



# Retailwatch














## Value of electronic card transactions within retail categories

Period ending 28/10/2018

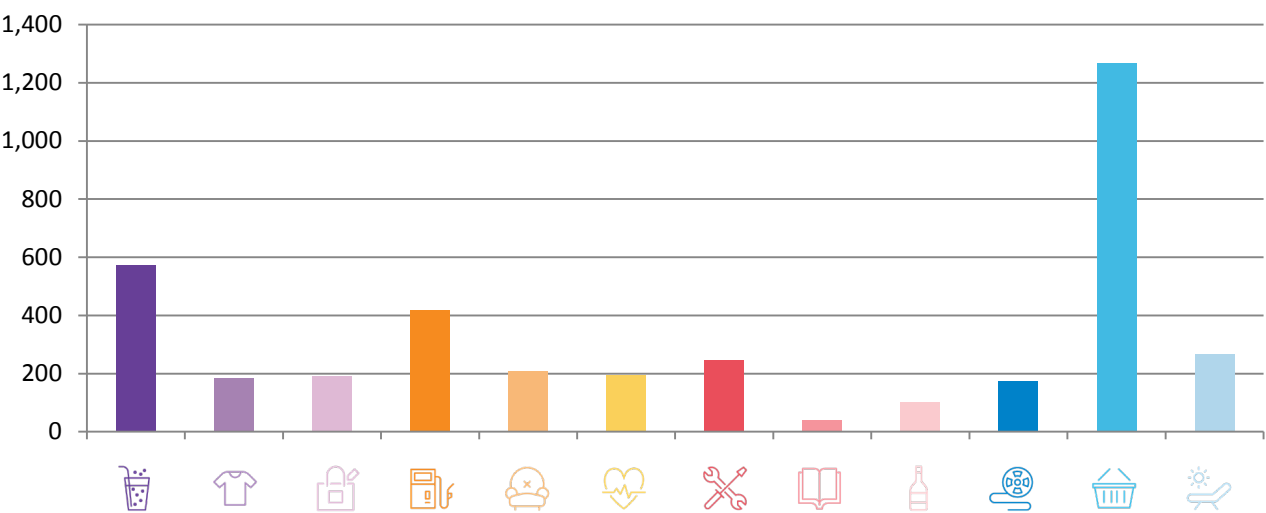
Total retail spend in New Zealand for the 28 days ending 28 October 2018 was \$3.9 billion. This was an increase of 3.8% compared to September and an increase of 1.6% when compared to the same period last year.

Spending was up in six categories year-on-year; the Fuel & Service Stations category continues to have the greatest increase, up 13.5%. This increase is followed by the Travel & Accommodation category, up 6.8%. The largest decreases year-on-year were seen in Books & Stationery Stores (-6.0%) and Department Stores (-4.3%).

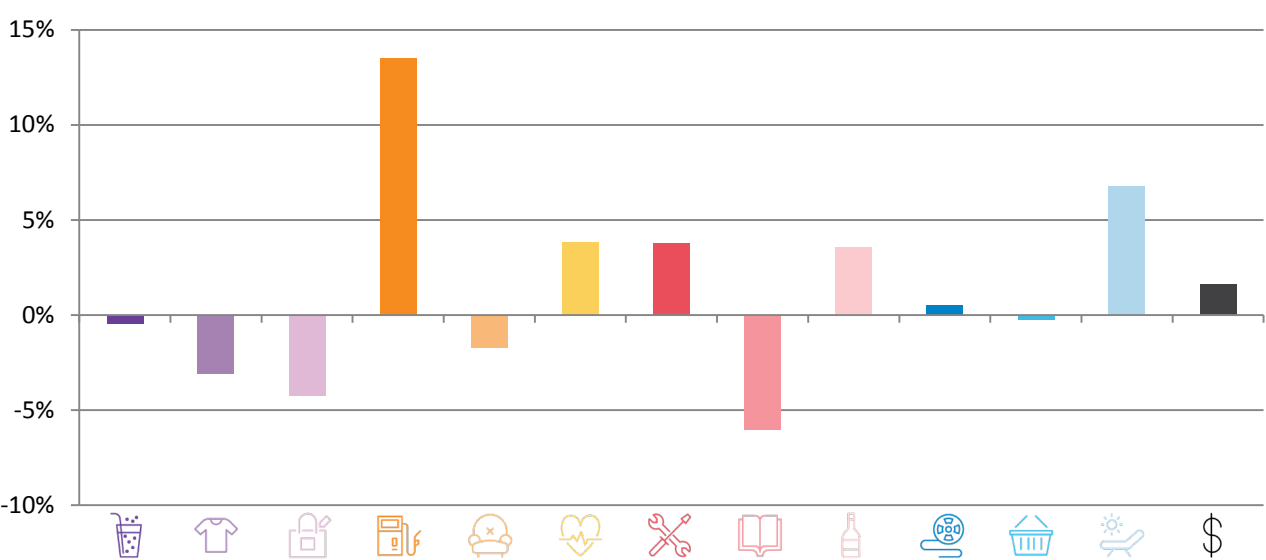
Month-on-month, nine of the twelve categories experienced increases in spend. The Recreation & Entertainment category increased the most, up 17.4%, with the Home & Building Supplies category following, increasing by 11.7%. The largest decrease seen this month was in the Travel & Accommodation category, down 5.6%.

Retailer Category	Month Total \$M	% Change vs Prior Month	% Change vs Last Year	% Share
 Cafés, Restaurants & Bars	573	1.4%	-0.5%	14.8%
 Clothing & Footwear	183	10.3%	-3.1%	4.7%
 Department Stores	191	10.1%	-4.3%	5.0%
 Fuel & Service Stations	419	3.9%	13.5%	10.8%
 Furniture, Appliances & Electronics	208	7.9%	-1.7%	5.4%
 Health Goods & Services	195	-3.8%	3.8%	5.0%
 Home & Building Supplies	247	11.7%	3.8%	6.4%
 Books & Stationery Stores	40	-1.2%	-6.0%	1.0%
 Liquor Stores	100	8.5%	3.5%	2.6%
 Recreation & Entertainment	173	17.4%	0.5%	4.5%
 Supermarkets & Food Retailers	1,266	2.7%	-0.2%	32.8%
 Travel & Accommodation	267	-5.6%	6.8%	6.9%
 <b>TOTAL RETAIL SPEND</b>	<b>3,862</b>	<b>3.8%</b>	<b>1.6%</b>	<b>100%</b>

## Monthly retail spend by category (\$M)



## Change vs last year



## Quarterly summary

### October 2018














The total quarterly retail spend for the 91 days ending 28 October 2018 was \$12.1 billion. This was an increase of 0.8% when compared to the previous quarter and an increase of 1.3% when compared to the same period last year.

Six of the twelve categories experienced increases in spend when compared to the previous quarter. The largest increase was seen in the Home & Building Supplies category, up 14.4%. The Clothing & Footwear category continues its decreasing trend, down 9.7%.

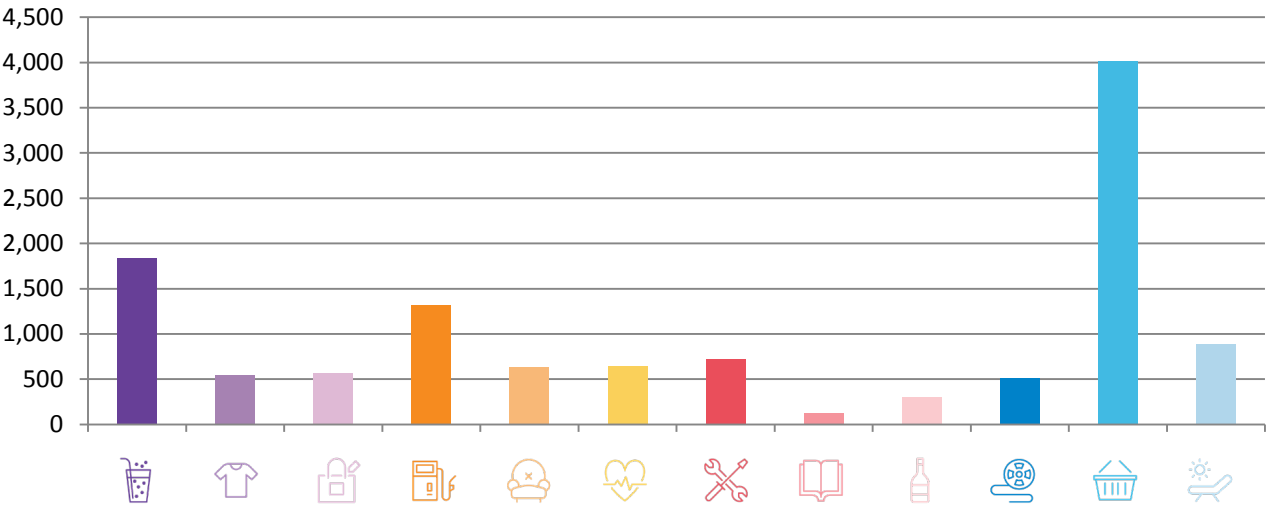
Compared to the same quarter of the previous year, spending increased in seven of the twelve categories. The Fuel & Service Station category continues to increase, up 12.2%, while Books & Stationery Stores experienced the greatest decline, down 5.4%.

# Quarterly summary

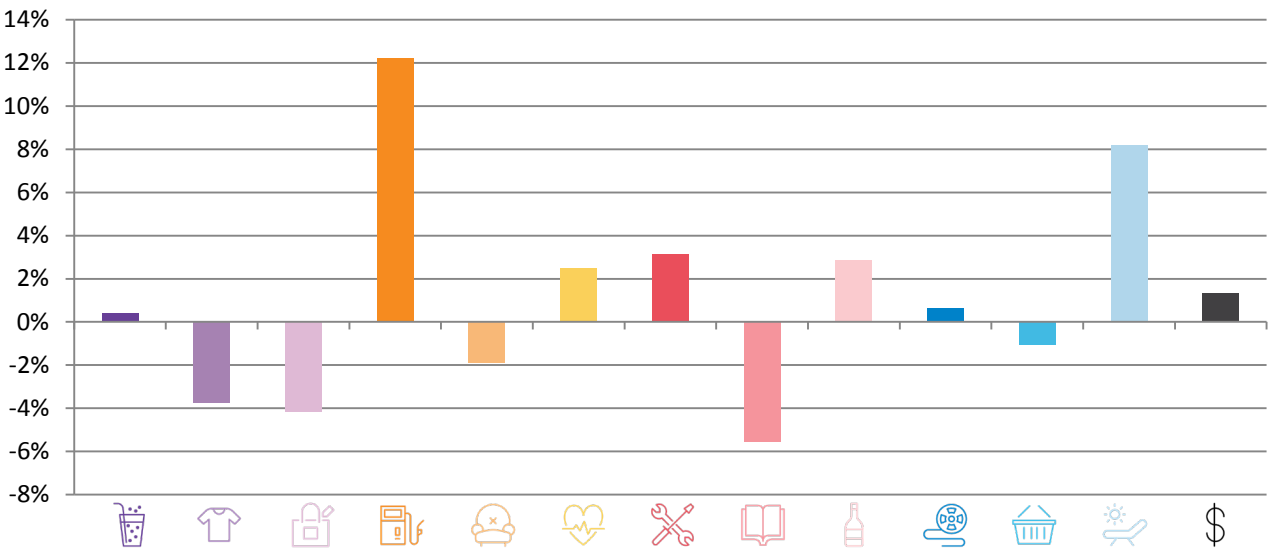
October 2018

Retailer Category	Quarter Total \$M	% Change vs Prior Quarter	% Change vs Last Year	% Share
 Cafés, Restaurants & Bars	1,837	-0.6%	0.4%	15.1%
 Clothing & Footwear	545	-9.7%	-3.8%	4.5%
 Department Stores	573	-7.6%	-4.1%	4.7%
 Fuel & Service Stations	1,315	4.3%	12.2%	10.8%
 Furniture, Appliances & Electronics	639	-2.8%	-1.9%	5.3%
 Health Goods & Services	649	-1.9%	2.5%	5.3%
 Home & Building Supplies	722	14.4%	3.1%	5.9%
 Books & Stationery Stores	130	-4.7%	-5.5%	1.1%
 Liquor Stores	305	3.2%	2.8%	2.5%
 Recreation & Entertainment	517	3.8%	0.6%	4.3%
 Supermarkets & Food Retailers	4,020	1.3%	-1.1%	33.1%
 Travel & Accommodation	890	2.9%	8.2%	7.3%
 <b>TOTAL RETAIL SPEND</b>	<b>12,141</b>	<b>0.8%</b>	<b>1.3%</b>	<b>100%</b>

## Quarterly spend by category (\$M)



## Change vs last year



## Selected regions of interest

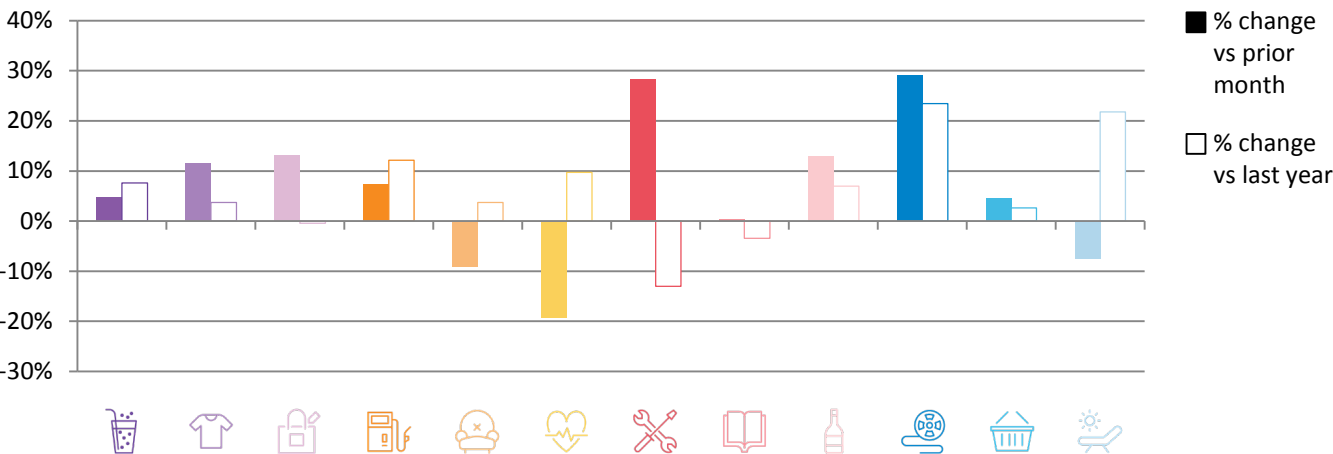
October 2018

### Monthly trends for Gisborne

Retail spend in the Gisborne region for the 28 days ending 28 October 2018 was \$34.1 million. This represents increases in spend of 5.1% from the previous month and year-on-year.

Retail spending in the Gisborne region was up in nine categories compared to October last year. The greatest increase in year-on-year spend was seen in the Recreation & Entertainment category, up 23.5%, while the Home & Building Supplies category had the largest decline, down 13.0%.

Compared to September, nine of the twelve categories experienced an increase in spend. Two categories saw large increases; Recreation & Entertainment (+29.1%) and Home & Building Supplies (+28.2%). The greatest decrease was in the Health Goods & Services category, down 19.2%.

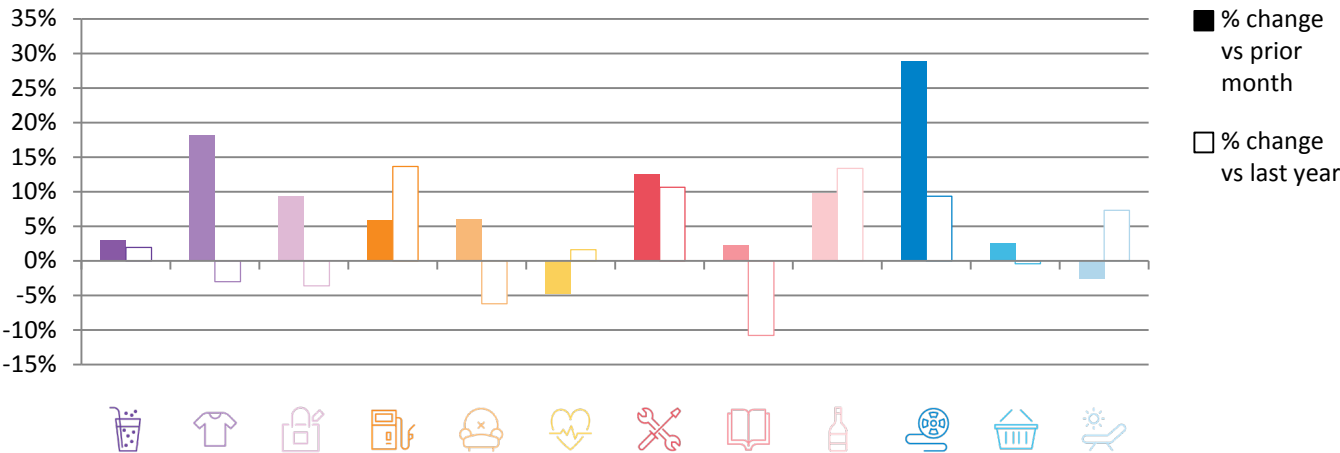


Monthly trends Bay of Plenty

Retail spend in the Bay of Plenty region for the 28 days ending 28 October 2018 was \$186.6 million. This represents an increase of 4.2% against the previous month and an increase of 2.5% year-on-year.

Compared to October 2017, spending was up in seven of the twelve categories, with a 13.7% increase in the Fuel & Service Stations category and a 13.4% increase in the Liquor Stores category. The Books & Stationery Stores category had the greatest decrease in spend when compared to last year, dropping 10.8%.

Month-on-month spend was up in ten categories. The Recreation & Entertainment category took the lead, increasing by 28.8%, followed by the Clothing & Footwear category, which increased by 18.2%. The greatest drop in spending was in the Health Goods & Services category, decreasing by 4.7%.

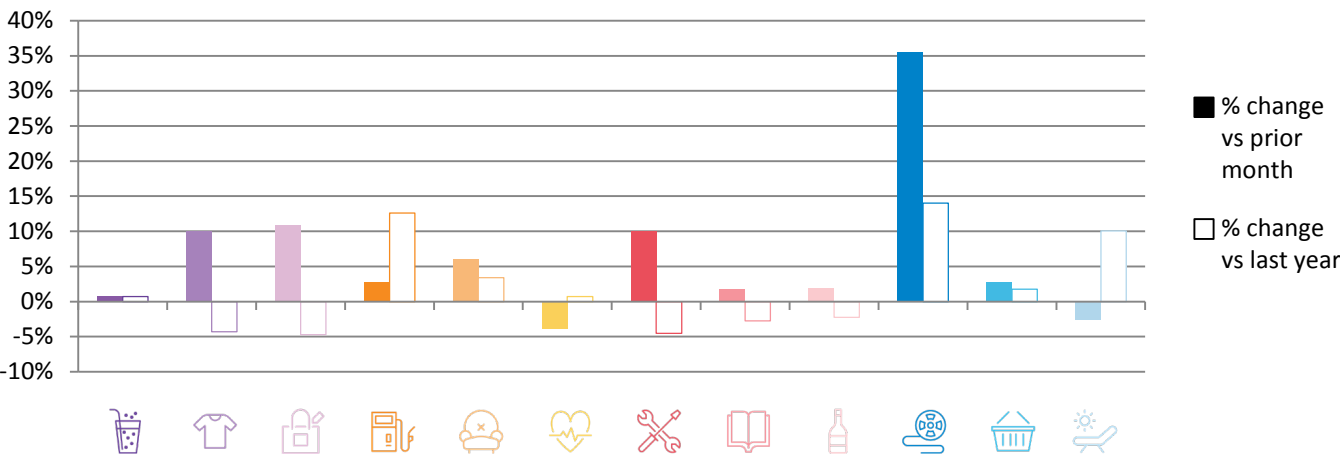


Monthly trends Otago

Retail spend in the Otago region for the 28 days ending 28 October 2018 was \$186.6 million. This represents an increase of 4.2% against the previous month and 2.5% year-on-year.

Retail spending in the Otago region increased in seven of the twelve categories year-on-year. The Recreation & Entertainment category saw the greatest increase in spend, going up by an impressive 35.6%. The largest decreases in spend when compared to October last year were in the Health Goods & Services and Travel & Accommodation categories, down 3.9% and 2.6% respectively.

Compared to September, seven categories experienced increases in spend. The Recreation & Entertainment category increased the most, up 14.0%, while the Department Stores category declined by 4.7%.



## ↑ Going up this month

The greatest increase in spending this month was seen in the Recreation & Entertainment category, up 15.5%.

The West Coast region experienced the greatest increase in spend this month (6.2%) when compared to September 2018.

9

Categories up

16

Regions up

## ↓ Going down this month

The largest decrease in spending this month was seen in the Travel & Accommodation category, down 5.6%.

None of the regions experienced a decrease in spend this month.

1

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 28/10/2018

Total online retail spend in New Zealand for the 28 days ending 28 October 2018 was \$496.2 million. This represents an increase of 5.1% year-on-year and a decrease of 4.8% from the previous month.

Online spending was up in eight of the ten categories year-on-year. Home & Building Supplies retailers saw the greatest increase in spending for the fifth month in a row, up 55.8%. Supermarkets & Food Retailers and Department Stores also continue to increase, up 25.9% and 22.1% respectively.

Month-on-month, four of the ten categories experienced increases in spend. The largest increase in spend was exhibited in the Recreation & Entertainment category, up 9.2%, while the largest drop in month-on-month spend was in the Travel & Accommodation category, down 12.8%.

Online Retailer Category		Month Total \$M	% Change vs Prior Month	% Change vs Last Year	% Share
	Clothing & Footwear	35.3	-0.8%	7.0%	7.1%
	Department Stores	15.2	6.9%	22.1%	3.1%
	Furniture, Appliances & Electronics	37.6	-7.5%	9.4%	7.6%
	Health Goods & Services	11.5	-4.7%	7.4%	2.3%
	Home & Building Supplies	7.4	-5.8%	55.8%	1.5%
	Books & Stationery Stores	7.9	-9.3%	-11.5%	1.6%
	Liquor Stores	3.5	8.3%	1.3%	0.7%
	Recreation & Entertainment	112.5	9.2%	4.6%	22.7%
	Supermarkets & Food Retailers	49.9	1.5%	25.9%	10.1%
	Travel & Accommodation	215.4	-12.8%	-1.0%	43.4%
	<b>Total Online Retail Spend</b>	<b>496.2</b>	<b>-4.8%</b>	<b>5.1%</b>	<b>100%</b>

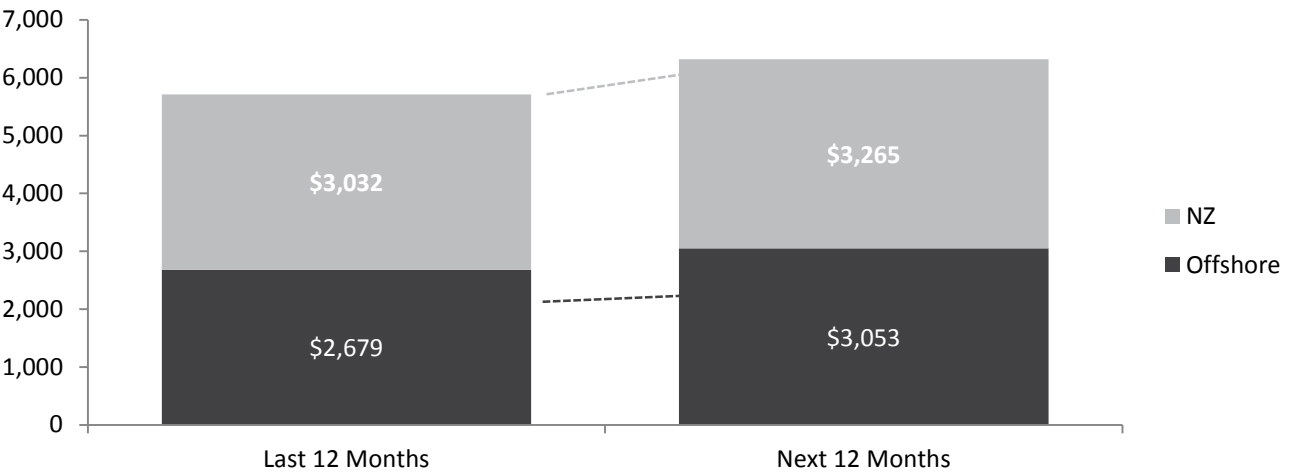
# Online: New Zealand vs Offshore

New Zealand merchants accounted for 56% of online spend for the month of October. This was a decrease of 0.7% compared to the previous month and an increase of 13.4% compared to the previous year.

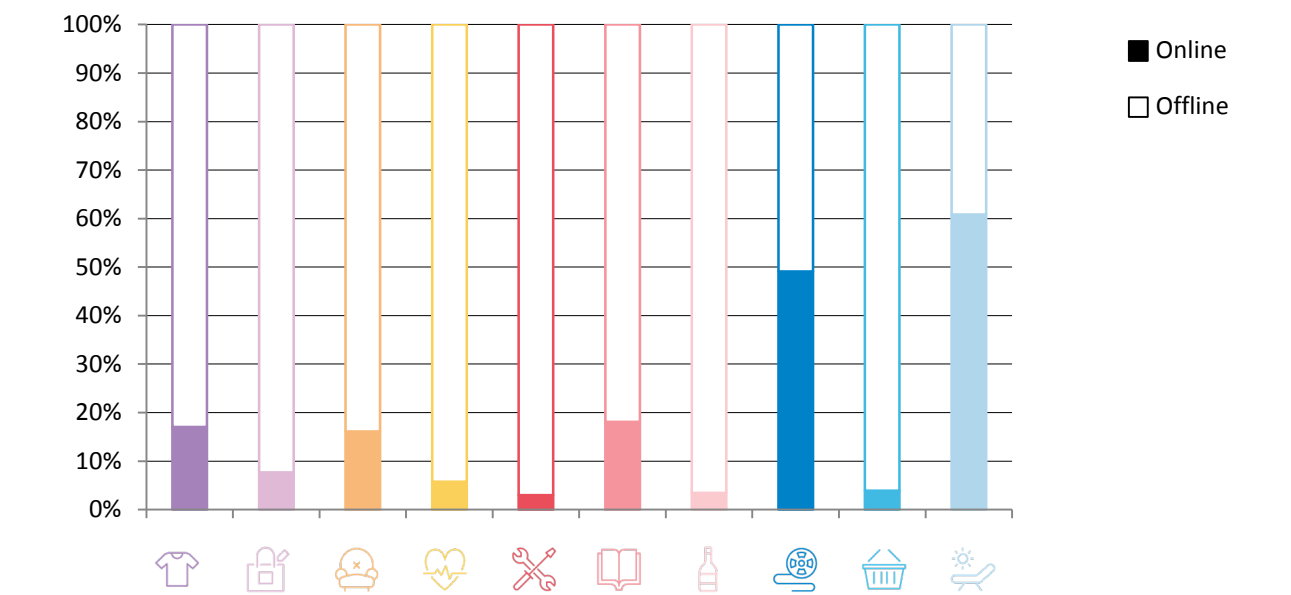
For New Zealand merchants, five of the ten categories saw increases in spend compared to September, with the Recreation & Entertainment category experiencing the greatest increase in spend, up 31.1%. The Health Goods & Services category saw the biggest decrease in online spend, dropping 13.1%. New Zealand merchants saw increases in eight categories when compared to October 2017.

Spend at offshore retail merchants decreased by 9.7% when compared to the previous month and 4.0% when compared to the same period last year. Offshore merchants saw spend increases in five categories year-on-year; the Department Stores category continues to increase, up a whopping 146.8%, while the greatest decrease was seen in the Home & Building Supplies category, down 28.7%.

## Projected total online spend (\$M)














## % share of category spend



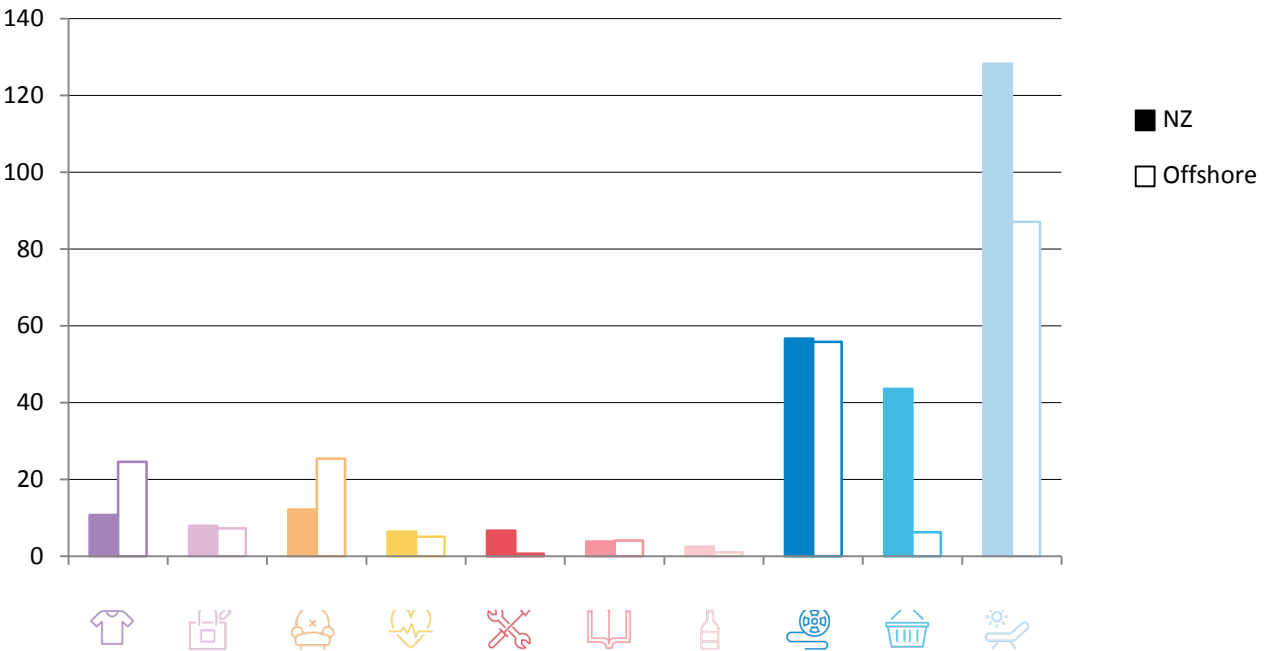


# Online retail market summary New Zealand vs Offshore merchants

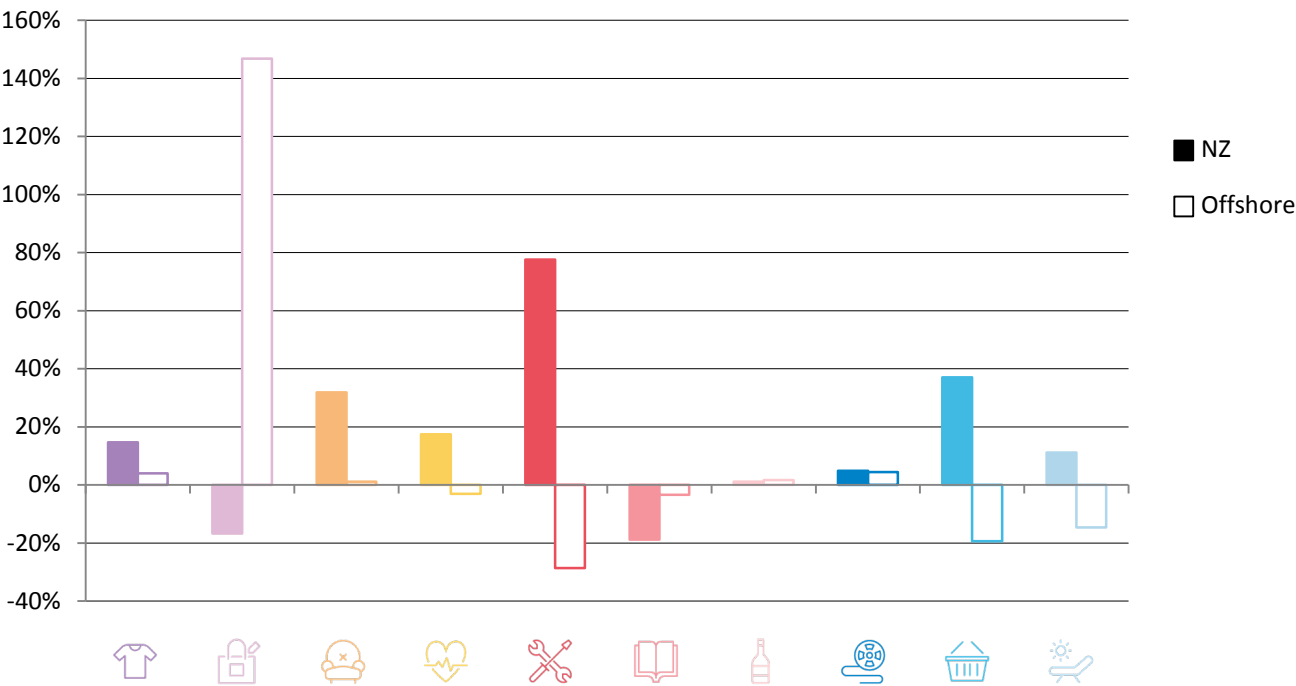
October 2018

Retailer Category	Month Total \$M		% Change vs Prior Month		% Change vs Last Year	
	NZ	Offshore	NZ	Offshore	NZ	Offshore
 Clothing & Footwear	10.7	24.6	4.4%	-3.0%	14.7%	4.0%
 Department Stores	7.9	7.3	17.4%	-2.5%	-16.8%	146.8%
 Furniture, Appliances & Electronics	12.2	25.5	-3.5%	-9.4%	31.9%	1.1%
 Health Goods & Services	6.4	5.1	-13.1%	8.8%	17.4%	-3.0%
 Home & Building Supplies	6.7	0.7	-3.7%	-21.7%	77.6%	-28.7%
 Books & Stationery Stores	3.8	4.1	-8.8%	-9.8%	-18.8%	-3.4%
 Liquor Stores	2.5	1.0	13.9%	-3.8%	1.1%	1.7%
 Recreation & Entertainment	56.7	55.9	31.1%	-6.6%	4.8%	4.4%
 Supermarkets & Food Retailers	43.6	6.3	1.7%	0.6%	37.0%	-19.3%
 Travel & Accommodation	128.3	87.1	-11.1%	-15.2%	11.2%	-14.7%
 <b>Total Retail Spend</b>	<b>278.7</b>	<b>217.4</b>	<b>-0.7%</b>	<b>-9.7%</b>	<b>13.4%</b>	<b>-4.0%</b>

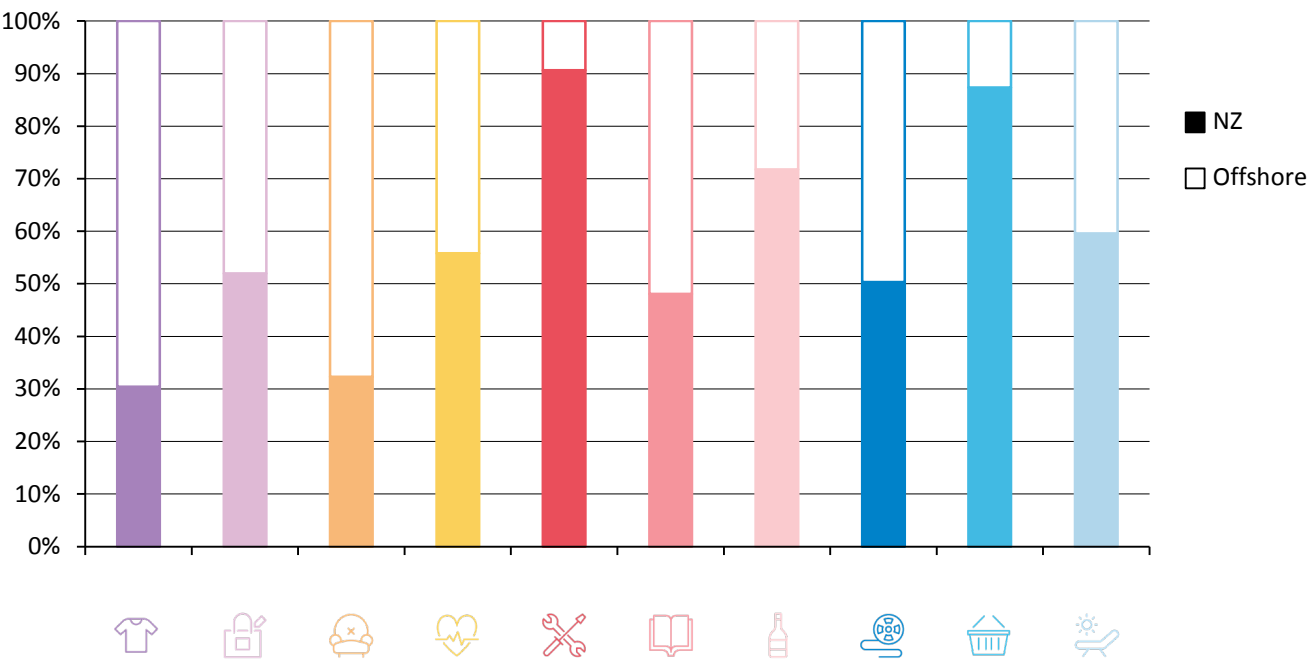
## Online retailer total revenue by category (\$M)



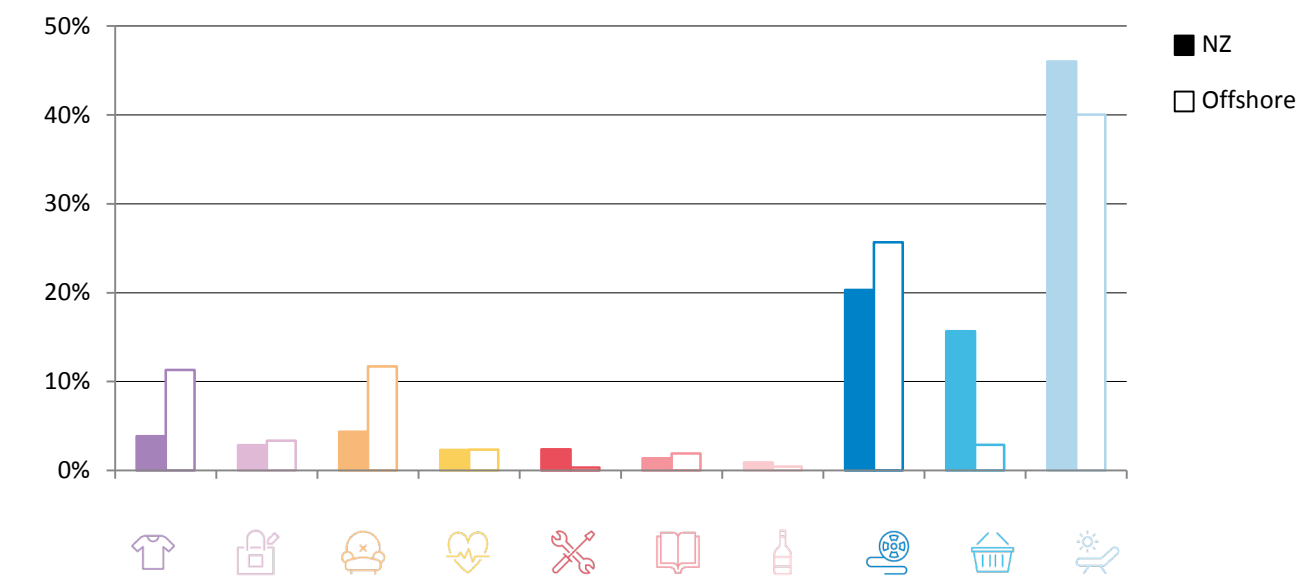
# Monthly online revenue change year-on-year



# 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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