

Notice of Meeting:

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

Date: Wednesday 9 February 2022
Time: 1.30 pm (or at the conclusion of the previous meeting)
Venue: Via Audio Visual Link

Sandy Graham
Chief Executive Officer

Economic Development Committee
PUBLIC AGENDA

MEMBERSHIP

Chairperson	Cr Chris Staynes	
Deputy Chairperson	Cr Rachel Elder	Cr Andrew Whiley
Members	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
Senior Officer	John Christie, Manager Enterprise Dunedin	
Governance Support Officer	Wendy Collard	

Wendy Collard
Governance Support Officer

Telephone: 03 477 4000
Wendy.Collard@dcc.govt.nz
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This meeting will be streamed on the Council's YouTube Page <https://youtu.be/EBcyvkwRqzQ>

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

ITEM	TABLE OF CONTENTS	PAGE
1	Public Forum	4
2	Apologies	4
3	Confirmation of Agenda	4
4	Declaration of Interest	5
5	Confirmation of Minutes	15
5.1	Economic Development Committee meeting - 1 November 2021	15
PART A REPORTS (Committee has power to decide these matters)		
6	Economic Development Committee Forward Work Programme	20
7	Economic Development Activity Report for the period to 1 July to 31 December 2021	25
8	STAPP Investment Plan Update	31
9	Dunedin City - Annual Economic Profile March 2021 Update	38
10	Items for Consideration by the Chair	92

1 PUBLIC FORUM

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

2 APOLOGIES

An apology has been received from Cr Doug Hall.

That the Committee:

Accepts the apology from Cr Doug Hall.

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

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

Title	Page
↓A Elected Members' Register of Interests	6

Councillor Register of Interest - Current as at 31 January 2022				
Name	Responsibility (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	Aymed 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.
	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.
	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 Vegetable Growers Club	No conflict identified	Seek advice prior to the meeting if actual or perceived conflict of interest arises.
	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.

Name	Responsibility (i.e. Chairperson etc)	Declaration of Interests	Nature of Potential Interest	Member's Proposed Management Plan
	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.
	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.

Name	Responsibility (i.e. Chairperson etc)	Declaration of Interests	Nature of Potential Interest	Member's Proposed Management Plan
	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 Local Government New Zealand Zone 6 Committee (Council Appointment)	Major supplier to DCC No conflict identified	Seek advice prior to the meeting if actual or perceived conflict of interest arises. 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.
	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.

Name	Responsibility (i.e. Chairperson etc)	Declaration of Interests	Nature of Potential Interest	Member's Proposed Management Plan
	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	Shell Company - RU There	No conflict identified	Seek advice prior to the meeting if actual or perceived conflict of interest arises.
	Shareholder	Startup Business	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.
	Member	Dunedin Public Art Gallery Society (Council appointment)	Possible grants recipient	Withdraw from discussion and leave the table. If in confidential leave the room. Seek advice prior to the meeting.
	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.
	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.
	Secretary	Brockville Improvements and Amenities Society (BIAS)	No conflict identified	Seek advice prior to the meeting if actual or perceived conflict of interest arises.
	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 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.

Name	Responsibility (i.e. Chairperson etc)	Declaration of Interests	Nature of Potential Interest	Member's Proposed Management Plan
	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.
	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.

Name	Responsibility (i.e. Chairperson etc)	Declaration of Interests	Nature of Potential Interest	Member's Proposed Management Plan
	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	No conflict identified	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.
	Director/Shareholder	Southern Properties (2007) Ltd	No conflict identified	Seek advice prior to the meeting if actual or perceived conflict of interest arises.
	Director	Arrenway Drive Investments Limited	No conflict identified	Seek advice prior to the meeting if actual or perceived conflict of interest arises.
	Director	Golden Centre Holdings Ltd	No conflict identified	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.
	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.

Name	Responsibility (i.e. Chairperson etc)	Declaration of Interests	Nature of Potential Interest	Member's Proposed Management Plan
	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	Vandervis 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.
	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.

Name	Responsibility (i.e. Chairperson etc)	Declaration of Interests	Nature of Potential Interest	Member's Proposed Management Plan
	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.
	Chairman	Volunteer South	No conflict identified	Seek advice prior to the meeting if actual or perceived conflict of interest arises.
	Member	Dunedin Otago 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.
	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 Property Investors Association	No conflict identified	Seek advice prior to the meeting if actual or perceived conflict of interest arises.

Name	Responsibility (i.e. Chairperson etc)	Declaration of Interests	Nature of Potential Interest	Member's Proposed Management Plan
	Member	Chisholm Links Golf Club	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 - 1 NOVEMBER 2021

RECOMMENDATIONS

That the Committee:

- a) **Confirms** the minutes of the Economic Development Committee meeting held on 01 November 2021 as a correct record.

Attachments

	Title	Page
A 	Minutes of Economic Development Committee meeting held on 1 November 2021	16

Economic Development Committee

MINUTES

Minutes of an ordinary meeting of the Economic Development Committee held in the Edinburgh Room, Municipal Chambers, The Octagon, Dunedin on Monday 01 November 2021, commencing at 10.00 am

PRESENT

Chairperson	Cr Chris Staynes	
Deputy Chairperson	Cr Rachel Elder	Cr Andrew Whiley
Members	Cr Sophie Barker	Cr Christine Garey
	Cr Doug Hall	Mayor Aaron Hawkins
	Cr Carmen Houlahan	Cr Marie Laufiso
	Cr Jim O'Malley	Cr Jules Radich
	Cr Steve Walker	

IN ATTENDANCE

Sandy Graham (Chief Executive Officer), John Christie (Manager Enterprise Dunedin), Fraser Liggett (Economic Development Programme Manager), Malcolm Anderson (City Marketing Manager), John Gallaher (Chairperson, Grow Dunedin Partnership), Barbara Bridger (Grow Dunedin Partnership), Mike Collins (Grow Dunedin Partnership) and Megan Gibbons (Grow Dunedin Partnership)

Governance Support Officer Wendy Collard

1 PUBLIC FORUM

There was no Public Forum.

2 APOLOGIES

Apologies have been received from Crs David Benson-Pope (on Council business), Mike Lord and Lee Vandervis.

Moved (Cr Chris Staynes/Cr Christine Garey):

That the Committee:

Accepts the apologies from Crs David Benson-Pope (on Council business), Mike Lord and Lee Vandervis.

Motion carried

3 CONFIRMATION OF AGENDA

Moved (Cr Chris Staynes/Cr Rachel Elder):

That the Committee:

Confirms the agenda without addition or alteration.

Motion carried

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.

Crs Barker and Laufiso provided an update to their Register of Interests.

Moved (Cr Chris Staynes/Cr Andrew Whiley):

That the Committee:

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

Motion carried

5 CONFIRMATION OF MINUTES

5.1 ECONOMIC DEVELOPMENT COMMITTEE MEETING - 10 AUGUST 2021

Moved (Cr Chris Staynes/Cr Andrew Whiley):

That the Committee:

- a) **Confirms** the minutes of the Economic Development Committee meeting held on 10 August 2021 as a correct record.

Motion carried (ED/2021/014)

PART A REPORTS

6 ECONOMIC DEVELOPMENT COMMITTEE FORWARD WORK PROGRAMME

A report from Corporate Policy provided for the Economic Development Committee forward work programme for the 2021-2022 year.

Moved (Cr Andrew Whiley/Cr Rachel Elder):

That the Committee:

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

Motion carried

7 ECONOMIC DEVELOPMENT STRATEGY UPDATE 2021

Cr Carmen Houlahan left the meeting at 10:47 am and returned at 10:49 am.

Cr Doug Hall left the meeting at 10:59 am and returned at 11:01 am.

A report prepared by the Grow Dunedin Partnership provided an update on the progress of the actions of the Economic Development Strategy (Strategy) 2013-23.

Mr John Gallaher, Ms Barbara Bridger, Mr Mike Collins, and Ms Megan Gibbons spoke to the report and responded to questions.

Moved (Cr Chris Staynes/Cr Andrew Whiley):

That the Committee:

Notes the Grow Dunedin Partnership report “Dunedin’s Economic Development Strategy – Reflections to 2021”.

Motion carried

8 ECONOMIC DEVELOPMENT ACTIVITY REPORT FOR THE PERIOD TO 30 SEPTEMBER 2021

Cr Carmen Houlahan and Cr Rachel Elder left the meeting at 11.45 am and returned at 11.47 am.

Cr Andrew Whiley left the meeting at 11:58 am and returned at 12:00 p.m..

A report from Enterprise Dunedin provided an update on progress towards achieving levels of service for the Economic Development activity for the period 1 July 2021 to 30 September 2021.

The Chief Executive Officer (Sandy Graham), the Manager, Enterprise Dunedin (John Christie), the Economic Development Programme Manager (Fraser Liggett) and the City Marketing Manager (Malcolm Anderson) spoke to the report and responded to questions.

Moved (Cr Andrew Whiley/Cr Steve Walker):

That the Committee:

- a) **Notes** the update report on the Economic Development activity.

Motion carried

9 ITEMS FOR CONSIDERATION BY THE CHAIR

There were no items for consideration.

The meeting concluded at 12.10 pm.

.....
CHAIRPERSON

PART A REPORTS

ECONOMIC DEVELOPMENT COMMITTEE FORWARD WORK PROGRAMME

Department: Corporate Policy

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.

DISCUSSION

- 3 The forward work programme is a regular agenda item which shows areas of activity, progress and expected timeframes for decision making across a range of areas of work.
- 4 As an update report, purple highlights show changes to timeframes. New items added to the schedule are highlighted in yellow. Items that have been completed or updated are shown as bold.
- 5 Months where no Committee meetings are scheduled are highlighted as grey.

NEXT STEPS

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

Signatories

Author:	Sharon Bodeker - Corporate Planner
Authoriser:	John Christie - Manager Enterprise Dunedin

Attachments

	Title	Page
↓A	Economic Development Forward Work Programme - February 2022	23

Key	
New item	
Changes to timeframes	
Completed; progress to date update	Bold
No meeting month	

Economic Development Committee Forward Work Programme - February 2022											
Area of Work	Reason for Work	Council role (decision and/or direction)	Expected timeframes								
			Jan	Feb	Mar	Apr	May	June	July	Aug	Sept
Enterprise Dunedin Activity Report	To update the Committee on key Economic Development Strategy Activities	Noting the Non-Financial Activity Report. Progress to date: An activity report for the period ending 30 December 2021 will be presented to the February 2022 meeting.		Notes			Notes				
Study Dunedin Education Update Report	To update the Committee on Study Dunedin Activities	Noting the Study Dunedin Education Report. Progress to date: An update report was presented to the June 2021 Committee meeting. A further update will be presented in April 2022.				Update					
Start Up Dunedin Trust Report	To update the Committee on the Start Up Dunedin Trust Activities	Noting the Start Up Dunedin Trust Report Progress to date: An annual update report will be presented to the July 2022 Committee meeting.							Update		
Central of Digital Excellence (CODE) Update Report	To update the Committee on CODE activities	Noting the CODE Update Report Progress to date: A report was presented to the 3 September 2021 Council meeting. An update will be presented to the May 2022 Committee meeting.					Update				
Dunedin Destination Plan	To update the current Dunedin Destination Plan in align with the current city requirement	To adopt the updated Dunedin Destination Plan Progress to date: Public engagement and consultation is ongoing. Delays have arisen due to COVID-19 and the availability of key stakeholders. A report will be presented when engagement on a draft plan has been completed.									

Area of Work	Reason for Work	Council role (decision and/or direction)	Expected timeframes								
			Jan	Feb	Mar	Apr	May	June	July	Aug	Sept
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 Progress to date: An update report was presented to the June Committee meeting. A further update is being presented to the February 2022 Committee meeting.		Update							
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 Progress to date: A Project China update report will be presented in July 2022, previously scheduled for the November 2021 Committee meeting.							Update		
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 Progress to date: An annual economic profile update report will be presented to the February 2022 Committee meeting, previously scheduled for June 2022.		Update							
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 Progress to date: A report will be presented in April 2022, previously scheduled for the November 2021 Committee meeting.				Notes					
Grow Dunedin Partnership	To update the Committee on the Grow Dunedin Partnership Activities	Noting the Grow Dunedin Partnership Report Progress to date: An update report will be presented to the May 2022 Committee meeting, previously scheduled for November 2021.					Notes				
JobDUN Dunedin Business Internship Programme	To update the Committee on the JobDUN Dunedin Business Internship Programme	Notes the update reports. Progress to date: An annual update report will be presented to the July 2022 Committee meeting.							Update		

ECONOMIC DEVELOPMENT ACTIVITY REPORT FOR THE PERIOD TO 1 JULY TO 31 DECEMBER 2021

Department: Enterprise Dunedin

EXECUTIVE SUMMARY

- 1 This report provides an update on progress towards achieving levels of service for the Economic Development activity for the period 1 July 2021 to 31 December 2021, as provided in 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 update report on the Economic Development activity as provided in Attachment A.

DISCUSSION

- 3 The 10 year plan sets out the activities undertaken by Council. Each activity has levels of service that describe what Council will provide to the community, along with measures and targets used to assess the level of achievement in delivering those activities. Council reports on its achievement of all levels of service through its Annual Report.
- 4 Attachment A reports on progress towards achieving the levels of service, measures and targets as detailed in the 10 year plan for Economic Development for the six months to 31 December 2021. Information on specific areas of work is also provided.
- 5 The Residents' Opinion Survey (ROS) is used by Council to measure achievement of some of its levels of service, and the results from the survey are shown in the attached activity report. Respondents of the survey are asked to rate their satisfaction levels for some activities on a scale of 1-10 from very dissatisfied to very satisfied.
- 6 The survey is carried out on a continuous monthly basis, with the aim of getting 100 responses each month. This provides a sample size of around 1,200 for the year, with a six monthly sample size of around 600 residents. A sample size of 600 has an expected margin of error (at the 95% confidence interval) of $\pm 4.1\%$.

NEXT STEPS

- 7 An update report for the nine months to 31 March 2022 will be presented to the May 2022 Committee meeting.

Signatories

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

Attachments

	Title	Page
↓A	Economic Development activity report for the period 1 July to 31 December 2021	27

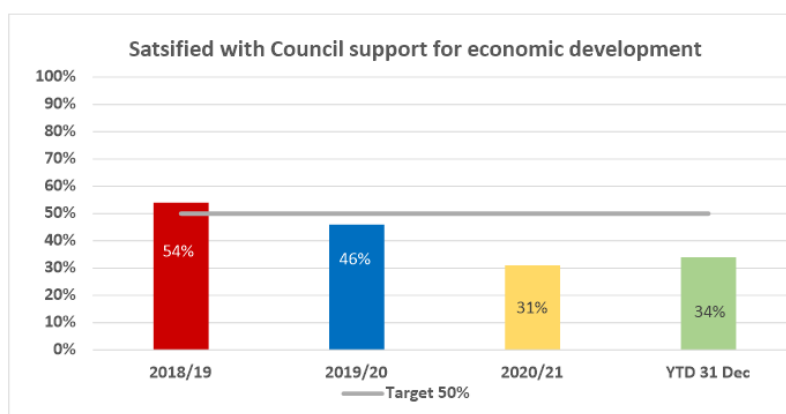
Economic Development

**Activity report for the period
1 July – 31 December 2021**

Economic Development

Economic development and marketing

Level of Service – Enterprise Dunedin provides business sector support and coordinates the marketing of the city for tourism and education and attracting investment and skilled migrants.		Achieved?
Measure:	Percentage of residents satisfied with the Council's support for economic development.	Target not being achieved
Performance target:	50% or more residents are satisfied.	
Achievement to date:	34% of residents are satisfied with the Council's support for economic development.	
Data source:	Residents Opinion Survey	



Enterprise Dunedin is working with a number of stakeholders in many sectors to support and grow our economy. Many activities have been impacted by COVID with the effects impacting tourism, hospitality, and retail. Work is underway to support these sectors with specific funding being provided through the Ministry of Business, Innovation and Employment for tourism and regional economic development initiatives. Marketing campaigns are in development to assist with the recovery of the sectors most severely impacted by COVID especially tourism and international education.

Measure:	Dunedin's share of national domestic visitor spend.	Target achieved to date
Performance target:	Grow 10% year on year.	
Achievement to date:	This is a new measure. Dunedin's 2020/21 baseline was 3.3% share of national domestic visitor spend. For the period July to November 2021 Dunedin achieved 3.8% share of national domestic visitor spend.	
Data source:	MBIE Tourism Electronic Card Transactions.	

COVID-19 and border closures has had an impact on international and trans-Tasman visitors to New Zealand and Dunedin. Although achieving the target to date, it is worth noting that with Auckland in lockdown from August to December, Dunedin's share of domestic visitor spend will be higher during this period.

Level of Service – the i-Site Visitors Centre provides and accessible, accurate tourism information and booking service.		Achieved?
Measure:	Percentage of external customers satisfied with the i-Site Visitor Centre experience.	Target achieved to date
Performance targets:	90% or more of external customers are satisfied.	
Achievement to date:	To date 100% of customers were satisfied with experience.	
Data source:	Independent external survey	

Visitor satisfaction for the Visitor Centre has always been high, however with low visitor numbers due to COVID we are working on a smaller base.

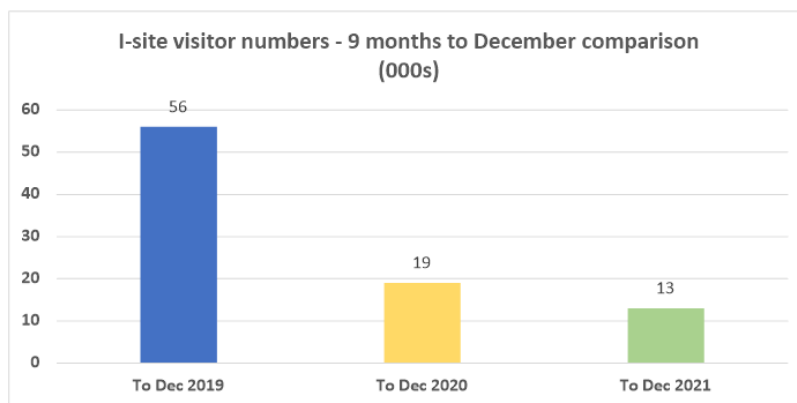
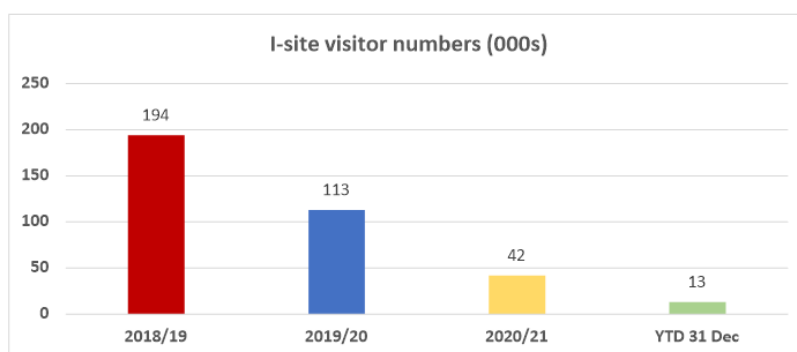
Specific areas of work:

- Business clinics** - 28 business clinics were undertaken between July and December 2021. This compares with 25 in the same period in 2021.
- Start-Up Dunedin Trust** - the following activities were undertaken by Start-Up Dunedin Trust:

	July – December
Start-up Fundamentals	
Founder enquiries	247
Start-up Canvas submissions	64
Start-up Check ins + Feedback Sessions	53
Tertiary Programme	
Tertiary entrepreneurial programme applications	78
Tertiary entrepreneurial programme pitch submissions	16
Incubation Services	
Incubator applications	7
Incubated founders (total)	12
Exited start-ups	2

- CODE** – \$1m grant funding for nine studios was announced on 9 December 2021. This support included \$250,000 for Runaway Play for CODE's first scale up grant. At the same time CODE also announced \$190,000 for the development of vocational education programmes with Otago Polytechnic.
- Film** - 104 film inquiries have been received to date (compared to 92 inquiries Jul-Dec 2020) and 25 film permits (compared to 22 permits Jul-Dec 2020) have been received to date.
- JobDUN** – At December 2021, 22 businesses had registered for 47 JobDUN internships, and 29 interns are confirmed for the 2021/2022 season.

6. **Otago regional economic development agencies (ORED)** – work has continued to identify priority areas for investment as part of Kānoa's \$200m Regional Strategic Partnership Fund. Further engagement is planned between now and March before the draft priorities are finalised.
7. **Pathways Project** - Work continues on the Education New Zealand (ENZ) funded Pathways Project. The Mid Point Milestone report is due at the end of February. The first of four video international case studies on international students in Dunedin has been completed along with four local ambassador stories also completed.
8. **Dunedin Destination Plan** - Stafford Consulting has advised that a draft Dunedin Destination Plan will be available for further engagement with stakeholders in the first quarter of 2022.
9. **i-Site Visitor Centre Visitor Numbers**



During the period July to December 2021 the Auckland lockdown in August, and travel restrictions until 15 December impacted on the number of visitors to Dunedin.

STAPP INVESTMENT PLAN UPDATE

Department: Enterprise Dunedin

EXECUTIVE SUMMARY

- 1 This report is to update the Economic Development Committee on the implementation of the Government funded Strategic Tourism Assets Protection Programme (STAPP) and subsequent additional Tourism Communities: Support, Recovery and Reset Plan (TCSRPP).
- 2 Enterprise Dunedin received \$700,000 to implement STAPP projects between November 2020 and March 2022 and a further \$1 million for ten new projects including additional funding for four existing STAPP projects for implementation by 31 December 2022.
- 3 Several projects have been given an extension until end February 2023 due to delays influenced by COVID-19 alert levels.
- 4 Contractors are being used to deliver projects as they are timebound and require expertise.

RECOMMENDATIONS

That the Committee:

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

DISCUSSION

- 5 A brief overview of the status of the 23 projects is summarised below.

Destination Management and Planning

Iwi Initiatives in Destination Marketing/Management

- 6 This project will be designed to explore new iwi tourism related initiatives in Destination Marketing/Management for engagement and development with mana whenua.

Dunedin Destination Management Plan implementation role

- 7 A role has been approved to champion the implementation of the Dunedin Destination Management Plan (DDMP) and will be progressed as the plan is completed.

OPEX support for new Dunedin Destination Management Plan

- 8 Investment has been approved to support agreed outcomes from the development of the DDMP and will be allocated to projects when the plan is completed.

Dunedin Destination Management Plan

- 9 The first round of consultation started on 9 February 2021 with a situation report released in late August 2021 followed by further consultation. COVID 19 has caused delays in consultation with face-to-face engagement being the preference of some stakeholders. A draft of the document for further stakeholder engagement is expected by end March 2022.

Marketing Cultural Audit

- 10 A cultural audit in consultation with Aukaha will be undertaken when the DDMP is completed.

Data Sharing

- 11 Originally this project aimed to collect data across Dunedin activities and attractions monthly followed by aggregating and summarising it back to the visitor industry to be used as a benchmark. Due to very limited activity over the past two years, with at times no data to share, this project has not progressed. This project will now be reviewed in consultation with the Dunedin Host Board to ascertain what industry might need in any future forecasting and benchmarking data.

Business Events

- 12 From November 2020 consultants Tourism Marketing Solutions have been contracted to connect with at least 100 qualified 'conference buyers' a month in order to establish their interest in holding a Business Event in Dunedin. This has resulted in increased interest in Dunedin, the securing of business leads and a monthly report on all contact calls. MBIE have provided further funding to continue this service until 31 August 2022.

Industry Capability and Product Development

Digital Assets/New Image and Video Assets

- 13 In November 2020 a contractor was appointed to grow DunedinNZ's digital assets and image library to meet the increasing demand of domestic and international visitors looking to visit Dunedin. With the increased use of digital assets and the need to keep imagery fresh and up to date this contract has received further funding until the end October 2022.

Destination Management and Marketing Support Tourism Arts and Cultural Sector

- 14 This project is designed to support the wider arts and cultural sector in Dunedin to become more market ready. Consultation with this group will determine the areas of support that this funding will be applied to.

Product Development Implementation

- 15 This project will assist with feasibility/business plans for initiatives highlighted in the Product Review and will commence once the product development review is completed.

Wellbeing Initiatives

- 16 This is scheduled for winter 2022 to procure qualified wellbeing experts to implement a 1:1 programme for the Tourism sector where any need is identified.

Training Internally

- 17 This will cover additional staff capability building required due to increased destination management expectations.

Product Review

- 18 This project commenced in November 2020 with initial gathering of tourism product data by type. This was updated mid-2021 as the product offering had shrunk with businesses going into hibernation or leaving the market. This data was analysed to determine gaps and potential opportunities for tourism product. Following the gap analysis, in January 2022 a group of industry product experts from around the country gathered in Dunedin to access gaps and opportunities. Workshops are now being scheduled with industry stakeholders for February – March 2022 to investigate subsequent opportunities. A final report is expected late March 2022.

Community Sentiment

- 19 Angus and Associates completed the first Community Sentiment survey of Dunedin resident's regarding tourism in August 2020. 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. A second survey is to be undertaken for completion by June 2022 which will show any major shifts in community sentiment. The first survey results have been shared with the DDMP consultants.

Crisis Resilience

- 20 Consultant "Resilient Organisations" was contracted to assist tourism operators create or update their existing Crisis Resilience Plans. Operators were invited to complete a confidential online survey to give the consultant the ability to assess current Resilience Plans. The consultants then reviewed the individual survey outcomes and produced a report including recommendations for improvement to each participant. Workshops were held to assist the development or upgrade of existing Crisis Resilience Plans.
- 21 In May 2021 participating operators were invited and encouraged to join three online workshops focusing on:
- planning for an uncertain future;
 - being ready for anything; and
 - business continuity planning.

Pathways to Carbon Neutrality

- 22 A webinar for tourism operators was run by consultants EKOS and Coffey, who outlined the importance of measurement, reduction, and offsetting carbon. In June 2021 the consultants ran a workshop outlining an on-line carbon measurement tool and how tourism operators could use it to work towards carbon neutrality. This initiated conversations about how visitors to Dunedin can contribute to the City achieving carbon neutrality by 2030.

Regional Collaboration

- 23 Ongoing funding has been allocated to 45 South and Otago Cycle Trails Collective projects. MOU's have been extended with both groups.

The 45 South project will be delivered through Great South and cover:

- the continued employment of a Touring Route Development Advisor;
- visitor insights data; and

- implementation of the project business plan.

The Otago Cycle Trail Collective project will be administered by Central Otago Tourism and covers:

- promotion of 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; and
- 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.

Industry Capability and Product Development

Digital Support

- 24 This provides digital support and digital analysis to better inform and implement our targeted campaign marketing. Additional funding has been received through to February 2023.

Digital Content

- 25 This is a new project to employ or contract assistance to refresh and update our written digital content.

Campaign Oversight

- 26 The funding for this project will assist in the coordination of campaigns including liaison with campaign agencies and partnering operators. This is due to commence in February 2022.

International Marketing

- 27 This is in the planning stage and will be dependent on Tourism New Zealand planned campaigns and influenced by the planned opening of borders.

New Signature Event Promotion

- 28 This is planned for 2022 in conjunction with new events funded by the Regional Events Fund.

Destination Marketing

- 29 Programmes to enhance domestic destination marketing have been implemented and will be ongoing and aligned with partners including Tourism New Zealand and Air New Zealand.

OPTIONS

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

NEXT STEPS

- 31 Implementation will continue with these projects, with six monthly reporting to MBIE and Council's Economic Development Committee.

Signatories

Author:	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 promotes the economic, social, environmental, and cultural wellbeing 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 type="checkbox"/>
Spatial Plan	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Integrated Transport Strategy	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Parks and Recreation Strategy	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other strategic projects/policies/plans	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Māori Impact Statement

Engagement with mana whenua is occurring through the consultant Stafford Strategy for the rewrite of the DDMP.

Sustainability

The Carbon Neutrality project will enable operators to measure their carbon footprint and plan to reduce and mitigate any impact from tourism contributing to the Council's goal of achieving carbon neutrality by 2030.

LTP/Annual Plan / Financial Strategy /Infrastructure Strategy

There are no implications.

Financial considerations

The STAPP programme received \$1.7 million from MBIE.

Significance

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

Engagement – external

There has been ongoing external engagement across a wider visitor sector stakeholder base. For the DMP re-write this has included but not been limited to Dunedin Host, Education Sector, CODE, Port Otago, ORC, Arts Sectors and Transport Sector. The sustainability and crisis resilience projects have engaged with the wider visitor and hospitality sectors.

Engagement - internal

Engagement has been across a wide range of departments including, Transportation, Parks and Recreation, Community Development and Events, Toitu and the Art Gallery.

Risks: Legal / Health and Safety etc.

There are no known risks.

SUMMARY OF CONSIDERATIONS

Conflict of Interest

There are no known conflicts of interest.

Community Boards

Community boards have been consulted as part of the Destination Management Plan rewrite process and will be involved in other projects as they are developed.

DUNEDIN CITY - ANNUAL ECONOMIC PROFILE MARCH 2021 UPDATE

Department: Enterprise Dunedin

EXECUTIVE SUMMARY

- 1 This report provides an update on the Infometrics Annual Economic Profile to March 2021 and Statistics New Zealand estimates to November 2021.

RECOMMENDATIONS

That the Committee:

- a) **Notes** the Dunedin City – Annual Economic Profile March 2021 Update.

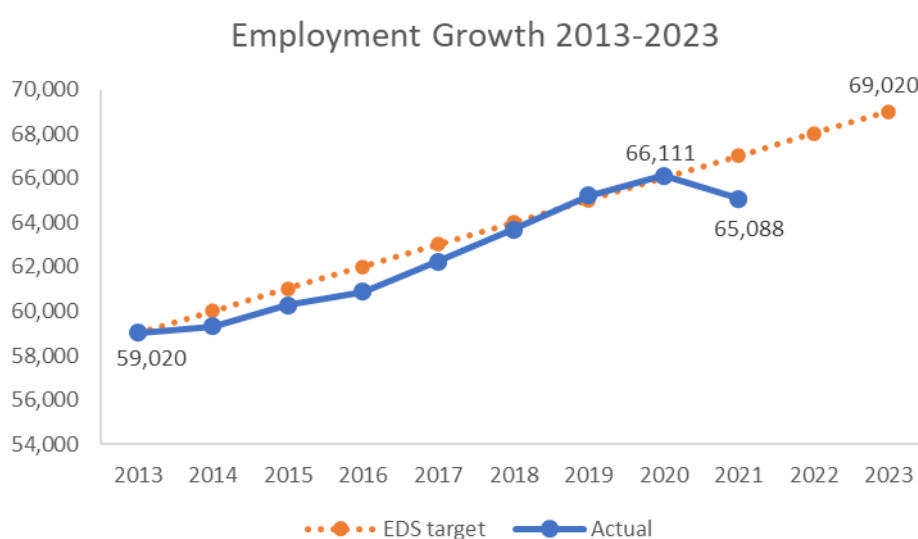
BACKGROUND

- 2 Enterprise Dunedin's activity is informed by the 2013-23 Economic Development Strategy (EDS). The EDS is underpinned by five themes:
 - Business Vitality – to improve the ease of doing business.
 - Alliances for innovation – to improve linkages between industry and research.
 - A hub for skills and talent – to increase retention of graduates, build the skills base and grow migrant numbers.
 - Linkages beyond our borders – to increase international investment and establish projects with other cities.
 - A compelling destination – to increase the value of tourism and events and improve the understanding of Dunedin's advantages.
- 3 The EDS sets out two overarching economic goals:
 - a) 10,000 extra jobs over 10 years
 - b) An average \$10,000 extra income for each person.
- 4 The Regional Economic Profile provides an in-depth annual description of Dunedin's economy and performance to the year ending 31 March. Information on wages and self-employment are

collected after this period by Inland Revenue, which means there is a time-lag in the report being produced by Infometrics.

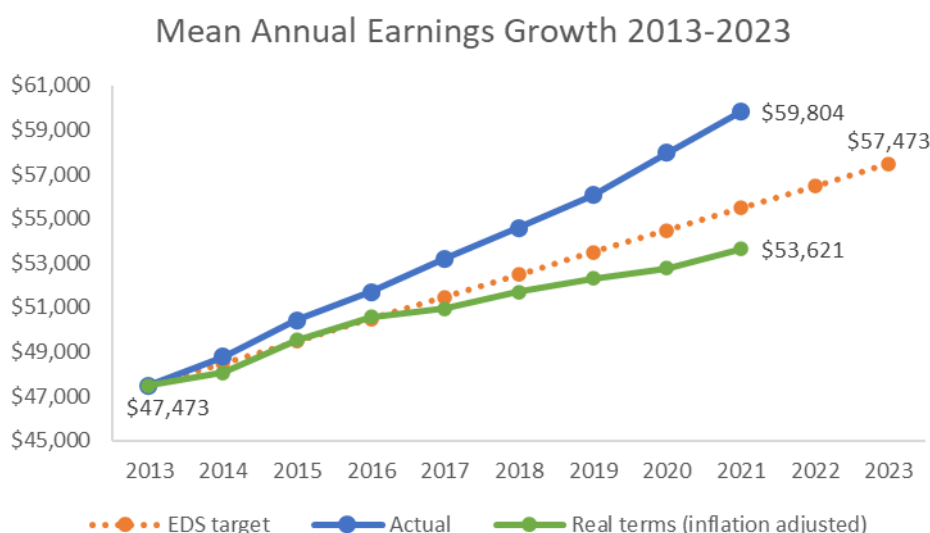
DISCUSSION

- 5 Infometrics noted a 1.5% decline in the number of jobs in Dunedin in the year ending March 2021 year. This was primarily centred on education, manufacturing, information media, arts and recreational services and retail. These declines were partly offset by increasing job numbers in construction, public administration, professional, scientific and technical services.
- 6 In the eight-year period, overall jobs have increased by 6,068 since the adoption of the 2013-2023 EDS. In the decade prior to the EDS, jobs increased by 2,288.



- 7 Infometrics data noted that average earnings for the year ending March 2021 year were \$59,804, 3.2% higher than the previous year.

- 8 The chart below highlights average wage earnings growth (inflation adjusted) tracking just below what is required to lift incomes by \$10,000 per person over the EDS 10-year period.



Employment and wage trends since March 2021

- 9 Statistics New Zealand data (based on payday payroll filings), notes that job numbers in Dunedin during November 2021 were up 3.0% from November 2020 and 2.3% higher than the November 2019 level before (COVID-19).
- 10 The data shows that construction, public administration, professional, scientific and technical services continued to play a key role in job growth up to November 2021.
- 11 While expenditure on hospitality has declined, employment in the accommodation and food services sector has held up.
- 12 Ministry of Social Development (MSD) data indicates 4,164 people in Dunedin were receiving Jobseeker Support in November 2021. This compares to 4,500 jobseeker recipients in November 2020.

OPTIONS

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

NEXT STEPS

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

Signatories

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

Attachments

	Title	Page
↓A	Infometrics - Dunedin Annual Economic Profile to March 2021	44

SUMMARY OF CONSIDERATIONS

Fit with purpose of Local Government

This report tracks 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 type="checkbox"/>	<input type="checkbox"/>	<input checked="" 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 Maori.

Sustainability

Data from the Infometrics Annual Economic Profile report will inform Economic Development Strategy partners with future decision making.

LTP/Annual Plan / Financial Strategy /Infrastructure Strategy

Enterprise Dunedin activities and delivery on the 2013-2023 Economic Development Strategy are included in the 2018-2028 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 produce 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.

SUMMARY OF CONSIDERATIONS

Community Boards

There are no known implications for Community Boards.



Dunedin City



TABLE OF CONTENTS

ECONOMY	2
The New Zealand economy in 2021	2
How fast has Dunedin City's economy grown?	3
What is the industrial structure of Dunedin City's economy?	4
Which broad industries made the largest contribution to economic growth?	8
Which detailed industries made the largest contribution to economic growth?	9
In which industries does Dunedin City have a comparative advantage?	11
EMPLOYMENT	13
How fast has employment grown in Dunedin City?	13
What is the industrial structure of employment in Dunedin City?	15
Which are the largest employing industries in Dunedin City?	16
Which industries have created the most jobs?	18
What proportion of the workforce is self-employed in Dunedin City?	20
PRODUCTIVITY	21
What are the most productive industries in Dunedin City?	23
BUSINESS GROWTH	24
How fast did the number of business units grow in Dunedin City?	24
POPULATION GROWTH	26
How fast has Dunedin City's population grown?	26
What is the source of Dunedin City's population growth?	28
What is the age structure of Dunedin City's population?	29
STANDARD OF LIVING	30
What are the mean earnings in Dunedin City?	30
How do house prices in Dunedin City compare?	32
How affordable is housing in Dunedin City?	33
WORKFORCE AND SKILLS	34
How do skill levels in Dunedin City compare with New Zealand?	34
What is the occupational structure of employment in Dunedin City?	35
Employment in knowledge intensive industries in Dunedin City	37
What are the top knowledge intensive industries in Dunedin City?	38
Which qualifications are in demand in Dunedin City?	39
TOURISM	41
Tourism GDP	41
Tourism Employment	42
TECHNICAL NOTES	43

ECONOMY

The New Zealand economy in 2021

The New Zealand economy contracted 1.2% in the March 2021 year, following revised 2.2%pa growth in the year 2020 year. The March 2021 year captures the initial turmoil of COVID-19 in New Zealand, including the vast majority of the Level 4 lockdown in April 2020. The period also includes the August 2020 Auckland outbreak and resulting Level 3 restrictions, as well as further Auckland restrictions in February and March 2021.

The 1.2% fall in economic activity in the 2021 year was slightly less of an economic blow than the 1.3% fall experienced in 2009 as the Global Financial Crisis (GFC) hit. New Zealand's economic response to COVID-19 has been different, with substantial fiscal spending support and incredibly accommodative monetary policy with record-low interest rates.

A need to expand the public sector to support New Zealand through COVID-19 has seen the public administration and safety industry as the largest positive contributor to growth in 2021. Expanded work with MIQ, administering the Wage Subsidy, and more work across government has contributed to this growth. Retail trade also helped limit the economic blow, with higher spending on groceries and more spending on goods in New Zealand as households direct their holiday funds into other areas. Unsurprisingly for a health crisis, the health care and social assistance sector also helped bolster activity.

However, 11 out of 19 headline sectors experienced a contraction in activity. The collapse of international tourism hit the transport sector particularly hard, with a 20% collapse in activity. Administrative and support services also fell, as travel agency work plummeted.

The fall in economic activity in many sectors of the economy was largely due to the restrictions on activity at higher Alert Levels. For example, the contraction in construction output was due to the inability to build at higher Alert Levels, with workers having to stay home.

Employment activity held up better, with a limited 0.1% increase in the number of filled jobs across New Zealand. The Wage Subsidy enabled businesses to keep more workers employed than otherwise. Some sectors have seen considerable increases in their workforce, and others have seen large drops, as resources are reallocated across New Zealand.

The economy showed stronger signs towards the end of the 2021 year, with expectations for better activity to be reported for the 2022 year.

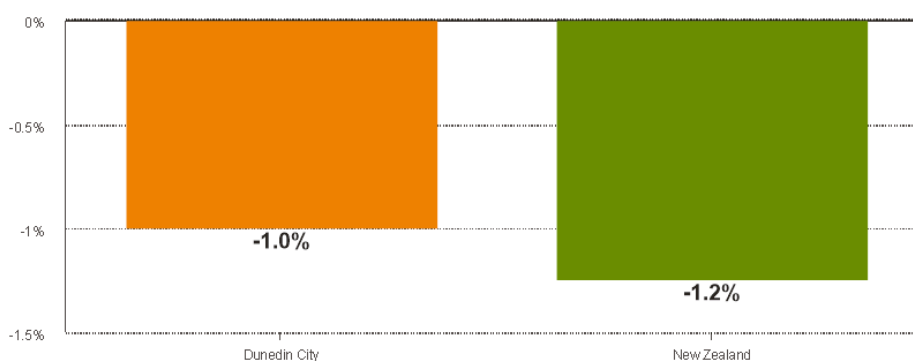
3 **Dunedin City Annual Economic Profile 2021**

How fast has Dunedin City's economy grown?

This section measures economic performance in Dunedin City during the year to March 2021 and previous years. All GDP estimates are measured in constant 2021 prices.

- GDP in Dunedin City measured \$6,828m in the year to March 2021, down -1.0% from a year earlier. New Zealand's GDP decreased by -1.2% over the same period.
- Economic growth in Dunedin City averaged 1.9%pa over the last 10 years compared with an average of 2.6%pa in the national economy.
- Growth in Dunedin City reached a high of 5.1% in 2003 and a low of -1.7% in 2010.
- Dunedin City accounted for 2.1% of national GDP in 2021.

Figure 1: GDP growth, year to Mar 2021



4

Dunedin City Annual Economic Profile 2021

Figure 2: Annual average GDP growth, 2001-2021

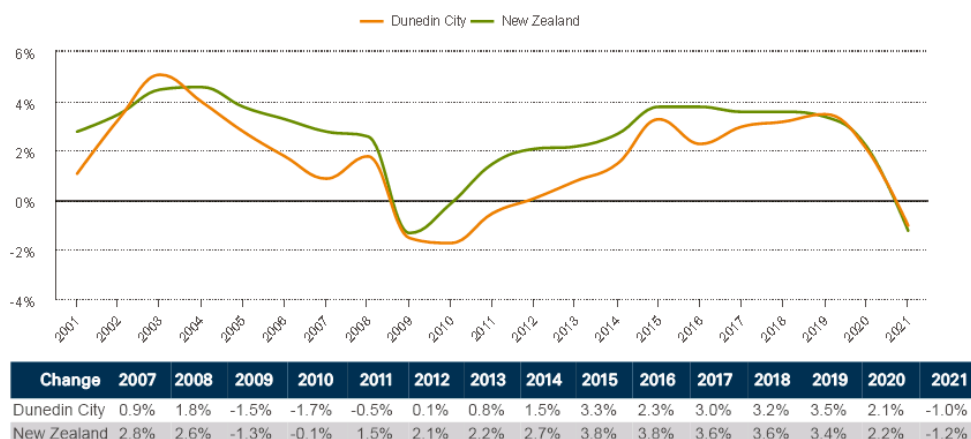
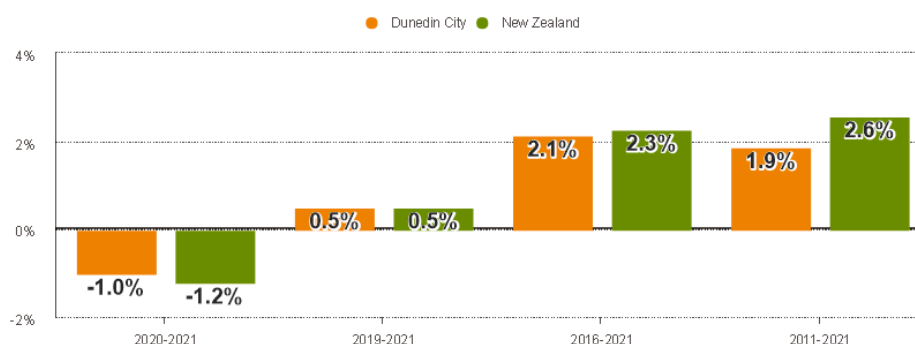


Figure 3: GDP growth over the last 1, 2, 5 & 10 years

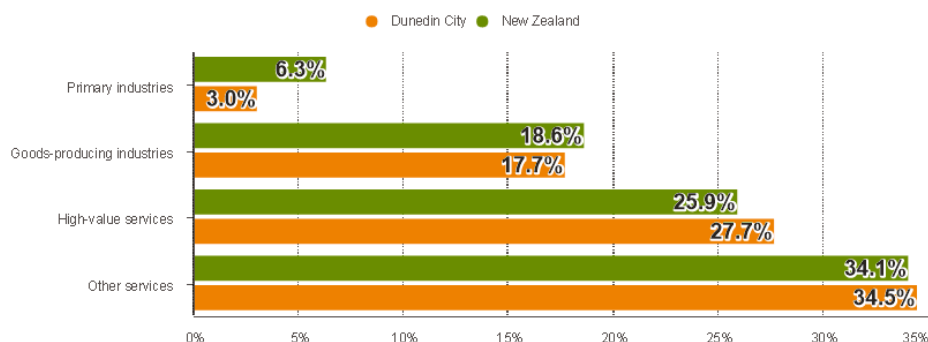


What is the industrial structure of Dunedin City's economy?

This section describes the structure of the economy in terms of the broad sectors of primary industries, goods-producing industries, high-values services and other services. Primary industries make direct use of natural resources. They extract or harvest products from the earth. Goods-producing industries produce manufactured and other processed goods. High-value services include the higher value-adding, knowledge-based service industries. More detail of the sectors is given in the technical appendix.

5 **Dunedin City Annual Economic Profile 2021**

Figure 4: Share of total GDP, 2021



- Primary industries accounted for the smallest proportion in Dunedin City: 3.0% compared with 6.3% in the national economy.
- Goods-producing industries accounted for 17.7% compared with 18.6% in the national economy.
- Other services accounted for the largest proportion of GDP (34.5%) in Dunedin City, which is higher than in the national economy (34.1%).
- High-value services accounted for 27.7% compared with 25.9% in the national economy.

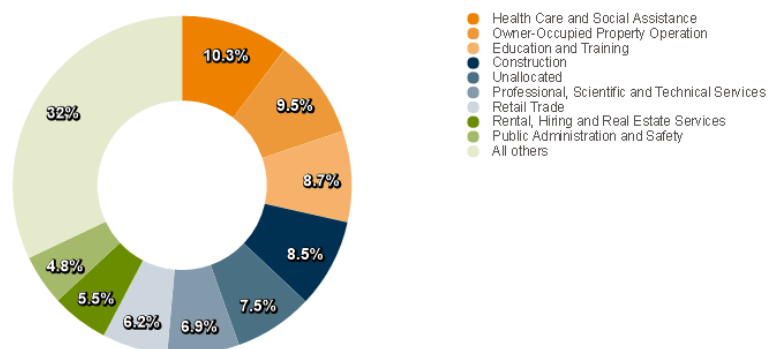
Table 1: GDP by ANZSIC 1-digit industry, 2021

Industry	Dunedin City		New Zealand	
	Level	Share of total	Level	Share of total
Health Care and Social Assistance	\$702m	10.3%	\$20,217m	6.2%
Education and Training	\$595m	8.7%	\$11,730m	3.6%
Construction	\$581m	8.5%	\$21,578m	6.6%
Professional, Scientific and Technical Services	\$468m	6.8%	\$28,779m	8.8%
Retail Trade	\$426m	6.2%	\$17,105m	5.2%
Rental, Hiring and Real Estate Services	\$373m	5.5%	\$21,591m	6.6%
Public Administration and Safety	\$330m	4.8%	\$15,570m	4.8%
Electricity, Gas, Water and Waste Services	\$327m	4.8%	\$8,804m	2.7%
Manufacturing	\$302m	4.4%	\$30,248m	9.3%
Transport, Postal and Warehousing	\$284m	4.2%	\$11,507m	3.5%
Accommodation and Food Services	\$212m	3.1%	\$6,405m	2.0%
Financial and Insurance Services	\$204m	3.0%	\$18,745m	5.7%
Wholesale Trade	\$201m	2.9%	\$16,581m	5.1%
Agriculture, Forestry and Fishing	\$170m	2.5%	\$17,030m	5.2%
Information Media and Telecommunications	\$155m	2.3%	\$12,158m	3.7%
Other Services	\$116m	1.7%	\$5,615m	1.7%
Administrative and Support Services	\$92.0m	1.3%	\$5,577m	1.7%
Arts and Recreation Services	\$91.3m	1.3%	\$3,984m	1.2%
Mining	\$34.1m	0.5%	\$3,378m	1.0%
Owner-Occupied Property Operation	\$650m	9.5%	\$25,112m	7.7%
Unallocated	\$514m	7.5%	\$24,586m	7.5%
Total	\$6,828m	100%	\$326,300m	100%

6 **Dunedin City Annual Economic Profile 2021**

- Among broad industries Health Care and Social Assistance was the largest in Dunedin City in 2021 accounting for 10.3% of total.
- The second largest was Education and Training (8.7%) followed by Construction (8.5%)

Figure 5: Share of total GDP, 2021



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 2021 accounting for 10.3% of total.
- The second largest was Education & Training (8.7%) followed by Professional, Scientific & Tech Services (6.8%)

Table 2: GDP by 54 industries, 2021

Industry	Dunedin City		New Zealand	
	Level	Share of total	Level	Share of total
Health Care & Social Assistance	\$702m	10.3%	\$20,217m	6.2%
Education & Training	\$595m	8.7%	\$11,730m	3.6%
Professional, Scientific & Tech Services	\$468m	6.8%	\$28,779m	8.8%
Property Operators & Real Estate Services	\$314m	4.6%	\$18,164m	5.6%
Central Gov Admin, Defence & Safety	\$289m	4.2%	\$13,720m	4.2%
Electricity & Gas Supply	\$277m	4.1%	\$7,272m	2.2%
Construction Services	\$257m	3.8%	\$11,036m	3.4%
Other Store & Non Store Retailing	\$223m	3.3%	\$9,631m	3.0%
Heavy & Civil Engineering Construction	\$213m	3.1%	\$5,815m	1.8%
Accommodation & Food Services	\$212m	3.1%	\$6,405m	2.0%
Wholesale Trade	\$201m	2.9%	\$16,581m	5.1%
Postal, Courier & Warehousing Services	\$155m	2.3%	\$5,882m	1.8%
Supermarket & Specialised Food Retailing	\$144m	2.1%	\$5,098m	1.6%
Finance	\$130m	1.9%	\$12,476m	3.8%
Road Transport	\$116m	1.7%	\$4,621m	1.4%
Other Services	\$116m	1.7%	\$5,615m	1.7%
Building Construction	\$111m	1.6%	\$4,727m	1.4%
Information Media Services	\$104m	1.5%	\$3,356m	1.0%
Administrative & Support Services	\$92.0m	1.3%	\$5,577m	1.7%
Arts & Recreation Services	\$91.3m	1.3%	\$3,984m	1.2%
Auxiliary Finance & Insurance Services	\$62.1m	0.9%	\$3,415m	1.0%
Motor Vehicle, Parts & Fuel Retailing	\$59.6m	0.9%	\$2,376m	0.7%
Rental & Hiring Services	\$59.6m	0.9%	\$3,427m	1.1%
Machinery & Other Equipment Manu	\$59.2m	0.9%	\$4,270m	1.3%
Telecomms, Internet & Library Services	\$51.3m	0.8%	\$8,801m	2.7%
Water, Sewerage & Waste Services	\$49.8m	0.7%	\$1,532m	0.5%
Fabricated Metal Product Manufacturing	\$49.7m	0.7%	\$2,555m	0.8%
Forestry & Logging	\$46.2m	0.7%	\$2,039m	0.6%
Local Government Administration	\$41.4m	0.6%	\$1,849m	0.6%
Sheep, Beef Cattle & Grain Farming	\$37.6m	0.6%	\$3,315m	1.0%
Dairy Cattle Farming	\$34.2m	0.5%	\$6,461m	2.0%
Mining	\$34.1m	0.5%	\$3,378m	1.0%
Printing	\$27.7m	0.4%	\$661m	0.2%
Beverage & Tobacco Product Manu	\$24.3m	0.4%	\$2,640m	0.8%
Transport Equipment Manufacturing	\$23.1m	0.3%	\$1,571m	0.5%
Fruit, Cereal & Other Food Product Manu	\$21.9m	0.3%	\$2,604m	0.8%
Agric Support Services & Hunting	\$21.6m	0.3%	\$2,616m	0.8%
Wood Product Manufacturing	\$17.0m	0.2%	\$1,762m	0.5%
Fishing & Aquaculture	\$13.7m	0.2%	\$500m	0.2%
Furniture & Other Manufacturing	\$13.6m	0.2%	\$950m	0.3%
Rail, Water, Air & Other Transport	\$12.3m	0.2%	\$1,004m	0.3%
Insurance & Superannuation Funds	\$12.1m	0.2%	\$2,855m	0.9%
Basic Chemical & Chemical Product Manu	\$11.9m	0.2%	\$1,818m	0.6%
Meat & Meat Product Manufacturing	\$11.5m	0.2%	\$2,365m	0.7%
Poultry, Deer & Other Livestock Farming	\$11.3m	0.2%	\$462m	0.1%
Non-Metallic Mineral Product Manu	\$11.0m	0.2%	\$1,386m	0.4%
Textile, Leather, Clothing, Footwear Manu	\$8.80m	0.1%	\$703m	0.2%
Primary Metal & Metal Product Manu	\$6.98m	0.1%	\$727m	0.2%
Polymer Product & Rubber Product Manu	\$5.90m	0.1%	\$1,562m	0.5%
Horticulture & Fruit Growing	\$5.48m	0.1%	\$1,638m	0.5%
Pulp & Paper Product Manufacturing	\$4.64m	0.1%	\$952m	0.3%
Seafood Processing	\$3.42m	0.1%	\$501m	0.2%
Petroleum & Coal Product Manufacturing	\$0.88m	0.0%	\$1,421m	0.4%
Dairy Product Manufacturing	\$0.52m	0.0%	\$1,800m	0.6%
Owner-Occupied Property Operation	\$650m	9.5%	\$25,112m	7.7%
Unallocated	\$514m	7.5%	\$24,586m	7.5%
Total	\$6,828m	100%	\$326,300m	100%

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.

- Health Care and Social Assistance made the largest contribution to overall growth in Dunedin City between 2020 and 2021. The industry grew by 2.5% over the year and contributed 0.24 percentage points to the district's total growth of -1.0%.
- The next largest contributor was electricity, gas, water and waste services (0.20 percentage points) followed by public administration and safety (0.19 percentage points).
- The largest detractor from growth over the year was Transport, Postal and Warehousing which declined by 16.8% and contributed -0.83 percentage points to the total growth of -1.0%. Administrative and Support Services (-0.37 percentage points) was the next largest detractor.

Table 3: ANZSIC 1-digit industries ranked by % point contribution to GDP growth, 2020-2021

Industry	2020	2021	% point contribution to growth	Annual Growth
Health Care and Social Assistance	685	702	0.24%	2.5%
Electricity, Gas, Water and Waste Services	313	327	0.20%	4.5%
Public Administration and Safety	317	330	0.19%	4.1%
Rental, Hiring and Real Estate Services	361	373	0.18%	3.5%
Financial and Insurance Services	193	204	0.16%	5.8%
Retail Trade	416	426	0.15%	2.5%
Agriculture, Forestry and Fishing	162	170	0.12%	5.2%
Information Media and Telecommunications	151	155	0.05%	2.5%
Mining	31	34	0.04%	9.3%
Construction	585	581	-0.06%	-0.7%
Other Services	121	116	-0.07%	-3.9%
Professional, Scientific and Technical Services	473	468	-0.08%	-1.1%
Accommodation and Food Services	225	212	-0.19%	-5.7%
Wholesale Trade	215	201	-0.21%	-6.7%
Manufacturing	317	302	-0.22%	-4.8%
Arts and Recreation Services	108	91	-0.24%	-15.5%
Education and Training	614	595	-0.28%	-3.1%
Administrative and Support Services	118	92	-0.37%	-21.9%
Transport, Postal and Warehousing	341	284	-0.83%	-16.8%
Owner-Occupied Property Operation	617.8	649.5	0.46%	5.1%
Unallocated	531.7	514.4	-0.25%	-3.2%
Total	6,896	6,828	-1.0%	-1.0%

9

Dunedin City **Annual Economic Profile 2021**

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.

- Health Care & Social Assistance made the largest contribution to overall growth in Dunedin City between 2020 and 2021. The industry grew by 2.5% over the year and contributed 0.24 percentage points to the district's total growth of -1.0%.
- The next largest contributor was property operators & real estate services (0.24 percentage points) followed by electricity & gas supply (0.19 percentage points).
- The largest detractor from growth over the year was Rail, Water, Air & Other Transport which declined by 68.9% and contributed -0.40 percentage points to the total growth of -1.0%. Administrative & Support Services (-0.37 percentage points) was the next largest detractor.

Table 4: 54 industries ranked by percentage point contribution to growth, 2020-2021

Industry	2020	2021	% point contribution to growth	Annual Growth
Health Care & Social Assistance	685	702	0.24%	2.5%
Property Operators & Real Estate Services	297	314	0.24%	5.5%
Electricity & Gas Supply	263	277	0.19%	5.1%
Auxiliary Finance & Insurance Services	54	62	0.11%	14.6%
Central Gov Admin, Defence & Safety	282	289	0.10%	2.5%
Supermarket & Specialised Food Retailing	137	144	0.10%	4.8%
Telecomms, Internet & Library Services	45	51	0.09%	13.5%
Local Government Administration	36	41	0.08%	16.2%
Finance	125	130	0.07%	4.1%
Forestry & Logging	41	46	0.07%	11.8%
Other Store & Non Store Retailing	218	223	0.06%	1.9%
Machinery & Other Equipment Manu	55	59	0.06%	6.9%
Mining	31	34	0.04%	9.3%
Heavy & Civil Engineering Construction	211	213	0.03%	1.0%
Agric Support Services & Hunting	20	22	0.02%	8.4%
Meat & Meat Product Manufacturing	10	12	0.02%	12.1%
Building Construction	110	111	0.01%	0.8%
Sheep, Beef Cattle & Grain Farming	37	38	0.01%	2.2%
Water, Sewerage & Waste Services	49	50	0.01%	1.4%
Fishing & Aquaculture	13	14	0.01%	4.2%
Horticulture & Fruit Growing	5	5	0.01%	8.9%
Non-Metallic Mineral Product Manu	11	11	0.00%	2.9%
Poultry, Deer & Other Livestock Farming	11	11	0.00%	2.6%
Dairy Product Manufacturing	0	1	0.00%	29.4%
Pulp & Paper Product Manufacturing	5	5	0.00%	0.6%
Furniture & Other Manufacturing	14	14	0.00%	0.2%
Petroleum & Coal Product Manufacturing	1	1	0.00%	-4.9%
Seafood Processing	3	3	0.00%	-2.2%
Dairy Cattle Farming	34	34	0.00%	-0.5%
Wood Product Manufacturing	17	17	0.00%	-1.2%
Motor Vehicle, Parts & Fuel Retailing	60	60	-0.01%	-0.7%
Textile, Leather, Clothing, Footwear Manu	9	9	-0.01%	-5.0%
Polymer Product & Rubber Product Manu	7	6	-0.01%	-10.8%
Basic Chemical & Chemical Product Manu	13	12	-0.02%	-9.3%
Insurance & Superannuation Funds	14	12	-0.03%	-12.9%
Beverage & Tobacco Product Manu	26	24	-0.03%	-7.7%
Transport Equipment Manufacturing	25	23	-0.03%	-8.9%
Information Media Services	106	104	-0.03%	-2.2%
Fruit, Cereal & Other Food Product Manu	25	22	-0.04%	-11.2%
Printing	31	28	-0.04%	-9.5%
Primary Metal & Metal Product Manu	10	7	-0.04%	-30.6%
Rental & Hiring Services	63	60	-0.05%	-5.9%
Other Services	121	116	-0.07%	-3.9%
Fabricated Metal Product Manufacturing	55	50	-0.07%	-9.3%
Professional, Scientific & Tech Services	473	468	-0.08%	-1.1%
Construction Services	264	257	-0.10%	-2.6%
Road Transport	127	116	-0.15%	-8.1%
Accommodation & Food Services	225	212	-0.19%	-5.7%
Wholesale Trade	215	201	-0.21%	-6.7%
Arts & Recreation Services	108	91	-0.24%	-15.5%
Education & Training	614	595	-0.28%	-3.1%
Postal, Courier & Warehousing Services	175	155	-0.29%	-11.3%
Administrative & Support Services	118	92	-0.37%	-21.9%
Rail, Water, Air & Other Transport	40	12	-0.40%	-68.9%
Owner-Occupied Property Operation	617.8	649.5	0.46%	5.1%
Unallocated	531.7	514.4	-0.25%	-3.2%
Total	6,896	6,828	-1.0%	-1.0%

11

Dunedin City Annual Economic Profile 2021

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 = 2.4), Printing (2.0), and Electricity & Gas Supply (1.8).

Table 5: Location Quotient, 2021

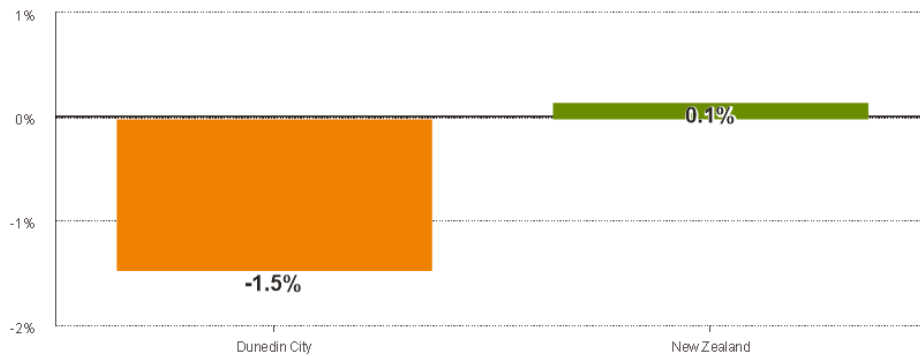
Industry	Dunedin City		New Zealand
	Location Quotient	Share of total GDP	Share of total GDP
Education & Training	2.4	8.7%	3.6%
Printing	2.0	0.4%	0.2%
Electricity & Gas Supply	1.8	4.1%	2.2%
Heavy & Civil Engineering Construction	1.8	3.1%	1.8%
Health Care & Social Assistance	1.7	10.3%	6.2%
Accommodation & Food Services	1.6	3.1%	2.0%
Water, Sewerage & Waste Services	1.6	0.7%	0.5%
Information Media Services	1.5	1.5%	1.0%
Supermarket & Specialised Food Retailing	1.4	2.1%	1.6%
Fishing & Aquaculture	1.3	0.2%	0.2%
Postal, Courier & Warehousing Services	1.3	2.3%	1.8%
Road Transport	1.2	1.7%	1.4%
Motor Vehicle, Parts & Fuel Retailing	1.2	0.9%	0.7%
Poultry, Deer & Other Livestock Farming	1.2	0.2%	0.1%
Building Construction	1.1	1.6%	1.4%
Construction Services	1.1	3.8%	3.4%
Other Store & Non Store Retailing	1.1	3.3%	3.0%
Arts & Recreation Services	1.1	1.3%	1.2%
Forestry & Logging	1.1	0.7%	0.6%
Local Government Administration	1.1	0.6%	0.6%
Central Gov Admin, Defence & Safety	1.0	4.2%	4.2%
Other Services	1.0	1.7%	1.7%
Fabricated Metal Product Manufacturing	0.9	0.7%	0.8%
Auxiliary Finance & Insurance Services	0.9	0.9%	1.0%
Rental & Hiring Services	0.8	0.9%	1.1%
Property Operators & Real Estate Services	0.8	4.6%	5.6%
Administrative & Support Services	0.8	1.3%	1.7%
Professional, Scientific & Tech Services	0.8	6.8%	8.8%
Transport Equipment Manufacturing	0.7	0.3%	0.5%
Furniture & Other Manufacturing	0.7	0.2%	0.3%
Machinery & Other Equipment Manu	0.7	0.9%	1.3%
Textile, Leather, Clothing, Footwear Manu	0.6	0.1%	0.2%
Rail, Water, Air & Other Transport	0.6	0.2%	0.3%
Wholesale Trade	0.6	2.9%	5.1%
Sheep, Beef Cattle & Grain Farming	0.5	0.6%	1.0%
Finance	0.5	1.9%	3.8%
Mining	0.5	0.5%	1.0%
Wood Product Manufacturing	0.5	0.2%	0.5%
Primary Metal & Metal Product Manu	0.5	0.1%	0.2%
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%	0.8%
Non-Metallic Mineral Product Manu	0.4	0.2%	0.4%
Seafood Processing	0.3	0.1%	0.2%
Basic Chemical & Chemical Product Manu	0.3	0.2%	0.6%
Telecomms, Internet & Library Services	0.3	0.8%	2.7%
Dairy Cattle Farming	0.3	0.5%	2.0%
Meat & Meat Product Manufacturing	0.2	0.2%	0.7%
Pulp & Paper Product Manufacturing	0.2	0.1%	0.3%
Insurance & Superannuation Funds	0.2	0.2%	0.9%
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%	0.4%
Dairy Product Manufacturing	0.0	0.0%	0.6%

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 2021



- Total employment in Dunedin City averaged 65,017 in the year to March 2021, down 1.5% from a year earlier. Employment in New Zealand increased by 0.1% 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.

14

Dunedin City Annual Economic Profile 2021

Figure 7: Annual average employment growth, 2001-2021

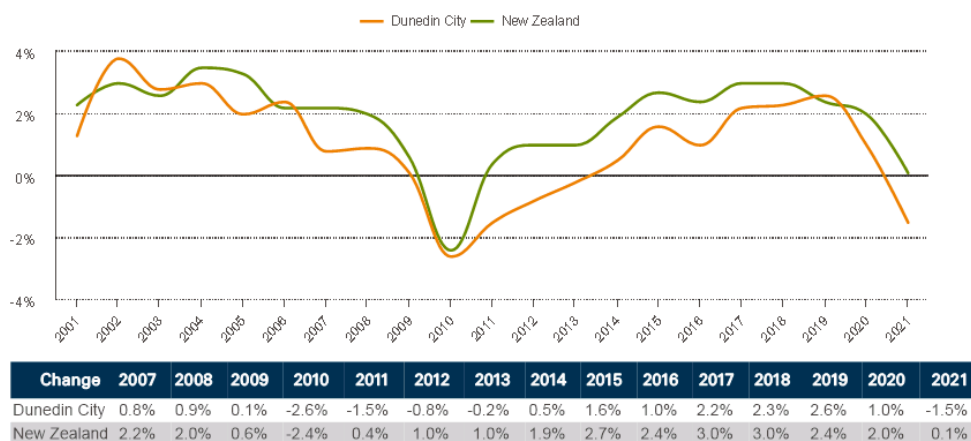
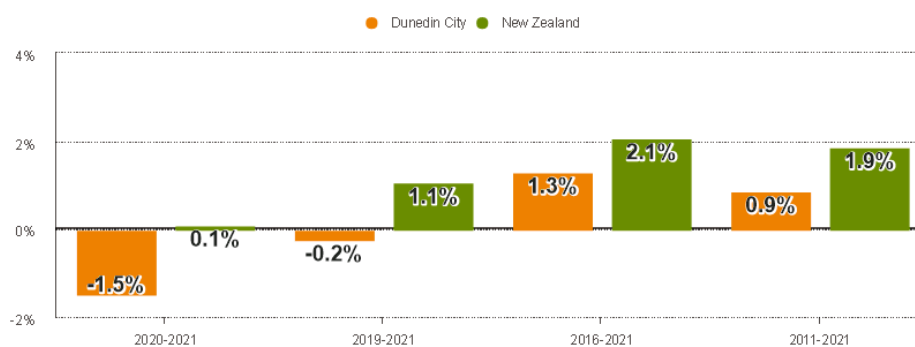


Figure 8: Employment growth over the last 1, 2, 5 & 10 years



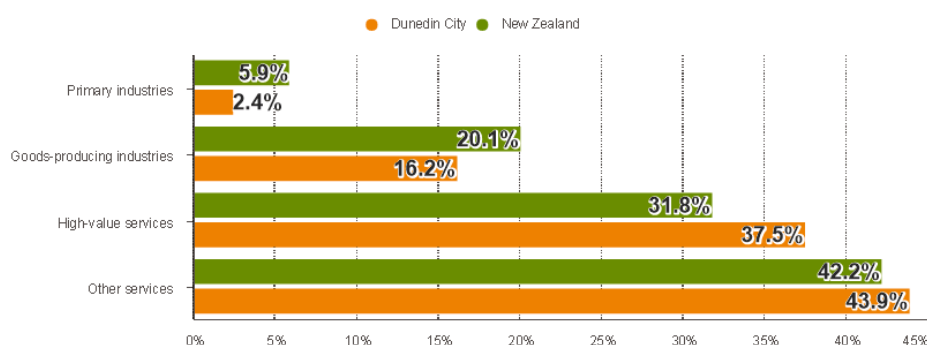
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Dunedin City Annual Economic Profile 2021

What is the industrial structure of employment in Dunedin City?

This section describes the structure of the labour market in terms of the broad sectors of primary industries, goods-producing industries, high-values services and other services. Primary industries make direct use of natural resources. They extract or harvest products from the earth. Goods-producing industries produce manufactured and other processed goods. High-value services include the higher value-adding, knowledge-based service industries. More detail of the sectors is given in the technical appendix.

Figure 9: Employment by broad sector, 2021



- Primary industries accounted for 2.4% in Dunedin City compared with 5.9% in New Zealand.
- Goods-producing industries accounted for 16.2% in Dunedin City compared with 20.1% in New Zealand.
- Other services industries accounted for the largest proportion of employment (43.9%) in Dunedin City, which is higher than in New Zealand (42.2%).
- High-value services accounted for 37.5% in Dunedin City compared with 31.8% 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, 2021

Industry	Dunedin City		New Zealand	
	Level	Share of total	Level	Share of total
Health Care and Social Assistance	10,127	15.6%	262,664	10.1%
Education and Training	9,023	13.9%	199,597	7.6%
Retail Trade	6,399	9.8%	230,256	8.8%
Construction	6,301	9.7%	264,339	10.1%
Accommodation and Food Services	4,844	7.4%	165,223	6.3%
Professional, Scientific and Technical Services	4,359	6.7%	252,284	9.7%
Manufacturing	3,746	5.8%	242,053	9.3%
Public Administration and Safety	3,430	5.3%	139,448	5.3%
Other Services	2,788	4.3%	101,262	3.9%
Transport, Postal and Warehousing	2,492	3.8%	103,968	4.0%
Administrative and Support Services	2,150	3.3%	130,569	5.0%
Wholesale Trade	2,121	3.3%	124,512	4.8%
Arts and Recreation Services	1,494	2.3%	47,872	1.8%
Agriculture, Forestry and Fishing	1,482	2.3%	148,313	5.7%
Rental, Hiring and Real Estate Services	1,389	2.1%	63,943	2.4%
Information Media and Telecommunications	1,208	1.9%	41,212	1.6%
Financial and Insurance Services	1,107	1.7%	70,182	2.7%
Electricity, Gas, Water and Waste Services	481	0.7%	19,188	0.7%
Mining	76	0.1%	5,818	0.2%
Total	65,017	100%	2,612,700	100%

- Among broad industries Health Care and Social Assistance was the largest in Dunedin City in 2021 accounting for 15.6% of total.
- The second largest was Education and Training (13.9%) followed by Retail Trade (9.8%)

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 2021 employing 4,645 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) (3,864) followed by cafes and restaurants (2,085).

Table 7: 50 largest employing ANZSIC 7-digit industries, 2021

Rank	Industry	Dunedin City		New Zealand
		Jobs	% of total	% of total
1	Higher Education	4,645	7.1%	1.4%
2	Hospitals (except Psychiatric Hospitals)	3,864	5.9%	3.0%
3	Cafes and Restaurants	2,085	3.2%	2.9%
4	Supermarket and Grocery Stores	2,083	3.2%	2.4%
5	Aged Care Residential Services	1,350	2.1%	1.4%
6	Other Social Assistance Services	1,320	2.0%	0.9%
7	Primary Education	1,305	2.0%	2.2%
8	Accommodation	1,271	2.0%	1.1%
9	House Construction	1,258	1.9%	2.1%
10	Central Government Administration	1,198	1.8%	1.8%
11	Technical and Vocational Education and Training	865	1.3%	0.4%
12	Secondary Education	847	1.3%	1.4%
13	Road Freight Transport	796	1.2%	1.3%
14	Road and Bridge Construction	783	1.2%	0.7%
15	Computer Systems Design and Related Services	750	1.2%	1.8%
16	Takeaway Food Services	744	1.1%	1.2%
17	Buildings Cleaning Services	743	1.1%	1.1%
18	Electrical Services	695	1.1%	0.9%
19	Preschool Education	657	1.0%	1.1%
20	Other Allied Health Services	653	1.0%	1.4%
21	Management Advice and Other Consulting Services	643	1.0%	1.7%
22	Newspaper Publishing	640	1.0%	0.1%
23	Investigation and Security Services	607	0.9%	0.5%
24	Local Government Administration	602	0.9%	0.9%
25	Accounting Services	578	0.9%	1.0%
26	Other Residential Care Services	577	0.9%	0.6%
27	Other Heavy and Civil Engineering Construction	566	0.9%	0.8%
28	Real Estate Services	555	0.9%	0.9%
29	Hardware and Building Supplies Retailing	545	0.8%	0.8%
30	Pubs, Taverns and Bars	538	0.8%	0.6%
31	Engineering Design and Engineering Consulting Services	515	0.8%	1.2%
32	Legal Services	506	0.8%	0.8%
33	Other Automotive Repair and Maintenance	503	0.8%	0.7%
34	Police Services	491	0.8%	0.6%
35	Hairdressing and Beauty Services	483	0.7%	0.7%
36	Department Stores	477	0.7%	0.6%
37	Plumbing Services	439	0.7%	0.6%
38	Other Interest Group Services n.e.c.	431	0.7%	0.5%
39	General Practice Medical Services	422	0.6%	0.6%
40	Car Retailing	410	0.6%	0.5%
41	Printing	406	0.6%	0.2%
42	Pathology and Diagnostic Imaging Services	356	0.5%	0.2%
43	Clothing Retailing	349	0.5%	0.6%
44	Painting and Decorating Services	348	0.5%	0.6%
45	Other Health Care Services n.e.c.	343	0.5%	0.3%
46	Child Care Services	340	0.5%	0.6%
47	Employment Placement and Recruitment Services	334	0.5%	0.7%
48	Banking	331	0.5%	1.0%
49	Pharmaceutical, Cosmetic and Toiletry Goods Retailing	329	0.5%	0.5%
50	Labour Supply Services	324	0.5%	1.2%
All other industries total		23,116	35.6%	48.7%
Total		65,017	100%	100%

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, 2020-2021

Industry	2020	2021	Change	Annual Growth
Construction	6,011	6,301	290	4.8%
Public Administration and Safety	3,293	3,430	137	4.2%
Health Care and Social Assistance	9,998	10,127	130	1.3%
Financial and Insurance Services	1,014	1,107	93	9.2%
Electricity, Gas, Water and Waste Services	433	481	49	11.2%
Rental, Hiring and Real Estate Services	1,347	1,389	42	3.1%
Agriculture, Forestry and Fishing	1,443	1,482	38	2.7%
Mining	75	76	2	2.3%
Other Services	2,823	2,788	-35	-1.2%
Information Media and Telecommunications	1,256	1,208	-48	-3.8%
Professional, Scientific and Technical Services	4,428	4,359	-69	-1.6%
Education and Training	9,107	9,023	-84	-0.9%
Arts and Recreation Services	1,645	1,494	-151	-9.2%
Manufacturing	3,915	3,746	-169	-4.3%
Wholesale Trade	2,315	2,121	-194	-8.4%
Transport, Postal and Warehousing	2,691	2,492	-199	-7.4%
Retail Trade	6,604	6,399	-204	-3.1%
Administrative and Support Services	2,367	2,150	-217	-9.2%
Accommodation and Food Services	5,220	4,844	-376	-7.2%
Total	65,983	65,017	-966	-1.5%

- Construction made the largest contribution to employment growth in Dunedin City between 2020 and 2021 with the industry adding 290 jobs.
- The next largest contributor was Public Administration and Safety (137 jobs) followed by Health Care and Social Assistance (130 jobs).
- The largest detractor from growth over the year was Accommodation and Food Services in which employment declined by 376.

The table on the next page shows the 20 industries (out of a total of approximately 500 industries of the ANZSIC 2006 industry classification¹) 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.

- Residential Building Construction was the largest creator of jobs in Dunedin City between 2020 and 2021, generating an additional 133 positions.
- This was followed by Hospitals, which added 106 jobs over the same period.
- Accommodation was the largest detractor of jobs in Dunedin City between 2020 and 2021, losing 168 positions.
- This was followed by Cafes, Restaurants and Takeaway Food Services, which lost 134 jobs over the same period.

Table 9: The 20 ANZSIC 4-digit industries that created the most jobs, 2020-2021

Rank	Industry	Jobs		Change 2020 - 2021	% of total 2021
		2020	2021		
1	Residential Building Construction	1,228	1,361	133	2.1%
2	Hospitals	3,840	3,945	106	6.1%
3	Building Installation Services	1,333	1,428	96	2.2%
4	Heavy and Civil Engineering Construction	1,267	1,349	82	2.1%
5	Domestic Appliance Manufacturing	5	85	80	0.1%
6	Central Government Administration	1,126	1,198	73	1.8%
7	Local Government Administration	546	602	56	0.9%
8	Auxiliary Finance and Investment Services	252	292	40	0.4%
9	Property Operators	451	491	40	0.8%
10	Auxiliary Insurance Services	198	231	34	0.4%
11	Computer Systems Design and Related Services	718	750	32	1.2%
12	Pathology and Diagnostic Imaging Services	332	356	24	0.5%
13	Hardware, Building and Garden Supplies Retailing	615	638	23	1.0%
14	Real Estate Services	532	555	23	0.9%
15	Depository Financial Intermediation	354	376	22	0.6%
16	Agriculture and Fishing Support Services	162	183	21	0.3%
17	Electricity Distribution	55	71	16	0.1%
18	Forestry and Logging	129	144	15	0.2%
19	Civic, Professional and Other Interest Group Services	500	516	15	0.8%
20	Other Professional, Scientific and Technical Services	95	110	15	0.2%
All other industries		52,249	50,336	-1,914	77.4%
Total		65,983	65,017	-966	100%

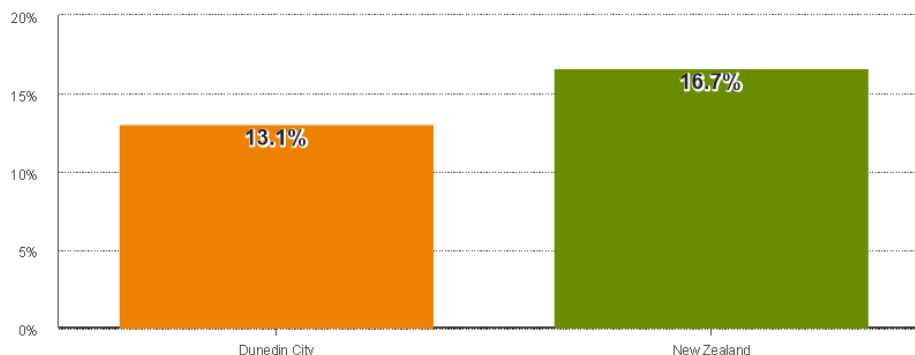
Table 10: The 20 ANZSIC 4-digit industries that lost the most jobs, 2020-2021

Rank	Industry	Jobs		Change 2020 - 2021	% of total 2021
		2020	2021		
1	Accommodation	1,439	1,271	-168	2.0%
2	Cafes, Restaurants and Takeaway Food Services	3,139	3,005	-134	4.6%
3	Employment Services	761	658	-103	1.0%
4	Tertiary Education	5,588	5,510	-79	8.5%
5	Architectural, Engineering and Technical Services	1,188	1,111	-77	1.7%
6	Scenic and Sightseeing Transport	138	64	-74	0.1%
7	Grocery, Liquor and Tobacco Product Wholesaling	621	557	-64	0.9%
8	Pubs, Taverns and Bars	601	538	-64	0.8%
9	Other Administrative Services	441	387	-54	0.6%
10	Newspaper, Periodical, Book and Directory Publishing	710	661	-49	1.0%
11	Clothing, Footwear and Personal Accessories Retailing	585	536	-49	0.8%
12	Other Personal Services	437	393	-44	0.6%
13	Legal and Accounting Services	1,126	1,084	-42	1.7%
14	Other Food Product Manufacturing	152	112	-40	0.2%
15	Water Transport Support Services	437	398	-38	0.6%
16	Motor Vehicle Retailing	484	446	-38	0.7%
17	Furniture, Floor Coverings and Other Goods Wholesaling	223	185	-38	0.3%
18	Electrical and Electronic Goods Retailing	255	219	-36	0.3%
19	Travel Agency Services	160	125	-35	0.2%
20	Museum Operation	299	264	-35	0.4%
All other industries		47,198	47,491	293	73.0%
Total		65,983	65,017	-966	100%

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

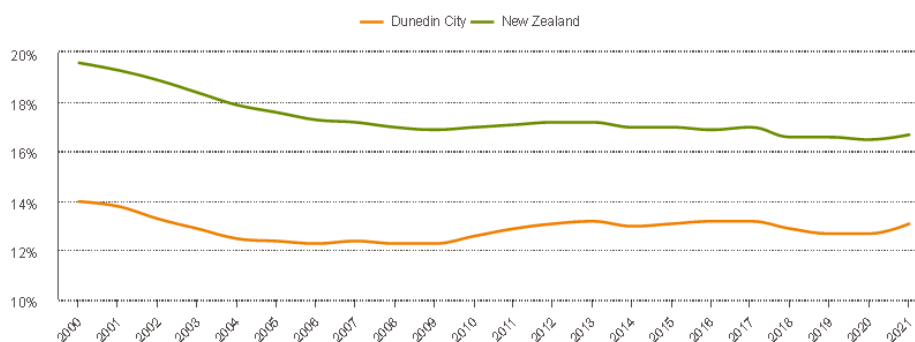
Self-employment makes up a sizeable proportion of total employment in New Zealand although it declined through the economic boom years and stabilised since the recession. This section contrasts self-employment in Dunedin City with the national economy.

Figure 10: Self employment rate, 2021



- Self-employed workers accounted for 13.1% of the workforce in Dunedin City in 2021, which was a lower rate than in the national economy (16.7%)
- A total of 8,534 workers were self-employed in Dunedin City in 2021.

Figure 11: Self employment rate, 2000-2021



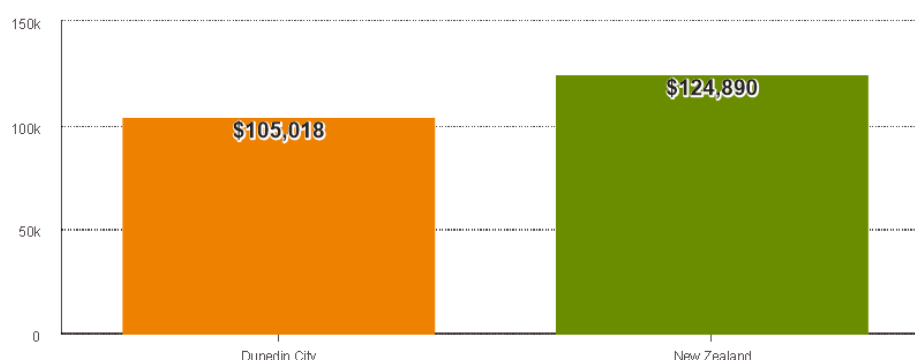
Level	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Dunedin City	12.4%	12.3%	12.3%	12.6%	12.9%	13.1%	13.2%	13.0%	13.1%	13.2%	13.2%	12.9%	12.7%	12.7%	13.1%
New Zealand	17.2%	17.0%	16.9%	17.0%	17.1%	17.2%	17.2%	17.0%	17.0%	16.9%	17.0%	16.6%	16.6%	16.5%	16.7%

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 2021 and previous years. Productivity is measured by GDP per employee (in constant 2021 prices).

Figure 12: Productivity, 2021

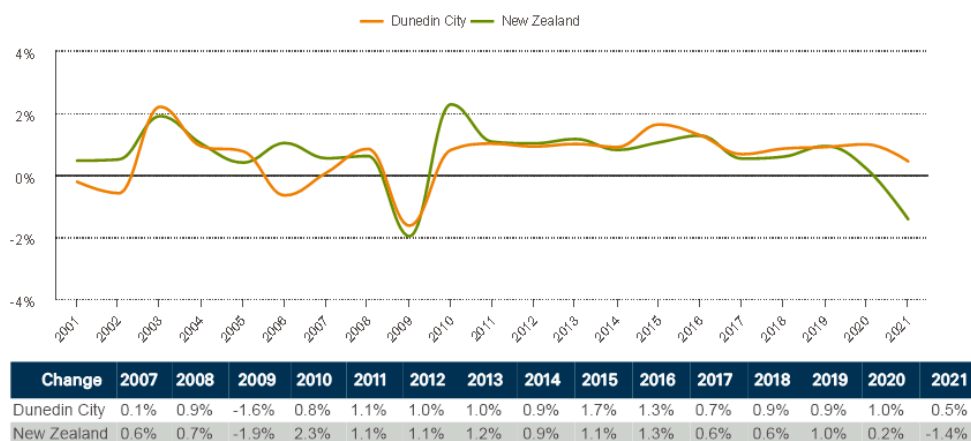


- GDP per employee in Dunedin City measured \$105,018 in the year to March 2021, which was 15.9% lower than in New Zealand.
- Productivity in Dunedin City increased by 0.5% from a year earlier compared with an decrease of 1.4% in New Zealand).
- Productivity growth in Dunedin City averaged 1.0%pa over the last ten years compared with an average of 0.7%pa in New Zealand.

22

Dunedin City Annual Economic Profile 2021

Figure 13: Productivity growth, 2001-2021



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, 2021

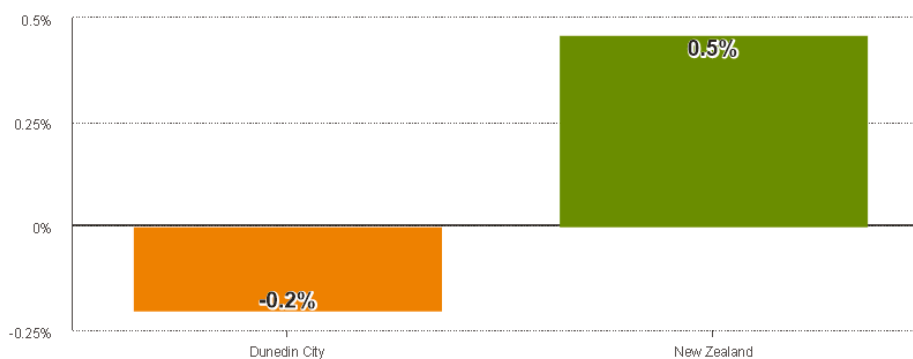
Industry	Productivity		Capital intensity
	Dunedin City	New Zealand	New Zealand
Electricity, Gas, Water and Waste Services	678,721	458,851	0.77
Mining	446,591	580,531	0.76
Rental, Hiring and Real Estate Services	268,759	337,663	0.82
Financial and Insurance Services	184,011	267,096	0.56
Information Media and Telecommunications	128,367	295,003	0.58
Agriculture, Forestry and Fishing	114,786	114,827	0.60
Transport, Postal and Warehousing	113,991	110,675	0.42
Professional, Scientific and Technical Services	107,271	114,072	0.23
Public Administration and Safety	96,311	111,653	0.20
Wholesale Trade	94,552	133,172	0.41
Construction	92,262	81,631	0.26
Manufacturing	80,639	124,965	0.43
Health Care and Social Assistance	69,318	76,971	0.12
Retail Trade	66,606	74,285	0.32
Education and Training	65,958	58,771	0.26
Arts and Recreation Services	61,090	83,219	0.36
Accommodation and Food Services	43,866	38,765	0.25
Administrative and Support Services	42,782	42,716	0.20
Other Services	41,682	55,446	0.19
Total	105,018	124,890	

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 2021

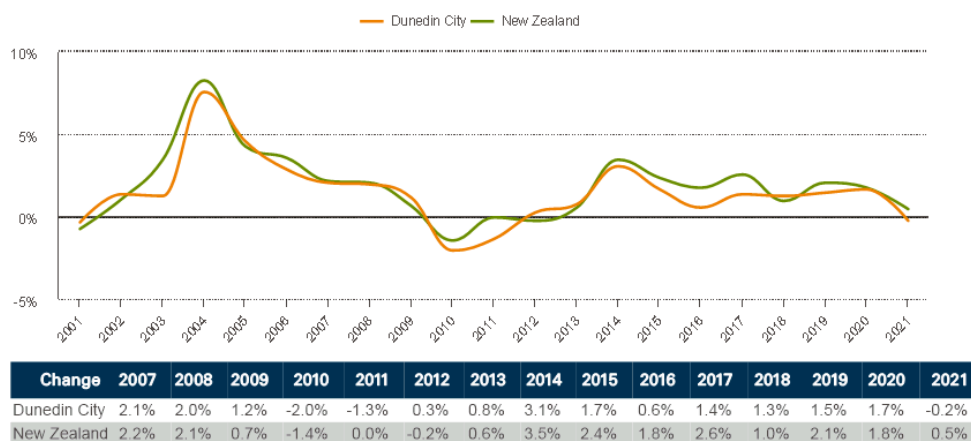


- A total of 12,099 business units were recorded in Dunedin City in 2021, down 0.2% from a year earlier.
- The number of business units in New Zealand increased by 0.5% over the same period.
- Growth in the number of business units in Dunedin City averaged 1.2%pa over the past 10 years compared with 1.6%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.

25

Dunedin City Annual Economic Profile 2021

Figure 15: Annual average business unit growth, 2001-2021

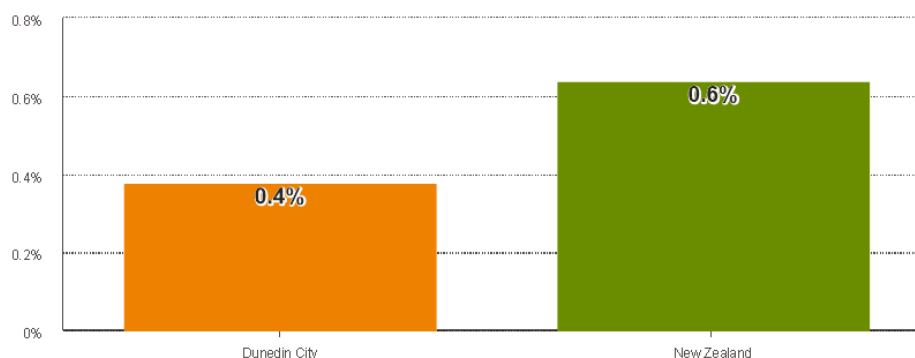


POPULATION GROWTH

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 2021



- Dunedin City's population was 133,300 in 2021, up 0.4% from a year earlier. New Zealand's total population grew by 0.6% over the same period.
- Population growth in Dunedin City averaged 0.8%pa over the last 5 years compared with 1.7%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.

27 **Dunedin City Annual Economic Profile 2021**

Figure 17: Annual population growth, 1997-2021

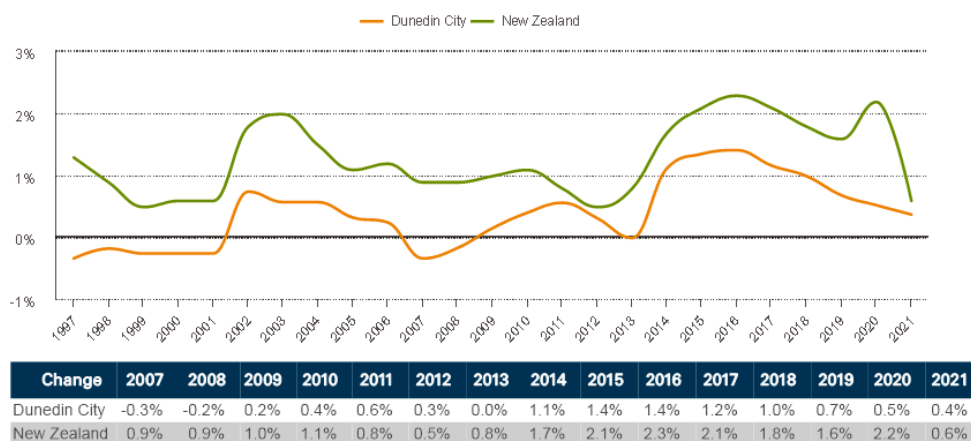
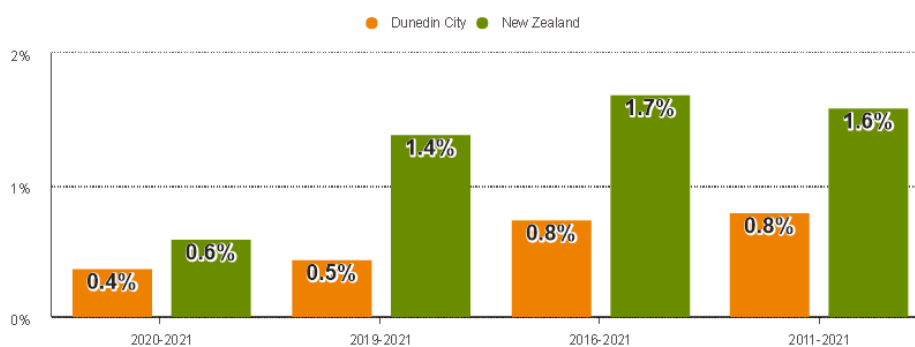


Figure 18: Population growth over the last 1, 2, 5, and 10 years

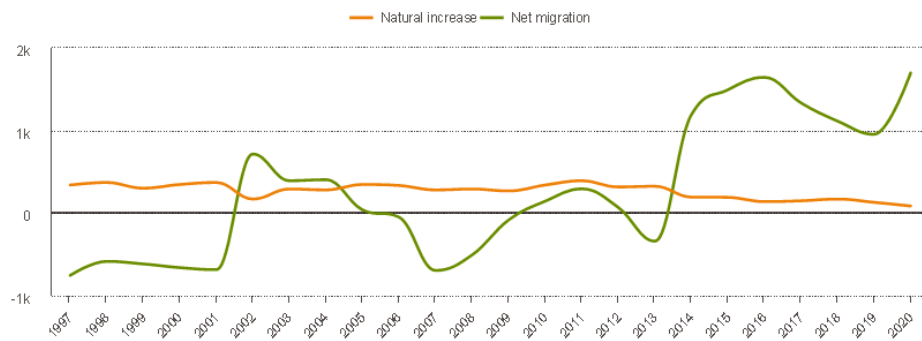


What is the source of Dunedin City's population growth?

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.

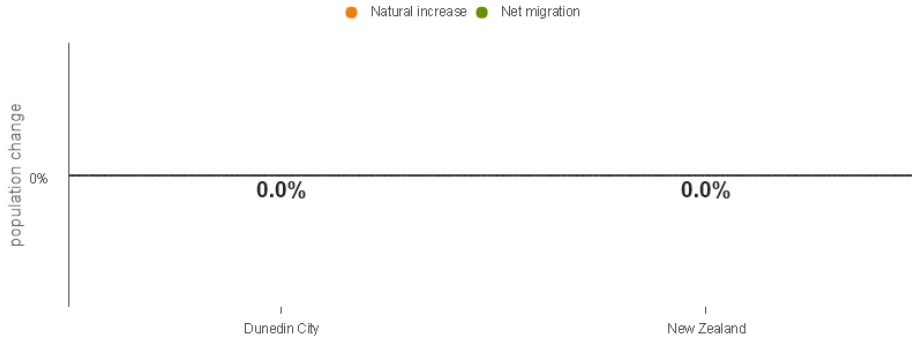
- Dunedin City's population increased by 500 people in the year to June 2021. This net increase was made up of net migration of 0 and natural decrease of 0.

Figure 19: Population source of Dunedin City, 1997-2021



- The relative contribution of net migration to natural growth in Dunedin City was lower than New Zealand in 2021.

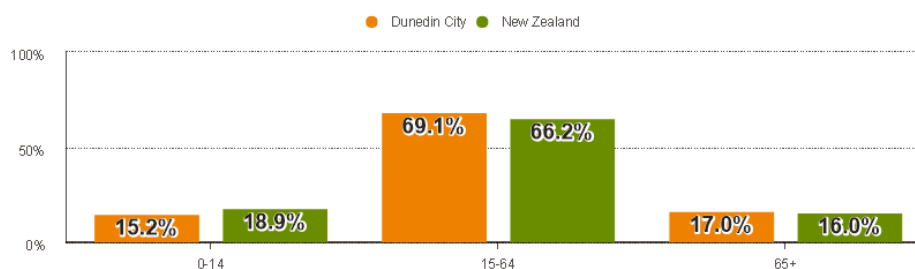
Figure 20: Sources of population growth, 2021



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

- In 2021, 69.1% of Dunedin City's population was of working age (15-64). This was significantly higher than the proportion of the national population (66.2%).
- Dunedin City had a slightly lower proportion (15.2%) of young people (0-14) than the country as a whole (18.9%) and a significantly higher proportion (17.0%) of people 65 years and older compared with New Zealand (16.0%).
- Overall the dependency ratio in Dunedin City (44.8%) was lower than in the national economy (51.1%). 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 2021



STANDARD OF LIVING

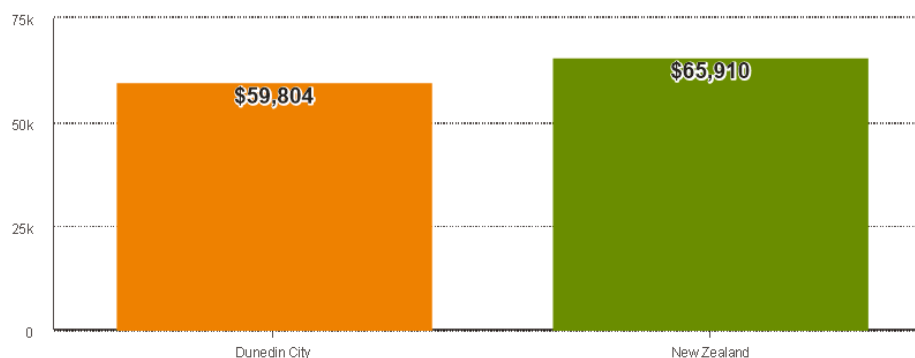
This section describes a few indicators of economic standard of living. It investigates average earnings, house prices and housing affordability.

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, 2021

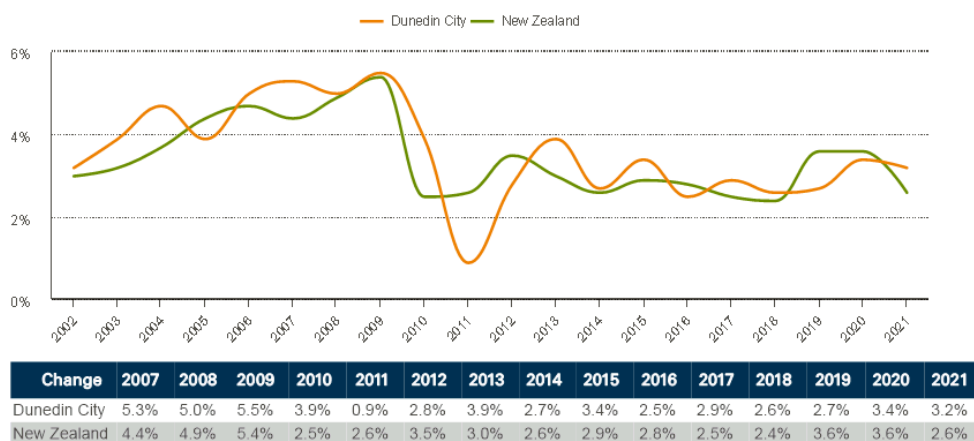


- Mean annual earnings in Dunedin City was \$59,804 in the year to March 2021, which was lower than the New Zealand mean of \$65,910.
- Mean earnings in Dunedin City increased by 3.2% over the year to March 2021 compared with an increase of 2.6% in New Zealand.
- Over the last ten years earnings growth in Dunedin City reached a maximum of 5.5% in 2009 and a minimum of 0.9% in 2011.

31

Dunedin City Annual Economic Profile 2021

Figure 23: Annual earnings growth, 2002-2021

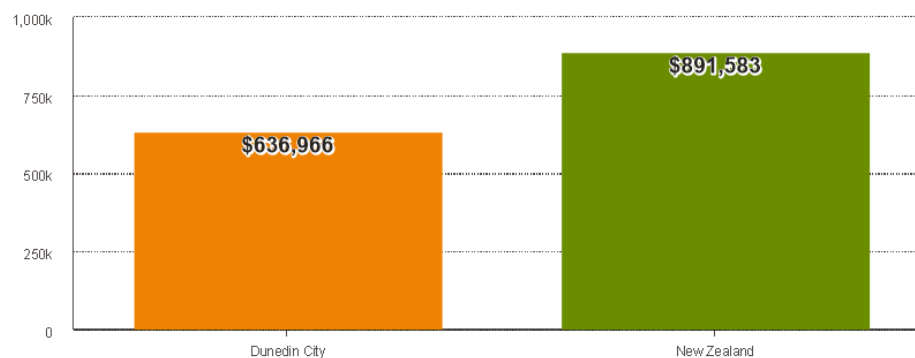


- Mean annual earnings in Dunedin City was \$59,804 in the year to March 2021, which was lower than the New Zealand mean of \$65,910.
- Mean earnings in Dunedin City increased by 3.2% over the year to March 2021 compared with an increase of 2.6% in New Zealand.
- Over the last ten years earnings growth 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?

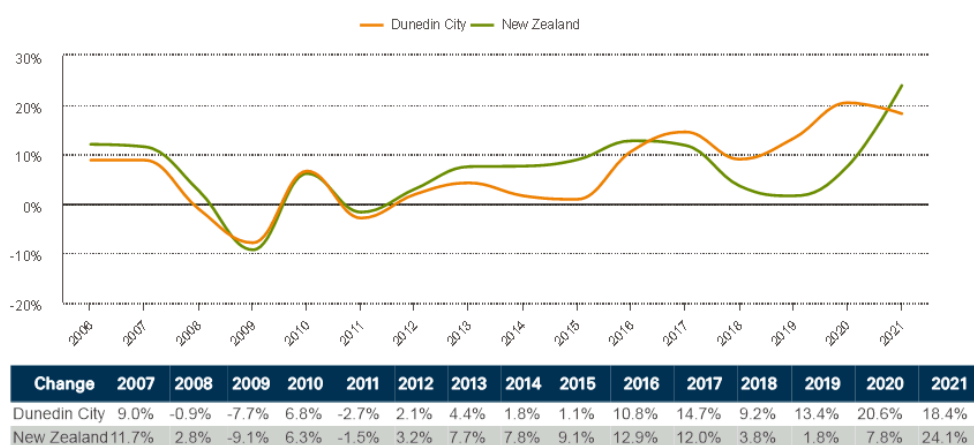
The cost of housing is a major component of household spending. This section describes the cost of housing in Dunedin City relative to the rest of the country.

Figure 24: Average current house value, 2021



- The Average current house value in Dunedin City was \$636,966 in 2021, which was lower than the New Zealand median of \$891,583.
- House price growth in Dunedin City was 18.4% for the year to March 2021. Growth was weaker than in New Zealand (24.1%).

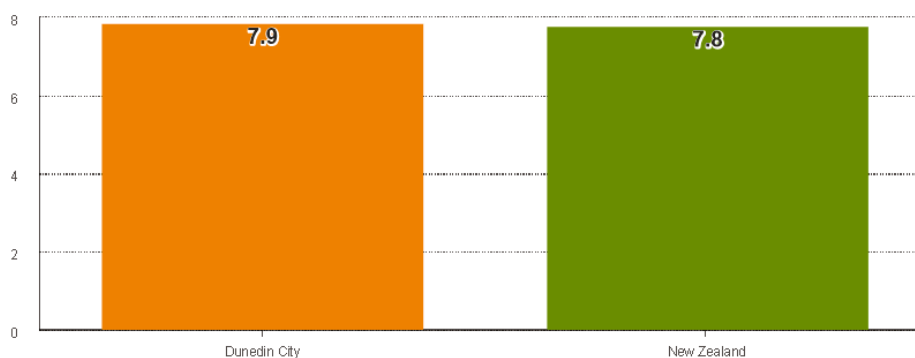
Figure 25: Annual Average current house value growth, 2006-2021



How affordable is housing in Dunedin City?

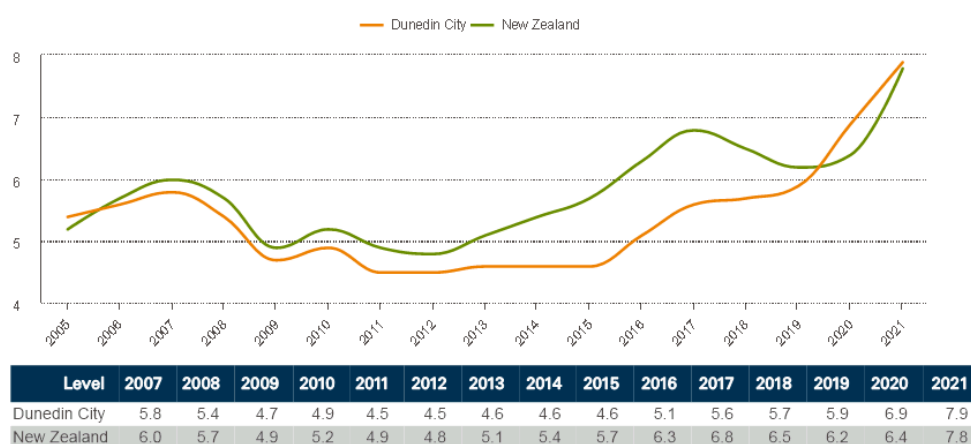
This section investigates the affordability of housing by comparing average current house values with average earnings. We have estimated a housing affordability index which is the ratio of the average current house value to annual average earnings measured in the Linked Employer Employee Data. A higher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

Figure 26: Housing affordability index, 2021



- The housing affordability index in Dunedin City was 7.9 in the year to March 2021, which was higher than New Zealand's index of 7.8. This means that housing is less affordable in Dunedin City than in New Zealand.

Figure 27: Housing affordability, 2005-2021



WORKFORCE AND SKILLS

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

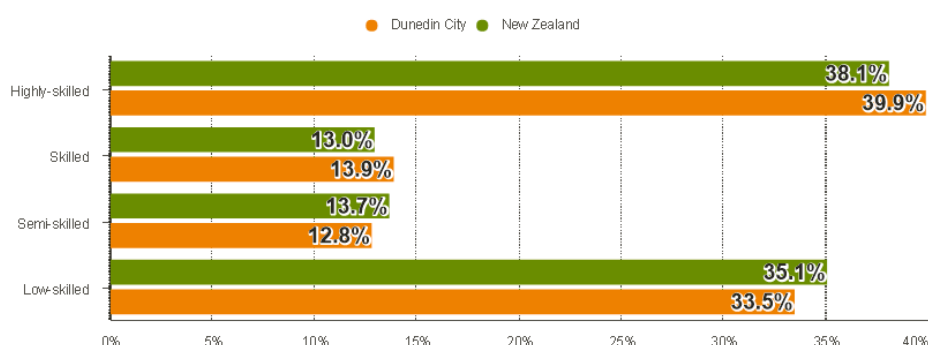
A region that can offer high skilled jobs can generally offer a higher standard of living to its residents. It is also has a better chance of retaining its residents and attracting new skills. This section contrasts the skill levels required by jobs in Dunedin City with those required in the national 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, 2021

Skill level	Dunedin City		New Zealand	
	Jobs	% of total	Jobs	% of total
Highly-skilled	25,930	39.9%	996,628	38.1%
Skilled	9,008	13.9%	340,170	13.0%
Semi-skilled	8,295	12.8%	357,739	13.7%
Low-skilled	21,784	33.5%	918,163	35.1%
Total	65,017	100%	2,612,700	100%

- Approximately 39.9% of Dunedin City's workforce was employed in highly skilled occupations in 2021. This is higher than in New Zealand (38.1%).
- Approximately 33.5% of Dunedin City's workforce was employed in low-skilled occupations in 2021. This is lower than in New Zealand 35.1%.

Figure 28: Employment by broad skill level, 2021



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 (28.7%) in Dunedin City, which is higher than New Zealand (24.5%).
- 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, 2021

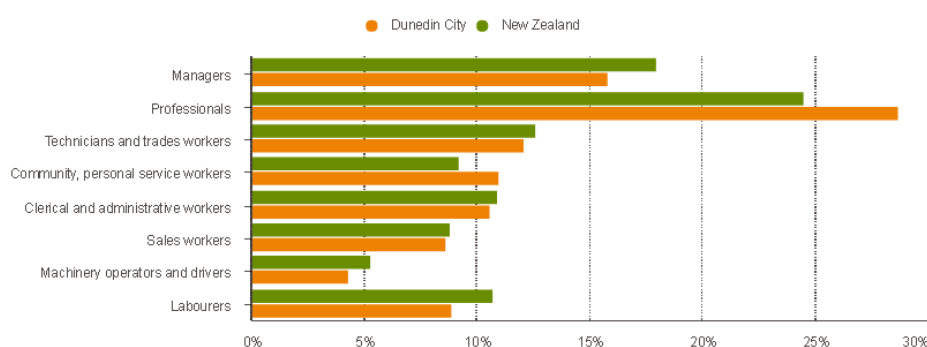


Table 13 shows a ranking of employment by 2-digit occupations.

- Education Professionals is the largest 2-digit occupation in Dunedin City, accounting for 8.2% 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 (7.7%) and health professionals (6.4%).

Table 13: Employment by ANZSIC 2-digit occupation, 2021

Occupation	Dunedin City		New Zealand	
	Employment	% of total	Employment	% of total
Education Professionals	5,349	8.2%	150,560	5.8%
Specialist Managers	5,010	7.7%	218,782	8.4%
Health Professionals	4,161	6.4%	111,200	4.3%
Business, HR & Marketing Professionals	3,255	5.0%	140,704	5.4%
Sales Assistants & Salespersons	3,157	4.9%	123,248	4.7%
Carers & Aides	2,781	4.3%	88,965	3.4%
Hospitality, Retail & Service Managers	2,504	3.9%	93,433	3.6%
Chief Execs, General Managers, Legislators	2,032	3.1%	90,847	3.5%
Legal, Social & Welfare Professionals	1,969	3.0%	60,031	2.3%
Design, Engineering, Science Professionals	1,956	3.0%	91,036	3.5%
Office Managers & Program Administrators	1,729	2.7%	68,183	2.6%
Sales Representatives & Agents	1,677	2.6%	78,823	3.0%
Other Labourers	1,662	2.6%	69,606	2.7%
Construction Trades Workers	1,565	2.4%	68,004	2.6%
Cleaners & Laundry Workers	1,556	2.4%	55,327	2.1%
Automotive & Engineering Trades Workers	1,418	2.2%	64,308	2.5%
Hospitality Workers	1,371	2.1%	49,266	1.9%
Road & Rail Drivers	1,305	2.0%	54,751	2.1%
Engineering, ICT & Science Technicians	1,293	2.0%	51,671	2.0%
ICT Professionals	1,280	2.0%	63,965	2.4%
General Clerical Workers	1,253	1.9%	48,454	1.9%
Food Trades Workers	1,127	1.7%	43,742	1.7%
Protective Service Workers	1,066	1.6%	35,385	1.4%
Sports & Personal Service Workers	1,045	1.6%	40,815	1.6%
Inquiry Clerks & Receptionists	1,023	1.6%	35,844	1.4%
Other Technicians & Trades Workers	1,016	1.6%	39,944	1.5%
Other Clerical & Administrative Workers	992	1.5%	45,059	1.7%
Numerical Clerks	925	1.4%	46,823	1.8%
Health & Welfare Support Workers	862	1.3%	26,843	1.0%
Electrotech & Telecoms Trades Workers	862	1.3%	33,277	1.3%
Sales Support Workers	785	1.2%	28,492	1.1%
Farm, Forestry & Garden Workers	732	1.1%	55,966	2.1%
Farmers & Farm Managers	697	1.1%	66,622	2.5%
Arts & Media Professionals	693	1.1%	23,725	0.9%
Factory Process Workers	677	1.0%	49,974	1.9%
Machine & Stationary Plant Operators	644	1.0%	34,680	1.3%
Construction & Mining Labourers	622	1.0%	28,821	1.1%
Skilled Animal & Horticultural Workers	591	0.9%	27,535	1.1%
Personal Assistants & Secretaries	574	0.9%	21,677	0.8%
Food Preparation Assistants	555	0.9%	20,242	0.8%
Mobile Plant Operators	429	0.7%	24,166	0.9%
Storepersons	426	0.7%	23,595	0.9%
Clerical & Office Support Workers	388	0.6%	18,305	0.7%
Total employment	65,017	100%	2,612,700	100%

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.

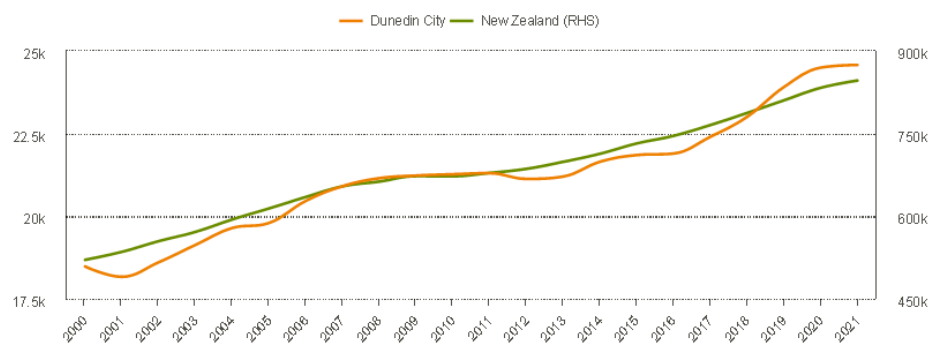
This section describes employment in knowledge intensive industries in Dunedin City.

Table 14: Employment in knowledge intensive industries, 2021

	Employment in KI industries 2021	KI employment as share of total employment 2021	Annual growth in KI employment 2021	Annual average growth in KI employment 2011-2021
Dunedin City	24,605	37.8%	0.3%	1.4%
New Zealand	848,044	32.5%	1.6%	2.2%

- During 2021, there were 24,605 jobs in Dunedin City's knowledge intensive industries. At 37.8% of total employment, this was higher than in New Zealand (32.5%).
- During the year to March 2021, growth in employment in knowledge intensive industries was 0.3%, compared with a change of 1.6% in New Zealand.

Figure 30: Employment in knowledge intensive industries, 2000-2021



What are the top knowledge intensive industries in Dunedin City?

Table 15: Top 30 knowledge intensive industries in Dunedin City, 2021

Rank	Industry	Dunedin City		New Zealand	
		Employment	% of total employment	Employment	% of total employment
1	Higher Education	4,645	7.1%	35,451	1.4%
2	Hospitals (except Psychiatric Hospitals)	3,864	5.9%	78,971	3.0%
3	Primary Education	1,305	2.0%	56,607	2.2%
4	Central Government Administration	1,198	1.8%	47,039	1.8%
5	Technical and Vocational Education and Training	865	1.3%	9,785	0.4%
6	Secondary Education	847	1.3%	36,224	1.4%
7	Computer Systems Design and Related Services	750	1.2%	47,488	1.8%
8	Other Allied Health Services	653	1.0%	37,115	1.4%
9	Management Advice and Other Consulting Services	643	1.0%	43,541	1.7%
10	Local Government Administration	602	0.9%	24,809	0.9%
11	Accounting Services	578	0.9%	25,460	1.0%
12	Engineering Design and Engineering Consulting Services	515	0.8%	31,602	1.2%
13	Legal Services	506	0.8%	20,099	0.8%
14	Other Interest Group Services n.e.c.	431	0.7%	14,344	0.5%
15	General Practice Medical Services	422	0.6%	16,702	0.6%
16	Pathology and Diagnostic Imaging Services	356	0.5%	5,103	0.2%
17	Other Health Care Services n.e.c.	343	0.5%	8,791	0.3%
18	Employment Placement and Recruitment Services	334	0.5%	19,021	0.7%
19	Pharmaceutical, Cosmetic and Toiletry Goods Retailing	329	0.5%	11,855	0.5%
20	Dental Services	278	0.4%	8,222	0.3%
21	Museum Operation	264	0.4%	2,951	0.1%
22	Religious Services	249	0.4%	9,885	0.4%
23	Corporate Head Office Management Services	246	0.4%	25,190	1.0%
24	Adult, Community and Other Education n.e.c.	234	0.4%	11,810	0.5%
25	Specialist Medical Services	227	0.3%	6,069	0.2%
26	Combined Primary and Secondary Education	218	0.3%	6,203	0.2%
27	Architectural Services	210	0.3%	10,552	0.4%
28	Physiotherapy Services	189	0.3%	4,984	0.2%
29	Scientific Research Services	185	0.3%	8,723	0.3%
30	Other Auxiliary Finance and Investment Services	177	0.3%	11,489	0.4%

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, 2021

Field of study	Certificate (level 1-3)	Certificate (level 4)	Diploma (level 5-6)	Degree (level 7+)	Total
Number					
Natural and Physical Sciences	958	196	511	1,637	3,301
Information Technology	903	100	253	931	2,187
Engineering and Related Technologies	3,772	3,173	1,209	2,445	10,599
Architecture and Building	1,305	2,327	436	701	4,769
Agriculture, Environmental and Related Studies	1,060	527	180	412	2,179
Health	1,961	426	794	4,787	7,969
Education	1,264	192	358	3,248	5,063
Management and Commerce	4,978	961	1,837	4,273	12,049
Society and Culture	3,225	664	1,206	4,183	9,278
Creative Arts	1,594	370	397	1,471	3,832
Food, Hospitality and Personal Services	1,869	1,245	418	258	3,791
Totals	22,887	10,182	7,601	24,346	65,017
% of total					
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	5.8%	4.9%	1.9%	3.8%	16.3%
Architecture and Building	2.0%	3.6%	0.7%	1.1%	7.3%
Agriculture, Environmental and Related Studies	1.6%	0.8%	0.3%	0.6%	3.4%
Health	3.0%	0.7%	1.2%	7.4%	12.3%
Education	1.9%	0.3%	0.6%	5.0%	7.8%
Management and Commerce	7.7%	1.5%	2.8%	6.6%	18.5%
Society and Culture	5.0%	1.0%	1.9%	6.4%	14.3%
Creative Arts	2.5%	0.6%	0.6%	2.3%	5.9%
Food, Hospitality and Personal Services	2.9%	1.9%	0.6%	0.4%	5.8%
Totals	35.2%	15.7%	11.7%	37.4%	100%

- The greatest demand in Dunedin City in 2021 was for qualifications at the level of Degree (level 7+). Approximately 37.4% of all positions in Dunedin City required this level of qualification.
- By field of study, the highest demand was for Management and Commerce. Approximately 18.5% 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, 2011-2021

Field of study	Certificate (level 1-3)	Certificate (level 4)	Diploma (level 5-6)	Degree (level 7+)	Total
Absolute change					
Natural and Physical Sciences	-21	11	43	217	250
Information Technology	-25	6	27	229	237
Engineering and Related Technologies	110	326	101	366	902
Architecture and Building	87	472	88	105	752
Agriculture, Environmental and Related Studies	1	23	24	51	100
Health	21	37	107	1,005	1,169
Education	2	4	57	317	380
Management and Commerce	-224	21	255	497	549
Society and Culture	-13	27	210	441	666
Creative Arts	-59	12	44	186	183
Food, Hospitality and Personal Services	-26	153	41	27	195
Totals	-147	1,091	996	3,441	5,382
annual average % change					
Natural and Physical Sciences	-0.2%	0.6%	0.9%	1.4%	0.8%
Information Technology	-0.3%	0.6%	1.1%	2.9%	1.2%
Engineering and Related Technologies	0.3%	1.1%	0.9%	1.6%	0.9%
Architecture and Building	0.7%	2.3%	2.3%	1.6%	1.7%
Agriculture, Environmental and Related Studies	0.0%	0.4%	1.4%	1.3%	0.5%
Health	0.1%	0.9%	1.5%	2.4%	1.6%
Education	0.0%	0.2%	1.8%	1.0%	0.8%
Management and Commerce	-0.4%	0.2%	1.5%	1.2%	0.5%
Society and Culture	0.0%	0.4%	1.9%	1.1%	0.7%
Creative Arts	-0.4%	0.3%	1.2%	1.4%	0.5%
Food, Hospitality and Personal Services	-0.1%	1.3%	1.0%	1.1%	0.5%
Totals	-0.1%	1.1%	1.4%	1.5%	100%

- The number of positions in Dunedin City requiring a Degree (level 7+) increased by 3,441 between 2011 and 2021, 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 2011 and 2021. The number of positions requiring this field of study increased by 1,169 over the 10 year period.

TOURISM

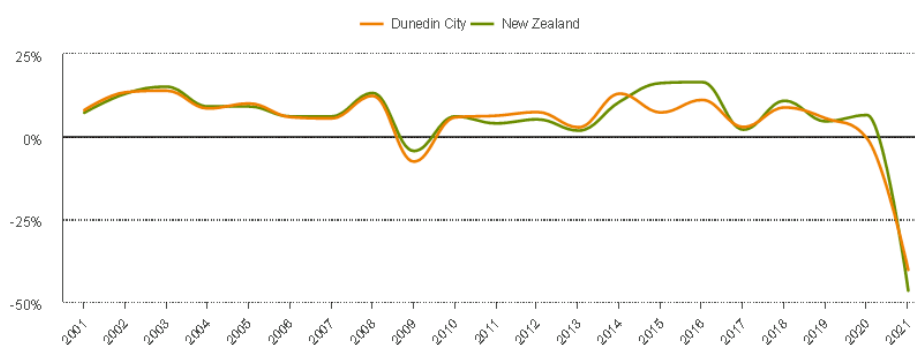
Tourism has grown rapidly in New Zealand since 2000. Not only has the number of overseas tourist arrivals increased substantially, but the level of domestic tourism has also expanded rapidly as spending on leisure by New Zealand residents increased. This section describes the contribution of tourism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

Tourism GDP

Table 18: Tourism GDP, 2001-2021

Year	Dunedin City		New Zealand	
	Level	Change	Level	Change
2000	\$101m		\$3,343m	
2001	\$109m	8.3%	\$3,595m	7.5%
2002	\$124m	13.7%	\$4,074m	13.3%
2003	\$142m	14.2%	\$4,700m	15.4%
2004	\$154m	8.8%	\$5,141m	9.4%
2005	\$170m	10.3%	\$5,626m	9.4%
2006	\$181m	6.2%	\$5,985m	6.4%
2007	\$191m	5.8%	\$6,368m	6.4%
2008	\$215m	12.6%	\$7,227m	13.5%
2009	\$200m	-7.3%	\$6,932m	-4.1%
2010	\$212m	6.1%	\$7,379m	6.4%
2011	\$226m	6.6%	\$7,698m	4.3%
2012	\$243m	7.7%	\$8,120m	5.5%
2013	\$250m	3.1%	\$8,289m	2.1%
2014	\$284m	13.3%	\$9,191m	10.9%
2015	\$305m	7.6%	\$10,710m	16.5%
2016	\$340m	11.4%	\$12,508m	16.8%
2017	\$351m	3.2%	\$12,809m	2.4%
2018	\$383m	9.1%	\$14,235m	11.1%
2019	\$405m	5.8%	\$14,937m	4.9%
2020	\$403m	-0.3%	\$15,948m	6.8%
2021	\$241m	-40.1%	\$8,547m	-46.4%

Figure 31: Annual average tourism GDP growth, 2001-2021



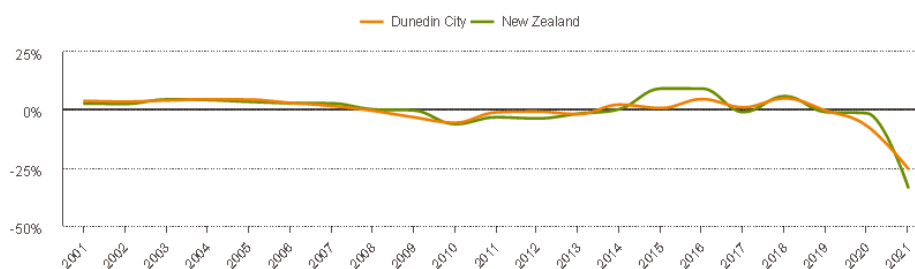
- The tourism industry contributed \$241m towards GDP in Dunedin City in 2021. This amounted to 3.5% of the Dunedin City's economic output in 2021, down from 4.0% ten years ago.
- Economic output in Dunedin City's tourism industry declined by -40.1% in 2021, compared with a -46.4% decline in New Zealand.
- Growth in the industry in Dunedin City has averaged 0.7% over the last ten years, compared with 1.1% in New Zealand.

Tourism Employment

Table 19: Tourism employment, 2001-2021

Year	Dunedin City		New Zealand	
	Level	Change	Level	Change
2000	4,501		152,610	
2001	4,693	4.2%	157,389	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%	190,890	3.3%
2007	5,919	2.1%	197,028	3.2%
2008	5,920	0.0%	198,219	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%	175,866	-3.3%
2013	5,320	-1.5%	173,721	-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	5,887	1.5%	208,923	-0.6%
2018	6,203	5.4%	222,129	6.3%
2019	6,209	0.1%	220,875	-0.6%
2020	5,801	-6.6%	218,580	-1.0%
2021	4,349	-25.0%	146,295	-33.1%

Figure 32: Annual average tourism employment growth, 2001-2021



- The tourism industry employed an average of 4,349 people in Dunedin City in 2021. This amounted to 6.7% of the Dunedin City's total employment in 2021, down from 9.1% in 2011.
- Employment growth in the industry in Dunedin City has averaged -2.2% over the last ten years, compared with -2.2% in New Zealand.
- Employment in the tourism industry declined by -25.0% in 2021, compared with a -33.1% decline in New Zealand.

TECHNICAL NOTES

Time period

This economic profile reports on March years (eg 2021 refers to the 12 months to March 2021) 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 four and five 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).

44 **Dunedin City Annual Economic Profile 2021**

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 2021 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 2021 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 2021 **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.

ITEMS FOR CONSIDERATION BY THE CHAIR

Any items for consideration by the Chair