

**TEAM**

Economic Action  
Marlborough  
Mahi Tahī

# Marlborough's Economic Response to COVID-19

FINAL REPORT  
AUGUST 2020 TO JUNE 2021







Discover  
Pelorus

Havelock  
Kenepuru  
D'Urville  
French Bay

FLOWERS  
ORANGE  
TARTS  
BUTTER  
MILK  
SWEET  
PEANUTS  
CHOCOLATE  
FREE

MINI QUICHE  
SPINACH  
MUSHROOM  
SWEET CORN  
+ LEEK  
6 per  
\$4

CHOCOLATE  
BREAD  
\$3.50



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***“ We are so appreciative of the support from Council – both in terms financially of course but also the help from the Regional Events Advisor and various other MDC departments ”***

Savour in Marlborough – Evening Market



## Foreword

Marlborough was one of the first regions to set up a group to address the impacts of COVID-19. TEAM was set up following the announcement of the level 4 lockdown, however, the discussion around a collaborative, Marlborough-wide approach had started some weeks prior.

TEAM brought together central and local government with iwi, key industries and professional services focusing on supporting those hit hardest, retaining or creating jobs here in Marlborough and getting infrastructure investment and new opportunities for economic activity happening.

After securing funding from the Council's Emergency Events Reserve, TEAM set about implementing projects to help local businesses and leverage central government resources and funding.

This is the third report we have produced. Having reviewed the information from the Phase Two interim report in December 2020, it is gratifying to see the additional benefit TEAM has brought to the Marlborough community, including:

- A total of \$915,664 of funding committed to supporting Marlborough's economic recovery;
- 63 events supported, with over 44,000 attendees and an estimated \$6.2M of economic benefit to Marlborough;
- 34 additional businesses assisted – taking the total to 107;
- A further 31 young people supported into work readiness training (taking the total to 40); and
- Social Media campaign engagement of over 485,000.



TEAM's role has been to fill the gap in the economic recovery efforts should one exist. As a result, I am pleased to advise that Marlborough has, in general, recovered much faster and to a greater extent than had been forecast.

For example:

- The overall spend in Marlborough is similar to the previous year, as the loss in international spend was largely offset by increased domestic spend;
- In the year from July 2020 to May 2021, Marlborough had a record 957 job seekers exit off Job Seeker Support (moving onto employment). This is up approximately 40% on the 664 exits off Job Seeker Support for the same period last year; and
- When surveyed in February and March, businesses were generally optimistic about their future outlook for the next six months - 42% of businesses stated their level of performance would be about the same, and around one-third (30%) believed they would perform stronger. Conversely, just around one-quarter of surveyed businesses thought they would perform weaker in the next six months.







Dorien Vermaas, Economic Development Programmes Manager (centre) and Alan Simpson, Economic Portfolio Manager (right), accepted the award from EDNZ board member Patrick McVeigh (left).

While the indicators above are very positive, there are continuing impacts to:

- Specific industries (tourism is highly impacted);
- Specific geographies (Picton, the Sounds and South Marlborough); and
- Labour.

Due to the information received and the work currently underway through agencies such as MBIE, MSD, and iRSLG (to name a few), the decision has been made to wrap up the TEAM programme.

We are keenly aware that internationally COVID-19 is not under control. The impact on New Zealand will depend heavily on whether the border remains closed and if the virus enters the New Zealand community again. The Marlborough District Council will keep a close watching brief on the situation and reconvene TEAM if required.

I am very proud of what TEAM Group had achieved in helping Marlborough's COVID-19 recovery.

The hard work of all those involved in TEAM received recognition with a commendation at the 2021 Economic Development New Zealand (EDNZ) awards. The award recognises TEAM under the 'integrated planning' category of EDNZ's annual best practice awards.

I want to thank all the people who worked together with TEAM Group to support the Marlborough community and especially the individual members of TEAM Governance and our Programme Office Management team.

Ngā mihi

A handwritten signature in black ink, appearing to read 'Mark Peters'.

Councillor Mark Peters  
TEAM Chair



*“Better than expected  
impacts from COVID-19”*

TEAM Survey response



## Executive Summary

TEAM (The Economic Action Marlborough Group) was one of the first groups convened around New Zealand to address the economic impacts of COVID-19 on the regions.

A significant amount of work has been undertaken to ensure that all that can be done has been done to mitigate the pandemic's economic impacts on our community.

The economic well-being of the people of Marlborough has been the main priority for the TEAM group.

### The Purpose of TEAM

Council has the designated lead role at times of crisis and from the beginning of Level 4 lockdown brought together The Economic Action Marlborough (TEAM) group. While the National State of Emergency officially ended on the 12<sup>th</sup> of May 2020, the Marlborough District Council saw an ongoing need to focus on Marlborough's economic recovery and funded TEAM's Phase Two.

The scope of TEAM was to address the economic impacts of COVID-19 in the Marlborough region. This informs but does not replace existing economic development programmes at a regional or national level.

### Membership of TEAM

As TEAM moved out of the urgency of the Phase One initial recovery response, the structure was reviewed and moved to a programme of work led by a Governance group and supported by working groups and an expert panel which provided insight into specific areas of concern.

Membership of the Governance group included Council and central government representation and representation from iwi and the most impacted industries – namely tourism and hospitality.

### Phase One

TEAM was first convened in March 2020, as New Zealand moved into Level 4 lockdown. The first phase of the Programme (Response), conducted entirely on Zoom, addressed the initial impacts on the Marlborough region and ensured that Marlborough was included in national programmes of work such as the shovel-ready projects.

### Phase Two

The second phase of TEAM's Programme (Resilience) got underway in early July 2020, with a refreshed Governance group and structure focused on the most affected sectors.

A key focus of the Phase Two work has been an in-depth study of the impact of COVID-19 on Marlborough's economy and the identification of critical resilience and return projects that can mitigate its effects and assist in the recovery efforts.

Actions in the Phase Two Programme of work centred around:

- Ensuring actions identified in Phase One were resourced and followed through;
- Reporting back to the Council and community on Phase One;
- Understanding the ongoing impacts of COVID-19 on the Marlborough community;
- Reporting on findings;
- Facilitating necessary and appropriate actions as part of ongoing recovery and re-imagination from COVID-19; and
- Advocating for sufficient resources to complete appropriate actions for recovery and re-imagination.



## The Impact of COVID-19

The outlook for New Zealand and Marlborough due to the impacts of COVID-19 is much better than was feared at the time of the first TEAM report.

When TEAM went into Phase Two, there was reasonable confidence that the virus was under control in New Zealand. TEAM recognised that tourism was our most affected sector, along with geographically, Picton, Sounds and South Marlborough. There was also a concern around jobs/labour, especially for young people, being a key area of concern.

TEAM group and the Council has worked alongside Business Trust Marlborough, Marlborough Chamber of Commerce, Nelson Regional Development Agency, local businesses, and central government agencies to ensure actions taken are connected to both business and Marlborough worker needs, activating resources that have a multiplier effect, and providing maximum efficiency across as much of the district as possible.

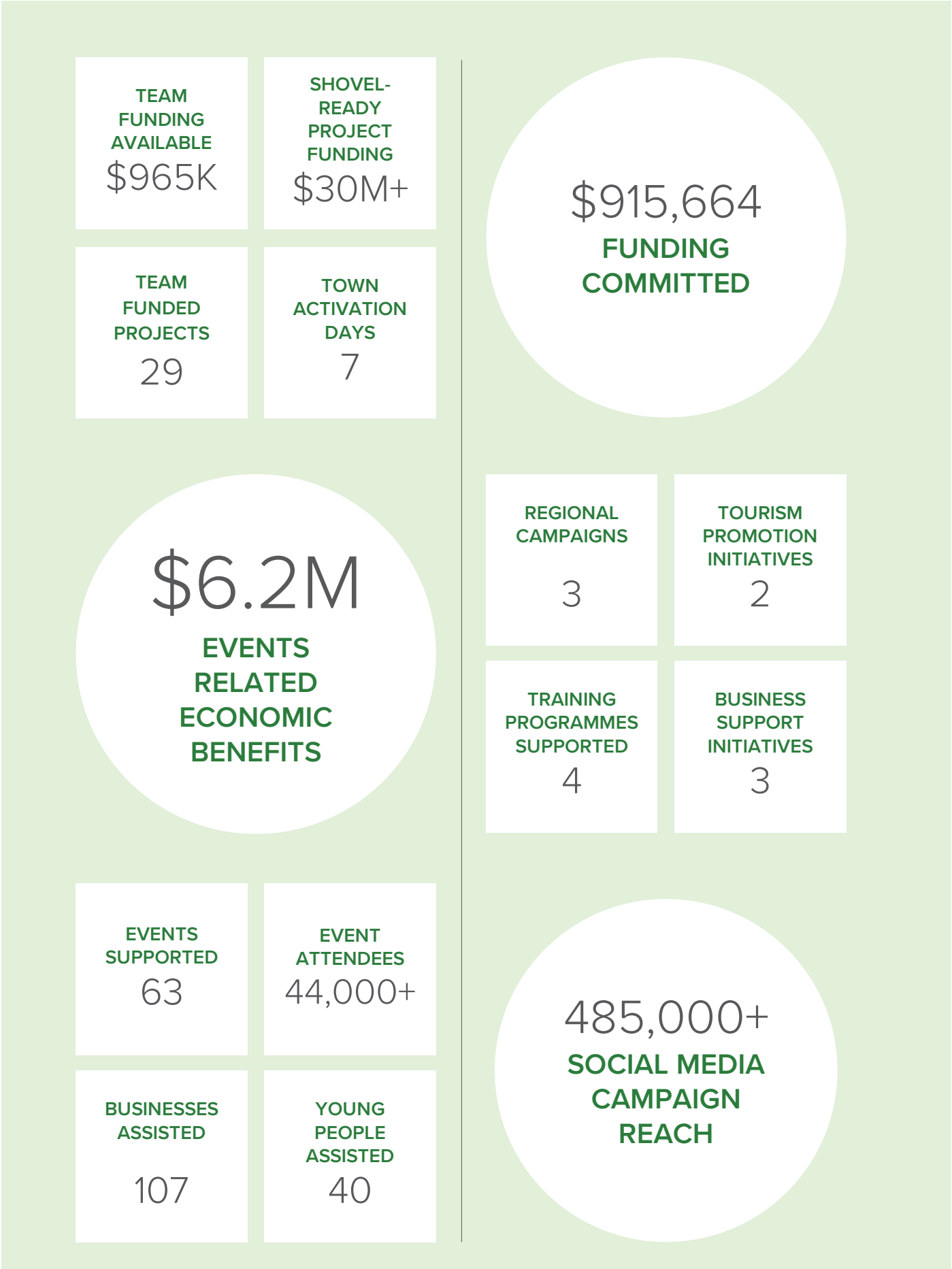
As part of the data gathering and surveying, TEAM asked industry and businesses what they saw as the need going forward, including re-imagination opportunities. They told us that for many of our businesses, they have returned to a form of business as usual. However, should there be re-imagination required, this is something that they have undertaken within their business or industry.

*“ NZ people are amazing at travelling but  
are not spending as much as internationals ”*

TEAM Survey response



TEAM's Actions and Initiatives





## Current economy



## The Future

This report was initially intended to set out the second phase of the Marlborough economic recovery plan to the COVID-19 pandemic. However, the data and feedback received have shown a return to normal for many of Marlborough's businesses. Therefore, barring any change to the current situation, the value of the TEAM programme has been achieved.

This report wraps up the TEAM project and moves the responsibility for actions to address the economic impacts of COVID-19 on the Marlborough region into the remit of BAU.

Industry and individual businesses have owned the re-imagination and transformation required. We have already seen rapid progress through necessity, and this is likely to continue. Some examples provided to TEAM by Marlborough businesses include remote working, contactless payment methods, market diversification and automation.

TEAM will hand over key actions to Destination Marlborough and the Economic Development team at MDC.

The Mayor and Cllr Mark Peters will also continue to review any applications received for funding, focusing on those areas (Picton and the Sounds) and industries (tourism and hospitality) still suffering the most and labour support.

## Purpose of TEAM

Council has the designated lead role at times of crisis and from the beginning of level four lockdown brought together The Economic Action Marlborough (TEAM) group. While the national state of emergency officially ended on the 12th of May 2020, the Marlborough District Council saw an ongoing need to focus on Marlborough's economic recovery and funded TEAM's Phase Two.

The main objectives of TEAM have been to understand the impacts on Marlborough's economy and to find the best projects and solutions to:

- help local businesses;
- keep people employed;
- contribute to generating cash flow and local economic activity;
- bring export-related revenue into the region;
- leverage the regional comparative and competitive advantage; and
- leverage central and local government input.

The scope of TEAM has been to address the economic impacts of COVID-19 in the Marlborough region. This informs but does not replace existing economic development programmes at a regional or national level.

### Governance Group

#### Council Representatives

Clr Mark Peters (Group Chair),  
Clr Gerald Hope, Clr David Croad,

#### Iwi Representatives

Venessa Ede (Te Ātiawa),

#### Industry Representatives

Tony de Reeper, Lynette Rayner,  
Maria Baxter

#### Central Government Representative

Craig Churchill

#### Programme Office

Neil Henry, Alan Simpson, Liz Webb

#### TEAM Groups

Labour and Business Support

Tourism, Retail and Hospitality

Data

#### Expert Panel

Iwi, industry experts,  
central government including  
MSD, MDC Councillors

#### Supporting

Infometrics, Marketview  
Business community (through  
surveys and facilitated discussion)



## Membership of TEAM

As TEAM moved out of the urgency of the Phase One initial recovery response, the structure was reviewed and moved to a programme of work led by a Governance Group and supported by working groups and an expert panel who provided insight into specific areas of concern.

Membership of the Governance group included Council and central government representation and representation from iwi and the most impacted industries – namely tourism and hospitality.

Full details of the mandate and membership of each group can be found in Appendix A.



Pictured (from front left to right): Liz Webb, Cllr David Croad, Lynette Rayner, Neil Henry, Cllr Mark Peters, Cllr Gerald Hope, Maria Baxter, Craig Churchill, Alan Simpson and Tony de Reeper. Not pictured Vennessa Ede.

## Phase One

Phase One of TEAM ran from May to July 2020 and focused on the initial response to the COVID-19 pandemic. The group was formed from our key business sectors – farming, aquaculture, forestry, wine, tourism, iwi, small to medium enterprises and transport.

TEAM commissioned an Infometrics study to provide insights into how the pandemic was impacting Marlborough's economy. The report told us that our tourism, accommodation and hospitality sectors, construction, and CBDs in Picton and Blenheim were our most significant challenges.

The study also predicted Marlborough would see unemployment double here in the year to March 2021, and TEAM worked hard to mitigate that impact so that Marlborough could do better than was predicted.

The economic recovery response plan provided a detailed outline of 60 projects and initiatives that could get underway rapidly to help our region emerge through the first phase of COVID-19 impacts.

Phase One was not a stand-alone document. Instead, it linked to the enormous effort from central government via wage support, shovel-ready infrastructure projects and other spending mechanisms to keep the cash flow going and people in jobs.

Council has also responded quickly with its infrastructure spending package, which saw around \$100M spent in Marlborough in the financial year – with \$60M in capital works programmed for each of the next three years.

Council also invested in elements of the TEAM first phase plan, including the six-month 'Make it Marlborough' support local campaign and a domestic visitor campaign.

Phase One, as could be expected in an initial emergency response, was brought together rapidly. Unfortunately, TEAM could not engage in the usual more comprehensive consultative processes because of the urgency applied to get early responses ready for delivery.

An update on the Phase One projects was provided in the TEAM Phase Two interim report in December 2020 (a link to this report can be found in Appendix F). All 60 projects from the Phase One report have the (TEAM involvement) completed, including:

- Direct central government funding >\$30M;
- Additional MDC funded projects and capital works - \$61.5M. Projects include:
  - Blenheim library/art gallery;
  - Blenheim northwest sewer;
  - Renwick and Havelock reservoirs;
  - Wairau River flood protection works;
  - Blenheim storm waterworks; and
  - A wide range of sporting and community facilities, including Lansdowne Park sports hub, and playgrounds, toilets and walking/cycling tracks throughout Marlborough;
- Free CBD (Central Business District) parking;
- Workforce training;
- Funding for key community venues; and
- Infrastructure investment.

Since the Interim report in December 2020, there has been further action on the projects, including:

- Library foundation finished and framing starting to go up;
- Wine Research Centre build project underway;
- A proposal in the MDC Long Term plan to make the one hour CBD parking permanent; and
- Significant investment from central government and TEAM in workforce training.

As expected, TEAM's work within Phase One helped to create activity in the region and helped keep people employed. Further updates on projects that rolled into Phase Two can be found in the TEAM interventions section.



## Phase Two

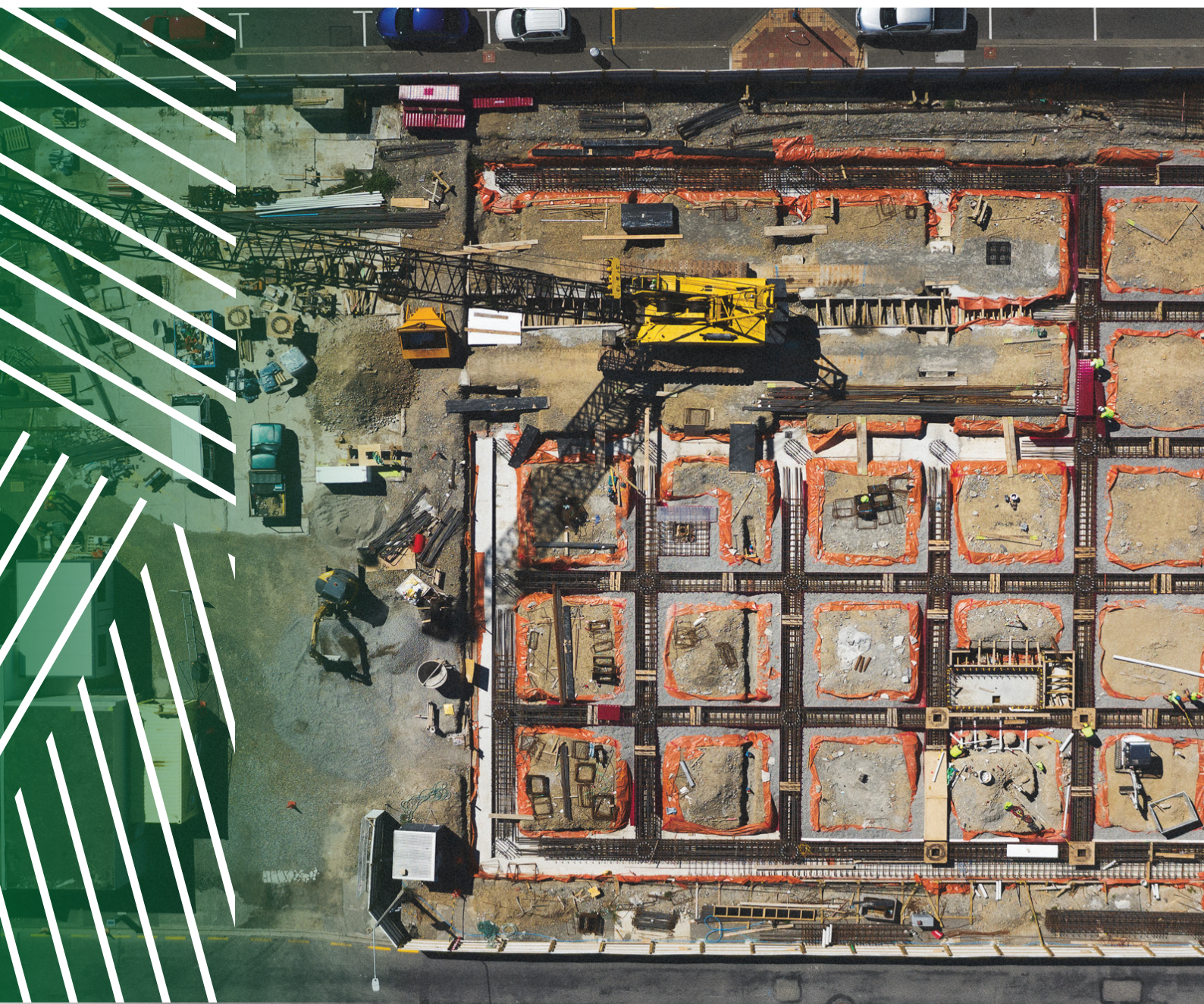
The second phase of TEAM's Programme (Resilience) got underway in early July 2020 with a refreshed Governance group focused on the affected sectors. A key focus of the Phase Two work was to:

- Investigate and monitor the economic impact of COVID-19 on Marlborough;
- Stay connected to local businesses; and
- Invest in projects to mitigate problems identified, alongside bigger government programmes.

This report was intended to be the Phase Two resilience report. Disaster recovery has four stages – the immediate response (as covered in the Phase One report in June 2020), resilience – where maintaining cashflow and jobs are the focus, followed by the return phase (where capacity and scale are rebuilt), and a re-imagination phase (where lessons from the recovery can be integrated into a 'new normal' including environmental benefits).

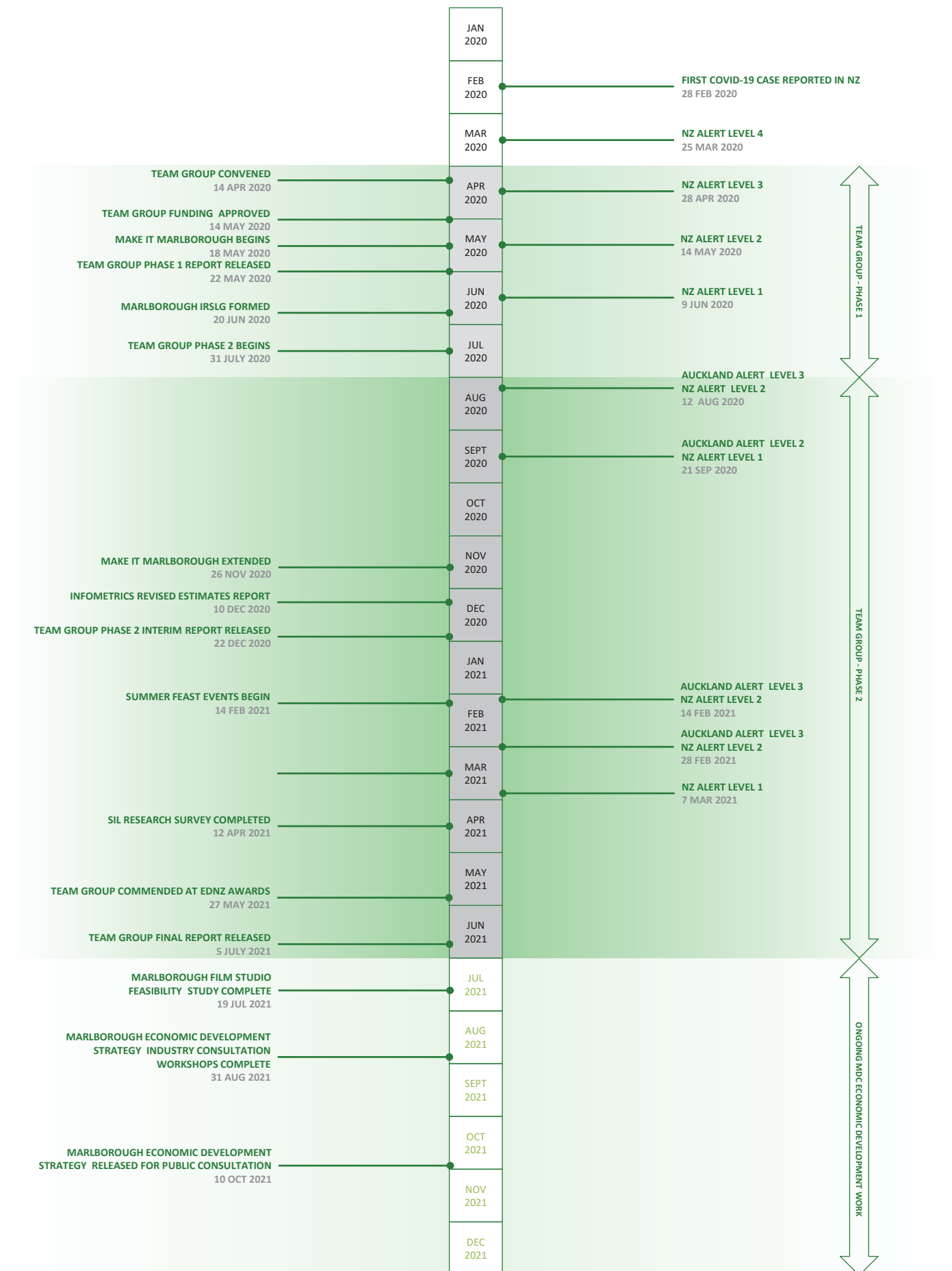
The original plan had been to release a Phase Two resilience report in December 2020. However, it quickly became apparent that the country was still in a period of significant change. The wage subsidy had finished, the election was held in October, and our hardest-hit industries (hospitality, retail and tourism) traditionally rely on a solid summer season to support their businesses through winter.

An interim report providing an update on progress and information was therefore produced in December, with the Phase Two report delayed until July 2021.





# Timeline





## Impact of COVID-19

As previously mentioned, a large part of the focus of Phase Two of TEAM has been on the collation of data to inform interventions.

There are four core sources of information that the TEAM Governance group have funded in Phase Two:

- **SIL Business Survey**

The goal of this survey was to better understand the ongoing impacts of COVID-19 on the Marlborough business community, to carry out necessary and appropriate actions as part of ongoing economic recovery. TEAM sought the input of 400 businesses, large and small, within all business sectors from across the Marlborough region. The survey asked about the impact of COVID-19 on people's business, business confidence and future expectations and helped identify funding opportunities.

The survey was done in February – March of 2021 to gain a picture of business confidence and experience after the summer season, where so many of our tourism businesses rely on a strong season to fund the slower winter period.

- **Infometrics**

TEAM commissioned reports from Infometrics in May and November 2020.

The two Infometrics reports provide a point in time overview of the expected economic effects of the COVID-19 recession on the Marlborough District. They included an assessment of the headline impacts of the recession and an overview forecast

The reports tracked an increasingly positive outlook, reflected in Marlborough's performance to date.

- **Marketview**

The TEAM Governance group funded access to Marketview consumer spend data – that is, card spending to provide TEAM with access to sub-regional data to inform decisions around interventions and track the success of interventions. This information is particularly relevant to visitor spend, which was identified as a priority.

TEAM gained access to Marketview data from February 2021 and have recommended access to the data for two more years to allow TEAM, MDC Economic Development and Destination Marlborough to inform decisions and track interventions during the ongoing uncertainty period for the visitor sector.

As part of Marketview, we have access to five years of historical data, which provides a pre-COVID baseline to track against.

- **Job Seeker Numbers**

As part of the Ministry of Social Developments ongoing response to COVID-19, weekly, monthly, and other ad hoc reports are released to provide additional information on the income support system. TEAM have used this data to track the impact of COVID-19 on employment in the region.

- **Other**

Alongside these key data sources, the following information has been collated;

- Monthly newsletters to the Expert Panel group inviting their feedback, including through surveys;
- Industry focus groups, sharing the insights from SIL research's and seeking further feedback;
- Monthly Retail, Tourism and Hospitality working group discussions to hear from experts from the industry;
- TEAM Governance Group standing agenda item; and
- Monthly Labour and Business Support working group meetings of agencies working on COVID recovery in the region.

In general, the impact of COVID-19 has been less severe than initially anticipated. However, the principal effects have been on the tourism, retail and hospitality industries (despite higher-than-expected consumer spend over winter) and job losses (particularly for young people).

The actions of the New Zealand Government to pursue an elimination strategy has allowed life within New Zealand to remain close to normal. However, this does not negate the closed borders' impact or changes to international trade on New Zealand's economy. A couple of examples of this has been the ongoing, rolling lockdowns in America closing restaurants and reducing salmon and wine sales, and the lack of cruise ship visitors into Picton.

Phase One indicated key sectors would be significantly impacted. The next section delves into the insights from the individual data sources before looking at each sector, what actions were taken and the subsequent impact.

## Infometrics

Infometrics is an economics consultancy that specialises in analysis and forecasting of economic data, including regional data.

Infometrics developed a regional 'early estimates' report in May 2020 that TEAM took up that showed the data available to date on the impact, and a forecast on the expected impact by March 2021. The first report indicated that there would be a number of significant blows to the Marlborough economy over the coming year.

It became evident as time progressed that the impact on the New Zealand economy was less severe as the country was internationally recognised for its response to COVID-19. A second Infometrics report was purchased in November 2020 that revised the forecasts. Whilst a less severe impact to the first report was predicted, a number of impacts were expected.

The predicted impacts, with outcomes by March 2021 are as follows:

Forecast	May 2020 report	November 2020 report	March 2021 actual	Difference to original estimate
GDP change, year to March 2021	-7.5%	-5.0%	-1.3%	6.2% better
Job losses, year to March 2021	2,646	-1,528 (April 2020 to March 2022)	-105 jobs	2,539 jobs better
Unemployment rate in March 2021	8.2%	4.9%	2.5%	5.7% better
Loss in total earnings from job losses	\$137M	\$72.8M	\$5.4M	\$131.6M better
Residential construction change	-34.5%	-40.6% (April 2020 to March 2022)	-9.4%	25.1% better
Non-residential construction consent	-5.5%	-7.2% (April 2020 to March 2022)	+1.5%	7% better

The results for Marlborough as at March 2021 are significantly better across the board compared to the early estimates in May and the revised estimates in November.



“Marlborough’s diverse economy provides a solid basis for further recovery”

Infometrics revised estimates November 2020

## TEAM survey of businesses

TEAM identified a need to undertake detailed research of a representative sample of local businesses so it could understand in depth how the pandemic affected them. The survey was timed in early 2021 to enable a longer look back over the post-COVID period, and also towards the end of the summer season to ascertain how this crucial trading period went for visitor economy businesses. A total of 400 Marlborough businesses participated in the survey in February and March 2021, with a geographically and industry mix similar the proportion of all businesses by those categories. The survey was undertaken by a professional market research company, mostly by telephone interview with principals of the businesses.

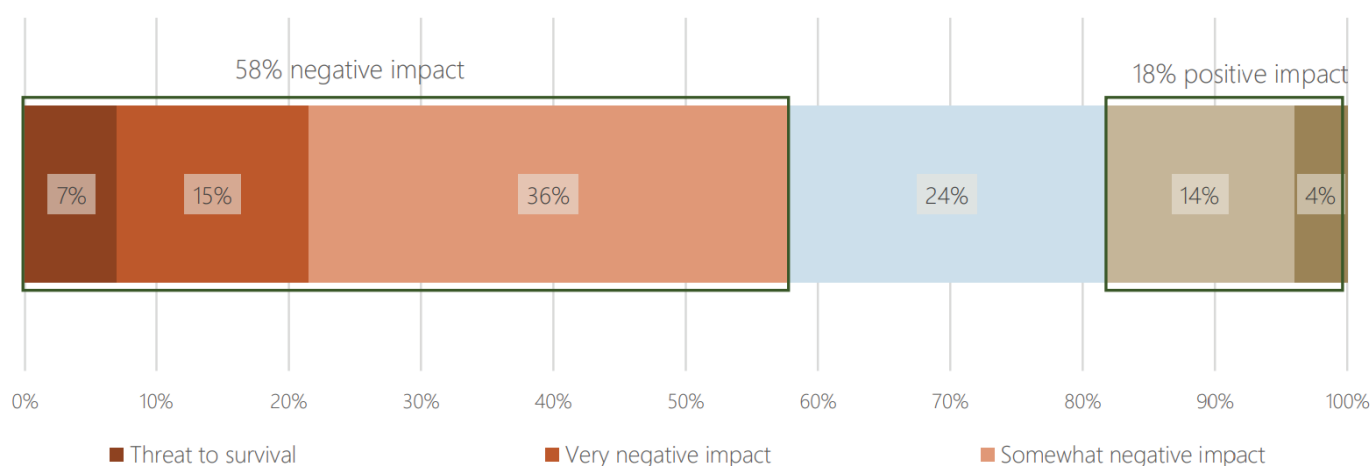
The main findings of the survey were as follows:

- 58% of Marlborough district businesses stated the COVID-19 situation has had an overall negative impact on them, including 7% that reported it was a threat to their survival. This was slightly better than the 62% benchmark impact from the North Island by the survey company.
- Less customers, sales and/or demand was the most cited negative impact at 73%.
- Hospitality, tourism and the recreation sector (71% overall impacted) were most affected across the survey, whilst professional, scientific and technical, and retail, businesses reported a positive impact.
- Picton and the Marlborough Sounds businesses were worst affected geographically (64% overall impacted) and Blenheim (53%) least affected.
- For businesses reporting a positive impact, 'increased demand/more customers' was the greatest benefit.
- Over half of all businesses reported that the turnover/revenue was most negatively affected.
- 15% of businesses surveyed reported employee redundancies, and 39% reported experiencing difficulty recruiting staff.
- Businesses were generally optimistic about their future outlook for the next six months. 42% stated their level of performance would be the same, and 30% believed it would be stronger.
- 81% of businesses felt that another lockdown would have a negative impact, a quarter of these reported 'very negative impact' and 13% 'threat to survival'.

More detailed results of the TEAM survey can be found in the industry sections.

## Overall Impact

Overall, what impact, if any, has the COVID-19 situation had on your business?



TEAM found this survey to be of high significance as it included a large number of local businesses and reviewed a period of almost a year. The results of the survey when associated with other data have provided a robust picture of what the impact was, who was affected and what the outlook is.



## Marketview

While Marketview data provides the subregional view that had previously been lacking, there are a couple of restrictions to the data which should be noted when viewing:

- The information includes card spend only – it does not capture invoiced, or cash spend. Anecdotally we know that there has been an increase in the sale of big ticket items such as cars and home renovations which will not be captured.
- The source of the customer is based on where the card was issued, not necessarily on the customer's current address.
- The use of cards as a contactless payment method has been promoted post-COVID to reduce the spread of disease, and there is no way to confirm the materiality of the change in behaviour on the numbers shown.

While the data shows that consumer spending has returned to pre-pandemic levels, the return has been uneven, with some industries and areas still significantly below pre-COVID values.

Some key outtakes include:

- The overall spend in Marlborough is similar to the previous year, as the loss in international spend was primarily offset by increased domestic spend.
- Marlborough residents have stepped up and “bought local” with increased spending from locals in the region.
- There has been an increase in the number of North Island residents travelling to Marlborough.
- Spend on some visitor-related activities is down, such as accommodation and other consumer spend – e.g. transport, mountain biking, kayaking etc.
- Spend in locations more reliant on international visitors – Picton and the Sounds – is down compared to the previous year.
- The lack of international travellers continues to impact those industries and areas which rely heavily on tourism.

Marlborough has sat consistently over the past five years at 1% of consumer spending in New Zealand.

This trend has continued post-COVID, with a 0.3% increase in Marlborough's share of national spend totals.

Unlike New Zealand as a whole, Marlborough did better in the April 2020 - March 2021 year than the same period two years previous – with a 1.7% increase in consumer spend against a 1.8% drop nationally

	All of New Zealand (% change from the previous year)	Marlborough (% change from the previous year)	Marlborough as a percentage of national spend
April 2016 - March 2017	\$ 58,378,276,088	\$ 605,812,432	1.04%
April 2017 - March 2018	\$ 61,215,873,056 (+5%)	\$ 650,868,553 (+7%)	1.06%
April 2018 - March 2019	\$ 63,503,421,738 (+4%)	\$ 675,795,596 (+4%)	1.06%
April 2019 - March 2020	\$ 64,898,369,560 (+2%)	\$ 693,622,683 (+3%)	1.07%
April 2020 - March 2021	\$ 62,373,725,359 (-4%)	\$ 687,690,900 (-1%)	1.10%

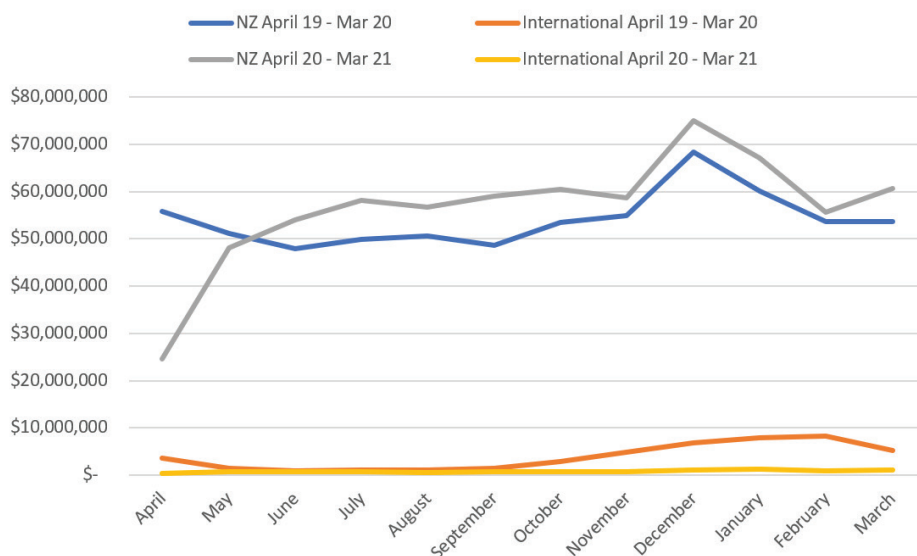
We see a similar spend flow across the last five years nationally and regionally, with significant upticks in the summer months and the same reduction in spending over the full Level 4 lockdown in April 2020.

Moving onto Marlborough specific data and focusing on the years immediately prior to, and post the April 2020 lockdown, from May 2020 (excluding February 2021), spend has been above that of the same month the previous year. However, this regional story has not been repeated in Picton or North Marlborough, where there is a higher reliance on international travellers.

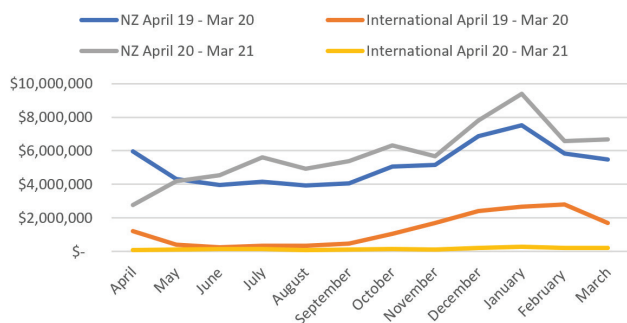
The charts on customer origin in the whole Marlborough region vs Picton show this difference clearly. For the region as a whole, the local and New Zealand sales have replaced the losses caused by the lack of international travellers. Local spend accounts for 70% of the total consumer spend across Marlborough – but 50% of Picton and 30% of North Marlborough spend. With this higher reliance on international travellers pre-COVID in Picton and North Marlborough, the increase in local and domestic traveller spend has not replaced this funding.

Details of how the regional spend areas are defined can be found in Appendix C.

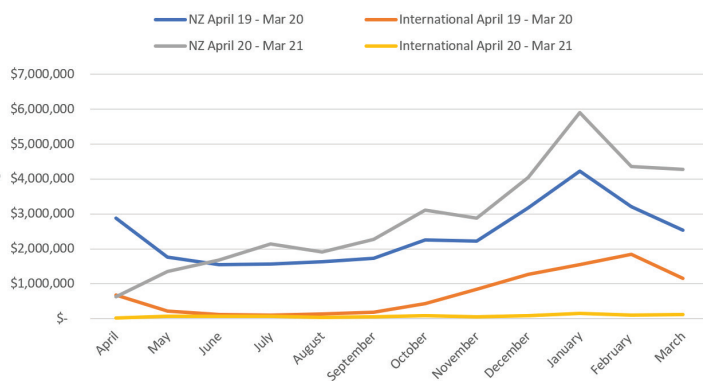
Customer Origin all of Marlborough



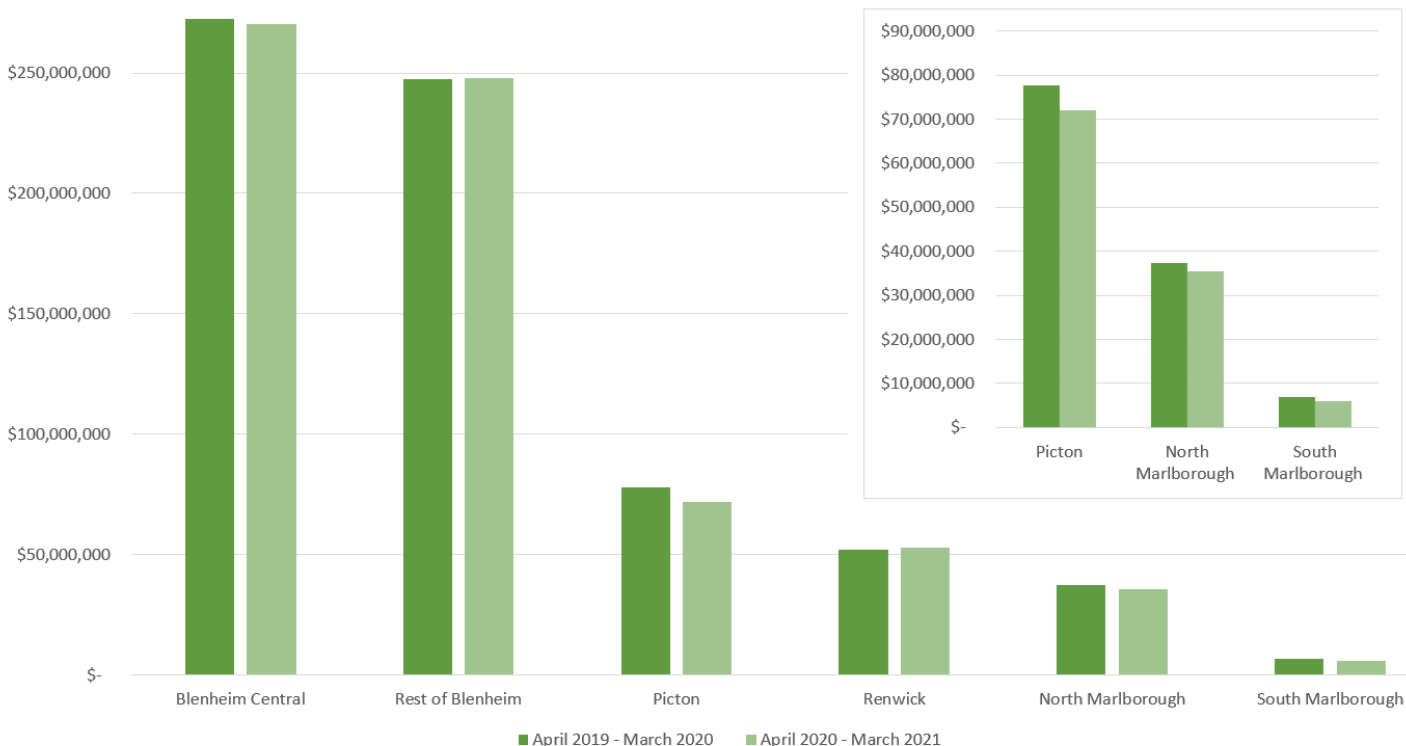
Picton Customer Origin



North Marlborough Customer Origin



Where is money being spent (sub-regions)

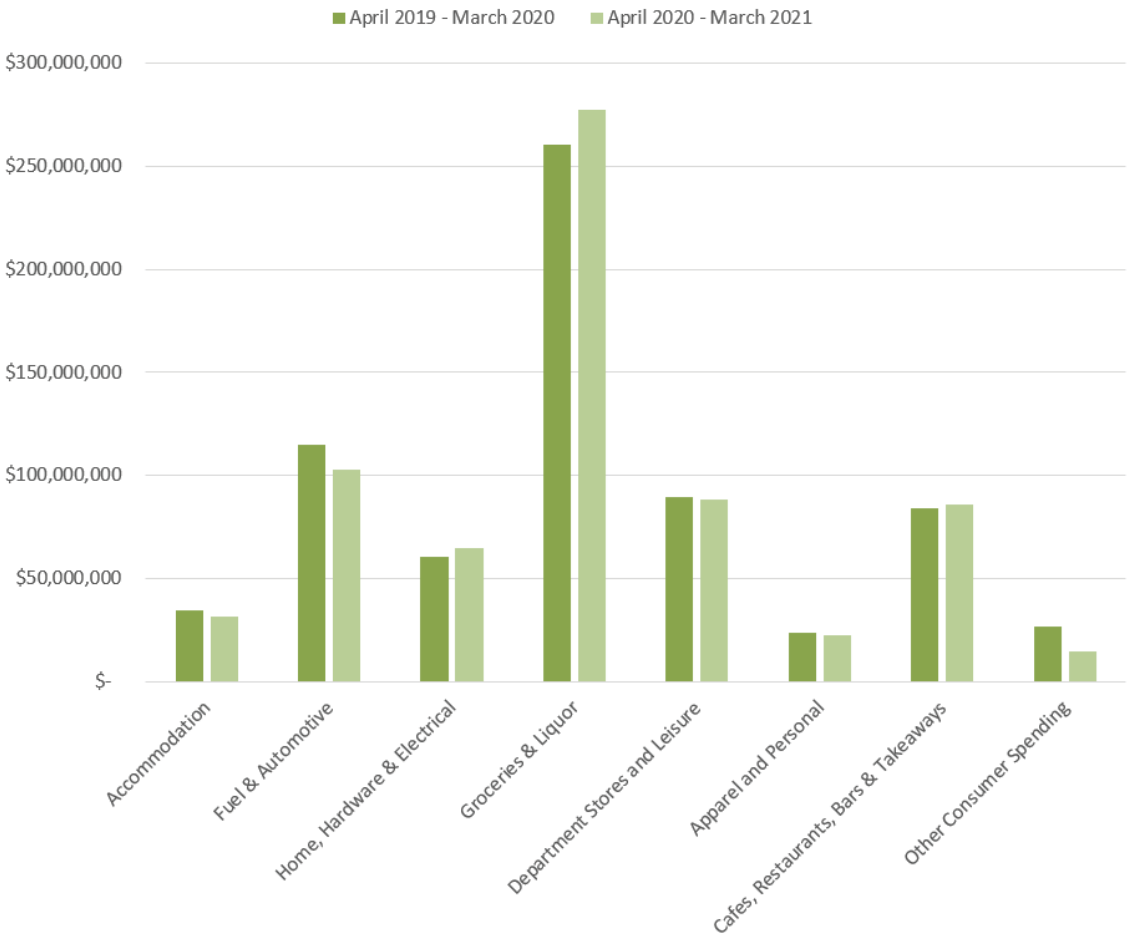


We have seen some significant shifts in what money is being spent on. For example, there has been increased consumer spend on 'Home, Hardware and Electrical' (+8%), along with 'Groceries and Liquor' (+6%), and 'Café, Restaurants, Bars and Takeaways' (+2%).

However, some of the lower spend categories are more important to our geographically more impacted areas, such as 'Accommodation' (-7%) and 'other consumer spend' (-46%) which includes tourism operators.

There was a significant drop in other consumer spend in Blenheim Central – which includes travel agents.

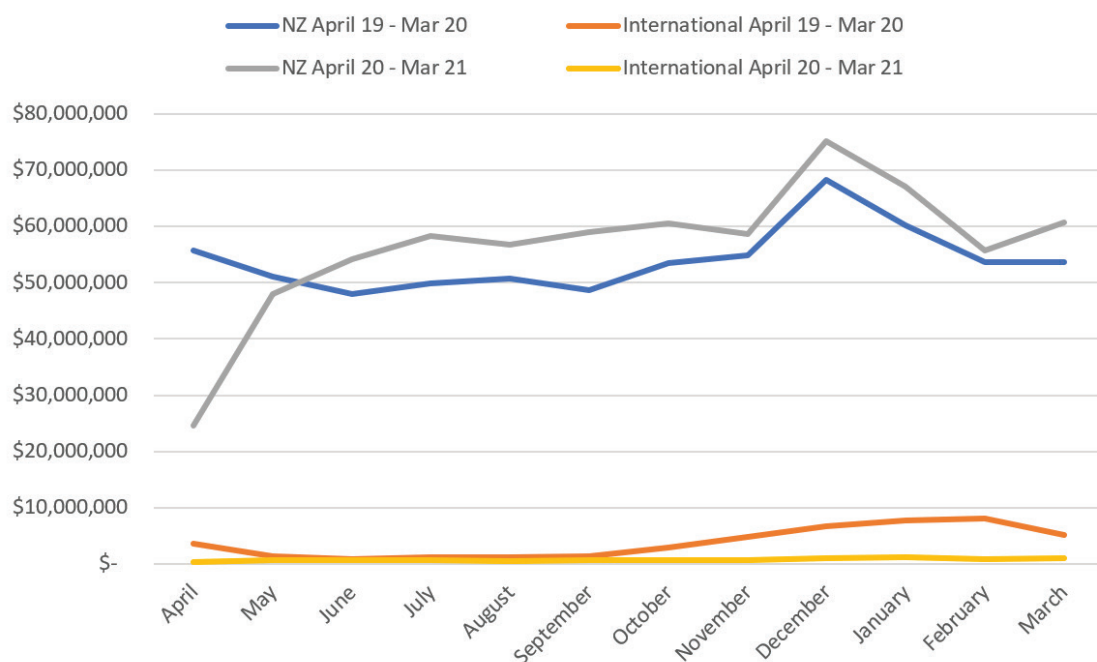
Year on Year Category Spend Comparison



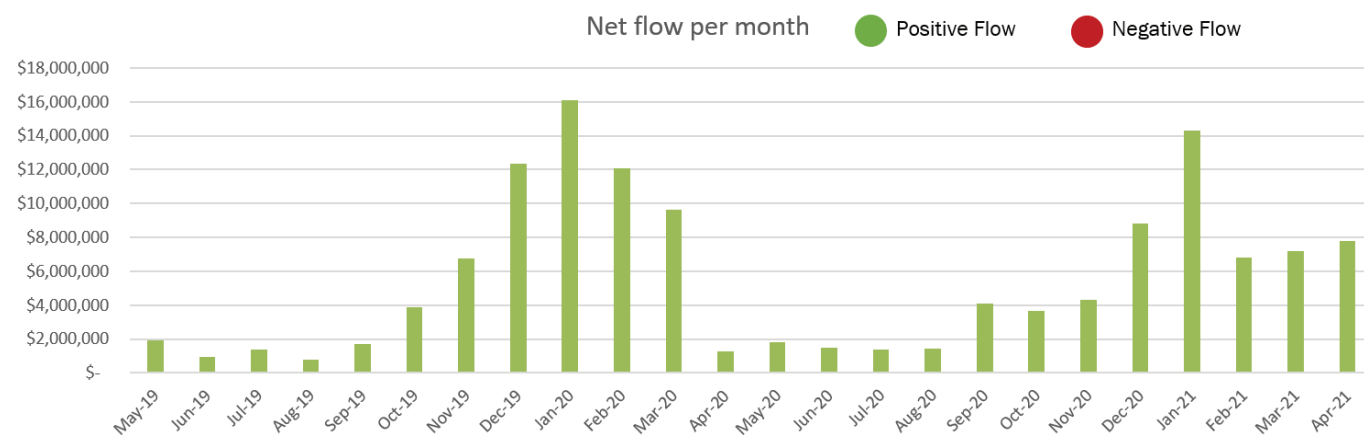


Additional domestic spending has largely replaced international spending across the region.

### Customer Origin



There continues to be positive net flows, with more consumer spend coming into the region than leaving it.



Job Seeker Data

This data provided by the Ministry of Social Development shows that year to date (July 2020 to May 2021), Marlborough had a record 957 job seekers exit off Job Seeker Support (moving onto employment). This is up about 40% on the 664 exits off Job Seeker Support for the same period last year.

Whilst, unfortunately, we have seen an increase in total Marlborough Job Seekers related to the impacts of COVID (currently up 400 on pre-COVID numbers), we have still been able to place more Job Seekers than ever into employment.

This involved a real community effort, recognising the work MSD's Employment & Labour Market team are doing alongside our regions Employers with great partnership support from groups like the Marlborough Regional Skills Leadership Group and TEAM.

While it is positive to see fewer younger people on the jobseeker register, older groups have remained higher. For more detailed information on Job Seeker number see Appendix B.

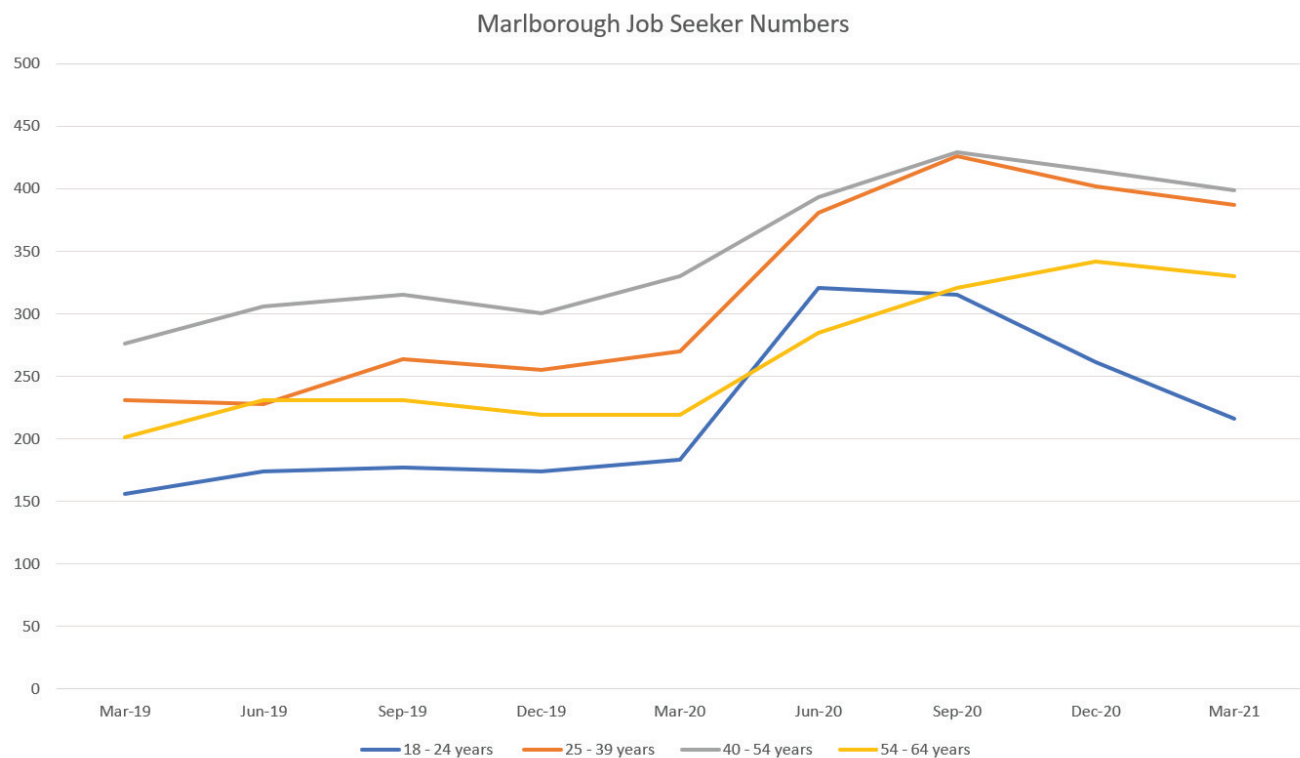
Please note that the above job seeker data does not include those who received the interim COVID-19 relief funds or people not in work who cannot access a benefit due to their partners' income.

The chart below shows the Marlborough unemployment rate against the national average. Note that:

- The Marlborough percentage is significantly lower than the national average; and
- The percentage of unemployed has dropped in Marlborough by 0.3% between 2020 and 2021, however nationally in the same period there has been a 0.6% increase.

	National percent of population	Marlborough percent of population
2019	4.3%	3.4%
2020	4.1%	2.8%
2021	4.7%	2.5%





This chart includes all Job Seekers, including work ready and those with a health condition or disability. It excluded those on the special COVID Income Relief Payment (in the first week of July 2020 there were 153 people on the special COVID Relief Payment).

*“ Well, I actually see a future, which is good. I know what I want to aim for. I have learnt... it’s hard to explain because there is so much. I have really learnt a lot about myself, and especially having a job I want to get into that has all of the things I’m interested in and, well, seeming like it is possible – it’s not that far off sort of thing ”*



## Industry Insights

The following insights are a collation of information across sources.

### Wine

TEAM research indicates that the impact of COVID-19 on the wine industry to date has been mixed.

The 2020 vintage began as the lockdown was getting underway, and the majority of the temporary labour had already arrived in New Zealand before lockdown. Wine was considered an essential industry that was able to operate, but significant changes to practices were required to minimise the risk of spreading COVID. This led to increased costs on the industry as workers were put into operational and accommodation bubbles. Sales of wine in international and domestic markets were strong, albeit requiring some brands to change from restaurant type sales to supermarkets. Sales held up in the key Australian, US and UK markets, and the majority of the 2020 vintage was sold.

The 2021 vintage faced different challenges, as the usual overseas temporary labour supply was severely constrained, putting more pressure on the staff already in New Zealand during vintage and winter pruning and increasing labour costs. No work 'bubbles' were required as in 2020. Adverse growing conditions meant that the 2021 vintage was around 21% (data from NZ Wine Growers) smaller than average overall, which puts financial strain on the industry at a time when the costs of the 2020 vintage were being managed. Looking ahead, there is positivity in terms of planned future plantings of 5,000 additional hectares by 2025 and the expected strong demand for the limited 2021 supply of wine and beyond.

“Smaller players have had to reinvent their sales – online etc”





TEAM survey (94 primary/manufacturing businesses, including wine, surveyed in Feb/Mar 2021)

## Impact shown as positive where better than survey average

57%

noted an overall negative impact of COVID-19 on their business (58% all businesses).

16%

(primary) and 12% (manufacturing) noted an overall positive impact on their business (18% overall).

49%

indicated a negative revenue impact (55% overall).

12%

(primary) and 35% (manufacturing) let people go in the past twelve months (15% overall).

53%

(primary) and 59% (manufacturing) found difficulty recruiting in the past 12 months (39% overall).

## Key quotes:

“Better than expected impacts from COVID-19”

“Wine sales have been strong. Smaller players have had to reinvent their sales – online etc”

“Stress on balance sheets – COVID-19 and low 2021 harvest”

## Outlook

39%

(primary) and 41% (manufacturing) noted a stronger overall outlook in the next six months (30% overall).

33%

(primary) and 41% (manufacturing) indicated a stronger profitability/revenue outlook (28% overall).

26%

(primary) and 29% (manufacturing) noted a stronger capital expenditure outlook (18% overall).

## Other data:

- » NZ wine exports total value \$1.89 billion (down 2%) compared to the previous year (as of April 2021).
- » Average value per litre \$8.25 (up 12%) compared to April 2020.
- » Exports to Australia grew 15%, but US and UK down 3% compared to the previous year.
- » Transport and supply chain problems moving stock, goods and components.
- » Low 2021 harvest combined with higher 2020 costs could impact investment.

## Aquaculture and Fishing

TEAM research indicates that the impact of COVID-19 on the aquaculture industry to date was initially significant but has improved.

After lockdown, the industry faced a loss of six month forward orders for mussel exports and change from restaurant to retail sales. The major export market for NZ mussels changed from the US to China until February 2021, when it reverted to the US. Marlborough produces 65% of mussels in New Zealand. Over the year to March 2021, mussel exports (which accounts for 90% of mussel sales) fell 16% by value and 11% by tonnage. Price per kg fell from \$9.90 in March 2020 to \$8.78 in March 2021. Export of mussel oil, however increased by 65% in price and 50% in tonnage over the same period, and the price increased from \$1,950 per kg to \$2,086 per kg.

Salmon exports also saw a shift from restaurant to retail, with a fall in chilled exports and an increase in frozen fillets and whole exports. 56% of New Zealand salmon is from Marlborough, and 41% of all New Zealand salmon is exported.

Mussel processing was initially hit as factories reduced from two shifts to one but later reverted to two shifts as demand increased. Factories faced problems hiring people as production increased, and labour costs have increased due to competition for labour from various industries.

COVID-19 significantly impacted Marlborough's commercial fishing businesses. The fresh rock lobster export market is important for a number of Marlborough Cook Strait and East Coast focused businesses. China dominates the rock lobster market, and the closure of that market in February 2020 had an immediate impact on export sales. However, sales and prices rebounded well later in 2020 and have held into 2021 as market conditions improved for New Zealand exporters.

*“ Competition from other sectors for lower-skilled labour ”*





TEAM survey (94 primary/manufacturing businesses, including aquaculture, surveyed in Feb/Mar 2021).

## Impact shown as positive where better than survey average

57%

noted an overall negative impact of COVID-19 on their business (58% all businesses).

16%

(primary) and 12% (manufacturing) noted an overall positive impact on their business (18% overall).

49%

indicated a negative revenue impact (55% overall).

12%

(primary) and 35% (manufacturing) let people go in the past twelve months (15% overall).

53%

(primary) and 59% (manufacturing) found difficulty recruiting in the last 12 months (39% overall).

## Outlook

39%

(primary) and 41% (manufacturing) noted a stronger overall outlook in the next six months (30% overall).

33%

(primary) and 41% (manufacturing) indicated a stronger profitability/revenue outlook (28% overall).

26%

(primary) and 29% (manufacturing) noted a stronger capital expenditure outlook (18% overall)..

## Other data:

- » Marlborough produces 65% of NZ mussels and 56% of NZ salmon.
- » 90% of mussel products are exported, 41% of salmon products.
- » Mussel exports down 16% value/11% tonnage year on year
- » Salmon exports overall were down 10% value/up 9% by tonnage.
- » NZ rock lobster exports for the four months ending April 2021 increased 81% by volume and 156% by value by compared to the corresponding period in 2020.

## Key quotes:

- “Reliance on restaurants knocked volume and price considerably”
- “Transport, especially lack of flights, was an issue for salmon”
- “Factories trying to get back to full production but can’t find the staff”
- “World market conditions impact mussel sales”
- “Competition from other sectors for lower-skilled labour”

## Visitor Economy

TEAM research indicates that the impact of COVID-19 on the visitor industry to date has been significant, particularly in Picton and North Marlborough, and is not expected to return to pre-COVID levels for some time to come.

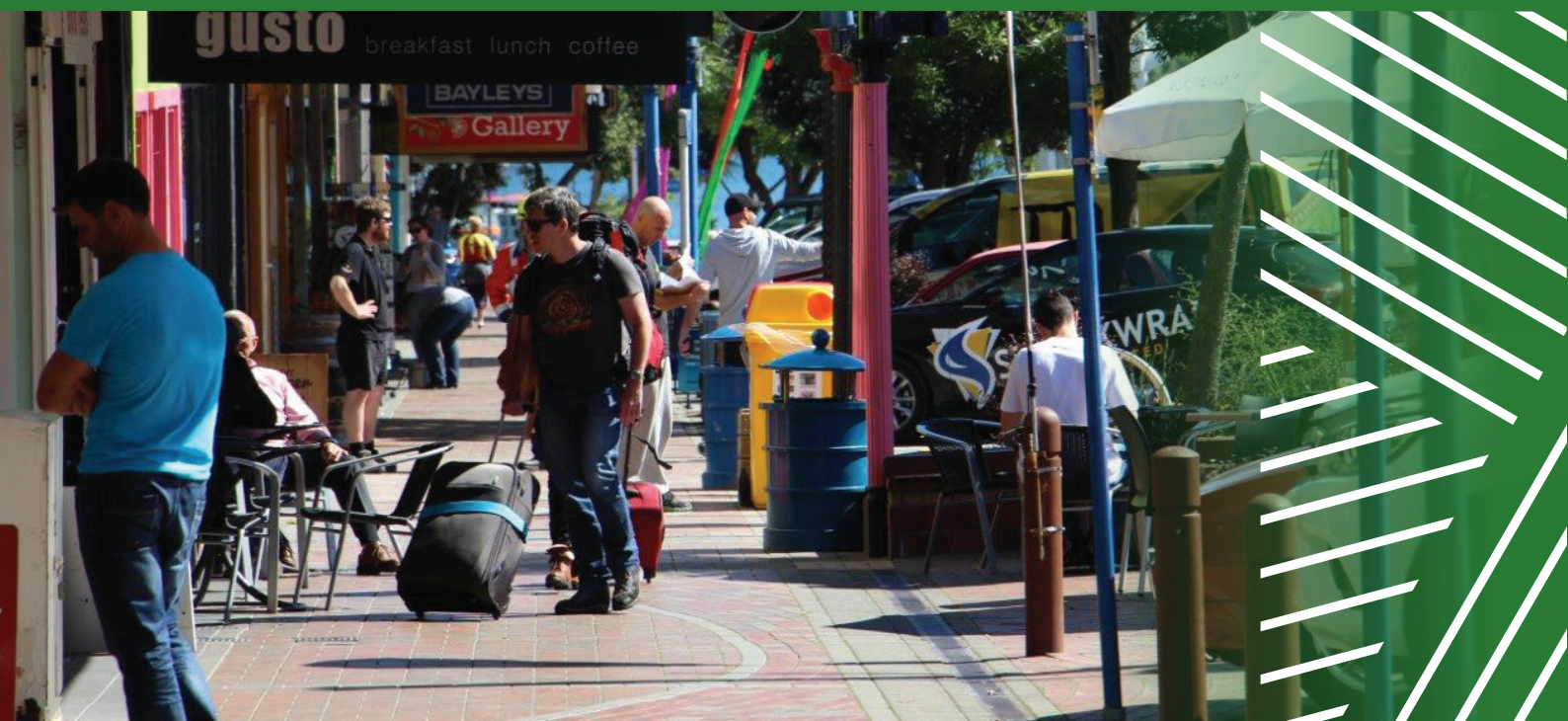
The visitor industry was one of the first industries to be impacted by COVID-19 as international borders closed towards the end of the busy summer season, and domestic lockdown began in late March 2020. Borders remained closed until March 2021, when travel by Australians was allowed. Consequently, the visitor economy has been entirely reliant upon local spend by Marlburians and domestic visitation. As well as restricting travel, visitor economy businesses were unable to access labour as inward migration of workers was also curtailed.

The impact of COVID varied across Marlborough as Picton, and the Sounds is more heavily reliant upon visitors than other parts of the region – 50%-70% compared to 30% elsewhere. Total spend in Picton and North Marlborough fell by 7.5% and 4.7%, respectively. International visitors usually account for approximately 20% of spend in North Marlborough, but this fell to less than 3% in the past year. Some of the loss in spend here was made up by increased visitation from across New Zealand, particularly the North Island and Christchurch. In Picton, spend fell more sharply on visitor specific items such as accommodation (-16%), other spend including transport and visitor activities (-40%) and apparel/personal (-43.5%) over the year to March 2021. However, cafes and restaurants spend slightly increased (0.3%) in Picton. It is not known whether the increased level of domestic visitation is sustainable into the future.

In Blenheim, overall spend is significantly weighted towards locals, and thus was less exposed to loss of visitors whilst also benefitting from increased domestic visitation. Overall spend fell only 0.7% in Blenheim Central and increased 0.2% in wider Blenheim over the year to March 2021. However, as with Picton, there were more significant decreases on more visitor specific spend items such as accommodation (-17% in wider Blenheim) and other spend including transport and visitor activities (-72% in Blenheim Central). Cafes and restaurants spend increased by 6.4% in Blenheim Central and 5.3% in wider Blenheim. Elsewhere in the region, South Marlborough overall spend fell 11%, whilst Renwick area increased by 8%. A survey of business occupancy rates in Blenheim's Central business district in February 2021 showed that occupancy held steady over the year, with just one additional vacancy from the survey in 2019 prior to COVID-19.

Responses to the TEAM survey indicated a weaker outlook for the visitor economy compared to other key Marlborough sectors in the coming months, and 88% of businesses responding to the survey indicated a negative impact of another lockdown – the highest amongst industries surveyed.

*“ High short-term demand is harder to manage than longer-term demand that is planned and spread ”*





TEAM survey (94 tourism and hospitality businesses, surveyed in Feb/Mar 2021).

## Impact shown as positive where better than survey average

**71%** noted an overall negative impact of COVID-19 on their business (58% all businesses)

**14%** noted an overall positive impact on their business (18% overall).

**72%** indicated a negative revenue impact (55% overall).

**20%** let people go in the past twelve months (15% overall).

**39%** found difficulty recruiting in the last 12 months (39% overall).

## Outlook

**19%** noted a stronger overall outlook in the next six months (30% overall).

**17%** indicated a stronger profitability/revenue outlook (28% overall).

**11%** noted a stronger capital expenditure outlook (18% overall).

## Other data:

- » The loss of cruise ship visits in 2020/21 meant around 100,000 expected visitors did not come to Marlborough.
- » NZ travellers spend less than international visitors on average.
- » Activity-based businesses such as kayaking, mountain biking has been particularly hard hit.
- » Capacity has been lost in some businesses and services as costs have been cut.
- » A less busy summer season and no wage subsidy in 2021 will impact the resilience of tourism businesses over the usually quieter winter period.
- » The benefit of more Australian visitors may be offset by fewer domestic visitors holidaying in New Zealand

## Key quotes:

“NZ people are amazing at travelling but are not spending as much as internationals”

“High short-term demand is harder to manage than longer-term demand that is planned and spread”

“Some businesses are saying they have had the best summer ever”

“Another wage subsidy could help us retain staff this winter”



## Forestry and Farming

TEAM research indicates that the COVID-19 impact on forestry was initially significant but is now much improved. For farming, COVID-19 had an impact which has been magnified by other issues such as drought.

Forestry was another industry impacted very early when its major export market, China, went into lockdown in February, and consequently, export of logs came to a halt. It took some time to clear the inventory as China opened up again. Demand and log prices recovered and have remained strong. Processed wood has been in high demand domestically to support the strong housing development growth and other commercial projects. Significant supply constraints of processed wood have occurred in 2021. In Marlborough, the Timberlink sawmill closed in December 2020 following a decision by its Australian parent company to exit the New Zealand market, leaving only one sawmill in Marlborough. This led to a number of job losses, some of which were absorbed by the Kaituna sawmill as high demand for processed timber continued.

Farming in Marlborough has had a number of challenges in recent years, including earthquakes, drought and government regulatory changes, and the addition of COVID-19 to these challenges had added stress to this resilient sector. COVID-19 has had a limited impact directly, with dairy prices remaining strong, although there has been a fall in the price of red meat. Farmers in Marlborough who also have vineyards have been impacted by the smaller 2021 vintage. The sector has noticed an increase in competition and price for labour.

Responses to the team survey indicate a stronger outlook over the next few months for these industries.

*“Drought in the past two years has had a bigger impact on farming than COVID-19”*





TEAM survey (94 primary/manufacturing businesses, including forestry and farming, surveyed in Feb/Mar 2021).

## Impact shown as positive where better than survey average

**57%** noted an overall negative impact of COVID-19 on their business (58% all businesses).

**16%** (primary) and 12% (manufacturing) noted an overall positive impact on their business (18% overall).

**49%** indicated a negative revenue impact (55% overall).

**12%** 12% (primary) and 35% (manufacturing) let people go in the past twelve months (15% overall).

**53%** (primary) and 59% (manufacturing) found difficulty recruiting in the last 12 months (39% overall).

## Key quotes:

“Overall COVID-19 impact for forestry better than expected”

“Domestic and export wood demand is very good”

“Drought in the past two years has had a bigger impact on farming than COVID-19”

“Revenue for red meats down 20% due to reduced overseas demand in the region”

“Government interventions have hindered, not helped, farming”

## Outlook

**39%** (primary) and 41% (manufacturing) noted a stronger overall outlook in the next six months (30% overall).

**33%** (primary) and 41% (manufacturing) indicated a stronger profitability/revenue outlook (28% overall).

**26%** (primary) and 29% (manufacturing) noted a stronger capital expenditure outlook (18% overall).

## Other data:

- » 2019-2020 log exports through Picton port fell to 555,182 JAS (697,828 in 2018-2019).
- » The price of P40 pruned logs increased 40% from \$140 JAS m3 in March 2020 to \$200 JAS m3 in May 2021.
- » Timberlink sawmill closure in Blenheim in December 2020 led to the loss of 75 jobs.
- » Forecast dairy prices increased from (kgMS) \$5.40-\$6.90 range in May 2020 to \$7.45-\$7.65 in May 2021.



## Construction

TEAM research indicates that the COVID-19 impact on construction has mostly related to constraints in the supply of materials and labour.

The construction industry in Marlborough was busy prior to COVID-19, and apart from the lockdown period where activity was mostly halted, has returned strongly and faced increasing pressures. The post-COVID-19 focus on shovel-ready projects has increased the amount of work in the region as the new Blenheim library and art gallery, NZ wine centre and accelerated infrastructure works were added to the mix. Renovations and home improvements have also seen increased demand in the past year.

Labour supply has been an issue for the construction industry in recent years as activity has been strong across the whole country. The TEAM survey indicated that a higher-than-average number of construction businesses had let people go in the past year. The lack of immigration due to the lockdown has impacted across the construction industry as skilled labour for project development, and implementation has been less available. In the past six months, there has been a national shortage of building materials, including wood, steel and imported finished goods. This has added challenges to an industry facing increased pressures of additional work and a shortage of labour. The TEAM survey noted the 57% of construction business had difficulty recruiting staff since COVID-19, and 45% expected stronger staffing levels in the coming months.

The TEAM survey indicated a positive outlook for the construction industry in the coming months. However it was noted that the lower harvest and drought may impact commercial developments.

*“Need more zoning, infrastructure, to provide more houses for workers in the region”*





TEAM survey (72 professional/admin/construction businesses surveyed in Feb/Mar 2021).

## Impact shown as positive where better than survey average

**64%**

noted an overall negative impact of COVID-19 on their business (58% all businesses)

**21%**

noted an overall positive impact on their business (18% overall).

**58%**

indicated a negative revenue impact (55% overall).

**21%**

let people go in the past twelve months (15% overall).

**57%**

found difficulty recruiting in the past 12 months (39% overall).

## Key quotes:

“Really good year, better than we thought”

“Aluminium, steel and timber supply is short, and prices are high”

“Builders giving up hiring skilled staff, trying apprenticeships instead”

“Need more zoning, infrastructure, to provide more houses for workers in the region”

## Outlook

**45%**

noted a stronger overall outlook in the next six months (30% overall).

**42%**

indicated a stronger profitability/revenue outlook (28% overall).

**18%**

noted a stronger capital expenditure outlook (18% overall).

## Other data:

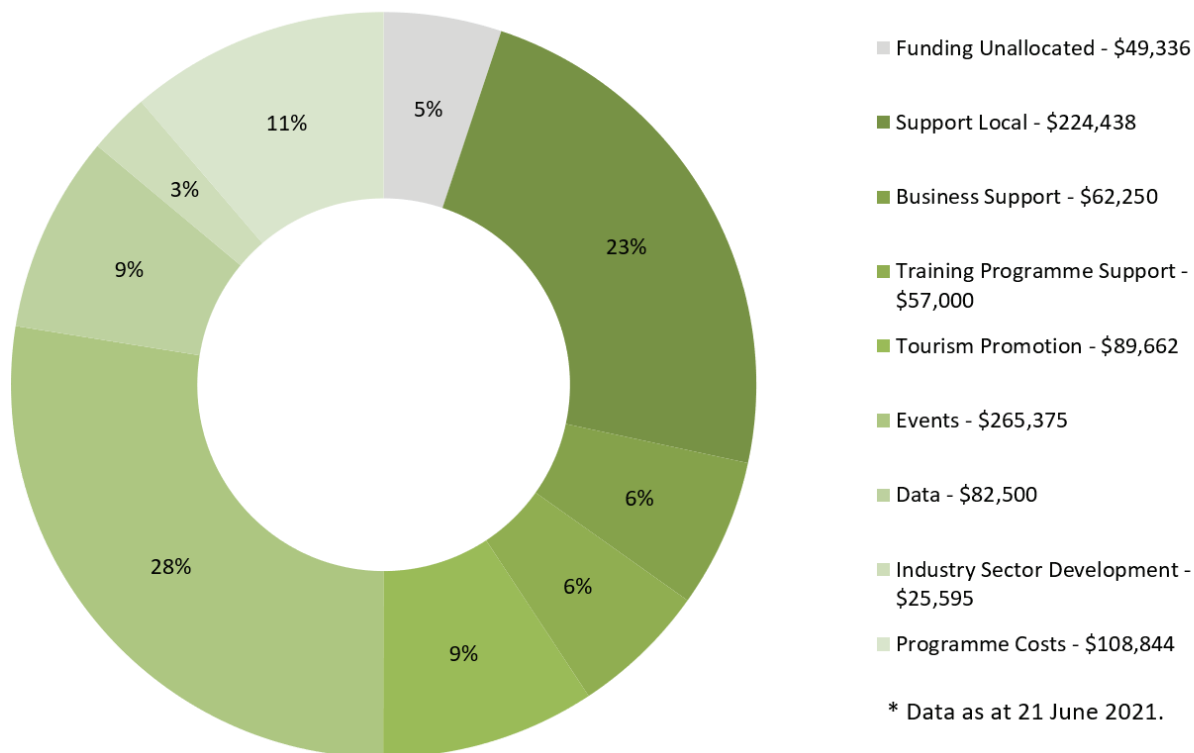
- » Harder to get bank finance for developments in the last year.
- » Need to open up more land for zoning and accelerate infrastructure development to enable more housing.
- » Increased inventory to ensure the ongoing supply of materials for projects.
- » Large public projects in upcoming years, including combined Blenheim colleges and Picton port redevelopment, will further exacerbate labour issues.
- » The annual growth rate of constructions cost up 3.3% in quarter one 2021.

## TEAM Interventions

### Funding

Marlborough District Council provided TEAM with a budget of \$965,000 from the Marlborough District Council Emergency Events Reserve. This fund comes from reserves and does not impact rates.

Further details of where funding has been spent can be found in the six weekly reports to the Planning, Finance and Community meetings on the Marlborough District Council Website.



### Benefits received

**BUSINESSES  
ASSISTED**

29

**EVENT ATTENDEES**

44,011

**Young people receiving  
work-readiness training**

40

**ESTIMATED  
ECONOMIC  
BENEFIT**

\$6.25M

**Government  
shovel-ready  
funding**

>\$30M

## Support Local



## Project name:

'Make it Marlborough' Campaign

## Project partner:

Destination Marlborough / MCOC

## Project funding:

\$164,438

## Business listings:

208

## Town activation days:

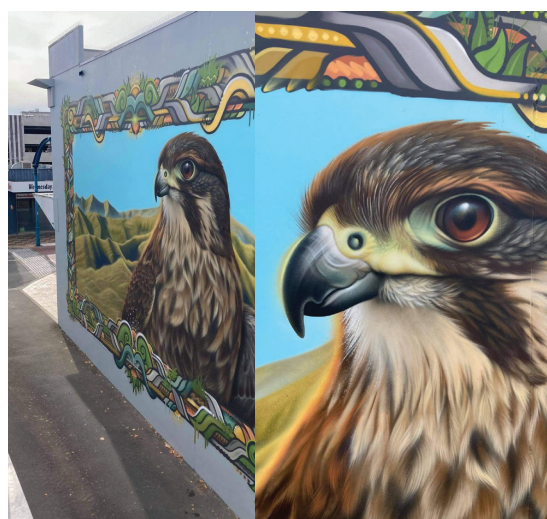
7

## Social media reach:

295,000+

## Project description:

Working in partnership, Destination Marlborough and the Marlborough Chamber of Commerce (MCOC) created a coordinated campaign across multiple platforms to support local businesses, tourism operators, hospitality outlets, producers and retailers. The key objectives of the campaign were to activate and drive business to the local economy, to support all businesses employing Marlburians, to enliven townships and to engage proud Marlborough advocates. The campaign also aimed to educate the local community about the products, services and experiences available within the region and to increase community and civic pride



## Project name:

Blenheim CBD Activation Projects

## Project partner:

Blenheim Business Association

## Project funding:

\$55,000

## Activation projects:

4

## Street-art murals:

6

## Social media reach:

2,500+

## Project description:

Recognising the increased need to encourage visitation to Blenheim's CBD, the Blenheim Business Association (BBA) were awarded funding for a series of public space activation projects. A key element of the plan is a series of street-art murals located throughout Blenheim CBD.



## Project name:

The Plant Music Venue Relocation

## Project partner:

The Plant

## Project funding:

\$5,000

## Previous venue capacity:

80

## New venue capacity:

100

## % Capacity increase:

25%

## Project description:

Local music venue The Plant has been increasingly successful in attracting live music events to Marlborough. With the current venue size prohibiting larger, more popular acts from adding Marlborough to their tour dates - funding was provided to assist a move to a larger venue, thus allowing The Plant to attract more entertainers to the region.



## Business Support



**Project name:**  
Small Business Professional  
Advice Services

**Project partner:**  
Business Trust Marlborough

**Project funding:**  
\$50,000

### Project description:

Business Trust Marlborough received funding to operate a business support scheme for smaller businesses within the region who did not qualify for central government support via the Regional Business Partner Network programme. Vouchers totalling \$500 were made available for non-GST registered businesses to access professional help and guidance for business recovery. The scheme was also designed for the vouchers to be spent with Marlborough-based advisors, thus aligning with the objectives of the 'Make it Marlborough' campaign.

**Businesses assisted:**  
86 (vouchers  
awarded)



**Project name:**  
Business Support Voucher +  
Webinars Series

**Project partner:** Marlborough  
Chamber of Commerce

**Project funding:**  
\$12,250

### Project description:

Based on a 'one-to-many' approach, Marlborough Chamber of Commerce were awarded funding to provide a series of six webinars covering various business support topics. The six webinars were:

- Cashflow, Budgeting and Tax Relief;
- Building Sustainable Sales Growth in a Changing Market;
- Business Continuity Planning;
- Bouncing Forward from a Crisis;
- Leadership and Strategy/Pivoting your business; and
- Transition your business online

Webinar attendees were then eligible for a \$250 voucher for a one-on-one session with a local professional advisor as needed.

**Businesses assisted:**  
21 (vouchers  
awarded)

**Webinar attendees:**  
99

## Training Programme Support



Project name:  
MBC - Gateway Programme Ext.

Project partner:  
Marlborough Boys College

Project funding:  
\$10,000

Young people  
receiving  
work-readiness  
training:  
11

#### Project description:

The Gateway Programme is a Ministry of Education funded initiative to enable secondary students to access structured workplace learning to support their transition into the workforce. Recognising that younger members of the workforce have been more adversely affected by the pandemic than older age groups – Marlborough Boys College were awarded funding to extend their Gateway programme from 49 to 60 students for the 2021 academic year.



Project name:  
QCC - Gateway Programme Ext.

Project partner:  
Queen Charlotte College

Project funding:  
\$7,000

Young people  
receiving  
work-readiness  
training:  
10

#### Project description:

Queen Charlotte College in Picton also operates the Gateway Programme, and funding was awarded to allow additional students to complete courses in diving, boat-skippering and life-guarding as a pathway to future employment. Courses were completed at the end of the 2020 academic year.

*“ I really love my work placement. The people are great. They take time to teach me new skills and I am glad I chose this place. I try to help out as much as I can so that they are impressed with me. I would love a job here ”*

MBC Gateway Programme extension



## MARLBOROUGH GIRLS' COLLEGE

*Te Kāreti Kōhine o Wairau*

**Project name:**  
MGC - Youth Employment  
Programme

**Project partner:**  
Marlborough Girls College

**Project funding:**  
\$10,000

Young people  
receiving  
work-readiness  
training:  
10

### Project description:

Similar to the Gateway programme, Marlborough Girls College (MGC) also operate a Youth Employment Programme providing skills to students to better enable them to have a successful transition from school to work. The funding awarded will allow a cohort of 10 students to complete the Programme in the 2021 academic year.



**Project name:**  
Career Navigator - Community  
Programme

**Project partner:**  
Graeme Dingle Foundation (GDF)

**Project funding:**  
\$30,000

Young people  
receiving  
work-readiness  
training:  
9

### Project description:

The Graeme Dingle Foundation provides programmes focused on providing tools and strategies to help young people. Their Career Navigator programme is a career mentoring programme that builds links with local business and industry, assisting young people with the transition beyond the school gate. Ordinarily operating in schools, GDF received funding to pilot operation of the Career Navigator programme with 18-24 year-olds. With the under-30 age group identified as a group particularly affected by job losses due to COVID-19, the aim was to support young people into employment via an eight-week intensive programme. In total, nine young people participated in the Programme, with seven going on to work or study upon completion. Following successful completion of the pilot, MSD also agreed to fund a further three cohorts through the Programme.





## Tourism Promotion



**Project name:**  
Domestic Marketing Funding

**Project partner:**  
Destination Marlborough

**Project funding:**  
\$75,000

Change in  
domestic visitor  
spend:  
+39%  
(July 19 vs July 20)

### Project description:

Destination Marlborough are the region's Regional Tourism Organisation (RTO). With the loss of international tourists in the region due to border closures, Destination Marlborough were provided with additional funding to undertake a series of targeted domestic marketing campaigns (matched where possible with government funding) focused on realigning Marlborough to attract domestic market visitors. Initial priority campaigns were targeted at those within a few hours drive of Marlborough, e.g. Nelson and Canterbury. Additionally, Destination Marlborough worked with their counterparts in Nelson/ Tasman on wider 'Top of the South' marketing campaigns.



**Project name:**  
South Marlborough  
Tourism Project

**Project partner:**  
Awatere Valley Trust

**Project funding:**  
\$14,662

Participating  
businesses:  
35

### Project description:

In order to strengthen the South Marlborough business community, encourage investment and enhance economic recovery – this film project aims to create engagement through storytelling and to create a cohesive offer for visitors. Titled 'Maunga to Moana', the seven-episode project undertaken by local filmmaker Keelan Walker will showcase local producers, accommodation providers, iconic walkways, wineries in the region, glamping, and activities such as rafting and mountain biking.

*“ We wanted to put South Marlborough on the map. Until now, we have been the forgotten patch of Marlborough ”*

South Marlborough Tourism Project

## Events



**Project name:**  
Marlborough Event Guides

**Project partner:**  
Follow-Me /  
Marlborough District Council

**Project funding:**  
\$45,000

**Previous print run:**  
66,000 copies

**Increased print run:**  
134,000 copies

**% increase:**  
103%

**Project description:**

The Follow-Me Marlborough Events guides are produced and distributed four times a year to list and promote events in the region. Ordinarily, in Autumn, Spring and Winter, the guides are only distributed within Marlborough, with wider national distribution limited to the summer season. To encourage visitation to the region, funding was provided to increase the printing and distribution of the guides for the Autumn 2021, Spring 2021 and Autumn 2022 seasons outside Marlborough.



**Project name:**  
Summer Sounds Festivals

**Project partner:**  
The Queen Charlotte Tavern

**Project funding:**  
\$20,000 (underwriting support used)

**Event attendees:**  
1,058 (across two dates)

**Project description:**

The Queen Charlotte Tavern is located at Linkwater in the Marlborough Sounds. The objective of these events is to add an annual music festival to the national calendar, which will attract visitors and locals alike. Held over two separate dates in December 2020 and January 2021, the events received underwriting support which was partially drawn upon. Headline acts over the two dates included Bic Runga and Trinity Roots.



**Project name:**  
Blenheim CBD - Summer Market

**Project partner:**  
Pure Events Marlborough

**Project funding:**  
\$20,000

**Event attendees:**  
4,000

**Project description:**

With a key Marlborough event (the 2021 Wine & Food Festival) unfortunately cancelled due to risks associated with COVID-19, it was anticipated that there would still be a significant number of tourists in the region who had already committed to visit Marlborough. This event aimed to ensure that Blenheim CBD was showcased as a vibrant place, to showcase Marlborough produce and to provide entertainment for both visitors and locals alike. Feedback from both stallholders and CBD retailers was very positive, with many reporting strong sales.





**Project name:**  
Savour in Marlborough –  
Evening Market

**Project partner:**  
Pure Events Marlborough

**Project funding:**  
\$10,000

**Event attendees:**  
1,500

**Project description:**

This was a sister event to the CBD Summer Market occurring earlier in the day. Again, feedback from both stallholders and CBD retailers was very positive, with local restaurants and cafes reporting strong trade.



**Project name:**  
Marlborough's Summer Feast

**Project partner:**  
Feast Marlborough  
Charitable Trust

**Project funding:**  
\$49,845

**Events supported:**  
50

**Event attendees:**  
5,000+

**Social media reach:**  
180,000+

**Project description:**

The objective of the Summer Feast campaign was to coordinate a series of events throughout Marlborough's usually busy summer period to help offset the impact of COVID-19 on the local economy. Feast Marlborough worked alongside venues, food producers, event organisers and others to develop an exciting series of events during February and March 2021. The key focus of all events was the relationship with the region's food and beverage sector, thus providing the very best of experiences for both Marlburians and visitors.



**Project name:**  
Film + Feast: Outdoor  
Movie Events

**Project partner:**  
Marlborough Events Ltd

**Project funding:**  
\$11,678

**Event attendees:**  
1,100 (over three  
events)

**Project description:**

A portable cinema screen was brought to Picton foreshore for a series of three outdoor movie events. Attendance was free for these family-friendly evening events, which included food vendors and live entertainment from local community groups. The three movies shown were Mamma Mia, Alice in Wonderland and Yesterday.





Project name:

Bloom in the Boom

Project partner:

Garden Marlborough (2004) Inc.

Project funding:

\$0 (underwriting support not used)

Event attendees:

4,000

Project description:

Bloom in the Boom / Garden Marlborough is one of Marlborough's key major events, attracting thousands of visitors to the region every year. To provide the event with confidence to proceed, underwriting support was made available for the November 2020 event. Fortunately, the event preceded as planned with very strong attendance figures meaning that the available funds were not drawn upon.



Project name:

Havelock Mussel and Seafood Festival

Project partner:

Havelock Mussel Festival Inc.

Project funding:

\$0 (underwriting support not used)

Event attendees:

3,500

Project description:

The Havelock Mussel and Seafood Festival provides family-friendly music and entertainment whilst simultaneously promoting regional aquaculture produce. To provide the event with confidence, underwriting support was made available for the March 2021 event. Fortunately, the event proceeded as planned, and the underwriting support made available was not used.



Project name:

Saint Clair Vineyard Half Marathon

Project partner:

Not Just Events

Project funding:

\$15,000

Event participants:

2,500

Project description:

The Saint Clair Vineyard Half Marathon is one of Marlborough's key events. Unfortunately cancelled in 2020 due to COVID-19, this event returned in May 2021 under new ownership and successfully proceeded as planned. A one-off funding grant was provided to assist the new operator to re-establish the event.



**Project name:**  
Summer Vines Festival

**Project partner:**  
Jackson Estate Ltd

**Project funding:**  
\$8,696

**Event attendees:**  
1250

**Social media reach:**  
3,000+

**Project description:**

The Summer Vines event was a collaborative one-day festival brought together by a collection of Marlborough's iconic wine producers and led by the team at Jackson Estate. The free event attracted wine, food and music lovers from across Marlborough as well as drawing interest from Auckland, Christchurch, Hawkes Bay, and elsewhere in New Zealand. In lieu of the (cancelled) Marlborough Wine and Food Festival 2021, Summer Vines was successful in showcasing Marlborough as a destination for exceptional wine, food and entertainment.



**Project name:**  
An Evening with  
Méthode Marlborough

**Project partner:**  
Méthode Marlborough

**Project funding:**  
\$4,000

**Event attendees:**  
103

**Social media reach:**  
5,000+

**Project description:**

Méthode Marlborough is a non-profit organisation comprising of 12 member wineries, established with the aim of communicating the quality and heritage of Marlborough's traditional-method sparkling wines. The 'Progressive Evening' event visited three wineries to showcase the best of the region's sparkling wine over a social evening. Catering and live music were provided at each venue with the intention of highlighting the breadth of talent within the Marlborough region. This premium event was also attended by industry media to further promote the product and region outside Marlborough.

*“...the campaign was a success against all deliverables and, even more than that, the initiative delivered an important boost for the food and beverage sector in our region at a time when it was greatly required”*

Marlborough Summer Feast





**Project name:**  
Classic Fighters 2021

**Project partner:**  
Classic Fighters Airshow  
Charitable Trust

**Project funding:**  
\$80,000  
(inc. \$50,000 underwrite)

**Project description:**

The Classic Fighters airshow is one of Marlborough's premier events. The bi-annual event is internationally recognised and attracts tens of thousands of visitors to the region across three days. The event is normally held over Easter weekend but was postponed in 2020 due to the Covid-19 lockdowns. Rescheduled for Easter 2021, the event was unfortunately postponed once again due to the increase in Covid-19 alert levels in March 2021. TEAM Group funding was awarded to assist with marketing and promotion of the rescheduled event in September 2021 and to provide underwriting support should the event be cancelled.

**Event attendees:**  
20,000 (estimated)

## Data



**Project name:**  
Infometrics Economic Impact Reports

**Project partner:**  
Infometrics

**Project funding:**  
\$13,500

**Project description:**

In order to try and understand the potential economic impacts of COVID-19 on the Marlborough region, economics consultancy Infometrics were commissioned to produce two economic forecast reports. The early estimates report was received in May 2020, with a revised estimates report received in November 2020.



Project name: Marketview Subscription

Project partner: Marketview / Verisk

Project funding: \$50,000

#### Project description:

Marketview provide detailed information on consumer electronic card spend at regional and sub-regional level. A two year subscription to the service was funded to obtain key data on spend in the region, thus allowing a better understanding of the economic impact of COVID-19 on key sectors – particularly tourism, hospitality and retail, where electronic card spend is a significant portion of revenue.



Project name: COVID-19 Economic Impact Survey

Project partner: SIL Research

Project funding: \$19,000

#### Project description:

The objective of this research was to better understand the ongoing impacts of COVID-19 on the Marlborough business community to facilitate necessary and appropriate actions as part of the ongoing recovery work. A survey of 400 businesses was undertaken in February-March 2021, with all survey respondents at Director or Senior Management level in their respective organisations. The sample was stratified, and data collected by four geographical units (Blenheim, Wairau-Awatere, Marlborough Sounds and Picton) to ensure representation across the Marlborough region. The survey provided key information to aid decision-making and to assess sentiment amongst the business community.

## Industry Sector Development



Project name: Marlborough Film Studios Feasibility Study

Project partner: MDC / EY

Project funding: \$25,595

#### Project description:

This feasibility study was commissioned to review the potential of establishing screen production facilities to lead the development of a regional screen industry. The screen and interactive media sectors are one of the highest-potential and fastest-growing parts of the digital economy. The feasibility study will give clear answers on the viability and desirability of a studio investment in the Marlborough region. Nationally, there is a shortage of such facilities and attracting a new industry set to Marlborough could have a positive effect on local employment and regional GDP. Additionally, any new facilities could provide a visible career path for younger Marlburians in the fast-growing digital and screen industry sectors.





## The Future

TEAM's role is to fill the gap should one exist.

### Industry impacts

As part of our discussions with industry and the SIL business survey, TEAM asked businesses what support was required going forward. The responses can be summarised as follows:

Wine – a continued need for support on labour issues is being addressed as follows:

- The Regional Skills Leadership Group, Wine Marlborough, and Smart + Connected Labour and Skills group work on labour issues. These groups are providing input to the central government who are working on immigration policy and labour initiatives.
- Re-imagination work is ongoing in the industry, including AI, to fill some of the labour shortages.

Aquaculture and fishing – as with the wine industry, there is a continuing labour issue, which is exacerbated by COVID-19 as well as a supply chain issue. This is being addressed as follows:

- The Regional Skills Leadership Group, The Marine Farming Association and the Smart + Connected Labour and Skills group work on labour issues. These groups are providing input to the central government who are working on immigration policy and labour initiatives.
- Through the Ministry of Business Innovation and Employment, the central government has an overarching role in identifying ways to mitigate supply chain issues. However, it is important to note that this is an issue that has a global reach.
- MPI has a long term strategy for Aquaculture ([www.mpi.govt.nz/fishing-aquaculture/aquaculture-fish-and-shellfish-farming/aquaculture-strategy-for-new-zealand/](http://www.mpi.govt.nz/fishing-aquaculture/aquaculture-fish-and-shellfish-farming/aquaculture-strategy-for-new-zealand/))
- Re-imagination work is ongoing in this industry, including the review of nutraceutical uses for mussel powder and oil and the potential automation of harvesting.

Visitor Economy – this is the industry with the highest continuing impact. The Picton and Sounds area is the most geographically impacted in Marlborough. This is being addressed as follows:

- The MDC Economic Development team have added COVID-19 to their areas of focus and will continue to use the Marketview data (which has been funded by TEAM through to February 2023) and other sources to track the need for interventions.
- The remaining TEAM funding (\$49,336) from the Council Emergency reserve fund will remain available to support the visitor economy. The MDC Economic Development team and Destination Marlborough will ensure that those who have ideas for interventions are aware of the support available, the links will remain on the MDC website for applications (with updated criteria) and Cllr Mark Peters and Mayor John Leggett will review and make decisions on any applications received.
- Government support for tourism and events is critical for the future period until international visitors return.
- Destination Marlborough is working on the Regional Events fund (with MDC) and the Strategic Tourism Asset Protection Programme and a Destination Management plan for the region.

*“WOW WOW WOW....hope you do more around town, would be a good art walk”*

Blenheim CBD Activation feedback



Construction – continued concerns around the availability of skilled workers for this sector and housing supply is being addressed as follows:

- The Regional Skills Leadership Group and the Smart + Connected Labour and Skills group work on labour issues. These groups are providing input to the central government who are working on immigration policy and labour initiatives.
- MDC continues to work on infrastructure development, including existing zonings and considering further zoning changes.
- iRSLG, Smart + Connected Labour & Skills tasked with working on labour issues.
- Government role in supply chain issues.
- Council to continue to push on infrastructure development, consider more zoning
- The central government, along with the private sector, has the most significant role to play.
- The Workforce Information Platform (WIP) is a forecasting tool that displays national, regional gaps and surpluses within the construction and infrastructure labour market. BCITO has led work on this tool. It can be found at [wip.org.nz](http://wip.org.nz).

Forestry and farming - as with the other industries, there is a continuing labour issue, which is exacerbated by COVID-19 as well as a supply chain issue. This is being addressed as follows:

- The Regional Skills Leadership Group and the Smart + Connected Labour and Skills Group work on labour issues. These groups are providing input to the central government who are working on immigration policy and labour initiatives.



## Other economic recovery actions

Other agencies are also working hard on COVID-19 economic recovery, for example:

- The central government has a significant investment in COVID-19 recovery. A sample of these include (links to sources can be found in Appendix E);
  - Significant investment in training, employment and redeployment through MSD;
  - MBIE investment in digital booster work;
  - The regional tourism support recovery and re-set investment plan with funding of \$26M across the country. Destination marketing and destination management plan. Product development (out of the plan) Industry capability – upskill operators. More funding to market to New Zealanders and Australians;
  - Tourism Infrastructure funding with Marlborough District Council and Destination Marlborough;
  - New industry transformation plan - \$10M nationally "sustainable model.";
  - Pick a path – Domestic OE;
  - Connected website and resources in Regions; and
  - The minister of Tourism is also the minister for small and medium enterprise and Economic development.
- iRSLG - Regional Skills Leadership Groups were formed in June 2020 on an interim basis to gather intelligence about the impacts of COVID-19 on the regional labour market and to identify and support better ways of meeting future skills and workforce needs in our regions. They are part of a joined-up approach to labour market planning which will see our workforce, education and immigration systems working together to meet differing skills needs across the country better. Functioning independently, the groups are regionally based and regionally led and supported by a team of data analysts, advisors and workforce specialists at the Ministry of Business, Innovation & Employment.
- MDC Economic Development team
  - This team formed the core of the TEAM Project team and will continue to track and manage outstanding projects and funding and assist new applicants;
  - Development of new economic development strategy for Marlborough;
  - Will continue to use market view to understand the impacts of COVID-19 and inform interventions; and
  - Part of their core role is looking at re-imagination opportunities in the region, including how to bring new industries and workers to the region.
- Marlborough District Council
  - The Council has addressed COVID-19 impacts in the long term plan. Note that TEAM came out of emergency reserves and did not impact rates. There are further supports documented within the long term plan, including:
    - Delivering its largest capital expenditure programme ever;
    - Continue one-hour free parking;
    - Established a COVID Rates Relief Fund of \$12.6 M out of reserves over the next three years;
    - Increased distribution of events guides nationally; and
    - Bringing forward infrastructure investment.
- Destination Marlborough
  - Working across the Top of South with Nelson Tasman to access central government funding; and
  - Working on destination marketing, industry capability and product development and the creation of a destination management plan for the region.



- Te Taihu iwi
  - The eight tangata whenua iwi in Te Taihu (Ngāti Tama ki Te Taihu, Te Ātiawa o Te Waka-a-Māui, Ngāti Rārua, Ngāti Koata, Ngāti Toarangatira, Ngāti Kuia, Ngāti Apa ki te Rā Tō, and Rangitāne o Wairau) have formed a charitable trust (Te Kotahi o Te Taihu) to help whānau to thrive post COVID.
  - The strategic plan for Kia Kotahi te Hoe, is a collaborative effort firmly focussed on creating the best conditions for whānau to thrive.
  - Working with crown partners, the charitable trust will enable iwi to support recovery and make long-term gains for whānau.
  - Focus items include collaborating as iwi, hapū and marae, with central and local government, to feed and house whānau in need and ensure there are opportunities for training and meaningful work. This is holistic wellness coordination across many organisations and delivered to where it is most needed.
- Other
  - Chamber of Commerce and Business Trust Marlborough continue their work to champion and support local business;
  - Smart + Connected industry groups to continue to work on collaborative programmes to support their industry; and
  - The Graham Dingle Foundation and secondary schools continue to work on pathway to work programmes.





## Conclusion

This report was initially intended to set out the second phase of the Marlborough economic recovery plan to the COVID-19 pandemic. However, the data and feedback received have shown a return to normal for many of our businesses.

There are continuing impacts to:

- Specific industries (tourism is highly impacted);
- Geographies (Picton, the Sounds and South Marlborough); and
- Labour.

However, given the feedback received and the work that is currently underway through agencies such as MBIE, MSD, and iRSLG (to name a few), the decision has been made to wrap up this programme of work and move the responsibility for actions to address the economic impacts of COVID-19 on the Marlborough region into the remit of BAU.

Key actions move back to Destination Marlborough and the Economic Development team at MDC. The Mayor and Cllr Mark Peters will also continue to review any applications received for funding, focusing on those areas (Picton and the Sounds) and industries (tourism and hospitality) still suffering the most.

Internationally, COVID-19 is not under control, and the impact on New Zealand will depend heavily on whether the border remains closed and if the virus enters the New Zealand community again. The Marlborough District Council will keep a watching brief on the situation and may reconvene TEAM if required.



## Appendices

### A –TEAM Membership

Group	Membership	Mandate
Governance Group	<p>Marlborough District Council</p> <ul style="list-style-type: none"> <li>• Clr Mark Peters (Chair);</li> <li>• Clr Gerald Hope; and</li> <li>• Clr David Croad.</li> </ul> <p>Central government</p> <ul style="list-style-type: none"> <li>• Craig Churchill (Regional Commissioner for the Top of the South, Ministry of Social Development).</li> </ul> <p>Iwi</p> <ul style="list-style-type: none"> <li>• Vennessa Ede (Te Ati Awa).</li> </ul> <p>Industry Representatives</p> <ul style="list-style-type: none"> <li>• Lynette Rayner (Director - Accounting Plus, Chair – Blenheim Business Association, Chair – Marlborough Boys College Board);</li> <li>• Maria Baxter (Founder – Sounds Connection); and</li> <li>• Tony de Reeper (Director – Wallace Diack Chartered Accountants).</li> </ul>	<p>The purpose of the TEAM Governance Group is to:</p> <ul style="list-style-type: none"> <li>• Ensure actions identified in Phase One are resourced and followed through;</li> <li>• Report back to the Council and community on Phase One;</li> <li>• Understand the ongoing impacts of COVID 19 on the Marlborough community;</li> <li>• Report on findings;</li> <li>• Facilitate necessary and appropriate actions as part of ongoing recovery and re-imagination from COVID 19; and</li> <li>• Advocate for sufficient resources to complete appropriate actions for recovery and re-imagination.</li> </ul>
TEAM Programme Office	<p>Neil Henry (Economic Development Manager – MDC);</p> <p>Alan Simpson (Economic Development MDC); and</p> <p>Liz Webb (Practics)</p>	<p>The programme office's role was to:</p> <ul style="list-style-type: none"> <li>• support the Governance and working groups; and</li> <li>• provide analytical support, data and programme expertise, along with running the Programme of work under the TEAM banner.</li> </ul>
Expert Panel	<p>Membership has varied slightly since its inception in August 2020. On average, there have been approximately 100 members.</p> <p>Skills include:</p> <ul style="list-style-type: none"> <li>• Central government (MSD, MOH (Ministry of Health), MBIE (Ministry of Business Innovation) and Public Sector Lead for Top of the South);</li> <li>• All MDC Councillors;</li> <li>• Iwi Chairs and CE/GM's;</li> <li>• Advisers (Including Accountants, Lawyers, Bankers, Immigration);</li> <li>• Industries (Including Farming, Tourism, Aquaculture, Wine); and</li> <li>• Organisations (including the Chamber of Commerce, Business Trust Marlborough, Blenheim Business Association).</li> </ul>	<p>Made up of experts in our community who have kindly offered their time and knowledge to help inform our regions recovery from COVID-19.</p> <p>The monthly Expert Panel newsletter and survey is also sent to those otherwise involved in TEAM.</p>

<p>Tourism, Retail and Hospitality Working group</p>	<p>MDC</p> <ul style="list-style-type: none"> <li>• Clr Mark Peters;</li> <li>• Neil Henry (Economic Development);</li> <li>• Alan Simpson (Economic Development); and</li> <li>• Sam Young (Events).</li> </ul> <p>Destination Marlborough</p> <ul style="list-style-type: none"> <li>• Jacqui Lloyd,</li> </ul> <p>Industry Representatives</p> <ul style="list-style-type: none"> <li>• Maria Baxter (Sounds Connection);</li> <li>• Lynley Perkins (Pelorus Promotions/ Sounds Advisory Group);</li> <li>• Olivia Doonan (Tupari Wines);</li> <li>• Sarah Bates (Kiwi Clean Living);</li> <li>• Caroline Stone (Blenheim Business Association); and</li> <li>• Dion Brown (Origin South Food Co &amp; FEAST Marlborough).</li> </ul> <p>Liz Webb (TEAM Programme Office).</p>	<p>These three industries were the hardest hit by the economic impacts of COVID-19 at the time Phase Two convened.</p> <p>This group has been convened to bring together experts in the industries to work together to identify solutions to issues seen.</p> <p>It includes representatives from Picton, Blenheim, Havelock &amp; Sounds, East Coast &amp; Awatere, Destination Marlborough and the Restaurant Association.</p>
<p>Labour and Business Support working group</p>	<p>Central government</p> <ul style="list-style-type: none"> <li>• Michelle Martin (MSD);</li> <li>• James Ryan (Connected GOVT); and</li> <li>• Lianne Nichols (MSD).</li> </ul> <p>Business Trust Marlborough</p> <ul style="list-style-type: none"> <li>• Brian Dawson.</li> </ul> <p>iRSLG</p> <ul style="list-style-type: none"> <li>• Brendon Burns.</li> </ul> <p>Marlborough Chamber of Commerce</p> <ul style="list-style-type: none"> <li>• Pete Coldwell.</li> </ul> <p>TEAM Programme Office</p> <ul style="list-style-type: none"> <li>• Neil Henry;</li> <li>• Alan Simpson; and</li> <li>• Liz Webb.</li> </ul>	<p>As labour and business support is a large part of the impact of COVID-19 on the Marlborough region, this piece of work has been stood up to help providers understand any gaps between the services provided and the impacts seen in the region and work to close these gaps.</p> <p>Youth and other job losses were identified as a key impact of the pandemic.</p> <p>Labour projects are the mandate of MSD.</p> <p>The central government has also set up iRSLG's which convened in July, and the Connected Programme.</p> <p>Business Support lies with a range of providers, including NZTE funding administered through the Marlborough Chamber of Commerce and TEAM funded vouchers administered by Business Trust Marlborough.</p>
<p>Data working group</p>	<p>Governance Group Representative</p> <ul style="list-style-type: none"> <li>• Clr Gerald Hope.</li> </ul> <p>TEAM Programme Office</p> <ul style="list-style-type: none"> <li>• Neil Henry;</li> <li>• Alan Simpson; and</li> <li>• Liz Webb.</li> </ul>	<p>To understand the impacts on the region, data is required.</p> <p>This group focused on sourcing, collecting and collating data.</p> <p>Sources include:</p> <ul style="list-style-type: none"> <li>• MSD;</li> <li>• Infometrics;</li> <li>• SIL Business Survey;</li> <li>• Industry Forums;</li> <li>• Insights from the Expert Panel; and</li> <li>• Marketview Consumer spend data.</li> </ul>

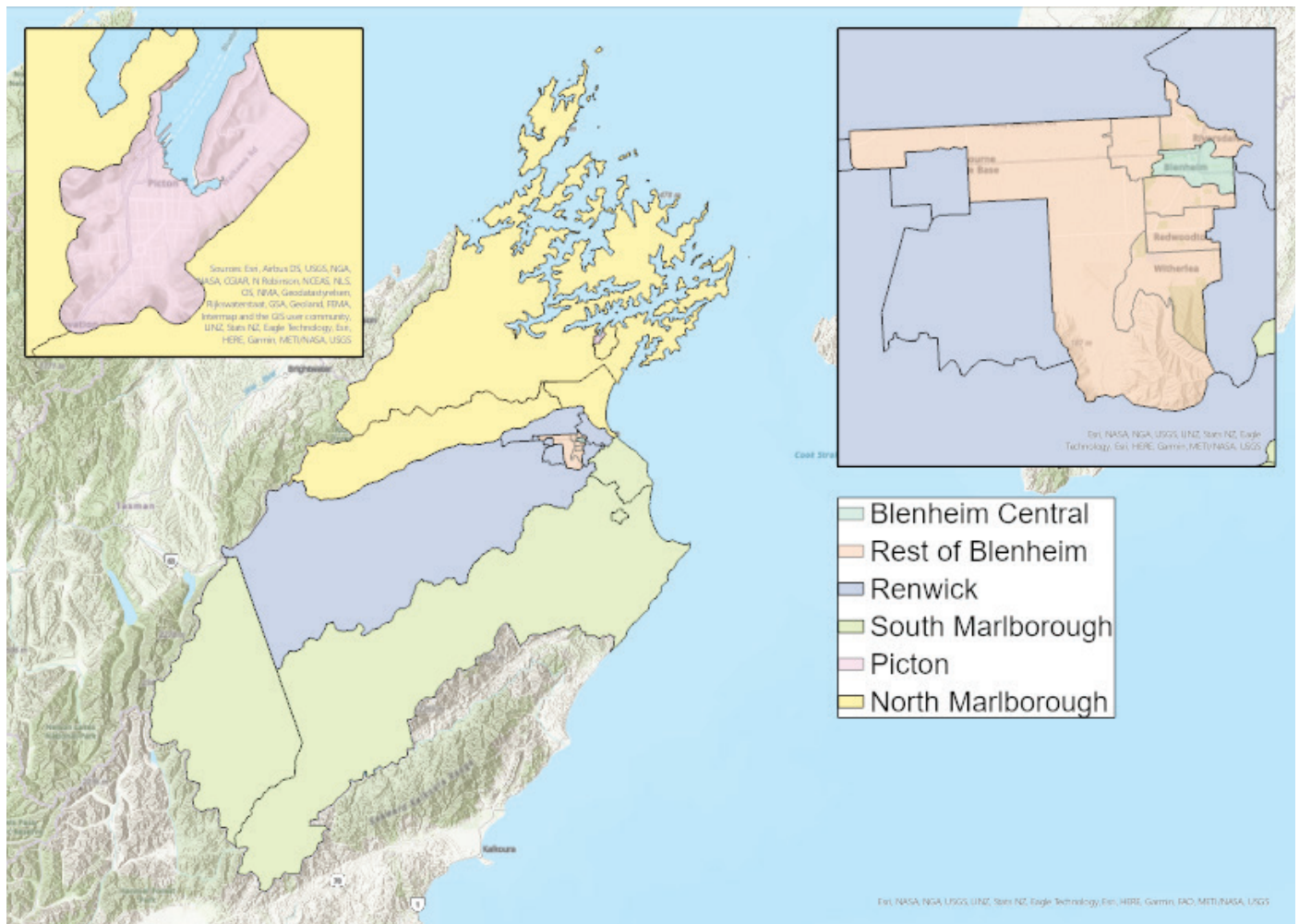


## B – Job Seeker Numbers

Source – MSD COVID-19 Reporting

Recipient characteristics	Mar 19	June 19	Sept 19	Dec 19	Mar 20	June 20	Sept 20	Dec 20	Mar 21
Benefit Sub Group									
Jobseeker - work ready	447	498	543	492	537	852	909	792	684
Jobseeker – Health Condition or Disability	417	441	444	456	468	525	582	627	648
Gender									
Male	441	474	516	480	534	735	801	744	690
Female	423	462	471	468	468	639	687	672	639
Gender Diverse	0	0	0	0	3	3	0	3	3
Ethnic Group									
NZ European	495	546	555	543	570	780	813	807	735
Māori	261	279	309	291	297	390	477	417	420
Pacific Peoples	18	18	24	15	21	36	36	33	30
All other ethnicities	57	63	66	63	72	102	105	105	87
Unspecified	33	33	30	39	45	69	66	57	57
Age Group									
18 – 24 years	156	174	177	174	183	321	315	261	216
25 – 39 years	231	228	264	255	270	381	426	402	387
40 – 54 years	276	306	315	300	330	393	429	414	399
55 – 64 years	201	231	231	219	219	285	321	342	330
Continuous Duration									
One year or less	393	426	546	408	456	762	819	714	573
More than one year	474	513	531	540	546	615	672	705	759
Incapacity Group Jobseeker									
1. Psychological or psychiatric conditions	207	219	231	228	225	246	291	306	318
2. Musculo-skeletal system disorders	84	90	78	81	78	87	90	90	90
3. Accidents	24	27	24	30	36	45	42	28	51
4. Cardio-vascular disorders	18	21	18	12	15	18	18	21	21
5. Pregnancy-related conditions	0	3	3	6	6	3	3	6	3
6. Other disorders and conditions	81	81	87	99	108	126	138	159	162
Total Jobseeker Support	864	936	987	945	1,002	1,377	1,494	1,419	1,332

## C - Marketview Sub Regions



*“ Done a good job with support local business promotion.  
Keep up the motto of Shop Local,,*

TEAM Survey response

## D -Glossary

Abbreviation	Definition
AI	Artificial intelligence
BAU	Business as usual
BBA	Blenheim Business Association
CBD	Central business district
EDNZ	Economic Development New Zealand
EY	Ernst & Young
GDF	Graeme Dingle Foundation
GDP	Gross domestic product
GM	General manager
GOVT	Government
iRSLG	Interim Regional Skills Leadership Group
MBC	Marlborough Boys College
MBIE	Ministry of Business Innovation & Enterprise
MCOC	Marlborough Chamber of Commerce
MDC	Marlborough District Council
MGC	Marlborough Girls College
MPI	Ministry for Primary Industries
MSD	Ministry for Social Development
NZ	New Zealand
NZTE	New Zealand Trade and Enterprise
OE	Overseas experience
QCC	Queen Charlotte College
RTO	Regional Tourism Organisation
SIL	SIL Research
TEAM	The Economic Action Marlborough Group
UK	United Kingdom
US	United States





## E– Data Sources

### Industry Data

- [www.Aqua.org.nz/exports](http://www.Aqua.org.nz/exports)
- [www.nzwine.com/en/media/statistics/](http://www.nzwine.com/en/media/statistics/)
- [www.seafoodnewzealand.org.nz/publications/export-information/](http://www.seafoodnewzealand.org.nz/publications/export-information/)
- <https://catalogue.data.govt.nz/dataset/annual-forestry-export-statistics>
- [www.fonterra.com/nz/en/investors/farmgate-milk-prices.html](http://www.fonterra.com/nz/en/investors/farmgate-milk-prices.html)
- [www.rnz.co.nz/news/business/442547/construction-costs-surge-to-annual-3-point-3-percent-growth-rate](http://www.rnz.co.nz/news/business/442547/construction-costs-surge-to-annual-3-point-3-percent-growth-rate)

### Employment

- [www.msd.govt.nz/about-msd-and-our-work/publications-resources/statistics/covid-19/](http://www.msd.govt.nz/about-msd-and-our-work/publications-resources/statistics/covid-19/)
- [www.mbie.govt.nz/business-and-employment/employment-and-skills/regional-skills-leadership-groups/marlborough/](http://www.mbie.govt.nz/business-and-employment/employment-and-skills/regional-skills-leadership-groups/marlborough/)

### Consumer Spend Data

- TEAM are unable to share the source Marketview data as this is a paid service with password entry.

### SIL Industry Survey

- [www.marlborough.govt.nz/repository/libraries/id:1w1mps0ir17q9sgxanf9/hierarchy/Documents/CDEM/TEAM/TEAM\\_Reports\\_List/Phase\\_2\\_List/2021\\_MDC\\_TEAM\\_Economic\\_Impact\\_Survey\\_Report\\_Final.pdf](http://www.marlborough.govt.nz/repository/libraries/id:1w1mps0ir17q9sgxanf9/hierarchy/Documents/CDEM/TEAM/TEAM_Reports_List/Phase_2_List/2021_MDC_TEAM_Economic_Impact_Survey_Report_Final.pdf)

### Infometrics

#### COVID-19 Report May 2020

- [www.marlborough.govt.nz/repository/libraries/id:1w1mps0ir17q9sgxanf9/hierarchy/Documents/CDEM/TEAM/TEAM\\_Reports\\_List/Phase\\_1\\_List/Economic\\_Impacts\\_of\\_the\\_COVID-19\\_Pandemic\\_on\\_the\\_Marlborough\\_District\\_-\\_Early\\_Estimates.pdf](http://www.marlborough.govt.nz/repository/libraries/id:1w1mps0ir17q9sgxanf9/hierarchy/Documents/CDEM/TEAM/TEAM_Reports_List/Phase_1_List/Economic_Impacts_of_the_COVID-19_Pandemic_on_the_Marlborough_District_-_Early_Estimates.pdf)

#### COVID-19 Report November 2020

- [www.marlborough.govt.nz/repository/libraries/id:1w1mps0ir17q9sgxanf9/hierarchy/Documents/CDEM/TEAM/TEAM\\_Reports\\_List/Phase\\_2\\_List/Economic\\_Impacts\\_of\\_the\\_COVID-19\\_Pandemic\\_on\\_the\\_Marlborough\\_District\\_-\\_Revised\\_Estimates.pdf](http://www.marlborough.govt.nz/repository/libraries/id:1w1mps0ir17q9sgxanf9/hierarchy/Documents/CDEM/TEAM/TEAM_Reports_List/Phase_2_List/Economic_Impacts_of_the_COVID-19_Pandemic_on_the_Marlborough_District_-_Revised_Estimates.pdf)

### Regional Economic Profiles

- [www.marlborough.govt.nz/about-marlborough/infometrics-economic-and-community-data](http://www.marlborough.govt.nz/about-marlborough/infometrics-economic-and-community-data)

### Industry Conversations

- TEAM held multiple conversations with industry experts throughout the Programme.

*“...thank you so much to the chamber and council for enabling the webinars. All of them were informative and had lots of information and tools I applied to our business, my leadership and me personally”*

## F – TEAM Documents

All documentation about TEAM can be held on the Marlborough District Council website under TEAM. These documents include:

- Phase One report
- Phase Two interim report
- SIL report
- Infometrics data
- Governance group Terms of Reference
- Media releases

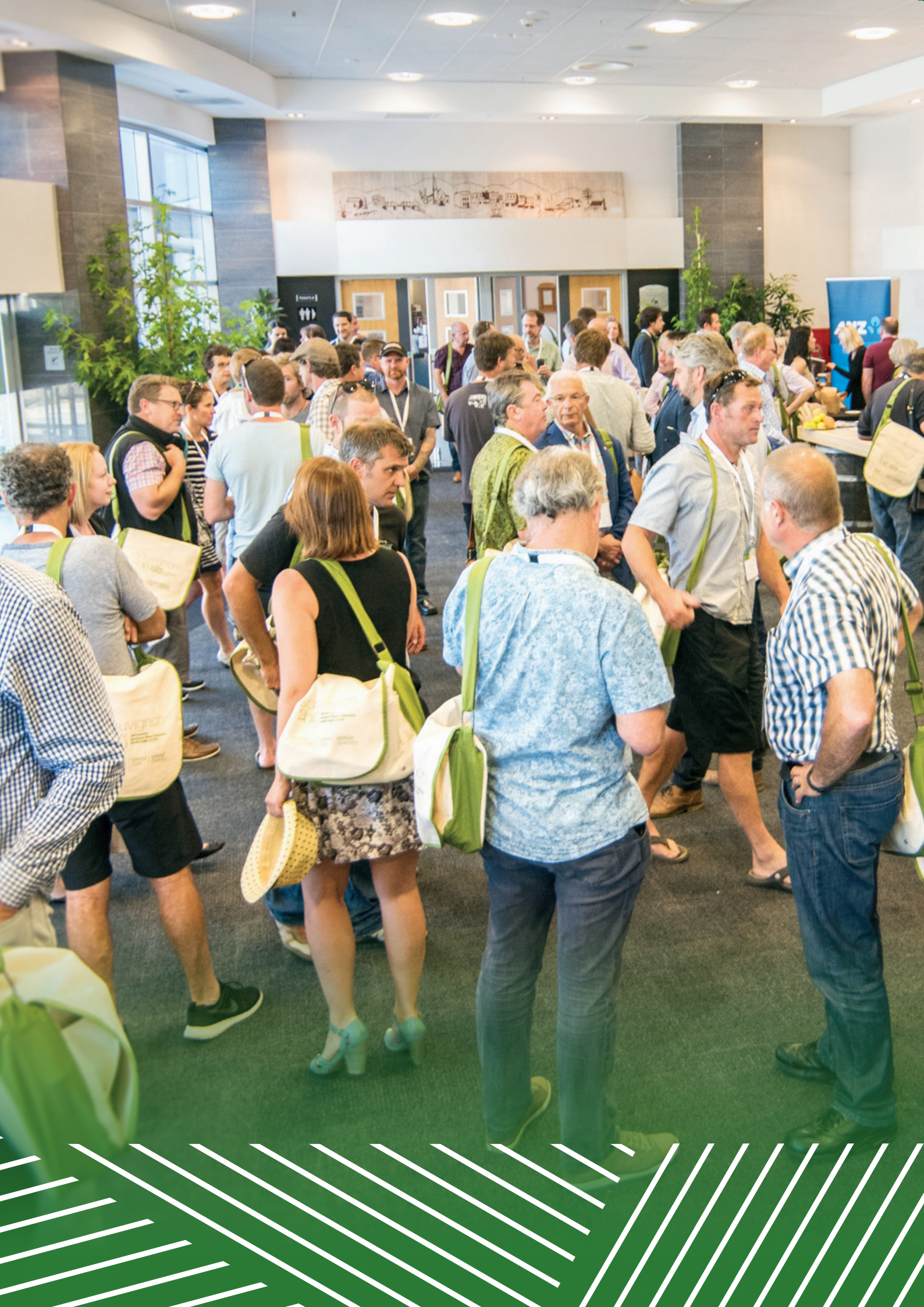
[www.marlborough.govt.nz/civil-defence-emergency-management/COVID-19-novel-coronavirus/the-economic-action-marlborough-team-group](http://www.marlborough.govt.nz/civil-defence-emergency-management/COVID-19-novel-coronavirus/the-economic-action-marlborough-team-group)

## G – Information Sources for Businesses and Employees

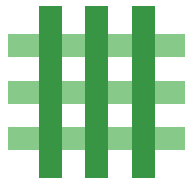
The following table includes information on where support can be found:

Source	Information available
Connected.govt.nz	Connected all of government site for Employment, Education and Training support for workers and businesses
Businesstrustmarlborough.co.nz	Business Trust Marlborough – works to empower new and existing businesses in Marlborough through mentoring, networking and events.
Mcoc.org.nz	Marlborough Chamber of Commerce – Provides a range of programmes and initiatives to support business
Marlboroughnz.com	Destination Marlborough – Responsible for marketing Marlborough as a visitor destination.
Business.govt.nz/covid-19/	The government's central resource for COVID-19 business information with updates about COVID-19 and guidance to help businesses.









**TEAM**  
Economic Action  
Marlborough  
**Mahi Tahi**

