



# Retailwatch














## Value of electronic card transactions within retail categories

Period ending 28/08/2018

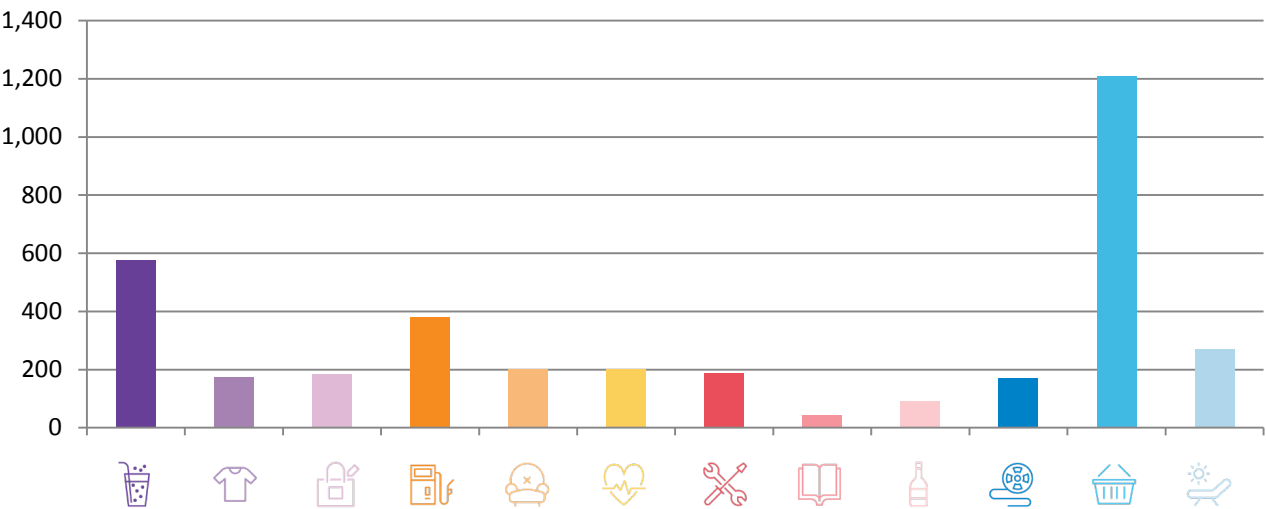
Total retail spend in New Zealand for the 28 days ending 28 August 2018 was \$3.7 billion. This was a decrease of 0.2% compared to July and an increase of 2.6% when compared to the same period last year.

Spending was up in eight categories year-on-year; similar to July, Fuel & Service Stations saw the greatest increase, up 11.7%, and Supermarkets & Food Retailers follow with an increase of 10.2%. Books & Stationery Stores had the greatest decrease year-on-year down 4.2%, followed by the Clothing & Footwear, down 3.0%.

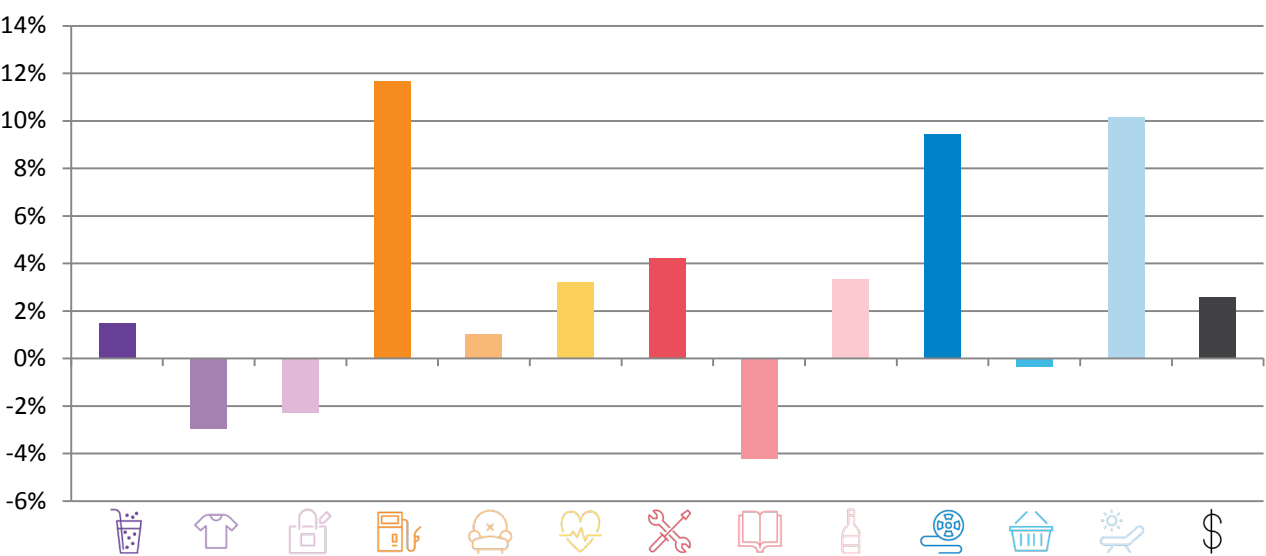
Month-on-month, six of the twelve categories experienced increases in spend. The Home & Building Supplies category increased by 4.2%, slightly ahead of Fuel & Service Stations (+4.0%). Of the six categories decreasing in spend month-on-month, the largest decrease in spend was seen in Department Stores category (-8.8%).

Retailer Category	Month Total \$M	% Change vs Prior Month	% Change vs Last Year	% Share
 Cafés, Restaurants & Bars	564	-1.9%	1.5%	15.4%
 Clothing & Footwear	159	-8.1%	-3.0%	4.3%
 Department Stores	166	-8.8%	-2.3%	4.5%
 Fuel & Service Stations	394	4.0%	11.7%	10.8%
 Furniture, Appliances & Electronics	194	-2.6%	1.0%	5.3%
 Health Goods & Services	206	1.5%	3.2%	5.6%
 Home & Building Supplies	195	4.2%	4.2%	5.3%
 Books & Stationery Stores	41	-4.3%	-4.2%	1.1%
 Liquor Stores	90	0.5%	3.3%	2.5%
 Recreation & Entertainment	158	-5.5%	9.4%	4.3%
 Supermarkets & Food Retailers	1,229	1.8%	-0.4%	33.5%
 Travel & Accommodation	272	0.9%	10.2%	7.4%
 <b>TOTAL RETAIL SPEND</b>	<b>3,669</b>	<b>-0.2%</b>	<b>2.6%</b>	<b>100%</b>

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



## Change vs last year



## Quarterly summary

### August 2018














The total quarterly retail spend for the 91 days ending 28 August 2018 was \$12 billion. This was a decrease of 2.3% when compared to the previous quarter and an increase of 1.8% when compared to the same period last year.

Similar to July, four of the twelve categories experienced increases in spend when compared to the previous quarter. The Recreation & Entertainment category had the greatest rise in spending (+2.0%) while the largest decrease in spend since last quarter was seen in the Clothing & Footwear category (-7.1%), with the Home & Building Supplies following behind, decreasing by 5.4%.

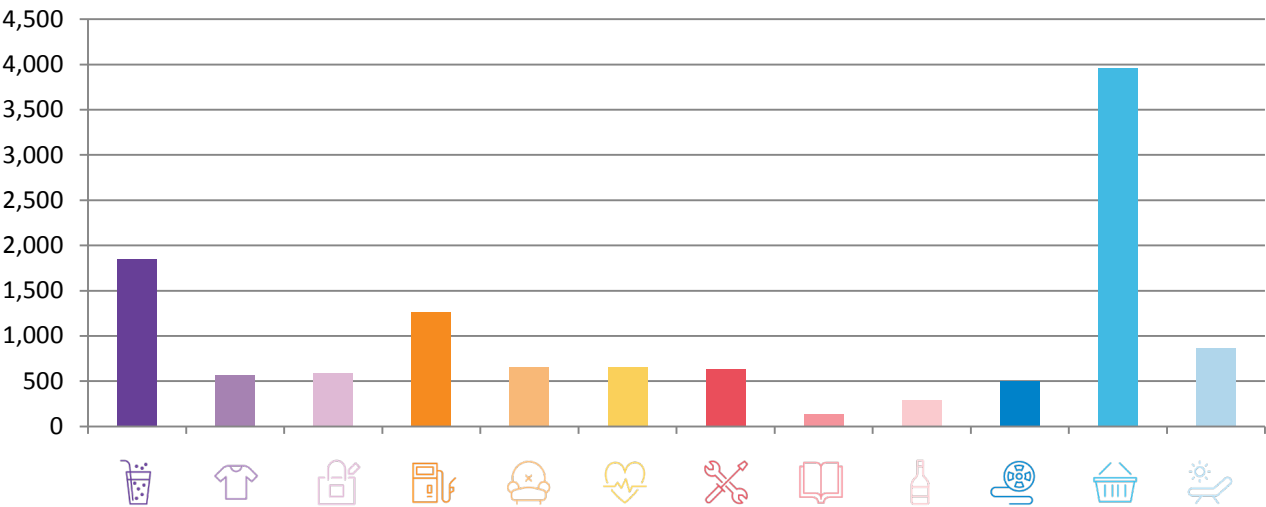
Compared to the same quarter of the previous year, spending increased in seven of the twelve categories. Similar to June and July, the Fuel & Service Station category had the greatest increase, up 11.5%. The largest decrease was seen in the Clothing & Footwear category, decreasing by 3.9%.

# Quarterly summary

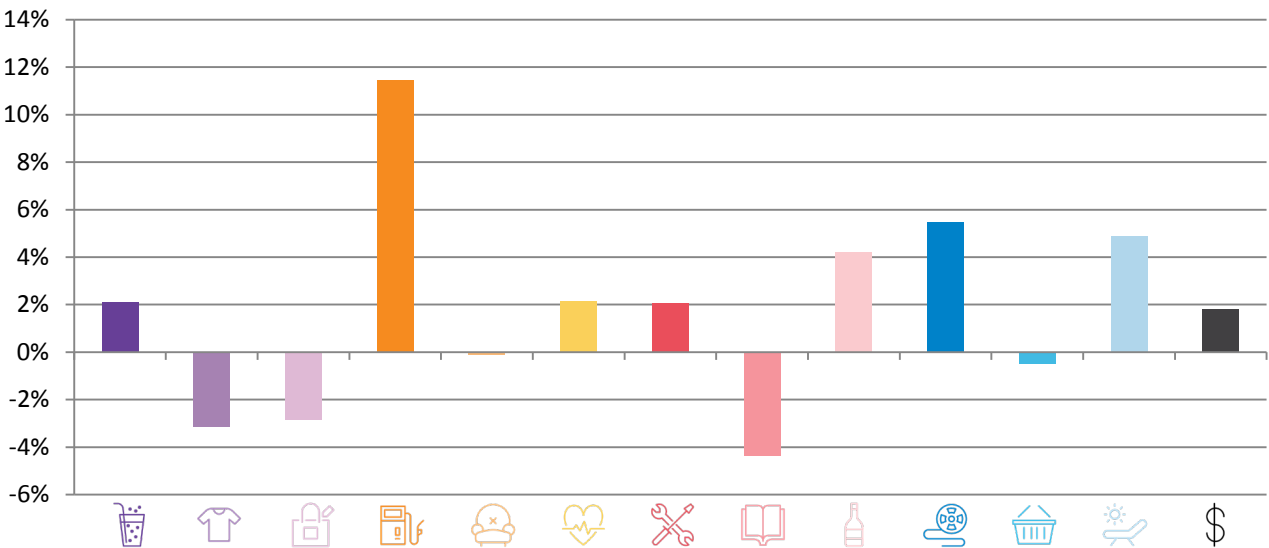
August 2018

Retailer Category	Quarter Total \$M	% Change vs Prior Quarter	% Change vs Last Year	% Share
 Cafés, Restaurants & Bars	1,843	-1.7%	2.1%	15.4%
 Clothing & Footwear	572	-7.1%	-3.1%	4.8%
 Department Stores	591	-4.7%	-2.9%	4.9%
 Fuel & Service Stations	1,269	0.0%	11.5%	10.6%
 Furniture, Appliances & Electronics	653	0.6%	-0.1%	5.4%
 Health Goods & Services	660	1.3%	2.2%	5.5%
 Home & Building Supplies	634	-5.4%	2.1%	5.3%
 Books & Stationery Stores	135	0.1%	-4.4%	1.1%
 Liquor Stores	295	-4.5%	4.2%	2.5%
 Recreation & Entertainment	506	2.0%	5.5%	4.2%
 Supermarkets & Food Retailers	3,960	-2.7%	-0.5%	33.0%
 Travel & Accommodation	870	-3.8%	4.9%	7.3%
 <b>TOTAL RETAIL SPEND</b>	<b>11,986</b>	<b>-2.3%</b>	<b>1.8%</b>	<b>100%</b>

## Quarterly spend by category (\$M)



## Change vs last year



## Selected regions of interest

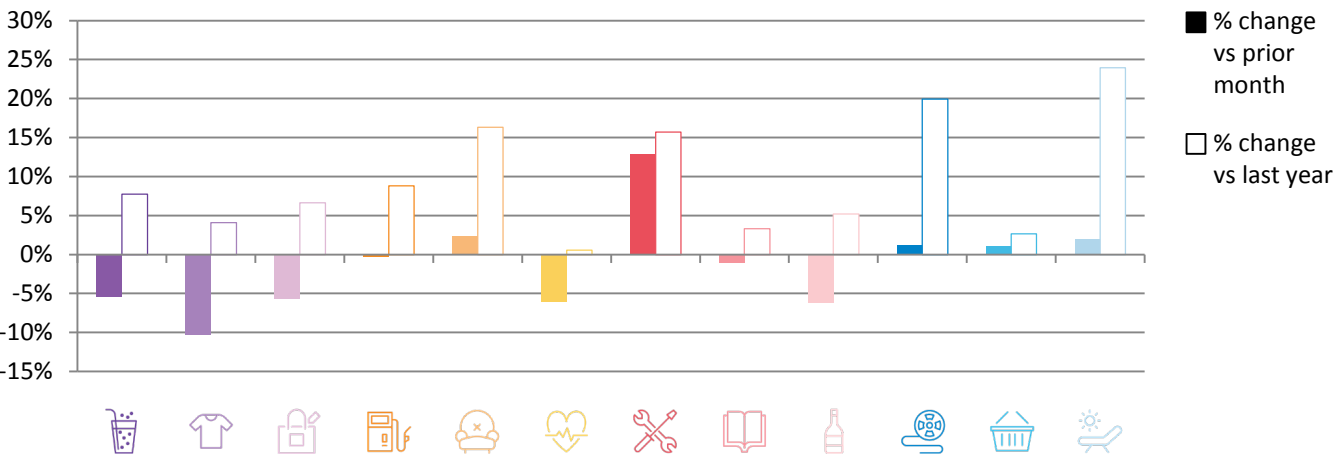
August 2018

### Monthly trends for Gisborne

Retail spend in the Gisborne region for the 28 days ending 28/08/2018 was \$32.2 million. This represents a decrease in spend of 0.8% from the previous month and an increase of 7.3% year-on-year.

Retail spending in the Gisborne region was up all twelve categories compared to August last year. The greatest increase in year-on-year spend was seen in the Travel & Accommodation category, up 24.0%. Recreation & Entertainment and Furniture, Appliance & Electronics followed behind with increases of 19.9% and 16.3% respectively.

Compared to July, five of the twelve categories experienced an increase in spend. The Home & Building Supplies category increased by 12.8%, while the Clothing & Footwear category decreased by 10.4%.

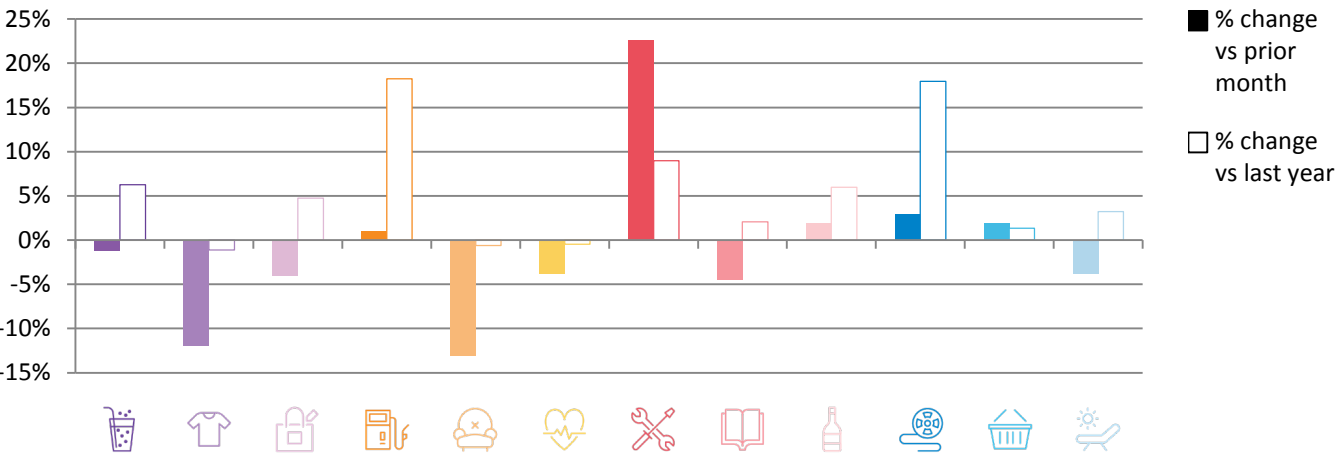


Monthly trends Nelson

Retail spend in the Nelson region for the 28 days ending 28/08/2018 was \$37.6 million. This represents a decrease of 4.5% against the previous month and an increase of 4.5% year-on-year.

Compared to August 2017, spending was up in nine of the twelve categories, with two large increases in Fuel & Service Stations (+18.2%) and Recreation & Entertainment (+17.9%). The Clothing & Footwear category had the largest decrease in spend when compared to last year, dropping just 1.1%.

Month-on-month spend was also up in five categories. The Home & Building Supplies category took the lead, increasing by 22.6%. The greatest drop in spending was in the Furniture, Appliances & Electronics category, decreasing by 13.0%.

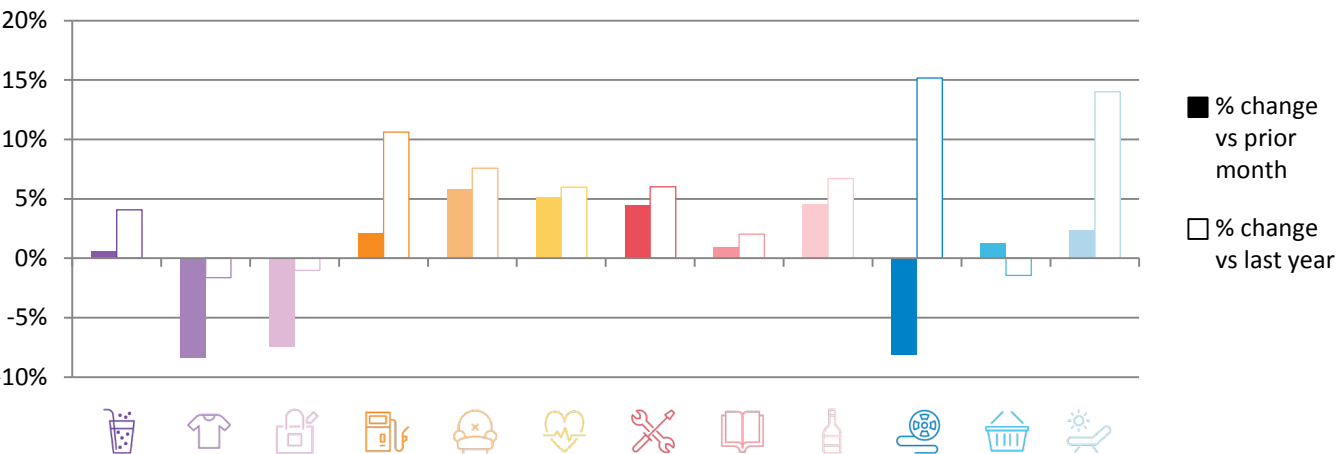


Monthly trends Wellington

Retail spend in the Wellington region for the 28 days ending 28/08/2018 was \$402.7 million. This represents increases of 0.6% against the previous month and 3.6% year-on-year.

Retail spending in the Wellington region increased in nine of the twelve categories year-on-year. The Recreation & Entertainment category saw the greatest increase in spend going up 15.2%, followed by Fuel & Service Stations increasing by 10.6%. There were small decreases in spend when compared to August last year, and the greatest decrease was in the Clothing & Footwear category down 8.4%.

Compared to July, nine categories experienced increases in spend. The Furniture, Appliances & Electronics category increased the most at 5.8% while the Clothing & Footwear category had the greatest decrease down 8.4%.



## Going up this month

The greatest increase in spending this month was seen in the Home & Building Supplies category, up 4.2%.

The Gisborne region experienced the greatest increase this month of 7.3% when compared to July 2018.

## Going down this month

The largest decrease in spending this month was seen in the Department Stores category down 8.8%.

The West Coast region experienced the greatest decrease in spend this month, down 2.2%.

6

Categories up

3

Regions up

13

Categories down

10

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 Westpac Business Insight and is weighted to give national and regional totals



### Disclaimer

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# Online Retailwatch












## Online retail market summary

Period ending 28/08/2018

Total online retail spend in New Zealand for the 28 days ending 28 August 2018 was \$496 million. This represents an increase of 7.7% year-on-year and a decrease of 4.5% from the previous month.

Online spending was up in all ten categories year-on-year. Home & Building Supplies retailers saw the greatest increase in spending for the third month in a row, up 64.3%. Department Stores and Supermarkets & Food Retailers follow behind with increases of 32.4% and 25.9% respectively.

Month-on-month, only two of the ten categories experienced increases in spend. The largest increase in spend was exhibited in the Supermarkets & Food Retailers category up 11.8%, while the largest drop in month-on-month spend was in the Furniture, Appliances & Electronics category, down 8.3%.

Online Retailer Category		Month Total \$M	% Change vs Prior Month	% Change vs Last Year	% Share
	Clothing & Footwear	31.3	-5.4%	1.9%	6.3%
	Department Stores	13.8	0.3%	32.4%	2.8%
	Furniture, Appliances & Electronics	36.3	-8.3%	4.2%	7.3%
	Health Goods & Services	10.9	-6.2%	19.7%	2.2%
	Home & Building Supplies	7.5	-4.0%	64.3%	1.5%
	Books & Stationery Stores	8.5	-4.5%	0.6%	1.7%
	Liquor Stores	3.1	-0.7%	13.5%	0.6%
	Recreation & Entertainment	100.4	-4.7%	3.9%	20.2%
	Supermarkets & Food Retailers	48.5	11.8%	25.9%	9.8%
	Travel & Accommodation	235.5	-6.7%	4.9%	47.5%
	<b>Total Online Retail Spend</b>	<b>495.9</b>	<b>-4.5%</b>	<b>7.7%</b>	<b>100%</b>

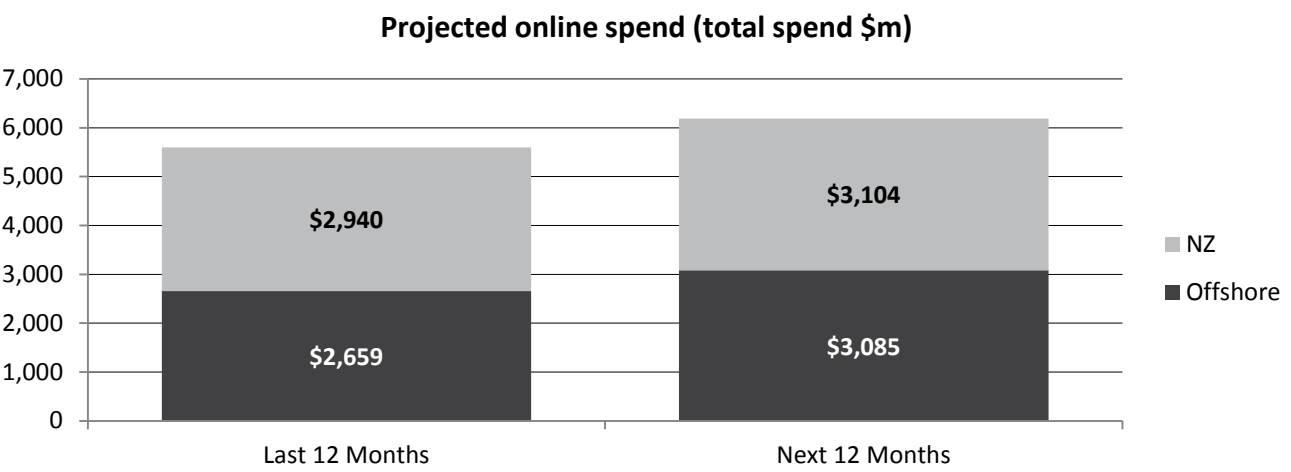
# Online: New Zealand vs Offshore

New Zealand merchants accounted for 54.3% of online spend for the month of August. This was an increase of 5.0% compared to the previous month and 14.5% compared to the previous year.

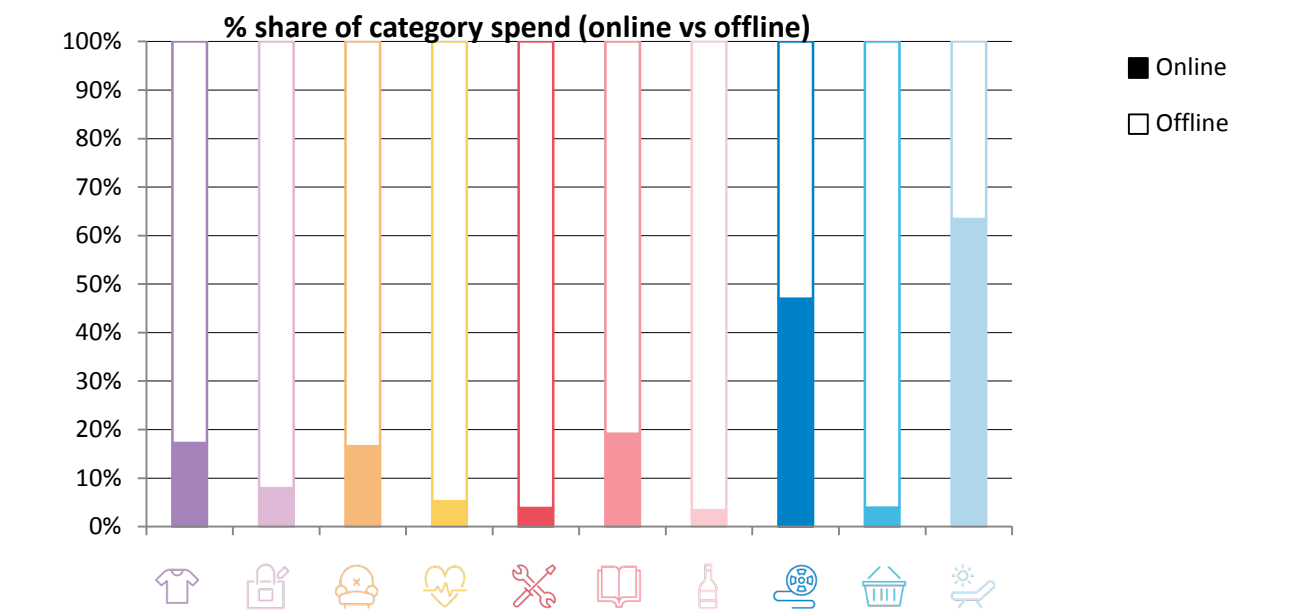
For New Zealand merchants, five of the ten categories saw increases in spend compared to July, with the Supermarkets & Food Retailers category experiencing the greatest increase in spend, going up 14.0%. The Furniture, Appliances & Electronics category saw the biggest decrease in online spend, dropping 4.5%. New Zealand merchants saw increases in seven categories when compared to August 2017.

Spend at offshore retail merchants decreased by 13.7% when compared to the previous month but increased by 0.6% when compared to the same period last year. Offshore merchants saw increases in spend in seven categories year-on-year, the largest seen once again in Department Stores (+183.5%), while the greatest decrease was seen in the Home & Building Supplies category, down 21.7%.

## Projected total online spend (\$M)














## % share of category spend



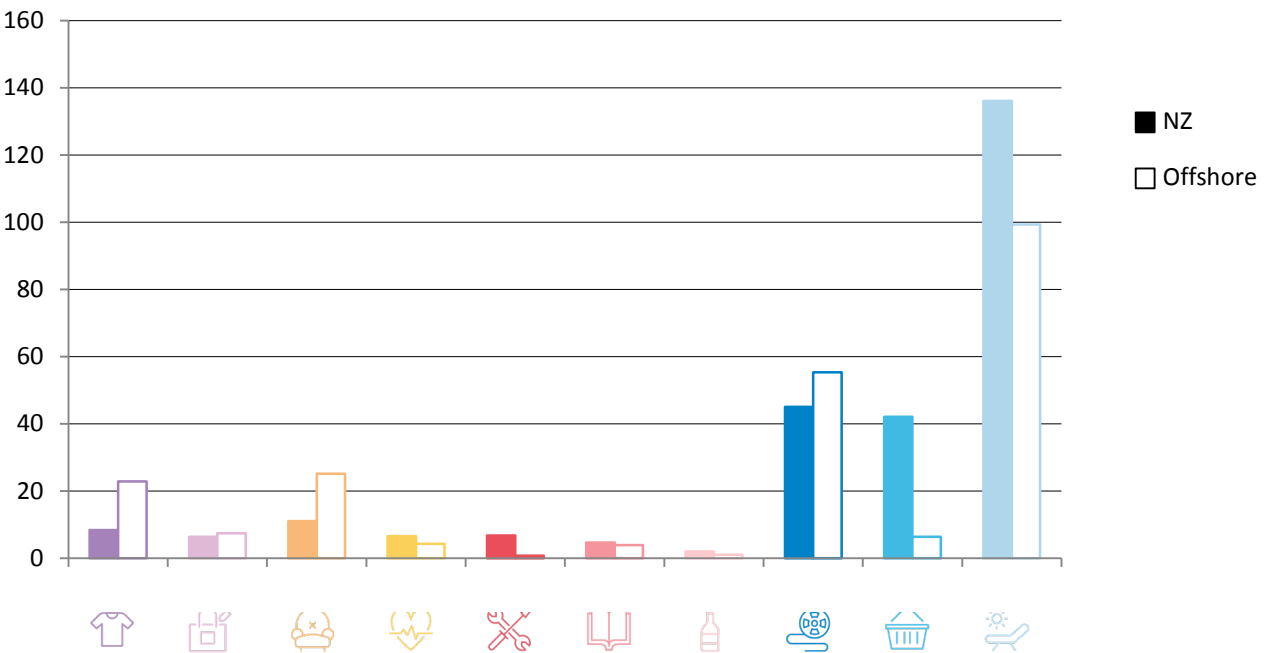


# Online retail market summary New Zealand vs Offshore merchants

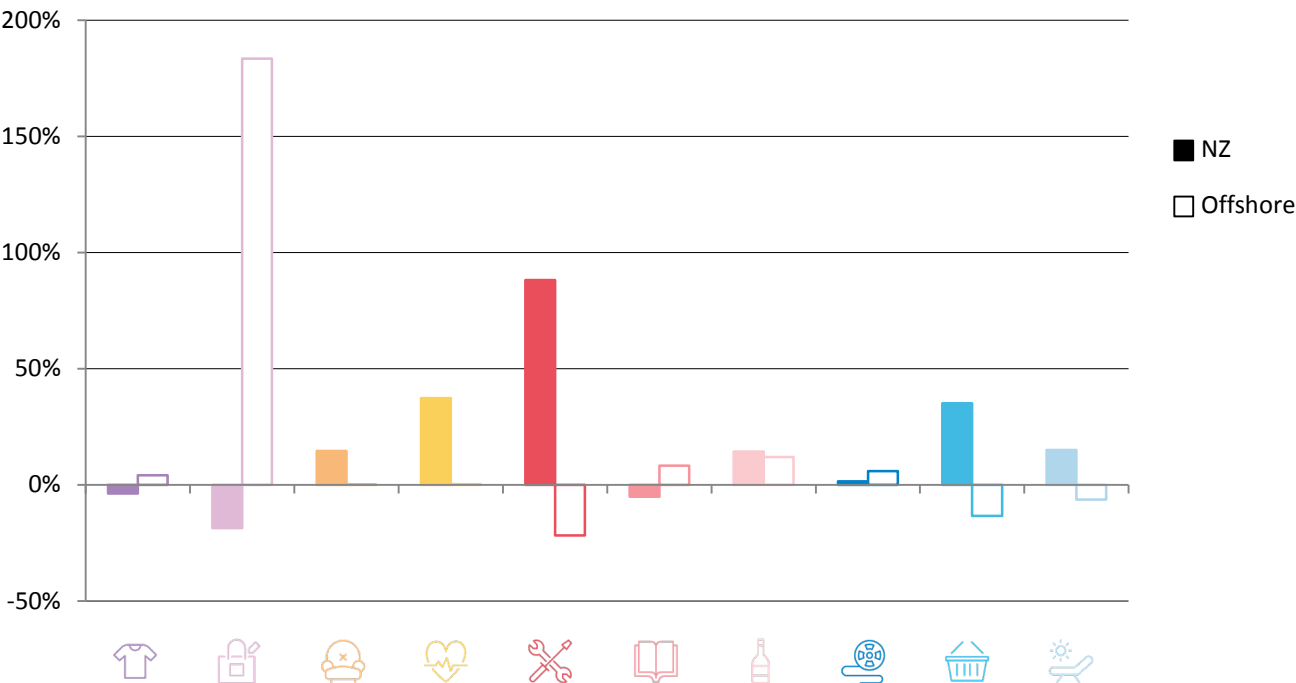
August 2018

Retailer Category	Month Total \$M		% Change vs Prior Month		% Change vs Last Year	
	NZ	Offshore	NZ	Offshore	NZ	Offshore
 Clothing & Footwear	8.5	22.9	-0.2%	-7.2%	-3.7%	4.2%
 Department Stores	6.4	7.5	2.6%	-1.7%	-18.5%	183.5%
 Furniture, Appliances & Electronics	11.1	25.2	-4.5%	-9.9%	14.6%	0.1%
 Health Goods & Services	6.6	4.4	-1.0%	-13.0%	37.3%	0.3%
 Home & Building Supplies	6.8	0.8	-2.5%	-15.3%	88.1%	-21.7%
 Books & Stationery Stores	4.7	3.9	4.0%	-13.1%	-5.0%	8.3%
 Liquor Stores	2.0	1.1	0.1%	-2.0%	14.3%	12.0%
 Recreation & Entertainment	45.1	55.4	-0.6%	-7.8%	1.6%	5.9%
 Supermarkets & Food Retailers	42.1	6.4	14.0%	-0.8%	35.1%	-13.4%
 Travel & Accommodation	136.1	99.3	6.6%	-20.3%	15.1%	-6.4%
 <b>Total Retail Spend</b>	<b>269.2</b>	<b>226.7</b>	<b>5.0%</b>	<b>-13.7%</b>	<b>14.5%</b>	<b>0.6%</b>

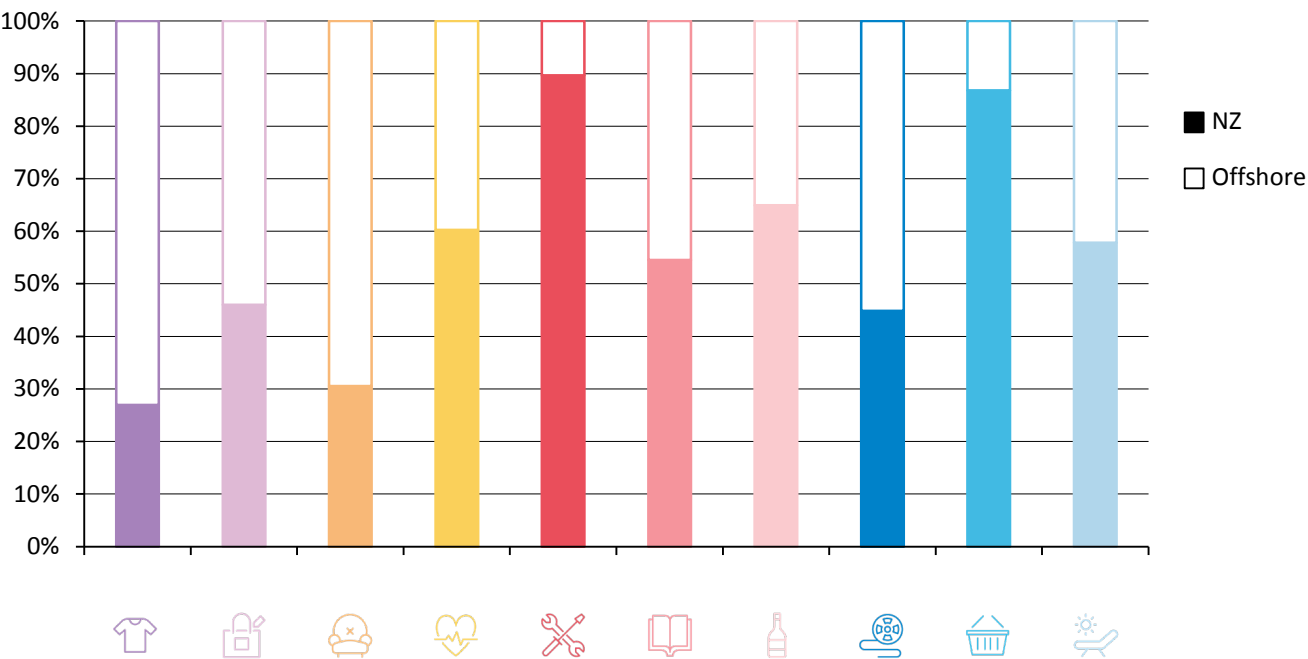
## Online retailer total revenue by category (\$M)



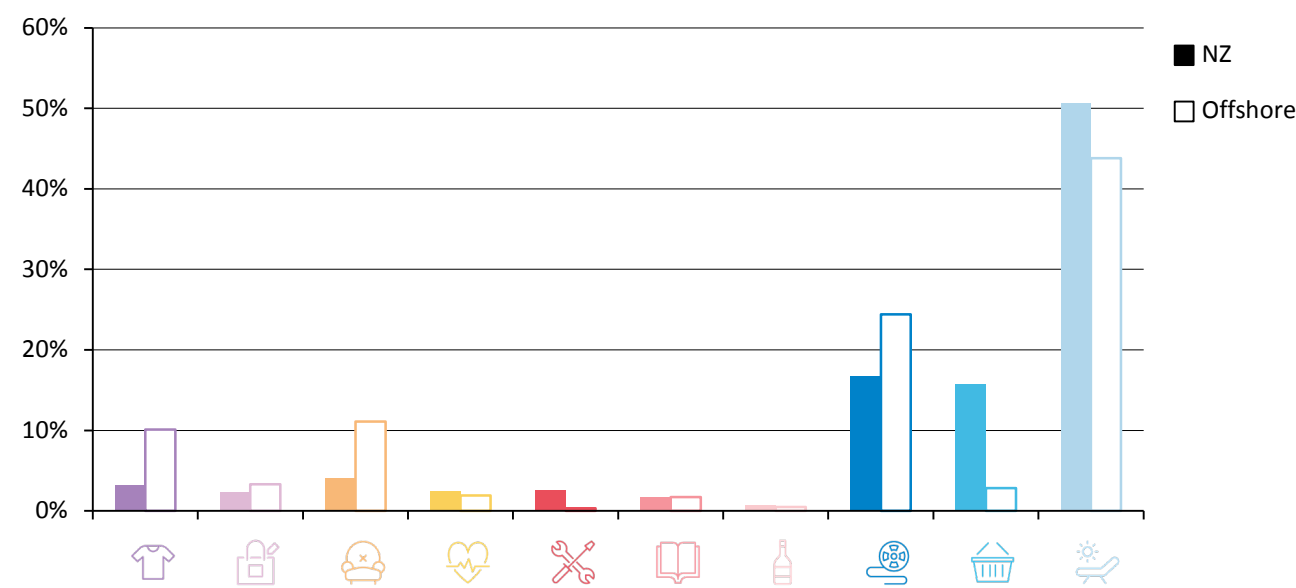
## Monthly online revenue change year-on-year



## 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 Westpac'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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