

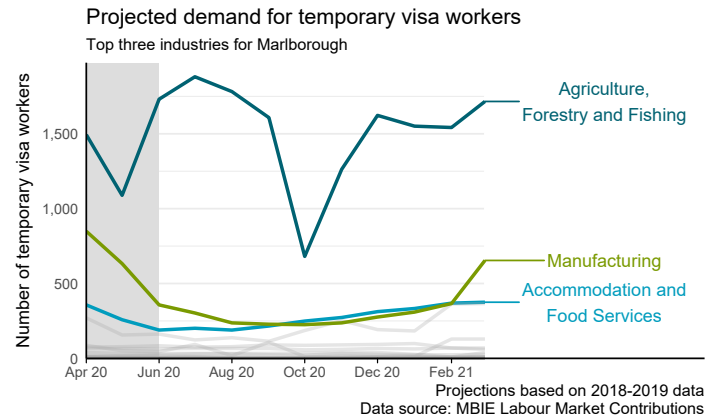
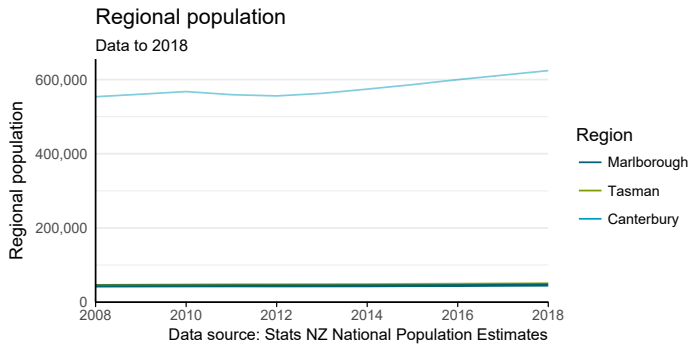
Regional fact sheet: Marlborough

	Year	Marlborough	Tasman	Canterbury	New Zealand
People					
Population	2018	46,600	52,100	624,200	4,885,500
Māori share of population	2018	13%	9%	9%	16%
Productivity					
GDP per capita	2018	\$65,037	\$44,129	\$57,216	\$58,271
Mean annual household income	2018	\$92,400	\$91,200	\$100,900	\$104,400
Median annual household income	2018	\$79,300	\$78,200	\$87,600	\$89,100
Employment					
Labour force participation	2019	69%	71.2%	69.2%	70.3%
Employment rate	2019	66.7%	68.9%	66.6%	67.4%
Unemployment rate	2019	NA	3.3%	3.7%	4.1%
NEET rate	2020	11.7%	11.7%	10.2%	15.1%
Housing					
Mean weekly rent	2020	\$396	\$415	\$387	\$482
Average house value	2019	\$505,596	\$684,487	\$511,679	\$705,638

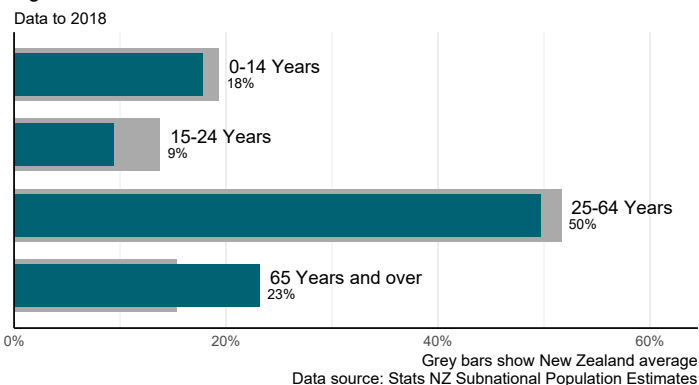
Population

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

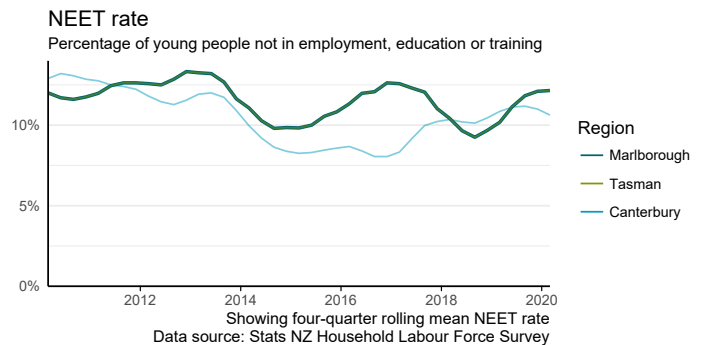
Migrant/seasonal workers make up approximately 12 per cent of Marlborough's workforce. Demand for temporary migrant workers is highly seasonal, with highest demand occurring in March.



Age distribution vs. New Zealand

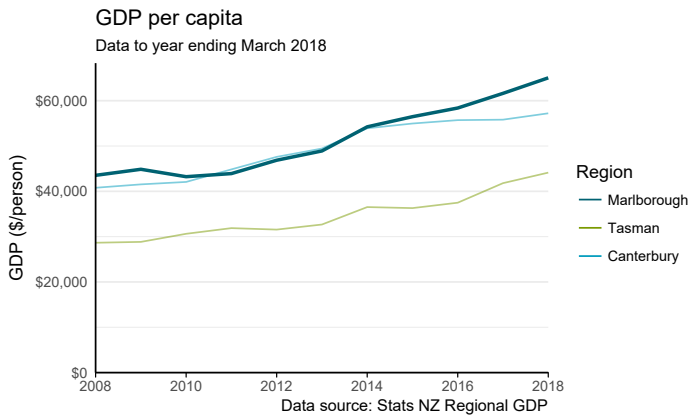


While NEET data is not available for Marlborough, the estimated number of people not in education, employment, or training (NEETs) for Nelson / Tasman / Marlborough / West Coast is 2,500.



Regional GDP

Marlborough comprises 1 per cent of New Zealand's total GDP, with an annual GDP of \$3,020 million and a compound annual growth rate of 7 per cent per year (compared to the national growth rate of 6 per cent per year) over the past 10 years.



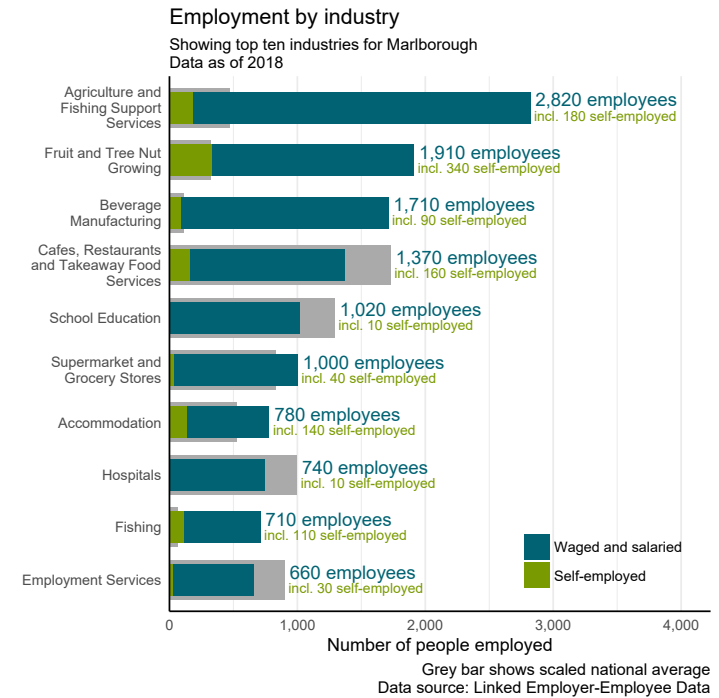
Regional GDP breakdown

Industry	RGDP	% region	% industry
Manufacturing	\$519m	18%	2%
Agriculture	\$357m	13%	3%
Forestry, Fishing, Mining, Electricity, Gas, Water and Waste Services	\$276m	10%	2%
Owner-Occupied Property Operation	\$191m	7%	1%
Rental, Hiring and Real Estate Services	\$188m	7%	1%
Construction	\$158m	6%	1%
Health Care and Social Assistance	\$129m	5%	1%
Retail Trade	\$121m	4%	1%
Transport, Postal and Warehousing	\$111m	4%	1%
Public Administration and Safety	\$90m	3%	1%
Professional, Scientific and Technical Services	\$80m	3%	0%
Information Media, Telecommunications and Other Services	\$79m	3%	1%
Education and Training	\$64m	2%	1%
Financial and Insurance Services	\$56m	2%	0%
Administrative and Support Services	\$51m	2%	1%
Wholesale Trade	\$47m	2%	0%
Food and beverage services	\$37m	1%	1%
Accommodation	\$26m	1%	1%

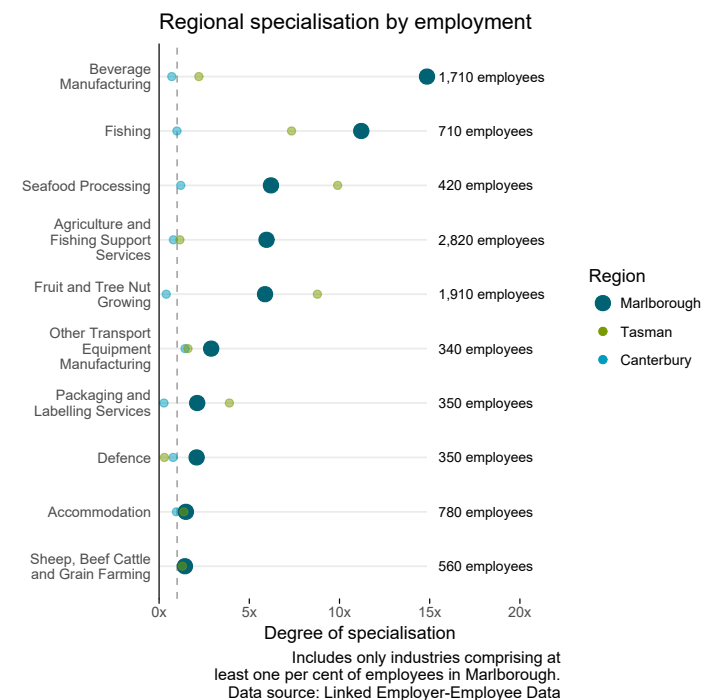
Here “% industry” measures what percentage of New Zealand's output in that industry is produced by firms in Marlborough.

Important industries

- The **Agriculture and Fishing Support Services** industry is the largest employer in Marlborough, comprising 8 per cent of all employees.
- The top three industries (by number of self-employed workers) in Marlborough are **Fruit and Tree Nut Growing** (300 self-employed), **Sheep, Beef Cattle and Grain Farming** (300 self-employed), and **Residential Building Construction** (300 self-employed).



Regional specialisation is a measure of which industries are concentrated in Marlborough. 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.

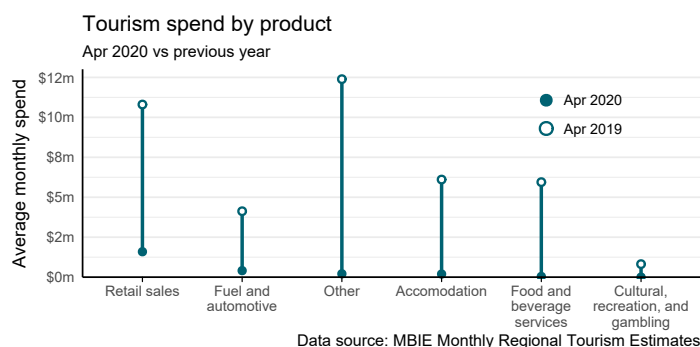
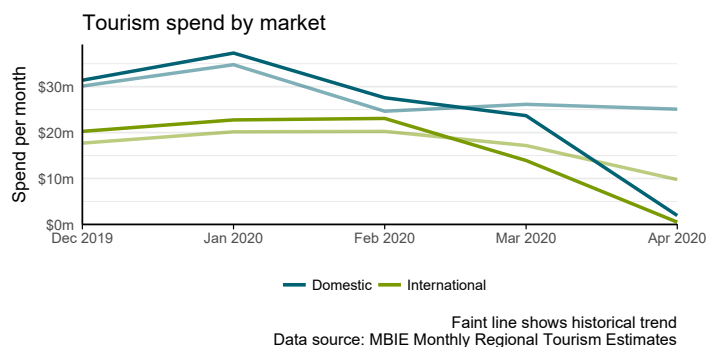


Spotlight on at-risk areas

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

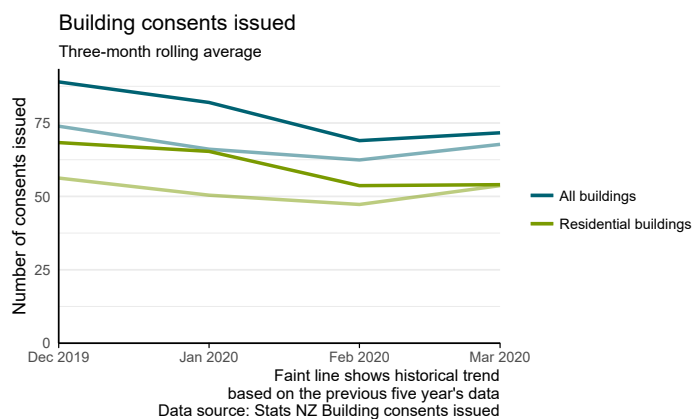
Tourism expenditure in Marlborough totalled \$370 million for the year ending April 2020, accounting for 1 per cent of national tourism expenditure. Over the past five years, tourism expenditure in the region has grown an average of 1 per cent, compared to the national growth rate of 4 per cent.



Construction

80 building consents (for both new dwellings and alterations) were issued in Marlborough in the month of March, an increase of 33 per cent on the previous month.

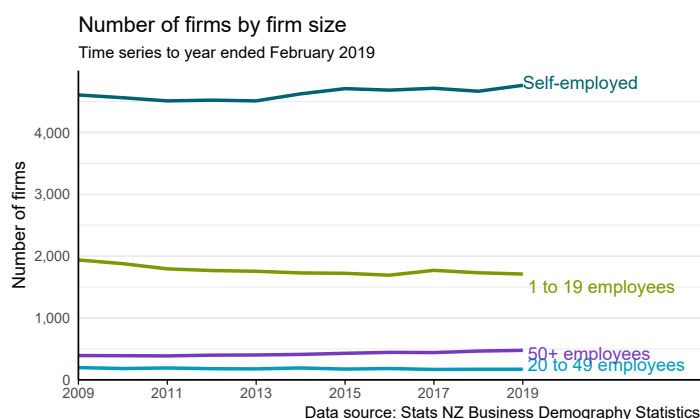
Building consents offer a measure of intended activity in the building and construction sector. As well as providing insight into the health of the region's construction sector, this measure can also act as an indicator for regional growth.



Small and medium enterprises

Marlborough contains 7,120 firms according to Stats NZ's Business Demography Statistics.

Firm size	Number of firms	% of region	National average
Self-employed	4,760	67%	67%
1 to 19	1,710	24%	25%
20 to 49	170	2%	3%
50+	480	7%	5%



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

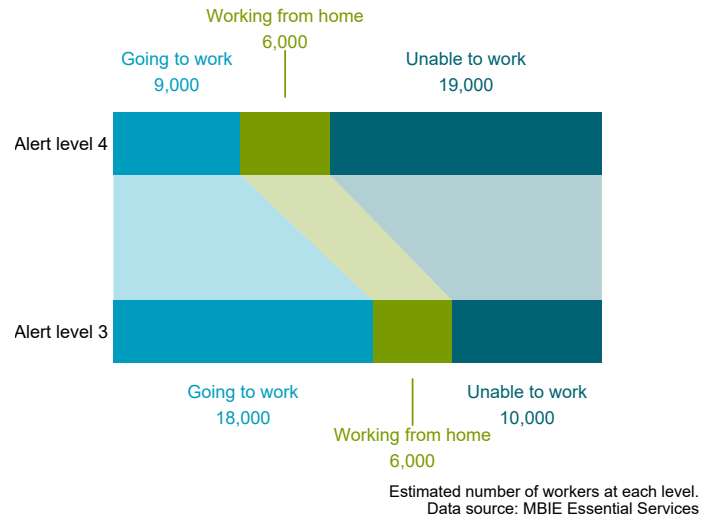


Employment impact of COVID-19

Working by alert level

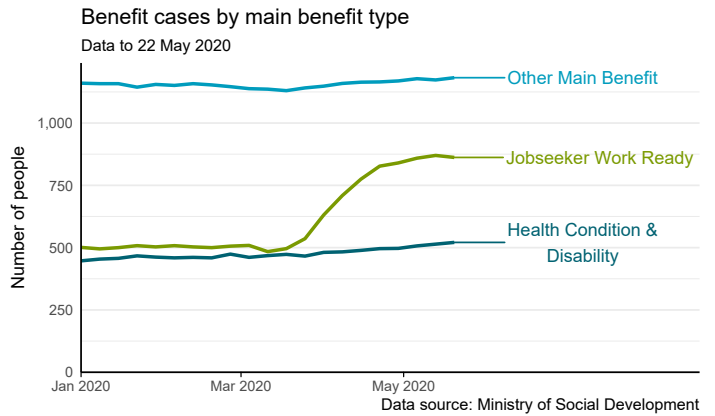
Under alert level four, Marlborough was operating at approximately 44 per cent capacity. National average capacity under level four was 44 per cent. The change to alert level three saw 9,000 more people travelling to work.

	Level four			Level three
	Essential	Non-essential	Total	
Going to work	9,000	NA	9,000	18,000
Working from home	2,000	4,000	6,000	6,000
Unable to work	8,000	11,000	19,000	10,000
Total	19,000	15,000	34,000	34,000

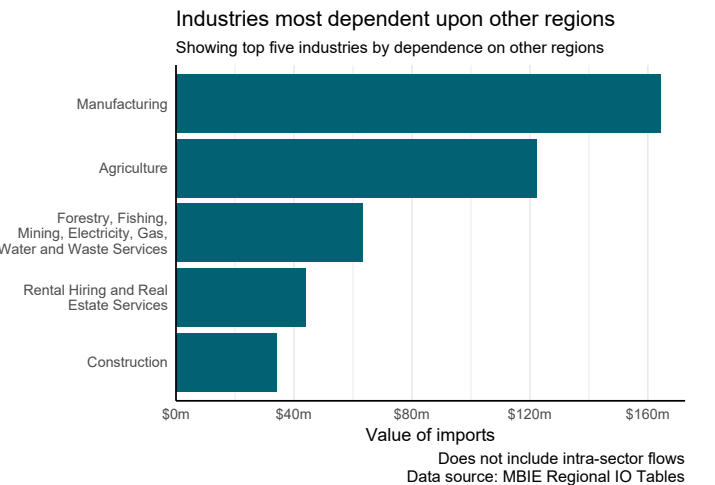
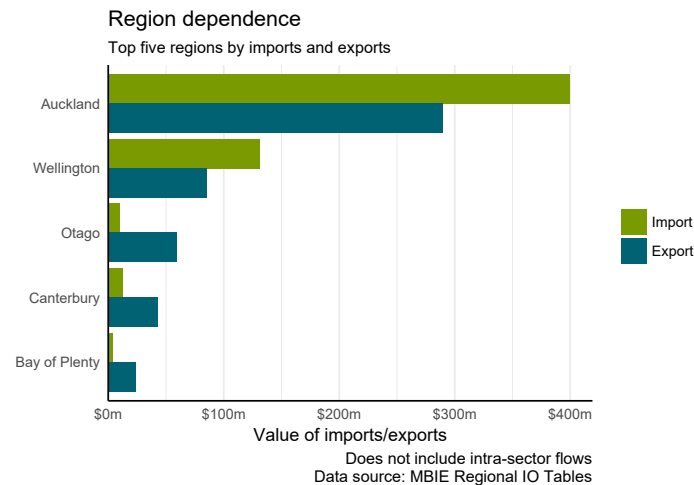


Benefits and subsidies

At most recent count, 2,560 Jobseeker benefits were reported in Marlborough. This represents an increase of 26 per cent over this time last year.



Dependence on other regions



Marlborough is somewhat more reliant than average on other regions. Firms in the region rely most heavily on Auckland for imports of goods and services, with 70 per cent of all imports coming from Auckland. In comparison, Otago is most reliant of all regions on goods and services from firms in this region: 4 per cent of all its imports come from Marlborough.

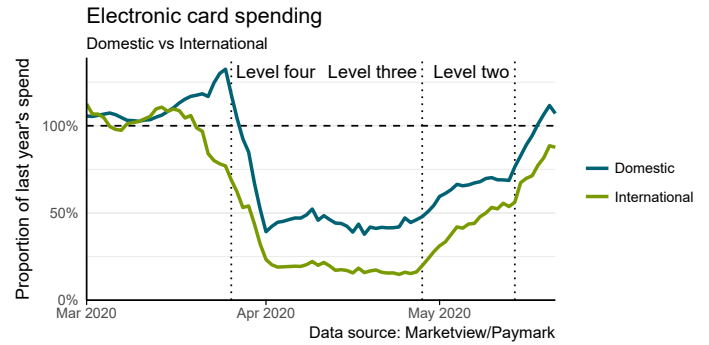
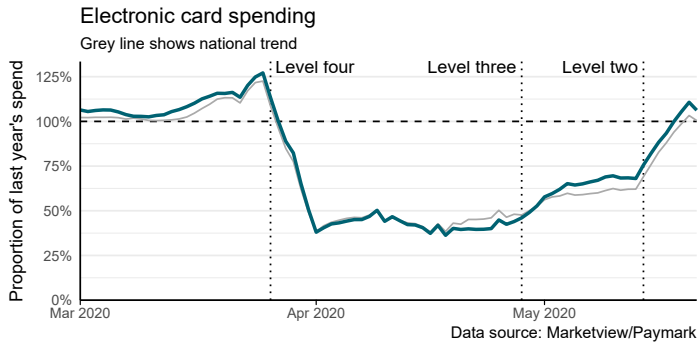


Tracking the recovery

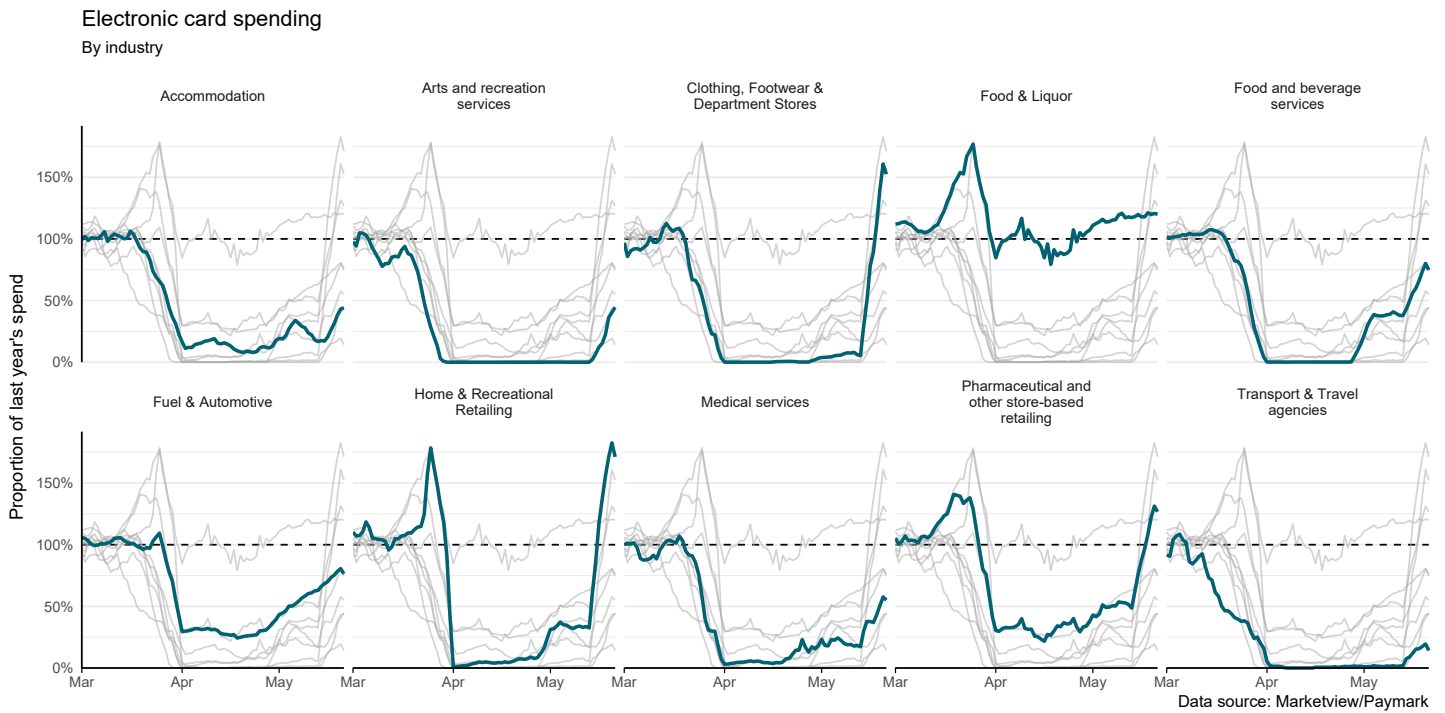
Retail spending

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

Total card spend currently sits at approximately 106 per cent of last year's levels. In comparison, national spending is currently 100 per cent of last year. Domestic spending sits at 107 per cent of last year's levels, while international spending sits at 88 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.

