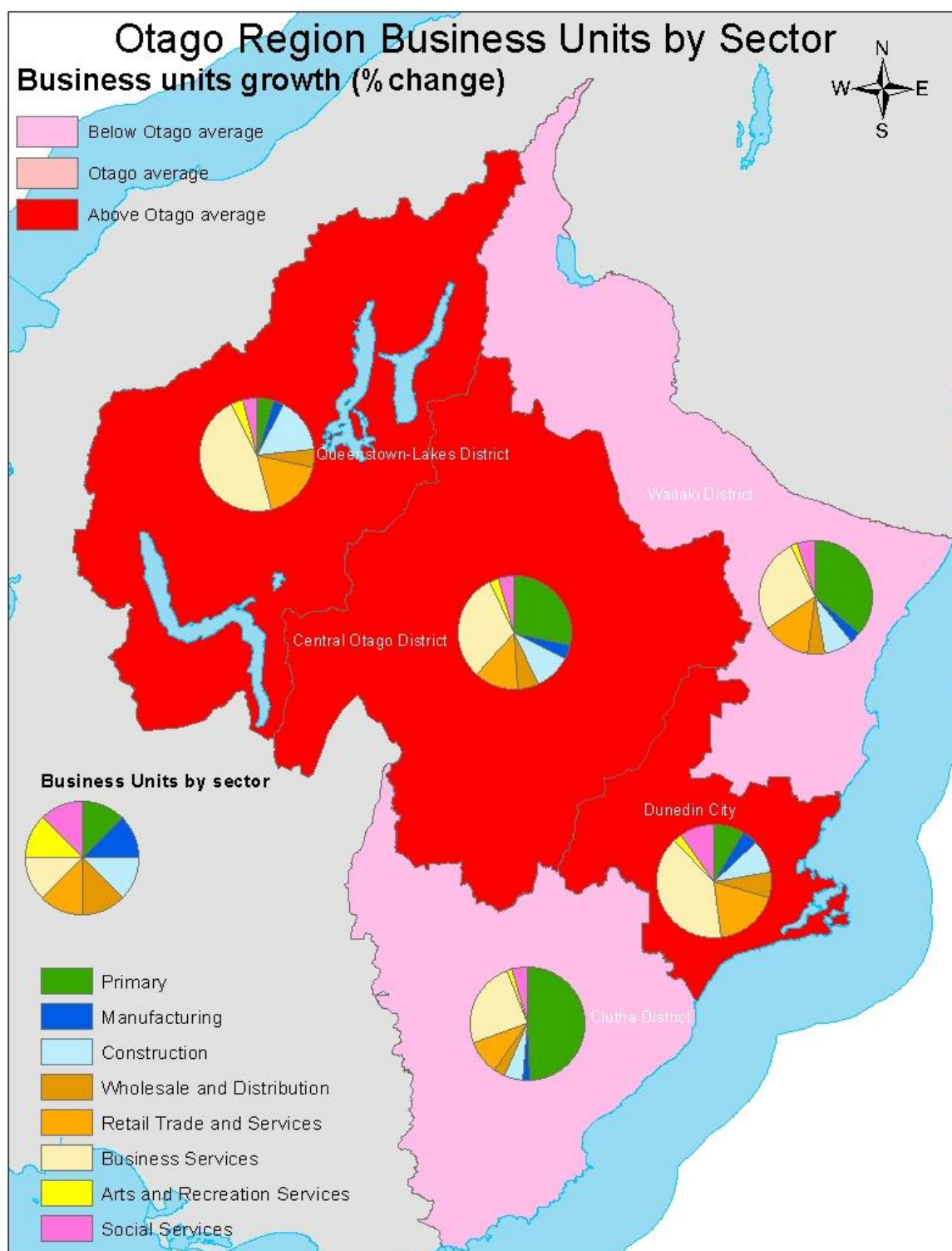
Figure 2.22 Business unit change, Otago Region, 2012 and 2013



Source: BERL Regional Database, 2013

Figure 2.23 illustrates the diversity of the five district economies in terms of the sectoral distribution of business units. For example, almost half of the business units in Clutha District are in the Primary sector, whilst almost half the business units in Queenstown Lakes District are in the Business services. The other three districts have more diversified economies, based on this measure.

Figure 2.23 Business units by sector, Otago Region, 2013



2.6.2 Business size

Table 2.9 reveals that, both in Otago and in New Zealand as a whole, the average business unit is very small in terms of the number of FTEs. It also reveals that business unit size has been declining over the longer term, both regionally and nationally. Primary, Wholesale and Social services had the biggest increase in FTEs per business unit, while the number of FTEs per business unit declined in Manufacturing, Construction and Business services.

Table 2.9 Business size summary, Otago Region, 2003 to 2013

Sector	Business Size (FTEs per unit)				%pa change		
	2003	2011	2012	2013	2012	2013	2003 to 2013
Primary	1.9	2.2	2.3	2.3	1.1	2.7	2.2
Manufacturing	13.5	9.6	9.8	9.5	2.2	-3.1	-3.5
Construction	3.5	3.3	3.3	3.1	-0.4	-5.6	-1.3
Wholesale and Distribution	4.1	4.2	4.4	4.5	4.0	1.4	1.0
Retail Trade and Services	5.4	4.9	5.0	5.0	2.2	-0.1	-0.7
Business Services	1.7	1.4	1.4	1.3	-1.3	-4.6	-2.4
Arts and Recreation Services	3.1	3.7	3.8	3.3	4.7	-15.3	0.4
Social Services	11.9	12.7	12.4	12.8	-2.6	3.3	0.8
Otago Region	4.0	3.6	3.6	3.6	0.1	-1.5	-1.1
New Zealand	3.8	3.7	3.7	3.7	1.1	-0.5	-0.3

Source: BERL Regional Database, 2013

The table also shows that the only sector in Otago with more than ten FTEs per business unit is Social services.

2.7 Location Quotients – Otago Region

Location quotients show the extent to which a region or district is specialised, relative to the country as a whole, in particular industries. They are the ratio of an industry's share of total employment in the region or district to the same industry's share of total employment nationally. Location quotients can range from zero (where a region or district is completely unspecialised in an industry, i.e. has no employment in that industry) to greater than one (i.e. where a particular industry has a greater share of a region's or district's employment than it has nationally). The larger the location quotient, the greater the degree of specialisation.

Location quotients of greater than one for any particular industry can be interpreted as showing that the region or district has a comparative advantage in that industry. However, it is generally necessary to undertake further analysis to determine whether a particular industry with a high location quotient has strategic significance. It could be, for example, that the industry in question is a dying industry that happens for historical reasons to be concentrated in a region or district.

Table 2.10 shows the 10 industries in Otago with the highest location quotients. Metal ore mining has a location quotient of 7.63, implying that workers in the Otago Region are almost eight times more likely than workers nationally to be employed in the industry. Four other industries have location quotients greater than 2.0.

Table 2.10 Ten industries with the highest FTE location quotients, Otago Region, 2013

Rank by FTE location quotient	Industry	Location Quotient
1	Metal Ore Mining	7.630
2	Accommodation	3.078
3	Other Transport	2.926
4	Tertiary Education	2.334
5	Publishing (except Internet and Music Publishing)	2.050
6	Gambling Activities	1.719
7	Heritage Activities	1.706
8	Agriculture Forestry and Fishing Support Services	1.669
9	Primary	1.542
10	Agriculture	1.535

Source: BERL Regional Database, 2013

Table 2.11 shows the 10 industries with the lowest location quotients in the Otago Region. Three industries have no presence in the region, while a fourth, Defence, is virtually absent.

Table 2.11 Ten industries with the lowest location quotients, Otago Region, 2013

Rank by FTE location quotient	Industry	Location Quotient
94	Oil and Gas Extraction	0.000
93	Private Households Employing Staff	0.000
92	Internet Publishing and Broadcasting	0.000
91	Defence	0.032
90	Telecommunications Services	0.101
89	Pulp Paper and Converted Paper Product Manufacturing	0.126
88	Insurance and Superannuation Funds	0.131
87	Internet Service Providers Web Search Portals and Data Processing Services	0.140
86	Coal Mining	0.150
85	Water Transport	0.164

Source: BERL Regional Database, 2013

2.8 Key Sectors

This section examines the recent and longer-term contribution to employment, GDP and Business Units in six sectors that are regarded as key to the Otago Region economy. One of the key sectors (Primary production) is the same as one of the eight sectors examined in previous sections of this report. Four of the others are components of larger sectors examined previously. The remaining key sector, Tourism, is a composite based on parts of different sectors. Tourism is key to the region, but it is not clearly defined as a separate activity in the ANZSIC06.

The key sectors, excluding tourism, accounted for 30 percent of total employment in the region in 2013 and 41 percent when tourism is included, as Table 2.12 shows. Primary production and Education and research, the two largest key sectors, accounted for around 20 percent of total employment in the region in 2013.

Table 2.12 Key sectors, Employment summary, Otago Region, 2003 - 2013

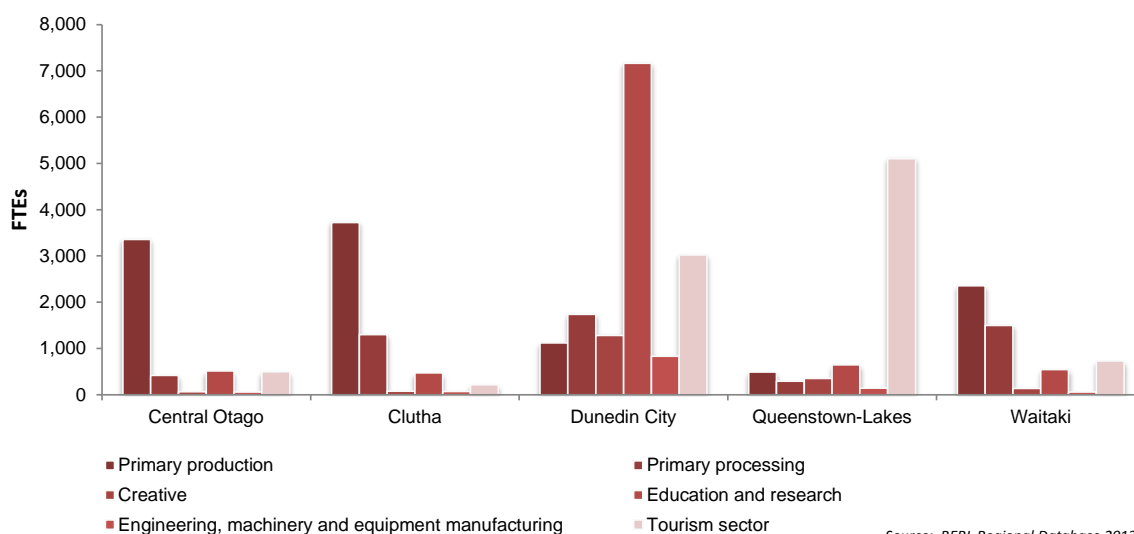
Key sectors employment (FTEs)					%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Primary production	9,838	10,727	10,937	11,056	1.1	1.2
Primary processing	7,153	5,067	5,289	5,282	-0.1	-3.0
Creative	2,178	2,069	1,994	1,923	-3.6	-1.2
Education and research	7,674	9,370	8,907	9,356	5.0	2.0
Engineering, machinery and equipment manufacturing	910	1,124	1,201	1,168	-2.8	2.5
Key sectors (excluding Tourism)	27,753	28,357	28,327	28,785	1.6	0.4
Non-key sectors	55,734	65,585	66,298	65,715	-0.9	1.7
Total employment: Otago Region	83,487	93,942	94,626	94,501	-0.1	1.2
Tourism sector	5,284	9,014	9,715	9,572	-1.5	6.1

Source: BERL Regional Database 2013

Interestingly, the key sectors excluding Tourism collectively grew more rapidly than total employment in Otago in 2013, but slower than total employment in the period 2003-2013. In contrast, employment in tourism fell in 2013 but grew by 6.2 percent per annum between 2003 and 2013.

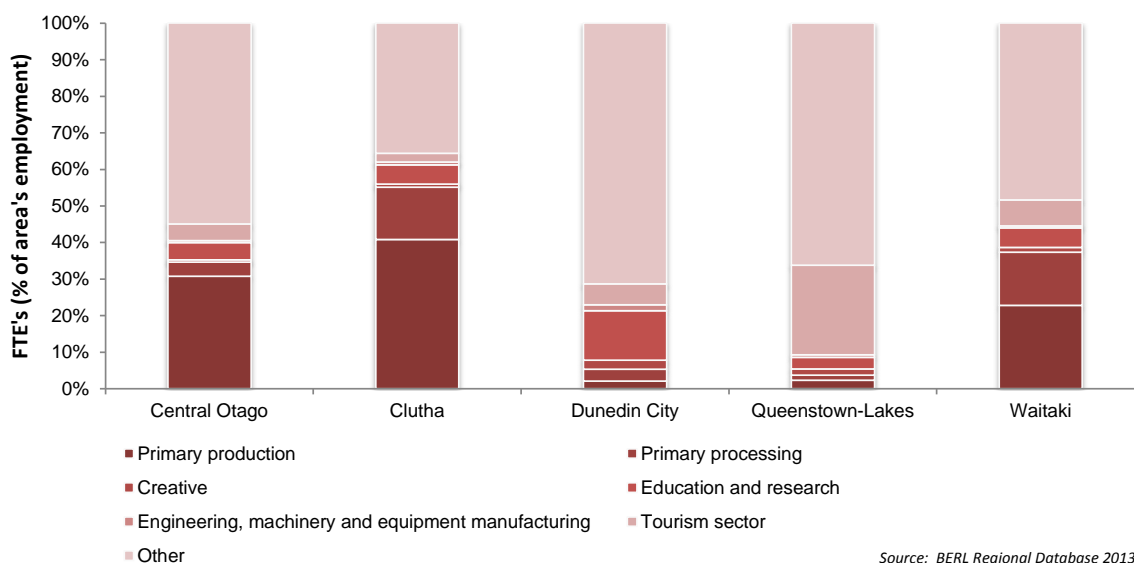
Key sectors vary in importance from district to district, as Figure 2.24 shows. Primary production was, by far, the most important of the key sector in Central Otago and Clutha in 2013. Education and research was, by far the most important to Dunedin city, although Tourism was also important for the city. Queenstown Lakes is very reliant on Tourism and Waitaki is reliant on Primary production and Primary processing.

Figure 2.24 Employment by local authority by key sectors, 2013¹⁰



The relevance of the key sectors within each District is shown in Figure 2.25. This figure includes “Other” employment to put the six key sectors' employment in context of an area's total employment.

Figure 2.25 Percent employment by sector by local authority, 2013



Within Clutha and Waitaki, the key sectors account for over 50 percent of the districts' employment. Key sectors make up the smallest portion of total employment in Dunedin City at around 30 percent, a result of its broader role as the main settlement in the Otago Region.

¹⁰ Dunedin City uses a broader definition of Engineering, machinery and equipment manufacturing than the other territorial authorities (see section 5). However, for the purposes of Figure 2.22, the narrower definition was used for all authorities, including Dunedin.

Table 2.13 shows the recent and longer-term contribution of the six key sectors to regional GDP. This table mirrors the earlier table on the contribution of the key sectors to employment in the region, when Tourism is excluded, the key sectors accounted for 27 percent of GDP in the region and 33 percent when tourism is included. The table also shows that GDP in the key sectors, excluding Tourism, grew faster than GDP in all sectors in 2013, but more slowly during the longer term. Again, the opposite was true for Tourism.

Table 2.13 Key sectors, GDP summary, Otago Region, 2003 - 2013

Key sectors GDP (2013\$m)					%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Primary production	824	841	1,027	1,081	5.2	2.7
Primary processing	937	694	733	745	1.7	-2.3
Creative	79	68	73	71	-2.2	-1.0
Education and research	436	478	460	484	5.2	1.1
Engineering, machinery and equipment manufacturing	85	105	115	112	-2.1	2.8
Key sectors (excluding Tourism)	2,361	2,187	2,408	2,493	3.5	0.5
Non-key sectors	5,441	6,604	6,617	6,745	1.9	2.2
Total GDP: Otago Region	7,802	8,791	9,025	9,239	2.4	1.7
Tourism sector	376	540	574	568	-1.0	4.2

Source: BERL Regional Database 2013

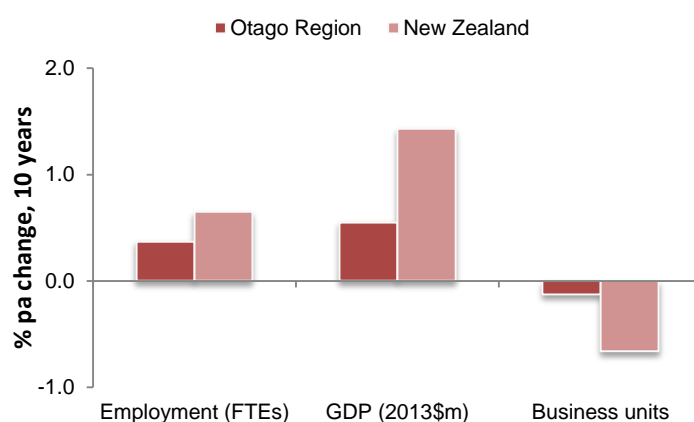
The number of business units in the key sectors, excluding Tourism, declined both in the short term and in the longer term, whereas the number of business units grew in all sectors during both time periods, as Table 2.14 shows. The number of tourism business units grew more slowly than the number in all sectors between 2012 and 2013, but they grew more rapidly over the longer term.

Table 2.14 Key sectors, Business Units summary, Otago Region, 2003 - 2013

Key sectors business units					%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Primary production	5,212	4,769	4,808	4,734	-1.5	-1.0
Primary processing	267	289	293	312	6.5	1.6
Creative	602	767	777	796	2.4	2.8
Education and research	488	560	569	559	-1.8	1.4
Engineering, machinery and equipment manufacturing	259	322	333	341	2.4	2.8
Key sectors (excluding Tourism)	6,828	6,707	6,780	6,742	-0.6	-0.1
Non-key sectors	14,135	19,245	19,334	19,731	2.1	3.4
Total business units: Otago Region	20,963	25,952	26,114	26,473	1.4	2.4
Tourism sector	1,022	1,758	1,834	1,827	-0.4	6.0

Source: BERL Regional Database 2013

Figure 2.26 shows the average annual change in employment, GDP, and Business Units in the five key sectors (excluding the Tourism sector) for Otago and New Zealand since 2003. The key sectors in Otago have underperformed, compared to their counterparts at national level, in terms of both employment and GDP.

Figure 2.26 Key sector indicator growth, Otago Region vs. New Zealand, 2003 - 2013

Source: BERL Regional Database 2013

2.8.1 Tourism sector

Analysis of the Tourism sector identifies activity based on three industry groupings:

- **Tourism characteristic industries** (these include activities such as accommodation, restaurants, transport services, and cultural and recreational services)
- **Tourism related industries** (including such activities as retailing)
- **Non tourism related industries** (which include a variety of activities that benefit from visitor numbers and expenditure).

The contribution to employment, GDP, and business units from tourism activity across these three groupings is calculated using proportions based on national ratios from the Tourism Satellite Account (TSA).

Table 2.15 shows the 2013 contribution of the tourism sector to the Otago Regional economy. The percentage figures show the relative contribution to the Region's economy, except for the last row (New Zealand) which shows the contribution of the tourism sector to the national economy.

Table 2.15 Tourism Key Indicators, Otago Region, 2013

Role of tourism in local economy	Employment	%	GDP (\$2013m)	%	Number of Business Units	%
Tourism-characteristic industries	7,338	7.8%	372	4.0%	1,263	13.7%
Tourism-related industries	1,308	1.4%	96	1.0%	251	0.9%
All non-tourism-related industries	926	1.0%	100	1.1%	313	1.2%
Otago Region	9,572	10.1%	568	6.1%	1,827	6.9%
New Zealand	100,251	5.3%	7696	3.6%	20,376	4.0%

Source: BERL Regional Database 2013

In 2013, the tourism sector accounts for 10.1 percent of employment, 6.1 percent of GDP and 6.9 percent of business units in the Otago Region. These proportions are all higher than nationally.

Table 2.16 shows the longer term contribution of Tourism to the Otago economy in terms of employment. It indicates that 2013 was a relatively poor year for the sector, but that it has performed strongly over the longer term. Between 2003 and 2013, employment in Tourism grew at five times the rate of employment growth in all sectors of the economy.

Table 2.16 Tourism Employment, Otago Region, 2003 - 2013

Tourism Employment (FTEs)	Years ending March				%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Tourism-characteristic industries	3,923	6,798	7,443	7,338	-1.4	6.5
Tourism-related industries	886	1,299	1,317	1,308	-0.7	4.0
All non-tourism-related industries	475	916	955	926	-3.0	6.9
Tourism Sector	5,284	9,014	9,715	9,572	-1.5	6.1
Total Employment: Otago Region	83,487	93,942	94,606	94,501	-0.1	1.2

Source: BERL Regional Database 2013

Table 2.17 shows that Tourism in Otago also outperformed other sectors combined in terms of GDP growth over the longer term. However, growth in Tourism's GDP was not quite as strong as growth in its employment.

Tourism directly contributes over half a billion dollars to the Otago Region's GDP, or about six percent of the total GDP.

Table 2.17 Tourism GDP, Otago Region, 2003 - 2013

Tourism GDP (2013\$m)	Years ending March				%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Tourism-characteristic industries	254	354	383	372	-3.1	3.9
Tourism-related industries	53	87	94	96	1.9	6.0
All non-tourism-related industries	68	99	96	100	4.1	4.0
Tourism Sector	376	540	574	568	-1.0	4.2
Total GDP: Otago Region	7,802	8,791	9,025	9,239	2.4	1.7

Source: BERL Regional Database 2013

Table 2.18 shows the recent and longer-term contribution of Tourism to the number of Business Units in the Otago Region economy. Again, it indicates that 2013 was a relatively poor year for the sector, but that it has performed strongly over the longer term.

Table 2.18 Tourism Business Units, Otago Region, 2003 - 2013

Tourism Business units	Years ending March				%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Tourism-characteristic industries	743	1,207	1,267	1,263	-0.3	5.4
Tourism-related industries	130	250	254	251	-1.3	6.8
All non-tourism-related industries	149	300	313	313	0.1	7.7
Tourism Sector	1,022	1,758	1,834	1,827	-0.4	6.0
Total Business Units: Otago Region	20,963	25,952	26,114	26,473	1.4	2.4

Source: BERL Regional Database 2013

Figure 2.27 shows the change in employment, GDP, and Business Units in the Tourism sector for Otago and New Zealand since 2003. Over the last ten years, the Tourism sector in the Otago Region has enjoyed higher growth than the national average for all three indicators. As shown later in this report, this growth has been led by the Queenstown-Lakes District and Dunedin City.

Figure 2.27 Tourism sector key indicator growth, Otago Region vs. New Zealand, 2003 - 2013

Source: BERL Regional Database 2013

2.8.2 Primary Production sector

Table 2.19 shows the recent and longer-term contribution of Primary production employment to Otago's economy. It indicates that the sector outperformed the Otago economy as a whole in 2013 on this measure, and that it has maintained the same performance as the Otago economy as a whole over the longer term.

Table 2.19 Primary Production sector Employment, Otago Region, 2003 - 2013

Primary production sector Employment (FTEs)	Year Ending March				%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Agriculture	7,578	7,982	8,177	8,091	-1.1	0.7
Aquaculture	6	10	10	10	-0.4	5.0
Services to Agriculture; Hunting and Trapping	1,562	1,766	1,803	1,986	10.1	2.4
Forestry and Logging	264	258	245	213	-13.2	-2.1
Mining and services to mining	428	711	701	756	7.9	5.8
Primary production sector	9,838	10,727	10,937	11,056	1.1	1.2
Total employment: Otago Region	83,487	93,942	94,626	94,501	-0.1	1.2

Source: BERL Regional Database 2013

The sector generated 11,056 FTE jobs in 2013 or almost 12 percent of employment in the region. Agriculture, the largest component of the sector, accounts for 8.6 percent of all employment in the region, but it has been growing relatively slowly over the longer term.

Primary production has grown rapidly in terms of its GDP, both in the short term and in the longer term. Its share of the region's GDP in 2013 was 11.7 percent, up from 10.6 percent in 2003.

Whereas the Agriculture component of the sector has been growing relatively slowly in terms of employment, it has been growing relatively rapidly in terms of GDP, reflecting rapid productivity growth.

Table 2.20 Primary Production sector GDP, Otago Region, 2003 - 2013

Primary production sector GDP (2013\$m)	Year ending March				%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Agriculture	528	557	750	807	7.5	4.3
Aquaculture	0	1	1	1	-11.3	2.0
Services to Agriculture; Hunting and Trapping	112	96	110	108	-1.9	-0.4
Forestry and Logging	90	126	120	111	-7.0	2.1
Mining and services to mining	93	61	47	54	14.9	-5.2
Primary production sector	824	841	1,027	1,081	5.2	2.7
Total GDP: Otago Region	7,802	8,791	9,025	9,239	2.4	1.7

Source: BERL Regional Database 2013

While the number of business units in the economy as a whole has been increasing, the number of units in the primary production sector has been declining, as Table 2.21 shows. This is particularly the case in Agriculture, suggesting a trend towards farm amalgamations.

Table 2.21 Primary Production sector Business Units, Otago Region, 2003 - 2013

Primary production sector Business units	Year ending March				%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Agriculture	4,262	3,847	3,867	3,785	-2.1	-1.2
Aquaculture	5	6	8	7	-12.5	3.4
Services to Agriculture; Hunting and Trapping	520	499	523	537	2.7	0.3
Forestry and Logging	388	372	361	348	-3.6	-1.1
Mining and services to mining	37	45	49	57	16.3	4.4
Primary production sector	5,212	4,769	4,808	4,734	-1.5	-1.0
Total business units: Otago Region	20,963	25,952	26,114	26,473	1.4	2.4

Source: BERL Regional Database 2013

Figure 2.28 shows that the Primary sector in Otago has outperformed the sector at national level in terms of both employment and GDP growth over the longer term.

Figure 2.28 Primary Production sector key indicator growth, Otago Region vs. New Zealand, 2003 - 2013



Source: BERL Regional Database 2013

2.8.3 Primary Processing sector

The Primary processing sector has experienced the same short term decline in employment that the rest of the region's economy experienced, as Table 2.22 shows.

However, while employment rose overall in the ten years to 2013, the Primary processing sector has experienced significant longer-term employment decline.

The sector's share of total employment in the region was 5.6 percent in 2013, down from 8.6 percent in 2003.

The Food, beverage and tobacco industry accounted for 86 percent of the sector's employment in 2003 and in 2013.

Table 2.22 Primary Processing sector Employment, Otago Region, 2003 - 2013

Primary processing sector Employment (FTEs)	Year ending March				%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Food, Beverage and Tobacco	6,132	4,300	4,517	4,552	0.8	-2.9
Wood and Paper Product Manufacturing	1,020	767	771	730	-5.3	-3.3
Primary processing sector	7,153	5,067	5,289	5,282	-0.1	-3.0
Total employment: Otago Region	83,487	93,942	94,626	94,501	-0.1	1.2

Source: BERL Regional Database 2013

Table 2.23, which presents data on the recent and longer-term contribution of the Primary processing sector to Otago GDP, suggests the sector is in longer term decline. In 2013, the sector's GDP was only 80 percent of what it was in 2003.

Table 2.23 Primary Processing sector GDP, Otago Region, 2003 - 2013

Primary processing sector GDP (2013\$m)	Year ending March				%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Food, Beverage and Tobacco	797	565	599	621	3.8	-2.5
Wood and Paper Product Manufacturing	140	129	134	124	-7.6	-1.2
Primary processing sector	937	694	733	745	1.7	-2.3
Total GDP: Otago Region	7,802	8,791	9,025	9,239	2.4	1.7

Source: BERL Regional Database 2013

By contrast with the two previous tables, Table 2.24 presents a positive picture of the sector's recent and longer-term contribution of Primary processing sector's business units to the Otago economy. When combined with the decline in GDP over the longer term, the increase in the number of business units might be indicating the Food and beverage industry is changing towards a more craft-based pattern of activity and away from industrial production.

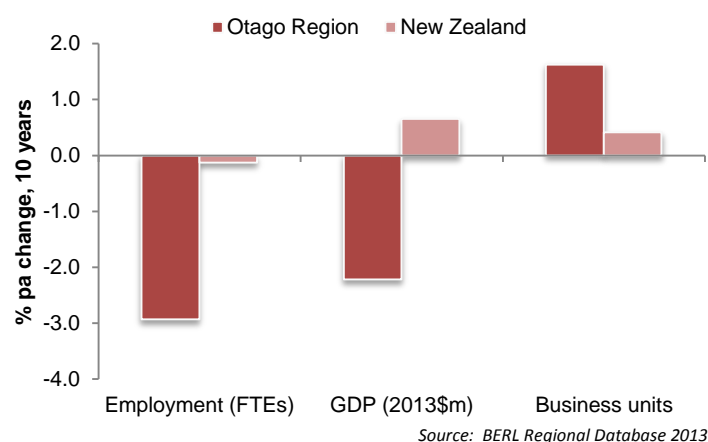
Table 2.24 Primary Processing sector Business Units, Otago Region, 2003 - 2013

Primary processing sector Business units	Year ending March				%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Food, Beverage and Tobacco	154	177	182	198	8.8	2.5
Wood and Paper Product Manufacturing	113	112	111	114	2.7	0.1
Primary processing sector	267	289	293	312	6.5	1.6
Total business units: Otago Region	20,963	25,952	26,114	26,473	1.4	2.4

Source: BERL Regional Database 2013

Figure 2.29 shows the change in employment, GDP and business units in the Primary Processing sector in the Otago Region and at a national level since 2003. Primary processing in Otago has under-performed in terms of both employment and GDP, relative to the sector in New Zealand as a whole.

Figure 2.29 Primary Processing sector key indicator growth, Otago Region vs. New Zealand, 2003 - 2013



2.8.4 Creative sector

The Creative sector in Otago is similar to the Primary processing sector, in terms of its performance relative to the rest of the region's economy.

Table 2.25 shows the recent and longer-term contribution of Creative sector employment to the Otago's economy, and reveals both short-term and longer-term decline. The sector's employment fell by almost 12 percent between 2003 and 2013, and its share of total employment in the region fell from 2.6 percent in 2003 to 2.0 percent in 2013.

The largest industry in the sector is printing and publishing, and this sector has suffered more rapid loss of employment than the rest of the sector.

The only industry within the sector to have increased its employment in the longer-term has been Commercial services. Between 2003 and 2013, employment in this industry increased by 55 percent.

Table 2.25 Creative sector Employment, Otago Region, 2003 - 2013

Creative sector Employment (FTEs)	Year ending March				%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Printing and publishing	1,266	1,193	1,071	1,028	-4.0	-2.1
Arts and antiques market	113	63	64	65	1.5	-5.4
Commercial services	242	348	356	374	4.9	4.5
Film, video and television services	348	325	340	315	-7.4	-1.0
Music, creative and performing arts and venues	209	140	163	141	-13.3	-3.8
Creative sector	2,178	2,069	1,994	1,923	-3.6	-1.2
Total employment: Otago Region	83,487	93,942	94,626	94,501	-0.1	1.2

Source: BERL Regional Database 2013

As Table 2.26 reveals, GDP in the creative sector has changed in broadly in line with employment. There has been both short-term and longer-term decline, and the sector has performed worse than the rest of the Otago economy on this measure.

The only industry within the sector that has grown over the longer-term is Commercial services.

Table 2.26 Creative sector GDP, Otago Region, 2003 – 2013

Creative sector GDP (2013\$ m)	Year ending March				%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Printing and publishing	19	17	15	15	5.0	-2.0
Arts and antiques market	5	4	4	5	8.6	-0.9
Commercial services	12	15	17	19	8.7	4.3
Film, video and television services	27	22	24	22	-10.8	-2.1
Music, creative and performing arts and venues	16	10	12	11	-13.0	-4.1
Creative sector	79	68	73	71	-2.2	-1.0
Total GDP: Otago Region	7,802	8,791	9,025	9,239	2.4	1.7

Source: BERL Regional Database 2013

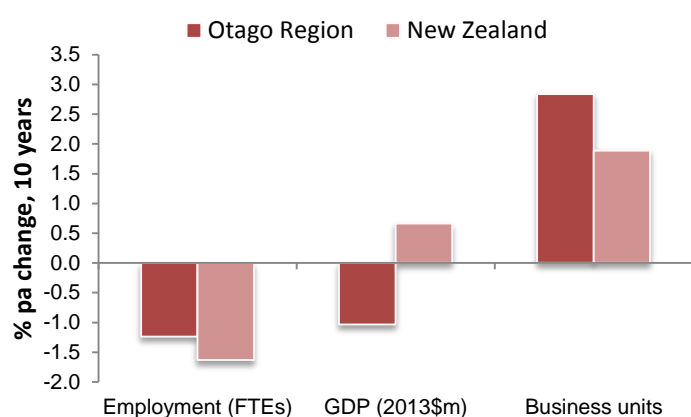
Table 2.27 shows the recent and longer-term contribution of business units in the Creative sector to the Otago Region economy, highlighting the number of business units has experienced sustained growth over the period.

Table 2.27 Creative sector Business Units, Otago Region, 2003 - 2013

Creative sector Business units	Year ending March				%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Printing and publishing	67	89	91	94	3.3	3.4
Arts and antiques market	74	53	65	67	3.1	-1.0
Commercial services	204	291	301	313	4.0	4.4
Film, video and television services	105	136	128	127	-0.8	1.9
Music, creative and performing arts and venues	152	198	192	195	1.6	2.5
Creative sector	602	767	777	796	2.4	2.8
Total business units: Otago Region	20,963	25,952	26,114	26,473	1.4	2.4

Source: BERL Regional Database 2013

The creative sector in Otago has suffered slightly slower employment loss than the sector at national level during the past ten years, as Figure 2.30 shows. However, its GDP has declined, whereas the sector's GDP has grown in the country as a whole.

Figure 2.30 Creative sector key indicator growth, Otago Region vs. New Zealand, 2003 - 2013

Source: BERL Regional Database 2013

2.8.5 Education & Research sector

The performance of the Education and research sector in Otago has been broadly on a par with the performance of the rest of the economy in the region. Its performance has also more-or-less matched the performance of the sector elsewhere in New Zealand.

Table 2.28 shows the recent and longer-term contribution of the Education and research sector's employment to the Otago Regional economy. The sector enjoyed a good year in 2013, with 5 percent growth in employment, and it has grown relatively strongly over the longer-term, averaging 2 percent growth per year.

The sector's share of all employment in the region increased from 9.2 percent in 2003, to 9.9 percent in 2013. All parts of the sector, except the relatively small "Other education" industry, have experienced longer-term employment growth.

Table 2.28 Education & Research sector Employment, Otago Region, and 2003 - 2013

Education & Research Sector Employment (FTEs)	Year ending March				%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Preschool Education	394	810	846	860	1.6	8.1
Primary and Secondary Education	3,027	3,195	3,003	3,343	11.3	1.0
Higher Education	3,666	4,517	4,336	4,460	2.9	2.0
Other Education	295	344	304	288	-5.4	-0.3
Scientific Research	293	505	417	405	-2.9	3.3
Education & Research sector	7,674	9,370	8,907	9,356	5.0	2.0
Total employment: Otago Region	83,487	93,942	94,626	94,501	-0.1	1.2

Source: BERL Regional Database 2013

In the public sector, which dominates Education and research, GDP tends to move very closely in line with employment. Consequently, Table 2.29 shows similar trends to the previous table on employment trends.

Table 2.29 Education and Research sector GDP, Otago Region, 2003 - 2013

Education & Research Sector GDP (2013\$m)	Year ending March				%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Preschool Education	22	39	42	43	2.1	7.1
Primary and Secondary Education	166	156	149	167	11.9	0.1
Higher Education	201	220	215	222	3.4	1.0
Other Education	16	17	15	14	-4.9	-1.2
Scientific Research	32	46	39	38	-3.2	1.8
Education & Research sector	436	478	460	484	5.2	1.1
Total GDP: Otago Region	7,802	8,791	9,025	9,239	2.4	1.7

Source: BERL Regional Database 2013

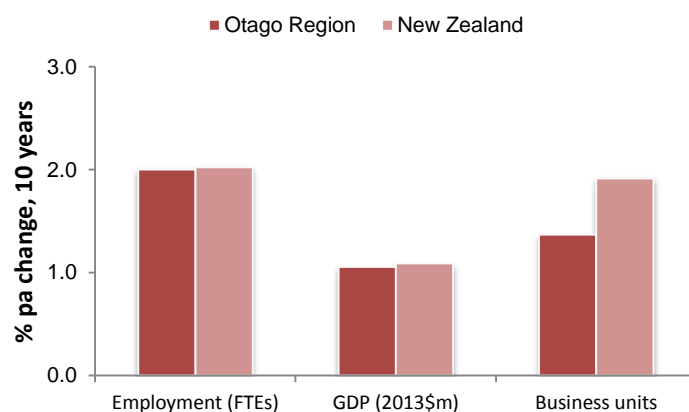
Table 2.30 shows the recent and longer-term contribution of the Education and research sector's business units (or, in the case of this sector, activity units) to the Otago economy. The number of units in the sector fell in 2013, but it has grown over the longer term. Most of the longer-term growth has been in the relatively small Preschool education and Scientific research components of the sector.

Table 2.30 Education and Research sector Business Units, Otago Region, 2003 - 2013

Education & Research Sector Business units	Year ending March				%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Preschool Education	116	137	139	138	-0.7	1.8
Primary and Secondary Education	175	158	157	155	-1.3	-1.2
Higher Education	25	38	47	40	-14.9	4.8
Other Education	100	130	129	127	-1.6	2.4
Scientific Research	72	97	97	99	2.1	3.2
Education & Research sector	488	560	569	559	-1.8	1.4
Total business units: Otago Region	20,963	25,952	26,114	26,473	1.4	2.4

Source: BERL Regional Database 2013

Figure 2.31 shows the change in employment, GDP and business units in the Education and research sector in the Otago Region and nationally since 2003. The pattern of growth in the region was similar to the national pattern, except the increase in business units in the region was slightly slower than nationally.

Figure 2.31 Education and Research sector key indicator growth, Otago Region vs. New Zealand, 2003 - 2013

Source: BERL Regional Database 2013

2.8.6 Engineering, Machinery & Equipment Manufacturing

Table 2.31 shows the recent and longer-term contribution of the Engineering, machinery and equipment manufacturing sector to employment in the Otago Region economy. The sector had a relatively poor year in 2013, but experienced strong employment growth over the longer-term.

Employment in the sector increased by 28 percent between 2003 and 2013, and its share of regional employment increased from 10.9 percent to 12.4 percent during the same period. Most of the longer term growth in employment in the sector came from Consultant engineering services, which almost doubled in size in ten years.

Table 2.31 Engineering, Machinery & Equipment Manufacturing Employment, Otago Region, 2003 - 2013

Engineering, Machinery & Equipment manufacturing sector Employment (FTEs)	Year ending March				%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Machinery and Equipment Manufacturing	613	617	634	607	-4.2	-0.1
Consultant Engineering Services	297	507	567	560	-1.2	6.6
Engineering, Machinery & Equipment manufacturing sector	910	1,124	1,201	1,168	-2.8	2.5
Total Employment: Otago Region	83,487	93,942	94,626	94,501	-0.1	1.2

Source: BERL Regional Database 2013

As Table 2.32 shows, GDP in the sector fell in 2013, but grew strongly over the longer-term. Again, most of the longer-term growth came from the Consultant engineering services industry.

Table 2.32 Engineering, Machinery and Equipment Manufacturing GDP, Otago Region, 2003 - 2013

Engineering, Machinery & Equipment manufacturing sector GDP (2013\$m)	Year ending March				%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Machinery and Equipment Manufacturing	53	59	61	60	-2.5	1.2
Consultant Engineering Services	32	46	53	52	-1.6	5.0
Engineering, Machinery & Equipment manufacturing sector	85	105	115	112	-2.1	2.8
Total GDP: Otago Region	7,802	8,791	9,025	9,239	2.4	1.7

Source: BERL Regional Database 2013

Table 2.33 show the recent and longer-term contribution of Engineering, machinery and equipment manufacturing sector business units to the Otago Regional economy. It indicates that the number of business units in the sector has grown strongly, but almost exclusively in Consultant engineering services

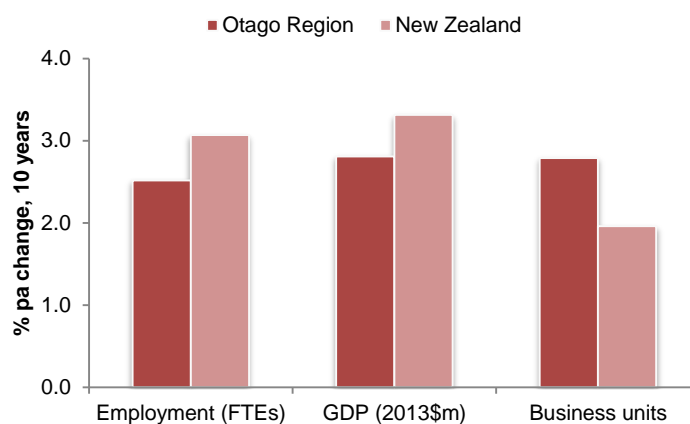
Table 2.33 Engineering, Machinery & Equipment Manufacturing Business Units, Otago Region, 2003 - 2013

Engineering, Machinery & Equipment manufacturing sector Business units	Year ending March				%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Machinery and Equipment Manufacturing	122	121	125	125	0.0	0.2
Consultant Engineering Services	137	201	208	216	3.8	4.7
Engineering, Machinery & Equipment manufacturing sector	259	322	333	341	2.4	2.8
Total Business units: Otago Region	20,963	25,952	26,114	26,473	1.4	2.4

Source: BERL Regional Database 2013

Figure 2.32 shows that, despite its relative strength within the region, the sector has grown slightly slower over the longer-term than its counterpart in the country as a whole, both in terms of employment and GDP. However, the number of business units in the sector in the region has grown faster than the equivalent at national level.

Figure 2.32 Engineering, Machinery & Equipment Manufacturing, Otago vs. New Zealand, 2003 - 2013



Source: BERL Regional Database 2013

2.8.7 Information and communication technology (ICT) sector

Table 2.34 reveals a very strong employment performance for the ICT sector in the region, relative to the performance of the regional economy as a whole. This is true for both the short-term and the longer-term.

The sector's employment grew by 44 percent between 2003 and 2013, and its share of regional employment grew from 0.7 percent to 0.9 percent.

Within the sector, two of the component industries experienced employment decline over the longer-term, while two have experienced growth.

Table 2.34 ICT Employment, Otago Region, 2003 - 2013

ICT sector Employment (FTEs)	Year ending March				%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Manufacturing	58	41	49	43	-11.8	-3.0
Wholesaling	297	308	368	452	23.0	4.3
Telecommunication services	59	83	74	53	-28.9	-1.1
Commercial services	193	299	270	329	22.1	5.5
ICT sector	608	731	761	878	15.4	3.7
Total employment: Otago Region	83,487	93,942	94,626	94,501	-0.1	1.2

Source: BERL Regional Database 2013

Table 2.35 focuses on the recent and longer-term contribution of the ICT sector to regional GDP between 2003 and 2013, and it presents a somewhat different picture to the one on employment in Table 2.34.

GDP in the sector hardly grew in 2013, and it actually declined between 2003 and 2013. Curiously, the table also suggests that GDP in the Commercial services component of the sector declined significantly between 2003 and 2013, whereas the previous table suggested that employment in this part of the sector grew rapidly over the same period.

Table 2.35 ICT GDP, Otago Region, 2003 - 2013

ICT sector GDP (2013\$m)	Year ending March				%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Manufacturing	5	4	5	4	-9.9	-1.3
Wholesaling	33	36	43	54	24.5	4.9
Telecommunication services	59	90	74	57	-22.0	-0.3
Commercial services	73	57	42	49	17.2	-3.9
ICT sector	170	187	163	164	0.7	-0.3
Total GDP: Otago Region	7,802	8,791	9,025	9,239	2.4	1.7

Source: BERL Regional Database 2013

Table 2.36 presents the recent and longer-term contribution of the ICT sector to regional business units between 2003 and 2013. As with the table on employment in the sector, this table suggests very strong short term growth and strong longer-term growth.

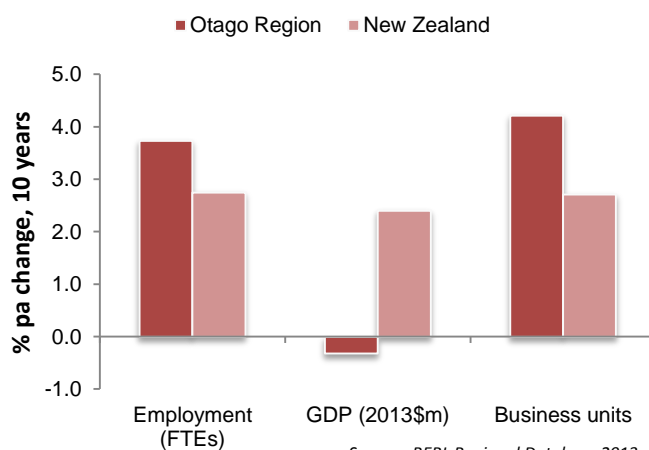
Table 2.36 ICT Business Units, Otago Region, 2003 - 2013

ICT sector Business units	Year ending March				%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Manufacturing	11	7	8	8	0.0	-3.1
Wholesaling	83	74	72	83	15.3	0.0
Telecommunication services	13	12	11	11	0.0	-1.7
Commercial services	114	208	220	232	5.5	7.4
ICT sector	221	301	311	334	7.4	4.2
Total business units: Otago Region	20,963	25,952	26,114	26,473	1.4	2.4

Source: BERL Regional Database 2013

Figure 2.33 suggests that the ICT sector in Otago outperformed its counterpart nationally in terms of employment and business unit growth, but underperformed in terms of GDP.

Figure 2.33 ICT sector key indicator growth, Otago Region vs. New Zealand, 2003 - 2013



Source: BERL Regional Database 2013

3 Central Otago District

3.1 Economy - Central Otago District

Table 3.1 shows the key indicators for the eight standard sectors in the Central Otago District in 2013.

Table 3.1 GDP, employment and business units by sector, Central Otago, 2013

Sectors (2013)	FTEs	%	GDP (2013\$m)	%	Business units	%
Primary	3,361	32.3%	303	34.2%	956	28.6%
Manufacturing	638	6.1%	87	9.9%	135	4.0%
Construction	1,350	13.0%	90	10.2%	354	10.6%
Wholesale and Distribution	686	6.6%	92	10.3%	192	5.7%
Retail Trade and Services	1,549	14.9%	86	9.7%	431	12.9%
Business Services	1,385	13.3%	129	14.6%	1,033	30.9%
Arts and Recreation Services	111	1.1%	8	0.9%	78	2.3%
Social Services	1,338	12.8%	90	10.1%	161	4.8%
Sub-total (excluding O.O.D.)	10,419	100.0%	886	100.0%	3,340	100.0%
Owner-Occupied Dwellings (O.O.D)*			114			
Total	10,419		1,000		3,340	

* Imputed value, included in Total GDP only

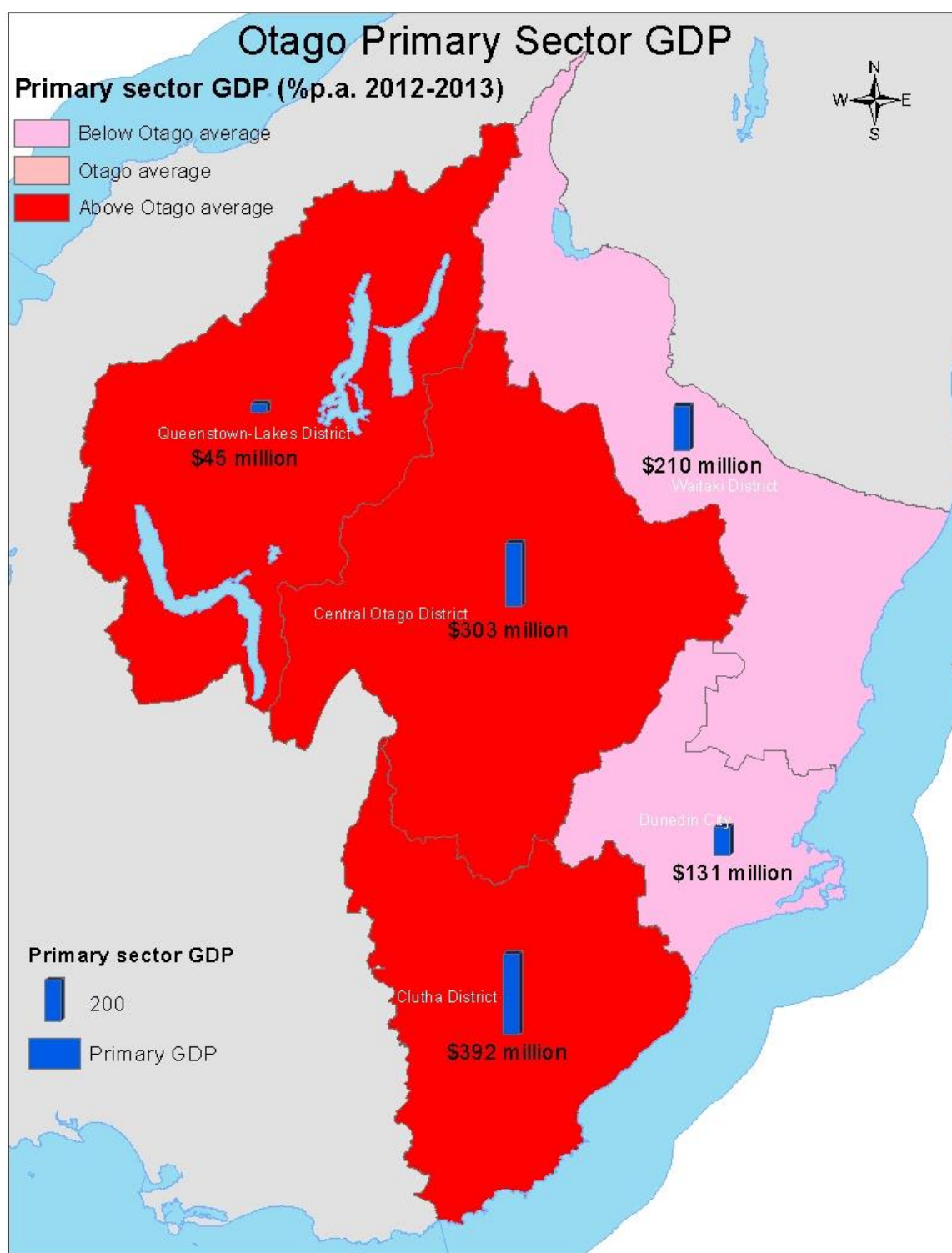
Source: BERL Regional Database, 2013

In 2013, 10,419 FTEs were employed in Central Otago spread across 3,340 businesses units. The Primary sector is the District's largest employer (32.3 percent) and GDP generator (34.2 percent). The Business Services sector had the greatest proportion of business units in the district at 30.9 percent.

Central Otago accounted for 28 percent of Otago's GDP in the primary sector, second only to Clutha.

Primary sector GDP in Central Otago grew more rapidly than the regional average in 2012-2013, as Figure 3.1 shows.

Figure 3.1 Primary sector GDP, Otago Region, 2013¹¹



¹¹ Note: 200 bar refers to a scale of \$200 million

3.2 Economic performance – Central Otago District

Table 3.2 shows the key performance indicators for Central Otago compared to the region and nationally. It presents a picture of a rapidly growing local economy in 2013, with each indicator for Central Otago revealing a better performance for the district than for the region or the country as a whole.

Table 3.2 Key performance indicators, Central Otago, 2013

Key Performance Indicators	%pa for 2013 year		
	Central Otago District	Otago Region	New Zealand
Resident population growth	1.6	0.9	0.8
GDP growth	6.5	2.4	2.7
GDP per capita growth	4.8	1.4	1.8
Employment growth	3.7	-0.1	0.2
Labour productivity growth	3.3	2.7	2.7
Business units growth	1.8	1.4	0.7
Business size growth	1.8	-1.5	-0.5

Source: BERL Regional Database, 2013

Similarly, Table 3.3 indicates that district's economy has out-performed the regional and national economies on every key indicator over the longer-term.

Table 3.3 Key performance indicators, Central Otago District, 2003 to 2013

Key Performance Indicators	%pa for 2003 - 2013		
	Central Otago District	Otago Region	New Zealand
Resident population growth	1.6	0.8	0.9
GDP growth	4.1	1.7	2.1
GDP per capita growth	2.5	0.9	1.2
Employment growth	3.4	1.2	1.5
Labour productivity growth	0.9	0.4	0.7
Business units growth	2.8	2.4	1.8
Business size growth	0.5	-1.1	-0.3

Source: BERL Regional Database, 2013

Section 8.6, at the end of this report, provides a detailed picture of the short-term and longer-term performance of 86 industries within the Central Otago economy, with performance measured in terms of employment, GDP and business units growth.

3.3 Fastest growing industries – Central Otago District¹²

Table 3.4 shows the 10 industries with the fastest growth trends in the Central Otago District by FTE employment in the ten years to March 2013.

Table 3.4 Ten fastest growing industries by FTE growth, Central Otago District, 2003 to 2013

Rank by FTE growth	Industry	Employment (FTEs)		
		2003	2013	%pa growth
1	Administrative Services	111	666	19.6
2	Social Assistance Services	27	111	15.2
3	Beverage and Tobacco Product Manufacturing	82	239	11.3
4	Residential Care Services	73	133	6.2
5	Food and Beverage Services	196	347	5.9
6	Agriculture Forestry and Fishing Support Services	437	774	5.9
7	Road Transport	188	301	4.8
8	Preschool and School Education	271	415	4.4
9	Repair and Maintenance	89	135	4.3
10	Construction Services	299	416	3.4

Source: BERL, Statistics NZ

Employment grew fastest in Administrative services between 2003 and 2013. The industry added 555 FTEs during that period, which is equivalent to growth of almost 20 percent. Employment in the Social assistance services and Beverage and tobacco product manufacturing also experienced double digit annual percentage growth rates.

3.4 Key Sectors – Central Otago District

This section presents data on the recent and longer-term contribution of employment, GDP and business units in key sectors in the Central Otago District. The sectors are the six whose performance at a regional level was examined earlier in this report. The performance of the Horticulture and fruit-growing and Viticulture industries, which are especially important to Central Otago, is also examined.

3.4.1 Horticulture and Fruit-growing

Table 3.5 shows the number of business units and FTEs in the Horticulture and fruit-growing industries in Central Otago from 2003 to 2013.

¹² This ranking covers industries that employ more than 100 FTEs and, for GDP ranking, those industries earning over \$10 million.

Table 3.5 Horticulture and fruit growing industries, Central Otago District, 2003 to 2013**Business units**

Industry	2003	2011	2012	2013	%pa change	
					2012 to 2013	2003 to 2013
Grape Grow ing	86	127	112	106	-5.4	2.1
Kiw ifruit Grow ing	0	0	0	0	na	na
Berry Fruit Grow ing	1	3	4	4	0.0	14.9
Apple and Pear Grow ing	57	17	17	20	17.6	-9.9
Stone Fruit Grow ing	98	91	97	98	1.0	0.0
Citrus Fruit Grow ing	0	0	0	0	na	na
Olive Grow ing	3	3	4	5	25.0	5.2
Other Fruit and Tree Nut Grow ing	15	12	12	13	8.3	-1.4
Total Horticulture and Fruit Growing	260	253	246	246	0.0	-0.6

Full time equivalents

Industry	2003	2011	2012	2013	%pa change	
					2012 to 2013	2003 to 2013
Grape Grow ing	126	414	377	316	-16.3	9.6
Kiw ifruit Grow ing	0	0	0	0	na	na
Berry Fruit Grow ing	3	3	0	3	na	-0.5
Apple and Pear Grow ing	447	53	94	74	-21.2	-16.4
Stone Fruit Grow ing	681	1,107	1,235	1,449	17.3	7.8
Citrus Fruit Grow ing	0	0	0	0	na	na
Olive Grow ing	0	0	0	0	na	na
Other Fruit and Tree Nut Grow ing	0	3	3	0	-100.0	na
Total Horticulture and Fruit Growing	1,258	1,579	1,710	1,841	7.7	3.9

Source: BERL Regional Database 2013

The Horticulture and fruit growing industries in Central Otago have been undergoing significant restructuring over the past decade.

In 2013, employment in the Horticulture and fruit-growing sector increased significantly. This was mainly driven by increased employment in the Stone fruit growing industry, which more than offset decreases in Grape growing and Apple and pear growing.

Overall, employment in this industry group increased by 46 percent between 2003 and 2013. Employment in Stone fruit growing increased by 113 percent, and employment in Grape growing increased by 151 percent. However, employment in Apple and pear growing declined by 83 percent.

The table on the number of business units also shows restructuring of the industries, although the extent of change in terms of this indicator has not been as great as the change in employment. .

3.4.2 Viticulture

As the data above on the number of business units in Grape growing implies, there has been consolidation among grape growers and winemakers in the past two years. Annual production at vineyards in the Central Otago District increased in the year to 2013, but it is still below the peak of 2008. The sector also managed to expand the current number of wineries. Of the 698 wineries in New Zealand, 124 are in Central Otago. The District's wine industry is a major source of export earnings for the regional and national economy and a driver of tourism within the district and region.

Table 3.6 summarises a range of indicators for the Central Otago viticulture sector.

Table 3.6 Wine industry statistics, Central Otago District, 2003 to 2013

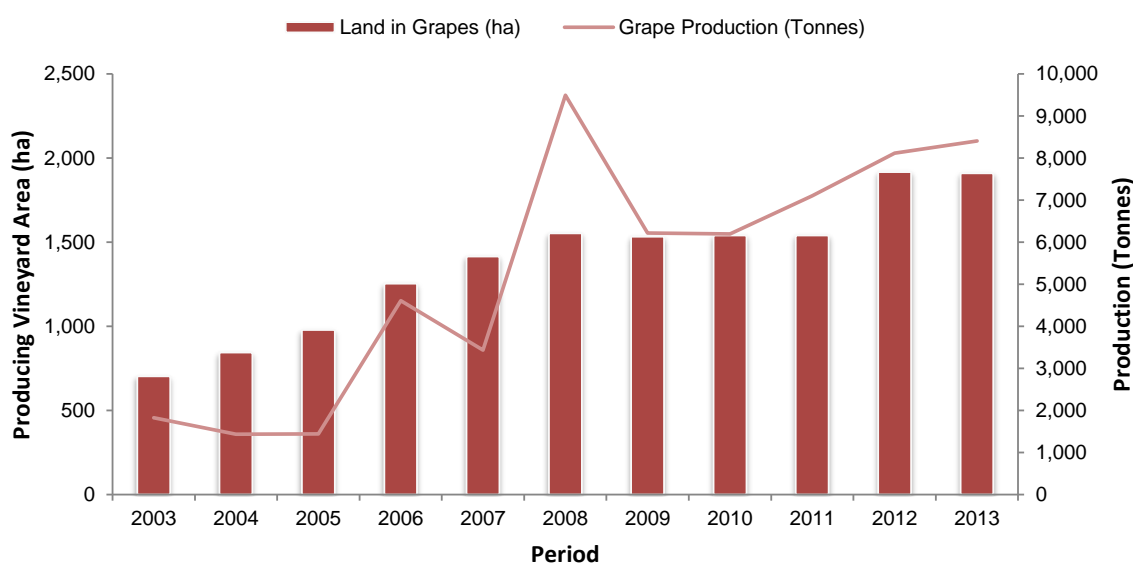
	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Producing Vineyard Area (ha)											
Central Otago	703	844	978	1,253	1,415	1,552	1,532	1,540	1,540	1,917	1,909
Total New Zealand	15,800	18,112	21,002	22,616	25,355	29,310	31,964	33,428	33,400	35,337	35,733
Production (Tonnes)											
Central Otago	1,825	1,439	1,441	4,612	3,434	9,495	6,218	6,196	7,104	8,115	8,407
Total New Zealand	76,400	165,500	142,000	185,000	205,000	285,000	285,000	266,000	328,000	269,000	345,000
Wineries											
Central Otago	52	75	82	82	89	95	103	111	115	120	124
Total New Zealand	421	463	516	530	543	585	643	672	698	703	698
Grape Growers											
Central Otago	42	11	17	50	63	75	77	NI	35	35	NI
Total New Zealand	634	589	818	866	1,003	1,060	1,117	851	791	824	833

*Note NI refers to not identified

Source: New Zealand Winegrowers Annual Vintage Surveys 2013

Figure 3.2 presents some of the data from Table 3.2 in a different format, and it has two salient features; 2008 was a highly unusual year in terms of grape production and, after a pause between 2008 and 2011, there has been a step change in the area planted under vines.

Figure 3.2 Land in grapes and production, Central Otago District, 2003 to 2013



Source: New Zealand Winegrowers Annual Vintage Surveys 2013

Table 3.7 shows the recent pattern of employment in industries directly connected with the wine industry. Notwithstanding the relatively poor year for employment in grape growing in 2013, it indicates that employment related to wine has been growing very rapidly in the District.

Table 3.7 Employment in the wine industry, Central Otago District, 2003 to 2013

Employment (FTEs)	Year ending March				% pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Grape Growing	126	414	377	316	-16.3	9.6
Wine and Other Alcoholic Beverage Manufacturing	82	211	220	239	8.7	11.3
Viciculture sector	208	624	597	555	-7.1	10.3

Source: BERL Regional Database 2013

3.4.3 Tourism sector

Table 3.8 presents the contribution of Tourism to employment, GDP and business units in the Central Otago District in 2013. Central Otago data is compared with New Zealand data.

The table suggests that Tourism is lightly less important to Central Otago than it is to the country as a whole in terms of both employment and GDP, but that it is more important in terms of the number of business units.

Table 3.8 Tourism sector key indicators, Central Otago District, 2013

Role of tourism in local economy	Employment	%	GDP (\$2013m)	%	Number of Business Units	%
Tourism-characteristic industries	301	2.9%	14	1.4%	109	10.9%
Tourism-related industries	92	0.9%	7	0.7%	20	0.6%
All non-tourism-related industries	103	1.0%	11	1.1%	33	1.0%
Central Otago	497	4.8%	31	3.1%	162	4.8%
New Zealand	100,251	5.3%	7696	3.6%	20,376	4.0%

Source: BERL Regional Database 2013

Table 3.9 shows the recent and longer-term contribution of Tourism employment to the Central Otago District. Employment in the sector dipped in the year to March 2013, but it increased strongly over the longer-term. Tourism employment in the district grew more strongly than total employment in the district over the past decade. Employment growth has been strongest in the Tourism-characteristic industries.

Between 2003 and 2013, employment in Tourism in the district increased by 65 percent, and the sector's share of total employment increased from 4.0 percent to 4.8 percent.

Table 3.9 Tourism Employment in Central Otago District, 2003 – 2013

Tourism Employment (FTEs)	Years ending March				%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Tourism-characteristic industries	167	369	305	301	-1.2	6.1
Tourism-related industries	76	123	95	92	-2.8	1.9
All non-tourism-related industries	58	128	106	103	-2.7	6.0
Tourism Sector	301	621	506	497	-1.9	5.1
Total Employment: Central Otago	7,472	9,966	10,049	10,419	3.7	3.4

Source: BERL Regional Database 2013

Table 3.10 focuses on the recent and longer-term contribution of Tourism GDP to the Central Otago District economy. GDP from Tourism in the district grew more slowly than GDP from all sectors, both in the short- and longer-term.

Overall, GDP in Tourism in the district grew by 35 percent between 2003 and 2013, but its share of total GDP in Central Otago fell from 3.4 percent in 2003, to 3.0 percent in 2013.

Table 3.10 Tourism GDP in Central Otago District, 2003 – 2013

Tourism GDP (2013\$m)	Years ending March				%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Tourism-characteristic industries	10	16	14	14	0.6	2.7
Tourism-related industries	5	8	7	7	-0.3	3.9
All non-tourism-related industries	8	12	10	11	4.5	3.4
Tourism Sector	23	36	30	31	1.7	3.2
Total GDP: Central Otago	669	879	939	1,000	6.5	4.1

Source: BERL Regional Database 2013

Table 3.11 presents data on the recent and longer-term contribution of Tourism business units to the Central Otago District economy. The number of business units in the sector decreased in 2013, but grew strongly over the longer-term.

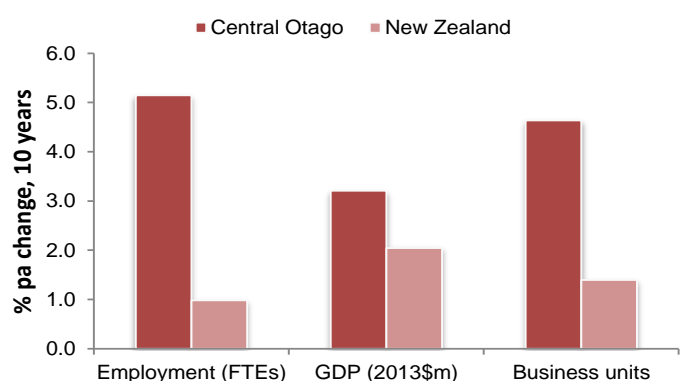
Table 3.11 Tourism Business Units in Central Otago District, 2003 - 2013

Tourism Business units	Years ending March				%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Tourism-characteristic industries	69	130	117	109	-6.8	4.7
Tourism-related industries	14	28	22	20	-9.7	4.0
All non-tourism-related industries	20	41	34	33	-3.2	4.9
Tourism Sector	103	199	173	162	-6.5	4.6
Total Business Units: Central Otago	2,523	3,297	3,280	3,340	1.8	2.8

Source: BERL Regional Database 2013

Figure 3.3 shows changes in employment, GDP and business units in the Tourism sector in the Central Otago District compared to New Zealand over the past ten years. Despite mixed longer-term Tourism performance, relative to the performance of all sectors in the district, the sector has performed better than its counterpart at national level over the longer-term.

Figure 3.3 Tourism sector key indicator growth, Central Otago District vs. New Zealand, 2003 - 2013



Source: BERL Regional Database 2013

3.4.4 Primary Production sector

Table 3.12 shows the recent and longer-term contribution of Primary production employment to the Central Otago District economy. The sector has performed strongly over both time periods. Below sector level, Agriculture had had very good year in 2013, and Services to agriculture grew very rapidly in the short-term and in the longer-term.

Between 2003 and 2013, employment in the sector increased by 48 percent and its share of total employment in Central Otago increased from 30.4 percent to 32.3 percent. During the same period, employment in Agriculture increased by 35.9 percent, and employment in Services to agriculture increased by 79.7 percent.

Table 3.12 Primary Production Employment, Central Otago District, 2003 - 2013

Primary production sector Employment (FTEs)	Year Ending March				%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Agriculture	1,815	2,152	2,320	2,467	6.4	3.1
Aquaculture	0	0	0	0	na	na
Services to Agriculture; Hunting and Trapping	439	775	736	789	7.3	6.0
Forestry and Logging	14	15	18	15	-17.4	0.4
Mining and services to mining	0	37	34	89	165.6	na
Primary production sector	2,268	2,978	3,107	3,361	8.2	4.0
Total employment: Central Otago	7,472	9,966	10,049	10,419	3.7	3.4

Source: BERL Regional Database 2013

Table 3.13 shows the recent and longer-term contribution of Primary production GDP to the Central Otago District economy. 2013 was an extremely good year, and the longer-term performance has also been very strong.

Between 2003 and 2013, GDP in the sector increased by 85.9 percent and its share of total GDP in Central Otago increased from 24.4 percent to 30.3 percent. During the same period, GDP in Agriculture increased by 93.7 percent, and GDP in Services to agriculture increased by 34.4 percent. Forestry and logging GDP also grew strongly over the decade, albeit from a low base.

Table 3.13 Primary Production GDP in Central Otago District, 2003 - 2013

Primary production sector GDP (2013\$m)	Year ending March				%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Agriculture	127	150	213	246	15.6	6.9
Aquaculture	0	0	0	0	na	na
Services to Agriculture; Hunting and Trapping	32	42	45	43	-4.4	3.1
Forestry and Logging	5	7	9	8	-11.5	4.8
Mining and services to mining	0	3	2	6	182.7	na
Primary production sector	163	203	269	303	12.8	6.4
Total GDP: Central Otago	669	879	939	1,000	6.5	4.1

Source: BERL Regional Database 2013

Table 3.14 shows the recent and longer-term contribution of Primary production business units to the Central Otago District economy. Overall, it suggests a pattern of business amalgamations over the longer-term, especially in Agriculture and Forestry and logging.

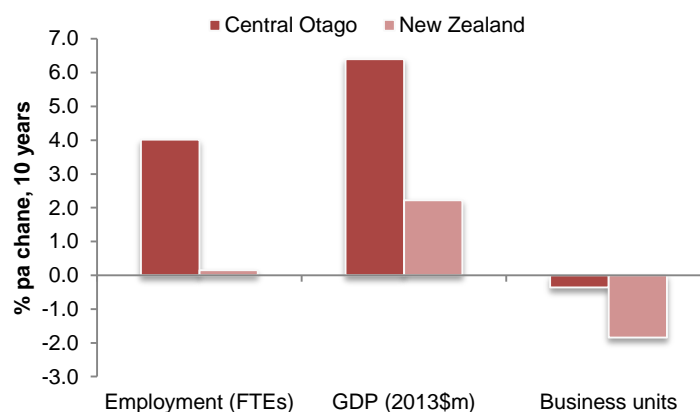
Table 3.14 Primary Production Business Units in Central Otago District, 2003 - 2013

Primary production sector Business units	Year ending March				%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Agriculture	873	824	803	803	0.0	-0.8
Aquaculture	0	0	1	0	-100.0	na
Services to Agriculture; Hunting and Trapping	80	102	108	115	6.5	3.7
Forestry and Logging	30	22	22	24	9.1	-2.2
Mining and services to mining	8	10	10	14	40.0	5.8
Primary production sector	991	958	944	956	1.3	-0.4
Total business units: Central Otago	2,523	3,297	3,280	3,340	1.8	2.8

Source: BERL Regional Database 2013

Figure 3.4 compares the changes in employment, GDP and business units in the Primary production sector in the Central Otago District with the equivalent changes national level since 2003. The sector in Central Otago has performed more strongly than the sector at national level in terms of all three measures.

Figure 3.4 Primary Production sector growth, Central Otago District vs. New Zealand, 2003 - 2013



Source: BERL Regional Database 2013

3.4.5 Primary Processing sector

In 2013, the Primary processing sector employed 419 FTEs in 65 Business Units and generated \$60 million in GDP in Central Otago. The two industries that make up the sector are the Food, beverage and tobacco; and Wood and paper product manufacturing industries. The Food, beverage and tobacco industry is the larger of the two.

Table 3.15 focuses on the recent and longer-term contribution of Primary processing employment to the Central Otago District economy. It shows that employment in the sector jumped in 2013, however the number of Primary production jobs has grown more slowly than jobs in the district as a whole over the longer-term.

Between 2003 and 2013, employment in the sector increased by 12.6 percent, but its share of total employment in Central Otago fell from 5.0 percent to 4.0 percent. During the same period, employment in the Food, beverage and tobacco industry increased by 13.2 percent, and employment in Wood and paper products manufacturing increased by 10.7 percent.

Table 3.15 Primary Processing Employment, Central Otago District, 2003 - 2013

Primary processing sector Employment (FTEs)	Year ending March				%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Food, Beverage and Tobacco	288	283	291	326	12.3	1.3
Wood and Paper Product Manufacturing	84	82	92	93	0.7	1.0
Primary processing sector	372	365	383	419	9.5	1.2
Total employment: Central Otago	7,472	9,966	10,049	10,419	3.7	3.4

Source: BERL Regional Database 2013

Table 3.16 shows the recent and longer-term contribution of the sector's GDP to the Central Otago District economy. It indicates a very good short-term performance, but a weaker longer-term performance. The two industries in the sector both performed well over the longer term, despite a fall in Wood and paper product manufacturing in 2013.

Between 2003 and 2013, GDP in the sector increased by 22.4 percent, but its share of total GDP in Central Otago fell from 7.3 percent to 6.0 percent. During the same period, GDP in the Food, beverage and tobacco industry increased by 21.6 percent, and GDP in the Wood, paper products manufacturing industry increased by 10.7 percent.

Table 3.16 Primary Processing GDP, Central Otago District, 2003 - 2013

Primary processing sector GDP (2013\$m)	Year ending March				%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Food, Beverage and Tobacco	37	37	39	45	15.6	1.8
Wood and Paper Product Manufacturing	11	14	16	16	-1.7	3.2
Primary processing sector	49	51	55	60	10.5	2.1
Total GDP: Central Otago	669	879	939	1,000	6.5	4.1

Source: BERL Regional Database 2013

Table 3.17 shows that the number of business units in the sector in the district has increased more rapidly than the total number of business units in the district, both in the short and longer-terms.

Table 3.17 Primary Processing Business Units, Central Otago District, 2003 - 2013

Primary processing sector Business units	Year ending March				%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Food, Beverage and Tobacco	26	44	44	48	9.1	6.3
Wood and Paper Product Manufacturing	13	17	16	17	6.3	2.7
Primary processing sector	39	61	60	65	8.3	5.2
Total business units: Central Otago	2,523	3,297	3,280	3,340	1.8	2.8

Source: BERL Regional Database 2013

Figure 3.5 compares the change in employment, GDP and business units in the Primary processing sector in the Central Otago District with the national level. Primary processing in the district has performed better than the sector nationally on all three measures.

Figure 3.5 Primary Processing sector growth, Central Otago District vs. New Zealand, 2003 - 2013



3.4.6 Creative sector

The Creative sector in Central Otago is very small, accounting for only 0.6 percent of the district's employment, 0.2 percent of its GDP and 1.9 percent of its business units.

Table 3.18 shows the recent and longer-term contribution of employment in the Creative sector to the Central Otago District economy. The sector has grown slowly over the past ten years with the only industry within the sector of any significance being the Printing and publishing industry.

Table 3.18 Creative sector Employment, Central Otago District, 2003 - 2013

Creative sector Employment (FTEs)	Year ending March				%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Printing and publishing	26	46	41	43	4.5	5.1
Arts and antiques market	3	3	0	0	na	-100.0
Commercial services	11	14	11	9	-25.3	-2.1
Film, video and television services	19	7	0	3	na	-15.7
Music, creative and performing arts and venues	2	8	14	11	-20.8	16.3
Creative sector	61	78	67	66	-0.9	0.8
Total employment: Central Otago	7,472	9,966	10,049	10,419	3.7	3.4

Source: BERL Regional Database 2013

Table 3.19 shows that the sector generated only \$2 million in GDP in 2013, and that it has declined in size during the past decade.

Table 3.19 Creative sector GDP, Central Otago District, 2003 - 2013

Creative sector GDP (2013\$m)	Year ending March				%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Printing and publishing	1	1	1	1	-6.7	4.9
Arts and antiques market	0	0	0	0	na	-100.0
Commercial services	1	1	1	0	-48.7	-13.0
Film, video and television services	1	0	0	0	na	-100.0
Music, creative and performing arts and venues	0	1	1	1	-20.7	20.6
Creative sector	3	3	3	2	-20.7	-4.4
Total GDP: Central Otago	669	879	939	1,000	6.5	4.1

Source: BERL Regional Database 2013

Table 3.20 shows the recent and longer-term change in Creative sector business units in the Central Otago District economy. On this measure there has been significant growth in several parts of the sector over the longer-term, albeit from a very low base.

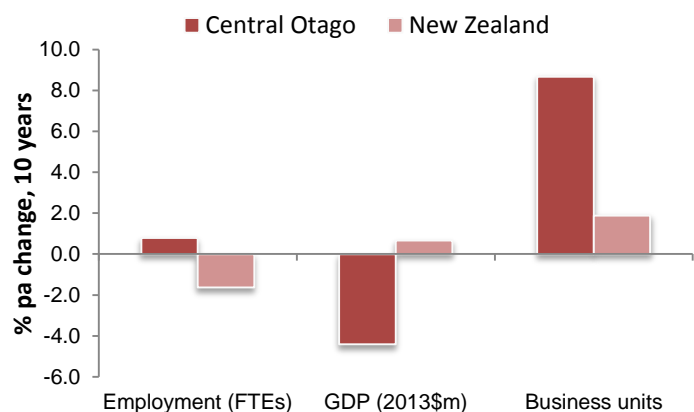
Table 3.20 Creative sector Business Units, Central Otago District, 2003 - 2013

Creative sector Business units	Year ending March				%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Printing and publishing	4	7	8	10	25.0	9.6
Arts and antiques market	2	4	6	6	0.0	11.6
Commercial services	10	27	24	25	4.2	9.6
Film, video and television services	4	4	4	4	0.0	0.0
Music, creative and performing arts and venues	7	15	16	17	6.3	9.3
Creative sector	27	57	58	62	6.9	8.7
Total business units: Central Otago	2,523	3,297	3,280	3,340	1.8	2.8

Source: BERL Regional Database 2013

Figure 3.6 shows the average annual change in employment, GDP and business units in the Creative sector in the Central Otago District, and at a national level since 2003. However, it is difficult to draw meaningful conclusions because the sector is so small in Central Otago.

Figure 3.6 Creative sector growth, Central Otago District vs. New Zealand, 2003 - 2013



Source: BERL Regional Database 2013

3.4.7 Education & Research sector

The Education & research sector in Central Otago employed 515 FTEs in 2013 and contributed \$27 million to the district's GDP. The largest industries within the sector are Primary and secondary education and Preschool education, which together account for around 80 percent of employment in the sector.

Table 3.21 shows the recent and longer-term contribution of Education & research employment to the Central Otago District economy. Between 2003 and 2013, employment in the sector increased by 41.8 percent, but its share of total employment in Central Otago remained at 4.9 percent. During the same period, employment in the Primary and secondary school component of the sector increased by 25.5 percent, and employment in Preschool education increased by 338 percent.

Table 3.21 Education & Research Employment, Central Otago District, 2003 - 2013

Education & Research Sector Employment (FTEs)	Year ending March				%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Preschool Education	24	96	96	105	9.2	15.9
Primary and Secondary Education	247	293	297	310	4.5	2.3
Higher Education	36	28	36	28	-21.6	-2.4
Other Education	16	19	27	30	13.0	6.2
Scientific Research	40	65	50	42	-15.7	0.3
Education & Research sector	363	501	505	515	2.0	3.5
Total employment: Central Otago	7,472	9,966	10,049	10,419	3.7	3.4

Source: BERL Regional Database 2013

As GDP in the public sector (which dominates Education and research) tends to move closely in line with employment, Table 3.22 is qualitatively similar to Table 3.21.

Table 3.22 Education & Research GDP, Central Otago District, 2003 - 2013

Education & Research Sector GDP (2013\$m)	Year ending March				%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Preschool Education	1	5	5	5	9.7	14.9
Primary and Secondary Education	14	14	15	15	5.0	1.4
Higher Education	2	1	2	1	-21.2	-3.3
Other Education	1	1	1	2	13.5	5.2
Scientific Research	4	6	5	4	-16.0	-1.1
Education & Research sector	22	27	27	27	0.9	2.2
Total GDP: Central Otago	669	879	939	1,000	6.5	4.1

Source: BERL Regional Database 2013

Table 3.23 shows the recent and longer-term change in Education & research business/activity units in the Central Otago District economy. The number of units has increased over time, mainly as a result of the expansion of Preschool education.

Table 3.23 Education & Research Business Units, Central Otago District, 2003 - 2013

Education & Research Sector Business units	Year ending March				%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Preschool Education	10	15	16	17	6.3	5.4
Primary and Secondary Education	18	17	17	16	-5.9	-1.2
Higher Education	2	3	5	5	0.0	9.6
Other Education	6	6	10	10	0.0	5.2
Scientific Research	12	14	14	12	-14.3	0.0
Education & Research sector	48	55	62	60	-3.2	2.3
Total business units: Central Otago	2,523	3,297	3,280	3,340	1.8	2.8

Source: BERL Regional Database 2013

Figure 3.7 shows the change in employment, GDP and business units in the Education & research sector in the Central Otago District, and at a regional and national level since 2003. The Education and research sector has grown more rapidly than the sector at national level in terms of all three measures.

Figure 3.7 Education & Research sector key indicator growth, Central Otago District vs. New Zealand, 2003 - 2013



Source: BERL Regional Database 2013

3.4.8 Engineering, Machinery & Equipment Manufacturing

Engineering, machinery & equipment manufacturing is another relatively small sector in the Central Otago District. In 2013, the sector employed just 60 FTEs in 44 business units and generated \$6 million in GDP.

The two industries that make up the sector – Machinery and equipment manufacturing and Consultant engineering services are of similar size. However, growth over the decade has come from the Consultant engineering services.

Table 3.24 shows that the sector was broadly static in employment terms over the past decade; although the sectors share of total employment in the district fell from 0.8 percent in 2003 to 0.6 percent in 2013.

Table 3.24 Engineering, Machinery & Equipment Manufacturing Employment, Central Otago, 2003 – 2013

Engineering, Machinery & Equipment manufacturing sector Employment (FTEs)	Year ending March				%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Machinery and Equipment Manufacturing	39	30	26	32	23.7	-2.0
Consultant Engineering Services	22	29	29	28	-0.4	2.6
Engineering, Machinery & Equipment manufacturing sector	61	59	54	60	11.0	-0.1
Total Employment: Central otago	7,472	9,966	10,049	10,419	3.7	3.4

Source: BERL Regional Database 2013

Table 3.25 shows the recent and longer-term contribution of the sector to GDP in the district economy. This sector has hardly grown over the past ten years, although GDP in the Consultant engineering industry has grown a little.

Table 3.25 Engineering, Machinery & Equipment Manufacturing GDP, Central Otago, 2003 - 2013

Engineering, Machinery & Equipment manufacturing sector GDP (2013\$m)	Year ending March				%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Machinery and Equipment Manufacturing	3	3	3	3	26.4	-0.4
Consultant Engineering Services	2	3	3	3	-0.7	1.2
Engineering, Machinery & Equipment manufacturing sector	6	6	5	6	12.5	0.3
Total GDP: Central Otago	669	879	939	1,000	6.5	4.1

Source: BERL Regional Database 2013

Table 3.26 shows the recent and longer-term change in the number of business units in the sector and in the wider district economy. The number of units in the sector has grown over the longer-term, although it has been static during the past few years.

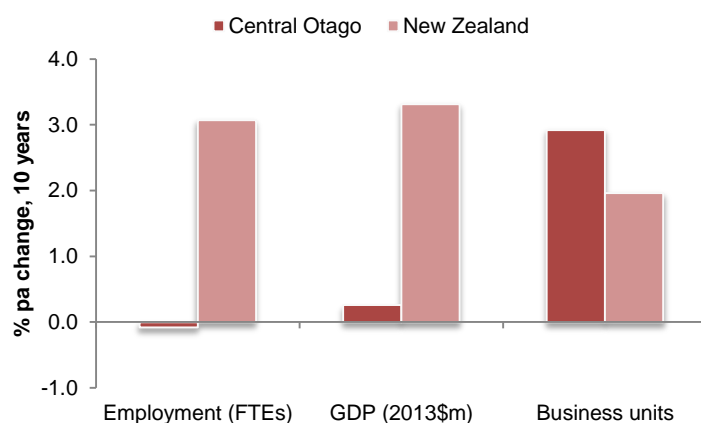
Table 3.26 Engineering, Machinery & Equipment Manufacturing Business Units, Central Otago, 2003 - 2013

Engineering, Machinery & Equipment manufacturing sector Business units	Year ending March				%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Machinery and Equipment Manufacturing	17	15	16	14	-12.5	-1.9
Consultant Engineering Services	16	30	28	30	7.1	6.5
Engineering, Machinery & Equipment manufacturing sector	33	45	44	44	0.0	2.9
Total Business units: Central Otago	2,523	3,297	3,280	3,340	1.8	2.8

Source: BERL Regional Database 2013

Figure 3.8 shows the change in employment, GDP and business units in sector in the Central Otago District and at a national level from 2003 to 2013. However, as was the case with the Creative sector, it is difficult to draw meaningful conclusions because the Engineering, machinery & equipment manufacturing sector is so small in Central Otago

Figure 3.8 Engineering, Machinery & Equipment Manufacturing sector growth, Central Otago District vs. New Zealand, 2003 - 2013



Source: BERL Regional Database 2013

4 Clutha District

4.1 Clutha District economy

Table 4.1 presents 2013 GDP, employment and the number of business units by sector.

Table 4.1 GDP, employment and business units, Clutha District, 2013

Sectors (2013)	FTEs	%	GDP (2013\$m)	%	Business units	%
Primary	3,727	41.9%	392	44.4%	1,484	49.2%
Manufacturing	1,580	17.7%	217	24.6%	66	2.2%
Construction	562	6.3%	38	4.3%	162	5.4%
Wholesale and Distribution	329	3.7%	45	5.1%	94	3.1%
Retail Trade and Services	950	10.7%	55	6.2%	288	9.5%
Business Services	394	4.4%	46	5.3%	748	24.8%
Arts and Recreation Services	17	0.2%	1	0.1%	41	1.4%
Social Services	1,347	15.1%	88	10.0%	134	4.4%
Sub-total (excluding O.O.D.)	8,904	100.0%	882	100.0%	3,017	100.0%
Owner-Occupied Dwellings (O.O.D.)*			108			
Total	8,904		989		3,017	

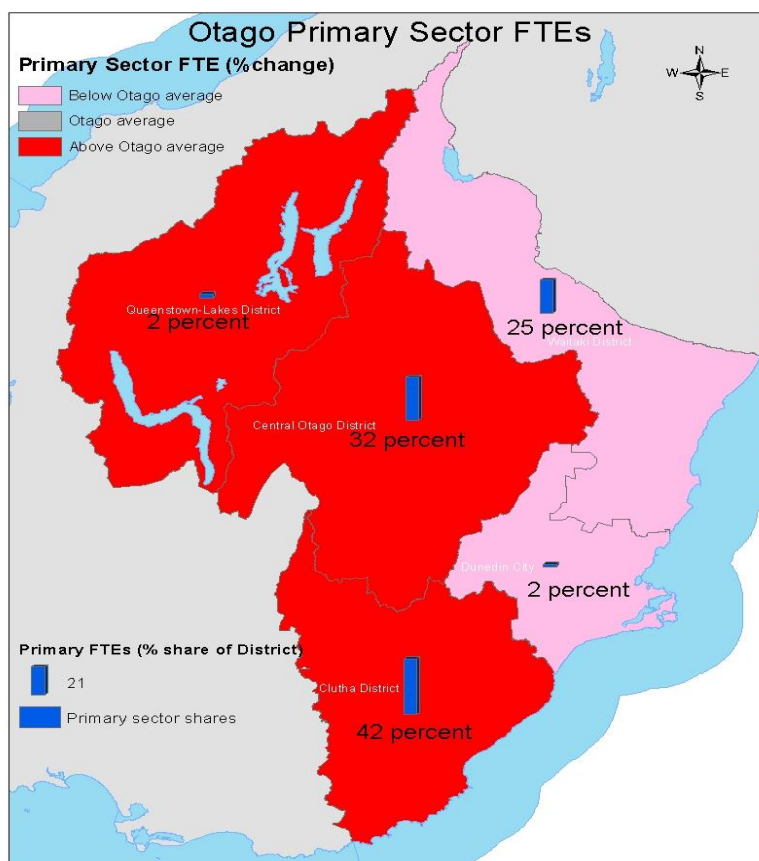
* Imputed value, included in Total GDP only

Source: BERL Regional Database, 2013

Figure 4.1 Primary sector FTEs, Otago Region, 2013¹³

The Clutha District employed around 8,900 FTEs in 3,000 business units, which generated GDP of almost \$1 billion in 2013.

The Primary sector is by far the district's largest sector in terms of employment, GDP and the number of business units. Across the five districts, Clutha has the greatest dependence on the sector.



¹³ Note: 21 bar refers to a scale of 21 percent

4.2 Economic performance – Clutha District

Table 4.2 presents the Clutha District's 2013 key performance indicators relative to the Otago Region and country, and it shows a mixed picture. The district out-performed the region and the country as a whole in terms of GDP per capita, employment and business size growth. However, it underperformed in terms of population and labour productivity growth.

Table 4.2 Key performance indicators, Clutha District, 2013

Key Performance Indicators	%pa for 2013 year		
	Clutha District	Otago Region	New Zealand
Resident population growth	0.0	0.9	0.8
GDP growth	2.5	2.4	2.7
GDP per capita growth	2.5	1.4	1.8
Employment growth	0.7	-0.1	0.2
Labour productivity growth	2.0	2.7	2.7
Business units growth	0.5	1.4	0.7
Business size growth	0.2	-1.5	-0.5

Source: BERL Regional Database, 2013

Table 4.3 shows the key performance indicators for Clutha District, the Otago Region and New Zealand over the last ten years. This table indicates that the district has lagged behind the region and the country as a whole in terms of most of the indicators. The only aspects in which the district has out-performed the region and the country as a whole were in terms of GDP per capita and labour productivity growth.

Table 4.3 Key performance indicators, Clutha District, 2003 to 2013

Key Performance Indicators	%pa for 2003 - 2013		
	Clutha District	Otago Region	New Zealand
Resident population growth	-0.1	0.8	0.9
GDP growth	1.2	1.7	2.1
GDP per capita growth	1.3	0.9	1.2
Employment growth	0.2	1.2	1.5
Labour productivity growth	1.0	0.4	0.7
Business units growth	0.5	2.4	1.8
Business size growth	-0.3	-1.1	-0.3

Source: BERL Regional Database, 2013

The Primary processing sector experienced significant decline in employment and GDP over the past 10 years, both in Food, beverage and tobacco, and Wood and paper product manufacturing.

Although on a positive note there has been growth in employment and GDP in the Tourism sector and some growth in Primary production, and particularly Agriculture over the same period,

Section 8.7 at the end of this report present data on short- and longer-term performance of 86 industries in the district, with performance expressed in terms of employment, GDP and the number of business units.

4.3 Fastest growing industries - Clutha District

Table 4.4 shows the 10 fastest growing industries in the Clutha District by employment over the past ten years. The fastest growing industries have mainly been those providing public services of some kind. It is also notable that some of the fastest growing industries started from a relatively low base.

Table 4.4 Ten fastest growing industries by FTE growth, Clutha District, 2003 to 2013

Rank by FTE growth	Industry	Employment (FTEs)		
		2003	2013	%pa growth
1	Public Order Safety and Regulatory Services	99	355	13.6
2	Social Assistance Services	46	103	8.4
3	Hospitals	59	116	7.1
4	Residential Care Services	88	129	3.9
5	Construction Services	106	130	2.0
6	Preschool and School Education	355	419	1.7
7	Professional Scientific and Technical Services (exc Comp Sys Dsn & related)	158	183	1.5
8	Repair and Maintenance	98	112	1.3
9	Food Retailing	213	238	1.1
10	Heavy and Civil Engineering Construction	223	248	1.1

Source: BERL, Statistics NZ

4.4 Key sectors – Clutha District

This section presents data on the recent and longer-term contribution to employment, GDP and business units in the Clutha District by the six sectors that are key to the regional economy.

4.4.1 Tourism sector

Table 4.5 shows the contribution of the Tourism sector to employment, GDP and business units in the Clutha District in 2013. It indicates that Clutha is less dependent on the sector than New Zealand as a whole.

Table 4.5 Contribution of tourism to Clutha District's economy, 2013

Role of tourism in local economy	Employment	%	GDP (\$2013m)	%	Number of Business Units	%
Tourism-characteristic industries	103	1.2%	4	0.4%	47	4.7%
Tourism-related industries	45	0.5%	3	0.3%	10	0.3%
All non-tourism-related industries	71	0.8%	8	0.8%	23	0.8%
Clutha	219	2.5%	16	1.6%	80	2.7%
New Zealand	100,251	5.3%	7696	3.6%	20,376	4.0%

Source: BERL Regional Database 2013

Table 4.6 shows the recent and longer-term contribution of Tourism employment to the Clutha District economy, expressed in terms of employment, and it suggests that the sector has been growing relatively fast, compared to the district economy as a whole.

Between 2003 and 2013, Tourism employment in the district increased by 54 percent. And its share of total employment increased from 1.6 percent in 2003 to 2.5 percent in 2013.

Table 4.6 Tourism Employment, Clutha District, 2003 - 2013

Tourism Employment (FTEs)	Years ending March				%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Tourism-characteristic industries	65	143	101	103	1.8	4.7
Tourism-related industries	31	58	43	45	4.6	3.7
All non-tourism-related industries	45	94	69	71	3.3	4.6
Tourism Sector	142	295	213	219	2.9	4.4
Total Employment: Clutha	8,726	8,891	8,839	8,904	0.7	0.2

Source: BERL Regional Database 2013

Table 4.7 shows the recent and longer-term contribution of Tourism GDP to the Clutha District economy, and it confirms that the sector has been growing relatively rapidly.

Tourism GDP in Clutha increased by 33.3 percent between 2003 and 2013; and its share of total GDP increased from 1.4 percent in 2003 to 1.6 percent in 2013.

Table 4.7 Tourism GDP, Clutha District, 2003 – 2013

Tourism GDP (2013\$m)	Years ending March				%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Tourism-characteristic industries	4	6	4	4	-1.3	1.2
Tourism-related industries	2	4	3	3	7.3	5.8
All non-tourism-related industries	6	10	7	8	10.5	2.5
Tourism Sector	12	20	15	16	6.4	2.7
Total GDP: Clutha	882	901	966	989	2.5	1.2

Source: BERL Regional Database 2013

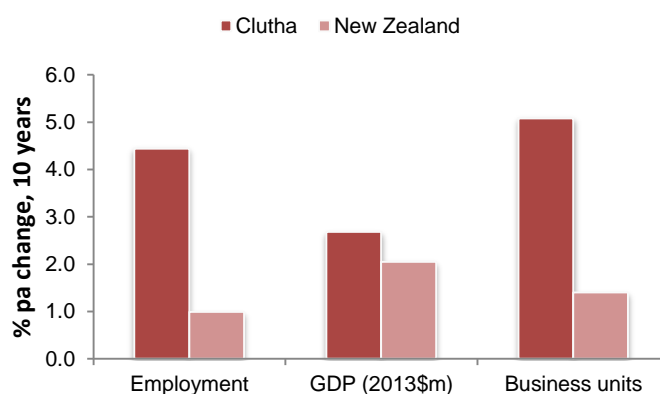
The number of Tourism business units in the Clutha District economy has grown rapidly over the short and longer term, as Table 4.8 shows.

Table 4.8 Tourism Business Units, Clutha District, 2003 - 2013

Tourism Business units	Years ending March				%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Tourism-characteristic industries	27	57	43	47	7.7	5.8
Tourism-related industries	7	13	10	10	5.7	3.5
All non-tourism-related industries	15	30	23	23	3.4	4.5
Tourism Sector	49	100	76	80	6.1	5.1
Total Business Units: Clutha	2,873	2,996	3,002	3,017	0.5	0.5

Source: BERL Regional Database 2013

Figure 4.2 compares the change in employment, GDP and business units in the Tourism sector in the Clutha District and nationally between 2003 and 2013. It indicates that the sector in Clutha has outperformed the sector at national level in terms of all three measures.

Figure 4.2 Tourism sector growth, Clutha District vs. New Zealand, 2003 - 2013

Source: BERL Regional Database 2013

4.4.2 Primary Production sector

As was suggested earlier (see Table 4.1), the Primary production sector accounts for approaching half of all economic activity in Clutha.

Employment in the sector grew by more than total employment in Clutha in 2013 and it has kept pace with the growth of total employment over the longer-term, as Table 4.9 shows.

Between 2003 and 2013, employment in the sector grew by 1.8 percent. Over this period, employment in the Agriculture industry increased by 0.5 percent per annum, but employment in the other parts of the sector fell.

Table 4.9 Primary Production Employment, Clutha District, 2003 - 2013

Primary production sector Employment (FTEs)	Year Ending March				%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Agriculture	2,766	2,994	2,833	2,913	2.8	0.5
Aquaculture	0	0	0	0	na	na
Services to Agriculture; Hunting and Trapping	667	517	588	659	12.2	-0.1
Forestry and Logging	150	151	148	121	-18.5	-2.1
Mining and services to mining	77	35	50	33	-33.6	-8.0
Primary production sector	3,660	3,698	3,619	3,727	3.0	0.2
Total employment: Clutha	8,726	8,891	8,839	8,904	0.7	0.2

Source: BERL Regional Database 2013

Table 4.10 shows the recent and longer-term contribution of Primary production GDP to the Clutha District economy. GDP in the sector has grown significantly faster than employment, implying that productivity in the sector has increased.

Whereas employment in the sector grew by 1.8 percent between 2003 and 2013, GDP in the sector grew by 26.9 percent and GDP in Agriculture grew by 50.3 percent.

Table 4.10 Primary Production GDP, Clutha District, 2003 - 2013

Primary production sector GDP (2013\$m)	Year ending March				%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Agriculture	193	209	260	290	11.8	4.2
Aquaculture	0	0	0	0	na	na
Services to Agriculture; Hunting and Trapping	48	28	36	36	0.0	-2.9
Forestry and Logging	51	74	72	63	-12.7	2.1
Mining and services to mining	17	3	3	2	-29.3	-17.6
Primary production sector	309	314	371	392	5.5	2.4
Total GDP: Clutha	882	901	966	989	2.5	1.2

Source: BERL Regional Database 2013

Table 4.11 shows that the number of business units in the sector in Clutha has been dropping over time. The decline has been mainly in Agriculture and this suggests that there has been a significant number of farm amalgamations.

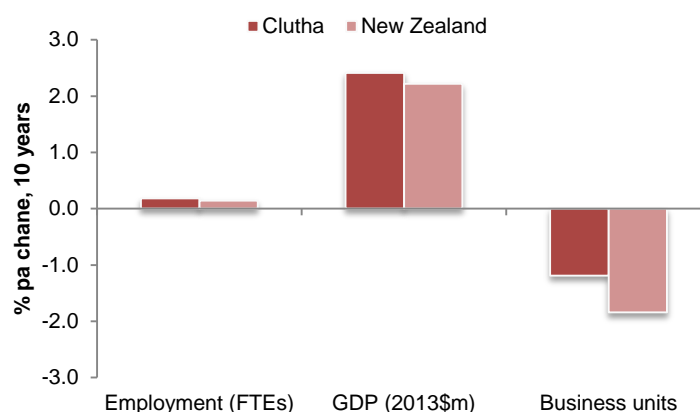
Table 4.11 Primary Production Business Units, Clutha District, 2003 - 2013

Primary production sector Business units	Year ending March				%pa change	
	2003	2011	2012	2013	2011 to 2012	2003 to 2013
Agriculture	1,381	1,243	1,237	1,201	-2.9	-1.4
Aquaculture	0	1	1	1	0.0	na
Services to Agriculture; Hunting and Trapping	143	128	134	138	3.0	-0.4
Forestry and Logging	145	152	148	139	-6.1	-0.4
Mining and services to mining	4	5	5	5	0.0	2.3
Primary production sector	1,673	1,529	1,525	1,484	-2.7	-1.2
Total business units: Clutha	2,873	2,996	3,002	3,017	0.5	0.5

Source: BERL Regional Database 2013

Figure 4.3 shows the change in employment, GDP and business units in the Primary production sector in the Clutha District and nationally between 2003 and 2013. It indicates that the sector in Clutha has performed slightly better than the sector nationally on all three measures.

Figure 4.3 Primary Production sector growth, Clutha District vs. New Zealand, 2003 - 2013



Source: BERL Regional Database 2013

4.4.3 Primary Processing sector

The Primary processing sector in Clutha has not fared as well as the Primary production sector.

Table 4.12 shows the recent and longer-term contribution of employment in the Primary processing sector to the Clutha District economy; and it reveals both short-term and longer-term decline in both parts of the sector.

Over the period from 2003 to 2013, employment in the sector fell by 23.4 percent, and its share of total employment in the district fell from 19.5 percent to 14.6 percent.

Table 4.12 Primary Processing Employment, Clutha District, 2003 – 2013

Primary processing sector Employment (FTEs)	Year ending March				%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Food, Beverage and Tobacco	1,305	1,120	1,141	1,070	-6.2	-2.0
Wood and Paper Product Manufacturing	397	250	241	233	-3.1	-5.2
Primary processing sector	1,702	1,370	1,381	1,303	-5.7	-2.6
Total employment: Clutha	8,726	8,891	8,839	8,904	0.7	0.2

Source: BERL Regional Database 2013

Table 4.13 shows that there was also decline in the sector's GDP. Between 2003 and 2013, the sector's GDP fell by 17.0 percent.

Table 4.13 Primary Processing GDP, Clutha District, 2003 - 2013

Primary processing sector GDP (2013\$m)	Year ending March				%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Food, Beverage and Tobacco	170	147	151	146	-3.4	-1.5
Wood and Paper Product Manufacturing	54	42	42	40	-5.4	-3.1
Primary processing sector	224	189	193	186	-3.9	-1.9
Total GDP: Clutha	882	901	966	989	2.5	1.2

Source: BERL Regional Database 2013

Table 4.14 shows that, despite falls in employment and GDP, the number of business units has increased, at least in the Wood and paper product manufacturing industry. However, the total number of business units is small.

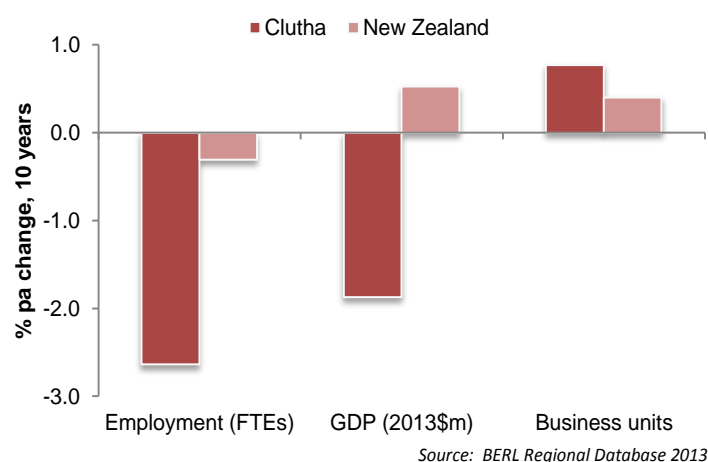
Table 4.14 Primary Processing Business Units, Clutha District, 2003 - 2013

Primary processing sector Business units	Year ending March				%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Food, Beverage and Tobacco	9	9	9	9	0.0	0.0
Wood and Paper Product Manufacturing	16	17	16	18	12.5	1.2
Primary processing sector	25	26	25	27	8.0	0.8
Total business units: Clutha	2,873	2,996	3,002	3,017	0.5	0.5

Source: BERL Regional Database 2013

Figure 4.4 shows the change in employment, GDP and business units in the Primary processing sector in the Clutha District and nationally between 2003 and 2013. It indicates that the sector in Clutha has performed worse than its national counterpart in terms of both employment and GDP, but better in terms of the number of business units. It is notable that, whereas GDP in the sector in Clutha decreased between 2003 and 2013, it increased at national level.

Figure 4.4 Primary Processing sector growth, Clutha District vs. New Zealand, 2003 - 2013



4.4.4 Creative sector

The Creative sector in Clutha is very small, accounting for just 0.9 percent of the district's employment, 0.3 percent of its GDP and 0.7 percent of its business units.

Nonetheless Table 4.15 shows that employment in the sector has grown in both the short-and longer-terms. Between 2003 and 2013, employment in the sector in the district increased by 23.4 percent, with virtually all of the employment occurring in Printing and publishing.

Table 4.15 Creative sector Employment, Clutha District, 2003 - 2013

Creative sector Employment (FTEs)	Year ending March				%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Printing and publishing	58	81	71	76	6.4	2.7
Arts and antiques market	3	0	3	0	-100.0	-100.0
Commercial services	0	3	3	3	-0.4	na
Film, video and television services	0	3	0	0	na	na
Music, creative and performing arts and venues	2	2	0	0	na	-100.0
Creative sector	64	89	77	79	2.6	2.1
Total employment: Clutha	8,726	8,891	8,839	8,904	0.7	0.2

Source: BERL Regional Database 2013

Table 4.16 shows that GDP in the sector increased by 50 percent between 2003 and 2013, albeit from an extremely low base

Table 4.16 Creative sector GDP, Clutha District, 2003 – 2013

Creative sector GDP (2013\$ m)	Year ending March				%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Printing and publishing	2	3	2	3	27.3	5.7
Arts and antiques market	0	0	0	0	-100.0	-100.0
Commercial services	0	0	0	0	2.5	na
Film, video and television services	0	0	0	0	na	na
Music, creative and performing arts and venues	0	0	0	0	na	-100.0
Creative sector	2	3	3	3	16.9	5.0
Total GDP: Clutha	882	901	966	989	2.5	1.2

Source: BERL Regional Database 2013

Table 4.17 indicates that the number of business units in the sector in Clutha has been broadly stable over time.

Table 4.17 Creative sector Business Units, Clutha District, 2003 - 2013

Creative sector Business units	Year ending March				%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Printing and publishing	3	5	5	5	0.0	5.2
Arts and antiques market	5	3	5	6	20.0	1.8
Commercial services	4	4	3	2	-33.3	-6.7
Film, video and television services	1	4	2	1	-50.0	0.0
Music, creative and performing arts and venues	9	3	4	6	50.0	-4.0
Creative sector	22	19	19	20	5.3	-0.9
Total business units: Clutha	2,873	2,996	3,002	3,017	0.5	0.5

Source: BERL Regional Database 2013

Figure 4.5 shows that the sector in Clutha actually performed better than New Zealand as a whole between 2003 and 2013 in terms of both employment and GDP.

Figure 4.5 Creative sector growth, Clutha District vs. New Zealand, 2003 - 2013



Source: BERL Regional Database 2013

4.4.5 Education & Research sector

In 2013, the Education & research sector accounted for 5.3 percent of Clutha's employment, 2.4 percent of its GDP and 1.6 percent of its business/activity units.

Table 4.18 shows the recent and longer-term contribution of Education & research employment to the Clutha District economy. Employment in the sector appears to have rebounded in 2013 after a sharp decline in 2012. This rebound is evident in both the Primary and secondary and Higher education components of the sector, but it might simply reflect a problem with the data in 2012.

Between 2003 and 2013, employment in the sector increased by 20.2 percent, and its share of total employment in the district increased from 4.5 percent to 5.3 percent.

Table 4.18 Education & Research Employment, Clutha District, 2003 - 2013

Education & Research Sector Employment (FTEs)	Year ending March				%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Preschool Education	32	61	65	61	-6.6	6.7
Primary and Secondary Education	323	324	297	358	20.7	1.0
Higher Education	0	58	22	50	128.8	na
Other Education	41	9	9	7	-21.8	-16.3
Scientific Research	0	0	0	0	na	na
Education & Research sector	396	453	393	476	21.2	1.9
Total employment: Clutha	8,726	8,891	8,839	8,904	0.7	0.2

Source: BERL Regional Database 2013

Changes in GDP in the public sector (which dominates Education and research) tend to mirror changes in employment. Table 4.19, therefore, tells a similar story to Table 4.18.

Table 4.19 Education & Research GDP, Clutha District, 2003 - 2013

Education & Research Sector GDP (2013\$m)	Year ending March				%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Preschool Education	2	3	3	3	-6.1	5.7
Primary and Secondary Education	18	16	15	18	21.3	0.1
Higher Education	0	3	1	2	130.0	na
Other Education	2	0	0	0	-21.4	-17.1
Scientific Research	0	0	0	0	na	na
Education & Research sector	22	22	19	24	21.8	0.9
Total GDP: Clutha	882	901	966	989	2.5	1.2

Source: BERL Regional Database 2013

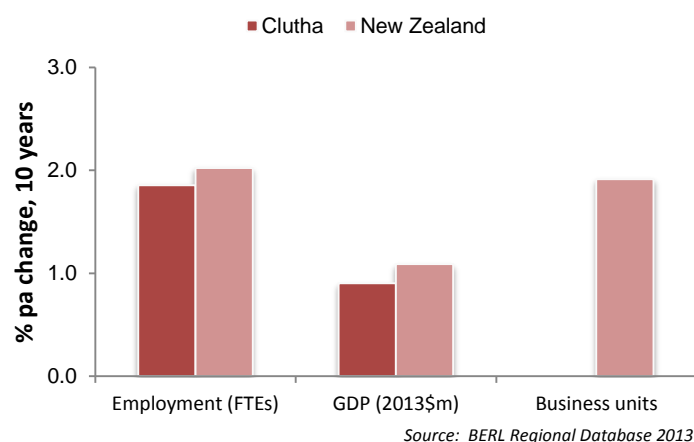
Table 4.20 shows the recent and longer-term change in Education & research business/activity units in the Clutha District economy. It indicates that there has been very little change over the past decade.

Table 4.20 Education & Research Business Units, Clutha District, 2003 - 2013

Education & Research Sector Business units	Year ending March				%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Preschool Education	15	17	18	18	0.0	1.8
Primary and Secondary Education	25	24	24	24	0.0	-0.4
Higher Education	0	2	2	2	0.0	na
Other Education	7	4	5	4	-20.0	-5.4
Scientific Research	1	0	0	0	na	-100.0
Education & Research sector	48	47	49	48	-2.0	0.0
Total business units: Clutha	2,873	2,996	3,002	3,017	0.5	0.5

Source: BERL Regional Database 2013

Figure 4.6 indicates that, over the longer term, employment and GDP in the Education & research sector in the Clutha District grew more slowly than nationally between 2003 and 2013.

Figure 4.6 Education & Research sector growth, Clutha District vs. New Zealand, 2003 - 2013

4.4.6 Engineering, Machinery & Equipment Manufacturing

Although the Engineering, machinery & equipment manufacturing sector in Clutha is small, it has grown over the last decade.

Table 4.21 shows the recent and longer-term changes in employment in the sector in Clutha. Despite a relatively poor year in 2013, employment in the sector increased by 87.2 percent between 2003 and 2013. Over the same period, its share of total employment in the district increased from 0.4 percent to 0.8 percent. Employment has grown in both parts of the sector.

Table 4.21 Engineering, Machinery & Equipment Manufacturing Employment, Clutha District, 2003 - 2013

Engineering, Machinery & Equipment manufacturing sector Employment (FTEs)	Year ending March				%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Machinery and Equipment Manufacturing	26	47	50	44	-11.6	5.6
Consultant Engineering Services	13	24	29	28	-0.4	8.0
Engineering, Machinery & Equipment manufacturing sector	39	72	79	73	-7.5	6.5
Total Employment: Clutha	8,726	8,891	8,839	8,904	0.7	0.2

Source: BERL Regional Database 2013

Table 4.22 shows the recent and longer-term contribution of the sector's GDP to the Clutha District economy. GDP in the sector as a whole, and in both its component industries, more-or-less doubled during the latest ten year period.

Table 4.22 Engineering, Machinery & Equipment Manufacturing GDP, Clutha District, 2003 – 2013

Engineering, Machinery & Equipment manufacturing sector GDP (2013\$m)	Year ending March				%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Machinery and Equipment Manufacturing	2	5	5	5	-9.6	7.2
Consultant Engineering Services	1	2	3	3	-0.7	6.5
Engineering, Machinery & Equipment manufacturing sector	4	7	8	7	-6.5	6.9
Total GDP: Clutha	882	901	966	989	2.5	1.2

Source: BERL Regional Database 2013

Table 4.23 shows longer-term decline in the number of business units in the Machinery & equipment manufacturing component of the sector, but growth in the Consultant engineering services component. The number of business units has also grown in the longer-term in the sector as a whole.

Table 4.23 Engineering, Machinery & Equipment Manufacturing Business Units, Clutha District, 2003 - 2013

Engineering, Machinery & Equipment manufacturing sector Business units	Year ending March				%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Machinery and Equipment Manufacturing	14	7	7	8	14.3	-5.4
Consultant Engineering Services	7	8	9	10	11.1	3.6
Engineering, Machinery & Equipment manufacturing sector	21	15	16	18	12.5	-1.5
Total Business units: Clutha	2,873	2,996	3,002	3,017	0.5	0.5

Source: BERL Regional Database 2013

Figure 4.7 compares changes in employment, GDP and business units in the sector in the Clutha between 2003 and 2013 with the changes that occurred nationally. It shows that the sector in Clutha out-performed its national counterparts in terms of employment and GDP.

Figure 4.7 Engineering, Machinery & Equipment Manufacturing sector growth, Clutha District vs. New Zealand, 2003 - 2013



Source: BERL Regional Database 2013

5 Dunedin City

5.1 Dunedin City economy

Dunedin's economy generates nearly 50,000 FTE jobs and \$4.9 billion in GDP in 11,000 business units. The city's economy is roughly the same size as the economy of the four other districts in the region combined.

Table 5.1 GDP, employment and business units, Dunedin City, 2013

Sectors (2013)	FTEs	%	GDP (2013\$m)	%	Business units	%
Primary	1,120	2.2%	131	3.2%	932	8.7%
Manufacturing	4,121	8.3%	547	13.2%	468	4.3%
Construction	4,138	8.3%	277	6.7%	1,002	9.3%
Wholesale and Distribution	4,312	8.6%	569	13.7%	784	7.3%
Retail Trade and Services	10,543	21.1%	584	14.1%	1,972	18.3%
Business Services	7,677	15.4%	867	20.9%	4,277	39.7%
Arts and Recreation Services	1,088	2.2%	74	1.8%	269	2.5%
Social Services	16,874	33.8%	1,105	26.6%	1,067	9.9%
Sub-total (excluding O.O.D.)	49,874	100.0%	4,154	100.0%	10,771	100.0%
Owner-Occupied Dwellings (O.O.D)*			767			
Total	49,874		4,921		10,771	

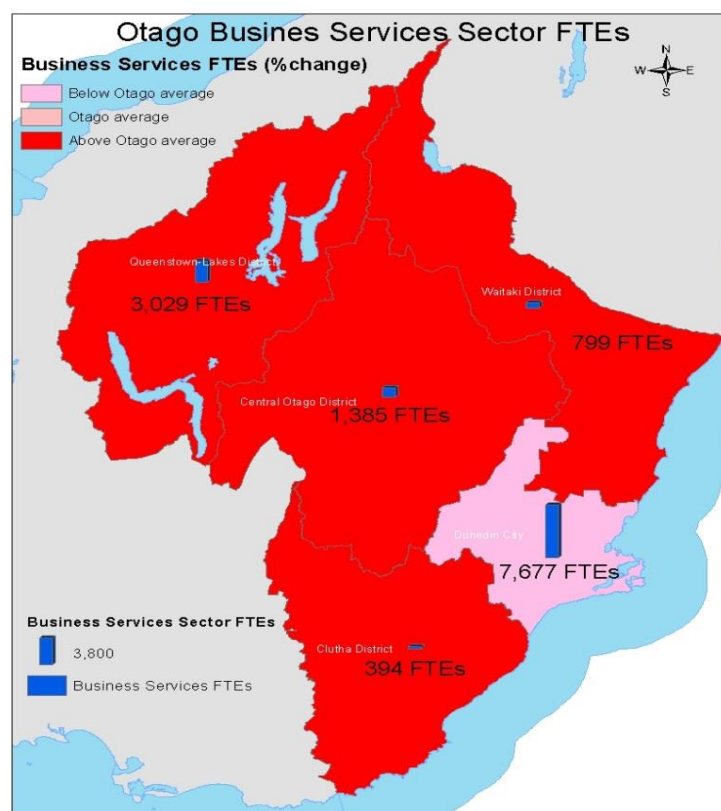
* Imputed value, included in Total GDP only

Source: BERL Regional Database, 2013

Because Dunedin is a city, the structure of its economy is different from the structure of the economy in the hinterland it serves.

This is reflected in Table 5.1, which shows that a third of the city's employment, and more than a quarter of its GDP, is in the Social services (including education, health and local government). The Business services sector is also more important to the surrounding districts.

Figure 5.1 Business services sector FTEs, Otago Region, 2013



¹⁴ Note: 3800 bar refers to a scale of 3,800 FTEs

5.2 Economic performance – Dunedin City

Table 5.2 summarises the performance of Dunedin City across key performance indicators for the latest year, and compares this performance with that of the Otago Region and New Zealand.

The table shows that Dunedin's economy performed worse than the region's economy in relation to all the indicators except growth in GDP per capita and labour productivity.

Table 5.2 Key performance indicators, Dunedin City, 2013

Key Performance Indicators	%pa for 2013 year		
	Dunedin City	Otago Region	New Zealand
Resident population growth	0.5	0.9	0.8
GDP growth	2.0	2.4	2.7
GDP per capita growth	1.5	1.4	1.8
Employment growth	-1.1	-0.1	0.2
Labour productivity growth	3.4	2.7	2.7
Business units growth	1.1	1.4	0.7
Business size growth	-2.1	-1.5	-0.5

Source: BERL Regional Database, 2013

Table 5.3 shows the change in key performance indicators for Dunedin City over the last ten years compared to the region and national economies. The city's economy has struggled due mainly to declining employment and GDP in the Primary processing sector with a worse performance than the region and the country as a whole, in terms of each of the indicators shown.

Table 5.3 Key performance indicators, Dunedin City, 2003 to 2013

Key Performance Indicators	%pa for 2003 - 2013		
	Dunedin City	Otago Region	New Zealand
Resident population growth	0.2	0.8	0.9
GDP growth	0.8	1.7	2.1
GDP per capita growth	0.5	0.9	1.2
Employment growth	0.4	1.2	1.5
Labour productivity growth	0.3	0.4	0.7
Business units growth	1.7	2.4	1.8
Business size growth	-1.3	-1.1	-0.3

Source: BERL Regional Database, 2013

5.3 Fastest-growing industries - Dunedin City

Table 5.4 shows the 10 fastest growing industries in the city, by employment, in the ten years to 2013.

Table 5.4 Ten fastest growing industries by FTE growth, Dunedin City, 2003 to 2013

Rank by FTE growth	Industry	Employment (FTEs)		
		2003	2013	%pa growth
1	Computer System Design and Related Services	114	220	6.8
2	Building Construction	574	1,029	6.0
3	Rental and Hiring Services (except Real Estate)	163	274	5.3
4	Professional Scientific and Technical Services (exc Comp Sys Dsn & related)	1,748	2,763	4.7
5	Transport Support Services	373	560	4.2
6	Heritage Activities	223	332	4.0
7	Medical and Other Health Care Services	983	1,456	4.0
8	Public Order Safety and Regulatory Services	840	1,218	3.8
9	Auxiliary Finance and Insurance Services	295	410	3.4
10	Property Operators and Real Estate Services	304	423	3.4

Source: BERL, Statistics NZ

Section 8.8 at the end of this report shows the ten year employment growth rates for 86 different industries; 35 of the industries experienced employment losses over that period.

5.4 Key sectors – Dunedin City

This section presents the recent and longer-term contribution of employment, GDP and Business Units in the six key sectors in Dunedin City. We have also included an analysis of the ICT sector for Dunedin City.

5.4.1 Tourism sector

Table 5.5 shows the contribution of Tourism to employment, GDP and business units in Dunedin in 2013. The table indicates that Tourism is more important to the city's economy than it is to the national economy.

Table 5.5 Tourism sector's contribution to Dunedin City's economy, 2013

Role of tourism in local economy	Employment	%	GDP (\$2013m)	%	Number of Business Units	%
Tourism-characteristic industries	2,067	4.1%	122	2.5%	342	7.0%
Tourism-related industries	553	1.1%	41	0.8%	83	0.8%
All non-tourism-related industries	404	0.8%	43	0.9%	90	0.8%
Dunedin City	3,024	6.1%	206	4.2%	515	4.8%
New Zealand	100,251	5.3%	7696	3.6%	20,376	4.0%

Source: BERL Regional Database 2013

Table 5.6 shows the recent and longer-term contribution of Tourism employment to the Dunedin City economy.

The data suggest that 2013 was a poor year, but that the sector has grown strongly over the past ten years. Between 2003 and 2013, employment in the sector in Dunedin grew by 168 percent. Over the same period the sector's share of total employment in the city increased from 2.4 percent to 6.0 percent.

Table 5.6 Tourism Employment, Dunedin City, 2003 - 2013

Tourism Employment (FTEs)	Years ending March				%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Tourism-characteristic industries	546	1,973	2,392	2,067	-13.6	14.2
Tourism-related industries	366	539	594	553	-7.0	4.2
All non-tourism-related industries	215	388	446	404	-9.5	6.5
Tourism Sector	1,128	2,901	3,433	3,024	-11.9	10.4
Total Employment: Dunedin City	47,897	50,722	50,413	49,874	-1.1	0.4

Source: BERL Regional Database 2013

Table 5.7 shows the recent and longer-term contribution of Tourism GDP to the Dunedin City economy. The table confirms that 2013 was a poor year for the sector, but that it has grown strongly over the longer-term. The table also indicates that the longer-term rate of growth in the sector's GDP has been less than half the longer-term rate of growth in the sector's employment. This implies that productivity in the sector has fallen significantly.

Table 5.7 Tourism GDP, Dunedin City, 2003 - 2013

Tourism GDP (2013\$m)	Years ending March				%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Tourism-characteristic industries	80	121	139	122	-12.4	4.3
Tourism-related industries	22	36	43	41	-4.6	6.3
All non-tourism-related industries	31	42	45	43	-2.8	3.5
Tourism Sector	133	199	226	206	-9.0	4.5
Total GDP: Dunedin City	4,557	4,858	4,825	4,921	2.0	0.8

Source: BERL Regional Database 2013

Table 5.8 shows the recent and longer-term change in the number of Tourism business units in the Dunedin City economy. The table tells a very similar story to the previous tables on employment and GDP.

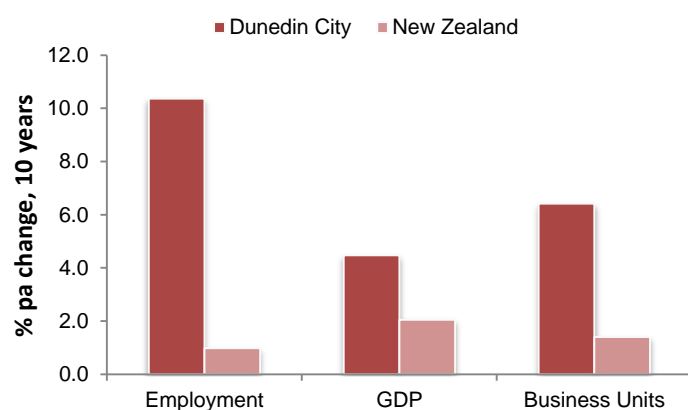
Table 5.8 Tourism Business Units in Dunedin City, 2003 - 2013

Tourism Business units	Years ending March				%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Tourism-characteristic industries	188	322	364	342	-6.1	6.2
Tourism-related industries	46	82	93	83	-10.0	6.1
All non-tourism-related industries	42	80	97	90	-7.7	7.8
Tourism Sector	276	484	554	515	-7.0	6.4
Total Business Units: Dunedin City	9,119	10,636	10,658	10,771	1.1	1.7

Source: BERL Regional Database 2013

Figure 5.2 puts the performance of the sector in Dunedin into context by comparing it with the performance of the sector at national level. It demonstrates that the sector in the city has out-performed the sector nationally in terms of all three of the measures shown.

Figure 5.2 Tourism sector key indicator growth, Dunedin City vs. New Zealand, 2003 - 2013



Source: BERL Regional Database 2013

5.4.2 Primary Production sector

Dunedin City does have a rural hinterland of its own within its boundaries, but its Primary production sector is relatively small. Table 5.9 indicates that sector has declined in terms of employment over the past decade, particularly in Agriculture.

Between 2003 and 2013, employment in the sector fell by 22.8 percent, and its share of total employment in the city fell from 3.0 percent to 2.2 percent.

Table 5.9 Primary Production Employment, Dunedin City, 2003 – 2013

Primary production sector Employment (FTEs)	Year Ending March				%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Agriculture	1,122	937	997	761	-23.7	-3.8
Aquaculture	6	0	0	0	na	-100.0
Services to Agriculture; Hunting and Trapping	210	176	203	233	14.8	1.1
Forestry and Logging	97	87	76	74	-2.2	-2.6
Mining and services to mining	15	56	52	51	-0.4	12.7
Primary production sector	1,450	1,256	1,328	1,120	-15.7	-2.5
Total employment: Dunedin City	47,897	50,722	50,413	49,874	-1.1	0.4

Source: BERL Regional Database 2013

Table 5.10 indicates that the sector's GDP grew marginally in the longer-term past. However, the picture within the sector was mixed, with a decline in Agriculture slightly outweighed by growth in Forestry and logging.

Table 5.10 Primary Production GDP, Dunedin City, 2003 - 2013

Primary production sector GDP (2013\$m)	Year ending March				%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Agriculture	78	65	91	76	-17.0	-0.3
Aquaculture	0	0	0	0	na	-100.0
Services to Agriculture; Hunting and Trapping	15	10	12	13	2.3	-1.7
Forestry and Logging	33	42	37	39	4.8	1.6
Mining and services to mining	3	5	3	4	6.0	1.0
Primary production sector	130	122	144	131	-9.2	0.1
Total GDP: Dunedin City	4,557	4,858	4,825	4,921	2.0	0.8

Source: BERL Regional Database 2013

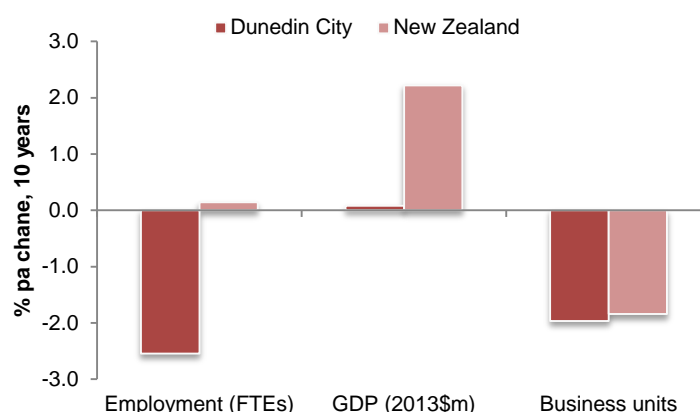
Table 5.11 shows that there have been ongoing declines in the number of business units in all parts of the sector, apart from in Mining and services to mining. This is in contrast with growth in the number of business units in the city economy as a whole.

Table 5.11 Primary Production Business Units, Dunedin City, 2003 - 2013

Primary production sector Business units	Year ending March				%pa change	
	2003	2011	2012	2013	2011 to 2012	2003 to 2013
Agriculture	833	680	695	673	-3.2	-2.1
Aquaculture	4	2	2	2	0.0	-6.7
Services to Agriculture; Hunting and Trapping	162	131	140	131	-6.4	-2.1
Forestry and Logging	129	127	116	110	-5.2	-1.6
Mining and services to mining	9	12	14	16	14.3	5.9
Primary production sector	1,137	952	967	932	-3.6	-2.0
Total business units: Dunedin City	9,119	10,636	10,658	10,771	1.1	1.7

Source: BERL Regional Database 2013

Figure 5.3 compares the performance of the sector in the city with the performance of the sector at national level. It shows that the sector in Dunedin has performed worse than the sector nationally in terms of all three key measures.

Figure 5.3 Primary Production sector growth, Dunedin City vs. New Zealand, 2003 - 2013

Source: BERL Regional Database 2013

5.4.3 Primary Processing sector

The Primary processing sector in Dunedin is larger than the Primary production sector. For example, GDP in the Primary processing sector in the city in 2013 was almost twice the size of GDP in the Primary production sector. However, the following tables will show that the sector has declined over the past decade, despite evidently rebounding in 2013 from a poor year in 2012.

Table 5.12 shows the recent and longer-term contribution of Primary processing employment to the Dunedin City economy. Employment in the sector fell by almost 50 percent between 2003 and 2013, with most of the decline occurring in Food, beverage and tobacco processing.

Table 5.12 Primary Processing Employment, Dunedin City, 2003 - 2013

Primary processing sector Employment (FTEs)	Year ending March				%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Food, Beverage and Tobacco	3,059	1,241	1,024	1,463	42.9	-7.1
Wood and Paper Product Manufacturing	416	326	345	301	-12.9	-3.2
Primary processing sector	3,475	1,567	1,370	1,764	28.8	-6.6
Total employment: Dunedin City	47,897	50,722	50,413	49,874	-1.1	0.4

Source: BERL Regional Database 2013

Table 5.13 indicates that GDP in the sector in Dunedin fell slightly less rapidly than employment in the sector over the past decade. Nonetheless, at 45 percent, the decline was still large. As was the case with employment, GDP in Food, beverage and tobacco processing fell more than GDP in the Wood and paper manufacturing.

Table 5.13 Primary Processing GDP, Dunedin City, 2003 - 2013

Primary processing sector GDP (2013\$m)	Year ending March				%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Food, Beverage and Tobacco	398	163	136	200	47.1	-6.7
Wood and Paper Product Manufacturing	57	55	60	51	-15.0	-1.1
Primary processing sector	455	218	196	251	28.1	-5.8
Total GDP: Dunedin City	4,557	4,858	4,825	4,921	2.0	0.8

Source: BERL Regional Database 2013

Table 5.14 shows that, despite large longer-term declines in the sector's employment and GDP, the number of business units in the sector fell only marginally between 2003 and 2013.

Table 5.14 Primary Processing Business Units, Dunedin City, 2003 - 2013

Primary processing sector Business units	Year ending March				%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Food, Beverage and Tobacco	80	73	74	78	5.4	-0.3
Wood and Paper Product Manufacturing	52	47	49	48	-2.0	-0.8
Primary processing sector	132	120	123	126	2.4	-0.5
Total business units: Dunedin City	9,119	10,636	10,658	10,771	1.1	1.7

Source: BERL Regional Database 2013

Figure 5.4 shows that the sector in Dunedin performed less well between 2003 and 2013 than the sector nationally in terms of all three key measures.

Figure 5.4 Primary Processing sector growth, Dunedin City vs. New Zealand, 2003 – 2013



5.4.4 Creative sector

The Creative sector in Dunedin is relatively large, generating nearly 1,300 FTE jobs in the city in 2013. Although Printing and publishing is the largest component of the sector, it also includes a reasonably large Film, video and TV services industry.

Employment in the sector has declined over recent years, as Table 5.15 shows. Between 2003 and 2013, employment in the sector fell by 22.4 percent, and its share of all employment in the city fell from 3.5 percent in 2003 to 2.5 percent in 2013.

Over the same period, employment in the Printing and publishing industry within the sector fell by 33 percent and employment in the Music, creative and performing arts industry fell by 43 percent.

Table 5.15 Creative sector Employment, Dunedin City, 2003 - 2013

Creative sector Employment (FTEs)	Year ending March				%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Printing and publishing	1,053	840	746	705	-5.5	-3.9
Arts and antiques market	91	60	59	63	6.0	-3.6
Commercial services	158	193	214	223	4.0	3.5
Film, video and television services	226	212	230	220	-4.1	-0.3
Music, creative and performing arts and venues	127	77	81	73	-10.2	-5.3
Creative sector	1,655	1,383	1,331	1,284	-3.5	-2.5
Total employment: Dunedin City	47,897	50,722	50,413	49,874	-1.1	0.4

Source: BERL Regional Database 2013

Table 5.16 shows the recent and longer-term contribution of Creative sector GDP to the Dunedin City economy, and it paints a similar picture to Table 5.15 on employment. Between 2003 and 2013, GDP in the sector fell by 15 percent, and the greatest declines were in the Printing and publishing and the Music, creative and performing arts industries.

Table 5.16 Creative sector GDP, Dunedin City, 2003 - 2013

Creative sector GDP (2013\$ m)	Year ending March				%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Printing and publishing	15	11	9	9	1.0	-4.6
Arts and antiques market	4	4	4	4	13.4	0.9
Commercial services	8	9	11	12	10.4	3.9
Film, video and television services	17	14	17	15	-7.6	-1.3
Music, creative and performing arts and venues	10	5	6	5	-12.4	-6.0
Creative sector	55	44	47	47	-0.4	-1.5
Total GDP: Dunedin City	4,557	4,858	4,825	4,921	2.0	0.8

Source: BERL Regional Database 2013

By contrast, Table 5.17 indicates that the number of Creative sector business units in the Dunedin City economy has increased slightly over the past ten years.

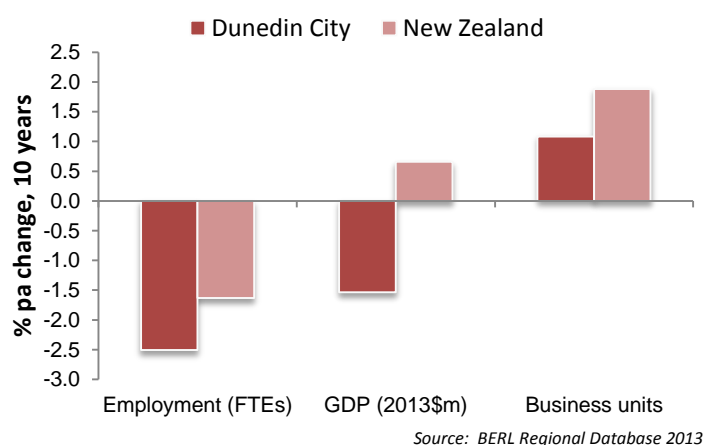
Table 5.17 Creative sector Business Units, Dunedin City, 2003 - 2013

Creative sector Business units	Year ending March				%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Printing and publishing	38	43	43	45	4.7	1.7
Arts and antiques market	54	39	42	41	-2.4	-2.7
Commercial services	110	133	137	143	4.4	2.7
Film, video and television services	40	50	51	46	-9.8	1.4
Music, creative and performing arts and venues	83	94	90	87	-3.3	0.5
Creative sector	325	359	363	362	-0.3	1.1
Total business units: Dunedin City	9,119	10,636	10,658	10,771	1.1	1.7

Source: BERL Regional Database 2013

Figure 5.5 indicates that the sector in Dunedin has performed less well than the sector nationally in terms of both employment and GDP during the period 2003-2013. However, the sector has performed better in terms of the number of business units.

Figure 5.5 Creative sector growth, Dunedin City vs. New Zealand, 2003 - 2013



5.4.5 Education & Research sector

The Education & research sector is one of Dunedin City's most significant employers and contributors to GDP, accounting for almost 14 percent of total employment and 8 percent of GDP in 2013. The sector has grown over the years.

Table 5.18 shows the recent and longer-term contribution of the Education & research sector to employment in Dunedin. The table indicates that employment in the sector grew by 18.3 percent between 2003 and 2013, and that its share of total employment in the city grew from 12.6 percent to 14.4 percent over the same period. Employment in all parts of the sector increased, with the most rapid increases coming in the Preschool education and Scientific research industries.

Table 5.18 Education & Research Employment, Dunedin City, 2003 - 2013

Education & Research Sector Employment (FTEs)	Year ending March				%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Preschool Education	255	438	471	472	0.1	6.4
Primary and Secondary Education	1,790	1,835	1,645	1,882	14.4	0.5
Higher Education	3,625	4,367	4,191	4,313	2.9	1.8
Other Education	172	197	195	182	-6.8	0.5
Scientific Research	215	363	330	321	-2.7	4.1
Education & Research sector	6,057	7,201	6,832	7,169	4.9	1.7
Total employment: Dunedin City	47,897	50,722	50,413	49,874	-1.1	0.4

Source: BERL Regional Database 2013

The data in Table 5.19 imply that GDP in the sector grew less quickly than employment between 2003 and 2013. The table also indicates that GDP growth did not occur in all industries within the sector.

Table 5.19 Education & Research GDP, Dunedin City, 2003 - 2013

Education & Research Sector GDP (2013\$m)	Year ending March				%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Preschool Education	14	21	23	24	0.6	5.4
Primary and Secondary Education	98	89	82	94	15.0	-0.4
Higher Education	199	213	208	215	3.4	0.8
Other Education	9	10	10	9	-6.4	-0.4
Scientific Research	23	33	31	30	-3.0	2.6
Education & Research sector	343	366	354	371	5.1	0.8
Total GDP: Dunedin City	4,557	4,858	4,825	4,921	2.0	0.8

Source: BERL Regional Database 2013

Table 5.20 shows that the number of business/activity units in the sector grew slightly less quickly than the number of business/activity units in the local economy as a whole over the longer-term. There was, however, a large increase in the number of units in the Scientific research industry.

Table 5.20 Education & Research Business Units, Dunedin City, 2003 - 2013

Education & Research Sector Business units	Year ending March				%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Preschool Education	69	77	76	73	-3.9	0.6
Primary and Secondary Education	94	81	78	77	-1.3	-2.0
Higher Education	22	26	29	25	-13.8	1.3
Other Education	61	83	80	79	-1.3	2.6
Scientific Research	45	69	70	73	4.3	5.0
Education & Research sector	291	336	333	327	-1.8	1.2
Total business units: Dunedin City	9,119	10,636	10,658	10,771	1.1	1.7

Source: BERL Regional Database 2013

Figure 5.6 shows that, despite the strength of the sector in Dunedin, it grew less quickly than the sector in New Zealand as a whole between 2003 and 2013, regardless of the measure used.

Figure 5.6 Education & Research sector growth, Dunedin City vs. New Zealand, 2003 - 2013

Source: BERL Regional Database 2013

5.4.6 Engineering, Machinery & Equipment Manufacturing

As was noted at the beginning of the report, the Engineering, machinery & equipment manufacturing sector is more broadly defined in Dunedin than it is in the other territorial authority areas.

The sector in Dunedin employs almost 1,800 FTEs and generates \$184 million in GDP. Despite a relatively poor year in 2013, the sector has grown over the longer term.

Table 5.21 shows the short- and longer-term contribution of the sector to total employment in Dunedin. Between 2003 and 2013, employment in the sector grew by 17.0 and its share of total employment in the city increased from 3.2 percent to 3.6 percent.

However, the table makes plain the industries within the sector have enjoyed contrasting fortunes, with employment in Machinery and equipment manufacturing falling moderately, while employment in Transport equipment manufacturing has grown only slowly. By contrast, employment in the Consultant engineering services grew significantly.

Table 5.21 Engineering, Machinery & Equipment Manufacturing Employment, Dunedin City, 2003 - 2013

Engineering, Machinery & Equipment manufacturing sector Employment (FTEs)	Year ending March				%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Machinery and Equipment Manufacturing	486	448	463	433	-6.5	-1.2
Consultant Engineering Services	228	367	419	399	-4.9	5.7
Primary Metal and Metal Product Manufacturing	129	100	140	151	7.5	1.6
Fabricated Metal Product Manufacturing	472	586	599	585	-2.4	2.2
Transport Equipment Manufacturing	220	317	201	231	14.6	0.5
Engineering, Machinery & Equipment manufacturing sector	1,536	1,818	1,822	1,797	-1.4	1.6
Total Employment: Dunedin City	47,897	50,722	50,413	49,871	-1.1	0.4

Source: BERL Regional Database 2013

Table 5.22 shows that GDP in the sector grew more slowly over the longer-term than employment. It also indicates that, again, Consultant engineering services grew most rapidly.

Table 5.22 Engineering, Machinery & Equipment Manufacturing GDP, Dunedin City, 2003 - 2013

Engineering, Machinery & Equipment manufacturing sector GDP (2013\$m)	Year ending March				%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Machinery and Equipment Manufacturing	42	43	45	43	-4.8	0.1
Consultant Engineering Services	25	34	39	37	-5.2	4.2
Primary Metal and Metal Product Manufacturing	17	11	15	16	8.1	-0.6
Fabricated Metal Product Manufacturing	64	62	65	64	-1.9	0.0
Transport Equipment Manufacturing	19	31	20	24	17.1	2.1
Engineering, Machinery & Equipment manufacturing sector	167	180	184	184	-0.4	0.9
Total GDP: Dunedin City	4,557	4,858	4,825	4,921	2.0	0.8

Source: BERL Regional Database 2013

Table 5.23 shows the recent and longer-term change in the number of business units in the sector in Dunedin over the longer term, and it tells a similar story to the preceding tables on employment and GDP.

Table 5.23 Engineering, Machinery & Equipment Manufacturing Business Units, Dunedin City, 2003 - 2013

Engineering, Machinery & Equipment manufacturing sector Business units	Year ending March				%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Machinery and Equipment Manufacturing	68	66	68	69	1.5	0.1
Consultant Engineering Services	76	100	102	100	-2.0	2.8
Primary Metal and Metal Product Manufacturing	6	7	6	6	0.0	0.0
Fabricated Metal Product Manufacturing	82	79	77	76	-1.3	-0.8
Transport Equipment Manufacturing	32	37	35	34	-2.9	0.6
Engineering, Machinery & Equipment manufacturing sector	264	289	288	285	-1.0	0.8
Total Business units: Dunedin City	9,119	10,636	10,658	10,771	1.1	1.7

Source: BERL Regional Database 2013

Figure 5.7 suggests that, while the sector has grown over the longer-term in Dunedin, it has not grown as quickly as the sector in New Zealand as a whole.

Figure 5.7 Engineering, Machinery & Equipment Manufacturing sector growth, Dunedin City vs. New Zealand, 2003 - 2013



Source: BERL Regional Database 2013

5.4.7 ICT sector

Within the Otago region, the ICT sector is of particular importance to Dunedin. The sector has more than 600 FTE employees and it generates more than \$130 million in GDP.

Table 5.24 shows the recent and longer-term contribution of ICT employment to the Dunedin City economy. 2013 was a good year for the sector overall, but its component industries experienced mixed fortunes. Employment in ICT wholesaling and Commercial services grew very quickly, but employment in ICT manufacturing and Telecommunications services fell sharply.

Between 2003 and 2013, employment in the sector increased by 25.6 percent and its share of all employment in Dunedin increased from 1.1 percent to 1.3 percent.

Table 5.24 ICT Employment, Dunedin City, 2003 - 2013

ICT sector Employment (FTEs)	Year ending March				%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Manufacturing	44	41	49	43	-11.8	-0.1
Wholesaling	262	229	267	309	15.7	1.7
Telecommunication services	51	73	68	53	-22.2	0.4
Commercial services	150	224	197	232	17.9	4.5
ICT sector	507	568	581	637	9.7	2.3
Total employment: Dunedin City	47,897	50,722	50,413	49,874	-1.1	0.4

Source: BERL Regional Database 2013

Table 5.25 shows the recent and longer-term contribution of ICT GDP to the Dunedin City economy between 2003 and 2013. Despite employment growth in the sector, there was only a small increase in GDP in 2013, and zero growth in the longer-term. Normally, one would expect GDP to increase faster than employment.

Table 5.25 ICT GDP, Dunedin City, 2003 - 2013

ICT sector GDP (2013\$m)	Year ending March				%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Manufacturing	4	4	5	4	-9.9	1.7
Wholesaling	29	27	31	37	17.1	2.3
Telecommunication services	51	80	67	57	-14.7	1.2
Commercial services	48	41	27	34	26.5	-3.5
ICT sector	132	152	130	132	1.6	0.0
Total GDP: Dunedin City	4,557	4,858	4,825	4,921	2.0	0.8

Source: BERL Regional Database 2013

Table 5.26 indicates that the number of business units in the sector in the city has moved more in line with changes in employment than with changes in GDP.

Table 5.26 ICT Business Units, Dunedin City, 2003 – 2013

ICT sector Business units	Year ending March				%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Manufacturing	7	6	7	7	0.0	0.0
Wholesaling	63	53	51	59	15.7	-0.7
Telecommunication services	7	8	7	7	0.0	0.0
Commercial services	77	126	126	134	6.3	5.7
ICT sector	154	193	191	207	8.4	3.0
Total business units: Dunedin City	9,119	10,636	10,658	10,771	1.1	1.7

Source: BERL Regional Database 2013

Figure 5.8 shows the change in employment, GDP and business units in the ICT sector in Dunedin City and nationally between 2003 and 2013. It indicates that growth rates in employment and the number of business units in the sector in Dunedin were broadly on a par with national growth rates, but GDP growth in the sector at national level did not occur in Dunedin.

Figure 5.8 ICT sector growth, Dunedin City vs. New Zealand, 2003 - 2013



Source: BERL Regional Database 2013

6 Queenstown Lakes District

6.1 Economy – Queenstown Lakes District

Table 6.1 indicates that the economy in the Queenstown Lakes District generates a little less than 16,000 FTE jobs, just over \$1.3 billion in GDP and almost 6,500 business units. The two largest sectors are the Retail trade and services and Business services.

As will be seen in this section, the Queenstown Lakes economy has grown rapidly and remains buoyant, compared to the Otago region and national economies.

Table 6.1 GDP, employment, and business units, Queenstown Lakes District, 2013

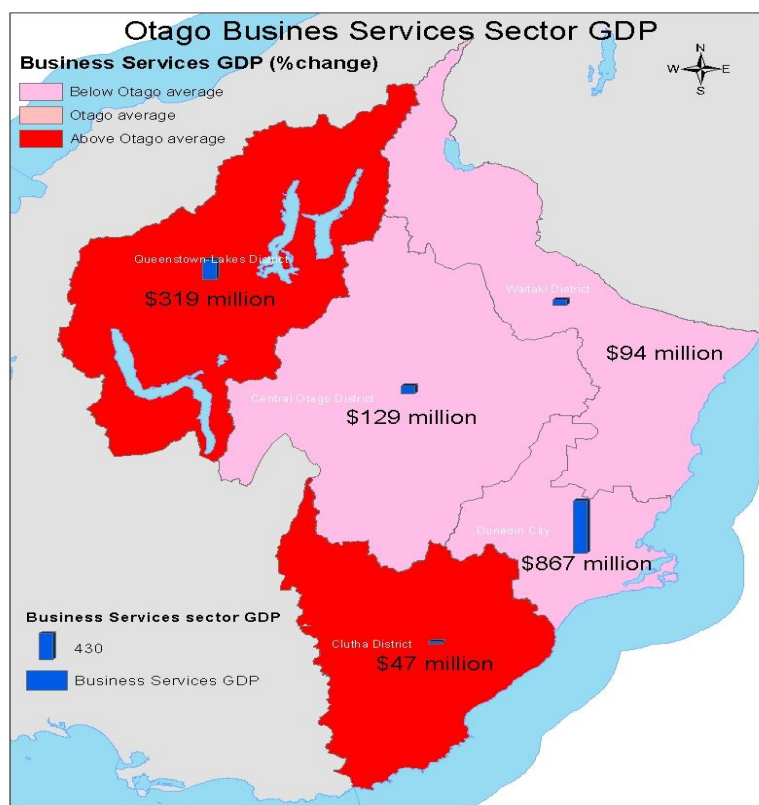
Sectors (2013)	FTEs	%	GDP (2013\$m)	%	Business units	%
Primary	489	3.1%	45	4.0%	323	5.0%
Manufacturing	564	3.6%	72	6.3%	171	2.6%
Construction	1,857	11.8%	124	10.9%	1,030	15.9%
Wholesale and Distribution	943	6.0%	129	11.3%	317	4.9%
Retail Trade and Services	6,399	40.8%	288	25.3%	1,115	17.3%
Business Services	3,029	19.3%	319	27.9%	3,016	46.7%
Arts and Recreation Services	881	5.6%	61	5.4%	231	3.6%
Social Services	1,534	9.8%	102	8.9%	258	4.0%
Sub-total (excluding O.O.D.)	15,695	100.0%	1,141	100.0%	6,461	100.0%
Owner-Occupied Dwellings (O.O.D)*			180			
Total	15,695		1,321		6,461	

* Imputed value, included in Total GDP only

Source: BERL Regional Database, 2013

Figure 6.1 Business services sector GDP, Otago Region, 2013¹⁵

One of the main drivers of growth in the Queenstown Lakes District has been the Business Services sector. Figure 6.1 shows that GDP growth in the Business Services sector in the district was above the regional average in 2013.



¹⁵ Note: 430 bar refers to a scale of \$430 million

6.2 Economic performance – Queenstown Lakes District

Table 6.2 presents the key performance indicators for the Queenstown Lakes District in 2013. It shows that the district's economy performed better than the regional economy in terms of all but one of the indicators. Population, GDP, Employment and Business units growth were all much stronger than in the wider region.

The table also shows that the Queenstown Lakes economy was stronger than the national economy in terms of all the indicators apart per capita GDP growth and Labour productivity growth.

Table 6.2 Key performance indicators, 2013: Queenstown Lakes District

Key Performance Indicators	%pa for 2013 year		
	Queenstown-Lakes District	Otago Region	New Zealand
Resident population growth	3.4	0.9	0.8
GDP growth	5.1	2.4	2.7
GDP per capita growth	1.6	1.4	1.8
Employment growth	2.8	-0.1	0.2
Labour productivity growth	2.5	2.7	2.7
Business units growth	2.3	1.4	0.7
Business size growth	0.5	-1.5	-0.5

Source: BERL Regional Database, 2013

Table 6.3 summarises the 10-year performance indicators for the district, and it confirms that its economic performance in 2013 extended a strong longer-term performance.

Table 6.3 Key performance indicators, Queenstown Lakes District, 2003 to 2013

Key Performance Indicators	%pa for 2003 - 2013		
	Queenstown-Lakes District	Otago Region	New Zealand
Resident population growth	3.8	0.8	0.9
GDP growth	4.3	1.7	2.1
GDP per capita growth	0.5	0.9	1.2
Employment growth	3.6	1.2	1.5
Labour productivity growth	0.6	0.4	0.7
Business units growth	5.2	2.4	1.8
Business size growth	-1.5	-1.1	-0.3

Source: BERL Regional Database, 2013

Between 2003 and 2013, the district's economy performed better than the Otago region economy in terms of all of the indicators shown, with the exception of GDP per capita growth and growth in the average size of business units. Similarly, the table shows that the district economy out-performed the national economy in terms of most of the indicators except GDP per capita, labour productivity and business size growth.

Relatively slow growth in the district's GDP per capita reflects that fact that the population has grown very quickly.

6.3 Fastest growing industries – Queenstown Lakes District

Table 6.4 shows the top 10 fastest growing industries by employment in the district in the ten years to 2013. The industries in the table are generally typical of those that grow rapidly when the population is growing rapidly.

Table 6.4 Ten fastest growing industries by FTE growth, Queenstown Lakes District, 2003 to 2013

Rank by FTE growth	Industry	Employment (FTEs)		
		2003	2013	%pa growth
1	Public Administration	51	239	16.8
2	Machinery and Equipment Wholesaling	29	125	15.7
3	Rental and Hiring Services (except Real Estate)	100	274	10.6
4	Food Product Manufacturing	66	182	10.6
5	Building Cleaning Pest Control and Other Support Services	71	193	10.6
6	Heavy and Civil Engineering Construction	57	130	8.7
7	Professional Scientific and Technical Services (exc Comp Sys Dsn & related)	366	789	8.0
8	Public Order Safety and Regulatory Services	97	203	7.6
9	Finance	106	203	6.7
10	Preschool and School Education	270	513	6.7

Source: BERL, Statistics NZ

Section 8.9 at the end of this report presents data on the employment growth in 86 different industries in the district, and it shows that the large majority of them have grown in the longer-term.

6.4 Key sectors – Queenstown Lakes District

This section presents information on the recent and longer-term contribution of employment, GDP and business units in the six key sectors to the economy of the Queenstown Lakes District.

6.4.1 Tourism sector

Table 6.5 shows the contribution of the Tourism sector to employment, GDP and business units in the district in 2013. Almost a third of employment in the district and a little more than one-fifth of the GDP is accounted for by the sector. This implies that GDP per employee (i.e. productivity) in the sector is relatively low.

The table also illustrates the extreme importance of the sector to the district, in comparison with the importance of the sector to the national economy.

Table 6.5 Tourism sector's contribution to Queenstown Lakes District economy, 2013

Role of tourism in local economy	Employment	%	GDP (\$2013m)	%	Number of Business Units	%
Tourism-characteristic industries	4,426	28.2%	214	16.2%	641	48.5%
Tourism-related industries	470	3.0%	34	2.6%	107	1.7%
All non-tourism-related industries	206	1.3%	22	1.7%	125	1.9%
Queenstown-Lakes	5,102	32.5%	270	20.4%	874	13.5%
New Zealand	100,251	5.3%	7696	3.6%	20,376	4.0%

Source: BERL Regional Database 2013

Table 6.6 shows that employment in Tourism in the district grew more rapidly than employment in the local economy as a whole, both in 2013 and over the longer-term.

Tourism employment increased by 57.9 percent between 2003 and 2013, and its share of all employment in the district increased from 29.3 percent in 2003 to 32.5 percent in 2013.

In other words, at least in terms of employment, the district has become more dependent on Tourism over time.

Table 6.6 Tourism Employment, Queenstown Lakes District, 2003 - 2013

Tourism Employment (FTEs)	Years ending March				%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Tourism-characteristic industries	2,834	3,876	4,227	4,426	4.7	4.6
Tourism-related industries	309	436	447	470	5.0	4.3
All non-tourism-related industries	88	176	195	206	5.9	8.8
Tourism Sector	3,231	4,487	4,869	5,102	4.8	4.7
Total Employment: Queenstown-Lakes	11,027	14,521	15,157	15,695	3.6	3.6

Source: BERL Regional Database 2013

Tourism GDP increased less quickly than total GDP in the district in 2013, but it increased at the same rate as total GDP between 2003 and 2013, as Table 6.7 shows.

The sector's GDP increased by 52.5 percent between 2003 and 2013, and its share of total GDP remained at a fraction more than 20 percent.

Table 6.7 Tourism GDP, Queenstown Lakes District, 2003 - 2013

Tourism GDP (2013\$m)	Years ending March				%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Tourism-characteristic industries	145	193	209	214	2.4	3.9
Tourism-related industries	19	29	32	34	7.8	6.3
All non-tourism-related industries	13	20	20	22	13.4	5.6
Tourism Sector	177	242	260	270	3.9	4.3
Total GDP: Queenstown Lakes	865	1,195	1,259	1,321	5.0	4.3

Source: BERL Regional Database 2013

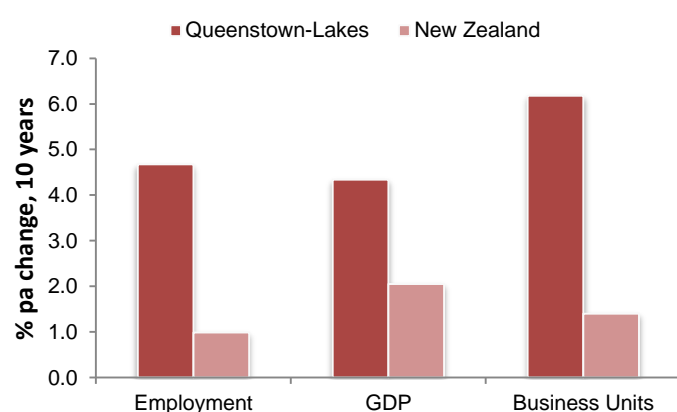
Tourism business units increased more rapidly than the number of business units in the wider district economy, both in 2013 and over the longer term, as Table 6.8 shows.

Table 6.8 Tourism Business Units in Queenstown Lakes District, 2003 - 2013

Tourism Business units	Years ending March				%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Tourism-characteristic industries	385	579	621	641	3.2	5.2
Tourism-related industries	46	100	102	107	5.0	8.9
All non-tourism-related industries	49	112	120	125	3.7	9.8
Tourism Sector	480	791	844	874	3.5	6.2
Total Business Units: Queenstown Lakes	3,903	6,190	6,316	6,461	2.3	5.2

Source: BERL Regional Database 2013

Between 2003 and 2013, the Tourism sector in Queenstown Lakes out-performed the sector nationally in terms of growth in employment, GDP and the number of business units. In terms of GDP alone, Tourism in the district has grown more than twice as fast as it has nationally over the longer-term, as Figure 6.2 shows.

Figure 6.2 Tourism sector growth, Queenstown Lakes District vs. New Zealand, 2003 - 2013

Source: BERL Regional Database 2013

6.4.2 Primary Production sector

The Primary production sector is a relatively small part of the Queenstown Lakes, accounting for a little more than 3 percent of the district's employment and GDP. The sector had a good year in 2013, but it has declined over the longer-term.

Employment in Primary production jumped in 2013, but fell by 21 percent between 2003 and 2013. Most of the reduction in employment over the longer-term has been in the Agriculture industry, but in percentage terms the greatest decline was in Mining and services to mining.

Table 6.9 Primary Production Employment, Queenstown Lakes District, 2003 - 2013

Primary production sector Employment (FTEs)	Year Ending March				%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Agriculture	520	394	380	406	6.8	-2.4
Aquaculture	0	0	0	0	na	na
Services to Agriculture; Hunting and Trapping	67	89	71	76	7.4	1.2
Forestry and Logging	0	0	0	0	na	na
Mining and services to mining	31	23	10	7	-33.6	-14.2
Primary production sector	619	506	461	489	6.0	-2.3
Total employment: Queenstown-Lakes	11,027	14,521	15,272	15,695	2.8	3.6

Source: BERL Regional Database 2013

Table 6.10 shows the recent and longer-term contribution of the Primary production sector GDP to the Queenstown Lakes economy. GDP in the sector jumped in 2013, owing to a good year for the Agriculture industry, but it has fallen slowly over the longer-term. Between 2003 and 2013, GDP in the sector decreased by 6.3 percent and GDP in Agriculture decreased by 11.1 percent.

Table 6.10 Primary Production GDP, Queenstown Lakes District, 2003 - 2013

Primary production sector GDP (2013\$m)	Year ending March				%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Agriculture	36	27	35	40	16.0	1.1
Aquaculture	0	0	0	0	na	na
Services to Agriculture; Hunting and Trapping	5	5	4	4	-4.3	-1.6
Forestry and Logging	0	0	0	0	na	na
Mining and services to mining	7	2	1	0	-29.3	-23.2
Primary production sector	48	34	40	45	13.1	-0.6
Total GDP: Queenstown-Lakes	865	1,187	1,258	1,321	5.1	4.3

Source: BERL Regional Database 2013

The number of Primary production business units decreased, both in the short- and longer-terms, as Table 6.11 shows. However, the decreases were confined to the Agriculture industry.

Table 6.11 Primary Production Business Units, Queenstown Lakes District, 2003 - 2013

Primary production sector Business units	Year ending March				%pa change	
	2003	2011	2012	2013	2011 to 2012	2003 to 2013
Agriculture	270	235	236	221	-6.4	-2.0
Aquaculture	0	1	2	2	0.0	na
Services to Agriculture; Hunting and Trapping	40	56	60	62	3.3	4.5
Forestry and Logging	16	18	21	22	4.8	3.2
Mining and services to mining	8	13	14	16	14.3	7.2
Primary production sector	334	323	333	323	-3.0	-0.3
Total business units: Queenstown-Lakes	3,903	6,190	6,316	6,461	2.3	5.2

Source: BERL Regional Database 2013

Figure 6.3 shows the change in employment, GDP and the number of business units in the Primary production sector in the Queenstown Lakes District and nationally between 2003 and 2013.

The sector performed less well in Queenstown Lakes District than the sector nationally in terms of both employment and GDP.

Figure 6.3 Primary Production sector growth, Queenstown Lakes District vs. New Zealand, 2003 - 2013



Source: BERL Regional Database 2013

6.4.3 Primary Processing sector

The performance of the Primary processing sector in the Queenstown Lakes District is in contrast to the performance of the Primary production sector. The production sector had a good year in 2013 but has declined in the longer-term, whereas the processing sector had a relatively poor year in 2013 but has grown significantly during the past decade.

Table 6.12 shows the recent and longer-term contribution of Primary processing employment to employment in the wider Queenstown Lakes economy. As noted above, 2013 was not a good year for the sector, but it has grown over the longer-term, with employment in the sector increasing by 32.4 percent between 2003 and 2013.

The table also highlights the contrasting fortunes of the two industries that comprise the sector. Over the past ten years, employment in the Food, beverage and tobacco industry increased by 44.3 percent, while employment in the relatively small Wood and paper product manufacturing industry fell by 23.1 percent

Table 6.12 Primary Processing Employment, Queenstown Lakes District, 2003 – 2013

Primary processing sector Employment (FTEs)	Year ending March				%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Food, Beverage and Tobacco	183	178	280	264	-5.6	3.8
Wood and Paper Product Manufacturing	39	32	24	30	21.2	-2.9
Primary processing sector	222	211	304	294	-3.4	2.8
Total employment: Queenstown-Lakes	11,027	14,521	15,272	15,695	2.8	3.6

Source: BERL Regional Database 2013

Primary processing grew by 41.4 percent over the period 2003 to 2013, growing at a slower rate than GDP in the wider Queenstown Lakes economy. The table also confirms the relatively rapid growth in the Food, beverage and tobacco industry and the decline in the Wood and paper product manufacturing industry.

Table 6.13 Primary Processing GDP, Queenstown Lakes District, 2003 - 2013

Primary processing sector GDP (2013\$m)	Year ending March				%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Food, Beverage and Tobacco	24	23	37	36	-2.8	4.3
Wood and Paper Product Manufacturing	5	5	4	5	18.3	-0.8
Primary processing sector	29	29	41	41	-0.6	3.5
Total GDP: Queenstown-Lakes	865	1,187	1,258	1,321	5.1	4.3

Source: BERL Regional Database 2013

The number of business units in the sector grew faster between 2003 and 2013 than either employment or GDP. It also shows that growth in this indicator was especially strong in 2013. The pattern of growth in employment, GDP and business units in the sector may indicate a shift away from industrial-scale production towards more craft based production.

Table 6.14 Primary Processing Business Units, Queenstown Lakes District, 2003 - 2013

Primary processing sector Business units	Year ending March				%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Food, Beverage and Tobacco	22	32	38	46	21.1	7.7
Wood and Paper Product Manufacturing	18	14	15	16	6.7	-1.2
Primary processing sector	40	46	53	62	17.0	4.5
Total business units: Queenstown-Lakes	3,903	6,190	6,316	6,461	2.3	5.2

Source: BERL Regional Database 2013

Although the sector has grown more slowly than the wider Queenstown Lakes economy over the past decade, Figure 6.4 shows Primary processing in the district has out-performed the sector at national level in all three indicators.

Figure 6.4 Primary Processing sector growth, Queenstown Lakes District vs. New Zealand, 2003 – 2013



Source: BERL Regional Database 2013

6.4.4 Creative sector

In 2013, the Creative sector in Queenstown Lakes employed 355 FTEs in 312 business units and contributed \$16 million of GDP to the Queenstown-Lakes District's economy. At only 1.1 FTE per business unit, the average business size is extremely small, suggesting many of the businesses in the sector are one-person operations.

Creative employment fell in 2013, but grew moderately over time. Most of the longer-term growth has occurred in Printing and publishing and Commercial services. Employment in Film, video and TV services has declined slowly.

Between 2003 and 2013, employment in the sector grew by 19.5 percent, but its share of all employment in the district fell from 2.7 percent to 2.3 percent.

Table 6.15 Creative sector Employment, Queenstown Lakes District, 2003 - 2013

Creative sector Employment (FTEs)	Year ending March				%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Printing and publishing	68	119	113	100	-11.6	4.0
Arts and antiques market	3	0	3	3	-1.1	-2.4
Commercial services	68	126	119	128	7.6	6.6
Film, video and television services	86	82	88	78	-11.2	-0.9
Music, creative and performing arts and venues	72	38	56	46	-17.6	-4.4
Creative sector	297	365	379	355	-6.3	1.8
Total employment: Queenstown-Lakes	11,027	14,521	15,272	15,695	2.8	3.6

Source: BERL Regional Database 2013

Despite employment in the sector growing over the longer-term, Table 6.16 indicates that its GDP has fallen marginally.

Table 6.16 Creative sector GDP, Queenstown Lakes District, 2003 - 2013

Creative sector GDP (2013\$ m)	Year ending March				%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Printing and publishing	1	2	2	1	-7.9	4.5
Arts and antiques market	0	0	0	0	5.8	2.2
Commercial services	2	4	4	5	12.8	7.4
Film, video and television services	7	6	6	5	-14.4	-2.0
Music, creative and performing arts and venues	6	2	4	4	-12.5	-4.4
Creative sector	16	14	16	16	-5.9	-0.1
Total GDP: Queenstown-Lakes	865	1,187	1,258	1,321	5.1	4.3

Source: BERL Regional Database 2013

The number of business units in the sector has grown even faster than employment in the sector over the longer-term, as Table 6.17 shows.

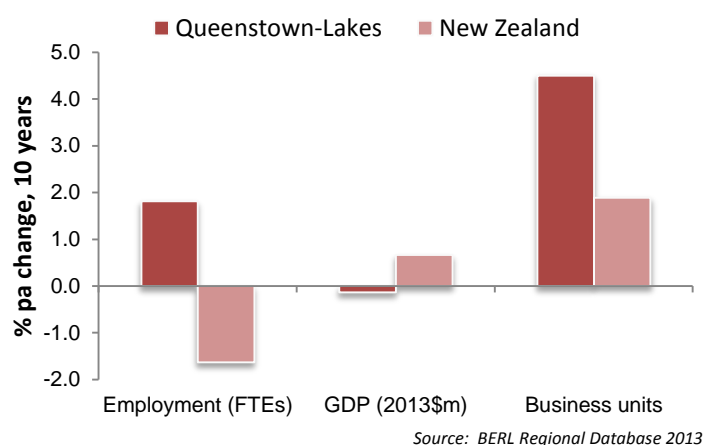
Table 6.17 Creative sector Business Units, Queenstown Lakes District, 2003 - 2013

Creative sector Business units	Year ending March				%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Printing and publishing	17	25	25	25	0.0	3.9
Arts and antiques market	6	3	8	7	-12.5	1.6
Commercial services	73	116	126	132	4.8	6.1
Film, video and television services	56	73	66	72	9.1	2.5
Music, creative and performing arts and venues	49	75	73	76	4.1	4.5
Creative sector	201	292	298	312	4.7	4.5
Total business units: Queenstown-Lakes	3,903	6,190	6,316	6,461	2.3	5.2

Source: BERL Regional Database 2013

Figure 6.5 indicates that, compared to the sector nationally, the Creative sector in Queenstown Lakes District has followed a growth path at odds with the national picture. Between 2003 and 2013, employment in the creative sector in the district grew, while GDP fell. By contrast, employment in the sector at national level decreased, while GDP increased.

Figure 6.5 Creative sector growth, Queenstown Lakes District vs. New Zealand, 2003 - 2013



6.4.5 Education & Research sector

As might be expected in a district where the population has grown relatively rapidly, the Education and research sector in Queenstown Lakes has expanded very fast. Indeed, measured in terms of employment the sector doubled in size between 2003 and 2013.

Table 6.18 shows the recent and longer-term contribution of the Education & research sector to employment in the Queenstown Lakes economy. As noted above, employment in the sector doubled between 2003 and 2013. Over the same period, the sector's share of total employment in the district increased from 2.9 percent to 4.1 percent.

The table also indicates that employment has grown over the longer-term in each industry within the sector.

Table 6.18 Education & Research Employment, Queenstown Lakes District, 2003 - 2013

Education & Research Sector Employment (FTEs)	Year ending March				%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Preschool Education	56	158	157	166	5.7	11.5
Primary and Secondary Education	214	306	333	348	4.3	5.0
Higher Education	0	52	73	58	-20.0	na
Other Education	49	84	59	53	-8.9	0.8
Scientific Research	5	9	14	24	66.0	16.2
Education & Research sector	324	608	636	649	2.0	7.2
Total employment: Queenstown-Lakes	11,027	14,521	15,272	15,695	2.8	3.6

Source: BERL Regional Database 2013

Table 6.19 indicates that growth in education and research GDP has followed a similar pattern to employment growth.

Table 6.19 Education & Research GDP, Queenstown Lakes District, 2003 - 2013

Education & Research Sector GDP (2013\$m)	Year ending March				%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Preschool Education	3	8	8	8	6.2	10.5
Primary and Secondary Education	12	15	17	17	4.8	4.0
Higher Education	0	3	4	3	-19.6	na
Other Education	3	4	3	3	-8.5	-0.2
Scientific Research	1	1	1	2	65.5	14.6
Education & Research sector	18	30	32	33	3.7	6.3
Total GDP: Queenstown-Lakes	865	1,187	1,258	1,321	5.1	4.3

Source: BERL Regional Database 2013

The number of business units, or establishments, in the sector grew from a total of 47 in 2003 to 76 in 2013. It is noteworthy that Higher education has become established in the district.

Table 6.20 Education & Research Business Units, Queenstown Lakes District, 2003 - 2013

Education & Research Sector Business units	Year ending March				%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Preschool Education	10	16	17	18	5.9	6.1
Primary and Secondary Education	11	13	14	14	0.0	2.4
Higher Education	0	6	10	7	-30.0	na
Other Education	18	28	25	27	8.0	4.1
Scientific Research	8	7	6	10	66.7	2.3
Education & Research sector	47	70	72	76	5.6	4.9
Total business units: Queenstown-Lakes	3,903	6,190	6,316	6,461	2.3	5.2

Source: BERL Regional Database 2013

Unsurprisingly, Figure 6.6 shows that, over the past ten years, the Education and research sector in Queenstown Lakes District has grown more rapidly than the sector at national level in terms of all three indicators examined.

Figure 6.6 Education & Research sector growth, Queenstown Lakes District vs. New Zealand, 2003 - 2013

Source: BERL Regional Database 2013

6.4.6 Engineering, Machinery & Equipment Manufacturing

The Engineering, machinery & equipment manufacturing sector in Queenstown Lakes is very small, accounting for around one percent of all activity. However, it has grown more rapidly than the wider local economy during the past ten years.

The number of FTE jobs in the sector jumped in 2013, as Table 6.21 shows. It also implies that employment in the sector increased by 120 percent between 2003 and 2013 with most of the employment growth came from the Consultant engineering services industry.

Table 6.21 Engineering, Machinery & Equipment Manufacturing Employment, Queenstown Lakes District, 2003 - 2013

Engineering, Machinery & Equipment manufacturing sector Employment (FTEs)	Year ending March				%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Machinery and Equipment Manufacturing	36	26	30	41	37.9	1.4
Consultant Engineering Services	31	87	91	104	15.3	13.0
Engineering, Machinery & Equipment manufacturing sector	66	113	120	145	20.9	8.2
Total Employment: Queenstown	11,027	14,521	15,272	15,695	2.8	3.6

Source: BERL Regional Database 2013

Table 6.22 indicates that GDP in the sector grew at broadly the same rate as employment, both in the short- and longer-terms.

Table 6.22 Engineering, Machinery & Equipment Manufacturing GDP, Queenstown Lakes District, 2003 - 2013

Engineering, Machinery & Equipment manufacturing sector GDP (2013\$m)	Year ending March				%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Machinery and Equipment Manufacturing	3	2	3	4	40.9	3.2
Consultant Engineering Services	3	8	9	10	14.9	11.4
Engineering, Machinery & Equipment manufacturing sector	6	10	11	14	21.7	8.2
Total GDP: Queenstown	865	1,187	1,258	1,321	5.1	4.3

Source: BERL Regional Database 2013

Table 6.23 also reflects a sector that has grown rapidly. Between 2003 and 2013, the number of business units in the sector in the district increased by 70 percent. However, most of this growth came from the Consultant engineering services industry.

Table 6.23 Engineering, Machinery & Equipment Manufacturing Business Units, Queenstown Lakes, 2003 - 2013

Engineering, Machinery & Equipment manufacturing sector Business units	Year ending March				%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Machinery and Equipment Manufacturing	17	19	19	19	0.0	1.1
Consultant Engineering Services	33	55	60	66	10.0	7.2
Engineering, Machinery & Equipment manufacturing sector	50	74	79	85	7.6	5.4
Total Business units: Queenstown	3,903	6,190	6,316	6,461	2.3	5.2

Source: BERL Regional Database 2013

Over the longer-term, the Engineering, manufacturing and equipment manufacturing sector in Queenstown Lakes outperformed its counterpart nationally in terms of all three indicators. In fact, both employment and GDP growth in the sector in the district were more than twice the national growth rate.

Figure 6.7 Engineering, Machinery & Equipment Manufacturing sector growth, Queenstown Lakes District vs. New Zealand, 2003 - 2013



Source: BERL Regional Database 2013

6.4.7 ICT sector

ICT in Queenstown Lakes District is another sector that accounts for around one percent of activity, but it is also another sector that has grown rapidly, at least in terms of employment.

Employment in the sector increased by 182 percent between 2003 and 2013, and its share of total employment in the district increased from 0.5 percent in 2003 to 1.0 percent in 2013, as Table 6.24 shows.

Table 6.24 ICT Employment, Queenstown Lakes, 2003 - 2013

ICT sector Employment (FTEs)	Year ending March				%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Manufacturing	0	0	0	0	na	na
Wholesaling	26	45	63	76	21.8	11.3
Telecommunication services	3	9	3	0	-100.0	-100.0
Commercial services	28	68	64	85	31.8	11.5
ICT sector	57	123	130	161	23.8	10.9
Total employment: Queenstown-Lakes	11,027	14,521	15,272	15,695	2.8	3.6

Source: BERL Regional Database 2013

Table 6.25 shows that, despite the significant increase in employment, GDP in the sector actually decreased between 2003 and 2013.

Table 6.25 ICT GDP, Queenstown Lakes, 2003 - 2013

ICT sector GDP (2013\$m)	Year ending March				%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Manufacturing	0	0	0	0	na	na
Wholesaling	3	5	7	9	23.3	12.0
Telecommunication services	3	10	3	0	-100.0	-100.0
Commercial services	20	15	12	14	14.6	-3.6
ICT sector	26	31	23	23	1.5	-1.1
Total GDP: Queenstown-Lakes	865	1,187	1,258	1,321	5.1	4.3

Source: BERL Regional Database 2013

Table 6.26 shows the number of business units in the sector has increased considerably over time. The increase during the period 2003-2013 was broadly in line with the increase in employment.

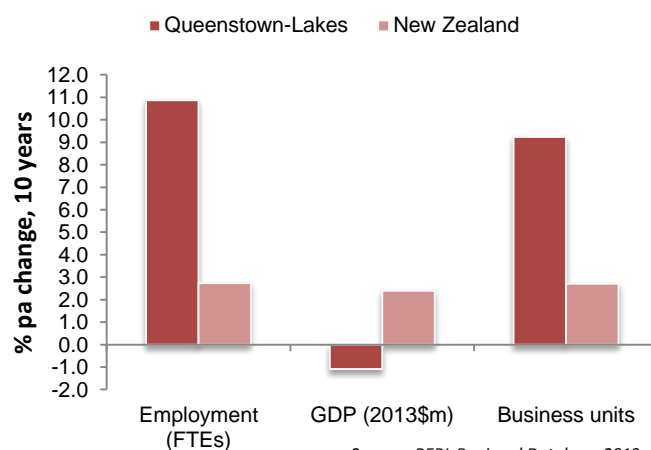
Table 6.26 ICT Business Units, Queenstown Lakes, 2003 - 2013

ICT sector Business units	Year ending March				%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Manufacturing	3	1	1	1	0.0	-10.4
Wholesaling	12	13	12	13	8.3	0.8
Telecommunication services	3	3	3	3	0.0	0.0
Commercial services	20	66	78	75	-3.8	14.1
ICT sector	38	83	94	92	-2.1	9.2
Total business units: Queenstown-Lakes	3,903	6,190	6,316	6,461	2.3	5.2

Source: BERL Regional Database 2013

Figure 6.8 shows the change in employment, GDP and business units in the ICT sector in Dunedin City and nationally between 2003 and 2013.

Figure 6.8 ICT sector growth, Queenstown Lakes vs. New Zealand, 2003 - 2013



Source: BERL Regional Database 2013

7 Waitaki District

7.1 Economy – Waitaki District

The economy in the Waitaki District generates for 9608 FTE jobs in 2,884 business units. The economy's GDP is fractionally over \$1.0 billion.

As Table 7.1 shows, around 45 percent of employment and 53 percent of GDP in Waitaki is in the Primary and Manufacturing sectors.

Table 7.1 GDP, employment and business units, Waitaki District, 2013

Sectors (2013)	FTEs	%	GDP (2013\$m)	%	Business units	%
Primary	2,359	24.6%	210	24.0%	1,039	36.0%
Manufacturing	1,916	19.9%	253	28.9%	91	3.2%
Construction	750	7.8%	50	5.7%	234	8.1%
Wholesale and Distribution	553	5.8%	71	8.1%	137	4.8%
Retail Trade and Services	1,593	16.6%	89	10.2%	399	13.8%
Business Services	799	8.3%	94	10.8%	776	26.9%
Arts and Recreation Services	97	1.0%	7	0.8%	56	1.9%
Social Services	1,542	16.1%	100	11.5%	152	5.3%
Sub-total (excluding O.O.D.)	9,608	100.0%	874	100.0%	2,884	100.0%
Owner-Occupied Dwellings (O.O.D.)*			133			
Total	9,608		1,007		2,884	

* Imputed value, included in Total GDP only

Source: BERL Regional Database, 2013

Figure 7.1 Manufacturing sector GDP, Otago Region, 2013¹⁶

In terms of its share of total economic activity, Manufacturing is more important to Waitaki than it is to any of the other territorial authorities in Otago. However, employment in the sector has declined over time and its GDP has grown relatively slowly. 2013 was a difficult year for the sector.

Further information on the trends for the various industries within Manufacturing in Waitaki can be found in Section 8.10 at the end of this report.



¹⁶ Note: 270 bar refers to a scale of \$270 million

7.2 Economic performance – Waitaki District

Table 7.2 indicates that 2013 was a difficult year for the Waitaki economy as a whole. It performed less well than Otago in terms of all the indicators shown, and it performed less well than the national economy in terms of all but one indicator.

Table 7.2 Key performance indicators, Waitaki District, 2013

Key Performance Indicators	%pa for 2013 year		
	Waitaki District	Otago Region	New Zealand
Resident population growth	0.5	0.9	0.8
GDP growth	-3.0	2.4	2.7
GDP per capita growth	-3.4	1.4	1.8
Employment growth	-4.4	-0.1	0.2
Labour productivity growth	1.0	2.7	2.7
Business units growth	0.9	1.4	0.7
Business size growth	-5.3	-1.5	-0.5

Source: BERL Regional Database, 2013

Table 7.3 shows the 10-year performance of key indicators in the Waitaki District compared to the regional and national indicators and it paints a much brighter picture. Over the longer term, the Waitaki economy has out-performed the Otago economy in terms of most of the indicators, and it has performed more-or-less as well as the national economy.

Table 7.3 10-year Key performance indicators, Waitaki District, 2003 to 2013

Key Performance Indicators	%pa for 2003 - 2013		
	Waitaki District	Otago Region	New Zealand
Resident population growth	0.3	0.8	0.9
GDP growth	2.0	1.7	2.1
GDP per capita growth	1.6	0.9	1.2
Employment growth	1.4	1.2	1.5
Labour productivity growth	0.7	0.4	0.7
Business units growth	1.3	2.4	1.8
Business size growth	0.1	-1.1	-0.3

Source: BERL Regional Database, 2013

7.3 Fastest growing industries in Waitaki District

Table 7.4 shows the 10 fastest growing industries in the Waitaki District between 2003 and 2013, measured in terms of employment growth; and it includes a diverse range.

Data showing the longer-term change in employment, GDP and the number of business units for 86 different industries can be found in Section 8.10.

Table 7.4 Ten fastest growing industries by FTE growth, Waitaki District, 2003 to 2013

Rank by FTE growth	Industry	Employment (FTEs)		
		2003	2013	%pa growth
1	Social Assistance Services	56	207	13.9
2	Metal Ore Mining	248	536	8.0
3	Basic Material Wholesaling	70	142	7.3
4	Professional Scientific and Technical Services (exc Comp Sys Dsn & related)	159	271	5.5
5	Public Administration	65	107	5.2
6	Construction Services	233	376	4.9
7	Administrative Services	82	120	3.8
8	Hospitals	109	155	3.6
9	Repair and Maintenance	82	114	3.4
10	Agriculture Forestry and Fishing Support Services	169	220	2.7

Source: BERL, Statistics NZ

7.4 Key sectors – Waitaki District

This section presents the recent and longer-term change in employment, GDP and the number of business units in the six key sectors in the Waitaki District. However, we start with some additional data on trends in dairy and sheep farming.

7.4.1 Dairy and Sheep

Table 7.5 summarises five indicators relating to dairy and sheep farming in the Waitaki District and New Zealand for the last seven years. Dairy farming has grown considerably faster in Waitaki than it has nationally. There has been a corresponding decline in sheep farming over the same period, and the Waitaki trend is similar to the national trend in this respect.

Table 7.5 Summary of dairy and sheep statistics, Waitaki District, 2005 to 2013

Dairy and Sheep	2007	2008	2009	2010	2011	2012	2013	%pa change	
								2012 to 2013	2007 to 2013
number of dairy herds									
Waitaki District	94	98	105	112	119	125	127	1.6	5.1
New Zealand	11,630	11,436	11,618	11,691	11,735	11,798	11,891	0.8	0.4
total cows ('000)									
Waitaki District	57.0	62.7	66.9	73.4	81.8	90.3	95.9	6.3	9.1
New Zealand	3,916.8	4,012.9	4,252.9	4,396.7	4,528.7	4,634.2	4,784.3	3.2	3.4
total effective dairy ha ('000)									
Waitaki District	19.1	20.3	21.2	23.3	25.1	26.9	26.7	-0.8	5.7
New Zealand	1,412.9	1,436.5	1,519.1	1,563.5	1,638.7	1,638.5	1,677.4	2.4	2.9
average kilograms of milk solids per ha									
Waitaki/ Central Otago District	1,165	1,192	1,192	959	1,125	1,292	1,317	1.9	2.1
New Zealand	934	873	921	912	923	1,028	988	-3.9	0.9
total sheep ('000)									
Waitaki District	978	942	907	873	840	809	800	-1.1	-3.3
New Zealand	38,461	34,088	32,384	32,563	31,132	31,263	30,905	-1.1	-3.6

* Milk solids per hectare were first released for Waitaki District in 2008/09. Previous years use an aggregated number for Waitaki/Central Otago District. There is approximately a 90-10 split between cows in Waitaki and Central Otago, so average milk solids should be broadly accurate for Waitaki. Total sheep numbers for the year 2007 and 2012 were sourced from the Agricultural Census while the per annum average over the five years between the two surveys was used to produce the total for 2008, 2009, 2010 and 2011. The total number for 2013 was produced by assuming that the ratio between the total number of sheep in Waitaki and New Zealand did not change.

Source: Livestock Improvement Corporation, Beef + Lamb NZ

7.4.2 Tourism sector

Table 7.6 shows that Tourism is more important to the Waitaki economy than it is to the national economy in terms of all three measures.

Table 7.6 Tourism sector's contribution to Waitaki District's local economy, 2013

Role of tourism in local economy	Employment		GDP (\$2013m)		Number of Business Units	
		%		%		%
Tourism-characteristic industries	441	4.6%	18	1.8%	124	12.3%
Tourism-related industries	149	1.5%	11	1.1%	29	1.0%
All non-tourism-related industries	142	1.5%	16	1.6%	43	1.5%
Waitaki	731	7.6%	45	4.5%	196	6.8%
New Zealand	100,251	5.3%	7696	3.6%	20,376	4.0%

Source: BERL Regional Database 2013

Tourism in Waitaki has grown strongly, in both the short- and longer-terms and employment in the sector has grown more quickly than employment in the wider district economy, as Table 7.7 shows.

Between 2003 and 2013, employment in the sector increased by 43.9 percent and its share of total Waitaki employment increased from 5.8 percent in 2003 to 7.6 percent in 2013.

Table 7.7 Tourism Employment, Waitaki District, 2003 - 2013

Tourism Employment (FTEs)	Years ending March				%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Tourism-characteristic industries	311	437	419	441	5.2	3.5
Tourism-related industries	103	143	138	149	8.0	3.7
All non-tourism-related industries	68	130	139	142	2.0	7.6
Tourism Sector	483	710	695	731	5.1	4.2
Total Employment: Waitaki	8,365	9,841	10,065	9,608	-4.4	1.4

Source: BERL Regional Database 2013

Table 7.8 shows changes in tourism GDP in Waitaki and it confirms that the sector has sustained relatively rapid growth.

Table 7.8 Tourism GDP, Waitaki District, 2003 - 2013

Tourism GDP (2013\$m)	Years ending March				%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Tourism-characteristic industries	15	19	18	18	3.2	1.7
Tourism-related industries	6	10	10	11	10.8	5.7
All non-tourism-related industries	10	14	15	16	9.3	4.6
Tourism Sector	32	42	42	45	7.1	3.6
Total GDP: Waitaki	829	966	1,036	1,007	-3.0	2.0

Source: BERL Regional Database 2013

Table 7.9 paints a broadly similar picture to the previous two tables, underlining the dynamism of the Tourism sector in the district.

Table 7.9 Tourism Business Units, Waitaki District, 2003 - 2013

Tourism Business units	Years ending March				%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Tourism-characteristic industries	75	120	122	124	2.3	5.2
Tourism-related industries	17	28	27	29	9.0	5.6
All non-tourism-related industries	22	37	39	43	9.0	6.8
Tourism Sector	114	184	188	196	4.7	5.6
Total Business Units: Waitaki	2,545	2,833	2,858	2,884	0.9	1.3

Source: BERL Regional Database 2013

Figure 7.2 shows that the Tourism sector in Waitaki has out-performed the sector nationally in terms of employment, GDP and business units growth between 2003 and 2013.

Figure 7.2 Tourism sector growth, Waitaki District vs. New Zealand, 2003 - 2013



Source: BERL Regional Database 2013

7.4.3 Primary Production sector

Table 7.5 above focused narrowly on the dairy and sheep industries in Waitaki. This section looks more widely at the Primary production sector.

Table 7.10 indicates that the sector had a disappointing year in 2013 in terms of employment, but that it has grown significantly over the longer-term. Employment in the sector has grown more rapidly than employment in the Waitaki economy as a whole growing by 28.1 percent over the 10 years. Its share of total Waitaki employment increased from 22.0 percent in 2003 to 24.6 percent in 2013.

Around two-thirds of Primary production employment is in Agriculture, but employment in the two smaller industries of Services to agriculture and Mining and services to mining have grown more rapidly over the longer-term.

Table 7.10 Primary Production Employment, Waitaki District, 2003 - 2013

Primary production sector Employment (FTEs)	Year Ending March				%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Agriculture	1,355	1,505	1,647	1,543	-6.3	1.3
Aquaculture	0	10	10	10	-0.4	na
Services to Agriculture; Hunting and Trapping	179	208	206	228	10.6	2.5
Forestry and Logging	3	6	3	3	-0.9	0.4
Mining and services to mining	305	559	555	575	3.6	6.6
Primary production sector	1,841	2,289	2,421	2,359	-2.6	2.5
Total employment: Waitaki	8,365	9,841	10,052	9,608	-4.4	1.4

Source: BERL Regional Database 2013

Table 7.11 shows the recent and longer-term contribution of Primary production GDP to the Waitaki economy. The sector performed well in 2013 on this measure, but longer-term GDP growth has been more-or-less in line with GDP growth in the wider economy. It also underlines the longer-term strength of the Agriculture industry.

Table 7.11 Primary Production GDP, Waitaki District, 2003 - 2013

Primary production sector GDP (2013\$m)	Year ending March				%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Agriculture	94	105	151	154	1.8	5.0
Aquaculture	0	1	1	1	-11.3	na
Services to Agriculture; Hunting and Trapping	13	11	13	12	-1.4	-0.4
Forestry and Logging	1	3	1	2	6.2	4.8
Mining and services to mining	66	48	37	41	10.3	-4.6
Primary production sector	174	168	203	210	3.2	1.9
Total GDP: Waitaki	829	966	1,038	1,007	-3.0	2.0

Source: BERL Regional Database 2013

Table 7.12 indicates that the number of business units in the sector has been in slow decline for the past ten years, and the decline has affected all industries within the sector apart from the nascent Aquaculture industry.

Table 7.12 Primary Production Business Units, Waitaki District, 2003 - 2013

Primary production sector Business units	Year ending March				%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Agriculture	905	865	896	887	-1.0	-0.2
Aquaculture	1	2	2	2	0.0	7.2
Services to Agriculture; Hunting and Trapping	95	82	81	91	12.3	-0.4
Forestry and Logging	68	53	54	53	-1.9	-2.5
Mining and services to mining	8	5	6	6	0.0	-2.8
Primary production sector	1,077	1,007	1,039	1,039	0.0	-0.4
Total business units: Waitaki	2,545	2,833	2,858	2,884	0.9	1.3

Source: BERL Regional Database 2013

Figure 7.3 shows the change in employment, GDP and business units in the Primary production sector in Waitaki and nationally between 2003 and 2013. Most notably, it shows that Primary production employment growth in the district was rapid, compared to national employment growth in the sector, but GDP growth lagged slightly.

Figure 7.3 Primary Production sector growth, Waitaki District vs. New Zealand, 2003 - 2013

Source: BERL Regional Database 2013

7.4.4 Primary Processing sector

The data on employment and GDP in the Primary processing sector in Waitaki suggest that 2012 was a good year, followed by a poor year in 2013. However, it may be that the underlying data for 2012 was unreliable, since the 2013 data appear to be in line with the 2011 data.

Table 7.13 indicates that employment in the sector grew slowly over the longer-term, but it also implies that the sector's share of total employment in Waitaki declined. Employment in Food, beverage and tobacco has increased moderately over time, while employment in Wood and paper product manufacturing has decreased.

Table 7.13 Primary Processing Employment, Waitaki District, 2003 - 2013

Primary processing sector Employment (FTEs)	Year ending March				%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Food, Beverage and Tobacco	1,297	1,478	1,781	1,428	-19.8	1.0
Wood and Paper Product Manufacturing	84	76	69	74	7.2	-1.3
Primary processing sector	1,381	1,554	1,850	1,502	-18.8	0.8
Total employment: Waitaki	8,365	9,841	10,052	9,608	-4.4	1.4

Source: BERL Regional Database 2013

Longer-term growth in GDP in Primary processing, and in its component industries, has been slightly faster than the longer-term growth in employment. This is to be expected, given productivity growth in this sector.

Table 7.14 Primary Processing GDP, Waitaki District, 2003 - 2013

Primary processing sector GDP (2013\$m)	Year ending March				%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Food, Beverage and Tobacco	169	194	236	195	-17.4	1.5
Wood and Paper Product Manufacturing	12	13	12	13	4.6	0.8
Primary processing sector	180	207	248	207	-16.4	1.4
Total GDP: Waitaki	829	966	1,038	1,007	-3.0	2.0

Source: BERL Regional Database 2013

Table 7.15 indicates that the number of business units in the sector has been stable over the past decade.

Table 7.15 Primary Processing Business Units, Waitaki District, 2003 - 2013

Primary processing sector Business units	Year ending March				%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Food, Beverage and Tobacco	17	19	17	17	0.0	0.0
Wood and Paper Product Manufacturing	14	17	15	15	0.0	0.7
Primary processing sector	31	36	32	32	0.0	0.3
Total business units: Waitaki	2,545	2,833	2,858	2,884	0.9	1.3

Source: BERL Regional Database 2013

Figure 7.4 shows that, in terms of employment and GDP, Primary processing in Waitaki outperformed its counterpart nationally over the past decade.

Figure 7.4 Primary Processing sector growth, Waitaki District vs. New Zealand, 2003 - 2013

7.4.5 Creative sector

The Creative sector in Waitaki is very small, accounting for 1.4 percent of all FTE jobs, but only 0.3 percent of GDP in the district. Nonetheless, it has grown over the longer-term, at least in terms of employment and the number of business units.

Table 7.16 indicates that the sector's employment grew by nearly 40 percent between 2003 and 2013, with most of the growth occurring in the Printing and publishing industry.

Table 7.16 Creative sector Employment, Waitaki District, 2003 - 2013

Creative sector Employment (FTEs)	Year ending March				%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Printing and publishing	61	106	99	104	5.3	5.5
Arts and antiques market	13	0	0	0	na	-100.0
Commercial services	5	12	9	11	32.8	8.0
Film, video and television services	17	21	22	13	-41.9	-2.9
Music, creative and performing arts and venues	5	14	11	11	-4.4	7.2
Creative sector	101	153	141	139	-1.2	3.2
Total employment: Waitaki	8,365	9,841	10,052	9,608	-4.4	1.4

Source: BERL Regional Database 2013

Table 7.17 suggests that GDP in the sector fell sharply in 2013 and that it was more or less static over the longer-term.

Table 7.17 Creative sector GDP, Waitaki District, 2003 - 2013

Creative sector GDP (2013\$ m)	Year ending March				%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Printing and publishing	0	1	0	1	55.5	3.8
Arts and antiques market	1	0	0	0	na	-100.0
Commercial services	0	1	1	1	2.5	11.6
Film, video and television services	1	1	2	1	-44.0	-3.9
Music, creative and performing arts and venues	1	1	1	1	-9.2	5.0
Creative sector	3	4	4	3	-15.2	0.1
Total GDP: Waitaki	829	966	1,038	1,007	-3.0	2.0

Source: BERL Regional Database 2013

However, Table 7.18 shows that there was healthy growth in the number of business units in the sector between 2003 and 2013.

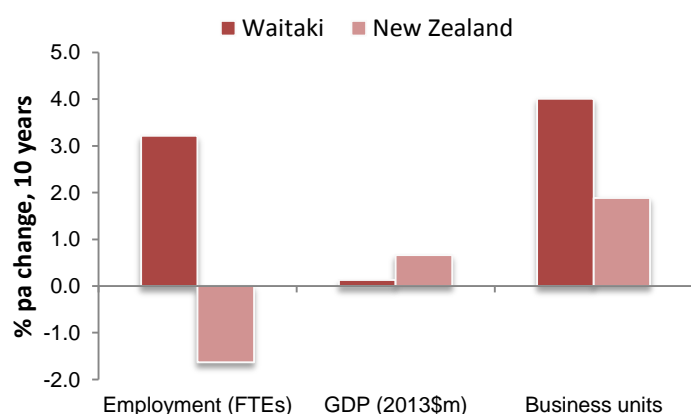
Table 7.18 Creative sector Business Units, Waitaki District, 2003 - 2013

Creative sector Business units	Year ending March				%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Printing and publishing	5	9	10	9	-10.0	6.1
Arts and antiques market	7	4	4	7	75.0	0.0
Commercial services	7	11	11	11	0.0	4.6
Film, video and television services	4	5	5	4	-20.0	0.0
Music, creative and performing arts and venues	4	11	9	9	0.0	8.4
Creative sector	27	40	39	40	2.6	4.0
Total business units: Waitaki	2,545	2,833	2,858	2,884	0.9	1.3

Source: BERL Regional Database 2013

Figure 7.5 shows that, in terms of employment, the sector in Waitaki grew more rapidly than the sector nationally over the longer-term. However, the opposite as true for GDP growth.

Figure 7.5 Creative sector growth, Waitaki District vs. New Zealand, 2003 - 2013



Source: BERL Regional Database 2013

7.4.6 Education & Research sector

The Education & research sector in Waitaki accounts for almost 6 percent of total employment in the district. However, when compared to other parts of Otago, growth in Education and research has been slow. Primary and secondary education dominates the sector, although Higher education and Preschool education have grown relatively rapidly.

Table 7.19 indicates that employment in the sector increased by just 2.6 percent overall between 2003 and 2013. Employment in the Waitaki economy as a whole grew by 14.9 percent over the same period.

Table 7.19 Education & Research Employment, Waitaki District, 2003 - 2013

Education & Research Sector Employment (FTEs)	Year ending March				%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Preschool Education	28	57	57	57	0.1	7.4
Primary and Secondary Education	453	437	432	445	3.1	-0.2
Higher Education	5	11	14	11	-20.6	7.9
Other Education	16	34	15	15	4.3	-0.6
Scientific Research	32	68	24	19	-20.3	-5.0
Education & Research sector	534	607	541	548	1.2	0.3
Total employment: Waitaki	8,365	9,841	10,052	9,608	-4.4	1.4

Source: BERL Regional Database 2013

Table 7.20 indicates that GDP in the sector actually declined a little between 2003 and 2013.

Table 7.20 Education & Research GDP, Waitaki District, 2003 - 2013

Education & Research Sector GDP (2013\$m)	Year ending March				%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Preschool Education	2	3	3	3	0.6	6.4
Primary and Secondary Education	25	21	21	22	3.6	-1.1
Higher Education	0	1	1	1	-20.2	6.9
Other Education	1	2	1	1	4.8	-1.6
Scientific Research	3	6	2	2	-20.6	-6.3
Education & Research sector	31	32	28	28	0.8	-0.9
Total GDP: Waitaki	829	966	1,038	1,007	-3.0	2.0

Source: BERL Regional Database 2013

The number of business/activity units in the Education and research sector fell between 2003 and 2013, as Table 7.21 shows. Perhaps of greatest concern is that the fall included a reduction in the number of Scientific research establishments.

Table 7.21 Education & Research Business Units, Waitaki District, 2003 - 2013

Education & Research Sector Business units	Year ending March				%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Preschool Education	12	12	12	12	0.0	0.0
Primary and Secondary Education	27	23	24	24	0.0	-1.2
Higher Education	1	1	1	1	0.0	0.0
Other Education	8	9	9	7	-22.2	-1.3
Scientific Research	6	7	7	4	-42.9	-4.0
Education & Research sector	54	52	53	48	-9.4	-1.2
Total business units: Waitaki	2,545	2,833	2,858	2,884	0.9	1.3

Source: BERL Regional Database 2013

Figure 7.6 shows that the sector in Waitaki performed less well than the sector nationally in terms of all three measures.

Figure 7.6 Education & Research sector growth, Waitaki District vs. New Zealand, 2003 - 2013



Source: BERL Regional Database 2013

7.4.7 Engineering, Machinery & Equipment Manufacturing

Waitaki's Engineering, machinery & equipment manufacturing sector is relatively small, employing 58 FTEs in 25 business units and generating \$5 million in GDP in 2013.

However, despite a difficult year in 2013, the sector is growing. Within the district, only one industry – Machinery and equipment manufacturing – is active.

Table 7.22 indicates that employment in the sector almost doubled between 2003 and 2013. During this time, its share of total employment increased from 0.4 percent in 2003 to 0.6 percent in 2013.

Table 7.22 Engineering, Machinery & Equipment Manufacturing Employment, Waitaki District, 2003 - 2013

Engineering, Machinery & Equipment manufacturing sector Employment (FTEs)	Year ending March				%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Machinery and Equipment Manufacturing	28	65	66	58	-12.2	7.7
Consultant Engineering Services	3	0	0	0	na	-100.0
Engineering, Machinery & Equipment manufacturing sector	30	65	66	58	-12.2	6.7
Total Employment: Waitaki	8,365	9,841	10,052	9,608	-4.4	1.4

Source: BERL Regional Database 2013

Table 7.23 shows a similar pattern of short-term decline but long-term increase in the sector's GDP.

Table 7.23 Engineering, Machinery & Equipment Manufacturing GDP, Waitaki District, 2003 - 2013

Engineering, Machinery & Equipment manufacturing sector GDP (2013\$m)	Year ending March				%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Machinery and Equipment Manufacturing	2	6	6	5	-12.9	8.6
Consultant Engineering Services	0	0	0	0	na	-100.0
Engineering, Machinery & Equipment manufacturing sector	3	6	6	5	-12.9	7.4
Total GDP: Waitaki	829	966	1,038	1,007	-3.0	2.0

Source: BERL Regional Database 2013

Table 7.24 shows that the number of business units in the sector has grown over the longer-term.

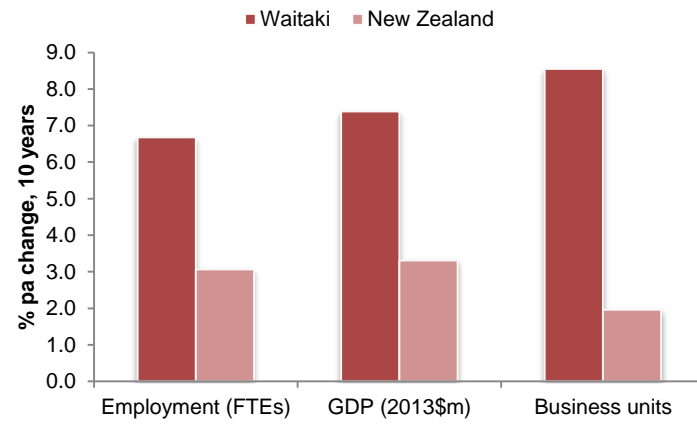
Table 7.24 Engineering, Machinery & Equipment Manufacturing Business Units, Waitaki District, 2003 - 2013

Engineering, Machinery & Equipment manufacturing sector Business units	Year ending March				%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Machinery and Equipment Manufacturing	6	14	15	15	0.0	9.6
Consultant Engineering Services	5	8	9	10	11.1	7.2
Engineering, Machinery & Equipment manufacturing sector	11	22	24	25	4.2	8.6
Total Business units: Waitaki	2,545	2,833	2,858	2,884	0.9	1.3

Source: BERL Regional Database 2013

Figure 7.7 shows that employment, GDP and the number of business units in the sector in Waitaki grew more significantly more quickly than nationally between 2003 and 2013.

Figure 7.7 Engineering, Machinery & Equipment Manufacturing sector growth, Waitaki District vs. New Zealand, 2003 - 2013



Source: BERL Regional Database 2013

8 Technical appendices

8.1 Data sources and terminology

This profile uses official statistics of employment and activity units from Statistics New Zealand's Business Demographics Statistics (BDS) database, and an associated database developed by BERL to provide a measure of Value Added (or GDP) on a district council basis across New Zealand.

These databases organise the statistics according to the Australian and New Zealand Standard Industrial Classification (ANZSIC). However, data relating to agriculture is not released in the BDS publication and therefore, BERL provides estimates of employment and activity units in this industry. These estimates are based on the 1996, 2001, and 2006 censuses as well as additional information during the inter-Census periods.

Full-Time Equivalent (FTE) employment is a measure of the volume of labour used in production. FTE employment is calculated as the number of full-time jobs plus one third the numbers of part-time jobs. That is, in this calculation, three part-time jobs are assumed equivalent to one full-time employee. Note: the estimates of FTE employment in this report include the self-employed with no employees, self-employed employers and employees.

Value Added. This is a measure of the total value of output contributed by the activities of organisations in an industry (including profits and the wages or salaries of employees). It is measured by deducting the purchases of goods and services used in production from the industries' output.¹⁷

The sum of Value Added for all industries in a council area is the equivalent of the Region council's Gross Domestic Product (GDP), and is conceptually comparable to official figures for New Zealand's GDP.

The Value Added measure is drawn from BERL's proprietary Regional Database, which is based on the official GDP statistics, trends in labour productivity at the national level and changes in local FTE employment. Real Value Added is measured in constant 2013 price levels, which removes the effect of inflation and focuses on the change in the volume of (real) activity.

8.2 Methodological issues: revisions, method improvements and caveats

All figures in this year's report use a consistent time series and methodology: this means comparisons of one year's figures with another year's figures cited in this report are valid.

8.2.1 Statistics New Zealand classification changes

The international standards and classifications used to construct official statistics are changed in cycles, with major upgrades happening every 10 to 15 years. As of September 2011, Statistics NZ converted from the 1996 Australian and New Zealand Industry Classification (ANZSIC96) to using the latest industry classification standard, ANZSIC06.

The new standard, ANZSIC06:

- creates a new division (division J, information media and telecommunications)

¹⁷ This measure eliminates double counting of outputs of Business Units that are used as inputs by others. For example, the total Value Added incorporated in a loaf of bread is the sum of the sales of wheat farmers, millers, bakeries and supermarkets less their purchases from each other (and other Business Units). For this reason, Value Added is considered a more accurate measure of the economic impact of combined activities than, say, total sales.

- separates ANZSIC96 division L (property and business services) into three separate divisions (L, M, and N)
- alters the way government output is calculated.

For more detail, see Statistics New Zealand's Commentary for the December 2011 GDP release.

BERL started implementing ANZSIC06 in our regional database in 2011. BERL revised the data series in the BERL Regional Database to conform to the new industry classifications, and all data from previous years up to and including 2013 are consistently classified using this standard.

The 2011 Otago Region profile and the current Overview use the ANZSIC06 classification. The ANZSIC06 system assigns economic activity into 86-industries, which are grouped into eight sectors:

- Primary
- Manufacturing
- Construction
- Wholesale and Distribution
- Retail Trade and Services
- Business services
- Arts and Recreation Services
- Social Services.

This contrasts with regional and district profiles prepared before 2011, which focused on seven sectors classified based on ANZSIC96. Although these earlier profiles covered all sectors, Retail trade and services and arts and recreation services are now treated as separate sectors.

Key sectors (non-standard classifications)

This report also looks at key sectors¹⁸ in the Otago Region economy, which use information from the BERL Database but are sets, subsets or mixtures of ANZSIC06 industries. For example, the Tourism sector is not a distinct sector in its own right and is instead consists of a portion of most other industries. These are broken down into tourism characteristic industries, tourism related industries and non-tourism related industries. BERL calculates tourism's proportion of each of the other industries in the region using ratios identified by Statistics New Zealand in the Tourism Satellite Account and then modified based on several regional indicators of tourism intensity. As such, to avoid double counting, tourism activity cannot be directly added in the analysis.

¹⁸ As recognised in the Otago Forward 10 Year Development Strategy.

The analysis shows GDP, employment and business units for the Region as well as for each district, between 2003 and 2013. The key sectors analysed are:

- Tourism¹⁹
- Primary Production
- Primary Processing
- Creative
- Education & Research
- Engineering, Machinery & Equipment Manufacturing.

For some districts, we have also included additional sectors such as ICT for Dunedin City; Horticulture and Viticulture for Central Otago; and Dairy and Sheep for Waitaki.

8.2.2 Revisions to the official statistics and data series

This profile uses official statistics of employment, activity units and output (GDP) from Statistics New Zealand, and an associated database developed by BERL, the BERL Regional Database.

On occasion, Statistics New Zealand revises historic data. For example, Statistics New Zealand issued substantially revised GDP figures in December 2011, with changes to figures going back a number of years. We incorporate this new information in our latest report to reflect the most up-to-date and accurate official statistics. This means some figures for a particular area, industry and year will differ in this report compared to previous economic profiles for the Otago Region.

8.2.3 Revisions to the BERL Regional Database

In addition to the official statistic revisions, BERL cross checks its estimates of regional economic activity. Where significant, anomalous changes for a particular activity measure for an area/industry cannot be rationalised or verified, these changes may be adjusted to reflect a longer-term trend. For example, in the report, "Economic Profile and Performance 2011: Otago Region (Year Ended March 2011)", the Food Processing industry registered a reduction of 1,000 FTEs in three sub-industries, despite no (net) reduction in business units in this industry in the Region. After further investigation with Council staff, this change could not be explained, and therefore the suspect statistics for the three sub-industries were overwritten for 2011 to indicate no change from the previous year.

However, the latest statistics for the Food Processing industry indicate that employment in 2013 has remained at a similar level as the uncorrected 2011 figure. Based on this new information, we have revised the 2011 figure recorded in the BERL database. This revision means that employment for 2011 for the Region reported in here is around 1,000 FTEs lower than in our previous report.

8.2.4 Estimation of employment at a fine level by industry and area

As part of transitioning the BERL Regional Database to ANZSI06, the Database employs an improved methodology to estimate full time/part time/self-employment patterns at a fine industry and area level. However, this change to the estimation method means that the regional employment by industry figures for a given year reported here will not match the equivalent figure in previous reports

¹⁹ The Tourism sector is not a distinct sector in its own right and is instead consists of a portion of most other industries. These are broken down into tourism characteristic industries, tourism related industries and non-tourism related industries. BERL calculates tourism's proportion of each of the other industries in the region using ratios identified by Statistics New Zealand in the Tourism Satellite Account and then modified based on several regional indicators of tourism intensity.

(for example, 2011). Employment by area and industry for different years reported here can be compared to other figures in this report, but should not be directly compared with figures in previous reports.

The Household Labour Force Survey (HLFS) does not report employment by area and industry at a fine level. BERL combines HLFS data with detailed Business Demography data on employee count by industry to estimate FTE employment by industry and area at a fine level.

A complication is that the detailed Business Demography dataset is based on headcount rather than full time equivalent workers and does not include self-employed workers. We wish to allow for both of these factors in our economic activity indicators.

Detailed industry-level employment information is used to disaggregate the high-level HLFS data (by area and industry at a fine level). These initial estimates are adjusted to allow for full time, part time and self-employed workers. This adjustment ensures that the grand total for employment is consistent with the reported HLFS figure for full time equivalent employment.

For example, we ensure that the industry level estimates in a given sector that has significant levels of self-workers, such as Agriculture, Construction and Retail Trade, match the HLFS total for that sector. Without this adjustment, employment in areas with a high proportion of employment in these industries may be underestimated, while it would be overestimated in areas with a low proportion in such industries.

8.2.5 Treatment of owner-occupied dwellings

The Business Services industry group includes the Property Services industry, which in turn includes the sub-industry Ownership of Owner-Occupied Dwellings. By definition, this sub-industry is included in the GDP figures to reflect the rental value of owner-occupied property, which is an imputed value.

However, this industry does not employ people. This process would bias labour productivity, especially in the property services industry and business services industry group. To avoid such bias, ownership of owner-occupied dwellings is excluded from all calculations of labour productivity.

For overall consistency purposes with official national GDP statistics, we include the imputed value of output for the ownership of owner-occupied dwellings industry in the total GDP figures (and associated statistics such as GDP per capita).

8.2.6 Caveats related to the estimation of regional GDP for the agriculture industry group

BERL estimates regional GDP by industry using employment data at the detailed industry level to split up the reported GDP for the broader industry group to which the detailed industries belong. For example, Statistics New Zealand reports GDP for the agriculture industry group rather than separate figures for the Horticulture and Fruit, Sheep and Beef, Dairy, and Other Livestock Farming industries. This process may overestimate GDP for some detailed industries in a group, and underestimate it for others, when there is rapid GDP growth due to rising productivity in one or a few particular industries in the group.

Statistics New Zealand reports GDP for the agriculture industry group rather than separate figures for the Horticulture and Fruit, Sheep and Beef, Dairy, and Other Livestock Farming industries. An issue for the 2013 regional GDP estimates is that GDP in the agricultural industry group grew by 30.8 percent while employment contracted by 0.6 percent. The growth in GDP is unlikely to be spread across each of the detailed industries in proportion to the change in an industry's employment.

Rather, it is likely that much of the group-level increase will be driven by the dairy industry, as a result of the global recovery and rising productivity in that industry due to rising global milk solid prices during 2011/12. This implies that the estimated GDP for the non-dairy industries will be overstated while the estimate for the dairy industry would be understated.

Areas that have disproportionately more activity in the non-dairy agriculture industries and less in the dairy industry will be affected by this estimation issue for the agriculture industry group GDP. The associated employment figures are reported at a finer level, and will therefore provide a more accurate picture of the change in activity at the detailed industry and industry group level in a particular area. The employment figures will not, however, reflect changes in productivity.

8.3 Sector composition

Table 8.1 The six key sectors of the Otago Region economy

Primary production	Primary processing	Creative sector	Education & Research	Engineering, Machinery & Equipment manufacturing	Tourism
Agriculture	Food Product Manufacturing	Printing	Preschool Education	Other Transport Equipment Manufacturing n.e.c.	Tourism-characteristic industries
Aquaculture	Beverage and Tobacco Product Manufacturing	Printing Support Services	Primary Education	Agricultural Machinery and Equipment Manufacturing	Tourism-related industries
Fishing Hunting and Trapping	Wood Product Manufacturing	Newspaper Publishing	Secondary Education	Mining and Construction Machinery Manufacturing	All non-tourism-related industries
Agriculture Forestry and Fishing Support Services	Pulp Paper and Converted Paper Product Manufacturing	Magazine and Other Periodical Publishing	Combined Primary and Secondary Education	Machine Tools and Parts Manufacturing	
Forestry and Logging		Book Publishing	Special School Education	Other Specialised Machinery and Equipment Manufacturing	
Coal Mining		Directory and Mailing List Publishing	Higher Education	Lifting and Material Handling Equipment Manufacturing	
Oil and Gas Extraction		Reproduction of Recorded Media	Technical and Vocational Education and Training	Other Machinery and Equipment Manufacturing n.e.c.	
Metal Ore Mining		Other Publishing (except Software, Music and Internet)	Arts Education	Photographic, Optical and Ophthalmic Equipment Manufacturing	
Non-Metallic Mineral Mining and Quarrying		Software Publishing	Adult, Community and Other Education n.e.c.	Electrical Lighting Equipment Manufacturing	
Exploration and Other Mining Support Services		Architectural Services	Educational Support Services	Fixed Space Heating, Cooling and Ventilation Equipment Manufacturing	
		Advertising Services	Scientific Research Services	Medical and Surgical Equipment Manufacturing	
		Other Specialised Design Services	Scientific Testing and Analysis Services	Other Professional and Scientific Equipment Manufacturing	
		Radio Broadcasting	Other Professional, Scientific and Technical Services n.e.c.	Engineering Design and Engineering Consulting Services	
		Cable and Other Subscription Broadcasting			
		Free-to-Air Television Broadcasting			
		Motion Picture and Video Production			
		Motion Picture and Video Distribution			
		Motion Picture Exhibition			
		Post-production Services and Other Motion Picture and Video Activities			
		Music Publishing			
		Music and Other Sound Recording Activities			
		Performing Arts Operation			
		Performing Arts Venue Operation			
		Creative Artists, Musicians, Writers and Performers			
		Professional Photographic Services			
		Photographic Film Processing			

8.4 Key indicators: sector share by territorial authority, 2013

Table 8.2 FTEs by sector and TA, 2013

FTEs by Sector and TA (2013)	Central Otago	Clutha	Dunedin City	Queenstown-Lakes	Waitaki	Otago Region
Primary	32%	42%	2%	3%	25%	12%
Manufacturing	6%	18%	8%	4%	20%	9%
Construction	13%	6%	8%	12%	8%	9%
Wholesale and Distribution	7%	4%	9%	6%	6%	7%
Retail Trade and Services	15%	11%	21%	41%	17%	22%
Business Services	13%	4%	15%	19%	8%	14%
Arts and Recreation Services	1%	0%	2%	6%	1%	2%
Social Services	13%	15%	34%	10%	16%	24%
Total	100%	100%	100%	100%	100%	100%

Source: BERL Regional Database, 2013

Table 8.3 GDP by sector and TA, 2013

GDP by Sector and TA (2013)	Central Otago	Clutha	Dunedin City	Queenstown-Lakes	Waitaki	Otago Region
Primary	30%	40%	3%	3%	21%	12%
Manufacturing	9%	22%	11%	5%	25%	13%
Construction	9%	4%	6%	9%	5%	6%
Wholesale and Distribution	9%	5%	12%	10%	7%	10%
Retail Trade and Services	9%	6%	12%	22%	9%	12%
Business Services	13%	5%	18%	24%	9%	16%
Arts and Recreation Services	1%	0%	2%	5%	1%	2%
Social Services	9%	9%	22%	8%	10%	16%
Sub-total (excluding O.O.D.)	89%	89%	84%	86%	87%	86%
Owner-Occupied Dwellings (O.O.D)*	11%	11%	16%	14%	13%	14%
Total	100%	100%	100%	100%	100%	100%

Source: BERL Regional Database, 2013

Table 8.4 Business units by sector and TA, 2013

BU by Sector and TA (2013)	Central Otago	Clutha	Dunedin City	Queenstown-Lakes	Waitaki	Otago Region
Primary	29%	49%	9%	5%	36%	18%
Manufacturing	4%	2%	4%	3%	3%	4%
Construction	11%	5%	9%	16%	8%	11%
Wholesale and Distribution	6%	3%	7%	5%	5%	6%
Retail Trade and Services	13%	10%	18%	17%	14%	16%
Business Services	31%	25%	40%	47%	27%	37%
Arts and Recreation Services	2%	1%	2%	4%	2%	3%
Social Services	5%	4%	10%	4%	5%	7%
Total	100%	100%	100%	100%	100%	100%

Source: BERL Regional Database, 2013

8.5 Detailed tables - Otago Region

Employment (FTEs) for	2003	2011	2012	2013	change 2012-2013		Change 2003 to 2013 %pa
					Number	%	
Agriculture	7,578	7,982	8,177	8,091	-86	-1.1	0.7
Aquaculture	6	10	10	10	0	-0.4	5.0
Forestry and Logging	264	258	245	213	-32	-13.2	-2.1
Fishing Hunting and Trapping	48	35	38	48	10	26.2	-0.1
Agriculture Forestry and Fishing Support Services	1,514	1,731	1,766	1,938	173	9.8	2.5
Coal Mining	15	13	17	13	-3	-20.3	-1.4
Oil and Gas Extraction	0	0	0	0	0	na	na
Metal Ore Mining	260	537	533	546	13	2.5	7.7
Non-Metallic Mineral Mining and Quarrying	153	147	141	150	8	5.9	-0.2
Exploration and Other Mining Support Services	0	13	10	47	37	364.7	na
Primary	9,838	10,727	10,937	11,056	119	1.1	1.2
Food Product Manufacturing	5,892	3,933	4,116	4,140	24	0.6	-3.5
Beverage and Tobacco Product Manufacturing	240	367	401	412	11	2.7	5.5
Textile Leather Clothing and Footwear Manufacturing	1,096	581	529	429	-100	-18.9	-8.9
Wood Product Manufacturing	941	717	742	704	-38	-5.1	-2.9
Pulp Paper and Converted Paper Product Manufacturing	80	49	30	27	-3	-10.2	-10.4
Printing	509	372	350	310	-40	-11.3	-4.8
Petroleum and Coal Product Manufacturing	3	61	65	65	0	-0.4	35.5
Basic Chemical and Chemical Product Manufacturing	160	113	119	153	34	28.5	-0.4
Polymer Product and Rubber Product Manufacturing	173	120	102	119	17	16.6	-3.7
Non-Metallic Mineral Product Manufacturing	192	220	218	226	8	3.5	1.6
Primary Metal and Metal Product Manufacturing	199	110	150	164	14	9.2	-1.9
Fabricated Metal Product Manufacturing	589	835	837	867	29	3.5	3.9
Transport Equipment Manufacturing	337	404	292	338	46	15.7	0.0
Machinery and Equipment Manufacturing	1,180	670	692	651	-42	-6.0	-5.8
Furniture and Other Manufacturing	193	258	236	216	-20	-8.4	1.1
Manufacturing	11,783	8,810	8,880	8,820	-60	-0.7	-2.9
Building Construction	1,751	2,264	2,163	2,240	77	3.5	2.5
Heavy and Civil Engineering Construction	1,888	2,396	2,390	2,146	-245	-10.2	1.3
Construction Services	3,185	4,749	4,586	4,271	-315	-6.9	3.0
Construction	6,825	9,408	9,140	8,656	-483	-5.3	2.4
Basic Material Wholesaling	717	752	748	697	-51	-6.8	-0.3
Machinery and Equipment Wholesaling	581	745	869	993	124	14.3	5.5
Motor Vehicle and Motor Vehicle Parts Wholesaling	140	168	173	189	15	8.9	3.0
Grocery Liquor and Tobacco Product Wholesaling	775	935	978	1,004	26	2.6	2.6
Other Goods Wholesaling	294	367	343	416	73	21.3	3.5
Commission-Based Wholesaling	85	43	50	48	-2	-4.8	-5.5
Road Transport	1,538	1,689	1,715	1,786	71	4.1	1.5
Rail Transport	65	53	63	54	-9	-14.6	-1.9
Water Transport	21	10	21	12	-9	-41.8	-5.2
Air and Space Transport	159	160	175	170	-4	-2.5	0.7
Other Transport	290	236	257	278	21	8.4	-0.4
Postal and Courier Pick-up and Delivery Services	625	480	479	477	-2	-0.5	-2.7
Transport Support Services	407	629	640	624	-15	-2.4	4.4
Warehousing and Storage Services	246	86	76	76	0	-0.4	-11.1
Wholesale and Distribution	5,942	6,354	6,586	6,823	237	3.6	1.4
Motor Vehicle and Motor Vehicle Parts Retailing	880	742	748	769	21	2.8	-1.3
Fuel Retailing	623	477	438	426	-12	-2.7	-3.7
Food Retailing	3,295	3,176	3,014	3,260	246	8.2	-0.1
Other Store-Based Retailing	5,413	4,787	4,838	4,798	-40	-0.8	-1.2
Non-Store Retailing and Retail Commission Based Buying and/or Selling	75	33	45	53	8	17.6	-3.5
Accommodation	3,109	3,682	4,136	3,736	-399	-9.7	1.9
Food and Beverage Services	3,760	4,781	4,963	5,295	332	6.7	3.5
Repair and Maintenance	1,082	1,218	1,246	1,221	-25	-2.0	1.2
Personal and Other Services	1,247	1,381	1,424	1,475	51	3.6	1.7
Private Households Employing Staff	0	0	0	0	0	na	na
Retail Trade and Services	19,484	20,277	20,851	21,033	182	0.9	0.8
Electricity Supply	180	282	314	325	11	3.6	6.1
Gas Supply	3	22	31	23	-8	-25.3	22.4
Water Supply Sewerage and Drainage Services	107	114	110	107	-3	-2.4	0.0
Waste Collection Treatment and Disposal Services	118	157	195	219	24	12.4	6.3
Publishing (except Internet and Music Publishing)	758	821	721	718	-3	-0.4	-0.5
Motion Picture and Sound Recording Activities	196	182	197	184	-12	-6.3	-0.6
Broadcasting (except Internet)	152	143	144	131	-13	-9.0	-1.5
Internet Publishing and Broadcasting	0	3	0	0	0	na	na
Telecommunications Services	59	83	74	53	-21	-28.9	-1.1
Internet Service Providers Web Search Portals and Data Processing Services	58	30	18	16	-2	-11.4	-12.0
Library and Other Information Services	177	195	177	173	-5	-2.6	-0.3
Finance	1,096	911	932	858	-73	-7.9	-2.4
Insurance and Superannuation Funds	99	107	121	71	-50	-41.3	-3.3
Auxiliary Finance and Insurance Services	344	490	495	519	23	4.7	4.2
Rental and Hiring Services (except Real Estate)	304	529	628	606	-22	-3.5	7.1
Property Operators and Real Estate Services	631	770	767	953	185	24.1	4.2
Professional Scientific and Technical Services (exc Comp Sys Dsn & related)	2,685	4,185	4,232	4,243	11	0.2	4.7
Computer System Design and Related Services	135	266	251	311	60	23.8	8.7
Administrative Services	1,637	2,871	2,867	2,891	24	0.8	5.9
Building Cleaning Pest Control and Other Support Services	1,235	1,224	1,164	883	-281	-24.2	-3.3
Business Services	9,975	13,386	13,438	13,282	-156	-1.2	2.9
Heritage Activities	332	585	562	471	-91	-16.1	3.6
Artistic Activities	81	87	91	77	-14	-15.4	-0.5
Sport and Recreation Activities	1,078	1,542	1,608	1,358	-250	-15.5	2.3
Gambling Activities	276	214	290	288	-2	-0.6	0.4
Arts and Recreation Services	1,767	2,429	2,551	2,194	-356	-14.0	2.2
Public Administration	1,575	2,044	2,026	2,024	-2	-0.1	2.5
Defence	227	29	22	22	0	-0.4	-20.7
Public Order Safety and Regulatory Services	1,183	2,037	1,987	1,923	-64	-3.2	5.0
Preschool and School Education	3,420	4,005	3,849	4,203	354	9.2	2.1
Tertiary Education	3,666	4,517	4,336	4,460	124	2.9	2.0
Adult Community and Other Education	315	377	337	328	-9	-2.6	0.4
Hospitals	2,854	3,418	3,558	3,711	153	4.3	2.7
Medical and Other Health Care Services	1,594	2,235	2,169	2,162	-8	-0.3	3.1
Residential Care Services	1,594	1,920	2,144	2,167	23	1.1	3.1
Social Assistance Services	1,445	1,970	1,815	1,635	-179	-9.9	1.2
Social Services	17,873	22,552	22,244	22,636	393	1.8	2.4
TOTAL ALL INDUSTRIES	83,487	93,942	94,626	94,501	-125	-0.1	1.2
Tourism sector	5284	9,014	9,715	9,572	-143	-1.5	6.1

Real value added (GDP 2013\$m) for	2003	2011	2012	2013	change 2012-2013		Change 2003 to 2013 %
					Number	%	
Agriculture	528	557	750	807	57	7.5	4.3
Aquaculture	0	1	1	1	0	-11.3	2.0
Forestry and Logging	90	126	120	111	-8	-7.0	2.1
Fishing Hunting and Trapping	3	2	2	3	0	12.5	-2.9
Agriculture Forestry and Fishing Support Services	109	94	107	105	-2	-2.2	-0.3
Coal Mining	3	1	1	1	0	-15.2	-11.7
Oil and Gas Extraction	0	0	0	0	0	na	na
Metal Ore Mining	56	46	36	39	3	9.2	-3.6
Non-Metallic Mineral Mining and Quarrying	33	13	10	11	1	12.8	-10.6
Exploration and Other Mining Support Services	0	1	1	3	3	394.8	na
<i>Primary</i>	<i>824</i>	<i>841</i>	<i>1,027</i>	<i>1,081</i>	<i>53</i>	<i>5.2</i>	<i>2.7</i>
Food Product Manufacturing	766	517	545	565	20	3.6	-3.0
Beverage and Tobacco Product Manufacturing	31	48	53	56	3	5.7	6.1
Textile Leather Clothing and Footwear Manufacturing	72	52	46	44	-2	-5.1	-4.9
Wood Product Manufacturing	129	121	129	119	-10	-7.4	-0.8
Pulp Paper and Converted Paper Product Manufacturing	11	8	5	5	-1	-12.4	-8.5
Printing	19	15	17	14	-3	-16.2	-2.8
Petroleum and Coal Product Manufacturing	1	16	16	21	4	25.9	39.0
Basic Chemical and Chemical Product Manufacturing	40	30	30	49	19	62.4	2.1
Polymer Product and Rubber Product Manufacturing	43	32	26	38	12	47.4	-1.2
Non-Metallic Mineral Product Manufacturing	33	36	35	39	4	11.6	1.5
Primary Metal and Metal Product Manufacturing	27	12	16	18	2	9.8	-4.0
Fabricated Metal Product Manufacturing	80	89	91	94	4	4.1	1.7
Transport Equipment Manufacturing	29	40	29	35	5	18.2	1.6
Machinery and Equipment Manufacturing	103	66	69	67	-3	-4.0	-4.3
Furniture and Other Manufacturing	13	17	16	15	-1	-7.9	1.2
<i>Manufacturing</i>	<i>1,397</i>	<i>1,099</i>	<i>1,124</i>	<i>1,177</i>	<i>53</i>	<i>4.7</i>	<i>-1.7</i>
Building Construction	120	146	128	150	22	16.8	2.2
Heavy and Civil Engineering Construction	130	154	142	144	2	1.2	1.0
Construction Services	219	305	272	286	14	5.0	2.7
<i>Construction</i>	<i>469</i>	<i>605</i>	<i>543</i>	<i>580</i>	<i>37</i>	<i>6.8</i>	<i>2.1</i>
Basic Material Wholesaling	80	88	88	83	-5	-5.6	0.3
Machinery and Equipment Wholesaling	65	87	102	118	16	15.7	6.1
Motor Vehicle and Motor Vehicle Parts Wholesaling	16	20	20	22	2	10.2	3.6
Grocery Liquor and Tobacco Product Wholesaling	87	109	115	120	4	3.9	3.2
Other Goods Wholesaling	33	43	40	49	9	22.8	4.2
Commission-Based Wholesaling	9	5	6	6	0	-3.7	-4.9
Road Transport	197	247	246	260	14	5.8	2.8
Rail Transport	8	8	9	8	-1	-13.3	-0.6
Water Transport	3	1	3	2	-1	-40.9	-4.0
Air and Space Transport	20	23	25	25	0	-0.9	2.0
Other Transport	37	34	37	41	4	10.1	0.9
Postal and Courier Pick-up and Delivery Services	80	70	69	70	1	1.1	-1.4
Transport Support Services	52	92	92	91	-1	-0.8	5.7
Warehousing and Storage Services	31	13	11	11	0	1.2	-9.9
<i>Wholesale and Distribution</i>	<i>720</i>	<i>840</i>	<i>864</i>	<i>906</i>	<i>42</i>	<i>4.9</i>	<i>2.3</i>
Motor Vehicle and Motor Vehicle Parts Retailing	40	50	53	56	3	5.6	3.5
Fuel Retailing	28	32	31	31	0	0.0	1.0
Food Retailing	150	212	215	239	24	11.2	4.8
Other Store-Based Retailing	247	320	345	352	7	1.9	3.6
Non-Store Retailing and Retail Commission Based Buying and/or Selling	3	2	3	4	1	20.9	1.2
Accommodation	103	120	134	119	-15	-10.9	1.4
Food and Beverage Services	125	156	161	169	8	5.2	3.1
Repair and Maintenance	55	59	60	59	-1	-1.8	0.7
Personal and Other Services	64	66	69	71	3	3.7	1.2
Private Households Employing Staff	0	0	0	0	0	na	na
<i>Retail Trade and Services</i>	<i>816</i>	<i>1,017</i>	<i>1,073</i>	<i>1,102</i>	<i>30</i>	<i>2.8</i>	<i>3.0</i>
Electricity Supply	81	105	111	104	-7	-6.6	2.6
Gas Supply	1	8	11	7	-4	-32.6	18.4
Water Supply Sewerage and Drainage Services	48	42	39	34	-5	-12.0	-3.4
Waste Collection Treatment and Disposal Services	53	58	69	70	1	1.4	2.8
Publishing (except Internet and Music Publishing)	28	34	35	33	-2	-5.9	1.6
Motion Picture and Sound Recording Activities	16	13	14	13	0	-2.3	-1.9
Broadcasting (except Internet)	13	10	10	9	0	-5.0	-2.8
Internet Publishing and Broadcasting	0	0	0	0	0	na	na
Telecommunications Services	59	90	74	57	-16	-22.0	-0.3
Internet Service Providers Web Search Portals and Data Processing Services	58	32	18	17	-1	-2.9	-11.3
Library and Other Information Services	9	9	9	8	0	-2.5	-0.8
Finance	148	148	151	141	-10	-6.4	-0.5
Insurance and Superannuation Funds	13	17	20	12	-8	-40.4	-1.3
Auxiliary Finance and Insurance Services	47	80	80	85	5	6.4	6.3
Rental and Hiring Services (except Real Estate)	74	134	161	156	-4	-2.6	7.8
Property Operators and Real Estate Services	67	84	85	106	21	25.1	4.7
Professional Scientific and Technical Services (exc Comp Sys Dsn & related)	291	382	398	397	0	-0.1	3.2
Computer System Design and Related Services	15	24	24	29	6	23.3	7.1
Administrative Services	88	130	129	133	5	3.6	4.2
Building Cleaning Pest Control and Other Support Services	66	55	52	41	-12	-22.1	-4.8
<i>Business Services</i>	<i>1,175</i>	<i>1,458</i>	<i>1,488</i>	<i>1,456</i>	<i>-32</i>	<i>-2.1</i>	<i>2.2</i>
Heritage Activities	27	42	39	34	-5	-12.5	2.2
Artistic Activities	7	6	6	6	-1	-11.8	-1.8
Sport and Recreation Activities	89	111	111	98	-13	-11.9	1.0
Gambling Activities	14	10	14	14	0	-0.5	-0.1
<i>Arts and Recreation Services</i>	<i>137</i>	<i>169</i>	<i>171</i>	<i>152</i>	<i>-19</i>	<i>-11.1</i>	<i>1.0</i>
Public Administration	129	194	187	186	-1	-0.4	3.8
Defence	15	2	2	2	0	-0.5	-19.8
Public Order Safety and Regulatory Services	76	150	144	139	-5	-3.2	6.2
Preschool and School Education	187	195	191	210	19	9.7	1.1
Tertiary Education	201	220	215	222	7	3.4	1.0
Adult Community and Other Education	17	18	17	16	0	-2.1	-0.5
Hospitals	222	272	273	291	18	6.5	2.7
Medical and Other Health Care Services	124	178	166	169	3	1.8	3.2
Residential Care Services	124	153	165	170	5	3.2	3.2
Social Assistance Services	74	95	88	79	-9	-9.7	0.7
<i>Social Services</i>	<i>1,170</i>	<i>1,477</i>	<i>1,447</i>	<i>1,485</i>	<i>38</i>	<i>2.6</i>	<i>2.4</i>
<i>Subtotal</i>	<i>6,708</i>	<i>7,507</i>	<i>7,736</i>	<i>7,937</i>	<i>202</i>	<i>2.6</i>	<i>1.7</i>
Owner-Occupied Dwellings and Property Operators	1,094	1,284	1,289	1,301	12	0.9	1.7
TOTAL ALL INDUSTRIES	7,802	8,791	9,025	9,239	214	2.4	1.7
<i>Tourism sector</i>	<i>376</i>	<i>540</i>	<i>574</i>	<i>568</i>	<i>-6</i>	<i>-1.0</i>	<i>4.2</i>

Activity units for	2003	2011	2012	2013	change 2012-2013		Change 2003 to 2013 %
					Number	%	
Agriculture	4,262	3,847	3,867	3,785	-82	-2.1	-1.2
Aquaculture	5	6	8	7	-1	-12.5	3.4
Forestry and Logging	388	372	361	348	-13	-3.6	-1.1
Fishing Hunting and Trapping	121	90	87	84	-3	-3.4	-3.6
Agriculture Forestry and Fishing Support Services	399	409	436	453	17	3.9	1.3
Coal Mining	1	1	1	1	0	0.0	0.0
Oil and Gas Extraction	0	0	1	0	-1	-100.0	na
Metal Ore Mining	12	8	8	12	4	50.0	0.0
Non-Metallic Mineral Mining and Quarrying	20	28	28	30	2	7.1	4.1
Exploration and Other Mining Support Services	4	8	11	14	3	27.3	13.3
<i>Primary</i>	<i>5,212</i>	<i>4,769</i>	<i>4,808</i>	<i>4,734</i>	<i>-74</i>	<i>-1.5</i>	<i>-1.0</i>
Food Product Manufacturing	126	119	125	130	5	4.0	0.3
Beverage and Tobacco Product Manufacturing	28	58	57	68	11	19.3	9.3
Textile Leather Clothing and Footwear Manufacturing	82	69	61	64	3	4.9	-2.4
Wood Product Manufacturing	108	109	107	110	3	2.8	0.2
Pulp Paper and Converted Paper Product Manufacturing	5	3	4	4	0	0.0	-2.2
Printing	41	44	43	47	4	9.3	1.4
Petroleum and Coal Product Manufacturing	3	3	3	3	0	0.0	0.0
Basic Chemical and Chemical Product Manufacturing	20	19	21	23	2	9.5	1.4
Polymer Product and Rubber Product Manufacturing	19	21	20	19	-1	-5.0	0.0
Non-Metallic Mineral Product Manufacturing	49	51	49	52	3	6.1	0.6
Primary Metal and Metal Product Manufacturing	9	13	12	12	0	0.0	2.9
Fabricated Metal Product Manufacturing	114	128	130	130	0	0.0	1.3
Transport Equipment Manufacturing	58	72	69	61	-8	-11.6	0.5
Machinery and Equipment Manufacturing	135	132	135	134	-1	-0.7	-0.1
Furniture and Other Manufacturing	78	80	72	74	2	2.8	-0.5
<i>Manufacturing</i>	<i>875</i>	<i>921</i>	<i>908</i>	<i>931</i>	<i>23</i>	<i>2.5</i>	<i>0.6</i>
Building Construction	617	1,050	1,025	1,025	0	0.0	5.2
Heavy and Civil Engineering Construction	90	98	100	97	-3	-3.0	0.8
Construction Services	1,216	1,695	1,647	1,660	13	0.8	3.2
<i>Construction</i>	<i>1,923</i>	<i>2,843</i>	<i>2,772</i>	<i>2,782</i>	<i>10</i>	<i>0.4</i>	<i>3.8</i>
Basic Material Wholesaling	166	197	193	194	1	0.5	1.6
Machinery and Equipment Wholesaling	157	168	170	182	12	7.1	1.5
Motor Vehicle and Motor Vehicle Parts Wholesaling	62	63	65	60	-5	-7.7	-0.3
Grocery Liquor and Tobacco Product Wholesaling	114	99	107	107	0	0.0	-0.6
Other Goods Wholesaling	150	138	142	143	1	0.7	-0.5
Commission-Based Wholesaling	50	27	28	27	-1	-3.6	-6.0
Road Transport	429	434	418	437	19	4.5	0.2
Rail Transport	6	3	3	3	0	0.0	-6.7
Water Transport	5	8	7	7	0	0.0	3.4
Air and Space Transport	41	35	36	34	-2	-5.6	-1.9
Other Transport	54	64	70	69	-1	-1.4	2.5
Postal and Courier Pick-up and Delivery Services	165	187	183	183	0	0.0	1.0
Transport Support Services	42	53	52	58	6	11.5	3.3
Warehousing and Storage Services	23	21	18	20	2	11.1	-1.4
<i>Wholesale and Distribution</i>	<i>1,464</i>	<i>1,497</i>	<i>1,492</i>	<i>1,524</i>	<i>32</i>	<i>2.1</i>	<i>0.4</i>
Motor Vehicle and Motor Vehicle Parts Retailing	128	143	147	149	2	1.4	1.5
Fuel Retailing	85	67	64	63	-1	-1.6	-3.0
Food Retailing	266	275	281	286	5	1.8	0.7
Other Store-Based Retailing	980	1,124	1,133	1,118	-15	-1.3	1.3
Non-Store Retailing and Retail Commission Based Buying and/or Selling	55	65	65	75	10	15.4	3.2
Accommodation	495	574	575	589	14	2.4	1.8
Food and Beverage Services	694	850	859	872	13	1.5	2.3
Repair and Maintenance	423	440	438	439	1	0.2	0.4
Personal and Other Services	513	602	603	614	11	1.8	1.8
Private Households Employing Staff	0	0	0	0	0	na	na
<i>Retail Trade and Services</i>	<i>3,639</i>	<i>4,140</i>	<i>4,165</i>	<i>4,205</i>	<i>40</i>	<i>1.0</i>	<i>1.5</i>
Electricity Supply	13	17	20	20	0	0.0	4.4
Gas Supply	1	2	3	4	1	33.3	14.9
Water Supply Sewerage and Drainage Services	11	20	19	17	-2	-10.5	4.4
Waste Collection Treatment and Disposal Services	37	39	41	43	2	4.9	1.5
Publishing (except Internet and Music Publishing)	26	45	48	47	-1	-2.1	6.1
Motion Picture and Sound Recording Activities	83	121	113	112	-1	-0.9	3.0
Broadcasting (except Internet)	24	18	19	19	0	0.0	-2.3
Internet Publishing and Broadcasting	0	3	2	2	0	0.0	na
Telecommunications Services	13	12	11	11	0	0.0	-1.7
Internet Service Providers Web Search Portals and Data Processing Services	13	20	19	22	3	15.8	5.4
Library and Other Information Services	22	21	23	22	-1	-4.3	0.0
Finance	315	1,188	1,250	1,319	69	5.5	15.4
Insurance and Superannuation Funds	60	40	42	42	0	0.0	-3.5
Auxiliary Finance and Insurance Services	161	221	226	202	-24	-10.6	2.3
Rental and Hiring Services (except Real Estate)	271	301	308	318	10	3.2	1.6
Property Operators and Real Estate Services	3,045	4,858	4,888	5,096	208	4.3	5.3
Professional Scientific and Technical Services (exc Comp Sys Dsn & related)	1,095	1,533	1,579	1,615	36	2.3	4.0
Computer System Design and Related Services	100	181	194	202	8	4.1	7.3
Administrative Services	286	410	408	440	32	7.8	4.4
Building Cleaning Pest Control and Other Support Services	203	292	292	297	5	1.7	3.9
<i>Business Services</i>	<i>5,779</i>	<i>9,342</i>	<i>9,505</i>	<i>9,850</i>	<i>345</i>	<i>3.6</i>	<i>5.5</i>
Heritage Activities	41	53	53	51	-2	-3.8	2.2
Artistic Activities	98	126	120	126	6	5.0	2.5
Sport and Recreation Activities	410	474	480	487	7	1.5	1.7
Gambling Activities	14	10	12	11	-1	-8.3	-2.4
<i>Arts and Recreation Services</i>	<i>563</i>	<i>663</i>	<i>665</i>	<i>675</i>	<i>10</i>	<i>1.5</i>	<i>1.8</i>
Public Administration	106	81	82	80	-2	-2.4	-2.8
Defence	4	3	2	2	0	0.0	-6.7
Public Order Safety and Regulatory Services	149	163	158	157	-1	-0.6	0.5
Preschool and School Education	291	295	296	293	-3	-1.0	0.1
Tertiary Education	25	38	47	40	-7	-14.9	4.8
Adult Community and Other Education	114	159	157	155	-2	-1.3	3.1
Hospitals	15	14	14	14	0	0.0	-0.7
Medical and Other Health Care Services	612	802	820	805	-15	-1.8	2.8
Residential Care Services	87	84	84	81	-3	-3.6	-0.7
Social Assistance Services	105	138	139	145	6	4.3	3.3
<i>Social Services</i>	<i>1,508</i>	<i>1,777</i>	<i>1,799</i>	<i>1,772</i>	<i>-27</i>	<i>-1.5</i>	<i>1.6</i>
TOTAL ALL INDUSTRIES	20,963	25,952	26,114	26,473	359	1.4	2.4
<i>Tourism sector</i>	<i>1,022</i>	<i>1,758</i>	<i>1,834</i>	<i>1,827</i>	<i>-7</i>	<i>-0.4</i>	<i>6.0</i>

8.6 Detailed tables - Central Otago District

Employment (FTEs) for	2003	2011	2012	2013	change 2012-2013		Change 2003 to 2013 %pa
					Number	%	
Agriculture	1,815	2,152	2,320	2,467	148	6.4	3.1
Aquaculture	0	0	0	0	0	na	na
Forestry and Logging	14	15	18	15	-3	-17.4	0.4
Fishing Hunting and Trapping	2	2	9	15	6	59.5	20.1
Agriculture Forestry and Fishing Support Services	437	773	726	774	48	6.6	5.9
Coal Mining	0	0	0	0	0	na	na
Oil and Gas Extraction	0	0	0	0	0	na	na
Metal Ore Mining	0	17	17	10	-7	-40.2	na
Non-Metallic Mineral Mining and Quarrying	0	13	7	32	26	381.3	na
Exploration and Other Mining Support Services	0	7	10	47	37	364.7	na
Primary	2,268	2,978	3,107	3,361	254	8.2	4.0
Food Product Manufacturing	206	73	71	87	17	23.5	-8.2
Beverage and Tobacco Product Manufacturing	82	211	220	239	19	8.7	11.3
Textile Leather Clothing and Footwear Manufacturing	8	6	6	6	0	-0.5	-3.3
Wood Product Manufacturing	81	82	92	93	1	0.7	1.4
Pulp Paper and Converted Paper Product Manufacturing	3	0	0	0	0	na	-100.0
Printing	16	25	25	20	-5	-21.2	1.8
Petroleum and Coal Product Manufacturing	0	0	3	3	0	-0.4	na
Basic Chemical and Chemical Product Manufacturing	3	0	0	0	0	na	-100.0
Polymer Product and Rubber Product Manufacturing	0	3	0	6	6	na	na
Non-Metallic Mineral Product Manufacturing	36	47	45	49	3	7.2	2.9
Primary Metal and Metal Product Manufacturing	0	0	0	0	0	na	na
Fabricated Metal Product Manufacturing	32	79	83	95	12	14.1	11.7
Transport Equipment Manufacturing	6	3	6	3	-3	-50.6	-6.1
Machinery and Equipment Manufacturing	39	30	26	32	6	23.7	-2.0
Furniture and Other Manufacturing	0	3	3	6	3	97.4	na
Manufacturing	512	561	581	638	58	9.9	2.2
Building Construction	231	285	262	243	-19	-7.1	0.5
Heavy and Civil Engineering Construction	527	710	726	691	-34	-4.7	2.7
Construction Services	299	460	454	416	-38	-8.3	3.4
Construction	1,057	1,454	1,441	1,350	-91	-6.3	2.5
Basic Material Wholesaling	51	94	100	81	-19	-18.9	4.8
Machinery and Equipment Wholesaling	23	76	82	94	11	13.9	14.9
Motor Vehicle and Motor Vehicle Parts Wholesaling	9	12	12	13	1	12.1	3.7
Grocery Liquor and Tobacco Product Wholesaling	98	128	98	114	16	16.2	1.5
Other Goods Wholesaling	3	6	6	6	0	-1.1	7.5
Commission-Based Wholesaling	19	7	10	7	-3	-33.6	-9.7
Road Transport	188	283	278	301	23	8.2	4.8
Rail Transport	0	0	0	0	0	na	na
Water Transport	0	0	0	0	0	na	na
Air and Space Transport	0	0	0	0	0	na	na
Other Transport	0	4	4	4	0	0.0	na
Postal and Courier Pick-up and Delivery Services	40	40	47	50	3	6.8	2.2
Transport Support Services	0	6	9	15	6	64.3	na
Warehousing and Storage Services	19	0	0	0	0	na	-100.0
Wholesale and Distribution	450	656	647	686	38	5.9	4.3
Motor Vehicle and Motor Vehicle Parts Retailing	104	77	67	73	6	8.4	-3.5
Fuel Retailing	70	69	71	68	-3	-4.9	-0.3
Food Retailing	311	331	312	340	27	8.7	0.9
Other Store-Based Retailing	320	320	316	311	-5	-1.6	-0.3
Non-Store Retailing and Retail Commission Based Buying and/or Selling	3	0	0	2	2	na	-1.7
Accommodation	147	152	177	187	10	5.6	2.4
Food and Beverage Services	196	358	366	347	-19	-5.1	5.9
Repair and Maintenance	89	119	121	135	13	11.1	4.3
Personal and Other Services	35	76	85	86	1	0.9	9.3
Private Households Employing Staff	0	0	0	0	0	na	na
Retail Trade and Services	1,275	1,503	1,517	1,549	32	2.1	2.0
Electricity Supply	43	76	72	72	0	0.3	5.3
Gas Supply	0	0	0	0	0	na	na
Water Supply Sewerage and Drainage Services	3	3	3	7	3	99.2	8.0
Waste Collection Treatment and Disposal Services	10	40	40	49	9	21.4	16.7
Publishing (except Internet and Music Publishing)	10	21	16	24	7	43.8	9.0
Motion Picture and Sound Recording Activities	0	0	0	0	0	na	na
Broadcasting (except Internet)	19	7	0	3	3	na	-15.7
Internet Publishing and Broadcasting	0	0	0	0	0	na	na
Telecommunications Services	3	0	3	0	-3	-100.0	-100.0
Internet Service Providers Web Search Portals and Data Processing Services	3	0	0	0	0	na	-100.0
Library and Other Information Services	14	15	18	17	0	-2.6	2.4
Finance	51	64	83	68	-15	-18.5	3.0
Insurance and Superannuation Funds	6	6	6	6	0	-0.5	1.1
Auxiliary Finance and Insurance Services	14	32	32	25	-8	-24.2	6.1
Rental and Hiring Services (except Real Estate)	5	22	14	14	0	2.2	10.3
Property Operators and Real Estate Services	70	58	70	60	-9	-13.3	-1.4
Professional Scientific and Technical Services (exc Comp Sys Dsn & related)	253	304	255	237	-18	-7.1	-0.6
Computer System Design and Related Services	9	6	6	13	6	100.9	3.1
Administrative Services	111	624	605	666	60	10.0	19.6
Building Cleaning Pest Control and Other Support Services	319	171	109	124	15	13.3	-9.0
Business Services	941	1,450	1,335	1,385	50	3.7	3.9
Heritage Activities	17	24	22	23	2	7.3	3.0
Artistic Activities	0	0	0	0	0	na	na
Sport and Recreation Activities	50	73	71	88	17	24.3	5.7
Gambling Activities	0	0	0	0	0	na	na
Arts and Recreation Services	68	97	92	111	19	20.3	5.1
Public Administration	106	137	155	141	-14	-8.9	2.9
Defence	0	0	0	0	0	na	na
Public Order Safety and Regulatory Services	44	50	54	47	-6	-11.9	0.7
Preschool and School Education	271	390	393	415	22	5.7	4.4
Tertiary Education	36	28	36	28	-8	-21.6	-2.4
Adult Community and Other Education	16	19	27	30	3	13.0	6.2
Hospitals	134	153	162	184	23	14.1	3.2
Medical and Other Health Care Services	193	264	255	248	-6	-2.5	2.5
Residential Care Services	73	135	134	133	-1	-0.5	6.2
Social Assistance Services	27	91	115	111	-4	-3.3	15.2
Social Services	901	1,267	1,329	1,338	10	0.7	4.0
TOTAL ALL INDUSTRIES	7,472	9,966	10,049	10,419	369	3.7	3.4
Tourism sector	301	621	506	497	-9	-1.9	5.1

Real value added (GDP 2013\$m) for	2003	2011	2012	2013	change 2012-2013		Change 2003 to 2013 %pa
					Number	%	
Agriculture	127	150	213	246	33	15.6	6.9
Aquaculture	0	0	0	0	0	na	na
Forestry and Logging	5	7	9	8	-1	-11.5	4.8
Fishing Hunting and Trapping	0	0	1	1	0	42.1	16.8
Agriculture Forestry and Fishing Support Services	31	42	44	42	-2	-5.0	2.9
Coal Mining	0	0	0	0	0	na	na
Oil and Gas Extraction	0	0	0	0	0	na	na
Metal Ore Mining	0	1	1	1	0	-36.4	na
Non-Metallic Mineral Mining and Quarrying	0	1	0	2	2	412.5	na
Exploration and Other Mining Support Services	0	1	1	3	3	394.8	na
<i>Primary</i>	<i>163</i>	<i>203</i>	<i>269</i>	<i>303</i>	<i>34</i>	<i>12.8</i>	<i>6.4</i>
Food Product Manufacturing	27	10	9	12	3	27.1	-7.8
Beverage and Tobacco Product Manufacturing	11	28	29	33	3	12.0	11.9
Textile Leather Clothing and Footwear Manufacturing	1	1	1	1	0	16.4	0.9
Wood Product Manufacturing	11	14	16	16	0	-1.7	3.6
Pulp Paper and Converted Paper Product Manufacturing	0	0	0	0	0	na	-100.0
Printing	1	1	1	1	0	-25.5	4.0
Petroleum and Coal Product Manufacturing	0	0	1	1	0	25.9	na
Basic Chemical and Chemical Product Manufacturing	1	0	0	0	0	na	-100.0
Polymer Product and Rubber Product Manufacturing	0	1	0	2	2	na	na
Non-Metallic Mineral Product Manufacturing	6	8	7	8	1	15.5	2.9
Primary Metal and Metal Product Manufacturing	0	0	0	0	0	na	na
Fabricated Metal Product Manufacturing	4	8	9	10	1	14.7	9.3
Transport Equipment Manufacturing	1	0	1	0	0	-49.6	-4.6
Machinery and Equipment Manufacturing	3	3	3	3	1	26.4	-0.4
Furniture and Other Manufacturing	0	0	0	0	0	98.4	na
<i>Manufacturing</i>	<i>65</i>	<i>73</i>	<i>77</i>	<i>87</i>	<i>11</i>	<i>13.8</i>	<i>3.0</i>
Building Construction	16	18	16	16	1	4.7	0.2
Heavy and Civil Engineering Construction	36	46	43	46	3	7.4	2.5
Construction Services	21	30	27	28	1	3.4	3.1
<i>Construction</i>	<i>73</i>	<i>94</i>	<i>86</i>	<i>90</i>	<i>5</i>	<i>5.7</i>	<i>2.2</i>
Basic Material Wholesaling	6	11	12	10	-2	-17.9	5.4
Machinery and Equipment Wholesaling	3	9	10	11	1	15.3	15.6
Motor Vehicle and Motor Vehicle Parts Wholesaling	1	1	1	2	0	13.5	4.3
Grocery Liquor and Tobacco Product Wholesaling	11	15	12	14	2	17.7	2.1
Other Goods Wholesaling	0	1	1	1	0	0.1	8.1
Commission-Based Wholesaling	2	1	1	1	0	-32.8	-9.2
Road Transport	24	41	40	44	4	10.0	6.2
Rail Transport	0	0	0	0	0	na	na
Water Transport	0	0	0	0	0	na	na
Air and Space Transport	0	0	0	0	0	na	na
Other Transport	0	1	1	1	0	1.6	na
Postal and Courier Pick-up and Delivery Services	5	6	7	7	1	8.5	3.5
Transport Support Services	0	1	0	2	1	66.9	na
Warehousing and Storage Services	2	0	0	0	0	na	-100.0
<i>Wholesale and Distribution</i>	<i>54</i>	<i>86</i>	<i>85</i>	<i>92</i>	<i>7</i>	<i>7.9</i>	<i>5.3</i>
Motor Vehicle and Motor Vehicle Parts Retailing	5	5	5	5	1	11.4	1.2
Fuel Retailing	3	5	5	5	0	-2.2	4.6
Food Retailing	14	22	22	25	3	11.7	5.8
Other Store-Based Retailing	15	21	23	23	0	1.1	4.6
Non-Store Retailing and Retail Commission Based Buying and/or Selling	0	0	0	0	0	na	3.1
Accommodation	5	5	6	6	0	4.1	2.0
Food and Beverage Services	7	12	12	11	-1	-6.4	5.5
Repair and Maintenance	5	6	6	7	1	11.3	3.7
Personal and Other Services	2	4	4	4	0	1.1	8.8
Private Households Employing Staff	0	0	0	0	0	na	na
<i>Retail Trade and Services</i>	<i>55</i>	<i>79</i>	<i>82</i>	<i>86</i>	<i>4</i>	<i>4.4</i>	<i>4.7</i>
Electricity Supply	19	28	25	23	-2	-9.5	1.8
Gas Supply	0	0	0	0	0	na	na
Water Supply Sewerage and Drainage Services	1	1	1	2	1	79.7	4.4
Waste Collection Treatment and Disposal Services	5	15	14	16	1	9.5	12.8
Publishing (except Internet and Music Publishing)	0	1	1	1	0	35.9	11.3
Motion Picture and Sound Recording Activities	0	0	0	0	0	na	na
Broadcasting (except Internet)	2	0	0	0	0	na	-16.8
Internet Publishing and Broadcasting	0	0	0	0	0	na	na
Telecommunications Services	3	0	3	0	-3	-100.0	-100.0
Internet Service Providers Web Search Portals and Data Processing Services	3	0	0	0	0	na	-100.0
Library and Other Information Services	1	1	1	1	0	-2.5	1.8
Finance	7	10	14	11	-2	-17.2	5.0
Insurance and Superannuation Funds	1	1	1	1	0	1.1	3.1
Auxiliary Finance and Insurance Services	2	5	5	4	-1	-23.0	8.2
Rental and Hiring Services (except Real Estate)	1	6	4	4	0	3.2	11.0
Property Operators and Real Estate Services	7	6	8	7	-1	-12.7	-0.9
Professional Scientific and Technical Services (exc Comp Sys Dsn & related)	27	28	24	22	-2	-7.4	-2.1
Computer System Design and Related Services	1	1	1	1	1	100.2	1.6
Administrative Services	6	28	27	31	4	13.0	17.8
Building Cleaning Pest Control and Other Support Services	17	8	5	6	1	16.4	-10.4
<i>Business Services</i>	<i>103</i>	<i>139</i>	<i>133</i>	<i>129</i>	<i>-4</i>	<i>-3.0</i>	<i>2.3</i>
Heritage Activities	1	2	2	2	0	12.0	1.6
Artistic Activities	0	0	0	0	0	na	na
Sport and Recreation Activities	4	5	5	6	1	29.7	4.3
Gambling Activities	0	0	0	0	0	na	na
<i>Arts and Recreation Services</i>	<i>6</i>	<i>7</i>	<i>6</i>	<i>8</i>	<i>2</i>	<i>25.5</i>	<i>3.7</i>
Public Administration	9	13	14	13	-1	-9.2	4.1
Defence	0	0	0	0	0	na	na
Public Order Safety and Regulatory Services	3	4	4	3	0	-11.9	1.8
Preschool and School Education	15	19	19	21	1	6.2	3.4
Tertiary Education	2	1	2	1	0	-21.2	-3.3
Adult Community and Other Education	1	1	1	2	0	13.5	5.2
Hospitals	10	12	12	14	2	16.6	3.3
Medical and Other Health Care Services	15	21	20	19	0	-0.5	2.6
Residential Care Services	6	11	10	10	0	1.6	6.3
Social Assistance Services	1	4	6	5	0	-3.1	14.6
<i>Social Services</i>	<i>62</i>	<i>86</i>	<i>89</i>	<i>90</i>	<i>1</i>	<i>1.3</i>	<i>3.8</i>
<i>Subtotal</i>	<i>580</i>	<i>767</i>	<i>827</i>	<i>886</i>	<i>59</i>	<i>7.1</i>	<i>4.3</i>
Owner-Occupied Dwellings and Property Operators	89	112	112	114	2	1.6	2.6
TOTAL ALL INDUSTRIES	669	879	939	1,000	61	6.5	4.1
<i>Tourism sector</i>	<i>23</i>	<i>36</i>	<i>30</i>	<i>31</i>	<i>1</i>	<i>1.7</i>	<i>3.2</i>

Activity units for	2003	2011	2012	2013	change 2012-2013		Change 2003 to 2013 %pp
					Number	%	
Agriculture	873	824	803	803	0	0.0	-0.8
Aquaculture	0	0	1	0	-1	-100.0	na
Forestry and Logging	30	22	22	24	2	9.1	-2.2
Fishing Hunting and Trapping	4	10	12	9	-3	-25.0	8.4
Agriculture Forestry and Fishing Support Services	76	92	96	106	10	10.4	3.4
Coal Mining	0	0	0	0	0	na	na
Oil and Gas Extraction	0	0	0	0	0	na	na
Metal Ore Mining	3	3	3	6	3	100.0	7.2
Non-Metallic Mineral Mining and Quarrying	4	5	4	5	1	25.0	2.3
Exploration and Other Mining Support Services	1	2	3	3	0	0.0	11.6
<i>Primary</i>	<i>991</i>	<i>958</i>	<i>944</i>	<i>956</i>	<i>12</i>	<i>1.3</i>	<i>-0.4</i>
Food Product Manufacturing	15	14	14	15	1	7.1	0.0
Beverage and Tobacco Product Manufacturing	11	30	30	33	3	10.0	11.6
Textile Leather Clothing and Footwear Manufacturing	2	8	5	6	1	20.0	11.6
Wood Product Manufacturing	12	16	15	16	1	6.7	2.9
Pulp Paper and Converted Paper Product Manufacturing	1	1	1	1	0	0.0	0.0
Printing	2	2	3	3	0	0.0	4.1
Petroleum and Coal Product Manufacturing	1	1	1	1	0	0.0	0.0
Basic Chemical and Chemical Product Manufacturing	3	1	2	2	0	0.0	-4.0
Polymer Product and Rubber Product Manufacturing	1	3	4	4	0	0.0	14.9
Non-Metallic Mineral Product Manufacturing	7	12	11	12	1	9.1	5.5
Primary Metal and Metal Product Manufacturing	1	1	0	0	0	na	-100.0
Fabricated Metal Product Manufacturing	9	14	16	17	1	6.3	6.6
Transport Equipment Manufacturing	6	7	6	4	-2	-33.3	-4.0
Machinery and Equipment Manufacturing	16	14	15	13	-2	-13.3	-2.1
Furniture and Other Manufacturing	5	8	9	8	-1	-11.1	4.8
<i>Manufacturing</i>	<i>92</i>	<i>132</i>	<i>132</i>	<i>135</i>	<i>3</i>	<i>2.3</i>	<i>3.9</i>
Building Construction	66	130	125	124	-1	-0.8	6.5
Heavy and Civil Engineering Construction	19	27	25	25	0	0.0	2.8
Construction Services	141	227	206	205	-1	-0.5	3.8
<i>Construction</i>	<i>226</i>	<i>384</i>	<i>356</i>	<i>354</i>	<i>-2</i>	<i>-0.6</i>	<i>4.6</i>
Basic Material Wholesaling	22	38	37	37	0	0.0	5.3
Machinery and Equipment Wholesaling	14	17	17	18	1	5.9	2.5
Motor Vehicle and Motor Vehicle Parts Wholesaling	5	7	7	5	-2	-28.6	0.0
Grocery Liquor and Tobacco Product Wholesaling	19	18	20	22	2	10.0	1.5
Other Goods Wholesaling	8	11	12	13	1	8.3	5.0
Commission-Based Wholesaling	8	7	6	7	1	16.7	-1.3
Road Transport	37	41	40	42	2	5.0	1.3
Rail Transport	0	0	0	0	0	na	na
Water Transport	1	0	0	0	0	na	-100.0
Air and Space Transport	1	1	3	2	-1	-33.3	7.2
Other Transport	0	6	8	6	-2	-25.0	na
Postal and Courier Pick-up and Delivery Services	24	31	33	32	-1	-3.0	2.9
Transport Support Services	0	4	5	4	-1	-20.0	na
Warehousing and Storage Services	2	4	3	4	1	33.3	7.2
<i>Wholesale and Distribution</i>	<i>141</i>	<i>185</i>	<i>191</i>	<i>192</i>	<i>1</i>	<i>0.5</i>	<i>3.1</i>
Motor Vehicle and Motor Vehicle Parts Retailing	14	18	19	17	-2	-10.5	2.0
Fuel Retailing	11	10	10	10	0	0.0	-0.9
Food Retailing	33	35	36	39	3	8.3	1.7
Other Store-Based Retailing	86	110	111	103	-8	-7.2	1.8
Non-Store Retailing and Retail Commission Based Buying and/or Selling	4	6	6	5	-1	-16.7	2.3
Accommodation	49	65	66	69	3	4.5	3.5
Food and Beverage Services	66	82	83	79	-4	-4.8	1.8
Repair and Maintenance	43	50	50	49	-1	-2.0	1.3
Personal and Other Services	39	57	58	60	2	3.4	4.4
Private Households Employing Staff	0	0	0	0	0	na	na
<i>Retail Trade and Services</i>	<i>345</i>	<i>433</i>	<i>439</i>	<i>431</i>	<i>-8</i>	<i>-1.8</i>	<i>2.3</i>
Electricity Supply	4	4	4	4	0	0.0	0.0
Gas Supply	0	0	0	0	0	na	na
Water Supply Sewerage and Drainage Services	2	8	7	7	0	0.0	13.3
Waste Collection Treatment and Disposal Services	3	5	6	5	-1	-16.7	5.2
Publishing (except Internet and Music Publishing)	2	5	5	7	2	40.0	13.3
Motion Picture and Sound Recording Activities	0	2	1	3	2	200.0	na
Broadcasting (except Internet)	4	2	3	1	-2	-66.7	-12.9
Internet Publishing and Broadcasting	0	0	0	0	0	na	na
Telecommunications Services	1	1	1	1	0	0.0	0.0
Internet Service Providers Web Search Portals and Data Processing Services	1	0	0	1	1	na	0.0
Library and Other Information Services	3	3	3	3	0	0.0	0.0
Finance	21	110	126	133	7	5.6	20.3
Insurance and Superannuation Funds	2	2	2	2	0	0.0	0.0
Auxiliary Finance and Insurance Services	14	22	25	22	-3	-12.0	4.6
Rental and Hiring Services (except Real Estate)	22	32	29	29	0	0.0	2.8
Property Operators and Real Estate Services	318	542	541	570	29	5.4	6.0
Professional Scientific and Technical Services (exc Comp Sys Dsn & related)	90	157	153	162	9	5.9	6.1
Computer System Design and Related Services	5	8	9	12	3	33.3	9.1
Administrative Services	28	47	39	45	6	15.4	4.9
Building Cleaning Pest Control and Other Support Services	26	29	28	26	-2	-7.1	0.0
<i>Business Services</i>	<i>546</i>	<i>979</i>	<i>982</i>	<i>1,033</i>	<i>51</i>	<i>5.2</i>	<i>6.6</i>
Heritage Activities	6	9	8	7	-1	-12.5	1.6
Artistic Activities	4	7	8	9	1	12.5	8.4
Sport and Recreation Activities	40	53	57	62	5	8.8	4.5
Gambling Activities	0	0	0	0	0	na	na
<i>Arts and Recreation Services</i>	<i>50</i>	<i>69</i>	<i>73</i>	<i>78</i>	<i>5</i>	<i>6.8</i>	<i>4.5</i>
Public Administration	13	10	10	10	0	0.0	-2.6
Defence	0	0	0	0	0	na	na
Public Order Safety and Regulatory Services	19	21	21	21	0	0.0	1.0
Preschool and School Education	28	32	33	33	0	0.0	1.7
Tertiary Education	2	3	5	5	0	0.0	9.6
Adult Community and Other Education	7	7	10	10	0	0.0	3.6
Hospitals	3	2	2	2	0	0.0	-4.0
Medical and Other Health Care Services	49	68	68	65	-3	-4.4	2.9
Residential Care Services	5	6	6	6	0	0.0	1.8
Social Assistance Services	6	8	8	9	1	12.5	4.1
<i>Social Services</i>	<i>132</i>	<i>157</i>	<i>163</i>	<i>161</i>	<i>-2</i>	<i>-1.2</i>	<i>2.0</i>
TOTAL ALL INDUSTRIES	2,523	3,297	3,280	3,340	60	1.8	2.8
<i>Tourism sector</i>	<i>103</i>	<i>199</i>	<i>173</i>	<i>162</i>	<i>-11</i>	<i>-6.5</i>	<i>4.6</i>

Table 8.5 Employment in Key Sectors, Central Otago District, 2003 to 2013

Key sectors employment (FTEs)					%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Primary production	2,268	2,978	3,107	3,361	8.2	4.0
Primary processing	369	365	383	419	9.5	1.3
Creative	61	78	67	66	-0.9	0.8
Education and research	363	501	505	515	2.0	3.5
Engineering, machinery and equipment manufacturing	61	59	54	60	11.0	-0.1
Key sectors (excluding Tourism)	3,122	3,982	4,116	4,421	7.4	3.5
Non-key sectors	4,350	5,984	5,933	5,997	1.1	3.3
Total employment: Central Otago	7,472	9,966	10,049	10,419	3.7	3.4
Tourism sector	301	621	506	497	-1.9	5.1

Source: BERL Regional Database 2013

Table 8.6 GDP in Key Sectors, Central Otago District, 2003 to 2013

Key sectors GDP (2013\$m)					%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Primary production	163	203	269	303	12.8	6.4
Primary processing	49	51	55	60	10.5	2.2
Creative	3	3	3	2	-20.7	-4.4
Education and research	22	27	27	27	0.9	2.2
Engineering, machinery and equipment manufacturing	6	6	5	6	12.5	0.3
Key sectors (excluding Tourism)	243	289	359	399	11.3	5.1
Non-key sectors	426	589	580	601	3.5	3.5
Total GDP: Central Otago	669	879	939	1,000	6.5	4.1
Tourism sector	23	36	30	31	1.7	3.2

Source: BERL Regional Database 2013

Table 8.7 Business Units in Key Sectors, Central Otago District, 2003 to 2013

Key sectors business units					%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Primary production	991	958	944	956	1.3	-0.4
Primary processing	38	60	59	64	8.5	5.4
Creative	27	57	58	62	6.9	8.7
Education and research	48	55	62	60	-3.2	2.3
Engineering, machinery and equipment manufacturing	33	45	44	44	0.0	2.9
Key sectors (excluding Tourism)	1,137	1,175	1,167	1,186	1.6	0.4
Non-key sectors	1,386	2,122	2,113	2,154	1.9	4.5
Total business units: Central Otago	2,523	3,297	3,280	3,340	1.8	2.8
Tourism sector	103	199	173	162	-6.5	4.6

Source: BERL Regional Database 2013

8.7 Detailed tables - Clutha District

Employment (FTEs) for	2003	2011	2012	2013	change 2012-2013		Change 2003 to 2013 %pa
					Number	%	
Agriculture	2,766	2,994	2,833	2,913	81	2.8	0.5
Aquaculture	0	0	0	0	0	na	na
Forestry and Logging	150	151	148	121	-27	-18.5	-2.1
Fishing Hunting and Trapping	2	2	0	0	0	na	-100.0
Agriculture Forestry and Fishing Support Services	665	515	588	659	72	12.2	-0.1
Coal Mining	15	13	17	13	-3	-20.3	-1.4
Oil and Gas Extraction	0	0	0	0	0	na	na
Metal Ore Mining	0	0	0	0	0	na	na
Non-Metallic Mineral Mining and Quarrying	62	22	34	20	-14	-40.2	-10.6
Exploration and Other Mining Support Services	0	0	0	0	0	na	na
<i>Primary</i>	<i>3,660</i>	<i>3,698</i>	<i>3,619</i>	<i>3,727</i>	<i>108</i>	<i>3.0</i>	<i>0.2</i>
Food Product Manufacturing	1,305	1,120	1,138	1,067	-71	-6.2	-2.0
Beverage and Tobacco Product Manufacturing	0	0	3	3	0	-0.3	na
Textile Leather Clothing and Footwear Manufacturing	80	39	9	39	30	331.3	-6.9
Wood Product Manufacturing	397	250	241	233	-7	-3.1	-5.2
Pulp Paper and Converted Paper Product Manufacturing	0	0	0	0	0	na	na
Printing	46	60	55	59	4	7.5	2.6
Petroleum and Coal Product Manufacturing	0	0	0	0	0	na	na
Basic Chemical and Chemical Product Manufacturing	0	3	3	3	0	-1.2	na
Polymer Product and Rubber Product Manufacturing	14	14	11	14	3	24.8	-0.1
Non-Metallic Mineral Product Manufacturing	28	30	39	38	-1	-3.8	3.0
Primary Metal and Metal Product Manufacturing	0	0	0	0	0	na	na
Fabricated Metal Product Manufacturing	49	61	55	51	-4	-7.7	0.3
Transport Equipment Manufacturing	50	32	24	29	5	20.2	-5.2
Machinery and Equipment Manufacturing	26	47	50	44	-6	-11.6	5.6
Furniture and Other Manufacturing	9	0	0	0	0	na	-100.0
<i>Manufacturing</i>	<i>2,003</i>	<i>1,657</i>	<i>1,628</i>	<i>1,580</i>	<i>-48</i>	<i>-2.9</i>	<i>-2.3</i>
Building Construction	233	206	202	184	-18	-8.9	-2.3
Heavy and Civil Engineering Construction	223	251	270	248	-23	-8.3	1.1
Construction Services	106	174	188	130	-58	-31.0	2.0
<i>Construction</i>	<i>562</i>	<i>631</i>	<i>660</i>	<i>562</i>	<i>-99</i>	<i>-15.0</i>	<i>0.0</i>
Basic Material Wholesaling	51	58	52	50	-3	-5.3	-0.3
Machinery and Equipment Wholesaling	19	16	22	33	12	54.3	5.6
Motor Vehicle and Motor Vehicle Parts Wholesaling	0	0	0	0	0	na	na
Grocery Liquor and Tobacco Product Wholesaling	5	0	0	6	6	na	1.2
Other Goods Wholesaling	0	9	12	11	0	-1.1	na
Commission-Based Wholesaling	3	10	7	3	-3	-50.2	0.8
Road Transport	273	197	204	200	-4	-1.9	-3.1
Rail Transport	3	0	3	3	0	-0.4	0.8
Water Transport	0	0	0	0	0	na	na
Air and Space Transport	0	0	0	0	0	na	na
Other Transport	0	0	0	2	2	na	na
Postal and Courier Pick-up and Delivery Services	13	16	19	16	-2	-12.7	2.2
Transport Support Services	0	6	9	3	-6	-67.1	na
Warehousing and Storage Services	0	0	0	0	0	na	na
<i>Wholesale and Distribution</i>	<i>369</i>	<i>312</i>	<i>327</i>	<i>329</i>	<i>1</i>	<i>0.4</i>	<i>-1.1</i>
Motor Vehicle and Motor Vehicle Parts Retailing	43	51	63	70	7	10.5	5.0
Fuel Retailing	81	74	49	59	10	19.9	-3.1
Food Retailing	213	207	216	238	22	10.4	1.1
Other Store-Based Retailing	193	161	174	146	-28	-15.9	-2.7
Non-Store Retailing and Retail Commission Based Buying and/or Selling	6	0	0	0	0	na	-100.0
Accommodation	78	96	110	98	-12	-11.0	2.3
Food and Beverage Services	162	169	148	158	10	6.5	-0.3
Repair and Maintenance	98	109	109	112	3	2.9	1.3
Personal and Other Services	34	59	63	69	6	9.7	7.5
Private Households Employing Staff	0	0	0	0	0	na	na
<i>Retail Trade and Services</i>	<i>907</i>	<i>925</i>	<i>932</i>	<i>950</i>	<i>18</i>	<i>1.9</i>	<i>0.5</i>
Electricity Supply	8	6	12	9	-3	-24.8	1.2
Gas Supply	0	0	0	0	0	na	na
Water Supply Sewerage and Drainage Services	0	0	0	0	0	na	na
Waste Collection Treatment and Disposal Services	5	14	12	20	9	73.8	14.4
Publishing (except Internet and Music Publishing)	12	21	16	17	0	2.7	3.0
Motion Picture and Sound Recording Activities	0	3	0	0	0	na	na
Broadcasting (except Internet)	0	0	0	0	0	na	na
Internet Publishing and Broadcasting	0	0	0	0	0	na	na
Telecommunications Services	3	0	0	0	0	na	-100.0
Internet Service Providers Web Search Portals and Data Processing Services	0	0	2	0	-2	-100.0	na
Library and Other Information Services	11	7	6	6	0	-2.6	-5.9
Finance	37	42	45	31	-13	-29.7	-1.6
Insurance and Superannuation Funds	0	6	6	6	0	-0.5	na
Auxiliary Finance and Insurance Services	3	3	3	3	0	1.0	1.2
Rental and Hiring Services (except Real Estate)	0	8	11	14	3	27.8	na
Property Operators and Real Estate Services	25	29	40	58	18	44.7	8.7
Professional Scientific and Technical Services (exc Comp Sys Dsn & related)	158	161	166	183	17	10.5	1.5
Computer System Design and Related Services	0	0	0	0	0	na	na
Administrative Services	5	19	23	17	-6	-24.4	13.6
Building Cleaning Pest Control and Other Support Services	32	28	35	28	-7	-19.1	-1.1
<i>Business Services</i>	<i>299</i>	<i>349</i>	<i>377</i>	<i>394</i>	<i>16</i>	<i>4.3</i>	<i>2.8</i>
Heritage Activities	2	6	3	3	0	-4.6	0.4
Artistic Activities	0	2	0	0	0	na	na
Sport and Recreation Activities	36	27	18	14	-4	-20.1	-8.8
Gambling Activities	0	0	0	0	0	na	na
<i>Arts and Recreation Services</i>	<i>36</i>	<i>35</i>	<i>20</i>	<i>17</i>	<i>-4</i>	<i>-18.0</i>	<i>-7.9</i>
Public Administration	73	77	72	87	15	20.1	1.8
Defence	0	0	0	0	0	na	na
Public Order Safety and Regulatory Services	99	379	372	355	-17	-4.7	13.6
Preschool and School Education	355	385	362	419	57	15.8	1.7
Tertiary Education	0	58	22	50	28	128.8	na
Adult Community and Other Education	44	11	11	9	-2	-16.6	-14.3
Hospitals	59	86	114	116	2	2.1	7.1
Medical and Other Health Care Services	124	89	82	78	-4	-4.9	-4.5
Residential Care Services	88	110	121	129	8	6.6	3.9
Social Assistance Services	46	87	119	103	-16	-13.2	8.4
<i>Social Services</i>	<i>888</i>	<i>1,284</i>	<i>1,276</i>	<i>1,347</i>	<i>71</i>	<i>5.6</i>	<i>4.3</i>
TOTAL ALL INDUSTRIES	8,726	8,891	8,839	8,904	64	0.7	0.2
<i>Tourism sector</i>	<i>142</i>	<i>295</i>	<i>213</i>	<i>219</i>	<i>6</i>	<i>2.9</i>	<i>4.4</i>

Real value added (GDP 2013\$m) for	2003	2011	2012	2013	change 2012-2013		Change 2003 to 2013 %pa
					Number	%	
Agriculture	193	209	260	290	31	11.8	4.2
Aquaculture	0	0	0	0	0	na	na
Forestry and Logging	51	74	72	63	-9	-12.7	2.1
Fishing Hunting and Trapping	0	0	0	0	0	na	-100.0
Agriculture Forestry and Fishing Support Services	48	28	36	36	0	0.0	-2.9
Coal Mining	3	1	1	1	0	-15.2	-11.7
Oil and Gas Extraction	0	0	0	0	0	na	na
Metal Ore Mining	0	0	0	0	0	na	na
Non-Metallic Mineral Mining and Quarrying	13	2	2	1	-1	-36.4	-20.0
Exploration and Other Mining Support Services	0	0	0	0	0	na	na
<i>Primary</i>	<i>309</i>	<i>314</i>	<i>371</i>	<i>392</i>	<i>20</i>	<i>5.5</i>	<i>2.4</i>
Food Product Manufacturing	170	147	151	146	-5	-3.4	-1.5
Beverage and Tobacco Product Manufacturing	0	0	0	0	0	2.6	na
Textile Leather Clothing and Footwear Manufacturing	5	4	1	4	3	404.4	-2.8
Wood Product Manufacturing	54	42	42	40	-2	-5.4	-3.1
Pulp Paper and Converted Paper Product Manufacturing	0	0	0	0	0	na	na
Printing	2	2	3	3	0	1.5	4.8
Petroleum and Coal Product Manufacturing	0	0	0	0	0	na	na
Basic Chemical and Chemical Product Manufacturing	0	1	1	1	0	24.9	na
Polymer Product and Rubber Product Manufacturing	4	4	3	5	2	57.7	2.4
Non-Metallic Mineral Product Manufacturing	5	5	6	6	0	3.7	3.0
Primary Metal and Metal Product Manufacturing	0	0	0	0	0	na	na
Fabricated Metal Product Manufacturing	7	6	6	6	0	-7.2	-1.9
Transport Equipment Manufacturing	4	3	2	3	1	22.8	-3.7
Machinery and Equipment Manufacturing	2	5	5	5	0	-9.6	7.2
Furniture and Other Manufacturing	1	0	0	0	0	na	-100.0
<i>Manufacturing</i>	<i>253</i>	<i>219</i>	<i>220</i>	<i>217</i>	<i>-2</i>	<i>-1.1</i>	<i>-1.5</i>
Building Construction	16	13	12	12	0	2.8	-2.6
Heavy and Civil Engineering Construction	15	16	16	17	1	3.4	0.8
Construction Services	7	11	11	9	-2	-22.2	1.8
<i>Construction</i>	<i>39</i>	<i>41</i>	<i>39</i>	<i>38</i>	<i>-2</i>	<i>-4.1</i>	<i>-0.3</i>
Basic Material Wholesaling	6	7	6	6	0	-4.1	0.3
Machinery and Equipment Wholesaling	2	2	3	4	1	56.2	6.2
Motor Vehicle and Motor Vehicle Parts Wholesaling	0	0	0	0	0	na	na
Grocery Liquor and Tobacco Product Wholesaling	1	0	0	1	1	na	1.9
Other Goods Wholesaling	0	1	1	1	0	0.1	na
Commission-Based Wholesaling	0	1	1	0	0	-49.6	1.4
Road Transport	35	29	29	29	0	-0.4	-1.8
Rail Transport	0	0	0	0	0	1.2	2.1
Water Transport	0	0	0	0	0	na	na
Air and Space Transport	0	0	0	0	0	na	na
Other Transport	0	0	0	0	0	na	na
Postal and Courier Pick-up and Delivery Services	2	2	3	2	0	-11.2	3.6
Transport Support Services	0	1	1	0	-1	-66.6	na
Warehousing and Storage Services	0	0	0	0	0	na	na
<i>Wholesale and Distribution</i>	<i>46</i>	<i>43</i>	<i>45</i>	<i>45</i>	<i>1</i>	<i>1.2</i>	<i>-0.2</i>
Motor Vehicle and Motor Vehicle Parts Retailing	2	3	4	5	1	13.6	10.1
Fuel Retailing	4	5	4	4	1	23.3	1.6
Food Retailing	10	14	15	17	2	13.5	6.1
Other Store-Based Retailing	9	11	12	11	-2	-13.6	2.0
Non-Store Retailing and Retail Commission Based Buying and/or Selling	0	0	0	0	0	na	-100.0
Accommodation	3	3	4	3	0	-12.2	1.9
Food and Beverage Services	5	6	5	5	0	5.0	-0.7
Repair and Maintenance	5	5	5	5	0	3.1	0.8
Personal and Other Services	2	3	3	3	0	9.9	6.9
Private Households Employing Staff	0	0	0	0	0	na	na
<i>Retail Trade and Services</i>	<i>39</i>	<i>50</i>	<i>53</i>	<i>55</i>	<i>2</i>	<i>4.0</i>	<i>3.4</i>
Electricity Supply	4	2	4	3	-1	-32.1	-2.2
Gas Supply	0	0	0	0	0	na	na
Water Supply Sewerage and Drainage Services	0	0	0	0	0	na	na
Waste Collection Treatment and Disposal Services	2	5	4	6	2	56.8	10.6
Publishing (except Internet and Music Publishing)	0	1	1	1	0	-3.0	5.3
Motion Picture and Sound Recording Activities	0	0	0	0	0	na	na
Broadcasting (except Internet)	0	0	0	0	0	na	na
Internet Publishing and Broadcasting	0	0	0	0	0	na	na
Telecommunications Services	3	0	0	0	0	na	-100.0
Internet Service Providers Web Search Portals and Data Processing Services	0	0	2	0	-2	-100.0	na
Library and Other Information Services	1	0	0	0	0	-2.5	-6.3
Finance	5	7	7	5	-2	-28.6	0.4
Insurance and Superannuation Funds	0	1	1	1	0	1.1	na
Auxiliary Finance and Insurance Services	0	0	0	1	0	2.6	3.2
Rental and Hiring Services (except Real Estate)	0	2	3	4	1	28.9	na
Property Operators and Real Estate Services	3	3	4	6	2	45.8	9.2
Professional Scientific and Technical Services (exc Comp Sys Dsn & related)	17	15	16	17	2	10.1	0.0
Computer System Design and Related Services	0	0	0	0	0	na	na
Administrative Services	0	1	1	1	0	-22.3	11.9
Building Cleaning Pest Control and Other Support Services	2	1	2	1	0	-16.9	-2.6
<i>Business Services</i>	<i>37</i>	<i>39</i>	<i>46</i>	<i>46</i>	<i>1</i>	<i>1.1</i>	<i>2.3</i>
Heritage Activities	0	0	0	0	0	-0.5	-0.9
Artistic Activities	0	0	0	0	0	na	na
Sport and Recreation Activities	3	2	1	1	0	-16.6	-10.0
Gambling Activities	0	0	0	0	0	na	na
<i>Arts and Recreation Services</i>	<i>3</i>	<i>3</i>	<i>1</i>	<i>1</i>	<i>0</i>	<i>-14.5</i>	<i>-9.1</i>
Public Administration	6	7	7	8	1	19.8	3.0
Defence	0	0	0	0	0	na	na
Public Order Safety and Regulatory Services	6	28	27	26	-1	-4.7	14.9
Preschool and School Education	19	19	18	21	3	16.3	0.7
Tertiary Education	0	3	1	2	1	130.0	na
Adult Community and Other Education	2	1	1	0	0	-16.2	-15.1
Hospitals	5	7	9	9	0	4.3	7.1
Medical and Other Health Care Services	10	7	6	6	0	-2.9	-4.5
Residential Care Services	7	9	9	10	1	8.9	4.0
Social Assistance Services	2	4	6	5	-1	-13.0	7.8
<i>Social Services</i>	<i>58</i>	<i>84</i>	<i>83</i>	<i>88</i>	<i>5</i>	<i>5.5</i>	<i>4.3</i>
<i>Subtotal</i>	<i>783</i>	<i>792</i>	<i>858</i>	<i>882</i>	<i>24</i>	<i>2.8</i>	<i>1.2</i>
Owner-Occupied Dwellings and Property Operators	99	108	108	108	0	0.0	0.9
TOTAL ALL INDUSTRIES	882	901	966	989	24	2.5	1.2
<i>Tourism sector</i>	<i>12</i>	<i>20</i>	<i>15</i>	<i>16</i>	<i>1</i>	<i>6.4</i>	<i>2.7</i>

Activity units for	2003	2011	2012	2013	change 2012-2013		Change 2003 to 2013, %
					Number	%	
Agriculture	1,381	1,243	1,237	1,201	-36	-2.9	-1.4
Aquaculture	0	1	1	1	0	0.0	na
Forestry and Logging	145	152	148	139	-9	-6.1	-0.4
Fishing Hunting and Trapping	18	11	7	7	0	0.0	-9.0
Agriculture Forestry and Fishing Support Services	125	117	127	131	4	3.1	0.5
Coal Mining	1	1	1	1	0	0.0	0.0
Oil and Gas Extraction	0	0	0	0	0	na	na
Metal Ore Mining	0	0	0	0	0	na	na
Non-Metallic Mineral Mining and Quarrying	3	4	4	4	0	0.0	2.9
Exploration and Other Mining Support Services	0	0	0	0	0	na	na
<i>Primary</i>	<i>1,673</i>	<i>1,529</i>	<i>1,525</i>	<i>1,484</i>	<i>-41</i>	<i>-2.7</i>	<i>-1.2</i>
Food Product Manufacturing	9	7	7	7	0	0.0	-2.5
Beverage and Tobacco Product Manufacturing	0	2	2	2	0	0.0	na
Textile Leather Clothing and Footwear Manufacturing	9	2	1	2	1	100.0	-14.0
Wood Product Manufacturing	16	17	16	18	2	12.5	1.2
Pulp Paper and Converted Paper Product Manufacturing	0	0	0	0	0	na	na
Printing	2	3	3	3	0	0.0	4.1
Petroleum and Coal Product Manufacturing	0	0	0	0	0	na	na
Basic Chemical and Chemical Product Manufacturing	0	1	2	2	0	0.0	na
Polymer Product and Rubber Product Manufacturing	1	1	1	1	0	0.0	0.0
Non-Metallic Mineral Product Manufacturing	3	4	3	4	1	33.3	2.9
Primary Metal and Metal Product Manufacturing	0	0	0	0	0	na	na
Fabricated Metal Product Manufacturing	9	12	12	13	1	8.3	3.7
Transport Equipment Manufacturing	3	5	4	4	0	0.0	2.9
Machinery and Equipment Manufacturing	14	7	7	8	1	14.3	-5.4
Furniture and Other Manufacturing	4	2	2	2	0	0.0	-6.7
<i>Manufacturing</i>	<i>70</i>	<i>63</i>	<i>60</i>	<i>66</i>	<i>6</i>	<i>10.0</i>	<i>-0.6</i>
Building Construction	46	57	56	58	2	3.6	2.3
Heavy and Civil Engineering Construction	17	10	9	9	0	0.0	-6.2
Construction Services	75	97	98	95	-3	-3.1	2.4
<i>Construction</i>	<i>138</i>	<i>164</i>	<i>163</i>	<i>162</i>	<i>-1</i>	<i>-0.6</i>	<i>1.6</i>
Basic Material Wholesaling	20	18	18	17	-1	-5.6	-1.6
Machinery and Equipment Wholesaling	3	6	6	7	1	16.7	8.8
Motor Vehicle and Motor Vehicle Parts Wholesaling	3	4	5	5	0	0.0	5.2
Grocery Liquor and Tobacco Product Wholesaling	5	2	1	2	1	100.0	-8.8
Other Goods Wholesaling	4	10	9	9	0	0.0	8.4
Commission-Based Wholesaling	6	5	4	3	-1	-25.0	-6.7
Road Transport	37	34	32	32	0	0.0	-1.4
Rail Transport	1	1	1	1	0	0.0	0.0
Water Transport	0	2	2	2	0	0.0	na
Air and Space Transport	0	0	0	0	0	na	na
Other Transport	2	3	4	4	0	0.0	7.2
Postal and Courier Pick-up and Delivery Services	11	10	12	10	-2	-16.7	-0.9
Transport Support Services	1	3	2	2	0	0.0	7.2
Warehousing and Storage Services	0	0	0	0	0	na	na
<i>Wholesale and Distribution</i>	<i>93</i>	<i>98</i>	<i>96</i>	<i>94</i>	<i>-2</i>	<i>-2.1</i>	<i>0.1</i>
Motor Vehicle and Motor Vehicle Parts Retailing	9	9	11	11	0	0.0	2.0
Fuel Retailing	10	10	9	10	1	11.1	0.0
Food Retailing	34	30	33	33	0	0.0	-0.3
Other Store-Based Retailing	69	62	62	64	2	3.2	-0.7
Non-Store Retailing and Retail Commission Based Buying and/or Selling	8	1	2	2	0	0.0	-12.9
Accommodation	32	39	42	45	3	7.1	3.5
Food and Beverage Services	37	42	40	41	1	2.5	1.0
Repair and Maintenance	37	35	37	35	-2	-5.4	-0.6
Personal and Other Services	30	48	48	47	-1	-2.1	4.6
Private Households Employing Staff	0	0	0	0	0	na	na
<i>Retail Trade and Services</i>	<i>266</i>	<i>276</i>	<i>284</i>	<i>288</i>	<i>4</i>	<i>1.4</i>	<i>0.8</i>
Electricity Supply	1	2	4	4	0	0.0	14.9
Gas Supply	0	0	0	0	0	na	na
Water Supply Sewerage and Drainage Services	0	0	0	0	0	na	na
Waste Collection Treatment and Disposal Services	3	4	4	4	0	0.0	2.9
Publishing (except Internet and Music Publishing)	1	2	2	2	0	0.0	7.2
Motion Picture and Sound Recording Activities	1	4	3	2	-1	-33.3	7.2
Broadcasting (except Internet)	1	0	0	0	0	na	-100.0
Internet Publishing and Broadcasting	0	0	0	0	0	na	na
Telecommunications Services	1	0	0	0	0	na	-100.0
Internet Service Providers Web Search Portals and Data Processing Services	0	1	1	1	0	0.0	na
Library and Other Information Services	4	4	4	4	0	0.0	0.0
Finance	15	73	83	97	14	16.9	20.5
Insurance and Superannuation Funds	2	2	2	2	0	0.0	0.0
Auxiliary Finance and Insurance Services	6	6	5	3	-2	-40.0	-6.7
Rental and Hiring Services (except Real Estate)	15	15	14	15	1	7.1	0.0
Property Operators and Real Estate Services	345	507	505	532	27	5.3	4.4
Professional Scientific and Technical Services (exc Comp Sys Dsn & related)	46	47	47	50	3	6.4	0.8
Computer System Design and Related Services	2	1	1	1	0	0.0	-6.7
Administrative Services	14	15	15	18	3	20.0	2.5
Building Cleaning Pest Control and Other Support Services	7	14	13	13	0	0.0	6.4
<i>Business Services</i>	<i>464</i>	<i>697</i>	<i>703</i>	<i>748</i>	<i>45</i>	<i>6.4</i>	<i>4.9</i>
Heritage Activities	2	4	4	5	1	25.0	9.6
Artistic Activities	5	2	2	4	2	100.0	-2.2
Sport and Recreation Activities	28	31	31	32	1	3.2	1.3
Gambling Activities	0	0	0	0	0	na	na
<i>Arts and Recreation Services</i>	<i>35</i>	<i>37</i>	<i>37</i>	<i>41</i>	<i>4</i>	<i>10.8</i>	<i>1.6</i>
Public Administration	13	11	11	11	0	0.0	-1.7
Defence	0	0	0	0	0	na	na
Public Order Safety and Regulatory Services	24	25	25	25	0	0.0	0.4
Preschool and School Education	40	41	42	42	0	0.0	0.5
Tertiary Education	0	2	2	2	0	0.0	na
Adult Community and Other Education	9	7	8	7	-1	-12.5	-2.5
Hospitals	2	2	2	2	0	0.0	0.0
Medical and Other Health Care Services	35	32	33	33	0	0.0	-0.6
Residential Care Services	6	4	4	4	0	0.0	-4.0
Social Assistance Services	5	8	7	8	1	14.3	4.8
<i>Social Services</i>	<i>134</i>	<i>132</i>	<i>134</i>	<i>134</i>	<i>0</i>	<i>0.0</i>	<i>0.0</i>
TOTAL ALL INDUSTRIES	2,873	2,996	3,002	3,017	15	0.5	0.5
<i>Tourism sector</i>	<i>49</i>	<i>100</i>	<i>76</i>	<i>80</i>	<i>5</i>	<i>6.1</i>	<i>5.1</i>

Table 8.8 Employment in Key Sectors, Clutha District, 2003 to 2013

Key sectors employment (FTEs)					%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Primary production	3,660	3,698	3,619	3,727	3.0	0.2
Primary processing	1,702	1,370	1,381	1,303	-5.7	-2.6
Creative	64	89	77	79	2.6	2.1
Education and research	396	453	393	476	21.2	1.9
Engineering, machinery and equipment manufacturing	39	72	79	73	-7.5	6.5
Key sectors (excluding Tourism)	5,861	5,682	5,548	5,657	2.0	-0.4
Non-key sectors	2,865	3,210	3,291	3,247	-1.4	1.3
Total employment: Clutha	8,726	8,891	8,839	8,904	0.7	0.2
Tourism sector	142	295	213	219	2.9	4.4

Source: BERL Regional Database 2013

Table 8.9 GDP in Key Sectors, Clutha District, 2003 to 2013

Key sectors GDP (2013\$m)					%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Primary production	309	314	371	392	5.5	2.4
Primary processing	224	189	193	186	-3.9	-1.9
Creative	2	3	3	3	16.9	5.0
Education and research	22	22	19	24	21.8	0.9
Engineering, machinery and equipment manufacturing	4	7	8	7	-6.5	6.9
Key sectors (excluding Tourism)	560	535	594	611	2.9	0.9
Non-key sectors	322	366	371	378	1.8	1.6
Total GDP: Clutha	882	901	966	989	2.5	1.2
Tourism sector	12	20	15	16	6.4	2.7

Source: BERL Regional Database 2013

Table 8.10 Business Units in Key Sectors, Clutha District, 2003 to 2013

Key sectors business units					%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Primary production	1,673	1,529	1,525	1,484	-2.7	-1.2
Primary processing	25	26	25	27	8.0	0.8
Creative	22	19	19	20	5.3	-0.9
Education and research	48	47	49	48	-2.0	0.0
Engineering, machinery and equipment manufacturing	21	15	16	18	12.5	-1.5
Key sectors (excluding Tourism)	1,789	1,636	1,634	1,597	-2.3	-1.1
Non-key sectors	1,084	1,360	1,368	1,420	3.8	2.7
Total business units: Clutha	2,873	2,996	3,002	3,017	0.5	0.5
Tourism sector	49	100	76	80	6.1	5.1

Source: BERL Regional Database 2013

8.8 Detailed tables - Dunedin City

Employment (FTEs) for	2003	2011	2012	2013	change 2012-2013		Change 2003 to 2013 %pa
					Number	%	
Agriculture	1,122	937	997	761	-236	-23.7	-3.8
Aquaculture	6	0	0	0	0	na	-100.0
Forestry and Logging	97	87	76	74	-2	-2.2	-2.6
Fishing Hunting and Trapping	31	17	17	23	6	36.7	-3.2
Agriculture Forestry and Fishing Support Services	178	158	187	211	24	12.8	1.7
Coal Mining	0	0	0	0	0	na	na
Oil and Gas Extraction	0	0	0	0	0	na	na
Metal Ore Mining	3	0	0	0	0	na	-100.0
Non-Metallic Mineral Mining and Quarrying	12	56	52	51	0	-0.4	15.3
Exploration and Other Mining Support Services	0	0	0	0	0	na	na
Primary	1,450	1,256	1,328	1,120	-208	-15.7	-2.5
Food Product Manufacturing	3,017	1,162	935	1,377	441	47.2	-7.5
Beverage and Tobacco Product Manufacturing	42	79	89	87	-2	-2.6	7.6
Textile Leather Clothing and Footwear Manufacturing	569	234	220	169	-51	-23.3	-11.4
Wood Product Manufacturing	340	277	316	274	-41	-13.1	-2.1
Pulp Paper and Converted Paper Product Manufacturing	77	49	30	27	-3	-10.2	-10.1
Printing	410	232	223	190	-33	-14.7	-7.4
Petroleum and Coal Product Manufacturing	3	61	62	61	0	-0.4	34.8
Basic Chemical and Chemical Product Manufacturing	146	86	95	127	31	32.8	-1.4
Polymer Product and Rubber Product Manufacturing	150	94	91	96	6	6.1	-4.3
Non-Metallic Mineral Product Manufacturing	108	93	93	88	-5	-4.8	-2.0
Primary Metal and Metal Product Manufacturing	129	100	140	151	11	7.6	1.6
Fabricated Metal Product Manufacturing	472	586	599	585	-14	-2.4	2.2
Transport Equipment Manufacturing	220	317	201	231	29	14.6	0.5
Machinery and Equipment Manufacturing	1,029	502	521	476	-45	-8.7	-7.4
Furniture and Other Manufacturing	132	209	200	183	-16	-8.2	3.3
Manufacturing	6,844	4,082	3,815	4,121	306	8.0	-4.9
Building Construction	574	1,000	988	1,029	40	4.1	6.0
Heavy and Civil Engineering Construction	865	991	953	848	-105	-11.1	-0.2
Construction Services	1,801	2,531	2,449	2,262	-188	-7.7	2.3
Construction	3,241	4,522	4,391	4,138	-253	-5.8	2.5
Basic Material Wholesaling	493	460	428	396	-32	-7.5	-2.2
Machinery and Equipment Wholesaling	488	547	597	643	46	7.7	2.8
Motor Vehicle and Motor Vehicle Parts Wholesaling	125	144	149	162	13	8.4	2.6
Grocery Liquor and Tobacco Product Wholesaling	561	646	688	698	11	1.6	2.2
Other Goods Wholesaling	238	263	272	326	54	19.7	3.2
Commission-Based Wholesaling	26	17	20	28	8	38.3	0.8
Road Transport	709	858	869	913	44	5.1	2.6
Rail Transport	46	50	56	50	-6	-10.4	0.8
Water Transport	18	8	7	0	-7	-100.0	-100.0
Air and Space Transport	43	50	51	50	-1	-2.5	1.6
Other Transport	58	74	79	81	2	2.8	3.5
Postal and Courier Pick-up and Delivery Services	482	298	333	333	-1	-0.2	-3.6
Transport Support Services	373	576	571	560	-11	-2.0	4.2
Warehousing and Storage Services	227	83	73	73	0	-0.4	-10.8
Wholesale and Distribution	3,887	4,074	4,195	4,312	118	2.8	1.0
Motor Vehicle and Motor Vehicle Parts Retailing	604	493	493	494	1	0.3	-2.0
Fuel Retailing	279	204	197	190	-6	-3.1	-3.8
Food Retailing	1,885	1,706	1,582	1,738	156	9.9	-0.8
Other Store-Based Retailing	3,343	2,866	2,897	2,860	-37	-1.3	-1.5
Non-Store Retailing and Retail Commission Based Buying and/or Selling	47	6	15	14	0	-2.0	-11.2
Accommodation	1,023	1,198	1,435	1,132	-303	-21.1	1.0
Food and Beverage Services	1,840	2,190	2,317	2,420	104	4.5	2.8
Repair and Maintenance	705	698	723	687	-35	-4.9	-0.2
Personal and Other Services	966	988	986	1,006	20	2.0	0.4
Private Households Employing Staff	0	0	0	0	0	na	na
Retail Trade and Services	10,693	10,349	10,644	10,543	-101	-0.9	-0.1
Electricity Supply	129	147	153	162	9	5.6	2.3
Gas Supply	3	22	28	20	-8	-28.3	20.6
Water Supply Sewerage and Drainage Services	98	111	107	100	-6	-5.7	0.2
Waste Collection Treatment and Disposal Services	66	34	72	80	8	11.2	2.0
Publishing (except Internet and Music Publishing)	643	608	523	515	-8	-1.6	-2.2
Motion Picture and Sound Recording Activities	134	109	122	120	-2	-1.9	-1.1
Broadcasting (except Internet)	92	103	108	100	-7	-6.6	0.9
Internet Publishing and Broadcasting	0	0	0	0	0	na	na
Telecommunications Services	51	73	68	53	-15	-22.2	0.4
Internet Service Providers Web Search Portals and Data Processing Services	36	21	9	10	1	10.7	-12.0
Library and Other Information Services	122	136	121	118	-3	-2.6	-0.3
Finance	841	542	532	500	-32	-6.0	-5.1
Insurance and Superannuation Funds	85	80	90	55	-34	-38.2	-4.2
Auxiliary Finance and Insurance Services	295	376	386	410	24	6.3	3.4
Rental and Hiring Services (except Real Estate)	163	267	264	274	11	4.0	5.3
Property Operators and Real Estate Services	304	399	348	423	74	21.4	3.4
Professional Scientific and Technical Services (exc Comp Sys Dsn & related)	1,748	2,737	2,849	2,763	-87	-3.0	4.7
Computer System Design and Related Services	114	204	188	220	32	17.2	6.8
Administrative Services	953	1,386	1,310	1,234	-75	-5.8	2.6
Building Cleaning Pest Control and Other Support Services	789	820	840	519	-321	-38.2	-4.1
Business Services	6,666	8,173	8,117	7,677	-440	-5.4	1.4
Heritage Activities	223	401	402	332	-70	-17.5	4.0
Artistic Activities	76	60	73	60	-14	-18.7	-2.4
Sport and Recreation Activities	455	611	634	502	-131	-20.8	1.0
Gambling Activities	185	172	198	195	-3	-1.4	0.5
Arts and Recreation Services	940	1,244	1,306	1,088	-218	-16.7	1.5
Public Administration	1,281	1,502	1,473	1,451	-23	-1.5	1.3
Defence	227	22	22	22	0	-0.4	-20.7
Public Order Safety and Regulatory Services	840	1,335	1,246	1,218	-28	-2.2	3.8
Preschool and School Education	2,045	2,273	2,116	2,354	238	11.2	1.4
Tertiary Education	3,625	4,367	4,191	4,313	121	2.9	1.8
Adult Community and Other Education	182	224	221	213	-8	-3.8	1.6
Hospitals	2,526	2,951	3,064	3,187	123	4.0	2.4
Medical and Other Health Care Services	983	1,465	1,443	1,456	14	0.9	4.0
Residential Care Services	1,170	1,340	1,523	1,532	9	0.6	2.7
Social Assistance Services	1,298	1,542	1,318	1,130	-288	-14.3	-1.4
Social Services	14,177	17,022	16,617	16,874	157	1.5	1.8
TOTAL ALL INDUSTRIES	47,897	50,722	50,413	49,874	-539	-1.1	0.4
Tourism sector	1,128	2,901	3,433	3,024	-409	-11.9	10.4

Real value added (GDP 2013\$m) for	2003	2011	2012	2013	change 2012-2013		Change 2003 to 2013 %
					Number	%	
Agriculture	78	65	91	76	-16	-17.0	-0.3
Aquaculture	0	0	0	0	0	na	-100.0
Forestry and Logging	33	42	37	39	2	4.8	1.6
Fishing Hunting and Trapping	2	1	1	1	0	21.8	-5.9
Agriculture Forestry and Fishing Support Services	13	9	11	11	0	0.5	-1.1
Coal Mining	0	0	0	0	0	na	na
Oil and Gas Extraction	0	0	0	0	0	na	na
Metal Ore Mining	1	0	0	0	0	na	-100.0
Non-Metallic Mineral Mining and Quarrying	3	5	3	4	0	6.0	3.2
Exploration and Other Mining Support Services	0	0	0	0	0	na	na
<i>Primary</i>	<i>130</i>	<i>122</i>	<i>144</i>	<i>131</i>	<i>-13</i>	<i>-9.2</i>	<i>0.1</i>
Food Product Manufacturing	392	153	124	188	64	51.6	-7.1
Beverage and Tobacco Product Manufacturing	5	10	12	12	0	0.3	8.1
Textile Leather Clothing and Footwear Manufacturing	37	21	19	17	-2	-10.3	-7.5
Wood Product Manufacturing	47	47	55	47	-8	-15.2	0.0
Pulp Paper and Converted Paper Product Manufacturing	11	8	5	5	-1	-12.4	-8.1
Printing	15	10	11	9	-2	-19.4	-5.4
Petroleum and Coal Product Manufacturing	1	16	16	20	4	25.9	38.2
Basic Chemical and Chemical Product Manufacturing	36	23	24	40	16	67.9	1.1
Polymer Product and Rubber Product Manufacturing	37	25	23	31	8	34.2	-1.9
Non-Metallic Mineral Product Manufacturing	19	15	15	15	0	2.6	-2.1
Primary Metal and Metal Product Manufacturing	17	11	15	16	1	8.1	-0.6
Fabricated Metal Product Manufacturing	64	62	65	64	-1	-1.9	0.0
Transport Equipment Manufacturing	19	31	20	24	3	17.1	2.1
Machinery and Equipment Manufacturing	90	50	52	49	-4	-6.7	-5.9
Furniture and Other Manufacturing	9	14	14	13	-1	-7.7	3.4
<i>Manufacturing</i>	<i>800</i>	<i>496</i>	<i>469</i>	<i>547</i>	<i>78</i>	<i>16.7</i>	<i>-3.7</i>
Building Construction	39	64	59	69	10	17.4	5.7
Heavy and Civil Engineering Construction	59	64	57	57	0	0.3	-0.5
Construction Services	124	163	145	151	6	4.1	2.0
<i>Construction</i>	<i>223</i>	<i>291</i>	<i>261</i>	<i>277</i>	<i>16</i>	<i>6.3</i>	<i>2.2</i>
Basic Material Wholesaling	55	54	50	47	-3	-6.4	-1.6
Machinery and Equipment Wholesaling	55	64	70	77	6	9.0	3.4
Motor Vehicle and Motor Vehicle Parts Wholesaling	14	17	18	19	2	9.7	3.2
Grocery Liquor and Tobacco Product Wholesaling	63	75	81	83	2	2.8	2.8
Other Goods Wholesaling	27	31	32	39	7	21.2	3.8
Commission-Based Wholesaling	3	2	2	3	1	40.0	1.4
Road Transport	91	126	125	133	8	6.8	3.9
Rail Transport	6	7	8	7	-1	-8.9	2.1
Water Transport	2	1	1	0	-1	-100.0	-100.0
Air and Space Transport	5	7	7	7	0	-0.9	3.0
Other Transport	7	11	11	12	1	4.5	4.8
Postal and Courier Pick-up and Delivery Services	62	44	48	49	1	1.4	-2.4
Transport Support Services	48	84	82	82	0	-0.4	5.5
Warehousing and Storage Services	29	12	10	11	0	1.2	-9.6
<i>Wholesale and Distribution</i>	<i>467</i>	<i>534</i>	<i>546</i>	<i>569</i>	<i>22</i>	<i>4.1</i>	<i>2.0</i>
Motor Vehicle and Motor Vehicle Parts Retailing	28	33	35	36	1	3.0	2.8
Fuel Retailing	13	14	14	14	0	-0.4	0.9
Food Retailing	86	114	113	128	15	12.9	4.0
Other Store-Based Retailing	152	191	207	210	3	1.5	3.3
Non-Store Retailing and Retail Commission Based Buying and/or Selling	2	0	1	1	0	0.7	-6.9
Accommodation	34	39	47	36	-10	-22.2	0.6
Food and Beverage Services	61	72	75	77	2	3.0	2.4
Repair and Maintenance	36	34	35	33	-2	-4.8	-0.8
Personal and Other Services	49	48	48	49	1	2.2	-0.1
Private Households Employing Staff	0	0	0	0	0	na	na
<i>Retail Trade and Services</i>	<i>461</i>	<i>544</i>	<i>574</i>	<i>584</i>	<i>10</i>	<i>1.7</i>	<i>2.4</i>
Electricity Supply	58	54	54	52	-3	-4.7	-1.1
Gas Supply	1	8	10	6	-4	-35.3	16.5
Water Supply Sewerage and Drainage Services	44	41	38	32	-6	-14.9	-3.1
Waste Collection Treatment and Disposal Services	30	13	26	26	0	0.3	-1.4
Publishing (except Internet and Music Publishing)	24	25	26	24	-2	-7.1	-0.1
Motion Picture and Sound Recording Activities	11	8	8	9	0	2.3	-2.4
Broadcasting (except Internet)	8	7	7	7	0	-2.6	-0.4
Internet Publishing and Broadcasting	0	0	0	0	0	na	na
Telecommunications Services	51	80	67	57	-10	-14.7	1.2
Internet Service Providers Web Search Portals and Data Processing Services	36	23	9	11	2	21.4	-11.2
Library and Other Information Services	6	7	6	6	0	-2.5	-0.8
Finance	114	88	86	82	-4	-4.5	-3.2
Insurance and Superannuation Funds	11	13	15	9	-5	-37.3	-2.3
Auxiliary Finance and Insurance Services	40	61	62	68	5	8.1	5.4
Rental and Hiring Services (except Real Estate)	40	68	68	71	3	5.0	6.0
Property Operators and Real Estate Services	32	44	38	47	9	22.3	3.9
Professional Scientific and Technical Services (exc Comp Sys Dsn & related)	189	250	268	259	-9	-3.4	3.2
Computer System Design and Related Services	12	19	18	21	3	16.8	5.3
Administrative Services	51	63	59	57	-2	-3.2	1.1
Building Cleaning Pest Control and Other Support Services	42	37	38	24	-14	-36.5	-5.6
<i>Business Services</i>	<i>801</i>	<i>907</i>	<i>902</i>	<i>867</i>	<i>-36</i>	<i>-3.9</i>	<i>0.8</i>
Heritage Activities	18	29	28	24	-4	-13.9	2.7
Artistic Activities	6	4	5	4	-1	-15.1	-3.7
Sport and Recreation Activities	38	44	44	36	-8	-17.3	-0.3
Gambling Activities	9	8	10	9	0	-1.2	0.0
<i>Arts and Recreation Services</i>	<i>72</i>	<i>85</i>	<i>86</i>	<i>74</i>	<i>-12</i>	<i>-14.3</i>	<i>0.3</i>
Public Administration	105	143	136	133	-2	-1.8	2.5
Defence	15	2	2	2	0	-0.5	-19.8
Public Order Safety and Regulatory Services	54	98	90	88	-2	-2.3	5.0
Preschool and School Education	112	111	105	117	12	11.8	0.5
Tertiary Education	199	213	208	215	7	3.4	0.8
Adult Community and Other Education	10	11	11	11	0	-3.3	0.6
Hospitals	197	235	235	250	15	6.2	2.4
Medical and Other Health Care Services	77	117	111	114	3	3.1	4.1
Residential Care Services	91	107	117	120	3	2.8	2.8
Social Assistance Services	66	74	64	55	-9	-14.2	-1.9
<i>Social Services</i>	<i>925</i>	<i>1,109</i>	<i>1,078</i>	<i>1,105</i>	<i>27</i>	<i>2.5</i>	<i>1.8</i>
<i>Subtotal</i>	<i>3,878</i>	<i>4,089</i>	<i>4,062</i>	<i>4,154</i>	<i>92</i>	<i>2.3</i>	<i>0.7</i>
<i>Owner-Occupied Dwellings and Property Operators</i>	<i>678</i>	<i>769</i>	<i>763</i>	<i>767</i>	<i>4</i>	<i>0.5</i>	<i>1.2</i>
TOTAL ALL INDUSTRIES	4,557	4,858	4,825	4,921	96	2.0	0.8
<i>Tourism sector</i>	<i>133</i>	<i>199</i>	<i>226</i>	<i>206</i>	<i>-20</i>	<i>-9.0</i>	<i>4.5</i>

Activity units for	2003	2011	2012	2013	change 2012-2013		Change 2003 to 2013 %pa
					Number	%	
Agriculture	833	680	695	673	-22	-3.2	-2.1
Aquaculture	4	2	2	2	0	0.0	-6.7
Forestry and Logging	129	127	116	110	-6	-5.2	-1.6
Fishing Hunting and Trapping	68	49	47	46	-1	-2.1	-3.8
Agriculture Forestry and Fishing Support Services	94	82	93	85	-8	-8.6	-1.0
Coal Mining	0	0	0	0	0	na	na
Oil and Gas Extraction	0	0	1	0	-1	-100.0	na
Metal Ore Mining	3	2	2	2	0	0.0	-4.0
Non-Metallic Mineral Mining and Quarrying	4	7	7	7	0	0.0	5.8
Exploration and Other Mining Support Services	2	3	4	7	3	75.0	13.3
<i>Primary</i>	<i>1,137</i>	<i>952</i>	<i>967</i>	<i>932</i>	<i>-35</i>	<i>-3.6</i>	<i>-2.0</i>
Food Product Manufacturing	73	66	67	70	3	4.5	-0.4
Beverage and Tobacco Product Manufacturing	7	7	7	8	1	14.3	1.3
Textile Leather Clothing and Footwear Manufacturing	50	41	38	37	-1	-2.6	-3.0
Wood Product Manufacturing	49	45	46	45	-1	-2.2	-0.8
Pulp Paper and Converted Paper Product Manufacturing	3	2	3	3	0	0.0	0.0
Printing	27	24	23	28	5	21.7	0.4
Petroleum and Coal Product Manufacturing	2	2	2	2	0	0.0	0.0
Basic Chemical and Chemical Product Manufacturing	14	12	11	13	2	18.2	-0.7
Polymer Product and Rubber Product Manufacturing	14	12	12	12	0	0.0	-1.5
Non-Metallic Mineral Product Manufacturing	20	16	16	16	0	0.0	-2.2
Primary Metal and Metal Product Manufacturing	6	7	6	6	0	0.0	0.0
Fabricated Metal Product Manufacturing	82	79	77	76	-1	-1.3	-0.8
Transport Equipment Manufacturing	32	37	35	34	-1	-2.9	0.6
Machinery and Equipment Manufacturing	77	76	78	78	0	0.0	0.1
Furniture and Other Manufacturing	47	43	39	40	1	2.6	-1.6
<i>Manufacturing</i>	<i>503</i>	<i>469</i>	<i>460</i>	<i>468</i>	<i>8</i>	<i>1.7</i>	<i>-0.7</i>
Building Construction	217	343	347	343	-4	-1.2	4.7
Heavy and Civil Engineering Construction	24	27	26	27	1	3.8	1.2
Construction Services	573	649	629	632	3	0.5	1.0
<i>Construction</i>	<i>814</i>	<i>1,019</i>	<i>1,002</i>	<i>1,002</i>	<i>0</i>	<i>0.0</i>	<i>2.1</i>
Basic Material Wholesaling	91	92	88	91	3	3.4	0.0
Machinery and Equipment Wholesaling	117	115	115	124	9	7.8	0.6
Motor Vehicle and Motor Vehicle Parts Wholesaling	50	46	48	45	-3	-6.3	-1.0
Grocery Liquor and Tobacco Product Wholesaling	57	49	52	50	-2	-3.8	-1.3
Other Goods Wholesaling	106	77	79	78	-1	-1.3	-3.0
Commission-Based Wholesaling	17	8	9	9	0	0.0	-6.2
Road Transport	231	233	209	222	13	6.2	-0.4
Rail Transport	2	1	1	1	0	0.0	-6.7
Water Transport	3	3	3	3	0	0.0	0.0
Air and Space Transport	10	7	7	7	0	0.0	-3.5
Other Transport	9	11	10	9	-1	-10.0	0.0
Postal and Courier Pick-up and Delivery Services	101	103	97	96	-1	-1.0	-0.5
Transport Support Services	31	34	34	39	5	14.7	2.3
Warehousing and Storage Services	16	11	9	10	1	11.1	-4.6
<i>Wholesale and Distribution</i>	<i>841</i>	<i>790</i>	<i>761</i>	<i>784</i>	<i>23</i>	<i>3.0</i>	<i>-0.7</i>
Motor Vehicle and Motor Vehicle Parts Retailing	82	86	90	91	1	1.1	1.0
Fuel Retailing	37	23	22	22	0	0.0	-5.1
Food Retailing	130	120	121	124	3	2.5	-0.5
Other Store-Based Retailing	517	539	545	529	-16	-2.9	0.2
Non-Store Retailing and Retail Commission Based Buying and/or Selling	29	37	35	36	1	2.9	2.2
Accommodation	128	137	138	141	3	2.2	1.0
Food and Beverage Services	353	408	421	438	17	4.0	2.2
Repair and Maintenance	238	231	233	232	-1	-0.4	-0.3
Personal and Other Services	319	351	350	359	9	2.6	1.2
Private Households Employing Staff	0	0	0	0	0	na	na
<i>Retail Trade and Services</i>	<i>1,833</i>	<i>1,932</i>	<i>1,955</i>	<i>1,972</i>	<i>17</i>	<i>0.9</i>	<i>0.7</i>
Electricity Supply	4	4	4	4	0	0.0	0.0
Gas Supply	1	2	2	3	1	50.0	11.6
Water Supply Sewerage and Drainage Services	3	5	5	5	0	0.0	5.2
Waste Collection Treatment and Disposal Services	17	16	15	15	0	0.0	-1.2
Publishing (except Internet and Music Publishing)	11	19	20	17	-3	-15.0	4.4
Motion Picture and Sound Recording Activities	31	42	43	37	-6	-14.0	1.8
Broadcasting (except Internet)	10	9	9	10	1	11.1	0.0
Internet Publishing and Broadcasting	0	0	0	0	0	na	na
Telecommunications Services	7	8	7	7	0	0.0	0.0
Internet Service Providers Web Search Portals and Data Processing Services	5	10	8	10	2	25.0	7.2
Library and Other Information Services	8	6	7	7	0	0.0	-1.3
Finance	191	570	580	616	36	6.2	12.4
Insurance and Superannuation Funds	51	30	32	32	0	0.0	-4.6
Auxiliary Finance and Insurance Services	109	130	123	112	-11	-8.9	0.3
Rental and Hiring Services (except Real Estate)	138	120	129	130	1	0.8	-0.6
Property Operators and Real Estate Services	1,272	1,929	1,945	2,027	82	4.2	4.8
Professional Scientific and Technical Services (exc Comp Sys Dsn & related)	640	785	800	800	0	0.0	2.3
Computer System Design and Related Services	72	114	116	120	4	3.4	5.2
Administrative Services	112	152	150	165	15	10.0	4.0
Building Cleaning Pest Control and Other Support Services	121	150	155	160	5	3.2	2.8
<i>Business Services</i>	<i>2,803</i>	<i>4,101</i>	<i>4,150</i>	<i>4,277</i>	<i>127</i>	<i>3.1</i>	<i>4.3</i>
Heritage Activities	13	20	21	22	1	4.8	5.4
Artistic Activities	55	70	66	65	-1	-1.5	1.7
Sport and Recreation Activities	177	181	177	174	-3	-1.7	-0.2
Gambling Activities	10	8	9	8	-1	-11.1	-2.2
<i>Arts and Recreation Services</i>	<i>255</i>	<i>279</i>	<i>273</i>	<i>269</i>	<i>-4</i>	<i>-1.5</i>	<i>0.5</i>
Public Administration	66	45	45	44	-1	-2.2	-4.0
Defence	3	2	2	2	0	0.0	-4.0
Public Order Safety and Regulatory Services	66	73	69	65	-4	-5.8	-0.2
Preschool and School Education	163	158	154	150	-4	-2.6	-0.8
Tertiary Education	22	26	29	25	-4	-13.8	1.3
Adult Community and Other Education	68	95	95	94	-1	-1.1	3.3
Hospitals	8	8	8	8	0	0.0	0.0
Medical and Other Health Care Services	398	536	540	532	-8	-1.5	2.9
Residential Care Services	61	56	56	53	-3	-5.4	-1.4
Social Assistance Services	78	95	92	94	2	2.2	1.9
<i>Social Services</i>	<i>933</i>	<i>1,094</i>	<i>1,090</i>	<i>1,067</i>	<i>-23</i>	<i>-2.1</i>	<i>1.4</i>
TOTAL ALL INDUSTRIES	9,119	10,636	10,658	10,771	113	1.1	1.7
<i>Tourism sector</i>	<i>276</i>	<i>484</i>	<i>554</i>	<i>515</i>	<i>-39</i>	<i>-7.0</i>	<i>6.4</i>

Table 8.11 Employment in Key Sectors, Dunedin City, 2003 to 2013

Key sectors employment (FTEs)					%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Primary production	1,450	1,256	1,328	1,120	-15.7	-2.5
Primary processing	3,399	1,518	1,340	1,738	29.7	-6.5
Creative	1,655	1,383	1,331	1,284	-3.5	-2.5
Education and research	6,057	7,201	6,832	7,169	4.9	1.7
Engineering, machinery and equipment manufacturing	714	816	882	831	-5.7	1.5
Key sectors (excluding Tourism)	13,274	12,174	11,713	12,142	3.7	-0.9
Non-key sectors	34,623	38,548	38,700	37,732	-2.5	0.9
Total employment: Dunedin City	47,897	50,722	50,413	49,874	-1.1	0.4
Tourism sector	1,128	2,901	3,433	3,024	-11.9	10.4

Source: BERL Regional Database 2013

Table 8.12 GDP in Key Sectors, Dunedin City, 2003 to 2013

Key sectors GDP (2013\$m)					%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Primary production	130	122	144	131	-9.2	0.1
Primary processing	444	210	191	246	29.2	-5.7
Creative	55	44	47	47	-0.4	-1.5
Education and research	343	366	354	371	5.1	0.8
Engineering, machinery and equipment manufacturing	67	76	84	80	-5.0	1.8
Key sectors (excluding Tourism)	1,039	818	820	875	6.8	-1.7
Non-key sectors	3,518	4,040	4,005	4,045	1.0	1.4
Total GDP: Dunedin City	4,557	4,858	4,825	4,921	2.0	0.8
Tourism sector	133	199	226	206	-9.0	4.5

Source: BERL Regional Database 2013

Table 8.13 Business Units in Key Sectors, Dunedin City, 2003 to 2013

Key sectors business units					%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Primary production	1,137	952	967	932	-3.6	-2.0
Primary processing	129	118	120	123	2.5	-0.5
Creative	325	359	363	362	-0.3	1.1
Education and research	291	336	333	327	-1.8	1.2
Engineering, machinery and equipment manufacturing	144	166	170	169	-0.6	1.6
Key sectors (excluding Tourism)	2,026	1,931	1,953	1,913	-2.0	-0.6
Non-key sectors	7,093	8,705	8,705	8,858	1.8	2.2
Total business units: Dunedin City	9,119	10,636	10,658	10,771	1.1	1.7
Tourism sector	276	484	554	515	-7.0	6.4

Source: BERL Regional Database 2013

8.9 Detailed tables - Queenstown-Lakes District

Employment (FTEs) for	2003	2011	2012	2013	change 2012-2013		Change 2003 to 2013 %pa
					Number	%	
Agriculture	520	394	380	406	26	6.8	-2.4
Aquaculture	0	0	0	0	0	na	na
Forestry and Logging	0	0	0	0	0	na	na
Fishing Hunting and Trapping	2	5	5	3	-2	-46.8	0.4
Agriculture Forestry and Fishing Support Services	65	84	66	73	7	11.3	1.2
Coal Mining	0	0	0	0	0	na	na
Oil and Gas Extraction	0	0	0	0	0	na	na
Metal Ore Mining	9	0	0	0	0	na	-100.0
Non-Metallic Mineral Mining and Quarrying	22	17	10	7	-3	-33.6	-11.1
Exploration and Other Mining Support Services	0	7	0	0	0	na	na
<i>Primary</i>	<i>619</i>	<i>506</i>	<i>461</i>	<i>489</i>	<i>28</i>	<i>6.0</i>	<i>-2.3</i>
Food Product Manufacturing	66	104	191	182	-9	-4.9	10.6
Beverage and Tobacco Product Manufacturing	117	74	89	83	-6	-7.1	-3.4
Textile Leather Clothing and Footwear Manufacturing	24	9	12	12	0	-0.5	-6.8
Wood Product Manufacturing	39	32	24	30	5	21.2	-2.9
Pulp Paper and Converted Paper Product Manufacturing	0	0	0	0	0	na	na
Printing	26	43	38	30	-8	-22.2	1.5
Petroleum and Coal Product Manufacturing	0	0	0	0	0	na	na
Basic Chemical and Chemical Product Manufacturing	3	12	9	15	6	64.7	18.0
Polymer Product and Rubber Product Manufacturing	6	8	0	3	3	na	-6.8
Non-Metallic Mineral Product Manufacturing	14	26	22	24	2	10.0	5.5
Primary Metal and Metal Product Manufacturing	3	10	10	13	3	32.8	15.8
Fabricated Metal Product Manufacturing	12	52	41	58	17	40.6	17.2
Transport Equipment Manufacturing	35	36	42	57	15	35.7	5.0
Machinery and Equipment Manufacturing	36	26	30	41	11	37.9	1.4
Furniture and Other Manufacturing	23	27	18	18	0	-1.3	-2.6
<i>Manufacturing</i>	<i>404</i>	<i>461</i>	<i>526</i>	<i>564</i>	<i>38</i>	<i>7.2</i>	<i>3.4</i>
Building Construction	584	593	578	639	61	10.6	0.9
Heavy and Civil Engineering Construction	57	155	185	130	-55	-29.5	8.7
Construction Services	747	1,176	1,124	1,087	-37	-3.3	3.8
<i>Construction</i>	<i>1,387</i>	<i>1,924</i>	<i>1,887</i>	<i>1,857</i>	<i>-31</i>	<i>-1.6</i>	<i>3.0</i>
Basic Material Wholesaling	51	25	31	28	-3	-9.4	-5.9
Machinery and Equipment Wholesaling	29	54	106	125	19	17.8	15.7
Motor Vehicle and Motor Vehicle Parts Wholesaling	3	9	9	10	1	12.1	12.5
Grocery Liquor and Tobacco Product Wholesaling	88	94	137	127	-10	-7.3	3.8
Other Goods Wholesaling	28	37	15	23	8	58.3	-1.9
Commission-Based Wholesaling	6	0	3	0	-3	-100.0	-100.0
Road Transport	163	182	204	216	12	5.9	2.8
Rail Transport	9	0	0	0	0	na	-100.0
Water Transport	3	3	14	12	-2	-12.7	16.2
Air and Space Transport	114	110	123	120	-3	-2.5	0.6
Other Transport	221	155	171	186	15	8.6	-1.7
Postal and Courier Pick-up and Delivery Services	49	77	36	46	11	30.2	-0.5
Transport Support Services	32	41	50	46	-4	-7.6	3.8
Warehousing and Storage Services	0	3	3	3	0	-0.4	na
<i>Wholesale and Distribution</i>	<i>796</i>	<i>791</i>	<i>902</i>	<i>943</i>	<i>41</i>	<i>4.6</i>	<i>1.7</i>
Motor Vehicle and Motor Vehicle Parts Retailing	44	37	36	42	6	17.7	-0.4
Fuel Retailing	107	51	58	54	-4	-6.3	-6.6
Food Retailing	485	579	572	609	37	6.4	2.3
Other Store-Based Retailing	1,144	1,081	1,104	1,127	23	2.0	-0.2
Non-Store Retailing and Retail Commission Based Buying and/or Selling	3	18	20	24	4	17.6	23.8
Accommodation	1,698	2,029	2,220	2,141	-79	-3.6	2.3
Food and Beverage Services	1,220	1,713	1,775	1,988	212	12.0	5.0
Repair and Maintenance	108	165	170	173	2	1.3	4.8
Personal and Other Services	135	199	223	240	17	7.7	5.9
Private Households Employing Staff	0	0	0	0	0	na	na
<i>Retail Trade and Services</i>	<i>4,944</i>	<i>5,871</i>	<i>6,180</i>	<i>6,399</i>	<i>219</i>	<i>3.5</i>	<i>2.6</i>
Electricity Supply	0	0	0	0	0	na	na
Gas Supply	0	0	3	3	0	-0.4	na
Water Supply Sewerage and Drainage Services	6	0	0	0	0	na	-100.0
Waste Collection Treatment and Disposal Services	29	60	62	63	1	1.4	8.1
Publishing (except Internet and Music Publishing)	42	76	75	71	-5	-6.2	5.2
Motion Picture and Sound Recording Activities	57	62	66	61	-4	-6.3	0.8
Broadcasting (except Internet)	29	20	22	17	-6	-25.3	-5.3
Internet Publishing and Broadcasting	0	3	0	0	0	na	na
Telecommunications Services	3	9	3	0	-3	-100.0	-100.0
Internet Service Providers Web Search Portals and Data Processing Services	19	9	7	6	-1	-11.4	-10.9
Library and Other Information Services	15	23	18	17	0	-2.6	1.3
Finance	106	205	217	203	-14	-6.3	6.7
Insurance and Superannuation Funds	3	6	6	3	-3	-50.3	1.1
Auxiliary Finance and Insurance Services	22	67	62	63	1	1.0	11.1
Rental and Hiring Services (except Real Estate)	100	191	274	274	0	0.2	10.6
Property Operators and Real Estate Services	188	232	260	333	73	28.1	5.9
Professional Scientific and Technical Services (exc Comp Sys Dsn & related)	366	679	696	789	93	13.4	8.0
Computer System Design and Related Services	9	56	57	79	21	36.9	23.8
Administrative Services	485	751	846	854	9	1.0	5.8
Building Cleaning Pest Control and Other Support Services	71	184	160	193	34	21.1	10.6
<i>Business Services</i>	<i>1,550</i>	<i>2,634</i>	<i>2,833</i>	<i>3,029</i>	<i>196</i>	<i>6.9</i>	<i>6.9</i>
Heritage Activities	81	138	122	103	-19	-15.2	2.5
Artistic Activities	4	22	15	12	-3	-18.3	10.6
Sport and Recreation Activities	472	742	790	673	-117	-14.8	3.6
Gambling Activities	91	42	92	93	1	1.0	0.2
<i>Arts and Recreation Services</i>	<i>648</i>	<i>945</i>	<i>1,019</i>	<i>881</i>	<i>-137</i>	<i>-13.5</i>	<i>3.1</i>
Public Administration	51	229	229	239	10	4.4	16.8
Defence	0	0	0	0	0	na	na
Public Order Safety and Regulatory Services	97	151	203	203	0	-0.1	7.6
Preschool and School Education	270	463	490	513	23	4.7	6.7
Tertiary Education	0	52	73	58	-15	-20.0	na
Adult Community and Other Education	57	88	63	60	-3	-4.3	0.6
Hospitals	25	76	67	68	1	2.1	10.4
Medical and Other Health Care Services	115	207	207	212	5	2.5	6.3
Residential Care Services	48	87	85	97	12	14.7	7.4
Social Assistance Services	17	36	48	84	36	75.4	17.2
<i>Social Services</i>	<i>680</i>	<i>1,390</i>	<i>1,464</i>	<i>1,534</i>	<i>71</i>	<i>4.8</i>	<i>8.5</i>
TOTAL ALL INDUSTRIES	11,027	14,521	15,272	15,695	424	2.8	3.6
<i>Tourism sector</i>	<i>3231.4</i>	<i>4,487</i>	<i>4,869</i>	<i>5,102</i>	<i>233</i>	<i>4.8</i>	<i>4.7</i>

Real value added (GDP 2013\$m) for	2003	2011	2012	2013	change 2012-2013		Change 2003 to 2013 %pa
					Number	%	
Agriculture	36	27	35	40	6	16.0	1.1
Aquaculture	0	0	0	0	0	na	na
Forestry and Logging	0	0	0	0	0	na	na
Fishing Hunting and Trapping	0	0	0	0	0	-52.6	-2.4
Agriculture Forestry and Fishing Support Services	5	5	4	4	0	-0.8	-1.6
Coal Mining	0	0	0	0	0	na	na
Oil and Gas Extraction	0	0	0	0	0	na	na
Metal Ore Mining	2	0	0	0	0	na	-100.0
Non-Metallic Mineral Mining and Quarrying	5	1	1	0	0	-29.3	-20.4
Exploration and Other Mining Support Services	0	1	0	0	0	na	na
<i>Primary</i>	<i>48</i>	<i>34</i>	<i>40</i>	<i>45</i>	<i>5</i>	<i>13.1</i>	<i>-0.6</i>
Food Product Manufacturing	9	14	25	25	-1	-2.1	11.1
Beverage and Tobacco Product Manufacturing	15	10	12	11	-1	-4.3	-2.9
Textile Leather Clothing and Footwear Manufacturing	2	1	1	1	0	16.4	-2.7
Wood Product Manufacturing	5	5	4	5	1	18.3	-0.8
Pulp Paper and Converted Paper Product Manufacturing	0	0	0	0	0	na	na
Printing	1	2	2	1	0	-26.5	3.7
Petroleum and Coal Product Manufacturing	0	0	0	0	0	na	na
Basic Chemical and Chemical Product Manufacturing	1	3	2	5	2	108.2	21.0
Polymer Product and Rubber Product Manufacturing	1	2	0	1	1	na	-4.5
Non-Metallic Mineral Product Manufacturing	2	4	3	4	1	18.6	5.4
Primary Metal and Metal Product Manufacturing	0	1	1	1	0	33.5	13.3
Fabricated Metal Product Manufacturing	2	5	4	6	2	41.4	14.7
Transport Equipment Manufacturing	3	4	4	6	2	38.7	6.7
Machinery and Equipment Manufacturing	3	3	3	4	1	40.9	3.0
Furniture and Other Manufacturing	2	2	1	1	0	-0.8	-2.5
<i>Manufacturing</i>	<i>46</i>	<i>56</i>	<i>64</i>	<i>72</i>	<i>8</i>	<i>13.2</i>	<i>4.6</i>
Building Construction	40	38	34	43	8	24.7	0.6
Heavy and Civil Engineering Construction	4	10	11	9	-2	-20.5	8.4
Construction Services	51	76	67	73	6	9.0	3.6
<i>Construction</i>	<i>95</i>	<i>124</i>	<i>112</i>	<i>124</i>	<i>12</i>	<i>10.9</i>	<i>2.7</i>
Basic Material Wholesaling	6	3	4	3	0	-8.3	-5.3
Machinery and Equipment Wholesaling	3	6	12	15	2	19.3	16.4
Motor Vehicle and Motor Vehicle Parts Wholesaling	0	1	1	1	0	13.5	13.2
Grocery Liquor and Tobacco Product Wholesaling	10	11	16	15	-1	-6.1	4.4
Other Goods Wholesaling	3	4	2	3	1	60.2	-1.3
Commission-Based Wholesaling	1	0	0	0	0	-100.0	-100.0
Road Transport	21	27	29	31	2	7.7	4.2
Rail Transport	1	0	0	0	0	na	-100.0
Water Transport	0	0	2	2	0	-11.3	17.7
Air and Space Transport	15	16	18	18	0	-0.9	1.9
Other Transport	28	23	25	27	3	10.4	-0.4
Postal and Courier Pick-up and Delivery Services	6	11	5	7	2	32.4	0.7
Transport Support Services	4	6	7	7	0	-6.1	5.1
Warehousing and Storage Services	0	0	0	0	0	1.2	na
<i>Wholesale and Distribution</i>	<i>99</i>	<i>109</i>	<i>122</i>	<i>129</i>	<i>8</i>	<i>6.2</i>	<i>2.7</i>
Motor Vehicle and Motor Vehicle Parts Retailing	2	2	3	3	1	21.0	4.5
Fuel Retailing	5	3	4	4	0	-3.7	-2.0
Food Retailing	22	39	41	45	4	9.4	7.3
Other Store-Based Retailing	52	72	79	83	4	4.9	4.7
Non-Store Retailing and Retail Commission Based Buying and/or Selling	0	1	1	2	0	20.9	29.8
Accommodation	56	66	72	68	-4	-4.9	1.9
Food and Beverage Services	41	56	58	64	6	10.4	4.6
Repair and Maintenance	6	8	8	8	0	1.4	4.3
Personal and Other Services	7	10	11	12	1	7.9	5.4
Private Households Employing Staff	0	0	0	0	0	na	na
<i>Retail Trade and Services</i>	<i>191</i>	<i>258</i>	<i>276</i>	<i>288</i>	<i>12</i>	<i>4.3</i>	<i>4.2</i>
Electricity Supply	0	0	0	0	0	na	na
Gas Supply	0	0	1	1	0	-10.2	na
Water Supply Sewerage and Drainage Services	3	0	0	0	0	na	-100.0
Waste Collection Treatment and Disposal Services	13	22	22	20	-2	-8.6	4.5
Publishing (except Internet and Music Publishing)	2	3	4	3	0	-11.4	7.5
Motion Picture and Sound Recording Activities	5	4	5	4	0	-2.3	-0.6
Broadcasting (except Internet)	2	1	2	1	0	-22.1	-6.5
Internet Publishing and Broadcasting	0	0	0	0	0	na	na
Telecommunications Services	3	10	3	0	-3	-100.0	-100.0
Internet Service Providers Web Search Portals and Data Processing Services	19	10	7	7	0	-2.9	-10.1
Library and Other Information Services	1	1	1	1	0	-2.5	0.8
Finance	14	33	35	33	-2	-4.8	8.9
Insurance and Superannuation Funds	0	1	1	1	0	-49.5	3.1
Auxiliary Finance and Insurance Services	3	11	10	10	0	2.6	13.3
Rental and Hiring Services (except Real Estate)	24	49	70	71	1	1.1	11.3
Property Operators and Real Estate Services	20	25	29	37	8	29.1	6.4
Professional Scientific and Technical Services (exc Comp Sys Dsn & related)	40	62	65	74	9	13.0	6.4
Computer System Design and Related Services	1	5	5	7	2	36.5	22.0
Administrative Services	26	34	38	39	1	3.8	4.2
Building Cleaning Pest Control and Other Support Services	4	8	7	9	2	24.5	8.9
<i>Business Services</i>	<i>179</i>	<i>281</i>	<i>304</i>	<i>319</i>	<i>15</i>	<i>4.8</i>	<i>5.9</i>
Heritage Activities	7	10	8	7	-1	-11.5	1.1
Artistic Activities	0	2	1	1	0	-14.7	9.1
Sport and Recreation Activities	39	53	55	49	-6	-11.1	2.3
Gambling Activities	5	2	4	4	0	1.1	-0.3
<i>Arts and Recreation Services</i>	<i>51</i>	<i>67</i>	<i>69</i>	<i>61</i>	<i>-7</i>	<i>-10.4</i>	<i>2.0</i>
Public Administration	4	22	21	22	1	4.1	18.2
Defence	0	0	0	0	0	na	na
Public Order Safety and Regulatory Services	6	11	15	15	0	-0.2	8.9
Preschool and School Education	15	23	24	26	1	5.2	5.7
Tertiary Education	0	3	4	3	-1	-19.6	na
Adult Community and Other Education	3	4	3	3	0	-3.8	-0.3
Hospitals	2	6	5	5	0	4.3	10.5
Medical and Other Health Care Services	9	16	16	17	1	4.7	6.3
Residential Care Services	4	7	7	8	1	17.1	7.5
Social Assistance Services	1	2	2	4	2	75.6	16.6
<i>Social Services</i>	<i>44</i>	<i>93</i>	<i>97</i>	<i>102</i>	<i>5</i>	<i>5.3</i>	<i>8.8</i>
<i>Subtotal</i>	<i>752</i>	<i>1,022</i>	<i>1,084</i>	<i>1,141</i>	<i>58</i>	<i>5.3</i>	<i>4.3</i>
Owner-Occupied Dwellings and Property Operators	112	165	174	180	6	3.4	4.8
TOTAL ALL INDUSTRIES	865	1,187	1,258	1,321	64	5.1	4.3
<i>Tourism sector</i>	<i>177</i>	<i>242</i>	<i>260</i>	<i>270</i>	<i>10</i>	<i>3.9</i>	<i>4.3</i>

Activity units for	2003	2011	2012	2013	change 2012-2013		Change 2003 to 2013 %pa
					Number	%	
Agriculture	270	235	236	221	-15	-6.4	-2.0
Aquaculture	0	1	2	2	0	0.0	na
Forestry and Logging	16	18	21	22	1	4.8	3.2
Fishing Hunting and Trapping	2	9	11	13	2	18.2	20.6
Agriculture Forestry and Fishing Support Services	38	47	49	49	0	0.0	2.6
Coal Mining	0	0	0	0	0	na	na
Oil and Gas Extraction	0	0	0	0	0	na	na
Metal Ore Mining	5	2	2	3	1	50.0	-5.0
Non-Metallic Mineral Mining and Quarrying	3	8	8	9	1	12.5	11.6
Exploration and Other Mining Support Services	0	3	4	4	0	0.0	na
<i>Primary</i>	<i>334</i>	<i>323</i>	<i>333</i>	<i>323</i>	<i>-10</i>	<i>-3.0</i>	<i>-0.3</i>
Food Product Manufacturing	13	17	22	24	2	9.1	6.3
Beverage and Tobacco Product Manufacturing	9	15	16	22	6	37.5	9.3
Textile Leather Clothing and Footwear Manufacturing	14	12	12	13	1	8.3	-0.7
Wood Product Manufacturing	18	14	15	16	1	6.7	-1.2
Pulp Paper and Converted Paper Product Manufacturing	0	0	0	0	0	na	na
Printing	8	12	11	10	-1	-9.1	2.3
Petroleum and Coal Product Manufacturing	0	0	0	0	0	na	na
Basic Chemical and Chemical Product Manufacturing	2	1	2	2	0	0.0	0.0
Polymer Product and Rubber Product Manufacturing	2	5	3	1	-2	-66.7	-6.7
Non-Metallic Mineral Product Manufacturing	9	8	8	9	1	12.5	0.0
Primary Metal and Metal Product Manufacturing	1	4	5	5	0	0.0	17.5
Fabricated Metal Product Manufacturing	7	12	14	14	0	0.0	7.2
Transport Equipment Manufacturing	15	19	19	16	-3	-15.8	0.6
Machinery and Equipment Manufacturing	20	20	20	20	0	0.0	0.0
Furniture and Other Manufacturing	18	20	16	19	3	18.8	0.5
<i>Manufacturing</i>	<i>136</i>	<i>159</i>	<i>163</i>	<i>171</i>	<i>8</i>	<i>4.9</i>	<i>2.3</i>
Building Construction	246	448	435	438	3	0.7	5.9
Heavy and Civil Engineering Construction	15	20	24	22	-2	-8.3	3.9
Construction Services	322	569	557	570	13	2.3	5.9
<i>Construction</i>	<i>583</i>	<i>1,037</i>	<i>1,016</i>	<i>1,030</i>	<i>14</i>	<i>1.4</i>	<i>5.9</i>
Basic Material Wholesaling	14	21	21	21	0	0.0	4.1
Machinery and Equipment Wholesaling	16	19	19	19	0	0.0	1.7
Motor Vehicle and Motor Vehicle Parts Wholesaling	2	5	4	4	0	0.0	7.2
Grocery Liquor and Tobacco Product Wholesaling	25	23	26	26	0	0.0	0.4
Other Goods Wholesaling	21	28	31	34	3	9.7	4.9
Commission-Based Wholesaling	5	2	3	3	0	0.0	-5.0
Road Transport	76	84	98	99	1	1.0	2.7
Rail Transport	1	0	0	0	0	na	-100.0
Water Transport	1	3	2	2	0	0.0	7.2
Air and Space Transport	28	26	25	24	-1	-4.0	-1.5
Other Transport	37	39	42	44	2	4.8	1.7
Postal and Courier Pick-up and Delivery Services	15	27	25	27	2	8.0	6.1
Transport Support Services	6	10	9	10	1	11.1	5.2
Warehousing and Storage Services	3	4	4	4	0	0.0	2.9
<i>Wholesale and Distribution</i>	<i>250</i>	<i>291</i>	<i>309</i>	<i>317</i>	<i>8</i>	<i>2.6</i>	<i>2.4</i>
Motor Vehicle and Motor Vehicle Parts Retailing	8	13	11	13	2	18.2	5.0
Fuel Retailing	11	10	9	8	-1	-11.1	-3.1
Food Retailing	30	52	54	55	1	1.9	6.2
Other Store-Based Retailing	218	317	322	328	6	1.9	4.2
Non-Store Retailing and Retail Commission Based Buying and/or Selling	5	15	16	23	7	43.8	16.5
Accommodation	237	266	264	273	9	3.4	1.4
Food and Beverage Services	174	247	245	244	-1	-0.4	3.4
Repair and Maintenance	60	81	78	80	2	2.6	2.9
Personal and Other Services	67	91	90	91	1	1.1	3.1
Private Households Employing Staff	0	0	0	0	0	na	na
<i>Retail Trade and Services</i>	<i>810</i>	<i>1,092</i>	<i>1,089</i>	<i>1,115</i>	<i>26</i>	<i>2.4</i>	<i>3.2</i>
Electricity Supply	1	2	3	3	0	0.0	11.6
Gas Supply	0	0	1	1	0	0.0	na
Water Supply Sewerage and Drainage Services	5	4	4	3	-1	-25.0	-5.0
Waste Collection Treatment and Disposal Services	9	9	11	12	1	9.1	2.9
Publishing (except Internet and Music Publishing)	9	13	14	15	1	7.1	5.2
Motion Picture and Sound Recording Activities	50	71	64	69	5	7.8	3.3
Broadcasting (except Internet)	6	4	4	5	1	25.0	-1.8
Internet Publishing and Broadcasting	0	3	2	2	0	0.0	na
Telecommunications Services	3	3	3	3	0	0.0	0.0
Internet Service Providers Web Search Portals and Data Processing Services	6	9	10	10	0	0.0	5.2
Library and Other Information Services	5	6	7	6	-1	-14.3	1.8
Finance	69	365	397	406	9	2.3	19.4
Insurance and Superannuation Funds	3	4	4	4	0	0.0	2.9
Auxiliary Finance and Insurance Services	21	50	58	54	-4	-6.9	9.9
Rental and Hiring Services (except Real Estate)	73	116	112	117	5	4.5	4.8
Property Operators and Real Estate Services	750	1,400	1,408	1,448	40	2.8	6.8
Professional Scientific and Technical Services (exc Comp Sys Dsn & related)	270	463	497	524	27	5.4	6.9
Computer System Design and Related Services	13	52	63	62	-1	-1.6	16.9
Administrative Services	117	177	187	193	6	3.2	5.1
Building Cleaning Pest Control and Other Support Services	41	75	75	79	4	5.3	6.8
<i>Business Services</i>	<i>1,451</i>	<i>2,826</i>	<i>2,924</i>	<i>3,016</i>	<i>92</i>	<i>3.1</i>	<i>7.6</i>
Heritage Activities	13	14	14	12	-2	-14.3	-0.8
Artistic Activities	31	38	37	41	4	10.8	2.8
Sport and Recreation Activities	131	164	169	175	6	3.6	2.9
Gambling Activities	4	2	3	3	0	0.0	-2.8
<i>Arts and Recreation Services</i>	<i>179</i>	<i>218</i>	<i>223</i>	<i>231</i>	<i>8</i>	<i>3.6</i>	<i>2.6</i>
Public Administration	8	9	10	9	-1	-10.0	1.2
Defence	0	0	0	0	0	na	na
Public Order Safety and Regulatory Services	20	24	23	26	3	13.0	2.7
Preschool and School Education	21	29	31	32	1	3.2	4.3
Tertiary Education	0	6	10	7	-3	-30.0	na
Adult Community and Other Education	22	41	35	37	2	5.7	5.3
Hospitals	1	1	1	1	0	0.0	0.0
Medical and Other Health Care Services	78	119	128	123	-5	-3.9	4.7
Residential Care Services	2	5	5	5	0	0.0	9.6
Social Assistance Services	8	10	16	18	2	12.5	8.4
<i>Social Services</i>	<i>160</i>	<i>244</i>	<i>259</i>	<i>258</i>	<i>-1</i>	<i>-0.4</i>	<i>4.9</i>
TOTAL ALL INDUSTRIES	3,903	6,190	6,316	6,461	145	2.3	5.2
<i>Tourism sector</i>	<i>480</i>	<i>791</i>	<i>844</i>	<i>874</i>	<i>29</i>	<i>3.5</i>	<i>6.2</i>

Table 8.14 Employment in Key Sectors, Queenstown-Lakes District, 2003 to 2013

Key sectors employment (FTEs)					%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Primary production	619	506	461	489	6.0	-2.3
Primary processing	222	211	304	294	-3.4	2.8
Creative	297	365	379	355	-6.3	1.8
Education and research	324	608	636	649	2.0	7.2
Engineering, machinery and equipment manufacturing	66	113	120	145	20.9	8.2
Key sectors (excluding Tourism)	1,529	1,803	1,901	1,932	1.6	2.4
Non-key sectors	9,499	12,717	13,371	13,763	2.9	3.8
Total employment: Queenstown-Lakes	11,027	14,521	15,272	15,695	2.8	3.6
Tourism sector	3,231	4,487	4,869	5,102	4.8	4.7

Source: BERL Regional Database 2013

Table 8.15 GDP in Key Sectors, Queenstown-Lakes District, 2003 to 2013

Key sectors GDP (2013\$m)					%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Primary production	48	34	40	45	13.1	-0.6
Primary processing	29	29	41	41	-0.6	3.5
Creative	16	14	16	16	-5.9	-0.1
Education and research	18	30	32	33	3.7	6.3
Engineering, machinery and equipment manufacturing	6	10	11	14	21.7	8.2
Key sectors (excluding Tourism)	117	118	141	149	5.4	2.4
Non-key sectors	748	1,069	1,116	1,172	5.0	4.6
Total GDP: Queenstown-Lakes	865	1,187	1,258	1,321	5.1	4.3
Tourism sector	177	242	260	270	3.9	4.3

Source: BERL Regional Database 2013

Table 8.16 Business Units in Key Sectors, Queenstown-Lakes District, 2003 to 2013

Key sectors business units					%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Primary production	334	323	333	323	-3.0	-0.3
Primary processing	40	46	53	62	17.0	4.5
Creative	201	292	298	312	4.7	4.5
Education and research	47	70	72	76	5.6	4.9
Engineering, machinery and equipment manufacturing	50	74	79	85	7.6	5.4
Key sectors (excluding Tourism)	672	805	835	858	2.8	2.5
Non-key sectors	3,231	5,385	5,481	5,603	2.2	5.7
Total business units: Queenstown-Lakes	3,903	6,190	6,316	6,461	2.3	5.2
Tourism sector	480	791	844	874	3.5	6.2

Source: BERL Regional Database 2013

8.10 Detailed tables - Waitaki District

Employment (FTEs) for	2003	2011	2012	2013	change 2012-2013		Change 2003 to 2013 %pa
					Number	%	
Agriculture	1,355	1,505	1,647	1,543	-104	-6.3	1.3
Aquaculture	0	10	10	10	0	-0.4	na
Forestry and Logging	3	6	3	3	0	-0.9	0.4
Fishing Hunting and Trapping	10	7	7	8	0	6.3	-2.4
Agriculture Forestry and Fishing Support Services	169	201	199	220	21	10.8	2.7
Coal Mining	0	0	0	0	0	na	na
Oil and Gas Extraction	0	0	0	0	0	na	na
Metal Ore Mining	248	520	516	536	20	3.9	8.0
Non-Metallic Mineral Mining and Quarrying	57	39	39	39	0	-0.4	-3.7
Exploration and Other Mining Support Services	0	0	0	0	0	na	na
<i>Primary</i>	<i>1,841</i>	<i>2,289</i>	<i>2,421</i>	<i>2,359</i>	<i>-62</i>	<i>-2.6</i>	<i>2.5</i>
Food Product Manufacturing	1,297	1,475	1,781	1,428	-353	-19.8	1.0
Beverage and Tobacco Product Manufacturing	0	3	0	0	0	na	na
Textile Leather Clothing and Footwear Manufacturing	413	292	282	203	-79	-27.9	-6.9
Wood Product Manufacturing	84	76	69	74	5	7.2	-1.3
Pulp Paper and Converted Paper Product Manufacturing	0	0	0	0	0	na	na
Printing	11	12	9	12	3	31.4	0.8
Petroleum and Coal Product Manufacturing	0	0	0	0	0	na	na
Basic Chemical and Chemical Product Manufacturing	8	12	12	9	-3	-25.9	0.4
Polymer Product and Rubber Product Manufacturing	3	0	0	0	0	na	-100.0
Non-Metallic Mineral Product Manufacturing	6	24	19	27	8	44.3	17.0
Primary Metal and Metal Product Manufacturing	67	0	0	0	0	na	-100.0
Fabricated Metal Product Manufacturing	24	57	59	79	19	32.9	12.7
Transport Equipment Manufacturing	26	16	19	19	0	-1.3	-3.4
Machinery and Equipment Manufacturing	51	65	66	58	-8	-12.2	1.2
Furniture and Other Manufacturing	29	18	15	9	-6	-40.8	-11.1
<i>Manufacturing</i>	<i>2,020</i>	<i>2,049</i>	<i>2,330</i>	<i>1,916</i>	<i>-414</i>	<i>-17.8</i>	<i>-0.5</i>
Building Construction	129	180	134	145	12	8.8	1.2
Heavy and Civil Engineering Construction	216	288	256	228	-28	-10.9	0.5
Construction Services	233	408	370	376	6	1.7	4.9
<i>Construction</i>	<i>578</i>	<i>876</i>	<i>760</i>	<i>750</i>	<i>-10</i>	<i>-1.3</i>	<i>2.6</i>
Basic Material Wholesaling	70	115	136	142	6	4.4	7.3
Machinery and Equipment Wholesaling	20	52	62	98	36	58.9	17.0
Motor Vehicle and Motor Vehicle Parts Wholesaling	3	3	3	3	0	12.1	0.8
Grocery Liquor and Tobacco Product Wholesaling	24	66	56	58	3	5.0	9.5
Other Goods Wholesaling	25	53	39	50	11	28.6	7.1
Commission-Based Wholesaling	31	10	10	10	0	-0.4	-10.6
Road Transport	204	167	160	156	-4	-2.8	-2.7
Rail Transport	6	3	3	0	-3	-100.0	-100.0
Water Transport	0	0	0	0	0	na	na
Air and Space Transport	3	0	0	0	0	na	-100.0
Other Transport	12	2	2	4	2	99.9	-9.0
Postal and Courier Pick-up and Delivery Services	40	49	44	31	-13	-29.8	-2.6
Transport Support Services	3	0	0	0	0	na	-100.0
Warehousing and Storage Services	0	0	0	0	0	na	na
<i>Wholesale and Distribution</i>	<i>441</i>	<i>520</i>	<i>515</i>	<i>553</i>	<i>38</i>	<i>7.3</i>	<i>2.3</i>
Motor Vehicle and Motor Vehicle Parts Retailing	86	84	89	90	1	0.9	0.5
Fuel Retailing	86	79	63	54	-8	-13.0	-4.5
Food Retailing	401	352	331	335	4	1.1	-1.8
Other Store-Based Retailing	413	360	346	354	7	2.1	-1.5
Non-Store Retailing and Retail Commission Based Buying and/or Selling	17	9	10	12	2	22.5	-3.4
Accommodation	163	208	194	179	-15	-7.7	1.0
Food and Beverage Services	342	351	357	382	25	6.9	1.1
Repair and Maintenance	82	128	122	114	-8	-6.7	3.4
Personal and Other Services	77	58	66	72	7	10.6	-0.6
Private Households Employing Staff	0	0	0	0	0	na	na
<i>Retail Trade and Services</i>	<i>1,666</i>	<i>1,628</i>	<i>1,578</i>	<i>1,593</i>	<i>14</i>	<i>0.9</i>	<i>-0.5</i>
Electricity Supply	0	54	77	82	5	7.0	na
Gas Supply	0	0	0	0	0	na	na
Water Supply Sewerage and Drainage Services	0	0	0	0	0	na	na
Waste Collection Treatment and Disposal Services	8	9	9	7	-2	-22.8	-1.6
Publishing (except Internet and Music Publishing)	50	94	90	92	2	2.7	6.4
Motion Picture and Sound Recording Activities	5	8	9	3	-6	-67.3	-5.1
Broadcasting (except Internet)	12	13	13	10	-3	-25.3	-2.1
Internet Publishing and Broadcasting	0	0	0	0	0	na	na
Telecommunications Services	0	0	0	0	0	na	na
Internet Service Providers Web Search Portals and Data Processing Services	0	0	0	0	0	na	na
Library and Other Information Services	15	15	14	14	0	-2.6	-0.9
Finance	62	58	55	56	1	1.6	-1.0
Insurance and Superannuation Funds	6	9	12	0	-12	-100.0	-100.0
Auxiliary Finance and Insurance Services	11	12	12	18	6	51.5	5.4
Rental and Hiring Services (except Real Estate)	35	40	65	28	-36	-56.2	-2.2
Property Operators and Real Estate Services	45	53	50	79	29	58.7	5.9
Professional Scientific and Technical Services (exc Comp Sys Dsn & related)	159	304	266	271	5	1.8	5.5
Computer System Design and Related Services	3	0	0	0	0	na	-100.0
Administrative Services	82	90	84	120	36	43.2	3.8
Building Cleaning Pest Control and Other Support Services	25	21	21	19	-2	-8.7	-2.7
<i>Business Services</i>	<i>518</i>	<i>781</i>	<i>776</i>	<i>799</i>	<i>23</i>	<i>2.9</i>	<i>4.4</i>
Heritage Activities	7	17	14	10	-3	-23.7	3.3
Artistic Activities	0	2	2	5	2	96.1	na
Sport and Recreation Activities	65	89	97	81	-15	-15.7	2.2
Gambling Activities	0	0	0	0	0	na	na
<i>Arts and Recreation Services</i>	<i>73</i>	<i>108</i>	<i>113</i>	<i>97</i>	<i>-16</i>	<i>-14.2</i>	<i>2.9</i>
Public Administration	65	99	97	107	10	10.6	5.2
Defence	0	7	0	0	0	na	na
Public Order Safety and Regulatory Services	102	121	112	101	-12	-10.4	-0.1
Preschool and School Education	481	494	489	502	14	2.8	0.4
Tertiary Education	5	11	14	11	-3	-20.6	7.9
Adult Community and Other Education	16	34	15	15	1	4.3	-0.6
Hospitals	109	153	152	155	3	2.1	3.6
Medical and Other Health Care Services	177	209	183	168	-16	-8.6	-0.6
Residential Care Services	216	249	281	275	-6	-2.1	2.5
Social Assistance Services	56	214	214	207	-8	-3.5	13.9
<i>Social Services</i>	<i>1,228</i>	<i>1,589</i>	<i>1,558</i>	<i>1,542</i>	<i>-16</i>	<i>-1.0</i>	<i>2.3</i>
TOTAL ALL INDUSTRIES	8,365	9,841	10,052	9,608	-443	-4.4	1.4
<i>Tourism sector</i>	<i>483</i>	<i>710</i>	<i>695</i>	<i>731</i>	<i>36</i>	<i>5.1</i>	<i>4.2</i>

Real value added (GDP 2013\$m) for	2003	2011	2012	2013	change 2012-2013		Change 2003 to 2013 %pa
					Number	%	
Agriculture	94	105	151	154	3	1.8	5.0
Aquaculture	0	1	1	1	0	-11.3	na
Forestry and Logging	1	3	1	2	0	6.2	4.8
Fishing Hunting and Trapping	1	0	0	0	0	-5.3	-5.1
Agriculture Forestry and Fishing Support Services	12	11	12	12	0	-1.3	-0.2
Coal Mining	0	0	0	0	0	na	na
Oil and Gas Extraction	0	0	0	0	0	na	na
Metal Ore Mining	54	45	35	38	4	10.6	-3.3
Non-Metallic Mineral Mining and Quarrying	12	3	3	3	0	6.0	-13.7
Exploration and Other Mining Support Services	0	0	0	0	0	na	na
<i>Primary</i>	<i>174</i>	<i>168</i>	<i>203</i>	<i>210</i>	<i>6</i>	<i>3.2</i>	<i>1.9</i>
Food Product Manufacturing	169	194	236	195	-41	-17.4	1.5
Beverage and Tobacco Product Manufacturing	0	0	0	0	0	na	na
Textile Leather Clothing and Footwear Manufacturing	27	26	24	21	-4	-15.7	-2.7
Wood Product Manufacturing	12	13	12	13	1	4.6	0.8
Pulp Paper and Converted Paper Product Manufacturing	0	0	0	0	0	na	na
Printing	0	0	0	1	0	24.1	3.0
Petroleum and Coal Product Manufacturing	0	0	0	0	0	na	na
Basic Chemical and Chemical Product Manufacturing	2	3	3	3	0	-6.3	3.0
Polymer Product and Rubber Product Manufacturing	1	0	0	0	0	na	-100.0
Non-Metallic Mineral Product Manufacturing	1	4	3	5	2	55.6	16.9
Primary Metal and Metal Product Manufacturing	9	0	0	0	0	na	-100.0
Fabricated Metal Product Manufacturing	3	6	6	9	2	33.6	10.3
Transport Equipment Manufacturing	2	2	2	2	0	0.9	-1.8
Machinery and Equipment Manufacturing	4	6	7	6	-1	-10.3	2.8
Furniture and Other Manufacturing	2	1	1	1	0	-40.5	-11.1
<i>Manufacturing</i>	<i>233</i>	<i>256</i>	<i>295</i>	<i>253</i>	<i>-42</i>	<i>-14.2</i>	<i>0.8</i>
Building Construction	9	12	8	10	2	22.6	0.9
Heavy and Civil Engineering Construction	15	19	15	15	0	0.5	0.3
Construction Services	16	26	22	25	3	14.7	4.6
<i>Construction</i>	<i>40</i>	<i>56</i>	<i>45</i>	<i>50</i>	<i>5</i>	<i>11.3</i>	<i>2.4</i>
Basic Material Wholesaling	8	13	16	17	1	5.7	8.0
Machinery and Equipment Wholesaling	2	6	7	12	4	60.9	17.7
Motor Vehicle and Motor Vehicle Parts Wholesaling	0	0	0	0	0	13.5	1.4
Grocery Liquor and Tobacco Product Wholesaling	3	8	7	7	0	6.3	10.2
Other Goods Wholesaling	3	6	5	6	1	30.2	7.7
Commission-Based Wholesaling	3	1	1	1	0	0.8	-10.1
Road Transport	26	24	23	23	0	-1.2	-1.4
Rail Transport	1	0	0	0	0	-100.0	-100.0
Water Transport	0	0	0	0	0	na	na
Air and Space Transport	0	0	0	0	0	na	-100.0
Other Transport	1	0	0	1	0	103.2	-7.8
Postal and Courier Pick-up and Delivery Services	5	7	6	5	-2	-28.7	-1.3
Transport Support Services	0	0	0	0	0	na	-100.0
Warehousing and Storage Services	0	0	0	0	0	na	na
<i>Wholesale and Distribution</i>	<i>54</i>	<i>67</i>	<i>66</i>	<i>71</i>	<i>5</i>	<i>7.5</i>	<i>2.8</i>
Motor Vehicle and Motor Vehicle Parts Retailing	4	6	6	7	0	3.7	5.4
Fuel Retailing	4	5	4	4	0	-10.6	0.2
Food Retailing	18	24	24	25	1	3.9	3.0
Other Store-Based Retailing	19	24	25	26	1	4.9	3.3
Non-Store Retailing and Retail Commission Based Buying and/or Selling	1	1	1	1	0	25.9	1.3
Accommodation	5	7	6	6	-1	-9.0	0.6
Food and Beverage Services	11	11	12	12	1	5.4	0.7
Repair and Maintenance	4	6	6	6	0	-6.5	2.8
Personal and Other Services	4	3	3	4	0	10.8	-1.1
Private Households Employing Staff	0	0	0	0	0	na	na
<i>Retail Trade and Services</i>	<i>71</i>	<i>86</i>	<i>87</i>	<i>89</i>	<i>2</i>	<i>2.4</i>	<i>2.3</i>
Electricity Supply	0	20	27	26	-1	-3.5	na
Gas Supply	0	0	0	0	0	na	na
Water Supply Sewerage and Drainage Services	0	0	0	0	0	na	na
Waste Collection Treatment and Disposal Services	4	3	3	2	-1	-30.3	-4.8
Publishing (except Internet and Music Publishing)	2	4	4	4	0	-3.0	8.7
Motion Picture and Sound Recording Activities	0	1	1	0	0	-65.9	-6.4
Broadcasting (except Internet)	1	1	1	1	0	-22.1	-3.3
Internet Publishing and Broadcasting	0	0	0	0	0	na	na
Telecommunications Services	0	0	0	0	0	na	na
Internet Service Providers Web Search Portals and Data Processing Services	0	0	0	0	0	na	na
Library and Other Information Services	1	1	1	1	0	-2.5	-1.4
Finance	8	9	9	9	0	3.2	1.0
Insurance and Superannuation Funds	1	1	2	0	-2	-100.0	-100.0
Auxiliary Finance and Insurance Services	1	2	2	3	1	54.0	7.5
Rental and Hiring Services (except Real Estate)	9	10	17	7	-9	-55.8	-1.6
Property Operators and Real Estate Services	5	6	5	9	3	59.9	6.4
Professional Scientific and Technical Services (exc Comp Sys Dsn & related)	17	28	25	25	0	1.4	3.9
Computer System Design and Related Services	0	0	0	0	0	na	-100.0
Administrative Services	4	4	4	6	2	47.2	2.2
Building Cleaning Pest Control and Other Support Services	1	1	1	1	0	-6.2	-4.1
<i>Business Services</i>	<i>55</i>	<i>91</i>	<i>101</i>	<i>94</i>	<i>-7</i>	<i>-7.1</i>	<i>5.6</i>
Heritage Activities	1	1	1	1	0	-20.4	2.0
Artistic Activities	0	0	0	0	0	104.6	na
Sport and Recreation Activities	5	6	7	6	-1	-12.0	0.9
Gambling Activities	0	0	0	0	0	na	na
<i>Arts and Recreation Services</i>	<i>6</i>	<i>8</i>	<i>8</i>	<i>7</i>	<i>-1</i>	<i>-10.5</i>	<i>1.5</i>
Public Administration	5	9	9	10	1	10.3	6.4
Defence	0	0	0	0	0	na	na
Public Order Safety and Regulatory Services	7	9	8	7	-1	-10.4	1.0
Preschool and School Education	26	24	24	25	1	3.3	-0.5
Tertiary Education	0	1	1	1	0	-20.2	6.9
Adult Community and Other Education	1	2	1	1	0	4.8	-1.6
Hospitals	9	12	12	12	1	4.3	3.6
Medical and Other Health Care Services	14	17	14	13	-1	-6.7	-0.5
Residential Care Services	17	20	22	22	0	0.0	2.5
Social Assistance Services	3	10	10	10	0	-3.4	13.3
<i>Social Services</i>	<i>81</i>	<i>104</i>	<i>100</i>	<i>100</i>	<i>0</i>	<i>0.0</i>	<i>2.1</i>
<i>Subtotal</i>	<i>713</i>	<i>837</i>	<i>906</i>	<i>874</i>	<i>-31</i>	<i>-3.5</i>	<i>2.1</i>
Owner-Occupied Dwellings and Property Operators	116	129	132	133	1	0.5	1.3
TOTAL ALL INDUSTRIES	829	966	1,038	1,007	-31	-3.0	2.0
<i>Tourism sector</i>	<i>32</i>	<i>42</i>	<i>42</i>	<i>45</i>	<i>3</i>	<i>7.1</i>	<i>3.6</i>

Activity units for	2003	2011	2012	2013	change 2012-2013		Change 2003 to 2013 %
					Number	%	
Agriculture	905	865	896	887	-9	-1.0	-0.2
Aquaculture	1	2	2	2	0	0.0	7.2
Forestry and Logging	68	53	54	53	-1	-1.9	-2.5
Fishing Hunting and Trapping	29	11	10	9	-1	-10.0	-11.0
Agriculture Forestry and Fishing Support Services	66	71	71	82	11	15.5	2.2
Coal Mining	0	0	0	0	0	na	na
Oil and Gas Extraction	0	0	0	0	0	na	na
Metal Ore Mining	1	1	1	1	0	0.0	0.0
Non-Metallic Mineral Mining and Quarrying	6	4	5	5	0	0.0	-1.8
Exploration and Other Mining Support Services	1	0	0	0	0	na	-100.0
<i>Primary</i>	<i>1,077</i>	<i>1,007</i>	<i>1,039</i>	<i>1,039</i>	<i>0</i>	<i>0.0</i>	<i>-0.4</i>
Food Product Manufacturing	16	15	15	14	-1	-6.7	-1.3
Beverage and Tobacco Product Manufacturing	1	4	2	3	1	50.0	11.6
Textile Leather Clothing and Footwear Manufacturing	7	6	5	6	1	20.0	-1.5
Wood Product Manufacturing	13	17	15	15	0	0.0	1.4
Pulp Paper and Converted Paper Product Manufacturing	1	0	0	0	0	na	-100.0
Printing	2	3	3	3	0	0.0	4.1
Petroleum and Coal Product Manufacturing	0	0	0	0	0	na	na
Basic Chemical and Chemical Product Manufacturing	1	4	4	4	0	0.0	14.9
Polymer Product and Rubber Product Manufacturing	1	0	0	1	1	na	0.0
Non-Metallic Mineral Product Manufacturing	10	11	11	11	0	0.0	1.0
Primary Metal and Metal Product Manufacturing	1	1	1	1	0	0.0	0.0
Fabricated Metal Product Manufacturing	7	11	11	10	-1	-9.1	3.6
Transport Equipment Manufacturing	2	4	5	3	-2	-40.0	4.1
Machinery and Equipment Manufacturing	8	15	15	15	0	0.0	6.5
Furniture and Other Manufacturing	4	7	6	5	-1	-16.7	2.3
<i>Manufacturing</i>	<i>74</i>	<i>98</i>	<i>93</i>	<i>91</i>	<i>-2</i>	<i>-2.2</i>	<i>2.1</i>
Building Construction	42	72	62	62	0	0.0	4.0
Heavy and Civil Engineering Construction	15	14	16	14	-2	-12.5	-0.7
Construction Services	105	153	157	158	1	0.6	4.2
<i>Construction</i>	<i>162</i>	<i>239</i>	<i>235</i>	<i>234</i>	<i>-1</i>	<i>-0.4</i>	<i>3.7</i>
Basic Material Wholesaling	19	28	29	28	-1	-3.4	4.0
Machinery and Equipment Wholesaling	7	11	13	14	1	7.7	7.2
Motor Vehicle and Motor Vehicle Parts Wholesaling	2	1	1	1	0	0.0	-6.7
Grocery Liquor and Tobacco Product Wholesaling	8	7	8	7	-1	-12.5	-1.3
Other Goods Wholesaling	11	12	11	9	-2	-18.2	-2.0
Commission-Based Wholesaling	14	5	6	5	-1	-16.7	-9.8
Road Transport	48	42	39	42	3	7.7	-1.3
Rail Transport	2	1	1	1	0	0.0	-6.7
Water Transport	0	0	0	0	0	na	na
Air and Space Transport	2	1	1	1	0	0.0	-6.7
Other Transport	6	5	6	6	0	0.0	0.0
Postal and Courier Pick-up and Delivery Services	14	16	16	18	2	12.5	2.5
Transport Support Services	4	2	2	3	1	50.0	-2.8
Warehousing and Storage Services	2	2	2	2	0	0.0	0.0
<i>Wholesale and Distribution</i>	<i>139</i>	<i>133</i>	<i>135</i>	<i>137</i>	<i>2</i>	<i>1.5</i>	<i>-0.1</i>
Motor Vehicle and Motor Vehicle Parts Retailing	15	17	16	17	1	6.3	1.3
Fuel Retailing	16	14	14	13	-1	-7.1	-2.1
Food Retailing	39	38	37	35	-2	-5.4	-1.1
Other Store-Based Retailing	90	96	93	94	1	1.1	0.4
Non-Store Retailing and Retail Commission Based Buying and/or Selling	9	6	6	9	3	50.0	0.0
Accommodation	49	67	65	61	-4	-6.2	2.2
Food and Beverage Services	64	71	70	70	0	0.0	0.9
Repair and Maintenance	45	43	40	43	3	7.5	-0.5
Personal and Other Services	58	55	57	57	0	0.0	-0.2
Private Households Employing Staff	0	0	0	0	0	na	na
<i>Retail Trade and Services</i>	<i>385</i>	<i>407</i>	<i>398</i>	<i>399</i>	<i>1</i>	<i>0.3</i>	<i>0.4</i>
Electricity Supply	3	5	5	5	0	0.0	5.2
Gas Supply	0	0	0	0	0	na	na
Water Supply Sewerage and Drainage Services	1	3	3	2	-1	-33.3	7.2
Waste Collection Treatment and Disposal Services	5	5	5	7	2	40.0	3.4
Publishing (except Internet and Music Publishing)	3	6	7	6	-1	-14.3	7.2
Motion Picture and Sound Recording Activities	1	2	2	1	-1	-50.0	0.0
Broadcasting (except Internet)	3	3	3	3	0	0.0	0.0
Internet Publishing and Broadcasting	0	0	0	0	0	na	na
Telecommunications Services	1	0	0	0	0	na	-100.0
Internet Service Providers Web Search Portals and Data Processing Services	1	0	0	0	0	na	-100.0
Library and Other Information Services	2	2	2	2	0	0.0	0.0
Finance	19	70	64	67	3	4.7	13.4
Insurance and Superannuation Funds	2	2	2	2	0	0.0	0.0
Auxiliary Finance and Insurance Services	11	13	15	11	-4	-26.7	0.0
Rental and Hiring Services (except Real Estate)	23	18	24	27	3	12.5	1.6
Property Operators and Real Estate Services	360	480	489	519	30	6.1	3.7
Professional Scientific and Technical Services (exc Comp Sys Dsn & related)	49	81	82	79	-3	-3.7	4.9
Computer System Design and Related Services	8	6	5	7	2	40.0	-1.3
Administrative Services	15	19	17	19	2	11.8	2.4
Building Cleaning Pest Control and Other Support Services	8	24	21	19	-2	-9.5	9.0
<i>Business Services</i>	<i>515</i>	<i>739</i>	<i>746</i>	<i>776</i>	<i>30</i>	<i>4.0</i>	<i>4.2</i>
Heritage Activities	7	6	6	5	-1	-16.7	-3.3
Artistic Activities	3	9	7	7	0	0.0	8.8
Sport and Recreation Activities	34	45	46	44	-2	-4.3	2.6
Gambling Activities	0	0	0	0	0	na	na
<i>Arts and Recreation Services</i>	<i>44</i>	<i>60</i>	<i>59</i>	<i>56</i>	<i>-3</i>	<i>-5.1</i>	<i>2.4</i>
Public Administration	6	6	6	6	0	0.0	0.0
Defence	1	1	0	0	0	na	-100.0
Public Order Safety and Regulatory Services	20	20	20	20	0	0.0	0.0
Preschool and School Education	39	35	36	36	0	0.0	-0.8
Tertiary Education	1	1	1	1	0	0.0	0.0
Adult Community and Other Education	8	9	9	7	-2	-22.2	-1.3
Hospitals	1	1	1	1	0	0.0	0.0
Medical and Other Health Care Services	52	47	51	52	1	2.0	0.0
Residential Care Services	13	13	13	13	0	0.0	0.0
Social Assistance Services	8	17	16	16	0	0.0	7.2
<i>Social Services</i>	<i>149</i>	<i>150</i>	<i>153</i>	<i>152</i>	<i>-1</i>	<i>-0.7</i>	<i>0.2</i>
TOTAL ALL INDUSTRIES	2,545	2,833	2,858	2,884	26	0.9	1.3
<i>Tourism sector</i>	<i>114</i>	<i>184</i>	<i>188</i>	<i>196</i>	<i>9</i>	<i>4.7</i>	<i>5.6</i>

Table 8.17 Employment in Key Sectors, Waitaki District, 2003 to 2013

Key sectors employment (FTEs)	2003	2011	2012	2013	%pa change	
					2012 to 2013	2003 to 2013
Primary production	1,841	2,289	2,421	2,359	-2.6	2.5
Primary processing	1,381	1,554	1,850	1,502	-18.8	0.8
Creative	101	153	141	139	-1.2	3.2
Education and research	534	607	541	548	1.2	0.3
Engineering, machinery and equipment manufacturing	30	65	66	58	-12.2	6.7
Key sectors (excluding Tourism)	3,888	4,667	5,020	4,606	-8.2	1.7
Non-key sectors	4,477	5,174	5,032	5,002	-0.6	1.1
Total employment: Waitaki	8,365	9,841	10,052	9,608	-4.4	1.4
Tourism sector	483	710	695	731	5.1	4.2

Source: BERL Regional Database 2013

Table 8.18 GDP in Key Sectors, Waitaki District, 2003 to 2013

Key sectors GDP (2013\$m)	2003	2011	2012	2013	%pa change	
					2012 to 2013	2003 to 2013
Primary production	174	168	203	210	3.2	1.9
Primary processing	180	207	248	207	-16.4	1.4
Creative	3	4	4	3	-15.2	0.1
Education and research	31	32	28	28	0.8	-0.9
Engineering, machinery and equipment manufacturing	3	6	6	5	-12.9	7.4
Key sectors (excluding Tourism)	391	418	489	454	-7.2	1.5
Non-key sectors	438	548	549	553	0.8	2.4
Total GDP: Waitaki	829	966	1,038	1,007	-3.0	2.0
Tourism sector	32	42	42	45	7.1	3.6

Source: BERL Regional Database 2013

Table 8.19 Business Units in Key Sectors, Waitaki District, 2003 to 2013

Key sectors business units	2003	2011	2012	2013	%pa change	
					2012 to 2013	2003 to 2013
Primary production	1,077	1,007	1,039	1,039	0.0	-0.4
Primary processing	30	36	32	32	0.0	0.6
Creative	27	40	39	40	2.6	4.0
Education and research	54	52	53	48	-9.4	-1.2
Engineering, machinery and equipment manufacturing	11	22	24	25	4.2	8.6
Key sectors (excluding Tourism)	1,199	1,157	1,187	1,184	-0.3	-0.1
Non-key sectors	1,346	1,676	1,671	1,700	1.7	2.4
Total business units: Waitaki	2,545	2,833	2,858	2,884	0.9	1.3
Tourism sector	114	184	188	196	4.7	5.6

Source: BERL Regional Database 2013

8.11 Detailed tables - New Zealand

Employment (FTEs) for	2003	2011	2012	2013	change 2012-2013		Change 2003 to 2013 %pa
					Number	%	
Agriculture	109,308	107,342	106,017	105,025	-992	-0.9	-0.4
Aquaculture	767	762	742	921	179	24.1	1.8
Forestry and Logging	5,851	4,590	4,754	4,675	-80	-1.7	-2.2
Fishing Hunting and Trapping	1,656	1,561	1,398	1,569	170	12.2	-0.5
Agriculture Forestry and Fishing Support Services	18,963	24,133	21,867	23,134	1,268	5.8	2.0
Coal Mining	889	1,371	2,171	1,781	-390	-18.0	7.2
Oil and Gas Extraction	573	568	679	822	142	20.9	3.7
Metal Ore Mining	504	1,095	1,383	1,426	42	3.1	11.0
Non-Metallic Mineral Mining and Quarrying	1,893	2,021	2,063	2,147	84	4.1	1.3
Exploration and Other Mining Support Services	441	1,788	1,266	1,393	128	10.1	12.2
Primary	140,845	145,232	142,340	142,892	552	0.4	0.1
Food Product Manufacturing	70,273	69,417	72,057	72,352	295	0.4	0.3
Beverage and Tobacco Product Manufacturing	5,803	6,341	6,428	6,850	421	6.6	1.7
Textile Leather Clothing and Footwear Manufacturing	19,126	11,430	10,830	10,260	-570	-5.3	-6.0
Wood Product Manufacturing	20,653	16,736	16,510	16,350	-159	-1.0	-2.3
Pulp Paper and Converted Paper Product Manufacturing	6,102	4,822	4,442	4,185	-257	-5.8	-3.7
Printing	10,680	9,297	9,267	8,573	-694	-7.5	-2.2
Petroleum and Coal Product Manufacturing	1,097	1,446	1,416	1,377	-39	-2.8	2.3
Basic Chemical and Chemical Product Manufacturing	7,963	6,296	6,630	6,692	62	0.9	-1.7
Polymer Product and Rubber Product Manufacturing	12,363	9,910	10,505	10,386	-118	-1.1	-1.7
Non-Metallic Mineral Product Manufacturing	6,253	6,839	6,926	6,951	25	0.4	1.1
Primary Metal and Metal Product Manufacturing	6,008	5,102	5,216	4,987	-228	-4.4	-1.8
Fabricated Metal Product Manufacturing	22,426	22,851	22,410	22,206	-204	-0.9	-0.1
Transport Equipment Manufacturing	13,567	12,570	12,492	11,653	-838	-6.7	-1.5
Machinery and Equipment Manufacturing	27,293	26,303	28,448	27,727	-721	-2.5	0.2
Furniture and Other Manufacturing	11,796	8,804	8,116	7,587	-529	-6.5	-4.3
Manufacturing	241,403	218,164	221,692	218,137	-3,555	-1.6	-1.0
Building Construction	25,793	33,797	32,821	35,653	2,833	8.6	3.3
Heavy and Civil Engineering Construction	25,940	39,675	40,892	37,972	-2,920	-7.1	3.9
Construction Services	66,394	88,611	87,560	84,950	-2,610	-3.0	2.5
Construction	118,128	162,083	161,272	158,575	-2,697	-1.7	3.0
Basic Material Wholesaling	16,946	20,327	20,106	19,901	-205	-1.0	1.6
Machinery and Equipment Wholesaling	26,141	30,043	31,818	32,413	595	1.9	2.2
Motor Vehicle and Motor Vehicle Parts Wholesaling	7,229	6,948	7,126	8,048	922	12.9	1.1
Grocery Liquor and Tobacco Product Wholesaling	16,272	22,216	22,752	22,251	-501	-2.2	3.2
Other Goods Wholesaling	23,500	22,486	22,478	22,176	-302	-1.3	-0.6
Commission-Based Wholesaling	2,580	2,735	2,872	2,916	44	1.5	1.2
Road Transport	29,559	33,747	33,832	34,481	650	1.9	1.6
Rail Transport	1,675	2,502	2,393	2,348	-45	-1.9	3.4
Water Transport	2,060	1,653	1,678	1,483	-194	-11.6	-3.2
Air and Space Transport	8,131	10,272	10,546	9,978	-568	-5.4	2.1
Other Transport	1,968	1,721	1,848	1,896	48	2.6	-0.4
Postal and Courier Pick-up and Delivery Services	16,248	10,636	11,152	10,349	-803	-7.2	-4.4
Transport Support Services	12,152	14,357	15,187	15,310	122	0.8	2.3
Warehousing and Storage Services	4,537	5,195	5,710	5,595	-115	-2.0	2.1
Wholesale and Distribution	168,998	184,838	189,498	189,145	-352	-0.2	1.1
Motor Vehicle and Motor Vehicle Parts Retailing	20,081	14,942	14,576	15,217	641	4.4	-2.7
Fuel Retailing	12,338	7,802	7,549	7,641	92	1.2	-4.7
Food Retailing	57,207	51,662	50,357	51,400	1,043	2.1	-1.1
Other Store-Based Retailing	101,454	90,176	88,308	87,927	-381	-0.4	-1.4
Non-Store Retailing and Retail Commission Based Buying and/or Selling	1,566	1,604	2,044	2,157	113	5.5	3.3
Accommodation	24,031	25,348	26,136	24,188	-1,948	-7.5	0.1
Food and Beverage Services	61,885	76,977	80,537	84,599	4,062	5.0	3.2
Repair and Maintenance	22,824	25,230	25,507	25,622	115	0.5	1.2
Personal and Other Services	28,043	34,603	34,020	34,087	66	0.2	2.0
Private Households Employing Staff	0	0	0	0	0	na	na
Retail Trade and Services	329,428	328,344	329,033	332,837	3,805	1.2	0.1
Electricity Supply	4,248	6,874	6,996	7,367	371	5.3	5.7
Gas Supply	414	518	553	563	10	1.8	3.1
Water Supply Sewerage and Drainage Services	1,420	1,661	1,793	1,782	-11	-0.6	2.3
Waste Collection Treatment and Disposal Services	3,068	4,638	4,798	5,638	840	17.5	6.3
Publishing (except Internet and Music Publishing)	15,693	10,282	7,119	6,980	-140	-2.0	-7.8
Motion Picture and Sound Recording Activities	3,217	3,383	3,532	3,269	-262	-7.4	0.2
Broadcasting (except Internet)	5,039	5,850	6,054	6,122	68	1.1	2.0
Internet Publishing and Broadcasting	22	92	99	156	58	58.4	21.8
Telecommunications Services	6,934	10,623	11,572	10,476	-1,096	-9.5	4.2
Internet Service Providers Web Search Portals and Data Processing Services	4,033	2,520	2,603	2,295	-309	-11.9	-5.5
Library and Other Information Services	3,373	3,377	3,301	2,688	-613	-18.6	-2.2
Finance	26,876	31,518	32,331	31,749	-582	-1.8	1.7
Insurance and Superannuation Funds	7,560	9,934	10,808	10,813	5	0.0	3.6
Auxiliary Finance and Insurance Services	9,495	12,881	13,211	13,469	257	1.9	3.6
Rental and Hiring Services (except Real Estate)	9,257	11,099	11,245	11,453	208	1.9	2.2
Property Operators and Real Estate Services	12,367	13,244	13,845	15,102	1,257	9.1	2.0
Professional Scientific and Technical Services (exc Comp Sys Dsn & related)	79,470	117,212	118,393	122,187	3,794	3.2	4.4
Computer System Design and Related Services	14,497	21,564	24,023	25,690	1,667	6.9	5.9
Administrative Services	40,248	58,995	62,967	62,594	-373	-0.6	4.5
Building Cleaning Pest Control and Other Support Services	21,813	22,123	22,757	22,281	-476	-2.1	0.2
Business Services	269,044	348,389	357,999	362,672	4,673	1.3	3.0
Heritage Activities	3,702	6,330	6,798	6,503	-295	-5.1	4.0
Artistic Activities	1,603	1,936	2,388	2,169	-219	-9.2	3.1
Sport and Recreation Activities	16,464	20,727	20,404	18,582	-1,822	-8.9	1.2
Gambling Activities	3,192	3,013	3,033	3,336	303	10.0	0.4
Arts and Recreation Services	24,961	31,995	31,623	29,591	-2,032	-6.4	1.7
Public Administration	41,193	56,524	58,104	61,037	2,933	5.0	4.0
Defence	12,328	15,090	14,311	13,915	-397	-2.8	1.2
Public Order Safety and Regulatory Services	29,081	41,316	42,257	41,950	-307	-0.7	3.7
Preschool and School Education	76,399	100,096	99,529	98,519	-1,010	-1.0	2.6
Tertiary Education	33,776	37,385	38,133	38,070	-63	-0.2	1.2
Adult Community and Other Education	11,730	12,028	10,771	10,855	84	0.8	-0.8
Hospitals	47,028	63,578	63,765	66,478	2,713	4.3	3.5
Medical and Other Health Care Services	37,985	52,158	52,433	52,037	-396	-0.8	3.2
Residential Care Services	26,668	38,271	39,919	40,506	588	1.5	4.3
Social Assistance Services	16,495	25,276	25,905	25,833	-71	-0.3	4.6
Social Services	332,684	441,721	445,126	449,200	4,074	0.9	3.0
TOTAL ALL INDUSTRIES	1,625,492	1,860,767	1,878,583	1,883,050	4,467	0.2	1.5
Tourism sector	90873	97,143	99,758	100,251	494	0.5	1.0

Real value added (GDP 2013\$m) for	2003	2011	2012	2013	change 2012-2013		Change 2003 to 2013 %pa
					Number	%	
Agriculture	7,620	7,486	9,726	10,472	746	7.7	3.2
Aquaculture	55	42	45	50	5	10.6	-1.0
Forestry and Logging	2,000	2,245	2,320	2,444	123	5.3	2.0
Fishing Hunting and Trapping	119	85	85	85	0	0.0	-3.3
Agriculture Forestry and Fishing Support Services	1,363	1,316	1,330	1,254	-76	-5.7	-0.8
Coal Mining	192	119	146	128	-19	-12.6	-4.0
Oil and Gas Extraction	1,078	1,628	1,392	1,453	61	4.4	3.0
Metal Ore Mining	109	95	93	102	9	9.7	-0.6
Non-Metallic Mineral Mining and Quarrying	410	175	139	154	15	10.8	-9.3
Exploration and Other Mining Support Services	95	155	85	100	15	17.2	0.5
<i>Primary</i>	<i>13,042</i>	<i>13,343</i>	<i>15,363</i>	<i>16,242</i>	<i>879</i>	<i>5.7</i>	<i>2.2</i>
Food Product Manufacturing	9,134	9,119	9,549	9,874	324	3.4	0.8
Beverage and Tobacco Product Manufacturing	754	833	852	935	83	9.7	2.2
Textile Leather Clothing and Footwear Manufacturing	1,259	1,028	939	1,040	101	10.8	-1.9
Wood Product Manufacturing	2,833	2,824	2,870	2,774	-96	-3.3	-0.2
Pulp Paper and Converted Paper Product Manufacturing	837	814	772	710	-62	-8.1	-1.6
Printing	400	386	455	398	-57	-12.6	-0.1
Petroleum and Coal Product Manufacturing	271	382	356	438	81	22.9	4.9
Basic Chemical and Chemical Product Manufacturing	1,969	1,664	1,667	2,127	460	27.6	0.8
Polymer Product and Rubber Product Manufacturing	3,057	2,620	2,641	3,301	660	25.0	0.8
Non-Metallic Mineral Product Manufacturing	1,077	1,123	1,099	1,189	90	8.2	1.0
Primary Metal and Metal Product Manufacturing	812	541	565	543	-22	-3.9	-3.9
Fabricated Metal Product Manufacturing	3,031	2,424	2,427	2,418	-9	-0.4	-2.2
Transport Equipment Manufacturing	1,186	1,241	1,252	1,193	-59	-4.7	0.1
Machinery and Equipment Manufacturing	2,386	2,597	2,850	2,839	-12	-0.4	1.8
Furniture and Other Manufacturing	812	592	561	527	-34	-6.0	-4.2
<i>Manufacturing</i>	<i>29,820</i>	<i>28,188</i>	<i>28,856</i>	<i>30,305</i>	<i>1,449</i>	<i>5.0</i>	<i>0.2</i>
Building Construction	1,773	2,174	1,949	2,387	438	22.5	3.0
Heavy and Civil Engineering Construction	1,783	2,552	2,428	2,542	114	4.7	3.6
Construction Services	4,564	5,700	5,199	5,688	489	9.4	2.2
<i>Construction</i>	<i>8,120</i>	<i>10,427</i>	<i>9,576</i>	<i>10,617</i>	<i>1,041</i>	<i>10.9</i>	<i>2.7</i>
Basic Material Wholesaling	1,901	2,371	2,365	2,370	5	0.2	2.2
Machinery and Equipment Wholesaling	2,932	3,504	3,742	3,859	117	3.1	2.8
Motor Vehicle and Motor Vehicle Parts Wholesaling	811	810	838	958	120	14.3	1.7
Grocery Liquor and Tobacco Product Wholesaling	1,825	2,591	2,676	2,649	-27	-1.0	3.8
Other Goods Wholesaling	2,636	2,623	2,644	2,640	-3	-0.1	0.0
Commission-Based Wholesaling	289	319	338	347	9	2.8	1.8
Road Transport	3,790	4,936	4,856	5,030	174	3.6	2.9
Rail Transport	215	366	343	343	-1	-0.3	4.8
Water Transport	264	242	241	216	-24	-10.1	-2.0
Air and Space Transport	1,042	1,502	1,514	1,456	-58	-3.9	3.4
Other Transport	252	252	265	277	11	4.2	0.9
Postal and Courier Pick-up and Delivery Services	2,083	1,556	1,601	1,510	-91	-5.7	-3.2
Transport Support Services	1,558	2,100	2,180	2,233	53	2.4	3.7
Warehousing and Storage Services	582	760	820	816	-4	-0.4	3.4
<i>Wholesale and Distribution</i>	<i>20,180</i>	<i>23,931</i>	<i>24,424</i>	<i>24,704</i>	<i>281</i>	<i>1.1</i>	<i>2.0</i>
Motor Vehicle and Motor Vehicle Parts Retailing	915	997	1,041	1,117	76	7.3	2.0
Fuel Retailing	562	521	539	561	22	4.0	0.0
Food Retailing	2,608	3,448	3,595	3,772	177	4.9	3.8
Other Store-Based Retailing	4,625	6,019	6,305	6,452	147	2.3	3.4
Non-Store Retailing and Retail Commission Based Buying and/or Selling	71	107	146	158	12	8.5	8.3
Accommodation	799	829	847	773	-74	-8.8	-0.3
Food and Beverage Services	2,059	2,518	2,611	2,704	93	3.6	2.8
Repair and Maintenance	1,165	1,215	1,234	1,242	7	0.6	0.6
Personal and Other Services	1,431	1,666	1,646	1,652	6	0.3	1.4
Private Households Employing Staff	0	0	0	0	0	na	na
<i>Retail Trade and Services</i>	<i>14,236</i>	<i>17,320</i>	<i>17,965</i>	<i>18,431</i>	<i>466</i>	<i>2.6</i>	<i>2.6</i>
Electricity Supply	1,906	2,551	2,479	2,355	-124	-5.0	2.1
Gas Supply	186	192	196	180	-16	-8.2	-0.3
Water Supply Sewerage and Drainage Services	637	617	635	570	-66	-10.3	-1.1
Waste Collection Treatment and Disposal Services	1,377	1,721	1,700	1,802	102	6.0	2.7
Publishing (except Internet and Music Publishing)	588	426	350	324	-26	-7.4	-5.8
Motion Picture and Sound Recording Activities	265	243	245	236	-8	-3.4	-1.1
Broadcasting (except Internet)	415	420	419	442	23	5.5	0.6
Internet Publishing and Broadcasting	2	7	7	11	4	65.3	20.3
Telecommunications Services	6,888	11,537	11,433	11,347	-86	-0.7	5.1
Internet Service Providers Web Search Portals and Data Processing Services	4,006	2,736	2,572	2,486	-87	-3.4	-4.7
Library and Other Information Services	172	163	160	130	-29	-18.4	-2.7
Finance	3,636	5,131	5,240	5,229	-11	-0.2	3.7
Insurance and Superannuation Funds	1,023	1,617	1,752	1,781	29	1.7	5.7
Auxiliary Finance and Insurance Services	1,285	2,097	2,141	2,218	77	3.6	5.6
Rental and Hiring Services (except Real Estate)	2,254	2,820	2,879	2,959	80	2.8	2.8
Property Operators and Real Estate Services	1,307	1,446	1,525	1,676	151	9.9	2.5
Professional Scientific and Technical Services (exc Comp Sys Dsn & related)	8,600	10,704	11,128	11,445	317	2.8	2.9
Computer System Design and Related Services	1,569	1,969	2,258	2,406	148	6.6	4.4
Administrative Services	2,164	2,663	2,827	2,888	61	2.2	2.9
Building Cleaning Pest Control and Other Support Services	1,173	999	1,022	1,028	6	0.6	-1.3
<i>Business Services</i>	<i>39,453</i>	<i>50,061</i>	<i>50,967</i>	<i>51,514</i>	<i>546</i>	<i>1.1</i>	<i>2.7</i>
Heritage Activities	305	454	402	398	-4	-1.0	2.7
Artistic Activities	132	139	165	157	-9	-5.2	1.7
Sport and Recreation Activities	1,357	1,490	1,413	1,343	-70	-5.0	-0.1
Gambling Activities	163	145	147	162	15	10.2	-0.1
<i>Arts and Recreation Services</i>	<i>1,957</i>	<i>2,228</i>	<i>2,127</i>	<i>2,059</i>	<i>-68</i>	<i>-3.2</i>	<i>0.5</i>
Public Administration	3,368	5,363	5,363	5,617	254	4.7	5.2
Defence	795	1,111	1,035	1,006	-29	-2.8	2.4
Public Order Safety and Regulatory Services	1,874	3,043	3,055	3,032	-24	-0.8	4.9
Preschool and School Education	4,184	4,877	4,937	4,911	-26	-0.5	1.6
Tertiary Education	1,850	1,822	1,892	1,898	6	0.3	0.3
Adult Community and Other Education	642	586	534	541	7	1.3	-1.7
Hospitals	3,666	5,054	4,893	5,211	317	6.5	3.6
Medical and Other Health Care Services	2,961	4,147	4,024	4,079	55	1.4	3.3
Residential Care Services	2,079	3,043	3,063	3,175	112	3.6	4.3
Social Assistance Services	842	1,217	1,253	1,252	-2	-0.1	4.0
<i>Social Services</i>	<i>22,260</i>	<i>30,263</i>	<i>30,049</i>	<i>30,720</i>	<i>671</i>	<i>2.2</i>	<i>3.3</i>
<i>Subtotal</i>	<i>149,066</i>	<i>175,762</i>	<i>179,327</i>	<i>184,593</i>	<i>5,266</i>	<i>2.9</i>	<i>2.2</i>
Owner-Occupied Dwellings and Property Operators	22,429	26,510	26,820	27,046	225	0.8	1.9
TOTAL ALL INDUSTRIES	171,495	202,272	206,148	211,639	5,491	2.7	2.1
<i>Tourism sector</i>	<i>6,283</i>	<i>7,516</i>	<i>7,641</i>	<i>7,696</i>	<i>55</i>	<i>0.7</i>	<i>2.0</i>

Activity units for	2003	2011	2012	2013	change 2012-2013		Change 2003 to 2013 %pa
					Number	%	
Agriculture	71,574	61,642	60,683	58,008	-2,675	-4.4	-2.1
Aquaculture	375	306	319	293	-26	-8.2	-2.4
Forestry and Logging	5,633	5,112	5,006	4,924	-82	-1.6	-1.3
Fishing Hunting and Trapping	1,941	1,435	1,430	1,423	-7	-0.5	-3.1
Agriculture Forestry and Fishing Support Services	6,162	5,897	5,981	6,118	137	2.3	-0.1
Coal Mining	42	41	47	45	-2	-4.3	0.7
Oil and Gas Extraction	22	47	61	64	3	4.9	11.3
Metal Ore Mining	68	82	95	106	11	11.6	4.5
Non-Metallic Mineral Mining and Quarrying	334	360	350	345	-5	-1.4	0.3
Exploration and Other Mining Support Services	85	224	255	268	13	5.1	12.2
Primary	86,236	75,146	74,227	71,594	-2,633	-3.5	-1.8
Food Product Manufacturing	2,565	2,891	2,917	3,034	117	4.0	1.7
Beverage and Tobacco Product Manufacturing	391	600	607	634	27	4.4	5.0
Textile Leather Clothing and Footwear Manufacturing	2,178	1,769	1,691	1,632	-59	-3.5	-2.8
Wood Product Manufacturing	2,359	2,030	1,941	1,874	-67	-3.5	-2.3
Pulp Paper and Converted Paper Product Manufacturing	128	120	124	125	1	0.8	-0.2
Printing	1,568	1,456	1,415	1,399	-16	-1.1	-1.1
Petroleum and Coal Product Manufacturing	47	60	59	59	0	0.0	2.3
Basic Chemical and Chemical Product Manufacturing	545	524	530	525	-5	-0.9	-0.4
Polymer Product and Rubber Product Manufacturing	794	766	757	748	-9	-1.2	-0.6
Non-Metallic Mineral Product Manufacturing	928	947	952	962	10	1.1	0.4
Primary Metal and Metal Product Manufacturing	277	227	234	232	-2	-0.9	-1.8
Fabricated Metal Product Manufacturing	3,341	3,185	3,119	3,053	-66	-2.1	-0.9
Transport Equipment Manufacturing	1,599	1,599	1,577	1,561	-16	-1.0	-0.2
Machinery and Equipment Manufacturing	3,560	3,800	3,779	3,747	-32	-0.8	0.5
Furniture and Other Manufacturing	2,852	2,397	2,338	2,346	8	0.3	-1.9
Manufacturing	23,132	22,371	22,040	21,931	-109	-0.5	-0.5
Building Construction	13,202	17,338	17,094	17,211	117	0.7	2.7
Heavy and Civil Engineering Construction	1,657	1,788	1,827	1,856	29	1.6	1.1
Construction Services	27,254	31,357	31,084	31,342	258	0.8	1.4
Construction	42,113	50,483	50,005	50,409	404	0.8	1.8
Basic Material Wholesaling	3,395	4,053	4,050	4,083	33	0.8	1.9
Machinery and Equipment Wholesaling	4,811	4,751	4,752	4,722	-30	-0.6	-0.2
Motor Vehicle and Motor Vehicle Parts Wholesaling	1,789	1,725	1,749	1,748	-1	-0.1	-0.2
Grocery Liquor and Tobacco Product Wholesaling	2,488	2,452	2,529	2,544	15	0.6	0.2
Other Goods Wholesaling	6,409	6,341	6,215	6,130	-85	-1.4	-0.4
Commission-Based Wholesaling	1,110	829	813	783	-30	-3.7	-3.4
Road Transport	8,025	8,567	8,493	8,424	-69	-0.8	0.5
Rail Transport	92	58	58	59	1	1.7	-4.3
Water Transport	165	230	226	204	-22	-9.7	2.1
Air and Space Transport	423	434	435	435	0	0.0	0.3
Other Transport	747	1,027	1,014	1,009	-5	-0.5	3.1
Postal and Courier Pick-up and Delivery Services	3,417	3,473	3,447	3,519	72	2.1	0.3
Transport Support Services	1,228	1,361	1,422	1,457	35	2.5	1.7
Warehousing and Storage Services	573	676	701	721	20	2.9	2.3
Wholesale and Distribution	34,672	35,977	35,904	35,838	-66	-0.2	0.3
Motor Vehicle and Motor Vehicle Parts Retailing	2,848	3,042	2,997	3,034	37	1.2	0.6
Fuel Retailing	1,533	1,195	1,182	1,178	-4	-0.3	-2.6
Food Retailing	5,696	6,238	6,366	6,496	130	2.0	1.3
Other Store-Based Retailing	18,428	20,926	20,659	20,665	6	0.0	1.2
Non-Store Retailing and Retail Commission Based Buying and/or Selling	1,328	1,709	1,774	1,902	128	7.2	3.7
Accommodation	4,439	5,003	4,947	4,986	39	0.8	1.2
Food and Beverage Services	11,928	14,455	14,549	14,740	191	1.3	2.1
Repair and Maintenance	9,372	9,909	9,967	9,995	28	0.3	0.6
Personal and Other Services	10,258	12,333	12,342	12,468	126	1.0	2.0
Private Households Employing Staff	0	0	0	0	0	na	na
Retail Trade and Services	65,830	74,810	74,783	75,464	681	0.9	1.4
Electricity Supply	202	258	258	270	12	4.7	2.9
Gas Supply	35	31	35	36	1	2.9	0.3
Water Supply Sewerage and Drainage Services	161	228	229	232	3	1.3	3.7
Waste Collection Treatment and Disposal Services	783	894	916	924	8	0.9	1.7
Publishing (except Internet and Music Publishing)	845	985	999	993	-6	-0.6	1.6
Motion Picture and Sound Recording Activities	2,032	2,966	3,113	2,976	-137	-4.4	3.9
Broadcasting (except Internet)	281	267	268	276	8	3.0	-0.2
Internet Publishing and Broadcasting	10	71	75	93	18	24.0	25.0
Telecommunications Services	312	386	379	450	71	18.7	3.7
Internet Service Providers Web Search Portals and Data Processing Services	438	488	483	498	15	3.1	1.3
Library and Other Information Services	309	340	343	342	-1	-0.3	1.0
Finance	8,368	24,995	24,454	24,515	61	0.2	11.3
Insurance and Superannuation Funds	1,491	907	894	862	-32	-3.6	-5.3
Auxiliary Finance and Insurance Services	4,770	5,886	5,731	5,601	-130	-2.3	1.6
Rental and Hiring Services (except Real Estate)	6,289	5,762	5,720	5,718	-2	0.0	-0.9
Property Operators and Real Estate Services	60,569	91,655	92,241	95,464	3,223	3.5	4.7
Professional Scientific and Technical Services (exc Comp Sys Dsn & related)	31,448	41,747	42,040	42,765	725	1.7	3.1
Computer System Design and Related Services	6,765	9,473	9,778	10,042	264	2.7	4.0
Administrative Services	6,942	8,786	8,860	9,420	560	6.3	3.1
Building Cleaning Pest Control and Other Support Services	4,986	6,909	6,989	7,229	240	3.4	3.8
Business Services	137,036	203,034	203,805	208,706	4,901	2.4	4.3
Heritage Activities	417	510	512	486	-26	-5.1	1.5
Artistic Activities	2,412	2,989	3,048	3,015	-33	-1.1	2.3
Sport and Recreation Activities	5,555	6,196	6,190	6,291	101	1.6	1.3
Gambling Activities	220	195	185	170	-15	-8.1	-2.5
Arts and Recreation Services	8,604	9,890	9,935	9,962	27	0.3	1.5
Public Administration	1,485	1,300	1,267	1,216	-51	-4.0	-2.0
Defence	69	54	53	57	4	7.5	-1.9
Public Order Safety and Regulatory Services	2,309	2,553	2,544	2,529	-15	-0.6	0.9
Preschool and School Education	5,124	5,496	5,575	5,595	20	0.4	0.9
Tertiary Education	711	831	895	877	-18	-2.0	2.1
Adult Community and Other Education	2,676	3,543	3,562	3,628	66	1.9	3.1
Hospitals	257	220	210	208	-2	-1.0	-2.1
Medical and Other Health Care Services	11,753	15,054	15,112	15,352	240	1.6	2.7
Residential Care Services	1,370	1,382	1,391	1,391	0	0.0	0.2
Social Assistance Services	2,212	3,050	3,073	3,151	78	2.5	3.6
Social Services	27,966	33,483	33,682	34,004	322	1.0	2.0
TOTAL ALL INDUSTRIES	425,589	505,194	504,381	507,908	3,527	0.7	1.8
Tourism sector	17,731	19,762	20,194	20,376	182	0.9	1.4

Table 8.20 Employment in Key Sectors, New Zealand, 2003 to 2013

Key sectors employment (FTEs)					%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Primary production	140,845	145,232	142,340	142,892	0.4	0.1
Primary processing	96,730	92,494	94,995	95,552	0.6	-0.1
Creative	47,834	44,386	41,958	40,587	-3.3	-1.6
Education and research	130,037	160,866	159,911	158,861	-0.7	2.0
Engineering, machinery and equipment manufacturing	26,809	33,508	36,059	36,278	0.6	3.1
Key sectors (excluding Tourism)	442,254	476,486	475,264	474,170	-0.2	0.7
Non-key sectors	1,183,238	1,384,281	1,403,320	1,408,880	0.4	1.8
Total employment: New Zealand	1,625,492	1,860,767	1,878,583	1,883,050	0.2	1.5
Tourism sector	90,873	97,143	99,758	100,251	0.5	1.0

Source: BERL Regional Database 2013

Table 8.21 GDP in Key Sectors, New Zealand, 2003 to 2013

Key sectors GDP (2013\$m)					%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Primary production	13,042	13,343	15,363	16,242	5.7	2.2
Primary processing	12,722	12,776	13,271	13,582	2.3	0.7
Creative	1,951	2,025	2,107	2,084	-1.1	0.7
Education and research	7,606	8,372	8,492	8,474	-0.2	1.1
Engineering, machinery and equipment manufacturing	2,497	3,100	3,413	3,459	1.4	3.3
Key sectors (excluding Tourism)	37,817	39,615	42,646	43,842	2.8	1.5
Non-key sectors	133,679	162,657	163,502	167,797	2.6	2.3
Total GDP: New Zealand	171,495	202,272	206,148	211,639	2.7	2.1
Tourism sector	6,283	7,516	7,641	7,696	0.7	2.0

Source: BERL Regional Database 2013

Table 8.22 Business Units in Key Sectors, New Zealand, 2003 to 2013

Key sectors business units					%pa change	
	2003	2011	2012	2013	2012 to 2013	2003 to 2013
Primary production	86,236	75,146	74,227	71,594	-3.5	-1.8
Primary processing	5,315	5,521	5,465	5,542	1.4	0.4
Creative	15,122	18,006	18,201	18,228	0.1	1.9
Education and research	9,425	11,049	11,277	11,393	1.0	1.9
Engineering, machinery and equipment manufacturing	6,738	7,906	8,057	8,184	1.6	2.0
Key sectors (excluding Tourism)	122,836	117,628	117,227	114,941	-2.0	-0.7
Non-key sectors	302,753	387,566	387,154	392,967	1.5	2.6
Total business units: New Zealand	425,589	505,194	504,381	507,908	0.7	1.8
Tourism sector	17,731	19,762	20,194	20,376	0.9	1.4

Source: BERL Regional Database 2013



