



Nelson
City Council

Te Kaunihera o
Whakatū

Retail Spend Update December 2025

Retail Headline Updates

Current Q vs Same Q
Last Year

0%

Change in Cardholder Spend
in Nelson

▲ 6%

International Spend in Nelson

Year to Current
Quarter

\$837m

Spend total for Nelson by
Nelson Cardholders

61%

Of the Year Total Spend in
Nelson City was by Locals

Quarterly Summary

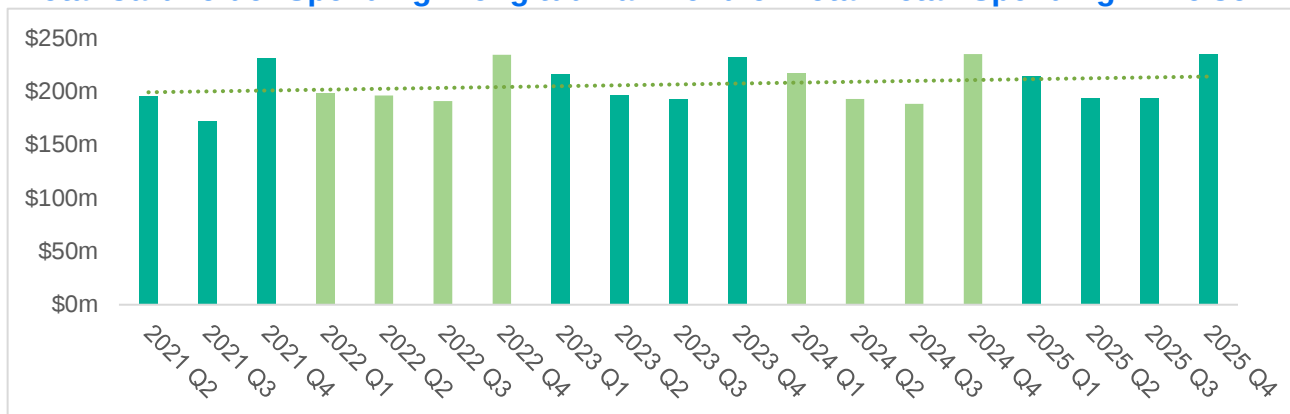
Nelson recorded a net spend gain of \$26 million this quarter, with spending by non-locals exceeding the amount Nelsonians spent elsewhere.

Nelsonians spent 72% locally, Tasman spending in Nelson is up 17%, and International spend saw a 6% lift, all contributing to the overall inflow.

Total cardholder spend saw no change from the same quarter last year, as longitudinal trends suggest growth is beginning to plateau.

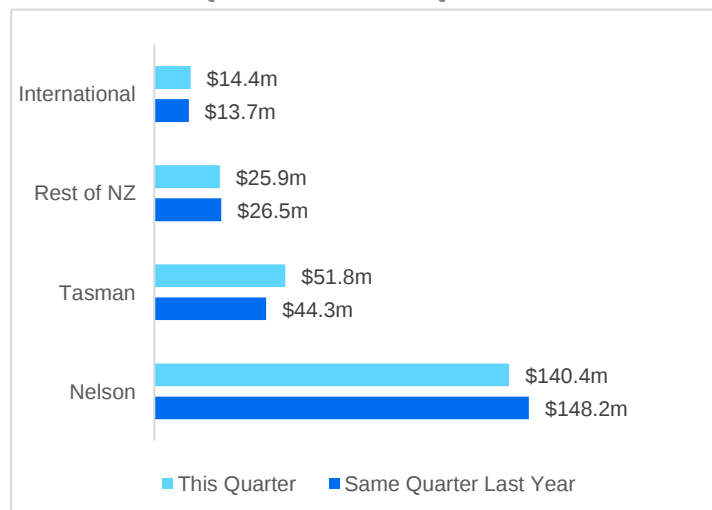
Groceries and liquor remain the top spending categories, with department stores and leisure ranking second.

Total Cardholder Spending: Longitudinal Trend of Total Retail Spending in Nelson



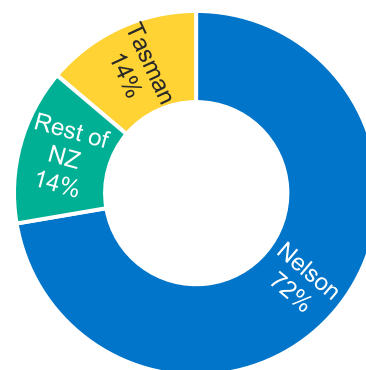
Origin of Cardholder Spend in Nelson:

Current Quarter with Same Quarter Last Year



Nelson Cardholder Spending:

Where Nelsonians Allocate Their Spending in Current Q



Location	Spend	Nelson residents spent
Nelson	\$140.35m	72% locally
Tasman	\$26.81m	
Rest of NZ	\$26.90m	

Flow of Spending in Nelson
By Quarter

Total Inflow \$79.82 million

The total amount spent in Nelson from non-locals

Total Outflow \$53.71 million

The total amount spent by Nelson in the rest of NZ

Quarter	Inflow	Outflow (\$m)	Net
2025 Q4	\$79.82m	\$53.71m	\$26.11 m
2025 Q3	\$63.59m	\$47.33m	\$16.26 m
2025 Q2	\$64.41m	\$46.98m	\$17.43 m
2025 Q1	\$73.01m	\$52.88m	\$20.12 m

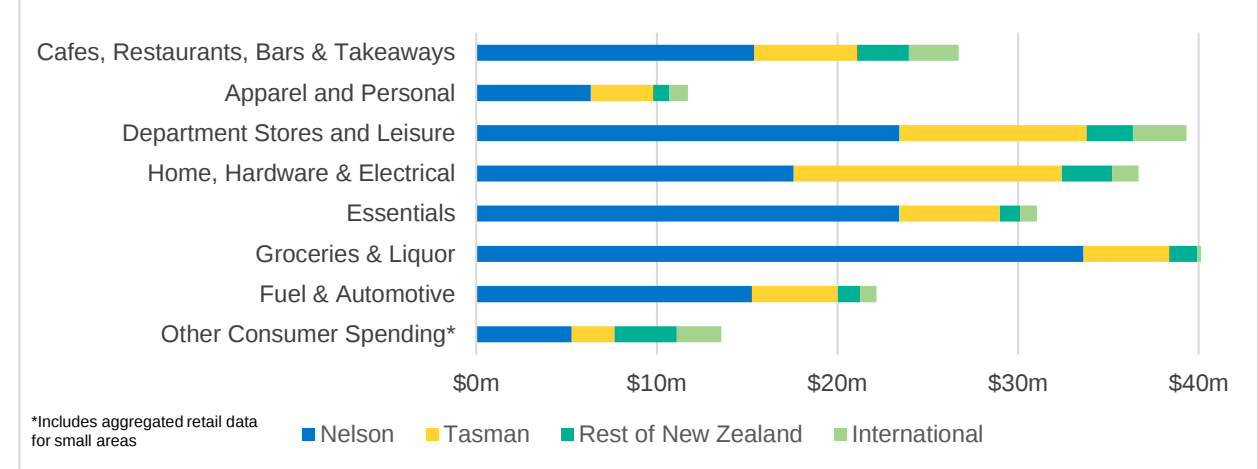
Net Flow \$26 million

Total expenditure from non-locals exceeded what Nelsonian's spent elsewhere in the last quarter

Spend in Nelson by Customer Origin

Current Q vs Same Q Last Year				YTD Current Q vs YTD Same Q LY		
Origin	%	\$	Change	%	\$	Change
Nelson	59.8%	\$140.35m	-5%	60.8%	\$508.33m	-5%
Tasman	22.1%	\$51.82m	17%	21.2%	\$177.33m	19%
Marlborough	2.0%	\$4.65m	5%	2.0%	\$16.85m	-4%
Rest of NZ	10.0%	\$23.35m	-4%	10.4%	\$86.65m	-1%
International	6.1%	\$14.41m	6%	5.7%	\$47.52m	9%
Total		\$234.58m	0%		\$836.67m	0%

Category Breakdown by Current Quarter in Nelson



Total Cardholder Spend in Region

Merchant Location	Year to Jun 25	Annual Change
City Centre	\$ 195,799,320	1%
City Fringe	\$ 123,392,188	-6%
Stoke	\$ 88,011,393	2%
Tahunanui	\$ 31,659,292	-5%
Rest of Nelson City	\$ 397,809,588	3%
Richmond CBD	\$ 317,642,200	-1%
Rest of Richmond	\$ 87,475,182	3%
Rest of Tasman	\$ 463,003,712	0%
Total	\$ 1,704,792,875	0%

Regional Cardholder Distribution for Current

