

**Notice of Meeting:**

I hereby give notice that an ordinary meeting of the Economic Development Committee will be held on:

**Date:** Monday 21 June 2021

**Time:** 1.00 pm

**Venue:** Edinburgh Room, Municipal Chambers, The Octagon, Dunedin

Sandy Graham  
Chief Executive Officer

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## **Economic Development Committee**

### **PUBLIC AGENDA**

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**MEMBERSHIP**

|                                   |   |                      |
|-----------------------------------|---|----------------------|
| <b>Chairperson</b>                | Cr Chris Staynes                          |                      |
| <b>Deputy Chairperson</b>         | Cr Rachel Elder                           | Cr Andrew Whiley     |
| <b>Members</b>                    | Cr Sophie Barker                          | Cr David Benson-Pope |
|                                   | Cr Christine Garey                        | Cr Doug Hall         |
|                                   | Mayor Aaron Hawkins                       | Cr Carmen Houlahan   |
|                                   | Cr Marie Laufiso                          | Cr Mike Lord         |
|                                   | Cr Jim O'Malley                           | Cr Jules Radich      |
|                                   | Cr Lee Vandervis                          | Cr Steve Walker      |
| <b>Senior Officer</b>             | John Christie, Manager Enterprise Dunedin |                      |
| <b>Governance Support Officer</b> | Wendy Collard                             |                      |

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Wendy Collard  
Governance Support Officer

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**Note:** Reports and recommendations contained in this agenda are not to be considered as Council policy until adopted.



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**1 PUBLIC FORUM**

At the close of the agenda no requests for public forum had been received.

**2 APOLOGIES**

At the close of the agenda no apologies had been received.

**3 CONFIRMATION OF AGENDA**

Note: Any additions must be approved by resolution with an explanation as to why they cannot be delayed until a future meeting.

## **DECLARATION OF INTEREST**

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### **EXECUTIVE SUMMARY**

1. Members are reminded of the need to stand aside from decision-making when a conflict arises between their role as an elected representative and any private or other external interest they might have.
2. Elected members are reminded to update their register of interests as soon as practicable, including amending the register at this meeting if necessary.

### **RECOMMENDATIONS**

That the Committee:

- a) **Notes/Amends** if necessary the Elected Members' Interest Register attached as Attachment A; and
- b) **Confirms/Amends** the proposed management plan for Elected Members' Interests.

### **Attachments**

|  | <b>Title</b>                          | <b>Page</b> |
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| <a href="#">A</a> | Elected Members' Register of Interest | 7           |



| Councillor Register of Interest - Current as at 14 June 2021 |  |   |  |  |
|--|--|---|--|--|
| Name   | Responsibility<br>(i.e. Chairperson etc) | Declaration of Interests  | Nature of Potential Interest   | Member's Proposed Management Plan  |
| Aaron Hawkins  | Trustee                                  | West Harbour Beautification Trust                                   | Potential conflict WHBT work with Parks and Reserves to co-ordinate volunteer activities | Withdrawal from all West Harbour Beautification Trust/ DCC discussions involving this relationship.                                |
|  | Trustee                                  | St Paul's Cathedral Foundation                                      | No conflict identified   | Seek advice prior to the meeting if actual or perceived conflict of interest arises.   |
|  | Owner                                    | Residential Property Owner - Dunedin                                | No conflict identified   | Seek advice prior to the meeting if actual or perceived conflict of interest arises.   |
|  | Shareholder                              | Thank You Payroll   | No conflict identified   | Seek advice prior to the meeting if actual or perceived conflict of interest arises.   |
|  | Member                                   | ICLEI Oceania Regional Executive                                    | No conflict identified   | Seek advice prior to the meeting if actual or perceived conflict of interest arises.   |
|  | Member                                   | Dunedin Hospital Local Advisory Group                               | No conflict identified   | Seek advice prior to the meeting if actual or perceived conflict of interest arises.   |
|  | Member                                   | Green Party   | No conflict identified   | Seek advice prior to the meeting if actual or perceived conflict of interest arises.   |
|  | Member                                   | Connecting Dunedin (Council appointment)                            | No conflict identified   | Seek advice prior to the meeting if actual or perceived conflict of interest arises.   |
|  | Board Member                             | Otago Museum Trust Board (Council appointment)                      | Duties to Trust may conflict with duties of Council Office. Recipient of Council funding | Withdraw from discussion and leave the table. If the meeting is in confidential, leave the room. Seek advice prior to the meeting. |
|  | Member                                   | Otago Theatre Trust (Council appointment)                           | Potential grants recipient   | Withdraw from discussion and leave the table. If in confidential leave the room. Seek advice prior to the meeting.                 |
|  | Member                                   | Otago Polytech's Research Centre of Excellence                      | No conflict identified   | Seek advice prior to the meeting if actual or perceived conflict of interest arises.   |
|  | Member                                   | LGNZ National Council   | No conflict identified   | Seek advice prior to the meeting if actual or perceived conflict of interest arises.   |
|  | Trustee                                  | Alexander McMillan Trust  | No conflict identified   | Seek advice prior to the meeting if actual or perceived conflict of interest arises.   |
|  | Trustee                                  | Cosy Homes Trust  | No conflict identified   | Seek advice prior to the meeting if actual or perceived conflict of interest arises.   |
|  | Chair                                    | LGNZ Policy Advisory Group  | No conflict identified   | Seek advice prior to the meeting if actual or perceived conflict of interest arises.   |
|  | Member                                   | Local Government New Zealand Zone 6 Committee (Council appointment) | No conflict identified   | Seek advice prior to the meeting if actual or perceived conflict of interest arises.   |
| Sophie Barker  | Director                                 | Ayrmed Limited  | No conflict identified   | Seek advice prior to the meeting if actual or perceived conflict of interest arises.   |
|  | Shareholder                              | Ocho Newco Limited  | No conflict identified   | Seek advice prior to the meeting if actual or perceived conflict of interest arises.   |
|  | Shareholder                              | Various publicly listed companies                                   | No conflict identified   | Seek advice prior to the meeting if actual or perceived conflict of interest arises.   |
|  | Property Owner                           | Residential Property Owner - Dunedin                                | No conflict identified   | Seek advice prior to the meeting if actual or perceived conflict of interest arises.   |
|  | Beneficiary                              | Sans Peur Trust (Larnach Castle)                                    | No conflict identified   | Seek advice prior to the meeting if actual or perceived conflict of interest arises.   |
|  | Member                                   | Dunedin Public Art Gallery Society (Council appointment)            | Potential grants recipient   | Withdraw from discussion and leave the table. If the meeting is in confidential, leave the room. Seek advice prior to the meeting. |
|  | Chairperson                              | Dunedin Heritage Fund Trust (Council appointment)                   | Duty to Trust may conflict with duties of Council Office                                 | Withdraw from discussion and leave the table. If the meeting is in confidential, leave the room. Seek advice prior to the meeting. |

| Name              | Responsibility<br>(i.e. Chairperson etc) | Declaration of Interests  | Nature of Potential Interest                                  | Member's Proposed Management Plan   |
|-------------------|--|---|---|---|
|                   | Trustee                                  | Dunedin Midwinter Carnival  | Potential grants recipient                                    | With draw from discussion and leave the table. If the meeting is in confidential, leave the room. Seek advice prior to the meeting. |
|                   | Committee Member                         | Otago Anniversary Day Dinner  | No conflict Identified  | Withdraw from discussion and leave the table. If the meeting is in confidential, leave the room. Seek advice prior to the meeting.  |
|                   | Member                                   | Dunedin Gas Works Museum Trust (Council appointment)  | Potential grants recipient                                    | Withdraw from discussion and leave the table. If the meeting is in confidential, leave the room. Seek advice prior to the meeting.  |
| David Benson-Pope | Owner                                    | Residential Property Ownership in Dunedin   | No conflict identified  | Seek advice prior to the meeting if actual or perceived conflict of interest arises.  |
|                   | Trustee and Beneficiary                  | Blind Investment Trusts   | Duty to Trust may conflict with duties of Council Office      | Seek advice prior to the meeting if actual or perceived conflict of interest arises.  |
|                   | Member                                   | Yellow-eyed Penguin Trust   | No conflict identified  | Seek advice prior to the meeting if actual or perceived conflict of interest arises.  |
|                   | Member                                   | New Zealand Labour Party  | No conflict identified  | Seek advice prior to the meeting if actual or perceived conflict of interest arises.  |
|                   | Member                                   | Dunedin Heritage Fund Trust (Council appointment)   | Duty to Trust may conflict with duties of Council Office      | Withdraw from discussion and leave the table. If the meeting is in confidential, leave the room. Seek advice prior to the meeting.  |
|                   | Member                                   | Connecting Dunedin (Council appointment)  | No conflict identified  | Seek advice prior to the meeting if actual or perceived conflict of interest arises.  |
|                   | Member                                   | Tertiary Precinct Planning Group (Council appointment)  | No conflict identified  | Seek advice prior to the meeting if actual or perceived conflict of interest arises.  |
|                   | Delegation holder                        | Second Generation District Plan (2GP) Authority to Resolve Appeals on behalf of Council (Council appointment) | No conflict identified.                                       | Seek advice prior to the meeting if actual or perceived conflict of interest arises.  |
|                   | Member                                   | Dunedin Hospital Local Advisory Group   | No conflict identified  | Seek advice prior to the meeting if actual or perceived conflict of interest arises.  |
|                   | Member                                   | Otago Regional Transport Committee (Council appointment)  | No conflict identified  | Seek advice prior to the meeting if actual or perceived conflict of interest arises.  |
|                   | Commissioner (Community Representative)  | District Licensing Committee (Council appointment)  | No conflict identified  | Seek advice prior to the meeting if actual or perceived conflict of interest arises.  |
| Rachel Elder      | Owner                                    | Residential Property Ownership - Dunedin  | No conflict identified  | Seek advice prior to the meeting if actual or perceived conflict of interest arises.  |
|                   | Member                                   | Greater South Dunedin Action Group  | Decisions may be considered on the future of South Dunedin.   | Withdraw from discussion and leave the table. If in confidential leave the room. Seek advice prior to the meeting.                  |
|                   | Host Parent                              | Otago Girls High School   | No conflict identified  | Seek advice prior to the meeting if actual or perceived conflict of interest arises.  |
|                   | Advisor/Support Capacity                 | Kaffelagic  | No conflict identified  | Seek advice prior to the meeting if actual or perceived conflict of interest arises.  |
|                   | Member                                   | Dunedin Trails Networks Trust   | No conflict identified  | Seek advice prior to the meeting if actual or perceived conflict of interest arises.  |
|                   | Chair                                    | Southern Urban Dunedin Community Response Group   | Decisions about emergency response recovery may be conflicted | Seek advice prior to the meeting if actual or perceived conflict of interest arises.  |
|                   | Member                                   | Craigieburn Reserve Committee (Council appointment)   | No conflict identified  | Seek advice prior to the meeting if actual or perceived conflict of interest arises.  |
|                   | Member                                   | Keep Dunedin Beautiful (Council appointment)  | No conflict identified  | Seek advice prior to the meeting if actual or perceived conflict of interest arises.  |
|                   | Member                                   | Okia Reserve Management Committee (Council appointment)   | No conflict identified  | Seek advice prior to the meeting if actual or perceived conflict of interest arises.  |
|                   | Member                                   | Toitu Otago Settlers Museum Board (Council appointment)   | No conflict identified  | Seek advice prior to the meeting if actual or perceived conflict of interest arises.  |



| Name            | Responsibility<br>(i.e. Chairperson etc) | Declaration of Interests  | Nature of Potential Interest            | Member's Proposed Management Plan  |
|-----------------|--|---|---|--|
|                 | Chairperson                              | Disability Issues Advisory Group  | No conflict identified                  | Seek advice prior to the meeting if actual or perceived conflict of interest arises.   |
| Christine Garey | Trustee                                  | Garey Family Trust - Property Ownership - Dunedin                             | No conflict identified                  | Seek advice prior to the meeting if actual or perceived conflict of interest arises.   |
|                 | Chair                                    | Creative Dunedin Partnership (Council appointment)                            | No conflict identified                  | Seek advice prior to the meeting if actual or perceived conflict of interest arises.   |
|                 | Member                                   | Dunedin Symphony Orchestra Foundation Board of Trustees (Council appointment) | Potential grants recipient              | Withdraw from discussion and leave the table. If the meeting is in confidential, leave the room. Seek advice prior to the meeting.                     |
|                 | Member                                   | Theomin Gallery Management Committee (Olveston) (Council appointment)         | No conflict identified                  | Withdraw from discussion and leave the table. If the meeting is in confidential, leave the room. Seek advice prior to the meeting.                     |
|                 | Chair                                    | Grants Subcommittee (Council Appointment)                                     | No conflict identified                  | Withdraw from discussion and leave the table. If the meeting is in confidential, leave the room. Seek advice prior to the meeting.                     |
|                 | Member                                   | External family member is a Principal Security Consultant                     | Major supplier to DCC                   | Seek advice prior to the meeting if actual or perceived conflict of interest arises.   |
|                 | Member                                   | Local Government New Zealand Zone 6 Committee (Council Appointment)           | No conflict identified                  | Seek advice prior to the meeting if actual or perceived conflict of interest arises.   |
| Doug Hall       | Director/Owner                           | Hall Brothers Transport Ltd   | May contract and provide service to DCC | Withdraw from discussion and leave the table. If in confidential leave the room. Seek prior approval from Office of the Auditor General when required. |
|                 | Director/Owner                           | Dunedin Crane Hire  | May contract and provide service to DCC | Withdraw from discussion and leave the table. If in confidential leave the room. Seek prior approval from Office of the Auditor General when required. |
|                 | Director/Owner                           | Wood Recyclers Ltd  | May contract and provide service to DCC | Withdraw from discussion and leave the table. If in confidential leave the room. Seek prior approval from Office of the Auditor General when required. |
|                 | Director/Owner                           | Dunedin Concrete Crushing Ltd   | May contract and provide service to DCC | Withdraw from discussion and leave the table. If in confidential leave the room. Seek prior approval from Office of the Auditor General when required. |
|                 | Director/Owner                           | Anzide Properties Ltd - Dunedin   | No conflict identified                  | Seek advice prior to the meeting if actual or perceived conflict of interest arises.   |
|                 | Director/Shareholder                     | The Woodshed 2014 Limited   | May contract and provide service to DCC | Withdraw from discussion and leave the table. If in confidential leave the room. Seek prior approval from Office of the Auditor General when required. |
|                 | Owner                                    | Property Ownership - Dunedin  | No conflict identified                  | Seek advice prior to the meeting if actual or perceived conflict of interest arises.   |
|                 | Shareholder                              | Farmlands   | No conflict identified                  | Seek advice prior to the meeting if actual or perceived conflict of interest arises.   |
|                 | Shareholder                              | Ravensdown Fertiliser   | No conflict identified                  | Seek advice prior to the meeting if actual or perceived conflict of interest arises.   |
|                 | Shareholder                              | PGG Wrightson   | Currently no likely conflict            | Seek advice prior to the meeting if actual or perceived conflict of interest arises.   |
|                 | Shareholder                              | Silver Fern Farms   | No conflict identified                  | Seek advice prior to the meeting if actual or perceived conflict of interest arises.   |
|                 | Director/Shareholder                     | Valley View Development Limited   | No conflict identified                  | Seek advice prior to the meeting if actual or perceived conflict of interest arises.   |
|                 | Shareholder                              | Geekfix Limited   | No conflict identified                  | Seek advice prior to the meeting if actual or perceived conflict of interest arises.   |
|                 | Director                                 | Milburn Processing Limited  | No conflict identified                  | Seek advice prior to the meeting if actual or perceived conflict of interest arises.   |

| Name            | Responsibility<br>(i.e. Chairperson etc)                   | Declaration of Interests   | Nature of Potential Interest                             | Member's Proposed Management Plan  |
|-----------------|--|--|--|--|
|                 | Donor of the use of a building free of charge to the group | Fire Brigade Restoration Society   | No conflict identified                                   | Seek advice prior to the meeting if actual or perceived conflict of interest arises.   |
|                 | Appellant  | 2GP  | Appellant to the 2GP                                     | Withdraw from discussion and leave the table. If the meeting is in confidential, leave the room. Seek advice prior to the meeting. |
|                 | Financial Donor  | Dunedin North Community Patrol   | No conflict identified                                   | Seek advice prior to the meeting if actual or perceived conflict of interest arises.   |
|                 | Donor of the use of a building free of charge to the group | North Dunedin Blokes Shed  | No conflict identified                                   | Seek advice prior to the meeting if actual or perceived conflict of interest arises.   |
|                 | Partner  | Highland Helicopters   | No conflict identified                                   | Seek advice prior to the meeting if actual or perceived conflict of interest arises.   |
|                 | Supplier   | Southweight Truck and Weights for testing Weighbridges Otago & Southland | No conflict identified                                   | Seek advice prior to the meeting if actual or perceived conflict of interest arises.   |
|                 | Member   | Craigieburn Reserve Committee (Council appointment)                      | No conflict identified                                   | Seek advice prior to the meeting if actual or perceived conflict of interest arises.   |
|                 | Member   | Dunedin Chinese Garden Advisory Board (Council appointment)              | No conflict identified                                   | Seek advice prior to the meeting if actual or perceived conflict of interest arises.   |
|                 | Member   | Toitu Otago Settlers Museum Board (Council appointment)                  | No conflict identified                                   | Seek advice prior to the meeting if actual or perceived conflict of interest arises.   |
| Carmen Houlahan | Owner  | Residential Property - Dunedin   | No conflict identified                                   | Seek advice prior to the meeting if actual or perceived conflict of interest arises.   |
|                 | Owner  | Rental Property - North Dunedin  | No conflict identified                                   | Seek advice prior to the meeting if actual or perceived conflict of interest arises.   |
|                 | Part Owner   | Adobe Group Ltd, Wanaka  | No conflict identified                                   | Seek advice prior to the meeting if actual or perceived conflict of interest arises.   |
|                 | Member   | Dunedin Rotary Club  | No conflict identified                                   | Seek advice prior to the meeting if actual or perceived conflict of interest arises.   |
|                 | Member   | Institute of Directors   | No conflict identified                                   | Seek advice prior to the meeting if actual or perceived conflict of interest arises.   |
|                 | Member   | Otago Property Investors Association                                     | No conflict identified                                   | Seek advice prior to the meeting if actual or perceived conflict of interest arises.   |
|                 | Company Owner/Sole Director                                | Shelf Company - RU There   | No conflict identified                                   | Seek advice prior to the meeting if actual or perceived conflict of interest arises.   |
|                 | Member   | Toitu Otago Settlers Museum Board (Council appointment)                  | No conflict identified                                   | Seek advice prior to the meeting if actual or perceived conflict of interest arises.   |
|                 | Member   | Dunedin Public Art Gallery Acquisitions Committee (Council appointment)  | Possible grants recipient                                | Withdraw from discussion and leave the table. If in confidential leave the room. Seek advice prior to the meeting.                 |
|                 | Shareholder  | Startup Business   | No conflict identified                                   | Seek advice prior to the meeting if actual or perceived conflict of interest arises.   |
|                 | Member   | Mosgiel Taieri Community Board (Council appointment)                     | No conflict identified                                   | Seek advice prior to the meeting if actual or perceived conflict of interest arises.   |
| Marie Laufiso   | Property Owner   | Residential Property   | No conflict identified                                   | Seek advice prior to the meeting if actual or perceived conflict of interest arises.   |
|                 | Trustee  | Community Building Trust - Trust Owner of Property 111 Moray Place       | Duty to Trust may conflict with duties of Council Office | Seek advice prior to the meeting if actual or perceived conflict of interest arises.   |

| Name      | Responsibility<br>(i.e. Chairperson etc)             | Declaration of Interests   | Nature of Potential Interest  | Member's Proposed Management Plan  |
|-----------|--|--|---|--|
|           | Board Member   | Otago Mental Health Support Trust                                | Potential grants applicant which would result in pecuniary interest. Duty to Trust may conflict with duties of Council Office | Do not participate in consideration of grants applications. If the meeting is in confidential, to leave the room.  |
|           | Trustee  | Brockville Community Support Trust                               | Potential grants recipient  | Withdraw from discussion and leave the table. If in confidential leave the room. Seek advice prior to the meeting. |
|           | Trustee  | Corso Ōtepoti Dunedin Trust                                      | Potential grants recipient  | Withdraw from discussion and leave the table. If in confidential leave the room. Seek advice prior to the meeting. |
|           | Member   | Dunedin Manufacturing Holdings Inc                               | No conflict identified  | Seek advice prior to the meeting if actual or perceived conflict of interest arises.                               |
|           | National Secretary                                   | P.A.C.I.F.I.C.A Inc  | No conflict identified  | Seek advice prior to the meeting if actual or perceived conflict of interest arises.                               |
|           | National Communications Officer                      | P.A.C.I.F.I.C.A Inc  | No conflict identified  | Seek advice prior to the meeting if actual or perceived conflict of interest arises.                               |
|           | Dunedin Branch Treasurer                             | P.A.C.I.F.I.C.A Inc  | No conflict identified  | Seek advice prior to the meeting if actual or perceived conflict of interest arises.                               |
|           | Dunedin Branch delegate to Arai Te Uru Marae Council | P.A.C.I.F.I.C.A Inc  | No conflict identified  | Seek advice prior to the meeting if actual or perceived conflict of interest arises.                               |
|           | Member   | Green Party of Aotearoa New Zealand                              | No conflict identified  | Seek advice prior to the meeting if actual or perceived conflict of interest arises.                               |
|           | Member   | Age Concern (Council appointment)                                | No conflict identified  | Seek advice prior to the meeting if actual or perceived conflict of interest arises.                               |
|           | Member   | Dunedin Abrahamic Interfaith Group (Council appointment)         | No conflict identified  | Seek advice prior to the meeting if actual or perceived conflict of interest arises.                               |
|           | Chair  | Dunedin Refugee Steering Group (Council appointment)             | No conflict identified  | Seek advice prior to the meeting if actual or perceived conflict of interest arises.                               |
|           | Member   | Otago Settlers Association (Council appointment)                 | No conflict identified  | Seek advice prior to the meeting if actual or perceived conflict of interest arises.                               |
|           | Member   | Dunedin Fair Trading Committee (Council appointment)             | No conflict identified  | Seek advice prior to the meeting if actual or perceived conflict of interest arises.                               |
|           | Deputy Chair   | Grants Subcommittee  | No conflict identified  | Seek advice prior to the meeting if actual or perceived conflict of interest arises.                               |
|           | Chair  | Social Well Being Advisory Group (Council appointment)           | No conflict identified  | Seek advice prior to the meeting if actual or perceived conflict of interest arises.                               |
| Mike Lord | Trustee  | ML Lord Family Trust - Owner of Residential Properties - Dunedin | Duty to Trust may conflict with duties of Council Office  | Seek advice prior to the meeting if actual or perceived conflict of interest arises.                               |
|           | Shareholder  | Fonterra   | No conflict identified  | Seek advice prior to the meeting if actual or perceived conflict of interest arises.                               |
|           | Member   | Federated Farmers  | No conflict identified  | Seek advice prior to the meeting if actual or perceived conflict of interest arises.                               |
|           | Director   | Mosgiel Rotary Club  | No conflict identified  | Seek advice prior to the meeting if actual or perceived conflict of interest arises.                               |
|           | Member   | Mosgiel RSA  | No conflict identified  | Seek advice prior to the meeting if actual or perceived conflict of interest arises.                               |
|           | Member   | National Party   | No conflict identified  | Seek advice prior to the meeting if actual or perceived conflict of interest arises.                               |
|           | Chairperson  | Federated Farmers Charitable Trust                               | No conflict identified  | Seek advice prior to the meeting if actual or perceived conflict of interest arises.                               |
|           | Shareholder  | Various publicly listed companies                                | No conflict identified  | Seek advice prior to the meeting if actual or perceived conflict of interest arises.                               |

| Name         | Responsibility<br>(i.e. Chairperson etc) | Declaration of Interests                                | Nature of Potential Interest  | Member's Proposed Management Plan  |
|--------------|--|---|---|--|
|              | Chairperson                              | Otago Rural Support Trust                               | No conflict identified  | Seek advice prior to the meeting if actual or perceived conflict of interest arises.                               |
|              | Trustee                                  | Otago Youth Adventure Trust                             | No conflict identified  | Seek advice prior to the meeting if actual or perceived conflict of interest arises.                               |
|              | Member                                   | Strath Taieri Community Board (Council Appointment)     | No conflict identified  | Seek advice prior to the meeting if actual or perceived conflict of interest arises.                               |
|              | Member                                   | Hereweka Harbour Cone Trust (Council appointment)       | No conflict identified  | Seek advice prior to the meeting if actual or perceived conflict of interest arises.                               |
|              | Member                                   | District Licensing Committee (Council Appointment)      | No conflict identified  | Seek advice prior to the meeting if actual or perceived conflict of interest arises.                               |
| Jim O'Malley | Owner                                    | Biocentrix Ltd  | No conflict identified  | Seek advice prior to the meeting if actual or perceived conflict of interest arises.                               |
|              | Member                                   | Mosgiel Association Football Club                       | No conflict identified  | Seek advice prior to the meeting if actual or perceived conflict of interest arises.                               |
|              | Director                                 | Ocho Newco Limited                                      | No conflict identified  | Seek advice prior to the meeting if actual or perceived conflict of interest arises.                               |
|              | Owner                                    | Residential Property Dunedin                            | No conflict identified  | Seek advice prior to the meeting if actual or perceived conflict of interest arises.                               |
|              | Owner                                    | Ayrmed Limited  | No conflict identified  | Seek advice prior to the meeting if actual or perceived conflict of interest arises.                               |
|              | Member                                   | Ice Sports Dunedin                                      | No conflict identified  | Seek advice prior to the meeting if actual or perceived conflict of interest arises.                               |
|              | Member                                   | Dunedin Manufacturing Holdings                          | No conflict identified  | Seek advice prior to the meeting if actual or perceived conflict of interest arises.                               |
|              | Member                                   | Ice Sports Dunedin Incorporated (Council appointment)   | Potential grants recipient  | Withdraw from discussion and leave the table. If in confidential leave the room. Seek advice prior to the meeting. |
|              | Member                                   | Connecting Dunedin (Council appointment)                | No conflict identified  | Seek advice prior to the meeting if actual or perceived conflict of interest arises.                               |
|              | Member                                   | Okia Reserve Management Committee (Council appointment) | No conflict identified  | Seek advice prior to the meeting if actual or perceived conflict of interest arises.                               |
|              | Member                                   | Tertiary Precinct Planning Group (Council appointment)  | No conflict identified  | Seek advice prior to the meeting if actual or perceived conflict of interest arises.                               |
|              | Member                                   | Waikouaiti Coast Community Board (Council Appointment)  | No conflict identified  | Seek advice prior to the meeting if actual or perceived conflict of interest arises.                               |
| Jules Radich | Shareholder                              | Izon Science Limited                                    | No conflict identified  | Seek advice prior to the meeting if actual or perceived conflict of interest arises.                               |
|              | Shareholder                              | Taurikura Drive Investments Ltd                         | No conflict identified  | Seek advice prior to the meeting if actual or perceived conflict of interest arises.                               |
|              | Shareholder                              | Golden Block Developments Ltd                           | The Auditor General has issued a declaration under section 6(4) of LAMIA allowing Cr Radich to participate on the grounds that it is in the interests of the electors and inhabitants of the area that he be allowed to do so. The declaration applies to the Council meeting on 25 May 2020 and to discussion and deliberations on the Annual Plan 2020/21 up to and including the adoption of the Annual Plan | Seek advice prior to the meeting if actual or perceived conflict of interest arises.                               |
|              | Director                                 | Cambridge Terrace Properties Ltd                        | No conflict identified  | Seek advice prior to the meeting if actual or perceived conflict of interest arises.                               |

| Name          | Responsibility<br>(i.e. Chairperson etc) | Declaration of Interests  | Nature of Potential Interest  | Member's Proposed Management Plan   |
|---------------|--|---|---|---|
|               | Director/Shareholder                     | Southern Properties (2007) Ltd  | The Auditor General has issued a declaration under section 6(4) of LAMIA allowing Cr Radich to participate on the grounds that it is in the interests of the electors and inhabitants of the area that he be allowed to do so. The declaration applies to the Council meeting on 25 May 2020 and to discussion and deliberations on the Annual Plan 2020/21 up to and including the adoption of the Annual Plan | Seek advice prior to the meeting if actual or perceived conflict of interest arises.            |
|               | Director                                 | Golden Centre Holdings Ltd  | The Auditor General has issued a declaration under section 6(4) of LAMIA allowing Cr Radich to participate on the grounds that it is in the interests of the electors and inhabitants of the area that he be allowed to do so. The declaration applies to the Council meeting on 25 May 2020 and to discussion and deliberations on the Annual Plan 2020/21 up to and including the adoption of the Annual Plan | Seek advice prior to the meeting if actual or perceived conflict of interest arises.            |
|               | Director/Shareholder                     | IBMS Ltd  | No conflict identified  | Seek advice prior to the meeting if actual or perceived conflict of interest arises.            |
|               | Director/Shareholder                     | Raft Holdings Ltd   | No conflict identified  | Seek advice prior to the meeting if actual or perceived conflict of interest arises.            |
|               | Director/Shareholder                     | Otago Business Coaching Ltd   | No conflict identified  | Seek advice prior to the meeting if actual or perceived conflict of interest arises.            |
|               | Director                                 | Effectivise Ltd   | No conflict identified  | Seek advice prior to the meeting if actual or perceived conflict of interest arises.            |
|               | Director                                 | Athol Street Investments Ltd  | No conflict identified  | Seek advice prior to the meeting if actual or perceived conflict of interest arises.            |
|               | Director/Shareholder                     | Allandale Trustee Ltd   | No conflict identified  | Seek advice prior to the meeting if actual or perceived conflict of interest arises.            |
|               | Shareholder                              | Aberdeen St No2 Ltd   | No conflict identified  | Seek advice prior to the meeting if actual or perceived conflict of interest arises.            |
|               | Member                                   | Dunedin Public Art Gallery Acquisitions Committee (Council appointment) | No conflict identified  | Seek advice prior to the meeting if actual or perceived conflict of interest arises.            |
|               | Member                                   | Dunedin Public Art Gallery Society (Council appointment)                | No conflict identified  | Seek advice prior to the meeting if actual or perceived conflict of interest arises.            |
|               | Member                                   | Road Safety Action Plan   | No conflict identified  | Seek advice prior to the meeting if actual or perceived conflict of interest arises.            |
|               | 100% Shareholder/Director                | Panorama Developments Limited   | No conflict identified  | Seek advice prior to the meeting if actual or perceived conflict of interest arises.            |
|               | Member                                   | Tertiary Precinct Planning Group (Council appointment - alternate)      | No conflict identified  | Seek advice prior to the meeting if actual or perceived conflict of interest arises.            |
|               | Member                                   | Saddle Hill Community Board (Council appointment)                       | No conflict identified  | Seek advice prior to the meeting if actual or perceived conflict of interest arises.            |
| Chris Staynes | Chairman                                 | Cargill Enterprises   | Contractor and service provider to DCC  | Withdraw from discussion and leave the table. If the meeting is in confidential leave the room. |
|               | Director                                 | Wine Freedom  | Supplier to DCC   | Withdraw from discussion and leave the table. If the meeting is in confidential leave the room. |
|               | Patron                                   | Otago Model Engineering Society   | No conflict identified  | Seek advice prior to the meeting if actual or perceived conflict of interest arises.            |
|               | Member                                   | Balmacewen Lions Club   | No conflict identified  | Seek advice prior to the meeting if actual or perceived conflict of interest arises.            |

| Name          | Responsibility<br>(i.e. Chairperson etc) | Declaration of Interests  | Nature of Potential Interest  | Member's Proposed Management Plan  |
|---------------|--|---|---|--|
|               | Trustee                                  | Otago Southland Manufacturers Association Trust   | Possible co-funder of ED project. Duties to the Trust may conflict with duties of Council | Withdraw from discussion and leave the table. If the meeting is in confidential leave the room. Seek advice prior to the meeting.  |
|               | Life Member                              | Otago Chamber of Commerce   | No conflict identified  | Seek advice prior to the meeting if actual or perceived conflict of interest arises.   |
|               | Deputy Chair                             | Cancer Society of Otago/Southland   | No conflict identified  | Seek advice prior to the meeting if actual or perceived conflict of interest arises.   |
|               | Board Member                             | NZ Cancer Society   | No conflict identified  | Seek advice prior to the meeting if actual or perceived conflict of interest arises.   |
|               | Member                                   | Patearoa Golf Club  | No conflict identified  | Seek advice prior to the meeting if actual or perceived conflict of interest arises.   |
|               | President                                | Balmacewen Lions  | No conflict identified  | Seek advice prior to the meeting if actual or perceived conflict of interest arises.   |
|               | Trustee                                  | CJ and CA Staynes Family Trust - Property Owner - Dunedin and Patearoa  | No conflict identified  | Seek advice prior to the meeting if actual or perceived conflict of interest arises.   |
|               | Director                                 | George Street Wines Limited   | No conflict identified  | Seek advice prior to the meeting if actual or perceived conflict of interest arises.   |
|               | Director/Shareholder                     | Saddle Hill Investment Trust Limited  | No conflict identified  | Seek advice prior to the meeting if actual or perceived conflict of interest arises.   |
|               | Member                                   | NZ Association of Amateur Radio and Transmitters  | No conflict identified  | Seek advice prior to the meeting if actual or perceived conflict of interest arises.   |
|               | Board Member                             | Otago Museum Trust Board (Council appointment)  | Duties to Trust may conflict with duties of Council Office. Recipient of Council funding  | Withdraw from discussion and leave the table. If the meeting is in confidential, leave the room. Seek advice prior to the meeting. |
|               | Trustee                                  | Theomin Gallery Trust (Council appointment)   | Duties to Trust may conflict with duties of Council Office. Recipient of Council funding  | Withdraw from discussion and leave the table. If the meeting is in confidential, leave the room. Seek advice prior to the meeting. |
|               | Chairman                                 | Grow Dunedin Partnership (Council appointment)  | Duties may conflict with duties of Council Office. Recipient of Council funding           | Withdraw from discussion and leave the table. If the meeting is in confidential, leave the room. Seek advice prior to the meeting. |
|               | Member                                   | Dunedin Shanghai Association (Sister City Society) (Council appointment)  | Potential grants recipient  | Withdraw from discussion and leave the table. If the meeting is in confidential, leave the room. Seek advice prior to the meeting. |
|               | Trustee                                  | For Trades Apprenticeship Training Trust  | No conflict identified  | Seek advice prior to the meeting if actual or perceived conflict of interest arises.   |
|               | Member                                   | Social Well Being Advisory Group (Council appointment)  | No conflict identified  | Seek advice prior to the meeting if actual or perceived conflict of interest arises.   |
|               | Member                                   | Local Government New Zealand Zone 6 Committee (Council appointment)   | No conflict identified  | Seek advice prior to the meeting if actual or perceived conflict of interest arises.   |
| Lee Vandervis | Director                                 | Lee Vandervis, Antonie Alm-Lequeux and Cook Allan Gibson Trustee Company Ltd - Residential Property Ownership - Dunedin | No conflict identified  | Seek advice prior to the meeting if actual or perceived conflict of interest arises.   |
|               | Director                                 | Bunchy Properties Ltd - Residential Property Ownership - Dunedin  | No conflict identified  | Seek advice prior to the meeting if actual or perceived conflict of interest arises.   |
|               | Owner                                    | Vandervision Audio and Lighting - Hire, Sales and Service Business  | May contract and provide service to DCC   | Withdraw from discussion and leave the table. If the meeting is in confidential leave the room. Seek advice prior to the meeting.  |
| Steve Walker  | Chairperson                              | Dunedin Wildlife Hospital Trust   | Potential grants recipient  | Withdraw from discussion and leave the table. If the meeting is in confidential leave the room. Seek advice prior to the meeting.  |
|               | Chairperson                              | West Harbour Beautification Trust   | Potential conflict WHBT work with Parks and Reserves to co-ordinate volunteer activities  | Withdrawal from all West Harbour Beautification Trust/ DCC discussions involving this relationship.                                |

| Name          | Responsibility<br>(i.e. Chairperson etc) | Declaration of Interests   | Nature of Potential Interest                                | Member's Proposed Management Plan  |
|---------------|--|--|---|--|
|               | Member                                   | Orokonui Ecosanctuary  | Potential grants recipient                                  | Withdraw from discussion and leave the table. If the meeting is in confidential leave the room. Seek advice prior to the meeting.  |
|               | Member                                   | Port Chalmers Golf Club  | No conflict identified                                      | Seek advice prior to the meeting if actual or perceived conflict of interest arises.   |
|               | Member                                   | Keep New Zealand Beautiful   | Potential grants recipient                                  | Withdraw from discussion and leave the table. If the meeting is in confidential leave the room. Seek advice prior to the meeting.  |
|               | Member                                   | Society of Beer Advocates  | No conflict identified                                      | Seek advice prior to the meeting if actual or perceived conflict of interest arises.   |
|               | Member                                   | New Zealand Labour Party   | No conflict identified                                      | Seek advice prior to the meeting if actual or perceived conflict of interest arises.   |
|               | Member                                   | Port Chalmers Historical Society                                   | Potential grants recipient                                  | Withdraw from discussion and leave the table. If the meeting is in confidential leave the room. Seek advice prior to the meeting.  |
|               | Owner                                    | Residential Property - Dunedin                                     | No conflict identified                                      | Seek advice prior to the meeting if actual or perceived conflict of interest arises.   |
|               | Shareholder                              | Various publicly listed companies                                  | No conflict identified                                      | Seek advice prior to the meeting if actual or perceived conflict of interest arises.   |
|               | Member                                   | NZ Sea Lion Trust  | No conflict identified                                      | Seek advice prior to the meeting if actual or perceived conflict of interest arises.   |
|               | Member                                   | Dunedin Edinburgh Sister City Society (Council appointment)        | Potential grants recipient                                  | Withdraw from discussion and leave the table. If the meeting is in confidential, leave the room. Seek advice prior to the meeting. |
|               | Member                                   | Connecting Dunedin (Council appointment)                           | No conflict identified                                      | Seek advice prior to the meeting if actual or perceived conflict of interest arises.   |
|               | Member                                   | Te Ao Turoa Partnership (Council appointment)                      | No conflict identified                                      | Seek advice prior to the meeting if actual or perceived conflict of interest arises.   |
|               | Member                                   | Keep Dunedin Beautiful (Council appointment)                       | No conflict identified                                      | Seek advice prior to the meeting if actual or perceived conflict of interest arises.   |
|               | Member                                   | Tertiary Precinct Planning Group (Council appointment - alternate) | No conflict identified                                      | Seek advice prior to the meeting if actual or perceived conflict of interest arises.   |
|               | Member                                   | West Harbour Community Board (Council appointment)                 | No conflict identified                                      | Seek advice prior to the meeting if actual or perceived conflict of interest arises.   |
| Andrew Whiley | Owner/Operator                           | Whiley Golf Inc and New Zealand Golf Travel Ltd                    | No conflict identified                                      | Withdraw from discussion and leave the table. If the meeting is in confidential leave the room. Seek advice prior to the meeting.  |
|               | Director/Shareholder 22 May 2017         | Estate of Grace Limited  | No conflict identified                                      | Withdraw from discussion and leave the table. If the meeting is in confidential leave the room. Seek advice prior to the meeting.  |
|               | Trustee                                  | Japek (Family Trust) - Property Ownership - Dunedin                | Duties to Trust may conflict with duties of Council Office. | Withdraw from discussion and leave the table. If the meeting is in confidential, leave the room. Seek advice prior to the meeting. |
|               | Member                                   | Otago Golf Club  | No conflict identified                                      | Withdraw from discussion and leave the table. If the meeting is in confidential, leave the room. Seek advice prior to the meeting. |
|               | Member                                   | Dunedin South Rotary Club  | No conflict identified                                      | Seek advice prior to the meeting if actual or perceived conflict of interest arises.   |
|               | Board Member                             | New Zealand Professional Golfers Assn                              | No conflict identified                                      | Seek advice prior to the meeting if actual or perceived conflict of interest arises.   |
|               | Member                                   | Institute of Directors   | No conflict identified                                      | Seek advice prior to the meeting if actual or perceived conflict of interest arises.   |
|               | Member                                   | National Party   | No conflict identified                                      | Seek advice prior to the meeting if actual or perceived conflict of interest arises.   |

| Name | Responsibility<br>(i.e. Chairperson etc) | Declaration of Interests   | Nature of Potential Interest | Member's Proposed Management Plan  |
|------|--|--|------------------------------|--|
|      | Chairman                                 | Volunteering Otago   | No conflict identified       | Seek advice prior to the meeting if actual or perceived conflict of interest arises.   |
|      | Member                                   | Dunedin Otaru Sister City Society (Council appointment)            | No conflict identified       | Seek advice prior to the meeting if actual or perceived conflict of interest arises.   |
|      | Member                                   | Dunedin Public Art Gallery Society (Council appointment)           | Potential grants recipient   | Withdraw from discussion and leave the table. If the meeting is in confidential, leave the room. Seek advice prior to the meeting. |
|      | Member                                   | Grow Dunedin Partnership (Council appointment - alternate)         | Potential grants recipient   | Withdraw from discussion and leave the table. If the meeting is in confidential, leave the room. Seek advice prior to the meeting. |
|      | Member                                   | NZ Masters Games Trust Board (Council appointment)                 | Potential grants recipient   | Withdraw from discussion and leave the table. If the meeting is in confidential, leave the room. Seek advice prior to the meeting. |
|      | Deputy Chair                             | Dunedin Community House Executive Committee                        | Potential grants recipient   | Withdraw from discussion and leave the table. If the meeting is in confidential, leave the room. Seek advice prior to the meeting. |
|      | Member                                   | Puketai Residential Centre Liaison Committee (Council appointment) | No conflict identified       | Seek advice prior to the meeting if actual or perceived conflict of interest arises.   |
|      | Member                                   | Otago Peninsula Community Board (Council appointment)              | No conflict identified       | Seek advice prior to the meeting if actual or perceived conflict of interest arises.   |



## **CONFIRMATION OF MINUTES**

### **ECONOMIC DEVELOPMENT COMMITTEE MEETING - 9 FEBRUARY 2021**

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#### **RECOMMENDATIONS**

That the Committee:

- a) **Confirms** the public part of the minutes of the Economic Development Committee meeting held on 09 February 2021 as a correct record.

#### **Attachments**

|   | <b>Title</b>  | <b>Page</b> |
|---|---|-------------|
| <a href="#">A</a>  | Minutes of Economic Development Committee meeting held on 9 February 2021 | 18          |

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## **Economic Development Committee**

### **MINUTES**

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**Minutes of an ordinary meeting of the Economic Development Committee held in the Edinburgh Room, Municipal Chambers, The Octagon, Dunedin on Tuesday 09 February 2021, commencing at 1.37 pm**

#### **PRESENT**

|                           |                     |                      |
|---------------------------|---------------------|----------------------|
| <b>Chairperson</b>        | Cr Chris Staynes    |                      |
| <b>Deputy Chairperson</b> | Cr Rachel Elder     | Cr Andrew Whiley     |
| <b>Members</b>            | Cr Sophie Barker    | Cr David Benson-Pope |
|                           | Cr Christine Garey  | Cr Doug Hall         |
|                           | Mayor Aaron Hawkins | Cr Carmen Houlahan   |
|                           | Cr Marie Laufiso    | Cr Mike Lord         |
|                           | Cr Jim O'Malley     | Cr Jules Radich      |
|                           | Cr Lee Vandervis    | Cr Steve Walker      |

#### **IN ATTENDANCE**

Sandy Graham (Chief Executive Officer), John Christie (Director Enterprise Dunedin), Fraser Liggett (Economic Development Programme Manager), Malcolm Anderson (City Marketing Manager), Dougal McGowan (Economic Development Project Manager), Antony Deaker (Film Dunedin Coordinator, Enterprise Dunedin), Louise van der Vliet (Manager Visitors Centre), Suz Jenkins (Finance and Operations Manager), Benje Patterson (Business Analyst) and Margo Reid (Study Dunedin Coordinator),

|                                   |               |
|-----------------------------------|---------------|
| <b>Governance Support Officer</b> | Wendy Collard |
|-----------------------------------|---------------|

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#### **1 PUBLIC FORUM**

There was no Public Forum.

**2 APOLOGIES**

There were no apologies.

**3 CONFIRMATION OF AGENDA**

Moved (Cr Chris Staynes/Cr Andrew Whiley):

That the Committee:

**Confirms** the agenda without addition or alteration

**Motion carried (ED/2021/001)**

**4 DECLARATIONS OF INTEREST**

Members were reminded of the need to stand aside from decision-making when a conflict arose between their role as an elected representative and any private or other external interest they might have.

Moved (Cr Chris Staynes/Cr Rachel Elder):

That the Committee:

- a) **Notes** the Elected Members' Interest Register; and
- b) **Amends** the proposed management plan for Elected Members' Interests.

**Motion carried (ED/2021/002)**

**5 CONFIRMATION OF MINUTES**

**5.1 ECONOMIC DEVELOPMENT COMMITTEE MEETING - 19 OCTOBER 2020**

Moved (Cr Chris Staynes/Cr Steve Walker):

That the Committee:

- a) **Confirms** the public and confidential minutes of the Economic Development Committee meeting held on 19 October 2020 as a correct record.
- b) **Notes** that the confidential minutes were publicly released in November 2020.

**Motion carried (ED/2021/003)**

**PART A REPORTS**

**6 ECONOMIC DEVELOPMENT COMMITTEE FORWARD WORK PROGRAMME**

A report from Civic provided the forward work programme for the 2021 year

The Director, Enterprise Dunedin (John Christie) spoke to the report and responded to questions.

Moved (Cr Andrew Whiley/Cr Rachel Elder):

That the Committee:

- a) **Notes** the Economic Development Committee forward work programme.

**Motion carried (ED/2021/004)**

**7 ACTIONS FROM RESOLUTIONS OF ECONOMIC DEVELOPMENT COMMITTEE MEETINGS**

A report from Civic provided the open and completed actions from resolutions of Economic Development Committee meetings from the start of the triennium in October 2019.

The Director, Enterprise Dunedin (John Christie) spoke to the report and responded to questions.

Moved (Cr Andrew Whiley/Cr Chris Staynes):

That the Committee:

- a) **Notes** the Open and Completed Actions from resolutions of Economic Development Committee meetings.

**Motion carried (ED/2021/005)**

**8 ENTERPRISE DUNEDIN ACTIVITY REPORT - FEBRUARY 2021 UPDATE**

A report from Enterprise provided an update on Enterprise Dunedin activities.

The Economic Development Programme Manager (Fraser Liggett), the City Marketing Manager (Malcolm Anderson), Study Dunedin Coordinator (Margo Reid), the I-Site Manager (Louise Van der Vlied) and the Film Co-ordinator (Antony Deaker) spoke to the report and responded to questions.

Moved (Cr Rachel Elder/Cr Andrew Whiley):

That the Committee:

- a) **Notes** the Enterprise Dunedin Activity Report – February 2021 Update.

**Motion carried (ED/2021/006)**

**9 STRATEGIC TOURISM ASSETS PROTECTION PROGRAMME UPDATE**

A report from Enterprise Dunedin provided an update on the progress in implementation of the Strategic Tourism Assets Protection Programme (STAPP). The STAPP programme had been designed to support tourism businesses and Regional Tourism Organisations. It noted that decisions on funding allocations were made by the Tourism Recovery Ministers Group, supported by Ministry of Business, Innovation and Employment (MBIE) advice.

The report also noted that Enterprise Dunedin received \$700k + GST for the implementation of 15 individual programmes between November 2020 and March 2022.

The City Marketing Manager (Malcolm Anderson) spoke to the report and responded to questions.

Moved (Cr Andrew Whiley/Cr Rachel Elder):

That the Committee:

- a) **Notes** the Strategic Tourism Assets Protection Programme Update.

**Motion carried (ED/2021/007)**

The meeting concluded at 2.42 pm.

.....  
CHAIRPERSON

## **PART A REPORTS**

### **ACTIONS FROM RESOLUTIONS OF ECONOMIC DEVELOPMENT COMMITTEE MEETINGS**

Department: Civic

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#### **EXECUTIVE SUMMARY**

- 1 The purpose of this report is to detail the open and completed actions from resolutions of Economic Development Committee meetings from the start of the triennium in October 2019 (Attachment A and B).
- 2 As this report is an administrative report only, there are no options or Summary of Considerations.

#### **RECOMMENDATIONS**

That the Committee:

- a) **Notes** the Open and Completed Actions from resolutions of Economic Development Committee meetings shown in Attachment A and B.

#### **DISCUSSION**

- 3 This report provides an update on resolutions that have been actions and completed since the last Economic Development Committee meeting.

#### **NEXT STEPS**

- 4 An updated actions report will be provided at all Economic Development Committee meetings.

#### **Signatories**

|             |  |
|-------------|--|
| Author:     | Wendy Collard - Governance Support Officer |
| Authoriser: | Clare Sullivan - Manager Governance        |

#### **Attachments**

|                    | <b>Title</b>      | <b>Page</b> |
|--------------------|-------------------|-------------|
| <a href="#">↗A</a> | Open Actions      | 23          |
| <a href="#">↗B</a> | Completed Actions | 24          |

| PUBLIC OPEN ACTIONS - ECOMONIC DEVELOPMENT COMMITTEE RESOLUTIONS 2019-2022 |             |  |  |                    |              |  |
|--|-------------|--|--|--------------------|--------------|--|
| Meeting Date   | Resolution  | Report                                       | Resolution or Action to be Taken   | Group              | Due Date     | Status   |
| 31 August 2020   | ED/2020/013 | Grow Dunedin Partnership Implementation Plan | A report to be provided which outlined a statement of priorities to be presented annually. | Enterprise Dunedin | 30 June 2021 | A report is being presented to the 21 June 2021 Economic Development Committee Meeting |
| 19 October 2020  | ED/2020/020 | Study Dunedin - Dunedin Summer Programme     | A report to be presented on the Dunedin Summer Programme upon its completion.              | Enterprise Dunedin | 30 June 2021 | A report is being presented to the 21 June 2021 Economic Development Committee Meeting |

| PUBLIC COMPLETED ACTIONS - ECOMONIC DEVELOPMENT COMMITTEE RESOLUTIONS 2019-2022 |             |                          |   |                    |                  |   |                  |
|---|-------------|--------------------------|---|--------------------|------------------|---|------------------|
| Meeting Date  | Resolution  | Report                   | Resolution or Action to be Taken  | Group              | Due Date         | Status  | Date Completed   |
| 15 June 2020  | ED/2020/007 | StartUp Ecosystem        | A report to be presented to Council for approval of the new DCC representative to the StartUp Dunedin Trust (SUDT)                          | Enterprise Dunedin | 28 February 2021 | A report will be presented to the Council meeting in February 2021 to approve the DCC representative to the SUDT. | 23 February 2021 |
| 19 October 2020   | ED/2020/019 | Study Dunedin Transition | A report to be presented on the development of a strategic action plan and include roll out changes and developments for the next two years | Enterprise Dunedin | 30 June 2021     | This has been scheduled into the Forward Work Programme for the Economic Development Committee.                   | 15 June 2021     |



## **ECONOMIC DEVELOPMENT COMMITTEE FORWARD WORK PROGRAMME**

Department: Civic

### **EXECUTIVE SUMMARY**

- 1 The purpose of this report is to provide the forward work programme for the 2021-2022 year (Attachment A).
- 2 As this is an administrative report only, there are no options or Summary of Considerations.

### **RECOMMENDATIONS**

That the Committee:

- a) **Notes** the Economic Development Committee forward work programme as shown in Attachment A.

### **NEXT STEPS**

- 3 An updated report will be provided to future meetings of the Economic Development Committee.

### **Signatories**

|             |  |
|-------------|--|
| Author:     | Wendy Collard - Governance Support Officer |
| Authoriser: | Clare Sullivan - Manager Governance        |

### **Attachments**

|                   | <b>Title</b>  | <b>Page</b> |
|-------------------|---|-------------|
| <a href="#">A</a> | Economic Development Committee Forward Work Programme | 27          |



| Key                                |             |
|------------------------------------|-------------|
| New item                           |             |
| Changes to timeframes              |             |
| Completed; progress to date update | <b>Bold</b> |

| Economic Development Committee<br>Forward Work Programme 2021 - June 2021 |   |  |                     |     |        |      |        |     |     |     |     |     |     |     |
|---|---|--|---------------------|-----|--------|------|--------|-----|-----|-----|-----|-----|-----|-----|
| Area of Work  | Reason for Work   | Council role<br>(decision and/or direction)  | Expected timeframes |     |        |      |        |     |     |     |     |     |     |     |
|   |   |  | Jun                 | Jul | Aug    | Sept | Oct    | Nov | Dec | Jan | Feb | Mar | Apr | May |
| Enterprise Dunedin Activity Report  | To update the Committee on key Economic Development Strategy Activities                                     | Noting the Non-Financial Activity Report.<br><br><b>Progress to date:</b><br><i>Quarterly reporting to the Committee.</i>  | Noting              |     | Noting |      | Noting |     |     |     |     |     |     |     |
| Study Dunedin Education Update Report                                     | To update the Committee on Study Dunedin Activities   | Noting the Study Dunedin Education Report.<br><br><b>Progress to date:</b><br><i>Bi-annual reporting to Committee.</i>   | Noting              |     |        |      |        |     |     |     |     |     |     |     |
| Outstanding Actions   | Report on status of outstanding actions arising from resolutions pass at the Economic Development Committee | Noting the outstanding actions and progress towards their completion.<br><br><b>Progress to date:</b><br><i>This report will be presented to each Economic Development Committee meeting</i> | Noting              |     | Noting |      | Noting |     |     |     |     |     |     |     |
| Start Up Dunedin Trust Report   | To update the Committee on the Start Up Dunedin Trust Activities  | Noting the Start Up Dunedin Trust Report<br><br><b>Progress to date:</b><br><i>Annually</i>  |                     |     | Noting |      |        |     |     |     |     |     |     |     |
| Central of Digital Excellence (CODE) Update Report                        | To update the Committee on CODE activities  | Noting the CODE Update Report<br><br><b>Progress to date:</b><br><i>Bi-annual reporting to the Council</i>   |                     |     |        |      | Noting |     |     |     |     |     |     |     |
| Dunedin Destination Plan  | To update the current Dunedin Destination Plan in align with the current city requirement                   | To adopt the updated Dunedin Destination Plan<br><br><b>Progress to date:</b><br><i>Underway - public engagement and consultation has been undertaken</i>                                    |                     |     |        |      | Noting |     |     |     |     |     |     |     |

| Area of Work   | Reason for Work   | Council role<br>(decision and/or direction)  | Expected timeframes |     |     |      |        |     |     |     |     |     |     |     |
|--|---|--|---------------------|-----|-----|------|--------|-----|-----|-----|-----|-----|-----|-----|
|  |   |  | Jun                 | Jul | Aug | Sept | Oct    | Nov | Dec | Jan | Feb | Mar | Apr | May |
| Strategy Tourism Assets Protection Programme (STAPP) Update Report | To provide an update to the Committee on the allocation of the Government Funding   | Noting the STAPP update<br><br><b>Progress to date:</b><br><i>Report in the current agenda</i>                             | Noting              |     |     |      |        |     |     |     |     |     |     |     |
| Sister City and International Update Report                        | To provide an update to the Committee on Sister City and International Activities   | Noting the Sister City Update Report<br><br><b>Progress to date:</b><br><i>To be progressed</i>                            |                     |     |     |      | Noting |     |     |     |     |     |     |     |
| Dunedin City - Annual Economic Profile                             | To provide an update to the Committee on the progress against the 2013-2023 Economic Development Strategy                       | Noting the Dunedin City - Annual Economic Profile<br><br><b>Progress to date:</b><br><i>To be progressed</i>               | Noting              |     |     |      |        |     |     |     |     |     |     |     |
| Construction Skills Labour Force Work Report                       | To provide an update to the Committee on the assessment of the labour force market in Otago against known construction projects | Noting the Construction Skills Labour Force Work Report<br><br><b>Progress to date:</b><br><i>To be progressed</i>         |                     |     |     |      | Noting |     |     |     |     |     |     |     |
| Grow Dunedin Partnership   | To update the Committee on the Grow Dunedin Partnership Activities  | Noting the Grow Dunedin Partnership Report<br><br><b>Progress to date:</b><br><i>Bi-annual reporting to the Committee.</i> | Noting              |     |     |      | Noting |     |     |     |     |     |     |     |

|

## **GROW DUNEDIN PARTNERSHIP JUNE 2021 UPDATE**

Department: Enterprise Dunedin

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### **EXECUTIVE SUMMARY**

- 1 The purpose of this report is to update the Economic Development Committee (EDC) on Grow Dunedin Partnership (the Partnership) activity. The update, report and attachments are being presented on behalf of the Partnership by Chair, John Gallaher and Deputy Chair, David Thomson (University of Otago).
- 2 In summary:
  - a) An independent Chair, John Gallaher was appointed in October 2020;
  - b) Two independent Board members were appointed to the Partnership in March 2021;
  - c) An independent report has been commissioned to benchmark Dunedin with other New Zealand cities, based on the Economic Development Strategy 2013-2023 (the Strategy) measures;
  - d) The Partnership has developed an Implementation Plan for 2021/22.

### **RECOMMENDATIONS**

That the Committee:

- a) **Notes** the June 2021 Grow Dunedin Partnership Update Report
- b) **Notes** the May 2021 Dunedin Benchmarking Report
- c) **Notes** the Grow Dunedin Partnership Implementation Plan 2021/22.

### **BACKGROUND**

- 3 The Partnership was established in 2012 to lead the city's delivery of the Economic Development Strategy 2013-2023.
- 4 The Strategy sets out two economic goals:
  - a) 10,000 extra jobs over 10 years (requiring approximately 2% per annum); and
  - b) An average of 10,000 of extra income for each person (requiring GDP per capital to raise 2.5% per annum).

## DISCUSSION

- 5 The Partnership has implemented the following actions over the last 12 months:
- a) The terms of reference have been reviewed and refreshed. These were approved by Council in September 2020 and the individual Partners;
  - b) An independent Chair, John Gallaher was appointed in October 2020;
  - c) A recruitment process for independent representatives on the Partnership was undertaken by John Gallaher, David Thomson and Councillor Chris Staynes which resulted in the following appointments in March 2021:
    - Barbara Bridger, Chief Executive, Otago Community Trust;
    - Jason Tibble, Regional Commissioner & Chair of Regional Public Service, Ministry of Social Development;
  - d) Benje Patterson Ltd was engaged in April 2021 to benchmark Dunedin with other New Zealand cities based on the measures in the Strategy (Attachment A);
  - e) A 2021/22 Implementation Plan has been developed (Attachment B).

## OPTIONS

- 6 As this is a report for noting, there are no options.

## NEXT STEPS

- 7 The Partnership will provide further updates on the Strategy and outcomes to EDC. These reports will be noted in the EDC forward work programme.

## Signatories

|             |   |
|-------------|---|
| Author:     | Fraser Liggett - Economic Development Programme Manager |
| Authoriser: | John Christie - Manager Enterprise Dunedin              |

## Attachments

|                    | <b>Title</b>   | <b>Page</b> |
|--------------------|--|-------------|
| <a href="#">↓A</a> | Dunedin Benchmarking Report - May 2021               | 33          |
| <a href="#">↓B</a> | Grow Dunedin Partnership Implementation Plan 2021/22 | 41          |

**SUMMARY OF CONSIDERATIONS**
***Fit with purpose of Local Government***

This decision promotes the economic well-being of communities in the present and for the future.

***Fit with strategic framework***

|   | Contributes                         | Detracts                 | Not applicable                      |
|---|-------------------------------------|--------------------------|-------------------------------------|
| Social Wellbeing Strategy               | <input type="checkbox"/>            | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| Economic Development Strategy           | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>            |
| Environment Strategy                    | <input type="checkbox"/>            | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| Arts and Culture Strategy               | <input type="checkbox"/>            | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| 3 Waters Strategy                       | <input type="checkbox"/>            | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| Spatial Plan                            | <input type="checkbox"/>            | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| Integrated Transport Strategy           | <input type="checkbox"/>            | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| Parks and Recreation Strategy           | <input type="checkbox"/>            | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| Other strategic projects/policies/plans | <input type="checkbox"/>            | <input type="checkbox"/> | <input checked="" type="checkbox"/> |

The Grow Dunedin Partnership Implementation Plan aligns with the strategic delivery of the Economic Development Strategy 2013-2023.

***Māori Impact Statement***

Ngai Tahu is a partner of the Grown Dunedin Partnership. Engagement with Rūnaka will be undertaken throughout the development and delivery of the Grow Dunedin Partnership Implementation Plan projects.

***Sustainability***

Sustainability will feature as a key component for development of all projects identified in the Grow Dunedin Partnership Implementation Plan.

***LTP/Annual Plan / Financial Strategy /Infrastructure Strategy***

Council supports contribution for the delivery of the Economic Development Strategy through Enterprise Dunedin's operational budgets. Other partners will contribute to the delivery of the Implementation Plan via their own organisations.

***Financial considerations***

There are no known financial implications and delivery of the projects will be assessed by the Partnership.

***Significance***

This decision is considered low in terms of the Council's Significance and Engagement Policy.

***Engagement – external***

External engagement has been undertaken with the Grow Dunedin Partners and their representatives e.g. Otago Chamber of Commerce, Otago Polytechnic, Otago Southland Employers Association, University of Otago; and independent Board members from Forsyth Barr Ltd, Otago Community Trust, Ministry of Social Development.

## SUMMARY OF CONSIDERATIONS

### ***Engagement - internal***

There has been no internal engagement.

### ***Risks: Legal / Health and Safety etc.***

There are no known risks; however, risk assessments will be undertaken when planning the Grow Dunedin Partnership Implementation projects.

### ***Conflict of Interest***

There are no known conflicts of interest.

### ***Community Boards***

Engagement with Community Boards will be undertaken as relevant to the Grow Dunedin Partnerships Implementation Projects.





May 2021

# Dunedin benchmark comparisons with other New Zealand cities



Report by Benje Patterson, Economist  
Benje Patterson | People & Places  
[www.benjepatterson.co.nz](http://www.benjepatterson.co.nz)  
May 2021

Report prepared for: Grow Dunedin  
Partnership

Dunedin benchmark comparisons with other New Zealand cities 1

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Dunedin benchmark comparisons with other New Zealand cities 2

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Dunedin benchmark comparisons with other New Zealand cities 3

## Introduction

This report has been prepared for the Grow Dunedin Partnership to provide benchmark comparisons of Dunedin against other New Zealand cities. The benchmark measures that have been analysed are based on those identified in Dunedin's Economic Development Strategy 2013-2023 (EDS).

## Context

Dunedin's EDS was set against twin economic goals of 10,000 additional jobs and \$10,000 of extra income over 10 years, alongside a vision that:

"Dunedin will be one of the world's great small cities. It will be known as a confident, competitive knowledge centre, where enterprise and creativity support a productive and sustainable city."

To achieve this vision and economic goals, the EDS determined that there would be several intermediate benchmarks of success. These benchmarks are listed in the following table:

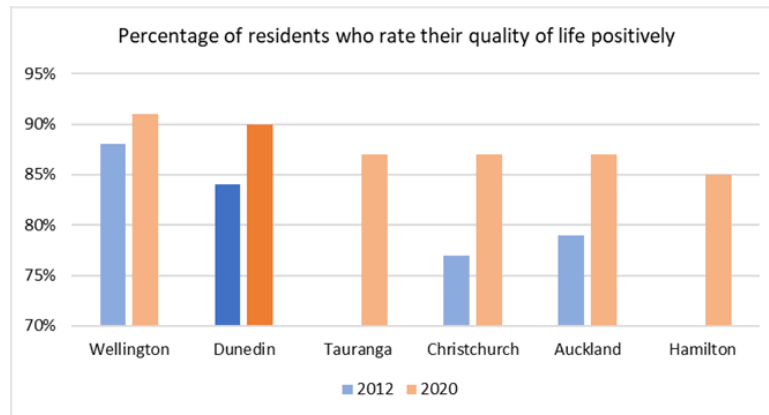
|  |   |
|--|---|
| <b>Dunedin residents rate their quality of life the highest in New Zealand.</b>  | Quality of life has been identified in research as a key driver of urban competitiveness, and is associated with attracting talent and investment.  |
| <b>Dunedin has the highest proportion of the adult population with education qualifications, when benchmarked against comparator cities.</b> | There are strong interdependencies between the attainment of formal education and opportunities in the labour market. Formal education encourages the on-going development of skills that can be applied in the economy, contributing to a productive and competitive workforce.    |
| <b>Dunedin's export growth exceeds the national average over 10 years.</b>   | <b>Exports are critical to economic growth and prosperity. Exporting allows businesses to take advantage of scale economies and incentivises innovation and productivity improvements.</b>  |
| <b>Dunedin has the highest proportion of workers employed in knowledge intensive industries, when benchmarked against comparator cities.</b> | The pool of distinctive skills available to undertake specialist functions within a city-region is a key driver of innovation and growth.   |
| <b>Dunedin's proportion of high growth businesses exceeds the national average.</b>  | High growth businesses are not only important because they grow themselves but because they contribute to competition and productive churn in the economy, i.e., they replace less efficient businesses or stimulate existing businesses to innovate and improve their performance. |
| <b>Enterprise start-up rates exceed those of comparator cities.</b>  | Business entry gives an indication of the availability and uptake of business opportunities. Start-up rates are regarded as an indicator of entrepreneurship in the economy and the ease of establishing businesses.  |

Dunedin benchmark comparisons with other New Zealand cities 4

## Benchmark summaries

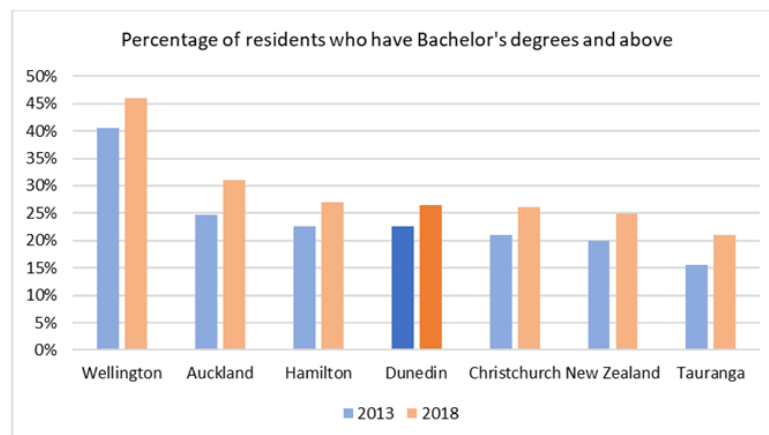
Benchmark comparisons have been made against Auckland, Hamilton, Tauranga, Wellington and Christchurch. Comparisons have been made between the most recent data available as at May 2021 and historical data from as close as possible to when the EDS came into force in 2013.

### Quality of life



In 2020, 90% of Dunedin residents responding to the Quality of Life survey rated their quality of life as good or better. By comparison 84% of Dunedin residents rated their quality of life as good or better in 2012. Dunedin was the second-ranked city for overall quality of life in 2020, behind Wellington.

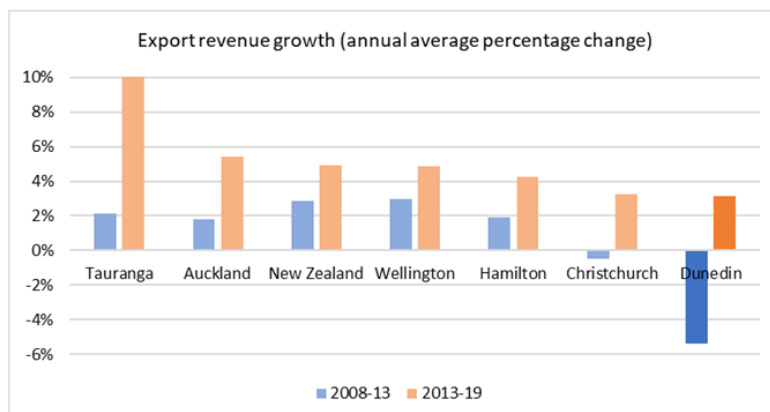
### Residents who have Bachelor's degrees and above



At the 2018 Census, 26% of Dunedin residents had at least a Bachelor's degree qualification, compared to 23% at the 2013 Census. Dunedin was the fourth-ranked city for percentage of residents who have Bachelor's degrees and above, behind Wellington, Auckland, and Hamilton.

Dunedin benchmark comparisons with other New Zealand cities 5

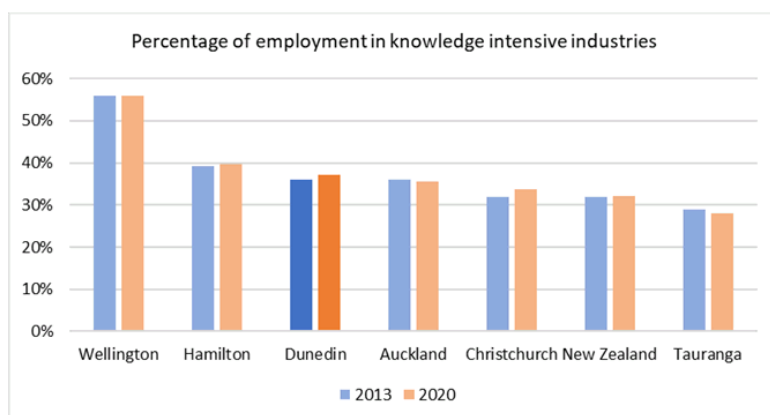
## Dunedin's export revenue growth



Export data has been sourced from estimates contained in Infometrics 2019 Dunedin City Economic Profile. Dunedin's export revenue fell sharply from 2008 to 2013, declining by an average of 5.4%pa. Since 2013 there has been a turnaround in Dunedin's export revenues, which have risen by an average of 3.2%pa.

Dunedin was the last ranked city for export revenue growth between 2013 and 2019, however, the gap between Dunedin and third-placed Wellington was only just over 1%pa.

## Employment in knowledge intensive industries



In 2020, Dunedin was estimated by Infometrics to have 37.3% of employment in knowledge intensive industries, compared to 36.0% of employment in 2013.

Dunedin was the third-ranked city for percentage of residents employed in knowledge intensive industries, behind Wellington and Hamilton.

Dunedin benchmark comparisons with other New Zealand cities 6

## Growing businesses

The EDS identified two benchmarks that relate to business growth: the number of start-ups and the number of high growth businesses. No appropriate data is available to support an understanding of how high growth businesses have evolved since 2013, but we can gain an understanding of entrepreneurial pursuit by examining the number of start-up enterprises. These insights are derived from Statistics New Zealand's Business Demography data.



The above chart shows that Dunedin's entry rate of new businesses rose from 8.6% in 2013 to 9.4% in 2020. Nevertheless, Dunedin still lagged its city peers, suggesting that residents remain relatively reluctant entrepreneurs compared to other urban areas.










## GDP Implementation Plan – 2021/22

















The Grow Dunedin Partners (GDP) Implementation Plan has been designed to prioritise action for the partners of the Economic Development Strategy (EDS). The EDS was developed collaboratively by the Dunedin City Council, Otago Chamber of Commerce, Ngai Tahu, Otago/ Southland Employers Association, The University of Otago and Otago Polytechnic. Projects included in the plan have been identified to have strong alignment with the themes from the EDS and Enterprise Dunedin's Business Plan.





















### Implementation Plan opportunities:

1. To engage and partner with Runaka to give effect to Te Tiriti o Waitangi in GDP activities and outcomes;
2. To progress and communicate our strategic response to current economic challenges;
3. To align and prioritise initiatives that deliver outcomes beyond what we are already and/or planning on doing;
4. To seek investment which builds on and scale up existing initiatives;
5. To align the proposed implementation plan with our regional economic development strategy and framework;
6. To champion, support and promote the plan and activities within each partner organisation and wider Dunedin community.

**A**

| EDS themes: Priority areas for change that will help us meet our objectives                                |   |   |   |   |
|--|---|---|---|---|
|  Alliance for innovation  |  Business Vitality |  A Hub for Skills and Talent |  Linkages Beyond our Borders |  A Compelling Destination  |
| Improve linkages between industry and research.<br><br>Increase scale in innovation and tradeable sectors. | Improve ease of doing business.<br><br>Grow the value of exports.                                   | Increase retention of graduates.<br><br>Build the skills base.<br><br>Grow Migrant numbers.                     | Increase international investment.<br><br>Establish strategic projects with other cities.                       | Enhance the city centre and environs.<br><br>Increase the value derived from tourism and events.<br><br>Improve an awareness and opportunities of Dunedin's advantages. |

| Our initiatives (projects/proposals that are strategically aligned)                |   |   |   |   |   |   |
|--|---|---|---|---|---|---|
| On-going projects: <i>Priority projects for 2021/22:</i>                           |   |   |   |   | Success Measures  |   |
|  |  |  |  |  | <b>Economic Development Strategy</b> – Support the review of the Dunedin Economic Development Strategy.   | In collaboration with the Dunedin City Council, the EDS review is aligned to the Thriving Cities Framework.   |
|  |  |  |   |   | <b>CODE</b> (New Zealand Centre of Digital Excellence) - A Dunedin-based initiative intended to enable the development of a \$1bn video game industry over ten years. CODE has the potential to connect gaming professionals through the development of Centre of Vocational Excellence (COVE) and apply games technology to serious issues such as health. | Implementation of CODE is completed, and new entity is established by 31 December 2021.   |
|  |  |  |  |  | <b>Otago Regional Economic Development</b> – Support focussed and productive long-term collaboration between Otago Councils, including the identification and progression of economic development activities and projects which align with their individual strategic priorities and provide regional benefits.   | Initial partnership programme phase is completed by June 2022.  |
|  |  |  |   |   | <b>Start-up Ecosystem</b> – Investment, support and continuing development of Dunedin’s start-up, technology, innovation ecosystem through access to talent, internships, business support and coordination.  | Support ongoing commitment and investment by shareholders (University of Otago, Otago Polytechnic and Dunedin City Council) in Start-up Dunedin activities. |

|  |   |   |   |   |  |  |
|--|---|---|---|---|--|--|
|  |   |  |  |   | <b>International Relations</b> – Leverage off Dunedin’s sister city relationships such as Shanghai (plus other city agreements) to identify two-way trade and investment opportunities (including for talent and education). Assess the extent to which our connections with political (China) plus business interests (for instance JPGames/Japan) can benefit Dunedin businesses.  | Review and implementation of the Memo Of Understanding schedule.   |
|  |   |  |  |  | <b>Export Education</b> – International education has the potential to provide significant economic and social value to Dunedin and be incorporated into destination marketing activities. Ability to create partnerships that are mutually beneficial.  | Achieve contribution from Export Education of \$20m to Dunedin’s economy. <i>(Based on approx. \$200m value and of 10% of market).</i> |
| <b>Developmental projects</b> <i>Priority projects for 2021/22:</i>              |   |   |   |   |  | <b>Success Measures</b>  |
|  |  |  |   |   | <b>Games for Health</b> – The CODE business case identified opportunities to develop and apply games technology to health issues. Southern District Health Board’s \$1.4b health transformation programme, along with the University of Otago and Otago Polytechnic provides an opportunity to develop a niche for games for health. This provides the ability to combine health with the start up sector, then research the outcomes. | Development of business case and advice for Games for Health by 30 June 2022.  |
|  |  |  |   |   | <b>Skills /Labour force attraction</b> – With \$3.3 bn investment over the next 10 years in capital investment, there is an opportunity to enable economic benefits for Dunedin residents. There is a need to match training and education with skills need for Dunedin (current and future).  | Collaboration between government agencies MBIE/MSD and GDP Partners to explore opportunities.  |
|  |  |   |  |  | <b>Export logistics</b> - One major challenge for our primary sector, which can also be viewed as an opportunity, is the speed/effectiveness to which our high-quality perishable goods can get to market. A collaborative approach is critical to create the scale required to change this.   | Complete research into primary sector volumes in Otago and Southland by 31 December 2021.  |
|  |  |   |  |  | <b>Dunedin Destination Plan</b> - Rewrite the 2017 Dunedin Destination Plan to implement a Dunedin Inc approach to both Destination Marketing and Management of the City.  | Complete the review and development of the new Dunedin Destination Plan by 30 June 2022.   |

## DUNEDIN CITY - ANNUAL ECONOMIC PROFILE UPDATE

Department: Enterprise Dunedin

### EXECUTIVE SUMMARY

- 1 The purpose of this report is to provide the Economic Development Committee with an update of progress against the 2013-2023 Economic Development Strategy goals and an overview of the Dunedin economy.
- 2 Calculations in this report draw on detailed data in the Infometrics Annual Economic Profile (to March 2020) and more recent Statistics New Zealand estimates (to March 2021) based on payroll tax filings.

### RECOMMENDATIONS

That the Committee:

- a) **Notes** the Dunedin City – Annual Economic Profile Update report.

### BACKGROUND

- 3 Enterprise Dunedin activity is informed by the 2013-23 Economic Development Strategy (EDS). The EDS is underpinned by five themes:
  - a) Business vitality – to improve the ease of doing business.
  - b) Alliances for innovation – to improve linkages between industry and research.
  - c) A hub for skills and talent – to increase retention of graduates, build the skills base and grow migrant numbers.
  - d) Linkages beyond our borders – to increase international investment and establish projects with other cities.
  - e) A compelling destination – to increase the value of tourism and events and improve the understanding of Dunedin's advantages.
- 4 The EDS sets out two overarching economic goals:
  - 10,000 extra jobs over 10 years.
  - An average \$10,000 extra income for each person.

## DISCUSSION

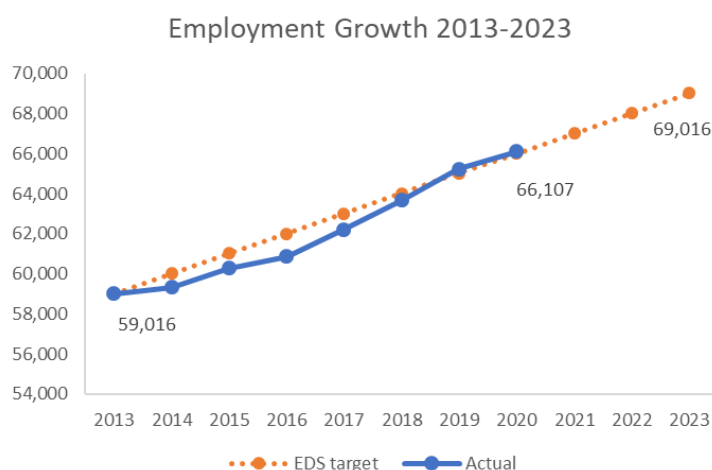
### Progress of the EDS goals to March 2020

- 5 The following table shows an update of key economic performance measures that cover those summarised in the 2013-23 EDS.
- 6 Insights presented in the table are based on calculations from data in the Infometrics Annual Economic Profile.
- 7 The data in the Annual Economic Profile is to March 2020. To supplement this information with more recent information (to March 2021), payroll filings data from Statistics New Zealand has also been analysed and presented later in this report.

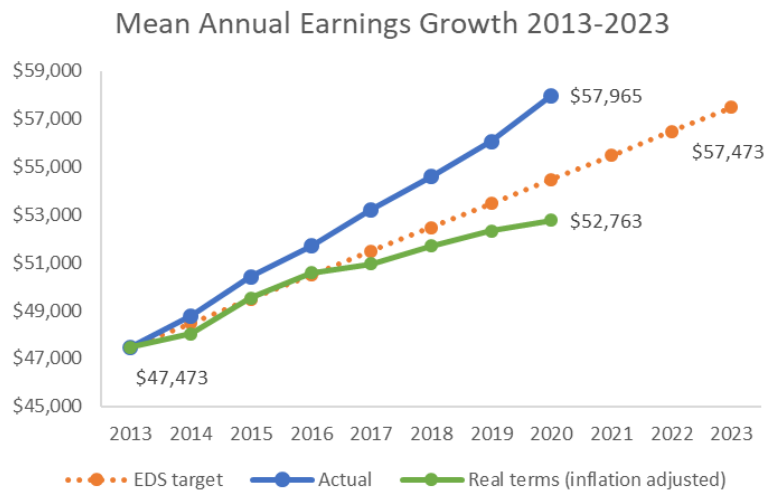
|   | Level    |          |           | Average annual growth |         |
|---|----------|----------|-----------|-----------------------|---------|
|   | 2003     | 2013     | 2020      | 2003-13               | 2013-20 |
| GDP (2020 pricing, \$m)                   | \$5,161  | \$5,604  | \$6,715   | 0.8%                  | 2.6%    |
| GDP per capita (2020 pricing)             | \$42,688 | \$45,377 | \$50,075  | 0.6%                  | 1.4%    |
| Household income (mean)                   | \$38,292 | \$63,140 | \$82,773  | 5.1%                  | 3.9%    |
| Employment earnings (mean per filled job) | \$31,785 | \$47,473 | \$57,965  | 4.1%                  | 2.9%    |
| Population                                | 120,900  | 123,500  | 134,100   | 0.2%                  | 1.2%    |
| Employment (filled jobs)                  | 56,728   | 59,016   | 66,107    | 0.4%                  | 1.6%    |
| Productivity (GDP per job, 2020 pricing)  | \$90,980 | \$94,965 | \$101,582 | 0.4%                  | 1.0%    |

Source: Infometrics, ED calculations

- 8 Jobs in Dunedin increased by 7,091 over the seven years to March 2020, compared to an employment expansion of just 2,288 jobs in the decade prior to the implementation of the 2013-2023 EDS.



- 9 The following chart highlights that in inflation adjusted terms, average wage earnings growth is tracking just below what is needed to lift incomes by \$10,000 per person over the EDS 10-year period.



### Employment and wage trends since COVID-19

- 10 Dunedin's overall economy has remained resilient since the COVID-19 lockdown in March 2020.
- 11 Data from Statistics New Zealand, based on payday payroll filings, shows that job numbers in Dunedin during March 2021 were on par with a year ago (0.0% growth).
- 12 From an industry perspective, job numbers are continuing to expand particularly strongly within health, construction, and public administration, while there have also been gains to finance and agriculture. These growth trends are consistent with higher levels of public spending, population growth, and increasing building consents data.
- 13 Growth industries have offset declines within retail, transport and warehousing, manufacturing, administrative support, rentals and hiring, media, hospitality, and arts and recreational activities (which capture many visitor attractions).
- 14 The payroll data also gives insight as to what has happened to wages. The data shows that wages across the March 2021 year averaged \$59,239, compared to average wages of \$57,965 in the March 2020 year prior to the COVID-19 pandemic.
- 15 Despite overall job numbers and earnings data holding, there were still vulnerable groups who have missed out. Detailed demographic insight from MSD Jobseeker Benefits data highlights that youth and Pasifika have been disproportionately affected, as have women.
- 16 The emergence of migration from New Zealand's biggest cities into regional centres including Dunedin, is also expected to continue.

### OPTIONS

- 17 As this is an update report, there are no options.

### NEXT STEPS

- 18 Further reports will be commissioned to monitor Dunedin's Economic Growth and progress against the EDS goals.

- 19 Enterprise Dunedin has commissioned Infometrics to provide an early update of its economic profile to March 2021 to take into consideration the impacts of COVID-19, and this report will be received later in 2021.

**Signatories**

|             |   |
|-------------|---|
| Author:     | Benje Patterson - Business Analysis Contractor<br>Fraser Liggett - Economic Development Programme Manager |
| Authoriser: | John Christie - Manager Enterprise Dunedin  |

**Attachments**

|                    | <b>Title</b>                             | <b>Page</b> |
|--------------------|--|-------------|
| <a href="#">↓A</a> | Infometrics 2020 Annual Economic Profile | 48          |

**SUMMARY OF CONSIDERATIONS**
***Fit with purpose of Local Government***

This report shows the economic well-being of communities in the present and for the future.

***Fit with strategic framework***

|   | Contributes                         | Detracts                 | Not applicable                      |
|---|-------------------------------------|--------------------------|-------------------------------------|
| Social Wellbeing Strategy               | <input type="checkbox"/>            | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| Economic Development Strategy           | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>            |
| Environment Strategy                    | <input type="checkbox"/>            | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| Arts and Culture Strategy               | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>            |
| 3 Waters Strategy                       | <input type="checkbox"/>            | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| Spatial Plan                            | <input type="checkbox"/>            | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| Integrated Transport Strategy           | <input type="checkbox"/>            | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| Parks and Recreation Strategy           | <input type="checkbox"/>            | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| Other strategic projects/policies/plans | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>            |

Enterprise Dunedin is responsible for the delivery of the 2013-2023 Economic Development Strategy.

***Māori Impact Statement***

There are no known impacts for tangata whenua.

***Sustainability***

There are no known impacts for sustainability.

***LTP/Annual Plan / Financial Strategy /Infrastructure Strategy***

Enterprise Dunedin activities and delivery on the 2013-2023 Economic Development Strategy are included in the 2018-2018 Long Term Plan.

***Financial considerations***

There are no identified financial considerations.

***Significance***

This report is considered of low significance in terms of the Significance Engagement Policy.

***Engagement – external***

Infometrics Ltd were engaged to provide the annual Regional Economic Profile Report.

***Engagement – internal***

No internal engagement has been undertaken.

***Risks: Legal / Health and Safety etc.***

There are no known identified risks.

***Conflict of Interest***

There are no known conflicts of interest.

***Community Boards***

There are no known implications for Community Boards.



## Dunedin City





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## ECONOMY

### The New Zealand economy in 2020

Economic growth in New Zealand slowed to 1.8% over the March 2020 year, following revised 3.1%pa growth in 2019. The March 2020 year captures only the very early stages of the COVID-19 pandemic, which occurred during the three months to March 2020. In this time, China was in lockdown, the New Zealand border was closed, and our trade activity suffered from global reactions to the pandemic.

The full impact of the COVID-19 pandemic, including the Alert Level 4 lockdown in April/May 2020, will be captured in the March 2021 year. The March 2020 year provides a pre-pandemic baseline for regional economies.

New Zealand's economy was already maturing prior to the pandemic hitting, after having sustained 3%pa+ growth since 2015.

Professional, scientific and technical services was the largest contributor to growth in 2020, with activity in this industry rising 4.9%. Public administration and safety was the second largest contributor, with 5.8%pa growth over the year.

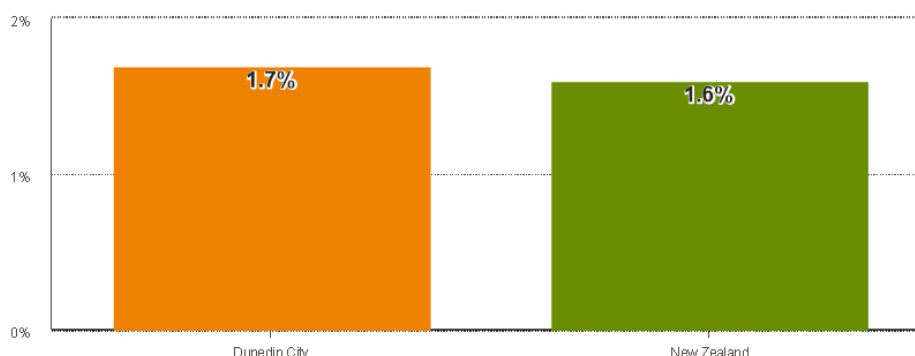
However, not all industries expanded. After being the top contributor to growth in 2019, the agriculture, forestry and fishing industry took a backwards step in 2020, with GDP falling 3.2%pa. Higher costs hit the primary sector in 2020, with drought conditions weighing on farm operators. Prices for livestock also fell as stock were sent to the works early. The early, but swift, impact of COVID-19 on international travel is hinted at in the March 2020 year figures, with the transport, postal and warehousing industry seeing a 1.1%pa fall as borders closed and airlines were squeezed hard.

### How fast has Dunedin City's economy grown?

This section measures economic performance in Dunedin City during the year to March 2020 and previous years. All GDP estimates are measured in constant 2020 prices.

- GDP in Dunedin City measured \$6,715m in the year to March 2020, up 1.7% from a year earlier. New Zealand's GDP increased by 1.6% over the same period.
- Economic growth in Dunedin City averaged 1.9%pa over the last 10 years compared with an average of 2.8%pa in the national economy.
- Growth in Dunedin City reached a high of 5.2% in 2003 and a low of -1.8% in 2010.
- Dunedin City accounted for 2.1% of national GDP in 2020.

Figure 1: GDP growth, year to Mar 2020



3 **Dunedin City Annual Economic Profile 2020**

Figure 2: Annual average GDP growth, 2001-2020

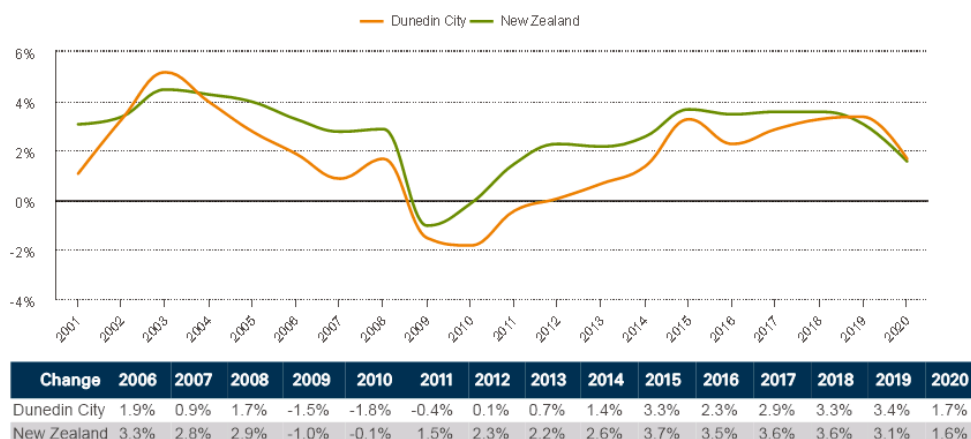
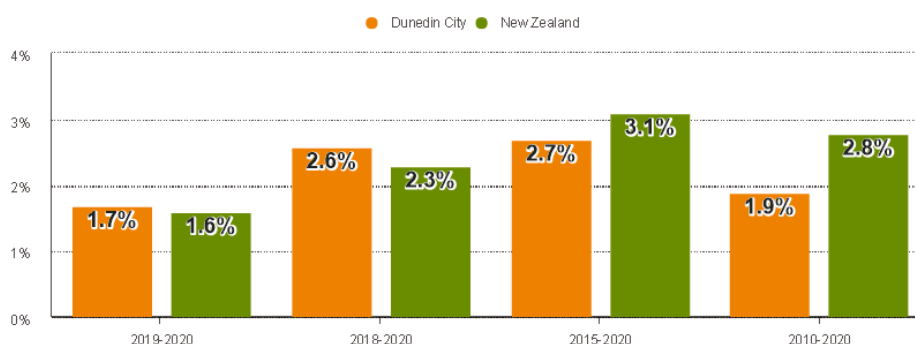


Figure 3: GDP growth over the last 1, 2, 5 & 10 years

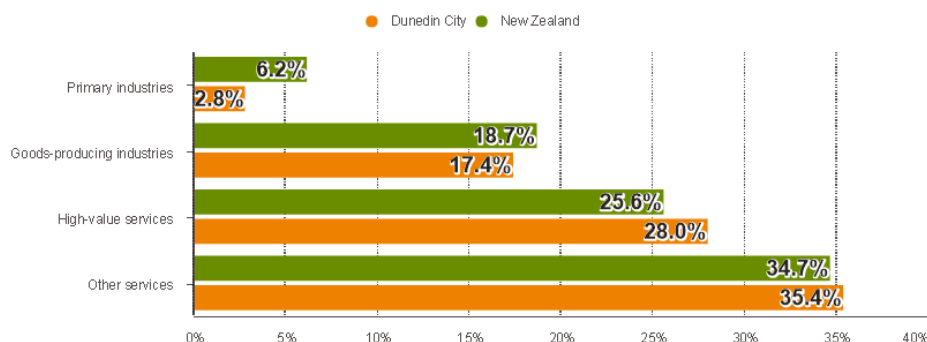


## What is the industrial structure of Dunedin City's economy?

This section describes the structure of the economy in terms of the broad sectors: primary, secondary, tertiary and quaternary. The primary sector makes direct use of natural resources. It extracts or harvests products from the earth. The secondary sector produces manufactured and other processed goods. The tertiary sector includes the lower value-adding service industries while the quaternary sector includes the higher value-adding, knowledge-based service industries. A full definition of the sectors is given in the technical appendix.

4 **Dunedin City Annual Economic Profile 2020**

Figure 4: Share of total GDP, 2020



- Primary industries industries accounted for the smallest proportion in Dunedin City: 2.8% compared with 6.2% in the national economy.
- Goods-producing industries industries accounted for 17.4% compared with 18.7% in the national economy.
- Other services industries accounted for the largest proportion of GDP (35.4%) in Dunedin City, which is higher than in the national economy (34.7%).
- High-value services industries accounted for 28.0% compared with 25.6% in the national economy.

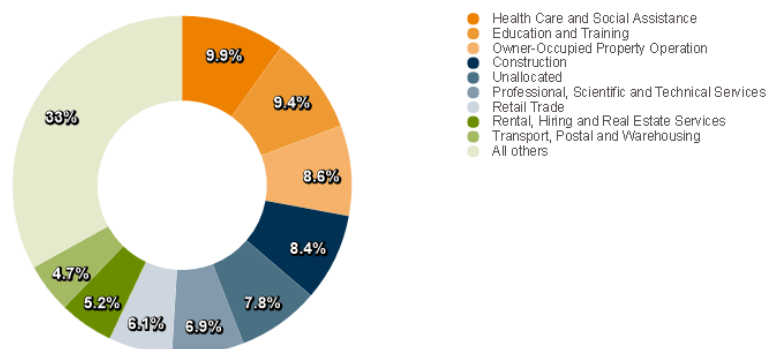
Table 1: GDP by ANZSIC 1-digit industry, 2020

| Industry  | Dunedin City    |                | New Zealand       |                |
|---|-----------------|----------------|-------------------|----------------|
|   | Level           | Share of total | Level             | Share of total |
| Health Care and Social Assistance               | \$666m          | 9.9%           | \$19,181m         | 5.9%           |
| Education and Training                          | \$629m          | 9.4%           | \$12,043m         | 3.7%           |
| Construction                                    | \$563m          | 8.4%           | \$21,066m         | 6.5%           |
| Professional, Scientific and Technical Services | \$461m          | 6.9%           | \$27,786m         | 8.6%           |
| Retail Trade                                    | \$407m          | 6.1%           | \$15,949m         | 4.9%           |
| Rental, Hiring and Real Estate Services         | \$348m          | 5.2%           | \$20,989m         | 6.5%           |
| Transport, Postal and Warehousing               | \$318m          | 4.7%           | \$13,751m         | 4.2%           |
| Manufacturing                                   | \$308m          | 4.6%           | \$30,681m         | 9.5%           |
| Public Administration and Safety                | \$300m          | 4.5%           | \$14,545m         | 4.5%           |
| Electricity, Gas, Water and Waste Services      | \$298m          | 4.4%           | \$8,797m          | 2.7%           |
| Accommodation and Food Services                 | \$225m          | 3.4%           | \$6,771m          | 2.1%           |
| Wholesale Trade                                 | \$209m          | 3.1%           | \$16,293m         | 5.0%           |
| Financial and Insurance Services                | \$206m          | 3.1%           | \$18,986m         | 5.9%           |
| Information Media and Telecommunications        | \$153m          | 2.3%           | \$12,165m         | 3.8%           |
| Agriculture, Forestry and Fishing               | \$152m          | 2.3%           | \$16,096m         | 5.0%           |
| Administrative and Support Services             | \$119m          | 1.8%           | \$6,846m          | 2.1%           |
| Other Services                                  | \$117m          | 1.7%           | \$5,586m          | 1.7%           |
| Arts and Recreation Services                    | \$100m          | 1.5%           | \$4,323m          | 1.3%           |
| Mining  | \$32.7m         | 0.5%           | \$3,876m          | 1.2%           |
| Owner-Occupied Property Operation               | \$579m          | 8.6%           | \$22,973m         | 7.1%           |
| Unallocated                                     | \$525m          | 7.8%           | \$25,318m         | 7.8%           |
| <b>Total</b>                                    | <b>\$6,715m</b> | <b>100%</b>    | <b>\$324,019m</b> | <b>100%</b>    |

5 **Dunedin City Annual Economic Profile 2020**

- Among broad industries Health Care and Social Assistance was the largest in Dunedin City in 2020 accounting for 9.9% of total.
- The second largest was Education and Training (9.4%) followed by Construction (8.4%)

Figure 5: Share of total GDP, 2020



The table on the following page shows 54 industries ranked according to their contribution to GDP. These industry categories are used by Statistics New Zealand in the national accounts. They are a mix of various levels of industries on the ANZSIC-06 classification. Further information about the industrial classification is given in the Technical Notes at the end of the document.

- Among detailed industries Health Care & Social Assistance was the largest in Dunedin City in 2020 accounting for 9.9% of total.
- The second largest was Education & Training (9.4%) followed by Professional, Scientific & Tech Services (6.9%)

Table 2: GDP by 54 industries, 2020

| Industry                                  | Dunedin City    |                | New Zealand       |                |
|---|-----------------|----------------|-------------------|----------------|
|   | Level           | Share of total | Level             | Share of total |
| Health Care & Social Assistance           | \$666m          | 9.9%           | \$19,181m         | 5.9%           |
| Education & Training                      | \$629m          | 9.4%           | \$12,043m         | 3.7%           |
| Professional, Scientific & Tech Services  | \$461m          | 6.9%           | \$27,786m         | 8.6%           |
| Property Operators & Real Estate Services | \$285m          | 4.3%           | \$17,392m         | 5.4%           |
| Central Gov Admin, Defence & Safety       | \$266m          | 4.0%           | \$12,795m         | 3.9%           |
| Construction Services                     | \$258m          | 3.8%           | \$10,751m         | 3.3%           |
| Electricity & Gas Supply                  | \$251m          | 3.7%           | \$7,224m          | 2.2%           |
| Accommodation & Food Services             | \$225m          | 3.4%           | \$6,771m          | 2.1%           |
| Other Store & Non Store Retailing         | \$216m          | 3.2%           | \$8,948m          | 2.8%           |
| Wholesale Trade                           | \$209m          | 3.1%           | \$16,293m         | 5.0%           |
| Heavy & Civil Engineering Construction    | \$202m          | 3.0%           | \$5,808m          | 1.8%           |
| Postal, Courier & Warehousing Services    | \$164m          | 2.4%           | \$6,076m          | 1.9%           |
| Finance                                   | \$141m          | 2.1%           | \$12,586m         | 3.9%           |
| Supermarket & Specialised Food Retailing  | \$133m          | 2.0%           | \$4,690m          | 1.4%           |
| Administrative & Support Services         | \$119m          | 1.8%           | \$6,846m          | 2.1%           |
| Road Transport                            | \$118m          | 1.8%           | \$4,719m          | 1.5%           |
| Other Services                            | \$117m          | 1.7%           | \$5,586m          | 1.7%           |
| Information Media Services                | \$107m          | 1.6%           | \$3,360m          | 1.0%           |
| Building Construction                     | \$102m          | 1.5%           | \$4,507m          | 1.4%           |
| Arts & Recreation Services                | \$100m          | 1.5%           | \$4,323m          | 1.3%           |
| Rental & Hiring Services                  | \$63.0m         | 0.9%           | \$3,596m          | 1.1%           |
| Motor Vehicle, Parts & Fuel Retailing     | \$58.7m         | 0.9%           | \$2,311m          | 0.7%           |
| Fabricated Metal Product Manufacturing    | \$54.4m         | 0.8%           | \$2,742m          | 0.8%           |
| Machinery & Other Equipment Manu          | \$53.8m         | 0.8%           | \$4,232m          | 1.3%           |
| Auxiliary Finance & Insurance Services    | \$51.4m         | 0.8%           | \$3,199m          | 1.0%           |
| Water, Sewerage & Waste Services          | \$46.5m         | 0.7%           | \$1,573m          | 0.5%           |
| Telecomms, Internet & Library Services    | \$45.6m         | 0.7%           | \$8,806m          | 2.7%           |
| Sheep, Beef Cattle & Grain Farming        | \$36.0m         | 0.5%           | \$3,147m          | 1.0%           |
| Rail, Water, Air & Other Transport        | \$36.0m         | 0.5%           | \$2,956m          | 0.9%           |
| Forestry & Logging                        | \$34.4m         | 0.5%           | \$2,016m          | 0.6%           |
| Dairy Cattle Farming                      | \$34.2m         | 0.5%           | \$6,202m          | 1.9%           |
| Local Government Administration           | \$33.9m         | 0.5%           | \$1,750m          | 0.5%           |
| Mining                                    | \$32.7m         | 0.5%           | \$3,876m          | 1.2%           |
| Printing                                  | \$30.0m         | 0.4%           | \$744m            | 0.2%           |
| Beverage & Tobacco Product Manu           | \$24.4m         | 0.4%           | \$2,633m          | 0.8%           |
| Transport Equipment Manufacturing         | \$24.2m         | 0.4%           | \$1,679m          | 0.5%           |
| Fruit, Cereal & Other Food Product Manu   | \$22.5m         | 0.3%           | \$2,498m          | 0.8%           |
| Agric Support Services & Hunting          | \$19.7m         | 0.3%           | \$2,302m          | 0.7%           |
| Wood Product Manufacturing                | \$16.6m         | 0.2%           | \$1,745m          | 0.5%           |
| Insurance & Superannuation Funds          | \$13.7m         | 0.2%           | \$3,202m          | 1.0%           |
| Furniture & Other Manufacturing           | \$13.0m         | 0.2%           | \$891m            | 0.3%           |
| Basic Chemical & Chemical Product Manu    | \$12.7m         | 0.2%           | \$1,924m          | 0.6%           |
| Fishing & Aquaculture                     | \$12.3m         | 0.2%           | \$483m            | 0.1%           |
| Primary Metal & Metal Product Manu        | \$10.3m         | 0.2%           | \$789m            | 0.2%           |
| Non-Metallic Mineral Product Manu         | \$10.2m         | 0.2%           | \$1,429m          | 0.4%           |
| Poultry, Deer & Other Livestock Farming   | \$10.2m         | 0.2%           | \$462m            | 0.1%           |
| Meat & Meat Product Manufacturing         | \$9.90m         | 0.1%           | \$2,169m          | 0.7%           |
| Textile, Leather, Clothing, Footwear Manu | \$9.68m         | 0.1%           | \$808m            | 0.2%           |
| Polymer Product & Rubber Product Manu     | \$6.52m         | 0.1%           | \$1,718m          | 0.5%           |
| Horticulture & Fruit Growing              | \$5.17m         | 0.1%           | \$1,485m          | 0.5%           |
| Pulp & Paper Product Manufacturing        | \$4.18m         | 0.1%           | \$965m            | 0.3%           |
| Seafood Processing                        | \$3.80m         | 0.1%           | \$497m            | 0.2%           |
| Petroleum & Coal Product Manufacturing    | \$0.75m         | 0.0%           | \$1,487m          | 0.5%           |
| Dairy Product Manufacturing               | \$0.61m         | 0.0%           | \$1,731m          | 0.5%           |
| Owner-Occupied Property Operation         | \$579m          | 8.6%           | \$22,973m         | 7.1%           |
| Unallocated                               | \$525m          | 7.8%           | \$25,318m         | 7.8%           |
| <b>Total</b>                              | <b>\$6,715m</b> | <b>100%</b>    | <b>\$324,019m</b> | <b>100%</b>    |

7 **Dunedin City Annual Economic Profile 2020**

## Which broad industries made the largest contribution to economic growth?

Although an industry may be growing rapidly, if it is small relative to a region's total economy its contribution to overall GDP growth may also be small. This section therefore investigates which broad industries made the largest contribution to the overall growth of Dunedin City's economy taking into account their relative sizes.

- Education and Training made the largest contribution to overall growth in Dunedin City between 2019 and 2020. The industry grew by 4.0% over the year and contributed 0.37 percentage points to the district's total growth of 1.7%.
- The next largest contributor was electricity, gas, water and waste services (0.36 percentage points) followed by health care and social assistance (0.31 percentage points).
- The largest detractor from growth over the year was Agriculture, Forestry and Fishing which declined by 8.2% and contributed -0.21 percentage points to the total growth of 1.7%. Manufacturing (-0.15 percentage points) was the next largest detractor.

**Table 3: ANZSIC 1-digit industries ranked by % point contribution to GDP growth, 2019-2020**

| Industry  | 2019         | 2020         | % point contribution to growth | Annual Growth |
|---|--------------|--------------|--------------------------------|---------------|
| Education and Training                          | 605          | 629          | 0.37%                          | 4.0%          |
| Electricity, Gas, Water and Waste Services      | 274          | 298          | 0.36%                          | 8.8%          |
| Health Care and Social Assistance               | 646          | 666          | 0.31%                          | 3.1%          |
| Retail Trade                                    | 389          | 407          | 0.28%                          | 4.7%          |
| Construction                                    | 546          | 563          | 0.24%                          | 2.9%          |
| Professional, Scientific and Technical Services | 445          | 461          | 0.24%                          | 3.6%          |
| Rental, Hiring and Real Estate Services         | 333          | 348          | 0.24%                          | 4.7%          |
| Public Administration and Safety                | 295          | 300          | 0.07%                          | 1.6%          |
| Information Media and Telecommunications        | 149          | 153          | 0.06%                          | 2.6%          |
| Other Services                                  | 115          | 117          | 0.02%                          | 1.4%          |
| Wholesale Trade                                 | 209          | 209          | 0.01%                          | 0.4%          |
| Administrative and Support Services             | 119          | 119          | 0.00%                          | -0.3%         |
| Arts and Recreation Services                    | 101          | 100          | -0.01%                         | -0.8%         |
| Financial and Insurance Services                | 208          | 206          | -0.03%                         | -0.8%         |
| Mining  | 39           | 33           | -0.09%                         | -15.8%        |
| Accommodation and Food Services                 | 233          | 225          | -0.12%                         | -3.3%         |
| Transport, Postal and Warehousing               | 326          | 318          | -0.12%                         | -2.5%         |
| Manufacturing                                   | 317          | 308          | -0.15%                         | -3.0%         |
| Agriculture, Forestry and Fishing               | 166          | 152          | -0.21%                         | -8.2%         |
| Owner-Occupied Property Operation               | 575.3        | 578.8        | 0.05%                          | 0.6%          |
| Unallocated                                     | 512.0        | 524.6        | 0.19%                          | 2.4%          |
| <b>Total</b>                                    | <b>6,601</b> | <b>6,715</b> | <b>1.7%</b>                    | <b>1.7%</b>   |

8 **Dunedin City Annual Economic Profile 2020**

## Which detailed industries made the largest contribution to economic growth?

The following table shows a ranking of the detailed industries by their contribution to economic growth over the past year.

- Electricity & Gas Supply made the largest contribution to overall growth in Dunedin City between 2019 and 2020. The industry grew by 11.1% over the year and contributed 0.38 percentage points to the district's total growth of 1.7%.
- The next largest contributor was education & training (0.37 percentage points) followed by health care & social assistance (0.31 percentage points).
- The largest detractor from growth over the year was Accommodation & Food Services which declined by 3.3% and contributed -0.12 percentage points to the total growth of 1.7%. Mining (-0.09 percentage points) was the next largest detractor.



**Table 4: 54 industries ranked by percentage point contribution to growth, 2019-2020**

| Industry                                  | 2019         | 2020         | % point contribution to growth | Annual Growth |
|---|--------------|--------------|--------------------------------|---------------|
| Electricity & Gas Supply                  | 226          | 251          | 0.38%                          | 11.1%         |
| Education & Training                      | 605          | 629          | 0.37%                          | 4.0%          |
| Health Care & Social Assistance           | 646          | 666          | 0.31%                          | 3.1%          |
| Heavy & Civil Engineering Construction    | 184          | 202          | 0.27%                          | 9.7%          |
| Professional, Scientific & Tech Services  | 445          | 461          | 0.24%                          | 3.6%          |
| Property Operators & Real Estate Services | 274          | 285          | 0.18%                          | 4.3%          |
| Other Store & Non Store Retailing         | 206          | 216          | 0.14%                          | 4.6%          |
| Supermarket & Specialised Food Retailing  | 126          | 133          | 0.10%                          | 5.2%          |
| Information Media Services                | 101          | 107          | 0.10%                          | 6.4%          |
| Printing                                  | 26           | 30           | 0.07%                          | 17.2%         |
| Rental & Hiring Services                  | 59           | 63           | 0.06%                          | 6.7%          |
| Local Government Administration           | 30           | 34           | 0.05%                          | 11.6%         |
| Construction Services                     | 256          | 258          | 0.04%                          | 1.0%          |
| Fabricated Metal Product Manufacturing    | 52           | 54           | 0.03%                          | 4.4%          |
| Motor Vehicle, Parts & Fuel Retailing     | 57           | 59           | 0.03%                          | 3.9%          |
| Other Services                            | 115          | 117          | 0.02%                          | 1.4%          |
| Central Gov Admin, Defence & Safety       | 264          | 266          | 0.02%                          | 0.5%          |
| Rail, Water, Air & Other Transport        | 35           | 36           | 0.02%                          | 3.4%          |
| Wholesale Trade                           | 209          | 209          | 0.01%                          | 0.4%          |
| Meat & Meat Product Manufacturing         | 9            | 10           | 0.01%                          | 6.4%          |
| Primary Metal & Metal Product Manu        | 10           | 10           | 0.01%                          | 4.0%          |
| Dairy Cattle Farming                      | 34           | 34           | 0.01%                          | 1.0%          |
| Petroleum & Coal Product Manufacturing    | 0            | 1            | 0.00%                          | 61.2%         |
| Wood Product Manufacturing                | 16           | 17           | 0.00%                          | 0.8%          |
| Insurance & Superannuation Funds          | 14           | 14           | 0.00%                          | 0.9%          |
| Seafood Processing                        | 4            | 4            | 0.00%                          | -0.4%         |
| Dairy Product Manufacturing               | 1            | 1            | 0.00%                          | -20.0%        |
| Pulp & Paper Product Manufacturing        | 4            | 4            | 0.00%                          | -3.5%         |
| Administrative & Support Services         | 119          | 119          | 0.00%                          | -0.3%         |
| Basic Chemical & Chemical Product Manu    | 13           | 13           | -0.01%                         | -2.9%         |
| Horticulture & Fruit Growing              | 6            | 5            | -0.01%                         | -7.1%         |
| Furniture & Other Manufacturing           | 14           | 13           | -0.01%                         | -3.7%         |
| Finance                                   | 141          | 141          | -0.01%                         | -0.5%         |
| Polymer Product & Rubber Product Manu     | 7            | 7            | -0.01%                         | -11.2%        |
| Arts & Recreation Services                | 101          | 100          | -0.01%                         | -0.8%         |
| Water, Sewerage & Waste Services          | 47           | 46           | -0.02%                         | -2.1%         |
| Auxiliary Finance & Insurance Services    | 53           | 51           | -0.02%                         | -2.3%         |
| Poultry, Deer & Other Livestock Farming   | 11           | 10           | -0.02%                         | -10.9%        |
| Agric Support Services & Hunting          | 21           | 20           | -0.02%                         | -6.7%         |
| Transport Equipment Manufacturing         | 26           | 24           | -0.02%                         | -5.6%         |
| Non-Metallic Mineral Product Manu         | 12           | 10           | -0.02%                         | -12.7%        |
| Fishing & Aquaculture                     | 14           | 12           | -0.02%                         | -11.4%        |
| Beverage & Tobacco Product Manu           | 26           | 24           | -0.03%                         | -7.5%         |
| Textile, Leather, Clothing, Footwear Manu | 12           | 10           | -0.03%                         | -17.4%        |
| Telecomms, Internet & Library Services    | 48           | 46           | -0.04%                         | -5.3%         |
| Fruit, Cereal & Other Food Product Manu   | 26           | 23           | -0.05%                         | -13.3%        |
| Sheep, Beef Cattle & Grain Farming        | 40           | 36           | -0.06%                         | -10.2%        |
| Building Construction                     | 107          | 102          | -0.07%                         | -4.1%         |
| Postal, Courier & Warehousing Services    | 169          | 164          | -0.07%                         | -2.6%         |
| Road Transport                            | 123          | 118          | -0.07%                         | -3.9%         |
| Forestry & Logging                        | 40           | 34           | -0.08%                         | -13.1%        |
| Machinery & Other Equipment Manu          | 59           | 54           | -0.08%                         | -9.0%         |
| Mining                                    | 39           | 33           | -0.09%                         | -15.8%        |
| Accommodation & Food Services             | 233          | 225          | -0.12%                         | -3.3%         |
| Owner-Occupied Property Operation         | 575.3        | 578.8        | 0.05%                          | 0.6%          |
| Unallocated                               | 512.0        | 524.6        | 0.19%                          | 2.4%          |
| <b>Total</b>                              | <b>6,601</b> | <b>6,715</b> | <b>1.7%</b>                    | <b>1.7%</b>   |

## In which industries does Dunedin City have a comparative advantage?

A high concentration of certain industries in a region may be indicative of that region having a comparative advantage in those industries. This may be due to its natural endowments, location, skills of its labour force or other reasons. The location quotient indicates in which industries a region has comparative advantage. A region has a location quotient larger (smaller) than one when the share of that industry in the regional economy is greater (less) than the share of the same industry in the national economy.

The following table shows a ranking of 54 industries by their location quotients.

- The industries in which Dunedin City has the largest comparative advantages are Education & Training (location quotient = 2.5), Printing (1.9), and Heavy & Civil Engineering Construction (1.7).

Table 5: Location Quotient, 2020

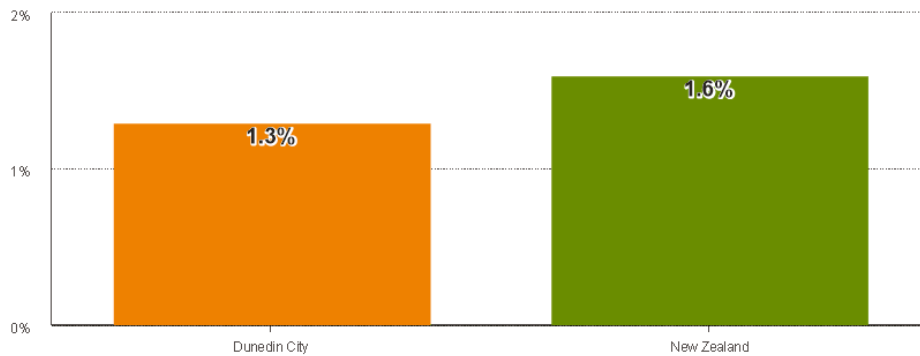
| Industry                                  | Dunedin City      |                    | New Zealand        |
|---|-------------------|--------------------|--------------------|
|   | Location Quotient | Share of total GDP | Share of total GDP |
| Education & Training                      | 2.5               | 9.4%               | 3.7%               |
| Printing                                  | 1.9               | 0.4%               | 0.2%               |
| Heavy & Civil Engineering Construction    | 1.7               | 3.0%               | 1.8%               |
| Electricity & Gas Supply                  | 1.7               | 3.7%               | 2.2%               |
| Health Care & Social Assistance           | 1.7               | 9.9%               | 5.9%               |
| Accommodation & Food Services             | 1.6               | 3.4%               | 2.1%               |
| Information Media Services                | 1.5               | 1.6%               | 1.0%               |
| Water, Sewerage & Waste Services          | 1.4               | 0.7%               | 0.5%               |
| Supermarket & Specialised Food Retailing  | 1.4               | 2.0%               | 1.4%               |
| Postal, Courier & Warehousing Services    | 1.3               | 2.4%               | 1.9%               |
| Motor Vehicle, Parts & Fuel Retailing     | 1.2               | 0.9%               | 0.7%               |
| Fishing & Aquaculture                     | 1.2               | 0.2%               | 0.1%               |
| Road Transport                            | 1.2               | 1.8%               | 1.5%               |
| Other Store & Non Store Retailing         | 1.2               | 3.2%               | 2.8%               |
| Construction Services                     | 1.2               | 3.8%               | 3.3%               |
| Arts & Recreation Services                | 1.1               | 1.5%               | 1.3%               |
| Building Construction                     | 1.1               | 1.5%               | 1.4%               |
| Poultry, Deer & Other Livestock Farming   | 1.1               | 0.2%               | 0.1%               |
| Other Services                            | 1.0               | 1.7%               | 1.7%               |
| Central Gov Admin, Defence & Safety       | 1.0               | 4.0%               | 3.9%               |
| Fabricated Metal Product Manufacturing    | 1.0               | 0.8%               | 0.8%               |
| Local Government Administration           | 0.9               | 0.5%               | 0.5%               |
| Rental & Hiring Services                  | 0.8               | 0.9%               | 1.1%               |
| Administrative & Support Services         | 0.8               | 1.8%               | 2.1%               |
| Forestry & Logging                        | 0.8               | 0.5%               | 0.6%               |
| Professional, Scientific & Tech Services  | 0.8               | 6.9%               | 8.6%               |
| Property Operators & Real Estate Services | 0.8               | 4.3%               | 5.4%               |
| Auxiliary Finance & Insurance Services    | 0.8               | 0.8%               | 1.0%               |
| Furniture & Other Manufacturing           | 0.7               | 0.2%               | 0.3%               |
| Transport Equipment Manufacturing         | 0.7               | 0.4%               | 0.5%               |
| Primary Metal & Metal Product Manu        | 0.6               | 0.2%               | 0.2%               |
| Wholesale Trade                           | 0.6               | 3.1%               | 5.0%               |
| Machinery & Other Equipment Manu          | 0.6               | 0.8%               | 1.3%               |
| Rail, Water, Air & Other Transport        | 0.6               | 0.5%               | 0.9%               |
| Textile, Leather, Clothing, Footwear Manu | 0.6               | 0.1%               | 0.2%               |
| Sheep, Beef Cattle & Grain Farming        | 0.6               | 0.5%               | 1.0%               |
| Finance                                   | 0.5               | 2.1%               | 3.9%               |
| Wood Product Manufacturing                | 0.5               | 0.2%               | 0.5%               |
| Beverage & Tobacco Product Manu           | 0.4               | 0.4%               | 0.8%               |
| Fruit, Cereal & Other Food Product Manu   | 0.4               | 0.3%               | 0.8%               |
| Agric Support Services & Hunting          | 0.4               | 0.3%               | 0.7%               |
| Mining                                    | 0.4               | 0.5%               | 1.2%               |
| Seafood Processing                        | 0.4               | 0.1%               | 0.2%               |
| Non-Metallic Mineral Product Manu         | 0.3               | 0.2%               | 0.4%               |
| Basic Chemical & Chemical Product Manu    | 0.3               | 0.2%               | 0.6%               |
| Dairy Cattle Farming                      | 0.3               | 0.5%               | 1.9%               |
| Telecomms, Internet & Library Services    | 0.3               | 0.7%               | 2.7%               |
| Meat & Meat Product Manufacturing         | 0.2               | 0.1%               | 0.7%               |
| Pulp & Paper Product Manufacturing        | 0.2               | 0.1%               | 0.3%               |
| Insurance & Superannuation Funds          | 0.2               | 0.2%               | 1.0%               |
| Polymer Product & Rubber Product Manu     | 0.2               | 0.1%               | 0.5%               |
| Horticulture & Fruit Growing              | 0.2               | 0.1%               | 0.5%               |
| Petroleum & Coal Product Manufacturing    | 0.0               | 0.0%               | 0.5%               |
| Dairy Product Manufacturing               | 0.0               | 0.0%               | 0.5%               |

## EMPLOYMENT

### How fast has employment grown in Dunedin City?

Employment growth provides new opportunities for the region's population to earn income and contribute to the region's economy. This section contrasts Dunedin City's recent performance in creating jobs with other regions in the country.

Figure 6: Employment growth, year to Mar 2020



- Total employment in Dunedin City averaged 66,107 in the year to March 2020, up 1.3% from a year earlier. Employment in New Zealand increased by 1.6% over the same period.
- Employment growth in Dunedin City averaged 0.9%pa over the last 10 years compared with 1.9%pa in the national economy.
- Employment growth in Dunedin City reached a high of 3.8% in 2002 and a low of -2.6% in 2010.

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Figure 7: Annual average employment growth, 2001-2020

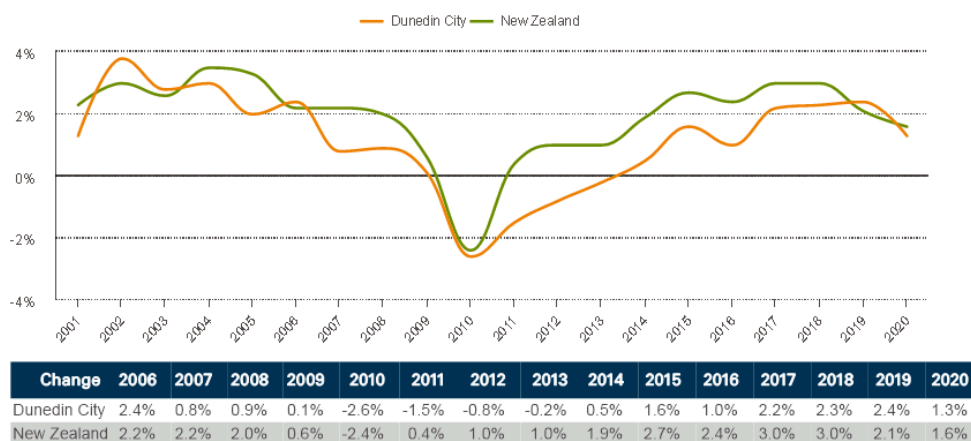
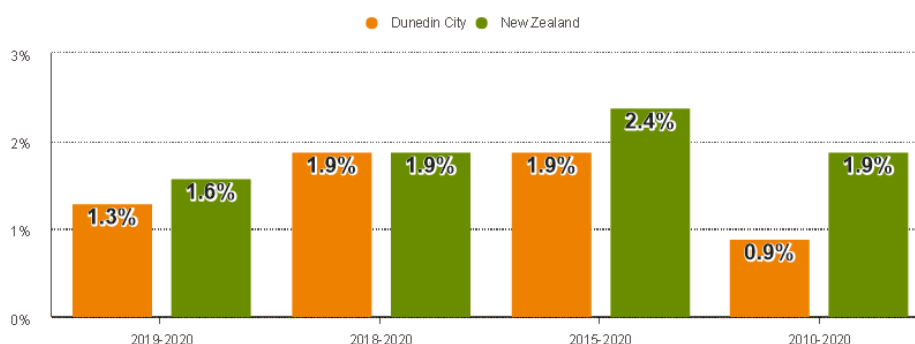


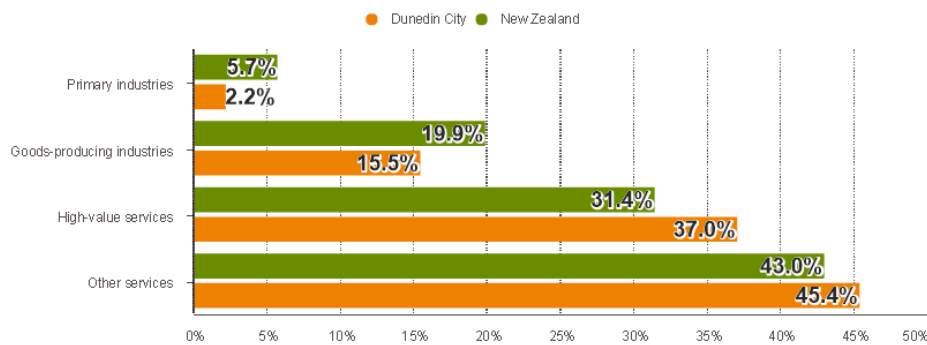
Figure 8: Employment growth over the last 1, 2, 5 & 10 years



## What is the industrial structure of employment in Dunedin City?

This section describes the structure of the labour market in terms of the primary, secondary, tertiary and quaternary categories and the industries that fall within these categories. The primary sector makes direct use of natural resources. It extracts or harvests products from the earth. The secondary sector produces manufactured and other processed goods. The tertiary sector produces manufactured and other processed goods. The tertiary sector includes the lower value-adding service industries while the quaternary sector includes the higher value-adding, knowledge-based service industries. A list of industries making up the quaternary sector is given in the technical appendix.

Figure 9: Employment by broad sector, 2020



- Primary industries accounted for 2.2% in Dunedin City compared with 5.7% in New Zealand.
- Goods-producing industries accounted for 15.5% in Dunedin City compared with 19.9% in New Zealand.
- Other services industries accounted for the largest proportion of employment (45.4%) in Dunedin City, which is higher than in New Zealand (43.0%).
- High-value services accounted for 37.0% in Dunedin City compared with 31.4% in New Zealand.

## Which are the largest employing industries in Dunedin City?

This section identifies the broad industries that make the largest contribution to employment in Dunedin City.

**Table 6: ANZSIC 1-digit industries ranked by size of employment, 2020**

| Industry  | Dunedin City  |                | New Zealand      |                |
|---|---------------|----------------|------------------|----------------|
|   | Level         | Share of total | Level            | Share of total |
| Health Care and Social Assistance               | 10,025        | 15.2%          | 255,006          | 9.8%           |
| Education and Training                          | 9,233         | 14.0%          | 199,529          | 7.7%           |
| Retail Trade                                    | 6,651         | 10.1%          | 230,026          | 8.9%           |
| Construction                                    | 5,949         | 9.0%           | 253,915          | 9.8%           |
| Accommodation and Food Services                 | 5,310         | 8.0%           | 172,458          | 6.7%           |
| Professional, Scientific and Technical Services | 4,484         | 6.8%           | 249,058          | 9.6%           |
| Manufacturing                                   | 3,854         | 5.8%           | 244,404          | 9.4%           |
| Public Administration and Safety                | 3,270         | 4.9%           | 132,612          | 5.1%           |
| Other Services                                  | 2,810         | 4.2%           | 99,213           | 3.8%           |
| Transport, Postal and Warehousing               | 2,666         | 4.0%           | 109,456          | 4.2%           |
| Administrative and Support Services             | 2,379         | 3.6%           | 134,338          | 5.2%           |
| Wholesale Trade                                 | 2,341         | 3.5%           | 125,648          | 4.8%           |
| Arts and Recreation Services                    | 1,625         | 2.5%           | 49,299           | 1.9%           |
| Agriculture, Forestry and Fishing               | 1,392         | 2.1%           | 140,565          | 5.4%           |
| Rental, Hiring and Real Estate Services         | 1,327         | 2.0%           | 61,836           | 2.4%           |
| Information Media and Telecommunications        | 1,241         | 1.9%           | 41,509           | 1.6%           |
| Financial and Insurance Services                | 1,061         | 1.6%           | 69,281           | 2.7%           |
| Electricity, Gas, Water and Waste Services      | 423           | 0.6%           | 18,199           | 0.7%           |
| Mining  | 68            | 0.1%           | 6,035            | 0.2%           |
| <b>Total</b>                                    | <b>66,107</b> | <b>100%</b>    | <b>2,592,389</b> | <b>100%</b>    |

- Among broad industries Health Care and Social Assistance was the largest in Dunedin City in 2020 accounting for 15.2% of total.
- The second largest was Education and Training (14.0%) followed by Retail Trade (10.1%)

The table on the following page shows the 50 detailed industries among the approximately 500 7-digit ANZSIC industry categories which employ the highest number of people in Dunedin City.

- Higher Education was the largest 7-digit industry in Dunedin City in 2020 employing 4,665 persons and accounting for 7.1% of total employment in the district. By contrast this industry accounted for 1.4% of total employment in New Zealand.
- The second largest employing industries were hospitals (except psychiatric hospitals) (3,744) followed by cafes and restaurants (2,226).

**Table 7: 50 largest employing ANZSIC 7-digit industries, 2020**

| Rank                              | Industry   | Dunedin City  |              | New Zealand  |
|-----------------------------------|--|---------------|--------------|--------------|
|                                   |  | Jobs          | % of total   | % of total   |
| 1                                 | Higher Education                                       | 4,665         | 7.1%         | 1.4%         |
| 2                                 | Hospitals (except Psychiatric Hospitals)               | 3,744         | 5.7%         | 2.9%         |
| 3                                 | Cafes and Restaurants                                  | 2,226         | 3.4%         | 2.9%         |
| 4                                 | Supermarket and Grocery Stores                         | 2,096         | 3.2%         | 2.4%         |
| 5                                 | Accommodation  | 1,547         | 2.3%         | 1.4%         |
| 6                                 | Aged Care Residential Services                         | 1,340         | 2.0%         | 1.4%         |
| 7                                 | Other Social Assistance Services                       | 1,305         | 2.0%         | 0.8%         |
| 8                                 | Primary Education                                      | 1,279         | 1.9%         | 2.1%         |
| 9                                 | Central Government Administration                      | 1,140         | 1.7%         | 1.6%         |
| 10                                | House Construction                                     | 1,070         | 1.6%         | 2.0%         |
| 11                                | Technical and Vocational Education and Training        | 924           | 1.4%         | 0.4%         |
| 12                                | Secondary Education                                    | 882           | 1.3%         | 1.4%         |
| 13                                | Road Freight Transport                                 | 804           | 1.2%         | 1.3%         |
| 14                                | Buildings Cleaning Services                            | 801           | 1.2%         | 1.1%         |
| 15                                | Preschool Education                                    | 751           | 1.1%         | 1.1%         |
| 16                                | Road and Bridge Construction                           | 736           | 1.1%         | 0.7%         |
| 17                                | Computer Systems Design and Related Services           | 719           | 1.1%         | 1.8%         |
| 18                                | Takeaway Food Services                                 | 718           | 1.1%         | 1.2%         |
| 19                                | Other Allied Health Services                           | 692           | 1.0%         | 1.3%         |
| 20                                | Newspaper Publishing                                   | 687           | 1.0%         | 0.1%         |
| 21                                | Management Advice and Other Consulting Services        | 628           | 0.9%         | 1.7%         |
| 22                                | Investigation and Security Services                    | 612           | 0.9%         | 0.5%         |
| 23                                | Electrical Services                                    | 606           | 0.9%         | 0.9%         |
| 24                                | Other Residential Care Services                        | 596           | 0.9%         | 0.6%         |
| 25                                | Accounting Services                                    | 592           | 0.9%         | 1.0%         |
| 26                                | Pubs, Taverns and Bars                                 | 587           | 0.9%         | 0.6%         |
| 27                                | Engineering Design and Engineering Consulting Services | 582           | 0.9%         | 1.2%         |
| 28                                | Local Government Administration                        | 544           | 0.8%         | 1.0%         |
| 29                                | Department Stores                                      | 543           | 0.8%         | 0.7%         |
| 30                                | Hardware and Building Supplies Retailing               | 525           | 0.8%         | 0.8%         |
| 31                                | Real Estate Services                                   | 521           | 0.8%         | 0.9%         |
| 32                                | Other Heavy and Civil Engineering Construction         | 516           | 0.8%         | 0.8%         |
| 33                                | Legal Services   | 513           | 0.8%         | 0.8%         |
| 34                                | Other Automotive Repair and Maintenance                | 478           | 0.7%         | 0.7%         |
| 35                                | Police Services  | 472           | 0.7%         | 0.6%         |
| 36                                | Hairdressing and Beauty Services                       | 468           | 0.7%         | 0.7%         |
| 37                                | Car Retailing  | 449           | 0.7%         | 0.5%         |
| 38                                | Printing   | 439           | 0.7%         | 0.3%         |
| 39                                | Other Interest Group Services n.e.c.                   | 429           | 0.6%         | 0.5%         |
| 40                                | Plumbing Services                                      | 419           | 0.6%         | 0.6%         |
| 41                                | Painting and Decorating Services                       | 419           | 0.6%         | 0.6%         |
| 42                                | General Practice Medical Services                      | 403           | 0.6%         | 0.6%         |
| 43                                | Clothing Retailing                                     | 399           | 0.6%         | 0.6%         |
| 44                                | Employment Placement and Recruitment Services          | 378           | 0.6%         | 0.7%         |
| 45                                | Labour Supply Services                                 | 378           | 0.6%         | 1.3%         |
| 46                                | Port and Water Transport Terminal Operations           | 351           | 0.5%         | 0.1%         |
| 47                                | Child Care Services                                    | 349           | 0.5%         | 0.6%         |
| 48                                | Pathology and Diagnostic Imaging Services              | 344           | 0.5%         | 0.2%         |
| 49                                | Other Health Care Services n.e.c.                      | 342           | 0.5%         | 0.3%         |
| 50                                | Pharmaceutical, Cosmetic and Toiletry Goods Retailing  | 337           | 0.5%         | 0.4%         |
| <b>All other industries total</b> |  | <b>23,764</b> | <b>35.9%</b> | <b>49.9%</b> |
| <b>Total</b>                      |  | <b>66,107</b> | <b>100%</b>  | <b>100%</b>  |



## Which industries have created the most jobs?

The section investigates which industries have created and lost the most number of jobs in Dunedin City. The employment numbers differ from those published in Business Demography by Statistics New Zealand. The reasons for these differences are explained in the technical appendix.

**Table 8: ANZSIC 1-digit industries ranked by number of jobs created, 2019-2020**

| Industry  | 2019          | 2020          | Change     | Annual Growth |
|---|---------------|---------------|------------|---------------|
| Education and Training                          | 8,770         | 9,233         | 463        | 5.3%          |
| Health Care and Social Assistance               | 9,757         | 10,025        | 268        | 2.7%          |
| Construction                                    | 5,824         | 5,949         | 124        | 2.1%          |
| Public Administration and Safety                | 3,156         | 3,270         | 115        | 3.6%          |
| Retail Trade                                    | 6,558         | 6,651         | 93         | 1.4%          |
| Administrative and Support Services             | 2,326         | 2,379         | 53         | 2.3%          |
| Rental, Hiring and Real Estate Services         | 1,276         | 1,327         | 51         | 4.0%          |
| Other Services                                  | 2,761         | 2,810         | 49         | 1.8%          |
| Electricity, Gas, Water and Waste Services      | 402           | 423           | 21         | 5.3%          |
| Arts and Recreation Services                    | 1,609         | 1,625         | 15         | 0.9%          |
| Transport, Postal and Warehousing               | 2,653         | 2,666         | 13         | 0.5%          |
| Professional, Scientific and Technical Services | 4,471         | 4,484         | 12         | 0.3%          |
| Wholesale Trade                                 | 2,351         | 2,341         | -10        | -0.4%         |
| Mining  | 84            | 68            | -15        | -18.3%        |
| Financial and Insurance Services                | 1,083         | 1,061         | -22        | -2.0%         |
| Information Media and Telecommunications        | 1,299         | 1,241         | -58        | -4.5%         |
| Manufacturing                                   | 3,939         | 3,854         | -85        | -2.2%         |
| Agriculture, Forestry and Fishing               | 1,490         | 1,392         | -97        | -6.5%         |
| Accommodation and Food Services                 | 5,421         | 5,310         | -111       | -2.1%         |
| <b>Total</b>                                    | <b>65,227</b> | <b>66,107</b> | <b>879</b> | <b>1.3%</b>   |

- Education and Training made the largest contribution to employment growth in Dunedin City between 2019 and 2020 with the industry adding 463 jobs.
- The next largest contributor was Health Care and Social Assistance (268 jobs) followed by Construction (124 jobs).
- The largest detractor from growth over the year was Accommodation and Food Services in which employment declined by 111.

The table on the next page shows the 20 industries (out of a total of approximately 500 industries of the ANZSIC 2006 industry classification<sup>1</sup>) that created the most number of jobs over the past year. Table 15 shows the 20 detailed industries that made the lowest contribution to job creation over the same period.

- Tertiary Education was the largest creator of jobs in Dunedin City between 2019 and 2020, generating an additional 318 positions.
- This was followed by Hospitals, which added 237 jobs over the same period.
- Accommodation was the largest detractor of jobs in Dunedin City between 2019 and 2020, losing 137 positions.
- This was followed by Non-Residential Building Construction, which lost 117 jobs over the same period.

**Table 9: The 20 ANZSIC 4-digit industries that created the most jobs, 2019-2020**

| Rank                        | Industry   | Jobs          |               | Change<br>2019 - 2020 | % of total 2020 |
|-----------------------------|--|---------------|---------------|-----------------------|-----------------|
|                             |  | 2019          | 2020          |                       |                 |
| 1                           | Tertiary Education                                     | 5,271         | 5,589         | 318                   | 8.5%            |
| 2                           | Hospitals  | 3,587         | 3,824         | 237                   | 5.8%            |
| 3                           | Heavy and Civil Engineering Construction               | 1,131         | 1,252         | 121                   | 1.9%            |
| 4                           | Central Government Administration                      | 1,035         | 1,140         | 104                   | 1.7%            |
| 5                           | Cafes, Restaurants and Takeaway Food Services          | 3,035         | 3,132         | 97                    | 4.7%            |
| 6                           | Preschool Education                                    | 655           | 751           | 97                    | 1.1%            |
| 7                           | Residential Care Services                              | 1,849         | 1,936         | 87                    | 2.9%            |
| 8                           | Building Cleaning, Pest Control and Gardening Services | 947           | 1,025         | 78                    | 1.6%            |
| 9                           | Civic, Professional and Other Interest Group Services  | 446           | 512           | 66                    | 0.8%            |
| 10                          | Residential Building Construction                      | 1,100         | 1,164         | 64                    | 1.8%            |
| 11                          | Printing   | 383           | 441           | 58                    | 0.7%            |
| 12                          | Other Social Assistance Services                       | 1,252         | 1,305         | 53                    | 2.0%            |
| 13                          | Local Government Administration                        | 497           | 544           | 47                    | 0.8%            |
| 14                          | Supermarket and Grocery Stores                         | 2,052         | 2,096         | 44                    | 3.2%            |
| 15                          | Architectural, Engineering and Technical Services      | 1,215         | 1,251         | 36                    | 1.9%            |
| 16                          | Electricity Distribution                               | 31            | 64            | 33                    | 0.1%            |
| 17                          | School Education                                       | 2,390         | 2,421         | 31                    | 3.7%            |
| 18                          | Other Goods and Equipment Rental and Hiring            | 152           | 183           | 30                    | 0.3%            |
| 19                          | Recreational Goods Retailing                           | 294           | 320           | 25                    | 0.5%            |
| 20                          | Electrical and Electronic Goods Retailing              | 240           | 263           | 24                    | 0.4%            |
| <b>All other industries</b> |  | <b>37,666</b> | <b>38,895</b> | <b>-771</b>           | <b>55.8%</b>    |
| <b>Total</b>                |  | <b>65,227</b> | <b>66,107</b> | <b>879</b>            | <b>100%</b>     |

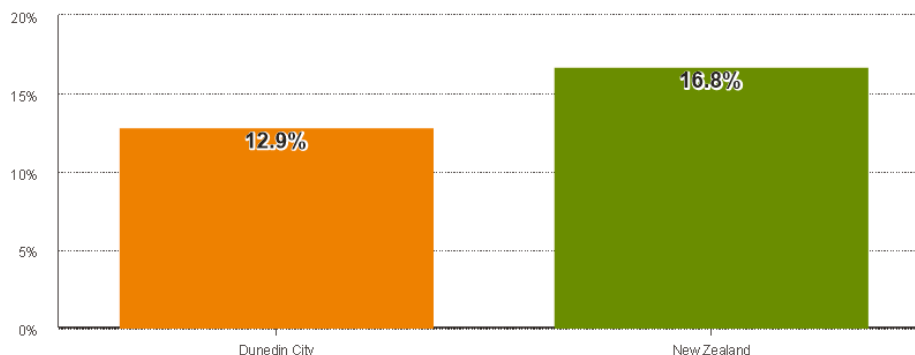
**Table 10: The 20 ANZSIC 4-digit industries that lost the most jobs, 2019-2020**

| Rank                        | Industry   | Jobs          |               | Change<br>2019 - 2020 | % of total 2020 |
|-----------------------------|--|---------------|---------------|-----------------------|-----------------|
|                             |  | 2019          | 2020          |                       |                 |
| 1                           | Accommodation  | 1,683         | 1,547         | -137                  | 2.3%            |
| 2                           | Non-Residential Building Construction                                    | 447           | 330           | -117                  | 0.5%            |
| 3                           | Allied Health Services   | 1,336         | 1,268         | -68                   | 1.9%            |
| 4                           | Pubs, Taverns and Bars   | 644           | 587           | -57                   | 0.9%            |
| 5                           | Medical Services   | 663           | 616           | -47                   | 0.9%            |
| 6                           | Defence  | 51            | 9             | -42                   | 0.0%            |
| 7                           | Other Food Product Manufacturing   | 183           | 142           | -41                   | 0.2%            |
| 8                           | Textile Product Manufacturing  | 117           | 79            | -38                   | 0.1%            |
| 9                           | Agriculture and Fishing Support Services                                 | 195           | 158           | -37                   | 0.2%            |
| 10                          | Depository Financial Intermediation                                      | 394           | 360           | -34                   | 0.5%            |
| 11                          | Grain, Sheep and Beef Cattle Farming                                     | 405           | 372           | -33                   | 0.6%            |
| 12                          | Postal and Courier Pick-up and Delivery Services                         | 324           | 295           | -28                   | 0.4%            |
| 13                          | Other Administrative Services  | 456           | 432           | -24                   | 0.7%            |
| 14                          | Building Installation Services   | 1,364         | 1,342         | -22                   | 2.0%            |
| 15                          | Management and Other Consulting Services                                 | 911           | 891           | -20                   | 1.3%            |
| 16                          | Data Processing, Web Hosting and Electronic Information Storage Services | 49            | 29            | -20                   | 0.0%            |
| 17                          | Fishing  | 86            | 68            | -18                   | 0.1%            |
| 18                          | Agricultural Product Wholesaling   | 177           | 159           | -18                   | 0.2%            |
| 19                          | Newspaper, Periodical, Book and Directory Publishing                     | 727           | 710           | -17                   | 1.1%            |
| 20                          | Poultry Farming  | 149           | 133           | -16                   | 0.2%            |
| <b>All other industries</b> |  | <b>54,869</b> | <b>56,583</b> | <b>1,714</b>          | <b>85.6%</b>    |
| <b>Total</b>                |  | <b>65,227</b> | <b>66,107</b> | <b>879</b>            | <b>100%</b>     |

## What proportion of the workforce is self-employed in Dunedin City?

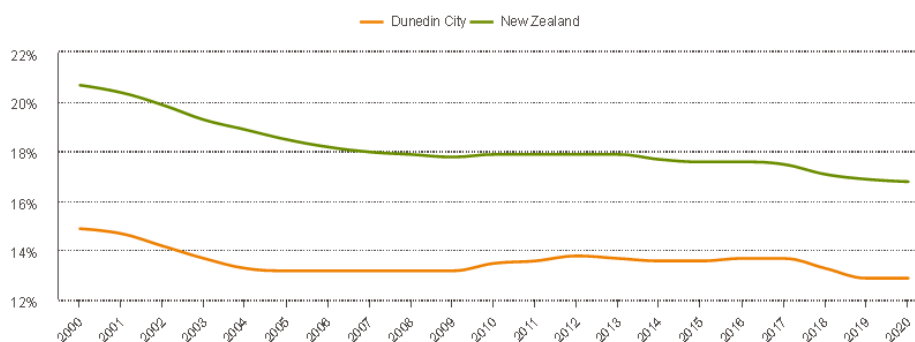
Self-employment makes up a sizeable proportion of total employment in New Zealand although it declined through the economic boom years and stabilised since the recession. This section contrasts self-employment in Dunedin City with the national economy.

Figure 10: Self employment rate, 2020



- Self-employed workers accounted for 12.9% of the workforce in Dunedin City in 2020, which was a lower rate than in the national economy (16.8%)
- A total of 8,521 workers were self-employed in Dunedin City in 2020.

Figure 11: Self employment rate, 2000-2020



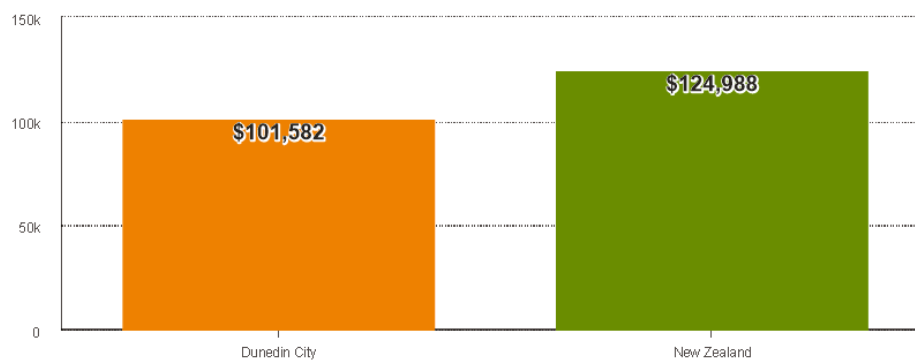
| Level        | 2006  | 2007  | 2008  | 2009  | 2010  | 2011  | 2012  | 2013  | 2014  | 2015  | 2016  | 2017  | 2018  | 2019  | 2020  |
|--------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| Dunedin City | 13.2% | 13.2% | 13.2% | 13.2% | 13.5% | 13.6% | 13.8% | 13.7% | 13.6% | 13.6% | 13.7% | 13.7% | 13.3% | 12.9% | 12.9% |
| New Zealand  | 18.2% | 18.0% | 17.9% | 17.8% | 17.9% | 17.9% | 17.9% | 17.9% | 17.7% | 17.6% | 17.6% | 17.5% | 17.1% | 16.9% | 16.8% |

## PRODUCTIVITY

Productivity is a way of describing the efficiency of production. In this section, we investigate GDP per employee to determine how much economic activity is generated on average by each employee. When looking at this indicator, one needs to consider that labour is only one input into production. As a result, a comparison of a region's labour productivity growth to its own history or to other districts, implicitly assumes that each worker has the same access to machinery, technology, and land.

This section describes Dunedin City's productivity level during the year to March 2020 and previous years. Productivity is measured by GDP per employee (in constant 2020 prices).

Figure 12: Productivity, 2020

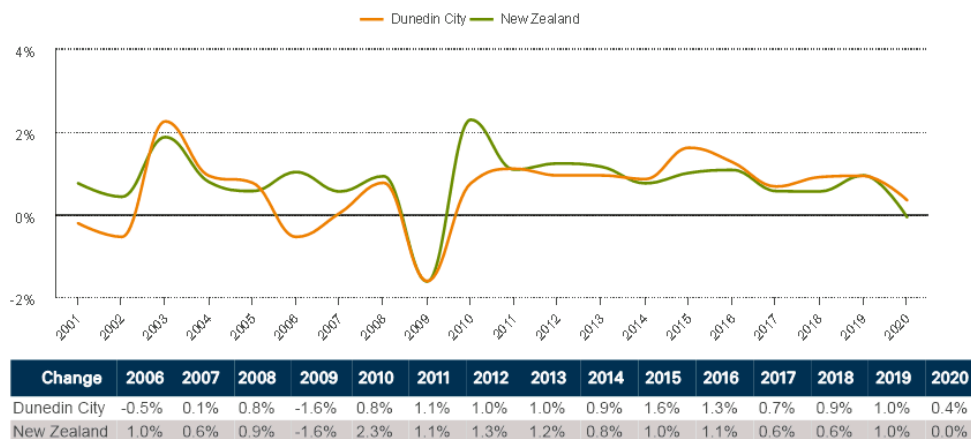


- GDP per employee in Dunedin City measured \$101,582 in the year to March 2020, which was 18.7% lower than in New Zealand.
- Productivity in Dunedin City increased by 0.4% from a year earlier compared with an decrease of 0% in New Zealand).
- Productivity growth in Dunedin City averaged 1.0%pa over the last ten years compared with an average of 0.9%pa in New Zealand.

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**Dunedin City Annual Economic Profile 2020**

Figure 13: Productivity growth, 2001-2020



## What are the most productive industries in Dunedin City

This section ranks industries according to their level of GDP per employee in Dunedin City. The level of GDP per employee may differ between industries because of the skill levels of workers and their inherent efficiency, as well as due to different amounts of machinery, technology, and land being used as production inputs. Table 11 below ranks broad industries by GDP per employee in Dunedin City and shows the corresponding GDP per employee in the national economy. Since the capital intensity of industries is often a significant explainer of productivity we also show the capital intensity of each industry in the table. Capital intensity is measured as the share of GDP which is attributable to capital. Industries with a high proportion are thus highly capital intensive.

**Table 11: ANZSIC 1-digit industries ranked by productivity, 2020**

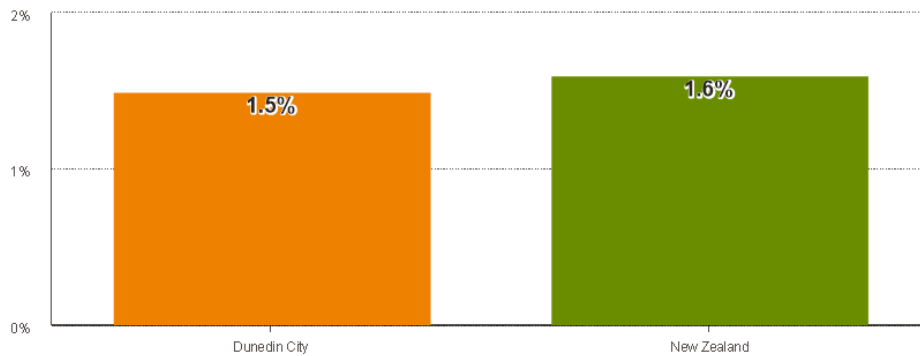
| Industry  | Productivity   |                | Capital intensity |
|---|----------------|----------------|-------------------|
|   | Dunedin City   | New Zealand    | New Zealand       |
| Electricity, Gas, Water and Waste Services      | 704,230        | 483,361        | -                 |
| Mining  | 479,016        | 642,217        | -                 |
| Rental, Hiring and Real Estate Services         | 262,592        | 339,422        | -                 |
| Financial and Insurance Services                | 193,955        | 274,046        | -                 |
| Information Media and Telecommunications        | 123,408        | 293,069        | -                 |
| Transport, Postal and Warehousing               | 119,381        | 125,629        | -                 |
| Agriculture, Forestry and Fishing               | 109,168        | 114,512        | -                 |
| Professional, Scientific and Technical Services | 102,874        | 111,563        | -                 |
| Construction                                    | 94,562         | 82,963         | -                 |
| Public Administration and Safety                | 91,611         | 109,680        | -                 |
| Wholesale Trade                                 | 89,488         | 129,675        | -                 |
| Manufacturing                                   | 79,796         | 125,532        | -                 |
| Education and Training                          | 68,113         | 60,356         | -                 |
| Health Care and Social Assistance               | 66,415         | 75,217         | -                 |
| Arts and Recreation Services                    | 61,844         | 87,683         | -                 |
| Retail Trade                                    | 61,253         | 69,335         | -                 |
| Administrative and Support Services             | 49,912         | 50,964         | -                 |
| Accommodation and Food Services                 | 42,434         | 39,259         | -                 |
| Other Services                                  | 41,618         | 56,307         | -                 |
| <b>Total</b>                                    | <b>101,582</b> | <b>124,988</b> |                   |

## BUSINESS GROWTH

### How fast did the number of business units grow in Dunedin City?

Growth in the number of business units is an indicator of entrepreneurial activity. It indicates an environment in which entrepreneurs are prepared to take risks to start new ventures. This section contrasts Dunedin City's recent performance in business unit growth with other regions in the country.

Figure 14: Business unit growth, year to Mar 2020

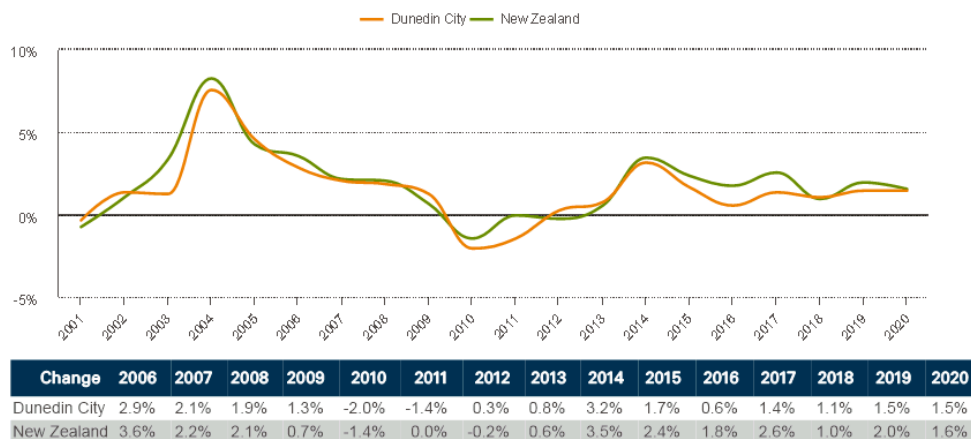


- A total of 12,084 business units were recorded in Dunedin City in 2020, up 1.5% from a year earlier.
- The number of business units in New Zealand increased by 1.6% over the same period.
- Growth in the number of business units in Dunedin City averaged 1.1%pa over the past 10 years compared with 1.5%pa in the national economy.
- Business unit growth in Dunedin City varied from a high of 7.6% in 2004 to a low of -2.0% in 2010.

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**Dunedin City Annual Economic Profile 2020**

Figure 15: Annual average business unit growth, 2001-2020



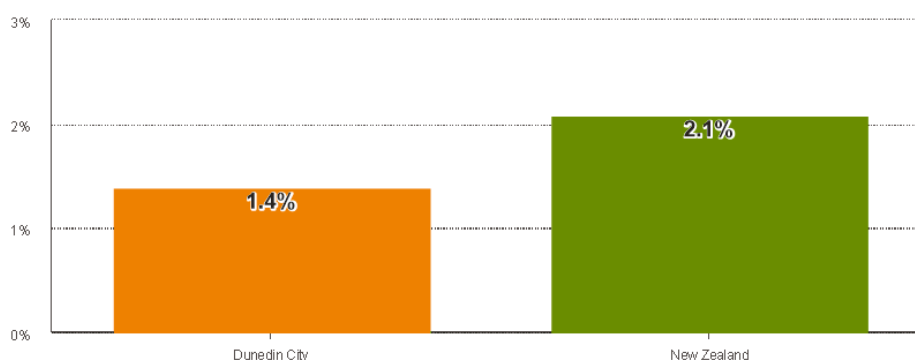


## POPULATION GROWTH

### How fast has Dunedin City's population grown?

Population growth is an indicator of a region's attractiveness as a place to live and work. A strong regional economy with plentiful job opportunities will help a region retain its population and attract new residents from other regions and abroad. This section contrasts Dunedin City's recent population growth with other districts and the country as a whole.

Figure 16: Population growth, year to Jun 2020



- Dunedin City's population was 134,100 in 2020, up 1.4% from a year earlier. New Zealand's total population grew by 2.1% over the same period.
- Population growth in Dunedin City averaged 1.2%pa over the last 5 years compared with 2.0%pa in New Zealand.
- Since 1996 growth in Dunedin City reached a high of 1.4%pa in 2016 and a low of -0.3%pa in 1997.

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**Dunedin City Annual Economic Profile 2020**

Figure 17: Annual population growth, 1997-2020

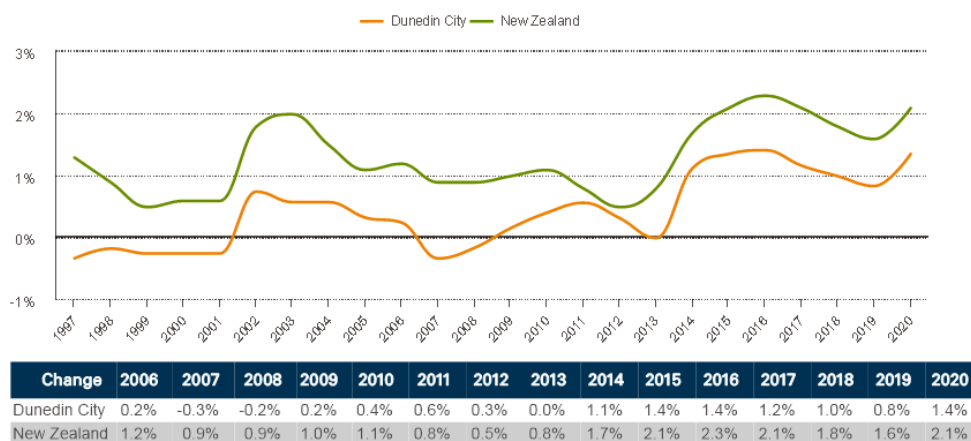
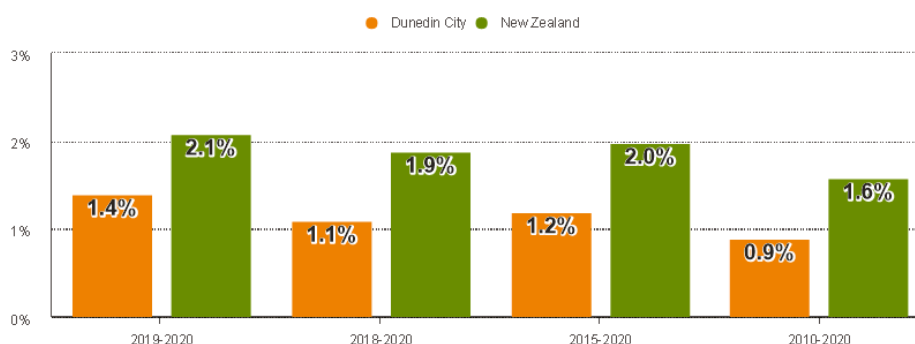


Figure 18: Population growth over the last 1, 2, 5, and 10 years



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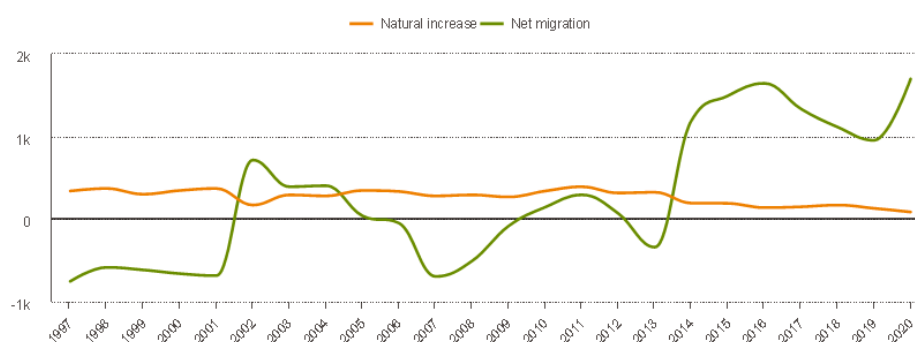
Dunedin City Annual Economic Profile 2020

## What is the source of Dunedin City's population growth?

A region's population can grow through natural growth (births less deaths) and net migration (arrivals less departures). This section describes the relative contributions of these two sources to population growth in Dunedin City.

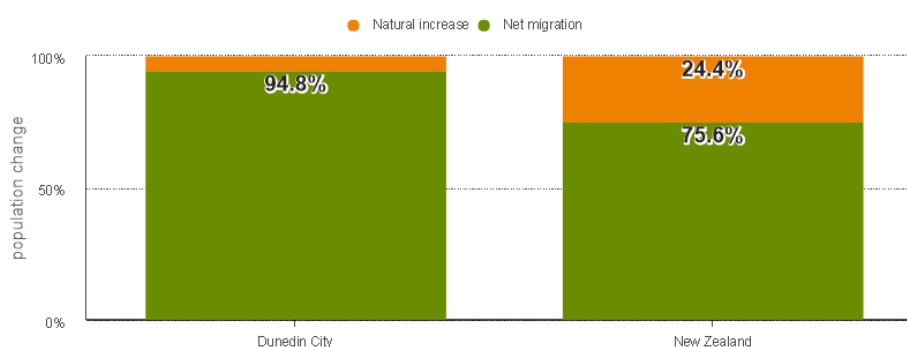
- Dunedin City's population increased by 1,800 people in the year to June 2020. This net increase was made up of net migration of 1,707 and natural increase of 93.

Figure 19: Population source of Dunedin City, 1997-2020



- The relative contribution of net migration to natural growth in Dunedin City was higher than New Zealand in 2020.

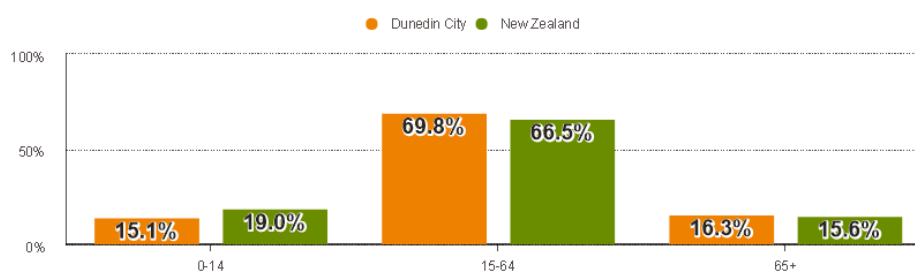
Figure 20: Sources of population growth, 2020



## What is the age structure of Dunedin City's population?

- In 2020, 69.8% of Dunedin City's population was of working age (15-64). This was significantly higher than the proportion of the national population (66.5%).
- Dunedin City had a slightly lower proportion (15.1%) of young people (0-14) than the country as a whole (19.0%) and a significantly higher proportion (16.3%) of people 65 years and older compared with New Zealand (15.6%).
- Overall the dependency ratio in Dunedin City (43.2%) was lower than in the national economy (50.3%). The dependency ratio expresses the number of persons outside of the working age as a proportion of the number of persons of working age (15 to 64 years).

Figure 21: Age composition of the population, year to June 2020



## STANDARD OF LIVING

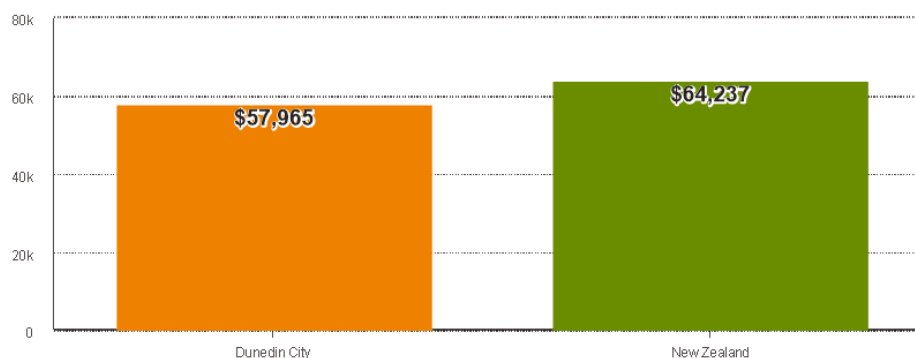
This section describes a few indicators of economic standard of living. It investigates average earnings, house prices and housing affordability.

### What are the mean earnings in Dunedin City?

**Income earned** in employment is an important source of household income, well-being and choices available. Average earnings in an area are determined by a number of factors including the industries in the area, the skills required in these industries and the ability of employers to find appropriately skilled labour.

This section looks at how average annual earnings in the Dunedin City has changed over time and how this compares against annual average earnings nationally.

Figure 22: Earnings, 2020

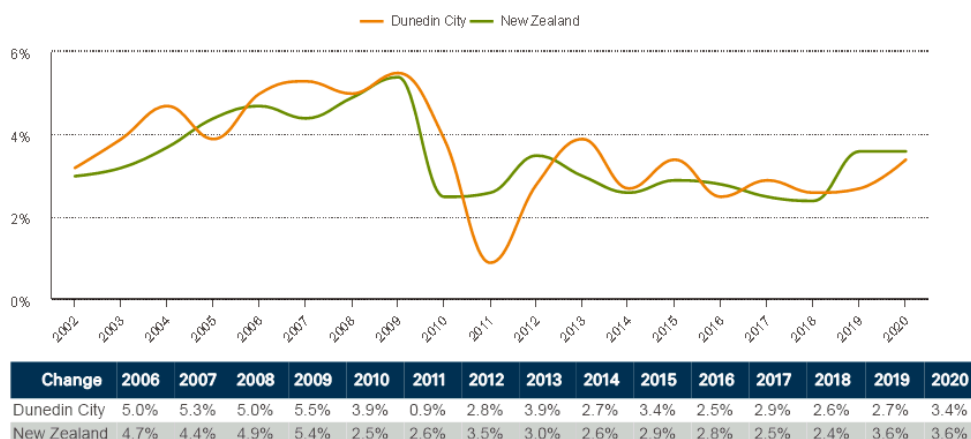


- Mean annual earnings in Dunedin City was \$57,965 in the year to March 2020, which was lower than the New Zealand mean of \$64,237.
- Mean earnings in Dunedin City increased by 3.4% over the year to March 2020 compared with an increase of 3.6% in New Zealand.
- Over the last ten years earnings growth in Dunedin City reached a maximum of 5.5% in 2009 and a minimum of 0.9% in 2011.

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**Dunedin City Annual Economic Profile 2020**

Figure 23: Annual earnings growth, 2002-2020

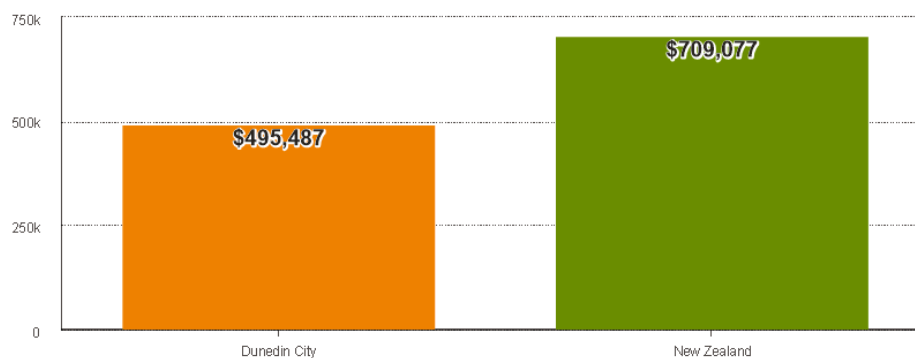


- Mean annual earnings in Dunedin City was \$57,965 in the year to March 2020, which was lower than the New Zealand mean of \$64,237.
- Mean earnings in Dunedin City increased by 3.4% over the year to March 2020 compared with an increase of 3.6% in New Zealand.
- Over the last ten years earnings growth in Dunedin City reached a maximum of 5.5% in 2009 and a minimum of 0.9% in 2011.

## How do house prices in Dunedin City compare?

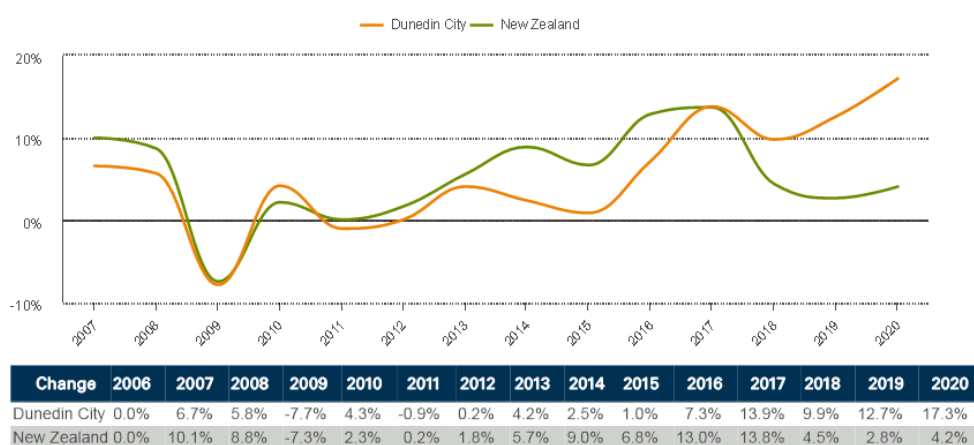
The cost of housing is a major component of household spending. This section describes the cost of housing in Dunedin City relative to the rest of the country.

Figure 24: Average current house value, 2020



- The Average current house value in Dunedin City was \$495,487 in 2020, which was lower than the New Zealand median of \$709,077.
- House price growth in Dunedin City was 17.3% for the year to March 2020. Growth was stronger than in New Zealand (4.2%).

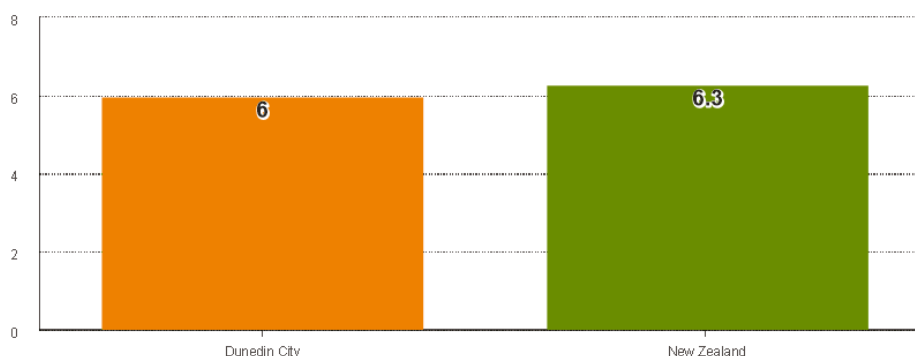
Figure 25: Annual Average current house value growth, 2007-2020



## How affordable is housing in Dunedin City?

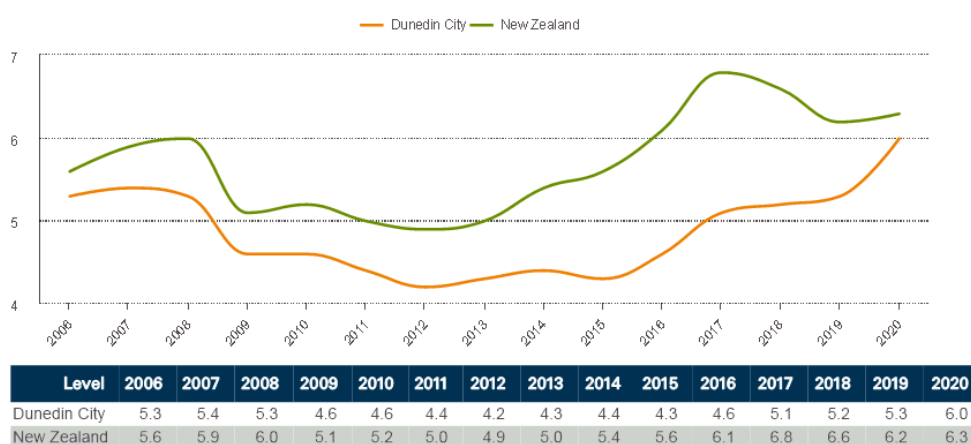
This section investigates the affordability of housing by comparing average current house values with average earnings. We have estimated a housing affordability index which is the ratio of the average current house value to annual average earnings measured in the Linked Employer Employee Data. A higher ratio therefore indicates lower housing affordability.

Figure 26: Housing affordability index, 2020



- The housing affordability index in Dunedin City was 6.0 in the year to March 2020, which was lower than New Zealand's index of 6.3. This means that housing is more affordable in Dunedin City than in New Zealand.

Figure 27: Housing affordability, 2006-2020





## WORKFORCE AND SKILLS

### How do skill levels in Dunedin City compare with New Zealand?

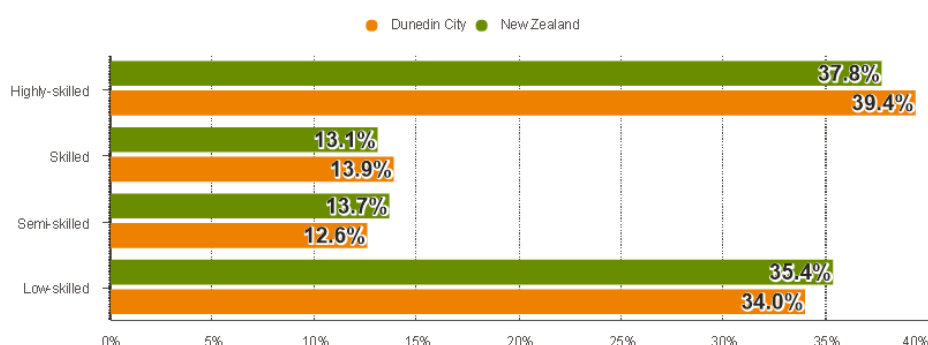
A region that can offer high skilled jobs can generally offer a higher standard of living to its residents. It is also has a better chance of retaining its residents and attracting new skills. This section contrasts the skill levels required by jobs in Dunedin City with those required in the national economy. The broad skill categories used are defined in the technical section at the end of the report.

Table 12: Employment by broad skill level, 2020

| Skill level    | Dunedin City  |             | New Zealand      |             |
|----------------|---------------|-------------|------------------|-------------|
|                | Jobs          | % of total  | Jobs             | % of total  |
| Highly-skilled | 26,054        | 39.4%       | 979,789          | 37.8%       |
| Skilled        | 9,205         | 13.9%       | 338,765          | 13.1%       |
| Semi-skilled   | 8,348         | 12.6%       | 355,374          | 13.7%       |
| Low-skilled    | 22,500        | 34.0%       | 918,459          | 35.4%       |
| <b>Total</b>   | <b>66,107</b> | <b>100%</b> | <b>2,592,389</b> | <b>100%</b> |

- Approximately 39.4% of Dunedin City's workforce was employed in highly skilled occupations in 2020. This is higher than in New Zealand (37.8%).
- Approximately 34.0% of Dunedin City's workforce was employed in low-skilled occupations in 2020. This is lower than in New Zealand 35.4%.

Figure 28: Employment by broad skill level, 2020



## What is the occupational structure of employment in Dunedin City?

This section describes the types of occupations that are employed in Dunedin City. The following graph shows the distribution of employment across broad occupational categories (1-digit occupations).

- Professionals accounted for the largest share of employment (28.3%) in Dunedin City, which is higher than New Zealand (24.3%).
- Managers accounted for the second largest share of employment (15.8%) in Dunedin City, which is lower than New Zealand (18.0%).
- Machinery operators and drivers accounted for the lowest share of employment (4.3%) in Dunedin City, which is lower than New Zealand (5.3%).

Figure 29: Employment by broad occupation, 2020

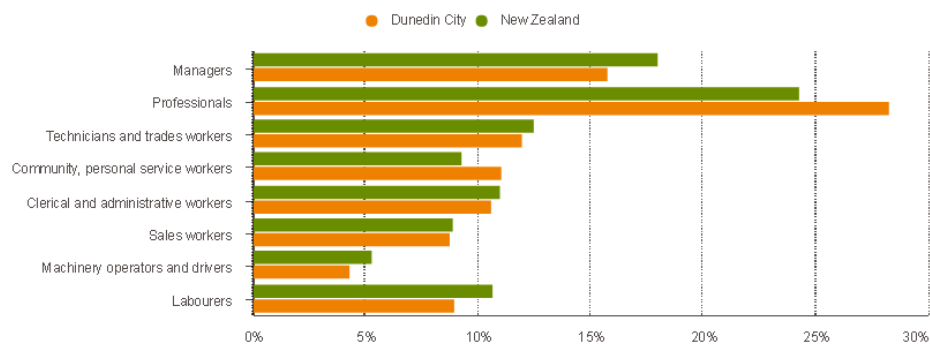


Table 13 shows a ranking of employment by 2-digit occupations.

- Education Professionals is the largest 2-digit occupation in Dunedin City, accounting for 8.3% of employment. By comparison 5.8% of the national workforce are employed as education professionals.
- The next largest 2-digit occupations in Dunedin City are specialist managers (7.6%) and health professionals (6.2%).

**Table 13: Employment by ANZSIC 2-digit occupation, 2020**

| Occupation                                 | Dunedin City  |             | New Zealand      |             |
|--|---------------|-------------|------------------|-------------|
|  | Employment    | % of total  | Employment       | % of total  |
| Education Professionals                    | 5,481         | 8.3%        | 150,204          | 5.8%        |
| Specialist Managers                        | 5,011         | 7.6%        | 216,009          | 8.3%        |
| Health Professionals                       | 4,073         | 6.2%        | 107,032          | 4.1%        |
| Sales Assistants & Salespersons            | 3,312         | 5.0%        | 123,965          | 4.8%        |
| Business, HR & Marketing Professionals     | 3,240         | 4.9%        | 138,429          | 5.3%        |
| Carers & Aides                             | 2,804         | 4.2%        | 87,144           | 3.4%        |
| Hospitality, Retail & Service Managers     | 2,660         | 4.0%        | 95,098           | 3.7%        |
| Chief Execs, General Managers, Legislators | 2,086         | 3.2%        | 90,711           | 3.5%        |
| Design, Engineering, Science Professionals | 2,008         | 3.0%        | 90,214           | 3.5%        |
| Legal, Social & Welfare Professionals      | 1,953         | 3.0%        | 58,092           | 2.2%        |
| Office Managers & Program Administrators   | 1,729         | 2.6%        | 67,171           | 2.6%        |
| Other Labourers                            | 1,696         | 2.6%        | 70,062           | 2.7%        |
| Cleaners & Laundry Workers                 | 1,689         | 2.6%        | 55,723           | 2.1%        |
| Sales Representatives & Agents             | 1,680         | 2.5%        | 78,627           | 3.0%        |
| Construction Trades Workers                | 1,555         | 2.4%        | 65,521           | 2.5%        |
| Hospitality Workers                        | 1,501         | 2.3%        | 50,990           | 2.0%        |
| Automotive & Engineering Trades Workers    | 1,453         | 2.2%        | 65,091           | 2.5%        |
| Road & Rail Drivers                        | 1,349         | 2.0%        | 55,672           | 2.1%        |
| General Clerical Workers                   | 1,305         | 2.0%        | 49,416           | 1.9%        |
| Engineering, ICT & Science Technicians     | 1,296         | 2.0%        | 50,639           | 2.0%        |
| ICT Professionals                          | 1,256         | 1.9%        | 62,227           | 2.4%        |
| Food Trades Workers                        | 1,183         | 1.8%        | 44,028           | 1.7%        |
| Sports & Personal Service Workers          | 1,109         | 1.7%        | 42,620           | 1.6%        |
| Protective Service Workers                 | 1,074         | 1.6%        | 34,722           | 1.3%        |
| Inquiry Clerks & Receptionists             | 1,051         | 1.6%        | 36,250           | 1.4%        |
| Other Technicians & Trades Workers         | 1,035         | 1.6%        | 39,308           | 1.5%        |
| Other Clerical & Administrative Workers    | 1,004         | 1.5%        | 44,712           | 1.7%        |
| Numerical Clerks                           | 938           | 1.4%        | 46,892           | 1.8%        |
| Health & Welfare Support Workers           | 872           | 1.3%        | 25,970           | 1.0%        |
| Sales Support Workers                      | 815           | 1.2%        | 28,679           | 1.1%        |
| Electrotech & Telecoms Trades Workers      | 804           | 1.2%        | 32,566           | 1.3%        |
| Arts & Media Professionals                 | 716           | 1.1%        | 23,543           | 0.9%        |
| Farm, Forestry & Garden Workers            | 709           | 1.1%        | 53,701           | 2.1%        |
| Factory Process Workers                    | 685           | 1.0%        | 49,799           | 1.9%        |
| Farmers & Farm Managers                    | 679           | 1.0%        | 63,804           | 2.5%        |
| Machine & Stationary Plant Operators       | 652           | 1.0%        | 34,944           | 1.3%        |
| Construction & Mining Labourers            | 621           | 0.9%        | 27,960           | 1.1%        |
| Skilled Animal & Horticultural Workers     | 600           | 0.9%        | 27,074           | 1.0%        |
| Personal Assistants & Secretaries          | 585           | 0.9%        | 21,679           | 0.8%        |
| Food Preparation Assistants                | 579           | 0.9%        | 20,432           | 0.8%        |
| Storepersons                               | 447           | 0.7%        | 23,779           | 0.9%        |
| Mobile Plant Operators                     | 421           | 0.6%        | 23,859           | 0.9%        |
| Clerical & Office Support Workers          | 393           | 0.6%        | 18,031           | 0.7%        |
| <b>Total employment</b>                    | <b>66,107</b> | <b>100%</b> | <b>2,592,389</b> | <b>100%</b> |

## Employment in knowledge intensive industries in Dunedin City

Knowledge intensive industries are those in which the generation and exploitation of knowledge play the predominant part in the creation of wealth. These sectors represent an increasing share of the New Zealand economy's output and employment, and will most likely be the source of future productivity growth.

An industry is defined as knowledge-intensive if it meets two criteria: at least 25 per cent of the workforce is qualified to degree level and at least 30 per cent of the workforce is in professional, managerial and scientific and technical occupations. Further details of the definition are providing in the technical notes at the end of the report.

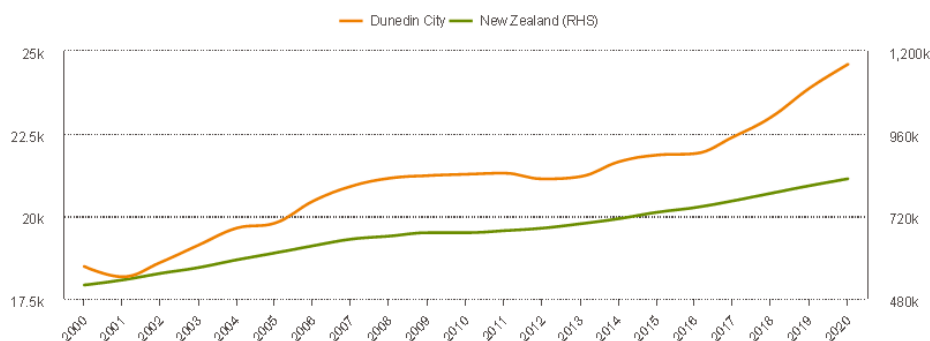
This section describes employment in knowledge intensive industries in Dunedin City.

**Table 14: Employment in knowledge intensive industries, 2020**

|              | Employment in KI industries 2020 | KI employment as share of total employment 2020 | Annual growth in KI employment 2020 | Annual average growth in KI employment 2010-2020 |
|--------------|----------------------------------|---|-------------------------------------|--|
| Dunedin City | 24,626                           | 37.3%   | 3.0%                                | 1.5%   |
| New Zealand  | 831,101                          | 32.1%   | 2.5%                                | 2.1%   |

- During 2020, there were 24,626 jobs in Dunedin City's knowledge intensive industries. At 37.3% of total employment, this was higher than in New Zealand (32.1%).
- During the year to March 2020, growth in employment in knowledge intensive industries was 3.0%, compared with a change of 2.5% in New Zealand.

**Figure 30: Employment in knowledge intensive industries, 2000-2020**



## What are the top knowledge intensive industries in Dunedin City?

Table 15: Top 30 knowledge intensive industries in Dunedin City, 2020

| Rank | Industry   | Dunedin City |                       | New Zealand |                       |
|------|--|--------------|-----------------------|-------------|-----------------------|
|      |  | Employment   | % of total employment | Employment  | % of total employment |
| 1    | Higher Education                                       | 4,665        | 7.1%                  | 36,115      | 1.4%                  |
| 2    | Hospitals (except Psychiatric Hospitals)               | 3,744        | 5.7%                  | 75,871      | 2.9%                  |
| 3    | Primary Education                                      | 1,279        | 1.9%                  | 55,142      | 2.1%                  |
| 4    | Central Government Administration                      | 1,140        | 1.7%                  | 42,486      | 1.6%                  |
| 5    | Technical and Vocational Education and Training        | 924          | 1.4%                  | 10,334      | 0.4%                  |
| 6    | Secondary Education                                    | 882          | 1.3%                  | 36,327      | 1.4%                  |
| 7    | Computer Systems Design and Related Services           | 719          | 1.1%                  | 45,829      | 1.8%                  |
| 8    | Other Allied Health Services                           | 692          | 1.0%                  | 34,993      | 1.3%                  |
| 9    | Management Advice and Other Consulting Services        | 628          | 0.9%                  | 42,906      | 1.7%                  |
| 10   | Accounting Services                                    | 592          | 0.9%                  | 25,344      | 1.0%                  |
| 11   | Engineering Design and Engineering Consulting Services | 582          | 0.9%                  | 30,493      | 1.2%                  |
| 12   | Local Government Administration                        | 544          | 0.8%                  | 24,982      | 1.0%                  |
| 13   | Legal Services   | 513          | 0.8%                  | 19,791      | 0.8%                  |
| 14   | Other Interest Group Services n.e.c.                   | 429          | 0.6%                  | 13,979      | 0.5%                  |
| 15   | General Practice Medical Services                      | 403          | 0.6%                  | 16,630      | 0.6%                  |
| 16   | Employment Placement and Recruitment Services          | 378          | 0.6%                  | 19,443      | 0.7%                  |
| 17   | Pathology and Diagnostic Imaging Services              | 344          | 0.5%                  | 5,069       | 0.2%                  |
| 18   | Other Health Care Services n.e.c.                      | 342          | 0.5%                  | 8,468       | 0.3%                  |
| 19   | Pharmaceutical, Cosmetic and Toiletry Goods Retailing  | 337          | 0.5%                  | 11,565      | 0.4%                  |
| 20   | Museum Operation                                       | 304          | 0.5%                  | 2,979       | 0.1%                  |
| 21   | Dental Services  | 290          | 0.4%                  | 7,986       | 0.3%                  |
| 22   | Adult, Community and Other Education n.e.c.            | 273          | 0.4%                  | 12,734      | 0.5%                  |
| 23   | Corporate Head Office Management Services              | 263          | 0.4%                  | 26,276      | 1.0%                  |
| 24   | Religious Services                                     | 248          | 0.4%                  | 9,561       | 0.4%                  |
| 25   | Combined Primary and Secondary Education               | 216          | 0.3%                  | 6,098       | 0.2%                  |
| 26   | Architectural Services                                 | 215          | 0.3%                  | 10,229      | 0.4%                  |
| 27   | Specialist Medical Services                            | 213          | 0.3%                  | 5,812       | 0.2%                  |
| 28   | Physiotherapy Services                                 | 194          | 0.3%                  | 4,645       | 0.2%                  |
| 29   | Scientific Research Services                           | 192          | 0.3%                  | 8,760       | 0.3%                  |
| 30   | Scientific Testing and Analysis Services               | 186          | 0.3%                  | 5,526       | 0.2%                  |

## Which qualifications are in demand in Dunedin City?

This section examines the types of qualifications, in terms of NZQA level and field of study, that are in demand in Dunedin City. The demand for qualifications is derived from our estimates of the demand for occupations by using assumptions about the types of qualifications which are ideally required for each occupation. Thus our estimates do not describe the educational profile of the region's workforce but rather the type of qualifications that are ideally required in the region. Further details are provided in the technical notes at the end.

**Table 16: Employment by level of qualification and field of study in Dunedin City, 2020**

| Field of study                                 | Certificate<br>(level 1-3) | Certificate<br>(level 4) | Diploma<br>(level 5-6) | Degree<br>(level 7+) | Total  |
|--|----------------------------|--------------------------|------------------------|----------------------|--------|
| <b>Number</b>                                  |                            |                          |                        |                      |        |
| Natural and Physical Sciences                  | 993                        | 199                      | 519                    | 1,648                | 3,359  |
| Information Technology                         | 938                        | 102                      | 258                    | 927                  | 2,224  |
| Engineering and Related Technologies           | 3,874                      | 3,170                    | 1,232                  | 2,478                | 10,754 |
| Architecture and Building                      | 1,330                      | 2,242                    | 439                    | 712                  | 4,724  |
| Agriculture, Environmental and Related Studies | 1,073                      | 526                      | 184                    | 418                  | 2,201  |
| Health   | 2,016                      | 430                      | 813                    | 4,712                | 7,971  |
| Education                                      | 1,308                      | 195                      | 366                    | 3,329                | 5,199  |
| Management and Commerce                        | 5,183                      | 971                      | 1,868                  | 4,327                | 12,349 |
| Society and Culture                            | 3,338                      | 673                      | 1,217                  | 4,217                | 9,444  |
| Creative Arts                                  | 1,665                      | 378                      | 408                    | 1,512                | 3,964  |
| Food, Hospitality and Personal Services        | 1,942                      | 1,278                    | 436                    | 263                  | 3,919  |
| Totals   | 23,659                     | 10,164                   | 7,739                  | 24,544               | 66,107 |
| <b>% of total</b>                              |                            |                          |                        |                      |        |
| Natural and Physical Sciences                  | 1.5%                       | 0.3%                     | 0.8%                   | 2.5%                 | 5.1%   |
| Information Technology                         | 1.4%                       | 0.2%                     | 0.4%                   | 1.4%                 | 3.4%   |
| Engineering and Related Technologies           | 5.9%                       | 4.8%                     | 1.9%                   | 3.7%                 | 16.3%  |
| Architecture and Building                      | 2.0%                       | 3.4%                     | 0.7%                   | 1.1%                 | 7.1%   |
| Agriculture, Environmental and Related Studies | 1.6%                       | 0.8%                     | 0.3%                   | 0.6%                 | 3.3%   |
| Health   | 3.0%                       | 0.7%                     | 1.2%                   | 7.1%                 | 12.1%  |
| Education                                      | 2.0%                       | 0.3%                     | 0.6%                   | 5.0%                 | 7.9%   |
| Management and Commerce                        | 7.8%                       | 1.5%                     | 2.8%                   | 6.5%                 | 18.7%  |
| Society and Culture                            | 5.0%                       | 1.0%                     | 1.8%                   | 6.4%                 | 14.3%  |
| Creative Arts                                  | 2.5%                       | 0.6%                     | 0.6%                   | 2.3%                 | 6.0%   |
| Food, Hospitality and Personal Services        | 2.9%                       | 1.9%                     | 0.7%                   | 0.4%                 | 5.9%   |
| Totals   | 35.8%                      | 15.4%                    | 11.7%                  | 37.1%                | 100%   |

- The greatest demand in Dunedin City in 2020 was for qualifications at the level of Degree (level 7+). Approximately 37.1% of all positions in Dunedin City required this level of qualification.
- By field of study, the highest demand was for Management and Commerce. Approximately 18.7% of all positions in Dunedin City required this field of study.

**Table 17: Change in employment by level of qualification and field of study in Dunedin City, 2010-2020**

| Field of study                                 | Certificate<br>(level 1-3) | Certificate<br>(level 4) | Diploma<br>(level 5-6) | Degree<br>(level 7+) | Total |
|--|----------------------------|--------------------------|------------------------|----------------------|-------|
| <b>Absolute change</b>                         |                            |                          |                        |                      |       |
| Natural and Physical Sciences                  | -15                        | 10                       | 46                     | 225                  | 266   |
| Information Technology                         | -12                        | 6                        | 28                     | 225                  | 247   |
| Engineering and Related Technologies           | 111                        | 232                      | 103                    | 376                  | 822   |
| Architecture and Building                      | 81                         | 351                      | 91                     | 111                  | 634   |
| Agriculture, Environmental and Related Studies | -21                        | 14                       | 27                     | 51                   | 71    |
| Health   | 23                         | 32                       | 139                    | 915                  | 1,109 |
| Education                                      | 22                         | 1                        | 68                     | 435                  | 525   |
| Management and Commerce                        | -165                       | 1                        | 294                    | 495                  | 625   |
| Society and Culture                            | 35                         | 20                       | 222                    | 445                  | 722   |
| Creative Arts                                  | -19                        | 13                       | 54                     | 218                  | 266   |
| Food, Hospitality and Personal Services        | -7                         | 179                      | 60                     | 30                   | 261   |
| Totals   | 33                         | 858                      | 1,133                  | 3,523                | 5,547 |
| <b>annual average % change</b>                 |                            |                          |                        |                      |       |
| Natural and Physical Sciences                  | -0.1%                      | 0.5%                     | 0.9%                   | 1.5%                 | 0.8%  |
| Information Technology                         | -0.1%                      | 0.6%                     | 1.2%                   | 2.8%                 | 1.2%  |
| Engineering and Related Technologies           | 0.3%                       | 0.8%                     | 0.9%                   | 1.7%                 | 0.8%  |
| Architecture and Building                      | 0.6%                       | 1.7%                     | 2.4%                   | 1.7%                 | 1.5%  |
| Agriculture, Environmental and Related Studies | -0.2%                      | 0.3%                     | 1.6%                   | 1.3%                 | 0.3%  |
| Health   | 0.1%                       | 0.8%                     | 1.9%                   | 2.2%                 | 1.5%  |
| Education                                      | 0.2%                       | 0.0%                     | 2.1%                   | 1.4%                 | 1.1%  |
| Management and Commerce                        | -0.3%                      | 0.0%                     | 1.7%                   | 1.2%                 | 0.5%  |
| Society and Culture                            | 0.1%                       | 0.3%                     | 2.0%                   | 1.1%                 | 0.8%  |
| Creative Arts                                  | -0.1%                      | 0.3%                     | 1.4%                   | 1.6%                 | 0.7%  |
| Food, Hospitality and Personal Services        | 0.0%                       | 1.5%                     | 1.5%                   | 1.2%                 | 0.7%  |
| Totals   | 0.0%                       | 0.9%                     | 1.6%                   | 1.6%                 | 100%  |

- The number of positions in Dunedin City requiring a Degree (level 7+) increased by 3,523 between 2010 and 2020, ranking it as the qualification level with the largest absolute increase in demand.
- By field of study, Health experienced the highest increase in demand between 2010 and 2020. The number of positions requiring this field of study increased by 1,109 over the 10 year period.

## TOURISM

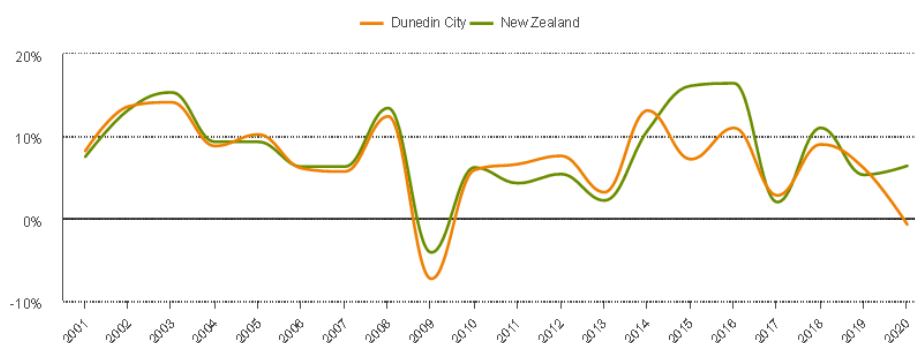
Tourism has grown rapidly in New Zealand since 2000. Not only has the number of overseas tourist arrivals increased substantially, but the level of domestic tourism has also expanded rapidly as spending on leisure by New Zealand residents increased. This section describes the contribution of tourism to Dunedin City's economy.

### Tourism GDP

Table 18: Tourism GDP, 2001-2020

| Year | Dunedin City |        | New Zealand |        |
|------|--------------|--------|-------------|--------|
|      | Level        | Change | Level       | Change |
| 2000 | \$104m       |        | \$3,451m    |        |
| 2001 | \$113m       | 8.3%   | \$3,712m    | 7.6%   |
| 2002 | \$128m       | 13.7%  | \$4,206m    | 13.3%  |
| 2003 | \$146m       | 14.2%  | \$4,853m    | 15.4%  |
| 2004 | \$159m       | 8.9%   | \$5,308m    | 9.4%   |
| 2005 | \$176m       | 10.3%  | \$5,809m    | 9.4%   |
| 2006 | \$187m       | 6.2%   | \$6,180m    | 6.4%   |
| 2007 | \$197m       | 5.8%   | \$6,575m    | 6.4%   |
| 2008 | \$222m       | 12.5%  | \$7,462m    | 13.5%  |
| 2009 | \$206m       | -7.2%  | \$7,161m    | -4.0%  |
| 2010 | \$218m       | 6.0%   | \$7,616m    | 6.3%   |
| 2011 | \$233m       | 6.7%   | \$7,951m    | 4.4%   |
| 2012 | \$251m       | 7.7%   | \$8,388m    | 5.5%   |
| 2013 | \$259m       | 3.3%   | \$8,582m    | 2.3%   |
| 2014 | \$293m       | 13.2%  | \$9,506m    | 10.8%  |
| 2015 | \$315m       | 7.3%   | \$11,050m   | 16.2%  |
| 2016 | \$350m       | 11.1%  | \$12,873m   | 16.5%  |
| 2017 | \$360m       | 2.9%   | \$13,146m   | 2.1%   |
| 2018 | \$393m       | 9.1%   | \$14,610m   | 11.1%  |
| 2019 | \$417m       | 6.2%   | \$15,397m   | 5.4%   |
| 2020 | \$415m       | -0.6%  | \$16,400m   | 6.5%   |

Figure 31: Annual average tourism GDP growth, 2001-2020





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**Dunedin City Annual Economic Profile 2020**

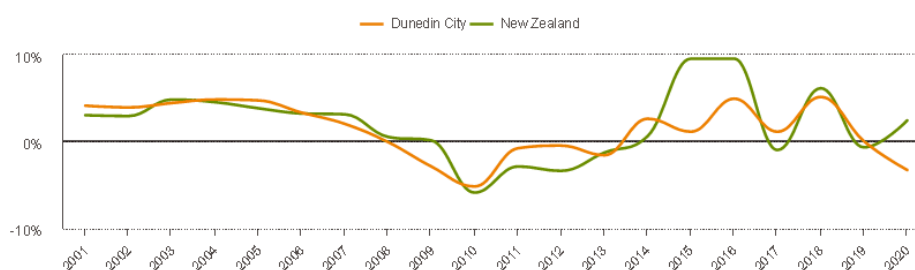
- The tourism industry contributed \$415m towards GDP in Dunedin City in 2020. This amounted to 6.2% of the Dunedin City's economic output in 2020, up from 3.9% ten years ago.
- Economic output in Dunedin City's tourism industry declined by -0.6% in 2020, compared with a 6.5% increase in New Zealand.
- Growth in the industry in Dunedin City has averaged 6.6% over the last ten years, compared with 8.0% in New Zealand.

## Tourism Employment

Table 19: Tourism employment, 2001-2020

| Year | Dunedin City |        | New Zealand |        |
|------|--------------|--------|-------------|--------|
|      | Level        | Change | Level       | Change |
| 2000 | 4,501        |        | 152,607     |        |
| 2001 | 4,692        | 4.2%   | 157,386     | 3.1%   |
| 2002 | 4,878        | 4.0%   | 162,042     | 3.0%   |
| 2003 | 5,096        | 4.5%   | 169,965     | 4.9%   |
| 2004 | 5,348        | 4.9%   | 177,861     | 4.6%   |
| 2005 | 5,607        | 4.8%   | 184,761     | 3.9%   |
| 2006 | 5,798        | 3.4%   | 190,893     | 3.3%   |
| 2007 | 5,919        | 2.1%   | 197,025     | 3.2%   |
| 2008 | 5,920        | 0.0%   | 198,216     | 0.6%   |
| 2009 | 5,753        | -2.8%  | 198,555     | 0.2%   |
| 2010 | 5,457        | -5.1%  | 187,083     | -5.8%  |
| 2011 | 5,421        | -0.7%  | 181,881     | -2.8%  |
| 2012 | 5,400        | -0.4%  | 175,863     | -3.3%  |
| 2013 | 5,320        | -1.5%  | 173,724     | -1.2%  |
| 2014 | 5,462        | 2.7%   | 175,023     | 0.7%   |
| 2015 | 5,525        | 1.2%   | 191,796     | 9.6%   |
| 2016 | 5,802        | 5.0%   | 210,126     | 9.6%   |
| 2017 | 5,870        | 1.2%   | 208,323     | -0.9%  |
| 2018 | 6,176        | 5.2%   | 221,157     | 6.2%   |
| 2019 | 6,180        | 0.1%   | 219,867     | -0.6%  |
| 2020 | 5,981        | -3.2%  | 225,384     | 2.5%   |

Figure 32: Annual average tourism employment growth, 2001-2020



- The tourism industry employed an average of 5,981 people in Dunedin City in 2020. This amounted to 9.0% of the Dunedin City's total employment in 2020, up from 9.0% in 2010.
- Employment growth in the industry in Dunedin City has averaged 0.9% over the last ten years, compared with 1.9% in New Zealand.
- Employment in the tourism industry declined by -3.2% in 2020, compared with a 2.5% increase in New Zealand.

## TECHNICAL NOTES

### Time period

This economic profile reports on March years (eg 2020 refers to the 12 months to March 2020) for all indicators except population (as at June) and dairy sector statistics (May year) and business units (snapshot as at February).

### Broad economic sectors

Primary industries extract or harvest products from the earth and include agriculture, forestry, fishing, and mining. Goods-producing industries produce manufactured and other processed goods and include manufacturing, electricity, gas and water, and construction. High-value services include **knowledge intensive** service industries. Other services include all service industries that are not knowledge intensive, such as retail trade, and food and accommodation services. 'Other' includes owner occupied property operation and **unallocated** activity.

### Broad skill levels

*Highly skilled* occupations typically require a bachelor degree or higher qualification and include professionals such as accountants, teachers, and engineers, as well as most managers such as chief executives. This category is consistent with skill level one of the Australia New Zealand Standard Classification of Occupations (ANZSCO).

*Medium-high skilled* occupations typically require an NZ Register Diploma, an Associate Degree or Advanced Diploma. The category includes some managers (such as retail managers) and technicians (such as architectural draftspersons, ICT support technicians and dental hygienists). This category is consistent with skill level two of the ANZSCO classification.

*Medium skilled* occupations typically require an NZ Register Level 4 qualification. The category includes tradespersons (such as motor mechanics), skilled service workers (such as firefighters), as well as skilled clerical and sales workers (such as legal secretaries and estate agents). This category is consistent with skill level three of the ANZSCO classification.

*Low skilled* occupations typically require an NZ Register Level 3 qualification or lower. It includes a range of lower skilled occupations from general clerks, caregivers, and sales assistants, through to cleaners and labourers. This category is consistent with skill level three and four of the ANZSCO classification.

### Business units

Data on the number of businesses is sourced from the Business Demography statistics from Statistics New Zealand. Businesses are measured by geographic units, which represent a business location engaged in one, or predominantly one, kind of economic activity at a single physical site or base (eg a factory, a farm, a shop, an office, etc). All non-trading or dormant enterprises, as well as enterprises outside of New Zealand, are excluded from business demography statistics.

The number of business units is based on a snapshot as at February each year.

A significant number of enterprises are recorded as having zero employment. Enterprises in the zero employee count size category may have:

- working owners who do not draw a wage from their business
- labour provided by other businesses or contractors
- business activity that requires no labour (eg holding company).

Only business units that are economically significant enterprises are included. To be regarded as economically significant they must meet at least one of the following criteria:

- annual expenses or sales subject to GST of more than \$30,000
- 12-month rolling mean employee count of greater than three
- part of a group of enterprises
- registered for GST and involved in agriculture or forestry
- over \$40,000 of income recorded in the IR10 annual tax return (this includes some units in residential property leasing and rental).

### Dependency ratio

The dependency ratio is the number of under 15 year olds and over 65 year olds as a ratio of the rest of the population (working age).

### Earnings

Earnings data comes from the quarterly Linked Employer Employee Data published by Statistics New Zealand. LEED publishes the mean earnings of full quarter jobs for each quarter. Full quarter jobs may include full time and part time jobs. Earnings include overtime and lump sum payments. We sum the mean earnings for the four quarters making up the year to arrive at an estimate of average annual earnings.

### Employment by industry

Employment is measured as an average of the four quarters making up each year. The unit of measurement is filled jobs.

Regional employment numbers are from Infometrics' Regional Industry Employment Model (RIEM). The model draws heavily on quarterly and annual Linked Employer Employee Data (LEED) published by Statistics New Zealand. RIEM differs from data from Business Demography in that it is a quarterly series (BD is annual) and it includes both employees and self-employed, whereas BD only includes employees.

### Employment by occupation

Employment in each industry is converted to occupational employment using the relationship between industry and occupational employment observed in various Population Censuses. The Population Census measures the occupational composition of employment in each industry and how this changes over time. Occupations confirm to the categories used in the Australian New Zealand Standard Classification of Occupations (ANZSCO).

### Employment by qualification and field of study

Employment by occupation is converted to employment by qualification using the unique matching between occupation and **the five qualification or skill levels used** in the Australian New Zealand Standard Classification of Occupations (ANZSCO). Fields of study for each combination of occupation and skill are obtained from Population Census. Shares of employment in a particular occupation and skill combination for each field of study can, thus, be aggregated into demand for labour by skill/qualification.

### Gross Domestic Product

Gross Domestic Product (GDP) measures the value economic units add to their inputs. It should not be confused with revenue or turnover.

Total GDP is calculated by summing the value added to all goods and services for final consumption – ie it does not include the value added to goods and services used as intermediate inputs for the production of other goods as this would result in double counting. As a result, GDP estimates should not be confused with revenue/turnover/gross output.

In this profile Gross Domestic Product for each region and territorial authority (TA) is estimated by Infometrics. A top down approach breaks national production-based GDP for each industry (published by Statistics New Zealand) down to territorial authority level by applying TA shares to the national total. Each TA's share of industry output is based on the share of employment measured in the Linked Employer Employee Data (LEED), which is, in turn, based on taxation data. Our estimates are benchmarked on regional GDP published by Statistics New Zealand which ensures we capture differences in regional industry productivity and changes in productivity over time.

GDP is measured in constant 2020 prices.

### Household income

The Infometrics household income series is a comprehensive estimate of average household incomes within each region or territorial authority area. The series captures labour market earnings (wages, salaries and self-employment) as well as allowances (e.g. Disability Allowance), benefits (e.g. Jobseeker Support) and superannuation. Investment income is excluded.

Infometrics models the series with a top-down approach, first measuring all incomes received by households in New Zealand, then apportioning them to smaller areas using various sources of administrative data. As there is a time lag in the availability of administrative data we use contemporary indicators to project our estimates to the most recent quarter. Infometrics estimates of the number of occupied private households are used to translate total income in each area into a per household mean.

The Infometrics household income series tends to be slightly higher than Census measures. Census tends to underestimate household incomes because individuals often fail to recall all their income when completing their Census form.

### House values

House values (dollar value) are sourced from QVNZ. The levels used are average current values. An average current value is the average (mean) value of all developed residential properties in the area based on the latest house value index from QVNZ. It is not an average or median sales price, as both of those figures only measure what happens to have sold in the period. These average current values are affected by the underlying value of houses (including those not on the market) and are quality adjusted based on the growth in each house's price between sales.

### Industrial classification

This profile uses industry categories from the 2006 Australia New Zealand Standard Industrial Classification (ANZSIC). The ANZSIC is a hierarchical classification with four levels, namely divisions (the broadest level also referred to as 1-digit categories), subdivisions (3-digit), groups (4-digit) and classes (7-digit). There are approximately 500 7-digit industries.

This profile also uses a grouping of 54 industries. These are the industries used by Statistics New Zealand in the national accounts.

### Knowledge intensive employment

Knowledge intensive employment is measured as employment in industries (measured at the 7-digit industry level) which are defined as **knowledge intensive**.

### Knowledge intensive industries

Knowledge-intensive industries are industries that satisfy two basic criteria: At least 25 per cent of the workforce must be qualified to degree level and at least 30 per cent of the workforce must be employed in professional, managerial, as well as scientific and technical occupations.

### Māori industry and occupational employment

Infometrics models Māori industry and occupational employment data by drawing on detailed data from the Census, Household Labour Force Survey (HLFS) as well as the Infometrics Regional Employment Industry Model (REIM) and the Infometrics Regional Industry-Occupational matrix.

### Population

The population numbers presented in this profile are based on Statistics New Zealand's Estimated Resident Population (ERP). The ERP is an estimate of all people who usually live in an area at a given date. Visitors from elsewhere in New Zealand or from overseas are excluded.

The ERP is not directly comparable with the census usually resident population count because of a number of adjustments. The ERP at 30 June 2018 is based on the 2018 census usually resident population count, adjusted for:

- net census undercount (based on the 2018 Post-enumeration Survey)
- residents temporarily overseas on census night
- births, deaths, and net migration between census night and the date of the estimate
- reconciliation with demographic estimates at ages 0–9 years.

### Prices

In this profile, we present all GDP estimates in constant 2020 prices. GDP presented in constant prices is sometimes referred to as real GDP. By using constant prices we remove the distractionary effect of inflation. It enables us to meaningfully compare GDP from one year to the next.

### Productivity

Productivity measures the efficiency of production. In this profile, we measure productivity as GDP per filled job (ie the amount of economic activity generated on average by each filled job). Labour is only one input into production. The output of each employee may differ across industries in a region due to differing access to machinery, technology, and land. Therefore, productivity comparisons should only be made in circumstances where it is reasonable to assume that capital intensity will be broadly the same – for example, when looking at productivity within an industry over a limited-time period, or when comparing productivity of a particular industry with that same industry in another region.



### Self-employment

Self-employment rates are from Annual Linked Employer Employee Data (LEED).

### Tourism employment

Our estimates of tourism employment leverage off our tourism GDP estimates. We are able to use our understanding of the proportion of output in each industry in a territorial authority that is associated with tourism and apply this proportion to underlying employment levels in that industry. Summing up tourism employment by industry gives us an indication of the total number of jobs in a region that are attributable to the tourism industry.

### Tourism GDP

Our estimates of tourism GDP are measured in 2020 **prices** and make use of the Tourism Satellite Accounts (TSA) published by Statistics New Zealand, in conjunction with data on guest nights, visitor expenditure data from MBIE, and Infometrics' regional GDP model. The TSA estimates the contribution of the tourism industry to GDP nationally. For the years 2009-2013, we have apportioned tourism GDP from the TSA to each territorial authority (TA) using constrained shares of visitor expenditure from MBIE's visitor expenditure data.

For the years before 2009, we have calculated growth rates in each TA's tourism GDP, by adjusting TSA industry ratios (that summarise the proportion each industry's output associated with tourism) and applying these adjusted ratios to our estimates of the TA's GDP. Our adjustment takes into consideration each TA's relative exposures to industries and guest night shares compared to the national economy. The estimates for each TA are then benchmarked on the national total from the TSA.

### Unallocated

Unallocated items include taxes levied on the purchaser rather than the producing industry (such as GST, import duties, and taxes on capital transactions), and items that cannot easily be allocated to a specific industry (such as the seasonal adjustment balancing item). A seasonal adjustment balancing item is necessary to ensure that the sum of all seasonally adjusted industries can be reconciled with total GDP.

## ENTERPRISE DUNEDIN ACTIVITY REPORT - JUNE 2021 UPDATE

Department: Enterprise Dunedin

### EXECUTIVE SUMMARY

- 1 The purpose of this report is to update the Economic Development Committee on Enterprise Dunedin activities.

### RECOMMENDATIONS

That the Committee:

- a) **Notes** the Enterprise Dunedin Activity Report – June 2021 Update.

### DISCUSSION

- 2 Enterprise Dunedin activity is informed by the 2013-2023 Economic Development Strategy.
- 3 The strategy sets out two economic goals:
  - a) 10,000 extra jobs over 10 years (requiring growth of approximately 2% per annum); and
  - b) An average of 10,000 of extra income for each person (requiring GDP per capita to rise 2.5% per annum).

### Centre of Digital Excellence (CODE)

- 4 Work has continued across several workstreams. The CODE Project Team and Working Group has:
  - a) finalised legal constitutional and shareholding arrangements with CODE partners;
  - b) progressed negotiations with Kati Huirapa Rūnaka ki Puketeraki and negotiations with Te Rūnanga o Ōtākou regarding shareholding;
  - c) commenced the recruitment process for the DCC director and CODE Chair.
- 5 The second round of CODE grants closed on 3 May 2021 with 28 expressions of interest (EOI) for kickstart (development of prototypes), start-up (games and smaller studios) and scale up (encouraging larger studios) funding. The proposals are currently being developed into full request for proposals and assessed.
- 6 This builds on 56 EOIs received in the first round of funding, seven contracted projects and creation of five new studios in Dunedin.

- 7 Dunedin based Kiwi Paralympian Holly Robinson, was announced as a character in the JPGAMES Pegasus Dream Tour on 17 May. This opportunity was the culmination of work by Enterprise Dunedin, Ms Robinson and Mr Kawashima of JPGAMES as part of a memorandum of understanding signed with CODE in late 2019.
- 8 The Games for Health workstream continues to be developed. A workshop is planned with the CODE Working Group at the end of June to determine the initial scope. Considerations are likely to include the implications of the Health and Disability Review, choices regarding primary, secondary and tertiary health and alignment with the Ministry of Health's Health Technology Framework.

### **Otago Regional Economic Development (ORED) and Regional Strategic Partnership Fund**

- 9 ORED is a regional project partnership of economic development agencies across Otago that has been endorsed by the region's Mayors.
- 10 The ORED Working Group has engaged with the DCC's Manahautū General Manager Māori Corporate Services Group, who has guided ORED in developing a pathway to establish a partnership with Iwi.
- 11 A key focus is the ongoing development of relationships and partnerships with stakeholders and developing a set of draft priorities which can sit under the ORED Framework. This will be an opportunity to develop a more widely shared vision for the region's economic development and to review and adapt the Framework to reflect the current context.
- 12 This work continues to align with the Provincial Development Unit (PDU) and recently announced \$200m Regional Strategic Partnership Fund announced by Stuart Nash, Economic and Regional Development Minister on 27 May 2021.

### **Business Vitality**

#### *Business Clinics*

- 13 Enterprise Dunedin supports people seeking information such as compliance, financial planning and funding and refers people to relevant agencies and services.
- 14 32 people attended clinic sessions in the period between 1 July 2020 and 30 April 2021 on ideas including new food businesses, dog walking, tech services and shared workshop spaces, with six requesting follow up sessions.

### **Alliances for Innovation**

#### *Film*

- 15 Film Dunedin provided support on a range of services including crew introductions, business introductions, locations search, city services information, parking, and access to land and buildings.
- 16 Support was provided to the producers of 'The Royal Treatment' feature film. The project contracted Dunedin crew, actors and service providers and generated close to 4,500 bed nights in the period January to April 2021.
- 17 The crews working on 'The Royal Treatment' film and the television series 'One Lane Bridge' (Series 2) and 'Under the Vines' filmed in Otago during the first quarter of 2021 were 50% local



hires. Film Dunedin is working with Film Otago Southland and Film Queenstown Lakes to facilitate training for crew in areas where there are regional shortages. This includes sound, grips, camera locations and production accounting.

- 18 Film Dunedin continues to receive inquiries for a range of feature films and television projects considering Dunedin and Otago as their base. There are currently nine major projects in the inquiries pipeline regionally through to mid-2022.
- 19 In the 11 months to May 2021, Film Dunedin:
  - a) responded to 173 inquiries related to filming in the city, compared to 85 inquiries in the same period in 2020; and
  - b) issued 44 film permits compared with 43 permits in the corresponding period in 2020.

### **A Hub for Skills and Talent**

#### *JobDUN - Business Internship programme 2020/2021*

- 20 The objective of the JobDUN programme is to meet business needs, create high value jobs, retain skills and talent and contribute to the economic growth of Dunedin. The programme allocates funding for 50 intern placements on an annual basis.
- 21 The 2020/2021 season attracted 24 businesses applying for 44 interns, with over half from the ICT/Tech and Creative sectors. Notwithstanding the impact of COVID-19, this compares favourably with 28 businesses in the 2019/2020 season.
- 22 Enterprise Dunedin will analyse results with businesses and interns in June 2021 to report on satisfaction levels and job creation results. Early indications are that JobDUN has produced 20 roles, 11 of which are new roles (nine FTE, six PTE, five Contract) in 2020/2021. The 2021/2022 season will be launched in July 2021.

#### *Start Up Ecosystem*

- 23 The following highlights were achieved by Start Up Dunedin Trust (SUDT) during the period between January – March 2021:
  - a) 22 enquires from new founders (including incubation screening and support) bringing the year to date total to 184;
  - b) delivery of three cohorts of “Audacious” during the period (two in person and one online) with 85 new ventures accepted into the programme;
  - c) events included sessions with Cognito, Young Enterprise, Pacific Students support and inclusive entrepreneurial support organisation Hui;
  - d) Five applications were received for Distiller incubation, bringing the year to date total to 19;
  - e) work has continued with investors including Icehouse and Blackbird Ventures.
- 24 The local premier of *Outside the Valley* was held on 6 June 2021 at the Rialto Cinema. The film which documented start up activity outside Silicon Valley included communities in Mexico, Uruguay, Portugal and New Zealand with a particular focus on Dunedin as an entrepreneurial

destination. The session was attended by nearly 200 people and showcased Pōtiki Poi, Cloud Cannon and Heidi Renata from Innov8HQ.

## **Linkages Across Borders**

### *Project China*

- 25 Project China received a runner up award in the Best Project (Corporate or Commercial Focused) category at the Sister Cities New Zealand's Annual Conference on 15 April.
- 26 The following activities were undertaken during the period:
  - a) supporting the coordination of the New Zealand-China Non-Communicable Diseases Research Collaboration Centre (NCD CRCC) forum in March 2021.
  - b) Zoom were held conferences with:
    - the Qingyuan Foreign Affairs Office to discuss current economic and social conditions and develop a work plan for future cooperation in education, trade and high-tech areas in April 2021;
    - the Shanghai Foreign Affairs Office on proposed activities over the next 12 months in May 2021.
  - c) preparation continues the planned renewal of memorandums of understanding with Shanghai Yu Garden, Shanghai Public Library and the Shanghai Science & Technology Commission in the area of non-communicable disease research.
  - d) planning has commenced on the development of an International Strategic Framework (commencing with Project China) to further enable economic, social opportunities and city strengths with sister cities and other cities.

## **Compelling Destination**

### *Destination Marketing*

- 27 Dunedin's visitor sector continues to be affected by COVID-19 travel restrictions. Across New Zealand there has been a distinct shift by domestic travellers away from urban centres. The opening of both Trans-Tasman and Cook Islands will have further impact on domestic visitation.
- 28 Enterprise Dunedin's marketing activity continues to adjust depending on COVID-19 alert levels and border restrictions. Planning and subsequent implementation is underway for a refreshed domestic campaign focusing on school holidays and events.
- 29 Investment in marketing opportunities in Australia are well advanced both directly and in conjunction with Tourism New Zealand.

### *Strategic Tourism Assets Protection Programme (STAPP v1)*

- 30 Destination Management (DM) brings together difference stakeholders to achieve the common goal of developing a well-managed and sustainable visitor destination. A Destination Management Plan (DMP) is the outcome of this initiative and is being funded by STAPP.

- 31 In February 2021, Enterprise Dunedin commissioned Stafford Strategy to write a new Destination Plan, in accordance with the Ministry of Business, Innovation and Employment's (MBIE) guidelines.
- 32 Stafford Strategy are currently developing the new Destination Plan. To date face to face engagement has included mana whenua, key stakeholders, partners, tourism operators and Community Boards, with 35 written submissions received. A review of the feedback including the workshop findings is underway.
- 33 During COVID-19 a Central Government Industry taskforce launched an initial draft of the future of tourism in Aotearoa. This proposed an enhance role for entities such as ED in Destination Management. The taskforce recommended DMPs be integrated into local planning processes and aligned with national visitor planning frameworks. The Tourism Minister is now seeking to develop new outcomes through a government partnership with tourism businesses, members of the taskforce, iwi, researchers and independent advisors.
- 34 The new outcomes will be delivered through a Tourism Industry Transformation Plan (ITP). The IPT will build on recent work by the Parliamentary Commissioner for the Environment, Tourism Future Taskforce and the Climate Change Commission to transform tourism to a more sustainable model.
- 35 It is anticipated that Dunedin's new Destination Plan will be completed by November 2021. This date may change if work currently undertaken on the ITP signals changes that may affect the management of Dunedin as a destination.

*Strategic Tourism Assets Protection Programme (STAPP v2)*

- 36 In May 2021 the Tourism Minister announced a \$200m fund investment entitled Tourism Communities. The package focuses on Support, Recovery and Re-set and seeks to provide immediate funding support. Applications are open to Regional Tourism Offices (RTOs) and close on 20 June 2021.
- 37 \$26m has been allocated to RTOs to manage, plan, promote, and market tourism activities in their regions. Enterprise Dunedin expects to receive \$1.0m subject to agreement on planned activity.
- 38 Overall, this investment will support RTOs to implement destination management and planning and be used to encourage more people to explore their regions. The funding aims to support the broader tourism sector, stimulate regional demand, increase industry capability, and progress the goals of the New Zealand-Aotearoa Government Tourism Strategy.
- 39 The investment plans that RTOs will be required to develop sit across three streams as per STAPP; Product Development and Capability, Destination Management and Destination Marketing.

*Visit Sector Initiatives and Engagement*

- 40 Enterprise Dunedin continues to invest in marketing the Central Otago Touring Route from Dunedin to Queenstown. Work with other RTO partners in marketing the Southern Scenic Route (SSR), reviewing current branding and positioning of the SSR. Investment in these opportunities is likely to increase in line with Touring Route initiatives with Tourism New Zealand (TNZ), particularly in the Australian market.

- 41 Enterprise Dunedin is coordinating the region's MBIE's Regional Events Fund. The fund is for new or existing events, or capability building and is available to June 2023. It is designed to replace lost international visitor spend and boost regional domestic spend. The latest round distributed \$110,000 to two events. Two more rounds occur in 2021 and 2022.

*Research and Data*

- 42 The new Accommodation Data Programme commenced in July 2020. Dunedin's occupancy rate for March 2021 was 56.4% (New Zealand's was 41.3%). Average nights stayed per guest remains consistent with February at 1.9 nights.
- 43 The Ministry of Business, Employment and Innovation (MBIE) has replaced the Monthly Regional Tourism Estimates (MRTE) to measure tourism spend at an RTO level, with Tourism Electronic Card Transactions (TECTs). The TECTs aims to present the measured electronic card transactions (ECT) attributable to tourism but without any attempt to represent the total spend. The TECTs are based almost exclusively on physical electronic card transactions, and do not include any other form of spending such as cash, pre-purchases or online spend. This results in the figures in the TECTs being substantially smaller than those in the MRTEs so the two series should not be directly compared and limitations of the TECT figures needs to be acknowledged.
- 44 A comparison of the last three months visitor spend for Dunedin is shown below:

| <b>TECT Spend<br/>Month end</b> | <b>Domestic<br/>2020</b> | <b>Domestic<br/>2021</b> | <b>International<br/>2020</b> | <b>International<br/>2021</b> |
|---------------------------------|--------------------------|--------------------------|-------------------------------|-------------------------------|
| January                         | \$28m                    | \$28m                    | \$11m                         | \$2m                          |
| February                        | \$34m                    | \$31m                    | \$10m                         | \$3m                          |
| March                           | \$28m                    | \$33m                    | \$6m                          | \$3m                          |

- 45 For the year ending March 2021 domestic visitor spend in Dunedin fell 15% compared to March 2020; the national average was down 17% for the period.

- 46 Social and website engagement results for January to May 2021 are:

- DunedinNZ.com remains high with 33% increase in the number of website visitors and a 24% increase in the number of pages per session compared to the previous reporting period;
  - the DunedinNZ Instagram account had 815,481 impressions with 41,994 interactions and 43,600 followers (a user who follows your account and can see, like and comment on any photo you post). The DunedinNZ Instagram account has an engagement rate of 5% (quantitative measure of how users interact with the content), which compared to other Regional Tourism Organisations (RTOs) is the highest in New Zealand;
  - the DunedinNZ Facebook page has had 2,483,883 impressions with followers totalling 91,190. The engagement rate totals 5.8% with 7,981 clicks on post links.
- 47 The Destination Marketing research portfolio is complete for the year, with work including microsegments, residents' sentiment around tourism, visitor perceptions and visitor expectations (with University of Otago). These sit alongside new data sources and will continue to inform Enterprise Dunedin's marketing direction.

*Business Events (Conferences)*

- 48 Dunedin Business Events has extended the contract for Tourism Marketing Solutions to generate new conference leads and this is funded by MBIEs STAPP fund. Four leads have been generated with Enterprise Dunedin submitting one bid for March 2022, which was unsuccessful.
- 49 Enquiries for new business events has increased with 14 new leads to date compared to nine in the same quarter of 2020.
- 50 Enterprise Dunedin is fielding enquiries for International Conferences and is currently working on two International Bids; one with the University of Otago and one with the Otago Polytechnic Design School.

*Consumer Marketing – New Zealand and Australia*

- 51 The “Event-full Autumn” domestic campaign was launched in March. Events have been identified by Tourism New Zealand as a key driver of domestic tourism outside of the traditional school holiday periods. Marketing collateral has featured in NZME Digital, NZ Geographic, Stuff Digital, Viva Magazine, TVNZ OnDemand, NZME Travel Inserts and North & South. The aim is to encourage external visitation to attend events and to stay longer and enjoy extra activities.
- 52 In partnership with Dunedin Airport and OUSA, Enterprise Dunedin facilitated a ‘Dunedin Takeover’ at the Auckland Craft Beer & Food Festival in March. The aim was to create awareness of Dunedin as a visit destination and showcase a major Dunedin event (Dunedin Craft Beer & Food Festival). Overall, the event achieved the key objectives of raising awareness of Dunedin, enhancing travel opportunities to Dunedin and working with other Dunedin business partners.
- 53 Enterprise Dunedin currently supports the Otago Nuggets with the Dunedin brand on court signage and the team warmup strip. This brand placement seeks to drive awareness of Dunedin as a destination to national and international audiences through widespread television coverage. As part of the agreement players are contracted to promote Dunedin through their social channels.
- 54 The “Anything But” domestic winter campaign was launched in May. This campaign is pitching Dunedin as a place to visit in winter and challenge the negative perceptions of Dunedin head-on. The initial launch in May features a mix of events aligned with key marketing pillars and will be featured across multiple channels e.g. NZME Digital, Stuff Winter Insert, Southland Times, Herald Winter Insert, Viva Gloss, Kia Ora Magazine, Fashion Quarterly, North & South.
- 55 In collaboration with University of Otago, Enterprise Dunedin attended Tertiary Open Day to market the city for future students and parents. Prior to the event, digital channels were used to push extending stay and to facilitate visiting attractions beyond the tertiary precinct. Data Ventures reported 10,260 domestic visitors in the city on Sunday 23 May, well above the ongoing monthly average of 6,300.
- 56 Enterprise Dunedin continues to use ‘Plan D’ as the creative direction to market Dunedin and launched a continuation of that campaign in Australia. The campaign reflects the domestic success with Tourism Sentiment Index (TSI) reporting “On a global average of 20,000 destinations analysed in the TSI database. Dunedin finished in the top 30% of global TSI scores around the world.
- 57 Enterprise Dunedin is working closely with Tourism New Zealand on joint venture domestic campaign activity. Dunedin received the highest engagement on social platforms during

February's Urban Leisure Travel campaign. In April, TNZ launched the "Active Recharge" campaign featuring two Dunedin operators.

*PR and Promotions*

- 58 Enterprise Dunedin has secured 36 dedicated features or inclusions in regional, national and international publications. Featured stories were a mix of travel, lifestyle, business and city sector profiles including education and the start-up ecosystem.
- 59 Enterprise Dunedin's broader activities and commentary from June 2020 to April 2021 have included 215 news articles nationally.
- 60 Coverage published over this period included a variety of media channels including Guardian Australia, National Geographic UK, Spinoff, the Young Adventuress, Cuisine and major New Zealand media outlets Stuff and NZME.

*Trade Marketing*

- 61 Enterprise Dunedin initiated the inaugural national domestic campaign with Flight Centre, Travel Associates and Travel Manager. The campaign featured three tourism operators and accommodation providers in Dunedin packages.
- 62 With commencement of trans-Tasman travel, Enterprise Dunedin has been working closely with TNZ to support the promotion of Dunedin to Australian Travel Trade. The Australian Travel Trade have specifically requested regional content, with TNZ filming in Dunedin as part of a regional series.
- 63 Enterprise Dunedin attended TRENZ in April in Christchurch with 15 Dunedin operators. This event had over 700 tourism attendees. Enterprise Dunedin and local operators participated in the workshops which will shape the future Tourism Strategy for New Zealand.

*i-SITE Visitor Centre*

- 64 As a result of COVID-19, the mix of visitors to the i-SITE Visitor Centre has changed significantly. International travellers who were in the country pre COVID-19 have been continuing with their working holidays as planned.
- 65 The table below demonstrates the sales by domestic, international and cruise visitors at the Visitor Centre, from 1 July 2020 to 30 April 2021 compared to same period last year.

|                          | 1 July 2019 – 30 April 2020 | 1 July 2020 – 30 April 2021 |
|--------------------------|-----------------------------|-----------------------------|
| Domestic Travellers      | 24%                         | 92%                         |
| International Travellers | 47%                         | 8%                          |
| Cruise Ship Travellers   | 28%                         | 0%                          |
| <b>Total</b>             | <b>100%</b>                 | <b>100%</b>                 |

- 66 This table demonstrates the split of domestic visitors to the Dunedin visitor centre by region for 1 July 2020 to 30 April 2021 compared to the same period last year.

|                   | 1 July 2019 – 30 April 2020 | 1 July 2020 – 30 April 2021 |
|-------------------|-----------------------------|-----------------------------|
| Northland         | 1.6%                        | 2.6%                        |
| Auckland          | 9.9%                        | 16.4%                       |
| Waikato           | 1.4%                        | 2.9%                        |
| Bay of Plenty     | 3.5%                        | 5.5%                        |
| Gisborne          | 0.1%                        | 0.3%                        |
| Hawkes Bay        | 0.6%                        | 1.5%                        |
| Taranaki          | 0.4%                        | 0.8%                        |
| Manawatu-Wanganui | 1.2%                        | 1.0%                        |
| Wellington        | 4.2%                        | 7.3%                        |
| Marlborough       | 1.1%                        | 1.3%                        |
| Canterbury        | 6.8%                        | 5.3%                        |
| Dunedin           | 62.8%                       | 51.5%                       |
| Otago             | 4.2%                        | 2.2%                        |
| Southland         | 2.2%                        | 1.4%                        |
| <b>Total</b>      | <b>100%</b>                 | <b>100%</b>                 |

## NEXT STEPS

67 Enterprise Dunedin activity will be incorporated into future reports.

## Signatories

|             |  |
|-------------|--|
| Author:     | Malcolm Anderson - City Marketing Manager<br>Fraser Liggett - Economic Development Programme Manager |
| Authoriser: | John Christie - Manager Enterprise Dunedin   |

## Attachments

There are no attachments for this report.

**SUMMARY OF CONSIDERATIONS**
***Fit with purpose of Local Government***

This report promotes the economic well-being of communities in the present and for the future.

***Fit with strategic framework***

|   | Contributes                         | Detracts                 | Not applicable                      |
|---|-------------------------------------|--------------------------|-------------------------------------|
| Social Wellbeing Strategy               | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>            |
| Economic Development Strategy           | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>            |
| Environment Strategy                    | <input type="checkbox"/>            | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| Arts and Culture Strategy               | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>            |
| 3 Waters Strategy                       | <input type="checkbox"/>            | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| Spatial Plan                            | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>            |
| Integrated Transport Strategy           | <input type="checkbox"/>            | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| Parks and Recreation Strategy           | <input type="checkbox"/>            | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| Other strategic projects/policies/plans | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>            |

Enterprise Dunedin is responsible for the delivery of the 2013-2023 Economic Development Strategy.

***Māori Impact Statement***

The CODE Working Group is working with Te Rūnanga o Ōtākou and Kati Huirapa Rūnaka ki Puketeraki regarding the development of Kaupapa CODE. Further engagement with Rūnaka is planned during the development of the OREDP.

Enterprise Dunedin continues to work with Aukaha around the rewrite of the Destination Plan and the cultural audit component of our marketing activity.

***Sustainability***

There are no known impacts for sustainability.

***LTP/Annual Plan / Financial Strategy /Infrastructure Strategy***

Enterprise Dunedin activities and the 2013-2023 Economic Development Strategy are included in the 2018-28 10-year plan.

***Financial considerations***

There are no financial considerations.

***Significance***

This decision is considered low significance in terms of the Significance Engagement Policy.

***Engagement – external***

External engagement has been held as relevant across Enterprise Dunedin's portfolio, including Te Rūnanga o Ōtākou and Kāti Huirapa Rūnaka ki Puketeraki, Dunedin's Tech sector, Education, Tourism, Film, Food, Cruise and general business sectors. The has included consultation, online workshops, meetings and surveys, newsletters and general updates via Enterprise Dunedin's CRM and face to face to meetings.

***Engagement – internal***

As an update report, no internal engagement has been undertaken.



**SUMMARY OF CONSIDERATIONS**

***Risks: Legal / Health and Safety etc.***

There are no identified risks.

***Conflict of Interest***

There are no known conflicts of interest.

***Community Boards***

Community Boards will be involved with ongoing discussions around the new Dunedin Destination Plan.

## **STUDY DUNEDIN UPDATE**

Department: Enterprise Dunedin

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### **EXECUTIVE SUMMARY**

- 1 The purpose of this report is to update the Economic Development Committee (EDC) on recent activity undertaken by Study Dunedin, a key initiative in the 2013-2023 Economic Development Strategy (the Strategy). Study Dunedin supports international education in partnership with tertiary institutions, high schools, English language centres and the Otago Chamber of Commerce.
- 2 Education remains one of Dunedin's key industries and economic drivers. Study Dunedin has continued to advocate and support the sector during a period of significant uncertainty arising from border restrictions in the international education market.

### **RECOMMENDATIONS**

That the Committee:

- a) **Notes** the Study Dunedin update report.

### **BACKGROUND**

- 3 Education is a significant industry in the city. The latest reports produced by the University of Otago and Otago Polytechnic indicate the tertiary sector contributed over \$1.5b to the Dunedin economy. In addition to economic benefits the tertiary sector also enables a range of other outcomes including:
  - a) Influence through nationwide campuses;
  - b) Research outputs;
  - c) Relationships with business and institutions nationally and internationally.
- 4 Dunedin's 12 high schools produce high quality National Certificate of Educational Achievement (NCEA) results each year and provide a wide range of quality subject options.
- 5 International education is a valuable part of the wider education ecosystem. As well as providing economic value, international students provide social and cultural benefits to the city. Until the impact of COVID-19 and border restrictions international education:
  - a) Resulted in 5,000 international students studying in Dunedin each year;
  - b) Contributed approximately \$200m in economic value to Dunedin;

- c) Supported over 2,200 jobs.
- 6 Study Dunedin was formed in 2013 to attract and facilitate greater numbers of international students to live and study in the city. Study Dunedin works with the Study Dunedin Advisory Group (SDAG). This partnership includes the University of Otago, Otago Polytechnic, Otago Chamber of Commerce, and Dunedin high schools who enable activities including:
  - a) Destination marketing to promote Dunedin as a destination to study and live;
  - b) A positive student experience ensuring students feel valued and that their time in Dunedin is safe, inclusive and they are recognised as part of the community;
  - c) Capacity and capability building including data gathering to ensure sound decision-making and provision of training and development to the sector;
  - d) Education and workforce pathway building. Activities are focussed on transitions between education sectors and developing programmes to support students into employment in Dunedin, and New Zealand, particularly in areas where skill shortages exist.

## **DISCUSSION**

### ***Sector Update***

- 7 New Zealand's borders continue to be closed to almost all international students. Current predictions indicate that up to 90% of international students will have departed New Zealand by the end of 2021, leaving approximately 16,000 studying onshore.
- 8 Starting this year, Government has allowed 1,250 tertiary undergraduate and post-graduate students entry into New Zealand under strict exemption conditions and through managed isolation. Currently under half of those places have been activated, and so arrangements have been made for 400 places to be available for Chinese undergraduate students to fly in June from Shanghai to Auckland to begin second semester studies at all eight universities.
- 9 The Ministry of Education has been working on a Strategic Recovery Plan for International Education with peak bodies, industry groups and stakeholders. Together the regions have been collaborating with the Ministry of Education/Education New Zealand (ENZ) to ensure a regional perspective is included in the process and the final plan.

### ***Supporting the Dunedin international education market***

- 10 Study Dunedin has continued to support tertiaries and high schools over the last 12 months. Key work streams have focussed on student well-being, advocacy and supporting institutions as uncertainty remains. Activities to support student well-being have included:
  - a) An End of Year Celebration in December 2020 at Logan Park which was attended by the Deputy Mayor. This was an opportunity for all international students across the sector to come together over food and activities;
  - b) An Amazing Race event run in partnership with Sport Otago for high school students in March 2021. The objective was to welcome international students back for the academic year;

- c) An I-Hub café run on a monthly basis where students can spend time together, doing activities and events that they have chosen. The first event was undertaken on Thursday 20 May 2021 at the Dunedin Public Library.
- 11 Study Dunedin has continued to support institutions and partners (particularly education agents) through:
- a) Quarterly gatherings where high schools, English language schools, the University and Polytechnic can come together to share information and support;
  - b) Attending monthly meetings with International Directors from Dunedin high schools to share information and provide support;
  - c) Planning and implementing an Auckland Education Agent Famil programme in March 2021. This was a follow-on from the Auckland Agent Event Study Dunedin in November 2020. Nine international education agents spent three days visiting high schools and tertiary institutions.

A survey was completed by 75% of participants with 100% agreeing their experience was what they expected. Agents were also asked how they would describe Dunedin to students and parents. A sample response noted:

*“Otago is one of the top recommendations I make to students and their parents for high school and tertiary study. I was extremely impressed with the high schools and the academic results they get from their students - they far exceed that of Auckland schools in particular. The pastoral care they are giving their students also exceeds expectations. This wrap around support is also evident in both Otago Poly and Uni and the close proximity to the city and student accommodation is very appealing.”*

- d) Collaborating with the University of Otago International Office to support their Tertiary Open Day programme. Study Dunedin supplied a ‘Welcome to Dunedin’ gift bag to 28 international students flown to the city for the day by the International Office.
- 12 Study Dunedin is working with Education NZ to secure funding for a future focussed project aligned to work already underway in the city. The project (focussed on transitions and social licence/student stories) would span the next three financial years with the first year testing the hypothesis and a proof of concept. Study Dunedin should learn the outcome of the application later in June.

## **OPTIONS**

As this is an update report, there are no options.

## **NEXT STEPS**

- 13 Study Dunedin will report on ongoing activities and the outcome of the ENZ funding application as part of the EDC forward work programme.

**Signatories**

|             |   |
|-------------|---|
| Author:     | Margo Reid - Study Dunedin Co-ordinator<br>Dougal McGowan - Economic Development Project Manager      |
| Authoriser: | Fraser Liggett - Economic Development Programme Manager<br>John Christie - Manager Enterprise Dunedin |

**Attachments**

There are no attachments for this report.

**SUMMARY OF CONSIDERATIONS**
***Fit with purpose of Local Government***

This report promotes the economic well-being of communities in the present and for the future.

***Fit with strategic framework***

|   | Contributes                         | Detracts                 | Not applicable                      |
|---|-------------------------------------|--------------------------|-------------------------------------|
| Social Wellbeing Strategy               | <input type="checkbox"/>            | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| Economic Development Strategy           | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>            |
| Environment Strategy                    | <input type="checkbox"/>            | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| Arts and Culture Strategy               | <input type="checkbox"/>            | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| 3 Waters Strategy                       | <input type="checkbox"/>            | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| Spatial Plan                            | <input type="checkbox"/>            | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| Integrated Transport Strategy           | <input type="checkbox"/>            | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| Parks and Recreation Strategy           | <input type="checkbox"/>            | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| Other strategic projects/policies/plans | <input type="checkbox"/>            | <input type="checkbox"/> | <input checked="" type="checkbox"/> |

***Māori Impact Statement***

There are no known impacts for tangata whenua.

***Sustainability***

There are no known impacts for sustainability.

***LTP/Annual Plan / Financial Strategy /Infrastructure Strategy***

Study Dunedin activities and the 2013-2023 Economic Development Strategy framework are included in the 2018-28 Long Term Plan.

***Financial considerations***

There are no financial considerations.

***Significance***

This decision is considered low significance under the Significance Engagement Policy.

***Engagement – external***

As an update report, no external engagement has been undertaken.

***Engagement - internal***

As an update report, no internal engagement has been undertaken.

***Risks: Legal / Health and Safety etc.***

There are no identified risks.

***Conflict of Interest***

There are no known conflicts of interest.

***Community Boards***

There are no known implications for Community Boards.

## **STRATEGIC TOURISM ASSETS PROTECTION PROGRAMME JUNE 2021 UPDATE**

Department: Enterprise Dunedin

### **EXECUTIVE SUMMARY**

- 1 The purpose of this report is to update the Economic Development Committee on the implementation of the Government funded Strategic Tourism Assets Protection Programme (STAPP).
- 2 The aim of STAPP is to support tourism businesses and Regional Tourism Organisations dealing with the economic impact of COVID-19.
- 3 Enterprise Dunedin received \$700k to implement 15 STAPP projects between November 2020 and March 2022.

### **RECOMMENDATIONS**

That the Committee:

- a) **Notes** the Strategic Tourism Assets Protection Programme update report.

### **BACKGROUND**

- 4 In August 2020 Government allocated \$20.2 million to the 31 Regional Tourism Organisations (RTOs) across New Zealand.
- 5 The investment supports RTOs to implement destination marketing initiatives that encourage more people to explore their regions. The funding also allows RTO's to support the broader tourism industry, stimulate regional demand, increase industry capability and progress the goals of the New Zealand-Aotearoa Government Tourism Strategy.
- 6 Enterprise Dunedin (ED) has received \$700k to implement 15 individual projects between November 2020 and March 2022.

### **DISCUSSION**

- 7 A brief overview of the status of the fifteen STAPP projects underway with contractors and ED staff is summarised below.

#### **Rewrite of the Dunedin Destination Plan**

- 8 The first round of face to face consultation on the new Dunedin Destination Plan by Stafford Strategy has been completed and online submissions are now closed.

- 9 The next step is for the consultants to deliver a draft which will outline issues and opportunities for managing and marketing Dunedin as a destination. Another round of consultation on this draft is planned.
- 10 It is likely that the new Dunedin Destination Plan will be complete by November. The final date is dependent on the implementation of national initiatives discussed in the Activity Report.

#### **Destination Marketing**

- 11 Programmes to enhance domestic destination marketing have been implemented by Enterprise Dunedin staff and a consultant. The activity is aligned with partners including Tourism New Zealand (TNZ).
- 12 Planning has taken place to implement these marketing initiatives by March 2022. Analysing opportunities for the use of agencies to deliver some marketing initiatives, in both domestic and international spheres, has also occurred.

#### **Business Events**

- 13 Consultants Tourism Marketing Solutions (TMS) has been contracted to connect with at least 100 qualified 'conference buyers' a month to establish interest in holding a Business Event in Dunedin.
- 14 TMS has secured leads for business and increased interest in Dunedin.
- 15 This project's completion date is 30 June 2021.

#### **Marketing Cultural Audit**

- 16 Aukaha has been contracted to review and advise on the appropriateness of marketing Ōtepoti Dunedin, from a Te tiriti o Waitangi and mana whenua cultural perspective.
- 17 This project started in April 2021 and is due for completion in September 2021.

#### **Digital Assets/ New Image and Video assets**

- 18 A contractor was appointed in November 2020 to grow DunedinNZ's digital assets and streamline the management of these assets to enable enhanced access by the public.
- 19 Objectives include increasing the number of downloads and completing a set of imagery and video assets across all four seasons.
- 20 This project is due for completion by the end of October 2021.

#### **Data Sharing**

- 21 This project aims to collect and share data across Dunedin activities and attractions with the objective of standardising visitor data. This would be captured on a monthly basis, aggregated, summarised and shared back to industry.
- 22 This project will commence in July 2021.



**Product Review**

- 23 Information around current tourism product by; type, price range, target market (where operators have this available) and by whom, has been gathered through an online portal, and manually through the i-SITE Visitor Centre.
- 24 This data is currently being analysed to determine gaps in the offering and potential opportunities related to the Dunedin brand. Workshops to investigate subsequent opportunities are scheduled over the next few months.
- 25 This project commenced in November 2020 and is due for completion by October 2021.

**Crisis Resilience**

- 26 Resilient Organisations has been contracted to assist tourism operators create or update their existing Crisis Resilience Plans. Operators were invited to complete a confidential online survey to assess their current Resilience Plan. These plans were then reviewed by the consultants who produced individual resilience reports, including recommendations for improvement.
- 27 Following this, participants were invited and encouraged to join three online workshops focusing on:
  - Planning for an uncertain future;
  - Being ready for anything;
  - Business continuity planning.
- 28 In May 2021 workshops were held to support the development or upgrade existing Crisis Resilience Plans.
- 29 This project is now complete.

**Pathways to Carbon Neutrality**

- 30 The first stage of this project was a webinar for tourism operators with consultants EKOS and Coffey, who outlined the importance of; measurement, reduction, offsetting carbon, and how to use an online measurement tool.
- 31 In June, EKOS and Coffey will present and encourage tourism operators to utilise the carbon measurement tool and work towards carbon neutrality. A further workshop will initiate conversations about how visitors to Dunedin can contribute to the City achieving carbon neutrality by 2030.
- 32 This project is due for completion 30 June 2021.

**Digital Marketing**

- 33 Enterprise Dunedin originally planned to run digital marketing programmes for operators with its partner Maverick. Additional Government funding for Qualmark to run a similar programme led to Enterprise Dunedin withdrawing from the initiative. MBIE subsequently approved funding reallocation to the Digital Support project.

34 Enterprise Dunedin staff have supported Qualmark in facilitating the Digital Marketing workshops.

35 This project has been completed by Qualmark.

# **1 Signature Event/s Promotion**

36 This funding is for supporting the marketing of events aligned to the Regional Event Funding Programme.

37 Completion will be dependent on the event timings between 2021 and June 2022.

## **45 South**

38 A Memorandum of Understanding (MOU) was signed in March 2021 with Great South and the eight participating regions in the proposed 45 South NZ touring route (Lake Wanaka Tourism, Destination Queenstown, Destination Fiordland, Great South, Tourism Waitaki, Tourism Central Otago, Enterprise Dunedin and Clutha Development). Each RTO has contributed \$25k from their STAPP funding with mutual agreement on how these funds will be spent including:

- Employment of a Touring Route Development Advisor employed by Great South;
- Data and visitor insights;
- Development of the project's business plan.

39 The long-term objectives of this project are to;

- Grow visitor awareness and knowledge of this combined region and how to explore it;
- Grow length of stay and spend in the region;
- Encourage repeat visitation (especially domestic and Australia);
- Encourage sustainable and effective recovery of our people and places post COVID-19.

40 This first stage is due for completion 30 November 2021.

## **Otago Cycle Trail Collective**

41 In August 2020 a MOU was signed with Tourism Central Otago, Enterprise Dunedin, Clutha Development, Central Otago Queenstown Network Trust, Central Otago Clutha Trails Company and Otago Central Trail Operators Group to form a partnership to promote the regions trail experiences. A Trails Marketing role to promote the regions trail experiences has been established under the management of Tourism Central Otago.

42 The objectives are to;

- Promote interregional travel between Dunedin, Central Otago, Clutha and other gateways;
- Promote the ability to have a 'low impact, low carbon' holiday on a bike in Otago;
- Enable efficient and effective use of various channels and media that reach key local and visitor markets and supports marketing from operators and the wider tourism industry.

43 This project is due for completion July 2021.

### Community Sentiment

- 44 Contractor Angus & Associates completed a survey of Dunedin resident's sentiment regarding tourism.
- 45 This survey measured resident's sentiment around support for tourism, extent of pressures on the community, and both the benefits and negative impacts of tourism on the community.
- 46 The results of this survey have been shared with the consultants rewriting the Dunedin Destination Plan.
- 47 This project is now complete, although consideration is being given to continuing to understand long term trends.

### Digital Support

- 48 This project's key aims include providing additional support to assist the digital marketing of Dunedin in generating increased awareness and conversion across the range of digital platforms that Enterprise Dunedin uses. The project is also focused on enhancing our digital reporting processes.
- 49 This project is due for completion 24 December 2021.

### OPTIONS

- 50 As this is a report for noting, there are no options.

### NEXT STEPS

- 51 Staff will continue to implement and oversee the implementation of STAPP projects and report outcomes to MBIE.
- 52 This project will be added to Enterprise Dunedin forward work programme and further reports will be presented to committee.

### Signatories

|             |   |
|-------------|---|
| Author:     | Malcolm Anderson - City Marketing Manager<br>Louise van de Vliet - Manager Visitor Centre |
| Authoriser: | John Christie - Manager Enterprise Dunedin  |

### Attachments

There are no attachments for this report.

**SUMMARY OF CONSIDERATIONS**
***Fit with purpose of Local Government***

This decision promotes the economic, social, environmental, arts and culture well-being of communities in the present and for the future.

***Fit with strategic framework***

|   | Contributes                         | Detracts                 | Not applicable                      |
|---|-------------------------------------|--------------------------|-------------------------------------|
| Social Wellbeing Strategy               | X                                   | <input type="checkbox"/> | <input type="checkbox"/>            |
| Economic Development Strategy           | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>            |
| Environment Strategy                    | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>            |
| Arts and Culture Strategy               | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>            |
| 3 Waters Strategy                       | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| Spatial Plan                            | <input type="checkbox"/>            | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| Integrated Transport Strategy           | <input type="checkbox"/>            | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| Parks and Recreation Strategy           | <input type="checkbox"/>            | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| Other strategic projects/policies/plans | <input type="checkbox"/>            | <input type="checkbox"/> | <input checked="" type="checkbox"/> |

***Māori Impact Statement***

Aukaha are contributing on behalf of mana whenua to the rewrite of the Destination Plan and the cultural audit marketing component of the programme.

***Sustainability***

The outcome of the Carbon Neutrality project will enable operators to measure their carbon footprint and plan to reduce and mitigate any impact in a sustainable way.

***LTP/Annual Plan / Financial Strategy /Infrastructure Strategy***

There are no implications.

***Financial considerations***

The STAPP programme is funded \$700k by Government.

***Significance***

This is considered low in terms of the Council's Significance and Engagement Policy.

***Engagement – external***

There has been ongoing external engagement with a wide range of stakeholders over the multiple projects.

***Engagement - internal***

Engagement has been across a range of Council departments including Parks and Recreation and Community Development.

**SUMMARY OF CONSIDERATIONS**

***Risks: Legal / Health and Safety etc.***

There are no known risks.

***Conflict of Interest***

There are no known conflicts of interest.

***Community Boards***

All Community Boards have been engaged with DDP and an overview of STAPP.

## **PLAN D MARKETING CAMPAIGN JUNE 2020 - APRIL 2021**

Department: Enterprise Dunedin

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### **EXECUTIVE SUMMARY**

- 1 The purpose of this report is to update the Economic Development Committee (EDC) on Enterprise Dunedin's marketing campaign, 'Dunedin a pretty good Plan D'.
- 2 This campaign was Enterprise Dunedin's marketing response to the impact of COVID-19 on Dunedin's tourism sector.
- 3 The campaign was launched in May 2020, as other Regional Tourism Organisations (RTO's) were also launching their domestic campaigns.
- 4 New marketing collateral continues to be released as part of the ongoing campaign.
- 5 The campaign achieved its two key objectives to;
  - i) Motivate and encourage New Zealanders to visit Dunedin;
  - ii) Create awareness and change perceptions of what Dunedin has to offer visitors as a destination - demonstrating that Dunedin attractions and activities are comparable with 'bucket list' destinations overseas.

### **RECOMMENDATIONS**

That the Committee:

- a) **Notes** the Marketing Campaign June 2020– April 2021 report.

### **BACKGROUND**

- 6 Prior to COVID-19 (March 2019) the tourism sector in Dunedin represented:
  - 6.3% of Gross Domestic Product;
  - 9% of employment (tourism activities and attractions);
  - \$781m total spend (domestic and international);
  - key spend categories included; food and beverage, passenger transport, accommodation and other tourism product (activities and attractions);
  - key international markets included; Australia, United States of America, China, Europe and the United Kingdom;

- approximately 150 local tourism operators.
- 7 The concept behind the “Plan D” campaign was created in December 2019, with brand partner BrandAid. Originally designed as a national and Australian (eastern seaboard) marketing initiative, COVID-19 forced an initial change in the campaign to a purely domestic and local focus.
  - 8 “Plan D” was shared with potential sector partners in March 2020 including; Larnach Castle, Royal Albatross Colony, Dunedin Railways, Dunedin International Airport, Karitane Maori Tours and Dunedin Host, all of whom indicated they were supportive of the campaign.
  - 9 Feedback from local tourism operators including Larnach Castle, Horizon Tours, Speight’s Brewery, Royal Albatross Colony, and Olveston House reported positive sales as a result of the campaign. Customers noted the campaign’s role in inspiring their trip to Dunedin.

## DISCUSSION

- 10 The key objectives of the campaign were to:
  - i) Motivate and encourage New Zealanders to visit Dunedin;
  - ii) Create awareness and change perceptions of what Dunedin has to offer visitors as a destination - demonstrating that Dunedin attractions and activities are comparable with ‘bucket list’ destinations overseas.
- 11 Throughout the campaign Enterprise Dunedin has partnered with Tourism New Zealand (TNZ) and their domestic campaign ‘Do Something New, New Zealand’.
- 12 Other partners such as Dunedin International Airport (DIAL) Have used “Plan D” collateral in their own marketing activities.
- 13 The Ministry of Business, Innovation and Employment (MBIE) granted Enterprise Dunedin additional \$200k funding for domestic marketing activity to March 2022, through the Strategic Tourism Assets Protection Programme (STAPP).

## RESULTS

- 14 The implementation of the campaign achieved its two key objectives. Visitor spend (measure of visitors to Dunedin) was maintained, awareness and conversation enhanced and increased, and brand attributes reinforced.
- 15 Channels utilised included print, billboards, co-investment with partners, and social and digital advertisements. In the fortnight following the campaign launch, Google Analytics reported the following:
  - A 62% increase in [www.dunedinn.com/visit](http://www.dunedinn.com/visit) website sessions in comparison to 2019;
  - High engagement with domestic audiences in comparison to 2019 with increase of
    - 281% for Auckland-based traffic;
    - 92% for Christchurch-based traffic;
    - 36% for Dunedin-based traffic.

- High engagement with website content relating to campaign creative.
- 16 'Dunedin a pretty good Plan D' on the DunedinNZ social media channels was among Dunedin brand's most liked, shared and talked about posts. The Facebook launch post had a reach of nearly half a million (442,565) and an 18% engagement (level of interaction with followers generated by the content) rate of 81,770.
  - 17 Dunedin received TripAdvisor's Top 12 Emerging Destination's award as a direct result of awareness and media attention for the campaign.
  - 18 Nigel Douglas, CEO at OMD (Campaign Asia's New Zealand Media Agency of the Year 2013, 2014, 2015 and 2016) said:
 

*"It is a fact that Dunedin would be well down the list of places we would visit. This campaign takes that problem and pivots off it in what I like to term a "Judo strategy," turning the "weakness" into a strength. [It]...feels very unique to the destination..."*

*"In my somewhat qualified opinion this is the best tourism campaign in market around COVID-19 to date. Well done...Top marks from me!"*
  - 19 The campaign evaluation survey (Angus & Associates) of 511 people from Canterbury, Wellington and Auckland residents showed after two weeks:
    - 65% strongly agreed or agreed that "The ads make me more likely to visit Dunedin";
    - 81% strongly agreed or agreed that "The ads are intriguing and make me want to find out more about Dunedin";
    - a good level of market break-through ... almost one in five Canterbury and Wellington residents recall having seen the campaign (18% Canterbury, 17% Wellington, 13% Auckland). Campaign recall was highest among those aged 30 – 39 years (24%);
    - Comments included: "I love these ads. They are brilliant. They're acknowledging that we can't go to all these wonderful places overseas, but we can see and do similar things in Dunedin.
  - 20 Media coverage across all channels has been extensive with an estimated audience of over five million and equivalent advertising space rates of nearly \$2.5 million (Isentia Media Monitoring May 2021).
  - 21 Historical monthly spend in Dunedin varies according to season and can differ by up to \$14 million between winter and summer. Pre COVID-19 combined domestic and international spend reached a high of \$44m in February 2020. Of that \$34 million was domestic and \$10 million international.
  - 22 Domestic spend for the year ending March 2021 saw decreases of expenditure in Wellington 20%, Auckland 30%, Queenstown 39%, Rotorua 25% and Fiordland 53%. Regions close to main population centres had minimal increases; Wairarapa 6%, Coromandel 2% and Northland recording a 0% change.
  - 23 For the month ending April 2021, domestic monthly spend in Dunedin was \$36 million. In the previous April periods domestic monthly spend was \$6m (2020) and \$35m (2019).



- 24 For the year ending April 2021, total visitor spend in Dunedin was \$352m. In the previous two years the figures were \$304m (2020) and \$319m (2019).
- 25 Enterprise Dunedin can measure the monthly average numbers and origins of domestic and international visitors in Dunedin on any day which allows visibility on long-term trends. Total visitor numbers in Dunedin decreased by 26% in March 2021 compared to March 2019. Domestic spend of \$33m for both March 2019 and March 2021, reflected a maintained expenditure per visitor to Dunedin across both years.
- 26 A further measure of success can be determined by daily measurement of the digital volume and sentiment relating to Dunedin conversations compared to the rest of New Zealand. The tourism sentiment index (TSI) for Dunedin was higher than New Zealand's and positive conversations regarding Dunedin tourism qualities grew by approximately 28% over the period of the campaign.

### **OPTIONS**

- 27 As this report is for noting, there are no options.

### **NEXT STEPS**

- 28 As the campaign in Australia gains momentum, marketing initiatives with partners including Tourism New Zealand, Dunedin International Airport, Air New Zealand and others, will expand.
- 29 With the opening of the trans-Tasman and Pacific Islands bubbles, further marketing of Dunedin as a destination will need to focus on reinforcing key brand messages.

### **Signatories**

|             |   |
|-------------|---|
| Author:     | Des Adamson - Business Relationship Manager<br>Malcolm Anderson - City Marketing Manager<br>Louise van de Vlierd - Manager Visitor Centre |
| Authoriser: | John Christie - Manager Enterprise Dunedin  |

### **Attachments**

There are no attachments for this report.

**SUMMARY OF CONSIDERATIONS**
***Fit with purpose of Local Government***

This decision promotes the social, economic, cultural and environmental well-being of communities in the present and for the future.

***Fit with strategic framework***

|   | Contributes                         | Detracts                 | Not applicable                      |
|---|-------------------------------------|--------------------------|-------------------------------------|
| Social Wellbeing Strategy               | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>            |
| Economic Development Strategy           | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>            |
| Environment Strategy                    | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>            |
| Arts and Culture Strategy               | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>            |
| 3 Waters Strategy                       | <input type="checkbox"/>            | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| Spatial Plan                            | <input type="checkbox"/>            | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| Integrated Transport Strategy           | <input type="checkbox"/>            | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| Parks and Recreation Strategy           | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>            |
| Other strategic projects/policies/plans | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>            |

***Māori Impact Statement***

Mana whenua have been working with Enterprise Dunedin to define future branding initiatives across all campaign implementation.

***Sustainability***

The implementation of this campaign predates current work with the visitor sector which contributes to enhanced environmental outcomes, including pathways to carbon neutrality.

***LTP/Annual Plan / Financial Strategy /Infrastructure Strategy***

There are no planning or strategic implications.

***Financial considerations***

The activity is within existing operating budgets.

***Significance***
***Engagement – external***

External engagement on the development and implementation of this campaign included the following entities:

Ministry Business Innovation and Employment, Regional Tourism Organisations NZ, neighbouring Regional Tourism entities, Dunedin Host, Visit Dunedin, Dunedin International Airport, individual Dunedin operators, Tourism New Zealand, Brand Aid.

## SUMMARY OF CONSIDERATIONS

### ***Engagement - internal***

Parks and Recreation was included in internal engagement.

### ***Risks: Legal / Health and Safety etc.***

There are no identified risks.

### ***Conflict of Interest***

There are no known conflicts of interest.

### ***Community Boards***

There are no known impacts on Community Boards.

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## **ITEMS FOR CONSIDERATION BY THE CHAIR**

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Any items for consideration by the Chair