



# Manawatū Region

# Quarterly Retail Report

# December 2021

**PALMY**  
PAPAIDEA  
PALMERSTON  
NORTH  
CITY

 **MANAWATU**  
DISTRICT COUNCIL

**CEDA**  
CENTRAL ECONOMIC  
DEVELOPMENT AGENCY



# Retail Spending Overview for the Manawatū Region

## Overview

The retail sector in the Manawatū region recovered quickly from the COVID-19 Level-3 and 4 restrictions in place for three weeks in the September quarter.

Electronic card retail spending increased by 7.9% in the December quarter compared with the December 2020 quarter. Retail spending in New Zealand declined by 0.4%. Level-3 COVID restrictions in the upper North Island during October and November contributed to the decline in retail spending in New Zealand.

Annual retail spending in the region was nearly \$1.6 billion in the year ended December 2021, increasing by 9.7% from 2020, while there was an increase of 5.0% for New Zealand.

*The Manawatū Region Quarterly Retail Report is produced by Palmerston North City Council and CEDA using data sourced from MarketView.*

## December 2021 quarter

December quarter retail spending in the region was \$465 million, increasing by 7.9% from the December 2020 quarter.

Retail spending in New Zealand was \$18,337 million, declining by 0.4%.

Spending in Manawatū District increased by 11.0% in the quarter while spending in Palmerston North increased by 7.4%.

The highest daily spend in the region was \$9.2 million on Thursday 23 December.



## **Year ended December 2021**

Annual spending in the region in the year to December 2021 was \$1,596 million, increasing by 7.4% from the previous year

Retail spending in New Zealand was \$65,643 million, increasing by 5.0%.

Spending in Manawatū District increased by 12.1% in the year ended December 2021 while the growth rate in Palmerston North was 9.2%.

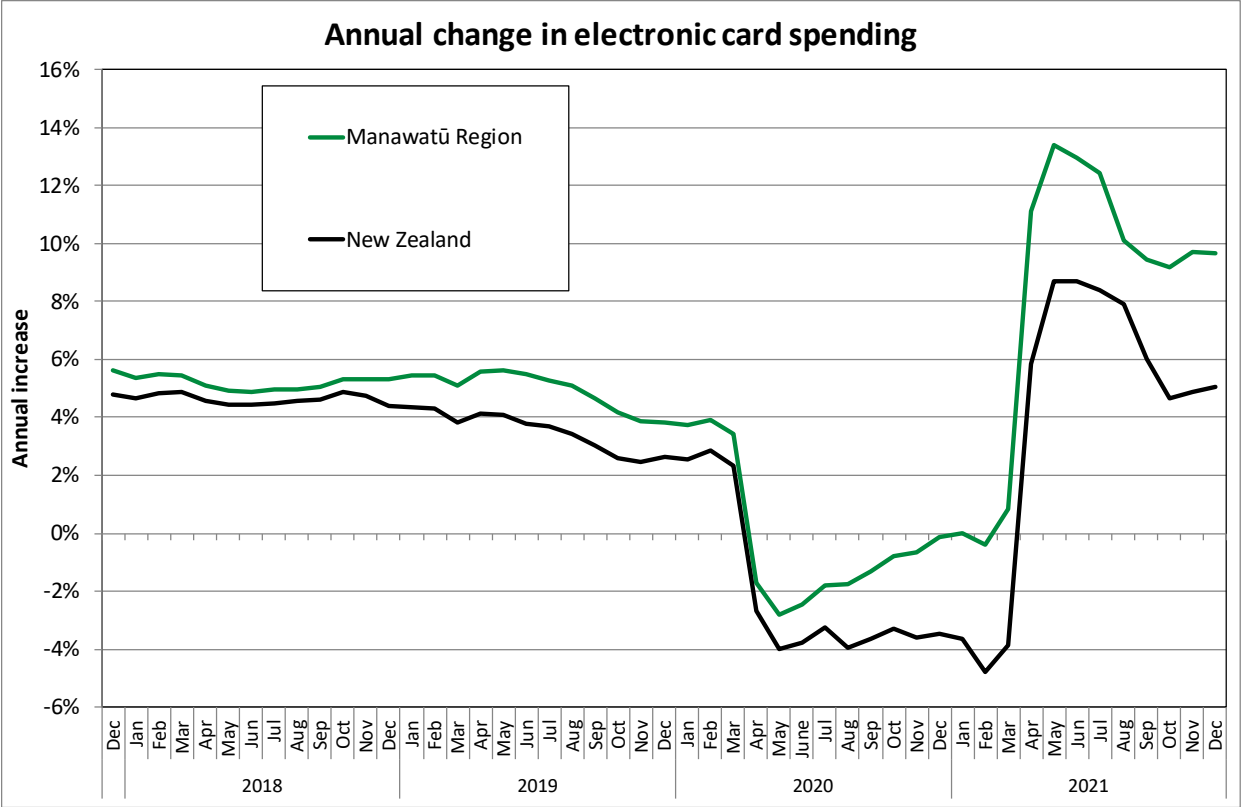
There was a \$121 million net gain in spending at Manawatū retailers in the year ended December 2021, increasing from \$100 million in the year ended December 2020. (There is a net gain when visitor spending in the region exceeds Manawatū resident spending in other regions).

The loyalty rate was 82.7% in the year ended December 2021 compared with 83.4% in the year ended December 2020 (the percentage of spending by Manawatū residents at local retailers).



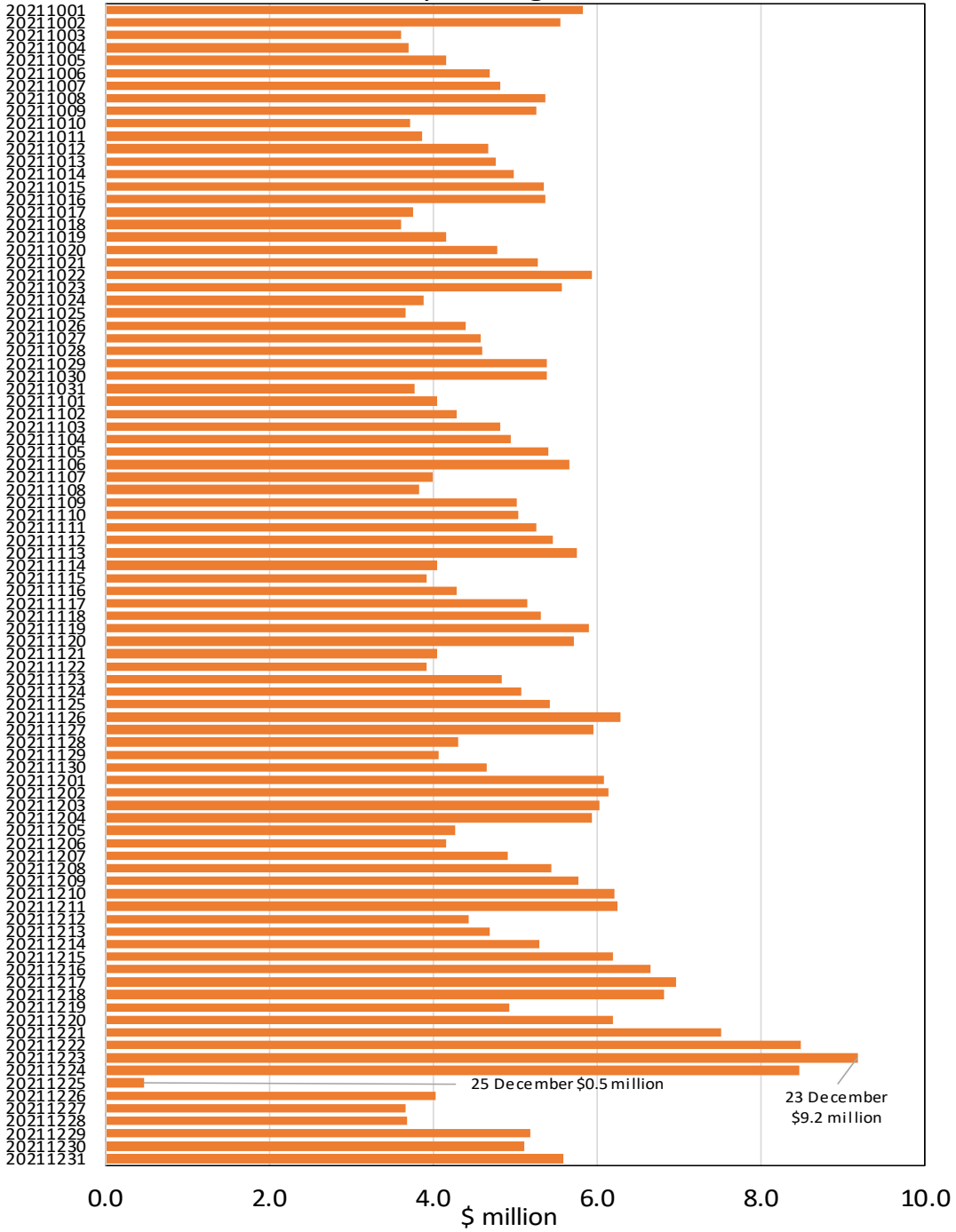
## Retail Overview

Cardholder origin	December 2021 quarter		Year ended December 2021		
	Value of spending (\$m)	Change (from same quarter last year)	Value of spending (\$m)	Change (from last year)	% share of spending
Locals	355.8	8.2%	1,219.7	7.9%	76.4%
Rest of Horizons region	59.4	8.5%	197.9	13.9%	12.4%
Rest of New Zealand	45.1	0.8%	163.6	18.2%	10.2%
International	4.9	74.1%	15.1	21.6%	0.9%
<b>Total spending at Manawatū region merchants</b>	<b>465.3</b>	<b>7.9%</b>	<b>1,596.3</b>	<b>9.7%</b>	<b>100.0%</b>
<b>Total spending in New Zealand</b>	<b>18,336.9</b>	<b>-0.4%</b>	<b>65,643.3</b>	<b>5.0%</b>	

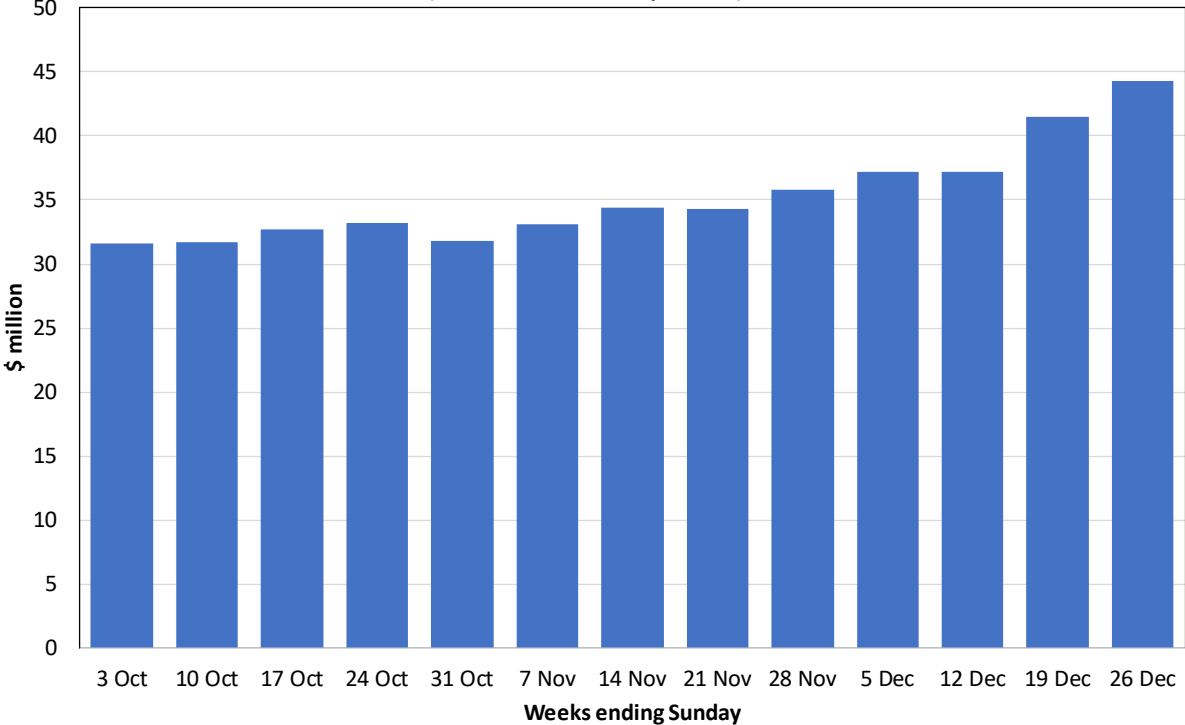


The busiest day for the region is Saturdays, while the busiest week in the December quarter was the week ended Sunday 26 December. The fastest growth category in the quarter was fuel and automotive products. Petrol prices in the quarter increased by 30.5% from the December 2020 quarter. The day with the highest spend was Thursday 23 December, with spending of \$9.2 million – Boxing Day spend was \$4.2 million.

## December quarter Manawatū region daily retail spending



**Value of weekly electronic card retail spending in the Manawatū region**  
(December 2021 quarter)

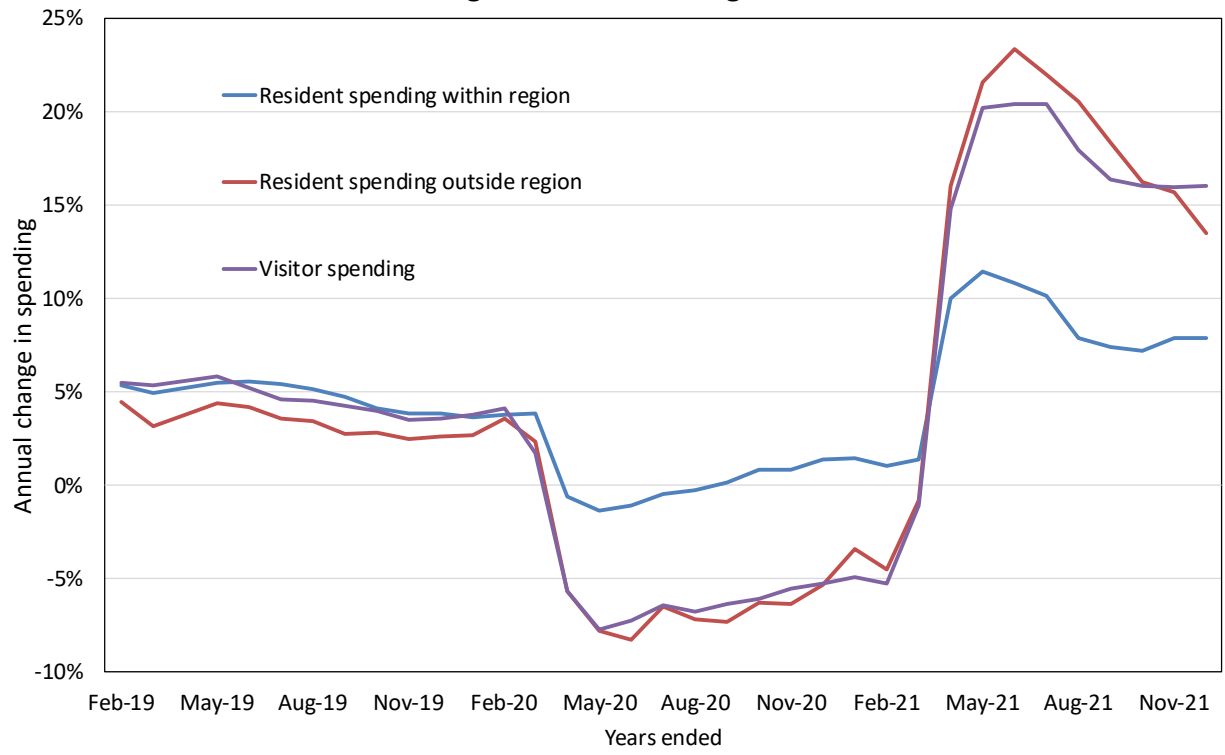




	December 2021 quarter		Year ended December 2021	
Cardholder origin	Value of spending (\$m)	Change (from same quarter last year)	Value of spending (\$m)	Change (from last year)
Resident spending locally	355.8	8.2%	1,219.7	7.9%
Resident spending outside region	67.9	-4.6%	255.3	13.5%
<b>Total resident spending</b>	<b>423.8</b>	<b>6.0%</b>	<b>1,475.0</b>	<b>8.8%</b>
Visitor spending	109.5	6.9%	376.6	16.0%
Net gain in spending for region	41.5	33.4%	121.3	21.7%
<b>Total spending at Manawatū region merchants</b>	<b>465.3</b>	<b>7.9%</b>	<b>1,596.3</b>	<b>9.7%</b>
<b>Manawatū region loyalty rate</b>	<b>84.0%</b>		<b>82.7%</b>	
% share of Manawatū region resident spending at Manawatū retailers				
<b>Visitor share of Manawatū region spending</b>	<b>23.5%</b>		<b>23.6%</b>	



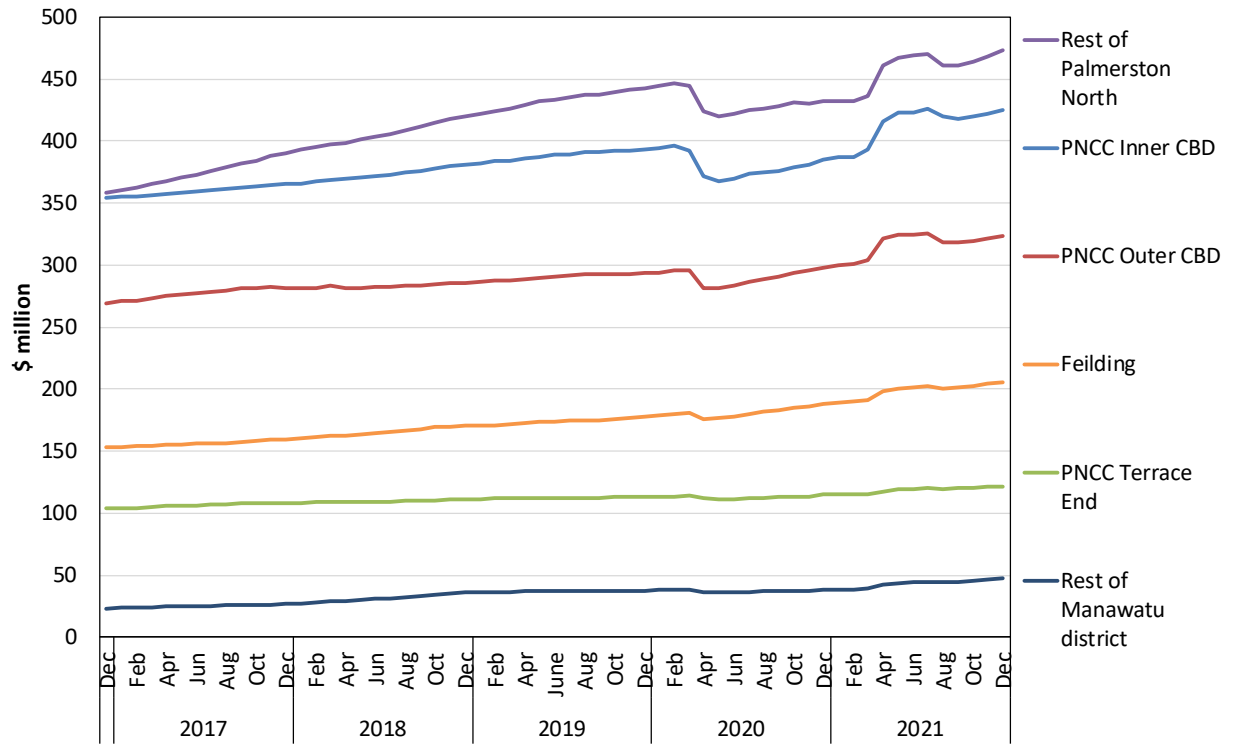
Annual change in Manawatū region retail flows





	December 2021 quarter		Year ended December 2021		
Cardholder origin	Value of spending (\$m)	Change (from same quarter last year)	Value of spending (\$m)	Change (from last year)	Precinct % share
Palmerston North Inner CBD	127.6	6.1%	425.0	10.4%	26.6%
Palmerston North Outer CBD	95.5	6.0%	323.2	8.4%	20.2%
PNCC Terrace End	34.2	5.4%	121.8	6.1%	7.6%
Rest of Palmerston North	135.3	10.2%	473.1	9.6%	29.6%
<b>Total Palmerston North</b>	<b>392.5</b>	<b>7.4%</b>	<b>1,343.2</b>	<b>9.2%</b>	
Feilding	59.2	8.5%	205.9	9.6%	12.9%
Rest of Manawatū District	13.6	23.1%	47.2	24.7%	3.0%
<b>Total Manawatū district</b>	<b>72.8</b>	<b>11.0%</b>	<b>253.1</b>	<b>12.1%</b>	
<b>Total Manawatū region</b>	<b>465.3</b>	<b>7.9%</b>	<b>1,596.3</b>	<b>9.7%</b>	<b>100.0%</b>

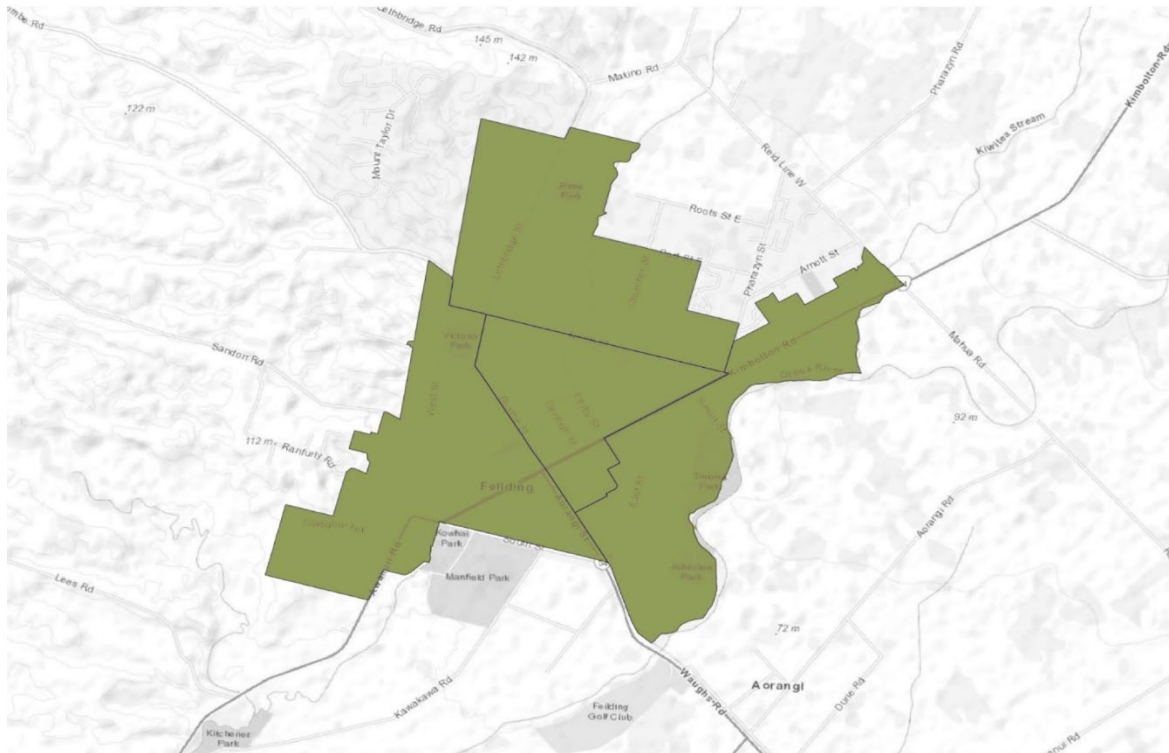
### Annual electronic card retail spending by retail precinct



## Palmerston North Retail Precincts



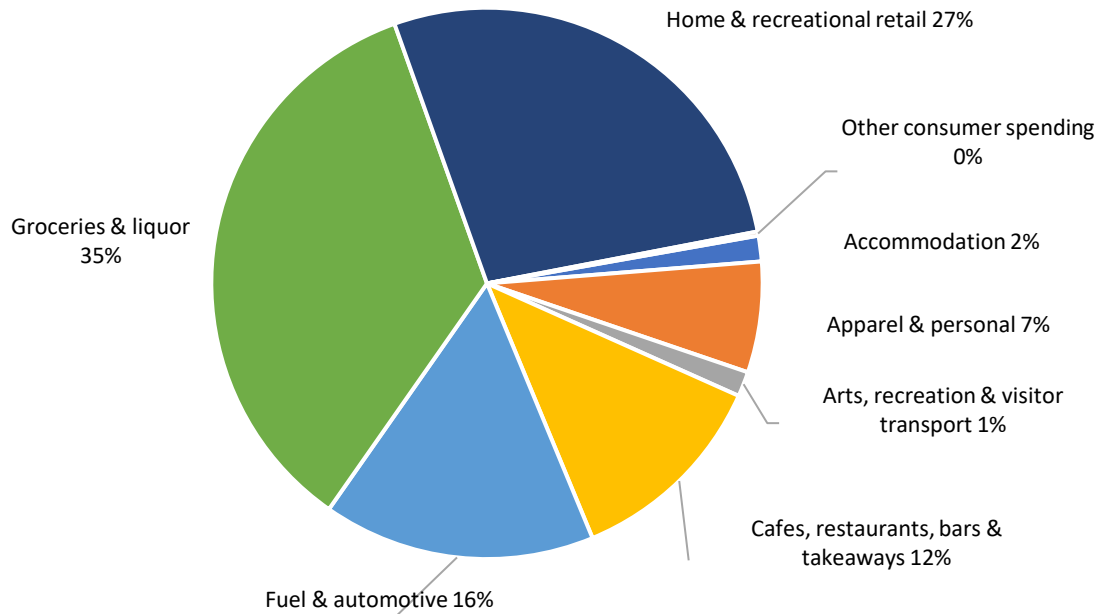
## Manawatū District Retail Precincts





Cardholder origin	Manawatū region		New Zealand		
	Value of spending (\$m)	Change (from last year)	Value of spending (\$m)	Change (from last year)	Manawatū region share of New Zealand
Accommodation	24.0	19.4%	1,308.7	-6.7%	1.8%
Apparel & personal	103.7	13.9%	3,798.8	5.3%	2.7%
Arts, recreation & visitor transport	23.4	1.2%	1,368.8	-13.6%	1.7%
Cafes, restaurants, bars & takeaways	192.5	17.0%	8,839.9	7.1%	2.2%
Fuel & automotive	255.0	18.9%	10,128.7	14.0%	2.5%
Groceries & liquor	556.0	4.1%	24,170.9	2.5%	2.3%
Home & recreational retail	437.9	8.8%	15,692.6	5.8%	2.8%
Other consumer spending	3.8	-36.0%	334.9	0.6%	1.1%
<b>Total</b>	<b>1,596.3</b>	<b>9.7%</b>	<b>65,643.3</b>	<b>5.0%</b>	<b>2.4%</b>

## Distribution of Manawatū region spending by sector



## Retail Sector Classification

### Accommodation

### Apparel & personal

Clothing retailing  
Footwear retailing  
Watch & jewellery retailing  
Other personal accessory retailing  
Hairdressing & beauty services

### Arts, recreation & visitor transport

Interurban & rural bus transport  
Urban bus transport (including tramway)  
Taxi & other road transport  
Rail passenger transport

### Water passenger transport

Air & space transport  
Scenic & sightseeing transport  
Passenger car rental & hiring  
Other motor vehicle & transport equipment rental & hire  
Travel agency & tour arrangement services  
Museum operation  
Zoological & botanical gardens operation  
Nature reserves & conservation parks operation  
Performing arts operation  
Creative artists, musicians, writers & performers  
Performing arts venue operation

Health & fitness centres & gymnasia operation  
Sport & physical recreation clubs & sports professionals  
Sports & physical recreation venues, grounds & facilities  
Sport & physical recreation admin. & track operation  
Horse & dog racing administration & track operation  
Other horse & dog racing activities  
Amusement parks & centres operation  
Amusement & other recreation activities n.e.c  
Casino operation  
Lottery operation  
Other gambling activities

**Cafes, restaurants, bars & takeaways**

Cafes & restaurants  
Takeaway food services  
Catering services  
Pubs, taverns & bars  
Clubs (hospitality)  
Clubs (Hospitality)

**Fuel & automotive**

Motor vehicle parts retailing  
Tyre retailing  
Fuel retailing  
Other automotive repair & maintenance

**Groceries & liquor**

Supermarket & grocery stores  
Fresh meat, fish & poultry retailing

Fruit & vegetable retailing  
Liquor retailing  
Other specialised food retailing

**Home & recreational retail**

Sport & camping equipment  
Entertainment media retailing  
Toy & game retailing  
Newspaper & book retailing  
Marine equipment retailing  
Department stores  
Pharmaceutical, cosmetic & toiletry goods  
Stationery goods retailing  
Antique & used goods retailing  
Flower retailing  
Other store-based retailing n.e.c.  
Furniture retailing  
Floor coverings retailing  
Houseware retailing  
Manchester & other textile goods retailing  
Electrical, electronic & gas appliance retailing  
Computer & computer peripheral retailing  
Other electrical & electronic goods retailing  
Hardware & building supplies retailing  
Garden supplies retailing

**Other consumer spending**

Car retailing  
Motor cycle retailing  
Trailer & other motor vehicle retailing  
Retail commission based buying & selling



## Customer Origin

Cardholder origin	December 2021 quarter		Year ended December 2021		
	Value of spending (\$m)	Change (from last year)	Value of spending (\$m)	Change (from last year)	% share of spending
Locals	355.8	8.2%	1,219.7	7.9%	76.4%
Rangitikei District	15.0	11.1%	50.0	13.8%	3.1%
Ruapehu District	1.4	0.2%	4.7	4.7%	0.3%
Whanganui District	7.4	15.7%	24.1	22.5%	1.5%
Rest of Manawatū-Whanganui region	35.6	6.4%	119.1	12.8%	7.5%
Auckland Region	6.2	-18.1%	25.8	13.8%	1.6%
Wellington Region	15.4	7.1%	52.5	18.3%	3.3%
Rest of New Zealand	23.5	3.0%	85.3	19.5%	5.3%
International	4.9	74.1%	15.1	21.6%	0.9%
<b>Total</b>	<b>465.3</b>	<b>7.9%</b>	<b>1,596.3</b>	<b>9.7%</b>	<b>100.0%</b>



## Annual customer origin for Manawatū retailers

