



Retailwatch














Value of electronic card transactions within retail categories

Period ending 28/11/2018

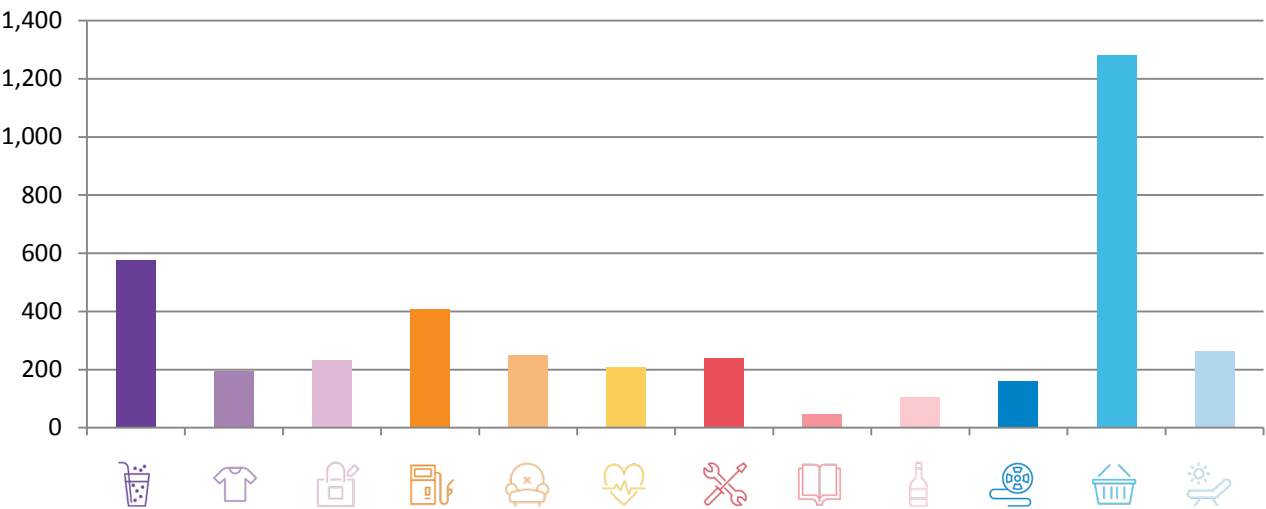
Total retail spend in New Zealand for the 28 days ending 28 November 2018 was \$4.0 billion. This was an increase of 3.2% compared to October and a decrease of 0.5% when compared to the same period last year.

Spending was up in six categories year-on-year; the Furniture, Appliances & Electronics category had the largest increase, up 6.2%, while the Fuel & Service Stations category continues to increase, but at a lower rate, up 3.3%. The largest decreases year-on-year were seen in Books & Stationery Stores (-5.7%) and Home & Building Supplies (-4.3%).

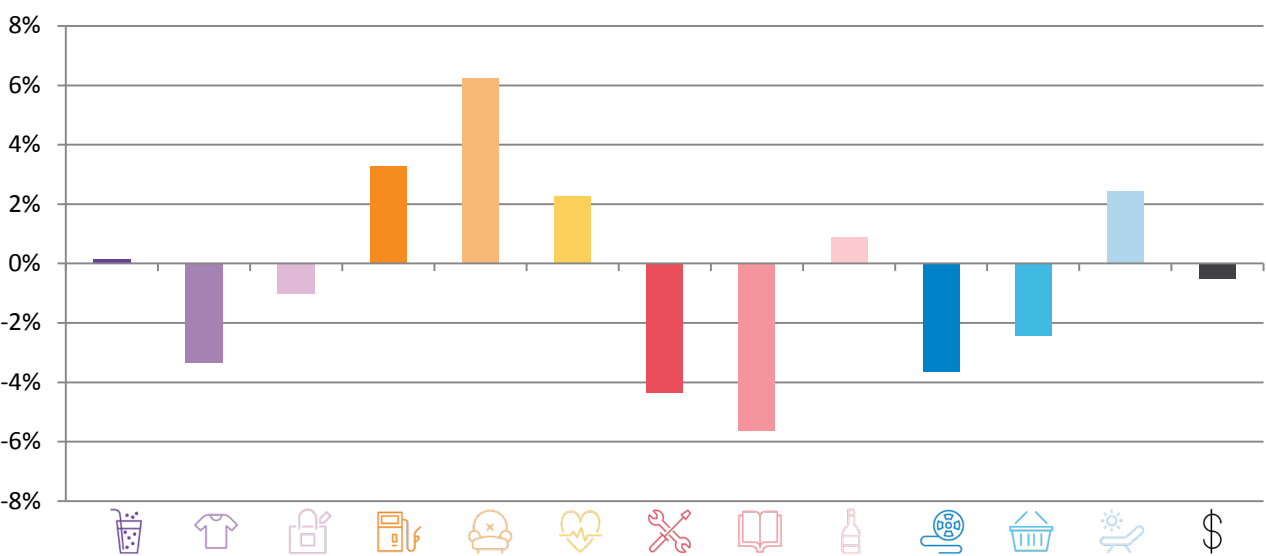
Month-on-month, eight of the twelve categories experienced increases in spend. The Department Stores category increased the most, shooting up 23.1%, with the Furniture, Appliances & Electronics category following with an increase of 21.7%. The largest decrease seen was in the Recreation & Entertainment category, down 10.8%.

Retailer Category	Month Total \$M	% Change vs Prior Month	% Change vs Last Year	% Share
 Cafés, Restaurants & Bars	574	0.6%	0.1%	14.5%
 Clothing & Footwear	196	8.3%	-3.4%	5.0%
 Department Stores	233	23.1%	-1.0%	5.9%
 Fuel & Service Stations	407	-2.3%	3.3%	10.3%
 Furniture, Appliances & Electronics	250	21.7%	6.2%	6.3%
 Health Goods & Services	210	8.5%	2.3%	5.3%
 Home & Building Supplies	238	-3.0%	-4.3%	6.0%
 Books & Stationery Stores	48	20.3%	-5.7%	1.2%
 Liquor Stores	104	4.2%	0.9%	2.6%
 Recreation & Entertainment	158	-10.8%	-3.6%	4.0%
 Supermarkets & Food Retailers	1,281	1.9%	-2.4%	32.3%
 Travel & Accommodation	264	-0.6%	2.4%	6.7%
 TOTAL RETAIL SPEND	3,962	3.2%	-0.5%	100%

Monthly retail spend by category (\$M)



Change vs last year



Quarterly summary

November 2018














The total quarterly retail spend for the 91 days ending 28 November 2018 was \$12.5 billion. This was an increase of 4.6% when compared to the previous quarter and an increase of 0.5% when compared to the same period last year.

All twelve categories experienced increases in spend when compared to the previous quarter. The largest of these increases was seen, once again, in the Home & Building Supplies category, up 22.2%. The Department Stores category came in second, with an increase of 9.6%.

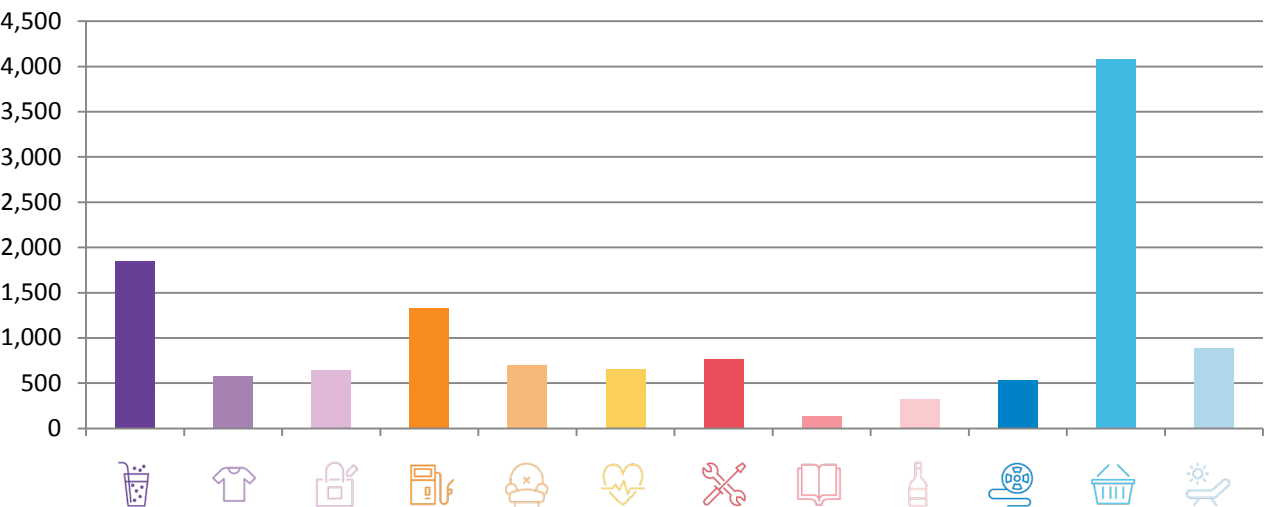
Compared to the same quarter of the previous year, spending increased in six of the twelve categories. The Fuel & Service Station category continues to increase, up 9.6%, while the Books & Stationery Stores category continues to decline, down 5.5%.

Quarterly summary

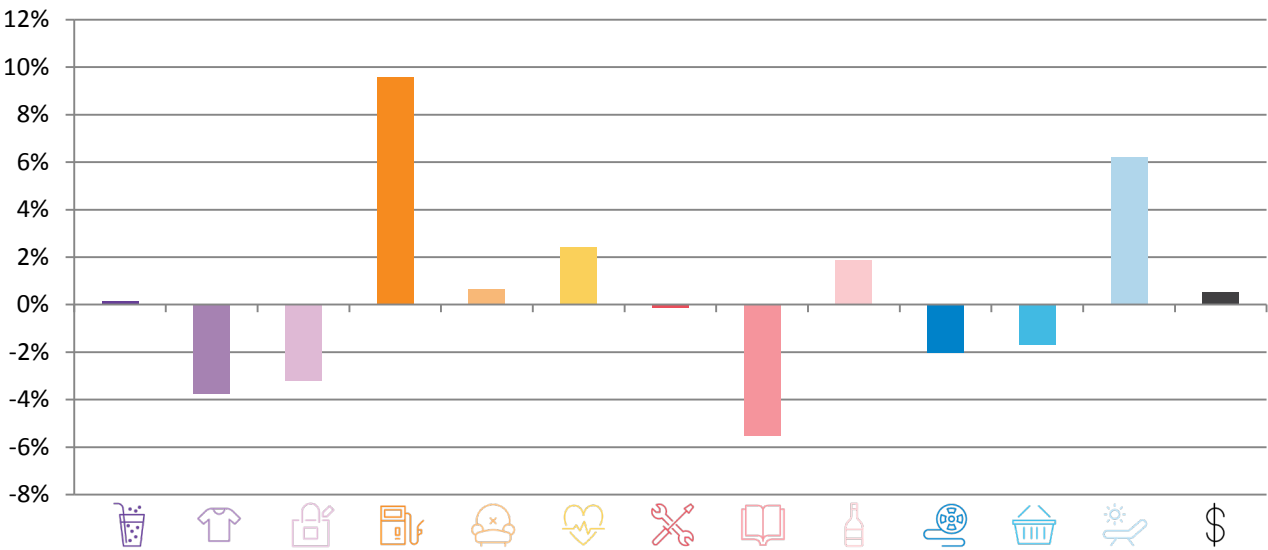
November 2018

Retailer Category	Quarter Total \$M	% Change vs Prior Quarter	% Change vs Last Year	% Share
 Cafés, Restaurants & Bars	1,851	0.8%	0.2%	14.8%
 Clothing & Footwear	584	2.9%	-3.8%	4.7%
 Department Stores	643	9.6%	-3.2%	5.1%
 Fuel & Service Stations	1,330	5.2%	9.6%	10.6%
 Furniture, Appliances & Electronics	698	8.0%	0.7%	5.6%
 Health Goods & Services	656	0.1%	2.4%	5.3%
 Home & Building Supplies	769	22.2%	-0.1%	6.2%
 Books & Stationery Stores	138	2.7%	-5.5%	1.1%
 Liquor Stores	319	8.7%	1.9%	2.6%
 Recreation & Entertainment	531	3.5%	-2.0%	4.3%
 Supermarkets & Food Retailers	4,082	3.4%	-1.7%	32.7%
 Travel & Accommodation	889	2.8%	6.2%	7.1%
 TOTAL RETAIL SPEND	12,488	4.6%	0.5%	100%

Quarterly spend by category (\$M)



Change vs last year



Selected regions of interest

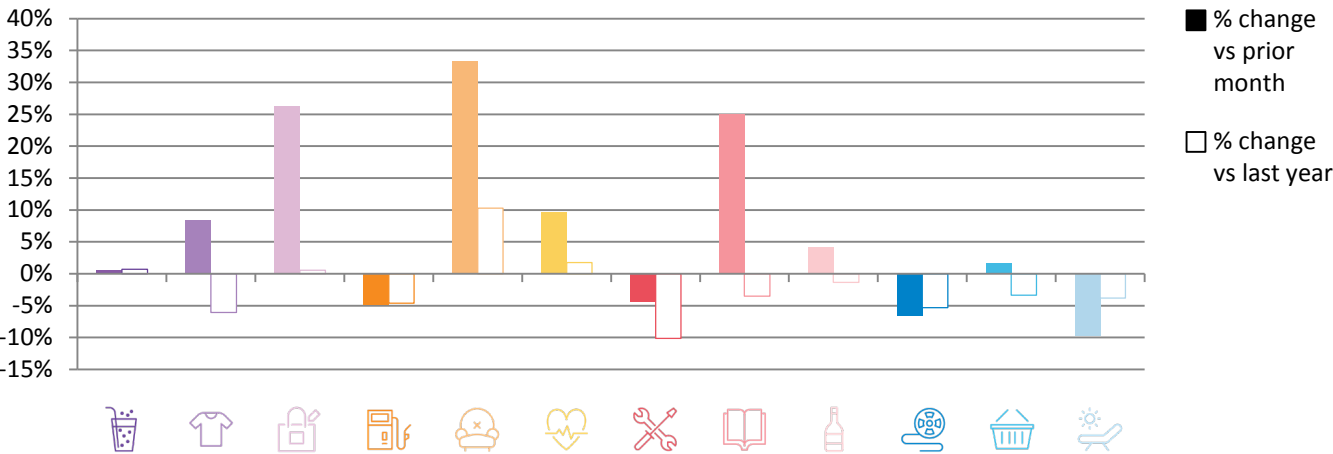
November 2018

Monthly trends for Canterbury

Retail spend in the Canterbury region for the 28 days ending 28 November 2018 was \$492.6 million. This represents increases in spend of 3.2% from the previous month and a decrease of 2.3% year-on-year.

Retail spending in the Canterbury region was up in just four categories compared to November of last year. The greatest increase in year-on-year spend was seen in the Furniture, Appliances & Electronics category, up 10.3%, while the Home & Building Supplies category had the largest decline, down 10.1%.

Compared to October, eight of the twelve categories experienced an increase in spend. Three categories saw large increases; Furniture, Appliances & Electronics (+33.3%), Department Stores (+26.3%) and Books & Stationery Stores (+25.1%). The greatest decrease was in the Travel & Accommodation category, down 9.8%.

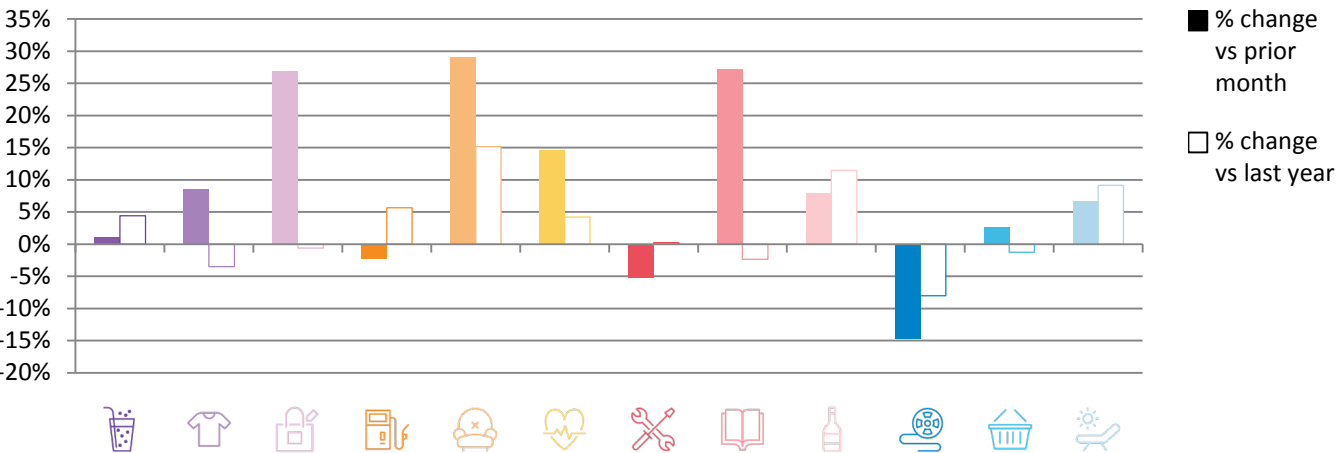


Monthly trends Hawke’s Bay

Retail spend in the Hawke’s Bay region for the 28 days ending 28 November 2018 was \$124.8 million. This represents an increase of 4.7% against the previous month and an increase of 2.0% year-on-year.

Compared to November 2017, spending was up in seven of the twelve categories, with a 15.2% increase in the Furniture, Appliances & Electronics category and an 11.5% increase in the Liquor Stores category. The Recreation & Entertainment category had the greatest decrease in spend when compared to last year, dropping 8.0%.

Month-on-month spend was up in nine categories. Like Canterbury, the largest increases for Hawke’s Bay were seen in Furniture, Appliances & Electronics (+29.1%), Department Stores (+26.9%) and Books & Stationery Stores (+27.1%). The greatest drop in spending was in the Recreation & Entertainment category, decreasing by 14.7%.

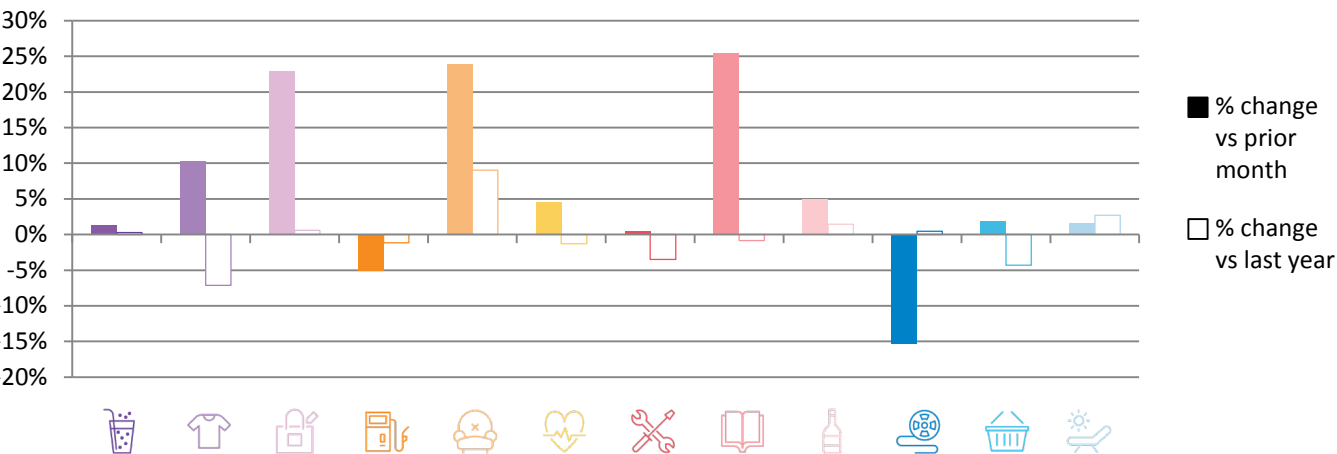


Monthly trends Wellington

Retail spend in the Wellington region for the 28 days ending 28 November 2018 was \$426.3 million. This represents an increase of 3.3% against the previous month and a decrease of 1.4% year-on-year.

Retail spending in the Wellington region increased in six of the twelve categories year-on-year. The Furniture, Appliances & Electronics category saw the greatest increase in spend, going up 9.0%. The largest decrease in spend was in the Clothing & Footwear category, down 7.1%.

Compared to October, ten categories experienced increases in spend. Just like Canterbury and Hawke’s Bay, the greatest increases were seen in the same 3 categories: Furniture, Appliances & Electronics (+24.0%), Department Stores (+22.9%) and Books & Stationery Stores (+25.4%).



Going up this month

The greatest increase in spending this month was seen in the Department Stores category, up 23.1%.

The West Coast region experienced the greatest increase in spend this month, up 4.9% from October 2018.

8

Categories up

16

Regions up

Going down this month

The largest decrease in spending this month was seen in the Recreation & Entertainment category, down 10.8%.

None of the 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



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Online Retailwatch












Online retail market summary

Period ending 28/11/2018

Total online retail spend in New Zealand for the 28 days ending 28 November 2018 was \$508.2 million. This represents an increase of 2.3% year-on-year and a decrease of 0.5% from the previous month.

Online spending was up in seven of the ten categories year-on-year. Home & Building Supplies saw the greatest increase in spending for the sixth month in a row, up 55.2%. The Department Stores and Supermarkets & Food Retailers categories also continue to increase, up 48.9% and 19.3% respectively.

Month-on-month, eight of the ten categories experienced increases in spend. The largest increase in spend was in the Department Stores category, up 64.3%, while the largest drop in month-on-month spend was in the Recreation & Entertainment category, down 20.0%.

Online Retailer Category		Month Total \$M	% Change vs Prior Month	% Change vs Last Year	% Share
	Clothing & Footwear	47.8	33.0%	7.3%	9.4%
	Department Stores	25.6	64.3%	48.9%	5.0%
	Furniture, Appliances & Electronics	47.8	21.7%	15.2%	9.4%
	Health Goods & Services	10.6	2.7%	6.5%	2.1%
	Home & Building Supplies	7.5	7.1%	55.2%	1.5%
	Books & Stationery Stores	10.5	29.4%	-11.7%	2.1%
	Liquor Stores	4.6	46.2%	7.3%	0.9%
	Recreation & Entertainment	95.5	-20.0%	-7.3%	18.8%
	Supermarkets & Food Retailers	51.4	4.7%	19.3%	10.1%
	Travel & Accommodation	206.8	-7.2%	-4.3%	40.7%
	Total Online Retail Spend	508.2	-0.5%	2.3%	100%

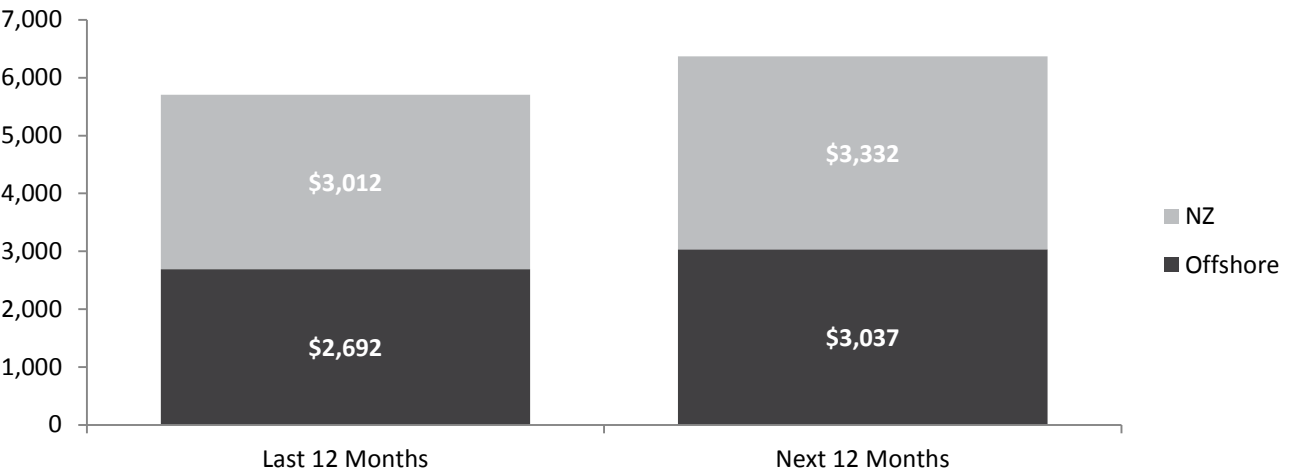
Online: New Zealand vs Offshore

New Zealand merchants accounted for 56.8% of online spend for the month of November. This was an increase of 6.2% compared to the previous month and an increase of 8.2% compared to the previous year.

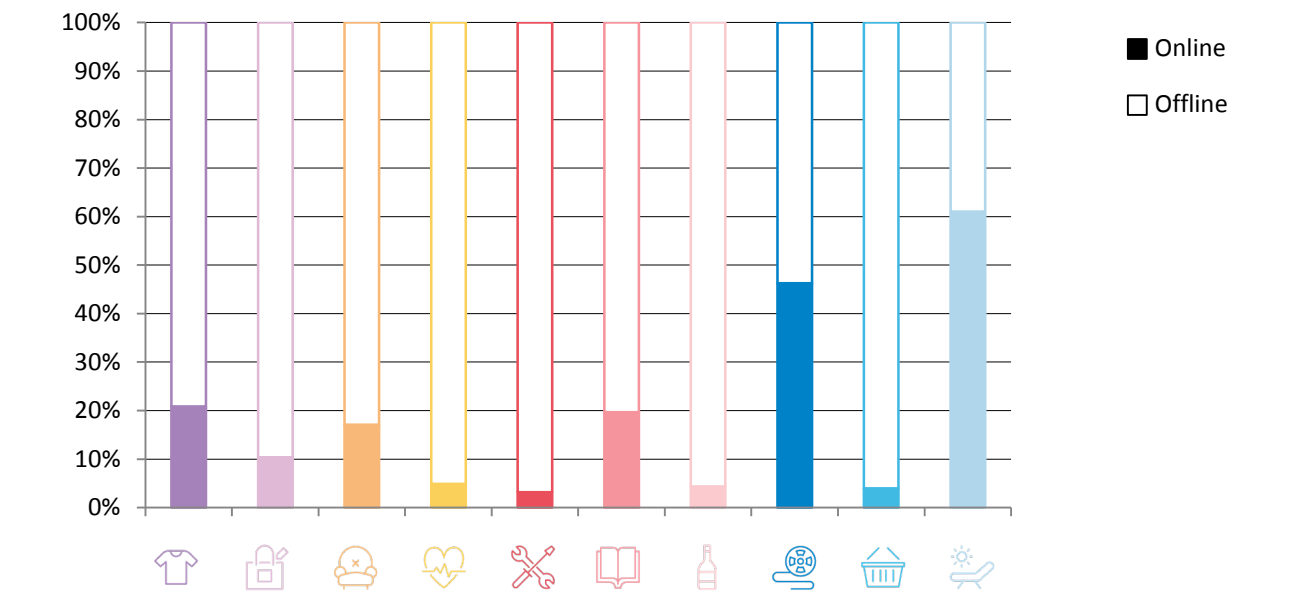
For New Zealand merchants, nine of the ten categories saw increases in spend compared to October, with the Department Stores category experiencing the greatest increase in spend, up 68.4%. The Recreation & Entertainment category saw the only decrease in online spend, dropping 14.5%. New Zealand merchants saw increases in six categories when compared to November 2017.

Spend at offshore retail merchants decreased by 8.2% when compared to the previous month and 4.5% when compared to the same period last year. Offshore merchants saw spend increases in six categories year-on-year; the Department Stores category continues to increase, up a huge 259.6%, while the greatest decrease was seen in the Supermarkets & Food Retailers category, down 23.9%.

Projected total online spend (\$M)














% share of category spend

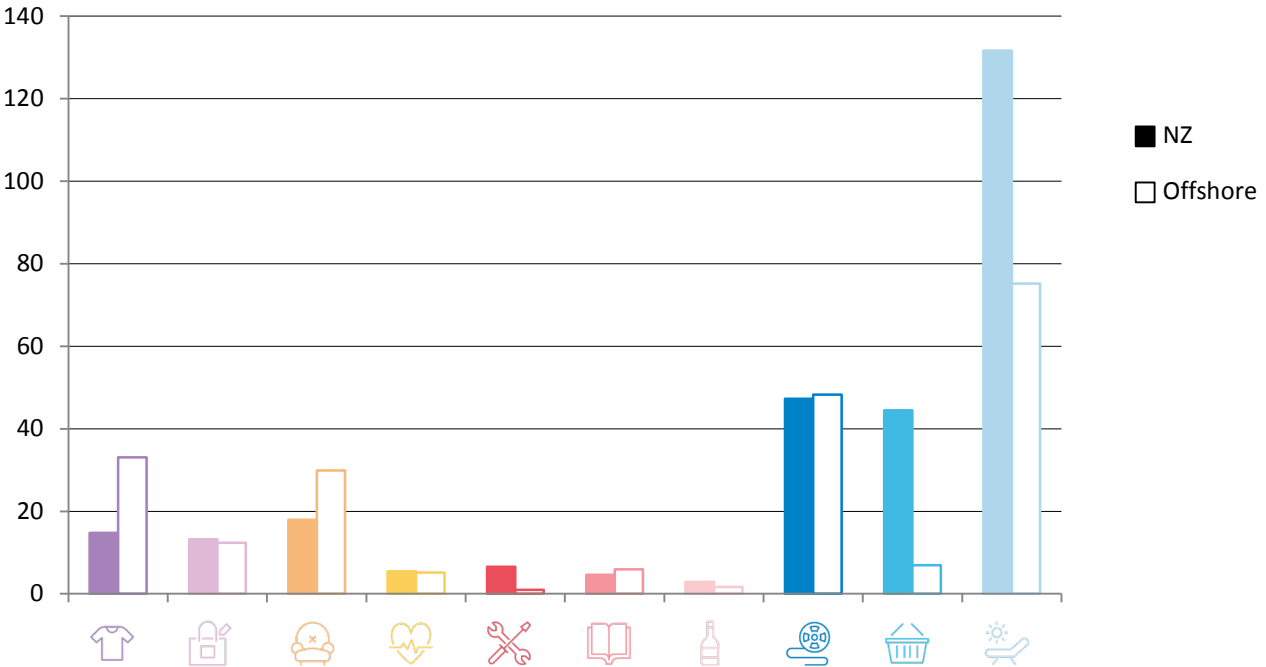


Online retail market summary New Zealand vs Offshore merchants

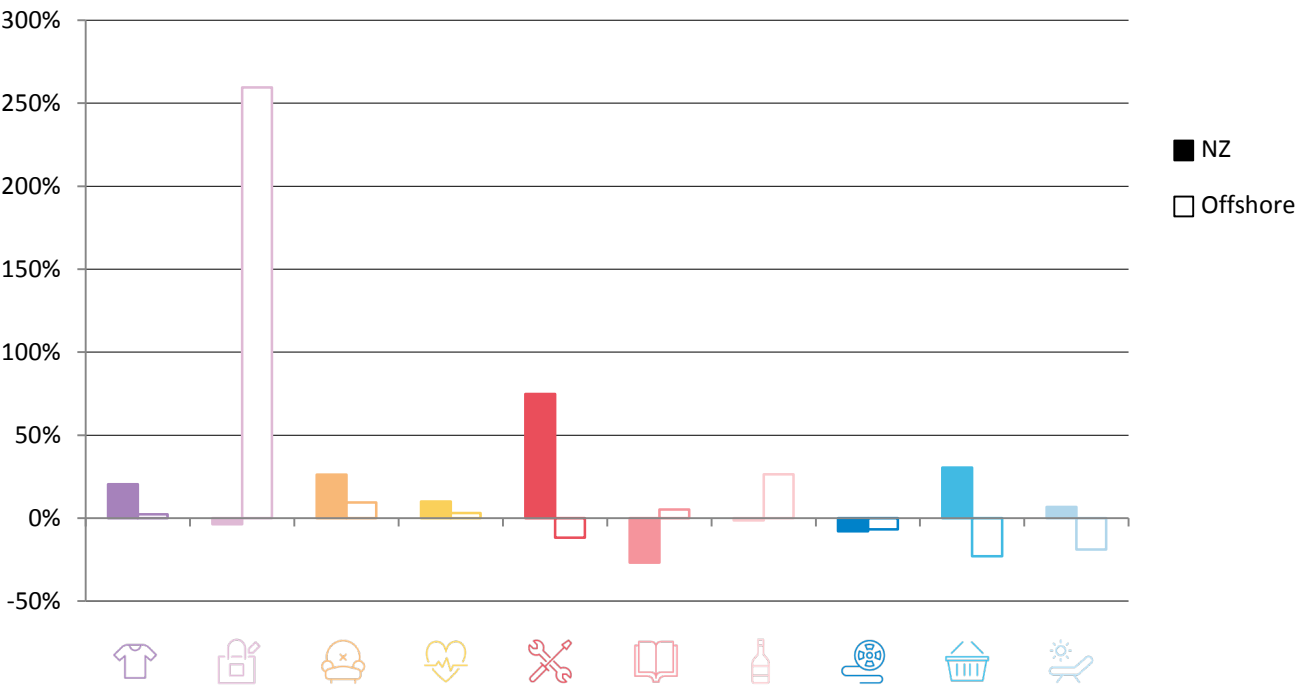
November 2018

Retailer Category	Month Total \$M		% Change vs Prior Month		% Change vs Last Year	
	NZ	Offshore	NZ	Offshore	NZ	Offshore
 Clothing & Footwear	14.8	33.1	43.3%	28.8%	20.4%	2.4%
 Department Stores	13.2	12.3	68.4%	60.1%	-3.7%	259.6%
 Furniture, Appliances & Electronics	18.0	29.9	49.7%	9.4%	26.2%	9.5%
 Health Goods & Services	5.5	5.1	18.8%	-10.2%	10.0%	3.0%
 Home & Building Supplies	6.6	1.0	6.4%	12.3%	74.8%	-11.9%
 Books & Stationery Stores	4.6	5.9	22.8%	35.1%	-26.8%	5.2%
 Liquor Stores	2.9	1.7	38.1%	62.5%	-1.3%	26.4%
 Recreation & Entertainment	47.2	48.3	-14.5%	-24.7%	-7.9%	-6.7%
 Supermarkets & Food Retailers	44.5	6.9	4.4%	6.5%	30.4%	-23.0%
 Travel & Accommodation	131.6	75.2	3.4%	-21.4%	6.7%	-19.0%
 Total Retail Spend	288.8	219.4	6.2%	-8.2%	8.2%	-4.5%

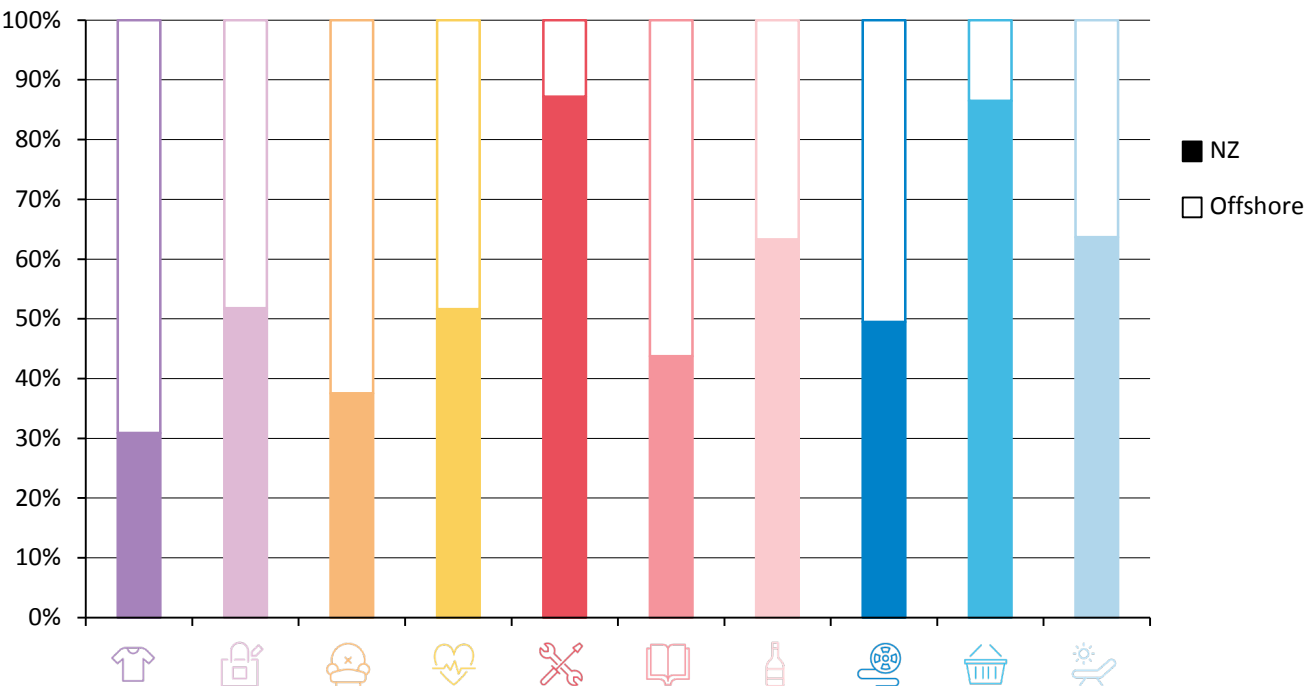
Online retailer total revenue by category (\$M)



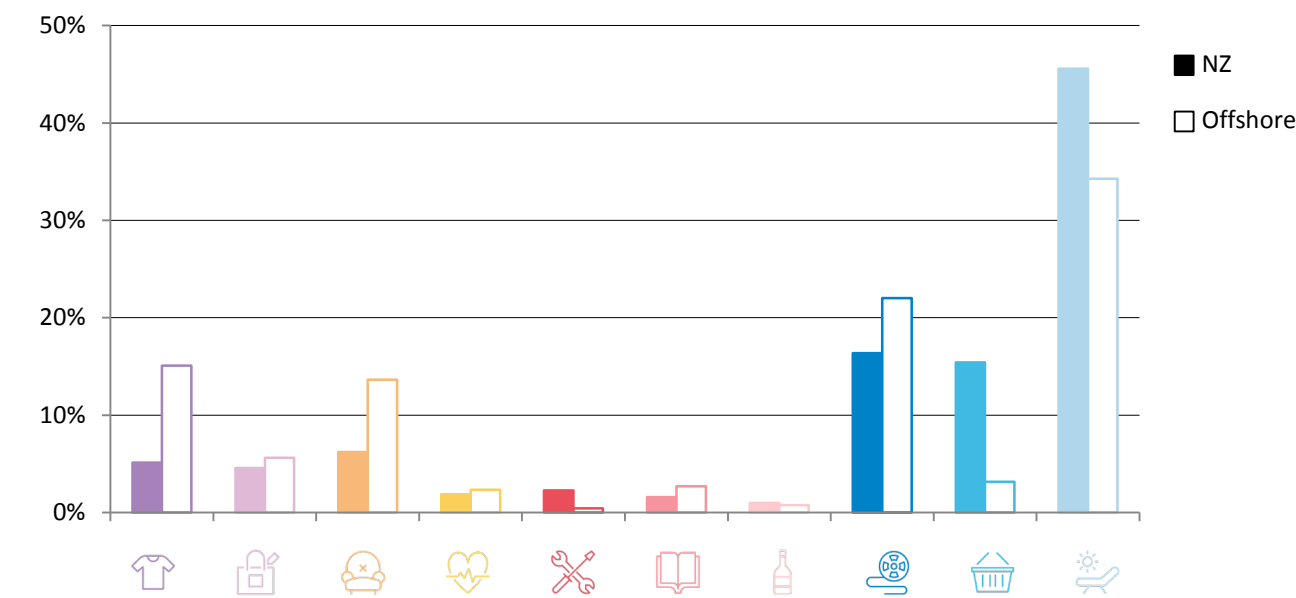
Monthly online revenue change year-on-year



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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