Regional fact sheet: Canterbury
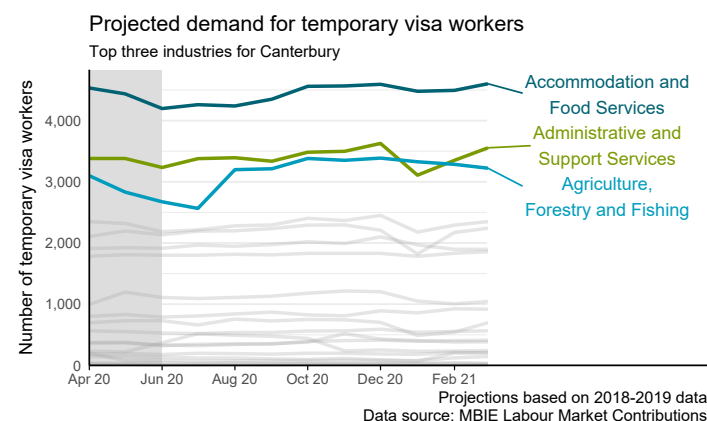
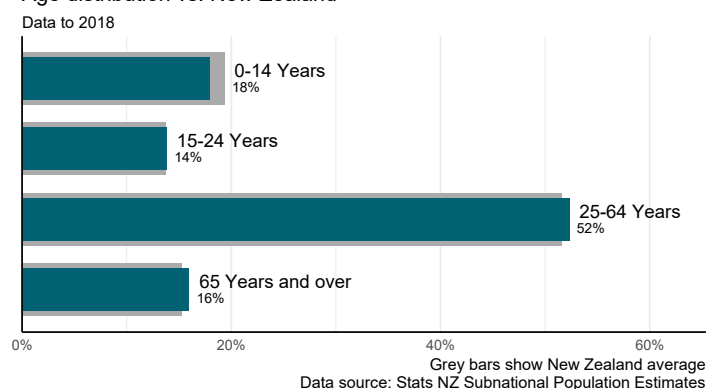|	Year	**Canterbury**	Marlborough	Otago	New Zealand
People					
Population	2018	**624,200**	46,600	229,200	4,885,500
Māori share of population	2018	**9%**	13%	9%	16%
Productivity					
GDP per capita	2018	**$57,216**	$65,037	$55,793	$58,271
Mean annual household income	2018	**$100,900**	$92,400	$95,100	$104,400
Median annual household income	2018	**$87,600**	$79,300	$89,400	$89,100
Employment					
Labour force participation	2019	**69.2%**	69%	70.9%	70.3%
Employment rate	2019	**66.6%**	66.7%	68.5%	67.4%
Unemployment rate	2019	**3.7%**	NA	3.3%	4.1%
NEET rate	2020	**10.2%**	11.7%	10.2%	15.1%
Housing					
Mean weekly rent	2020	**$387**	$396	$482	$482
Average house value	2019	**$511,679**	$505,596	$587,257	$705,638

Population

Canterbury is the second most populous region in New Zealand, as of 2018. Over the last 10 years, its population has grown by approximately 1 per cent per year.

Regional population
Data to 2018

Data source: Stats NZ National Population Estimates

Age distribution vs. New Zealand
Data to 2018

Grey bars show New Zealand average
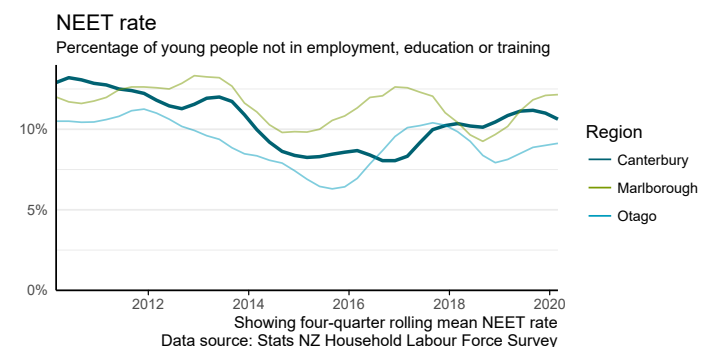Data source: Stats NZ Subnational Population Estimates

Migrant/seasonal workers make up approximately 8 per cent of Canterbury's workforce. Demand for temporary migrant workers is generally constant across the year.

Projected demand for temporary visa workers
Top three industries for Canterbury

Projections based on 2018-2019 data
Data source: MBIE Labour Market Contributions

Canterbury has approximately 8,500 young people not in education, employment, or training (NEETs).

NEET rate
Percentage of young people not in employment, education or training

Showing four-quarter rolling mean NEET rate
Data source: Stats NZ Household Labour Force Survey

Regional GDP

Canterbury comprises 13 per cent of New Zealand's total GDP, with an annual GDP of $35,392 million and a compound annual growth rate of 5 per cent per year (compared to the national growth rate of 6 per cent per year) over the past 10 years.
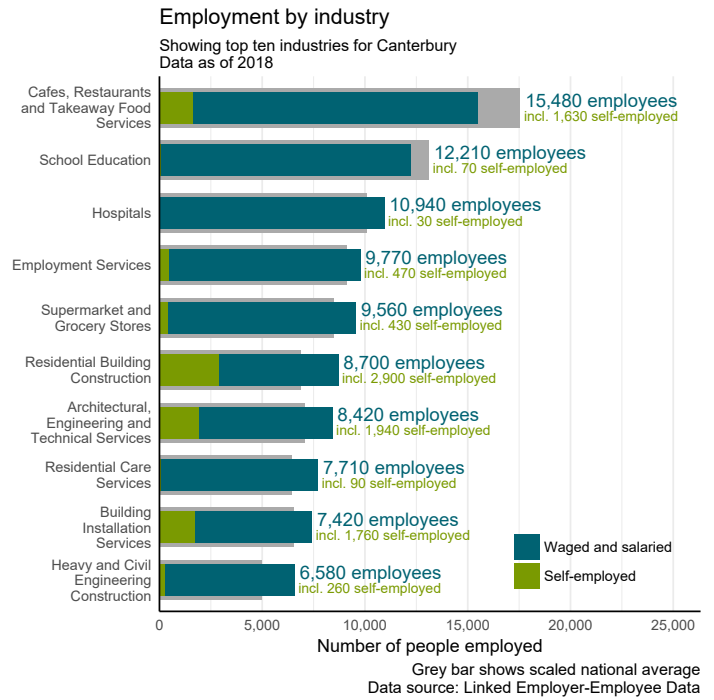
GDP per capita
Data to year ending March 2018

Data source: Stats NZ Regional GDP
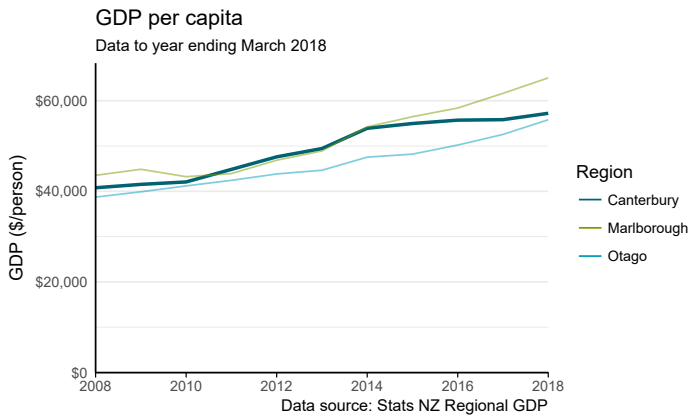
Regional GDP breakdown

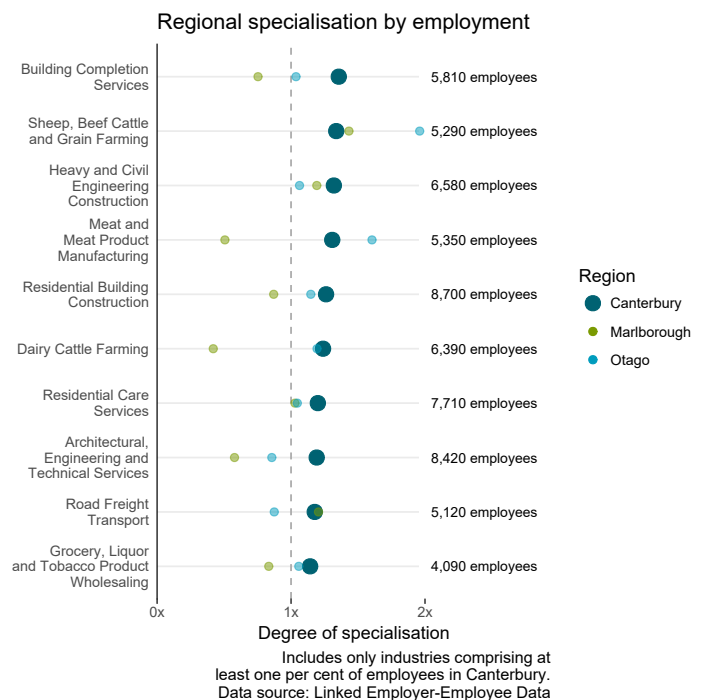|	RGDP	% region	% industry
Manufacturing	$3,725m	11%	14%
Construction	$3,140m	9%	19%
Professional, Scientific and Technical Services	$2,672m	8%	12%
Rental, Hiring and Real Estate Services	$2,429m	7%	12%
Owner-Occupied Property Operation	$2,325m	7%	14%
Health Care and Social Assistance	$2,099m	6%	13%
Agriculture	$2,006m	6%	18%
Transport, Postal and Warehousing	$1,709m	5%	13%
Retail Trade	$1,608m	5%	13%
Wholesale Trade	$1,596m	5%	12%
Forestry, Fishing, Mining, Electricity, Gas, Water and Waste Services	$1,547m	5%	11%
Information Media, Telecommunications and Other Services	$1,513m	4%	10%
Education and Training	$1,396m	4%	12%
Public Administration and Safety	$1,037m	3%	9%
Financial and Insurance Services	$846m	2%	6%
Administrative and Support Services	$519m	2%	10%
Food and beverage services	$489m	1%	12%
Accommodation	$244m	1%	14%

Here "% industry" measures what percentage of New Zealand's output in that industry is produced by firms in Canterbury.

Important industries

- The **Cafes, Restaurants and Takeaway Food Services** industry is the largest employer in Canterbury, comprising 4 per cent of all employees.
- The top three industries (by number of self-employed workers) in Canterbury are **Residential Building Construction** (2,900 self-employed), **Sheep, Beef Cattle and Grain Farming** (2,600 self-employed), and **Building Completion Services** (2,400 self-employed).

Employment by industry
Showing top ten industries for Canterbury
Data as of 2018

Grey bar shows scaled national average
Data source: Linked Employer-Employee Data

Regional specialisation is a measure of which industries are concentrated in Canterbury. If the region specialises in an industry, it means that the industry's share of employment in that region is higher than the industry's share of employment nationally.
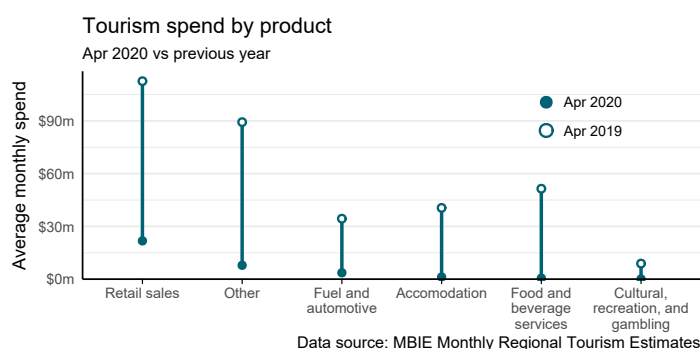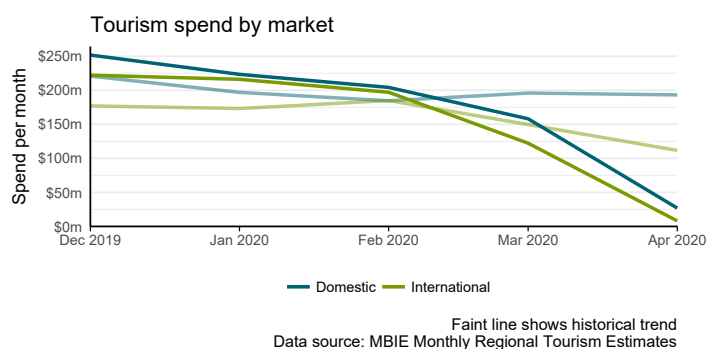
Regional specialisation by employment

Includes only industries comprising at least one per cent of employees in Canterbury.
Data source: Linked Employer-Employee Data

Spotlight on at-risk areas

In their recent report[1], the Organisation for Economic Co-operation and Development (OECD) identified a number of industries that are most likely to be hard-hit by quarantine measures as a result of COVID-19. Below, we present data on a subset of these industries.
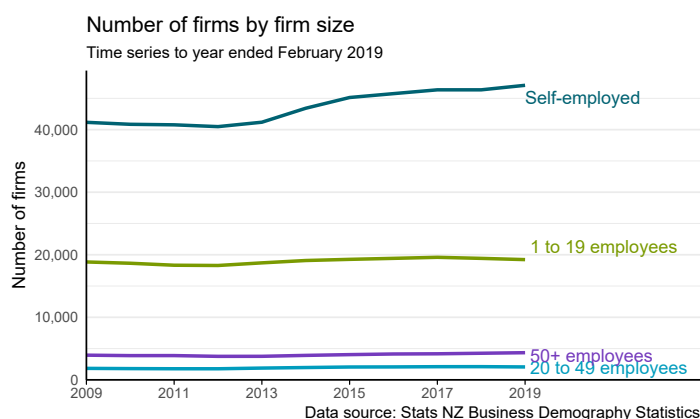
Tourism

Tourism expenditure in Canterbury totalled $3,640 million for the year ending April 2020, accounting for 13 per cent of national tourism expenditure. Over the past five years, tourism expenditure in the region has grown an average of 3 per cent, compared to the national growth rate of 4 per cent.

Tourism spend by market

Faint line shows historical trend
Data source: MBIE Monthly Regional Tourism Estimates

Tourism spend by product
Apr 2020 vs previous year

Data source: MBIE Monthly Regional Tourism Estimates

Small and medium enterprises

Canterbury contains 72,710 firms according to Stats NZ's Business Demography Statistics.

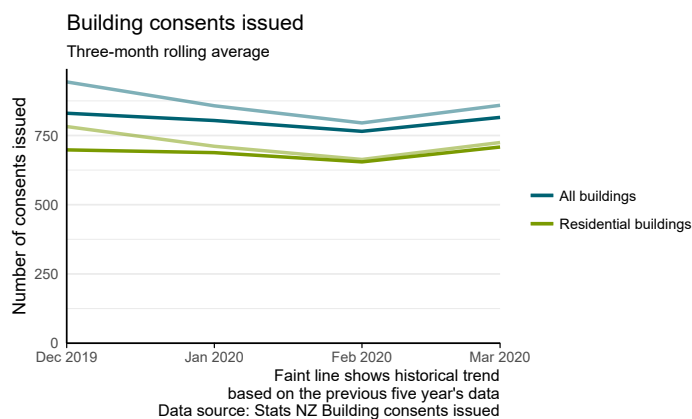| Firm size	Number of firms	% of region	National average
Self-employed	47,090	65%	67%
1 to 19	19,220	26%	25%
20 to 49	2,060	3%	3%
50+	4,340	6%	5%

Number of firms by firm size
Time series to year ended February 2019

Data source: Stats NZ Business Demography Statistics

Construction

860 building consents (for both new dwellings and alterations) were issued in Canterbury in the month of March, an increase of 10 per cent on the previous month.

Building consents offer a measure of intended activity in the building and construction sector. As well as providing insight into the health of the region's construction sector, this measure can also act as an indicator for regional growth.

Building consents issued
Three-month rolling average

Faint line shows historical trend
based on the previous five year's data
Data source: Stats NZ Building consents issued

[1] https://read.oecd-ilibrary.org/view/?ref=126_126496-evgsi2gmqj

Employment impact of COVID-19

Working by alert level

Under alert level four, Canterbury was operating at approximately 45 per cent capacity. National average capacity under level four was 44 per cent. The change to alert level three saw 82,000 more people travelling to work.
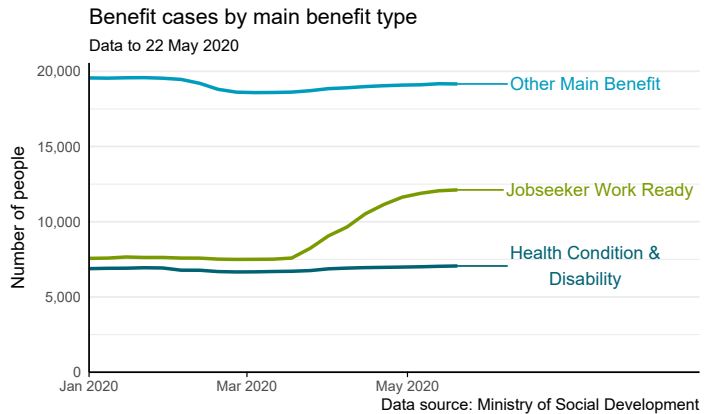
		Level four		Level three
	Essential	Non-essential	Total	
Going to work	74,000	NA	74,000	156,000
Working from home	18,000	61,000	79,000	63,000
Unable to work	59,000	130,000	189,000	123,000
Total	151,000	191,000	343,000	343,000

Working from home
79,000

Going to work
74,000

Unable to work
189,000

Alert level 4

Alert level 3

Going to work
156,000

Working from home
63,000

Unable to work
123,000
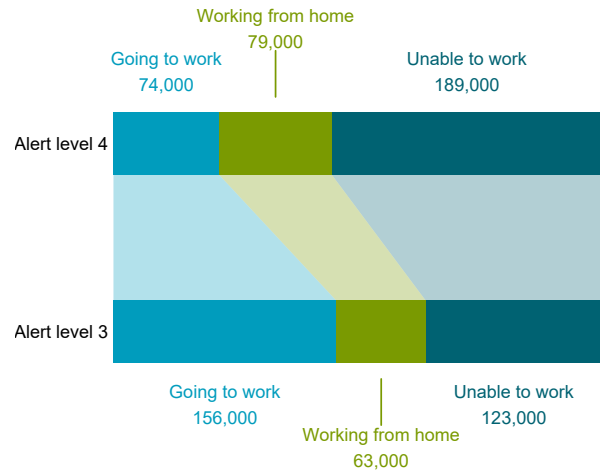
Estimated number of workers at each level.
Data source: MBIE Essential Services

Benefits and subsidies

At most recent count, 38,340 Jobseeker benefits were reported in Canterbury. This represents an increase of 24 per cent over this time last year.

Benefit cases by main benefit type
Data to 22 May 2020

Other Main Benefit

Jobseeker Work Ready

Health Condition & Disability

Number of people

Jan 2020 Mar 2020 May 2020

Data source: Ministry of Social Development

Dependence on other regions

Region dependence
Top five regions by imports and exports

Auckland
Wellington
Taranaki
Bay of Plenty
Waikato

Import
Export
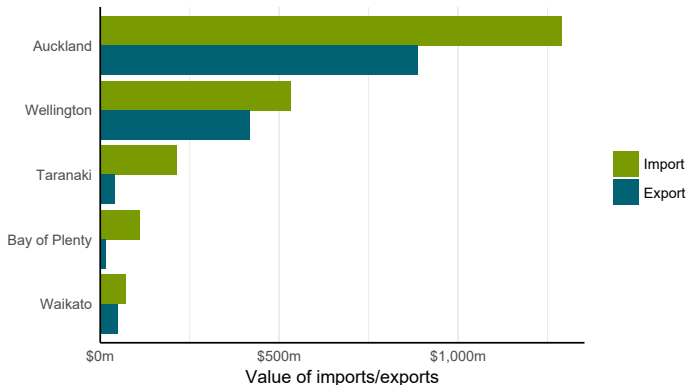
$0m $500m $1,000m
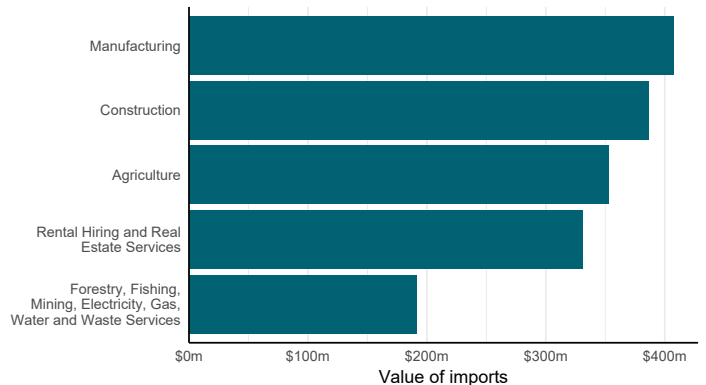Value of imports/exports
Does not include intra-sector flows
Data source: MBIE Regional IO Tables

Industries most dependent upon other regions
Showing top five industries by dependence on other regions

Manufacturing
Construction
Agriculture
Rental Hiring and Real Estate Services
Forestry, Fishing, Mining, Electricity, Gas, Water and Waste Services

$0m $100m $200m $300m $400m
Value of imports
Does not include intra-sector flows
Data source: MBIE Regional IO Tables

Canterbury is significantly less reliant than average on other regions. Firms in the region rely most heavily on Auckland for imports of goods and services, with 52 per cent of all imports coming from Auckland. In comparison, Wellington is most reliant of all regions on goods and services from firms in this region: 13 per cent of all its imports come from Canterbury.
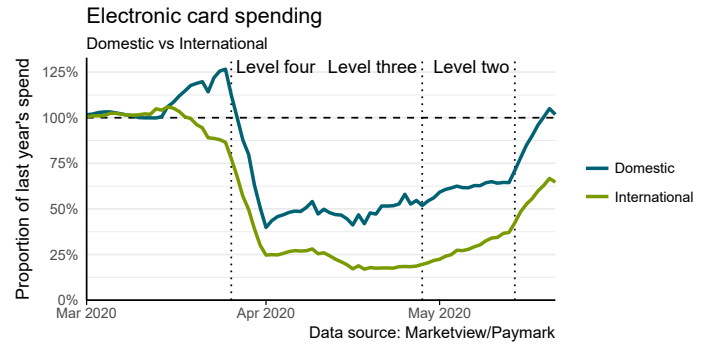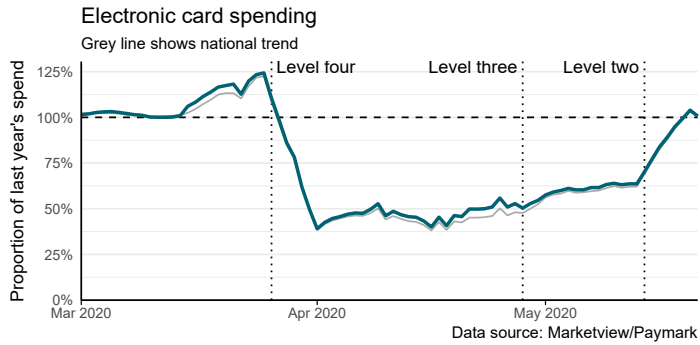
Tracking the recovery

Retail spending

Retail spending in Canterbury is estimated using electronic card consumer spend data supplied by Marketview/Paymark.

Total card spend currently sits at approximately 101 per cent of last year's levels. In comparison, national spending is currently 100 per cent of last year. Domestic spending sits at 102 per cent of last year's levels, while international spending sits at 65 per cent.

Electronic card spending
Grey line shows national trend

Electronic card spending
Domestic vs International

Data source: Marketview/Paymark

Spend patterns for selected industries are provided below.

Electronic card spending
By industry

Data source: Marketview/Paymark
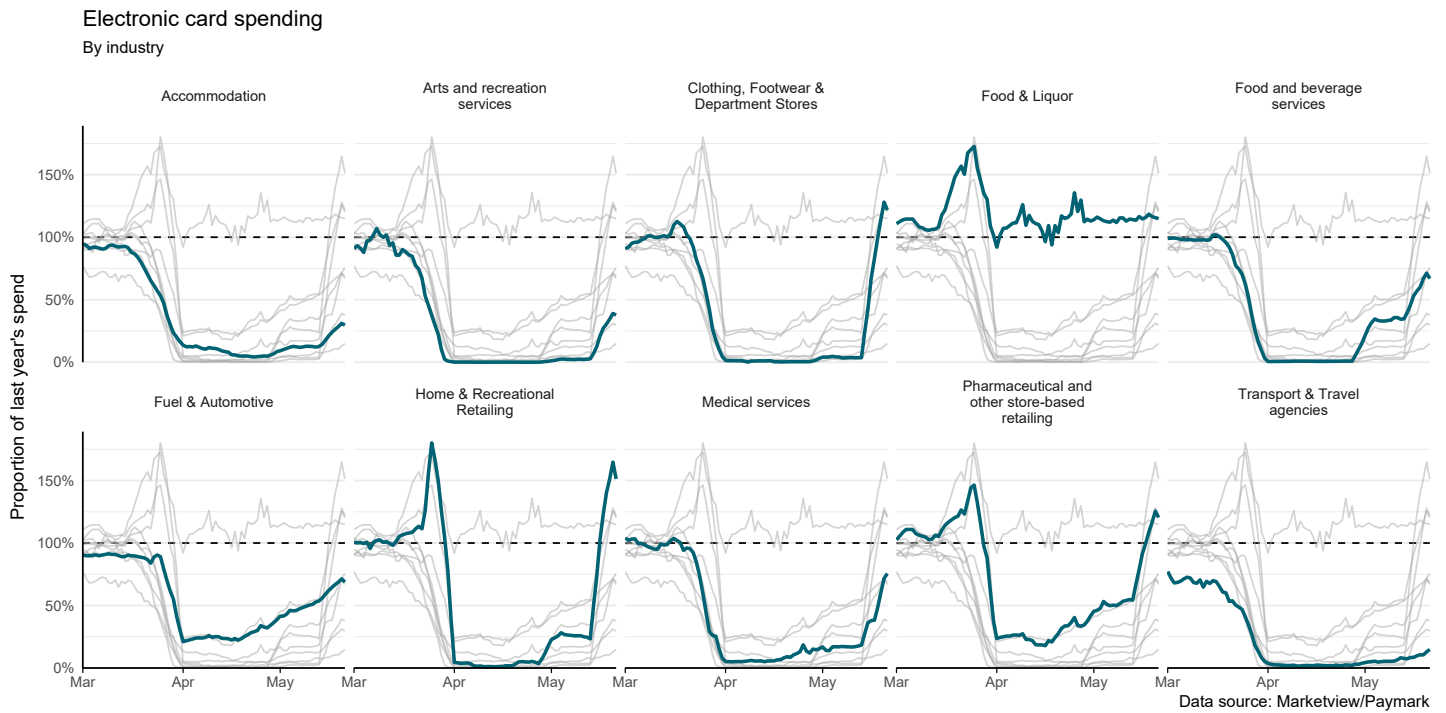
For further information on Marketview/Paymark spend data, please visit MBIE's retail spend dashboard[2].

Data sources and glossary

Stats NZ subnational population estimates

This data is provided by Stats NZ, and provides provisional estimates of the resident population for regional council and territorial authority areas in New Zealand.

Stats NZ Household Labour Force Survey

The Household Labour Force Survey (HLFS) provides New Zealand's official employment and unemployment statistics.

Stats NZ regional GDP calculations

This data is provided by Stats NZ, and is a geographic breakdown of national GDP presented in nominal terms. Regional GDP provides an indication of the size and structure of regional economies and provides a benchmark for measuring changes to regional economies over time.

MBIE Labour market contributions

Labour Market Contributions data is extracted from the Stats NZ IDI, and details the number of workers in each region and industry by visa and beneficiary status. The data includes employed people only, excluding self-employed and anyone not paid via PAYE payroll. Data provided here is suppressed in some cases, and random rounded to base three in all cases.

The results in this paper are not official statistics. They have been created for research purposes from the Integrated Data Infrastructure (IDI) managed by Statistics NZ. The opinions, findings, recommendations, and conclusions expressed in this paper are those of the author(s), not Statistics NZ. Access to the anonymised data used in this study was provided by Statistics NZ in accordance with security and confidentiality provisions of the Statistics Act 1975. Only people authorised by the Statistics Act 1975 are allowed to see data about a particular person, household, business, or organisation. The results in this paper have been confidentialised to protect these groups from identification. Careful consideration has been given to the privacy, security, and confidentiality issues associated with using administrative and survey data in the IDI. Further detail can be found in the Privacy impact assessment for the Integrated Data Infrastructure available from www.stats.govt.nz.

MBIE monthly regional tourism estimates

This data, published by MBIE, provides an estimate of regional monthly expenditure on tourism for both international and domestic consumers. The expenditure is modelled from electronic card transaction data representing approximately 60 per cent of all electronic transactions in New Zealand.

Linked employer-employee data

Linked Employer-Employee Data (LEED) data is taken from Stats NZ. It uses business and personal tax records to provide detailed estimates of the number of employees, both self-employed and waged-salaried.

MBIE essential services data

Essential services workforce estimates are taken from MBIE. The data provides estimates of the workforce by industries and regions under New Zealand COVID-19 alert levels three and four. The charts are based on Scenario two, which is a mid-range estimate by accounting for the expected reduction in worker demand due to such factors as lack of worker availability, reduced consumer demand, and the need to introduce new ways of working. For more information on MBIE's essential services estimates, please see our **Essential Services Workforce Fact Sheet**.

Ministry of Social Development benefits data

This data is provided by the Ministry of Social Development, and covers caseloads of *Jobseeker Support–Work Ready*, *Jobseeker Support–Health Condition and Disability*, and *Other Main Benefit* claimants by region. This can be used to monitor take up by individuals and households and is a proxy for the number of people unemployed.

Stats NZ Building consents data

This data is provided by Stats NZ and covers the number of building consents issued for both new buildings, and alterations to existing buildings, every month.

MBIE Regional Input/Output tables

This data provides an estimate of the flow of goods and services between sectors and regions within New Zealand.

Contact us

For further information on the data contained in this fact sheet, please email us: E&ICOVID-19EvidenceBase@mbie.govt.nz.

You can find further information on regional economic activity in MBIE's Regional Economic Activity Tools: https://www.mbie.govt.nz/nzregions.