



Retailwatch














Value of electronic card transactions within retail categories

Period ending 28/02/2019

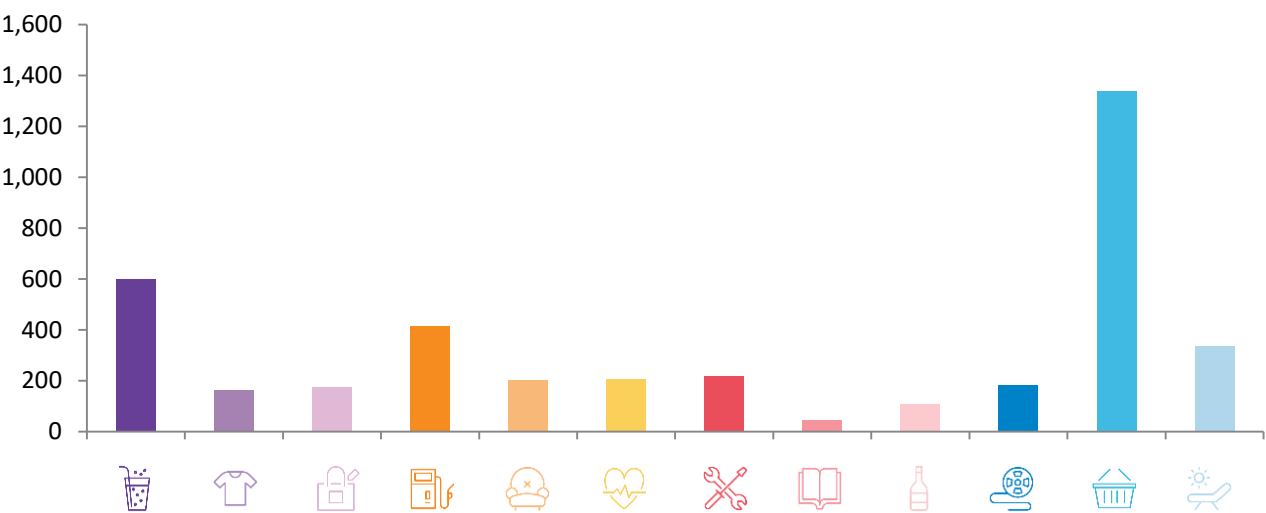
Total retail spend in New Zealand for the 28 days ending 28 February 2019 was \$4 billion. This was an increase of 3.6% compared to January and an increase of 4.2% compared to the same period last year.

Spending was up in nine of the twelve categories year-on-year; the largest increase was in the Recreation & Entertainment category, up 15.4%. The largest decrease year-on-year was in the Books & Stationery Stores category, dropping 5.0%.

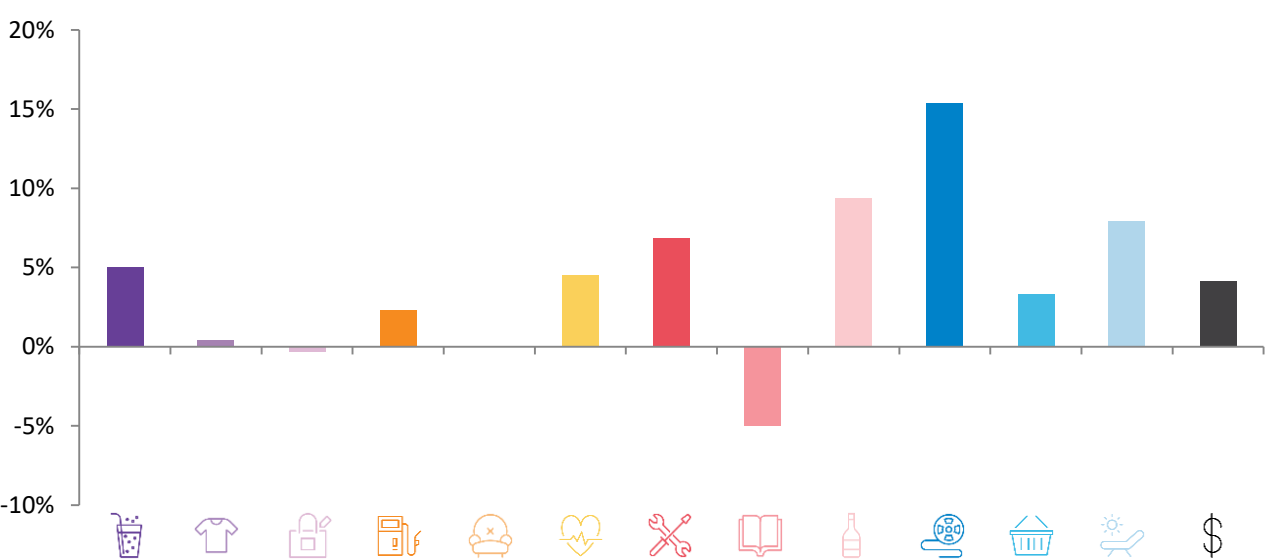
Month-on-month, eight of the twelve categories experienced increases in spend. The greatest of these was in the Health Goods & Services category (+27.9%). The Books & Stationery Stores category dropped by the most compared to January, declining 6.1%.

Retailer Category	Month Total \$M	% Change vs Prior Month	% Change vs Last Year	% Share
 Cafés, Restaurants & Bars	599	3.9%	5.0%	15.0%
 Clothing & Footwear	165	-5.3%	0.4%	4.1%
 Department Stores	177	-4.9%	-0.3%	4.4%
 Fuel & Service Stations	415	5.2%	2.3%	10.4%
 Furniture, Appliances & Electronics	202	5.6%	0.0%	5.1%
 Health Goods & Services	208	27.9%	4.5%	5.2%
 Home & Building Supplies	217	-1.5%	6.9%	5.4%
 Books & Stationery Stores	46	-6.1%	-5.0%	1.2%
 Liquor Stores	109	6.2%	9.3%	2.7%
 Recreation & Entertainment	182	1.0%	15.4%	4.6%
 Supermarkets & Food Retailers	1,337	4.3%	3.3%	33.5%
 Travel & Accommodation	336	0.5%	7.9%	8.4%
 TOTAL RETAIL SPEND	3,993	3.6%	4.2%	100%

Monthly retail spend by category (\$M)



Change vs last year



Quarterly summary

February 2018














The total quarterly retail spend for the 91 days ending 28 February 2019 was \$13.6 billion. This was an increase of 3.4% when compared to the previous quarter and an increase of 2.9% when compared to the same period last year.

Nine of the twelve categories experienced increases in spend when compared to the previous quarter. The largest of these increases was in the Books & Stationery Stores category, up 26.0%. Of the three declines in spend, the Health Goods & Services category experienced the largest again, dropping 8.1%.

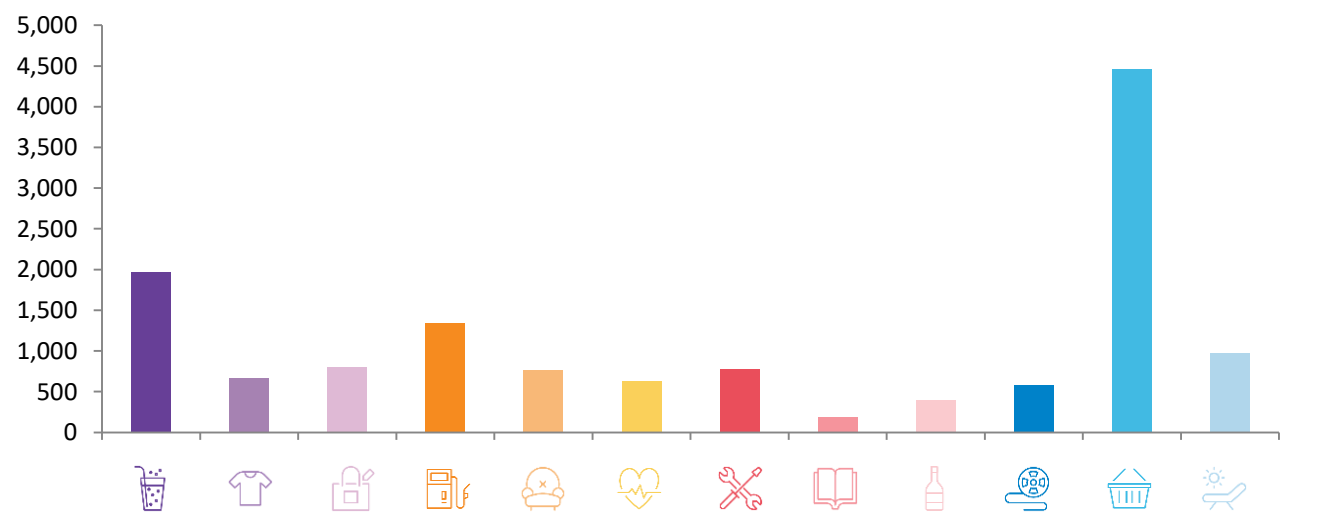
Compared to the same quarter of the previous year, eight categories experienced increases in spend. The largest of these was in the Recreation & Entertainment category, increasing 10.4%. The Books & Stationery Stores category had the greatest decline in February, dropping 8.1%.

Quarterly summary

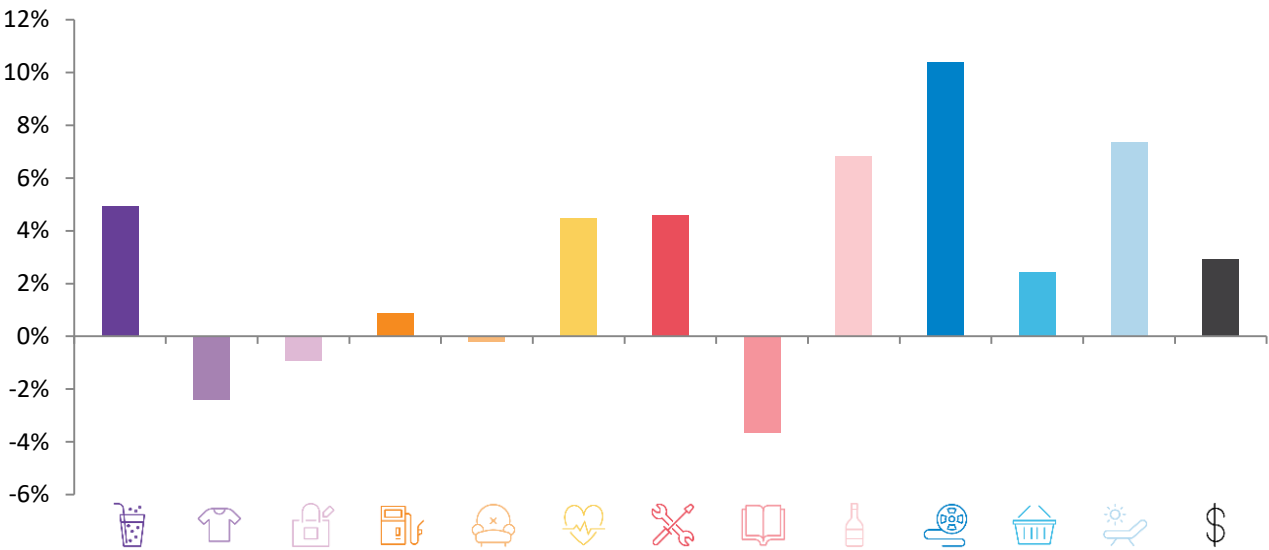
February 2019

Retailer Category	Quarter Total \$M	% Change vs Prior Quarter	% Change vs Last Year	% Share
 Cafés, Restaurants & Bars	1,976	0.9%	4.9%	14.6%
 Clothing & Footwear	663	7.6%	-2.4%	4.9%
 Department Stores	800	17.3%	-0.9%	5.9%
 Fuel & Service Stations	1,345	-4.3%	0.9%	9.9%
 Furniture, Appliances & Electronics	770	4.3%	-0.2%	5.7%
 Health Goods & Services	628	-8.1%	4.5%	4.6%
 Home & Building Supplies	783	-2.5%	4.6%	5.8%
 Books & Stationery Stores	182	26.0%	-3.7%	1.3%
 Liquor Stores	398	18.2%	6.8%	2.9%
 Recreation & Entertainment	585	6.4%	10.4%	4.3%
 Supermarkets & Food Retailers	4,461	4.3%	2.4%	32.9%
 Travel & Accommodation	981	5.6%	7.3%	7.2%
 TOTAL RETAIL SPEND	13,572	3.4%	2.9%	100%

Quarterly spend by category (\$M)



Change vs last year



Selected regions of interest

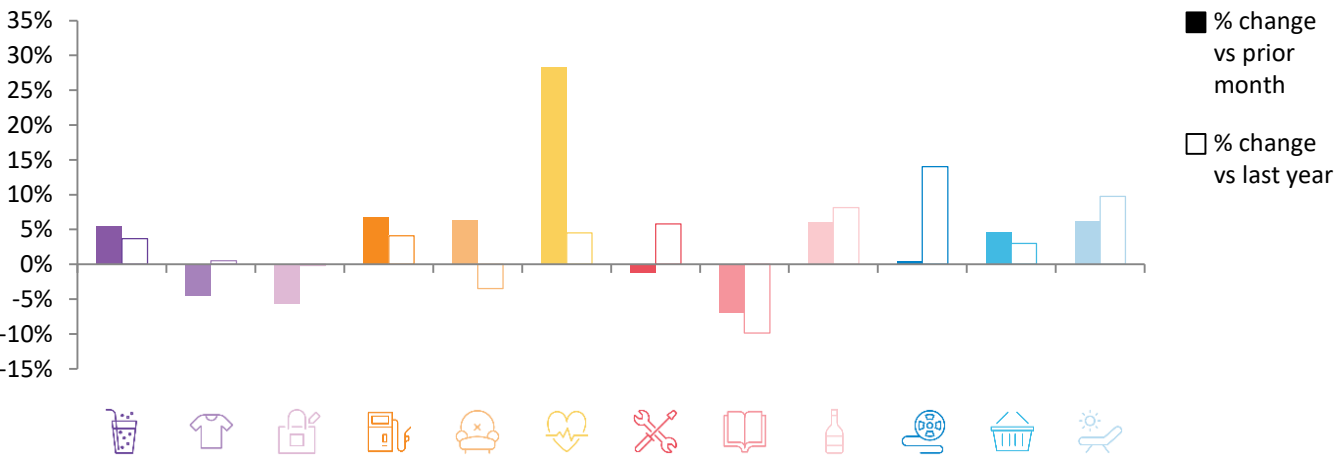
February 2019

Monthly trends for Auckland

Retail spend in the Auckland region for the 28 days ending 28 February 2019 was \$1.5 billion. This represents an increase in spend of 4.7% from the previous month and 3.9% year-on-year.

Retail spending in the Auckland region was up in nine of the twelve categories compared to February of last year. The largest increase in year-on-year spend was seen in the Recreation & Entertainment category (+14.0%) while the greatest decrease was in the Books & Stationery Stores category (-9.9%).

Compared to January, eight of the twelve categories had an increase in spend. Going up was the Health Goods & Services category, increasing 28.4%. Going down was the Books & Stationery Stores category, decreasing 7.0%.

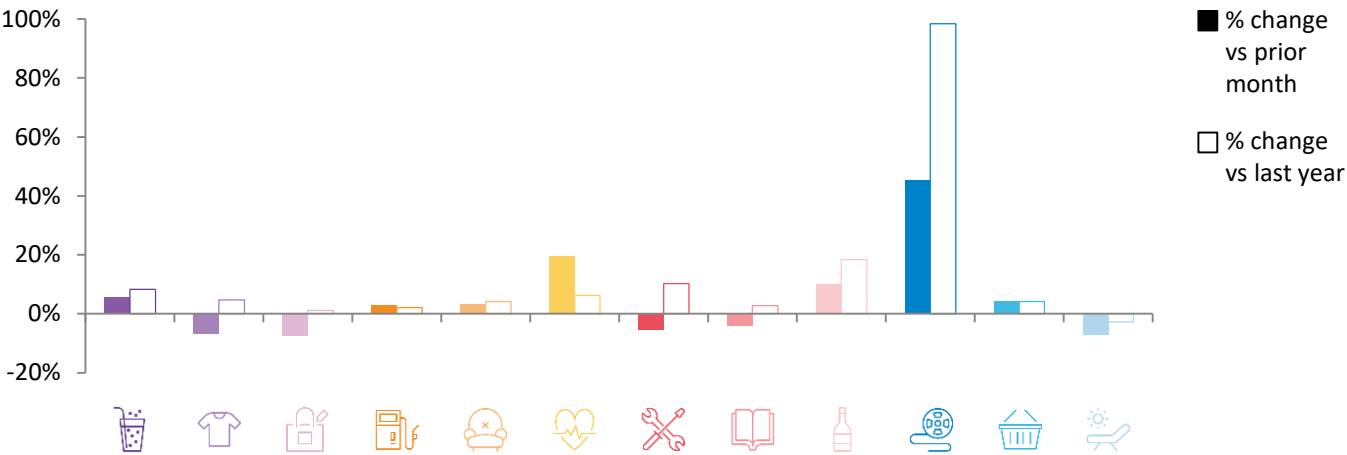


Monthly trends for Hawke’s Bay

Retail spend in the Hawke's Bay region for the 28 days ending 28 February 2019 was \$127 million. This represents increases of 3.9% against the previous month and 7.1% year-on-year.

Compared to February 2018, spend was down in just one category. The largest increase for Hawke’s Bay was in Recreation & Entertainment category, going up a massive 98.4%. The only decrease was in the Travel & Accommodation category, which went down 2.7%.

Month-on-month spending was up in seven of the twelve categories. The Recreation & Entertainment category had a 45.4% increase. At the other end of the scale, the Department Stores category had the greatest decrease, dropping 7.4%.

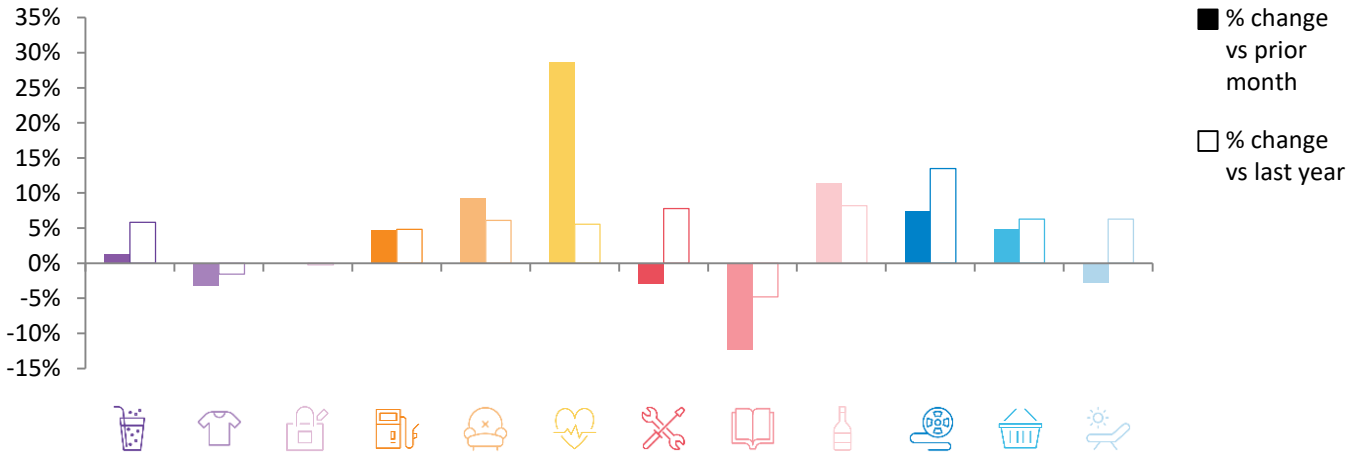


Monthly trends for Otago

Retail spend in the Otago region for the 28 days ending 28 February 2019 was \$196 million. This represents increases of 3.7% against the previous month and 5.6% year-on-year.

Compared to February 2018, spending was up in nine of the twelve categories. The Recreation & Entertainment category increased the most (+13.5%), while the greatest drop was in the Books & Stationery Stores category (-4.8%).

Month-on-month spend was up in seven categories. Going up was the Health Goods & Services category, increasing 28.7%, and going down was the Books & Stationery Stores category, decreasing 12.4%.



Going up this month

The greatest increase in spending this month was in the Health Goods & Services category, up 27.9%.

All regions experienced an increase in spend this month. The Auckland region went up the most, increasing 4.7%.

8

Categories up

16

Regions up

Going down this month

The largest decrease in spending this month was seen in the Books & Stationery Stores category, down 6.1%.

No regions experienced a decrease in spend this month.

4

Categories down

0

Regions down

About Retailwatch

- Retailer categories are taken from the Merchant Category Codes allocated by MasterCard and VISA
- \$ Values are represented in \$millions. New Zealand estimates are exclusive of GST. Overseas estimates may be subject to foreign taxes, which are not excluded
- Monthly and Quarterly periods of 28 days and 91 days were selected to ensure that the same number of weekdays/weekends are included for comparisons
- Data for this report comes from one of our Banking and Financial clients' Business Insight and is weighted to give national and regional totals



Disclaimer

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Online Retailwatch












Online retail market summary

Period ending 28/02/2019

Total online retail spend in New Zealand for the 28 days ending 28 February 2019 was \$565 million. This represents increases of 13.7% year-on-year and 2.0% from the previous month.

Online spending was up in seven of the ten categories year-on-year. The Department Stores category saw the greatest increase in spend, up 51.1%. The largest decrease year-on-year was once again in the Books & Stationery Stores category, declining 4.8%.

Month-on-month, seven categories experienced increases in spend. Going up was the Supermarkets & Food Retailers category (+20.1%) and the Liquor Stores category (+11.0%). Out of the 3 decreases this month, the Books & Stationery Stores category dropped the most (-28.3%).

Online Retailer Category		Month Total \$M	% Change vs Prior Month	% Change vs Last Year	% Share
	Clothing & Footwear	33.4	2.6%	-3.4%	5.9%
	Department Stores	17.6	-2.8%	51.1%	3.1%
	Furniture, Appliances & Electronics	46.1	6.9%	16.2%	8.1%
	Health Goods & Services	11.4	3.2%	7.6%	2.0%
	Home & Building Supplies	4.6	6.7%	-1.4%	0.8%
	Books & Stationery Stores	8.6	-28.3%	-4.8%	1.5%
	Liquor Stores	3.6	11.0%	5.1%	0.6%
	Recreation & Entertainment	125.5	8.7%	24.0%	22.2%
	Supermarkets & Food Retailers	53.5	20.1%	30.2%	9.5%
	Travel & Accommodation	261.5	-3.2%	8.2%	46.2%
	Total Online Retail Spend	565.6	2.0%	13.7%	100%

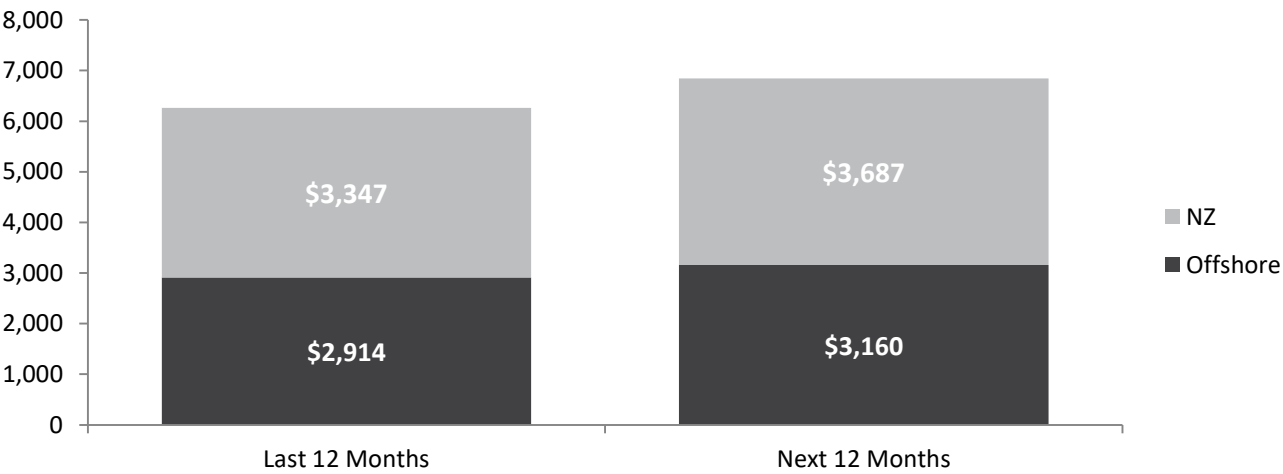
Online: New Zealand vs Off Shore

New Zealand merchants accounted for 56.3% of online spend for the month of February. This was an increase of 3.9% compared to the previous month and an increase of 15.8% compared to the previous year.

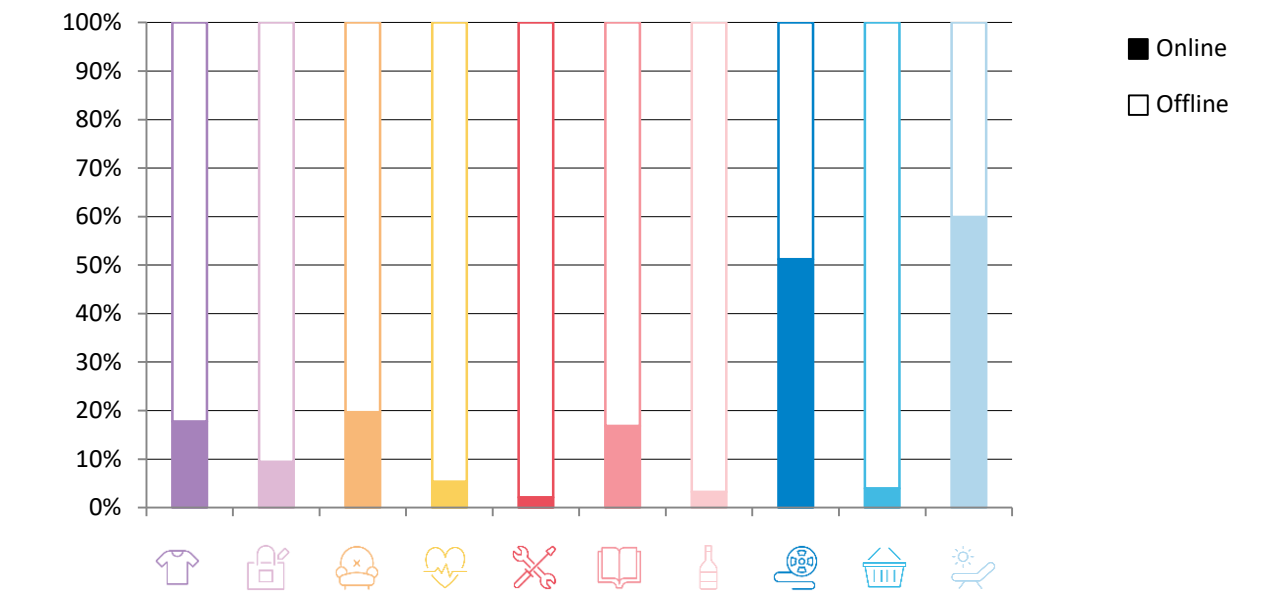
For New Zealand merchants, seven of the ten categories saw increases in spend compared to January, with the Supermarkets & Food Retailers category experiencing the greatest increase in spend, up 21.7%. The Books & Stationery Stores category had the biggest decrease in online spend, dropping 48.3%. New Zealand merchants saw increases in six categories when compared to February 2018.

Spend at offshore retail merchants decreased by 0.2% when compared to the previous month and increased 11.1% when compared to the same period last year. Offshore merchants saw spend increases in all ten categories year-on-year; the Department Stores category continues on an increasing trend, going up 277.3%.

Projected total online spend (\$M)














% share of category spend

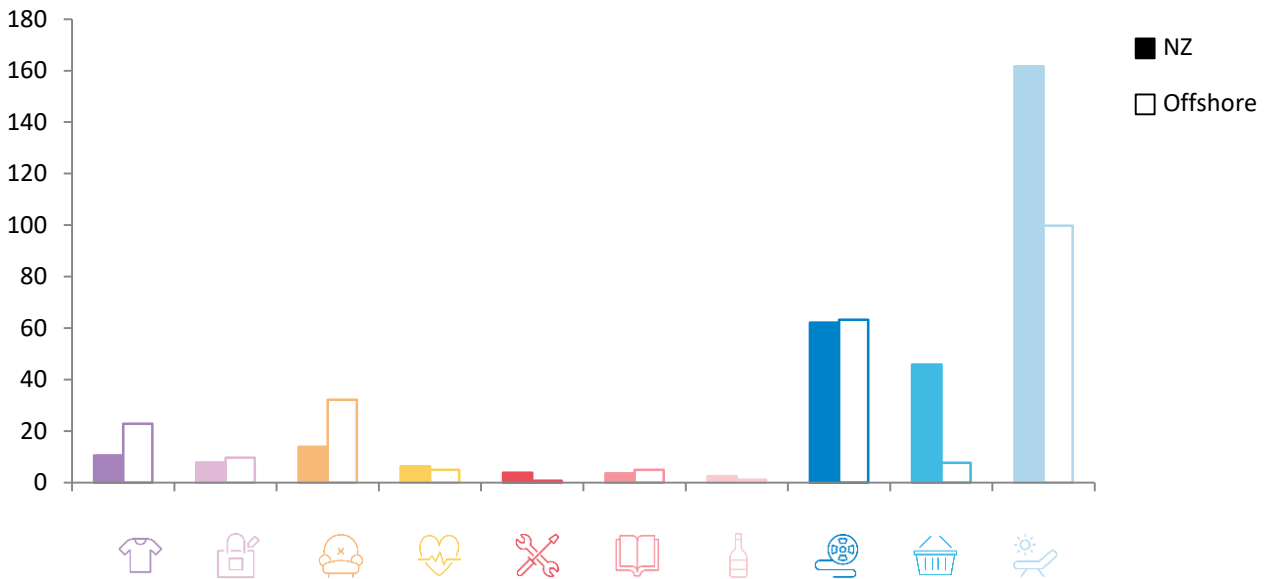


Online retail market summary New Zealand vs Offshore merchants

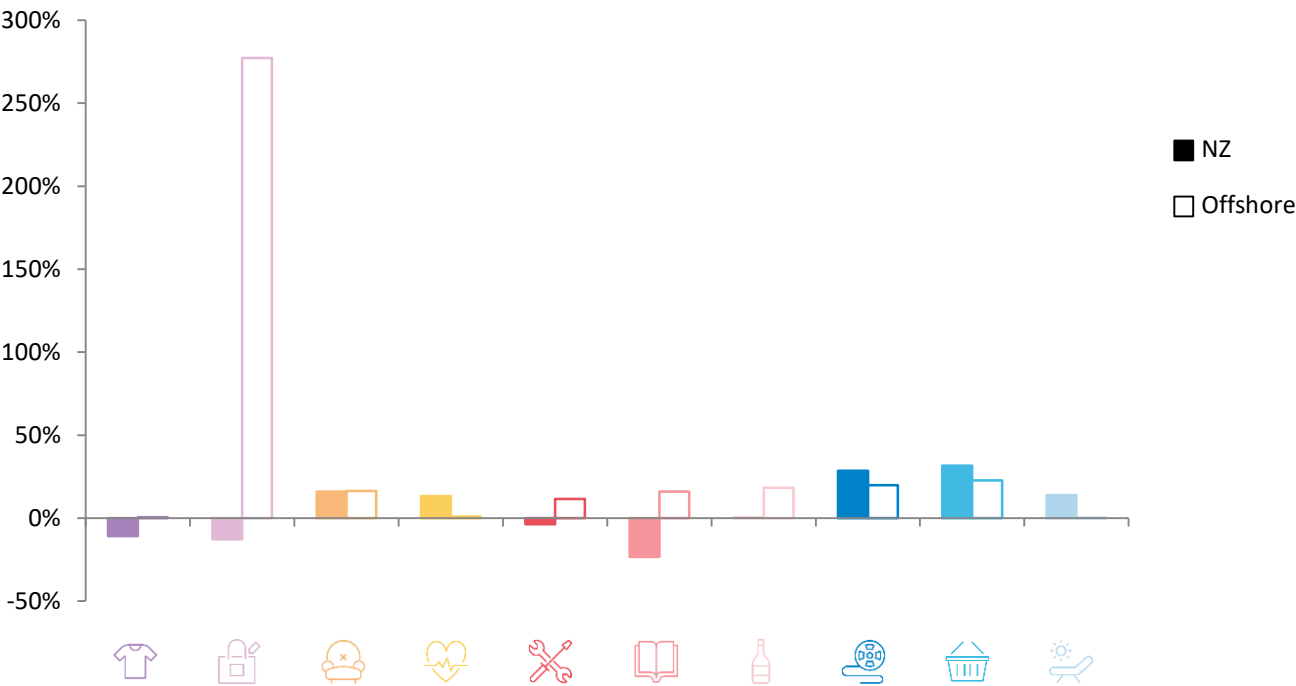
February 2018

Retailer Category	Month Total \$M		% Change vs Prior Month		% Change vs Last Year	
	NZ	Off Shore	NZ	Off Shore	NZ	Off Shore
 Clothing & Footwear	10.5	22.8	5.0%	1.6%	-10.9%	0.5%
 Department Stores	7.9	9.7	-0.6%	-4.5%	-12.9%	277.3%
 Furniture, Appliances & Electronics	13.9	32.2	12.1%	4.9%	15.9%	16.3%
 Health Goods & Services	6.4	5.0	6.4%	-0.5%	13.3%	0.9%
 Home & Building Supplies	3.8	0.8	9.7%	-5.4%	-3.8%	11.5%
 Books & Stationery Stores	3.7	4.9	-48.3%	0.5%	-23.4%	16.0%
 Liquor Stores	2.5	1.1	2.9%	35.7%	0.3%	18.2%
 Recreation & Entertainment	62.2	63.3	17.1%	1.5%	28.6%	19.8%
 Supermarkets & Food Retailers	45.8	7.7	21.7%	11.5%	31.5%	22.8%
 Travel & Accommodation	161.7	99.8	-2.8%	-3.8%	13.9%	0.2%
 Total Retail Spend	318.3	247.3	3.9%	-0.2%	15.8%	11.1%

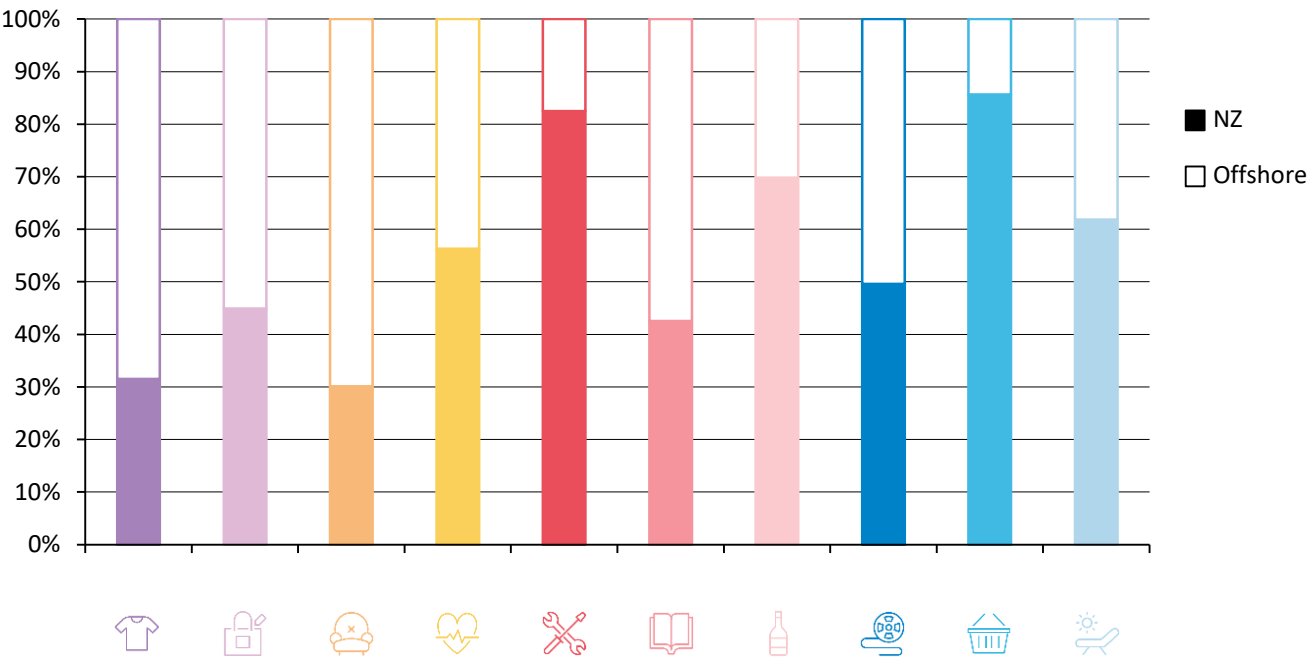
Online retailer total revenue by category (\$M)



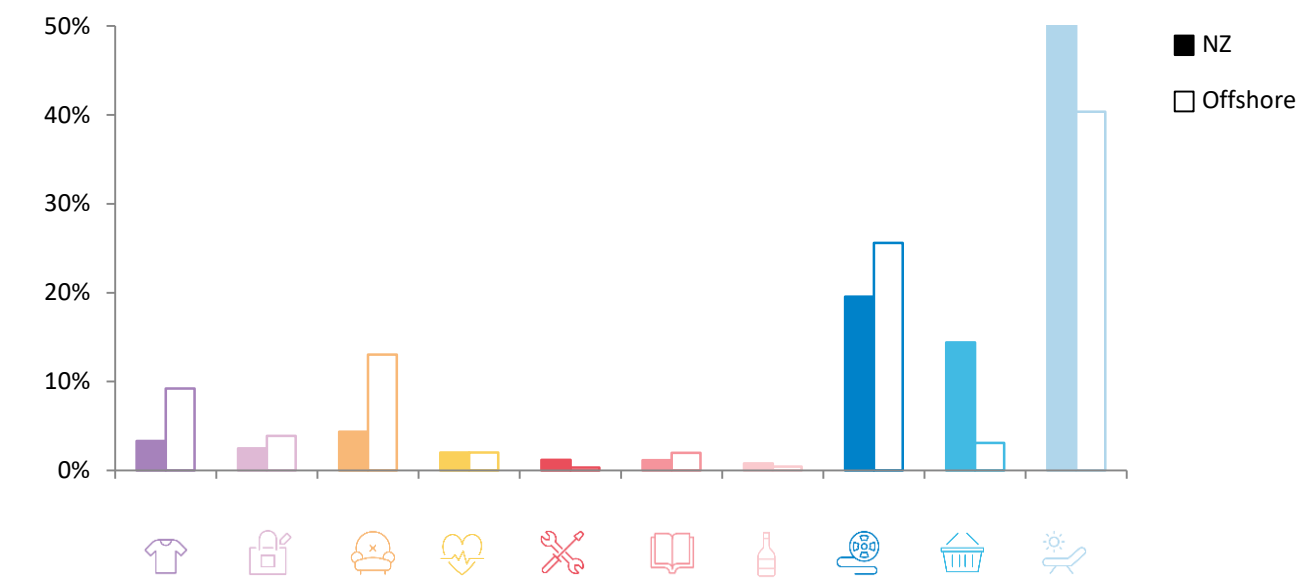
Monthly online revenue change YOY



Share of online spend within categories



Share of online spend between categories



About Retailwatch

- The online section of the report covers the online spend of our Banking and Financial client’s New Zealand customer base
- Online transactions are identified using a range of methods including whether or not a card is present for the transaction, and identification of known online merchants.
- **Stores included in online groups**
 - NZ: Air NZ, Countdown Online, Ticketmaster, My Food Bag, Ticketek, 1Day, Mighty Ape, Webjet, The Warehouse Online, NZ Sale, Farmers Online, Briscoes, Bunnings, Fishpond, Onceit
 - Off Shore: Jetstar Airways, Air BnB, Emirates, Netflix, Expedia, Virgin Australia, The Iconic, ASOS, StrawberryNet, Agoda, Boohoo, Cotton On



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