

Manawatū Region

Quarterly Retail Report

September 2021





Retail Spending Overview for the Manawatū Region

Overview

Electronic card retail spending declined by 5.3% in the September quarter compared with the September 2020 quarter. This was due to the impact of COVID-19 Level 3 and 4 restrictions applying in the region between 17 August and 7 September. Retail spending in New Zealand declined by 8.0%, with continuing Level 3 and 4 restrictions in Auckland reducing the overall of retail spending in New Zealand.

Annual retail spending in the region was nearly \$1.6 billion in the year ended September 2021, increasing by 9% from 2020, while there was an increase of 6% for New Zealand.

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

September 2021 quarter

September quarter retail spending in the region was \$360 million, declining by 5.3% from the September 2020 quarter.

Retail spending in New Zealand was \$14,537 million, declining by 8.0%.

There was a \$28 million net gain in spending at Manawatū retailers in the September quarter, declining by 2% from the September 2020 quarter.

84.7% loyalty rate (percentage of spending by Manawatū residents at local retailers).

Spending in Manawatū District declined by 0.1% in the quarter while spending in Palmerston North declined by 6.3%.

84.7%

Loyalty
Rate

\$360m

Manawatū Region
Retail Spending
Sept 2021 quarter

Week ended

**Sunday
25 July**

Busiest week
Sept 2021 quarter

Year ended September 2021

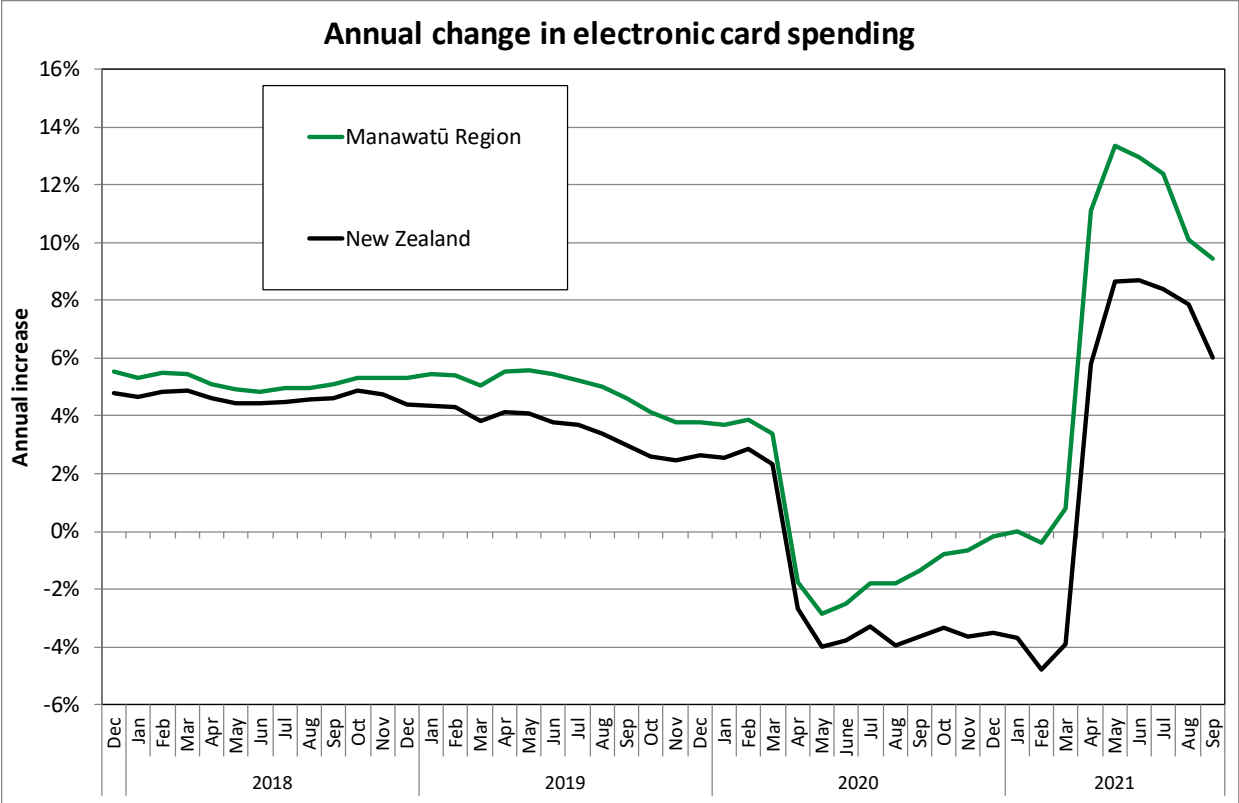
Annual spending in the region in the year to September 2021 was \$1,562 million, increasing by 9.4% from the previous year.

Retail spending in New Zealand was \$65,779 million, increasing by 6.0%.

Spending in Manawatū District increased by 11.7% in the year ended September 2021 while the growth rate in Palmerston North was 9.0%.

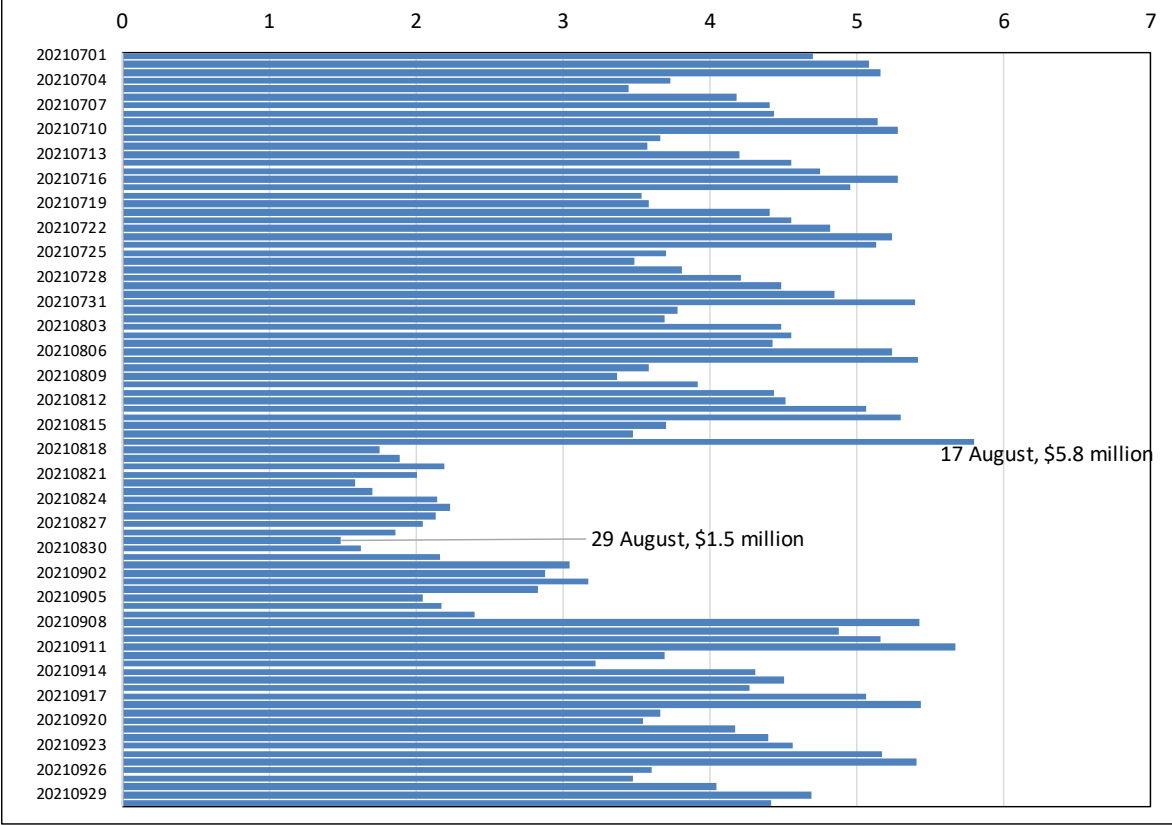


	September 2021 quarter		Year ended September 2021		
Cardholder origin	Value of spending (\$m)	Change (from same quarter last year)	Value of spending (\$m)	Change (from last year)	% share of spending
Locals	281.3	-4.5%	1,192.7	7.5%	76.3%
Rest of Horizons region	42.6	-9.0%	193.2	14.6%	12.4%
Rest of New Zealand	32.9	-11.3%	163.2	21.2%	10.4%
International	3.7	56.3%	13.2	-12.4%	0.8%
Total spending at Manawatū region merchants	360.4	-5.3%	1,562.2	9.4%	100.0%
Total spending in New Zealand	14,537.2	-8.0%	65,779.0	6.0%	

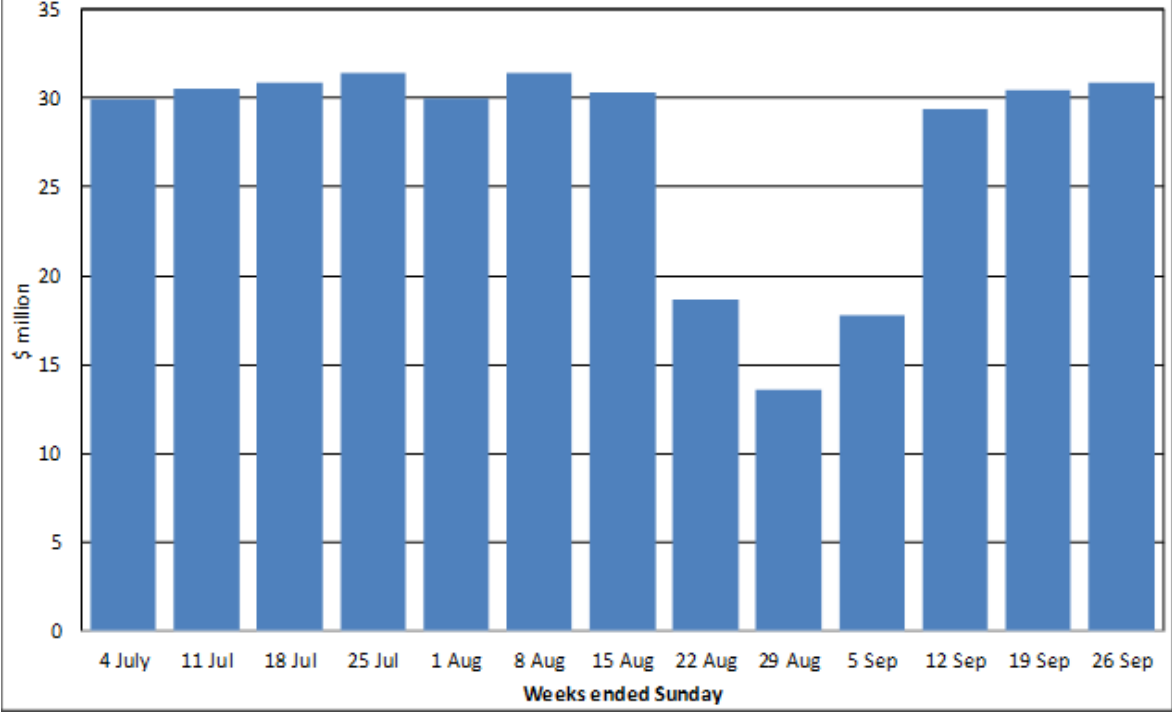


The busiest day for the region is Saturdays, the busiest week in the September quarter was the week ended Sunday 25 July (last week of the July school holidays). The fastest growth category in the quarter was Groceries and liquor (reflecting the impact from the COVID-19 restrictions in August and early September). The day with the highest spend was 17 August – we went into Level 4 restrictions at midnight.

Manawatū region daily retail spending (\$ million)



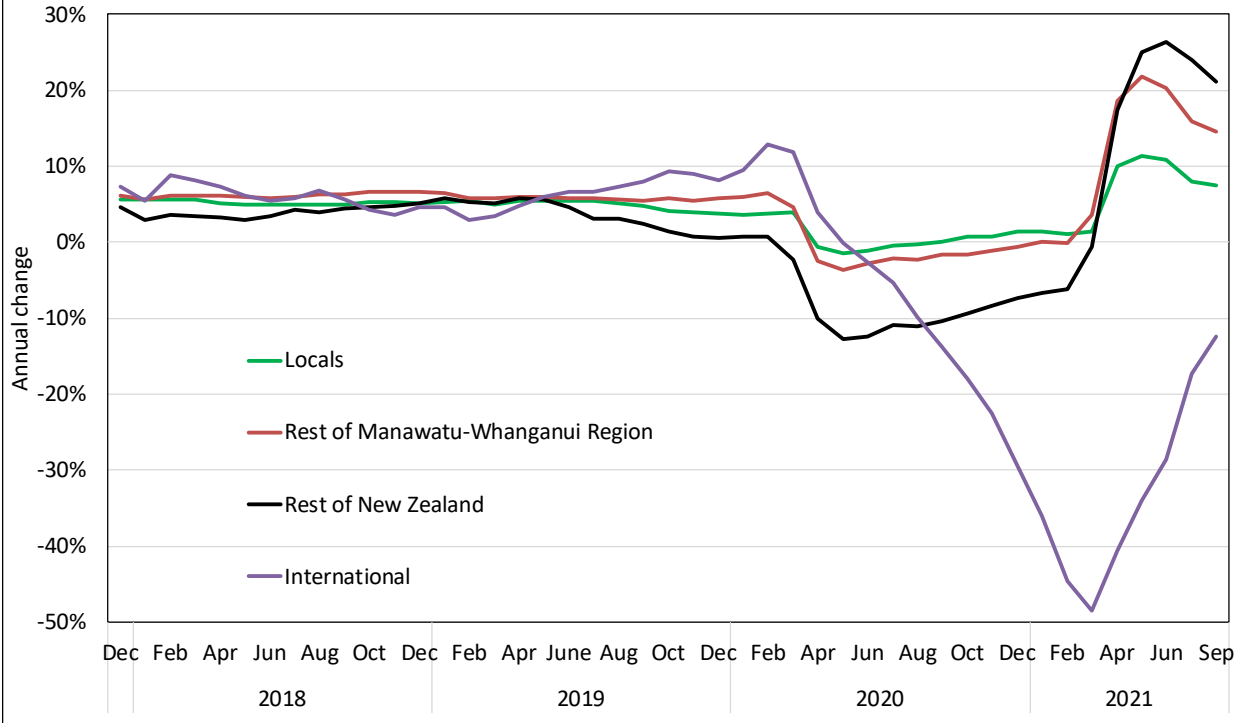
Value of weekly electronic card retail spending in the Manawatū region





	September 2021 quarter		Year ended September 2021	
Cardholder origin	Value of spending (\$m)	Change (from same quarter last year)	Value of spending (\$m)	Change (from last year)
Resident spending locally	281.3	-4.5%	1,192.7	7.5%
Resident spending outside region	51.0	-11.5%	260.1	18.7%
Total resident spending	332.2	-5.6%	1,452.8	9.3%
Visitor spending	79.1	-8.2%	369.5	16.1%
Net gain in spending for region	28.2	-1.6%	109.4	10.5%
Total spending at Manawatū region merchants	360.4	-5.3%	1,562.2	9.4%
Manawatū region loyalty rate	84.7%		82.1%	
% share of Manawatū region resident spending at Manawatū retailers				
Visitor share of Manawatū region spending	22.0%		23.7%	

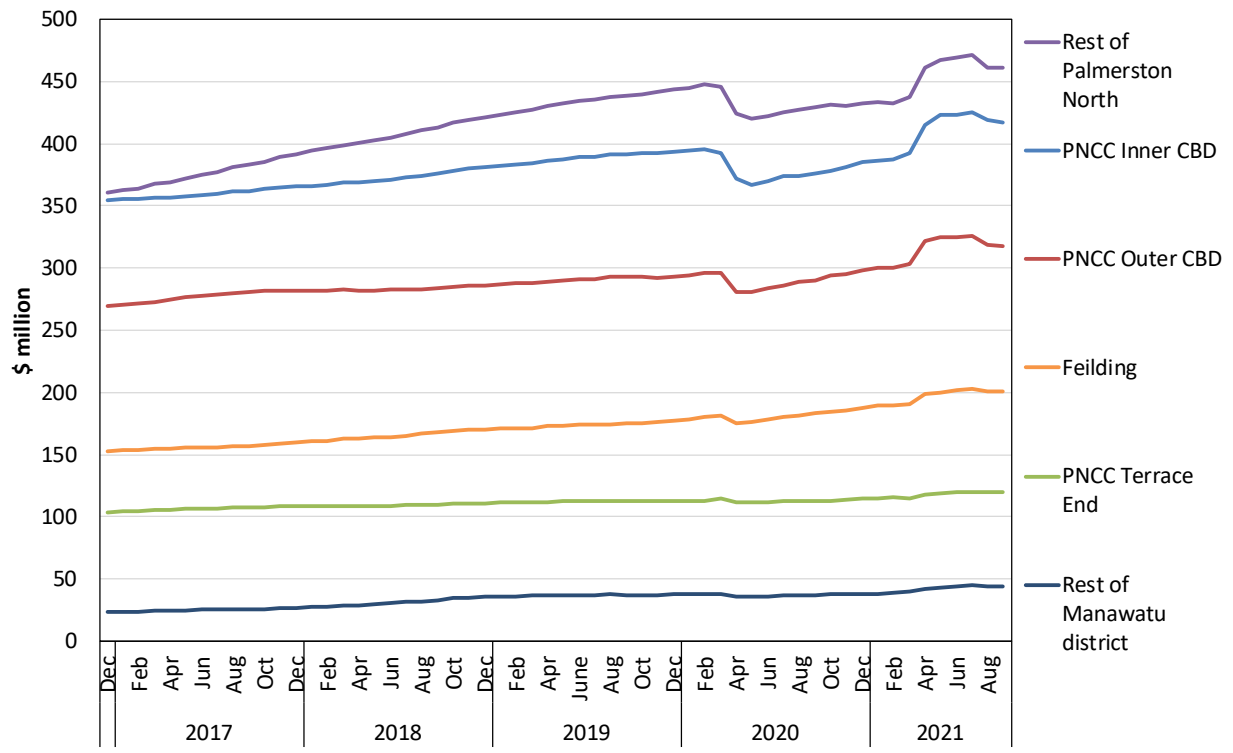
Annual change in Manawatū region electronic card retail spending
(origin of spending at Manawatū merchants)





Cardholder origin	September 2021 quarter		Year ended September 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	94.8	-5.4%	417.4	11.1%	26.7%
Palmerston North Outer CBD	70.8	-9.0%	317.9	9.4%	20.3%
PNCC Terrace End	29.4	1.8%	120.1	6.5%	7.7%
Rest of Palmerston North	107.6	-7.2%	461.0	7.5%	29.5%
Total Palmerston North	302.5	-6.3%	1,316.3	9.0%	
Feilding	47.7	-0.8%	201.3	10.0%	12.9%
Rest of Manawatū District	10.2	3.3%	44.6	20.2%	2.9%
Total Manawatū district	57.9	-0.1%	245.9	11.7%	
Total Manawatū region	360.4	-5.3%	1,562.2	9.4%	100.0%

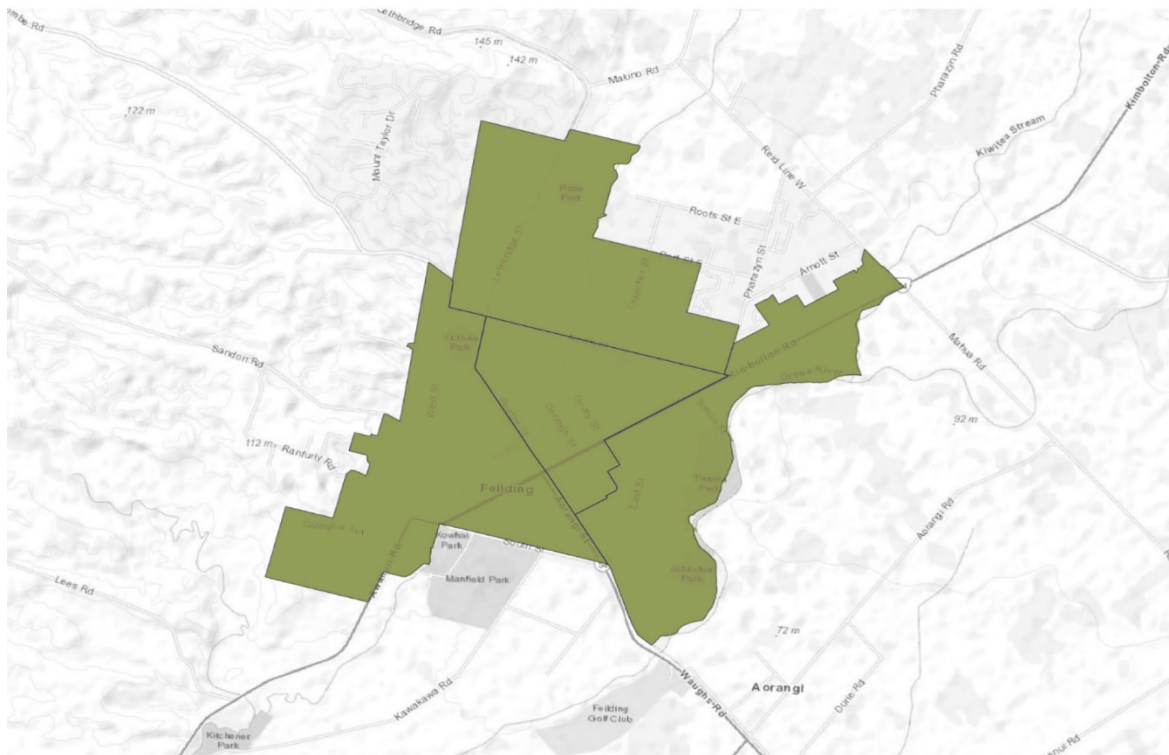
Annual electronic card retail spending by retail precinct



Palmerston North Retail Precincts



Manawatū District Retail Precincts

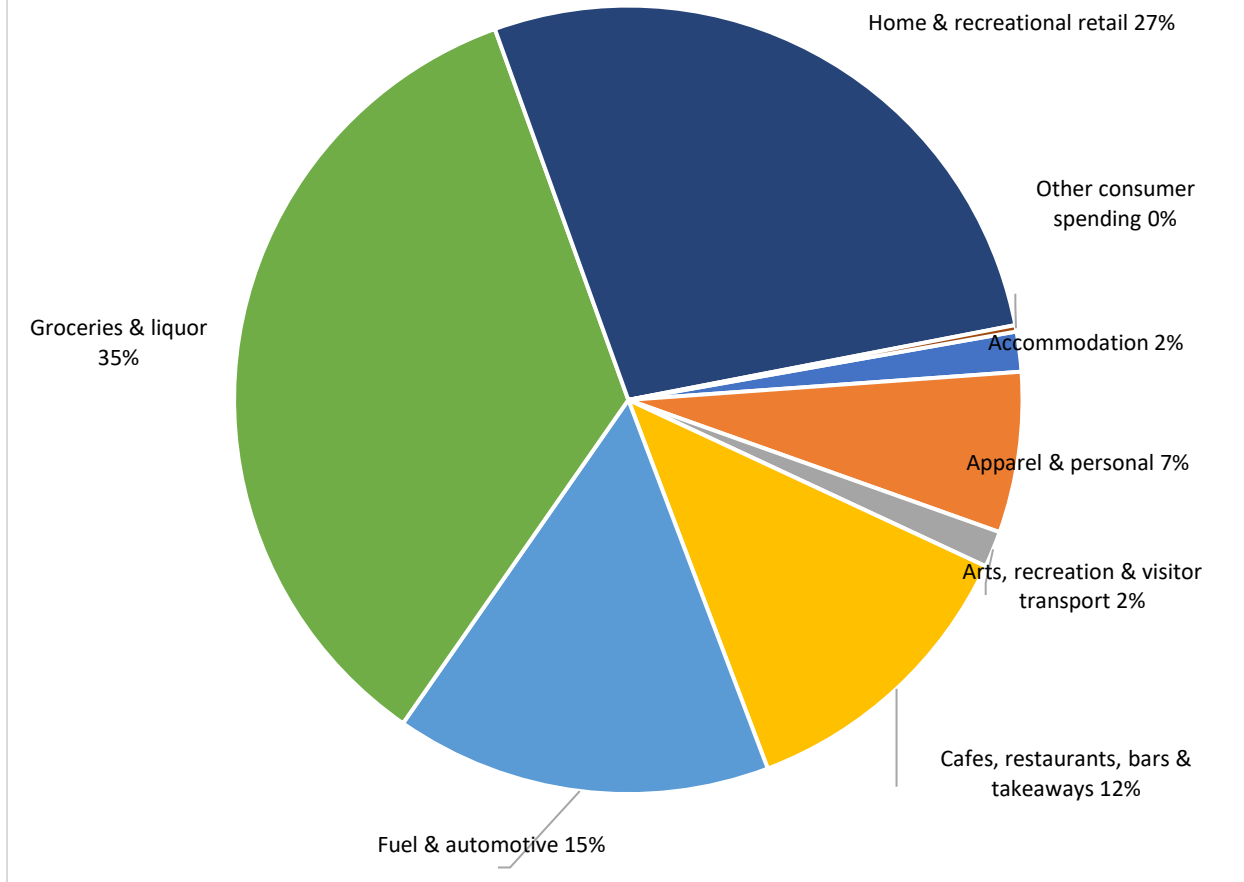




	Manawatū region	
Cardholder origin	Value of spending (\$m)	Change (from last year)
Accommodation	25.6	19.3%
Apparel & personal	102.9	21.5%
Arts, recreation & visitor transport	23.2	-20.9%
Cafes, restaurants, bars & takeaways	192.3	25.6%
Fuel & automotive	241.2	12.7%
Groceries & liquor	543.9	4.7%
Home & recreational retail	429.0	19.7%
Other consumer spending	4.1	-7.8%
Total	1,562.2	12.9%

	New Zealand		
	Value of spending (\$m)	Change (from last year)	Manawatū region share of New Zealand
Accommodation	1,429.7	-7.7%	1.8%
Apparel & personal	3,984.9	18.5%	2.6%
Arts, recreation & visitor transport	1,507.4	-24.2%	1.5%
Cafes, restaurants, bars & takeaways	9,319.8	18.9%	2.1%
Fuel & automotive	9,795.9	7.6%	2.5%
Groceries & liquor	23,724.0	3.3%	2.3%
Home & recreational retail	15,675.1	16.1%	2.7%
Other consumer spending	342.4	18.2%	1.2%
Total	65,779.0	8.7%	2.4%

Distribution of Manawatū region spending by sector



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 & hiring
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	September 2021 quarter		Year ended September 2021		
	Value of spending (\$m)	Change (from last year)	Value of spending (\$m)	Change (from last year)	% share of spending
Locals	281.3	-4.5%	1,192.7	10.8%	76.3%
Rangitikei District	10.7	-9.3%	48.4	16.3%	3.1%
Ruapehu District	0.9	-23.3%	4.7	21.4%	0.3%
Whanganui District	5.0	-11.7%	23.0	30.6%	1.5%
Rest of Manawatū-Whanganui region	26.0	-7.8%	117.0	20.1%	7.5%
Auckland Region	5.4	-5.1%	27.2	17.8%	1.7%
Wellington Region	10.7	-9.9%	51.4	24.8%	3.3%
Rest of New Zealand	16.8	-14.0%	84.6	30.4%	5.4%
International	3.7	56.3%	13.2	-28.3%	0.8%
Total	360.4	-5.3%	1,562.2	13.0%	100.0%

Annual customer origin for Manawatū retailers

