

TRUMPS

Manawatū Region

Quarterly Retail Report

March 2022



Hours
Mon - Fri 9:30am - 6pm
Sat 10:00am - 2pm

PALMY
PAPAIOEA
PALMERSTON
NORTH
CITY

**MANAWATU**
DISTRICT COUNCIL

CEDA
CENTRAL ECONOMIC
DEVELOPMENT AGENCY



Retail Spending Overview for the Manawatū Region

Overview

For the quarter ending March 2022, total electronic card spending grew 5.5% in the Manawatū region compared to 3.9% across New Zealand.

The loyalty rate (i.e. percentage of share of Manawatū region resident spending at Manawatū retailers) remained high at 83.3% in the year ending March 2022 compared to 81.4% the year before.

Overall, visitors spending was \$376 million for year ending March 2022, up 12.1% from the previous year.

There was a \$128 million net gain in spending (i.e. visitor spending in the region exceeds local residents spending in other regions) for year ending March 2022, representing a 27.3 % increase over the same period last year.

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

March 2022 quarter

March quarter retail spending was \$396 million, increasing by 5.5% from the March 2021 quarter. (4.7% increase in Palmerston North City, and 9.5% increase in Manawatū District)

Visitor spending in the region was \$89.4 million in the quarter of March 2022 which accounted for 22.6% of spending. Visitor spending was down 6% from the same period last year.

The highest daily spend in the city center was \$ 6.0 million on Friday 11 March.



Year ended March 2022

Annual electronic retail spending in the region was \$1.6 million, increased by 9.4% from previous year. Breakdown as follows:

- Palmerston North City - \$1,359 million, increased by 8.9%,
- Manawatū District - \$259 million, increased by 12.2%.

These compares to \$66,301 million, increased by 6.1% across New Zealand.

Key retail sectors

The largest sectors for spending in region in the year ending March 2022 were:

- Groceries and liquor - \$570 million
- Home & recreational retail - \$438 million
- Fuel and automotive - \$268 million. *This sector has the highest annual increase (23%) compared to year before.*
- Care, restaurants, bars & takeaways - \$189 million

See Retail Sectors on page 12 for more information.

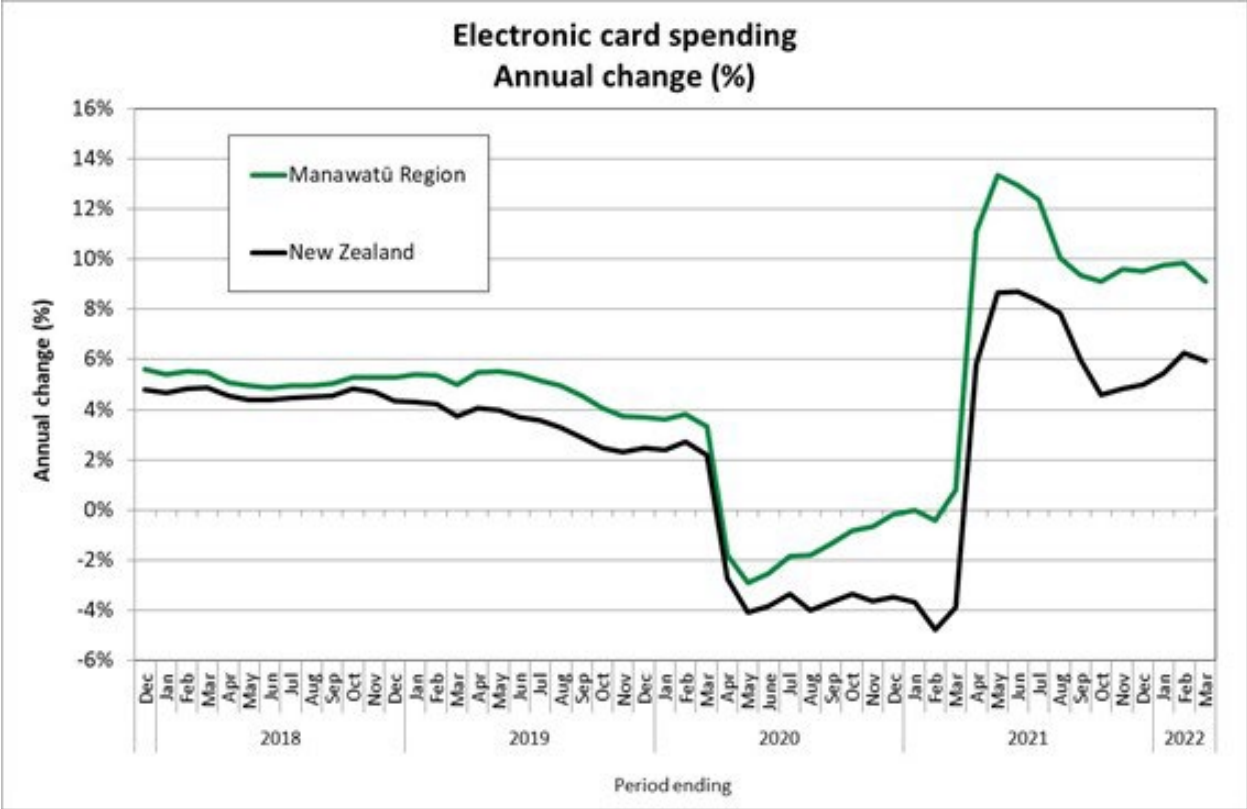
Visitor spending accounted for 23.2% total electronic retail spending.



Retail Overview

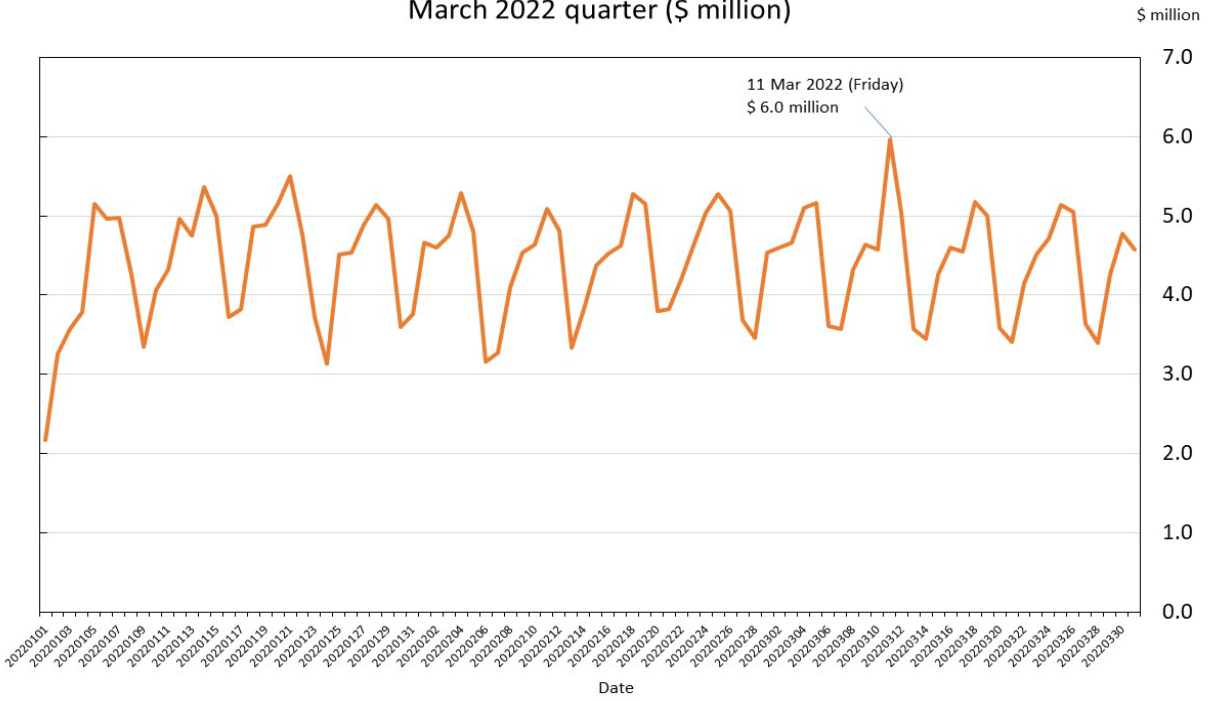
	March 2022 quarter	
Cardholder origin	Value of spending (\$m)	Change (from same quarter last year)
Locals	307.0	7.5%
Rest of Horizons region	45.7	-1.5%
Rest of New Zealand	38.0	-7.8%
International	5.7	123.8%
Total spending at Manawatū region merchants	396.4	5.5%
Total spending in New Zealand	16,748.2	3.9%

Year ending March 2022		
Value of spending (\$m)	Change (from last year)	% share of spending
1,241.3	8.6%	76.8%
197.3	9.3%	12.2%
160.4	10.3%	9.9%
18.3	93.3%	1.1%
1,617.3	9.4%	100.0%
66,301.2	6.1%	

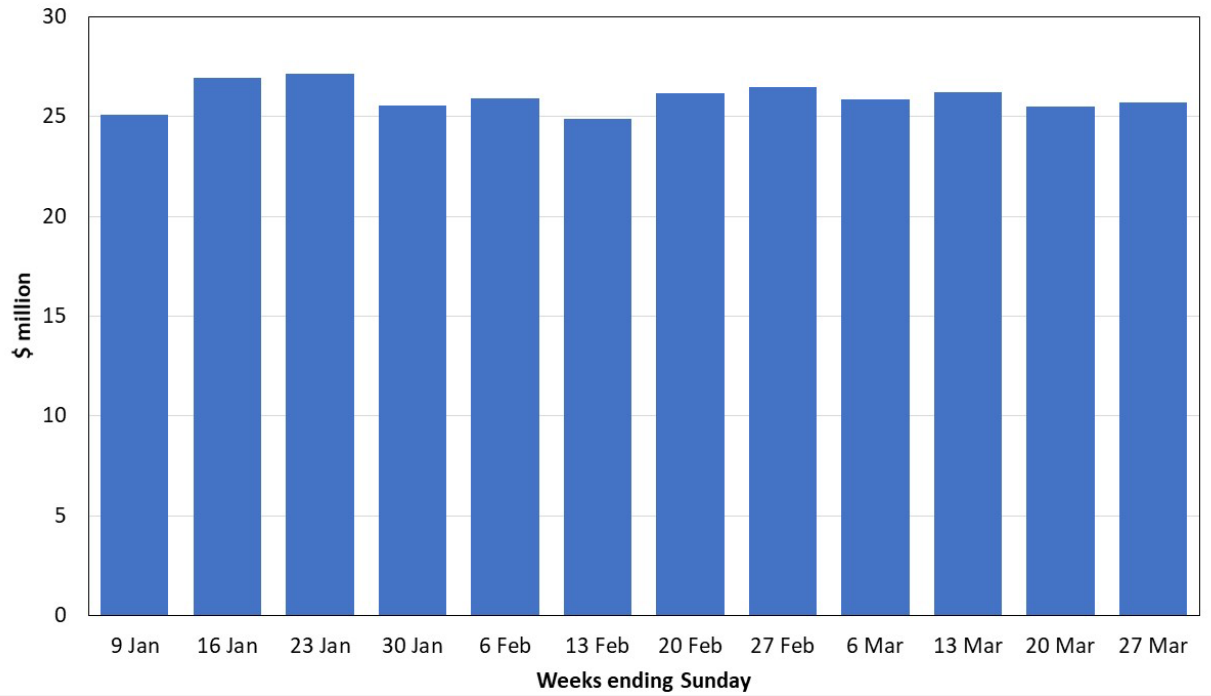


The busiest day for the region is Friday, and the busiest week this quarter was the week ending Sunday 23 January. The fastest growth category in the quarter was fuel and automotive products at 21.2% mainly due to increasing petrol prices. The day with the highest spend was Friday 11 March, with spending of \$6.0 million compared to the lowest of \$2.2 million on New Year’s Day.

Manawatū region: Daily electronic card spending
 March 2022 quarter (\$ million)



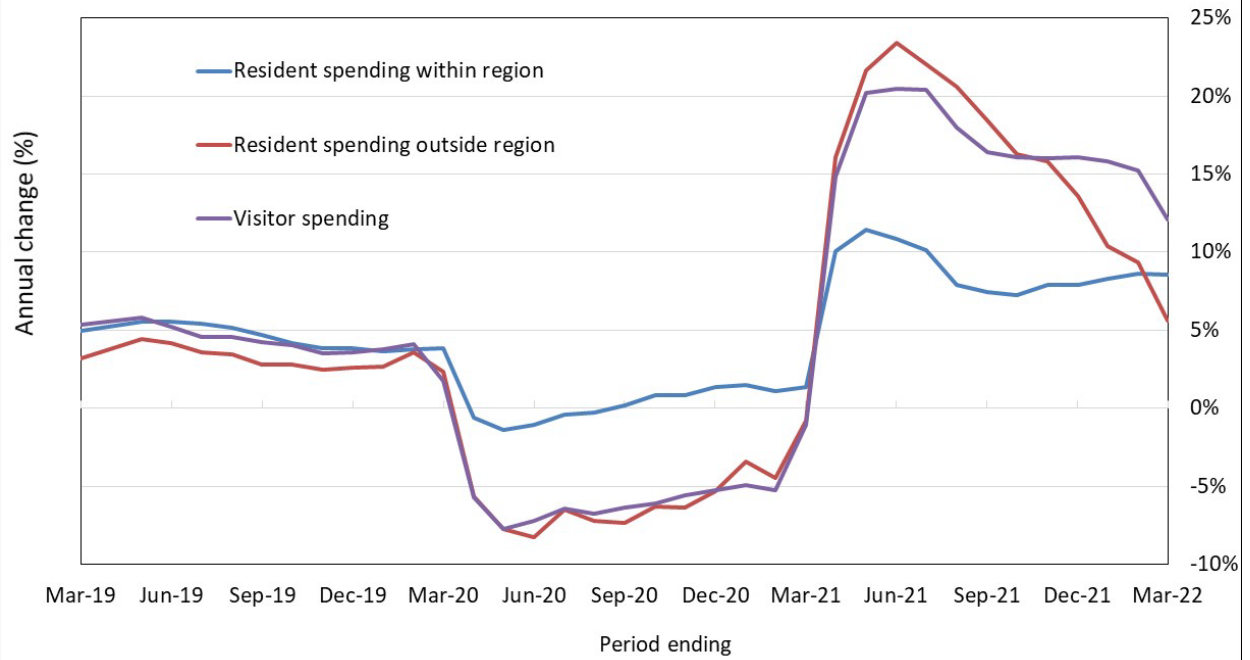
Manawatū region: Weekly electronic card retail spending
 March 2022 quarter (\$ million)





	March 2022 quarter		Year ending March 2022	
Cardholder origin	Value of spending (\$m)	Change (from same quarter last year)	Value of spending (\$m)	Change (from last year)
Resident spending locally	307.0	7.5%	1,241.3	8.6%
Resident spending outside region	66.0	-9.5%	248.5	5.6%
Total resident spending	373.0	4.0%	1,489.9	8.1%
Visitor spending	89.4	-0.9%	376.0	12.1%
Net gain in spending for region	23.5	35.6%	127.5	27.3%
Total spending at Manawatū region merchants	396.4	5.5%	1,617.3	9.4%
Manawatū region loyalty rate	82.3%		83.3%	
% share of Manawatū region resident spending at Manawatū retailers				
Visitor share of Manawatū region spending	22.6%		23.2%	

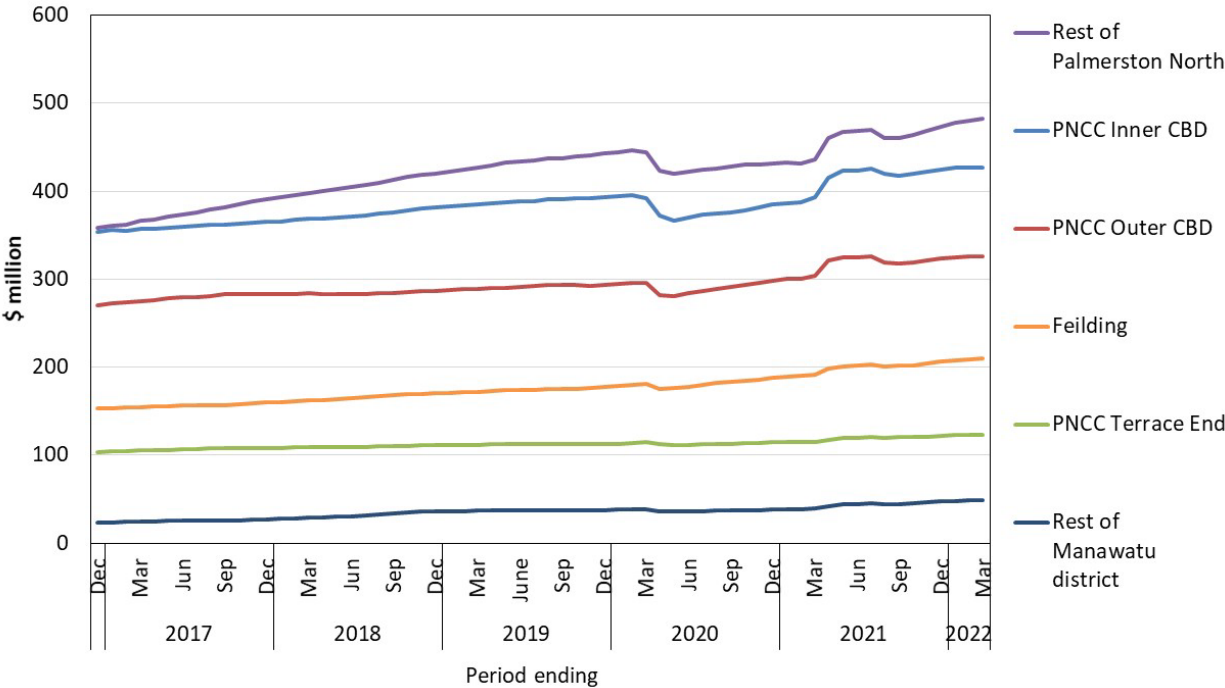
Manawatū region: Retail flows
from electronic card spending
Annual change (%)





Cardholder origin	March 2022 quarter		Year ending March 2022		
	Value of spending (\$m)	Change (from same quarter last year)	Value of spending (\$m)	Change (from last year)	Precinct % share
Palmerston North Inner CBD	99.3	1.9%	426.9	8.7%	26.4%
Palmerston North Outer CBD	79.4	3.5%	326.2	7.3%	20.2%
PNCC Terrace End	29.6	3.2%	122.8	6.9%	7.6%
Rest of Palmerston North	122.0	8.3%	482.6	10.6%	29.8%
Total Palmerston North	330.3	4.7%	1,358.5	8.9%	
Feilding	52.8	8.0%	209.8	9.9%	13.0%
Rest of Manawatū District	13.4	16.1%	49.0	23.4%	3.0%
Total Manawatū district	66.2	9.5%	258.9	12.2%	
Total Manawatū region	396.4	5.5%	1,617.3	9.4%	100.0%

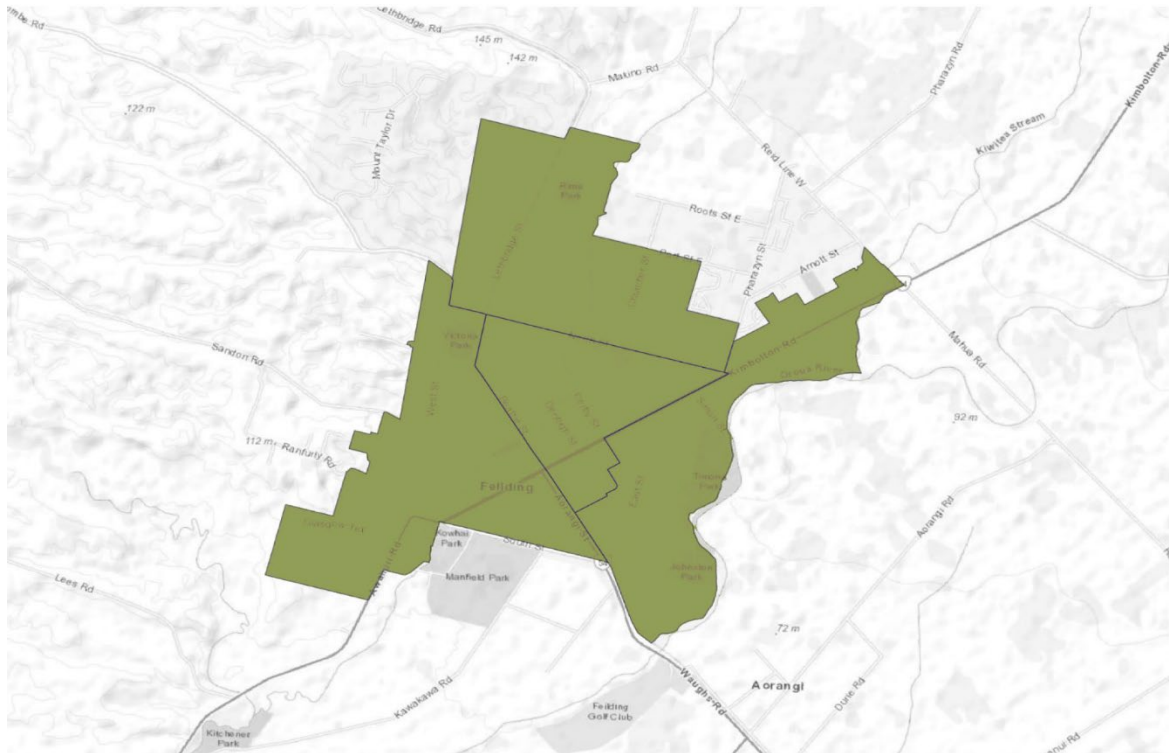
Manawatu region: Retail precincts Annual electronic card spending (\$ million)



Palmerston North Retail Precincts



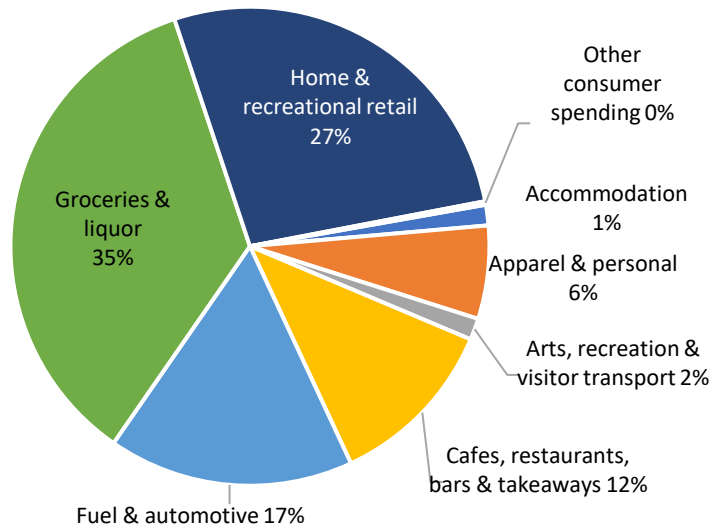
Manawatū District Retail Precincts





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	22.4	8.9%	1,233.4	-2.1%	1.8%
Apparel & personal	101.8	7.4%	3,745.2	1.0%	2.7%
Arts, recreation & visitor transport	23.5	17.4%	1,341.7	0.0%	1.8%
Cafes, restaurants, bars & takeaways	189.4	10.0%	8,600.4	2.0%	2.2%
Fuel & automotive	268.1	22.6%	10,627.0	19.3%	2.5%
Groceries & liquor	570.0	6.9%	24,581.4	5.1%	2.3%
Home & recreational retail	438.2	6.0%	15,838.3	4.9%	2.8%
Other consumer spending	3.8	-32.0%	333.7	-1.6%	1.1%
Total	1,617.3	9.4%	66,301.2	6.1%	2.4%

Manawatū region:
Electronic card spending by retail sector
(Year ending March 2022)





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	March 2022 quarter		Year ending March 2022		
	Value of spending (\$m)	Change (from last year)	Value of spending (\$m)	Change (from last year)	% share of spending
Locals	307.0	7.5%	1,241.3	8.6%	76.8%
Rangitikei District	12.2	2.7%	50.4	11.0%	3.1%
Ruapehu District	1.0	-17.9%	4.5	-3.8%	0.3%
Whanganui District	5.2	-3.7%	23.9	14.6%	1.5%
Rest of Manawatū-Whanganui region*	27.4	-2.2%	118.5	8.1%	7.3%
Auckland Region	6.9	2.2%	26.0	10.2%	1.6%
Wellington Region	12.7	-1.5%	52.4	12.4%	3.2%
Rest of New Zealand	18.4	-14.6%	82.1	9.1%	5.1%
International	5.7	123.8%	18.3	93.3%	1.1%
Total	396.4	5.5%	1,617.3	9.4%	100.0%

*Horowhenua District and Tararua District

Manawatū region: Customer origin
(Year ending March 2022)

