



Retailwatch














Value of electronic card transactions within retail categories

Period ending 28/04/2019

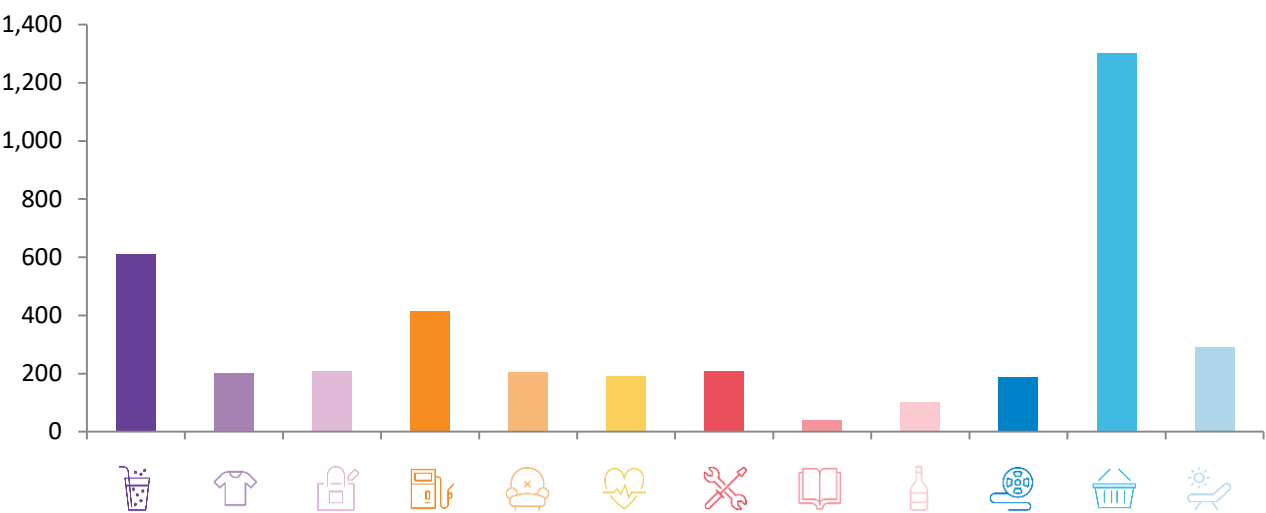
Total retail spend in New Zealand for the 28 days ending 28 April 2019 was \$4 billion. This was an increase of 1.3% compared to March and 3.8% when compared to the same period last year.

Spending was up in eight of the twelve categories year-on-year; the largest increase was in the Recreation & Entertainment category for the 4th month in a row, up 17.8%. The largest decrease year-on-year was in the Books & Stationery Stores category, dropping by 5.3%.

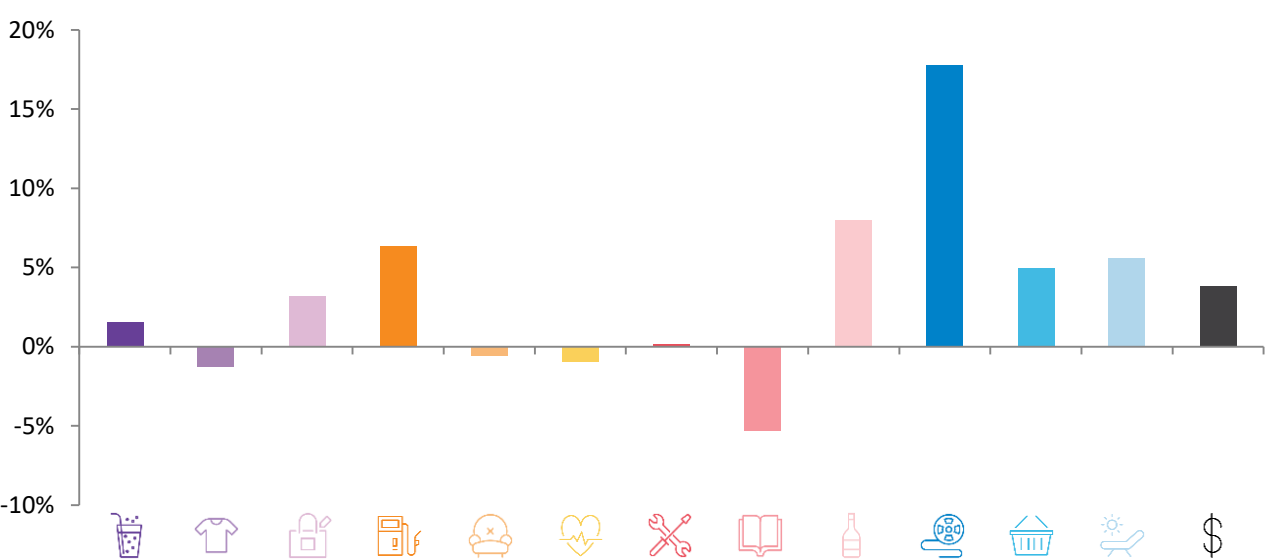
Month-on-month, six of the twelve categories experienced increases in spend. The largest of these increases was in the Department Stores category, going up 22.3%. Dropping the most this month was the Health Goods & Services category, down 10.4%.

Retailer Category	Month Total \$M	% Change vs Prior Month	% Change vs Last Year	% Share
 Cafés, Restaurants & Bars	612	1.6%	1.5%	15.4%
 Clothing & Footwear	202	18.6%	-1.3%	5.1%
 Department Stores	208	22.3%	3.2%	5.2%
 Fuel & Service Stations	415	0.0%	6.3%	10.5%
 Furniture, Appliances & Electronics	203	1.8%	-0.5%	5.1%
 Health Goods & Services	192	-10.4%	-0.9%	4.9%
 Home & Building Supplies	210	-1.2%	0.2%	5.3%
 Books & Stationery Stores	39	-5.7%	-5.3%	1.0%
 Liquor Stores	102	-2.0%	8.0%	2.6%
 Recreation & Entertainment	188	17.0%	17.8%	4.7%
 Supermarkets & Food Retailers	1,300	-1.3%	5.0%	32.8%
 Travel & Accommodation	291	-4.2%	5.6%	7.3%
 TOTAL RETAIL SPEND	3,963	1.3%	3.8%	100%

Monthly retail spend by category (\$M)



Change vs last year



Quarterly summary

April 2018














The total quarterly retail spend for the 91 days ending 28 April 2019 was \$12.9 billion. This was a decrease of 6.3% when compared to the previous quarter and an increase of 2.6% when compared to the same period last year.

Just three of the twelve categories experienced increases in spend when compared to the previous quarter. Going up were the Travel & Accommodation (+9.3%), Recreation & Entertainment (+2.8%) and Health Goods & Services (+2.8%) categories. At the other end of the scale, the Department Stores category dropped the most (-30.5%).

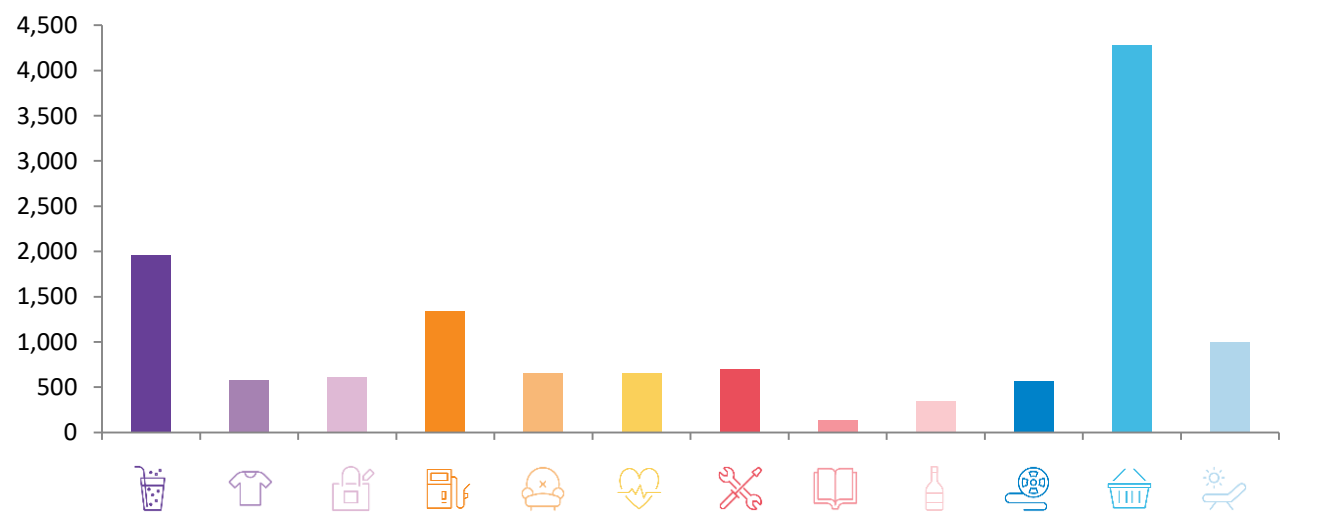
Compared to the same quarter of the previous year, eight categories experienced increases in spend. The increases and decreases mirror February and March, with the Recreation & Entertainment category increasing the most (+13.5%) and the Books & Stationery Stores category decreasing the most (-4.1%).

Quarterly summary

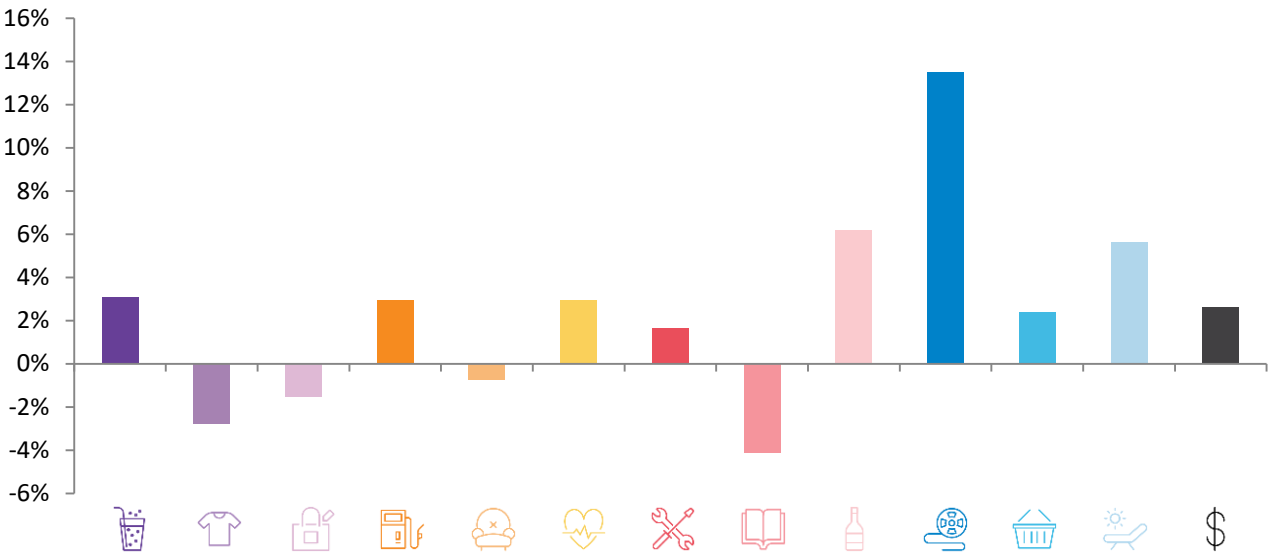
April 2019

Retailer Category	Quarter Total \$M	% Change vs Prior Quarter	% Change vs Last Year	% Share
 Cafés, Restaurants & Bars	1,965	-1.0%	3.1%	15.3%
 Clothing & Footwear	583	-17.0%	-2.8%	4.5%
 Department Stores	606	-30.5%	-1.5%	4.7%
 Fuel & Service Stations	1,345	-1.4%	2.9%	10.5%
 Furniture, Appliances & Electronics	661	-20.0%	-0.7%	5.1%
 Health Goods & Services	661	2.8%	2.9%	5.1%
 Home & Building Supplies	701	-14.0%	1.7%	5.4%
 Books & Stationery Stores	138	-24.4%	-4.1%	1.1%
 Liquor Stores	342	-14.2%	6.2%	2.7%
 Recreation & Entertainment	569	2.8%	13.5%	4.4%
 Supermarkets & Food Retailers	4,285	-3.9%	2.4%	33.3%
 Travel & Accommodation	1,004	9.3%	5.6%	7.8%
 TOTAL RETAIL SPEND	12,861	-6.3%	2.6%	100%

Quarterly spend by category (\$M)



Change vs last year



Selected regions of interest

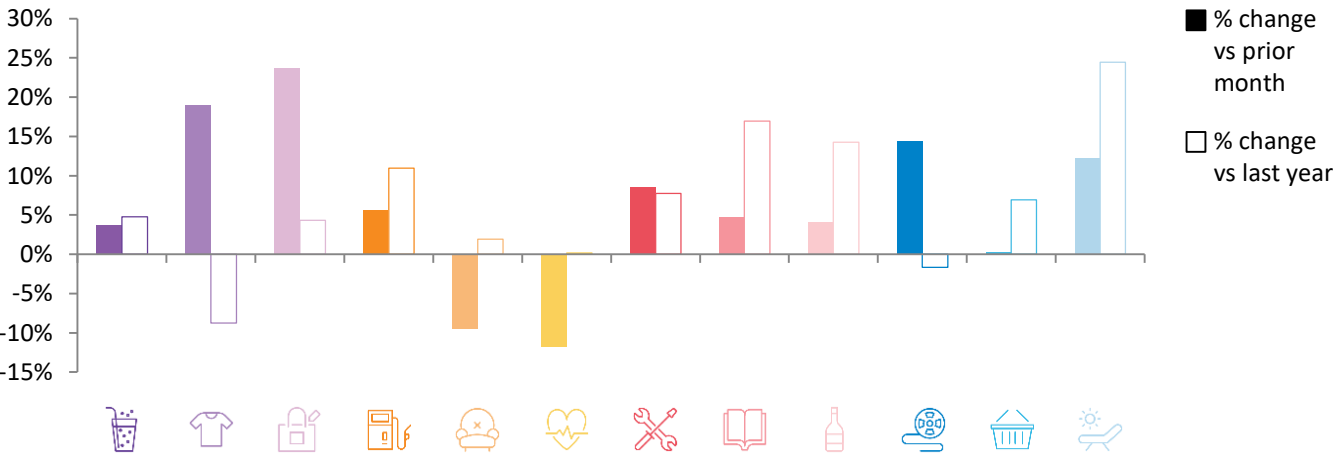
April 2019

Monthly trends for Tasman

Retail spend in the Tasman region for the 28 days ending 28 April 2019 was \$43.5 million. This represents an increase in spend of 4.0% from the previous month and 7.0% year-on-year.

Retail spending in the Tasman region was up in ten of the twelve categories compared to April of last year. The largest increase in year-on-year spend was in the Travel & Accommodation category (+24.5%) while the greatest decrease was in the Clothing & Footwear category (-8.8%).

Compared to March, ten of the twelve categories had an increase in spend. Going up was the Department Stores category, increasing 23.6%, and going down was the Health Goods & Services category, decreasing 11.8%.

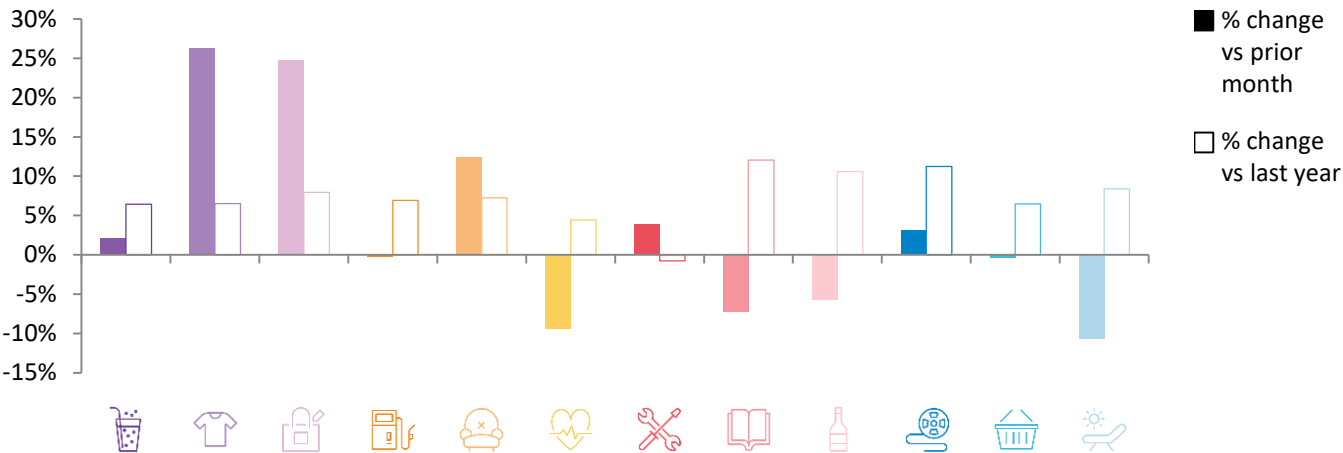


Monthly trends for Hawke’s Bay

Retail spend in the Hawke's Bay region for the 28 days ending 28 April 2019 was \$128.4 million. This represents increases of 1.7% against the previous month and 6.6% year-on-year.

Compared to April 2018, spend was up in eleven categories. The largest increases for Hawke's Bay were in the Books & Stationery Stores (+12.0%) and Recreation & Entertainment (+11.2) categories. The only decrease was in the Home & Building Supplies category, dropping just 0.8%.

Month-on-month spending was up in six of the twelve categories. The Clothing & Footwear category had a 26.3% increase and the Travel & Accommodation category was at the other end of the scale, down 10.6%.

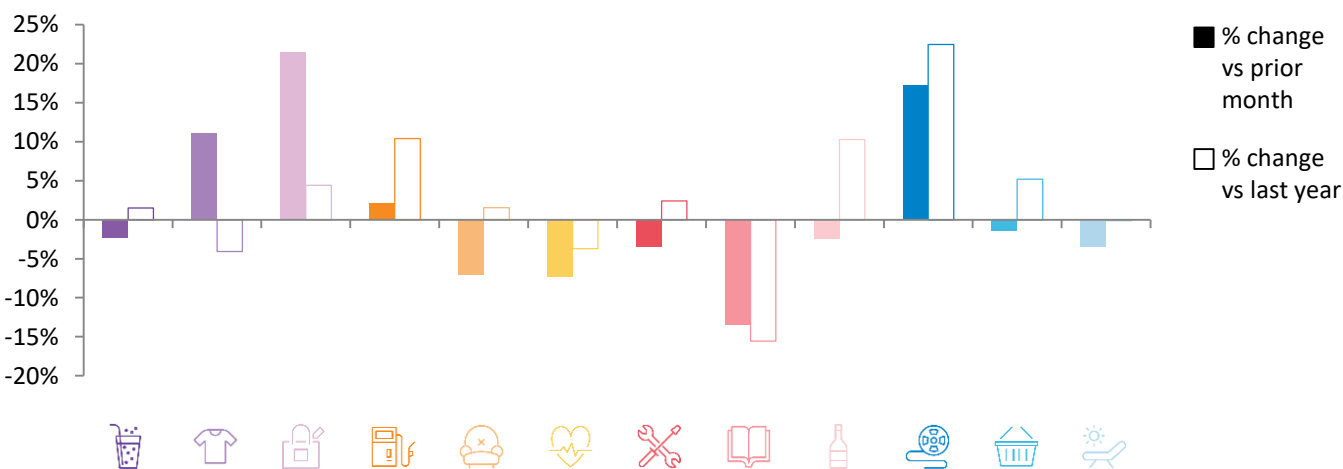


Monthly trends for Otago

Retail spend in the Otago region for the 28 days ending 28 April 2019 was \$194.9 million. This represents increases of 0.4% against the previous month and 4.1% year-on-year.

Compared to April 2018, spending was up in eight of the twelve categories. The Recreation & Entertainment category increased the most (+22.5%), while the greatest drop was in the Books & Stationery Stores category (-15.6%).

Month-on-month spend was up in four categories. Going up were the Department Stores (+21.4%) and Recreation & Entertainment (+17.3%) categories, and going down was the Books & Stationery Stores category (-13.5%).



Going up this month

The greatest increase in spending this month was in the Department Stores category, going up 22.3%.

14 regions experienced an increase in spend this month. The Tasman region increased the most at 4%.

Going down this month

The largest decrease in spending this month was seen in the Health Goods & Services category, down 10.4%.

Gisborne and Northland are the two regions that went down this month.

6

Categories up

14

Regions up

6

Categories down

2

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 28/04/2019

Total online retail spend in New Zealand for the 28 days ending 28 April 2019 was \$543 million. This represents an increase of 7.3% year-on-year and a decrease of 3.8% 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 for the third month in a row, up 48.3%. The largest decrease year-on-year was in the Home & Building Supplies category, declining 21.0%.

Month-on-month, just three categories experienced increases in spend, the largest of which was the Department Stores category (+8.7%). Out of the decreases this month, the Home & Building Supplies category dropped the most (-18.8%).

Online Retailer Category		Month Total \$M	% Change vs Prior Month	% Change vs Last Year	% Share
	Clothing & Footwear	39.0	5.5%	-5.8%	7.2%
	Department Stores	19.1	8.7%	48.3%	3.5%
	Furniture, Appliances & Electronics	44.8	-13.5%	16.9%	8.3%
	Health Goods & Services	11.3	-14.6%	-0.1%	2.1%
	Home & Building Supplies	4.2	-18.8%	-21.0%	0.8%
	Books & Stationery Stores	7.9	-4.1%	-9.7%	1.5%
	Liquor Stores	3.4	-14.0%	-3.3%	0.6%
	Recreation & Entertainment	119.8	0.1%	16.1%	22.1%
	Supermarkets & Food Retailers	51.8	-6.7%	26.5%	9.5%
	Travel & Accommodation	241.5	-4.1%	0.4%	44.5%
	Total Online Retail Spend	542.9	-3.8%	7.3%	100%

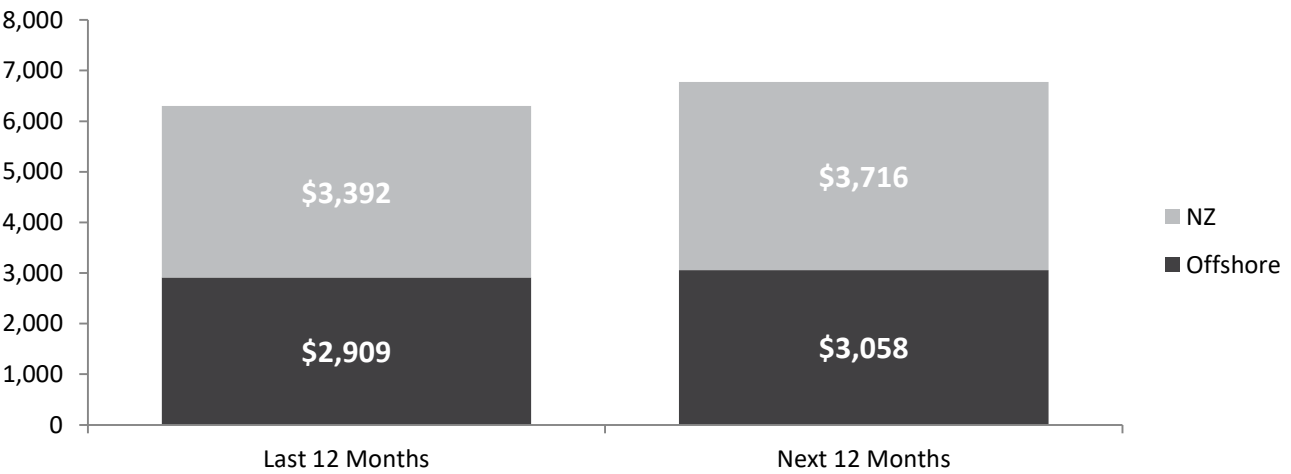
Online: New Zealand vs Offshore

New Zealand merchants accounted for 55.1% of online spend for the month of April. This was a decrease of 2.6% compared to the previous month and an increase of 16.0% compared to the previous year.

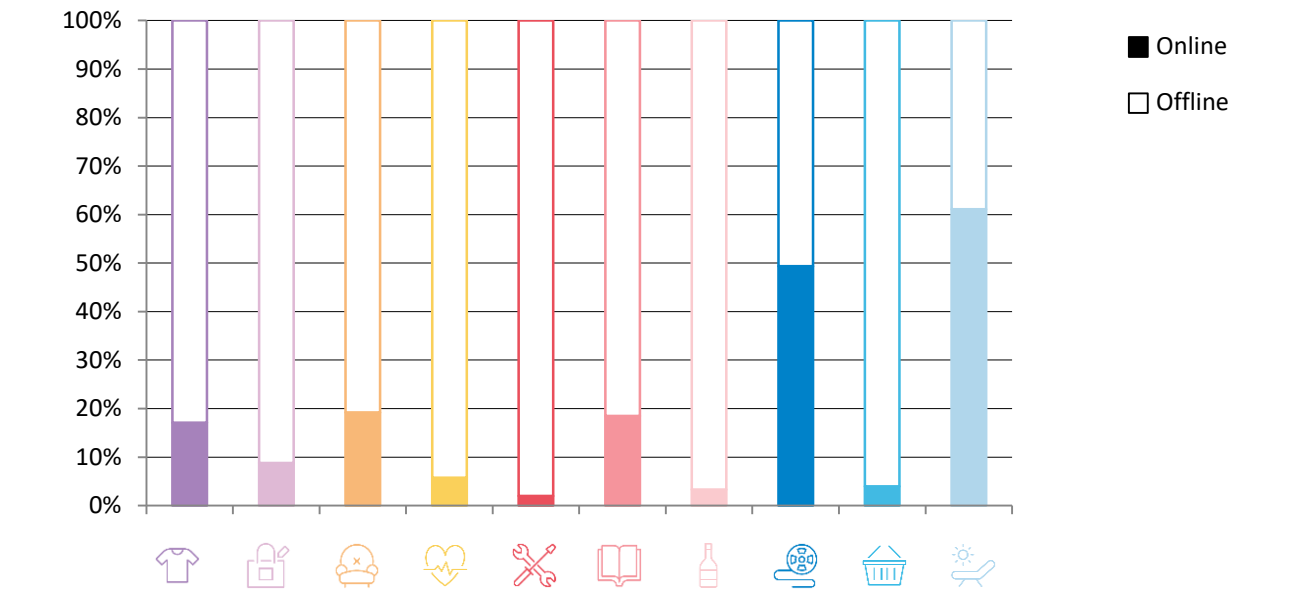
For New Zealand merchants, four of the ten categories saw increases in spend compared to March, with the Department Stores category experiencing the greatest increase in spend, up 20.4%. The Home & Building Supplies category had the biggest decrease in online spend, dropping 21.8%. New Zealand merchants saw increases in four categories when compared to April 2018.

Spend at offshore retail merchants decreased by 5.2% when compared to the previous month and 1.8% 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 213.4%.

Projected total online spend (\$M)














% share of category spend

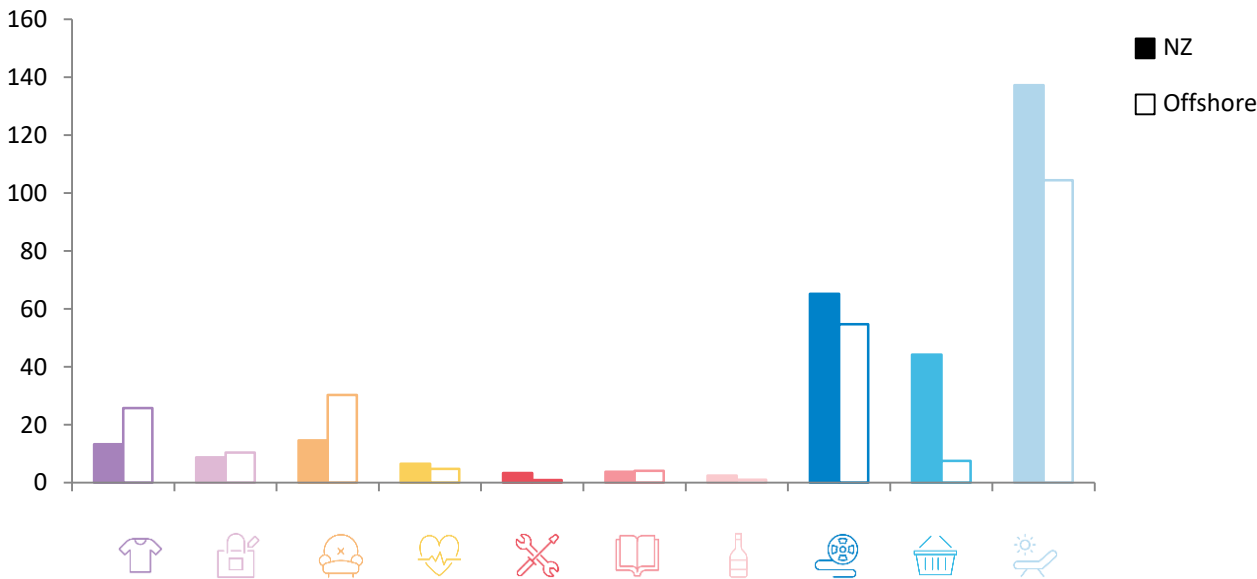


Online retail market summary New Zealand vs Offshore merchants

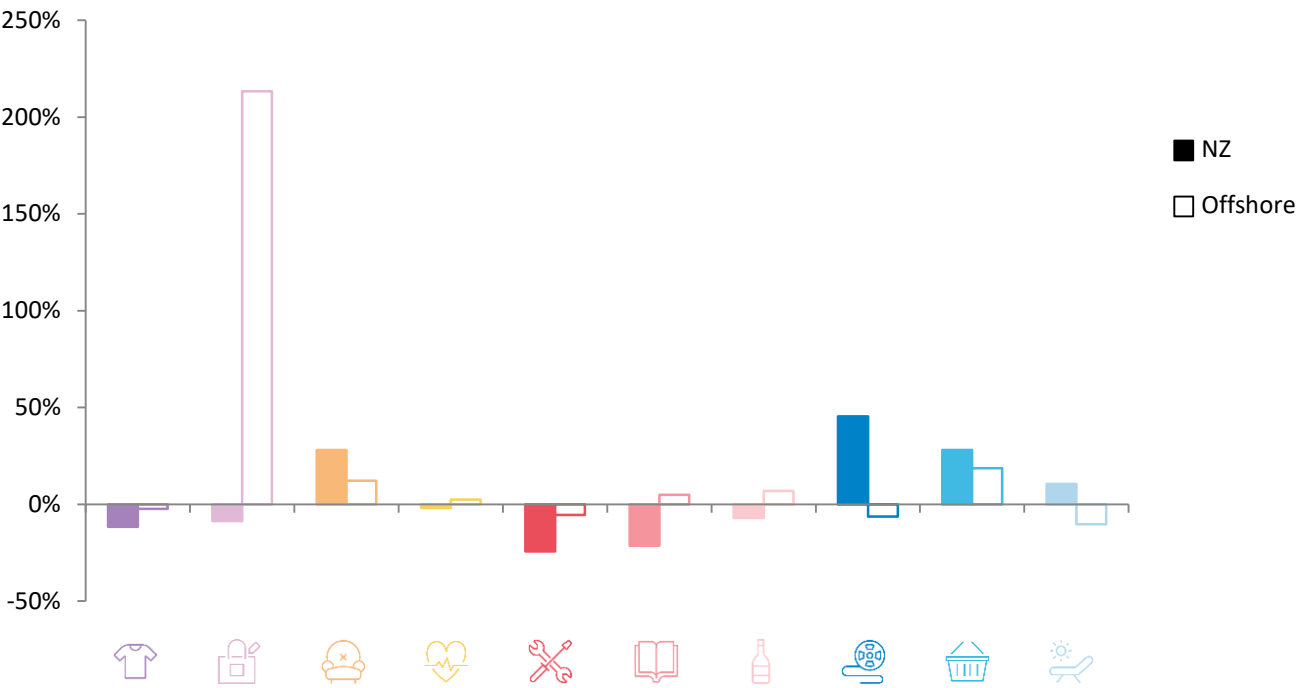
April 2018

Retailer Category	Month Total \$M		% Change vs Prior Month		% Change vs Last Year	
	NZ	Off Shore	NZ	Off Shore	NZ	Off Shore
 Clothing & Footwear	13.2	25.7	14.0%	1.6%	-11.7%	-2.4%
 Department Stores	8.8	10.4	20.4%	0.4%	-8.7%	213.4%
 Furniture, Appliances & Electronics	14.6	30.3	-19.8%	-10.0%	28.0%	12.2%
 Health Goods & Services	6.5	4.8	-11.5%	-18.5%	-1.8%	2.4%
 Home & Building Supplies	3.3	0.9	-21.8%	-5.5%	-24.4%	-5.6%
 Books & Stationery Stores	3.8	4.1	5.3%	-11.4%	-21.3%	4.8%
 Liquor Stores	2.4	1.0	-19.0%	0.9%	-7.0%	7.0%
 Recreation & Entertainment	65.2	54.6	17.3%	-14.9%	45.3%	-6.3%
 Supermarkets & Food Retailers	44.2	7.6	-7.2%	-3.7%	28.0%	18.7%
 Travel & Accommodation	137.2	104.4	-7.7%	1.1%	10.5%	-10.3%
 Total Retail Spend	299.2	243.7	-2.6%	-5.2%	16.0%	-1.8%

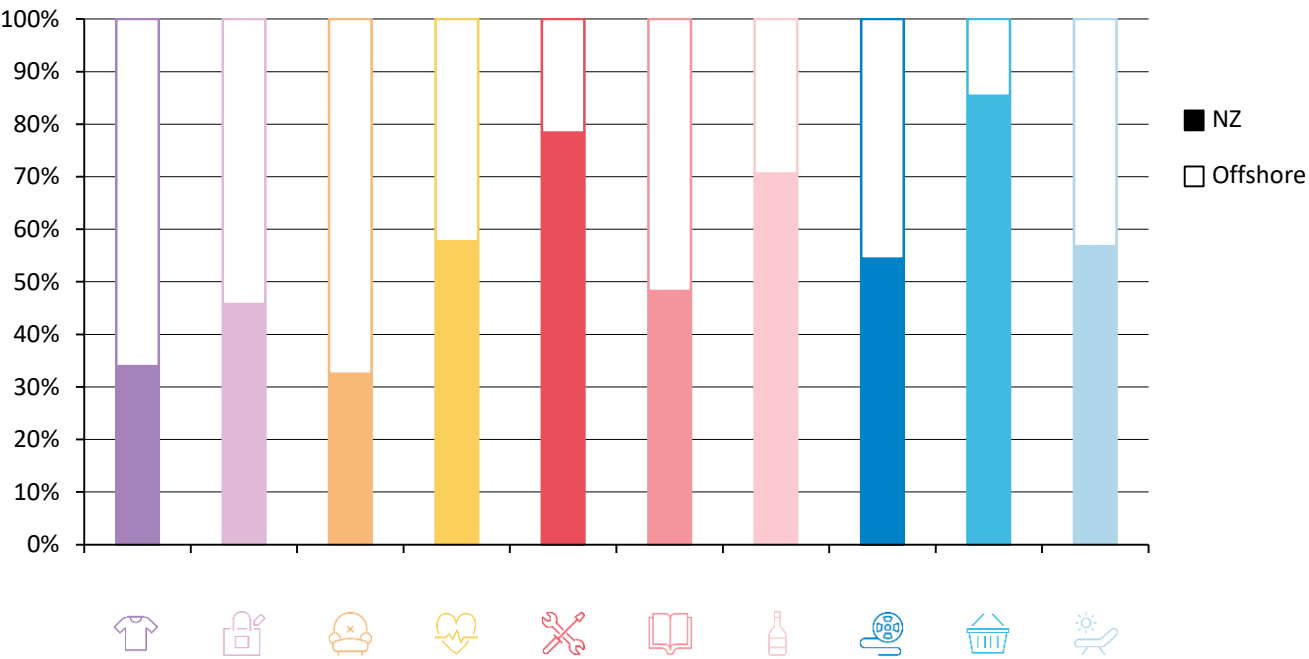
Online retailer total revenue by category (\$M)



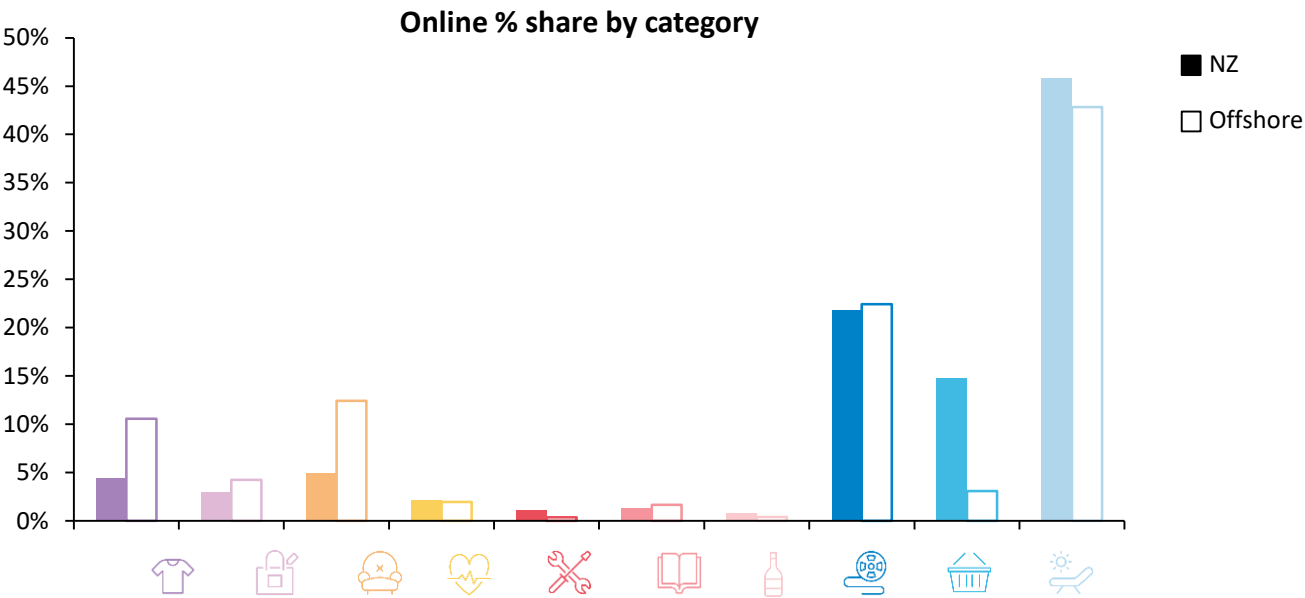
Monthly online revenue change YOY



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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