Prepared for the Otago Region

Otago Economic Overview 2012

Final report

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Summary of the Otago Economy Overview 2012

This report describes the economy of the Otago Region in 2012 and its recent performance. It also provides a drilldown into the five local economies that make up the Otago Region: Central Otago District, Clutha District, Dunedin City, Queenstown-Lakes District, and Waitaki District.

This section briefly summarises the composition of the Otago Regional economy, the performance of the regional and local economies in 2012 and over the last decade[1].

Composition of the Otago Regional economy

In 2012, the Otago Region employed 94,606 Full-Time Equivalents (FTEs) in over 26,000 businesses, producing $8.98 billion in Gross Domestic Product (GDP). Summary Table 1 shows the composition of employment, GDP, business units (BUs) in the Otago Region, and shows how much activity, from a national perspective, is located in the Region (as a percentage of the New Zealand total for a sector).

Summary Table 1 Composition of the Otago Regional economy by sector, 2012

Sectors (2012)	FTEs	*% of Otago*	*% of NZ*	GDP (2012$m)	*% of Otago*	*% of NZ*	Business units	*% of Otago*	*% of NZ*
Primary	11,083	*11.7%*	*7.7%*	958	*12.5%*	*6.2%*	4,808	*18.4%*	6.5%
Manufacturing	8,825	*9.3%*	*4.0%*	1,126	*14.7%*	*3.9%*	908	*3.5%*	4.1%
Construction	9,138	*9.7%*	*5.7%*	544	*7.1%*	*5.7%*	2,772	*10.6%*	5.5%
Wholesale and Distribution	6,589	*7.0%*	*3.5%*	866	*11.3%*	*3.5%*	1,492	*5.7%*	4.2%
Retail Trade and Services	20,678	*21.9%*	*6.3%*	1,073	*14.0%*	*6.0%*	4,165	*15.9%*	5.6%
Business Services	13,479	*14.2%*	*3.8%*	1,491	*19.4%*	*2.9%*	9,505	*36.4%*	4.7%
Arts and Recreation Services	2,550	*2.7%*	*8.1%*	173	*2.3%*	*8.1%*	665	*2.5%*	6.7%
Social Services	22,263	*23.5%*	*5.0%*	1,446	*18.8%*	*4.8%*	1,799	*6.9%*	5.3%
Sub-total (excluding O.O.D.)	94,606	*100.0%*		7,678	*100.0%*		26,114	*100.0%*	
*Owner-Occupied Dwellings (O.O.D)**				1,302					
Total	**94,606**		***5.0%***	**8,980**		***5.0%***	**26,114**		**5.2%**

* Imputed value, included in Total GDP only

Source: BERL Regional Database, 2012

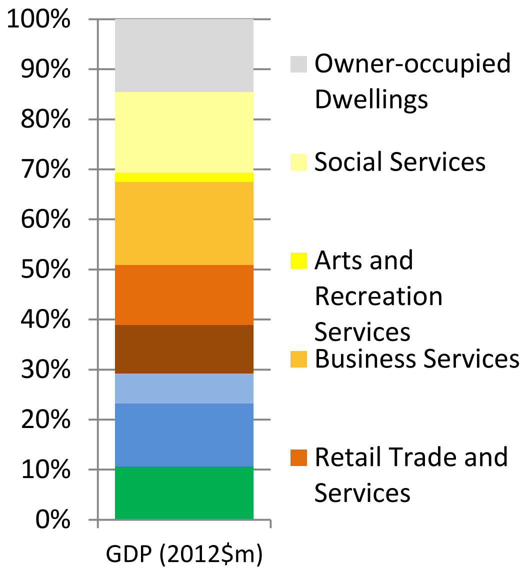
The three major contributors to the region's GDP are the Business Services (19.4 percent), Social Services (18.8 percent), and Manufacturing (14.7 percent) sectors.

- The Business Services sector contributed almost one-fifth of the region's GDP and more than one third of business units in the region in 2012. Reflecting the high value, small size nature of businesses in this sector, it ranked fourth in terms of share of employment (14.2 percent).
- The Social Services sector employed almost one in four workers in 2012, and contributed almost one-fifth of GDP in the Otago Region.
- The Manufacturing sector produced almost 15 percent of the region's GDP and almost 10 percent of employment. It had a relatively small share of the business units as firms in this sector tend to be large.

[1] For purposes of this report, as we typically focus on the change over a decade, we refer to the period from 2002 to 2012.

Summary Figure 1 shows the shares of the Otago Region's GDP, including the imputed value of GDP generated by owner-occupied dwellings. Presented in this way, it can be seen that just over one-half (56.2 percent) of the Region's output was generated in the service sectors[2], around one fifth (18.6 percent) in manufacturing and construction, a tenth (10.7 percent) in primary industries, and a seventh (14.5 percent) by owner-occupied dwellings[3].

Summary Figure 1 Composition of the Otago Region's GDP by sector, 2012



To provide a sense of the relative share of economic activity located in each district in 2012, Summary Table 2 shows the share of employment, GDP, and business units by District.

Summary Table 2 Composition of the Otago Regional economy by District, 2012

Territorial Authority (2012)	FTEs	*% of Region*	GDP (2012$m)	*% of Region*	Business units	*% of Region*
Central Otago District	10,103	11%	926	10%	3,280	13%
Clutha District	8,888	9%	932	10%	3,002	11%
Dunedin City	50,393	53%	4,842	54%	10,658	41%
Queenstown-Lakes District	15,157	16%	1,257	14%	6,316	24%
Waitaki District	10,065	11%	1,024	11%	2,858	11%
Otago Region	**94,606**	**100%**	**8,980**	**100%**	**26,114**	**100%**

Source: BERL Regional Database, 2012

Dunedin City is the site of more than half of the economic activity in the Region in terms of employment and GDP. Queenstown-Lakes District is home to about one sixth of the activity, though almost one quarter of the business units. The other three districts have broadly similar shares (around 10 percent) each for employment, GDP and business units.

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

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

2012 performance

Otago Region

Overall, the Otago Region lifted its GDP by $231 million in 2012, which came with a gain in employment (up about 660 FTEs) brought about by the establishment of 162 new businesses.

Summary Table 3 shows the key performance indicators (KPIs) of the Region's economy. The indicators give an overview of the general economic performance of the region. Figures in green background indicate that the region grew more quickly than the national average; those without a green background show the opposite.

Summary Table 3 Key performance indicators, 2012

Key Performance Indicators	%pa for 2012 year	
	Otago Region	New Zealand
Resident population growth	**0.6**	0.6
GDP growth	**2.8**	1.9
GDP per capita growth	**2.2**	1.3
Employment growth	**0.7**	1.0
Labour productivity growth	**2.4**	1.0
Business units growth	**0.6**	-0.2
Business size growth	**0.1**	1.2

Source: BERL Regional Database, 2012

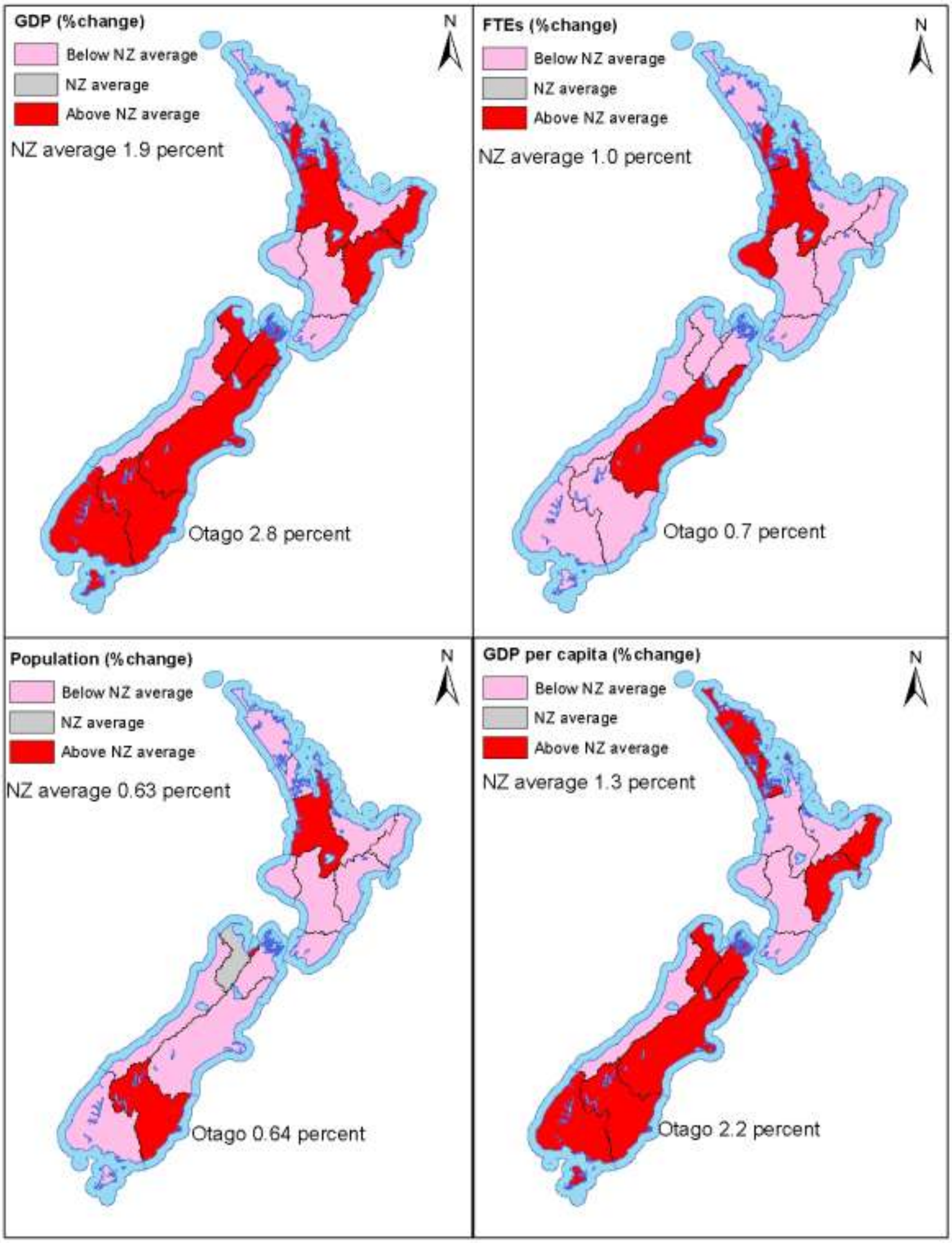
Based on the key performance indicators, the Otago Region performed better than the national economy, but 2012 has been a period of recovery for the Region and the country after the global economic crisis in 2008 to 2010. We illustrate this performance for four indicators over-page.

This recovery shows in the Otago Region's high growth in GDP, GDP per capita, labour productivity and business units compared to the national average. Labour productivity growth was driven by higher than average GDP growth and lower than average employment growth in the Region.

While still positive, the Otago Region had lower growth in employment and business size than the national rates.

In the year to March 2012, the Otago Region also saw its population grow by 0.6 percent, sitting slightly above the national average (although the rounded figures do not clearly show this).

Summary Figure 2 Otago Region and New Zealand, selected KPIs, 2012



The Districts

Summary Table 4 displays the change across seven key performance indicators by district in 2012.

Summary Table 4 Key performance indicators by District, 2012

Key Performance Indicators	%pa for 2012 year						
	Central Otago District	Clutha District	Dunedin City	Queenstown-Lakes District	Waitaki District	**Otago Region**	**New Zealand**
Resident population growth	0.8	-1.1	0.7	1.7	0.0	**0.6**	**0.6**
GDP growth	8.0	7.7	-0.4	5.4	7.0	**2.8**	**1.9**
GDP per capita growth	7.1	8.9	-1.1	3.6	7.0	**2.2**	**1.3**
Employment growth	1.4	0.0	-0.6	4.4	2.3	**0.7**	**1.0**
Labour productivity growth	7.5	8.9	0.0	1.4	5.5	**2.4**	**1.0**
Business units growth	-0.5	0.2	0.2	2.0	0.9	**0.6**	**-0.2**
Business size growth	1.9	-0.2	-0.9	2.3	1.4	**0.1**	**1.2**

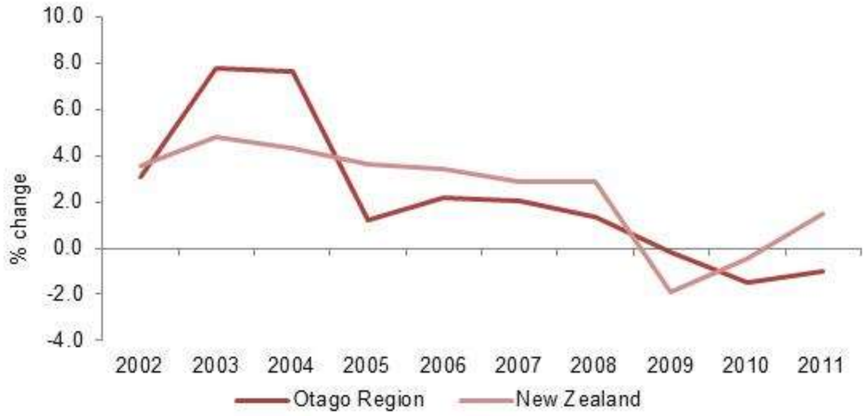
Source: BERL Regional Database, 2012

- The Central Otago District registered growth across most of the key performance indicators, the highest of which is for GDP growth driven by the primary and manufacturing sectors.
- The Central Otago District had a slight decrease in business unit growth brought about by the decline in business units in the construction sector.
- The Clutha District managed growth in some key indicators, a number of which registered contractions in the previous year. However, the resident population growth and business size growth were negative in the year to March 2012.
- The 8.9 percent growth in GDP per capita in the Clutha District was mainly due to the rapid GDP growth, which largely came from primary and business services sectors.
- Dunedin City grew its resident population and business units while labour productivity remained constant. The City grew less quickly than the region across all key performance indicators except for resident population growth. Compared to the national situation, the City performed better in terms of population growth and business unit growth.
- The contraction in Dunedin City's GDP growth, and consequently in GDP per capita growth, was due to the decrease in GDP for construction and manufacturing sectors.
- The Queenstown-Lakes District performed well in the year to March 2012 as reflected by growth in all key performance indicators. The District's growth in all key performance indicators was also higher than the equivalent national rates, and the region except for labour productivity growth, where the regional figure was higher than the District's figure.
- The Queenstown-Lakes District's growth in GDP was occurred in the primary, manufacturing, and wholesale and distribution sectors, but it saw a contraction in the construction sector.
- All of the Waitaki District's key performance indicators showed growth in the year to March 2012, except for resident population growth. Apart from the last indicator, the Waitaki District performed better than the regional and national situations.
- The increase in the Waitaki District's GDP was due to a significant increase in the primary and manufacturing sectors, which offset the decrease in GDP in the construction sector.

The decade, 2002-2012

The Otago Region's GDP growth broadly moves with New Zealand's trend. Summary Figure 3 shows the GDP growth trend for the Otago Region and New Zealand over the last ten years. There was separation in 2003 and 2004 where Otago grew faster than New Zealand before the gap closed again. The Otago Region did not feel the recession in 2008 as quickly or as sharply as New Zealand, and seems to have moved into a recovery phase in 2011.

Summary Figure 3 Otago Region and New Zealand GDP growth trend, 2002 - 2012



Source: BERL Regional Database, 2012

Otago Region

Over the last 10 years, the Otago Region performed broadly in line with the national economy on five of the seven key performance indicators; population and GDP growth were slightly slower, as shown in Summary Table 5. Business size growth was negative lagged behind the national average.

Summary Table 5 Key performance indicators for Otago Region, 2002 - 2012

Key Performance Indicators	%pa for 2002 - 2012	
	Otago Region	New Zealand
Resident population growth	**1.0**	1.2
GDP growth	**2.2**	2.3
GDP per capita growth	**1.2**	1.1
Employment growth	**1.8**	1.8
Labour productivity growth	**0.4**	0.5
Business units growth	**2.7**	2.1
Business size growth	**-0.8**	-0.3

Source: BERL Regional Database, 2012

GDP and employment growth over the past 10 years were largely influenced by activities in the construction, primary, retail trade and services, and business service sectors. Rising employment drove much of the growth in GDP, so the growth in productivity was more modest than employment.

The Districts

Summary Table 6 displays economic performance by district-level over the decade to 2012.

Summary Table 6 Key performance indicators by district, 2002 - 2012

Key Performance Indicators	%pa for 2002 - 2012 Central Otago District	Clutha District	Dunedin City	Queenstown-Lakes District	Waitaki District	**Otago Region**	**New Zealand**
Resident population growth	2.0	-0.1	0.5	4.3	0.2	**1.0**	**1.2**
GDP growth	4.3	1.9	1.2	5.0	3.0	**2.2**	**2.3**
GDP per capita growth	2.2	2.0	0.6	0.7	2.8	**1.2**	**1.1**
Employment growth	3.4	0.8	1.1	4.1	2.0	**1.8**	**1.8**
Labour productivity growth	1.0	1.3	-0.1	0.8	1.3	**0.4**	**0.5**
Business units growth	3.1	0.6	1.8	6.3	1.4	**2.7**	**2.1**
Business size growth	0.4	0.2	-0.6	-2.1	0.6	**-0.8**	**-0.3**

Source: BERL Regional Database, 2012

Although population growth for the Region has been slower than the national average over the decade, there were pockets of relatively fast growth in the Queenstown-Lakes District (4.3 percent) and the Central Otago District (2.0 percent). This growth is echoed in the indicators for employment, GDP, labour productivity, and business units.

This relatively fast population growth in these two districts was counterbalanced, at a regional level, by modest population growth in Dunedin City, the Waitaki District and the slight contraction in the Clutha District.

Reflecting an on-going trend, Dunedin City's economy over 2002 to 2012 was quite subdued compared the region and nation.

Key sectors

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

- tourism[4]
- primary production
- primary processing
- creative
- education and research
- engineering, and machinery and equipment manufacturing.

Growth across these sectors was mixed over the last year and for the last six years (for which monitors are available).

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

Tourism sustained its solid growth performance across the measures of employment, GDP and business units, as shown in Summary Table 7 (which reports the average percentage change per annum over the decade to 2012). This sector compensated for employment losses and slow growth in the other key sectors in 2012. In the long-term, employment growth in this sector has been stable, with a 3.8 percent annual increase since 2002. The Tourism sector led the Otago Region in terms of sustaining GDP gains and expanding businesses over the last ten years.

Summary Table 7 Indicators for tourism sector, 2002 - 2012

Tourism	% pa for 2002 - 2012		
	FTE	GDP	Business Size
Tourism-characteristic industries	4.1	5.0	3.8
Tourism-related industries	1.7	6.5	4.0
All non-tourism-related industries	4.8	4.7	5.5
Tourism Sector	3.8	5.2	4.0
Total: Otago Region	1.8	2.2	2.7

Source: BERL Regional Database

In terms of GDP contribution, the Primary Production; Engineering, Machinery and Equipment Manufacturing; and Education and Research sectors kept the regional economy afloat in 2012. These sectors have compensated for an overall reduction in GDP contributions by the other sectors. Over the last decade, the Education and Research; and the Engineering, Machinery, and Equipment Manufacturing sectors had seen rapid output growth and increased employment and business size. GDP rising faster than employment can be attributed to labour productivity gains in the Education and Research; and the Engineering, Machinery, and Equipment Manufacturing sectors.

Summary Table 8 Key indicators for other key sectors, 2002 - 2012

Other key sectors	%pa for 2002 - 2012		
	FTE	GDP	Business Size
Primary production	1.6	3.1	-0.9
Primary processing	-3.2	-0.8	0.9
Creative	-1.1	-1.3	-1.3
Education and research	5.1	2.1	1.8
Engineering, machinery and equipment manufacturing	2.0	2.7	3.5
Total: Other key sectors	**1.1**	**1.4**	**-0.4**
Total: Otago Region	**1.8**	**2.2**	**2.7**

Source: BERL Regional Database 2012

Otago Economic Overview 2012

Tables

Figures

1 Introduction

This report describes the economic performance of the Otago Region in 2012. It provides key economic indicators for the five local economies that make up the Otago Region - Central Otago District, Clutha District, Dunedin City, Queenstown-Lakes District, and Waitaki District.

The economic overview uses data for the year ending March 2012 from BERL's Regional Database, which BERL constructs from Statistics New Zealand data. The key Business Demography data is gathered around March each year and is usually available by October/November of the same year.

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

- Primary
- Manufacturing
- Construction
- Wholesale and Distribution
- Retail Trade and Services
- Business services
- Arts and Recreation Services
- Social Services.

This report also looks at key sectors in the Otago Region economy. The analysis shows GDP, employment and business unit growth for the region and for each district to 2012. The sectors are:

- Tourism[7]
- Primary Production
- Primary Processing
- Creative
- Education & Research
- Engineering, Machinery & Equipment Manufacturing.

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

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

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

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

1.1 Structure of the report

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

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

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

1.2 Methodological issues: caveats, revisions and improvements

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

Sections 8.1 and 8.2 in the technical appendix, document these issues more fully.

1.2.1 Caveats related to the estimation of regional GDP for the agriculture industry group

In the year to March 2012, New Zealand's agricultural industry group – which includes the Horticulture and Fruit, Sheep and Beef, Dairy, and Other Livestock Farming industries – grew by 30.8 percent while its employment contracted by 0.6 percent. Much of the group's GDP growth is likely to have been driven by the dairy industry. However, this will not be directly reflected in the industry's employment, which BERL uses to estimate regional GDP by industry, as it does not reflect productivity changes. As such, the GDP estimates for non-dairy agricultural industries are likely to be overstated, while those for the dairy industry are likely to be understated. Appendix 8.2.6 explains this in more detail. Below we note what this means for interpreting the 2012 results for the Otago Region.

In year to March 2012, the Otago Region's agricultural employment rose, rather than falling, and its other agricultural industries are proportionately larger than the dairy industry compared to the nation. These factors mean that the GDP estimates for the non-dairy agricultural industries in the region and its districts will be higher than is actually the case. We suggest focusing more on the employment levels and changes for these industries, as these are based on finer level official statistics.

1.2.2 Classification changes

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

BERL started implementing ANZSCI06 in our regional database in 2011. BERL revised the data series in the BERL Regional Database to conform to the new industry classifications, and all data from previous years up to and including 2012 are consistently classified using this standard.

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

1.2.3 Revisions to the official statistics

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

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

1.2.4 Revisions to the BERL Regional Database

BERL routinely checks its estimates of regional economic activity when updating the Database. Where significant, anomalous changes for a particular activity measure for an area/industry cannot be rationalised or verified, these changes may be adjusted to reflect a longer-term trend. For example, in preparing the “Economic Profile and Performance 2011: Otago Region” report, we noted that the Food Processing industry in the Region registered a reduction of 1,000 FTEs in three sub-industries even though the number of business units in this industry remained static. After further investigation with Council staff, the source of this change could not be identified. Therefore, the suspect statistics for the three sub-industries were overwritten for 2011 to indicate no change from the previous year.

However, the latest statistics for the Food Processing industry indicate that employment in 2012 has remained at a similar level as the uncorrected 2011 figure. Based on this new information, we have revised the 2011 figure recorded in the BERL database. This revision means that employment for 2011 for the Region reported in here is around 1,000 FTEs lower than in our previous report.

1.2.5 Estimation of employment at a fine level by industry and area

As part of transitioning the BERL Regional Database to ANZSIC06, the Database employs an improved methodology to estimate full time/part time/self-employment patterns at a fine industry and area level. This methodological change method means that the regional employment by industry figures for a given year reported here will not match the corresponding figure in previous reports (for example, 2011). Employment by area and industry for different years reported here can be compared to other figures in *this report*, but should not be directly compared with figures in *previous reports*.

2 Otago Region

This section gives an overview of the Otago Region's latest and longer term economic performance. The review begins with the most recent performance, for the year to March 2012, and then considers the longer-term trends over the decade, 2002-2012. The remainder of the section examines, in turn, the Region's performance in terms of employment, GDP, business units, relative strengths (location quotients) and in key sectors.

2.1 Economic performance

Table 2.1 shows key performance indicators for the Otago Region compared to New Zealand in 2012. Figures in green background indicate that the region grew more quickly than the national average; those without a green background the opposite.

Table 2.1. Key performance indicators, Otago Region and New Zealand, 2012

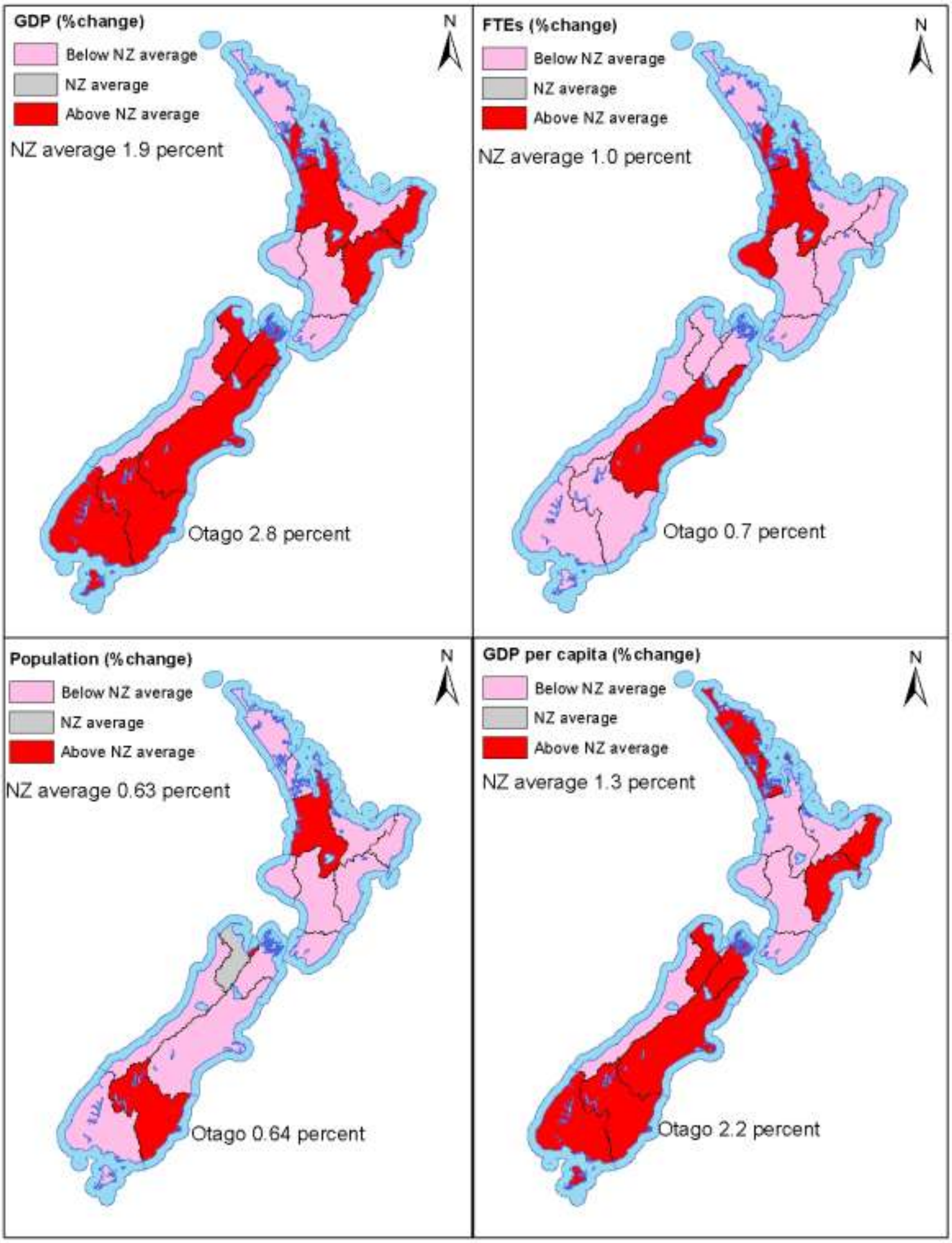
Key Performance Indicators	%pa for 2012 year	
	Otago Region	New Zealand
Resident population growth	**0.6**	0.6
GDP growth	**2.8**	1.9
GDP per capita growth	**2.2**	1.3
Employment growth	**0.7**	1.0
Labour productivity growth	**2.4**	1.0
Business units growth	**0.6**	-0.2
Business size growth	**0.1**	1.2

Source: BERL Regional Database, 2012

- Based on the key performance indicators, the Otago Region performed better than the country as a whole.
- This is shown by the higher growth in population, GDP, GDP per capita, labour productivity and business units.
- The Otago Region, however, had lower growth in employment and business size than the national figures.

Figure 2.1 presents in maps the results of Table 2.1 on selected key performance indicators.

Figure 2.1. Otago Region and New Zealand percent change in selected KPIs, 2012



2.2 The decade

Over the last 10 years, the Otago Region performed slightly below the national economy on four key indicators, but importantly, it was ahead on employment and GDP per capita growth. Table 2.2 displays economic performance at the regional level over the 10-year horizon to 2012.

Table 2.2. Key performance indicators, Otago Region and New Zealand, 2002-2012

Key Performance Indicators	%pa for 2002 - 2012 Otago Region	New Zealand
Resident population growth	**1.0**	1.2
GDP growth	**2.2**	2.3
GDP per capita growth	**1.2**	1.1
Employment growth	**1.8**	1.8
Labour productivity growth	**0.4**	0.5
Business units growth	**2.7**	2.1
Business size growth	**-0.8**	-0.3

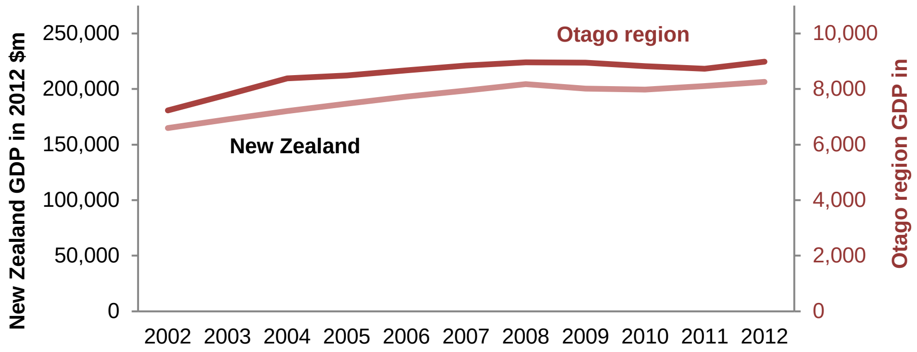
Source: BERL Regional Database, 2012

Population growth has been relatively slow in the Region, with a regional average of 1.0 percent over the last decade. The growth was mainly driven by average annual population growth of 4.3 percent in the Queenstown-Lakes District and 2.0 percent in the Central Otago District.

GDP and employment growth over the past 10 years was positively influenced by activities in the construction, primary, retail trade and services, and business service sectors. However, labour productivity growth in the Region has been subdued over the decade.

Figure 2.2 shows the GDP growth trend for the Otago Region (right axis) and New Zealand (left axis).

Figure 2.2. Otago Region and New Zealand GDP growth trend, 2002 to 2012



Source: BERL Regional Database, 2012

The Otago Region and New Zealand GDP growth trends broadly move together. There was separation in 2003 and 2004 where Otago grew faster than New Zealand before the gap closed again. The Otago Region did not feel the recession in 2008 as quickly or as sharply as New Zealand, and seems to have moved into a recovery phase in 2011.

2.3 Employment – Otago Region

This section looks at employment trends in the Otago Region and compares them to overall New Zealand trends. It also outlines employment trends by sector in 2012 and over the past 10 years.

The Otago Region continued to experience employment gains in 2012, up 664 FTEs or 0.7 percent. However, regional employment growth has yet to return to its decade high, which it reached in 2009.

2.3.1 Employment trends

Table 2.3 provides a summary of employment in the Otago Region from 2002 to 2012 broken down by eight sectors.

Table 2.3. FTE summary, Otago Region, 2002 - 2012

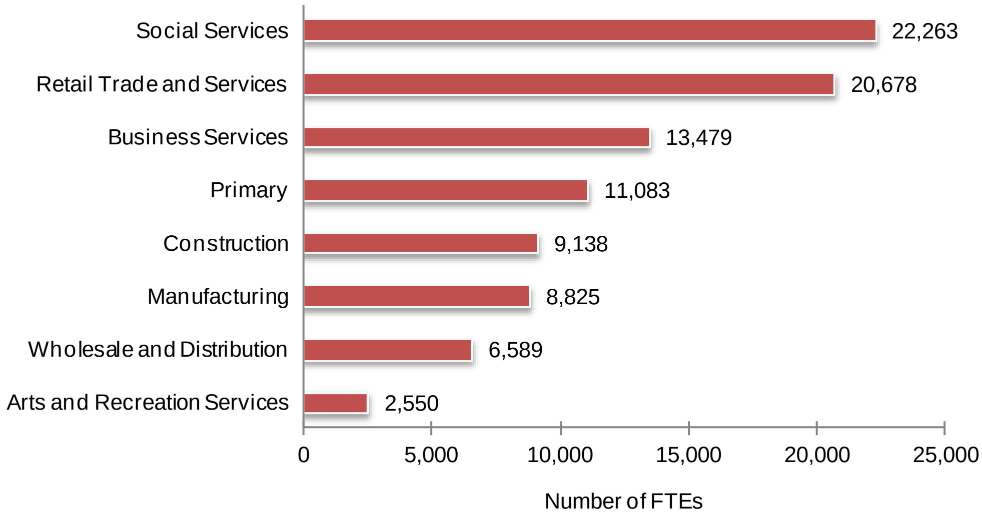
Sector	Employment Number FTEs				%pa change		
	2002	2010	2011	2012	2011	2012	2002 to 2012
Primary	9,478	10,044	10,727	11,083	6.8	3.3	1.6
Manufacturing	12,074	10,068	8,810	8,825	-12.5	0.2	-3.1
Construction	6,085	10,035	9,408	9,138	-6.2	-2.9	4.2
Wholesale and Distribution	5,941	6,353	6,354	6,589	0.0	3.7	1.0
Retail Trade and Services	18,794	19,656	20,277	20,678	3.2	2.0	1.0
Business Services	10,544	13,329	13,386	13,479	0.4	0.7	2.5
Arts and Recreation Services	1,777	2,477	2,429	2,550	-1.9	5.0	3.7
Social Services	14,223	21,763	22,552	22,263	3.6	-1.3	4.6
Otago Region	**78,916**	**93,726**	**93,942**	**94,606**	**0.2**	**0.7**	**1.8**
New Zealand	**1,578,933**	**1,832,175**	**1,860,767**	**1,879,245**	**1.6**	**1.0**	**1.8**

Source: BERL Regional Database, 2012

The Otago Region had about 95,000 people working full-time in the year to March 2012. Employment grew in 2012 by 0.7 percent. This was lower than both the national employment growth and the region's long-term employment growth of 1.8 percent per annum.

Figure 2.3 shows the key sector employment in the Otago Region in 2012.

Figure 2.3. Key sector employment, Otago Region, 2012



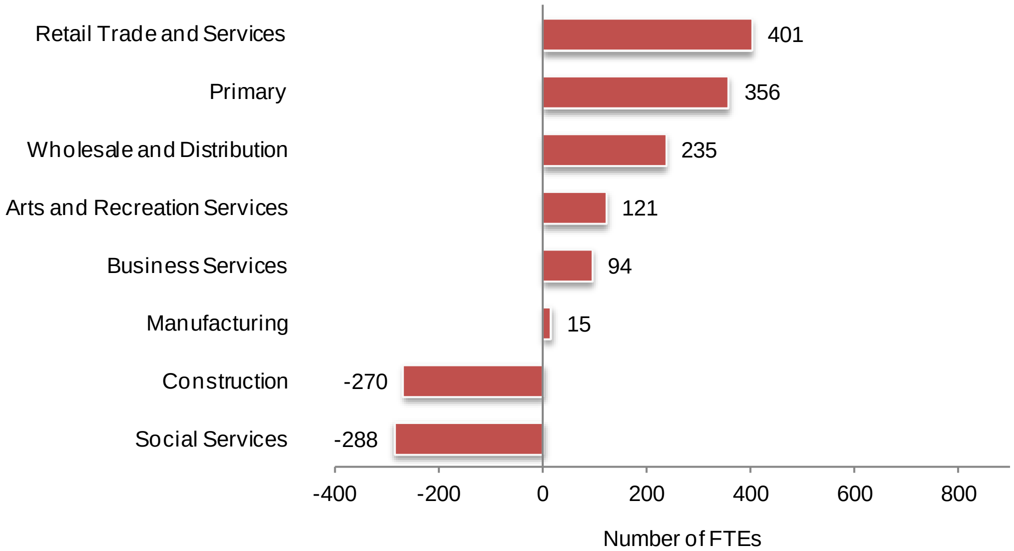
Source: BERL Regional Database, 2012

Of the 94,610 full-time employees, almost a quarter are in the Social Services sector (around 22,260 people), which is the largest sector of employment in the Otago Region. Most of those working in the Social Services sector are in Hospitals, Education, and Public Order Safety and Regulatory Services.

Other significant sectors of employment in the Otago Region includes approximately 20,680 employees in Retail Trade and Services sector, 13,480 employees in the Business Services sector, and 11,080 employees in the Primary sector.

Figure 2.4 shows the change in employment in the key sectors in 2012.

Figure 2.4. Employment change by sector, 2012



Source: BERL Regional Database, 2012

In 2012, the Otago Region added 1,221 FTEs. The main expansions came from:

- Retail Trade and Services (401 FTEs)
- Primary (356 FTEs)
- Wholesale and Distribution (235 FTEs)
- Arts and Recreation Services (121 FTEs)
- Business Services (94 FTEs)
- Manufacturing (15 FTEs).

These gains in employment were greater than the employment losses in:

- Construction (-270 FTEs)
- Social Services (-288 FTEs).

This resulted in a net increase in employment of 664 FTEs in the Otago Region in 2012.

Of those sectors which had employment gains in the year to March 2012, the leading contributors to the increase in employment in the Retail and Trade and Services were accommodation-related industries (up 261 FTEs), and food and beverage industries (162 FTEs). Of the jobs created in the Primary sector, about 250 FTEs were in the agriculture industry and almost 140 FTEs came from agriculture, forestry and fishing support services.

Figure 2.5 (on page 11) shows the employment by sector in each of the territorial authorities. Dunedin City and Clutha District had employment growth rates below the Otago Region average (shown in light pink) while the remaining three districts had higher GDP growths than the Otago Region (shown in darker red) did.

Moving below the sector level, Table 2.4 presents the Region's industries with the greatest employment in 2012.

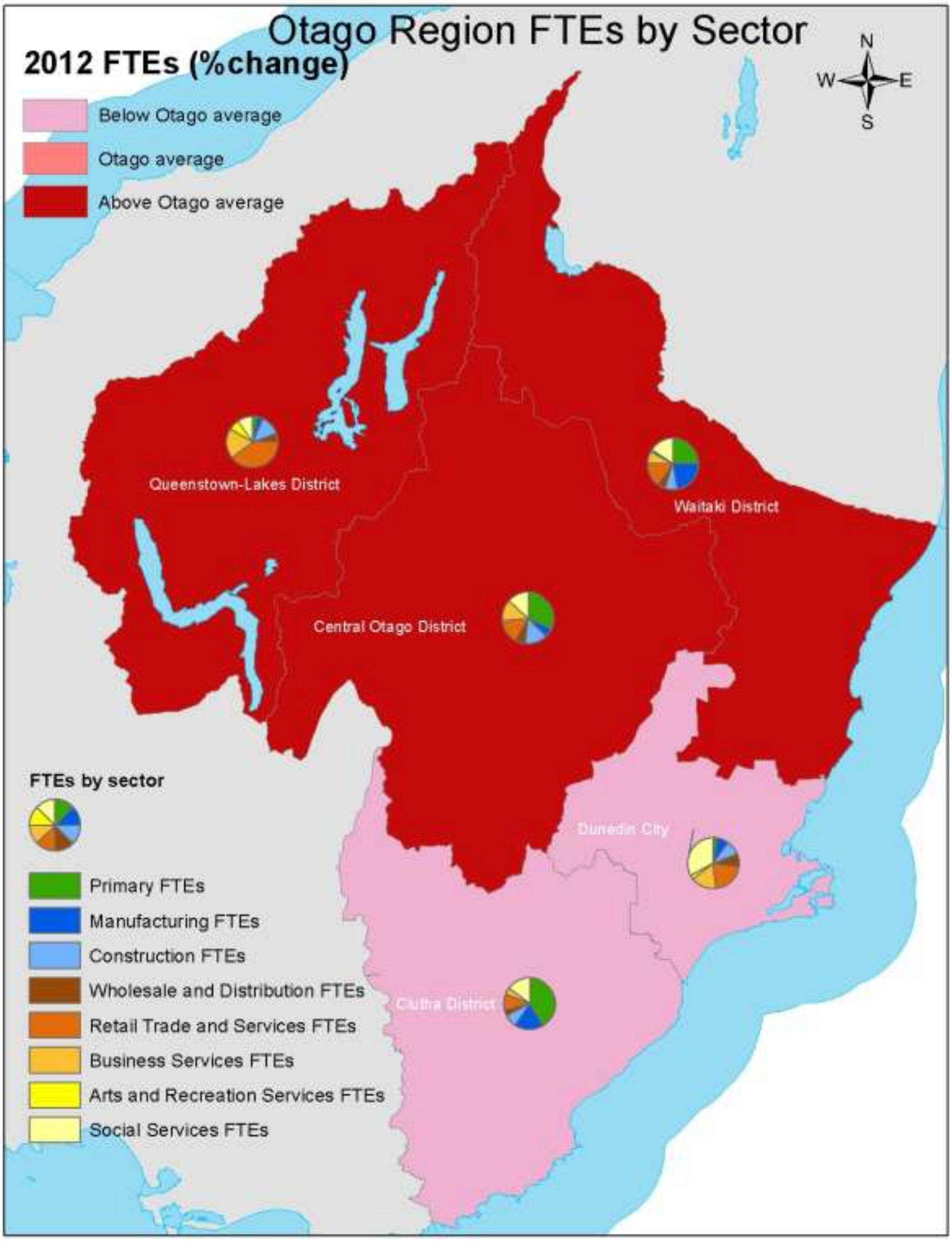
Table 2.4. Ten largest employment industries, Otago Region, 2012

Rank by FTE size	Industry	Employment (FTEs) 2012	Employment (FTEs) % of total
1	Agriculture	8,228	8.7
2	Food and Beverage Services	4,943	5.2
3	Other Store-Based Retailing	4,805	5.1
4	Construction Services	4,588	4.9
5	Professional Scientific and Technical Services (exc Comp Sys Dsn & related)	4,325	4.6
6	Tertiary Education	4,282	4.5
7	Food Product Manufacturing	4,082	4.3
8	Accommodation	3,943	4.2
9	Preschool and School Education	3,893	4.1
10	Hospitals	3,598	3.8

Source: BERL, Statistics NZ

Agriculture is the largest employer in the region, accounting for 8.7 percent of total employment. Other industries in the top ten include the Food and Beverage Services and Other Store-Based Retailing industries.

Figure 2.5. FTEs by industry, Otago Region, 2012



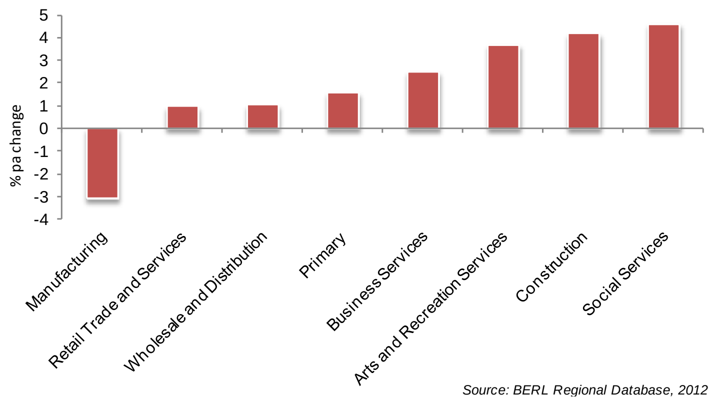
The largest share of employees in Central Otago; Clutha; and Waitaki Districts are in the Primary sector. The Social Services sector is Dunedin City's biggest sector, by employment, which includes the Education industry. For the Queenstown-Lakes District, the Retail Trade and Services sector employees the largest share. See section 8.4 (page 147) for a table of the figures used for the chart.

2.3.2 10-year horizon employment performance

Employment growth in the region was modest from 2002 to 2012. Regional employment peaked in 2009 at around 96,000 FTEs. The region's strong employment gains prior to the 2008 economic slowdown helped keep its overall per annum growth at two percent over the last ten years. Employment dipped slightly in 2010, but recovered in 2011 and 2012.

Figure 2.6 shows the average growth rate over the last ten years in the Otago Region for the eight sectors.

Figure 2.6. Employment trend by sector, Otago Region, 2002 - 2012

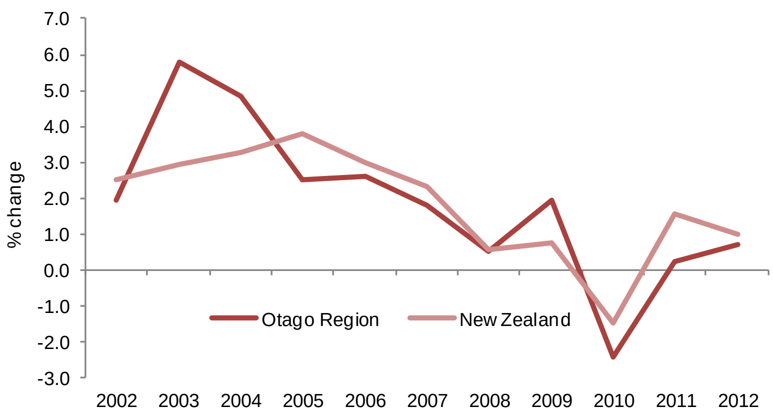


Source: BERL Regional Database, 2012

In terms of sector-level performance, the Social Services sector was the fastest growing, followed by the Construction sector. Employment growth from 2002 to 2012 was positive for all sectors, except the Manufacturing sector.

Figure 2.7 compares employment growth in the Otago Region with New Zealand from 2002 to 2012.

Figure 2.7. Employment growth, Otago Region and New Zealand, 2002 to 2012



Source: BERL Regional Database, 2012

Sustaining solid employment growth has been a challenge since 2005, both at the national and regional level. The credit crunch, and weak investment and consumption spending at the macro-level have resulted in business closures and an easing of employment in New Zealand over the period. Looking ahead, improving businesses and consumer confidence, and the rebuilding of Christchurch could trigger economic activity, and thus demand for labour and services from nearby regions like Otago.

Business Services sector

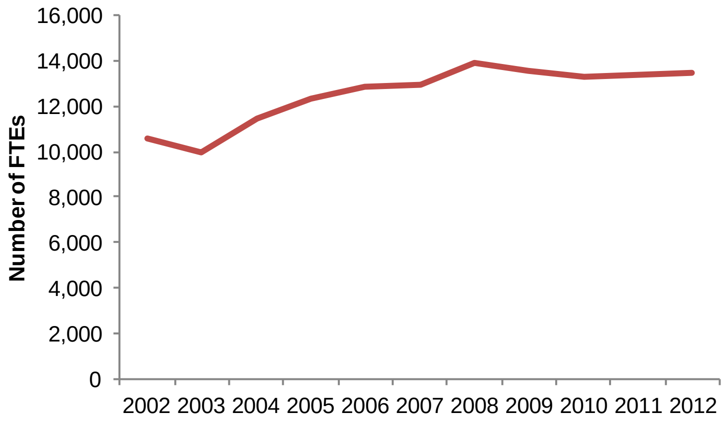
The Business Services sector remains a vital component of Otago's regional economy the Otago Region over the last ten years.[8] In 2012, the sector employed more than 13,000 people, or about 15 percent of the FTEs in the region, in about 9,500 business units. The top five business service industries in terms of employment are:

- Professional, Scientific and Technical Services (4,325 FTEs)
- Administrative Services (2,795 FTEs)
- Building Cleaning, Pest Control and Other Support Services (1,153 FTEs)
- Finance (941 FTEs)
- Publishing (761 FTEs).[9]

At the industry level, the sector has four of the top ten industries with the fastest employment growth over the same period - Waste Collection, Treatment, and Disposal Services; Rental and Hiring Services (except Real Estate); Insurance and Superannuation Funds; and Electricity Supply.

Figure 2.8 shows the change in business services employment from 2002 to 2012.

Figure 2.8. Employment trend in the Business Services sector, Otago Region, 2002 - 2012



Source: BERL Regional Database, 2012

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

[9] This industry classification excludes internet and music publishing.

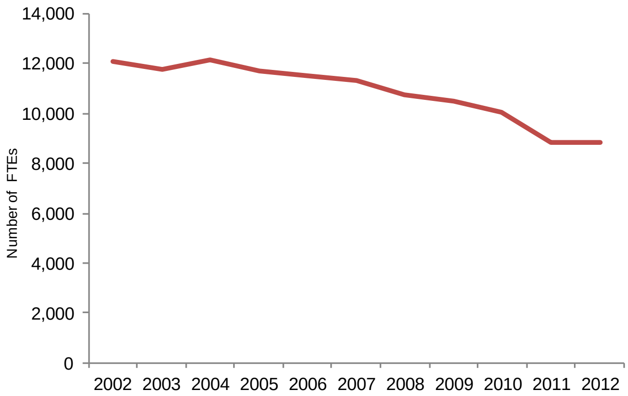
Since 2002, this sector had growth, up until 2008 when the global recession hit. However, starting in 2011, employment in the Business Services sector is slowly recovering from the recession.

Manufacturing sector

The Manufacturing sector has had setbacks in terms of both GDP and employment over the past 10 years. The sector's overall performance in these indicators relies largely on food product manufacturing activities such as Primary Product Processing (i.e. Meat Processing, Milk, and Cream Processing) and Confectionary Manufacturing. Since 2005, employment in Food Product Manufacturing in the region has eased because of scaling back and closures.

Figure 2.9 shows the change in employment in the manufacturing sector in the Otago Region from 2002 to 2012.

Figure 2.9. Employment trend in the Manufacturing sector, Otago Region, 2002-2012



Source: BERL Regional Database, 2012

In 2012, the sector had a substantial gain in employment in the Food Product Manufacturing industries and small increases in various industries (such as Beverage and Tobacco Product Manufacturing and Primary Metal and Metal Product Manufacturing), which balance the decline in FTEs in the Pulp Paper and Converted Paper Product Manufacturing and Transport and Equipment Manufacturing industries.

The Otago Region's manufacturing sector has struggled to maintain employment, losing an average of about 325 FTEs per annum (or 3.1 percent) over the past decade. The sector's employment peaked in 2004 at 12,180 FTEs and then started trending downwards, dropping to 11,714 FTEs in 2005. By 2012, employment in the Region's manufacturing sector had dropped to 8,825 FTEs. The industries with the largest losses (in FTE terms) of employment between 2002 and 2012 include:

- Food Product Manufacturing (-1,883 FTEs)
- Textile, Leather, Clothing and Footwear Manufacturing (-710 FTEs)
- Machinery and Equipment Manufacturing (-530 FTEs).

Retail Trade and Services sector

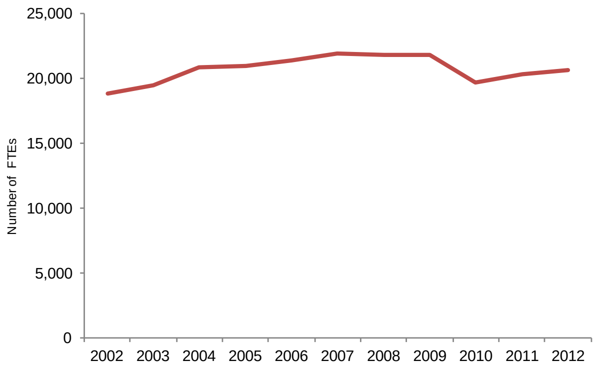
The Retail Trade and Services sector employed over 20,000 people in 2012.[10] Of the industries in the sector, the largest are:

- Food and Beverage Services (4,934 FTEs)
- Other Store-Based Retailing (4,805 FTEs)
- Accommodation (3,943 FTEs)
- Food Retailing (3,047 FTEs).

The Otago Region can boast as being one of New Zealand's best travel and holiday destinations. The flow of domestic and international visitors to the region supported retail trade and services industries, which averaged FTE growth of 1.0 percent per annum from 2002 to 2012. The sector has generated over 188 jobs per annum for people in the Otago Region since 2002. Over the same period, employment grew faster than the national average for Retail Trade and Services.

Figure 2.10 shows that regional employment in Retail Trade and Services increased steeply in the early 2000s, and flattened after slipping in 2008 before showing recovery in 2011.

Figure 2.10. Employment trend in the Retail Trade and Services sector, Otago Region, 2002 to 2012



Source: BERL Regional Database,2012

Some of the industries had employment gains over the past 10 years. The industries with positive employment growth since 2002 are as follows:

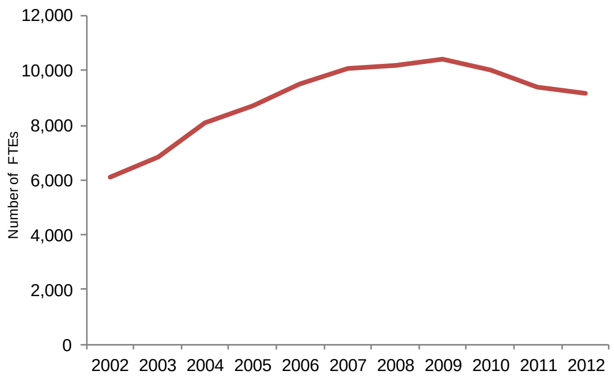
- Accommodation (3.0 percent)
- Food and Beverage Services (2.8 percent)
- Repair and Maintenance (1.7 percent)
- Personal and Other Services (1.3 percent).

[10] The sector includes businesses engaged in accommodation, food and beverage services, store and non-store retailing, and personal and other services.

Construction sector

The economic slowdown in 2008 saw employment in the sector ease in 2008 before declining in 2009. Building and Construction activity remained weak since 2010 until 2012, with employment continuing to decline. Like most regions throughout the country, demand for building consents remained low, as tight credit conditions prevail and households and businesses focused on reducing their debt burden.

Figure 2.11. Employment trend in the Construction sector, Otago Region, 2002-2012



Source: BERL Regional Database, 2012

The Region saw employment growth (4.2 percent per annum on average over the decade) mainly in the first half of the decade. The Otago Region's Construction sector has yet to bring employment back up to its pre-recession level.

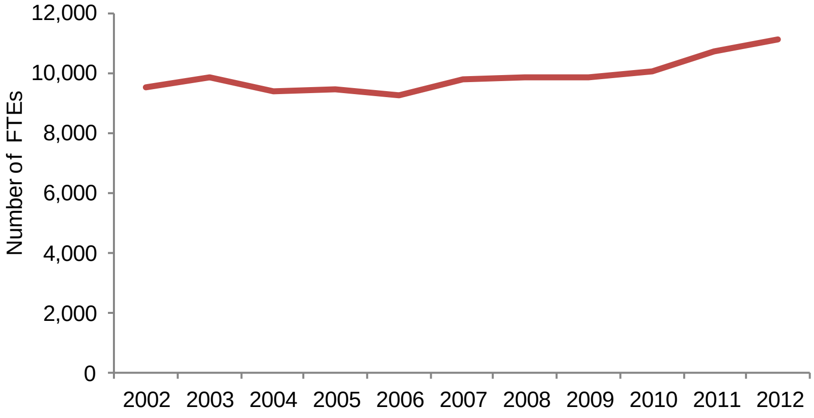
Primary sector

The Primary sector makes up over 10 percent of regional employment. In the year to March 2012, the sector contributed about 11,083 FTEs to employment in the Otago Region. Compared to the other sectors, the Primary sector had the third fastest employment growth (up 3.3 percent or 356 FTEs) in 2012. The largest employers in the Primary sector are:

- Agriculture (8,228 FTEs)
- Agriculture, Forestry and Fishing Support Services (1,868 FTEs)
- Metal Ore Mining (530 FTEs)
- Forestry and Logging (240 FTEs).

Figure 2.12 shows the employment trend in the Region's Primary sector in the decade to 2012.

Figure 2.12. Employment trend in the Primary sector, Otago Region, 2002-2012



Source: BERL Regional Database, 2012

From 2002 to 2012, the sector added an average of 257 FTEs annually (3.1 percent per annum) to the total number of FTEs in the region. The fastest growing sectors in terms of employment over the past 10 years are:

- Metal Ore Mining (13.4 percent per annum)
- Aquaculture (4.5 percent)
- Agriculture, Forestry and Fishing Support Services (2.9 percent per annum)
- Coal Mining (2.6 percent per annum).

2.4 GDP - Otago Region

This section looks at GDP for the Otago Region. It describes GDP for the Otago Region and compares the region's performance to New Zealand.

2.4.1 2012 economic performance

Table 2.5 shows GDP by eight sectors in the Otago Region from 2002 to 2012.

Table 2.5. GDP summary, Otago Region, 2002-2012

Sector	Value Added or GDP (2012$m)				%pa change		
	2002	2010	2011	2012	2011	2012	2002 to 2012
Primary	704	779	770	958	-1.2	24.5	3.1
Manufacturing	1,235	1,265	1,101	1,126	-13.0	2.3	-0.9
Construction	412	612	606	544	-0.9	-10.3	2.8
Wholesale and Distribution	713	811	842	866	3.8	2.9	2.0
Retail Trade and Services	795	992	1,019	1,073	2.7	5.3	3.0
Business Services	1,097	1,496	1,461	1,491	-2.3	2.1	3.1
Arts and Recreation Services	132	165	170	173	2.7	1.8	2.7
Social Services	1,096	1,420	1,479	1,446	4.2	-2.2	2.8
Owner-Occupied Dwellings	*1,043*	*1,279*	*1,285*	*1,302*	*0.4*	*1.3*	*2.2*
Otago Region	**7,227**	**8,819**	**8,732**	**8,980**	**-1.0**	**2.8**	**2.2**
New Zealand	**164,809**	**199,624**	**202,607**	**206,546**	**1.5**	**1.9**	**2.3**

Source: BERL Regional Database, 2012

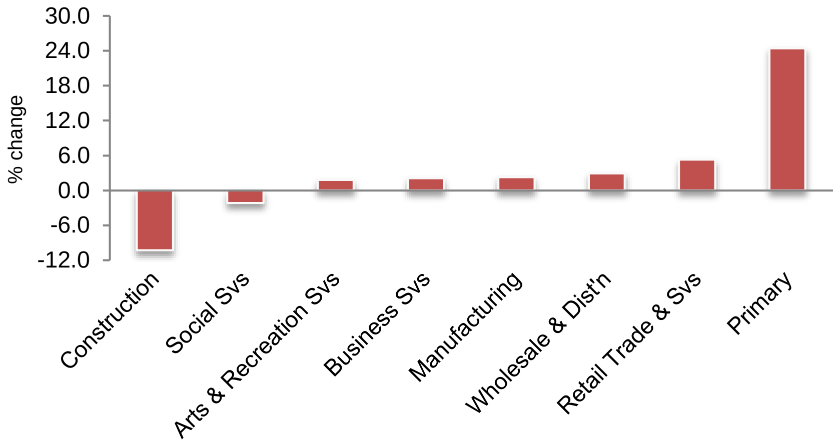
The Otago Region's 2012 GDP is valued at $8.98 billion, up slightly from $8.73 billion in 2011. The Otago Region's economy was 2.8 percent bigger in 2012 than a year earlier. This was an improvement from 2011, where the economy had contracted by 1.0 percent on 2010. The leading contributors to this gain in 2012 were Primary (up 24.5 percent), Retail Trade and Services (up 5.3 percent), Wholesale and Distribution (up 2.9 percent), Manufacturing (up 2.3 percent), Business Services (2.1 percent), and Arts and Recreation Services (up 1.8 percent) sectors.

The Business Services sector, the largest sector in terms of contribution to GDP in 2012, had GDP net gains of $31 million. This is attributed to the increase in GDP in the Rental and Hiring Services (except Real Estate) industries and Professional Scientific and Technical Services (excluding Computer System Design & related) industries.

The biggest contributor to the $63 million decrease in the Construction sector is the Construction Services industries (down $33 million), followed by the Building Construction industries (down $18 million). The weak performance of these industries was offset by the other sectors that led to an overall growth in GDP in 2012.

Figure 2.13 shows the change in GDP in the year to March 2012 by sector in the Otago Region.

Figure 2.13. GDP growth by sector, Otago Region, 2012



Source: BERL Regional Database, 2012

Table 2.6 shows the top ten industries in the Otago Region by GDP.

Table 2.6. Ten largest industries by GDP, Otago Region, 2012

Rank by GDP size	Industry	GDP (2012$m) 2012	% of total
1	Agriculture	618	6.9
2	Food Product Manufacturing	546	6.1
3	Professional Scientific and Technical Services (exc Comp Sys Dsn & related)	402	4.5
4	Other Store-Based Retailing	344	3.8
5	Hospitals	276	3.1
6	Construction Services	273	3.0
7	Road Transport	253	2.8
8	Food Retailing	218	2.4
9	Tertiary Education	211	2.4
10	Preschool and School Education	192	2.1

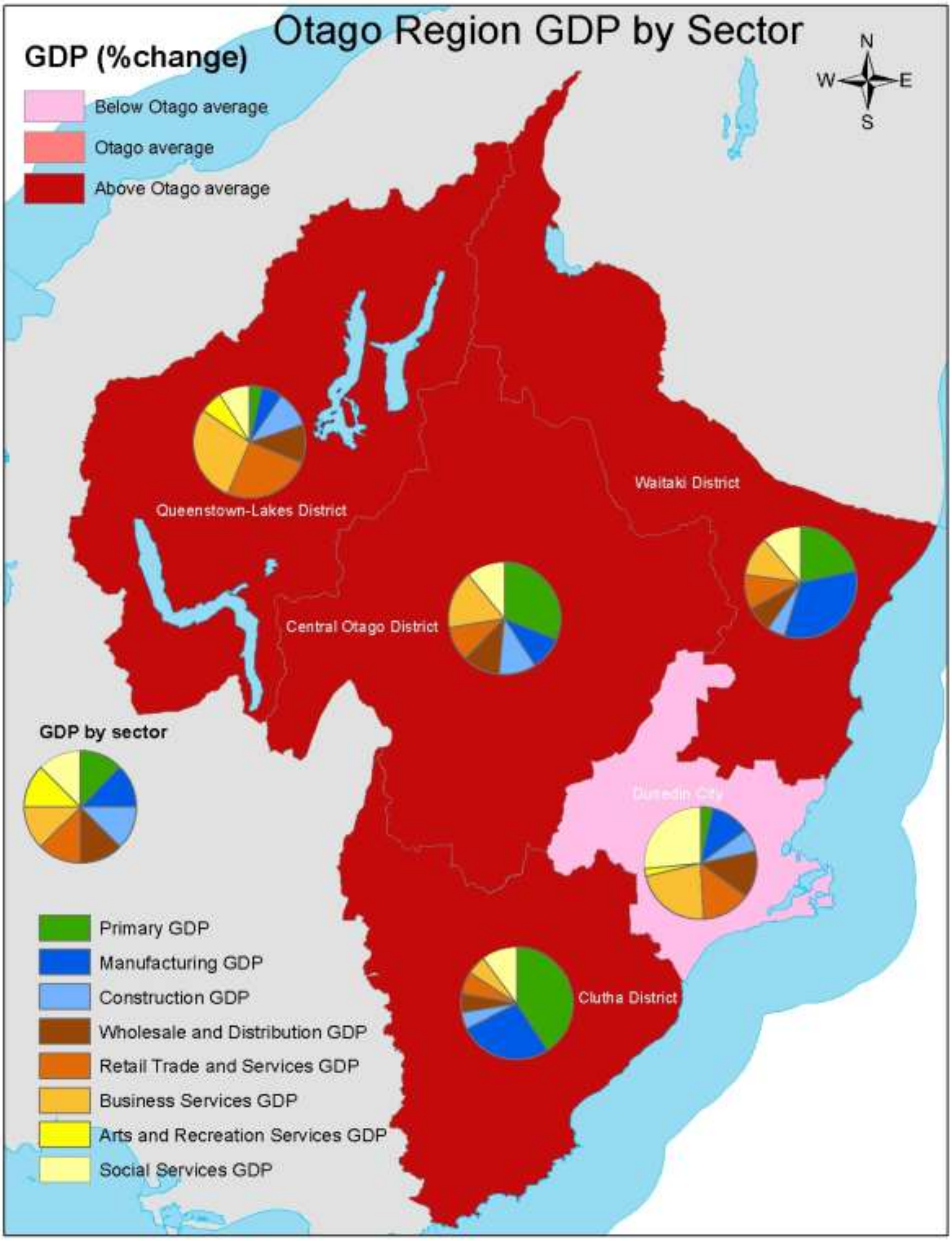
Source: BERL, Statistics NZ

Breaking down into industry level GDP, the industries with the GDP are those in the Agriculture, Food Product Manufacturing, and Professional Scientific and Technical Services (excluding Computer System Design and related) industries.

As shown in Summary Table 4, four districts in Otago Region had GDP growth rates above the Otago Region average; Dunedin City sat below the regional average. Figure 2.14 shows the relative GDP growth and make-up of the District's GDP by sector.

The Primary sector was the biggest contributor to GDP in the Central Otago and Clutha Districts. The Business Services sector had the biggest contribution to Dunedin City's economy. In the Queenstown-Lakes District, the prime movers of the economy were the Business Services and the Retail and Trade sectors. The Manufacturing sector was the biggest contributor to Waitaki District's GDP.

Figure 2.14 GDP by industry, Otago Region, 2012



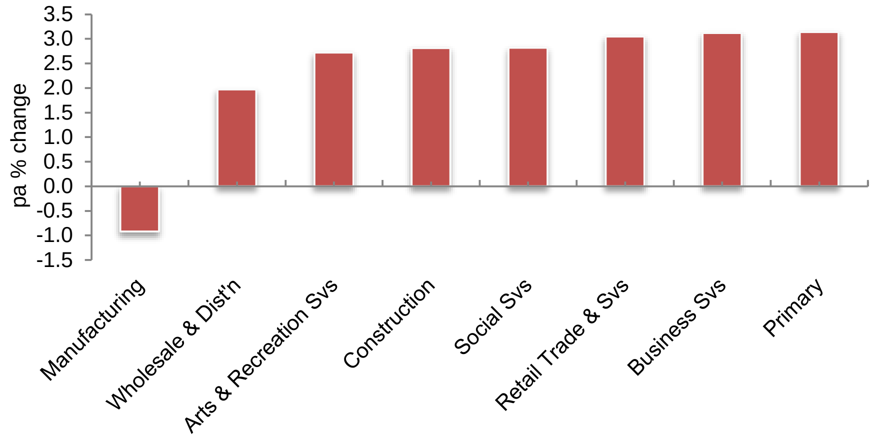
See section 8.4 (page 147) for a table of the figures used for the chart.

2.4.2 10-year horizon economic performance

Unlike its short-term economic performance, the Otago Region had performed relatively well, growing as fast as the national economy from 2002 to 2012. GDP grew at an average of 2.2 percent per annum over the period. GDP peaked in 2009 and then slowed down over the next two years peaking in 2012.

Figure 2.15 reports the average annual GDP growth of the eight key sectors over the last ten years.

Figure 2.15. GDP growth by sector, Otago Region, 2002-2012



Source: BERL Regional Database, 2012

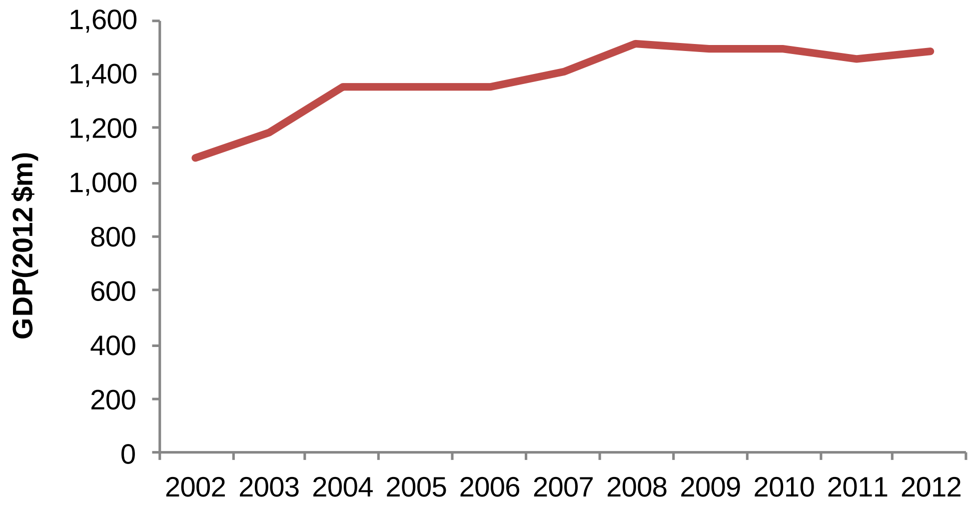
The Primary, Construction, and Business Services sectors have led the expansion of economic activity in the region. In contrast, the Manufacturing sector had declining GDP of 0.9 percent per annum over the same period.

Business Services sector

The Business Services sector's GDP was valued at about $1.5 billion in 2012, accounting for about 20 percent of the Otago Regional economy. From 2002 to 2012, the sector averaged per annum GDP growth of 3.1 percent

Figure 2.16 shows the GDP trend in the Business Services sector over the past decade.

Figure 2.16. Business Services sector GDP, Otago Region, 2002-2012



Source: BERL Regional Database, 2012

From 2002 to 2012, the Business Services sector has had strong GDP gains dropping only in 2011. Over this period, GDP has expanded at a rate faster than the average growth of the national Business Services sector. The leading contributors to the sector's GDP growth over the past 10 years were:

- Gas Supply (up 23.5 percent per annum)
- Rental and Hiring Services (up 7.1 percent per annum)
- Library and Other Information Services (up 7.0 percent)
- Electricity Supply (up 6.7 percent per annum)
- Waste Collection Treatment and Disposal Services (up 5.5 percent per annum).

The Business Services sector is also composed of contemporary businesses such as those in the Computer System Design and Related Services and Telecommunications Services industries. Although still small in terms of employment and GDP, these industries showed fast growth over the past 10 years. For example, the Computer System Design and Related Services had GDP growth at 4.9 percent per annum, while the Telecommunications Services industry grew 4.8 percent per annum between 2002 and 2012. These industries can potentially expand further as the 'new economy' will be continuously shaped by information and communication technologies.

In general, the Business Services sector, compared to the other key economic sectors of the Otago Region, had the strongest GDP growth over the 10-year horizon but with the same growth rate as the Primary sector.

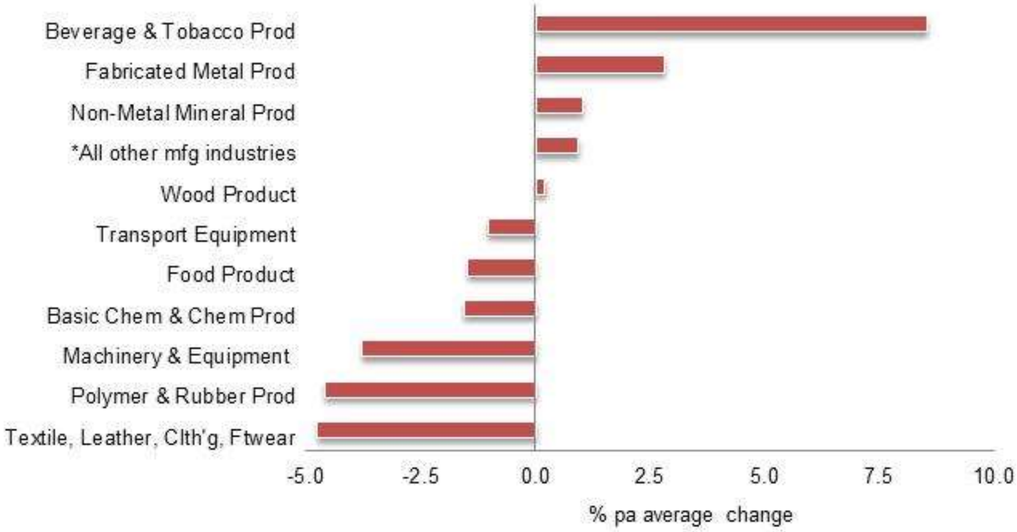
Manufacturing sector

The 10-year GDP performance of the Manufacturing sector reflects the impact of New Zealand's economic downturn in 2008, and the influence of the global financial crisis (GFC) and (to date) on-going high exchange rate and the impacts on New Zealand's international competitiveness. This has resulted in a sluggish economic recovery, and lukewarm business and consumer spending.

The Region's Manufacturing sector had negative average annual growth from 2002 to 2012, largely due to a contraction of food product manufacturing.

Figure 2.17 shows average annual GDP growth of the ten largest manufacturing industries in the Otago Region's Manufacturing sector; the remaining five industries in this sector are grouped under 'All other manufacturing' (each of these industries had GDP of less than $20 million in 2012).

Figure 2.17. GDP growth in the Manufacturing sector, Otago Region, 2002-2012



Source: BERL Regional Database, 2012

Six of the fifteen industries in the Manufacturing sector grew on average over the decade. Two of these were relatively small in GDP dollar terms and are grouped under 'All other manufacturing industries' and are not shown separately in the Figure above.[11] The Furniture and Other Manufacturing industry had GDP of $16.3 million in 2012, and although it contracted in the latest year, it grew by 3.0 percent per annum on average in the decade to 2012. The Petroleum and Coal Product Manufacturing industry had GDP of $16.5 million in 2012, growing substantially over the decade from an industry of $1-2 million in 2002.

The Food Product Manufacturing industry was the largest in the Region's Manufacturing sector, accounting for almost half of the sector's total GDP in 2012. But this industry's GDP contracted by 1.5 percent per annum on average over the decade.

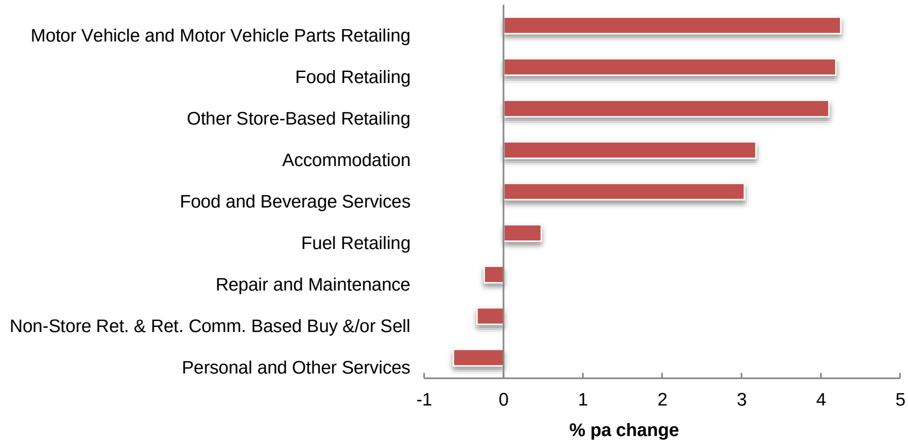
[11] The remaining three 'other' manufacturing industries, which contracted on average over the decade, were: Primary Metal and Metal Product Manufacturing; Pulp Paper and Converted Paper Product Manufacturing; and, Printing.

Retail Trade and Services sector

The Retail Trade and Services sector has over 4,100 business units, providing employment for close to 25,000 people, and adding $1.07 billion to regional GDP in 2012. Relative to other sectors, the Retail Trade and Services sector is more affected by the local economy and consumer confidence levels, as well as the volatility of the flow of visitors to the region.

Figure 2.18 summarises the movements in Otago Region's Retail Trade and Services sector. This Figure omits one industry in the Retail Trade and Services sector – Private Households Employing Staff – as it does not currently have any employment or output in the Otago Region.

Figure 2.18. GDP growth in the Retail Trade and Services sector, Otago Region, 2002-2012



Source: BERL Regional Database, 2012

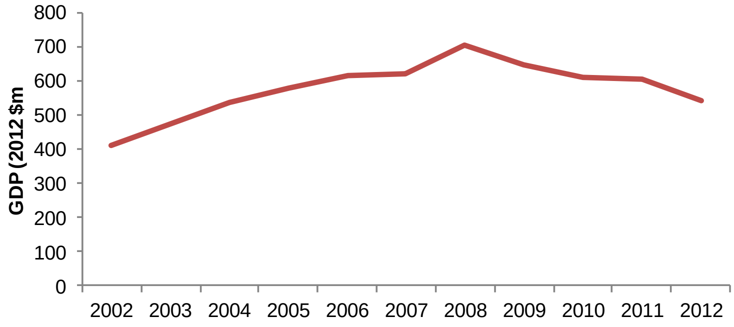
The largest annual increases in GDP over the 10-year horizon were in the Motor Vehicle and Motor Vehicle Parts Retailing; the Food Retailing; and the Other Store-Based Retailing industries. In terms of magnitude, the Vehicle and Motor Vehicle Parts Retailing industry's GDP growth was small, with GDP of $54 million in 2012, unlike the Food Retailing industries, which contributed GDP of $217 million.

Construction sector

The Construction sector contributed $542 million to the Otago Region's GDP. The sector's GDP peaked in 2008, largely a result of rural development and infrastructure. However, the national economy suffered a double dip recession and sluggish recovery. Despite concerted efforts focussed on urban and rural infrastructure development, the Construction sector has suffered setbacks in terms of both employment and its scale of operations.

Figure 2.19 shows the movements in the sector's GDP growth over the last ten years.

Figure 2.19. GDP in the Construction sector, Otago Region, 2002-2012



Source: BERL Regional Database, 2012

Overall, solid growth in the early 2000's compensated for GDP losses in the later years. The net annual increase in GDP is 4.2 percent over the decade.

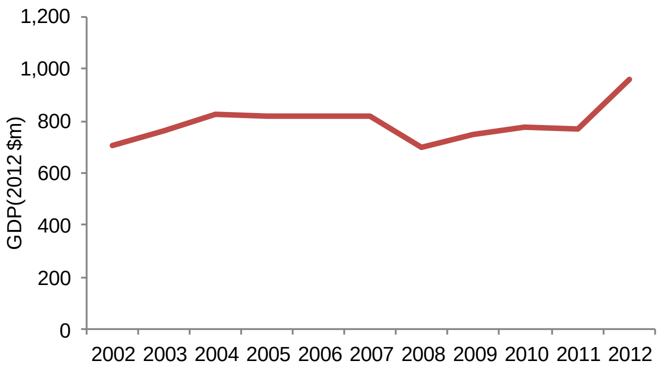
Primary sector

The Primary sector is a vital component of the regional economy. Over the decade, the sector managed to increase its employment and GDP, compensating for reductions in employment and GDP losses experienced in other sectors.

In 2012, the Primary sector contributed just over $956 million in GDP (12.5 percent of Otago Region's total GDP) to the regional economy. The leading contributors to Primary sector GDP were Agriculture ($616 million); Agriculture, Forestry and Fishing Support Services ($140 million); and Forestry and Logging ($120 million).

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

Figure 2.20. GDP in the Primary sector, Otago Region, 2002-2012



Source: BERL Regional Database, 2012

From 2002 to 2012, the Primary sector maintained a modest but steady increase in GDP (up 3.1 percent per annum). This growth is primarily accounted for by agricultural (mainly horticulture, viticulture, sheep/cattle farming and dairy activities) and metal ore mining-related activities. A notable contributor is the sheep/cattle farming and dairy activities in Waitaki district, as seen in Table 7.5 and on the increase in milk and milk products prices.

2.5 Labour productivity – Otago Region

Table 2.7 shows labour productivity across the eight sectors in the Otago Region between 2002 and 2012.

Table 2.7. Labour productivity summary, Otago Region, 2002 to 2012[12]

Sector	Productivity (2012$ per FTE)				%pa change		
	2002	2010	2011	2012	2011	2012	2002 to 2012
Primary	74,243	77,530	71,749	86,460	-7.5	20.5	1.5
Manufacturing	102,324	125,659	124,984	127,639	-0.5	2.1	2.2
Construction	67,715	60,986	64,438	59,493	5.7	-7.7	-1.3
Wholesale and Distribution	119,961	127,640	132,445	131,444	3.8	-0.8	0.9
Retail Trade and Services	42,294	50,454	50,240	51,882	-0.4	3.3	2.1
Business Services	104,045	112,204	109,109	110,642	-2.8	1.4	0.6
Arts and Recreation Services	74,397	66,706	69,896	67,792	4.8	-3.0	-0.9
Social Services	77,058	65,250	65,586	64,969	0.5	-0.9	-1.7
Otago Region	**78,361**	**80,440**	**79,268**	**81,156**	**-1.5**	**2.4**	**0.4**
New Zealand	**90,946**	**94,478**	**94,613**	**95,592**	**0.1**	**1.0**	**0.5**

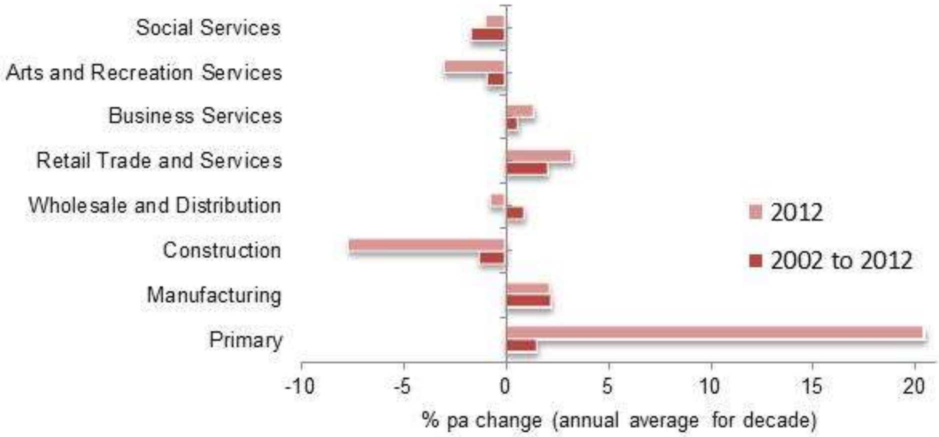
 # excl owner-occupied dwellings sector *Source: BERL Regional Database, 2012*

The Otago Region has an overall labour productivity of $81,156 per FTE. This level is about 18 percent lower than the national productivity per worker ($95,592 per FTE) in 2012. GDP per FTE in the Otago Region grew compared to 2011.

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

Figure 2.21 shows that the value of output per FTE increased in four of the eight sectors in 2012. This resulted in a net increase in labour productivity (up 2.4 percent from its value a year ago).

Figure 2.21. Change in labour productivity, Otago Region, 2012 and 2002-2012



Source: BERL Regional Database, 2012

The Primary sector had the highest productivity in 2012 whereas the Construction sector had the biggest decline in productivity. Although not shown in the Figure, sectors in which productivity declined in 2011 had increased productivity in 2012 and vice versa.

Over the longer term, labour productivity grew at 0.4 percent per annum on average between 2002 and 2012 in the Otago Region. This was similar to the national rate (0.5 percent per annum).

2.6 Business Units and size – Otago Region

2.6.1 Business Units

Table 2.8 provides the number of business units in the Otago Region broken down by sector from 2002 to 2012.

Table 2.8. Business Units summary, Otago Region, 2002 to 2012

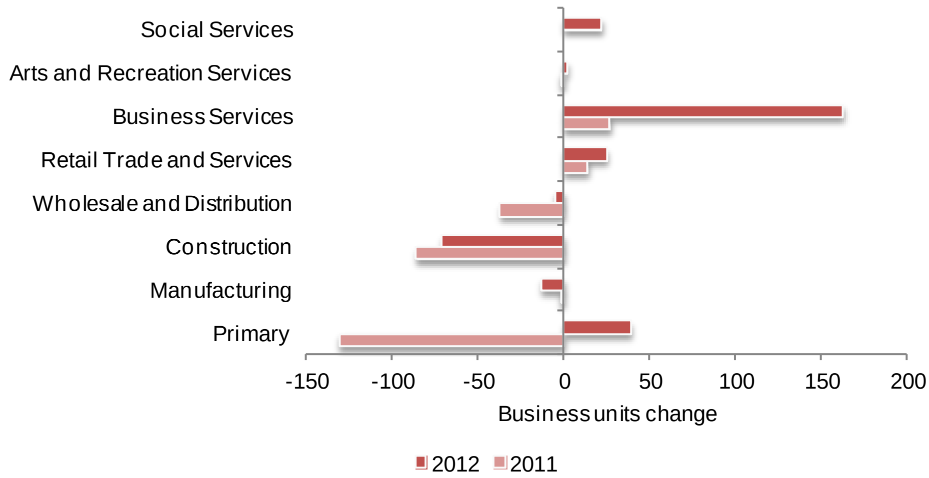
Sector	Business Units (number)				%pa change		
	2002	2010	2011	2012	2011	2012	2002 to 2012
Primary	5,285	4,900	4,769	4,808	-2.7	0.8	-0.9
Manufacturing	859	923	921	908	-0.2	-1.4	0.6
Construction	1,742	2,929	2,843	2,772	-2.9	-2.5	4.8
Wholesale and Distribution	1,415	1,534	1,497	1,492	-2.4	-0.3	0.5
Retail Trade and Services	3,562	4,126	4,140	4,165	0.3	0.6	1.6
Business Services	5,226	9,315	9,342	9,505	0.3	1.7	6.2
Arts and Recreation Services	537	665	663	665	-0.3	0.3	2.2
Social Services	1,475	1,777	1,777	1,799	0.0	1.2	2.0
Otago Region	**20,101**	**26,169**	**25,952**	**26,114**	**-0.8**	**0.6**	**2.7**
New Zealand	**410,961**	**508,236**	**505,194**	**504,381**	**-0.6**	**-0.2**	**2.1**

Source: BERL Regional Database, 2012

The business unit losses experienced in 2011 were halted in 2012. The increase in the number of business units was 162 businesses. The contributors to the growth in business units came from the Primary; the Retail Trade and Services; the Business Services; the Arts and Recreation Services; and the Social Services sectors. The 2012 number of business units operating in the Otago Region suggests that business activity has started to pick up. This year, the Primary and the Arts and Recreation Services sectors bounced back, with businesses up 39 units and 2 units, respectively.

Figure 2.22 shows the change in business units by sector in the Otago Region in 2011 and 2012.

Figure 2.22. Business unit change, Otago Region, 2011 and 2012



Source: BERL Regional Database, 2012

There were positive gains in the Primary (up 39 business units); Retail Trade and Services (up 25 business units); Business Services (up 163 business units); Arts and Recreation Services (up 2 business units); and Social Services (up 22 business units) sectors. These more than offset the reduction in business units in the Manufacturing (down 13 business units); Construction (down 71 business units); and Wholesale and Distribution (down 5 business units) sectors. Business units grew by 0.6 percent (net). This contrasts with a decline in business units in 2011 (-0.8 percent).

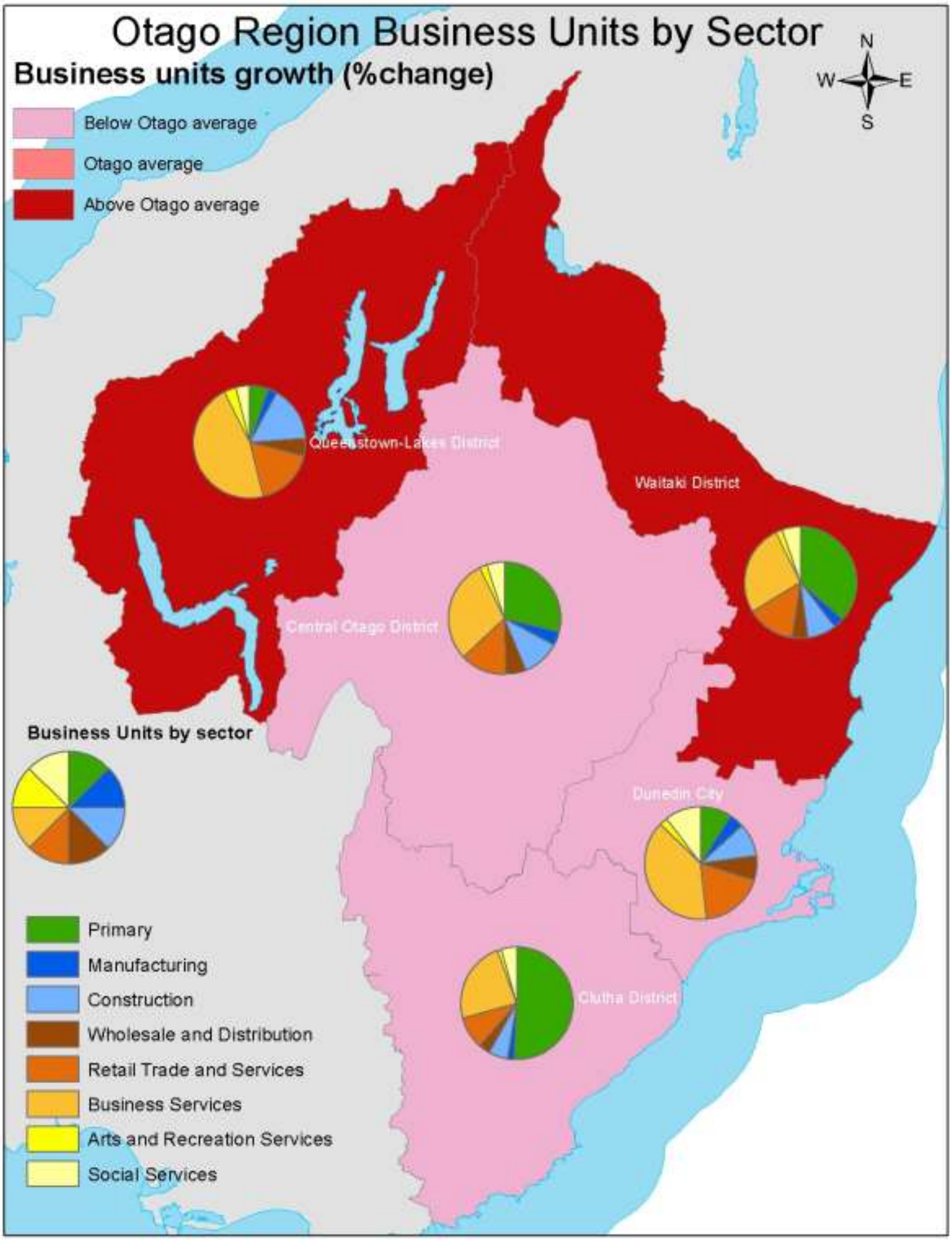
From 2002 to 2012, the number of business units in the Otago Region grew faster than the national average. The Business Services sector has the fastest per annum growth in business units, followed by the Construction sector. In contrast, the number of businesses in the Primary sector had on average decreased by one percent per annum, from 5,285 units in 2002 to 4,808 units in 2012. [13]

Figure 2.23 presents the Business Unit growth of the different districts in the Otago Region in comparison to the business unit growth of the region, as well as the proportion of the business units of the different sectors in the economy. More than half of the business units in Central Otago and Waitaki Districts were in the Business Services and Primary sectors. Half of the total Business Units

[13] Industries related to forestry and logging, and fishing, hunting and trapping have had declining business units over this period.

in Clutha were in the Primary sector, followed by the Business Services sector. In Dunedin City and the Queenstown-Lakes District, more than 50 percent of the total business units were in the Business Services, and Retail and Trade sectors.

Figure 2.23 Business units by industry, Otago Region, 2012



See section 8.4 (page 147) for a table of the figures used for the chart.

2.6.2 Business size

In terms of business size (the average number of FTEs per business), the Otago Region remains a composite of small to medium size business units. On average, the manufacturing and social services sectors have the most number of FTEs per business in 2012 (9.7 FTEs and 12.4 FTEs, respectively).

Table 2.9. Business size summary, Otago Region, 2002 to 2012

Sector	Business Size (FTEs per unit)				%pa change		
	2002	2010	2011	2012	2011	2012	2002 to 2012
Primary	1.8	2.0	2.2	2.3	9.7	2.5	2.5
Manufacturing	14.1	10.9	9.6	9.7	-12.3	1.6	-3.6
Construction	3.5	3.4	3.3	3.3	-3.4	-0.4	-0.6
Wholesale and Distribution	4.2	4.1	4.2	4.4	2.5	4.0	0.5
Retail Trade and Services	5.3	4.8	4.9	5.0	2.8	1.4	-0.6
Business Services	2.0	1.4	1.4	1.4	0.1	-1.0	-3.5
Arts and Recreation Services	3.3	3.7	3.7	3.8	-1.6	4.7	1.5
Social Services	9.6	12.2	12.7	12.4	3.6	-2.5	2.5
Otago Region	**3.9**	**3.6**	**3.6**	**3.6**	**1.1**	**0.1**	**-0.8**
New Zealand	**3.8**	**3.6**	**3.7**	**3.7**	**2.2**	**1.2**	**-0.3**

Source: BERL Regional Database, 2012

The reduction in business size reflects how businesses tend to restructure to adjust to current economic conditions. The sectors badly hit by the downturn tend to shed employees as they struggle to keep afloat during tough times. Over the last two years, average business size has fallen in the Construction sector. In spite of the Social Services sector having the highest business size, its growth declined by 2.5 percent in 2012.

Looking at the 10-year horizon, the average business size has fallen in the Manufacturing; Construction; Retail Trade and Services; and Business Services sectors.

2.7 Location Quotients – Otago Region

This section looks at the concentration of industries in the Otago Region compared to the national average. Location quotients are used to describe the local labour market's industry structure, relative to a larger base area. The analysis is at the 86-industry level. [14]

Generally, when the location quotient is larger than 1.0, it is means the local economy has a particularly high concentration of employment in that industry. This suggests the local economy has a comparative advantage in that industry, and is supplying other parts of the country. When the location quotient is less than 1.0, it means that the industry has a lower share in employment locally than nationally. It also suggests that the area is reliant on other parts of the country to provide goods or services to this industry, as the industry is under-represented locally.

[14] The location quotient is a ratio 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. 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. The wider the area being examined, the closer to 1.0 values are likely to be.

Table 2.10 shows the 10 industries with the highest location quotients.

Table 2.10. Ten industries with the highest FTE location quotients, Otago Region, 2012

Rank by FTE location quotient	Industry	Location Quotient
1	Metal Ore Mining	9.862
2	Accommodation	2.925
3	Other Transport	2.768
4	Tertiary Education	2.363
5	Heritage Activities	1.835
6	Publishing (except Internet and Music Publishing)	1.575
7	Social Assistance Services	1.531
8	Sport and Recreation Activities	1.493
9	Agriculture	1.476
10	Non-Metallic Mineral Mining and Quarrying	1.447

Source: BERL Regional Database, 2012

Metal Ore Mining has a concentration of 9.862 across the Otago Region as a whole. That means that, on average, workers in the Otago Region are almost 10 times more likely to be employed in Metal Ore Mining than in New Zealand as a whole. This employment is based almost exclusively in the Waitaki District, where Metal Ore Mining has a concentration of 89.85. The other major local employment areas are Accommodation, Other Transport, and Tertiary Education. Industries related to Accommodation, Other Transport, and Tertiary Education are more concentrated (and thus have a higher ratio) in Queenstown-Lakes District, as it is a major tourism destination in the Otago Region.

Table 2.11 shows the 10 industries with the lowest location quotients in the Otago Region. While these industries have some representation in the region, workers in these industries are more likely to work nationally than in the Otago Region.

Table 2.11. Ten industries with the lowest location quotients, Otago Region, 2012

Rank by FTE location quotient	Industry	Location Quotient
85	Oil and Gas Extraction	0.000
84	Defence	0.038
83	Water Transport	0.123
82	Exploration and Other Mining Support Services	0.150
81	Telecommunications Services	0.153
80	Coal Mining	0.191
79	Pulp Paper and Converted Paper Product Manufacturing	0.199
78	Insurance and Superannuation Funds	0.211
77	Internet Service Providers Web Search Portals and Data Processing Services	0.235
76	Polymer Product and Rubber Product Manufacturing	0.237

Source: BERL Regional Database, 2012

2.8 Key Sectors

This section presents the recent and longer-term contribution of employment, GDP and Business Units in the six key sectors in the Otago Region economy.

Table 2.12. Key sectors, Employment summary, Otago Region, 2002 - 2012

Key sectors employment (FTEs)	Year ending March				% pa change	
	2002	2010	2011	2012	2011 to 2012	2002 to 2012
Primary production	9,478	10,044	10,727	11,083	3.3	1.6
Primary processing	7,263	6,336	5,067	5,254	3.7	-3.2
Creative	2,248	2,045	2,069	2,022	-2.3	-1.1
Education and research	5,432	9,339	9,370	8,916	-4.8	5.1
Engineering, machinery and equipment manufacturing	969	1,136	1,124	1,186	5.5	2.0
Key sectors (excluding Tourism)	**25,391**	**28,900**	**28,357**	**28,461**	***0.4***	***1.1***
Non-key sectors	**53,525**	**64,826**	**65,585**	**66,145**	***0.9***	***2.1***
Total employment: Otago Region	**78,916**	**93,726**	**93,942**	**94,606**	***0.7***	***1.8***
Tourism sector	6,983	8,954	9,419	10,134	***7.6***	***3.8***

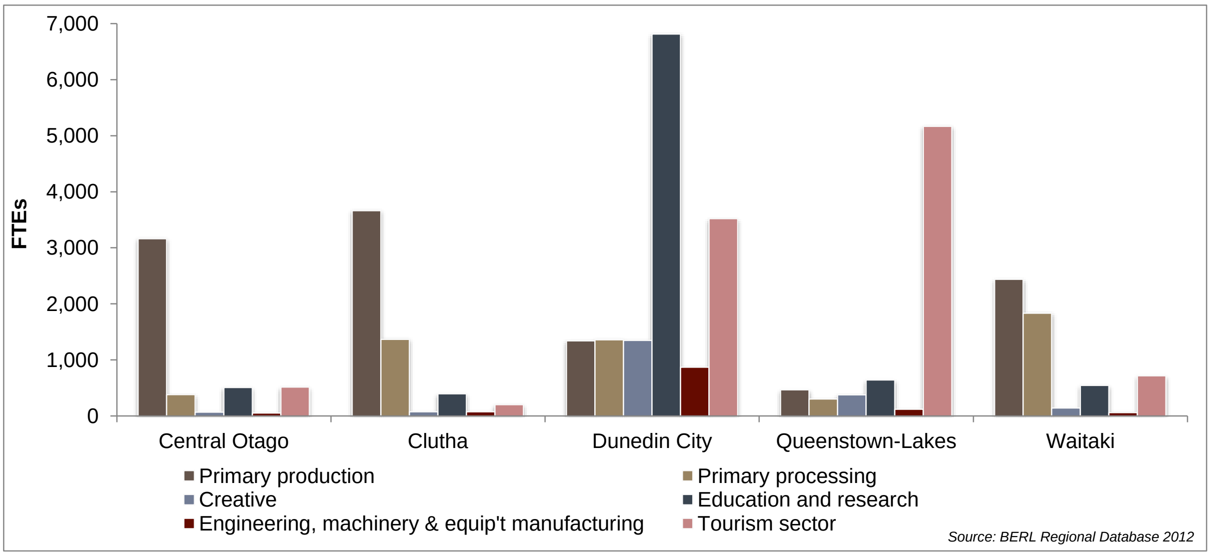
Source: BERL Regional Database 2012

- The top three leading contributors to employment in the Otago Region are the Primary Production, Tourism, and Education and Research sectors.
- Tourism-related industries provide a solid employment base for the region, employing more than 10,000 FTEs across the Otago Region.
- Overall, key sector employment in the Otago Region grew modestly between 2002 and 2012. The Primary Production, Education and Research and Engineering, Machinery and Equipment Manufacturing; and the Tourism sectors have experienced solid growth over the past ten years. However, the Creative and Primary Processing sectors saw declines in employment during the past decade.
- Much of the contraction in the Education and Research sector occurred over the latest two years, where employment declined by 454 FTEs.

Including Tourism as a key sector, the six key sectors employ about 41 percent of the Otago Region's FTEs. Education and Research, Tourism, and Primary Production are the largest sectors and are of a relatively similar size, each accounting for around 10 percent of employment in the Otago Region.

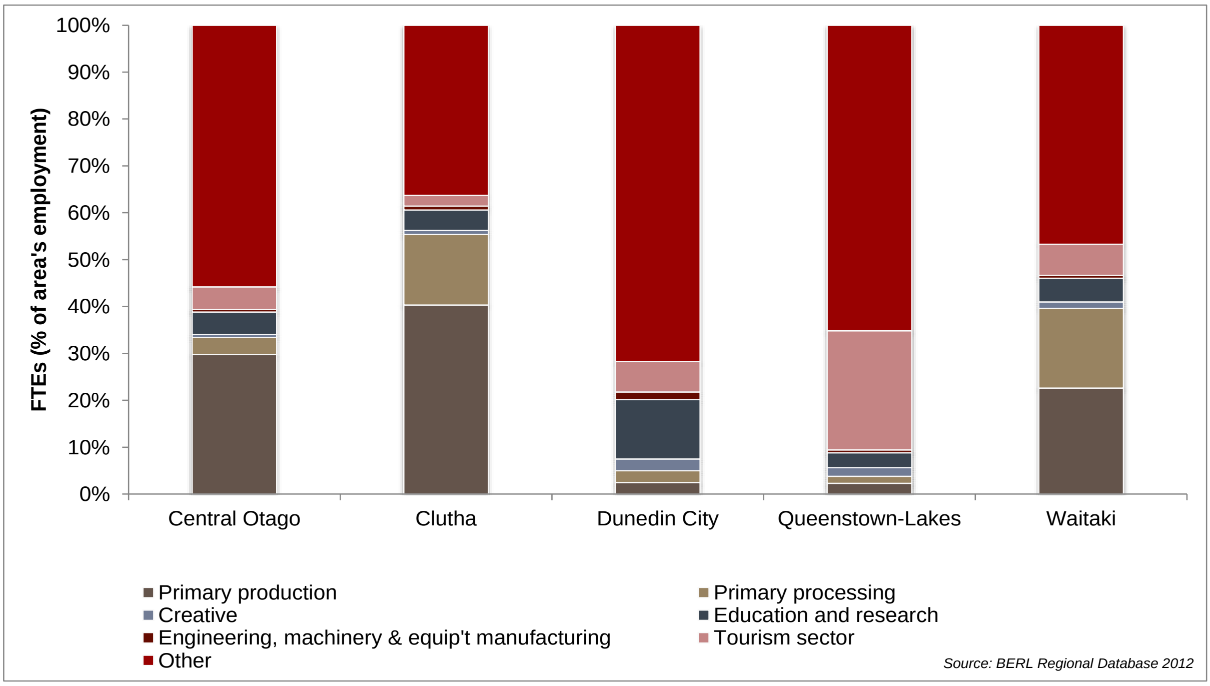
However, as Figure 2.24 shows, the key sectors have different levels of relevance in each of the local economies. For example, the Education and Research, and Creative sectors are the major employers in Dunedin City; Tourism is the most relevant sector in the Queenstown-Lakes District; Primary Production is the largest employer in the Central Otago and Clutha Districts; and Primary Processing is the largest employer in the Waitaki District.

Figure 2.24. Employment by local authority by key sectors, 2012



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

Figure 2.25. Percent employment by sector by local authority, 2012[15]



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

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[15] Note that we have included Tourism into the graphic to provide an indication of its relative contribution to employment compared to the other key sectors. Note that adding Tourism in– given the total sums to 100 percent – will therefore slightly understate the percentage share of employment by sector (as tourism employment is counted the other sectors – see footnote 7 on page 1 for further explanation).

Table 2.13 presents the recent and longer-term contribution of the six key sectors to regional GDP.

Table 2.13. Key sectors, GDP summary, Otago Region, 2002 - 2012

Key sectors GDP (2012$m)	Year ending March				%pa change	
	2002	2010	2011	2012	2011 to 2012	2002 to 2012
Primary production	704	779	770	958	24.5	3.1
Primary processing	794	867	695	734	5.6	-0.8
Creative	84	69	69	74	7.7	-1.3
Education and research	374	479	479	459	-4.2	2.1
Engineering, machinery and equipment manufactur	87	101	105	114	8.5	2.7
Key sectors (excluding Tourism)	**2,043**	**2,295**	**2,118**	**2,339**	***10.5***	***1.4***
Non-key sectors	**5,184**	**6,524**	**6,614**	**6,641**	***0.4***	***2.5***
Total GDP: Otago Region	**7,227**	**8,819**	**8,732**	**8,980**	***2.8***	***2.2***
Tourism sector	348	511	540	577	***6.9***	***5.2***

Source: BERL Regional Database 2012

- Key sector GDP increased to $2.34 billion from $2.12 billion in 2011.[16] The decline in the Education and Research sector was offset by growth in all other key sectors.
- The Primary Production and Engineering, Machinery and Equipment Manufacturing sectors had the two highest GDP growths in 2012. These sectors buoyed the regional economy, partially offsetting GDP losses in the other key sectors.

Table 2.14 presents the recent and longer-term contribution of the six key sectors to business unit growth in the Otago Region.

Table 2.14. Key sectors, Business Units summary, Otago Region, 2002 - 2012

Key sectors business units	Year ending March				% pa change	
	2002	2010	2011	2012	2011 to 2012	2002 to 2012
Primary production	5,285	4,900	4,769	4,808	0.8	-0.9
Primary processing	267	290	289	293	1.4	0.9
Creative	84	69	69	74	7.7	-1.3
Education and research	478	570	560	569	1.6	1.8
Engineering, machinery and equipment manufacturing	237	317	322	333	3.4	3.5
Key sectors (excluding Tourism)	**6,351**	**6,146**	**6,009**	**6,077**	***1.1***	***-0.4***
Non-key sectors	**13,750**	**20,023**	**19,943**	**20,037**	***0.5***	***3.8***
Total business units: Otago Region	**20,101**	**26,169**	**25,952**	**26,114**	***0.6***	***2.7***
Tourism sector	1,276	1,798	1,816	1,897	***4.4***	***4.0***

Source: BERL Regional Database 2012

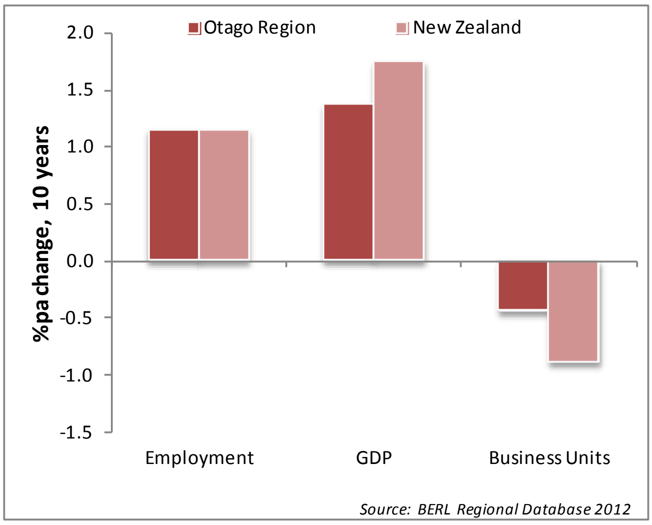
- The number of Business Units in all key sectors increased in 2012 by 68 Business units (excluding the Tourism sector). The largest absolute increase occurred in the Primary Production sector (39 Business Units).

[16] Tourism sector GDP cannot be added to the total GDP, as it is a composite of other sectors, including the key sectors.

- Business Units in tourism related industries expanded in 2012, adding 81 Business Units in the region; and a further 11 Business Units were added in the Engineering, Machinery & Equipment Manufacturing sector.
- Over the last 10 years, the Otago Region had seen a net decrease in Business Units, about 274 Business Units across the five key sectors (excluding Tourism).[17]

Figure 2.26 shows the average annual change in employment, GDP, and Business Units in the five key sectors (excluding the Tourism sector) in the Otago Region and at a national level since 2002.

Figure 2.26. Key sector indicator growth, Otago Region vs. New Zealand, 2002 - 2012



The key sectors in the Otago Region have lagged national performance in GDP but the same over the last ten years. However, Business units have declined at a slower rate than nationally.

The performance of the six key sectors (that is, including the Tourism sector) in terms of GDP, employment and business units is presented in the following sections.

2.8.1 Tourism sector

Analysis of the Tourism sector[18] identifies activity based on three industry groupings:

- Tourism characteristic industries
- Tourism related industries
- Non tourism related industries.

[17] Number excludes Tourism Sector Business Units.

[18] The Tourism sector is not classified as a distinct sector in the ANZSIC system. Instead, tourism-related activity is recorded across a range of industries, which we group into a tourism sector for this report. Caveat: to avoid double counting, tourism activity cannot be directly added to other industry figures from which the tourism sector figures are derived.

Tourism contributes to the local economy through activity in tourism characteristic industries such as accommodation, restaurants, transport services, and cultural and recreational services and tourism-related industries, specifically retail trade. Further, the benefits of tourism can also accrue to all other industries in the local economy.

The contribution to employment, GDP, and business units from tourism activity across these three groupings is calculated using proportions based on national ratios from the Tourism Satellite Account (TSA).[19]

Table 2.15 presents the 2012 contribution of the tourism sector to the Otago Regional economy. The percentage figures show the relative contribution to the Region's economy, except for the last row (New Zealand) which shows the contribution of the tourism sector to the national economy.

Table 2.15. Tourism Key Indicators, Otago Region, 2012

Role of tourism in local economy	Employment	%	GDP ($2012m)	%	Number of Business Units	%
Tourism-characteristic industries	8,065	*8.5%*	418.1	*4.6%*	1,399	*5.4%*
Tourism-related industries	1,331	*1.4%*	95.2	*1.1%*	257	*1.0%*
All non-tourism-related industries	738	*0.8%*	63.6	*0.7%*	242	*0.9%*
Otago Region	**10,134**	***10.7%***	**576.9**	***6.4%***	**1,897**	***7.3%***
New Zealand	**102,453**	***5.5%***	**7,458.5**	***3.6%***	**20,739**	***4.1%***

206,546 *urce: BERL Regional Database 2012*

In 2012, the tourism sector accounts for 10.7 percent of employment, 6.4 percent of GDP and 7.3 percent of business units in the Otago Region. These proportions are higher than nationally.

Table 2.16. Tourism Employment, Otago Region, 2002 - 2012

Tourism Employment (FTEs)	Years ending March				%pa change	
	2002	2010	2011	2012	2011 to 2012	2002 to 2012
Tourism-characteristic industries	5,399	6,995	7,398	8,065	9.0	4.1
Tourism-related industries	1,120	1,260	1,313	1,331	1.4	1.7
All non-tourism-related industries	463	699	708	738	4.3	4.8
Tourism Sector	**6,983**	**8,954**	**9,419**	**10,134**	**7.6**	**3.8**
Total Employment: Otago Region	**78,916**	**93,726**	**93,942**	**94,606**	**0.7**	**1.8**

Source: BERL Regional Database 2012

- Tourism employment in the region has grown faster than other sectors in the Otago Region over the last ten years (at 3.8 percent per annum on average).
- In 2012, employment in the Tourism sector grew by 7.6 percent, well above the 0.7 percent per annum employment growth in the Otago Region as a whole.

[19] 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 2.17 presents the recent and longer-term contribution of tourism GDP to the Otago Region economy.

Table 2.17. Tourism GDP, Otago Region, 2002 - 2012

Tourism GDP (2012$m)	Years ending March				%pa change	
	2002	2010	2011	2012	2011 to 2012	2002 to 2012
Tourism-characteristic industries	257	364	390	418	7.3	5.0
Tourism-related industries	51	85	88	95	8.5	6.5
All non-tourism-related industries	40	63	62	64	2.3	4.7
Tourism Sector	**348**	**511**	**540**	**577**	**6.9**	**5.2**
Total GDP: Otago Region	**7,227**	**8,819**	**8,732**	**8,980**	**2.8**	**2.2**

Source: BERL Regional Database 2012

- Tourism directly contributes over half a billion dollars to the Otago Region's GDP, or about six percent of the total GDP.
- Tourism GDP growth was impressive compared to overall GDP growth in the region in the latest year, and over the last decade. It has grown rapidly since 2002, up 5.2 percent a year. This is two times higher than the growth rate of the Otago Region's average GDP growth of 2.2 percent a year.

Table 2.18 presents the recent and longer-term contribution of tourism Business Units to the Otago Region economy.

Table 2.18. Tourism Business Units, Otago Region, 2002 - 2012

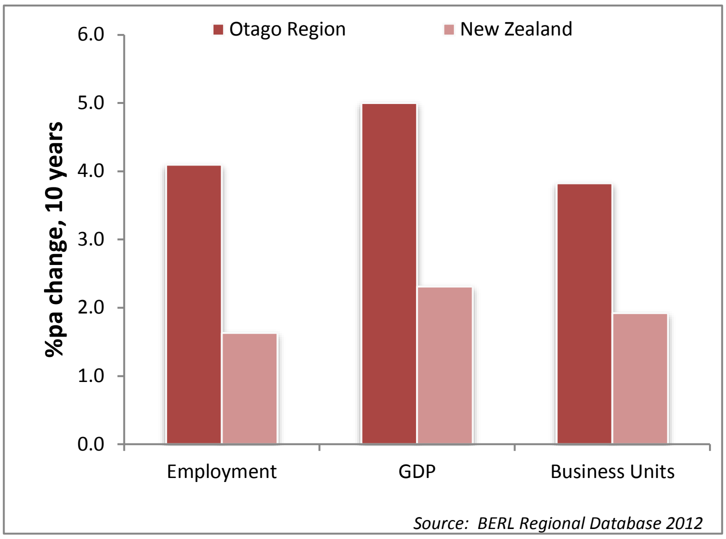
Tourism Business units	Years ending March				%pa change	
	2002	2010	2011	2012	2011 to 2012	2002 to 2012
Tourism-characteristic industries	961	1,323	1,331	1,399	5.1	3.8
Tourism-related industries	174	245	253	257	1.5	4.0
All non-tourism-related industries	141	230	232	242	4.1	5.5
Tourism Sector	**1,276**	**1,798**	**1,816**	**1,897**	**4.4**	**4.0**
Total Business Units: Otago Region	**20,101**	**26,169**	**25,952**	**26,114**	**0.6**	**2.7**

Source: BERL Regional Database 2012

- The number of businesses directly attributable to tourism has risen by 621 units since 2002, an average growth rate of four percent a year.

Figure 2.27 shows the change in employment, GDP, and Business Units in the tourism sector for the Otago Region and at a national level since 2002.

Figure 2.27. Tourism sector key indicator growth, Otago Region vs. New Zealand, 2002 - 2012



- Over the last ten years, the tourism sector in the Otago Region has enjoyed higher growth than the national average for all three indicators. As shown later in this report, this growth has been led by the Queenstown-Lakes District and Dunedin City.

2.8.2 Primary Production sector[20]

Table 2.19 presents the recent and longer-term contribution of Primary Production employment to the Otago Region's economy.

Table 2.19. Primary Production sector Employment, Otago Region, 2002 - 2012

Primary production sector Employment (FTEs)	Year ending March				%pa change	
	2002	2010	2011	2012	*2011 to 2012*	*2002 to 2012*
Agriculture	7,450	7,422	7,982	8,228	*3.1*	*1.0*
Aquaculture	6	0	10	10	*0.8*	*4.5*
Services to Agriculture; Hunting and Trapping	1,445	1,732	1,766	1,908	*8.0*	*2.8*
Forestry and Logging	260	221	258	240	*-6.9*	*-0.8*
Mining and services to mining	317	669	711	697	*-1.9*	*8.2*
Primary production sector	**9,478**	**10,044**	**10,727**	**11,083**	***3.3***	***1.6***
Total employment: Otago Region	**78,916**	**93,726**	**93,942**	**94,606**	***0.7***	***1.8***

Source: BERL Regional Database 2012

- Agriculture is the largest industry, accounting for close to 74 percent of total employment in the sector. This is followed by Services to Agriculture; Hunting and Trapping, with a further 17 percent.

[20] The Primary Production sector is based on the standard ANZSIC 2006 definitions. It broadly includes agriculture, forestry, fishing, and mining. Because of its small size, we have not commented on the changes in the Aquaculture industry.

- Otago Region gained 356 FTEs from activities related to the Primary Production sector in 2012.
- Over the last decade, employment growth in the Primary Production sector (at 1.6 percent per annum) was lower than total employment growth in the Otago Region (1.8 percent per annum).
- In 2012, Services to Agriculture; Hunting and Trapping had the fastest growth, increasing employment by 8.0 percent. However, over the last ten years, this industry has only grown at an average of 2.8 percent per annum.
- Over the last decade, the fastest growth has come from the Mining and Services to Mining industry (8.2 percent per annum).

Table 2.20 presents the recent and longer-term contribution of Primary Production sector GDP to the Otago Region economy.

Table 2.20. Primary Production sector GDP, Otago Region, 2002 - 2012

Primary production sector GDP (2012$m)	Year ending March				%pa change	
	2002	2010	2011	2012	2011 to 2012	2002 to 2012
Agriculture	441	482	455	618	*35.7*	*3.4*
Aquaculture	4	0	6	7	*7.4*	*6.2*
Services to Agriculture; Hunting and Trapping	107	128	120	167	*38.6*	*4.6*
Forestry and Logging	86	108	126	120	*-5.1*	*3.4*
Mining and services to mining	67	61	62	47	*-23.1*	*-3.4*
Primary production sector	**704**	**779**	**770**	**958**	***24.5***	***3.1***
Total GDP: Otago Region	**7,227**	**8,819**	**8,732**	**8,980**	***2.8***	***2.2***

Source: BERL Regional Database 2012

- Primary Production GDP was up 24.5 percent in the year to March 2012, led by Services to Agriculture; Hunting and Trapping, and Agriculture.
- Long-term, GDP in the sector has averaged annual growth of 3.1 percent a year since 2002, above the Otago Region's total GDP growth rate of 2.2 percent per annum.

Table 2.21 presents the recent and longer-term change in the Primary Production sector's Business units in the Otago Region economy.

Table 2.21. Primary Production sector Business Units, Otago Region, 2002 - 2012

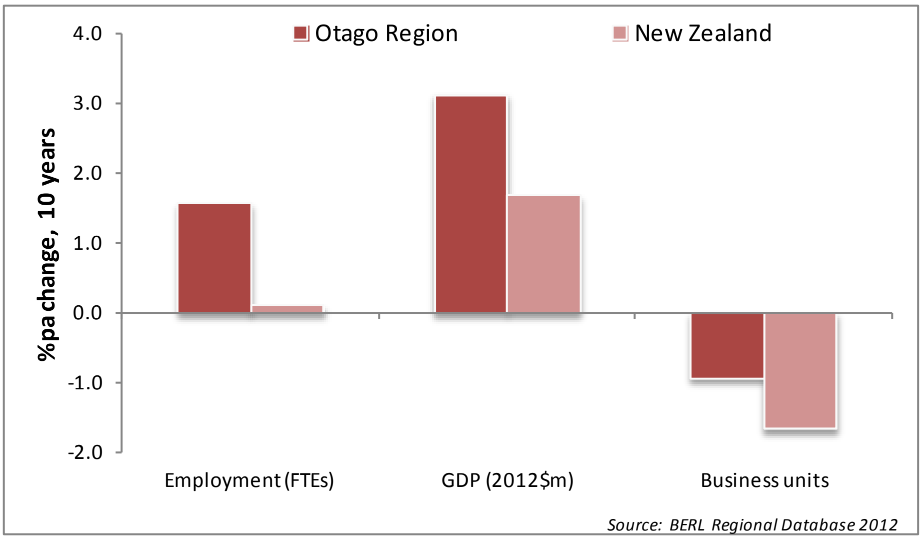
Primary production sector Business units	Year ending March				%pa change	
	2002	2010	2011	2012	2011 to 2012	2002 to 2012
Agriculture	4,376	3,951	3,847	3,867	*0.5*	*-1.2*
Aquaculture	6	5	6	8	*33.3*	*2.9*
Services to Agriculture; Hunting and Trapping	480	533	499	523	*4.8*	*0.9*
Forestry and Logging	387	367	372	361	*-3.0*	*-0.7*
Mining and services to mining	36	44	45	49	*8.9*	*3.1*
Primary production sector	**5,285**	**4,900**	**4,769**	**4,808**	**0.8**	***-0.9***
Total business units: Otago Region	**20,101**	**26,169**	**25,952**	**26,114**	**0.6**	***2.7***

Source: BERL Regional Database 2012

- Business units in the sector continue to consolidate, following national trends. The number of Business units in the Primary Production sector has declined since 2002. The largest decline has been in the Agriculture industry, which has 509 less Business Units than a decade ago.
- The Services to Agriculture; Hunting and Trapping industry added 43 additional Business Units over the decade.

Figure 2.28 shows the change in employment, GDP, and Business Units in the Primary Production sector in Otago Region and at a national level since 2002.

Figure 2.28. Primary Production sector key indicator growth, Otago Region vs. New Zealand, 2002 - 2012



- The Primary Production sector in the Otago Region is has grown strongly relative to the sector nationally.
- The Primary Production sector outperformed New Zealand in terms of employment and GDP over the 10-year horizon. While business size has declined, it has been at a slower rate than nationally.

2.8.3 Primary Processing sector[21]

Table 2.22 shows the recent and longer-term contribution of Primary Processing sector employment to the Otago Region economy.

Table 2.22. Primary Processing sector Employment, Otago Region, 2002 - 2012

Primary processing sector Employment (FTEs)	Year ending March				%pa change	
	2002	2010	2011	2012	2011 to 2012	2002 to 2012
Food, Beverage and Tobacco	6,190	5,574	4,300	4,488	*4.4*	*-3.2*
Wood and Paper Product Manufacturing	1,073	763	767	767	*0.0*	*-3.3*
Primary processing sector	**7,263**	**6,336**	**5,067**	**5,254**	***3.7***	***-3.2***
Total employment: Otago Region	**78,916**	**93,726**	**93,942**	**94,606**	***0.7***	***1.8***

Source: BERL Regional Database 2012

- The Primary Processing sector contributes about 5,260 FTEs, around 5.6 percent of total employment in the Otago Region.
- The Food, Beverage and Tobacco industry gained 188 FTEs in 2012 but lost 1,702 FTEs in the decade.
- Employment growth is also flat in the Wood and Paper Product Manufacturing industry, which employed 767 people in 2012. Over the past 10 years, the number of people working in this industry has been decreasing by 31 FTEs (3.3 percent) per annum.
- Since 2002, employment in the Primary Processing sector has declined at 3.3 percent (201 FTEs) per year over the last 10 years compared to 1.8 percent growth in overall employment in the Otago Region.

Table 2.23 presents the recent and longer-term contribution of the Primary Processing sector to GDP in the Otago Region.

Table 2.23. Primary Processing sector GDP, Otago Region, 2002 - 2012

Primary processing sector GDP (2012$m)	Year ending March				%pa change	
	2002	2010	2011	2012	2011 to 2012	2002 to 2012
Food, Beverage and Tobacco	658	739	566	600	*6.0*	*-0.9*
Wood and Paper Product Manufacturing	136	129	130	135	*3.8*	*-0.1*
Primary processing sector	**794**	**867**	**695**	**734**	***5.6***	***-0.8***
Total GDP: Otago Region	**7,227**	**8,819**	**8,732**	**8,980**	***2.8***	***2.2***

Source: BERL Regional Database 2012

- In 2012, the Primary Processing sector contributed $734 million to the Otago Region GDP, around 8.2 percent of total regional GDP. This contribution to GDP total was an increase from 2011 where the sector contributed eight percent of regional GDP.
- Over the past 10 years, the sector's GDP has fallen by 0.8 percent per annum. The majority of this decline is occurring in the Food, Beverage and Tobacco industries.

[21] The Primary processing sector includes the food and beverage, and the wood and paper product manufacturing industries.

Table 2.24 presents the recent and longer-term contribution of Primary Processing sector's business units to the Otago Region economy.

Table 2.24. Primary Processing sector Business Units, Otago Region, 2002 - 2012

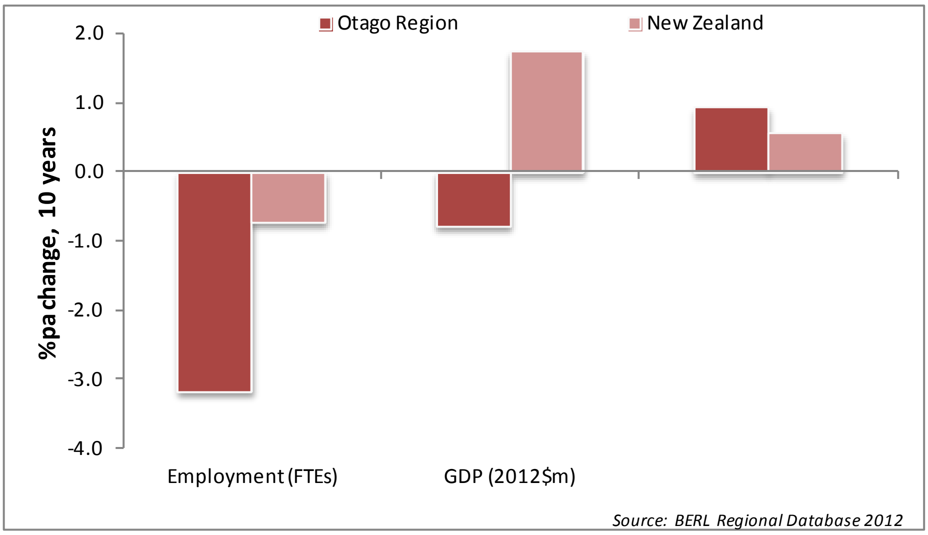
Primary processing sector Business units	Year ending March				%pa change	
	2002	2010	2011	2012	*2011 to 2012*	*2002 to 2012*
Food, Beverage and Tobacco	151	174	177	182	*2.8*	*1.9*
Wood and Paper Product Manufacturing	116	116	112	111	*-0.9*	*-0.4*
Primary processing sector	**267**	**290**	**289**	**293**	***1.4***	***0.9***
Total business units: Otago Region	**20,101**	**26,169**	**25,952**	**26,114**	***0.6***	***2.7***

Source: BERL Regional Database 2012

- The number of business units engaged in Primary Processing remained relatively flat in the last year, rising by 4 to 293 Business Units in 2012.
- From 2002 to 2012, the number of business units has slightly increased by 26, which came from the Food, Beverage and Tobacco industry.

Figure 2.29 shows the change in employment, GDP and business units in the Primary Processing sector in the Otago Region and at a national level since 2002.

Figure 2.29. Primary Processing sector key indicator growth, Otago Region vs. New Zealand, 2002 - 2012



- The Primary Processing sector has not performed as well as nationally in relation to employment and GDP.
- Employment and GDP in the Primary Processing sector had declined over the past 10 years despite increasing number of business units in the sector.

2.8.4 Creative sector[22]

Table 2.25 presents the recent and longer-term contribution of Creative sector employment to the Otago Region's economy.

Table 2.25. Creative sector Employment, Otago Region, 2002 - 2012[23]

Creative sector Employment (FTEs)	Year ending March				%pa change	
	2002	2010	2011	2012	2011 to 2012	2002 to 2012
Printing and publishing	1,313	1,146	1,193	1,113	-6.8	-1.6
Arts and antiques market	95	71	63	64	1.8	-3.9
Commercial services	245	335	348	364	4.7	4.1
Film, video and television services	373	331	325	323	-0.7	-1.4
Music, creative and performing arts and venues	223	162	140	158	13.0	-3.4
Creative sector	**2,248**	**2,045**	**2,069**	**2,022**	**-2.3**	**-1.1**
Total employment: Otago region	**78,916**	**93,726**	**93,942**	**94,606**	**0.7**	**1.8**

Source: BERL Regional Database 2012

- The Printing and Publishing industry is the largest employer in the Creative sector, employing 1,113 FTEs in the region (down 200 FTEs from 2011), which led to a decline in employment growth in the Creative sector. The Music, Creative and Performing Arts and Venues; Commercial Services; and Arts and Antiques Market were the industries with positive employment growth in the year to 2012 but this could not offset the decrease in the FTE growth for the Creative sector.[24].
- In 2012, Printing and Publishing and Film, Video and Television Services combined lost 82 FTEs.
- From 2002 to 2012, the employment in the Creative sector has fallen by 1.1 percent per annum. The fastest decline has been in the Arts and Antiques Market, where employment has fallen by 3.9 percent per annum over the last decade. Commercial Services, however, has increased employment by 4.1 percent per annum over the same period.

[22] The Creative sector is composed of the Printing and Publishing; Arts and Antiques Market; Commercial Services; Film, Video and Television Services; and Music, Creative and Performing Arts and Venues industries. The list of industries in the Creative sector is based from the ANZSIC 2006. The sub-industries under five broad industries are included in the Appendices.

[23] 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 for Otago region.

[24] This sector includes business engaged in architectural, advertising and other specialised design services.

Table 2.26 presents the recent and longer-term contribution of Creative sector GDP to the Otago Regional economy

Table 2.26. Creative sector GDP, Otago Region, 2002 - 2012

Creative sector GDP (2012$ m)	Year ending March				%pa change	
	2002	2010	2011	2012	*2011 to 2012*	*2002 to 2012*
Printing and publishing	19	16	15	17	*9.0*	*-1.4*
Arts and antiques market	4	5	4	5	*8.9*	*0.6*
Commercial services	14	14	15	18	*17.0*	*2.4*
Film, video and television services	29	23	23	23	*-2.9*	*-2.4*
Music, creative and performing arts and venues	17	11	10	12	*15.3*	*-3.8*
Creative sector	**84**	**69**	**69**	**74**	***7.7***	***-1.3***
Total GDP: Otago region	**7,227**	**8,819**	**8,732**	**8,980**	***2.8***	***2.2***

Source: BERL Regional Database 2012

- The Creative sector contributed $74 million (up $5 million from 2011) to regional GDP in 2012.
- Over the last 10 years, the Arts and Antiques Market, and Commercial Services sectors had a positive annual contribution to regional GDP. However, the Creative sector's GDP declined by 1.3 percent per annum over the last ten years.

Table 2.27 presents the recent and longer-term contribution of business units in the Creative sector to the Otago Region economy.

Table 2.27. Creative sector Business Units, Otago Region, 2002 - 2012

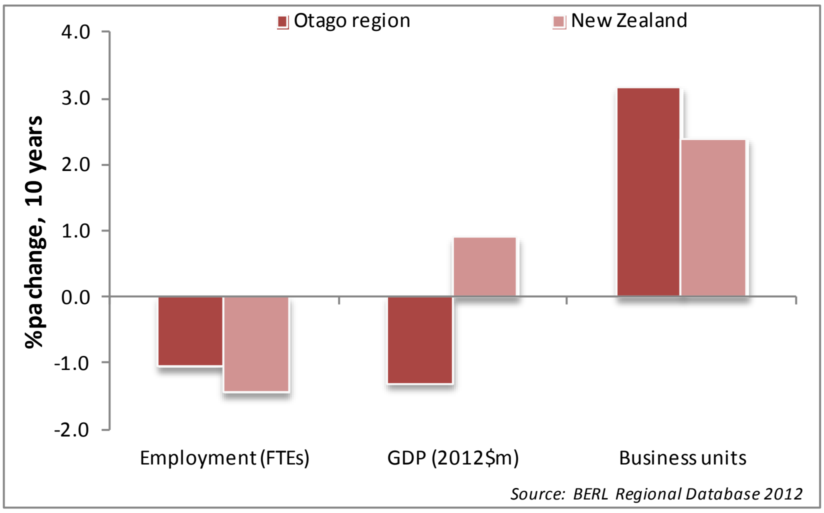
Creative sector Business units	Year ending March				%pa change	
	2002	2010	2011	2012	*2011 to 2012*	*2002 to 2012*
Printing and publishing	70	88	89	91	*2.2*	*2.7*
Arts and antiques market	71	58	53	65	*22.6*	*-0.9*
Commercial services	182	289	291	301	*3.4*	*5.2*
Film, video and television services	99	127	136	128	*-5.9*	*2.6*
Music, creative and performing arts and venues	147	203	198	192	*-3.0*	*2.7*
Creative sector	**569**	**765**	**767**	**777**	***1.3***	***3.2***
Total business units: Otago region	**20,101**	**26,169**	**25,952**	**26,114**	***0.6***	***2.7***

Source: BERL Regional Database 2012

- The number of Business Units in the Creative sector has grown by 10 in 2012.
- Over the last decade, Business Units in the Creative sector have increased by 3.2 percent per annum.

Figure 2.30 shows the change in employment, GDP and business units in the Creative sector in the Otago Region and at a national level since 2002.

Figure 2.30. Creative sector key indicator growth, Otago Region vs. New Zealand, 2002 - 2012



- While new business units were established, keeping employment and GDP growth in line with national trends has been a challenge for Otago Region's Creative sector.

2.8.5 Education & Research sector[25]

Table 2.28 presents the recent and longer-term contribution of the Education and Research sector's employment to the Otago Regional economy. The Education and Research sector has experienced employment growth of 5.1 percent per annum over the last decade.

Table 2.28. Education & Research sector Employment, Otago Region, and 2002 - 2012

Education & research sector Employment (FTEs)	Year ending March				%pa change	
	2002	2010	2011	2012	2011 to 2012	2002 to 2012
Preschool Education	392	759	810	856	5.7	8.1
Primary and Secondary Education	3,070	3,035	3,195	3,037	-4.9	-0.1
Higher Education	1,503	4,760	4,517	4,282	-5.2	11.0
Other Education	142	321	344	315	-8.4	8.3
Scientific Research	324	464	505	427	-15.5	2.8
Education & research sector	**5,432**	**9,339**	**9,370**	**8,916**	***-4.8***	***5.1***
Total employment: Otago Region	**78,916**	**93,726**	**93,942**	**94,606**	***0.7***	***1.8***

Source: BERL Regional Database 2012

- In 2012, net employment in the Education and Research sector was down 454 FTEs in the Otago Region.

[25] The Education & Research sector is based on the ANZSIC 2006 definition of education and scientific research industries. This definition only includes organisations whose primary activity is either education or scientific research. This does not include all related activities such as Research and Development taking place in individual businesses.

- Employment in Higher Education; and Primary and Secondary Education, which are the two largest industries in the sector by employment, fell by 5.2 percent and 4.9 percent respectively in 2012. The small increase in employment in the Preschool Education industry could not offset the overall effect on employment for the Education and Research sector.
- Over the last decade, Higher Education and Other Education industries have had the strongest employment growth, adding 278 FTEs and 17 FTEs per year since 2002, respectively. Preschool Education and Scientific Research also showed positive gains, adding 57 FTEs per annum.

Table 2.29 presents the recent and longer-term contribution of the Education & Research sector GDP to the Otago Region economy.

Table 2.29. Education and Research sector GDP, Otago Region, 2002 - 2012

Education & research sector GDP (2012$m)	**Year ending March**				***%pa change***	
	2002	**2010**	**2011**	**2012**	***2011 to 2012***	***2002 to 2012***
Preschool Education	26	37	40	42	*6.8*	*4.9*
Primary and Secondary Education	205	149	156	150	*-3.9*	*-3.1*
Higher Education	100	234	220	211	*-4.1*	*7.7*
Other Education	9	16	17	16	*-7.4*	*5.1*
Scientific Research	33	43	46	40	*-14.2*	*1.8*
Education & research sector	**374**	**479**	**479**	**459**	***-4.2***	***2.1***
Total GDP: Otago Region	**7,227**	**8,819**	**8,732**	**8,980**	***2.8***	***2.2***

Source: BERL Regional Database 2012

- There was a fall in GDP in the Education and Research sector in 2012. Again, the decline was brought about by Higher Education; Primary and Secondary Education; Scientific Research and Other Education. The $2.0 million increase in GDP from Preschool Education could not offset the total decreases in other education and research industries.
- Over the past decade, the Education and Research sector has had a moderate increase in GDP, growing at an average of 2.1 percent per annum. This rate is almost equal to the region's average annual GDP growth rate for this sector. Higher Education, Other Education and Preschool Education flourished during this period, with GDP growing by 7.7 percent, 5.1 percent, and 4.9 percent per annum, respectively.

Table 2.30 presents the recent and longer-term contribution of Education and Research sector's business units to the Otago Region economy.

Table 2.30. Education and Research sector Business Units, Otago Region, 2002 - 2012

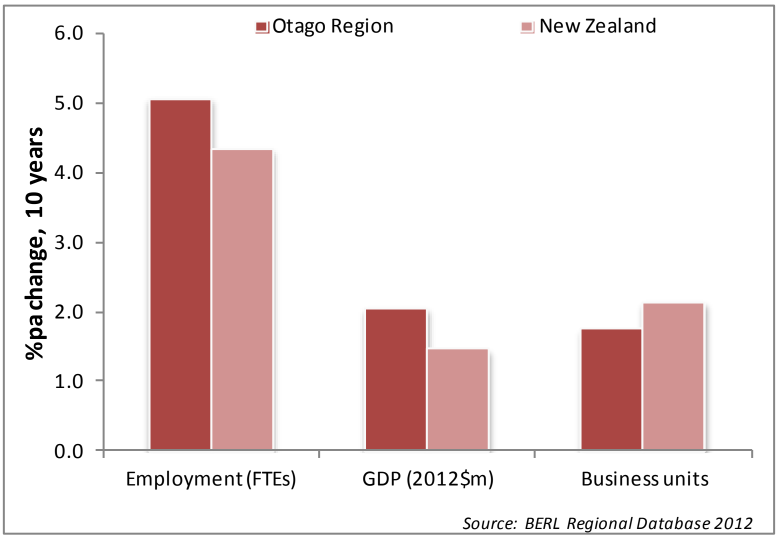
Education & research sector Business units	Year ending March				%pa change	
	2002	2010	2011	2012	*2011 to 2012*	*2002 to 2012*
Preschool Education	116	136	137	139	*1.5*	*1.8*
Primary and Secondary Education	177	163	158	157	*-0.6*	*-1.2*
Higher Education	24	39	38	47	*23.7*	*7.0*
Other Education	96	134	130	129	*-0.8*	*3.0*
Scientific Research	65	98	97	97	*0.0*	*4.1*
Education & research sector	**478**	**570**	**560**	**569**	***1.6***	***1.8***
Total business units: Otago Region	**20,101**	**26,169**	**25,952**	**26,114**	***0.6***	***2.7***

Source: BERL Regional Database 2012

- 2012 has seen an increase in business units for Education and Research sector, which is due to growths in Higher Education and Preschool Education, of 11 Business Units.
- The number of business units in the sector has grown by 1.8 percent per annum over the decade. Fastest growth has been in Scientific Research and Other Education sectors.

Figure 2.31 shows the change in employment, GDP and business units in the Education and Research sector in the Otago Region and at a national level since 2002.

Figure 2.31. Education and Research sector key indicator growth, Otago Region vs. New Zealand, 2002 - 2012



- The growth in the sector across employment and GDP were faster than the national growth. However, the business units growth in Otago Region was slower than the national growth.

2.8.6 Engineering, Machinery & Equipment Manufacturing[26]

Table 2.31 presents the recent and longer-term contribution of the Engineering, Machinery and Equipment Manufacturing sector to employment in the Otago Region economy.

Table 2.31. Engineering, Machinery & Equipment Manufacturing Employment, Otago Region, 2002 - 2012

Engineering, machinery & equipment manufacturing sector Employment (FTEs)	Year ending March				%pa change	
	2002	2010	2011	2012	2011 to 2012	2002 to 2012
Machinery and Equipment Manufacturing	628	624	617	606	-1.7	-0.4
Consultant Engineering Services	341	512	507	579	14.2	5.4
Engineering, machinery & equipment manufacturing sector	**969**	**1,136**	**1,124**	**1,186**	**5.5**	**2.0**
Total Employment: Otago Region	**78,916**	**93,726**	**93,942**	**94,606**	**0.7**	**1.8**

Source: BERL Regional Database 2012

- In 2012, employment increased by 5.5 percent compared to 0.7 percent growth in the Otago Region. The increase in growth was mainly from the Consultant Engineering Services industry.
- Looking at the 10-year employment trends, this sector has average annual employment growth of 2.0 percent per year, which is higher than the average Otago Region growth rate of 1.8 percent.

Table 2.32 presents the recent and longer-term contribution of the Engineering, Machinery and Equipment Manufacturing sector GDP to the Otago Region economy.

Table 2.32. Engineering, Machinery and Equipment Manufacturing GDP, Otago Region, 2002 - 2012

Engineering, machinery & equipment manufacturing sector GDP (2012$m)	Year ending March				%pa change	
	2002	2010	2011	2012	2011 to 2012	2002 to 2012
Machinery and Equipment Manufacturing	52	54	59	61	2.7	1.5
Consultant Engineering Services	35	47	46	54	15.9	4.4
Engineering, machinery & equipment manufacturing sector	**87**	**101**	**105**	**114**	**8.5**	**2.7**
Total GDP: Otago Region	**7,227**	**8,819**	**8,732**	**8,980**	**2.8**	**2.2**

Source: BERL Regional Database 2012

- After a slump in 2010, GDP steadily increased until 2012. Growth in GDP in 2012 was driven by both the Machinery and Equipment Manufacturing industry and the Consultant Engineering Services industry.
- The Machinery and Equipment Manufacturing industry had solid growth over the past decade of 1.5 percent per annum. While growth in both industries has been positive over the past decade, the Consultant Engineering Services has had the greatest growth, where GDP has increased by 4.4 percent per annum.

[26] The engineering sector is based on the ANZSIC industries of consultant engineering services, and machinery and equipment manufacturing.

Table 2.33 presents the recent and longer-term contribution of Engineering, Machinery and Equipment Manufacturing sector business units to the Otago Regional economy.

Table 2.33. Engineering, Machinery & Equipment Manufacturing Business Units, Otago Region, 2002 - 2012

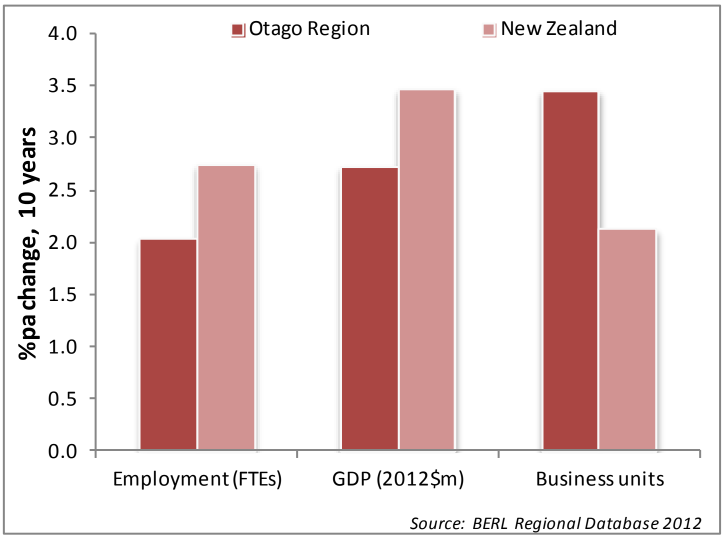
Engineering, machinery & equipment manufacturing sector Business units	Year ending March				%pa change	
	2002	2010	2011	2012	*2011 to 2012*	*2002 to 2012*
Machinery and Equipment Manufacturing	119	125	121	125	*3.3*	*0.5*
Consultant Engineering Services	118	192	201	208	*3.5*	*5.8*
Engineering, machinery & equipment manufacturing sector	**237**	**317**	**322**	**333**	***3.4***	***3.5***
Total Business units: Otago Region	**20,101**	**26,169**	**25,952**	**26,114**	***0.6***	***2.7***

Source: BERL Regional Database 2012

- Business units were up slightly by 3.4 percent in 2011. Consultant Engineering Services expanded by seven business units, while Machinery and Equipment Manufacturing had four additional business units.
- Business units in the sector have grown by 3.5 percent per annum since 2002. More than 90 business units have entered the sector, the majority of which have been in the Consultant Engineering Services industry.

Figure 2.32 shows the change in employment, GDP and business units in the Engineering, Machinery and Equipment Manufacturing sector in the Otago Region and nationally since 2002.

Figure 2.32. Engineering, Machinery & Equipment Manufacturing, Otago vs. New Zealand, 2002 - 2012



- The Otago Region had solid growth in the three key economic indicators since 2002. The rate of growth has been similar to national growth, apart from business units, where the Otago Region growth has been almost 50 percent faster.

2.8.7 Information and communication technology (ICT) sector[27]

Table 2.34 presents the recent and longer-term contribution of the ICT sector to regional employment between 2002 and 2012.

Table 2.34. ICT Employment, Otago Region, 2002 - 2012

ICT sector Employment (FTEs)	Year ending March				%pa change	
	2002	2010	2011	2012	2011 to 2012	2002 to 2012
Manufacturing	60	53	41	47	13.0	-2.5
Wholesaling	292	296	308	357	16.1	2.0
Telecommunication services	55	74	83	74	-10.7	2.9
Commercial services	196	278	299	265	-11.3	3.1
ICT sector	**603**	**700**	**731**	**743**	**1.7**	**2.1**
Total employment: Otago Region	**78,916**	**93,726**	**93,942**	**94,606**	**0.7**	**1.8**

Source: BERL Regional Database 2012

- In 2012, Otago Region's ICT sector employed 743 people, up 1.7 percent on the previous year.
- Over the past decade, employment growth in the ICT sector has been modest at 2.1 percent per annum. Among the industries within the sector, Commercial Services has had the fastest growth over the last decade at 3.1 percent per annum.[28]

Table 2.35 presents the recent and longer-term contribution of the ICT sector to regional GDP between 2002 and 2012.

Table 2.35. ICT GDP, Otago Region, 2002 - 2012

ICT sector GDP (2012$m)	Year ending March				%pa change	
	2002	2010	2011	2012	2011 to 2012	2002 to 2012
Manufacturing	5	5	4	5	18.4	-0.4
Wholesaling	34	33	36	42	17.6	2.1
Telecommunication services	46	80	90	74	-18.0	4.8
Commercial services	62	72	57	41	-28.1	-4.0
ICT sector	**147**	**190**	**187**	**162**	**-13.4**	**0.9**
Total GDP: Otago Region	**7,227**	**8,819**	**8,732**	**8,980**	**2.8**	**2.2**

Source: BERL Regional Database 2012

- GDP in the ICT sector declined in 2012, led by declines in the Commercial Services and Telecommunication Services industries. This was not offset (in net terms) by the increases in the Manufacturing and Wholesaling industries.

[27] The ICT sector includes Business Units that are primarily engaged in telecommunication, geospatial, electrical and electronic services, manufacturing and operation.

[28] Among the industries under ICT's commercial services are those in the electronic information storage, internet publishing and broadcasting, data processing and web hosting, electronic information storage services.

- Over the decade, the sector has had annual GDP increases of 0.9 percent, lagging behind GDP growth in the region. Greatest growth has come from Telecommunication services (4.8 percent per annum) and Commercial Services (2.1 percent per annum).

Table 2.36 presents the recent and longer-term contribution of the ICT sector to regional business units between 2002 and 2012.

Table 2.36. ICT Business Units, Otago Region, 2002 - 2012

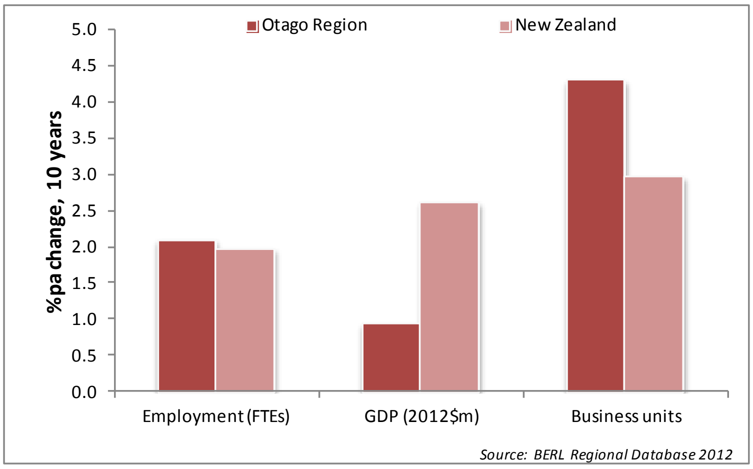
ICT sector Business units	Year ending March				%pa change	
	2002	2010	2011	2012	2011 to 2012	2002 to 2012
Manufacturing	11	8	7	8	*14.3*	*-3.1*
Wholesaling	82	75	74	72	*-2.7*	*-1.3*
Telecommunication services	12	11	12	11	*-8.3*	*-0.9*
Commercial services	99	194	208	220	*5.8*	*8.3*
ICT sector	**204**	**288**	**301**	**311**	***3.3***	***4.3***
Total business units: Otago Region	**20,101**	**26,169**	**25,952**	**26,114**	***0.6***	***2.7***

Source: BERL Regional Database 2012

- Business unit growth in the ICT sector has come from Commercial Services industry, which has added 12 units in 2012 and more than doubled in size over the last decade. The Commercial Services industry now accounts for over two-thirds of Business Units in the ICT sector.

Figure 2.33 shows the change in employment, GDP and Business Units in ICT sector in the Otago Region and nationally since 2002.

Figure 2.33. ICT sector key indicator growth, Otago Region vs. New Zealand, 2002 - 2012



- While growth in employment and business units in the Otago Region ICT sector has grown faster than nationally, this has not flowed through to GDP growth. This is because a large proportion of ICT sector GDP comes from the wholesaling and telecommunications services industries, whereas the growth has occurred in the Commercial Services industry.

3 Central Otago District

3.1 Economy - Central Otago District

Table 3.1 shows the key indicators for the eight sectors in the Central Otago District in 2012.

Table 3.1. GDP, employment and business units by sector, Central Otago, 2012

Sectors (2012)	FTEs	%	GDP (2012$m)	%	Business units	%
Primary	3,164	*31.3%*	251	*30.9%*	944	*28.8%*
Manufacturing	581	*5.7%*	77	*9.5%*	132	*4.0%*
Construction	1,442	*14.3%*	86	*10.6%*	356	*10.9%*
Wholesale and Distribution	652	*6.5%*	86	*10.6%*	191	*5.8%*
Retail Trade and Services	1,512	*15.0%*	83	*10.2%*	439	*13.4%*
Business Services	1,326	*13.1%*	134	*16.5%*	982	*29.9%*
Arts and Recreation Services	92	*0.9%*	6	*0.8%*	73	*2.2%*
Social Services	1,334	*13.2%*	89	*10.9%*	163	*5.0%*
Sub-total (excluding O.O.D.)	10,103	100.0%	811	100.0%	3,280	100.0%
*Owner-Occupied Dwellings**			114			
Total	**10,103**		**926**		**3,280**	

* Imputed value, included in Total GDP only *Source: BERL Regional Database, 2012*

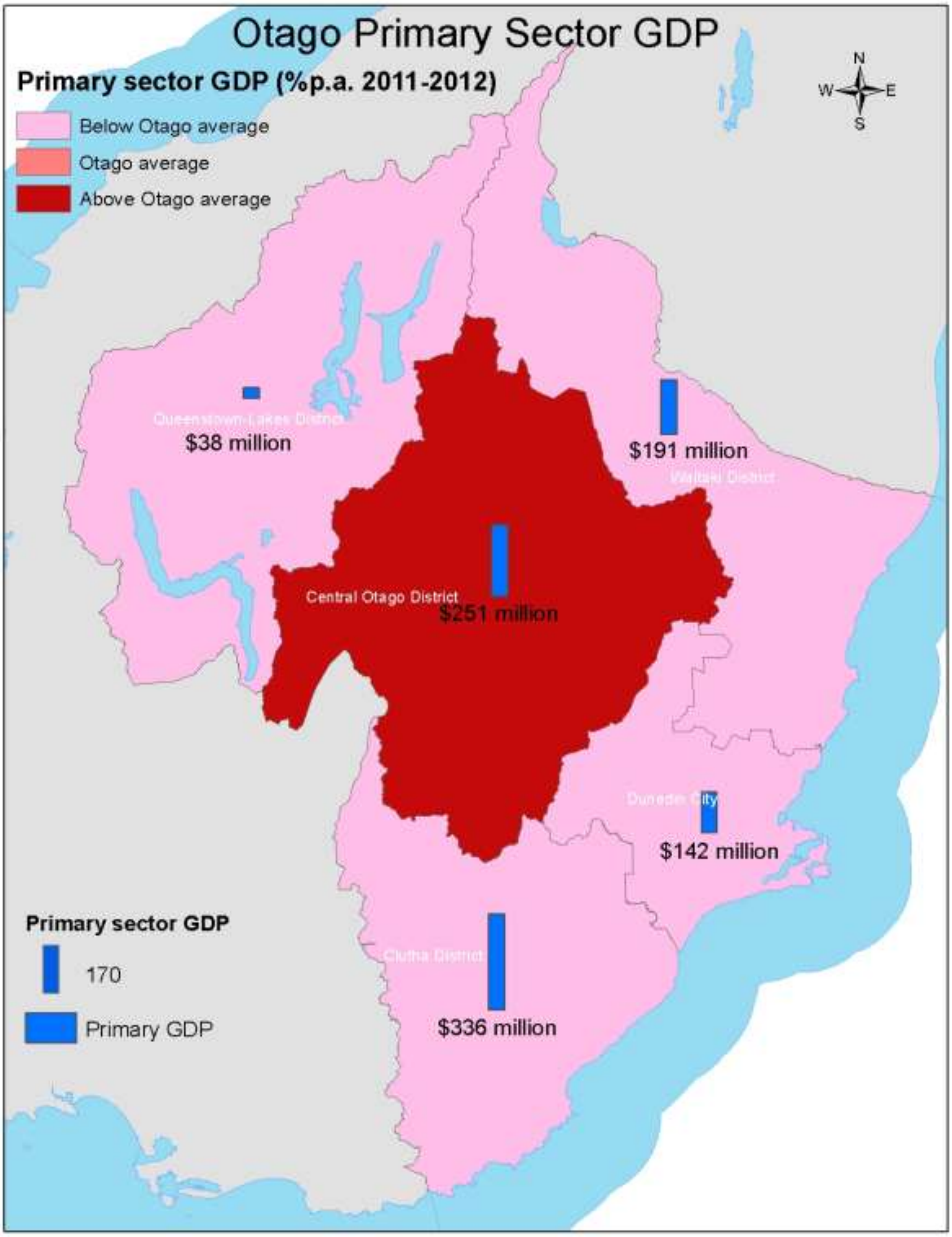
The District's employment was 10,103 FTEs spread across 3,280 businesses in 2012. The Primary sector is the District's largest employer (31.3 percent) and GDP generator (30.9 percent). The Business Services sector had the greatest proportion of business units in the district at 29.9 percent.

It is important to put the results for the Primary sector in a national context. At a national level, GDP in the Primary sector had a strong increase in 2012 (15.2 percent), but employment fell slightly (-0.7 percent). The output growth was particularly concentrated in the industries of Agriculture (30.8 percent) and Agriculture Forestry and Fishing Support Services (26.5 percent). At a regional level, this means for areas that increased employment in the Primary sector (and in the Agriculture or Agriculture Services industries), the *estimated* GDP grew more quickly than the national average.

Figure 3.1 shows that the Central Otago District made a substantial contribution to GDP growth in the Primary sector (rising by an estimated 40.3 percent in the year to March 2012). This pushed the regional GDP growth rate for this sector up to 24.5 percent. While the other districts sat below the rapid regional average, they all had GDP growth rates in the Primary sector in excess of 17 percent.

Although Clutha District had the highest total GDP ($336 million) among the other districts in the region, its GDP growth (20.8 percent) was lower than the Central Otago District.

Figure 3.1. Primary sector GDP, Otago Region, 2012



3.2 Economic performance – Central Otago District

Table 3.2 presents the key performance indicators in Central Otago compared to the region and nationally. Figures in green background indicate that the District grew more quickly than the national average.

Table 3.2. Key performance indicators, Central Otago, 2012

Key Performance Indicators	%pa for 2012 year		
	Central Otago	Otago Region	New Zealand
Resident population growth	**0.8**	0.6	0.6
GDP growth	**8.0**	2.8	1.9
GDP per capita growth	**7.1**	2.2	1.3
Employment growth	**1.4**	0.7	1.0
Labour productivity growth	**7.5**	2.4	1.0
Business units growth	**-0.5**	0.6	-0.2
Business size growth	**1.9**	0.1	1.2

Source: BERL Regional Database, 2012

In the year to March 2012, GDP in the Central Otago District shot up by 8.0 percent compared to levels a year earlier. The growth was largely due to the Fishing Hunting and Trapping; and Transport and the Equipment Manufacturing industries. Export based sectors, such as the Primary sector, saw a large increase in GDP contribution. Large movements in GDP were in the following sectors:

- Primary – the primary sector is making some good progress. Employment in the agriculture industry, which makes up the bulk of the District's primary sector, rose by 182 FTEs (8.5 percent). Estimated GDP in this sector grew by 40.3 percent (up $72 million). However, as noted in the caveats (section 1.2.1, page 2), this estimate may overstate the actual growth in GDP in this sector. Much of this sector's GDP growth (at a national level) was driven by the dairy industry, which makes up a relatively smaller part of Central Otago's agricultural sector.
- Manufacturing - GDP was up 6.0 percent (up $4.0 million). The increase came from Petroleum and Coal Product Manufacturing; and Fabricated Metal Product Manufacturing industries.
- Construction - GDP fell $8 million (down 8.5 percent from 2011 GDP). This decrease is largely due to a 15.4 percent decrease in the Building Construction industries.
- Business Services - GDP dropped $6.0 million (down 4.1 percent). The drop was due to a decrease to GDP in the Professional Scientific and Technical Services ($4.0 million).

There were net increases in both employment and GDP in the Central Otago District. It gained 137 FTEs (up 1.4 percent) and a GDP of $67 million (up 9.0 percent). Out of this increase, 186 FTEs were from the Primary sector. In the year to March 2012, the number of people working in Wholesale and Distribution, and Retail Trade and Service industries also increased.

The Stone Fruit Growing industry in Central Otago District generated additional 136 FTEs, which contributed to the employment growth for the year to March 2012. In the case of Sheep Farming (Specialised) industry, the increase of 44 FTEs was associated with 19 new business units.

Table 3.3 looks at the same indicators across Central Otago District, the Otago Region and New Zealand for the last ten-year period.

Table 3.3. Key performance indicators, Central Otago District, 2002 to 2012

Key Performance Indicators	%pa for 2002 - 2012		
	Central Otago	Otago Region	New Zealand
Resident population growth	**2.0**	1.0	1.2
GDP growth	**4.3**	2.2	2.3
GDP per capita growth	**2.2**	1.2	1.1
Employment growth	**3.4**	1.8	1.8
Labour productivity growth	**1.0**	0.4	0.5
Business units growth	**3.1**	2.7	2.1
Business size growth	**0.4**	-0.8	-0.3

Source: BERL Regional Database, 2012

Looking at the selected performance indicators over the past 10 years, the Central Otago District has performed well above regional and national averages in GDP, employment, business units, business size and population growth.

3.3 Fastest growing industries – Central Otago District[29]

Table 3.4 presents the 10 industries with the fastest growth trends in the Central Otago District by FTE employment in the ten years to March 2012.

Table 3.4. Ten fastest growing industries by FTE growth, Central Otago District, 2002 to 2012

Rank by FTE growth	Industry	Employment (FTEs) 2002	2012	%pa growth
1	Social Assistance Services	9	116	29.1
2	Administrative Services	106	590	18.7
3	Beverage and Tobacco Product Manufacturing	70	222	12.3
4	Medical and Other Health Care Services	91	256	10.9
5	Basic Material Wholesaling	46	103	8.4
6	Agriculture Forestry and Fishing Support Services	371	768	7.6
7	Residential Care Services	64	132	7.5
8	Food and Beverage Services	201	364	6.1
9	Construction Services	250	454	6.1
10	Heavy and Civil Engineering Construction	461	727	4.7

Source: BERL Regional Database, 2012

Social Assistance Services had the district's fastest employment growth between 2002 and 2012. It has added 107 FTEs, which is equivalent to 11 FTEs per annum. Employment in industries related to the wine industry such as Beverage and Tobacco Product Manufacturing, Food and Beverage Services, and Agriculture Forestry and Fishing Support Services showed rapid growth.

Population growth has been the other driver, supporting rapid growth in a number of industries such as Construction Services and Heavy and Civil Engineering Construction.

3.4 Key Sectors – Central Otago District

This section presents the recent and longer-term contribution of employment, GDP and business units in the six key sectors in the Central Otago District. Specific to Central Otago, we also discuss activity in the Horticulture and Fruit-growing and Viticulture sectors.

3.4.1 Horticulture and Fruit-growing

Table 3.5 shows the number of business units and FTEs in the Horticulture and Fruit-growing sector in Central Otago from 2002 to 2012.

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

Table 3.5. Horticulture and fruit growing sector, Central Otago District, 2002 to 2012

	Business units					
					%pa change	
Industry	**2002**	**2010**	**2011**	**2012**	**2011/12**	**2002/12**
Grape Growing	69	129	127	112	-11.8	5.0
Kiwifruit Growing	0	0	0	0	na	na
Berry Fruit Growing	1	3	3	4	33.3	14.9
Apple and Pear Growing	56	19	17	17	0.0	-11.2
Stone Fruit Growing	103	93	91	97	6.6	-0.6
Citrus Fruit Growing	0	0	0	0	na	na
Olive Growing	3	3	3	4	33.3	2.9
Other Fruit and Tree Nut Growing	21	14	12	12	0.0	-5.4
Horticulture and Fruit Growing	253	261	253	246	-2.8	-0.3

	Full time equivalents					
					%pa change	
Industry	**2002**	**2010**	**2011**	**2012**	**2011/12**	**2002/12**
Grape Growing	105	340	414	380	-8.2	13.7
Kiwifruit Growing	0	0	0	0	na	na
Berry Fruit Growing	3	0	3	0	na	-100.0
Apple and Pear Growing	534	28	53	95	79.2	-15.9
Stone Fruit Growing	811	1140	1107	1243	12.3	4.4
Citrus Fruit Growing	0	0	0	0	na	na
Olive Growing	0	0	0	0	na	na
Other Fruit and Tree Nut Growing	114	0	3	3	0.0	-30.5
Horticulture and Fruit Growing	1567	1508	1580	1721	8.9	0.9

Source: BERL Regional Database

In 2012, employment in the Horticulture and Fruit-growing sector increased. This was mainly driven by increased employment in the Apple and Pear Growing and Stone Fruit Growing industries.

Overall, trends in the horticulture and fruit-growing sector have been driven by changes in the Grape Growing; Apple and Pear Growing; and Stone Fruit Growing industries' employment.

The wine industry lost businesses and jobs following the 2008 economic downturn. Although the activity has picked up in 2011, it declined again in 2012. In 2012, employment in Grape Growing declined 8.3 percent and the number of business units were declined 11.8 percent, the lowest for both industries in seven years.

Employment in the Stone Fruit Growing industry has eased between 2009 and 2011, but picked up slightly in 2012, up 12.3 percent. It is still the largest employer in the Horticulture and Fruit Growing sector. Further, business units increased in 2012.

3.4.2 Viticulture

Consolidation among grape growers and winemakers occurred in the past two years. Annual production at vineyards in the Central Otago District increased in the year to 2012, but it is still below the peak of 2008. The sector also managed to expand the current number of wineries. Of the 703 wineries in New Zealand, 120 are in Central Otago. The District's wine industry is a major source of export earnings for the regional and national economy and a driver of tourism within the district and region.

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

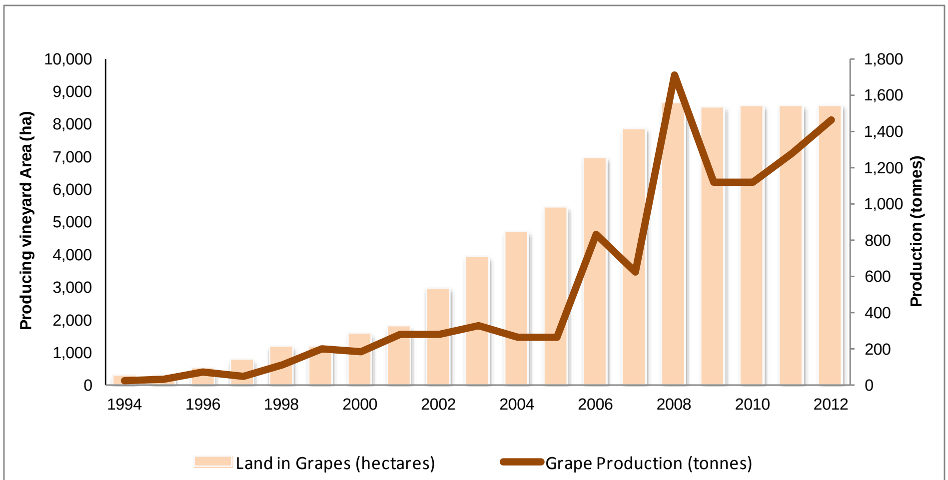
Table 3.6. Wine industry statistics, Central Otago District, 2000 to 2012

	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Producing Vineyard Area (ha)													
Central Otago	280	322	534	703	844	978	1,253	1,415	1,552	1,532	1,540	1,540	1,543
Total New Zealand	10,197	11,648	13,787	15,800	18,112	21,002	22,616	25,355	29,310	31,964	33,428	33,400	33,400
Production (Tonnes)													
Central Otago	1,009	1,543	1,519	1,825	1,439	1,441	4,612	3,434	9,495	6,218	6,196	7,104	8,115
Total New Zealand	80,100	71,000	118,700	76,400	165,500	142,000	185,000	205,000	285,000	285,000	266,000	328,000	269,000
Wineries													
Central Otago	39	45	46	52	75	82	82	89	95	103	111	115	120
Total New Zealand	358	380	398	421	463	516	530	543	585	643	672	698	703
Grape Growers													
Central Otago				42	11	17	50	63	75	77	35	35	
Total New Zealand				634	594	825	875	1,007	1,073	1,128	851	824	

Source: New Zealand Winegrowers Annual Vintage Surveys

The vineyards allotted for grape production remains stable. Figure 3.2 shows land in grapes and grape production.

Figure 3.2. Land in grapes and production, Central Otago District, 1994 to 2012



Source: New Zealand Vintage Wine Surveys

Table 3.7 shows the recent pattern of employment in industries directly connected with the wine industry.

Table 3.7. Employment in the wine industry, Central Otago District, 2002 to 2012

Employment (FTEs)	Year ending March			% pa change	
	2002	2011	2012	2011 to 2012	2002 to 2012
Grape Growing	105	414	**380**	-8.3	*13.7*
Wine and Other Alcoholic Beverage Manufacturing	70	211	**222**	5.6	*12.3*
Viculture sector	**175**	**624**	**602**	***-3.6***	***13.2***

Source: BERL Regional Database 2012

Employment in industries related to the wine industry decreased significantly in the year to 2012.

3.4.3 Tourism sector

Table 3.8 presents the contribution of tourism to employment, GDP and business units in the Central Otago District in 2012.

Table 3.8. Tourism sector key indicators, Central Otago District, 2012

Role of tourism in local economy	Employment	%	GDP ($2012m)	%	Number of Business Units	%
Tourism-characteristic industries	338	*3.3%*	16.5	*1.7%*	124	*3.8%*
Tourism-related industries	96	*0.9%*	6.9	*0.7%*	23	*0.7%*
All non-tourism-related industries	82	*0.8%*	8.1	*0.9%*	26	*0.8%*
Central Otago	**516**	***5.1%***	**31.5**	***3.3%***	**172**	***5.2%***
New Zealand	**102,453**	***5.5%***	**7,458.5**	***3.6%***	**20,739**	***4.1%***

Source: BERL Regional Database 2012

- In the year to October 2012, the Tourism sector contributed $31.5 million (3.3 percent of the total Central Otago GDP) in 2012. The Tourism sector consisted of 172 establishments and employed 516 FTEs in the District.
- The Tourism sector's contributions to the Central Otago District economy are as follows: 5.1 percent of employment, 3.3 percent of GDP and 5.2 percent of business units. Only the growth in business units was higher than the national growth, which was 4.1 percent.

Table 3.9 presents the recent and longer-term contribution of tourism employment to the Central Otago District.

Table 3.9. Tourism Employment in Central Otago District, 2002 - 2012

Tourism Employment (FTEs)	Years ending March				%pa change	
	2002	2010	2011	2012	2011 to 2012	2002 to 2012
Tourism-characteristic industries	228	407	414	338	-18.2	4.0
Tourism-related industries	92	123	125	96	-23.0	0.4
All non-tourism-related industries	57	100	99	82	-17.2	3.7
Tourism Sector	**377**	**630**	**638**	**516**	**-19.0**	**3.2**
Total Employment: Central Otago	**7,200**	**9,856**	**9,966**	**10,103**	**1.4**	**3.4**

Source: BERL Regional Database 2012

- In 2012, employment growth in the Tourism sector contracted in the Central Otago District, decreasing by 19.0 percent, or 122 FTEs.
- Over the last ten years, employment in tourism in the Central Otago District has increased by 3.2 percent per annum while total employments in the Central Otago District increased by 3.4 percent.

Table 3.10 presents the recent and longer-term contribution of tourism GDP to the Central Otago District economy.

Table 3.10. Tourism GDP in Central Otago District, 2002 – 2012

Tourism GDP (2012$m)	Years ending March				%pa change	
	2002	2010	2011	2012	2011 to 2012	2002 to 2012
Tourism-characteristic industries	12	18	19	16	-15.2	3.6
Tourism-related industries	4	8	8	7	-17.6	5.1
All non-tourism-related industries	5	10	10	8	-14.7	4.1
Tourism Sector	**21**	**37**	**37**	**31**	**-15.6**	**4.0**
Total GDP: Central Otago	**609**	**868**	**857**	**926**	**8.0**	**4.3**

Source: BERL Regional Database 2012

- GDP attributable to the Tourism sector declined by $6 million from its 2011 value. As shown in Table 3.10, declines were seen across the full range of industries in the Tourism sector.
- The ten-year GDP performance indicates that the Central Otago District's Tourism sector grew by 4.0 percent per annum. This is slightly lower compared to the 4.3 percent per annum growth in the District's total GDP.

Table 3.11 presents the recent and longer-term contribution of tourism business units to the Central Otago District economy.

Table 3.11. Tourism Business Units in Central Otago District, 2002 - 2012

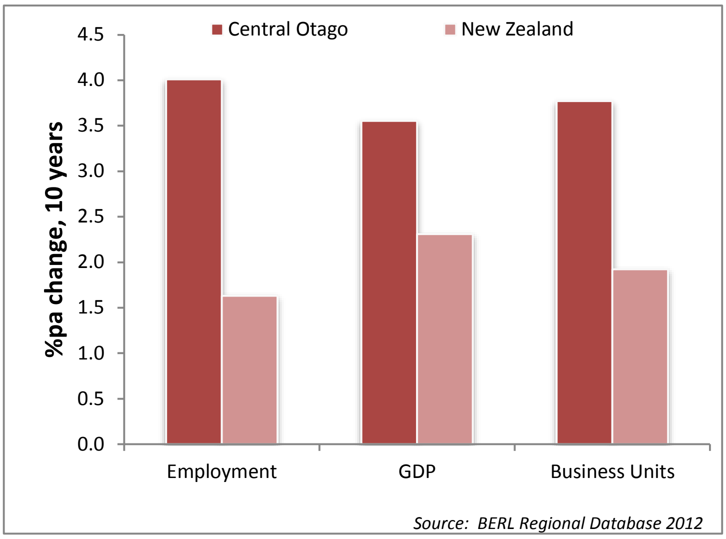
Tourism Business units	Years ending March				%pa change	
	2002	2010	2011	2012	2011 to 2012	2002 to 2012
Tourism-characteristic industries	85	138	139	124	-11.2	3.8
Tourism-related industries	18	28	28	23	-19.0	2.3
All non-tourism-related industries	19	32	32	26	-17.9	3.0
Tourism Sector	**123**	**198**	**199**	**172**	**-13.4**	**3.4**
Total Business Units: Central Otago	**2,422**	**3,277**	**3,297**	**3,280**	**-0.5**	**3.1**

Source: BERL Regional Database 2012

- The number of business units in the sector has decreased by 27 business units from the 2011 level of 199 business units.

Figure 3.3 shows changes in employment, GDP and business units in the Tourism sector in the Central Otago District compared to New Zealand over the past ten years.

Figure 3.3. Tourism sector key indicator growth, Central Otago District vs. New Zealand, 2002 - 2012



- The Tourism sector in the Central Otago District had increased across all three indicators over the past ten years and grew faster than the national level over the same period.

3.4.4 Primary Production sector

The Primary Production sector contributed 31 percent of employment, 31 percent of GDP and 29 percent of business units in Central Otago.

Agriculture is the major industry within the Primary Production sector. It accounts for 98 percent of employment and 96 percent of GDP within the sector when combined with the Agriculture; and Services to Agriculture, Hunting, and Trapping industries.

Table 3.12 presents the recent and longer-term contribution of Primary Production employment to the Central Otago District economy.

Table 3.12. Primary Production Employment, Central Otago District, 2002 - 2012

Primary production sector Employment (FTEs)	Year ending March				%pa change	
	2002	2010	2011	2012	*2011 to 2012*	*2002 to 2012*
Agriculture	2,100	2,058	2,152	2,334	*8.5*	*1.1*
Aquaculture	0	0	0	0	*na*	*na*
Services to Agriculture; Hunting and Trapping	374	742	775	778	*0.4*	*7.6*
Forestry and Logging	12	12	15	18	*20.9*	*3.9*
Mining and services to mining	0	23	37	33	*-8.4*	*na*
Primary production sector	**2,486**	**2,835**	**2,978**	**3,164**	***6.2***	***2.4***
Total employment: Central Otago	**7,200**	**9,856**	**9,966**	**10,103**	***1.4***	***3.4***

Source: BERL Regional Database 2012

- In 2012, the Primary Production sector employed 3,164 FTEs, 186 FTEs or 6.2 percent more than in 2011. The main increase came from the Agriculture industry, which accounted for 182

FTEs, or around 98 percent of the increase. Employment in the Mining and Services to Mining industry decreased by 8.4 percent in 2012.

- Over the last decade, employment in the Primary Production sector has increased by 2.4 percent per annum, slightly slower than employment growth in the District. However, employment in the Services to Agriculture; Hunting and Trapping; and Mining and Services to Mining industries have increased by 7.6 percent and 3.9 percent per annum, respectively.

Table 3.13 presents the recent and longer-term contribution of Primary Production GDP to the Central Otago District economy.

Table 3.13. Primary Production GDP in Central Otago District, 2002 - 2012

Primary production sector GDP (2012$m)	Year ending March				%pa change	
	2002	2010	2011	2012	*2011 to 2012*	*2002 to 2012*
Agriculture	124.3	133.7	122.7	175.2	*42.8*	*3.5*
Aquaculture	0.0	0.0	0.0	0.0	*na*	*na*
Services to Agriculture; Hunting and Trapping	23.4	51.1	45.6	64.3	*41.0*	*10.6*
Forestry and Logging	4.0	5.6	7.2	8.9	*23.3*	*8.3*
Mining and services to mining	0.0	2.1	3.2	2.3	*-28.2*	*na*
Primary production sector	**151.7**	**192.5**	**178.7**	**250.7**	**40.3**	***5.1***
Total GDP: Central Otago	**608.7**	**868.0**	**856.8**	**925.5**	**8.0**	***4.3***

Source: BERL Regional Database 2012

- In 2012, the Primary Production sector contributed $251 million to the Central Otago District economy, up 40 percent from a year earlier. This is a significantly higher rate compared to the GDP growth in the district. The Primary Production sector accounts for just under a third of the Central Otago District economy.
- Over the decade, Primary Production sector GDP grew by 5.1 percent per annum, faster than the District's GDP growth of 4.3 percent per annum.

As noted previously, the estimates of the primary sector's GDP in the Otago region and its districts is likely to be an over-estimate, due to the strong growth of the dairy industry (at a national level). Employment in this sub-industry accounted for only around 3.5 percent of Central Otago's employment in 2012, compared with just over one third (36.5 percent) at the national level.

In the year to March 2012, producer prices in the agriculture industry grew, particularly for sheep and beef farming (11 percent) and Dairy farming[30] (6 percent), with softer growth in prices for horticulture and fruit growing (2.3 percent). This price growth will lift the productivity of workers, and therefore GDP, in Central Otago's agricultural industries. The District's actual GDP growth for this industry is likely to be between its employment growth rate (8.5 percent) and the estimated GDP growth rate (42.8 percent).

[30] Note, prices for dairy product manufacturing have also grown strongly since 2007, although the softened in the latest year to March 2012. These rising returns will also flow back to dairy farmers via Fonterra.

Table 3.14 presents the recent and longer-term contribution of Primary Production business units to the Central Otago District economy.

Table 3.14. Primary Production Business Units in Central Otago District, 2002 - 2012

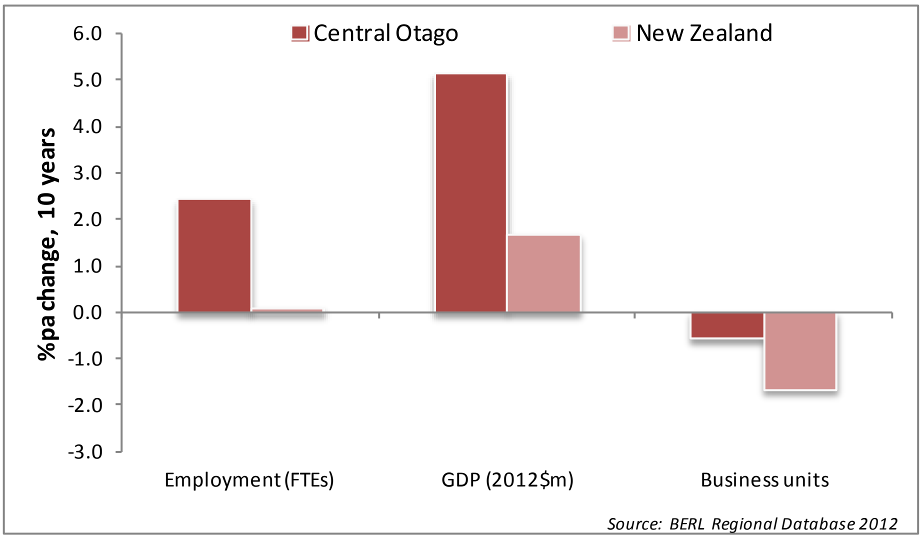
Primary production sector Business units	Year ending March				%pa change	
	2002	2010	2011	2012	2011 to 2012	2002 to 2012
Agriculture	882	838	824	803	-2.5	-0.9
Aquaculture	0	0	0	1	na	na
Services to Agriculture; Hunting and Trapping	77	106	102	108	5.9	3.4
Forestry and Logging	33	20	22	22	0.0	-4.0
Mining and services to mining	7	7	10	10	0.0	3.6
Primary production sector	**999**	**971**	**958**	**944**	**-1.5**	**-0.6**
Total business units: Central Otago	**2,422**	**3,277**	**3,297**	**3,280**	**-0.5**	**3.1**

Source: BERL Regional Database 2012

- In 2012, there was a 1.5 percent decline in business units in the Primary Production sector, resulting in 14 less units than in 2011.
- There was a contraction in Primary Production Sector business units over the last 10 years, with a decrease of 55 business units; in spite of the growth in the Services to Agriculture; Hunting and Trapping; and Mining and Services to Mining industries.

Figure 3.4 shows the change in employment, GDP and business units in the Primary Production sector in the Central Otago District and at a national level since 2002.

Figure 3.4. Primary Production sector growth, Central Otago District vs. New Zealand, 2002 - 2012



Although business units overall declined over the last decade, Central Otago District's employment, GDP and business unit growth in the Primary Production sector exceeded the national performance.

3.4.5 Primary Processing sector

In 2012, the Primary Processing sector employed 384 FTEs through 60 Business Units and contributed $55 million to GDP, in Central Otago.

The two industries that make up the sector are the Food, Beverage and Tobacco; and Wood and Paper Product Manufacturing industries. The Food, Beverage and Tobacco industry is the larger of the two, accounting for 76 percent of employment in the sector.

Table 3.15 presents the recent and longer-term contribution of Primary Processing employment to the Central Otago District economy.

Table 3.15. Primary Processing Employment, Central Otago District, 2002 - 2012

Primary processing sector Employment (FTEs)	Year ending March				%pa change	
	2002	2010	2011	2012	2011 to 2012	2002 to 2012
Food, Beverage and Tobacco	311	278	283	292	*3.2*	*-0.6*
Wood and Paper Product Manufacturing	75	76	82	92	*12.4*	*2.1*
Primary processing sector	**386**	**353**	**365**	**384**	***5.3***	***0.0***
Total employment: Central Otago	**7,200**	**9,856**	**9,966**	**10,103**	***1.4***	***3.4***

Source: BERL Regional Database 2012

- In 2012, the Primary Processing sector managed a 5.3 percent increase in employment, an increase of 19 FTEs.
- However, over the decade, employment in the sector had no change (that is, 0.0. percent per annum). This is lower than employment growth in the District of 3.4 percent per annum.

Table 3.16 presents the recent and longer-term contribution of Primary Processing GDP to the Central Otago District economy.

Table 3.16 Primary Processing GDP, Central Otago District, 2002 - 2012

Primary processing sector GDP (2012$m)	Year ending March				%pa change	
	2002	2010	2011	2012	2011 to 2012	2002 to 2012
Food, Beverage and Tobacco	33.0	36.8	37.3	39.1	*4.9*	*1.7*
Wood and Paper Product Manufacturing	9.5	12.7	13.8	16.1	*16.7*	*5.4*
Primary processing sector	**42.5**	**49.6**	**51.0**	**55.2**	***8.1***	***2.6***
Total GDP: Central Otago	**608.7**	**868.0**	**856.8**	**925.5**	***8.0***	***4.3***

Source: BERL Regional Database 2012

- GDP growth in the Primary Processing sector was 8.1 percent in 2012, whereas GDP in the District increased by 8.0 percent.
- Over the last decade, GDP in the sector has increased by 2.6 percent per annum compared to 4.3 percent per annum for the District.

Table 3.17 presents the recent and longer-term change in the Primary Processing sector's business units in the Central Otago District economy.

Table 3.17. Primary Processing Business Units, Central Otago District, 2002 - 2012

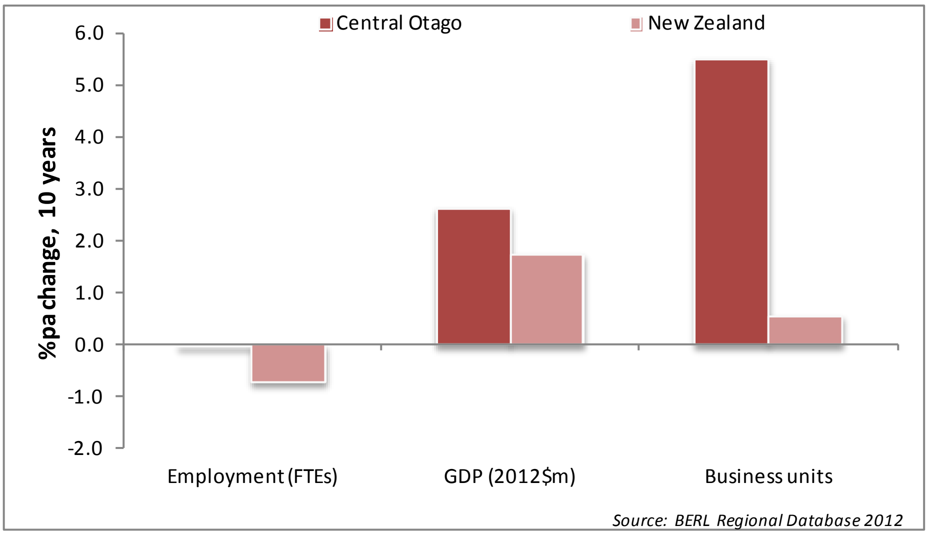
Primary processing sector Business units	Year ending March				%pa change	
	2002	2010	2011	2012	*2011 to 2012*	*2002 to 2012*
Food, Beverage and Tobacco	24	43	44	44	*0.0*	*6.2*
Wood and Paper Product Manufacturing	11	17	17	16	*-5.9*	*3.8*
Primary processing sector	**35**	**60**	**61**	**60**	***-1.6***	***5.5***
Total business units: Central Otago	**2,422**	**3,277**	**3,297**	**3,280**	***-0.5***	***3.1***

Source: BERL Regional Database 2012

- The number of establishments engaged in Primary Processing fell in the year to 2012.
- Over the last decade, the number of business units has grown from 35 to 60 units. This is an annual growth rate of 5.5 percent.

Figure 3.5 shows the change in employment, GDP and business units in the Primary Processing sector in the Central Otago District, and at a regional and national level since 2002.

Figure 3.5. Primary Processing sector growth, Central Otago District vs. New Zealand, 2002 - 2012



- Despite strong growth in business units, particularly wine manufacturers, employment and GDP performance in the Primary Processing sector has been weak.

3.4.6 Creative sector

The Creative sector is relatively small, with only 58 Business Units. The Creative sector contributed $2.9 million in GDP and 68 FTEs to the Central Otago District economy in 2012.[31]

Table 3.18 presents the recent and longer-term contribution of Creative sector employment to the Central Otago District economy.

Table 3.18. Creative sector Employment, Central Otago District, 2002 - 2012

Creative sector Employment (FTEs)	Year ending March				%pa change	
	2002	2010	2011	2012	*2011 to 2012*	*2002 to 2012*
Printing and publishing	22	37	46	42	*-8.6*	*6.7*
Arts and antiques market	3	2	3	0	*-100.0*	*-100.0*
Commercial services	8	12	14	12	*-19.4*	*3.4*
Film, video and television services	22	7	7	0	*-100.0*	*-100.0*
Music, creative and performing arts and venues	5	8	8	14	*70.3*	*11.0*
Creative sector	**60**	**66**	**78**	**68**	***-12.9***	***1.3***
Total employment: Central Otago	**7,200**	**9,856**	**9,966**	**10,103**	***1.4***	***3.4***

Source: BERL Regional Database 2012

- Employment in the Creative sector declined 12.9 percent in 2012. The sector also averaged 1.3 percent growth per annum over the last decade.
- Greatest employment growth in 2012 was in the Printing and Publishing; and the Music, Creative and Performing Arts and Venues industries. Over the last decade, the greatest growth has come from Printing and Publishing industry.

Table 3.19 presents the recent and longer-term contribution of Creative sector GDP to the Central Otago District economy.

Table 3.19. Creative sector GDP, Central Otago District, 2002 - 2012

Creative sector GDP (2012$ m)	Year ending March				%pa change	
	2002	2010	2011	2012	*2011 to 2012*	*2002 to 2012*
Printing and publishing	0.5	0.9	1.0	1.2	*16.2*	*9.0*
Arts and antiques market	0.1	0.2	0.2	0.0	*-100.0*	*-100.0*
Commercial services	0.9	0.3	0.5	0.5	*2.2*	*-4.4*
Film, video and television services	1.7	0.5	0.5	0.0	*-100.0*	*-100.0*
Music, creative and performing arts and venues	0.3	0.7	0.7	1.2	*84.5*	*15.2*
Creative sector	**3.5**	**2.4**	**2.9**	**3.0**	***2.9***	***-1.6***
Total GDP: Central Otago	**608.7**	**868.0**	**856.8**	**925.5**	***8.0***	***4.3***

Source: BERL Regional Database 2012

- At $3.0 million in 2012, GDP increased by 2.9 percent over 2011.
- Over the last decade, GDP in the Creative sector contracted by 1.6 percent per annum.

[31] Due to the small size of the Creative sector, caution should be used when comparing the industries within the sector but also their changes over time.

Table 3.20 presents the recent and longer-term change in Creative sector business units in the Central Otago District economy.

Table 3.20. Creative sector Business Units, Central Otago District, 2002 - 2012

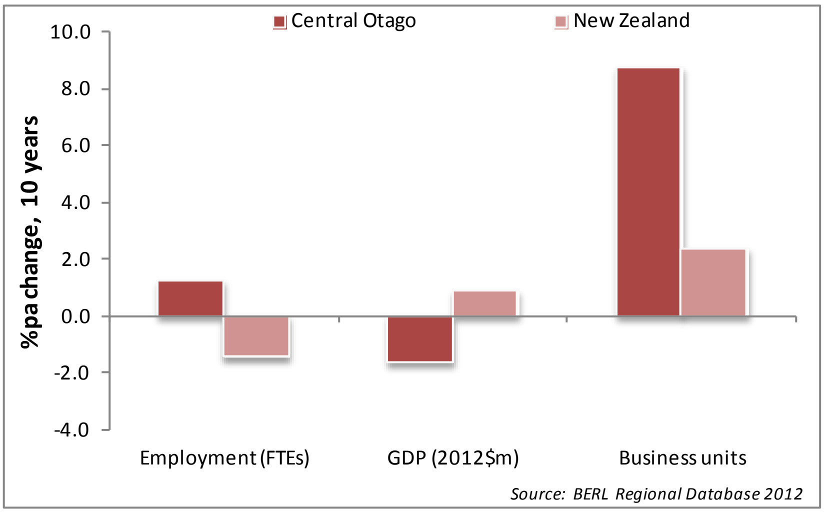
Creative sector Business units	Year ending March				%pa change	
	2002	2010	2011	2012	2011 to 2012	2002 to 2012
Printing and publishing	4	6	7	8	*14.3*	*7.2*
Arts and antiques market	2	3	4	6	*50.0*	*11.6*
Commercial services	8	26	27	24	*-11.1*	*11.6*
Film, video and television services	6	5	4	4	*0.0*	*-4.0*
Music, creative and performing arts and venues	5	15	15	16	*6.7*	*12.3*
Creative sector	**25**	**55**	**57**	**58**	***1.8***	***8.8***
Total business units: Central Otago	**2,422**	**3,277**	**3,297**	**3,280**	***-0.5***	***3.1***

Source: BERL Regional Database 2012

- The Creative Sector increased by one business unit in 2012.
- Over the last decade, the number of businesses has increased quite significantly from 25 to 58 business units. This is an average annual increase of 8.8 percent.

Figure 3.6 shows the average annual change in employment, GDP and business units in the Creative sector in the Central Otago District, and at a national level since 2002.

Figure 3.6. Creative sector growth, Central Otago District vs. New Zealand, 2002 - 2012



- Over the past decade, the GDP of the Creative sector in Central Otago District shrank.
- The Creative sector's employment, however, grew over the past decade at 1.3 percent per annum on average, and was above national trends.
- The highest growth in the Creative sector was in business units, which increased by more than 8 percent per annum, well above the national trend.

3.4.7 Education & Research sector

The Education & Research sector employed 511 FTEs in 2012 and contributed $27.4 million to Central Otago District's GDP. The largest industries within the sector are Primary and Secondary Education and Preschool Education which together account for close to 78 percent of employment and 72 percent of GDP in the sector.

Table 3.21 presents the recent and longer-term contribution of Education & Research employment to the Central Otago District economy.

Table 3.21. Education & Research Employment, Central Otago District, 2002 - 2012

Education & research sector Employment (FTEs)	Year ending March				%pa change	
	2002	2010	2011	2012	2011 to 2012	2002 to 2012
Preschool Education	21	94	96	97	*0.8*	*16.4*
Primary and Secondary Education	256	292	293	300	*2.3*	*1.6*
Higher Education	9	32	28	36	*27.6*	*14.2*
Other Education	7	40	19	28	*45.1*	*14.4*
Scientific Research	49	75	65	51	*-21.8*	*0.3*
Education & research sector	**343**	**532**	**501**	**511**	***1.9***	***4.1***
Total employment: Central Otago	**7,200**	**9,856**	**9,966**	**10,103**	***1.4***	***3.4***

Source: BERL Regional Database 2012

- In 2012, the Education & Research sector employed 511 FTEs, 10 more than in 2011. There were employment increases in all industries under this sector except in the Scientific Research industry.
- Over the last decade, employment in the sector has increased by an average of 4.1 percent per annum, faster than average employment growth in the District. There was faster growth in the Preschool Education; Higher Education; and Other Education industries.

Table 3.22 presents the recent and longer-term contribution of Education & Research GDP to the Central Otago District economy.

Table 3.22. Education & Research GDP, Central Otago District, 2002 - 2012

Education & Research sector GDP (2012$m)	Year ending March				%pa change	
	2002	2010	2011	2012	2011 to 2012	2002 to 2012
Preschool Education	1.4	4.6	4.7	4.8	*1.9*	*12.9*
Primary and Secondary Education	17.1	14.3	14.3	14.8	*3.4*	*-1.4*
Higher Education	0.6	1.6	1.4	1.8	*29.1*	*10.9*
Other Education	0.5	2.0	0.9	1.4	*46.7*	*11.0*
Scientific Research	5.0	6.9	5.9	4.7	*-20.6*	*-0.7*
Education & Research sector	**24.6**	**29.4**	**27.2**	**27.4**	***0.7***	***1.1***
Total GDP: Central Otago	**608.7**	**868.0**	**856.8**	**925.5**	***8.0***	***4.3***

Source: BERL Regional Database 2012

- In 2012, GDP grew by 0.7 percent. Despite substantial increases in GDP from the Higher Education and Other Education industries, the sector GDP growth was almost flat due to a decline in the GDP contribution from the Scientific Research industry.

- Over the past decade, GDP in the Education & Research sector increased by 1.1 percent per annum, led largely by GDP growth in the Other Education and Higher Education industries.

Table 3.23 presents the recent and longer-term change in Education & Research business units in the Central Otago District economy.

Table 3.23. Education & Research Business Units, Central Otago District, 2002 - 2012

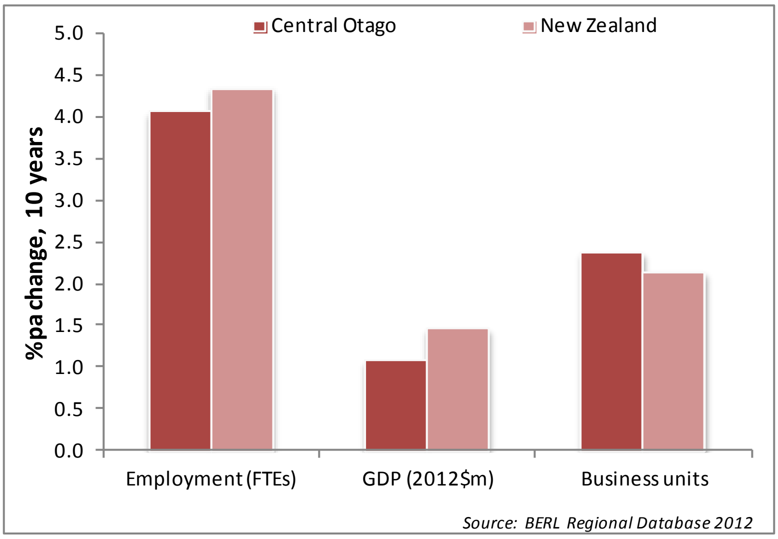
Education & research sector Business units	Year ending March				%pa change	
	2002	2010	2011	2012	2011 to 2012	2002 to 2012
Preschool Education	10	15	15	16	*6.7*	*4.8*
Primary and Secondary Education	19	17	17	17	*0.0*	*-1.1*
Higher Education	2	3	3	5	*66.7*	*9.6*
Other Education	6	8	6	10	*66.7*	*5.2*
Scientific Research	12	17	14	14	*0.0*	*1.6*
Education & research sector	**49**	**60**	**55**	**62**	***12.7***	***2.4***
Total business units: Central Otago	**2,422**	**3,277**	**3,297**	**3,280**	***-0.5***	***3.1***

Source: BERL Regional Database 2012

- The number of business units increased from 55 units in 2011 to 62 units in 2012.
- Over the last decade, the number of business units has increased by 2.4 percent per annum, a net increase of only 13 business units.

Figure 3.7 shows the change in employment, GDP and business units in the Education & Research sector in the Central Otago District, and at a regional and national level since 2002.

Figure 3.7. Education & Research sector key indicator growth, Central Otago District vs. New Zealand, 2002 - 2012



Employment and GDP growth in this sector have been below national trends over the past 10 years except for business unit growth, which is higher than the national average.

3.4.8 Engineering, Machinery & Equipment Manufacturing

The Engineering, Machinery & Equipment Manufacturing sector is small compared to other key sectors of the Central Otago District. In 2012, the sector employed 54 FTEs in 44 businesses and generated $5.2 million in GDP.

The two industries that make up the sector – Machinery and Equipment Manufacturing and Consultant Engineering Services are of similar size. However, growth over the decade has come from the Consultant Engineering Services industry.

Table 3.24 presents the recent and longer-term contribution of Engineering, Machinery & Equipment Manufacturing employment to the Central Otago District economy.

Table 3.24. Engineering, Machinery & Equipment Manufacturing Employment, Central Otago, 2002 - 2012

Engineering, machinery & equipment manufacturing sector Employment (FTEs)	Year ending March				%pa change	
	2002	2010	2011	2012	*2011 to 2012*	*2002 to 2012*
Machinery and Equipment Manufacturing	38	33	30	24	*-19.4*	*-4.3*
Consultant Engineering Services	23	29	29	29	*0.8*	*2.3*
Engineering, machinery & equipment manufacturing sector	**61**	**62**	**59**	**54**	***-9.5***	***-1.3***
Total Employment: Central Otago	**7,200**	**9,856**	**9,966**	**10,103**	***1.4***	***3.4***

Source: BERL Regional Database 2012

- Employment fell 9.5 percent or by five FTEs. Over the decade, the sector has decreased employment by seven FTEs, or 1.3 percent per annum. Employment growth in the sector is definitely lower than the employment growth in the district.

Table 3.25 presents the recent and longer-term contribution of Engineering, Machinery & Equipment Manufacturing GDP to the Central Otago District economy.

Table 3.25. Engineering, Machinery & Equipment Manufacturing GDP, Central Otago, 2002 - 2012

Engineering, Machinery & Equipment manufacturing sector GDP (2012$m)	Year ending March				%pa change	
	2002	2010	2011	2012	*2011 to 2012*	*2002 to 2012*
Machinery and Equipment Manufacturing	3.2	2.9	3.0	2.5	*-15.6*	*-2.4*
Consultant Engineering Services	2.4	2.7	2.7	2.7	*2.2*	*1.3*
Engineering, Machinery & Equipment manufacturing sector	**5.6**	**5.6**	**5.6**	**5.2**	***-7.2***	***-0.6***
Total GDP: Central Otago	**608.7**	**868.0**	**856.8**	**925.5**	***8.0***	***4.3***

Source: BERL Regional Database 2012

- In 2012, sector GDP was $5.2 million, down 7.2 percent from $5.6 million in 2011.
- Over the last decade, the sector has experienced decline in GDP of 0.6 percent per annum, below the District growth of 4.3 percent per annum. However, the Consultant Engineering Services industry has grown at 1.3 percent per annum over the last decade.

Table 3.26 presents the recent and longer-term change in Engineering, Machinery & Equipment Manufacturing business units in the Central Otago District economy.

Table 3.26. Engineering, Machinery & Equipment Manufacturing Business Units, Central Otago, 2002 - 2012

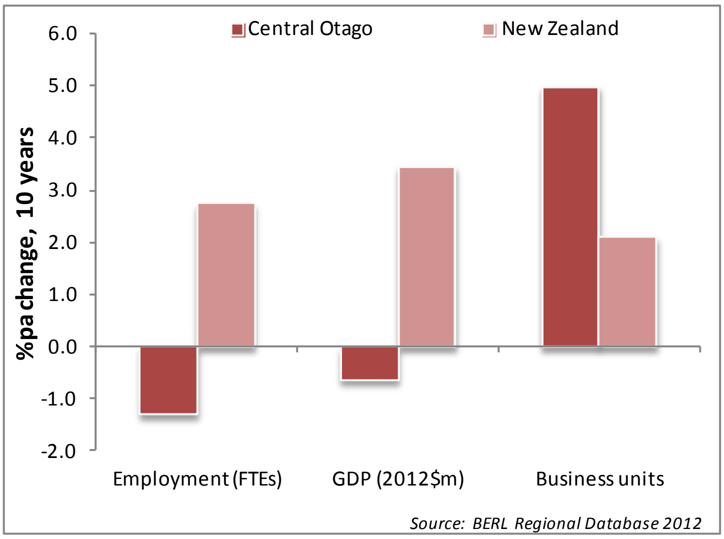
Engineering, machinery & equipment manufacturing sector Business units	Year ending March				%pa change	
	2002	2010	2011	2012	*2011 to 2012*	*2002 to 2012*
Machinery and Equipment Manufacturing	14	18	15	16	*6.7*	*1.3*
Consultant Engineering Services	13	24	30	28	*-6.7*	*8.0*
Engineering, machinery & equipment manufacturing sector	**27**	**42**	**45**	**44**	***-2.2***	***5.0***
Total Business units: Central Otago	**2,422**	**3,277**	**3,297**	**3,280**	***-0.5***	***3.1***

Source: BERL Regional Database 2012

- There was a decrease of one business unit in 2012.
- Over the last decade, there has been a net increase of 17 business units.

Figure 3.8 shows the change in employment, GDP and business units in the Engineering, Machinery & Equipment Manufacturing sector in the Central Otago District and at a national level from 2002 to 2012.

Figure 3.8. Engineering, Machinery & Equipment Manufacturing sector growth, Central Otago District vs. New Zealand, 2002 - 2012



Compared to national indicators, the Engineering, Machinery & Equipment Manufacturing sector has underperformed in relation to employment and GDP. However, the Sector's business units have grown at faster rate than nationally over the last decade.

4 Clutha District

4.1 Clutha District economy

Table 4.1 presents 2012 GDP, employment and the number of business units by sector.

Table 4.1. GDP, employment and business units, Clutha District, 2012

Sectors (2012)	FTEs	%	GDP (2012$m)	%	Business units	%
Primary	3,667	*41.3%*	336	*40.8%*	1,525	*50.8%*
Manufacturing	1,615	*18.2%*	220	*26.7%*	60	*2.0%*
Construction	660	*7.4%*	39	*4.8%*	163	*5.4%*
Wholesale and Distribution	333	*3.7%*	45	*5.5%*	96	*3.2%*
Retail Trade and Services	930	*10.5%*	53	*6.4%*	284	*9.5%*
Business Services	381	*4.3%*	46	*5.6%*	703	*23.4%*
Arts and Recreation Services	20	*0.2%*	1	*0.2%*	37	*1.2%*
Social Services	1,282	*14.4%*	84	*10.1%*	134	*4.5%*
Sub-total (excluding O.O.D.)	8,888	100.0%	825	100.0%	3,002	100.0%
*Owner-Occupied Dwellings**			107			
Total	**8,888**		**932**		**3,002**	

* Imputed value, included in Total GDP only

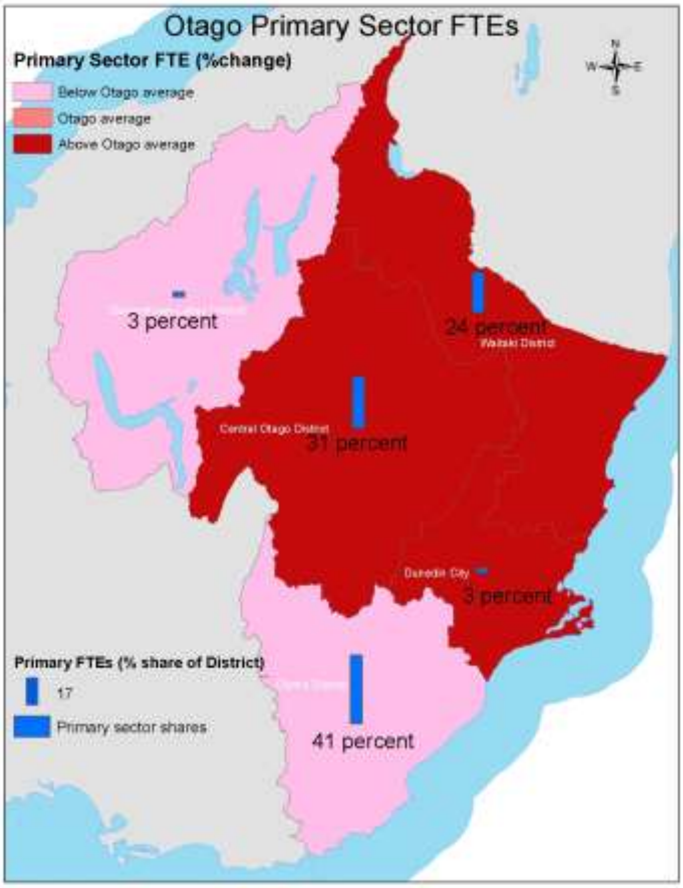
Source: BERL Regional Database, 2012

The Clutha District employed around 8,900 FTEs in 3,000 businesses, which generated GDP of $932 million in 2012.

The Primary sector is one of the District's largest sectors in employment terms, amongst other things. Across the five districts, Clutha also has the largest number of FTEs in the Primary sector (one third of the Region's total Primary sector employment) and the highest percent share (of a given district's total employment).

The Primary sector was the main driver of the local economy in 2012, accounting for 41 percent of employment, 41 percent of GDP and 51 percent of business units in the Clutha District.

Figure 4.1 Primary sector FTEs, Otago Region, 2012



4.2 Economic performance – Clutha District

Table 4.2 presents the Clutha District's key performance indicators relative to the Otago Region and country.

Table 4.2. Key performance indicators, Clutha District, 2012

Key Performance Indicators	%pa for 2012 year		
	Clutha	Otago Region	New Zealand
Resident population growth	**-1.1**	0.6	0.6
GDP growth	**7.7**	2.8	1.9
GDP per capita growth	**8.9**	2.2	1.3
Employment growth	**0.0**	0.7	1.0
Labour productivity growth	**8.9**	2.4	1.0
Business units growth	**0.2**	0.6	-0.2
Business size growth	**-0.2**	0.1	1.2

Source: BERL Regional Database, 2012

In the year to 2012, there was a 7.7 percent increase in GDP. This is in contrast to employment, which did not grow in 2012, and is below both regional and national growth rates. The largest contributor to GDP growth was the Agriculture, Forestry, and Fishing Support Services industry.

Over the past year, the Sheep-Beef Farming industry had a decrease of 45 FTEs as 24 business units were closed over this period. Despite this drop, the Clutha District's Shearing Services industry still generated employment for 73 FTEs. This led to a 0.0 percent growth in employment in the District in 2012.

Table 4.3 shows the key performance indicators for Clutha District, the Otago Region and New Zealand over the last ten years.

Table 4.3. Key performance indicators, Clutha District, 2002 to 2012

Key Performance Indicators	%pa for 2002 - 2012		
	Clutha	Otago Region	New Zealand
Resident population growth	**-0.1**	1.0	1.2
GDP growth	**1.9**	2.2	2.3
GDP per capita growth	**2.0**	1.2	1.1
Employment growth	**0.8**	1.8	1.8
Labour productivity growth	**1.3**	0.4	0.5
Business units growth	**0.6**	2.7	2.1
Business size growth	**0.2**	-0.8	-0.3

Source: BERL Regional Database, 2012

Over the last decade, Clutha District has grown in terms of GDP but growth was subdued in terms of employment and business units. A decline in population, combined with growing GDP, has seen GDP per capita grow at a rate faster than regionally and nationally.

4.3 Fastest growing industries - Clutha District

Table 4.4 presents the 10 fastest growing industries in the Clutha District by employment[32].

Table 4.4. Ten fastest growing industries by FTE growth, Clutha District, 2002 to 2012

Rank by FTE growth	Industry	Employment (FTEs) 2002	2012	%pa growth
1	Social Assistance Services	22	120	18.6
2	Public Order Safety and Regulatory Services	106	375	13.5
3	Hospitals	64	115	6.1
4	Construction Services	119	188	4.7
5	Residential Care Services	86	119	3.3
6	Accommodation	79	105	2.8
7	Professional Scientific and Technical Services (exc Comp Sys Dsn & related)	146	169	1.5
8	Agriculture	2,484	2,850	1.4
9	Repair and Maintenance	97	109	1.2
10	Heavy and Civil Engineering Construction	244	271	1.0

Source: BERL Regional Database, 2012

Over the ten years to 2012, employment grew fastest in industries related to social services, with Social Assistance Services; Public Order Safety and Regulatory Services; Hospitals; and Residential Care Services industries among the five fastest growing industries by FTE growth.

[32] Only includes industries within the district that have over 25 FTEs

4.4 Key sectors – Clutha District

This section presents the recent and longer-term contribution of employment, GDP and business units in the six key sectors in the Clutha District.

4.4.1 Tourism sector

Table 4.5 presents the contribution of the Tourism sector to employment, GDP and business units in the Clutha District in 2012.

Table 4.5. Contribution of tourism to Clutha District's economy, 2012

Role of tourism in local economy	Employment	%	GDP ($2012m)	%	Number of Business Units	%
Tourism-characteristic industries	109	*1.2%*	4.9	*0.5%*	46	*1.5%*
Tourism-related industries	43	*0.5%*	3.1	*0.3%*	10	*0.3%*
All non-tourism-related industries	53	*0.6%*	5.1	*0.5%*	17	*0.6%*
Clutha	**205**	***2.3%***	**13.2**	***1.4%***	**73**	***2.4%***
New Zealand	**102,453**	***5.5%***	**7,458.5**	***3.6%***	**20,739**	***4.1%***

Source: BERL Regional Database 2012

- Tourism in Clutha accounts for 205 FTEs within 73 business units and generates $13.2 million in GDP.
- Tourism activity is less than the national average, accounting for 2.3 percent of employment, 1.4 percent of GDP and 2.4 percent of business units.

Table 4.6 presents the recent and longer-term contribution of tourism employment to the Clutha District economy.

Table 4.6. Tourism Employment, Clutha District, 2002 - 2012

Tourism Employment (FTEs)	Years ending March				%pa change	
	2002	2010	2011	2012	2011 to 2012	2002 to 2012
Tourism-characteristic industries	96	153	155	109	-30.0	1.2
Tourism-related industries	41	58	59	43	-26.3	0.6
All non-tourism-related industries	44	70	73	53	-26.7	2.0
Tourism Sector	**181**	**281**	**286**	**205**	**-28.4**	**1.3**
Total Employment: Clutha	**8,231**	**8,629**	**8,891**	**8,888**	**0.0**	**0.8**

Source: BERL Regional Database 2012

- In 2012, there was a decrease in tourism employment in the Clutha District. Over the decade to 2012, tourism employment has increased by an average of 1.3 percent per annum, above the 0.8 percent employment growth in the Clutha District.

Table 4.7 presents the recent and longer-term contribution of tourism GDP to the Clutha District economy.

Table 4.7. Tourism GDP, Clutha District, 2002 – 2012

Tourism GDP (2012$m)	Years ending March				%pa change	
	2002	2010	2011	2012	2011 to 2012	2002 to 2012
Tourism-characteristic industries	5	6	7	5	-27.7	0.3
Tourism-related industries	2	4	4	3	-21.2	5.4
All non-tourism-related industries	4	7	7	5	-22.2	3.1
Tourism Sector	**10**	**17**	**17**	**13**	**-24.1**	**2.4**
Total GDP: Clutha	**769**	**871**	**866**	**932**	**7.7**	**1.9**

Source: BERL Regional Database 2012

- As with employment, tourism contribution to GDP decreased from $17 million in 2011 to $13 million in 2012.
- Over the last ten years, tourism's contribution to the District's GDP has increased from $10 million in 2002 to $13 million in 2012, an average annual decrease of 2.4 percent.

Table 4.8 presents the recent and longer-term change in tourism business units in the Clutha District economy.

Table 4.8. Tourism Business Units, Clutha District, 2002 - 2012

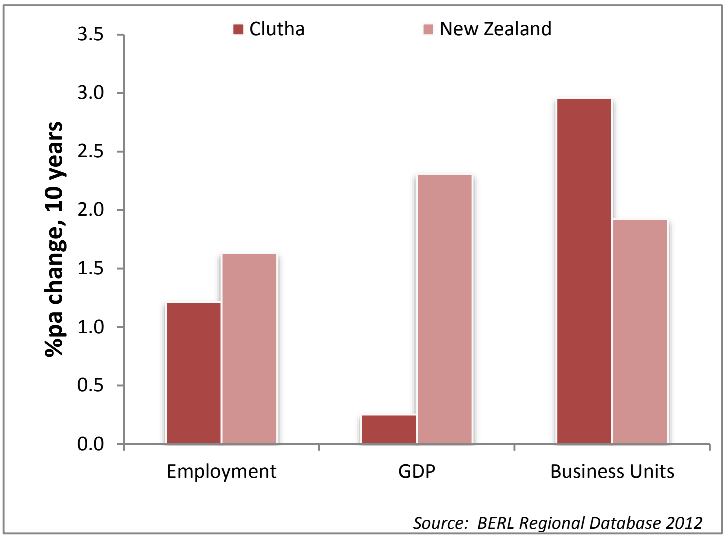
Tourism Business units	Years ending March				%pa change	
	2002	2010	2011	2012	2011 to 2012	2002 to 2012
Tourism-characteristic industries	34	61	61	46	-24.5	3.0
Tourism-related industries	10	13	13	10	-25.1	0.2
All non-tourism-related industries	15	24	24	17	-25.9	1.6
Tourism Sector	**59**	**98**	**98**	**73**	**-24.9**	**2.2**
Total Business Units: Clutha	**2,839**	**3,043**	**2,996**	**3,002**	**0.2**	**0.6**

Source: BERL Regional Database 2012

- In 2012, there was a decrease of 25 business units related to the Tourism sector units.
- Over the last ten years, the number of tourist businesses has increased from 59 in 2002 to 73 in 2012, an increase of 2.2 percent per annum.

Figure 4.2 shows the change in employment, GDP and business units in the Tourism sector in the Clutha District and nationally between 2002 and 2012.

Figure 4.2. Tourism sector growth, Clutha District vs. New Zealand, 2002 - 2012



Tourism in the Clutha District has increased across the three indicators. Its growths were slower than the national averages for employment and GDP but not in business units in the ten years to 2012.

4.4.2 Primary Production sector

Primary Production is a significant sector in the Clutha District. It accounts for 41 percent of FTE employment, 41 percent of GDP, and 51 percent of business units.

Table 4.9 presents the recent and longer-term contribution of Primary Production employment to the Clutha District economy.

Table 4.9. Primary Production Employment, Clutha District, 2002 - 2012

Primary production sector Employment (FTEs)	Year ending March				%pa change	
	2002	2010	2011	2012	2011 to 2012	2002 to 2012
Agriculture	2,484	2,779	2,994	2,850	-4.8	1.4
Aquaculture	0	0	0	0	na	na
Services to Agriculture; Hunting and Trapping	617	524	517	622	20.1	0.1
Forestry and Logging	147	134	151	145	-3.9	-0.1
Mining and services to mining	78	44	35	50	41.7	-4.3
Primary production sector	**3,326**	**3,481**	**3,698**	**3,667**	**-0.8**	**1.0**
Total employment: Clutha District	**8,231**	**8,629**	**8,891**	**8,888**	**0.0**	**0.8**

Source: BERL Regional Database 2012

- In 2012, employment in the Primary Production sector decreased by 0.8 percent, largely because of the Forestry and logging and Agriculture industries.
- Over the last decade, the Primary Production sector added 341 FTEs, an average annual increase of 1.0 percent. This is slightly above the District's average employment growth rate.

Table 4.10 presents the recent and longer-term contribution of Primary Production GDP to the Clutha District economy.

Table 4.10. Primary Production GDP, Clutha District, 2002 - 2012

Primary Production sector GDP (2012$m)	Year ending March				%pa change	
	2002	2010	2011	2012	2011 to 2012	2002 to 2012
Agriculture	147.1	180.5	170.8	214.0	25.3	3.8
Aquaculture	0.0	0.0	0.0	0.0	na	na
Services to Agriculture; Hunting and Trapping	36.5	34.0	30.9	46.7	51.0	2.5
Forestry and Logging	48.4	65.0	73.8	72.4	-1.9	4.1
Mining and services to mining	16.4	4.0	3.1	3.4	11.0	-14.5
Primary Production sector	**248.3**	**283.5**	**278.6**	**336.4**	**20.8**	**3.1**
Total GDP: Clutha District	**769.3**	**871.4**	**865.5**	**932.0**	**7.7**	**1.9**

Source: BERL Regional Database 2012

- In 2012, GDP in the Primary Production sector increased by $57.8 million, a 20.8 percent increase. There were significant increases in the Services to Agriculture, Hunting and Trapping; and Agriculture industries.
- Over the decade, the Primary Production sector has grown from $248.3 million to $336.4 million, a growth rate of 3.1 percent per annum. The main contributors to this growth came from the Forestry and Logging; Agriculture; and Services to Agriculture, Hunting and Trapping industries.

Table 4.11 presents the recent and longer-term change in Primary Production sector business units in the Clutha District economy.

Table 4.11. Primary Production Business Units, Clutha District, 2002 - 2012

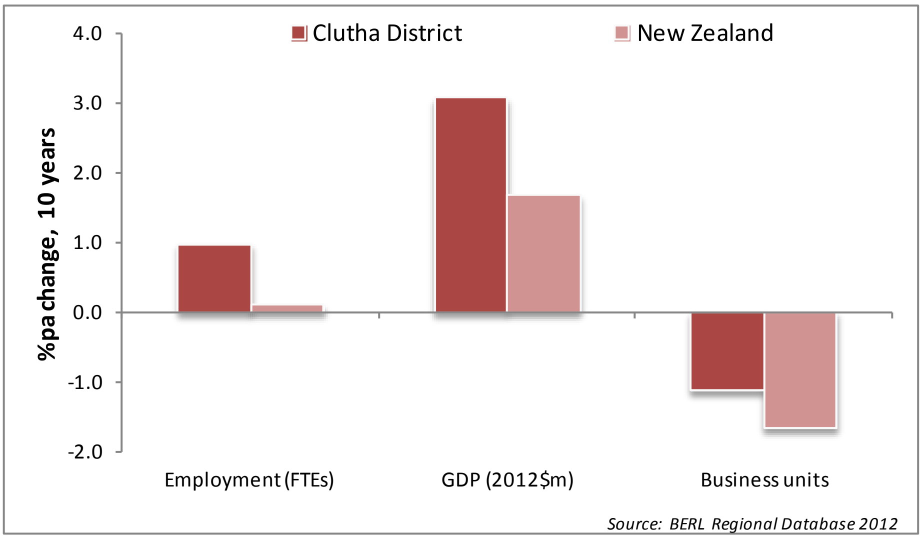
Primary production sector Business units	Year ending March				%pa change	
	2002	2010	2011	2012	2011 to 2012	2002 to 2012
Agriculture	1,446	1,281	1,243	1,237	-0.5	-1.5
Aquaculture	0	1	1	1	0.0	na
Services to Agriculture; Hunting and Trapping	120	138	128	134	4.7	1.1
Forestry and Logging	138	154	152	148	-2.6	0.7
Mining and services to mining	4	6	5	5	0.0	2.3
Primary production sector	**1,708**	**1,580**	**1,529**	**1,525**	**-0.3**	**-1.1**
Total business units: Clutha District	**2,839**	**3,043**	**2,996**	**3,002**	**0.2**	**0.6**

Source: BERL Regional Database 2012

- In 2012, there were 1,525 business units in the Primary Production sector in the Clutha District, four less than last year. The decline was due to the Forestry and Logging; and Agriculture industry.
- Over the decade however, there has been business unit growth in all industries apart from Agriculture, where there are 209 less businesses than in 2002. Being the largest industry in the Primary Production sector, this has seen an average annual decline in business units of 1.1 percent.

Figure 4.3 shows the change in employment, GDP and business units in the Primary Production sector in the Clutha District and nationally between 2002 and 2012.

Figure 4.3. Primary Production sector growth, Clutha District vs. New Zealand, 2002 - 2012



- The Clutha District's Primary Production sector performed better than the sector nationally across all indicators. In particular, GDP has grown at close to two times the national rate.

4.4.3 Primary Processing sector

The Primary Processing sector accounts for 15 percent of employment and 23 percent of GDP in the Clutha District. The major industry within the sector is Food, Beverage and Tobacco, which accounts for 82 percent of employment and 78 percent of GDP in the Primary Processing sector.

Table 4.12 presents the recent and longer-term contribution of employment in the Primary Processing sector to the Clutha District economy.

Table 4.12. Primary Processing Employment, Clutha District, 2002 - 2012

Primary processing sector Employment (FTEs)	Year ending March				%pa change	
	2002	2010	2011	2012	*2011 to 2012*	*2002 to 2012*
Food, Beverage and Tobacco	1,277	1,174	1,120	1,131	*1.0*	*-1.2*
Wood and Paper Product Manufacturing	417	232	250	239	*-4.3*	*-5.4*
Primary processing sector	**1,693**	**1,405**	**1,370**	**1,371**	***0.1***	***-2.1***
Total employment: Clutha District	**8,231**	**8,629**	**8,891**	**8,888**	***0.0***	***0.8***

Source: BERL Regional Database 2012

- In 2012, there was almost no change in employment in the Primary Processing sector with just a one FTE increase from 2011,up 0.1 percent. This was driven by the increase in the Food, Beverage and Tobacco industry FTEs being close to the decrease in the number of FTEs in the Wood and Paper Product Manufacturing industry.

- Over the decade, the Primary Processing sector has lost 322 FTEs. Much of this has occurred in the Wood and Paper Product Manufacturing industry, where 178 FTEs have been lost. The Food, Beverage and Tobacco industry has also lost 146 FTE jobs over the same period.

Table 4.13 presents the recent and longer-term contribution of Primary Processing sector GDP to the Clutha District economy.

Table 4.13. Primary Processing GDP, Clutha District, 2002 - 2012

Primary processing sector GDP (2012$m)	Year ending March				%pa change	
	2002	2010	2011	2012	*2011 to 2012*	*2002 to 2012*
Food, Beverage and Tobacco	135.6	155.5	147.4	151.3	*2.6*	*1.1*
Wood and Paper Product Manufacturing	52.8	39.1	42.2	42.0	*-0.7*	*-2.3*
Primary processing sector	**188.5**	**194.6**	**189.6**	**193.2**	***1.9***	***0.2***
Total GDP: Clutha District	**769.3**	**871.4**	**865.5**	**932.0**	***7.7***	***1.9***

Source: BERL Regional Database 2012

- In 2012, the Primary Processing sector contributed GDP of $193.2 million, which was $3.6 million more than in 2011. The increase occurred in the Food, Beverage and Tobacco industry, where GDP increased by $3.9 million. In contrast, the Wood and Paper Product Manufacturing industry decreased GDP by $0.2 million.
- Over the decade, the Primary Processing sector has seen GDP increase by an average of 0.2 percent per annum.

Table 4.14 presents the recent and longer-term change in Primary Processing business units in the Clutha District economy.

Table 4.14. Primary Processing Business Units, Clutha District, 2002 - 2012

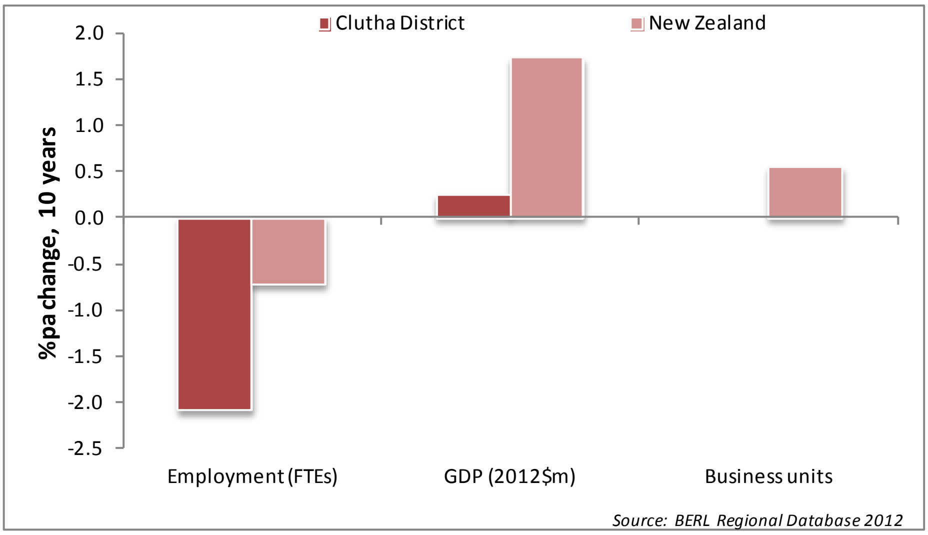
Primary processing sector Business units	Year ending March				%pa change	
	2002	2010	2011	2012	*2011 to 2012*	*2002 to 2012*
Food, Beverage and Tobacco	7	10	9	9	*0.0*	*2.5*
Wood and Paper Product Manufacturing	18	17	17	16	*-5.9*	*-1.2*
Primary processing sector	**25**	**27**	**26**	**25**	***-3.8***	***0.0***
Total business units: Clutha District	**2,839**	**3,043**	**2,996**	**3,002**	***0.2***	***0.6***

Source: BERL Regional Database 2012

- The number of business units in the sector has remained at 25 over the decade.

Figure 4.4 shows the change in employment, GDP and business units in the Primary Processing sector in the Clutha District and nationally between 2002 and 2012.

Figure 4.4. Primary Processing sector growth, Clutha District vs. New Zealand, 2002 - 2012



- The District's performance in the Primary Processing sector has weakened over the past 10 years both in absolute terms but also in relation to national activity.

4.4.4 Creative sector

The Creative sector contributed $3.1 million in GDP, and employed 78 FTEs in the Clutha District in 2012. Printing and Publishing is the largest industry within the sector, accounting for around 94 percent of employment and 84 percent of GDP in the sector.

Table 4.15 presents the recent and longer-term contribution of Creative sector employment to the Clutha District economy.

Table 4.15. Creative sector Employment, Clutha District, 2002 - 2012

Creative sector Employment (FTEs)	Year ending March				%pa change	
	2002	2010	2011	2012	2011 to 2012	2002 to 2012
Printing and publishing	55	68	81	73	*-10.7*	*2.7*
Arts and antiques market	3	0	0	3	*na*	*-2.4*
Commercial services	3	0	3	3	*0.8*	*0.5*
Film, video and television services	0	3	3	0	*-100.0*	*na*
Music, creative and performing arts and venues	5	0	2	0	*-100.0*	*-100.0*
Creative sector	**66**	**71**	**89**	**78**	***-12.5***	***1.7***
Total employment: Clutha District	**8,231**	**8,629**	**8,891**	**8,888**	***0.0***	***0.8***

Source: BERL Regional Database 2012

- In 2012, employment in the Creative sector was 78 FTEs, down 12.5 percent since 2011.
- Over the last decade, employment has increased by 12 FTEs, mainly due to increased employment in the Printing and Publishing industry.

Table 4.16 presents the recent and longer-term contribution of Creative sector GDP to the Clutha District economy.

Table 4.16. Creative sector GDP, Clutha District, 2002 – 2012

Creative sector GDP (2012$ m)	Year ending March				%pa change	
	2002	2010	2011	2012	*2011 to 2012*	*2002 to 2012*
Printing and publishing	1.5	2.4	2.5	2.6	*6.5*	*5.7*
Arts and antiques market	0.1	0.0	0.0	0.2	*na*	*2.1*
Commercial services	0.3	0.0	0.3	0.3	*2.2*	*-0.5*
Film, video and television services	0.0	0.2	0.2	0.0	*-100.0*	*na*
Music, creative and performing arts and venues	0.3	0.0	0.2	0.0	*-100.0*	*-100.0*
Creative sector	**2.3**	**2.6**	**3.1**	**3.1**	***-0.3***	***3.2***
Total GDP: Clutha District	**769.3**	**871.4**	**865.5**	**932.0**	***7.7***	***1.9***

Source: BERL Regional Database 2012

- In 2012, the Creative sector generated GDP of $3.1 million, down 0.3 percent from 2011.
- Over the decade, the Creative sector has increased GDP by 3.2 percent per annum.

Table 4.17 presents the recent and longer-term change in Creative sector business units in the Clutha District economy.

Table 4.17. Creative sector Business Units, Clutha District, 2002 - 2012

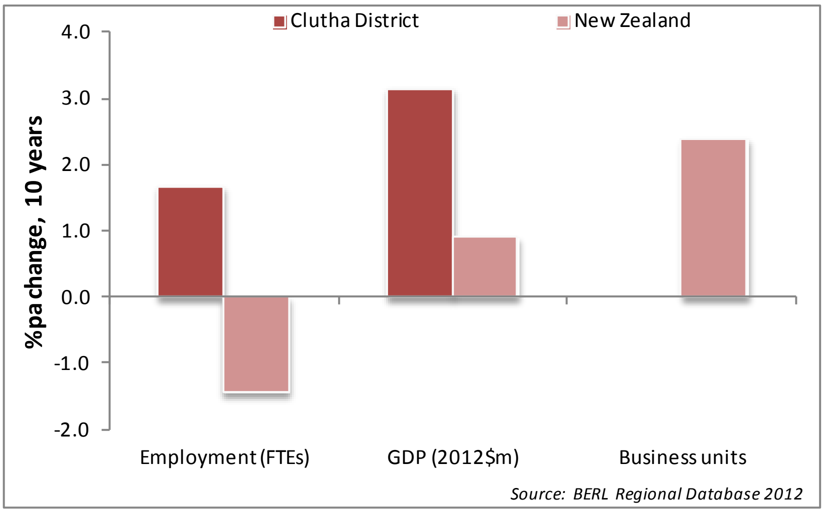
Creative sector Business units	Year ending March				%pa change	
	2002	2010	2011	2012	*2011 to 2012*	*2002 to 2012*
Printing and publishing	3	5	5	5	*0.0*	*5.2*
Arts and antiques market	5	3	3	5	*66.7*	*0.0*
Commercial services	3	3	4	3	*-25.0*	*0.0*
Film, video and television services	0	3	4	2	*-50.0*	*na*
Music, creative and performing arts and venues	8	4	3	4	*33.3*	*-6.7*
Creative sector	**19**	**18**	**19**	**19**	***0.0***	***0.0***
Total business units: Clutha District	**2,839**	**3,043**	**2,996**	**3,002**	***0.2***	***0.6***

Source: BERL Regional Database 2012

- In 2012, there were 19 business units in the Creative sector, the same number of businesses as in 2011. This is the same distribution from 2011.

Figure 4.5 shows the change in employment, GDP and business units in the Creative sector in the Clutha District and nationally between 2002 and 2012.

Figure 4.5. Creative sector growth, Clutha District vs. New Zealand, 2002 - 2012



- Over the last decade, the Creative sector has performed significantly better than the national average in terms of employment and GDP growth, albeit off a small activity base. Business unit growth in the sector over the decade was lower than the national equivalent.

4.4.5 Education & Research sector

The Education & Research sector is relatively small, accounting for 4.5 percent of employment and 2.4 percent of GDP in the Clutha District. There is no activity in the Science and Research industry within the sector. The Primary and Secondary Education industry accounts for around 76 percent of employment and GDP within the sector. The activity within the Primary and Secondary Education industry has been declining over the last decade.

Table 4.18 presents the recent and longer-term contribution of Education & Research employment to the Clutha District economy.

Table 4.18. Education & Research Employment, Clutha District, 2002 - 2012

Education & research sector Employment (FTEs)	Year ending March				%pa change	
	2002	2010	2011	2012	2011 to 2012	2002 to 2012
Preschool Education	30	64	61	66	*7.9*	*8.3*
Primary and Secondary Education	352	309	324	300	*-7.4*	*-1.6*
Higher Education	0	93	58	21	*-63.2*	*na*
Other Education	14	5	9	9	*0.8*	*-4.4*
Scientific Research	0	0	0	0	*na*	*na*
Education & research sector	**396**	**471**	**453**	**397**	***-12.4***	***0.0***
Total employment: Clutha District	**8,231**	**8,629**	**8,891**	**8,888**	***0.0***	***0.8***

Source: BERL Regional Database 2012

- In 2012, the Education & Research sector employed 397 FTEs, a decline of 56 FTEs from 2011. In particular, there was a 37 FTE drop in employment in the Higher Education industry.

- Over the last decade, employment growth has been driven by Preschool Education, which has grown 8.3 percent per annum. The Higher Education industry employed no FTEs in 2002 and now has 21 FTEs.

Table 4.19 presents the recent and longer-term contribution of Education & Research GDP to the Clutha District economy.

Table 4.19. Education & Research GDP, Clutha District, 2002 - 2012

Education & research sector GDP (2012$m)	Year ending March				%pa change	
	2002	2010	2011	2012	2011 to 2012	2002 to 2012
Preschool Education	2.0	3.2	3.0	3.3	*9.2*	*5.1*
Primary and Secondary Education	23.5	15.2	15.8	14.8	*-6.4*	*-4.5*
Higher Education	0.0	4.6	2.9	1.1	*-62.8*	*na*
Other Education	1.0	0.2	0.4	0.5	*1.9*	*-7.2*
Scientific Research	0.0	0.0	0.0	0.0	*na*	*na*
Education & research sector	**26.4**	**23.2**	**22.1**	**19.6**	***-11.4***	***-3.0***
Total GDP: Clutha District	**769.3**	**871.4**	**865.5**	**932.0**	***7.7***	***1.9***

Source: BERL Regional Database 2012

- GDP in the Education & Research sector has dropped in 2012 and over the past decade.

Table 4.20 presents the recent and longer-term change in Education & Research business units in the Clutha District economy.

Table 4.20. Education & Research Business Units, Clutha District, 2002 - 2012

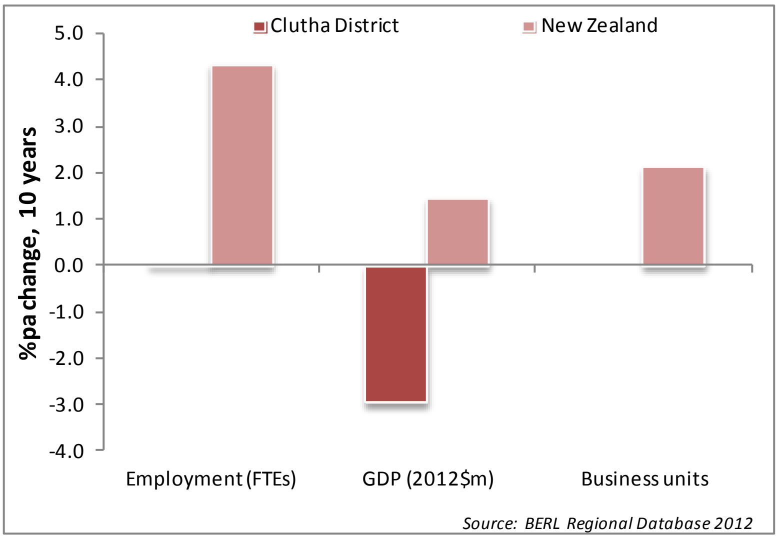
Education & research sector Business units	Year ending March				%pa change	
	2002	2010	2011	2012	2011 to 2012	2002 to 2012
Preschool Education	16	19	17	18	*5.9*	*1.2*
Primary and Secondary Education	25	24	24	24	*0.0*	*-0.4*
Higher Education	0	2	2	2	*0.0*	*na*
Other Education	7	5	4	5	*25.0*	*-3.3*
Scientific Research	1	1	0	0	*na*	*-100.0*
Education & research sector	**49**	**51**	**47**	**49**	***4.3***	***0.0***
Total business units: Clutha District	**2,839**	**3,043**	**2,996**	**3,002**	***0.2***	***0.6***

Source: BERL Regional Database 2012

- Business Units have increased in 2012, up by 4.3 percent, whereas the number of business units over the past decade has remained the same at 49.

Figure 4.6 shows the change in employment, GDP and business units in the Education & Research sector in the Clutha District and nationally between 2002 and 2012.

Figure 4.6. Education & Research sector growth, Clutha District vs. New Zealand, 2002 - 2012



Since 2002, the Education & Research sector in the Clutha District has experienced relatively flat employment and business unit change over the past ten years, while GDP declined by 3.0 percent per annum.

4.4.6 Engineering, Machinery & Equipment Manufacturing

The Engineering, Machinery & Equipment Manufacturing sector employed 77 FTEs in 15 business units and generated $7.6 million in GDP in the Clutha District in 2012. Table 4.21 presents the recent and longer-term Engineering, Machinery & Equipment Manufacturing in the Clutha District economy.

Table 4.21. Engineering, Machinery & Equipment Manufacturing Employment, Clutha District, 2002 - 2012

Engineering, machinery & equipment manufacturing sector Employment (FTEs)	Year ending March				%pa change	
	2002	2010	2011	2012	2011 to 2012	2002 to 2012
Machinery and Equipment Manufacturing	22	44	47	48	0.8	8.3
Consultant Engineering Services	14	29	24	29	20.9	7.7
Engineering, machinery & equipment manufacturing sector	**35**	**72**	**72**	**77**	**7.6**	**8.1**
Total Employment: Clutha District	**8,231**	**8,629**	**8,891**	**8,888**	**0.0**	**0.8**

Source: BERL Regional Database 2012

- In 2012, employment was up five FTEs since 2011 to 77 FTEs. Employment in the Machinery and Equipment Manufacturing industry was up by one FTE, while employment in the Consultant Engineering Services was up by five FTEs.
- Employment growth in this sector over the decade of 8.1 percent per annum was significantly higher than District's average employment growth, and relatively evenly spread across the two industries.

Table 4.22 presents the recent and longer-term contribution of Engineering, Machinery & Equipment Manufacturing GDP to the Clutha District economy.

Table 4.22. Engineering, Machinery & Equipment Manufacturing GDP, Clutha District, 2002 - 2012

Engineering, machinery & equipment manufacturing sector GDP (2012$m)	Year ending March				%pa change	
	2002	2010	2011	2012	*2011 to 2012*	*2002 to 2012*
Machinery and Equipment Manufacturing	1.8	3.8	4.7	5.0	*5.5*	*10.5*
Consultant Engineering Services	1.4	2.7	2.2	2.7	*22.7*	*6.7*
Engineering, machinery & equipment manufacturing sector	**3.2**	**6.5**	**6.9**	**7.7**	***11.0***	***9.0***
Total GDP: Clutha District	**769.3**	**871.4**	**865.5**	**932.0**	***7.7***	***1.9***

Source: BERL Regional Database 2012

- In 2012, GDP was up slightly to $7.7 million, driven by growth in the Consultant and Engineering Services industry.
- Over the decade, the sector has grown from $3.2 million to $7.7 million in 2012, an average annual increase of 9.0 percent.

Table 4.23 presents the recent and longer-term change in Engineering, Machinery & Equipment Manufacturing business units in the Clutha District economy.

Table 4.23. Engineering, Machinery & Equipment Manufacturing Business Units, Clutha District, 2002 - 2012

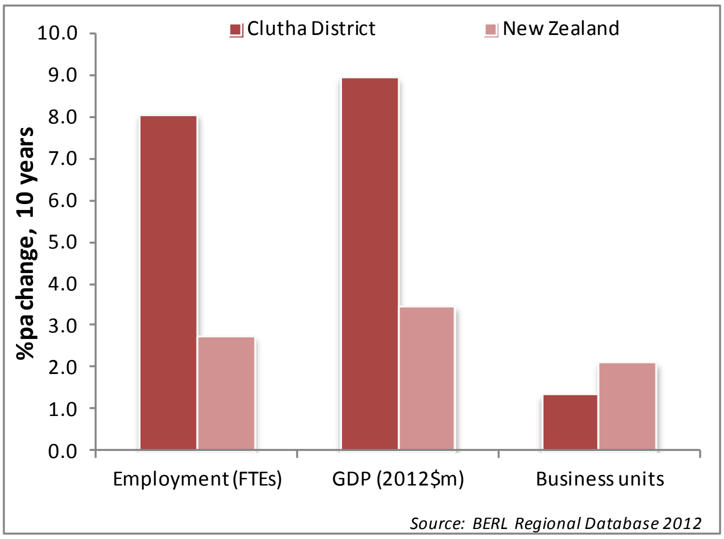
Engineering, machinery & equipment manufacturing sector Business units	Year ending March				%pa change	
	2002	2010	2011	2012	*2011 to 2012*	*2002 to 2012*
Machinery and Equipment Manufacturing	12	7	7	7	*0.0*	*-5.2*
Consultant Engineering Services	2	6	8	9	*12.5*	*16.2*
Engineering, machinery & equipment manufacturing sector	**14**	**13**	**15**	**16**	***6.7***	***1.3***
Total Business units: Clutha District	**2,839**	**3,043**	**2,996**	**3,002**	***0.2***	***0.6***

Source: BERL Regional Database 2012

- There was an increase of one business unit in the Machinery & Equipment Manufacturing sector, which came from the Consultant and Engineering Services industry.
- The number of business units has grown over the decade.

Figure 4.7 shows the change in employment, GDP and business units in the Engineering, Machinery & Equipment Manufacturing sector in the Clutha District and nationally between 2002 and 2012.

Figure 4.7. Engineering, Machinery & Equipment Manufacturing sector growth, Clutha District vs. New Zealand, 2002 - 2012



Over the past decade, the Machinery & Equipment Manufacturing sector had excellent gains in employment and GDP and a slight gain in business units. This suggests growth in the size of businesses in the sector.

5 Dunedin City

5.1 Dunedin City economy

Table 5.1 summarises GDP, number of FTEs and business units in 2012 by sector in Dunedin City.

Table 5.1. GDP, employment and business units, Dunedin City, 2012

Sectors (2012)	FTEs	%	GDP (2012$m)	%	Business units	%
Primary	1,344	*2.7%*	142	*3.5%*	967	*9.1%*
Manufacturing	3,790	*7.5%*	470	*11.6%*	460	*4.3%*
Construction	4,390	*8.7%*	261	*6.4%*	1,002	*9.4%*
Wholesale and Distribution	4,186	*8.3%*	547	*13.4%*	761	*7.1%*
Retail Trade and Services	10,592	*21.0%*	575	*14.1%*	1,955	*18.3%*
Business Services	8,164	*16.2%*	905	*22.3%*	4,150	*38.9%*
Arts and Recreation Services	1,313	*2.6%*	88	*2.2%*	273	*2.6%*
Social Services	16,614	*33.0%*	1,077	*26.5%*	1,090	*10.2%*
Sub-total (excluding O.O.D.)	50,393	100.0%	4,065	100.0%	10,658	100.0%
*Owner-Occupied Dwellings**			777			
Total	**50,393**		**4,842**		**10,658**	

* Imputed value, included in Total GDP only

Source: BERL Regional Database, 2012

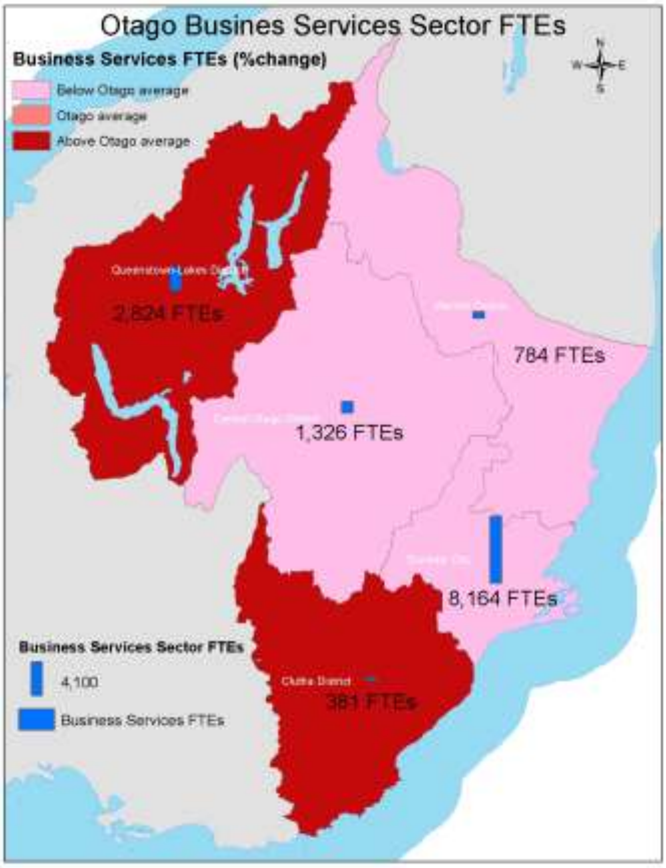
Dunedin City employs 50,393 FTEs in 10,658 businesses and generates $4.84 billion in GDP.

The Business Services sector is a major contributor to economic activity in the City, particularly in terms of GDP and business units, and this sector is the City's third largest employer.

Dunedin City has the highest number of FTEs employed in the Business Services sector (8,164 FTEs in 2012) – across the five territorial authorities – in the Otago Region.

Figure 5.1 shows the number of FTEs in 2012, by district, in the Business services sector. The Figure also shows the relative employment growth rate at a district level compared to the overall regional growth rate for this sector.

Figure 5.1. Business services sector FTEs, Otago Region, 2012



5.2 Economic performance – Dunedin City

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

Table 5.2. Key performance indicators, Dunedin City, 2012

Key Performance Indicators	%pa for 2012 year		
	Dunedin City	Otago Region	New Zealand
Resident population growth	**0.7**	0.6	0.6
GDP growth	**-0.4**	2.8	1.9
GDP per capita growth	**-1.1**	2.2	1.3
Employment growth	**-0.6**	0.7	1.0
Labour productivity growth	**0.0**	2.4	1.0
Business units growth	**0.2**	0.6	-0.2
Business size growth	**-0.9**	0.1	1.2

Source: BERL Regional Database, 2012

Dunedin City GDP decreased by 0.4 percent, with employment contracting by 0.6 percent. This resulted in no growth in labour productivity. The declines were brought about by the Construction; Manufacturing; and Social Services industries.

In spite of increases in employment in the Social Services sector, particularly in Hospitals (Except Psychiatric Hospitals); and Aged Care Residential Services, employment growth in the sector contracted due to substantial decreases in FTEs in the Secondary Education; Higher Education; and Other Social Assistance Services industries. These fall under the Social Services sector.

GDP growth lagged behind the regional and national GDP growths. The same thing is true with the employment growth and business growth.

Table 5.3 shows the change in key performance indicators in Dunedin City over the last ten years compared to the region and nationally.

Table 5.3. Key performance indicators, Dunedin City, 2002 to 2012

Key Performance Indicators	%pa for 2002 - 2012		
	Dunedin City	Otago Region	New Zealand
Resident population growth	**0.5**	1.0	1.2
GDP growth	**1.2**	2.2	2.3
GDP per capita growth	**0.6**	1.2	1.1
Employment growth	**1.1**	1.8	1.8
Labour productivity growth	**-0.1**	0.4	0.5
Business units growth	**1.8**	2.7	2.1
Business size growth	**-0.6**	-0.8	-0.3

Source: BERL Regional Database, 2012

While there has been some growth in key indicators, as shown in the Table above, overall Dunedin City has lagged behind the Region and New Zealand on average over the last decade.

5.3 Fastest-growing industries - Dunedin City

Table 5.4 presents the 10 fastest growing industries by employment in the ten years to 2012.[33]

Table 5.4. Ten fastest growing industries by FTE growth, Dunedin City, 2002 to 2012

Rank by FTE growth	Industry	Employment (FTEs) 2002	2012	%pa growth
1	Medical and Other Health Care Services	462	1,452	12.1
2	Tertiary Education	1,490	4,139	10.8
3	Adult Community and Other Education	95	229	9.2
4	Library and Other Information Services	54	129	9.1
5	Building Construction	443	985	8.3
6	Social Assistance Services	671	1,323	7.0
7	Heritage Activities	228	418	6.2
8	Electricity Supply	90	153	5.5
9	Professional Scientific and Technical Services (exc Comp Sys Dsn & related)	1,800	2,912	4.9
10	Transport Support Services	358	565	4.7

Source: BERL Regional Database, 2012

In the ten years to 2012, Medical and Other Health Care Services had the fastest FTE growth rate. Since 2002, the industry has more than tripled its employment. Also showing remarkable growth over the past decade were the Tertiary Education, Adult Community and Other Education industries, which, just like the Medical and Other Health Care Services, belong to the Social Services sector.

[33] The industry comparison covers industries that employ over 100 FTEs.

The Library and Other Information Services; and Building Construction industries other two industries were the fourth and fifth fastest growing industries over the past ten years.

In 2012, the top three largest areas of employment in Dunedin City are the Tertiary Education (4,139 FTEs), Hospitals (3,098 FTEs) and Professional Scientific and Technical Services (2,912 FTEs) industries. However, it is only the Tertiary Education industry that has been consistently in the top ten, over the decade period.

5.4 Key sectors – Dunedin City

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

5.4.1 Tourism sector

Table 5.5 presents the contribution of tourism to employment, GDP and business units in Dunedin City in 2012.

Table 5.5. Tourism sector's contribution to Dunedin City's economy, 2012

Role of tourism in local economy	Employment	%	GDP ($2012m)	%	Number of Business Units	%
Tourism-characteristic industries	2,577	*5.1%*	153.1	*3.2%*	412	*3.9%*
Tourism-related industries	601	*1.2%*	43.0	*0.9%*	93	*0.9%*
All non-tourism-related industries	345	*0.7%*	29.2	*0.6%*	75	*0.7%*
Dunedin City	**3,523**	***7.0%***	**225.2**	***4.6%***	**580**	***5.4%***
New Zealand	**102,453**	***5.5%***	**7,458.5**	***3.6%***	**20,739**	***4.1%***

Source: BERL Regional Database 2012

- The City's tourism sector had 580 establishments, which contributed $225.2 million to GDP and employed 3,523 people.
- The Tourism sector's contribution to the Dunedin City economy is slightly higher than nationally. Tourism accounts for 7.0 percent of employment and 4.6 percent of GDP in Dunedin City. These are all higher than the Tourism sector's contribution at a national level of 5.5 percent of employment and 3.6 percent of GDP.

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

Table 5.6. Tourism Employment, Dunedin City, 2002 - 2012

Tourism Employment (FTEs)	Years ending March				%pa change	
	2002	2010	2011	2012	2011 to 2012	2002 to 2012
Tourism-characteristic industries	1,461	1,954	2,134	2,577	20.8	5.8
Tourism-related industries	484	499	545	601	10.2	2.2
All non-tourism-related industries	209	295	300	345	15.0	5.1
Tourism Sector	**2,154**	**2,748**	**2,979**	**3,523**	**18.2**	**5.0**
Total Employment: Dunedin City	**45,075**	**51,268**	**50,722**	**50,393**	**-0.6**	**1.1**

Source: BERL Regional Database 2012

- In 2012, the Tourism sector added 544 FTEs over 2011. Over the past ten years, FTE growth related to tourism increased by 5 percent per annum.

Table 5.7 presents the recent and longer-term contribution of tourism GDP to the Dunedin City economy.

Table 5.7. Tourism GDP, Dunedin City, 2002 - 2012

Tourism GDP (2012$m)	Years ending March				%pa change	
	2002	2010	2011	2012	2011 to 2012	2002 to 2012
Tourism-characteristic industries	86	121	133	153	15.2	6.0
Tourism-related industries	22	34	36	43	17.9	7.0
All non-tourism-related industries	19	26	27	29	9.2	4.4
Tourism Sector	**127**	**181**	**196**	**225**	**14.9**	**5.9**
Total GDP: Dunedin City	**4,318**	**4,934**	**4,859**	**4,842**	**-0.4**	**1.2**

Source: BERL Regional Database 2012

- Tourism generated $225 million in GDP in 2012, a $29 million increase on 2011. Over the last decade, Tourism GDP growth has averaged 5.9 percent per annum.

Table 5.8 presents the recent and longer-term change in tourism business units in the Dunedin City economy.

Table 5.8. Tourism Business Units in Dunedin City, 2002 - 2012

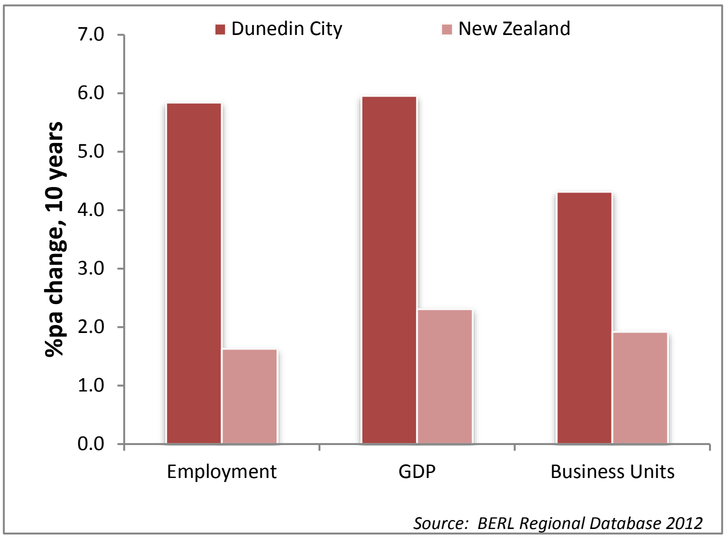
Tourism Business units	Years ending March				%pa change	
	2002	2010	2011	2012	2011 to 2012	2002 to 2012
Tourism-characteristic industries	270	361	366	412	12.5	4.3
Tourism-related industries	63	80	83	93	12.9	4.0
All non-tourism-related industries	43	61	62	75	20.6	5.8
Tourism Sector	**375**	**502**	**511**	**580**	**13.5**	**4.4**
Total Business Units: Dunedin City	**8,942**	**10,840**	**10,636**	**10,658**	**0.2**	**1.8**

Source: BERL Regional Database 2012

- In 2012, there was an increase of 69 business units related to the Tourism sector.
- Over the last ten years, the number of tourist businesses has increased from 375 in 2002 to 580 in 2012, an increase of 4.4 percent per annum.

Figure 5.2 shows the change in employment, GDP, and business units in the Tourism sector in Dunedin City and nationally between 2002 and 2012.

Figure 5.2. Tourism sector key indicator growth, Dunedin City vs. New Zealand, 2002 - 2012



- Over the last ten years, Dunedin City has enjoyed strong growth in tourism activity at rates well above national tourism activity.

5.4.2 Primary Production sector

In 2012, the Primary Production sector employed 1,344 FTEs in 967 business units and contributed $142 million to the Dunedin City economy. The major industries in this sector are the Agriculture industry, which accounts for around three quarters of employment; and the Services to Agriculture and Hunting and Trapping industries, which account for one sixth of the sector's employment.

Table 5.9 presents the recent and longer-term contribution of the Primary Production sector employment to the Dunedin City economy.

Table 5.9. Primary Production Employment, Dunedin City, 2002 - 2012

Primary production sector Employment (FTEs)	Year ending March				%pa change	
	2002	2010	2011	2012	*2011 to 2012*	*2002 to 2012*
Agriculture	1,035	786	937	1,003	*7.1*	*-0.3*
Aquaculture	6	0	0	0	*na*	*-100.0*
Services to Agriculture; Hunting and Trapping	196	182	176	215	*22.3*	*0.9*
Forestry and Logging	101	70	87	74	*-14.1*	*-3.0*
Mining and services to mining	10	155	56	51	*-9.1*	*18.1*
Primary production sector	**1,349**	**1,194**	**1,256**	**1,344**	***7.0***	***0.0***
Total employment: Dunedin City	**45,075**	**51,268**	**50,722**	**50,393**	***-0.6***	***1.1***

Source: BERL Regional Database 2012

- Employment in the Primary Production sector increased in 2012, with 88 more FTEs than in 2011.
- Over the last decade, employment in the Primary Production sector remained almost unchanged, which contrasts with growth in total employment for Dunedin City overall.

Table 5.10 presents the recent and longer-term contribution of the Primary Production sector GDP to the Dunedin City economy.

Table 5.10. Primary Production GDP, Dunedin City, 2002 - 2012

Primary production sector GDP (2012$m)	Year ending March				%pa change	
	2002	2010	2011	2012	*2011 to 2012*	*2002 to 2012*
Agriculture	61.3	51.1	53.4	75.3	*40.9*	*2.1*
Aquaculture	3.6	0.0	0.0	0.0	*na*	*-100.0*
Services to Agriculture; Hunting and Trapping	23.5	20.5	19.8	26.4	*33.3*	*1.2*
Forestry and Logging	33.4	34.1	42.4	37.2	*-12.4*	*1.1*
Mining and services to mining	2.0	14.1	4.9	3.5	*-28.8*	*5.5*
Primary production sector	**123.9**	**119.8**	**120.6**	**142.4**	**18.1**	***1.4***
Total GDP: Dunedin City	**4,318**	**4,934**	**4,859**	**4,842**	**-0.4**	***1.2***

Source: BERL Regional Database 2012

- In 2012, the Primary Production sector contributed $142.4 million to the Dunedin City economy. This was 18.1 percent higher than in 2011 and well above the contracted total GDP growth of 0.4 percent in Dunedin City.
- Over the last decade, GDP growth in the Primary Production sector was 1.4 percent per annum, slightly higher than the total GDP growth in Dunedin City of 1.2 percent per annum.

Table 5.11 presents the recent and longer-term change in Primary Production sector business units in the Dunedin City economy.

Table 5.11. Primary Production Business Units, Dunedin City, 2002 - 2012

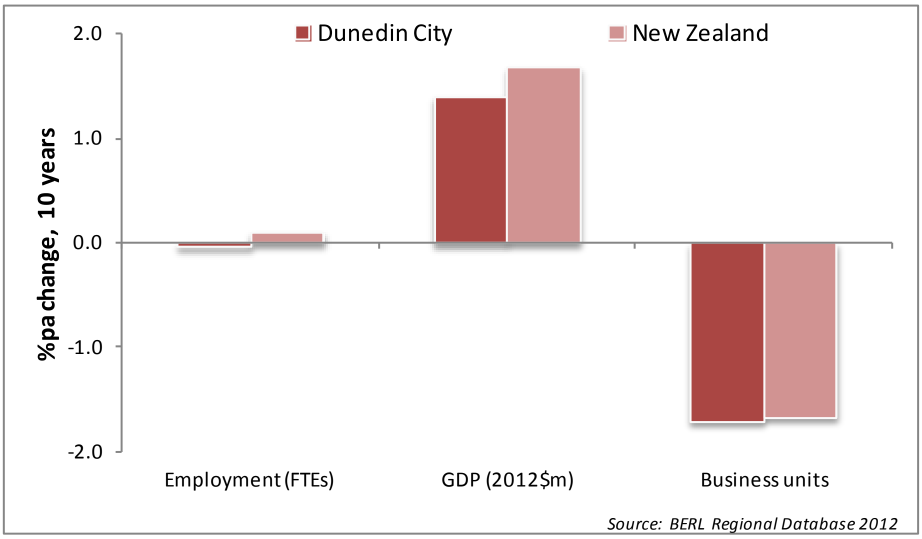
Primary production sector Business units	Year ending March				%pa change	
	2002	2010	2011	2012	*2011 to 2012*	*2002 to 2012*
Agriculture	846	713	680	695	*2.2*	*-1.9*
Aquaculture	4	2	2	2	*0.0*	*-6.7*
Services to Agriculture; Hunting and Trapping	159	141	131	140	*6.9*	*-1.3*
Forestry and Logging	132	127	127	116	*-8.7*	*-1.3*
Mining and services to mining	8	12	12	14	*16.7*	*5.8*
Primary production sector	**1,149**	**995**	**952**	**967**	***1.6***	***-1.7***
Total business units: Dunedin City	**8,942**	**10,840**	**10,636**	**10,658**	***0.2***	***1.8***

Source: BERL Regional Database 2012

- In 2012, Business Units in Primary Production increased by 1.6 percent, or 15 businesses. The greatest contributor to the increase was in the Agriculture industry, which gained 15 business units.
- The Forestry and Logging industry lost 8.7 percent of its Business Units, a loss of 11 business units.

Figure 5.3 shows the change in employment, GDP and business units in the Primary Production sector in Dunedin City and nationally between 2002 and 2012.

Figure 5.3. Primary Production sector growth, Dunedin City vs. New Zealand, 2002 - 2012



- Although GDP growth was positive, Dunedin City's Primary Production sector has not performed as well as the sector nationally over the last ten years. Average annual performance in all three indicators were below national activity.

5.4.3 Primary Processing sector

In 2012, the Primary Processing sector employed 1,361 FTEs in 123 businesses, generating $196 million in GDP.

The Primary Processing sector is made up of two industries – the Food, Beverage and Tobacco, and Wood and Paper Product Manufacturing industries. The Food, Beverage and Tobacco industry is the dominant industry within the sector in Dunedin City's Primary Processing sector, accounting for around 75 percent of employment.

Table 5.12 presents the recent and longer-term contribution of Primary Processing employment to the Dunedin City economy.

Table 5.12. Primary Processing Employment, Dunedin City, 2002 - 2012

Primary processing sector Employment (FTEs)	Year ending March				%pa change	
	2002	2010	2011	2012	*2011 to 2012*	*2002 to 2012*
Food, Beverage and Tobacco	3,124	2,372	1,241	1,018	*-18.0*	*-10.6*
Wood and Paper Product Manufacturing	445	342	326	343	*5.2*	*-2.6*
Primary processing sector	**3,569**	**2,714**	**1,567**	**1,361**	***-13.2***	***-9.2***
Total employment: Dunedin City	**45,075**	**51,268**	**50,722**	**50,393**	***-0.6***	***1.1***

Source: BERL Regional Database 2012

- In 2012, employment in Dunedin City's Primary Processing sector declined by 13.2 percent.
- Over the decade, employment in the Primary Processing sector has declined by an average of 9.2 percent per annum.

Table 5.13 presents the recent and longer-term contribution of Primary Processing GDP to the Dunedin City economy.

Table 5.13. Primary Processing GDP, Dunedin City, 2002 - 2012

Primary processing sector GDP (2012$m)	Year ending March				%pa change	
	2002	2010	2011	2012	*2011 to 2012*	*2002 to 2012*
Food, Beverage and Tobacco	332.0	314.3	163.3	136.0	*-16.7*	*-8.5*
Wood and Paper Product Manufacturing	56.4	57.7	55.2	60.2	*9.2*	*0.7*
Primary processing sector	**388.3**	**372.0**	**218.5**	**196.2**	***-10.2***	***-6.6***
Total GDP: Dunedin City	**4,318.1**	**4,933.5**	**4,859.5**	**4,841.8**	***-0.4***	***1.2***

Source: BERL Regional Database 2012

- In 2012, GDP in the Primary Processing sector declined by 10.2 percent.
- Over the decade, GDP in the Primary Processing sector has declined by 6.6 percent per annum.

Table 5.14 presents the recent and longer-term change in Primary Processing business units in the Dunedin City economy.

Table 5.14. Primary Processing Business Units, Dunedin City, 2002 - 2012

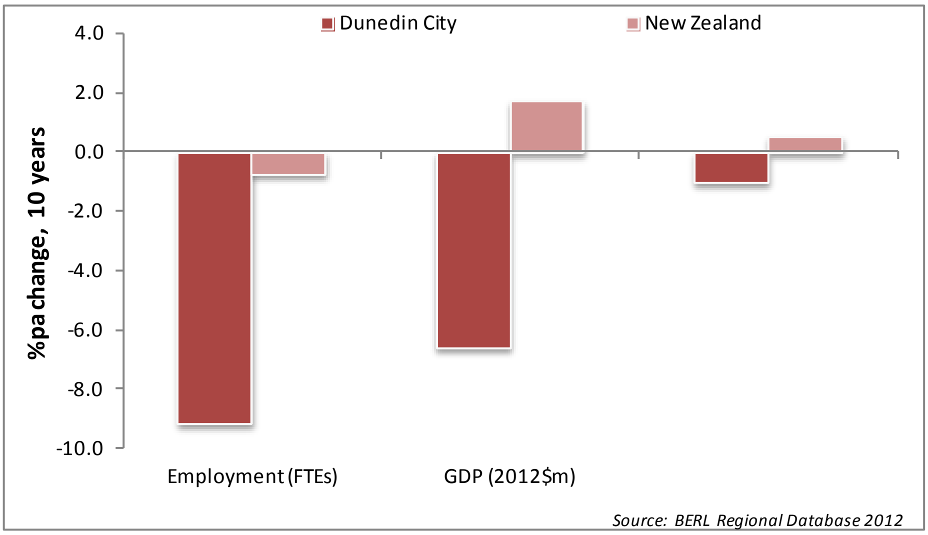
Primary processing sector Business units	Year ending March				%pa change	
	2002	2010	2011	2012	*2011 to 2012*	*2002 to 2012*
Food, Beverage and Tobacco	82	74	73	74	*1.4*	*-1.0*
Wood and Paper Product Manufacturing	54	49	47	49	*4.3*	*-1.0*
Primary processing sector	**136**	**123**	**120**	**123**	***2.5***	***-1.0***
Total business units: Dunedin City	**8,942**	**10,840**	**10,636**	**10,658**	***0.2***	***1.8***

Source: BERL Regional Database 2012

- There were 123 business units in the Primary Processing sector in 2012, only three more than in 2011. Business units in the Primary Sector have been declining by 1.0 percent per annum over the last decade.
- Business units in the Food, Beverage and Tobacco industry and the Wood and Paper Product Manufacturing industry both contracted over the past decade at a similar rate.

Figure 5.4 shows the change in employment, GDP and business units in the Primary Processing sector in Dunedin City and nationally between 2002 and 2012.

Figure 5.4. Primary Processing sector growth, Dunedin City vs. New Zealand, 2002 - 2012



- In the ten years to 2012, activity across all indicators has declined. This is in contrast to national activity (except in employment).

5.4.4 Creative sector

In 2012, Dunedin City's Creative sector had 1,350 FTEs employed in 363 establishments generating $47.5 million in GDP. The largest industry within Dunedin City's Creative sector was the Printing and Publishing industry, accounting for 57 percent of the sector's employment. Due to the modest productivity of this industry, this employment translates into only 23 percent of the sector's GDP.

Table 5.15 presents the recent and longer-term contribution of employment in the Creative sector to the Dunedin City economy.

Table 5.15. Creative sector Employment, Dunedin City, 2002 - 2012

Creative sector Employment (FTEs)	Year ending March				%pa change	
	2002	2010	2011	2012	2011 to 2012	2002 to 2012
Printing and publishing	1,099	830	840	776	-7.6	-3.4
Arts and antiques market	75	66	60	59	-2.2	-2.4
Commercial services	171	178	193	219	13.3	2.5
Film, video and television services	268	219	212	219	3.2	-2.0
Music, creative and performing arts and venues	133	98	77	77	-0.2	-5.3
Creative sector	**1,746**	**1,391**	**1,383**	**1,350**	***-2.4***	***-2.5***
Total employment: Dunedin City	**45,075**	**51,268**	**50,722**	**50,393**	***-0.6***	***1.1***

Source: BERL Regional Database 2012

- Employment in the Creative sector fell by 33 FTEs in 2012, largely a result of 64 fewer FTEs in the Printing and Publishing industry and one less FTE in the Arts and Antiques Market. On the positive side, the Commercial Services industry gained 26 FTEs.
- Over the decade, employment in the Creative sector has contracted by 2.5 percent per annum. Only the Commercial Services industry had experienced an increase in employment over the last ten years.

Table 5.16 presents the recent and longer-term contribution of Creative sector GDP to the Dunedin City economy.

Table 5.16. Creative sector GDP, Dunedin City, 2002 - 2012

Creative sector GDP (2012$ m)	Year ending March				%pa change	
	2002	2010	2011	2012	2011 to 2012	2002 to 2012
Printing and publishing	15.9	9.8	9.7	10.7	11.2	-3.9
Arts and antiques market	3.4	4.4	4.0	4.2	4.6	2.1
Commercial services	10.4	8.0	9.3	11.8	26.6	1.2
Film, video and television services	20.8	14.9	15.3	15.4	0.9	-3.0
Music, creative and performing arts and venues	10.1	6.9	5.6	5.5	-2.9	-6.0
Creative sector	**60.8**	**44.1**	**43.9**	**47.6**	***8.5***	***-2.4***
Total GDP: Dunedin City	**4,318.1**	**4,933.5**	**4,859.5**	**4,841.8**	***-0.4***	***1.2***

Source: BERL Regional Database 2012

- In 2012, the GDP contribution from the Creative sector increased by 8.5 percent.
- Over the decade, the GDP contribution from the Creative sector has fallen by an average of 2.4 percent each year.

Table 5.17 presents the recent and longer-term change in Creative sector business units in the Dunedin City economy.

Table 5.17. Creative sector Business Units, Dunedin City, 2002 - 2012

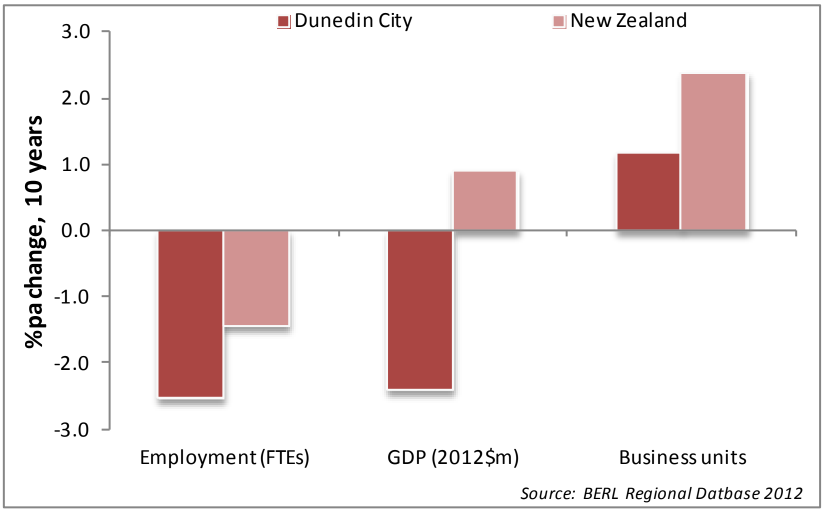
Creative sector Business units	Year ending March				%pa change	
	2002	2010	2011	2012	*2011 to 2012*	*2002 to 2012*
Printing and publishing	42	46	43	43	*0.0*	*0.2*
Arts and antiques market	49	44	39	42	*7.7*	*-1.5*
Commercial services	103	132	133	137	*3.0*	*2.9*
Film, video and television services	43	46	50	51	*2.0*	*1.7*
Music, creative and performing arts and venues	86	101	94	90	*-4.3*	*0.5*
Creative sector	**323**	**369**	**359**	**363**	***1.1***	***1.2***
Total business units: Dunedin City	**8,942**	**10,840**	**10,636**	**10,658**	***0.2***	***1.8***

Source: BERL Regional Database 2012

- In 2012, the number of business units in the Creative sector increased by four establishments, brought about by new business units in the Arts and Antique Markets; Commercial Services; and Film, Video and Television Services industries.

Figure 5.5 shows the change in employment, GDP and business units in the Creative sector in Dunedin City and nationally between 2002 and 2012.

Figure 5.5. Creative sector growth, Dunedin City vs. New Zealand, 2002 - 2012



The Creative sector in Dunedin City has underperformed across the three activity measures relative to the Creative sector nationally. In particular, GDP has averaged -2.4 percent per annum, compared to 0.9 percent per annum growth nationally.

5.4.5 Education & Research sector

The Education & Research sector is one of Dunedin City's most significant employers and contributors to GDP, accounting for almost 14 percent of total employment and generating $350.3 million in GDP, coming from 333 business units in 2012. Including the Otago University, the Higher Education sector employs 4,139 FTEs, accounting for 61 percent of employment in the sector.

Table 5.18 presents the recent and longer-term contribution of Education & Research employment to the Dunedin City economy.

Table 5.18. Education & Research Employment, Dunedin City, 2002 - 2012

Education & research sector Employment (FTEs)	Year ending March				%pa change	
	2002	2010	2011	2012	2011 to 2012	2002 to 2012
Preschool Education	264	420	438	476	*8.8*	*6.1*
Primary and Secondary Education	1,833	1,750	1,835	1,663	*-9.3*	*-1.0*
Higher Education	1,490	4,559	4,367	4,139	*-5.2*	*10.8*
Other Education	91	196	197	202	*2.3*	*8.3*
Scientific Research	227	325	363	337	*-7.3*	*4.0*
Education & research sector	**3,905**	**7,250**	**7,201**	**6,817**	***-5.3***	***5.7***
Total employment: Dunedin City	**45,075**	**51,268**	**50,722**	**50,393**	***-0.6***	***1.1***

Source: BERL Regional Database 2012

- Employment in the Education & Research sector fell by 384 FTEs in 2012. This reflected a loss of 228 FTEs in the Higher Education and 172 FTEs in the Primary and Secondary Education industry, despite the gains in Preschool Education and Other Education.
- Over the decade, employment in the Education & Research sector has grown by 5.7 percent per annum, led by Higher Education; Other Education; and Preschool Education, which have grown their employment by more than five percent per annum.

Table 5.19 presents the recent and longer-term contribution of Education & Research GDP to the Dunedin City economy.

Table 5.19. Education & Research GDP, Dunedin City[34], 2002 - 2012

Education & research sector GDP (2012$m)	Year ending March				%pa change	
	2002	2010	2011	2012	2011 to 2012	2002 to 2012
Preschool Education	17.6	20.7	21.4	23.5	*10.0*	*2.9*
Primary and Secondary Education	122.3	86.0	89.5	82.1	*-8.3*	*-3.9*
Higher Education	99.4	224.2	213.2	204.3	*-4.2*	*7.5*
Other Education	6.1	9.6	9.6	10.0	*3.5*	*5.1*
Scientific Research	23.3	29.9	33.2	31.3	*-5.9*	*3.0*
Education & research sector	**268.6**	**370.4**	**367.0**	**351.1**	***-4.3***	***2.7***
Total GDP: Dunedin City	**4,318.1**	**4,933.5**	**4,859.5**	**4,841.8**	***-0.4***	***1.2***

Source: BERL Regional Database 2012

[34] Note the total for the Education & Research sector does not match the 86-industry level education industry total as shown in the Appendices because the compositions are different. This is because the Education & Research sector includes scientific research, while the education industry does not.

- In 2012, GDP in the Education & Research sector fell by $15.9 million, with a $8.9 million drop in the Higher Education industry; $7.4 million in the Primary and Secondary Education industry; and $1.9 million in the Scientific Research industry.
- Over the decade, GDP in the Education & Research sector has grown by 2.7 percent per annum, a faster rate than the sector nationally.

Table 5.20 presents the recent and longer-term change in Education & Research business units in the Dunedin City economy.

Table 5.20. Education & Research Business Units, Dunedin City, 2002 - 2012

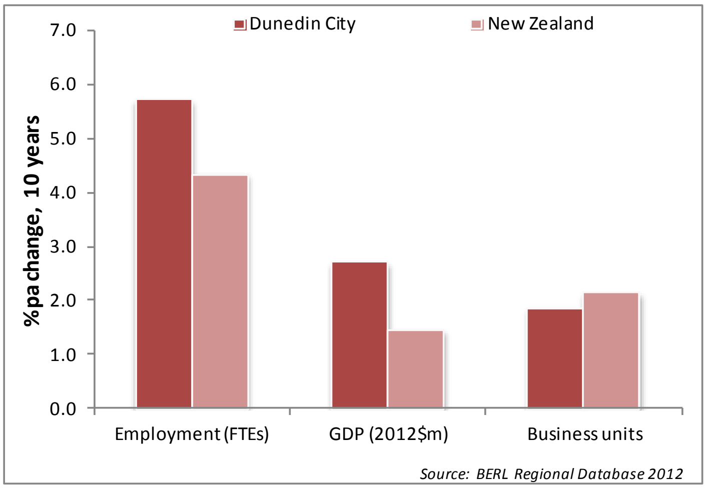
Education & research sector Business units	Year ending March				%pa change	
	2002	2010	2011	2012	*2011 to 2012*	*2002 to 2012*
Preschool Education	68	75	77	76	*-1.3*	*1.1*
Primary and Secondary Education	94	85	81	78	*-3.7*	*-1.8*
Higher Education	21	24	26	29	*11.5*	*3.3*
Other Education	58	85	83	80	*-3.6*	*3.3*
Scientific Research	36	64	69	70	*1.4*	*6.9*
Education & research sector	**277**	**333**	**336**	**333**	***-0.9***	***1.9***
Total business units: Dunedin City	**8,942**	**10,840**	**10,636**	**10,658**	***0.2***	***1.8***

Source: BERL Regional Database 2012

- The Education & Research sector contracted by three Business Units in 2012.
- In 2012, and in spite of the growth in business units coming from the Higher Education and the Scientific Research industries, the contraction in other industries pulled down the net growth of the sector's business units.
- Over the last decade, the number of business units has increased by 1.9 percent per annum, an increase of 56 business units.

Figure 5.6 shows the change in employment, GDP and business units in the Education & Research sector in Dunedin City and nationally between 2002 and 2012.

Figure 5.6. Education & Research sector growth, Dunedin City vs. New Zealand, 2002 - 2012



- Employment and GDP in Dunedin City's Education & Research sector grew faster than the national average, over the decade, but business units grew more slowly than average.

5.4.6 Engineering, Machinery & Equipment Manufacturing

The Engineering, Machinery & Equipment Manufacturing sector employs 871 FTEs across 170 business units, and contributes $83.6 million to the Dunedin City economy.

Table 5.21 presents the recent and longer-term contribution of Engineering, Machinery & Equipment Manufacturing employment to the Dunedin City economy.

Table 5.21. Engineering, Machinery & Equipment Manufacturing Employment, Dunedin City, 2002 - 2012

Engineering, machinery & equipment manufacturing sector Employment (FTEs)	Year ending March				%pa change	
	2002	2010	2011	2012	2011 to 2012	2002 to 2012
Machinery and Equipment Manufacturing	503	434	448	442	*-1.3*	*-1.3*
Consultant Engineering Services	278	365	367	429	*16.7*	*4.4*
Engineering, machinery & equipment manufacturing sector	**781**	**800**	**816**	**871**	***6.8***	***1.1***
Total Employment: Dunedin City	**45,075**	**51,268**	**50,722**	**50,393**	***-0.6***	***1.1***

Source: BERL Regional Database 2012

- In 2012, the Engineering, Machinery & Equipment Manufacturing sector added a further 55 FTEs. This employment growth mainly came from the Consultant Engineering Services industry.
- Over the last decade, the Engineering, Machinery & Equipment Manufacturing sector added 90 FTEs, growing at 1.1 percent per annum, the same growth rate of employment in Dunedin City. Over the past decade, the main contributor to employment growth was from the Consultant Engineering Services industry.

Table 5.22 presents the recent and longer-term contribution of Engineering, Machinery & Equipment Manufacturing GDP to the Dunedin City economy.

Table 5.22. Engineering, Machinery & Equipment Manufacturing GDP, Dunedin City, 2002 - 2012

Engineering, machinery & equipment manufacturing sector GDP (2012$m)	Year ending March				%pa change	
	2002	2010	2011	2012	2011 to 2012	2002 to 2012
Machinery and Equipment Manufacturing	41.9	37.4	42.6	44.0	*3.1*	*0.5*
Consultant Engineering Services	28.5	33.6	33.6	39.8	*18.4*	*3.4*
Engineering, machinery & equipment manufacturing sector	**70.4**	**71.1**	**76.2**	**83.8**	***9.9***	***1.8***
Total GDP: Dunedin City	**4,318.1**	**4,933.5**	**4,859.5**	**4,841.8**	***-0.4***	***1.2***

Source: BERL Regional Database 2012

- GDP in the Engineering, Machinery & Equipment Manufacturing sector increased by 9.9 percent in 2012. This GDP increase was mainly from the Consultant Engineering Services industry (up 18.4 percent) but the Machinery and Equipment Manufacturing industry also contributed to this increase (up 3.1 percent).
- Over the last decade, GDP in the Machinery & Equipment Manufacturing sector grew at a slightly higher rate than total GDP in Dunedin City. Both industries under the sector contributed to the GDP growth.

Table 5.23 presents the recent and longer-term change in Engineering, Machinery & Equipment Manufacturing business units in the Dunedin City economy.

Table 5.23. Engineering, Machinery & Equipment Manufacturing Business Units, Dunedin City, 2002 - 2012

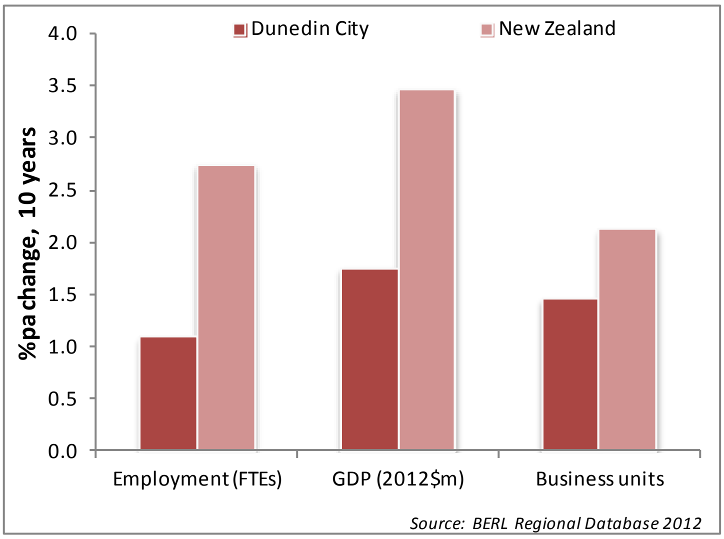
Engineering, machinery & equipment manufacturing sector Business units	Year ending March				%pa change	
	2002	2010	2011	2012	2011 to 2012	2002 to 2012
Machinery and Equipment Manufacturing	72	69	66	68	*3.0*	*-0.6*
Consultant Engineering Services	75	97	100	102	*2.0*	*3.1*
Engineering, machinery & equipment manufacturing sector	**147**	**166**	**166**	**170**	***2.4***	***1.5***
Total Business units: Dunedin City	**8,942**	**10,840**	**10,636**	**10,658**	***0.2***	***1.8***

Source: BERL Regional Database 2012

- Business units in the Engineering, Machinery & Equipment Manufacturing sector grew by 2.4 percent in 2012. The number of business units increased by four and were evenly distributed between the Machinery and Equipment Manufacturing and in the Consultant Engineering Services industries.
- Over the decade, Engineering, Machinery & Equipment Manufacturing business units have increased by 1.5 percent per annum, with all the growth coming from the Consultant Engineering Services industry.

Figure 5.7 shows the change in employment, GDP and business units in the Engineering, Machinery & Equipment Manufacturing sector in Dunedin City and nationally between 2002 and 2012.

Figure 5.7. Engineering, Machinery & Equipment Manufacturing sector growth, Dunedin City vs. New Zealand, 2002 - 2012



- Growth in the Engineering, Machinery & Equipment Manufacturing sector in Dunedin City has been positive across the three indicators. However, growth in all three indicators was at a slower rate than nationally.

5.4.7 ICT sector

The ICT sector in Dunedin City employed 568 FTEs in 191 Business Units and generated almost $128.8 million in GDP. The Wholesaling and Commercial Services industries are the major employment industries in the ICT sector in Dunedin City, accounting for around 80 percent of employment. However, the Telecommunication Services industry accounts for 52 percent of GDP in the ICT sector.

Table 5.24 presents the recent and longer-term contribution of ICT employment to the Dunedin City economy.

Table 5.24. ICT Employment, Dunedin City, 2002 - 2012

ICT sector Employment (FTEs)	Year ending March				%pa change	
	2002	2010	2011	2012	*2011 to 2012*	*2002 to 2012*
Manufacturing	42	53	41	47	*13.0*	*1.1*
Wholesaling	267	227	229	260	*13.6*	*-0.3*
Telecommunication services	47	67	73	67	*-7.9*	*3.7*
Commercial services	158	213	224	194	*-13.7*	*2.1*
ICT sector	**514**	**561**	**568**	**568**	***0.0***	***1.0***
Total employment: Dunedin City	**45,075**	**51,268**	**50,722**	**50,393**	***-0.6***	***1.1***

Source: BERL Regional Database 2012

- There was no employment growth in the ICT sector in 2012, which remained at 568 FTEs. Although there was employment growth in the Manufacturing and Wholesaling industries, there were corresponding contractions in the Telecommunication Services; and Commercial Services industries.
- Over the last decade, the ICT sector has averaged 1.0 percent employment growth, compared to 1.1 percent employment growth in Dunedin City.

Table 5.25 presents the recent and longer-term contribution of ICT GDP to the Dunedin City economy between 2002 and 2012.

Table 5.25. ICT GDP, Dunedin City, 2002 - 2012

ICT sector GDP (2012$m)	Year ending March				%pa change	
	2002.0	2010	2011	2012	*2011 to 2012*	*2002 to 2012*
Manufacturing	3.5	4.7	4.1	4.8	*18.4*	*3.3*
Wholesaling	31.3	25.4	26.7	30.7	*15.0*	*-0.2*
Telecommunication services	39.0	73.2	79.7	67.4	*-15.4*	*5.6*
Commercial services	44.5	48.0	41.3	26.2	*-36.7*	*-5.2*
ICT sector	**118.3**	**151.3**	**151.8**	**129.1**	***-14.9***	***0.9***
Total GDP: Dunedin City	**4318.1**	**4,933.5**	**4,859.5**	**4,841.8**	***-0.4***	***1.2***

Source: BERL Regional Database 2012

- Despite no movement in the employment growth, Dunedin City's ICT sector GDP contribution fell by $22.7 million. This was largely a result of GDP falls in the Telecommunication Services and Commercial Services industries.

Table 5.26 presents the recent and longer-term change in ICT business units to the Dunedin City economy.

Table 5.26. ICT Business Units, Dunedin City, 2002 - 2012

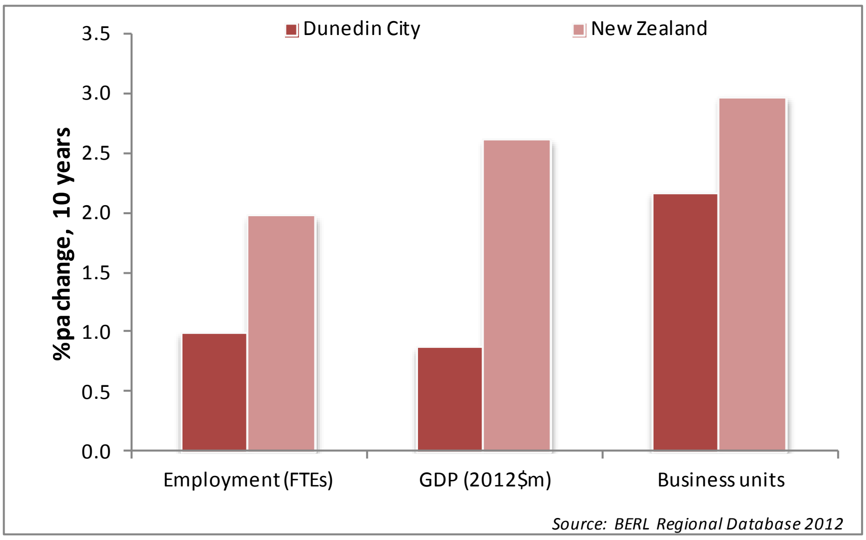
ICT sector Business units	Year ending March				%pa change	
	2002	2010	2011	2012	*2011 to 2012*	*2002 to 2012*
Manufacturing	7	5	6	7	*16.7*	*0.0*
Wholesaling	66	53	53	51	*-3.8*	*-2.5*
Telecommunication services	7	9	8	7	*-12.5*	*0.0*
Commercial services	74	123	126	126	*0.0*	*5.5*
ICT sector	**154**	**190**	**193**	**191**	***-1.0***	***2.2***
Total business units: Dunedin City	**8,942**	**10,840**	**10,636**	**10,658**	***0.2***	***1.8***

Source: BERL Regional Database 2012

- The number of business units in the ICT sector decreased slightly, by two business units. Over the last decade, the ICT sector has added 37 business units at an average growth rate of 2.2 percent.

Figure 5.8 shows the change in employment, GDP and business units in the ICT sector in Dunedin City and nationally between 2002 and 2012.

Figure 5.8. ICT sector growth, Dunedin City vs. New Zealand, 2002 - 2012



- Dunedin's ICT sector has sustained modest gains in GDP, employment, and business units, similar to the national performance over the past decade.

6 Queenstown-Lakes District

6.1 Economy – Queenstown-Lakes District

Table 6.1. presents sector-level GDP, employment, and business unit numbers in the Queenstown-Lakes District.

Table 6.1. GDP, employment, and business units, Queenstown-Lakes District, 2012

Sectors (2012)	FTEs	%	GDP (2012$m)	%	Business units	%
Primary	468	*3.1%*	38	*3.5%*	333	*5.3%*
Manufacturing	524	*3.5%*	64	*5.9%*	163	*2.6%*
Construction	1,886	*12.4%*	112	*10.4%*	1,016	*16.1%*
Wholesale and Distribution	899	*5.9%*	122	*11.2%*	309	*4.9%*
Retail Trade and Services	6,071	*40.1%*	275	*25.4%*	1,089	*17.2%*
Business Services	2,824	*18.6%*	304	*28.1%*	2,924	*46.3%*
Arts and Recreation Services	1,013	*6.7%*	69	*6.4%*	223	*3.5%*
Social Services	1,471	*9.7%*	97	*9.0%*	259	*4.1%*
Sub-total (excluding O.O.D.)	15,157	100.0%	1,082	100.0%	6,316	100.0%
*Owner-Occupied Dwellings**			175			
Total	**15,157**		**1,257**		**6,316**	

* Imputed value, included in Total GDP only

Source: BERL Regional Database, 2012

Figure 6.1. Business services sector GDP, Otago Region, 2012

The district employs 15,157 FTEs in 6,316 businesses and generates $1.26 billion in GDP. Retail Trade and Business Services are the two key sectors of the local economy, driven by tourism and real estate respectively. Construction is also relatively important in the district, accounting for 12 percent of employment.

The main driver of growth in the Queenstown-Lakes District was the Business Services sector. Figure 6.1 shows that GDP growth in the Business Services sector in the Queenstown-Lakes District was above the regional average.

6.2 Economic performance – Queenstown-Lakes District

Table 6.2 presents the key performance indicators for the Queenstown-Lakes District in 2012.

Table 6.2. Key performance indicators, 2012: Queenstown-Lakes District

Key Performance Indicators	%pa for 2012 year Queenstown-Lakes	Otago Region	New Zealand
Resident population growth	**1.7**	0.6	0.6
GDP growth	**5.4**	2.8	1.9
GDP per capita growth	**3.6**	2.2	1.3
Employment growth	**4.4**	0.7	1.0
Labour productivity growth	**1.4**	2.4	1.0
Business units growth	**2.0**	0.6	-0.2
Business size growth	**2.3**	0.1	1.2

Source: BERL Regional Database, 2012

In the year to March 2012, GDP growth increased by 5.4 percent. Tourism related sectors such as Retail Trade and Services, and Arts and Recreation Services had slightly positive GDP and employment growth. In most sectors, short-term growth has been modest.

The major drivers of GDP movements in the District are in the Retail Trade and Services; Wholesale and Distribution; and Business Services sectors.

Compared to 2011, GDP from the Retail Trade and Services sector is up 6.5 percent. The District's GDP from the Business Services sector increased by 8.1 percent (up $23 million from $282 million in 2011). GDP gains from other key sectors of the district were sufficient to compensate for the contraction of earnings in the Construction sector (down 9.5 percent).

The total number of FTEs was up 4.4 percent from 14,521 FTEs in 2011. The additional 636 FTEs were jobs created in the Retail Trade and Services, and Business Services sectors. Employment in the Construction sector decreased to 1,886 FTEs in 2012 (down 2.0 percent from 2011).

The significant increase in employment in the Accommodation industry (88 FTEs) is contributed by the increase in Business Units in the Travel Agency and Tour Arrangement Services industry (10 business units).

Table 6.3 summarises the 10-year performance indicators of Queenstown-Lakes District.

Table 6.3. 10-year Key performance indicators, Queenstown-Lakes District, 2002 to 2012

Key Performance Indicators	%pa for 2002 - 2012 Queenstown-Lakes	Otago Region	New Zealand
Resident population growth	**4.3**	1.0	1.2
GDP growth	**5.0**	2.2	2.3
GDP per capita growth	**0.7**	1.2	1.1
Employment growth	**4.1**	1.8	1.8
Labour productivity growth	**0.8**	0.4	0.5
Business units growth	**6.3**	2.7	2.1
Business size growth	**-2.1**	-0.8	-0.3

Source: BERL Regional Database, 2012

Since 2002, the Queenstown-Lakes District has enjoyed remarkable growth in population, GDP, employment and business units. It has outperformed the region and New Zealand on all indicators apart from GDP per capita growth and business size growth. However, the low GDP growth per capital growth is largely the result of the rapid increase in resident population growth.

6.3 Fastest growing industries – Queenstown-Lakes District

Table 6.4 presents the top 10 fastest growing industries by employment in Queenstown-Lakes District in the ten years to 2012.[35]

Table 6.4. Ten fastest growing industries by FTE growth, Queenstown-Lakes District, 2002 to 2012

Rank by FTE growth	Industry	Employment (FTEs) 2002	2012	%pa growth
1	Machinery and Equipment Wholesaling	19	103	18.7
2	Public Administration	55	227	15.3
3	Medical and Other Health Care Services	53	208	14.7
4	Food Product Manufacturing	57	189	12.7
5	Building Cleaning Pest Control and Other Support Services	52	158	11.8
6	Heavy and Civil Engineering Construction	68	185	10.6
7	Rental and Hiring Services (except Real Estate)	107	274	9.9
8	Public Order Safety and Regulatory Services	93	204	8.2
9	Professional Scientific and Technical Services (exc Comp Sys Dsn & related)	327	711	8.1
10	Preschool and School Education	229	496	8.1

Source: BERL Regional Database, 2012

The fastest growing industry is the Machinery and Equipment Wholesaling industry. It is likely that this industry's growth is from the rapid population growth and the associated infrastructure developments required in the District.

[35] Only includes industries with employment greater than 100 FTEs.

6.4 Key sectors – Queenstown-Lakes District

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

6.4.1 Tourism sector

Table 6.5 presents the contribution of the Tourism sector to employment, GDP and business units in the Queenstown-Lakes District in 2012.

Table 6.5. Tourism sector's contribution to Queenstown-Lakes District economy, 2012

Role of tourism in local economy	Employment	%	GDP ($2012m)	%	Number of Business Units	%
Tourism-characteristic industries	4,569	***30.1%***	221.2	***17.6%***	687	***10.9%***
Tourism-related industries	452	***3.0%***	32.3	***2.6%***	103	***1.6%***
All non-tourism-related industries	151	***1.0%***	12.4	***1.0%***	93	***1.5%***
Queenstown-Lakes	**5,171**	***34.1%***	**265.9**	***21.1%***	**883**	***14.0%***
New Zealand	**102,453**	***5.5%***	**7,458.5**	***3.6%***	**20,739**	***4.1%***

Source: BERL Regional Database 2012

The Tourism sector is extremely significant in the Queenstown-Lakes District, accounting for 34.1 percent of employment and 21.1 percent of GDP in 2012. Much of the District's economic activity is from Tourism-characteristic industries.

Table 6.6 presents the recent and longer-term contribution of tourism employment to the Queenstown-Lakes District economy.

Table 6.6. Tourism Employment, Queenstown-Lakes District, 2002 - 2012

Tourism Employment (FTEs)	Years ending March				%pa change	
	2002	2010	2011	2012	2011 to 2012	2002 to 2012
Tourism-characteristic industries	3,226	3,972	4,204	4,569	8.7	3.5
Tourism-related industries	368	442	440	452	2.7	2.1
All non-tourism-related industries	83	136	136	151	11.0	6.1
Tourism Sector	**3,677**	**4,549**	**4,780**	**5,171**	**8.2**	**3.5**
Total Employment: Queenstown-Lak	**10,160**	**14,457**	**14,521**	**15,157**	**4.4**	**4.1**

Source: BERL Regional Database 2012

- Employment in the Tourism sector increased by 391 FTEs, or 8.2 percent in 2012.
- In the last ten years, employment growth in the Tourism sector was 3.5 percent per annum, adding 1,494 FTEs in total.

Table 6.7 presents the recent and longer-term contribution of Tourism GDP to the Queenstown-Lakes District economy.

Table 6.7. Tourism GDP, Queenstown-Lakes District, 2002 - 2012

Tourism GDP (2012$m)	Years ending March				%pa change	
	2002	2010	2011	2012	2011 to 2012	2002 to 2012
Tourism-characteristic industries	137	193	207	221	6.9	4.9
Tourism-related industries	17	30	29	32	9.9	6.9
All non-tourism-related industries	7	12	12	12	4.7	5.9
Tourism Sector	**161**	**235**	**248**	**266**	**7.2**	**5.1**
Total GDP: Queenstown-Lakes	**771**	**1,189**	**1,193**	**1,257**	**5.4**	**5.0**

Source: BERL Regional Database 2012

- In 2012, Tourism GDP increased by $18 million over 2011, a 7.2 percent increase. This growth was at a faster rate than the GDP growth in the District, where there was a 5.4 percent increase.
- Over the last ten years, the increase in GDP of 5.1 percent per annum has been slightly faster than GDP growth in the District of 5.0 percent per annum.

Table 6.8 presents the recent and longer-term change in Tourism business units to the Queenstown-Lakes District economy.

Table 6.8. Tourism Business Units in Queenstown-Lakes District, 2002 - 2012

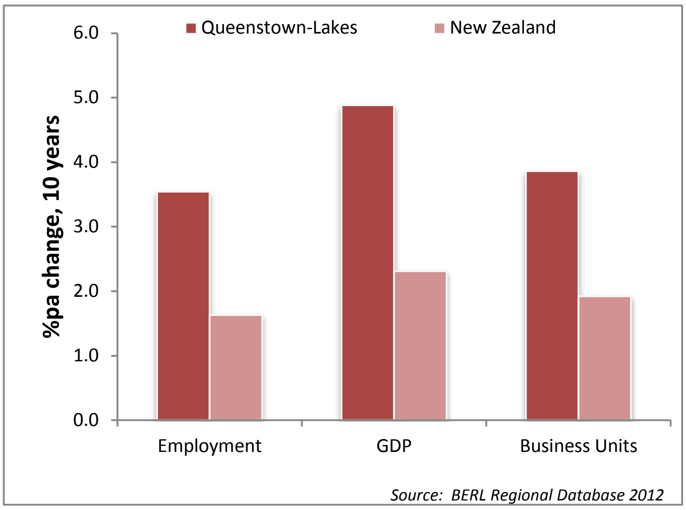
Tourism Business units	Years ending March				%pa change	
	2002	2010	2011	2012	2011 to 2012	2002 to 2012
Tourism-characteristic industries	470	632	636	687	7.9	3.9
Tourism-related industries	59	95	101	103	2.4	5.7
All non-tourism-related industries	43	84	87	93	7.6	8.1
Tourism Sector	**572**	**812**	**824**	**883**	**7.2**	**4.4**
Total Business Units: Queenstown-L	**3,422**	**6,142**	**6,190**	**6,316**	**2.0**	**6.3**

Source: BERL Regional Database 2012

- In 2012, Tourism business units increased by 59, or 7.2 percent
- From 2002 to 2012, Tourism business units have increased by 4.4 percent per annum.

Figure 6.2 shows the change in employment, GDP and business units in the Tourism sector in the Queenstown-Lakes District and nationally between 2002 and 2012.

Figure 6.2. Tourism sector growth, Queenstown-Lakes District vs. New Zealand, 2002 - 2012



As one of the country's major tourism destinations, the Queenstown-Lakes District had solid growth across all indicators between 2002 and 2012. Tourism activity in the Queenstown-Lakes District has grown at least twice as fast as the Tourism sector nationally.

6.4.2 Primary Production sector

The Primary Production sector is a relatively small part of the Queenstown-Lakes District economy. Yet, the Primary Production sector still contributed three percent of the total employment and GDP in the Queenstown-Lakes District in 2012. Most of the activity is in the Agriculture; and Services to Agriculture, Hunting and Trapping industries.

Table 6.9 presents the recent and longer-term contribution of Primary Production employment to the Queenstown-Lakes District economy.

Table 6.9. Primary Production Employment, Queenstown-Lakes District, 2002 - 2012

Primary production sector Employment (FTEs)	Year ending March				%pa change	
	2002	2010	2011	2012	*2011 to 2012*	*2002 to 2012*
Agriculture	481	398	394	383	*-2.8*	*-2.2*
Aquaculture	0	0	0	0	*na*	*na*
Services to Agriculture; Hunting and Trapping	75	69	89	75	*-16.0*	*0.0*
Forestry and Logging	0	0	0	0	*na*	*na*
Mining and services to mining	29	23	23	10	*-56.8*	*-10.1*
Primary production sector	**585**	**490**	**506**	**468**	***-7.6***	***-2.2***
Total employment: Queenstown-Lakes	**10,160**	**14,457**	**14,521**	**15,157**	***4.4***	***4.1***

Source: BERL Regional Database 2012

- In 2012, the Primary Production sector employed 468 FTEs, the majority of which (458) were in the Agriculture; and Services to Agriculture; Hunting and Trapping industries.
- In 2012 and over the last decade, employment growth in the Primary Production sector has declined. This decline has come from employment losses in all industries in the sector.

Table 6.10 presents the recent and longer-term contribution of Primary Production GDP to the Queenstown-Lakes District economy.

Table 6.10. Primary Production GDP, Queenstown-Lakes District, 2002 - 2012

Primary production sector GDP (2012$m)	Year ending March				%pa change	
	2002	2010	2011	2012	*2011 to 2012*	*2002 to 2012*
Agriculture	28.4	25.9	22.5	28.7	*28.0*	*0.1*
Aquaculture	0.0	0.0	0.0	0.0	*na*	*na*
Services to Agriculture; Hunting and Trapping	4.4	4.5	7.9	8.5	*8.5*	*6.8*
Forestry and Logging	0.0	0.0	0.0	0.0	*na*	*na*
Mining and services to mining	6.1	2.1	2.0	0.7	*-66.2*	*-19.7*
Primary production sector	**39.0**	**32.4**	**32.3**	**38.0**	**17.4**	***-0.3***
Total GDP: Queenstown-Lakes	**771.2**	**1,188.6**	**1,192.9**	**1,257.0**	**5.4**	***5.0***

Source: BERL Regional Database 2012

- In 2012, the Primary Production sector GDP totalled $38.0 million, an increase of $5.7 million over 2011.
- Over the decade, the Primary Production sector contracted at an average of 0.3 percent per annum, which is entirely a different direction from the 5.0 percent per annum growth in the District.

Table 6.11 presents the recent and longer-term direct change in Primary Production Business Units in the Queenstown-Lakes District economy.

Table 6.11. Primary Production Business Units, Queenstown-Lakes District, 2002 - 2012

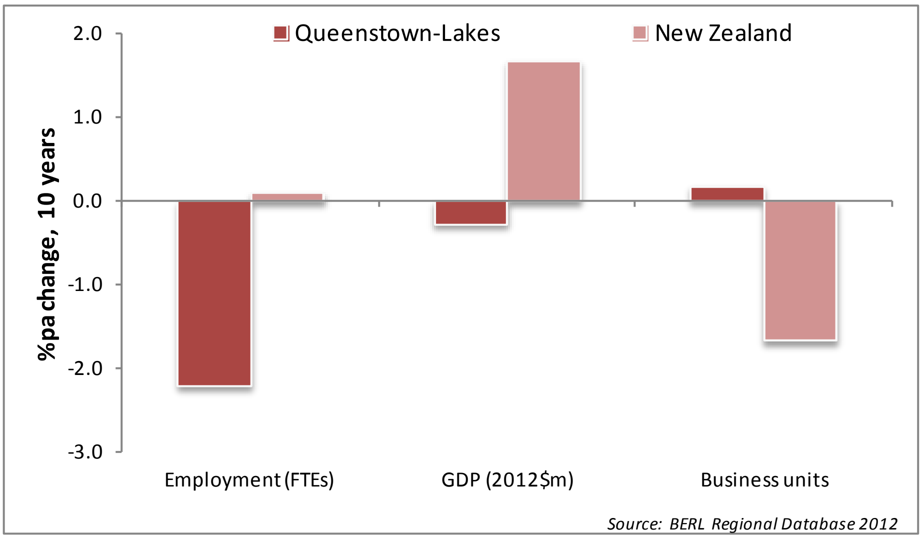
Primary production sector Business units	Year ending March				%pa change	
	2002	2010	2011	2012	*2011 to 2012*	*2002 to 2012*
Agriculture	269	239	235	236	*0.4*	*-1.3*
Aquaculture	0	1	1	2	*100.0*	*na*
Services to Agriculture; Hunting and Trapping	34	56	56	60	*7.1*	*5.8*
Forestry and Logging	15	17	18	21	*16.7*	*3.4*
Mining and services to mining	9	13	13	14	*7.7*	*4.5*
Primary production sector	**327**	**326**	**323**	**333**	**3.1**	***0.18***
Total business units: Queenstown-Lakes	**3,422**	**6,142**	**6,190**	**6,316**	**2.0**	***6.32***

Source: BERL Regional Database 2012

- The Primary Production sector increased by 10 business units in 2012, coming mostly from the Services to Agriculture, Hunting and Trapping industry.

Figure 6.3 shows the change in employment, GDP, and business units in the Primary Production sector in the Queenstown-Lakes District and nationally between 2002 and 2012.

Figure 6.3. Primary Production sector growth, Queenstown-Lakes District vs. New Zealand, 2002 - 2012



The Primary Production sector did not perform well in employment and GDP over the last decade. However, business unit growth is positive as compared to the national growth, which is negative.

6.4.3 Primary Processing sector

The Primary Processing sector is another small sector in the Queenstown-Lakes District, contributing $41.5 million to GDP and employing 304 people in 2012. This employment is spread across 53 business units engaged in Food, Beverage and Tobacco; and Wood and Paper Product Manufacturing industries.

Table 6.12 presents the recent and longer-term contribution of Primary Processing employment to the Queenstown-Lakes District economy.

Table 6.12. Primary Processing Employment, Queenstown-Lakes District, 2002 - 2012

Primary processing sector Employment (FTEs)	Year ending March				%pa change	
	2002	2010	2011	2012	*2011 to 2012*	*2002 to 2012*
Food, Beverage and Tobacco	159	202	178	279	*56.6*	*5.8*
Wood and Paper Product Manufacturing	53	34	32	24	*-25.2*	*-7.5*
Primary processing sector	**211**	**236**	**211**	**304**	***44.0***	***3.7***
Total employment: Queenstown-Lakes	**10,160**	**14,457**	**14,521**	**15,157**	***4.4***	***4.1***

Source: BERL Regional Database 2012

- Employment in the Primary Processing sector increased by 93 FTEs in 2012, up 44 percent. This was a result of 101 FTE increase in the Food, Beverage and Tobacco industry.
- Primary Processing sector employment grew by 3.7 percent per annum over the decade. Employment in the Food, Beverage and Tobacco industry grew, but fell in the Wood and Paper Product Manufacturing industry.

Table 6.13 presents the recent and longer-term contribution of Primary Processing GDP to the Queenstown-Lakes District economy.

Table 6.13. Primary Processing GDP, Queenstown-Lakes District, 2002 - 2012

Primary processing sector GDP (2012$m)	Year ending March				%pa change	
	2002	2010	2011	2012	2011 to 2012	2002 to 2012
Food, Beverage and Tobacco	16.8	26.8	23.5	37.3	59.1	8.3
Wood and Paper Product Manufacturing	6.7	5.7	5.5	4.3	-22.4	-4.4
Primary processing sector	**23.5**	**32.5**	**29.0**	**41.6**	**43.6**	**5.9**
Total GDP: Queenstown-Lakes	**771.2**	**1,188.6**	**1,192.9**	**1,257.0**	**5.4**	**5.0**

Source: BERL Regional Database 2012

- GDP in the sector increased by $12.6 million in 2012, which mainly came from the Food, Beverage and Tobacco industry.
- Over the decade, GDP in the Primary Processing Sector has increased by 5.9 percent per annum. However, growth has come from the Food, Beverage and Tobacco industry (8.3 percent per annum), with the Wood and Paper Product Manufacturing industry having contracted over the decade by 4.4 percent per annum.

Table 6.14 presents the recent and longer-term change in Primary Processing business units in the Queenstown-Lakes District economy.

Table 6.14. Primary Processing Business Units, Queenstown-Lakes District, 2002 - 2012

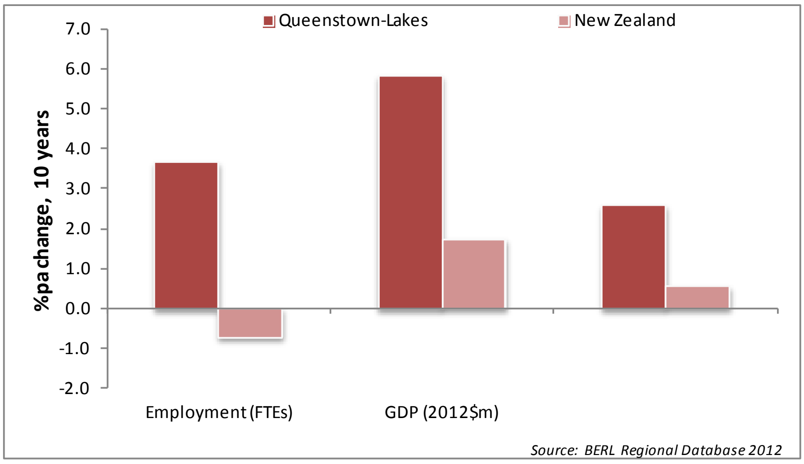
Primary processing sector Business units	Year ending March				%pa change	
	2002	2010	2011	2012	2011 to 2012	2002 to 2012
Food, Beverage and Tobacco	20	31	32	38	18.8	6.6
Wood and Paper Product Manufacturing	21	17	14	15	7.1	-3.3
Primary processing sector	**41**	**48**	**46**	**53**	**15.2**	**2.6**
Total business units: Queenstown-Lakes	**3,422**	**6,142**	**6,190**	**6,316**	**2.0**	**6.3**

Source: BERL Regional Database 2012

- The Primary Processing sector gained seven business units in 2012.

Figure 6.4 shows the change in employment, GDP, and business units in the Primary Processing sector in the Queenstown-Lakes District and nationally between 2002 and 2012.

Figure 6.4. Primary Processing sector growth, Queenstown-Lakes District vs. New Zealand, 2002 - 2012



The Primary Processing sector in the Queenstown-Lakes District has performed over the past decade and it outperformed the Primary Processing sector nationally across all indicators over 2002 to 2012.

6.4.4 Creative sector

The Creative sector employed 380 FTEs in 298 business units and contributed $16.4 million to the Queenstown-Lakes District's economy.

Table 6.15 presents the recent and longer-term contribution of Creative sector employment to the Queenstown-Lakes District economy.

Table 6.15. Creative sector Employment, Queenstown-Lakes District, 2002 - 2012

Creative sector Employment (FTEs)	Year ending March				%pa change	
	2002	2010	2011	2012	2011 to 2012	2002 to 2012
Printing and publishing	66	121	119	118	*-1.3*	*6.0*
Arts and antiques market	0	0	0	3	*na*	*na*
Commercial services	57	135	126	122	*-3.1*	*8.0*
Film, video and television services	68	83	82	82	*0.2*	*2.0*
Music, creative and performing arts and venues	73	45	38	56	*45.9*	*-2.6*
Creative sector	**262**	**383**	**365**	**380**	***4.0***	***3.8***
Total employment: Queenstown-Lakes	**10,160**	**14,457**	**14,521**	**15,157**	***4.4***	***4.1***

Source: BERL Regional Database 2012

- Employment in the Creative sector increased by 15 FTEs in 2012. The largest increase came from the Music, Creative and Performing Arts and Venues industry (18 FTEs).
- Over the last decade, the Creative sector has added 118 FTEs at a rate of 3.8 percent per annum. The fastest rate of growth has been in the Commercial Services industry (8.0 percent per annum), which is now the largest employer in the sector.

Table 6.16 presents the recent and longer-term contribution of Creative sector GDP to the Queenstown-Lakes District economy.

Table 6.16. Creative sector GDP, Queenstown-Lakes District, 2002 - 2012

Creative sector GDP (2012$ m)	Year ending March				%pa change	
	2002	2010	2011	2012	2011 to 2012	2002 to 2012
Printing and publishing	1.0	2.3	1.8	1.8	*2.7*	*6.1*
Arts and antiques market	0.0	0.0	0.0	0.2	*na*	*na*
Commercial services	2.0	5.3	4.4	4.5	*2.2*	*8.5*
Film, video and television services	5.3	5.7	5.9	5.8	*-2.0*	*1.0*
Music, creative and performing arts and venues	5.8	2.9	2.5	4.1	*63.2*	*-3.4*
Creative sector	**14.1**	**16.1**	**14.6**	**16.4**	***12.2***	***1.6***
Total GDP: Queenstown-Lakes	**771.2**	**1,188.6**	**1,192.9**	**1,257.0**	***5.4***	***5.0***

Source: BERL Regional Database 2012

- GDP in the Creative sector increased by $1.8 million, which came mainly from the Music, Creative and Performing Arts and Venues industry ($1.6 million increase).
- Over the decade, GDP in the Creative sector has increased by 1.6 percent per annum. Growth over the decade was mainly from the Commercial Services industry, where GDP growth was 8.5 percent per annum.

Table 6.17 presents the recent and longer-term change in Creative sector business units in the Queenstown-Lakes District economy.

Table 6.17. Creative sector Business Units, Queenstown-Lakes District, 2002 - 2012

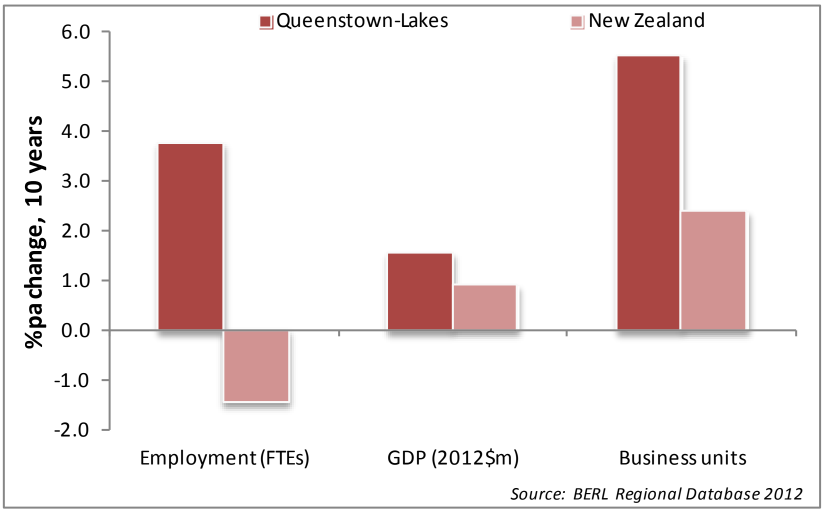
Creative sector Business units	Year ending March				%pa change	
	2002	2010	2011	2012	2011 to 2012	2002 to 2012
Printing and publishing	16	24	25	25	*0.0*	*4.6*
Arts and antiques market	6	2	3	8	*166.7*	*2.9*
Commercial services	62	119	116	126	*8.6*	*7.3*
Film, video and television services	46	67	73	66	*-9.6*	*3.7*
Music, creative and performing arts and venues	44	74	75	73	*-2.7*	*5.2*
Creative sector	**174**	**286**	**292**	**298**	***2.1***	***5.5***
Total business units: Queenstown-Lakes	**3,422**	**6,142**	**6,190**	**6,316**	***2.0***	***6.3***

Source: BERL Regional Database 2012

- The number of business units in the sector slightly increased in 2012, up 2.1 percent or six FTEs. There was a remarkable growth in the Arts and Antiques Market industry, up 166.7 percent or five new establishments. However, the largest increase in business units came from the Commercial Services industry, up by 10 business units.
- Over the last decade, the fastest growth was in the Commercial Services industry.

Figure 6.5 shows the change in employment, GDP and business units in the Creative sector in the Queenstown-Lakes District and nationally between 2002 and 2012.

Figure 6.5. Creative sector growth, Queenstown-Lakes District vs. New Zealand, 2002 - 2012



All indicators in the Queenstown-Lakes District's Creative sector are positive and well-above national average growth.

6.4.5 Education & Research sector

In 2012, there were 72 business units in the Education & Research sector, which employed 643 FTEs and contributed $32.3 million to the Queenstown-Lakes District economy. Short-term and long-term growth has been strong for the District's Education & Research sector. The growth occurred largely due to increased population and the provision of preschool, primary, and secondary education.

Table 6.18 presents the recent and longer-term contribution of Education & Research employment to the Queenstown-Lakes District economy.

Table 6.18. Education & Research Employment, Queenstown-Lakes District, 2002 - 2012

Education & research sector Employment (FTEs)	Year ending March				%pa change	
	2002	2010	2011	2012	*2011 to 2012*	*2002 to 2012*
Preschool Education	47	129	158	159	*0.8*	*13.0*
Primary and Secondary Education	182	248	306	337	*10.3*	*6.4*
Higher Education	0	60	52	72	*38.5*	*na*
Other Education	23	48	84	61	*-27.6*	*10.3*
Scientific Research	3	12	9	15	*67.9*	*18.0*
Education & research sector	**254**	**497**	**608**	**643**	***5.8***	***9.7***
Total employment: Queenstown-Lakes	**10,160**	**14,457**	**14,521**	**15,157**	***4.4***	***4.1***

Source: BERL Regional Database 2012

- Total employment in the sector was up 35 FTEs (5.8 percent) since 2011.
- Over the decade, employment in the sector has averaged 9.7 percent per annum growth, faster than employment growth in the District.

Table 6.19 presents the recent and longer-term contribution of Education & Research GDP to the Queenstown-Lakes District economy.

Table 6.19. Education & Research GDP, Queenstown-Lakes District, 2002 - 2012

Education & research sector GDP (2012$m)	Year ending March				%pa change	
	2002	2010	2011	2012	*2011 to 2012*	*2002 to 2012*
Preschool Education	3.1	6.3	7.7	7.8	*1.9*	*9.6*
Primary and Secondary Education	12.1	12.2	14.9	16.6	*11.5*	*3.2*
Higher Education	0.0	2.9	2.5	3.6	*40.1*	*na*
Other Education	1.5	2.4	4.1	3.0	*-26.8*	*7.0*
Scientific Research	0.3	1.1	0.8	1.4	*70.4*	*16.9*
Education & research sector	**17.0**	**24.9**	**30.0**	**32.4**	***7.8***	***6.6***
Total GDP: Queenstown-Lakes	**771.2**	**1,188.6**	**1,192.9**	**1,257.0**	***5.4***	***5.0***

Source: BERL Regional Database 2012

- Education & Research GDP increased by $2.4 million from $30.0 million in 2011.

Table 6.20 presents the recent and longer-term change in Education & Research business units in the Queenstown-Lakes District economy.

Table 6.20. Education & Research Business Units, Queenstown-Lakes District, 2002 - 2012

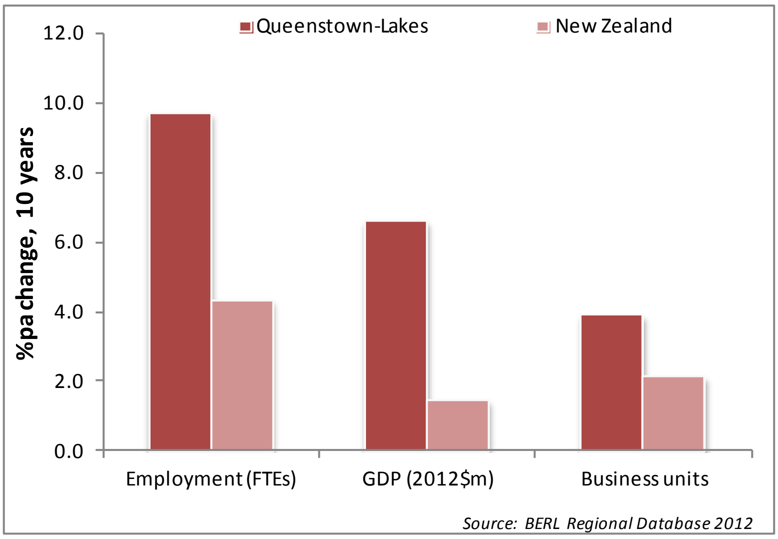
Education & research sector Business units	Year ending March				%pa change	
	2002	2010	2011	2012	*2011 to 2012*	*2002 to 2012*
Preschool Education	10	15	16	17	*6.3*	*5.4*
Primary and Secondary Education	12	12	13	14	*7.7*	*1.6*
Higher Education	0	8	6	10	*66.7*	*na*
Other Education	17	26	28	25	*-10.7*	*3.9*
Scientific Research	10	9	7	6	*-14.3*	*-5.0*
Education & research sector	**49**	**70**	**70**	**72**	***2.9***	***3.9***
Total business units: Queenstown-Lakes	**3,422**	**6,142**	**6,190**	**6,316**	***2.0***	***6.3***

Source: BERL Regional Database 2012

- Education & Research business units stayed steady in 2012. However, Business units have increased significantly over the last decade, driven by rapid growth in Preschool Education and Other Education.

Figure 6.6 shows the change in employment, GDP and business units in the Education & Research sector in the Queenstown-Lakes District and nationally between 2002 and 2012.

Figure 6.6. Education & Research sector growth, Queenstown-Lakes District vs. New Zealand, 2002 - 2012



The Education & Research sector has seen powerful growth in the District since 2002, with more than five percent per annum growth in employment and GDP. Much of this growth was a result of the District's surging population and the increased provision of pre-school, primary and secondary school education.

6.4.6 Engineering, Machinery & Equipment Manufacturing

The Engineering, Machinery & Equipment Manufacturing sector is small in scale relative to other sectors in the District. In 2012, this sector had:

- 121 FTEs, about three quarters of which are employed in the Consultant Engineering Services industry;
- $11.5 million in GDP;
- 79 business units.

Table 6.21 presents the recent and longer-term contribution of Engineering, Machinery & Equipment Manufacturing employment to the Queenstown-Lakes District economy.

Table 6.21. Engineering, Machinery & Equipment Manufacturing Employment, Queenstown-Lakes District, 2002 - 2012

Engineering, machinery & equipment manufacturing sector Employment (FTEs)	Year ending March				%pa change	
	2002	2010	2011	2012	*2011 to 2012*	*2002 to 2012*
Machinery and Equipment Manufacturing	35	32	26	28	*8.5*	*-2.0*
Consultant Engineering Services	23	86	87	93	*6.4*	*14.9*
Engineering, machinery & equipment manufacturing sector	**58**	**119**	**113**	**121**	***6.8***	***7.6***
Total Employment: Queenstown-Lakes	**10,160**	**14,457**	**14,521**	**15,157**	***4.4***	***4.1***

Source: BERL Regional Database 2012

- Employment in the Engineering, Machinery & Equipment Manufacturing sector grew by 6.8 percent in 2012, where both the Machinery and Equipment Manufacturing; and Consultant Engineering Services industries increased by 8.5 percent and 6.4 percent, respectively.
- Over the decade, the sector has grown by 7.6 percent per annum, driven largely by growth in the Consultant Engineering Services industry.

Table 6.22 presents the recent and longer-term contribution of Engineering, Machinery & Equipment Manufacturing GDP to the Queenstown-Lakes District economy.

Table 6.22. Engineering, Machinery & Equipment Manufacturing GDP, Queenstown-Lakes District, 2002 - 2012

Engineering, machinery & equipment manufacturing sector GDP (2012$m)	Year ending March				%pa change	
	2002	2010	2011	2012	2011 to 2012	2002 to 2012
Machinery and Equipment Manufacturing	2.8	2.8	2.5	2.9	17.9	0.5
Consultant Engineering Services	2.4	8.0	8.0	8.6	7.9	13.7
Engineering, machinery & equipment manufacturing sector	**5.2**	**10.7**	**10.5**	**11.5**	**10.3**	**8.3**
Total GDP: Queenstown-Lakes	**771.2**	**1,188.6**	**1,192.9**	**1,257.0**	**5.4**	**5.0**

Source: BERL Regional Database 2012

- In 2012, Engineering, Machinery & Equipment Manufacturing GDP grew by $1.0 million, a 10.3 percent increase.
- Over the last decade, GDP in the Engineering, Machinery & Equipment Manufacturing sector has averaged growth of 8.3 percent per annum. This growth has been led by the Consultant Engineering Services industry.

Table 6.23 presents the recent and longer-term change in Engineering, Machinery & Equipment Manufacturing business units in the Queenstown-Lakes District economy.

Table 6.23. Engineering, Machinery & Equipment Manufacturing Business Units, Queenstown-Lakes, 2002 - 2012

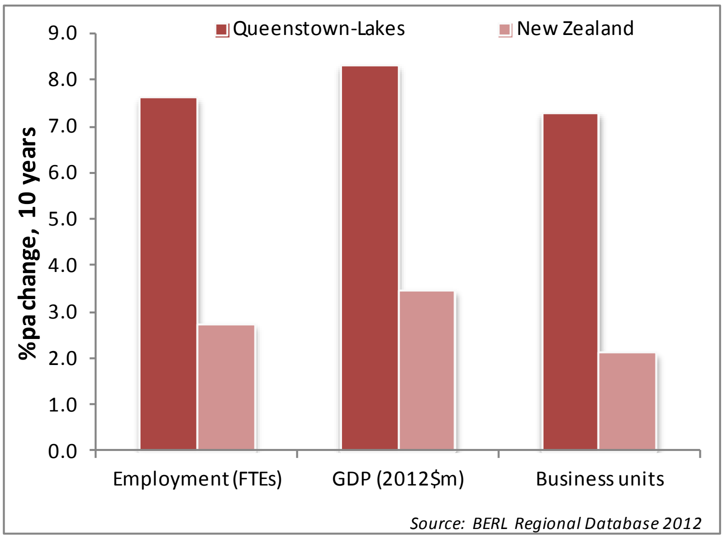
Engineering, machinery & equipment manufacturing sector Business units	Year ending March				%pa change	
	2002	2010	2011	2012	2011 to 2012	2002 to 2012
Machinery and Equipment Manufacturing	16	17	19	19	0.0	1.7
Consultant Engineering Services	23	56	55	60	9.1	10.1
Engineering, machinery & equipment manufacturing sector	**39**	**73**	**74**	**79**	**6.8**	**7.3**
Total Business units: Queenstown-Lakes	**3,422**	**6,142**	**6,190**	**6,316**	**2.0**	**6.3**

Source: BERL Regional Database 2012

- Over the last decade, business units in the sector have doubled, from 39 in 2002 to 79 in 2012.

Figure 6.7 shows the change in employment, GDP, and business units in the Engineering, Machinery & Equipment Manufacturing sector in the Queenstown-Lakes District and nationally between 2002 and 2012.

Figure 6.7. Engineering, Machinery & Equipment Manufacturing sector growth, Queenstown-Lakes District vs. New Zealand, 2002 - 2012



The District has seen extraordinary growth in the Engineering, Machinery & Equipment Manufacturing sector since 2002. It should be noted that, in the two years to 2011, this sector experienced GDP and employment losses, and little growth in the number of business units. However, in the year to March 2012, employment, GDP, and business units all started to increase compared to 2011 levels.

6.4.7 ICT sector

The ICT sector in Queenstown-Lakes District employed 127 FTEs in 94 business units and generated $22.3 million in GDP. The Wholesaling; and Commercial Services industries are the major employment industries in the ICT sector in Queenstown-Lakes District, accounting for 98 percent of employment. The Wholesaling; and Commercial Services industries are also the major contributors to ICT sector's GDP.

Table 6.24 presents the recent and longer-term contribution of ICT employment to the Queenstown-Lakes economy.

Table 6.24. ICT Employment, Queenstown-Lakes, 2002 - 2012

ICT sector Employment (FTEs)	Year ending March				%pa change	
	2002	2010	2011	2012	2011 to 2012	2002 to 2012
Manufacturing	0	0	0	0	*na*	*na*
Wholesaling	15	40	45	61	*35.9*	*14.7*
Telecommunication services	3	6	9	3	*-66.4*	*1.0*
Commercial services	22	59	68	63	*-7.5*	*11.2*
ICT sector	**40**	**105**	**123**	**127**	***3.9***	***12.3***
Total employment: Queenstown-Lakes	**10,160**	**14,457**	**14,521**	**15,157**	***4.4***	***4.1***

Source: BERL Regional Database 2012

- The ICT sector grew by four FTEs in 2012, with an additional 16 FTEs in the Wholesaling industry leading employment growth.
- Over the last decade, the ICT sector averaged 12.3 percent employment growth, compared to 4.1 percent employment growth in the Queenstown-Lakes District.

Table 6.25 presents the recent and longer-term contribution of ICT GDP to the Dunedin City economy between 2002 and 2012.

Table 6.25. ICT GDP, Queenstown-Lakes, 2002 - 2012

ICT sector GDP (2012$m)	Year ending March				%pa change	
	2002	2010	2011	2012	2011 to 2012	2002 to 2012
Manufacturing	0.0	0.0	0.0	0.0	*na*	*na*
Wholesaling	1.8	4.4	5.2	7.2	*37.6*	*14.8*
Telecommunication services	2.4	6.8	10.2	3.2	*-69.1*	*2.8*
Commercial services	13.4	23.4	15.1	12.0	*-20.5*	*-1.1*
ICT sector	**17.6**	**34.6**	**30.6**	**22.4**	***-26.9***	***2.4***
Total GDP: Queenstown-Lakes	**771.2**	**1,188.6**	**1,192.9**	**1,257.0**	***5.4***	***5.0***

Source: BERL Regional Database 2012

- Despite the increase in employment, GDP contribution fell by $8.2 million. This was largely a result of GDP falls in the Telecommunication Services; and Commercial Services industries.

Table 6.26 presents the recent and longer-term change in ICT business units to the Dunedin City economy.

Table 6.26. ICT Business Units, Queenstown-Lakes, 2002 - 2012

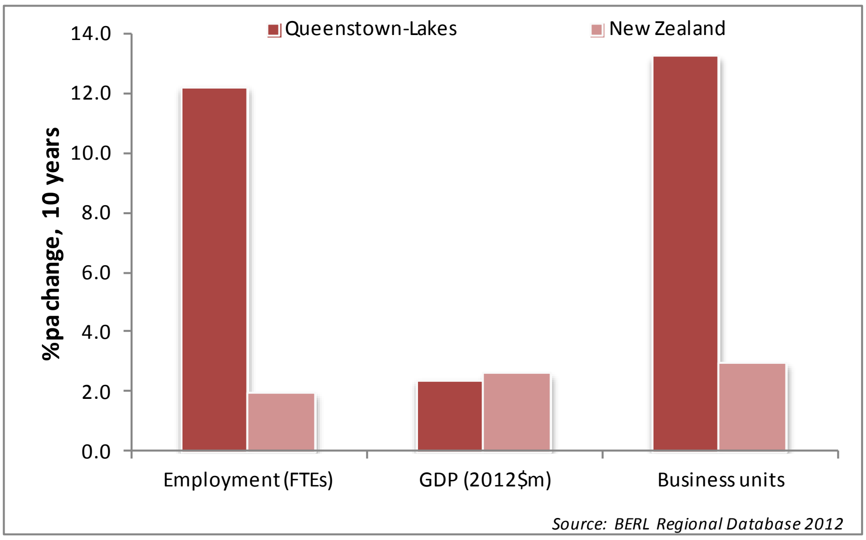
ICT sector Business units	Year ending March				%pa change	
	2002	2010	2011	2012	2011 to 2012	2002 to 2012
Manufacturing	3	1	1	1	*0.0*	*-10.4*
Wholesaling	9	13	13	12	*-7.7*	*2.9*
Telecommunication services	3	2	3	3	*0.0*	*0.0*
Commercial services	12	58	66	78	*18.2*	*20.6*
ICT sector	**27**	**74**	**83**	**94**	***13.3***	***13.3***
Total business units: Queenstown-Lakes	**3,422**	**6,142**	**6,190**	**6,316**	***2.0***	***6.3***

Source: BERL Regional Database 2012

- The number of business units in the ICT sector increased by 11 business units. Over the last decade, the sector has added 67 business units at an average growth rate of 13.3 percent per annum.

Figure 6.8 shows the change in employment, GDP and business units in the ICT sector in Dunedin City and nationally between 2002 and 2012.

Figure 6.8. ICT sector growth, Queenstown-Lakes vs. New Zealand, 2002 - 2012



- Over the past decade, the Queenstown-Lakes Districts' ICT sector has sustained significant gains in employment and business units compared to national levels. Whereas, the ICT sector GDP growth has been lower than that nationally.

7 Waitaki District

7.1 Economy – Waitaki District

Waitaki District employs 10,065 FTEs across 2,858 businesses and generates $1.02 billion in GDP. The Waitaki District has a primary and manufacturing based economy. These sectors provide over half of the District's total GDP, as well as 47 percent of its total employment in the year to 2012.

Table 7.1 shows employment, GDP and business units in the Waitaki District in 2012 by sector.

Table 7.1. GDP, employment and business units, Waitaki District, 2012

Sectors (2012)	FTEs	%	GDP (2012$m)	%	Business units	%
Primary	2,441	*24.2%*	191	*21.3%*	1,039	*36.4%*
Manufacturing	2,315	*23.0%*	295	*33.0%*	93	*3.3%*
Construction	760	*7.5%*	45	*5.1%*	235	*8.2%*
Wholesale and Distribution	519	*5.2%*	67	*7.5%*	135	*4.7%*
Retail Trade and Services	1,572	*15.6%*	87	*9.7%*	398	*13.9%*
Business Services	784	*7.8%*	102	*11.4%*	746	*26.1%*
Arts and Recreation Services	112	*1.1%*	8	*0.9%*	59	*2.1%*
Social Services	1,563	*15.5%*	100	*11.2%*	153	*5.4%*
Sub-total (excluding O.O.D.)	10,065	100.0%	895	100.0%	2,858	100.0%
*Owner-Occupied Dwellings**			129			
Total	**10,065**		**1,024**		**2,858**	

* Imputed value, included in Total GDP only

Source: BERL Regional Database, 2012

Figure 7.1. Manufacturing sector GDP, Otago Region, 2012

In relation to employment, activity is spread relatively equally across the Primary (24.2 percent), and Manufacturing (23.0 percent), Retail Trade Services (15.6 percent) and Social Services (15.5 percent) industries. In relation to GDP, the key sectors are Manufacturing (33.0 percent), Primary sector (21.3 percent); Business Services (11.4 percent); and the Social Services (11.2 percent) sectors.

Figure 7.1 presents the Manufacturing sector GDP growth on a map. The map shows that the Waitaki; Central Otago and Queenstown-Lakes Districts had above average GDP growth. However, it was the Waitaki District, which had the highest Manufacturing sector GDP growth of 15.3 percent.

7.2 Economic performance – Waitaki District

Table 7.2 presents the performance of the Waitaki District across seven key performance indicators for 2012.

Table 7.2. Key performance indicators, Waitaki District, 2012

Key Performance Indicators	%pa for 2012 year		
	Waitaki	Otago Region	New Zealand
Resident population growth	**0.0**	0.6	0.6
GDP growth	**7.0**	2.8	1.9
GDP per capita growth	**7.0**	2.2	1.3
Employment growth	**2.3**	0.7	1.0
Labour productivity growth	**5.5**	2.4	1.0
Business units growth	**0.9**	0.6	-0.2
Business size growth	**1.4**	0.1	1.2

Source: BERL Regional Database, 2012

In 2012, employment growth in the Waitaki District was higher than both regional and national employment growth. The number of FTEs in the District increased by 224 FTEs, from 9,841 FTEs in 2011 to 10,065 FTEs in 2012.

The leading contributors to GDP and employment growth in 2012 are sheep-cattle, dairy farming, and gold-ore mining activities.

Due to a total increase of 35 business units in the Sheep Farming (Specialised) and Dairy Cattle Farming, there was a significant increase of 297 FTEs in Meat Processing industry in the Waitaki District.

Table 7.3 shows the 10-year performance of key indicators in the Waitaki District compared to the regional and national indicators.

Table 7.3. 10-year Key performance indicators, Waitaki District, 2002 to 2012

Key Performance Indicators	%pa for 2002 - 2012		
	Waitaki	Otago Region	New Zealand
Resident population growth	**0.2**	1.0	1.2
GDP growth	**3.0**	2.2	2.3
GDP per capita growth	**2.8**	1.2	1.1
Employment growth	**2.0**	1.8	1.8
Labour productivity growth	**1.3**	0.4	0.5
Business units growth	**1.4**	2.7	2.1
Business size growth	**0.6**	-0.8	-0.3

Source: BERL Regional Database, 2012

Over the long-term, the Waitaki District has faced slow population growth; a situation encountered by most rural districts throughout New Zealand. As a result, the Waitaki District had higher GDP per capita growth than regionally and nationally, particularly as employment and GDP growth has kept pace with the region and nationally.

7.2.1 Fastest growing industries in Waitaki District

Table 7.4 presents the 10 fastest growing industries in the Waitaki District by FTE growth.

Table 7.4. Ten fastest growing industries by FTE growth, Waitaki District, 2002 to 2012

Rank by FTE growth	Industry	Employment (FTEs)		
		2002	**2012**	**%pa growth**
1	Social Assistance Services	28	215	22.4
2	Metal Ore Mining	141	513	13.8
3	Medical and Other Health Care Services	87	185	7.8
4	Basic Material Wholesaling	67	140	7.6
5	Repair and Maintenance	77	123	4.8
6	Professional Scientific and Technical Services (exc Comp Sys Dsn & related)	171	272	4.8
7	Hospitals	110	154	3.4
8	Food Product Manufacturing	1,319	1,767	3.0
9	Residential Care Services	217	276	2.4
10	Agriculture Forestry and Fishing Support Services	168	211	2.3

Source: BERL Regional Database, 2012

In growth rate terms, the Social Assistance Services is the fastest growing industry in the District, increasing from 28 FTEs in 2002 to 215 FTEs in 2012. In terms of magnitude, the Food Manufacturing industry has seen rapid employment growth, expanding from 1,319 FTEs in 2002 to 1,767 FTEs in 2012.

7.3 Key sectors – Waitaki District

This section presents the recent and longer-term contribution of employment, GDP and business units in the six key sectors in the Waitaki District. Statistics on dairy and sheep have been added to the key sectors in the Waitaki District.

7.3.1 Dairy and Sheep

Dairy cattle, sheep-beef cattle farming, and sheep farming activities have a combined employment of 1,263 FTEs.

Table 7.5 summarises five indicators relating to dairy and sheep farming in the Waitaki District and New Zealand for the latest eight years.

Table 7.5. Summary of dairy and sheep statistics, Waitaki District, 2005 to 2012

Dairy and Sheep	2005	2006	2007	2008	2009	2010	2011	2012	%pa change 2011 to 2012	%pa change 2005 to 2012
number of dairy herds										
Waitaki District	84	88	94	98	105	112	119	125	*5.5*	*5.1*
New Zealand	12,271	11,883	11,630	11,436	11,618	11,691	11,735	11,798	*0.5*	*-0.5*
total cows ('000)										
Waitaki District	49.2	51.0	57.0	62.7	66.9	73.4	81.8	90.3	*10.3*	*7.9*
New Zealand	3,867.7	3,832.1	3,916.8	4,012.9	4,252.9	4,396.7	4,528.7	4,634.2	*2.3*	*2.3*
total effective dairy ha ('000)										
Waitaki District	16.3	17.1	19.1	20.3	21.2	23.3	25.1	26.9	*7.1*	*6.4*
New Zealand	1,411.6	1,399.0	1,412.9	1,436.5	1,519.1	1,563.5	1,638.7	1,638.5	*0.0*	*1.9*
average kilograms of milk solids per ha										
Waitaki/ Central Otago District	1,074	1,072	1,165	1,192	1,192	959	1,125	1,292	*14.8*	*2.3*
New Zealand	862	907	934	873	921	912	923	1,028	*11.4*	*2.2*
total sheep ('000)										
Waitaki District	880	909	891	978	747	751	718	720	*0.2*	*-2.5*
New Zealand	39,880	40,098	38,568	34,088	32,357	32,563	31,132	31,199	*0.2*	*-3.0*

* 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: Livestock Improvement Corporation, Beef + Lamb NZ

The Waitaki District continues to outperform national growth in terms of:

- Dairy farming across all indicators, with increases in herds, cows, hectares under production and productivity (milk solids per hectare) between 2005 and 2012.
- Average kilograms of milk solids per hectare. On average, dairy farms in New Zealand produced 1,028 kilograms of milk solids per hectare in 2012. The figure for Waitaki was 1,292 kilograms.

7.3.2 Tourism sector

The Tourism sector employs 719 FTEs and generates $42.3 million in GDP for the Waitaki District.

Table 7.6 presents the contribution of tourism to employment, GDP and business units in the Waitaki District in 2012.

Table 7.6. Tourism sector's contribution to Waitaki District's local economy, 2012

Role of tourism in local economy	Employment	%	GDP ($2012m)	%	Number of Business Units	%
Tourism-characteristic industries	472	*4.7%*	22.4	*2.2%*	131	*4.6%*
Tourism-related industries	139	*1.4%*	9.9	*1.0%*	27	*1.0%*
All non-tourism-related industries	107	*1.1%*	10.1	*1.0%*	30	*1.1%*
Waitaki	**719**	***7.1%***	**42.4**	***4.1%***	**188**	***6.6%***
New Zealand	**102,453**	***5.5%***	**7,458.5**	***3.6%***	**20,739**	***4.1%***

206,546 *urce: BERL Regional Database 2012*

- Activity related to tourism is higher in the Waitaki District than for New Zealand, accounting for 7.1 percent of employment, 4.1 percent of GDP and 6.6 percent of business units.

Table 7.7 presents the recent and longer-term contribution of tourism employment to the Waitaki District economy.

Table 7.7. Tourism Employment, Waitaki District, 2002 - 2012

Tourism Employment (FTEs)	Years ending March				%pa change	
	2002	2010	2011	2012	2011 to 2012	2002 to 2012
Tourism-characteristic industries	387	510	491	472	-3.8	2.0
Tourism-related industries	136	137	145	139	-3.8	0.2
All non-tourism-related industries	70	98	100	107	6.8	4.3
Tourism Sector	**594**	**746**	**736**	**719**	**-2.3**	**1.9**
Total Employment: Waitaki	**8,250**	**9,516**	**9,841**	**10,065**	**2.3**	**2.0**

Source: BERL Regional Database 2012

- Employment growth in the latest year had been negative, with 17 fewer jobs than a year ago. Over the last ten years, employment increased at 1.9 percent per annum.

Table 7.8 presents the recent and longer-term contribution of tourism GDP to the Waitaki District economy.

Table 7.8. Tourism GDP, Waitaki District, 2002 - 2012

Tourism GDP (2012$m)	Years ending March				%pa change	
	2002	2010	2011	2012	2011 to 2012	2002 to 2012
Tourism-characteristic industries	17	26	24	22	-5.8	2.8
Tourism-related industries	6	9	10	10	2.9	4.9
All non-tourism-related industries	6	9	9	10	9.6	5.2
Tourism Sector	**29**	**44**	**43**	**42**	**-0.5**	**3.8**
Total GDP: Waitaki	**759**	**957**	**957**	**1,024**	**7.0**	**3.0**

Source: BERL Regional Database 2012

- The Tourism sector contributed about $1 million less to the Waitaki District economy in 2012 than it did in 2011.

Table 7.9 presents the recent and longer-term change in tourism business units in the Waitaki District economy.

Table 7.9. Tourism Business Units, Waitaki District, 2002 - 2012

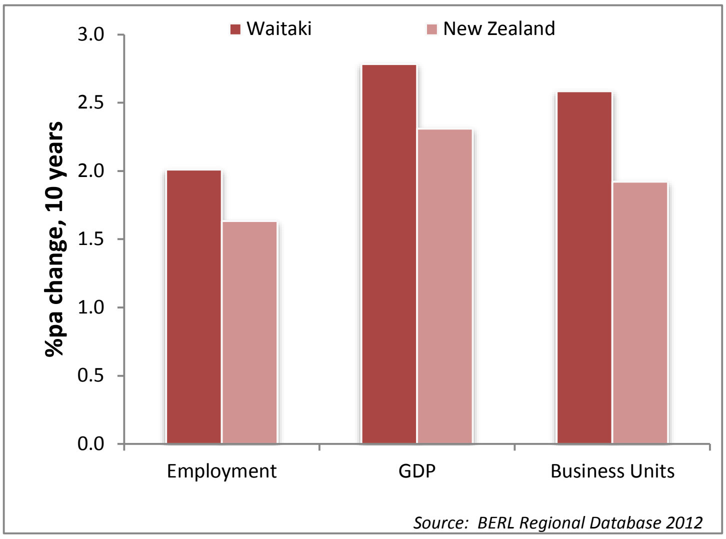
Tourism Business units	Years ending March				%pa change	
	2002	2010	2011	2012	2011 to 2012	2002 to 2012
Tourism-characteristic industries	101	131	129	131	1.3	2.6
Tourism-related industries	24	29	28	27	-2.2	1.5
All non-tourism-related industries	22	29	28	30	6.8	3.3
Tourism Sector	**147**	**189**	**185**	**188**	**1.7**	**2.5**
Total Business Units: Waitaki	**2,476**	**2,867**	**2,833**	**2,858**	**0.9**	**1.4**

Source: BERL Regional Database 2012

- The number of business units directly related to the Tourism sector has grown at 2.5 percent per annum, slightly better than the 1.4 percent growth per annum in business units in the Waitaki District.

Figure 7.2 shows the change in employment, GDP, and business units in the Tourism sector in the Waitaki District and nationally between 2002 and 2012.

Figure 7.2. Tourism sector growth, Waitaki District vs. New Zealand, 2002 - 2012



- For the past ten years, the Waitaki District had positive gains in all three indicators and faster than the national trends

7.3.3 Primary Production sector

In 2012, the Primary Production sector in the Waitaki District employed 2,441 FTEs in 1,039 business units, and contributed $190.3 million to the local economy. The sector is dominated by the Agriculture industry, which, together with Services to Agriculture; Hunting and Trapping accounts for 77 percent of employment. Mining and Services to Mining contributes a further 23 percent. Both Forestry and Logging; and Aquaculture are very small industries in the Waitaki District economy.

Table 7.10 presents the recent and longer-term contribution of Primary Production employment to the Waitaki District economy.

Table 7.10. Primary Production Employment, Waitaki District, 2002 - 2012

Primary production sector Employment (FTEs)	Year ending March				%pa change	
	2002	2010	2011	2012	*2011 to 2012*	*2002 to 2012*
Agriculture	1,350	1,399	1,505	1,657	*10.1*	*2.1*
Aquaculture	0	0	10	10	*0.8*	*na*
Services to Agriculture; Hunting and Trapping	184	215	208	218	*4.6*	*1.7*
Forestry and Logging	0	6	6	3	*-49.6*	*na*
Mining and services to mining	200	424	559	552	*-1.2*	*10.7*
Primary production sector	**1,734**	**2,044**	**2,289**	**2,441**	***6.6***	***3.5***
Total employment: Waitaki District	**8,250**	**9,516**	**9,841**	**10,065**	***2.3***	***2.0***

Source: BERL Regional Database 2012

- The Primary Production sector added 152 FTE in 2012, the majority of these in the Agriculture industry (152 FTEs). The industries where employment dropped were Forestry and Logging; and Mining and Services to Mining (10 FTEs), which were offset by the increase in the Services to Agriculture, Hunting and Trapping industry.
- Over the decade, the sector has grown faster than the rate of FTE growth in the Waitaki District, led by the Mining and Services to Mining industry, which has grown by 10.7 percent per annum.

Table 7.11 presents the recent and longer-term contribution of Primary Production GDP to the Waitaki District economy.

Table 7.11. Primary Production GDP, Waitaki District, 2002 - 2012

Primary production sector GDP (2012$m)	Year ending March				%pa change	
	2002	2010	2011	2012	*2011 to 2012*	*2002 to 2012*
Agriculture	79.9	90.9	85.8	124.4	*44.9*	*4.5*
Aquaculture	0.0	0.0	6.2	6.7	*7.4*	*na*
Services to Agriculture; Hunting and Trapping	18.8	18.3	16.1	20.8	*29.1*	*1.0*
Forestry and Logging	0.0	2.8	2.9	1.5	*-48.6*	*na*
Mining and services to mining	42.1	38.5	48.4	37.5	*-22.6*	*-1.1*
Primary production sector	**140.8**	**150.5**	**159.4**	**190.8**	**19.7**	***3.1***
Total GDP: Waitaki District	**759.5**	**957.3**	**956.9**	**1,023.6**	**7.0**	***3.0***

Source: BERL Regional Database 2012

- The Primary Production sector increased GDP by $31.4 million in 2012, with the Agriculture industry increasing its GDP by almost 45 percent.

Table 7.12 presents the recent and longer-term change in Primary Production business units in the Waitaki District economy.

Table 7.12. Primary Production Business Units, Waitaki District, 2002 - 2012

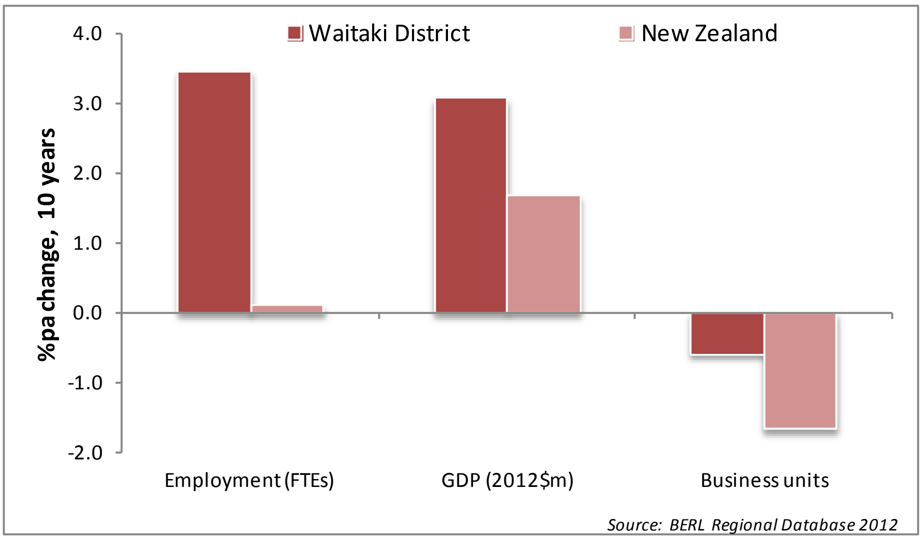
Primary production sector Business units	Year ending March				%pa change	
	2002	2010	2011	2012	*2011 to 2012*	*2002 to 2012*
Agriculture	933	880	865	896	*3.6*	*-0.4*
Aquaculture	2	1	2	2	*0.0*	*0.0*
Services to Agriculture; Hunting and Trapping	90	92	82	81	*-1.2*	*-1.0*
Forestry and Logging	69	49	53	54	*1.9*	*-2.4*
Mining and services to mining	8	6	5	6	*20.0*	*-2.8*
Primary production sector	**1,102**	**1,028**	**1,007**	**1,039**	***3.2***	***-0.6***
Total business units: Waitaki District	**2,476**	**2,867**	**2,833**	**2,858**	***0.9***	***1.4***

Source: BERL Regional Database 2012

- The number of business units in the Primary Production sector has increased by 3.2 percent. There have been 31 new business units in the Agriculture industry.

Figure 7.3 shows the change in employment, GDP and business units in the Primary Production sector in the Waitaki District and nationally between 2002 and 2012.

Figure 7.3. Primary Production sector growth, Waitaki District vs. New Zealand, 2002 - 2012



- Over the last decade, the Primary Production sector in the Waitaki District has grown at over twice the rate of the sector nationally in relation to employment and GDP.

7.3.4 Primary Processing sector

The Primary Processing sector employed 1,835 FTEs in 32 business units and contributed $247.6 million to the Waitaki District's economy in 2012. The major industry in the Waitaki District's Primary Processing sector is the Food, Beverage and Tobacco industry, which accounts for 96 percent of employment and 95 percent of GDP in the sector.

Table 7.13 presents the recent and longer-term contribution of Primary Processing employment to the Waitaki District economy.

Table 7.13. Primary Processing Employment, Waitaki District, 2002 - 2012

Primary processing sector Employment (FTEs)	Year ending March				%pa change	
	2002	2010	2011	2012	2011 to 2012	2002 to 2012
Food, Beverage and Tobacco	1,319	1,548	1,478	1,767	*19.6*	*3.0*
Wood and Paper Product Manufacturing	84	80	76	68	*-10.3*	*-2.0*
Primary processing sector	**1,403**	**1,628**	**1,554**	**1,835**	***18.1***	***2.7***
Total employment: Waitaki District	**8,250**	**9,516**	**9,841**	**10,065**	***2.3***	***2.0***

Source: BERL Regional Database 2012

- The Primary Processing sector grew by having additional 281 FTEs in 2012, mainly because of growth in the Food, Beverage and Tobacco industry. Employment in the Wood and Paper Product Manufacturing industry has been declining for the past few years..

Table 7.14 presents the recent and longer-term contribution of Primary Processing GDP to the Waitaki District economy.

Table 7.14. Primary Processing GDP, Waitaki District, 2002 - 2012

Primary processing sector GDP (2012$m)	Year ending March				%pa change	
	2002	2010	2011	2012	2011 to 2012	2002 to 2012
Food, Beverage and Tobacco	140.2	205.1	194.4	236.2	*21.5*	*5.4*
Wood and Paper Product Manufacturing	10.6	13.4	12.9	12.0	*-6.9*	*1.2*
Primary processing sector	**150.8**	**218.6**	**207.3**	**248.2**	***19.7***	***5.1***
Total GDP: Waitaki District	**759.5**	**957.3**	**956.9**	**1,023.6**	***7.0***	***3.0***

Source: BERL Regional Database 2012

- The Primary Processing sector generated $40.9 million more in GDP in 2012 than in 2011.
- Over the decade, the Primary Processing sector has grown at 5.1 percent per annum compared to 3.0 percent for the Waitaki District as a whole.

Table 7.15 presents the recent and longer-term change in Primary Processing business units in the Waitaki District economy.

Table 7.15. Primary Processing Business Units, Waitaki District, 2002 - 2012

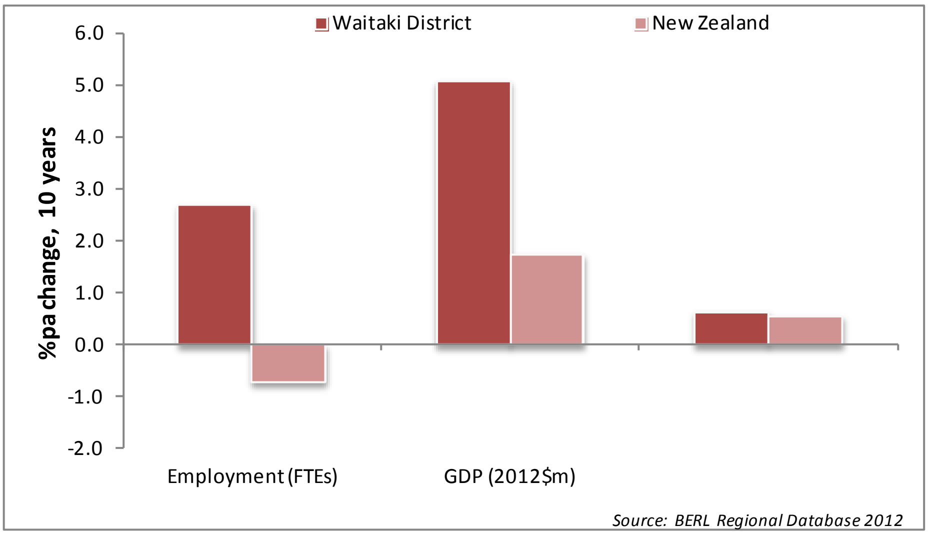
Primary processing sector Business units	Year ending March				%pa change	
	2002	2010	2011	2012	2011 to 2012	2002 to 2012
Food, Beverage and Tobacco	18	16	19	17	*-10.5*	*-0.6*
Wood and Paper Product Manufacturing	12	16	17	15	*-11.8*	*2.3*
Primary processing sector	**30**	**32**	**36**	**32**	***-11.1***	***0.6***
Total business units: Waitaki District	**2,476**	**2,867**	**2,833**	**2,858**	***0.9***	***1.4***

Source: BERL Regional Database 2012

- Contractions in the Primary Processing sector's industries in 2012 led to a net reduction of four business units. Over the decade, there was slight growth in its business units.

Figure 7.4 shows the change in employment, GDP and business units in the Primary Processing sector in the Waitaki District and nationally between 2002 and 2012.

Figure 7.4. Primary Processing sector growth, Waitaki District vs. New Zealand, 2002 - 2012



- Employment and GDP growth in this sector has been relatively low when compared to growth experienced in previous years. However, this growth is still above the national average over the past 10 years. Strong employment and GDP growth in the early 2000s have balanced the almost stagnant growth in FTE numbers in the last three years.

7.3.5 Creative sector

The Creative sector employed 145 FTEs in 39 Business Units, and generated $3.7 million in GDP in 2012. The Printing and Publishing industry is the main industry in the Creative sector in the Waitaki District, accounting for around 72 percent of employment in the sector.

Table 7.16 presents the recent and longer-term contribution of Creative sector employment to the Waitaki District economy.

Table 7.16. Creative sector Employment, Waitaki District, 2002 - 2012

Creative sector Employment (FTEs)	Year ending March				%pa change	
	2002	2010	2011	2012	*2011 to 2012*	*2002 to 2012*
Printing and publishing	71	89	106	104	*-2.1*	*3.9*
Arts and antiques market	13	2	0	0	*na*	*-100.0*
Commercial services	6	12	12	9	*-24.4*	*4.7*
Film, video and television services	16	20	21	21	*0.8*	*3.3*
Music, creative and performing arts and venues	8	10	14	11	*-20.2*	*2.9*
Creative sector	**113**	**134**	**153**	**145**	***-5.0***	***2.5***
Total employment: Waitaki District	**8,250**	**9,516**	**9,841**	**10,065**	***2.3***	***2.0***

Source: BERL Regional Database 2012

- In 2012, employment in the Creative sector declined by eight FTEs. These losses were mainly from the Commercial Services; and Music, Creative and Performing Arts and Venues industries.
- The biggest employers within the sector are the Printing and Publishing; and Film, Video and Television Services industries.

Table 7.17 presents the recent and longer-term contribution of Creative sector GDP to the Waitaki District economy.

Table 7.17. Creative sector GDP, Waitaki District, 2002 - 2012

Creative sector GDP (2012$ m)	Year ending March				%pa change	
	2002	2010	2011	2012	*2011 to 2012*	*2002 to 2012*
Printing and publishing	0.4	0.5	0.5	0.4	*-12.9*	*0.6*
Arts and antiques market	0.6	0.2	0.0	0.0	*na*	*-100.0*
Commercial services	0.6	0.8	0.8	0.8	*2.2*	*3.6*
Film, video and television services	1.2	1.4	1.5	1.5	*-1.5*	*2.2*
Music, creative and performing arts and venues	0.9	0.8	1.2	1.0	*-20.4*	*1.4*
Creative sector	**3.6**	**3.7**	**4.1**	**3.7**	***-7.9***	***0.3***
Total GDP: Waitaki District	**759.5**	**957.3**	**956.9**	**1,023.6**	***7.0***	***3.0***

Source: BERL Regional Database 2012

- There has been a contraction in the GDP growth of the Creative sector in 2012, with a decline of 7.9 percent, equivalent to a loss of around $400,000.
- Over the last decade, GDP growth in the Creative sector has slightly increased with growth of 0.3 percent per annum.

Table 7.18 presents the recent and longer-term change in Creative sector business units in the Waitaki District economy.

Table 7.18. Creative sector Business Units, Waitaki District, 2002 - 2012

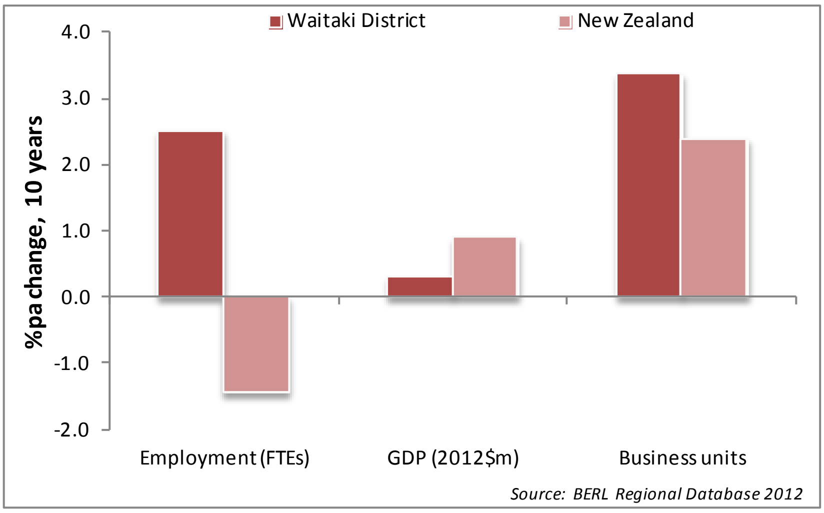
Creative sector Business units	Year ending March				%pa change	
	2002	2010	2011	2012	*2011 to 2012*	*2002 to 2012*
Printing and publishing	5	7	9	10	*11.1*	*7.2*
Arts and antiques market	9	6	4	4	*0.0*	*-7.8*
Commercial services	6	9	11	11	*0.0*	*6.2*
Film, video and television services	4	6	5	5	*0.0*	*2.3*
Music, creative and performing arts and venues	4	9	11	9	*-18.2*	*8.4*
Creative sector	**28**	**37**	**40**	**39**	***-2.5***	***3.4***
Total business units: Waitaki District	**2,476**	**2,867**	**2,833**	**2,858**	***0.9***	***1.4***

Source: BERL Regional Database 2012

- Business units in the Creative sector in Waitaki decreased by one, or 2.5 percent.
- Over the decade, business unit growth in the Creative sector has averaged 3.4 percent per annum, well above the 1.4 percent business unit growth across all industries in the Waitaki District.

Figure 7.5 shows the change in employment, GDP and business units in the Creative sector in the Waitaki District and nationally between 2002 and 2012.

Figure 7.5. Creative sector growth, Waitaki District vs. New Zealand, 2002 - 2012



- The Creative sector saw moderate growth in the Waitaki District between 2002 and 2012, with above national average annual increases in employment and business units.

7.3.6 Education & Research sector

In 2012, the Education & Research sector contributed $28.0 million to the Waitaki District's total GDP, employing 548 FTEs across 53 business units. Primary and Secondary Education is the main industry in the sector, while Higher Education has grown the fastest over the last decade.

Table 7.19 presents the recent and longer-term contribution of Education & Research employment to the Waitaki District economy.

Table 7.19. Education & Research Employment, Waitaki District, 2002 - 2012

Education & research sector Employment (FTEs)	Year ending March				%pa change	
	2002	2010	2011	2012	*2011 to 2012*	*2002 to 2012*
Preschool Education	30	51	57	57	*0.8*	*6.8*
Primary and Secondary Education	448	437	437	437	*-0.1*	*-0.2*
Higher Education	4	16	11	14	*25.9*	*12.5*
Other Education	6	32	34	15	*-55.2*	*9.0*
Scientific Research	45	53	68	24	*-64.0*	*-6.0*
Education & research sector	**534**	**589**	**607**	**548**	***-9.7***	***0.3***
Total employment: Waitaki District	**8,250**	**9,516**	**9,838**	**10,065**	***2.3***	***2.0***

Source: BERL Regional Database 2012

- The Education & Research sector contracted by 59 FTE jobs in 2012.
- Over the decade, the Education & Research sector has grown at 0.3 percent per annum, a slower rate compared to the employment growth rate of the Waitaki District.

Table 7.20 presents the recent and longer-term contribution of Education & Research GDP to the Waitaki District economy.

Table 7.20. Education & Research GDP, Waitaki District, 2002 - 2012

Education & research sector GDP (2012$m)	Year ending March				%pa change	
	2002	2010	2011	2012	2011 to 2012	2002 to 2012
Preschool Education	2.0	2.5	2.8	2.8	*1.9*	*3.6*
Primary and Secondary Education	29.9	21.5	21.3	21.6	*1.1*	*-3.2*
Higher Education	0.3	0.8	0.5	0.7	*27.4*	*9.1*
Other Education	0.4	1.6	1.7	0.8	*-54.7*	*5.8*
Scientific Research	4.7	4.9	6.2	2.3	*-63.5*	*-7.0*
Education & research sector	**37.2**	**31.2**	**32.5**	**28.1**	***-13.6***	***-2.8***
Total GDP: Waitaki District	**759.5**	**957.3**	**956.9**	**1,023.6**	***7.0***	***3.0***

Source: BERL Regional Database 2012

- In 2012, GDP generated by the Education & Research sector decreased by $4.4 million.
- Over the decade, there has been a decline in growth in GDP (2.8 percent per annum), contracting by $9.1 million in total over that period.

Table 7.21 presents the recent and longer-term change in Education & Research business units to the Waitaki District economy.

Table 7.21. Education & Research Business Units, Waitaki District, 2002 - 2012

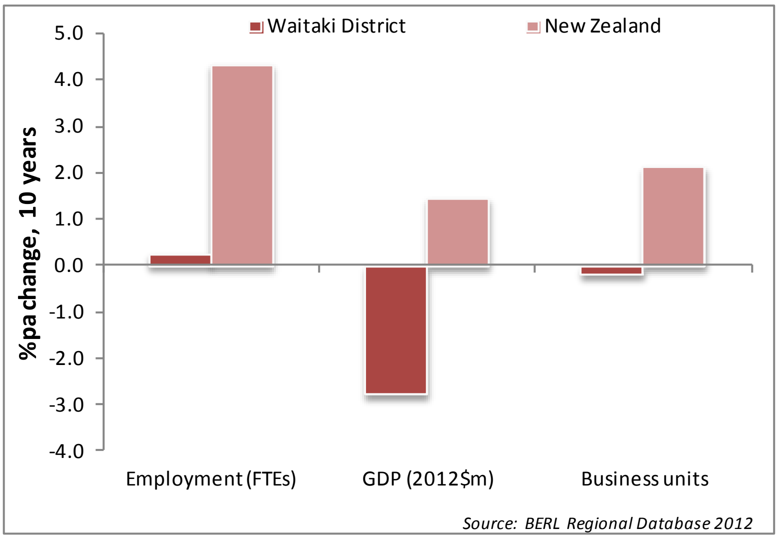
Education & research sector Business units	Year ending March				%pa change	
	2002	2010	2011	2012	2011 to 2012	2002 to 2012
Preschool Education	12	12	12	12	*0.0*	*0.0*
Primary and Secondary Education	27	25	23	24	*4.3*	*-1.2*
Higher Education	1	2	1	1	*0.0*	*0.0*
Other Education	8	10	9	9	*0.0*	*1.2*
Scientific Research	6	7	7	7	*0.0*	*1.6*
Education & research sector	**54**	**56**	**52**	**53**	***1.9***	***-0.2***
Total business units: Waitaki District	**2,476**	**2,867**	**2,833**	**2,858**	***0.9***	***1.4***

Source: BERL Regional Database 2012

- The number of business units has remained relatively constant over the year and the decade.

Figure 7.6 shows the change in employment, GDP and business units in the Education & Research sector in Waitaki District and nationally between 2002 and 2012.

Figure 7.6. Education & Research sector growth, Waitaki District vs. New Zealand, 2002 - 2012



Employment, GDP and business units in the sector did not perform well over the last decade as GDP and the number of business units contracted, while employment grew at a slower rate than nationally.

7.3.7 Engineering, Machinery & Equipment Manufacturing

Waitaki District's Engineering, Machinery & Equipment Manufacturing sector is relatively small, employing 63 FTEs in 24 business units and generating $6.1 million in GDP in 2012. Within the Waitaki District, only one industry – Machinery and Equipment Manufacturing – is active.

Table 7.22 presents the recent and longer-term contribution of Engineering, Machinery & Equipment Manufacturing employment to the Waitaki District economy.

Table 7.22. Engineering, Machinery & Equipment Manufacturing Employment, Waitaki District, 2002 - 2012

Engineering, machinery & equipment manufacturing sector Employment (FTEs)	Year ending March				%pa change	
	2002	2010	2011	2012	2011 to 2012	2002 to 2012
Machinery and Equipment Manufacturing	31	80	65	63	-2.4	7.5
Consultant Engineering Services	3	3	0	0	na	-100.0
Engineering, machinery & equipment manufacturing sector	**34**	**83**	**65**	**63**	**-2.4**	**6.5**
Total Employment: Waitaki District	**8,250**	**9,516**	**9,841**	**10,065**	**2.3**	**2.0**

Source: BERL Regional Database 2012

- Employment in the sector fell by 2.4 percent in 2012. Over the decade, the sector has grown by 6.5 percent per annum, with all growth coming from the Machinery and Equipment Manufacturing industry.

Table 7.23 presents the recent and longer-term contribution of Engineering, Machinery & Equipment Manufacturing GDP to the Waitaki District economy.

Table 7.23. Engineering, Machinery & Equipment Manufacturing GDP, Waitaki District, 2002 - 2012

Engineering, machinery & equipment manufacturing sector GDP (2012$m)	Year ending March				%pa change	
	2002	2010	2011	2012	*2011 to 2012*	*2002 to 2012*
Machinery and Equipment Manufacturing	2.6	6.8	6.1	6.1	*-0.2*	*8.9*
Consultant Engineering Services	0.3	0.3	0.0	0.0	*na*	*-100.0*
Engineering, machinery & equipment manufacturing sector	**2.9**	**7.1**	**6.1**	**6.1**	***-0.2***	***7.7***
Total GDP: Waitaki District	**759.5**	**957.3**	**956.9**	**1,023.6**	***7.0***	***3.0***

Source: BERL Regional Database 2012

- In 2012, GDP in the Engineering, Machinery & Equipment Manufacturing sector remained the same at $6.1 million.
- Over the decade, GDP growth in Machinery and Equipment Manufacturing industry has averaged 7.7 percent growth per annum.

Table 7.24 presents the recent and longer-term change in Engineering, Machinery & Equipment Manufacturing business units in the Waitaki District economy.

Table 7.24. Engineering, Machinery & Equipment Manufacturing Business Units, Waitaki District, 2002 - 2012

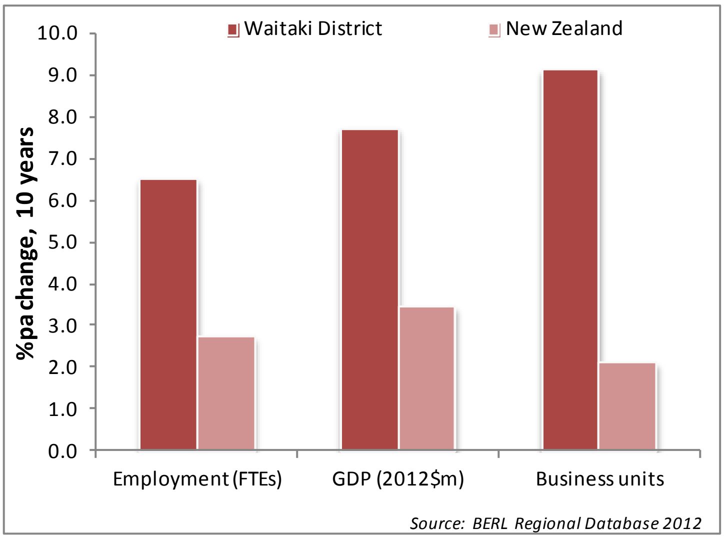
Engineering, machinery & equipment manufacturing sector Business units	Year ending March				%pa change	
	2002	2010	2011	2012	*2011 to 2012*	*2002 to 2012*
Machinery and Equipment Manufacturing	5	14	14	15	*7.1*	*11.6*
Consultant Engineering Services	5	9	8	9	*12.5*	*6.1*
Engineering, machinery & equipment manufacturing sector	**10**	**23**	**22**	**24**	***9.1***	***9.1***
Total Business units: Waitaki District	**2,476**	**2,867**	**2,833**	**2,858**	***0.9***	***1.4***

Source: BERL Regional Database 2012

- In 2012, there was an increase of two Business Units in the sector, with one Business Unit each for the Machinery and Equipment Manufacturing industry and Consultant Engineering Services industry.

Figure 7.7 shows the change in employment, GDP and business units in the Engineering, Machinery & Equipment Manufacturing sector in the Waitaki District and nationally between 2002 and 2012.

Figure 7.7. Engineering, Machinery & Equipment Manufacturing sector growth, Waitaki District vs. New Zealand, 2002 - 2012



Albeit off a small base, growth in the Engineering, Machinery & Equipment Manufacturing sector has grown much faster than the sector nationally.

7.3.8 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. In general, the changes in the Waitaki District tend to mirror national trends.

Table 7.25 presents the number of house sales in the Waitaki District and New Zealand for the last six years.

Table 7.25. House sales, Waitaki District vs. New Zealand, 2008 to 2012

House sales	Year ending					%pa change	
	Jun-08	Jun-09	Jun-10	Jun-11	Jun-12	*2011 to 2012*	*2008 to 2012*
Waitaki District	466	363	375	339	403	*19.1*	*-3.6*
New Zealand	60,499	52,829	58,288	50,331	58,425	*16.1*	*-0.9*

Source: BERL, Quotable Value

- In the Waitaki District, the number of house sales managed to pick up in 2012. Sales were still below the highest sales of June 2007.[36] This was consistent with national house sales activity, which has a faster rate of house sales.

[36] Note: there were 687 house sales in 2007 in the Waitaki District.

Table 7.26 presents average house prices for the Waitaki District and New Zealand for the five years to June 2012.

Table 7.26. House prices, Waitaki District vs. New Zealand, 2008 to 2012

House prices	Year ending					%pa change	
	Jun-08	Jun-09	Jun-10	Jun-11	Jun-12	2011 to 2012	2008 to 2012
Waitaki District	215,911	215,344	214,785	200,000	219,000	9.5	0.4
New Zealand	404,084	397,195	423,820	402,000	432,000	7.5	1.7

Source: Quotable Value

- House prices also increased in the Waitaki District in the year to June 2012, from an average price of $200,000 in 2011 to $219,000.
- The average house price in Waitaki is almost half the price of an average house in New Zealand.

8 Technical appendices

8.1 Data sources and terminology

This profile uses official statistics of employment and activity units from *Statistics New Zealand's* Business Demographics Statistics (BDS) database, and an associated database developed by *BERL* to provide a measure of Value Added (or GDP) on a district council basis across New Zealand.

These databases organise the statistics according to the Australian and New Zealand Standard Industrial Classification (ANZSIC). However, data relating to agriculture is not released in the BDS publication and therefore, BERL provides estimates of employment and activity units in this industry. These estimates are based on the 1996, 2001, and 2006 censuses as well as additional information during the inter-Census periods.

Full-Time Equivalent (FTE) employment is a measure of the volume of labour used in production. FTE employment is calculated as the number of full-time jobs plus one third the numbers of part-time jobs. That is, in this calculation, three part-time jobs are assumed equivalent to one full-time employee. Note: the estimates of FTE employment in this report include the self-employed with no employees, self-employed employers and employees.

Value Added. This is a measure of the total value of output contributed by the activities of organisations in an industry (including profits and the wages or salaries of employees). It is measured by deducting the purchases of goods and services used in production from the industries' output.[37]

The sum of Value Added for all industries in a council area is the equivalent of the Region council's *Gross Domestic Product (GDP),* and is conceptually comparable to official figures for New Zealand's GDP.

The Value Added measure is drawn from BERL's proprietary *Regional Database*, which is based on the official GDP statistics, trends in labour productivity at the national level and changes in local FTE employment. Real Value Added is measured in constant 2012 price levels, which removes the effect of inflation and focuses on the change in the volume of (real) activity.

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[37] This measure eliminates double counting of outputs of Business Units that are used as inputs by others. For example, the total Value Added incorporated in a loaf of bread is the sum of the sales of wheat farmers, millers, bakeries and supermarkets less their purchases from each other (and other Business Units). For this reason, Value Added is considered a more accurate measure of the economic impact of combined activities than, say, total sales.

8.2 Methodological issues: revisions, method improvements and caveats

The system of official statistics and consequently BERL's Regional Database are transitioning to a new industry classification system, ANZSIC06. Associated methodological changes along with revisions to the time series of data mean that this year's report should not be directly compared with the report, "Economic Profile and Performance 2011: Otago Region (Year Ended March 2011)".

All figures in this year's report use a consistent time series and methodology: this means comparisons of one year's figures with another year's figures cited in this report are valid.

8.2.1 Statistics New Zealand classification changes

The international standards and classifications used to construct official statistics are changed in cycles, with major upgrades happening every 10 to 15 years. As of September 2011, Statistics NZ converted from the 1996 Australian and New Zealand Industry Classification (ANZSIC96) to using the latest industry classification standard, ANZSIC06. The new standard, ANZSIC06:

- creates a new division (division J, information media and telecommunications)
- separates ANZSIC96 division L (property and business services) into three separate divisions (L, M, and N)
- alters the way government output is calculated.

For more detail, see Statistics New Zealand's Commentary for the December 2011 GDP release.

BERL started implementing ANZSCI06 in our regional database in 2011. BERL revised the data series in the BERL Regional Database to conform to the new industry classifications, and all data from previous years up to and including 2012 are consistently classified using this standard.

The 2011 Otago Region profile and the current Overview use the ANZSIC06 classification. The ANZSIC06 system assigns economic activity into 86-industries, which are grouped into eight sectors:

- Primary
- Manufacturing
- Construction
- Wholesale and Distribution
- Retail Trade and Services
- Business services
- Arts and Recreation Services
- Social Services.

This contrasts with regional and district profiles prepared before 2011, which focused on seven sectors classified based on ANZSIC96. Although these earlier profiles covered all sectors, Retail trade and services and arts and recreation services are now treated as separate sectors.

Key sectors (non-standard classifications)

This report also looks at key sectors[38] in the Otago Region economy, which use information from the BERL Database but are sets, subsets or mixtures of ANZSIC06 industries. For example, the Tourism sector is not a distinct sector in its own right and is instead consists of a portion of most other industries. These are broken down into tourism characteristic industries, tourism related industries and non-tourism related industries. BERL calculates tourisms proportion of each of the other industries in the region using ratios identified by Statistics New Zealand in the Tourism Satellite Account and then modified based on several regional indicators of tourism intensity. As such, to avoid double counting, tourism activity cannot be directly added in the analysis.

The analysis shows GDP, employment and business units for the Region as well as for each district, between 2002 and 2012. The key sectors analysed are:

- Tourism[39]
- Primary Production
- Primary Processing
- Creative
- Education & Research
- Engineering, Machinery & Equipment Manufacturing.

For some districts, we have also included additional sectors such as ICT for Dunedin City; Horticulture and Viticulture for Central Otago; and Dairy and Sheep and the Housing Market for Waitaki.

8.2.2 Revisions to the official statistics and data series

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

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

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[38] As recognised in the Otago Forward 10 Year Development Strategy.

[39] The Tourism sector is not a distinct sector in its own right and is instead consists of a portion of most other industries. These are broken down into tourism characteristic industries, tourism related industries and non-tourism related industries. BERL calculates tourisms proportion of each of the other industries in the region using ratios identified by Statistics New Zealand in the Tourism Satellite Account and then modified based on several regional indicators of tourism intensity.

8.2.3 Revisions to the BERL Regional Database

In addition to the official statistic revisions, BERL cross checks its estimates of regional economic activity. Where significant, anomalous changes for a particular activity measure for an area/industry cannot be rationalised or verified, these changes may be adjusted to reflect a longer-term trend. For example, in the report, “Economic Profile and Performance 2011: Otago Region (Year Ended March 2011)”, the Food Processing industry registered a reduction of 1,000 FTEs in three sub-industries, despite no (net) reduction in business units in this industry in the Region. After further investigation with Council staff, this change could not be explained, and therefore the suspect statistics for the three sub-industries were overwritten for 2011 to indicate no change from the previous year.

However, the latest statistics for the Food Processing industry indicate that employment in 2012 has remained at a similar level as the uncorrected 2011 figure. Based on this new information, we have revised the 2011 figure recorded in the BERL database. This revision means that employment for 2011 for the Region reported in here is around 1,000 FTEs lower than in our previous report.

8.2.4 Estimation of employment at a fine level by industry and area

As part of transitioning the BERL Regional Database to ANZSI06, the Database employs an improved methodology to estimate full time/part time/self-employment patterns at a fine industry and area level. However, this change to the estimation method means that the regional employment by industry figures for a given year reported here will not match the equivalent figure in previous reports (for example, 2011). Employment by area and industry for different years reported here can be compared to other figures in *this report*, but should not be directly compared with figures in *previous reports*.

The Household Labour Force Survey (HLFS) does not report employment by area *and* industry at a fine level. BERL combines HLFS data with detailed Business Demography data on employee count by industry to estimate FTE employment by industry and area at a fine level.

A complication is that the detailed Business Demography dataset is based on headcount rather than full time equivalent workers and does not include self-employed workers. We wish to allow for both of these factors in our economic activity indicators.

Detailed industry-level employment information is used to disaggregate the high-level HLFS data (by area and industry at a fine level). These initial estimates are adjusted to allow for full time, part time and self-employed workers. This adjustment ensures that the grand total for employment is consistent with the reported HLFS figure for full time equivalent employment.

For example, we ensure that the industry level estimates in a given sector that has significant levels of self-workers, such as Agriculture, Construction and Retail Trade, match the HLFS total for that sector. Without this adjustment, employment in areas with a high proportion of employment in these industries may be underestimated, while it would be overestimated in areas with a low proportion in such industries.

8.2.5 Treatment of owner-occupied dwellings

The Business Services industry group includes the Property Services industry, which in turn includes the sub-industry Ownership of Owner-Occupied Dwellings. By definition, this sub-industry is included in the GDP figures to reflect the rental value of owner-occupied property, which is an imputed value.

However, this industry does not employ people. This process would bias labour productivity, especially in the property services industry and business services industry group. To avoid such bias, ownership of owner-occupied dwellings is excluded from all calculations of labour productivity.

For overall consistency purposes with official national GDP statistics, we include the imputed value of output for the ownership of owner-occupied dwellings industry in the total GDP figures (and associated statistics such as GDP per capita).

8.2.6 Caveats related to the estimation of regional GDP for the agriculture industry group

BERL estimates regional GDP by industry using employment data at the detailed industry level to split up the reported GDP for the broader industry group to which the detailed industries belong. For example, Statistics New Zealand reports GDP for the agriculture industry group rather than separate figures for the Horticulture and Fruit, Sheep and Beef, Dairy, and Other Livestock Farming industries. This process may overestimate GDP for some detailed industries in a group, and underestimate it for others, when there is rapid GDP growth due to rising productivity in one or a few particular industries in the group.

Statistics New Zealand reports GDP for the agriculture industry group rather than separate figures for the Horticulture and Fruit, Sheep and Beef, Dairy, and Other Livestock Farming industries. An issue for the 2012 regional GDP estimates is that GDP in the agricultural industry group grew by 30.8 percent while employment contracted by 0.6 percent. The growth in GDP is unlikely to be spread across each of the detailed industries in proportion to the change in an industry's employment. Rather, it is likely that much of the group-level increase will be driven by the dairy industry, as a result of the global recovery and rising productivity in that industry due to rising global milk solid prices during 2011/12. This implies that the estimated GDP for the non-dairy industries will be overstated while the estimate for the dairy industry would be understated.

Areas that have disproportionately more activity in the non-dairy agriculture industries and less in the dairy industry will be affected by this estimation issue for the agriculture industry group GDP. The associated employment figures are reported at a finer level, and will therefore provide a more accurate picture of the change in activity at the detailed industry and industry group level in a particular area. The employment figures will not, however, reflect changes in productivity.

8.3 Sector composition

Table 8.1. The eight key sectors of the Otago Region economy

Primary production	Primary processing	Creative	Education and research	Engineering, machinery and equipment manufacturing	Tourism
Agriculture	Food Product Manufacturing	Printing	Preschool Education	Other Transport Equipment Manufacturing n.e.c.	Tourism-characteristic industries
Aquaculture	Beverage and Tobacco Product Manufacturing	Printing Support Services	Primary Education	Agricultural Machinery and Equipment Manufacturing	Tourism-related industries
Fishing, Hunting and Trapping	Wood Product Manufacturing	Newspaper Publishing	Secondary Education	Mining and Construction Machinery Manufacturing	All non-tourism-related industries
Agriculture Forestry and Fishing Support Services	Pulp Paper and Converted Paper Product Manufacturing	Magazine and Other Periodical Publishing	Combined Primary and Secondary Education	Machine Tool and Parts Manufacturing	
Forestry and Logging		Book Publishing	Special School Education	Other Specialised Machinery and Equipment Manufacturing	
Coal Mining		Directory and Mailing List Publishing	Higher Education	Lifting and Material Handling Equipment Manufacturing	
Oil and Gas Extraction		Reproduction of Recorded Media	Technical and Vocational Education and Training	Other Machinery and Equipment Manufacturing n.e.c.	
Metal Ore Mining		Other Publishing (except Software, Music and Internet)	Arts Education	Photographic, Optical and Ophthalmic Equipment Manufacturing	
Non-Metallic Mineral Mining and Quarrying		Software Publishing	Adult, Community and Other Education n.e.c.	Electric Lighting Equipment Manufacturing	
Exploration and Other Mining Support Services		Architectural Services	Educational Support Services	Fixed Space Heating, Cooling and Ventilation Equipment Manufacturing	
		Advertising Services	Scientific Research Services	Medical and Surgical Equipment Manufacturing	
		Other Specialised Design Services	Scientific Testing and Analysis Services	Other Professional and Scientific Equipment Manufacturing	
		Radio Broadcasting	Other Professional, Scientific and Technical Services n.e.c.	Engineering Design and Engineering Consulting Services	
		Cable and Other Subscription Broadcasting			
		Free-to-Air Television Broadcasting			
		Motion Picture and Video Production			
		Motion Picture and Video Distribution			
		Motion Picture Exhibition			
		Post-production Services and Other Motion Picture and Video Activities			
		Music Publishing			
		Music and Other Sound Recording Activities			
		Performing Arts Operation			
		Performing Arts Venue Operation			
		Creative Artists, Musicians, Writers and Performers			
		Professional Photographic Services			
		Photographic Film Processing			

8.4 Key indicators: sector share by territorial authority, 2012

Table 8.2. FTEs by sector and TA, 2012

FTEs by sector and TA (2012)	Central Otago District	Clutha District	Dunedin City	Queenstown-Lakes District	Waitaki District	Otago Region
Primary	31%	41%	3%	3%	24%	12%
Manufacturing	6%	18%	8%	3%	23%	9%
Construction	14%	7%	9%	12%	8%	10%
Wholesale and Distribution	6%	4%	8%	6%	5%	7%
Retail Trade and Services	15%	10%	21%	40%	16%	22%
Business Services	13%	4%	16%	19%	8%	14%
Arts and Recreation Services	1%	0%	3%	7%	1%	3%
Social Services	13%	14%	33%	10%	16%	24%
Total	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

Source: BERL Regional Database, 2012

Table 8.3. GDP by sector and TA, 2012

GDP by sector and TA (2012)	Central Otago District	Clutha District	Dunedin City	Queenstown-Lakes District	Waitaki District	Otago Region
Primary	27%	36%	3%	3%	19%	11%
Manufacturing	8%	24%	10%	5%	29%	13%
Construction	9%	4%	5%	9%	4%	6%
Wholesale and Distribution	9%	5%	11%	10%	7%	10%
Retail Trade and Services	9%	6%	12%	22%	9%	12%
Business Services	14%	5%	19%	24%	10%	17%
Arts and Recreation Services	1%	0%	2%	6%	1%	2%
Social Services	10%	9%	22%	8%	10%	16%
Sub-total (excluding O.O.D.)	88%	89%	84%	86%	87%	85%
*Owner-Occupied Dwellings**	12%	11%	16%	14%	13%	15%
Total	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

* Imputed value, included in Total GDP only

Source: BERL Regional Database, 2012

Table 8.4. Business units by sector and TA, 2012

BUs by sector and TA (2012)	Central Otago District	Clutha District	Dunedin City	Queenstown-Lakes District	Waitaki District	Otago Region
Primary	29%	51%	9%	5%	36%	18%
Manufacturing	4%	2%	4%	3%	3%	3%
Construction	11%	5%	9%	16%	8%	11%
Wholesale and Distribution	6%	3%	7%	5%	5%	6%
Retail Trade and Services	13%	9%	18%	17%	14%	16%
Business Services	30%	23%	39%	46%	26%	36%
Arts and Recreation Services	2%	1%	3%	4%	2%	3%
Social Services	5%	4%	10%	4%	5%	7%
Total	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

Source: BERL Regional Database, 2012

8.5 Detailed tables - Otago Region

Employment (FTEs) for Otago Region	2002	2010	2011	2012	change 2011-2012		Change 2002 to 2012 %pa
					Number	%	
Agriculture	7,450	7,422	7,982	8,228	246	3.1	1.0
Aquaculture	6	0	10	10	0	0.8	4.5
Forestry and Logging	260	221	258	240	-18	-6.9	-0.8
Fishing Hunting and Trapping	42	28	35	40	5	15.1	-0.6
Agriculture Forestry and Fishing Support Services	1,403	1,705	1,731	1,868	137	7.9	2.9
Coal Mining	13	17	13	17	3	25.9	2.6
Oil and Gas Extraction	0	0	0	0	0	na	na
Metal Ore Mining	150	392	537	530	-7	-1.3	13.4
Non-Metallic Mineral Mining and Quarrying	154	152	147	141	-7	-4.5	-0.9
Exploration and Other Mining Support Services	0	109	13	10	-3	-24.4	na
Primary	*9,478*	*10,044*	*10,727*	*11,083*	356	3.3	1.6
Food Product Manufacturing	5,965	5,219	3,933	4,082	149	3.8	-3.7
Beverage and Tobacco Product Manufacturing	225	354	367	405	38	10.4	6.1
Textile Leather Clothing and Footwear Manufacturing	1,244	565	581	534	-47	-8.0	-8.1
Wood Product Manufacturing	1,000	712	717	737	20	2.8	-3.0
Pulp Paper and Converted Paper Product Manufacturing	73	51	49	29	-20	-40.7	-8.7
Printing	527	351	372	352	-20	-5.5	-4.0
Petroleum and Coal Product Manufacturing	3	64	61	65	4	6.2	34.9
Basic Chemical and Chemical Product Manufacturing	142	106	113	117	5	4.2	-1.9
Polymer Product and Rubber Product Manufacturing	167	112	120	101	-19	-15.8	-4.9
Non-Metallic Mineral Product Manufacturing	198	304	220	213	-7	-3.4	0.7
Primary Metal and Metal Product Manufacturing	187	103	110	150	40	36.4	-2.2
Fabricated Metal Product Manufacturing	557	775	835	843	8	1.0	4.2
Transport Equipment Manufacturing	397	406	404	292	-112	-27.7	-3.0
Machinery and Equipment Manufacturing	1,193	695	670	662	-8	-1.2	-5.7
Furniture and Other Manufacturing	196	250	258	242	-16	-6.0	2.1
Manufacturing	*12,074*	*10,068*	*8,810*	*8,825*	15	0.2	-3.1
Building Construction	1,429	2,665	2,264	2,155	-109	-4.8	4.2
Heavy and Civil Engineering Construction	1,723	2,335	2,396	2,395	-1	0.0	3.3
Construction Services	2,933	5,034	4,749	4,588	-160	-3.4	4.6
Construction	*6,085*	*10,035*	*9,408*	*9,138*	-270	-2.9	4.2
Basic Material Wholesaling	723	842	752	766	14	1.9	0.6
Machinery and Equipment Wholesaling	576	740	745	844	99	13.3	3.9
Motor Vehicle and Motor Vehicle Parts Wholesaling	134	172	168	173	5	3.1	2.6
Grocery Liquor and Tobacco Product Wholesaling	806	840	935	971	37	3.9	1.9
Other Goods Wholesaling	332	355	367	346	-22	-5.9	0.4
Commission-Based Wholesaling	75	48	43	50	7	16.3	-3.9
Road Transport	1,530	1,731	1,689	1,760	72	4.3	1.4
Rail Transport	70	51	53	62	9	17.5	-1.2
Water Transport	27	8	10	23	13	126.7	-1.5
Air and Space Transport	192	179	160	172	11	7.0	-1.1
Other Transport	241	228	236	254	18	7.6	0.5
Postal and Courier Pick-up and Delivery Services	595	506	480	457	-22	-4.7	-2.6
Transport Support Services	394	585	629	633	4	0.6	4.9
Warehousing and Storage Services	247	68	86	76	-11	-12.2	-11.1
Wholesale and Distribution	*5,941*	*6,353*	*6,354*	*6,589*	235	3.7	1.0
Motor Vehicle and Motor Vehicle Parts Retailing	791	761	742	759	17	2.3	-0.4
Fuel Retailing	668	417	477	444	-33	-7.0	-4.0
Food Retailing	3,194	3,050	3,176	3,047	-128	-4.0	-0.5
Other Store-Based Retailing	5,078	4,685	4,787	4,805	18	0.4	-0.6
Non-Store Retailing and Retail Commission Based Buying and/or Selling	63	29	33	39	6	16.9	-4.8
Accommodation	2,939	3,346	3,682	3,943	261	7.1	3.0
Food and Beverage Services	3,736	4,684	4,781	4,943	162	3.4	2.8
Repair and Maintenance	1,057	1,277	1,218	1,252	34	2.8	1.7
Personal and Other Services	1,268	1,409	1,381	1,445	65	4.7	1.3
Private Households Employing Staff	0	0	0	0	0	na	na
Retail Trade and Services	*18,794*	*19,656*	*20,277*	*20,678*	401	2.0	1.0
Electricity Supply	141	282	282	313	31	10.9	8.3
Gas Supply	3	28	22	31	9	41.1	25.4
Water Supply Sewerage and Drainage Services	120	105	114	109	-5	-4.1	-0.9
Waste Collection Treatment and Disposal Services	99	142	157	196	39	24.9	7.1
Publishing (except Internet and Music Publishing)	786	795	821	761	-60	-7.3	-0.3
Motion Picture and Sound Recording Activities	191	188	182	180	-2	-1.2	-0.6
Broadcasting (except Internet)	182	143	143	143	0	0.0	-2.4
Internet Publishing and Broadcasting	0	0	3	0	-3	-100.0	na
Telecommunications Services	55	74	83	74	-9	-10.7	2.9
Internet Service Providers Web Search Portals and Data Processing Services	57	45	30	18	-12	-39.5	-10.9
Library and Other Information Services	79	196	195	189	-6	-3.1	9.1
Finance	1,067	962	911	941	30	3.3	-1.2
Insurance and Superannuation Funds	121	120	107	119	12	11.2	-0.2
Auxiliary Finance and Insurance Services	368	470	490	500	10	2.0	3.1
Rental and Hiring Services (except Real Estate)	344	516	529	628	99	18.8	6.2
Property Operators and Real Estate Services	633	825	770	757	-14	-1.8	1.8
Professional Scientific and Technical Services (exc Comp Sys Dsn & related)	2,699	4,146	4,185	4,325	141	3.4	4.8
Computer System Design and Related Services	139	232	266	247	-19	-7.0	6.0
Administrative Services	2,191	2,847	2,871	2,795	-76	-2.7	2.5
Building Cleaning Pest Control and Other Support Services	1,268	1,215	1,224	1,153	-71	-5.8	-0.9
Business Services	*10,544*	*13,329*	*13,386*	*13,479*	94	0.7	2.5
Heritage Activities	347	515	585	584	-1	-0.2	5.4
Artistic Activities	80	108	87	85	-2	-2.8	0.5
Sport and Recreation Activities	1,042	1,650	1,542	1,585	43	2.8	4.3
Gambling Activities	308	204	214	296	81	38.0	-0.4
Arts and Recreation Services	*1,777*	*2,477*	*2,429*	*2,550*	121	5.0	3.7
Public Administration	1,565	2,004	2,044	2,010	-34	-1.7	2.5
Defence	249	23	29	22	-6	-22.5	-21.4
Public Order Safety and Regulatory Services	1,237	1,501	2,037	2,002	-36	-1.7	4.9
Preschool and School Education	3,463	3,794	4,005	3,893	-112	-2.8	1.2
Tertiary Education	1,503	4,760	4,517	4,282	-235	-5.2	11.0
Adult Community and Other Education	150	365	377	349	-29	-7.6	8.8
Hospitals	2,987	3,398	3,418	3,598	179	5.2	1.9
Medical and Other Health Care Services	752	2,292	2,235	2,183	-51	-2.3	11.3
Residential Care Services	1,577	1,949	1,920	2,104	184	9.6	2.9
Social Assistance Services	740	1,676	1,970	1,821	-149	-7.5	9.4
Social Services	*14,223*	*21,763*	*22,552*	*22,263*	-288	-1.3	4.6
TOTAL ALL INDUSTRIES	**78,916**	**93,726**	**93,942**	**94,606**	**664**	**0.7**	**1.8**
Tourism sector	*6,983*	*8,954*	*9,419*	*10,134*	*715*	*7.6*	*3.8*

Real value added (GDP 2012$m) for Otago Region	2002	2010	2011	2012	change 2011-2012		Change 2002 to 2012 %pa
					Number	%	
Agriculture	441	482	455	618	162	35.7	3.4
Aquaculture	4	0	6	7	0	7.4	6.2
Forestry and Logging	86	108	126	120	-6	-5.1	3.4
Fishing Hunting and Trapping	24	18	22	26	5	22.7	1.1
Agriculture Forestry and Fishing Support Services	83	111	99	140	41	42.0	5.4
Coal Mining	3	2	1	1	0	-1.3	-8.4
Oil and Gas Extraction	0	0	0	0	0	na	na
Metal Ore Mining	32	36	47	36	-11	-22.7	1.3
Non-Metallic Mineral Mining and Quarrying	32	14	13	10	-3	-25.2	-11.5
Exploration and Other Mining Support Services	0	10	1	1	0	-40.8	na
Primary	*704*	*779*	*770*	*958*	189	24.5	3.1
Food Product Manufacturing	634	692	518	546	28	5.4	-1.5
Beverage and Tobacco Product Manufacturing	24	47	48	54	6	12.1	8.5
Textile Leather Clothing and Footw ear Manufacturing	75	56	52	46	-6	-12.1	-4.8
Wood Product Manufacturing	127	120	121	129	8	6.7	0.2
Pulp Paper and Converted Paper Product Manufacturing	9	9	8	5	-3	-38.5	-5.7
Printing	19	16	15	17	1	9.0	-1.4
Petroleum and Coal Product Manufacturing	1	17	16	17	0	2.3	35.3
Basic Chemical and Chemical Product Manufacturing	35	27	30	30	0	0.4	-1.6
Polymer Product and Rubber Product Manufacturing	41	29	32	26	-6	-18.9	-4.6
Non-Metallic Mineral Product Manufacturing	31	48	36	35	-2	-4.5	1.0
Primary Metal and Metal Product Manufacturing	23	11	12	16	5	38.6	-3.6
Fabricated Metal Product Manufacturing	69	80	89	91	2	2.7	2.8
Transport Equipment Manufacturing	34	36	40	30	-10	-24.3	-1.0
Machinery and Equipment Manufacturing	101	61	66	69	2	3.4	-3.8
Furniture and Other Manufacturing	12	18	17	16	-1	-5.9	3.0
Manufacturing	*1,235*	*1,265*	*1,101*	*1,126*	25	2.3	-0.9
Building Construction	97	163	146	128	-18	-12.1	2.9
Heavy and Civil Engineering Construction	117	142	154	142	-12	-7.7	2.0
Construction Services	199	307	306	273	-33	-10.8	3.2
Construction	*412*	*612*	*606*	*544*	-63	-10.3	2.8
Basic Material Wholesaling	85	94	88	91	3	3.1	0.7
Machinery and Equipment Wholesaling	67	83	87	100	13	14.7	4.0
Motor Vehicle and Motor Vehicle Parts Wholesaling	16	19	20	20	1	4.4	2.7
Grocery Liquor and Tobacco Product Wholesaling	94	94	109	115	6	5.2	2.0
Other Goods Wholesaling	39	40	43	41	-2	-4.7	0.5
Commission-Based Wholesaling	9	5	5	6	1	17.7	-3.8
Road Transport	187	246	247	253	5	2.1	3.1
Rail Transport	9	7	8	9	1	15.1	0.4
Water Transport	3	1	2	3	2	122.1	0.1
Air and Space Transport	23	25	24	25	1	4.9	0.5
Other Transport	29	32	35	36	2	5.4	2.2
Postal and Courier Pick-up and Delivery Services	73	72	70	66	-5	-6.6	-1.0
Transport Support Services	48	83	92	91	-1	-1.5	6.6
Warehousing and Storage Services	30	10	13	11	-2	-14.0	-9.7
Wholesale and Distribution	*713*	*811*	*842*	*866*	25	2.9	2.0
Motor Vehicle and Motor Vehicle Parts Retailing	36	51	50	54	5	9.5	4.2
Fuel Retailing	30	28	32	32	0	-0.4	0.5
Food Retailing	145	205	212	218	6	2.7	4.2
Other Store-Based Retailing	230	316	320	344	24	7.4	4.1
Non-Store Retailing and Retail Commission Based Buying and/or Selling	3	2	2	3	1	25.1	-0.3
Accommodation	95	107	121	130	9	7.7	3.2
Food and Beverage Services	121	150	157	163	6	4.0	3.0
Repair and Maintenance	62	62	59	60	1	2.2	-0.2
Personal and Other Services	74	69	67	69	3	4.1	-0.6
Private Households Employing Staff	0	0	0	0	0	na	na
Retail Trade and Services	*795*	*992*	*1,019*	*1,073*	54	5.3	3.0
Electricity Supply	58	112	105	111	6	5.8	6.7
Gas Supply	1	11	8	11	3	34.6	23.5
Water Supply Sew erage and Drainage Services	50	41	42	39	-4	-8.5	-2.4
Waste Collection Treatment and Disposal Services	41	56	58	70	11	19.2	5.5
Publishing (except Internet and Music Publishing)	29	36	34	36	2	6.9	2.4
Motion Picture and Sound Recording Activities	15	13	13	13	0	-3.4	-1.6
Broadcasting (except Internet)	14	10	10	10	0	-2.2	-3.4
Internet Publishing and Broadcasting	0	0	0	0	0	-100.0	na
Telecommunications Services	46	80	90	74	-16	-18.0	4.8
Internet Service Providers Web Search Portals and Data Processing Services	48	48	32	18	-14	-44.5	-9.3
Library and Other Information Services	5	10	9	9	0	-3.7	7.0
Finance	141	160	149	152	4	2.5	0.7
Insurance and Superannuation Funds	16	20	17	19	2	10.3	1.8
Auxiliary Finance and Insurance Services	49	78	80	81	1	1.1	5.2
Rental and Hiring Services (except Real Estate)	81	133	135	160	25	18.8	7.1
Property Operators and Real Estate Services	64	92	84	83	-1	-1.6	2.7
Professional Scientific and Technical Services (exc Comp Sys Dsn & related)	277	382	383	402	19	4.9	3.8
Computer System Design and Related Services	14	21	24	23	-1	-5.6	4.9
Administrative Services	95	135	130	128	-1	-1.1	3.1
Building Cleaning Pest Control and Other Support Services	55	58	55	53	-2	-4.3	-0.3
Business Services	*1,097*	*1,496*	*1,461*	*1,491*	31	2.1	3.1
Heritage Activities	27	35	42	41	-1	-2.4	4.3
Artistic Activities	6	7	6	6	0	-5.0	-0.5
Sport and Recreation Activities	81	113	111	112	1	0.5	3.2
Gambling Activities	18	10	10	14	4	37.2	-2.3
Arts and Recreation Services	*132*	*165*	*170*	*173*	3	1.8	2.7
Public Administration	121	187	194	186	-8	-4.0	4.4
Defence	15	2	2	2	-1	-23.7	-19.9
Public Order Safety and Regulatory Services	74	109	150	145	-5	-3.3	6.9
Preschool and School Education	231	187	195	192	-3	-1.7	-1.8
Tertiary Education	100	234	220	211	-9	-4.1	7.7
Adult Community and Other Education	10	18	18	17	-1	-6.6	5.5
Hospitals	282	268	272	276	4	1.4	-0.2
Medical and Other Health Care Services	71	181	178	168	-10	-5.9	9.0
Residential Care Services	149	154	153	161	9	5.6	0.8
Social Assistance Services	43	82	95	87	-8	-8.1	7.3
Social Services	*1,096*	*1,420*	*1,479*	*1,446*	-33	-2.2	2.8
Subtotal	*6,184*	*7,539*	*7,447*	*7,678*	231	3.1	2.2
Owner-Occupied Dwellings and Property Operators	*1,043*	*1,279*	*1,285*	*1,302*	17	1.3	2.2
TOTAL ALL INDUSTRIES	**7,227**	**8,819**	**8,732**	**8,980**	**248**	**2.8**	**2.2**
Tourism sector	*348*	*511*	*540*	*577*	*37*	*6.9*	*5.2*

Activity units for Otago Region	2002	2010	2011	2012	change 2011-2012		Change 2002 to 2012 %pa
					Number	%	
Agriculture	4,376	3,951	3,847	3,867	20	0.5	-1.2
Aquaculture	6	5	6	8	2	33.3	2.9
Forestry and Logging	387	367	372	361	-11	-3.0	-0.7
Fishing Hunting and Trapping	124	89	90	87	-3	-3.3	-3.5
Agriculture Forestry and Fishing Support Services	356	444	409	436	27	6.6	2.0
Coal Mining	1	2	1	1	0	0.0	0.0
Oil and Gas Extraction	0	0	0	1	1	na	na
Metal Ore Mining	11	8	8	8	0	0.0	-3.1
Non-Metallic Mineral Mining and Quarrying	22	29	28	28	0	0.0	2.4
Exploration and Other Mining Support Services	2	5	8	11	3	37.5	18.6
Primary	*5,285*	*4,900*	*4,769*	*4,808*	39	0.8	-0.9
Food Product Manufacturing	123	118	119	125	6	5.0	0.2
Beverage and Tobacco Product Manufacturing	28	56	58	57	-1	-1.7	7.4
Textile Leather Clothing and Footwear Manufacturing	89	70	69	61	-8	-11.6	-3.7
Wood Product Manufacturing	111	113	109	107	-2	-1.8	-0.4
Pulp Paper and Converted Paper Product Manufacturing	5	3	3	4	1	33.3	-2.2
Printing	42	43	44	43	-1	-2.3	0.2
Petroleum and Coal Product Manufacturing	3	3	3	3	0	0.0	0.0
Basic Chemical and Chemical Product Manufacturing	20	16	19	21	2	10.5	0.5
Polymer Product and Rubber Product Manufacturing	14	18	21	20	-1	-4.8	3.6
Non-Metallic Mineral Product Manufacturing	46	56	51	49	-2	-3.9	0.6
Primary Metal and Metal Product Manufacturing	9	14	13	12	-1	-7.7	2.9
Fabricated Metal Product Manufacturing	107	124	128	130	2	1.6	2.0
Transport Equipment Manufacturing	55	72	72	69	-3	-4.2	2.3
Machinery and Equipment Manufacturing	133	138	132	135	3	2.3	0.1
Furniture and Other Manufacturing	74	79	80	72	-8	-10.0	-0.3
Manufacturing	*859*	*923*	*921*	*908*	-13	-1.4	0.6
Building Construction	542	1,103	1,050	1,025	-25	-2.4	6.6
Heavy and Civil Engineering Construction	95	101	98	100	2	2.0	0.5
Construction Services	1,105	1,725	1,695	1,647	-48	-2.8	4.1
Construction	*1,742*	*2,929*	*2,843*	*2,772*	-71	-2.5	4.8
Basic Material Wholesaling	165	193	197	193	-4	-2.0	1.6
Machinery and Equipment Wholesaling	148	172	168	170	2	1.2	1.4
Motor Vehicle and Motor Vehicle Parts Wholesaling	55	63	63	65	2	3.2	1.7
Grocery Liquor and Tobacco Product Wholesaling	113	104	99	107	8	8.1	-0.5
Other Goods Wholesaling	153	153	138	142	4	2.9	-0.7
Commission-Based Wholesaling	47	27	27	28	1	3.7	-5.0
Road Transport	400	447	434	418	-16	-3.7	0.4
Rail Transport	6	4	3	3	0	0.0	-6.7
Water Transport	5	9	8	7	-1	-12.5	3.4
Air and Space Transport	36	44	35	36	1	2.9	0.0
Other Transport	49	59	64	70	6	9.4	3.6
Postal and Courier Pick-up and Delivery Services	169	182	187	183	-4	-2.1	0.8
Transport Support Services	43	52	53	52	-1	-1.9	1.9
Warehousing and Storage Services	26	25	21	18	-3	-14.3	-3.6
Wholesale and Distribution	*1,415*	*1,534*	*1,497*	*1,492*	-5	-0.3	0.5
Motor Vehicle and Motor Vehicle Parts Retailing	123	138	143	147	4	2.8	1.8
Fuel Retailing	85	68	67	64	-3	-4.5	-2.8
Food Retailing	271	270	275	281	6	2.2	0.4
Other Store-Based Retailing	951	1,122	1,124	1,133	9	0.8	1.8
Non-Store Retailing and Retail Commission Based Buying and/or Selling	62	65	65	65	0	0.0	0.5
Accommodation	461	587	574	575	1	0.2	2.2
Food and Beverage Services	678	846	850	859	9	1.1	2.4
Repair and Maintenance	406	431	440	438	-2	-0.5	0.8
Personal and Other Services	525	599	602	603	1	0.2	1.4
Private Households Employing Staff	0	0	0	0	0	na	na
Retail Trade and Services	*3,562*	*4,126*	*4,140*	*4,165*	25	0.6	1.6
Electricity Supply	13	19	17	20	3	17.6	4.4
Gas Supply	1	2	2	3	1	50.0	11.6
Water Supply Sewerage and Drainage Services	12	17	20	19	-1	-5.0	4.7
Waste Collection Treatment and Disposal Services	33	40	39	41	2	5.1	2.2
Publishing (except Internet and Music Publishing)	28	45	45	48	3	6.7	5.5
Motion Picture and Sound Recording Activities	77	114	121	113	-8	-6.6	3.9
Broadcasting (except Internet)	25	18	18	19	1	5.6	-2.7
Internet Publishing and Broadcasting	0	1	3	2	-1	-33.3	na
Telecommunications Services	12	11	12	11	-1	-8.3	-0.9
Internet Service Providers Web Search Portals and Data Processing Services	9	20	20	19	-1	-5.0	7.8
Library and Other Information Services	22	23	21	23	2	9.5	0.4
Finance	292	1,177	1,188	1,250	62	5.2	15.7
Insurance and Superannuation Funds	63	40	40	42	2	5.0	-4.0
Auxiliary Finance and Insurance Services	153	230	221	226	5	2.3	4.0
Rental and Hiring Services (except Real Estate)	273	283	301	308	7	2.3	1.2
Property Operators and Real Estate Services	2,676	4,858	4,858	4,888	30	0.6	6.2
Professional Scientific and Technical Services (exc Comp Sys Dsn & related)	1,009	1,532	1,533	1,579	46	3.0	4.6
Computer System Design and Related Services	90	168	181	194	13	7.2	8.0
Administrative Services	263	427	410	408	-2	-0.5	4.5
Building Cleaning Pest Control and Other Support Services	175	290	292	292	0	0.0	5.3
Business Services	*5,226*	*9,315*	*9,342*	*9,505*	163	1.7	6.2
Heritage Activities	40	48	53	53	0	0.0	2.9
Artistic Activities	92	131	126	120	-6	-4.8	2.7
Sport and Recreation Activities	392	476	474	480	6	1.3	2.0
Gambling Activities	13	10	10	12	2	20.0	-0.8
Arts and Recreation Services	*537*	*665*	*663*	*665*	2	0.3	2.2
Public Administration	108	82	81	82	1	1.2	-2.7
Defence	4	3	3	2	-1	-33.3	-6.7
Public Order Safety and Regulatory Services	144	163	163	158	-5	-3.1	0.9
Preschool and School Education	293	299	295	296	1	0.3	0.1
Tertiary Education	24	39	38	47	9	23.7	7.0
Adult Community and Other Education	109	164	159	157	-2	-1.3	3.7
Hospitals	15	14	14	14	0	0.0	-0.7
Medical and Other Health Care Services	590	791	802	820	18	2.2	3.3
Residential Care Services	88	83	84	84	0	0.0	-0.5
Social Assistance Services	100	139	138	139	1	0.7	3.3
Social Services	*1,475*	*1,777*	*1,777*	*1,799*	22	1.2	2.0
TOTAL ALL INDUSTRIES	**20,101**	**26,169**	**25,952**	**26,114**	**162**	**0.6**	**2.7**
Tourism sector	1,276	1,798	1,816	1,897	81	4.4	4.0

8.6 Detailed tables - Central Otago District

Employment (FTEs) for Central Otago	2002	2010	2011	2012	change 2011-2012 Number	change 2011-2012 %	Change 2002 to 2012 %pa
Agriculture	2,100	2,058	2,152	2,334	182	8.5	1.1
Aquaculture	0	0	0	0	0	na	na
Forestry and Logging	12	12	15	18	3	20.9	3.9
Fishing Hunting and Trapping	3	5	2	10	7	303.0	14.2
Agriculture Forestry and Fishing Support Services	371	737	773	768	-4	-0.5	7.6
Coal Mining	0	0	0	0	0	na	na
Oil and Gas Extraction	0	0	0	0	0	na	na
Metal Ore Mining	0	7	17	17	0	0.8	na
Non-Metallic Mineral Mining and Quarrying	0	13	13	7	-7	-49.6	na
Exploration and Other Mining Support Services	0	3	7	10	3	51.1	na
Primary	*2,486*	*2,835*	*2,978*	*3,164*	186	6.2	2.4
Food Product Manufacturing	241	84	73	70	-3	-3.5	-11.6
Beverage and Tobacco Product Manufacturing	70	194	211	222	12	5.6	12.3
Textile Leather Clothing and Footwear Manufacturing	9	9	6	6	0	0.8	-3.6
Wood Product Manufacturing	75	76	82	92	10	12.4	2.1
Pulp Paper and Converted Paper Product Manufacturing	0	0	0	0	0	na	na
Printing	14	19	25	25	0	0.8	6.1
Petroleum and Coal Product Manufacturing	0	3	0	3	3	na	na
Basic Chemical and Chemical Product Manufacturing	3	0	0	0	0	na	-100.0
Polymer Product and Rubber Product Manufacturing	0	6	3	0	-3	-100.0	na
Non-Metallic Mineral Product Manufacturing	37	50	47	44	-3	-5.7	1.8
Primary Metal and Metal Product Manufacturing	0	0	0	0	0	na	na
Fabricated Metal Product Manufacturing	25	81	79	84	5	6.1	12.9
Transport Equipment Manufacturing	6	0	3	6	3	101.5	0.4
Machinery and Equipment Manufacturing	38	33	30	24	-6	-19.4	-4.3
Furniture and Other Manufacturing	3	6	3	3	0	0.8	0.2
Manufacturing	*520*	*560*	*561*	*581*	20	3.5	1.1
Building Construction	178	365	285	261	-24	-8.4	3.9
Heavy and Civil Engineering Construction	461	691	710	727	17	2.4	4.7
Construction Services	250	505	460	454	-6	-1.2	6.1
Construction	*890*	*1,561*	*1,454*	*1,442*	-12	-0.8	4.9
Basic Material Wholesaling	46	88	94	103	9	9.7	8.4
Machinery and Equipment Wholesaling	15	69	76	80	4	4.9	17.9
Motor Vehicle and Motor Vehicle Parts Wholesaling	6	10	12	12	0	0.8	6.3
Grocery Liquor and Tobacco Product Wholesaling	87	106	128	97	-31	-24.0	1.1
Other Goods Wholesaling	0	3	6	6	0	0.8	na
Commission-Based Wholesaling	16	7	7	10	3	51.1	-4.7
Road Transport	203	282	283	286	2	0.8	3.5
Rail Transport	0	0	0	0	0	na	na
Water Transport	0	0	0	0	0	na	na
Air and Space Transport	0	0	0	0	0	na	na
Other Transport	0	4	4	4	0	0.8	na
Postal and Courier Pick-up and Delivery Services	39	38	40	45	5	11.9	1.4
Transport Support Services	0	6	6	9	3	51.1	na
Warehousing and Storage Services	19	0	0	0	0	na	-100.0
Wholesale and Distribution	*432*	*613*	*656*	*652*	-4	-0.7	4.2
Motor Vehicle and Motor Vehicle Parts Retailing	106	75	77	68	-9	-11.5	-4.3
Fuel Retailing	86	61	69	72	3	4.3	-1.7
Food Retailing	272	334	331	316	-15	-4.6	1.5
Other Store-Based Retailing	268	308	320	314	-6	-2.0	1.6
Non-Store Retailing and Retail Commission Based Buying and/or Selling	6	0	0	0	0	na	-100.0
Accommodation	127	157	152	169	17	11.4	2.9
Food and Beverage Services	201	335	358	364	7	1.8	6.1
Repair and Maintenance	82	119	119	122	3	2.5	4.0
Personal and Other Services	43	70	76	87	10	13.3	7.3
Private Households Employing Staff	0	0	0	0	0	na	na
Retail Trade and Services	*1,190*	*1,459*	*1,503*	*1,512*	10	0.6	2.4
Electricity Supply	46	70	76	71	-5	-6.0	4.6
Gas Supply	0	0	0	0	0	na	na
Water Supply Sewerage and Drainage Services	0	0	3	3	0	0.8	na
Waste Collection Treatment and Disposal Services	8	39	40	41	0	0.8	17.4
Publishing (except Internet and Music Publishing)	8	17	21	17	-4	-19.4	7.6
Motion Picture and Sound Recording Activities	0	0	0	0	0	na	na
Broadcasting (except Internet)	22	7	7	0	-7	-100.0	-100.0
Internet Publishing and Broadcasting	0	0	0	0	0	na	na
Telecommunications Services	3	0	0	3	3	na	1.0
Internet Service Providers Web Search Portals and Data Processing Services	3	0	0	0	0	na	-100.0
Library and Other Information Services	5	16	15	19	4	25.9	13.4
Finance	45	71	64	84	20	31.1	6.4
Insurance and Superannuation Funds	6	6	6	6	0	0.8	0.3
Auxiliary Finance and Insurance Services	14	33	32	33	1	4.0	8.7
Rental and Hiring Services (except Real Estate)	13	18	22	14	-8	-37.0	0.4
Property Operators and Real Estate Services	52	108	58	69	11	19.4	2.9
Professional Scientific and Technical Services (exc Comp Sys Dsn & related)	255	325	304	261	-43	-14.3	0.2
Computer System Design and Related Services	10	6	6	6	0	0.8	-4.5
Administrative Services	106	575	624	590	-34	-5.5	18.7
Building Cleaning Pest Control and Other Support Services	276	165	171	108	-63	-36.7	-8.9
Business Services	*872*	*1,457*	*1,450*	*1,326*	-124	-8.5	4.3
Heritage Activities	22	25	24	23	-2	-7.0	0.5
Artistic Activities	0	0	0	0	0	na	na
Sport and Recreation Activities	41	82	73	70	-4	-4.9	5.4
Gambling Activities	0	0	0	0	0	na	na
Arts and Recreation Services	*62*	*107*	*97*	*92*	-5	-5.4	4.0
Public Administration	105	143	137	153	17	12.1	3.8
Defence	0	0	0	0	0	na	na
Public Order Safety and Regulatory Services	49	43	50	54	4	7.0	1.0
Preschool and School Education	277	386	390	397	7	1.9	3.7
Tertiary Education	9	32	28	36	8	27.6	14.2
Adult Community and Other Education	7	44	19	28	9	45.1	14.4
Hospitals	136	151	153	163	11	7.0	1.9
Medical and Other Health Care Services	91	276	264	256	-8	-3.1	10.9
Residential Care Services	64	137	135	132	-3	-2.4	7.5
Social Assistance Services	9	52	91	116	25	27.0	29.1
Social Services	*747*	*1,264*	*1,267*	*1,334*	68	5.3	6.0
TOTAL ALL INDUSTRIES	**7,200**	**9,856**	**9,966**	**10,103**	**137**	**1.4**	**3.4**
Tourism sector	*377*	*630*	*638*	*516*	*-121*	*-19.0*	*3.2*

Real value added (GDP 2012$m) for Central Otago	2002	2010	2011	2012	change 2011-2012		Change 2002 to 2012 %pa
					Number	%	
Agriculture	124	134	123	175	53	42.8	3.5
Aquaculture	0	0	0	0	0	na	na
Forestry and Logging	4	6	7	9	2	23.3	8.3
Fishing Hunting and Trapping	1	3	2	7	5	329.6	16.1
Agriculture Forestry and Fishing Support Services	22	48	44	58	14	30.9	10.1
Coal Mining	0	0	0	0	0	na	na
Oil and Gas Extraction	0	0	0	0	0	na	na
Metal Ore Mining	0	1	1	1	0	-21.0	na
Non-Metallic Mineral Mining and Quarrying	0	1	1	0	-1	-60.5	na
Exploration and Other Mining Support Services	0	0	1	1	0	18.4	na
Primary	*152*	*192*	*179*	*251*	72	40.3	5.1
Food Product Manufacturing	26	11	10	9	0	-2.0	-9.6
Beverage and Tobacco Product Manufacturing	7	26	28	30	2	7.2	14.9
Textile Leather Clothing and Footwear Manufacturing	1	1	1	1	0	-3.7	-0.1
Wood Product Manufacturing	9	13	14	16	2	16.7	5.4
Pulp Paper and Converted Paper Product Manufacturing	0	0	0	0	0	na	na
Printing	1	1	1	1	0	16.2	9.0
Petroleum and Coal Product Manufacturing	0	1	0	1	1	na	na
Basic Chemical and Chemical Product Manufacturing	1	0	0	0	0	na	-100.0
Polymer Product and Rubber Product Manufacturing	0	1	1	0	-1	-100.0	na
Non-Metallic Mineral Product Manufacturing	6	8	8	7	-1	-6.8	2.1
Primary Metal and Metal Product Manufacturing	0	0	0	0	0	na	na
Fabricated Metal Product Manufacturing	3	8	8	9	1	7.9	11.4
Transport Equipment Manufacturing	1	0	0	1	0	111.0	2.4
Machinery and Equipment Manufacturing	3	3	3	3	0	-15.6	-2.4
Furniture and Other Manufacturing	0	0	0	0	0	0.9	1.1
Manufacturing	*57*	*73*	*73*	*77*	4	6.0	3.1
Building Construction	12	22	18	16	-3	-15.4	2.5
Heavy and Civil Engineering Construction	31	42	46	43	-2	-5.4	3.3
Construction Services	17	31	30	27	-3	-8.8	4.8
Construction	*60*	*95*	*94*	*86*	-8	-8.5	3.6
Basic Material Wholesaling	5	10	11	12	1	11.1	8.6
Machinery and Equipment Wholesaling	2	8	9	9	1	6.2	18.0
Motor Vehicle and Motor Vehicle Parts Wholesaling	1	1	1	1	0	2.0	6.4
Grocery Liquor and Tobacco Product Wholesaling	10	12	15	12	-3	-23.1	1.2
Other Goods Wholesaling	0	0	1	1	0	2.0	na
Commission-Based Wholesaling	2	1	1	1	0	53.0	-4.6
Road Transport	25	40	42	41	-1	-1.3	5.2
Rail Transport	0	0	0	0	0	na	na
Water Transport	0	0	0	0	0	na	na
Air and Space Transport	0	0	0	0	0	na	na
Other Transport	0	1	1	1	0	-1.3	na
Postal and Courier Pick-up and Delivery Services	5	5	6	6	1	9.7	3.1
Transport Support Services	0	1	1	1	0	48.0	na
Warehousing and Storage Services	2	0	0	0	0	na	-100.0
Wholesale and Distribution	*52*	*78*	*87*	*86*	-1	-0.9	5.1
Motor Vehicle and Motor Vehicle Parts Retailing	5	5	5	5	0	-5.3	0.2
Fuel Retailing	4	4	5	5	1	11.6	2.9
Food Retailing	12	22	22	23	0	2.1	6.3
Other Store-Based Retailing	12	21	21	22	1	4.9	6.4
Non-Store Retailing and Retail Commission Based Buying and/or Selling	0	0	0	0	0	na	-100.0
Accommodation	4	5	5	6	1	12.0	3.1
Food and Beverage Services	6	11	12	12	0	2.4	6.3
Repair and Maintenance	5	6	6	6	0	1.9	2.0
Personal and Other Services	2	3	4	4	0	12.7	5.2
Private Households Employing Staff	0	0	0	0	0	na	na
Retail Trade and Services	*51*	*77*	*79*	*83*	3	4.1	4.9
Electricity Supply	19	27	28	25	-3	-10.3	3.0
Gas Supply	0	0	0	0	0	na	na
Water Supply Sewerage and Drainage Services	0	0	1	1	0	-3.9	na
Waste Collection Treatment and Disposal Services	3	16	15	14	-1	-3.9	15.6
Publishing (except Internet and Music Publishing)	0	1	1	1	0	-7.0	10.5
Motion Picture and Sound Recording Activities	0	0	0	0	0	na	na
Broadcasting (except Internet)	2	0	0	0	0	-100.0	-100.0
Internet Publishing and Broadcasting	0	0	0	0	0	na	na
Telecommunications Services	2	0	0	3	3	na	2.8
Internet Service Providers Web Search Portals and Data Processing Services	3	0	0	0	0	na	-100.0
Library and Other Information Services	0	1	1	1	0	25.2	11.2
Finance	6	12	10	14	3	30.0	8.6
Insurance and Superannuation Funds	1	1	1	1	0	-0.1	2.3
Auxiliary Finance and Insurance Services	2	6	5	5	0	3.1	10.9
Rental and Hiring Services (except Real Estate)	3	5	6	4	-2	-37.0	1.2
Property Operators and Real Estate Services	5	12	6	8	1	19.6	3.8
Professional Scientific and Technical Services (exc Comp Sys Dsn & related)	26	30	28	24	-4	-13.0	-0.7
Computer System Design and Related Services	1	1	1	1	0	2.2	-5.4
Administrative Services	5	27	28	27	-1	-3.9	19.5
Building Cleaning Pest Control and Other Support Services	12	8	8	5	-3	-35.6	-8.4
Business Services	*90*	*146*	*139*	*134*	-6	-4.1	4.0
Heritage Activities	2	2	2	2	0	-9.1	-0.5
Artistic Activities	0	0	0	0	0	na	na
Sport and Recreation Activities	3	6	5	5	0	-7.0	4.4
Gambling Activities	0	0	0	0	0	na	na
Arts and Recreation Services	*5*	*7*	*7*	*6*	-1	-7.5	2.9
Public Administration	8	13	13	14	1	9.4	5.8
Defence	0	0	0	0	0	na	na
Public Order Safety and Regulatory Services	3	3	4	4	0	5.3	3.0
Preschool and School Education	18	19	19	20	1	3.0	0.6
Tertiary Education	1	2	1	2	0	29.1	10.9
Adult Community and Other Education	0	2	1	1	0	46.7	11.0
Hospitals	13	12	12	13	0	3.2	-0.2
Medical and Other Health Care Services	9	22	21	20	-1	-6.6	8.6
Residential Care Services	6	11	11	10	-1	-5.9	5.3
Social Assistance Services	1	3	4	6	1	26.3	26.6
Social Services	*59*	*86*	*86*	*89*	2	2.7	4.2
Subtotal	*526*	*756*	*744*	*811*	67	9.0	4.4
Owner-Occupied Dwellings and Property Operators	*83*	*112*	*113*	*114*	2	1.5	3.3
TOTAL ALL INDUSTRIES	**609**	**868**	**857**	**926**	**69**	**8.0**	**4.3**
Tourism sector	*20*	*35*	*36*	*30*	*-5*	*-15.3*	*4.1*

Activity units for Central Otago	2002	2010	2011	2012	change 2011-2012 Number	change 2011-2012 %	Change 2002 to 2012 %pa
Agriculture	882	838	824	803	-21	-2.5	-0.9
Aquaculture	0	0	0	1	1	na	na
Forestry and Logging	33	20	22	22	0	0.0	-4.0
Fishing Hunting and Trapping	3	10	10	12	2	20.0	14.9
Agriculture Forestry and Fishing Support Services	74	96	92	96	4	4.3	2.6
Coal Mining	0	0	0	0	0	na	na
Oil and Gas Extraction	0	0	0	0	0	na	na
Metal Ore Mining	3	2	3	3	0	0.0	0.0
Non-Metallic Mineral Mining and Quarrying	4	4	5	4	-1	-20.0	0.0
Exploration and Other Mining Support Services	0	1	2	3	1	50.0	na
Primary	*999*	*971*	*958*	*944*	-14	-1.5	-0.6
Food Product Manufacturing	13	14	14	14	0	0.0	0.7
Beverage and Tobacco Product Manufacturing	11	29	30	30	0	0.0	10.6
Textile Leather Clothing and Footwear Manufacturing	3	7	8	5	-3	-37.5	5.2
Wood Product Manufacturing	10	16	16	15	-1	-6.3	4.1
Pulp Paper and Converted Paper Product Manufacturing	1	1	1	1	0	0.0	0.0
Printing	2	2	2	3	1	50.0	4.1
Petroleum and Coal Product Manufacturing	1	1	1	1	0	0.0	0.0
Basic Chemical and Chemical Product Manufacturing	3	0	1	2	1	100.0	-4.0
Polymer Product and Rubber Product Manufacturing	0	2	3	4	1	33.3	na
Non-Metallic Mineral Product Manufacturing	7	14	12	11	-1	-8.3	4.6
Primary Metal and Metal Product Manufacturing	1	1	1	0	-1	-100.0	-100.0
Fabricated Metal Product Manufacturing	9	13	14	16	2	14.3	5.9
Transport Equipment Manufacturing	5	6	7	6	-1	-14.3	1.8
Machinery and Equipment Manufacturing	14	19	14	15	1	7.1	0.7
Furniture and Other Manufacturing	5	9	8	9	1	12.5	6.1
Manufacturing	*85*	*134*	*132*	*132*	0	0.0	4.5
Building Construction	50	133	130	125	-5	-3.8	9.6
Heavy and Civil Engineering Construction	21	25	27	25	-2	-7.4	1.8
Construction Services	123	235	227	206	-21	-9.3	5.3
Construction	*194*	*393*	*384*	*356*	-28	-7.3	6.3
Basic Material Wholesaling	24	35	38	37	-1	-2.6	4.4
Machinery and Equipment Wholesaling	13	17	17	17	0	0.0	2.7
Motor Vehicle and Motor Vehicle Parts Wholesaling	6	6	7	7	0	0.0	1.6
Grocery Liquor and Tobacco Product Wholesaling	17	16	18	20	2	11.1	1.6
Other Goods Wholesaling	5	12	11	12	1	9.1	9.1
Commission-Based Wholesaling	8	7	7	6	-1	-14.3	-2.8
Road Transport	39	40	41	40	-1	-2.4	0.3
Rail Transport	0	0	0	0	0	na	na
Water Transport	0	0	0	0	0	na	na
Air and Space Transport	1	2	1	3	2	200.0	11.6
Other Transport	0	7	6	8	2	33.3	na
Postal and Courier Pick-up and Delivery Services	21	31	31	33	2	6.5	4.6
Transport Support Services	1	1	4	5	1	25.0	17.5
Warehousing and Storage Services	3	5	4	3	-1	-25.0	0.0
Wholesale and Distribution	*138*	*179*	*185*	*191*	6	3.2	3.3
Motor Vehicle and Motor Vehicle Parts Retailing	14	18	18	19	1	5.6	3.1
Fuel Retailing	11	9	10	10	0	0.0	-0.9
Food Retailing	36	33	35	36	1	2.9	0.0
Other Store-Based Retailing	81	109	110	111	1	0.9	3.2
Non-Store Retailing and Retail Commission Based Buying and/or Selling	4	7	6	6	0	0.0	4.1
Accommodation	45	65	65	66	1	1.5	3.9
Food and Beverage Services	64	80	82	83	1	1.2	2.6
Repair and Maintenance	40	54	50	50	0	0.0	2.3
Personal and Other Services	41	55	57	58	1	1.8	3.5
Private Households Employing Staff	0	0	0	0	0	na	na
Retail Trade and Services	*336*	*430*	*433*	*439*	6	1.4	2.7
Electricity Supply	4	4	4	4	0	0.0	0.0
Gas Supply	0	0	0	0	0	na	na
Water Supply Sewerage and Drainage Services	2	6	8	7	-1	-12.5	13.3
Waste Collection Treatment and Disposal Services	3	4	5	6	1	20.0	7.2
Publishing (except Internet and Music Publishing)	2	4	5	5	0	0.0	9.6
Motion Picture and Sound Recording Activities	2	3	2	1	-1	-50.0	-6.7
Broadcasting (except Internet)	4	2	2	3	1	50.0	-2.8
Internet Publishing and Broadcasting	0	0	0	0	0	na	na
Telecommunications Services	1	0	1	1	0	0.0	0.0
Internet Service Providers Web Search Portals and Data Processing Services	1	0	0	0	0	na	-100.0
Library and Other Information Services	3	3	3	3	0	0.0	0.0
Finance	16	100	110	126	16	14.5	22.9
Insurance and Superannuation Funds	2	2	2	2	0	0.0	0.0
Auxiliary Finance and Insurance Services	11	21	22	25	3	13.6	8.6
Rental and Hiring Services (except Real Estate)	24	31	32	29	-3	-9.4	1.9
Property Operators and Real Estate Services	293	527	542	541	-1	-0.2	6.3
Professional Scientific and Technical Services (exc Comp Sys Dsn & related)	82	155	157	153	-4	-2.5	6.4
Computer System Design and Related Services	4	7	8	9	1	12.5	8.4
Administrative Services	20	48	47	39	-8	-17.0	6.9
Building Cleaning Pest Control and Other Support Services	24	30	29	28	-1	-3.4	1.6
Business Services	*498*	*947*	*979*	*982*	3	0.3	7.0
Heritage Activities	5	8	9	8	-1	-11.1	4.8
Artistic Activities	1	7	7	8	1	14.3	23.1
Sport and Recreation Activities	40	53	53	57	4	7.5	3.6
Gambling Activities	0	0	0	0	0	na	na
Arts and Recreation Services	*46*	*68*	*69*	*73*	4	5.8	4.7
Public Administration	13	10	10	10	0	0.0	-2.6
Defence	0	0	0	0	0	na	na
Public Order Safety and Regulatory Services	20	21	21	21	0	0.0	0.5
Preschool and School Education	29	32	32	33	1	3.1	1.3
Tertiary Education	2	3	3	5	2	66.7	9.6
Adult Community and Other Education	7	9	7	10	3	42.9	3.6
Hospitals	3	2	2	2	0	0.0	-4.0
Medical and Other Health Care Services	43	63	68	68	0	0.0	4.7
Residential Care Services	5	5	6	6	0	0.0	1.8
Social Assistance Services	4	10	8	8	0	0.0	7.2
Social Services	*126*	*155*	*157*	*163*	6	3.8	2.6
TOTAL ALL INDUSTRIES	**2,422**	**3,277**	**3,297**	**3,280**	**-17**	**-0.5**	**3.1**
Tourism sector	123	198	199	172	-27	-13.4	3.4

Table 8.5. Employment in Key Sectors, Central Otago District, 2002 to 2012

Key sectors employment (FTEs)	Year ending March				%pa change	
	2002	2010	2011	2012	*2011 to 2012*	*2002 to 2012*
Primary production	2,486	2,835	2,978	3,164	*6.2*	*2.4*
Primary processing	386	353	365	384	*5.3*	*0.0*
Creative	60	66	78	68	*-12.9*	*1.3*
Education and research	343	532	501	511	*1.9*	*4.1*
Engineering, machinery and equipment manufacturing	61	62	59	54	*-9.5*	*-1.3*
Key sectors (excluding Tourism)	**3,335**	**3,849**	**3,982**	**4,181**	***5.0***	***2.3***
Non-key sectors	**3,864**	**6,007**	**5,984**	**5,922**	***-1.0***	***4.4***
Total employment: Central Otago	**7,200**	**9,856**	**9,966**	**10,103**	***1.4***	***3.4***
Tourism sector	377	630	638	516	***-19.0***	***3.2***

Source: BERL Regional Database 2012

Table 8.6. GDP in Key Sectors, Central Otago District, 2002 to 2012

Key sectors GDP (2012$m)	Year ending March				%pa change	
	2002	2010	2011	2012	*2011 to 2012*	*2002 to 2012*
Primary production	151	192	178	250	*40.3*	*5.1*
Primary processing	42	49	51	55	*8.1*	*2.6*
Creative	3	2	3	3	*2.9*	*-1.6*
Education and research	25	29	27	27	*0.7*	*1.1*
Engineering, machinery and equipment manufacturing	6	6	6	5	*-7.2*	*-0.6*
Key sectors (excluding Tourism)	**227**	**279**	**265**	**341**	***28.6***	***4.1***
Non-key sectors	**297**	**475**	**478**	**469**	***-1.9***	***4.7***
Total GDP: Central Otago	**525**	**754**	**743**	**809**	***9.0***	***4.4***
Tourism sector	20	35	36	30	***-15.3***	***4.1***

Source: BERL Regional Database 2012

Table 8.7. Business Units in Key Sectors, Central Otago District, 2002 to 2012

Key sectors business units	Year ending March				%pa change	
	2002	2010	2011	2012	*2011 to 2012*	*2002 to 2012*
Primary production	999	971	958	944	*-1.5*	*-0.6*
Primary processing	35	60	61	60	*-1.6*	*5.5*
Creative	3	2	3	3	*2.9*	*-1.6*
Education and research	49	60	55	62	*12.7*	*2.4*
Engineering, machinery and equipment manufacturing	27	42	45	44	*-2.2*	*5.0*
Key sectors (excluding Tourism)	**1,113**	**1,135**	**1,122**		***-100.0***	***-100.0***
Non-key sectors	**1,309**	**2,142**	**2,175**		***-100.0***	***-100.0***
Total business units: Central Otago	**2,422**	**3,277**	**3,297**	**3,280**	***-0.5***	***3.1***
Tourism sector	123	198	199	172	***-13.4***	***3.4***

Source: BERL Regional Database 2012

8.7 Detailed tables - Clutha District

Employment (FTEs) for Clutha	2002	2010	2011	2012	change 2011-2012 Number	change 2011-2012 %	Change 2002 to 2012 %pa
Agriculture	2,484	2,779	2,994	2,850	-144	-4.8	1.4
Aquaculture	0	0	0	0	0	na	na
Forestry and Logging	147	134	151	145	-6	-3.9	-0.1
Fishing Hunting and Trapping	0	0	2	0	-2	-100.0	na
Agriculture Forestry and Fishing Support Services	617	524	515	622	107	20.7	0.1
Coal Mining	13	17	13	17	3	25.9	2.6
Oil and Gas Extraction	0	0	0	0	0	na	na
Metal Ore Mining	0	0	0	0	0	na	na
Non-Metallic Mineral Mining and Quarrying	65	28	22	33	11	51.1	-6.4
Exploration and Other Mining Support Services	0	0	0	0	0	na	na
Primary	*3,326*	*3,481*	*3,698*	*3,667*	-31	-0.8	1.0
Food Product Manufacturing	1,277	1,174	1,120	1,128	8	0.8	-1.2
Beverage and Tobacco Product Manufacturing	0	0	0	3	3	na	na
Textile Leather Clothing and Footwear Manufacturing	79	38	39	9	-30	-76.7	-19.4
Wood Product Manufacturing	417	232	250	239	-11	-4.3	-5.4
Pulp Paper and Converted Paper Product Manufacturing	0	0	0	0	0	na	na
Printing	41	53	60	55	-5	-7.6	2.9
Petroleum and Coal Product Manufacturing	0	0	0	0	0	na	na
Basic Chemical and Chemical Product Manufacturing	0	0	3	3	0	0.8	na
Polymer Product and Rubber Product Manufacturing	6	9	14	11	-3	-19.4	6.6
Non-Metallic Mineral Product Manufacturing	27	59	30	38	8	27.6	3.4
Primary Metal and Metal Product Manufacturing	0	0	0	0	0	na	na
Fabricated Metal Product Manufacturing	37	53	61	55	-6	-9.7	4.0
Transport Equipment Manufacturing	51	27	32	24	-8	-25.2	-7.3
Machinery and Equipment Manufacturing	22	44	47	48	0	0.8	8.3
Furniture and Other Manufacturing	6	0	0	0	0	na	-100.0
Manufacturing	*1,963*	*1,688*	*1,657*	*1,615*	-42	-2.5	-1.9
Building Construction	195	260	206	201	-5	-2.3	0.3
Heavy and Civil Engineering Construction	244	270	251	271	19	7.7	1.0
Construction Services	119	203	174	188	14	8.1	4.7
Construction	*559*	*733*	*631*	*660*	29	4.6	1.7
Basic Material Wholesaling	41	65	58	54	-5	-8.2	2.7
Machinery and Equipment Wholesaling	22	13	16	21	5	34.3	-0.3
Motor Vehicle and Motor Vehicle Parts Wholesaling	3	0	0	0	0	na	-100.0
Grocery Liquor and Tobacco Product Wholesaling	9	3	0	0	0	na	-100.0
Other Goods Wholesaling	0	9	9	12	3	34.3	na
Commission-Based Wholesaling	6	13	10	7	-3	-32.8	0.3
Road Transport	271	249	197	209	12	5.9	-2.6
Rail Transport	3	3	0	3	3	na	0.3
Water Transport	0	0	0	0	0	na	na
Air and Space Transport	0	0	0	0	0	na	na
Other Transport	0	0	0	0	0	na	na
Postal and Courier Pick-up and Delivery Services	13	8	16	18	2	11.9	3.1
Transport Support Services	0	3	6	9	3	51.1	na
Warehousing and Storage Services	0	0	0	0	0	na	na
Wholesale and Distribution	*368*	*366*	*312*	*333*	20	6.5	-1.0
Motor Vehicle and Motor Vehicle Parts Retailing	33	56	51	64	13	25.7	6.8
Fuel Retailing	102	57	74	50	-24	-32.8	-7.0
Food Retailing	207	214	207	218	11	5.5	0.5
Other Store-Based Retailing	176	161	161	173	12	7.7	-0.2
Non-Store Retailing and Retail Commission Based Buying and/or Selling	3	0	0	0	0	na	-100.0
Accommodation	79	102	96	105	9	9.1	2.8
Food and Beverage Services	150	165	169	147	-22	-13.0	-0.2
Repair and Maintenance	97	108	109	109	1	0.8	1.2
Personal and Other Services	37	60	59	64	5	8.2	5.6
Private Households Employing Staff	0	0	0	0	0	na	na
Retail Trade and Services	*886*	*923*	*925*	*930*	5	0.5	0.5
Electricity Supply	6	9	6	12	6	101.5	7.7
Gas Supply	0	0	0	0	0	na	na
Water Supply Sewerage and Drainage Services	0	0	0	0	0	na	na
Waste Collection Treatment and Disposal Services	3	11	14	12	-3	-19.4	15.6
Publishing (except Internet and Music Publishing)	14	15	21	17	-4	-19.4	2.2
Motion Picture and Sound Recording Activities	0	3	3	0	-3	-100.0	na
Broadcasting (except Internet)	0	0	0	0	0	na	na
Internet Publishing and Broadcasting	0	0	0	0	0	na	na
Telecommunications Services	0	0	0	0	0	na	na
Internet Service Providers Web Search Portals and Data Processing Services	0	0	0	2	2	na	na
Library and Other Information Services	4	7	7	7	0	0.8	4.7
Finance	45	49	42	45	3	8.1	0.0
Insurance and Superannuation Funds	3	3	6	6	0	0.8	7.5
Auxiliary Finance and Insurance Services	6	3	3	3	0	0.8	-6.0
Rental and Hiring Services (except Real Estate)	0	10	8	11	3	34.3	na
Property Operators and Real Estate Services	17	39	29	39	10	34.3	8.4
Professional Scientific and Technical Services (exc Comp Sys Dsn & related)	146	185	161	169	8	5.0	1.5
Computer System Design and Related Services	0	0	0	0	0	na	na
Administrative Services	6	19	19	22	3	15.1	13.1
Building Cleaning Pest Control and Other Support Services	33	31	28	35	7	23.1	0.6
Business Services	*284*	*385*	*349*	*381*	33	9.4	3.0
Heritage Activities	3	5	6	3	-3	-49.6	0.5
Artistic Activities	2	0	2	0	-2	-100.0	-100.0
Sport and Recreation Activities	34	22	27	17	-10	-35.9	-6.5
Gambling Activities	0	0	0	0	0	na	na
Arts and Recreation Services	*39*	*28*	*35*	*20*	-15	-42.3	-6.4
Public Administration	74	83	77	72	-6	-7.3	-0.3
Defence	0	0	0	0	0	na	na
Public Order Safety and Regulatory Services	106	92	379	375	-5	-1.2	13.5
Preschool and School Education	382	373	385	366	-19	-5.0	-0.4
Tertiary Education	0	93	58	21	-37	-63.2	na
Adult Community and Other Education	14	7	11	12	0	0.8	-2.2
Hospitals	64	80	86	115	29	34.3	6.1
Medical and Other Health Care Services	59	89	89	83	-7	-7.7	3.4
Residential Care Services	86	169	110	119	9	8.5	3.3
Social Assistance Services	22	39	87	120	33	37.4	18.6
Social Services	*807*	*1,025*	*1,284*	*1,282*	-2	-0.1	4.7
TOTAL ALL INDUSTRIES	**8,231**	**8,629**	**8,891**	**8,888**	**-3**	**0.0**	**0.8**
Tourism sector	*181*	*281*	*286*	*205*	*-81*	*-28.4*	*1.3*

Real value added (GDP 2012$m) for Clutha	2002	2010	2011	2012	change 2011-2012		Change 2002 to 2012 %pa
					Number	%	
Agriculture	147	180	171	214	43	25.3	3.8
Aquaculture	0	0	0	0	0	na	na
Forestry and Logging	48	65	74	72	-1	-1.9	4.1
Fishing Hunting and Trapping	0	0	2	0	-2	-100.0	na
Agriculture Forestry and Fishing Support Services	36	34	29	47	17	58.9	2.5
Coal Mining	3	2	1	1	0	-1.3	-8.4
Oil and Gas Extraction	0	0	0	0	0	na	na
Metal Ore Mining	0	0	0	0	0	na	na
Non-Metallic Mineral Mining and Quarrying	14	3	2	2	0	18.4	-16.4
Exploration and Other Mining Support Services	0	0	0	0	0	na	na
Primary	*248*	*284*	*279*	*336*	58	20.8	3.1
Food Product Manufacturing	136	156	147	151	3	2.4	1.1
Beverage and Tobacco Product Manufacturing	0	0	0	0	0	na	na
Textile Leather Clothing and Footwear Manufacturing	5	4	4	1	-3	-77.8	-16.4
Wood Product Manufacturing	53	39	42	42	0	-0.7	-2.3
Pulp Paper and Converted Paper Product Manufacturing	0	0	0	0	0	na	na
Printing	2	2	2	3	0	6.5	5.7
Petroleum and Coal Product Manufacturing	0	0	0	0	0	na	na
Basic Chemical and Chemical Product Manufacturing	0	0	1	1	0	-3.0	na
Polymer Product and Rubber Product Manufacturing	1	2	4	3	-1	-22.4	7.0
Non-Metallic Mineral Product Manufacturing	4	9	5	6	1	26.1	3.7
Primary Metal and Metal Product Manufacturing	0	0	0	0	0	na	na
Fabricated Metal Product Manufacturing	5	5	6	6	-1	-8.2	2.6
Transport Equipment Manufacturing	4	2	3	2	-1	-21.7	-5.4
Machinery and Equipment Manufacturing	2	4	5	5	0	5.5	10.5
Furniture and Other Manufacturing	0	0	0	0	0	na	-100.0
Manufacturing	*212*	*224*	*219*	*220*	0	0.2	0.4
Building Construction	13	16	13	12	-1	-9.8	-1.0
Heavy and Civil Engineering Construction	17	16	16	16	0	-0.5	-0.3
Construction Services	8	12	11	11	0	-0.2	3.3
Construction	*38*	*45*	*41*	*39*	-1	-3.5	0.4
Basic Material Wholesaling	5	7	7	6	0	-7.1	2.8
Machinery and Equipment Wholesaling	3	1	2	2	1	36.0	-0.2
Motor Vehicle and Motor Vehicle Parts Wholesaling	0	0	0	0	0	na	-100.0
Grocery Liquor and Tobacco Product Wholesaling	1	0	0	0	0	na	-100.0
Other Goods Wholesaling	0	1	1	1	0	36.0	na
Commission-Based Wholesaling	1	1	1	1	0	-32.0	0.4
Road Transport	33	35	29	30	1	3.8	-1.0
Rail Transport	0	0	0	0	0	na	1.9
Water Transport	0	0	0	0	0	na	na
Air and Space Transport	0	0	0	0	0	na	na
Other Transport	0	0	0	0	0	na	na
Postal and Courier Pick-up and Delivery Services	2	1	2	3	0	9.7	4.7
Transport Support Services	0	0	1	1	0	48.0	na
Warehousing and Storage Services	0	0	0	0	0	na	na
Wholesale and Distribution	*45*	*49*	*43*	*45*	2	5.6	0.2
Motor Vehicle and Motor Vehicle Parts Retailing	2	4	3	5	1	34.5	11.8
Fuel Retailing	5	4	5	4	-1	-28.1	-2.6
Food Retailing	9	14	14	16	2	12.8	5.2
Other Store-Based Retailing	8	11	11	12	2	15.3	4.5
Non-Store Retailing and Retail Commission Based Buying and/or Selling	0	0	0	0	0	na	-100.0
Accommodation	3	3	3	3	0	9.8	3.0
Food and Beverage Services	5	5	6	5	-1	-12.5	0.0
Repair and Maintenance	6	5	5	5	0	0.2	-0.7
Personal and Other Services	2	3	3	3	0	7.5	3.6
Private Households Employing Staff	0	0	0	0	0	na	na
Retail Trade and Services	*39*	*50*	*50*	*53*	3	6.1	3.1
Electricity Supply	2	4	2	4	2	92.3	6.1
Gas Supply	0	0	0	0	0	na	na
Water Supply Sewerage and Drainage Services	0	0	0	0	0	na	na
Waste Collection Treatment and Disposal Services	1	4	5	4	-1	-23.1	13.8
Publishing (except Internet and Music Publishing)	1	1	1	1	0	-7.0	5.0
Motion Picture and Sound Recording Activities	0	0	0	0	0	-100.0	na
Broadcasting (except Internet)	0	0	0	0	0	na	na
Internet Publishing and Broadcasting	0	0	0	0	0	na	na
Telecommunications Services	0	0	0	0	0	na	na
Internet Service Providers Web Search Portals and Data Processing Services	0	0	0	2	2	na	na
Library and Other Information Services	0	0	0	0	0	0.2	2.7
Finance	6	8	7	7	0	7.2	2.0
Insurance and Superannuation Funds	0	0	1	1	0	-0.1	9.6
Auxiliary Finance and Insurance Services	1	0	0	0	0	-0.1	-4.1
Rental and Hiring Services (except Real Estate)	0	3	2	3	1	34.3	na
Property Operators and Real Estate Services	2	4	3	4	1	34.6	9.3
Professional Scientific and Technical Services (exc Comp Sys Dsn & related)	15	17	15	16	1	6.5	0.5
Computer System Design and Related Services	0	0	0	0	0	na	na
Administrative Services	0	1	1	1	0	17.0	13.8
Building Cleaning Pest Control and Other Support Services	1	1	1	2	0	25.2	1.2
Business Services	*30*	*45*	*40*	*46*	7	16.7	4.4
Heritage Activities	0	0	0	0	0	-50.7	-0.5
Artistic Activities	0	0	0	0	0	-100.0	-100.0
Sport and Recreation Activities	3	2	2	1	-1	-37.3	-7.4
Gambling Activities	0	0	0	0	0	na	na
Arts and Recreation Services	*3*	*2*	*3*	*1*	-1	-43.6	-7.3
Public Administration	6	8	7	7	-1	-9.5	1.6
Defence	0	0	0	0	0	na	na
Public Order Safety and Regulatory Services	6	7	28	27	-1	-2.8	15.6
Preschool and School Education	25	18	19	18	-1	-3.9	-3.4
Tertiary Education	0	5	3	1	-2	-62.8	na
Adult Community and Other Education	1	0	1	1	0	1.9	-5.1
Hospitals	6	6	7	9	2	29.4	4.0
Medical and Other Health Care Services	6	7	7	6	-1	-11.1	1.3
Residential Care Services	8	13	9	9	0	4.6	1.2
Social Assistance Services	1	2	4	6	2	36.6	16.4
Social Services	*59*	*66*	*84*	*84*	-1	-1.0	3.5
Subtotal	*674*	*764*	*758*	*825*	67	8.8	2.0
Owner-Occupied Dwellings and Property Operators	*96*	*108*	*108*	*107*	0	-0.5	1.1
TOTAL ALL INDUSTRIES	**769**	**871**	**866**	**932**	**67**	**7.7**	**1.9**
Tourism sector	*10*	*17*	*17*	*13*	*-4*	*-24.1*	*2.4*

Activity units for Clutha	2002	2010	2011	2012	change 2011-2012		Change 2002 to 2012 %pa
					Number	%	
Agriculture	1,446	1,281	1,243	1,237	-6	-0.5	-1.5
Aquaculture	0	1	1	1	0	0.0	na
Forestry and Logging	138	154	152	148	-4	-2.6	0.7
Fishing Hunting and Trapping	18	9	11	7	-4	-36.4	-9.0
Agriculture Forestry and Fishing Support Services	102	129	117	127	10	8.5	2.2
Coal Mining	1	1	1	1	0	0.0	0.0
Oil and Gas Extraction	0	0	0	0	0	na	na
Metal Ore Mining	0	0	0	0	0	na	na
Non-Metallic Mineral Mining and Quarrying	3	5	4	4	0	0.0	2.9
Exploration and Other Mining Support Services	0	0	0	0	0	na	na
Primary	*1,708*	*1,580*	*1,529*	*1,525*	-4	-0.3	-1.1
Food Product Manufacturing	7	8	7	7	0	0.0	0.0
Beverage and Tobacco Product Manufacturing	0	2	2	2	0	0.0	na
Textile Leather Clothing and Footwear Manufacturing	7	4	2	1	-1	-50.0	-17.7
Wood Product Manufacturing	18	17	17	16	-1	-5.9	-1.2
Pulp Paper and Converted Paper Product Manufacturing	0	0	0	0	0	na	na
Printing	2	3	3	3	0	0.0	4.1
Petroleum and Coal Product Manufacturing	0	0	0	0	0	na	na
Basic Chemical and Chemical Product Manufacturing	0	0	1	2	1	100.0	na
Polymer Product and Rubber Product Manufacturing	1	1	1	1	0	0.0	0.0
Non-Metallic Mineral Product Manufacturing	3	4	4	3	-1	-25.0	0.0
Primary Metal and Metal Product Manufacturing	0	0	0	0	0	na	na
Fabricated Metal Product Manufacturing	7	11	12	12	0	0.0	5.5
Transport Equipment Manufacturing	5	4	5	4	-1	-20.0	-2.2
Machinery and Equipment Manufacturing	12	7	7	7	0	0.0	-5.2
Furniture and Other Manufacturing	3	2	2	2	0	0.0	-4.0
Manufacturing	*65*	*63*	*63*	*60*	-3	-4.8	-0.8
Building Construction	42	58	57	56	-1	-1.8	2.9
Heavy and Civil Engineering Construction	18	12	10	9	-1	-10.0	-6.7
Construction Services	71	94	97	98	1	1.0	3.3
Construction	*131*	*164*	*164*	*163*	-1	-0.6	2.2
Basic Material Wholesaling	19	19	18	18	0	0.0	-0.5
Machinery and Equipment Wholesaling	2	6	6	6	0	0.0	11.6
Motor Vehicle and Motor Vehicle Parts Wholesaling	3	4	4	5	1	25.0	5.2
Grocery Liquor and Tobacco Product Wholesaling	5	4	2	1	-1	-50.0	-14.9
Other Goods Wholesaling	4	9	10	9	-1	-10.0	8.4
Commission-Based Wholesaling	6	5	5	4	-1	-20.0	-4.0
Road Transport	38	36	34	32	-2	-5.9	-1.7
Rail Transport	1	1	1	1	0	0.0	0.0
Water Transport	0	2	2	2	0	0.0	na
Air and Space Transport	0	0	0	0	0	na	na
Other Transport	1	1	3	4	1	33.3	14.9
Postal and Courier Pick-up and Delivery Services	12	11	10	12	2	20.0	0.0
Transport Support Services	1	2	3	2	-1	-33.3	7.2
Warehousing and Storage Services	0	0	0	0	0	na	na
Wholesale and Distribution	*92*	*100*	*98*	*96*	-2	-2.0	0.4
Motor Vehicle and Motor Vehicle Parts Retailing	7	10	9	11	2	22.2	4.6
Fuel Retailing	11	11	10	9	-1	-10.0	-2.0
Food Retailing	36	29	30	33	3	10.0	-0.9
Other Store-Based Retailing	66	58	62	62	0	0.0	-0.6
Non-Store Retailing and Retail Commission Based Buying and/or Selling	8	1	1	2	1	100.0	-12.9
Accommodation	31	41	39	42	3	7.7	3.1
Food and Beverage Services	40	44	42	40	-2	-4.8	0.0
Repair and Maintenance	38	35	35	37	2	5.7	-0.3
Personal and Other Services	32	42	48	48	0	0.0	4.1
Private Households Employing Staff	0	0	0	0	0	na	na
Retail Trade and Services	*269*	*271*	*276*	*284*	8	2.9	0.5
Electricity Supply	1	2	2	4	2	100.0	14.9
Gas Supply	0	0	0	0	0	na	na
Water Supply Sewerage and Drainage Services	0	0	0	0	0	na	na
Waste Collection Treatment and Disposal Services	3	4	4	4	0	0.0	2.9
Publishing (except Internet and Music Publishing)	1	2	2	2	0	0.0	7.2
Motion Picture and Sound Recording Activities	1	4	4	3	-1	-25.0	11.6
Broadcasting (except Internet)	0	0	0	0	0	na	na
Internet Publishing and Broadcasting	0	0	0	0	0	na	na
Telecommunications Services	0	0	0	0	0	na	na
Internet Service Providers Web Search Portals and Data Processing Services	0	1	1	1	0	0.0	na
Library and Other Information Services	4	4	4	4	0	0.0	0.0
Finance	15	71	73	83	10	13.7	18.7
Insurance and Superannuation Funds	2	2	2	2	0	0.0	0.0
Auxiliary Finance and Insurance Services	7	4	6	5	-1	-16.7	-3.3
Rental and Hiring Services (except Real Estate)	14	17	15	14	-1	-6.7	0.0
Property Operators and Real Estate Services	296	507	507	505	-2	-0.4	5.5
Professional Scientific and Technical Services (exc Comp Sys Dsn & related)	43	47	47	47	0	0.0	0.9
Computer System Design and Related Services	1	0	1	1	0	0.0	0.0
Administrative Services	11	18	15	15	0	0.0	3.2
Building Cleaning Pest Control and Other Support Services	6	14	14	13	-1	-7.1	8.0
Business Services	*405*	*697*	*697*	*703*	6	0.9	5.7
Heritage Activities	2	4	4	4	0	0.0	7.2
Artistic Activities	4	2	2	2	0	0.0	-6.7
Sport and Recreation Activities	29	30	31	31	0	0.0	0.7
Gambling Activities	0	0	0	0	0	na	na
Arts and Recreation Services	*35*	*36*	*37*	*37*	0	0.0	0.6
Public Administration	13	11	11	11	0	0.0	-1.7
Defence	0	0	0	0	0	na	na
Public Order Safety and Regulatory Services	23	25	25	25	0	0.0	0.8
Preschool and School Education	41	43	41	42	1	2.4	0.2
Tertiary Education	0	2	2	2	0	0.0	na
Adult Community and Other Education	9	8	7	8	1	14.3	-1.2
Hospitals	2	2	2	2	0	0.0	0.0
Medical and Other Health Care Services	36	29	32	33	1	3.1	-0.9
Residential Care Services	6	6	4	4	0	0.0	-4.0
Social Assistance Services	4	6	8	7	-1	-12.5	5.8
Social Services	*134*	*132*	*132*	*134*	2	1.5	0.0
TOTAL ALL INDUSTRIES	**2,839**	**3,043**	**2,996**	**3,002**	**6**	**0.2**	**0.6**
Tourism sector	59	98	98	73	-24	-24.9	2.2

Table 8.8. Employment in Key Sectors, Clutha District, 2002 to 2012

Key sectors employment (FTEs)	Year ending March				%pa change	
	2002	2010	2011	2012	2011 to 2012	2002 to 2012
Primary production	3,326	3,481	3,698	3,667	-0.8	1.0
Primary processing	1,693	1,405	1,370	1,371	0.1	-2.1
Creative	66	71	89	78	-12.5	1.7
Education and research	396	471	453	397	-12.4	0.0
Engineering, machinery and equipment manufacturing	35	72	72	77	7.6	8.1
Key sectors (excluding Tourism)	**5,517**	**5,501**	**5,682**	**5,590**	***-1.6***	***0.1***
Non-key sectors	**2,714**	**3,128**	**3,210**	**3,299**	***2.8***	***2.0***
Total employment: Clutha	**8,231**	**8,629**	**8,891**	**8,888**	***0.0***	***0.8***
Tourism sector	181	281	286	205	***-28.4***	***1.3***

Source: BERL Regional Database 2012

Table 8.9. GDP in Key Sectors, Clutha District, 2002 to 2012

Key sectors GDP (2012$m)	Year ending March				%pa change	
	2002	2010	2011	2012	2011 to 2012	2002 to 2012
Primary production	248	283	278	336	20.8	3.1
Primary processing	188	194	189	193	1.9	0.2
Creative	2	3	3	3	-0.3	3.2
Education and research	26	23	22	20	-11.4	-3.0
Engineering, machinery and equipment manufacturing	3	6	7	8	11.0	9.0
Key sectors (excluding Tourism)	**468**	**509**	**499**	**559**	***11.9***	***1.8***
Non-key sectors	**204**	**253**	**257**	**264**	***2.8***	***2.6***
Total GDP: Clutha	**672**	**762**	**756**	**823**	***8.8***	***2.0***
Tourism sector	10	17	17	13	***-24.1***	***2.4***

Source: BERL Regional Database 2012

Table 8.10. Business Units in Key Sectors, Clutha District, 2002 to 2012

Key sectors business units	Year ending March				%pa change	
	2002	2010	2011	2012	2011 to 2012	2002 to 2012
Primary production	1,708	1,580	1,529	1,525	-0.3	-1.1
Primary processing	25	27	26	25	-3.8	0.0
Creative	2	3	3	3	-0.3	3.2
Education and research	49	51	47	49	4.3	0.0
Engineering, machinery and equipment manufacturing	14	13	15	16	6.7	1.3
Key sectors (excluding Tourism)	**1,798**	**1,674**	**1,620**	**1,618**	***-0.1***	***-1.1***
Non-key sectors	**1,041**	**1,369**	**1,376**	**1,384**	***0.6***	***2.9***
Total business units: Clutha	**2,839**	**3,043**	**2,996**	**3,002**	***0.2***	***0.6***
Tourism sector	59	98	98	73	***-24.9***	***2.2***

Source: BERL Regional Database 2012

8.8 Detailed tables - Dunedin City

Employment (FTEs) for Dunedin City	2002	2010	2011	2012	change 2011-2012		Change 2002 to 2012 %pa
					Number	%	
Agriculture	1,035	786	937	1,003	66	7.1	-0.3
Aquaculture	6	0	0	0	0	na	-100.0
Forestry and Logging	101	70	87	74	-12	-14.1	-3.0
Fishing Hunting and Trapping	24	15	17	17	0	0.8	-3.1
Agriculture Forestry and Fishing Support Services	172	167	158	198	39	24.7	1.4
Coal Mining	0	0	0	0	0	na	na
Oil and Gas Extraction	0	0	0	0	0	na	na
Metal Ore Mining	0	0	0	0	0	na	na
Non-Metallic Mineral Mining and Quarrying	10	56	56	51	-5	-9.1	18.1
Exploration and Other Mining Support Services	0	99	0	0	0	na	na
Primary	*1,349*	*1,194*	*1,256*	*1,344*	88	7.0	0.0
Food Product Manufacturing	3,070	2,307	1,162	928	-234	-20.2	-11.3
Beverage and Tobacco Product Manufacturing	54	65	79	90	11	13.5	5.3
Textile Leather Clothing and Footwear Manufacturing	704	240	234	222	-11	-4.9	-10.9
Wood Product Manufacturing	372	291	277	314	37	13.3	-1.7
Pulp Paper and Converted Paper Product Manufacturing	73	51	49	29	-20	-40.7	-8.7
Printing	433	217	232	224	-8	-3.6	-6.4
Petroleum and Coal Product Manufacturing	3	61	61	61	0	0.8	34.2
Basic Chemical and Chemical Product Manufacturing	124	88	86	94	8	8.7	-2.7
Polymer Product and Rubber Product Manufacturing	158	95	94	90	-5	-5.2	-5.5
Non-Metallic Mineral Product Manufacturing	110	132	93	91	-2	-2.5	-1.9
Primary Metal and Metal Product Manufacturing	119	94	100	139	40	39.9	1.6
Fabricated Metal Product Manufacturing	454	552	586	603	17	2.9	2.9
Transport Equipment Manufacturing	285	322	317	201	-116	-36.6	-3.4
Machinery and Equipment Manufacturing	1,037	503	502	498	-3	-0.7	-7.1
Furniture and Other Manufacturing	138	193	209	205	-4	-1.7	4.1
Manufacturing	*7,135*	*5,208*	*4,082*	*3,790*	-292	-7.1	-6.1
Building Construction	443	1,175	1,000	985	-16	-1.6	8.3
Heavy and Civil Engineering Construction	733	901	991	955	-36	-3.6	2.7
Construction Services	1,622	2,628	2,531	2,451	-80	-3.2	4.2
Construction	*2,798*	*4,704*	*4,522*	*4,390*	-132	-2.9	4.6
Basic Material Wholesaling	515	540	460	439	-22	-4.7	-1.6
Machinery and Equipment Wholesaling	499	573	547	580	34	6.1	1.5
Motor Vehicle and Motor Vehicle Parts Wholesaling	121	152	144	149	5	3.5	2.1
Grocery Liquor and Tobacco Product Wholesaling	595	580	646	683	37	5.7	1.4
Other Goods Wholesaling	293	275	263	274	12	4.5	-0.6
Commission-Based Wholesaling	27	22	17	20	3	20.9	-2.9
Road Transport	773	809	858	892	34	4.0	1.4
Rail Transport	54	44	50	56	6	11.9	0.3
Water Transport	24	8	8	8	0	0.8	-10.7
Air and Space Transport	40	50	50	51	0	0.8	2.4
Other Transport	60	53	74	78	4	5.7	2.6
Postal and Courier Pick-up and Delivery Services	468	356	298	318	20	6.8	-3.8
Transport Support Services	358	542	576	565	-11	-1.9	4.7
Warehousing and Storage Services	227	55	83	73	-11	-12.7	-10.8
Wholesale and Distribution	*4,055*	*4,058*	*4,074*	*4,186*	112	2.7	0.3
Motor Vehicle and Motor Vehicle Parts Retailing	538	502	493	500	7	1.5	-0.7
Fuel Retailing	291	188	204	199	-5	-2.2	-3.7
Food Retailing	1,920	1,617	1,706	1,600	-107	-6.3	-1.8
Other Store-Based Retailing	3,187	2,728	2,866	2,877	11	0.4	-1.0
Non-Store Retailing and Retail Commission Based Buying and/or Selling	38	7	6	13	6	95.6	-10.3
Accommodation	985	1,029	1,198	1,368	170	14.2	3.3
Food and Beverage Services	1,888	2,158	2,190	2,307	117	5.4	2.0
Repair and Maintenance	695	774	698	727	29	4.2	0.4
Personal and Other Services	983	989	988	1,001	14	1.4	0.2
Private Households Employing Staff	0	0	0	0	0	na	na
Retail Trade and Services	*10,525*	*9,992*	*10,349*	*10,592*	243	2.3	0.1
Electricity Supply	90	144	147	153	6	4.2	5.5
Gas Supply	3	28	22	28	6	25.9	24.0
Water Supply Sewerage and Drainage Services	114	105	111	106	-5	-4.3	-0.7
Waste Collection Treatment and Disposal Services	47	28	34	73	39	115.9	4.4
Publishing (except Internet and Music Publishing)	666	614	608	552	-56	-9.2	-1.9
Motion Picture and Sound Recording Activities	146	114	109	112	3	2.4	-2.6
Broadcasting (except Internet)	122	105	103	107	4	4.0	-1.3
Internet Publishing and Broadcasting	0	0	0	0	0	na	na
Telecommunications Services	47	67	73	67	-6	-7.9	3.7
Internet Service Providers Web Search Portals and Data Processing Services	39	29	21	9	-12	-56.8	-13.6
Library and Other Information Services	54	135	136	129	-7	-4.8	9.1
Finance	800	532	542	538	-4	-0.8	-3.9
Insurance and Superannuation Funds	104	99	80	88	9	11.0	-1.6
Auxiliary Finance and Insurance Services	317	362	376	389	13	3.5	2.1
Rental and Hiring Services (except Real Estate)	192	250	267	264	-3	-1.0	3.2
Property Operators and Real Estate Services	311	355	399	344	-55	-13.8	1.0
Professional Scientific and Technical Services (exc Comp Sys Dsn & related)	1,800	2,631	2,737	2,912	175	6.4	4.9
Computer System Design and Related Services	119	184	204	185	-19	-9.3	4.5
Administrative Services	1,374	1,381	1,386	1,277	-110	-7.9	-0.7
Building Cleaning Pest Control and Other Support Services	884	855	820	831	12	1.4	-0.6
Business Services	*7,229*	*8,017*	*8,173*	*8,164*	-9	-0.1	1.2
Heritage Activities	228	384	401	418	17	4.3	6.2
Artistic Activities	72	82	60	68	8	13.7	-0.5
Sport and Recreation Activities	452	662	611	625	14	2.2	3.3
Gambling Activities	219	173	172	202	29	17.1	-0.8
Arts and Recreation Services	*970*	*1,300*	*1,244*	*1,313*	68	5.5	3.1
Public Administration	1,272	1,446	1,502	1,462	-41	-2.7	1.4
Defence	249	20	22	22	0	0.8	-21.4
Public Order Safety and Regulatory Services	866	1,132	1,335	1,255	-80	-6.0	3.8
Preschool and School Education	2,098	2,170	2,273	2,140	-133	-5.8	0.2
Tertiary Education	1,490	4,559	4,367	4,139	-229	-5.2	10.8
Adult Community and Other Education	95	224	224	229	5	2.1	9.2
Hospitals	2,644	2,960	2,951	3,098	147	5.0	1.6
Medical and Other Health Care Services	462	1,502	1,465	1,452	-13	-0.9	12.1
Residential Care Services	1,169	1,311	1,340	1,494	154	11.5	2.5
Social Assistance Services	671	1,470	1,542	1,323	-219	-14.2	7.0
Social Services	*11,014*	*16,794*	*17,022*	*16,614*	-409	-2.4	4.2
TOTAL ALL INDUSTRIES	**45,075**	**51,268**	**50,722**	**50,393**	**-329**	**-0.6**	**1.1**
Tourism sector	*2,154*	*2,748*	*2,979*	*3,523*	*543*	*18.2*	*5.0*

Real value added (GDP 2012$m) for Dunedin City	2002	2010	2011	2012	change 2011-2012 Number	change 2011-2012 %	Change 2002 to 2012 %pa
Agriculture	61	51	53	75	22	40.9	2.1
Aquaculture	4	0	0	0	0	na	-100.0
Forestry and Logging	33	34	42	37	-5	-12.4	1.1
Fishing Hunting and Trapping	13	10	11	12	1	7.4	-1.4
Agriculture Forestry and Fishing Support Services	10	11	9	15	6	64.1	3.8
Coal Mining	0	0	0	0	0	na	na
Oil and Gas Extraction	0	0	0	0	0	na	na
Metal Ore Mining	0	0	0	0	0	na	na
Non-Metallic Mineral Mining and Quarrying	2	5	5	3	-1	-28.8	5.5
Exploration and Other Mining Support Services	0	9	0	0	0	na	na
Primary	*124*	*120*	*121*	*142*	22	18.1	1.4
Food Product Manufacturing	326	306	153	124	-29	-18.9	-9.2
Beverage and Tobacco Product Manufacturing	6	9	10	12	2	15.3	7.7
Textile Leather Clothing and Footwear Manufacturing	42	24	21	19	-2	-9.2	-7.7
Wood Product Manufacturing	47	49	47	55	8	17.6	1.6
Pulp Paper and Converted Paper Product Manufacturing	9	9	8	5	-3	-38.5	-5.7
Printing	16	10	10	11	1	11.2	-3.9
Petroleum and Coal Product Manufacturing	1	16	16	16	0	-3.0	34.6
Basic Chemical and Chemical Product Manufacturing	31	23	23	24	1	4.7	-2.4
Polymer Product and Rubber Product Manufacturing	39	25	25	23	-2	-8.7	-5.2
Non-Metallic Mineral Product Manufacturing	17	21	15	15	-1	-3.6	-1.6
Primary Metal and Metal Product Manufacturing	15	10	11	15	4	42.3	0.2
Fabricated Metal Product Manufacturing	56	57	62	65	3	4.6	1.5
Transport Equipment Manufacturing	24	28	31	21	-11	-33.6	-1.5
Machinery and Equipment Manufacturing	88	44	50	52	2	4.0	-5.2
Furniture and Other Manufacturing	9	14	14	14	0	-1.6	5.0
Manufacturing	*726*	*642*	*496*	*470*	-27	-5.4	-4.3
Building Construction	30	72	64	59	-6	-9.1	6.9
Heavy and Civil Engineering Construction	50	55	64	57	-7	-11.0	1.4
Construction Services	110	160	163	146	-17	-10.6	2.9
Construction	*189*	*287*	*291*	*261*	-30	-10.4	3.3
Basic Material Wholesaling	60	60	54	52	-2	-3.5	-1.5
Machinery and Equipment Wholesaling	58	64	64	69	5	7.4	1.6
Motor Vehicle and Motor Vehicle Parts Wholesaling	14	17	17	18	1	4.8	2.2
Grocery Liquor and Tobacco Product Wholesaling	70	65	75	81	5	7.0	1.5
Other Goods Wholesaling	34	31	31	32	2	5.8	-0.5
Commission-Based Wholesaling	3	2	2	2	0	22.4	-2.8
Road Transport	94	115	126	128	2	1.8	3.1
Rail Transport	7	6	7	8	1	9.7	1.9
Water Transport	3	1	1	1	0	-1.3	-9.3
Air and Space Transport	5	7	7	7	0	-1.3	4.1
Other Transport	7	7	11	11	0	3.6	4.2
Postal and Courier Pick-up and Delivery Services	57	50	44	46	2	4.6	-2.2
Transport Support Services	44	77	84	81	-3	-3.9	6.4
Warehousing and Storage Services	28	8	12	10	-2	-14.5	-9.4
Wholesale and Distribution	*485*	*511*	*535*	*547*	11	2.1	1.2
Motor Vehicle and Motor Vehicle Parts Retailing	24	34	33	36	3	8.6	3.9
Fuel Retailing	13	13	14	14	1	4.6	0.8
Food Retailing	87	109	114	114	0	0.3	2.8
Other Store-Based Retailing	144	184	192	206	14	7.4	3.6
Non-Store Retailing and Retail Commission Based Buying and/or Selling	2	0	0	1	0	109.3	-6.2
Accommodation	32	33	39	45	6	14.9	3.5
Food and Beverage Services	61	69	72	76	4	6.0	2.2
Repair and Maintenance	40	38	34	35	1	3.5	-1.5
Personal and Other Services	57	48	48	48	0	0.8	-1.7
Private Households Employing Staff	0	0	0	0	0	na	na
Retail Trade and Services	*461*	*528*	*545*	*575*	30	5.5	2.2
Electricity Supply	37	57	55	54	0	-0.5	3.9
Gas Supply	1	11	8	10	2	20.2	22.1
Water Supply Sewerage and Drainage Services	47	41	41	38	-4	-8.7	-2.2
Waste Collection Treatment and Disposal Services	20	11	13	26	13	106.0	2.8
Publishing (except Internet and Music Publishing)	24	28	25	26	1	4.7	0.8
Motion Picture and Sound Recording Activities	11	8	8	8	0	0.1	-3.5
Broadcasting (except Internet)	10	7	7	8	0	1.7	-2.3
Internet Publishing and Broadcasting	0	0	0	0	0	na	na
Telecommunications Services	39	73	80	67	-12	-15.4	5.6
Internet Service Providers Web Search Portals and Data Processing Services	32	31	23	9	-14	-60.3	-12.0
Library and Other Information Services	3	7	7	6	0	-5.4	7.0
Finance	106	88	88	87	-1	-1.6	-2.0
Insurance and Superannuation Funds	14	16	13	14	1	10.0	0.4
Auxiliary Finance and Insurance Services	42	60	61	63	2	2.6	4.1
Rental and Hiring Services (except Real Estate)	45	65	68	67	-1	-1.0	4.0
Property Operators and Real Estate Services	31	39	44	38	-6	-13.7	1.9
Professional Scientific and Technical Services (exc Comp Sys Dsn & related)	185	242	250	270	20	8.0	3.9
Computer System Design and Related Services	12	17	19	17	-1	-8.0	3.5
Administrative Services	59	66	63	59	-4	-6.4	-0.1
Building Cleaning Pest Control and Other Support Services	38	41	37	38	1	3.1	0.0
Business Services	*757*	*908*	*909*	*905*	-3	-0.4	1.8
Heritage Activities	18	26	29	29	1	2.0	5.2
Artistic Activities	6	6	4	5	0	11.1	-1.5
Sport and Recreation Activities	35	45	44	44	0	0.0	2.3
Gambling Activities	13	8	8	10	1	16.4	-2.7
Arts and Recreation Services	*71*	*85*	*85*	*88*	2	2.8	2.1
Public Administration	98	135	143	136	-7	-5.0	3.3
Defence	15	1	2	2	0	-0.9	-19.9
Public Order Safety and Regulatory Services	52	82	98	91	-7	-7.5	5.7
Preschool and School Education	140	107	111	106	-5	-4.8	-2.8
Tertiary Education	99	224	213	204	-9	-4.2	7.5
Adult Community and Other Education	6	11	11	11	0	3.3	5.9
Hospitals	249	233	235	238	3	1.2	-0.5
Medical and Other Health Care Services	44	118	117	111	-5	-4.5	9.8
Residential Care Services	110	103	107	115	8	7.5	0.4
Social Assistance Services	39	72	74	63	-11	-14.7	5.0
Social Services	*853*	*1,087*	*1,111*	*1,077*	-34	-3.1	2.4
Subtotal	*3,667*	*4,169*	*4,094*	*4,065*	-28	-0.7	1.0
Owner-Occupied Dwellings and Property Operators	*651*	*764*	*766*	*777*	11	1.4	1.8
TOTAL ALL INDUSTRIES	**4,318**	**4,934**	**4,859**	**4,842**	**-18**	**-0.4**	**1.2**
Tourism sector	*127*	*181*	*196*	*225*	*29*	*14.9*	*5.9*

Activity units for Dunedin City	2002	2010	2011	2012	change 2011-2012 Number	change 2011-2012 %	Change 2002 to 2012 %pa
Agriculture	846	713	680	695	15	2.2	-1.9
Aquaculture	4	2	2	2	0	0.0	-6.7
Forestry and Logging	132	127	127	116	-11	-8.7	-1.3
Fishing Hunting and Trapping	73	46	49	47	-2	-4.1	-4.3
Agriculture Forestry and Fishing Support Services	86	95	82	93	11	13.4	0.8
Coal Mining	0	0	0	0	0	na	na
Oil and Gas Extraction	0	0	0	1	1	na	na
Metal Ore Mining	2	2	2	2	0	0.0	0.0
Non-Metallic Mineral Mining and Quarrying	5	7	7	7	0	0.0	3.4
Exploration and Other Mining Support Services	1	3	3	4	1	33.3	14.9
Primary	*1,149*	*995*	*952*	*967*	15	1.6	-1.7
Food Product Manufacturing	74	67	66	67	1	1.5	-1.0
Beverage and Tobacco Product Manufacturing	8	7	7	7	0	0.0	-1.3
Textile Leather Clothing and Footwear Manufacturing	54	41	41	38	-3	-7.3	-3.5
Wood Product Manufacturing	51	47	45	46	1	2.2	-1.0
Pulp Paper and Converted Paper Product Manufacturing	3	2	2	3	1	50.0	0.0
Printing	29	24	24	23	-1	-4.2	-2.3
Petroleum and Coal Product Manufacturing	2	2	2	2	0	0.0	0.0
Basic Chemical and Chemical Product Manufacturing	14	11	12	11	-1	-8.3	-2.4
Polymer Product and Rubber Product Manufacturing	11	12	12	12	0	0.0	0.9
Non-Metallic Mineral Product Manufacturing	20	17	16	16	0	0.0	-2.2
Primary Metal and Metal Product Manufacturing	6	7	7	6	-1	-14.3	0.0
Fabricated Metal Product Manufacturing	78	79	79	77	-2	-2.5	-0.1
Transport Equipment Manufacturing	29	39	37	35	-2	-5.4	1.9
Machinery and Equipment Manufacturing	81	78	76	78	2	2.6	-0.4
Furniture and Other Manufacturing	50	41	43	39	-4	-9.3	-2.5
Manufacturing	*510*	*474*	*469*	*460*	-9	-1.9	-1.0
Building Construction	202	367	343	347	4	1.2	5.6
Heavy and Civil Engineering Construction	28	26	27	26	-1	-3.7	-0.7
Construction Services	537	678	649	629	-20	-3.1	1.6
Construction	*767*	*1,071*	*1,019*	*1,002*	-17	-1.7	2.7
Basic Material Wholesaling	96	93	92	88	-4	-4.3	-0.9
Machinery and Equipment Wholesaling	113	121	115	115	0	0.0	0.2
Motor Vehicle and Motor Vehicle Parts Wholesaling	41	45	46	48	2	4.3	1.6
Grocery Liquor and Tobacco Product Wholesaling	61	53	49	52	3	6.1	-1.6
Other Goods Wholesaling	115	91	77	79	2	2.6	-3.7
Commission-Based Wholesaling	16	9	8	9	1	12.5	-5.6
Road Transport	218	242	233	209	-24	-10.3	-0.4
Rail Transport	2	1	1	1	0	0.0	-6.7
Water Transport	4	3	3	3	0	0.0	-2.8
Air and Space Transport	10	8	7	7	0	0.0	-3.5
Other Transport	11	10	11	10	-1	-9.1	-0.9
Postal and Courier Pick-up and Delivery Services	107	100	103	97	-6	-5.8	-1.0
Transport Support Services	32	33	34	34	0	0.0	0.6
Warehousing and Storage Services	17	12	11	9	-2	-18.2	-6.2
Wholesale and Distribution	*843*	*821*	*790*	*761*	-29	-3.7	-1.0
Motor Vehicle and Motor Vehicle Parts Retailing	80	83	86	90	4	4.7	1.2
Fuel Retailing	37	24	23	22	-1	-4.3	-5.1
Food Retailing	132	121	120	121	1	0.8	-0.9
Other Store-Based Retailing	507	547	539	545	6	1.1	0.7
Non-Store Retailing and Retail Commission Based Buying and/or Selling	31	35	37	35	-2	-5.4	1.2
Accommodation	118	139	137	138	1	0.7	1.6
Food and Beverage Services	348	417	408	421	13	3.2	1.9
Repair and Maintenance	237	228	231	233	2	0.9	-0.2
Personal and Other Services	322	348	351	350	-1	-0.3	0.8
Private Households Employing Staff	0	0	0	0	0	na	na
Retail Trade and Services	*1,812*	*1,942*	*1,932*	*1,955*	23	1.2	0.8
Electricity Supply	4	4	4	4	0	0.0	0.0
Gas Supply	1	2	2	2	0	0.0	7.2
Water Supply Sewerage and Drainage Services	2	5	5	5	0	0.0	9.6
Waste Collection Treatment and Disposal Services	14	14	16	15	-1	-6.3	0.7
Publishing (except Internet and Music Publishing)	13	22	19	20	1	5.3	4.4
Motion Picture and Sound Recording Activities	33	39	42	43	1	2.4	2.7
Broadcasting (except Internet)	12	9	9	9	0	0.0	-2.8
Internet Publishing and Broadcasting	0	0	0	0	0	na	na
Telecommunications Services	7	9	8	7	-1	-12.5	0.0
Internet Service Providers Web Search Portals and Data Processing Services	5	11	10	8	-2	-20.0	4.8
Library and Other Information Services	8	8	6	7	1	16.7	-1.3
Finance	189	583	570	580	10	1.8	11.9
Insurance and Superannuation Funds	54	31	30	32	2	6.7	-5.1
Auxiliary Finance and Insurance Services	109	139	130	123	-7	-5.4	1.2
Rental and Hiring Services (except Real Estate)	139	112	120	129	9	7.5	-0.7
Property Operators and Real Estate Services	1,193	1,955	1,929	1,945	16	0.8	5.0
Professional Scientific and Technical Services (exc Comp Sys Dsn & related)	614	788	785	800	15	1.9	2.7
Computer System Design and Related Services	69	110	114	116	2	1.8	5.3
Administrative Services	112	162	152	150	-2	-1.3	3.0
Building Cleaning Pest Control and Other Support Services	109	151	150	155	5	3.3	3.6
Business Services	*2,687*	*4,154*	*4,101*	*4,150*	49	1.2	4.4
Heritage Activities	14	18	20	21	1	5.0	4.1
Artistic Activities	59	74	70	66	-4	-5.7	1.1
Sport and Recreation Activities	180	186	181	177	-4	-2.2	-0.2
Gambling Activities	9	8	8	9	1	12.5	0.0
Arts and Recreation Services	*262*	*286*	*279*	*273*	-6	-2.2	0.4
Public Administration	66	46	45	45	0	0.0	-3.8
Defence	3	2	2	2	0	0.0	-4.0
Public Order Safety and Regulatory Services	65	73	73	69	-4	-5.5	0.6
Preschool and School Education	162	160	158	154	-4	-2.5	-0.5
Tertiary Education	21	24	26	29	3	11.5	3.3
Adult Community and Other Education	66	99	95	95	0	0.0	3.7
Hospitals	8	8	8	8	0	0.0	0.0
Medical and Other Health Care Services	385	537	536	540	4	0.7	3.4
Residential Care Services	60	55	56	56	0	0.0	-0.7
Social Assistance Services	76	93	95	92	-3	-3.2	1.9
Social Services	*912*	*1,097*	*1,094*	*1,090*	-4	-0.4	1.8
TOTAL ALL INDUSTRIES	**8,942**	**10,840**	**10,636**	**10,658**	**22**	**0.2**	**1.8**
Tourism sector	375	502	511	580	69	13.5	4.4

Table 8.11. Employment in Key Sectors, Dunedin City, 2002 to 2012

Key sectors employment (FTEs)	Year ending March				%pa change	
	2002	2010	2011	2012	2011 to 2012	2002 to 2012
Primary production	1,349	1,194	1,256	1,344	*7.0*	*0.0*
Primary processing	3,569	2,714	1,567	1,361	*-13.2*	*-9.2*
Creative	1,746	1,391	1,383	1,350	*-2.4*	*-2.5*
Education and research	3,905	7,250	7,201	6,817	*-5.3*	*5.7*
Engineering, machinery and equipment manufacturing	781	800	816	871	*6.8*	*1.1*
Key sectors (excluding Tourism)	**11,350**	**13,349**	**12,223**	**11,743**	***-3.9***	***0.3***
Non-key sectors	**33,725**	**37,919**	**38,499**	**38,650**	***0.4***	***1.4***
Total employment: Central Otago	**45,075**	**51,268**	**50,722**	**50,393**	***-0.6***	***1.1***
Tourism sector	2,154	2,748	2,979	3,523	***18.2***	***5.0***

Source: BERL Regional Database 2012

Table 8.12. GDP in Key Sectors, Dunedin City, 2002 to 2012

Key sectors GDP (2012$m)	Year ending March				%pa change	
	2002	2010	2011	2012	2011 to 2012	2002 to 2012
Primary production	124	120	120	142	*18.1*	*1.4*
Primary processing	387	371	218	196	*-10.2*	*-6.6*
Creative	61	44	44	47	*8.5*	*-2.4*
Education and research	268	370	366	350	*-4.3*	*2.7*
Engineering, machinery and equipment manufacturing	70	71	76	84	*9.9*	*1.8*
Key sectors (excluding Tourism)	**910**	**975**	**824**	**819**	***-0.6***	***-1.0***
Non-key sectors	**2,749**	**3,184**	**3,260**	**3,236**	***-0.7***	***1.6***
Total GDP: Central Otago	**3,659**	**4,159**	**4,084**	**4,056**	***-0.7***	***1.0***
Tourism sector	127	181	196	225	***14.9***	***5.9***

Source: BERL Regional Database 2012

Table 8.13. Business Units in Key Sectors, Dunedin City, 2002 to 2012

Key sectors business units	Year ending March				%pa change	
	2002	2010	2011	2012	2011 to 2012	2002 to 2012
Primary production	1,149	995	952	967	*1.6*	*-1.7*
Primary processing	136	123	120	123	*2.5*	*-1.0*
Creative	61	44	44	47	*8.5*	*-2.4*
Education and research	277	333	336	333	*-0.9*	*1.9*
Engineering, machinery and equipment manufacturing	147	166	166	170	*2.4*	*1.5*
Key sectors (excluding Tourism)	**1,770**	**1,661**	**1,618**	**1,640**	***1.4***	***-0.8***
Non-key sectors	**7,172**	**9,179**	**9,018**	**9,018**	***0.0***	***2.3***
Total business units: Central Otago	**8,942**	**10,840**	**10,636**	**10,658**	***0.2***	***1.8***
Tourism sector	375	502	511	580	***13.5***	***4.4***

Source: BERL Regional Database 2012

8.9 Detailed tables - Queenstown-Lakes District

Employment (FTEs) for Queenstown-Lakes	2002	2010	2011	2012	change 2011-2012		Change 2002 to 2012 %pa
					Number	%	
Agriculture	481	398	394	383	-11	-2.8	-2.2
Aquaculture	0	0	0	0	0	na	na
Forestry and Logging	0	0	0	0	0	na	na
Fishing Hunting and Trapping	0	0	5	5	0	0.8	na
Agriculture Forestry and Fishing Support Services	75	69	84	70	-14	-17.0	-0.7
Coal Mining	0	0	0	0	0	na	na
Oil and Gas Extraction	0	0	0	0	0	na	na
Metal Ore Mining	10	0	0	0	0	na	-100.0
Non-Metallic Mineral Mining and Quarrying	19	17	17	10	-7	-39.5	-6.4
Exploration and Other Mining Support Services	0	7	7	0	-7	-100.0	na
Primary	*585*	*490*	*506*	*468*	-38	-7.6	-2.2
Food Product Manufacturing	57	113	104	189	85	81.8	12.7
Beverage and Tobacco Product Manufacturing	101	89	74	90	16	21.2	-1.2
Textile Leather Clothing and Footwear Manufacturing	21	6	9	12	3	34.3	-5.1
Wood Product Manufacturing	53	34	32	24	-8	-25.2	-7.5
Pulp Paper and Converted Paper Product Manufacturing	0	0	0	0	0	na	na
Printing	28	50	43	38	-5	-11.0	3.3
Petroleum and Coal Product Manufacturing	0	0	0	0	0	na	na
Basic Chemical and Chemical Product Manufacturing	6	9	12	9	-3	-24.4	4.0
Polymer Product and Rubber Product Manufacturing	0	3	8	0	-8	-100.0	na
Non-Metallic Mineral Product Manufacturing	15	31	26	21	-5	-18.6	3.8
Primary Metal and Metal Product Manufacturing	3	10	10	10	0	0.8	12.0
Fabricated Metal Product Manufacturing	12	30	52	41	-10	-19.8	12.8
Transport Equipment Manufacturing	33	39	36	42	6	15.1	2.3
Machinery and Equipment Manufacturing	35	32	26	28	2	8.5	-2.0
Furniture and Other Manufacturing	21	27	27	18	-9	-32.8	-1.3
Manufacturing	*385*	*473*	*461*	*524*	64	13.8	3.1
Building Construction	487	679	593	576	-17	-2.9	1.7
Heavy and Civil Engineering Construction	68	188	155	185	30	19.3	10.6
Construction Services	567	1,287	1,176	1,125	-50	-4.3	7.1
Construction	*1,122*	*2,154*	*1,924*	*1,886*	-38	-2.0	5.3
Basic Material Wholesaling	53	27	25	31	6	25.9	-5.2
Machinery and Equipment Wholesaling	19	43	54	103	49	89.9	18.7
Motor Vehicle and Motor Vehicle Parts Wholesaling	3	10	9	9	0	0.8	10.7
Grocery Liquor and Tobacco Product Wholesaling	87	82	94	136	42	44.1	4.5
Other Goods Wholesaling	27	29	37	15	-22	-60.2	-5.9
Commission-Based Wholesaling	3	0	0	3	3	na	0.3
Road Transport	139	213	182	209	27	14.7	4.2
Rail Transport	6	0	0	0	0	na	-100.0
Water Transport	3	0	3	15	13	504.5	18.3
Air and Space Transport	149	130	110	121	11	9.9	-2.0
Other Transport	171	157	155	169	14	8.8	-0.1
Postal and Courier Pick-up and Delivery Services	38	58	77	34	-42	-55.5	-1.1
Transport Support Services	36	35	41	49	9	20.9	3.2
Warehousing and Storage Services	0	0	3	3	0	0.8	na
Wholesale and Distribution	*735*	*783*	*791*	*899*	109	13.7	2.0
Motor Vehicle and Motor Vehicle Parts Retailing	41	43	37	37	-1	-2.2	-1.0
Fuel Retailing	97	53	51	59	8	15.6	-4.9
Food Retailing	406	576	579	579	0	0.0	3.6
Other Store-Based Retailing	1,040	1,118	1,081	1,097	16	1.5	0.5
Non-Store Retailing and Retail Commission Based Buying and/or Selling	3	15	18	18	0	-2.2	20.0
Accommodation	1,589	1,853	2,029	2,117	88	4.3	2.9
Food and Beverage Services	1,158	1,669	1,713	1,768	56	3.2	4.3
Repair and Maintenance	106	159	165	171	6	3.9	5.0
Personal and Other Services	139	227	199	227	28	14.0	5.0
Private Households Employing Staff	0	0	0	0	0	na	na
Retail Trade and Services	*4,578*	*5,715*	*5,871*	*6,071*	200	3.4	2.9
Electricity Supply	0	0	0	0	0	na	na
Gas Supply	0	0	0	3	3	na	na
Water Supply Sewerage and Drainage Services	6	0	0	0	0	na	-100.0
Waste Collection Treatment and Disposal Services	37	55	60	62	2	4.0	5.2
Publishing (except Internet and Music Publishing)	38	71	76	79	3	4.1	7.7
Motion Picture and Sound Recording Activities	43	61	62	60	-2	-3.6	3.4
Broadcasting (except Internet)	25	22	20	22	2	11.9	-1.1
Internet Publishing and Broadcasting	0	0	3	0	-3	-100.0	na
Telecommunications Services	3	6	9	3	-6	-66.4	1.0
Internet Service Providers Web Search Portals and Data Processing Services	15	16	9	7	-2	-24.4	-7.8
Library and Other Information Services	6	24	23	19	-4	-16.0	11.3
Finance	112	244	205	219	14	6.8	6.9
Insurance and Superannuation Funds	3	3	6	6	0	0.8	7.5
Auxiliary Finance and Insurance Services	20	54	67	63	-5	-6.9	12.1
Rental and Hiring Services (except Real Estate)	107	187	191	274	83	43.4	9.9
Property Operators and Real Estate Services	204	260	232	256	24	10.4	2.3
Professional Scientific and Technical Services (exc Comp Sys Dsn & related)	327	709	679	711	32	4.8	8.1
Computer System Design and Related Services	6	41	56	56	0	0.8	24.1
Administrative Services	579	786	751	824	73	9.7	3.6
Building Cleaning Pest Control and Other Support Services	52	144	184	158	-26	-14.3	11.8
Business Services	*1,584*	*2,684*	*2,634*	*2,824*	190	7.2	5.9
Heritage Activities	86	90	138	127	-11	-8.1	4.0
Artistic Activities	7	22	22	14	-8	-37.5	7.9
Sport and Recreation Activities	448	799	742	779	36	4.9	5.7
Gambling Activities	89	31	42	94	52	123.9	0.5
Arts and Recreation Services	*630*	*942*	*945*	*1,013*	69	7.3	4.9
Public Administration	55	226	229	227	-2	-1.1	15.3
Defence	0	0	0	0	0	na	na
Public Order Safety and Regulatory Services	93	135	151	204	53	35.0	8.2
Preschool and School Education	229	377	463	496	33	7.0	8.1
Tertiary Education	0	60	52	72	20	38.5	na
Adult Community and Other Education	27	58	88	65	-23	-26.2	9.2
Hospitals	34	66	76	67	-9	-11.8	7.1
Medical and Other Health Care Services	53	203	207	208	2	0.8	14.7
Residential Care Services	41	59	87	83	-4	-4.1	7.3
Social Assistance Services	10	33	36	48	12	34.3	17.2
Social Services	*541*	*1,216*	*1,390*	*1,471*	81	5.8	10.5
TOTAL ALL INDUSTRIES	**10,160**	**14,457**	**14,521**	**15,157**	**636**	**4.4**	**4.1**
Tourism sector	*3,677*	*4,549*	*4,780*	*5,171*	*391*	*8.2*	*3.5*

Real value added (GDP 2012$m) for Queenstown-Lakes	2002	2010	2011	2012	change 2011-2012 Number	change 2011-2012 %	Change 2002 to 2012 %pa
Agriculture	28	26	22	29	6	28.0	0.1
Aquaculture	0	0	0	0	0	na	na
Forestry and Logging	0	0	0	0	0	na	na
Fishing Hunting and Trapping	0	0	3	3	0	7.4	na
Agriculture Forestry and Fishing Support Services	4	4	5	5	0	9.2	1.7
Coal Mining	0	0	0	0	0	na	na
Oil and Gas Extraction	0	0	0	0	0	na	na
Metal Ore Mining	2	0	0	0	0	na	-100.0
Non-Metallic Mineral Mining and Quarrying	4	2	1	1	-1	-52.6	-16.4
Exploration and Other Mining Support Services	0	1	1	0	-1	-100.0	na
Primary	*39*	*32*	*32*	*38*	6	17.4	-0.3
Food Product Manufacturing	6	15	14	25	12	84.6	15.3
Beverage and Tobacco Product Manufacturing	11	12	10	12	2	23.1	1.1
Textile Leather Clothing and Footwear Manufacturing	1	1	1	1	0	28.3	-1.7
Wood Product Manufacturing	7	6	5	4	-1	-22.4	-4.4
Pulp Paper and Converted Paper Product Manufacturing	0	0	0	0	0	na	na
Printing	1	2	2	2	0	2.7	6.1
Petroleum and Coal Product Manufacturing	0	0	0	0	0	na	na
Basic Chemical and Chemical Product Manufacturing	1	2	3	2	-1	-27.2	4.3
Polymer Product and Rubber Product Manufacturing	0	1	2	0	-2	-100.0	na
Non-Metallic Mineral Product Manufacturing	2	5	4	3	-1	-19.6	4.1
Primary Metal and Metal Product Manufacturing	0	1	1	1	0	2.4	10.4
Fabricated Metal Product Manufacturing	2	3	5	4	-1	-18.5	11.2
Transport Equipment Manufacturing	3	3	4	4	1	20.6	4.4
Machinery and Equipment Manufacturing	3	3	3	3	0	13.6	0.0
Furniture and Other Manufacturing	1	2	2	1	-1	-32.8	-0.5
Manufacturing	*39*	*56*	*56*	*64*	9	15.3	5.2
Building Construction	33	41	38	34	-4	-10.4	0.4
Heavy and Civil Engineering Construction	5	11	10	11	1	10.2	9.2
Construction Services	38	79	76	67	-9	-11.6	5.7
Construction	*76*	*131*	*124*	*112*	-12	-9.5	4.0
Basic Material Wholesaling	6	3	3	4	1	27.5	-5.1
Machinery and Equipment Wholesaling	2	5	6	12	6	92.2	18.8
Motor Vehicle and Motor Vehicle Parts Wholesaling	0	1	1	1	0	2.0	10.8
Grocery Liquor and Tobacco Product Wholesaling	10	9	11	16	5	45.9	4.6
Other Goods Wholesaling	3	3	4	2	-3	-59.7	-5.8
Commission-Based Wholesaling	0	0	0	0	0	na	0.4
Road Transport	17	30	27	30	3	12.4	5.9
Rail Transport	1	0	0	0	0	na	-100.0
Water Transport	0	0	0	2	2	492.2	20.2
Air and Space Transport	18	18	16	17	1	7.7	-0.5
Other Transport	21	22	23	24	1	6.6	1.5
Postal and Courier Pick-up and Delivery Services	5	8	11	5	-6	-56.4	0.5
Transport Support Services	4	5	6	7	1	18.4	4.9
Warehousing and Storage Services	0	0	0	0	0	-1.3	na
Wholesale and Distribution	*89*	*105*	*109*	*122*	12	11.2	3.2
Motor Vehicle and Motor Vehicle Parts Retailing	2	3	2	3	0	4.6	3.6
Fuel Retailing	4	4	3	4	1	23.7	-0.4
Food Retailing	18	39	39	41	3	7.0	8.4
Other Store-Based Retailing	47	75	72	78	6	8.6	5.2
Non-Store Retailing and Retail Commission Based Buying and/or Selling	0	1	1	1	0	4.6	25.7
Accommodation	51	60	66	70	3	4.9	3.1
Food and Beverage Services	37	54	56	58	2	3.9	4.5
Repair and Maintenance	6	8	8	8	0	3.3	2.9
Personal and Other Services	8	11	10	11	1	13.3	3.0
Private Households Employing Staff	0	0	0	0	0	na	na
Retail Trade and Services	*175*	*254*	*258*	*275*	17	6.5	4.6
Electricity Supply	0	0	0	0	0	na	na
Gas Supply	0	0	0	1	1	na	na
Water Supply Sewerage and Drainage Services	3	0	0	0	0	na	-100.0
Waste Collection Treatment and Disposal Services	15	22	22	22	0	-0.8	3.6
Publishing (except Internet and Music Publishing)	1	3	3	4	1	20.1	10.6
Motion Picture and Sound Recording Activities	3	4	4	4	0	-5.7	2.4
Broadcasting (except Internet)	2	2	1	2	0	9.5	-2.1
Internet Publishing and Broadcasting	0	0	0	0	0	-100.0	na
Telecommunications Services	2	7	10	3	-7	-69.1	2.8
Internet Service Providers Web Search Portals and Data Processing Services	13	17	10	7	-3	-30.6	-6.2
Library and Other Information Services	0	1	1	1	0	-16.5	9.2
Finance	15	41	33	35	2	5.9	9.1
Insurance and Superannuation Funds	0	0	1	1	0	-0.1	9.6
Auxiliary Finance and Insurance Services	3	9	11	10	-1	-7.7	14.4
Rental and Hiring Services (except Real Estate)	25	48	49	70	21	43.4	10.8
Property Operators and Real Estate Services	21	29	25	28	3	10.6	3.2
Professional Scientific and Technical Services (exc Comp Sys Dsn & related)	34	65	62	66	4	6.3	7.0
Computer System Design and Related Services	1	4	5	5	0	2.2	22.9
Administrative Services	25	37	34	38	4	11.6	4.2
Building Cleaning Pest Control and Other Support Services	2	7	8	7	-1	-12.8	12.5
Business Services	*165*	*297*	*282*	*304*	23	8.1	6.3
Heritage Activities	7	6	10	9	-1	-10.1	2.9
Artistic Activities	1	1	2	1	-1	-38.9	6.9
Sport and Recreation Activities	35	55	53	55	1	2.6	4.6
Gambling Activities	5	2	2	5	2	122.6	-1.4
Arts and Recreation Services	*47*	*64*	*67*	*69*	2	3.3	3.9
Public Administration	4	21	22	21	-1	-3.4	17.4
Defence	0	0	0	0	0	na	na
Public Order Safety and Regulatory Services	6	10	11	15	4	32.9	10.2
Preschool and School Education	15	19	23	24	2	8.2	4.9
Tertiary Education	0	3	3	4	1	40.1	na
Adult Community and Other Education	2	3	4	3	-1	-25.3	6.0
Hospitals	3	5	6	5	-1	-15.0	4.9
Medical and Other Health Care Services	5	16	16	16	0	-2.9	12.4
Residential Care Services	4	5	7	6	-1	-7.6	5.1
Social Assistance Services	1	2	2	2	1	33.5	15.0
Social Services	*39*	*83*	*94*	*97*	3	3.6	9.4
Subtotal	*669*	*1,021*	*1,022*	*1,082*	60	5.9	4.9
Owner-Occupied Dwellings and Property Operators	*102*	*167*	*171*	*175*	4	2.4	5.6
TOTAL ALL INDUSTRIES	**771**	**1,189**	**1,193**	**1,257**	**64**	**5.4**	**5.0**
Tourism sector	*161*	*235*	*248*	*266*	*18*	*7.2*	*5.1*

Activity units for Queenstown-Lakes	2002	2010	2011	2012	change 2011-2012 Number	change 2011-2012 %	Change 2002 to 2012 %pa
Agriculture	269	239	235	236	1	0.4	-1.3
Aquaculture	0	1	1	2	1	100.0	na
Forestry and Logging	15	17	18	21	3	16.7	3.4
Fishing Hunting and Trapping	2	11	9	11	2	22.2	18.6
Agriculture Forestry and Fishing Support Services	32	45	47	49	2	4.3	4.4
Coal Mining	0	0	0	0	0	na	na
Oil and Gas Extraction	0	0	0	0	0	na	na
Metal Ore Mining	5	3	2	2	0	0.0	-8.8
Non-Metallic Mineral Mining and Quarrying	4	9	8	8	0	0.0	7.2
Exploration and Other Mining Support Services	0	1	3	4	1	33.3	na
Primary	*327*	*326*	*323*	*333*	10	3.1	0.2
Food Product Manufacturing	11	15	17	22	5	29.4	7.2
Beverage and Tobacco Product Manufacturing	9	16	15	16	1	6.7	5.9
Textile Leather Clothing and Footwear Manufacturing	15	11	12	12	0	0.0	-2.2
Wood Product Manufacturing	21	17	14	15	1	7.1	-3.3
Pulp Paper and Converted Paper Product Manufacturing	0	0	0	0	0	na	na
Printing	7	12	12	11	-1	-8.3	4.6
Petroleum and Coal Product Manufacturing	0	0	0	0	0	na	na
Basic Chemical and Chemical Product Manufacturing	2	2	1	2	1	100.0	0.0
Polymer Product and Rubber Product Manufacturing	1	3	5	3	-2	-40.0	11.6
Non-Metallic Mineral Product Manufacturing	7	12	8	8	0	0.0	1.3
Primary Metal and Metal Product Manufacturing	1	4	4	5	1	25.0	17.5
Fabricated Metal Product Manufacturing	4	12	12	14	2	16.7	13.3
Transport Equipment Manufacturing	13	20	19	19	0	0.0	3.9
Machinery and Equipment Manufacturing	19	19	20	20	0	0.0	0.5
Furniture and Other Manufacturing	13	20	20	16	-4	-20.0	2.1
Manufacturing	*123*	*163*	*159*	*163*	4	2.5	2.9
Building Construction	207	469	448	435	-13	-2.9	7.7
Heavy and Civil Engineering Construction	15	21	20	24	4	20.0	4.8
Construction Services	274	569	569	557	-12	-2.1	7.4
Construction	*496*	*1,059*	*1,037*	*1,016*	-21	-2.0	7.4
Basic Material Wholesaling	10	18	21	21	0	0.0	7.7
Machinery and Equipment Wholesaling	13	17	19	19	0	0.0	3.9
Motor Vehicle and Motor Vehicle Parts Wholesaling	3	7	5	4	-1	-20.0	2.9
Grocery Liquor and Tobacco Product Wholesaling	21	23	23	26	3	13.0	2.2
Other Goods Wholesaling	17	29	28	31	3	10.7	6.2
Commission-Based Wholesaling	5	2	2	3	1	50.0	-5.0
Road Transport	63	87	84	98	14	16.7	4.5
Rail Transport	1	0	0	0	0	na	-100.0
Water Transport	1	4	3	2	-1	-33.3	7.2
Air and Space Transport	23	33	26	25	-1	-3.8	0.8
Other Transport	31	34	39	42	3	7.7	3.1
Postal and Courier Pick-up and Delivery Services	16	24	27	25	-2	-7.4	4.6
Transport Support Services	6	14	10	9	-1	-10.0	4.1
Warehousing and Storage Services	3	4	4	4	0	0.0	2.9
Wholesale and Distribution	*213*	*296*	*291*	*309*	18	6.2	3.8
Motor Vehicle and Motor Vehicle Parts Retailing	8	10	13	11	-2	-15.4	3.2
Fuel Retailing	10	10	10	9	-1	-10.0	-1.0
Food Retailing	29	50	52	54	2	3.8	6.4
Other Store-Based Retailing	205	307	317	322	5	1.6	4.6
Non-Store Retailing and Retail Commission Based Buying and/or Selling	8	14	15	16	1	6.7	7.2
Accommodation	217	278	266	264	-2	-0.8	2.0
Food and Beverage Services	165	233	247	245	-2	-0.8	4.0
Repair and Maintenance	47	76	81	78	-3	-3.7	5.2
Personal and Other Services	68	93	91	90	-1	-1.1	2.8
Private Households Employing Staff	0	0	0	0	0	na	na
Retail Trade and Services	*757*	*1,071*	*1,092*	*1,089*	-3	-0.3	3.7
Electricity Supply	1	3	2	3	1	50.0	11.6
Gas Supply	0	0	0	1	1	na	na
Water Supply Sewerage and Drainage Services	6	3	4	4	0	0.0	-4.0
Waste Collection Treatment and Disposal Services	9	12	9	11	2	22.2	2.0
Publishing (except Internet and Music Publishing)	9	12	13	14	1	7.7	4.5
Motion Picture and Sound Recording Activities	40	66	71	64	-7	-9.9	4.8
Broadcasting (except Internet)	6	3	4	4	0	0.0	-4.0
Internet Publishing and Broadcasting	0	1	3	2	-1	-33.3	na
Telecommunications Services	3	2	3	3	0	0.0	0.0
Internet Service Providers Web Search Portals and Data Processing Services	3	8	9	10	1	11.1	12.8
Library and Other Information Services	5	6	6	7	1	16.7	3.4
Finance	52	358	365	397	32	8.8	22.5
Insurance and Superannuation Funds	3	3	4	4	0	0.0	2.9
Auxiliary Finance and Insurance Services	17	52	50	58	8	16.0	13.1
Rental and Hiring Services (except Real Estate)	77	102	116	112	-4	-3.4	3.8
Property Operators and Real Estate Services	600	1,372	1,400	1,408	8	0.6	8.9
Professional Scientific and Technical Services (exc Comp Sys Dsn & related)	225	467	463	497	34	7.3	8.2
Computer System Design and Related Services	9	47	52	63	11	21.2	21.5
Administrative Services	106	179	177	187	10	5.6	5.8
Building Cleaning Pest Control and Other Support Services	30	73	75	75	0	0.0	9.6
Business Services	*1,201*	*2,769*	*2,826*	*2,924*	98	3.5	9.3
Heritage Activities	14	13	14	14	0	0.0	0.0
Artistic Activities	25	41	38	37	-1	-2.6	4.0
Sport and Recreation Activities	108	166	164	169	5	3.0	4.6
Gambling Activities	4	2	2	3	1	50.0	-2.8
Arts and Recreation Services	*151*	*222*	*218*	*223*	5	2.3	4.0
Public Administration	9	9	9	10	1	11.1	1.1
Defence	0	0	0	0	0	na	na
Public Order Safety and Regulatory Services	18	24	24	23	-1	-4.2	2.5
Preschool and School Education	22	27	29	31	2	6.9	3.5
Tertiary Education	0	8	6	10	4	66.7	na
Adult Community and Other Education	19	37	41	35	-6	-14.6	6.3
Hospitals	1	1	1	1	0	0.0	0.0
Medical and Other Health Care Services	75	114	119	128	9	7.6	5.5
Residential Care Services	2	4	5	5	0	0.0	9.6
Social Assistance Services	8	12	10	16	6	60.0	7.2
Social Services	*154*	*236*	*244*	*259*	15	6.1	5.3
TOTAL ALL INDUSTRIES	**3,422**	**6,142**	**6,190**	**6,316**	**126**	**2.0**	**6.3**
Tourism sector	572	812	824	883	60	7.2	4.4

Table 8.14. Employment in Key Sectors, Queenstown-Lakes District, 2002 to 2012

Key sectors employment (FTEs)	Year ending March				%pa change	
	2002	2010	2011	2012	2011 to 2012	2002 to 2012
Primary production	585	490	506	468	*-7.6*	*-2.2*
Primary processing	211	236	211	304	*44.0*	*3.7*
Creative	262	383	365	380	*4.0*	*3.8*
Education and research	254	497	608	643	*5.8*	*9.7*
Engineering, machinery and equipment manufacturing	58	119	113	121	*6.8*	*7.6*
Key sectors (excluding Tourism)	**1,371**	**1,724**	**1,803**	**1,915**	***6.2***	***3.4***
Non-key sectors	**8,790**	**12,733**	**12,717**	**13,241**	***4.1***	***4.2***
Total employment: Queenstown-Lakes	**10,160**	**14,457**	**14,521**	**15,157**	***4.4***	***4.1***
Tourism sector	3,677	4,549	4,780	5,171	***8.2***	***3.5***

Source: BERL Regional Database 2012

Table 8.15. GDP in Key Sectors, Queenstown-Lakes District, 2002 to 2012

Key sectors GDP (2012$m)	Year ending March				%pa change	
	2002	2010	2011	2012	2011 to 2012	2002 to 2012
Primary production	39	32	32	38	*17.4*	*-0.3*
Primary processing	23	32	29	42	*43.6*	*5.9*
Creative	14	16	15	16	*12.2*	*1.6*
Education and research	17	25	30	32	*7.8*	*6.6*
Engineering, machinery and equipment manufacturing	5	11	10	12	*10.3*	*8.3*
Key sectors (excluding Tourism)	**99**	**116**	**116**	**140**	***20.2***	***3.5***
Non-key sectors	**569**	**903**	**903**	**940**	***4.0***	***5.1***
Total GDP: Queenstown-Lakes	**668**	**1,019**	**1,019**	**1,079**	***5.9***	***4.9***
Tourism sector	161	235	248	266	***7.2***	***5.1***

Source: BERL Regional Database 2012

Table 8.16. Business Units in Key Sectors, Queenstown-Lakes District, 2002 to 2012

Key sectors business units	Year ending March				%pa change	
	2002	2010	2011	2012	2011 to 2012	2002 to 2012
Primary production	327	326	323	333	*3.1*	*0.2*
Primary processing	41	48	46	53	*15.2*	*2.6*
Creative	14	16	15	16	*12.2*	*1.6*
Education and research	49	70	70	72	*2.9*	*3.9*
Engineering, machinery and equipment manufacturing	39	73	74	79	*6.8*	*7.3*
Key sectors (excluding Tourism)	**470**	**533**	**528**		***-100.0***	***-100.0***
Non-key sectors	**2,952**	**5,609**	**5,662**		***-100.0***	***-100.0***
Total business units: Queenstown-Lakes	**3,422**	**6,142**	**6,190**	**6,316**	***2.0***	***6.3***
Tourism sector	572	812	824	883	***7.2***	***4.4***

Source: BERL Regional Database 2012

8.10 Detailed tables - Waitaki District

Employment (FTEs) for Waitaki	2002	2010	2011	2012	change 2011-2012		Change 2002 to 2012 %pa
					Number	%	
Agriculture	1,350	1,399	1,505	1,657	152	10.1	2.1
Aquaculture	0	0	10	10	0	0.8	na
Forestry and Logging	0	6	6	3	-3	-49.6	na
Fishing Hunting and Trapping	16	8	7	7	0	0.8	-7.3
Agriculture Forestry and Fishing Support Services	168	207	201	211	9	4.7	2.3
Coal Mining	0	0	0	0	0	na	na
Oil and Gas Extraction	0	0	0	0	0	na	na
Metal Ore Mining	141	385	520	513	-7	-1.4	13.8
Non-Metallic Mineral Mining and Quarrying	60	39	39	39	0	0.8	-4.1
Exploration and Other Mining Support Services	0	0	0	0	0	na	na
Primary	*1,734*	*2,044*	*2,289*	*2,441*	152	6.6	3.5
Food Product Manufacturing	1,319	1,542	1,475	1,767	292	19.8	3.0
Beverage and Tobacco Product Manufacturing	0	6	3	0	-3	-100.0	na
Textile Leather Clothing and Footwear Manufacturing	431	272	292	284	-8	-2.7	-4.1
Wood Product Manufacturing	84	80	76	68	-8	-10.3	-2.0
Pulp Paper and Converted Paper Product Manufacturing	0	0	0	0	0	na	na
Printing	11	12	12	9	-3	-24.4	-2.0
Petroleum and Coal Product Manufacturing	0	0	0	0	0	na	na
Basic Chemical and Chemical Product Manufacturing	9	9	12	12	0	0.8	2.8
Polymer Product and Rubber Product Manufacturing	3	0	0	0	0	na	-100.0
Non-Metallic Mineral Product Manufacturing	9	32	24	18	-6	-24.4	7.5
Primary Metal and Metal Product Manufacturing	65	0	0	0	0	na	-100.0
Fabricated Metal Product Manufacturing	28	60	57	59	3	4.5	7.8
Transport Equipment Manufacturing	21	19	16	19	3	20.9	-1.2
Machinery and Equipment Manufacturing	61	83	65	63	-2	-2.4	0.3
Furniture and Other Manufacturing	28	25	18	15	-3	-16.0	-5.9
Manufacturing	*2,070*	*2,139*	*2,049*	*2,315*	266	13.0	1.1
Building Construction	125	187	180	133	-47	-26.2	0.6
Heavy and Civil Engineering Construction	217	285	288	257	-32	-11.0	1.7
Construction Services	374	410	408	370	-38	-9.3	-0.1
Construction	*716*	*883*	*876*	*760*	-117	-13.3	0.6
Basic Material Wholesaling	67	122	115	140	25	21.8	7.6
Machinery and Equipment Wholesaling	22	42	52	60	8	14.9	10.7
Motor Vehicle and Motor Vehicle Parts Wholesaling	0	0	3	3	0	0.8	na
Grocery Liquor and Tobacco Product Wholesaling	28	68	66	55	-11	-16.3	7.1
Other Goods Wholesaling	12	39	53	39	-14	-26.7	12.6
Commission-Based Wholesaling	22	7	10	10	0	0.8	-7.4
Road Transport	145	178	167	164	-3	-1.7	1.3
Rail Transport	6	3	3	3	0	0.8	-6.4
Water Transport	0	0	0	0	0	na	na
Air and Space Transport	3	0	0	0	0	na	-100.0
Other Transport	9	14	2	2	0	0.8	-13.2
Postal and Courier Pick-up and Delivery Services	36	46	49	42	-7	-13.9	1.5
Transport Support Services	0	0	0	0	0	na	na
Warehousing and Storage Services	0	13	0	0	0	na	na
Wholesale and Distribution	*350*	*533*	*520*	*519*	-2	-0.3	4.0
Motor Vehicle and Motor Vehicle Parts Retailing	74	85	84	90	6	7.4	2.1
Fuel Retailing	92	57	79	63	-15	-19.5	-3.6
Food Retailing	389	309	352	335	-17	-4.9	-1.5
Other Store-Based Retailing	408	370	360	344	-16	-4.3	-1.7
Non-Store Retailing and Retail Commission Based Buying and/or Selling	14	7	9	8	0	-2.2	-5.0
Accommodation	159	204	208	185	-23	-10.9	1.5
Food and Beverage Services	338	357	351	356	5	1.4	0.5
Repair and Maintenance	77	118	128	123	-5	-4.1	4.8
Personal and Other Services	66	62	58	67	8	14.3	0.0
Private Households Employing Staff	0	0	0	0	0	na	na
Retail Trade and Services	*1,616*	*1,568*	*1,628*	*1,572*	-57	-3.5	-0.3
Electricity Supply	0	60	54	76	23	42.6	na
Gas Supply	0	0	0	0	0	na	na
Water Supply Sewerage and Drainage Services	0	0	0	0	0	na	na
Waste Collection Treatment and Disposal Services	3	8	9	9	0	0.8	12.3
Publishing (except Internet and Music Publishing)	60	78	94	95	1	0.8	4.7
Motion Picture and Sound Recording Activities	3	10	8	8	0	0.8	12.1
Broadcasting (except Internet)	13	10	13	13	0	0.8	0.3
Internet Publishing and Broadcasting	0	0	0	0	0	na	na
Telecommunications Services	3	0	0	0	0	na	-100.0
Internet Service Providers Web Search Portals and Data Processing Services	0	0	0	0	0	na	na
Library and Other Information Services	9	14	15	15	0	0.8	5.3
Finance	65	65	58	56	-3	-4.5	-1.6
Insurance and Superannuation Funds	6	9	9	12	3	34.3	7.5
Auxiliary Finance and Insurance Services	11	18	12	12	0	0.8	0.8
Rental and Hiring Services (except Real Estate)	31	50	40	65	24	60.3	7.6
Property Operators and Real Estate Services	49	63	53	49	-4	-7.6	0.1
Professional Scientific and Technical Services (exc Comp Sys Dsn & related)	171	296	304	272	-32	-10.5	4.8
Computer System Design and Related Services	3	0	0	0	0	na	-100.0
Administrative Services	126	85	90	81	-9	-9.5	-4.2
Building Cleaning Pest Control and Other Support Services	23	20	21	21	-1	-3.0	-1.0
Business Services	*574*	*786*	*781*	*784*	4	0.5	3.2
Heritage Activities	8	11	17	14	-3	-16.0	5.7
Artistic Activities	0	5	2	2	0	0.8	na
Sport and Recreation Activities	67	85	89	95	6	7.3	3.5
Gambling Activities	0	0	0	0	0	na	na
Arts and Recreation Services	*75*	*100*	*108*	*112*	4	3.5	4.0
Public Administration	60	106	99	96	-2	-2.4	4.9
Defence	0	3	7	0	-7	-100.0	na
Public Order Safety and Regulatory Services	123	100	121	113	-8	-6.3	-0.8
Preschool and School Education	477	488	494	494	0	0.0	0.3
Tertiary Education	4	16	11	14	3	25.9	12.5
Adult Community and Other Education	6	32	34	15	-19	-55.2	9.0
Hospitals	110	141	153	154	1	0.8	3.4
Medical and Other Health Care Services	87	222	209	185	-25	-11.7	7.8
Residential Care Services	217	274	249	276	27	11.0	2.4
Social Assistance Services	28	81	214	215	2	0.8	22.4
Social Services	*1,114*	*1,464*	*1,589*	*1,563*	-27	-1.7	3.4
TOTAL ALL INDUSTRIES	**8,250**	**9,516**	**9,841**	**10,065**	**223**	**2.3**	**2.0**
Tourism sector	*594*	*746*	*736*	*719*	*-17*	*-2.3*	*1.9*

Real value added (GDP 2012$m) for Waitaki	2002	2010	2011	2012	change 2011-2012		Change 2002 to 2012 %pa
					Number	%	
Agriculture	80	91	86	124	39	44.9	4.5
Aquaculture	0	0	6	7	0	7.4	na
Forestry and Logging	0	3	3	1	-1	-48.6	na
Fishing Hunting and Trapping	9	5	5	5	0	7.4	-5.7
Agriculture Forestry and Fishing Support Services	10	13	11	16	4	37.8	4.8
Coal Mining	0	0	0	0	0	na	na
Oil and Gas Extraction	0	0	0	0	0	na	na
Metal Ore Mining	30	35	45	35	-10	-22.7	1.7
Non-Metallic Mineral Mining and Quarrying	13	4	3	3	-1	-21.0	-14.4
Exploration and Other Mining Support Services	0	0	0	0	0	na	na
Primary	*141*	*150*	*159*	*191*	31	19.7	3.1
Food Product Manufacturing	140	204	194	236	42	21.7	5.4
Beverage and Tobacco Product Manufacturing	0	1	0	0	0	-100.0	na
Textile Leather Clothing and Footwear Manufacturing	26	27	26	24	-2	-7.1	-0.6
Wood Product Manufacturing	11	13	13	12	-1	-6.9	1.2
Pulp Paper and Converted Paper Product Manufacturing	0	0	0	0	0	na	na
Printing	0	1	0	0	0	-12.9	0.6
Petroleum and Coal Product Manufacturing	0	0	0	0	0	na	na
Basic Chemical and Chemical Product Manufacturing	2	2	3	3	0	-3.0	3.1
Polymer Product and Rubber Product Manufacturing	1	0	0	0	0	na	-100.0
Non-Metallic Mineral Product Manufacturing	1	5	4	3	-1	-25.3	7.8
Primary Metal and Metal Product Manufacturing	8	0	0	0	0	na	-100.0
Fabricated Metal Product Manufacturing	3	6	6	6	0	6.2	6.4
Transport Equipment Manufacturing	2	2	2	2	0	26.6	0.9
Machinery and Equipment Manufacturing	5	7	6	7	0	2.2	2.3
Furniture and Other Manufacturing	2	2	1	1	0	-16.0	-5.1
Manufacturing	*202*	*270*	*256*	*295*	39	15.0	3.9
Building Construction	8	11	12	8	-4	-31.9	-0.7
Heavy and Civil Engineering Construction	15	17	19	15	-3	-17.8	0.4
Construction Services	25	25	26	22	-4	-16.2	-1.4
Construction	*48*	*54*	*56*	*45*	-11	-20.0	-0.7
Basic Material Wholesaling	8	14	13	17	3	23.3	7.7
Machinery and Equipment Wholesaling	3	5	6	7	1	16.3	10.9
Motor Vehicle and Motor Vehicle Parts Wholesaling	0	0	0	0	0	2.0	na
Grocery Liquor and Tobacco Product Wholesaling	3	8	8	7	-1	-15.3	7.2
Other Goods Wholesaling	1	4	6	5	-2	-25.8	12.7
Commission-Based Wholesaling	3	1	1	1	0	2.0	-7.3
Road Transport	18	25	24	24	-1	-3.7	2.9
Rail Transport	1	0	0	0	0	-1.3	-4.9
Water Transport	0	0	0	0	0	na	na
Air and Space Transport	0	0	0	0	0	na	-100.0
Other Transport	1	2	0	0	0	-1.3	-11.8
Postal and Courier Pick-up and Delivery Services	4	7	7	6	-1	-15.7	3.2
Transport Support Services	0	0	0	0	0	na	na
Warehousing and Storage Services	0	2	0	0	0	na	na
Wholesale and Distribution	*42*	*67*	*67*	*67*	-1	-1.0	4.7
Motor Vehicle and Motor Vehicle Parts Retailing	3	6	6	6	1	15.0	6.8
Fuel Retailing	4	4	5	5	-1	-13.8	0.9
Food Retailing	18	21	24	24	0	1.7	3.1
Other Store-Based Retailing	18	25	24	25	1	2.4	2.9
Non-Store Retailing and Retail Commission Based Buying and/or Selling	1	0	1	1	0	4.6	-0.6
Accommodation	5	7	7	6	-1	-10.3	1.7
Food and Beverage Services	11	11	12	12	0	2.0	0.7
Repair and Maintenance	4	6	6	6	0	-4.6	2.8
Personal and Other Services	4	3	3	3	0	13.6	-1.9
Private Households Employing Staff	0	0	0	0	0	na	na
Retail Trade and Services	*69*	*83*	*86*	*87*	1	0.9	2.4
Electricity Supply	0	24	20	27	7	36.1	na
Gas Supply	0	0	0	0	0	na	na
Water Supply Sewerage and Drainage Services	0	0	0	0	0	na	na
Waste Collection Treatment and Disposal Services	1	3	3	3	0	-3.9	10.6
Publishing (except Internet and Music Publishing)	2	4	4	5	1	16.2	7.5
Motion Picture and Sound Recording Activities	0	1	1	1	0	-1.5	11.0
Broadcasting (except Internet)	1	1	1	1	0	-1.5	-0.7
Internet Publishing and Broadcasting	0	0	0	0	0	na	na
Telecommunications Services	2	0	0	0	0	na	-100.0
Internet Service Providers Web Search Portals and Data Processing Services	0	0	0	0	0	na	na
Library and Other Information Services	1	1	1	1	0	0.2	3.3
Finance	9	11	9	9	-1	-5.4	0.4
Insurance and Superannuation Funds	1	1	1	2	0	33.2	9.6
Auxiliary Finance and Insurance Services	2	3	2	2	0	-0.1	2.8
Rental and Hiring Services (except Real Estate)	7	13	10	17	6	60.3	8.5
Property Operators and Real Estate Services	5	7	6	5	0	-7.5	0.9
Professional Scientific and Technical Services (exc Comp Sys Dsn & related)	17	27	28	25	-3	-9.1	3.7
Computer System Design and Related Services	0	0	0	0	0	na	-100.0
Administrative Services	5	4	4	4	0	-8.0	-3.6
Building Cleaning Pest Control and Other Support Services	1	1	1	1	0	-1.4	-0.4
Business Services	*55*	*100*	*91*	*102*	11	11.6	6.4
Heritage Activities	1	1	1	1	0	-17.9	4.7
Artistic Activities	0	0	0	0	0	-1.5	na
Sport and Recreation Activities	5	6	6	7	0	4.9	2.5
Gambling Activities	0	0	0	0	0	na	na
Arts and Recreation Services	*6*	*7*	*8*	*8*	0	1.2	3.0
Public Administration	5	10	9	9	0	-4.7	6.9
Defence	0	0	0	0	0	-100.0	na
Public Order Safety and Regulatory Services	7	7	9	8	-1	-7.8	1.0
Preschool and School Education	32	24	24	24	0	1.2	-2.6
Tertiary Education	0	1	1	1	0	27.4	9.1
Adult Community and Other Education	0	2	2	1	-1	-54.7	5.8
Hospitals	10	11	12	12	0	-2.9	1.3
Medical and Other Health Care Services	8	18	17	14	-2	-15.0	5.6
Residential Care Services	20	22	20	21	1	7.0	0.3
Social Assistance Services	2	4	10	10	0	0.2	20.0
Social Services	*85*	*98*	*104*	*100*	-4	-3.4	1.6
Subtotal	*648*	*829*	*829*	*895*	66	7.9	3.3
Owner-Occupied Dwellings and Property Operators	*112*	*128*	*128*	*129*	1	0.7	1.4
TOTAL ALL INDUSTRIES	**759**	**957**	**957**	**1,024**	**67**	**7.0**	**3.0**
Tourism sector	*29*	*44*	*43*	*42*	*0*	*-0.5*	*3.8*

Activity units for Waitaki	2002	2010	2011	2012	change 2011-2012		Change 2002 to 2012 %pa
					Number	%	
Agriculture	933	880	865	896	31	3.6	-0.4
Aquaculture	2	1	2	2	0	0.0	0.0
Forestry and Logging	69	49	53	54	1	1.9	-2.4
Fishing Hunting and Trapping	28	13	11	10	-1	-9.1	-9.8
Agriculture Forestry and Fishing Support Services	62	79	71	71	0	0.0	1.4
Coal Mining	0	1	0	0	0	na	na
Oil and Gas Extraction	0	0	0	0	0	na	na
Metal Ore Mining	1	1	1	1	0	0.0	0.0
Non-Metallic Mineral Mining and Quarrying	6	4	4	5	1	25.0	-1.8
Exploration and Other Mining Support Services	1	0	0	0	0	na	-100.0
Primary	*1,102*	*1,028*	*1,007*	*1,039*	32	3.2	-0.6
Food Product Manufacturing	18	14	15	15	0	0.0	-1.8
Beverage and Tobacco Product Manufacturing	0	2	4	2	-2	-50.0	na
Textile Leather Clothing and Footwear Manufacturing	10	7	6	5	-1	-16.7	-6.7
Wood Product Manufacturing	11	16	17	15	-2	-11.8	3.2
Pulp Paper and Converted Paper Product Manufacturing	1	0	0	0	0	na	-100.0
Printing	2	2	3	3	0	0.0	4.1
Petroleum and Coal Product Manufacturing	0	0	0	0	0	na	na
Basic Chemical and Chemical Product Manufacturing	1	3	4	4	0	0.0	14.9
Polymer Product and Rubber Product Manufacturing	1	0	0	0	0	na	-100.0
Non-Metallic Mineral Product Manufacturing	9	9	11	11	0	0.0	2.0
Primary Metal and Metal Product Manufacturing	1	2	1	1	0	0.0	0.0
Fabricated Metal Product Manufacturing	9	9	11	11	0	0.0	2.0
Transport Equipment Manufacturing	3	3	4	5	1	25.0	5.2
Machinery and Equipment Manufacturing	7	15	15	15	0	0.0	7.9
Furniture and Other Manufacturing	3	7	7	6	-1	-14.3	7.2
Manufacturing	*76*	*89*	*98*	*93*	-5	-5.1	2.0
Building Construction	41	76	72	62	-10	-13.9	4.2
Heavy and Civil Engineering Construction	13	17	14	16	2	14.3	2.1
Construction Services	100	149	153	157	4	2.6	4.6
Construction	*154*	*242*	*239*	*235*	-4	-1.7	4.3
Basic Material Wholesaling	16	28	28	29	1	3.6	6.1
Machinery and Equipment Wholesaling	7	11	11	13	2	18.2	6.4
Motor Vehicle and Motor Vehicle Parts Wholesaling	2	1	1	1	0	0.0	-6.7
Grocery Liquor and Tobacco Product Wholesaling	9	8	7	8	1	14.3	-1.2
Other Goods Wholesaling	12	12	12	11	-1	-8.3	-0.9
Commission-Based Wholesaling	12	4	5	6	1	20.0	-6.7
Road Transport	42	42	42	39	-3	-7.1	-0.7
Rail Transport	2	2	1	1	0	0.0	-6.7
Water Transport	0	0	0	0	0	na	na
Air and Space Transport	2	1	1	1	0	0.0	-6.7
Other Transport	6	7	5	6	1	20.0	0.0
Postal and Courier Pick-up and Delivery Services	13	16	16	16	0	0.0	2.1
Transport Support Services	3	2	2	2	0	0.0	-4.0
Warehousing and Storage Services	3	4	2	2	0	0.0	-4.0
Wholesale and Distribution	*129*	*138*	*133*	*135*	2	1.5	0.5
Motor Vehicle and Motor Vehicle Parts Retailing	14	17	17	16	-1	-5.9	1.3
Fuel Retailing	16	14	14	14	0	0.0	-1.3
Food Retailing	38	37	38	37	-1	-2.6	-0.3
Other Store-Based Retailing	92	101	96	93	-3	-3.1	0.1
Non-Store Retailing and Retail Commission Based Buying and/or Selling	11	8	6	6	0	0.0	-5.9
Accommodation	50	64	67	65	-2	-3.0	2.7
Food and Beverage Services	61	72	71	70	-1	-1.4	1.4
Repair and Maintenance	44	38	43	40	-3	-7.0	-0.9
Personal and Other Services	62	61	55	57	2	3.6	-0.8
Private Households Employing Staff	0	0	0	0	0	na	na
Retail Trade and Services	*388*	*412*	*407*	*398*	-9	-2.2	0.3
Electricity Supply	3	6	5	5	0	0.0	5.2
Gas Supply	0	0	0	0	0	na	na
Water Supply Sewerage and Drainage Services	2	3	3	3	0	0.0	4.1
Waste Collection Treatment and Disposal Services	4	6	5	5	0	0.0	2.3
Publishing (except Internet and Music Publishing)	3	5	6	7	1	16.7	8.8
Motion Picture and Sound Recording Activities	1	2	2	2	0	0.0	7.2
Broadcasting (except Internet)	3	4	3	3	0	0.0	0.0
Internet Publishing and Broadcasting	0	0	0	0	0	na	na
Telecommunications Services	1	0	0	0	0	na	-100.0
Internet Service Providers Web Search Portals and Data Processing Services	0	0	0	0	0	na	na
Library and Other Information Services	2	2	2	2	0	0.0	0.0
Finance	20	65	70	64	-6	-8.6	12.3
Insurance and Superannuation Funds	2	2	2	2	0	0.0	0.0
Auxiliary Finance and Insurance Services	9	14	13	15	2	15.4	5.2
Rental and Hiring Services (except Real Estate)	19	21	18	24	6	33.3	2.4
Property Operators and Real Estate Services	294	497	480	489	9	1.9	5.2
Professional Scientific and Technical Services (exc Comp Sys Dsn & related)	45	75	81	82	1	1.2	6.2
Computer System Design and Related Services	7	4	6	5	-1	-16.7	-3.3
Administrative Services	14	20	19	17	-2	-10.5	2.0
Building Cleaning Pest Control and Other Support Services	6	22	24	21	-3	-12.5	13.3
Business Services	*435*	*748*	*739*	*746*	7	0.9	5.5
Heritage Activities	5	5	6	6	0	0.0	1.8
Artistic Activities	3	7	9	7	-2	-22.2	8.8
Sport and Recreation Activities	35	41	45	46	1	2.2	2.8
Gambling Activities	0	0	0	0	0	na	na
Arts and Recreation Services	*43*	*53*	*60*	*59*	-1	-1.7	3.2
Public Administration	7	6	6	6	0	0.0	-1.5
Defence	1	1	1	0	-1	-100.0	-100.0
Public Order Safety and Regulatory Services	18	20	20	20	0	0.0	1.1
Preschool and School Education	39	37	35	36	1	2.9	-0.8
Tertiary Education	1	2	1	1	0	0.0	0.0
Adult Community and Other Education	8	11	9	9	0	0.0	1.2
Hospitals	1	1	1	1	0	0.0	0.0
Medical and Other Health Care Services	51	48	47	51	4	8.5	0.0
Residential Care Services	15	13	13	13	0	0.0	-1.4
Social Assistance Services	8	18	17	16	-1	-5.9	7.2
Social Services	*149*	*157*	*150*	*153*	3	2.0	0.3
TOTAL ALL INDUSTRIES	**2,476**	**2,867**	**2,833**	**2,858**	**25**	**0.9**	**1.4**
Tourism sector	147	189	185	188	3	1.7	2.5

Table 8.17. Employment in Key Sectors, Waitaki District, 2002 to 2012

Key sectors employment (FTEs)	Year ending March				%pa change	
	2002	2010	2011	2012	2011 to 2012	2002 to 2012
Primary production	1,734	2,044	2,289	2,441	*6.6*	*3.5*
Primary processing	1,403	1,628	1,554	1,835	*18.1*	*2.7*
Creative	113	134	153	145	*-5.0*	*2.5*
Education and research	534	589	607	548	*-9.7*	*0.3*
Engineering, machinery and equipment manufacturing	34	83	65	63	*-2.4*	*6.5*
Key sectors (excluding Tourism)	**3,818**	**4,477**	**4,667**	**5,032**	***7.8***	***2.8***
Non-key sectors	**4,432**	**5,040**	**5,174**	**5,033**	***-2.7***	***1.3***
Total employment: Waitaki District	**8,250**	**9,516**	**9,841**	**10,065**	***2.3***	***2.0***
Tourism sector	594	746	736	719	***-2.3***	***1.9***

Source: BERL Regional Database 2012

Table 8.18. GDP in Key Sectors, Waitaki District, 2002 to 2012

Key sectors GDP (2012$m)	Year ending March				%pa change	
	2002	2010	2011	2012	2011 to 2012	2002 to 2012
Primary production	140	150	159	190	*19.7*	*3.1*
Primary processing	150	218	207	248	*19.7*	*5.1*
Creative	4	4	4	4	*-7.9*	*0.3*
Education and research	37	31	32	28	*-13.6*	*-2.8*
Engineering, machinery and equipment manufacturing	3	7	6	6	*-0.2*	*7.7*
Key sectors (excluding Tourism)	**335**	**410**	**408**	**476**	***16.5***	***3.6***
Non-key sectors	**312**	**417**	**419**	**417**	***-0.4***	***3.0***
Total GDP: Waitaki District	**646**	**827**	**827**	**893**	***7.9***	***3.3***
Tourism sector	29	44	43	42	***-0.5***	***3.8***

Source: BERL Regional Database 2012

Table 8.19. Business Units in Key Sectors, Waitaki District, 2002 to 2012

Key sectors business units	Year ending March				%pa change	
	2002	2010	2011	2012	2011 to 2012	2002 to 2012
Primary production	1,102	1,028	1,007	1,039	*3.2*	*-0.6*
Primary processing	30	32	36	32	*-11.1*	*0.6*
Creative	4	4	4	4	*-7.9*	*0.3*
Education and research	54	56	52	53	*1.9*	*-0.2*
Engineering, machinery and equipment manufacturing	10	23	22	24	*9.1*	*9.1*
Key sectors (excluding Tourism)	**1,200**	**1,143**	**1,121**	**1,152**	***2.7***	***-0.4***
Non-key sectors	**1,276**	**1,724**	**1,712**	**1,706**	***-0.3***	***2.9***
Total business units: Waitaki District	**2,476**	**2,867**	**2,833**	**2,858**	***0.9***	***1.4***
Tourism sector	147	189	185	188	***1.7***	***2.5***

Source: BERL Regional Database 2012

8.11 Detailed tables - New Zealand

Employment (FTEs) for New Zealand	2002	2010	2011	2012	change 2011-2012		Change 2002 to 2012 %pa
					Number	%	
Agriculture	111,042	101,975	107,342	106,679	-663	-0.6	-0.4
Aquaculture	821	701	762	739	-23	-3.1	-1.1
Forestry and Logging	5,767	4,216	4,590	4,653	63	1.4	-2.1
Fishing Hunting and Trapping	2,001	1,555	1,561	1,469	-92	-5.9	-3.0
Agriculture Forestry and Fishing Support Services	18,847	23,061	24,133	23,135	-998	-4.1	2.1
Coal Mining	818	1,413	1,371	2,160	789	57.6	10.2
Oil and Gas Extraction	465	685	568	676	108	19.0	3.8
Metal Ore Mining	437	893	1,095	1,377	282	25.7	12.2
Non-Metallic Mineral Mining and Quarrying	1,993	1,949	2,021	2,053	32	1.6	0.3
Exploration and Other Mining Support Services	528	1,780	1,788	1,260	-529	-29.6	9.1
Primary	*142,720*	*138,229*	*145,232*	*144,201*	-1,031	-0.7	0.1
Food Product Manufacturing	73,458	72,137	69,417	71,465	2,047	2.9	-0.3
Beverage and Tobacco Product Manufacturing	5,683	6,439	6,341	6,493	153	2.4	1.3
Textile Leather Clothing and Footwear Manufacturing	20,179	11,887	11,430	10,927	-503	-4.4	-5.9
Wood Product Manufacturing	20,440	16,267	16,736	16,417	-320	-1.9	-2.2
Pulp Paper and Converted Paper Product Manufacturing	6,608	4,733	4,822	4,382	-441	-9.1	-4.0
Printing	10,541	9,234	9,297	9,313	17	0.2	-1.2
Petroleum and Coal Product Manufacturing	1,161	1,447	1,446	1,409	-37	-2.6	2.0
Basic Chemical and Chemical Product Manufacturing	8,216	6,242	6,296	6,540	243	3.9	-2.3
Polymer Product and Rubber Product Manufacturing	12,394	10,117	9,910	10,380	470	4.7	-1.8
Non-Metallic Mineral Product Manufacturing	6,328	7,241	6,839	6,770	-69	-1.0	0.7
Primary Metal and Metal Product Manufacturing	6,466	4,986	5,102	5,190	89	1.7	-2.2
Fabricated Metal Product Manufacturing	22,225	22,597	22,851	22,565	-286	-1.3	0.2
Transport Equipment Manufacturing	13,606	12,527	12,570	12,481	-90	-0.7	-0.9
Machinery and Equipment Manufacturing	27,706	26,948	26,303	27,204	901	3.4	-0.2
Furniture and Other Manufacturing	12,306	8,845	8,804	8,334	-470	-5.3	-3.8
Manufacturing	*247,318*	*221,646*	*218,164*	*219,870*	1,705	0.8	-1.2
Building Construction	22,140	36,516	33,797	32,696	-1,102	-3.3	4.0
Heavy and Civil Engineering Construction	25,278	39,290	39,675	40,966	1,291	3.3	4.9
Construction Services	59,965	90,794	88,611	87,611	-1,000	-1.1	3.9
Construction	*107,383*	*166,600*	*162,083*	*161,272*	-811	-0.5	4.2
Basic Material Wholesaling	16,794	20,230	20,327	20,584	257	1.3	2.1
Machinery and Equipment Wholesaling	27,025	29,641	30,043	30,920	877	2.9	1.4
Motor Vehicle and Motor Vehicle Parts Wholesaling	7,014	7,541	6,948	7,128	180	2.6	0.2
Grocery Liquor and Tobacco Product Wholesaling	17,122	20,157	22,216	22,592	376	1.7	2.8
Other Goods Wholesaling	25,324	22,327	22,486	22,681	196	0.9	-1.1
Commission-Based Wholesaling	2,496	2,806	2,735	2,858	123	4.5	1.4
Road Transport	29,689	32,691	33,747	34,726	979	2.9	1.6
Rail Transport	1,810	2,287	2,502	2,381	-121	-4.8	2.8
Water Transport	2,165	1,734	1,653	1,851	197	11.9	-1.6
Air and Space Transport	8,125	9,952	10,272	10,375	103	1.0	2.5
Other Transport	1,795	1,708	1,721	1,825	104	6.1	0.2
Postal and Courier Pick-up and Delivery Services	17,346	11,370	10,636	10,650	14	0.1	-4.8
Transport Support Services	11,880	13,652	14,357	15,035	679	4.7	2.4
Warehousing and Storage Services	4,819	5,640	5,195	5,682	488	9.4	1.7
Wholesale and Distribution	*173,405*	*181,736*	*184,838*	*189,289*	4,451	2.4	0.9
Motor Vehicle and Motor Vehicle Parts Retailing	19,396	15,193	14,942	14,790	-152	-1.0	-2.7
Fuel Retailing	12,653	7,244	7,802	7,649	-153	-2.0	-4.9
Food Retailing	54,641	50,570	51,662	50,913	-748	-1.4	-0.7
Other Store-Based Retailing	97,209	86,739	90,176	87,711	-2,464	-2.7	-1.0
Non-Store Retailing and Retail Commission Based Buying and/or Selling	1,838	1,526	1,604	1,769	165	10.3	-0.4
Accommodation	22,693	25,303	25,348	24,920	-428	-1.7	0.9
Food and Beverage Services	62,364	77,225	76,977	80,210	3,233	4.2	2.5
Repair and Maintenance	21,978	25,138	25,230	25,643	413	1.6	1.6
Personal and Other Services	27,102	34,958	34,603	34,539	-64	-0.2	2.5
Private Households Employing Staff	0	0	0	0	0	na	na
Retail Trade and Services	*319,873*	*323,896*	*328,344*	*328,145*	-199	-0.1	0.3
Electricity Supply	4,625	5,863	6,874	6,983	109	1.6	4.2
Gas Supply	305	441	518	550	32	6.1	6.1
Water Supply Sewerage and Drainage Services	1,536	1,653	1,661	1,784	123	7.4	1.5
Waste Collection Treatment and Disposal Services	2,931	4,529	4,638	4,830	192	4.1	5.1
Publishing (except Internet and Music Publishing)	16,986	10,059	10,282	7,514	-2,768	-26.9	-7.8
Motion Picture and Sound Recording Activities	2,856	3,275	3,383	3,237	-146	-4.3	1.3
Broadcasting (except Internet)	5,135	6,044	5,850	6,025	175	3.0	1.6
Internet Publishing and Broadcasting	10	90	92	98	6	6.8	26.0
Telecommunications Services	8,010	10,614	10,623	11,465	842	7.9	3.7
Internet Service Providers Web Search Portals and Data Processing Services	4,428	2,557	2,520	2,575	56	2.2	-5.3
Library and Other Information Services	1,589	3,558	3,377	3,520	143	4.2	8.3
Finance	26,729	31,225	31,518	32,677	1,158	3.7	2.0
Insurance and Superannuation Funds	8,205	9,514	9,934	10,623	689	6.9	2.6
Auxiliary Finance and Insurance Services	9,591	12,143	12,881	13,345	464	3.6	3.4
Rental and Hiring Services (except Real Estate)	8,469	10,367	11,099	11,258	159	1.4	2.9
Property Operators and Real Estate Services	12,840	13,245	13,244	13,650	406	3.1	0.6
Professional Scientific and Technical Services (exc Comp Sys Dsn & related)	80,561	113,504	117,212	120,994	3,782	3.2	4.2
Computer System Design and Related Services	14,371	19,981	21,564	23,629	2,065	9.6	5.1
Administrative Services	49,979	55,354	58,995	61,381	2,386	4.0	2.1
Building Cleaning Pest Control and Other Support Services	22,412	20,877	22,123	22,527	404	1.8	0.1
Business Services	*281,567*	*334,894*	*348,389*	*358,666*	10,276	2.9	2.4
Heritage Activities	3,977	6,183	6,320	6,028	-291	-4.6	4.2
Artistic Activities	1,706	1,868	1,936	2,229	293	15.2	2.7
Sport and Recreation Activities	16,488	20,782	20,727	20,112	-615	-3.0	2.0
Gambling Activities	3,362	2,907	3,013	3,097	84	2.8	-0.8
Arts and Recreation Services	*25,533*	*31,740*	*31,995*	*31,466*	-530	-1.7	2.1
Public Administration	40,688	57,665	56,524	57,640	1,116	2.0	3.5
Defence	12,886	15,301	15,090	14,242	-848	-5.6	1.0
Public Order Safety and Regulatory Services	31,270	39,472	41,316	42,573	1,257	3.0	3.1
Preschool and School Education	78,779	97,837	100,096	100,652	556	0.6	2.5
Tertiary Education	12,799	35,806	37,385	37,654	269	0.7	11.4
Adult Community and Other Education	4,607	12,940	12,028	11,157	-871	-7.2	9.2
Hospitals	47,160	62,861	63,578	64,483	905	1.4	3.2
Medical and Other Health Care Services	18,053	52,011	52,158	52,773	615	1.2	11.3
Residential Care Services	27,058	36,333	38,271	39,172	901	2.4	3.8
Social Assistance Services	7,834	23,207	25,276	25,992	716	2.8	12.7
Social Services	*281,133*	*433,433*	*441,721*	*446,337*	4,617	1.0	4.7
TOTAL ALL INDUSTRIES	**1,578,933**	**1,832,175**	**1,860,767**	**1,879,245**	**18,479**	**1.0**	**1.8**
Tourism sector	*91,453*	*98,818*	*99,738*	*102,453*	*2,715*	*2.7*	*1.1*

Real value added (GDP 2012$m) for New Zealand	2002	2010	2011	2012	change 2011-2012		Change 2002 to 2012 %pa
					Number	%	
Agriculture	6,573	6,622	6,122	8,008	1,886	30.8	2.0
Aquaculture	460	447	474	490	16	3.3	0.6
Forestry and Logging	1,902	2,052	2,248	2,325	77	3.4	2.0
Fishing Hunting and Trapping	1,121	992	971	974	3	0.3	-1.4
Agriculture Forestry and Fishing Support Services	1,116	1,497	1,376	1,737	360	26.2	4.5
Coal Mining	172	128	119	147	28	23.5	-1.6
Oil and Gas Extraction	1,060	1,646	1,630	1,395	-236	-14.5	2.8
Metal Ore Mining	92	81	95	93	-1	-1.5	0.2
Non-Metallic Mineral Mining and Quarrying	419	177	175	139	-36	-20.4	-10.4
Exploration and Other Mining Support Services	111	162	155	85	-69	-44.8	-2.6
Primary	*13,025*	*13,805*	*13,365*	*15,393*	2,028	15.2	1.7
Food Product Manufacturing	7,805	9,558	9,134	9,553	419	4.6	2.0
Beverage and Tobacco Product Manufacturing	604	853	834	868	34	4.0	3.7
Textile Leather Clothing and Footwear Manufacturing	1,216	1,175	1,030	941	-89	-8.7	-2.5
Wood Product Manufacturing	2,591	2,745	2,829	2,880	51	1.8	1.1
Pulp Paper and Converted Paper Product Manufacturing	838	799	815	769	-46	-5.7	-0.9
Printing	387	419	386	446	60	15.5	1.4
Petroleum and Coal Product Manufacturing	287	375	383	359	-24	-6.2	2.3
Basic Chemical and Chemical Product Manufacturing	2,033	1,619	1,667	1,668	0	0.0	-2.0
Polymer Product and Rubber Product Manufacturing	3,066	2,624	2,624	2,647	23	0.9	-1.5
Non-Metallic Mineral Product Manufacturing	999	1,146	1,125	1,101	-24	-2.2	1.0
Primary Metal and Metal Product Manufacturing	802	514	542	561	19	3.4	-3.5
Fabricated Metal Product Manufacturing	2,757	2,328	2,428	2,437	10	0.4	-1.2
Transport Equipment Manufacturing	1,152	1,102	1,243	1,293	49	4.0	1.2
Machinery and Equipment Manufacturing	2,346	2,370	2,602	2,817	216	8.3	1.8
Furniture and Other Manufacturing	761	621	593	562	-31	-5.2	-3.0
Manufacturing	*27,644*	*28,248*	*28,235*	*28,902*	667	2.4	0.4
Building Construction	1,499	2,227	2,178	1,945	-233	-10.7	2.6
Heavy and Civil Engineering Construction	1,712	2,396	2,557	2,437	-119	-4.7	3.6
Construction Services	4,061	5,537	5,710	5,212	-498	-8.7	2.5
Construction	*7,271*	*10,160*	*10,444*	*9,594*	-850	-8.1	2.8
Basic Material Wholesaling	1,967	2,260	2,375	2,435	60	2.5	2.2
Machinery and Equipment Wholesaling	3,165	3,312	3,510	3,657	147	4.2	1.5
Motor Vehicle and Motor Vehicle Parts Wholesaling	821	843	812	843	31	3.9	0.3
Grocery Liquor and Tobacco Product Wholesaling	2,005	2,252	2,596	2,672	77	2.9	2.9
Other Goods Wholesaling	2,966	2,495	2,627	2,683	56	2.1	-1.0
Commission-Based Wholesaling	292	314	320	338	19	5.8	1.5
Road Transport	3,630	4,637	4,944	4,984	40	0.8	3.2
Rail Transport	221	324	366	342	-25	-6.8	4.4
Water Transport	265	246	242	266	23	9.7	0.0
Air and Space Transport	993	1,412	1,505	1,489	-16	-1.1	4.1
Other Transport	219	242	252	262	10	3.9	1.8
Postal and Courier Pick-up and Delivery Services	2,121	1,613	1,558	1,528	-30	-1.9	-3.2
Transport Support Services	1,452	1,936	2,103	2,158	54	2.6	4.0
Warehousing and Storage Services	589	800	761	815	54	7.2	3.3
Wholesale and Distribution	*20,706*	*22,686*	*23,971*	*24,471*	500	2.1	1.7
Motor Vehicle and Motor Vehicle Parts Retailing	878	1,024	999	1,058	59	5.9	1.9
Fuel Retailing	573	488	522	547	26	4.9	-0.5
Food Retailing	2,475	3,407	3,454	3,642	188	5.5	3.9
Other Store-Based Retailing	4,403	5,844	6,029	6,275	246	4.1	3.6
Non-Store Retailing and Retail Commission Based Buying and/or Selling	83	103	107	127	19	18.0	4.3
Accommodation	734	813	831	821	-9	-1.1	1.1
Food and Beverage Services	2,017	2,481	2,522	2,644	122	4.8	2.7
Repair and Maintenance	1,280	1,230	1,217	1,229	13	1.0	-0.4
Personal and Other Services	1,578	1,710	1,669	1,656	-13	-0.8	0.5
Private Households Employing Staff	0	0	0	0	0	na	na
Retail Trade and Services	*14,021*	*17,099*	*17,349*	*17,999*	650	3.7	2.5
Electricity Supply	1,907	2,318	2,556	2,477	-78	-3.1	2.7
Gas Supply	126	174	193	195	2	1.3	4.5
Water Supply Sewerage and Drainage Services	633	654	618	633	15	2.5	0.0
Waste Collection Treatment and Disposal Services	1,208	1,790	1,724	1,713	-11	-0.6	3.6
Publishing (except Internet and Music Publishing)	624	457	427	360	-67	-15.7	-5.4
Motion Picture and Sound Recording Activities	222	224	244	228	-16	-6.4	0.3
Broadcasting (except Internet)	399	413	421	424	3	0.7	0.6
Internet Publishing and Broadcasting	1	6	7	7	0	4.5	24.7
Telecommunications Services	6,689	11,533	11,556	11,458	-98	-0.8	5.5
Internet Service Providers Web Search Portals and Data Processing Services	3,697	2,778	2,741	2,574	-167	-6.1	-3.6
Library and Other Information Services	93	174	163	169	6	3.6	6.2
Finance	3,541	5,192	5,139	5,282	143	2.8	4.1
Insurance and Superannuation Funds	1,087	1,582	1,620	1,717	98	6.0	4.7
Auxiliary Finance and Insurance Services	1,271	2,019	2,100	2,157	57	2.7	5.4
Rental and Hiring Services (except Real Estate)	1,990	2,678	2,825	2,865	40	1.4	3.7
Property Operators and Real Estate Services	1,293	1,472	1,448	1,495	47	3.2	1.5
Professional Scientific and Technical Services (exc Comp Sys Dsn & related)	8,257	10,452	10,722	11,232	510	4.8	3.1
Computer System Design and Related Services	1,473	1,840	1,973	2,194	221	11.2	4.1
Administrative Services	2,158	2,628	2,667	2,821	154	5.8	2.7
Building Cleaning Pest Control and Other Support Services	968	991	1,000	1,035	35	3.5	0.7
Business Services	*37,636*	*49,374*	*50,143*	*51,039*	895	1.8	3.1
Heritage Activities	309	422	455	424	-31	-6.7	3.2
Artistic Activities	133	128	139	157	18	12.6	1.7
Sport and Recreation Activities	1,282	1,419	1,492	1,416	-76	-5.1	1.0
Gambling Activities	196	142	145	148	3	2.2	-2.7
Arts and Recreation Services	*1,920*	*2,112*	*2,232*	*2,146*	-86	-3.9	1.1
Public Administration	3,141	5,372	5,372	5,347	-25	-0.5	5.5
Defence	775	1,115	1,113	1,034	-79	-7.1	2.9
Public Order Safety and Regulatory Services	1,882	2,876	3,048	3,090	42	1.4	5.1
Preschool and School Education	5,254	4,810	4,885	4,968	82	1.7	-0.6
Tertiary Education	854	1,760	1,825	1,859	34	1.9	8.1
Adult Community and Other Education	307	636	587	551	-36	-6.2	6.0
Hospitals	4,449	4,952	5,063	4,948	-115	-2.3	1.1
Medical and Other Health Care Services	1,703	4,097	4,153	4,050	-104	-2.5	9.0
Residential Care Services	2,552	2,862	3,048	3,006	-42	-1.4	1.6
Social Assistance Services	456	1,136	1,219	1,246	27	2.2	10.6
Social Services	*21,373*	*29,616*	*30,313*	*30,098*	-215	-0.7	3.5
Subtotal	*143,598*	*173,100*	*176,053*	*179,641*	3,589	2.0	2.3
Owner-Occupied Dwellings and Property Operators	*21,211*	*26,525*	*26,554*	*26,905*	351	1.3	2.4
TOTAL ALL INDUSTRIES	**164,809**	**199,624**	**202,607**	**206,546**	**3,939**	**1.9**	**2.3**
Tourism sector	*5,857*	*7,121*	*7,343*	*7,458*	*115*	*1.6*	*2.4*

Activity units for New Zealand	2002	2010	2011	2012	change 2011-2012		Change 2002 to 2012 %pa
					Number	%	
Agriculture	73,565	62,933	61,642	60,683	-959	-1.6	-1.9
Aquaculture	378	315	306	319	13	4.2	-1.7
Forestry and Logging	5,690	5,127	5,112	5,006	-106	-2.1	-1.3
Fishing Hunting and Trapping	1,976	1,464	1,435	1,430	-5	-0.3	-3.2
Agriculture Forestry and Fishing Support Services	5,693	6,044	5,897	5,981	84	1.4	0.5
Coal Mining	39	39	41	47	6	14.6	1.9
Oil and Gas Extraction	18	50	47	61	14	29.8	13.0
Metal Ore Mining	77	82	82	95	13	15.9	2.1
Non-Metallic Mineral Mining and Quarrying	335	352	360	350	-10	-2.8	0.4
Exploration and Other Mining Support Services	73	202	224	255	31	13.8	13.3
Primary	*87,844*	*76,608*	*75,146*	*74,227*	-919	-1.2	-1.7
Food Product Manufacturing	2,460	2,830	2,891	2,917	26	0.9	1.7
Beverage and Tobacco Product Manufacturing	368	581	600	607	7	1.2	5.1
Textile Leather Clothing and Footwear Manufacturing	2,125	1,829	1,769	1,691	-78	-4.4	-2.3
Wood Product Manufacturing	2,334	2,112	2,030	1,941	-89	-4.4	-1.8
Pulp Paper and Converted Paper Product Manufacturing	125	118	120	124	4	3.3	-0.1
Printing	1,552	1,492	1,456	1,415	-41	-2.8	-0.9
Petroleum and Coal Product Manufacturing	51	60	60	59	-1	-1.7	1.5
Basic Chemical and Chemical Product Manufacturing	530	516	524	530	6	1.1	0.0
Polymer Product and Rubber Product Manufacturing	764	758	766	757	-9	-1.2	-0.1
Non-Metallic Mineral Product Manufacturing	893	973	947	952	5	0.5	0.6
Primary Metal and Metal Product Manufacturing	272	240	227	234	7	3.1	-1.5
Fabricated Metal Product Manufacturing	3,213	3,323	3,185	3,119	-66	-2.1	-0.3
Transport Equipment Manufacturing	1,522	1,593	1,599	1,577	-22	-1.4	0.4
Machinery and Equipment Manufacturing	3,491	3,839	3,800	3,779	-21	-0.6	0.8
Furniture and Other Manufacturing	2,781	2,482	2,397	2,338	-59	-2.5	-1.7
Manufacturing	*22,481*	*22,746*	*22,371*	*22,040*	-331	-1.5	-0.2
Building Construction	12,430	17,735	17,338	17,094	-244	-1.4	3.2
Heavy and Civil Engineering Construction	1,661	1,872	1,788	1,827	39	2.2	1.0
Construction Services	26,281	31,940	31,357	31,084	-273	-0.9	1.7
Construction	*40,372*	*51,547*	*50,483*	*50,005*	-478	-0.9	2.2
Basic Material Wholesaling	3,288	4,085	4,053	4,050	-3	-0.1	2.1
Machinery and Equipment Wholesaling	4,779	4,778	4,751	4,752	1	0.0	-0.1
Motor Vehicle and Motor Vehicle Parts Wholesaling	1,701	1,700	1,725	1,749	24	1.4	0.3
Grocery Liquor and Tobacco Product Wholesaling	2,407	2,459	2,452	2,529	77	3.1	0.5
Other Goods Wholesaling	6,299	6,410	6,341	6,215	-126	-2.0	-0.1
Commission-Based Wholesaling	1,076	859	829	813	-16	-1.9	-2.8
Road Transport	7,946	8,765	8,567	8,493	-74	-0.9	0.7
Rail Transport	92	60	58	58	0	0.0	-4.5
Water Transport	151	216	230	226	-4	-1.7	4.1
Air and Space Transport	428	462	434	435	1	0.2	0.2
Other Transport	650	1,011	1,027	1,014	-13	-1.3	4.5
Postal and Courier Pick-up and Delivery Services	3,389	3,506	3,473	3,447	-26	-0.7	0.2
Transport Support Services	1,093	1,353	1,361	1,422	61	4.5	2.7
Warehousing and Storage Services	549	691	676	701	25	3.7	2.5
Wholesale and Distribution	*33,848*	*36,355*	*35,977*	*35,904*	-73	-0.2	0.6
Motor Vehicle and Motor Vehicle Parts Retailing	2,791	3,024	3,042	2,997	-45	-1.5	0.7
Fuel Retailing	1,572	1,239	1,195	1,182	-13	-1.1	-2.8
Food Retailing	5,532	6,195	6,238	6,366	128	2.1	1.4
Other Store-Based Retailing	17,829	21,096	20,926	20,659	-267	-1.3	1.5
Non-Store Retailing and Retail Commission Based Buying and/or Selling	1,327	1,594	1,709	1,774	65	3.8	2.9
Accommodation	4,146	5,084	5,003	4,947	-56	-1.1	1.8
Food and Beverage Services	11,228	14,219	14,455	14,549	94	0.7	2.6
Repair and Maintenance	9,107	9,968	9,909	9,967	58	0.6	0.9
Personal and Other Services	9,917	12,302	12,333	12,342	9	0.1	2.2
Private Households Employing Staff	0	0	0	0	0	na	na
Retail Trade and Services	*63,449*	*74,721*	*74,810*	*74,783*	-27	0.0	1.7
Electricity Supply	204	238	258	258	0	0.0	2.4
Gas Supply	35	35	31	35	4	12.9	0.0
Water Supply Sewerage and Drainage Services	162	218	228	229	1	0.4	3.5
Waste Collection Treatment and Disposal Services	759	902	894	916	22	2.5	1.9
Publishing (except Internet and Music Publishing)	808	970	985	999	14	1.4	2.1
Motion Picture and Sound Recording Activities	1,810	3,147	2,966	3,113	147	5.0	5.6
Broadcasting (except Internet)	277	261	267	268	1	0.4	-0.3
Internet Publishing and Broadcasting	7	57	71	75	4	5.6	26.8
Telecommunications Services	300	362	386	379	-7	-1.8	2.4
Internet Service Providers Web Search Portals and Data Processing Services	369	475	488	483	-5	-1.0	2.7
Library and Other Information Services	302	343	340	343	3	0.9	1.3
Finance	7,803	24,990	24,995	24,454	-541	-2.2	12.1
Insurance and Superannuation Funds	1,504	906	907	894	-13	-1.4	-5.1
Auxiliary Finance and Insurance Services	4,573	6,020	5,886	5,731	-155	-2.6	2.3
Rental and Hiring Services (except Real Estate)	6,109	5,886	5,762	5,720	-42	-0.7	-0.7
Property Operators and Real Estate Services	55,355	91,827	91,655	92,241	586	0.6	5.2
Professional Scientific and Technical Services (exc Comp Sys Dsn & related)	29,588	41,284	41,747	42,040	293	0.7	3.6
Computer System Design and Related Services	6,348	9,155	9,473	9,778	305	3.2	4.4
Administrative Services	6,422	8,828	8,786	8,860	74	0.8	3.3
Building Cleaning Pest Control and Other Support Services	4,657	6,825	6,909	6,989	80	1.2	4.1
Business Services	*127,392*	*202,729*	*203,034*	*203,805*	771	0.4	4.8
Heritage Activities	437	517	510	512	2	0.4	1.6
Artistic Activities	2,306	3,077	2,989	3,048	59	2.0	2.8
Sport and Recreation Activities	5,479	6,226	6,196	6,190	-6	-0.1	1.2
Gambling Activities	234	205	195	185	-10	-5.1	-2.3
Arts and Recreation Services	*8,456*	*10,025*	*9,890*	*9,935*	45	0.5	1.6
Public Administration	1,485	1,331	1,300	1,267	-33	-2.5	-1.6
Defence	69	47	54	53	-1	-1.9	-2.6
Public Order Safety and Regulatory Services	2,282	2,536	2,553	2,544	-9	-0.4	1.1
Preschool and School Education	5,087	5,471	5,496	5,575	79	1.4	0.9
Tertiary Education	622	798	831	895	64	7.7	3.7
Adult Community and Other Education	2,528	3,488	3,543	3,562	19	0.5	3.5
Hospitals	266	223	220	210	-10	-4.5	-2.3
Medical and Other Health Care Services	11,304	15,209	15,054	15,112	58	0.4	2.9
Residential Care Services	1,361	1,385	1,382	1,391	9	0.7	0.2
Social Assistance Services	2,115	3,017	3,050	3,073	23	0.8	3.8
Social Services	*27,119*	*33,505*	*33,483*	*33,682*	199	0.6	2.2
TOTAL ALL INDUSTRIES	**410,961**	**508,236**	**505,194**	**504,381**	**-813**	**-0.2**	**2.1**
Tourism sector	17,264	20,361	20,316	20,739	423	2.1	1.9

Table 8.20. Employment in Key Sectors, New Zealand, 2002 to 2012

Key sectors employment (FTEs)	Year ending March				%pa change	
	2002	2010	2011	2012	2011 to 2012	2002 to 2012
Primary production	142,720	138,229	145,232	144,201	*-0.7*	*0.1*
Primary processing	106,190	99,576	97,317	98,756	*1.5*	*-0.7*
Creative	48,793	43,826	44,386	42,179	*-5.0*	*-1.4*
Education and research	105,282	157,847	160,866	161,178	*0.2*	*4.4*
Engineering, machinery and equipment manufacturing	27,077	33,450	33,508	35,512	*6.0*	*2.7*
Key sectors (excluding Tourism)	**430,061**	**472,927**	**481,308**	**481,826**	***0.1***	***1.1***
Non-key sectors	**1,148,872**	**1,359,248**	**1,379,458**	**1,397,420**	***1.3***	***2.0***
Total employment: New Zealand	**1,578,933**	**1,832,175**	**1,860,767**	**1,879,245**	***1.0***	***1.8***
Tourism sector	91,453	98,818	99,738	102,453	***2.7***	***1.1***

Source: BERL Regional Database 2012

Table 8.21. GDP in Key Sectors, New Zealand, 2002 to 2012

Key sectors GDP (2012$m)	Year ending March				%pa change	
	2002	2010	2011	2012	2011 to 2012	2002 to 2012
Primary production	12,994	13,772	13,334	15,356	*15.2*	*1.7*
Primary processing	11,809	13,922	13,580	14,037	*3.4*	*1.7*
Creative	1,963	2,004	2,025	2,147	*6.0*	*0.9*
Education and research	7,343	8,275	8,366	8,496	*1.5*	*1.5*
Engineering, machinery and equipment manufacturing	2,406	2,934	3,097	3,384	*9.2*	*3.5*
Key sectors (excluding Tourism)	**36,514**	**40,906**	**40,402**	**43,419**	***7.5***	***1.7***
Non-key sectors	**106,745**	**131,785**	**135,235**	**135,797**	***0.4***	***2.4***
Total GDP: New Zealand	**143,259**	**172,691**	**175,637**	**179,217**	***2.0***	***2.3***
Tourism sector	5,857	7,121	7,343	7,458	***1.6***	***2.4***

Source: BERL Regional Database 2012

Table 8.22. Business Units in Key Sectors, New Zealand, 2002 to 2012

Key sectors business units	Year ending March				%pa change	
	2002	2010	2011	2012	2011 to 2012	2002 to 2012
Primary production	87,844	76,608	75,146	74,227	*-1.2*	*-1.7*
Primary processing	5,287	5,641	5,641	5,589	*-0.9*	*0.6*
Creative	1,963	2,004	2,025	2,147	*6.0*	*0.9*
Education and research	9,118	10,982	11,049	11,277	*2.1*	*2.1*
Engineering, machinery and equipment manufacturing	6,528	7,822	7,906	8,057	*1.9*	*2.1*
Key sectors (excluding Tourism)	**110,740**	**103,057**	**101,767**		***-100.0***	***-100.0***
Non-key sectors	**300,221**	**405,179**	**403,427**		***-100.0***	***-100.0***
Total business units: New Zealand	**410,961**	**508,236**	**505,194**	**504,381**	***-0.2***	***2.1***
Tourism sector	17,264	20,361	20,316	20,739	***2.1***	***1.9***

Source: BERL Regional Database 2012

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