



Retailwatch














Value of electronic card transactions within retail categories

Period ending 28/03/2019

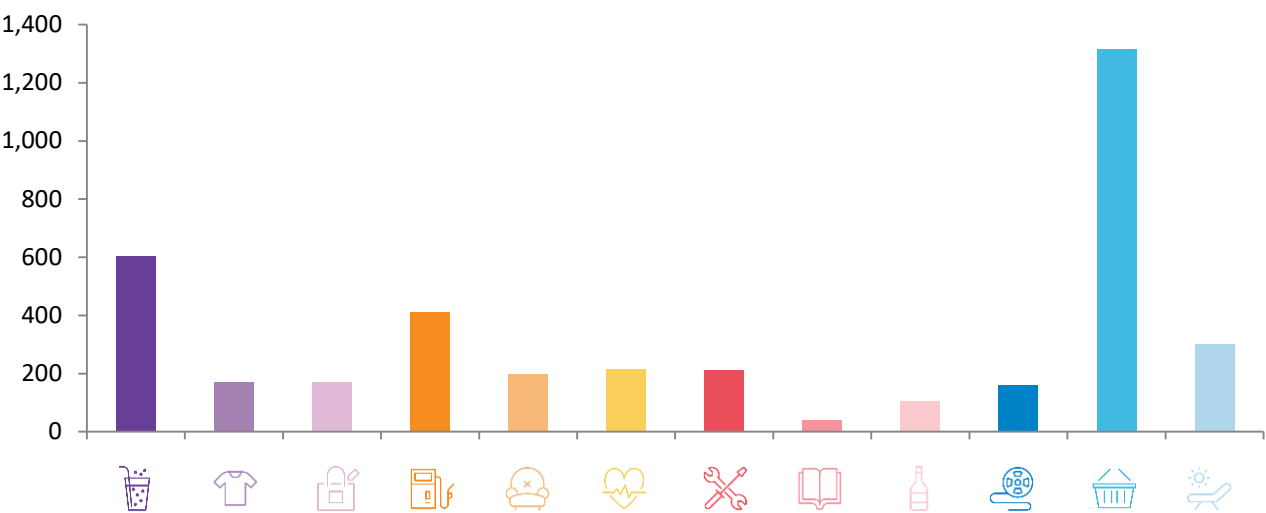
Total retail spend in New Zealand for the 28 days ending 28 March 2019 was \$3.9 billion. This was a decrease of 1.8% compared to February and no change when compared to the same period last year.

Spending was up in seven of the twelve categories year-on-year; the largest increase was in the Recreation & Entertainment category, up 8.2%. The largest decreases year-on-year were in the Clothing & Footwear and Department Stores categories, dropping 8.7% and 8.6% respectively.

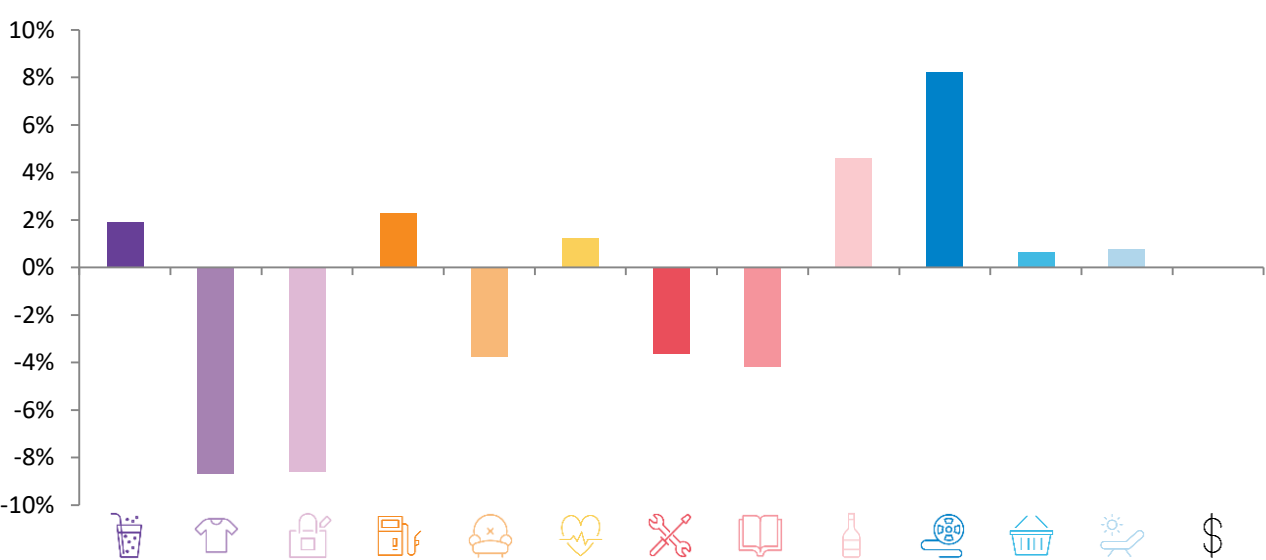
Month-on-month, three of the twelve categories experienced increases in spend. The largest of the three increases were in the Clothing & Footwear and Health Goods & Services categories, both going up 3.4%. Dropping the most this month was the Books & Stationery Stores category, down 10.9%.

Retailer Category	Month Total \$M	% Change vs Prior Month	% Change vs Last Year	% Share
 Cafés, Restaurants & Bars	602	0.7%	1.9%	15.4%
 Clothing & Footwear	170	3.4%	-8.7%	4.4%
 Department Stores	169	-3.8%	-8.6%	4.3%
 Fuel & Service Stations	413	-0.1%	2.3%	10.6%
 Furniture, Appliances & Electronics	199	-0.9%	-3.8%	5.1%
 Health Goods & Services	214	3.4%	1.2%	5.5%
 Home & Building Supplies	211	-2.4%	-3.6%	5.4%
 Books & Stationery Stores	41	-10.9%	-4.2%	1.0%
 Liquor Stores	104	-3.9%	4.6%	2.7%
 Recreation & Entertainment	160	-9.3%	8.2%	4.1%
 Supermarkets & Food Retailers	1,315	-1.3%	0.7%	33.7%
 Travel & Accommodation	301	-9.7%	0.8%	7.7%
 TOTAL RETAIL SPEND	3,899	-1.8%	0.0%	100%

Monthly retail spend by category (\$M)



Change vs last year



Quarterly summary

March 2018














The total quarterly retail spend for the 91 days ending 28 March 2019 was \$12.8 billion. This was a decrease of 8.2% when compared to the previous quarter and an increase of 2.6% when compared to the same period last year.

Just two of the twelve categories experienced increases in spend when compared to the previous quarter. These increases were seen in the Travel & Accommodation (+19.3%) and Recreation & Entertainment (+0.3%) categories. At the other end of the scale, the Department Stores category dropped the most (-33.9%).

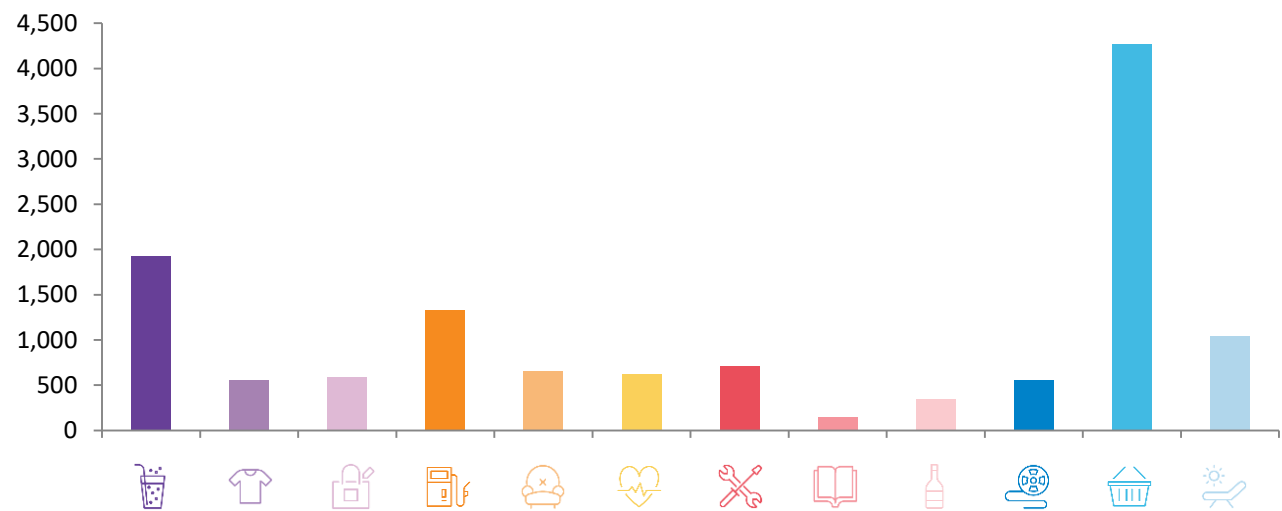
Compared to the same quarter of the previous year, eight categories experienced increases in spend. The increases and decreases mirror February's, with the Recreation & Entertainment category up 11.3% and the Books & Stationery Stores category down 4.8%.

Quarterly summary

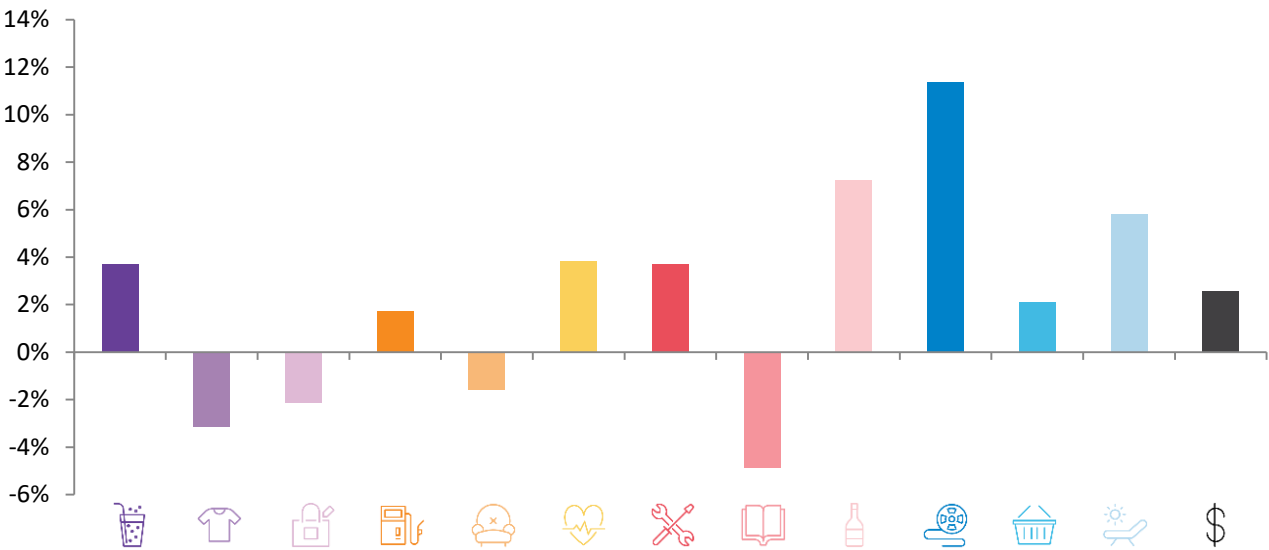
March 2019

Retailer Category	Quarter Total \$M	% Change vs Prior Quarter	% Change vs Last Year	% Share
 Cafés, Restaurants & Bars	1,921	-4.8%	3.7%	15.1%
 Clothing & Footwear	556	-22.5%	-3.1%	4.4%
 Department Stores	584	-33.9%	-2.1%	4.6%
 Fuel & Service Stations	1,329	-5.6%	1.7%	10.4%
 Furniture, Appliances & Electronics	655	-22.5%	-1.6%	5.1%
 Health Goods & Services	624	-9.5%	3.8%	4.9%
 Home & Building Supplies	712	-16.6%	3.7%	5.6%
 Books & Stationery Stores	148	-16.2%	-4.8%	1.2%
 Liquor Stores	352	-10.0%	7.2%	2.8%
 Recreation & Entertainment	557	0.3%	11.3%	4.4%
 Supermarkets & Food Retailers	4,274	-4.7%	2.1%	33.5%
 Travel & Accommodation	1,040	19.3%	5.8%	8.2%
 TOTAL RETAIL SPEND	12,752	-8.2%	2.6%	100%

Quarterly spend by category (\$M)



Change vs last year



Selected regions of interest

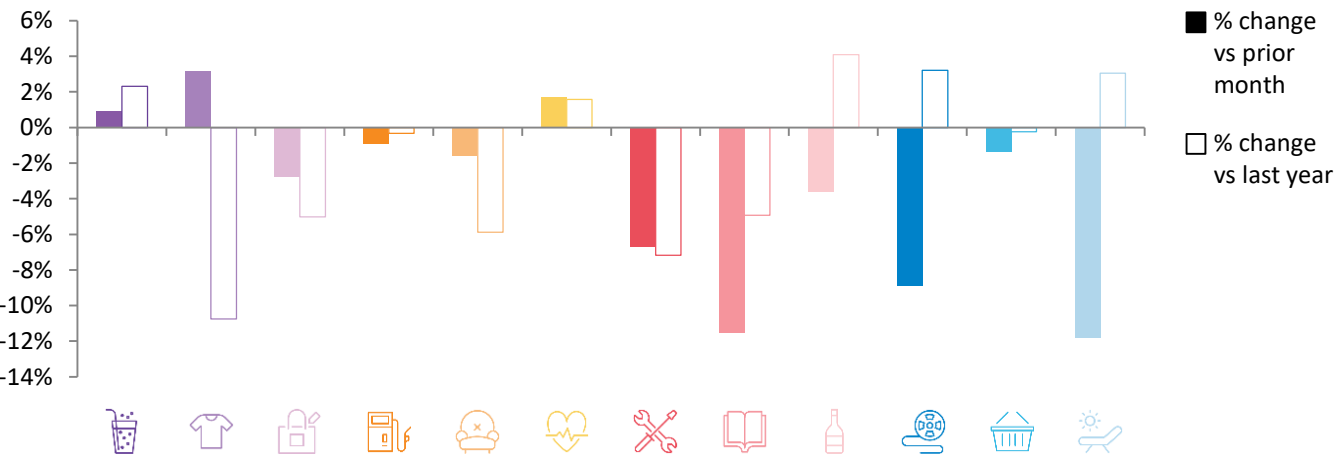
March 2019

Monthly trends for Wellington

Retail spend in the Wellington region for the 28 days ending 28 March 2019 was \$419 million. This represents a decrease in spend of 2.4% from the previous month and 0.8% year-on-year.

Retail spending in the Wellington region was up in five of the twelve categories compared to March of last year. The largest increase in year-on-year spend was seen in the Liquor Stores category (+4.1%) while the greatest decrease was in the Clothing & Footwear category (-10.8%).

Compared to February, just three of the twelve categories had an increase in spend. Going up was the Clothing & Footwear category, increasing 3.2%. Going down was the Travel & Accommodation category, decreasing 11.8%.

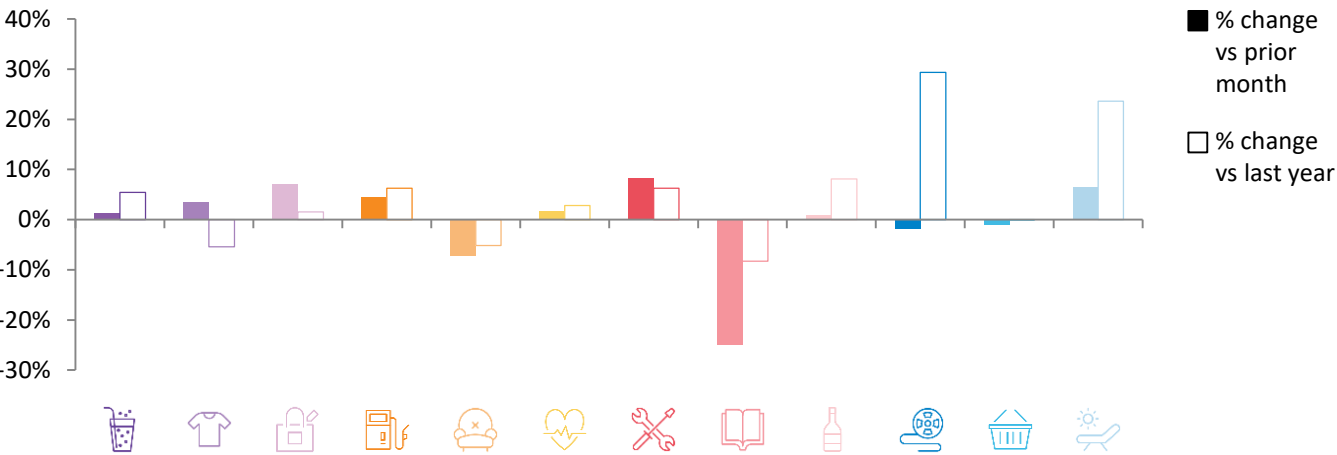


Monthly trends for Gisborne

Retail spend in the Gisborne region for the 28 days ending 28 March 2019 was \$35.5 million. This represents increases of 1.1% against the previous month and 4.2% year-on-year.

Compared to March 2018, spend was up in nine categories. The largest increase for Gisborne was in the Recreation & Entertainment category (+29.4%) and the largest drop was in the Books & Stationery Stores category (-8.3%). The Supermarkets & Food Retailers category saw no change.

Month-on-month spending was up in eight of the twelve categories. The Department Stores category had a 7.1% increase and the Books & Stationery stores category was at the other end of the scale, dropping 25%.

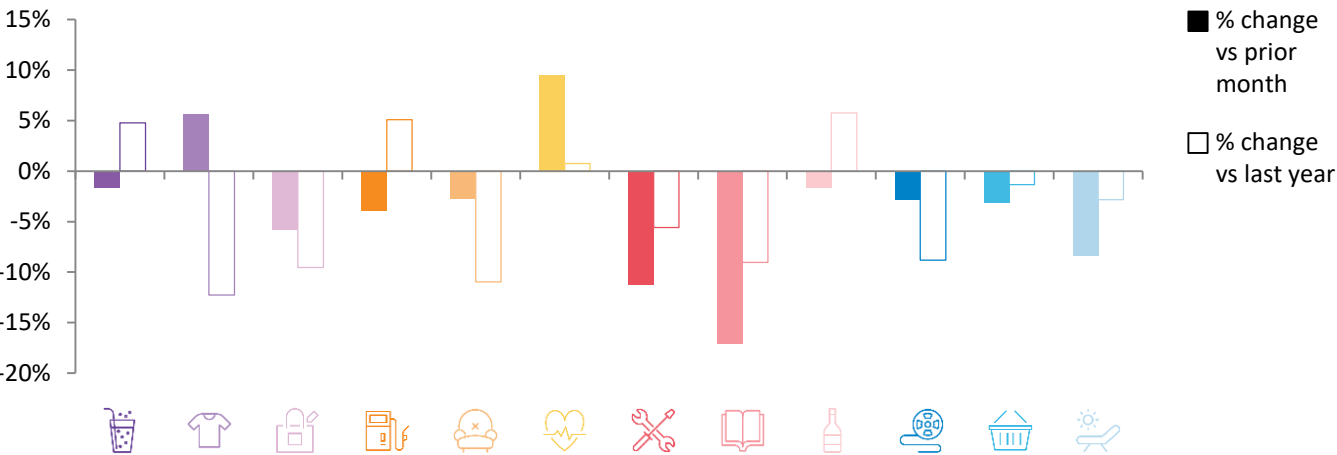


Monthly trends for Nelson

Retail spend in the Nelson region for the 28 days ending 28 March 2019 was \$39.7 million. This represents decreases of 3.2% against the previous month and 1.8% year-on-year.

Compared to March 2018, spending was up in four of the twelve categories. The Liquor Stores category increased the most (+5.8%), while the greatest drop was in the Clothing & Footwear category (-12.3%).

Month-on-month spend was up in just two categories. Going up were the Health Goods & Services (+9.5%) and Clothing & Footwear (+5.6%) categories, and going down was the Books & Stationery Stores category (-17.1%).



↑ Going up this month

The greatest increase in spending this month was shared by the Health Goods & Services and Clothing & Footwear categories, going up 3.4%.

Just two regions experienced an increase in spend this month. The Gisborne region increased the most, up 1.1%.

3

Categories up

2

Regions up

↓ Going down this month

The largest decrease in spending this month was seen in the Books & Stationery Stores category, down 10.9%.

Of the fourteen regions that were down, the West Coast region dropped the most (-3.5%).

9

Categories down

14

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 28/03/2019

Total online retail spend in New Zealand for the 28 days ending 28 March 2019 was \$529 million. This represents an increase of 4.3% year-on-year and a decrease of 5.5% from the previous month.

Online spending was up in five of the ten categories year-on-year. The Department Stores category saw the greatest increase in spend, up 47.8%. The largest decrease year-on-year was in the Clothing & Footwear category, declining 6.6%.

Month-on-month, five categories experienced increases in spend. The largest of these was the Liquor Stores category (+11.6%). Out of the decreases this month, the Recreation & Entertainment category dropped the most (-12.2%).

Online Retailer Category		Month Total \$M	% Change vs Prior Month	% Change vs Last Year	% Share
	Clothing & Footwear	35.6	7.4%	-6.6%	6.7%
	Department Stores	17.4	-0.1%	47.8%	3.3%
	Furniture, Appliances & Electronics	42.9	-6.0%	4.8%	8.1%
	Health Goods & Services	12.5	11.0%	12.1%	2.4%
	Home & Building Supplies	5.1	11.1%	-5.3%	1.0%
	Books & Stationery Stores	7.9	-6.7%	-5.1%	1.5%
	Liquor Stores	3.9	11.6%	-0.6%	0.7%
	Recreation & Entertainment	108.5	-12.2%	10.3%	20.5%
	Supermarkets & Food Retailers	54.8	3.2%	29.6%	10.4%
	Travel & Accommodation	239.9	-7.2%	-2.7%	45.4%
	Total Online Retail Spend	528.5	-5.5%	4.3%	100%

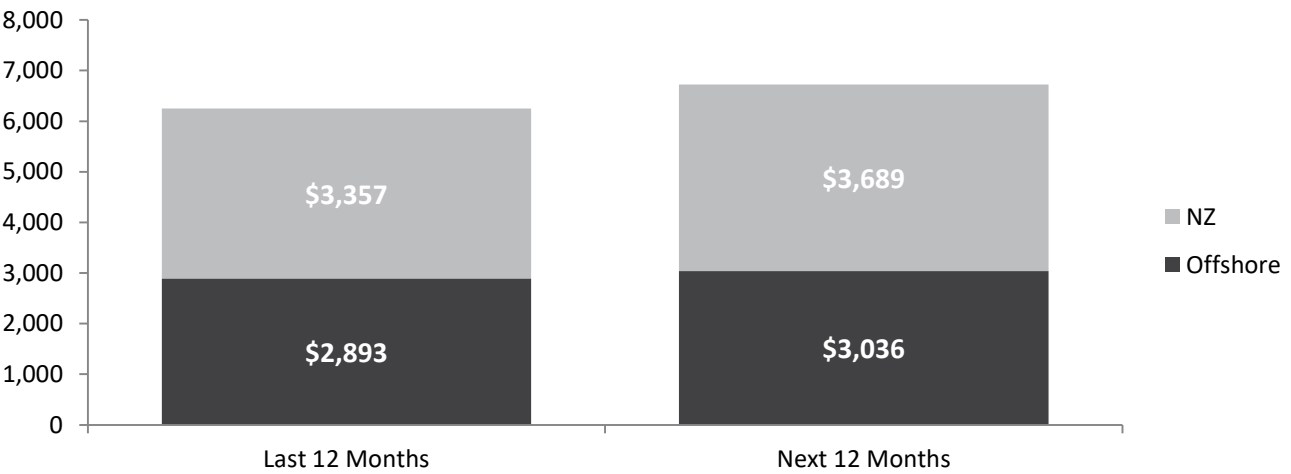
Online: New Zealand vs Offshore

New Zealand merchants accounted for 56.8% of online spend for the month of March. This was a decrease of 4.5% compared to the previous month and an increase of 10.9% compared to the previous year.

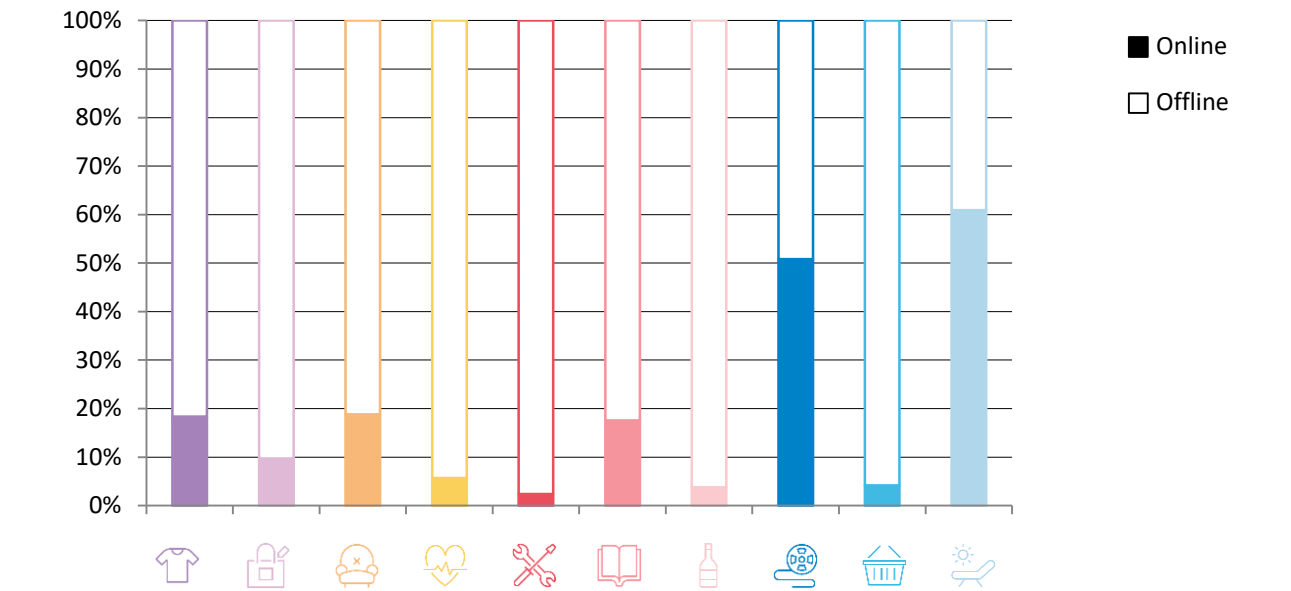
For New Zealand merchants, six of the ten categories saw increases in spend compared to February, with the Liquor Stores category experiencing the greatest increase in spend, up 21.6%. The Recreation & Entertainment category had the biggest decrease in online spend, dropping 9.4%. New Zealand merchants saw increases in five categories when compared to March 2018.

Spend at offshore retail merchants decreased by 6.8% when compared to the previous month and 3.3% when compared to the same period last year. Offshore merchants saw spend increases in six categories year-on-year; the Department Stores category continues on an increasing trend, going up a whopping 237.2%.

Projected total online spend (\$M)














% share of category spend

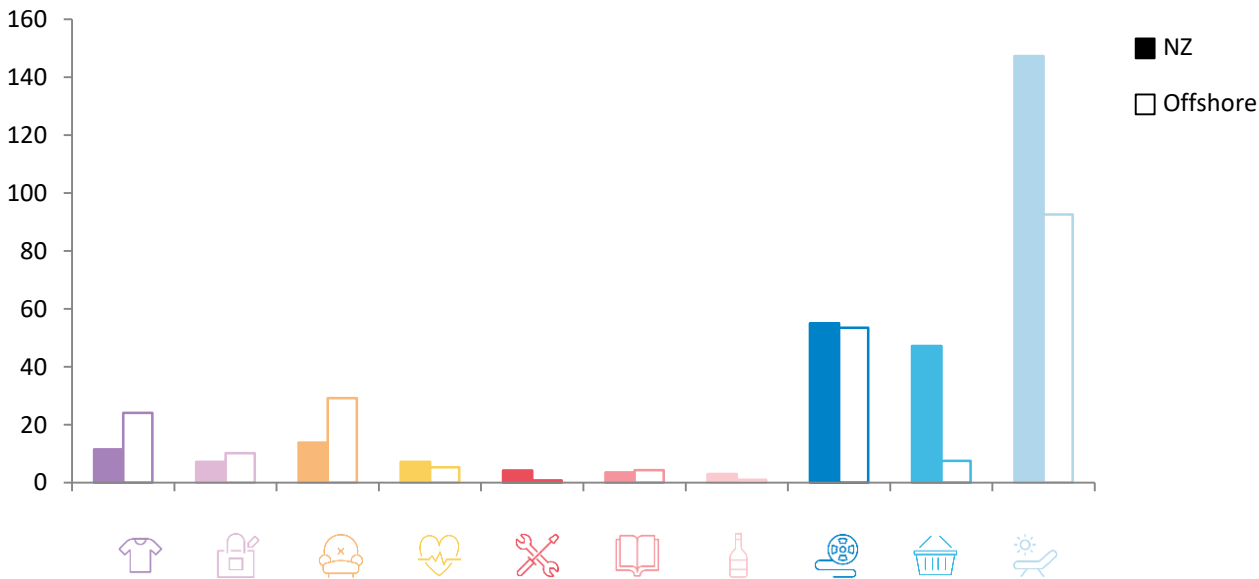


Online retail market summary New Zealand vs Offshore merchants

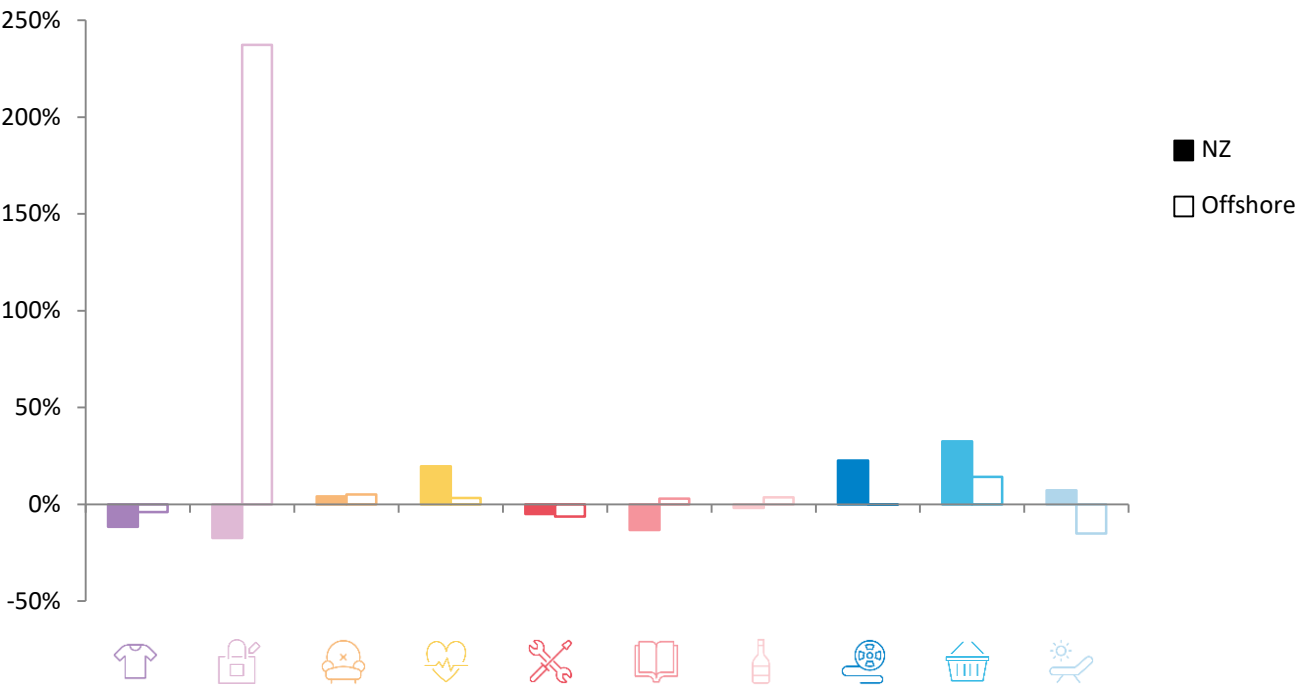
March 2018

Retailer Category	Month Total \$M		% Change vs Prior Month		% Change vs Last Year	
	NZ	Off Shore	NZ	Off Shore	NZ	Off Shore
 Clothing & Footwear	11.4	24.1	9.7%	6.4%	-11.7%	-4.0%
 Department Stores	7.2	10.2	-7.6%	5.9%	-17.4%	237.2%
 Furniture, Appliances & Electronics	13.8	29.1	0.4%	-8.8%	4.0%	5.1%
 Health Goods & Services	7.2	5.3	13.7%	7.6%	19.7%	3.2%
 Home & Building Supplies	4.2	0.8	12.9%	2.2%	-5.1%	-6.3%
 Books & Stationery Stores	3.6	4.4	-0.9%	-11.0%	-13.2%	2.9%
 Liquor Stores	3.0	0.9	21.6%	-11.3%	-1.8%	3.5%
 Recreation & Entertainment	55.0	53.5	-9.4%	-15.0%	22.6%	-0.1%
 Supermarkets & Food Retailers	47.2	7.5	3.9%	-1.2%	32.5%	14.1%
 Travel & Accommodation	147.3	92.6	-7.9%	-6.2%	7.1%	-15.1%
 Total Retail Spend	300.0	228.5	-4.5%	-6.8%	10.9%	-3.3%

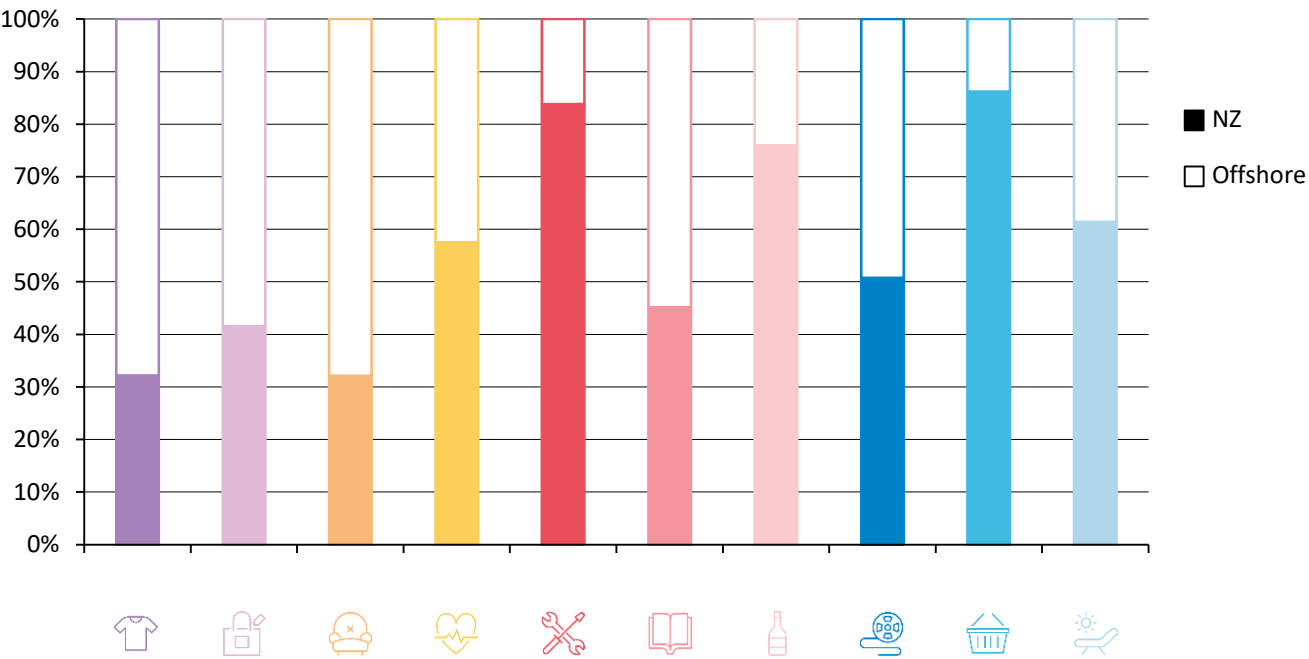
Online retailer total revenue by category (\$M)



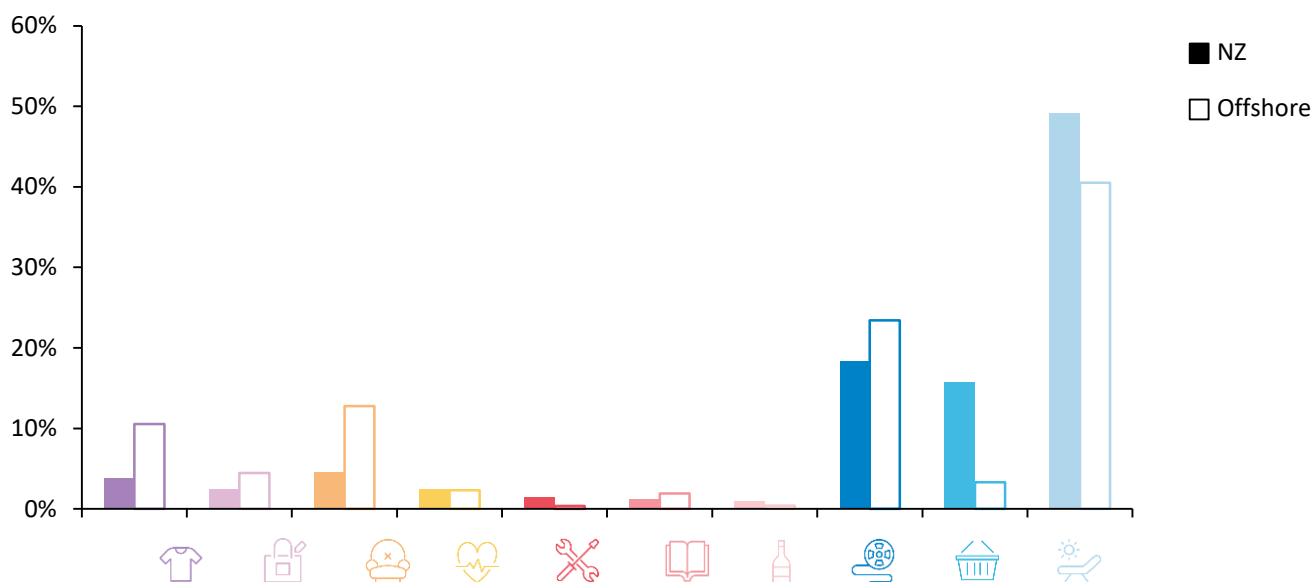
Monthly online revenue change YOY



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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