



Retailwatch

Value of electronic card transactions within retail categories

Period ending 28/09/2018

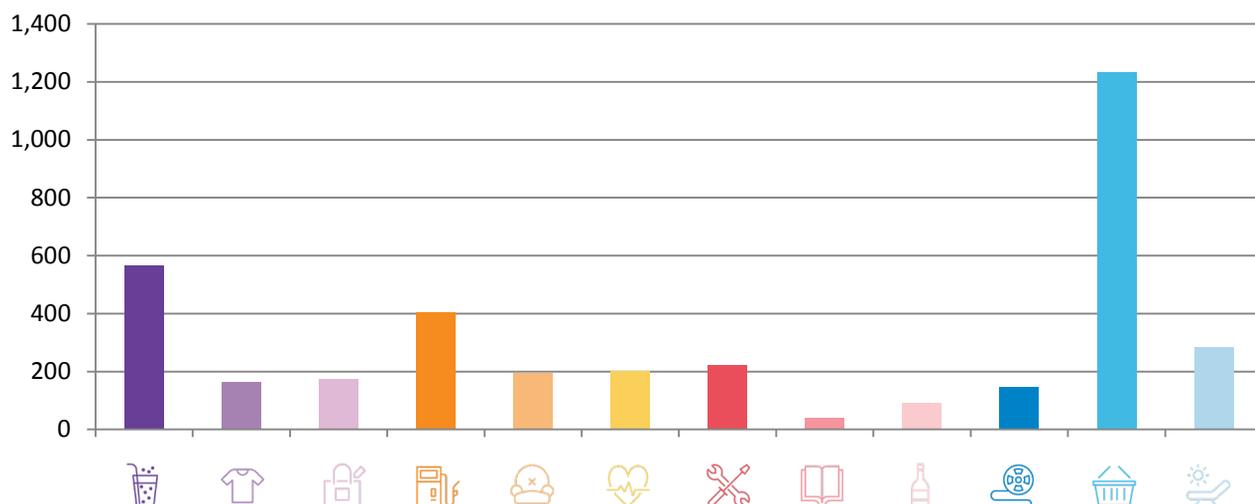
Total retail spend in New Zealand for the 28 days ending 28 September 2018 was \$3.7 billion. This was an increase of 2.7% compared to August and an increase of 1.4% when compared to the same period last year.

Spending was up in six categories year-on-year; Fuel & Service Stations once again saw the greatest increase, up 12.9%, while Travel & Accommodation followed behind with an increase of 8.4%. The largest decreases were seen in Recreation & Entertainment (-7.2%) and Books & Stationery Stores (-4.3%).

Month-on-month, eleven of the twelve categories experienced increases in spend. The Home & Building Supplies category increased the most, up 15.5%, with the Department Stores category following behind with an increase of 6.1%. The only decrease seen this month was in the Recreation & Entertainment category down 5.0%.

Retailer Category	Month Total \$M	% Change vs Prior Month	% Change vs Last Year	% Share
 Cafés, Restaurants & Bars	566	1.2%	1.3%	15.2%
 Clothing & Footwear	166	5.6%	-3.1%	4.4%
 Department Stores	174	6.1%	-3.4%	4.7%
 Fuel & Service Stations	403	3.0%	12.9%	10.8%
 Furniture, Appliances & Electronics	193	2.2%	-1.6%	5.2%
 Health Goods & Services	203	0.3%	2.8%	5.5%
 Home & Building Supplies	222	15.5%	5.4%	6.0%
 Books & Stationery Stores	40	0.1%	-4.3%	1.1%
 Liquor Stores	92	2.9%	3.0%	2.5%
 Recreation & Entertainment	148	-5.0%	-7.2%	4.0%
 Supermarkets & Food Retailers	1,234	1.2%	-1.3%	33.1%
 Travel & Accommodation	283	5.8%	8.4%	7.6%
 TOTAL RETAIL SPEND	3,724	2.7%	1.4%	100%

Monthly retail spend by category (\$M)



Change vs last year



Quarterly summary

September 2018

The total quarterly retail spend for the 91 days ending 28 September 2018 was \$11.9 billion. This was a decrease of 1.7% when compared to the previous quarter and an increase of 1.4% when compared to the same period last year.

Five of the twelve categories experienced increases in spend when compared to the previous quarter. The largest increases and decreases were similar to last month, with the Recreation & Entertainment category experiencing the greatest rise in spending (+4.0%) and the largest decrease was seen once again in the Clothing & Footwear category (-15.5%).

Compared to the same quarter of the previous year, spending increased in seven of the twelve categories. The Fuel & Service Station category continues to increase, up 12.0%, while Books & Stationery Stores experienced the greatest decline, down 5.4%.

Quarterly summary

September 2018

Retailer Category	Quarter Total \$M	% Change vs Prior Quarter	% Change vs Last Year	% Share
 Cafés, Restaurants & Bars	1,838	-1.2%	1.5%	15.4%
 Clothing & Footwear	536	-15.5%	-4.7%	4.5%
 Department Stores	564	-11.8%	-4.5%	4.7%
 Fuel & Service Stations	1,275	1.2%	12.0%	10.7%
 Furniture, Appliances & Electronics	629	-5.0%	-1.8%	5.3%
 Health Goods & Services	657	1.0%	2.2%	5.5%
 Home & Building Supplies	657	0.8%	2.7%	5.5%
 Books & Stationery Stores	133	-0.7%	-5.4%	1.1%
 Liquor Stores	294	-2.0%	3.3%	2.5%
 Recreation & Entertainment	512	4.0%	3.6%	4.3%
 Supermarkets & Food Retailers	3,962	-0.8%	-1.1%	33.2%
 Travel & Accommodation	886	2.4%	6.7%	7.4%
\$ TOTAL RETAIL SPEND	11,945	-1.7%	1.4%	100%

Quarterly spend by category (\$M)



Change vs last year



Selected regions of interest

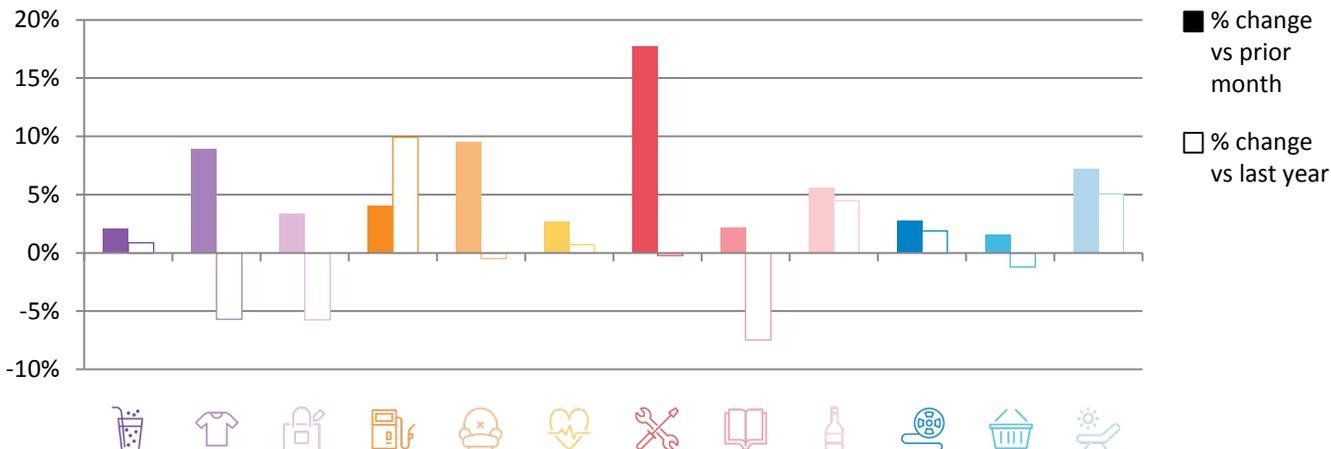
September 2018

Monthly trends for Canterbury

Retail spend in the Canterbury region for the 28 days ending 28/09/2018 was \$468.2 million. This represents a decrease in spend of 4.1% from the previous month and an increase of 0.6% year-on-year.

Retail spending in the Canterbury region was up in six categories compared to September last year. The greatest increase in year-on-year spend was seen in the Fuel & Service Stations category, up 9.9%, while the Books & Stationery Stores category had the largest decline, down 7.5%.

Compared to August, all twelve categories experienced an increase in spend. The Home & Building Supplies category increased by 17.7%, while the Furniture, Appliances & Electronics and the Clothing & Footwear categories followed behind, increasing by 9.5% and 8.9% respectively.



Monthly trends Southland

Retail spend in the Nelson region for the 28 days ending 28/09/2018 was \$70.9 million. This represents an increase of 4.0% against the previous month and an increase of 1.3% year-on-year.

Compared to September 2017, spending was up in eight of the twelve categories, with an 11.7% increase in the Fuel & Service Stations category. The Recreation & Entertainment category had the greatest decrease in spend when compared to last year, dropping 10.3%.

Month-on-month spend was also up in all but one of the twelve categories. The Home & Building Supplies category took the lead, increasing by 12.8%, with the Department Stores category not far behind, up 12.2%. The only drop in spending was in the Travel & Accommodation category, decreasing just 0.3%.

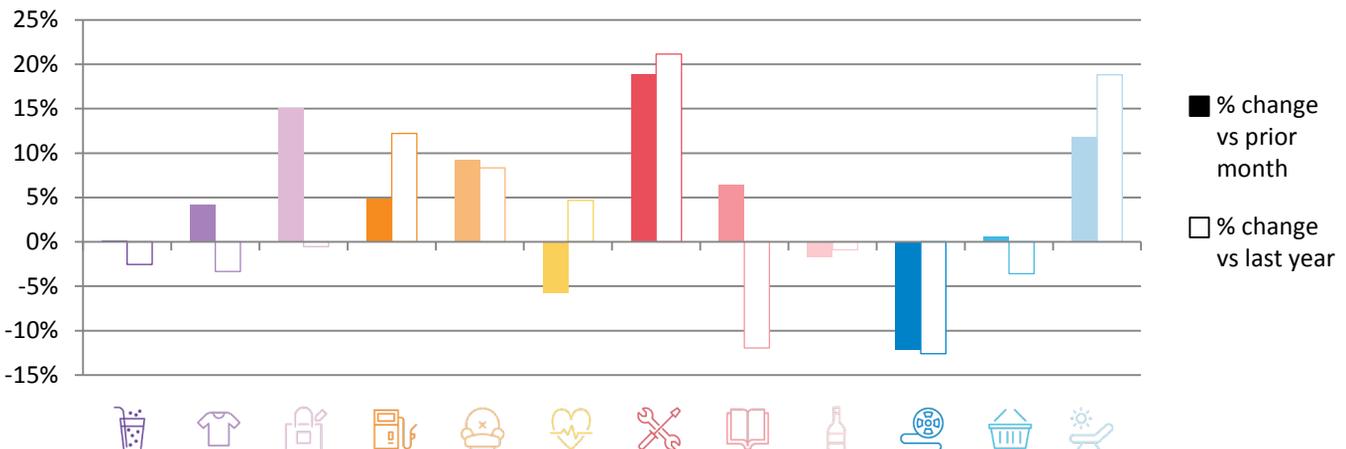


Monthly trends Taranaki

Retail spend in the Taranaki region for the 28 days ending 28/09/2018 was \$95.2 million. This represents an increase of 3.5% against the previous month and 2.1% year-on-year.

Retail spending in the Taranaki region increased in five of the twelve categories year-on-year. The Home & Building Supplies category saw the greatest increase in spend, going up 21.2%, followed by the Travel & Accommodation category, increasing by 18.8%. The decreases in spend when compared to September last year were largest in the Recreation & Entertainment and Books & Stationery Stores categories, down 12.6% and 11.9% respectively.

Compared to August, nine categories experienced increases in spend. The Home & Building supplies category increased the most at 18.9% while the Recreation & Entertainment category had the greatest decrease, down 12.2%.



Going up this month

The greatest increase in spending this month was seen in the Home & Building Supplies category, up 15.5%.

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

11

Categories up

16

Regions up

Going down this month

The only decrease in spending this month was seen in the Recreation & Entertainment category, down 5.0%.

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

1

Categories down

0

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 28/09/2018

Total online retail spend in New Zealand for the 28 days ending 28 September 2018 was \$501 million. This represents an increase of 5.0% year-on-year and a decrease of 1.9% from the previous month.

Online spending was up in nine of the ten categories year-on-year. Home & Building Supplies retailers saw the greatest increase in spending for the fourth month in a row, up 65.4%. Supermarkets & Food Retailers and Department Stores also continue to increase, both up 23.1% and 17.0% respectively.

Month-on-month, five of the ten categories experienced increases in spend. The largest increase in spend was exhibited in the Clothing & Footwear category, up 3.6%, while the largest drop in month-on-month spend was in the Recreation & Entertainment category, down 5.9%.

Online Retailer Category	Month Total \$M	% Change vs Prior Month	% Change vs Last Year	% Share
 Clothing & Footwear	33.6	3.6%	6.1%	6.7%
 Department Stores	14.0	2.2%	17.0%	2.8%
 Furniture, Appliances & Electronics	37.8	-4.6%	8.3%	7.5%
 Health Goods & Services	11.4	0.9%	7.5%	2.3%
 Home & Building Supplies	7.7	3.5%	65.4%	1.5%
 Books & Stationery Stores	8.4	-3.3%	3.0%	1.7%
 Liquor Stores	3.1	-3.1%	9.2%	0.6%
 Recreation & Entertainment	98.8	-5.9%	-5.7%	19.7%
 Supermarkets & Food Retailers	48.7	2.0%	23.1%	9.7%
 Travel & Accommodation	237.5	-1.7%	4.1%	47.4%
 Total Online Retail Spend	501.0	-1.9%	5.0%	100%

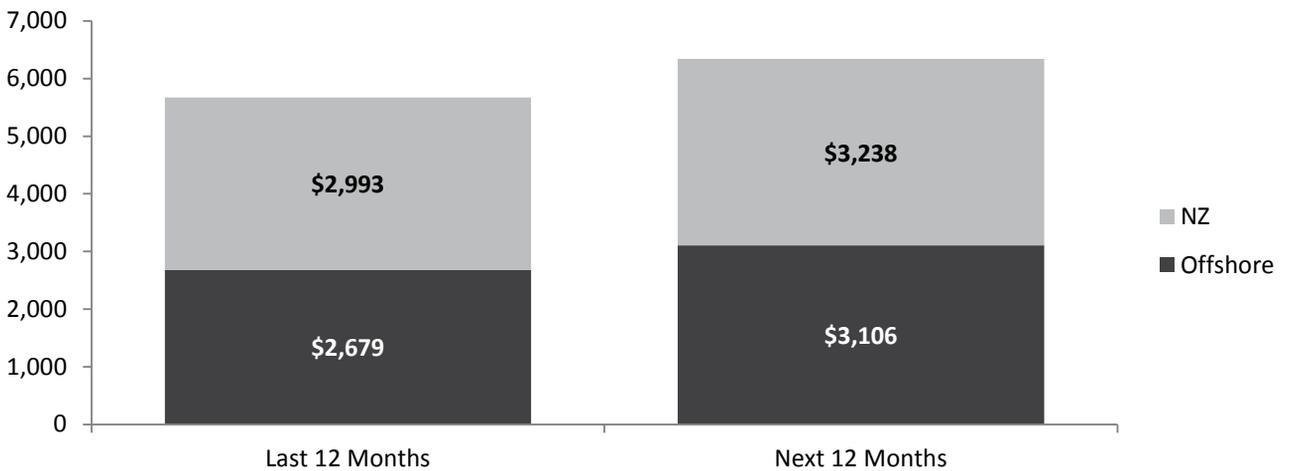
Online: New Zealand vs Offshore

New Zealand merchants accounted for 55.3% of online spend for the month of September. This was an increase of 2.7% compared to the previous month and 10.2% compared to the previous year.

For New Zealand merchants, eight of the ten categories saw increases in spend compared to August, with the Health Goods & Services category experiencing the greatest increase in spend, going up 11.4%. The Books & Stationery Stores category saw the biggest decrease in online spend, dropping 9.3%. New Zealand merchants saw increases in seven categories when compared to September 2017.

Spend at offshore retail merchants decreased by 7.1% when compared to the previous month and 0.9% when compared to the same period last year. Offshore merchants saw increases in spend in six categories year-on-year, the largest seen once again in Department Stores, up 82.3%, while the greatest decrease was seen in the Supermarkets & Food Retailers category, down 22.3%.

Projected total online spend (\$M)



% share of category spend

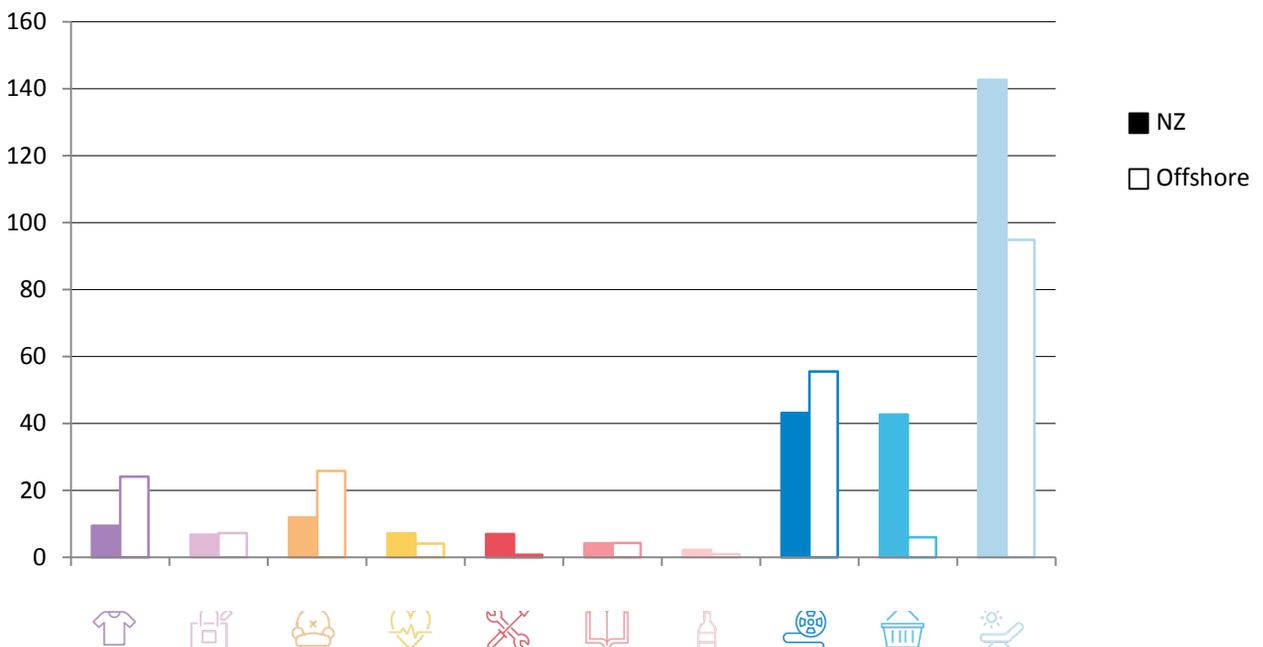


Online retail market summary New Zealand vs Offshore merchants

September 2018

Retailer Category	Month Total \$M		% Change vs Prior Month		% Change vs Last Year	
	NZ	Offshore	NZ	Offshore	NZ	Offshore
 Clothing & Footwear	9.5	24.1	7.0%	2.3%	9.1%	5.0%
 Department Stores	6.8	7.3	8.2%	-2.9%	-15.5%	82.3%
 Furniture, Appliances & Electronics	12.0	25.8	2.8%	-7.7%	17.6%	4.4%
 Health Goods & Services	7.2	4.2	11.4%	-13.2%	22.0%	-10.8%
 Home & Building Supplies	6.9	0.8	5.5%	-11.3%	79.6%	-2.3%
 Books & Stationery Stores	4.2	4.3	-9.3%	3.4%	-5.1%	12.4%
 Liquor Stores	2.2	0.9	3.5%	-15.5%	6.2%	17.2%
 Recreation & Entertainment	43.2	55.6	-7.3%	-4.9%	-20.7%	10.7%
 Supermarkets & Food Retailers	42.7	6.0	3.6%	-8.5%	34.1%	-22.3%
 Travel & Accommodation	142.7	94.8	5.1%	-10.5%	16.7%	-10.5%
 Total Retail Spend	277.3	223.7	2.7%	-7.1%	10.2%	-0.9%

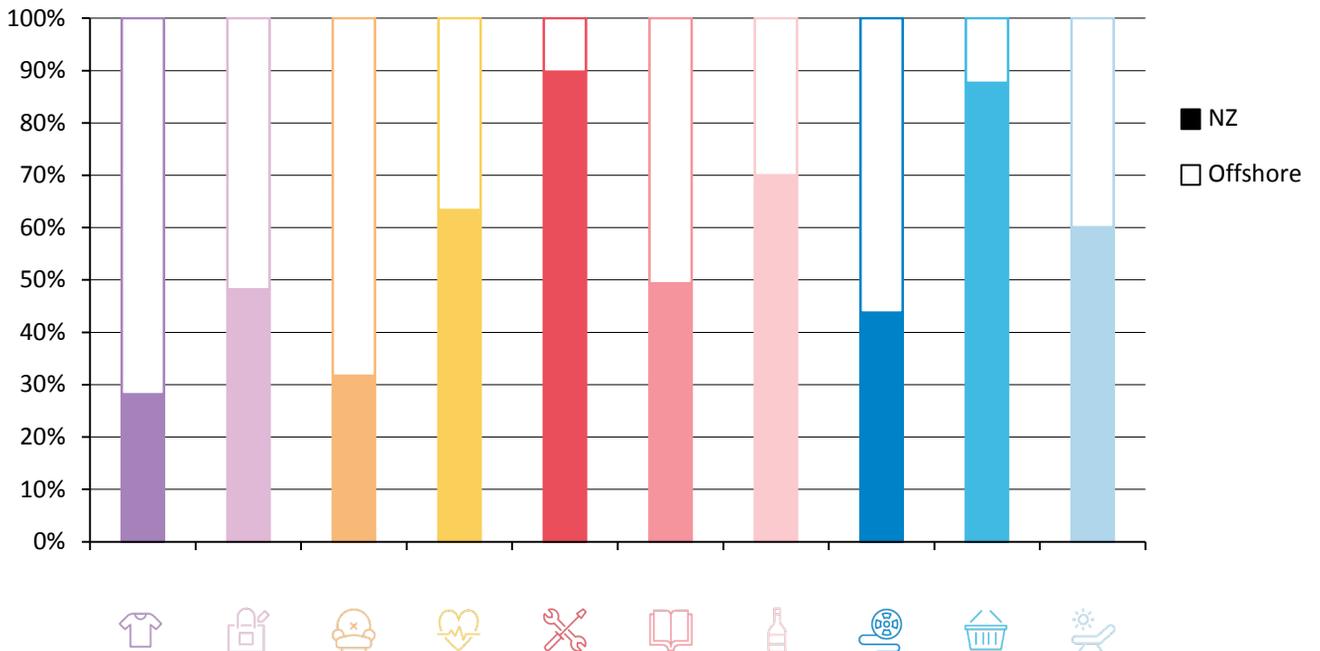
Online retailer total revenue by category (\$M)



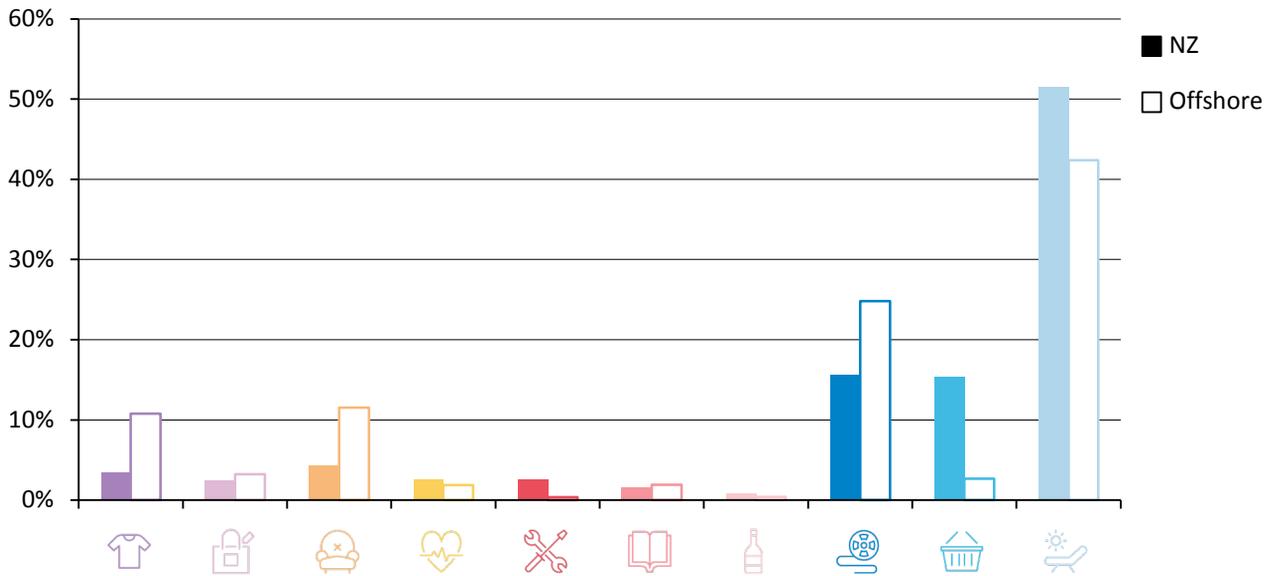
Monthly online revenue change year-on-year



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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