



# Retailwatch














## Value of electronic card transactions within retail categories

Period ending 28/01/2019

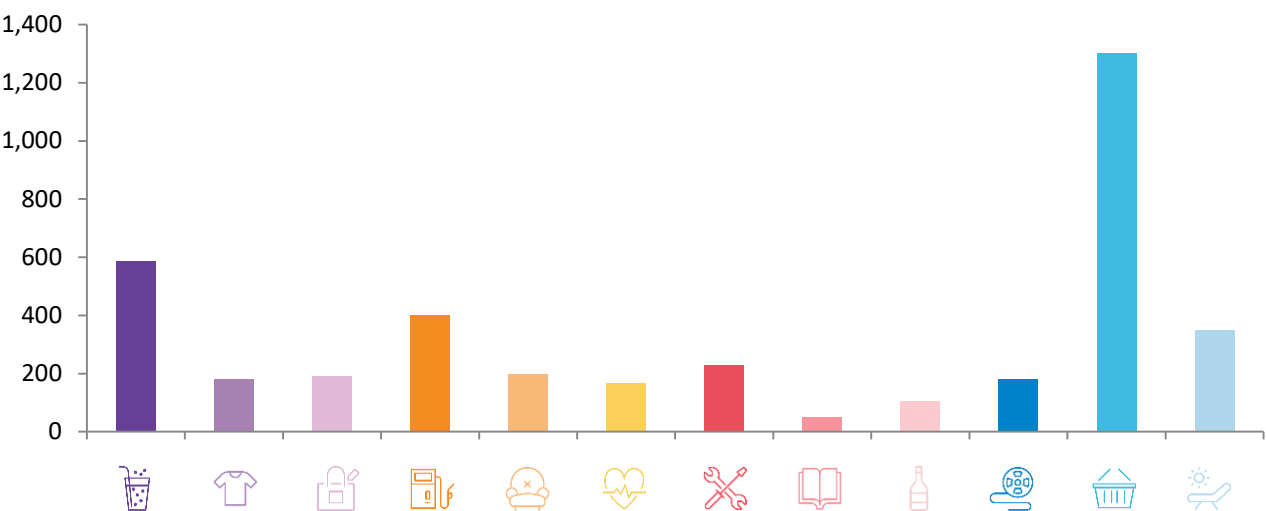
Total retail spend in New Zealand for the 28 days ending 28 January 2019 was \$3.9 billion. This was a decrease of 15.9% compared to December and an increase of 5.4% compared to the same period last year.

Spending was up in eleven of the twelve categories year-on-year; the largest increase was in the Recreation & Entertainment category, up 13.5%. The only decrease year-on-year was in the Books & Stationery Stores category, which dropped 4.0%.

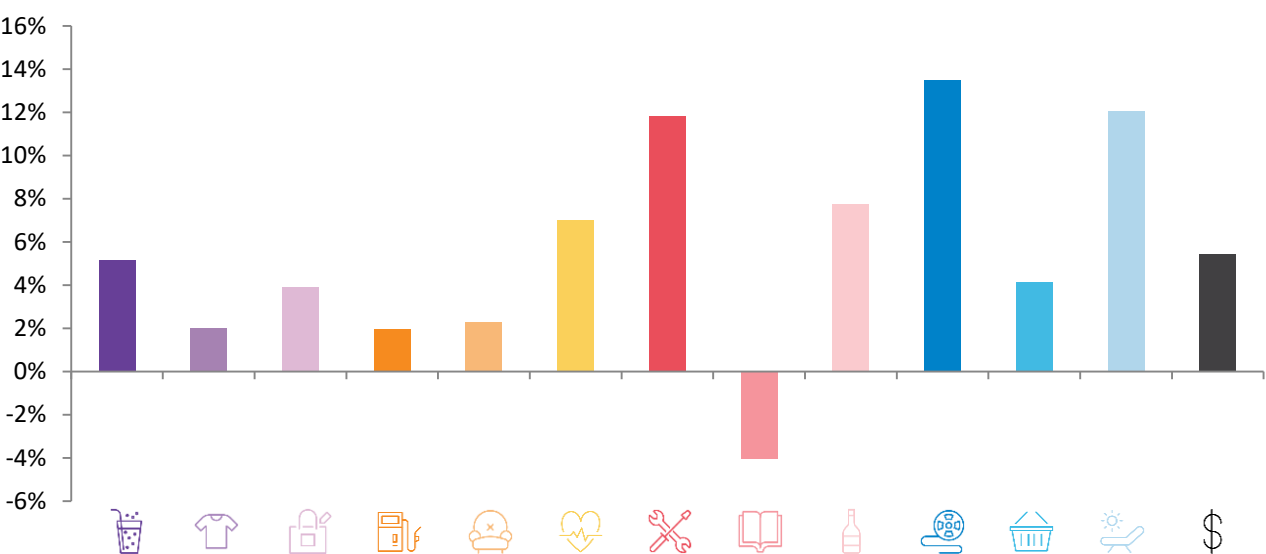
Month-on-month, ten of the twelve categories experienced decreases in spend. The only two increases were in the Travel & Accommodation (+46.1%) and Recreation & Entertainment (+3.0%) categories. The largest decrease was in the Department Stores category, down 51.0%.

Retailer Category	Month Total \$M	% Change vs Prior Month	% Change vs Last Year	% Share
 Cafés, Restaurants & Bars	588	-9.8%	5.1%	14.9%
 Clothing & Footwear	179	-35.2%	2.0%	4.6%
 Department Stores	189	-51.0%	3.9%	4.8%
 Fuel & Service Stations	400	-6.4%	2.0%	10.2%
 Furniture, Appliances & Electronics	198	-37.3%	2.3%	5.0%
 Health Goods & Services	167	-20.9%	7.0%	4.2%
 Home & Building Supplies	230	-17.8%	11.9%	5.8%
 Books & Stationery Stores	50	-32.2%	-4.0%	1.3%
 Liquor Stores	104	-30.1%	7.7%	2.6%
 Recreation & Entertainment	180	3.0%	13.5%	4.6%
 Supermarkets & Food Retailers	1,302	-12.9%	4.1%	33.1%
 Travel & Accommodation	348	46.1%	12.1%	8.9%
 <b>TOTAL RETAIL SPEND</b>	<b>3,935</b>	<b>-15.9%</b>	<b>5.4%</b>	<b>100%</b>

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



## Change vs last year



## Quarterly summary

### January 2018














The total quarterly retail spend for the 91 days ending 28 January 2019 was \$13.8 billion. This was an increase of 8.5% when compared to the previous quarter and an increase of 3.6% 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 once again in the Department Stores category, up 45.0%. Of the three declines in spend, the Health Goods & Services category experienced the largest, dropping 4.6%.

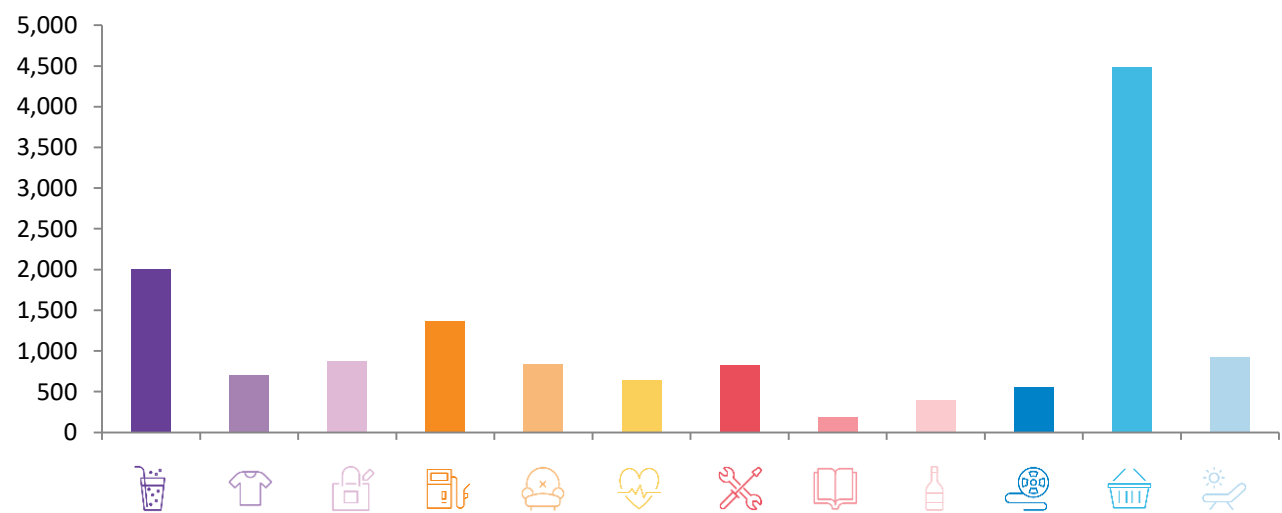
Compared to the same quarter of the previous year, ten of the twelve categories experienced increases in spend. The largest of these increases were in the Travel & Accommodation (+7.8%) and Liquor Stores (+6.2%) categories. The two decreases were in the Books & Stationery Stores (-2.3%) and Clothing & Footwear (-1.4%) categories.

# Quarterly summary

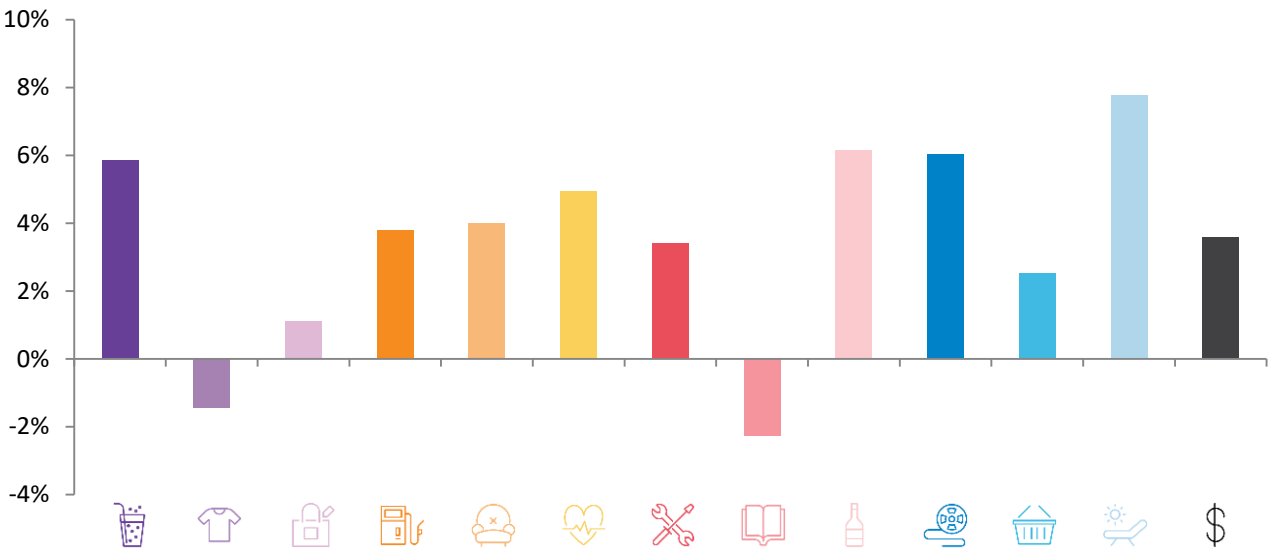
January 2019

Retailer Category	Quarter Total \$M	% Change vs Prior Quarter	% Change vs Last Year	% Share
 Cafés, Restaurants & Bars	2,006	3.1%	5.9%	14.5%
 Clothing & Footwear	709	23.6%	-1.4%	5.1%
 Department Stores	876	45.0%	1.1%	6.3%
 Fuel & Service Stations	1,368	-0.9%	3.8%	9.9%
 Furniture, Appliances & Electronics	835	23.4%	4.0%	6.0%
 Health Goods & Services	643	-4.6%	4.9%	4.7%
 Home & Building Supplies	829	9.2%	3.4%	6.0%
 Books & Stationery Stores	185	35.4%	-2.3%	1.3%
 Liquor Stores	400	25.2%	6.2%	2.9%
 Recreation & Entertainment	558	3.3%	6.0%	4.0%
 Supermarkets & Food Retailers	4,482	6.8%	2.5%	32.4%
 Travel & Accommodation	929	-0.3%	7.8%	6.7%
 <b>TOTAL RETAIL SPEND</b>	<b>13,820</b>	<b>8.5%</b>	<b>3.6%</b>	<b>100%</b>

## Quarterly spend by category (\$M)



## Change vs last year



## Selected regions of interest

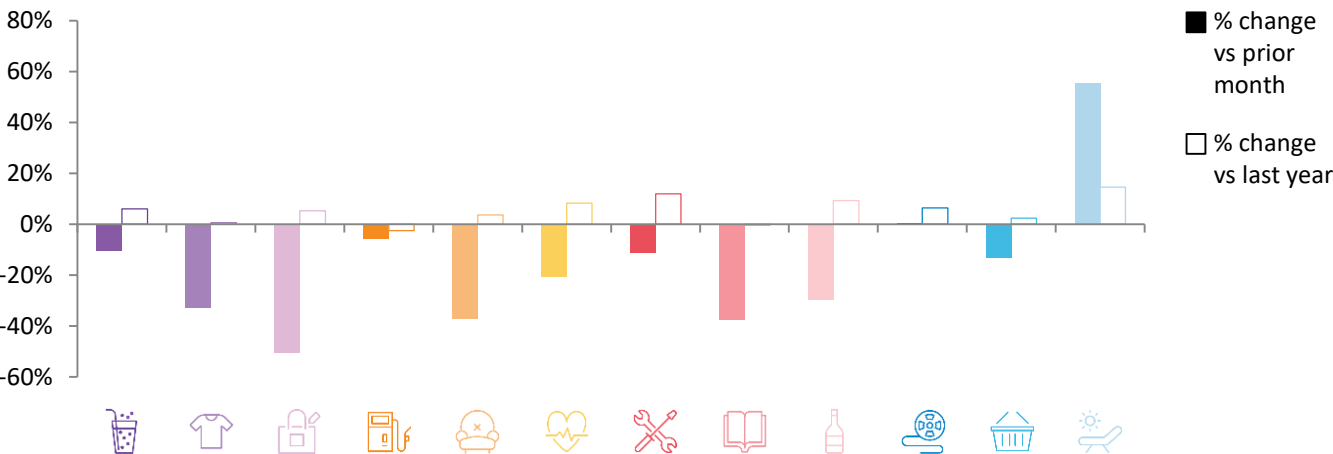
January 2019

### Monthly trends for Wellington

Retail spend in the Wellington region for the 28 days ending 28 January 2019 was \$431 million. This represents a decrease in spend of 15.2% from the previous month and an increase of 4.7% year-on-year.

Retail spending in the Wellington region was up in ten of the twelve categories compared to January of last year. The greatest increase in year-on-year spend was seen in the Travel & Accommodation category (+14.5%), and the greatest decreases were seen in the Fuel & Service Stations (-2.6%) and Books & Stationery Stores (-0.4%) categories.

Compared to December, ten of the twelve categories experienced decreases in spend. The largest of these decreases was experienced in the Department Stores category, down 50.5%. The only two increases were in the Travel & Accommodation (+55.6%) and Recreation & Entertainment (+0.3%) categories.

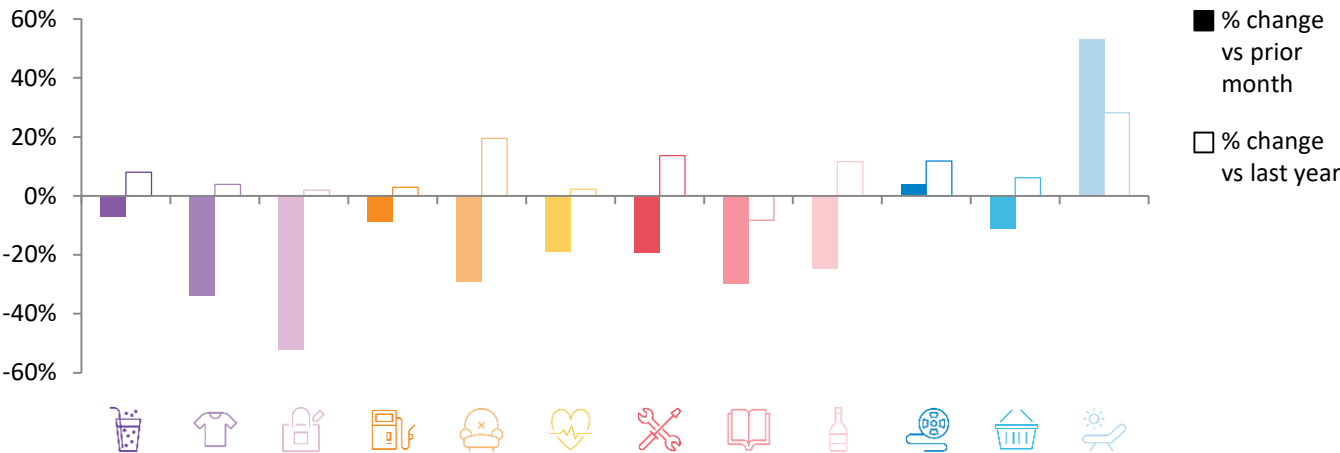


Monthly trends for Northland

Retail spend in the Northland region for the 28 days ending 28 January 2019 was \$136 million. This represents a decrease of 15.0% against the previous month and an increase of 8.1% year-on-year.

Compared to January 2018, spending was up in eleven of the twelve categories. The Travel & Accommodation category had the largest increase, up 28.3%. At the other end of the scale, the Books & Stationery Stores category had the only decrease, dropping 8.2%.

Month-on-month spend was down in ten categories. The largest increase for Northland was in Travel & Accommodation (+52.9%) and the greatest drop in spending out of the ten was in Department Stores (-52.0%).

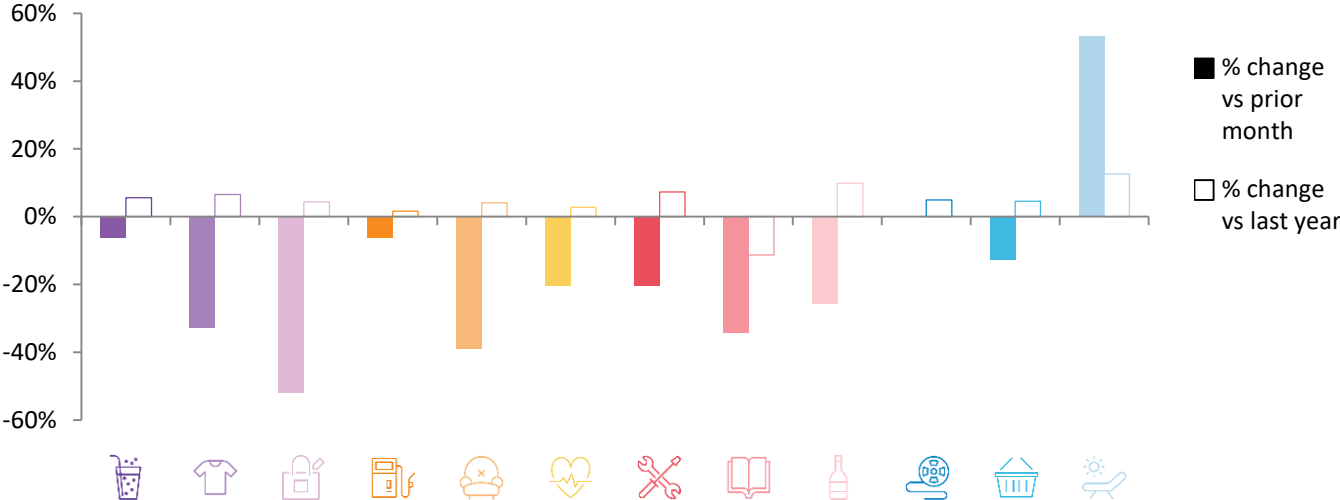


Monthly trends for Waikato

Retail spend in the Southland region for the 28 days ending 28 January 2019 was \$358 million. This represents a decrease of 16.0% against the previous month and an increase of 5.0% year-on-year.

Compared to January 2018, spending was up in eleven of the twelve categories. The increases and decreases follow Wellington and Northland, with the largest increase being in the Travel & Accommodation category, up 12.6%, and the only decrease being in the Books & Stationery category, down 11.3%.

Month-on-month spend was up in only the Travel & Accommodation category, increasing 53.4%. The greatest decrease was in the Department Stores category, declining 51.9%.



## Going up this month

The greatest increase in spending this month was seen in the Travel & Accommodation category, up 46.1%.

No regions experienced an increase in spend this month.

2

Categories up

0

Regions up

## Going down this month

The largest decrease in spending this month was seen in the Department Stores category, down 51.0%.

All of the regions experienced a decrease in spend this month. Auckland dropped the most, declining by 17.0%.

10

Categories down

16

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 28/01/2019

Total online retail spend in New Zealand for the 28 days ending 28 January 2019 was \$546.8 million. This represents increases of 13.3% year-on-year and 5.7% from the previous month.

Online spending was up in nine of the ten categories year-on-year. Home & Building Supplies saw the greatest increase in spending for the eighth month in a row, up 73.5%. The only decrease year-on-year was once again in the Books & Stationery Stores category, declining 4.6%.

Month-on-month, just two categories experienced increases in spend. These increases were seen in the Travel & Accommodation (+43.4%) and Books & Stationery Stores (+4.0%) categories. Of the eight decreases month-on-month, the Liquor Stores category was down the most at 45.4%.

Online Retailer Category		Month Total \$M	% Change vs Prior Month	% Change vs Last Year	% Share
	Clothing & Footwear	32.2	-25.3%	0.2%	5.9%
	Department Stores	18.5	-27.1%	71.1%	3.4%
	Furniture, Appliances & Electronics	39.7	-28.1%	12.1%	7.3%
	Health Goods & Services	11.2	-13.2%	26.2%	2.0%
	Home & Building Supplies	7.3	-4.6%	73.5%	1.3%
	Books & Stationery Stores	12.1	4.0%	-4.6%	2.2%
	Liquor Stores	3.2	-45.4%	9.9%	0.6%
	Recreation & Entertainment	103.2	-10.3%	9.9%	18.9%
	Supermarkets & Food Retailers	45.6	-8.2%	30.3%	8.3%
	Travel & Accommodation	273.8	43.4%	11.0%	50.1%
	<b>Total Online Retail Spend</b>	<b>546.8</b>	<b>5.7%</b>	<b>13.3%</b>	<b>100%</b>

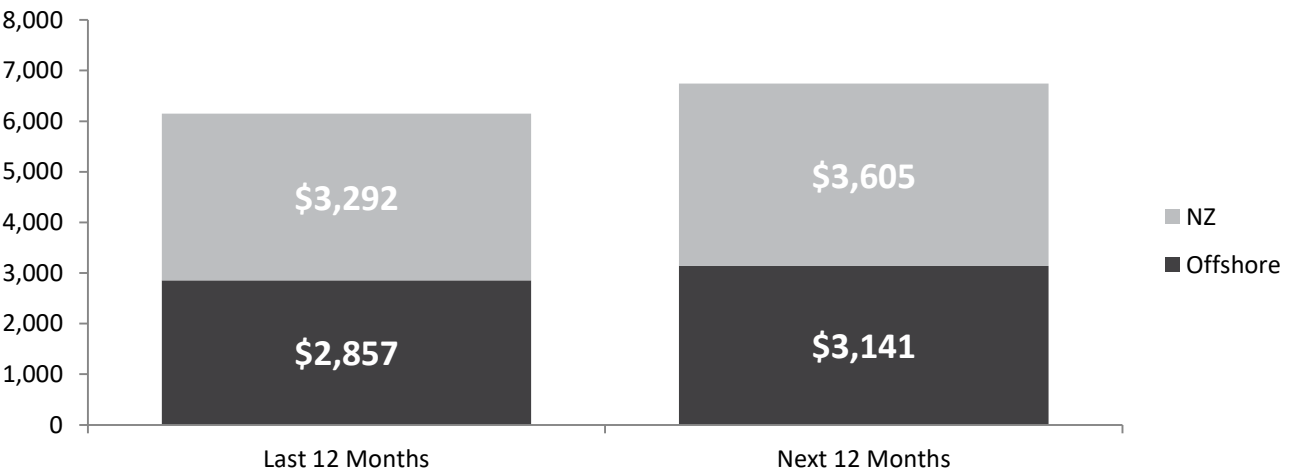
# Online: New Zealand vs Off Shore

New Zealand merchants accounted for 58.0% of online spend for the month of January. This was an increase of 17.7% compared to the previous month and an increase of 20.6% compared to the previous year.

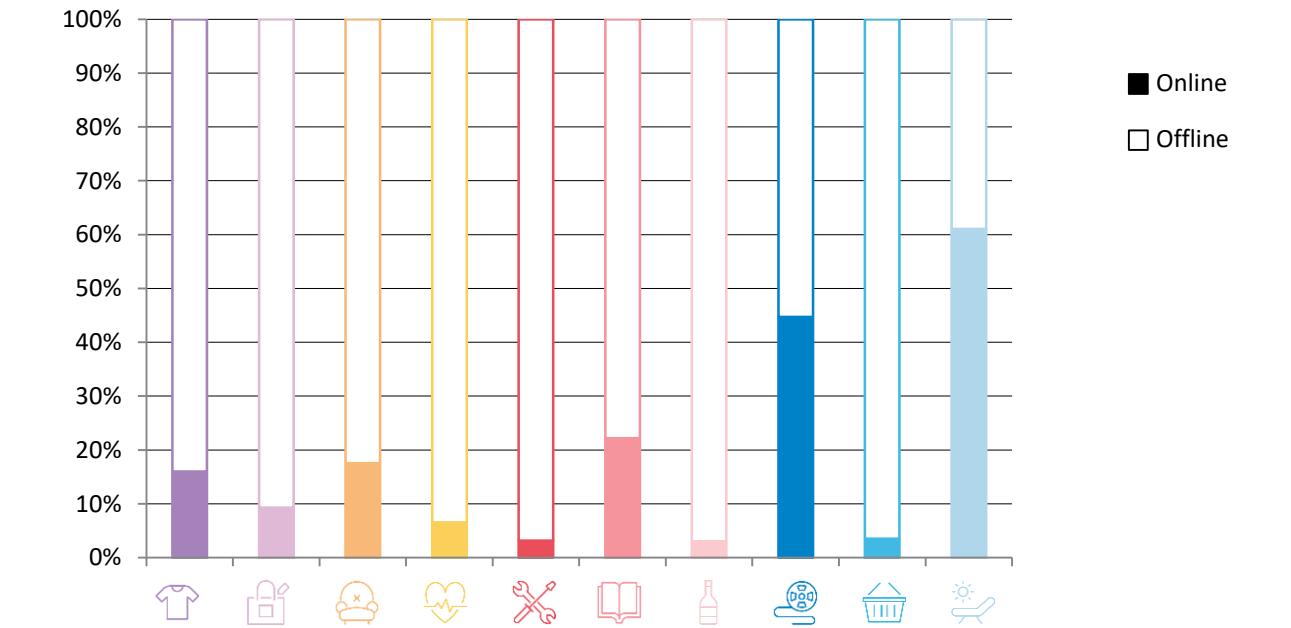
For New Zealand merchants, only three of the ten categories saw increases in spend compared to December, with the Travel & Accommodation category experiencing the greatest increase in spend, up 62.2%. The Department Stores category had the biggest decrease in online spend, dropping 45.9%. New Zealand merchants saw increases in eight categories when compared to January 2018.

Spend at offshore retail merchants decreased by 7.4% when compared to the previous month and increased 4.6% when compared to the same period last year. Offshore merchants saw spend increases in eight categories year-on-year; the Department Stores category continues to increase, up a huge 274.2%, while the greatest decrease was in the Travel & Accommodation category, down 2.0%.

## Projected total online spend (\$M)














## % share of category spend



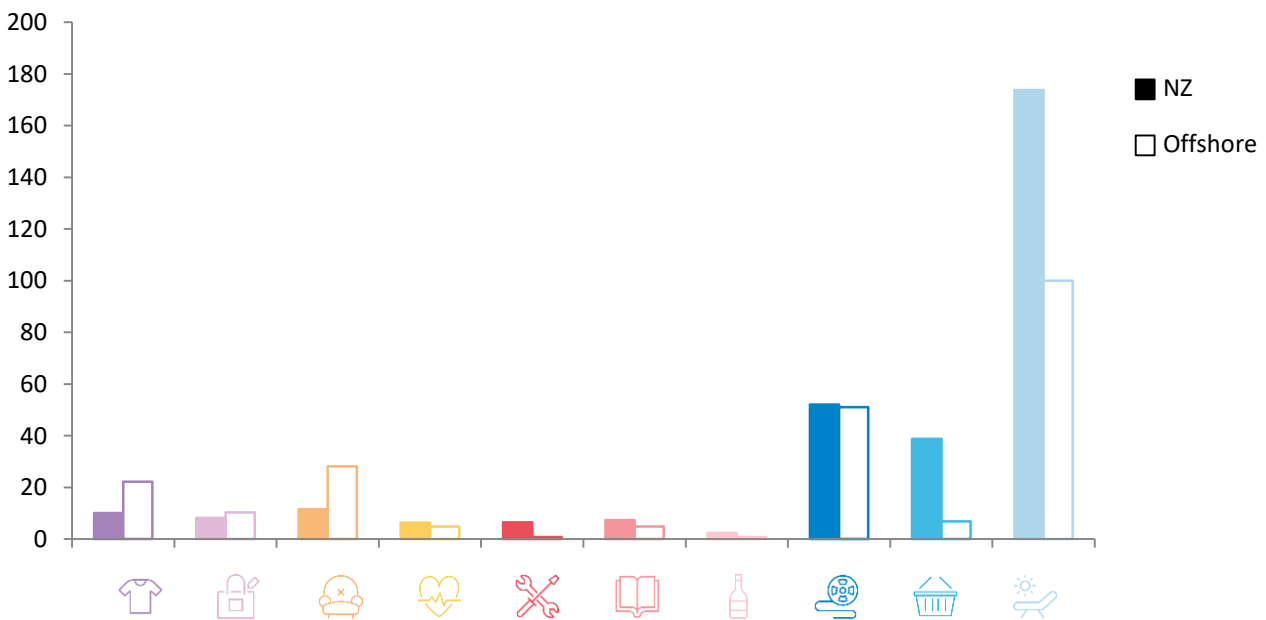


# Online retail market summary New Zealand vs Offshore merchants

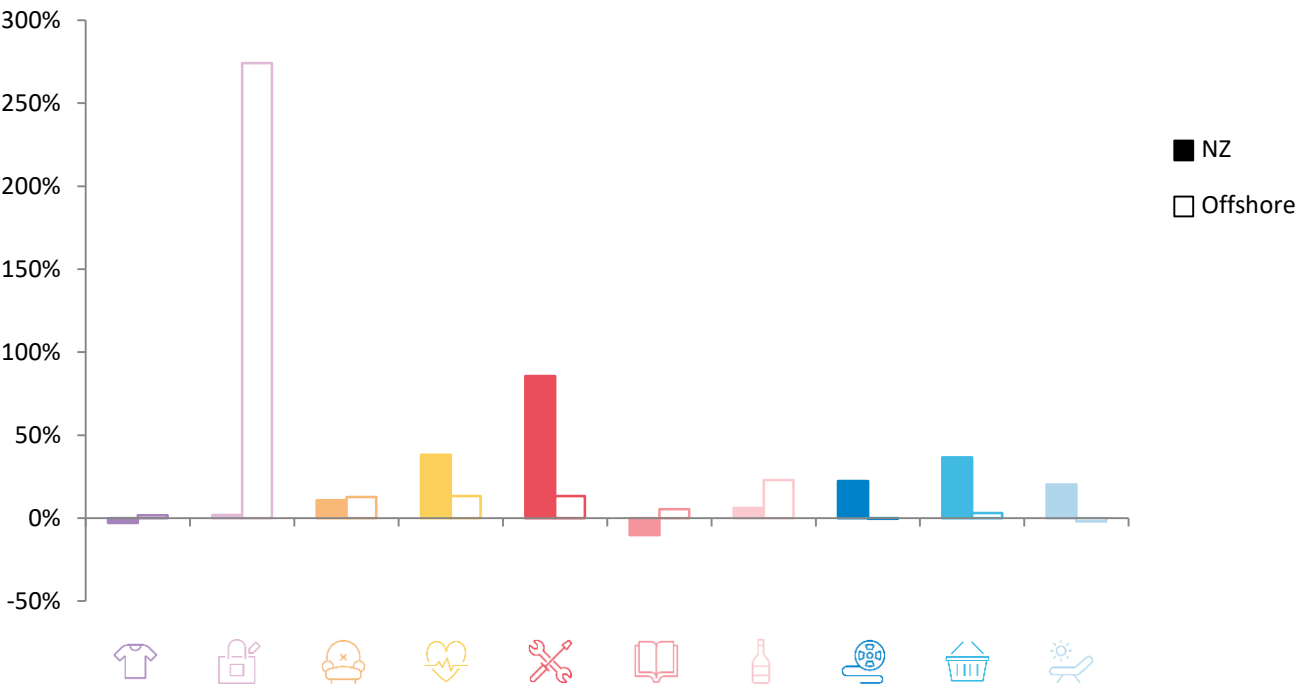
January 2018

Retailer Category	Month Total \$M		% Change vs Prior Month		% Change vs Last Year	
	NZ	Off Shore	NZ	Off Shore	NZ	Off Shore
 Clothing & Footwear	10.0	22.2	-28.1%	-24.0%	-3.0%	1.8%
 Department Stores	8.2	10.3	-45.9%	1.1%	1.9%	274.2%
 Furniture, Appliances & Electronics	11.5	28.2	-40.2%	-21.6%	10.8%	12.6%
 Health Goods & Services	6.3	4.9	-17.5%	-6.7%	38.2%	13.3%
 Home & Building Supplies	6.5	0.8	-3.2%	-15.2%	85.5%	13.2%
 Books & Stationery Stores	7.3	4.8	43.4%	-26.7%	-10.2%	5.3%
 Liquor Stores	2.4	0.8	-36.7%	-61.4%	6.2%	22.9%
 Recreation & Entertainment	52.1	51.0	7.6%	-23.3%	22.3%	-0.4%
 Supermarkets & Food Retailers	38.8	6.8	-7.5%	-12.0%	36.6%	3.0%
 Travel & Accommodation	173.8	100.0	62.2%	19.4%	20.2%	-2.0%
 <b>Total Retail Spend</b>	<b>317.0</b>	<b>229.8</b>	<b>17.7%</b>	<b>-7.4%</b>	<b>20.6%</b>	<b>4.6%</b>

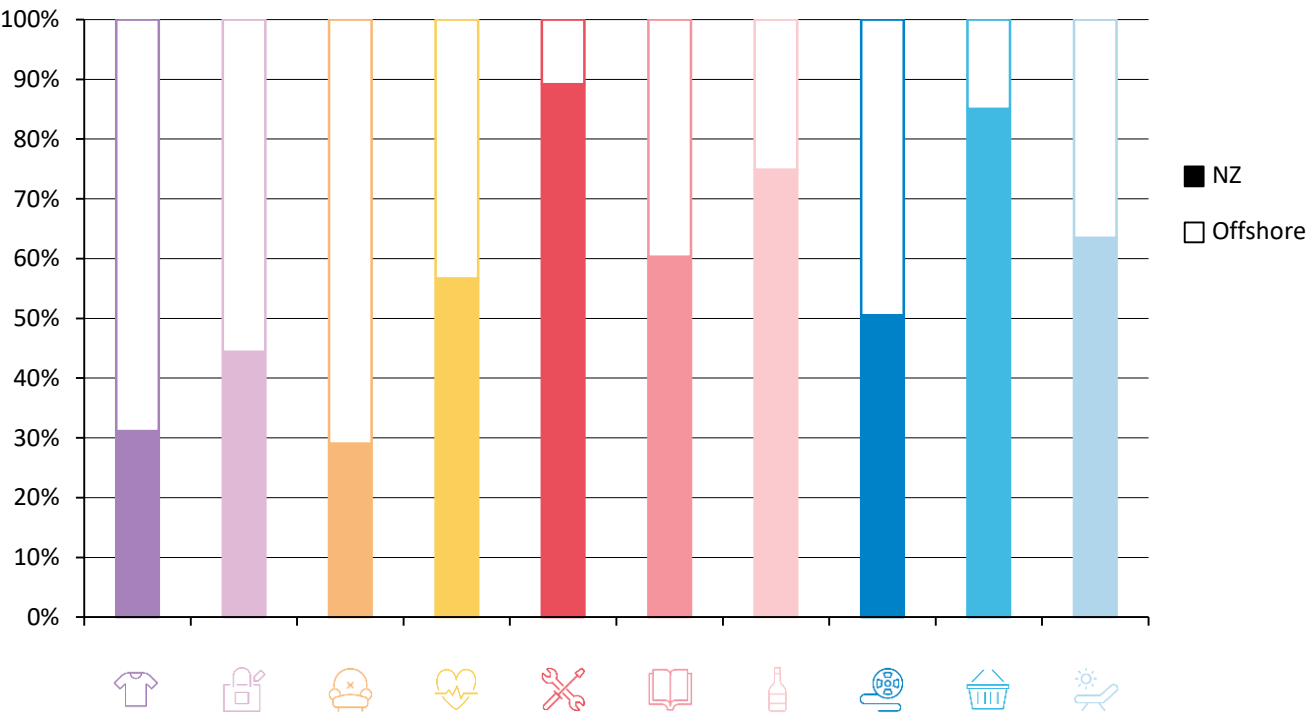
## Online retailer total revenue by category (\$M)



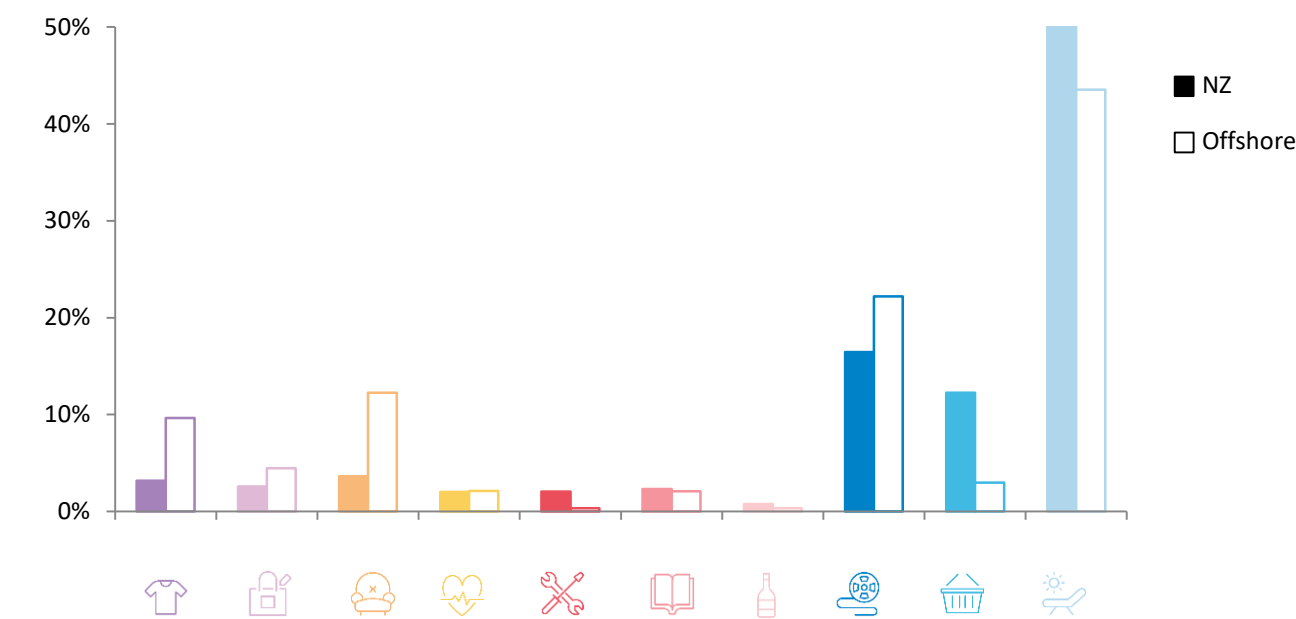
# Monthly online revenue change YOY



# 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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