

Market View analysis of Auckland liquor retailers

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The following media package analyses data obtained from Market View for liquor store transactions in the Auckland Region by collating EFTPOS sales records at alcohol bottle shops between September 2020 to September 2021.

This data is being made available by The Helen Clark Foundation to journalists, researchers and the public in general as part of our commitment to making new research available to everyone.

The data is presented in a spreadsheet and includes the following:

- Market View Sales Data for EFTPOS transactions from liquor stores in Auckland. This data is broken into the former territorial authorities due to the way it was collected.
- A list of all on and off licence counts within Auckland for 2020 as well as risk assessments. This data is collected by the Auckland Regulatory Licensing Authority. An up-to-date list has been requested.

Market View analyses EFTPOS transactions through 515 off-licence premises to calculate total market value. Their data collection has limitations in that it excludes cash sales, online credit card orders, supermarkets and grocery stores.

The following pages summarise the data and break down some key findings. Contacts for experts within the alcohol research space are included at the end of this document.

Off licence market share

Off-licences make up 77.4 per cent of alcohol sales within New Zealand every year (Euromonitor International, Alcoholic Drinks in New Zealand Report, 2021). The Auckland Regulatory of Licensing Committee [2021 report lists](#) a total of 1099 off licences in total around Auckland. That equates to one store for every 1500 people regardless of age.



Off-trade vs On-trade | Historical | % breakdown

Geography	Category	Categorization Type	Data Type	2015	2016	2017	2018	2019	2020
New Zealand	Alcoholic Drinks	Off-Trade Volume %	Total Volume	72.8	72.9	73.1	73.1	73.1	77.4
New Zealand	Alcoholic Drinks	On-Trade Volume %	Total Volume	27.2	27.1	26.9	26.9	26.9	22.6
New Zealand	Alcoholic Drinks	Total	Total Volume	100.0	100.0	100.0	100.0	100.0	100.0

Research Sources:

Alcoholic Drinks: Euromonitor from trade sources/national statistics

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Liquor-retailers make up 53.6% of all sales from off-licences. Market View data show these retailers will sell \$666.6 million worth of products every year or \$1.826 million per calendar day.

Supermarkets are not included in Market View records nor are grocery stores where a dedicated till is used for alcohol sales. Euromonitor International 2021 lists alcohol from supermarkets to be 40.4 per cent of all off-licence alcohol sales.

Channel Distribution for Alcoholic Drinks in New Zealand

Off-trade Volume 2020 and Percentage Point Growth - 2015-2020

Channel	% Breakdown 2020	% Breakdown 2015
Store-Based Retailing		94.0
Grocery Retailers		97.9
Modern Grocery Retailers		43.0
Supermarkets		43.0
Traditional Grocery Retailers		54.9
Food/drink/tobacco specialists		54.9
Non-Store Retailing		2.1
E-Commerce		2.1



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Liquor retailer spend per region

Market View Data has been broken down into the old, territorial authority districts to produce the following results.

Row Labels	Sum of Spend	Number of Transactions
Auckland City	\$239,560,133	5,746,266
Franklin District	\$31,526,154	724,354
Manukau City	\$112,337,504	2,929,382
North Shore City	\$94,712,079	2,344,879
Papakura District	\$23,966,431	607,145
Rodney District	\$65,777,492	1,574,190
Waitakere City	\$98,752,159	2,655,851
Grand Total	\$666,631,952	16,582,067

Comparing these territorial authorities into average sale prices and their respective market shares produces the following results:

Authority	Average \$ per sale	Market Share
Auckland City	\$41.7	35.9
Franklin City	\$43.5	4.7
Manukau	\$38.3	16.9
North Shore	\$40.4	14.2

Papakura	\$39.5	3.6
Rodney	\$41.8	9.9
Waitakere	\$37.2	14.8

Auckland City commands the liquor retailer market having the highest market share as well as the third-highest average sale price. Franklin City and Rodney have higher average sale prices but their combined Market Share is only half that of Auckland.

Off licence numbers by suburb

Information provided by the Auckland District Health Board allows for counts of off and on licences to be broken down into suburbs. The 2020 data has been provided to The Helen Clark Foundation for research purposes. The 2021 data will be circulated once available.

Data from the 2020 Auckland Regional Public Health Service (ARPHS) records the location of 895 off licences. This data reveals an average of 5 off licences per suburb (calculated with 166 distinct suburbs identified within the document).

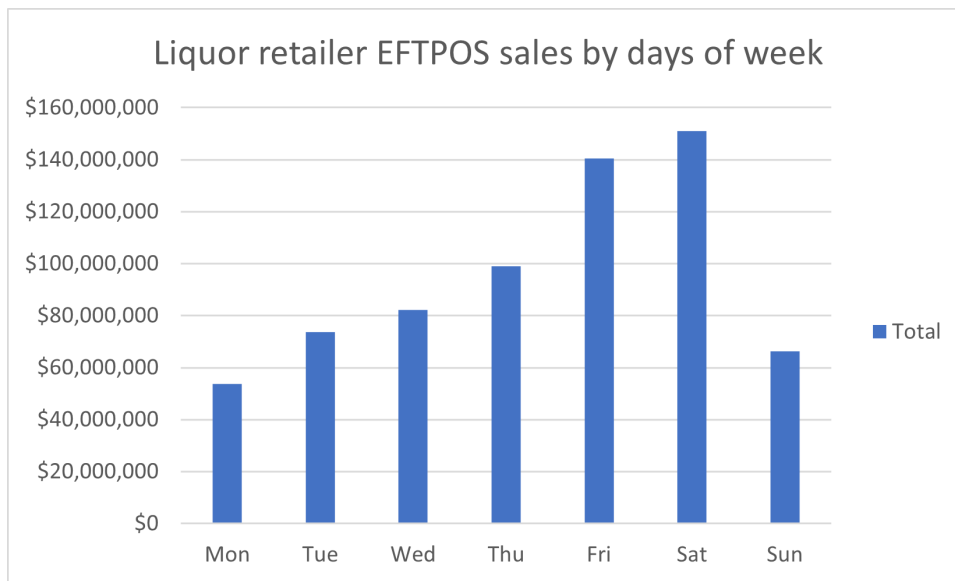
Auckland Central has thirteen times as many off-licenses than the average with the suburb recording 66 off-licence addresses in the central location which will equate to the large volume of sales within that location. The spreadsheet included with this media package allows for more robust breakdowns of these numbers via an Excel Pivot Table.

Days of the week

The yearly total for alcohol sales per day of the week produces the following results.

Row Labels	Sum of Spend	Number of Transactions
Mon	\$53,828,268	1,413,791
Tue	\$73,745,573	1,827,899
Wed	\$82,115,691	2,100,815
Thu	\$99,084,209	2,396,144
Fri	\$140,523,746	3,464,673
Sat	\$151,008,516	3,644,275
Sun	\$66,325,949	1,734,470
Grand Total	\$666,631,952	16,582,067

This falls into expected predictions with Friday and Saturday having higher total sales than other days of the week and Monday having the least amount of alcohol spend.



The number of transactions follows a near-identical trend to the above data reflecting the higher volume of sales relates to higher revenue for retailers.

Times of day

Market View Data also provides insight into the time of the day at which alcohol is sold. Due to the limitations of collecting the data, time bands had to be used with 9 am to 3 pm placed into one category to represent the “day-time” sales.

Row Labels	Sum of Spend	Number of Transactions
9am - 3pm	\$233,144,720	4,786,252
3pm - 5pm	\$167,359,243	4,087,959
5pm - 7pm	\$158,873,739	4,480,801
7pm - 9pm	\$80,355,082	2,403,600
9pm - 11pm	\$26,369,103	813,165
11pm - midnight	\$530,065	10,290
Grand Total	\$666,631,952	16,582,067

Comparing total sales volumes to time periods data shows **60.1** per cent of alcohol sales take place before 5 pm. By 7 pm that figure increases to **83.9** per cent.

By 9 pm the total volume of sales for the day reaches **96** per cent.

In Auckland, alcohol can be sold up to 11 pm but this data says any sales after 9 pm make up just **four per cent** of total EFTPOS sales.

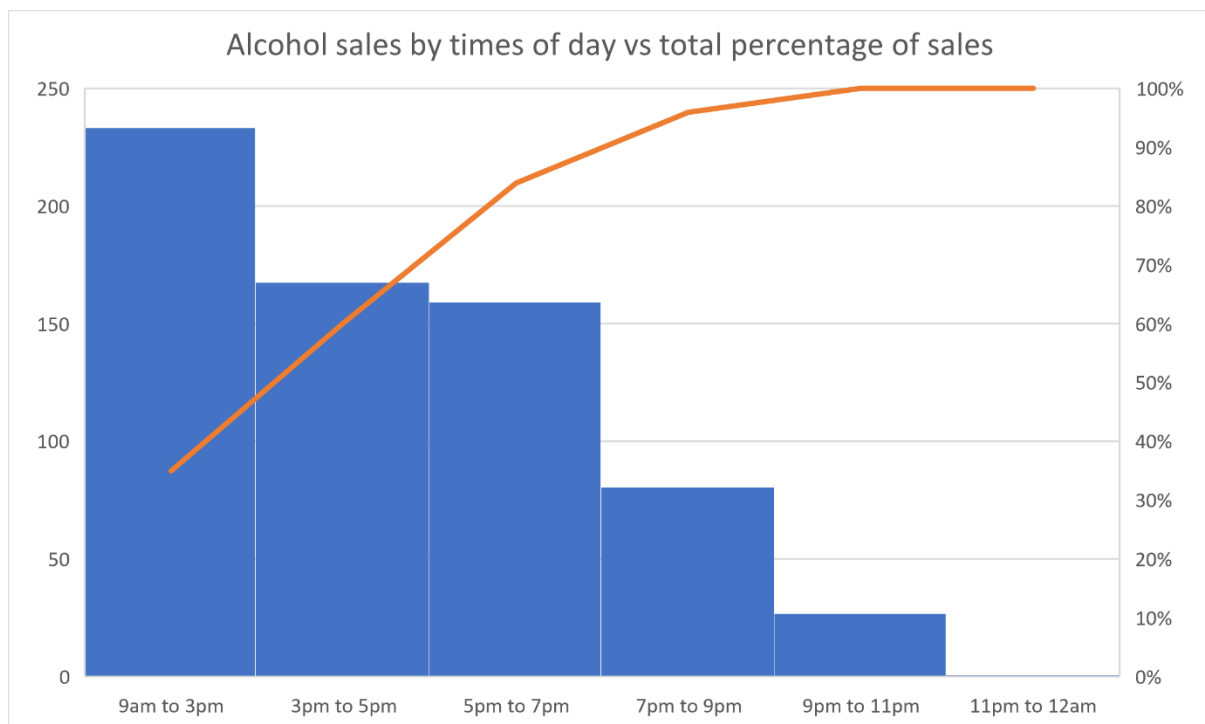
It is clear that the calls from public health experts to bring the off-license closing hours back to 9pm would do little harm to their businesses and at the same time provide substantial benefits in terms of reducing late-night alcohol harm.

The percentages of sales within each time slot are as follows:

- 9am to 3pm = 35 per cent
- 3pm to 5pm = 25.1 per cent
- 5 pm to 7pm = 23.8 per cent
- 7 pm to 9pm = 12.1 per cent
- 9 pm to 11pm = 3.9 per cent
- 11pm – midnight = >1 per cent

These figures are represented on the following graph.

Market View Data also shows a declining trend in the volume of sales at later times of the day. Between 9 pm and 11 pm, the average purchase price per transaction falls to \$32.48.



Sales at 11 pm

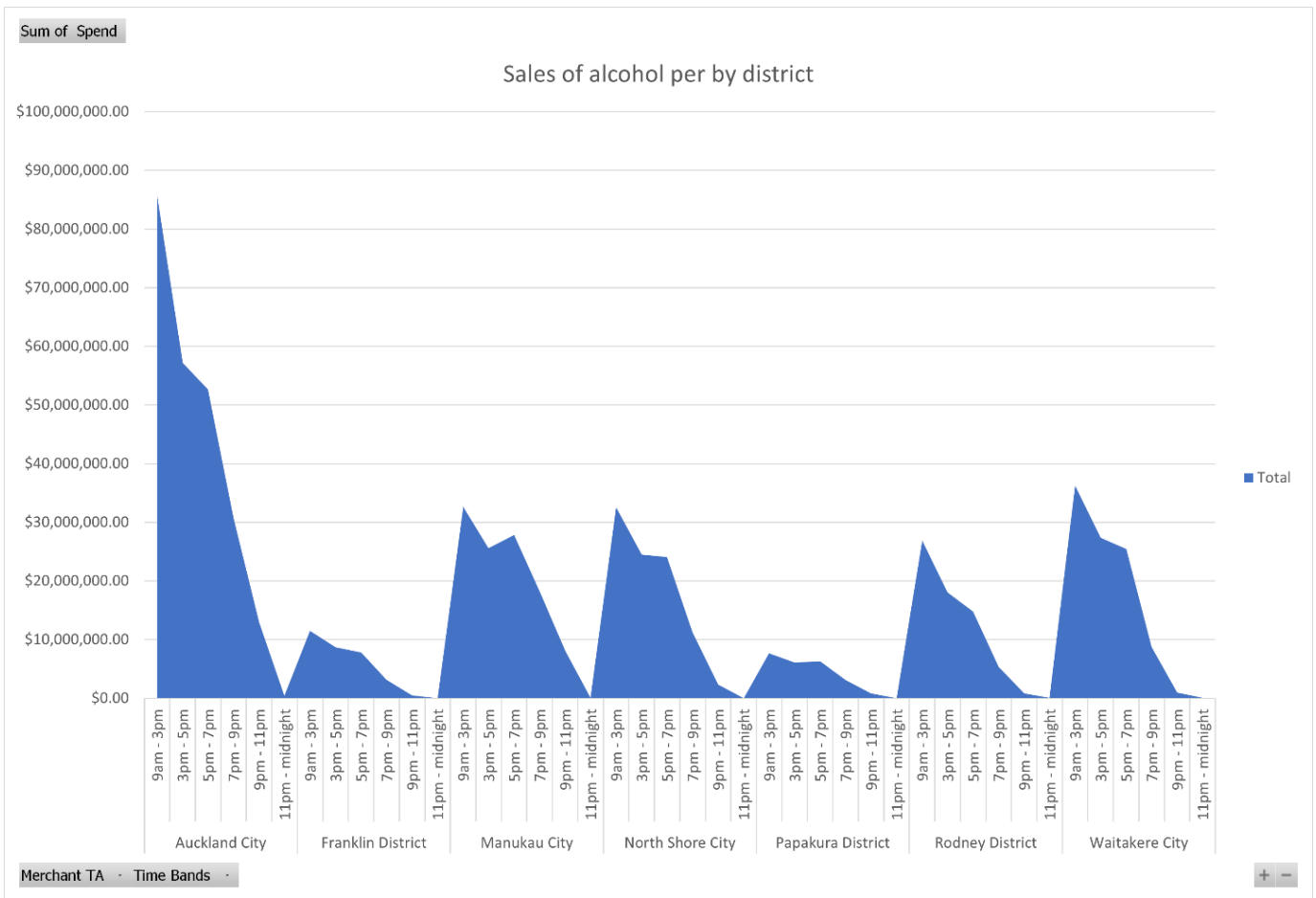
Data captured a small volume of sales occurring between 11 pm and midnight. Due to the manner data is captured this system will record sales at the closing time of 11 pm with liquor retailers having to cease selling alcohol at 11.01 pm.

The data also does not collate “cash sales” and only records EFTPOS transactions.

A breakdown of sales between 11 pm and midnight are included below:

Row Labels	Sum of Spend	Number of Transactions
11pm - midnight	\$530,065.00	10,290
Auckland City	\$393,162.00	6,945
Franklin District	\$7,952.00	43
Manukau City	\$39,975.00	1,055
North Shore City	\$9,164.00	213
Papakura District	\$118.00	8
Rodney District	\$34,584.00	374
Waitakere City	\$45,110.00	1,652
Grand Total	\$666,631,952.0	16,582,067

Most markets follow the same general trend when it comes to alcohol sale totals and time period. A slight exception to this is Manukau which has a slight upshift in alcohol purchased between 5 pm and 7 pm compared to 3pm and 5pm which the graph on the following page captures well.



Notable days

Included within the data, it is possible to see trends on specific days of the year. Some holiday dates are included below:

Christmas Eve	\$8,219,757	Waitangi Day	\$2,932,767
New Years Eve	\$4,969,529	Good Friday (Eve)	\$4,354,761
Waitangi Day	\$2,932,767	New Years Day	\$1,182,164

In 2021 a major day for alcohol sales was August 17 which was the day Prime Minister Jacinda Ardern announced a nationwide lockdown. During this time there was a 500-plus per cent increase in sales on the previous three weeks with \$5,792,110 worth of sales taking place. Most of these occurred after the Prime Minister had made her announcement. Between 5 pm and 9pm, there was \$1.2 million worth of sales.

The spreadsheet includes dates and times to allow an analysis of bespoke days by searching the date or using the Excel date codes.