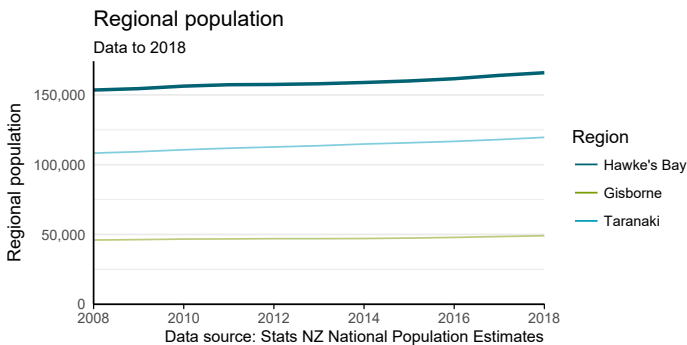


Regional fact sheet: Hawke's Bay

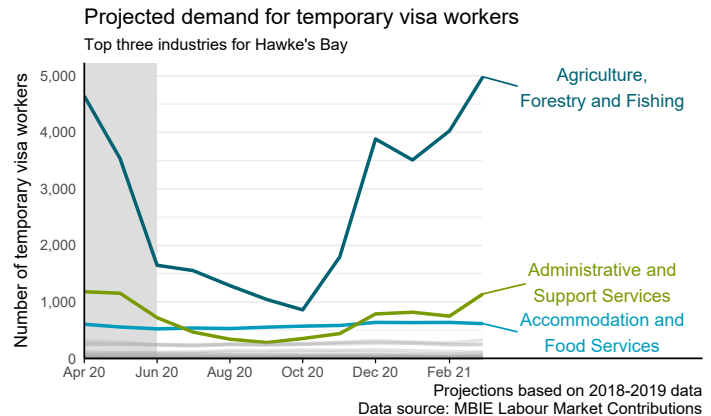
	Year	Hawke's Bay	Gisborne	Taranaki	New Zealand
People					
Population	2018	165,900	49,100	119,600	4,885,500
Māori share of population	2018	27%	53%	20%	16%
Productivity					
GDP per capita	2018	\$48,887	\$41,178	\$68,432	\$58,271
Mean annual household income	2018	\$86,700	\$82,800	\$91,100	\$104,400
Median annual household income	2018	\$77,700	\$74,200	\$75,000	\$89,100
Employment					
Labour force participation	2019	67.9%	71.5%	74.9%	70.3%
Employment rate	2019	64.8%	67.2%	71%	67.4%
Unemployment rate	2019	4.5%	6%	5.2%	4.1%
NEET rate	2020	14.8%	14.8%	17.3%	15.1%
Housing					
Mean weekly rent	2020	\$416	\$352	\$366	\$482
Average house value	2019	\$522,222	\$359,021	\$434,528	\$705,638

Population

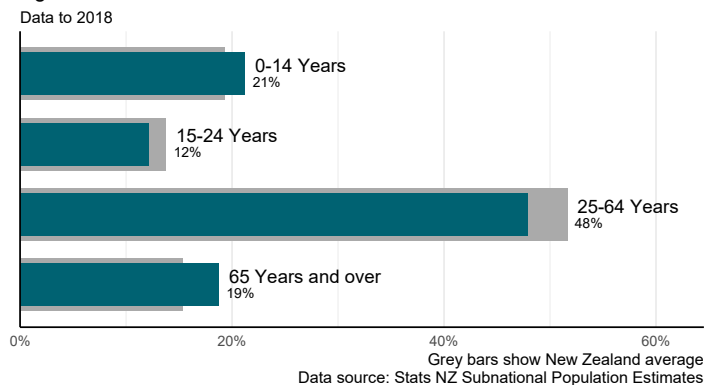
Over the last 10 years, Hawke's Bay's population has grown by approximately 1 per cent per year.



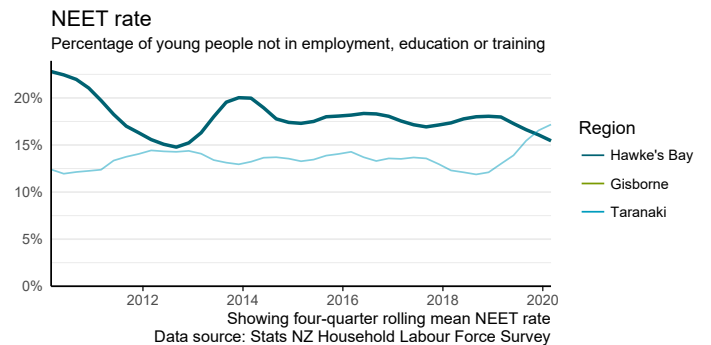
Migrant/seasonal workers make up approximately 7 per cent of Hawke's Bay's workforce. Demand for temporary migrant workers is highly seasonal, with highest demand occurring in March.



Age distribution vs. New Zealand

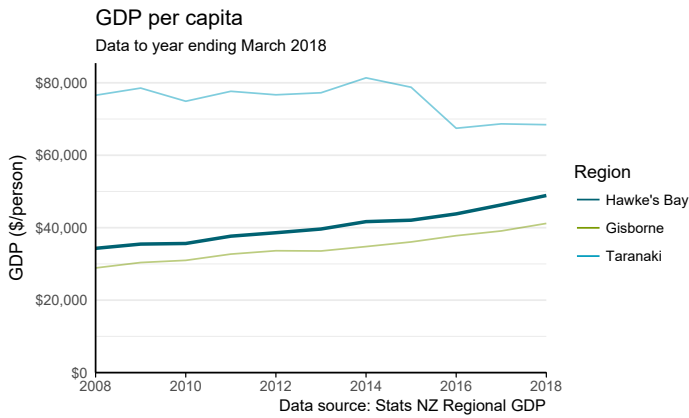


While NEET data is not available for Hawke's Bay, the estimated number of people not in education, employment, or training (NEETs) for Gisborne / Hawke's Bay is 3,700.



Regional GDP

Hawke's Bay comprises 3 per cent of New Zealand's total GDP, with an annual GDP of \$8,070 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.



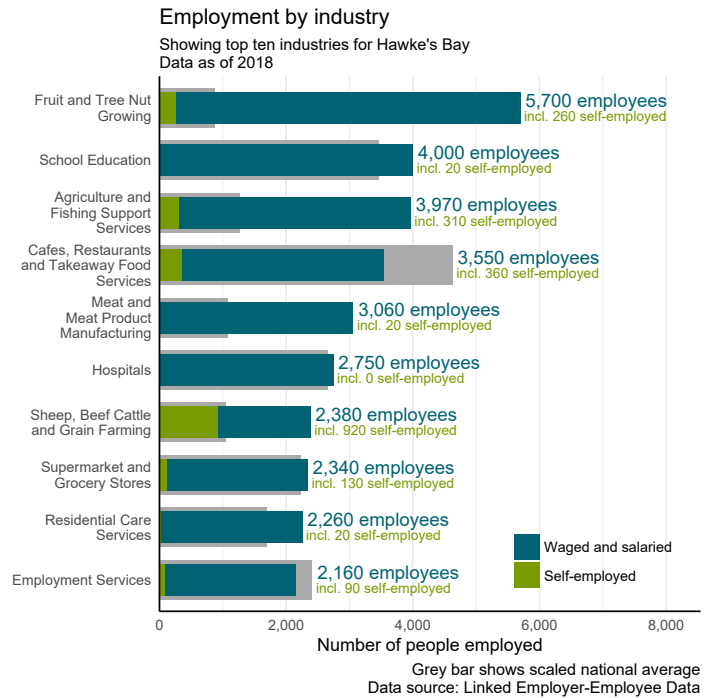
Regional GDP breakdown

Industry	RGDP	% region	% industry
Manufacturing	\$1,035m	14%	4%
Agriculture	\$707m	9%	6%
Rental, Hiring and Real Estate Services	\$555m	7%	3%
Health Care and Social Assistance	\$518m	7%	3%
Owner-Occupied Property Operation	\$517m	7%	3%
Forestry, Fishing, Mining, Electricity, Gas, Water and Waste Services	\$491m	7%	3%
Construction	\$442m	6%	3%
Retail Trade	\$376m	5%	3%
Professional, Scientific and Technical Services	\$354m	5%	2%
Transport, Postal and Warehousing	\$324m	4%	3%
Education and Training	\$315m	4%	3%
Wholesale Trade	\$262m	3%	2%
Information Media, Telecommunications and Other Services	\$245m	3%	2%
Public Administration and Safety	\$235m	3%	2%
Financial and Insurance Services	\$203m	3%	1%
Administrative and Support Services	\$151m	2%	3%
Food and beverage services	\$112m	1%	3%
Accommodation	\$42m	1%	2%

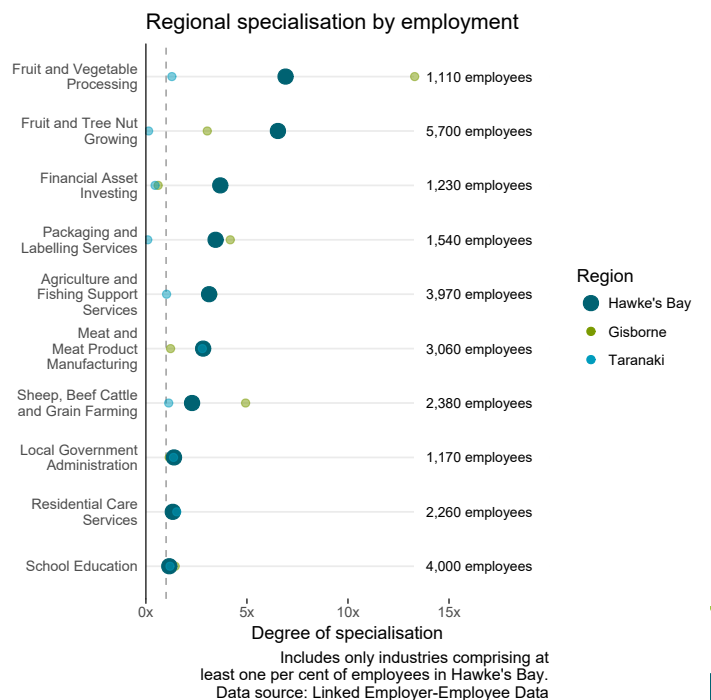
Here “% industry” measures what percentage of New Zealand's output in that industry is produced by firms in Hawke's Bay.

Important industries

- The **Fruit and Tree Nut Growing** industry is the largest employer in Hawke's Bay, comprising 6 per cent of all employees.
- The top three industries (by number of self-employed workers) in Hawke's Bay are **Sheep, Beef Cattle and Grain Farming** (900 self-employed), **Residential Building Construction** (500 self-employed), and **Management and Related Consulting Services** (500 self-employed).



Regional specialisation is a measure of which industries are concentrated in Hawke's Bay. 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.

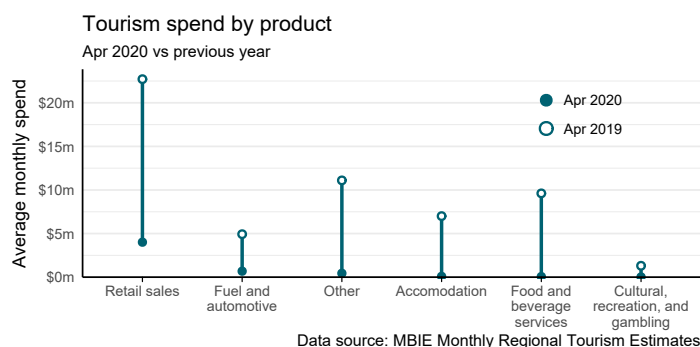
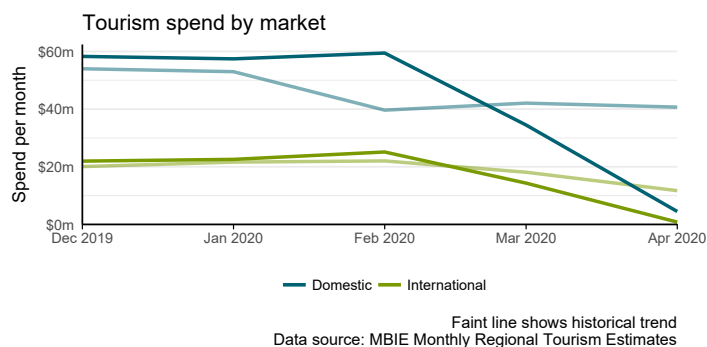


Spotlight on at-risk areas

In their recent report¹, 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

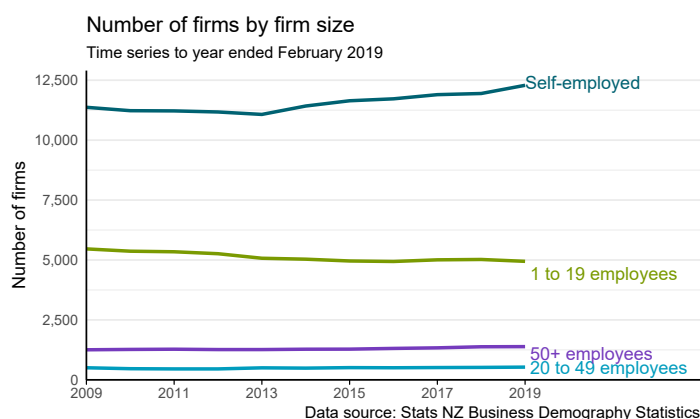
Tourism expenditure in Hawke's Bay totalled \$620 million for the year ending April 2020, accounting for 2 per cent of national tourism expenditure. Over the past five years, tourism expenditure in the region has grown an average of 3 per cent, compared to the national growth rate of 4 per cent.



Small and medium enterprises

Hawke's Bay contains 19,150 firms according to Stats NZ's Business Demography Statistics.

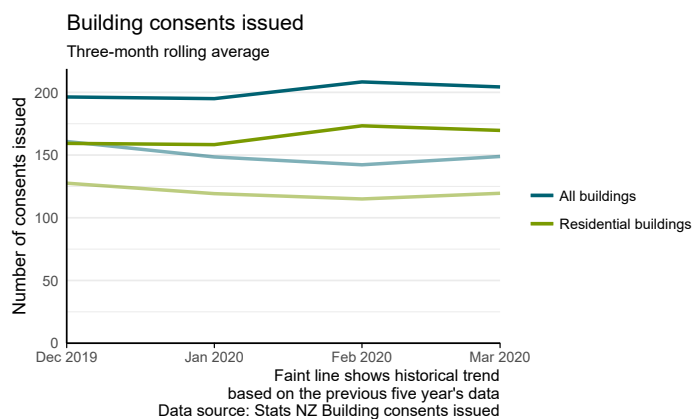
Firm size	Number of firms	% of region	National average
Self-employed	12,290	64%	67%
1 to 19	4,940	26%	25%
20 to 49	530	3%	3%
50+	1,390	7%	5%



Construction

160 building consents (for both new dwellings and alterations) were issued in Hawke's Bay in the month of March, a decrease of 37 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.



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

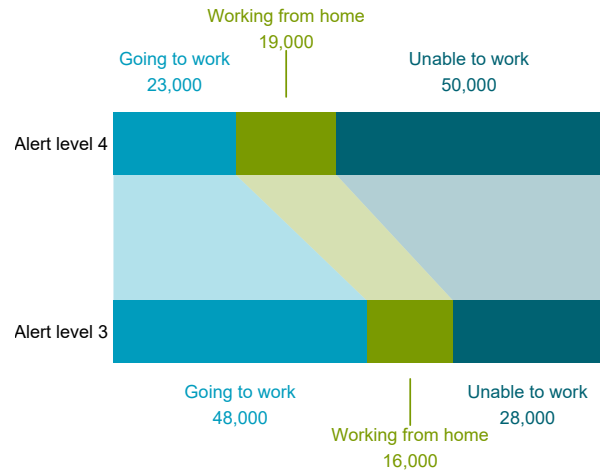


Employment impact of COVID-19

Working by alert level

Under alert level four, Hawke's Bay was operating at approximately 46 per cent capacity. National average capacity under level four was 44 per cent. The change to alert level three saw 25,000 more people travelling to work.

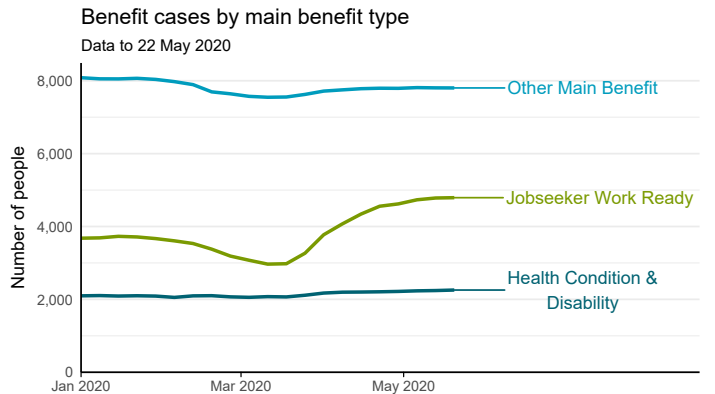
	Level four			Level three
	Essential	Non-essential	Total	
Going to work	23,000	NA	23,000	48,000
Working from home	5,000	14,000	19,000	16,000
Unable to work	19,000	31,000	50,000	28,000
Total	47,000	45,000	92,000	92,000



Estimated number of workers at each level.
Data source: MBIE Essential Services

Benefits and subsidies

At most recent count, 14,850 Jobseeker benefits were reported in Hawke's Bay. This represents an increase of 22 per cent over this time last year.

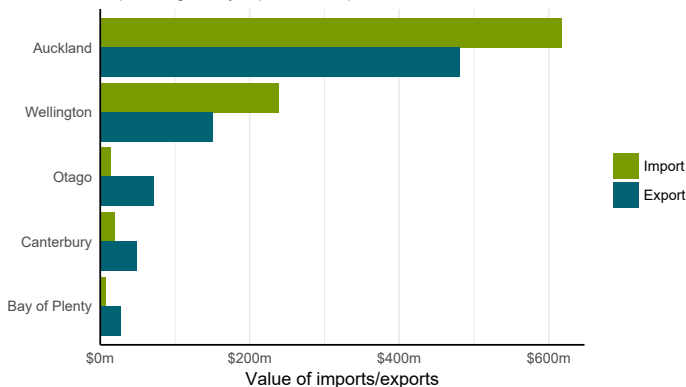


Data source: Ministry of Social Development

Dependence on other regions

Region dependence

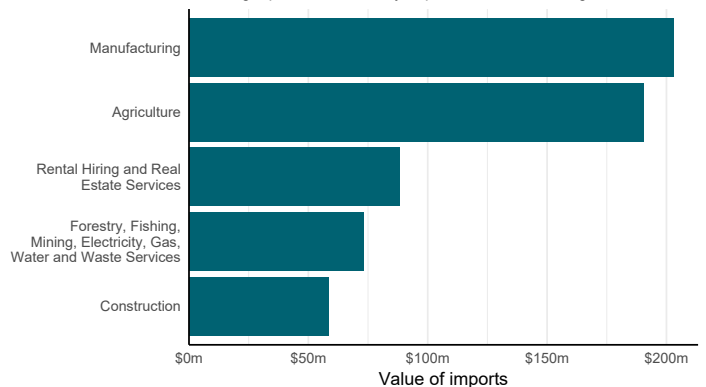
Top five regions by imports and exports



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



Does not include intra-sector flows
Data source: MBIE Regional IO Tables

Hawke's Bay is somewhat less reliant than average on other regions. Firms in the region rely most heavily on Auckland for imports of goods and services, with 66 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: 5 per cent of all its imports come from Hawke's Bay.

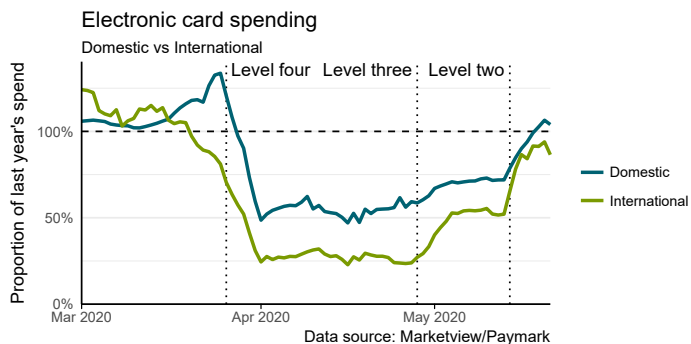
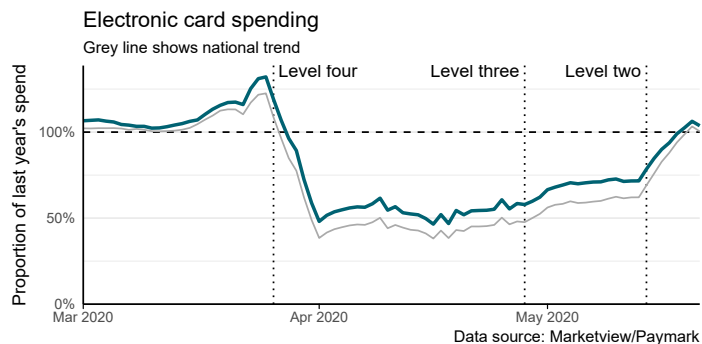


Tracking the recovery

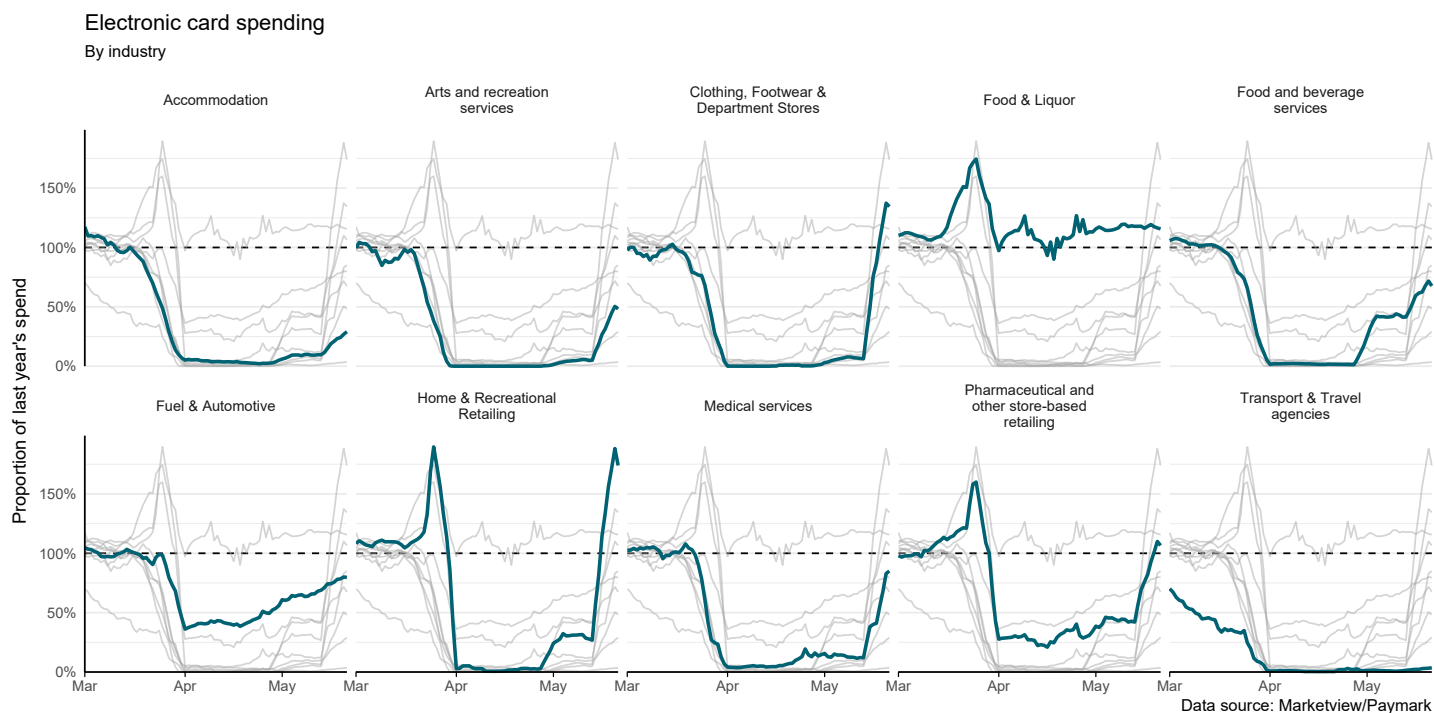
Retail spending

Retail spending in Hawke's Bay is estimated using electronic card consumer spend data supplied by Marketview/Paymark.

Total card spend currently sits at approximately 104 per cent of last year's levels. In comparison, national spending is currently 100 per cent of last year. Domestic spending sits at 104 per cent of last year's levels, while international spending sits at 86 per cent.



Spend patterns for selected industries are provided below.



For further information on Marketview/Paymark spend data, please visit MBIE's retail spend dashboard².

²https://mbienz.shinyapps.io/card_spend_covid19/



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.

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>.

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.

