

Manawatū Region

Quarterly Retail Report

June 2021





Retail Spending Overview for the Manawatū Region

Overview

The rate of growth in spending in the region in the June quarter was slightly below the growth rate for New Zealand. That was expected because in the June 2020 quarter, when a decline of 18.5% was recorded in the region compared with a decline of 21.7% for New Zealand.

Annual retail spending in the region was nearly \$1.6 billion, increasing by 13% from 2020, while there was an increase of 8.7% for New Zealand.

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

June 2021 quarter

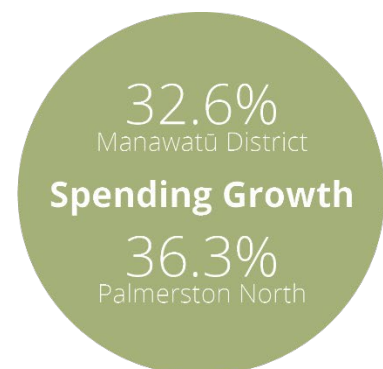
June quarter retail spending in the region was \$395 million, increasing by 35.7% from the June 2020 quarter.

Retail spending in New Zealand was \$16,684 million, increasing by 37.1%.

There was a \$33 million net gain in spending at Manawatū retailers in the June quarter, increasing by 44% from the June quarter.

82.2% loyalty rate (percentage of spending by Manawatū residents at local retailers).

Spending in Manawatū District increased by 32.6% in the quarter while the growth rate in Palmerston North was 36.3%.



Year ended June 2021

Annual spending in the region was \$1,583 million, increasing by 13.1% from the previous year

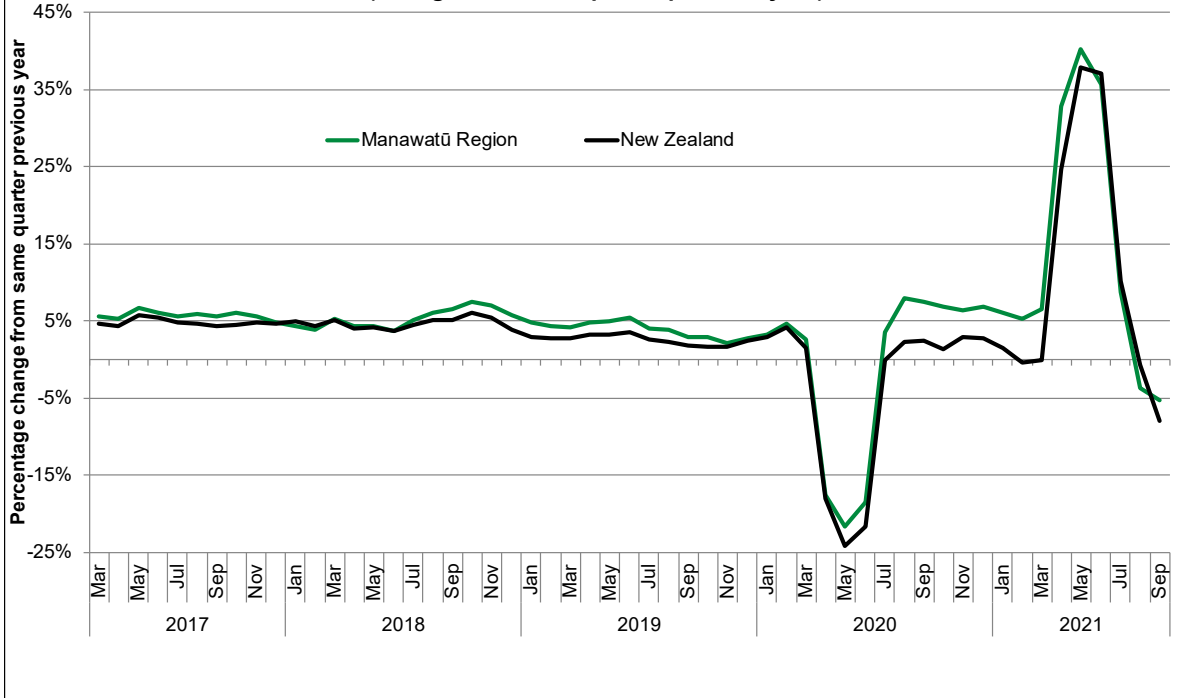
Retail spending in New Zealand was \$67,040 million, increasing by 8.7%.

Spending in Manawatū District increased by 14.9% in the year ended June 2021 while the growth rate in Palmerston North was 12.6%.

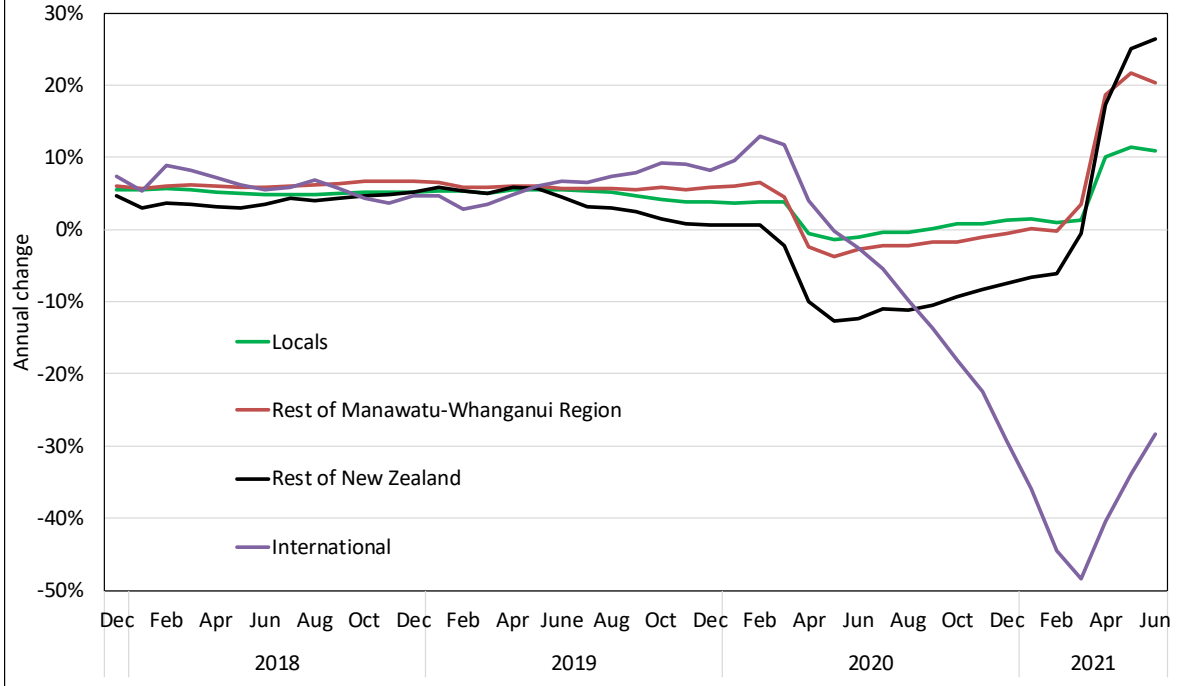


Cardholder origin	June 2021 quarter		Year ended June 2021		
	Value of spending (\$m)	Change (from same quarter last year)	Value of spending (\$m)	Change (from last year)	% share of spending
Locals	297.0	26.9%	1,205.8	10.8%	76.2%
Rest of Horizons region	49.4	52.4%	197.4	20.3%	12.5%
Rest of New Zealand	44.2	95.5%	167.4	26.4%	10.6%
International	4.1	131.4%	11.9	-28.3%	0.8%
Total spending at Manawatū region merchants	394.8	35.7%	1,582.5	13.0%	100.0%
Total spending in New Zealand	16,684.2	37.1%	67,039.6	8.7%	

Quarterly change in electronic card retail spending (change from same quarter previous year)

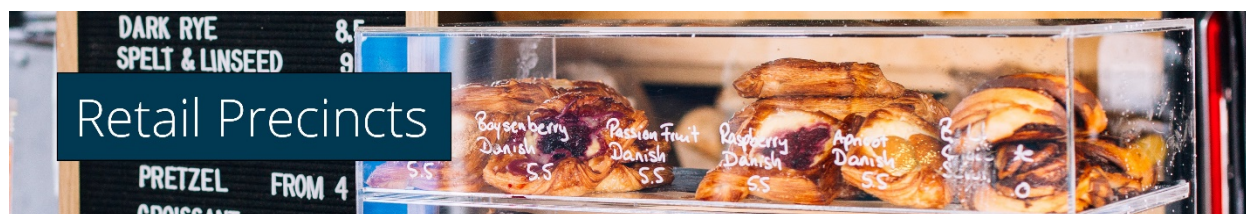


Annual change in Manawātū region electronic card retail spending (origin of spending at Manawātū merchants)





Cardholder origin	June 2021 quarter		Year ended June 2021	
	Value of spending (\$m)	Change (from same quarter last year)	Value of spending (\$m)	Change (from last year)
Resident spending locally	297.0	26.9%	1,205.8	10.8%
Resident spending outside region	64.5	90.6%	266.7	23.5%
Total resident spending	361.5	35.0%	1,472.5	12.9%
Visitor spending	97.4	71.9%	375.7	20.6%
Net gain in spending for region	32.9	44.1%	109.0	13.9%
Total spending at Manawatū region merchants	394.8	35.7%	1,582.5	13.0%
Manawatū region loyalty rate	82.2%		81.9%	
% share of Manawatū region resident spending at Manawatū retailers				
Visitor share of Manawatū region spending	16.3%		16.9%	



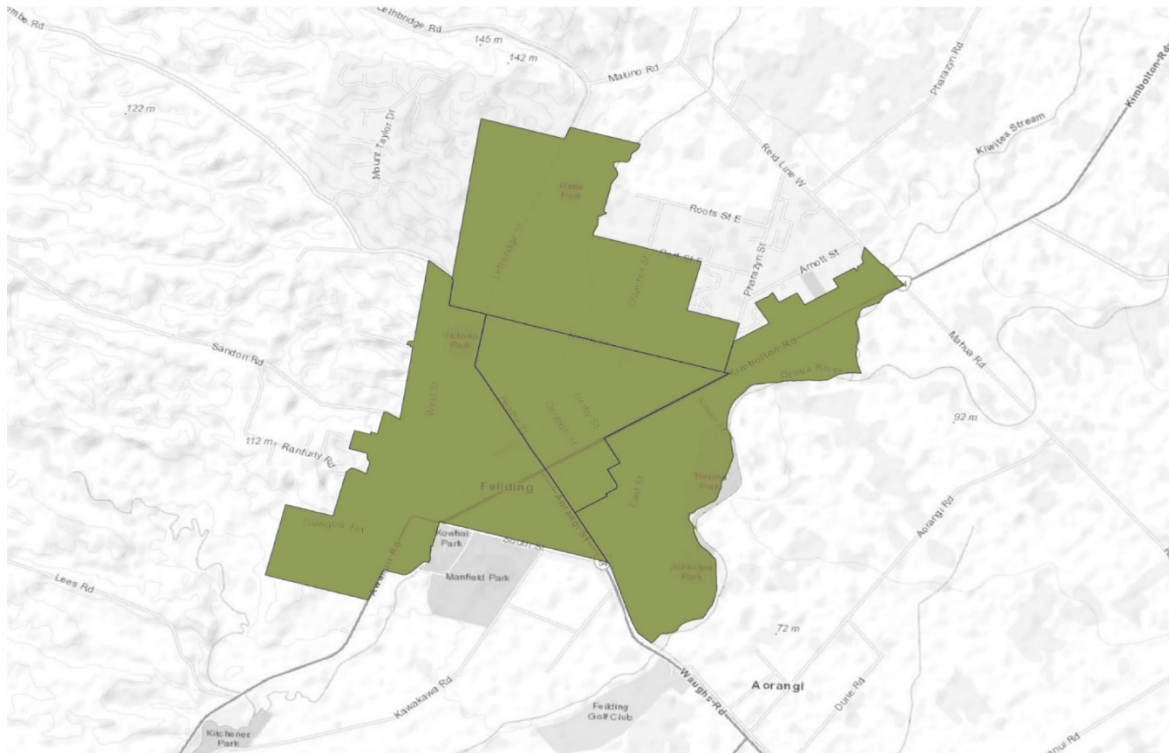
Retail Precincts

Cardholder origin	June 2021 quarter		Year ended June 2021		
	Value of spending (\$m)	Change (from same quarter last year)	Value of spending (\$m)	Change (from last year)	Precinct % share
Palmerston North Inner CBD	105.0	40.5%	422.8	14.5%	26.7%
Palmerston North Outer CBD	80.4	36.0%	324.8	14.6%	20.5%
PNCC Terrace End	29.6	18.9%	119.6	7.1%	7.6%
Rest of Palmerston North	117.7	37.9%	469.3	11.1%	29.7%
Total Palmerston North	332.7	36.3%	1,336.5	12.6%	
Feilding	50.2	27.0%	201.6	13.3%	12.7%
Rest of Manawatū District	11.9	62.9%	44.3	22.5%	2.8%
Total Manawatū district	62.0	32.6%	246.0	14.9%	
Total Manawatū region	394.7	35.7%	1,582.4	12.9%	100.0%

Palmerston North Retail Precincts



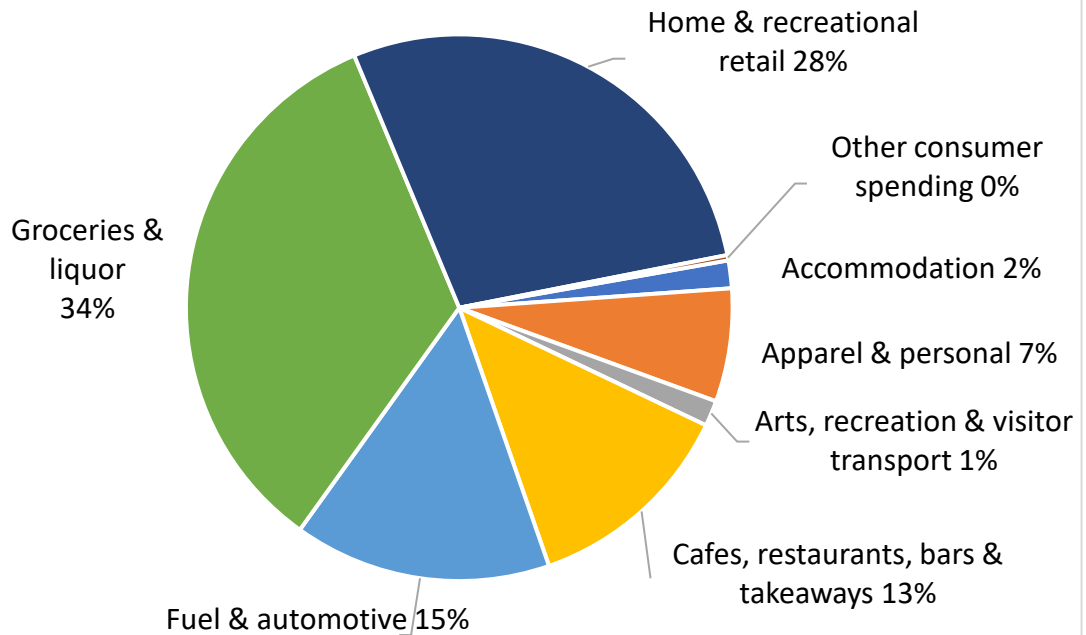
Manawatū District Retail Precincts





Cardholder origin	Manawatū region		New Zealand		Manawatū region share of New Zealand
	Value of spending (\$m)	Change (from last year)	Value of spending (\$m)	Change (from last year)	
Accommodation	26.0	19.3%	1,487.7	-7.7%	1.7%
Apparel & personal	106.0	21.5%	4,178.7	18.5%	2.5%
Arts, recreation & visitor transport	24.0	-20.9%	1,569.4	-24.2%	1.5%
Cafes, restaurants, bars & takeaways	199.3	25.6%	9,781.8	18.9%	2.0%
Fuel & automotive	241.1	12.7%	9,875.5	7.6%	2.4%
Groceries & liquor	535.0	4.7%	23,367.3	3.3%	2.3%
Home & recreational retail	446.1	19.7%	16,409.1	16.1%	2.7%
Other consumer spending	5.0	-7.8%	370.1	18.2%	1.3%
Total	1,582.4	12.9%	67,039.6	8.7%	2.4%

Distribution of 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 & gymnasias 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	June 2021 quarter		Year ended June 2021		
	Value of spending (\$m)	Change (from last year)	Value of spending (\$m)	Change (from last year)	% share of spending
Locals	297.0	26.9%	1,205.8	10.8%	76.2%
Rangitikei District	12.3	49.0%	49.5	16.3%	3.1%
Ruapehu District	1.2	49.3%	5.0	21.4%	0.3%
Whanganui District	6.3	84.3%	23.7	30.6%	1.5%
Rest of Manawatū-Whanganui region	29.6	48.5%	119.2	20.1%	7.5%
Auckland Region	7.5	106.0%	27.5	17.8%	1.7%
Wellington Region	13.4	78.9%	52.6	24.8%	3.3%
Rest of New Zealand	23.3	103.0%	87.4	30.4%	5.5%
International	4.1	131.4%	11.9	-28.3%	0.8%
Total	394.8	35.7%	1,582.5	13.0%	100.0%

Customer origin for Manawatū retailers

