

Regional Economic Activity Report

2015





**MINISTRY OF BUSINESS,
INNOVATION & EMPLOYMENT**
HĪKINA WHAKATUTUKI

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Regional information at your fingertips

The Regional Economic Activity Report mobile app for smartphones makes access to economic information on regions easy and immediate.

Key figures and charts quickly highlight essential data on household income, house prices, rents, employment rates, population and GDP. The charts put all this data in context, with time series illustrating trends, and theme screens allowing rapid comparison between regions. Anyone interested in finding out more about their region and other regions will find the mobile app highly informative and easy to use.

The Regional Economic Activity Report online web tool enables comparison of regional data in maps and dynamic charts. Exploration of the data is made easy by the many options the web tool gives for displaying and comparing it. Analysts and those wanting a more in-depth tool for exploring regional data will find the web tool highly useful.

Both the mobile app and the web tool are updated as new data becomes available.

The mobile app can be downloaded to Apple and Android smartphones from the iTunes App Store and Google Play.

The web tool is available on the MBIE website:
[http://www.mbie.govt.nz/info-services/
business/business-growth-agenda/regions](http://www.mbie.govt.nz/info-services/business/business-growth-agenda/regions)



Google Play



iTunes App Store

Minister's foreword

New Zealand's economy is built upon its regions, each of which has different specialisations, building on its unique combination of natural resources, infrastructure and skills. Every region has an important role to play in New Zealand's continued growth.

Lifting New Zealand's overall economic performance requires an understanding of the resources, strengths, and challenges in each of the regions. To build that understanding, I launched the first of an annual series of regional economic activity reports in 2013. This is the third report in the series.

The reports provide high-quality, consistent data that allows us to compare regional performance and better understand the roles that different regions play in the New Zealand economy. They support decision-making at all levels and help generate discussion on how best to build our future.

For the first time, we are providing a purpose-built mobile app to accompany this report. This allows users to quickly access key regional data on topics such as household income, house prices, rents, employment, population and GDP. Time series charts illustrate trends, while theme screens allow rapid comparisons between regions.

For those wanting a more in-depth understanding of regional economies, we are also providing an interactive web tool. This enables comparison of regional data through maps and dynamic charts, and gives users a number of options to explore and investigate. Both the mobile apps and the web tool are updated as new data becomes available.

This report contains a range of new data. The Ministry of Business, Innovation and Employment has developed new estimates of GDP at a territorial authority level, as well as new estimates of regional household income.

Two years on from the first Regional Economic Activity Report we are seeing further evidence of the regions and New Zealand continuing to prosper, moving beyond the impacts of the worldwide recession. New Zealand has one of the best-performing economies in the OECD, and every region has played a role in creating that outcome.

The Government is working to ensure that New Zealand as a whole, and each of the 16 regions, continue to grow and succeed. We have a comprehensive two-pronged approach to regional economic development.

Firstly, the Business Growth Agenda (BGA) is designed to lift economic growth across the country. The BGA

recognises the importance of regions, as well as the importance and the strong regional dimension of the Māori economy. The BGA supports a wide-range of region-specific actions, including improved infrastructure, through the Ultra-Fast Broadband and Rural Broadband Initiative programmes, and Roads of National Significance programme; support for businesses and exporters, through the Regional Business Partner network and the Regional Investment Attraction Programme; support for research and innovation, such as the Primary Growth Partnerships and regional research institutes; new tourist attractions, such as the New Zealand Cycle Trail; and programmes to increase regional skill levels, such as the Māori and Pasifika Trades Training Programme.

Secondly, the Regional Growth Programme is a cross-government programme of intensive engagement and support for particular regions with long-standing challenges. To date, the programme has focused on Northland, Bay of Plenty, the East Coast (Gisborne and Hawke's Bay) and Manawātū-Whanganui. For each of these regions, Government has worked with local stakeholders to identify the economic strengths and opportunities of the region, including sector specialisations, investment opportunities and how growth can be accelerated. Developing the Māori economy of each of the regions has been a particular focus.



Hon Steven Joyce

Minister for Economic Development
Minister of Science and Innovation
Minister for Tertiary Education, Skills and Employment
Minister for Regulatory Reform
Associate Minister of Finance



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Regional Economic Outcomes



Regional Economic Outcomes

The New Zealand economy is by definition the sum of its sixteen regional economies. Each region has differing economic strengths and challenges, and makes distinct contributions to the country’s overall growth.

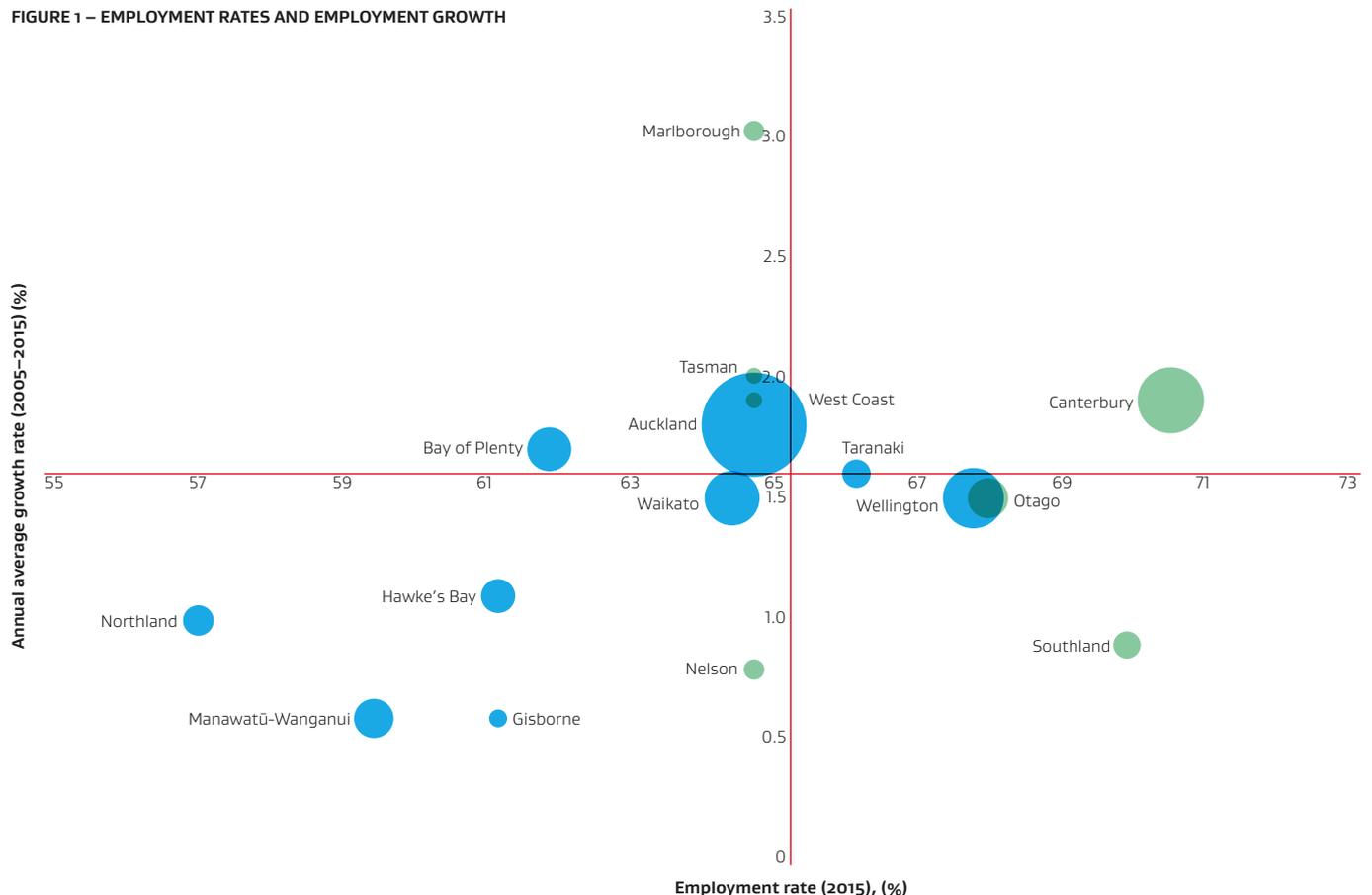
Our major cities of Auckland, Wellington and Christchurch account for almost two-thirds of national GDP, and are hubs for commercial services, as well as the infrastructure that links New Zealand to the world. New Zealand’s rural regions have long been the drivers of primary production, drawing on their rich natural resource base to generate exports. Across the entire country, New Zealand entrepreneurs are building on the existing strengths of their region; by identifying new opportunities for manufacturing and service exports.

The economic performance of regions varies significantly, and has done for some time. The regional GDP series shows that New Zealand’s regional economies have been growing strongly since the Global Financial Crisis, and in 2014, many rural-based regions grew faster than their urban counterparts. There are, however, some long-standing issues

relating to economic performance within particular regions. In many instances, the challenges facing a particular region may stretch back over many decades and reflect persistent structural issues. External influences, such as world commodity prices and climate, can have a significant bearing on regional industries and the income and jobs they generate. This is particularly true for regions with a high dependency on primary production.

A good way of demonstrating which communities face the biggest economic challenges is to review employment and household income across regions. This chapter provides a high-level overview of the outcomes experienced across New Zealand’s regions, and explores the factors that may underpin those disparities.

FIGURE 1 – EMPLOYMENT RATES AND EMPLOYMENT GROWTH



Living Standards

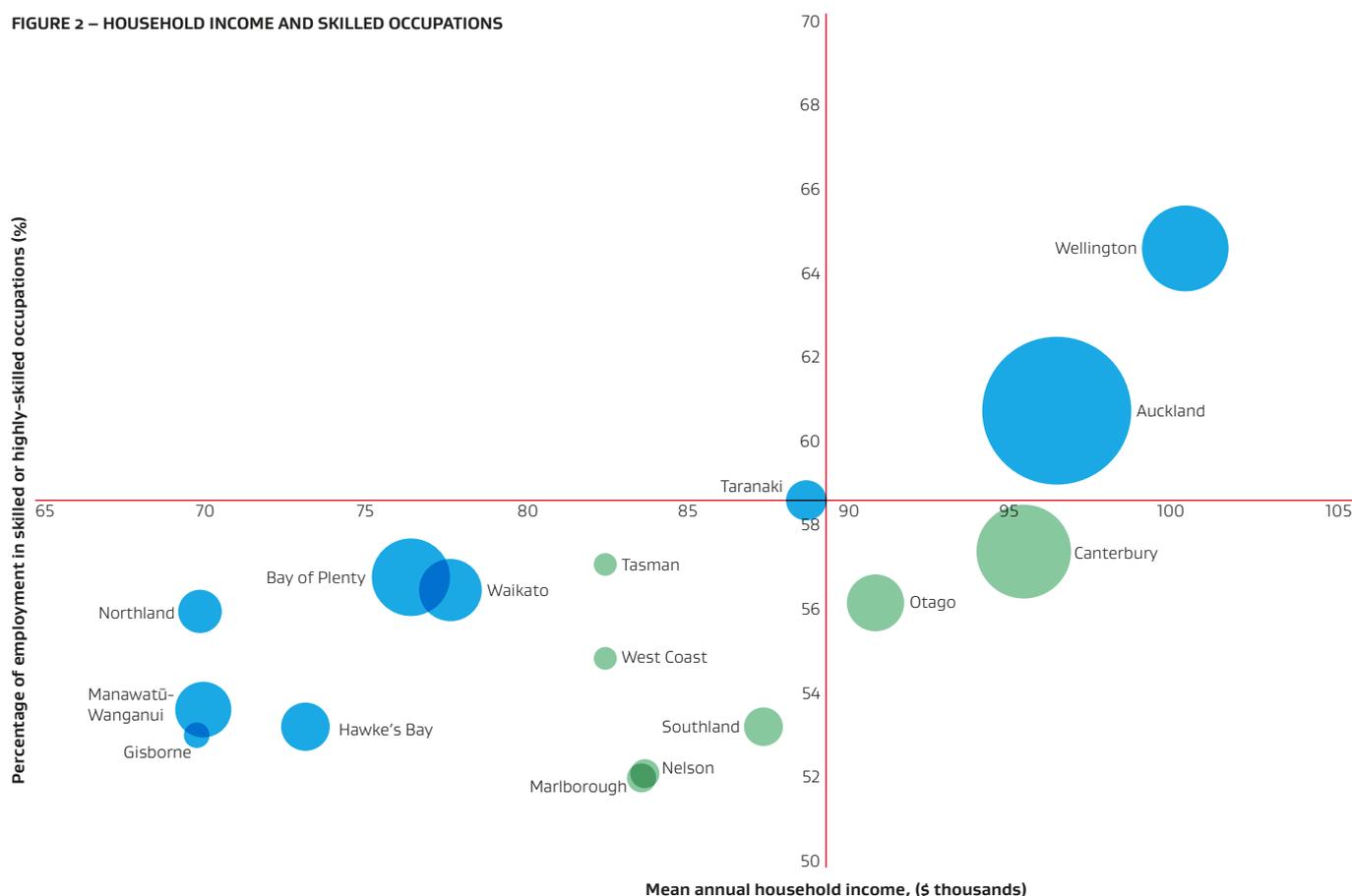
Employment Opportunities

Figure 1 shows different indicators of regional job opportunities: employment rates, and employment growth over the past decade. Employment rates are the proportion of the working-age population (everyone over the age of 15) who are employed. Regions with low employment rates (such as Northland and Gisborne) may have significant groups within the population not participating fully in the economy.

Household Income

Household incomes are highest in the largest, predominately urban, regions of Wellington and Auckland. These areas also have a higher proportion of employment in highly-skilled occupations, and their populations tend to have higher levels of qualifications. Figure 2 shows a possible correlation between the percentage of people in highly-skilled employment, and average annual household income.

FIGURE 2 – HOUSEHOLD INCOME AND SKILLED OCCUPATIONS



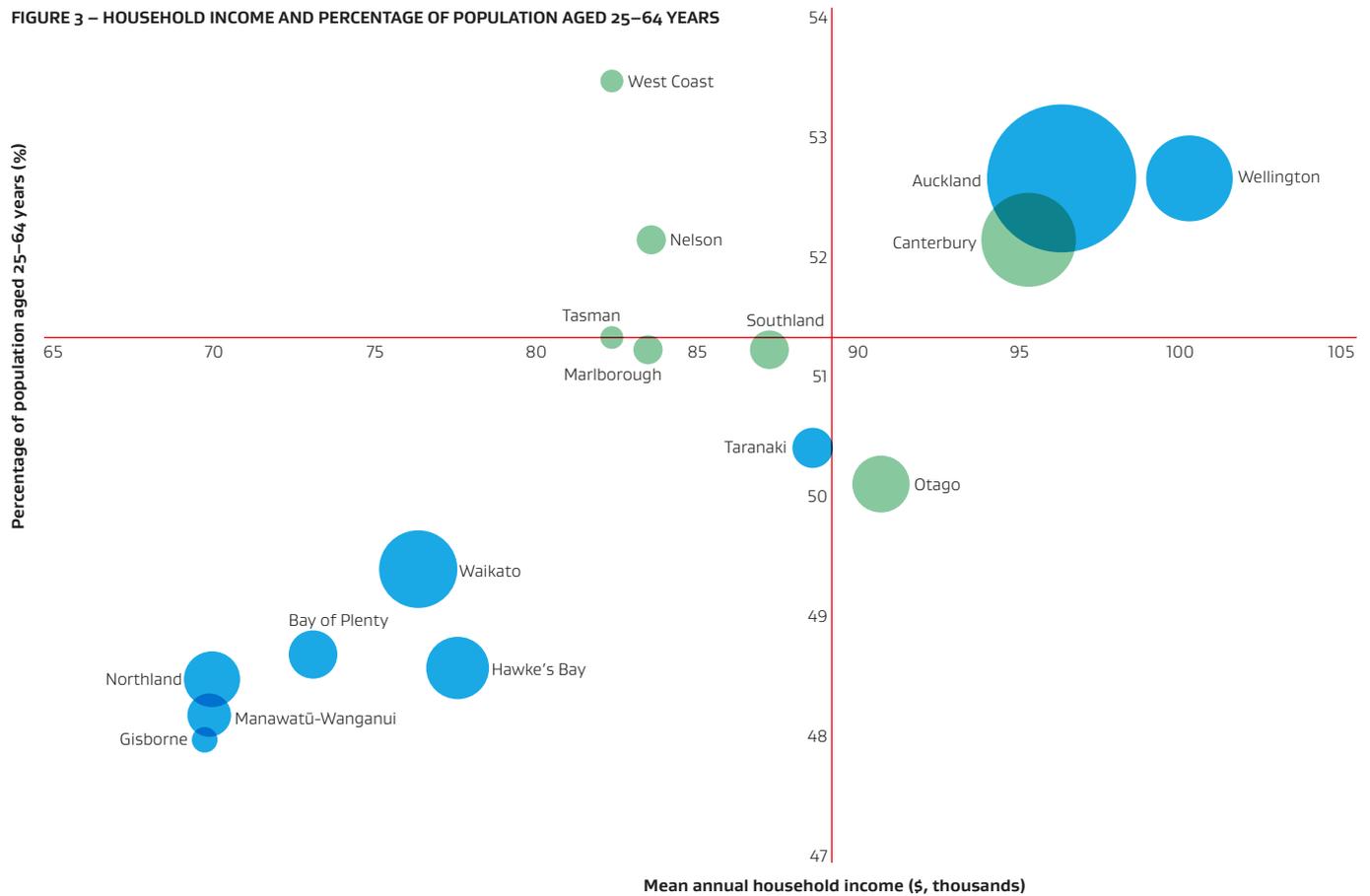
Skill needs, in turn, reflect the industrial structure of the region. Regions with a large primary sector tend to have an above-average proportion of people employed in low-to-medium-skilled occupations, such as general labourers and machine operators. Regions with a large service sector, such as Auckland and Wellington, have above-average proportions of workers in highly-skilled occupations, such as law, finance and engineering.

The availability of skilled people in a regional labour market can be a major constraint on growth, especially when it comes to moving into higher-value manufacturing and services industries. Regional differences in the availability of skills are the result of a number of interrelated factors, including quality of available education services, demographics, and both domestic and international migration. New Zealand's school-level education outcomes are among the best

in the world, although there is a significant tail of underachievement, particularly among Māori, Pacific Peoples, and those from lower socio-economic groups. This long-tail has lasting impacts not only for personal outcomes, but on the overall outcomes for some regions.

Household income is also affected by demographic factors. Regions with high proportions of retired people (such as Marlborough, Northland, Tasman and Bay of Plenty) tend to have lower household incomes, whereas regions with a large share of population in the peak working-age, such as Wellington, tend to have higher household incomes. Figure 3 shows a possible correlation between the proportion of population aged 25–64 years and household incomes.

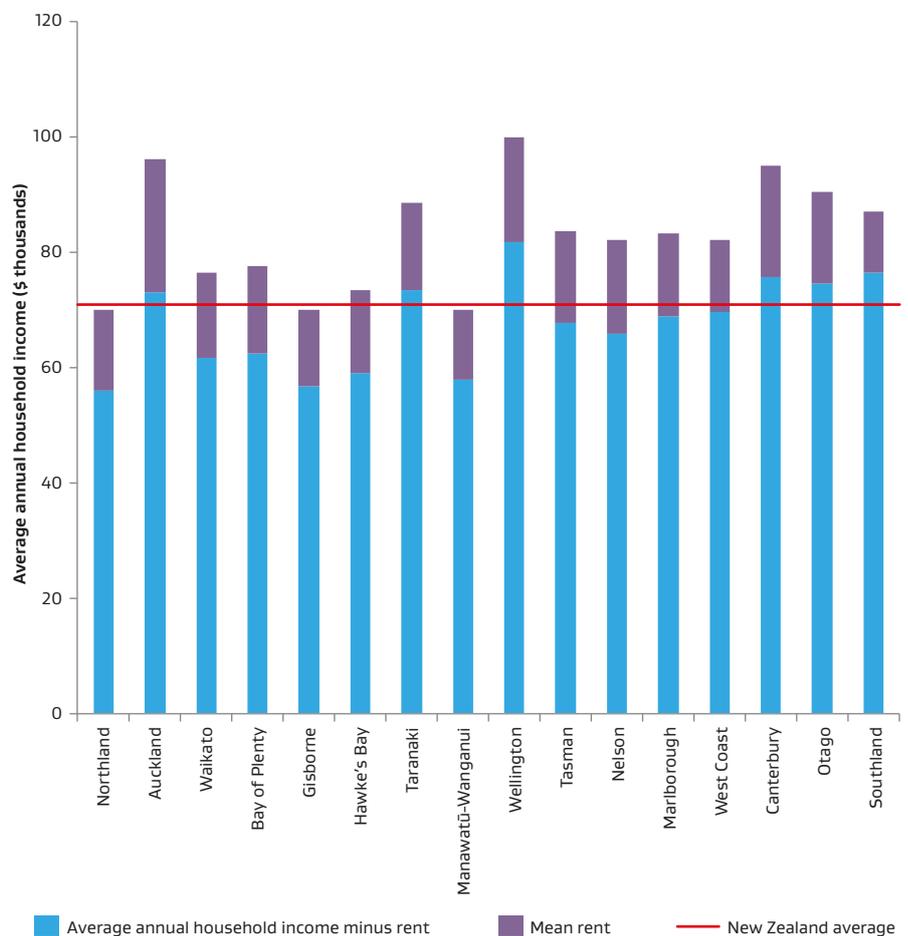
FIGURE 3 – HOUSEHOLD INCOME AND PERCENTAGE OF POPULATION AGED 25–64 YEARS



Cost of Living

Living standards depend not only on household income, but also cost of living. Housing costs are used here as a proxy for the cost of living. Housing costs vary across the country, with lower-income regions also tending to have lower house prices and average rents. Rent as a proportion of average household income varies from 24 per cent in Auckland to 12 per cent in Southland.

FIGURE 4 – AVERAGE HOUSEHOLD INCOME AND RENT



Trends and Outlook

Regional Employment Structure

At a national level, there has been a shift in New Zealand's employment structure over the past decade, with a decline in the manufacturing sector's share of employment, and an increase in employment in the services sector (particularly business services and health and community services). This is an extension of longer-term trends, and can be observed across most advanced economies. The share of employment in utilities and construction has also increased over the past decade, although this is more reflective of recent local developments, such as on-going rebuild activities in Canterbury, and residential and non-residential building work in Auckland and Waikato.

These broad shifts in the industrial and occupational structures of employment have had different effects at a regional level. Regions with a high concentration of employment in industries with a declining share of total employment may experience lower growth, or a decline in total employment. Regions with a high concentration of employment in growing sectors (such as services, construction, and health and community services) are likely to see faster employment growth relative to other regions.

In recent years, regions with large services and construction sectors, such as Wellington, Auckland, Canterbury and Waikato have been most advantaged by the composition of their industrial bases. Northland and Gisborne/Hawke's Bay were noticeably disadvantaged, as they are specialised in industries with low or declining employment.

Shifts in industrial structure have also had an impact on demands for skills. Employment in higher-skilled occupations, particularly professionals, has increased across all regions; whereas employment growth for lower-skilled occupations has been modest or in decline across all regions. This implies that continued employment growth at a regional level requires increasing levels of skills and qualifications.

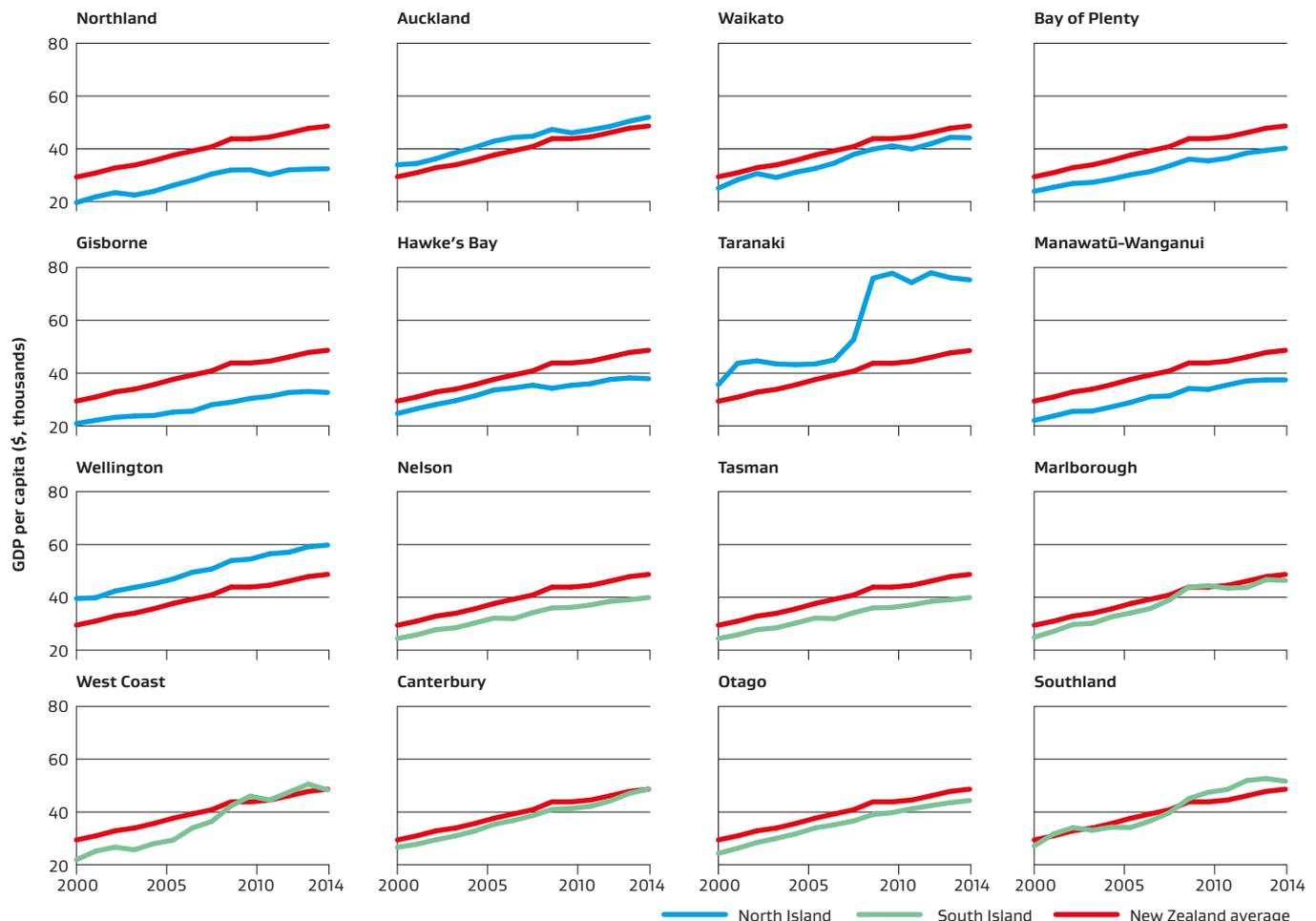
Economic Activity

Regional economies have undergone significant changes in their economic structure over the past decade. Figure 5 shows movements in each region's GDP per capita since 2007, reflecting changes both in the value of regional production and populations.

Until 2013, agricultural regions saw strong GDP growth on the back of high commodity prices, particularly dairy and minerals. Dry conditions saw a drop in agricultural production in 2013 (particularly in the North Island regions of Waikato, Gisborne and Hawke's Bay), a fall that was exacerbated by lower commodity prices.

For the year ending March 2014, economic growth was stronger in rural regions when compared with urban regions. Excluding Canterbury, whose economic activity is dominated by the rebuild, the Wellington and Auckland regions had the smallest increases in regional GDP while Southland, Marlborough and Waikato had the highest increase.

FIGURE 5 – GDP PER CAPITA BY REGION, 2000–2014



Summary

Differences in regional outcomes are the results of a complex interplay of factors, including employment opportunities, demographics, skill levels and education outcomes, and the cost of living.

All regions have the potential to grow and build off their strengths. By increasing our understanding of the drivers and constraints on regional growth, regional stakeholders and government can make better decisions on how best to unlock that potential.

This publication, and the associated web-based information on regional economies, provides an important part of the tool-kit for regions to better understand their local economies. These resources are designed to help people arrive at a common understanding of opportunities and trends, and enter into better informed conversations about how to progress their region's economic performance. These resources can also help conversations between regions – identifying how economic performance is changing over time, and encouraging greater sharing of lessons on what works.

Government Actions to Boost Regional Growth

The Government's Business Growth Agenda (BGA) is designed to lift economic growth across the country, and contains specific current and new initiatives that target regional New Zealand. Most prominent of these is the Regional Growth Programme; a work programme of intensive engagement and support with particular regions that have areas facing long-standing challenges.

The Business Growth Agenda

The BGA is central to delivering a more productive and competitive economy and a stronger and more prosperous New Zealand. The BGA recognises the importance of New Zealand's regions, and it provides the enabling conditions for businesses and regions to become more innovative and productive. The BGA also recognises the importance and the strong regional dimension of the Māori economy. BGA actions that are specifically targeted to regional and Māori economic growth include:

- The Regional Investment Attraction Programme, designed to attract foreign direct investment into key business opportunities in each region. The Government has developed a set of 14 Regional Investment Profiles in partnership with Economic Development Agencies within regions.
- The Ultra-Fast Broadband (UFB) and Rural Broadband Initiative (RBI) programmes, which provide fast broadband connectivity for small-town and rural New Zealand. More than 570,000 users across 32 towns and cities can now connect to UFB, and more than 231,000 rural households now have access to fast wireless broadband, as UFB continues to roll out to smaller, regional towns. The RBI will be extended to areas outside of the UFB footprint with an additional \$100 million. A new Mobile Black Spot Fund of \$50 million will expand mobile coverage to rural and remote areas.
- The Regional Business Partner network, made up of 14 regional organisations, contracted to provide information and advice to New Zealand businesses to help them grow through R&D and exports.
- The Government is establishing Regional Business Hubs; where business advisory entities from central and local government and businesses associations can co-locate and work together to deliver support to businesses.
- The Government is investigating the establishment of regional research institutes located outside Auckland,

Wellington and Christchurch. The Government will work with regional stakeholders to identify the best location opportunities, and has set aside \$25m over three years to support the best proposals.

- The Primary Growth Partnership, which drives research and innovation in the primary industry –which is the foundation of rural economies. The Partnership has completed two programmes, with another 17 currently underway.
- New land productivity programmes to identify and pilot new farming systems and processes to improve financial, animal welfare/health and environmental performance.
- Tourism plays a major role in provincial regions. The Tourism Growth Partnership Fund co-invests in business-driven initiatives to boost innovation and productivity in the tourism sector. To date \$8.1 million has been committed to by the Fund, matched by \$39.2 million of industry co-investment. In addition Nga Haerenga, the New Zealand Cycle Trail is now largely complete, with 23 trails expected to be completed by June 2016. This will create new tourism opportunities in rural and often remote areas.
- A range of programmes are being run to increase Māori land productivity. These include the Māori Agri-Business pathway to productivity programme, which works with owners/trustees of Māori primary sector assets to increase productivity of their assets. In addition the Te Ture Whenua Māori Bill, which is currently being consulted on, aims to facilitate the more productive utilisation of collectively owned Māori land, while ensuring appropriate safeguards.
- Two funds have recently been created to support wider Māori economic development. The \$2 million per year Māori Innovation Fund assists Māori collectives to gain the knowledge needed to realise the economic potential of their assets. Work is also underway to launch the \$30 million Māori ICT Development Fund, which aims to support Māori economic development and language and culture through ICT.
- Improved information about regions has been made available to decision-makers, including the Regional Economic Activity Report series and online tools and the official regional GDP series.
- Programmes to increase skill levels in regions and to ensure skills training matches local business needs, such as the Māori and Pasifika Trades Training programmes which are currently running in 10 regions.

- A new package of immigration policies have been recently launched, aimed at improving the spread of workers, skills and investment across New Zealand. The package includes additional incentives for migrants to locate and invest in rural regions.
- The Irrigation Acceleration Fund that supports investment in irrigation to increase land productivity. Since the Fund was established in 2011, projects involving 100,000 hectares of new irrigation have progressed to the 'investment ready' stage, with others in the concept development stage.
- The Roads of National Significance programme has improved transport linkages between main urban centres and regional economies. This programme is complemented by a number of regional road improvements to support higher economic productivity and growth.

The Regional Growth Programme

The Regional Growth Programme is a cross-government programme identifying and responding to economic growth opportunities in regions that face persistent economic challenges but have strong growth potential. The programme is currently focussed on Northland, Bay of Plenty, East Coast, and Manawatū-Whanganui. The programme also has a particular focus on developing the Māori economy in each of these regions.

The programme involves developing independent growth studies to identify the economic strengths and opportunities for each region, including their sector specialisations, investment opportunities and across the board growth enablers such as skills and transport. Four studies have been completed to date, all revealing strong investment potential. The Government is now working with each region to develop and implement a regionally led action plan in order to leverage the opportunities identified in the studies. A strong collaborative approach from local authorities, business, iwi and central government will help to unlock these opportunities and bring them to fruition.

The Regional Economic Development Ministers (RED Ministers) group was established to oversee the Regional Growth Programme. The RED Ministers group includes the Ministers for: Economic Development, Communications, Transport, Tourism, Social Development, Primary Industries, Small Business and Māori Development. The Ministers group enables an all of Government response in each region and has a key focus on the establishment and progression of each regional action plan.

Regional Growth Studies

Tai Tokerau Northland Regional Growth Study

<http://www.mbie.govt.nz/info-services/sectors-industries/regions-cities/regional-growth-programme/tai-tokerau-northland-regional-growth-study-opportunities-report>

Toi Moana Bay of Plenty Regional Growth Study

<http://www.mbie.govt.nz/info-services/sectors-industries/regions-cities/regional-growth-programme/toi-moana-bay-of-plenty-regional-growth-study-opportunities-report>

East Coast Regional Economic Potential Study

<http://www.mbie.govt.nz/info-services/sectors-industries/regions-cities/regional-growth-programme/east-coast-regional-economic-potential-study>

Manawatū-Whanganui Growth Study

<http://www.mbie.govt.nz/info-services/sectors-industries/regions-cities/regional-growth-programme/manawatu-whanganui-growth-study>





The regions





Northland

Northland is a small-to-medium-sized economy with a prominent primary production and processing base. The region contributes 2.5 per cent of New Zealand's GDP and has 3.7 per cent of New Zealand's population.



Economy

Northland has been struggling to perform in comparison to its resource base and other regions for several decades. Between 2009 and 2014, Northland's economy grew by 13.9 per cent (below the national movement of 22.4 per cent).

Northland has a higher share of employment in the primary sector relative to the rest of New Zealand, particularly in forestry and logging, fishing and aquaculture, dairy farming, and sheep farming. Over the past decade employment in the primary sector has been falling, while strong employment growth has been recorded in health care and social assistance (primarily hospitals) and public administration.

Whangarei District forms the main population hub for the region, and is the service centre for many activities. Around 15 per cent of the district's employment is in health care and social assistance (up from 11 per cent in 2005).

Far North and Kaipara Districts have a strong focus on primary production. Far North has a relatively high level of employment in fishing and aquaculture, forestry and logging, and sheep, beef cattle and grain farming. Kaipara has

relatively high levels of employment in dairy farming, forestry and logging, sheep farming and horticulture.

Māori make a significant contribution to the Northland economy, with Māori making up 23 per cent of the labour force, and Māori business accounting for 13 per cent of total value added in Northland.

Natural Resources

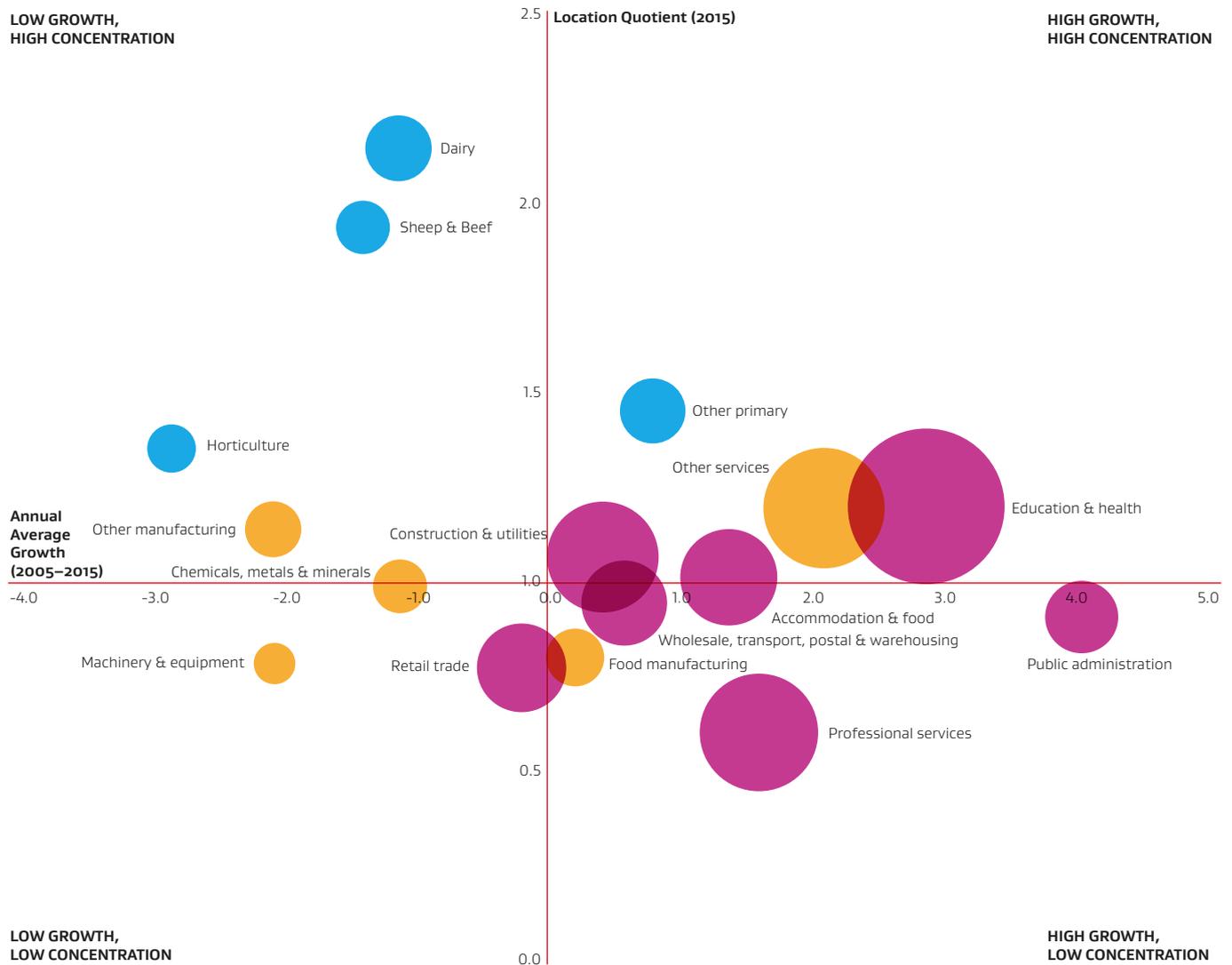
Northland has extensive natural resources and environmental advantages including suitable land for agriculture, horticulture and forestry; warm climate; and a long coastline suitable for aquaculture. Its significant natural and cultural features also contribute to its tourism industry. These resources provide the region with significant untapped potential.

Living Standards and Jobs

Northland has the highest age dependency ratio (proportion of people aged under 15 and over 65) of any New Zealand region, and this is forecast to significantly increase. The region also has the second-lowest labour force participation rate of all New Zealand regions, and the second-lowest employment rate.

EMPLOYMENT BY INDUSTRY

EMPLOYMENT GROWTH AND CONCENTRATION COMPARED TO THE NATIONAL AVERAGE



NOTE: Location Quotient is the proportion of total employment in a given industry and region, divided by the proportion in that industry at a national level

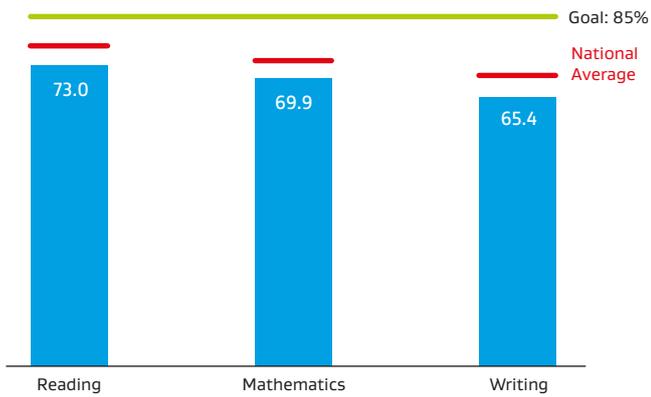
AREAS OF REGIONAL STRENGTH

INDUSTRY	SHARE OF TOTAL EMPLOYMENT			EMPLOYMENT GROWTH 2005-2015, ANNUAL AVERAGE	
	EMPLOYMENT COUNT	NORTHLAND	NZ	NORTHLAND	NZ
Forestry and Logging	615	0.8%	0.2%	3.7%	0.3%
Fishing	290	0.4%	0.2%	-2.7%	-0.7%
Dairy Cattle Farming	2,666	3.6%	1.7%	-1.1%	1.0%
Grain, Sheep and Beef Cattle Farming	1,752	2.4%	1.2%	-1.4%	-2.1%
Electricity, Gas, Water and Waste Services	943	1.3%	0.8%	5.9%	6.3%

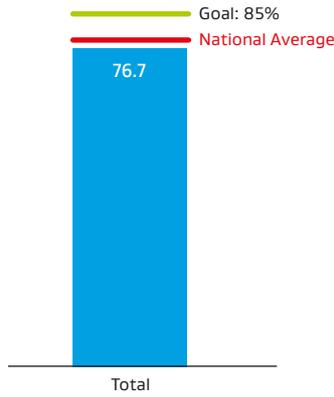
NORTHLAND

SKILLS PIPELINE

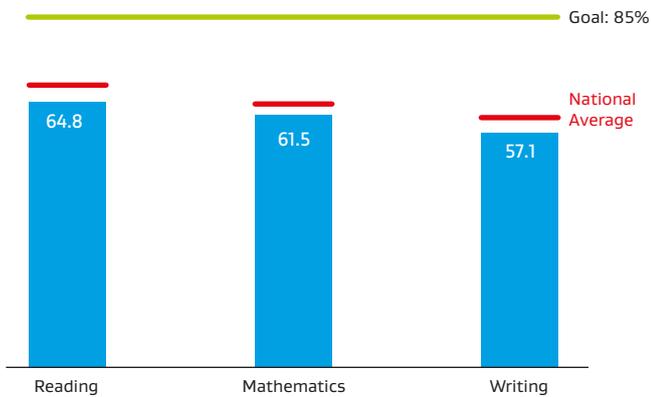
PERCENTAGE OF PRIMARY STUDENTS AT OR ABOVE NATIONAL STANDARDS, 2013



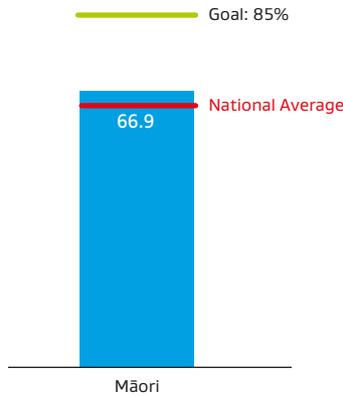
PERCENTAGE OF 18 YEAR OLDS WITH NCEA LEVEL 2 OR EQUIVALENT, 2013



PERCENTAGE OF MĀORI STUDENTS AT OR ABOVE NATIONAL STANDARDS, 2013

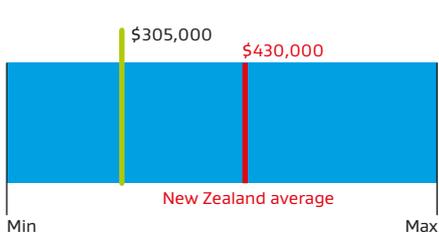


PERCENTAGE OF MĀORI 18 YEAR OLDS WITH NCEA LEVEL 2 OR EQUIVALENT, 2013

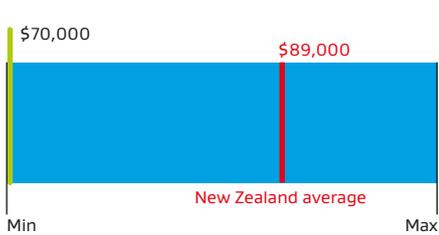


LIVING STANDARDS

AVERAGE HOUSE PRICE, NORTHLAND, 2014



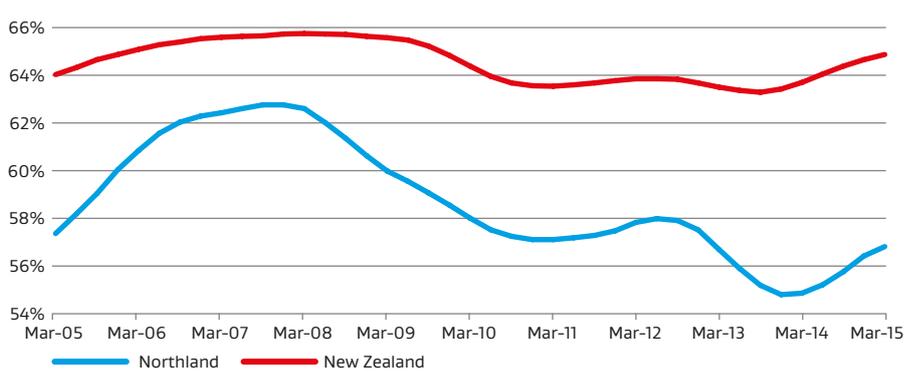
AVERAGE HOUSEHOLD INCOME, NORTHLAND, 2014



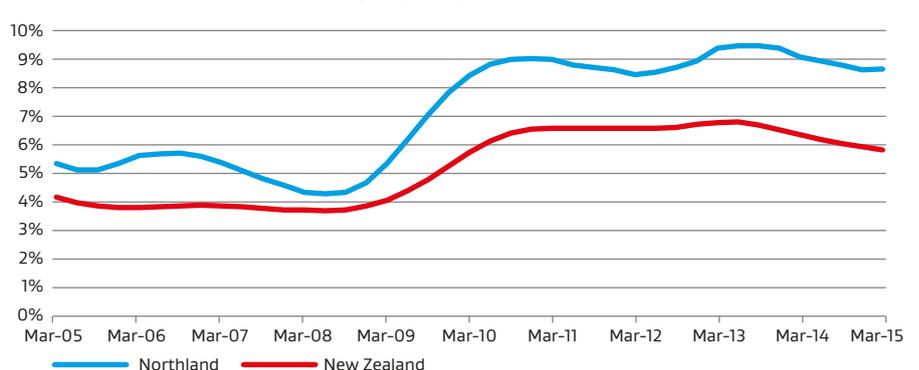
AVERAGE HOUSEHOLD WEEKLY RENT, NORTHLAND, 2014



ANNUAL AVERAGE EMPLOYMENT RATES, 2005–2015



ANNUAL AVERAGE UNEMPLOYMENT RATES, 2005–2015



These labour market patterns contribute to low mean annual household incomes when compared to the national mean (\$70,000 and \$89,000 respectively), and slower economic growth.

Educational attainment, although improving, is below national levels, and a relatively high proportion of young people are not in employment, education or training. There is potential in the region for significant employment growth, but a major challenge will be finding enough workers. The working age population is declining in Northland and many people continue to migrate out of the region to seek broader employment opportunities.

Outlook

In 2015, the Government, in association with regional stakeholders, published an independent study identifying short-to-medium term business growth opportunities in Northland. The study found Northland had significant untapped potential, but the region's labour supply was unlikely to meet forecast demand in key sectors due to the declining working-age population.

Growth opportunities are evident in key primary sectors: dairy, forestry, horticulture and aquaculture and processing related to these industries. Tourism is an opportunity if the region can link cultural and natural advantages across the region to reduce seasonality

and keep visitors in the region longer. It is an attractive industry for offshore investment, which could be used to increase numbers of high-value tourists.

Much of the potential for growth is dependent on the ability of Māori to better utilize their assets and capability. This will require managing land holdings at a scale, attracting investment capital for land development and improving skills and capabilities in land management.

PEOPLE	Northland	NZ	% of NZ
Population	166,000	4,509,700	3.7%
Share of population (%): 0–14 years	21.8	20.2	
15–24 years	11.8	14.2	
25–64 years	48.2	51.2	
65 years+	18.2	14.4	
Māori share of population (%)	29.6	14.1	
Net annual international migration	561	58,259	
Projected population growth 2013–2043, annual average	0.4	0.8	
Dependency ratio	2014	53	
	2043	68.3	

LIVING STANDARDS	Northland	NZ	% of NZ
Regional GDP (\$m)	5,760	229,718	2.5%
GDP per capita (\$)	34,825	51,319	
Mean household income	70,000	89,000	
Median house price	305,000	430,000	
Mean weekly rent	270	347	

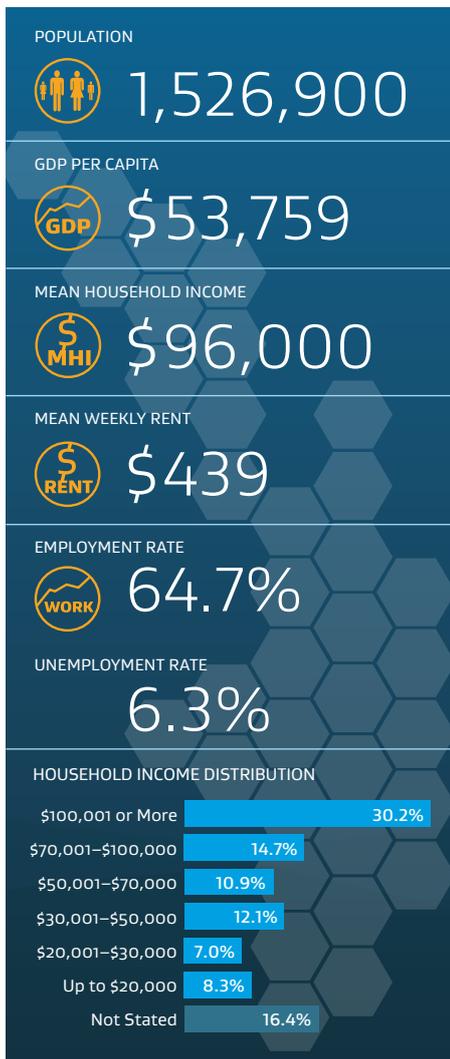
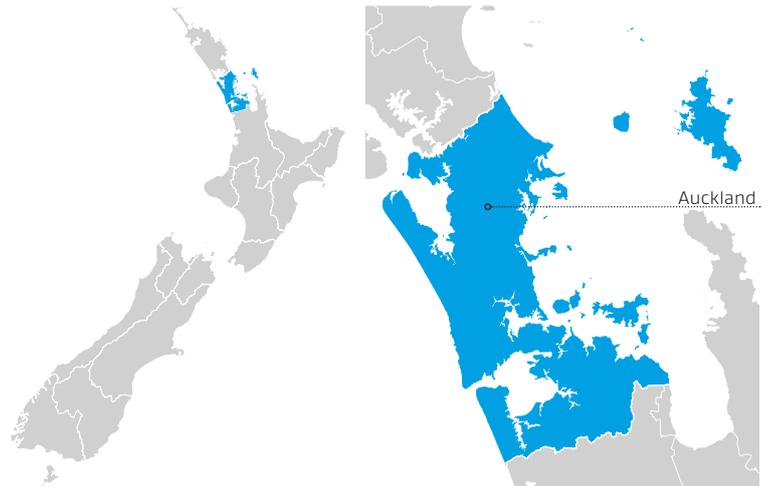
SKILLS & JOBS	Northland	NZ	% of NZ
Total employment	73,770	2,504,814	2.9%
Employment rate	57.1	65.2	
Unemployment rate	8.8	5.7	
Labour force participation rate	62.7	69.1	
% of 18 year olds obtaining minimum NCEA Level 2	76.7	78.6	
NEET rate	17.7	11.4	
% of 25–34 year olds with level 4 qualifications or higher	36.0	54.2	
Skilled and highly skilled jobs as a share of total employment	56.0	58.6	

Business Growth Agenda actions relevant to Northland

- Tai Tokerau Northland Regional Growth Programme
- Improved trade access for exporters with Korean FTA and Trans-Pacific Partnership
- Extend the Ultra-Fast Broadband network to smaller towns
- Lift rural broadband speeds with the Rural Broadband Initiative
- Extend the Northern Motorway - Puhoi to Wellsford to link Northland with Auckland
- Realignment of SH1 at Akerama & other regional roading upgrades
- Upgrade the one-way bridges on the Twin Coast Highways
- Education New Zealand Regional Partnership programme to grow international education
- Tourism Growth Partnership Fund to grow Tourism Infrastructure
- Complete Nga Haerenga – The New Zealand Cycle Trail
- Attract new Investment & jobs with the Regional Investment Attraction Programme
- Relaunch the Regional Business Partners Programme for Northland SMEs
- Build Regional Business Hubs
- Regional Research Institutes Programme
- Strengthen Callaghan Innovation's regional footprint
- Primary Growth Partnerships R & D Programme
- Encourage Water Storage Projects with the Irrigation Acceleration Fund & Crown Irrigation
- Unlock the productivity of Maori-owned land
- Resource Management Reforms to speed up decision-making
- Increase social housing provision through community providers
- Māori and Pasifika Trades Training
- Encourage vocation training with NZ Apprenticeships programme and trades academies
- Boost Regional skilled migration



Auckland is New Zealand’s largest city and home to about a third of the nation’s population. Auckland accounts for 35 per cent of the New Zealand economy and plays an important role nationally as a hub for the services sector, as a centre of innovation and knowledge, as the location for many multinational and national head offices, and a key gateway for international investment and connectivity.



Economy

Auckland is the headquarters for around two-thirds of New Zealand’s top 200 companies. Auckland’s industry mix has shifted over the past decade, with an increasing focus on knowledge-intensive services. Growth has been particularly strong in the information media and telecommunications industry, and in financial and insurance services.

Wholesale trade and manufacturing are also sectors of competitive advantage for Auckland and continue to be major employers in the region, even though the sectors are experiencing slower employment growth.

Auckland has a critical mass of public and private research organisations (including world-class tertiary institutions), with expertise in a range of basic and applied research – particularly in life sciences (bio technology). Consequently, Auckland has a much higher number of patent applications (per capita) than the rest of New Zealand, although it lags behind similar cities internationally.

Māori play a significant role in the Auckland economy. They are making significant investments in commercial, residential and retirement developments and, as more Treaty

settlements in the region are completed, this pace is expected to increase.

Auckland earns about 45 per cent of the nation’s revenue from screen production and post-production, and is the country’s dominant player in television production. It also is home to more than 60 per cent of the \$2.85 billion export education industry.

From 2009–14, Auckland’s economy expanded by 25 per cent (slightly above the national average of 22 per cent). The increase was driven by the finance and insurance industry, wholesale trade, and transport, postal and warehousing.

Natural Resources

Auckland is a predominately urban environment, although the region has a moderate-sized agricultural industry. The fertile volcanic soil and warm climate around Pukekohe supports horticulture, with a strong focus on onions and potatoes, as well as dairy farming. Auckland’s climate also provides the foundation for a varied wine industry and, coupled with its coastal amenities, for the tourism sector.

EMPLOYMENT BY INDUSTRY

EMPLOYMENT GROWTH AND CONCENTRATION COMPARED TO THE NATIONAL AVERAGE



NOTE: Location Quotient is the proportion of total employment in a given industry and region, divided by the proportion in that industry at a national level

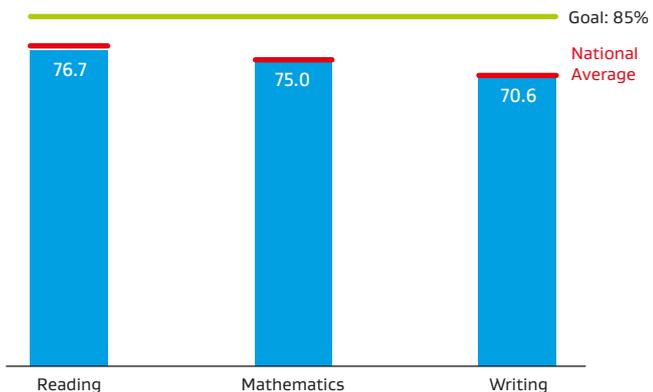
AREAS OF REGIONAL STRENGTH

INDUSTRY	SHARE OF TOTAL EMPLOYMENT			EMPLOYMENT GROWTH 2005-2015, ANNUAL AVERAGE	
	EMPLOYMENT COUNT	AUCKLAND	NZ	AUCKLAND	NZ
Information Media and Telecommunications	26,407	3.1%	2.0%	2.3%	0.8%
Wholesale Trade	54,963	6.5%	4.6%	-0.1%	-0.1%
Financial and Insurance Services	31,207	3.7%	2.6%	3.1%	2.1%
Other manufacturing	9,674	1.1%	0.9%	-4.9%	-4.7%
Administrative and Support Services	58,353	6.9%	5.6%	2.1%	2.4%

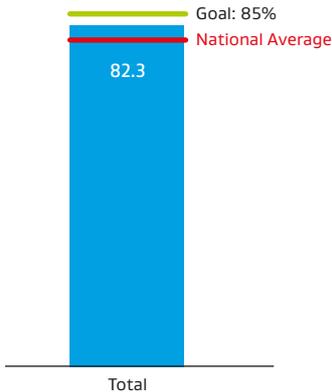
AUCKLAND

SKILLS PIPELINE

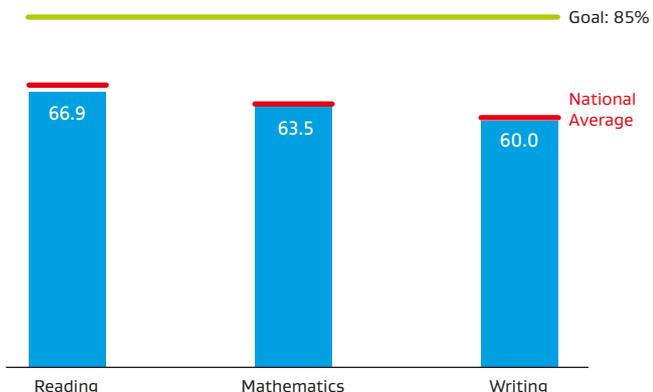
PERCENTAGE OF PRIMARY STUDENTS AT OR ABOVE NATIONAL STANDARDS, 2013



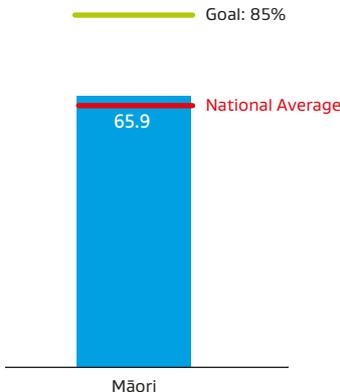
PERCENTAGE OF 18 YEAR OLDS WITH NCEA LEVEL 2 OR EQUIVALENT, 2013



PERCENTAGE OF MĀORI STUDENTS AT OR ABOVE NATIONAL STANDARDS, 2013

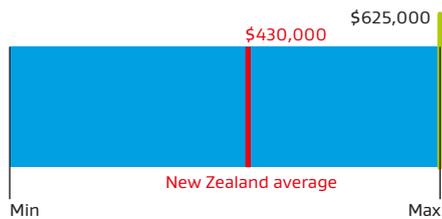


PERCENTAGE OF MĀORI 18 YEAR OLDS WITH NCEA LEVEL 2 OR EQUIVALENT, 2013



LIVING STANDARDS

AVERAGE HOUSE PRICE, AUCKLAND, 2014



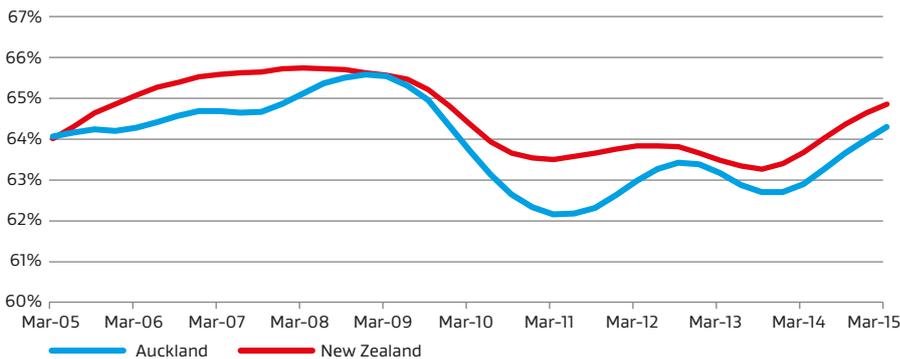
AVERAGE HOUSEHOLD INCOME, AUCKLAND, 2014



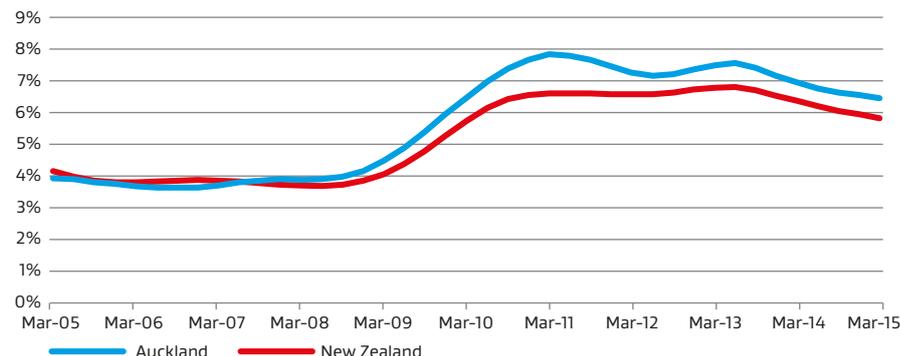
AVERAGE HOUSEHOLD WEEKLY RENT, AUCKLAND, 2014



ANNUAL AVERAGE EMPLOYMENT RATES, 2005–2015



ANNUAL AVERAGE UNEMPLOYMENT RATES, 2005–2015



Living Standards and Jobs

Auckland has the second-highest average household income in the country (\$96,000) just behind Wellington. However this is accompanied by the highest house prices and weekly rents.

Auckland's high level of household income is in line with high levels of education and a skilled workforce. However, there are significant disparities in outcomes within the region. This regional profile contains a detailed examination of South Auckland, whose outcomes tend to lag the rest of the city.

Outlook

There are opportunities for Auckland to lift its innovation performance

and continue to grow the knowledge-intensive sectors of its economy, focusing on high-value goods and services for a global market.

Educational disparities and barriers to workforce entry for younger people represent significant unrealised potential. In addition, the region could harness the benefits of its growing diversity and turn it into a driving force for enhanced international links. The city's large Asian population and proximate time zone with Asia offer a unique opportunity to benefit from the rapid growth and emerging global importance of Asia.

The Auckland economy continues to benefit from an increase in net immigration. However, strong increases in house prices pose a key risk to the

regional economy. To reduce this risk the Government has passed the Housing Accords and Special Housing Areas Act, focused on place-based urban regeneration and making use of public land and focussed on growth-enabling infrastructure development.

Auckland also needs to continue to attract high-quality investment to support Auckland's success as a centre of innovation, productivity and as an attractive place for people and business to locate. Auckland is New Zealand's gateway city to the world. A strong and thriving Auckland is needed for New Zealand to effectively compete with other countries across the Pacific Rim.

PEOPLE		Auckland	NZ	% of NZ
Population		1,526,900	4,509,700	33.9%
Share of population (%): 0–14 years		20.6	20.2	
15–24 years		15.2	14.2	
25–64 years		52.6	51.2	
65 years+		11.6	14.4	
Māori share of population (%)		10.1	14.1	
Net annual international migration		26,834	58,259	
Projected population growth 2013–2043, annual average		1.3	0.8	
Dependency ratio	2014	47.4	53	
	2043	56.1	68.3	
LIVING STANDARDS		Auckland	NZ	% of NZ
Regional GDP (\$m)		81,186	229,718	35.3%
GDP per capita (\$)		53,759	51,319	
Mean household income		96,000	89,000	
Median house price		625,000	430,000	
Mean weekly rent		439	347	
SKILLS & JOBS		Auckland	NZ	% of NZ
Total employment		846,950	2,504,814	33.8%
Employment rate		64.7	65.2	
Unemployment rate		6.3	5.7	
Labour force participation rate		69	69.1	
% of 18 year olds obtaining minimum NCEA Level 2		82.3	78.6	
NEET rate		10.4	11.4	
% of 25–34 year olds with level 4 qualifications or higher		60.1	54.2	
Skilled and highly skilled jobs as a share of total employment		60.7	58.6	

Business Growth Agenda actions relevant to Auckland

- Extend the Northern Motorway - Puhoi to Wellsford to link Northland with Auckland
- Complete the Waterview Connection and the Western Ring Route
- Complete upgrades to SH20a urban link, the Constellation Interchange & widening SH1 South
- Upgrade Auckland commuter railway
- Tourism Growth Partnership Fund to grow Tourism Infrastructure
- Complete Nga Haerenga – The New Zealand Cycle Trail
- Relaunch the Regional Business Partners Programme for Auckland SMEs
- Build Regional Business Hubs
- Unlock the productivity of Maori-owned land
- Resource Management Reforms to speed up decision-making
- Increase supply of affordable housing through Housing Accords and Special Housing Areas
- Increase social housing provision through community providers
- Māori and Pasifika Trades Training
- Encourage vocation training with NZ Apprenticeships programme and trades academies
- Build the New Zealand International Convention Centre
- Establish ICT graduate schools
- Improved trade access for exporters with Korean FTA and Trans-Pacific Partnership

AUCKLAND

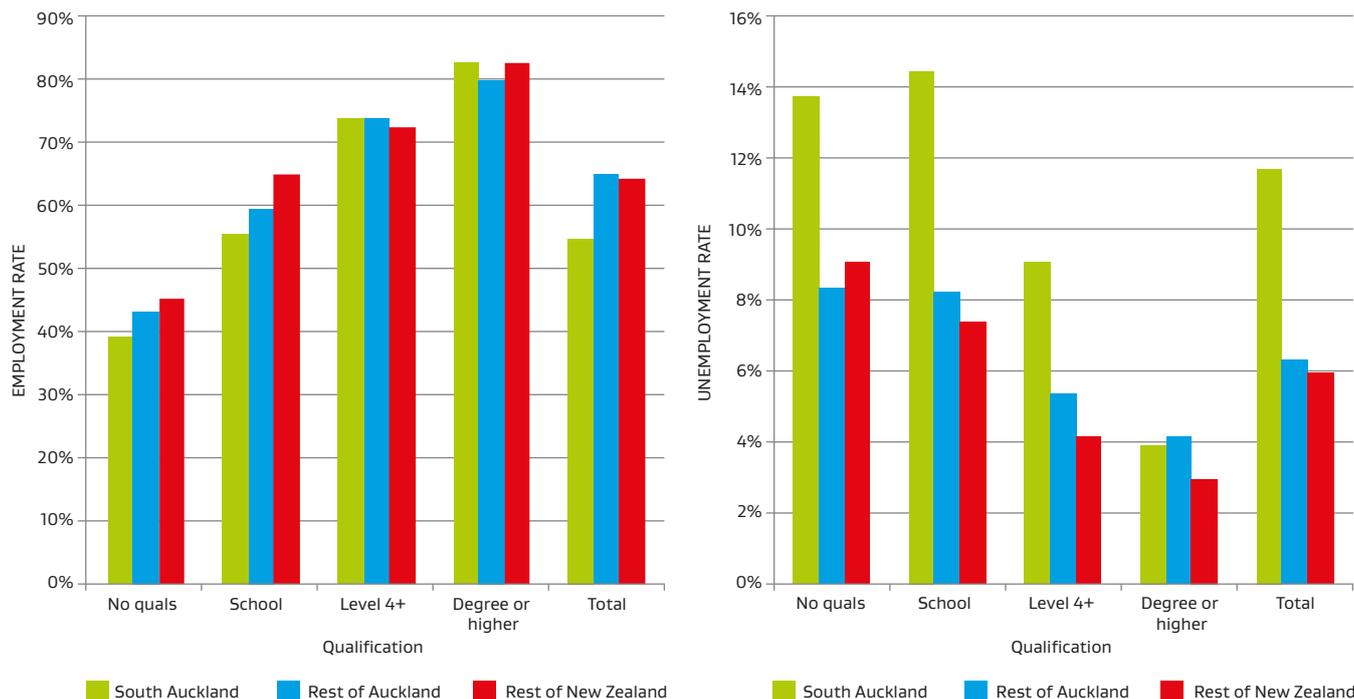
SOUTH AUCKLAND

South Auckland is highlighted in the REAR this year because of its points of difference and opportunity when contrasted with the rest of Auckland and New Zealand.

Some features of Auckland as a whole are exaggerated in South Auckland, including ethnic diversity, youth and a concentration of employment in sectors such as manufacturing and freight logistics. The future of this young, diverse population will help shape the future of Auckland. There are a higher proportion of lower qualified people

in South Auckland who tend to have poorer labour force outcomes when compared with the rest of Auckland and the New Zealand average. Working with South Auckland's communities to improve their socio-economic position is one of the keys to lifting Auckland's short and long-term economic performance.

FIGURE 6 – LABOUR FORCE OUTCOMES BY QUALIFICATIONS



Economy

The industries which dominate employment in South Auckland are postal and warehousing, healthcare and social assistance, retail trade, education and training, manufacturing and transport. South Auckland has 44 per cent of Auckland's total transport, postal and warehousing employees. A further 26 per cent of people work as machinery operators, drivers and labourers. Auckland Council analysis shows South Auckland has an above-average concentration of high-productivity employment in manufacturing, transport, wholesaling, and logistics.

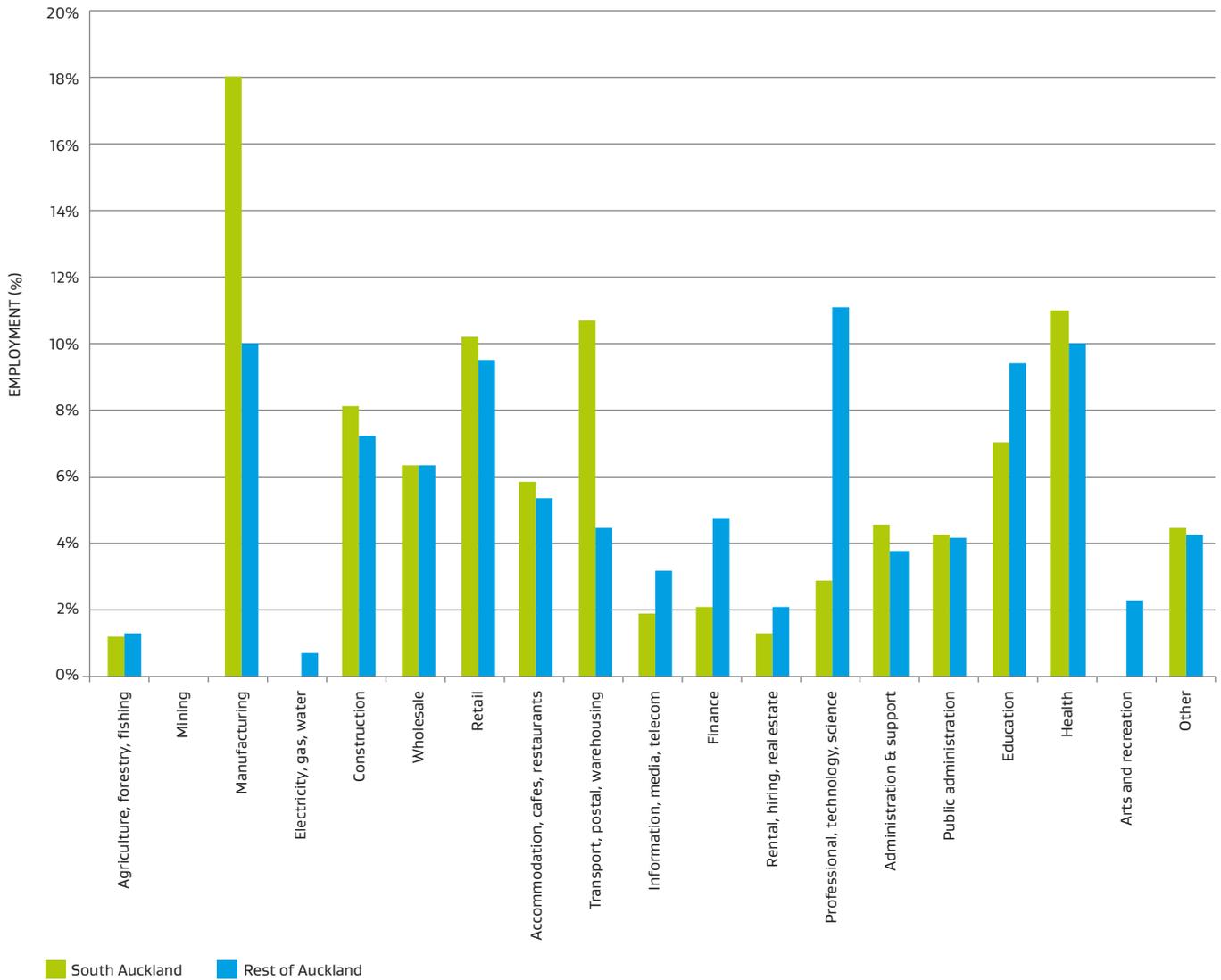
Employment is growing in productive, knowledge-intensive industries such as professional, scientific and technical services. As might be expected for an urban area, the numbers employed in industries based on natural resources, such as agriculture, forestry and fishing is very small.

South Auckland has important national infrastructure such as the Auckland International Airport and rail links to both Auckland and Tauranga ports, which connect its industries to other regions and internationally. As highlighted by the employment statistics, South Auckland has an important role in freight logistics due to this proximity. Auckland's industrial

land is concentrated in South Auckland and it also has most of Auckland's capacity for growth. For example, it has 32 per cent of the business-zoned land.

South Auckland is an integrated part of the wider Auckland labour market. About half of South Aucklanders commute to other parts of Auckland to work, and half of the workers in the region commute in. Non-locals have a disproportionate share of the skilled, well-paid work; they are almost twice as likely as locals to have NZQF Level 7 and above and they occupy two thirds of the higher paying jobs (over \$50,000 pa). Conversely, over half of all employment of locals is in lower skilled jobs (skill Levels 4 and 5).

FIGURE 7 – EMPLOYMENT BY INDUSTRY



Living Standards

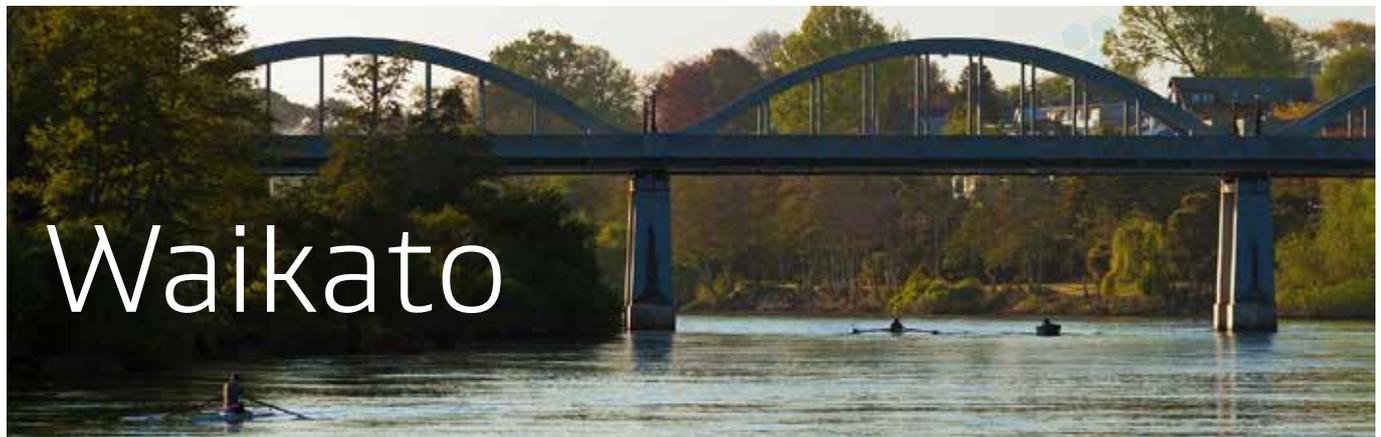
South Aucklanders are less likely than those in the rest of Auckland to hold any qualification (24 per cent versus 35 per cent with no qualification), and much less likely to hold a high qualification of NZQF Level 7 or above (14 per cent versus 30 per cent). This could be because there are local job opportunities for workers with lower levels of education attainment which do not exist in other parts of Auckland.

This picture is changing, however, with educational attainment growing faster than in the rest of the region, including increased numbers of school leavers attaining NCEA Level 2. This may in part be due to improvements in the education system and in part due to skilled workers choosing to move to South Auckland.

Outlook

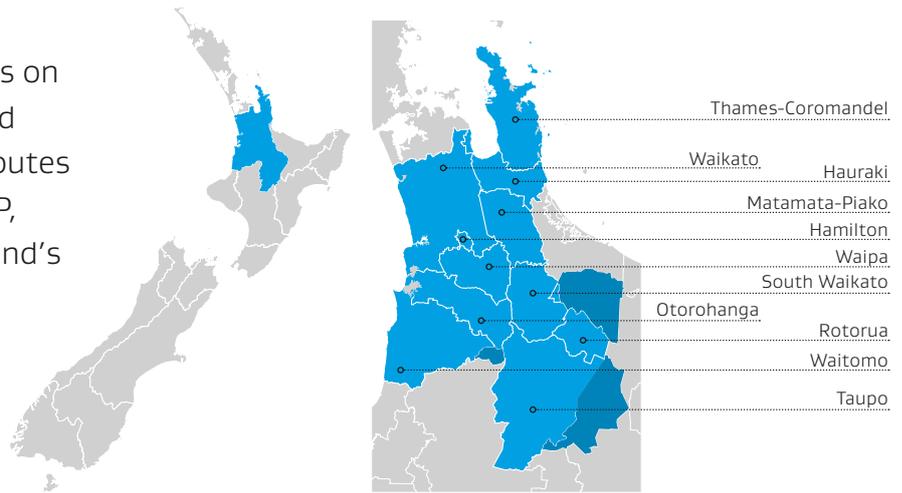
South Auckland’s opportunities include its youth, diversity and capacity for growth. Over a third of Auckland’s employment growth to 2040 is projected to be in South Auckland.

South Auckland is a key area for service delivery for both Auckland Council and Government, with a focus on improving the effectiveness of social and economic assistance and interventions. The Government is working on a number of complementary initiatives. These include Better Public Service targets to make Government easier for the community and industry to engage with, working with local employers on pathways to employment including programmes such as Māori and Pasifika Trades Training, and support for housing development and redevelopment.



Waikato

The Waikato region is a medium-sized economy with a strong focus on primary production and associated manufacturing. The region contributes 9.0 per cent of New Zealand's GDP, and has 9.6 per cent of New Zealand's population.



Economy

There is considerable economic diversity among the 11 territorial authorities within Waikato. Hamilton is the centre of innovation activity in the region. The city has strengths in utilities and chemicals, minerals and metals manufacturing; in addition, it is a support hub for dairy production. High-tech industries, such as agritech and ICT, are of increasing importance to the city.

Dairy plays a prominent role in most districts. Although dairy farming accounts for only 1.7 per cent of employment in New Zealand, it makes up 15.5 per cent in Otorohanga, 13.6 per cent in Matamata-Piako, 11.9 per cent in South Waikato, and 9.4 per cent in Hauraki. The hillier Waitomo District has greater employment in sheep farming than dairy. Forestry plays an important role in the economies of Taupō, Thames-Coromandel and South Waikato.

Waikato District also has mineral assets (coal and ironsand), as well as the tourist centre of Raglan. Hauraki has strengths in mining (Waihi) and horticulture, and South Waikato has

the Kinleith pulp and paper mill in Tokoroa.

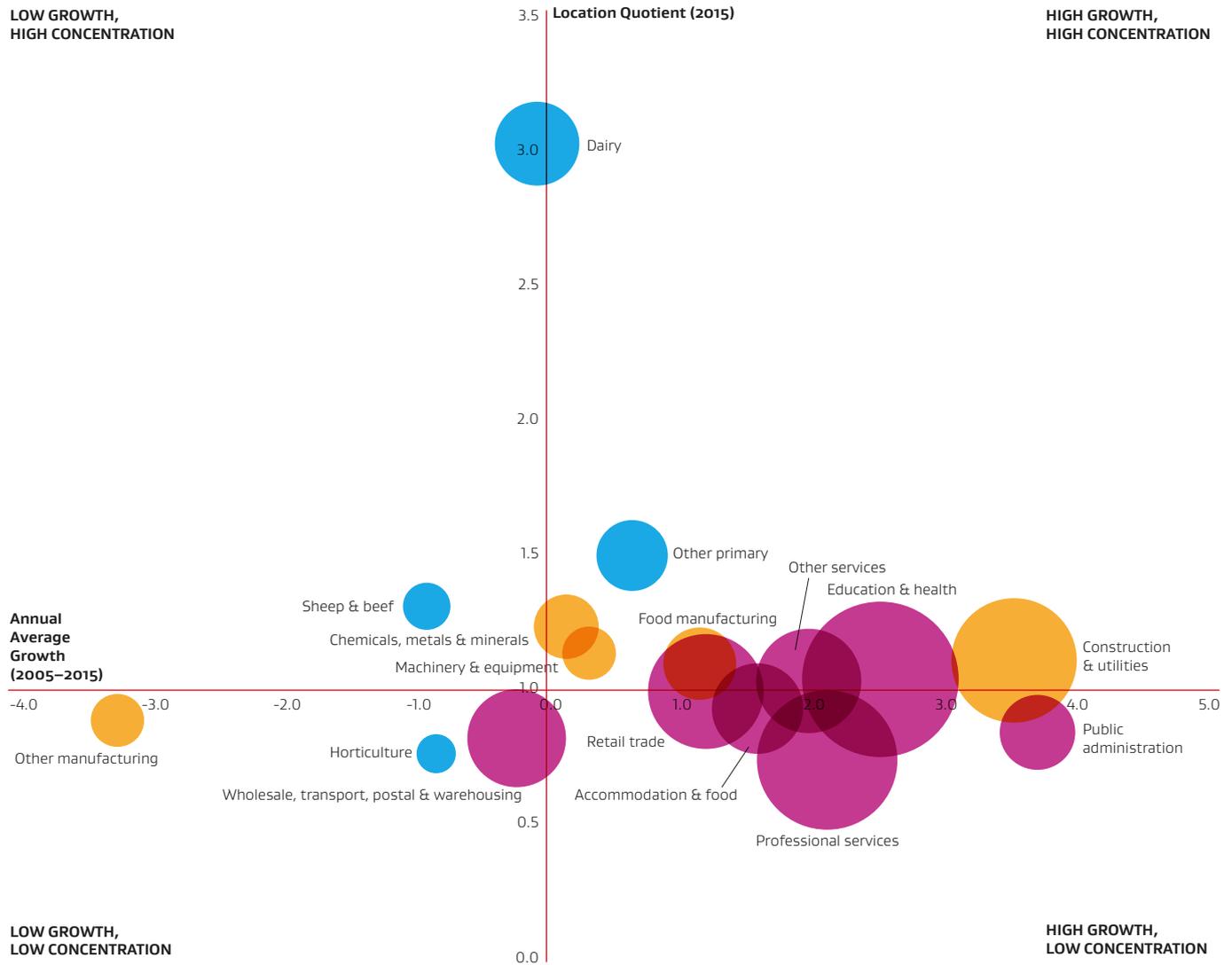
The Māori asset base in the Waikato has been estimated to be worth around \$6.2 billion in 2014, representing 15 per cent of total Māori assets in New Zealand. Agriculture, forestry and fishing (28 per cent); property and business services (23 per cent); and manufacturing (15 per cent) make significant contributions to the overall Māori asset base in the region. It has been estimated that Māori businesses generate \$1.4 billion annually for the regional economy.

Natural Resources

Waikato is New Zealand's fourth-largest region by area, covering 2.5 million hectares. Waikato is home to some of New Zealand's most iconic and culturally important natural assets, such as Lake Taupō and the Waikato River. The region's natural resources provide the basis for strong primary production performance, security of energy supply for large-scale processing and manufacturing activity, and petroleum and minerals potential. Geothermal energy plays a major economic role for the region, particularly in Taupō District.

EMPLOYMENT BY INDUSTRY

EMPLOYMENT GROWTH AND CONCENTRATION COMPARED TO THE NATIONAL AVERAGE



NOTE: Location Quotient is the proportion of total employment in a given industry and region, divided by the proportion in that industry at a national level

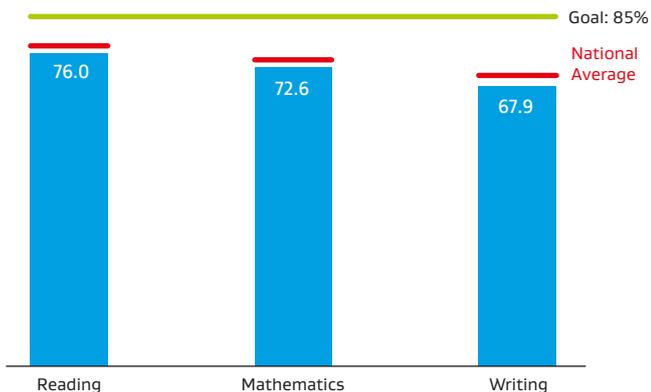
AREAS OF REGIONAL STRENGTH

INDUSTRY	SHARE OF TOTAL EMPLOYMENT			EMPLOYMENT GROWTH 2005-2015, ANNUAL AVERAGE	
	EMPLOYMENT COUNT	WAIKATO	NZ	WAIKATO	NZ
Dairy Cattle Farming	11,797	5.1%	1.7%	-0.1%	1.0%
Mining	1,155	0.5%	0.3%	2.7%	3.8%
Forestry and Logging	946	0.4%	0.2%	-2.2%	0.3%
Electricity, Gas, Water and Waste Services	2,966	1.3%	0.8%	8.6%	6.3%
Other agriculture	6,015	2.6%	1.8%	0.9%	1.4%

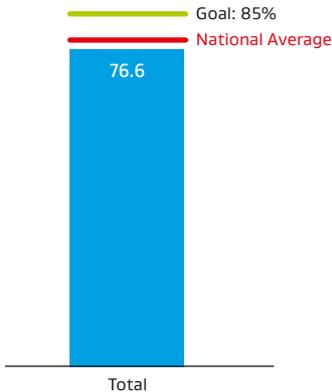
WAIKATO

SKILLS PIPELINE

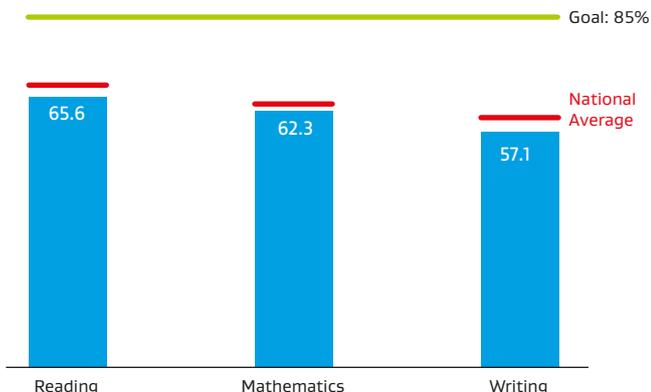
PERCENTAGE OF PRIMARY STUDENTS AT OR ABOVE NATIONAL STANDARDS, 2013



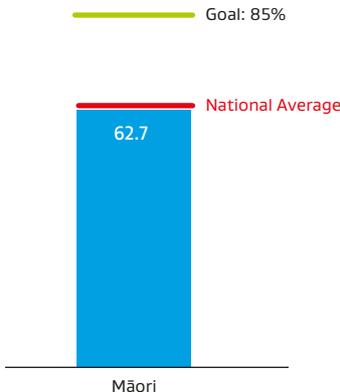
PERCENTAGE OF 18 YEAR OLDS WITH NCEA LEVEL 2 OR EQUIVALENT, 2013



PERCENTAGE OF MĀORI STUDENTS AT OR ABOVE NATIONAL STANDARDS, 2013

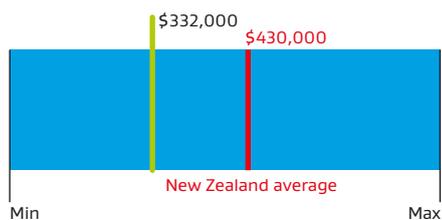


PERCENTAGE OF MĀORI 18 YEAR OLDS WITH NCEA LEVEL 2 OR EQUIVALENT, 2013



LIVING STANDARDS

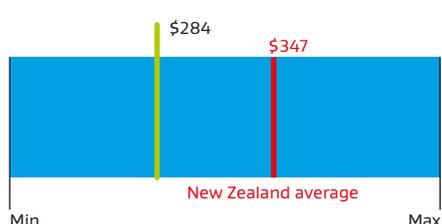
AVERAGE HOUSE PRICE, WAIKATO, 2014



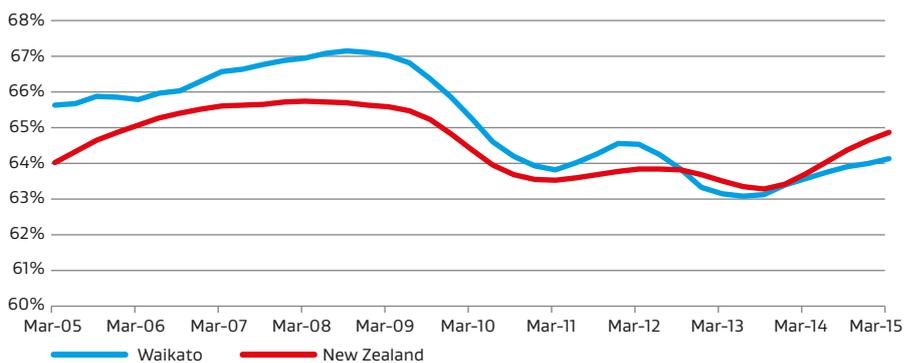
AVERAGE HOUSEHOLD INCOME, WAIKATO, 2014



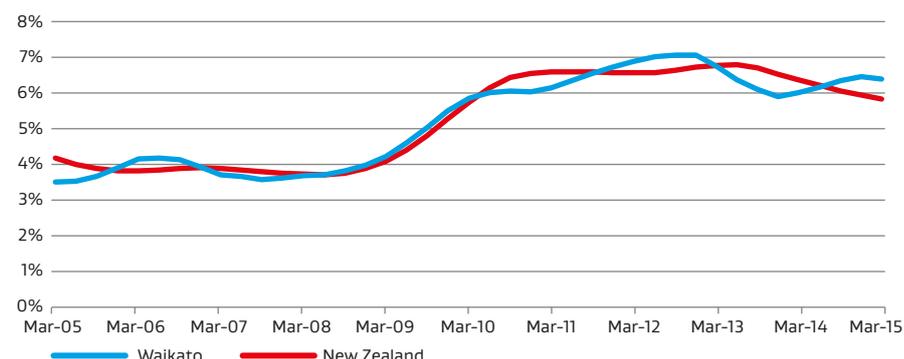
AVERAGE HOUSEHOLD WEEKLY RENT, WAIKATO, 2014



ANNUAL AVERAGE EMPLOYMENT RATES, 2005–2015



ANNUAL AVERAGE UNEMPLOYMENT RATES, 2005–2015



The Waikato region has three operating coal mines and two ironsand mines in the north of the region and a long history of gold mining.

Living Standards and Jobs

Waikato's mean household income of \$76,400 is slightly below the national average. Incomes within the region range from a low of \$58,200 in Thames-Coromandel District to a high of \$86,300 in Waikato District.

Employment, unemployment and labour force participation rates are close to the national average; however, Waikato has a higher proportion of youth not in employment, education or training (NEET). The region also has a slightly below average proportion of 18 year olds

with NCEA Level 2 qualifications, and a comparatively low proportion of 25–34 year olds with Level 4 qualifications or higher.

Outlook

Most of Waikato's productive land is well-developed. This will limit further expansion in the agriculture sector. The region will therefore have to leverage its untapped human and business potential to generate greater growth. Councils, iwi, and the business and education sectors have released a joint annual implementation plan focusing on seven actions. These are: developing the Ruakura freight hub, creating a new Waikato Plan to shape the region, completing the Waikato Expressway,

undertaking a study of constraints on growth in key industries and future investment opportunities, reducing local government red tape for business, a regional strategy to improve the supply of and demand for skilled labour, and, creating 'The Waikato Story' (and supporting material) that describes the tourism, education and investment propositions for the Waikato region.

A spatial plan to provide an efficient and effective mechanism for regional collaboration on priority issues and responses is under development. The plan is being developed in the context of the Government's Business Growth Agenda objectives, especially building a more productive, competitive economy and providing better public services.

PEOPLE		Waikato	NZ	% of NZ
Population		430,800	4,509,700	9.6%
Share of population (%): 0–14 years		21.5	20.2	
15–24 years		14.2	14.2	
25–64 years		49.4	51.2	
65 years+		14.9	14.4	
Māori share of population (%)		20.7	14.1	
Net annual international migration		2,303	58,259	
Projected population growth 2013–2043, annual average		0.7	0.8	
Dependency ratio	2014	57.4	53	
	2043	75.3	68.3	

LIVING STANDARDS		Waikato	NZ	% of NZ
Regional GDP (\$m)		20,576	229,718	9.0%
GDP per capita (\$)		48,098	51,319	
Mean household income		76,400	89,000	
Median house price		332,000	430,000	
Mean weekly rent		284	347	

SKILLS & JOBS		Waikato	NZ	% of NZ
Total employment		231,749	2,504,814	9.3%
Employment rate		64.4	65.2	
Unemployment rate		6.2	5.7	
Labour force participation rate		68.6	69.1	
% of 18 year olds obtaining minimum NCEA Level 2		76.6	78.6	
NEET rate		14.1	11.4	
% of 25–34 year olds with level 4 qualifications or higher		47.1	54.2	
Skilled and highly skilled jobs as a share of total employment		56.8	58.6	



Business Growth Agenda actions relevant to Waikato

Improved trade access for exporters with Korean FTA and Trans-Pacific Partnership

Extend the Ultra-Fast Broadband network to smaller towns

Lift rural broadband speeds with the Rural Broadband Initiative

Complete the Waikato Expressway

Complete Hamilton City ring road & other regional roading projects

Education New Zealand Regional Partnership programme to grow international education

Tourism Growth Partnership Fund to grow Tourism Infrastructure

Complete Nga Haerenga – The New Zealand Cycle Trail

Attract new Investment & jobs with the Regional Investment Attraction Programme

Relaunch the Regional Business Partners Programme for Waikato SMEs

Build Regional Business Hubs

Regional Research Institutes Programme

Strengthen Callaghan Innovation's regional footprint

Primary Growth Partnerships R & D Programme

Unlock the productivity of Maori-owned land

Resource Management Reforms to speed up decision-making

Increase social housing provision through community providers

Māori and Pasifika Trades Training

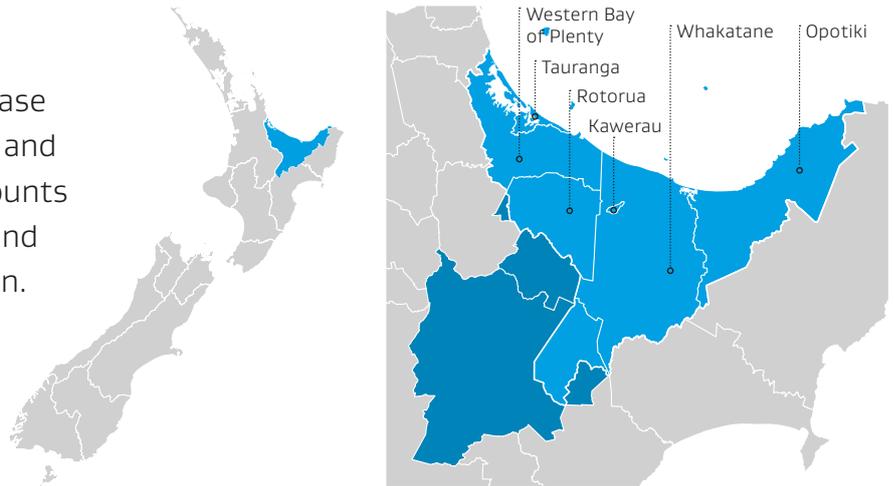
Encourage vocation training with NZ Apprenticeships programme and trades academies

Boost Regional skilled migration



Bay of Plenty

Bay of Plenty is a medium-sized economy with a strong primary base and an expanding manufacturing and services industry. The region accounts for 5.2 per cent of national GDP, and 6.3 per cent of national population.



Economy

The Bay of Plenty has regional specialisations in horticulture and forestry and logging. Specialised manufacturing is of growing importance in the region, particularly chemical, mineral and metal manufacturing. Tourism is a major source of income, particularly in Rotorua, which is part of the “Golden Triangle” of tourism in New Zealand, along with Auckland and Queenstown.

Western Bay of Plenty District is the main centre of New Zealand’s kiwifruit industry, and horticulture accounts for 4.9 per cent of employment in the district (compared with 1.4 per cent for New Zealand as a whole). Employment in this industry has been declining, and an outbreak of a bacterial kiwifruit vine disease (PSA-V) had a negative impact on production from late 2010.

The eastern districts of Bay of Plenty have a strong reliance on forestry and dairy. A total of 6.5 per cent of Whakatāne District’s employment is in forestry or related manufacturing (compared with 1.6 per cent for the country as a whole). Those two industries also make up 4.8 per cent of Rotorua District’s employment and 3.5 per cent in Opotiki District. A total of 10.7 per cent of Kawerau District’s

employment is in wood, paper or pulp manufacturing, although this industry has been in decline in the district. Horticulture and agricultural support services have seen strong employment growth in the eastern Bay of Plenty.

Tauranga City has seen strong growth in administrative and support services over the past decade, partially driven by higher than average population growth. Population growth also explains the employment growth in education and healthcare industries.

Natural Resources

The Bay of Plenty region is endowed with a warm climate and large areas of land suitable for high-yield primary production. The region also has significant geothermal resources and aquaculture potential.

Access to natural resources, particularly water, is a crucial element for how fast the Bay of Plenty can grow. Demands for, and impacts on, the quality of water will increase as land use continues to change to more intensive production, and additional land is developed.

EMPLOYMENT BY INDUSTRY

EMPLOYMENT GROWTH AND CONCENTRATION COMPARED TO THE NATIONAL AVERAGE



NOTE: Location Quotient is the proportion of total employment in a given industry and region, divided by the proportion in that industry at a national level

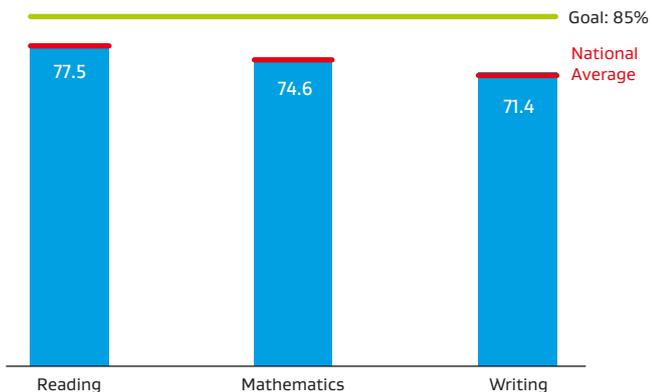
AREAS OF REGIONAL STRENGTH

INDUSTRY	SHARE OF TOTAL EMPLOYMENT			EMPLOYMENT GROWTH 2005-2015, ANNUAL AVERAGE	
	EMPLOYMENT COUNT	BAY OF PLENTY	NZ	BAY OF PLENTY	NZ
Other agriculture	6,188	4.1%	1.8%	2.8%	1.4%
Forestry and Logging	832	0.5%	0.2%	-0.6%	0.3%
Wood manufacturing	3,726	2.5%	1.4%	-3.1%	-2.3%
Horticulture	3,358	2.2%	1.4%	-1.5%	-0.1%
Administrative and Support Services	10,958	7.2%	5.6%	5.9%	2.4%

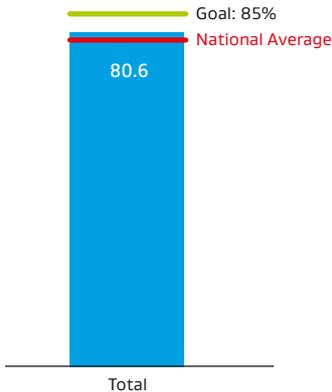
BAY OF PLENTY

SKILLS PIPELINE

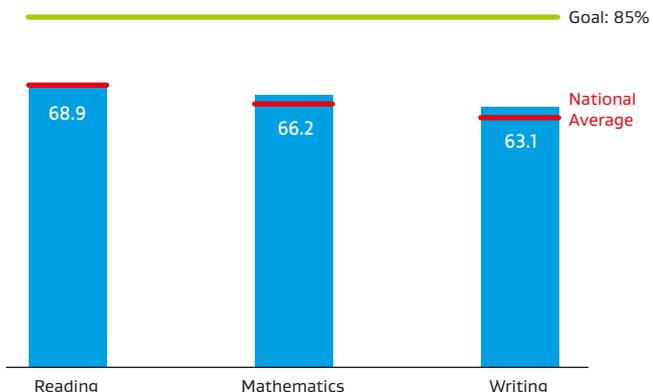
PERCENTAGE OF PRIMARY STUDENTS AT OR ABOVE NATIONAL STANDARDS, 2013



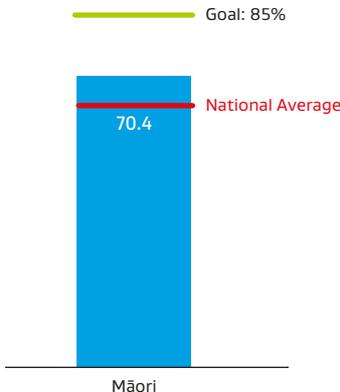
PERCENTAGE OF 18 YEAR OLDS WITH NCEA LEVEL 2 OR EQUIVALENT, 2013



PERCENTAGE OF MĀORI STUDENTS AT OR ABOVE NATIONAL STANDARDS, 2013

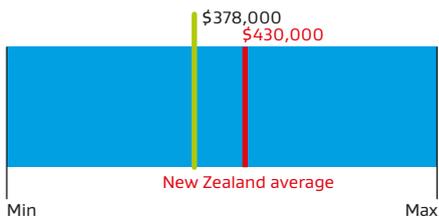


PERCENTAGE OF MĀORI 18 YEAR OLDS WITH NCEA LEVEL 2 OR EQUIVALENT, 2013



LIVING STANDARDS

AVERAGE HOUSE PRICE, BAY OF PLENTY, 2014



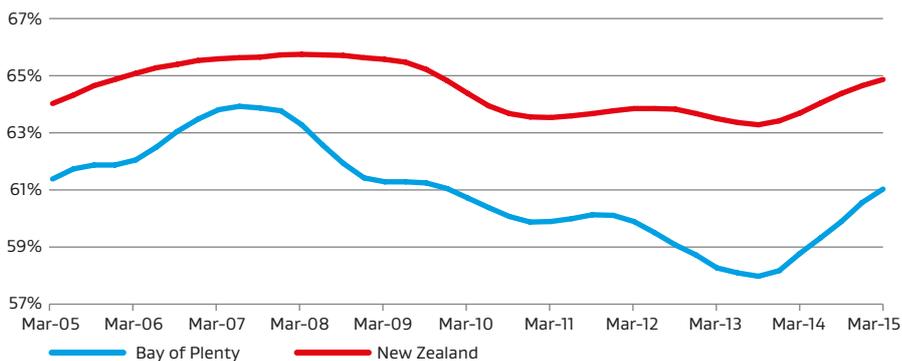
AVERAGE HOUSEHOLD INCOME, BAY OF PLENTY, 2014



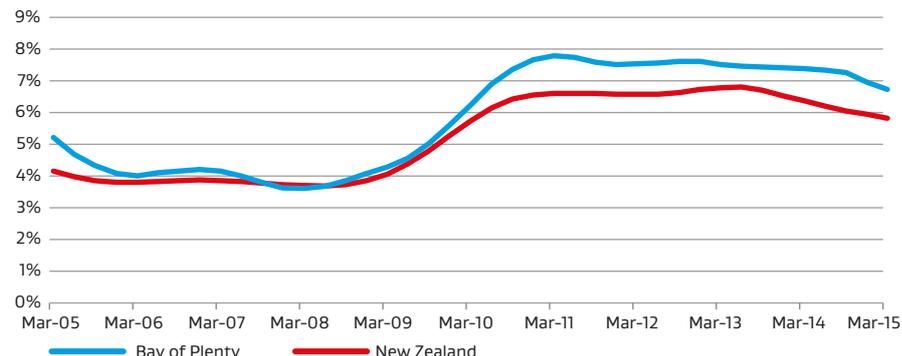
AVERAGE HOUSEHOLD WEEKLY RENT, BAY OF PLENTY, 2014



ANNUAL AVERAGE EMPLOYMENT RATES, 2005–2015



ANNUAL AVERAGE UNEMPLOYMENT RATES, 2005–2015



Living Standards and Jobs

The region performs above the national average in key secondary school qualifications, but has a less-skilled workforce than New Zealand's other regions, reflecting current labour market demands.

Over the last decade, the region's economy has not performed as well as the national economy in terms of unemployment, labour participation and NEET rates. The performance gap in these measures widened after 2009. The PSA-V disease had a negative impact on the Bay of Plenty, from which the region has recently recovered.

At \$77,600, mean annual household income is below the national average, although this partially reflects the higher than average proportion of retirees, who are generally on lower incomes. There is a divergence in incomes between eastern and western Bay of Plenty, with mean annual household income ranging from a high of \$79,600 in Western Bay of Plenty District to a low of \$59,400 in Kawerau District.

Outlook

In 2015, the Government published an independent study identifying a number of growth opportunities in the Bay of

Plenty. Key sectors include forestry and wood processing, horticulture (kiwifruit, avocado, and Manuka honey), aquaculture, agriculture, and processing related to these industries. Better use of the region's abundant geothermal and water resources would enhance these opportunities, as would greater development of Māori land.

Growth in the Bay of Plenty economy will require higher levels of formal qualifications and skills in the population. There are opportunities to enable youth to continue with their education and find employment in the region, particularly among the region's large, youthful, Māori population.

PEOPLE	Bay of Plenty	NZ	% of NZ
Population	282,300	4,509,700	6.3%
Share of population (%): 0–14 years	21.3	20.2	
15–24 years	12.3	14.2	
25–64 years	48.6	51.2	
65 years+	17.8	14.4	
Māori share of population (%)	25.7	14.1	
Net annual international migration	1,599	58,259	
Projected population growth 2013–2043, annual average	0.5	0.8	
Dependency ratio			
2014	64.2	53	
2043	86.0	68.3	

LIVING STANDARDS	Bay of Plenty	NZ	% of NZ
Regional GDP (\$m)	11,862	229,718	5.2%
GDP per capita (\$)	42,213	51,319	
Mean household income	77,600	89,000	
Median house price	378,000	430,000	
Mean weekly rent	290	347	

SKILLS & JOBS	Bay of Plenty	NZ	% of NZ
Total employment	151,299	2,504,814	6.0%
Employment rate	61.9	65.2	
Unemployment rate	6.4	5.7	
Labour force participation rate	66.1	69.1	
% of 18 year olds obtaining minimum NCEA Level 2	80.6	78.6	
NEET rate	14.5	11.4	
% of 25–34 year olds with level 4 qualifications or higher	48.3	54.2	
Skilled and highly skilled jobs as a share of total employment	56.5	58.6	



Business Growth Agenda actions relevant to Bay of Plenty

Toi Moana Bay of Plenty Regional Growth Programme

Improved trade access for exporters with Korean FTA and Trans-Pacific Partnership

Extend the Ultra-Fast Broadband network to smaller towns

Lift rural broadband speeds with the Rural Broadband Initiative

The Tauranga Eastern Link

Upgrade the Hairini Link & other regional roading projects

Education New Zealand Regional Partnership programme to grow international education

Tourism Growth Partnership Fund to grow Tourism Infrastructure

Complete Nga Haerenga – The New Zealand Cycle Trail

Attract new Investment & jobs with the Regional Investment Attraction Programme

Relaunch the Regional Business Partners Programme for Bay of Plenty SMEs

Build Regional Business Hubs

Regional Research Institutes Programme

Strengthen Callaghan Innovation's regional footprint

Primary Growth Partnerships R & D Programme

Encourage Water Storage Projects with the Irrigation Acceleration Fund & Crown Irrigation

Unlock the productivity of Māori-owned land

Resource Management Reforms to speed up decision-making

Increase supply of affordable housing through Housing Accords and Special Housing Areas

Increase social housing provision through community providers

Māori and Pasifika Trades Training

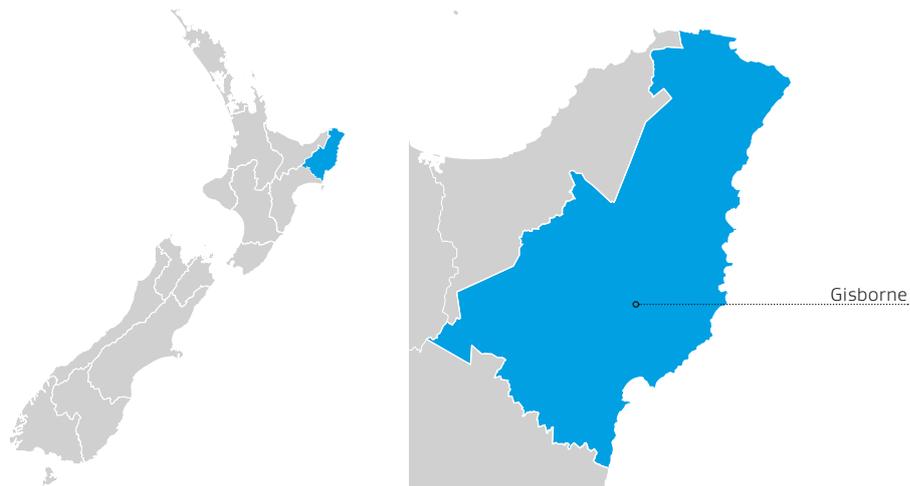
Encourage vocation training with NZ Apprenticeships programme and trades academies

Boost Regional skilled migration



Gisborne

Gisborne is a small economy underpinned by an export-focused agriculture sector. The region accounts for 0.7 per cent of national GDP, and 1.0 per cent of total population.



Economy

Gisborne has a strong advantage in the primary sector, especially forestry and logging, sheep farming, and agricultural support services industries.

Of all New Zealand’s regions, Gisborne is the most reliant on forestry and logging. A total of 1.7 per cent of employment is in this industry, compared with 0.2 per cent for the rest of the country. Wood manufacturing is also important to the region, accounting for 1.9 per cent of employment (compared with 1.4 per cent for the rest of the country). Although forestry employment has been growing in the region, employment in wood manufacturing has been declining.

Sheep, beef cattle and grain farming accounts for 5.9 per cent of employment in the region, compared with 1.2 per cent for the rest of New Zealand. Like most parts of New Zealand, employment in sheep farming has been declining in Gisborne. Horticulture, particularly fruit growing, is a relatively important part of the region’s economy, although employment has been falling there as well.

Gisborne’s GDP per capita is the lowest of all New Zealand’s regions. Between

2009 and 2014, GDP increased by 15.7 per cent (well below the national movement of 22.4 per cent). This increase was driven by the forestry and logging industry, as well as strong growth in electricity, gas, water and waste services.

Natural Resources

The Gisborne region has a generally dry and temperate climate, punctuated by reasonably frequent periods of drought and high rainfall. Extreme wet weather events such as cyclones generate risks to the productive base of the economy; and the region’s reliance on freshwater for primary production have the potential to make it vulnerable to drought.

The Poverty Bay flats have some of the most productive soils in the region and are a centre for horticulture. Large tracts of land in the region, particularly along the East Coast, are steep with young soils making them susceptible to erosion and creating opportunities for the forestry sector.

Untapped oil and petroleum reserves located in the East Coast Basin creates possibilities for the development of an extraction industry in the region.

EMPLOYMENT BY INDUSTRY

EMPLOYMENT GROWTH AND CONCENTRATION COMPARED TO THE NATIONAL AVERAGE



NOTE: Location Quotient is the proportion of total employment in a given industry and region, divided by the proportion in that industry at a national level

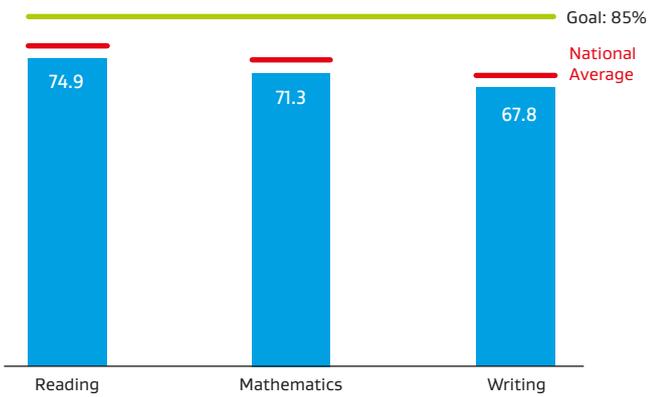
AREAS OF REGIONAL STRENGTH

INDUSTRY	SHARE OF TOTAL EMPLOYMENT			EMPLOYMENT GROWTH 2005–2015, ANNUAL AVERAGE	
	EMPLOYMENT COUNT	GISBORNE	NZ	GISBORNE	NZ
Forestry and Logging	401	1.7%	0.2%	7.8%	0.3%
Grain, Sheep and Beef Cattle Farming	1,438	5.9%	1.2%	-1.3%	-2.1%
Other agriculture	1,577	6.5%	1.8%	0.8%	1.4%
Horticulture	1,109	4.6%	1.4%	-2.5%	-0.1%
Fishing	94	0.4%	0.2%	-2.0%	-0.7%

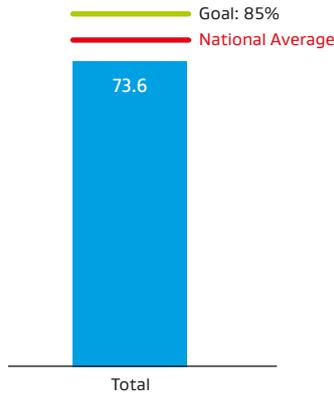
GISBORNE

SKILLS PIPELINE

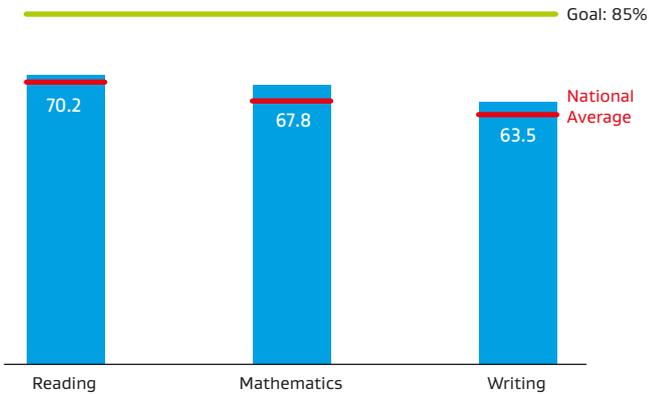
PERCENTAGE OF PRIMARY STUDENTS AT OR ABOVE NATIONAL STANDARDS, 2013



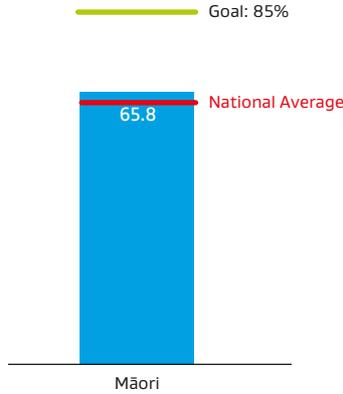
PERCENTAGE OF 18 YEAR OLDS WITH NCEA LEVEL 2 OR EQUIVALENT, 2013



PERCENTAGE OF MĀORI STUDENTS AT OR ABOVE NATIONAL STANDARDS, 2013



PERCENTAGE OF MĀORI 18 YEAR OLDS WITH NCEA LEVEL 2 OR EQUIVALENT, 2013



LIVING STANDARDS

AVERAGE HOUSE PRICE, GISBORNE, 2014



AVERAGE HOUSEHOLD INCOME, GISBORNE, 2014



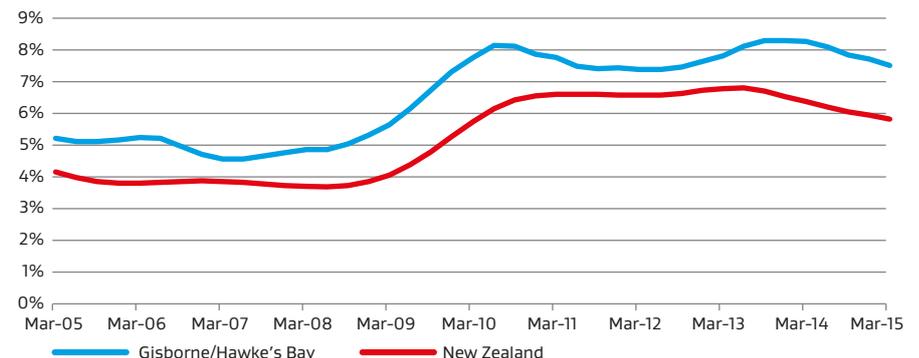
AVERAGE HOUSEHOLD WEEKLY RENT, GISBORNE, 2014



ANNUAL AVERAGE EMPLOYMENT RATES, 2005–2015



ANNUAL AVERAGE UNEMPLOYMENT RATES, 2005–2015



Living Standards and Jobs

On most measures of living standards, Gisborne is underperforming relative to the rest of New Zealand. Mean and median household incomes are among the lowest in the country, and the region's labour force is relatively unskilled.

Mean household income in Gisborne is the lowest in the country at \$69,900, compared to a national figure of \$89,000. Lower incomes are accompanied by below average house prices and weekly rent.

Gisborne's unique demographic composition may partially explain this performance. The population is the youngest in the country: 25 per cent of

the population is under 14, compared to 20 per cent for New Zealand as a whole.

Although outcomes are improving for youth in the region, NEET rates remain above average, and the proportion of 18-year olds with at least NCEA Level 2 is the second-lowest in the country.

Outlook

Gisborne's natural resources and its comparatively young and Māori population base present opportunities to boost the region's economic prospects. In addition improving educational attainment rates and skill and employment opportunities would flow on to better economic and social outcomes.

In 2014, the Government, working with local government partners, released a study of the economic potential of the East Coast, including both Gisborne and Hawke's Bay. The study identified the potential for growth in areas where the East Coast already had comparative advantage, such as forestry, livestock farming and horticulture. If Gisborne's unique natural and cultural amenities can be built upon, then the visitor economy can play a greater role in helping the region grow. There are major developments planned around this sector, and the 250 year anniversary of Captain Cook's first landing in New Zealand in 2019 will provide a national and international spotlight on the region.

PEOPLE	Gisborne	NZ	% of NZ
Population	47,100	4,509,700	1.0%
Share of population (%): 0–14 years	24.7	20.2	
15–24 years	13.4	14.2	
25–64 years	48.0	51.2	
65 years+	13.9	14.4	
Māori share of population (%)	45.1	14.1	
Net annual international migration	51	58,259	
Projected population growth 2013–2043, annual average	0.0	0.8	
Dependency ratio	2014	63	53
	2043	80.9	68.3

LIVING STANDARDS	Gisborne	NZ	% of NZ
Regional GDP (\$m)	1,626	229,718	0.7%
GDP per capita (\$)	34,602	51,319	
Mean household income	69,900	89,000	
Median house price	240,000	430,000	
Mean weekly rent	256	347	

SKILLS & JOBS	Gisborne	NZ	% of NZ
Total employment	24,227	2,504,814	1.0%
Employment rate	56.6	65.2	
Unemployment rate	9.4	5.7	
Labour force participation rate	62.5	69.1	
% of 18 year olds obtaining minimum NCEA Level 2	73.6	78.6	
NEET rate	18.1*	11.4	
% of 25–34 year olds with level 4 qualifications or higher	35.7	54.2	
Skilled and highly skilled jobs as a share of total employment	53.1	58.6	

*Combined figure for Gisborne/Hawke's Bay.



Business Growth Agenda actions relevant to Gisborne

East Coast Regional Growth Programme

Improved trade access for exporters with Korean FTA and Trans-Pacific Partnership

Extend the Ultra-Fast Broadband network to smaller towns

Lift rural broadband speeds with the Rural Broadband Initiative

Regional roading upgrades

Education New Zealand Regional Partnership programme to grow international education

Tourism Growth Partnership Fund to grow Tourism Infrastructure

Complete Nga Haerenga – The New Zealand Cycle Trail

Attract new Investment & jobs with the Regional Investment Attraction Programme

Relaunch the Regional Business Partners Programme for Gisborne SMEs

Build Regional Business Hubs

Regional Research Institutes Programme

Strengthen Callaghan Innovation's regional footprint

Primary Growth Partnerships R & D Programme

Encourage Water Storage Projects with the Irrigation Acceleration Fund & Crown Irrigation

Unlock the productivity of Maori-owned land

Resource Management Reforms to speed up decision-making

Increase social housing provision through community providers

Māori and Pasifika Trades Training

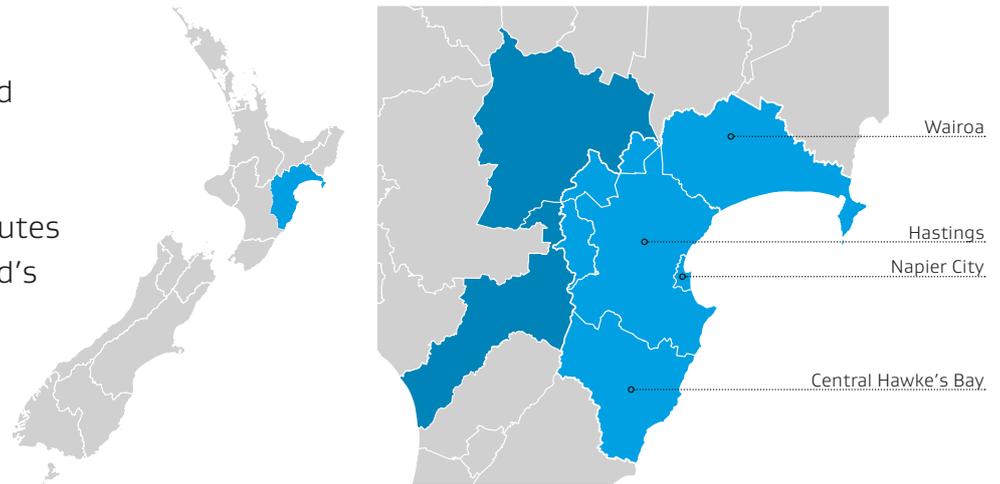
Encourage vocation training with NZ Apprenticeships programme and trades academies

Boost Regional skilled migration



Hawke's Bay

Hawke's Bay is a small-to medium sized economy and one of New Zealand's key horticulture and viticulture regions. The region contributes 2.8 per cent of New Zealand's GDP, and 3.5 per cent of New Zealand's population.



Economy

Hawke's Bay employs relatively more in the horticulture and viticulture industry than the rest of New Zealand, accounting for 6.7 per cent of employment (compared to 1.4 per cent for the rest of the country). Sheep and beef farming are important to the region as are agricultural support services. Hawke's Bay also specializes in food and beverage manufacturing, and several large multinational food processing companies are based there.

Napier City has a relatively high proportion of employment in manufacturing, specifically wood; paper and printing; and other manufacturing. The Port of Napier is a key piece of infrastructure for the entire region. Horticulture is also a relatively large employer in the city, although employment in this industry is declining.

Hastings District has one of the highest concentrations of horticulture employment of any New Zealand district, with 9.9 per cent of total employment in this industry, compared with 1.4 per cent for the rest of New Zealand. The district is a centre for apple and pear growing in New Zealand. Agricultural support services are also a large and growing employer in the district.

Central Hawke's Bay District has a strong sheep farming focus, although dairy farming employment has been growing over the past decade. Like the neighbouring Hastings District, Central Hawke's Bay has seen strong growth in agricultural support services.

Wairoa District also has a strong focus on sheep farming, as well as a large food and beverage manufacturing industry, and a fast growing forestry sector. Food and beverage manufacturing accounts for 16.8 per cent of total employment in the district, compared to 3.5 per cent for the rest of New Zealand.

Natural Resources

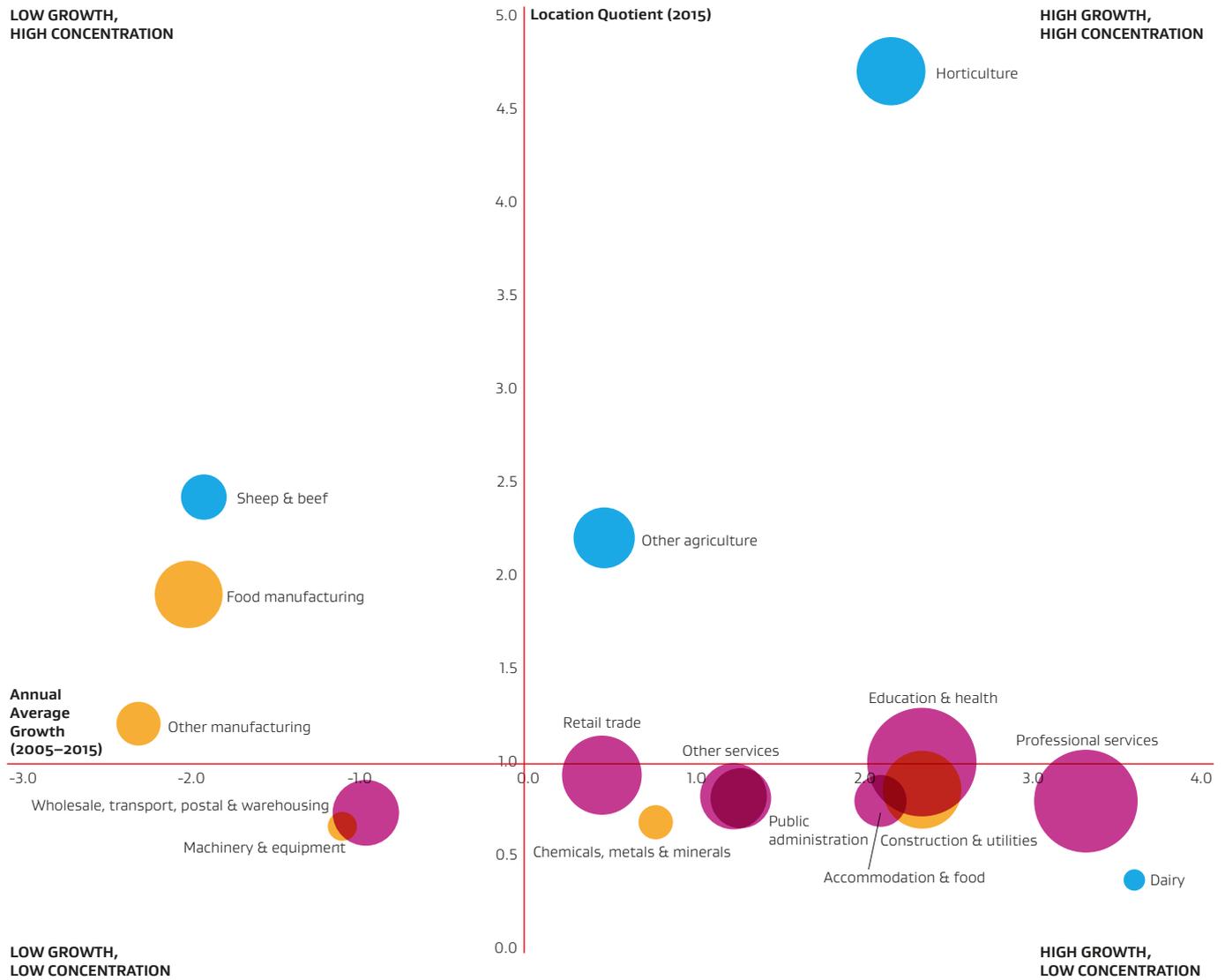
Hawke's Bay covers 1.42 million hectares along the North Island's east coast. The region's warm climate, river systems and rich alluvial soils support primary production, with around 70 per cent of total land area used for this purpose.

Living Standards and Jobs

Hawke's Bay has a relatively low mean annual household income (\$73,200) compared to the rest of New Zealand (\$89,000). Contributing factors are the dominance of lower earning primary

EMPLOYMENT BY INDUSTRY

EMPLOYMENT GROWTH AND CONCENTRATION COMPARED TO THE NATIONAL AVERAGE



NOTE: Location Quotient is the proportion of total employment in a given industry and region, divided by the proportion in that industry at a national level

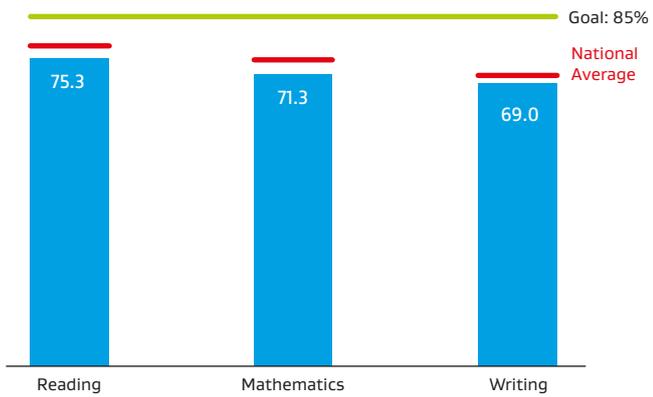
AREAS OF REGIONAL STRENGTH

INDUSTRY	SHARE OF TOTAL EMPLOYMENT			EMPLOYMENT GROWTH 2005-2015, ANNUAL AVERAGE	
	EMPLOYMENT COUNT	HAWKE'S BAY	NZ	HAWKE'S BAY	NZ
Horticulture	5,966	6.7%	1.4%	2.1%	-0.1%
Other agriculture	4,006	4.5%	1.8%	0.4%	1.4%
Grain, Sheep and Beef Cattle Farming	2,639	3.0%	1.2%	-1.9%	-2.1%
Forestry and Logging	501	0.6%	0.2%	3.6%	0.3%
Food manufacturing	5,822	6.5%	3.5%	-1.9%	0.4%

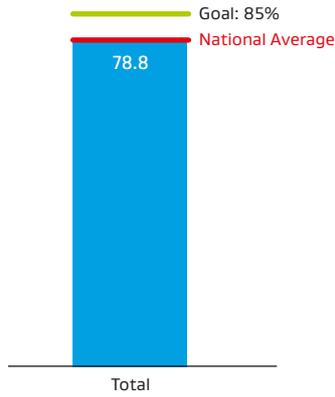
HAWKE'S BAY

SKILLS PIPELINE

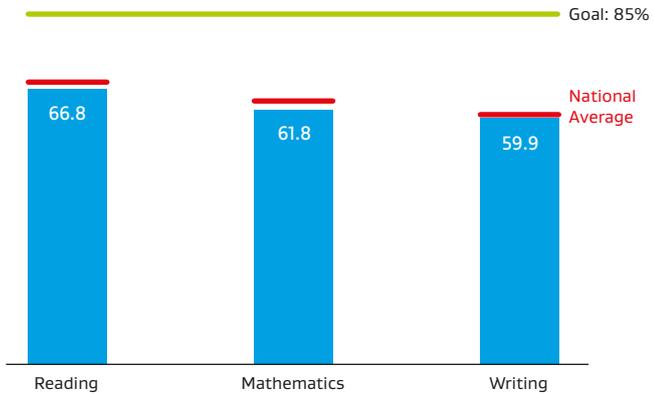
PERCENTAGE OF PRIMARY STUDENTS AT OR ABOVE NATIONAL STANDARDS, 2013



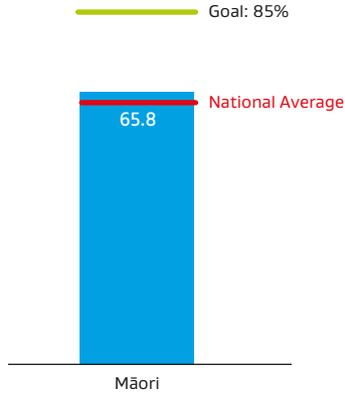
PERCENTAGE OF 18 YEAR OLDS WITH NCEA LEVEL 2 OR EQUIVALENT, 2013



PERCENTAGE OF MĀORI STUDENTS AT OR ABOVE NATIONAL STANDARDS, 2013

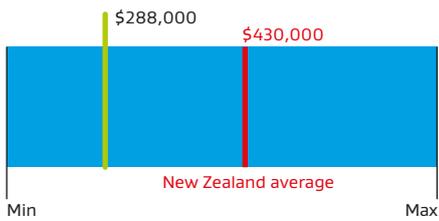


PERCENTAGE OF MĀORI 18 YEAR OLDS WITH NCEA LEVEL 2 OR EQUIVALENT, 2013



LIVING STANDARDS

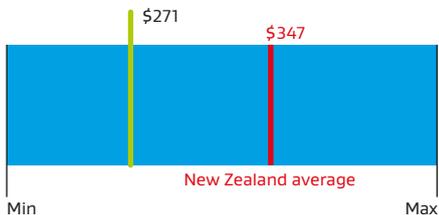
AVERAGE HOUSE PRICE, HAWKE'S BAY, 2014



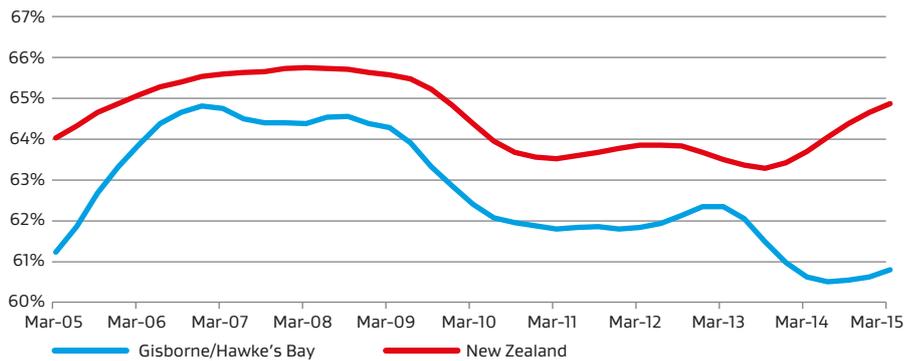
AVERAGE HOUSEHOLD INCOME, HAWKE'S BAY, 2014



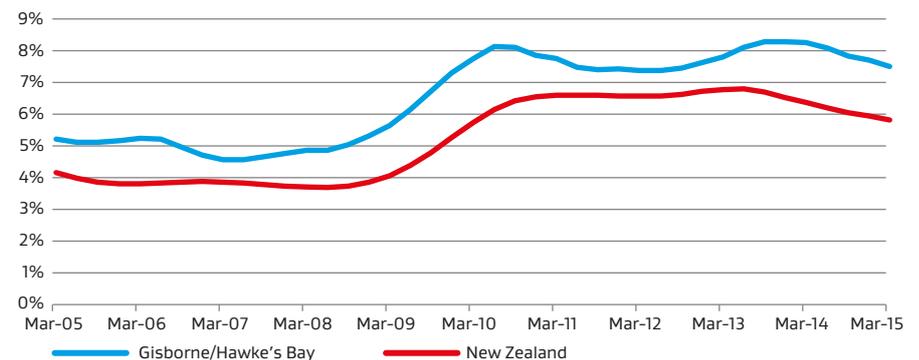
AVERAGE HOUSEHOLD WEEKLY RENT, HAWKE'S BAY, 2014



ANNUAL AVERAGE EMPLOYMENT RATES, 2005-2015



ANNUAL AVERAGE UNEMPLOYMENT RATES, 2005-2015



industries and a high proportion of unskilled labour in the workforce.

Hawke's Bay performs well in terms of educational attainment rates, although this has not translated into a highly-skilled workforce. A total of 50.2 per cent of 25–34 year olds have a level 4 qualification or higher (compared with 54.2 per cent for New Zealand as a whole), and 53.3 per cent are in skilled or highly skilled employment (compared with 58.6 per cent for New Zealand). Hawke's Bay has one of the highest NEET rates in the country.

Outlook

Improvements in irrigation capacity and water management will make

the primary sector more resilient to droughts and increase capacity for dairy farming, horticulture, viticulture, and arable cropping. There is also potential to increase economic returns from Māori assets, and for Māori to play a greater role across all sectors. Māori make up 23 per cent of the Hawke's Bay population, and will account for the majority of working-age population growth over the next two decades.

The Hawke's Bay Regional Economic Development Strategy was launched in July 2011. This led to the establishment and growth of Business Hawke's Bay and the Hawke's Bay Business Hub; the establishment of Hawke's Bay Tourism as a Regional Tourism Organization; and a number of projects around water

storage/irrigation and wise land-use. Hawke's Bay is now redeveloping its Economic Development Strategy in association with government agencies.

In 2014, the Government, working with local government partners, released a study of the economic potential of the East Coast, including both Gisborne and Hawke's Bay. The study identified the potential for growth in areas where the East Coast already has a comparative advantage, such as forestry, livestock farming and horticulture; as well as potential in tourism and domestically focused services sectors.

PEOPLE		Hawke's Bay	NZ	% of NZ
Population		158,900	4,509,700	3.5%
Share of population (%): 0–14 years		21.8	20.2	
15–24 years		12.4	14.2	
25–64 years		48.7	51.2	
65 years+		17.2	14.4	
Māori share of population (%)		22.9	14.1	
Net annual international migration		374	58,259	
Projected population growth 2013–2043, annual average		0.1	0.8	
Dependency ratio	2014	63.7	53	
	2043	94.4	68.3	

LIVING STANDARDS		Hawke's Bay	NZ	% of NZ
Regional GDP (\$m)		6,354	229,718	2.8%
GDP per capita (\$)		40,091	51,319	
Mean household income		73,200	89,000	
Median house price		288,000	430,000	
Mean weekly rent		271	347	

SKILLS & JOBS		Hawke's Bay	NZ	% of NZ
Total employment		88,979	2,504,814	3.6%
Employment rate		62.5	65.2	
Unemployment rate		6.7	5.7	
Labour force participation rate		67.0	69.1	
% of 18 year olds obtaining minimum NCEA Level 2		78.8	78.6	
NEET rate		18.1*	11.4	
% of 25–34 year olds with level 4 qualifications or higher		50.2	54.2	
Skilled and highly skilled jobs as a share of total employment		53.3	58.6	

*Combined figure for Gisborne/Hawke's Bay.

Business Growth Agenda actions relevant to Hawke's Bay

East Coast Regional Growth Programme

Improved trade access for exporters with Korean FTA and Trans-Pacific Partnership

Extend the Ultra-Fast Broadband network to smaller towns

Lift rural broadband speeds with the Rural Broadband Initiative

Develop the expressway to Napier Port link & other regional roading upgrades

Education New Zealand Regional Partnership programme to grow international education

Tourism Growth Partnership Fund to grow Tourism Infrastructure

Complete Nga Haerenga – The New Zealand Cycle Trail

Attract new investment & jobs with the Regional Investment Attraction Programme

Relaunch the Regional Business Partners Programme for Hawke's Bay SMEs

Build Regional Business Hubs

Regional Research Institutes Programme

Strengthen Callaghan Innovation's regional footprint

Primary Growth Partnerships R & D Programme

Encourage Water Storage Projects with the Irrigation Acceleration Fund & Crown Irrigation

Unlock the productivity of Maori-owned land

Resource Management Reforms to speed up decision-making

Increase social housing provision through community providers

Māori and Pasifika Trades Training

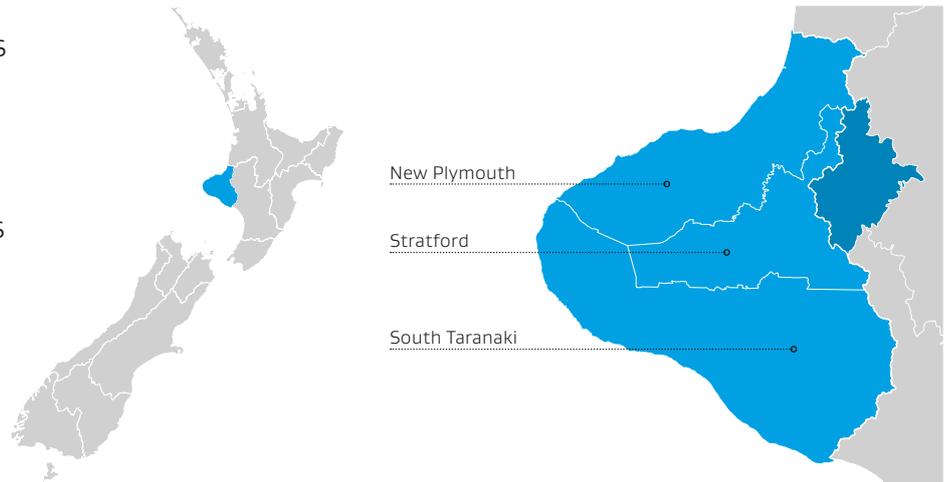
Encourage vocation training with NZ Apprenticeships programme and trades academies

Boost Regional skilled migration



Taranaki

Taranaki has the highest gross domestic product (GDP) per capita in New Zealand. The region contributes 4 per cent of New Zealand’s GDP and has 2.5 per cent of the country’s population.



Economy

Taranaki’s regional economy capitalises on its natural resources that underpin the oil and gas industry and the various agricultural businesses in the region.

The oil and gas sector is of strategic importance to the region and nation, and provides about 41 per cent of the regional GDP and 2.2 per cent of regional employment. Natural gas from Taranaki’s fields contributes over 20 per cent of our nation’s primary energy supply. Gas also forms an important component in added-value manufacturing, such as methanol produced from facilities near Waitara and exported from Port Taranaki as well as the production of urea fertiliser in South Taranaki for use on New Zealand farms. Supporting the oil and gas industry is an extensive supply chain of specialist companies involved in engineering, specialised technical and consultancy services, transportation, distribution, machine and equipment manufacturing, and construction. Declines in world oil prices have led to some short term uncertainty and project delays within the region’s oil and gas industry.

The agriculture, forestry and fishing sector remains an integral part of the regional economy. In 2015, this sector contributed 11.9 per cent of regional

employment. Dairy farming makes up more than 60 per cent of the total employment in agriculture, forestry and fishing. However, employment in dairy farming has declined by 1.9 per cent per annum over the previous ten years. This could be partly due to the established nature of dairying in the region and continuing improvements in on-farm productivity.

The manufacturing sector has the largest share of employment (14.5 per cent) in the region. Of the total employment in this sector, 45 per cent is in food and beverage manufacturing and 28 per cent is in chemicals, minerals and metals manufacturing. Building on its natural advantages, Taranaki has a strong engineering sector, including an extensive track record in heavy engineering. Tourism is a growing industry for the region, based both on natural attractions, such as Egmont National Park, and cultural attractions, such as the Len Lye Centre in New Plymouth.

Natural Resources

Taranaki is dominated by the mountain for which it is named, Mount Taranaki, a dormant volcano contained within Egmont National Park. The ring plain surrounding the mountain consists mainly of fertile volcanic soil, suitable

EMPLOYMENT BY INDUSTRY

EMPLOYMENT GROWTH AND CONCENTRATION COMPARED TO THE NATIONAL AVERAGE

LOW GROWTH,
HIGH CONCENTRATION



NOTE: Location Quotient is the proportion of total employment in a given industry and region, divided by the proportion in that industry at a national level

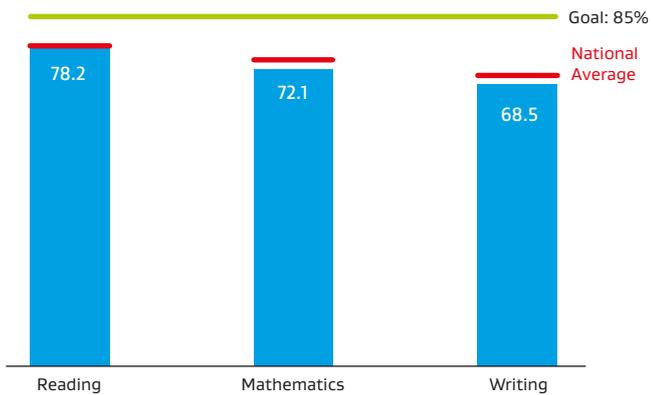
AREAS OF REGIONAL STRENGTH

INDUSTRY	SHARE OF TOTAL EMPLOYMENT			EMPLOYMENT GROWTH 2005–2015, ANNUAL AVERAGE	
	EMPLOYMENT COUNT	TARANAKI	NZ	TARANAKI	NZ
Mining	1,399	2.2%	0.3%	8.7%	3.8%
Dairy Cattle Farming	3,775	6.0%	1.7%	-1.9%	1.0%
Food manufacturing	4,092	6.5%	3.5%	0.2%	0.4%
Chemical, metal and mineral manufacturing	2,523	4.0%	2.4%	1.7%	-0.7%
Machinery and equipment manufacturing	1,514	2.4%	1.8%	2.4%	-0.6%

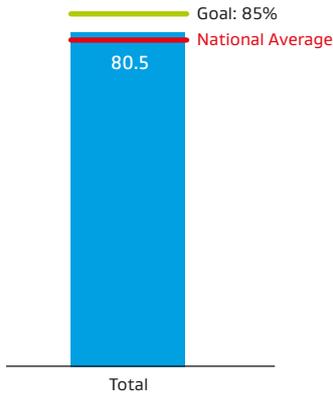
TARANAKI

SKILLS PIPELINE

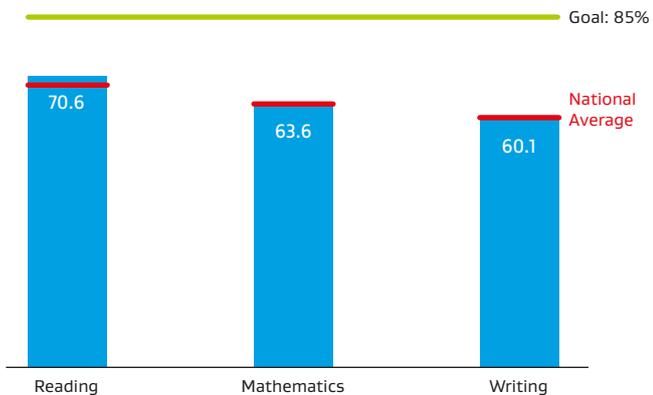
PERCENTAGE OF PRIMARY STUDENTS AT OR ABOVE NATIONAL STANDARDS, 2013



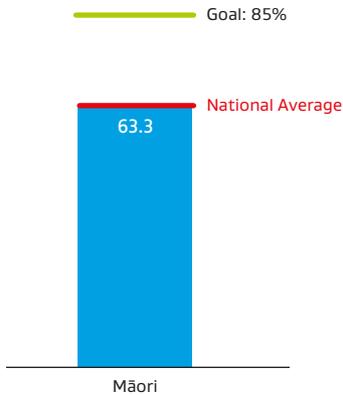
PERCENTAGE OF 18 YEAR OLDS WITH NCEA LEVEL 2 OR EQUIVALENT, 2013



PERCENTAGE OF MĀORI STUDENTS AT OR ABOVE NATIONAL STANDARDS, 2013

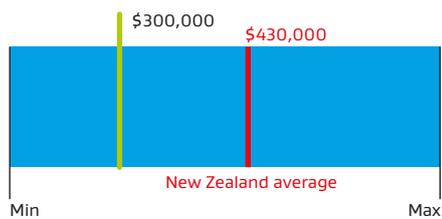


PERCENTAGE OF MĀORI 18 YEAR OLDS WITH NCEA LEVEL 2 OR EQUIVALENT, 2013



LIVING STANDARDS

AVERAGE HOUSE PRICE, TARANAKI, 2014



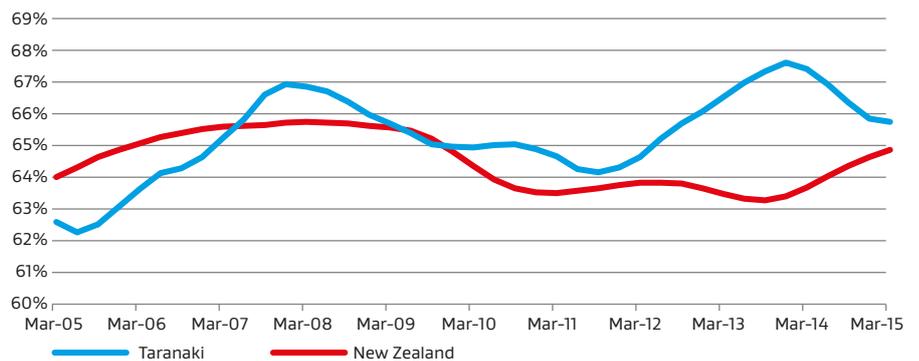
AVERAGE HOUSEHOLD INCOME, TARANAKI, 2014



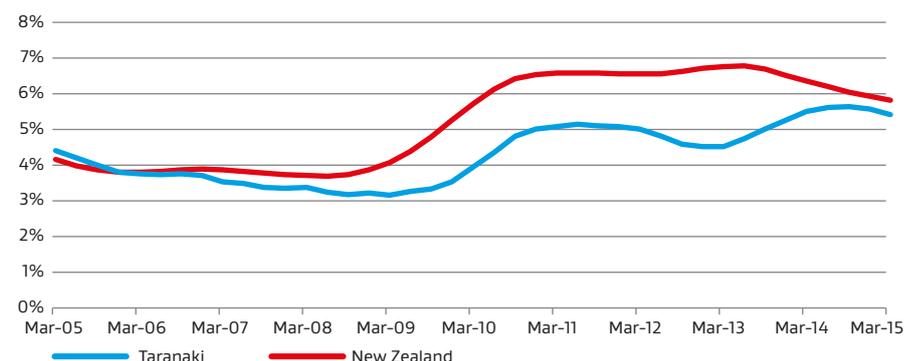
AVERAGE HOUSEHOLD WEEKLY RENT, TARANAKI, 2014



ANNUAL AVERAGE EMPLOYMENT RATES, 2005–2015



ANNUAL AVERAGE UNEMPLOYMENT RATES, 2005–2015



for supporting intensive pastoral farming, especially dairy. The rolling hill country to the east is more suitable for sheep and beef cattle.

The Taranaki Basin is the location of New Zealand's only commercially developed and producing oil and gas fields.

Living Standards and Jobs

Taranaki's mean household income of \$88,400 is just under the national average of \$89,000.

In 2013, 80.5 per cent of 18 year olds had NCEA Level 2 or equivalent. This

is up 1.7 percentage points on the previous year, and compares favourably to 78.6 per cent across the entire country. Despite this, the proportion of 25–34 year olds with Level 4 or higher qualifications is well below the national average (45.3 per cent compared with 54.2 per cent).

Outlook

Taranaki is projected to face an ageing population base. The region will need to diversify in the years ahead, and develop an industry mix that will build resilience to industry shocks and stimulate employment

and population growth in the region. Building a diversified economy will complement Taranaki's strength in mining and agriculture to ensure that high-value support industries such as those related to transport, business services, commercial property, and manufacturing continue to grow alongside the region's key sectors.

PEOPLE	Taranaki	NZ	% of NZ
Population	114,800	4,509,700	2.5%
Share of population (%): 0–14 years	21.0	20.2	
15–24 years	12.2	14.2	
25–64 years	50.4	51.2	
65 years+	16.4	14.4	
Māori share of population (%)	16.6	14.1	
Net annual international migration	387	58,259	
Projected population growth 2013–2043, annual average	0.5	0.8	
Dependency ratio	2014	59.9	53
	2043	81.2	68.3

LIVING STANDARDS	Taranaki	NZ	% of NZ
Regional GDP (\$m)	9,170	229,718	4.0%
GDP per capita (\$)	80,297	51,319	
Mean household income	88,400	89,000	
Median house price	300,000	430,000	
Mean weekly rent	291	347	

SKILLS & JOBS	Taranaki	NZ	% of NZ
Total employment	62,842	2,504,814	2.5%
Employment rate	66.0	65.2	
Unemployment rate	5.2	5.7	
Labour force participation rate	69.7	69.1	
% of 18 year olds obtaining minimum NCEA Level 2	80.5	78.6	
NEET rate	13.3	11.4	
% of 25–34 year olds with level 4 qualifications or higher	45.3	54.2	
Skilled and highly skilled jobs as a share of total employment	58.6	58.6	



Business Growth Agenda actions relevant to Taranaki

Improved trade access for exporters with Korean FTA and Trans-Pacific Partnership

Extend the Ultra-Fast Broadband network to smaller towns

Lift rural broadband speeds with the Rural Broadband Initiative

Complete Vickers to City project including second Waiwakaiho Bridge

Construct Normanby Overbridge & other regional roading upgrades

Education New Zealand Regional Partnership programme to grow international education

Tourism Growth Partnership Fund to grow Tourism Infrastructure

Complete Nga Haerenga – The New Zealand Cycle Trail

Attract new Investment & jobs with the Regional Investment Attraction Programme

Relaunch the Regional Business Partners Programme for Taranaki SMEs

Build Regional Business Hubs

Regional Research Institutes Programme

Strengthen Callaghan Innovation's regional footprint

Primary Growth Partnerships R & D Programme

Unlock the productivity of Maori-owned land

Resource Management Reforms to speed up decision-making

Increase social housing provision through community providers

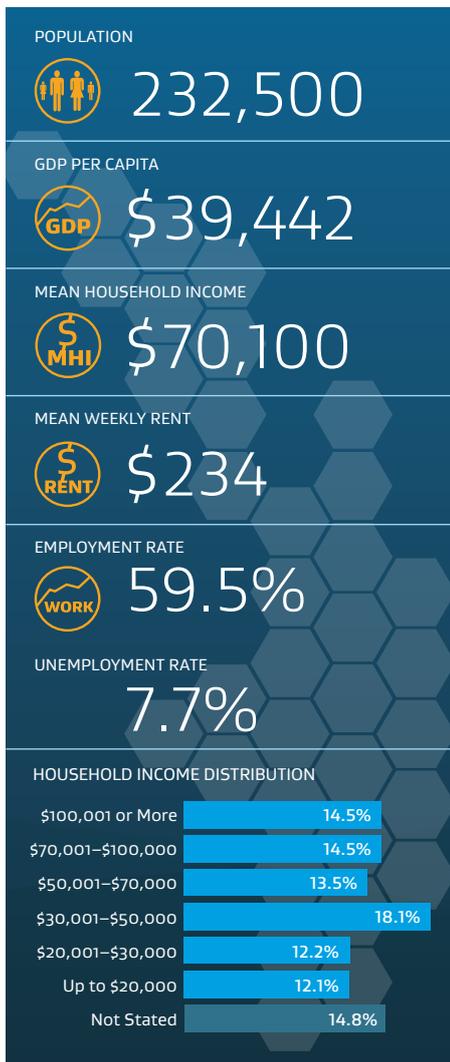
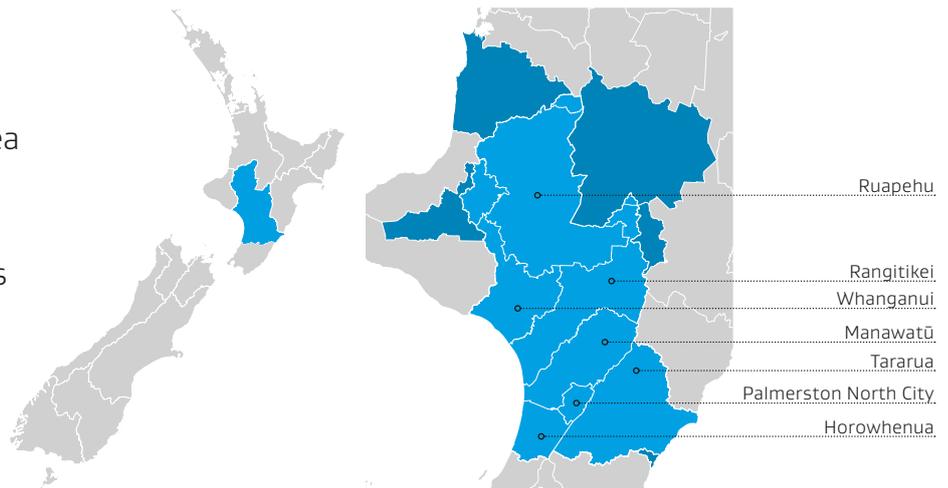
Māori and Pasifika Trades Training

Encourage vocation training with NZ Apprenticeships programme and trades academies

Boost Regional skilled migration



The Manawatū-Whanganui region is the second largest North Island region by land area with a diverse range of natural resources and economic activity. The region contributes 4 per cent of New Zealand’s GDP, and 5.2 per cent of New Zealand’s population.



Economy

The Manawatū-Whanganui economy is dominated by agriculture, with high concentrations of sheep and beef and dairy farming. The region accounts for 15 per cent of New Zealand’s beef cattle and 18 per cent of the national sheep flock. There has been dairy farm expansion and intensification in the Manawatū and Horowhenua Districts.

Sheep farming employs relatively more people in the Tongariro, Tararua and Rangitikei Districts than in other parts of the country. Rangitikei has also seen some sharp growth in its manufacturing sector over the past decade, particularly meat processing. Tararua has also seen growth in manufacturing, and the emergence of some niche areas of specialisation within chemical and machinery manufacturing.

Manawatū, Horowhenua and Tararua Districts have seen strong growth in dairy farming over the past decade. Horowhenua also has a substantial horticulture industry, particularly vegetable and mushroom growing.

Although the primary sector provides a solid foundation for the regional economy, there is increasing diversity. The main campus for Massey University is located in Palmerston

North City, along with a number of central government departments. Consequently, the city has high levels of employment in education and training and public administration. As the main population centre in the region, it also has strengths in health care and social assistance. Whanganui District has a diverse manufacturing sector, with relatively high levels of employment in other manufacturing (mainly clothing, leather and furniture manufacturing), and food and beverage manufacturing (predominately meat processing).

Natural Resources

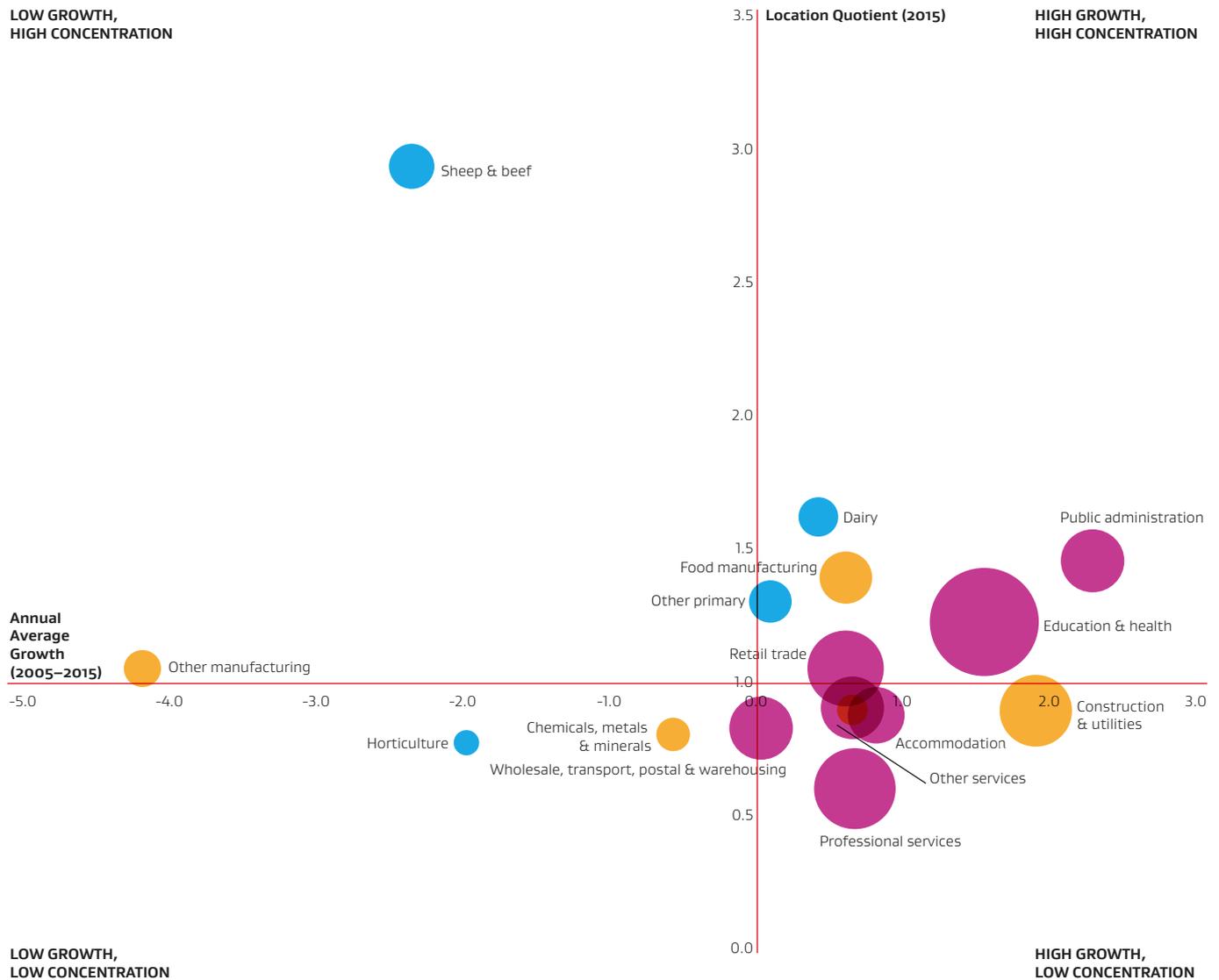
Manawatū-Whanganui takes up a large portion of the lower half of the North Island, covering 22,215 square kilometres (8.1 per cent of New Zealand’s land area). Around half the land area is used for agriculture, with semi-intensive sheep and beef farming across the hill country, particularly Rangitikei District, and concentrations of intensive dairy and sheep farming in the fertile plains of Manawatū and Horowhenua Districts.

Significant parts of the region are protected as part of the conservation estate, including the Tongariro and Whanganui National Parks.

EMPLOYMENT BY INDUSTRY

EMPLOYMENT GROWTH AND CONCENTRATION COMPARED TO THE NATIONAL AVERAGE

LOW GROWTH,
HIGH CONCENTRATION



LOW GROWTH,
LOW CONCENTRATION

HIGH GROWTH,
LOW CONCENTRATION

NOTE: Location Quotient is the proportion of total employment in a given industry and region, divided by the proportion in that industry at a national level

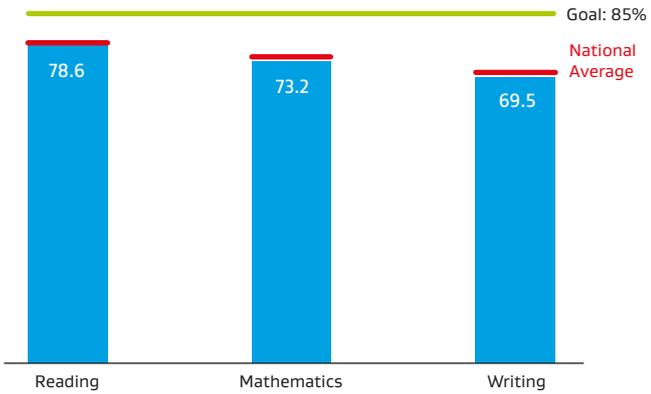
AREAS OF REGIONAL STRENGTH

INDUSTRY	SHARE OF TOTAL EMPLOYMENT			EMPLOYMENT GROWTH 2005–2015, ANNUAL AVERAGE	
	EMPLOYMENT COUNT	MANAWATŪ-WHANGANUI	NZ	MANAWATŪ-WHANGANUI	NZ
Grain, Sheep and Beef Cattle Farming	4,363	3.6%	1.2%	-2.3%	-2.1%
Dairy Cattle Farming	3,324	2.7%	1.7%	0.4%	1.0%
Other agriculture	3,288	2.7%	1.8%	-0.1%	1.4%
Public Administration and Safety	8,499	7.0%	4.8%	2.2%	3.6%
Other manufacturing	1,617	1.3%	0.9%	-4.9%	-4.7%

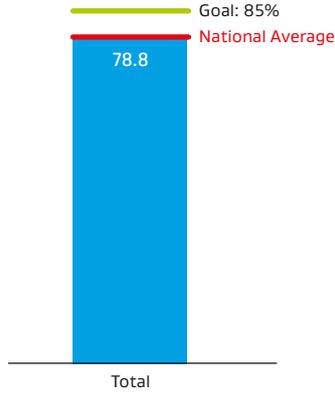
MANAWATŪ-WHANGANUI

SKILLS PIPELINE

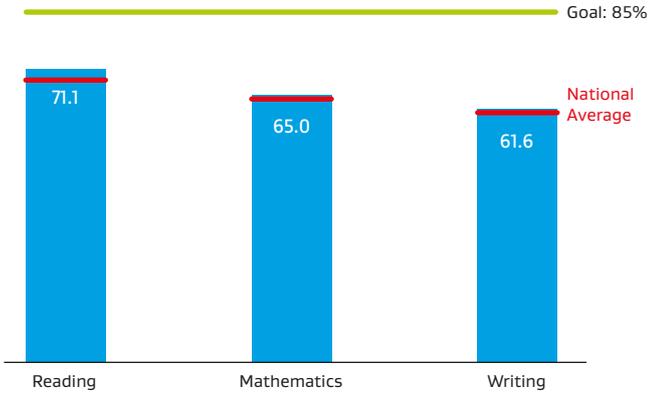
PERCENTAGE OF PRIMARY STUDENTS AT OR ABOVE NATIONAL STANDARDS, 2013



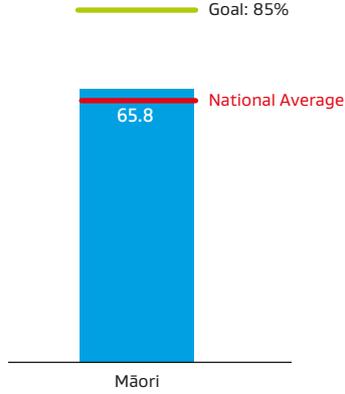
PERCENTAGE OF 18 YEAR OLDS WITH NCEA LEVEL 2 OR EQUIVALENT, 2013



PERCENTAGE OF MĀORI STUDENTS AT OR ABOVE NATIONAL STANDARDS, 2013

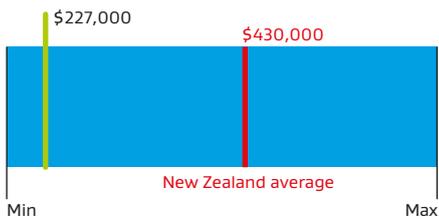


PERCENTAGE OF MĀORI 18 YEAR OLDS WITH NCEA LEVEL 2 OR EQUIVALENT, 2013



LIVING STANDARDS

AVERAGE HOUSE PRICE, MANAWATŪ-WHANGANUI, 2014



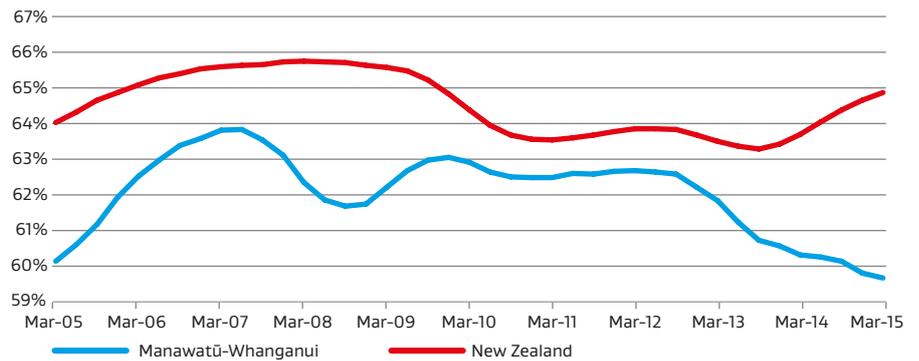
AVERAGE HOUSEHOLD INCOME, MANAWATŪ-WHANGANUI, 2014



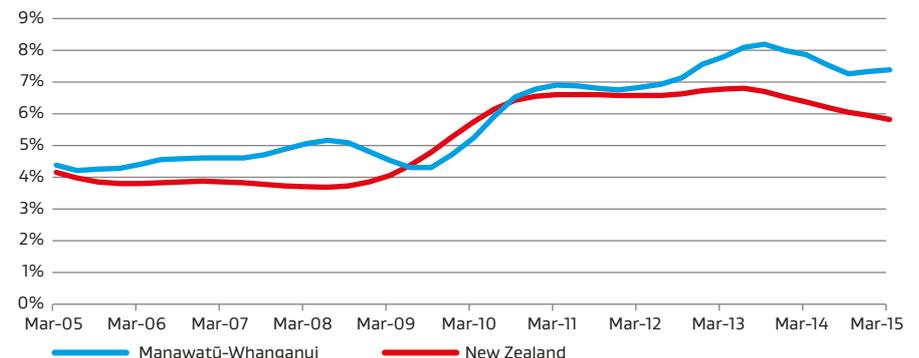
AVERAGE HOUSEHOLD WEEKLY RENT, MANAWATŪ-WHANGANUI, 2014



ANNUAL AVERAGE EMPLOYMENT RATES, 2005–2015



ANNUAL AVERAGE UNEMPLOYMENT RATES, 2005–2015



Living Standards and Jobs

Manawatū-Whanganui's mean annual household income of \$70,100 is below the national average. Incomes within the region range from a low of \$58,900 in Horowhenua District to a high of \$79,100 in Palmerston North City. However, lower incomes are offset by lower housing costs.

In 2013, 78.8 per cent of 18 year olds in the region had NCEA Level 2 or equivalent, slightly above the national average and up 1.8 percentage points on the previous year. However, Manawatū-Whanganui has a higher proportion of youth not in employment, education or training (NEET) when compared nationally. This suggests youth find it comparatively harder to access employment in the region.

The region specialises in industries which tend to have lower pay rates and levels of employment. These regional economic patterns are reflected in lower incomes and lower labour market participation in the region.

Outlook

Government, in association with regional stakeholders, recently published an independent study identifying short-to-medium term business growth opportunities for Manawatū-Whanganui. The study identified a number of advantages the region can build on, including its central North Island location (with good road and rail transport links); its highly productive agricultural industries, particularly high-country

beef and lamb and notable institutions like Massey University and agricultural research facilities with an international reputation.

The study concluded there are excellent opportunities for tourism, dairy, sheep and beef, Manuka honey, poultry and grain processing, vegetable growing, care for older people, and business process outsourcing. Unlocking the region's potential will also depend on addressing cross-cutting enabling opportunities, such as distribution and transport infrastructure, productivity of Māori land, and small business development.

PEOPLE	Manawatū-Whanganui	NZ	% of NZ
Population	232,500	4,509,700	5.2%
Share of population (%): 0–14 years	20.4	20.2	
15–24 years	14.3	14.2	
25–64 years	48.5	51.2	
65 years+	16.8	14.4	
Māori share of population (%)	19.6	14.1	
Net annual international migration	797	58,259	
Projected population growth 2013–2043, annual average	0.1	0.8	
Dependency ratio			
2014	59.2	53	
2043	81.4	68.3	

LIVING STANDARDS	Manawatū-Whanganui	NZ	% of NZ
Regional GDP (\$m)	9,147	229,718	4.0%
GDP per capita (\$)	39,442	51,319	
Mean household income	70,100	89,000	
Median house price	227,000	430,000	
Mean weekly rent	234	347	

SKILLS & JOBS	Manawatū-Whanganui	NZ	% of NZ
Total employment	121,465	2,504,814	4.8%
Employment rate	59.5	65.2	
Unemployment rate	7.7	5.7	
Labour force participation rate	64.4	69.1	
% of 18 year olds obtaining minimum NCEA Level 2	78.8	78.6	
NEET rate	16.5	11.4	
% of 25–34 year olds with level 4 qualifications or higher	43.0	54.2	
Skilled and highly skilled jobs as a share of total employment	53.7	58.6	

Business Growth Agenda actions relevant to Manawatū-Whanganui

Manawatū-Whanganui Regional Growth Programme

Improved trade access for exporters with Korean FTA and Trans-Pacific Partnership

Extend the Ultra-Fast Broadband network to smaller towns

Lift rural broadband speeds with the Rural Broadband Initiative

Regional roading upgrades

Complete the Levin to Wellington Road of National Significance to link the region with Wellington

Education New Zealand Regional Partnership programme to grow international education

Tourism Growth Partnership Fund to grow Tourism Infrastructure

Complete Nga Haerenga – The New Zealand Cycle Trail

Attract new investment & jobs with the Regional Investment Attraction Programme

Relaunch the Regional Business Partners Programme for Manawatū-Whanganui SMEs

Build Regional Business Hubs

Regional Research Institutes Programme

Strengthen Callaghan Innovation's regional footprint

Primary Growth Partnerships R & D Programme

Unlock the productivity of Maori-owned land

Resource Management Reforms to speed up decision-making

Increase social housing provision through community providers

Māori and Pasifika Trades Training

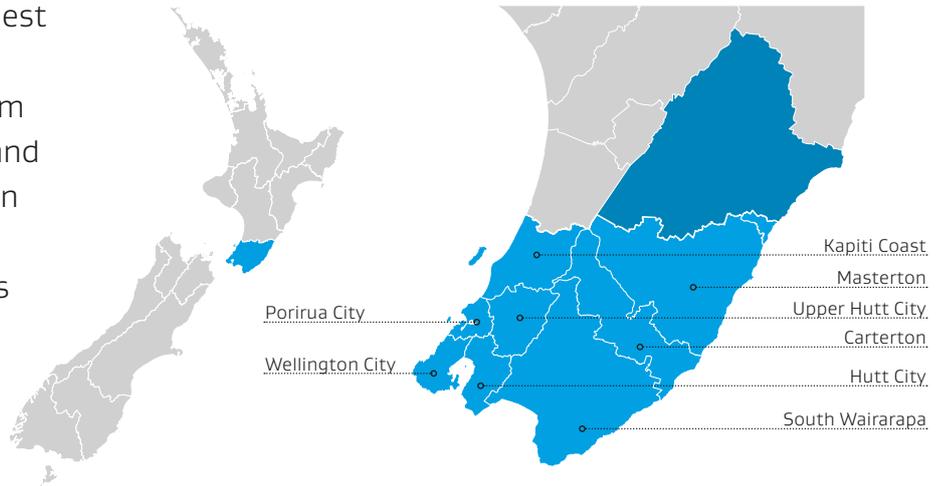
Encourage vocation training with NZ Apprenticeships programme and trades academies

Boost Regional skilled migration



Wellington

Wellington has the second-largest economy in New Zealand, with economic activities ranging from public services, screen, digital and information and communication technologies (ICT), to food and tourism. The region contributes 13.2 per cent of New Zealand's GDP, and has 10.9 per cent of New Zealand's population.



Economy

Wellington City, as the national capital, has a strong specialisation in public administration and safety, which accounts for 12.3 per cent of the city's employment, compared to 4.8 per cent for New Zealand. Relatively high employment in public administration is also present in other local authorities, reflecting major institutions and agencies situated throughout the region.

The region also has a high proportion of employment in knowledge-intensive services, particularly in Wellington City. These include professional, scientific and administrative services (17.1 per cent of Wellington's City employment, compared to 8.7 per cent for New Zealand); financial and insurance services (4.5 per cent compared to 2.6 per cent); and information, media and telecommunications (4.0 per cent compared to 2.0 per cent). Wellington is home to New Zealand's film industry, generating 79 per cent of New Zealand's total feature film revenue in 2014, and has consequently developed an internationally-recognised cluster of post-production and visual effects technology. The

city also has a fast-growing, creative software development industry.

Hutt Valley is the base for a number of specialist manufacturing and distribution industries. For Porirua and Kapiti Coast, employment is relatively higher in the construction, education and health sectors.

The districts of the Wairarapa have a strong primary sector focus. There is an above-average concentration of employment in sheep, beef cattle and grain farming, particularly in South Wairarapa and Masterton Districts. South Wairarapa also has relatively high concentration of employment in viticulture. Although dairy farming has not shown the same pace of growth as in other rural regions, dairy employment outnumbers sheep farm employment in Carterton and South Wairarapa Districts. Tourism is becoming increasingly important, building on the area's viticulture and scenic attractions.

Natural Resources

The Wellington region is predominately urban, with rural activity concentrated on the Kapiti Coast and the Wairarapa districts. Wairarapa has long been a sheep-farming centre, although recent

EMPLOYMENT BY INDUSTRY

EMPLOYMENT GROWTH AND CONCENTRATION COMPARED TO THE NATIONAL AVERAGE



NOTE: Location Quotient is the proportion of total employment in a given industry and region, divided by the proportion in that industry at a national level

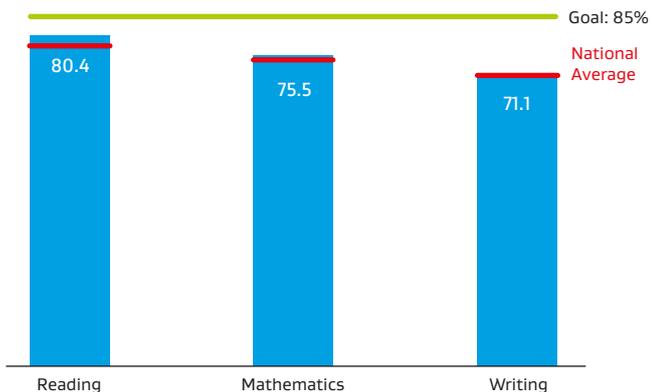
AREAS OF REGIONAL STRENGTH

INDUSTRY	SHARE OF TOTAL EMPLOYMENT			EMPLOYMENT GROWTH 2005-2015, ANNUAL AVERAGE	
	EMPLOYMENT COUNT	WELLINGTON	NZ	WELLINGTON	NZ
Public Administration and Safety	29,936	10.5%	4.8%	3.7%	3.6%
Information Media and Telecommunications	8,733	3.1%	2.0%	0.2%	0.8%
Professional, Scientific and Technical Services	37,226	13.0%	8.7%	2.4%	2.5%
Financial and Insurance Services	11,042	3.9%	2.6%	0.8%	2.1%
Arts and Recreation Services	6,840	2.4%	2.0%	4.8%	3.7%

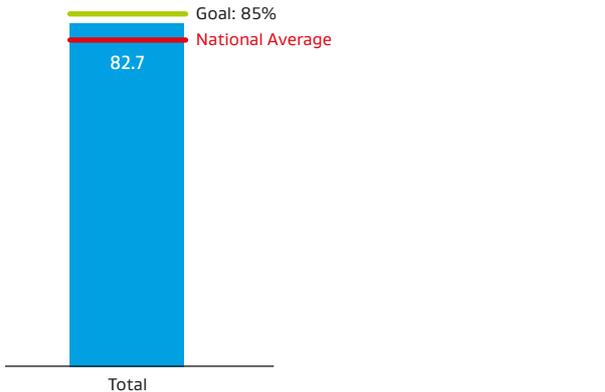
WELLINGTON

SKILLS PIPELINE

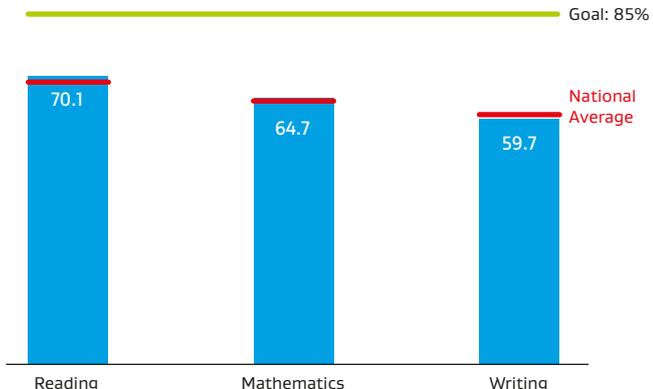
PERCENTAGE OF PRIMARY STUDENTS AT OR ABOVE NATIONAL STANDARDS, 2013



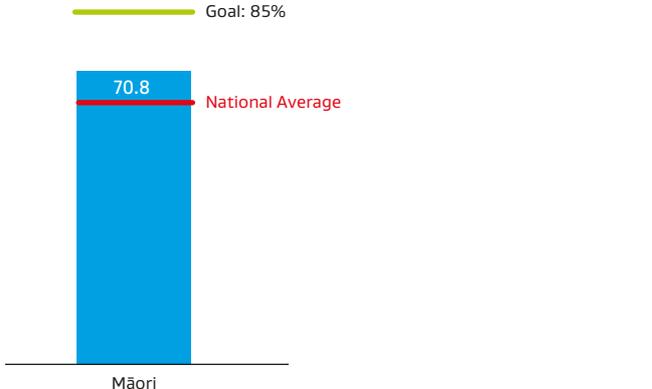
PERCENTAGE OF 18 YEAR OLDS WITH NCEA LEVEL 2 OR EQUIVALENT, 2013



PERCENTAGE OF MĀORI STUDENTS AT OR ABOVE NATIONAL STANDARDS, 2013

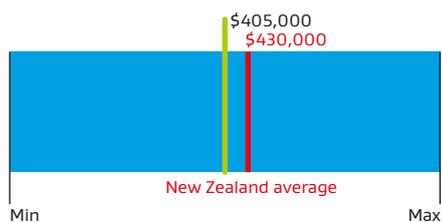


PERCENTAGE OF MĀORI 18 YEAR OLDS WITH NCEA LEVEL 2 OR EQUIVALENT, 2013

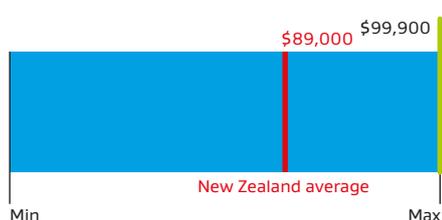


LIVING STANDARDS

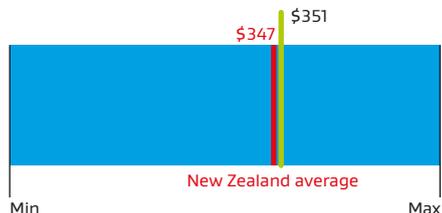
AVERAGE HOUSE PRICE, WELLINGTON, 2014



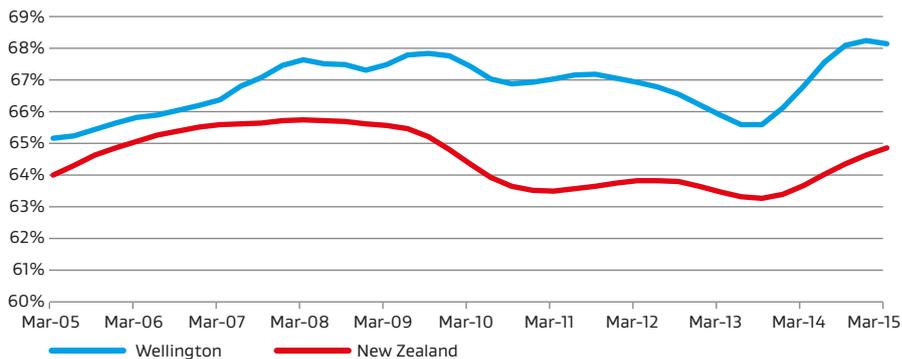
AVERAGE HOUSEHOLD INCOME, WELLINGTON, 2014



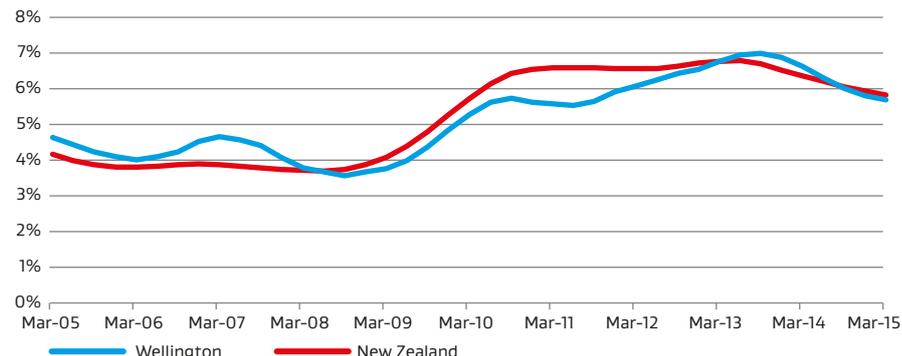
AVERAGE HOUSEHOLD WEEKLY RENT, WELLINGTON, 2014



ANNUAL AVERAGE EMPLOYMENT RATES, 2005–2015



ANNUAL AVERAGE UNEMPLOYMENT RATES, 2005–2015



years have seen increasing conversion to dairy, as well as vineyard planting on the gravelly plains, and forest planting in the hills.

Living Standards and Jobs

Wellington's mean household income of \$99,900 is the highest in the country. Average household incomes diverge substantially across the region, from a high of \$116,600 in Wellington City, to a low of \$69,200 in Masterton District.

The high income levels partially reflect the kind of employment available in the region: 75.9 per cent of Wellington City's employment is in high-skilled occupations, the highest proportion of any territorial authority in the country by a wide margin. The Wellington region

also has the highest proportion of working-age people in New Zealand, and above-average employment rates, which will also serve to increase household income.

Outlook

The region is becoming more diverse and building its strength in a broad range of sectors. The region's strengths are in: innovation, research and development, and information technology. This is shown by recent developments in the film and media sector, and collaboration between businesses and tertiary education and research institutions.

Major infrastructure projects like Transmission Gully and the Kapiti

Expressway are creating short-term employment opportunities in construction. These and other infrastructure projects will support further regional growth.

A key challenge for the region over the coming years is to grow retail and attract skills. The region is, however, on track to meet Better Public Services education goals, particularly for Māori and Pasifika students, and its working age population has the highest levels of educational attainment in New Zealand. The region remains a major destination for highly skilled migrants, supplementing the skills needs of the regional economy.

PEOPLE	Wellington	NZ	% of NZ
Population	491,400	4,509,700	10.9%
Share of population (%): 0–14 years	19.3	20.2	
15–24 years	14.6	14.2	
25–64 years	52.6	51.2	
65 years+	13.5	14.4	
Māori share of population (%)	12.4	14.1	
Net annual international migration	1,864	58,259	
Projected population growth 2013–2043, annual average	0.4	0.8	
Dependency ratio	2014	48.8	53
	2043	67.2	68.3

LIVING STANDARDS	Wellington	NZ	% of NZ
Regional GDP (\$m)	30,335	229,718	13.2%
GDP per capita (\$)	62,021	51,319	
Mean household income	99,900	89,000	
Median house price	405,000	430,000	
Mean weekly rent	351	347	

SKILLS & JOBS	Wellington	NZ	% of NZ
Total employment	286,031	2,504,814	11.4%
Employment rate	67.7	65.2	
Unemployment rate	5.7	5.7	
Labour force participation rate	71.8	69.1	
% of 18 year olds obtaining minimum NCEA Level 2	82.7	78.6	
NEET rate	10.2	11.4	
% of 25–34 year olds with level 4 qualifications or higher	61.4	54.2	
Skilled and highly skilled jobs as a share of total employment	64.5	58.6	

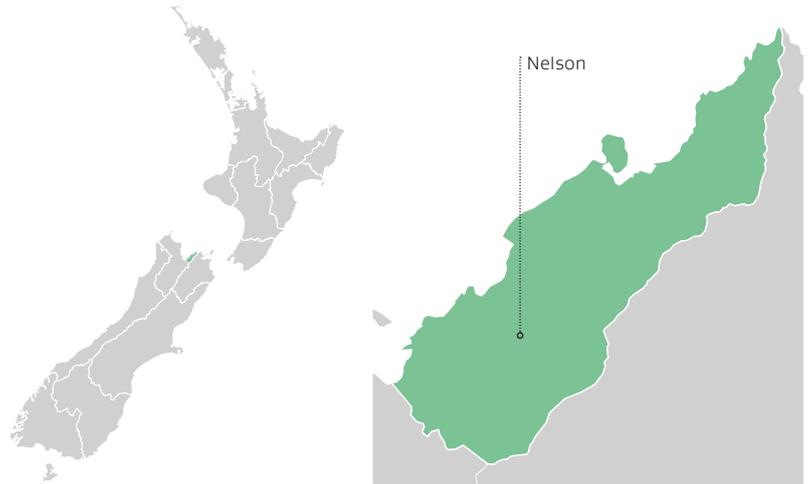
Business Growth Agenda actions relevant to Wellington

- Extend the Ultra-Fast Broadband network to smaller towns
- Lift rural broadband speeds with the Rural Broadband Initiative
- The Levin to Airport Road of National Significance including Kapiti Expressway and Transmission Gully
- Construct the Haywards Interchange and other regional roading upgrades
- Education New Zealand Regional Partnership programme to grow international education
- Tourism Growth Partnership Fund to grow Tourism Infrastructure
- Complete Nga Haerenga – The New Zealand Cycle Trail
- Attract new Investment & jobs with the Regional Investment Attraction Programme
- Relaunch the Regional Business Partners Programme for Wellington SMEs
- Build Regional Business Hubs
- Strengthen Callaghan Innovation's regional footprint
- Primary Growth Partnerships R & D Programme
- Encourage Water Storage Projects with the Irrigation Acceleration Fund & Crown Irrigation
- Unlock the productivity of Maori-owned land
- Resource Management Reforms to speed up decision-making
- Increase supply of affordable housing through Housing Accords and Special Housing Areas
- Increase social housing provision through community providers
- Māori and Pasifika Trades Training
- Encourage vocation training with NZ Apprenticeships programme and trades academies
- Boost Regional skilled migration
- Establish ICT graduate schools
- Improved trade access for exporters with Korean FTA and Trans-Pacific Partnership



Nelson

Nelson is the smallest of New Zealand's regions by land area. It serves as an urban centre and infrastructure hub for the primary production regions of Tasman and Marlborough, and a tourism centre for the many natural attractions in the area. The combined Nelson/Tasman region contributes 1.8 per cent of New Zealand's GDP.



*Combined figure for Nelson/Tasman

Economy

Nelson's economy is diverse for its size, with a high proportion of its employment in the health care and social assistance, retail, and professional, scientific and technical services sectors.

Nelson City provides domestic and international connectivity for the surrounding wine, pipfruit, seafood and forestry industries. Nelson has the fourth-busiest commercial airport in New Zealand, and Port Nelson is the largest fishing port in Australasia.

The fishing industry is an important contributor to the region, accounting for 1.6 per cent of employment in Nelson (this industry accounts for just 0.2 per cent of employment across the rest of New Zealand). The region is also home to the Cawthron Institute, New Zealand's largest independent science organisation, which undertakes research and testing for the marine and freshwater environment and industry.

Nelson also specialises in wood, paper and printing manufacturing and food and beverage manufacturing. The region has developed niche marine construction and aviation manufacturing engineering clusters, which provide opportunities to

accelerate growth and employment in these sectors.

Natural Resources

Nelson has the most urbanised population of all New Zealand's regions, with 98.3 per cent of inhabitants living in an urban environment. Almost a quarter of Nelson's land area is used for exotic forestry production, and about a third is native cover. A small proportion is used for agriculture.

Living Standards and Jobs

Nelson's mean annual household income of \$83,500 is below the national average of \$89,000. Nelson's population is among the country's oldest, with 18 per cent of people aged 65 years and over (compared with 14 per cent nationally). Only Marlborough has a higher proportion of its population being past retirement age. Nelson experienced annual average employment growth of 0.2 per cent between 2004 and 2014, compared to 1.7 per cent for Tasman, 3.0 per cent for Marlborough, and 1.2 per cent for New Zealand.

The educational achievements of Nelson's youth population is among the best in the country. A total of

EMPLOYMENT BY INDUSTRY

EMPLOYMENT GROWTH AND CONCENTRATION COMPARED TO THE NATIONAL AVERAGE



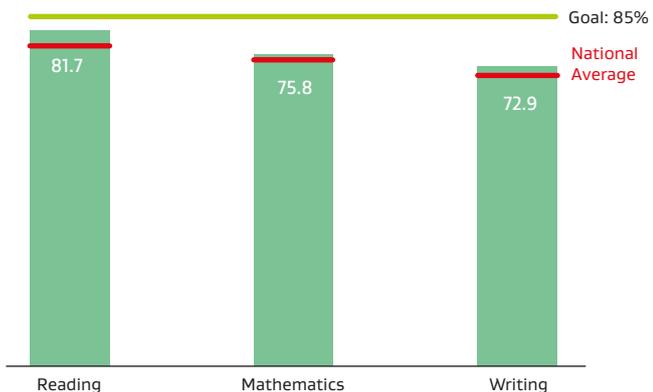
NOTE: Location Quotient is the proportion of total employment in a given industry and region, divided by the proportion in that industry at a national level

AREAS OF REGIONAL STRENGTH

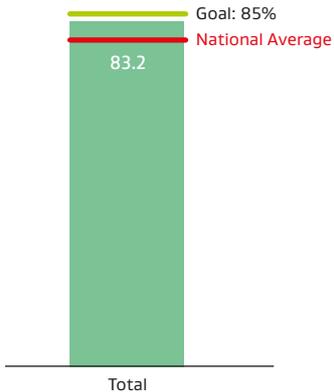
INDUSTRY	SHARE OF TOTAL EMPLOYMENT			EMPLOYMENT GROWTH 2005–2015, ANNUAL AVERAGE	
	EMPLOYMENT COUNT	NELSON	NZ	NELSON	NZ
Fishing	552	1.6%	0.2%	-2.9%	-0.7%
Horticulture	920	2.7%	1.4%	-2.6%	-0.1%
Forestry and Logging	152	0.5%	0.2%	-2.7%	0.3%
Wood manufacturing	773	2.3%	1.4%	-2.0%	-2.3%
Health Care and Social Assistance	4,000	11.9%	9.3%	2.9%	3.3%

SKILLS PIPELINE

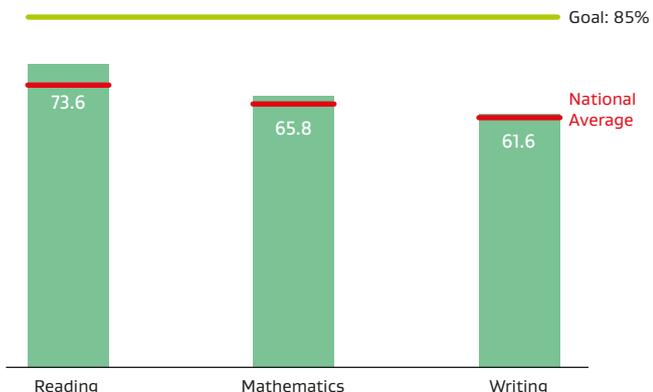
PERCENTAGE OF PRIMARY STUDENTS AT OR ABOVE NATIONAL STANDARDS, 2013



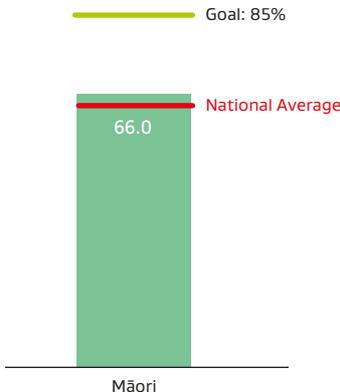
PERCENTAGE OF 18 YEAR OLDS WITH NCEA LEVEL 2 OR EQUIVALENT, 2013



PERCENTAGE OF MĀORI STUDENTS AT OR ABOVE NATIONAL STANDARDS, 2013

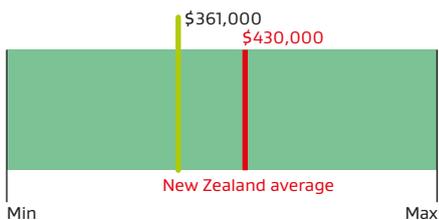


PERCENTAGE OF MĀORI 18 YEAR OLDS WITH NCEA LEVEL 2 OR EQUIVALENT, 2013



LIVING STANDARDS

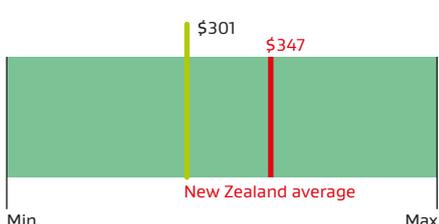
AVERAGE HOUSE PRICE, NELSON, 2014



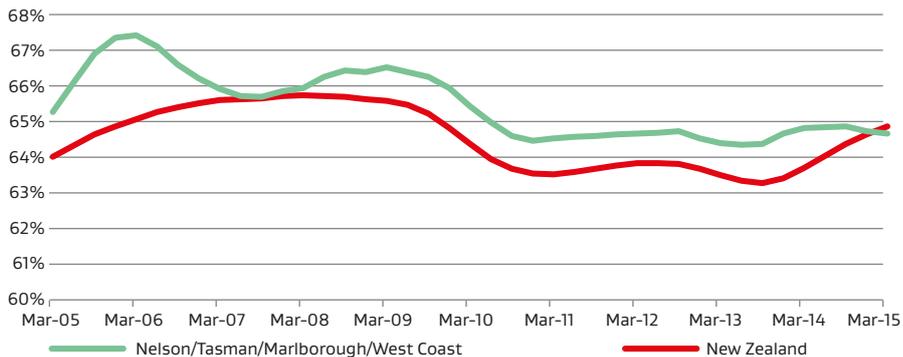
AVERAGE HOUSEHOLD INCOME, NELSON, 2014



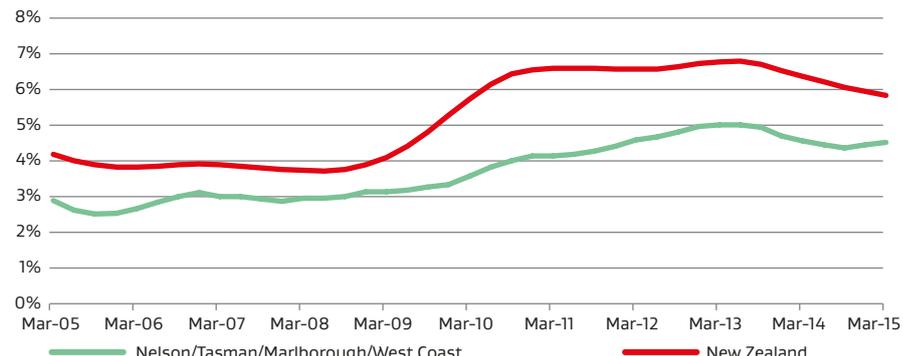
AVERAGE HOUSEHOLD WEEKLY RENT, NELSON, 2014



ANNUAL AVERAGE EMPLOYMENT RATES, 2005–2015



ANNUAL AVERAGE UNEMPLOYMENT RATES, 2005–2015



83.2 per cent of 18 year olds have at least NCEA Level 2, the second-highest proportion in New Zealand. This solid rate of high school achievement is not yet reflected in the workforce: 34.4 per cent of 25–34 year olds have level 4 qualifications or higher, compared with 54.2 per cent for all of New Zealand.

Outlook

Nelson's ageing workforce will put pressure on the economy, and employment in the region is growing slower than other parts of the country. The primary sector has a notably older population than the national average. This, as well as education to employment alignment and business

succession, have been identified in the region's economic development plan as key economic issues facing Nelson in the future.

Opportunities for tourism exist with further development of the cruise ship market, Nelson's promotion as a premier food and beverage region, and cultural tourism. Nelson also has opportunities to build on its existing strengths, with further development of aquaculture and fisheries; and food and beverage manufacturing.

PEOPLE		Nelson	NZ	% of NZ
Population		49,300	4,509,700	1.1%
Share of population (%): 0–14 years		18.6	20.2	
	15–24 years	11.4	14.2	
	25–64 years	52.1	51.2	
	65 years+	17.9	14.4	
Māori share of population (%)		9.0	14.1	
Net annual international migration		391	58,259	
Projected population growth 2013–2043, annual average		0.5	0.8	
Dependency ratio	2014	57.5	53	
	2043	91.1	68.3	
LIVING STANDARDS		Nelson	NZ	% of NZ
Regional GDP (\$m)		4,180*	229,718	1.8%
GDP per capita (\$)		42,695*	51,319	
Mean household income		83,500	89,000	
Median house price		361,000	430,000	
Mean weekly rent		301	347	
SKILLS & JOBS		Nelson	NZ	% of NZ
Total employment		33,619	2,504,814	1.3%
Employment rate		60.4	65.2	
Unemployment rate		5.1	5.7	
Labour force participation rate		63.7	69.1	
% of 18 year olds obtaining minimum NCEA Level 2		83.2	78.6	
NEET rate		10.1*	11.4	
% of 25–34 year olds with level 4 qualifications or higher		34.4	54.2	
Skilled and highly skilled jobs as a share of total employment		52.2	58.6	

* Combined figure for Nelson/Tasman/Marlborough/West Coast



Business Growth Agenda actions relevant to Nelson

Improved trade access for exporters with Korean FTA and Trans-Pacific Partnership

Extend the Ultra-Fast Broadband network to smaller towns

Lift rural broadband speeds with the Rural Broadband Initiative

Regional roading upgrades

Education New Zealand Regional Partnership programme to grow international education

Tourism Growth Partnership Fund to grow Tourism Infrastructure

Complete Nga Haerenga – The New Zealand Cycle Trail

Attract new Investment & jobs with the Regional Investment Attraction Programme

Relaunch the Regional Business Partners Programme for Nelson SMEs

Build Regional Business Hubs

Regional Research Institutes Programme

Strengthen Callaghan Innovation's regional footprint

Primary Growth Partnerships R & D Programme

Encourage Water Storage Projects with the Irrigation Acceleration Fund & Crown Irrigation

Unlock the productivity of Maori-owned land

Resource Management Reforms to speed up decision-making

Increase supply of affordable housing through Housing Accords and Special Housing Areas

Increase social housing provision through community providers

Māori and Pasifika Trades Training

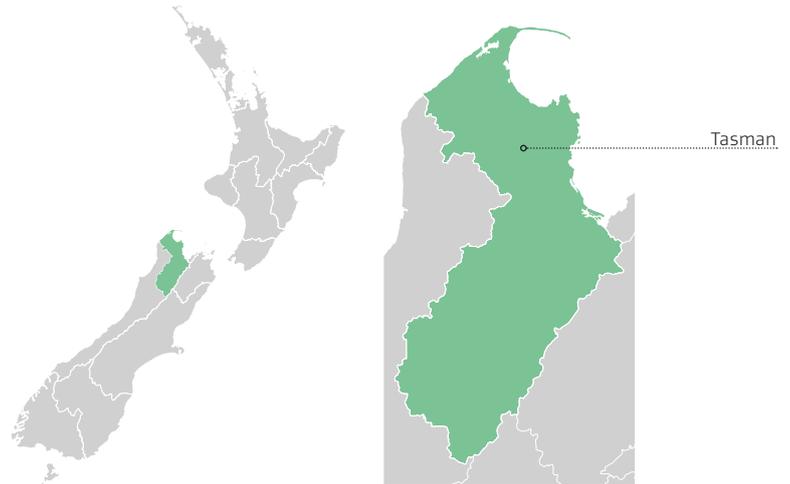
Encourage vocation training with NZ Apprenticeships programme and trades academies

Boost Regional skilled migration and South Island immigration opportunities



Tasman

Tasman is the most rural of New Zealand’s regions. It is closely linked to the more urban Nelson region. Much of its economy is based around the primary production sector, which accounts for about a quarter of the region’s total employment. The region has 1.1 per cent of New Zealand’s population.



Economy

Around 12.9 per cent of Tasman’s employment is in horticulture, compared to 1.4 per cent in the rest of the country. The region’s horticulture sector is supported by a warm, sunny climate; fertile soils; an international port; a close working relationship with local science and research organisations; and the ability to employ workers through the Registered Employment Scheme. Many of the region’s horticultural products are exported as, or for use in, natural health products.

Tasman farms are generally small family-owned operations, with a 2012 cluster analysis showing that farming had the largest number of business units and the least number of employees of the main regional clusters. Although dairy farming in the region is relatively small compared to other South Island regions, the contribution it makes within the region is significant.

Fruit and tree nut growing employed 2,400 people in Tasman in 2014, 11.1 per cent of all employment in the region. Pipfruit has national significance, as in 2012, producers in the Tasman region accounted for 32.1 per cent of national pipfruit employment, 26.4 per cent of national

pipfruit GDP and 23.8 per cent of national pipfruit businesses. Tasman is New Zealand’s largest pear growing region and the largest producing region of boysenberries in the world. Tasman is the southernmost region that regrows kiwifruit commercially in New Zealand, and the region remains free of the PSA-V disease. It is one of the two main regions in New Zealand for growing blackcurrants.

The Tasman region is home to a mature, but innovative forest industry that made a GDP contribution to the regional economy in 2012 similar to that of horticulture (both about \$430 million). Business units and employment in the forestry industry have slowly contracted as consolidation and mechanisation has occurred.

Natural Resources

Tasman, with a population of 49,100, covers a diverse land area of 9,786 km. It contains large mountainous areas, beaches, bush and forests. Three national parks are in the region- Abel Tasman, Kahurangi, and Nelson Lakes- making it a popular eco-tourism and adventure tourism location. Tasman’s good soil and favourable climate offer a fertile growing environment.

* Combined figure for Nelson/Tasman/Marlborough/West Coast

EMPLOYMENT BY INDUSTRY

EMPLOYMENT GROWTH AND CONCENTRATION COMPARED TO THE NATIONAL AVERAGE



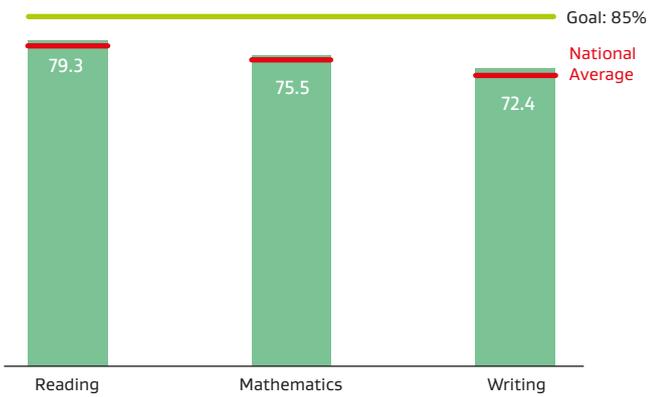
NOTE: Location Quotient is the proportion of total employment in a given industry and region, divided by the proportion in that industry at a national level

AREAS OF REGIONAL STRENGTH

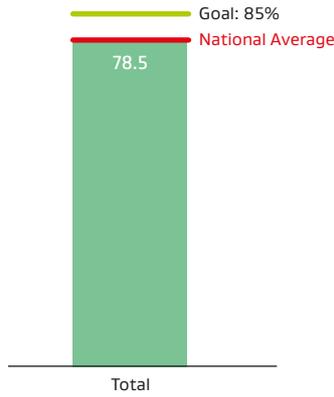
INDUSTRY	SHARE OF TOTAL EMPLOYMENT			EMPLOYMENT GROWTH 2005-2015, ANNUAL AVERAGE	
	EMPLOYMENT COUNT	TASMAN	NZ	TASMAN	NZ
Horticulture	2,715	12.9%	1.4%	1.6%	-0.1%
Forestry and Logging	260	1.2%	0.2%	-1.5%	0.3%
Fishing	170	0.8%	0.2%	-2.6%	-0.7%
Food manufacturing	1,275	6.0%	3.5%	1.8%	0.4%
Other agriculture	575	2.7%	1.8%	-0.2%	1.4%

SKILLS PIPELINE

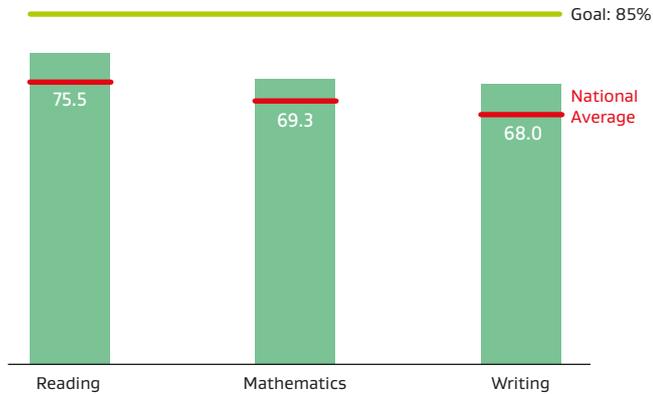
PERCENTAGE OF PRIMARY STUDENTS AT OR ABOVE NATIONAL STANDARDS, 2013



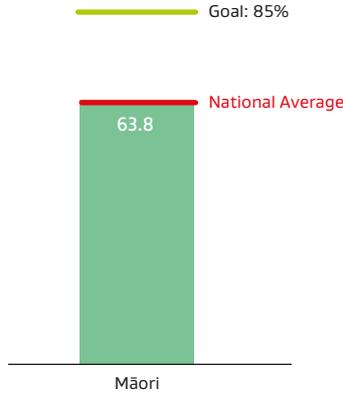
PERCENTAGE OF 18 YEAR OLDS WITH NCEA LEVEL 2 OR EQUIVALENT, 2013



PERCENTAGE OF MĀORI STUDENTS AT OR ABOVE NATIONAL STANDARDS, 2013



PERCENTAGE OF MĀORI 18 YEAR OLDS WITH NCEA LEVEL 2 OR EQUIVALENT, 2013



LIVING STANDARDS

AVERAGE HOUSE PRICE, TASMAN, 2014



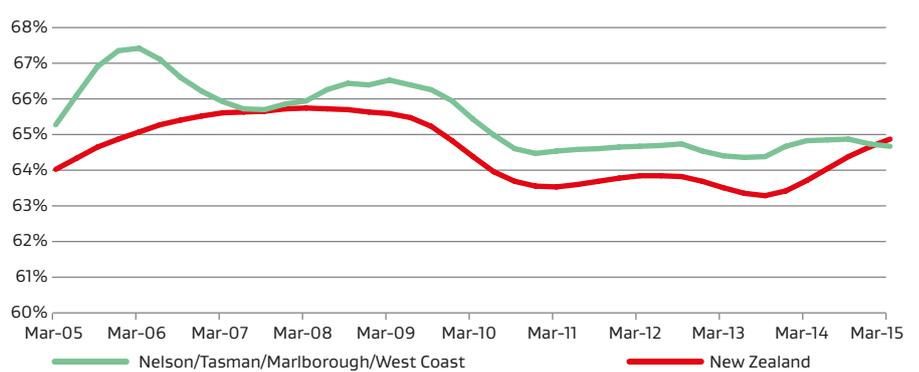
AVERAGE HOUSEHOLD INCOME, TASMAN, 2014



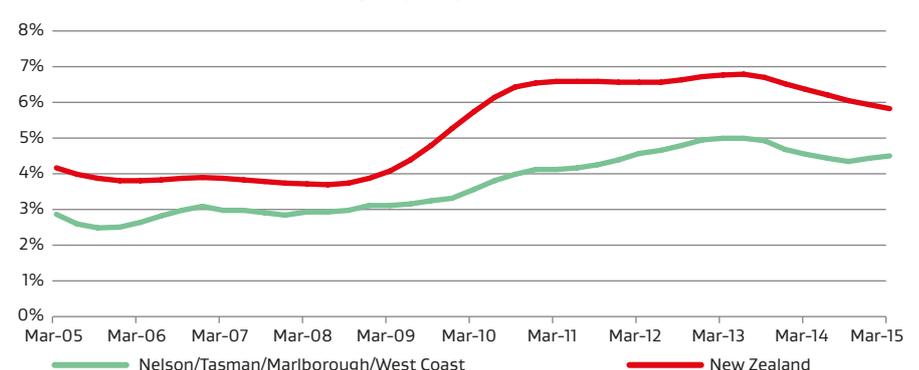
AVERAGE HOUSEHOLD WEEKLY RENT, TASMAN, 2014



ANNUAL AVERAGE EMPLOYMENT RATES, 2005-2015



ANNUAL AVERAGE UNEMPLOYMENT RATES, 2005-2015



Living Standards and Jobs

Tasman's mean household income of \$82,300 is below the national average of \$89,000. The region has a high proportion of seasonal workers and an older population. Tasman has a relatively highly-qualified workforce: 55.1 per cent of 25–34 year olds have a level 4 qualification or higher, compared with 54.2 per cent for New Zealand as a whole.

Outlook

Tasman has a number of opportunities to grow: increasing the productivity of agricultural land; improvements to infrastructure; and better linking of education to career paths in the region.

Opportunities for tourism exist with further development of the cruise ship market, Tasman's promotion as a premier food and beverage region, cultural tourism, and conservation land

activities. The challenge is for the region to better respond to visitor needs and address the issues around seasonality of tourism and the availability of event venues.

The region is also fast becoming known for its cycle ways and mountain biking. The opening of both the Heaphy Track during winter and the Old Ghost Road in the Buller Gorge may put the region on an international biking circuit and attract more visitors in winter.

PEOPLE		Tasman	NZ	% of NZ
Population		49,100	4,509,700	1.1%
Share of population (%): 0–14 years		19.6	20.2	
	15–24 years	10.4	14.2	
	25–64 years	51.3	51.2	
	65 years+	18.7	14.4	
Māori share of population (%)		7.3	14.1	
Net annual international migration		111	58,259	
Projected population growth 2013–2043, annual average		0.3	0.8	
Dependency ratio	2014	62.1	53	
	2043	111.4	68.3	
LIVING STANDARDS		Tasman	NZ	% of NZ
Regional GDP (\$m)		4,180*	229,718	1.8%
GDP per capita (\$)		42,695*	51,319	
Mean household income		82,300	89,000	
Median house price		395,000	430,000	
Mean weekly rent		317	347	
SKILLS & JOBS		Tasman	NZ	% of NZ
Total employment		21,115	2,504,814	0.8%
Employment rate		68.6	65.2	
Unemployment rate		4.6**	5.7	
Labour force participation rate		71.4	69.1	
% of 18 year olds obtaining minimum NCEA Level 2		78.5	78.6	
NEET rate		10.1***	11.4	
% of 25–34 year olds with level 4 qualifications or higher		55.1	54.2	
Skilled and highly skilled jobs as a share of total employment		57.1	58.6	

* Combined figure for Nelson/Tasman

** Combined figure for Nelson/Tasman/Marlborough/West Coast

*** Combined figure for Nelson/Tasman/Marlborough/West Coast

Business Growth Agenda actions relevant to Tasman

Improved trade access for exporters with Korean FTA and Trans-Pacific Partnership

Extend the Ultra-Fast Broadband network to smaller towns

Lift rural broadband speeds with the Rural Broadband Initiative

Regional roading upgrades

Tourism Growth Partnership Fund to grow Tourism Infrastructure

Complete Nga Haerenga – The New Zealand Cycle Trail

Attract new Investment & jobs with the Regional Investment Attraction Programme

Relaunch the Regional Business Partners Programme for Tasman SMEs

Build Regional Business Hubs

Regional Research Institutes Programme

Strengthen Callaghan Innovation's regional footprint

Primary Growth Partnerships R & D Programme

Encourage Water Storage Projects with the Irrigation Acceleration Fund & Crown Irrigation

Unlock the productivity of Maori-owned land

Resource Management Reforms to speed up decision-making

Increase supply of affordable housing through Housing Accords and Special Housing Areas

Increase social housing provision through community providers

Māori and Pasifika Trades Training

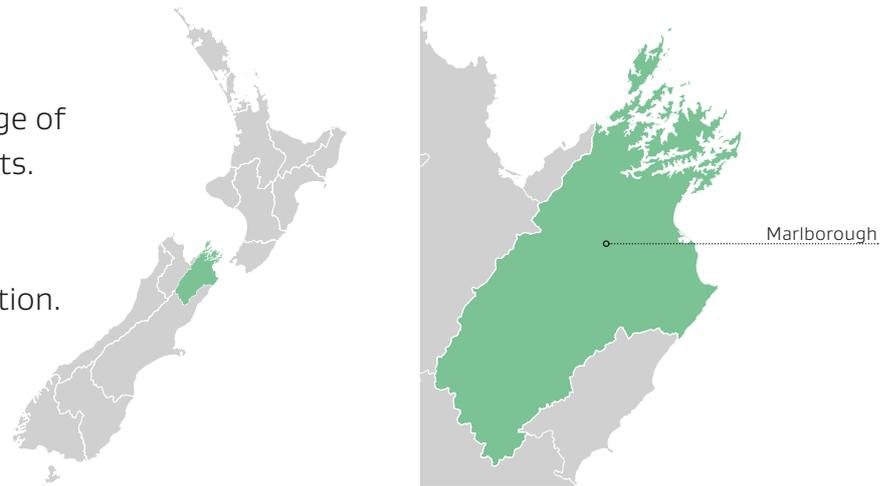
Encourage vocation training with NZ Apprenticeships programme and trades academies

Boost Regional skilled migration and South Island immigration opportunities



Marlborough

Marlborough has a small export-focused economy producing a range of primary and manufactured products. In 2014 Marlborough contributed 1.0 per cent to national GDP with 1.0 per cent of the national population.



Economy

Marlborough’s industrial specialisation reflects its natural resources. 5.8 per cent of the region’s employment is in horticulture, compared to 1.4 per cent for the rest of New Zealand; and 1.3 per cent is in fishing and aquaculture (compared with 0.2 per cent for the rest of the country).

Marlborough has seen employment in agriculture and fishing support services almost triple in the past decade. Growth has also been strong for administrative and support services, food and beverage manufacturing, and horticulture. The region has specialisations in some niche areas, such as aviation manufacturing and wood product manufacturing.

From 2009 to 2014, Marlborough’s GDP increased by 16.0 per cent (below the national movement of 22.4 per cent). Growth was driven by manufacturing, and rental, hiring and real estate services. More recent growth has been driven by primary industries. Marlborough was the fourth-largest contributor to the horticulture and fruit-growing industry, and the third-largest contributor to the food, beverage and tobacco product manufacturing industry. This is due to

the volume of grapes grown and wine produced in the region.

Natural Resources

Marlborough has plentiful natural resources, making it an attractive base for a diverse range of business opportunities. In particular, the stony soils of the Wairau river valley and the temperate weather have enabled the region to become the centre of the New Zealand’s wine industry. More than 60 per cent of New Zealand’s total vineyards are planted in the region, and the wine produced in Marlborough is very well-regarded internationally.

Marlborough’s extensive coastline (one-fifth of New Zealand’s total coastline) provides an ideal environment for aquaculture as well as nature and marine-based tourism.

Living Standards and Jobs

Marlborough has an above average proportion of 18 year olds attaining NCEA Level 2 and a below average NEET rate. Despite this, the proportion of 25–34 year olds with level 4 qualifications is below the national average (46.6 per cent compared with 54.2 per cent), as is the percentage of employees in skilled and highly skilled

EMPLOYMENT BY INDUSTRY

EMPLOYMENT GROWTH AND CONCENTRATION COMPARED TO THE NATIONAL AVERAGE



NOTE: Location Quotient is the proportion of total employment in a given industry and region, divided by the proportion in that industry at a national level

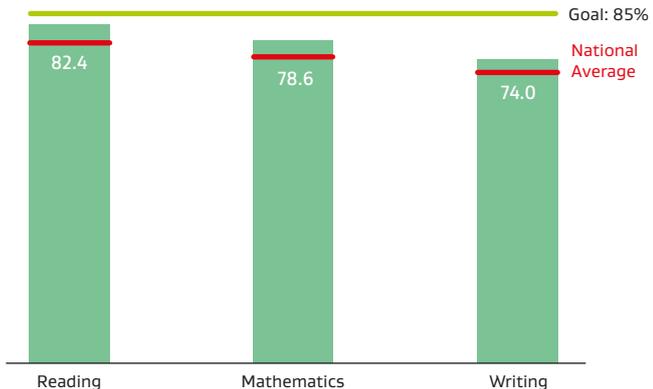
AREAS OF REGIONAL STRENGTH

INDUSTRY	SHARE OF TOTAL EMPLOYMENT			EMPLOYMENT GROWTH 2005–2015, ANNUAL AVERAGE	
	EMPLOYMENT COUNT	MARLBOROUGH	NZ	MARLBOROUGH	NZ
Fishing	433	1.3%	0.2%	1.9%	-0.7%
Other agriculture	3,163	9.5%	1.8%	6.3%	1.4%
Horticulture	1,927	5.8%	1.4%	1.2%	-0.1%
Food manufacturing	3,300	9.9%	3.5%	3.2%	0.4%
Forestry and Logging	211	0.6%	0.2%	1.0%	0.3%

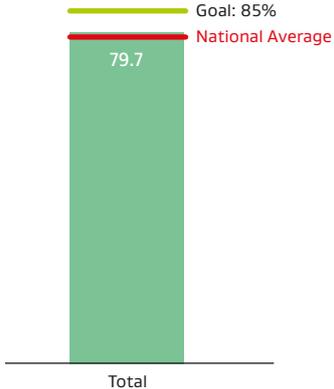
MARLBOROUGH

SKILLS PIPELINE

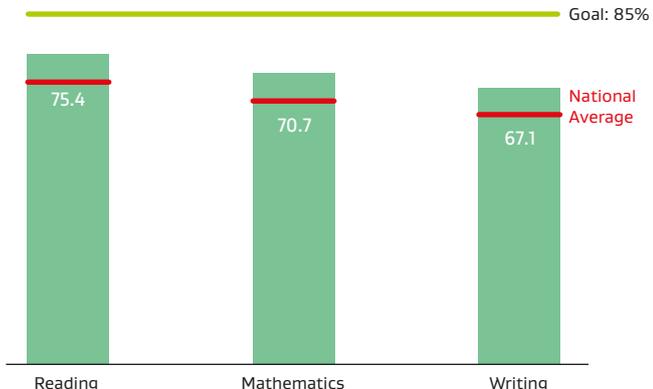
PERCENTAGE OF PRIMARY STUDENTS AT OR ABOVE NATIONAL STANDARDS, 2013



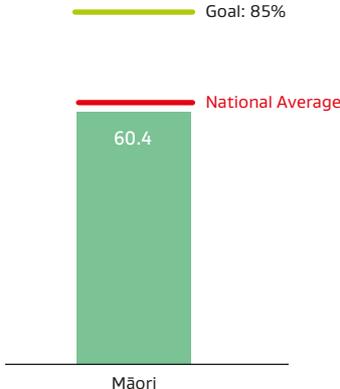
PERCENTAGE OF 18 YEAR OLDS WITH NCEA LEVEL 2 OR EQUIVALENT, 2013



PERCENTAGE OF MĀORI STUDENTS AT OR ABOVE NATIONAL STANDARDS, 2013

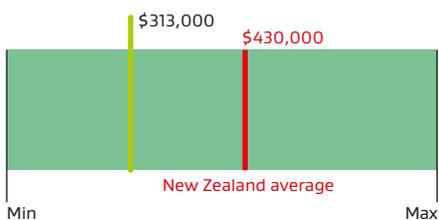


PERCENTAGE OF MĀORI 18 YEAR OLDS WITH NCEA LEVEL 2 OR EQUIVALENT, 2013

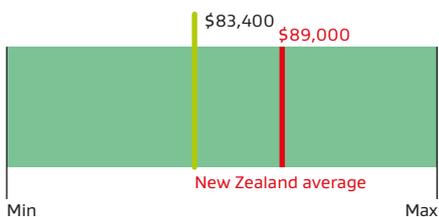


LIVING STANDARDS

AVERAGE HOUSE PRICE, MARLBOROUGH, 2014



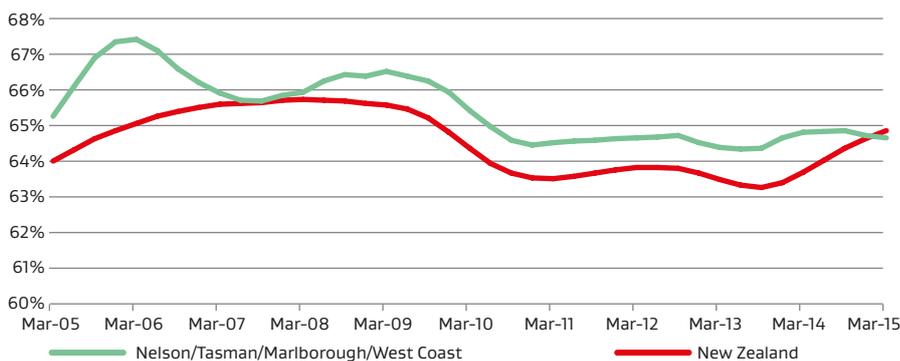
AVERAGE HOUSEHOLD INCOME, MARLBOROUGH, 2014



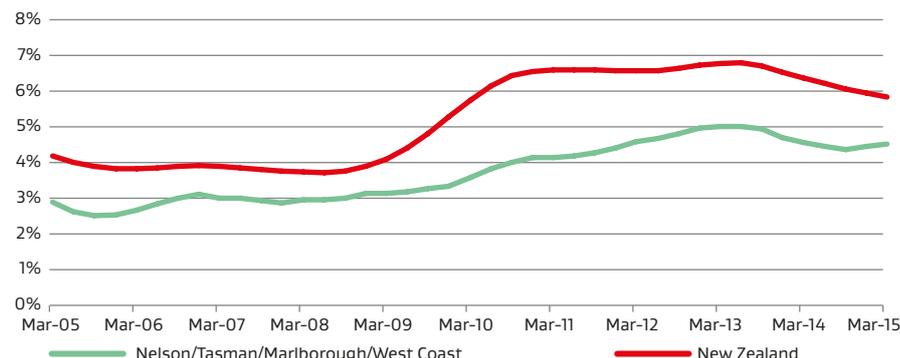
AVERAGE HOUSEHOLD WEEKLY RENT, MARLBOROUGH, 2014



ANNUAL AVERAGE EMPLOYMENT RATES, 2005-2015



ANNUAL AVERAGE UNEMPLOYMENT RATES, 2005-2015



employment (52.1 per cent compared to 58.6 per cent).

Marlborough has one of the oldest population's in the country. 20.9 per cent of the population is over the age of 65 (the highest proportion of all New Zealand regions), and 28 per cent are under the age of 25 (the lowest proportion in the country).

The region has a mean household income of \$83,400, slightly below the national average of \$89,000. Employment opportunities are growing faster than the population, resulting in high employment rates.

Outlook

There are opportunities for Marlborough to develop more added-value products in the agriculture and forestry sectors, and further diversify into services that support these sectors. Other growth areas include tourism, where there is potential to increase international visitor numbers and spend per visitor, and aquaculture, where significant international export opportunities lie.

With the purchase of Safe Air by Airbus, there are significant opportunities to expand the aviation industry in the region. There is scope to increase

primary sector productivity and add more value to products through consolidation and co-operation across small-scale enterprises, introducing new fruit varieties, adding more value to forestry products, diversifying pastoral land into higher-yielding production, and growing the aquaculture and natural health sectors.

PEOPLE		Marlborough	NZ	% of NZ
Population		44,800	4,509,700	1.0%
Share of population (%): 0–14 years		18.0	20.2	
15–24 years		10.0	14.2	
25–64 years		51.2	51.2	
65 years+		20.9	14.4	
Māori share of population (%)		11.0	14.1	
Net annual international migration		179	58,259	
Projected population growth 2013–2043, annual average		0.2	0.8	
Dependency ratio	2014	63.6	53	
	2043	98.1	68.3	

LIVING STANDARDS		Marlborough	NZ	% of NZ
Regional GDP (\$m)		2,282	229,718	1.0%
GDP per capita (\$)		51,051	51,319	
Mean household income		83,400	89,000	
Median house price		313,000	430,000	
Mean weekly rent		282	347	

SKILLS & JOBS		Marlborough	NZ	% of NZ
Total employment		33,469	2,504,814	1.3%
Employment rate		66.5	65.2	
Unemployment rate		5.0	5.7	
Labour force participation rate		70.0	69.1	
% of 18 year olds obtaining minimum NCEA Level 2		79.7	78.6	
NEET rate		10.1*	11.4	
% of 25–34 year olds with level 4 qualifications or higher		46.6	54.2	
Skilled and highly skilled jobs as a share of total employment		52.1	58.6	

* Combined figure for Nelson/Tasman/Marlborough/West Coast

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Māori and Pasifika Trades Training

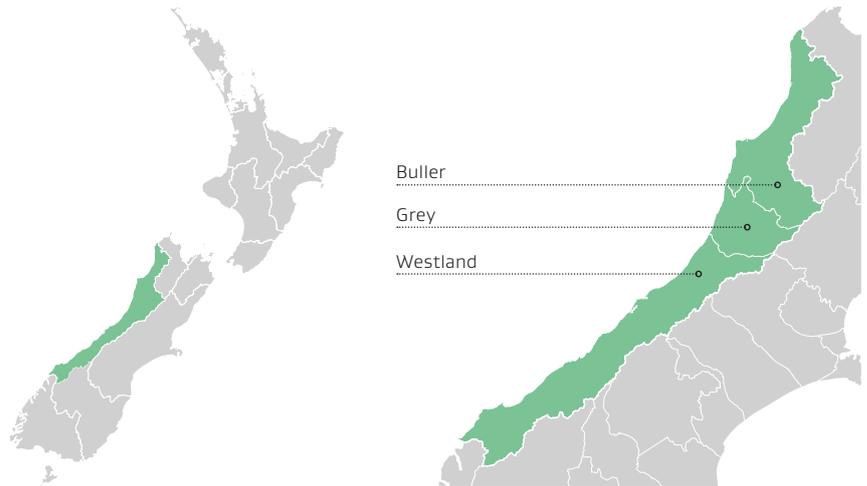
Encourage vocation training with NZ Apprenticeships programme and trades academies

Boost Regional skilled migration and South Island immigration opportunities



West Coast

The West Coast is New Zealand's most sparsely populated region with a population of 32,800 spread over 23,000 square kilometres. In 2014, the West Coast made up 0.7 of New Zealand's GDP and 0.7 of population.



Economy

Traditionally, the West Coast's rich natural asset base has underpinned its main industries. The region's main comparative advantage is mining, which accounts for 5.8 per cent of total employment, compared to 0.3 per cent for the rest of New Zealand. Mining has also been a fast-growing industry for the West Coast, with employment more than tripling between 2002 and 2012. More recently, the mining sector has been hit by a severe downturn in world commodity prices.

Buller District has the strongest reliance on mining, accounting for 10 per cent of the district's employment. The district has seen strong employment growth in professional, scientific and technical services (mostly architectural and engineering services), and in the construction industry. Grey District also has a large share of employment in mining (5.1 per cent), and has seen employment growth in administrative and support services (mainly employment services), and construction.

Farther down the coast, Westland District has a strong dairy farming and tourism sector in addition to relative strengths in mining and forestry and logging. The district has seen

increasing diversity in its employment structure over the past decade, with above average growth in the manufacturing sector (primarily dairy processing) and services that support the district's tourism industry (such as accommodation and food services).

Māori make up 9.9 per cent of the West Coast's population, well below the national average of 14.1 per cent. However, Māori are important contributors to the West Coast's economy. Mawhera Incorporation is an important land owner in the region, and Ngāi Tahu, the dominant iwi in the region, has customary ownership of the region's valuable pounamu resource. Ngāi Tahu own and operate a number of tourism businesses on the West Coast.

Natural Resources

Eighty-five per cent of land on the West Coast is managed by the Department of Conservation as national parks and reserves – the highest proportion of all New Zealand's regions. The region's natural assets and conservation lands provide a strong basis for tourism, with the region an internationally-known eco-tourism destination.

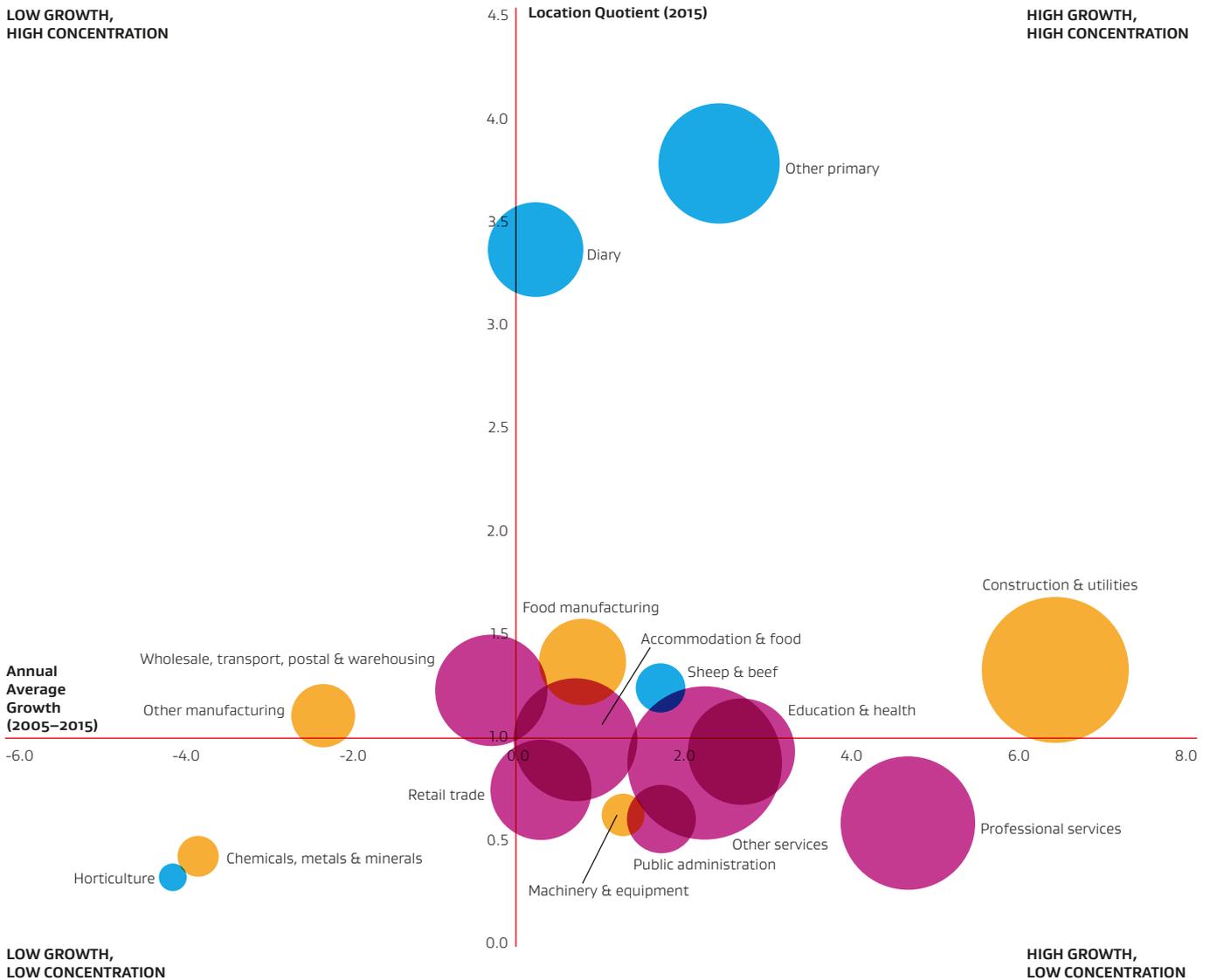
The West Coast also has substantial mineral resources, including coal, gold, tungsten, pounamu and garnets.

* Combined figure for Nelson/Tasman/Marlborough/West Coast

EMPLOYMENT BY INDUSTRY

EMPLOYMENT GROWTH AND CONCENTRATION COMPARED TO THE NATIONAL AVERAGE

LOW GROWTH,
HIGH CONCENTRATION



LOW GROWTH,
LOW CONCENTRATION

HIGH GROWTH,
LOW CONCENTRATION

NOTE: Location Quotient is the proportion of total employment in a given industry and region, divided by the proportion in that industry at a national level

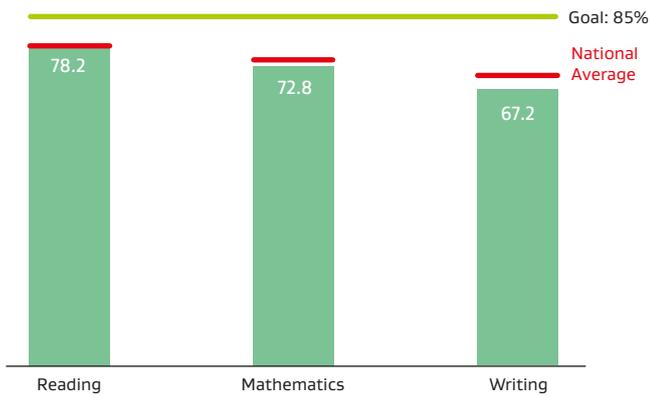
AREAS OF REGIONAL STRENGTH

INDUSTRY	SHARE OF TOTAL EMPLOYMENT			EMPLOYMENT GROWTH 2005-2015, ANNUAL AVERAGE	
	EMPLOYMENT COUNT	WEST COAST	NZ	WEST COAST	NZ
Mining	1,112	5.8%	0.3%	5.8%	3.8%
Dairy Cattle Farming	1,078	5.7%	1.7%	0.2%	1.0%
Fishing	104	0.5%	0.2%	-3.2%	-0.7%
Forestry and Logging	131	0.7%	0.2%	-6.6%	0.3%
Arts and Recreation Services	523	2.7%	2.0%	5.1%	3.7%

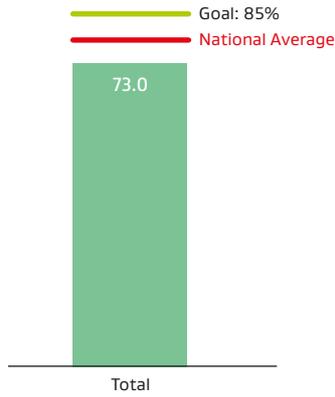
WEST COAST

SKILLS PIPELINE

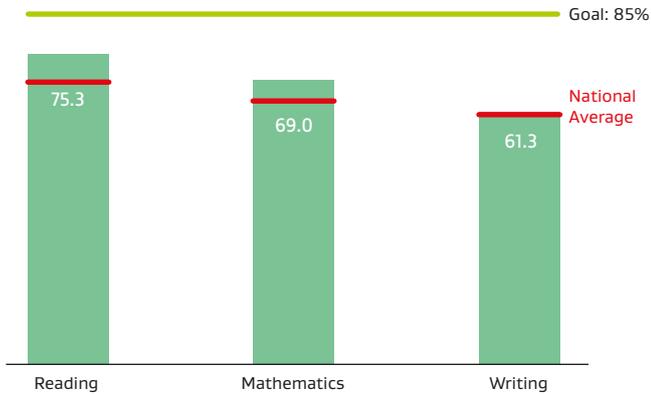
PERCENTAGE OF PRIMARY STUDENTS AT OR ABOVE NATIONAL STANDARDS, 2013



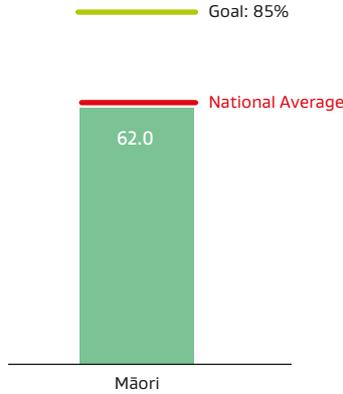
PERCENTAGE OF 18 YEAR OLDS WITH NCEA LEVEL 2 OR EQUIVALENT, 2013



PERCENTAGE OF MĀORI STUDENTS AT OR ABOVE NATIONAL STANDARDS, 2013

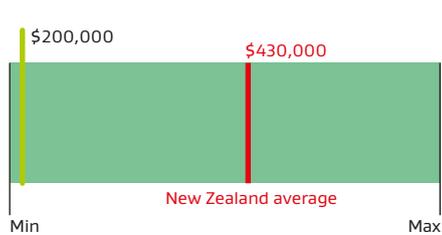


PERCENTAGE OF MĀORI 18 YEAR OLDS WITH NCEA LEVEL 2 OR EQUIVALENT, 2013



LIVING STANDARDS

AVERAGE HOUSE PRICE, WEST COAST, 2014



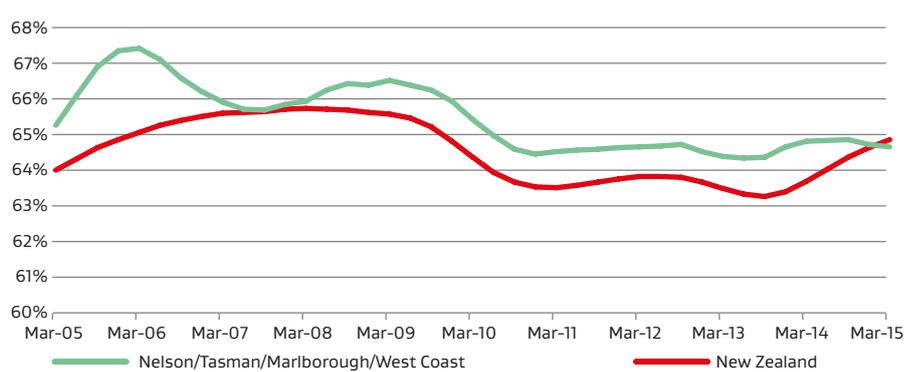
AVERAGE HOUSEHOLD INCOME, WEST COAST, 2014



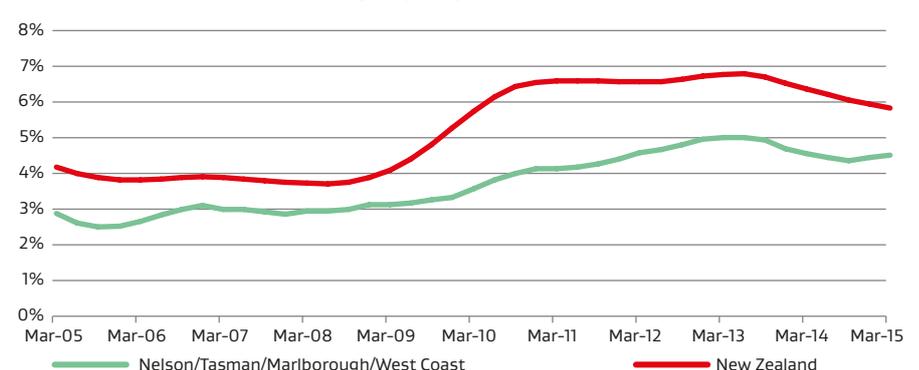
AVERAGE HOUSEHOLD WEEKLY RENT, WEST COAST, 2014



ANNUAL AVERAGE EMPLOYMENT RATES, 2005–2015



ANNUAL AVERAGE UNEMPLOYMENT RATES, 2005–2015



Nearly all of New Zealand's bituminous coal (a high-quality coal used in the manufacture of cement and steel) is found in the region, and smaller-scale alluvial gold mining is also undertaken in the region.

Living Standards and Jobs

West Coast incomes tend to be below the national average, but they are accompanied by the second-lowest housing costs in the country (only Southland is less expensive). A total of 54.9 per cent of employment is in skilled or highly-skilled occupations, compared to 58.6 per cent across New Zealand. While this figure has been increasing in

recent years, it remains low by national standards. Improved collaboration between the region's secondary schools, Tai Poutini Polytechnic and the West Coast Trades Academy is addressing this.

Outlook

Economic development opportunities for the West Coast region rest on further developing and leveraging its natural resources and existing strengths to develop and attract higher value-added businesses. Building the skills of its young people should also be a priority for the region, to ensure that the human resources are available for

businesses to grow and diversify. This is being led by Tai Poutini Polytechnic which is working closely with industry and business to provide courses which meet their current and future skill needs.

The West Coast acknowledges the need to look for new opportunities to diversify the region's economy and increase its resilience to commodity price fluctuations. The West Coast Councils, together with Development West Coast, are implementing action plans to generate economic development opportunities in the region.

PEOPLE		West Coast	NZ	% of NZ
Population		32,800	4,509,700	0.7%
Share of population (%): 0–14 years		18.8	20.2	
15–24 years		10.9	14.2	
25–64 years		53.4	51.2	
65 years+		16.8	14.4	
Māori share of population (%)		9.9	14.1	
Net annual international migration		92	58,259	
Projected population growth 2013–2043, annual average		0.0	0.8	
Dependency ratio	2014	55.3	53	
	2043	87.6	68.3	

LIVING STANDARDS		West Coast	NZ	% of NZ
Regional GDP (\$m)		1,721	229,718	0.7%
GDP per capita (\$)		52,306	51,319	
Mean household income		82,300	89,000	
Median house price		200,000	430,000	
Mean weekly rent		243	347	

SKILLS & JOBS		West Coast	NZ	% of NZ
Total employment		19,046	2,504,814	0.8%
Employment rate		66.7	65.2	
Unemployment rate		4.6*	5.7	
Labour force participation rate		68.9	69.1	
% of 18 year olds obtaining minimum NCEA Level 2		73.0	78.6	
NEET rate		10.1**	11.4	
% of 25–34 year olds with level 4 qualifications or higher		N/A	54.2	
Skilled and highly skilled jobs as a share of total employment		54.9	58.6	

* Combined figure for Nelson/Tasman/Marlborough/West Coast

** Combined figure for Nelson/Tasman/Marlborough/West Coast

Business Growth Agenda actions relevant to West Coast

Improved trade access for exporters with Korean FTA and Trans-Pacific Partnership

Extend the Ultra-Fast Broadband network to smaller towns

Lift rural broadband speeds with the Rural Broadband Initiative

Build replacement Taramakau Bridge & other regional roading upgrades

Education New Zealand Regional Partnership programme to grow international education

Tourism Growth Partnership Fund to grow Tourism Infrastructure

Complete Nga Haerenga – The New Zealand Cycle Trail

Attract new Investment & jobs with the Regional Investment Attraction Programme

Relaunch the Regional Business Partners Programme for West Coast SMEs

Build Regional Business Hubs

Regional Research Institutes Programme

Strengthen Callaghan Innovation's regional footprint

Primary Growth Partnerships R & D Programme

Unlock the productivity of Māori-owned land

Resource Management Reforms to speed up decision-making

Increase social housing provision through community providers

Māori and Pasifika Trades Training

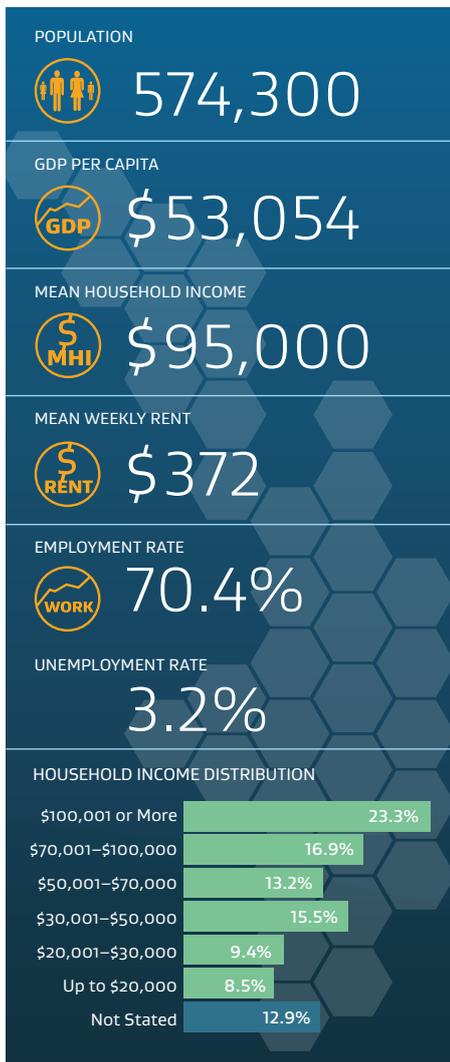
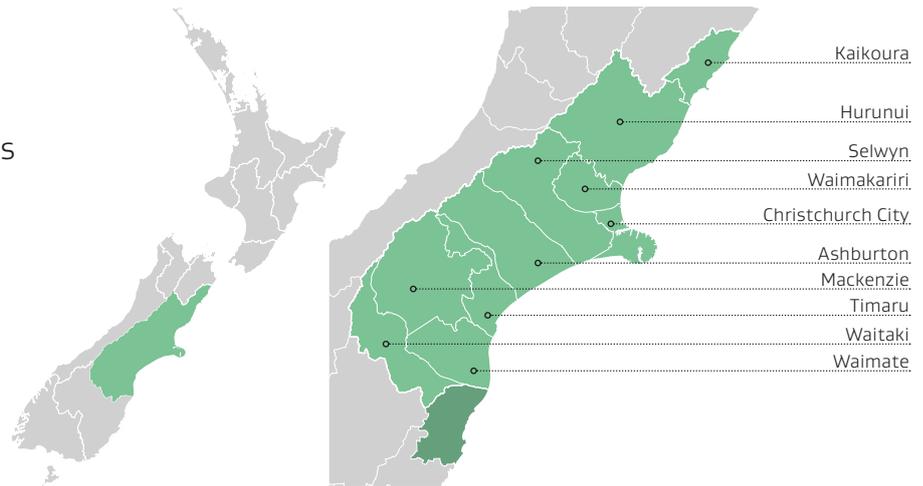
Encourage vocation training with NZ Apprenticeships programme and trades academies

Boost Regional skilled migration and South Island immigration opportunities



Canterbury

Canterbury is New Zealand’s largest region by land area, and, with 574,300, the most populous in the South Island. The region produces 13.1 per cent of New Zealand’s GDP, and has 12.7 per cent of the country’s population.



Economy

Key sectors for the Canterbury economy are agriculture (dairy and sheep, beef cattle and grain farming) and manufacturing (transport and machinery equipment, and food and beverage). Christchurch is the manufacturing hub of the region, with particular strengths in machinery and equipment manufacturing and chemical, minerals and metal manufacturing. Following the 2010 and 2011 earthquakes, the construction industry has shown rapid growth, as workers moved in to rebuild the city. The increase in construction employment in Christchurch was also seen in the neighbouring districts of Waimakariri and Selwyn.

Outside Christchurch, primary industries dominate, with the diversity of landscapes influencing the particular type of production. Mixed livestock, dairying and cropping are the main types of farming on the plains. Reflecting its position near the Hikurangi Trench, with its abundant marine life, Kaikōura district has a strong fishing industry: 2.0 per cent of employment is in this industry, the highest of any New Zealand district. The marine life, particularly whales, also act as tourist attractions, and Kaikōura district has an above average

concentration of employment in tourism-facing industries such as accommodation and food services.

Dairy farming experienced strong growth between 2007 and 2014. It also had the greatest increase in revealed comparative advantage (or concentration of employment above the national average) in Canterbury over the last decade, reflecting the rapid conversion of land to dairy farming. Canterbury has 17.3 per cent of the nation’s cows, behind only Waikato (24 per cent). Dairy cow numbers in Canterbury are continuing to increase faster than anywhere else in the country, driven by good financial returns and the availability of irrigation and supplementary feed. New nutrient management requirements, aimed at improving water quality, are expected to impact on the rate of growth and the way in which farms operate.

Natural Resources

Canterbury is New Zealand’s largest region, covering 45,000 square kilometres. The region is well suited for agricultural production, with its extensive, fertile plains, including 21 per cent of New Zealand’s highest quality soils. The region is New Zealand’s main producer of cereal crops, such as wheat, barley and

EMPLOYMENT BY INDUSTRY

EMPLOYMENT GROWTH AND CONCENTRATION COMPARED TO THE NATIONAL AVERAGE



NOTE: Location Quotient is the proportion of total employment in a given industry and region, divided by the proportion in that industry at a national level

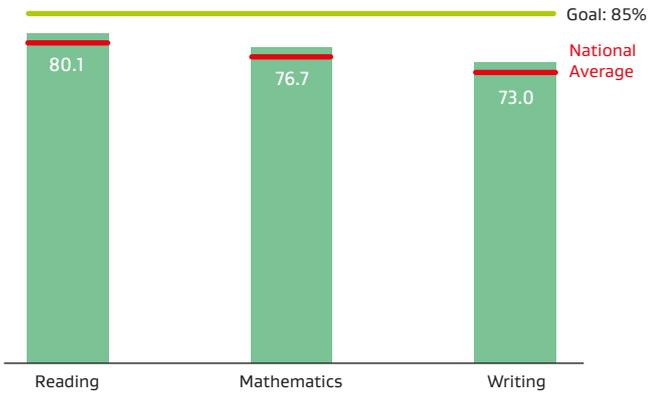
AREAS OF REGIONAL STRENGTH

INDUSTRY	SHARE OF TOTAL EMPLOYMENT			EMPLOYMENT GROWTH 2005-2015, ANNUAL AVERAGE	
	EMPLOYMENT COUNT	CANTERBURY	NZ	CANTERBURY	NZ
Construction	44,748	13.1%	9.3%	8.2%	3.7%
Grain, Sheep and Beef Cattle Farming	5,885	1.7%	1.2%	-2.0%	-2.1%
Machinery and equipment manufacturing	8,620	2.5%	1.8%	-0.8%	-0.6%
Other manufacturing	3,796	1.1%	0.9%	-6.3%	-4.7%
Electricity, Gas, Water and Waste Services	3,073	0.9%	0.8%	10.1%	6.3%

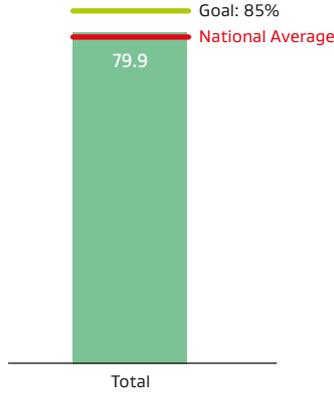
CANTERBURY

SKILLS PIPELINE

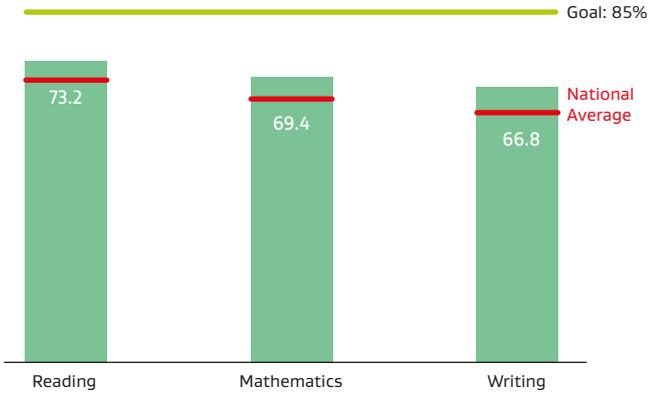
PERCENTAGE OF PRIMARY STUDENTS AT OR ABOVE NATIONAL STANDARDS, 2013



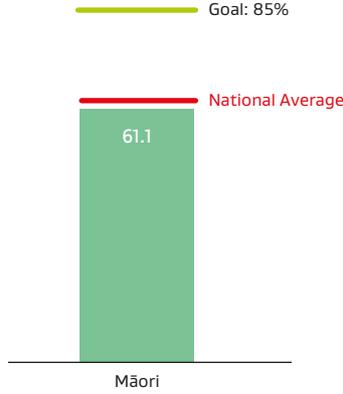
PERCENTAGE OF 18 YEAR OLDS WITH NCEA LEVEL 2 OR EQUIVALENT, 2013



PERCENTAGE OF MĀORI STUDENTS AT OR ABOVE NATIONAL STANDARDS, 2013



PERCENTAGE OF MĀORI 18 YEAR OLDS WITH NCEA LEVEL 2 OR EQUIVALENT, 2013



LIVING STANDARDS

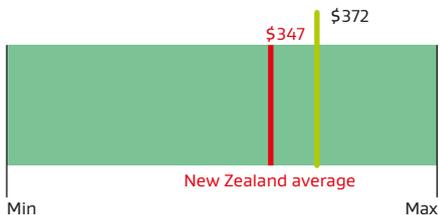
AVERAGE HOUSE PRICE, CANTERBURY, 2014



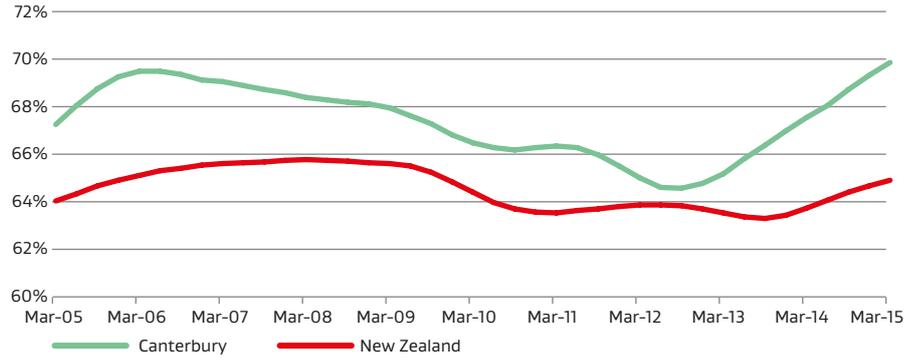
AVERAGE HOUSEHOLD INCOME, CANTERBURY, 2014



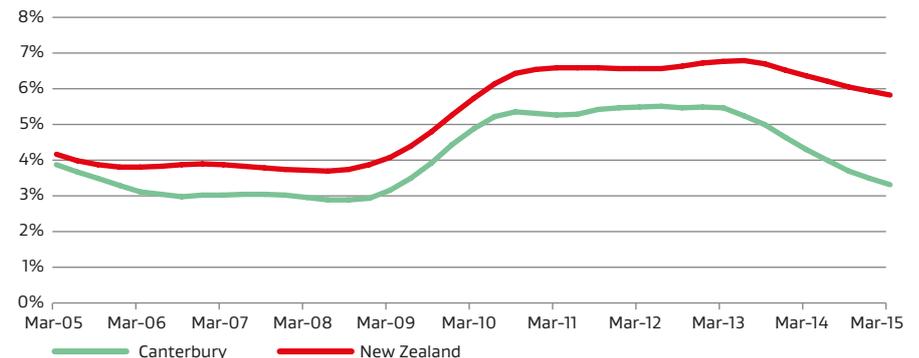
AVERAGE HOUSEHOLD WEEKLY RENT, CANTERBURY, 2014



ANNUAL AVERAGE EMPLOYMENT RATES, 2005-2015



ANNUAL AVERAGE UNEMPLOYMENT RATES, 2005-2015



oats. Canterbury's water accounts for 58 per cent of New Zealand's hydro-electricity generation capacity, and underpins the region's agricultural sector.

Living Standards and Jobs

Labour supply in the region remains tight. The unemployment rate remains low, at 3.2 per cent, around half that of the rest of New Zealand, while labour force participation is extremely high, at 72.7 per cent. Canterbury has the second lowest proportion of youth not in employment, education or training (NEET) in the country (8.1 per cent; behind Otago).

Outlook

The earthquakes that hit Canterbury in September 2010 and February 2011 had a major negative effect on the region's economy. Four years on and many indicators are positive, pointing to underlying resilience in the regional economy. The Canterbury Mayoral Forum is positioning the region for long-term sustainable growth as the earthquake rebuild levels off; and in August 2015, the Forum launched the Canterbury Regional Economic Development Strategy.

This regional chapter contains a detailed summary of the current state of the Canterbury rebuild.

PEOPLE		Canterbury	NZ	% of NZ
Population		574,300	4,509,700	12.7%
Share of population (%): 0–14 years		18.5	20.2	
15–24 years		13.9	14.2	
25–64 years		52.1	51.2	
65 years+		15.4	14.4	
Māori share of population (%)		7.8	14.1	
Net annual international migration		6,378	58,259	
Projected population growth 2013–2043, annual average		0.9	0.8	
Dependency ratio	2014	51.4	53	
	2043	70.3	68.3	

LIVING STANDARDS		Canterbury	NZ	% of NZ
Regional GDP (\$m)		30,204	229,718	13.1%
GDP per capita (\$)		53,054	51,319	
Mean household income		95,000	89,000	
Median house price		410,000	430,000	
Mean weekly rent		372	347	

SKILLS & JOBS		Canterbury	NZ	% of NZ
Total employment		341,411	2,504,814	13.6%
Employment rate		70.4	65.2	
Unemployment rate		3.2	5.7	
Labour force participation rate		72.7	69.1	
% of 18 year olds obtaining minimum NCEA Level 2		79.9	78.6	
NEET rate		8.1	11.4	
% of 25–34 year olds with level 4 qualifications or higher		51.5	54.2	
Skilled and highly skilled jobs as a share of total employment		57.4	58.6	

Business Growth Agenda actions relevant to Canterbury

Improved trade access for exporters with Korean FTA and Trans-Pacific Partnership

Extend the Ultra-Fast Broadband network to smaller towns

Lift rural broadband speeds with the Rural Broadband Initiative

Complete the Roads of National Significance to link main centres with regional NZ

Regional roading upgrades

Education New Zealand Regional Partnership programme to grow international education

Tourism Growth Partnership Fund to grow Tourism Infrastructure

Complete Nga Haerenga – The New Zealand Cycle Trail

Attract new investment & jobs with the Regional Investment Attraction Programme

Relaunch the Regional Business Partners Programme for Canterbury SMEs

Build Regional Business Hubs

Primary Growth Partnerships R & D Programme

Encourage Water Storage Projects with the Irrigation Acceleration Fund & Crown Irrigation

Unlock the productivity of Maori-owned land

Resource Management Reforms to speed up decision-making

Increase supply of affordable housing through Housing Accords and Special Housing Areas

Increase social housing provision through community providers

Māori and Pasifika Trades Training

Encourage vocation training with NZ Apprenticeships programme and trades academies

Boost Regional skilled migration and South Island immigration opportunities

Rebuild Christchurch Hospital

Build the Christchurch Convention Centre

Implement Christchurch Central Recovery Plan

Establish ICT graduate schools

CANTERBURY

PROGRESS OF THE REBUILD

Latest Statistics New Zealand estimates show that in the June 2015 quarter, approximately \$1.2 billion of construction work was completed. According to CERA projections, the region is approaching the peak of rebuild work – though work is expected to continue at this level for the next three years.

According to MBIE modelling work, there are approximately 31,000 construction-related workers employed in the region, up from 15,000 pre-earthquake. This workforce is projected to be at a peak level, which is expected to continue at this level until 2018. As most housing repair work is completed, the work is moving towards larger commercial work, which will require a different mix of workers to complete. Construction employment is projected to return to pre-quake levels by 2022.

As the peak of the rebuild approaches, there is evidence of easing cost pressure in Canterbury's construction sector. Construction labour cost growth for Canterbury has been stronger than the rest of the country over the past four years, but has been lower for the last two quarters. For the June 2015 quarter, construction labour costs in Canterbury grew 0.5 per cent (up from 0.2 per cent for the March 2015 quarter), compared with 0.7 per cent for the rest of the country (up from 0.3 per cent last quarter).

FIGURE 8 – VALUE OF WORK DONE

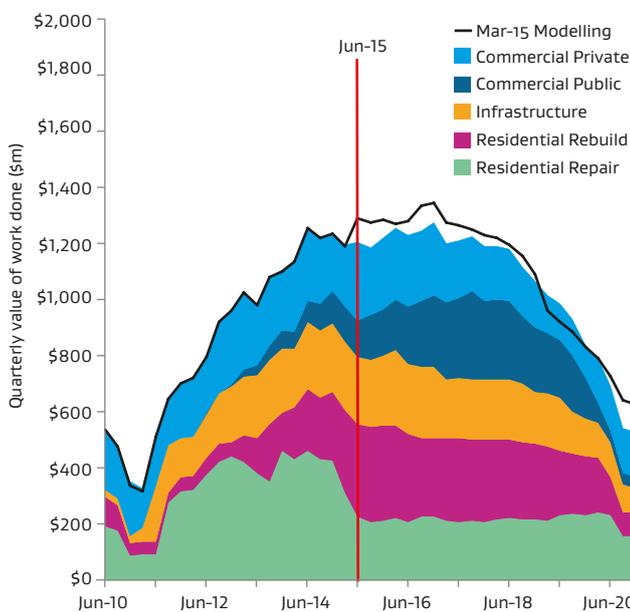
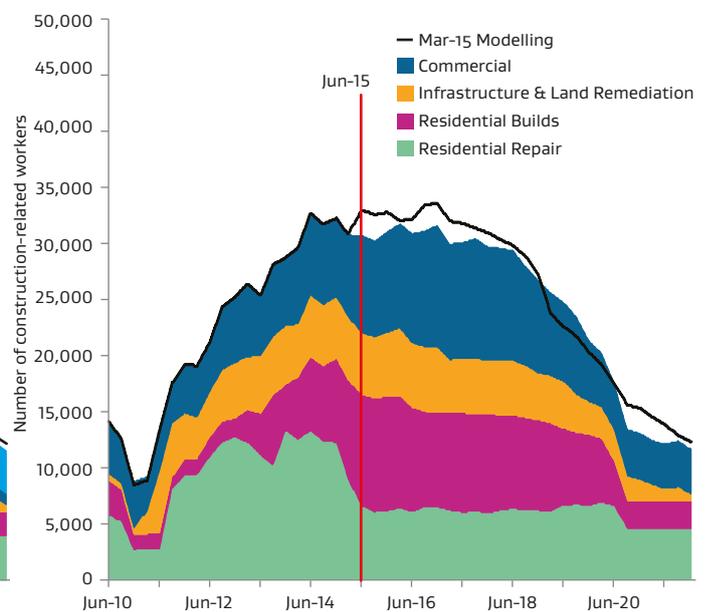


FIGURE 9 – NUMBER OF CONSTRUCTION-RELATED WORKERS



Impact of recovery on living standards

Housing

Modelling suggests that the shortage in housing in Canterbury has fallen in the last year. In the June 2015 quarter, there was an estimated 8,000 shortage of households in the region, compared with 10,000 the year before. This does not mean that the people in 8,000 households in Canterbury are homeless. It means that these people have been absorbed into the existing housing stock in some way, for instance by doubling up accommodation. The reduction in housing pressure is set

to continue over the next two years, as stock is repaired and rebuilt, with demand equalling supply in early 2017.

Estimates indicate that the number of completed dwellings has now replaced those lost due to the earthquakes in greater Christchurch, with half of these new dwellings situated in the Waimakariri and Selwyn districts. Annual average house prices in greater Christchurch are in line with national trends, up 3 per cent in Christchurch City, 4 per cent in Waimakariri District

and 5 per cent in Selwyn District, while Auckland increased 10 per cent.

Overall supply within the rental market is beginning to grow, stabilizing the average rental price (to \$420 per week). However the supply of lower cost rentals (less than \$400 per week) is below pre-earthquake levels and this may limit options for low-income households.

FIGURE 10 – ACCOMMODATION REQUIREMENTS IN CANTERBURY

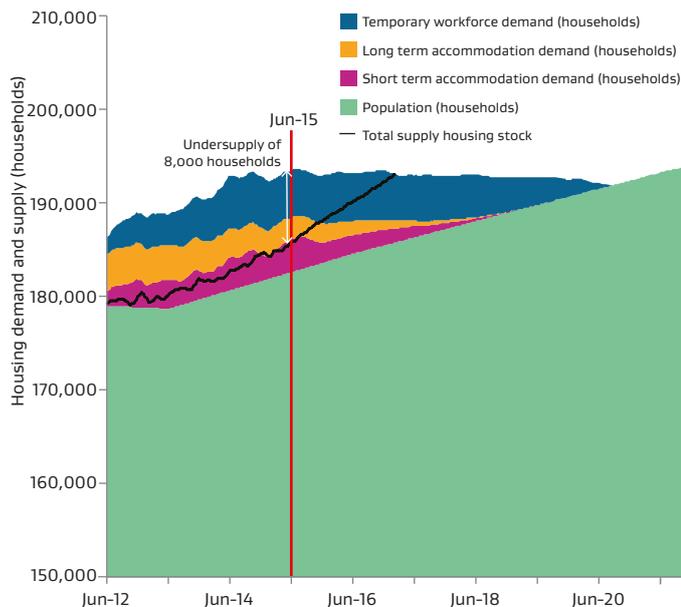


FIGURE 11 – FORECAST HOUSING SHORTFALL

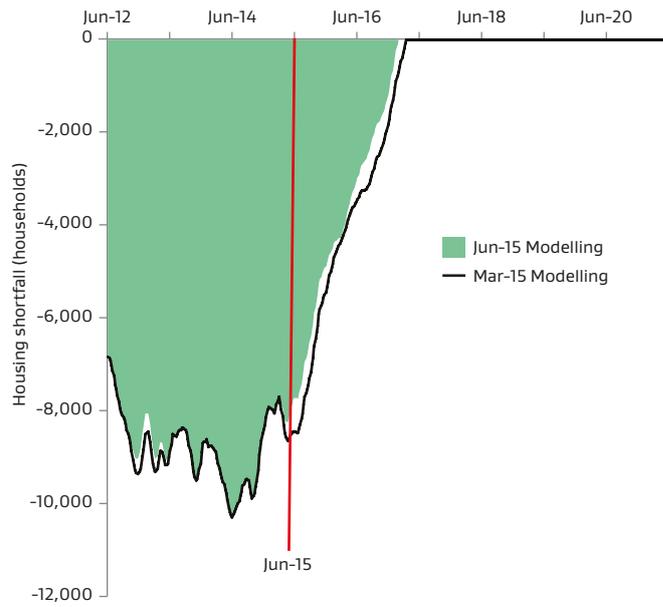


FIGURE 12 – ANNUAL AVERAGE HOUSE PRICE GROWTH

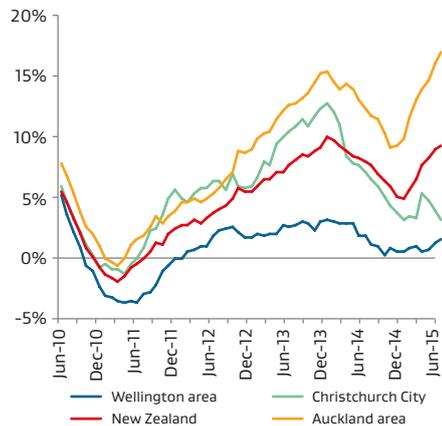


FIGURE 13 – AVERAGE RENT FROM NEW BONDS LODGED BY MAJOR NZ REGIONS

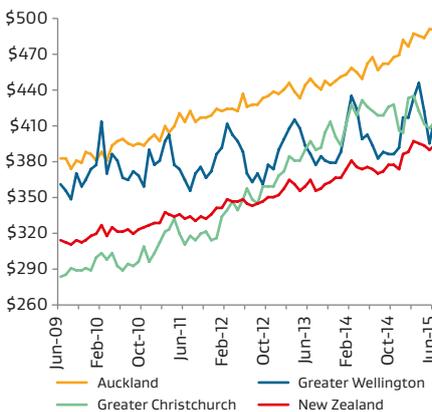
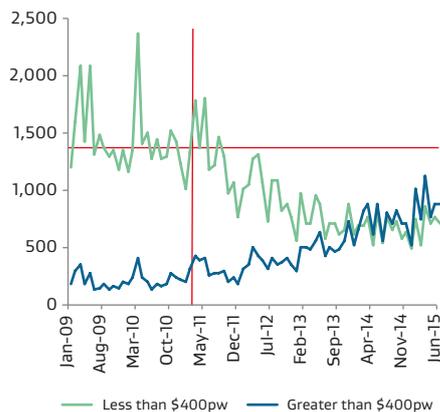


FIGURE 14 – PRIVATE BONDS LODGED BY PRICE BAND GREATER CHRISTCHURCH REGION



Social Recovery

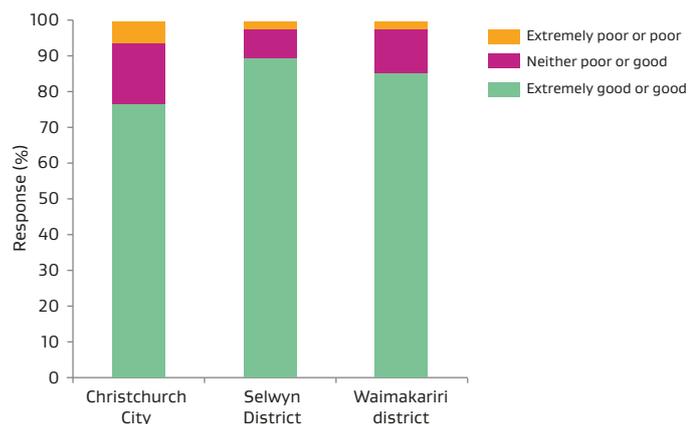
According to the April 2015 CERA Wellbeing survey, quality of life in greater Christchurch is continuing to improve, with 79 per cent of respondents reporting a positive overall quality of life and 22 per cent reported an improvement from a year ago. Results show that many residents

are feeling increasingly positive about their lives, about tangible signs of progress, about opportunities to experience public events and spaces, and about business and employment opportunities.

Christchurch City residents continue to rate their quality of life less positively than residents of Selwyn

and Waimakariri, with 77 per cent rating it as extremely good or good and 6 per cent rating it extremely poor or poor. However, the proportion of Christchurch city residents who rate their quality of life positively is continuing on an upward trend since September 2013.

FIGURE 15 – PERCEPTION OF QUALITY OF LIFE



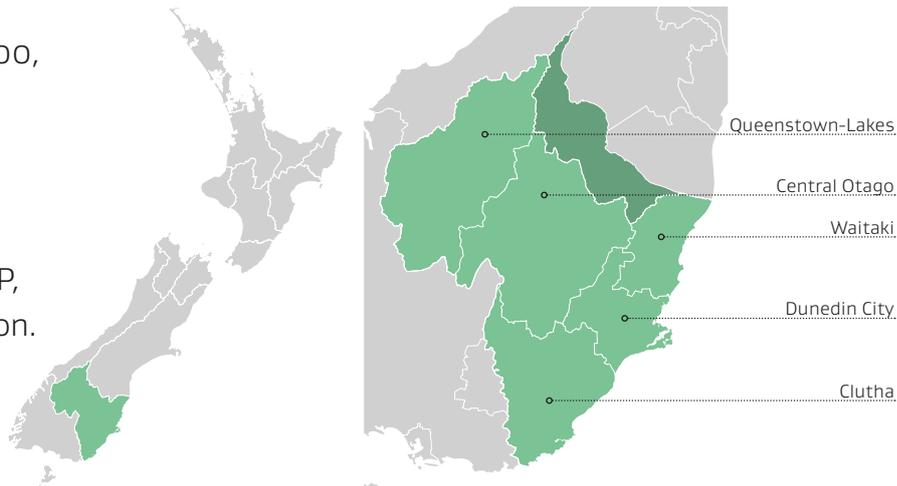
A number of groups are more likely to report a lower quality of life, including those with unresolved insurance claims, lower incomes, health conditions or disabilities, living in temporary housing or renting.

Three quarters (75%) of greater Christchurch residents have experienced stress at least sometimes in the past 12 months that has had a negative effect on them, with 19% saying that they experience this stress most or all of the time.



Otago

Otago, with a population of 211,600, has a diverse economy with strengths in education, tourism, agriculture, niche manufacturing and design. Otago accounts for 4.3 per cent of New Zealand’s GDP, and 4.7 per cent of total population.



Economy

The Otago economy has considerable diversity across its five territorial authorities. Education and health care are the main focus of Dunedin City’s economy, with just over a quarter (26.4 per cent) of all employment being in one of those two industries. This reflects the importance of Dunedin’s educational assets: the University of Otago alone has been estimated to contribute around 15 per cent of the city’s GDP (University of Otago, 2015). Manufacturing employment has been declining in Dunedin, although this is being offset with gains in the high-tech and ICT sectors.

The Clutha and Waitaki Districts are relatively specialised in sheep, beef cattle and grain farming and both districts have seen increased levels of dairying over the past decade. Central Otago District has strengths in stone and pip fruit, grape growing and wine production. Over six per cent of employment is in the horticulture and viticulture industry, compared with 1.4 per cent for New Zealand as a whole. The district produces over 90 per cent of New Zealand’s cherries, mostly for export markets, and around two-thirds of the nation’s apricots.

Queenstown-Lakes District has a strong tourism focus; based around

its ski-fields, adventure activities and natural beauty. Twenty-two per cent of employment is in accommodation and food services, compared to 6.4 per cent for the rest of the country. The district has experienced employment growth above the national average in most industries, with growth in the past decade being particularly strong for professional, scientific and administrative services and construction.

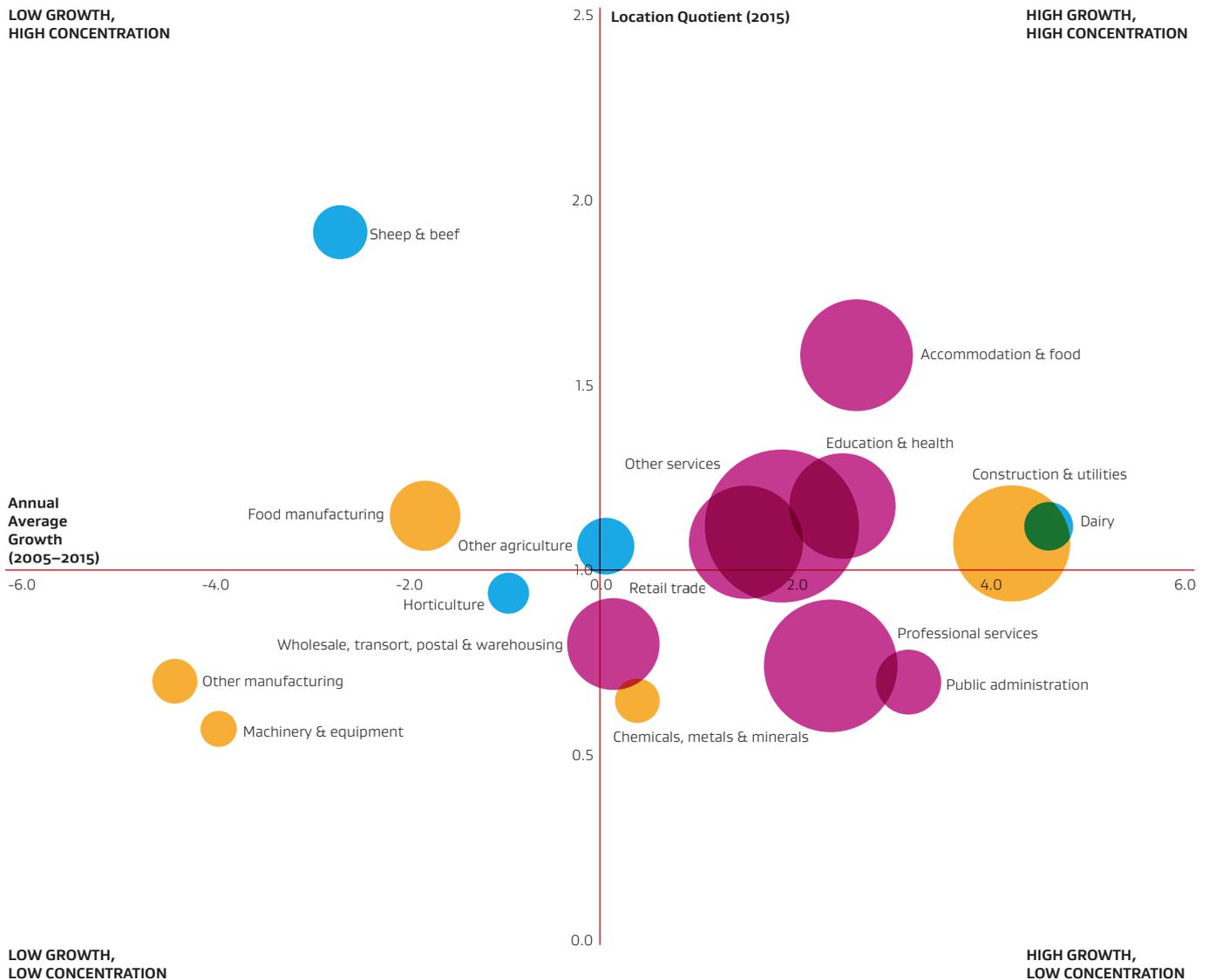
Natural Resources

Otago’s natural resources provide a strong base for primary production, hydroelectric generation and world-renowned tourist destinations. The soils and climate of Central Otago provide unique advantages for horticulture and viticulture, and the region is internationally regarded for the quality of its wines. Over 60 per cent of New Zealand’s summerfruit crops are planted in the district, mostly apricots and cherries.

Although just under a quarter of New Zealand’s surface lake water is found in Otago, many parts of the region have low rainfall and limited water access, making efficiently managed irrigation systems an important part of local infrastructure. Over the past 15 years, Otago has seen

EMPLOYMENT BY INDUSTRY

EMPLOYMENT GROWTH AND CONCENTRATION COMPARED TO THE NATIONAL AVERAGE



NOTE: Location Quotient is the proportion of total employment in a given industry and region, divided by the proportion in that industry at a national level

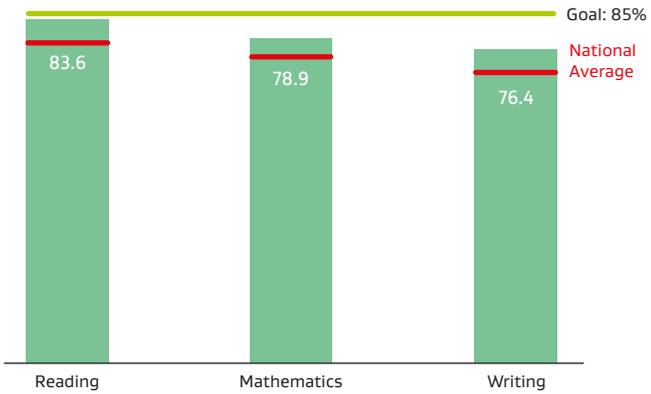
AREAS OF REGIONAL STRENGTH

INDUSTRY	SHARE OF TOTAL EMPLOYMENT			EMPLOYMENT GROWTH 2005–2015, ANNUAL AVERAGE	
	EMPLOYMENT COUNT	OTAGO	NZ	OTAGO	NZ
Grain, Sheep and Beef Cattle Farming	2,933	2.3%	1.2%	-2.6%	-2.1%
Arts and Recreation Services	4,287	3.4%	2.0%	4.2%	3.7%
Mining	550	0.4%	0.3%	2.2%	3.8%
Accommodation and Food Services	12,556	10.0%	6.4%	2.6%	1.8%
Education and Training	11,249	9.0%	7.5%	1.2%	1.4%

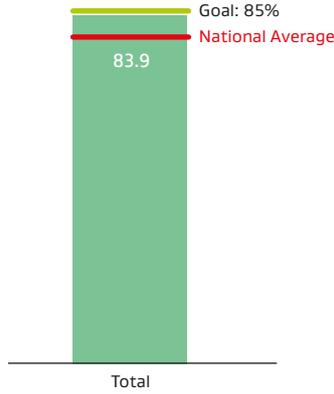
OTAGO

SKILLS PIPELINE

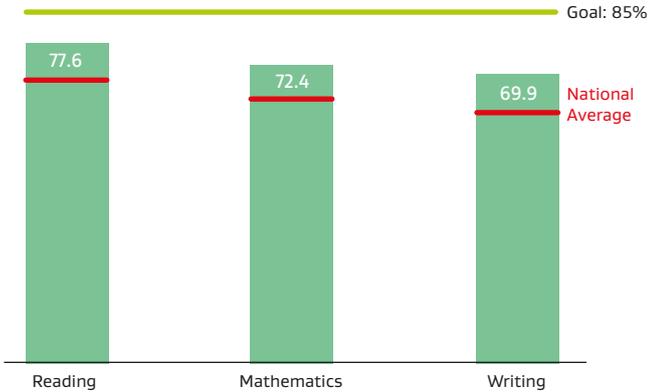
PERCENTAGE OF PRIMARY STUDENTS AT OR ABOVE NATIONAL STANDARDS, 2013



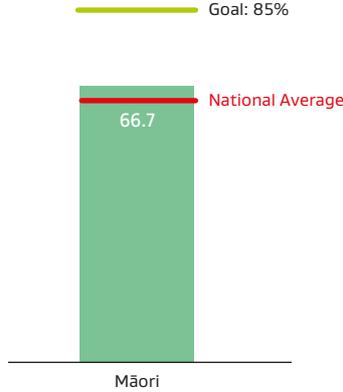
PERCENTAGE OF 18 YEAR OLDS WITH NCEA LEVEL 2 OR EQUIVALENT, 2013



PERCENTAGE OF MĀORI STUDENTS AT OR ABOVE NATIONAL STANDARDS, 2013



PERCENTAGE OF MĀORI 18 YEAR OLDS WITH NCEA LEVEL 2 OR EQUIVALENT, 2013



LIVING STANDARDS

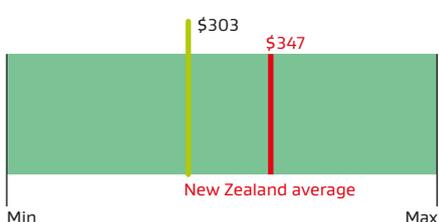
AVERAGE HOUSE PRICE, OTAGO, 2014



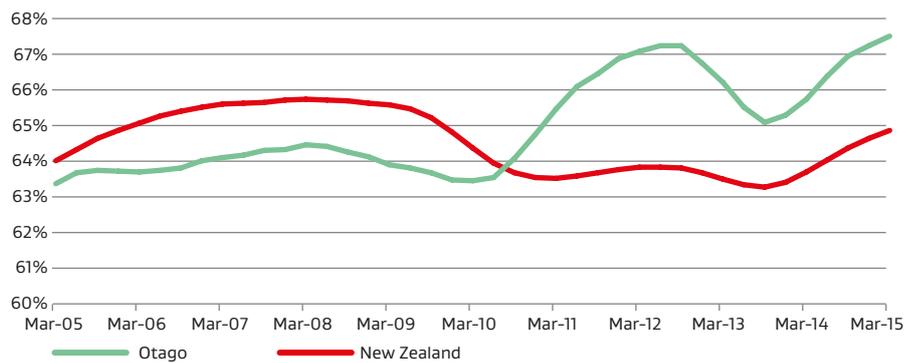
AVERAGE HOUSEHOLD INCOME, OTAGO, 2014



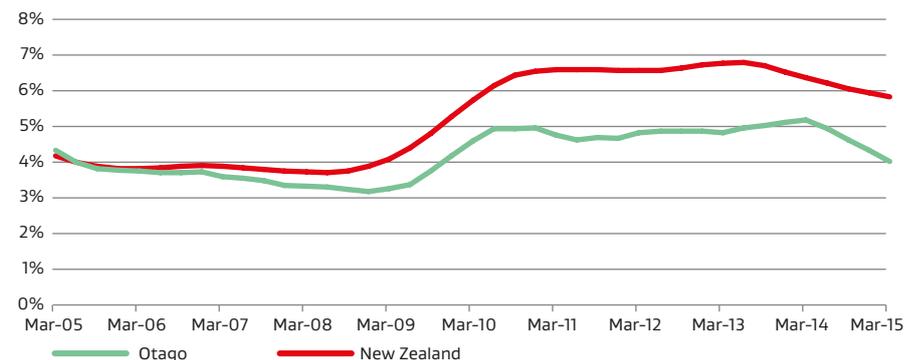
AVERAGE HOUSEHOLD WEEKLY RENT, OTAGO, 2014



ANNUAL AVERAGE EMPLOYMENT RATES, 2005–2015



ANNUAL AVERAGE UNEMPLOYMENT RATES, 2005–2015



a more than four-fold increase in its dairy cattle numbers, with associated pressures on water supply.

Living Standards and Jobs

Otago's mean household income (\$90,500) sits slightly above the national average of \$89,000, although there is considerable diversity across the region. Queenstown-Lakes District has the third-highest mean household income of any territorial authority (\$111,100), whereas incomes in Central Otago (\$86,200) and Clutha (\$86,600) sit below the national average. Housing costs vary across the region, with shortages of suitable land and strong population growth pushing Queenstown-Lakes housing prices to among the highest in the country.

Although parts of the region have a relatively high proportion of tertiary students and seasonal workers, Otago has seen some of the strongest income growth of any region in the past decade. Central Otago, Dunedin, Clutha and Queenstown-Lakes all feature in the top ten districts for growth, in both mean and median household income, between 2004 and 2014.

Outlook

Otago, through Dunedin City's education and health sector, is well positioned to continue to develop high-value niches within health technologies and biotechnology, food processing, manufacturing, engineering and ICT. Developing these niches into successful commercial enterprises will grow the

region's economy, adding diversity and resilience, and complementing Dunedin City's existing strengths in the health and education sectors. Otago can also generate higher returns from its tourism sector through greater product and market segmentation, with the aim of generating greater tourist expenditure per night. Marketing the region as a high-quality food producer may further grow its agriculture, horticulture and tourism sectors.

PEOPLE		Otago	NZ	% of NZ
Population		211,600	4,509,700	4.7%
Share of population (%): 0–14 years		17.2	20.2	
15–24 years		16.8	14.2	
25–64 years		50.1	51.2	
65 years+		15.9	14.4	
Māori share of population (%)		7.1	14.1	
Net annual international migration		1,397	58,259	
Projected population growth 2013–2043, annual average		0.5	0.8	
Dependency ratio	2014	49.3	53	
	2043	70.8	68.3	
LIVING STANDARDS		Otago	NZ	% of NZ
Regional GDP (\$m)		9,813	229,718	4.3%
GDP per capita (\$)		46,684	51,319	
Mean household income		90,500	89,000	
Median house price		268,000	430,000	
Mean weekly rent		303	347	
SKILLS & JOBS		Otago	NZ	% of NZ
Total employment		125,285	2,504,814	5.0%
Employment rate		67.9	65.2	
Unemployment rate		3.8	5.7	
Labour force participation rate		70.6	69.1	
% of 18 year olds obtaining minimum NCEA Level 2		83.9	78.6	
NEET rate		6.3	11.4	
% of 25–34 year olds with level 4 qualifications or higher		58.0	54.2	
Skilled and highly skilled jobs as a share of total employment		56.2	58.6	



Business Growth Agenda actions relevant to Otago

Improved trade access for exporters with Korean FTA and Trans-Pacific Partnership

Extend the Ultra-Fast Broadband network to smaller towns

Lift rural broadband speeds with the Rural Broadband Initiative

Build replacement Kawerau Falls Bridge & other regional roading upgrades

Education New Zealand Regional Partnership programme to grow international education

Tourism Growth Partnership Fund to grow Tourism Infrastructure

Complete Nga Haerenga – The New Zealand Cycle Trail

Attract new Investment & jobs with the Regional Investment Attraction Programme

Relaunch the Regional Business Partners Programme for Otago SMEs

Build Regional Business Hubs

Regional Research Institutes Programme

Strengthen Callaghan Innovation's regional footprint

Primary Growth Partnerships R & D Programme

Encourage Water Storage Projects with the Irrigation Acceleration Fund & Crown Irrigation

Unlock the productivity of Maori-owned land

Resource Management Reforms to speed up decision-making

Increase supply of affordable housing through Housing Accords and Special Housing Areas

Increase social housing provision through community providers

Māori and Pasifika Trades Training

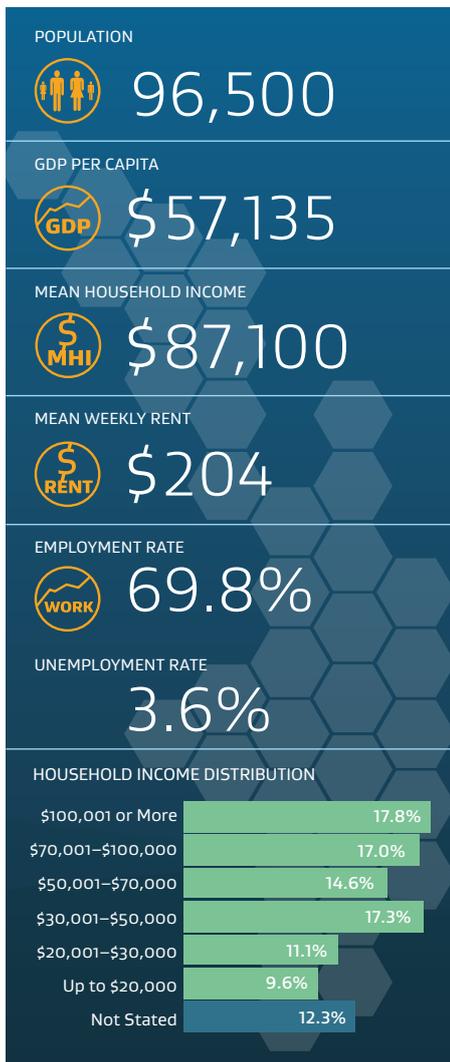
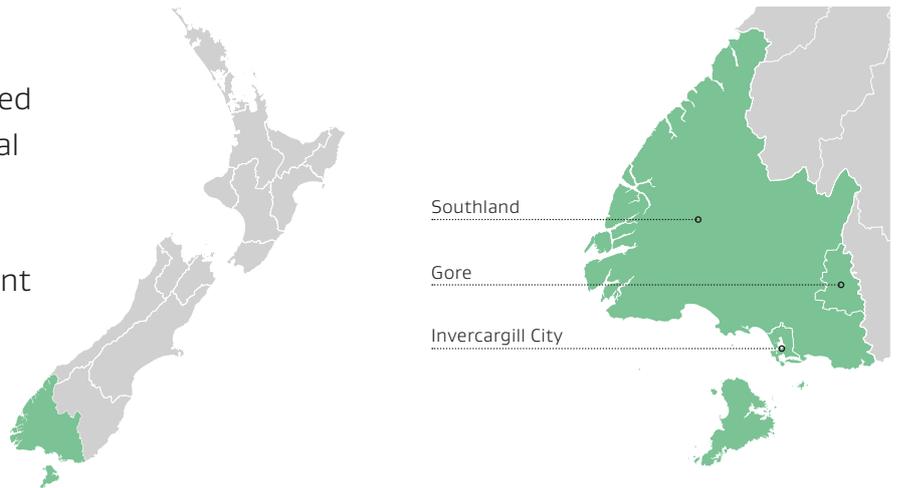
Encourage vocation training with NZ Apprenticeships programme and trades academies

Boost Regional skilled migration and South Island immigration opportunities



Southland

Southland, with a population of 96,500, is a small- to medium-sized economy with a strong agricultural and manufacturing base. In 2014, it accounted for 2.4 per cent of New Zealand's GDP, and 2.1 per cent of national population.



Economy

Southland has strengths in export-focused agri-business, with 12 per cent of employment being in dairy farming or sheep, beef and cattle farming (this compares with under 3 per cent for the rest of New Zealand). Southland also has a higher concentration of employment in manufacturing than any other region, with 15.3 per cent of employees working in this sector. Manufacturing employment reflects the underlying strengths of the region, with a focus on dairy processing. Beyond Southland's traditional industries, the region has emerging strengths in tourism, niche manufacturing, and export education.

Invercargill City forms a manufacturing and services hub for the region. In total, 18.2 per cent of the city's employment is in manufacturing, the highest proportion of any New Zealand city. Two particular industries – meat processing and basic non-ferrous metal manufacturing (which includes aluminium smelting) – account for over half the city's manufacturing employment.

Southland District and Gore District have broadly similar economic structures, with a focus on agricultural production; the only significant difference being sheep farming

still accounts for a slightly larger proportion of Gore's employment than dairy farming.

Shifts in land-use patterns are reflected in employment change, with dairy farming employment increasing at the expense of sheep farming. Southland has also experienced the same national trend of a shift in employment from manufacturing to services. Between 2009 and 2014, Southland's GDP increased by 23.9 per cent (slightly above the national movement of 22.4 per cent). This increase was driven by agriculture, which more than offset declines in manufacturing production.

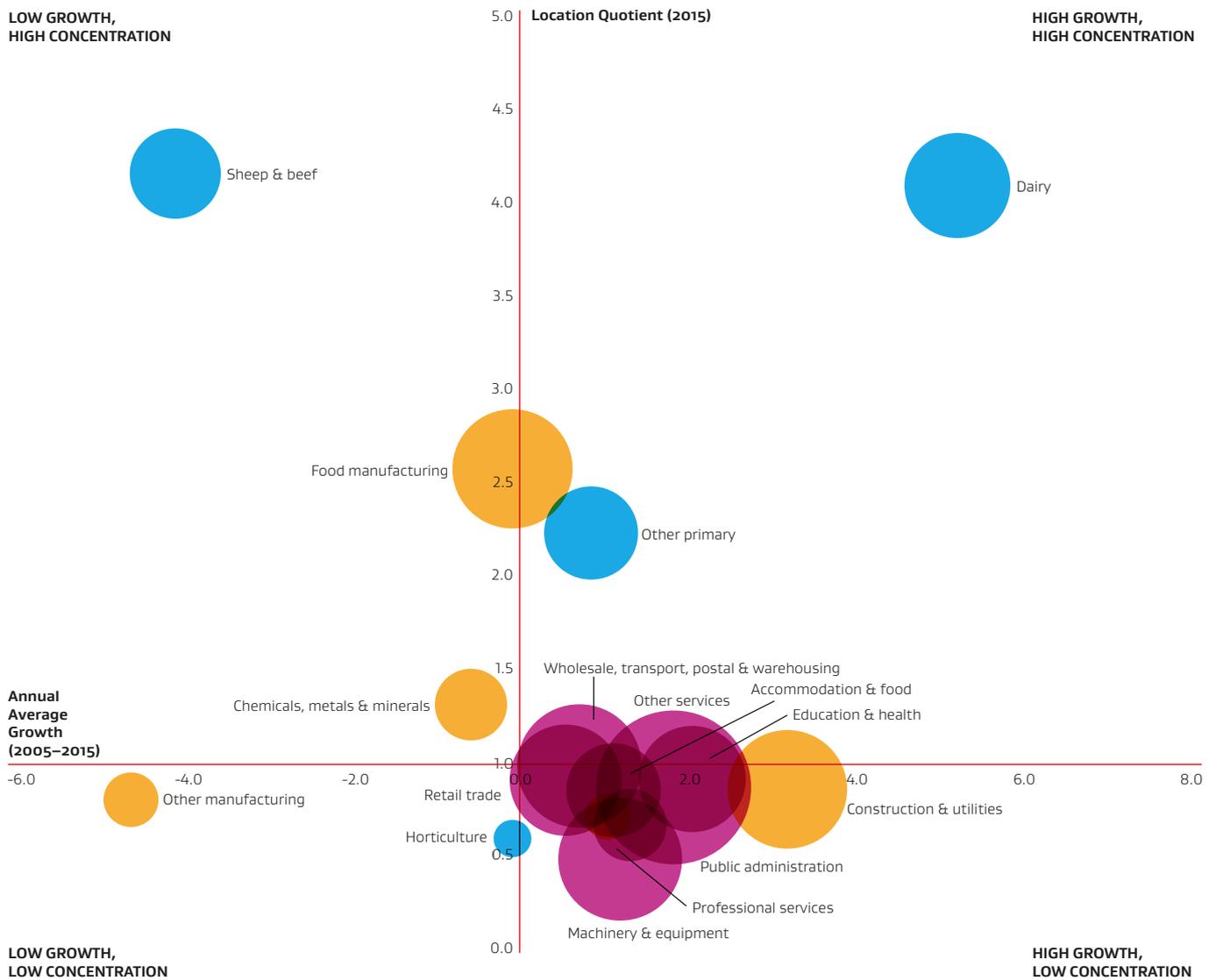
Natural Resources

Southland is New Zealand's second-largest region by land area, covering 32,000 square kilometres, over half of which sits in the conservation estate. These conservation lands hold high economic value for Southland, supporting the tourism industry and yielding over 90 per cent of the region's freshwater.

Most of the remaining non-conservation land is farmland. Dairy conversion has been the most noticeable feature of Southland's rural landscape in recent decades, with the

EMPLOYMENT BY INDUSTRY

EMPLOYMENT GROWTH AND CONCENTRATION COMPARED TO THE NATIONAL AVERAGE



NOTE: Location Quotient is the proportion of total employment in a given industry and region, divided by the proportion in that industry at a national level

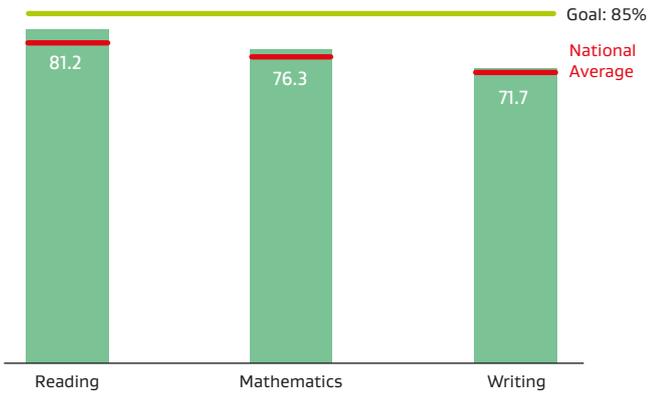
AREAS OF REGIONAL STRENGTH

INDUSTRY	SHARE OF TOTAL EMPLOYMENT			EMPLOYMENT GROWTH 2005-2015, ANNUAL AVERAGE	
	EMPLOYMENT COUNT	SOUTHLAND	NZ	SOUTHLAND	NZ
Grain, Sheep and Beef Cattle Farming	2,896	5.1%	1.2%	-4.0%	-2.1%
Dairy Cattle Farming	3,920	6.9%	1.7%	5.1%	1.0%
Fishing	355	0.6%	0.2%	0.3%	-0.7%
Food manufacturing	5,046	8.9%	3.5%	-0.1%	0.4%
Other agriculture	2,327	4.1%	1.8%	0.6%	1.4%

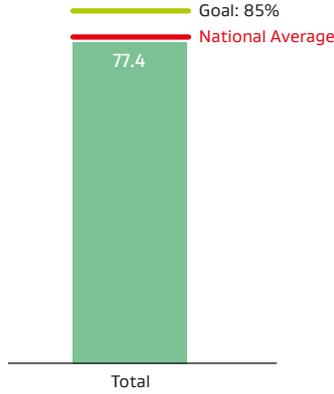
SOUTHLAND

SKILLS PIPELINE

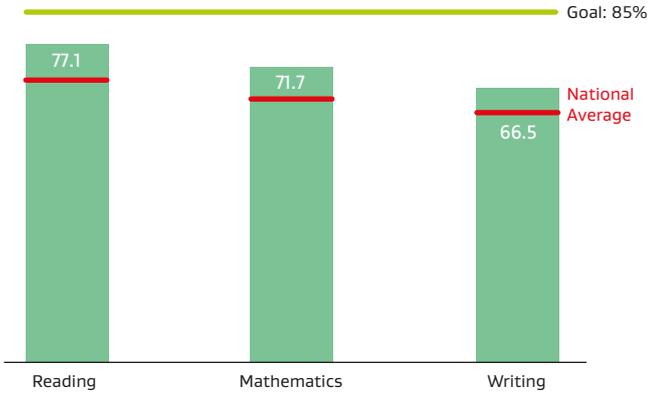
PERCENTAGE OF PRIMARY STUDENTS AT OR ABOVE NATIONAL STANDARDS, 2013



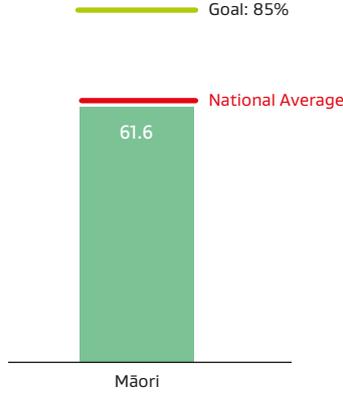
PERCENTAGE OF 18 YEAR OLDS WITH NCEA LEVEL 2 OR EQUIVALENT, 2013



PERCENTAGE OF MĀORI STUDENTS AT OR ABOVE NATIONAL STANDARDS, 2013



PERCENTAGE OF MĀORI 18 YEAR OLDS WITH NCEA LEVEL 2 OR EQUIVALENT, 2013



LIVING STANDARDS

AVERAGE HOUSE PRICE, SOUTHLAND, 2014



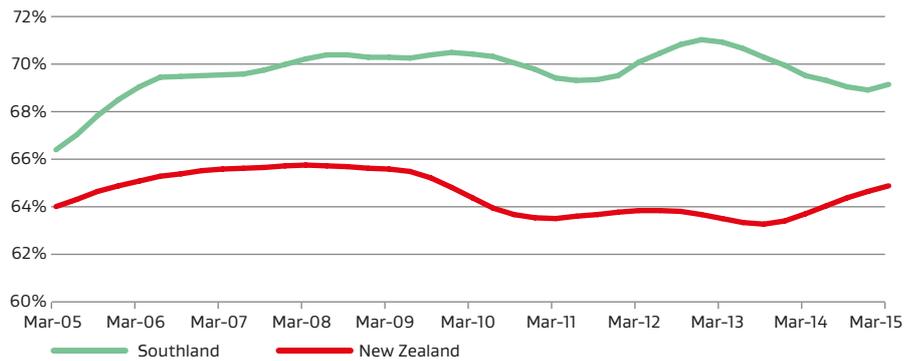
AVERAGE HOUSEHOLD INCOME, SOUTHLAND, 2014



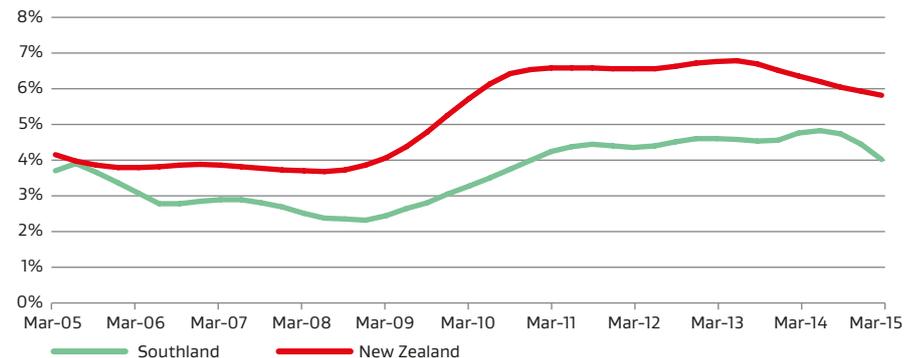
AVERAGE HOUSEHOLD WEEKLY RENT, SOUTHLAND, 2014



ANNUAL AVERAGE EMPLOYMENT RATES, 2005-2015



ANNUAL AVERAGE UNEMPLOYMENT RATES, 2005-2015



number of dairy cattle in the region increasing more than five-fold between 1994 and 2013. Sheep numbers have almost halved in the same period.

The region's economy relies extensively on its natural asset base. For example, both the dairy industry and the Tiwai Point Aluminium Smelter, which are large employers and generators of income, are dependent on freshwater for irrigation and power generation.

Living Standards and Jobs

Southland's mean household income sits slightly below the New Zealand average (\$87,100 in 2014, compared to \$89,000 nationally). However, major living costs are substantially lower. Southland has the lowest average house price (\$188,000) and mean weekly rent (\$204) in the country.

Southland has one of the highest employment rates in the country, and a low unemployment rate. The regional economy has been generating employment opportunities faster than the relatively older population is able to grow.

The supply of skills could prove a constraint to future development. Southland has a lower proportion of people in skilled and highly-skilled employment, and secondary and tertiary attainment rates are lower than the national average.

Outlook

Southland has the opportunity to increase economic outputs by continuing to raise productivity in areas of traditional strength, such as sheep and beef cattle farming, dairy

and aquaculture. The region will need to do this in a way that is mindful of the existing environmental constraints. Continuing to diversify the regional economy and promote new and existing sectors would be beneficial. Opportunities include tourism, information technology, transformed manufacturing (pharmaceuticals and electronics), grain-based protein systems, the Awarua Earth Observation system and international education. The retention and attraction of skilled young people and the utilisation of its older population will ensure that continued growth is not hindered by shortages in the labour force.

PEOPLE	Southland	NZ	% of NZ
Population	96,500	4,509,700	2.1%
Share of population (%): 0–14 years	20.5	20.2	
15–24 years	12.4	14.2	
25–64 years	51.2	51.2	
65 years+	15.8	14.4	
Māori share of population (%)	12.4	14.1	
Net annual international migration	638	58,259	
Projected population growth 2013–2043, annual average	0.0	0.8	
Dependency ratio	2014	57.2	53
	2043	79.2	68.3

LIVING STANDARDS	Southland	NZ	% of NZ
Regional GDP (\$m)	5,502	229,718	2.4%
GDP per capita (\$)	57,135	51,319	
Mean household income	87,100	89,000	
Median house price	188,000	430,000	
Mean weekly rent	204	347	

SKILLS & JOBS	Southland	NZ	% of NZ
Total employment	56,802	2,504,814	2.3%
Employment rate	69.8	65.2	
Unemployment rate	3.6	5.7	
Labour force participation rate	72.4	69.1	
% of 18 year olds obtaining minimum NCEA Level 2	77.4	78.6	
NEET rate	14.5	11.4	
% of 25–34 year olds with level 4 qualifications or higher	42.4	54.2	
Skilled and highly skilled jobs as a share of total employment	53.3	58.6	

Business Growth Agenda actions relevant to Southland

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Boost Regional skilled migration and South Island immigration opportunities





SPECIAL FEATURE:

Tourism in New Zealand Regions

Tourism in New Zealand Regions

Tourism plays a crucial role in New Zealand’s economy, and is currently our second largest export industry, behind the dairy industry. The impact of tourism differs across the country, and this special feature examines the regional dimensions of the tourism industry.

Key Markets – Where They Come From

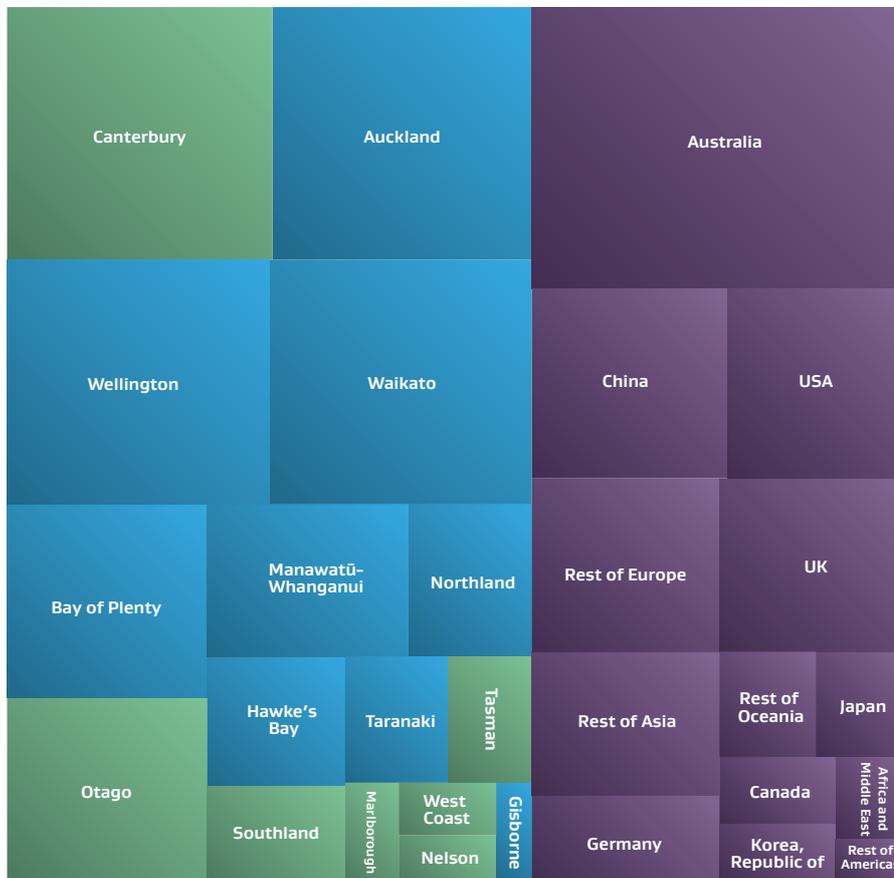
Australia remains the largest international market for spend, with China following in second place, followed by the USA and UK. Visitors from the main centres of Auckland, Canterbury, Wellington and Waikato make up a large majority of domestic visitor spend into the economy.

International visitor arrivals to New Zealand reached 3 million for the first time in the year ended July 2015, 7 per cent higher

than it was a year before. The key markets of Australia, China, USA, UK, Japan and Germany provided 73 per cent of these visitors. In the last year, China contributed the largest increase in visitor arrivals (up 71,800 or 29 per cent).

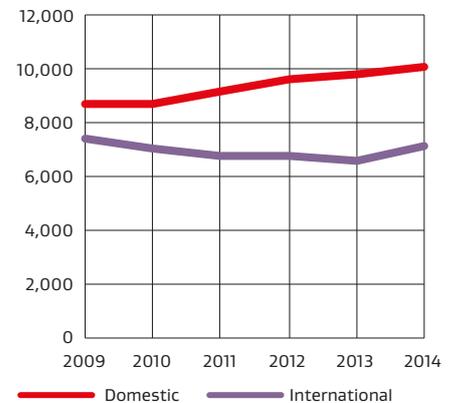
The figures below show the proportions of international and domestic expenditure split between the origin visitor markets, and the trend in total tourism spend from 2009 to 2014.

FIGURE 16 – TOTAL TOURISM SPEND (\$ millions) BY ORIGIN OF VISITORS (2014)



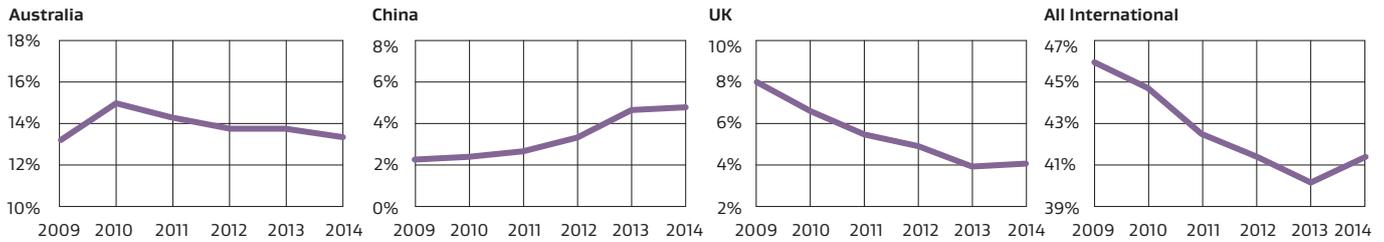
Source: MBIE – Regional Tourism Estimates, year ending March 2014

FIGURE 17 – TOTAL TOURISM SPEND (\$ millions) TIME SERIES



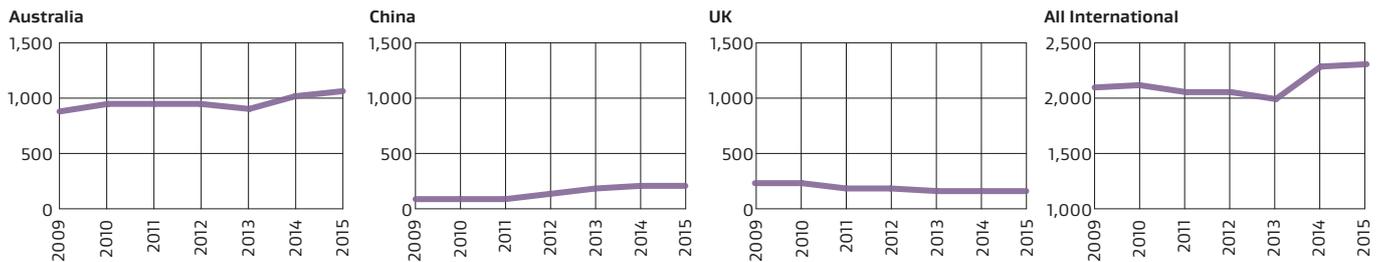
Source: MBIE – Regional Tourism Estimates, March years

FIGURE 18 – INTERNATIONAL SPEND AS PERCENTAGE OF TOTAL SPEND – SELECTED REGIONS OF ORIGIN



Source: MBIE – Regional Tourism Estimates, March years

FIGURE 19 – INTERNATIONAL VISITOR NUMBERS – SELECTED REGIONS OF ORIGIN



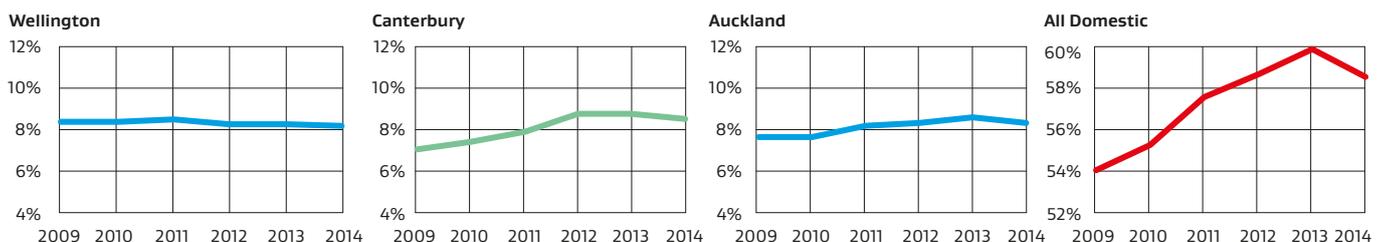
Source: MBIE – Regional Tourism Estimates, March years

The proportion of spend from Australian visitors to New Zealand grew strongly between 2009 and 2010 (post the Global Financial Crisis), reflecting the strength of the Australian economy at the time (and the weakness of other economies), but has been falling or flat in relative terms since then, even though Australian visitor numbers are rising. The proportion of spend contributed by the China market, on the other hand, has grown strongly. This growth has been against

the downward trend for the overall proportion of tourism spend from international visitors from 2009 to 2013.

New Zealand’s third largest tourism market by spend, the UK, fell fairly consistently from 2009 to 2013. However, it has shown signs of recovery to 2014, reflected in the strong growth of the overall international spend for the year.

FIGURE 20 – DOMESTIC SPEND AS PERCENTAGE OF TOTAL SPEND – SELECTED REGIONS OF ORIGIN



Source: MBIE – Regional Tourism Estimates, March years

Domestic visitors from Wellington comprised 8.2 per cent of the total domestic spend contribution to New Zealand in 2014 (\$1,413 million). Visitors from Auckland and Canterbury contributed similar amounts to the domestic tourism economy, at 8.4 per cent and 8.2 per cent respectively (\$1,448 and \$1,480 million).

The similar proportions of domestic visitor spend from these regions may reflect that Aucklanders are more likely to travel

overseas, given the comparative convenience and affordability of international flights, and its high foreign-born population.

The sizeable lift in the domestic share of the total tourism spend from 2009 to 2013 reflected a moderate rise in the total domestic tourism spend and a fall in the total international tourism spend.

Tourism by Region – Where They Go

Regional Shares of Tourism Spend

Both international and domestic tourism play important, varied roles in the different regions of New Zealand. The maps

below show the regional dispersal of tourism spend across the country – total spend (far left), international spend (middle) and domestic spend (far right).

FIGURE 21 – REGIONAL SHARE OF TOTAL VISITOR SPEND 2014

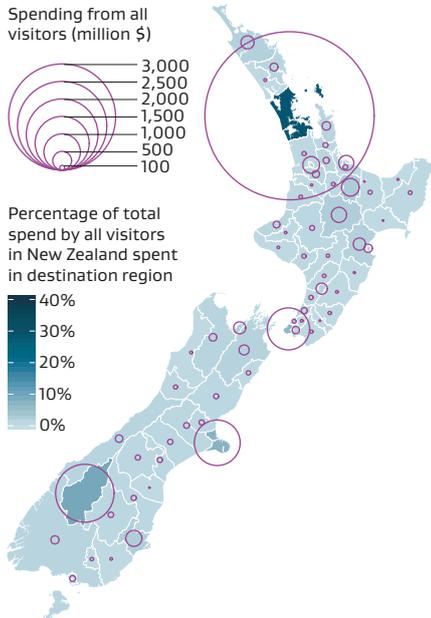


FIGURE 22 – REGIONAL SHARE OF INTERNATIONAL TOURISM SPEND 2014

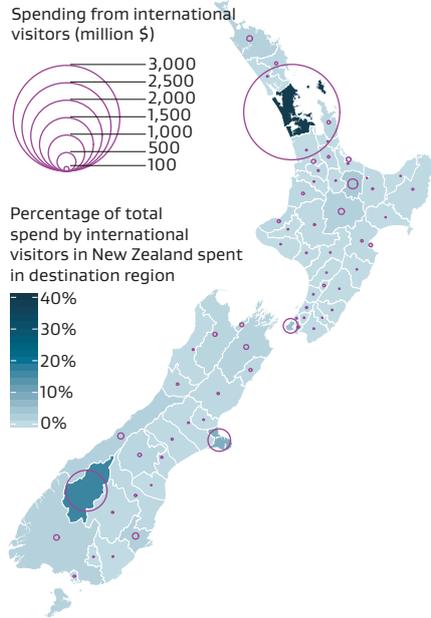
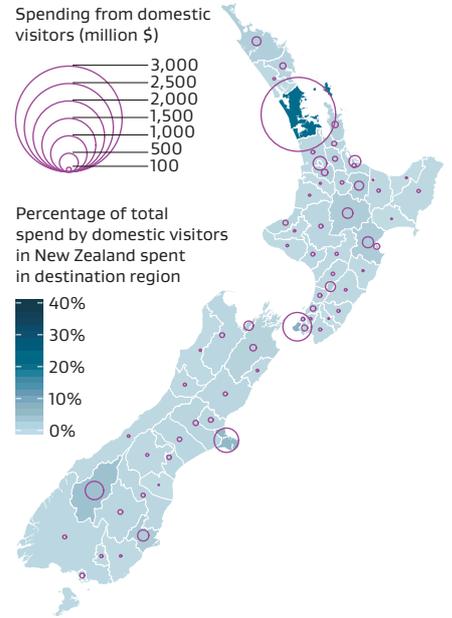


FIGURE 23 – REGIONAL SHARE OF DOMESTIC TOURISM SPEND 2014



Source: MBIE – Regional Tourism Estimates, year ending March 2014

Auckland receives the largest share of the tourism spend by international and domestic visitors. Total spend of all visitors to Auckland in the year ending March 2014 (both domestic and international) was \$4,772 million. This was followed by Queenstown (\$1,622 million), Christchurch (\$1,266 million), and Wellington City (\$1,166 million).

Although both domestic and international tourism spends show concentrations in Auckland and Queenstown, the domestic spend is more widely distributed across New Zealand.

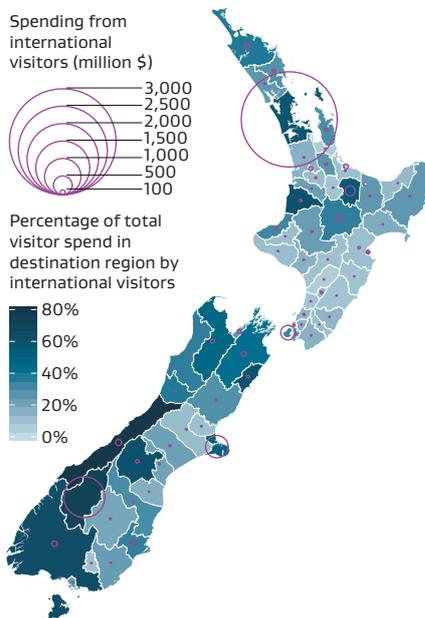
International Tourism Spend

The map shows the relative importance of the international tourism spend to the total tourism spend in each region.

Auckland is a main point of entry for the majority of New Zealand’s international visitors, so it benefits from being the hub to the rest of New Zealand. Other international airports in Queenstown, Wellington City and Christchurch serve fewer direct international flights.

Although the bulk of the total international tourist spend is in Auckland and Queenstown, the relative importance of international tourism to each region is widely distributed across New Zealand. The map illustrates this – for example, many South Island regions (West Coast, Southland, Fiordland, Kaikoura and the Mackenzie country) rely heavily on international tourism (international spend as a proportion of total spend is a lot higher in these regions).

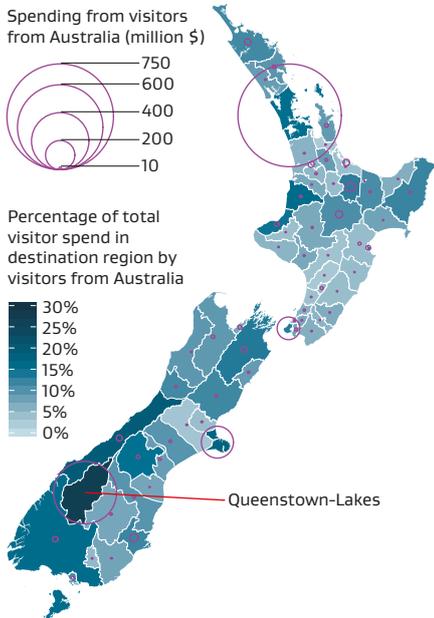
FIGURE 24 – INTERNATIONAL VISITOR SPEND AS PROPORTION OF TOTAL VISITOR SPEND IN EACH REGION 2014



Source: MBIE – Regional Tourism Estimates, year ending March 2014

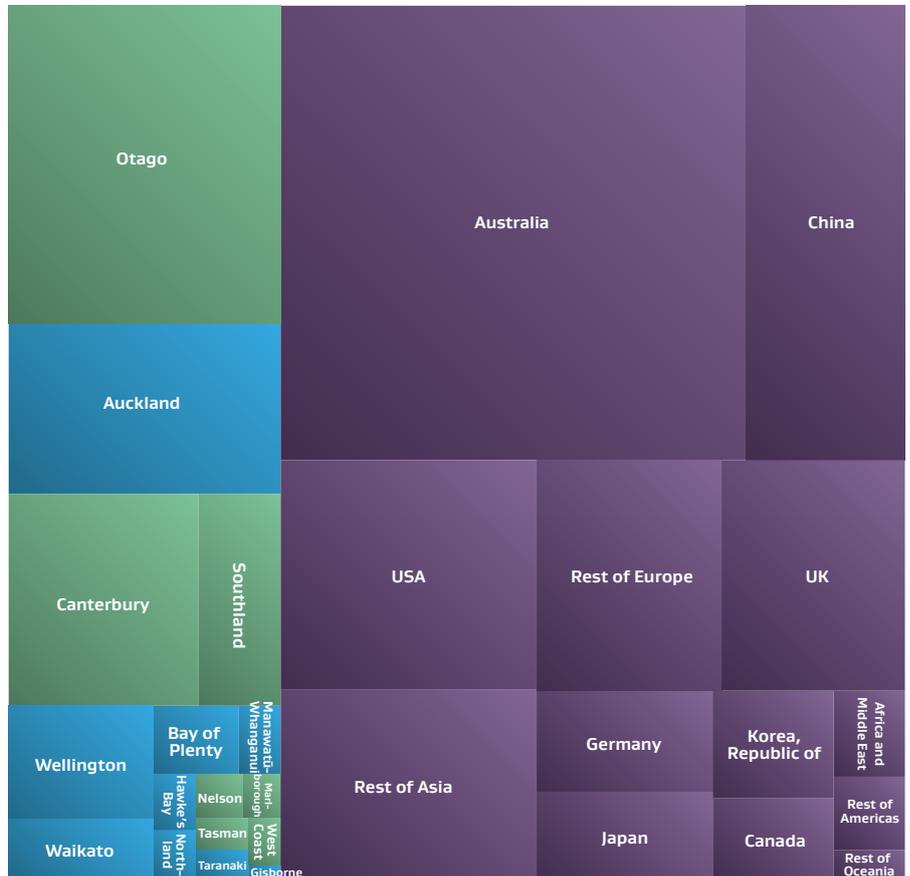
Highlight 1: Australia and Queenstown

FIGURE 25 – RELATIVE IMPORTANCE OF AUSTRALIAN VISITOR SPEND BY REGION 2014



Source: MBIE – Regional Tourism Estimates, year ending March 2014

FIGURE 26 – TOURISM SPEND BY ORIGIN OF VISITORS TO QUEENSTOWN 2014



Source: MBIE – Regional Tourism Estimates, year ending March 2014

The map shows the percentage of total visitor spend in each region by visitors from Australia, and the chart shows the proportions of international and domestic expenditure in Queenstown split between the origin visitor markets.

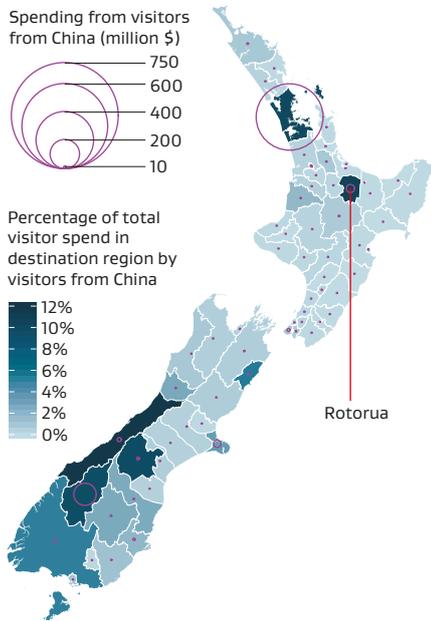
For Queenstown, Australia is the only direct connection for international flights, reflecting and reinforcing the particular importance of Australian visitors to this region. Australian visitors spent \$438.6 million in Queenstown in the year ending March 2014, making up 27 per cent of total tourism spend in the region. By international origin, this was followed by visitor spending from China (9.2 per cent of total spend), the USA

(7.5 per cent), the rest of Asia excluding China, Japan and Korea (6.2 per cent), the rest of Europe excluding the UK and Germany (5.5 per cent), and the UK (5.4 per cent).

Australian visitor spend is also very important to the regions surrounding Queenstown (especially the West Coast and Southland) and is still the largest international source of tourism dollars to all other New Zealand regions except Kaikoura (where the rest of Europe excluding the UK and Germany comprises 12.6 per cent of the total tourism spend, followed by the UK's 9.2 per cent, and then Australia's 8.7 per cent).

Highlight 2: China and Rotorua

FIGURE 27 – RELATIVE IMPORTANCE OF CHINESE VISITOR SPEND BY REGION 2014



Source: MBIE – Regional Tourism Estimates, year ending March 2014

FIGURE 28 – TOURISM SPEND BY ORIGIN OF VISITORS TO ROTORUA 2014



Source: MBIE – Regional Tourism Estimates

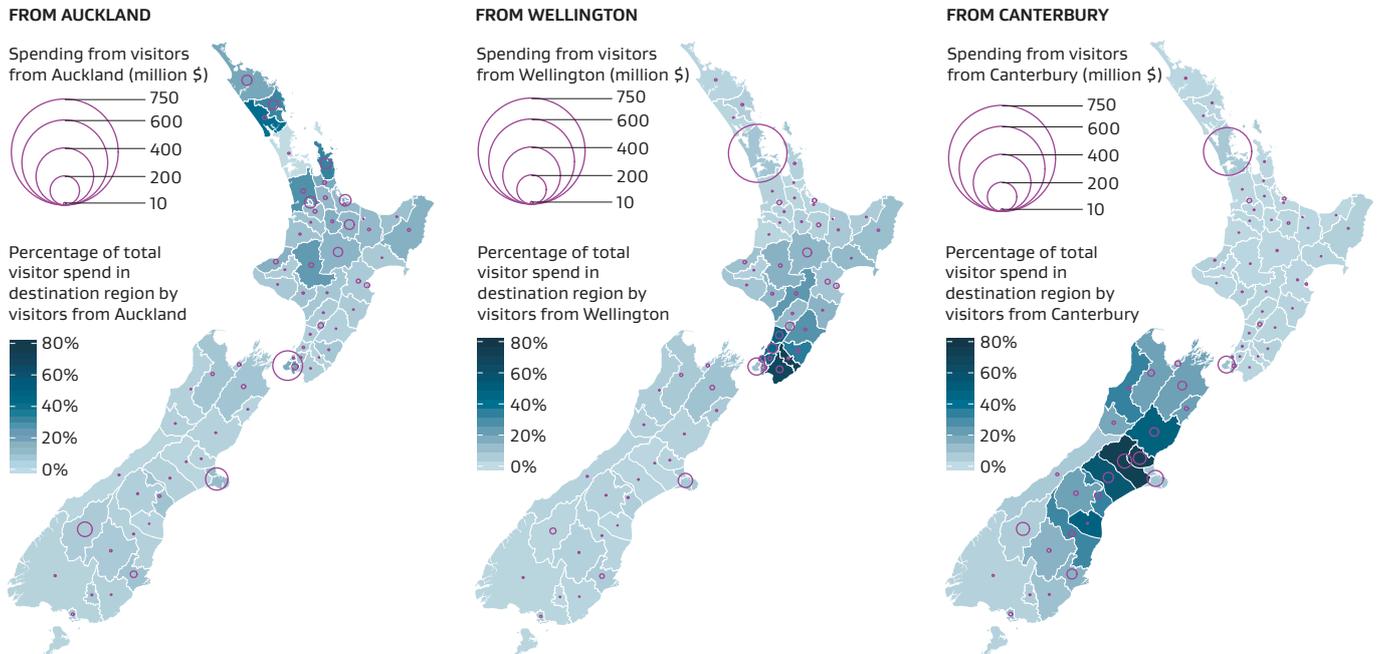
Chinese visitor spending is less dispersed regionally than spending by visitors from the UK, US, Europe and Australia. The Chinese tourism dollar is particularly important in Rotorua, where it made up 10.5 per cent of the \$468.3 million spent by visitors to Rotorua in 2014 (though still behind Australia's 12.9 per cent).

China has also become an important part of the total tourism spend in Auckland (9.8 per cent), Queenstown (9.2 per cent), and the West Coast (7.6 per cent).

Domestic Tourism Spend

The maps below show the percentage of total visitor spend in each region by visitors from the main centres of Auckland, Wellington, and Canterbury. They indicate the relative importance of the spends from the main centres in the regions and how dispersed they are.

FIGURE 29 – RELATIVE IMPORTANCE OF DOMESTIC TOURISM SPEND TO REGIONS BY TOURISTS FROM NEW ZEALAND'S MAIN CENTRES



Source: MBIE – Regional Tourism Estimates, year ending March 2014

Auckland is a key destination for visitors from all other regions, reflecting the importance of Auckland as a business and leisure destination. The regional share of domestic tourism dollars spent in Auckland reflects this wide pull, although the highest shares are naturally from the well-populated regions of Waikato, Wellington and Canterbury.

Of all domestic visitors, those from Auckland show the most regional dispersal across the country, though their spend is most important to Northland, Waikato, Ruapehu, Gisborne,

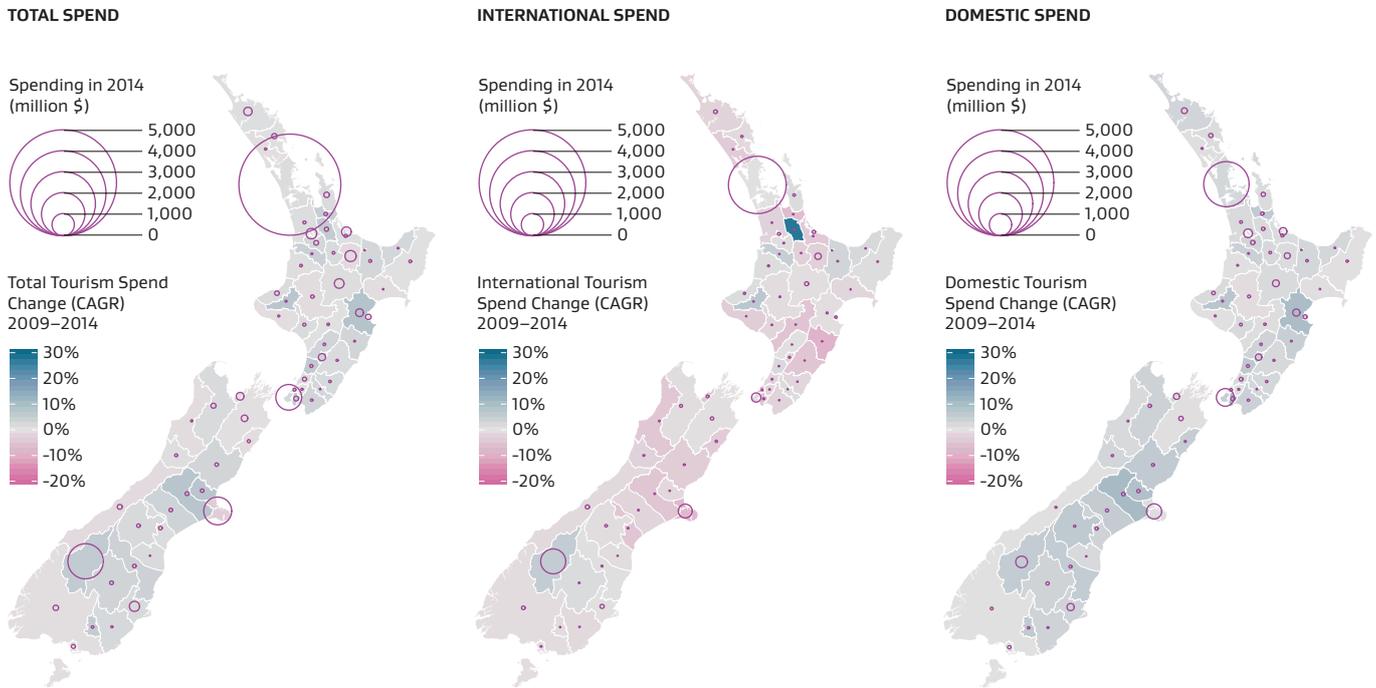
Wellington City, Christchurch, and Queenstown. As noted earlier, the total domestic tourism spend of Aucklanders is lower per capita than Wellington's and Canterbury's.

Most regions tend to get most of their domestic tourism from the residents of neighbouring regions, as well as from Auckland. For instance, the majority of spend of tourists from the Canterbury region tends to be in neighbouring districts, as well as in Auckland.

Growth in Regional Tourism

The maps below show the average annual growth (between 2009 and 2014) of visitor spend (total, international, and domestic) across the regions.

FIGURE 30 – ANNUAL GROWTH IN TOURISM SPEND 2009–2014



SOURCE: MBIE – Regional Tourism Estimates, March years

Growth in total tourism spend is characterised by strong negative growth in Christchurch City, due largely to reductions in the international spend, accompanied by strong positive growth in the neighbouring districts of Selwyn and Waimakiri due to growth in domestic spend in these regions. However, while Canterbury experienced negative spend growth from 2009 to 2013, growth was positive to 2014 and is likely to improve further, especially for Christchurch City.

Total tourism spend also shows solid growth for Hastings, Stratford, Horowhenua, Queenstown, and Matamata-Piako Districts.

Most of the growth in international spend occurred in the year to 2014. Particularly strong growth occurred in Matamata-Piako (36.5 per cent in the year ending March 2013, and 52.5 per cent in the year ending March 2014). Matamata-Piako

is the site of Hobbiton, the set used for the Lord of the Rings movie and The Hobbit: An Unexpected Journey (2012).

Growth in the domestic tourism spend can be a little more difficult to discern due to data collection issues currently under review¹. An obvious trend is growth in domestic spend for the neighbouring districts of Christchurch City (eg Selwyn and Waimakariri), reflecting the shifting dynamics of the Canterbury region post the earthquakes, which moved some of the retail and accommodation sector out of Christchurch City into the neighbouring districts.

¹ MBIE is conducting a review of the electronic card data used in the production of the Regional Tourism Estimates to further improve these data. Recommended improvements will be implemented in early 2016.

Importance of Tourism to Regional Economies

The maps below show the relative importance of international and domestic tourism spend to regional economies. Tourism spend is expressed as a proportion of modelled Territorial Authority (TA) GDP to indicate the relative strength of tourism between the regions.

FIGURE 31 – INTERNATIONAL TOURISM SPEND AS A PERCENTAGE OF TA GDP 2012

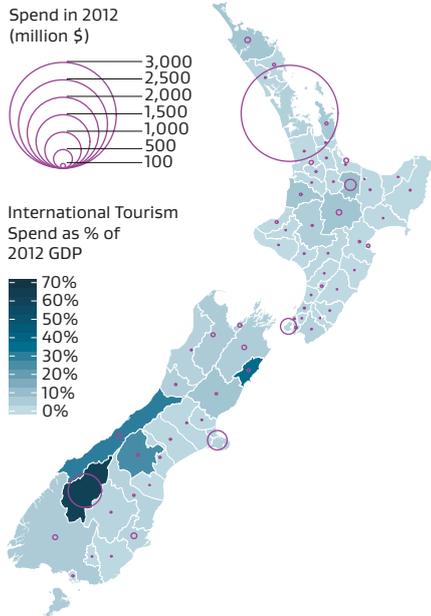
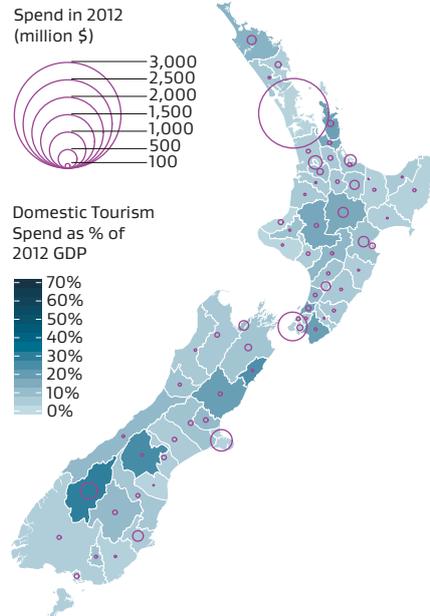


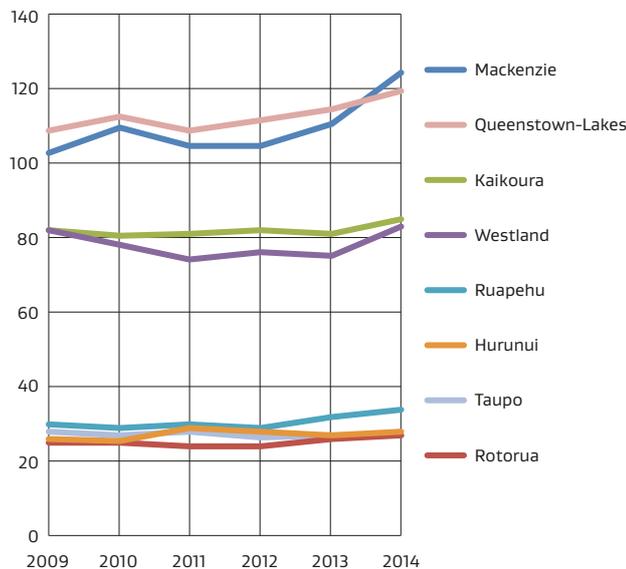
FIGURE 32 – DOMESTIC TOURISM SPEND AS A PERCENTAGE OF TA GDP 2012



As a percentage of modelled TA GDP estimates, international tourism spend is most important to the regions of Queenstown, Westland, Mackenzie, and Kaikoura. The same emphasis is reflected in the number of guest nights per resident population. Domestic tourism spend has a similar order of distribution, but the level of variation is not as pronounced.

SOURCE: MBIE – Regional Tourism Estimates and Modelled TA GDP estimates, year ending March 2012

FIGURE 33 – GUEST NIGHTS PER RESIDENT POPULATION – TOP 10 TAs



Queenstown is widely recognised as a key international tourist destination in New Zealand for its skiing and remarkable natural beauty. Mt Cook, in the Mackenzie region, is a strong drawcard for that region, but the high importance of international tourism also reflects the small population and the small local economy. The story is similar for the West Coast and Kaikoura, which have small economies with small populations and strong tourist attractions.

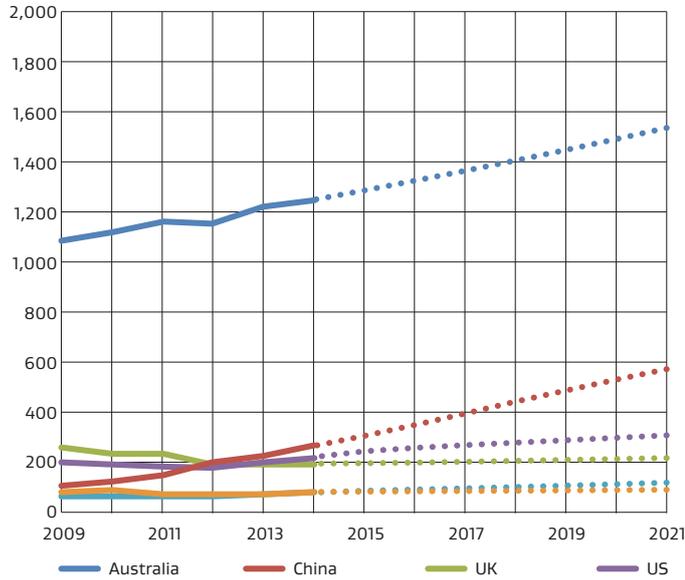
Source: Statistics New Zealand – Accommodation Survey and Sub-national Population Estimates, December years

Future Trends

New Zealand Tourism Forecasts 2015-2021

The two figures below show New Zealand tourism forecasts 2015-2021, for New Zealand’s key international markets.

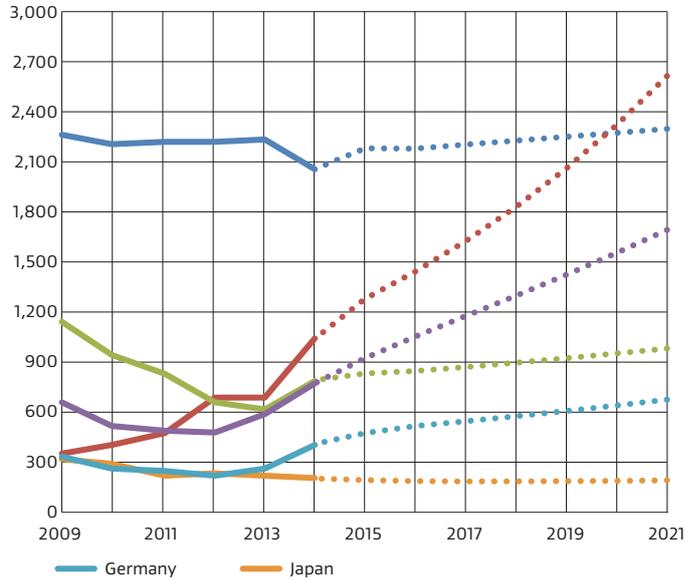
FIGURE 34 – NEW ZEALAND TOURISM FORECASTS – VISITOR ARRIVALS (000s)



SOURCE: Statistics New Zealand – International Visitor Arrivals, NZIER – tourism forecasting model

Australia will remain the top international visitor source for the foreseeable future, helping sustain Queenstown, Westland, and Southland in particular. China is growing quickly, and the forecasts estimate its spend will overtake Australia’s by 2020, buoyed by strongly increasing visitor numbers and an even stronger increase in spend per visitor. This strength will likely be reflected in the regions of importance to Chinese visitors – Rotorua, Westland, and Auckland, and the other key tourist destinations of Queenstown, Mackenzie and Southland.

FIGURE 35 – NEW ZEALAND TOURISM FORECASTS – VISITOR SPEND (\$m)



SOURCE: MBIE - International Visitor Survey, NZIER – tourism forecasting model

US spend is expected to recover strongly as its economy continues to recover, and the UK and Germany are expected to only moderately increase. Tourists from these countries have a more dispersed spend over New Zealand regions, and so the effect is not going to be felt acutely in any one region.

Overall the outlook is excellent, particularly for the key tourist regions and Auckland, based on a solid foundation of continuing Australian tourism to New Zealand, an exploding increase in the arrivals and spending of Chinese visitors, and powerful growth in the spending of visitors from the United States.



Appendices

Notes and sources

PAGE	FIGURE	TITLE	NOTES	SOURCE
REGIONAL ECONOMIC OUTCOMES				
8	1	EMPLOYMENT RATES AND EMPLOYMENT GROWTH	All figures are calculated for March years MBIE created employment estimates in order to include self-employed, and allow a finer level of sectoral disaggregation at regional and sub-regional levels. The estimates are based on the Linked Employer-Employee Data, with Business Demography Statistics used to improve the estimation method.	Statistics New Zealand, Household Labour Force Survey Ministry of Business Innovation and Employment, Detailed Regional Employment Estimates
9	2	HOUSEHOLD INCOME AND SKILLED OCCUPATIONS	All figures are calculated for March years Skilled occupations are defined according to NZSCO aggregations and include highly skilled (legislators, administrators and managers; professionals; technicians and associated professionals) and skilled occupations (clerks, service and sales workers)	Ministry of Business Innovation and Employment, Household Income Estimates Ministry of Business Innovation and Employment, Detailed Regional Employment Estimates
10	3	HOUSEHOLD INCOME AND PERCENTAGE OF POPULATION AGED 25-64 YEARS	All figures are calculated for March years	Ministry of Business Innovation and Employment, Household Income Estimates Statistics New Zealand, Sub-National Population Estimates
10	4	AVERAGE HOUSEHOLD INCOME AND RENT	All figures are calculated for March years	Ministry of Business Innovation and Employment, Household Income Estimates Ministry of Business Innovation and Employment, Bond Database
11	5	GDP PER CAPITA BY REGION	Data is for March 2012	Statistics New Zealand, Regional GDP
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	Summary figures	POPULATION		Statistics New Zealand, Sub-National Population Estimates
		GDP PER CAPITA		Statistics New Zealand, Regional GDP
		MEAN HOUSEHOLD INCOME		Ministry of Business Innovation and Employment, Household Income Estimates
		MEAN WEEKLY RENT		Ministry of Business Innovation and Employment, Bond Database
		EMPLOYMENT RATE		Statistics New Zealand, Household Labour Force Survey
		UNEMPLOYMENT RATE		Statistics New Zealand, Household Labour Force Survey
		HOUSEHOLD INCOME DISTRIBUTION		Ministry of Business Innovation and Employment, Household Income Estimates
		EMPLOYMENT BY INDUSTRY (CHART)		Ministry of Business Innovation and Employment, Detailed Regional Employment Estimates
		AREAS OF REGIONAL STRENGTH (TABLE)		Ministry of Business Innovation and Employment, Detailed Regional Employment Estimates
		SKILLS PIPELINE (CHARTS)		Ministry of Education, National Standards data
		LIVING STANDARDS (CHARTS)		Ministry of Business Innovation and Employment, Household Income Estimates Real Estate Institute of New Zealand, House Price Database Ministry of Business Innovation and Employment, Bond Database Statistics New Zealand, Household Labour Force Survey

PAGE	FIGURE	TITLE	NOTES	SOURCE
	Detailed figures	POPULATION		Statistics New Zealand, Sub-National Population Estimates
		SHARE OF POPULATION BY AGE		Statistics New Zealand, Sub-National Population Estimates
		MĀORI SHARE OF POPULATION		Statistics New Zealand, Sub-National Population Estimates
		NET INTERNATIONAL MIGRATION		Statistics New Zealand, Sub-National Population Estimates
		PROJECTED POPULATION GROWTH		Statistics New Zealand, Sub-National Population Projections
		DEPENDENCY RATIO		Statistics New Zealand, Sub-National Population Projections
		REGIONAL GDP		Statistics New Zealand, Regional GDP
		GDP PER CAPITA		Statistics New Zealand, Regional GDP
		MEAN HOUSEHOLD INCOME		Ministry of Business Innovation and Employment, Household Income Estimates
		MEAN HOUSE PRICE		Real Estate Institute of New Zealand, House Price Database
		MEAN WEEKLY RENT		Ministry of Business Innovation and Employment, Bond Database
		TOTAL EMPLOYMENT		Ministry of Business Innovation and Employment, Detailed Regional Employment Estimates
		EMPLOYMENT RATE		Statistics New Zealand, Household Labour Force Survey
		UNEMPLOYMENT RATE		Statistics New Zealand, Household Labour Force Survey
		LABOUR FORCE PARTICIPATION RATE		Statistics New Zealand, Household Labour Force Survey
		% OF 18 YEAR OLDS OBTAINING MINIMUM NCEA LEVEL 2		Ministry of Education, National Standards data
		NEET RATE		Statistics New Zealand, Household Labour Force Survey
		% OF 25–34 YEAR OLDS WITH LEVEL 4 QUALIFICATIONS OR HIGHER		Statistics New Zealand, Household Labour Force Survey
		SKILLED AND HIGHLY SKILLED JOBS AS A SHARE OF TOTAL EMPLOYMENT		Ministry of Business Innovation and Employment, Detailed Regional Employment Estimates
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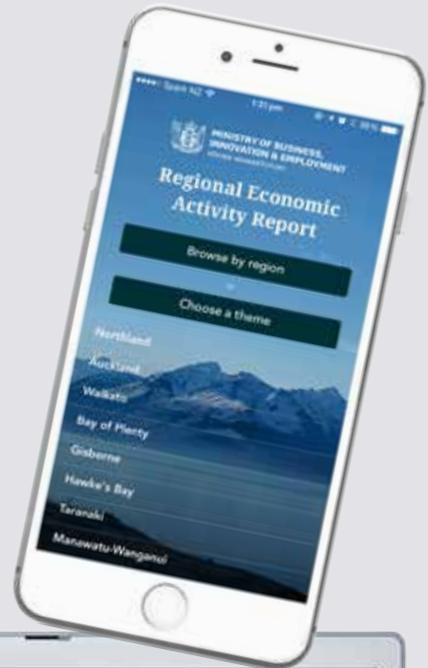
Regional information at your fingertips

The Regional Economic Activity Report mobile app for smartphones makes access to economic information on regions easy and immediate.

Key figures and charts quickly highlight essential data on household income, house prices, rents, employment rates, population and GDP. The charts put all this data in context, with time series illustrating trends, and theme screens allowing rapid comparison between regions. Anyone interested in finding out more about their region and other regions will find the mobile app highly informative and easy to use.

The Regional Economic Activity Report online web tool enables comparison of regional data in maps and dynamic charts. Exploration of the data is made easy by the many options the web tool gives for displaying and comparing it. Analysts and those wanting a more in-depth tool for exploring regional data will find the web tool highly useful.

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The web tool is available on the MBIE website:
<http://www.mbie.govt.nz/info-services/business/business-growth-agenda/regions>



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