

NEW ZEALAND ONLINE RETAIL SALES REPORT

AUGUST 2020

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CHANGE IN ONLINE SPENDING

TOTAL SPENDING
VS. LAST YEAR

27.1%

SPEND AT DOMESTIC
SITES VS. LAST YEAR

50.8%

SPEND AT INT'L SITES
VS. LAST YEAR

-6.2%

CATEGORY CHANGE VS. AUGUST 2019

20%	Groceries & Liquor (incl health food and supplements)
93%	Furniture, Housewares and Hardware
25%	Electrical & Electronic goods (incl computers & appliances)
25%	Recreation, Toys, Games, Entertainment media, Books
36%	Clothing, Footwear and Accessories
17%	Variety, Department and Other*
33%	Pharmacy, Cosmetics, Stationery, Antiques, Flowers

EXCHANGE RATES

vs. LAST YEAR (average)

USD \$

2.5%

GBP £

-3.5%

AUD \$

-3.5%

MONTH IN REVIEW

What a difference a month can make. Just when the retail landscape was heading back to a state of relative normality, another wave of lockdowns reversed the recent trend. New Zealander's online spending was up 27.1% compared to August last year (July saw just a 2.8% increase on July 2019). For the August Quarter, spending was up 14.2%.

In a similar result, our online spending this August was up 23.8% on July. It's no surprise really that when most retail's doors are closed in our largest city, that consumers will look online for their wants and needs.

All the categories we measure experienced a rise in spending. Leading the growth rates was the Furniture, Housewares and Hardware category, with spending up 93% on August last year. In the original Lockdown period we noticed this online category perform very strongly also. Perhaps as another round of Lockdowns begun, those of us that didn't kit out the new 'home-office' have now needed to. The Groceries & Liquor category also performed strongly, up 20% on last year, and up 28% on July. The thought of lining up for entry into the Supermarkets possibly putting off a few would-be-shoppers.

Growth Rates	Total Online			Domestic Online Purchases			International Online Purchases		
	Jun-20	Jul-20	Aug-20	Jun-20	Jul-20	Aug-20	Jun-20	Jul-20	Aug-20
Month ended >>>									
Monthly spending vs Same month prior year	14%	2%	27%	32%	15%	51%	-11%	-18%	-6%
3-monthly average vs Same period prior year	38%	23%	14%	72%	47%	33%	-9%	-12%	-11%

Online sales data is produced by Marketview. Traditional retail sales data is from Statistics New Zealand quarterly releases. For both data sets, the figures we use correspond to Statistics New Zealand's ANZSIC Division G (Retail Trade) excluding fuel, motor vehicles and parts, and marine. The annual value of official retail sales in the categories we monitor is approximately \$50 billion. Exchange rates are sourced from Interest.co.nz

*Categories included in the Online Retail Sales Report are: supermarket and grocery stores; specialised food and liquor; furniture, floor coverings, houseware and textile goods; electrical and electronic goods; hardware, building and garden supplies; recreational goods; clothing, footwear and personal accessories; department stores; pharmaceutical and other store-based retailing; non-store retailing; and retail commission-based buying and/or selling.

*Note: "Other" includes unclassified stores and specialty stores that don't neatly fit into defined ANZSIC categories. Unclassified Trade Me spending (the estimated "retail" component) is included with Department Store spending.



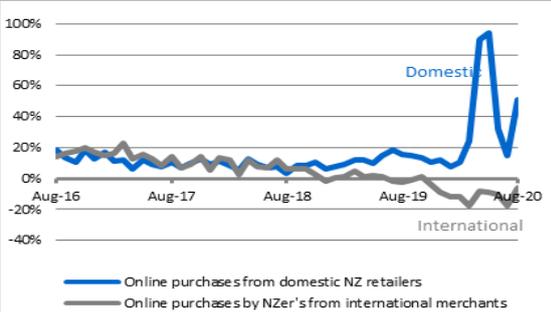
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Financial

Marketview

SUPPLEMENTARY CHARTS | AUGUST 2020

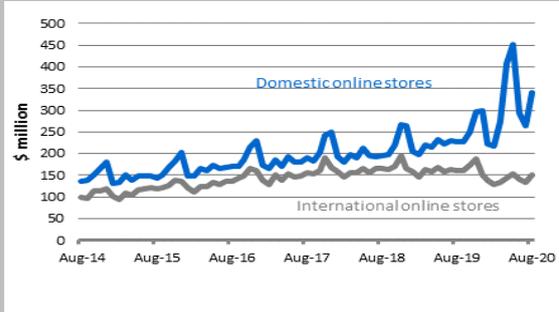
Growth in NZ online sales by retailer location

Monthly spending compared to the same month in prior year



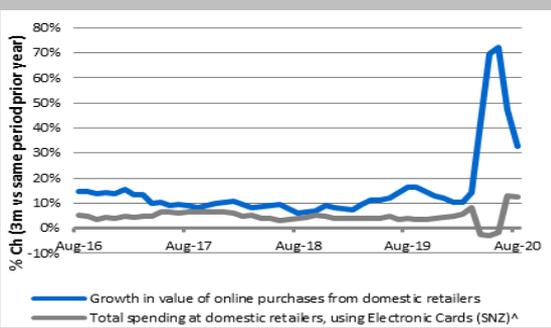
Monthly Online Retail spending by New Zealanders

\$ million

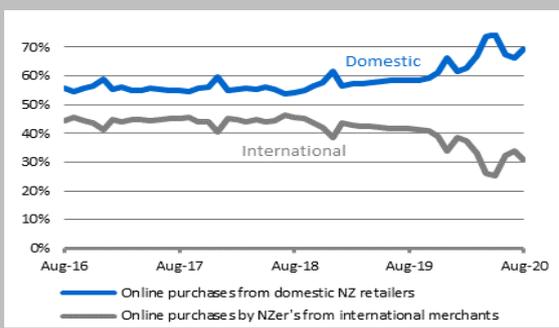


NZ Domestic Online vs SNZ Electronic Card Transactions^

3-monthly spending compared to same period in prior year

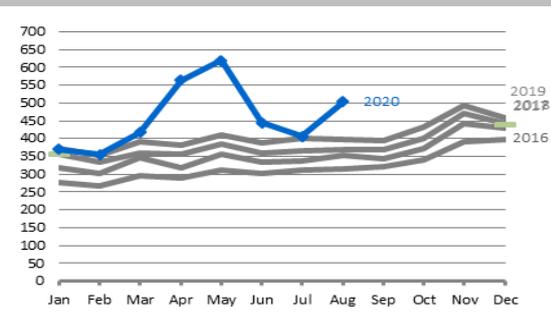


Monthly share of NZ Online Retail Sales, by retailer location



Index of Total NZ Online Retail Sales

January 2010 = 100



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