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# **PALMERSTON NORTH CITY COUNCIL**

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## **AGENDA**

# **MANAWATU DISTRICT/PALMERSTON NORTH CITY JOINT STRATEGIC PLANNING COMMITTEE**

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**1PM, THURSDAY 9 DECEMBER 2021**

NOTE: AT COVID 19 PROTECTION FRAMEWORK ORANGE MEETINGS  
WILL BE HELD VIRTUALLY AND RECORDINGS MADE AVAILABLE ON

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# Joint Strategic Planning Committee Agenda

Thursday 09 December 2021,  
1:00pm

Note: At COVID-19 Protection Framework Orange and Red levels meetings are held virtually and recordings made available on [www.mdc.govt.nz](http://www.mdc.govt.nz).

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## **MEMBERSHIP**

### **Chairperson**

Mayor Helen Worboys

### **Deputy Chairperson**

Mayor Grant Smith

### **Members**

*Manawatū District Council representatives:*

Her Worship the Mayor Helen Worboys and Councillors Steve Bielski, Michael Ford, Grant Hadfield and Phil Marsh

*Palmerston North City Council representatives:*

His Worship the Mayor Grant Smith and Councillors Susan Baty, Zulfiqar Butt, Leonie Hapeta and Aleisha Rutherford

### **Responsibilities**

- a. To address strategic planning issues that impact on both Manawatū District and Palmerston North City, in particular issues relating to but not restricted to infrastructure, land use planning and economic development.
- b. To consider community planning and community outcomes implications. For the purpose of the Joint Committee's Terms of Reference, "Strategic Planning Issues" mean those that are referred to the Joint Committee by either MDC and/or PNCC, taking an inter-regional perspective.
- c. To consider and promote the creation and growth of economic wealth for Manawatū and beyond, with particular reference to the activities of the Central Economic Development Agency Limited.

### **Delegated Authority**

The Joint Committee will have recommending status only, other than the power:

- a. To appoint and discharge subcommittees and working parties as it considers appropriate, and to delegate any of its functions or duties to subcommittees so appointed; and
- b. To make decisions on meeting procedures where such decisions are either required or permitted by Standing Orders or relevant legislation.
- c. In relation to the Central Economic Development Agency Limited (CEDA), the Joint Strategic Planning Committee has the following functions, powers, and duties under the Local Government Act 2002 and/or the Companies Act 1993:
  - i. To adopt a policy that sets out the process for the identification, appointment and remuneration of directors;
  - ii. To appoint and remove a person or persons to be directors of CEDA;
  - iii. To approve the remuneration to be paid to directors of CEDA;
  - iv. To undertake performance monitoring of CEDA, as per section 65 of the Local Government Act 2002;
  - v. To agree with the Statement of Intent of CEDA or, if the Joint Committee does not agree, to take all practical steps to require a Statement of Intent to be modified, as per section 65 of the Local Government Act 2002.
  - vi. To receive the half yearly report of CEDA, as shareholder;
  - vii. To receive the Annual Report of CEDA, as shareholder.

Recommendations made by the Joint Committee will be reported immediately to the Councils for adoption. Minutes of meetings of the Joint committee will be reported to the following ordinary meeting of the Joint Committee for confirmation as a correct record.



Shayne Harris

## ORDER OF BUSINESS

		PAGE
1.	<b>MEETING OPENING</b>	
2.	<b>APOLOGIES</b>	
3.	<b>CONFIRMATION OF MINUTES</b>	5
	<i>Draft resolution</i>	
	<i>That the minutes of the Joint Strategic Planning Committee meeting held 09 September 2021 be adopted as a true and correct record.</i>	
4.	<b>DECLARATIONS OF INTEREST</b>	
	Notification from elected members of:	
4.1	Any interests that may create a conflict with their role as a committee member relating to the items of business for this meeting; and	
4.2	Any interests in items in which they have a direct or indirect pecuniary interest as provided for in the Local Authorities (Members' Interests) Act 1968	
5.	<b>NOTIFICATION OF LATE ITEMS</b>	
	Where an item is not on the agenda for a meeting, that item may be dealt with at that meeting if:	
5.1	The Committee by resolution so decides; and	
5.2	The Chairperson explains at the meeting at a time when it is open to the public the reason why the item is not on the agenda, and the reason why the discussion of the item cannot be delayed until a subsequent meeting.	
6.	<b>PRESENTATIONS</b>	
	There were no presentations scheduled for this meeting.	
7.	<b>OFFICER REPORTS</b>	
7.1	<b>QUARTERLY ECONOMIC MONITOR</b>	9
	Report of the Chief Planning Officer dated 30 November 2021	
7.2	<b>CEDA STATEMENT OF EXPECTATIONS 2022-2023</b>	51
	Report of the General Manager – Community dated 24 November 2021	
8.	<b>CONSIDERATION OF LATE ITEMS</b>	
9.	<b>DISCUSSION</b>	
	The role and future potential of the Joint Strategic Planning Committee.	58
10.	<b>NOTIFICATION OF ITEMS FOR NEXT MEETING</b>	
11.	<b>PUBLIC EXCLUDED BUSINESS</b>	
	COMMITTEE TO RESOLVE:	
	That the public be excluded from the following parts of the proceedings of this meeting, namely:	



- a) Confirmation of Minutes
- b) Appointment of Chair and Independent Directors - CEDA

That the general subject of each matter to be considered while the public is excluded, the reason for passing this resolution in relation to each matter, and the specific grounds under Section 48(1) of the Local Government Official Information and Meetings Act 1987 for the passing of this resolution are as follows:

General subject of each matter to be considered	Reason for passing this resolution in relation to each matter	Grounds under Section 48(1) for the passing of this resolution
a) Confirmation of minutes re CEDA Director Recruitment	Section 7(2)(a) Protect the privacy of natural persons, including that of deceased natural persons	Section 48(1)(a) - the public conduct of the relevant part of the proceedings would be likely to result in a disclosure of information for which good reason for withholding that information would exist, under Section 7 of the Local Government Official Information and Meetings Act 1987.
b) Appointment of Chair and Independent Directors - CEDA	As above.	As above.

This resolution is made in reliance on Section 48(1) of the Local Government Official Information and Meetings Act 1987 and the particular interests protected by Section 6 or Section 7 of the Act which would be prejudiced by the holding of the whole or the relevant part of the proceedings of the meeting in public as specified above.

## 12. MEETING CLOSURE

MINUTES	MEETING	TIME
<b>JOINT STRATEGIC PLANNING COMMITTEE</b>	<b>THURSDAY 09 SEPTEMBER 2021</b>	<b>1:03PM</b>

Minutes of a meeting of the Manawātū District / Palmerston North City Joint Strategic Planning Committee held on Thursday 09 September 2021, commencing at 1:03pm via Zoom.

PRESENT:	Mayor Helen Worboys	(Chairperson)
	Cr Steve Bielski	(Manawātū District Council)
	Cr Michael Ford	(Manawātū District Council)
	Cr Grant Hadfield	(Manawātū District Council)
	Cr Phil Marsh	(Manawātū District Council)
	Mayor Grant Smith	(Palmerston North City Council)
	Cr Susan Baty	(Palmerston North City Council)
	Cr Zulfiqar Butt	(Palmerston North City Council)
	Cr Leonie Hapeta	(Palmerston North City Council)
	Cr Aleisha Rutherford	(Palmerston North City Council)
IN ATTENDANCE:	Malcolm Bailey	(CEDA)
	David Wright	(CEDA)
	Jacqui Middleton	(CEDA)
	Cr Brent Barrett	(Palmerston North City Council)
	Cr Rachel Bowen	(Palmerston North City Council)
	Cr Lew Findlay	(Palmerston North City Council)
	Cr Patrick Handcock	(Palmerston North City Council)
	Cr Karen Naylor	(Palmerston North City Council)
	Shayne Harris	(Chief Executive, MDC)
	Frances Smorti	(General Manager – People and Culture, MDC)
	Michael Hawker	(Acting General Manager – Community and Strategy, MDC)
	Karel Boakes	(Acting General Manager – Corporate and Regulatory, MDC)
	Stacey Bell	(Economist, MDC)
	Allie Dunn	(Governance Team Leader, MDC)
	Steph Skinner	(Governance Officer, MDC)
	Heather Shotter	(Chief Executive, PNCC)
	David Murphy	(Chief Planning Officer, PNCC)
	Hannah White	(Democracy and Governance Manager, PNCC)

#### JSP 21/123 MEETING OPENING

Her Worship the Mayor declared the meeting open.

#### JSP 21/124 APOLOGIES

There were no apologies.

#### JSP 21/125 CONFIRMATION OF MINUTES

##### **RESOLVED**

**That the minutes of the Joint Strategic Planning Committee meeting held 08 July 2021 be adopted as a true and correct record.**



MINUTES	MEETING	TIME
JOINT STRATEGIC PLANNING COMMITTEE	THURSDAY 09 SEPTEMBER 2021	1:03PM

**Moved by:** Councillor Michael Ford

**Seconded by:** Councillor Aleisha Rutherford

**CARRIED**

**JSP 21/126 DECLARATIONS OF INTEREST**

There were no declarations of interest.

**JSP 21/127 NOTIFICATION OF LATE ITEMS**

There were no late items.

**JSP 21/128 PUBLIC FORUM**

There were no requests to speak in public forum at this meeting.

**JSP 21/129 PRESENTATIONS**

There were no presentations organised for this meeting.

**JSP 21/130 CEDA ANNUAL REPORT 2020-21**

Report of the Acting General Manager – Community and Strategy and Chief Planning Officer dated 25 August 2021 presenting the Central Economic Development Agency's (CEDA) Annual Report to 30 June 2021. Malcolm Bailey, Chairperson of the Central Economic Development Agency, with David Wright Acting Chief Executive and Jacqui Middleton Finance and Operations Manager, spoke to their report and answered questions from the meeting.

**RESOLVED**

- 1 That the Central Economic Development Agency's (CEDA) Annual Report to 30 June 2021 be received subject to completion of Audit NZ sign off.**
- 2 That the committee notes that the Audit NZ feedback will be submitted for the committee's information at the next available committee meeting after receipt.**

**Moved by:** Councillor Michael Ford

**Seconded by:** Councillor Leonie Hapeta

**CARRIED**

**JSP 21/131 ANNUAL CEDA MONITORING AND QUARTERLY ECONOMIC MONITOR REPORT**

Report of the Chief Planning Officer dated 25 August 2021 providing a summary of Annual Monitoring Indicators for Central Economic Development Agency (CEDA) for the year ended June 2021, key data from the latest Manawatu Region Quarterly Economic Monitor for the June 2021 quarter; and major developments.

MINUTES	MEETING	TIME
JOINT STRATEGIC PLANNING COMMITTEE	THURSDAY 09 SEPTEMBER 2021	1:03PM

Stacey Bell, Economist (MDC) gave a presentation that outlined economic performance for the quarter noting in summary that:

- Errors were detected in the June 2021 Infometrics GDP result for the District – the data was corrected and the GDP model recalculated;
- Primary sector outlook remained strong and continued to drive investment and spending;
- Inward investment from development and construction projects provided substantial support;
- Jobs growth reflective of strong economic performance;
- regional economy had proven resilient and was expected to bounce back from renewed restrictions;
- Labour/supply side constraints/inflation were causing concern to businesses.

A summary of key findings were:

- GDP growth compares well with national growth;
- Jobs growth exceeded national growth while jobseeker numbers were falling faster;
- Strong recovery and growth in consumer and tourism spending;
- New dwelling consents remained elevated across the wider region;
- Building consent values reflected strong construction investment flowing into the region;
- \$8 billion in major development and construction projects to 2035 support the outlook for the regional economy;
- Commodity prices and favourable export conditions continue to support the regional economy;
- Supply side constraints and inflationary pressures cause concern.

#### RESOLVED

**That the Central Economic Development Agency Annual Monitoring Indicators, the summary report on the June 2021 Manawātū Region Quarterly Economic Monitor and the Major Developments report are received.**

**Moved by: Mayor Grant Smith**

**Seconded by: Councillor Phil Marsh**

#### CARRIED

#### JSP 21/132 CONSIDERATION OF LATE ITEMS

There were no late items notified for consideration.

#### JSP 21/133 ITEMS FOR NEXT MEETING

The Chairperson asked members to contact her with any items they wished included in the agenda for the next meeting. The Deputy Chairperson sought inclusion of workshop items into the committee meeting agenda rather than having a workshop held separately.



MINUTES	MEETING	TIME
JOINT STRATEGIC PLANNING COMMITTEE	THURSDAY 09 SEPTEMBER 2021	1:03PM

JSP 21/134 PUBLIC EXCLUDED BUSINESS

**RESOLVED**

That the public be excluded from the following parts of the proceedings of this meeting, namely:

a) CEDA Director Recruitment

That the general subject of each matter to be considered while the public is excluded, the reason for passing this resolution in relation to each matter, and the specific grounds under Section 48(1) of the Local Government Official Information and Meetings Act 1987 for the passing of this resolution are as follows:

General subject of each matter to be considered	Reason for passing this resolution in relation to each matter	Grounds under Section 48(1) for the passing of this resolution
a) CEDA Director Recruitment	Section 7(2)(a) Protect the privacy of natural persons, including that of deceased natural persons.	Section 48(1)(a) - the public conduct of the relevant part of the proceedings would be likely to result in a disclosure of information for which good reason for withholding that information would exist, under Section 7 of the Local Government Official Information and Meetings Act 1987.

This resolution is made in reliance on Section 48(1) of the Local Government Official Information and Meetings Act 1987 and the particular interests protected by Section 6 or Section 7 of the Act which would be prejudiced by the holding of the whole or the relevant part of the proceedings of the meeting in public as specified above.

Moved by: Mayor Helen Worboys

Seconded by: Councillor Michael Ford

**CARRIED**

*The meeting went into public excluded session at 2:09pm. For items JSP 21/135 to JSP 21/137 refer to public excluded proceedings. The meeting returned to open session at 2:25pm.*

JSP 21/138 MEETING CLOSURE

The meeting was declared closed at 2:25pm.

## MEMORANDUM

**TO:** Manawatu District/Palmerston North City Joint Strategic Planning Committee

**MEETING DATE:** 9 December 2021

**TITLE:** Summary report on the September 2021 Manawatū Region Quarterly Economic Monitor, Annual Population report, Annual Business and Employment report and Quarterly Retail report

**PRESENTED BY:** Peter Crawford, Economic Policy Advisor, Stacey Bell, Economist

**APPROVED BY:** David Murphy, Chief Planning Officer

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### RECOMMENDATION(S) TO COUNCIL

1. That the Summary report on the September 2021 Manawatū Region Quarterly Economic Monitor, Annual Population report, Annual Business and Employment report and Quarterly Retail report, is received
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- 1.1. This memorandum presents a summary of:
  - a. key themes in the latest Manawatū Region Quarterly Economic Monitor for the September 2021 quarter,
  - b. Annual Population report,
  - c. Annual Business and Employment report,
  - d. Quarterly Retail report.
- 1.2. Covid-19 restriction levels applying in the Manawatū region during the September quarter were:
  - a. Level-1, 1 July – 17 August
  - b. Level-4, 17 August – 31 August
  - c. Level-3, 31 August – 7 September
  - d. Level-2, 7 September – 30 September
- 1.3. The latest Manawatū Quarterly Economic Monitor report indicates a 2.6% decline in GDP in the Manawatū region in the September quarter, while GDP for New Zealand is estimated to have declined by 3.7%. The decline was



expected because of the impact of tighter COVID-19 restrictions in place from 17 August.

- 1.4. The economic outlook for the region remains very positive, with continuing growth in the value of residential and non-residential consents expected in the December quarter and a very strong outlook for prices for the agricultural sector.
- 1.5. Population growth in the region was weak in the year to June 2021 due to the impact of border restrictions on international student numbers and other migrants arriving in the region. International student numbers in the region declined by 405 from the previous year. It is not clear when border restrictions on the arrival of international students and skilled migrants will be eased, but the recent decision to reduce the time required in managed isolation for fully vaccinated New Zealand residents will contribute to an increase in international arrivals.

## **2. MANAWATŪ REGION QUARTERLY ECONOMIC MONITOR – SEPTEMBER 2021**

- 2.1 Estimated annual gross domestic product (GDP) in the Manawātū region increased by 4.6% in the year ended September 2021, compared with an increase of 6.2% in the year to June. New Zealand GDP is estimated to have increased by 3.7% in the year to September 2021.
  - a. Palmerston North GDP increased by 4.6%.
  - b. Manawātū District GDP increased by 5.0%.
- 2.2 Infometrics estimates for employment suggest 55,909 people living in the Manawātū region were employed in the year ended September 2021, an increase of 1.4% from the previous year (770 more people employed). The number of people in employment in New Zealand was 0.6% higher than the previous year.
  - a. There were 35,542 Palmerston North residents in employment in the year to September 2021, increasing by 1.4% from 2020.
  - b. There were 20,366 Manawātū district residents in employment in the year to September 2021, increasing by 1.9% from 2020.
- 2.3 Electronic card retail spending in the Manawātū region in the September quarter was \$360 million, a decline of 5.3% from the September 2020 quarter, while national spending declined by 8.0%.
  - a. Annual electronic card retail spending in the region for the year ended September 2021 was \$1,562 million, an increase of 9.4% from 2020. This compares with an increase of 6.0% for New Zealand.

- 2.4 The total value of building consents issued in the region in the September 2021 quarter was \$124 million, compared with \$83 million in the September 2020 quarter, an increase of 50%. National consent values increased by 22%.
- a. Building consents to the value of \$556 million were issued in the region in the year to September 2021, an increase of 19% from the previous year. National consent values increased by 22%. The value of building consents issued in Palmerston North was \$398 million, an increase of 8% from the previous year, while the value in Manawatū district was \$158 million, increasing by 60%.
  - b. Consents for 183 new residential dwellings were issued in the region in the September 2021 quarter, compared with 129 in the September 2020 quarter (an increase of 42%). National consents increased by 30%.
  - c. Consents for 776 new residential dwellings were issued in the region in the year ended September 2021, compared with 722 in the previous year, an increase of 7%. National consents increased by 26%.
  - d. Non-residential consents to the value of \$198 million were issued in the region during the year to September 2021, an increase of 2% from the previous year. National consents increased by 11% over the same period.
- 2.5 Car registrations in the region increased by 13.3% in the year ended September 2021 (national registrations increased by 8.5%) while the number of commercial vehicles registered declined by 1.4% (compared to a national increase of 13.0%).
- 2.6 It is estimated the annual average unemployment rate in the Manawatū region in the year ended September 2021 was 3.6%, which was below the unemployment rate of 4.2% for New Zealand.
- 2.7 The number of people in the region registered for the MSD Job Seekers benefit declined by 9.5% in September 2021 from September 2020, while the number in New Zealand declined by 5.1%. The MSD benefit numbers reported in the Infometrics report are based on the average of the last four quarters.
- 2.8 Traffic flows in the Manawatū region in the year to September 2021 increased by 12.2% from 2020, while there was an increase of 7.1% for New Zealand.
- 2.9 Electronic card tourism spending in the Manawatū region in the September quarter was \$65 million, a decline of 8% from the September 2020 quarter. Total tourism spending in New Zealand declined by 11%.
- a. Total electronic card visitor spending in the region was \$306 million in the year ended September 2021 (\$273 million in Palmerston North and \$33 million in Manawatū district), increasing by 17% from the previous year (New Zealand increased by 4.0%).

- b. Domestic visitor spending in the region was \$293 million in the year ended September 2021, increasing by 19% from the previous year (22% increase for New Zealand). There was an 4% decline in visitor spending from Auckland, Wellington region spending increased by 12%, while there was a 13% increase from the Manawatū-Whanganui region.
  - c. International visitor spending in the region was \$14 million in the year ended September 2021, declining by 11% from the previous year (63% decline for New Zealand).
- 2.10 An average of 112,996 people were enrolled with primary healthcare providers in the Manawatū region in the year ended September 2021, an increase of 1.3% from the previous year, or 1,464 people. Growth was higher than for New Zealand, where the annual increase was 1.1%.
- 2.11 The Manawatū Economic Monitor report for the September 2021 quarter is attached as Appendix 1.

### **3. ANNUAL POPULATION REPORT**

- 3.1 Annual provisional population estimates released by Statistics New Zealand on 22 October show the population of the Manawatū region reached 123,500 in June 2021. These suggest the region's population increased by 670 people from June 2020, an increase of 0.5%. Statistics New Zealand revised up its initial June 2020 estimate for Manawatū District by 200 people. Estimated population growth for New Zealand was 0.6%.
- 3.2 Statistics New Zealand estimates the contributions to population growth in the Manawatū region in the year to June 2021 came from<sup>1</sup>:
- a. 620 people from natural population growth (the difference between the number of births and deaths),
  - b. net international migration gain of 70 people, and
  - c. no change from internal migration within New Zealand.
- 3.3 All university cities were impacted by border restrictions. The annual population increase for Palmerston North was 0.2%, Dunedin increased by 0.3%, Wellington and Christchurch increased by 0.1% and Auckland declined by 0.1%. Hamilton was the only university city which grew faster than the national growth rate.
- 3.4 The estimate for 2021 is provisional and may be revised next year once Statistics New Zealand has updated its database of linked central government data for individuals, which is used to estimate internal migration. It was not updated in time for the 2021 estimates.

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<sup>1</sup> There are small differences between the actual increase in population due to rounding.

- 3.5 The Annual Population Report 2021 is attached as Appendix 2

#### **4. ANNUAL BUSINESS AND EMPLOYMENT REPORT**

- 4.1 The latest employment report shows a 0.3% increase in employment in the region in 2021, an increase of 300 people. Employment in New Zealand the year to February 2021 declined by 7,700 people, a decline of 0.3%. There were 62,800 people employed in the region in February 2021, accounting for a 2.7% share of New Zealand's workforce.
- 4.2 There were 11,994 businesses in the region in February 2021, a decline of 0.1% from 2020, while the number of businesses in New Zealand increased by 0.4%. Two factors contributing to the decline in business in the region were consolidation of agricultural units and a decline in self-employment. The self-employment rate tends to decline when unemployment rates are low. However, in Manawātū District, agriculture accounts for the high self-employment rate.
- 4.3 The three-year business survival rate in the region improved from 55.7% for businesses created in the year to February 2017 to 56.2% for businesses created in the year to February 2018. The three-year survival rate for all businesses in New Zealand created in the year to February 2018 was 58.2%.
- 4.4 Statistics New Zealand initially estimated an increase of 1.6%, or 1,000 jobs in the region the year to February 2020. This has been revised up to an increase of 2.8%, with an additional 1,700 jobs created in the region in the year to February 2020.
- 4.5 Declines in employment in the region in a number of sectors contributed to the weak increase in employment in the year to February 2021. The largest decline was in tertiary education, where there was a loss of 300 jobs. Other sectors experiencing declines included:
- Department stores
  - Air conditioning and heating services
  - Gardening services
  - Supermarket and grocery stores
  - Cafes and restaurants
  - Secondary education
  - Other allied health services
  - Travel agency and tour arrangement services
  - Clothing retailing
  - Accommodation
- 4.6 Sectors recording growth in the year to February 2021 include; construction (increase of 250 jobs), health care and social assistance (increase of 220 jobs) and public administration and safety (increase of 150 jobs).

- 4.7 The 2021 Manawātū Region Annual Business and Employment Report is attached as Appendix 3.

## **5. MANAWATU REGION RETAIL REPORT FOR SEPTEMBER 2021 QUARTER**

- 5.1 The latest quarterly retail report for the Manawātū region shows electronic card retail spending in the Manawātū region declined by 5.3% in the September quarter. New Zealand retail spending declined by 8.0%.
- 5.2 COVID-19 Level-3 restrictions between 1 and 7 September and Level-2 restrictions for the remainder of month contributed to the 1.2% decline in card spending in Palmerston North in the month of September, while spending in Manawātū District increased by 4.4%. The Level-2 restrictions on events activity in the city were an important contributor to the weakness in retail spending and will also impact spending in the December quarter. Spending in New Zealand declined by 17% in September.
- 5.3 Spending by residents at Manawātū region retailers declined by 4.5% in the September quarter, while spending by residents in other regions declined by 11.5%. Local cardholders spent 84.7% of their electronic card spending at local merchants compared with 83.6% in the September 2020 quarter. Visitor spending in the region declined by 8.2%.
- 5.4 Visitor spending from the rest of the Horizons region declined by 9.0% in the quarter, while visitor spending from the rest of New Zealand declined by 11.3%. International card spending increased by 56% from the September 2020 quarter.
- 5.5 Retail precinct data shows a decline in spending in the Palmerston North city centre in September quarter. Spending in the inner CBD declined by 5.1%, the outer CBD declined by 9.0%, but Terrace End increased by 1.6%. Spending in the rest of the city declined by 7.2%.
- 5.6 Retail spending in Feilding declined by 0.8% in the September quarter, while spending across the remainder of the Manawātū District increased by 3.3%, supported by a 20% increase in spending on fuel.
- 5.7 A copy of the Manawātū region September Quarter Retail Report is attached as Attachment 4.

## **ATTACHMENTS**

1. Manawātū Quarterly Economic Monitor - September 2021
2. Annual Population Report (2021)
3. Annual Business and Employment Report (2021)
4. Manawātū Region Quarterly Retail Report - September 2021

### Overview of Manawātū

The Manawatu Regional economy continues to strengthen with Infometrics provisionally estimating that economic activity in the region grew 5.4%pa in the June 2021 year which compares well with 4.2%pa growth nationally. Consumer spending is also strong with electronic card transactions in the region growing 12.9%pa in the June 2021 year. Both the economic activity and consumer spending results are abnormally strong because the previous year includes the lockdown-affected June 2020 quarter. But the region's economic recovery is unmistakable.

Meat and dairy export prices remain strong with the region's forecast 2020/21 dairy payout edging up \$2m from last quarter to \$354m compared with \$326m for the 2019/20 year. And the region continues to benefit from domestic tourism with tourist expenditure of \$312m in the June 2021 year 21%pa higher than \$259m in the June 2020 year and 10% higher than \$284m in the June 2019 year.

House prices are a concern with prices rising 37%pa in the June 2021 quarter. At 1,955, house sales for the June 2021 year are close to the region's 10-year average. The March and June 2021 quarters were very strong for residential consents which suggests the market is responding to higher property prices. If consents translate into an upswing in properties coming onto the market, this should help alleviate house rising house prices. Non-residential consents are also at historically high levels and at \$202m for the June 2021 year are almost double the 10-year average. With residential and non-residential consents both strong in recent quarters, this raises the question of whether the local construction industry has the capacity to turn consents into bricks and mortar.

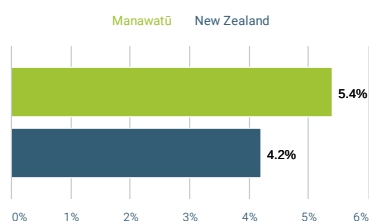
A regional unemployment rate of 4.0% in the June 2021 year will be of little comfort to construction employers looking to hire additional labour. The construction sector has created around 500 jobs in the past year, with healthcare and professional, scientific and technical services also creating similar numbers of jobs.

Indicator	Manawātū	New Zealand
<b>Annual Average % change</b>		
Gross domestic product (provisional)	5.4 % ▲	4.2 % ▲
Traffic flow	15.8 % ▲	9.6 % ▲
Consumer spending	12.9 % ▲	7.7 % ▲
Employment (place of residence)	1.2 % ▲	-0.1 % ▼
Jobseeker Support recipients	17.0 % ▲	27.7 % ▲
Tourism expenditure	20.5 % ▲	5.4 % ▲
Health enrolments	1.4 % ▲	1.3 % ▲
Residential consents	-4.7 % ▼	17.8 % ▲
Non-residential consents	9.7 % ▲	13.1 % ▲
House values *	37.2 % ▲	27.3 % ▲
House sales	8.4 % ▲	39.7 % ▲
Car registrations	9.6 % ▲	2.5 % ▲
Commercial vehicle registrations	3.5 % ▲	9.1 % ▲
<b>Level</b>		
Unemployment rate	4.0 %	4.7 %

\* Annual percentage change (latest quarter compared to a year earlier)

# Gross domestic product

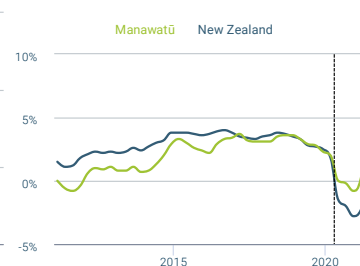
**Gross domestic product growth (provisional)**  
Annual average % change June 2020 - June 2021



**Gross domestic product (\$m)**  
Annual level, Manawātū



**Gross domestic product growth**  
Annual average % change



## Highlights for Manawātū

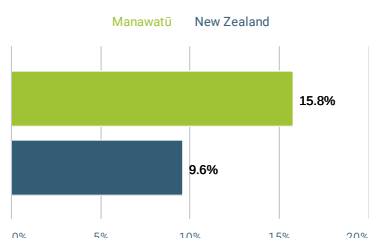
- GDP in Manawātū was provisionally up 5.4% for the year to June 2021 compared to a year earlier. Growth was higher than in New Zealand (4.2%).
- Provisional GDP was \$6,810 million in Manawātū for the year to June 2021 (2020 prices).
- Annual GDP growth in Manawātū peaked at 5.4% in the year to June 2021.

## National overview

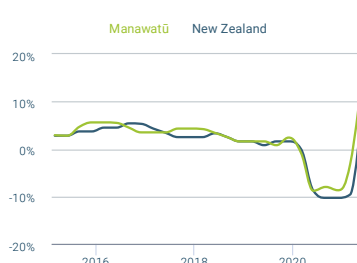
Economic activity across New Zealand continues to press higher still, with supply chain issues and skills shortages threatening to limit further growth. Provisional estimates from Infometrics show economic activity up a whopping 17%pa in the June 2021 quarter to take year-end growth to 4.2%. However, the strength in activity is clouded by the comparison June 2020 period including the nearly five-week Alert Level 4 lockdown. Compared to June 2019, economic activity is sitting 3.7% higher, with further expansion seen since the surprisingly strong result in March 2021. Strong construction activity, coupled with higher healthcare and manufacturing activity, are leading the continued improvement in economic activity. Although short-term headwinds may restrict growth going forward, risks to longer-term growth also persist as the economy overheats and drags future growth into the here and now. Higher interest rates in response to booming economic activity might well cool down the economy into 2022, towards more sustainable levels.

# Traffic flow

**Annual change in traffic flows**  
Annual average % change June 2020 - June 2021



**Traffic volume growth**  
Annual average % change



## Highlights for Manawātū

- Traffic flows in Manawātū increased by 15.8% over the year to June 2021. This compares with an increase of 9.6% in New Zealand.

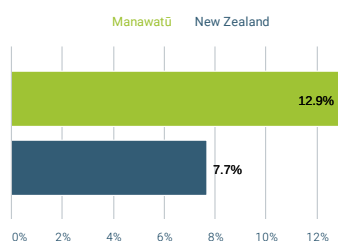
## National overview

Traffic activity rose 9.6%pa over the 12 months to June 2021, as the plunge in traffic movements during Alert Level 4 drop out of the numbers. June 2021 quarter traffic flows were sitting 2.6% higher than June 2019 quarter, indicating the strengthening level of traffic movements across the country. Traffic activity remains generally stronger across the North Island, with softer growth in the South Island. Changes to current economic drivers, including across tourism, construction, primary sector, manufacturing, and freight continue to be felt.

## Consumer spending

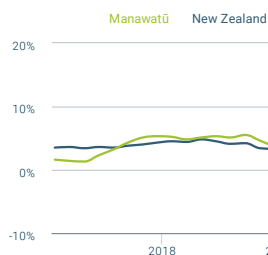
### Growth in consumer spending

Annual average % change June 2020 - June 2021



### Consumer spending

Annual average % change



### Consumer spending

Quarterly spending (\$m), Manawātū



## Highlights for Manawātū

- Electronic card consumer spending in Manawātū as measured by Marketview, increased by 12.9% over the year to June 2021 compared to the previous year. This compares with an increase of 7.7% in New Zealand.

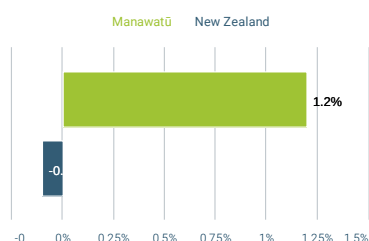
## National overview

Spending activity across New Zealand continued to rise in the June 2021 quarter, with strong demand conditions across the economy. Spending rose 33%pa in the quarter to take year-end growth to 7.7%pa according to Marketview data. However, this roaring growth is heavily exaggerated by comparing to the 12 months to June 2020 which includes the nearly five-week Alert Level 4 period. Underlying spending growth remains strong, just not that strong, with June 2021 spending up 6.5% compared to the June 2019 quarter. Unsurprisingly, main urban centres and tourism-based economies continue to show slower growth than other parts of New Zealand.

## Employment (place of residence)

### Employment (place of residence) growth

Annual average % change June 2020 - June 2021



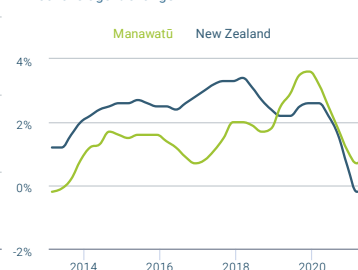
### Employment (place of residence)

Annual level, Manawātū



### Employment (place of residence) growth

Annual average % change



## Highlights for Manawātū

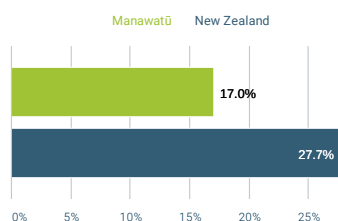
- Employment for residents living in Manawātū was up 1.2% for the year to June 2021 compared to a year earlier. Growth was higher than in New Zealand (-0.1%).
- An average of 55,322 people living in Manawātū were employed in the year to June 2021.
- Annual employment growth for Manawātū residents peaked at 3.6% in the year to December 2019.



## Jobseeker Support recipients

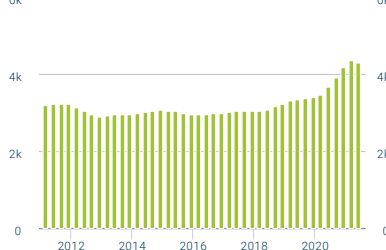
**Annual change in Jobseeker Support recipients**  
Annual average % change June 2020 - June 2021

Manawātū New Zealand



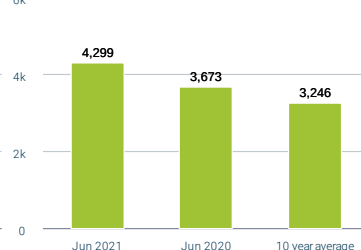
**Jobseeker Support recipients**  
Annual average, Manawātū

6k



**Jobseeker Support recipients**  
Annual average, Manawātū

6k



### Highlights for Manawātū

- Jobseeker Support recipients in Manawātū in the year to June 2021 increased by 17% compared with previous year. Growth was lower relative to New Zealand (27.7%).
- An average of 4,299 people were receiving a Jobseeker Support benefit in Manawātū in the 12 months ended June 2021. This compares with an average of 3,246 since the start of the series in 2012.

### National overview

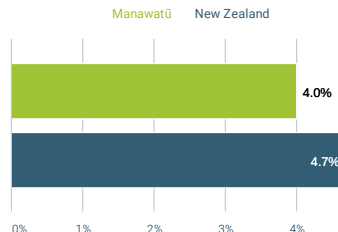
Jobseeker Support recipients continue to fall, reflecting a continued improvement in the jobs market and work by government and local job brokers to support better employment outcomes. June 2021 quarter recipient numbers were sitting at 190,260, 0.1% lower than in June 2020, after the bulk of additions to benefit support occurred. Continued falls in quarterly figures, coupled with the June 2020 skyrocket falling out of the current year numbers, means average Jobseeker Support recipients over the last 12 months have stabilised and will show reductions in future quarters. Jobseeker Support recipients remain substantially above pre-pandemic levels, with 54,000 more people on this benefit in June 2021 than in June 2019. With the jobs market strong, issues around skills matching are expected to become more pertinent.

## Unemployment rate

**Unemployment rate**

Annual average % change June 2020 - June 2021

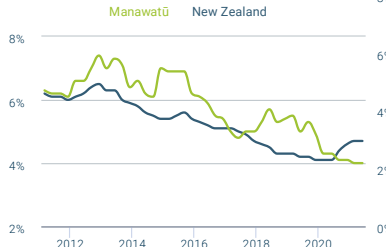
Manawātū New Zealand



**Unemployment rate**

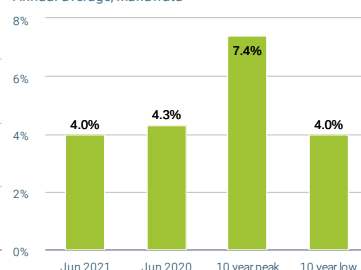
Annual average rate

Manawātū New Zealand



**Unemployment rate**

Annual average, Manawātū



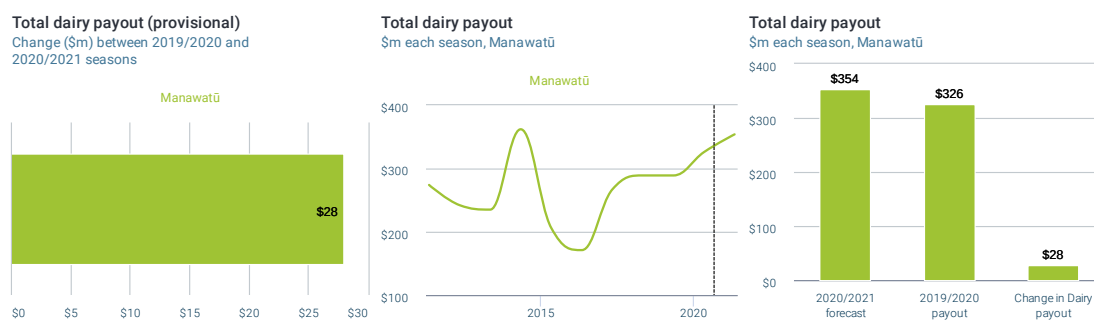
### Highlights for Manawātū

- The annual average unemployment rate in Manawātū was 4.0% in June 2021, down from 4.3% 12 months earlier.
- The unemployment rate in Manawātū was lower than in New Zealand (4.7%) in June 2021.
- Over the last ten years the unemployment rate in Manawātū reached a peak of 7.4% in December 2012.

### National overview

The unemployment rate plunged to 4.0% on a seasonally adjusted basis in June 2021, as the underutilisation rate also dropped to 10.5%. The fall in the unemployment rate was the sharpest drop on record over the last 35 years, underscoring the substantial improvement in the labour market. The sharp tightening also highlights the pressures faced to meet rampant demand even as the supply of skills remains restricted. The strong labour market performance backs up lower spare capacity in the jobs market, with strong filled jobs growth in June, record job ads, and businesses reporting both the most difficult period to find workers, and highest levels of job churn, on record. Pay increases rose in response, with more pressure on wages expected throughout 2021.

## Dairy payout



### Highlights for Manawātū

- Manawātū total dairy payout for the 2019/2020 season is estimated to have been approximately \$326 million.
- Manawātū's dairy payout for the 2020/2021 season is expected to be approximately \$354 million, \$28 million higher than last season, assuming that production levels from last season are maintained.
- The total dairy payout for New Zealand is estimated to have been approximately \$13,537 million in the 2019/2020 season, and is expected to be \$1,168 million higher in the 2020/2021 season.

### National overview

Dairy sector activity remains robust, with commodity prices coming off their peaks in recent months. Milk production across the country has been stronger than expected, with milk volumes sitting 2.6%pa higher in the 2020/21 season. Higher milk volumes have seen milk prices soften a touch for the season ahead and have also seen Fonterra narrow their farmgate milk price to \$7.45-\$7.65/kgms. This \$7.55/kgms midpoint is 5c below the previous midpoint, but the higher milk collection means our pay-out estimate has edged up 0.6% for the 2020/21 season from our March update, with \$14.7b now expected. This pay-out would be around \$1.2b (8.6%) higher than the 2019/20 season. We expect the 2021/22 season pay-out to decline slightly from the current expected estimate given supply levels.

## Tourism expenditure



### Highlights for Manawātū

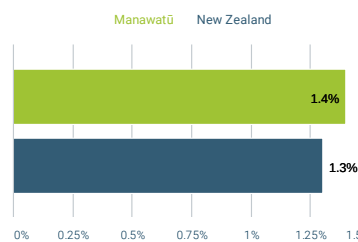
- Total tourism expenditure in Manawātū increased by 20.5% in the year to June 2021. This compares with an increase of 5.4% in New Zealand.
- Total tourism expenditure was approximately \$312 million in Manawātū during the year to June 2021, which was up from \$259 million a year ago.

### National overview

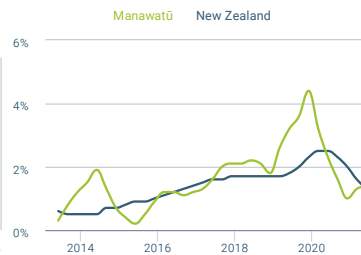
Total visitor spending over the 12 months to June 2021 was sitting 5.4% higher than in 2020 – a period that included the Alert Level 4 period when tourism was non-existent. This growth overemphasises the position of the tourism sector, but robust tourism activity is supporting spending. Relative to 2019 levels, total tourism spending is 5.2% lower, with international spending down 73%, but domestic tourism spending up nearly 18% from pre-pandemic levels. The Trans-Tasman bubble helped for a period but hopes for further recovery in tourism activity was dashed as the bubble popped and looks unlikely to reopen any time soon.

## Health enrolments

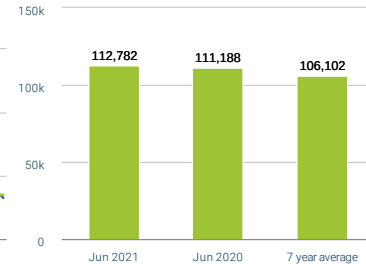
**Annual change in health enrolments**  
Annual average % change June 2020 - June 2021



**Health enrolments**  
Annual average % change



**Health enrolments**  
Annual average, Manawātū



### Highlights for Manawātū

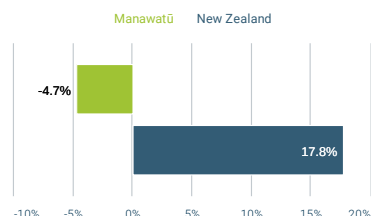
- The number of people enrolled with a primary health organisation in Manawātū in the year to June 2021 increased by 1.4% compared with previous year. Growth was higher relative to New Zealand (1.3%).
- An average of 112,782 people were enrolled with primary healthcare providers in Manawātū in the 12 months ended June 2021. This compares with an average of 105,349 since the start of the series in 2014.

### National overview

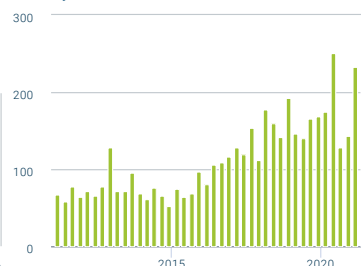
Slower population growth is evident across New Zealand as the collapse in net migration continues. Health enrolments rose by 1.0% in the June 2021 quarter compared to June 2020, the slowest pace in six years. This continued slowdown dragged year-end growth to 1.3%, considerably lower than the 2.5%pa growth seen in early 2020. The lack of migration into New Zealand has contributed to the pressures in the labour market, with the lack of skilled workers severely impacting a number of sectors. MIQ allocations are if anything lower than previously which will keep a low cap on arrivals into New Zealand.

## Residential consents

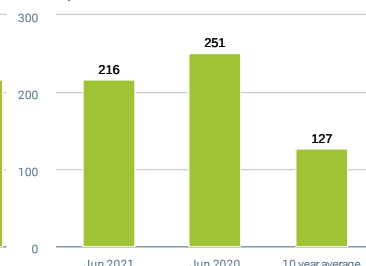
**Growth in number of new dwelling consents**  
Annual average % change June 2020 - June 2021



**Residential consents**  
Quarterly number, Manawātū



**Number of new dwelling consents**  
Quarterly number, Manawātū



### Highlights for Manawātū

- A total of 216 new residential building consents were issued in Manawātū in the June 2021 quarter, compared with 251 in the same quarter last year.
- On an annual basis the number of consents in Manawātū decreased by 4.7% compared with the same 12-month period a year ago. This compares with an increase of 17.8% in New Zealand over the same period.

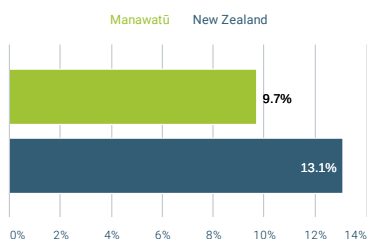
### National overview

Residential building consents continue to climb to new record highs. Annual dwelling consents are sitting at 44,299 in the year to June 2021, up a staggering 18% compared to the year prior. Sustained and rampant house price growth has highlighted the need for more housing stock. Additionally, new government policy has been implemented to encourage investors to build new housing. We expect consents to maintain their strength over the remainder of the year, but capacity constraints are becoming a more pressing issue to convert these consents into actual building activity.

## Non-residential consents

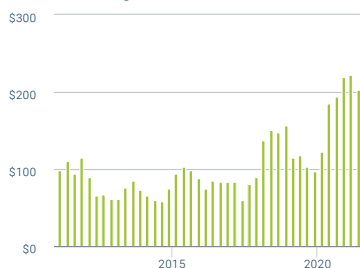
### Growth in value of consents

Annual average % change June 2020 - June 2021



### Non-residential consents, Manawātū

\$m, annual running total, Manawātū



### Non-residential consents

Annual value (\$m), Manawātū



## Highlights for Manawātū

- Non-residential building consents to the value of \$202.4 million were issued in Manawātū during the year to June 2021.
- The value of consents increased by 9.7% over the year to June 2021. By comparison the value of consents increased by 13.1% in New Zealand over the same period.
- Over the last 10 years, consents in Manawātū reached a peak of \$222.3 million in the year to March 2021.

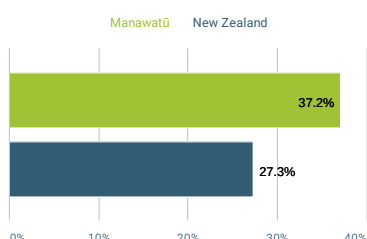
## National overview

The value of non-residential building consents climbed 13% over the year to June 2021. Factory building consents have continued to show strength over the past year. Uncertain international supply chains and rising freight costs provide a strong argument for self-reliance and have helped encourage new factory building. Public consents have also shown incredible strength over the past year, particularly for education, hospitals, and social, cultural, and religious building consents. Strong fiscal stimulus to support the economy coming out of lockdown has helped boost public consents by 51% over the year to June 2021.

## House values

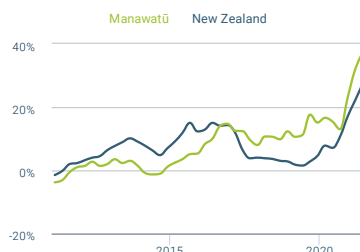
### Annual change in house value

Annual % change in house value June 2020 - June 2021



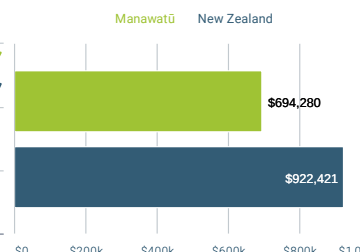
### House value growth

Annual % change



### Average current house value

Average house value in June 2021 quarter



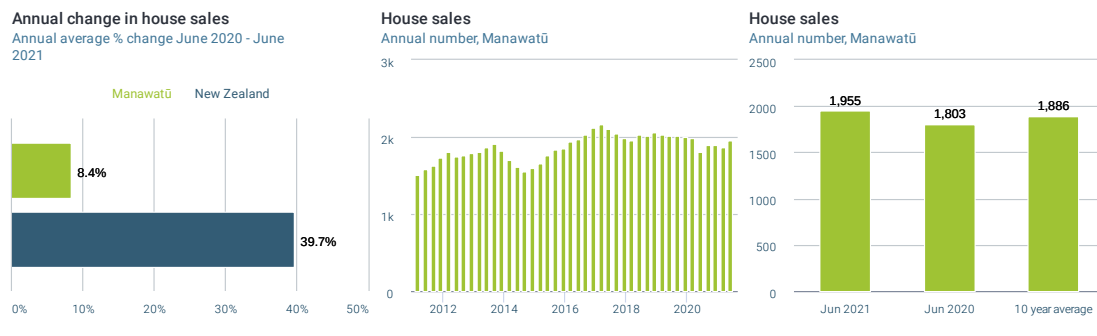
## Highlights for Manawātū

- The average current house value in Manawātū was up 37.2% in June 2021 compared with a year earlier. Growth outperformed relative to New Zealand, where values increased by 27.3%.
- The average current house value was \$694,280 in Manawātū in June 2021. This compares with \$922,421 in New Zealand.

## National overview

House prices continue their rampant run across the country, with house price growth reaching 27% in June 2021. Record low interest rates have encouraged many buyers into the market, with the low rates keeping mortgage repayments affordable despite record prices. As sales outstrip listings, a lack of supply is contributing to pushing up prices further. In recent months, sustained inflation in the economy has become a much more pressing issue, which will likely lead to an increase in the Official Cash Rate sooner than initially thought, and therefore higher mortgage rates, which may contribute to helping slow house price growth.

## House sales



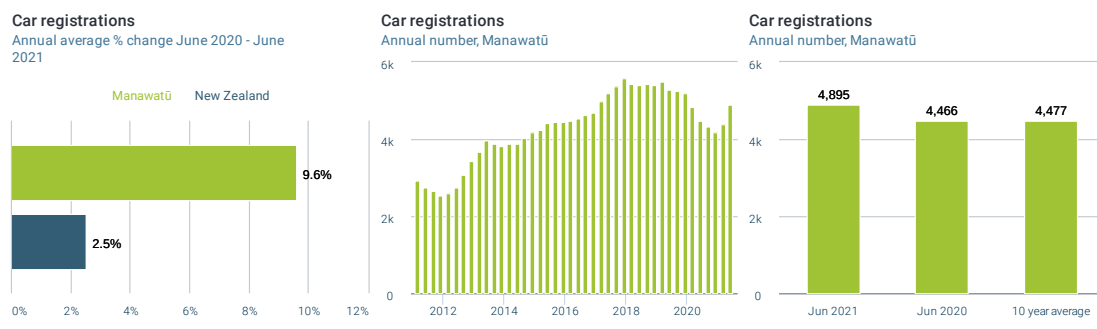
### Highlights for Manawātū

- House sales in Manawātū in the year to June 2021 increased by 8.4% compared with the previous year. Growth underperformed relative to New Zealand, where sales increased by 39.7%.
- A total of 1,955 houses were sold in Manawātū in the 12 months ended June 2021. This compares with the ten year average of 1,886.

### National overview

House sales have grown 40% over the year to June, a growth rate exaggerated by lower sales during Alert Level restrictions in the first half of 2020. Record low interest rates have encouraged buyers into the market. Rampant sales over the past year have meant supply has been unable to keep up with demand. As a result, in recent months house sales have started to show signs of a slowing trend. As prices are continuing their growth, it becomes obvious this slowing of sales is driven by a limited number of listings available for purchase, rather than a drop off in demand. This lack of supply is only contributing to further house price growth.

## Car registrations



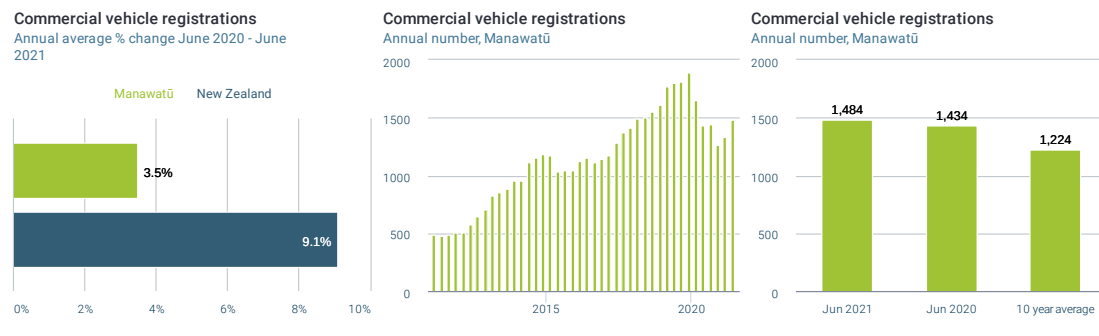
### Highlights for Manawātū

- The number of cars registered in Manawātū increased by 9.6% in the year to June 2021 compared with the previous 12 months. Growth was higher than in New Zealand (2.5%).
- A total of 4,895 cars were registered in Manawātū in the year to June 2021. This compares with the ten year average of 4,477.

### National overview

Passenger car registrations rose 2.5%pa in the 12 months to June 2021, as the fall in registrations during Alert Level 4 in 2020 moves out of the numbers. The underlying trend for car registrations is continuing to strengthen, with June 2021 quarter registrations sitting just 1.3% lower than 2019 levels. Registrations still have a way to go, with June 2021 year registrations of just under 231,000 still sitting nearly 7% below the 10-year average. Demand for vehicles remains strong, but supply chain issues have hampered registrations, forcing car prices to rise. Stronger demand for EVs is apparent since the government's new rebate was introduced, but its unknown yet how the introduction in 2022 of fees on high-emitting vehicles might influence the market.

# Commercial vehicle registrations



## Highlights for Manawātū

- The number of commercial vehicles registered in Manawātū increased by 3.5% in the year to June 2021 compared with the previous 12 months. Growth was lower than in New Zealand (9.1%).
- A total of 1,484 commercial vehicles were registered in Manawātū in the year to June 2021. This is higher than the ten year annual average of 1,224.

## National overview

Commercial vehicle registrations have shown continued strength in 2021, with annual registrations of over 54,600 sitting 9.1% higher than in 2020. Stronger economic activity across construction, retail, primary sector, manufacturing, and freight sectors have boosted commercial vehicle needs, and annual registrations are sitting 8% clear of the 10-year average. Relative to 2019 levels, current registrations look a touch weaker, but the last few years prior to COVID-19 showed exceptionally strong registration levels. Sustained strong economic conditions are expected to keep registration levels up, and recent government moves may bolster light commercial registration numbers in 2021 ahead of new fees being added to high-emitting vehicles in 2022.

## Technical Notes

### Building Consents

Building consents data is sourced from Statistics New Zealand. The number of residential consents issued for new dwellings is the measure for residential consents. For non-residential consents, the measure is the value of both new buildings and alterations.

### Consumer Spending

The consumer spending data is sourced from Marketview. It measures total electronic card spending using spending through the Paymark network and adding to it an estimate of non-Paymark network spending using the pattern of BNZ card holder spending at non-Paymark retailers. For further breakdown of the data by storetype and other variables contact Marketview.

### Employment (place of residence)

Employment data is based off a range of Stats NZ employment datasets, and represents the number of filled jobs, based on the area of residential address for the employee (rather than workplace address). This place of residence location means that the employment series reflects trends in employment of an area's residents, which may be different to trends in employment at businesses in an area, particularly when there are strong commuting flows. The most recent quarter is based off the average of Monthly Employment Indicator (MEI) filled jobs from Statistics New Zealand for the past three months, with previous quarters being backcasted using the percentage change in the quarterly Business Data Collection dataset published by Statistics New Zealand.

### Gross Domestic Product

Gross Domestic Product is estimated by Infometrics. A top down approach breaks national industrial production (sourced from production based GDP measures published by Statistics New Zealand) is broken down to TA level by applying TA shares to the national total. Each TA's share of industry output is based on earnings data from LEED. GDP growth in recent quarters is based on a model which uses the various partial economic indicators presented in this report as inputs. Estimates of GDP for these most recent quarters are provisional until Infometrics updates its annual GDP series in the Regional Economic Profile at the beginning of each year. Gross domestic product is measured in 2020 dollar terms.

### Health Enrolments

Health enrolments are sourced from the Ministry of Health. They record the number of people in each area who are enrolled with a Primary Health Organisation (PHO). Enrolment is voluntary, but most New Zealanders enrol at a general practice for health reasons and for the benefits of enrolment, such as cheaper doctors' visits and reduced costs of prescription medicines. Changes to how the Ministry of Health recorded this data led to Infometrics revising our approach to health enrolment figures for the March 2019 Quarterly Economic Monitor onwards. Our new approach completely revises our timeseries of health enrolments, so care should be taken when comparing the March 2019 report with previously downloaded reports.

Previously, the data provided was only for those people whose addresses are able to be accurately recorded by the Ministry of Health. We have now switched to breaking down TA-level health enrolments based on trends in stated health enrolments by area, to ensure that the total number of enrolees published in the Monitor align with the national-level figures published by the Ministry of Health. A new system for classifying and recording health enrolment addresses from March 2019 onwards by the Ministry means significantly higher numbers of unallocated enrolees, resulting in the need to review our model.

### House Sales

The number of house sales is sourced from REINZ. The indicator measures the number of house sales at the point when the sale becomes unconditional. The unconditional date is the date when all the terms of an agreement have been satisfied and the sale and purchase can proceed to settlement.

### House Values

House values (dollar value) are sourced from CoreLogic. The levels quoted in the report are average values for the quarter.

## Jobseeker Support Recipients

In July 2013 the New Zealand's welfare system changed to better recognise and support people's work potential. As part of this the Jobseekers Support benefit was introduced. This benefit is for people who can usually look or prepare for work but also includes people who can only work part-time or can't work at the moment, for example, because they have a health condition, injury or disability.

Data presented for the September 2013 quarter onwards is provided by the Ministry of Social Development (MSD). Data prior to September 2013 are Infometrics estimates based on re-grouping pre-July 2013 benefit categories to be consistent with the post-July 2013 benefit categories. The pre-July 2013 benefit categories used to estimate the number of Jobseekers Support recipients are: Unemployment Benefit and Unemployment Benefit Hardship; Unemployment Benefit Training and Unemployment Benefit Hardship Training; Sickness Benefit and Sickness Benefit Hardship; Domestic Purposes Benefit - Sole Parent (if youngest child is 14 or over); Women Alone and Widow's Benefit (without children or with children 14 or over)

## Tourism Expenditure

New Tourism Electronic Card Transactions (TECTs) are an interim replacement for the Monthly Regional Tourism Estimates (MRTes). We have removed our previous timeseries of MRTes and published the three annual snapshots provided in the TECTs. The TECTs reflect the expenditure for all electronic card transactions (ECTs) in New Zealand related to tourism. Marketview use a base of spending on the Paymark network (approximately 70 per cent of total ECT spend) to scale up to total ECT spend.

## Traffic Flow

Traffic flow growth rates are calculated from the number of vehicles passing approximately 110 sites monitored by New Zealand Transport Agency. Each of the sites has been mapped to a territorial authority.

## Unemployment Rate

Regional level unemployment rates are sourced from Statistics New Zealand's Household Labour Force Survey. Trends in the number of Jobseekers are used to break down regional unemployment rates to TA levels. The TA level unemployment rates are benchmarked on census following the release of each census. To reduce volatility the unemployment rate is presented as an average for the last four quarters.

## Vehicle Sales

Car and commercial vehicle sales data are sourced from New Zealand Transport Authority. Sales are based on new registrations which include the first time registration of new vehicles and used vehicles imported from overseas.

## Weekly Rents

Rents (\$ per week) are sourced from monthly data provided by MBIE and averaged across each quarter or year using weighted geometric means. Rental data pertains to averages from data collected when bonds are lodged and does not control for specifications of the home (eg. size, number of bedrooms, age of home, etc).





## Annual Population Report 2021

### Overview

The population of the Manawatū region is estimated to have reached 123,500 people as at 30 June 2021, increasing by 670 people (0.5% increase) in the past 12 months. Estimated population growth for New Zealand was 0.6%.

Palmerston North's population is estimated to have increased by 170 people in the last 12 months, an increase of 0.2%, reaching 90,500 people as at 30 June 2021.

Manawatū District's population is estimated to have increased by 500 people to 33,000 people as at June 2021, or 1.5% increase, in the last year.

The Manawatū-Whanganui region population is estimated to have reached 256,500 people, increasing by 2,000 people in the year to June 2021, an increase of 0.8%. This is first time the annual increase in the region has been higher than the national growth rate. The annual population estimates series began in 1991.

### Annual population estimates

Annual provisional population estimates released by Statistics New Zealand on 22 October show the population of the Manawatū region reached 123,500 in June 2021. These suggest the region's population increased by 670 people from June 2020, an increase of 0.5%. Statistics New Zealand revised up its initial June 2020 estimate for Manawatū District by 200 people.

Statistics New Zealand estimates the contributions to population growth in the Manawatū region in the year to June 2021 came from<sup>1</sup>:

1. 620 people from natural population growth (the difference between the number of births and deaths),
2. net international migration gain of 70 people, and
3. no change from internal migration within New Zealand.

Population growth in Palmerston North came from natural population growth of 500 people, no net gain from international migration and a net loss of 330 people from internal migration.

Manawatū District growth came from natural population growth of 120 people, net international migration of 70 people and a net gain of 330 people from internal migration.

The strongest rate of population growth in the region was in the 65 years and over age group, which increased by 3.2% between 2020 and 2021. There was a decline of 0.4% in the 0 – 14 years age group.

The median age of the City's population is estimated to have increased to 34.5 years in June 2021, while the median age for Manawatū District remained at 40.4 years. The median age for the total New Zealand population is estimated to have increased from 37.4 years in 2020 to 37.7 years in 2021.

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<sup>1</sup> There are small differences between the actual increase in population due to rounding.

**Figure 1: Estimated population by age group (as at 30 June)**

Year at 30 June	2020	2021	Annual change
<b>Manawātū region</b>			
0-14 years	24,200	24,100	-0.4%
15-39 years	43,800	43,800	0.0%
40-64 years	36,000	36,200	0.6%
65 years and over	19,000	19,600	3.2%
Total	122,900	123,500	0.5%
<b>New Zealand</b>			
0-14 years	966,400	968,600	0.2%
15-39 years	1,750,100	1,745,400	-0.3%
40-64 years	1,581,800	1,589,500	0.5%
65 years and over	791,900	819,100	3.4%
Total	5,090,200	5,122,600	0.6%

Source: Statistics New Zealand

Statistics New Zealand made revisions to its June 2019 and June 2020 population estimates, which increased the estimated June 2020 New Zealand population by 5,900 people. There was no change to the initial estimate for Palmerston North, but Manawātū District was revised up by 200 people.

### Manawātū-Whanganui region

The Manawātū-Whanganui region population is estimated to have increased by 2,000 people between June 2020 and June 2021, an annual increase of 0.8%.

Natural population growth in the Manawātū-Whanganui region was 940 people, while migration contributed an additional 1,100 people. Regions which experienced a weaker rate of population growth than the Manawātū-Whanganui region in the year to June 2021 were Auckland, Gisborne, Wellington, Nelson, Southland and West Coast.

**Figure 2: Estimated population Manawātū-Whanganui region population (as at 30 June)**

	2020	2021	2020 to 2021 change	
			Number	% change
Ruapehu district	12,950	12,900	-20	-0.1%
Whanganui district	47,900	48,400	480	1.0%
Rangitikei district	15,900	16,050	110	0.7%
Manawātū district	32,500	33,000	520	1.6%
Palmerston North	90,400	90,500	170	0.2%
Tararua district	18,900	19,050	160	0.9%
Horowhenua district	35,900	36,500	610	1.7%
<i>Manawātū region</i>	<i>122,900</i>	<i>123,500</i>	<i>600</i>	<i>0.5%</i>
<i>Horizons North-West</i>	<i>76,750</i>	<i>77,350</i>	<i>600</i>	<i>0.8%</i>
<i>Horizons South-East</i>	<i>177,700</i>	<i>179,050</i>	<i>1,350</i>	<i>0.8%</i>
Manawātū-Whanganui region	254,500	256,500	2,000	0.8%
New Zealand	5,090,200	5,122,600	32,400	0.6%

Source: Statistics New Zealand

Horowhenua District had the fastest rate of population growth in the Manawātū-Whanganui region, with annual growth of 1.7% between 2020 and 2021, while Manawātū District increased by 1.6%.

### Comparison with other cities

Palmerston North has a 1.8% share of the national population and is the ninth largest territorial authority – the largest territorial authorities ranked by population are Auckland, Christchurch, Wellington, Hamilton, Tauranga, Dunedin, Lower Hutt and Whangarei.

**Figure: Estimated major urban area populations (ranked by annual growth rate)**

Major urban area	2020	2021	2020 to 2021 change	
			Number	% change
Tauranga city	152,200	155,200	3,100	2.0%
Whangarei district	97,700	99,400	1,600	1.7%
Hastings district	89,100	90,100	1,000	1.2%
New Plymouth district	86,400	87,300	950	1.1%
Hamilton city	176,900	178,500	1,600	0.9%
Napier city	66,200	66,700	470	0.7%
Lower Hutt city	112,000	112,800	840	0.7%
Rotorua district	77,100	77,400	250	0.3%
Dunedin city	132,800	133,300	430	0.3%
<b>Palmerston North city</b>	<b>90,400</b>	<b>90,500</b>	<b>170</b>	<b>0.2%</b>
Wellington city	216,700	217,000	260	0.1%
Christchurch city	391,900	392,100	250	0.1%
Auckland	1,716,900	1,715,600	-1,280	-0.1%
New Zealand	5,090,200	5,122,600	32,400	0.6%

Source: Statistics New Zealand

Auckland was the only major urban area to experience a decline in population in the last 12 months. Statistics New Zealand also revised down its June 2020 estimate for Auckland by 600 people. Growth across the university cities was lower than usual due to the impact of the border closure on international student numbers.

Peter Crawford

**Economic Policy Advisor, Palmerston North City Council**

10 November 2021



## Manawātū Region Annual Business and Employment Report 2021

### Overview

The annual rate of employment growth in the Manawātū region in the year to February 2021 slowed to 0.5%, while employment in New Zealand declined by 0.3%. Declines in international education and tourism were the main contributors to the decline in employment in the region.

Total employee numbers in the region increased to 62,800 in February 2021, an increase of 300 jobs from February 2020. An additional 3,700 jobs have been created in the region over the past three years, an increase of more than 1,200 jobs a year.

Statistics New Zealand revised its Palmerston North employee count estimate for February 2020, adding a further 800 jobs to its original estimate. This lifted annual growth in the city in the year to February 2020 to 3.3%, while the growth rate for New Zealand was revised up to 1.4%.

The employee count estimates do not include the self-employed. Infometrics estimates the self-employed workforce on an annual basis, and these estimates will be available in early 2022. Self-employment contributes a greater share of employment in Manawātū District, accounting for 25.2% of the districts' workforce in March 2020, with the agriculture sector accounting for the high self-employment rate. Self-employment in Palmerston North accounted for just 6.8% of the city's workforce in 2020. The self-employment rate tends to decline when unemployment rates are low.

The latest Infometrics estimates suggest the unemployment rate for Manawātū region residents aged 15 years and over in the region averaged 3.6% over the year ended September 2021 compared with 4.2% for New Zealand. The estimated unemployment rate for Manawātū District over the year to September 2021 was 2.4% and 3.9% for Palmerston North.

Ministry of Social Development (MSD) job seeker benefit numbers in the region declined by 9.4% in the year to September 2021 while national job seeker benefits declined 5.1%. Palmerston North job seeker benefits declined by 9.4% over the year to September 2021 while Manawātū District declined by 9.8%.

There were 11,994 businesses in the region in February 2021, a decline of 0.1% from 2020, while the number of businesses in New Zealand increased by 0.4%. Two factors contributing to the decline in business in the region were consolidation of agricultural units and the decline in self-employment noted above.

The three-year business survival rate in the region improved from 55.7% for businesses created in the year to February 2017 to 56.2% for businesses created in the year to February 2018. The three-year survival rate for all businesses in New Zealand created in the year to February 2018 was 58.2%.

## Employee Numbers

Annual employment data for February 2021 shows there were 62,800 jobs in the Manawātū region, an increase of 300 jobs from February 2020 (0.5% increase). National employment declined by 7,700 jobs in the year to February 2021, a decline of 0.3%.

Data for the individual local authorities in the region shows that in February 2021 there were:

- 9,900 jobs in Manawātū District, an increase of 400 jobs (4.2% increase) from February 2020.
- 52,900 jobs in Palmerston North, a decline of 100 jobs (0.2% decline) from February 2020.

Sectors which contributed most to the increase in the number of jobs in the region between 2020 and 2021 were health care and social assistance sector (220 jobs), construction (250 jobs), and public administration and safety (150 jobs). Sectors where there were losses in jobs between 2020 and 2021 were education (240 less jobs), administrative and support service (340 less jobs), and retail (70 less jobs).

The decline in retail employment was due to declines in accommodation (35 less jobs), cafes and restaurants (30 less jobs), department stores (65 less jobs) and supermarkets (50 less jobs).

**Figure 1: Manawātū region employee counts – February 2021**

Industry sector	Employee count	2020 - 2021 change		2000 - 2021 change	
		Number	%	Number	%
Public Administration and Safety	7,850	150	1.9%	3,750	91%
Health Care and Social Assistance	8,700	220	2.6%	3,220	59%
Construction	5,450	250	4.8%	3,030	125%
Logistics	6,230	30	0.5%	2,310	59%
Education and Training	6,900	-240	-3.4%	1,320	24%
Retail	8,820	-70	-0.8%	1,080	14%
Other Services	2,310	60	2.7%	740	47%
Professional, Scientific and Technical Services	3,030	20	0.7%	500	20%
Rental, Hiring and Real Estate Services	1,070	60	5.9%	455	74%
Administrative and Support Services	2,550	-310	-10.8%	440	21%
Agriculture, Forestry and Fishing	2,090	0	0.0%	280	15%
Arts and Recreation Services	1,040	-20	-1.9%	265	34%
Financial and Insurance Services	980	70	7.7%	175	22%
Manufacturing	5,000	0	0.0%	150	3%
Mining	34	3	9.7%	16	89%
Electricity, Gas, Water and Waste Services	280	-10	-3.4%	8	3%
Information Media and Telecommunications	400	-10	-2.4%	-640	-62%
<b>Total</b>	<b>62,800</b>	<b>300</b>	<b>0.5%</b>	<b>17,100</b>	<b>37%</b>

Note: Employee count data in this table does not include the self-employed

Source: Statistics New Zealand

Over the period from 2000 to 2021, total employment in the region increased by 37.4%, with 17,100 more jobs in 2021 compared with 2000. The public administration and safety sector accounted for the largest share of the increase in employment, with 3,750 more jobs at the end of the 21-year period, an increase of 91%. Other significant contributors to employment

growth were healthcare and social assistance (3,220 jobs increase, 59% increase), construction (3,030 jobs increase, 125% increase), logistics (2,310 jobs, 59% increase), education and training (1,320 jobs increase, 24%) and retail (1,080 jobs increase, 14% increase).

Information media and telecommunications sector was the only sector to record a decline in employment between 2000 and 2021 (640 jobs decline, 62% decline).

Statistics New Zealand business<sup>1</sup> and employment data includes the number of geographic units (business locations) in the region and the distribution of employment by business size. In February 2021 there were 63 businesses in the region with 100 or more employees (less than 1% of total businesses) but they accounted for 33% of employees in the region.

**Figure 2: Distribution of employees by business size in the Manawātū region (February 2021)**

Business size	Geographic units	Employees	Average employees
zero employees	7,353	0	0
1 to 5	2,628	6,451	2
6 to 9	774	5,615	7
10 to 19	636	8,545	13
20 to 49	303	9,020	30
50 to 99	75	5,650	75
100+	63	20,500	325
Confidential	150	6,864	46
Total	11,988	62,734	5.2

Source: Statistics New Zealand

### Businesses and self-employment

There were 11,988 businesses in the region in February 2021, a decline of 0.1% from 2020 (18 less businesses), while the number of businesses in New Zealand increased by 0.4%. Two factors contributing to the decline in business in the region are consolidation of agricultural units and a decline in self-employment. Farm consolidation has resulted in the total number of geographic units in the region's agricultural sector declining from 2,379 units in 2000 to 1,746 in 2021, a decline of 633 units, or 27% decline.

The total number of business units in the region increased by 2,178 between 2000 and 2021, an increase of 27%. Most of this growth was in property and financial asset investing organisations, but there was a 46% increase in the construction sector and 55% increase in health care and social assistance.

The annual business data identified 7,353 geographic units that had no employees in February 2021, 61% of total geographic units in the region. The organisations without employees include the self-employed and other registered entities established for tax purposes. Some of the largest industry sectors with no employees are:

- ownership of rental residential and commercial properties (2,085 organisations in 2021).

<sup>1</sup> Statistics New Zealand uses the term businesses to cover all forms of institution, including government, non-profit, businesses, and sole-trader organisations

- financial asset investing (498 organisations).
- sheep, beef cattle, grain farming and dairy cattle farming (684 organisations).

Business Demography data on business 'births' and 'deaths' shows an increase in the number of businesses that survive for three years. There were 1,083 business births in the year to February 2018 and by February 2021, 609 businesses were still active, a survival rate of 56.2%. The survival rate for all New Zealand businesses established in the year to February 2018 was 58.2%.

**Figure 3: Three-year business survival rates**

Starting year (to February)	Manawātū region			New Zealand		
	Births	Surviving	Survival rate	Births	Surviving	Survival rate
2015	1,119	657	58.7%	65,952	37,452	56.8%
2016	984	567	57.6%	61,854	35,769	57.8%
2017	1,071	597	55.7%	69,927	41,121	58.8%
2018	1,083	609	56.2%	64,629	37,614	58.2%

There were 1,122 business births in the region in the year to February 2021 and 1,176 business deaths. The number of births increased from the previous year, but there was also an increase in the number of deaths.

## Unemployment

Unemployment data for the Manawātū Region is estimated by Infometrics using Manawātū-Whanganui region data from the Statistics New Zealand Household Labour Force Survey. September 2021 quarter estimates suggest the unemployment rate for residents aged 15 years and over in the region averaged 3.6% over the year ended September 2021 compared with 4.2% for New Zealand. The estimated unemployment rate for Manawātū District over the year to September 2021 was 2.4% and 3.9% for Palmerston North. Infometrics uses an average of the last four quarters because regional unemployment rates are subject to high sample error rates.

An alternative indicator of labour force trends is data on the number of people aged between 18 and 64 years receiving the Ministry of Social Development Job Seeker benefit. In September 2021 there were 3,963 people registered for the benefit in the Manawātū region, a decline of 9.4% from September 2020 (a decline of 415 people). National Job Seeker benefits in September declined by 5.1% from the previous year. Job seeker numbers declined by 9.8% in Manawātū District and by 9.4% in Palmerston North.

Between September 2018 and September 2021 job seeker benefit numbers in the Manawātū region increased by 21% while national job seeker benefit numbers increased by 49%. The strongest growth in benefit numbers in the region over this time period was in the 55 – 64 years age group, where there was a 32% increase in the region and a 43% increase nationally. There was a 3% increase in the 18 – 24 years age group in the region between 2018 and 2021 while national benefit numbers for this age group increased by 59%.

The number of people in the region classified as 'work ready' was 2,253 in September 2021, declining by 23% from September 2020. However, there were a further 1,710 people classified with a health condition or disability, increasing by 17% from 2020.

The benefits data suggests that males have benefitted more from the recovery from Covid-19 restrictions in the first half of 2020. There was a 13% decline in the number of males registered for the Job Seeker benefit in the Manawātū region in the year to September 2021 while the number of females registered for the benefit declined by 5%. The respective annual declines for New Zealand were 8% for males and 2% for females.

**Figure 4: Distribution of Job Seeker benefits by age**

Number of Manawātū region residents registered for a Job Seeker benefit									Sept 18 to Sept 21 change	
	September 2018		September 2019		September 2020		September 2021			
Age group	Number	Annual change	Number	Annual change	Number	Annual change	Number	Annual change	Number	% change
18 - 24 years	873	7.0%	857	-1.8%	1,155	34.8%	897	-22.3%	24	2.7%
25 - 39 years	1,058	15.5%	1,167	10.3%	1,523	30.5%	1,374	-9.8%	316	29.9%
40 - 54 years	861	9.7%	897	4.2%	1,092	21.7%	1,041	-4.7%	180	20.9%
55 - 64 years	494	13.6%	492	-0.4%	605	23.0%	651	7.6%	157	31.8%
Total	3,286	11.3%	3,413	3.9%	4,375	28.2%	3,963	-9.4%	677	20.6%

Number of New Zealand residents registered for a Job Seeker benefit									Sept 18 to Sept 21 change	
	September 2018		September 2019		September 2020		September 2021			
Age group	Number	Annual change	Number	Annual change	Number	Annual change	Number	Annual change	Number	% change
18 - 24 years	25,062	9.6%	28,525	13.8%	47,443	66.3%	39,750	-16.2%	14,688	58.6%
25 - 39 years	38,645	12.1%	44,171	14.3%	65,977	49.4%	62,064	-5.9%	23,419	60.6%
40 - 54 years	38,576	3.9%	41,355	7.2%	53,632	29.7%	52,773	-1.6%	14,197	36.8%
55 - 64 years	27,360	4.2%	28,880	5.6%	37,064	28.3%	39,051	5.4%	11,691	42.7%
Total	129,643	7.4%	142,931	10.2%	204,116	42.8%	193,638	-5.1%	63,995	49.4%

Source: Ministry of Social Development

Job seeker data for ethnic groups shows that the New Zealand European ethnic group in the Manawātū region experienced the largest increase in Job Seeker benefits between September 2018 and September 2021, with an increase of 22% from 2018. The Pacific Island ethnic group experienced the smallest annual increase (3%) while Māori benefit numbers increased by 20%.

**Figure 5: Distribution of Job Seeker benefits by ethnic group**

Number of Manawātū region residents registered for a Job Seeker benefit									Sept 18 to Sept 21 change	
	September 2018		September 2019		September 2020		September 2021			
Ethnic group	Number	Annual change	Number	Annual change	Number	Annual change	Number	Annual change	Number	% change
NZ European	1,444	7.0%	1,493	3.4%	1,955	30.9%	1,767	-9.6%	323	22.4%
Māori	1,218	19.1%	1,262	3.6%	1,546	22.5%	1,467	-5.1%	249	20.4%
Pacific Island	108	8.0%	102	-5.6%	123	20.6%	111	-9.8%	3	2.8%
All other ethnicities	413	2.5%	420	1.7%	538	28.1%	456	-15.2%	43	10.4%
Unspecified	103	33.8%	136	32.0%	213	56.6%	153	-28.2%	50	48.5%
Total	3,286	11.3%	3,413	3.9%	4,375	28.2%	3,954	-9.6%	668	20.3%



Number of New Zealand residents registered for a Job Seeker benefit									Sept 18 to Sept 21 change	
	September 2018		September 2019		September 2020		September 2021			
Ethnic group	Number	Annual change	Number	Annual change	Number	Annual change	Number	Annual change	Number	% change
NZ European	46,959	4.8%	50,031	6.5%	71,043	42.0%	66,675	-6.1%	19,716	42.0%
Māori	50,063	10.4%	56,581	13.0%	76,918	35.9%	74,439	-3.2%	24,376	48.7%
Pacific Island	10,066	14.1%	11,552	14.8%	18,048	56.2%	17,598	-2.5%	7,532	74.8%
All other ethnicities	18,358	4.3%	19,539	6.4%	29,110	49.0%	27,417	-5.8%	9,059	49.3%
Unspecified	4,197	1.6%	5,228	24.6%	8,997	72.1%	7,506	-16.6%	3,309	78.8%
Total	129,643	7.4%	142,931	10.2%	204,116	42.8%	193,635	-5.1%	63,992	49.4%

Source: Ministry of Social Development



# Manawatū Region

## Quarterly Retail Report

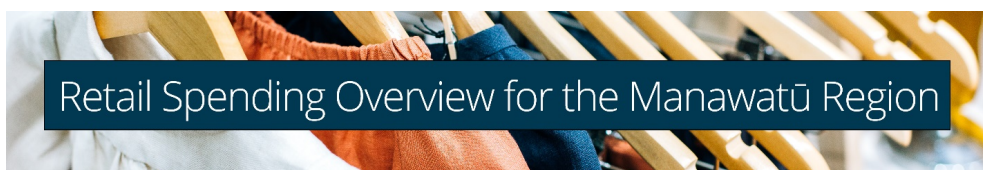
### September 2021

**PALMY**  
PARAIOEA  
PALMERSTON  
NORTH  
CITY

**MANAWATU**  
DISTRICT COUNCIL

**CEDA**  
CENTRAL ECONOMIC  
DEVELOPMENT AGENCY

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## Retail Spending Overview for the Manawātū Region

### Overview

Electronic card retail spending declined by 5.3% in the September quarter compared with the September 2020 quarter. This was due to the impact of COVID-19 Level 3 and 4 restrictions applying in the region between 17 August and 7 September. Retail spending in New Zealand declined by 8.0%, with continuing Level 3 and 4 restrictions in Auckland reducing the overall of retail spending in New Zealand.

Annual retail spending in the region was nearly \$1.6 billion in the year ended September 2021, increasing by 9% from 2020, while there was an increase of 6% for New Zealand.

### September 2021 quarter

September quarter retail spending in the region was \$360 million, declining by 5.3% from the September 2020 quarter.

Retail spending in New Zealand was \$14,537 million, declining by 8.0%.

There was a \$28 million net gain in spending at Manawātū retailers in the September quarter, declining by 2% from the September 2020 quarter.

84.7% loyalty rate (percentage of spending by Manawātū residents at local retailers).

Spending in Manawātū District declined by 0.1% in the quarter while spending in Palmerston North declined by 6.3%.



## Year ended September 2021

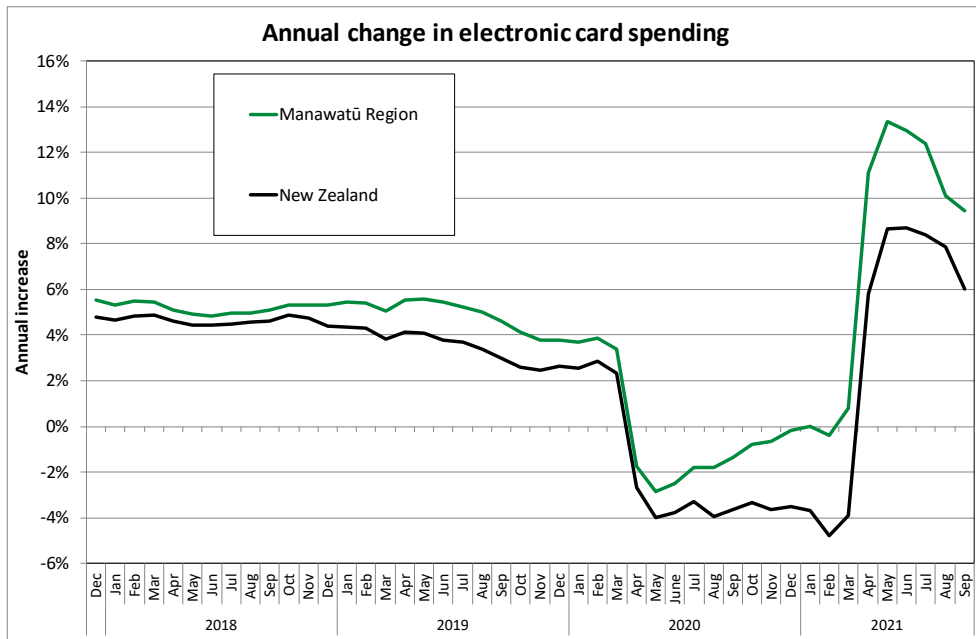
Annual spending in the region in the year to September 2021 was \$1,562 million, increasing by 9.4% from the previous year.

Retail spending in New Zealand was \$65,779 million, increasing by 6.0%.

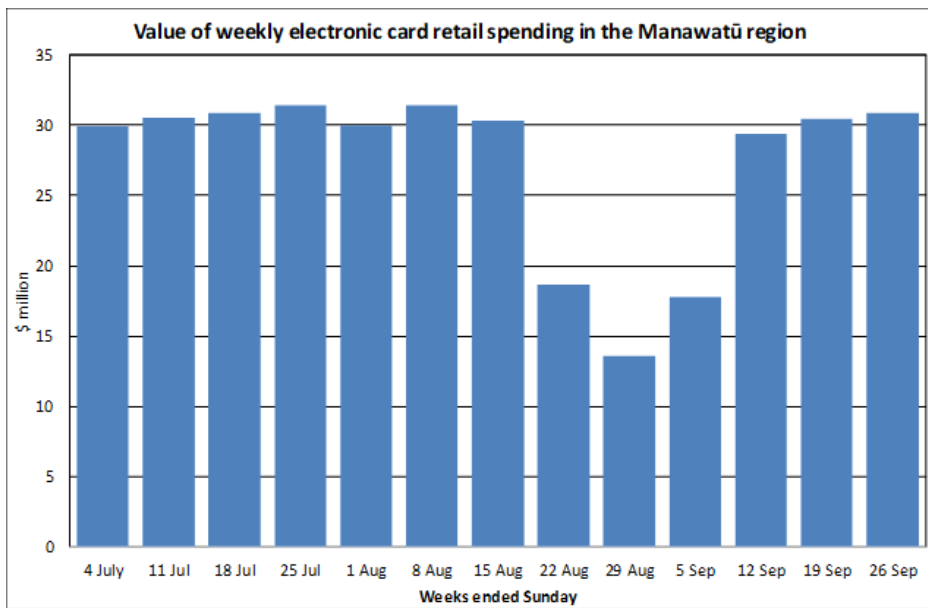
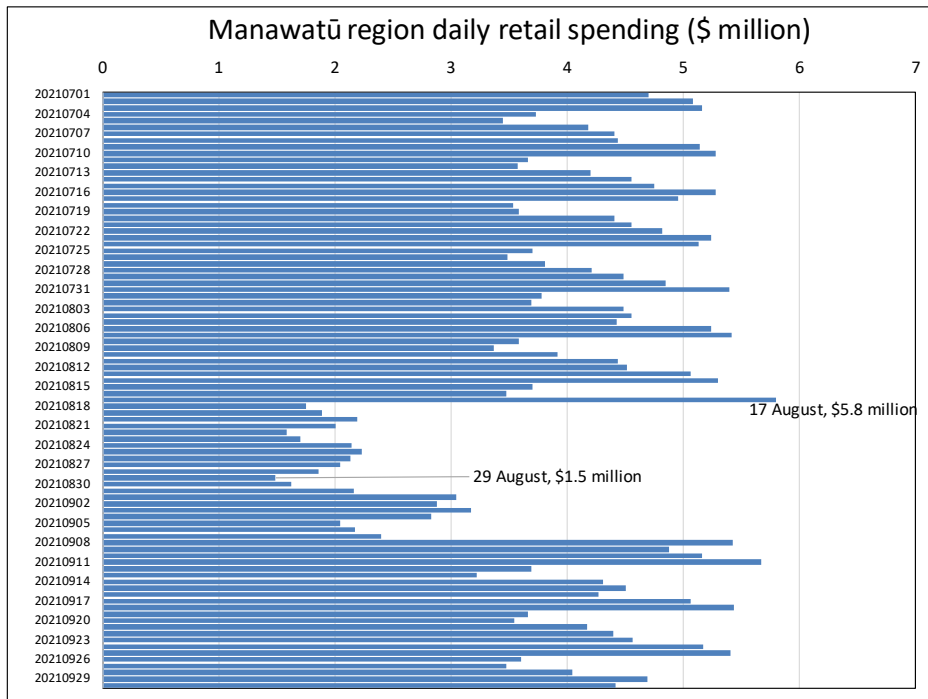
Spending in Manawātū District increased by 11.7% in the year ended September 2021 while the growth rate in Palmerston North was 9.0%.



	September 2021 quarter		Year ended September 2021		
Cardholder origin	Value of spending (\$m)	Change (from same quarter last year)	Value of spending (\$m)	Change (from last year)	% share of spending
Locals	281.3	-4.5%	1,192.7	7.5%	76.3%
Rest of Horizons region	42.6	-9.0%	193.2	14.6%	12.4%
Rest of New Zealand	32.9	-11.3%	163.2	21.2%	10.4%
International	3.7	56.3%	13.2	-12.4%	0.8%
<b>Total spending at Manawātū region merchants</b>	<b>360.4</b>	<b>-5.3%</b>	<b>1,562.2</b>	<b>9.4%</b>	<b>100.0%</b>
<b>Total spending in New Zealand</b>	<b>14,537.2</b>	<b>-8.0%</b>	<b>65,779.0</b>	<b>6.0%</b>	



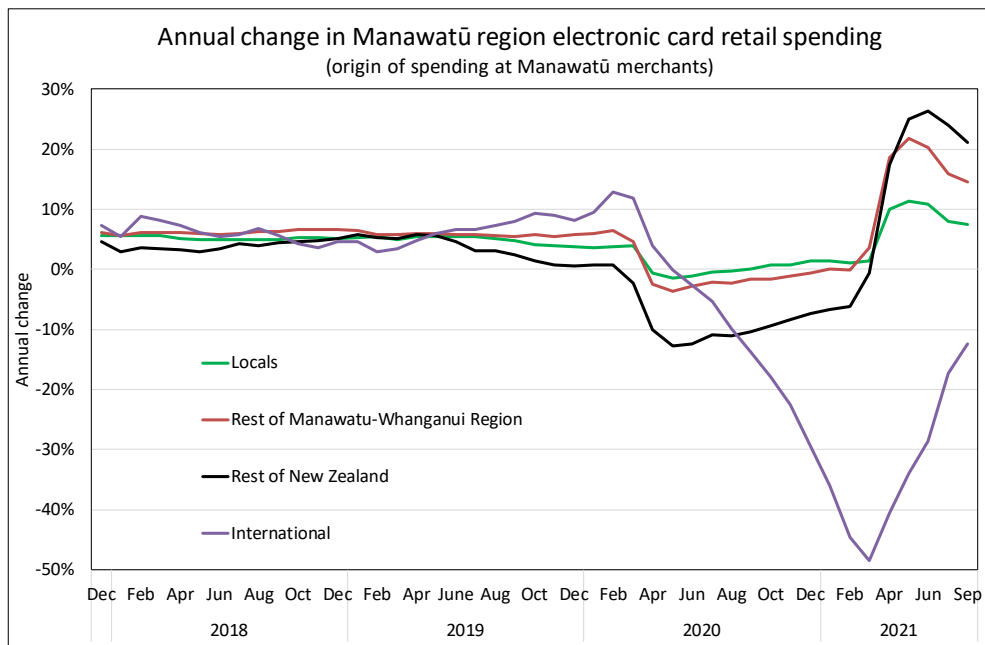
The busiest day for the region is Saturdays, the busiest week in the September quarter was the week ended Sunday 25 July (last week of the July school holidays). The fastest growth category in the quarter was Groceries and liquor (reflecting the impact from the COVID-19 restrictions in August and early September). The day with the highest spend was 17 August – we went into Level 4 restrictions at midnight.



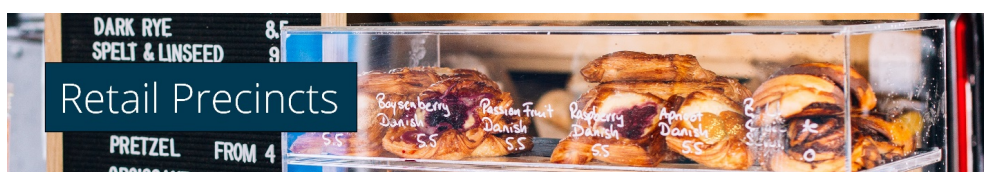




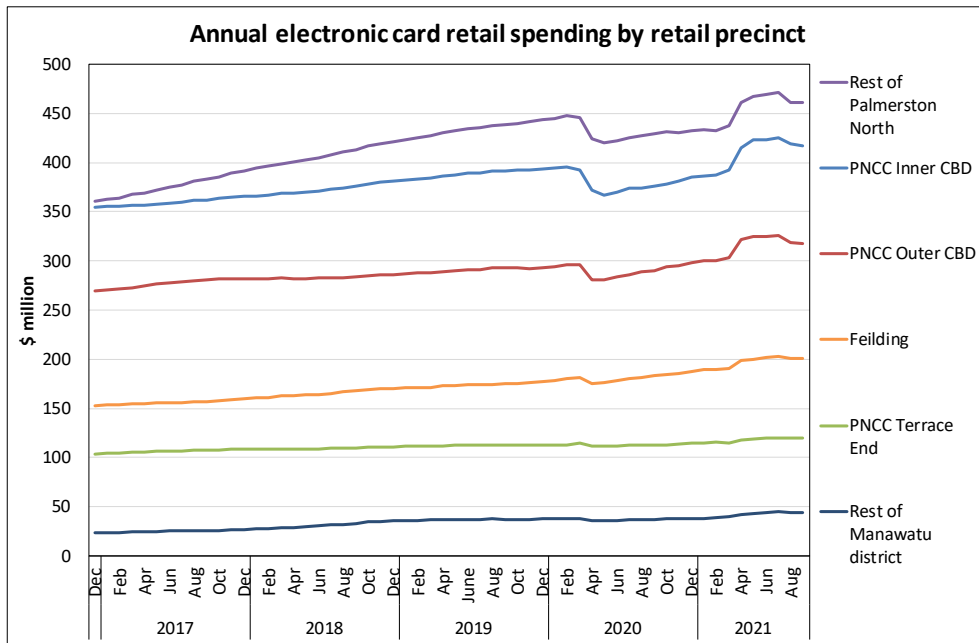
	September 2021 quarter		Year ended September 2021	
Cardholder origin	Value of spending (\$m)	Change (from same quarter last year)	Value of spending (\$m)	Change (from last year)
Resident spending locally	281.3	-4.5%	1,192.7	7.5%
Resident spending outside region	51.0	-11.5%	260.1	18.7%
<b>Total resident spending</b>	<b>332.2</b>	<b>-5.6%</b>	<b>1,452.8</b>	<b>9.3%</b>
Visitor spending	79.1	-8.2%	369.5	16.1%
Net gain in spending for region	28.2	-1.6%	109.4	10.5%
<b>Total spending at Manawatū region merchants</b>	<b>360.4</b>	<b>-5.3%</b>	<b>1,562.2</b>	<b>9.4%</b>
<b>Manawatū region loyalty rate</b>	<b>84.7%</b>		<b>82.1%</b>	
% share of Manawatū region resident spending at Manawatū retailers				
<b>Visitor share of Manawatū region spending</b>	<b>22.0%</b>		<b>23.7%</b>	







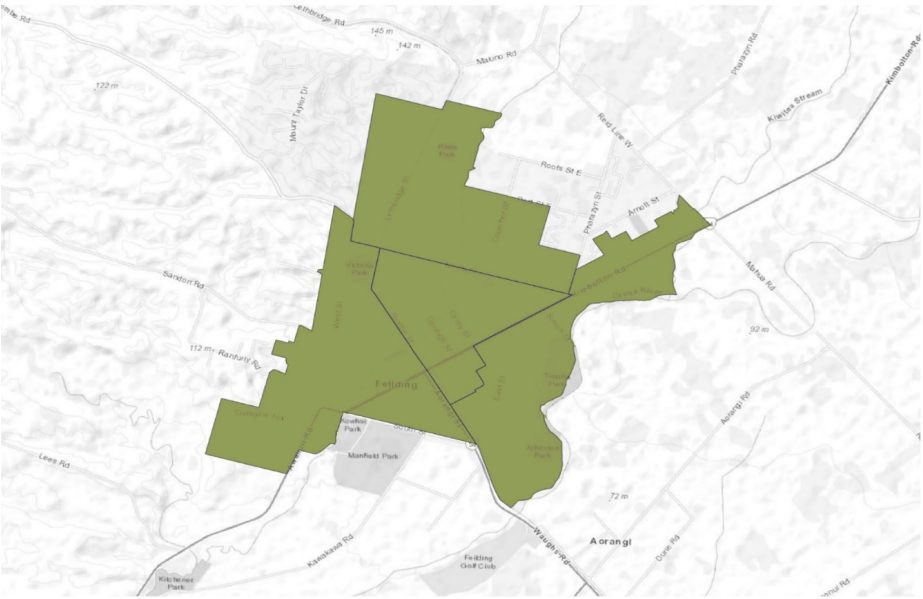
	September 2021 quarter		Year ended September 2021		
Cardholder origin	Value of spending (\$m)	Change (from same quarter last year)	Value of spending (\$m)	Change (from last year)	Precinct % share
Palmerston North Inner CBD	94.8	-5.4%	417.4	11.1%	26.7%
Palmerston North Outer CBD	70.8	-9.0%	317.9	9.4%	20.3%
PNCC Terrace End	29.4	1.8%	120.1	6.5%	7.7%
Rest of Palmerston North	107.6	-7.2%	461.0	7.5%	29.5%
<b>Total Palmerston North</b>	<b>302.5</b>	<b>-6.3%</b>	<b>1,316.3</b>	<b>9.0%</b>	
Feilding	47.7	-0.8%	201.3	10.0%	12.9%
Rest of Manawātū District	10.2	3.3%	44.6	20.2%	2.9%
<b>Total Manawātū district</b>	<b>57.9</b>	<b>-0.1%</b>	<b>245.9</b>	<b>11.7%</b>	
<b>Total Manawātū region</b>	<b>360.4</b>	<b>-5.3%</b>	<b>1,562.2</b>	<b>9.4%</b>	100.0%



Palmerston North Retail Precincts

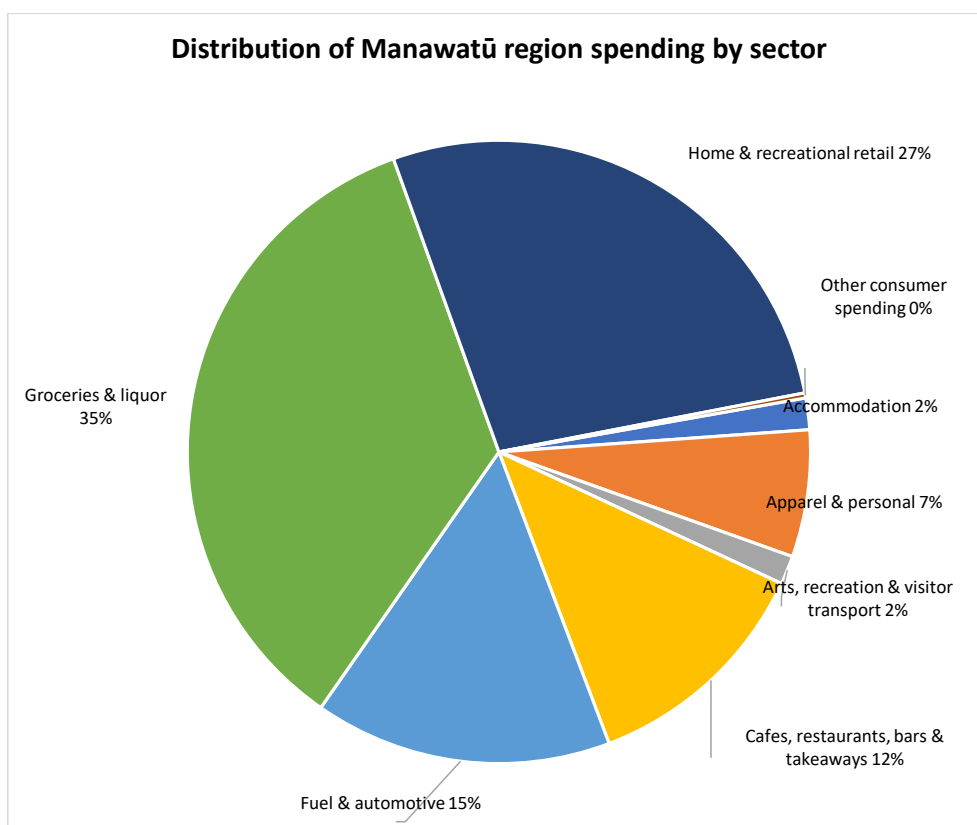


Manawatū District Retail Precincts





Cardholder origin	Manawātū region		New Zealand		Manawātū region share of New Zealand
	Value of spending (\$m)	Change (from last year)	Value of spending (\$m)	Change (from last year)	
Accommodation	25.6	19.3%	1,429.7	-7.7%	1.8%
Apparel & personal	102.9	21.5%	3,984.9	18.5%	2.6%
Arts, recreation & visitor transport	23.2	-20.9%	1,507.4	-24.2%	1.5%
Cafes, restaurants, bars & takeaways	192.3	25.6%	9,319.8	18.9%	2.1%
Fuel & automotive	241.2	12.7%	9,795.9	7.6%	2.5%
Groceries & liquor	543.9	4.7%	23,724.0	3.3%	2.3%
Home & recreational retail	429.0	19.7%	15,675.1	16.1%	2.7%
Other consumer spending	4.1	-7.8%	342.4	18.2%	1.2%
<b>Total</b>	<b>1,562.2</b>	<b>12.9%</b>	<b>65,779.0</b>	<b>8.7%</b>	<b>2.4%</b>



#### Accommodation

#### Apparel & personal

Clothing retailing  
Footwear retailing

Watch & jewellery retailing

Other personal accessory retailing

Hairdressing & beauty services

#### Arts, recreation & visitor transport

**CEDA**  
CENTRAL ECONOMIC  
DEVELOPMENT AGENCY

Interurban & rural bus transport  
 Urban bus transport (including tramway)  
 Taxi & other road transport  
 Rail passenger transport  
 Water passenger transport  
 Air & space transport  
 Scenic & sightseeing transport  
 Passenger car rental & hiring  
 Other motor vehicle & transport equipment rental & hiring  
 Travel agency & tour arrangement services  
 Museum operation  
 Zoological & botanical gardens operation  
 Nature reserves & conservation parks operation  
 Performing arts operation  
 Creative artists, musicians, writers & performers  
 Performing arts venue operation  
 Health & fitness centres & gymnasia operation  
 Sport & physical recreation clubs & sports professionals  
 Sports & physical recreation venues, grounds & facilities  
 Sport & physical recreation admin. & track operation  
 Horse & dog racing administration & track operation  
 Other horse & dog racing activities  
 Amusement parks & centres operation  
 Amusement & other recreation activities n.e.c  
 Casino operation  
 Lottery operation  
 Other gambling activities

#### **Cafes, restaurants, bars & takeaways**

Cafes & restaurants  
 Takeaway food services  
 Catering services  
 Pubs, taverns & bars  
 Clubs (hospitality)  
 Clubs (Hospitality)

#### **Fuel & automotive**

Motor vehicle parts retailing  
 Tyre retailing

Fuel retailing  
 Other automotive repair & maintenance

#### **Groceries & liquor**

Supermarket & grocery stores  
 Fresh meat, fish & poultry retailing  
 Fruit & vegetable retailing  
 Liquor retailing  
 Other specialised food retailing

#### **Home & recreational retail**

Sport & camping equipment  
 Entertainment media retailing  
 Toy & game retailing  
 Newspaper & book retailing  
 Marine equipment retailing  
 Department stores  
 Pharmaceutical, cosmetic & toiletry goods  
 Stationery goods retailing  
 Antique & used goods retailing  
 Flower retailing  
 Other store-based retailing n.e.c.  
 Furniture retailing  
 Floor coverings retailing  
 Houseware retailing  
 Manchester & other textile goods retailing  
 Electrical, electronic & gas appliance retailing  
 Computer & computer peripheral retailing  
 Other electrical & electronic goods retailing  
 Hardware & building supplies retailing  
 Garden supplies retailing

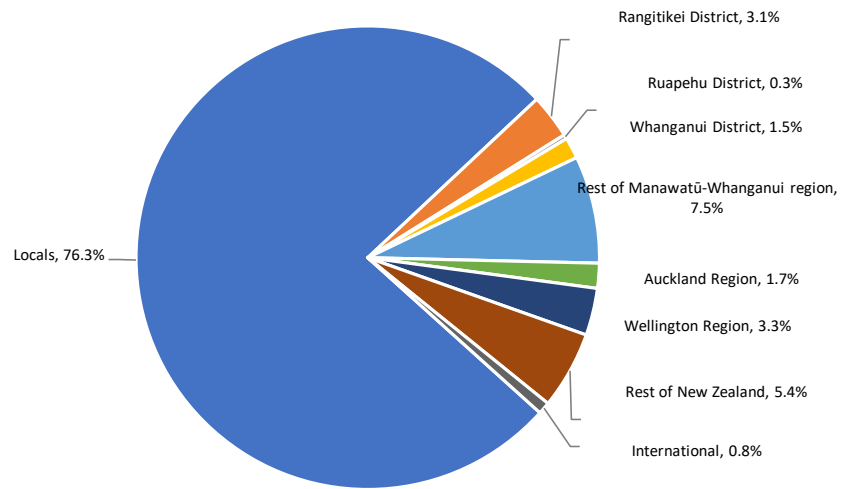
#### **Other consumer spending**

Car retailing  
 Motor cycle retailing  
 Trailer & other motor vehicle retailing  
 Retail commission based buying & selling



	September 2021 quarter		Year ended September 2021		
Cardholder origin	Value of spending (\$m)	Change (from last year)	Value of spending (\$m)	Change (from last year)	% share of spending
Locals	281.3	-4.5%	1,192.7	10.8%	76.3%
Rangitikei District	10.7	-9.3%	48.4	16.3%	3.1%
Ruapehu District	0.9	-23.3%	4.7	21.4%	0.3%
Whanganui District	5.0	-11.7%	23.0	30.6%	1.5%
Rest of Manawatū-Whanganui region	26.0	-7.8%	117.0	20.1%	7.5%
Auckland Region	5.4	-5.1%	27.2	17.8%	1.7%
Wellington Region	10.7	-9.9%	51.4	24.8%	3.3%
Rest of New Zealand	16.8	-14.0%	84.6	30.4%	5.4%
International	3.7	56.3%	13.2	-28.3%	0.8%
<b>Total</b>	<b>360.4</b>	<b>-5.3%</b>	<b>1,562.2</b>	<b>13.0%</b>	<b>100.0%</b>

### Annual customer origin for Manawatū retailers







**CEDA**  
CENTRAL ECONOMIC  
DEVELOPMENT AGENCY

50



## Joint Strategic Planning Committee

Meeting of 09 December 2021

Business Unit: Community  
Date Created: 24 November 2021

### CEDA Statement of Expectations 2022-2023

#### Purpose Te Aronga o te Pūrongo

The purpose of this report is to seek approval for the 2022-2023 Statement of Expectations for the Central Economic Development Agency Limited (CEDA).

#### Significance of Decision Te Hira o te Whakataunga

Neither Council's Significance and Engagement policy is triggered by matters discussed in this report.

#### Recommendations Ngā Tūtohunga

- 1 That the Joint Strategic Planning Committee approves the proposed 2022-2023 Statement of Expectations for the Central Economic Development Agency Limited.
- 2 That the Mayor and Chief Executive of the Manawātū District Council and the Mayor and Chief Executive of the Palmerston North City Council be delegated authority to approve minor amendments to the Statement of Expectations prior to the document being signed.

Report prepared by:

Michael Hawker  
Project Delivery Manager  
Manawatu District Council

David Murphy  
Chief Planning Officer  
Palmerston North City Council

Approved for submission by:  
Lyn Daly  
General Manager - Community

## **1 Background Ngā Kōrero o Muri**

- 1.1 Since the inception of CEDA both Councils have jointly issued a Letter of Expectations. A change to the Local Government Act (2002) now calls it a Statement of Expectations.
- 1.2 The purpose of a Statement of Expectations is to provide CEDA with the Shareholders' focus and priorities for delivery, against its purpose of driving and facilitating the creation and growth of economic wealth in the Manawatū region and beyond.
- 1.3 The Statement of Expectations were modified for the 2021/22 year to reflect the change in funding arrangements by PNCC and the enhanced focus on the Central NZ Distribution Hub, Palmerston North Integrated Transport Initiative and new Food and Fibre Strategy. The 2022/23 statement of expectations rollover the 2021/22 statement of expectations which will ensure continuity for CEDA as they move forward under a modified board and new Chief Executive.

## **2 Discussion and Options considered Ngā Matapakinga me ngā Kōwhiringa i Wānangahia**

- 2.1 The Proposed Statement of Expectations is attached. It covers:
  - Strategic Relationships
  - Strategic Priorities of inward investment, developing a talent pipeline, and domestic visitation.
  - Indicators of the health of the regional economy
  - Stakeholder engagement.

## **3 Te Kīwai (o te kete)**

- 3.1 There are no known cultural considerations associated with the matters addressed in this report. No engagement with Māori is necessary.

## **4 Community Engagement Te Whai Wāhitanga mai o te Hapori**

- 4.1 There is no consultation required for this report. CEDA have been consulted in the development of the proposed Statement of Expectations 2022-2023.

## **5 Operational Implications Te Whai Pānga Atu ki ngā Kaupapa Mahi**

- 5.1 CEDA uses the Statement of Expectations as a key input into the development of its Statement of Intent. The draft Statement of Intent must be delivered on or before 1 March 2022.

## **6 Financial implications Te Whai Pānga Atu ki ngā Kaupapa Ahumoni**

- 6.1 Each Council makes budgetary provision for the contracted services from CEDA.

## **7 Statutory Requirements Ngā Here ā-Ture**

- 7.1 Prior to November 2019 there were no Statement of Expectations provisions in the Local Government Act (2002). A Letter of Expectations has been prepared for CEDA each year as a matter of good practice recommended by the Office of the Auditor General. Section 64B now states that “The shareholders in a council-controlled organisation may prepare a statement of expectations”.
- 7.2 Section 64B (3) obliges both Councils to publish the Statement of Expectations on their internet sites.

## **8 Delegations Te Mana Whakatau**

- 8.1 In relation to the Central Economic Development Agency Limited (CEDA), the Joint Strategic Planning Committee has the following functions, powers, and duties under the Local Government Act 2002 and/or the Companies Act 1993:
- To adopt a policy that sets out the process for the identification, appointment and remuneration of directors;
  - To appoint and remove a person or persons to be directors of CEDA;
  - To approve the remuneration to be paid to directors of CEDA;
  - To undertake performance monitoring of CEDA, as per section 65 of the Local Government Act 2002;
  - To agree with the Statement of Intent of CEDA or, if the Joint Committee does not agree, to take all practical steps to require a Statement of Intent to be modified, as per section 65 of the Local Government Act 2002.
  - To receive the half yearly report of CEDA, as shareholder;
  - To receive the Annual Report of CEDA, as shareholder.
- 8.2 The previous Letters of Expectation have been approved by the Joint Strategic Planning Committee as they are implicitly part of the Statement of Intent process which the Committee has explicit delegated authority to process. This Statement of Expectations is being presented to the Committee in continuation of that process. There would be value in the delegation to the Committee being updated to explicitly include the consideration of the Statement of Expectations.

## **9 Conclusion Whakatepenga**

- 9.1 It is recommended that the proposed Statement of Expectations is approved. The Committee may wish to refine the Statement of Expectations.

## **10 Attachments Ngā Āpitihanga**

- Proposed CEDA Statement of Expectations 2022-2023



December 2021

Malcolm Bailey  
Chair  
Central Economic Development Agency Ltd  
Level 1/1-19 Fitzherbert Avenue  
**PALMERSTON NORTH 4410**

Dear Malcolm

### **CEDA Statement of Expectations 2022-2023**

The purpose of this Statement of Expectations is to provide CEDA with the Shareholders' focus and priorities for delivery, against its purpose of driving and facilitating the creation and growth of economic wealth in the Manawatu region and beyond.

When working beyond the Manawatu, there must be a causal link of the outcomes or benefits back to the Manawatu region based on the core functions and measures of success outlined below.

It is also expected that CEDA will use this letter to guide the development of the Statement of Intent (SOI) for 2022-2023.

### **Strategic Relationships**

Taking a leadership position and building strategic relationships in the Manawatu region and beyond, is fundamental for CEDA to achieve its purpose. CEDA must be relationship-driven at all levels and we appreciate your commitment to this. From our perspective (both as shareholders and partners), this means CEDA developing a deep understanding of the roles of its strategic partner organisations, what their priorities and strengths are, and how CEDA can add value to the relationship (and vice versa) to achieve better economic outcomes for the region.

CEDA formalising these strategic relationships, is important to us as shareholders, to ensure we have cohesion in the region around economic development activities. We would like this to be driven further by CEDA through mutually agreed partnership agreements or similar, to ensure everyone is on the same page and provide the basis for a consistent and collective approach with measurable outcomes.

Ongoing review of the existing strategic partnership agreements already in place is expected.

The shareholders have identified the following strategic partners for CEDA: Palmerston North City Council, Manawatu District Council, Iwi, Manawatu Chamber of Commerce, Talent Central, The Factory, and key central government agencies.

The Shareholders and CEDA will continue to work together to update the existing list of strategic partners.

There may be opportunities for CEDA to leverage existing strategic relationship agreements entered into by the shareholders, e.g. Councils and NZ Defence Force.

### **Key Agreed Functions and Outcomes**

We understand that to be effective, CEDA must be able to focus on key outcomes within a well-defined mandate. We also recognize this is a challenge given historical expectations and activities undertaken by CEDA's antecedent organisations, along with differing stakeholder expectations.

This means CEDA focusing on the delivery of its core functions and outcomes in:

- Inward investment (both national and international), retention and expansion of business in the Manawatu region, along with survival and recovery of businesses due to COVID-19.
- Developing a talent pipeline.
- Domestic Visitation (due to impacts from COVID-19).

Top priorities for MDC are:

- Promotion and development of key tourism and visitor destinations, including the country road tourism route.
- Increase Inward investment for Manawātū district.
- Promote Manfeild as a venue for business conferences and events and where appropriate integrate this with the promotion of business conferences and events undertaken by PNCC.
- Regional Identity implementation.
- CEDA to respond with identified ways for CEDA to contribute to the labour supply for farms.

Top priorities for PNCC are:

- Implementation of the Central NZ Distribution Hub Strategy.
- Support advocacy on the Palmerston North Integrated Transport Investment project.
- Increased investment in Palmerston North city.

A specific joint priority of MDC and PNCC is:

- Develop a Food and Fibre Strategy that addresses the total value chain from primary production, farmers and growers to agri-business clusters, e.g. rural banks, real estate, insurance, vets, sale yards, stock firms, grain & seed merchants, agri-retail and rural tourism with a Manawatu District focus, through to agri-tech & science, including supporting Food HQ with its aspirations.

In balancing the priorities of each council within its resources, CEDA is expected to adhere to its purpose in the constitution of "driving and facilitating the creation and growth of economic wealth in the Manawātū region and beyond" and take into

account the priorities identified in regional strategic planning documents, including the Regional Spatial Plan.

While International Education is now a function that primarily sits with Palmerston North City Council, the shareholders expect CEDA to continue to consider the aspirations of the International Education sector with respect to the delivery of its other core functions.

Action plans to deliver on these core functions should identify KPIs based on clear intervention logic.

It is expected that CEDA will work very closely with key stakeholders of the regions strengths of research/agri-food/agri-business/land/horticulture, distribution and logistics, defence, health, visitor, education (domestic and international), digital and technology, and a growing Māori economy.

CEDA is expected to scan for new opportunities, whether or not it is a key strength, where this can benefit the region.

CEDA's success will be measured by the shareholders using the following indicators of the health of the regional economy:

- Job growth
- Increase in median household income
- Number of investment leads and deals secured
- Strength of the relationship with strategic partners

The shareholders acknowledge that the first two measures are not directly under CEDA's control. Significant changes in international and national economic factors will be taken into account when the Shareholders measure CEDA's performance.

Understanding the strategic drivers of the Councils and aligning CEDA's core functions to those drivers is critical to the partnership between the Councils and CEDA. The Councils have a key role in setting the economic environment for business to flourish and CEDA acts on the Councils behalf in facilitating opportunities for improved economic outcomes. CEDA is the Councils Agency for the delivery of economic development across the region.

Therefore, it is expected that CEDA will engage with the Councils in the development and implementation of their strategies and plans (such as Inward Investment Strategy, Labour Market Plan, Visitor Strategy and Māori Engagement Plan). These strategies and plans are expected to demonstrate active engagement with other strategic partners in their development.

The Councils are obliged to ensure that our services are delivered effectively and efficiently. As a Council-Controlled Organisation (CCO), this expectation extends to CEDA. The Shareholders require CEDA to provide an activity-based budget so the Council can effectively communicate levels of service and value for money to their ratepayers. In addition, there are many opportunities where shared resourcing, expertise and services should be explored and we would like to discuss these opportunities from both a short-term and long-term perspective.

To ensure the Shareholders and CEDA are on the same page, the focus, scope of activity, and priorities will be set through the Statement of Intent (SOI), and delivery managed through any relationship agreement that is put in place.

The shareholders expect that where CEDA is marketing the Manawatu region and this requires differentiating between the Manawatu, Feilding and Palmerston North, that this will continue to be delivered by CEDA in close collaboration with both shareholders.

The Shareholders would like to continue the monthly team meeting between the Mayors, Council CE's and relationship managers with the CEDA Chair and CE, although the purpose and participation at these meetings should be reviewed in collaboration with the shareholders.

The Shareholders would like a quarterly slot on your Board agenda to further build relationships and understanding.

The Shareholders will invite CEDA to report quarterly to the Joint Strategic Planning Committee.

We look forward to working with CEDA to develop an economic development model that successfully delivers. We thank the Board, CEDA CE, and CEDA staff for their continued commitment to economic growth in the Manawatu region.

Yours sincerely

Grant Smith  
**Mayor**  
**PALMERSTON NORTH CITY COUNCIL**

Helen Worboys  
**Mayor**  
**MANAWATU DISTRICT COUNCIL**





**AGREEMENT IN RELATION TO THE RE-ESTABLISHMENT OF THE  
MANAWATŪ DISTRICT AND PALMERSTON NORTH CITY JOINT  
STRATEGIC PLANNING COMMITTEE**

**PARTIES:**

**MANAWATŪ DISTRICT COUNCIL**

**and**

**PALMERSTON NORTH CITY COUNCIL**

**DATED: 21 NOVEMBER 2019**

**Agreement in Relation to the Re-establishment of the Manawatū District and Palmerston North City Joint Strategic Planning Committee**

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Dated: 21 November 2019

**Parties:**

1. Manawatū District Council (referred to as MDC)
2. Palmerston North City Council (referred to as PNCC)

**Background**

- A. The Manawatū District and Palmerston North City Joint Strategic Planning Committee that existed during the 2016-2019 triennium was deemed discharged as at the local authority elections held 12 October 2019.
- B. The Local Government Act 2002 (referred to as the Act) requires an agreement to be made between MDC and PNCC before any joint committee can be established or re-established.
- C. MDC and PNCC now wish to record their agreement on matters required by the Act to be agreed upon before the Manawatū District and Palmerston North City Joint Strategic Planning Committee (referred to as the Joint Committee) can be re-established.

**The Parties Agree:**

1. The requirements and procedures, as set out in the following clauses, will apply for the re-establishment and operation of the Joint Committee.
2. The Joint Committee will be a joint committee as permitted by Clauses 30 and 30A of Schedule 7 to the Act and, as such, is deemed to be a committee of both the Manawatū District Council and the Palmerston North City Council (collectively referred to as the Councils).
3. The Terms of Reference of the Joint Committee are:
  - a. To address strategic planning issues that impact on both Manawatū District and Palmerston North City, in particular issues relating to but not restricted to infrastructure, land use planning and economic development.
  - b. To consider community planning and community outcomes implications. For the purpose of the Joint Committee's Terms of Reference, "Strategic Planning Issues" mean those that are referred to the Joint Committee by either MDC and/or PNCC, taking an inter-regional perspective.
  - c. To consider and promote the creation and growth of economic wealth for Manawatū and beyond, with particular reference to the activities of the Central Economic Development Agency Limited.
4. The Joint Committee will have recommending status only, other than the power:
  - a. To appoint and discharge subcommittees and working parties as it considers appropriate, and to delegate any of its functions or duties to subcommittees so appointed; and

**Agreement in Relation to the Re-establishment of the Manawātū District and Palmerston North City Joint Strategic Planning Committee**

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- b. To make decisions on meeting procedures where such decisions are either required or permitted by Standing Orders or relevant legislation.
  - c. In relation to the Central Economic Development Agency Limited (CEDA), the Joint Strategic Planning Committee has the following functions, powers, and duties under the Local Government Act 2002 and/or the Companies Act 1993:
    - i. To adopt a policy that sets out the process for the identification, appointment and remuneration of directors;
    - ii. To appoint and remove a person or persons to be directors of CEDA;
    - iii. To approve the remuneration to be paid to directors of CEDA;
    - iv. To undertake performance monitoring of CEDA, as per section 65 of the Local Government Act 2002;
    - v. To agree with the Statement of Intent of CEDA or, if the Joint Committee does not agree, to take all practical steps to require a Statement of Intent to be modified, as per section 65 of the Local Government Act 2002.
    - vi. To receive the half yearly report of CEDA, as shareholder;
    - vii. To receive the Annual Report of CEDA, as shareholder.
- 5. The Joint Committee will comprise ten members, being:
  - a. The Mayor of MDC;
  - b. The Mayor of PNCC;
  - c. Four appointees of MDC; and
  - d. Four appointees of PNCC.
- 6. The Joint Committee will appoint and may remove a Chairperson and Deputy Chairperson, one of whom will be the Mayor or a Councillor of MDC and the other the Mayor or a Councillor of PNCC.
- 7. The quorum of the Joint Committee will comprise six members of the Joint Committee, including at least three elected members (the Mayor and/or other Councillors) from each of the Councils.
- 8. Each of the Councils will be responsible for the payment of travel expenses for their respective appointees.
- 9. Meetings of the Joint Committee will be held at intervals of three months. Other meetings may be held at other times as arranged.
- 10. The Councils will share administrative work associated with the Joint Committee on the basis that one Council is responsible for providing administrative services for the Joint Committee for a full triennium and the other Council for the following triennium. The changeover date for such administration will be the date of the local authority elections.
- 11. Meetings of the Joint Committee will be conducted according to the Standing Orders of MDC, except as stated otherwise in this Agreement.

**Agreement in Relation to the Re-establishment of the Manawātū District and Palmerston North City  
Joint Strategic Planning Committee**

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12. The provision in MDC Standing Order 19.3 allowing a casting vote for the person presiding at a meeting in the case of an equality of votes, shall not apply to meetings of the Joint Committee.
13. Elected members of either of the Councils who are not members of the Joint Committee are nonetheless entitled to receive meeting notices and agenda, and to attend and speak at Joint Committee meetings.
14. Recommendations made by the Joint Committee will be reported immediately to the Councils for adoption. Minutes of meetings of the Joint committee will be reported to the following ordinary meeting of the Joint Committee for confirmation as a correct record.
15. This Agreement may be varied when resolutions to that effect have been made and adopted by both of the Councils.
16. The Joint Committee will be deemed to be discharged as at the date of the next local authority elections but it may be recommended to both incoming Councils that a new joint committee be established according to the same or similar arrangements as set in this Agreement and as may be agreed upon by the Councils before any such new committee is established.
17. This Agreement comes into force immediately following the signing of this Agreement, at which time the respective Chief Executives for the Councils will report that this Agreement has been signed, enabling MDC and PNCC to then separately pass resolutions establishing the Joint Committee in accordance with the terms of this Agreement and, where applicable, appointing their members to it.

**Signed by the Parties:**

Signed on behalf of  
Manawātū District Council



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Dr Richard Templer  
Chief Executive

Signed on behalf of  
Palmerston North City Council

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Heather Shotter  
Chief Executive

### 3.39 Governance Delegations – Manawatū District / Palmerston North City Joint Strategic Planning Committee

#### Terms of Reference

##### Responsibilities

- a. To address strategic planning issues that impact on both Manawatū District and Palmerston North City, in particular issues relating to but not restricted to infrastructure, land use planning and economic development.
- b. To consider community planning and community outcomes implications. For the purpose of the Joint Committee's Terms of Reference, "Strategic Planning Issues" mean those that are referred to the Joint Committee by either MDC and/or PNCC, taking an inter-regional perspective.
- c. To consider and promote the creation and growth of economic wealth for Manawatū and beyond, with particular reference to the activities of the Central Economic Development Agency Limited.

##### Delegated Authority

The Joint Committee will have recommending status only, other than the power:

- a. To appoint and discharge subcommittees and working parties as it considers appropriate, and to delegate any of its functions or duties to subcommittees so appointed; and
- b. To make decisions on meeting procedures where such decisions are either required or permitted by Standing Orders or relevant legislation.
- c. In relation to the Central Economic Development Agency Limited (CEDA), the Joint Strategic Planning Committee has the following functions, powers, and duties under the Local Government Act 2002 and/or the Companies Act 1993:
  - i. To adopt a policy that sets out the process for the identification, appointment and remuneration of directors;
  - ii. To appoint and remove a person or persons to be directors of CEDA;
  - iii. To approve the remuneration to be paid to directors of CEDA;
  - iv. To undertake performance monitoring of CEDA, as per section 65 of the Local Government Act 2002;
  - v. To agree with the Statement of Intent of CEDA or, if the Joint Committee does not agree, to take all practical steps to require a Statement of Intent to be modified, as per section 65 of the Local Government Act 2002.
  - vi. To receive the half yearly report of CEDA, as shareholder;
  - vii. To receive the Annual Report of CEDA, as shareholder.

Recommendations made by the Joint Committee will be reported immediately to the Councils for adoption. Minutes of meetings of the Joint committee will be reported to the following ordinary meeting of the Joint Committee for confirmation as a correct record.

##### Membership

The Mayor and four elected members from each Council:

*Manawatū District Council representatives:*

Her Worship the Mayor Helen Worboys and Councillors Steve Bielski, Michael Ford, Grant Hadfield and Phil Marsh

*Palmerston North City Council representatives:*

His Worship the Mayor Grant Smith and Councillors Aleisha Rutherford, Susan Baty, Leonie Hapeta and Zulfiqar Butt

Chairperson: Mayor Helen Worboys

Deputy Chairperson: Mayor Grant Smith

### **Quorum**

The quorum of the Joint Committee will comprise six members of the Joint Committee, including at least three elected members (the Mayor and/or other Councillors) from each of the Councils.

### **Meeting Cycle**

Meetings held quarterly, in March, June, September and December on the second Thursday of the month at 1:00pm, with additional meetings convened when necessary.