

Gore District
Growth Study Phase 1
**SOCIAL AND ECONOMIC
BACKGROUND REPORT**

Prepared for
Gore District Council

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1. Introduction

1.1 Background

A number of significant industrial developments are likely in and around Gore District in the next 10-15 years. The largest developments are based on the extensive lignite reserves, and include a briquette plant, a urea plant and a lignite-to-diesel plant. However, there are also other very substantial developments, including the McNab dairy factory, the Kaiwera Downs wind farm, and a major Transpower electricity network upgrade. The town of Gore and township of Mataura are likely to be the main hub for much of the construction activity for these developments and for their long term operation, and significant growth is expected in the resident population and district economy. Historically, Gore's main role is a service town for the surrounding farming economy and community, which has itself seen change over the last decade as traditional sheep and beef farming is being replaced by dairy farming.

Any of these industrial developments individually could mean significant changes for the Gore District economy and communities. The prospect of several major industrial projects all occurring within a relatively short time frame suggests far-reaching changes for Gore District, including substantial increases in resident population attracted by the new job opportunities, and corresponding growth in commercial activity (especially retail, household services and leisure) as well as health, education, and other household services, and community activity. Growth pressures are anticipated in housing and services especially, as the Gore urban area has limited land available for residential, commercial and industrial development, and there is already low-density expansion of the urban fringe to the west.

The likely large scale and speed of change will require a well-planned and well co-ordinated response, from both the public and private sectors, to ensure that positive effects are maximized, and negative effects are avoided as far as possible.

With this in mind, the Gore District Council (GDC) has initiated the Gore Growth Study (GGS).

1.2 Aim and Objectives

The general aim of the GGS is:

"To identify, and provide a framework to understand and manage, the effects arising from the construction and on-going operation of major primary and secondary industrial activities locating in the Gore District within the foreseeable future.

Core objectives are:

- a. Collation of baseline material that describes the current (2011) state, capacity and

significance of the social, cultural, economic and physical environment (including landscape, ecology, infrastructure and transportation networks) of the district and surrounding areas within which effects can reasonably be expected to occur.

- b. Where practical, to establish reliable statistical models to enable assessment of the effects of various scenarios, including those arising from possible developments and different spatial options for population growth arising from those developments.*
- c. Identification of deficiencies in the existing physical and social infrastructure (roading, water, sewage, electricity, telecommunication, health services, education facilities etc) provided within the district and consideration as to how those deficiencies can be rectified.*
- d. Providing input in future work streams and actions to be undertaken, including a Growth Strategy for the district and changes to the Council's Long Term Community Plan and District Plan.*

Within the wider GGS, a number of work streams have been identified to meet the objectives above. GDC has commissioned Market Economics (M.E) and Taylor Baines & Associates Ltd (TBA) to jointly carry out the Social and Economic Work Stream.

The specific objectives of phase one of the Social and Economic Work Stream are to:

- 1. Define the demographic, economic and social spatial structure of the district within its appropriate regional and national context.*
- 2. Consult with appropriate stakeholders to verify the validity and reliability of the developed information set.*
- 3. Develop and verify the appropriate spatial interaction models, and an overall Economic Futures Model for Gore District, so that they are ready for the input of development scenarios and spatial growth options (phase two).*

1.3 Approach and Report Outline

The approach of the Economic and Social Work Stream was to provide a comprehensive planning and analysis structure on a GIS platform, which will contain:

- the current (2010/2011¹) situation for Gore District, with baseline economic, social, cultural and physical information (**Objective 1 and 2**);
- the key spatial and other inter-relationships *within* Gore District, to show how the economy and community functions (**Objective 3**). These models will provide a basis for assessing likely effects of different expansion and development options to accommodate growth. Some of these models will have a strong spatial component; for other aspects community-wide assessment is appropriate;

¹ Due to the Christchurch earthquakes the 2011 Census has been postponed. As such, the most current demographic data is from the 2006 Census of Population and Dwellings.

- the situation in surrounding areas - Southland Region, Southland District and Invercargill City – though in lesser detail (**Objective 1**). This will also show Gore’s spatial and other inter-relationships with these surrounding areas (**Objective 3**);

We have applied a “nested” approach which places Gore District within the wider regional context, and will allow assessment at varying levels of resolution - to examine and compare specific areas *within* Gore, and Gore District *within* the Southland Region (and Southern South Island if necessary). This is important because the effects of growth will not all be manifest within Gore District itself. Some will flow more widely across the region - and indeed key aspects of strategies for growth management will relate to how much of the growth would be accommodated within the District.

The deliverables of the approach are two core databases (in Excel format) supported by related GIS files. The first database is called the **Gore District Spatial Framework Database**. The Spatial Framework (defined in GIS) provides a means of dividing the district into meaningful spatial units, broadly linked with the existing District Plan land use zones, but with some modifications to accommodate potential future land use changes. These units are referred to as precincts or neighbourhoods. They allow base year demographic, economic and property data (contained in the database) to be summarised at a level that avoids unnecessary complexity while still allowing district wide patterns to be shown. Underlying the precincts/neighbourhoods are finer level spatial units (Census Area Units (CAUs) and meshblocks) which can also be analysed if required. This will be helpful for the specific location of growth activities in future work. The Spatial Framework Database is described in Section 2 of this report.

The second database is called the **Gore District Social Services Database**. This comprises an Excel database of current (2011) social and education services, and heritage and recreation sites and facilities. The associated GIS files locate each service/site, where possible, and they can be displayed according to a range of categorisations contained in the database. They can be mapped in relation to the Spatial Framework by combining (layering) the GIS files. The Social Services Database is described in Section 3 of this report.

Other outputs of the approach are two core spatial models; the **Gore District Retail Supply and Demand Model** and the **Gore District Economic Futures Model**. The base year results of these models are described in this report in Sections 4 and 5 respectively. Both models will play a greater role in phase 2 research when growth scenarios are tested.

Section 6 of this report describes the ‘next steps’ and future capabilities of the Economic and Social Work Stream, including potential compatibility with the Gore Transport Model².

² Developed for the GGS by Gabites Porter.

2. The Spatial Framework Database

A Spatial Framework has been developed in order to meaningfully evaluate the characteristics of different parts of the Gore District and the patterns of current (and future) economic, demographic and property activity. This Spatial Framework allows for both a detailed and summary geographic assessment. All meshblocks within Southland and Otago Regions have been included in the Spatial Framework so that an understanding of how Gore District sits within the wider region and southern South Island can be interpreted. This section of the report discusses how the Spatial Framework was built and how property, demographic and economic data has been applied to create the Spatial Framework Database.

2.1 Datasets Used

The Spatial Framework has been built using the following geographic definitions and datasets:

- **Statistics New Zealand Census Area Units.** CAUs are loosely equivalent to suburbs and consist of a group of meshblocks (defined below). They are non-administrative areas which are larger than meshblocks and smaller than territorial authorities. Each CAU is given a unique code and name by Statistics New Zealand.
- **Statistics New Zealand Meshblocks.** Meshblocks are the smallest geographic area for which Statistics New Zealand collects data. In urban areas they can be the size of a city block but in rural areas they are much larger. Statistics New Zealand has divided the country into these small spatial areas and each area has been given a unique meshblock number.
- **Gore District Council Land Use Zones.** GDC has provided M.E with maps of the land use zones currently contained in its District Plan. These zones are categorised as Commercial, Industrial, Residential and Rural and are shown in Appendix 1.

2.2 Developing the Spatial Framework

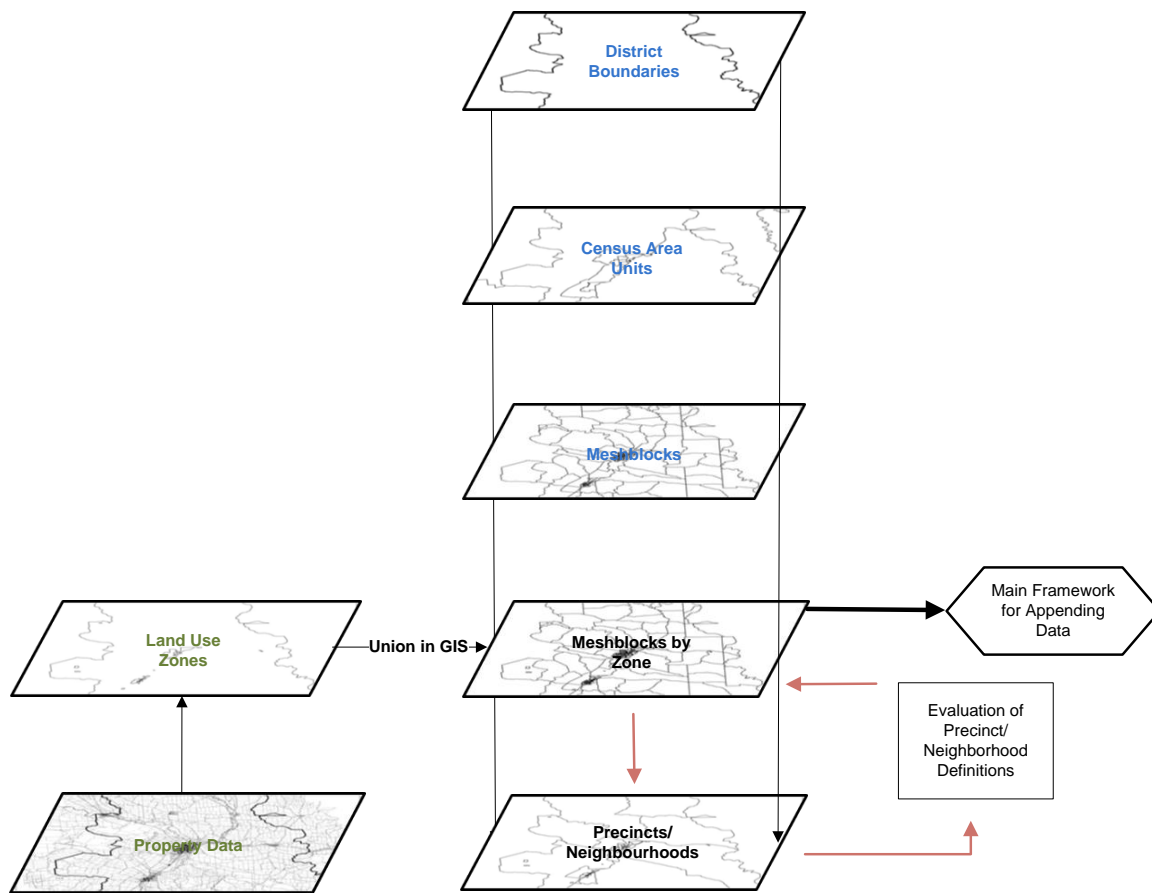
For areas outside of Gore District (that is, the rest of the southern South Island or Study Area), Statistics New Zealand's 2006 Meshblock definitions are used for spatial and data analysis in the Spatial Framework (finest level). Within Gore District the Spatial Framework allows for a slightly more detailed and pragmatic understanding of where activity takes place. Figure 2.1 shows a schematic of how the Spatial Framework was developed for Gore District.

Using the Meshblock definitions for Gore District and the Land Use Zones a 'union' was carried out in a GIS program to cookie-cut the two layers by splitting some meshblocks by the land use zones contained within them. For example if a meshblock contained both rural and residential zoning the meshblock would be divided into these two spatial areas (2 polygons). This modified or cut meshblock layer is referred to as meshblock-zone areas. Each meshblock-zone area was given a unique code reflecting the land use zone and the meshblock number of the area.

The meshblock-zone areas were then aggregated to define interim **precincts/neighbourhoods** based

on their location and the type of activity occurring each area. Initially these precincts/ neighbourhoods were governed by the current land use zones and were given functional names. Feedback from GDC has led to a revision of some precinct definitions, to better capture the characteristics of some land areas, to better distinguish current activity from vacant land areas, and to ensure that likely future growth nodes are captured in single precincts rather than split. In this revision, there have been some instances where the definition of precincts departs from the initial method of keeping the precincts as subdivisions of single land use types. In other words, there are some precincts in the final Spatial Framework that contain more than one land use zone as currently defined in the District Plan. The naming of the final precincts/neighbourhoods was also revised by GDC to give more local meaning to the Spatial Framework.

FIGURE 2.1: DEVELOPING THE SPATIAL FRAMEWORK FOR GORE DISTRICT



Data Sources Legend
 Gore District Council
 Statistics New Zealand
 m.e Spatial

The outcome of this process is a Spatial Framework that, in table form, includes 4,350 unique spatial units (rows) across the whole Study Area (finest level), with 357 of those within Gore District. They in turn can be aggregated (categorised) according to a number of spatial levels including urban/rural (Statistics NZ), original current land use zones (4), precinct type (4) CAUs (9), rural/Gore Town &

Environs/Mataura Town and Environs (3) and precinct/neighbourhood (56). Maps showing the final precincts/neighbourhoods are included in Appendix 1.

The method used for appending property, demographic and economic data to the Spatial Framework to create a database is discussed below.

2.3 Property Data and the Spatial Framework

GDC provided M.E with information about properties in the district (property and rating files). This information included spatial definitions of the property boundaries and locations as well as information about the nature of improvements and land and capital values.

To allow for analysis and the summary of property data at the precinct/neighbourhood (or other) level, each property was coded to a Meshblock-Zone (and subsequently aggregated to the precinct level). In cases where a property was in more than one Meshblock-Zone, a function in the GIS programme was used to calculate the land area in each Meshblock-Zone and the property was allocated to the Meshblock-Zone which had the greatest share of the property's land.

The Property information, in particular details about improvements, was also used in allocating the demographic data to the Spatial Framework.

2.4 Demographic Data and the Spatial Framework

Statistics New Zealand's Census data for the years 1996, 2001 and 2006 is used to understand the recent history and current demographics of Gore District and the surrounding Study Area. The variables include information about individuals, such as their age, the ethnic groups they identify with, their occupation and their income. Data collected about households includes information on the ownership of the dwelling, number of occupants and level of household income.

Most of Statistics New Zealand's Census data is released at the meshblock level. However if there is a small number of people or households in a meshblock or demographic group Statistics New Zealand suppresses the data to protect confidentiality. If data has been suppressed, then estimates have been calculated by applying the proportion of people/households in each demographic category in the CAU (where there is no suppression) to the total number of people/households in the meshblock.

As an additional measure to protect respondent confidentiality, Statistics New Zealand uses Random Rounding to base 3. For each of the datasets all counts of zero and multiples of three are left unchanged and other values are rounded either up or down to one of the nearest multiples of three. The probability of a value being rounded up or down is done so that the long run expected value is the same as the original value. The example given on the Statistics New Zealand website is that if there is a value of 17 it is rounded to 15 with a probability of 1/3 and to 18 with a probability of 2/3 so that the expected value is 17 as $15 \cdot \frac{1}{3} + 18 \cdot \frac{2}{3} = 17$. Statistics New Zealand considers that the

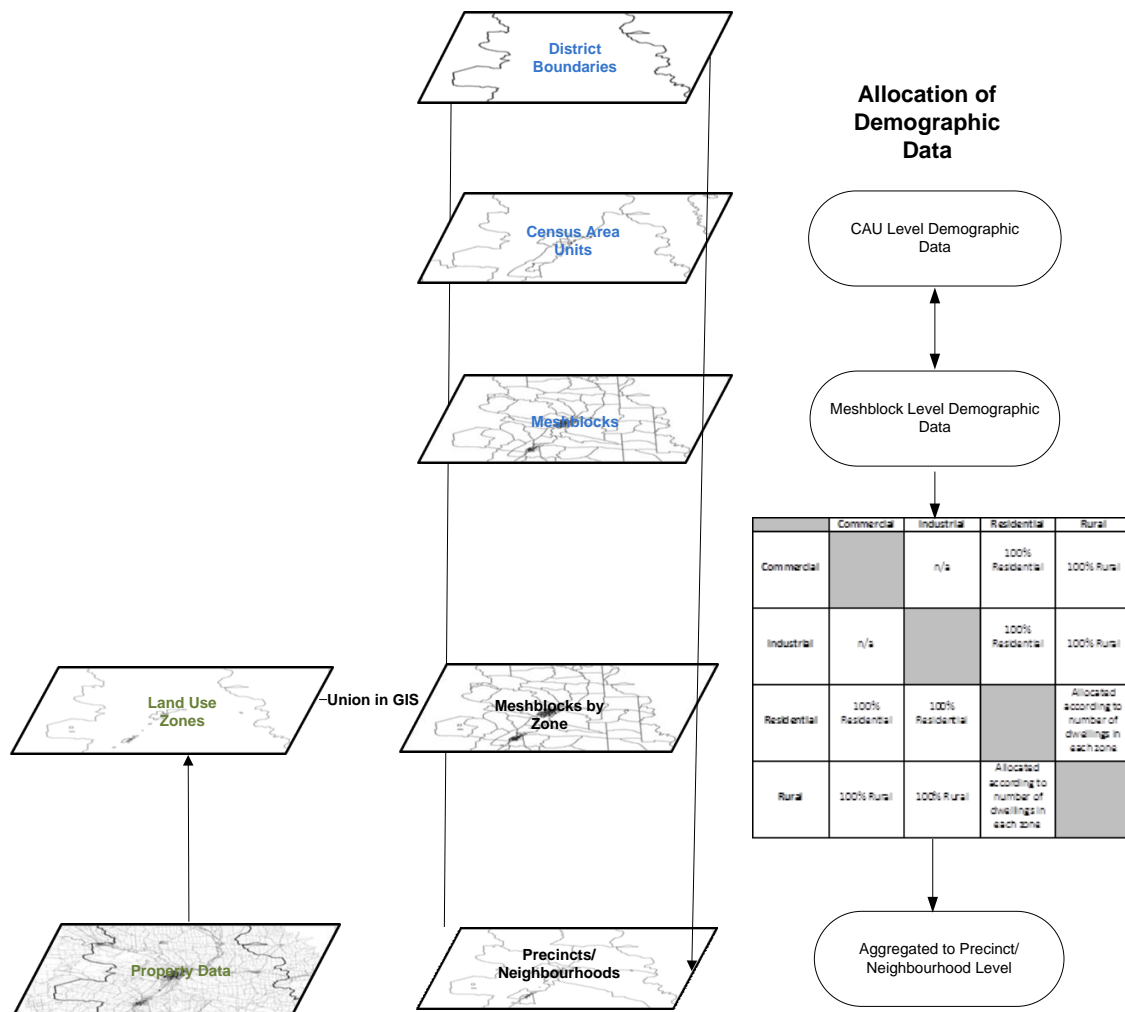
impact of this process on the accuracy of the data will be insignificant.³

The method used in allocating the meshblock based demographic data to the Spatial Framework is shown in Figure 2.2. For areas outside Gore District, the Spatial Framework is analysed at meshblock level and the data has been appended directly to the appropriate meshblock code. Within the Gore District the Spatial Framework is based on Meshblock-Zones. In order to apply the demographic data to the Spatial Framework the following rules were applied:

- If the meshblock was not split between zones then it was assumed that all activity occurs in the set meshblock, regardless of zone.
- If a meshblock was split between a residential or rural zone and an industrial or commercial zone it was assumed (for simplicity) that all (100%) of household/population based activities occur in the rural or residential zone and nothing occurs in the industrial or commercial zone.
- If a meshblock was split between a residential and rural zone then the Property information provided by GDC was used to split the household/population based activity between these areas based on the proportion (%) of dwelling units in each Meshblock–Zone area. Dwelling units were derived from the ‘improvement’ descriptions for each property.
- There were no cases where a meshblock was only split between a Commercial and Industrial Zone. In all cases where a meshblock was split between a Commercial and Industrial Zone it was also split by a Rural and/or Residential Zone and demographic data was allocated to these areas in accordance with the priority rules above.

³ http://www.stats.govt.nz/browse_for_stats/people_and_communities/geographic-areas/urban-rural-profile/standards.aspx

FIGURE 2.2: APPENDING GORE DISTRICT DEMOGRAPHIC DATA TO THE SPATIAL FRAMEWORK



Data Sources Legend

Gore District Council
 Statistics New Zealand
 m.e Spatial

2.5 Economic Data and the Spatial Framework

The Spatial Framework has utilised information from the Statistics New Zealand Business Frame to understand the current (2011 and recent historical) economic structure of Gore District and its precincts. This dataset includes information about the Meshblock location of a firm, the predominant type of activity performed⁴ and employment levels.

In the Business Frame, employment is measured in Employee Counts. This is a measure of all salary and wage earners and does not include working proprietors who take drawings from their businesses. Thus Employee Counts are an undercount of true employment. M.E has developed a

⁴ Defined according to the Australia New Zealand Standard Industrial Classifications (ANZSIC 2006).

measure of employment – Modified Employment Counts (MECs) which include estimates of working proprietors to give a more comprehensive measure of employment. More detail about MECs is provided in Appendix 2.

The Business Frame is released by Statistics New Zealand at meshblock level and needed to be allocated to the Meshblock-Zone areas which make up the Spatial Framework within Gore District. The following rules and considerations were taken into account in carrying out this allocation:

- If a meshblock was not split between two or more zones, activity was allocated to that meshblock regardless of zone.
- If a meshblock was split between one or more zones, activity was allocated based on the activity type and the most appropriate zone for it. For example, agricultural activity was allocated to the rural zone.
- The size of meshblock-zone areas was also taken into consideration. Cross checks were run using aerial photos (Google Earth).

This approach is based on common sense, but may not be 100% accurate in allocating activity across the limited number of split meshblocks. No account has been made of whether the business entity was accurately located to a meshblock in the first instance. Overall however, the rules and considerations applied by M.E can be replicated in the future and this ensures that current and future comparisons will be consistent.

2.6 Summary of Demographic, Economic and Property Patterns

It is not the intention of this report to provide detailed interpretation of the current patterns of demographic, economic and property patterns. Rather, M.E has developed the Spatial Framework Database as a tool that will allow GDC to analyse specific precincts/neighbourhoods in detail and also compare precincts/neighbourhoods across the district. Similarly, the associated GIS files will allow GDC to create their own maps. The focus of future work (phase two growth scenarios) will be on interpreting the demographic, economic and property changes associated with different growth futures and what the implications are for GDC and the Gore District community.

Table 2.1 does however provide some examples of the current (albeit limited to 2006 Census) demographic patterns across the district, sourced from the Spatial Framework Database. As expected, there is very little population and household activity located in Commercial and Industrial precincts. Residential precincts account for 73% of the usually resident population and the rural precincts account for 23% (2006). The precinct/neighbourhood containing the greatest share of people is South West Gore Residential 1 with 9% or 1,130 residents. In saying that, it is the biggest of the precincts (spatially) and contains 504 separate property units.

Overall, 67% of the district's under 15 year olds are located in the residential precincts/neighbourhoods (20% of the total residential precinct's population) and 28% are located in the rural precincts/neighbourhoods (26% of the total rural precinct's population). As such, youth are under-represented in the residential areas and over represented in the rural areas relative to the district average and the total population. Conversely, the 65+ age group is over-represented in the

TABLE 2.1: SELECT SUMMARY DEMOGRAPHIC VARIABLES BY GORE DISTRICT PRECINCT/NEIGHBOURHOOD

<i>Precinct/Neighbourhood</i>	2006 Census, Usually Resident Population Count	Precinct Share of District	2006 Census UR Pop 0-15 years	Precinct Share of District	2006 Census Population 65 Years and Over	Precinct Share of District	2006 Census Māori Ethnic Group	Precinct Share of District	2006 Census Unemployed	Precinct Share of District	2006 Census, Total Households in Private Occupied Dwellings	Precinct Share of District	2006 Census Household Income \$20,000 or Less	Precinct Share of District	2006 Census Household Income \$100,001 or More	Precinct Share of District	2006 Census Do Not Own Usual Residence	Precinct Share of District
COMMERCIAL PRECINCTS SUB-TOTAL	3	0%	0	0%	1	0%	0	0%	0	0%	-	0%	0	0%	0	0%	0	0%
INDUSTRIAL PRECINCTS SUB-TOTAL	480	4%	128	5%	53	3%	36	3%	12	4%	174	4%	20	2%	16	4%	37	3%
Central South West Gore Residential	585	5%	69	3%	251	12%	32	3%	16	6%	276	6%	100	11%	9	2%	70	6%
Central West Gore Residential	651	5%	96	4%	234	11%	33	3%	11	4%	312	6%	74	8%	20	5%	91	7%
North Gore Residential	684	6%	107	4%	148	7%	30	3%	7	3%	285	6%	27	3%	46	12%	44	4%
Central North Gore Residential	315	3%	56	2%	83	4%	33	3%	7	3%	156	3%	59	7%	2	0%	72	6%
East Gore Residential 1	385	3%	94	4%	63	3%	37	3%	13	5%	158	3%	40	4%	8	2%	41	3%
East Gore Residential 2	849	7%	177	7%	106	5%	95	9%	25	9%	343	7%	70	8%	15	4%	107	9%
Wentworth Heights	104	1%	17	1%	13	1%	9	1%	4	1%	39	1%	5	1%	2	1%	8	1%
North West Gore Residential	627	5%	123	5%	117	6%	48	4%	7	3%	264	5%	68	8%	13	3%	63	5%
South East Gore Residential	415	3%	90	3%	50	2%	64	6%	4	1%	170	4%	28	3%	4	1%	50	4%
South West Gore Residential 1	1,130	9%	247	9%	188	9%	93	9%	41	14%	460	10%	95	11%	14	3%	138	11%
South West Gore Residential 2	732	6%	146	6%	155	8%	15	1%	15	5%	285	6%	30	3%	38	10%	37	3%
West Gore Residential 1	327	3%	84	3%	50	2%	21	2%	12	4%	141	3%	36	4%	3	1%	40	3%
West Gore Residential 2	607	5%	125	5%	74	4%	37	3%	7	3%	220	5%	27	3%	27	7%	40	3%
North East Gore Rural 1	49	0%	8	0%	13	1%	3	0%	1	0%	19	0%	4	0%	3	1%	5	0%
South East Maitara Residential	236	2%	55	2%	32	2%	64	6%	5	2%	101	2%	17	2%	4	1%	29	2%
North East Maitara Residential	288	2%	78	3%	34	2%	61	6%	14	5%	113	2%	15	2%	2	1%	30	2%
North West Maitara Residential	263	2%	60	2%	43	2%	80	7%	14	5%	116	2%	26	3%	5	1%	26	2%
South West Maitara Residential	579	5%	124	5%	93	5%	151	14%	23	8%	260	5%	62	7%	10	2%	77	6%
RESIDENTIAL PRECINCTS SUB-TOTAL	8,826	73%	1,757	67%	1,749	85%	905	85%	228	79%	3,719	77%	784	88%	225	58%	967	79%
South Gore Rural	11	0%	3	0%	1	0%	1	0%	-	0%	4	0%	-	0%	0	0%	1	0%
West Gore Rural	137	1%	16	1%	54	3%	4	0%	1	0%	36	1%	3	0%	7	2%	4	0%
Kaiwera South	261	2%	86	3%	14	1%	18	2%	11	4%	78	2%	6	1%	11	3%	27	2%
East Maitara Rural	126	1%	36	1%	8	0%	9	1%	0	0%	40	1%	5	1%	1	0%	9	1%
Kaiwera North	281	2%	84	3%	22	1%	11	1%	5	2%	102	2%	8	1%	12	3%	25	2%
Benio	324	3%	106	4%	30	1%	16	1%	0	0%	108	2%	8	1%	17	4%	38	3%
Merino Downs / Greenvale	351	3%	95	4%	26	1%	11	1%	5	2%	117	2%	10	1%	19	5%	25	2%
Wendon / Otama	495	4%	117	4%	27	1%	15	1%	8	3%	171	4%	23	3%	39	10%	34	3%
Dolamore / Stoney Creek	137	1%	29	1%	20	1%	8	1%	5	2%	46	1%	1	0%	12	3%	3	0%
Waimumu	404	3%	108	4%	25	1%	15	1%	4	1%	137	3%	15	2%	24	6%	30	2%
North Gore Rural 2	124	1%	25	1%	13	1%	7	1%	2	1%	44	1%	8	1%	4	1%	19	2%
West Maitara Rural	60	0%	14	1%	8	0%	11	1%	2	1%	23	0%	3	0%	1	0%	5	0%
Waikaka	96	1%	23	1%	12	1%	5	0%	3	1%	36	1%	1	0%	2	1%	6	1%
RURAL PRECINCTS SUB-TOTAL	2,806	23%	741	28%	259	13%	129	12%	48	17%	943	19%	92	10%	150	38%	226	18%
TOTAL GORE DISTRICT	12,114	100%	2,626	100%	2,062	100%	1,070	100%	288	100%	4,836	100%	896	100%	391	100%	1,231	100%

residential (urban) areas (85% located in residential precincts) and under-represented in the rural areas (13% located in rural precincts). This is an expected trend; as people age they tend to move closer to social and medical service providers and also into smaller, lower maintenance properties. The 65+ age group is particularly concentrated in the Central South West Gore Residential and Central West Gore Residential precincts with 12% and 11% of the total respectively. These same precincts are under-represented by young children, suggesting a retirement living characteristic.

Maori residents are concentrated in the residential (urban) precincts/neighbourhoods (85% of the district total) and under-represented in the rural communities (12%). A total of 33% of the total district Maori population resides in the Maitua residential precincts – representing a greater share of the total population in these locations than elsewhere. In 2006, 79% of the unemployed reside in residential precincts and 17% in rural precincts. While the South West Gore Residential 1 precinct accounts for 9% of the population, it accounts for 14% of the unemployed.

The residential precincts/neighbourhoods combined account for 77% of the district's households, compared to 73% of the resident population. The rural precincts account for 19% of households (compared to 23% of the population). This shows that household size is greater in rural precincts (2.98 members per household on average compared to 2.37 on average in residential precincts). This is consistent with the 'older' population in the urban areas, which means more one and two person households.

Low household incomes (less than \$20,000) are more likely to be found in residential precincts (88% of low income households are located in these precincts) and high income households (\$100,000 or more) are more likely to be found in rural precincts (38% of high income household are located in rural precincts). High income households are over-represented (relative to total households) in the North Gore Residential neighbourhood, the South West Gore Residential 2 neighbourhood and the Wendon / Otama rural area with 12%, 10% and 10% of the district total respectively. These same neighbourhoods show low shares of renting households.

2.7 Deliverables

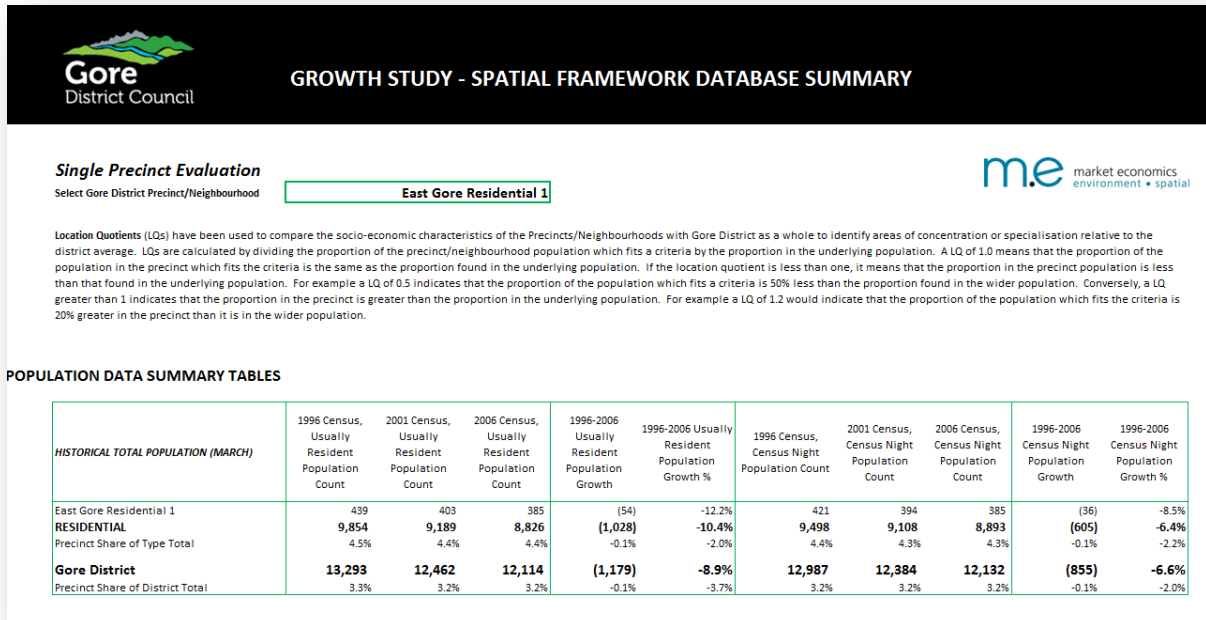
A copy of the Gore District Spatial Framework Database, described above, is provided to GDC along with this report. This is an Excel file and contains the detailed demographic (split into population and household data), economic and property datasets organised according to the Spatial Framework. The detailed data tables are also replicated in associated GIS files (also provided to GDC) which will allow Council to generate maps of any specific variable.

The Spatial Framework Database includes two control panels which contain a set of pre-formatted summary tables, which allow for easy analysis and interpretation of the database at the precinct/neighbourhood level.

One control panel – Single Precinct Evaluation – allows the user to select an individual precinct/neighbourhood and view (and copy) summary tables covering population, household, employment, business count and property variables. These tables compare the results for the selected precinct against the total for the precinct type (i.e., total residential precincts) and the total for the district. In some tables, location quotients are included to highlight when a precinct exhibits a particular


concentration or characteristic. Figure 2.3 provides an image of the single precinct control panel and the first of the summary tables included. The precinct is selected by a drop down box in the green cell at the top of the control panel.

FIGURE 2.3: IMAGE OF SINGLE PRECINCT EVALUATION CONTROL PANEL




The other control panel – Multi Precinct Evaluation – allows the user to select individual population, household, employment, business count and property variables and compare the results across all precincts in the district. It is from this control panel that Table 2.1 above has been generated. The distribution of the results (%) is included for each variable. Figure 2.4 provides an image of the multi precinct control panel and the top half of the summary table included. The data variables are selected by drop down boxes in the top row of the table in this control panel.

FIGURE 2.4: IMAGE OF MULTI PRECINCT EVALUATION CONTROL PANEL

 **GORE**
District Council

GROWTH STUDY - SPATIAL FRAMEWORK DATABASE SUMMARY

Multi Precinct Evaluation 

Precinct/Neighbourhood	Select Population Variable		Select Household Variable		Select Sector - 2011 Business Count		2011 Total Employment Count		Select Property Variable	
	2006 Census, Usually Resident Population Count	Precinct Share of District	2006 Census Do Not Own Usual Residence	Precinct Share of District	Manufacturing	Precinct Share of District	Manufacturing	Precinct Share of District	Property Count	Precinct Share of District
North Gore Commercial A	-	0%	-	0%	-	0%	-	0%	10.0	0%
North Gore Commercial B	-	0%	-	0%	1	2%	3	0%	15.0	0%
North East Gore Commercial	-	0%	-	0%	-	0%	-	0%	34.0	0%
Central Gore Commercial A	-	0%	-	0%	3	5%	13	1%	27.0	0%
Central Gore Commercial C	3	0%	0	0%	-	0%	-	0%	50.0	1%
Central Gore Commercial B	-	0%	-	0%	-	0%	-	0%	28.0	0%
South Gore Commercial A	-	0%	-	0%	-	0%	-	0%	16.0	0%
South Gore Commercial B	-	0%	-	0%	-	0%	-	0%	11.0	0%
COMMERCIAL PRECINCTS SUB-TOTAL	3	0%	0	0%	4	7%	17	1%	191.0	3%
East Gore Industrial	2	0%	0	0%	3	5%	22	1%	54.0	1%
North Gore Industrial	-	0%	-	0%	7	12%	24	2%	65.0	1%
South East Gore Industrial	-	0%	-	0%	5	9%	33	2%	115.0	2%
South Gore Industrial	4	0%	1	0%	7	12%	30	2%	59.0	1%
Racecourse Road	98	1%	7	1%	-	0%	-	0%	55.0	1%
Central Mataura Industrial	6	0%	1	0%	2	3%	893	58%	42.0	1%
West Mataura Industrial	-	0%	-	0%	-	0%	-	0%	10.0	0%
East Mataura Industrial	22	0%	3	0%	1	2%	9	1%	17.0	0%
North Mataura Industrial 1	3	0%	0	0%	-	0%	-	0%	11.0	0%

3. Gore District Social Infrastructure

3.1 Approach

This section of the report considers the social background to the district and the capacity of social services and infrastructure in regard to future population trends and growth.

The section covers social services, community organisations and groups, recreation (including competitive sport), heritage and tourism.

The approach taken to compiling data for this section and the Social Services Database (and associated GIS map files), was to utilise existing data sets as much as possible. The starting point was therefore the Gore Community Report: Local Services Mapping, undertaken by Family and Community Services, Ministry of Social Development. This report provides a broad community profile and appendices listing social and community service providers. The report itself draws on a wide range of research and data sources.

The material in the Gore Community report was expanded through a combination of the following tasks:

- Review of relevant GDC strategies and plans.
- Review of other relevant studies and reports.
- Internet searching.
- Requests for data from agencies such as the Ministry of Education.

A visit to the Gore District followed in August 2011 by researchers from TBA. They conducted a number of interviews and discussions with key staff from agencies and community organisations as well as Council staff. In the course of this visit further data sets were identified and information obtained from them, in particular the Gore Citizens Advice Bureau (CAB) Community Directory. With 312 entries it is a comprehensive database on social services prepared by Community Connections/Heartland Services.

A number of current and on-going studies and social development programmes are also noted below.

3.2 Key social trends

The Gore Community Report (2006) utilised 2001 census data to profile the District. The report identified the following key trends (2001 data):

- The Maori population of the District was growing much faster than the total population, with lower incomes and high benefit receipts.

- Youth were underrepresented in the population.
- Couples with families were the main family grouping with single parent families under represented, although numbers of two-parent families were projected to decrease.
- The proportion of elderly residents was relatively high.

Examining these trends further using 2006 census data it is possible to see the key trends have largely continued. For instance, the proportion of Maori in the District increased overall from 7.9% in 1991 to a high of 9.1% in 2001 but then fell to 8.6% in 2006 (c.f. 14.0% for the nation). Of considerable interest, however, is that Maori comprised 33% of the residential precinct population of Mataura in 2006.

Overall the total population of the District declined over the ten years from 1996 to 2006 (-8.9%) and particularly in the residential precincts of Mataura (-21% over ten years).

The number of elderly in the population continues to increase and particularly the old elderly – those aged 80 plus. The proportion aged 65 plus has grown from 13.7% of the total residential population in 1996 to 16.7% in 2006.

The population of the towns of Gore and Mataura has areas of social-economic disadvantage, as shown when the deprivation index⁵ is mapped at the meshblock level (Figures 3.1 to 3.3). This disadvantage in the towns is in sharp contrast to the relatively high social-economic status of the rural areas of the district.

⁵ The Social Deprivation Index is a measure of socio-economic status calculated for small geographic areas. The calculation uses a range of variables from the 2001 Census of Population and Dwellings which represent nine dimensions of social deprivation. The Social Deprivation Index is calculated at meshblock level, and built up to the relevant geographic scale using weighted average census usually resident population counts. The nine variables (proportions in small areas) in decreasing weight in the index are Income (People aged 18–59 receiving a means tests benefit), Employment (People aged 18–59 years who are unemployed), Income (People living in equivalised households with income below an income threshold), Communication (People with no access to a telephone), Transport (People with no access to a car), Support (People aged less than 60 years living in a single parent family), Qualifications (People aged 18–59 years without any qualifications), Living Space (People living in equivalised households below a bedroom occupancy threshold), Owned Home (People not living in own home). Source: Statistics NZ.

FIGURE 3.1: MAP OF GORE DISTRICT SOCIAL DEPRIVATION INDEX

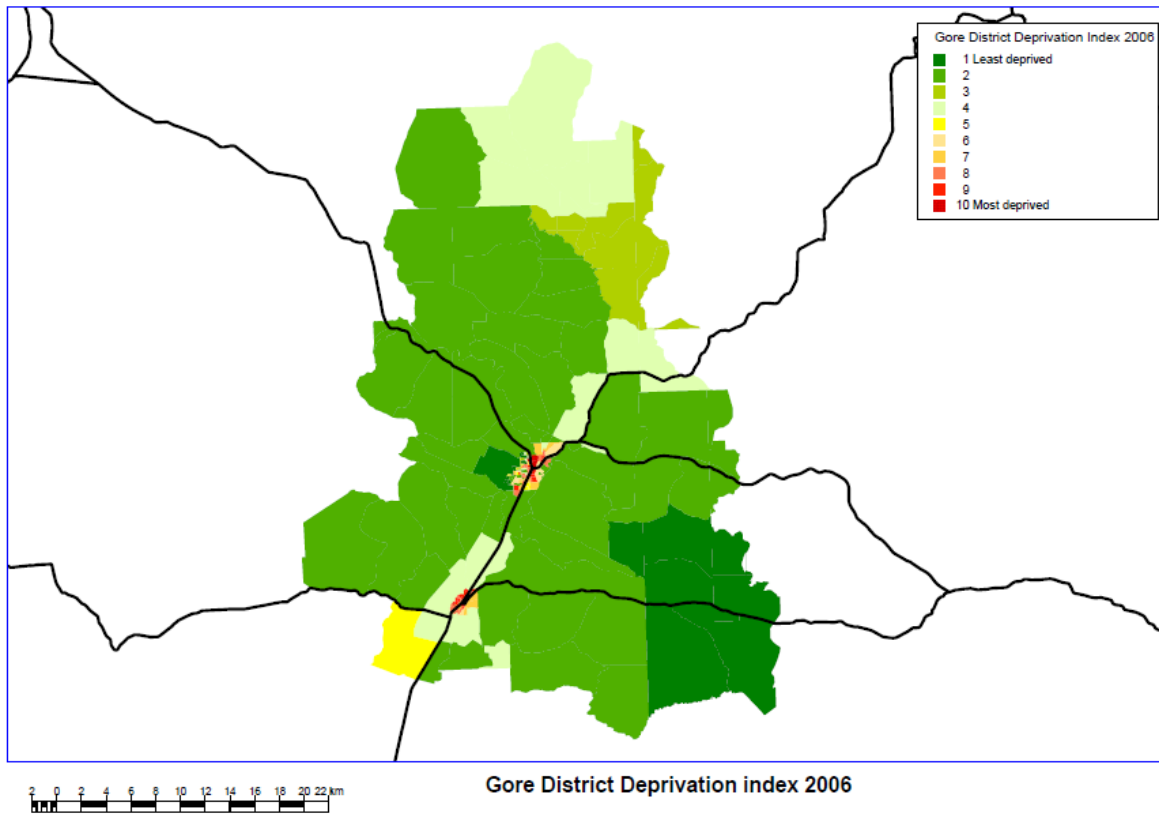


FIGURE 3.2: MAP OF GORE TOWN SOCIAL DEPRIVATION INDEX

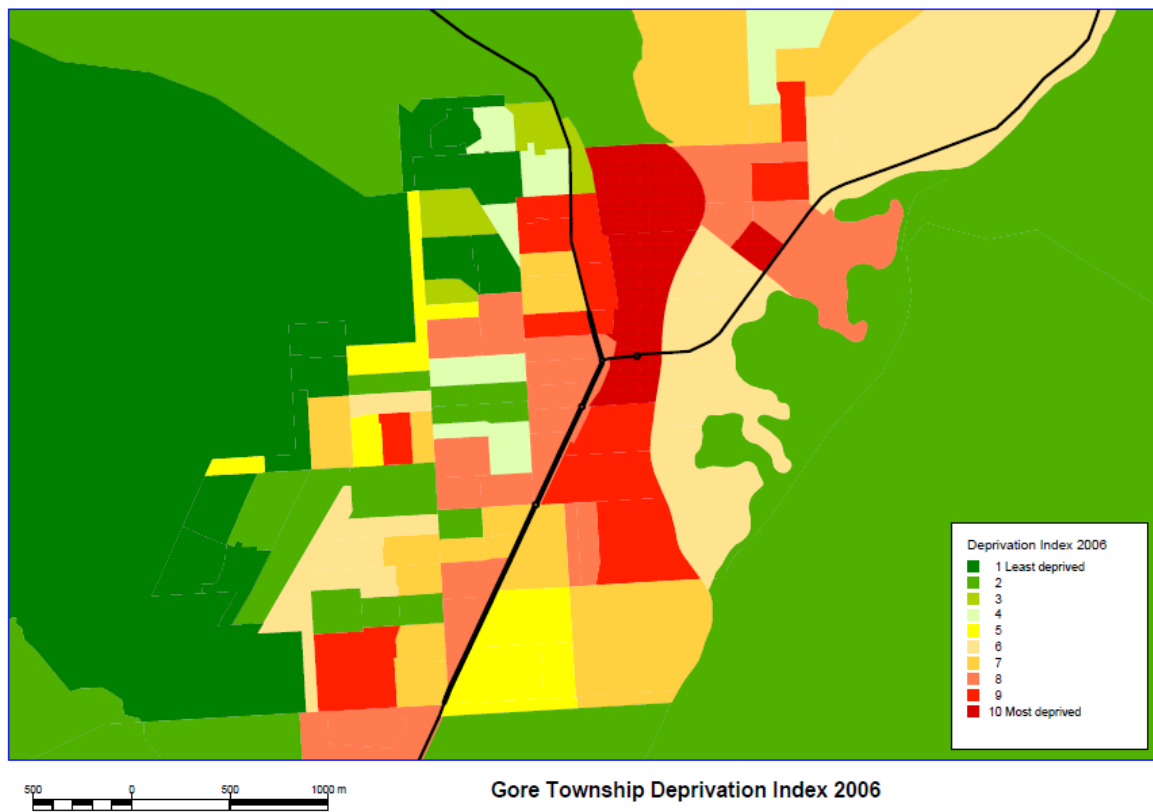
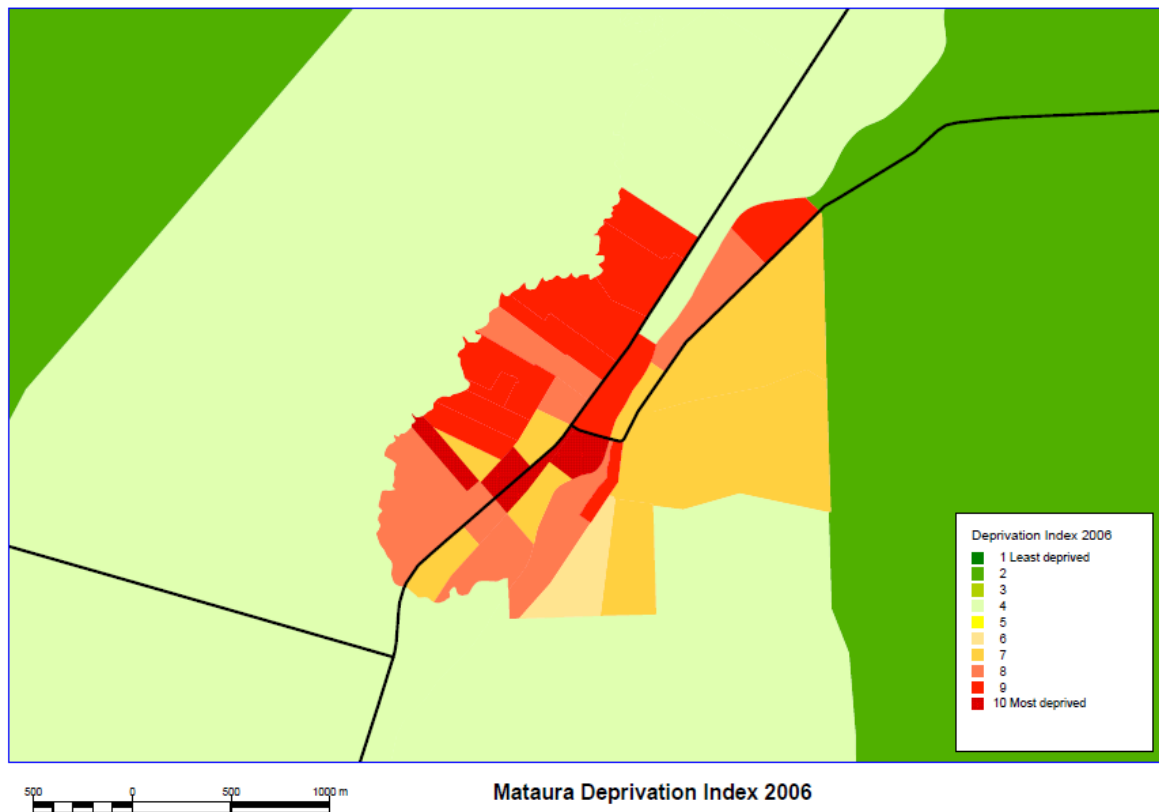


FIGURE 3.3: MAP OF MATAURA TOWN SOCIAL DEPRIVATION INDEX



3.3 Key social needs

The Gore Community Report highlights a number of social needs. These were reinforced by the research for this project. The main needs identified are:

- Parent education and support.
- Special needs education and support for these families.
- Sustainable health programmes for healthy lifestyles with equitable access through the district.
- Youth opportunities and consideration of youth issues.
- Collaboration between agencies and between agencies and community groups.
- Efficient use of limited volunteer resources.
- Improved education and incomes for Maori.

3.4 Social services

Social services are delivered in Gore District by a wide range of government agencies, non-

government organisations and community groups. These organisations are listed in the Social Services Database (see tabs for social services and education sector). While some of the agencies and organisations are based in Invercargill, the emphasis in recording services in the data set was on those based in Gore Town. Major social service and health agencies based in Invercargill are recorded. Access to Government agencies and other organisations based in Invercargill is facilitated through the Heartland office at Community Connections in Gore.

There are numerous community organisations based in Gore, as listed by the CAB. However, as discussed in the recreation section below, many of these organisations are broadly recreational in nature. The Community Connections Office has a physical file listing government, NGO and community based services and activities such as support groups. This listing is also available at the Gore Library but a full update has not been completed since 2008. The Southern Rural Education Activities Programme⁶ (REAP) also has listings of educational facilities in Eastern Southland on its website.

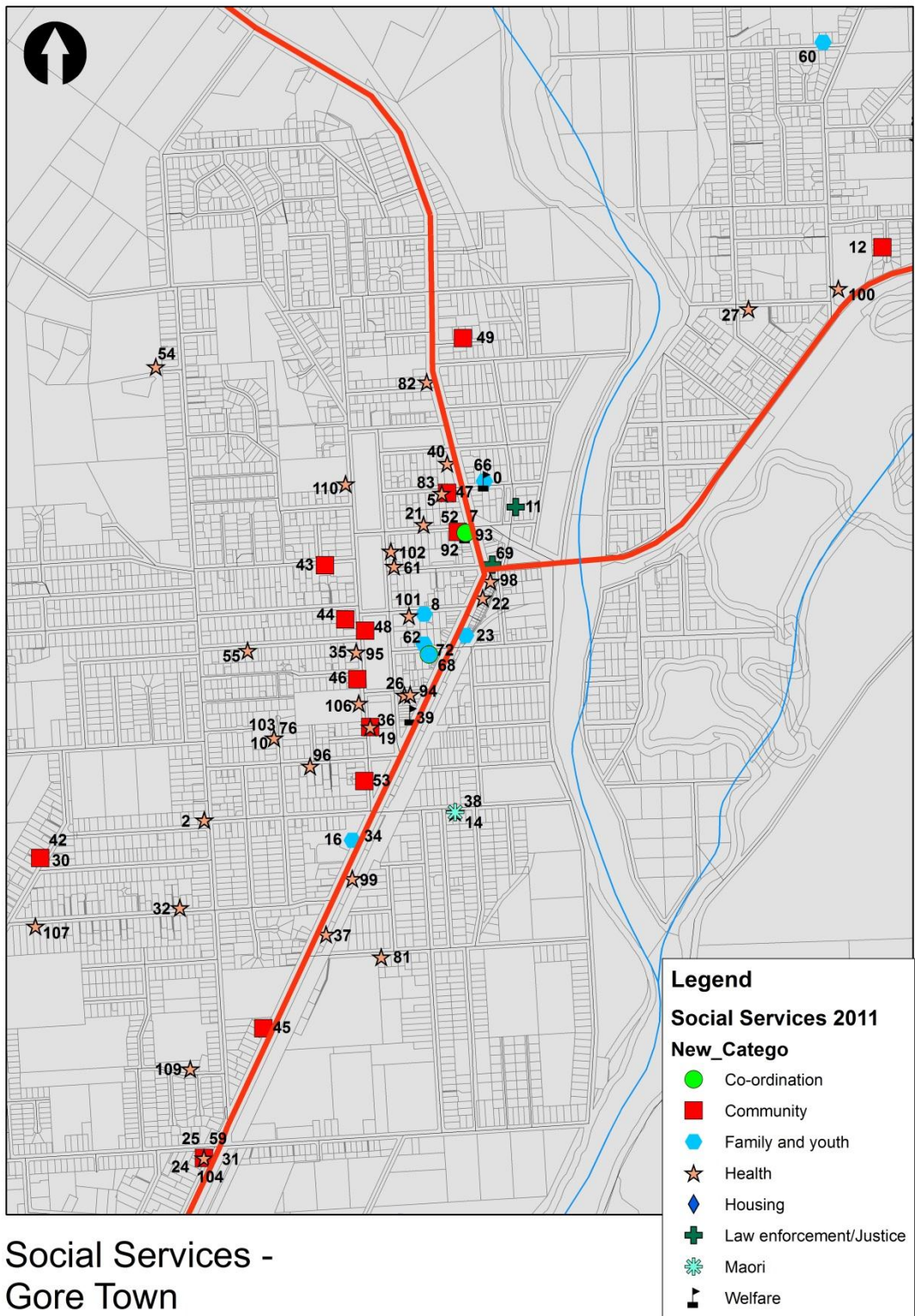
Delivery of community-based services is mostly facilitated through Community House. Spatially, it is notable that key coordination points in Gore Town are spread the length of the town from the CAB on Hokonui Drive in the north to the Community Connections building at the corner of Charlton Road and the Gore-Mataura Highway at the south end of town. In comparison the key sites in Mataura are closely grouped along McQueen Ave. Mataura has a Community Development Coordinator position located in the old library building and administered through Community Connections in Gore.

The main organisations with identified sites are identified in Figure 3.4⁷.

⁶ <http://www.reap.co.nz/index.asp>

⁷ GDC has also been provided with the GIS files to replicate these maps. Refer to the Social Services Database to identify each service according to the numeric identifiers shown in this map.

FIGURE 3.4: MAP OF SOCIAL SERVICES LOCATED IN GORE TOWN BY CATEGORY



Research underway in the district under other auspices includes:

- Settling In – a programme administered by Family and Community Services (FACS) as

a service of the Ministry of Social Development (MSD). It is a community development programme that works directly with refugee and migrant communities to develop and deliver social services needed by those communities⁸.

- MSD and Child Youth and Family Services (CYFS) have been consulting on their Community Response model for families, focusing on key social issues for children, youth and elderly in Southland - due out in September.
- The Strengthening Parenting in Southland project is undertaking research on the current provision of parenting services in Southland; and the needs and views of parents and children, in order to inform the development of a Parenting Strategy for Southland. The research will include a Gore sub-component.
- The Foundation for Youth Development (FYD) have a Community Development Strategy in place for the Maitua community, which sequences the FYD programmes and measures⁹ the long term impact on young people and the community. These programmes are connected through Maitua Primary School and Gore High School¹⁰.

Schools

Schools are listed in the Education Sector Tab of the Social Services Database.

The District is well served with a range of preschool education, schools both contributing primary (yr1 to yr6) and full primary (yr1 to yr 8), and intermediate and secondary education (yr 7 to yr13 or yr9 to yr13). These include both state schools and integrated (Catholic) schools. St Peters and Gore High have boarding facilities. Schools are located in the main centres of Gore and Maitua as well as in rural areas. All the schools are co-educational. The options for single sex schools are in Invercargill or boarding schools elsewhere.

There is some movement outside the district for schooling, with high school students in the north of the district bussing to Blue Mountain College in Tapanui and some students from Riversdale to the north-east coming into Gore High School. To the south of the district, some students attend the primary school and also high school in Wyndham.

A number of additional school services include dental nurses, two government funded homework programmes and resource teachers of learning and behaviour (RTL) advisors.

There are three RTL advisors in the district, based at Longford Intermediate, West Gore School and Gore High School. The active REAP centre in Gore provides an alternative education programme. Truancy services are provided by REAP and Community Connections is involved with an inter-agency

⁸<http://www.immigration.govt.nz/NR/rdonlyres/B7E09FCB-793F-4219-BD85-74DD2ACA47BD/0/FamilyCommunityServices.pdf>

⁹ A University of Otago researcher is undertaking longitudinal research tracking youth and families in Maitua and their response to programmes such as outdoor education.

¹⁰ <http://www.fyd.org.nz/Programmes/Regions/Southland.aspx>

programme to increase participation in school and learner achievement¹¹.

The Database shows there are a number of early childhood education options available including kohanga reo in Gore and Mataura. Not included are playgroups, available on the REAP website.

Tertiary Education and trades training

The only tertiary education provider physically based in Southland is the Southern Institute of Technology (SIT) based in Invercargill. The SIT has a campus in Gore. The Institute provides a wide range of courses including trades training. There is capacity to increase training options through the Gore campus, possibly in conjunction with a special bus services to Invercargill in the event of an increased demand for skilled workers from the district.

There are a number of adult educational courses that are both practical and recreational in nature offered through SIT. REAP also provides some community education courses and parenting courses.

Health

The district has substantial health services as shown by the social services dataset in the Database. Core services are provided by Gore Hospital and the Gore Medical Centre (primary health care). There are also a number of private providers of services such as counseling, dentistry, ultrasonography and physiotherapy.

Gore Hospital, built in 1999, is operated and managed by Gore Health Ltd, and owned by Gore and Districts Health Incorporated. It includes a 20-bed facility with 12 acute medical beds, 4 assessment, treatment and rehabilitation beds and 4 maternity beds. Gore Health Ltd provides a number of in and outpatient services and to the population of eastern Southland and south Otago. These services include:

- 24/7 Acute Emergency Department services
- Medical and Assessment, Treatment & Rehabilitation (AT&R) inpatient services
- Maternity birthing and postnatal care services
- Public and private outpatient clinics
- Allied Health services including: District Nursing, Meals on Wheels, Home Help, Domestic Assistance, Occupational Therapy, Physiotherapy, Social Work, Needs Assessment, Speech Language Therapy, Day Clinic
- Pulmonary Rehabilitation programme

¹¹ The Gore Trials Programme is the only South Island case study for this youth directed programme aimed at truancy and educational achievement with collaboration of MSD, Health, Justice, Education and Police. Trials will consult with the community to reduce youth offending, use of drugs, truancy and increase engagement in education

- Chemotherapy
- MoleMap
- Mobile Surgical Services
- Radiology
- Laboratory Diagnostic Services

Gore Hospital liaises with Southland Hospital and Dunedin Hospital to arrange care for more acute medical cases. Southland Hospital (Kew) is just 45 minute drive by ambulance and provides specialist and tertiary services.

- Allied health and community services delivered from the hospital include:
- district nursing hours
- meals on wheels (to Gore area and Wyndham)
- Physiotherapy
- Social Work (includes needs assessments).

3.5 Recreation

Recreation comprises the very wide range of cultural, social and physical activities that people engage in for pleasure, sociability, and physical and mental challenges. This activity is closely linked to physical and mental health in the District. Some recreation activities are informal and casual, conducted with friends and family, others are highly organised associated with clubs and societies. Many are provided commercially, such as in the area of entertainment, and almost all other activities are supported in some way by commercial, particularly retailing, companies, which sell the products and equipment central to much recreational experience.

In the context of this discussion about recreation in Gore District there is a need to account for the public and private physical facilities and spaces in which recreation takes place but also to consider the services and programmes which are designed to support and enhance recreation including those associated with skills education and voluntary work such as organising, administering, fundraising, transport, coaching and equipment maintenance.

The situation with respect to the provision of recreation resources in the Gore District can be summed up with the following points:

- There is evidence of a broad range of provision associated with publicly and voluntarily provided community recreation facilities and services.
- The township of Gore seems particularly well provided for in this regard with Mataura also being an important centre. It is less clear how the smaller townships and rural districts are catered for.

- Within and beyond the immediate borders of Gore District, there are a wide variety of outdoor recreation resources some managed by local and central government, agencies such as Fish and Game Southland, the Department of Conservation and Gore District Council, and private owners providing for a range of activities which can be placed on two continua: casual to organised and passive to active.
- The District is served by some skilled, knowledgeable and enthusiastic people employed in the recreation field by such agencies as the Gore District Council, Sport Southland, Fish and Game Southland or who are associated with a variety of voluntary clubs and organisations.
- With the exception of physical recreation, some outdoor recreation and district organisational contact information there is a lack of codified data, in the form of studies, inventories and strategic documents about recreational participation, preferences, demand and provision in Gore District.

Recreational participation

The Gore Citizens Advice Bureau's (CAB) *Community Directory* indicates that there is a relatively large number of community groups and organisations involved in a range of recreational and community oriented activities in and around Gore District. Approximately 35% of the entries in the *Directory* are associated with physical recreation which suggests that arts, culture, hobbies, and a wide variety of social activities predominate. The CAB is currently up-dating the *Directory*.

There is no specific data on rates of participation in recreational activities and this gap may need to be filled in order to help develop an updated recreation strategy – as discussed below.

Physical recreation and Gore District Council

In the area of physical recreation Appendix C of the Gore District Physical Recreation Strategy written for the GDC by Prophet Asset Management in 2007, with the support of Sport Southland and Sport and Recreation New Zealand (SPARC), contains a database of existing programmes and providers including recreation programmes, sports and recreation clubs, health programmes, promotions and events. This appendix lists 11 recreation programmes, 61 sport and recreation clubs, five health programmes, three promotions and 10 events. There is some overlap with the CAB listing. Some organisations are based outside Gore District, e.g., at Edendale, Wyndham and Riversdale and this reflects the interdependent nature of the various townships and adjoining rural areas in and around Gore (see similar comments on the social services database). The material in the Gore District Physical Activity Strategy appendix is available on the Council web site¹² for download. An allied group of reserves management plans, sports field management plans and the town belt management plan is also available on the web (<http://www.goredc.govt.nz/managementplans>). Dolamore Park, an important peri-urban outdoor recreation reserve covering 95 hectares, is an important local physical recreation resource (<http://www.goredc.govt.nz/dolamore>) and adjoins the Croydon Bush Scenic Reserve managed by Department of Conservation. The District Council also provides a number of maps on its web site (<http://www.goredc.govt.nz/maps>) some of which relate

¹² [http://www.goredc.govt.nz/sites/default/files/documents/mgmt_plans/Physical_Activity_Strategy_\(June_2007\).pdf](http://www.goredc.govt.nz/sites/default/files/documents/mgmt_plans/Physical_Activity_Strategy_(June_2007).pdf)

to recreation.

The overriding impression from our field research is that the district is very well serviced but many clubs and societies are in decline and this is leading to amalgamations and associated rationalisation with some centralisation of activities from rural areas to Gore Town and also Invercargill. This is partly because these bigger centres have higher quality facilities. A good example is the recently installed artificial field hockey surface in Gore which is attracting players from smaller centres in the district such as Mataura. This means that there is growth in some areas of the District but associated decline in others. There is clearly capacity and desire to absorb newcomers if a growth scenario were to apply.

Consistent with the GDC's focus on physical recreation, parks and reserves its priorities for future development in this area are significantly facilities based. In specific locations within the district there is a need for new facilities. In North West Gore, near Coutts Road, there is a need, for example, for a children's play area and associated reserve. Other gaps in provision include the need to extend the multi-sport complex¹³ from its current configuration of ice rink, stadium/events space, aquatic centre and a variety of outdoor sports fields to include a training gymnasium with a range of machines and weights, a cafe and commercial kitchen and offices for Sport Southland staff who are currently housed in a prefabricated building near the car park. Our visit to Mataura indicated the importance of the recently built Community Centre¹⁴ and the Centennial Swimming Pool. In the smaller settlements in the district physical recreation is catered for in a variety of facilities and sports grounds, many of them listed in the CAB database.

The Council also recognises that it has a number of gaps in its knowledge about demand for recreation services and facilities. It acknowledges, for example, a need to know more about the connections between the development of new residential areas (at some time in the future) and the need for new physical recreation facilities and the ways they could be connected to other parts of the urban areas, including recreational facilities, using corridors for walking and cycling. The need for more cycleways that are safe is now an important issue and is being dealt with in the Streetscape Strategy.¹⁵ Proposals have been made to establish cycleways in various parts of the district including on stopbanks on the Mataura River, over the bridge in Gore and between Gore and Mataura.

The Council also acknowledges that there is insufficient staff to run programmes although SPARC has recently given a grant of \$50,000 to help Sport Southland employ a programmer to provide services to encourage particularly young people (but not exclusively) to become more active.

Outdoor recreation

As already indicated there are many outdoor recreation resources available to residents in the district. These resources include the Croydon Bush and Dolamore Park Scenic Reserves and the Dolomore walking track. There are hunting opportunity in the Hokonui Hills (deer and pigs) and also duck shooting on a large number of private ponds and wetlands through the district and along the river system.

¹³ <http://www.goredc.govt.nz/multisports>

¹⁴ <http://www.lgnz.co.nz/lq-sector/community-boards/Awards/2009-winners/matura.html>

¹⁵ <http://www.goredc.govt.nz/node/207>

One of the most important recreation resources is the Mataura River and its tributaries, which are internationally renowned for their highly productive brown trout fisheries. One of the issues currently of interest to Southland Fish and Game is that between 2001/2 and 2007/8 there was a drop off in fishing days from 36,850 (approx) to 19,360 (approx) on the Mataura in its lower reaches downstream of Gore. The situation above Gore remained much the same. All of this occurred in conditions which suggest water quality has remained static in the intervening period. There is obviously a knowledge gap here but professionally informed speculation suggests that New Zealand anglers perceive the water quality is declining relating to changes in land use. However, people may be relating perceived lower water quality to warnings about swimming, i.e., bacterial contamination and the presence of blue-green algae in periods of low summer flows. The upper river is very heavily fished up to and above Garston. Fish and Game would welcome greater participation in fishing on the Mataura River below Gore. There is scope for instructional advice on fishing the lower river using such media as YouTube.

There is a need for more research around this particular issue, i.e., the drop off of fishing activity on the lower Mataura; and more generally there is a lack of research on recreation participation, including that associated with access to both public and private resources. This knowledge is important for understanding potential impacts as a result of land use change and any increase in population. There is a particular need for research into the distribution and management of open water wetlands on private and public lands in the district.

3.6 Arts and Heritage Management

Arts and heritage resources are an important aspect of recreation activity in the district, with people involved in creating and maintaining the resources as well as in enjoying them. These resources are also important to the hospitality sector. It is important to understand heritage resources are dynamic and new images and icons are added over time, yet they also provide an important link to the past and sense of place in any period of growth and social change.

Gore District has an excellent Art Gallery,¹⁶ Heritage Centre,¹⁷ and function centre.¹⁸ The St James Theatre,¹⁹ run by a charitable trust, runs films and provides a venue for live entertainment. The Gore Town and Country Club²⁰ with a membership of 1,200 people provides a range of hospitality and meeting spaces associated with cultural activities and festivals. The GDC also provides a library service operating in Gore and Mataura townships. The CAB listing suggests strong community participation in the arts, crafts, hobbies and cultural activities. There is however no codified strategy for arts and cultural development; but as for parks and physical recreation the area in question is managed for the Council by a person who is passionate about his role and who has a very good understanding of participation in arts and heritage issues and activities.

There are strong links in management terms between, arts, heritage and tourism in the district. It

¹⁶ <http://www.goredc.govt.nz/artgallery>

¹⁷ <http://www.goredc.govt.nz/moonshine>

¹⁸ <http://www.goredc.govt.nz/jamescummingwing>

¹⁹ <http://www.sbstjamesgore.co.nz/>

²⁰ <http://www.goretclub.co.nz/>

was felt that key events and cultural infrastructure were well provided for given the size of the district. This is particularly the case for Gore Town. The key events associate with arts and heritage are:

- Gold Guitar²¹
- Hokonui Moonshiners' Festival²²
- Hokonui Fashion²³
- Southland Rhododendron Festival²⁴
- Gore A& P Show and exhibitions and heritage displays²⁵
- An additional arts event associated with the biennial Waimumu field days²⁶

The GDC is involved in events and festivals such as the Christmas parade and carol singing and the cheese rolling at Waikaka although the latter is sponsored significantly by the private sector.²⁷

The Council's role is in establishing and maintaining connections and providing facilities for events, to encourage tourism and the development of place branding. This is a growth area – Hokonui Fashion, for example, now runs over two nights. Tourist numbers are reported to be increasing, however data from the visitor information centre are inconsistent, with an automatic door counter installed in 2009. The 2010 count was 25,547. The Council's Department of Arts and Heritage was created in the mid 1990s and has only recently absorbed promotions which creates linkages between events which have been run by individuals over a long period of time. Hokonui Fashion started in 1988, for example. Another good example of a District attraction is the Croydon Aviation Park at Mandeville, which is a display site and also the centre of aircraft restoration, especially associated with pre-jet de Havilland aeroplanes. This site also involves some railway heritage.

The Gore Heritage Centre, Croydon Aviation Park and the Art Gallery work together closely. The key ingredient in the collaboration is people and personalities of longstanding residence working together over the long haul. It is also about welcoming new people and involving them. There is always a need for more resources and volunteers.

In the area of heritage management there is a limited capacity within the townships and rural areas to care for heritage. The current site of the McDonalds restaurant at 140 Main Street is an example of a loss of a heritage building that alerted locals to the issues around the main street. As a result, the heritage provisions in the District Plan are being revised. The rapid changes in land use associated with the growth of dairy farming in the district means that much rural built heritage associated with sheep and beef pastoral farming is being lost as are examples of the equipment used

²¹ (<http://www.goldguitars.co.nz/index.cfm/fuseaction/pages.home>)

²² (<http://www.hokonui moonshinefest.co.nz/index.cfm/fuseaction/pages.home>)

²³ (<http://www.hokonui fashion.com/index.cfm?fuseaction=pages.home>)

²⁴ (<http://www.eventfinder.co.nz/2011/oct/gore/southland-rhododendron-festival>)

²⁵ (<http://www.goreapshowgrounds.co.nz/>)

²⁶ (<http://www.southernfielddays.co.nz/>)

²⁷ (<http://www.cheeserolling.org.nz/sponsors.html>)

during this period. With there being no inventory of buildings of rural heritage value it is very difficult to identify buildings to protect. Attempts are being made to collect heritage equipment and store it for later display and interpretation.

3.7 Conclusions and Recommendations

There is a substantial base of information about the population, social needs and services of the Gore District. We have captured as much as possible in the Social Services Database. This information will provide a useful starting point for social impact assessments for specific resource developments.

A major issue facing the delivery of social services in Gore District, especially in the face of a growth scenario with incoming population, is the need for coordination and collaboration to make the best use of resources from funding to professional expertise and volunteers. There are at present at least two main sets of data on social services and community organisations, one held by the CAB and one by Community Connections. A useful assistance from the Council would be to help rationalise this information base and help strengthen a strategic approach to social services and community development. We recommend that:

1. The Council provides technical assistance in data management to help Community Connections develop a shared data set that can be utilised by all organisations involved in delivery of social services and community development and more readily updated and made available through outlets such as the CAB, service centres and libraries.

The main focus of the recent regional Community Organisation Needs Assessment²⁸ was to identify and determine the extent of, issues, pressures and/or opportunities impacting community organisations throughout Southland. Part of the recommendations of this study was to develop “individual ‘community based strategic response plans’ in association with community planners and local authorities to address causes not just symptoms”. We recommend that:

2. in preparing a district growth management strategy the Council implement Venture Southland’s proposed approach by preparing community based, strategic responses to current and future social needs and community development issues - with key needs likely to include:
 - Parenting support
 - Youth issues
 - Skills gaps and training opportunities (matched to any new industry and related employment), with a particular focus on Maori
 - Support for new settlers, from initial induction and ongoing

²⁸ [Southland Community Organisations Needs Assessment Research Report \(2010\). Venture Southland.](#)

- Services for the elderly, particularly for ageing in place
- Coordination and collaboration in service delivery.

Notwithstanding the obvious significant level of recreational resource provision and participation in a wide range of activities in Gore District there is a need for a more strongly codified approach to recreation planning if a comprehensive and informed contribution is to be made to a Growth Management Strategy. We recommend that:

3. a strategy for the provision of community and outdoor recreation services, programmes and facilities in the district be developed. This should include consideration of the fullest range of activities and resources associated with the very wide range of cultural, social and physical activities that people engage in for pleasure, sociability, and physical and mental challenge.
4. as part of (3) above the GDC's Physical Recreation Activity Strategy, which is now four years old, should be updated.
5. also as part of (3) above a number of smaller research projects be conducted to examine the range and quality of recreational resources in the District, the impediments to access to and use of those resources, and how those impediments may be overcome.

3.8 Deliverables

A copy of the Gore District Social Services Database, described above, is provided along with this report. This is an Excel file and contains the detailed datasets for education and social services, recreational facilities and heritage trees and sites²⁹. The detailed data tables are also replicated in associated GIS files (also provided to GDC) which will allow Council to generate maps of any specific variable and category. Figure 3.5 provides an image from the education services dataset and Figure 3.6 provides an image from the social services dataset contained in the Database.

²⁹ Recreational Facilities and Heritage Trees data has not been modified from the original data provided by GDC. Some additional Heritage sites/facilities have been added to those provided by GDC in the Heritage dataset.

FIGURE 3.5: IMAGE OF THE EDUCATION SECTOR DATASET

Gore District School Sector Base Data					
Name	Physical Address	Postal Address	Phone	Email	
Gore High School	Coutts Road, Gore 9740	Private Bag 50024, Gore 9740	03-2089130	ghs@gore-high.school.nz	
St Peter's College (Gore)	121 Kakapo Street, Gore 9740	P O Box 94, Gore 9740	03-2089060	office@stpetersgore.school.nz	
East Gore School	3 Wentworth Street, Gore 9710	3 Wentworth Street, East Gore, Gore 9710	03-2085331	office@eastgore.school.nz	
Gore Main School	Ardwick Street, Gore 9710	39 Ardwick Street, Gore 9710	03-2087615	office@goremain.school.nz	
Kaiwera School	88 Kaiwera Rd	88 Kaiwera Rd, RD2 Gore	03 2053714	School closed	
Knapdale School	Knapdale Road, Gore 9773	872 Knapdale Road RD 3, Gore 9773	03-2089473	principal@knapdale.school.nz	
Longford Intermediate	5 Wayland Street, Gore 9710	5 Wayland Street, Gore 9710	03-2087416	admin@longford.school.nz	
Willowbank School	24 East Chatton Road RD 3, Maitland, Gore 9773	9 East Chatton Road RD 3, Gore 9773	03-2071876	willowbank@woolfschool.nz	
Mataura School	Oakland Street, Mataura 9712	33 Oakland Street, Mataura 9712	03-2038507	office@mataura.school.nz	
Otama School	12 Mcbain Road RD 3, Otama, Gore 9773	12 Mcbain Road RD 3, Gore 9773	03-2089454	office@otama.school.nz	
Pukerau School	Pukerau Street, Gore 9772	24 Pukerau Street RD 2, Gore 9772	03-2053857	office@pukerau.school.nz	
St Mary's School (Gore)	14 Ardwick Street, Gore 9740	P O Box 120, Gore 9740	03-2087733	admin@stmays.school.nz	
Waikaka School	22 Matheson Road RD 5, Gore 9775	22 Matheson Road RD 5, Gore 9775	03-2072887	office@waikaka.school.nz	
West Gore School	Kitchener Street, Gore 9710	114 Kitchener Street, Gore 9710	03-2087586	office@westgore.school.nz	
Waikoiko School	Kai Flat Road, RD1 Gore	Kai Flat Road, RD1 Gore	03-2076860	principal@waikoiko.school.nz	
TOTAL GORE DISTRICT					
Blue Mountain College	State Highway 90, Tapanui		03-2048358	admin@bluemountain.school.nz	
Menzies College	Alma St, Wyndham		03-2064979	admin@menzies.school.nz	
Te Wharekura o Arowhenua	734 Tweed St, Invercargill	734 Tweed St, Invercargill	03-2167701	tari@arowhenua.school.nz	
Oxford Kindergarten	16 Oxford St, Gore 9710		03-2084147	oxford.kindy@calliply.school.nz	
Longford Kindergarten	Vera St, Gore				
Elsie St Kindergarten	6 Elsie Street, Gore		03-208 6575	elsiestreet@calliply.school.nz	
ABC Preschool	8 Inwell St, Gore 9710	P O Box 313, Gore	03-2088499	abcnps@childcare.govt.nz	
Aroha Early Learning Centre	104 Broughton ST, Gore 9710		03-2085656	lynda-aroha@esi.co.nz	
Aroha Early Learning Centre					
Mataura and Districts Marae, Kohanga Reo	15 Stuart Street, Mataura		03-2038902		
Te Kohanga Reo o Kia Ngawari	106-108 Kana St Mataura 9712	P O Box 42 Mataura 9356	03-2037460	whanau@k10d054.kia.govt.nz	
Te Kohnuga Reo te Ara Tika	2 Oreti St, Gore 9710	2 Oreti Street, Gore	03-2080343	whanau@k10D016.kia.govt.nz	
Gore Playcentre	6 Devon Street, Gore	6 Devon Street, Gore	03-2142033		
Mataura Playcentre/Playgroup	8 Dover St, Mataura 9712		03-2080134	leented@clear.net.nz	
Kids Start Banados	Irk Street, Gore	PO Box 217, Gore	03 203 9270,03 214 7751	goreoffice@barnard.org.nz	

FIGURE 3.6: IMAGE OF THE SOCIAL SERVICES DATASET

Gore District Social Services Data						
Revised during and after field trip						
Note: this column contains notes in field						
CN is Community Connections						
Name of services	Category of service	Sub-Category of Service	Provider type	Brief description		
MSD/Child Youth and Family	Family and youth	Family and youth	Government	Protection of children to 17 ys with social workers.		24 Traf
Department of Internal Affairs	Community	Community development	Government	COGS Funding, training and advice for community groups		120B L
Housing NZ Corporation	Housing	Housing	Government	Housing assistance to those in need		47B Ta
MSD/WINZ	Welfare	Welfare	Government	Employment support and benefits		24 Tarf
MSD/Family and community services	Family and youth	Family and youth	Government	Lead and co-ordinate non-government support of families and communities		Cornet
Heartland Services	Co-ordination	Co-ordination	Government	Co-ordination of social services in the community		1 Char
NZ Police	Law enforcement/Justice	Law enforcement/Justice	Government	Crime and safer communities, youth aid, education for traffic and personal safety, victim support		Cornet
NZ Police	Law enforcement/Justice	Law enforcement/Justice	Government	Crime and safer communities		117 Me
Public Health South	Health	Public health	Government	Public health		92 Spe
Strengthening Families	Family and youth	Family and youth	Government	Meeting needs of families		1 Char
Southland DHB	Health	Health services	Government	Regional Health services		Old nu Road, (
Southland Hospital (Kew)	Health	Hospital	Government	Regional Hospital services		Kew R
Invercargill Community Mental Health Services	Health	Mental Health	Government	Mental health services		Southl Road,
Gore Community Mental Health Services	Health	Mental Health	Government	Mental health services		Gore h
Gore Health Limited	Health	Hospital	Government	Hospital services and district nursing, meals on wheels,needs assessment, 20 bed hospital, maternity, primary care x-ray lab, occ therapy		9 Birc

4. Gore District Retail Demand & Supply Model

4.1 Introduction

To understand the retail environment in Gore District and Gore Town currently, and in the future, there are two key elements to consider. Firstly, where consumers spending at businesses in the area live and how much they each spend, and secondly where spend by local residents goes. Together these components can tell us how Gore's retail areas function, how attractive these areas are to consumers living in different places, and how large the flows of retail spend are between areas. All of these aspects are important to understand how Gore retail works now, and to set the base from which we can assess the implications for retail supply from changes in the future demand (i.e., growth in consumer numbers by different locations). M.E has developed the Gore District Retail Demand and Supply Model for this purpose.

This section provides a high level summary of the Model results for 2010. It covers sub-regional retail patterns at an aggregate (all store types) level, and for aggregate origins/destinations. More detailed tables with origin/destination and store type breakdowns are provided in Appendix 3. All data in this section is for the 2010 calendar year.

4.2 Approach

Data sources

The assessment of the demand-supply balance was undertaken using two key data sources. Firstly, a customised dataset of consumer origin-destination data was sourced from BNZ Marketview. BNZ's Marketview data records credit and debit card data from every transaction made by BNZ customers, including the size and timing of every transaction, the location and type of merchant involved in the transaction, and the address of the cardholder coded to a CAU. Before being supplied, this data is collated to preserve confidentiality of both individual merchants and cardholders. BNZ has a 16-18% market share of credit and debit cards, and credit and debit cards make up about 65% of all retail spend. Hence Marketview data covers about 12% of all retail spending in NZ, which is statistically very representative sample of all retail spending. In other words, retail spending patterns by BNZ customers are assumed to be representative of other bank customers and therefore the population overall.

The second key data source is M.E's *Retail Demand and Supply Model 2010*. This model provides estimates of the current (2010) situation throughout New Zealand for each retail and service store type. The *RDSM* is a comprehensive and detailed model, which integrates demand-side data (based on analysis of household, employment, and tourism data), with supply-side data (based on retail sales, employment and operating units by each retail and service store type). Demand estimates are based on the number and composition of households, businesses, employment and visitor numbers (international and domestic) and their mean retail spending levels.

Supply estimates are based on the economic activity counts from Statistics NZ's Business Frame (Employee Count (EC) and number of geographic units (outlets or business units)) for 2010, actual retail sales by store type, floorspace estimates per person employed and regional variations in employee productivity.

Gore Retail Demand & Supply Model

The two key data sources each tell us part of the picture about the flows of retail spending into and out of Gore District. Pulling them together allows us to describe both the total quantum of demand and supply (sales), and how each are distributed across different retail store types and geographically. The output of that process is a matrix for each store type of the demand coming from each meshblock/precinct in Gore District, and where that demand is spent. The data from those matrices is summarised in sections 4.3 and 4.4, and in more detail in Appendix 3.

4.3 Key Results and Trends 2010

Overview

Retail and hospitality activity in Gore District is concentrated in Gore Central³⁰, with only a small number of businesses located in Mataura and scattered throughout the rest of the district. Total district sales in retail and hospitality (excluding automotive) in 2010 were estimated to be \$150m, of which around 89% (\$133m) were made by businesses in Gore Central, and 11% (\$17m) by businesses elsewhere in the district (including Mataura) (Table 4.1). Note, Appendix 4 provides a concordance between precinct/neighbourhoods and the summary 'origin' locations used in the Retail Model summary tables contained in this Section and Appendix 3).

The District's retail role is a tale of two different functions:

- For frequently consumed goods and services such as food and groceries, cafes, restaurants, bars and automotive services, the Gore Town centre serves as a service centre for most of the district, and significant parts of neighbouring Clutha and Southland Districts.
- For less frequently consumed products (such as furniture and appliances), and those from which consumers favour a wide range of choice (such as apparel), Gore is a less attractive destination, and significant proportions of local demand leak out of the district for Invercargill (70km/1 hour south) and Dunedin (150km/2 hours east).

³⁰ For this report section, Gore Central is comparable with the aggregation of Gore Commercial precincts in the Spatial Framework.

Origin of Sales

As the main population base in the district, the Gore township or urban area is the origin of \$57m (just over one-third) of the \$150m of retail and hospitality sales made by district businesses, with a large inflow from outside Gore District contributing \$61m (41% of spend in the district, Table 4.2). Of sales attracted from those out-of-District consumers, two-thirds comes from people travelling from neighbouring Clutha and Southland Districts, for whom Gore is the closest large centre. Around \$8m (6% of total district sales) is made to consumers who live outside the lower South Island, including spend by tourists passing through the area. The customer base for district and Gore Town sales varies by store type, as explained below in section 4.4, and shown in more detail in Appendix 3.

TABLE 4.2: ORIGIN OF TOTAL 2010 RETAIL AND HOSPITALITY SALES (EXCLUDING AUTOMOTIVE) IN GORE DISTRICT

Customer Origin	Gore Central	Rest of District	Total Gore District
Gore			
Town Centre	0%	0%	0%
Residential West	12%	9%	12%
Residential Central	9%	5%	9%
Residential North	15%	9%	15%
Urban Fringe	2%	2%	2%
Industrial	1%	1%	1%
Sub-total Gore	39%	26%	38%
Mataura			
Residential	6%	21%	8%
Industrial	1%	4%	1%
Sub-total Mataura	7%	25%	9%
Rest of District			
Industrial	1%	1%	1%
Rural East	2%	1%	2%
Rural North	6%	3%	6%
Rural West	4%	3%	4%
Sub-total Rest of District	13%	8%	13%
Outside Gore District			
Waitaki District	0%	0%	0%
Central Otago District	1%	0%	1%
Queenstown-Lakes District	1%	0%	1%
Dunedin City	2%	2%	2%
Clutha District	13%	2%	12%
Southland District	16%	15%	16%
Invercargill City	2%	11%	3%
Other Origins	5%	10%	6%
Sub-total Outside Gore District	41%	41%	41%
Total All Locations	100%	100%	100%

Destination of Gore Demand

At an aggregate store type level, approximately 70% of spend by district residents is spent at district businesses, and 30% at businesses outside Gore District. This 30% is referred to as 'leakage', that is, spend that is not spent at local businesses. Some level of leakage (10-20%) is natural for consumers in every retail catchment as residents spend money on retail goods and services when away from home on holiday. Online shopping also accounts for some leakage of local demand. The extent of observed leakage varies depending on the characteristics of the supply environment, in particular the range of store types and brands available to the consumer locally. Leakage of 30% indicates that Gore residents can fulfil a large part of their retail needs near where they live, but that there are certain store types in Gore that are not represented or which consumers perceive as offering a limited supply, and so those consumers use stores elsewhere for some of their retail needs. Trends are fairly consistent across all customer origins within Gore District (Gore/Mataura/rural areas).

Gore Central is the dominant retail centre in the district, and overall 89% of spend made by Gore residents in Gore District is directed to Gore Central, with the other 11% made by businesses in Mataura and elsewhere in the District. Mataura's retail supply plays very much a local/convenience role, affording Mataura consumers the opportunity to shop close to where they live (in the limited range of store types represented there), but having a lower attractiveness to non-Mataura residents. Gore township residents and those living in the district's rural areas spend 92-93% of their district spend in Gore Central, but for Mataura residents this figure is 69%, due to the greater proportion spent in their local Mataura centre (Table 4.3).

Gore is a significant retail centre for many residents of Clutha and Southland Districts, and 11% of the total retail spend by Clutha residents, and 7% of those from Southland District is spent in Gore District.

4.4 Retail Store Type Summary

This section provides a high-level overview of demand-supply flows in each store type in and out of Gore District. A more detailed breakdown is provided in Appendix 3. At an aggregate level there is a net inflow to Gore District retail and hospitality businesses of \$23.7m, which is equivalent to around 19% of demand from Gore District households. This net inflow is created by a larger inflow from non-Gore District households (\$61.1m) to Gore businesses than the outflow (leakage) from Gore households to non-Gore businesses (\$37.4m) (Table 4.4).

TABLE 4.4: FLOWS OF TOTAL 2010 RETAIL AND HOSPITALITY SALES (EXCLUDING AUTOMOTIVE) (\$M)

		Spend Destination			Origin of Gore District Sales
		Inside Gore District	Outside Gore District	Total All Destinations	
Customer Origin	Inside Gore District	\$ 89.0	\$ 37.4	\$ 126.4	59%
	Outside Gore District	\$ 61.1			41%
	Total All Origins	\$ 150.2			100%
Destination of Gore Spend		70%	30%	100%	

Net inflow to Gore District is \$23.7m, equivalent to 19% of District demand

Food and Grocery Stores

Supermarkets and grocery stores have the smallest outflow (in percentage terms, 12%) from district residents of any store type (Table 4.5). Of total demand from within Gore District for these store types of approximately \$44.3m, only \$5.2m was spent outside of the district. This is due in large part to the plentiful supply and different brand options provided by the Countdown and New World supermarkets in Gore Central, and to the inconvenience that would result from having to travel elsewhere for (what tend to be frequent) shopping trips. In 2010, Gore District's supermarket and grocery stores had sales of just under \$51m, 77% of which came from customers inside Gore District (\$39.1m).

TABLE 4.5: FLOWS OF 2010 SUPERMARKETS AND GROCERY STORE SALES (\$M)

		Spend Destination			Origin of Gore District Sales
		Inside Gore District	Outside Gore District	Total All Destinations	
Customer Origin	Inside Gore District	\$ 39.1	\$ 5.2	\$ 44.3	77%
	Outside Gore District	\$ 11.9			23%
	Total All Origins	\$ 50.9			100%
Destination of Gore Spend		88%	12%	100%	

Net inflow to Gore District is \$6.6m, equivalent to 15% of District demand

Other Food stores have somewhat higher outflows of spend by Gore residents, with one third (34%) of their spend going to Other Food businesses outside of the District (mostly in Invercargill) (Table 4.6). However this outflow is more than balanced by a large inflow from non-District residents (\$7.6m), who account for more than two-thirds (66%) of sales made by Gore District Other Food outlets. This high level of non-local custom shows the attractiveness of Gore to people living in surrounding areas relative to that of their local centres in which supply/choice is very limited.

TABLE 4.6: FLOWS OF 2010 OTHER FOOD STORES SALES (\$M)

		Spend Destination			Origin of Gore District Sales
		Inside Gore District	Outside Gore District	Total All Destinations	
Customer Origin	Inside Gore District	\$ 3.9	\$ 2.1	\$ 6.0	34%
	Outside Gore District	\$ 7.6			66%
	Total All Origins	\$ 11.5			100%
Destination of Gore Spend		66%	34%	100%	

Net inflow to Gore District is \$5.6m, equivalent to 93% of District demand

Comparison Retail Stores

Gore District residents are less likely to spend locally in comparison retail stores than in food retail stores. This is due in large part to the limited comparison range available in Gore compared to larger centres elsewhere (e.g. Invercargill and Dunedin), which means that consumers with a particular brand preference are less likely to find the brand/product they want in Gore, and be more likely to travel to source it outside of Gore. Further, comparison retail products are purchased less frequently than food, which means it is less onerous to direct this infrequent spend outside of Gore than is the case for more regular (weekly/fortnightly) food shops.

The limited supply of comparison retail is evident in apparel and accessory stores, in which sector there is an outflow of \$5.7m from Gore District or two-thirds (65%) of Gore District residents' spend (Table 4.7). There is however an inflow of \$2.6m of sales in these store types from outside of the district which account for 45% of district sales.

TABLE 4.7: FLOWS OF 2010 APPAREL AND ACCESSORIES SALES (\$M)

		Spend Destination			Origin of Gore District Sales
		Inside Gore District	Outside Gore District	Total All Destinations	
Customer Origin	Inside Gore District	\$ 3.1	\$ 5.7	\$ 8.8	55%
	Outside Gore District	\$ 2.6			45%
	Total All Origins	\$ 5.7			100%
Destination of Gore Spend		35%	65%	100%	

Net outflow from Gore District is \$3.1m, equivalent to 36% of District demand

Similar trends exist in Furniture, Housewares and Appliances stores, with Gore having only a very limited attraction to Clutha and Southland residents who provide 18% of Gore sales in this category, compared to around half of the sales in most other categories. This indicates that while Gore might be the closest retail centre for those people, the limited supply/range in Gore is insufficient to attract them and they choose to go further afield for what tend to be only infrequently purchased goods (Table 4.8). In 2010, Furniture, Housewares and Appliances stores in Gore District has sales of \$7.6m (82% of which was from customers within the district). In contrast, there was demand of nearly \$11m for these store types arising from within the district (43% of which was spent elsewhere).

TABLE 4.8: FLOWS OF 2010 FURNITURE, HOUSEWARES AND APPLIANCES SALES (\$M)

		Spend Destination			Origin of Gore District Sales
		Inside Gore District	Outside Gore District	Total All Destinations	
Customer Origin	Inside Gore District	\$ 6.3	\$ 4.8	\$ 11.0	82%
	Outside Gore District	\$ 1.4			18%
	Total All Origins	\$ 7.6			100%
Destination of Gore Spend		57%	43%	100%	

Net outflow from Gore District is \$3.4m, equivalent to 31% of District demand

There is a large (\$14.8m) *net* inflow of spend in department stores to Gore (\$18.4m flowing into Gore department stores from outside of the district less leakage of \$3.6m). This is mostly due to the 'lumpiness' of supply in this category, with no department stores in many towns forcing all demand towards the few examples that do exist, such as The Warehouse in Gore. This means that leakage from Gore residents' spend is low (at 20%), and the inflow from non-Gore residents is high (they provide 57% of department store sales in Gore) (Table 4.9).

TABLE 4.9: FLOWS OF 2010 DEPARTMENT STORE SALES (\$M)

		Spend Destination			Origin of Gore District Sales
		Inside Gore District	Outside Gore District	Total All Destinations	
Customer Origin	Inside Gore District	\$ 14.0	\$ 3.6	\$ 17.6	43%
	Outside Gore District	\$ 18.4			57%
	Total All Origins	\$ 32.4			100%
Destination of Gore Spend		80%	20%	100%	

Net inflow to Gore District is \$14.8m, equivalent to 84% of District demand

Demand in Other Comparison retail stores is less focussed on Gore than is the case for department stores due to the greater range in other locations. The *net* inflow to Gore is \$1.5m, and demand and supply are broadly balanced in this storetype (Table 4.10).

TABLE 4.10: FLOWS OF 2010 OTHER COMPARISON RETAIL STORE SALES (\$M)

		Spend Destination			Origin of Gore District Sales
		Inside Gore District	Outside Gore District	Total All Destinations	
Customer Origin	Inside Gore District	\$ 12.0	\$ 7.2	\$ 19.3	58%
	Outside Gore District	\$ 8.8			42%
	Total All Origins	\$ 20.8			100%
Destination of Gore Spend		63%	37%	100%	

Net inflow to Gore District is \$1.5m, equivalent to 8% of District demand

Other Storetypes

Half of the 2010 spend at Gore District's hospitality outlets comes from locals (\$10.6m), and half from those resident outside the District (\$10.6m), giving a total annual sales estimate for these store types of \$21.2m. District residents direct only slightly more than half (54%) of their spend to local businesses, which, at a District-level, means that demand and supply are only 9% different, with a small \$1.7m *net* inflow of spend into the District (Table 4.11).

TABLE 4.11: FLOWS OF 2010 HOSPITALITY OUTLET SALES (\$M)

		Spend Destination			Origin of Gore District Sales
		Inside Gore District	Outside Gore District	Total All Destinations	
Customer Origin	Inside Gore District	\$ 10.6	\$ 8.9	\$ 19.5	50%
	Outside Gore District	\$ 10.6			50%
	Total All Origins	\$ 21.2			100%
Destination of Gore Spend		54%	46%	100%	

Net inflow to Gore District is \$1.7m, equivalent to 9% of District demand

Gore District is a focus for spend in the automotive sector, both from fuel retail and automotive sectors, with a large (\$36.0m) *net* inflow of spend, equivalent to 76% of District demand. More than half of 2010 sales in the sector are made to non-locals (55%), despite leakage from locals being among the lowest of any storetype at 21% (Table 4.12). This indicates the attractiveness of Gore businesses in the sector, both from the range of supply they offer and from the lower levels of supply elsewhere.

TABLE 4.12: FLOWS OF 2010 AUTOMOTIVE (FUEL AND SERVICES) SALES (\$M)

		Spend Destination			Origin of Gore District Sales
		Inside Gore District	Outside Gore District	Total All Destinations	
Customer Origin	Inside Gore District	\$ 37.6	\$ 9.8	\$ 47.4	45%
	Outside Gore District	\$ 45.8			55%
	Total All Origins	\$ 83.4			100%
Destination of Gore Spend		79%	21%	100%	

Net inflow to Gore District is \$36.0m, equivalent to 76% of District demand

5. Gore District Economic Futures Model

5.1 Introduction

This section of the report provides a summary of the current economy and future economic outlook for Gore District. It integrates the most recent available information on the long term economic outlook, tourism and district population. It is based on a core analytical tool developed by M.E called the **Economic Futures Model** (EFM ©, v2010) which examines prospects by economic sector across the whole economy. A Gore District EFM has been specifically developed for this Economic and Social Work Stream of the GEMS.

The EFM is a tool for understanding the implications of economic growth and the drivers of that growth. For this GEMS phase one research, M.E has used the EFM to demonstrate the current economy and future economic outlook of the Gore District between 2007 (base year) and 2031 based broadly on a **Business as Usual (BAU)** scenario. That is, a growth scenario based on a continuation (within a low-to-high range) of recent trends.

In future phases of the GEMS, the EFM can be utilised to enable a range of growth scenarios (alternate futures) to be evaluated and compared against the BAU and each other.

5.2 Total Economy and Outlook

The key economic indicators incorporated in the EFM include population and the implied resident labour force, employment, gross output³¹ (\$m) and value added³² (\$m). Factors influencing demand in the EFM include household consumption, exports (including international tourism consumption), and gross fixed capital formation³³. The EFM is based on a fully interconnected framework, with demand influenced not only by the relationship (inputs and outputs) between industry sectors but also between the Gore District, the rest of Southland Region and the rest of New Zealand.

Key aspects to consider when interpreting EFM results include:

- The EFM is not a forecast (prediction) of economic growth. It is a projection of economic growth based on assumptions for a number of interconnected parameters (scenarios).
- The raw BAU scenario is not supply constrained. Its key purpose is to highlight potential constraints or criticalities to achieving a particular rate of growth. Therefore, it is important that economic indicators are not considered in isolation, but in relation to all the growth indicators.

³¹ Gross output represents, the total value of sales by producing enterprises (their turnover) in an accounting period (e.g. a year), before subtracting the value of intermediate goods used up in production. Flows and imputations (e.g. commodity taxes) relating to government services and households are also included.

³² The amount added to goods and services by the contributions of capital and labour (i.e., the value of output after the cost of bought-in materials and services has been deducted). Value added is a similar measure to GDP but less the value of taxes (incl. GST).

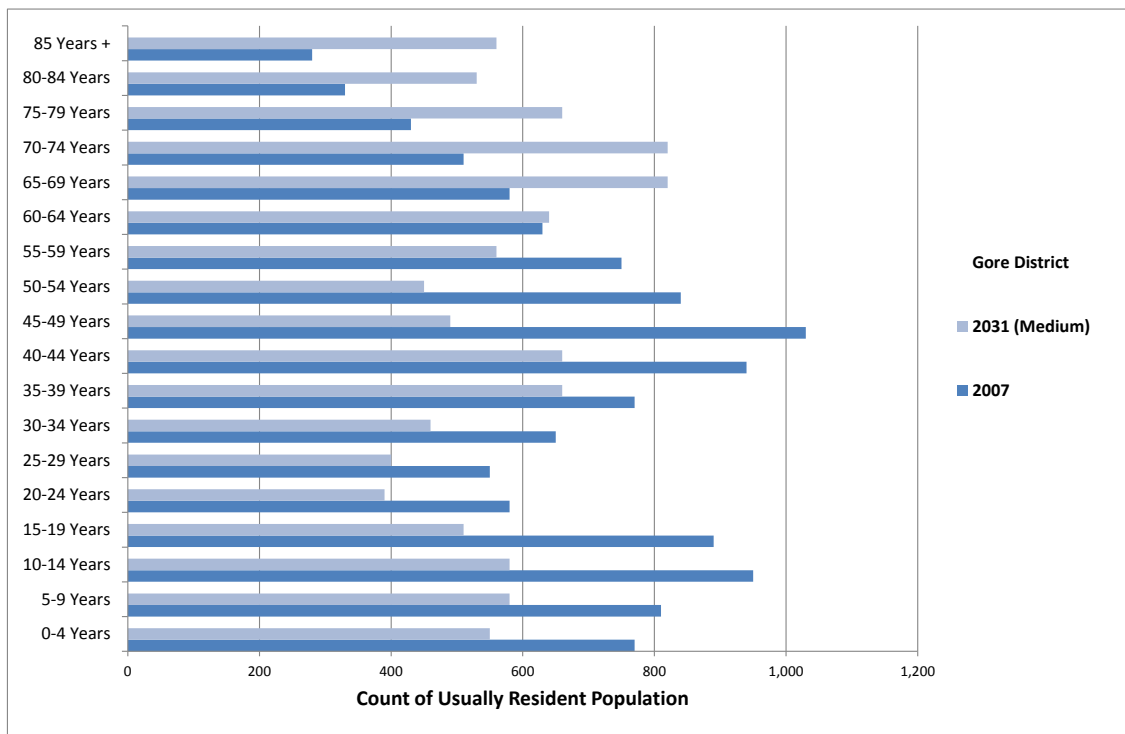
³³ Gross fixed capital formation (GFCF) is a measure of the net new investment by producers on durable real assets, such as buildings, motor vehicles, plant and machinery, roading, and improvements to land. In measuring the outlays, sales of similar goods are deducted. Land is excluded from gross fixed capital formation.

5.3 Population Growth

Based on Statistics NZ estimates, the Gore District had a usually resident population of 12,290 in the year ending (YE) June 2007. Under a medium growth rate, that population is estimated to decrease to 10,320 by 2031 (a decline of 1,970 people (16%) or 0.7% per annum) as a result of out-migration, particularly among younger people³⁴.

As well as a declining population, Figure 5.1 demonstrates the ageing of the population over that time period. The net economic effect will be fewer people consuming goods and services, and a greater proportion of those people in the lower-consuming age brackets (e.g. 65+) than currently and with some associated shift in retail and service preferences. Typically, the 'retired' are likely to spend less on retail goods (reflecting their small household size and reduced discretionary income) and more on health services.

FIGURE 5.1: GORE DISTRICT POPULATION BY AGE BRACKET 2007 AND 2031 (MEDIUM)



5.4 Summary Economic Indicator Growth

Table 5.1 summarises all of the key economic indicators measured by the EFM, including total population. Focussing on the medium growth outlook³⁵, under the BAU scenario the Gore District could see total gross output increase by \$441m (33%) from \$1.66bn in 2007 to \$2.10bn in 2031 and

³⁴ The usually resident population projections (and employment figures) may vary from those contained in the Spatial Framework Database. While both sourced from Statistics NZ, EFM figures are derived off a 2007 estimate base.

³⁵ The medium outlook assumes medium population, export and gross fixed capital formation growth rates in Gore District, the rest of the region and in the rest of the country.

generating total growth in value added of approximately \$117m (25%). This represents a 49% increase in value added per capita, showing that growth will be driven by improving productivity despite a decreasing local population.

TABLE 5.1: GORE DISTRICT ECONOMIC INIDATOR GROWTH SUMMARY (BAU)

	2007	2011 (f)	2016 (f)	2021 (f)	2026 (f)	2031 (f)	2007-31 (n)	2007-31 (%)	2007-31 (% pa)
Gore District Low									
UR Population	12,290	11,760	11,160	10,520	9,800	9,080	-3,210	-26%	-1.3%
Labour Force **	8,210	7,970	7,510	6,870	6,110	5,260	-2,950	-36%	-1.8%
Labour Force as % Population	67%	68%	67%	65%	62%	58%	-9%	-13%	-0.6%
Employment (ECs)	6,580	6,590	6,560	6,530	6,480	6,380	-200	-3%	-0.1%
EC/Capita	0.54	0.56	0.59	0.62	0.66	0.70	0.17	31%	1.1%
EC as % Labour Force	80%	83%	87%	95%	106%	121%	41%	51%	1.7%
Employment (MECs)	7,760	7,930	7,950	7,930	7,890	7,820	60	1%	0.0%
MEC/Capita	0.63	0.67	0.71	0.75	0.81	0.86	0.23	36%	1.3%
MEC as % Labour Force	95%	99%	106%	115%	129%	149%	54%	57%	1.9%
Value Added (\$M)	\$ 473	\$ 492	\$ 509	\$ 527	\$ 540	\$ 547	\$ 74	16%	0.6%
Value Added/Capita (\$)	\$ 38,490	\$ 41,840	\$ 45,610	\$ 50,100	\$ 55,100	\$ 60,240	\$ 21,750	57%	1.9%
Value Added/EC (\$)	\$ 71,880	\$ 74,660	\$ 77,590	\$ 80,700	\$ 83,330	\$ 85,740	\$ 13,860	19%	0.7%
Value Added/MEC (\$)	\$ 60,950	\$ 62,040	\$ 64,030	\$ 66,460	\$ 68,440	\$ 69,950	\$ 9,000	15%	0.6%
Output (\$M) *	\$ 1,658	\$ 1,716	\$ 1,786	\$ 1,844	\$ 1,895	\$ 1,938	\$ 280	17%	0.7%
Output/Capita (\$)	\$ 134,910	\$ 145,920	\$ 160,040	\$ 175,290	\$ 193,370	\$ 213,440	\$ 78,530	58%	1.9%
Output/EC (\$)	\$ 251,980	\$ 260,390	\$ 272,260	\$ 282,390	\$ 292,440	\$ 303,760	\$ 51,780	21%	0.8%
Output/MEC (\$)	\$ 213,660	\$ 216,390	\$ 224,650	\$ 232,530	\$ 240,180	\$ 247,830	\$ 34,170	16%	0.6%
Gore District Medium									
UR Population	12,290	12,010	11,680	11,300	10,870	10,320	-1,970	-16%	-0.7%
Labour Force **	8,210	8,110	7,790	7,270	6,760	6,040	-2,170	-26%	-1.3%
Labour Force as % Population	67%	68%	67%	64%	62%	59%	-8%	-12%	-0.5%
Employment (ECs)	6,580	6,690	6,790	6,850	6,900	6,910	330	5%	0.2%
EC/Capita	0.535	0.557	0.581	0.606	0.635	0.670	0.134	25%	0.9%
EC as % Labour Force	80%	82%	87%	94%	102%	114%	34%	43%	1.5%
Employment (MECs)	7,760	8,020	8,170	8,330	8,390	8,430	670	9%	0.3%
MEC/Capita	0.631	0.668	0.699	0.737	0.772	0.817	0.185	29%	1.1%
MEC as % Labour Force	95%	99%	105%	115%	124%	140%	45%	48%	1.6%
Value Added (\$M)	\$ 473	\$ 498	\$ 524	\$ 550	\$ 572	\$ 590	\$ 117	25%	0.9%
Value Added/Capita (\$)	\$ 38,490	\$ 41,470	\$ 44,860	\$ 48,670	\$ 52,620	\$ 57,170	\$ 18,680	49%	1.7%
Value Added/EC (\$)	\$ 71,880	\$ 74,440	\$ 77,170	\$ 80,290	\$ 82,900	\$ 85,380	\$ 13,500	19%	0.7%
Value Added/MEC (\$)	\$ 60,950	\$ 62,090	\$ 64,140	\$ 66,030	\$ 68,180	\$ 69,990	\$ 9,040	15%	0.6%
Output (\$M) *	\$ 1,658	\$ 1,739	\$ 1,841	\$ 1,938	\$ 2,029	\$ 2,099	\$ 441	27%	1.0%
Output/Capita (\$)	\$ 134,910	\$ 144,800	\$ 157,620	\$ 171,500	\$ 186,660	\$ 203,390	\$ 68,480	51%	1.7%
Output/EC (\$)	\$ 251,980	\$ 259,940	\$ 271,130	\$ 282,920	\$ 294,060	\$ 303,760	\$ 51,780	21%	0.8%
Output/MEC (\$)	\$ 213,660	\$ 216,830	\$ 225,340	\$ 232,650	\$ 241,840	\$ 248,990	\$ 35,330	17%	0.6%
Gore District High									
UR Population	12,290	12,310	12,190	12,090	11,880	11,590	-700	-6%	-0.2%
Labour Force **	8,210	8,250	8,060	7,740	7,350	6,810	-1,400	-17%	-0.8%
Labour Force as % Population	67%	67%	66%	64%	62%	59%	-8%	-12%	-0.5%
Employment (ECs)	6,580	6,770	6,990	7,190	7,360	7,460	880	13%	0.5%
EC/Capita	0.54	0.55	0.57	0.59	0.62	0.64	0.11	20%	0.8%
EC as % Labour Force	80%	82%	87%	93%	100%	110%	29%	37%	1.3%
Employment (MECs)	7,760	8,090	8,400	8,690	8,940	9,120	1,360	18%	0.7%
MEC/Capita	0.63	0.66	0.69	0.72	0.75	0.79	0.16	25%	0.9%
MEC as % Labour Force	95%	98%	104%	112%	122%	134%	39%	42%	1.5%
Value Added (\$M)	\$ 473	\$ 503	\$ 540	\$ 576	\$ 612	\$ 641	\$ 168	36%	1.3%
Value Added/Capita (\$)	\$ 38,490	\$ 40,860	\$ 44,300	\$ 47,640	\$ 51,520	\$ 55,310	\$ 16,820	44%	1.5%
Value Added/EC (\$)	\$ 71,880	\$ 74,300	\$ 77,250	\$ 80,110	\$ 83,150	\$ 85,920	\$ 14,040	20%	0.7%
Value Added/MEC (\$)	\$ 60,950	\$ 62,180	\$ 64,290	\$ 66,280	\$ 68,460	\$ 70,290	\$ 9,340	15%	0.6%
Output (\$M) *	\$ 1,658	\$ 1,761	\$ 1,899	\$ 2,033	\$ 2,158	\$ 2,275	\$ 617	37%	1.3%
Output/Capita (\$)	\$ 134,910	\$ 143,050	\$ 155,780	\$ 168,160	\$ 181,650	\$ 196,290	\$ 61,380	45%	1.6%
Output/EC (\$)	\$ 251,980	\$ 260,120	\$ 271,670	\$ 282,750	\$ 293,210	\$ 304,960	\$ 52,980	21%	0.8%
Output/MEC (\$)	\$ 213,660	\$ 217,680	\$ 226,070	\$ 233,950	\$ 241,390	\$ 249,450	\$ 35,790	17%	0.6%

* Includes final demand sectors

** Labour force is based on usually resident population aged 15-69 years inclusive.

A key implication of an ageing population structure is that the labour force decreases in size relative to the total population (Table 5.1). This means fewer people available to work to serve the needs of the population. This is a relevant issue for the Gore District given the labour intensive nature of the economy, with the primary sector, manufacturing and retail sectors dominant. Under the medium growth outlook, the labour force (measured in this case as those aged 15-69 years who are employed full or part time or unemployed) decreases from 8,210 in 2007 to 6,040 in 2031, which represents a declining share of the total population that is in the labour force from 67% of the district population in 2007 to 59% in 2031.

In total employment terms (measured as the employee count plus an estimate of working proprietors not counted as employees: Modified Employment Count or MEC), the Gore District economy has a MEC/capita rate higher than the national average with approximately 63 persons employed in the district for every 100 district residents compared to approximately 53 for every 100 residents nationally. In comparison with the labour force, the 2007 figures show 95 persons employed in the district for every 100 residents in the Gore District labour force compared to 75 for every 100 residents in the labour force at the national level.

The key influence on the high ratios of employees to population, and employees to labour force is the role that Gore District plays in the sub-regional economy. The district attracts a significant influx of workers, with a fifth (20%) of the Gore District workforce resident outside the district. According to the 2006 Census Travel to Work survey, 9% or just under 450 of employed residents travel outside of the district to work (mostly to Southland District followed by Invercargill City). This compares to nearly 1,120 employees travelling into Gore district for work. Approximately half of those originate from Southland District and a fifth each originating from Clutha District and Invercargill City. This is a net influx in 2006 of approximately 670 workers (Appendix 5).

As shown in section 4 (for the retail sector), Gore functions as a sub-regional service centre for the wider population's retail needs, and it is likely therefore, that a significant portion of the retail spending by non-district residents occurs in combination with work trips to the district.

Under these BAU assumptions of the EFM, total employment in Gore District will increase from 7,760 in 2007 to 8,430 in 2031. This represents total growth of 670 persons employed or 9% over that period or 0.3% per annum (Medium outlook) (Figure 5.2). Under a low growth BAU scenario, employment would be very similar in 2031 compared to 2007 (growth of just 1%) and under a high growth BAU scenario, employment would be 18% higher by 2031 (growth of 1,360 persons employed). These employment projections account for the net effect of a declining population (with subsequent reduced demand for goods and services), increases in employment productivity (which means less staff required to achieve the same levels of output) and also the demands of those export driven sectors which are expected to show continued growth despite local economic decline.

Figure 5.3 summarises the key economic indicator medium growth rates (indexed) for the Gore District from 2007 to 2031.

FIGURE 5.2: GORE DISTRICT FINAL BAU EMPLOYMENT GROWTH (MEC) 2007-2031

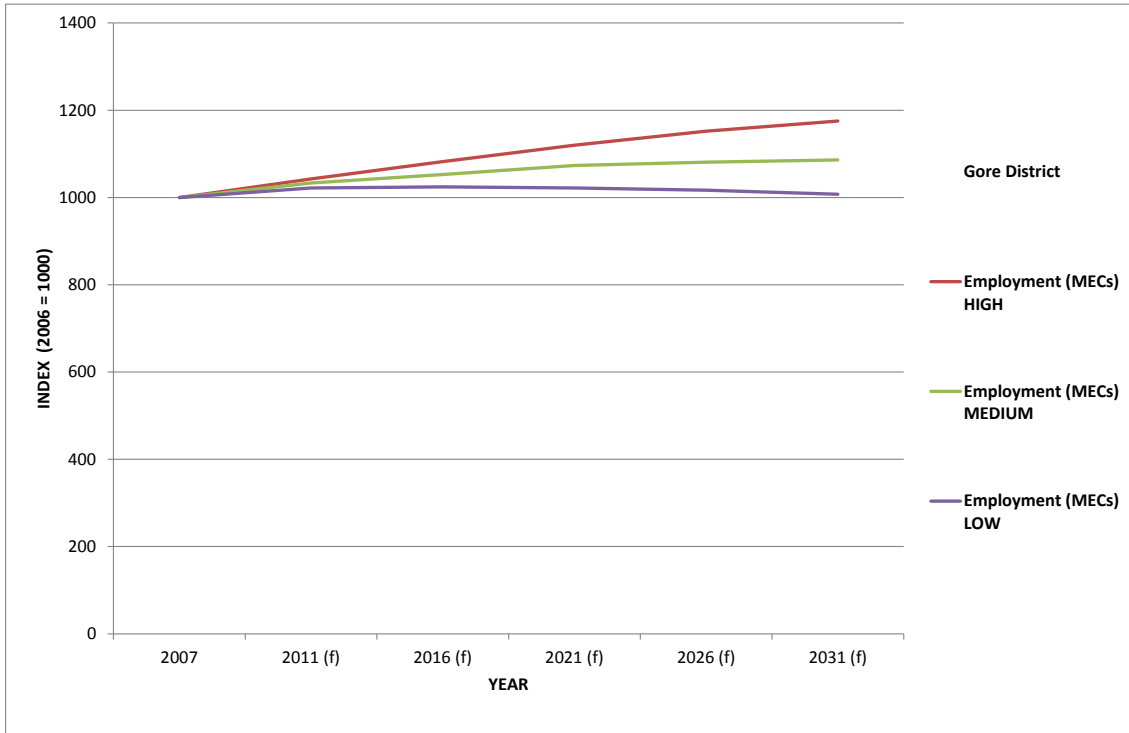
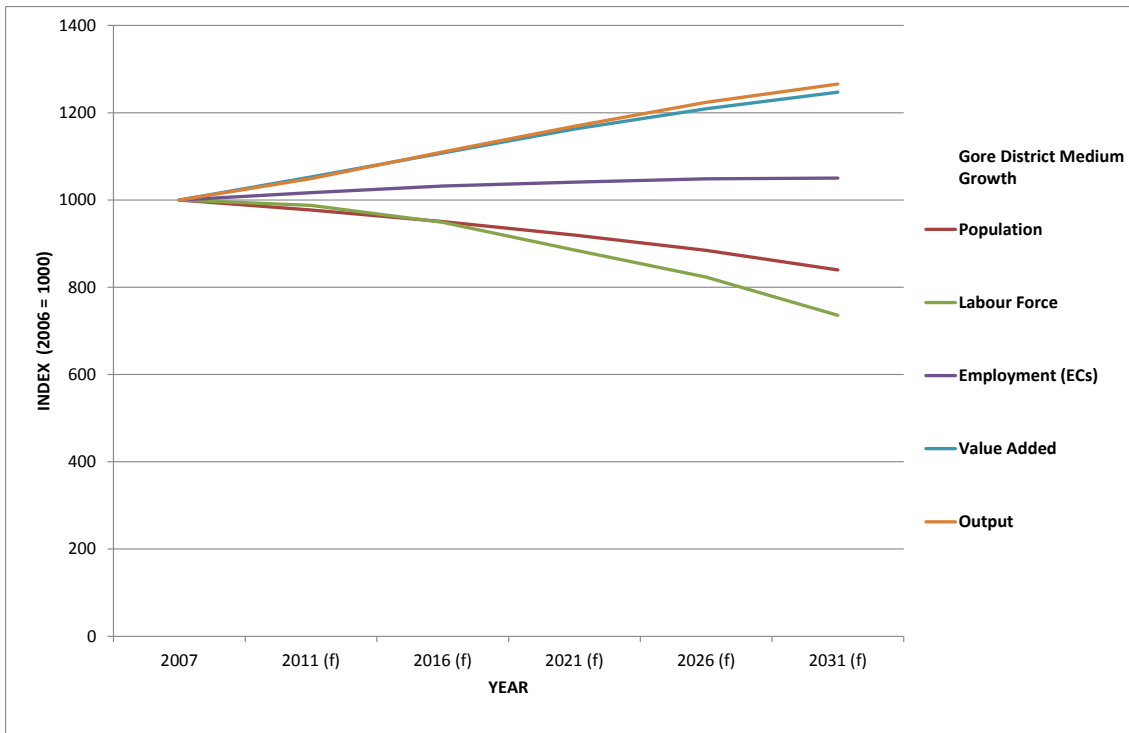


FIGURE 5.3: GORE DISTRICT ECONOMIC INDICATOR GROWTH SUMMARY INDEX (MEDIUM BAU) 2007-2031



5.5 Economic Indicators in a Wider Context

Table 5.2 compares the BAU scenario growth in gross output (\$m) in the Gore District against the rest of Southland Region, the total Southland Region, the Rest of New Zealand and total New Zealand. Based on the BAU scenario medium growth outlook, the Gore District would experience a 27% increase in gross output between 2007 and 2031. This rate of growth is slightly lower than the regional average (29%), and much lower than the national average (46%). In 2007, the Gore District accounted for 14% of Southland Region's gross output, a figure which is expected to remain steady out to 2031 under this scenario. Overall, the Gore District would account for 12% of total regional growth in gross output over the period and just 0.2% of growth nationally.

Table 5.3 compares the BAU scenario growth of the value added (\$m) component of gross output in the Gore District against the region and nation. Based on the BAU scenario medium growth outlook, the Gore District would experience a 25% increase in value added between 2007 and 2031. This rate of growth is slightly lower than the regional average (27%) and significantly lower than the national average (45%). In 2007, the Gore District accounted for 13% of the value added in the Southland Region's economy, and this is expected to remain steady to 2031 under this scenario. Overall, the Gore District would account for 12% of total regional growth in value added over the period and just 0.2% of growth nationally.

TABLE 5.2: GORE DISTRICT GROSS OUTPUT GROWTH SUMMARY IN CONTEXT (MEDIUM BAU)

Output (\$M)	2007	2011 (f)	2016 (f)	2021 (f)	2026 (f)	2031 (f)	2007-31 (n)	2007-31 (%)	2007-31 (% pa)
Low									
Gore District	1,658	1,716	1,786	1,844	1,895	1,938	280	17%	0.7%
Rest of Southland Region	10,478	10,818	11,255	11,631	11,937	12,173	1,695	16%	0.6%
Region	12,136	12,534	13,041	13,475	13,832	14,111	1,975	16%	0.6%
Rest of New Zealand	544,207	581,815	624,335	663,575	699,409	731,913	187,706	34%	1.2%
Total New Zealand	556,343	594,349	637,376	677,050	713,241	746,024	189,681	34%	1.2%
<i>Gore District as % Region</i>	<i>14%</i>	<i>14%</i>	<i>14%</i>	<i>14%</i>	<i>14%</i>	<i>14%</i>	<i>14%</i>	<i>104%</i>	<i>104%</i>
<i>Gore District as % New Zealand</i>	<i>0.3%</i>	<i>0.3%</i>	<i>0.3%</i>	<i>0.3%</i>	<i>0.3%</i>	<i>0.3%</i>	<i>0.1%</i>	<i>50%</i>	<i>53%</i>
Medium									
Gore District	1,658	1,739	1,841	1,938	2,029	2,099	441	27%	1.0%
Rest of Southland Region	10,478	11,046	11,754	12,416	13,022	13,567	3,089	29%	1.1%
Region	12,136	12,785	13,595	14,354	15,051	15,666	3,530	29%	1.1%
Rest of New Zealand	544,207	590,908	645,004	697,406	747,664	795,866	251,659	46%	1.6%
Total New Zealand	556,343	603,693	658,599	711,760	762,715	811,532	255,189	46%	1.6%
<i>Gore District as % Region</i>	<i>14%</i>	<i>14%</i>	<i>14%</i>	<i>14%</i>	<i>13%</i>	<i>13%</i>	<i>12%</i>	<i>91%</i>	<i>92%</i>
<i>Gore District as % New Zealand</i>	<i>0.3%</i>	<i>0.3%</i>	<i>0.3%</i>	<i>0.3%</i>	<i>0.3%</i>	<i>0.3%</i>	<i>0.2%</i>	<i>58%</i>	<i>62%</i>
High									
Gore District	1,658	1,761	1,899	2,033	2,158	2,275	617	37%	1.3%
Rest of Southland Region	10,478	11,275	12,275	13,245	14,176	15,076	4,598	44%	1.5%
Region	12,136	13,036	14,174	15,278	16,334	17,351	5,215	43%	1.5%
Rest of New Zealand	544,207	600,227	666,575	733,316	799,745	865,972	321,765	59%	2.0%
Total New Zealand	556,343	613,263	680,749	748,594	816,079	883,323	326,980	59%	1.9%
<i>Gore District as % Region</i>	<i>14%</i>	<i>14%</i>	<i>13%</i>	<i>13%</i>	<i>13%</i>	<i>13%</i>	<i>12%</i>	<i>87%</i>	<i>88%</i>
<i>Gore District as % New Zealand</i>	<i>0.3%</i>	<i>0.3%</i>	<i>0.3%</i>	<i>0.3%</i>	<i>0.3%</i>	<i>0.3%</i>	<i>0.2%</i>	<i>63%</i>	<i>68%</i>

TABLE 5.3: GORE DISTRICT VALUE ADDED GROWTH SUMMARY IN CONTEXT (MEDIUM BAU)

<i>Value Added (\$M)</i>	<i>2007</i>	<i>2011 (f)</i>	<i>2016 (f)</i>	<i>2021 (f)</i>	<i>2026 (f)</i>	<i>2031 (f)</i>	<i>2007-31 (n)</i>	<i>2007-31 (%)</i>	<i>2007-31 (% pa)</i>
Low									
Gore District	473	492	509	527	540	547	74	16%	0.6%
Rest of Southland Region	3,035	3,123	3,239	3,333	3,409	3,463	428	14%	0.6%
Region	3,508	3,615	3,748	3,860	3,949	4,010	502	14%	0.6%
Rest of New Zealand	148,523	158,979	170,330	180,776	190,277	198,863	50,340	34%	1.2%
Total New Zealand	152,031	162,594	174,078	184,636	194,226	202,873	50,842	33%	1.2%
<i>Gore District as % Region</i>	<i>13%</i>	<i>14%</i>	<i>14%</i>	<i>14%</i>	<i>14%</i>	<i>14%</i>	<i>15%</i>	<i>109%</i>	<i>109%</i>
<i>Gore District as % New Zealand</i>	<i>0.3%</i>	<i>0.3%</i>	<i>0.3%</i>	<i>0.3%</i>	<i>0.3%</i>	<i>0.3%</i>	<i>0.1%</i>	<i>47%</i>	<i>50%</i>
Medium									
Gore District	473	498	524	550	572	590	117	25%	0.9%
Rest of Southland Region	3,035	3,191	3,379	3,559	3,717	3,857	822	27%	1.0%
Region	3,508	3,689	3,903	4,109	4,289	4,447	939	27%	1.0%
Rest of New Zealand	148,523	161,385	175,781	189,738	203,108	215,927	67,404	45%	1.6%
Total New Zealand	152,031	165,074	179,684	193,847	207,397	220,374	68,343	45%	1.6%
<i>Gore District as % Region</i>	<i>13%</i>	<i>13%</i>	<i>13%</i>	<i>13%</i>	<i>13%</i>	<i>13%</i>	<i>12%</i>	<i>92%</i>	<i>93%</i>
<i>Gore District as % New Zealand</i>	<i>0.3%</i>	<i>0.3%</i>	<i>0.3%</i>	<i>0.3%</i>	<i>0.3%</i>	<i>0.3%</i>	<i>0.2%</i>	<i>55%</i>	<i>59%</i>
High									
Gore District	473	503	540	576	612	641	168	36%	1.3%
Rest of Southland Region	3,035	3,256	3,526	3,788	4,041	4,285	1,250	41%	1.4%
Region	3,508	3,759	4,066	4,364	4,653	4,926	1,418	40%	1.4%
Rest of New Zealand	148,523	163,844	181,474	199,232	216,924	234,586	86,063	58%	1.9%
Total New Zealand	152,031	167,603	185,540	203,596	221,577	239,512	87,481	58%	1.9%
<i>Gore District as % Region</i>	<i>13%</i>	<i>13%</i>	<i>13%</i>	<i>13%</i>	<i>13%</i>	<i>13%</i>	<i>12%</i>	<i>88%</i>	<i>89%</i>
<i>Gore District as % New Zealand</i>	<i>0.3%</i>	<i>0.3%</i>	<i>0.3%</i>	<i>0.3%</i>	<i>0.3%</i>	<i>0.3%</i>	<i>0.2%</i>	<i>62%</i>	<i>67%</i>

5.6 Economic Indicators by Sector

This section provides a summary of the BAU scenario growth projection for gross output and total employment in Gore District at the industry and/or 48 sector level, under a medium growth outlook. Figure 5.4 shows a larger economy in 2031 in terms of gross output by each industry, but with a similar structure. In other words, all industries will experience growth over time and will be bigger than they are today. As the drivers of the Gore District economy are unlikely to change under a BAU scenario (i.e. the strong primary and manufacturing focus) the activity mix will be much the same in the future.

In saying that, by 2031 the Primary industry will play a slightly bigger role (i.e., account for a slightly bigger portion of total economic activity) in 2031 than it does currently, moving from 17% to 20% of district gross output. Primary industries are driven less by population growth *and* more by exports, so are less subject to Gore District’s declining population than many other sectors.

A more detailed breakdown (48 sectors) is contained in Table 5.4 and Table 5.5 shows the associated employment projections for this medium BAU scenario at the 48 sector level.

FIGURE 5.4: GORE DISTRICT GROSS OUTPUT GROWTH SUMMARY BY INDUSTRY (MEDIUM BAU)

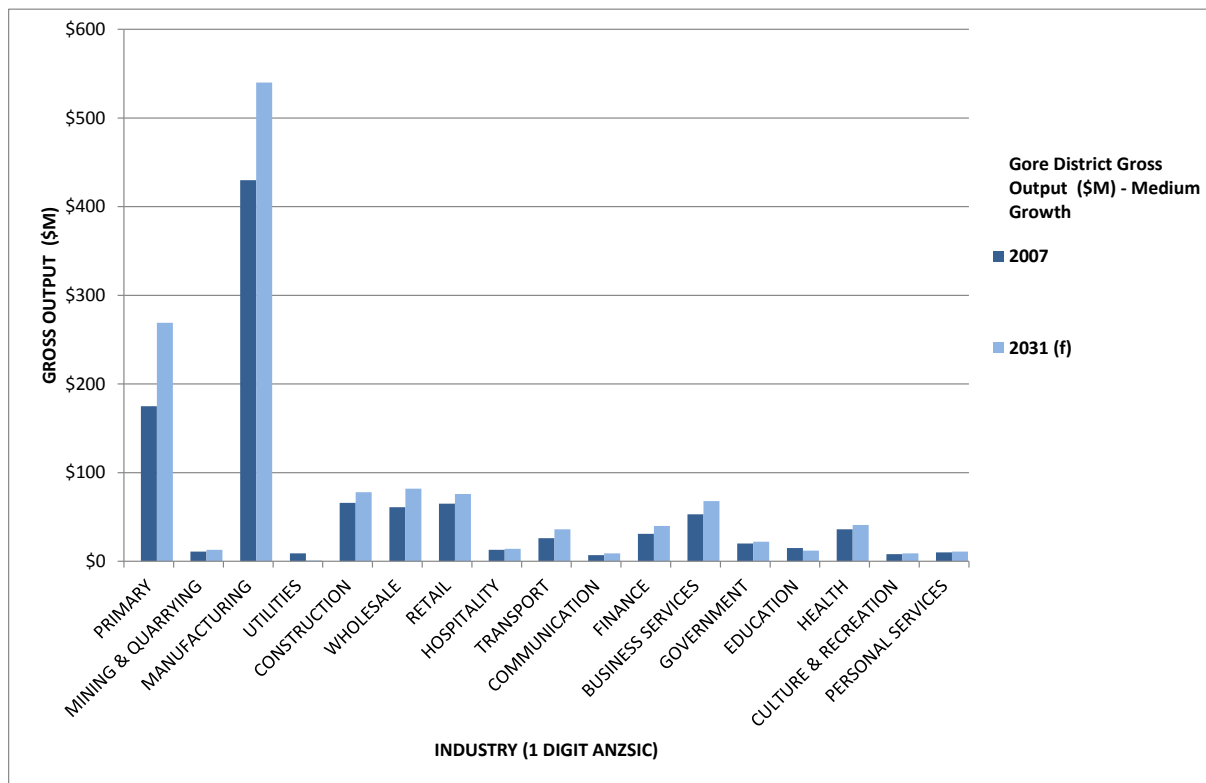


TABLE 5.4: GORE DISTRICT GROSS OUTPUT GROWTH SUMMARY BY SECTOR (MEDIUM BAU) (\$M)

Code	Sector	2007	2011 (f)	2016 (f)	2021 (f)	2026 (f)	2031 (f)	2007-11	2007-16	2007-21	2007-26	2007-31	2007-11	2007-16	2007-21	2007-26	2007-31	
Gore District - MEDIUM (\$M)																		
1	Horticulture and fruit growing	\$ 5	\$ 5	\$ 5	\$ 6	\$ 6	\$ 6	\$ -	\$ -	\$ 1	\$ 1	\$ 1	0%	0%	20%	20%	20%	
2	Livestock and cropping farming	\$ 102	\$ 121	\$ 134	\$ 146	\$ 157	\$ 167	\$ 19	\$ 32	\$ 44	\$ 55	\$ 65	19%	31%	43%	54%	64%	
3	Dairy cattle farming	\$ 38	\$ 39	\$ 42	\$ 45	\$ 48	\$ 50	\$ 1	\$ 4	\$ 7	\$ 10	\$ 12	3%	11%	18%	26%	32%	
4	Other farming	\$ 5	\$ 5	\$ 6	\$ 7	\$ 8	\$ 8	\$ -	\$ 1	\$ 2	\$ 3	\$ 3	0%	20%	40%	60%	60%	
5	Services to agriculture, hunting and trapping	\$ 17	\$ 19	\$ 22	\$ 25	\$ 28	\$ 30	\$ 2	\$ 5	\$ 8	\$ 11	\$ 13	12%	29%	47%	65%	76%	
6	Forestry and logging	\$ 8	\$ 8	\$ 8	\$ 8	\$ 8	\$ 8	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%	0%	0%	
7	Fishing	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%	0%	0%	
8	Mining and quarrying	\$ 11	\$ 12	\$ 12	\$ 12	\$ 13	\$ 13	\$ 1	\$ 1	\$ 1	\$ 2	\$ 2	9%	9%	9%	18%	18%	
9	Oil and gas exploration and extraction	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%	0%	0%	
10	Meat and meat product manufacturing	\$ 371	\$ 377	\$ 403	\$ 427	\$ 450	\$ 470	\$ 6	\$ 32	\$ 56	\$ 79	\$ 99	2%	9%	15%	21%	27%	
11	Dairy product manufacturing	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%	0%	0%	
12	Other food manufacturing	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%	0%	0%	
13	Beverage, malt and tobacco manufacturing	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%	0%	0%	
14	Textile and apparel manufacturing	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%	0%	0%	
15	Wood product manufacturing	\$ 26	\$ 23	\$ 23	\$ 24	\$ 24	\$ 24	\$ -3	\$ -3	\$ -2	\$ -2	\$ -2	-12%	-12%	-8%	-8%	-8%	
16	Paper and paper product manufacturing	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%	0%	0%	
17	Printing, publishing and recorded media	\$ 3	\$ 3	\$ 3	\$ 4	\$ 4	\$ 4	\$ -	\$ -	\$ 1	\$ 1	\$ 1	0%	0%	33%	33%	33%	
18	Petroleum and industrial chemical manufacturing	\$ 3	\$ 4	\$ 4	\$ 4	\$ 5	\$ 5	\$ 1	\$ 1	\$ 1	\$ 2	\$ 2	33%	33%	33%	67%	67%	
19	Rubber, plastic and other chemical product manufacturing	\$ 2	\$ 2	\$ 2	\$ 2	\$ 2	\$ 2	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%	0%	0%	
20	Non-metallic mineral product manufacturing	\$ 5	\$ 5	\$ 5	\$ 6	\$ 6	\$ 6	\$ -	\$ -	\$ 1	\$ 1	\$ 1	0%	0%	20%	20%	20%	
21	Basic metal manufacturing	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%	0%	0%	
22	Structural, sheet, and fabricated metal product manuf	\$ 9	\$ 9	\$ 10	\$ 10	\$ 11	\$ 11	\$ -	\$ 1	\$ 1	\$ 2	\$ 2	0%	11%	11%	22%	22%	
23	Transport equipment manufacturing	\$ 1	\$ 1	\$ 1	\$ 1	\$ 1	\$ 1	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%	0%	0%	
24	Machinery and equipment manufacturing	\$ 8	\$ 9	\$ 11	\$ 12	\$ 14	\$ 15	\$ 1	\$ 3	\$ 4	\$ 6	\$ 7	13%	38%	50%	75%	88%	
25	Furniture and other manufacturing	\$ 2	\$ 2	\$ 2	\$ 2	\$ 2	\$ 2	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%	0%	0%	
26	Electricity generation and supply	\$ 8	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -8	\$ -8	\$ -8	\$ -8	\$ -8	-100%	-100%	-100%	-100%	-100%	
27	Gas supply	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%	0%	0%	
28	Water supply	\$ 1	\$ 1	\$ 1	\$ 1	\$ 1	\$ 1	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%	0%	0%	
29	Construction	\$ 66	\$ 77	\$ 77	\$ 78	\$ 78	\$ 78	\$ 11	\$ 11	\$ 11	\$ 12	\$ 12	17%	17%	17%	18%	18%	
30	Wholesale trade	\$ 61	\$ 67	\$ 72	\$ 76	\$ 80	\$ 82	\$ 6	\$ 11	\$ 15	\$ 19	\$ 21	10%	18%	25%	31%	34%	
31	Retail trade	\$ 65	\$ 68	\$ 70	\$ 73	\$ 74	\$ 76	\$ 3	\$ 5	\$ 8	\$ 9	\$ 11	5%	8%	12%	14%	17%	
32	Accommodation, restaurants and bars	\$ 13	\$ 13	\$ 13	\$ 14	\$ 14	\$ 14	\$ -	\$ -	\$ 1	\$ 1	\$ 1	0%	0%	8%	8%	8%	
33	Road transport	\$ 23	\$ 24	\$ 26	\$ 28	\$ 30	\$ 32	\$ 1	\$ 3	\$ 5	\$ 7	\$ 9	4%	13%	22%	30%	39%	
34	Water and rail transport	\$ 1	\$ 1	\$ 1	\$ 1	\$ 1	\$ 1	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%	0%	0%	
35	Air transport, services to transport and storage	\$ 2	\$ 2	\$ 2	\$ 3	\$ 3	\$ 3	\$ -	\$ -	\$ 1	\$ 1	\$ 1	0%	0%	50%	50%	50%	
36	Communication services	\$ 7	\$ 8	\$ 8	\$ 8	\$ 9	\$ 9	\$ 1	\$ 1	\$ 1	\$ 2	\$ 2	14%	14%	14%	29%	29%	
37	Finance	\$ 25	\$ 27	\$ 29	\$ 30	\$ 31	\$ 32	\$ 2	\$ 4	\$ 5	\$ 6	\$ 7	8%	16%	20%	24%	28%	
38	Insurance	\$ 2	\$ 2	\$ 2	\$ 2	\$ 2	\$ 3	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%	0%	50%	
39	Services to finance and investment	\$ 4	\$ 4	\$ 5	\$ 5	\$ 5	\$ 5	\$ -	\$ 1	\$ 1	\$ 1	\$ 1	0%	25%	25%	25%	25%	
40	Real estate	\$ 29	\$ 30	\$ 31	\$ 32	\$ 33	\$ 33	\$ 1	\$ 2	\$ 3	\$ 4	\$ 4	3%	7%	10%	14%	14%	
41	Ownership of owner-occupied dwellings	\$ 26	\$ 26	\$ 26	\$ 26	\$ 26	\$ 25	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%	0%	-4%	
42	Business services	\$ 24	\$ 26	\$ 29	\$ 31	\$ 33	\$ 35	\$ 2	\$ 5	\$ 7	\$ 9	\$ 11	8%	21%	29%	38%	46%	
43	Central government admin, defence, public order & safety	\$ 10	\$ 10	\$ 10	\$ 10	\$ 10	\$ 10	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%	0%	0%	
44	Local government administration services and civil defence	\$ 10	\$ 11	\$ 11	\$ 11	\$ 11	\$ 12	\$ 1	\$ 1	\$ 1	\$ 1	\$ 2	10%	10%	10%	10%	20%	
45	Education	\$ 15	\$ 14	\$ 13	\$ 13	\$ 12	\$ 12	\$ -1	\$ -2	\$ -2	\$ -3	\$ -3	-7%	-13%	-13%	-20%	-20%	
46	Health and community services	\$ 36	\$ 36	\$ 38	\$ 39	\$ 41	\$ 41	\$ -	\$ 2	\$ 3	\$ 5	\$ 5	0%	6%	8%	14%	14%	
47	Cultural and recreational services	\$ 8	\$ 8	\$ 8	\$ 8	\$ 9	\$ 9	\$ -	\$ -	\$ -	\$ 1	\$ 1	0%	0%	0%	13%	13%	
48	Personal and other community services	\$ 10	\$ 10	\$ 11	\$ 11	\$ 11	\$ 11	\$ -	\$ 1	\$ 1	\$ 1	\$ 1	0%	10%	10%	10%	10%	
TOTAL		\$ 1,062	\$ 1,109	\$ 1,176	\$ 1,240	\$ 1,301	\$ 1,346	\$ 47	\$ 114	\$ 178	\$ 239	\$ 284	4%	11%	17%	23%	27%	
FINAL DEMAND (HOUSEHOLD SECTOR)		\$ 596	\$ 630	\$ 665	\$ 698	\$ 728	\$ 753	\$ 34	\$ 69	\$ 102	\$ 132	\$ 157	6%	12%	17%	22%	26%	
TOTAL INCLUDING FINAL DEMAND		\$ 1,658	\$ 1,739	\$ 1,841	\$ 1,938	\$ 2,029	\$ 2,099	\$ 81	\$ 183	\$ 280	\$ 371	\$ 441	5%	11%	17%	22%	27%	

TABLE 5.5: GORE DISTRICT TOTAL EMPLOYMENT (MEC) GROWTH SUMMARY BY SECTOR (MEDIUM BAU)

Code	Sector	2007	2011 (f)	2016 (f)	2021 (f)	2026 (f)	2031 (f)	2007-11	2007-16	2007-21	2007-26	2007-31	2007-11	2007-16	2007-21	2007-26	2007-31	
Gore District - MEDIUM																		
1	Horticulture and fruit growing	70	70	70	70	70	70	-	-	-	-	-	0%	0%	0%	0%	0%	
2	Livestock and cropping farming	520	610	670	720	760	800	90	150	200	240	280	17%	29%	38%	46%	54%	
3	Dairy cattle farming	220	220	230	240	250	260	-	10	20	30	40	0%	5%	9%	14%	18%	
4	Other farming	30	30	30	30	40	40	-	-	-	10	10	0%	0%	0%	33%	33%	
5	Services to agriculture, hunting and trapping	240	250	260	270	280	290	10	20	30	40	50	4%	8%	13%	17%	21%	
6	Forestry and logging	20	10	10	10	10	10	-10	-10	-10	-10	-10	-50%	-50%	-50%	-50%	-50%	
7	Fishing	-	-	-	-	-	-	-	-	-	-	-	0%	0%	0%	0%	0%	
8	Mining and quarrying	30	30	30	30	30	30	-	-	-	-	-	0%	0%	0%	0%	0%	
9	Oil and gas exploration and extraction	-	-	-	-	-	-	-	-	-	-	-	0%	0%	0%	0%	0%	
10	Meat and meat product manufacturing	1,270	1,260	1,290	1,320	1,340	1,350	-10	20	50	70	80	-1%	2%	4%	6%	6%	
11	Dairy product manufacturing	-	-	-	-	-	-	-	-	-	-	-	0%	0%	0%	0%	0%	
12	Other food manufacturing	-	-	-	-	-	-	-	-	-	-	-	0%	0%	0%	0%	0%	
13	Beverage, malt and tobacco manufacturing	-	-	-	-	-	-	-	-	-	-	-	0%	0%	0%	0%	0%	
14	Textile and apparel manufacturing	-	-	-	-	-	-	-	-	-	-	-	0%	0%	0%	0%	0%	
15	Wood product manufacturing	140	120	120	120	110	110	-20	-20	-20	-30	-30	-14%	-14%	-14%	-21%	-21%	
16	Paper and paper product manufacturing	-	-	-	-	-	-	-	-	-	-	-	0%	0%	0%	0%	0%	
17	Printing, publishing and recorded media	30	30	30	30	30	30	-	-	-	-	-	0%	0%	0%	0%	0%	
18	Petroleum and industrial chemical manufacturing	10	10	10	10	10	10	-	-	-	-	-	0%	0%	0%	0%	0%	
19	Rubber, plastic and other chemical product manufacturing	10	10	10	10	10	10	-	-	-	-	-	0%	0%	0%	0%	0%	
20	Non-metallic mineral product manufacturing	20	20	20	20	20	20	-	-	-	-	-	0%	0%	0%	0%	0%	
21	Basic metal manufacturing	-	-	-	-	-	-	-	-	-	-	-	0%	0%	0%	0%	0%	
22	Structural, sheet, and fabricated metal product manuf	50	50	50	50	50	50	-	-	-	-	-	0%	0%	0%	0%	0%	
23	Transport equipment manufacturing	-	-	-	-	-	-	-	-	-	-	-	0%	0%	0%	0%	0%	
24	Machinery and equipment manufacturing	50	50	60	60	60	70	-	10	10	10	20	0%	20%	20%	20%	40%	
25	Furniture and other manufacturing	10	10	10	10	10	10	-	-	-	-	-	0%	0%	0%	0%	0%	
26	Electricity generation and supply	-	-	-	-	-	-	-	-	-	-	-	0%	0%	0%	0%	0%	
27	Gas supply	-	-	-	-	-	-	-	-	-	-	-	0%	0%	0%	0%	0%	
28	Water supply	-	-	-	-	-	-	-	-	-	-	-	0%	0%	0%	0%	0%	
29	Construction	360	410	410	400	400	400	50	50	40	40	40	14%	14%	11%	11%	11%	
30	Wholesale trade	270	280	280	270	270	260	10	10	-	-	10	4%	4%	0%	0%	-4%	
31	Retail trade	1,010	1,000	960	920	870	820	-10	-50	-90	-140	-190	-1%	-5%	-9%	-14%	-19%	
32	Accommodation, restaurants and bars	300	290	300	310	310	310	-10	-	10	10	10	-3%	0%	3%	3%	3%	
33	Road transport	230	230	250	260	280	290	-	20	30	50	60	0%	9%	13%	22%	26%	
34	Water and rail transport	-	-	-	-	-	-	-	-	-	-	-	0%	0%	0%	0%	0%	
35	Air transport, services to transport and storage	10	10	10	10	10	10	-	-	-	-	-	0%	0%	0%	0%	0%	
36	Communication services	20	20	10	10	10	10	-	-	10	10	10	0%	-50%	-50%	-50%	-50%	
37	Finance	90	90	90	80	80	80	-	-	10	10	10	0%	0%	-11%	-11%	-11%	
38	Insurance	10	10	10	10	10	10	-	-	-	-	-	0%	0%	0%	0%	0%	
39	Services to finance and investment	20	20	20	20	20	20	-	-	-	-	-	0%	0%	0%	0%	0%	
40	Real estate	50	50	50	50	50	50	-	-	-	-	-	0%	0%	0%	0%	0%	
41	Ownership of owner-occupied dwellings	-	-	-	-	-	-	-	-	-	-	-	0%	0%	0%	0%	0%	
42	Business services	220	240	260	280	290	310	20	40	60	70	90	9%	18%	27%	32%	41%	
43	Central government admin, defence, public order & safety	90	90	80	70	70	60	-	-	10	20	20	0%	-11%	-22%	-22%	-33%	
44	Local government administration services and civil defence	50	60	60	60	60	60	10	10	10	10	10	20%	20%	20%	20%	20%	
45	Education	350	320	300	280	270	250	-30	-50	-70	-80	-100	-9%	-14%	-20%	-23%	-29%	
46	Health and community services	600	600	620	640	650	650	-	20	40	50	50	0%	3%	7%	8%	8%	
47	Cultural and recreational services	70	80	80	80	80	80	10	10	10	10	10	14%	14%	14%	14%	14%	
48	Personal and other community services	110	110	100	100	90	80	-	-	10	10	20	0%	-9%	-9%	-18%	-27%	
TOTAL		6,580	6,690	6,790	6,850	6,900	6,910	110	210	270	320	330	2%	3%	4%	5%	5%	

6. Next Steps

This report, and associated deliverables, provides an understanding of the current economy, demographic structure and social infrastructure of the Gore District. It forms a sound and necessary basis from which future growth scenarios can be assessed. Specifically, the Spatial Framework Database, EFM and Retail spatial model described in this report have been developed in a way that, with some further modifications, can be utilised to examine the likely effects (direct and indirect) and outcomes of future development options/scenarios for the district. We anticipate that these will be generally defined as Land Use Futures for GDC, to include the various industrial developments' construction and operational phases, the consequent employment and population growth, and demands for housing, commercial space, services and facilities.

A key aspect of the evaluation will be to show where the population, business and community services growth can be located within the district, since almost all of the effects will be affected by location, and many will arise from the patterns of interaction within the economy and community.

This work will be carried out in phase two of the GGS and we anticipate defining the Land Use Futures in terms of:

- Direct employment in lignite-based and other major projects
- Workforce numbers by type (e.g. construction vs long term operation)
- Population and household numbers
- Indirect employment (retail, services, manufacturing, transport, etc) from major projects, and consequent population growth
- Future housing and residential land requirements
- Business land requirements
- Social facility capacities and needs
- Social infrastructure land and other investment requirements
- Residential growth options (by location)
- Business growth options (by location)
- Implications for town centres and neighbourhood characteristics

Because some aspects of each Land Use Future will be able to be mapped in GIS, using the platform that we have developed, it will be easy to see how different scenarios potentially impact on current features like heritage trees, heritages sites and facilities and recreational spaces (as mapped in the Social Services Database). Furthermore, the spatial location of growth will have an influence on supply and demand relationships and there will be implications for accessibility to commercial businesses and social services and facilities. This is described in more detail below.

6.1 Specific Additions to Phase Two Research

Accessibility Modelling

M.E has had preliminary discussions with Gabites Porter regarding the Gore Transport Model developed as part of the GGS phase one research. It appears possible for the spatial units underlying the Transport Model to be modified to match the Spatial Framework defined for the Economic and Social Work Stream, should that be collectively agreed to be a desirable outcome. Alternatively, it may be sufficient to develop a broad concordance so that the Transport Model could assess and report growth implications according to the precincts/neighbourhoods defined in the Spatial Framework if relevant.

As the Transport Model is compatible with GIS, we have also discussed the potential to run time and distance accessibility analyses within that Model. M.E had anticipated developing an accessibility model in the phase two work stream, but the more efficient outcome would be for M.E to work with Gabites Porter to use the Transport Model for this purpose. By importing the map files underlying the Social Services Database, current and future accessibility outcomes (by growth scenario) could be assessed in terms of each precinct/neighbourhood's access (by mode of transport) to primary/intermediate/secondary schools, hospitals, GPs, other medical and social services and recreation facilities, for example.

This analysis can help inform which future urban form options have the best accessibility outcomes and also, where new social services and facilities could be placed to maximise future accessibility for the wider community.

We recommend that these prospects be discussed further as part of the next stage of research.

School Capacity Modelling

Planning for future growth in school rolls falls generally to the Board of Trustees (BOT) of each school. Planning needs to consider the capacity of physical infrastructure (including classrooms, halls, play grounds, fields, administrative areas and car parking), as well as the capacity of teaching and support staff. Often however, BOT are not well resourced or informed to effectively plan for medium to long term growth and unless the Ministry of Education is taking an active role in long term capacity planning, as has been the case recently in parts of Auckland, situations can arise where supply does not meet demand and levels of service can suffer. This is particularly as the length of time to raise or apply for funds to pay for new infrastructure can be lengthy.

This is potentially a relevant issue for Gore's school network, particularly if a number of proposed developments not only reverse the recent trends for a declining population but then stimulate positive growth in the school aged population by attracting new families to the district. By helping Gore District schools to understand potential growth implications for school rolls and infrastructure requirements, they will be better prepared to plan and respond to that growth, in much the same

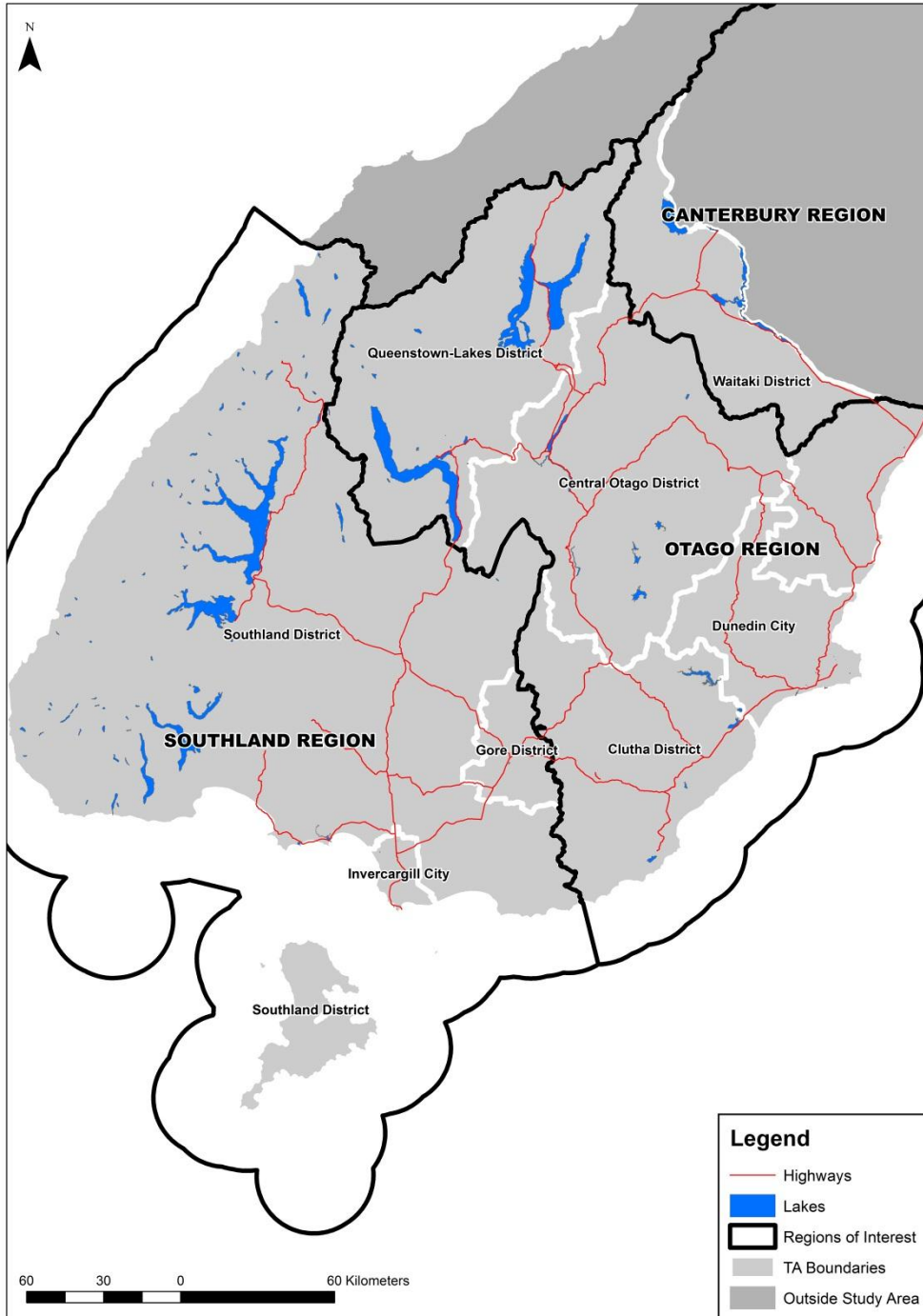
way the Council aims to prepare itself.

This can be achieved by surveying existing schools on their current and maximum roll **capacity** (based on current infrastructure) and also identifying any planned (up and coming) developments that will further increase that capacity. In this way, the remaining capacity of the existing or planned infrastructure can be identified. This can then be compared with school age population projections (by scenario) in each school's defined zone (if relevant) or catchment (based on closest school by type). Any future shortfalls in capacity can then be identified (including the year in which they might occur). This forms the basis for any recommendations to each school on how it can plan for future growth.

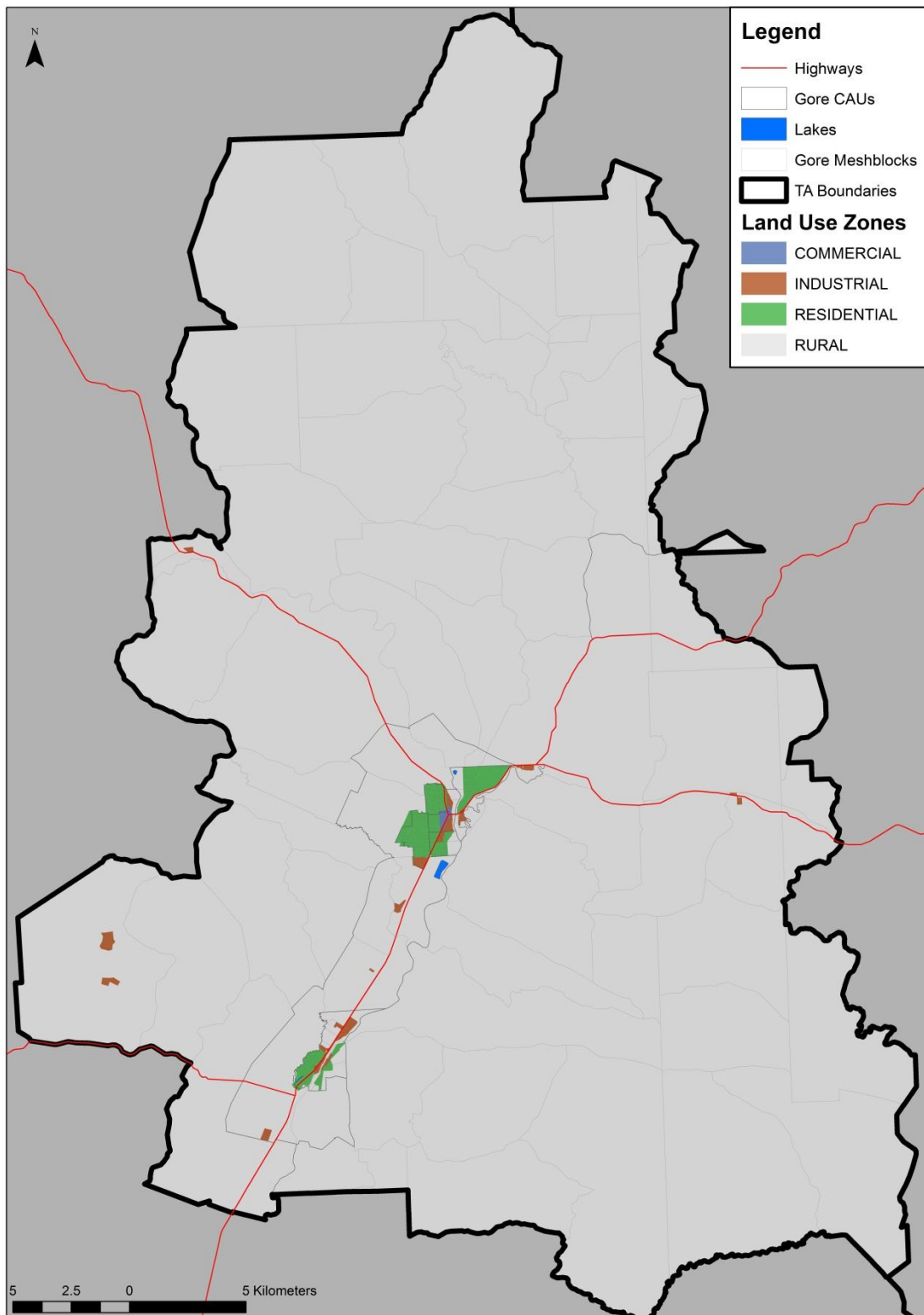
We recommend that the assessment of school capacity be discussed further as part of the next stage of research.

Appendix 1: Spatial Framework Definitions

Study Area



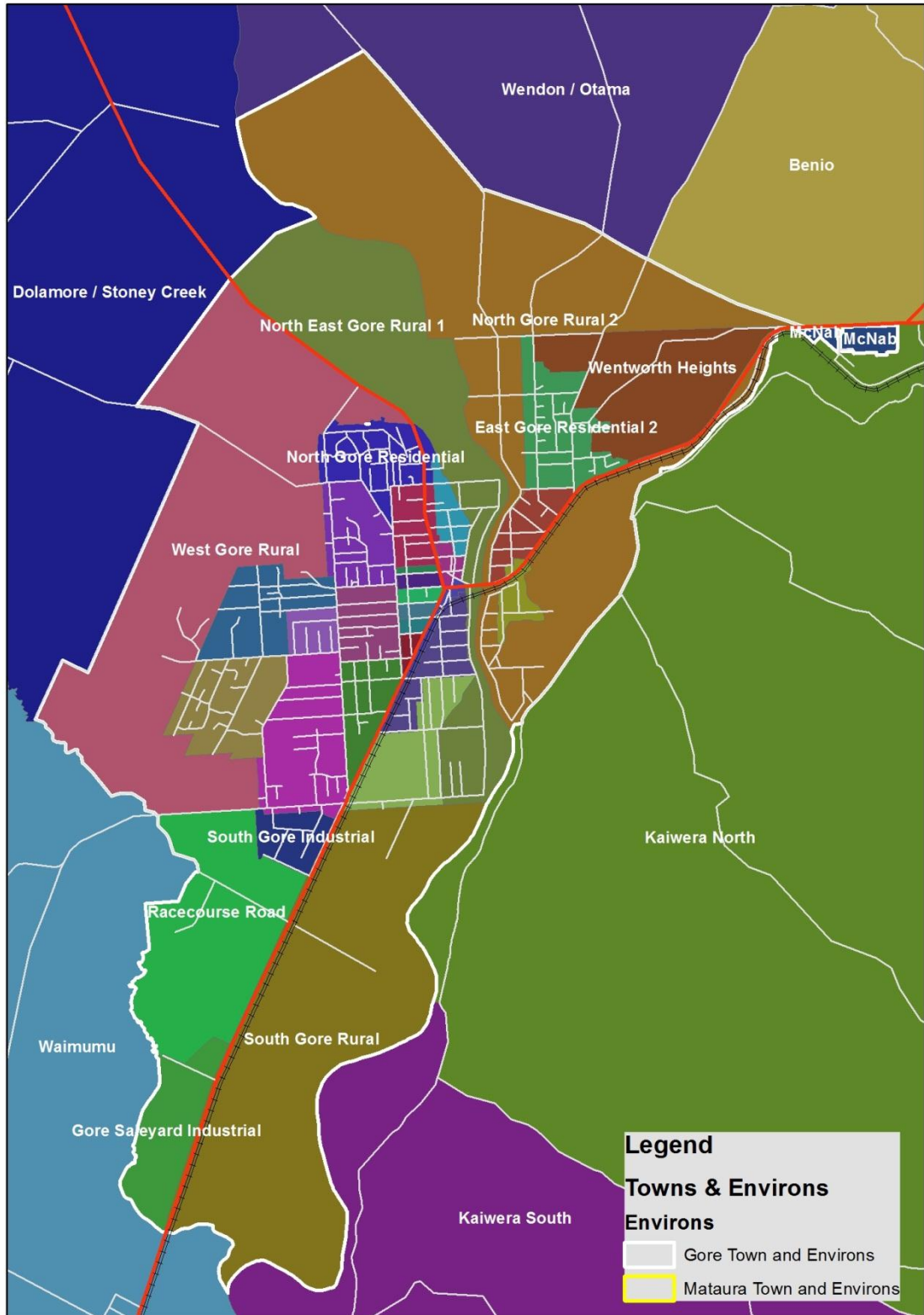
Gore District Land Use Zones – District Plan (2011)



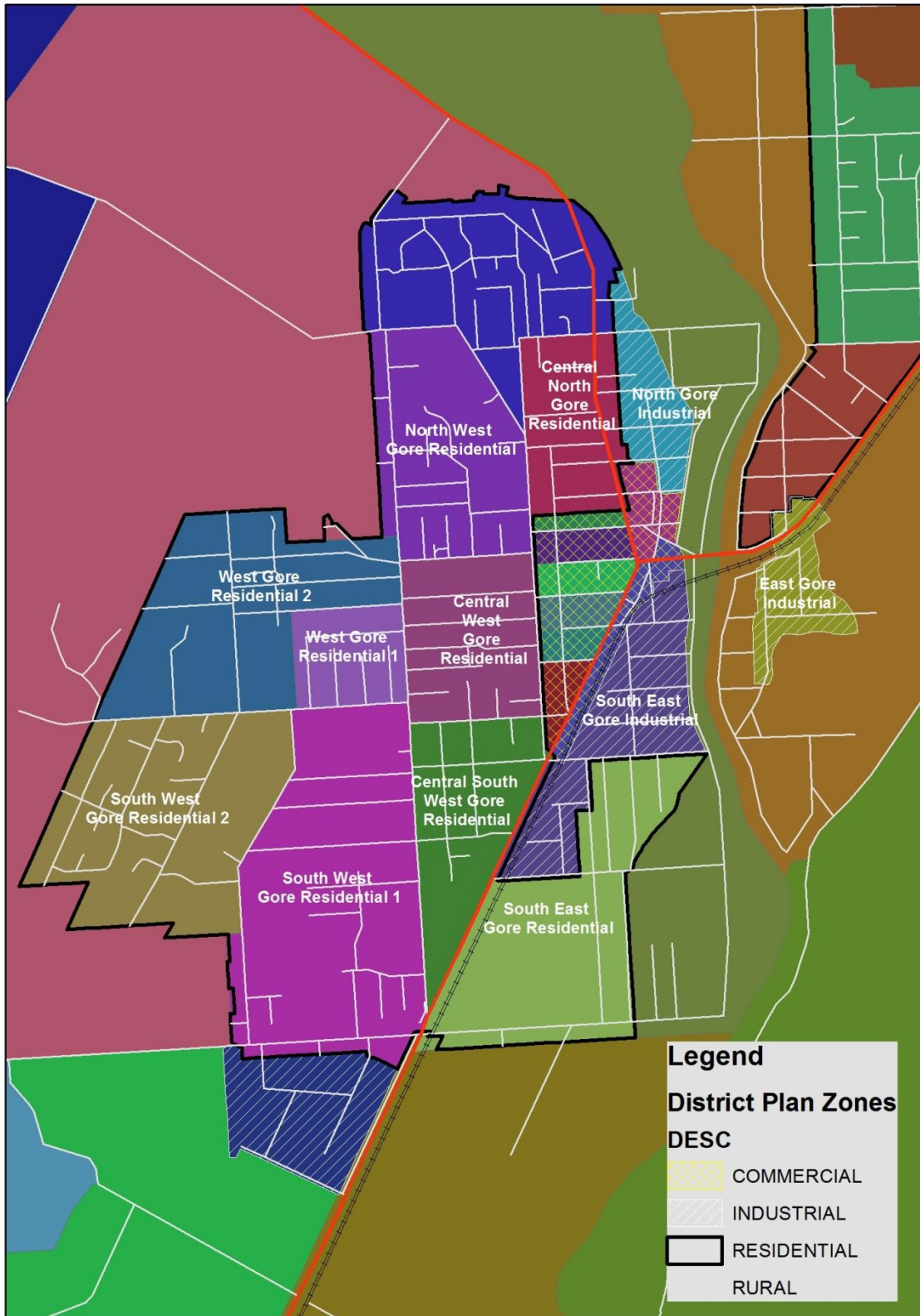
Gore District Precincts/Neighbourhoods



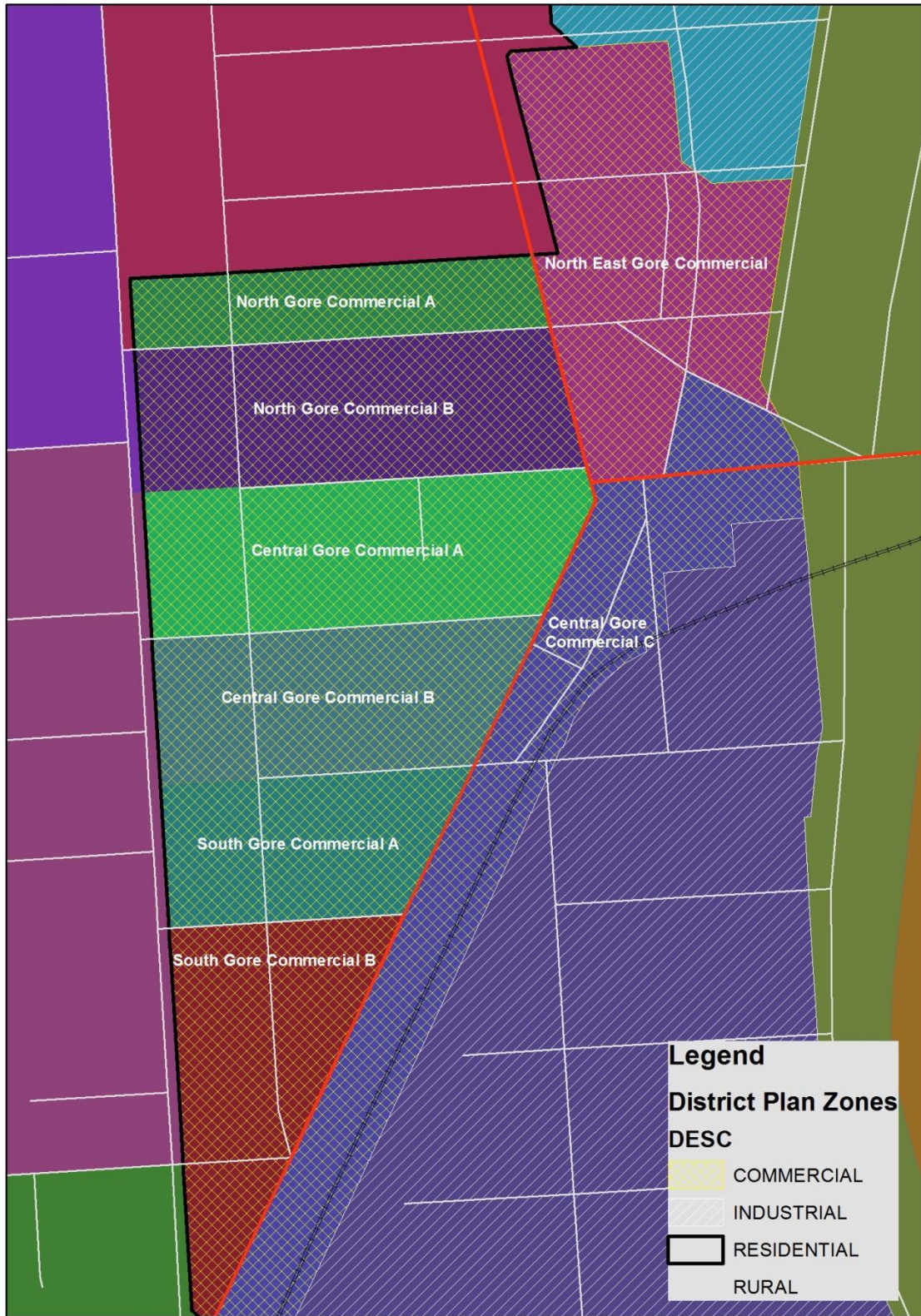
Gore Town and Environs Precincts



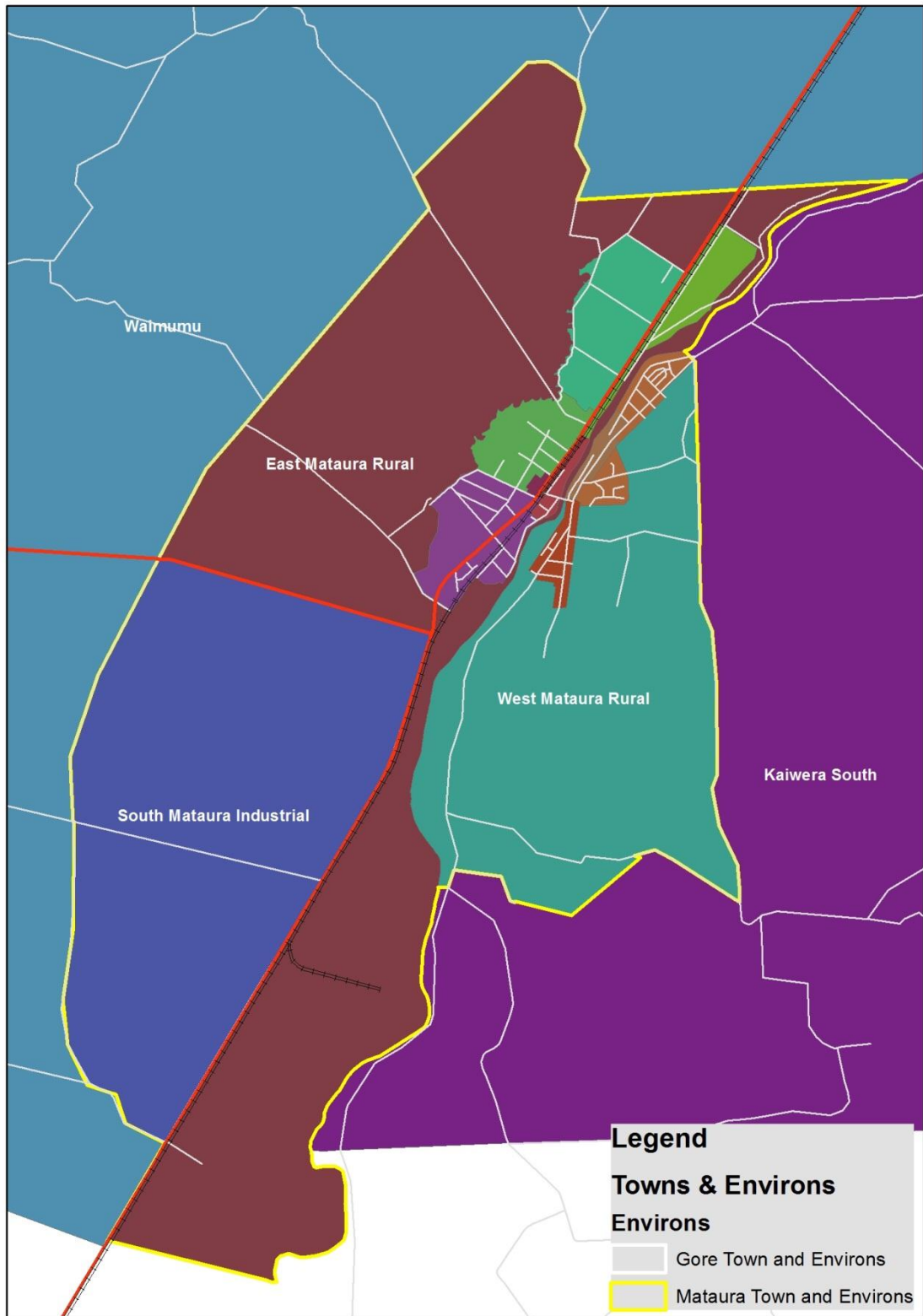
Gore Town Precincts – Non Commercial



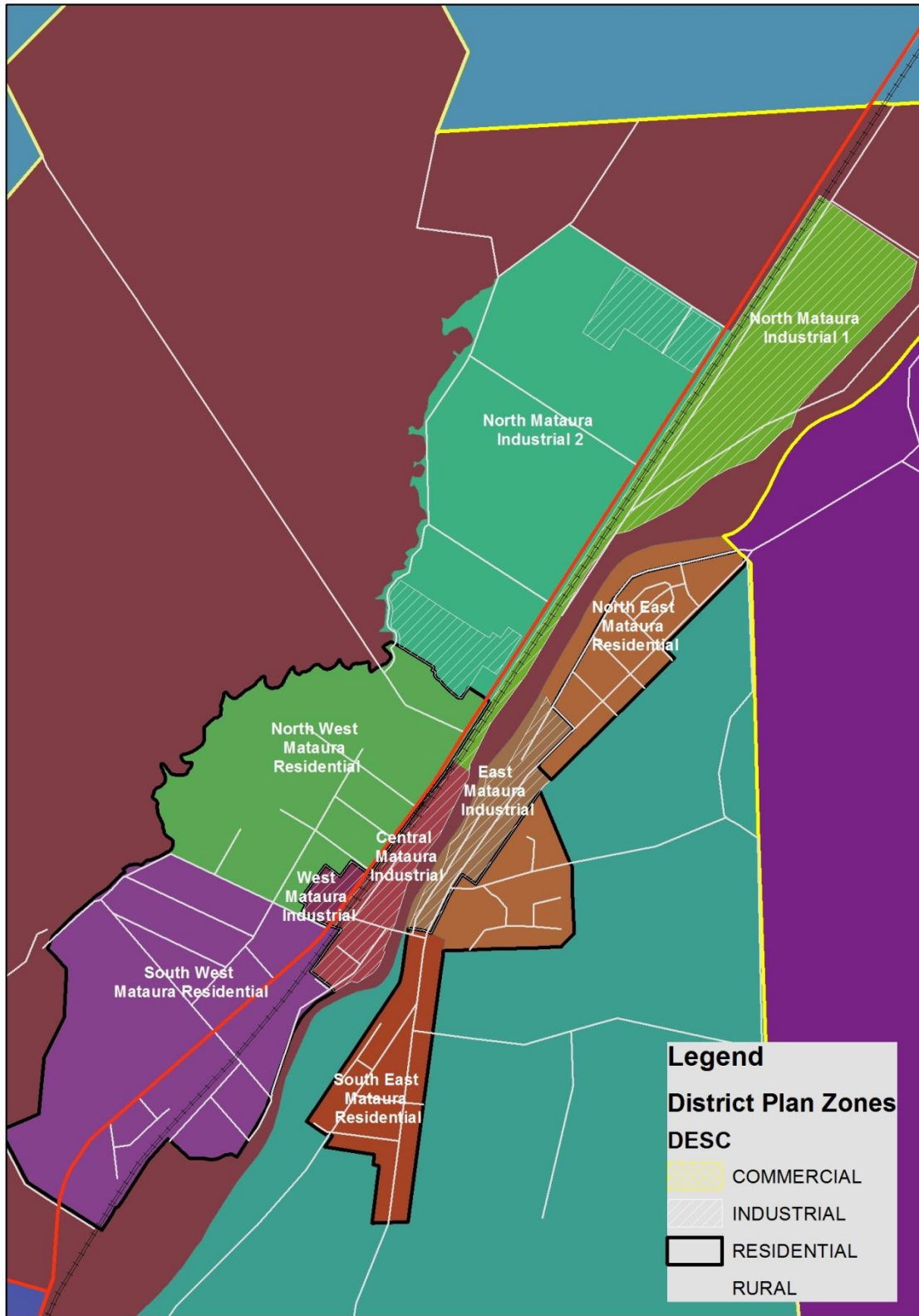
Gore Town Precincts –Commercial



Mataura Town and Environs Precincts – Outer



Mataura Town and Environs Precincts - Inner



Appendix 2 Modified Employment Counts (MECs)

Since 2004, EC has been the key measure of employment for SNZ. It is a head count of all salary and wage earners for a particular month based on IRD tax data. This is mostly employees, but can include working proprietors who pay themselves a salary or wage (i.e. are also employees). However, those working proprietors who take drawings from their business but not wages or salary are not counted in the EC due to the data collection method. Many owners of small businesses are not employees (for example - dairy owners, builders, small fishing businesses, and service business owner-operators). Thus EC by its nature is an undercount of actual employment.

Recently, statistical information has become available from the SNZ LEED system, which provides counts of the numbers of working proprietors in each sector of the economy, and some detail on the numbers of working proprietors who are not also employees. That data suggests that working proprietors who are not employees account for around 15% of total employment.

This LEED data has been utilised by M.E to develop another measure of employment, the Modified Employment Count (MEC). This includes both the Employee Count and the estimated working proprietors, to provide a more comprehensive measure of total employment, for each sector and location.

The MEC estimates are developed from:

- Linked Employer-Employee Data (LEED): Annualised employment data by industry disaggregated as to employees (E) and self-employed people (WP). Self-employed people were disaggregated further into those who pay themselves a salary or wage (S) and those who do not (N). The WP(S) persons are most likely to be *included* in the Employee Count, while the WP(N) persons are most likely to be workers *additional* to the EC.
- Business Frame (BF) data: the annualised (as at February 2011) Employee Count (EC) data. Employees (E) and self-employed people who pay themselves a salary or wage (S) identified by LEED are essentially the same as Employment Count (EC) as measured by the BF (i.e. $E + S = EC$).
- The BF data has been used to estimate the ratio (E:S) of employees (E) to working proprietor employees (WP(S)) included in the BF, and then to estimate the number of other working proprietors who are not counted by the BF (WP(N)). The ratio of total working proprietors to working proprietor employees was also calculated.
- SNZ Business Demography and LEED: The number of geographic units (business locations), by firm size³⁶ by industry.
- LEED: total self-employed persons by firm size by industry.

³⁶ Firm size groups are 0 employees, 1 to 5, 6 to 9, 10 to 19, 20 to 49, 50 to 99 and 100+ employees.

This data provided the basis to estimate the numbers of non-employee working proprietors in each industry, for each year 2000-2010, for each firm size, for each industry. The BF data on the numbers of firms (geo units) of each size by industry in each location was used to estimate the numbers of non-employee working proprietors in each industry in each location, for 2000-2011.

The output from this process is an estimate of the number of non-employee WPs for each industry and location. These estimates are added to the BF data, to provide the Modified Employment Count (MEC).

Table A3.17: Origin of Sales Supermarkets and Grocery Stores

Customer Origin	Gore Central	Rest of District	Total Gore District
Gore			
Town Centre	0%	0%	0%
Residential West	18%	13%	17%
Residential Central	12%	5%	11%
Residential North	20%	9%	19%
Urban Fringe	2%	1%	2%
Industrial	1%	1%	1%
Sub-total Gore	52%	29%	50%
Mataura			
Residential	6%	37%	9%
Industrial	1%	5%	1%
Sub-total Mataura	7%	42%	10%
Rest of District			
Industrial	1%	1%	1%
Rural East	3%	1%	3%
Rural North	8%	4%	8%
Rural West	5%	4%	5%
Sub-total Rest of District	17%	9%	17%
Outside Gore District			
Waitaki District	0%	0%	0%
Central Otago District	0%	1%	0%
Queenstown-Lakes District	0%	0%	0%
Dunedin City	0%	1%	1%
Clutha District	10%	3%	9%
Southland District	11%	9%	11%
Invercargill City	0%	4%	1%
Other Origins	1%	2%	1%
Sub-total Outside Gore District	24%	20%	23%
Total All Locations	100%	100%	100%

Table A3.18: Origin of Sales Other Food Stores

Customer Origin	Gore Central	Rest of District	Total Gore District
Gore			
Town Centre	0%	0%	0%
Residential West	7%	23%	8%
Residential Central	4%	13%	5%
Residential North	7%	26%	8%
Urban Fringe	1%	3%	1%
Industrial	0%	1%	0%
Sub-total Gore	19%	67%	21%
Mataura			
Residential	4%	8%	4%
Industrial	1%	1%	1%
Sub-total Mataura	5%	10%	5%
Rest of District			
Industrial	1%	2%	1%
Rural East	1%	3%	2%
Rural North	3%	8%	3%
Rural West	2%	6%	2%
Sub-total Rest of District	7%	19%	8%
Outside Gore District			
Waitaki District	0%	0%	0%
Central Otago District	3%	0%	3%
Queenstown-Lakes District	1%	0%	1%
Dunedin City	5%	0%	5%
Clutha District	18%	1%	17%
Southland District	30%	2%	28%
Invercargill City	7%	0%	6%
Other Origins	6%	1%	5%
Sub-total Outside Gore District	70%	5%	66%
Total All Locations	100%	100%	100%

Table A3.19: Origin of Sales Apparel and Accessories

Customer Origin	Gore Central	Rest of District	Total Gore District
Gore			
Town Centre	0%	0%	0%
Residential West	11%	11%	11%
Residential Central	9%	9%	9%
Residential North	14%	14%	14%
Urban Fringe	1%	1%	1%
Industrial	1%	1%	1%
Sub-total Gore	36%	36%	36%
Mataura			
Residential	6%	6%	6%
Industrial	1%	1%	1%
Sub-total Mataura	8%	8%	8%
Rest of District			
Industrial	1%	1%	1%
Rural East	2%	2%	2%
Rural North	5%	5%	5%
Rural West	3%	3%	3%
Sub-total Rest of District	11%	11%	11%
Outside Gore District			
Waitaki District	0%	0%	0%
Central Otago District	2%	2%	2%
Queenstown-Lakes District	2%	2%	2%
Dunedin City	1%	1%	1%
Clutha District	10%	10%	10%
Southland District	16%	16%	16%
Invercargill City	6%	6%	6%
Other Origins	8%	8%	8%
Sub-total Outside Gore District	45%	45%	45%
Total All Locations	100%	100%	100%

Table A3.20: Origin of Sales Furniture, Housewares and Appliances

Customer Origin	Gore Central	Rest of District	Total Gore District
Gore			
Town Centre	0%	0%	0%
Residential West	15%	27%	15%
Residential Central	13%	9%	12%
Residential North	23%	12%	23%
Urban Fringe	2%	3%	2%
Industrial	1%	2%	1%
Sub-total Gore	53%	52%	53%
Mataura			
Residential	9%	2%	9%
Industrial	1%	1%	1%
Sub-total Mataura	10%	3%	10%
Rest of District			
Industrial	1%	3%	1%
Rural East	3%	10%	3%
Rural North	9%	13%	9%
Rural West	6%	7%	6%
Sub-total Rest of District	19%	33%	19%
Outside Gore District			
Waitaki District	0%	0%	0%
Central Otago District	0%	0%	0%
Queenstown-Lakes District	0%	1%	0%
Dunedin City	1%	0%	1%
Clutha District	7%	7%	7%
Southland District	6%	4%	6%
Invercargill City	1%	0%	1%
Other Origins	2%	0%	2%
Sub-total Outside Gore District	18%	13%	18%
Total All Locations	100%	100%	100%

Table A3.21: Origin of Sales Department Stores

Customer Origin	Gore Central	Rest of District	Total Gore District
Gore			
Town Centre	0%	0%	0%
Residential West	9%	0%	9%
Residential Central	6%	0%	6%
Residential North	11%	0%	11%
Urban Fringe	1%	0%	1%
Industrial	0%	0%	0%
Sub-total Gore	28%	0%	28%
Mataura			
Residential	6%	0%	6%
Industrial	1%	0%	1%
Sub-total Mataura	6%	0%	6%
Rest of District			
Industrial	1%	0%	1%
Rural East	2%	0%	2%
Rural North	4%	0%	4%
Rural West	2%	0%	2%
Sub-total Rest of District	9%	0%	9%
Outside Gore District			
Waitaki District	0%	0%	0%
Central Otago District	2%	0%	2%
Queenstown-Lakes District	1%	0%	1%
Dunedin City	2%	0%	2%
Clutha District	21%	0%	21%
Southland District	22%	0%	22%
Invercargill City	2%	0%	2%
Other Origins	6%	0%	6%
Sub-total Outside Gore District	57%	0%	57%
Total All Locations	100%	0%	100%

Table A3.22: Origin of Sales Other Comparison Retail Stores

Customer Origin	Gore Central	Rest of District	Total Gore District
Gore			
Town Centre	0%	0%	0%
Residential West	9%	0%	7%
Residential Central	12%	0%	9%
Residential North	20%	0%	14%
Urban Fringe	3%	1%	2%
Industrial	1%	0%	1%
Sub-total Gore	46%	1%	32%
Mataura			
Residential	9%	16%	12%
Industrial	2%	3%	2%
Sub-total Mataura	12%	19%	14%
Rest of District			
Industrial	1%	0%	1%
Rural East	3%	1%	2%
Rural North	7%	0%	5%
Rural West	5%	1%	4%
Sub-total Rest of District	16%	2%	12%
Outside Gore District			
Waitaki District	0%	0%	0%
Central Otago District	1%	0%	1%
Queenstown-Lakes District	1%	0%	1%
Dunedin City	1%	4%	2%
Clutha District	7%	0%	5%
Southland District	13%	28%	17%
Invercargill City	1%	24%	8%
Other Origins	3%	21%	8%
Sub-total Outside Gore District	27%	77%	42%
Total All Locations	100%	100%	100%

Table A3.23: Origin of Sales Hospitality Outlets

Customer Origin	Gore Central	Rest of District	Total Gore District
Gore			
Town Centre	0%	0%	0%
Residential West	9%	16%	10%
Residential Central	6%	11%	7%
Residential North	9%	19%	11%
Urban Fringe	3%	4%	3%
Industrial	1%	1%	1%
Sub-total Gore	27%	52%	32%
Mataura			
Residential	4%	15%	6%
Industrial	1%	4%	2%
Sub-total Mataura	5%	19%	8%
Rest of District			
Industrial	1%	1%	1%
Rural East	2%	1%	2%
Rural North	4%	4%	4%
Rural West	3%	4%	3%
Sub-total Rest of District	9%	10%	10%
Outside Gore District			
Waitaki District	1%	0%	1%
Central Otago District	2%	0%	2%
Queenstown-Lakes District	2%	1%	1%
Dunedin City	7%	1%	6%
Clutha District	11%	4%	9%
Southland District	13%	5%	12%
Invercargill City	6%	3%	5%
Other Origins	16%	5%	14%
Sub-total Outside Gore District	58%	19%	50%
Total All Locations	100%	100%	100%

Table A3.24: Origin of Sales Automotive (Fuel and Services)

Customer Origin	Gore Central	Rest of District	Total Gore District
Gore			
Town Centre	0%	0%	0%
Residential West	12%	6%	10%
Residential Central	5%	5%	5%
Residential North	10%	10%	10%
Urban Fringe	2%	2%	2%
Industrial	1%	1%	1%
Sub-total Gore	30%	25%	29%
Mataura			
Residential	2%	11%	5%
Industrial	1%	6%	2%
Sub-total Mataura	3%	17%	7%
Rest of District			
Industrial	1%	1%	1%
Rural East	1%	3%	2%
Rural North	4%	6%	4%
Rural West	3%	4%	3%
Sub-total Rest of District	8%	14%	10%
Outside Gore District			
Waitaki District	0%	0%	0%
Central Otago District	2%	2%	2%
Queenstown-Lakes District	2%	1%	1%
Dunedin City	5%	4%	5%
Clutha District	13%	11%	12%
Southland District	20%	12%	18%
Invercargill City	6%	5%	6%
Other Origins	11%	7%	10%
Sub-total Outside Gore District	60%	43%	55%
Total All Locations	100%	100%	100%

Appendix 4: Retail Model Precinct Concordance

Customer Origin	Precinct Name
GORE	
Town Centre	North Gore Commercial A
	North Gore Commercial B
	North East Gore Commercial
	Central Gore Commercial A
	Central Gore Commercial C
	Central Gore Commercial B
	South Gore Commercial A
	South Gore Commercial B
Residential West	West Gore Residential 1
	West Gore Residential 2
	South West Gore Residential 1
	South West Gore Residential 2
Residential Central	Central South West Gore Residential
	Central West Gore Residential
	South East Gore Residential
Residential North	East Gore Residential 1
	East Gore Residential 2
	Wentworth Heights
	North Gore Residential
	North West Gore Residential
	Central North Gore Residential
Urban Fringe	South Gore Rural
	West Gore Rural
	North East Gore Rural 1
Industrial	South Gore Industrial
	South East Gore Industrial
	East Gore Industrial
	North Gore Industrial
	McNab
	Gore Saleyard Industrial
	Racecourse Road
	Gore Aerodrome
MATAURA	
Residential	North West Mataura Residential
	South West Mataura Residential
	South East Mataura Residential
	North East Mataura Residential
Industrial	Central Mataura Industrial
	West Mataura Industrial
	East Mataura Industrial
	North Mataura Industrial 1
	North Mataura Industrial 2
	South Mataura Industrial
REST OF DISTRICT	
Industrial	Mandeville
	New Vale
	Pukerau
Rural East	Kaiwera South
	Kaiwera North
Rural North	Benio
	Merino Downs / Greenvale
	Waikaka
	Wendon / Otama
Rural West	Dolamore / Stoney Creek
	Waimumu
	North Gore Rural 2
	West Mataura Rural
	East Mataura Rural
OUTSIDE GORE DISTRICT	
Waitaki District	na
Central Otago District	na
Queenstown-Lakes District	na
Dunedin City	na
Clutha District	na
Southland District	na
Invercargill City	na
Other Origins	na

Appendix 5: 2006 Travel to Work Survey Summary

		(Origin) Residence of Workers																			
(Destination) Location of Workplace		610010	610032	610033	610210	610220	610230	610240	610250	610400	Total Gore	Central	Clutha	Dunedin	Invercargill	Queenstown	Southland	Waitaki	Rest of	TOTAL	Destination of
		Charlton	Chatton	Kaiwera	North Gore	East Gore	Central Gore	West Gore	South Gore	Mataura	District	Otago				Lakes			Study Area	STUDY AREA	Gore Workforce
	610010 Charlton	114	15	15	42	33	21	75	18	69	402	-	12	-	12	-	63	-	87	489	8%
	610032 Chatton	9	531	3	24	12	6	30	6	9	630	-	12	9	84	-	78	-	183	813	13%
	610033 Kaiwera	3	12	285	12	9	-	21	-	6	348	-	15	-	9	-	12	-	36	384	7%
	610210 North Gore	15	30	18	135	48	21	99	24	15	405	-	33	3	15	3	51	-	105	510	8%
	610220 East Gore	3	-	6	18	66	9	27	-	6	135	-	3	-	6	-	9	3	21	156	3%
	610230 Central Gore	42	81	57	228	165	141	402	75	48	1,239	9	111	9	33	3	183	-	348	1,587	25%
	610240 West Gore	12	33	21	66	57	24	237	24	27	501	3	27	3	18	-	42	-	93	594	10%
	610250 South Gore	6	12	-	15	15	9	30	36	6	129	-	15	-	6	-	6	-	27	156	3%
	610400 Mataura	36	33	24	57	45	21	96	36	279	627	-	12	3	57	-	147	-	219	846	13%
	Total Gore District	240	747	429	597	450	252	1,017	219	465	4,416	12	240	27	240	6	591	3	1,119	5,535	91%
	Central Otago	-	3	-	-	-	-	6	-	-	9										0%
	Clutha	3	9	15	15	12	9	24	9	-	96										2%
	Dunedin	-	-	6	3	-	-	3	-	-	12										0%
	Invercargill	9	12	3	6	21	9	42	6	9	117										2%
	Queenstown Lakes	3	-	-	-	-	-	6	-	-	9										0%
	Southland	12	33	9	21	30	9	45	6	39	204										4%
	Waitaki	-	-	-	-	-	-	-	-	-	-										0%
	Rest of Study Area	27	57	33	45	63	27	126	21	48	447										9%
	TOTAL STUDY AREA	267	804	462	642	513	279	1,143	240	513	4,863										100%
	Origin of Gore Workers	4%	13%	8%	11%	8%	5%	18%	4%	8%	80%	0%	4%	0%	4%	0%	11%	0%	20%	100%	

Source: Statistics New Zealand 2006 Census Travel To Work Survey (Based on Main Means for travelling to work for persons employed)