

# 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

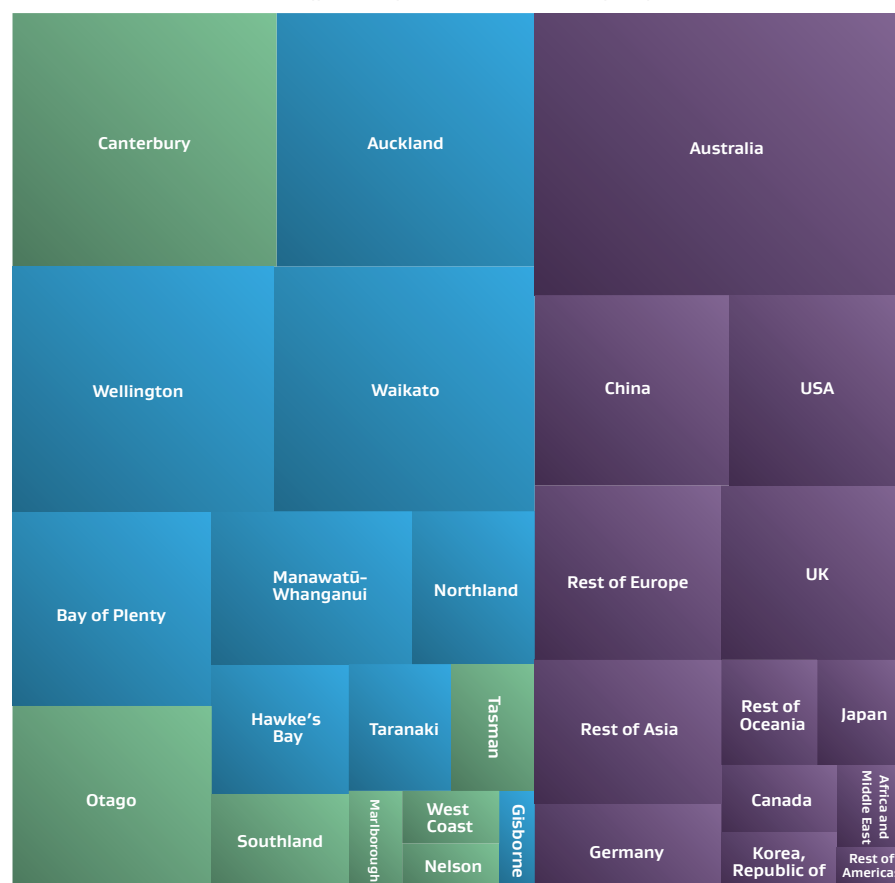
Australia remains the largest international market for spend, with China following in second place, followed by the USA and UK. Visitors from the main centres of Auckland, Canterbury, Wellington and Waikato make up a large majority of domestic visitor spend into the economy.

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).

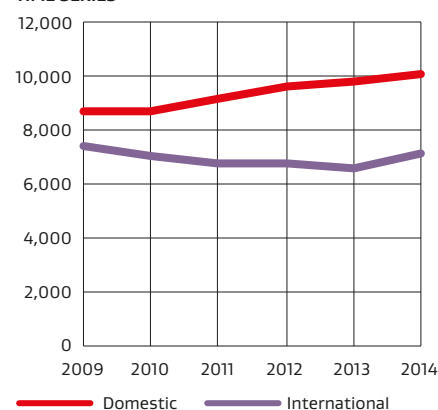
The figures below show the proportions of international and domestic expenditure split between the origin visitor markets, and the trend in total tourism spend from 2009 to 2014.

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



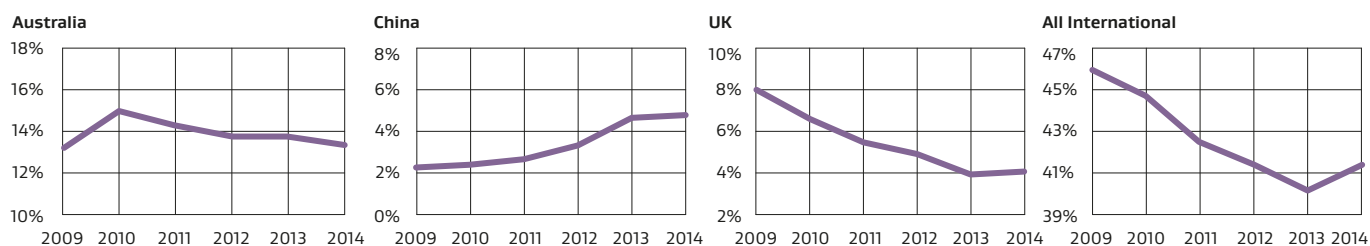
Source: MBIE – Regional Tourism Estimates, year ending March 2014

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



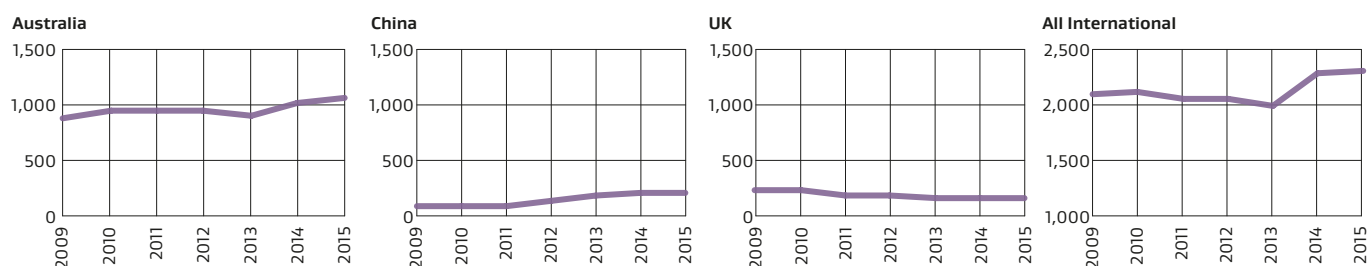
Source: MBIE – Regional Tourism Estimates, March years

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



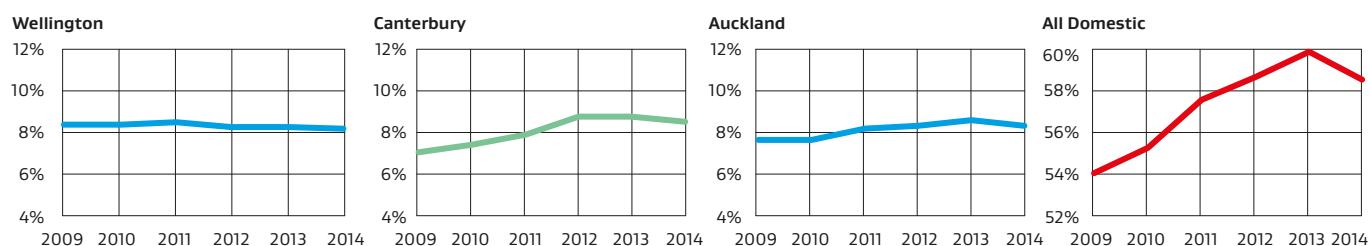
Source: MBIE – Regional Tourism Estimates, March years

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.

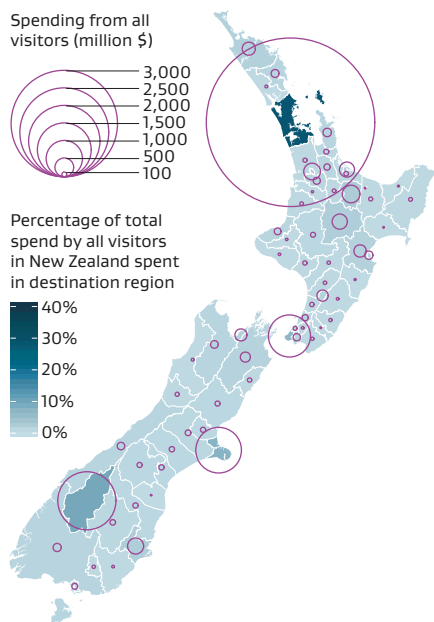
# Tourism by Region – Where They Go

## Regional Shares of Tourism Spend

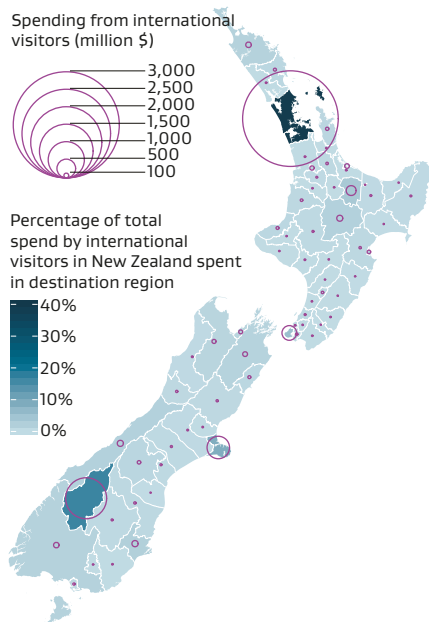
Both international and domestic tourism play important, varied roles in the different regions of New Zealand. The maps

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

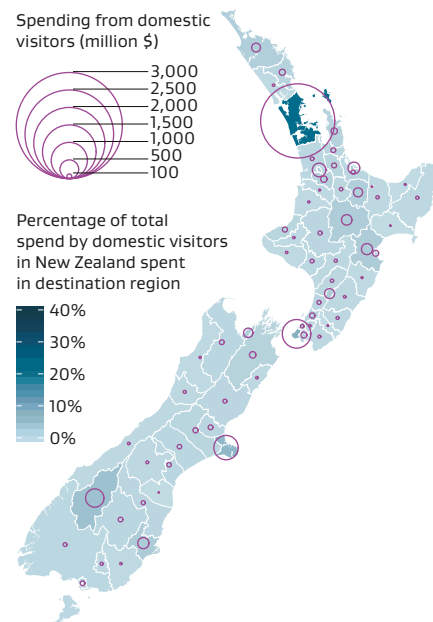
**FIGURE 21 – REGIONAL SHARE OF TOTAL VISITOR SPEND 2014**



**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.

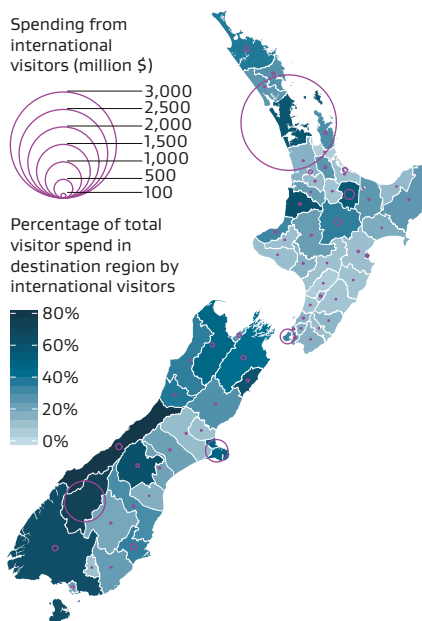
## International Tourism Spend

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).

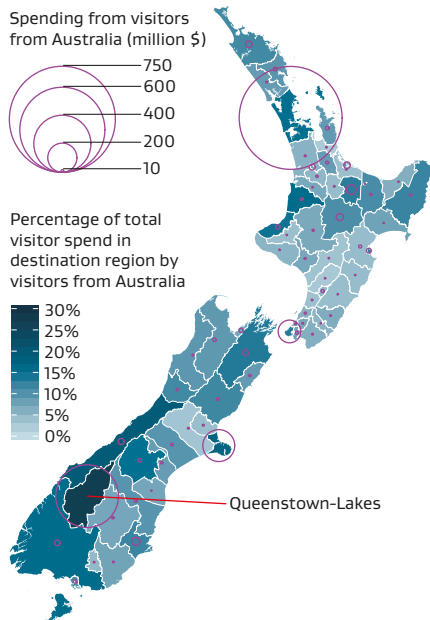
**FIGURE 24 – INTERNATIONAL VISITOR SPEND AS PROPORTION OF TOTAL VISITOR SPEND IN EACH REGION 2014**



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

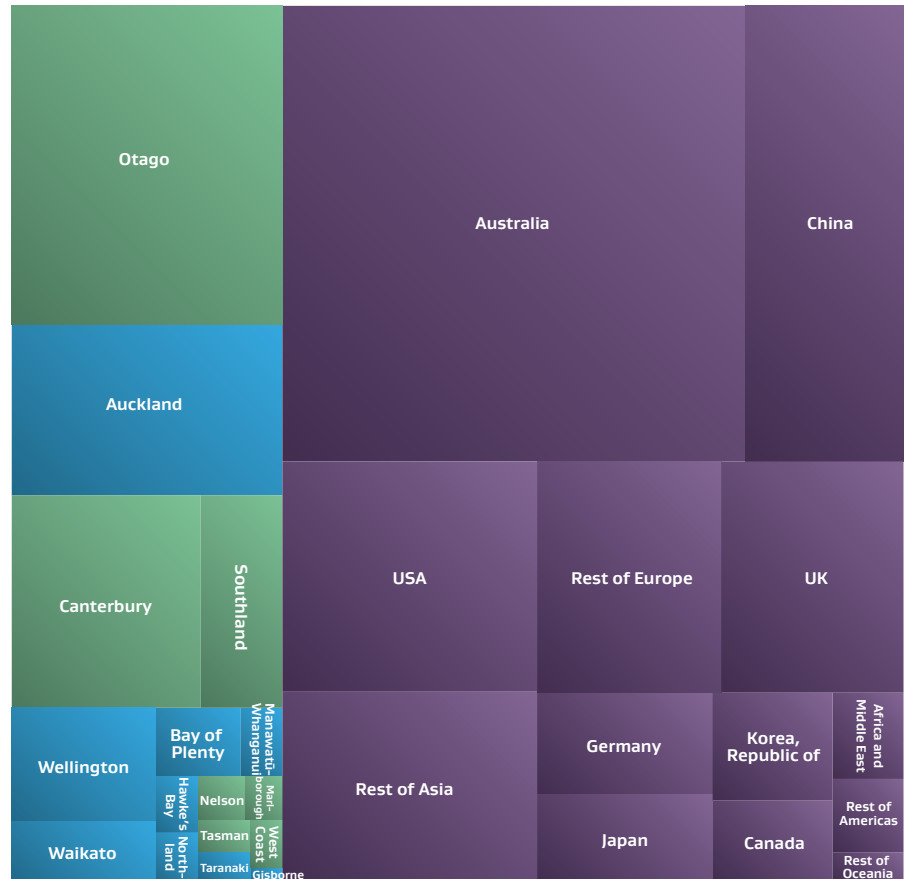
## Highlight 1: Australia and Queenstown

**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.

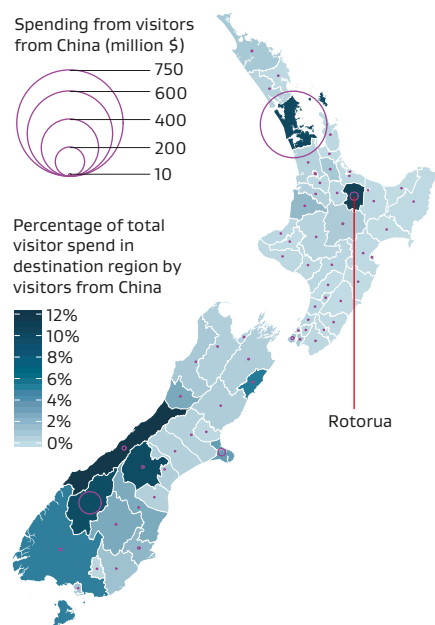
For Queenstown, Australia is the only direct connection for international flights, reflecting and reinforcing the particular importance of Australian visitors to this region. Australian visitors spent \$438.6 million in Queenstown in the year ending March 2014, making up 27 per cent of total tourism 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).

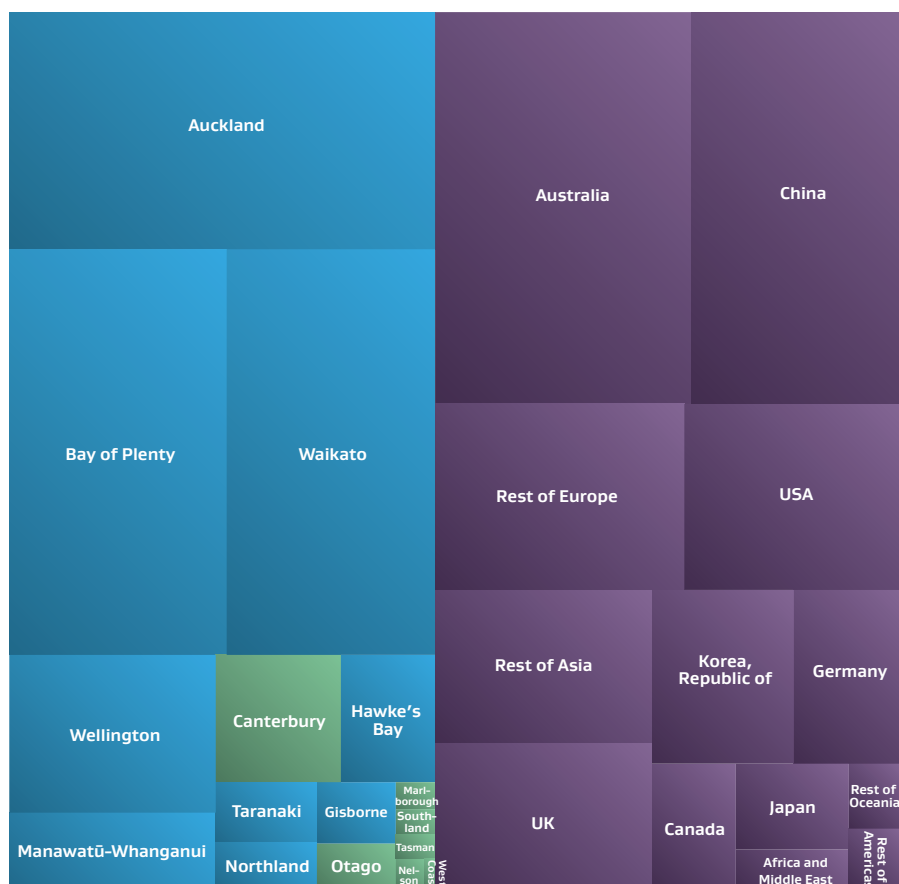
## Highlight 2: China and Rotorua

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

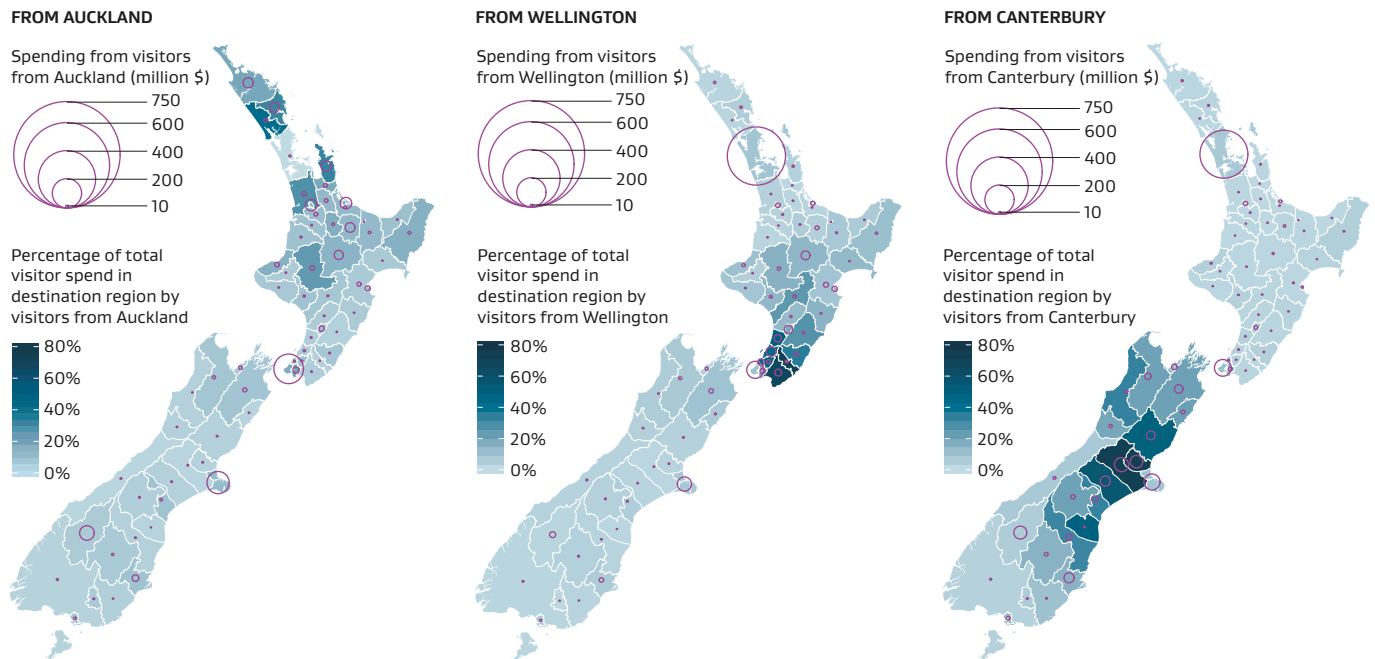
Chinese visitor spending is less dispersed regionally than spending by visitors from the UK, US, Europe and Australia. The Chinese tourism dollar is particularly important in Rotorua, where it made up 10.5 per cent of the \$468.3 million spent by visitors to Rotorua in 2014 (though still behind Australia's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

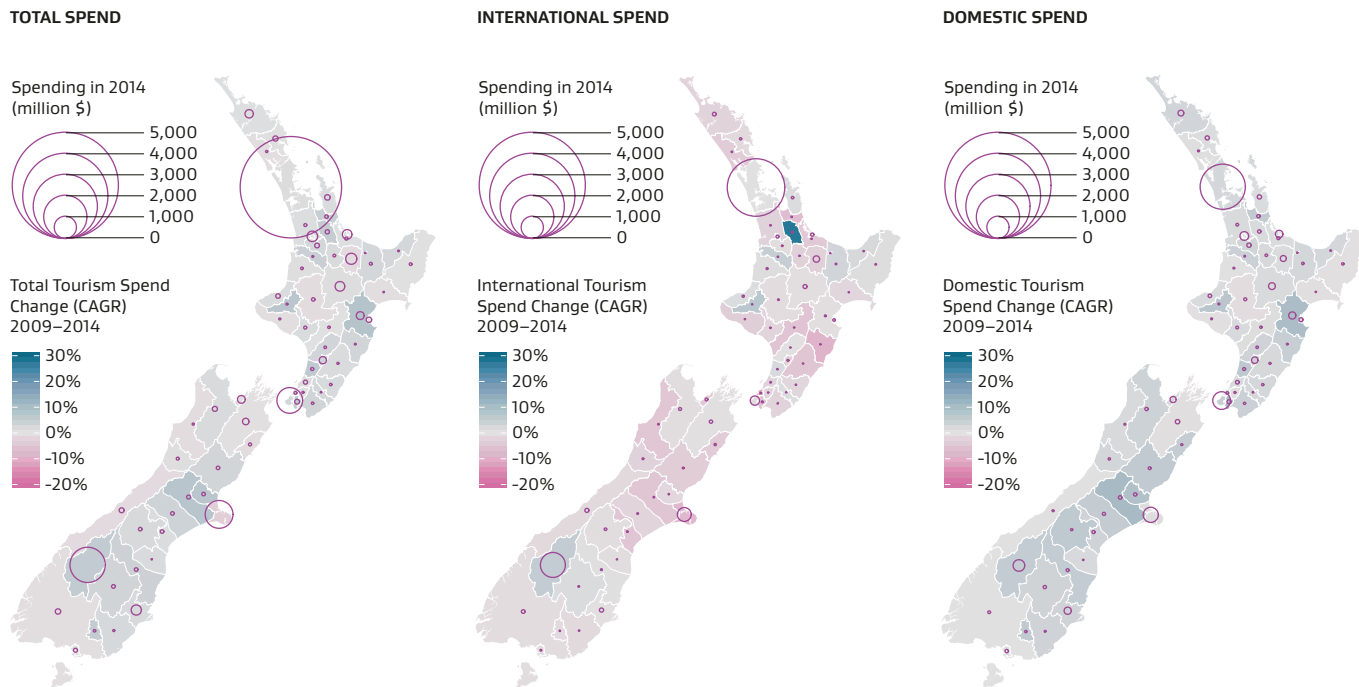
Wellington City, Christchurch, and Queenstown. As noted earlier, the total domestic tourism spend of Aucklanders is lower per capita than Wellington's and Canterbury's.

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).

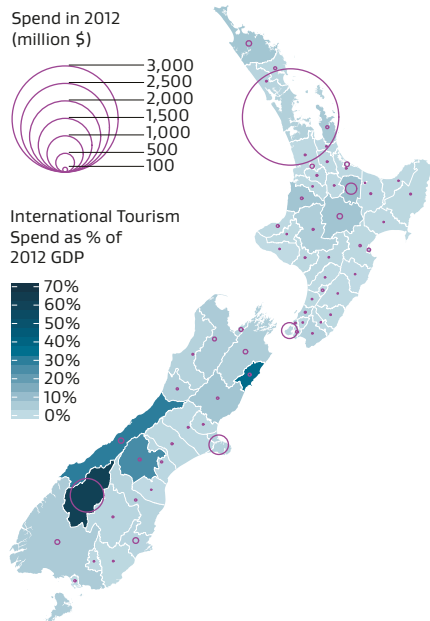
Growth in the domestic tourism spend can be a little more difficult to discern due to data collection issues currently under review<sup>1</sup>. An obvious trend is growth in domestic spend for the neighbouring districts of Christchurch City (eg Selwyn and Waimakariri), reflecting the shifting dynamics of the Canterbury region post the earthquakes, which moved some of the retail and accommodation sector out of Christchurch City into the neighbouring districts.

<sup>1</sup> 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.

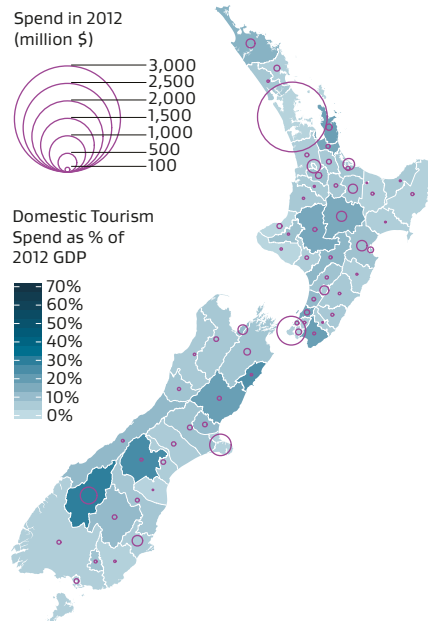
# Importance of Tourism to Regional Economies

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**



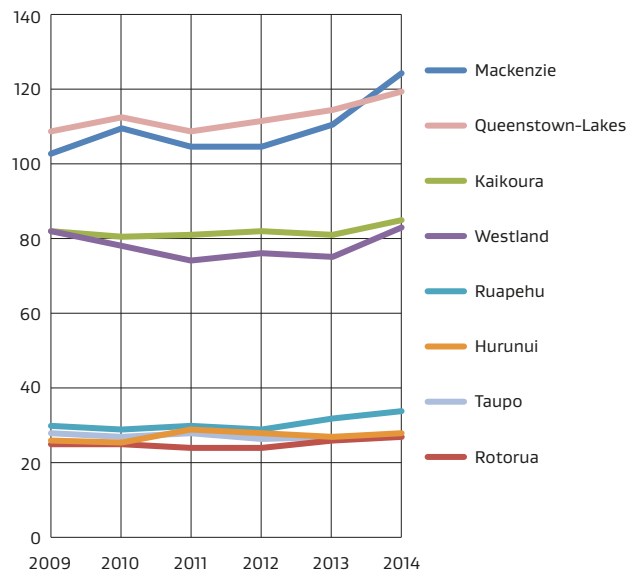
**FIGURE 32 – DOMESTIC TOURISM SPEND AS A PERCENTAGE OF TA GDP 2012**



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**



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

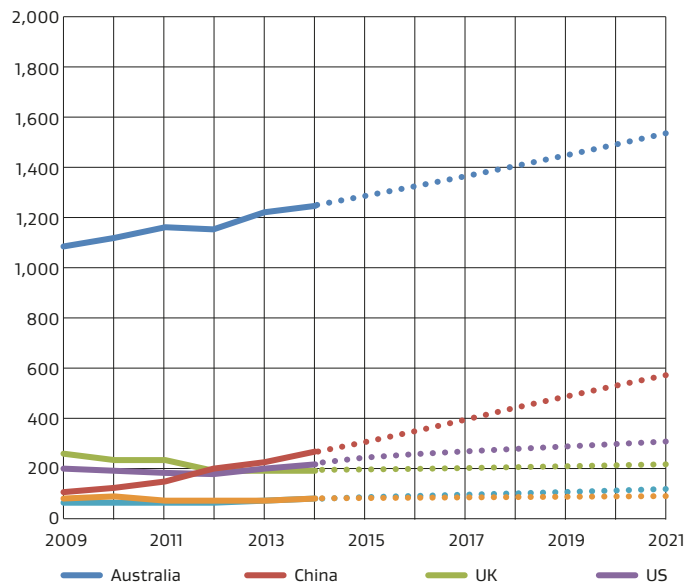
Queenstown is widely recognised as a key international tourist destination in New Zealand for its skiing and remarkable natural beauty. Mt Cook, in the Mackenzie region, is a strong drawcard for that region, but the high importance of international tourism also reflects the small population and the small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

# 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.

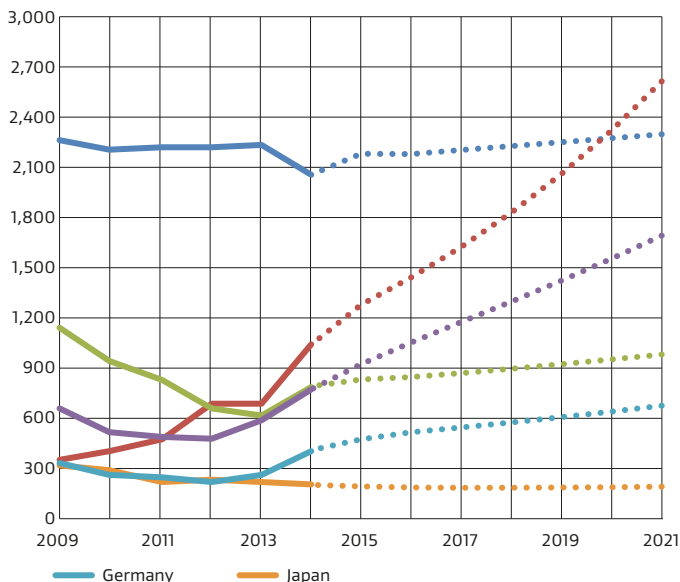
FIGURE 34 – NEW ZEALAND TOURISM FORECASTS – VISITOR ARRIVALS (000s)



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.

# 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
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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
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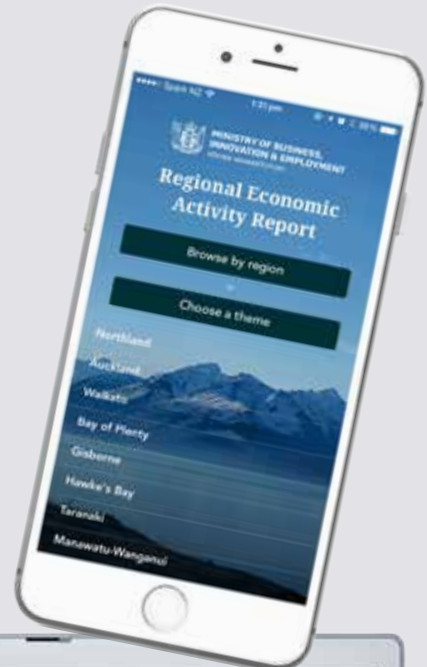
# Regional information at your fingertips

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>



Google Play



iTunes App Store