Report to:

Otago Forward

OTAGO REGIONAL AND SUB-REGIONAL ECONOMIC PROFILE

2008 – 2009

(YE MARCH)

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Otago regional and sub-regional economic profile 1999 – 2009[1]

[1] This summary is based on data generated from the BERL Regional Database, which in turn sources information from the annual Business Directory Update Survey and IRD returns information from Statistics New Zealand. The BERL Regional Database incorporates a full set of annual data for the 1994-2009 period across 72 New Zealand Territorial Local Authorities (TLAs). Population figures have been recalculated to incorporate the release of 2006 census data. All references to value added growth refer to increases in volume or real terms - i.e. in constant price terms or after removal of the effects of price inflation. All references to employment relate to FTEs (i.e. Full-Time Equivalents). Years refer to years ended 31 March.

1 Summary of the Otago Region economy

This report has been prepared for Otago Forward, and describes the performance of the Otago Region economy in 2009, as well as over the longer term. The report also provides an overview of the five local economies that make up the Region – Central Otago District, Clutha District, Dunedin City, Queenstown-Lakes District, and Waitaki District.

Composition of the economy

As of 2009, the Region employed 91,100 FTEs, producing $8.14 billion in GDP through 26,400 businesses.

Sector (2009)	FTEs	*% of Otago*	*% of NZ*	GDP (09$m)	*% of Otago*	*% of NZ*	Bus. units	*% of Otago*	*% of NZ*
Primary	10,389	*11.4%*	*6.8%*	838	*10.3%*	*6.4%*	4,913	*18.6%*	*6.3%*
Manufacturing	10,178	*11.2%*	*4.4%*	1,198	*14.7%*	*4.7%*	972	*3.7%*	*4.0%*
Construction	8,191	*9.0%*	*5.5%*	462	*5.7%*	*5.5%*	2,856	*10.8%*	*5.6%*
Retail and Distribution	23,914	*26.2%*	*4.9%*	1,591	*19.6%*	*4.3%*	5,091	*19.3%*	*5.2%*
Business Services	13,516	*14.8%*	*3.8%*	2,565	*31.5%*	*3.7%*	9,051	*34.3%*	*4.6%*
Recreation Services	6,009	*6.6%*	*5.1%*	321	*3.9%*	*5.1%*	1,856	*7.0%*	*5.6%*
Social Services	18,934	*20.8%*	*5.1%*	1,163	*14.3%*	*4.5%*	1,628	*6.2%*	*5.2%*
Totals	**91,130**	***100.0%***	***4.9%***	**8,139**	***100.0%***	***4.4%***	**26,367**	***100.0%***	***5.1%***

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Retail and distribution employed more than one in four workers (a large share of whom were in tourism), contributed one-fifth of GDP, and accounted for one-fifth of businesses. Business services had a lower share of employment (15 percent) but around one-third of GDP and business units.

2009 performance

The major story in 2009 was the global downturn. This was highlighted in the Otago Region with the reduction in operations by Fisher and Paykel, which led to the direct loss of more than 400 FTEs. While this loss was not directly attributable to the global slowdown, and was linked to an earlier need for restructuring, the slowdown was almost certainly a contributing factor.

Key Performance Indicators	%pa for 2009 year		
	Otago Region	Excl. Q-L District	New Zealand
Resident population growth	**0.8**	0.6	1.1
Real Value Added (GDP) growth	**-0.5**	-1.0	-1.1
GDP per capita growth	**-1.3**	-1.5	-2.2
Employment growth	**0.8**	0.7	0.7
Labour productivity growth	**-1.4**	-1.8	-1.9
Business units growth	**1.1**	0.8	0.3
Business size growth	**-0.3**	-0.1	0.3

Source: BERL, Statistics NZ

Nevertheless, the Region performed remarkably well, with growth in employment overall, and a decline in GDP far lower than that seen across the country. Similarly, labour productivity fell by less than the national average, while the number of businesses in the Region continued to grow well.

The decade

Over the 10 years to 2009, the Region has again done well across most indicators compared to the country as a whole.

Key Performance Indicators	%pa for 1999-2009		
	Otago Region	Excl. Q-L District	New Zealand
Resident population growth	**1.0**	0.5	1.2
Real Value Added (GDP) growth	**3.1**	2.4	3.1
GDP per capita growth	**2.1**	2.0	1.8
Employment growth	**2.8**	2.2	2.4
Productivity growth	**0.4**	0.4	0.8
Business units growth	**3.7**	2.5	3.0
Business size growth	**-0.9**	-0.3	-0.6

Source: BERL, Statistics NZ

GDP has grown in line with national trends, while employment has grown faster, as has business units. One negative has been the slower than national rise in labour productivity, possibly linked to the rapid rise in employment, which is often associated with difficulty in maintaining productivity gains.

A major challenge facing the Region long-term is the low rate of population growth. The regional average of 1.0 percent for the last decade masks a story of two halves. Most of this growth was in Queenstown-Lakes District. Population growth across the other four local economies was just 0.5 percent a year.

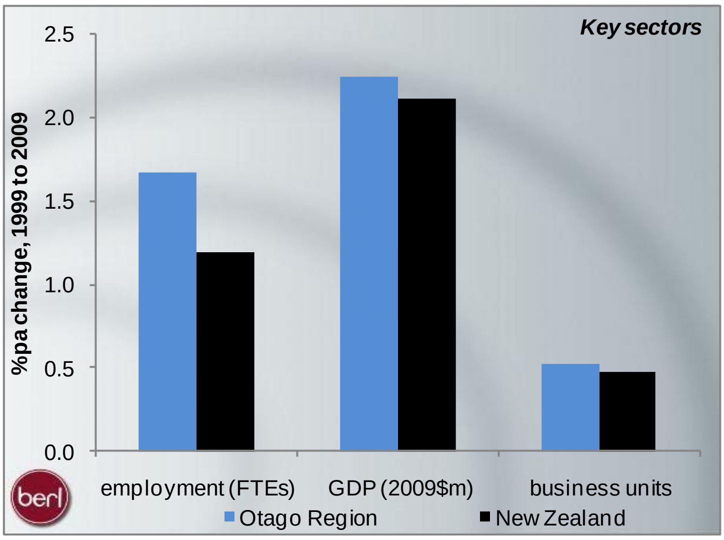
The impact of Queenstown-Lakes District is evident from comparing the first and second columns in the table above. While population or employment-adjusted indicators such as GDP per capita or labour productivity remain much the same, excluding Queenstown-Lakes District from the equation results in significantly lower overall growth in employment, GDP and business numbers, which subsequently fall below the national average.

Six key sectors

Growth across the six key sectors covered in this report – tourism; creative; education and research; primary production; primary processing; and engineering, and machinery and equipment manufacturing – has been mixed in the latest year and the decade.

Tourism has grown strongly across measures of employment, GDP and business units. While education and research employment has risen sharply, GDP has not increased to the same extent. The primary processing sector has enjoyed strong gains in labour productivity, pushing GDP higher off moderate employment rises. Although the creative sector has seen the number of businesses increase by two-thirds since 1999, employment growth has been moderate, indicating that many people are forming their own, smaller companies.

Overall, the six key sectors have enjoyed stronger employment, GDP and business unit growth than the same sectors at a national level.



2 Introduction

This report has been prepared for Otago Forward, and describes the performance of the Otago Region economy in 2009, as well as over the longer term. The report also provides an overview of the five local economies that make up the Region – Central Otago District, Clutha District, Dunedin City, Queenstown-Lakes District, and Waitaki District.

Chapters 3 to 8 deal specifically with the Regional economy as a whole. These chapters look at employment; GDP and labour productivity; business units and size; fastest-growing industries; location quotients; and six key Regional sectors. The key sectors we look at in more detail are tourism; creative; education and research; primary production; primary processing; and engineering, and machinery and equipment manufacturing.

Chapters 9 to 13 deal with each of the five local economies individually, covering the same areas for each of those economies as chapters 3 to 8 do for the Region. We also cover additional sectors for Dunedin Region, Central Otago and Waitaki as we have in previous years.

Data is for the year ending March 2009, unless more recent data is available. This is because estimates of employment, GDP and business units are based on Business Demography data. This data is gathered in February / March each year, and covers all economically significant businesses, but is usually only finalised and made available for analysis purposes in October / November of the same year.

2.1 Complementarity with the Otago Regional Economic Development Strategy

An important premise for this project was to ensure that it helped support the Otago Regional Economic Development Strategy. To this end, we have provided a range of indicators that can be tracked annually and historically (back to 1994). In addition, the six key sectors were chosen to correspond with priority areas highlighted in the Otago Forward Ten Year Economic Development Strategy for Otago, published in 2008. Some of the key points of the Strategy that are relevant to this report and to the choice of key sectors to examine in particular include:

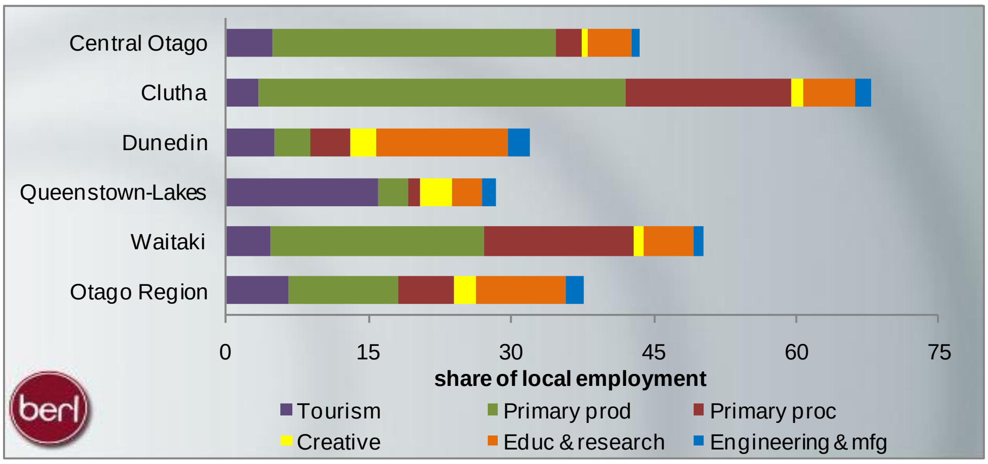
- avoiding intra-Regional activities that undermine other local economies
- focusing on existing champions. e.g. education and research sector in Dunedin; tourism in Queenstown-Lakes; and primary production in Clutha, Central Otago and Waitaki.
- developing the creative sector
- the Region's mix of primary production, processing, and service industries.

- the important role of tourism nationally and Regionally.

The sectors covered are not always the largest employers in the Region or its constituent economies. Rather, they cover the primary, secondary and tertiary components of the economy, and are a mix of labour and capital intensive industries.

Nevertheless, the six sectors do contribute significantly to employment in each local economy, as summarised in Figure 2.1.

Figure 2.1 Employment in key sectors by local economy, 2009



Around 36 percent of the Region's FTEs are employed in the six key sectors. As the figure shows, the different sectors are represented as vastly different proportions of employment in each of the local economies.

We have also included a section for each local economy and the Region overall that lists industries that have shown strong growth over the last three years. This will help local authorities to develop policies that nurture these potential future champions.

3 Employment

This chapter looks at employment trends in the Otago Region and compares them to trends in New Zealand.

Table 3.1 shows employment numbers for the Otago Region for the last three periods and the longer term. It also shows the aggregate change over the same period for New Zealand.

Table 3.1 Otago Region employment summary

	Employment Number FTEs				%pa change		
Sector	**1999**	**2007**	**2008**	**2009**	**2007 to 2008**	**2008 to 2009**	**1999 to 2009**
Primary	8,845	10,383	10,247	10,389	-1.3	1.4	1.6
Manufacturing	10,123	11,106	10,839	10,178	-2.4	-6.1	0.1
Construction	4,265	7,898	8,377	8,191	6.1	-2.2	6.7
Retail and Distribution	18,704	24,452	23,733	23,914	-2.9	0.8	2.5
Business Services	8,404	12,444	13,548	13,516	8.9	-0.2	4.9
Recreation Services	3,570	5,926	5,958	6,009	0.5	0.8	5.3
Social Services	15,028	17,455	17,737	18,934	1.6	6.7	2.3
Otago Region	**68,939**	**89,664**	**90,440**	**91,130**	**0.9**	**0.8**	**2.8**
New Zealand	**1,473,526**	**1,840,284**	**1,854,636**	**1,866,747**	**0.8**	**0.7**	**2.4**

Source: BERL, Statistics NZ

The Region employed around 91,100 FTEs in 2009. The largest sectors were retail and distribution, with 26 percent of FTEs, followed by social services, with 21 percent. These figures point to the importance of tourism (mostly centred in the retail and distribution sector) and education and research (social services) in the Region.

Growth in employment in the Region has outperformed national averages in the last two years and since 1999. The fastest growth has been in construction, led mostly by the boom seen in the Queenstown-Lakes District; recreation services, led by the wealth effect as house prices rose and people felt they had more disposable income for use on entertainment and recreation; and business services, led by the nationwide structural move toward financial and other business services.

All sectors saw growth across the decade, but growth in manufacturing was negligible, all but eliminated by the reduction in operations of Fisher and Paykel's Dunedin plant. The impacts of this event are evident throughout this report.

3.1 The business services sector

One sector worth looking at in greater depth is the business services sector, given its size and rapid growth over the last 10 years.

In New Zealand overall, 19 percent of employment is in business services, but the figure for Otago region is 15 percent. Nevertheless, the figure for Otago is up from 12 percent in 1999, suggesting that it is becoming an increasingly important part of the local economy, and that greater portions of business services are being offered at a local level, rather than being based out of Christchurch. Over the same time, the national share of the business services has risen from 17 to 19 percent.

The business services 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. The other business services industry itself includes a large range of services, from research to architectural, computer, legal, accounting, and cleaning services.

Table 3.2 presents the largest industries in the business services sector in the Otago Region in 2009.

Table 3.2 Largest industries in the business services sector

Largest business services industries	FTEs
Employment Placement Services	1,112
Business Management Services	819
Accounting Services	782
Banks	754
Legal Services	739
Cleaning Services	734
Real Estate Agents	709
Consultant Engineering Services	567
Business Administrative Services	494
Commercial Property Operators and Developers nec	458
Business Services nec	454
Postal Services	398
Security and Investigative Services (except Police)	379
Other	5,116

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Employment placement services, which includes temporary staffing, employed over 1,100 FTEs. Business management services had over 800 FTEs, followed by the characteristic industries within business services, including accounting, banking, and legal services. Within property services, real estate agents were the largest group, at a little over 700, followed by property operators and developers with 460 FTEs. Within communication services, postal services was the largest employer, with nearly 400 FTEs in the Region.

4 Value added (GDP)

This chapter looks at value added, or GDP, for the Otago Region.

Table 4.1 describes the GDP for the Otago Region, and compares its performance to that of New Zealand.

Table 4.1 Otago Region GDP summary

	Value Added or GDP (2009$m)				%pa change		
Sector	**1999**	**2007**	**2008**	**2009**	**2007 to 2008**	**2008 to 2009**	**1999 to 2009**
Primary	681	840	858	838	2.2	-2.3	2.1
Manufacturing	985	1,291	1,289	1,198	-0.1	-7.0	2.0
Construction	238	455	492	462	8.0	-6.1	6.8
Retail and Distribution	1,131	1,594	1,611	1,591	1.0	-1.2	3.5
Business Services	1,832	2,355	2,450	2,565	4.0	4.7	3.4
Recreation Services	195	326	323	321	-0.7	-0.9	5.1
Social Services	957	1,111	1,153	1,163	3.8	0.8	2.0
Otago Region	**6,020**	**7,971**	**8,176**	**8,139**	**2.6**	**-0.5**	**3.1**
New Zealand	**136,841**	**181,968**	**187,651**	**185,554**	**3.1**	**-1.1**	**3.1**

Source: BERL, Statistics NZ

The Region performed remarkably well in a negative operational environment in 2009, with GDP down just 0.5 percent, compared with a 1.1 percent fall nationally. Over the 10 years to 2009, GDP has grown at a similar rate Regionally and nationally.

In 2009, Otago GDP stood at $8.14 billion, or 4.4 percent of national GDP. The largest contributor was business services, with 32 percent of Regional GDP despite having just 15 percent of the workforce. In other words, business services tend to have a higher average labour productivity than the local economy as a whole.

Retail and distribution accounts for 19 percent of GDP, while manufacturing, and social services each provide 14 to 15 percent of GDP.

All sectors have enjoyed moderate to strong GDP growth since 1999, with the strongest gains in construction (up 6.8 percent a year), recreation services (5.1 percent a year), business services (3.5 percent a year), and retail and distribution (3.5 percent a year).

4.1 Labour productivity

Labour productivity is the average GDP produced by each FTE. In this analysis, we look at the labour productivity of each sector in the Region, as shown in Table 4.2. We also provide the overall labour productivity for the Region, and compare this with the national figure.

Table 4.2 Otago Region labour productivity summary[2]

Sector	Productivity (2009$ per FTE) 1999	2007	2008	2009	%pa change 2007 to 2008	2008 to 2009	1999 to 2009
Primary	76,948	80,858	83,737	80,711	3.6	-3.6	0.5
Manufacturing	97,272	116,205	118,931	117,738	2.3	-1.0	1.9
Construction	55,910	57,658	58,732	56,407	1.9	-4.0	0.1
Retail and Distribution	60,473	65,203	67,871	66,549	4.1	-1.9	1.0
Business Services (#)	158,722	145,739	140,499	148,664	-3.6	5.8	-0.7
Recreation Services	54,753	54,937	54,270	53,347	-1.2	-1.7	-0.3
Social Services	63,700	63,643	65,015	61,413	2.2	-5.5	-0.4
Otago Region (#)	**80,092**	**82,863**	**84,365**	**83,210**	**1.8**	**-1.4**	**0.4**
New Zealand (#)	**85,181**	**92,168**	**94,419**	**92,607**	**2.4**	**-1.9**	**0.8**

 # excl owner-occupied dwellings sector *Source: BERL, Statistics NZ*

Overall, the Otago Region has a labour productivity of $83,200 per FTE, which is around 10 percent below the national average. Although the figure fell in 2009, the decline of 1.4 percent in labour productivity was significantly better than the 1.9 percent decrease seen nationally.

The two highest labour productivity figures are in business services ($149,000 per FTE) and manufacturing ($118,000 per FTE). In business services, this is a result of the high proportion of highly skilled workers, such as architects and engineering consulting services. In manufacturing, the high labour productivity is usually the result of high capital to labour ratios.

Over the decade, labour productivity growth in the Region has been more sedate. This may be the result of the strong employment growth the Region has enjoyed. When employment increases rapidly, labour productivity growth tends to lag.

As a result of moderate GDP gains off flat employment rises, manufacturing has seen excellent increases in labour productivity. Retail and distribution has enjoyed solid labour productivity growth of 1.0 percent a year, while the other three service sectors have experienced falling labour productivity as employment has expanded strongly.

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[2] 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 - but it does not employ people. This then biases labour productivity, especially in the property services industry and business services industry group. To remove the bias, ownership of owner-occupied dwellings has been excluded from all calculations of labour productivity. However, for overall consistency purposes, we need to include ownership of owner-occupied dwellings in our total GDP figures.

To provide context when considering the impact of the property services industry, at a national level the industry contributes around 11 percent of total GDP. Ownership of Owner-Occupied Dwellings contributes around 6 percent of total GDP or makes up around 55 percent of the property services industry.

5 Business units and size

This chapter presents the change in the number of business units in Otago Region between 1999 and 2009, and compares the trend to that in New Zealand, as presented in Table 5.1. It also discusses changes in average business size over the last decade.

An increase in business units within a sector means there is confidence in the future of that sector in the Region. It also means that intermediate and final consumers in the Region have greater access to a wider choice of products and services.

Table 5.1 Otago Region business units summary

	Business Units (number)				%pa change		
Sector	**1999**	**2007**	**2008**	**2009**	**2007 to 2008**	**2008 to 2009**	**1999 to 2009**
Primary	5,410	5,178	5,027	4,913	-2.9	-2.3	-1.0
Manufacturing	828	996	991	972	-0.5	-1.9	1.6
Construction	1,343	2,660	2,840	2,856	6.8	0.6	7.8
Retail and Distribution	4,132	5,017	5,063	5,091	0.9	0.6	2.1
Business Services	3,924	8,236	8,751	9,051	6.3	3.4	8.7
Recreation Services	1,297	1,782	1,836	1,856	3.0	1.1	3.6
Social Services	1,324	1,534	1,584	1,628	3.3	2.8	2.1
Otago Region	**18,258**	**25,403**	**26,092**	**26,367**	**2.7**	**1.1**	**3.7**
New Zealand	**379,701**	**500,728**	**511,030**	**512,580**	**2.1**	**0.3**	**3.0**

Source: BERL, Statistics NZ

Business units continue to increase in the Otago region, at rates well above the national average. In 2009, for instance, 280 new businesses were added in the Region, a rise of 1.1 percent, compared with just 0.3 percent nationally. Over the 10 years to 2009, the Region added 8,110 businesses, an increase of 44 percent, or 3.7 percent a year. Over the same time, New Zealand added 35 percent to its business units stock, or 3.0 percent a year.

In 2009, all sectors apart from primary and manufacturing continued to grow. Business services rose to 34 percent of all businesses in the Region (with 15 percent of employment and 31 percent of GDP).

Over the decade, the numbers of business units in construction and business services have each more than doubled. Between them these two sectors have added 6,640 business units (82 percent of all new business units in the Region).

Only the primary sector has seen business units fall as the sector has consolidated, with more workers producing more GDP in fewer separate business entities.

5.1 Business size

Business size refers to the average number of FTEs per business. Table 5.2 shows the changes in average business size at the seven sector level and the Regional level for Otago, compared with national trends.

Table 5.2 Otago Region business size summary

	Business Size (FTEs per unit)				%pa change		
Sector	**1999**	**2007**	**2008**	**2009**	**2007 to 2008**	**2008 to 2009**	**1999 to 2009**
Primary	1.6	2.0	2.0	2.1	1.7	3.7	2.6
Manufacturing	12.2	11.2	10.9	10.5	-1.9	-4.3	-1.5
Construction	3.2	3.0	2.9	2.9	-0.7	-2.8	-1.0
Retail and Distribution	4.5	4.9	4.7	4.7	-3.8	0.2	0.4
Business Services	2.1	1.5	1.5	1.5	2.5	-3.2	-3.5
Recreation Services	2.8	3.3	3.2	3.2	-2.4	-0.2	1.6
Social Services	11.4	11.4	11.2	11.6	-1.6	3.9	0.2
Otago Region	**3.8**	**3.5**	**3.5**	**3.5**	**-1.8**	**-0.2**	**-0.9**
New Zealand	**3.9**	**3.7**	**3.6**	**3.6**	**-1.3**	**0.4**	**-0.6**

Source: BERL, Statistics NZ

Business size in Otago Region overall is similar to that of New Zealand. After dropping sharply between 1999 and 2007, the average size has stabilised at around 3.5 FTEs per business, compared with the national average of 3.6 FTEs.

Business size typically shrinks when an economy is doing well, and individuals feel confident in leaving their current employment to establish their own businesses. Two sectors characterised by this behaviour are business services and construction, which is why these two sectors have recorded larger than average business size reductions since 1999.

The fall in business size in the manufacturing sector is largely affected by the significant one-off reduction in employment at the Fisher and Paykel plant in the 2009 figures.

6 Fastest-growing industries

This chapter presents the fastest growing industries in terms of FTE employment and GDP earnings. Industries are compared at the 53-industry level. The analysis only covers industries that have over 50 FTEs and, for GDP, those industries earning over $4.5 million.

6.1 Employment

Table 6.1 presents the ten fastest growing industries in Otago Region by FTE employment.

Table 6.1 Ten fastest growing industries by FTE growth

Rank by FTE growth	Industry	FTEs				%pa growth	
		2006	2007	2008	2009	2008 to 2009	2006 to 2009
1	Services to Mining	2	58	77	83	8.4	223.8
2	Metal Ore Mining	89	139	151	188	24.0	28.1
3	Services to Finance and Insurance	479	553	603	599	-0.5	7.8
4	Air and Space Transport	201	199	203	249	22.8	7.4
5	Finance	865	1,019	1,044	1,066	2.1	7.2
6	Commercial Fishing	113	119	123	138	12.0	6.7
7	Business Services	7,516	8,202	9,275	9,114	-1.7	6.6
8	Other Services	1,503	1,597	1,621	1,761	8.7	5.4
9	Government Administration	1,616	1,642	1,752	1,876	7.1	5.1
10	Education	7,481	7,954	7,944	8,337	4.9	3.7

Source: BERL, Statistics NZ

Two mining industries dominate the list. As gold mining operations have expanded in Waitaki, and oil and gas exploration has commenced in the Great South Basin, services to mining, mostly based in Dunedin, have grown rapidly.

The Region's move toward a more business services-oriented economy is evidenced by growth in finance, insurance and other business services.

Between them, these 10 industries have added 3,550 FTEs in the last three years, or 123 percent of all net new employment. In other words, all other industries together have seen a net reduction in employment. In absolute terms, the largest growth has been in the business services industry (more narrowly defined than the business services sector), up 1,600 FTEs, followed by education (860 FTEs), and other services and government administration (260 FTEs each).

6.2 GDP

Table 6.2 presents the ten fastest growing industries by GDP growth in the three years to March 2009.

Table 6.2 Ten fastest growing industries by GDP

Rank by GDP growth	Industry	GDP (2009$m)				%pa growth	
		2006	2007	2008	2009	2008 to 2009	2006 to 2009
1	Metal Ore Mining	35	36	59	56	-4.5	16.5
2	Finance	228	276	308	326	5.7	12.5
3	Services to Finance and Insurance	48	54	61	64	6.1	10.1
4	Business Services	527	567	660	659	-0.2	7.7
5	Petroleum, Coal, Chemical & Assoc Prod Mfg	27	24	28	33	18.1	6.9
6	Air and Space Transport	32	33	35	38	9.0	5.8
7	Government Administration	209	222	243	245	0.8	5.4
8	Motor Vehicle Retailing and Services	128	134	141	143	1.5	3.8
9	Personal and Household Good Wholesaling	149	150	154	166	7.5	3.5
10	Health Services	381	383	401	422	5.3	3.5

Source: BERL, Statistics NZ

Unsurprisingly, most of the industries that have seen employment rise fastest are also on the list for most rapid GDP growth.

Also notable is health services, up 3.5 percent a year, not a massive percentage, but important in absolute terms, as one of the largest industries in the Region.

These 10 industries account for more than 148 percent of net GDP growth in the Region since 2006. These 10 industries produced $386 million more in GDP in 2009 than in 2006, while total GDP per year in the Region rose $261 million. In other words, all other industries have, together, seen GDP fall.

7 Location quotients

This section looks at the concentration of industries in Otago Region compared to the national average. Again the analysis is at the 53-industry level.

The location quotient is a measure that helps analysts examine the relative concentration of industry employment in a particular area relative to another larger, or base, area. In this case, New Zealand is the base area. The measures provide a potentially valuable insight into a local labour market's industry structure, relative to the larger base area.

When the ratio is larger than 1.0 the percentage of those employed in the industry locally is higher than the percentage of those employed in the larger area. Likewise, when the ratio is smaller than 1.0 the percentage of people employed in this industry locally is smaller than the larger area.

Generally, when the location quotient is larger than 1.0, it means the local economy has a particularly high concentration of employment in that industry. On the positive side, this suggests the local economy has a comparative advantage in that industry, and is supplying other parts of the country. On the negative side, it means that a downturn in that industry is likely to have a larger impact on the local economy than elsewhere in New Zealand.

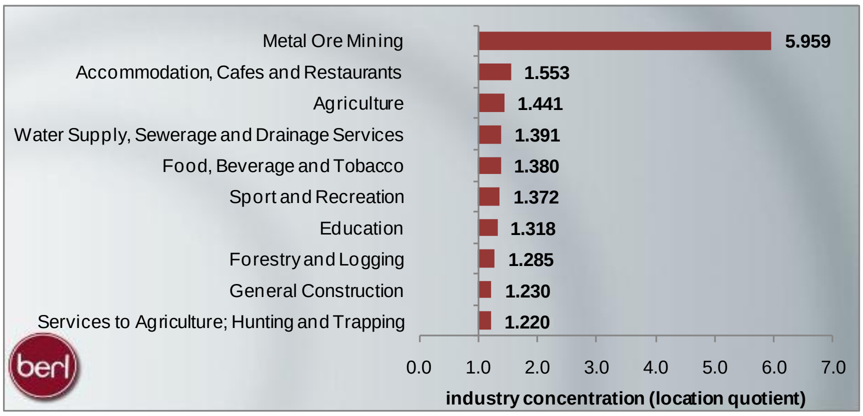
When the location quotient is less than 1.0, it means the local economy has a relatively low share of employment in that industry compared to nationally. This means that the area is reliant on other parts of the country to provide the goods or services in this industry, as the industry is under-represented locally.

The wider the area being examined, the closer to 1.0 values are likely to be. Thus, at an Otago Region level, we do not see location quotients as high or as low as if we were examining a smaller local economy such as Waitaki District.

Figure 7.1 shows the ten industries with the highest location quotients. Because of the small numbers in some industries in Otago Region, we only compare those industries that have at least 50 FTEs.[3]

[3] Fifty-one industries in Otago Region employ over 50 FTEs. Two industries do not have a presence in Otago Region – oil and gas exploration; and private households employing staff.

Figure 7.1 Ten industries with the highest FTE location quotients

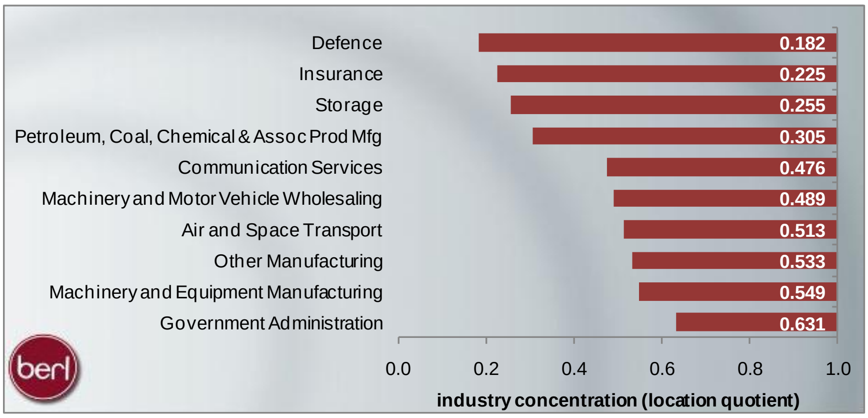


Metal ore mining has a concentration of 5.96 across the Region as a whole. That means on average, workers in Otago are six times more likely to be employed in metal ore mining than in New Zealand as a whole. Of course this employment is based almost exclusively in Waitaki District, where it has a concentration of 58.8. Similarly, accommodation, cafés and restaurants has a concentration of 1.55 for the Region, but 4.49 in Queenstown-Lakes District, the Region's main tourism destination.

The mix of industries in the Region is evident from the industries on the graph. A range of primary, manufacturing, social services, and recreation services industries are present.

Figure 7.2 shows the ten industries with the lowest location quotients in Otago Region. In other words, these industries, while they have some representation in the Region, are ones in which workers at a national level are far more likely to be employed than in the Region.

Figure 7.2 Ten industries with the lowest FTE location quotients



Workers in Otago are five times less likely to be employed in defence than in New Zealand overall. Despite an international airport in Dunedin, the fact that most flights into the Region are staffed by crew who live outside the Region means the share of employment in air transport is below the national average.

8 Key sectors in the Region

This chapter summarises the performance of six key sectors highlighted in the Economic Development Strategy for Otago Region, and in our analysis of major employers in the Region. The performance of each sector is assessed in terms of changes in employment, GDP, and business units.

The six key sectors are tourism; creative; education and research; primary production; primary processing; and engineering, and machinery and equipment manufacturing.

Table 8.1 presents the recent and longer-term direct contribution of employment in the six key sectors to the Otago Region economy.

Table 8.1 Six key sectors employment in Otago Region

	Year ending March				%pa change	
					2008 to	1999 to
Six key sectors employment (FTEs)	**1999**	**2007**	**2008**	**2009**	***2009***	***2009***
Tourism sector	4,502	6,271	6,007	6,011	*0.1*	*2.9*
Primary production sector	8,845	10,383	10,247	10,389	*1.4*	*1.6*
Primary processing sector	4,880	5,545	5,280	5,359	*1.5*	*0.9*
Creative sector	1,879	2,426	2,361	2,128	*-9.9*	*1.3*
Education & research sector	6,967	8,326	8,270	8,698	*5.2*	*2.2*
Engineering, machinery & equip mfg sector	2,047	2,358	2,377	1,775	*-25.3*	*-1.4*
Total six sectors	**29,119**	**35,309**	**34,543**	**34,360**	***-0.5***	***1.7***
Total employment: Otago Region	**68,939**	**89,664**	**90,440**	**91,130**	***0.8***	***2.8***

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The sectors have seen moderate growth in employment over the last 10 years. Employment in 2009 fell largely as a result of losses in machinery manufacturing although there were also losses in the creative sector.

Table 8.2 presents the recent and longer-term direct contribution of GDP in the six key sectors to the Otago Region economy.

Table 8.2 Six key sectors GDP in Otago Region

	Year ending March				%pa change	
					2008 to	1999 to
Six key sectors GDP (2009$m)	**1999**	**2007**	**2008**	**2009**	***2009***	***2009***
Tourism sector	260	362	360	359	*0.0*	*3.3*
Primary production sector	681	840	858	838	*-2.3*	*2.1*
Primary processing sector	573	791	769	759	*-1.3*	*2.8*
Creative sector	154	203	203	187	*-8.3*	*1.9*
Education & research sector	347	434	431	420	*-2.5*	*1.9*
Engineering, machinery & equip mfg sector	150	185	194	140	*-28.1*	*-0.7*
Total six sectors	**2,164**	**2,814**	**2,815**	**2,703**	***-4.0***	***2.2***
Total GDP: Otago Region	**6,020**	**7,971**	**8,176**	**8,139**	***-0.5***	***3.1***

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Again, the reduction in machinery manufacturing employment played a major role in falling GDP across the six sectors in 2009. Over the decade to 2009, GDP gains have been stronger, up 2.2 percent a year, led by tourism and primary processing.

Table 8.3 presents the recent and longer-term direct contribution of businesses in the six key sectors to the Otago Region economy.

Table 8.3 Six key sectors business units in Otago Region

	Year ending March				*%pa change*	
Six key sectors business units	**1999**	**2007**	**2008**	**2009**	***2008 to 2009***	***1999 to 2009***
Tourism sector	960	1,303	1,315	1,329	*1.1*	*3.3*
Primary production sector	5,410	5,178	5,027	4,913	*-2.3*	*-1.0*
Primary processing sector	206	256	263	254	*-3.4*	*2.1*
Creative sector	473	751	796	776	*-2.5*	*5.1*
Education & research sector	397	413	434	478	*10.1*	*1.9*
Engineering, machinery & equip mfg sector	294	420	431	438	*1.6*	*4.1*
Total six sectors	**7,740**	**8,320**	**8,266**	**8,189**	***-0.9***	***0.6***
Total business units: Otago Region	**18,258**	**25,403**	**26,092**	**26,367**	***1.1***	***3.7***

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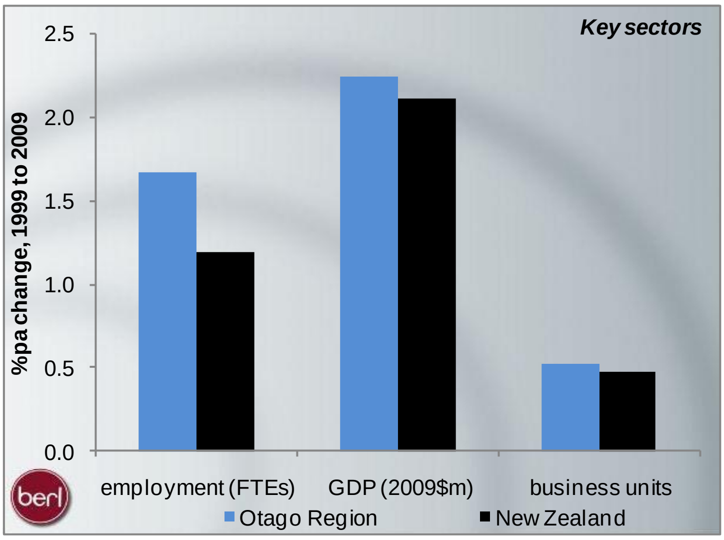
While the total number of businesses in the six key sectors has risen moderately, the detail tells an interesting story. There has been significant consolidation in the primary production sector, with total businesses falling by 500. This is more than the net gain in businesses across the 10 years.

On the other hand, tourism and the creative sector have added 670 businesses between them.

Figure 8.1 shows the change in employment, GDP and business units in the six key sectors in Otago Region and at a national level since 1999.

Figure 8.1 Six key sector growth, Otago Region vs. New Zealand



The Otago Region has seen overall growth in the six key sectors outperform national growth in these sectors across all three measures. The growth in employment is particularly impressive, growing 0.6 percentage points faster per year than the six sectors are nationwide since 1999.

8.1 Tourism sector

The direct contribution of tourism to the Regional economy is calculated using proportions of industry FTEs, GDP and business units that can be directly attributed to tourism, as estimated by the Tourism Satellite Account (TSA).[4]

The contribution of tourism to the local economy comes from three sources: tourism-characteristic industries, such as accommodation, restaurants, transport services, and cultural and recreational services; tourism-related industries, specifically the retail trade; and all other industries, including everything from police services to mining.

Table 8.4 presents the recent and longer-term direct contribution of tourism employment to the Otago Region economy.

Table 8.4 Tourism employment in Otago Region

	Years ended March				*%pa change*	
Tourism employment (FTEs)	**1999**	**2007**	**2008**	**2009**	***2008 to 2009***	***1999 to 2009***
Tourism-characteristic industries	3,257	4,706	4,433	4,422	*-0.3*	*3.1*
Tourism-related industries	811	1,007	1,005	1,016	*1.0*	*2.3*
All non-tourism-related industries	434	558	569	574	*0.9*	*2.8*
Tourism sector	**4,502**	**6,271**	**6,007**	**6,011**	***0.1***	***2.9***
Total employment: Otago Region	**68,939**	**89,664**	**90,440**	**91,130**	***0.8***	***2.8***

BERL, Tourism Satellite Account

The sector directly employs 6.6 percent of Otago region FTEs, the vast bulk of which (74 percent) are in tourism-characteristic industries. A further sixth of FTEs are in tourism-related industries (retail). The slowdown in tourism late in 2008 affected tourism sector employment in the Region badly, leading to very slow growth in 2009. Over the decade the Region's tourism employment has grown at a rate similar to overall employment rises.

Table 8.5 presents the recent and longer-term direct contribution of tourism GDP to the Otago Region economy.

[4] The Tourism Satellite Account provides information about the contribution of tourism to the New Zealand economy. It includes measurement of expenditure on tourism by domestic and international tourists, and the size of the industry, including its contribution to gross domestic product and employment.

Table 8.5 Tourism GDP in Otago Region

Tourism GDP (2009$m)	Years ended March 1999	2007	2008	2009	%pa change 2008 to 2009	1999 to 2009
Tourism-characteristic industries	164	228	223	222	*-0.3*	*3.1*
Tourism-related industries	37	55	56	56	*0.0*	*4.4*
All non-tourism-related industries	59	79	81	81	*0.6*	*3.2*
Tourism sector	**260**	**362**	**360**	**359**	***0.0***	***3.3***
Total GDP: Otago Region	**6,020**	**7,971**	**8,176**	**8,139**	***-0.5***	***3.1***

BERL, Tourism Satellite Account

Tourism directly contributes around $359 million to the Region's GDP, or 4.4 percent of the total. Tourism GDP was flat overall in the latest year, but has grown well since 1999, up 3.3 percent a year, ahead of overall Regional GDP growth.

Table 8.6 presents the recent and longer-term direct contribution of tourism businesses to the Otago Region economy.

Table 8.6 Tourism businesses in Otago Region

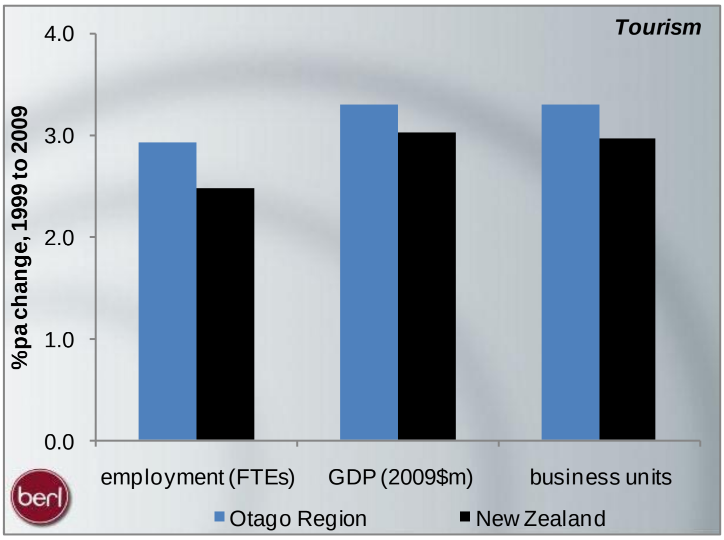
Tourism businesses	Years ended March 1999	2007	2008	2009	%pa change 2008 to 2009	1999 to 2009
Tourism-characteristic industries	650	920	924	935	*1.3*	*3.7*
Tourism-related industries	191	212	216	216	*0.3*	*1.2*
All non-tourism-related industries	119	170	176	178	*1.2*	*4.1*
Tourism sector	**960**	**1,303**	**1,315**	**1,329**	***1.1***	***3.3***
Total business units: Otago Region	**18,258**	**25,403**	**26,092**	**26,367**	***1.1***	***3.7***

BERL, Tourism Satellite Account

The number of business units directly attributable to tourism has risen by 370 units since 1999, or 3.3 percent a year. Growth has varied by component, with non-retail industries showing the strongest gains due to tourism.

Figure 8.2 shows the change in employment, GDP and business units in the tourism sector in Otago Region and at a national level since 1999.

Figure 8.2 Tourism sector growth, Otago Region vs. New Zealand



Led largely by stronger than national growth in Queenstown-Lakes District and Central Otago District, the Otago region tourism sector has enjoyed a strong decade. Growth in the three indicators has averaged between 2.9 percent and 3.3 percent a year.

8.2 Primary production sector

Otago Region's primary production sector is based on standard ANZSIC definitions, and broadly includes agriculture, forestry, fishing, and mining.

Table 8.7 presents the recent and longer-term contribution of primary production sector employment to the Otago Region economy.

Table 8.7 Primary production sector employment in Otago Region

	Year ending March				*%pa change*	
Primary production sector employment (FTEs)	**1999**	**2007**	**2008**	**2009**	***2008 to 2009***	***1999 to 2009***
Agriculture	6,698	7,978	8,005	7,999	*-0.1*	*1.8*
Services to Agriculture; Hunting and Trapping	1,201	1,565	1,386	1,490	*7.5*	*2.2*
Forestry and Logging	390	409	404	396	*-2.0*	*0.1*
Commercial Fishing	135	119	123	138	*12.0*	*0.2*
Mining and services to mining	421	313	330	367	*11.3*	*-1.4*
Primary production sector	**8,845**	**10,383**	**10,247**	**10,389**	***1.4***	***1.6***
Total employment: Otago Region	**68,939**	**89,664**	**90,440**	**91,130**	***0.8***	***2.8***

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Primary production employment grew in 2009 as well as across the decade. Even as employment growth slowed dramatically across the country in 2009, 140 FTEs were added to the sector in Otago. Long-term, growth has been just over half that seen in the Otago economy overall, at 1.6 percent a year. Forestry, fishing, and mining (despite strong recent growth in parts of the sector) have performed poorly, while agriculture and services to agriculture have enjoyed strong gains since 1999.

Table 8.8 presents the recent and longer-term contribution of primary production sector GDP to the Otago Region economy.

Table 8.8 Primary production sector GDP in Otago Region

Primary production sector GDP (2009$m)	Year ending March 1999	2007	2008	2009	%pa change 2008 to 2009	%pa change 1999 to 2009
Agriculture	420	586	577	573	*-0.6*	*3.2*
Services to Agriculture; Hunting and Trapping	55	57	51	49	*-3.8*	*-1.1*
Forestry and Logging	79	128	134	124	*-7.3*	*4.6*
Commercial Fishing	11	9.0	8.5	8.7	*2.9*	*-2.3*
Mining and services to mining	115	59	88	83	*-5.1*	*-3.2*
Primary production sector	**681**	**840**	**858**	**838**	***-2.3***	***2.1***
Total GDP: Otago Region	**6,020**	**7,971**	**8,176**	**8,139**	***-0.5***	***3.1***

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GDP in the sector has grown at 2.1 percent a year since 1999, although it shrank in 2009. Most of the decline in 2009 was in forestry, which accounts for one-seventh of the sector's GDP. Since 1999, results have been mixed across sub-sectors. Fishing and mining have seen GDP fall substantially, while forestry and agriculture have seen strong gains.

Table 8.9 presents the recent and longer-term contribution of primary production sector businesses to the Otago Region economy.

Table 8.9 Primary production sector businesses in Otago Region

Primary production sector business units	Year ending March 1999	2007	2008	2009	%pa change 2008 to 2009	%pa change 1999 to 2009
Agriculture	4,655	4,067	3,925	3,835	*-2.3*	*-1.9*
Services to Agriculture; Hunting and Trapping	265	531	511	515	*0.8*	*6.9*
Forestry and Logging	358	448	461	439	*-4.8*	*2.1*
Commercial Fishing	92	89	87	82	*-5.7*	*-1.1*
Mining and services to mining	40	43	43	42	*-2.3*	*0.5*
Primary production sector	**5,410**	**5,178**	**5,027**	**4,913**	***-2.3***	***-1.0***
Total business units: Otago Region	**18,258**	**25,403**	**26,092**	**26,367**	***1.1***	***3.7***

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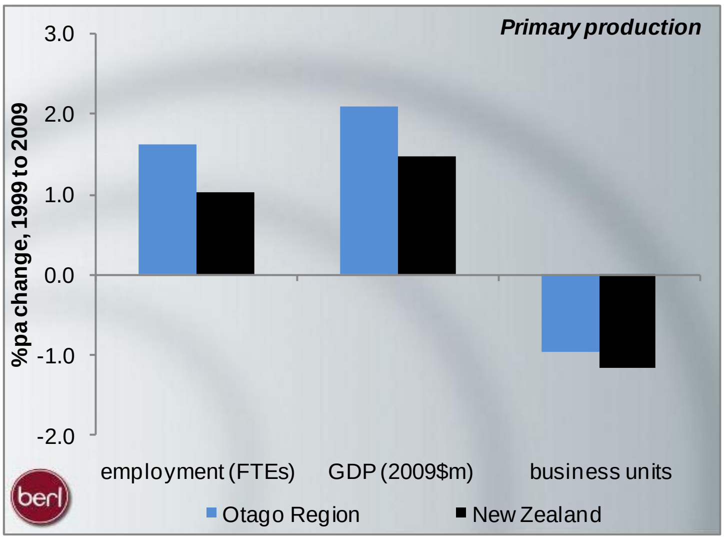
The number of businesses in the sector has declined steadily since 1999, following trends across New Zealand in the sector. The largest falls have been in agriculture and fishing. Services to agriculture, which includes sheep shearing, has seen a strong rise in businesses and employment, possibly as some services have been outsourced by the agriculture industry, or due to classification changes.

Figure 8.3 shows the change in employment, GDP and business units in the primary sector in Otago Region and at a national level since 1999.

Figure 8.3 Primary production sector growth, Otago Region vs. New Zealand



The Region has performed better than New Zealand across all three measures, with rising employment and labour productivity gains leading to strong GDP increases. Business units have declined, but more slowly than nationally, resulting in significantly larger business sizes than 10 years ago (2.1 FTEs per business compared with 1.6 FTEs in 1999).

8.3 Primary processing sector

The Otago Region's primary processing sector is defined as the food and beverage; and the wood and paper product manufacturing industries.

Table 8.10 presents the recent and longer-term contribution of primary processing sector employment to the Otago Region economy.

Table 8.10 Primary processing sector employment in Otago Region

	Year ending March				*%pa change*	
Primary processing sector employment (FTEs)	**1999**	**2007**	**2008**	**2009**	***2008 to 2009***	***1999 to 2009***
Food, Beverage and Tobacco	4,100	4,541	4,355	4,455	*2.3*	*0.8*
Wood and Paper Product Manufacturing	780	1,005	925	904	*-2.2*	*1.5*
Primary processing sector	**4,880**	**5,545**	**5,280**	**5,359**	***1.5***	***0.9***
Total employment: Otago Region	**68,939**	**89,664**	**90,440**	**91,130**	***0.8***	***2.8***

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The food and beverage manufacturing industry is one of the largest in the Region, accounting for 83 percent of primary processing employment, and 4.9 percent of Otago Region employment. Since 1999, food and beverage manufacturing has grown at a modest 0.8 percent a year in the Region. Faster growth in wood and paper product manufacturing has led to an overall growth rate of 0.9 percent a year for the sector.

Table 8.11 presents the recent and longer-term contribution of primary processing sector GDP to the Otago Region economy.

Table 8.11 Primary processing sector GDP in Otago Region

	Year ending March				%pa change	
Primary processing sector GDP (2009$m)	**1999**	**2007**	**2008**	**2009**	***2008 to 2009***	***1999 to 2009***
Food, Beverage and Tobacco	489	657	634	630	*-0.7*	*2.6*
Wood and Paper Product Manufacturing	85	133	135	129	*-4.1*	*4.3*
Primary processing sector	**573**	**791**	**769**	**759**	***-1.3***	***2.8***
Total GDP: Otago Region	**6,020**	**7,971**	**8,176**	**8,139**	***-0.5***	***3.1***

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GDP in the sector has grown at a rate slightly slower than the average for the Region since 1999, expanding across both constituent industries overall, despite recording falls in GDP in recent years

The sector's annual GDP stood at almost $200 million more in 2009 than in 1999. The high labour productivity in the sector means it accounts for 9.3 percent of regional GDP, on 5.9 percent of employment.

Table 8.12 presents the recent and longer-term contribution of primary processing sector businesses to the Otago Region economy.

Table 8.12 Primary processing sector businesses in Otago Region

	Year ending March				%pa change	
Primary processing sector business units	**1999**	**2007**	**2008**	**2009**	***2008 to 2009***	***1999 to 2009***
Food, Beverage and Tobacco	103	135	141	137	*-2.8*	*2.9*
Wood and Paper Product Manufacturing	103	121	122	117	*-4.1*	*1.3*
Primary processing sector	**206**	**256**	**263**	**254**	***-3.4***	***2.1***
Total business units: Otago Region	**18,258**	**25,403**	**26,092**	**26,367**	***1.1***	***3.7***

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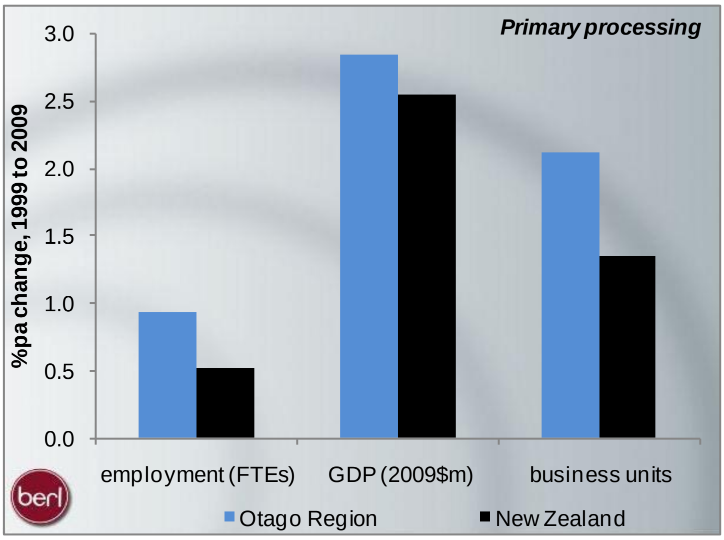
The sector is characterised by large business sizes, with the result that the sector accounts for just 1.0 percent of businesses in the Region. In other words, primary processing businesses are 5.9 times larger than the average Otago Region business.

Since 1999, the number of businesses in the sector has grown, but at around half the rate of business growth seen Regionally.

Figure 8.4 shows the change in employment, GDP and business units in the primary processing sector in Otago Region and at a national level since 1999.

Figure 8.4 Primary processing sector growth, Otago Region vs. New Zealand



The primary processing sector has enjoyed solid growth in Otago since 1999. Employment, GDP and business units have all risen.

8.4 Creative sector

Otago Region's creative sector has been assessed using a list of industries established by the Australian Bureau of Statistics. The broad industries used to define the sector in this report are the printing and publishing; arts and antiques market; commercial services; film, video and television services; and creative arts, studios, and venues industries. More detail on what sub-industries are in these five broad industries is included in the Appendices.

Table 8.13 presents the recent and longer-term contribution of creative sector employment to the Otago Region economy.

Table 8.13 Creative sector employment in Otago Region[5]

	Year ending March				*%pa change*	
Creative sector employment (FTEs)	**1999**	**2007**	**2008**	**2009**	***2008 to 2009***	***1999 to 2009***
Printing and publishing	929	1,149	1,064	1,011	*-4.9*	*0.9*
Arts and antiques market	107	112	120	144	*20.2*	*3.0*
Commercial services	352	528	606	564	*-6.9*	*4.8*
Film, video and television services	297	356	309	206	*-33.4*	*-3.6*
Creative arts, studios and venues	194	282	263	203	*-22.8*	*0.4*
Creative sector	**1,879**	**2,426**	**2,361**	**2,128**	***-9.9***	***1.3***
Total employment: Otago Region	**68,939**	**89,664**	**90,440**	**91,130**	***0.8***	***2.8***

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[5] Note the figure for film, video and television services is not identical to that for motion picture, radio and television services in the appendix because the latter also includes motion picture exhibition (cinemas) and is not within the definition of the creative sector.

Around half the employment in the sector is made up of printing and publishing FTEs. A further quarter is in commercial services such as architecture and advertising services.

Since 1999, the sector has grown moderately, at around half the rate seen across the Regional economy. Around two-thirds of the Region's creative sector capability is based in Dunedin City.

Table 8.14 presents the recent and longer-term contribution of creative sector GDP to the Otago Region economy.

Table 8.14 Creative sector GDP in Otago Region

	Year ending March				%pa change	
Creative sector GDP (2009$m)	**1999**	**2007**	**2008**	**2009**	***2008 to 2009***	***1999 to 2009***
Printing and publishing	82	106	106	101	*-4.5*	*2.2*
Arts and antiques market	4.9	6.0	6.6	7.7	*16.7*	*4.7*
Commercial services	25	36	43	41	*-5.4*	*4.9*
Film, video and television services	34	42	37	28	*-25.5*	*-2.1*
Creative arts, studios and venues	7.9	12	10	9.1	*-12.1*	*1.5*
Creative sector	**154**	**203**	**203**	**187**	***-8.3***	***1.9***
Total GDP: Otago Region	**6,020**	**7,971**	**8,176**	**8,139**	***-0.5***	***3.1***

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Creative sector GDP has grown 1.9 percent a year since 1999, a third below the Region-wide average. The sector had been doing well until the latest year, when GDP fell across most constituent industries. The largest gains since 1999 have been in arts and antiques markets, and in commercial services.

Table 8.15 presents the recent and longer-term contribution of creative sector businesses to the Otago Region economy.

Table 8.15 Creative sector businesses in Otago Region

	Year ending March				%pa change	
Creative sector business units	**1999**	**2007**	**2008**	**2009**	***2008 to 2009***	***1999 to 2009***
Printing and publishing	68	79	70	71	*1.4*	*0.4*
Arts and antiques market	64	67	63	61	*-3.2*	*-0.5*
Commercial services	158	290	322	314	*-2.5*	*7.1*
Film, video and television services	64	128	129	124	*-3.9*	*6.8*
Creative arts, studios and venues	119	187	212	206	*-2.8*	*5.6*
Creative sector	**473**	**751**	**796**	**776**	***-2.5***	***5.1***
Total business units: Otago Region	**18,258**	**25,403**	**26,092**	**26,367**	***1.1***	***3.7***

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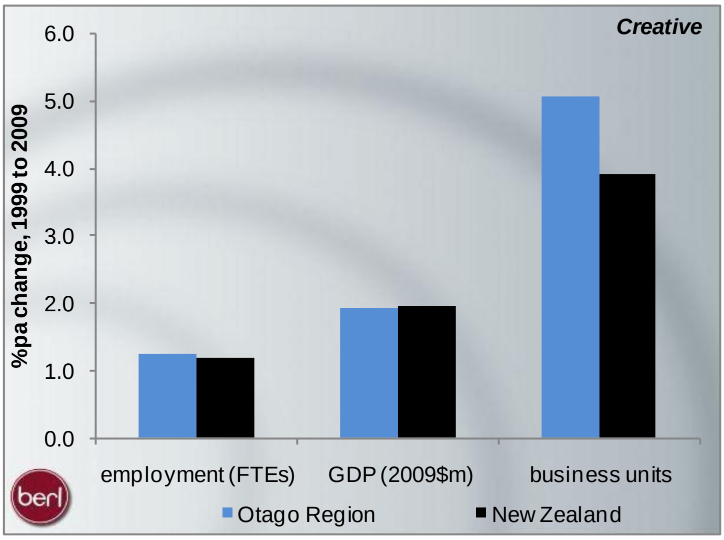
The number of businesses in the sector has surged since 1999, up by more than 300 units. Growth has been in all industries except arts and antiques markets, with commercial services, and film and television services leading the way. Commercial services businesses within the creative sector have virtually doubled over the decade.

Figure 8.5 shows the change in employment, GDP and business units in the creative sector in Otago Region and at a national level since 1999.

Figure 8.5 Creative sector growth, Otago Region vs. New Zealand



Employment and GDP growth in Otago region's creative sector has been broadly in line with national trends, while new businesses have been established at a higher rate. The result has been that the average business size in terms of FTEs and GDP contribution has fallen sharply. For instance, the number of FTEs per business has declined from 4.0 to 2.7 FTEs.

8.5 Education and research sector

Otago Region's education and research sector is based on the Australian New Zealand Standard Industrial Classification (ANZSIC) definition of education and scientific research industries. This definition only includes those organisations whose primary activity is either education or scientific research as opposed to, say, manufacturing. Thus, the ANZSIC definition will not include all related activities such as, for example, R&D taking place in businesses.

Table 8.16 presents the recent and longer-term contribution of education and research sector employment to the Otago Region economy.

Table 8.16 Education and research sector employment in Otago Region

	Year ending March				%pa change	
Education & research sector employment (FTEs)	1999	2007	2008	2009	2008 to 2009	1999 to 2009
Preschool Education	308	380	578	646	*11.6*	*7.7*
Primary and Secondary Education	2,860	2,529	2,334	2,561	*9.7*	*-1.1*
Higher Education	3,104	4,651	4,676	4,782	*2.3*	*4.4*
Other Education	381	393	355	349	*-1.9*	*-0.9*
Scientific Research	314	372	326	360	*10.4*	*1.4*
Education & research sector	**6,967**	**8,326**	**8,270**	**8,698**	***5.2***	***2.2***
Total employment: Otago Region	**68,939**	**89,664**	**90,440**	**91,130**	***0.8***	***2.8***

BERL

Education and research is a growth industry across New Zealand, and Otago Region is no exception. The University of Otago, as well as large primary processing businesses, mean there is plenty of scope for research work. The sector has seen employment grow at 2.2 percent a year over the decade, with particularly strong growth in 2009.

Table 8.17 presents the recent and longer-term contribution of education and research sector GDP to the Otago Region economy.

Table 8.17 Education and research sector GDP in Otago Region

	Year ending March				%pa change	
Education & research sector GDP (2009$m)	1999	2007	2008	2009	2008 to 2009	1999 to 2009
Preschool Education	15	20	30	31	*2.9*	*7.3*
Primary and Secondary Education	140	130	120	121	*1.1*	*-1.4*
Higher Education	151	239	240	226	*-5.8*	*4.1*
Other Education	19	20	18	16	*-9.6*	*-1.2*
Scientific Research	23	26	23	26	*12.2*	*1.4*
Education & research sector	**347**	**434**	**431**	**420**	***-2.5***	***1.9***
Total GDP: Otago Region	**6,020**	**7,971**	**8,176**	**8,139**	***-0.5***	***3.1***

BERL

GDP gains have been more moderate, suggesting that the average labour productivity per FTE has fallen slightly. Nevertheless, GDP is $73 million more per year in 2009 than in 1999.

A quarter of all growth has been in pre-school education, much as a result of the introduction of subsidies for this form of education in 2007.

Table 8.18 presents the recent and longer-term contribution of education and research sector businesses to the Otago Region economy.

Table 8.18 Education and research sector businesses in Otago Region

Education & research sector business units	Year ending March 1999	2007	2008	2009	%pa change 2008 to 2009	1999 to 2009
Preschool Education	117	120	127	129	*1.6*	*1.0*
Primary and Secondary Education	179	166	165	161	*-2.4*	*-1.1*
Higher Education	13	15	17	18	*5.9*	*3.3*
Other Education	92	110	120	133	*10.8*	*3.8*
Scientific Research	24	35	38	37	*-2.6*	*4.4*
Education & research sector	**425**	**446**	**467**	**478**	***2.4***	***1.2***
Total business units: Otago Region	**18,258**	**25,403**	**26,092**	**26,367**	***1.1***	***3.7***

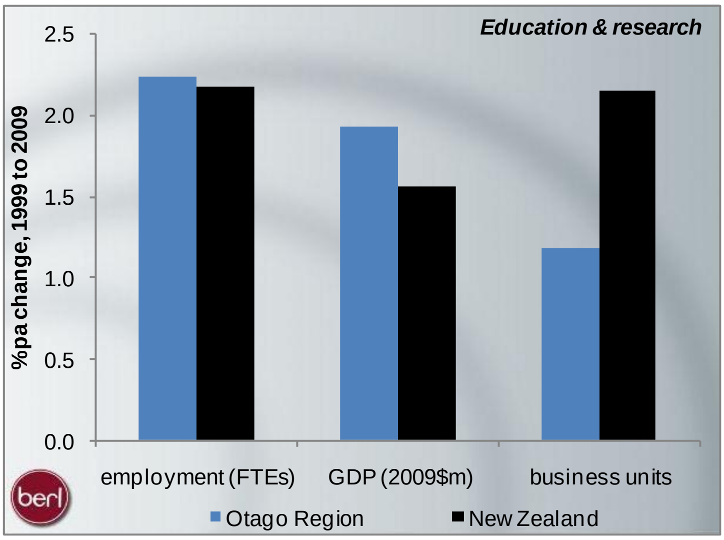
BERL

The number of businesses in the sector has remained relatively stable over the decade, up just 53. Most of the growth has been in private sector research organisations and in other education, which includes private training establishments of various kinds.

Notable for this report, which highlights the difficulties several local economies have with falling populations, is the drop in the number of units engaged in primary and secondary education.

Figure 8.6 shows the change in employment, GDP and business units in the education and research sector in Otago Region and at a national level since 1999.

Figure 8.6 Education and research sector growth, Otago Region vs. New Zealand



Employment and GDP contributed by education and research organisations in Otago Region have grown strongly since 1999. Business units are also up, but at a more moderate pace. As employment has grown rapidly, GDP has not quite kept up, meaning a fall in labour productivity in the sector.

8.6 Engineering, and machinery and equipment manufacturing

Otago Region's engineering sector is based on the ANZSIC industries of consultant engineering services, and machinery and equipment manufacturing.

Table 8.19 presents the recent and longer-term contribution of engineering, and machinery and equipment manufacturing sector employment to the Otago Region economy.

Table 8.19 Engineering, and machinery and equipment manufacturing sector employment in Otago Region

	Year ending March				%pa change	
Engineering, machinery & equip mfg sector employment (FTEs)	**1999**	**2007**	**2008**	**2009**	***2008 to 2009***	***1999 to 2009***
Machinery and Equipment Manufacturing	1,653	1,754	1,761	1,208	*-31.4*	*-3.1*
Consultant Engineering Services	394	604	616	567	*-8.0*	*3.7*
Engineering, machinery & equip mfg sector	**2,047**	**2,358**	**2,377**	**1,775**	***-25.3***	***-1.4***
Total employment: Otago Region	**68,939**	**89,664**	**90,440**	**91,130**	***0.8***	***2.8***

BERL

The sector suffered major job losses in 2009 with the reduction in operations at the Fisher and Paykel factory. These losses singlehandedly outweighed all the gains in employment in the sector since 1999. The net result is that the sector has recorded an average decline in employment of 1.4 percent a year since 1999, compared with 2.8 percent a year growth for the Region overall, despite net recording positive growth until 2008.

Table 8.20 presents the recent and longer-term contribution of engineering, and machinery and equipment manufacturing sector GDP to the Otago Region economy.

Table 8.20 Engineering, and machinery and equipment manufacturing sector GDP in Otago Region

	Year ending March				%pa change	
Engineering, machinery & equip mfg sector GDP (2009$m)	**1999**	**2007**	**2008**	**2009**	***2008 to 2009***	***1999 to 2009***
Machinery and Equipment Manufacturing	121	143	151	99	*-34.4*	*-2.0*
Consultant Engineering Services	28	42	44	41	*-6.5*	*3.8*
Engineering, machinery & equip mfg sector	**150**	**185**	**194**	**140**	***-28.1***	***-0.7***
Total GDP: Otago Region	**6,020**	**7,971**	**8,176**	**8,139**	***-0.5***	***3.1***

BERL

The drop in employment has flowed through to GDP, which plummeted 28 percent in 2009. The moderate gains seen in previous years were reversed, resulting in a decline of 0.7 percent a year on average in sector GDP.

On a more positive note, with the exception of the last year, consultant engineering services has seen solid gains, up 3.8 percent a year since 1999.

Table 8.21 presents the recent and longer-term contribution of engineering, and machinery and equipment manufacturing sector businesses to the Otago Region economy.

Table 8.21 Engineering, and machinery and equipment manufacturing sector businesses in Otago Region

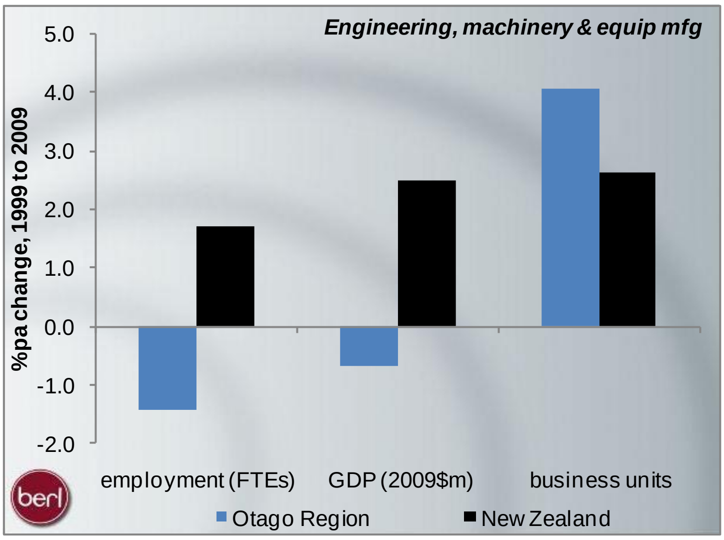
Engineering, machinery & equip mfg sector business units	Year ending March 1999	2007	2008	2009	%pa change 2008 to 2009	1999 to 2009
Machinery and Equipment Manufacturing	192	232	236	246	*4.2*	*2.5*
Consultant Engineering Services	102	188	195	192	*-1.5*	*6.5*
Engineering, machinery & equip mfg sector	**294**	**420**	**431**	**438**	***1.6***	***4.1***
Total business units: Otago Region	**18,258**	**25,403**	**26,092**	**26,367**	***1.1***	***3.7***

BERL

The number of businesses in the sector has increased solidly, even as employment has fallen. Business numbers in consultant engineering services have almost doubled in the last 10 years, supported by the construction boom, which encouraged many to set up their own businesses.

Figure 8.7 shows the change in employment, GDP and business units in the engineering, and machinery and equipment manufacturing sector in Otago Region and at a national level since 1999.

Figure 8.7 Engineering, and machinery and equipment manufacturing sector growth, Otago Region vs. New Zealand



The sector has seen employment fall significantly, but this is almost exclusively the result of a sharp fall in 2009. Employment has shrunk by 1.4 percent a year. GDP is down more moderately, at 0.7 percent a year, suggesting labour productivity gains. The number of business units has surged, however, precipitating a large fall in average business size, from 7.0 FTEs in 1999 to 4.1 FTEs in 2009.

9 Central Otago District

- The Central Otago District, on the whole, weathered out the global economic slowdown well. It experienced strong output, employment and population growth during 2009.

- The wine industry and its related service industries are becoming substantial drivers in the Central Otago District's economy. Employment in the direct wine-related industries climbed to almost 6 percent of the District's employment in 2009.

- Service industries are becoming increasingly important in the District's economy. Six of the top ten fastest growing industries in 2009, by employment, were service industries.

Table 9.1 shows the composition of the Central Otago economy as of 2009, and its role in the regional and national economies.

Table 9.1 Composition of the Central Otago economy, 2009

Sector (2009)	FTEs	*% of TLA*	*% of Otago*	*% of NZ*	GDP (09$m)	*% of TLA*	*% of Otago*	*% of NZ*	Bus. units	*% of TLA*	*% of Otago*	*% of NZ*
Primary	2,798	*29.8%*	*26.9%*	*1.8%*	187	*23.6%*	*22.3%*	*1.4%*	978	*30.0%*	*19.9%*	*1.3%*
Manufacturing	492	*5.2%*	*4.8%*	*0.2%*	60	*7.6%*	*5.0%*	*0.2%*	128	*3.9%*	*13.2%*	*0.5%*
Construction	1,197	*12.7%*	*14.6%*	*0.8%*	69	*8.7%*	*14.9%*	*0.8%*	372	*11.4%*	*13.0%*	*0.7%*
Retail and Distribution	2,099	*22.3%*	*8.8%*	*0.4%*	133	*16.9%*	*8.4%*	*0.4%*	531	*16.3%*	*10.4%*	*0.5%*
Business Services	1,462	*15.6%*	*10.8%*	*0.4%*	260	*32.9%*	*10.1%*	*0.4%*	941	*28.9%*	*10.4%*	*0.5%*
Recreation Services	346	*3.7%*	*5.8%*	*0.3%*	17	*2.2%*	*5.5%*	*0.3%*	172	*5.3%*	*9.3%*	*0.5%*
Social Services	1,000	*10.6%*	*5.3%*	*0.3%*	63	*8.0%*	*5.5%*	*0.2%*	136	*4.2%*	*8.4%*	*0.4%*
Totals	**9,394**	***100.0%***	***10.3%***	***0.5%***	**790**	***100.0%***	***9.7%***	***0.4%***	**3,258**	***100.0%***	***12.4%***	***0.6%***

BERL

Central Otago is a primary-based district, as clearly shown by the share of employment, GDP and business units in the sector. The District also accounts for more than a quarter of regional primary employment, and large shares of primary GDP and business units.

Table 9.2 presents the performance of the Central Otago District across seven key performance indicators (KPIs) for the latest year, and compares this performance with that of the Otago Region and New Zealand.

Table 9.2 KPIs, Central Otago District, 2009

Key Performance Indicators	%pa for 2009 year		
	Central Otago District	Otago Region	New Zealand
Resident population growth	**1.4**	0.8	1.1
Real Value Added (GDP) growth	**6.0**	-0.5	-1.1
GDP per capita growth	**4.5**	-1.3	-2.2
Employment growth	**6.9**	0.8	0.7
Labour productivity growth	**-1.0**	-1.4	-1.9
Business units growth	**1.7**	1.1	0.3
Business size growth	**5.1**	-0.3	0.3

Source: BERL, Statistics NZ

The District experienced strong output, employment and population growth during 2009, exceeding the Regional average, and defying the national recession.

The BERL regional database collates data across seven KPIs over a 10-year period. These seven KPIs are listed in Table 9.3, which presents Central Otago District's performance over the decade compared to the Otago Region and New Zealand as a whole.

Table 9.3 KPIs, Central Otago District, 1999 to 2009

Key Performance Indicators	%pa for 1999-2009		
	Central Otago District	Otago Region	New Zealand
Resident population growth	**2.0**	1.0	1.2
Real Value Added (GDP) growth	**4.1**	3.1	3.1
GDP per capita growth	**2.0**	2.1	1.8
Employment growth	**4.8**	2.8	2.4
Productivity growth	**-0.5**	0.4	0.8
Business units growth	**3.8**	3.7	3.0
Business size growth	**0.9**	-0.9	-0.6

Source: BERL, Statistics NZ

The Central Otago District performed considerably better than New Zealand across most of the KPIs. The District's population continued to grow faster than the national rate. In combination with above average GDP growth, GDP per capita grew ahead of the national average.

The District did not perform well in terms of productivity, which dropped by 0.5 percent a year in a national environment of moderate growth. The number of business units grew strongly across the District and Region, however.

9.1 Employment

Table 9.4 shows employment numbers for the Central Otago District for the last three periods and the longer term. It also shows the aggregate change over the same period for New Zealand and the Otago Region.

Table 9.4 Central Otago District employment summary

	Employment Number FTEs				%pa change		
Sector	**1999**	**2007**	**2008**	**2009**	**2007 to 2008**	**2008 to 2009**	**1999 to 2009**
Primary	1,988	2,690	2,658	2,798	-1.2	5.3	3.5
Manufacturing	390	387	437	492	13.1	12.5	2.4
Construction	521	1,078	1,231	1,197	14.2	-2.8	8.7
Retail and Distribution	1,401	1,966	2,017	2,099	2.6	4.1	4.1
Business Services	665	1,027	1,263	1,462	22.9	15.8	8.2
Recreation Services	173	286	328	346	14.5	5.5	7.2
Social Services	756	817	856	1,000	4.8	16.8	2.8
Central Otago District	**5,894**	**8,251**	**8,790**	**9,394**	**6.5**	**6.9**	**4.8**
Otago Region	**68,939**	**89,664**	**90,440**	**91,130**	**0.9**	**0.8**	**2.8**
New Zealand	**1,473,526**	**1,840,284**	**1,854,636**	**1,866,747**	**0.8**	**0.7**	**2.4**

Source: BERL, Statistics NZ

Central Otago continued to rapidly expand its labour market, continuing several years of high growth. It added over 600 FTEs in the year, or a 6.9 percent rise in 2009.[6] This rate puts the District's labour market well ahead of the insipid national labour market.

Although employment in the District's primary sector grew modestly over 2009, the grape growing industry performed very well. Grape growing added more than 60 FTEs, which is an increase of almost 20 percent over the previous year. This industry was responsible for one tenth of the District's net employment increase.

The manufacturing sector also benefitted from the wine industry's expansion, adding over 50 FTEs in wine manufacturing. Cake and pastry manufacturing is a relatively new industry in the District, but has grown to have over 30 FTEs in the past few years.

[6] We have some reservations about this figure. Over one third of the net FTE increase was due to a change in the Contract Staff Services industry. This industry is prone to reporting error, and the rise from 0 FTEs in 2007 (and prior) to 275 in 2008 and 488 in 2009 suggests it should be viewed with caution.

Reflecting the housing market malaise across the country, employment housing and residential construction contracted, but non-residential building and site preparation employment rose slightly.

Expanding health and residential services, especially for the elderly, led the increase in social services employment.

9.2 GDP

Table 9.5 describes the GDP for the Central Otago District, and compares its performance to that of New Zealand and the Otago Region.

Table 9.5 Central Otago District GDP summary

	Value Added or GDP (2009$m)				%pa change		
Sector	**1999**	**2007**	**2008**	**2009**	**2007 to 2008**	**2008 to 2009**	**1999 to 2009**
Primary	124	183	184	187	0.5	1.7	4.1
Manufacturing	41	47	54	60	15.4	11.1	3.8
Construction	29	64	74	69	16.3	-6.9	9.1
Retail and Distribution	79	122	131	133	7.1	2.1	5.3
Business Services	197	225	229	260	1.9	13.6	2.8
Recreation Services	9	15	17	17	12.8	3.6	6.3
Social Services	50	54	57	63	6.0	11.3	2.5
Central Otago District	**530**	**709**	**745**	**790**	**5.2**	**6.0**	**4.1**
Otago Region	**6,020**	**7,971**	**8,176**	**8,139**	**2.6**	**-0.5**	**3.1**
New Zealand	**136,841**	**181,968**	**187,651**	**185,554**	**3.1**	**-1.1**	**3.1**

Source: BERL, Statistics NZ

Central Otago's GDP increased by 6.0 percent over 2008/09 to $790 million. This is a remarkable result, given that it is faster than its previous year's growth of 5.2 percent and during a national recession.

The District's largest and fastest growing contributor to value added was the business services sector, which along with the primary and retail and distribution sectors, accounts for almost three quarters of the District's total GDP.

Construction was the only sector to see a contraction in GDP in 2008/09.

9.2.1 Labour productivity

Table 9.6 presents the changes in labour productivity for the Central Otago District's sectors for the last 10 years, along with a national and Regional comparison.

Table 9.6 Central Otago District labour productivity summary

Sector	Productivity (2009$ per FTE)				%pa change		
	1999	2007	2008	2009	2007 to 2008	2008 to 2009	1999 to 2009
Primary	62,600	67,910	69,094	66,731	1.7	-3.4	0.6
Manufacturing	105,891	121,057	123,562	122,026	2.1	-1.2	1.4
Construction	55,224	59,118	60,220	57,650	1.9	-4.3	0.4
Retail and Distribution	56,648	62,065	64,764	63,534	4.3	-1.9	1.2
Business Services (#)	229,893	172,094	142,028	141,082	-17.5	-0.7	-4.8
Recreation Services	54,729	52,273	51,490	50,572	-1.5	-1.8	-0.8
Social Services	65,643	65,741	66,504	63,372	1.2	-4.7	-0.4
Central Otago District (#)	**82,432**	**80,077**	**79,138**	**78,375**	**-1.2**	**-1.0**	**-0.5**
Otago Region (#)	**80,092**	**82,863**	**84,365**	**83,210**	**1.8**	**-1.4**	**0.4**
New Zealand (#)	**85,181**	**92,168**	**94,419**	**92,607**	**2.4**	**-1.9**	**0.8**

 # excl owner-occupied dwellings sector

Source: BERL, Statistics NZ

The Central Otago District's average labour productivity continued to sit below the Otago Region and New Zealand average levels. At $78,400, it was 94 percent of the regional level and 85 percent of the national level. However, it showed some resilience during 2009, falling less quickly than either the Region or national levels.

All sectors saw productivity declines in the latest year, with the largest falls coming in the growing primary (-3.4 percent) and social services (-4.7 percent) sectors and the contracting construction sector (-4.3 percent).

The District's productivity decline in 2009 of -1.0 percent was worse than its long term average of -0.5 percent over the last decade. However, the business services sector experienced a smaller decline in 2009 (-0.8 percent) than its long term average (-4.8 percent).

9.3 Business units and size

Table 9.7 shows the change in number of businesses within each sector in the Central Otago District over the last 10 years. It also shows overall national and Regional business unit growth.

Table 9.7 Central Otago District business units summary

	Business Units (number)				%pa change		
Sector	1999	2007	2008	2009	2007 to 2008	2008 to 2009	1999 to 2009
Primary	1,057	1,008	990	978	-1.8	-1.2	-0.8
Manufacturing	75	116	126	128	8.6	1.6	5.5
Construction	163	325	373	372	14.8	-0.3	8.6
Retail and Distribution	378	507	510	531	0.6	4.1	3.5
Business Services	334	816	911	941	11.6	3.3	10.9
Recreation Services	117	167	160	172	-4.2	7.5	3.9
Social Services	109	125	134	136	7.2	1.5	2.2
Central Otago District	**2,233**	**3,064**	**3,204**	**3,258**	**4.6**	**1.7**	**3.8**
Otago Region	**18,258**	**25,403**	**26,092**	**26,367**	**2.7**	**1.1**	**3.7**
New Zealand	**379,701**	**500,728**	**511,030**	**512,580**	**2.1**	**0.3**	**3.0**

Source: BERL, Statistics NZ

The Primary sector remains the largest sector in terms of number of businesses, although the numbers continue to decline. As the business services sector continues to grow, it has drawn into a close second place. It is likely that within the next year or so that the business services sector will take the lead position.

The growth in the number of businesses slowed in the latest year to 1.7 percent, sitting at about half its long term average rate (3.8 percent). However, given the District's substantial output and employment growth, it is likely that the national economic recovery, although still somewhat fragile, will provide further confidence to the District and support business expansion.

9.3.1 Business size

Table 9.8 shows the changes in average business size at the seven sector level and the District level for Central Otago, compared with national and Regional trends.

Table 9.8 Central Otago District business size summary

	Business Size (FTEs per unit)				%pa change		
Sector	1999	2007	2008	2009	2007 to 2008	2008 to 2009	1999 to 2009
Primary	1.9	2.7	2.7	2.9	0.6	6.6	4.3
Manufacturing	5.2	3.3	3.5	3.8	4.1	10.7	-3.0
Construction	3.2	3.3	3.3	3.2	-0.5	-2.5	0.1
Retail and Distribution	3.7	3.9	4.0	4.0	2.0	-0.1	0.6
Business Services	2.0	1.3	1.4	1.6	10.1	12.1	-2.4
Recreation Services	1.5	1.7	2.0	2.0	19.5	-1.9	3.1
Social Services	6.9	6.5	6.4	7.4	-2.2	15.1	0.6
Central Otago District	**2.6**	**2.7**	**2.7**	**2.9**	**1.9**	**5.1**	**0.9**
Otago Region	**3.8**	**3.5**	**3.5**	**3.5**	**-1.8**	**-0.2**	**-0.9**
New Zealand	**3.9**	**3.7**	**3.6**	**3.6**	**-1.3**	**0.4**	**-0.6**

Source: BERL, Statistics NZ

Despite the smaller size of Central Otago's businesses relative to the Regional and national average (3.5 and 3.6 FTEs per business), the District's business have been increasing their scale. Both the manufacturing and business services sectors saw noticeable increases in both the last two years. Reflecting the difficult times for the construction sector, construction companies scaled down their employment slightly, on average by 0.2 FTEs.

9.4 Fastest-growing industries

Industries are compared at the 53-industry level. The analysis only covers industries that have over 25 FTEs and, for GDP, those industries earning over $2.25 million.

9.4.1 Employment

Table 9.9 presents the ten industries with the fastest growth trend in Central Otago District by FTE employment in the three years to March 2009.

Table 9.9 Ten fastest growing industries by FTE growth, 2006 to 2009

Rank by FTE growth	Industry	FTEs				%pa growth	
		2006	2007	2008	2009	2008 to 2009	2006 to 2009
1	Textile, Clothing, Footwear & Leather Mfg	11	25	40	40	0.5	54.1
2	Business Services	569	654	931	1,091	17.2	24.2
3	Other Services	83	90	106	117	9.7	11.9
4	Sport and Recreation	70	79	93	95	2.4	10.8
5	Agriculture	1,674	2,108	2,176	2,243	3.1	10.3
6	Road Transport	207	192	234	272	16.6	9.6
7	Personal and Household Good Wholesaling	89	112	110	115	4.7	9.0
8	Community Services	124	140	134	158	17.7	8.4
9	Education	300	316	341	380	11.5	8.2
10	Government Administration	84	74	93	106	14.6	8.1

Source: BERL, Statistics NZ

The textile, clothing, footwear and leather manufacturing industry had the District's fastest growth trend between 2006 and 2009. It added almost 30 FTEs, which is equivalent to more than 50 percent per annum. However, the majority of this growth was between 2006/07 and 2007/08, with employment stabilising in the last year. This stabilisation may reflect the impact of the general economic slowdown on this sector, so its expansion may continue as the economy comes out of the recession over 2010.

Business services has added over 500 FTEs since 2006 and 160 FTEs in the last year. The three year trend growth rate was almost 25 percent, and the change in the last year alone was equivalent to increasing its workforce by more than one sixth.

The agricultural sector also added more than 500 FTEs since 2006, which is equivalent to a 10.3 percent annual average growth rate.

The fastest growing industry in the year to 2009 was the Food, Beverage and Tobacco industry. This was primarily driven by the expansion in employment in grape growing, which added 62 FTEs. But this increase comes after a substantial decline in 2006/07 following the closure of a small goods manufacturer, which conceals the increasing trend in this industry over the past few years related to grape growing.

9.4.2 GDP

Table 9.10 presents the ten fastest growing industries by GDP growth in the three years to March 2009.

Table 9.10 Ten fastest growing industries by GDP

Rank by GDP growth	Industry	GDP (2009$m)				%pa growth	
		2006	2007	2008	2009	2008 to 2009	2006 to 2009
1	Textile, Clothing, Footwear & Leather Mfg	0.7	1.7	2.9	2.8	-3.9	61.6
2	Other Mining	1.4	2.4	4.7	2.9	-37.5	29.0
3	Business Services	40	45	66	79	19.1	25.5
4	Insurance	1.5	1.4	1.5	2.3	49.1	15.3
5	Services to Finance and Insurance	1.8	2.0	1.6	2.6	63.7	12.7
6	Road Transport	18	16	21	24	14.0	10.2
7	Agriculture	121	155	157	161	2.5	9.8
8	Other Services	2.5	2.7	3.2	3.2	1.8	9.7
9	Sport and Recreation	4.9	5.6	6.3	6.3	1.0	9.2
10	Personal and Household Good Wholesaling	11	13	13	14	1.3	9.0

Source: BERL, Statistics NZ

As with the employment picture above, the textile, clothing, footwear and leather manufacturing industry had the District's fastest growth trend between 2006 and 2009. However, this industry experienced a fall in output over the last year. This reinforces the picture of this industry suffering a slowdown related to the general economic recession, as falls in employment tend to lag falls in output during a recession.

A further two industries had output growth of above 20 percent per annum on average over the past three years: other mining and business services.

Although modest in employment terms in the District, the Insurance industry and insurance and services to finance industries had above average output per FTE and delivered high GDP growth in relative terms.

In addition to its high employment growth, the food, beverage and tobacco industry increased its output by almost half again (44.6 percent) compared to what it produced in 2008.

The top ten fastest growing industries by GDP over the past year also included a number of service industries, including communication services, personal services, health services, business services and property services. Growth in this group ranged from 27.2 percent down to 15.9 percent.

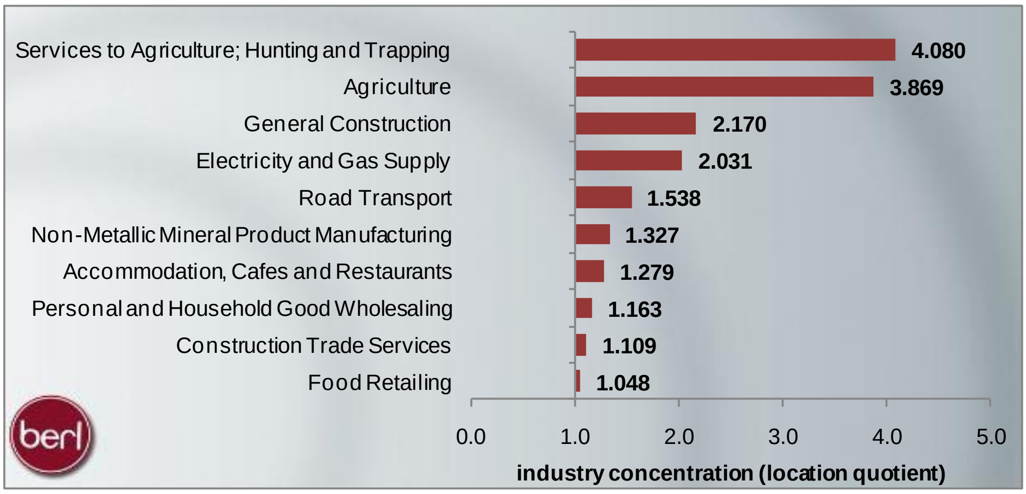
9.5 Location quotients

This section looks at the concentration of industries in Central Otago District compared to the national average. Again the analysis is at the 53-industry level.

When the ratio is larger than 1.0 the percentage of the employed in the industry locally is higher than the percentage of the employed in the larger area. Likewise, when the ratio is smaller than 1.0 the percentage of people employed in this industry locally is smaller than the larger area.

Figure 9.1 shows the ten industries with the highest location quotients. Because of the small numbers in some industries in Central Otago District, we only compare those industries that have at least 25 FTEs.[7]

Figure 9.1 Ten industries with the highest FTE location quotients



A high proportion of Central Otago employment is in the Primary sector. Employment in services to agriculture in Central Otago is 4.1 times higher than the average employment nationally in services to agriculture. The ratio is 3.9 times as high in the agriculture industry in the District as nationally. Other industries with high location quotients are road transport (1.5); other transport (2.5); and accommodation, cafes and restaurants (1.3).

Figure 9.2 shows the ten industries with the lowest location quotients in the Central Otago District. In other words, these industries, while they have some representation in the District,

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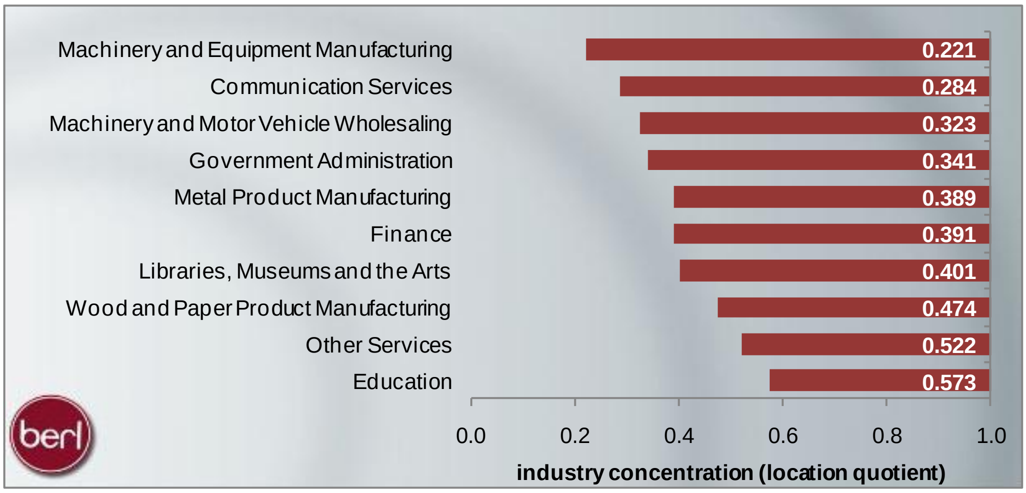
[7] Thirty-one industries in Central Otago employ over 25 FTEs. Five industries do not have a presence in Central Otago– coal mining; oil and gas exploration; rail transport; water transport; and private households employing staff.

are ones in which workers at a national level are far more likely to be employed than in the District.

Figure 9.2 Ten industries with the lowest FTE location quotients



The low location quotients reinforce the picture of Central Otago's land based, rural industry pattern, with workers less likely to work in finance; manufacturing industries; and social services such as government or education.

9.6 Key sectors in the District

This chapter summarises the performance of six key sectors highlighted in the Economic Development Strategy for the Otago Region, and in our analysis of major employers in the District. The performance of each sector is assessed in terms of changes in employment, GDP, and business units. It also summarises the recent performance of the horticulture and viticulture sectors.

9.6.1 Tourism sector

Table 9.11 presents a range of tourism data for 2004 to 2009 taken from the Tourism Research Council's Commercial Accommodation Monitor, for years ended October. This data is six months more recent than the Statistics New Zealand data used in the rest of this report.

Table 9.11. Tourism sector indicators

Central Otago	Year ending October				% change 08 to 09	
	2004	2007	2008	2009	Central Otago	New Zealand
Establishments	50	53	55	56	1.8%	1.0%
Annual capacity (000s)	1,012	1,056	1,054	1,082	2.6%	2.2%
Stay unit nights (000s)	133	170	172	168	-2.3%	-2.4%
Guest nights (000s)	257	324	333	332	-0.3%	-3.6%
Occupancy rate	13.1585	16.1113	16.3219	15.538	-4.8%	-4.5%

Source: Commercial Accommodation Monitor

In the year to October 2009, the Central Otago District had an increase in establishments and capacity. However, consistent with the tough year in the tourism market across the country, guest nights and occupancy rates were down. The District outperformed New Zealand on all indicators apart from occupancy rate, which fell by a substantial proportion for both the District and the country as a whole.

Table 9.12 presents the recent and longer-term direct contribution of tourism employment to the Central Otago District economy.

Table 9.12 Tourism employment in Central Otago District

	Years ended March				%pa change	
Tourism employment (FTEs)	**1999**	**2007**	**2008**	**2009**	***2008 to 2009***	***1999 to 2009***
Tourism-characteristic industries	184	298	316	307	*-2.8*	*5.3*
Tourism-related industries	70	84	84	86	*3.4*	*2.1*
All non-tourism-related industries	39	55	59	64	*8.4*	*5.0*
Tourism sector	**293**	**438**	**459**	**458**	***-0.2***	***4.5***
Total employment: Central Otago District	**5,894**	**8,251**	**8,790**	**9,394**	***6.9***	***4.8***

BERL, Tourism Satellite Account

Table 9.13 presents the recent and longer-term direct contribution of tourism GDP to the Central Otago District economy.

Table 9.13 Tourism GDP in Central Otago District

	Years ended March				%pa change	
Tourism GDP (2009$m)	**1999**	**2007**	**2008**	**2009**	***2008 to 2009***	***1999 to 2009***
Tourism-characteristic industries	7.4	11.4	11.6	11.4	*-1.3*	*4.4*
Tourism-related industries	3.2	4.6	4.8	4.8	*0.0*	*4.2*
All non-tourism-related industries	4.5	5.4	6.7	6.8	*0.6*	*4.2*
Tourism sector	**15.1**	**21.5**	**23.1**	**23.0**	***-0.5***	***4.3***
Total GDP: Central Otago District	**530**	**709**	**745**	**790**	***6.0***	***4.1***

BERL, Tourism Satellite Account

Table 9.14 presents the recent and longer-term direct contribution of tourism businesses to the Central Otago District economy.

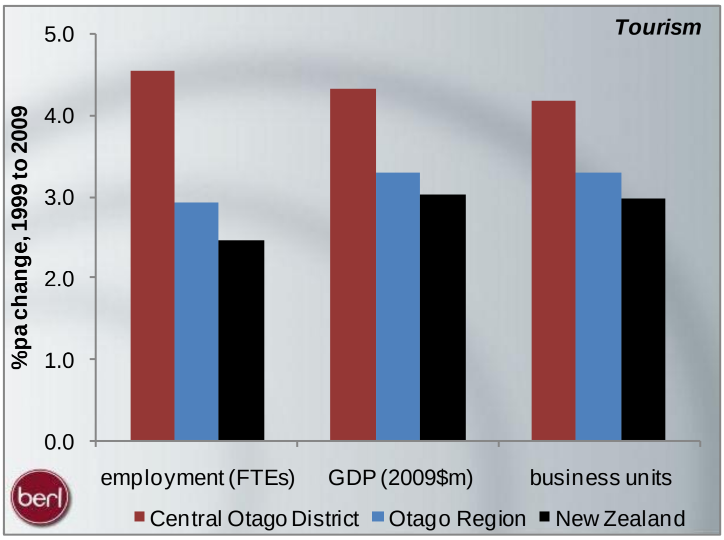
Table 9.14 Tourism businesses in Central Otago District

Tourism businesses	Years ended March 1999	2007	2008	2009	%pa change 2008 to 2009	1999 to 2009
Tourism-characteristic industries	60	88	89	94	*6.6*	*4.7*
Tourism-related industries	17	22	22	22	*2.6*	*2.5*
All non-tourism-related industries	16	21	23	23	*1.2*	*3.9*
Tourism sector	**93**	**131**	**133**	**140**	***5.0***	***4.2***
Total business units: Central Otago District	**2,233**	**3,064**	**3,204**	**3,258**	***1.7***	***3.8***

BERL, Tourism Satellite Account

Figure 9.3 shows the change in employment, GDP and business units in the tourism sector in Central Otago District and at a regional and national level over the last 10 years.

Figure 9.3 Tourism sector growth, Central Otago District, Otago Region, New Zealand



Despite difficult conditions for the national tourism market, Central Otago saw substantial positive increases in all three growth indicators in 2009. This continues a 10 year trend, as shown in Figure 9.3, with the District averaging between 4.2 and 4.5 percent a year across the three indicators.

9.6.2 Primary production sector

Table 9.15 presents the recent and longer-term direct contribution of primary production employment to the Central Otago District economy.

Table 9.15 Primary production employment in Central Otago District

Primary production sector employment (FTEs)	Year ending March 1999	2007	2008	2009	%pa change 2008 to 2009	1999 to 2009
Agriculture	1,506	2,108	2,176	2,243	*3.1*	*4.1*
Services to Agriculture; Hunting and Trapping	443	545	441	520	*17.7*	*1.6*
Forestry and Logging	18	14	14	15	*9.0*	*-1.6*
Commercial Fishing	0	3	3	3	*3.4*	*na*
Mining and services to mining	21	19	24	17	*-28.7*	*-2.0*
Primary production sector	**1,988**	**2,690**	**2,658**	**2,798**	***5.3***	***3.5***
Total employment: Central Otago District	**5,894**	**8,251**	**8,790**	**9,394**	***6.9***	***4.8***

BERL

Table 9.16 presents the recent and longer-term direct contribution of primary production GDP to the Central Otago District economy.

Table 9.16 Primary production GDP in Central Otago District

Primary production sector GDP (2009$m)	Year ending March 1999	2007	2008	2009	%pa change 2008 to 2009	1999 to 2009
Agriculture	94	155	157	161	*2.5*	*5.5*
Services to Agriculture; Hunting and Trapping	20	20	16	17	*5.4*	*-1.6*
Forestry and Logging	4	5	5	5	*3.1*	*2.8*
Commercial Fishing	0	0	0	0	*-5.0*	*na*
Mining and services to mining	6	3	6	4	*-33.2*	*-4.4*
Primary production sector	**124**	**183**	**184**	**187**	***1.7***	***4.1***
Total GDP: Central Otago District	**530**	**709**	**745**	**790**	***6.0***	***4.1***

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Table 9.17 presents the recent and longer-term direct contribution of primary production businesses to the Central Otago District economy.

Table 9.17 Primary production businesses in Central Otago District

Primary production sector business units	Year ending March 1999	2007	2008	2009	%pa change 2008 to 2009	1999 to 2009
Agriculture	938	843	832	820	*-1.4*	*-1.3*
Services to Agriculture; Hunting and Trapping	88	126	118	122	*3.4*	*3.3*
Forestry and Logging	24	31	30	25	*-16.7*	*0.4*
Commercial Fishing	0	1	4	4	*0.0*	*na*
Mining and services to mining	7	7	6	7	*16.7*	*0.0*
Primary production sector	**1,057**	**1,008**	**990**	**978**	***-1.2***	***-0.8***
Total business units: Central Otago District	**2,233**	**3,064**	**3,204**	**3,258**	***1.7***	***3.8***

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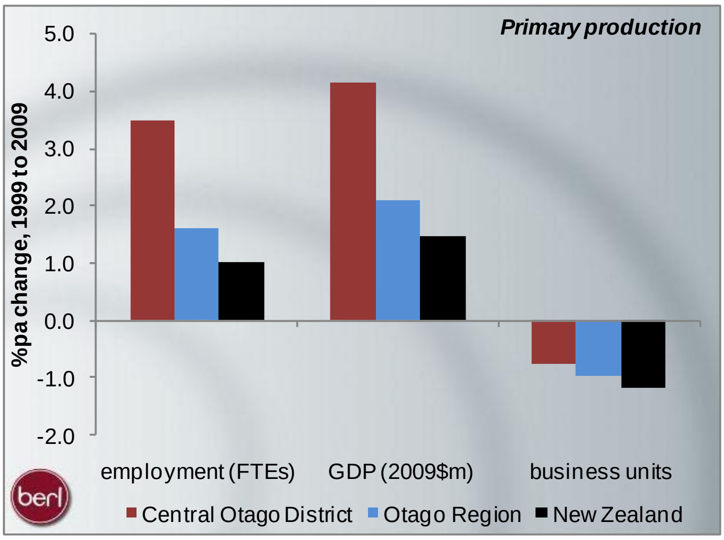
Figure 9.4 shows the change in employment, GDP and business units in the primary production sector in Central Otago District and at a regional and national level since 1999.

Figure 9.4 Primary production sector growth, Central Otago District, Otago Region, New Zealand



The output and employment growth trends for the District's primary production sector continued to exceed the national performance. But the sector continued a trend of business consolidation over the decade, leading to substantial increases in average business size.

9.6.3 Primary processing sector

Table 9.18 presents the recent and longer-term direct contribution of primary processing employment to the Central Otago District economy.

Table 9.18 Primary processing employment in Central Otago District

	Year ending March				*%pa change*	
Primary processing sector employment (FTEs)	**1999**	**2007**	**2008**	**2009**	***2008 to 2009***	***1999 to 2009***
Food, Beverage and Tobacco	194	114	140	209	*48.8*	*0.7*
Wood and Paper Product Manufacturing	43	65	53	51	*-4.0*	*1.7*
Primary processing sector	**237**	**179**	**193**	**259**	***34.4***	***0.9***
Total employment: Central Otago District	**5,894**	**8,251**	**8,790**	**9,394**	***6.9***	***4.8***

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Table 9.19 presents the recent and longer-term direct contribution of primary processing GDP to the Central Otago District economy.

Table 9.19 Primary processing GDP in Central Otago District

	Year ending March				*%pa change*	
Primary processing sector GDP (2009$m)	**1999**	**2007**	**2008**	**2009**	***2008 to 2009***	***1999 to 2009***
Food, Beverage and Tobacco	23.1	16.5	20.4	29.5	*44.6*	*2.5*
Wood and Paper Product Manufacturing	4.7	8.6	7.7	7.3	*-5.8*	*4.5*
Primary processing sector	**27.8**	**25.1**	**28.1**	**36.7**	***30.8***	***2.8***
Total GDP: Central Otago District	**530**	**709**	**745**	**790**	***6.0***	***4.1***

BERL

Table 9.20 presents the recent and longer-term direct contribution of primary processing businesses to the Central Otago District economy.

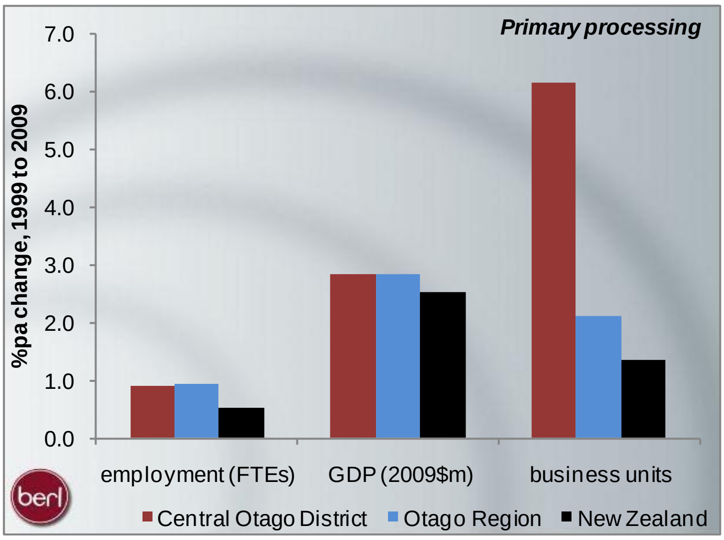
Table 9.20 Primary processing businesses in Central Otago District

	Year ending March				%pa change	
Primary processing sector business units	**1999**	**2007**	**2008**	**2009**	***2008 to 2009***	***1999 to 2009***
Food, Beverage and Tobacco	12	32	33	33	*0.0*	*10.6*
Wood and Paper Product Manufacturing	15	15	18	16	*-11.1*	*0.6*
Primary processing sector	**27**	**47**	**51**	**49**	***-3.9***	***6.1***
Total business units: Central Otago District	**2,233**	**3,064**	**3,204**	**3,258**	***1.7***	***3.8***

BERL

Figure 9.5 shows the change in employment, GDP and business units in the primary processing sector in Central Otago District and at a regional and national level since 1999.

Figure 9.5 Primary processing sector growth, Central Otago District, Otago Region, New Zealand



The primary processing sector's performance has been strongly influenced by the rise of the wine industry in the District. While employment and output in this sector have grown moderately, the number of business units over the past 10 years has risen substantially, driven by an increase in wine manufacturers.

9.6.4 Creative sector

Table 9.21 presents the recent and longer-term direct contribution of creative sector employment to the Central Otago District economy.

Table 9.21 Creative sector employment in Central Otago District

Creative sector employment (FTEs)	Year ending March 1999	2007	2008	2009	%pa change 2008 to 2009	1999 to 2009
Printing and publishing	30	22	21	13	-36.7	-7.8
Arts and antiques market	0	0	0	3	na	na
Commercial services	4	25	46	29	-38.1	22.6
Film, video and television services	12	9	11	5	-59.6	-9.3
Creative arts, studios and venues	0	8	8	9	6.4	na
Creative sector	**46**	**64**	**87**	**59**	**-32.6**	**2.5**
Total employment: Central Otago District	**5,894**	**8,251**	**8,790**	**9,394**	**6.9**	**4.8**

BERL

Table 9.22 presents the recent and longer-term direct contribution of creative sector GDP to the Central Otago District economy.

Table 9.22 Creative sector GDP in Central Otago District

Creative sector GDP (2009$m)	Year ending March 1999	2007	2008	2009	%pa change 2008 to 2009	1999 to 2009
Printing and publishing	2.6	2.0	2.1	1.3	-36.7	-6.6
Arts and antiques market	0.0	0.0	0.0	0.2	na	na
Commercial services	0.3	1.8	3.3	2.1	-37.1	22.7
Film, video and television services	1.4	1.0	1.4	0.6	-54.8	-7.8
Creative arts, studios and venues	0.0	0.4	0.4	0.5	7.7	na
Creative sector	**4.3**	**5.2**	**7.2**	**4.7**	**-35.3**	**0.8**
Total GDP: Central Otago District	**530**	**709**	**745**	**790**	**6.0**	**4.1**

BERL

Table 9.23 presents the recent and longer-term direct contribution of creative sector businesses to the Central Otago District economy.

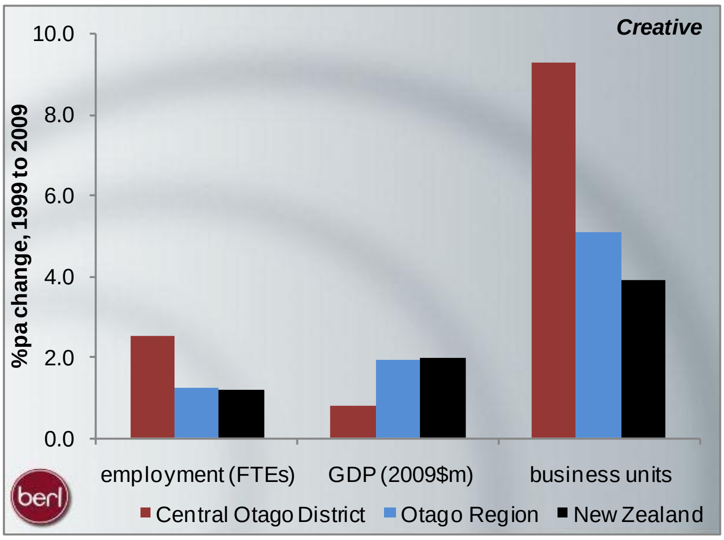
Table 9.23 Creative sector businesses in Central Otago District

Creative sector business units	Year ending March 1999	2007	2008	2009	%pa change 2008 to 2009	1999 to 2009
Printing and publishing	6	2	2	3	50.0	-6.7
Arts and antiques market	1	1	1	3	200.0	11.6
Commercial services	5	17	19	21	7.8	15.9
Film, video and television services	4	6	4	3	-25.0	-2.8
Creative arts, studios and venues	1	11	13	11	-15.4	27.1
Creative sector	**17**	**37**	**39**	**41**	**3.8**	**9.3**
Total business units: Central Otago District	**2,233**	**3,064**	**3,204**	**3,258**	**1.7**	**3.8**

BERL

Figure 9.6 shows the change in employment, GDP and business units in the creative sector in Central Otago District and at a regional and national level since 1999.

Figure 9.6 Creative sector growth, Central Otago District, Otago Region, New Zealand



The District's creative sector is relatively small and has performed modestly over the 10 years to 2009, but fared poorly in 2009. The tables above do, however, suggest that there may have been a shift from employment to self-employment in some industries in this sector during 2009, with employment falling but the number of business units rising.

9.6.5 Education and research sector

Table 9.24 presents the recent and longer-term direct contribution of education and research employment to the Central Otago District economy.

Table 9.24 Education and research employment in Central Otago District

Education & research sector employment (FTEs)	Year ending March 1999	2007	2008	2009	%pa change 2008 to 2009	1999 to 2009
Preschool Education	25	24	48	65	*35.3*	*10.0*
Primary and Secondary Education	255	197	211	224	*6.5*	*-1.3*
Higher Education	25	43	32	43	*35.4*	*5.6*
Other Education	18	52	51	48	*-4.9*	*10.4*
Scientific Research	35	19	23	50	*112.0*	*3.6*
Education & research sector	**358**	**335**	**365**	**430**	***18.0***	***1.9***
Total employment: Central Otago District	**5,894**	**8,251**	**8,790**	**9,394**	***6.9***	***4.8***

BERL

Table 9.25 presents the recent and longer-term direct contribution of education and research GDP to the Central Otago District economy.

Table 9.25 Education and research GDP in Central Otago District

	Year ending March				%pa change	
					2008 to	1999 to
Education & research sector GDP (2009$m)	**1999**	**2007**	**2008**	**2009**	**2009**	**2009**
Preschool Education	1.1	1.3	2.4	3.0	*25.3*	*10.2*
Primary and Secondary Education	12	11	11	10	*-1.4*	*-1.1*
Higher Education	1.1	2.3	1.6	2.0	*25.4*	*5.8*
Other Education	0.8	2.9	2.6	2.2	*-11.9*	*10.5*
Scientific Research	2.5	1.3	1.7	3.6	*115.4*	*3.6*
Education & research sector	**17**	**19**	**19**	**21**	***13.2***	***2.1***
Total GDP: Central Otago District	**530**	**709**	**745**	**790**	***6.0***	***4.1***

BERL

Table 9.26 presents the recent and longer-term direct contribution of education and research businesses to the Central Otago District economy.

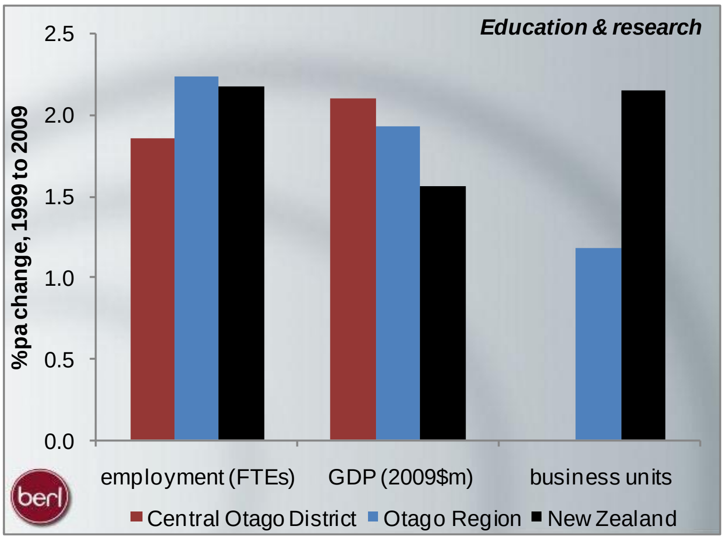
Table 9.26 Education and research businesses in Central Otago District

	Year ending March				%pa change	
					2008 to	1999 to
Education & research sector business units	**1999**	**2007**	**2008**	**2009**	**2009**	**2009**
Preschool Education	13	11	12	13	*8.3*	*0.0*
Primary and Secondary Education	20	17	17	17	*0.0*	*-1.6*
Higher Education	2	2	2	2	*0.0*	*0.0*
Other Education	6	7	8	8	*0.0*	*2.9*
Scientific Research	7	8	8	8	*0.0*	*1.3*
Education & research sector	**48**	**45**	**47**	**48**	***2.1***	***0.0***
Total business units: Central Otago District	**2,233**	**3,064**	**3,204**	**3,258**	***1.7***	***3.8***

BERL

Figure 9.7 shows the change in employment, GDP and business units in the education and research sector in Central Otago District and at a regional and national level since 1999.

Figure 9.7 Education and research sector growth, Central Otago District, Otago Region, New Zealand



The trend for employment in the District's education and research sector has been slightly below the national rate over the past 10 years although GDP has grown faster. The number of businesses has remained constant.

9.6.6 Engineering, and machinery and equipment manufacturing

Table 9.27 presents the recent and longer-term direct contribution of engineering, and machinery and equipment manufacturing employment to the Central Otago District economy.

Table 9.27 Engineering, and machinery and equipment manufacturing employment in Central Otago District

Engineering, machinery & equip mfg sector employment (FTEs)	Year ending March 1999	2007	2008	2009	%pa change 2008 to 2009	1999 to 2009
Machinery and Equipment Manufacturing	39	30	50	51	*2.7*	*2.7*
Consultant Engineering Services	30	38	38	39	*2.6*	*2.6*
Engineering, machinery & equip mfg sector	**69**	**69**	**87**	**90**	***2.7***	***2.7***
Total employment: Central Otago District	**5,894**	**8,251**	**8,790**	**9,394**	***6.9***	***4.8***

BERL

Table 9.28 presents the recent and longer-term direct contribution of engineering, and machinery and equipment manufacturing GDP to the Central Otago District economy.

Table 9.28 Engineering, and machinery and equipment manufacturing GDP in Central Otago District

Engineering, machinery & equip mfg sector GDP (2009$m)	Year ending March 1999	2007	2008	2009	%pa change 2008 to 2009	1999 to 2009
Machinery and Equipment Manufacturing	2.9	2.5	4.2	4.2	*-1.9*	*3.8*
Consultant Engineering Services	2.2	2.6	2.7	2.8	*4.2*	*2.6*
Engineering, machinery & equip mfg sector	**5.0**	**5.1**	**6.9**	**7.0**	***0.5***	***3.3***
Total GDP: Central Otago District	**530**	**709**	**745**	**790**	***6.0***	***4.1***

BERL

Table 9.29 presents the recent and longer-term direct contribution of engineering, and machinery and equipment manufacturing businesses to the Central Otago District economy.

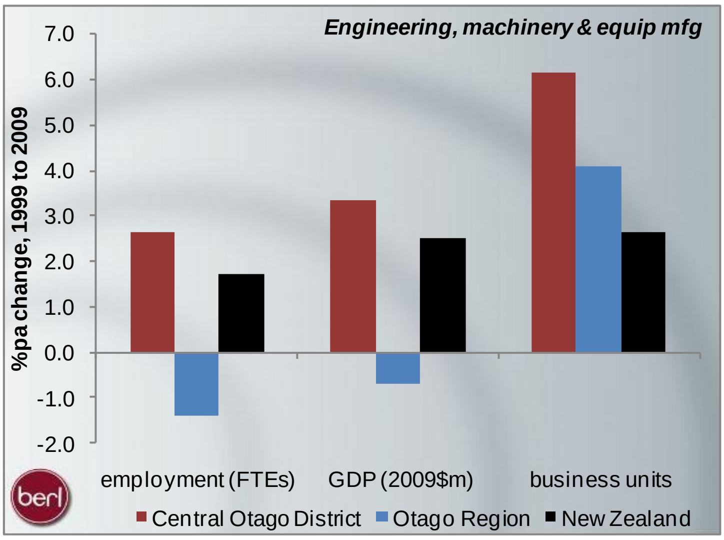
Table 9.29 Engineering, and machinery and equipment manufacturing businesses in Central Otago District

Engineering, machinery & equip mfg sector business units	Year ending March 1999	2007	2008	2009	%pa change 2008 to 2009	1999 to 2009
Machinery and Equipment Manufacturing	15	23	24	28	*16.7*	*6.4*
Consultant Engineering Services	12	22	23	21	*-8.7*	*5.8*
Engineering, machinery & equip mfg sector	**27**	**45**	**47**	**49**	***4.3***	***6.1***
Total business units: Central Otago District	**2,233**	**3,064**	**3,204**	**3,258**	***1.7***	***3.8***

BERL

Figure 9.8 shows the change in employment, GDP and business units in the engineering, and machinery and equipment manufacturing sector in Central Otago District and at a regional and national level since 1999.

Figure 9.8 Engineering, and machinery and equipment manufacturing sector growth, Central Otago District, Otago Region, New Zealand



Although the District's manufacturing sector is reasonably small, it has delivered above average trend growth on all three performance measures presented compared to the country as a whole since 1999.

9.6.7 Horticulture sector

Table 9.30 shows the business units and FTE employment in the horticulture and fruit growing sector in Central Otago for the last three years and 2004.

Table 9.30. Horticulture and fruit growing sector

Industry	Business units					Full Time Equivalents				
	2004	2007	2008	2009	08/09	2004	2007	2008	2009	08/09
Grape Growing	98	124	125	122	-2.4%	115	291	338	401	18.4%
Apple and Pear Growing	58	30	23	24	4.3%	415	141	200	147	-26.3%
Stone Fruit Growing	99	85	99	97	-2.0%	623	1,141	1,171	1,184	1.1%
Plant Nurseries	9	10	9	9	0.0%	6	5	2	2	3.2%
Cut Flower and Flower Seed Growing	15	16	16	16	0.0%	6	0	0	72	
Vegetable Growing	17	9	6	6	0.0%	9	5	4	5	3.2%
Berry Fruit Growing	1	2	1	1	0.0%	9	0	6	6	3.2%
Other Fruit Growing nec	20	34	29	28	-3.4%	0	0	9	9	3.2%
Horticulture and Fruit Growing	**317**	**310**	**308**	**303**	**-1.6%**	**1,183**	**1,583**	**1,730**	**1,826**	**5.5%**

Source: Statistics New Zealand

In 2009, there were 303 enterprises employing 1,826 FTEs in the horticulture and fruit growing sector in Central Otago. Although the number of enterprises has declined slowly, there has been sustained, moderate employment growth over the past five years. These changes have primarily been driven by the grape growing industry, and suggest that there has been some consolidation in this industry. Employment in this industry increased by 28 percent per annum on average over the last five years, and by 18 percent in the last year.

9.6.8 Viticulture sector

The 2009 harvest in Central Otago was heading towards matching the record harvest of 2008, according to the New Zealand Wine Grower (August/September 2009 edition). It also noted, however, that the grape harvest was substantially reduced to improve grape quality and also because of the collapse of a significant number of supply contracts.

Table 9.31 summarises a range of indicators for the Central Otago viticulture sector. The grey portion of the table shows forecast figures.

Table 9.31. Central Otago wine industry

	2002	2003	2004	2005	2006	2007	2008	2009*	2010*	2011*
Producing Vineyard Area (ha)										
Central Otago	534	703	844	978	1,253	1,415	1,522	1,540	1,561	1,598
Total New Zealand	13,787	15,800	18,112	21,002	22,616	25,355	29,310	31,057	32,143	34,739
Production (Tonnes)										
Central Otago	1,519	1,825	1,439	1,441	4,612	3,434	9,495			
Total New Zealand	118,700	76,400	166,000	142,000	185,000	205,000	285,000			
Wineries										
Central Otago	46	52	75	82	82	89	95			
Total New Zealand	398	421	463	516	530	543	585			
Grape Growers										
Central Otago		42	11	17	50	63	75			
Total New Zealand		634	594	825	873	1,007	1,073			

Source: New Zealand Winegrowers Annual Vintage Surveys

A global oversupply of wine, general downward pressure on grape prices and tight credit conditions has created a difficult environment for the viticulture sector across the country. In Central Otago, three significant grape growing and winemaking operations went into insolvency during 2008/09. As such, there may some consolidation of some smaller growers and winemakers. An offsetting effect against this, however, is recognition of the quality of Central Otago's Pinot Noir. This may give growers/winemakers in the region some support as they secure higher than average prices.

The sector's general positivity is apparent in the forecasts for the land under vine out to 2011, as shown in Figure 9.9 below. The production area forecast suggests that the expansion in capacity is slowing. However, as recent plantings mature and their crops come on-line, harvest volumes and employment and employment may climb, unless there is a substantial move towards managing for lower quantity, higher quality harvests.

Figure 9.9. Land in grapes and grape production

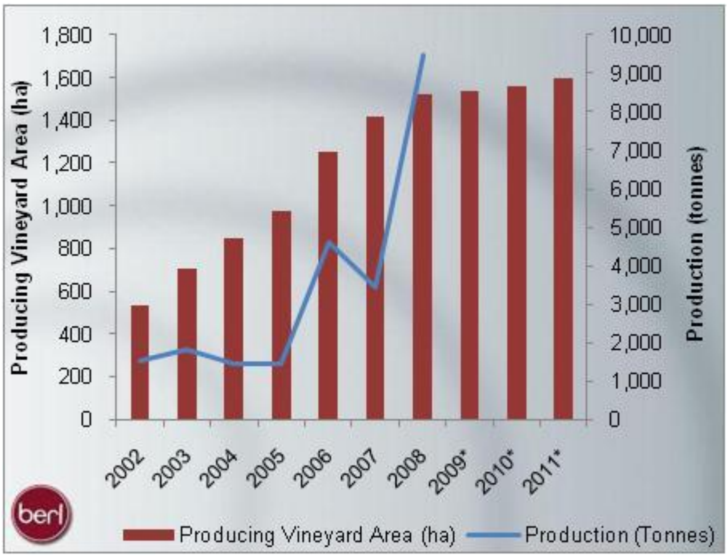


Table 9.32 shows the recent pattern of employment in industries directly connected with the wine industry.

Table 9.32. Employment in the Central Otago wine industry

	Year ending March				%pa change	
Employment (FTEs)	**1999**	**2007**	**2008**	**2009**	***2008 to 2009***	***1999 to 2009***
Wine Manufacturing	6	85	104	158	*51.4*	*38.7*
Grape Growing	49	291	338	401	*18.4*	*23.3*
Viticulture sector	**55**	**377**	**443**	**559**	***26.2***	***26.0***

source: Statistics New Zealand

Employment in these industries climbed rapidly during 2009, and continued a rising long-term trend for the District's viticulture industry.

10 Clutha District

- Clutha District performs well on per capita or per FTE measures that take account of its slow rate of population growth, suggesting that population growth is a major issue for overall economic growth.

- The primary production and processing sectors dominate, with 56 percent of all District employment.

- The decline in population over the long term and the falling numbers of businesses in the business services sector may be linked, with a lack of population growth discouraging new business services and vice versa.

Table 10.1 presents the composition of the Clutha District economy as of 2009, and its share in the regional and national economies.

Table 10.1 Composition of the Clutha economy, 2009

Sector (2009)	FTEs	%of TLA	%of Otago	%of NZ	GDP (09$m)	%of TLA	%of Otago	%of NZ	Bus. units	%of TLA	%of Otago	%of NZ
Primary	3,222	38.8%	31.0%	2.1%	253	32.3%	30.1%	1.9%	1,578	51.6%	32.1%	2.0%
Manufacturing	1,827	22.0%	17.9%	0.8%	242	30.9%	20.2%	1.0%	60	2.0%	6.2%	0.2%
Construction	613	7.4%	7.5%	0.4%	36	4.6%	7.8%	0.4%	154	5.0%	5.4%	0.3%
Retail and Distribution	1,336	16.1%	5.6%	0.3%	86	10.9%	5.4%	0.2%	332	10.8%	6.5%	0.3%
Business Services	263	3.2%	1.9%	0.1%	110	14.1%	4.3%	0.2%	694	22.7%	7.7%	0.4%
Recreation Services	161	1.9%	2.7%	0.1%	7	0.9%	2.2%	0.1%	126	4.1%	6.8%	0.4%
Social Services	885	10.7%	4.7%	0.2%	49	6.3%	4.3%	0.2%	117	3.8%	7.2%	0.4%
Totals	**8,306**	**100.0%**	**9.1%**	**0.4%**	**783**	**100.0%**	**9.6%**	**0.4%**	**3,061**	**100.0%**	**11.6%**	**0.6%**

BERL

The District was largely rural, with the primary sector accounting for between 32 and 52 percent of the local economy. The District accounted for around one-third of the regional primary sector.

Table 10.2 presents the performance of the Clutha District across seven key performance indicators (KPIs) for the latest year, and compares this performance with that of the Otago Region and New Zealand.

Table 10.2 KPIs, Clutha District, 2009

Key Performance Indicators	%pa for 2009 year		
	Clutha District	Otago Region	New Zealand
Resident population growth	**0.3**	0.8	1.1
Real Value Added (GDP) growth	**0.1**	-0.5	-1.1
GDP per capita growth	**-0.2**	-1.3	-2.2
Employment growth	**0.7**	0.8	0.7
Labour productivity growth	**-0.8**	-1.4	-1.9
Business units growth	**-0.7**	1.1	0.3
Business size growth	**1.4**	-0.3	0.3

Source: BERL, Statistics NZ

In a difficult year for the national economy, Clutha District performed reasonably well. GDP grew slightly, while it fell nationally. Coupled with lower than national population growth, GDP per capita shrank far more slowly than at a Regional or national level.

Employment in FTE terms rose 0.7 percent. Labour productivity, which slumped dramatically across New Zealand, declined at half the pace in Clutha District.

The BERL regional database collates data across seven KPIs over a 10-year period. These seven KPIs are listed in Table 10.3, which presents Clutha District's performance over the decade compared to the Otago Region and New Zealand as a whole.

Table 10.3 KPIs, Clutha District, 1999 to 2009

Key Performance Indicators	%pa for 1999-2009		
	Clutha District	Otago Region	New Zealand
Resident population growth	**-0.2**	1.0	1.2
Real Value Added (GDP) growth	**1.8**	3.1	3.1
GDP per capita growth	**2.1**	2.1	1.8
Employment growth	**1.1**	2.8	2.4
Productivity growth	**0.9**	0.4	0.8
Business units growth	**1.8**	3.7	3.0
Business size growth	**-0.8**	-0.9	-0.6

Source: BERL, Statistics NZ

The major economic difficulty the District faces is a falling population. As New Zealand recorded a 1.2 percent a year population expansion, the District saw its number of residents decline by 0.2 percent. This 1.4 percent swing more than accounts for the lower growth in GDP, employment and business units.

Indicators that remove the influence of population or workforce size, such as GDP per capita or labour productivity, show that the District is more than holding its own.

10.1 Employment

Table 10.4 shows employment numbers for Clutha District for the last three periods and the longer term. It also shows the aggregate change over the same period for New Zealand and the Otago Region.

Table 10.4 Clutha District employment summary

	Employment Number FTEs				%pa change		
Sector	**1999**	**2007**	**2008**	**2009**	**2007 to 2008**	**2008 to 2009**	**1999 to 2009**
Primary	2,865	3,395	3,323	3,222	-2.1	-3.0	1.2
Manufacturing	1,670	1,771	1,749	1,827	-1.2	4.5	0.9
Construction	557	564	614	613	8.9	-0.2	1.0
Retail and Distribution	1,211	1,279	1,343	1,336	5.1	-0.5	1.0
Business Services	341	269	252	263	-6.4	4.4	-2.6
Recreation Services	105	145	146	161	1.2	10.0	4.4
Social Services	729	770	821	885	6.7	7.7	2.0
Clutha District	**7,478**	**8,191**	**8,248**	**8,306**	**0.7**	**0.7**	**1.1**
Otago Region	**68,939**	**89,664**	**90,440**	**91,130**	**0.9**	**0.8**	**2.8**
New Zealand	**1,473,526**	**1,840,284**	**1,854,636**	**1,866,747**	**0.8**	**0.7**	**2.4**

Source: BERL, Statistics NZ

Almost 40 percent of FTEs are in the primary sector, so whatever happens in that sector is likely to play a major role in the fortunes of the economy. Declines in employment in the sector in the last two years have stunted District employment growth although overall growth has kept up with Regional and national changes.

Somewhat concerning is the long-term decline in business services employment in the District. Across New Zealand, business services employment has tended to be among the fastest-growing. It may be that the falling population and the disestablishment of business services jobs work in a downward cycle. Falling resident numbers discourage investment by business services organisations, while a drop in the variety of business services available discourage immigration.

10.2 GDP

Table 10.5 describes the GDP for Clutha District, and compares its performance to that of New Zealand and the Otago Region.

Table 10.5 Clutha District GDP summary

	Value Added or GDP (2009$m)				%pa change		
Sector	**1999**	**2007**	**2008**	**2009**	**2007 to 2008**	**2008 to 2009**	**1999 to 2009**
Primary	197	270	262	253	-3.0	-3.4	2.5
Manufacturing	181	235	238	242	1.3	1.7	3.0
Construction	33	34	37	36	10.0	-3.4	0.9
Retail and Distribution	70	81	89	86	9.5	-3.3	2.1
Business Services	120	103	102	110	-1.5	8.4	-0.9
Recreation Services	5.1	6.6	7.0	7.0	5.7	1.0	3.3
Social Services	48	45	49	49	8.0	1.6	0.4
Clutha District	**653**	**774**	**783**	**783**	**1.1**	**0.1**	**1.8**
Otago Region	**6,020**	**7,971**	**8,176**	**8,139**	**2.6**	**-0.5**	**3.1**
New Zealand	**136,841**	**181,968**	**187,651**	**185,554**	**3.1**	**-1.1**	**3.1**

Source: BERL, Statistics NZ

The picture for GDP is much like that for employment, with most sectors hit hard in 2009, but recording growth to some extent or another across all sectors except business services since 1999.

The strongest long-term rises have been in recreation services and manufacturing. Given the general slump in manufacturing in New Zealand, this last result is particularly encouraging. The expansion has been in dairy processing, printing, and agricultural equipment manufacturing.

10.2.1 Labour productivity

Table 10.6 presents the changes in labour productivity for Clutha District sectors for the last 10 years, along with a national and Regional comparison.

Table 10.6 Clutha District labour productivity summary

	Productivity (2009$ per FTE)				%pa change		
Sector	**1999**	**2007**	**2008**	**2009**	**2007 to 2008**	**2008 to 2009**	**1999 to 2009**
Primary	68,644	79,437	78,706	78,454	-0.9	-0.3	1.3
Manufacturing	108,213	132,598	136,017	132,499	2.6	-2.6	2.0
Construction	59,014	60,162	60,789	58,824	1.0	-3.2	0.0
Retail and Distribution	57,427	63,279	65,941	64,088	4.2	-2.8	1.1
Business Services (#)	194,481	188,391	196,290	215,869	4.2	10.0	1.0
Recreation Services	48,367	45,512	47,559	43,662	4.5	-8.2	-1.0
Social Services	65,359	58,520	59,207	55,875	1.2	-5.6	-1.6
Clutha District (#)	**80,080**	**88,092**	**88,539**	**87,850**	**0.5**	**-0.8**	**0.9**
Otago Region (#)	**80,092**	**82,863**	**84,365**	**83,210**	**1.8**	**-1.4**	**0.4**
New Zealand (#)	**85,181**	**92,168**	**94,419**	**92,607**	**2.4**	**-1.9**	**0.8**

 # excl owner-occupied dwellings sector

Source: BERL, Statistics NZ

The large contribution of the manufacturing sector to the Clutha economy (22 percent of employment, 31 percent of GDP) helped the District develop an average labour productivity well above the Regional average and near that of New Zealand overall.

The business services sector has seemingly been able to maintain labour productivity growth through cuts in employment, while the manufacturing sector's labour productivity rises have, more positively, accompanied job increases.

10.3 Business units and size

Table 10.7 shows the change in the number of businesses within each sector in the Clutha District over the last 10 years. It also shows overall national and Regional business unit growth.

Table 10.7 Clutha District business units summary

	Business Units (number)				%pa change		
Sector	**1999**	**2007**	**2008**	**2009**	**2007 to 2008**	**2008 to 2009**	**1999 to 2009**
Primary	1,598	1,672	1,614	1,578	-3.5	-2.2	-0.1
Manufacturing	60	63	62	60	-1.6	-3.2	0.0
Construction	113	150	152	154	1.3	1.3	3.1
Retail and Distribution	308	343	341	332	-0.6	-2.6	0.8
Business Services	260	653	674	694	3.2	3.0	10.3
Recreation Services	95	118	119	126	0.8	5.9	2.9
Social Services	121	121	120	117	-0.8	-2.5	-0.3
Clutha District	**2,555**	**3,120**	**3,082**	**3,061**	**-1.2**	**-0.7**	**1.8**
Otago Region	**18,258**	**25,403**	**26,092**	**26,367**	**2.7**	**1.1**	**3.7**
New Zealand	**379,701**	**500,728**	**511,030**	**512,580**	**2.1**	**0.3**	**3.0**

Source: BERL, Statistics NZ

The number of businesses in the District has fallen in the last two years, while over the decade, Clutha has added a further 500 businesses.

While employment and GDP in business services has dropped, the number of businesses in the sector has surged, more than doubling since 1999. This indicates that the average business services business in Clutha is now far smaller than it was 10 years ago in employment and contribution to GDP terms.

10.3.1 Business size

Table 10.8 shows the changes in average business size at the seven sector level and the District level for Clutha, compared with national and Regional trends.

Table 10.8 Clutha District business size summary

	Business Size (FTEs per unit)				%pa change		
Sector	1999	2007	2008	2009	2007 to 2008	2008 to 2009	1999 to 2009
Primary	1.8	2.0	2.1	2.0	1.4	-0.8	1.3
Manufacturing	27.8	28.1	28.2	30.4	0.4	7.9	0.9
Construction	4.9	3.8	4.0	4.0	7.4	-1.5	-2.1
Retail and Distribution	3.9	3.7	3.9	4.0	5.7	2.2	0.2
Business Services	1.3	0.4	0.4	0.4	-9.3	1.4	-11.7
Recreation Services	1.1	1.2	1.2	1.3	0.3	3.9	1.5
Social Services	6.0	6.4	6.8	7.6	7.6	10.5	2.3
Clutha District	**2.9**	**2.6**	**2.7**	**2.7**	**1.9**	**1.4**	**-0.8**
Otago Region	**3.8**	**3.5**	**3.5**	**3.5**	**-1.8**	**-0.3**	**-0.9**
New Zealand	**3.9**	**3.7**	**3.6**	**3.6**	**-1.3**	**0.3**	**-0.6**

Source: BERL, Statistics NZ

Business sizes are shrinking across the country. Behaviour in the Clutha District is largely in step with these changes. Interestingly, most sectors saw average business size grow in 2009. This may have been as some of the smaller, less financially resilient businesses folded in the tough economic climate, meaning the average size of remaining businesses was higher.

Since 1999, the average size of each business services business has fallen by two-thirds, to 0.4 FTEs per business. This indicates that many of these businesses are part-time endeavours, perhaps including property investment or other activities that can be run part-time.

10.4 Fastest-growing industries

Industries are compared at the 53-industry level. The analysis only covers industries that have over 25 FTEs and, for GDP, those industries earning over $2.25 million.

10.4.1 Employment

Table 10.9 presents the ten fastest growing industries in Clutha District by FTE employment.

Table 10.9 Ten fastest growing industries by FTE growth

Rank by FTE growth	Industry	FTEs 2006	2007	2008	2009	%pa growth 2008 to 2009	2006 to 2009
1	Other Services	59	62	63	82	29.5	11.1
2	Finance	32	33	36	43	20.1	9.7
3	Education	352	413	424	463	9.3	9.6
4	Food Retailing	250	283	281	326	15.7	9.2
5	Communication Services	28	35	35	35	2.0	7.6
6	Non-Metallic Mineral Product Manufacturing	56	57	60	68	13.3	6.5
7	Health Services	255	262	281	292	4.0	4.6
8	Motor Vehicle Retailing and Services	179	194	189	202	6.9	4.1
9	Road Transport	220	180	239	240	0.5	3.1
10	Property Services	43	47	37	46	25.1	2.6

Source: BERL, Statistics NZ

Over the three years to 2009, some clear trends have emerged. Education has seen solid gains each year, with employment up almost 10 percent a year. Food retailing has grown almost as fast, which is interesting given that this runs counter to the declining population. Higher percentage gains, off smaller absolute bases, were recorded in other services and finance.[8]

10.4.2 GDP

Table 10.10 presents the ten fastest growing industries by GDP growth in the three years to March 2009.

Table 10.10 Ten fastest growing industries by GDP

Rank by GDP growth	Industry	GDP (2009$m) 2006	2007	2008	2009	%pa growth 2008 to 2009	2006 to 2009
1	Other Mining	1.6	1.8	2.5	5.2	108.5	49.6
2	Finance	8.6	9.0	11	13	24.3	15.1
3	Communication Services	11	15	15	16	9.9	14.9
4	Coal Mining	1.6	1.7	2.2	2.5	11.1	14.3
5	Food Retailing	13	15	16	17	9.2	9.0
6	Other Services	1.8	1.9	1.9	2.3	20.1	8.9
7	Motor Vehicle Retailing and Services	10	12	12	13	8.2	8.5
8	Wood and Paper Product Manufacturing	36	38	42	42	0.0	5.5
9	Education	17	19	19	19	0.0	4.7
10	Health Services	19	20	22	22	1.1	4.6

Source: BERL, Statistics NZ

In GDP terms, the fastest growth has been in other mining, at almost 50 percent a year for the last two years. Finance, communication services, and coal mining have also recorded double digit annual growth since 2006. The strongest dollar terms gain has been in wood

[8] Other services includes religious organizations; interest groups; policing; fire services; waste disposal services; and corrective services.

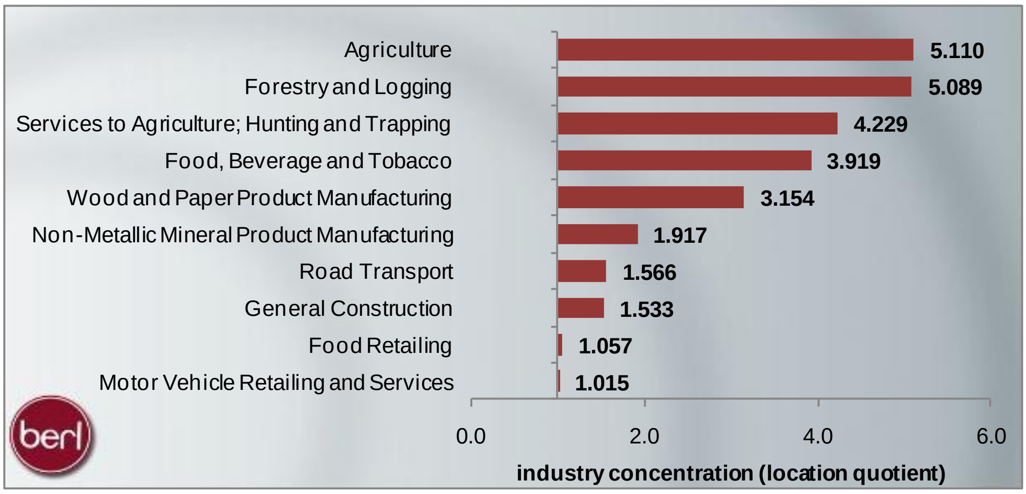
and paper product manufacturing, which added $6.2 million more to GDP in 2009 than in 2006.

10.5 Location quotients

This section looks at the concentration of industries in Clutha District compared to the national average. Again the analysis is at the 53-industry level.

Figure 10.1 shows the ten industries with the highest location quotients. Because of the small numbers in some industries in Clutha District, we only compare those industries that have at least 25 FTEs.[9]

Figure 10.1 Ten industries with the highest FTE location quotients



The District's primary sector focus is evident from the high concentrations of employment in primary production and processing industries. Workers in the District are more than four times as likely to be employed in agriculture; forestry; or services to agriculture, hunting and trapping than elsewhere in New Zealand. They are more than three times as likely to be employed in primary processing industries such as food and beverage manufacturing or wood and paper product manufacturing.

Figure 10.2 shows the ten industries with the lowest location quotients in the Clutha District. In other words, these industries, while they have some representation in the District, are ones in which workers at a national level are far more likely to be employed than in the District.

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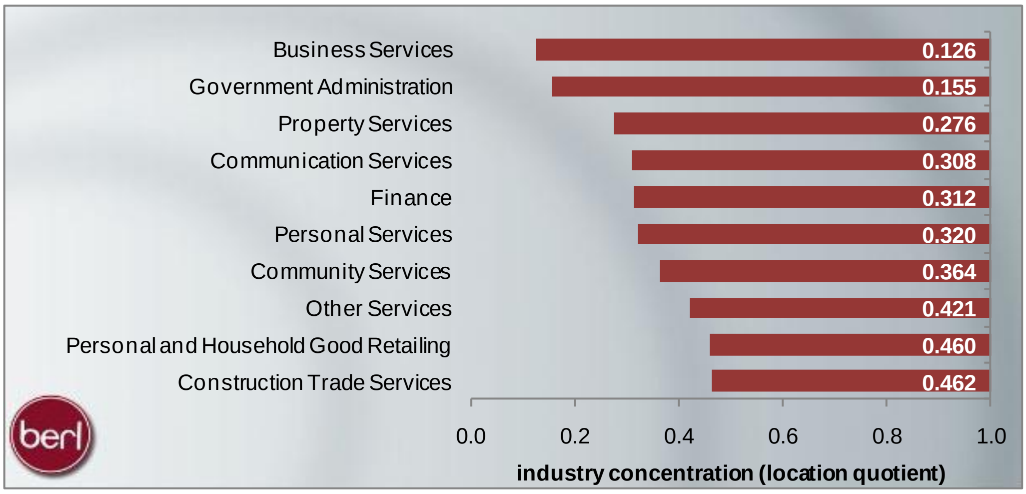
[9] Twenty-eight industries in Clutha District employ over 25 FTEs.

Figure 10.2 Ten industries with the lowest FTE location quotients



The Clutha District is characterised by a large number of industries with extremely low location quotients. Given the rural nature of the District, these tend to be service industries such as finance; business; personal; and community services. For instance, workers in the District are eight times less likely to be employed in business services than in New Zealand overall.

10.6 Key sectors in the District

This chapter summarises the performance of six key sectors highlighted in the Economic Development Strategy for the Otago Region, and in our analysis of major employers in the District. The performance of each sector is assessed in terms of changes in employment, GDP, and business units.

10.6.1 Tourism sector

Table 10.11 presents the recent and longer-term direct contribution of tourism employment to the Clutha District economy.

Table 10.11 Tourism employment in Clutha District

	Years ended March				*%pa change*	
Tourism employment (FTEs)	**1999**	**2007**	**2008**	**2009**	***2008 to 2009***	***1999 to 2009***
Tourism-characteristic industries	130	139	136	146	*7.4*	*1.2*
Tourism-related industries	60	67	70	68	*-2.6*	*1.2*
All non-tourism-related industries	54	59	60	60	*1.0*	*1.1*
Tourism sector	**244**	**266**	**266**	**275**	***3.3***	***1.2***
Total employment: Clutha District	**7,478**	**8,191**	**8,248**	**8,306**	***0.7***	***1.1***

BERL, Tourism Satellite Account

Table 10.12 presents the recent and longer-term direct contribution of tourism GDP to the Clutha District economy.

Table 10.12 Tourism GDP in Clutha District

Tourism GDP (2009$m)	1999	2007	2008	2009	%pa change 2008 to 2009	%pa change 1999 to 2009
Tourism-characteristic industries	5.7	5.4	5.5	5.7	*3.2*	*0.0*
Tourism-related industries	2.7	3.7	3.8	3.8	*0.0*	*3.4*
All non-tourism-related industries	5.5	6.4	6.3	6.3	*-1.1*	*1.4*
Tourism sector	**13.9**	**15.4**	**15.7**	**15.8**	***0.7***	***1.3***
Total GDP: Clutha District	**653**	**774**	**783**	**783**	***0.1***	***1.8***

BERL, Tourism Satellite Account

Table 10.13 presents the recent and longer-term direct contribution of tourism businesses to the Clutha District economy.

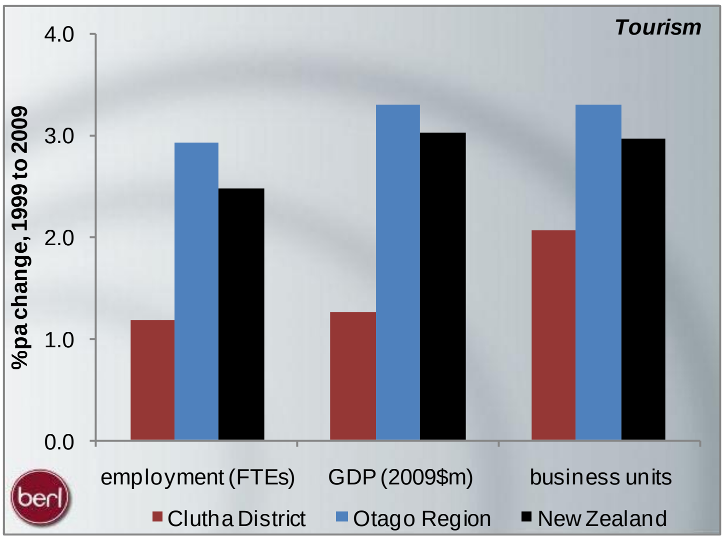
Table 10.13 Tourism businesses in Clutha District

Tourism businesses	1999	2007	2008	2009	%pa change 2008 to 2009	%pa change 1999 to 2009
Tourism-characteristic industries	40	54	54	54	*-0.2*	*3.1*
Tourism-related industries	16	15	15	14	*-1.9*	*-0.8*
All non-tourism-related industries	19	23	23	23	*-0.6*	*2.0*
Tourism sector	**74**	**93**	**91**	**91**	***-0.6***	***2.1***
Total business units: Clutha District	**2,555**	**3,120**	**3,082**	**3,061**	***-0.7***	***1.8***

BERL, Tourism Satellite Account

Figure 10.3 shows the change in employment, GDP and business units in the tourism sector in Clutha District and at a regional and national level since 1999.

Figure 10.3 Tourism sector growth, Clutha District, Otago Region, New Zealand



Clutha District has seen growth in tourism indicators over the 10 years to 2009, but at rates below that seen in New Zealand overall. The number of businesses has grown at double the rate of employment, indicating that the average tourism business is smaller than in earlier years.

10.6.2 Primary production sector

Table 10.14 presents the recent and longer-term direct contribution of primary production employment to the Clutha District economy.

Table 10.14 Primary production employment in Clutha District

	Year ending March				*%pa change*	
Primary production sector employment (FTEs)	**1999**	**2007**	**2008**	**2009**	***2008 to 2009***	***1999 to 2009***
Agriculture	2,182	2,675	2,658	2,570	*-3.3*	*1.7*
Services to Agriculture; Hunting and Trapping	496	534	498	467	*-6.3*	*-0.6*
Forestry and Logging	148	158	139	143	*2.5*	*-0.4*
Commercial Fishing	15	10	11	11	*3.4*	*-2.9*
Mining and services to mining	24	18	17	31	*78.8*	*2.6*
Primary production sector	**2,865**	**3,395**	**3,323**	**3,222**	***-3.0***	***1.2***
Total employment: Clutha District	**7,478**	**8,191**	**8,248**	**8,306**	***0.7***	***1.1***

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Table 10.15 presents the recent and longer-term direct contribution of primary production GDP to the Clutha District economy.

Table 10.15 Primary production GDP in Clutha District

	Year ending March				*%pa change*	
Primary production sector GDP (2009$m)	**1999**	**2007**	**2008**	**2009**	***2008 to 2009***	***1999 to 2009***
Agriculture	137	196	191	184	*-3.8*	*3.0*
Services to Agriculture; Hunting and Trapping	23	20	18	15	*-16.1*	*-3.8*
Forestry and Logging	30	50	46	45	*-3.0*	*4.1*
Commercial Fishing	1	1	1	1	*-5.0*	*-5.3*
Mining and services to mining	6	3	5	8	*62.6*	*2.9*
Primary production sector	**197**	**270**	**262**	**253**	***-3.4***	***2.5***
Total GDP: Clutha District	**653**	**774**	**783**	**783**	***0.1***	***1.8***

BERL

Table 10.16 presents the recent and longer-term direct contribution of primary production businesses to the Clutha District economy.

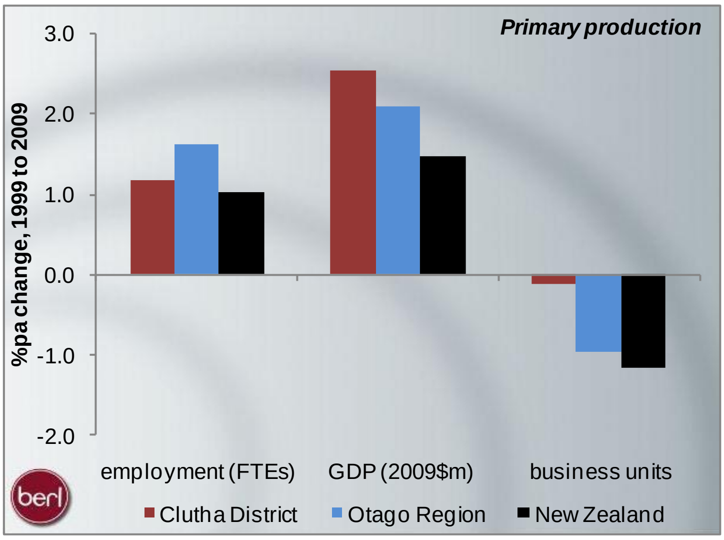
Table 10.16 Primary production businesses in Clutha District

	Year ending March				*%pa change*	
Primary production sector business units	**1999**	**2007**	**2008**	**2009**	***2008 to 2009***	***1999 to 2009***
Agriculture	1,390	1,323	1,281	1,250	*-2.4*	*-1.1*
Services to Agriculture; Hunting and Trapping	72	155	138	142	*2.9*	*7.0*
Forestry and Logging	125	177	181	174	*-3.9*	*3.4*
Commercial Fishing	8	12	9	8	*-11.1*	*0.0*
Mining and services to mining	3	5	5	4	*-20.0*	*2.9*
Primary production sector	**1,598**	**1,672**	**1,614**	**1,578**	***-2.2***	***-0.1***
Total business units: Clutha District	**2,555**	**3,120**	**3,082**	**3,061**	***-0.7***	***1.8***

BERL

Figure 10.4 shows the change in employment, GDP and business units in the primary production sector in Clutha District and at a regional and national level since 1999.

Figure 10.4 Primary production sector growth, Clutha District, Otago Region, New Zealand



The Clutha primary production sector has done well when seen from a national perspective, with moderate employment growth and labour productivity rises of 1.3 percent a year ensuring strong GDP growth of 2.5 percent a year. Business units have declined at a rate lower than the national average, indicating some growth in the average business size.

10.6.3 Primary processing sector

Table 10.17 presents the recent and longer-term direct contribution of primary processing employment to the Clutha District economy.

Table 10.17 Primary processing employment in Clutha District

	Year ending March				%pa change	
Primary processing sector employment (FTEs)	**1999**	**2007**	**2008**	**2009**	***2008 to 2009***	***1999 to 2009***
Food, Beverage and Tobacco	1,018	1,108	1,086	1,152	*6.1*	*1.2*
Wood and Paper Product Manufacturing	329	288	287	292	*1.9*	*-1.2*
Primary processing sector	**1,347**	**1,397**	**1,373**	**1,444**	***5.2***	***0.7***
Total employment: Clutha District	**7,478**	**8,191**	**8,248**	**8,306**	***0.7***	***1.1***

BERL

Table 10.18 presents the recent and longer-term direct contribution of primary processing GDP to the Clutha District economy.

Table 10.18 Primary processing GDP in Clutha District

	Year ending March				%pa change	
Primary processing sector GDP (2009$m)	1999	2007	2008	2009	2008 to 2009	1999 to 2009
Food, Beverage and Tobacco	121	160	158	163	*3.0*	*3.0*
Wood and Paper Product Manufacturing	36	38	42	42	*0.0*	*1.6*
Primary processing sector	**157**	**199**	**200**	**205**	***2.4***	***2.7***
Total GDP: Clutha District	**653**	**774**	**783**	**783**	***0.1***	***1.8***

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Table 10.19 presents the recent and longer-term direct contribution of primary processing businesses to the Clutha District economy.

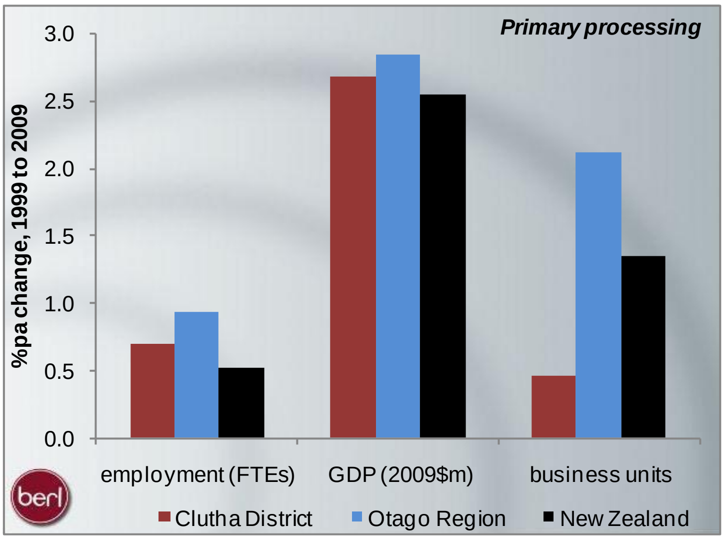
Table 10.19 Primary processing businesses in Clutha District

	Year ending March				%pa change	
Primary processing sector business units	1999	2007	2008	2009	2008 to 2009	1999 to 2009
Food, Beverage and Tobacco	5	6	6	6	*0.0*	*1.8*
Wood and Paper Product Manufacturing	16	17	17	16	*-5.9*	*0.0*
Primary processing sector	**21**	**23**	**23**	**22**	***-4.3***	***0.5***
Total business units: Clutha District	**2,555**	**3,120**	**3,082**	**3,061**	***-0.7***	***1.8***

BERL

Figure 10.5 shows the change in employment, GDP and business units in the primary processing sector in Clutha District and at a regional and national level since 1999.

Figure 10.5 Primary processing sector growth, Clutha District, Otago Region, New Zealand



The sector has performed well in the Clutha District in the last 10 years, with growth across all indicators. GDP is up particularly strongly, with labour productivity rises of two percent a year, double the national average productivity gain across all industries.

10.6.4 Creative sector

Table 10.20 presents the recent and longer-term direct contribution of creative sector employment to the Clutha District economy.

Table 10.20 Creative sector employment in Clutha District

	Year ending March				%pa change	
Creative sector employment (FTEs)	**1999**	**2007**	**2008**	**2009**	***2008 to 2009***	***1999 to 2009***
Printing and publishing	47	77	79	75	*-6.0*	*4.7*
Arts and antiques market	6	6	6	6	*5.5*	*-0.3*
Commercial services	0	3	4	4	*2.6*	*na*
Film, video and television services	0	0	3	3	*1.1*	*na*
Creative arts, studios and venues	6	9	9	9	*4.0*	*4.5*
Creative sector	**59**	**94**	**100**	**96**	***-4.0***	***5.0***
Total employment: Clutha District	**7,478**	**8,191**	**8,248**	**8,306**	***0.7***	***1.1***

BERL

Table 10.21 presents the recent and longer-term direct contribution of creative sector GDP to the Clutha District economy.

Table 10.21 Creative sector GDP in Clutha District

	Year ending March				%pa change	
Creative sector GDP (2009$m)	**1999**	**2007**	**2008**	**2009**	***2008 to 2009***	***1999 to 2009***
Printing and publishing	4.1	7.1	7.9	7.4	*-6.0*	*6.1*
Arts and antiques market	0.3	0.3	0.3	0.3	*2.4*	*1.4*
Commercial services	0.0	0.2	0.3	0.3	*4.2*	*na*
Film, video and television services	0.0	0.0	0.3	0.4	*13.0*	*na*
Creative arts, studios and venues	0.3	0.4	0.4	0.4	*8.3*	*4.9*
Creative sector	**4.7**	**8.0**	**9.2**	**8.8**	***-4.1***	***6.6***
Total GDP: Clutha District	**653**	**774**	**783**	**783**	***0.1***	***1.8***

BERL

Table 10.22 presents the recent and longer-term direct contribution of creative sector businesses to the Clutha District economy.

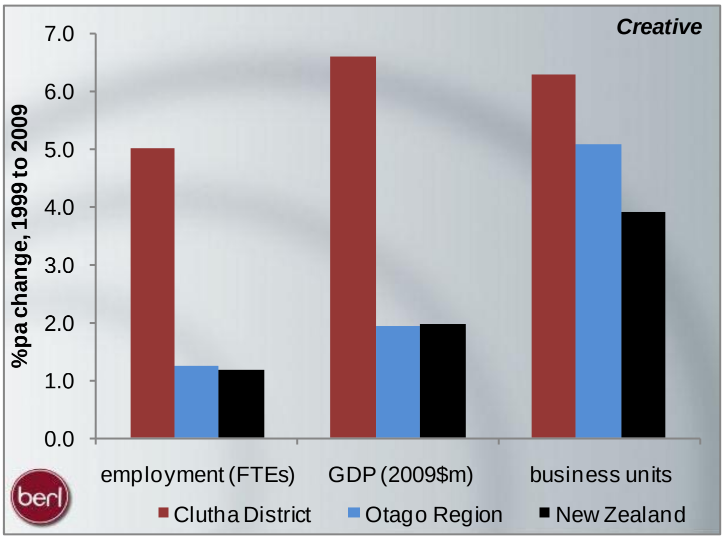
Table 10.22 Creative sector businesses in Clutha District

	Year ending March				%pa change	
Creative sector business units	**1999**	**2007**	**2008**	**2009**	***2008 to 2009***	***1999 to 2009***
Printing and publishing	4	3	4	4	*0.0*	*0.0*
Arts and antiques market	2	4	3	3	*0.0*	*4.1*
Commercial services	1	4	4	6	*47.1*	*20.1*
Film, video and television services	1	1	1	1	*0.0*	*0.0*
Creative arts, studios and venues	3	7	5	6	*20.0*	*7.2*
Creative sector	**11**	**19**	**17**	**20**	***17.4***	***6.3***
Total business units: Clutha District	**2,555**	**3,120**	**3,082**	**3,061**	***-0.7***	***1.8***

BERL

Figure 10.6 shows the change in employment, GDP and business units in the creative sector in Clutha District and at a regional and national level since 1999.

Figure 10.6 Creative sector growth, Clutha District, Otago Region, New Zealand



This sector has seen the most spectacular growth of the six sectors discussed for the District, albeit off a relatively small base. The indicators have averaged growth of between 5.0 percent and 6.6 percent a year, with strong labour productivity growth of 1.6 percent a year.

10.6.5 Education and research sector

Table 10.23 presents the recent and longer-term direct contribution of education and research employment to the Clutha District economy.

Table 10.23 Education and research employment in Clutha District

	Year ending March				*%pa change*	
Education & research sector employment (FTEs)	**1999**	**2007**	**2008**	**2009**	***2008 to 2009***	***1999 to 2009***
Preschool Education	30	40	44	61	*38.2*	*7.3*
Primary and Secondary Education	285	289	290	312	*7.7*	*0.9*
Higher Education	0	74	77	79	*3.0*	*na*
Other Education	35	11	13	11	*-14.1*	*-10.6*
Scientific Research	3	0	0	0	*na*	*-100.0*
Education & research sector	**353**	**413**	**424**	**463**	***9.3***	***2.8***
Total employment: Clutha District	**7,478**	**8,191**	**8,248**	**8,306**	***0.7***	***1.1***

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Table 10.24 presents the recent and longer-term direct contribution of education and research GDP to the Clutha District economy.

Table 10.24 Education and research GDP in Clutha District

	Year ending March				%pa change	
					2008 to	*1999 to*
Education & research sector GDP (2009$m)	**1999**	**2007**	**2008**	**2009**	***2009***	***2009***
Preschool Education	1.4	1.9	2.0	2.5	*26.5*	*5.6*
Primary and Secondary Education	14	13	13	13	*-1.5*	*-0.7*
Higher Education	0.0	3.4	3.4	3.3	*-5.7*	*na*
Other Education	1.7	0.5	0.6	0.5	*-21.5*	*-12.0*
Scientific Research	0.2	0.0	0.0	0.0	*na*	*-100.0*
Education & research sector	**17**	**19**	**19**	**19**	***0.0***	***1.1***
Total GDP: Clutha District	**653**	**774**	**783**	**783**	***0.1***	***1.8***

BERL

Table 10.25 presents the recent and longer-term direct contribution of education and research businesses to the Clutha District economy.

Table 10.25 Education and research businesses in Clutha District

	Year ending March				%pa change	
					2008 to	*1999 to*
Education & research sector business units	**1999**	**2007**	**2008**	**2009**	***2009***	***2009***
Preschool Education	16	18	18	18	*0.0*	*1.2*
Primary and Secondary Education	26	25	25	24	*-4.0*	*-0.8*
Higher Education	0	1	1	1	*0.0*	*na*
Other Education	11	5	6	4	*-33.3*	*-9.6*
Scientific Research	1	0	0	0	*na*	*-100.0*
Education & research sector	**54**	**49**	**50**	**47**	***-6.0***	***-1.4***
Total business units: Clutha District	**2,555**	**3,120**	**3,082**	**3,061**	***-0.7***	***1.8***

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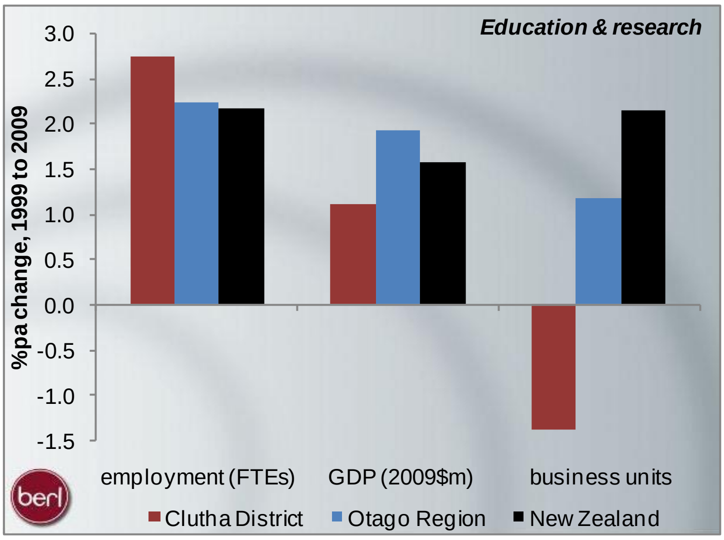
Figure 10.7 shows the change in employment, GDP and business units in the education and research sector in Clutha District and at a regional and national level since 1999.

Figure 10.7 Education and research sector growth, Clutha District, Otago Region, New Zealand



The education and research sector in Clutha has seen mixed results since 1999, with employment rising faster than nationally, GDP growing slightly more slowly, and business units declining. With business numbers and employment moving in opposite directions, the average Clutha education and research business is now 50 percent larger than it was in 1999, at 9.9 FTEs per business, up from 6.5.

10.6.6 Engineering, and machinery and equipment manufacturing

Table 10.26 presents the recent and longer-term direct contribution of engineering, and machinery and equipment manufacturing employment to the Clutha District economy.

Table 10.26 Engineering, and machinery and equipment manufacturing employment in Clutha District

	Year ending March				%pa change	
Engineering, machinery & equip mfg sector employment (FTEs)	**1999**	**2007**	**2008**	**2009**	***2008 to 2009***	***1999 to 2009***
Machinery and Equipment Manufacturing	87	112	118	123	*4.4*	*3.5*
Consultant Engineering Services	18	35	24	21	*-12.1*	*1.7*
Engineering, machinery & equip mfg sector	**105**	**147**	**142**	**144**	***1.6***	***3.2***
Total employment: Clutha District	**7,478**	**8,191**	**8,248**	**8,306**	***0.7***	***1.1***

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Table 10.27 presents the recent and longer-term direct contribution of engineering, and machinery and equipment manufacturing GDP to the Clutha District economy.

Table 10.27 Engineering, and machinery and equipment manufacturing GDP in Clutha District

	Year ending March				%pa change	
Engineering, machinery & equip mfg sector GDP (2009$m)	**1999**	**2007**	**2008**	**2009**	***2008 to 2009***	***1999 to 2009***
Machinery and Equipment Manufacturing	6.4	9.1	10.1	10.1	*-0.3*	*4.7*
Consultant Engineering Services	1.3	2.4	1.7	1.5	*-10.7*	*1.8*
Engineering, machinery & equip mfg sector	**7.7**	**11.5**	**11.8**	**11.6**	***-1.8***	***4.2***
Total GDP: Clutha District	**653**	**774**	**783**	**783**	***0.1***	***1.8***

BERL

Table 10.28 presents the recent and longer-term direct contribution of engineering, and machinery and equipment manufacturing businesses to the Clutha District economy.

Table 10.28 Engineering, and machinery and equipment manufacturing businesses in Clutha District

	Year ending March				%pa change	
Engineering, machinery & equip mfg sector business units	**1999**	**2007**	**2008**	**2009**	***2008 to 2009***	***1999 to 2009***
Machinery and Equipment Manufacturing	18	18	16	14	*-12.5*	*-2.5*
Consultant Engineering Services	2	8	6	7	*16.7*	*13.3*
Engineering, machinery & equip mfg sector	**20**	**26**	**22**	**21**	***-4.5***	***0.5***
Total business units: Clutha District	**2,555**	**3,120**	**3,082**	**3,061**	***-0.7***	***1.8***

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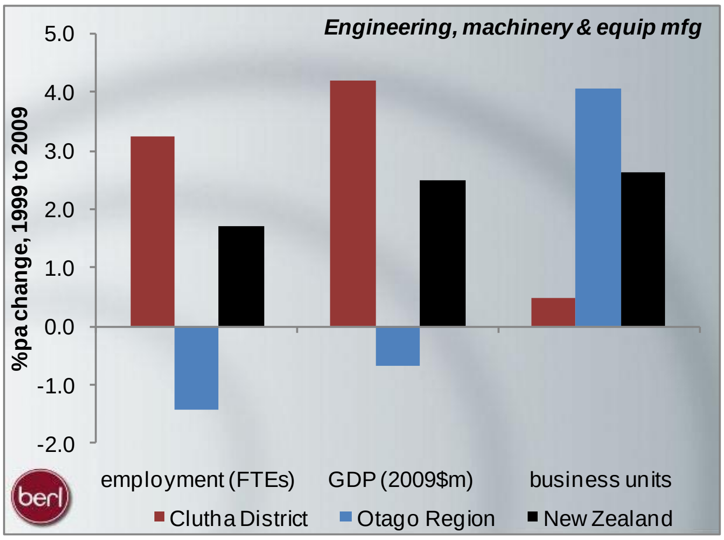
Figure 10.8 shows the change in employment, GDP and business units in the engineering, and machinery and equipment manufacturing sector in Clutha District and at a regional and national level since 1999.

Figure 10.8 Engineering, and machinery and equipment manufacturing sector growth, Clutha District, Otago Region, New Zealand



The sector has seen excellent gains in employment and GDP in the District, while business growth has been slower. This shows that most growth has been at existing businesses, suggesting strength in businesses already operating.

11 Dunedin City

- Reduced operations at the Fisher and Paykel plant resulted in significant job losses in 2009, with commensurate reductions in GDP and labour productivity.
- Long-term, Dunedin has done well, but its growth may be constrained by low population growth, which tends to suppress employment and GDP growth. While GDP per capita growth has kept up with national trends, low population growth has resulted in lower than national overall GDP growth.
- Education and research, which now employs one in eight Dunedin FTEs, has enjoyed growth in employment and GDP well above the national averages for the sector.

Table 11.1 shows the composition of the Dunedin economy as of 2009, and its role in the regional and national economies.

Table 11.1 Composition of the Dunedin economy, 2009

Sector (2009)	FTEs	%of TLA	%of Otago	%of NZ	GDP (09$m)	%of TLA	%of Otago	%of NZ	Bus. units	%of TLA	%of Otago	%of NZ
Primary	1,921	*3.8%*	*18.5%*	*1.3%*	179	*4.0%*	*21.4%*	*1.4%*	1,003	*9.1%*	*20.4%*	*1.3%*
Manufacturing	5,189	*10.4%*	*51.0%*	*2.3%*	576	*12.9%*	*48.0%*	*2.3%*	525	*4.8%*	*54.0%*	*2.2%*
Construction	3,676	*7.4%*	*44.9%*	*2.5%*	205	*4.6%*	*44.4%*	*2.5%*	1,049	*9.5%*	*36.7%*	*2.0%*
Retail and Distribution	12,160	*24.3%*	*50.8%*	*2.5%*	868	*19.5%*	*54.6%*	*2.3%*	2,416	*22.0%*	*47.5%*	*2.5%*
Business Services	8,588	*17.2%*	*63.5%*	*2.4%*	1,529	*34.4%*	*59.6%*	*2.2%*	4,098	*37.3%*	*45.3%*	*2.1%*
Recreation Services	3,697	*7.4%*	*61.5%*	*3.1%*	192	*4.3%*	*59.8%*	*3.0%*	867	*7.9%*	*46.7%*	*2.6%*
Social Services	14,742	*29.5%*	*77.9%*	*3.9%*	901	*20.2%*	*77.4%*	*3.5%*	1,027	*9.3%*	*63.1%*	*3.3%*
Totals	**49,972**	***100.0%***	***54.8%***	***2.7%***	**4,449**	***100.0%***	***54.7%***	***2.4%***	**10,985**	***100.0%***	***41.7%***	***2.1%***

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Dunedin accounted for more than half of the Otago Region's employment and GDP, and more than two-fifths of businesses. The City provided more than three-quarters of social services employment and GDP, and also had particularly large shares of business services and recreation services employment.

Table 11.2 presents the performance of Dunedin City across seven key performance indicators (KPIs) for the latest year, and compares this performance with that of the Otago Region and New Zealand.

Table 11.2 KPIs, Dunedin City, 2009

Key Performance Indicators	%pa for 2009 year **Dunedin City**	 Otago Region	 New Zealand
Resident population growth	**0.6**	0.8	1.1
Real Value Added (GDP) growth	**-3.0**	-0.5	-1.1
GDP per capita growth	**-3.5**	-1.3	-2.2
Employment growth	**-1.1**	0.8	0.7
Labour productivity growth	**-2.0**	-1.4	-1.9
Business units growth	**0.9**	1.1	0.3
Business size growth	**-2.1**	-0.3	0.3

Source: BERL, Statistics NZ

The current global downturn has not left Dunedin City unaffected. Employment fell sharply, mostly due to the reduction in machinery and equipment manufacturing, the result of Fisher and Paykel reducing operations in the City. This had a knock-on effect on GDP, GDP per capita, and even labour productivity, as manufacturing is a high productivity industry.

The BERL regional database collates data across seven KPIs over a 10-year period. These seven KPIs are listed in Table 11.3, which presents Dunedin City's performance over the decade compared to the Otago Region and New Zealand as a whole.

Table 11.3 KPIs, Dunedin City, 1999 to 2009

Key Performance Indicators	%pa for 1999-2009 **Dunedin City**	 Otago Region	 New Zealand
Resident population growth	**0.5**	1.0	1.2
Real Value Added (GDP) growth	**2.4**	3.1	3.1
GDP per capita growth	**1.9**	2.1	1.8
Employment growth	**2.1**	2.8	2.4
Productivity growth	**0.4**	0.4	0.8
Business units growth	**2.5**	3.7	3.0
Business size growth	**-0.4**	-0.9	-0.6

Source: BERL, Statistics NZ

Over the longer term, Dunedin has performed largely in line with national trends. However Dunedin's relatively low rate of population growth may be suppressing stronger economic growth. This could explain some of the differences highlighted by other indicators which show that Dunedin's results are between 0.3 percent and 0.7 percentage points lower than the national average. Despite this the City has seen slightly stronger than average growth in

GDP per capita as growth in GDP has been significantly higher than population growth. Studies by BERL suggest that, typically, at a population growth rate below five percent a year (which is an exceptionally high rate seldom achieved by any TLA in New Zealand), GDP growth will outpace population growth.

Population growth may be seen as one of the major, if not the major factor, holding employment, and therefore GDP growth, back.

11.1 Employment

Table 11.4 shows employment numbers for Dunedin City for the last three periods and the longer term. It also shows the aggregate change over the same period for New Zealand and the Otago Region.

Table 11.4 Dunedin City employment summary

	Employment Number FTEs				%pa change		
Sector	**1999**	**2007**	**2008**	**2009**	**2008**	**2009**	**1999 to 2009**
Primary	1,668	1,875	1,907	1,921	1.7	0.7	1.4
Manufacturing	6,033	6,511	6,142	5,189	-5.7	-15.5	-1.5
Construction	2,106	3,508	3,711	3,676	5.8	-0.9	5.7
Retail and Distribution	10,623	12,847	12,179	12,160	-5.2	-0.2	1.4
Business Services	5,933	7,989	8,936	8,588	11.9	-3.9	3.8
Recreation Services	2,352	3,513	3,647	3,697	3.8	1.4	4.6
Social Services	11,860	13,882	14,027	14,742	1.0	5.1	2.2
Dunedin City	**40,575**	**50,125**	**50,549**	**49,972**	**0.8**	**-1.1**	**2.1**
Otago Region	**68,939**	**89,664**	**90,440**	**91,130**	**0.9**	**0.8**	**2.8**
New Zealand	**1,473,526**	**1,840,284**	**1,854,636**	**1,866,747**	**0.8**	**0.7**	**2.4**

Source: BERL, Statistics NZ

The latest year was a challenging one, with City-wide employment falling 1.1 percent on the back of the loss of one-sixth of Dunedin's manufacturing jobs. There was some growth in social services; recreation services; and the primary sectors.[10]

Since 1999, all sectors apart from manufacturing have seen gains. Construction, led by the boom in the early half of the decade, grew 5.7 percent a year, while the wealth effect helped boost recreation services spending and therefore employment. The general trend toward a larger business services sector seen across the country was experienced in Dunedin as well. Dunedin's business services sector now accounts for 17.2 percent of employment, up from

[10] We note that the employment figures for Dunedin City also include a loss of around 260 FTEs in the printing and department store industries. These figures could not be confirmed or rejected based on information available to Dunedin City Council or ourselves.

14.6 percent in 1999. Over the same time, the figures for New Zealand rose from 17 percent to 19 percent, suggesting Dunedin is catching up.

11.2 GDP

Table 11.5 describes the GDP for Dunedin City, and compares its performance to that of New Zealand and Otago Region.

Table 11.5 Dunedin City GDP summary

	Value Added or GDP (2009$m)				%pa change		
Sector	**1999**	**2007**	**2008**	**2009**	**2008**	**2009**	**1999 to 2009**
Primary	136	181	190	179	5.4	-5.7	2.8
Manufacturing	557	712	688	576	-3.4	-16.3	0.3
Construction	116	200	216	205	8.1	-5.1	5.9
Retail and Distribution	675	899	889	868	-1.1	-2.4	2.5
Business Services	1,153	1,423	1,508	1,529	6.0	1.4	2.9
Recreation Services	124	180	190	192	5.2	1.1	4.5
Social Services	758	887	906	901	2.1	-0.6	1.7
Dunedin City	**3,519**	**4,481**	**4,586**	**4,449**	**2.3**	**-3.0**	**2.4**
Otago Region	**6,020**	**7,971**	**8,176**	**8,139**	**2.6**	**-0.5**	**3.1**
New Zealand	**136,841**	**181,968**	**187,651**	**185,554**	**3.1**	**-1.1**	**3.1**

Source: BERL, Statistics NZ

With the loss of a major manufacturing player, and the resultant decline in high labour productivity manufacturing jobs, Dunedin was hit hard in 2009. GDP slumped 3.0 percent, three times the fall seen in a national recessionary environment.

Over the 10 years to 2009, results have been rosier. Construction has again been the top performer, followed by recreation services and business services. Manufacturing GDP growth has been almost flat, taking into account the last two years, which have been particularly difficult.

11.2.1 Labour productivity

Table 11.6 presents the changes in labour productivity for Dunedin City sectors for the last 10 years, along with a national and Regional comparison.

Table 11.6 Dunedin City labour productivity summary

Sector	Productivity (2009$ per FTE)				%pa change		
	1999	2007	2008	2009	2008	2009	1999 to 2009
Primary	81,742	96,305	99,778	93,454	3.6	-6.3	1.3
Manufacturing	92,282	109,375	111,948	110,941	2.4	-0.9	1.9
Construction	55,080	56,966	58,210	55,783	2.2	-4.2	0.1
Retail and Distribution	63,567	69,956	73,018	71,404	4.4	-2.2	1.2
Business Services (#)	145,311	140,022	134,472	142,583	-4.0	6.0	-0.2
Recreation Services	52,653	51,274	51,960	51,846	1.3	-0.2	-0.2
Social Services	63,879	63,903	64,558	61,086	1.0	-5.4	-0.4
Dunedin City (#)	**79,555**	**83,335**	**84,668**	**82,950**	**1.6**	**-2.0**	**0.4**
Otago Region (#)	**80,092**	**82,863**	**84,365**	**83,210**	**1.8**	**-1.4**	**0.4**
New Zealand (#)	**85,181**	**92,168**	**94,419**	**92,607**	**2.4**	**-1.9**	**0.8**

 # excl owner-occupied dwellings sector *Source: BERL, Statistics NZ*

The average labour productivity in Dunedin is around $82,950 per FTE, just below the Regional average. The average for the City is 10 percent below that of New Zealand overall.

In the latest year, all industries except business services have seen labour productivity fall, by margins of up to 6.3 percent. This has been during a period of turmoil, as jobs are shed and industries restructure. It appears only the business services sector has managed to improve output per worker at the same time as downsizing.

Long-term, the picture is inverted, with the strong growth in business services accompanied by a loss in labour productivity per worker. This pattern is typical of a high-growth industry.

11.3 Business units and size

Table 11.7 shows the change in number of businesses within each sector in Dunedin City over the last 10 years. It also shows overall national and Regional business unit growth.

Table 11.7 Dunedin City business units summary

Sector	Business Units (number)				%pa change		
	1999	2007	2008	2009	2008	2009	1999 to 2009
Primary	1,165	1,042	1,031	1,003	-1.1	-2.7	-1.5
Manufacturing	510	544	541	525	-0.6	-3.0	0.3
Construction	679	1,016	1,054	1,049	3.7	-0.5	4.4
Retail and Distribution	2,287	2,418	2,412	2,416	-0.2	0.2	0.6
Business Services	2,337	3,800	3,954	4,098	4.1	3.6	5.8
Recreation Services	733	849	882	867	3.9	-1.7	1.7
Social Services	852	977	1,008	1,027	3.2	1.9	1.9
Dunedin City	**8,563**	**10,646**	**10,882**	**10,985**	**2.2**	**0.9**	**2.5**
Otago Region	**18,258**	**25,403**	**26,092**	**26,367**	**2.7**	**1.1**	**3.7**
New Zealand	**379,701**	**500,728**	**511,030**	**512,580**	**2.1**	**0.3**	**3.0**

Source: BERL, Statistics NZ

Despite job losses in 2009, the City saw a small increase in the number of business units, most notably in business services and social services. Business unit growth was three times the national average.

Between 1999 and 2009, business numbers surged in business services and construction. Part of this growth was the result of more employment in the industry, while in business services, many people previously employed by other companies left to start their own consultancies.

11.3.1 Business size

Table 11.8 shows the changes in average business size at the seven sector level and the City level for Dunedin, compared with national and Regional trends.

Table 11.8 Dunedin City business size summary

	Business Size (FTEs per unit)				%pa change		
Sector	**1999**	**2007**	**2008**	**2009**	**2008**	**2009**	**1999 to 2009**
Primary	1.4	1.8	1.8	1.9	2.8	3.5	2.9
Manufacturing	11.8	12.0	11.4	9.9	-5.1	-12.9	-1.8
Construction	3.1	3.5	3.5	3.5	2.0	-0.5	1.2
Retail and Distribution	4.6	5.3	5.0	5.0	-5.0	-0.3	0.8
Business Services	2.5	2.1	2.3	2.1	7.5	-7.3	-1.9
Recreation Services	3.2	4.1	4.1	4.3	-0.1	3.1	2.9
Social Services	13.9	14.2	13.9	14.4	-2.1	3.1	0.3
Dunedin City	**4.7**	**4.7**	**4.6**	**4.5**	**-1.3**	**-2.1**	**-0.4**
Otago Region	**3.8**	**3.5**	**3.5**	**3.5**	**-1.8**	**-0.3**	**-0.9**
New Zealand	**3.9**	**3.7**	**3.6**	**3.6**	**-1.3**	**0.3**	**-0.6**

Source: BERL, Statistics NZ

As mentioned previously, the picture in Dunedin was of significant reductions in employment accompanied by small gains in business numbers in 2009. The result is a sharp reduction in average business size compared to that seen Regionally or nationally.

Over the decade to 2009, business sizes have risen in all but the manufacturing and business services sectors. The dominance of the business services sector in Dunedin means that, overall, business size has declined in line with national trends.

11.4 Fastest-growing industries

Industries are compared at the 53-industry level. The analysis only covers industries that have over 50 FTEs and, for GDP, those industries earning over $4.5 million.

11.4.1 Employment

Table 11.9 presents the ten fastest growing industries in Dunedin City by FTE employment.

Table 11.9 Ten fastest growing industries by FTE growth

Rank by FTE growth	Industry	FTEs 2006	2007	2008	2009	%pa growth 2008 to 2009	2006 to 2009
1	Services to Mining	2	55	74	77	4.3	215.7
2	Sport and Recreation	715	661	747	886	18.6	7.4
3	Services to Transport	448	525	500	550	10.1	7.1
4	Business Services	4,942	5,408	6,303	5,955	-5.5	6.4
5	Air and Space Transport	59	58	56	70	24.7	6.1
6	Finance	507	601	598	603	0.8	5.9
7	Services to Finance and Insurance	390	429	464	463	-0.2	5.9
8	Other Services	1,128	1,193	1,173	1,298	10.7	4.8
9	Commercial Fishing	71	75	75	82	9.3	4.5
10	Community Services	2,190	2,124	2,242	2,458	9.6	3.9

Source: BERL, Statistics NZ

Services to mining has seen stellar growth, from just two FTEs in 2006, to 77 in 2009. There are four business units in the industry, up from one in 2006. City-wide growth is dominated by service industries including business services; finance; services to finance and insurance; other services; and community services.[11]

11.4.2 GDP

Table 11.10 presents the ten fastest growing industries by GDP growth in the three years to March 2009.

Table 11.10 Ten fastest growing industries by GDP

Rank by GDP growth	Industry	GDP (2009$m) 2006	2007	2008	2009	%pa growth 2008 to 2009	2006 to 2009
1	Finance	134	163	177	184	4.3	11.2
2	Services to Finance and Insurance	39	41	47	50	6.5	8.2
3	Services to Transport	70	80	78	87	11.1	7.7
4	Business Services	346	374	448	430	-4.0	7.5
5	Sport and Recreation	50	46	50	59	17.0	6.0
6	Motion Picture, Radio and Television Services	26	27	32	31	-3.4	5.6
7	Forestry and Logging	56	63	74	65	-12.6	4.8
8	Air and Space Transport	9	10	10	11	10.7	4.5
9	Petroleum, Coal, Chemical & Assoc Prod Mfg	23	20	22	26	14.4	4.0
10	Government Administration	166	181	186	183	-1.4	3.4

Source: BERL, Statistics NZ

[11] Other services includes religious organizations; interest groups; policing; fire services; waste disposal services; and corrective services.

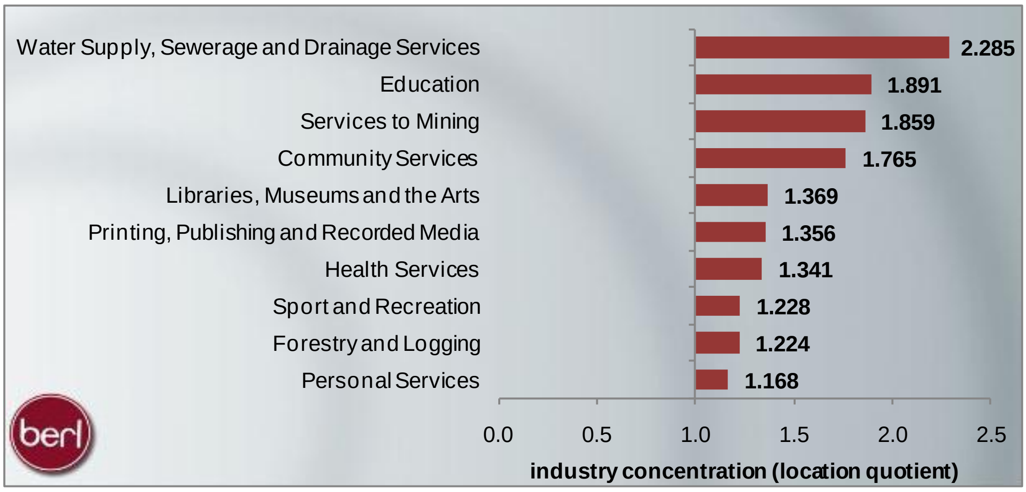
As one would expect, most of the industries on this table are the same as those on the previous table. Again, business-related services dominate growth, up between 7.5 percent and 11 percent a year since 2006.

11.5 Location quotients

This section looks at the concentration of industries in Dunedin City compared to the national average. Again the analysis is at the 53-industry level.

Figure 11.1 shows the ten industries with the highest location quotients. Because of the small numbers in some industries in Dunedin City, we only compare those industries that have at least 50 FTEs.[12]

Figure 11.1 Ten industries with the highest FTE location quotients



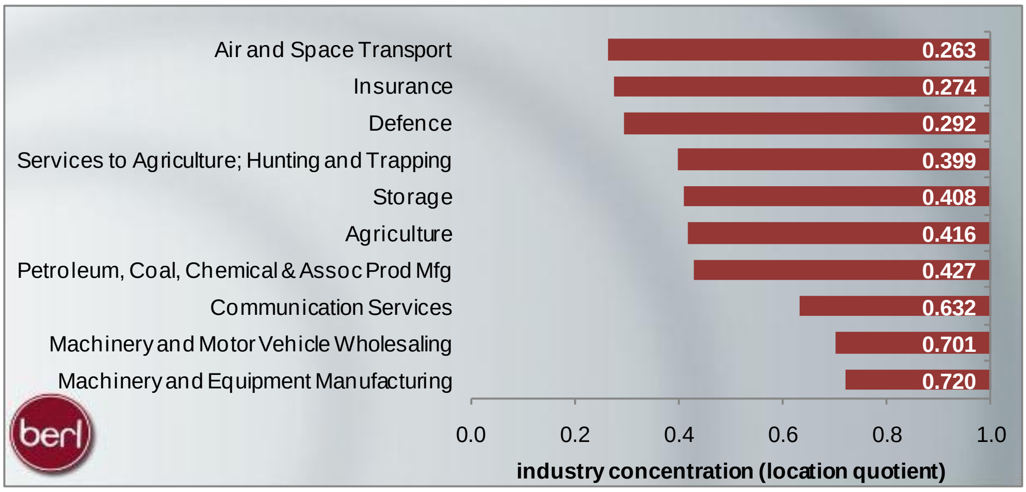
Workers in Dunedin are more than twice as likely to work in water supply, sewerage and drainage services as elsewhere in New Zealand. With the University of Otago based in Dunedin, it is unsurprising that the City has a high concentration of employment in education. The surge in services to mining employment means this industry is also highly-concentrated in the City.

As a regional centre, the City tends to have a higher concentration of employment in the tertiary sector than the predominantly rural Districts surrounding it. Nevertheless, forestry and logging is also a major industry, relatively speaking.

[12] Forty-five industries in Dunedin City employ over 50 FTEs. Four industries do not have a presence in Dunedin City – coal mining; oil and gas exploration; metal ore mining; and private households employing staff.

Figure 11.2 shows the ten industries with the lowest location quotients in the Dunedin City. In other words, these industries, while they have some representation in the City, are ones in which workers at a national level are far more likely to be employed than in the City.

Figure 11.2 Ten industries with the lowest FTE location quotients



Despite recent growth in employment and GDP in the air transport industry, Dunedin is relatively under-represented in transport and storage industries. Workers are four times less likely to be employed in air transport in the City than they are at a national level, for instance. This figure can be misleading, as Dunedin has an international airport, but it is because few air industry personnel are based there. Most fly in from Australia or other parts of the country.

The low concentrations of primary industries point to the fact that Dunedin is the major population centre in the Otago Region, with a focus on manufacturing and services rather than primary production.

11.6 Key sectors in the City

This section summarises the performance of six key sectors highlighted in the Regional Economic Development Strategy, and in our analysis of major employers in the City. The performance of each sector is assessed in terms of changes in employment, GDP, and business units. It also summarises the recent performance of the ICT sector.

11.6.1 Tourism sector

Table 11.11 presents the recent and longer-term direct contribution of tourism employment to the Dunedin City economy.

Table 11.11 Tourism employment in Dunedin City

Tourism employment (FTEs)	Years ended March 1999	2007	2008	2009	%pa change 2008 to 2009	1999 to 2009
Tourism-characteristic industries	1,381	1,788	1,621	1,637	*1.0*	*1.7*
Tourism-related industries	492	567	563	563	*-0.1*	*1.4*
All non-tourism-related industries	262	324	331	326	*-1.5*	*2.2*
Tourism sector	**2,134**	**2,680**	**2,515**	**2,526**	***0.4***	***1.7***
Total employment: Dunedin City	**40,575**	**50,125**	**50,549**	**49,972**	***-1.1***	***2.1***

BERL, Tourism Satellite Account

Table 11.12 presents the recent and longer-term direct contribution of tourism GDP to the Dunedin City economy.

Table 11.12 Tourism GDP in Dunedin City

Tourism GDP (2009$m)	Years ended March 1999	2007	2008	2009	%pa change 2008 to 2009	1999 to 2009
Tourism-characteristic industries	72	90	88	89	*0.7*	*2.1*
Tourism-related industries	22	31	31	31	*0.0*	*3.5*
All non-tourism-related industries	35	44	43	43	*1.3*	*2.2*
Tourism sector	**129**	**165**	**162**	**164**	***0.7***	***2.4***
Total GDP: Dunedin City	**3,519**	**4,482**	**4,587**	**4,448**	***-3.0***	***2.4***

BERL, Tourism Satellite Account

Table 11.13 presents the recent and longer-term direct contribution of tourism businesses to the Dunedin City economy.

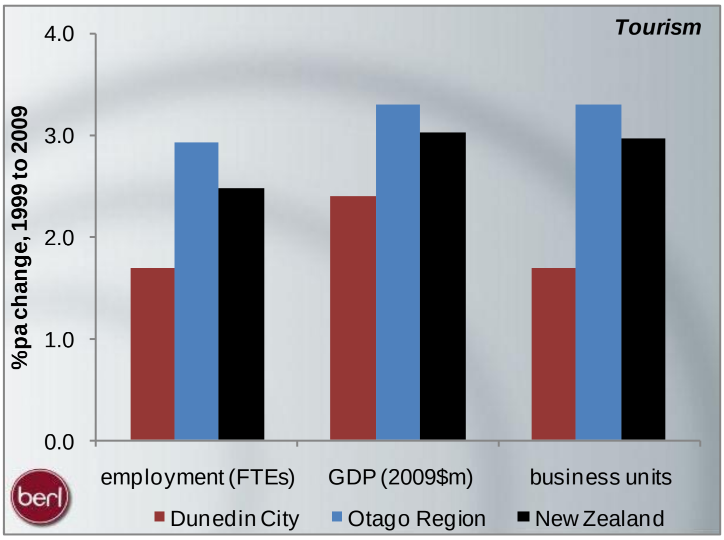
Table 11.13 Tourism businesses in Dunedin City

Tourism businesses	Years ended March 1999	2007	2008	2009	%pa change 2008 to 2009	1999 to 2009
Tourism-characteristic industries	268	332	326	328	*0.8*	*2.1*
Tourism-related industries	111	110	111	111	*-0.4*	*0.0*
All non-tourism-related industries	54	70	72	73	*1.3*	*3.0*
Tourism sector	**433**	**512**	**509**	**512**	***0.6***	***1.7***
Total business units: Dunedin City	**8,563**	**10,646**	**10,882**	**10,985**	***0.9***	***2.5***

BERL, Tourism Satellite Account

Figure 11.3 shows the change in employment, GDP and business units in the tourism sector in Dunedin City and at a regional and national level since 1999.

Figure 11.3 Tourism sector growth, Dunedin City, Otago Region, New Zealand



New Zealand has enjoyed strong growth in tourism over the last decade. Growth in Dunedin has been more moderate, but broadly in line with national trends.

11.6.2 Primary production sector

Table 11.14 presents the recent and longer-term direct contribution of primary production employment to the Dunedin City economy.

Table 11.14 Primary production employment in Dunedin City

	Year ending March				*%pa change*	
Primary production sector employment (FTEs)	**1999**	**2007**	**2008**	**2009**	***2008 to 2009***	***1999 to 2009***
Agriculture	1,215	1,323	1,260	1,260	*0.0*	*0.4*
Services to Agriculture; Hunting and Trapping	149	188	243	265	*9.2*	*5.9*
Forestry and Logging	170	201	223	206	*-7.6*	*2.0*
Commercial Fishing	84	75	75	82	*9.3*	*-0.3*
Mining and services to mining	50	89	106	107	*0.9*	*7.9*
Primary production sector	**1,668**	**1,875**	**1,907**	**1,921**	***0.7***	***1.4***
Total employment: Dunedin City	**40,575**	**50,125**	**50,549**	**49,972**	***-1.1***	***2.1***

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Table 11.15 presents the recent and longer-term direct contribution of primary production GDP to the Dunedin City economy.

Table 11.15 Primary production GDP in Dunedin City

Primary production sector GDP (2009$m)	Year ending March 1999	2007	2008	2009	%pa change 2008 to 2009	%pa change 1999 to 2009
Agriculture	76	97	91	90	*-0.5*	*1.7*
Services to Agriculture; Hunting and Trapping	7	7	9	9	*-2.2*	*2.5*
Forestry and Logging	35	63	74	65	*-12.6*	*6.5*
Commercial Fishing	7	6	5	5	*0.4*	*-2.8*
Mining and services to mining	12	8	11	10	*-7.1*	*-1.4*
Primary production sector	**136**	**181**	**190**	**179**	***-5.7***	***2.8***
Total GDP: Dunedin City	**3,519**	**4,482**	**4,587**	**4,448**	***-3.0***	***2.4***

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Table 11.16 presents the recent and longer-term direct contribution of primary production businesses to the Dunedin City economy.

Table 11.16 Primary production businesses in Dunedin City

Primary production sector business units	Year ending March 1999	2007	2008	2009	%pa change 2008 to 2009	%pa change 1999 to 2009
Agriculture	913	733	701	688	*-1.9*	*-2.8*
Services to Agriculture; Hunting and Trapping	53	92	95	93	*-2.1*	*5.8*
Forestry and Logging	130	156	168	161	*-4.2*	*2.2*
Commercial Fishing	59	49	53	49	*-7.5*	*-1.8*
Mining and services to mining	10	12	14	12	*-14.3*	*1.8*
Primary production sector	**1,165**	**1,042**	**1,031**	**1,003**	***-2.7***	***-1.5***
Total business units: Dunedin City	**8,563**	**10,646**	**10,882**	**10,985**	***0.9***	***2.5***

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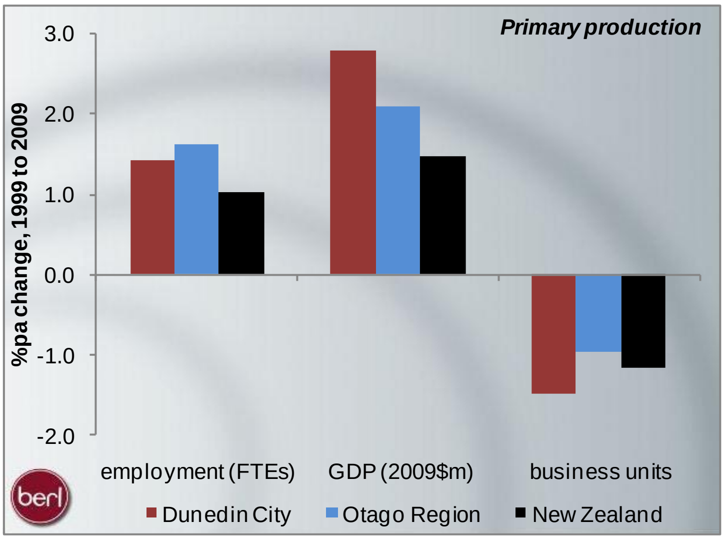
Figure 11.4 shows the change in employment, GDP and business units in the primary production sector in Dunedin City and at a regional and national level since 1999.

Figure 11.4 Primary production sector growth, Dunedin City, Otago Region, New Zealand



The sector has enjoyed better than national average growth in employment and GDP, while business units have declined at a rate slightly faster than the national average. Labour productivity has risen at around 1.4 percent a year in the District, well ahead of the national average.

11.6.3 Primary processing sector

Table 11.17 presents the recent and longer-term direct contribution of primary processing employment to the Dunedin City economy.

Table 11.17 Primary processing employment in Dunedin City

	Year ending March				%pa change	
Primary processing sector employment (FTEs)	**1999**	**2007**	**2008**	**2009**	***2008 to 2009***	***1999 to 2009***
Food, Beverage and Tobacco	1,767	1,961	1,738	1,627	*-6.4*	*-0.8*
Wood and Paper Product Manufacturing	279	496	454	433	*-4.5*	*4.5*
Primary processing sector	**2,046**	**2,457**	**2,192**	**2,061**	***-6.0***	***0.1***
Total employment: Dunedin City	**40,575**	**50,125**	**50,549**	**49,972**	***-1.1***	***2.1***

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Table 11.18 presents the recent and longer-term direct contribution of primary processing GDP to the Dunedin City economy.

Table 11.18 Primary processing GDP in Dunedin City

	Year ending March				%pa change	
Primary processing sector GDP (2009$m)	**1999**	**2007**	**2008**	**2009**	***2008 to 2009***	***1999 to 2009***
Food, Beverage and Tobacco	211	284	253	230	*-9.1*	*0.9*
Wood and Paper Product Manufacturing	30	66	66	62	*-6.3*	*7.4*
Primary processing sector	**241**	**350**	**319**	**292**	***-8.5***	***1.9***
Total GDP: Dunedin City	**3,519**	**4,482**	**4,587**	**4,448**	***-3.0***	***2.4***

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Table 11.19 presents the recent and longer-term direct contribution of primary processing businesses to the Dunedin City economy.

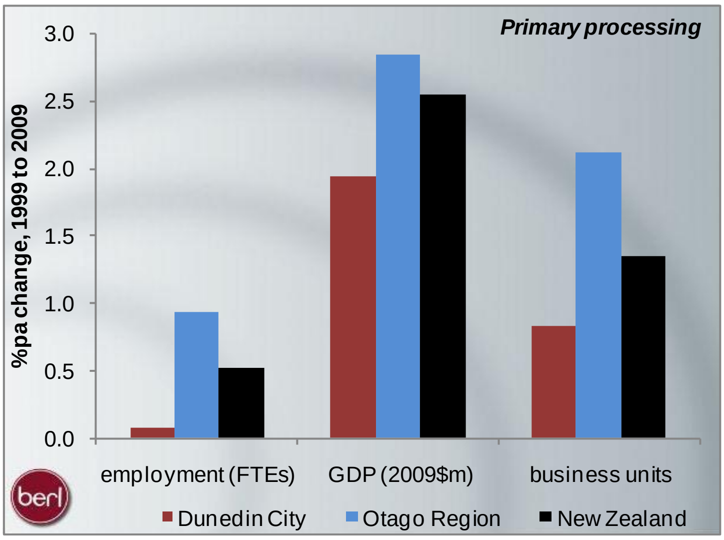
Table 11.19 Primary processing businesses in Dunedin City

	Year ending March				%pa change	
Primary processing sector business units	**1999**	**2007**	**2008**	**2009**	***2008 to 2009***	***1999 to 2009***
Food, Beverage and Tobacco	59	62	64	61	*-4.7*	*0.3*
Wood and Paper Product Manufacturing	45	52	52	52	*0.0*	*1.5*
Primary processing sector	**104**	**114**	**116**	**113**	***-2.6***	***0.8***
Total business units: Dunedin City	**8,563**	**10,646**	**10,882**	**10,985**	***0.9***	***2.5***

BERL

Figure 11.5 shows the change in employment, GDP and business units in the primary processing sector in Dunedin City and at a regional and national level since 1999.

Figure 11.5 Primary processing sector growth, Dunedin City, Otago Region, New Zealand



Employment in the sector has been almost flat since 1999 in Dunedin, while strong labour productivity gains have seen GDP grow more strongly. The number of business units has increased at a moderate rate.

11.6.4 Creative sector

Table 11.20 presents the recent and longer-term direct contribution of creative sector employment to the Dunedin City economy.

Table 11.20 Creative sector employment in Dunedin City

	Year ending March				*%pa change*	
Creative sector employment (FTEs)	**1999**	**2007**	**2008**	**2009**	***2008 to 2009***	***1999 to 2009***
Printing and publishing	764	869	797	682	*-14.4*	*-1.1*
Arts and antiques market	80	92	94	114	*21.0*	*3.6*
Commercial services	270	320	354	324	*-8.3*	*1.9*
Film, video and television services	225	226	190	168	*-11.4*	*-2.9*
Creative arts, studios and venues	133	161	184	104	*-43.6*	*-2.4*
Creative sector	**1,472**	**1,669**	**1,619**	**1,393**	***-14.0***	***-0.5***
Total employment: Dunedin City	**40,575**	**50,125**	**50,549**	**49,972**	***-1.1***	***2.1***

BERL

Table 11.21 presents the recent and longer-term direct contribution of creative sector GDP to the Dunedin City economy.

Table 11.21 Creative sector GDP in Dunedin City

Creative sector GDP (2009$m)	Year ending March 1999	2007	2008	2009	%pa change 2008 to 2009	%pa change 1999 to 2009
Printing and publishing	67	81	80	68	-14.3	0.1
Arts and antiques market	4	5	5	6	17.5	5.3
Commercial services	19	22	25	23	-6.9	1.9
Film, video and television services	26	27	23	23	-0.9	-1.3
Creative arts, studios and venues	5	6	7	4	-39.0	-1.6
Creative sector	**121**	**141**	**140**	**125**	**-10.9**	**0.3**
Total GDP: Dunedin City	**3,519**	**4,482**	**4,587**	**4,448**	**-3.0**	**2.4**

BERL

Table 11.22 presents the recent and longer-term direct contribution of creative sector businesses to the Dunedin City economy.

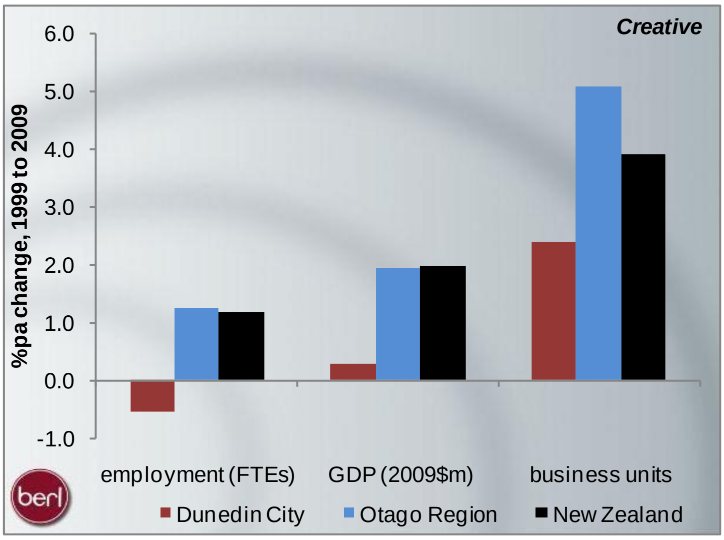
Table 11.22 Creative sector businesses in Dunedin City

Creative sector business units	Year ending March 1999	2007	2008	2009	%pa change 2008 to 2009	%pa change 1999 to 2009
Printing and publishing	42	52	42	40	-4.8	-0.5
Arts and antiques market	45	48	46	46	0.0	0.2
Commercial services	111	150	162	158	-2.5	3.6
Film, video and television services	35	46	46	45	-2.2	2.5
Creative arts, studios and venues	77	95	113	104	-8.0	3.1
Creative sector	**310**	**391**	**409**	**393**	**-3.9**	**2.4**
Total business units: Dunedin City	**8,563**	**10,646**	**10,882**	**10,985**	**0.9**	**2.5**

BERL

Figure 11.6 shows the change in employment, GDP and business units in the creative sector in Dunedin City and at a regional and national level since 1999.

Figure 11.6 Creative sector growth, Dunedin City, Otago Region, New Zealand



Employment in the sector has struggled across the decade since 1999, while productivity gains have led to some growth in GDP. The average business size has fallen as new businesses have been established even as overall employment falls.

11.6.5 Education and research sector

Table 11.23 presents the recent and longer-term direct contribution of education and research employment to the Dunedin City economy.

Table 11.23 Education and research employment in Dunedin City

	Year ending March				%pa change	
Education & research sector employment (FTEs)	**1999**	**2007**	**2008**	**2009**	***2008 to 2009***	***1999 to 2009***
Preschool Education	200	221	361	349	*-3.2*	*5.7*
Primary and Secondary Education	1,750	1,442	1,304	1,395	*6.9*	*-2.2*
Higher Education	3,070	4,495	4,523	4,621	*2.2*	*4.2*
Other Education	290	254	198	188	*-5.2*	*-4.2*
Scientific Research	270	348	303	311	*2.6*	*1.4*
Education & research sector	**5,580**	**6,761**	**6,690**	**6,864**	***2.6***	***2.1***
Total employment: Dunedin City	**40,575**	**50,125**	**50,549**	**49,972**	***-1.1***	***2.1***

BERL

Table 11.24 presents the recent and longer-term direct contribution of education and research GDP to the Dunedin City economy.

Table 11.24 Education and research GDP in Dunedin City[13]

	Year ending March				%pa change	
Education & research sector GDP (2009$m)	**1999**	**2007**	**2008**	**2009**	***2008 to 2009***	***1999 to 2009***
Preschool Education	9.9	11	19	17	*-9.9*	*5.4*
Primary and Secondary Education	86	75	67	67	*-0.5*	*-2.5*
Higher Education	152	233	233	222	*-4.9*	*3.9*
Other Education	14	13	10	9.0	*-11.8*	*-4.5*
Scientific Research	19	24	22	22	*4.2*	*1.5*
Education & research sector	**281**	**356**	**351**	**337**	***-4.0***	***1.8***
Total GDP: Dunedin City	**3,519**	**4,481**	**4,586**	**4,449**	***-3.0***	***2.4***

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Table 11.25 presents the recent and longer-term direct contribution of education and research businesses to the Dunedin City economy.

[13] Note the total for the education and research sector does not match the 53-industry level education industry total as shown in the Appendices because the compositions are different. This is because the education and research sector includes scientific research, while the education industry does not.

Table 11.25 Education and research businesses in Dunedin City

Education & research sector business units	Year ending March				%pa change	
	1999	2007	2008	2009	2008 to 2009	1999 to 2009
Preschool Education	67	69	73	73	*0.0*	*0.9*
Primary and Secondary Education	93	85	85	84	*-1.2*	*-1.0*
Higher Education	10	10	11	11	*0.0*	*1.0*
Other Education	61	76	79	82	*3.8*	*3.0*
Scientific Research	15	26	30	29	*-3.3*	*6.8*
Education & research sector	**246**	**266**	**278**	**279**	***0.4***	***1.3***
Total business units: Dunedin City	**8,563**	**10,646**	**10,882**	**10,985**	***0.9***	***2.5***

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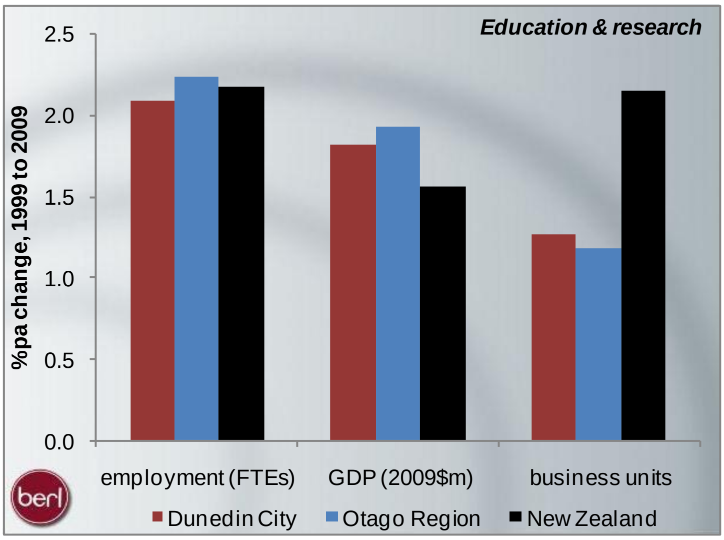
Figure 11.7 shows the change in employment, GDP and business units in the education and research sector in Dunedin City and at a regional and national level since 1999.

Figure 11.7 Education and research sector growth, Dunedin City, Otago Region, New Zealand



Growth has been broadly in line with national trends. Employment in the sector has benefited from recent strength in the education industry, while the number of business units has grown more slowly. Labour productivity has fallen as the sector has expanded rapidly.

11.6.6 Engineering, and machinery and equipment manufacturing

Table 11.26 presents the recent and longer-term direct contribution of engineering, and machinery and equipment manufacturing employment to the Dunedin City economy.

Table 11.26 Engineering, and machinery and equipment manufacturing employment in Dunedin City

Engineering, machinery & equip mfg sector employment (FTEs)	Year ending March 1999	2007	2008	2009	%pa change 2008 to 2009	1999 to 2009
Machinery and Equipment Manufacturing	1,397	1,478	1,435	868	-39.5	-4.7
Consultant Engineering Services	320	405	418	387	-7.4	1.9
Engineering, machinery & equip mfg sector	**1,717**	**1,883**	**1,853**	**1,255**	***-32.3***	***-3.1***
Total employment: Dunedin City	**40,575**	**50,125**	**50,549**	**49,972**	***-1.1***	***2.1***

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Table 11.27 presents the recent and longer-term direct contribution of engineering, and machinery and equipment manufacturing GDP to the Dunedin City economy.

Table 11.27 Engineering, and machinery and equipment manufacturing GDP in Dunedin City

Engineering, machinery & equip mfg sector GDP (2009$m)	Year ending March 1999	2007	2008	2009	%pa change 2008 to 2009	1999 to 2009
Machinery and Equipment Manufacturing	102.5	120.7	122.7	70.9	-42.3	-3.6
Consultant Engineering Services	23.0	28.0	29.7	28.0	-6.0	2.0
Engineering, machinery & equip mfg sector	**125**	**149**	**152**	**99**	***-35.2***	***-2.4***
Total GDP: Dunedin City	**3,519**	**4,482**	**4,587**	**4,448**	***-3.0***	***2.4***

BERL

Table 11.28 presents the recent and longer-term direct contribution of engineering, and machinery and equipment manufacturing businesses to the Dunedin City economy.

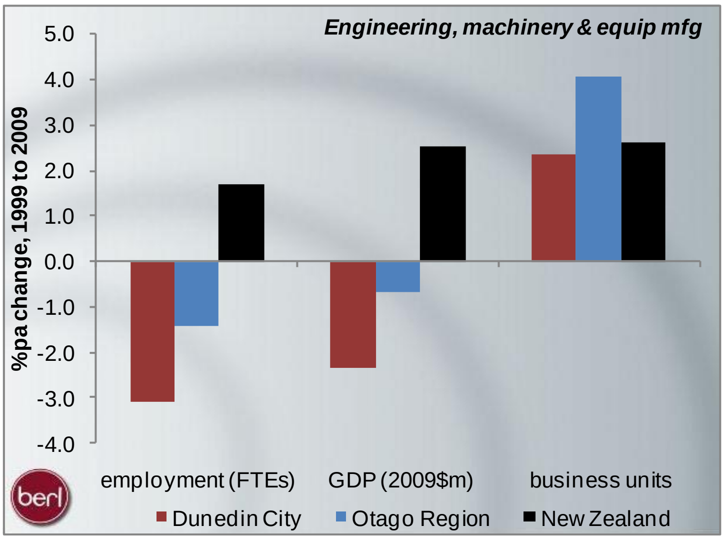
Table 11.28 Engineering, and machinery and equipment manufacturing businesses in Dunedin City

Engineering, machinery & equip mfg sector business units	Year ending March 1999	2007	2008	2009	%pa change 2008 to 2009	1999 to 2009
Machinery and Equipment Manufacturing	125	136	143	147	2.8	1.6
Consultant Engineering Services	71	105	102	100	-2.0	3.5
Engineering, machinery & equip mfg sector	**196**	**241**	**245**	**247**	***0.8***	***2.3***
Total business units: Dunedin City	**8,563**	**10,646**	**10,882**	**10,985**	***0.9***	***2.5***

BERL

Figure 11.8 shows the change in employment, GDP and business units in the engineering, and machinery and equipment manufacturing sector in Dunedin City and at a regional and national level since 1999.

Figure 11.8 Engineering, and machinery and equipment manufacturing sector growth, Dunedin City, Otago Region, New Zealand



The sector's 10-year averages have suffered as a result of the reduction in Fisher and Paykel operations in the latest year. This has turned results for employment and GDP sharply negative.

11.6.7 ICT sector

Table 11.26 presents the recent and longer-term direct contribution of ICT employment to the Dunedin City economy.

Table 11.29 ICT employment in Dunedin City

	Year ending March				%pa change	
					2008 to	*1999 to*
ICT sector employment (FTEs)	**1999**	**2007**	**2008**	**2009**	***2009***	***2009***
Manufacturing	12	11	20	29	*44.2*	*9.3*
Wholesaling	195	336	288	244	*-15.3*	*2.3*
Telecommunication services	110	43	47	48	*2.0*	*-7.9*
Commercial services	117	307	286	257	*-10.3*	*8.2*
ICT sector	**434**	**698**	**642**	**578**	***-9.9***	***2.9***
Total employment: Dunedin City	**40,575**	**50,125**	**50,549**	**49,972**	***-1.1***	***2.1***

BERL

Table 11.27 presents the recent and longer-term direct contribution of ICT GDP to the Dunedin City economy. While GDP has held up in most sub-sectors, there have been significant declines in wholesaling, led by computer wholesaling where the number of businesses in the City has fallen by half and the number of FTEs by two-thirds. This is in line with national declines in computer wholesaling GDP, although the declines have been at a more rapid rate in Dunedin.

Table 11.30 ICT GDP in Dunedin City

ICT sector GDP (2009$m)	Year ending March 1999	2007	2008	2009	%pa change 2008 to 2009	1999 to 2009
Manufacturing	0.9	0.9	1.7	2.4	*37.7*	*10.5*
Wholesaling	21.5	40.2	35.7	28.1	*-21.2*	*2.7*
Telecommunication services	23.8	18.6	20.2	22.2	*9.9*	*-0.7*
Commercial services	8.4	21.2	20.4	18.6	*-8.9*	*8.3*
ICT sector	**54.5**	**81.0**	**78.0**	**71.3**	***-8.6***	***2.7***
Total GDP: Dunedin City	**3,519**	**4,482**	**4,587**	**4,448**	***-3.0***	***2.4***

BERL

Table 11.28 presents the recent and longer-term direct contribution of ICT businesses to the Dunedin City economy.

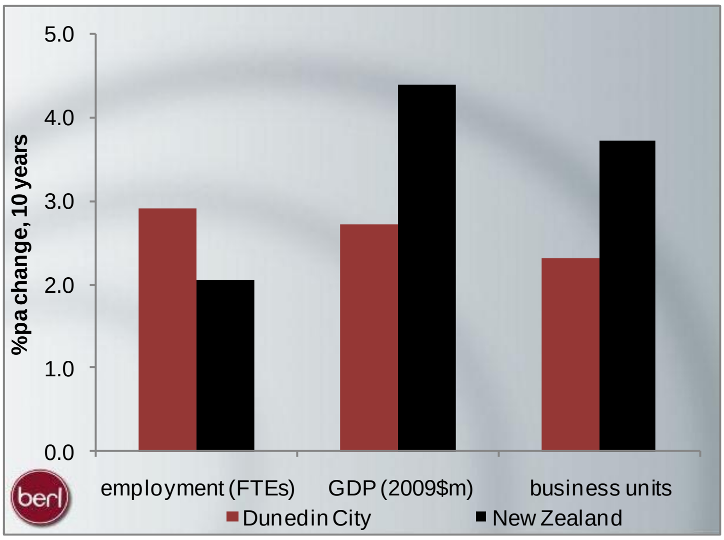
Table 11.31 ICT businesses in Dunedin City

ICT sector business units	Year ending March 1999	2007	2008	2009	%pa change 2008 to 2009	1999 to 2009
Manufacturing	6	8	9	9	*0.0*	*4.1*
Wholesaling	53	52	49	48	*-2.0*	*-1.0*
Telecommunication services	16	12	12	11	*-8.3*	*-3.7*
Commercial services	62	98	102	104	*2.0*	*5.3*
ICT sector	**137**	**170**	**172**	**172**	***0.0***	***2.3***
Total business units: Dunedin City	**8,563**	**10,646**	**10,882**	**10,985**	***0.9***	***2.5***

BERL

Figure 11.8 shows the change in employment, GDP and business units in the ICT sector in Dunedin City and at a national level since 1999.

Figure 11.9 ICT sector growth, Dunedin City, Otago Region, New Zealand



While employment in Dunedin's ICT sector has risen by almost 3.0 percent a year since 1999, GDP and business unit growth have been slower than the national averages.

12 Queenstown-Lakes District

- The Queenstown-Lakes District has been one of New Zealand's top-performing local economies over the last year and the decade.
- Growth has been spread across all sectors except the primary sector, which has remained largely flat as the District urbanises.
- Tourism accounts for 16 percent of employment, and has seen excellent growth since 1999, but is characterised by particularly low labour productivity.

Table 9.1 presents the composition of the Queenstown-Lakes District economy and its role in the regional and national economies.

Table 12.1 Composition of the Queenstown-Lakes economy, 2009

Sector (2009)	FTEs	% of TLA	% of Otago	% of NZ	GDP (09$m)	% of TLA	% of Otago	% of NZ	Bus. units	% of TLA	% of Otago	% of NZ
Primary	464	3.2%	4.5%	0.3%	34	2.7%	4.1%	0.3%	332	5.4%	6.8%	0.4%
Manufacturing	611	4.2%	6.0%	0.3%	67	5.4%	5.6%	0.3%	164	2.7%	16.9%	0.7%
Construction	1,987	13.6%	24.3%	1.3%	111	8.9%	24.0%	1.3%	1,044	16.9%	36.6%	2.0%
Retail and Distribution	6,369	43.7%	26.6%	1.3%	380	30.5%	23.9%	1.0%	1,314	21.2%	25.8%	1.3%
Business Services	2,536	17.4%	18.8%	0.7%	487	39.1%	19.0%	0.7%	2,592	41.9%	28.6%	1.3%
Recreation Services	1,511	10.4%	25.1%	1.3%	89	7.1%	27.7%	1.4%	539	8.7%	29.0%	1.6%
Social Services	1,094	7.5%	5.8%	0.3%	77	6.2%	6.7%	0.3%	201	3.2%	12.3%	0.6%
Totals	**14,572**	**100.0%**	**16.0%**	**0.8%**	**1,246**	**100.0%**	**15.3%**	**0.7%**	**6,186**	**100.0%**	**23.5%**	**1.2%**

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While the Queenstown-Lakes District forms one-sixth of regional employment and GDP, it has a far greater share of the recreation services, and retail and distribution sectors. The construction boom in the District in recent years has also lifted its share of construction employment and GDP. Businesses in the District tend to be around one-third smaller than in the Region and the country as a whole.

Table 12.2 presents the performance of the Queenstown-Lakes District across seven key performance indicators (KPIs) for the latest year, and compares this performance with that of the Otago Region and New Zealand.

Table 12.2 KPIs, Queenstown-Lakes District, 2009

Key Performance Indicators	%pa for 2009 year		
	Queenstown-Lakes District	Otago Region	New Zealand
Resident population growth	**2.7**	0.8	1.1
Real Value Added (GDP) growth	**2.6**	-0.5	-1.1
GDP per capita growth	**-0.1**	-1.3	-2.2
Employment growth	**1.1**	0.8	0.7
Labour productivity growth	**1.3**	-1.4	-1.9
Business units growth	**1.9**	1.1	0.3
Business size growth	**-0.8**	-0.3	0.3

Source: BERL, Statistics NZ

In a difficult year for the national economy, the Queenstown-Lakes District has performed well. Population growth drove continued gains in GDP and employment.

The BERL regional database collates data across seven KPIs over a 10-year period. These seven KPIs are listed in Table 12.3, which presents Queenstown-Lakes District's performance over the decade compared to the Otago Region and New Zealand as a whole.

Table 12.3 KPIs, Queenstown-Lakes District, 1999 to 2009

Key Performance Indicators	%pa for 1999-2009		
	Queenstown-Lakes District	Otago Region	New Zealand
Resident population growth	**5.4**	1.0	1.2
Real Value Added (GDP) growth	**7.6**	3.1	3.1
GDP per capita growth	**2.2**	2.1	1.8
Employment growth	**7.1**	2.8	2.4
Productivity growth	**0.7**	0.4	0.8
Business units growth	**9.7**	3.7	3.0
Business size growth	**-2.4**	-0.9	-0.6

Source: BERL, Statistics NZ

Over the decade since 1999, the Queenstown-Lakes District has enjoyed blistering growth in population, GDP, employment and business numbers. Despite the rapid pace of development, labour productivity gains have remained largely in line with national trends. With business numbers rising 2.6 percentage points a year faster than employment, business size has fallen particularly fast in the District.

12.1 Employment

Table 12.4 shows employment numbers for Queenstown-Lakes District for the last three periods and the longer term. It also shows the aggregate change over the same period for New Zealand and the Otago Region.

Table 12.4 Queenstown-Lakes District employment summary

	Employment Number FTEs				%pa change		
Sector	**1999**	**2007**	**2008**	**2009**	**2007 to 2008**	**2008 to 2009**	**1999 to 2009**
Primary	435	523	434	464	-16.9	6.7	0.6
Manufacturing	280	538	543	611	0.8	12.5	8.1
Construction	614	2,052	2,114	1,987	3.0	-6.0	12.5
Retail and Distribution	3,831	6,415	6,320	6,369	-1.5	0.8	5.2
Business Services	967	2,501	2,492	2,536	-0.4	1.8	10.1
Recreation Services	704	1,685	1,542	1,511	-8.5	-2.0	7.9
Social Services	504	775	965	1,094	24.5	13.4	8.1
Queenstown-Lakes District	**7,335**	**14,489**	**14,411**	**14,572**	**-0.5**	**1.1**	**7.1**
Otago Region	**68,939**	**89,664**	**90,440**	**91,130**	**0.9**	**0.8**	**2.8**
New Zealand	**1,473,526**	**1,840,284**	**1,854,636**	**1,866,747**	**0.8**	**0.7**	**2.4**

Source: BERL, Statistics NZ

Employment in the District has doubled since 1999, and rebounded in 2009 from a poor 2008, even as growth slipped nationally. The rapid growth of the District's population (and resultant urbanisation, even if that urbanisation is occupation of lifestyle blocks) may be the reason only the primary sector has seen slower employment growth than the country and Region since 1999. Employment in all other industries apart from retail and distribution has more than doubled since 1999.

12.2 GDP

Table 12.5 describes the GDP for Queenstown-Lakes District, and compares its performance to that of New Zealand and the Otago Region.

Table 12.5 Queenstown-Lakes District GDP summary

	Value Added or GDP (2009$m)				%pa change		
Sector	1999	2007	2008	2009	2007 to 2008	2008 to 2009	1999 to 2009
Primary	33	37	31	34	-15.6	9.3	0.3
Manufacturing	26	58	62	67	6.5	7.5	10.0
Construction	34	117	123	111	4.8	-9.5	12.4
Retail and Distribution	216	374	380	380	1.5	0.2	5.8
Business Services	206	442	452	487	2.3	7.7	9.0
Recreation Services	45	108	94	89	-12.6	-5.9	7.1
Social Services	35	53	72	77	34.5	8.1	8.1
Queenstown-Lakes District	**596**	**1,190**	**1,214**	**1,246**	**2.0**	**2.6**	**7.6**
Otago Region	**6,020**	**7,971**	**8,176**	**8,139**	**2.6**	**-0.5**	**3.1**
New Zealand	**136,841**	**181,968**	**187,651**	**185,554**	**3.1**	**-1.1**	**3.1**

Source: BERL, Statistics NZ

Over the last two years, GDP growth across the sectors has been mixed, but since 1999, the economy has trended strongly upward. Only the primary sector has seen slower than average national growth, with several sectors more than doubling in size in 10 years.

Notably, the construction boom of the early 2000s ensured a 12 percent a year growth rate in that sector to 2009. However, as the latest figures show, the slowdown in the housing market and a number of development projects that have failed to progress have seen construction GDP slip.

12.2.1 Labour productivity

Table 12.6 presents the changes in labour productivity for Queenstown-Lakes District sectors for the last 10 years, along with a national and Regional comparison.

Table 12.6 Queenstown-Lakes District labour productivity summary

	Productivity (2009$ per FTE)				%pa change		
Sector	1999	2007	2008	2009	2008	2009	1999 to 2009
Primary	76,044	70,740	71,825	73,557	1.5	2.4	-0.3
Manufacturing	92,012	108,505	114,602	109,508	5.6	-4.4	1.8
Construction	55,979	57,050	58,016	55,850	1.7	-3.7	0.0
Retail and Distribution	56,474	58,264	60,049	59,713	3.1	-0.6	0.6
Business Services (#)	162,204	144,460	148,963	158,471	3.1	6.4	-0.2
Recreation Services	63,818	64,105	61,193	58,782	-4.5	-3.9	-0.8
Social Services	70,254	68,761	74,277	70,770	8.0	-4.7	0.1
Queenstown-Lakes District (#)	**74,540**	**76,530**	**78,611**	**79,636**	**2.7**	**1.3**	**0.7**
Otago Region (#)	**80,092**	**82,863**	**84,365**	**83,210**	**1.8**	**-1.4**	**0.4**
New Zealand (#)	**85,181**	**92,168**	**94,419**	**92,607**	**2.4**	**-1.9**	**0.8**

 # excl owner-occupied dwellings sector

Source: BERL, Statistics NZ

Despite the strength of the Queenstown-Lakes District economy, it has a relatively low labour productivity per FTE. The main reason for this is the dominance of the tourism industry (16 percent of employment), which has an average labour productivity of $56,530. Although this figure is not shown explicitly on the table, the tourism industry is made up mostly of retail and distribution and recreation services constituent industries, which, as the table does show, have lower labour productivities.

12.3 Business units and size

Table 12.7 shows the change in the number of businesses within each sector in the Queenstown-Lakes District over the last 10 years. It also shows overall national and Regional business unit growth.

Table 12.7 Queenstown-Lakes District business units summary

	Business Units (number)				%pa change		
Sector	**1999**	**2007**	**2008**	**2009**	**2007 to 2008**	**2008 to 2009**	**1999 to 2009**
Primary	344	370	340	332	-8.1	-2.4	-0.4
Manufacturing	95	178	169	164	-5.1	-3.0	5.6
Construction	251	943	1,021	1,044	8.3	2.3	15.3
Retail and Distribution	741	1,264	1,302	1,314	3.0	0.9	5.9
Business Services	693	2,300	2,526	2,592	9.8	2.6	14.1
Recreation Services	233	503	531	539	5.6	1.5	8.7
Social Services	92	174	182	201	4.6	10.4	8.1
Queenstown-Lakes District	**2,449**	**5,732**	**6,071**	**6,186**	**5.9**	**1.9**	**9.7**
Otago Region	**18,258**	**25,403**	**26,092**	**26,367**	**2.7**	**1.1**	**3.7**
New Zealand	**379,701**	**500,728**	**511,030**	**512,580**	**2.1**	**0.3**	**3.0**

Source: BERL, Statistics NZ

Business unit rises have outpaced even the rapid inclines in employment and GDP seen in the District. Even in the slower year of 2009, the number of businesses rose by 115, or 1.9 percent, while national growth was almost flat.

Since 1999, all sectors other than primary have seen the number of businesses grow, by up to 15 percent. Worth noting is that even as employment and GDP declined in construction in 2009, the number of businesses in the sector continued to rise.

12.3.1 Business size

Table 12.8 shows the changes in average business size at the seven sector level and the District level for Otago, compared with national and Regional trends.

Table 12.8 Queenstown-Lakes District business size summary

	Business Size (FTEs per unit)				%pa change		
Sector	1999	2007	2008	2009	2007 to 2008	2008 to 2009	1999 to 2009
Primary	1.3	1.4	1.3	1.4	-9.6	9.3	1.0
Manufacturing	2.9	3.0	3.2	3.7	6.2	16.0	2.4
Construction	2.4	2.2	2.1	1.9	-4.8	-8.1	-2.5
Retail and Distribution	5.2	5.1	4.9	4.8	-4.4	-0.1	-0.6
Business Services	1.4	1.1	1.0	1.0	-9.3	-0.8	-3.5
Recreation Services	3.0	3.3	2.9	2.8	-13.3	-3.5	-0.7
Social Services	5.5	4.5	5.3	5.4	19.0	2.7	-0.1
Queenstown-Lakes District	**3.0**	**2.5**	**2.4**	**2.4**	**-6.1**	**-0.8**	**-2.4**
Otago Region	**3.8**	**3.5**	**3.5**	**3.5**	**-1.8**	**-0.3**	**-0.9**
New Zealand	**3.9**	**3.7**	**3.6**	**3.6**	**-1.3**	**0.3**	**-0.6**

Source: BERL, Statistics NZ

Coupling employment and business unit growth figures yields results that show a decline in average business size far stronger than the national or Regional averages across all years considered. In 2009, as businesses began to consolidate country-wide, continued growth in Queenstown-Lakes District spurred the reduction in business size as many people still chose to set up their own businesses.

Ten years of better than average economic growth have seen this pattern repeated on an even larger scale. The average business in Queenstown-Lakes District employs 1.2 FTEs fewer than in New Zealand overall, up from a difference of 0.9 FTEs in 1999.

12.4 Fastest-growing industries

Industries are compared at the 53-industry level. The analysis only covers industries that have over 25 FTEs and, for GDP, those industries earning over $2.25 million.

12.4.1 Employment

Table 12.9 presents the ten fastest growing industries in Queenstown-Lakes District by FTE employment.

Table 12.9 Ten fastest growing industries by FTE growth

Rank by FTE growth	Industry	FTEs				%pa growth	
		2006	2007	2008	2009	2008 to 2009	2006 to 2009
1	Government Administration	67	77	170	196	15.6	43.3
2	Services to Finance and Insurance	44	73	95	88	-8.1	25.8
3	Printing, Publishing and Recorded Media	104	120	112	181	61.4	20.2
4	Metal Product Manufacturing	38	38	44	57	28.1	14.2
5	Finance	218	269	293	310	5.7	12.5
6	Health Services	269	272	305	347	13.6	8.8
7	Education	370	353	416	472	13.4	8.4
8	Community Services	64	73	74	80	8.0	7.7
9	Communication Services	44	34	44	55	25.3	7.4
10	Machinery and Motor Vehicle Wholesaling	63	61	73	77	6.3	7.1

Source: BERL, Statistics NZ

Strong growth in local government services over the last three years put it at the top of the table. A range of other business and social services have also seen exponential growth, which is typical of an economy seeing a large rise in population. Finance, insurance, health, education, community and communication services have been among the largest gainers.

12.4.2 GDP

Table 12.10 presents the ten fastest growing industries by GDP growth in the three years to March 2009.

Table 12.10 Ten fastest growing industries by GDP

Rank by GDP growth	Industry	GDP (2009$m)				%pa growth	
		2006	2007	2008	2009	2008 to 2009	2006 to 2009
1	Government Administration	8.7	10	24	26	8.9	43.6
2	Services to Finance and Insurance	4.4	7.1	10	9.4	-1.9	28.5
3	Printing, Publishing and Recorded Media	9.1	11	11	18	61.5	25.6
4	Petroleum, Coal, Chemical & Assoc Prod Mfg	1.4	1.1	1.9	2.3	19.9	18.5
5	Finance	57	73	86	95	9.3	18.1
6	Insurance	1.5	1.4	2.3	2.3	0.4	15.7
7	Communication Services	17	15	19	25	35.1	14.7
8	Metal Product Manufacturing	3.9	3.8	4.5	5.2	15.9	10.2
9	Health Services	20	21	24	26	10.4	8.9
10	Machinery and Motor Vehicle Wholesaling	7.3	7.4	9.0	8.9	-1.0	6.7

Source: BERL, Statistics NZ

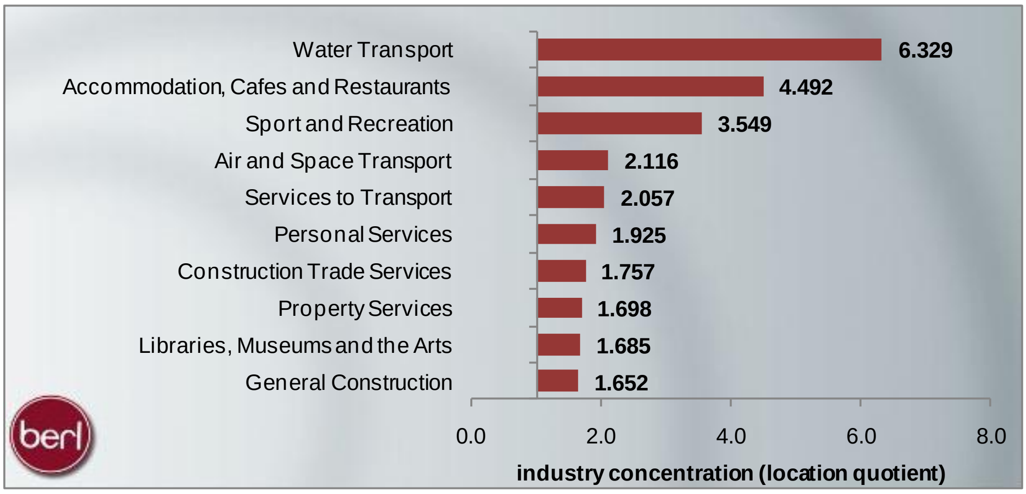
The picture for GDP growth is similar to that for employment growth, as the latter usually drives the former. Again, government administration leads out, followed by several business service industries. Of interest is that three manufacturing industries also make the list, with printing, publishing, and recorded media being particularly sizeable.

12.5 Location quotients

This section looks at the concentration of industries in Queenstown-Lakes District compared to the national average. Again the analysis is at the 53-industry level.

Figure 12.1 shows the ten industries with the highest location quotients. Because of the small numbers in some industries in Queenstown-Lakes District, we only compare those industries that have at least 25 FTEs.[14]

Figure 12.1 Ten industries with the highest FTE location quotients



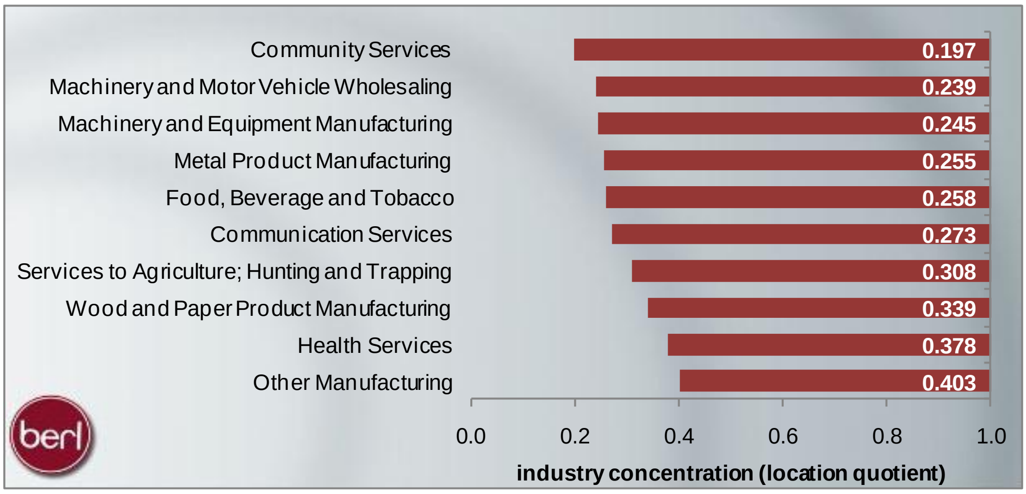
The Queenstown-Lakes District's tourism focus is clearly borne out by the list of industries most concentrated in the District. Transport of various kinds; accommodation, cafés and restaurants; and sport and recreation dominate the list. For instance, workers in the District are 4.5 times more likely to work in accommodation, cafés and restaurants than in New Zealand overall.

The rapid rises in population and holiday home developments have ensured that construction industries are also represented well above the national average level of employment.

Figure 12.2 shows the ten industries with the lowest location quotients in the Queenstown-Lakes District. In other words, these industries, while they have some representation in the District, are ones in which workers at a national level are far more likely to be employed than in the District.

[14] Forty-eight industries in the Queenstown-Lakes District employ over 25 FTEs. Five industries do not have a presence in the Queenstown-Lakes District – coal mining; oil and gas exploration; rail transport; defence; and private households employing staff.

Figure 12.2 Ten industries with the lowest FTE location quotients



Manufacturing, primary industries, and utilities tend to be under-represented in the District as a result of its tourism-orientation. For instance, workers are four times less likely to be employed in machinery and equipment manufacturing than they would be across New Zealand.

12.6 Key sectors in the District

This chapter summarises the performance of six key sectors highlighted in the Economic Development Strategy for the Otago Region, and in our analysis of major employers in the District. The performance of each sector is assessed in terms of changes in employment, GDP, and business units.

12.6.1 Tourism sector

Table 12.11 presents the recent and longer-term direct contribution of tourism employment to the Queenstown-Lakes District economy.

Table 12.11 Tourism employment in Queenstown-Lakes District

	Years ended March				*%pa change*	
Tourism employment (FTEs)	**1999**	**2007**	**2008**	**2009**	***2008 to 2009***	***1999 to 2009***
Tourism-characteristic industries	1,332	2,189	2,118	2,069	*-2.3*	*4.5*
Tourism-related industries	108	197	195	202	*3.7*	*6.5*
All non-tourism-related industries	27	61	62	64	*2.1*	*9.0*
Tourism sector	**1,467**	**2,447**	**2,375**	**2,335**	***-1.7***	***4.8***
Total employment: Queenstown-Lakes District	**7,335**	**14,489**	**14,411**	**14,572**	***1.1***	***7.1***

BERL, Tourism Satellite Account

Table 12.12 presents the recent and longer-term direct contribution of tourism GDP to the Queenstown-Lakes District economy.

Table 12.12 Tourism GDP in Queenstown-Lakes District

Tourism GDP (2009$m)	Years ended March				%pa change	
					2008 to	1999 to
	1999	2007	2008	2009	2009	2009
Tourism-characteristic industries	70	111	108	107	-0.7	4.3
Tourism-related industries	5	11	11	11	0.0	8.5
All non-tourism-related industries	6	13	14	14	1.3	8.2
Tourism sector	**81**	**135**	**132**	**132**	**-0.4**	**5.0**
Total GDP: Queenstown-Lakes District	**596**	**1,190**	**1,214**	**1,246**	**2.6**	**7.6**

BERL, Tourism Satellite Account

Table 12.13 presents the recent and longer-term direct contribution of tourism businesses to the Queenstown-Lakes District economy.

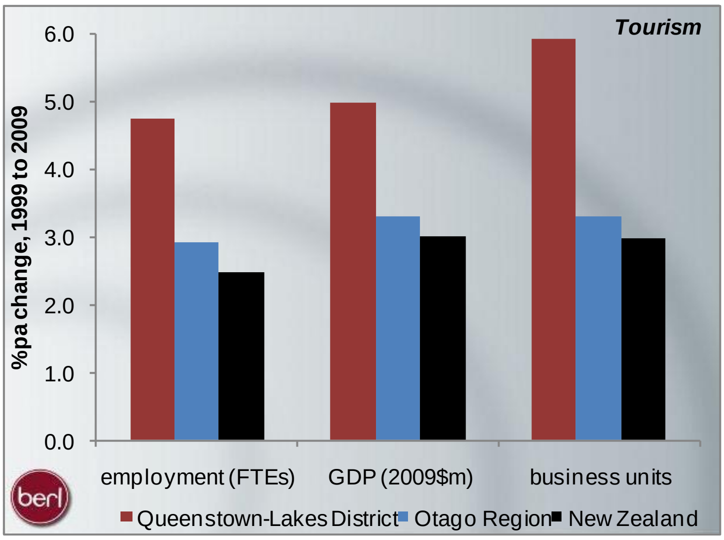
Table 12.13 Tourism businesses in Queenstown-Lakes District

Tourism businesses	Years ended March				%pa change	
					2008 to	1999 to
	1999	2007	2008	2009	2009	2009
Tourism-characteristic industries	217	361	371	372	0.2	5.5
Tourism-related industries	27	44	45	46	2.7	5.5
All non-tourism-related industries	13	36	38	39	2.2	11.3
Tourism sector	**257**	**441**	**454**	**457**	**0.7**	**5.9**
Total business units: Queenstown-Lakes District	**2,449**	**5,732**	**6,071**	**6,186**	**1.9**	**9.7**

BERL, Tourism Satellite Account

Figure 12.3 shows the change in employment, GDP and business units in the tourism sector in Queenstown-Lakes District and at a regional and national level since 1999.

Figure 12.3 Tourism sector growth, Queenstown-Lakes District, Otago Region, New Zealand



As one of the country's major tourism attractions, the District has seen solid growth across all indicators since 1999, with growth rates of between 4.8 percent and 5.9 percent a year.

12.6.2 *Primary production sector*

Table 12.14 presents the recent and longer-term direct contribution of primary production employment to the Queenstown-Lakes District economy.

Table 12.14 Primary production employment in Queenstown-Lakes District

	Year ending March				%pa change	
Primary production sector employment (FTEs)	**1999**	**2007**	**2008**	**2009**	***2008 to 2009***	***1999 to 2009***
Agriculture	365	380	354	379	*7.1*	*0.4*
Services to Agriculture; Hunting and Trapping	28	126	66	60	*-9.3*	*7.9*
Forestry and Logging	15	10	2	6	*142.5*	*-8.9*
Commercial Fishing	6	2	6	6	*3.4*	*-0.5*
Mining and services to mining	21	4	6	13	*99.9*	*-4.9*
Primary production sector	**435**	**523**	**434**	**464**	***6.7***	***0.6***
Total employment: Queenstown-Lakes District	**7,335**	**14,489**	**14,411**	**14,572**	***1.1***	***7.1***

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Table 12.15 presents the recent and longer-term direct contribution of primary production GDP to the Queenstown-Lakes District economy.

Table 12.15 Primary production GDP in Queenstown-Lakes District

	Year ending March				%pa change	
Primary production sector GDP (2009$m)	**1999**	**2007**	**2008**	**2009**	***2008 to 2009***	***1999 to 2009***
Agriculture	22.9	27.9	25.5	27.2	*6.5*	*1.7*
Services to Agriculture; Hunting and Trapping	1.3	4.6	2.4	2.0	*-18.8*	*4.4*
Forestry and Logging	3.0	3.2	0.8	1.9	*129.4*	*-4.8*
Commercial Fishing	0.5	0.2	0.4	0.4	*-5.0*	*-3.0*
Mining and services to mining	5.4	1.1	2.1	2.7	*31.9*	*-6.6*
Primary production sector	**33.0**	**37.0**	**31.2**	**34.1**	***9.3***	***0.3***
Total GDP: Queenstown-Lakes District	**596**	**1,190**	**1,214**	**1,246**	***2.6***	***7.6***

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Table 12.16 presents the recent and longer-term direct contribution of primary production businesses to the Queenstown-Lakes District economy.

Table 12.16 Primary production businesses in Queenstown-Lakes District

	Year ending March				%pa change	
Primary production sector business units	**1999**	**2007**	**2008**	**2009**	***2008 to 2009***	***1999 to 2009***
Agriculture	298	267	244	234	*-4.1*	*-2.4*
Services to Agriculture; Hunting and Trapping	18	60	57	57	*0.0*	*12.2*
Forestry and Logging	17	26	25	22	*-12.0*	*2.6*
Commercial Fishing	2	8	6	7	*16.7*	*13.3*
Mining and services to mining	9	9	8	12	*50.0*	*2.9*
Primary production sector	**344**	**370**	**340**	**332**	***-2.4***	***-0.4***
Total business units: Queenstown-Lakes District	**2,449**	**5,732**	**6,071**	**6,186**	***1.9***	***9.7***

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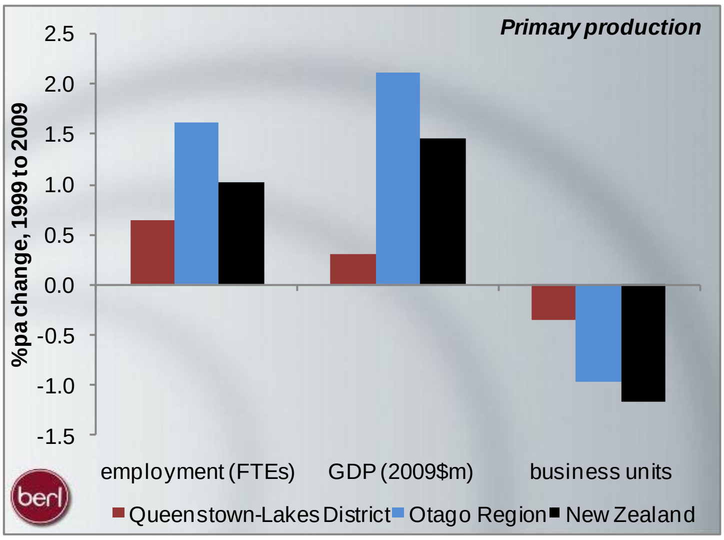
Figure 12.4 shows the change in employment, GDP and business units in the primary production sector in Queenstown-Lakes District and at a regional and national level since 1999.

Figure 12.4 Primary production sector growth, Queenstown-Lakes District, Otago Region, New Zealand



The primary production sector is the one sector that has battled in the District. This is as the population of the District grows and urbanisation and the popularity of lifestyle blocks has led to a decline in primary activity. While employment and GDP have grown moderately, the number of businesses has fallen.

12.6.3 Primary processing sector

Table 12.17 presents the recent and longer-term direct contribution of primary processing employment to the Queenstown-Lakes District economy.

Table 12.17 Primary processing employment in Queenstown-Lakes District

	Year ending March				*%pa change*	
Primary processing sector employment (FTEs)	**1999**	**2007**	**2008**	**2009**	***2008 to 2009***	***1999 to 2009***
Food, Beverage and Tobacco	50	111	134	133	*-0.6*	*10.3*
Wood and Paper Product Manufacturing	48	75	56	55	*-1.7*	*1.4*
Primary processing sector	**98**	**186**	**190**	**188**	***-1.0***	***6.7***
Total employment: Queenstown-Lakes District	**7,335**	**14,489**	**14,411**	**14,572**	***1.1***	***7.1***

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Table 12.18 presents the recent and longer-term direct contribution of primary processing GDP to the Queenstown-Lakes District economy.

Table 12.18 Primary processing GDP in Queenstown-Lakes District

	Year ending March				%pa change	
Primary processing sector GDP (2009$m)	1999	2007	2008	2009	*2008 to 2009*	*1999 to 2009*
Food, Beverage and Tobacco	6.0	16.1	19.5	18.8	*-3.5*	*12.2*
Wood and Paper Product Manufacturing	5.2	10.0	8.2	7.9	*-3.5*	*4.2*
Primary processing sector	**11.2**	**26.1**	**27.7**	**26.7**	***-3.5***	***9.1***
Total GDP: Queenstown-Lakes District	**596**	**1,190**	**1,214**	**1,246**	***2.6***	***7.6***

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Table 12.19 presents the recent and longer-term direct contribution of primary processing businesses to the Queenstown-Lakes District economy.

Table 12.19 Primary processing businesses in Queenstown-Lakes District

	Year ending March				%pa change	
Primary processing sector business units	1999	2007	2008	2009	*2008 to 2009*	*1999 to 2009*
Food, Beverage and Tobacco	11	27	28	26	*-7.1*	*9.0*
Wood and Paper Product Manufacturing	15	22	21	17	*-19.0*	*1.3*
Primary processing sector	**26**	**49**	**49**	**43**	***-12.2***	***5.2***
Total business units: Queenstown-Lakes District	**2,449**	**5,732**	**6,071**	**6,186**	***1.9***	***9.7***

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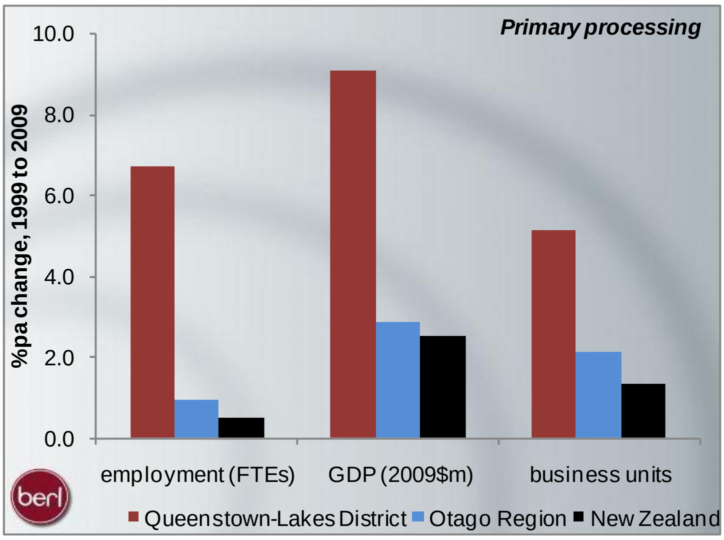
Figure 12.5 shows the change in employment, GDP and business units in the primary processing sector in Queenstown-Lakes District and at a regional and national level since 1999.

Figure 12.5 Primary processing sector growth, Queenstown-Lakes District, Otago Region, New Zealand



The District has seen exceptional growth of between 5.2 percent and 9.1 percent growth per year across indicators for the sector. Large labour productivity gains of about 2.4 percent per year have been recorded, well above national gains.

12.6.4 Creative sector

Table 12.20 presents the recent and longer-term direct contribution of creative sector employment to the Queenstown-Lakes District economy.

Table 12.20 Creative sector employment in Queenstown-Lakes District

	Year ending March				%pa change	
Creative sector employment (FTEs)	**1999**	**2007**	**2008**	**2009**	***2008 to 2009***	***1999 to 2009***
Printing and publishing	45	120	112	181	*61.4*	*14.9*
Arts and antiques market	12	14	14	14	*4.4*	*1.9*
Commercial services	72	174	193	192	*-0.4*	*10.4*
Film, video and television services	48	105	93	20	*-78.2*	*-8.2*
Creative arts, studios and venues	43	94	47	71	*53.4*	*5.2*
Creative sector	**220**	**508**	**459**	**480**	***4.5***	***8.1***
Total employment: Queenstown-Lakes District	**7,335**	**14,489**	**14,411**	**14,572**	***1.1***	***7.1***

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Table 12.21 presents the recent and longer-term direct contribution of creative sector GDP to the Queenstown-Lakes District economy.

Table 12.21 Creative sector GDP in Queenstown-Lakes District

	Year ending March				%pa change	
Creative sector GDP (2009$m)	**1999**	**2007**	**2008**	**2009**	***2008 to 2009***	***1999 to 2009***
Printing and publishing	4.0	11.2	11.2	18.1	*61.5*	*16.4*
Arts and antiques market	0.5	0.8	0.8	0.8	*1.4*	*3.6*
Commercial services	5.2	12.0	13.7	13.9	*1.1*	*10.4*
Film, video and television services	5.5	12.5	11.3	2.8	*-75.6*	*-6.8*
Creative arts, studios and venues	1.8	4.3	1.6	3.3	*111.0*	*6.3*
Creative sector	**17.0**	**40.7**	**38.6**	**38.9**	***0.8***	***8.6***
Total GDP: Queenstown-Lakes District	**596**	**1,190**	**1,214**	**1,246**	***2.6***	***7.6***

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Table 12.22 presents the recent and longer-term direct contribution of creative sector businesses to the Queenstown-Lakes District economy.

Table 12.22 Creative sector businesses in Queenstown-Lakes District

	Year ending March				%pa change	
Creative sector business units	**1999**	**2007**	**2008**	**2009**	***2008 to 2009***	***1999 to 2009***
Printing and publishing	11	17	18	19	*5.6*	*5.6*
Arts and antiques market	9	8	6	2	*-66.7*	*-14.0*
Commercial services	40	110	126	121	*-4.2*	*11.8*
Film, video and television services	22	70	73	70	*-4.1*	*12.3*
Creative arts, studios and venues	34	69	73	77	*5.5*	*8.5*
Creative sector	**116**	**274**	**296**	**289**	***-2.4***	***9.6***
Total business units: Queenstown-Lakes District	**2,449**	**5,732**	**6,071**	**6,186**	***1.9***	***9.7***

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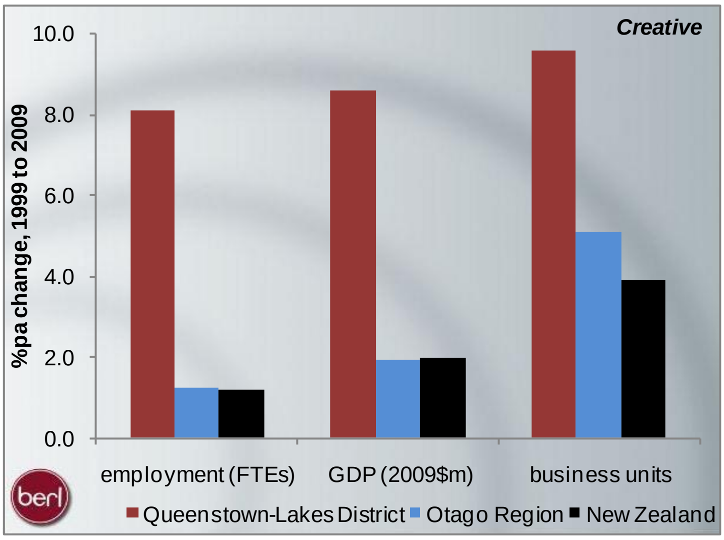
Figure 12.6 shows the change in employment, GDP and business units in the creative sector in Queenstown-Lakes District and at a regional and national level since 1999.

Figure 12.6 Creative sector growth, Queenstown-Lakes District, Otago Region, New Zealand



The creative sector has enjoyed remarkable growth in the District since 1999, averaging between 8.1 percent and 9.6 percent across the indicators, or around three times the national average increases.

12.6.5 Education and research sector

Table 12.23 presents the recent and longer-term direct contribution of education and research employment to the Queenstown-Lakes District economy.

Table 12.23 Education and research employment in Queenstown-Lakes District

	Year ending March				*%pa change*	
Education & research sector employment (FTEs)	**1999**	**2007**	**2008**	**2009**	***2008 to 2009***	***1999 to 2009***
Preschool Education	35	54	92	125	*36.8*	*13.6*
Primary and Secondary Education	160	218	241	262	*8.6*	*5.0*
Higher Education	0	33	33	27	*-16.9*	*na*
Other Education	20	47	51	58	*13.1*	*11.2*
Scientific Research	0	0	0	0	*na*	*na*
Education & research sector	**215**	**353**	**416**	**472**	***13.4***	***8.2***
Total employment: Queenstown-Lakes District	**7,335**	**14,489**	**14,411**	**14,572**	***1.1***	***7.1***

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Table 12.24 presents the recent and longer-term direct contribution of education and research GDP to the Queenstown-Lakes District economy.

Table 12.24 Education and research GDP in Queenstown-Lakes District

Education & research sector GDP (2009$m)	Year ending March 1999	2007	2008	2009	%pa change 2008 to 2009	1999 to 2009
Preschool Education	1.9	3.1	4.8	6.2	*27.3*	*12.7*
Primary and Secondary Education	8.5	12	13	13	*1.0*	*4.2*
Higher Education	0.0	1.9	1.7	1.3	*-22.7*	*na*
Other Education	1.1	2.7	2.7	2.8	*5.3*	*10.3*
Scientific Research	0.0	0.0	0.0	0.0	*na*	*na*
Education & research sector	**11**	**20**	**22**	**23**	***5.5***	***7.3***
Total GDP: Queenstown-Lakes District	**596**	**1,190**	**1,214**	**1,246**	***2.6***	***7.6***

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Table 12.25 presents the recent and longer-term direct contribution of education and research businesses to the Queenstown-Lakes District economy.

Table 12.25 Education and research businesses in Queenstown-Lakes District

Education & research sector business units	Year ending March 1999	2007	2008	2009	%pa change 2008 to 2009	1999 to 2009
Preschool Education	10	10	12	13	*8.3*	*2.7*
Primary and Secondary Education	9	13	12	11	*-8.3*	*2.0*
Higher Education	0	1	2	3	*50.0*	*na*
Other Education	6	14	20	31	*55.0*	*17.8*
Scientific Research	0	0	0	0	*na*	*na*
Education & research sector	**25**	**38**	**46**	**58**	***26.1***	***8.8***
Total business units: Queenstown-Lakes District	**2,449**	**5,732**	**6,071**	**6,186**	***1.9***	***9.7***

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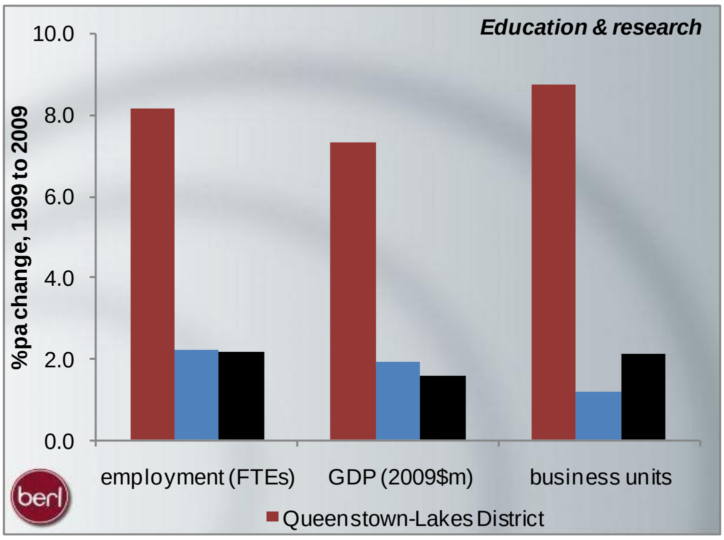
Figure 12.7 shows the change in employment, GDP and business units in the education and research sector in Queenstown-Lakes District and at a regional and national level since 1999.

Figure 12.7 Education and research sector growth, Queenstown-Lakes District, Otago Region, New Zealand



The sector has seen powerful growth in the District since 1999, averaging between 7.3 percent and 8.8 percent growth across all indicators. Much of this growth will be the result of the District's surging population and the increased provision of pre-school, primary and secondary education.

12.6.6 Engineering, and machinery and equipment manufacturing

Table 12.26 presents the recent and longer-term direct contribution of engineering, and machinery and equipment manufacturing employment to the Queenstown-Lakes District economy.

Table 12.26 Engineering, and machinery and equipment manufacturing employment in Queenstown-Lakes District

Engineering, machinery & equip mfg sector employment (FTEs)	Year ending March 1999	2007	2008	2009	%pa change 2008 to 2009	1999 to 2009
Machinery and Equipment Manufacturing	48	99	83	86	*3.5*	*6.0*
Consultant Engineering Services	20	117	125	108	*-13.2*	*18.4*
Engineering, machinery & equip mfg sector	**68**	**216**	**208**	**194**	***-6.5***	***11.1***
Total employment: Queenstown-Lakes District	**7,335**	**14,489**	**14,411**	**14,572**	***1.1***	***7.1***

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Table 12.27 presents the recent and longer-term direct contribution of engineering, and machinery and equipment manufacturing GDP to the Queenstown-Lakes District economy.

Table 12.27 Engineering, and machinery and equipment manufacturing GDP in Queenstown-Lakes District

Engineering, machinery & equip mfg sector GDP (2009$m)	Year ending March 1999	2007	2008	2009	%pa change 2008 to 2009	1999 to 2009
Machinery and Equipment Manufacturing	3.5	8.0	7.1	7.0	*-1.1*	*7.1*
Consultant Engineering Services	1.4	8.1	8.9	7.8	*-11.8*	*18.5*
Engineering, machinery & equip mfg sector	**5.0**	**16.1**	**16.0**	**14.9**	***-7.1***	***11.6***
Total GDP: Queenstown-Lakes District	**596**	**1,190**	**1,214**	**1,246**	***2.6***	***7.6***

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Table 12.28 presents the recent and longer-term direct contribution of engineering, and machinery and equipment manufacturing businesses to the Queenstown-Lakes District economy.

Table 12.28 Engineering, and machinery and equipment manufacturing businesses in Queenstown-Lakes District

Engineering, machinery & equip mfg sector business units	Year ending March 1999	2007	2008	2009	%pa change 2008 to 2009	1999 to 2009
Machinery and Equipment Manufacturing	20	35	34	37	*8.8*	*6.3*
Consultant Engineering Services	12	45	57	56	*-1.8*	*16.7*
Engineering, machinery & equip mfg sector	**32**	**80**	**91**	**93**	***2.2***	***11.3***
Total business units: Queenstown-Lakes District	**2,449**	**5,732**	**6,071**	**6,186**	***1.9***	***9.7***

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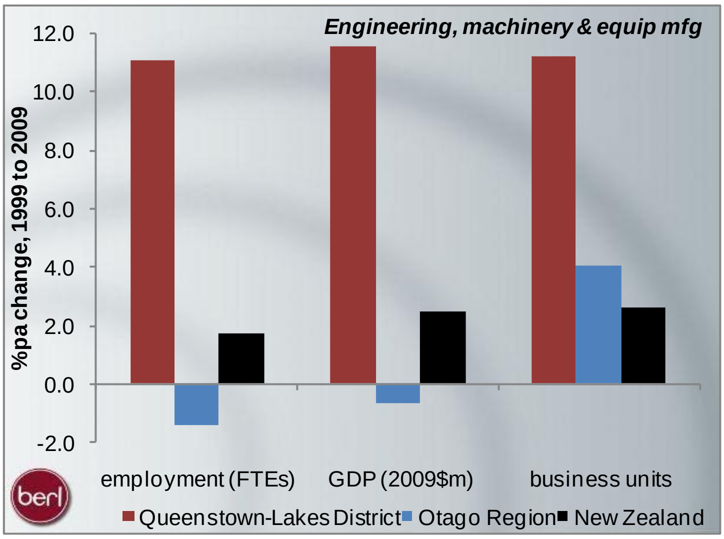
Figure 12.8 shows the change in employment, GDP and business units in the engineering, and machinery and equipment manufacturing sector in Queenstown-Lakes District and at a regional and national level since 1999.

Figure 12.8 Engineering, and machinery and equipment manufacturing sector growth, Queenstown-Lakes District, Otago Region, New Zealand



The District has seen extraordinary growth in the sector since 1999. It is possible that much of this growth, led by consultant engineering services, was linked to the housing boom that ended in late 2007. This would explain the downturn in employment in the sector in 2008 and 2009.

13 Waitaki District

- Despite a falling population inhibiting growth, the Waitaki District has performed well over the last year and the decade, achieving better than average labour productivity and GDP per capita growth.

- Manufacturing (primary processing) has passed the primary sector as the largest sector in the District.

- The primary processing and creative sectors have both seen stronger than national gains in employment and GDP, boosted by excellent labour productivity rises.

Table 9.1 presents the composition of the Waitaki economy, as well as its share of the regional and national economies.

Table 13.1 Composition of Waitaki economy, 2009

Sector (2009)	FTEs	% of TLA	% of Otago	% of NZ	GDP (09$m)	% of TLA	% of Otago	% of NZ	Bus. units	% of TLA	% of Otago	% of NZ
Primary	1,984	*22.3%*	*19.1%*	*1.3%*	185	*21.3%*	*22.1%*	*1.4%*	1,022	*35.5%*	*20.8%*	*1.3%*
Manufacturing	2,060	*23.2%*	*20.2%*	*0.9%*	254	*29.1%*	*21.2%*	*1.0%*	95	*3.3%*	*9.8%*	*0.4%*
Construction	718	*8.1%*	*8.8%*	*0.5%*	41	*4.7%*	*8.9%*	*0.5%*	237	*8.2%*	*8.3%*	*0.5%*
Retail and Distribution	1,950	*21.9%*	*8.2%*	*0.4%*	124	*14.2%*	*7.8%*	*0.3%*	498	*17.3%*	*9.8%*	*0.5%*
Business Services	666	*7.5%*	*4.9%*	*0.2%*	179	*20.6%*	*7.0%*	*0.3%*	726	*25.2%*	*8.0%*	*0.4%*
Recreation Services	294	*3.3%*	*4.9%*	*0.2%*	16	*1.8%*	*4.9%*	*0.2%*	152	*5.3%*	*8.2%*	*0.5%*
Social Services	1,213	*13.6%*	*6.4%*	*0.3%*	72	*8.3%*	*6.2%*	*0.3%*	147	*5.1%*	*9.0%*	*0.5%*
Totals	**8,886**	***100.0%***	***9.8%***	***0.5%***	**871**	***100.0%***	***10.7%***	***0.5%***	**2,877**	***100.0%***	***10.9%***	***0.6%***

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Waitaki plays a major role in the Otago Region's primary and manufacturing (mostly food processing) sectors, while the District's largely rural nature means it has a smaller share of employment in business services and recreation services than the size of its workforce would suggest.

Table 13.2 presents the performance of the Waitaki District across seven key performance indicators (KPIs) for the latest year, and compares this performance with that of the Otago Region and New Zealand.

Table 13.2 KPIs, Waitaki District, 2009

Key Performance Indicators	%pa for 2009 year		
	Waitaki District	Otago Region	New Zealand
Resident population growth	**0.0**	0.8	1.1
Real Value Added (GDP) growth	**2.7**	-0.5	-1.1
GDP per capita growth	**2.7**	-1.3	-2.2
Employment growth	**5.3**	0.8	0.7
Labour productivity growth	**-2.6**	-1.4	-1.9
Business units growth	**0.8**	1.1	0.3
Business size growth	**4.4**	-0.3	0.3

Source: BERL, Statistics NZ

The District enjoyed strong growth in employment and GDP in 2009, even as the national and Regional economies slowed. Labour productivity fell sharply even as employment rose, a pattern often seen around the country.

The average size of businesses grew, as did the number of businesses overall. What makes these results even more remarkable was that they were achieved with a flat population growth rate. Population growth would no doubt have raised these figures even more.

The BERL regional database collates data across seven KPIs over a 10-year period. These seven KPIs are listed in Table 13.3, which presents Waitaki District's performance over the decade compared to the Otago Region and New Zealand as a whole.

Table 13.3 KPIs, Waitaki District, 1999 to 2009

Key Performance Indicators	%pa for 1999-2009		
	Waitaki District	Otago Region	New Zealand
Resident population growth	**-0.2**	1.0	1.2
Real Value Added (GDP) growth	**1.9**	3.1	3.1
GDP per capita growth	**2.1**	2.1	1.8
Employment growth	**1.5**	2.8	2.4
Productivity growth	**0.5**	0.4	0.8
Business units growth	**1.6**	3.7	3.0
Business size growth	**-0.1**	-0.9	-0.6

Source: BERL, Statistics NZ

Over the long-term, Waitaki has endured the same difficulty of a falling population that several other predominantly rural Districts have. As a result, its figures, while far from poor, are probably below where they would have been had population growth matched that of New Zealand.

Of some interest is the fact that business sizes have remained almost constant since 1999 while they have fallen at the Regional and national levels. This is because employment has grown at the same rate as business units in Waitaki.

13.1 Employment

Table 13.4 shows employment numbers for Waitaki District for the last three periods and the longer term. It also shows the aggregate change over the same period for New Zealand and the Otago Region.

Table 13.4 Waitaki District employment summary

	Employment Number FTEs				%pa change		
Sector	**1999**	**2007**	**2008**	**2009**	**2007 to 2008**	**2008 to 2009**	**1999 to 2009**
Primary	1,889	1,900	1,924	1,984	1.3	3.1	0.5
Manufacturing	1,750	1,899	1,968	2,060	3.6	4.6	1.6
Construction	467	696	707	718	1.6	1.5	4.4
Retail and Distribution	1,638	1,947	1,874	1,950	-3.7	4.1	1.8
Business Services	498	657	606	666	-7.8	10.0	3.0
Recreation Services	236	298	295	294	-0.9	-0.2	2.2
Social Services	1,179	1,212	1,067	1,213	-11.9	13.7	0.3
Waitaki District	**7,657**	**8,608**	**8,442**	**8,886**	**-1.9**	**5.3**	**1.5**
Otago Region	**68,939**	**89,664**	**90,440**	**91,130**	**0.9**	**0.8**	**2.8**
New Zealand	**1,473,526**	**1,840,284**	**1,854,636**	**1,866,747**	**0.8**	**0.7**	**2.4**

Source: BERL, Statistics NZ

In 2008, manufacturing passed the primary sector as the leading employer in the District. Strong growth in retail and distribution suggests it may do the same in the next couple of years. As a result of these changes, manufacturing accounts for 23 percent of employment. Retail and distribution and Primary each supply 22 percent of jobs.

Almost all sectors saw growth in employment in 2009 despite the global downturn. In the decade since 1999, all sectors have enjoyed employment rises although growth rates have varied between 0.3 percent and 4.4 percent a year.

13.2 GDP

Table 13.5 describes the GDP for Waitaki District, and compares its performance to that of New Zealand and Otago Region.

Table 13.5 Waitaki District GDP summary

	Value Added or GDP (2009$m)				%pa change		
Sector	1999	2007	2008	2009	2007 to 2008	2008 to 2009	1999 to 2009
Primary	190	170	191	185	12.8	-3.1	-0.3
Manufacturing	180	238	247	254	3.8	2.6	3.5
Construction	26	41	42	41	2.6	-2.3	4.5
Retail and Distribution	91	119	123	124	3.2	0.9	3.2
Business Services	155	162	159	179	-1.8	13.1	1.4
Recreation Services	12	16	16	16	-1.5	-0.6	2.5
Social Services	67	72	70	72	-2.0	2.4	0.7
Waitaki District	**722**	**817**	**848**	**871**	**3.8**	**2.7**	**1.9**
Otago Region	**6,020**	**7,971**	**8,176**	**8,139**	**2.6**	**-0.5**	**3.1**
New Zealand	**136,841**	**181,968**	**187,651**	**185,554**	**3.1**	**-1.1**	**3.1**

Source: BERL, Statistics NZ

Results for GDP were more mixed in the short and the long-term. In 2009, three sectors experienced a decline in GDP although overall the District achieved a rate of 2.7 percent.

Since 1999, all sectors other than primary enjoyed GDP growth. With a slight increase in employment (0.5 percent a year) and a slight fall in GDP (-0.3 percent a year), the primary sector has seen a significant fall in labour productivity, as pointed out in the next section.

13.2.1 Labour productivity

Table 13.6 presents the changes in labour productivity for Waitaki District sectors for the last 10 years, along with a national and Regional comparison.

Table 13.6 Waitaki District labour productivity summary

	Productivity (2009$ per FTE)				%pa change		
Sector	1999	2007	2008	2009	2007 to 2008	2008 to 2009	1999 to 2009
Primary	100,611	89,272	99,442	93,432	11.4	-6.0	-0.7
Manufacturing	102,954	125,533	125,707	123,189	0.1	-2.0	1.8
Construction	56,625	58,653	59,238	57,015	1.0	-3.8	0.1
Retail and Distribution	55,287	61,130	65,526	63,539	7.2	-3.0	1.4
Business Services (#)	192,214	161,453	168,219	179,839	4.2	6.9	-0.7
Recreation Services	51,490	53,413	53,045	52,855	-0.7	-0.4	0.3
Social Services	56,837	59,232	65,911	59,379	11.3	-9.9	0.4
Waitaki District (#)	**86,472**	**88,473**	**93,743**	**91,314**	**6.0**	**-2.6**	**0.5**
Otago Region (#)	**80,092**	**82,863**	**84,365**	**83,210**	**1.8**	**-1.4**	**0.4**
New Zealand (#)	**85,181**	**92,168**	**94,419**	**92,607**	**2.4**	**-1.9**	**0.8**

 # excl owner-occupied dwellings sector

Source: BERL, Statistics NZ

Labour productivity fell 2.6 percent in Waitaki in 2009, in a year where national and Regional labour productivity plummeted. Only business services saw GDP per FTE rise.

Since 1999, labour productivity gains have matched those seen Regionally, and have been slightly below the national average. Leading the charge has been manufacturing, and retail and distribution.

13.3 Business units and size

Table 13.7 shows the change in the number of businesses within each sector in the Waitaki District over the last 10 years. It also shows overall national and Regional business unit growth.

Table 13.7 Waitaki District business units summary

	Business Units (number)				%pa change		
Sector	**1999**	**2007**	**2008**	**2009**	**2007 to 2008**	**2008 to 2009**	**1999 to 2009**
Primary	1,246	1,086	1,052	1,022	-3.1	-2.9	-2.0
Manufacturing	88	95	93	95	-2.1	2.2	0.8
Construction	137	226	240	237	6.2	-1.3	5.6
Retail and Distribution	418	485	498	498	2.7	0.0	1.8
Business Services	300	667	686	726	2.8	5.8	9.2
Recreation Services	119	145	144	152	-0.7	5.6	2.5
Social Services	150	137	140	147	2.2	5.0	-0.2
Waitaki District	**2,458**	**2,841**	**2,853**	**2,877**	**0.4**	**0.8**	**1.6**
Otago Region	**18,258**	**25,403**	**26,092**	**26,367**	**2.7**	**1.1**	**3.7**
New Zealand	**379,701**	**500,728**	**511,030**	**512,580**	**2.1**	**0.3**	**3.0**

Source: BERL, Statistics NZ

There are 400 more businesses in the District than there were in 1999. Growth in 2009 averaged 0.8 percent across the sectors, double the national rate of growth, with strong rises in business services, recreation services, and social services.

Over the 10 years to 2009, business unit increases have occurred at half the national rate. As pointed out earlier, this is likely to be linked to the decline in population in the District. In other words, if the influence of a falling population were removed, Waitaki's performance would have been substantially better.

13.3.1 Business size

Table 13.8 shows the changes in average business size at the seven sector level and the District level for Waitaki, compared with Regional and national trends.

Table 13.8 Waitaki District business size summary

	Business Size (FTEs per unit)				%pa change		
Sector	**1999**	**2007**	**2008**	**2009**	**2007 to 2008**	**2008 to 2009**	**1999 to 2009**
Primary	1.5	1.7	1.8	1.9	4.6	6.1	2.5
Manufacturing	19.9	20.0	21.2	21.7	5.9	2.4	0.9
Construction	3.4	3.1	2.9	3.0	-4.3	2.8	-1.2
Retail and Distribution	3.9	4.0	3.8	3.9	-6.2	4.1	0.0
Business Services	1.7	1.0	0.9	0.9	-10.3	3.9	-5.8
Recreation Services	2.0	2.1	2.1	1.9	-0.2	-5.5	-0.2
Social Services	7.9	8.8	7.6	8.3	-13.8	8.2	0.5
Waitaki District	**3.1**	**3.0**	**3.0**	**3.1**	**-2.3**	**4.4**	**-0.1**
Otago Region	**3.8**	**3.5**	**3.5**	**3.5**	**-1.8**	**-0.3**	**-0.9**
New Zealand	**3.9**	**3.7**	**3.6**	**3.6**	**-1.3**	**0.3**	**-0.6**

Source: BERL, Statistics NZ

Average business size has stayed constant in Waitaki over the last 10 years, and in fact recorded solid growth in 2009. In 2009, only recreation services saw a fall in business size, with moderate to strong gains across all other sectors.

Over the decade to 2009, sector-level changes have been more mixed, with strong declines in business size in business services as many people set up their own companies (a national trend). At the same time, there were strong rises in the primary sector as the number of businesses fell and employment increased.

13.4 Fastest-growing industries

Industries are compared at the 53-industry level. The analysis only covers industries that have over 25 FTEs and, for GDP, those industries earning over $2.25 million.

13.4.1 Employment

Table 13.9 presents the ten fastest growing industries in Waitaki District by FTE employment.

Table 13.9 Ten fastest growing industries by FTE growth

Rank by FTE growth	Industry	FTEs 2006	2007	2008	2009	%pa growth 2008 to 2009	2006 to 2009
1	Petroleum, Coal, Chemical & Assoc Prod Mfg	15	14	20	33	64.0	30.8
2	Metal Ore Mining	83	132	145	181	24.7	29.5
3	Education	330	458	376	469	24.6	12.4
4	Personal and Household Good Wholesaling	59	49	61	84	36.6	12.3
5	Metal Product Manufacturing	90	113	109	122	12.4	10.8
6	Commercial Fishing	27	29	29	37	24.4	10.4
7	Libraries, Museums and the Arts	33	34	37	40	9.6	6.5
8	Non-Metallic Mineral Product Manufacturing	26	29	15	31	106.5	6.1
9	Basic Material Wholesaling	138	156	151	163	8.0	5.8
10	Food Retailing	312	313	347	366	5.4	5.5

Source: BERL, Statistics NZ

Over the three years to 2009, there was particularly strong growth in petroleum, coal, chemical and associated product manufacturing, with employment doubling. The result was similar for metal ore mining as gold mining operations expanded, with 100 new FTEs added in three years.

In absolute numbers, education has seen the largest gains, of around 140 FTEs, with 12 percent growth a year. Part of these gains can be explained by the rise in pre-school education since subsidies were introduced in 2007.

13.4.2 GDP

Table 13.10 presents the ten fastest growing industries by GDP growth in the three years to March 2009.

Table 13.10 Ten fastest growing industries by GDP

Rank by GDP growth	Industry	GDP (2009$m) 2006	2007	2008	2009	%pa growth 2008 to 2009	2006 to 2009
1	Petroleum, Coal, Chemical & Assoc Prod Mfg	1.7	1.8	2.6	4.1	59.1	35.4
2	Insurance	1.5	1.4	2.3	3.1	32.8	26.6
3	Metal Ore Mining	33.1	34.6	56.4	54.1	-4.0	17.8
4	Personal and Household Good Wholesaling	7.0	5.8	7.5	10	32.2	12.3
5	Motor Vehicle Retailing and Services	14.3	15.2	17.1	19	9.5	9.2
6	Metal Product Manufacturing	9.2	11	11	11	1.7	6.9
7	Services to Transport	2.2	2.1	2.6	2.7	1.5	6.8
8	Textile, Clothing, Footwear & Leather Mfg	17.7	18.6	23.3	20.9	-9.9	5.8
9	Communication Services	14	13	13	17	28.1	5.7
10	Motion Picture, Radio and Television Services	2.5	3.3	3.2	2.9	-9.0	5.5

Source: BERL, Statistics NZ

The industries on this list are mostly the same as those in the employment growth table, which makes sense given the direct link between rising employment and GDP growth.

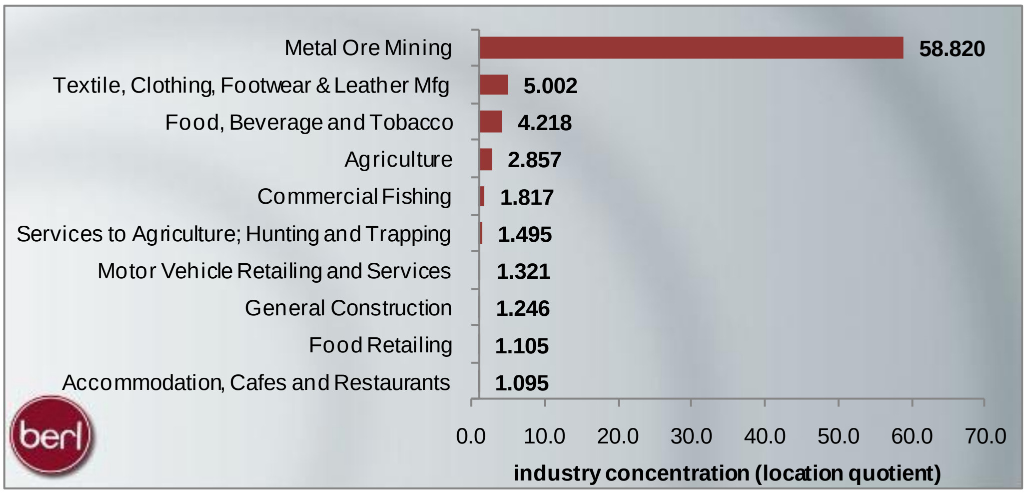
In absolute terms, the largest rises in contribution to GDP in the last three years have been in metal ore mining ($21 million) and motor vehicle retailing and services ($4.3 million).

13.5 Location quotients

This section looks at the concentration of industries in Waitaki District compared to the national average. Again the analysis is at the 53-industry level.

Figure 13.1 shows the ten industries with the highest location quotients. Because of the small numbers in some industries in Waitaki District, we only compare those industries that have at least 25 FTEs.[15]

Figure 13.1 Ten industries with the highest FTE location quotients



With one of the country's major gold mines, the District has 59 times the national concentration of metal ore miners. This number dwarfs other figures on the graph, which are nevertheless significant. The District has a strong manufacturing focus, with clothing; and food and beverage manufacturing each employing more than four times the share of workers they do in New Zealand overall.

Figure 13.2 shows the ten industries with the lowest location quotients in the Waitaki District. In other words, these industries, while they have some representation in the District, are ones in which workers at a national level are far more likely to be employed than in the District.

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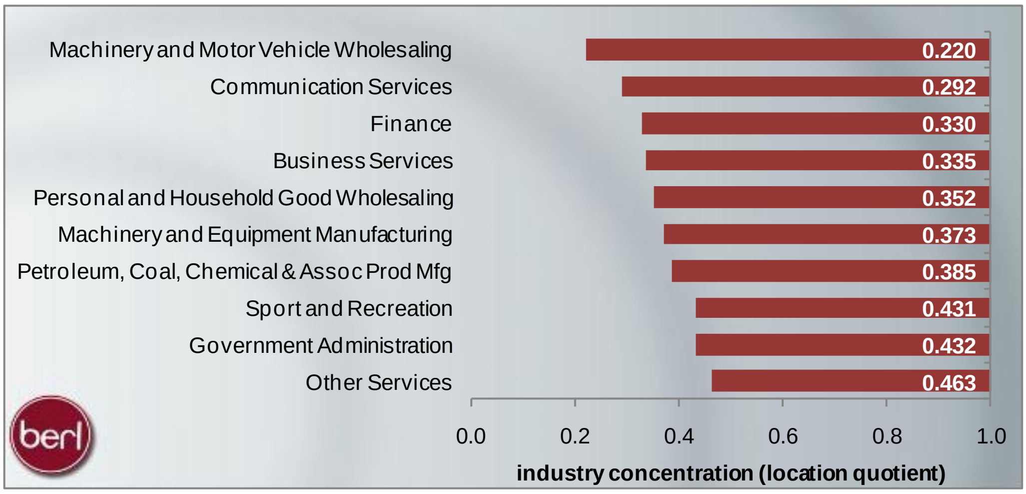
15 Thirty-five industries in Otago Region employ over 25 FTEs. Seven industries do not have a presence in Otago Region – coal mining; oil and gas exploration; services to mining; water transport; other transport; storage; and private households employing staff.

Figure 13.2 Ten industries with the lowest FTE location quotients



The District has a low concentration of workers in the finance and insurance; business services; communication services; and various wholesaling industries, at between one-fifth and one-third the concentrations seen nationally.

13.6 Key sectors in the District

This chapter summarises the performance of six key sectors highlighted in the Economic Development Strategy for the Otago Region, and in our analysis of major employers in the District. The performance of each sector is assessed in terms of changes in employment, GDP, and business units. It also summarises the recent performance of the housing market, and provides additional detail on dairy and sheep farming, and schooling.

13.6.1 Tourism sector

Table 13.11 presents the recent and longer-term direct contribution of tourism employment to the Waitaki District economy.

Table 13.11 Tourism employment in Waitaki District

	Years ended March				*%pa change*	
Tourism employment (FTEs)	**1999**	**2007**	**2008**	**2009**	***2008 to 2009***	***1999 to 2009***
Tourism-characteristic industries	230	291	241	262	*8.6*	*1.3*
Tourism-related industries	81	91	94	97	*3.1*	*1.8*
All non-tourism-related industries	52	57	57	60	*5.4*	*1.4*
Tourism sector	**363**	**440**	**392**	**419**	***6.8***	***1.4***
Total employment: Waitaki District	**7,657**	**8,608**	**8,442**	**8,886**	***5.3***	***1.5***

BERL, Tourism Satellite Account

Table 13.12 presents the recent and longer-term direct contribution of tourism GDP to the Waitaki District economy.

Table 13.12 Tourism GDP in Waitaki District

Tourism GDP (2009$m)	Years ended March 1999	2007	2008	2009	%pa change 2008 to 2009	1999 to 2009
Tourism-characteristic industries	9.3	11.0	10.8	10.8	*-0.4*	*1.5*
Tourism-related industries	3.7	5.0	5.5	5.5	*0.0*	*4.1*
All non-tourism-related industries	6.2	7.1	7.2	7.3	*1.7*	*1.8*
Tourism sector	**19.1**	**23.1**	**23.5**	**23.6**	***0.3***	***2.1***
Total GDP: Waitaki District	**722**	**817**	**848**	**871**	***2.7***	***1.9***

BERL, Tourism Satellite Account

Table 13.13 presents the recent and longer-term direct contribution of tourism businesses to the Waitaki District economy.

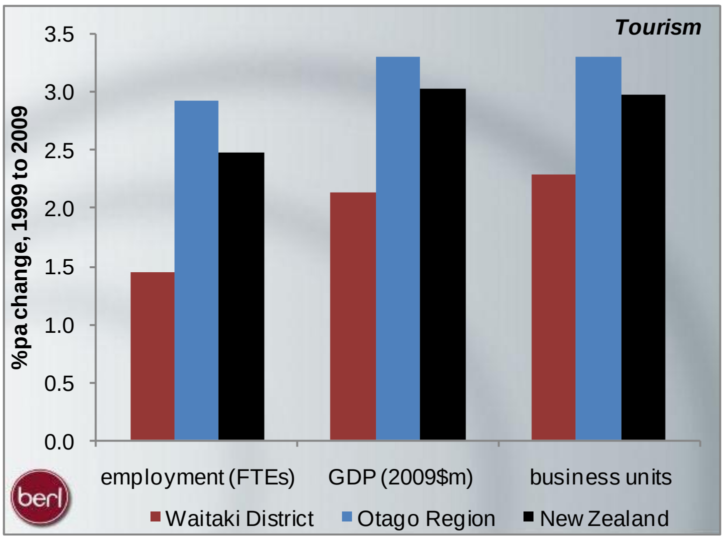
Table 13.13 Tourism businesses in Waitaki District

Tourism businesses	Years ended March 1999	2007	2008	2009	%pa change 2008 to 2009	1999 to 2009
Tourism-characteristic industries	66	85	85	87	*3.0*	*2.8*
Tourism-related industries	20	22	22	22	*-2.1*	*1.0*
All non-tourism-related industries	17	20	20	20	*0.9*	*1.6*
Tourism sector	**103**	**126**	**127**	**129**	***1.7***	***2.3***
Total business units: Waitaki District	**2,458**	**2,841**	**2,853**	**2,877**	***0.8***	***1.6***

BERL, Tourism Satellite Account

Figure 13.3 shows the change in employment, GDP and business units in the tourism sector in Waitaki District and at a regional and national level since 1999.

Figure 13.3 Tourism sector growth, Waitaki District, Otago Region, New Zealand



Over the decade, New Zealand in general has seen strong growth in the tourism sector. Waitaki has broadly followed the national trends across all three indicators. Employment grew 1.5 percent a year, GDP by 2.2 percent, and business units directly attributable to tourism by 2.3 percent.

13.6.2 Primary production sector

Table 13.14 presents the recent and longer-term direct contribution of primary production employment to the Waitaki District economy.

Table 13.14 Primary production employment in Waitaki District

	Year ending March				%pa change	
Primary production sector employment (FTEs)	**1999**	**2007**	**2008**	**2009**	***2008 to 2009***	***1999 to 2009***
Agriculture	1,430	1,491	1,558	1,546	*-0.8*	*0.8*
Services to Agriculture; Hunting and Trapping	85	172	137	178	*29.5*	*7.7*
Forestry and Logging	39	26	25	25	*2.5*	*-4.2*
Commercial Fishing	30	29	29	37	*24.4*	*2.0*
Mining and services to mining	305	183	175	198	*13.1*	*-4.2*
Primary production sector	**1,889**	**1,900**	**1,924**	**1,984**	***3.1***	***0.5***
Total employment: Waitaki District	**7,657**	**8,608**	**8,442**	**8,886**	***5.3***	***1.5***

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Table 13.15 presents the recent and longer-term direct contribution of primary production GDP to the Waitaki District economy.

Table 13.15 Primary production GDP in Waitaki District

	Year ending March				%pa change	
Primary production sector GDP (2009$m)	**1999**	**2007**	**2008**	**2009**	***2008 to 2009***	***1999 to 2009***
Agriculture	90	109	112	111	*-1.3*	*2.1*
Services to Agriculture; Hunting and Trapping	4	6	5	6	*16.0*	*4.2*
Forestry and Logging	8	8	8	8	*-3.0*	*0.1*
Commercial Fishing	2	2	2	2	*14.3*	*-0.5*
Mining and services to mining	86	44	64	58	*-8.4*	*-3.8*
Primary production sector	**190**	**170**	**191**	**185**	***-3.1***	***-0.3***
Total GDP: Waitaki District	**722**	**817**	**848**	**871**	***2.7***	***1.9***

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Table 13.16 presents the recent and longer-term direct contribution of primary production businesses to the Waitaki District economy.

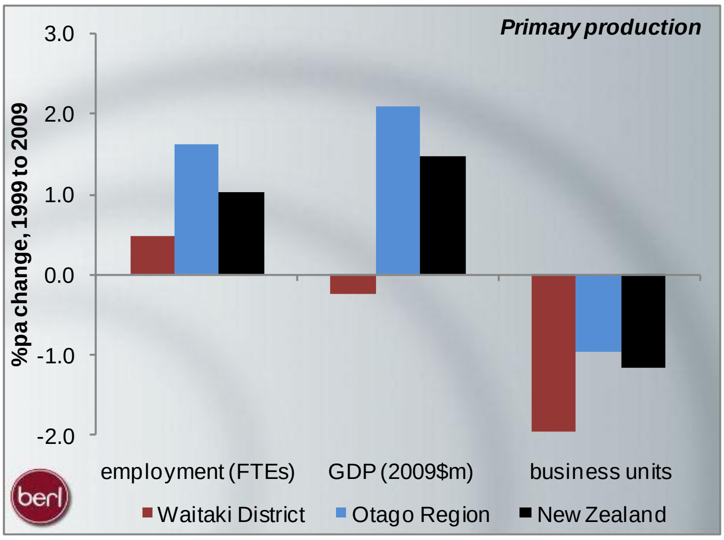
Table 13.16 Primary production businesses in Waitaki District

	Year ending March				%pa change	
Primary production sector business units	**1999**	**2007**	**2008**	**2009**	***2008 to 2009***	***1999 to 2009***
Agriculture	1,116	901	867	843	*-2.8*	*-2.8*
Services to Agriculture; Hunting and Trapping	34	98	103	101	*-1.9*	*11.5*
Forestry and Logging	62	58	57	57	*0.0*	*-0.8*
Commercial Fishing	23	19	15	14	*-6.7*	*-4.8*
Mining and services to mining	11	10	10	7	*-30.0*	*-4.4*
Primary production sector	**1,246**	**1,086**	**1,052**	**1,022**	***-2.9***	***-2.0***
Total business units: Waitaki District	**2,458**	**2,841**	**2,853**	**2,877**	***0.8***	***1.6***

BERL

Figure 13.4 shows the change in employment, GDP and business units in the primary production sector in Waitaki District and at a regional and national level since 1999.

Figure 13.4 Primary production sector growth, Waitaki District, Otago Region, New Zealand



Consolidation in the sector has seen employment record little growth, with GDP and business units falling since 1999. The sector is not performing particularly well relative to nationally.

Dairy and sheep

This section summarises and contrasts recent changes within the sheep and dairy farming industries in the Waitaki District.

Table 13.17 summarises five indicators relating to dairy and sheep farming in the Waitaki District and New Zealand for the latest six years.

Table 13.17 Summary dairy and sheep indicators, 2003 to 2009

Dairy and sheep	2003	2004	2005	2006	2007	2008	2009	%pa change 2008 to 2009	%pa change 2003 to 2009
number of dairy herds									
Waitaki District	82	82	84	88	94	98	105	*7.1*	*4.2*
New Zealand	13,140	12,751	12,271	11,883	11,630	11,436	11,618	*1.6*	*-2.0*
total cows ('000)									
Waitaki District	45.2	46.0	49.2	51.0	57.0	62.7	66.9	*6.7*	*6.8*
New Zealand	3,740.6	3,851.3	3,867.7	3,832.1	3,916.8	4,012.9	4,252.9	*6.0*	*2.2*
total effective dairy ha ('000)									
Waitaki District	16.6	16.5	16.3	17.1	19.1	20.3	21.2	*4.6*	*4.2*
New Zealand	1,463.3	1,421.1	1,411.6	1,399.0	1,412.9	1,436.5	1,519.1	*5.7*	*0.6*
average kilograms of milk solids per ha									
Waitaki/ Central Otago District*	1,012	1,064	1,074	1,072	1,165	1,192	1,192	*0.0*	*2.8*
New Zealand	828	889	862	907	934	872	921	*5.6*	*1.8*
total sheep ('000)									
Waitaki District	1,081	951	880	909	891	978	747	*9.7*	*-6.0*
New Zealand	39,552	39,271	39,880	40,098	38,568	34,088	32,357	*-11.6*	*-3.3*

* 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.

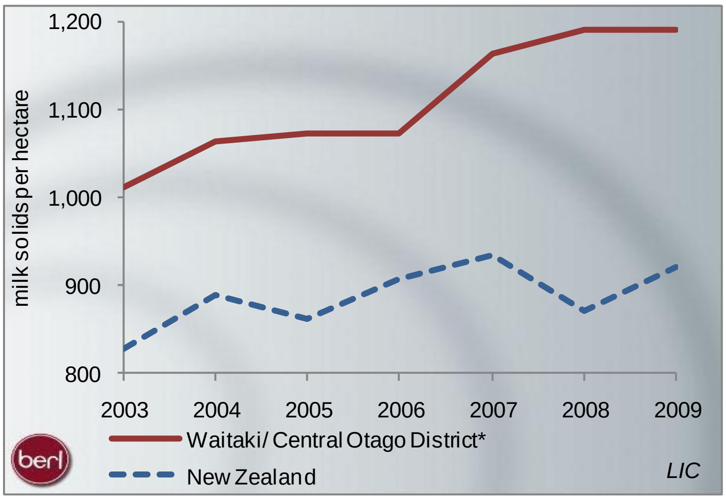
Source: LIC, Meat and Wool NZ

The Waitaki District continues to outperform the national growth in dairy across all indicators, with increases in herds, cows, hectares under production and productivity (milk solids per hectare) all above national averages since 2003.

As dairy production rises, sheep farming has contracted substantially across the District and, to a slightly lesser degree, the country. In Waitaki, sheep numbers have fallen by 24 percent in the last year alone, and by 31 percent since 2003.

Figure 13.5 shows the recent growth in milk solids per hectare under production for Waitaki and New Zealand.

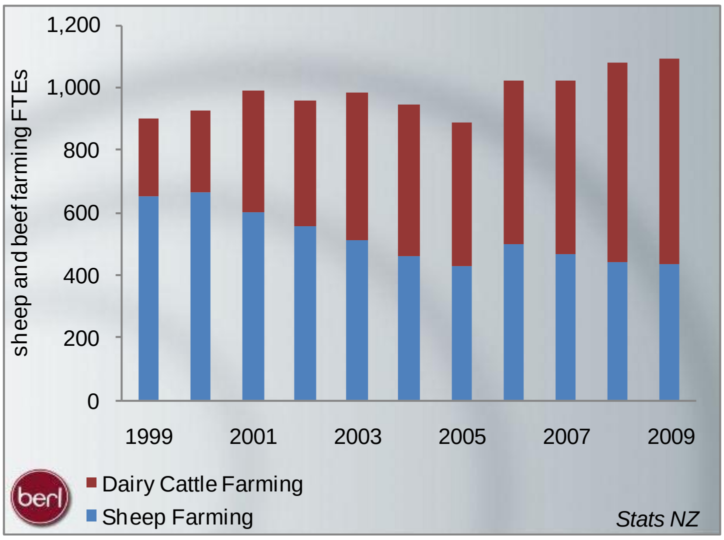
Figure 13.5 Milk solids per hectare, Waitaki and New Zealand



On average, dairy farms in New Zealand produced 921 kilograms of milk solids per hectare in 2009. The figure for Waitaki was 1,192 kilograms. In addition, over the last six years this gap has widened, from 184 kilograms to 271 kilograms.

Figure 13.6 highlights the ongoing trend in switching from sheep to dairy farming.

Figure 13.6 Employment in dairy and sheep farming, 1999 to 2009



In 1999, around 72 percent of employment in the two industries was in sheep farming. Over time, total employment in the two industries has grown by around 200, but all of these gains have been in dairying. Dairy farming now accounts for 60 percent of employment in the two industries.

13.6.3 Primary processing sector

Table 13.18 presents the recent and longer-term direct contribution of primary processing employment to the Waitaki District economy.

Table 13.18 Primary processing employment in Waitaki District

	Year ending March				%pa change	
Primary processing sector employment (FTEs)	**1999**	**2007**	**2008**	**2009**	***2008 to 2009***	***1999 to 2009***
Food, Beverage and Tobacco	1,071	1,247	1,257	1,334	*6.1*	*2.2*
Wood and Paper Product Manufacturing	81	80	76	73	*-3.5*	*-1.0*
Primary processing sector	**1,152**	**1,327**	**1,333**	**1,407**	***5.6***	***2.0***
Total employment: Waitaki District	**7,657**	**8,608**	**8,442**	**8,886**	***5.3***	***1.5***

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Table 13.19 presents the recent and longer-term direct contribution of primary processing GDP to the Waitaki District economy.

Table 13.19 Primary processing GDP in Waitaki District

	Year ending March				%pa change	
					2008 to	1999 to
Primary processing sector GDP (2009$m)	**1999**	**2007**	**2008**	**2009**	***2009***	***2009***
Food, Beverage and Tobacco	128	181	183	189	*3.0*	*4.0*
Wood and Paper Product Manufacturing	9	11	11	10	*-5.3*	*1.7*
Primary processing sector	**136**	**191**	**194**	**199**	***2.6***	***3.8***
Total GDP: Waitaki District	**722**	**817**	**848**	**871**	***2.7***	***1.9***

BERL

Table 13.20 presents the recent and longer-term direct contribution of primary processing businesses to the Waitaki District economy.

Table 13.20 Primary processing businesses in Waitaki District

	Year ending March				%pa change	
					2008 to	1999 to
Primary processing sector business units	**1999**	**2007**	**2008**	**2009**	***2009***	***2009***
Food, Beverage and Tobacco	16	8	10	11	*10.0*	*-3.7*
Wood and Paper Product Manufacturing	12	15	14	16	*14.3*	*2.9*
Primary processing sector	**28**	**23**	**24**	**27**	***12.5***	***-0.4***
Total business units: Waitaki District	**2,458**	**2,841**	**2,853**	**2,877**	***0.8***	***1.6***

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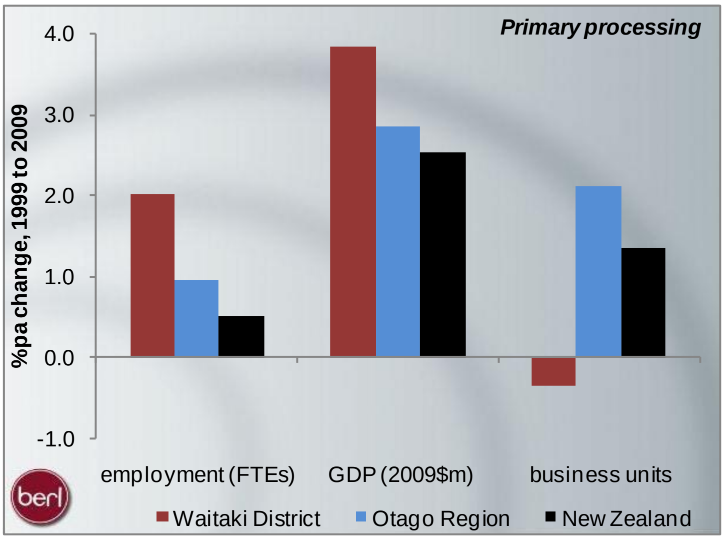
Figure 13.7 shows the change in employment, GDP and business units in the primary processing sector in Waitaki District and at a regional and national level since 1999.

Figure 13.7 Primary processing sector growth, Waitaki District, Otago Region, New Zealand



Employment and GDP in the sector have surged in Waitaki District since 1999, with resultant rises in labour productivity of around 1.8 percent a year, an excellent result.

13.6.4 Creative sector

Table 13.21 presents the recent and longer-term direct contribution of creative sector employment to the Waitaki District economy.

Table 13.21 Creative sector employment in Waitaki District

	Year ending March				%pa change	
Creative sector employment (FTEs)	1999	2007	2008	2009	2008 to 2009	1999 to 2009
Printing and publishing	43	61	55	60	9.9	3.4
Arts and antiques market	9	0	6	6	4.4	-3.8
Commercial services	6	5	9	15	73.3	9.7
Film, video and television services	12	16	12	10	-18.0	-2.0
Creative arts, studios and venues	12	9	15	9	-37.5	-2.8
Creative sector	**82**	**91**	**96**	**100**	**4.6**	**2.0**
Total employment: Waitaki District	**7,657**	**8,608**	**8,442**	**8,886**	**5.3**	**1.5**

BERL

Table 13.22 presents the recent and longer-term direct contribution of creative sector GDP to the Waitaki District economy.

Table 13.22 Creative sector GDP in Waitaki District

	Year ending March				%pa change	
Creative sector GDP (2009$m)	1999	2007	2008	2009	2008 to 2009	1999 to 2009
Printing and publishing	3.8	5.7	5.4	6.0	10.5	4.7
Arts and antiques market	0.4	0.0	0.3	0.3	1.4	-2.2
Commercial services	0.4	0.4	0.6	1.1	76.0	9.7
Film, video and television services	1.4	1.9	1.5	1.3	-8.4	-0.4
Creative arts, studios and venues	0.6	0.5	0.7	0.5	-34.2	-2.1
Creative sector	**6.6**	**8.4**	**8.6**	**9.2**	**7.9**	**3.4**
Total GDP: Waitaki District	**722**	**817**	**848**	**871**	**2.7**	**1.9**

BERL

Table 13.23 presents the recent and longer-term direct contribution of creative sector businesses to the Waitaki District economy.

Table 13.23 Creative sector businesses in Waitaki District

	Year ending March				%pa change	
Creative sector business units	1999	2007	2008	2009	2008 to 2009	1999 to 2009
Printing and publishing	5	5	4	5	25.0	0.0
Arts and antiques market	7	6	7	7	0.0	0.0
Commercial services	3	9	11	9	-20.5	13.3
Film, video and television services	2	5	5	5	0.0	9.6
Creative arts, studios and venues	4	5	8	8	0.0	7.2
Creative sector	**21**	**30**	**35**	**34**	**-3.6**	**5.1**
Total business units: Waitaki District	**2,458**	**2,841**	**2,853**	**2,877**	**0.8**	**1.6**

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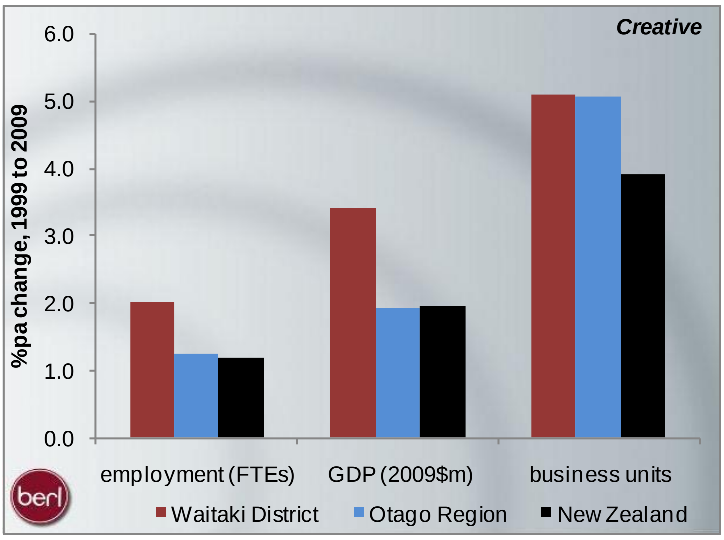
Figure 13.8 shows the change in employment, GDP and business units in the creative sector in Waitaki District and at a regional and national level since 1999.

Figure 13.8 Creative sector growth, Waitaki District, Otago Region, New Zealand



The sector has seen strong growth in the District since 1999, with above national average annual rises across all indicators. Labour productivity growth has been particularly strong, at 1.4 percent a year (the gap between employment growth and GDP growth).

13.6.5 Education and research sector

Table 13.24 presents the recent and longer-term direct contribution of education and research employment to the Waitaki District economy.

Table 13.24 Education and research employment in Waitaki District[16]

	Year ending March				*%pa change*	
Education & research sector employment (FTEs)	**1999**	**2007**	**2008**	**2009**	***2008 to 2009***	***1999 to 2009***
Preschool Education	18	40	34	46	*33.0*	*9.8*
Primary and Secondary Education	410	383	288	367	*27.7*	*-1.1*
Higher Education	9	6	12	12	*3.0*	*3.1*
Other Education	18	28	42	44	*3.0*	*9.2*
Scientific Research	6	5	0	0	*na*	*-100.0*
Education & research sector	**461**	**463**	**376**	**469**	***24.6***	***0.2***
Total employment: Waitaki District	**7,657**	**8,608**	**8,442**	**8,886**	***5.3***	***1.5***

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Table 13.25 presents the recent and longer-term direct contribution of education and research GDP to the Waitaki District economy.

[16] Note we have strong suspicions that the employment figures for primary and secondary education were subject to an error in 2008, as 2009 figures were broadly in line with 2007 figures.

Table 13.25 Education and research GDP in Waitaki District

Education & research sector GDP (2009$m)	Year ending March				%pa change	
	1999	2007	2008	2009	2008 to 2009	1999 to 2009
Preschool Education	0.8	1.7	1.8	1.9	*5.1*	*9.4*
Primary and Secondary Education	18	16	15	15	*0.8*	*-1.4*
Higher Education	0.4	0.3	0.6	0.5	*-18.6*	*2.8*
Other Education	0.8	1.2	2.2	1.8	*-18.6*	*8.9*
Scientific Research	0.4	0.4	0.0	0.0	*na*	*-100.0*
Education & research sector	**20**	**20**	**20**	**19**	***-1.6***	***-0.3***
Total GDP: Waitaki District	**722**	**817**	**848**	**871**	***2.7***	***1.9***

BERL

Table 13.26 presents the recent and longer-term direct contribution of education and research businesses to the Waitaki District economy.

Table 13.26 Education and research businesses in Waitaki District

Education & research sector business units	Year ending March				%pa change	
	1999	2007	2008	2009	2008 to 2009	1999 to 2009
Preschool Education	11	12	12	12	*0.0*	*0.9*
Primary and Secondary Education	26	19	19	19	*0.0*	*-3.1*
Higher Education	1	1	1	1	*0.0*	*0.0*
Other Education	8	8	7	8	*14.3*	*0.0*
Scientific Research	1	1	0	0	*na*	*-100.0*
Education & research sector	**47**	**41**	**39**	**40**	***2.6***	***-1.6***
Total business units: Waitaki District	**2,458**	**2,841**	**2,853**	**2,877**	***0.8***	***1.6***

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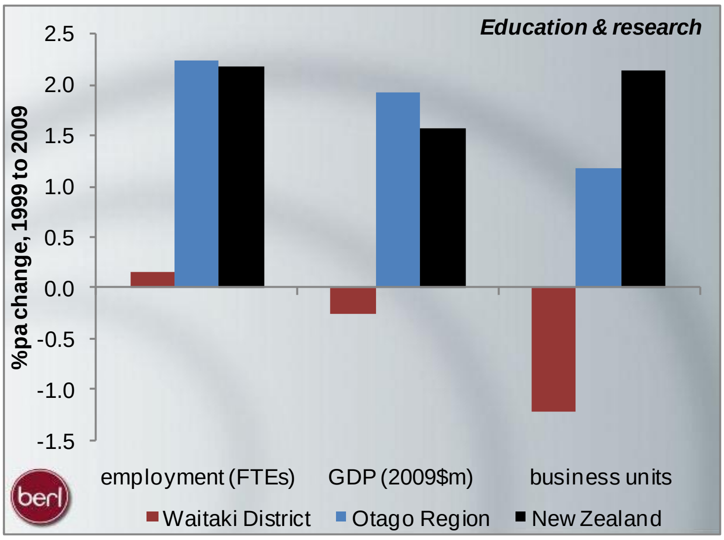
Figure 13.9 shows the change in employment, GDP and business units in the education and research sector in Waitaki District and at a regional and national level since 1999.

Figure 13.9 Education and research sector growth, Waitaki District, Otago Region, New Zealand



The sector has been broadly flat in Waitaki District over the last 10 years, with employment growing slightly, and GDP falling. Business units have fallen by seven over the period.

Schooling

Table 13.27 shows the total student enrolments by school-type in the Waitaki District for the latest three years as well as for 1999.

Table 13.27 School enrolment by school-type, 1999 to 2009

	Enrolments				%pa change	
School Type	1999	2007	2008	2009	2008 to 2009	1999 to 2009
Full Primary	1,094	1,092	1,034	966	-6.6	-1.2
Contributing	906	759	801	791	-1.2	-1.3
Intermediate	283	271	281	282	0.4	0.0
Composite	124	0	0	0	na	-100.0
Secondary (Year 7 - 15)	249	168	173	188	8.7	-2.8
Secondary (Year 9 - 15)	1,422	1,439	1,438	1,402	-2.5	-0.1
Waitaki District	**4,078**	**3,729**	**3,727**	**3,629**	**-2.6**	**-1.2**
New Zealand	727,396	759,718	757,902	760,859	0.4	0.5

source: Ministry of Education

School rolls continued to trend down in the Waitaki District in 2009, at a faster rate than the 10-year average of -1.2 percent. In New Zealand overall, where enrolments turned negative for the first time in 2008, numbers returned to positive territory, up 0.4 percent for the year.

The decline in school-going population in the District is symptomatic of the District's falling population. Efforts to attract young professionals and business investment to the District and to promote liveability may help reverse this trend.

13.6.6 Engineering, and machinery and equipment manufacturing

Table 13.28 presents the recent and longer-term direct contribution of engineering, and machinery and equipment manufacturing employment to the Waitaki District economy.

Table 13.28 Engineering, and machinery and equipment manufacturing employment in Waitaki District

	Year ending March				*%pa change*	
Engineering, machinery & equip mfg sector employment (FTEs)	1999	2007	2008	2009	*2008 to 2009*	*1999 to 2009*
Machinery and Equipment Manufacturing	82	35	74	80	*8.0*	*-0.2*
Consultant Engineering Services	6	9	11	12	*2.6*	*6.9*
Engineering, machinery & equip mfg sector	**88**	**44**	**86**	**92**	***7.3***	***0.5***
Total employment: Waitaki District	**7,657**	**8,608**	**8,442**	**8,886**	***5.3***	***1.5***

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Table 13.29 presents the recent and longer-term direct contribution of engineering, and machinery and equipment manufacturing GDP to the Waitaki District economy.

Table 13.29 Engineering, and machinery and equipment manufacturing GDP in Waitaki District

Engineering, machinery & equip mfg sector GDP (2009$m)	Year ending March 1999	2007	2008	2009	%pa change 2008 to 2009	1999 to 2009
Machinery and Equipment Manufacturing	6.0	2.9	6.4	6.6	*3.2*	*0.9*
Consultant Engineering Services	0.4	0.6	0.8	0.8	*4.2*	*7.0*
Engineering, machinery & equip mfg sector	**6.4**	**3.5**	**7.2**	**7.4**	***3.3***	***1.4***
Total GDP: Waitaki District	**722**	**817**	**848**	**871**	***2.7***	***1.9***

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Table 13.30 presents the recent and longer-term direct contribution of engineering, and machinery and equipment manufacturing businesses to the Waitaki District economy.

Table 13.30 Engineering, and machinery and equipment manufacturing businesses in Waitaki District

Engineering, machinery & equip mfg sector business units	Year ending March 1999	2007	2008	2009	%pa change 2008 to 2009	1999 to 2009
Machinery and Equipment Manufacturing	14	20	19	20	*5.3*	*3.6*
Consultant Engineering Services	5	8	7	8	*14.3*	*4.8*
Engineering, machinery & equip mfg sector	**19**	**28**	**26**	**28**	***7.7***	***4.0***
Total business units: Waitaki District	**2,458**	**2,841**	**2,853**	**2,877**	***0.8***	***1.6***

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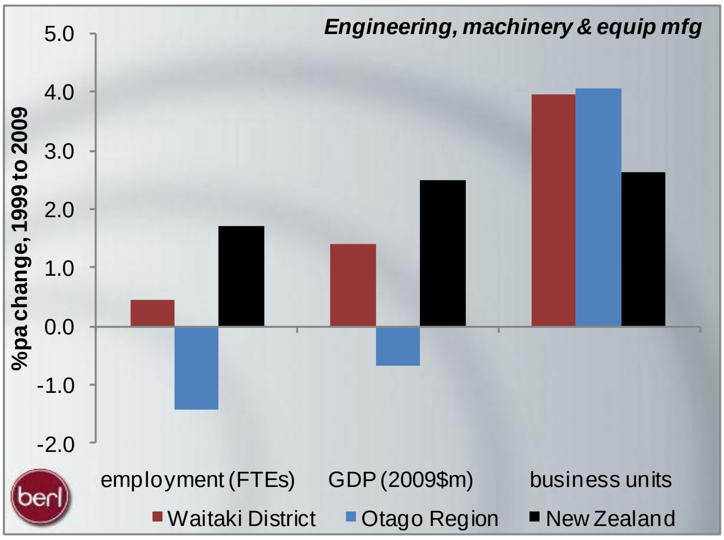
Figure 13.10 shows the change in employment, GDP and business units in the engineering, and machinery and equipment manufacturing sector in Waitaki District and at a regional and national level since 1999.

Figure 13.10 Engineering, and machinery and equipment manufacturing sector growth, Waitaki District, Otago Region, New Zealand



The Waitaki District has enjoyed growth in employment, GDP and business units in the sector since 1999. The sector has seen strong labour productivity growth, while business numbers have increased at a faster rate than nationally, albeit off a small base.

13.6.7 The housing market

This section summarises changes in house sales and house prices in the Waitaki District and compares these changes to what is happening nationally.

Table 13.31 presents the number of house sales in the Waitaki District and New Zealand for the last five years.

Table 13.31 House Sales, 2005 to 2009

	Year ending					%pa change	
House sales	**Jun-05**	**Jun-06**	**Jun-07**	**Jun-08**	**Jun-09**	***2008 to 2009***	***2005 to 2009***
Waitaki District	608	533	687	466	363	*-22.1*	*-12.1*
New Zealand	94,868	87,978	95,000	60,499	52,829	*-12.7*	*-13.6*

Quotable Value

House sales continued their dramatic fall in the District to June 2009, down almost 50 percent from the peak of June 2007, and lower than at any point in the last five years. This was much in line with the national decline in house sales.

Table 13.32 presents average house prices for the Waitaki District and New Zealand for the five years to June 2009.

Table 13.32 House Prices, 2005 to 2009

	Year ending					%pa change	
House prices	**Jun-05**	**Jun-06**	**Jun-07**	**Jun-08**	**Jun-09**	***2008 to 2009***	***2005 to 2009***
Waitaki District	159,975	169,926	196,335	215,911	215,344	*-0.3*	*7.7*
New Zealand	308,788	340,978	389,564	404,084	397,195	*-1.7*	*6.5*

Quotable Value

Prices stabilised at around $215,000 in the Waitaki District in the June 2009 year, while they fell 1.7 percent nationally. The average house costs 46 percent less in the District than in New Zealand as a whole.

Since 2005, house prices in the District have risen far more quickly than in New Zealand overall, up 7.7 percent a year. Almost all of this growth occurred in the two years from 2006 to 2008.

14 Data appendices

14.1 Otago Region

Table 14.1 Employment in Otago Region

Employment for Otago Region	1994	1999	2004	2005	2006	2007	2008	2009	change 2008-09		% change
									Number	%	1999 to 2009
Agriculture	7,203	6,698	6,905	6,528	7,490	7,978	8,005	7,999	-6	-0.1	1.8
Services to Agriculture; Hunting and Trapping	907	1,201	1,980	2,021	1,666	1,565	1,386	1,490	104	7.5	2.2
Forestry and Logging	396	390	532	554	436	409	404	396	-8	-2.0	0.1
Commercial Fishing	188	135	145	134	113	119	123	138	15	12.0	0.2
Coal Mining	10	9	9	8	7	8	7	11	3	44.7	1.8
Oil and Gas Exploration	0	0	0	0	0	0	0	0	0	na	na
Metal Ore Mining	12	270	111	135	89	139	151	188	36	24.0	-3.6
Other Mining	119	136	164	126	128	109	94	85	-9	-9.5	-4.6
Services to Mining	9	6	3	6	2	58	77	83	6	8.4	30.1
Primary	*8,844*	*8,845*	*9,850*	*9,511*	*9,932*	*10,383*	*10,247*	*10,389*	*141*	*1.4*	*1.6*
Food, Beverage and Tobacco	5,726	4,100	5,112	5,032	4,652	4,541	4,355	4,455	100	2.3	0.8
Textile, Clothing, Footwear & Leather Mfg	1,663	1,201	1,152	906	878	749	779	681	-98	-12.6	-5.5
Wood and Paper Product Manufacturing	877	780	891	1,019	960	1,005	925	904	-21	-2.2	1.5
Printing, Publishing and Recorded Media	925	929	1,090	1,310	1,189	1,154	1,064	1,011	-53	-4.9	0.9
Petroleum, Coal, Chemical & Assoc Prod Mfg	248	285	352	339	240	192	217	264	47	21.7	-0.7
Non-Metallic Mineral Product Manufacturing	220	157	331	336	337	350	348	341	-7	-1.9	8.1
Metal Product Manufacturing	880	696	916	887	958	1,008	1,038	995	-44	-4.2	3.6
Machinery and Equipment Manufacturing	1,669	1,653	2,016	2,007	1,884	1,754	1,761	1,208	-552	-31.4	-3.1
Other Manufacturing	338	322	350	351	343	354	353	318	-34	-9.7	-0.1
Manufacturing	*12,546*	*10,123*	*12,210*	*12,187*	*11,442*	*11,106*	*10,839*	*10,178*	*-661*	*-6.1*	*0.1*
General Construction	2,366	2,018	3,283	3,685	3,820	3,745	4,056	3,885	-172	-4.2	6.8
Construction Trade Services	2,464	2,247	3,298	3,791	4,187	4,153	4,321	4,306	-14	-0.3	6.7
Construction	*4,830*	*4,265*	*6,581*	*7,476*	*8,007*	*7,898*	*8,377*	*8,191*	*-186*	*-2.2*	*6.7*
Basic Material Wholesaling	1,047	820	1,060	1,150	1,247	1,338	1,322	1,291	-31	-2.4	4.6
Machinery and Motor Vehicle Wholesaling	819	750	918	1,054	1,112	1,083	993	989	-4	-0.4	2.8
Personal and Household Good Wholesaling	1,028	995	1,188	1,223	1,261	1,254	1,259	1,398	139	11.0	3.5
Food Retailing	2,890	2,912	3,280	3,234	3,581	3,781	3,796	3,949	154	4.1	3.1
Personal and Household Good Retailing	3,859	3,507	4,327	4,341	4,686	4,574	4,570	4,520	-50	-1.1	2.6
Motor Vehicle Retailing and Services	2,099	2,077	2,330	2,164	2,199	2,198	2,168	2,175	6	0.3	0.5
Accommodation, Cafes and Restaurants	4,166	4,855	6,507	6,614	6,997	7,163	6,531	6,447	-84	-1.3	2.9
Road Transport	1,665	1,622	1,899	1,842	1,799	1,733	1,757	1,719	-37	-2.1	0.6
Rail Transport	146	106	51	45	44	31	38	39	1	2.9	-9.5
Water Transport	89	103	137	147	171	134	110	143	33	30.6	3.3
Air and Space Transport	151	151	189	203	201	199	203	249	46	22.8	5.1
Other Transport	0	3	6	16	18	28	30	15	-14	-48.5	17.7
Services to Transport	664	610	780	831	859	926	886	906	20	2.2	4.0
Storage	42	193	215	209	124	11	71	73	2	3.2	-9.2
Retail and Distribution	*18,665*	*18,704*	*22,887*	*23,075*	*24,299*	*24,452*	*23,733*	*23,914*	*181*	*0.8*	*2.5*
Electricity and Gas Supply	526	528	184	274	240	207	235	238	4	1.5	-7.6
Water Supply, Sewerage and Drainage Services	149	120	105	106	111	99	117	118	2	1.5	-0.1
Communication Services	774	700	701	653	674	579	546	599	52	9.6	-1.5
Finance	1,301	810	792	771	865	1,019	1,044	1,066	22	2.1	2.8
Insurance	280	134	96	91	105	97	99	104	5	4.7	-2.5
Services to Finance and Insurance	296	313	439	464	479	553	603	599	-3	-0.5	6.7
Property Services	1,275	1,316	1,599	1,676	1,683	1,687	1,629	1,676	47	2.9	2.4
Business Services	3,672	4,483	6,167	6,780	7,516	8,202	9,275	9,114	-161	-1.7	7.4
Business Services	*8,273*	*8,404*	*10,083*	*10,815*	*11,673*	*12,444*	*13,548*	*13,516*	*-32*	*-0.2*	*4.9*
Motion Picture, Radio and Television Services	287	323	370	407	392	385	411	299	-113	-27.4	-0.8
Libraries, Museums and the Arts	407	511	650	795	855	843	872	735	-137	-15.7	3.7
Sport and Recreation	920	797	1,563	1,611	1,744	1,671	1,663	1,808	145	8.7	8.5
Personal Services	1,008	941	1,216	1,290	1,378	1,431	1,391	1,405	14	1.0	4.1
Other Services	1,089	998	1,296	1,335	1,503	1,597	1,621	1,761	141	8.7	5.8
Private Households Employing Staff	23	0	0	0	0	0	0	0	0	na	na
Recreation Services	*3,735*	*3,570*	*5,096*	*5,438*	*5,872*	*5,926*	*5,958*	*6,009*	*50*	*0.8*	*5.3*
Government Administration	2,473	1,777	1,581	1,528	1,616	1,642	1,752	1,876	124	7.1	0.5
Defence	79	200	147	155	160	141	134	119	-15	-11.2	-5.1
Education	6,657	6,653	7,103	7,551	7,481	7,954	7,944	8,337	393	4.9	2.3
Health Services	4,650	4,087	4,667	5,094	5,054	5,032	5,161	5,590	429	8.3	3.2
Community Services	1,106	2,311	2,466	2,738	2,717	2,687	2,745	3,011	266	9.7	2.7
Social Services	*14,965*	*15,028*	*15,964*	*17,066*	*17,028*	*17,455*	*17,737*	*18,934*	*1,197*	*6.7*	*2.3*
TOTAL ALL INDUSTRIES	**71,859**	**68,939**	**82,672**	**85,568**	**88,252**	**89,664**	**90,440**	**91,130**	***690***	***0.8***	***2.8***
Incl. Tourism	4,219	4,502	5,797	5,900	6,185	6,271	6,007	6,011	*4*	*0.1*	*2.9*

Table 14.2 Real GDP in Otago Region (2009$m)

Real GDP in 2009$m for Otago Region	1994	1999	2004	2005	2006	2007	2008	2009	change 2008-09 Number	change 2008-09 %	% Change 1999 to 2009
Agriculture	327	420	511	491	543	586	577	573	-4	-0.6	3.2
Services to Agriculture; Hunting and Trapping	41	55	69	69	68	57	51	49	-2	-3.8	-1.1
Forestry and Logging	74	79	114	125	118	128	134	124	-10	-7.3	4.6
Commercial Fishing	18	11	10	9	9	9	8	9	0	2.9	-2.3
Coal Mining	2	3	2	1	2	2	2	2	0	11.1	-0.4
Oil and Gas Exploration	0	0	0	0	0	0	0	0	0	na	na
Metal Ore Mining	3	80	39	61	35	36	59	56	-3	-4.5	-3.6
Other Mining	21	31	30	22	25	19	24	22	-2	-7.6	-3.4
Services to Mining	3	2	0	0	0	2	3	3	0	-9.6	6.5
Primary	*487*	*681*	*774*	*779*	*800*	*840*	*858*	*838*	*-20*	*-2.3*	*2.1*
Food, Beverage and Tobacco	606	489	721	695	669	657	634	630	-4	-0.7	2.6
Textile, Clothing, Footwear & Leather Mfg	72	77	65	55	53	51	57	47	-9	-16.4	-4.7
Wood and Paper Product Manufacturing	83	85	106	129	125	133	135	129	-5	-4.1	4.3
Printing, Publishing and Recorded Media	78	82	95	116	104	107	106	101	-5	-4.5	2.2
Petroleum, Coal, Chemical & Assoc Prod Mfg	25	35	42	42	27	24	28	33	5	18.1	-0.5
Non-Metallic Mineral Product Manufacturing	26	19	51	51	53	55	54	51	-3	-5.8	10.1
Metal Product Manufacturing	67	61	99	91	98	100	105	91	-14	-13.4	4.1
Machinery and Equipment Manufacturing	107	121	167	171	159	143	151	99	-52	-34.4	-2.0
Other Manufacturing	14	16	19	19	20	20	20	17	-3	-15.8	0.5
Manufacturing	*1,080*	*985*	*1,364*	*1,369*	*1,307*	*1,291*	*1,289*	*1,198*	*-91*	*-7.0*	*2.0*
General Construction	133	123	238	256	258	237	258	239	-19	-7.3	6.9
Construction Trade Services	133	116	192	214	230	218	234	223	-11	-4.7	6.8
Construction	*267*	*238*	*430*	*469*	*488*	*455*	*492*	*462*	*-30*	*-6.1*	*6.8*
Basic Material Wholesaling	101	92	123	129	137	141	142	136	-6	-4.0	3.9
Machinery and Motor Vehicle Wholesaling	88	83	110	123	130	130	123	114	-9	-7.2	3.3
Personal and Household Good Wholesaling	104	110	142	142	149	150	154	166	11	7.5	4.2
Food Retailing	117	132	160	170	188	200	210	206	-4	-1.8	4.5
Personal and Household Good Retailing	154	159	220	232	248	244	252	242	-10	-4.0	4.3
Motor Vehicle Retailing and Services	90	93	125	124	128	134	141	143	2	1.5	4.4
Accommodation, Cafes and Restaurants	152	174	221	235	241	242	224	214	-10	-4.5	2.1
Road Transport	111	121	151	152	153	147	156	149	-7	-4.3	2.1
Rail Transport	22	20	18	14	13	10	12	11	-1	-8.2	-5.7
Water Transport	12	20	21	24	26	22	19	26	6	32.2	2.5
Air and Space Transport	17	21	29	33	32	33	35	38	3	9.0	5.8
Other Transport	0	0	0	0	0	0	0	0	0	-49.5	8.3
Services to Transport	82	88	116	130	134	141	139	143	4	3.1	5.0
Storage	6	18	16	14	8	1	4	4	0	-3.2	-13.1
Retail and Distribution	*1,055*	*1,131*	*1,454*	*1,524*	*1,586*	*1,594*	*1,611*	*1,591*	*-19*	*-1.2*	*3.5*
Electricity and Gas Supply	148	281	107	163	145	119	120	120	0	0.2	-8.1
Water Supply, Sewerage and Drainage Services	16	17	18	18	18	18	17	16	-1	-5.8	-0.4
Communication Services	120	151	237	235	255	250	233	276	42	18.2	6.2
Finance	207	178	217	215	228	276	308	326	17	5.7	6.2
Insurance	35	23	23	23	27	23	25	25	0	2.0	0.7
Services to Finance and Insurance	28	33	41	47	48	54	61	64	4	6.1	7.0
Property Services	939	828	987	996	1,024	1,049	1,026	1,080	54	5.2	2.7
Business Services	296	322	441	464	527	567	660	659	-1	-0.2	7.4
Business Services	*1,789*	*1,832*	*2,071*	*2,160*	*2,272*	*2,355*	*2,450*	*2,565*	*116*	*4.7*	*3.4*
Motion Picture, Radio and Television Services	29	37	48	50	45	46	50	40	-9	-18.8	0.8
Libraries, Museums and the Arts	15	16	24	28	28	30	30	27	-3	-9.1	5.3
Sport and Recreation	68	59	121	117	121	117	112	120	8	7.3	7.5
Personal Services	37	51	69	72	76	84	83	84	1	0.9	5.1
Other Services	21	32	40	41	44	48	48	49	0	0.8	4.3
Private Households Employing Staff	1	0	0	0	0	0	0	0	0	na	na
Recreation Services	*169*	*195*	*303*	*309*	*314*	*326*	*323*	*321*	*-3*	*-0.9*	*5.1*
Government Administration	257	219	209	208	209	222	243	245	2	0.8	1.1
Defence	4	14	12	15	14	13	13	11	-2	-16.7	-2.3
Education	322	325	395	407	418	409	408	394	-13	-3.3	2.0
Health Services	289	318	346	377	381	383	401	422	21	5.3	2.9
Community Services	73	82	79	85	88	84	89	91	2	2.2	1.0
Social Services	*945*	*957*	*1,041*	*1,091*	*1,110*	*1,111*	*1,153*	*1,163*	*10*	*0.8*	*2.0*
TOTAL ALL INDUSTRIES	**5,793**	**6,020**	**7,437**	**7,702**	**7,878**	**7,971**	**8,176**	**8,139**	***-37***	***-0.5***	***3.1***
Incl. Tourism	235	260	333	352	363	362	360	359	*0*	*0.0*	*3.3*

Table 14.3 Activity units in Otago Region

Business units for Otago Region	1994	1999	2004	2005	2006	2007	2008	2009	change 2008-09 Number	change 2008-09 %	Change 1999 to 2009
Agriculture	4,956	4,655	4,242	4,166	4,157	4,067	3,925	3,835	-90	-2.3	-1.9
Services to Agriculture; Hunting and Trapping	224	265	415	467	502	531	511	515	4	0.8	6.9
Forestry and Logging	190	358	486	479	442	448	461	439	-22	-4.8	2.1
Commercial Fishing	89	92	106	97	90	89	87	82	-5	-5.7	-1.1
Coal Mining	3	3	1	1	1	1	1	1	0	0.0	-10.4
Oil and Gas Exploration	0	0	0	0	0	0	0	0	0	na	na
Metal Ore Mining	12	16	9	8	7	7	9	9	0	0.0	-5.6
Other Mining	21	19	20	22	30	27	25	24	-1	-4.0	2.4
Services to Mining	0	2	4	5	4	8	8	8	0	0.0	14.9
Primary	*5,495*	*5,410*	*5,283*	*5,245*	*5,233*	*5,178*	*5,027*	*4,913*	*-114*	*-2.3*	*-1.0*
Food, Beverage and Tobacco	108	103	127	128	130	135	141	137	-4	-2.8	2.9
Textile, Clothing, Footwear & Leather Mfg	88	81	86	82	80	80	71	68	-3	-4.2	-1.7
Wood and Paper Product Manufacturing	101	103	116	128	127	121	122	117	-5	-4.1	1.3
Printing, Publishing and Recorded Media	56	68	69	70	77	80	70	71	1	1.4	0.4
Petroleum, Coal, Chemical & Assoc Prod Mfg	32	33	39	40	36	38	37	38	1	2.7	1.4
Non-Metallic Mineral Product Manufacturing	39	44	52	50	55	56	59	53	-6	-10.2	1.9
Metal Product Manufacturing	109	116	136	146	155	153	155	143	-12	-7.7	2.1
Machinery and Equipment Manufacturing	202	192	226	226	234	232	236	246	10	4.2	2.5
Other Manufacturing	89	88	104	110	108	101	100	99	-1	-1.0	1.2
Manufacturing	*824*	*828*	*955*	*980*	*1,002*	*996*	*991*	*972*	*-19*	*-1.9*	*1.6*
General Construction	546	524	847	967	1,074	1,164	1,245	1,253	8	0.6	9.1
Construction Trade Services	764	819	1,193	1,346	1,470	1,496	1,595	1,603	8	0.5	6.9
Construction	*1,310*	*1,343*	*2,040*	*2,313*	*2,544*	*2,660*	*2,840*	*2,856*	*16*	*0.6*	*7.8*
Basic Material Wholesaling	196	194	225	228	240	242	246	251	5	2.0	2.6
Machinery and Motor Vehicle Wholesaling	206	206	235	259	256	254	253	248	-5	-2.0	1.9
Personal and Household Good Wholesaling	234	261	273	265	270	285	294	294	0	0.0	1.2
Food Retailing	546	499	493	500	492	502	499	499	0	0.0	0.0
Personal and Household Good Retailing	1,071	990	1,115	1,140	1,153	1,191	1,219	1,236	17	1.4	2.2
Motor Vehicle Retailing and Services	504	512	519	526	537	531	541	530	-11	-2.0	0.3
Accommodation, Cafes and Restaurants	671	830	1,128	1,180	1,207	1,219	1,221	1,256	35	2.9	4.2
Road Transport	384	411	467	483	488	479	478	464	-14	-2.9	1.2
Rail Transport	32	31	6	6	6	5	5	5	0	0.0	-16.7
Water Transport	1	8	15	17	17	19	16	13	-3	-18.8	5.0
Air and Space Transport	35	44	51	49	54	56	57	54	-3	-5.3	2.1
Other Transport	0	2	8	8	10	8	9	15	6	66.7	22.3
Services to Transport	111	126	168	169	184	198	202	201	-1	-0.5	4.8
Storage	14	18	23	26	28	28	23	25	2	8.7	3.3
Retail and Distribution	*4,005*	*4,132*	*4,726*	*4,856*	*4,942*	*5,017*	*5,063*	*5,091*	*28*	*0.6*	*2.1*
Electricity and Gas Supply	32	34	17	20	18	19	19	20	1	5.3	-5.2
Water Supply, Sewerage and Drainage Services	29	11	11	8	6	11	13	18	5	38.5	5.0
Communication Services	112	187	182	196	185	183	197	207	10	5.1	1.0
Finance	314	238	474	634	781	941	1,055	1,104	49	4.6	16.6
Insurance	151	80	41	40	42	36	36	37	1	2.8	-7.4
Services to Finance and Insurance	115	121	174	195	210	218	228	229	1	0.4	6.6
Property Services	1,409	2,072	3,808	4,180	4,553	4,852	5,125	5,287	162	3.2	9.8
Business Services	803	1,181	1,671	1,804	1,933	1,976	2,078	2,149	71	3.4	6.2
Business Services	*2,965*	*3,924*	*6,378*	*7,077*	*7,728*	*8,236*	*8,751*	*9,051*	*300*	*3.4*	*8.7*
Motion Picture, Radio and Television Services	56	70	117	131	130	138	138	134	-4	-2.9	6.7
Libraries, Museums and the Arts	111	151	176	193	209	206	232	219	-13	-5.6	3.8
Sport and Recreation	434	404	483	503	505	515	529	541	12	2.3	3.0
Personal Services	297	352	456	471	509	533	532	555	23	4.3	4.7
Other Services	246	320	375	398	396	390	405	407	2	0.5	2.4
Private Households Employing Staff	0	0	1	0	0	0	0	0	0	na	na
Recreation Services	*1,144*	*1,297*	*1,608*	*1,696*	*1,749*	*1,782*	*1,836*	*1,856*	*20*	*1.1*	*3.6*
Government Administration	211	143	130	111	110	111	115	116	1	0.9	-2.1
Defence	5	4	5	8	8	8	7	7	0	0.0	5.8
Education	367	401	412	421	419	411	429	441	12	2.8	1.0
Health Services	454	581	723	743	782	808	831	847	16	1.9	3.8
Community Services	58	195	196	201	199	196	202	217	15	7.4	1.1
Social Services	*1,095*	*1,324*	*1,466*	*1,484*	*1,518*	*1,534*	*1,584*	*1,628*	*44*	*2.8*	*2.1*
TOTAL ALL INDUSTRIES	**16,838**	**18,258**	**22,456**	**23,651**	**24,716**	**25,403**	**26,092**	**26,367**	***275***	***1.1***	***3.7***
Incl. Tourism	852	960	1,205	1,251	1,286	1,303	1,315	1,329	*14*	*1.1*	*3.3*

Table 14.4 Summary indicators, Otago Region

BERL Database of TLA ANZSIC Employment, GDP and Business Units

	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Resident population																
Otago Region	187,726	190,160	186,960	184,029	183,392	182,462	182,253	183,107	186,493	188,602	190,660	192,139	195,348	197,179	199,017	200,666
Excl. Q-L District	172,192	173,517	172,677	169,328	168,404	167,140	166,215	166,067	168,157	168,885	169,514	169,755	172,392	172,984	173,868	174,849
New Zealand	3,432,876	3,482,116	3,618,303	3,622,904	3,652,548	3,670,278	3,689,862	3,737,277	3,792,518	3,859,556	3,909,606	3,945,485	4,027,947	4,070,191	4,109,450	4,154,789
Real Value Added GDP (1996$m)																
Otago Region	4,185	4,279	4,365	4,315	4,317	4,348	4,557	4,684	4,851	5,100	5,372	5,563	5,690	5,758	5,906	5,879
Excl. Q-L District	3,819	3,868	3,946	3,900	3,904	3,918	4,055	4,141	4,273	4,447	4,648	4,773	4,847	4,898	5,029	4,979
New Zealand	85,136	89,675	93,420	96,666	98,335	98,842	104,096	106,553	110,407	115,829	120,813	125,361	129,079	131,438	135,543	134,028
Real Value Added GDP (2009$m)																
Otago Region	5,793	5,924	6,044	5,974	5,977	6,020	6,309	6,485	6,716	7,061	7,437	7,702	7,878	7,971	8,176	8,139
Excl. Q-L District	5,288	5,355	5,463	5,400	5,405	5,424	5,614	5,733	5,915	6,157	6,435	6,608	6,711	6,781	6,962	6,894
New Zealand	117,866	124,150	129,334	133,828	136,139	136,841	144,115	147,516	152,852	160,358	167,258	173,555	178,702	181,968	187,651	185,554
GDP per capita 1996$																
Otago Region	22,291	22,502	23,350	23,449	23,540	23,830	25,003	25,580	26,011	27,042	28,175	28,954	29,129	29,199	29,675	29,297
Excl. Q-L District	22,181	22,293	22,854	23,035	23,181	23,439	24,395	24,934	25,409	26,333	27,419	28,116	28,117	28,316	28,924	28,478
New Zealand	24,800	25,753	25,819	26,682	26,922	26,930	28,211	28,511	29,112	30,011	30,902	31,773	32,046	32,293	32,983	32,259
GDP per capita 2009$																
Otago Region	30,860	31,153	32,326	32,463	32,590	32,991	34,615	35,414	36,011	37,438	39,006	40,085	40,328	40,425	41,083	40,561
Excl. Q-L District	30,708	30,864	31,640	31,891	32,093	32,450	33,774	34,520	35,177	36,457	37,959	38,926	38,926	39,202	40,044	39,426
New Zealand	34,334	35,654	35,744	36,940	37,272	37,284	39,057	39,472	40,304	41,548	42,781	43,988	44,366	44,707	45,663	44,660
Employment (FTEs)																
Otago Region	71,859	73,000	73,782	70,153	69,426	68,939	72,437	74,292	77,358	80,277	82,672	85,568	88,252	89,664	90,440	91,130
Excl. Q-L District	65,312	65,573	66,320	62,991	62,318	61,604	63,638	64,748	67,422	69,048	70,415	72,294	74,072	75,175	76,029	76,558
New Zealand	1,378,150	1,440,499	1,484,116	1,450,580	1,470,636	1,473,526	1,516,853	1,532,228	1,581,797	1,640,202	1,690,545	1,751,247	1,808,677	1,840,284	1,854,636	1,866,747
Productivity (GDP per FTE employed 1996$) #																
Otago Region	52,723	53,269	53,947	56,258	56,991	57,852	58,011	58,246	58,063	58,972	60,404	60,528	60,083	59,853	60,938	60,104
Excl. Q-L District	52,946	53,610	54,254	56,632	57,411	58,329	58,757	59,083	58,679	59,786	61,361	61,465	60,977	60,735	61,726	60,596
New Zealand	55,929	56,573	57,393	60,948	61,282	61,527	63,284	64,246	64,630	65,551	66,434	66,644	66,501	66,574	68,200	66,891
Productivity (GDP per FTE employed 2009$) #																
Otago Region	72,992	73,748	74,686	77,886	78,900	80,092	80,312	80,639	80,385	81,644	83,626	83,797	83,181	82,863	84,365	83,210
Excl. Q-L District	73,300	74,219	75,112	78,404	79,483	80,753	81,346	81,796	81,237	82,771	84,950	85,095	84,419	84,084	85,456	83,891
New Zealand	77,431	78,322	79,458	84,379	84,841	85,181	87,613	88,945	89,476	90,751	91,974	92,264	92,067	92,168	94,419	92,607
Business units (number)																
Otago Region	16,838	17,819	17,867	17,606	18,192	18,258	18,930	19,253	19,982	20,835	22,456	23,651	24,716	25,403	26,092	26,367
Excl. Q-L District	14,921	15,586	15,642	15,398	15,837	15,809	16,112	16,260	16,596	16,973	17,970	18,677	19,296	19,671	20,021	20,181
New Zealand	314,311	345,019	350,091	354,106	376,513	379,701	406,567	403,645	408,416	422,548	453,662	474,007	490,474	500,728	511,030	512,580
Business size (FTEs per business unit)																
Otago Region	4.3	4.1	4.1	4.0	3.8	3.8	3.8	3.9	3.9	3.9	3.7	3.6	3.6	3.5	3.5	3.5
Excl. Q-L District	4.4	4.2	4.2	4.1	3.9	3.9	3.9	4.0	4.1	4.1	3.9	3.9	3.8	3.8	3.8	3.8
New Zealand	4.4	4.2	4.2	4.1	3.9	3.9	3.7	3.8	3.9	3.9	3.7	3.7	3.7	3.7	3.6	3.6

 # excluded owner-occupied dwellings sector

14.2 Central Otago District

Table 14.5 Employment in Central Otago District

									change 2008-09		% change
Employment for Central Otago District	1994	1999	2004	2005	2006	2007	2008	2009	Number	%	1999 to 2009
Agriculture	1,726	1,506	1,558	1,478	1,674	2,108	2,176	2,243	67	3.1	4.1
Services to Agriculture; Hunting and Trapping	327	443	834	847	599	545	441	520	78	17.7	1.6
Forestry and Logging	20	18	24	19	15	14	14	15	1	9.0	-1.6
Commercial Fishing	2	0	3	3	2	3	3	3	0	3.4	na
Coal Mining	7	0	0	0	0	0	0	0	0	na	na
Oil and Gas Exploration	0	0	0	0	0	0	0	0	0	na	na
Metal Ore Mining	9	18	3	3	2	3	2	3	0	11.7	-17.4
Other Mining	2	3	0	0	7	13	19	11	-7	-38.8	14.4
Services to Mining	0	0	0	0	0	3	3	3	0	4.3	na
Primary	*2,092*	*1,988*	*2,422*	*2,349*	*2,300*	*2,690*	*2,658*	*2,798*	*140*	*5.3*	*3.5*
Food, Beverage and Tobacco	118	194	284	301	294	114	140	209	68	48.8	0.7
Textile, Clothing, Footwear & Leather Mfg	7	3	3	0	11	25	40	40	0	0.5	29.6
Wood and Paper Product Manufacturing	64	43	43	62	64	65	53	51	-2	-4.0	1.7
Printing, Publishing and Recorded Media	29	30	29	25	25	22	21	13	-8	-36.7	-7.8
Petroleum, Coal, Chemical & Assoc Prod Mfg	3	6	15	11	14	8	11	11	0	2.3	6.7
Non-Metallic Mineral Product Manufacturing	27	36	39	42	47	51	58	54	-3	-5.9	4.2
Metal Product Manufacturing	35	18	30	34	52	57	60	57	-2	-4.1	12.2
Machinery and Equipment Manufacturing	58	39	70	56	62	30	50	51	1	2.7	2.7
Other Manufacturing	12	21	12	14	11	14	5	6	0	2.2	-12.4
Manufacturing	*353*	*390*	*524*	*547*	*581*	*387*	*437*	*492*	*55*	*12.5*	*2.4*
General Construction	239	209	654	738	731	658	787	717	-70	-8.8	13.1
Construction Trade Services	272	312	313	372	394	420	444	480	36	8.0	4.4
Construction	*510*	*521*	*967*	*1,111*	*1,125*	*1,078*	*1,231*	*1,197*	*-34*	*-2.8*	*8.7*
Basic Material Wholesaling	75	71	107	91	120	117	136	147	10	7.6	7.5
Machinery and Motor Vehicle Wholesaling	45	55	42	49	77	71	52	69	16	31.3	2.2
Personal and Household Good Wholesaling	31	52	70	71	89	112	110	115	5	4.7	8.3
Food Retailing	265	261	296	291	348	346	340	372	32	9.5	3.6
Personal and Household Good Retailing	313	252	247	272	286	325	320	329	9	2.9	2.7
Motor Vehicle Retailing and Services	267	223	240	216	215	213	217	205	-12	-5.5	-0.8
Accommodation, Cafes and Restaurants	236	296	386	409	476	552	560	557	-3	-0.6	6.5
Road Transport	132	170	216	217	207	192	234	272	39	16.6	4.8
Rail Transport	3	3	0	0	0	0	0	0	0	na	-100.0
Water Transport	0	0	0	0	0	0	0	0	0	na	na
Air and Space Transport	0	3	3	3	3	3	3	3	0	4.2	-0.4
Other Transport	0	0	0	5	5	9	12	8	-4	-31.2	na
Services to Transport	14	12	6	8	16	22	32	20	-12	-36.4	5.3
Storage	0	3	3	3	3	3	3	3	0	8.7	0.8
Retail and Distribution	*1,381*	*1,401*	*1,616*	*1,633*	*1,845*	*1,966*	*2,017*	*2,099*	*82*	*4.1*	*4.1*
Electricity and Gas Supply	152	150	54	59	68	68	68	65	-3	-4.8	-8.0
Water Supply, Sewerage and Drainage Services	0	0	3	3	3	2	3	3	0	4.0	na
Communication Services	48	56	56	48	63	57	32	38	6	18.0	-3.9
Finance	89	50	52	51	60	61	63	62	-1	-1.1	2.2
Insurance	5	15	3	6	6	6	6	9	3	53.1	-4.5
Services to Finance and Insurance	16	12	23	23	18	21	16	24	8	53.4	7.1
Property Services	95	105	162	139	146	158	145	170	25	17.5	5.0
Business Services	302	277	463	443	569	654	931	1,091	160	17.2	14.7
Business Services	*707*	*665*	*817*	*771*	*933*	*1,027*	*1,263*	*1,462*	*199*	*15.8*	*8.2*
Motion Picture, Radio and Television Services	18	12	21	20	19	9	11	7	-4	-36.4	-5.1
Libraries, Museums and the Arts	8	24	25	31	33	31	37	27	-10	-26.5	1.2
Sport and Recreation	40	36	53	61	70	79	93	95	2	2.4	10.2
Personal Services	71	64	49	74	101	77	80	100	19	24.0	4.5
Other Services	29	37	56	72	83	90	106	117	10	9.7	12.2
Private Households Employing Staff	3	0	0	0	0	0	0	0	0	na	na
Recreation Services	*169*	*173*	*204*	*258*	*307*	*286*	*328*	*346*	*18*	*5.5*	*7.2*
Government Administration	135	103	111	88	84	74	93	106	14	14.6	0.3
Defence	0	0	0	5	3	5	9	9	0	3.3	na
Education	295	323	302	318	300	316	341	380	39	11.5	1.6
Health Services	306	246	325	328	281	281	279	347	67	24.1	3.5
Community Services	26	84	127	117	124	140	134	158	24	17.7	6.5
Social Services	*763*	*756*	*864*	*856*	*791*	*817*	*856*	*1,000*	*144*	*16.8*	*2.8*
TOTAL ALL INDUSTRIES	**5,975**	**5,894**	**7,414**	**7,525**	**7,880**	**8,251**	**8,790**	**9,394**	***604***	***6.9***	***4.8***
Incl. Tourism	261	293	342	362	403	438	459	458	*-1*	*-0.2*	*4.5*

Table 14.6 Real GDP in Central Otago District (2009$m)

Real GDP in 2009$m for Central Otago District	1994	1999	2004	2005	2006	2007	2008	2009	change 2008-09		% Change 1999 to 2009
									Number	%	
Agriculture	78	94	115	111	121	155	157	161	4	2.5	5.5
Services to Agriculture; Hunting and Trapping	15	20	29	29	24	20	16	17	1	5.4	-1.6
Forestry and Logging	4	4	5	4	4	5	5	5	0	3.1	2.8
Commercial Fishing	0	0	0	0	0	0	0	0	0	-5.0	na
Coal Mining	1	0	0	0	0	0	0	0	0	na	na
Oil and Gas Exploration	0	0	0	0	0	0	0	0	0	na	na
Metal Ore Mining	2	5	1	1	1	1	1	1	0	-14.0	-17.4
Other Mining	0	1	0	0	1	2	5	3	-2	-37.5	15.7
Services to Mining	0	0	0	0	0	0	0	0	0	-13.0	na
Primary	*101*	*124*	*151*	*146*	*152*	*183*	*184*	*187*	*3*	*1.7*	*4.1*
Food, Beverage and Tobacco	13	23	40	42	42	16	20	29	9	44.6	2.5
Textile, Clothing, Footwear & Leather Mfg	0	0	0	0	1	2	3	3	0	-3.9	30.7
Wood and Paper Product Manufacturing	6	5	5	8	8	9	8	7	0	-5.8	4.5
Printing, Publishing and Recorded Media	2	3	3	2	2	2	2	1	-1	-36.4	-6.6
Petroleum, Coal, Chemical & Assoc Prod Mfg	0	1	2	1	2	1	1	1	0	-0.8	6.9
Non-Metallic Mineral Product Manufacturing	3	4	6	6	7	8	9	8	-1	-9.7	6.2
Metal Product Manufacturing	3	2	3	4	5	6	6	5	-1	-13.3	12.7
Machinery and Equipment Manufacturing	4	3	6	5	5	2	4	4	0	-1.9	3.8
Other Manufacturing	0	1	1	1	1	1	0	0	0	-4.7	-11.9
Manufacturing	*32*	*41*	*65*	*69*	*74*	*47*	*54*	*60*	*6*	*11.1*	*3.8*
General Construction	13	13	47	51	49	42	50	44	-6	-11.8	13.3
Construction Trade Services	15	16	18	21	22	22	24	25	1	3.3	4.5
Construction	*28*	*29*	*66*	*72*	*71*	*64*	*74*	*69*	*-5*	*-6.9*	*9.1*
Basic Material Wholesaling	7	8	12	10	13	12	15	15	1	5.7	6.8
Machinery and Motor Vehicle Wholesaling	5	6	5	6	9	8	6	8	1	22.3	2.7
Personal and Household Good Wholesaling	3	6	8	8	11	13	13	14	0	1.3	9.0
Food Retailing	11	12	15	15	18	18	19	19	1	3.3	5.1
Personal and Household Good Retailing	13	11	13	15	15	17	18	18	0	-0.1	4.4
Motor Vehicle Retailing and Services	11	10	13	12	13	13	14	13	-1	-4.4	3.0
Accommodation, Cafes and Restaurants	9	11	13	15	16	19	19	18	-1	-3.8	5.7
Road Transport	9	13	17	18	18	16	21	24	3	14.0	6.4
Rail Transport	0	1	0	0	0	0	0	0	0	na	-100.0
Water Transport	0	0	0	0	0	0	0	0	0	na	na
Air and Space Transport	0	0	0	0	0	0	0	0	0	-7.5	0.3
Other Transport	0	0	0	0	0	0	0	0	0	-32.6	na
Services to Transport	2	2	1	1	3	3	5	3	-2	-35.9	6.4
Storage	0	0	0	0	0	0	0	0	0	2.0	-3.5
Retail and Distribution	*69*	*79*	*98*	*101*	*116*	*122*	*131*	*133*	*3*	*2.1*	*5.3*
Electricity and Gas Supply	43	80	31	35	41	39	35	33	-2	-6.0	-8.5
Water Supply, Sewerage and Drainage Services	0	0	1	0	0	0	0	0	0	-3.5	na
Communication Services	7	12	19	17	24	25	14	17	4	27.2	3.6
Finance	14	11	14	14	16	16	18	19	0	2.3	5.6
Insurance	1	3	1	1	1	1	2	2	1	49.1	-1.3
Services to Finance and Insurance	2	1	2	2	2	2	2	3	1	63.7	7.4
Property Services	72	70	92	83	90	96	93	107	15	15.9	4.3
Business Services	24	20	33	30	40	45	66	79	13	19.1	14.8
Business Services	*162*	*197*	*194*	*184*	*214*	*225*	*229*	*260*	*31*	*13.6*	*2.8*
Motion Picture, Radio and Television Services	2	1	3	3	2	1	1	1	0	-28.9	-3.5
Libraries, Museums and the Arts	0	1	1	1	1	1	1	1	0	-20.7	2.7
Sport and Recreation	3	3	4	4	5	6	6	6	0	1.0	9.1
Personal Services	3	3	3	4	6	5	5	6	1	23.8	5.5
Other Services	1	1	2	2	2	3	3	3	0	1.8	10.5
Private Households Employing Staff	0	0	0	0	0	0	0	0	0	na	na
Recreation Services	*8*	*9*	*12*	*14*	*16*	*15*	*17*	*17*	*1*	*3.6*	*6.3*
Government Administration	14	13	15	12	11	10	13	14	1	7.9	0.9
Defence	0	0	0	0	0	1	1	1	0	-3.1	na
Education	14	15	16	16	16	17	17	18	1	3.3	1.8
Health Services	19	19	24	24	21	21	22	26	4	20.7	3.2
Community Services	2	3	4	4	4	4	4	5	0	9.6	4.7
Social Services	*49*	*50*	*59*	*56*	*53*	*54*	*57*	*63*	*6*	*11.3*	*2.5*
TOTAL ALL INDUSTRIES	**449**	**530**	**644**	**642**	**695**	**709**	**745**	**790**	***45***	***6.0***	***4.1***
Incl. Tourism	13	15	18	19	21	21	23	23	*0*	*-0.5*	*4.3*

Table 14.7 Activity units in Central Otago District

Business units for Central Otago District	1994	1999	2004	2005	2006	2007	2008	2009	change 2008-09 Number	change 2008-09 %	Change 1999 to 2009
Agriculture	1,018	938	864	855	865	843	832	820	-12	-1.4	-1.3
Services to Agriculture; Hunting and Trapping	53	88	101	117	129	126	118	122	4	3.4	3.3
Forestry and Logging	32	24	36	37	31	31	30	25	-5	-16.7	0.4
Commercial Fishing	8	0	1	2	2	1	4	4	0	0.0	na
Coal Mining	1	1	0	0	0	0	0	0	0	na	-100.0
Oil and Gas Exploration	0	0	0	0	0	0	0	0	0	na	na
Metal Ore Mining	4	4	3	3	1	2	2	3	1	50.0	-2.8
Other Mining	1	2	3	3	4	4	3	3	0	0.0	4.1
Services to Mining	0	0	1	1	1	1	1	1	0	0.0	na
Primary	*1,117*	*1,057*	*1,009*	*1,018*	*1,033*	*1,008*	*990*	*978*	*-12*	*-1.2*	*-0.8*
Food, Beverage and Tobacco	2	12	23	24	28	32	33	33	0	0.0	10.6
Textile, Clothing, Footwear & Leather Mfg	2	2	2	2	4	4	4	5	1	25.0	9.6
Wood and Paper Product Manufacturing	7	15	15	19	18	15	18	16	-2	-11.1	0.6
Printing, Publishing and Recorded Media	1	6	3	2	2	2	2	3	1	50.0	-6.7
Petroleum, Coal, Chemical & Assoc Prod Mfg	0	2	4	4	4	3	3	3	0	0.0	4.1
Non-Metallic Mineral Product Manufacturing	2	8	8	8	10	10	14	13	-1	-7.1	5.0
Metal Product Manufacturing	4	7	11	11	15	17	16	15	-1	-6.3	7.9
Machinery and Equipment Manufacturing	7	15	29	28	26	23	24	28	4	16.7	6.4
Other Manufacturing	3	8	7	6	9	10	12	12	0	0.0	4.1
Manufacturing	*28*	*75*	*102*	*104*	*116*	*116*	*126*	*128*	*2*	*1.6*	*5.5*
General Construction	85	63	115	144	148	141	169	172	3	1.8	10.6
Construction Trade Services	72	100	140	153	172	184	204	200	-4	-2.0	7.2
Construction	*157*	*163*	*255*	*297*	*320*	*325*	*373*	*372*	*-1*	*-0.3*	*8.6*
Basic Material Wholesaling	22	29	35	28	34	40	39	38	-1	-2.6	2.7
Machinery and Motor Vehicle Wholesaling	9	18	23	27	25	22	22	23	1	4.5	2.5
Personal and Household Good Wholesaling	11	14	27	25	21	24	24	24	0	0.0	5.5
Food Retailing	52	45	51	54	54	52	48	51	3	6.3	1.3
Personal and Household Good Retailing	112	80	91	93	99	110	113	120	7	6.2	4.1
Motor Vehicle Retailing and Services	48	58	57	56	61	66	68	64	-4	-5.9	1.0
Accommodation, Cafes and Restaurants	47	88	118	119	125	126	127	139	12	9.4	4.7
Road Transport	20	31	37	37	42	37	38	42	4	10.5	3.1
Rail Transport	1	5	0	0	0	0	0	0	0	na	-100.0
Water Transport	0	0	2	2	2	2	1	1	0	0.0	na
Air and Space Transport	4	2	2	2	2	3	5	4	-1	-20.0	7.2
Other Transport	0	1	1	2	3	4	3	3	0	0.0	11.6
Services to Transport	8	5	10	14	13	14	15	15	0	0.0	11.6
Storage	0	2	3	4	5	7	7	7	0	0.0	13.3
Retail and Distribution	*334*	*378*	*457*	*463*	*486*	*507*	*510*	*531*	*21*	*4.1*	*3.5*
Electricity and Gas Supply	9	10	5	6	6	6	4	4	0	0.0	-8.8
Water Supply, Sewerage and Drainage Services	9	1	1	0	1	3	4	8	4	100.0	23.1
Communication Services	11	15	26	28	26	28	30	33	3	10.0	8.2
Finance	29	17	34	43	62	74	89	96	7	7.9	18.9
Insurance	2	2	3	3	3	2	2	2	0	0.0	0.0
Services to Finance and Insurance	7	6	14	18	19	23	25	22	-3	-12.0	13.9
Property Services	118	190	418	487	495	509	564	581	17	3.0	11.8
Business Services	58	93	136	143	166	171	193	195	2	1.0	7.7
Business Services	*243*	*334*	*637*	*728*	*778*	*816*	*911*	*941*	*30*	*3.3*	*10.9*
Motion Picture, Radio and Television Services	2	5	5	6	6	6	4	4	0	0.0	-2.2
Libraries, Museums and the Arts	7	10	16	17	19	19	21	20	-1	-4.8	7.2
Sport and Recreation	25	39	40	44	48	59	53	59	6	11.3	4.2
Personal Services	26	26	35	35	43	42	40	44	4	10.0	5.4
Other Services	29	37	42	45	41	41	42	45	3	7.1	2.0
Private Households Employing Staff	0	0	0	0	0	0	0	0	0	na	na
Recreation Services	*89*	*117*	*138*	*147*	*157*	*167*	*160*	*172*	*12*	*7.5*	*3.9*
Government Administration	27	14	16	10	10	10	12	12	0	0.0	-1.5
Defence	0	0	0	1	1	1	1	1	0	0.0	na
Education	38	41	36	38	38	37	39	40	1	2.6	-0.2
Health Services	39	45	66	62	61	63	68	67	-1	-1.5	4.1
Community Services	3	9	10	12	15	14	14	16	2	14.3	5.9
Social Services	*107*	*109*	*128*	*123*	*125*	*125*	*134*	*136*	*2*	*1.5*	*2.2*
TOTAL ALL INDUSTRIES	**2,075**	**2,233**	**2,726**	**2,880**	**3,015**	**3,064**	**3,204**	**3,258**	***54***	***1.7***	***3.8***
Incl. Tourism	73	93	116	119	126	131	133	140	*7*	*5.0*	*4.2*

Table 14.8 Summary indicators, Central Otago District

BERL Database of TLA ANZSIC Employment, GDP and Business Units	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Resident population																
Central Otago District	14,558	14,509	14,955	14,809	14,613	14,368	14,172	14,466	14,450	14,597	14,694	14,743	16,647	17,038	17,283	17,528
Otago Region	187,726	190,160	186,960	184,029	183,392	182,462	182,253	183,107	186,493	188,602	190,660	192,139	195,348	197,179	199,017	200,666
New Zealand	3,432,876	3,482,116	3,618,303	3,622,904	3,652,548	3,670,278	3,689,862	3,737,277	3,792,518	3,859,556	3,909,606	3,945,485	4,027,947	4,070,191	4,109,450	4,154,789
Real Value Added GDP (1996$m)																
Central Otago District	325	362	364	361	369	383	386	381	379	413	465	464	502	512	538	571
Otago Region	4,185	4,279	4,365	4,315	4,317	4,348	4,557	4,684	4,851	5,100	5,372	5,563	5,690	5,758	5,906	5,879
New Zealand	85,136	89,675	93,420	96,666	98,335	98,842	104,096	106,553	110,407	115,829	120,813	125,361	129,079	131,438	135,543	134,028
Real Value Added GDP (2009$m)																
Central Otago District	449	501	504	500	511	530	535	528	525	572	644	642	695	709	745	790
Otago Region	5,793	5,924	6,044	5,974	5,977	6,020	6,309	6,485	6,716	7,061	7,437	7,702	7,878	7,971	8,176	8,139
New Zealand	117,866	124,150	129,334	133,828	136,139	136,841	144,115	147,516	152,852	160,358	167,258	173,555	178,702	181,968	187,651	185,554
GDP per capita 1996$																
Central Otago District	22,301	24,931	24,349	24,392	25,259	26,629	27,255	26,354	26,247	28,306	31,642	31,439	30,167	30,049	31,153	32,566
Otago Region	22,291	22,502	23,350	23,449	23,540	23,830	25,003	25,580	26,011	27,042	28,175	28,954	29,129	29,199	29,675	29,297
New Zealand	24,800	25,753	25,819	26,682	26,922	26,930	28,211	28,511	29,112	30,011	30,902	31,773	32,046	32,293	32,983	32,259
GDP per capita 2009$																
Central Otago District	30,874	34,516	33,709	33,769	34,969	36,866	37,732	36,485	36,337	39,188	43,807	43,526	41,764	41,602	43,130	45,086
Otago Region	30,860	31,153	32,326	32,463	32,590	32,991	34,615	35,414	36,011	37,438	39,006	40,085	40,328	40,425	41,083	40,561
New Zealand	34,334	35,654	35,744	36,940	37,272	37,284	39,057	39,472	40,304	41,548	42,781	43,988	44,366	44,707	45,663	44,660
Employment (FTEs)																
Central Otago District	5,975	6,259	6,360	6,063	5,966	5,894	5,960	5,950	6,282	6,869	7,414	7,525	7,880	8,251	8,790	9,394
Otago Region	71,859	73,000	73,782	70,153	69,426	68,939	72,437	74,292	77,358	80,277	82,672	85,568	88,252	89,664	90,440	91,130
New Zealand	1,378,150	1,440,499	1,484,116	1,450,580	1,470,636	1,473,526	1,516,853	1,532,228	1,581,797	1,640,202	1,690,545	1,751,247	1,808,677	1,840,284	1,854,636	1,866,747
Productivity (GDP per FTE employed 1996$) #																
Central Otago District	49,196	52,524	52,199	54,486	56,706	59,542	59,761	59,194	55,904	55,836	58,299	57,344	59,382	57,840	57,162	56,611
Otago Region	52,723	53,269	53,947	56,258	56,991	57,852	58,011	58,246	58,063	58,972	60,404	60,528	60,083	59,853	60,938	60,104
New Zealand	55,929	56,573	57,393	60,948	61,282	61,527	63,284	64,246	64,630	65,551	66,434	66,644	66,501	66,574	68,200	66,891
Productivity (GDP per FTE employed 2009$) #																
Central Otago District	68,108	72,717	72,267	75,432	78,506	82,432	82,736	81,951	77,396	77,301	80,711	79,390	82,211	80,077	79,138	78,375
Otago Region	72,992	73,748	74,686	77,886	78,900	80,092	80,312	80,639	80,385	81,644	83,626	83,797	83,181	82,863	84,365	83,210
New Zealand	77,431	78,322	79,458	84,379	84,841	85,181	87,613	88,945	89,476	90,751	91,974	92,264	92,067	92,168	94,419	92,607
Business units (number)																
Central Otago District	2,075	2,220	2,186	2,180	2,233	2,233	2,228	2,287	2,415	2,509	2,726	2,880	3,015	3,064	3,204	3,258
Otago Region	16,838	17,819	17,867	17,606	18,192	18,258	18,930	19,253	19,982	20,835	22,456	23,651	24,716	25,403	26,092	26,367
New Zealand	314,311	345,019	350,091	354,106	376,513	379,701	406,567	403,645	408,416	422,548	453,662	474,007	490,474	500,728	511,030	512,580
Business size (FTEs per business unit)																
Central Otago District	2.9	2.8	2.9	2.8	2.7	2.6	2.7	2.6	2.6	2.7	2.7	2.6	2.6	2.7	2.7	2.9
Otago Region	4.3	4.1	4.1	4.0	3.8	3.8	3.8	3.9	3.9	3.9	3.7	3.6	3.6	3.5	3.5	3.5
New Zealand	4.4	4.2	4.2	4.1	3.9	3.9	3.7	3.8	3.9	3.9	3.7	3.7	3.7	3.7	3.6	3.6

 # excluded owner-occupied dwellings sector

14.3 Clutha District

Table 14.9 Employment in Clutha District

Employment for Clutha District	1994	1999	2004	2005	2006	2007	2008	2009	change 2008-09 Number	%	% change 1999 to 2009
Agriculture	2,319	2,182	2,400	2,283	2,570	2,675	2,658	2,570	-88	-3.3	1.7
Services to Agriculture; Hunting and Trapping	391	496	641	578	481	534	498	467	-31	-6.3	-0.6
Forestry and Logging	153	148	197	209	168	158	139	143	4	2.5	-0.4
Commercial Fishing	28	15	12	11	10	10	11	11	0	3.4	-2.9
Coal Mining	2	6	9	8	7	8	7	11	3	44.7	6.0
Oil and Gas Exploration	0	0	0	0	0	0	0	0	0	na	na
Metal Ore Mining	0	0	0	0	0	0	0	0	0	na	na
Other Mining	2	18	49	7	8	10	10	20	10	104.0	1.2
Services to Mining	0	0	0	0	0	0	0	0	0	na	na
Primary	*2,895*	*2,865*	*3,309*	*3,097*	*3,243*	*3,395*	*3,323*	*3,222*	*-101*	*-3.0*	*1.2*
Food, Beverage and Tobacco	1,055	1,018	1,085	1,056	1,073	1,108	1,086	1,152	66	6.1	1.2
Textile, Clothing, Footwear & Leather Mfg	156	130	83	81	71	59	44	41	-4	-8.3	-11.0
Wood and Paper Product Manufacturing	360	329	330	331	273	288	287	292	6	1.9	-1.2
Printing, Publishing and Recorded Media	8	47	89	83	78	77	79	75	-5	-6.0	4.7
Petroleum, Coal, Chemical & Assoc Prod Mfg	0	0	0	0	0	0	0	0	0	na	na
Non-Metallic Mineral Product Manufacturing	25	0	49	52	56	57	60	68	8	13.3	na
Metal Product Manufacturing	89	50	65	64	76	70	75	76	2	2.2	4.3
Machinery and Equipment Manufacturing	62	87	128	135	127	112	118	123	5	4.4	3.5
Other Manufacturing	6	9	15	9	9	0	0	0	0	na	-100.0
Manufacturing	*1,760*	*1,670*	*1,843*	*1,812*	*1,762*	*1,771*	*1,749*	*1,827*	*78*	*4.5*	*0.9*
General Construction	193	445	395	430	457	399	429	439	11	2.5	-0.1
Construction Trade Services	121	112	139	164	179	165	185	173	-12	-6.4	4.5
Construction	*314*	*557*	*534*	*593*	*635*	*564*	*614*	*613*	*-1*	*-0.2*	*1.0*
Basic Material Wholesaling	88	93	58	79	94	107	79	89	10	12.4	-0.5
Machinery and Motor Vehicle Wholesaling	17	20	35	27	40	36	27	24	-3	-11.8	1.6
Personal and Household Good Wholesaling	15	12	18	19	22	12	21	15	-6	-28.0	2.4
Food Retailing	189	228	247	233	250	283	281	326	44	15.7	3.6
Personal and Household Good Retailing	178	167	240	296	287	223	259	182	-76	-29.4	0.9
Motor Vehicle Retailing and Services	199	237	199	189	179	194	189	202	13	6.9	-1.6
Accommodation, Cafes and Restaurants	149	231	245	221	246	224	229	242	13	5.7	0.5
Road Transport	176	190	256	223	220	180	239	240	1	0.5	2.4
Rail Transport	0	0	3	3	2	0	3	3	0	2.9	na
Water Transport	0	3	0	0	0	0	0	0	0	na	-100.0
Air and Space Transport	2	3	3	3	2	2	2	2	0	4.2	-2.3
Other Transport	0	3	3	3	3	3	3	0	-3	-100.0	-100.0
Services to Transport	23	24	12	11	11	11	11	10	-1	-5.6	-8.0
Storage	0	0	0	0	0	3	0	0	0	na	na
Retail and Distribution	*1,035*	*1,211*	*1,318*	*1,306*	*1,356*	*1,279*	*1,343*	*1,336*	*-7*	*-0.5*	*1.0*
Electricity and Gas Supply	57	45	6	6	6	3	6	6	0	3.1	-18.6
Water Supply, Sewerage and Drainage Services	2	3	0	0	0	0	0	0	0	na	-100.0
Communication Services	22	18	23	20	28	35	35	35	1	2.0	7.0
Finance	82	38	33	31	32	33	36	43	7	20.1	1.2
Insurance	5	3	6	5	3	3	3	3	0	3.1	0.0
Services to Finance and Insurance	4	3	3	11	1	1	1	1	0	2.2	-15.7
Property Services	49	69	48	61	43	47	37	46	9	25.1	-4.0
Business Services	148	162	147	163	152	148	136	129	-6	-4.6	-2.2
Business Services	*369*	*341*	*265*	*297*	*264*	*269*	*252*	*263*	*11*	*4.4*	*-2.6*
Motion Picture, Radio and Television Services	0	0	0	3	0	0	3	3	0	1.1	na
Libraries, Museums and the Arts	11	12	17	19	18	21	12	15	4	30.2	2.5
Sport and Recreation	31	24	23	31	24	26	29	24	-5	-17.2	0.1
Personal Services	40	32	36	41	42	36	39	37	-3	-6.5	1.4
Other Services	69	37	43	51	59	62	63	82	19	29.5	8.2
Private Households Employing Staff	4	0	0	0	0	0	0	0	0	na	na
Recreation Services	*156*	*105*	*120*	*144*	*144*	*145*	*146*	*161*	*15*	*10.0*	*4.4*
Government Administration	159	100	109	92	66	26	36	42	6	18.0	-8.3
Defence	0	0	0	3	3	3	3	3	0	3.3	na
Education	415	350	392	382	352	413	424	463	39	9.3	2.8
Health Services	204	202	193	269	255	262	281	292	11	4.0	3.8
Community Services	23	77	95	97	87	66	78	84	6	7.6	0.9
Social Services	*801*	*729*	*789*	*843*	*764*	*770*	*821*	*885*	*63*	*7.7*	*2.0*
TOTAL ALL INDUSTRIES	**7,330**	**7,478**	**8,179**	**8,092**	**8,168**	**8,191**	**8,248**	**8,306**	***57***	***0.7***	***1.1***
Incl. Tourism	198	244	264	256	270	266	266	275	*9*	*3.3*	*1.2*

Table 14.10 Real GDP in Clutha District (2009$m)

Real GDP in 2009$m for Clutha District	1994	1999	2004	2005	2006	2007	2008	2009	change 2008-09 Number	change 2008-09 %	% Change 1999 to 2009
Agriculture	105	137	178	172	186	196	191	184	-7	-3.8	3.0
Services to Agriculture; Hunting and Trapping	18	23	22	20	19	20	18	15	-3	-16.1	-3.8
Forestry and Logging	28	30	42	47	46	50	46	45	-1	-3.0	4.1
Commercial Fishing	3	1	1	1	1	1	1	1	0	-5.0	-5.3
Coal Mining	0	2	2	1	2	2	2	2	0	11.1	3.7
Oil and Gas Exploration	0	0	0	0	0	0	0	0	0	na	na
Metal Ore Mining	0	0	0	0	0	0	0	0	0	na	na
Other Mining	0	4	9	1	2	2	2	5	3	108.5	2.5
Services to Mining	0	0	0	0	0	0	0	0	0	na	na
Primary	*155*	*197*	*254*	*242*	*255*	*270*	*262*	*253*	*-9*	*-3.4*	*2.5*
Food, Beverage and Tobacco	112	121	153	146	154	160	158	163	5	3.0	3.0
Textile, Clothing, Footwear & Leather Mfg	7	8	5	5	4	4	3	3	0	-12.3	-10.2
Wood and Paper Product Manufacturing	34	36	39	42	36	38	42	42	0	0.0	1.6
Printing, Publishing and Recorded Media	1	4	8	7	7	7	8	7	0	-5.6	6.1
Petroleum, Coal, Chemical & Assoc Prod Mfg	0	0	0	0	0	0	0	0	0	na	na
Non-Metallic Mineral Product Manufacturing	3	0	7	8	9	9	9	10	1	8.7	na
Metal Product Manufacturing	7	4	7	7	8	7	8	7	-1	-7.6	4.8
Machinery and Equipment Manufacturing	4	6	11	11	11	9	10	10	0	-0.3	4.7
Other Manufacturing	0	0	1	0	1	0	0	0	0	na	-100.0
Manufacturing	*167*	*181*	*230*	*227*	*229*	*235*	*238*	*242*	*4*	*1.7*	*3.0*
General Construction	11	27	29	30	31	25	27	27	0	-0.8	0.0
Construction Trade Services	7	6	8	9	10	9	10	9	-1	-10.5	4.5
Construction	*17*	*33*	*37*	*39*	*41*	*34*	*37*	*36*	*-1*	*-3.4*	*0.9*
Basic Material Wholesaling	8	10	7	9	10	11	8	9	1	10.5	-1.1
Machinery and Motor Vehicle Wholesaling	2	2	4	3	5	4	3	3	-1	-17.8	2.1
Personal and Household Good Wholesaling	2	1	2	2	3	1	3	2	-1	-30.4	3.1
Food Retailing	8	10	12	12	13	15	16	17	1	9.2	5.1
Personal and Household Good Retailing	7	8	12	16	15	12	14	10	-4	-31.5	2.6
Motor Vehicle Retailing and Services	9	11	11	11	10	12	12	13	1	8.2	2.3
Accommodation, Cafes and Restaurants	5	8	8	8	8	8	8	8	0	2.3	-0.3
Road Transport	12	14	20	18	19	15	21	21	0	-1.8	3.9
Rail Transport	0	0	1	1	1	0	1	1	0	-8.2	na
Water Transport	0	1	0	0	0	0	0	0	0	na	-100.0
Air and Space Transport	0	0	0	0	0	0	0	0	0	-7.5	-1.6
Other Transport	0	0	0	0	0	0	0	0	0	-100.0	-100.0
Services to Transport	3	3	2	2	2	2	2	2	0	-4.7	-7.1
Storage	0	0	0	0	0	0	0	0	0	na	na
Retail and Distribution	*55*	*70*	*80*	*82*	*86*	*81*	*89*	*86*	*-3*	*-3.3*	*2.1*
Electricity and Gas Supply	16	24	3	3	3	1	3	3	0	1.8	-19.0
Water Supply, Sewerage and Drainage Services	0	0	0	0	0	0	0	0	0	na	-100.0
Communication Services	3	4	8	7	11	15	15	16	1	9.9	15.4
Finance	13	8	9	9	9	9	11	13	3	24.3	4.6
Insurance	1	1	1	1	1	1	1	1	0	0.4	3.3
Services to Finance and Insurance	0	0	0	1	0	0	0	0	0	9.1	-15.5
Property Services	68	71	67	69	64	67	63	68	5	7.5	-0.5
Business Services	12	12	11	11	11	10	10	9	0	-3.1	-2.2
Business Services	*114*	*120*	*99*	*102*	*98*	*103*	*102*	*110*	*9*	*8.4*	*-0.9*
Motion Picture, Radio and Television Services	0	0	0	0	0	0	0	0	0	13.0	na
Libraries, Museums and the Arts	0	0	1	1	1	1	0	1	0	40.4	4.1
Sport and Recreation	2	2	2	2	2	2	2	2	0	-18.3	-0.9
Personal Services	1	2	2	2	2	2	2	2	0	-6.7	2.3
Other Services	1	1	1	2	2	2	2	2	0	20.1	6.6
Private Households Employing Staff	0	0	0	0	0	0	0	0	0	na	na
Recreation Services	*6*	*5*	*6*	*7*	*6*	*7*	*7*	*7*	*0*	*1.0*	*3.3*
Government Administration	17	12	14	13	9	4	5	5	1	11.1	-7.8
Defence	0	0	0	0	0	0	0	0	0	-3.1	na
Education	18	17	18	17	17	19	19	19	0	0.0	1.2
Health Services	13	16	14	20	19	20	22	22	0	1.1	3.5
Community Services	1	3	3	3	3	2	3	3	0	0.3	-0.8
Social Services	*48*	*48*	*49*	*53*	*48*	*45*	*49*	*49*	*1*	*1.6*	*0.4*
TOTAL ALL INDUSTRIES	**563**	**653**	**755**	**752**	**763**	**774**	**783**	**783**	***1***	***0.1***	***1.8***
Incl. Tourism	11	14	15	15	16	15	16	16	*0*	*0.7*	*1.3*

Table 14.11 Activity units in Clutha District

									change 2008-09		Change
Business units for Clutha District	1994	1999	2004	2005	2006	2007	2008	2009	Number	%	1999 to 2009
Agriculture	1,399	1,390	1,353	1,335	1,338	1,323	1,281	1,250	-31	-2.4	-1.1
Services to Agriculture; Hunting and Trapping	76	72	117	132	143	155	138	142	4	2.9	7.0
Forestry and Logging	45	125	173	178	169	177	181	174	-7	-3.9	3.4
Commercial Fishing	10	8	12	14	14	12	9	8	-1	-11.1	0.0
Coal Mining	1	1	1	1	1	1	1	1	0	0.0	0.0
Oil and Gas Exploration	0	0	0	0	0	0	0	0	0	na	na
Metal Ore Mining	3	0	0	0	0	0	0	0	0	na	na
Other Mining	1	2	3	3	3	4	4	3	-1	-25.0	4.1
Services to Mining	0	0	0	0	0	0	0	0	0	na	na
Primary	*1,535*	*1,598*	*1,659*	*1,663*	*1,668*	*1,672*	*1,614*	*1,578*	*-36*	*-2.2*	*-0.1*
Food, Beverage and Tobacco	17	5	9	9	8	6	6	6	0	0.0	1.8
Textile, Clothing, Footwear & Leather Mfg	11	6	8	8	5	4	2	3	1	50.0	-6.7
Wood and Paper Product Manufacturing	29	16	16	18	17	17	17	16	-1	-5.9	0.0
Printing, Publishing and Recorded Media	7	4	3	3	3	3	4	4	0	0.0	0.0
Petroleum, Coal, Chemical & Assoc Prod Mfg	4	0	0	0	0	0	0	0	0	na	na
Non-Metallic Mineral Product Manufacturing	11	0	4	4	4	4	4	5	1	25.0	na
Metal Product Manufacturing	13	7	7	10	12	9	11	10	-1	-9.1	3.6
Machinery and Equipment Manufacturing	39	18	22	20	19	18	16	14	-2	-12.5	-2.5
Other Manufacturing	11	4	6	4	3	2	2	2	0	0.0	-6.7
Manufacturing	*142*	*60*	*75*	*76*	*71*	*63*	*62*	*60*	*-2*	*-3.2*	*0.0*
General Construction	49	56	68	65	69	72	73	76	3	4.1	3.1
Construction Trade Services	41	57	66	67	75	78	79	78	-1	-1.3	3.2
Construction	*90*	*113*	*134*	*132*	*144*	*150*	*152*	*154*	*2*	*1.3*	*3.1*
Basic Material Wholesaling	21	34	25	27	27	31	32	31	-1	-3.1	-0.9
Machinery and Motor Vehicle Wholesaling	9	7	6	7	10	10	11	9	-2	-18.2	2.5
Personal and Household Good Wholesaling	11	8	11	9	8	13	15	13	-2	-13.3	5.0
Food Retailing	45	49	44	41	42	43	40	39	-1	-2.5	-2.3
Personal and Household Good Retailing	100	62	71	67	65	73	68	64	-4	-5.9	0.3
Motor Vehicle Retailing and Services	42	53	46	42	46	45	46	48	2	4.3	-1.0
Accommodation, Cafes and Restaurants	27	56	73	79	74	78	78	80	2	2.6	3.6
Road Transport	25	30	39	40	38	38	41	40	-1	-2.4	2.9
Rail Transport	2	2	1	1	1	1	1	1	0	0.0	-6.7
Water Transport	0	1	1	1	1	2	2	1	-1	-50.0	0.0
Air and Space Transport	5	1	1	1	1	1	1	1	0	0.0	0.0
Other Transport	0	1	2	2	2	1	1	0	-1	-100.0	-100.0
Services to Transport	10	4	4	5	5	6	5	5	0	0.0	2.3
Storage	0	0	0	0	1	1	0	0	0	na	na
Retail and Distribution	*297*	*308*	*324*	*322*	*321*	*343*	*341*	*332*	*-9*	*-2.6*	*0.8*
Electricity and Gas Supply	4	4	2	1	1	2	2	2	0	0.0	-6.7
Water Supply, Sewerage and Drainage Services	3	3	0	0	0	0	0	0	0	na	-100.0
Communication Services	8	12	13	16	13	11	15	13	-2	-13.3	0.8
Finance	21	22	27	37	49	57	61	63	2	3.3	11.1
Insurance	2	3	2	2	2	1	1	2	1	100.0	-4.0
Services to Finance and Insurance	5	3	4	4	4	4	4	4	0	0.0	2.9
Property Services	82	160	391	424	469	510	523	541	18	3.4	13.0
Business Services	39	53	63	60	59	68	68	69	1	1.5	2.7
Business Services	*164*	*260*	*502*	*544*	*597*	*653*	*674*	*694*	*20*	*3.0*	*10.3*
Motion Picture, Radio and Television Services	2	1	2	2	1	1	1	1	0	0.0	0.0
Libraries, Museums and the Arts	2	10	13	13	13	13	11	13	2	18.2	2.7
Sport and Recreation	13	30	31	30	32	35	37	36	-1	-2.7	1.8
Personal Services	21	20	20	25	26	30	27	32	5	18.5	4.8
Other Services	25	34	37	37	39	39	43	44	1	2.3	2.6
Private Households Employing Staff	0	0	0	0	0	0	0	0	0	na	na
Recreation Services	*63*	*95*	*103*	*107*	*111*	*118*	*119*	*126*	*7*	*5.9*	*2.9*
Government Administration	23	20	17	15	15	15	14	15	1	7.1	-2.8
Defence	0	0	0	1	1	1	1	1	0	0.0	na
Education	45	53	49	49	51	49	50	47	-3	-6.0	-1.2
Health Services	41	37	46	48	52	48	46	43	-3	-6.5	1.5
Community Services	3	11	12	11	10	8	9	11	2	22.2	0.0
Social Services	*112*	*121*	*124*	*124*	*129*	*121*	*120*	*117*	*-3*	*-2.5*	*-0.3*
TOTAL ALL INDUSTRIES	**2,403**	**2,555**	**2,921**	**2,968**	**3,041**	**3,120**	**3,082**	**3,061**	***-21***	***-0.7***	***1.8***
Incl. Tourism	62	74	86	89	88	93	91	91	*-1*	*-0.6*	*2.1*

Table 14.12 Summary indicators, Clutha District

BERL Database of TLA ANZSIC Employment, GDP and Business Units	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Resident population																
Clutha District	17,659	17,659	18,006	17,857	17,710	17,466	17,319	17,172	17,133	17,035	16,986	16,839	16,839	16,840	16,987	17,037
Otago Region	187,726	190,160	186,960	184,029	183,392	182,462	182,253	183,107	186,493	188,602	190,660	192,139	195,348	197,179	199,017	200,666
New Zealand	3,432,876	3,482,116	3,618,303	3,622,904	3,652,548	3,670,278	3,689,862	3,737,277	3,792,518	3,859,556	3,909,606	3,945,485	4,027,947	4,070,191	4,109,450	4,154,789
Real Value Added GDP (1996$m)																
Clutha District	406	456	464	468	480	472	504	477	523	525	546	543	551	559	565	566
Otago Region	4,185	4,279	4,365	4,315	4,317	4,348	4,557	4,684	4,851	5,100	5,372	5,563	5,690	5,758	5,906	5,879
New Zealand	85,136	89,675	93,420	96,666	98,335	98,842	104,096	106,553	110,407	115,829	120,813	125,361	129,079	131,438	135,543	134,028
Real Value Added GDP (2009$m)																
Clutha District	563	631	643	648	664	653	697	660	724	727	755	752	763	774	783	783
Otago Region	5,793	5,924	6,044	5,974	5,977	6,020	6,309	6,485	6,716	7,061	7,437	7,702	7,878	7,971	8,176	8,139
New Zealand	117,866	124,150	129,334	133,828	136,139	136,841	144,115	147,516	152,852	160,358	167,258	173,555	178,702	181,968	187,651	185,554
GDP per capita 1996$																
Clutha District	23,015	25,820	25,777	26,203	27,078	26,999	29,079	27,756	30,541	30,842	32,126	32,275	32,748	33,206	33,277	33,204
Otago Region	22,291	22,502	23,350	23,449	23,540	23,830	25,003	25,580	26,011	27,042	28,175	28,954	29,129	29,199	29,675	29,297
New Zealand	24,800	25,753	25,819	26,682	26,922	26,930	28,211	28,511	29,112	30,011	30,902	31,773	32,046	32,293	32,983	32,259
GDP per capita 2009$																
Clutha District	31,863	35,746	35,687	36,276	37,488	37,379	40,258	38,427	42,283	42,699	44,476	44,683	45,337	45,971	46,071	45,969
Otago Region	30,860	31,153	32,326	32,463	32,590	32,991	34,615	35,414	36,011	37,438	39,006	40,085	40,328	40,425	41,083	40,561
New Zealand	34,334	35,654	35,744	36,940	37,272	37,284	39,057	39,472	40,304	41,548	42,781	43,988	44,366	44,707	45,663	44,660
Employment (FTEs)																
Clutha District	7,330	7,688	7,899	7,597	7,438	7,478	7,663	7,651	8,283	8,293	8,179	8,092	8,168	8,191	8,248	8,306
Otago Region	71,859	73,000	73,782	70,153	69,426	68,939	72,437	74,292	77,358	80,277	82,672	85,568	88,252	89,664	90,440	91,130
New Zealand	1,378,150	1,440,499	1,484,116	1,450,580	1,470,636	1,473,526	1,516,853	1,532,228	1,581,797	1,640,202	1,690,545	1,751,247	1,808,677	1,840,284	1,854,636	1,866,747
Productivity (GDP per FTE employed 1996$) #																
Clutha District	50,203	53,899	53,577	56,331	59,091	57,843	60,609	57,554	58,496	58,807	62,025	62,526	62,909	63,630	63,953	63,455
Otago Region	52,723	53,269	53,947	56,258	56,991	57,852	58,011	58,246	58,063	58,972	60,404	60,528	60,083	59,853	60,938	60,104
New Zealand	55,929	56,573	57,393	60,948	61,282	61,527	63,284	64,246	64,630	65,551	66,434	66,644	66,501	66,574	68,200	66,891
Productivity (GDP per FTE employed 2009$) #																
Clutha District	69,503	74,620	74,175	77,987	81,808	80,080	83,910	79,679	80,985	81,415	85,869	86,564	87,094	88,092	88,539	87,850
Otago Region	72,992	73,748	74,686	77,886	78,900	80,092	80,312	80,639	80,385	81,644	83,626	83,797	83,181	82,863	84,365	83,210
New Zealand	77,431	78,322	79,458	84,379	84,841	85,181	87,613	88,945	89,476	90,751	91,974	92,264	92,067	92,168	94,419	92,607
Business units (number)																
Clutha District	2,403	2,533	2,493	2,504	2,587	2,555	2,651	2,757	2,823	2,866	2,921	2,968	3,041	3,120	3,082	3,061
Otago Region	16,838	17,819	17,867	17,606	18,192	18,258	18,930	19,253	19,982	20,835	22,456	23,651	24,716	25,403	26,092	26,367
New Zealand	314,311	345,019	350,091	354,106	376,513	379,701	406,567	403,645	408,416	422,548	453,662	474,007	490,474	500,728	511,030	512,580
Business size (FTEs per business unit)																
Clutha District	3.1	3.0	3.2	3.0	2.9	2.9	2.9	2.8	2.9	2.9	2.8	2.7	2.7	2.6	2.7	2.7
Otago Region	4.3	4.1	4.1	4.0	3.8	3.8	3.8	3.9	3.9	3.9	3.7	3.6	3.6	3.5	3.5	3.5
New Zealand	4.4	4.2	4.2	4.1	3.9	3.9	3.7	3.8	3.9	3.9	3.7	3.7	3.7	3.7	3.6	3.6

 # excluded owner-occupied dwellings sector

14.4 Dunedin City

Table 14.13 Employment in Dunedin City

Employment for Dunedin City	1994	1999	2004	2005	2006	2007	2008	2009	change 2008-09 Number	change 2008-09 %	% change 1999 to 2009
Agriculture	1,050	1,215	1,168	1,093	1,332	1,323	1,260	1,260	0	0.0	0.4
Services to Agriculture; Hunting and Trapping	86	149	229	253	251	188	243	265	22	9.2	5.9
Forestry and Logging	187	170	251	240	207	201	223	206	-17	-7.6	2.0
Commercial Fishing	106	84	97	89	71	75	75	82	7	9.3	-0.3
Coal Mining	0	3	0	0	0	0	0	0	0	na	-100.0
Oil and Gas Exploration	0	0	0	0	0	0	0	0	0	na	na
Metal Ore Mining	0	6	0	0	0	0	0	0	0	na	-100.0
Other Mining	37	41	47	45	38	34	32	30	-2	-6.8	-3.0
Services to Mining	0	0	3	3	2	55	74	77	3	4.3	na
Primary	*1,467*	*1,668*	*1,794*	*1,723*	*1,902*	*1,875*	*1,907*	*1,921*	*14*	*0.7*	*1.4*
Food, Beverage and Tobacco	3,213	1,767	2,305	2,188	1,965	1,961	1,738	1,627	-110	-6.4	-0.8
Textile, Clothing, Footwear & Leather Mfg	1,130	765	558	498	490	379	368	289	-79	-21.6	-9.3
Wood and Paper Product Manufacturing	293	279	378	476	471	496	454	433	-21	-4.5	4.5
Printing, Publishing and Recorded Media	766	764	841	1,026	904	874	797	682	-114	-14.4	-1.1
Petroleum, Coal, Chemical & Assoc Prod Mfg	233	261	316	304	199	160	172	202	31	17.9	-2.5
Non-Metallic Mineral Product Manufacturing	117	82	181	182	176	180	173	155	-18	-10.1	6.6
Metal Product Manufacturing	621	507	696	645	702	730	751	682	-69	-9.2	3.0
Machinery and Equipment Manufacturing	1,420	1,397	1,638	1,619	1,529	1,478	1,435	868	-568	-39.5	-4.7
Other Manufacturing	265	211	252	244	240	252	255	249	-5	-2.0	1.7
Manufacturing	*8,057*	*6,033*	*7,164*	*7,183*	*6,676*	*6,511*	*6,142*	*5,189*	*-953*	*-15.5*	*-1.5*
General Construction	1,352	813	1,262	1,391	1,396	1,437	1,595	1,513	-82	-5.2	6.4
Construction Trade Services	1,570	1,293	1,837	1,997	2,181	2,071	2,116	2,164	48	2.3	5.3
Construction	*2,922*	*2,106*	*3,099*	*3,388*	*3,577*	*3,508*	*3,711*	*3,676*	*-34*	*-0.9*	*5.7*
Basic Material Wholesaling	701	513	673	690	735	786	771	719	-51	-6.6	3.4
Machinery and Motor Vehicle Wholesaling	674	627	721	857	867	860	785	776	-8	-1.1	2.2
Personal and Household Good Wholesaling	894	790	907	901	928	992	934	1,008	74	7.9	2.5
Food Retailing	1,808	1,765	1,905	1,814	1,951	2,052	2,143	2,147	4	0.2	2.0
Personal and Household Good Retailing	2,317	2,132	2,582	2,483	2,736	2,594	2,516	2,517	1	0.0	1.7
Motor Vehicle Retailing and Services	1,256	1,253	1,376	1,282	1,314	1,298	1,244	1,232	-12	-0.9	-0.2
Accommodation, Cafes and Restaurants	1,898	2,000	2,538	2,560	2,819	2,735	2,259	2,229	-31	-1.4	1.1
Road Transport	1,015	863	928	949	902	899	853	798	-55	-6.4	-0.8
Rail Transport	137	100	40	34	33	28	32	33	1	2.9	-10.5
Water Transport	0	0	9	9	6	8	11	12	0	2.5	na
Air and Space Transport	45	36	52	46	59	58	56	70	14	24.7	6.9
Other Transport	0	0	3	5	8	12	12	4	-8	-65.6	na
Services to Transport	449	354	448	436	448	525	500	550	50	10.1	4.5
Storage	41	190	209	204	116	0	62	64	2	3.0	-10.3
Retail and Distribution	*11,236*	*10,623*	*12,391*	*12,269*	*12,920*	*12,847*	*12,179*	*12,160*	*-19*	*-0.2*	*1.4*
Electricity and Gas Supply	230	250	125	196	153	126	150	157	7	4.5	-4.6
Water Supply, Sewerage and Drainage Services	130	105	93	89	96	89	105	107	1	1.3	0.1
Communication Services	585	520	525	508	501	422	406	435	29	7.2	-1.8
Finance	903	569	485	470	507	601	598	603	5	0.8	0.6
Insurance	240	104	78	68	84	76	72	69	-2	-3.3	-4.0
Services to Finance and Insurance	243	265	360	366	390	429	464	463	-1	-0.2	5.7
Property Services	843	760	840	843	859	839	837	799	-39	-4.6	0.5
Business Services	2,688	3,360	4,102	4,425	4,942	5,408	6,303	5,955	-348	-5.5	5.9
Business Services	*5,863*	*5,933*	*6,608*	*6,966*	*7,534*	*7,989*	*8,936*	*8,588*	*-348*	*-3.9*	*3.8*
Motion Picture, Radio and Television Services	195	245	224	255	229	226	266	230	-36	-13.6	-0.6
Libraries, Museums and the Arts	301	358	408	542	585	583	605	480	-125	-20.6	3.0
Sport and Recreation	473	349	616	648	715	661	747	886	139	18.6	9.8
Personal Services	688	605	770	786	809	850	857	803	-54	-6.3	2.9
Other Services	878	795	1,008	1,015	1,128	1,193	1,173	1,298	125	10.7	5.0
Private Households Employing Staff	0	0	0	0	0	0	0	0	0	na	na
Recreation Services	*2,536*	*2,352*	*3,025*	*3,246*	*3,467*	*3,513*	*3,647*	*3,697*	*50*	*1.4*	*4.6*
Government Administration	1,787	1,390	1,208	1,187	1,280	1,338	1,342	1,405	64	4.7	0.1
Defence	79	200	147	145	152	130	120	105	-15	-12.9	-6.3
Education	5,239	5,310	5,675	6,093	6,129	6,413	6,387	6,553	166	2.6	2.1
Health Services	3,729	3,180	3,641	3,892	3,883	3,876	3,937	4,221	284	7.2	2.9
Community Services	936	1,780	1,874	2,219	2,190	2,124	2,242	2,458	216	9.6	3.3
Social Services	*11,770*	*11,860*	*12,545*	*13,536*	*13,634*	*13,882*	*14,027*	*14,742*	*714*	*5.1*	*2.2*
TOTAL ALL INDUSTRIES	**43,850**	**40,575**	**46,627**	**48,311**	**49,711**	**50,125**	**50,549**	**49,972**	***-576***	***-1.1***	***2.1***
Incl. Tourism	2,166	2,134	2,578	2,566	2,727	2,680	2,515	2,526	*11*	*0.4*	*1.7*

Table 14.14 Real GDP in Dunedin City (2009$m)

Real GDP in 2009$m for Dunedin City	1994	1999	2004	2005	2006	2007	2008	2009	change 2008-09 Number	%	% Change 1999 to 2009
Agriculture	48	76	86	82	97	97	91	90	0	-0.5	1.7
Services to Agriculture; Hunting and Trapping	4	7	8	9	10	7	9	9	0	-2.2	2.5
Forestry and Logging	35	35	53	54	56	63	74	65	-9	-12.6	6.5
Commercial Fishing	10	7	6	6	6	6	5	5	0	0.4	-2.8
Coal Mining	0	1	0	0	0	0	0	0	0	na	-100.0
Oil and Gas Exploration	0	0	0	0	0	0	0	0	0	na	na
Metal Ore Mining	0	2	0	0	0	0	0	0	0	na	-100.0
Other Mining	6	9	8	8	7	6	8	8	0	-4.8	-1.8
Services to Mining	0	0	0	0	0	2	3	3	0	-13.0	na
Primary	*103*	*136*	*163*	*159*	*176*	*181*	*190*	*179*	*-11*	*-5.7*	*2.8*
Food, Beverage and Tobacco	340	211	325	302	283	284	253	230	-23	-9.1	0.9
Textile, Clothing, Footwear & Leather Mfg	49	49	32	30	29	26	27	20	-7	-25.0	-8.5
Wood and Paper Product Manufacturing	28	30	45	60	61	66	66	62	-4	-6.3	7.4
Printing, Publishing and Recorded Media	65	67	73	91	79	81	79	68	-11	-13.9	0.2
Petroleum, Coal, Chemical & Assoc Prod Mfg	24	32	38	37	23	20	22	26	3	14.4	-2.3
Non-Metallic Mineral Product Manufacturing	14	10	28	27	28	28	27	23	-4	-13.7	8.6
Metal Product Manufacturing	48	44	75	66	72	73	76	62	-14	-17.9	3.5
Machinery and Equipment Manufacturing	91	103	136	138	129	121	123	71	-52	-42.3	-3.6
Other Manufacturing	11	11	14	13	14	14	15	13	-1	-8.7	2.3
Manufacturing	*669*	*557*	*765*	*766*	*717*	*712*	*688*	*576*	*-112*	*-16.3*	*0.3*
General Construction	76	50	92	97	94	91	102	93	-8	-8.2	6.5
Construction Trade Services	85	66	107	113	120	109	114	112	-3	-2.3	5.3
Construction	*161*	*116*	*198*	*209*	*214*	*200*	*216*	*205*	*-11*	*-5.1*	*5.9*
Basic Material Wholesaling	67	58	78	77	81	83	83	76	-7	-8.2	2.7
Machinery and Motor Vehicle Wholesaling	72	69	86	100	101	103	97	90	-8	-7.9	2.6
Personal and Household Good Wholesaling	91	87	109	105	110	119	114	119	5	4.4	3.2
Food Retailing	73	80	93	95	102	109	118	112	-6	-5.5	3.4
Personal and Household Good Retailing	93	97	131	133	145	139	139	135	-4	-2.9	3.4
Motor Vehicle Retailing and Services	54	56	74	74	76	79	81	81	0	0.2	3.7
Accommodation, Cafes and Restaurants	69	72	86	91	97	92	77	74	-4	-4.6	0.3
Road Transport	68	64	74	78	77	76	76	69	-6	-8.5	0.7
Rail Transport	20	19	14	11	10	9	10	9	-1	-8.2	-6.7
Water Transport	0	0	1	1	1	1	2	2	0	3.8	na
Air and Space Transport	5	5	8	7	9	10	10	11	1	10.7	7.6
Other Transport	0	0	0	0	0	0	0	0	0	-66.3	na
Services to Transport	55	51	67	68	70	80	78	87	9	11.1	5.5
Storage	6	18	16	14	7	0	4	4	0	-3.4	-14.2
Retail and Distribution	*674*	*675*	*838*	*855*	*886*	*899*	*889*	*868*	*-21*	*-2.4*	*2.5*
Electricity and Gas Supply	65	133	73	116	93	72	77	79	2	3.2	-5.0
Water Supply, Sewerage and Drainage Services	14	15	16	15	15	16	15	14	-1	-6.0	-0.2
Communication Services	91	112	178	183	190	182	173	200	27	15.6	6.0
Finance	144	125	133	131	134	163	177	184	8	4.3	4.0
Insurance	30	18	19	17	21	18	18	17	-1	-5.8	-0.8
Services to Finance and Insurance	23	28	34	37	39	41	47	50	3	6.5	6.1
Property Services	603	482	542	535	552	557	553	554	1	0.1	1.4
Business Services	216	241	294	303	346	374	448	430	-18	-4.0	6.0
Business Services	*1,186*	*1,153*	*1,287*	*1,338*	*1,390*	*1,423*	*1,508*	*1,529*	*21*	*1.4*	*2.9*
Motion Picture, Radio and Television Services	19	28	29	31	26	27	32	31	-1	-3.4	1.0
Libraries, Museums and the Arts	11	11	15	19	19	20	21	18	-3	-14.4	4.5
Sport and Recreation	35	26	48	47	50	46	50	59	9	17.0	8.7
Personal Services	25	33	44	44	45	50	51	48	-3	-6.5	3.8
Other Services	17	26	31	31	33	36	35	36	1	2.7	3.4
Private Households Employing Staff	0	0	0	0	0	0	0	0	0	na	na
Recreation Services	*107*	*124*	*167*	*173*	*173*	*180*	*190*	*192*	*2*	*1.1*	*4.5*
Government Administration	186	171	160	162	166	181	186	183	-3	-1.4	0.7
Defence	4	14	12	14	13	12	12	9	-2	-18.3	-3.5
Education	258	262	322	335	347	332	330	315	-15	-4.5	1.8
Health Services	231	247	270	288	293	295	306	319	13	4.2	2.6
Community Services	62	63	60	69	71	66	73	74	2	2.1	1.6
Social Services	*741*	*758*	*824*	*868*	*890*	*887*	*906*	*901*	*-5*	*-0.6*	*1.7*
TOTAL ALL INDUSTRIES	**3,641**	**3,519**	**4,241**	**4,368**	**4,446**	**4,481**	**4,586**	**4,449**	***-137***	***-3.0***	***2.4***
Incl. Tourism	127	129	159	161	166	165	162	164	*1*	*0.7*	*2.4*

Table 14.15 Activity units in Dunedin City

Business units for Dunedin City	1994	1999	2004	2005	2006	2007	2008	2009	change 2008-09 Number	%	Change 1999 to 2009
Agriculture	879	913	818	786	742	733	701	688	-13	-1.9	-2.8
Services to Agriculture; Hunting and Trapping	40	53	79	90	92	92	95	93	-2	-2.1	5.8
Forestry and Logging	81	130	184	176	158	156	168	161	-7	-4.2	2.2
Commercial Fishing	56	59	68	59	51	49	53	49	-4	-7.5	-1.8
Coal Mining	0	1	0	0	0	0	0	0	0	na	-100.0
Oil and Gas Exploration	0	0	0	0	0	0	0	0	0	na	na
Metal Ore Mining	1	2	3	1	1	1	2	2	0	0.0	0.0
Other Mining	6	7	5	6	9	6	7	6	-1	-14.3	-1.5
Services to Mining	0	0	1	1	1	5	5	4	-1	-20.0	na
Primary	*1,063*	*1,165*	*1,158*	*1,119*	*1,054*	*1,042*	*1,031*	*1,003*	*-28*	*-2.7*	*-1.5*
Food, Beverage and Tobacco	69	59	62	63	61	62	64	61	-3	-4.7	0.3
Textile, Clothing, Footwear & Leather Mfg	61	59	53	50	50	49	47	45	-2	-4.3	-2.7
Wood and Paper Product Manufacturing	45	45	52	52	55	52	52	52	0	0.0	1.5
Printing, Publishing and Recorded Media	42	42	42	44	47	53	42	40	-2	-4.8	-0.5
Petroleum, Coal, Chemical & Assoc Prod Mfg	27	25	29	29	24	25	24	24	0	0.0	-0.4
Non-Metallic Mineral Product Manufacturing	18	20	22	19	18	17	20	16	-4	-20.0	-2.2
Metal Product Manufacturing	81	80	100	101	104	95	96	87	-9	-9.4	0.8
Machinery and Equipment Manufacturing	122	125	128	129	137	136	143	147	4	2.8	1.6
Other Manufacturing	66	55	62	63	62	55	53	53	0	0.0	-0.4
Manufacturing	*531*	*510*	*550*	*550*	*558*	*544*	*541*	*525*	*-16*	*-3.0*	*0.3*
General Construction	242	227	266	310	358	390	411	409	-2	-0.5	6.1
Construction Trade Services	474	452	548	596	628	626	643	640	-3	-0.5	3.5
Construction	*716*	*679*	*814*	*906*	*986*	*1,016*	*1,054*	*1,049*	*-5*	*-0.5*	*4.4*
Basic Material Wholesaling	107	99	105	109	110	105	103	105	2	1.9	0.6
Machinery and Motor Vehicle Wholesaling	162	160	175	187	186	189	182	179	-3	-1.6	1.1
Personal and Household Good Wholesaling	187	193	161	154	161	163	169	171	2	1.2	-1.2
Food Retailing	318	294	275	272	272	269	268	262	-6	-2.2	-1.1
Personal and Household Good Retailing	599	576	594	601	597	601	611	619	8	1.3	0.7
Motor Vehicle Retailing and Services	289	290	279	292	290	281	288	281	-7	-2.4	-0.3
Accommodation, Cafes and Restaurants	298	327	422	451	448	446	440	450	10	2.3	3.2
Road Transport	247	246	250	264	264	264	260	252	-8	-3.1	0.2
Rail Transport	21	19	2	3	3	2	2	2	0	0.0	-20.2
Water Transport	0	2	4	6	4	6	5	3	-2	-40.0	4.1
Air and Space Transport	12	9	12	11	13	9	8	11	3	37.5	2.0
Other Transport	0	0	3	3	4	2	2	8	6	300.0	na
Services to Transport	58	57	56	58	65	67	64	62	-2	-3.1	0.8
Storage	12	15	14	16	16	14	10	11	1	10.0	-3.1
Retail and Distribution	*2,310*	*2,287*	*2,352*	*2,427*	*2,433*	*2,418*	*2,412*	*2,416*	*4*	*0.2*	*0.6*
Electricity and Gas Supply	9	9	6	6	5	5	6	6	0	0.0	-4.0
Water Supply, Sewerage and Drainage Services	11	3	3	3	3	4	5	5	0	0.0	5.2
Communication Services	70	127	111	112	106	108	112	118	6	5.4	-0.7
Finance	205	147	281	358	410	481	542	563	21	3.9	14.4
Insurance	137	68	31	32	34	29	29	29	0	0.0	-8.2
Services to Finance and Insurance	85	87	117	124	133	134	138	142	4	2.9	5.0
Property Services	929	1,110	1,615	1,722	1,871	1,973	2,026	2,104	78	3.8	6.6
Business Services	554	786	951	1,000	1,053	1,066	1,096	1,131	35	3.2	3.7
Business Services	*2,000*	*2,337*	*3,115*	*3,357*	*3,615*	*3,800*	*3,954*	*4,098*	*144*	*3.6*	*5.8*
Motion Picture, Radio and Television Services	35	38	40	50	52	52	51	50	-1	-2.0	2.8
Libraries, Museums and the Arts	62	81	78	85	96	101	118	104	-14	-11.9	2.5
Sport and Recreation	242	201	210	219	209	204	213	212	-1	-0.5	0.5
Personal Services	190	224	245	245	255	270	276	276	0	0.0	2.1
Other Services	132	189	216	229	227	222	224	225	1	0.4	1.8
Private Households Employing Staff	0	0	0	0	0	0	0	0	0	na	na
Recreation Services	*661*	*733*	*789*	*828*	*839*	*849*	*882*	*867*	*-15*	*-1.7*	*1.7*
Government Administration	110	80	74	67	65	66	67	65	-2	-3.0	-2.1
Defence	4	3	4	4	4	4	4	4	0	0.0	2.9
Education	211	231	234	243	241	240	248	250	2	0.8	0.8
Health Services	304	395	458	473	503	528	547	559	12	2.2	3.5
Community Services	43	143	140	142	139	139	142	149	7	4.9	0.4
Social Services	*672*	*852*	*910*	*929*	*952*	*977*	*1,008*	*1,027*	*19*	*1.9*	*1.9*
TOTAL ALL INDUSTRIES	**7,953**	**8,563**	**9,688**	**10,116**	**10,437**	**10,646**	**10,882**	**10,985**	***103***	***0.9***	***2.5***
Incl. Tourism	422	433	488	514	515	512	509	512	*3*	*0.6*	*1.7*

Table 14.16 Summary indicators, Dunedin City

BERL Database of TLA ANZSIC Employment, GDP and Business Units																
	1994	**1995**	**1996**	**1997**	**1998**	**1999**	**2000**	**2001**	**2002**	**2003**	**2004**	**2005**	**2006**	**2007**	**2008**	**2009**
Resident population																
Dunedin City	117,427	118,703	118,143	115,300	115,013	114,630	114,342	114,341	116,742	117,518	118,295	118,780	118,683	118,882	119,373	120,058
Otago Region	187,726	190,160	186,960	184,029	183,392	182,462	182,253	183,107	186,493	188,602	190,660	192,139	195,348	197,179	199,017	200,666
New Zealand	3,432,876	3,482,116	3,618,303	3,622,904	3,652,548	3,670,278	3,689,862	3,737,277	3,792,518	3,859,556	3,909,606	3,945,485	4,027,947	4,070,191	4,109,450	4,154,789
Real Value Added GDP (1996$m)																
Dunedin City	2,630	2,561	2,619	2,561	2,530	2,542	2,644	2,753	2,859	2,968	3,064	3,155	3,212	3,237	3,313	3,214
Otago Region	4,185	4,279	4,365	4,315	4,317	4,348	4,557	4,684	4,851	5,100	5,372	5,563	5,690	5,758	5,906	5,879
New Zealand	85,136	89,675	93,420	96,666	98,335	98,842	104,096	106,553	110,407	115,829	120,813	125,361	129,079	131,438	135,543	134,028
Real Value Added GDP (2009$m)																
Dunedin City	3,641	3,546	3,625	3,546	3,503	3,519	3,661	3,812	3,958	4,110	4,241	4,368	4,446	4,481	4,586	4,449
Otago Region	5,793	5,924	6,044	5,974	5,977	6,020	6,309	6,485	6,716	7,061	7,437	7,702	7,878	7,971	8,176	8,139
New Zealand	117,866	124,150	129,334	133,828	136,139	136,841	144,115	147,516	152,852	160,358	167,258	173,555	178,702	181,968	187,651	185,554
GDP per capita 1996$																
Dunedin City	22,397	21,576	22,166	22,212	21,997	22,175	23,127	24,080	24,492	25,259	25,897	26,561	27,060	27,228	27,751	26,768
Otago Region	22,291	22,502	23,350	23,449	23,540	23,830	25,003	25,580	26,011	27,042	28,175	28,954	29,129	29,199	29,675	29,297
New Zealand	24,800	25,753	25,819	26,682	26,922	26,930	28,211	28,511	29,112	30,011	30,902	31,773	32,046	32,293	32,983	32,259
GDP per capita 2009$																
Dunedin City	31,008	29,871	30,687	30,751	30,454	30,701	32,017	33,337	33,907	34,970	35,853	36,772	37,463	37,696	38,420	37,059
Otago Region	30,860	31,153	32,326	32,463	32,590	32,991	34,615	35,414	36,011	37,438	39,006	40,085	40,328	40,425	41,083	40,561
New Zealand	34,334	35,654	35,744	36,940	37,272	37,284	39,057	39,472	40,304	41,548	42,781	43,988	44,366	44,707	45,663	44,660
Employment (FTEs)																
Dunedin City	43,850	43,274	43,582	41,177	40,929	40,575	42,255	42,999	44,862	45,705	46,627	48,311	49,711	50,125	50,549	49,972
Otago Region	71,859	73,000	73,782	70,153	69,426	68,939	72,437	74,292	77,358	80,277	82,672	85,568	88,252	89,664	90,440	91,130
New Zealand	1,378,150	1,440,499	1,484,116	1,450,580	1,470,636	1,473,526	1,516,853	1,532,228	1,581,797	1,640,202	1,690,545	1,751,247	1,808,677	1,840,284	1,854,636	1,866,747
Productivity (GDP per FTE employed 1996$) #																
Dunedin City	54,303	53,785	54,787	56,883	56,652	57,463	57,708	59,157	59,014	60,287	61,078	60,798	60,200	60,194	61,157	59,916
Otago Region	52,723	53,269	53,947	56,258	56,991	57,852	58,011	58,246	58,063	58,972	60,404	60,528	60,083	59,853	60,938	60,104
New Zealand	55,929	56,573	57,393	60,948	61,282	61,527	63,284	64,246	64,630	65,551	66,434	66,644	66,501	66,574	68,200	66,891
Productivity (GDP per FTE employed 2009$) #																
Dunedin City	75,180	74,462	75,849	78,751	78,431	79,555	79,894	81,899	81,701	83,464	84,559	84,171	83,343	83,335	84,668	82,950
Otago Region	72,992	73,748	74,686	77,886	78,900	80,092	80,312	80,639	80,385	81,644	83,626	83,797	83,181	82,863	84,365	83,210
New Zealand	77,431	78,322	79,458	84,379	84,841	85,181	87,613	88,945	89,476	90,751	91,974	92,264	92,067	92,168	94,419	92,607
Business units (number)																
Dunedin City	7,953	8,321	8,506	8,180	8,504	8,563	8,807	8,760	8,884	9,055	9,688	10,116	10,437	10,646	10,882	10,985
Otago Region	16,838	17,819	17,867	17,606	18,192	18,258	18,930	19,253	19,982	20,835	22,456	23,651	24,716	25,403	26,092	26,367
New Zealand	314,311	345,019	350,091	354,106	376,513	379,701	406,567	403,645	408,416	422,548	453,662	474,007	490,474	500,728	511,030	512,580
Business size (FTEs per business unit)																
Dunedin City	5.5	5.2	5.1	5.0	4.8	4.7	4.8	4.9	5.0	5.0	4.8	4.8	4.8	4.7	4.6	4.5
Otago Region	4.3	4.1	4.1	4.0	3.8	3.8	3.8	3.9	3.9	3.9	3.7	3.6	3.6	3.5	3.5	3.5
New Zealand	4.4	4.2	4.2	4.1	3.9	3.9	3.7	3.8	3.9	3.9	3.7	3.7	3.7	3.7	3.6	3.6

 # excluded owner-occupied dwellings sector

14.5 Queenstown-Lakes District

Table 14.17 Employment in Queenstown-Lakes District

Employment for Queenstown-Lakes District	1994	1999	2004	2005	2006	2007	2008	2009	change 2008-09 Number	change 2008-09 %	% change 1999 to 2009
Agriculture	420	365	375	356	403	380	354	379	25	7.1	0.4
Services to Agriculture; Hunting and Trapping	35	28	137	173	174	126	66	60	-6	-9.3	7.9
Forestry and Logging	4	15	18	17	15	10	2	6	3	142.5	-8.9
Commercial Fishing	14	6	0	0	2	2	6	6	0	3.4	-0.5
Coal Mining	0	0	0	0	0	0	0	0	0	na	na
Oil and Gas Exploration	0	0	0	0	0	0	0	0	0	na	na
Metal Ore Mining	4	6	7	4	3	4	3	3	0	3.4	-5.3
Other Mining	0	9	28	26	25	0	3	6	3	103.8	-3.8
Services to Mining	9	6	0	3	0	0	0	3	3	na	-6.3
Primary	*486*	*435*	*565*	*579*	*623*	*523*	*434*	*464*	*29*	*6.7*	*0.6*
Food, Beverage and Tobacco	33	50	134	94	114	111	134	133	-1	-0.6	10.3
Textile, Clothing, Footwear & Leather Mfg	14	15	19	19	13	9	6	9	3	52.8	-4.5
Wood and Paper Product Manufacturing	52	48	62	71	71	75	56	55	-1	-1.7	1.4
Printing, Publishing and Recorded Media	43	45	78	88	104	120	112	181	69	61.4	14.9
Petroleum, Coal, Chemical & Assoc Prod Mfg	10	15	12	12	12	9	14	18	3	23.5	1.7
Non-Metallic Mineral Product Manufacturing	20	12	30	31	31	33	42	33	-10	-22.5	10.6
Metal Product Manufacturing	12	12	33	39	38	38	44	57	12	28.1	16.9
Machinery and Equipment Manufacturing	49	48	80	99	98	99	83	86	3	3.5	6.0
Other Manufacturing	8	35	31	39	44	44	50	38	-12	-23.2	1.0
Manufacturing	*240*	*280*	*479*	*491*	*526*	*538*	*543*	*611*	*68*	*12.5*	*8.1*
General Construction	335	295	683	814	868	856	866	831	-35	-4.1	10.9
Construction Trade Services	281	319	770	980	1,136	1,195	1,248	1,156	-92	-7.4	13.7
Construction	*617*	*614*	*1,453*	*1,794*	*2,005*	*2,052*	*2,114*	*1,987*	*-127*	*-6.0*	*12.5*
Basic Material Wholesaling	76	41	114	160	161	172	185	173	-12	-6.6	15.5
Machinery and Motor Vehicle Wholesaling	26	21	68	66	63	61	73	77	5	6.3	13.9
Personal and Household Good Wholesaling	32	78	145	177	163	89	133	177	44	33.0	8.5
Food Retailing	274	358	617	593	721	787	684	739	55	8.0	7.5
Personal and Household Good Retailing	629	612	894	915	1,011	1,037	1,100	1,127	26	2.4	6.3
Motor Vehicle Retailing and Services	149	160	275	247	244	243	256	251	-5	-2.0	4.6
Accommodation, Cafes and Restaurants	1,477	1,930	2,833	2,978	2,999	3,137	3,076	2,975	-101	-3.3	4.4
Road Transport	216	220	315	284	282	265	244	238	-6	-2.6	0.8
Rail Transport	0	0	6	6	6	0	0	0	0	na	na
Water Transport	89	100	128	139	166	126	98	132	33	33.8	2.8
Air and Space Transport	102	103	131	148	137	135	135	164	29	21.3	4.8
Other Transport	0	0	0	3	3	3	3	3	0	3.2	na
Services to Transport	169	208	306	367	369	354	327	308	-19	-5.8	4.0
Storage	0	0	3	3	6	6	6	6	0	3.0	na
Retail and Distribution	*3,239*	*3,831*	*5,835*	*6,085*	*6,328*	*6,415*	*6,320*	*6,369*	*49*	*0.8*	*5.2*
Electricity and Gas Supply	23	25	0	6	6	3	3	3	0	-1.6	-20.3
Water Supply, Sewerage and Drainage Services	17	12	6	12	9	5	6	6	0	3.1	-6.5
Communication Services	46	59	56	45	44	34	44	55	11	25.3	-0.7
Finance	96	76	166	163	218	269	293	310	17	5.7	15.1
Insurance	11	3	3	6	6	6	9	9	0	3.1	12.1
Services to Finance and Insurance	17	24	35	37	44	73	95	88	-8	-8.1	13.8
Property Services	230	304	373	450	479	503	478	496	18	3.8	5.0
Business Services	332	464	1,102	1,365	1,471	1,607	1,564	1,570	6	0.4	13.0
Business Services	*772*	*967*	*1,743*	*2,082*	*2,276*	*2,501*	*2,492*	*2,536*	*44*	*1.8*	*10.1*
Motion Picture, Radio and Television Services	53	54	106	111	122	122	105	37	-67	-64.4	-3.6
Libraries, Museums and the Arts	67	93	173	173	186	174	182	172	-10	-5.4	6.4
Sport and Recreation	350	355	819	805	859	854	746	747	1	0.1	7.7
Personal Services	140	141	282	317	347	390	331	386	55	16.5	10.6
Other Services	41	61	118	118	140	144	178	168	-9	-5.2	10.7
Private Households Employing Staff	5	0	0	0	0	0	0	0	0	na	na
Recreation Services	*656*	*704*	*1,498*	*1,524*	*1,653*	*1,685*	*1,542*	*1,511*	*-31*	*-2.0*	*7.9*
Government Administration	147	71	46	58	67	77	170	196	27	15.6	10.7
Defence	0	0	0	0	0	0	0	0	0	na	na
Education	197	215	334	342	370	353	416	472	56	13.4	8.2
Health Services	174	177	217	256	269	272	305	347	41	13.6	7.0
Community Services	19	41	88	64	64	73	74	80	6	8.0	6.9
Social Services	*537*	*504*	*685*	*719*	*769*	*775*	*965*	*1,094*	*129*	*13.4*	*8.1*
TOTAL ALL INDUSTRIES	**6,547**	**7,335**	**12,257**	**13,274**	**14,180**	**14,489**	**14,411**	**14,572**	***161***	***1.1***	***7.1***
Incl. Tourism	1,218	1,467	2,199	2,318	2,374	2,447	2,375	2,335	*-41*	*-1.7*	*4.8*

Table 14.18 Real GDP in Queenstown-Lakes District (2009$m)

Real GDP in 2009$m for Queenstown-Lakes District	1994	1999	2004	2005	2006	2007	2008	2009	change 2008-09 Number	change 2008-09 %	% Change 1999 to 2009
Agriculture	19	23	28	27	29	28	26	27	2	6.5	1.7
Services to Agriculture; Hunting and Trapping	2	1	5	6	7	5	2	2	0	-18.8	4.4
Forestry and Logging	1	3	4	4	4	3	1	2	1	129.4	-4.8
Commercial Fishing	1	0	0	0	0	0	0	0	0	-5.0	-3.0
Coal Mining	0	0	0	0	0	0	0	0	0	na	na
Oil and Gas Exploration	0	0	0	0	0	0	0	0	0	na	na
Metal Ore Mining	1	2	2	2	1	1	1	1	0	-20.4	-5.3
Other Mining	0	2	5	5	5	0	1	2	1	108.2	-2.6
Services to Mining	3	2	0	0	0	0	0	0	0	na	-23.3
Primary	*26*	*33*	*44*	*43*	*47*	*37*	*31*	*34*	*3*	*9.3*	*0.3*
Food, Beverage and Tobacco	3	6	19	13	16	16	19	19	-1	-3.5	12.2
Textile, Clothing, Footwear & Leather Mfg	1	1	1	1	1	1	0	1	0	46.1	-3.7
Wood and Paper Product Manufacturing	5	5	7	9	9	10	8	8	0	-3.5	4.2
Printing, Publishing and Recorded Media	4	4	7	8	9	11	11	18	7	62.2	16.4
Petroleum, Coal, Chemical & Assoc Prod Mfg	1	2	1	1	1	1	2	2	0	19.9	2.0
Non-Metallic Mineral Product Manufacturing	2	1	5	5	5	5	7	5	-2	-25.6	12.7
Metal Product Manufacturing	1	1	4	4	4	4	4	5	1	15.9	17.4
Machinery and Equipment Manufacturing	3	4	7	8	8	8	7	7	0	-1.1	7.1
Other Manufacturing	0	2	2	2	3	3	3	2	-1	-28.4	1.6
Manufacturing	*20*	*26*	*52*	*52*	*57*	*58*	*62*	*67*	*5*	*7.5*	*10.0*
General Construction	19	18	50	56	59	54	55	51	-4	-7.1	11.0
Construction Trade Services	15	16	45	55	63	63	68	60	-8	-11.5	13.8
Construction	*34*	*34*	*94*	*112*	*121*	*117*	*123*	*111*	*-12*	*-9.5*	*12.4*
Basic Material Wholesaling	7	5	13	18	18	18	20	18	-2	-8.2	14.7
Machinery and Motor Vehicle Wholesaling	3	2	8	8	7	7	9	9	0	-1.0	14.4
Personal and Household Good Wholesaling	3	9	17	21	19	11	16	21	5	28.7	9.3
Food Retailing	11	16	30	31	38	42	38	39	1	1.9	9.0
Personal and Household Good Retailing	25	28	46	49	53	55	61	60	0	-0.6	8.1
Motor Vehicle Retailing and Services	6	7	15	14	14	15	17	17	0	-0.8	8.7
Accommodation, Cafes and Restaurants	54	69	96	106	103	106	105	99	-7	-6.4	3.6
Road Transport	14	16	25	23	24	22	22	21	-1	-4.8	2.3
Rail Transport	0	0	2	2	2	0	0	0	0	na	na
Water Transport	12	19	20	23	25	21	17	24	6	35.4	2.0
Air and Space Transport	12	15	20	24	22	22	23	25	2	7.7	5.5
Other Transport	0	0	0	0	0	0	0	0	0	1.1	na
Services to Transport	21	30	45	58	57	54	51	49	-3	-4.9	5.0
Storage	0	0	0	0	0	0	0	0	0	-3.4	na
Retail and Distribution	*169*	*216*	*338*	*376*	*384*	*374*	*380*	*380*	*1*	*0.2*	*5.8*
Electricity and Gas Supply	6	13	0	3	3	1	1	1	0	-2.9	-20.7
Water Supply, Sewerage and Drainage Services	2	2	1	2	1	1	1	1	0	-4.4	-6.8
Communication Services	7	13	19	16	17	15	19	25	7	35.1	7.1
Finance	15	17	45	45	57	73	86	95	8	9.3	18.9
Insurance	1	1	1	1	1	1	2	2	0	0.4	15.8
Services to Finance and Insurance	2	2	3	4	4	7	10	9	0	-1.9	14.2
Property Services	118	125	179	200	218	232	222	240	18	8.2	6.7
Business Services	27	33	79	93	103	111	111	113	2	1.9	13.0
Business Services	*179*	*206*	*327*	*365*	*406*	*442*	*452*	*487*	*35*	*7.7*	*9.0*
Motion Picture, Radio and Television Services	5	6	14	14	14	15	13	5	-8	-60.2	-2.1
Libraries, Museums and the Arts	2	3	6	6	6	6	6	6	0	2.0	8.0
Sport and Recreation	26	26	63	58	60	60	50	50	-1	-1.2	6.7
Personal Services	5	8	16	18	19	23	20	23	3	16.3	11.6
Other Services	1	2	4	4	4	4	5	5	-1	-12.0	9.0
Private Households Employing Staff	0	0	0	0	0	0	0	0	0	na	na
Recreation Services	*39*	*45*	*103*	*100*	*103*	*108*	*94*	*89*	*-6*	*-5.9*	*7.1*
Government Administration	15	9	6	8	9	10	24	26	2	8.9	11.4
Defence	0	0	0	0	0	0	0	0	0	na	na
Education	11	11	19	18	19	20	22	23	1	5.5	7.3
Health Services	11	14	16	19	20	21	24	26	2	10.4	6.6
Community Services	1	1	3	2	2	2	2	2	0	0.6	5.1
Social Services	*38*	*35*	*44*	*47*	*50*	*53*	*72*	*77*	*6*	*8.1*	*8.1*
TOTAL ALL INDUSTRIES	**506**	**596**	**1,002**	**1,094**	**1,167**	**1,190**	**1,214**	**1,246**	***32***	***2.6***	***7.6***
Incl. Tourism	65	81	119	133	135	135	132	132	*-1*	*-0.4*	*5.0*

Table 14.19 Activity units in Queenstown-Lakes District

Business units for Queenstown-Lakes District	1994	1999	2004	2005	2006	2007	2008	2009	change 2008-09 Number	change 2008-09 %	Change 1999 to 2009
Agriculture	325	298	282	270	269	267	244	234	-10	-4.1	-2.4
Services to Agriculture; Hunting and Trapping	11	18	44	51	58	60	57	57	0	0.0	12.2
Forestry and Logging	8	17	20	20	26	26	25	22	-3	-12.0	2.6
Commercial Fishing	1	2	1	2	3	8	6	7	1	16.7	13.3
Coal Mining	1	0	0	0	0	0	0	0	0	na	na
Oil and Gas Exploration	0	0	0	0	0	0	0	0	0	na	na
Metal Ore Mining	2	5	2	3	3	1	1	1	0	0.0	-14.9
Other Mining	1	2	3	4	7	7	6	8	2	33.3	14.9
Services to Mining	0	2	1	1	1	1	1	3	2	200.0	4.1
Primary	*349*	*344*	*353*	*351*	*367*	*370*	*340*	*332*	*-8*	*-2.4*	*-0.4*
Food, Beverage and Tobacco	2	11	19	21	23	27	28	26	-2	-7.1	9.0
Textile, Clothing, Footwear & Leather Mfg	0	7	14	13	14	15	12	10	-2	-16.7	3.6
Wood and Paper Product Manufacturing	5	15	20	21	21	22	21	17	-4	-19.0	1.3
Printing, Publishing and Recorded Media	1	11	16	16	21	17	18	19	1	5.6	5.6
Petroleum, Coal, Chemical & Assoc Prod Mfg	0	4	4	4	5	5	5	6	1	20.0	4.1
Non-Metallic Mineral Product Manufacturing	2	6	10	11	15	16	13	12	-1	-7.7	7.2
Metal Product Manufacturing	2	7	7	12	14	17	16	16	0	0.0	8.6
Machinery and Equipment Manufacturing	6	20	31	34	36	35	34	37	3	8.8	6.3
Other Manufacturing	1	14	21	25	22	24	22	21	-1	-4.5	4.1
Manufacturing	*19*	*95*	*142*	*157*	*171*	*178*	*169*	*164*	*-5*	*-3.0*	*5.6*
General Construction	115	124	329	367	407	468	496	500	4	0.8	15.0
Construction Trade Services	99	127	348	425	476	475	525	544	19	3.6	15.7
Construction	*214*	*251*	*677*	*792*	*883*	*943*	*1,021*	*1,044*	*23*	*2.3*	*15.3*
Basic Material Wholesaling	22	10	24	27	31	31	33	36	3	9.1	13.7
Machinery and Motor Vehicle Wholesaling	12	12	20	22	20	18	23	25	2	8.7	7.6
Personal and Household Good Wholesaling	11	21	53	59	61	65	67	65	-2	-3.0	12.0
Food Retailing	67	59	69	80	76	87	85	88	3	3.5	4.1
Personal and Household Good Retailing	142	180	248	274	284	294	313	320	7	2.2	5.9
Motor Vehicle Retailing and Services	60	47	72	72	77	77	76	79	3	3.9	5.3
Accommodation, Cafes and Restaurants	222	268	402	413	439	441	451	457	6	1.3	5.5
Road Transport	66	57	96	96	100	94	94	86	-8	-8.5	4.2
Rail Transport	4	0	1	0	0	0	0	0	0	na	na
Water Transport	1	5	8	8	10	9	8	8	0	0.0	4.8
Air and Space Transport	13	26	33	32	34	39	38	34	-4	-10.5	2.7
Other Transport	0	0	2	1	1	1	2	3	1	50.0	na
Services to Transport	30	56	90	86	92	104	109	110	1	0.9	7.0
Storage	0	0	2	3	3	4	3	3	0	0.0	na
Retail and Distribution	*650*	*741*	*1,120*	*1,173*	*1,228*	*1,264*	*1,302*	*1,314*	*12*	*0.9*	*5.9*
Electricity and Gas Supply	2	3	1	2	2	2	3	3	0	0.0	0.0
Water Supply, Sewerage and Drainage Services	3	4	5	4	2	2	3	4	1	33.3	0.0
Communication Services	9	18	17	21	22	20	26	28	2	7.7	4.5
Finance	33	32	109	164	222	278	315	330	15	4.8	26.3
Insurance	3	4	3	2	2	2	2	2	0	0.0	-6.7
Services to Finance and Insurance	8	14	24	31	36	40	43	47	4	9.3	12.9
Property Services	209	431	979	1,120	1,249	1,380	1,502	1,526	24	1.6	13.5
Business Services	102	187	442	512	562	576	632	652	20	3.2	13.3
Business Services	*369*	*693*	*1,580*	*1,856*	*2,097*	*2,300*	*2,526*	*2,592*	*66*	*2.6*	*14.1*
Motion Picture, Radio and Television Services	14	24	67	69	67	73	76	73	-3	-3.9	11.8
Libraries, Museums and the Arts	35	41	58	68	69	61	68	68	0	0.0	5.2
Sport and Recreation	129	96	166	169	177	177	190	193	3	1.6	7.2
Personal Services	33	51	119	128	142	147	144	154	10	6.9	11.7
Other Services	29	21	36	41	44	45	53	51	-2	-3.8	9.3
Private Households Employing Staff	0	0	1	0	0	0	0	0	0	na	na
Recreation Services	*240*	*233*	*447*	*475*	*499*	*503*	*531*	*539*	*8*	*1.5*	*8.7*
Government Administration	29	8	10	8	9	9	12	13	1	8.3	5.0
Defence	0	0	0	0	0	0	0	0	0	na	na
Education	22	25	44	45	44	38	46	58	12	26.1	8.8
Health Services	23	55	101	106	111	114	112	117	5	4.5	7.8
Community Services	2	4	12	11	11	13	12	13	1	8.3	12.5
Social Services	*76*	*92*	*167*	*170*	*175*	*174*	*182*	*201*	*19*	*10.4*	*8.1*
TOTAL ALL INDUSTRIES	**1,917**	**2,449**	**4,486**	**4,974**	**5,420**	**5,732**	**6,071**	**6,186**	***115***	***1.9***	***9.7***
Incl. Tourism	205	257	399	411	434	441	454	457	*3*	*0.7*	*5.9*

Table 14.20 Summary indicators, Queenstown-Lakes District

BERL Database of TLA ANZSIC Employment, GDP and Business Units	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Resident population																
Queenstown-Lakes District	15,534	16,643	14,283	14,701	14,988	15,322	16,038	17,040	18,336	19,717	21,146	22,384	22,956	24,195	25,149	25,817
Otago Region	187,726	190,160	186,960	184,029	183,392	182,462	182,253	183,107	186,493	188,602	190,660	192,139	195,348	197,179	199,017	200,666
New Zealand	3,432,876	3,482,116	3,618,303	3,622,904	3,652,548	3,670,278	3,689,862	3,737,277	3,792,518	3,859,556	3,909,606	3,945,485	4,027,947	4,070,191	4,109,450	4,154,789
Real Value Added GDP (1996$m)																
Queenstown-Lakes District	365	411	419	415	413	431	502	543	578	653	724	790	843	859	877	900
Otago Region	4,185	4,279	4,365	4,315	4,317	4,348	4,557	4,684	4,851	5,100	5,372	5,563	5,690	5,758	5,906	5,879
New Zealand	85,136	89,675	93,420	96,666	98,335	98,842	104,096	106,553	110,407	115,829	120,813	125,361	129,079	131,438	135,543	134,028
Real Value Added GDP (2009$m)																
Queenstown-Lakes District	506	569	580	574	572	596	695	752	801	904	1,002	1,094	1,167	1,190	1,214	1,246
Otago Region	5,793	5,924	6,044	5,974	5,977	6,020	6,309	6,485	6,716	7,061	7,437	7,702	7,878	7,971	8,176	8,139
New Zealand	117,866	124,150	129,334	133,828	136,139	136,841	144,115	147,516	152,852	160,358	167,258	173,555	178,702	181,968	187,651	185,554
GDP per capita 1996$																
Queenstown-Lakes District	23,509	24,682	29,344	28,214	27,578	28,099	31,302	31,873	31,535	33,109	34,238	35,304	36,733	35,513	34,866	34,848
Otago Region	22,291	22,502	23,350	23,449	23,540	23,830	25,003	25,580	26,011	27,042	28,175	28,954	29,129	29,199	29,675	29,297
New Zealand	24,800	25,753	25,819	26,682	26,922	26,930	28,211	28,511	29,112	30,011	30,902	31,773	32,046	32,293	32,983	32,259
GDP per capita 2009$																
Queenstown-Lakes District	32,547	34,171	40,624	39,061	38,181	38,902	43,336	44,126	43,658	45,838	47,401	48,876	50,854	49,166	48,270	48,245
Otago Region	30,860	31,153	32,326	32,463	32,590	32,991	34,615	35,414	36,011	37,438	39,006	40,085	40,328	40,425	41,083	40,561
New Zealand	34,334	35,654	35,744	36,940	37,272	37,284	39,057	39,472	40,304	41,548	42,781	43,988	44,366	44,707	45,663	44,660
Employment (FTEs)																
Queenstown-Lakes District	6,547	7,427	7,462	7,162	7,107	7,335	8,799	9,544	9,936	11,229	12,257	13,274	14,180	14,489	14,411	14,572
Otago Region	71,859	73,000	73,782	70,153	69,426	68,939	72,437	74,292	77,358	80,277	82,672	85,568	88,252	89,664	90,440	91,130
New Zealand	1,378,150	1,440,499	1,484,116	1,450,580	1,470,636	1,473,526	1,516,853	1,532,228	1,581,797	1,640,202	1,690,545	1,751,247	1,808,677	1,840,284	1,854,636	1,866,747
Productivity (GDP per FTE employed 1996$) #																
Queenstown-Lakes District	50,501	50,261	51,214	52,970	53,300	53,841	52,613	52,573	53,887	53,967	54,911	55,425	55,411	55,279	56,782	57,522
Otago Region	52,723	53,269	53,947	56,258	56,991	57,852	58,011	58,246	58,063	58,972	60,404	60,528	60,083	59,853	60,938	60,104
New Zealand	55,929	56,573	57,393	60,948	61,282	61,527	63,284	64,246	64,630	65,551	66,434	66,644	66,501	66,574	68,200	66,891
Productivity (GDP per FTE employed 2009$) #																
Queenstown-Lakes District	69,915	69,583	70,903	73,334	73,791	74,540	72,839	72,784	74,604	74,714	76,021	76,733	76,714	76,530	78,611	79,636
Otago Region	72,992	73,748	74,686	77,886	78,900	80,092	80,312	80,639	80,385	81,644	83,626	83,797	83,181	82,863	84,365	83,210
New Zealand	77,431	78,322	79,458	84,379	84,841	85,181	87,613	88,945	89,476	90,751	91,974	92,264	92,067	92,168	94,419	92,607
Business units (number)																
Queenstown-Lakes District	1,917	2,233	2,225	2,208	2,355	2,449	2,818	2,993	3,386	3,862	4,486	4,974	5,420	5,732	6,071	6,186
Otago Region	16,838	17,819	17,867	17,606	18,192	18,258	18,930	19,253	19,982	20,835	22,456	23,651	24,716	25,403	26,092	26,367
New Zealand	314,311	345,019	350,091	354,106	376,513	379,701	406,567	403,645	408,416	422,548	453,662	474,007	490,474	500,728	511,030	512,580
Business size (FTEs per business unit)																
Queenstown-Lakes District	3.4	3.3	3.4	3.2	3.0	3.0	3.1	3.2	2.9	2.9	2.7	2.7	2.6	2.5	2.4	2.4
Otago Region	4.3	4.1	4.1	4.0	3.8	3.8	3.8	3.9	3.9	3.9	3.7	3.6	3.6	3.5	3.5	3.5
New Zealand	4.4	4.2	4.2	4.1	3.9	3.9	3.7	3.8	3.9	3.9	3.7	3.7	3.7	3.7	3.6	3.6

 # excluded owner-occupied dwellings sector

14.6 Waitaki District

Table 14.21 Employment in Waitaki District

Employment for Waitaki District	1994	1999	2004	2005	2006	2007	2008	2009	change 2008-09 Number	change 2008-09 %	% change 1999 to 2009
Agriculture	1,689	1,430	1,404	1,318	1,512	1,491	1,558	1,546	-12	-0.8	0.8
Services to Agriculture; Hunting and Trapping	68	85	139	170	160	172	137	178	41	29.5	7.7
Forestry and Logging	31	39	42	68	31	26	25	25	1	2.5	-4.2
Commercial Fishing	38	30	33	31	27	29	29	37	7	24.4	2.0
Coal Mining	0	0	0	0	0	0	0	0	0	na	na
Oil and Gas Exploration	0	0	0	0	0	0	0	0	0	na	na
Metal Ore Mining	0	240	101	128	83	132	145	181	36	24.7	-2.8
Other Mining	79	65	40	47	50	51	30	17	-13	-43.4	-12.6
Services to Mining	0	0	0	0	0	0	0	0	0	na	na
Primary	*1,905*	*1,889*	*1,760*	*1,762*	*1,864*	*1,900*	*1,924*	*1,984*	*60*	*3.1*	*0.5*
Food, Beverage and Tobacco	1,307	1,071	1,303	1,393	1,205	1,247	1,257	1,334	77	6.1	2.2
Textile, Clothing, Footwear & Leather Mfg	356	288	489	308	294	275	320	302	-19	-5.8	0.5
Wood and Paper Product Manufacturing	108	81	79	78	81	80	76	73	-3	-3.5	-1.0
Printing, Publishing and Recorded Media	79	43	53	87	78	61	55	60	5	9.9	3.4
Petroleum, Coal, Chemical & Assoc Prod Mfg	3	3	9	12	15	14	20	33	13	64.0	26.9
Non-Metallic Mineral Product Manufacturing	31	27	32	29	26	29	15	31	16	106.5	1.3
Metal Product Manufacturing	123	109	92	105	90	113	109	122	14	12.4	1.2
Machinery and Equipment Manufacturing	80	82	101	97	69	35	74	80	6	8.0	-0.2
Other Manufacturing	49	46	40	45	39	44	42	25	-17	-41.1	-5.9
Manufacturing	*2,136*	*1,750*	*2,200*	*2,155*	*1,897*	*1,899*	*1,968*	*2,060*	*92*	*4.6*	*1.6*
General Construction	247	256	289	312	369	395	380	384	5	1.2	4.1
Construction Trade Services	220	211	240	278	296	301	328	334	6	1.9	4.7
Construction	*467*	*467*	*528*	*590*	*665*	*696*	*707*	*718*	*11*	*1.5*	*4.4*
Basic Material Wholesaling	108	102	108	131	138	156	151	163	12	8.0	4.8
Machinery and Motor Vehicle Wholesaling	57	27	51	56	66	55	57	44	-13	-23.1	4.9
Personal and Household Good Wholesaling	55	63	48	56	59	49	61	84	22	36.6	2.9
Food Retailing	355	300	214	303	312	313	347	366	19	5.4	2.0
Personal and Household Good Retailing	422	344	364	375	367	395	376	366	-10	-2.7	0.6
Motor Vehicle Retailing and Services	229	204	241	230	246	250	262	284	22	8.2	3.4
Accommodation, Cafes and Restaurants	406	398	505	447	457	515	407	445	38	9.3	1.1
Road Transport	126	179	185	169	188	196	187	171	-16	-8.7	-0.5
Rail Transport	7	3	3	3	3	3	3	3	0	2.9	0.6
Water Transport	0	0	0	0	0	0	0	0	0	na	na
Air and Space Transport	2	6	0	3	0	0	6	10	3	54.3	4.9
Other Transport	0	0	0	0	0	0	0	0	0	na	na
Services to Transport	8	12	9	9	14	14	17	17	0	0.6	3.4
Storage	1	0	0	0	0	0	0	0	0	na	na
Retail and Distribution	*1,774*	*1,638*	*1,727*	*1,782*	*1,850*	*1,947*	*1,874*	*1,950*	*76*	*4.1*	*1.8*
Electricity and Gas Supply	64	58	0	8	8	8	8	8	0	0.0	-17.7
Water Supply, Sewerage and Drainage Services	0	0	3	3	3	2	3	3	0	3.1	na
Communication Services	73	47	39	32	37	31	30	36	6	18.8	-2.7
Finance	132	77	56	56	48	54	54	49	-6	-10.3	-4.5
Insurance	18	9	6	6	6	6	9	13	3	36.4	3.5
Services to Finance and Insurance	16	9	18	28	26	30	27	24	-3	-11.3	10.4
Property Services	57	78	176	183	156	139	132	165	33	24.6	7.8
Business Services	201	220	352	385	381	385	341	369	28	8.1	5.3
Business Services	*561*	*498*	*650*	*700*	*666*	*657*	*606*	*666*	*61*	*10.0*	*3.0*
Motion Picture, Radio and Television Services	22	12	20	18	21	28	26	21	-5	-18.6	6.0
Libraries, Museums and the Arts	19	24	27	30	33	34	37	40	4	9.6	5.3
Sport and Recreation	26	33	52	66	76	51	48	56	8	17.0	5.4
Personal Services	70	99	79	71	78	78	83	80	-3	-3.6	-2.1
Other Services	72	68	72	80	92	108	101	97	-4	-4.4	3.6
Private Households Employing Staff	10	0	0	0	0	0	0	0	0	na	na
Recreation Services	*219*	*236*	*250*	*266*	*302*	*298*	*295*	*294*	*-1*	*-0.2*	*2.2*
Government Administration	245	113	107	104	118	126	112	126	14	12.7	1.1
Defence	0	0	0	3	3	3	3	3	0	3.3	na
Education	511	455	400	416	330	458	376	469	93	24.6	0.3
Health Services	237	282	291	349	366	340	359	384	25	7.0	3.1
Community Services	102	329	282	241	252	284	218	231	14	6.3	-3.5
Social Services	*1,095*	*1,179*	*1,081*	*1,112*	*1,069*	*1,212*	*1,067*	*1,213*	*146*	*13.7*	*0.3*
TOTAL ALL INDUSTRIES	**8,157**	**7,657**	**8,195**	**8,365**	**8,312**	**8,608**	**8,442**	**8,886**	***444***	***5.3***	***1.5***
Incl. Tourism	376	363	415	398	411	440	392	419	*27*	*6.8*	*1.4*

Table 14.22 Real GDP in Waitaki District (2009$m)

Real GDP in 2009$m for Waitaki District	1994	1999	2004	2005	2006	2007	2008	2009	change 2008-09 Number	change 2008-09 %	% Change 1999 to 2009
Agriculture	77	90	104	99	110	109	112	111	-1	-1.3	2.1
Services to Agriculture; Hunting and Trapping	3	4	5	6	7	6	5	6	1	16.0	4.2
Forestry and Logging	6	8	9	15	8	8	8	8	0	-3.0	0.1
Commercial Fishing	4	2	2	2	2	2	2	2	0	14.3	-0.5
Coal Mining	0	0	0	0	0	0	0	0	0	na	na
Oil and Gas Exploration	0	0	0	0	0	0	0	0	0	na	na
Metal Ore Mining	0	71	36	58	33	35	56	54	-2	-4.0	-2.7
Other Mining	14	15	7	8	10	9	7	4	-3	-42.1	-11.5
Services to Mining	0	0	0	0	0	0	0	0	0	na	na
Primary	*103*	*190*	*163*	*189*	*169*	*170*	*191*	*185*	*-6*	*-3.1*	*-0.3*
Food, Beverage and Tobacco	138	128	184	192	173	181	183	189	6	3.0	4.0
Textile, Clothing, Footwear & Leather Mfg	15	18	28	19	18	19	23	21	-2	-9.9	1.3
Wood and Paper Product Manufacturing	10	9	9	10	11	11	11	10	-1	-5.3	1.7
Printing, Publishing and Recorded Media	7	4	5	8	7	6	5	6	1	10.5	4.7
Petroleum, Coal, Chemical & Assoc Prod Mfg	0	0	1	1	2	2	3	4	2	59.1	27.3
Non-Metallic Mineral Product Manufacturing	4	3	5	4	4	5	2	5	2	98.3	3.2
Metal Product Manufacturing	9	10	10	11	9	11	11	11	0	1.7	1.6
Machinery and Equipment Manufacturing	5	6	8	8	6	3	6	7	0	3.2	0.9
Other Manufacturing	2	2	2	2	2	3	2	1	-1	-45.1	-5.3
Manufacturing	*191*	*180*	*252*	*256*	*231*	*238*	*247*	*254*	*6*	*2.6*	*3.5*
General Construction	14	16	21	22	25	25	24	24	0	-2.0	4.3
Construction Trade Services	12	11	14	16	16	16	18	17	0	-2.6	4.7
Construction	*26*	*26*	*35*	*37*	*41*	*41*	*42*	*41*	*-1*	*-2.3*	*4.5*
Basic Material Wholesaling	10	11	13	15	15	16	16	17	1	6.1	4.1
Machinery and Motor Vehicle Wholesaling	6	3	6	7	8	7	7	5	-2	-28.4	5.4
Personal and Household Good Wholesaling	6	7	6	7	7	6	7	10	2	32.2	3.6
Food Retailing	14	14	10	16	16	17	19	19	0	-0.5	3.4
Personal and Household Good Retailing	17	16	19	20	19	21	21	20	-1	-5.6	2.3
Motor Vehicle Retailing and Services	10	9	13	13	14	15	17	19	2	9.5	7.4
Accommodation, Cafes and Restaurants	15	14	17	16	16	17	14	15	1	5.7	0.3
Road Transport	8	13	15	14	16	17	17	15	-2	-10.8	1.0
Rail Transport	1	1	1	1	1	1	1	1	0	-8.2	4.8
Water Transport	0	0	0	0	0	0	0	0	0	na	na
Air and Space Transport	0	1	0	1	0	0	1	1	0	37.0	5.6
Other Transport	0	0	0	0	0	0	0	0	0	na	na
Services to Transport	1	2	1	1	2	2	3	3	0	1.5	4.5
Storage	0	0	0	0	0	0	0	0	0	na	na
Retail and Distribution	*89*	*91*	*101*	*110*	*115*	*119*	*123*	*124*	*1*	*0.9*	*3.2*
Electricity and Gas Supply	18	31	0	5	5	5	4	4	0	-1.3	-18.1
Water Supply, Sewerage and Drainage Services	0	0	1	0	0	0	0	0	0	-4.4	na
Communication Services	11	10	13	11	14	13	13	17	4	28.1	5.0
Finance	21	17	15	16	13	15	16	15	-1	-7.2	-1.3
Insurance	2	2	1	1	2	1	2	3	1	32.8	6.9
Services to Finance and Insurance	2	1	2	3	3	3	3	3	0	-5.4	10.7
Property Services	78	79	107	109	100	97	96	111	15	16.1	3.4
Business Services	16	16	25	26	27	27	24	27	2	9.8	5.4
Business Services	*148*	*155*	*164*	*172*	*163*	*162*	*159*	*179*	*21*	*13.1*	*1.4*
Motion Picture, Radio and Television Services	2	1	3	2	2	3	3	3	0	-9.0	7.7
Libraries, Museums and the Arts	1	1	1	1	1	1	1	1	0	18.2	6.9
Sport and Recreation	2	2	4	5	5	4	3	4	0	15.4	4.3
Personal Services	3	5	4	4	4	5	5	5	0	-3.8	-1.1
Other Services	1	2	2	2	3	3	3	3	0	-11.3	2.0
Private Households Employing Staff	0	0	0	0	0	0	0	0	0	na	na
Recreation Services	*9*	*12*	*14*	*15*	*16*	*16*	*16*	*16*	*0*	*-0.6*	*2.5*
Government Administration	25	14	14	14	15	17	15	16	1	6.1	1.7
Defence	0	0	0	0	0	0	0	0	0	-3.1	na
Education	22	19	20	20	19	20	20	19	0	-1.6	0.0
Health Services	15	22	22	26	28	26	28	29	1	4.0	2.8
Community Services	7	12	9	7	8	9	7	7	0	-1.0	-5.1
Social Services	*69*	*67*	*65*	*68*	*70*	*72*	*70*	*72*	*2*	*2.4*	*0.7*
TOTAL ALL INDUSTRIES	**634**	**722**	**794**	**846**	**806**	**817**	**848**	**871**	***23***	***2.7***	***1.9***
Incl. Tourism	18	19	22	23	23	23	24	24	*0*	*0.3*	*2.1*

Table 14.23 Activity units in Waitaki District

Business units for Waitaki District	1994	1999	2004	2005	2006	2007	2008	2009	change 2008-09 Number	change 2008-09 %	Change 1999 to 2009
Agriculture	1,335	1,116	925	920	943	901	867	843	-24	-2.8	-2.8
Services to Agriculture; Hunting and Trapping	44	34	74	77	80	98	103	101	-2	-1.9	11.5
Forestry and Logging	24	62	73	68	58	58	57	57	0	0.0	-0.8
Commercial Fishing	14	23	24	20	20	19	15	14	-1	-6.7	-4.8
Coal Mining	0	0	0	0	0	0	0	0	0	na	na
Oil and Gas Exploration	0	0	0	0	0	0	0	0	0	na	na
Metal Ore Mining	2	5	1	1	2	3	4	3	-1	-25.0	-5.0
Other Mining	12	6	6	6	7	6	5	4	-1	-20.0	-4.0
Services to Mining	0	0	1	2	1	1	1	0	-1	-100.0	na
Primary	*1,431*	*1,246*	*1,104*	*1,094*	*1,111*	*1,086*	*1,052*	*1,022*	*-30*	*-2.9*	*-2.0*
Food, Beverage and Tobacco	18	16	14	11	10	8	10	11	1	10.0	-3.7
Textile, Clothing, Footwear & Leather Mfg	14	7	9	9	7	8	6	5	-1	-16.7	-3.3
Wood and Paper Product Manufacturing	15	12	13	18	16	15	14	16	2	14.3	2.9
Printing, Publishing and Recorded Media	5	5	5	5	4	5	4	5	1	25.0	0.0
Petroleum, Coal, Chemical & Assoc Prod Mfg	1	2	2	3	3	5	5	5	0	0.0	9.6
Non-Metallic Mineral Product Manufacturing	6	10	8	8	8	9	8	7	-1	-12.5	-3.5
Metal Product Manufacturing	9	15	11	12	10	15	16	15	-1	-6.3	0.0
Machinery and Equipment Manufacturing	28	14	16	15	16	20	19	20	1	5.3	3.6
Other Manufacturing	8	7	8	12	12	10	11	11	0	0.0	4.6
Manufacturing	*104*	*88*	*86*	*93*	*86*	*95*	*93*	*95*	*2*	*2.2*	*0.8*
General Construction	55	54	69	81	92	93	96	96	0	0.0	5.9
Construction Trade Services	78	83	91	105	119	133	144	141	-3	-2.1	5.4
Construction	*133*	*137*	*160*	*186*	*211*	*226*	*240*	*237*	*-3*	*-1.3*	*5.6*
Basic Material Wholesaling	24	22	36	37	38	35	39	41	2	5.1	6.4
Machinery and Motor Vehicle Wholesaling	14	9	11	16	15	15	15	12	-3	-20.0	2.9
Personal and Household Good Wholesaling	14	25	21	18	19	20	19	21	2	10.5	-1.7
Food Retailing	64	52	54	53	48	51	58	59	1	1.7	1.3
Personal and Household Good Retailing	118	92	111	105	108	113	114	113	-1	-0.9	2.1
Motor Vehicle Retailing and Services	65	64	65	64	63	62	63	58	-5	-7.9	-1.0
Accommodation, Cafes and Restaurants	77	91	113	118	121	128	125	130	5	4.0	3.6
Road Transport	26	47	45	46	44	46	45	44	-1	-2.2	-0.7
Rail Transport	4	5	2	2	2	2	2	2	0	0.0	-8.8
Water Transport	0	0	0	0	0	0	0	0	0	na	na
Air and Space Transport	1	6	3	3	4	4	5	4	-1	-20.0	-4.0
Other Transport	0	0	0	0	0	0	1	1	0	0.0	na
Services to Transport	5	4	8	6	9	7	9	9	0	0.0	8.4
Storage	2	1	4	3	3	2	3	4	1	33.3	14.9
Retail and Distribution	*414*	*418*	*473*	*471*	*474*	*485*	*498*	*498*	*0*	*0.0*	*1.8*
Electricity and Gas Supply	8	8	3	5	4	4	4	5	1	25.0	-4.6
Water Supply, Sewerage and Drainage Services	3	0	2	1	0	2	1	1	0	0.0	na
Communication Services	14	15	15	19	18	16	14	15	1	7.1	0.0
Finance	26	20	23	32	38	51	48	52	4	8.3	10.0
Insurance	7	3	2	1	1	2	2	2	0	0.0	-4.0
Services to Finance and Insurance	10	11	15	18	18	17	18	14	-4	-22.2	2.4
Property Services	71	181	405	427	469	480	510	535	25	4.9	11.4
Business Services	50	62	79	89	93	95	89	102	13	14.6	5.1
Business Services	*189*	*300*	*544*	*592*	*641*	*667*	*686*	*726*	*40*	*5.8*	*9.2*
Motion Picture, Radio and Television Services	3	2	3	4	4	6	6	6	0	0.0	11.6
Libraries, Museums and the Arts	5	9	11	10	12	12	14	14	0	0.0	4.5
Sport and Recreation	25	38	36	41	39	40	36	41	5	13.9	0.8
Personal Services	27	31	37	38	43	44	45	49	4	8.9	4.7
Other Services	31	39	44	46	45	43	43	42	-1	-2.3	0.7
Private Households Employing Staff	0	0	0	0	0	0	0	0	0	na	na
Recreation Services	*91*	*119*	*131*	*139*	*143*	*145*	*144*	*152*	*8*	*5.6*	*2.5*
Government Administration	22	21	13	11	11	11	10	11	1	10.0	-6.3
Defence	1	1	1	2	2	2	1	1	0	0.0	0.0
Education	51	51	49	46	45	47	46	46	0	0.0	-1.0
Health Services	47	49	52	54	55	55	58	61	3	5.2	2.2
Community Services	7	28	22	25	24	22	25	28	3	12.0	0.0
Social Services	*128*	*150*	*137*	*138*	*137*	*137*	*140*	*147*	*7*	*5.0*	*-0.2*
TOTAL ALL INDUSTRIES	**2,490**	**2,458**	**2,635**	**2,713**	**2,803**	**2,841**	**2,853**	**2,877**	***24***	***0.8***	***1.6***
Incl. Tourism	90	103	117	119	123	126	127	129	*2*	*1.7*	*2.3*

Table 14.24 Summary indicators, Waitaki District

BERL Database of TLA ANZSIC Employment, GDP and Business Units

	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Resident population																
Waitaki District	22,548	22,646	21,573	21,362	21,068	20,676	20,382	20,088	19,832	19,735	19,539	19,393	20,223	20,224	20,225	20,226
Otago Region	187,726	190,160	186,960	184,029	183,392	182,462	182,253	183,107	186,493	188,602	190,660	192,139	195,348	197,179	199,017	200,666
New Zealand	3,432,876	3,482,116	3,618,303	3,622,904	3,652,548	3,670,278	3,689,862	3,737,277	3,792,518	3,859,556	3,909,606	3,945,485	4,027,947	4,070,191	4,109,450	4,154,789
Real Value Added GDP (1996$m)																
Waitaki District	458	489	499	510	525	521	521	530	511	540	574	611	582	590	613	629
Otago Region	4,185	4,279	4,365	4,315	4,317	4,348	4,557	4,684	4,851	5,100	5,372	5,563	5,690	5,758	5,906	5,879
New Zealand	85,136	89,675	93,420	96,666	98,335	98,842	104,096	106,553	110,407	115,829	120,813	125,361	129,079	131,438	135,543	134,028
Real Value Added GDP (2009$m)																
Waitaki District	634	678	691	707	727	722	721	733	707	748	794	846	806	817	848	871
Otago Region	5,793	5,924	6,044	5,974	5,977	6,020	6,309	6,485	6,716	7,061	7,437	7,702	7,878	7,971	8,176	8,139
New Zealand	117,866	124,150	129,334	133,828	136,139	136,841	144,115	147,516	152,852	160,358	167,258	173,555	178,702	181,968	187,651	185,554
GDP per capita 1996$																
Waitaki District	20,322	21,612	23,145	23,891	24,926	25,219	25,544	26,363	25,761	27,378	29,361	31,506	28,776	29,181	30,287	31,103
Otago Region	22,291	22,502	23,350	23,449	23,540	23,830	25,003	25,580	26,011	27,042	28,175	28,954	29,129	29,199	29,675	29,297
New Zealand	24,800	25,753	25,819	26,682	26,922	26,930	28,211	28,511	29,112	30,011	30,902	31,773	32,046	32,293	32,983	32,259
GDP per capita 2009$																
Waitaki District	28,135	29,921	32,043	33,076	34,509	34,914	35,365	36,498	35,665	37,903	40,648	43,618	39,838	40,400	41,931	43,060
Otago Region	30,860	31,153	32,326	32,463	32,590	32,991	34,615	35,414	36,011	37,438	39,006	40,085	40,328	40,425	41,083	40,561
New Zealand	34,334	35,654	35,744	36,940	37,272	37,284	39,057	39,472	40,304	41,548	42,781	43,988	44,366	44,707	45,663	44,660
Employment (FTEs)																
Waitaki District	8,157	8,353	8,479	8,154	7,986	7,657	7,760	8,148	7,996	8,182	8,195	8,365	8,312	8,608	8,442	8,886
Otago Region	71,859	73,000	73,782	70,153	69,426	68,939	72,437	74,292	77,358	80,277	82,672	85,568	88,252	89,664	90,440	91,130
New Zealand	1,378,150	1,440,499	1,484,116	1,450,580	1,470,636	1,473,526	1,516,853	1,532,228	1,581,797	1,640,202	1,690,545	1,751,247	1,808,677	1,840,284	1,854,636	1,866,747
Productivity (GDP per FTE employed 1996$) #																
Waitaki District	50,860	53,248	53,690	57,245	60,268	62,460	61,868	60,046	59,166	61,300	65,074	67,999	65,236	63,906	67,712	65,957
Otago Region	52,723	53,269	53,947	56,258	56,991	57,852	58,011	58,246	58,063	58,972	60,404	60,528	60,083	59,853	60,938	60,104
New Zealand	55,929	56,573	57,393	60,948	61,282	61,527	63,284	64,246	64,630	65,551	66,434	66,644	66,501	66,574	68,200	66,891
Productivity (GDP per FTE employed 2009$) #																
Waitaki District	70,412	73,718	74,331	79,252	83,438	86,472	85,653	83,130	81,911	84,866	90,092	94,141	90,315	88,473	93,743	91,314
Otago Region	72,992	73,748	74,686	77,886	78,900	80,092	80,312	80,639	80,385	81,644	83,626	83,797	83,181	82,863	84,365	83,210
New Zealand	77,431	78,322	79,458	84,379	84,841	85,181	87,613	88,945	89,476	90,751	91,974	92,264	92,067	92,168	94,419	92,607
Business units (number)																
Waitaki District	2,490	2,512	2,457	2,534	2,513	2,458	2,426	2,456	2,474	2,543	2,635	2,713	2,803	2,841	2,853	2,877
Otago Region	16,838	17,819	17,867	17,606	18,192	18,258	18,930	19,253	19,982	20,835	22,456	23,651	24,716	25,403	26,092	26,367
New Zealand	314,311	345,019	350,091	354,106	376,513	379,701	406,567	403,645	408,416	422,548	453,662	474,007	490,474	500,728	511,030	512,580
Business size (FTEs per business unit)																
Waitaki District	3.3	3.3	3.5	3.2	3.2	3.1	3.2	3.3	3.2	3.2	3.1	3.1	3.0	3.0	3.0	3.1
Otago Region	4.3	4.1	4.1	4.0	3.8	3.8	3.8	3.9	3.9	3.9	3.7	3.6	3.6	3.5	3.5	3.5
New Zealand	4.4	4.2	4.2	4.1	3.9	3.9	3.7	3.8	3.9	3.9	3.7	3.7	3.7	3.7	3.6	3.6

 # excluded owner-occupied dwellings sector

15 Technical Appendices

15.1 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. This is a measure of the volume of labour used in production, and is calculated as the number of full-time jobs plus half the number of part-time jobs. Note jobs 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 estimates of New Zealand's GDP.

The Value Added data measure is derived from BERL's proprietary *Regional Database*, and is based on trends in labour productivity at the national level and changes in local FTE employment. Real Value Added is measured in constant 2009 price levels removing the effect of inflation.

[17] The reason for using this measure is that it eliminates double counting of outputs of businesses, which 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 farms, millers, bakeries and supermarkets less their purchases from each other (and other businesses). For this reason, Value Added is considered a more accurate measure of the economic impact of combined activities than, say, total sales.

15.2 Sector composition

Table 15.1 Seven sectors of the economy

Primary	Manufacturing	Construction	Retail & distribution	Business services	Recreation services	Social services
Agriculture; Services to Agriculture; Hunting and Trapping; Forestry and Logging; Commercial Fishing; Coal Mining; Oil and Gas Exploration; Metal Ore Mining; Other Mining; Services to Mining	Food, Beverage and Tobacco; Textile, Clothing, Footwear & Leather Mfg; Wood and Paper Product Manufacturing; Printing, Publishing and Recorded Media; Petroleum, Coal, Chemical & Assoc Prod Mfg; Non-Metallic Mineral Product Manufacturing; Metal Product Manufacturing; Machinery and Equipment Manufacturing; Other Manufacturing	General Construction; Construction Trade Services	Basic Material Wholesaling; Machinery and Motor Vehicle Wholesaling; Personal and Household Good Wholesaling; Food Retailing; Personal and Household Good Retailing; Motor Vehicle Retailing and Services; Accommodation, Cafes and Restaurants; Road Transport; Rail Transport; Water Transport; Air and Space Transport; Other Transport; Services to Transport; Storage	Electricity and Gas Supply; Water Supply, Sewerage and Drainage Services; Communication Services; Finance; Insurance; Services to Finance and Insurance; Property Services; Business Services	Motion Picture, Radio and Television Services; Libraries, Museums and the Arts; Sport and Recreation; Personal Services; Other Services; Private Households Employing Staff	Government Administration; Defence; Education; Health Services; Community Services

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Table 15.2 Six key sectors in the local economies

Primary production	Primary processing	Creative	Education & research	Engineering, & machinery and equipment mfg
Agriculture; Services to Agriculture; Hunting and Trapping; Forestry and Logging; Commercial Fishing; Mining and services to mining	Food, Beverage and Tobacco; Wood and Paper Product Manufacturing	Printing; Services to Printing; Newspaper Printing or Publishing; Other Periodical Publishing; Book and other Publishing; Recorded Media Manufacturing and Publishing; Antique and Used Good Retailing; Architectural Services; Computer Consultancy Services; Advertising Services; Commercial Art and Display Services; Film and Video Production; Radio Services; Television Services; Music and Theatre Productions; Creative Arts; Sound Recording Studios; Performing Arts Venues; Services to the Arts nec; Photographic Studios	Preschool Education; Primary Education; Secondary Education; Combined Primary and Secondary Education; Special School Education; Higher Education; Technical and Further Education; Other Education; Scientific Research	Machinery and Equipment Manufacturing; Consultant Engineering Services

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Table 15.3 Dunedin ICT sector

ICT sector
Computer and Business Machine Manufacturing; Telecommunication, Broadcasting and Transceiving Equipment Manufacturing; Electronic Equipment Manufacturing nec; Electric Cable and Wire Manufacturing; Computer Wholesaling; Business Machine Wholesaling nec; Electrical and Electronic Equipment Wholesaling nec; Telecommunication services; Data Processing Services; Information Storage and Retrieval Services; Computer Maintenance Services; Computer Consultancy Services

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