



# Retailwatch














## Value of electronic card transactions within retail categories

Period ending 28/12/2018

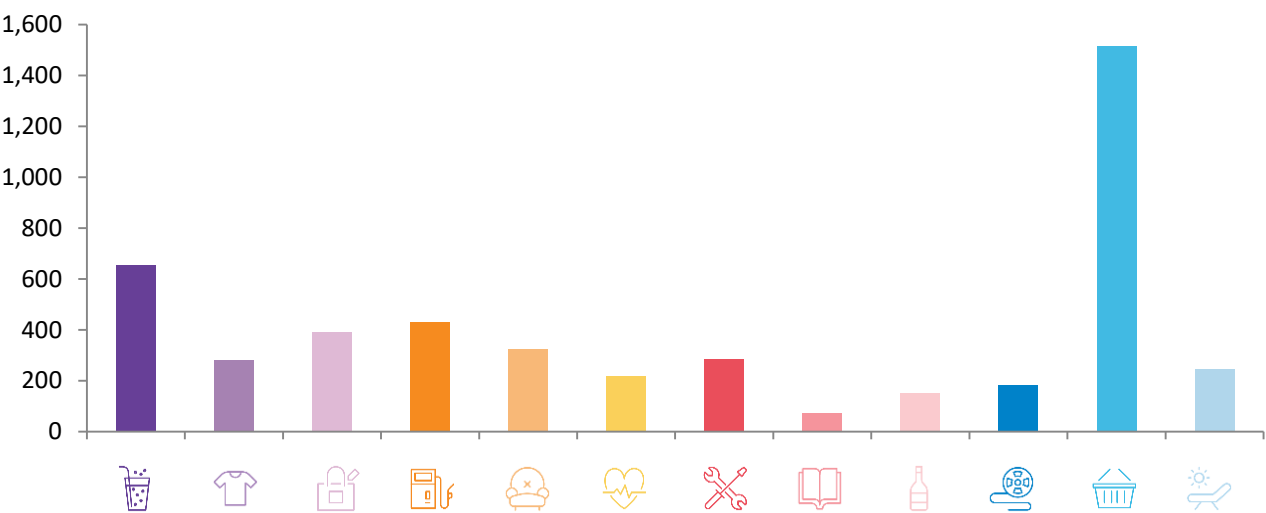
Total retail spend in New Zealand for the 28 days ending 28 December 2018 was \$4.8 billion. This was an increase of 15.0% compared to November and up 3.0% compared to the same period last year.

Spending was up in ten categories year-on-year; the two largest increases were seen in the Travel & Accommodation category, up 7.6%, and the Recreation & Entertainment category, up 6.1%. The only decreases year-on-year were in the Clothing & Footwear (-3.0%) and Books & Stationery Stores (-0.4%) categories.

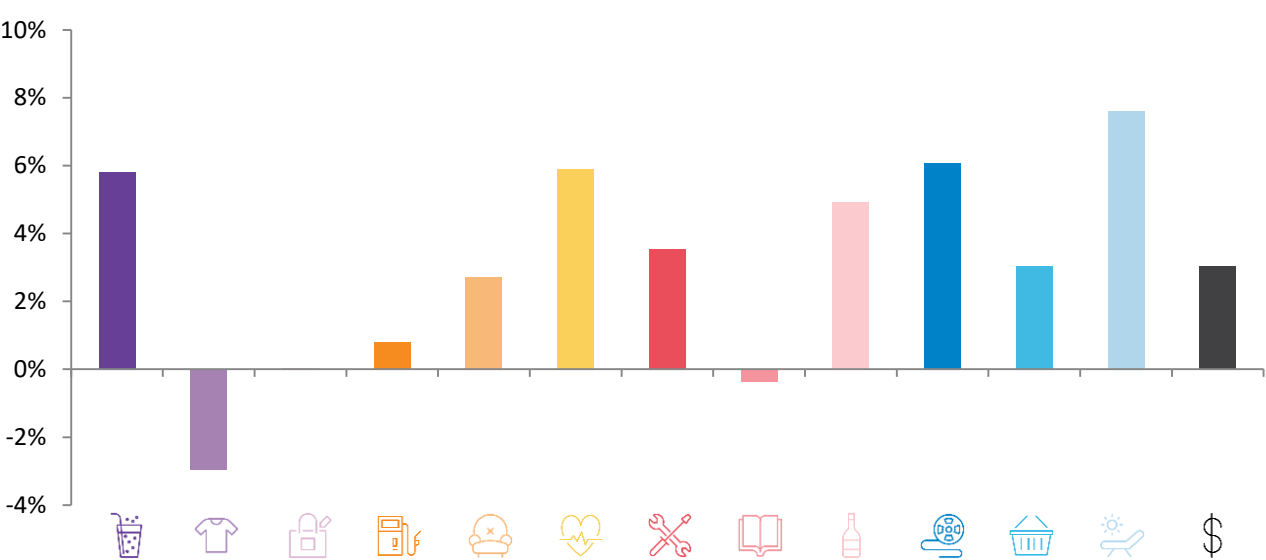
Month-on-month, ten of the twelve categories experienced increases in spend. The Department Stores category increased the most once again, up 60.4%, and the Books & Stationery Stores category was not far behind with an increase of 52.4%. The largest decrease seen was in the Travel & Accommodation category, down 10.1%.

| Retailer Category  | Month Total \$M | % Change vs Prior Month | % Change vs Last Year | % Share     |
|--|-----------------|-------------------------|-----------------------|-------------|
|  Cafés, Restaurants & Bars           | 655             | 8.2%                    | 5.8%                  | 13.8%       |
|  Clothing & Footwear                 | 282             | 37.5%                   | -3.0%                 | 5.9%        |
|  Department Stores                   | 393             | 60.4%                   | 0.0%                  | 8.2%        |
|  Fuel & Service Stations             | 432             | 1.1%                    | 0.8%                  | 9.1%        |
|  Furniture, Appliances & Electronics | 324             | 24.5%                   | 2.7%                  | 6.8%        |
|  Health Goods & Services             | 216             | -0.4%                   | 5.9%                  | 4.5%        |
|  Home & Building Supplies            | 287             | 15.2%                   | 3.5%                  | 6.0%        |
|  Books & Stationery Stores           | 75              | 52.4%                   | -0.4%                 | 1.6%        |
|  Liquor Stores                       | 151             | 39.1%                   | 4.9%                  | 3.2%        |
|  Recreation & Entertainment          | 182             | 11.7%                   | 6.1%                  | 3.8%        |
|  Supermarkets & Food Retailers       | 1,517           | 13.5%                   | 3.0%                  | 31.9%       |
|  Travel & Accommodation              | 246             | -10.1%                  | 7.6%                  | 5.2%        |
|  <b>TOTAL RETAIL SPEND</b>           | <b>4,762</b>    | <b>15.0%</b>            | <b>3.0%</b>           | <b>100%</b> |

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



## Change vs last year



## Quarterly summary

### December 2018














The total quarterly retail spend for the 91 days ending 28 December 2018 was \$14 billion. This was an increase of 12.0% when compared to the previous quarter and an increase of 4.3% when compared to the same period last year.

Eleven of the twelve categories experienced increases in spend when compared to the previous quarter. The largest of these increases was in the Department Stores category, up 50.4%, while the Travel & Accommodation category experienced the only decline in spend, down 5.4%.

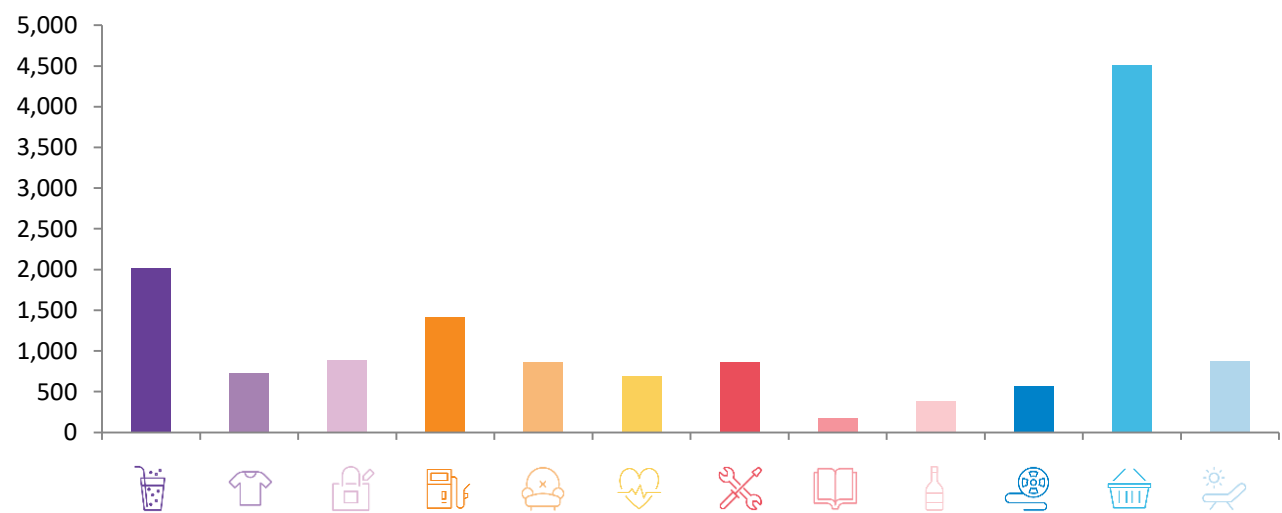
Compared to the same quarter of the previous year, ten of the twelve categories experienced increases in spend. The largest of these increases was in the Fuel & Service Stations (+9.6%) and Travel & Accommodation (+8.7%) categories.

# Quarterly summary

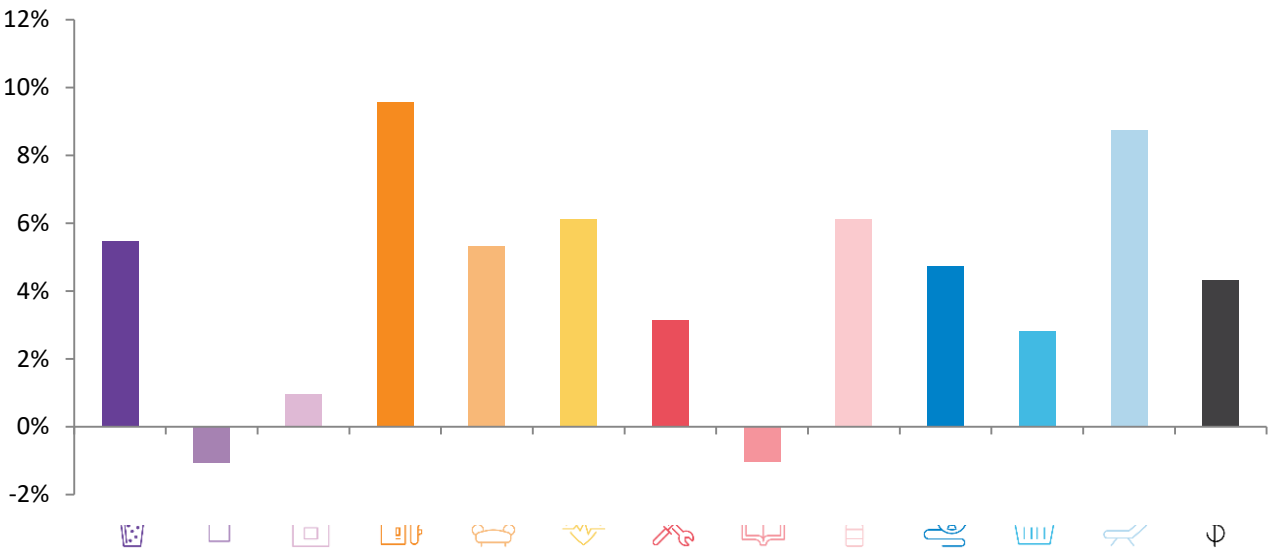
December 2018

| Retailer Category  | Quarter Total \$M | % Change vs Prior Quarter | % Change vs Last Year | % Share     |
|--|-------------------|---------------------------|-----------------------|-------------|
|  Cafés, Restaurants & Bars           | 2,019             | 4.8%                      | 5.5%                  | 14.4%       |
|  Clothing & Footwear                 | 726               | 29.0%                     | -1.1%                 | 5.2%        |
|  Department Stores                   | 893               | 50.4%                     | 1.0%                  | 6.4%        |
|  Fuel & Service Stations             | 1,412             | 5.9%                      | 9.6%                  | 10.1%       |
|  Furniture, Appliances & Electronics | 858               | 28.8%                     | 5.3%                  | 6.1%        |
|  Health Goods & Services             | 690               | 1.3%                      | 6.1%                  | 4.9%        |
|  Home & Building Supplies            | 867               | 25.8%                     | 3.2%                  | 6.2%        |
|  Books & Stationery Stores           | 178               | 27.7%                     | -1.0%                 | 1.3%        |
|  Liquor Stores                       | 392               | 27.4%                     | 6.1%                  | 2.8%        |
|  Recreation & Entertainment          | 573               | 5.5%                      | 4.7%                  | 4.1%        |
|  Supermarkets & Food Retailers       | 4,507             | 9.2%                      | 2.8%                  | 32.2%       |
|  Travel & Accommodation             | 877               | -5.4%                     | 8.7%                  | 6.3%        |
|  <b>TOTAL RETAIL SPEND</b>         | <b>13,991</b>     | <b>12.0%</b>              | <b>4.3%</b>           | <b>100%</b> |

## Quarterly spend by category (\$M)



## Change vs last year



## Selected regions of interest

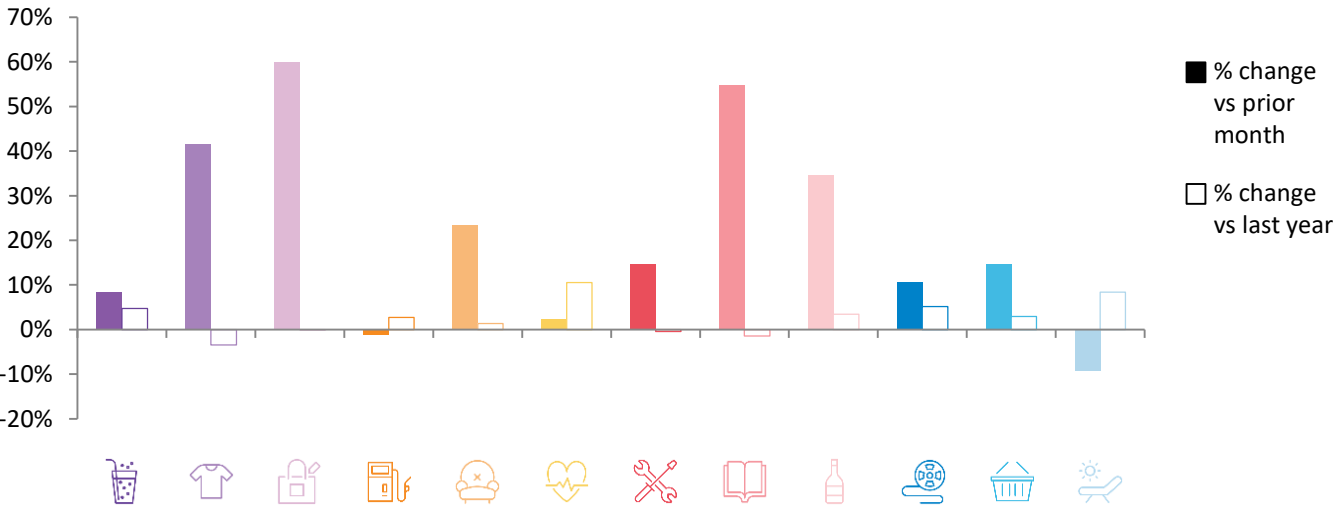
December 2018

### Monthly trends for Auckland

Retail spend in the Auckland region for the 28 days ending 28 December 2018 was \$1.76 billion. This represents increases in spend of 14.7% from the previous month and 2.9% year-on-year.

Retail spending in the Auckland region was up in eight categories compared to December of last year. The greatest increase in year-on-year spend was seen in the Health Goods & Services category, up 10.5%, while the Clothing & Footwear category had the largest decline, down 3.5%.

Compared to November, ten of the twelve categories experienced an increase in spend. Three categories saw large increases; Department Stores (+59.9%), Books & Stationery Stores (+54.9%) and Clothing & Footwear (+41.6%).

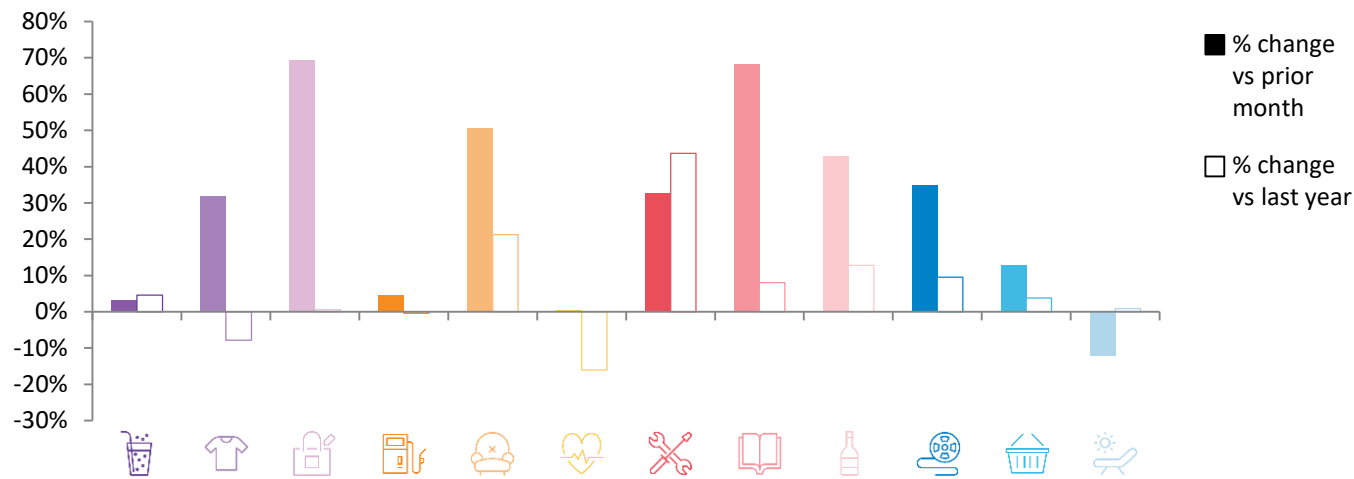


Monthly trends for Gisborne

Retail spend in the Gisborne region for the 28 days ending 28 December 2018 was \$42.2 million. This represents an increase of 19.0% against the previous month and an increase of 5.2% year-on-year.

Compared to December 2017, spending was up in nine of the twelve categories. The Home & Building Supplies had the largest increase, up 43.6%, and at the other end of the scale, the Health Goods & Services category had the greatest decrease, dropping 16.1%.

Month-on-month spend was up in eleven categories. Like Auckland, the largest increases for Gisborne were seen in Department Stores (+69.2%), Books & Stationery Stores (+68.2%) and Furniture, Appliances & Electronics (+50.5%). The only drop in spending was in the Travel & Accommodation category, down by 12.2%.

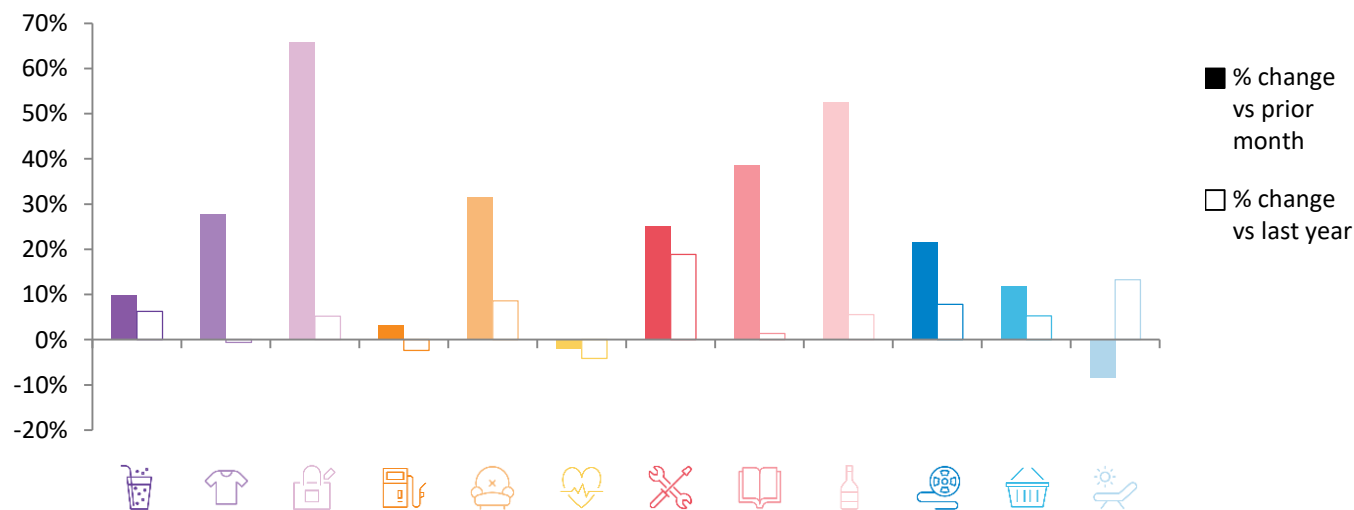


Monthly trends for Southland

Retail spend in the Southland region for the 28 days ending 28 December 2018 was \$91.4 million. This represents an increase of 18.1% against the previous month and an increase of 5.2% year-on-year.

Compared to December 2017, spending was up in nine of the twelve categories. The increases and decreases follow Gisborne, with the Home & Building Supplies up 18.8% and the Health Goods & Services category down 4.2%.

Month-on-month spend was up in ten categories. The largest increases for Southland were seen in the Department Stores (+65.9%) and Liquor Stores (+52.5%) categories. The largest drop in spending was in the Travel & Accommodation category, down by 8.6%.



## Going up this month

The greatest increase in spending this month was seen in the Department Stores category, up 60.4%.

The Gisborne region experienced the greatest increase in spend this month, up 19.0% from November 2018.

**10**

Categories up

**16**

Regions up

## Going down this month

The largest decrease in spending this month was seen in the Travel & Accommodation category, down 10.1%.

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

**2**

Categories down

**0**

Regions down

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## 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 28/12/2018

Total online retail spend in New Zealand for the 28 days ending 28 December 2018 was \$492 million. This represents an increase of 11.7% year-on-year and a decrease of 10.7% 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 seventh month in a row, up 70.4%. The only decrease year-on-year was in the Books & Stationery Stores category, declining 8.2%.

Month-on-month, just two categories experienced increases in spend. These increases were seen in the Liquor Stores (+11.5%) and Books & Stationery Stores (+2.7%) categories. Of the eight decreases month-on-month, the Clothing & Footwear category was down 16.9%, and the Travel & Accommodation category dropped 16.1%.

| Online Retailer Category   |                                     | Month<br>Total \$M | % Change vs<br>Prior Month | % Change vs<br>Last Year | % Share     |
|--|-------------------------------------|--------------------|----------------------------|--------------------------|-------------|
|  | Clothing & Footwear                 | 42.9               | -16.9%                     | 10.3%                    | 8.7%        |
|  | Department Stores                   | 25.4               | -5.1%                      | 39.0%                    | 5.2%        |
|  | Furniture, Appliances & Electronics | 50.7               | -2.3%                      | 23.0%                    | 10.3%       |
|  | Health Goods & Services             | 10.0               | -13.9%                     | 1.8%                     | 2.0%        |
|  | Home & Building Supplies            | 7.0                | -13.1%                     | 70.4%                    | 1.4%        |
|  | Books & Stationery Stores           | 11.0               | 2.7%                       | -8.2%                    | 2.2%        |
|  | Liquor Stores                       | 5.7                | 11.5%                      | 11.0%                    | 1.1%        |
|  | Recreation & Entertainment          | 102.1              | -6.2%                      | 7.3%                     | 20.7%       |
|  | Supermarkets & Food Retailers       | 49.6               | -5.9%                      | 24.3%                    | 10.1%       |
|  | Travel & Accommodation              | 187.9              | -16.1%                     | 6.8%                     | 38.2%       |
|  | <b>Total Online Retail Spend</b>    | <b>492.2</b>       | <b>-10.7%</b>              | <b>11.7%</b>             | <b>100%</b> |

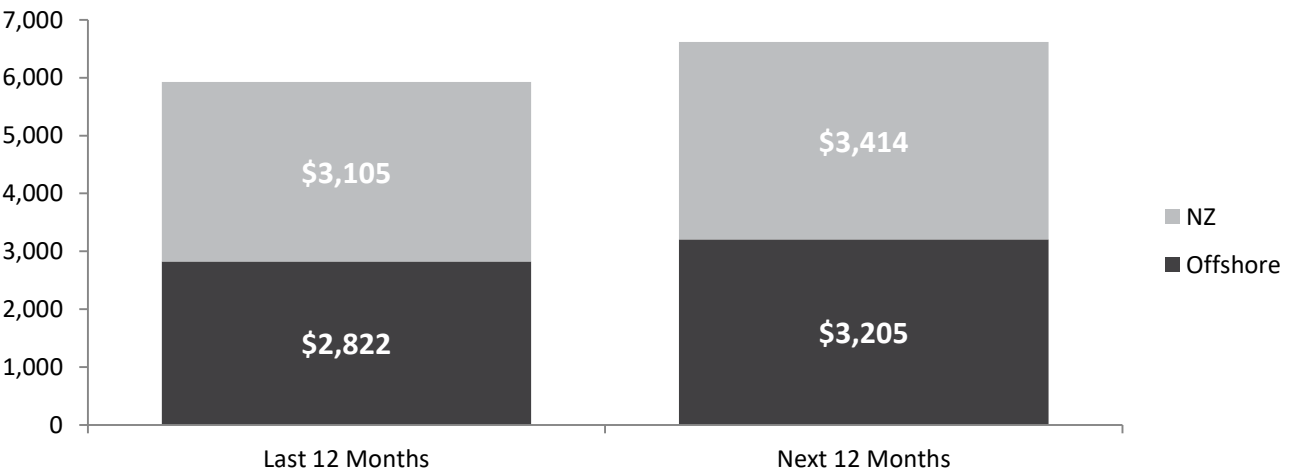
# Online: New Zealand vs Off Shore

New Zealand merchants accounted for 53.6% of online spend for the month of December. This was a decrease of 11.2% compared to the previous month and an increase of 16.9% compared to the previous year.

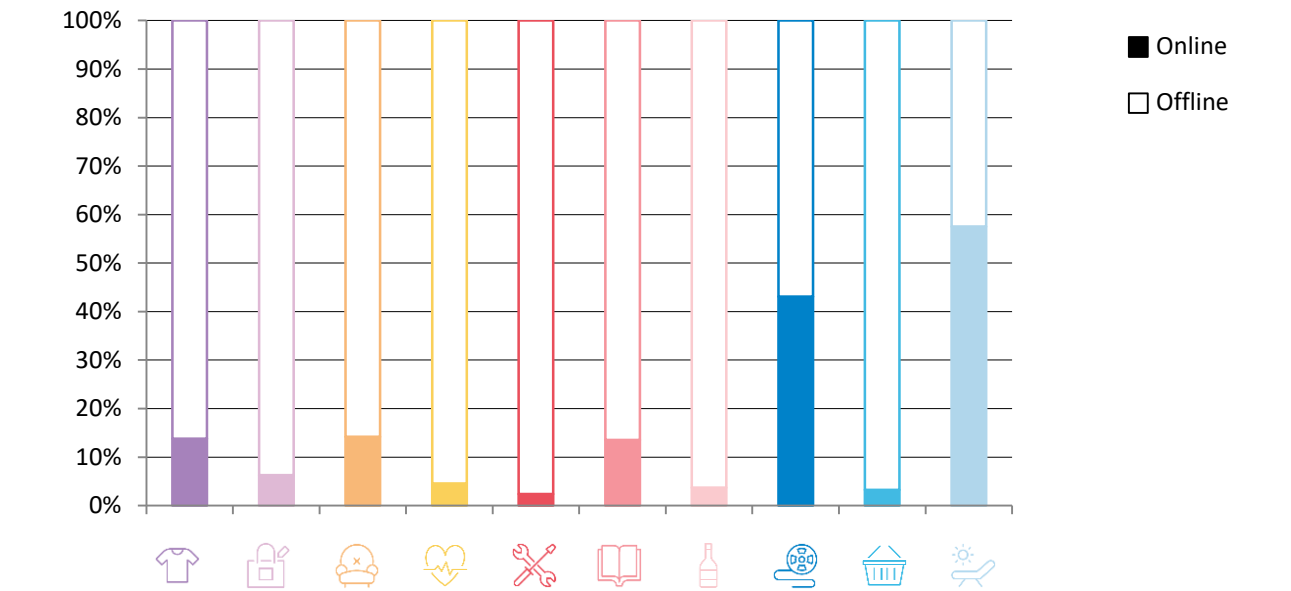
For New Zealand merchants, only three of the ten categories saw increases in spend compared to November, with the Department Stores category experiencing the greatest increase in spend, up 9.8%. The Travel & Accommodation category had the biggest decrease in online spend, dropping 21.4%. New Zealand merchants saw increases in nine categories when compared to December 2017.

Spend at offshore retail merchants decreased by 10.1% when compared to the previous month and increased 6.3% when compared to the same period last year. Offshore merchants saw spend increases in six categories year-on-year; the Department Stores category continues to increase, up a whopping 224.1%, while the greatest decrease was seen in the Health Goods & Services category, down 12.9%.

## Projected total online spend (\$M)














## % share of category spend



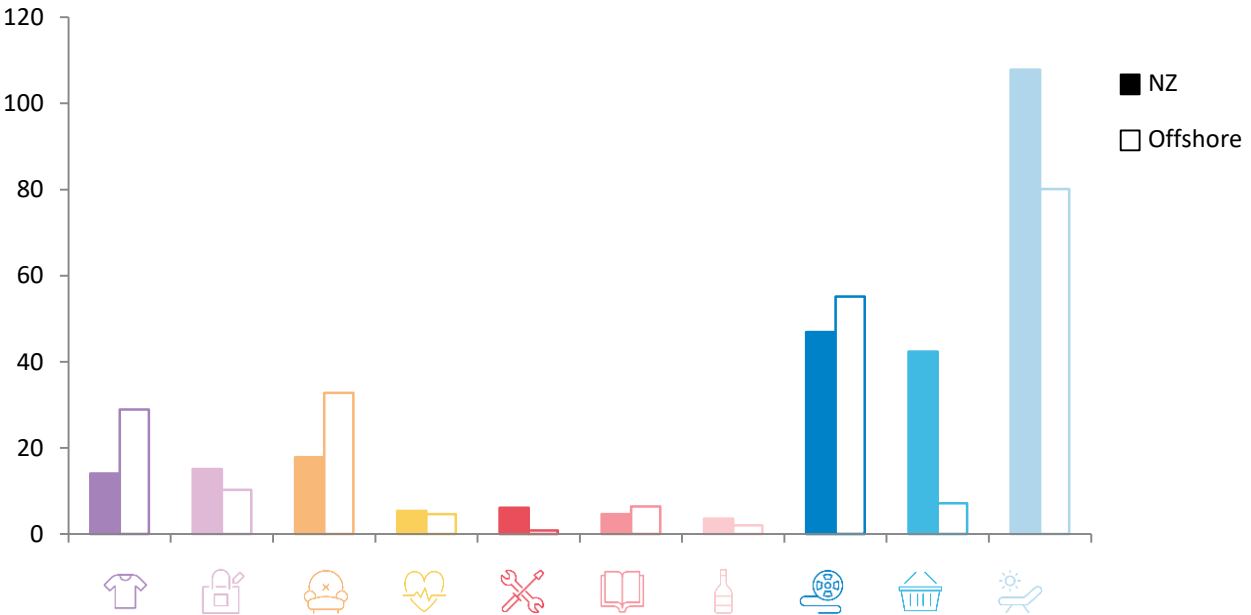


# Online retail market summary New Zealand vs Offshore merchants

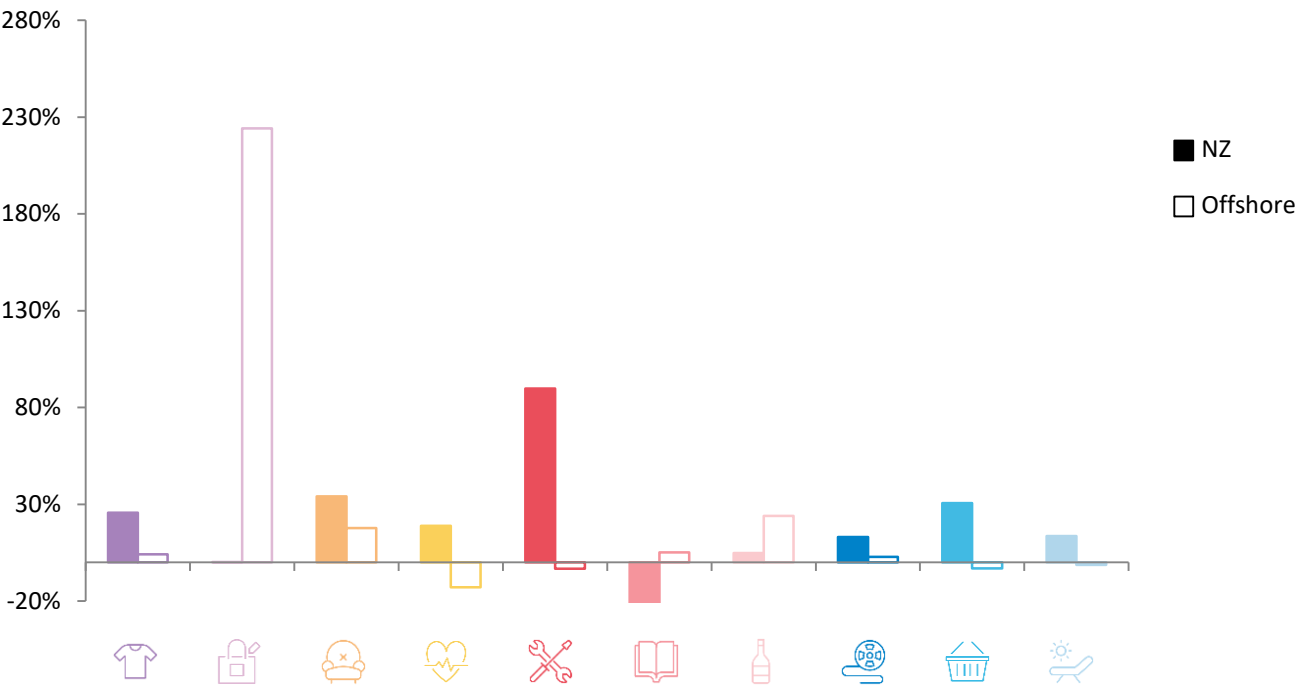
December 2018

| Retailer Category  | Month Total \$M |              | % Change vs Prior Month |               | % Change vs Last Year |             |
|--|-----------------|--------------|-------------------------|---------------|-----------------------|-------------|
|  | NZ              | Off Shore    | NZ                      | Off Shore     | NZ                    | Off Shore   |
|  Clothing & Footwear                 | 14.0            | 28.9         | -10.8%                  | -19.6%        | 25.7%                 | 4.1%        |
|  Department Stores                   | 15.1            | 10.3         | 9.8%                    | -20.8%        | 0.1%                  | 224.1%      |
|  Furniture, Appliances & Electronics | 17.8            | 32.8         | -2.9%                   | -2.0%         | 34.1%                 | 17.7%       |
|  Health Goods & Services             | 5.4             | 4.6          | -3.4%                   | -23.5%        | 18.9%                 | -12.9%      |
|  Home & Building Supplies            | 6.1             | 0.8          | -10.0%                  | -30.9%        | 89.8%                 | -3.3%       |
|  Books & Stationery Stores           | 4.6             | 6.4          | 8.1%                    | -0.8%         | -22.0%                | 5.2%        |
|  Liquor Stores                       | 3.6             | 2.0          | 8.4%                    | 17.4%         | 4.8%                  | 24.0%       |
|  Recreation & Entertainment          | 46.9            | 55.2         | -0.4%                   | -10.7%        | 13.0%                 | 2.8%        |
|  Supermarkets & Food Retailers       | 42.4            | 7.1          | -6.1%                   | -4.6%         | 30.6%                 | -3.2%       |
|  Travel & Accommodation              | 107.8           | 80.1         | -21.4%                  | -7.7%         | 13.6%                 | -1.2%       |
|  <b>Total Retail Spend</b>          | <b>263.9</b>    | <b>228.3</b> | <b>-11.2%</b>           | <b>-10.1%</b> | <b>16.9%</b>          | <b>6.3%</b> |

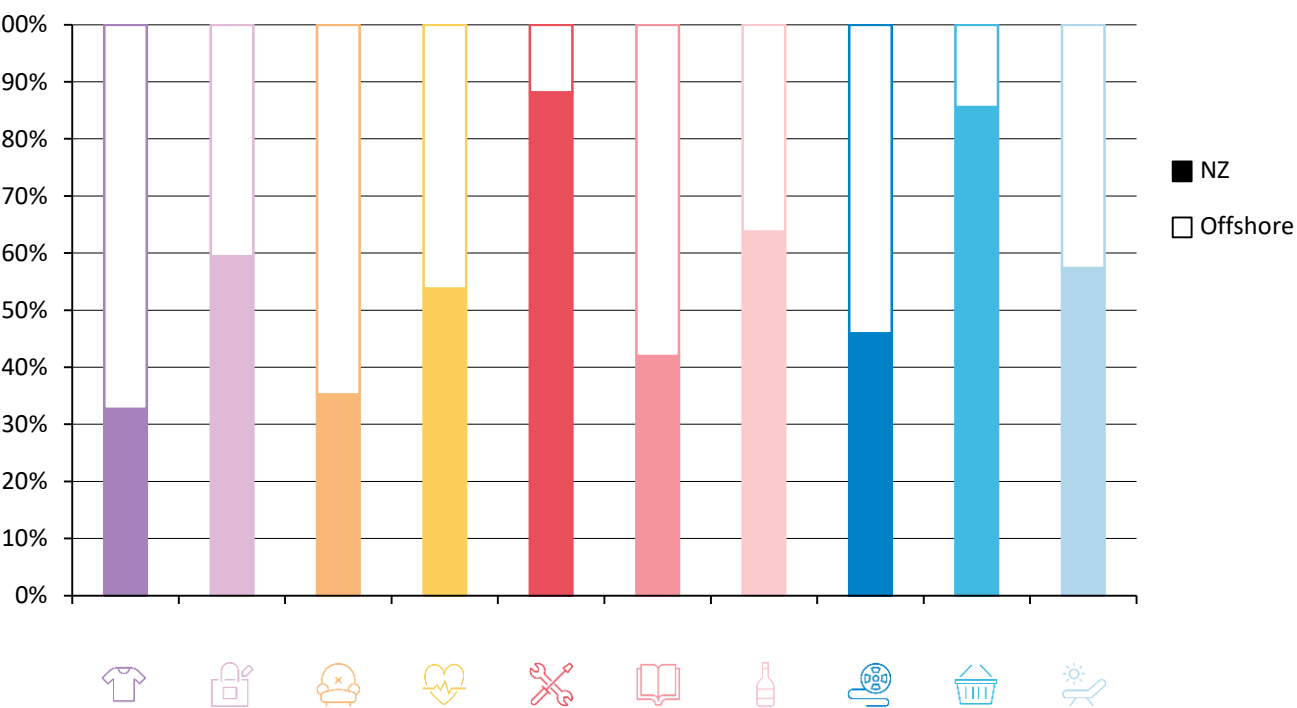
## Online retailer total revenue by category (\$M)



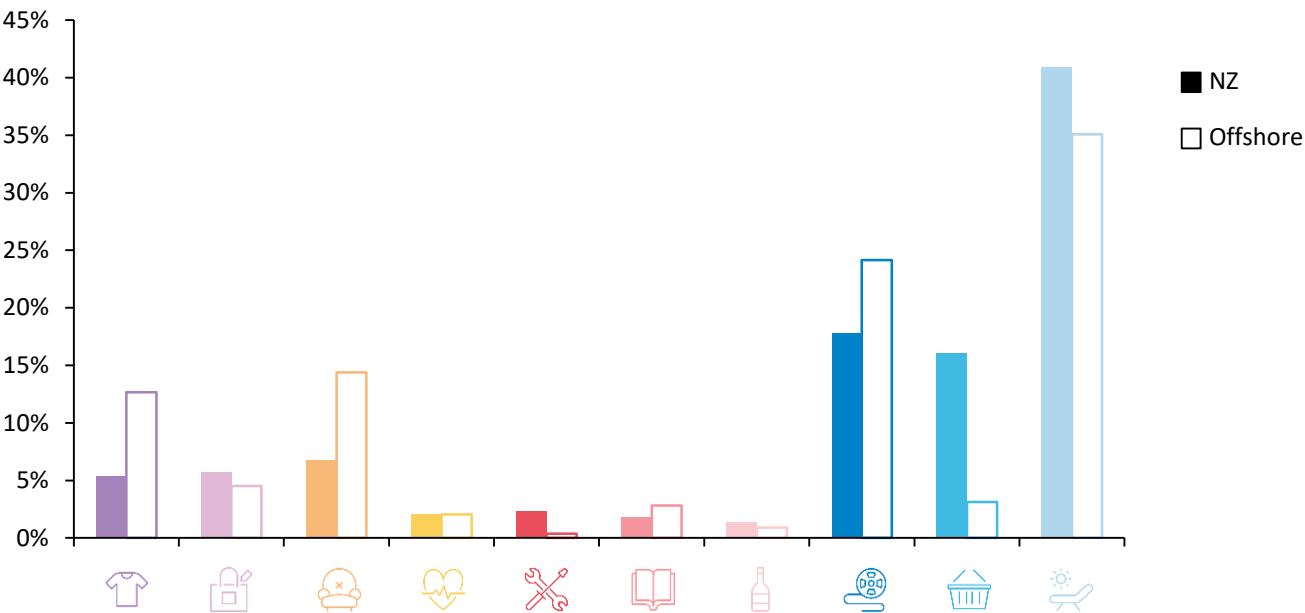
# Monthly online revenue change YOY



# 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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