



Retailwatch














Value of electronic card transactions within retail categories

Period ending 28/12/2017

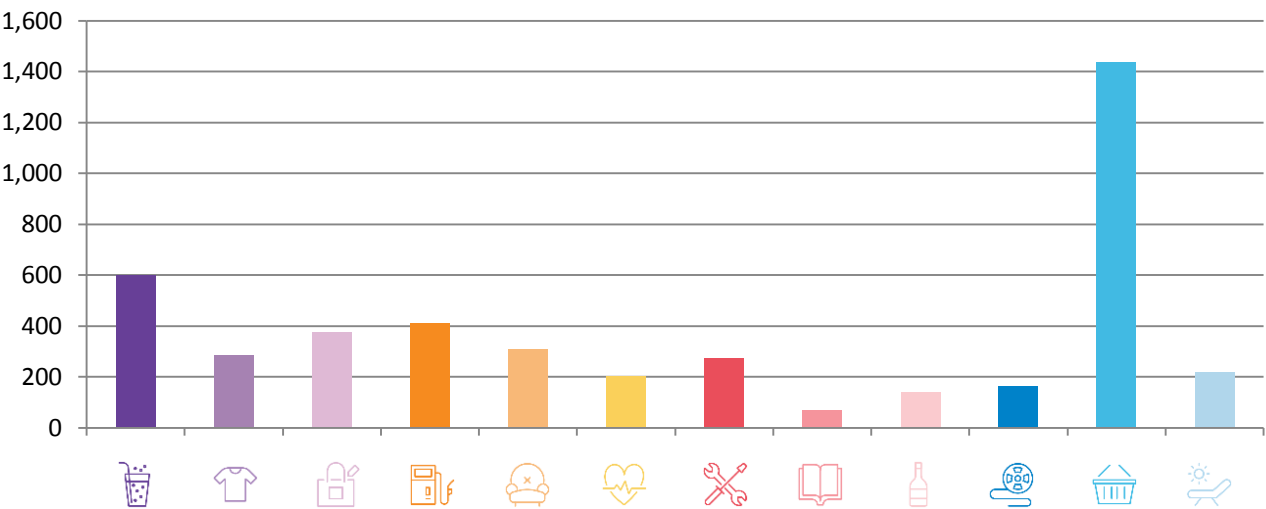
Total retail spend in New Zealand for the 28 days ending 28 December 2017 was \$4.49 billion. This was an increase of 16.6% compared to November and an increase of 1.3% when compared to the same period last year.

Spending was up in eight categories year-on-year, with Fuel & Service Stations (+6.4%) showing the greatest increase followed by Liquor Stores (+5.2%). The Books & Stationery Stores category exhibited the greatest decrease year-on-year, declining 7.2%. This was followed by the Department Stores category, down 4.4%.

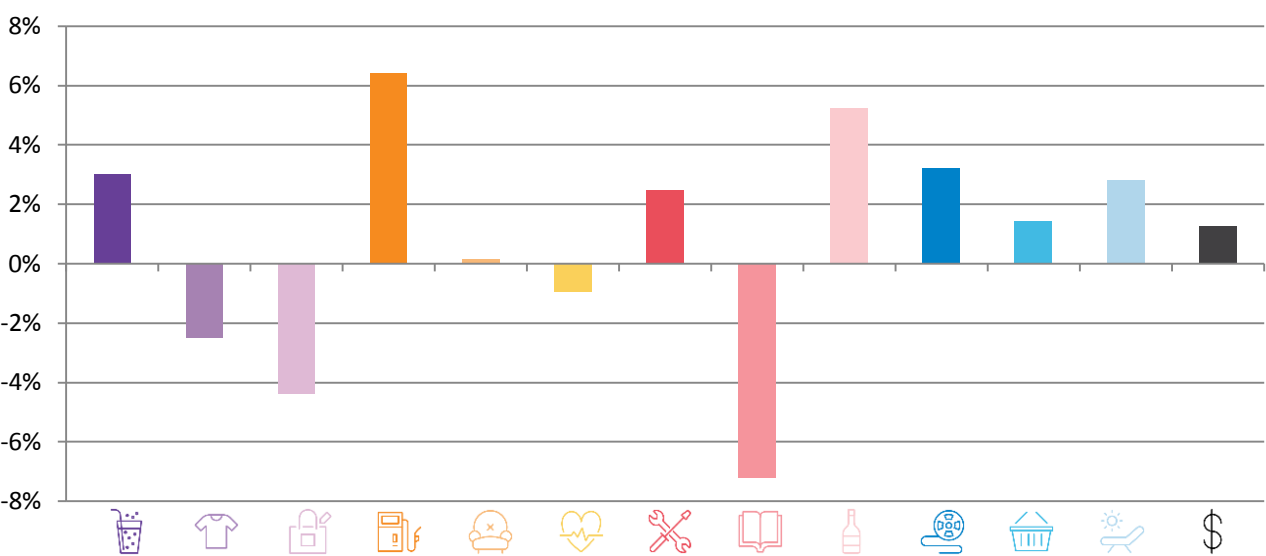
Month-on-month, ten of the twelve categories experienced increases in spend. The largest increases were seen in the Department Stores and Books & Stationery Stores categories, increasing 67.5% and 49.8% respectively. The greatest month-on-month decrease was seen in the Travel & Accommodation category, down 10.4%.

Retailer Category	Month Total \$M	% Change vs Prior Month	% Change vs Last Year	% Share
 Cafés, Restaurants & Bars	599	8.7%	3.0%	13.3%
 Clothing & Footwear	285	44.1%	-2.5%	6.4%
 Department Stores	378	67.5%	-4.4%	8.4%
 Fuel & Service Stations	414	9.7%	6.4%	9.2%
 Furniture, Appliances & Electronics	309	35.0%	0.1%	6.9%
 Health Goods & Services	202	-0.4%	-1.0%	4.5%
 Home & Building Supplies	273	12.0%	2.5%	6.1%
 Books & Stationery Stores	72	49.8%	-7.2%	1.6%
 Liquor Stores	140	40.9%	5.2%	3.1%
 Recreation & Entertainment	164	8.5%	3.2%	3.6%
 Supermarkets & Food Retailers	1,436	12.0%	1.4%	32.0%
 Travel & Accommodation	218	-10.4%	2.8%	4.8%
 TOTAL RETAIL SPEND	4,491	16.6%	1.3%	100%

Monthly retail spend by category (\$M)



Change vs last year



Quarterly summary

December 2017














The total quarterly retail spend for the 91 days ending 28 December 2017 was \$13 billion. This was an increase of 13.7% when compared to the previous quarter and an increase of 0.9% when compared to the same period last year.

Eleven of the twelve categories experienced an increase in spend when compared to the previous quarter. The largest increase in spending was in the Department Stores category (+49.7%), followed by Home & Building Supplies (+31.2%) and Clothing & Footwear (+29.9%). The only decrease in spend was seen in Travel & Accommodation (-3.0%).

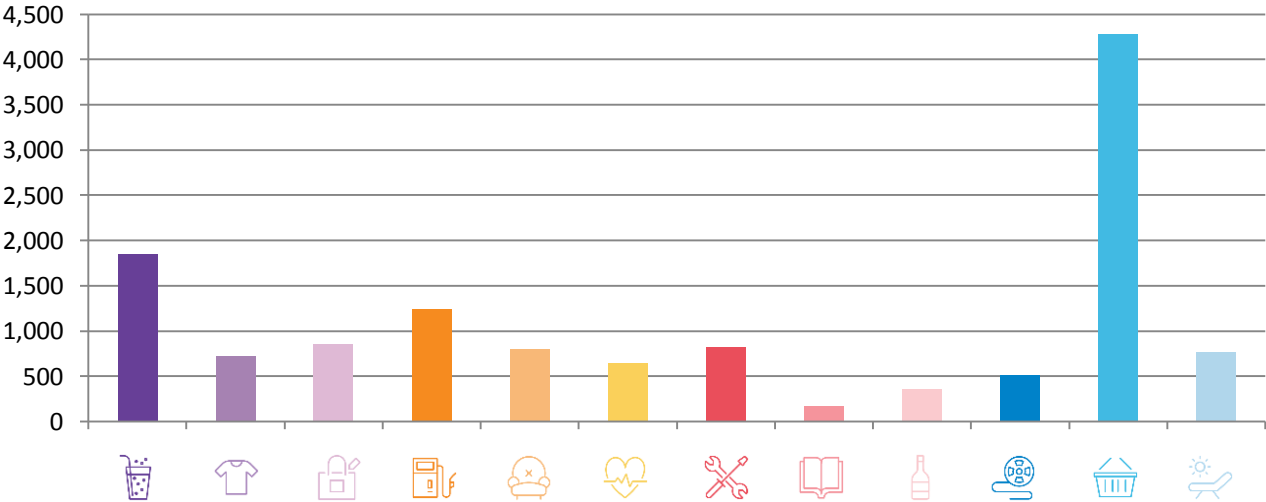
Compared to the same quarter of the previous year, spending increased in six of the twelve categories, with Liquor Stores again showing the greatest increase, up 5.1%. Similarly, Books & Stationery Stores (-7.2%) again showed the greatest decrease year-on-year, followed by Clothing & Footwear (-3.2%).

Quarterly summary

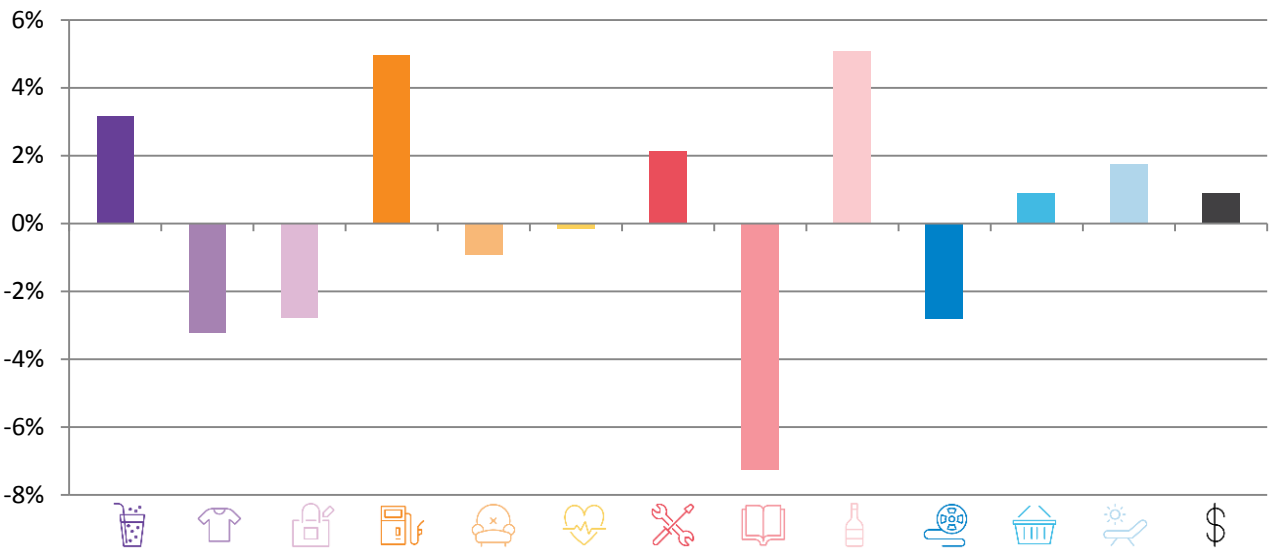
December 2017

Retailer Category	Quarter Total \$M	% Change vs Prior Quarter	% Change vs Last Year	% Share
 Cafés, Restaurants & Bars	1,843	5.7%	3.1%	14.2%
 Clothing & Footwear	716	29.9%	-3.2%	5.5%
 Department Stores	849	49.7%	-2.8%	6.5%
 Fuel & Service Stations	1,240	13.2%	5.0%	9.5%
 Furniture, Appliances & Electronics	796	27.0%	-0.9%	6.1%
 Health Goods & Services	641	1.1%	-0.1%	4.9%
 Home & Building Supplies	827	31.2%	2.1%	6.4%
 Books & Stationery Stores	172	26.6%	-7.2%	1.3%
 Liquor Stores	359	29.5%	5.1%	2.8%
 Recreation & Entertainment	513	10.7%	-2.8%	3.9%
 Supermarkets & Food Retailers	4,279	9.2%	0.9%	32.9%
 Travel & Accommodation	763	-3.0%	1.7%	5.9%
 TOTAL RETAIL SPEND	12,998	13.7%	0.9%	100%

Quarterly spend by category (\$M)



Change vs last year



Selected regions of interest

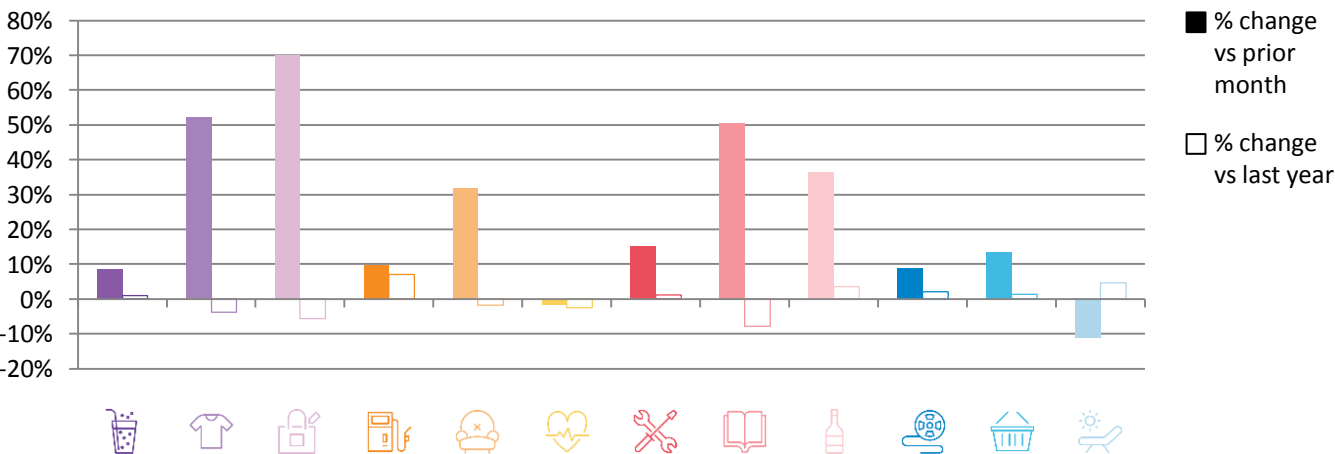
December 2017

Monthly trends Auckland

Retail spend in the Auckland region for the 28 days ending 28/12/2017 was \$1.65 billion. This represents an increase of 16.7% from the previous month and an increase of 0.5% year-on-year.

Retail spending in the Auckland region increased in seven of the twelve categories compared to December last year. The greatest increase in year-on-year spend was seen in the Fuel & Service Stations category (+7.0%), followed by Travel & Accommodation (+4.6%). The greatest reduction in year-on-year spend was seen in the Books & Stationery Stores category (-7.8%).

Compared to November, ten categories experienced an increase in spend. The greatest of these increases were exhibited in the Department Stores category (+69.9%), followed closely by Clothing & Footwear (+52.1%). Travel & Accommodation (-11.1%) and Health Goods & Services (-1.5%) were the only categories to experience a month-on-month decrease in spend.

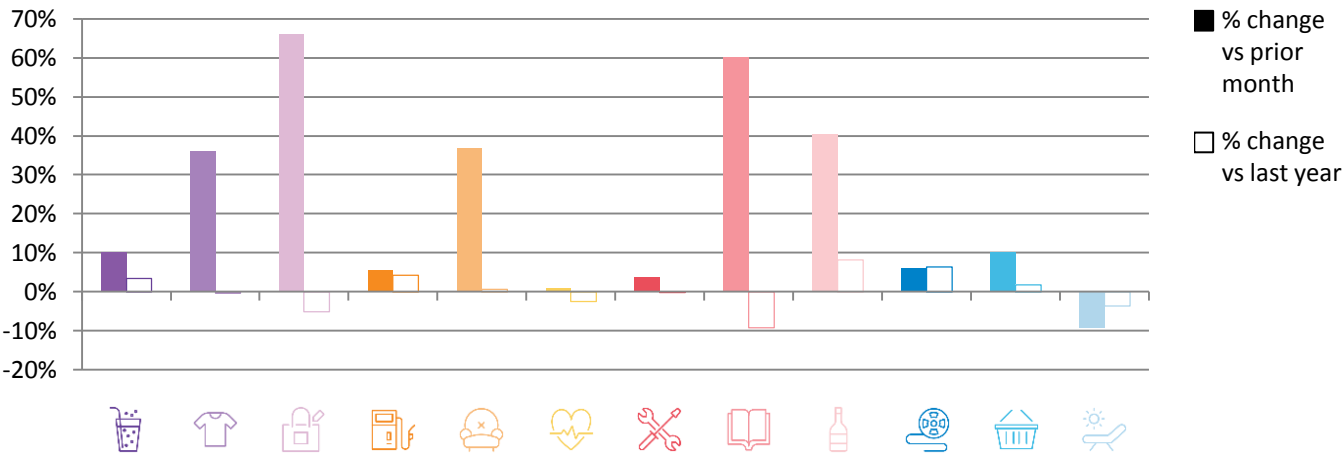


Monthly trends Canterbury

Retail spend in the Canterbury region for the 28 days ending 28/12/2017 was \$563.6 million. This represents an increase of 15.2% against the previous month and an increase of 0.8% year-on-year.

Compared to December 2016, spending was up in six categories, with Liquor Stores (+8.2%) experiencing the largest increase in spend. Books & Stationery Stores (-9.3%) and Department Stores (-5.1%) experienced the greatest decreases in year-on-year spend.

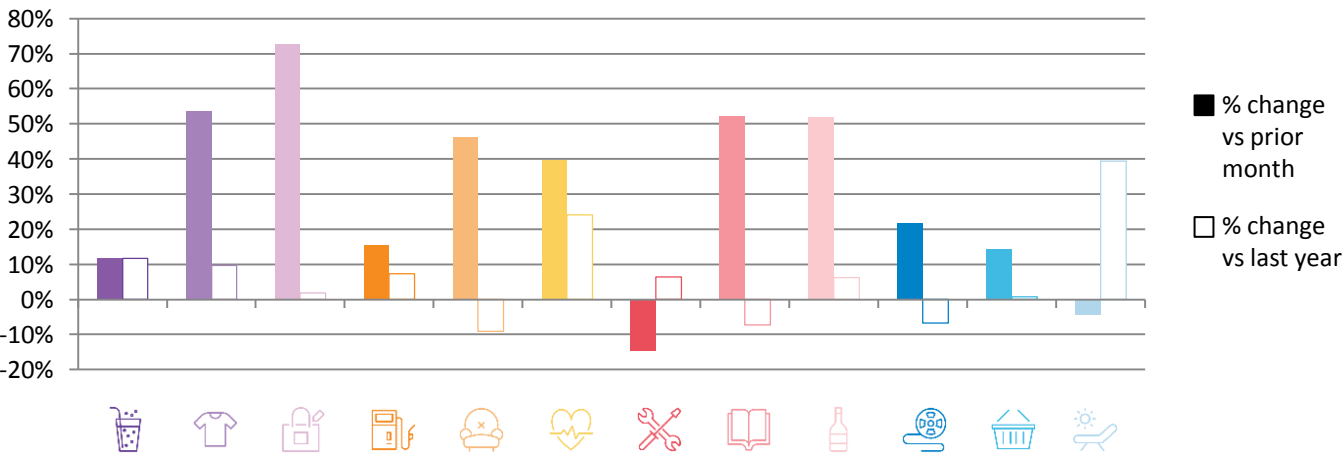
Month-on-month spend was up in eleven categories with Department Stores (+66.1%) experiencing the largest increase in spend, followed by Books & Stationery Stores (+60.1%) and Liquor Stores (40.3%). The Travel & Accommodation category experienced the only decrease in month-on-month spend, down 9.1%.



Monthly trends Gisborne

Retail spend in the Gisborne region for the 28 days ending 28/12/2017 was \$39.8million. This represents an increase of 21.2% against the previous month and an increase of 4.6% year-on-year.

Retail spending in the Gisborne region increased in nine of the twelve categories year-on-year. Travel & Accommodation (39.3%) experienced the greatest increase in spend, followed by Health Goods & Services (+24.1%). The greatest decrease in spend was witnessed in the Furniture, Appliances & Electronics category, declining 9.1%. Compared to November, ten categories experienced increases in spend. The Department Stores category led the way with a 72.5% increase, followed by Clothing & Footwear (+53.6%) and Books & Stationery Stores (+52.2%). The greatest decrease was seen again in the Home & Building Supplies category (-14.8%).



Going up this month

The greatest increase in spending this month was seen in the Department Stores category, up 67.5%.

The Gisborne region experienced the greatest increase in spend this month, up 21.2% when compared to November 2017.

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 10.4%.

No regions experienced month-on-month decreases in December.

2

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 28/12/2017

Total online retail spend in New Zealand for the 28 days ending 28 December 2017 was \$351 million. This represents an increase of 10.4% year-on-year and a decrease of 12.5% against the previous month.

Online spending was up in nine of the ten categories year-on-year. Supermarkets /Food Retailers (+27.9%) saw the greatest increase in spending, followed by Clothing & Footwear (+12.7%). The Home & Building Supplies category (-10.5%) exhibited the only decrease in spend.

Month-on-month, seven of the ten categories experienced decreases in spend. The only increases in spend were exhibited by Department Stores (+10.2%), Liquor Stores (+6.6%) and Books & Stationery Stores (+1.9%). Home & Building Supplies (-21.7%) and Travel & Accommodation (-21.4%) saw the greatest decreases in spend month-on-month.

Online Retailer Category		Month Total \$M	% Change vs Prior Month	% Change vs Last Year	% Share
	Clothing & Footwear	30.8	-14.1%	12.7%	8.8%
	Department Stores	15.8	10.2%	6.5%	4.5%
	Furniture, Appliances & Electronics	30.6	-1.0%	10.7%	8.7%
	Health Goods & Services	8.3	-1.8%	9.9%	2.4%
	Home & Building Supplies	3.8	-21.7%	-10.5%	1.1%
	Books & Stationery Stores	10.4	1.9%	10.1%	3.0%
	Liquor Stores	3.5	6.6%	3.9%	1.0%
	Recreation & Entertainment	75.9	-7.8%	12.4%	21.6%
	Supermarkets & Food Retailers	33.5	-4.3%	27.9%	9.5%
	Travel & Accommodation	138.5	-21.4%	6.6%	39.4%
	Total Online Retail Spend	351.0	-12.5%	10.4%	100%

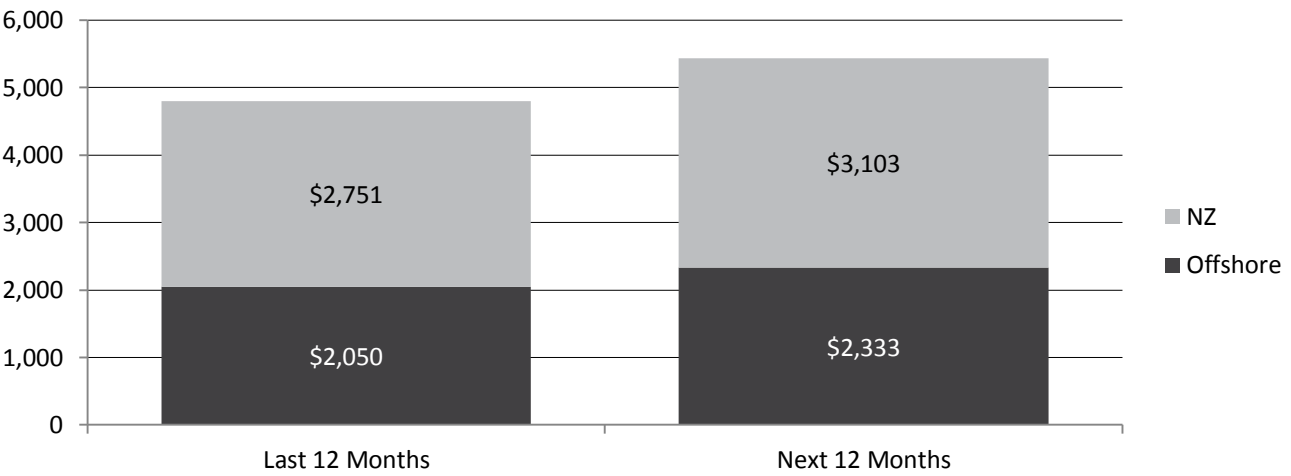
Online: New Zealand vs Offshore

New Zealand merchants accounted for 56.3% of online spend for the month of December. This was a decrease of 14.5% compared to the previous month and an increase of 8.2% compared to the previous year.

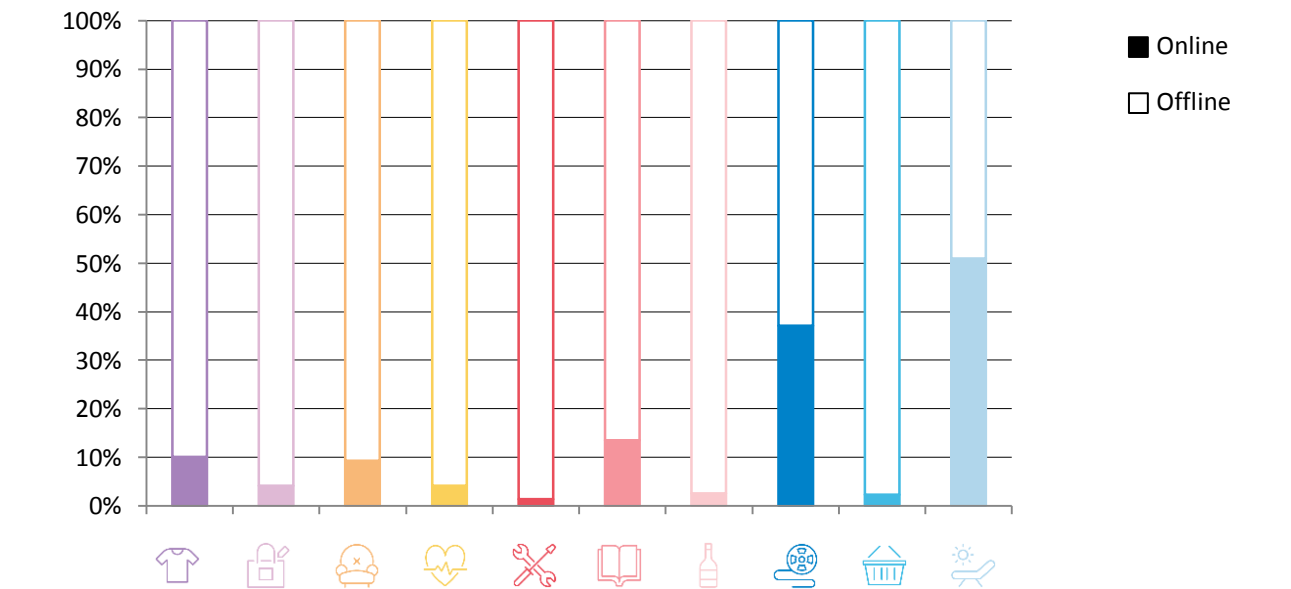
For New Zealand merchants, only three of the ten categories saw increases in spend compared to November, with Travel & Accommodation (-22.7%) and Home & Building Supplies(-19.5%) experiencing the greatest decreases in spend. Department Stores saw the greatest increase compared to November, going up 12.7%.

Spend at offshore retail decreased by 9.9% when compared to the previous month but increased by 13.3% when compared to the same period last year. Offshore merchants saw increases in spend in eight categories year-on-year, the largest in Books & Stationery Stores (+31.5%). When compared to the previous month, only three categories experienced increases in spend. These included Liquor Stores (+16.1%), Books & Stationery Stores (+6.1%), and Recreation & Entertainment (+3.4%).

Projected total online spend (\$M)














% share of category spend

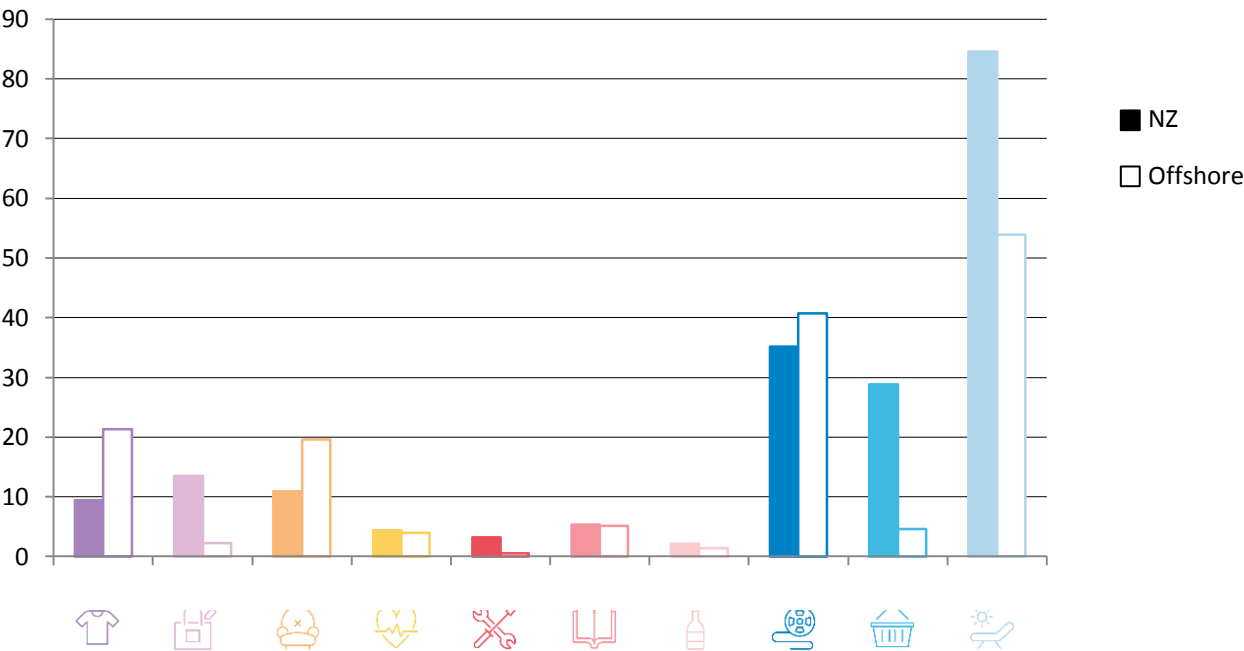


Online retail market summary New Zealand vs Offshore merchants

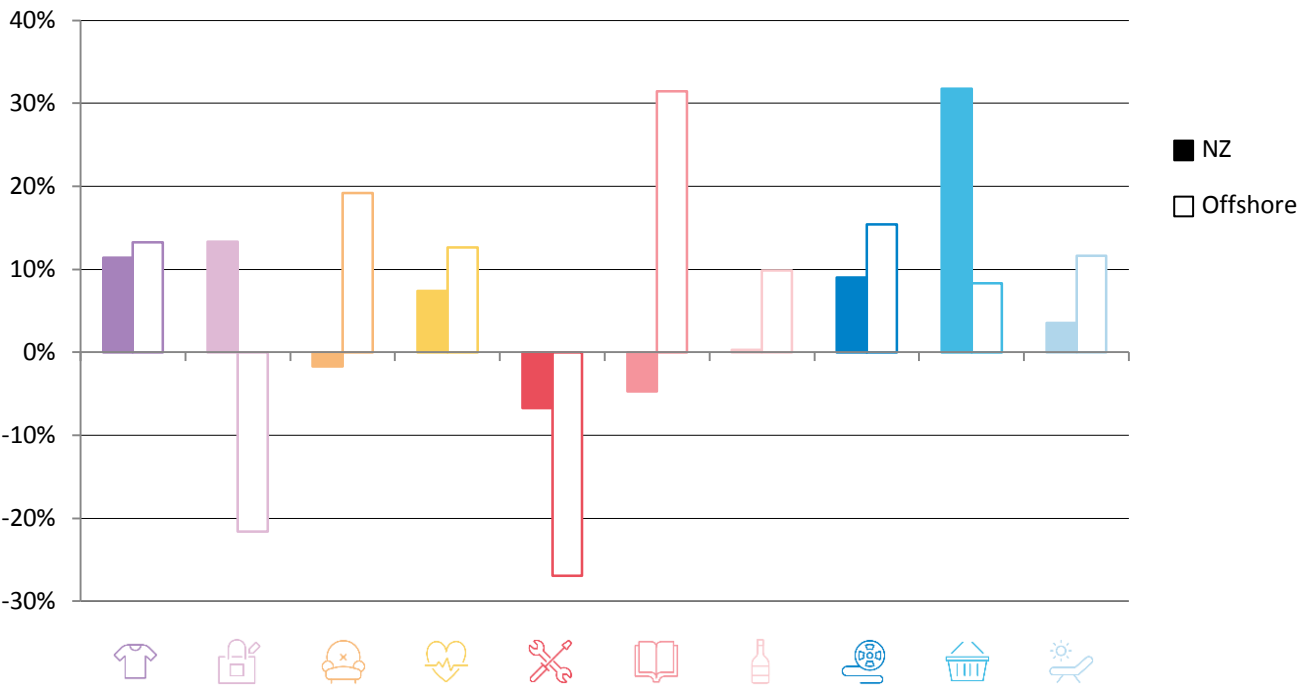
December 2017

Retailer Category	Month Total \$M		% Change vs Prior Month		% Change vs Last Year	
	NZ	Offshore	NZ	Offshore	NZ	Offshore
 Clothing & Footwear	9.5	21.3	-8.3%	-16.5%	11.4%	13.3%
 Department Stores	13.5	2.3	12.7%	-3.0%	13.3%	-21.6%
 Furniture, Appliances & Electronics	11.0	19.6	3.2%	-3.2%	-1.7%	19.2%
 Health Goods & Services	4.3	4.0	-3.0%	-0.4%	7.4%	12.7%
 Home & Building Supplies	3.2	0.6	-19.5%	-32.1%	-6.7%	-26.9%
 Books & Stationery Stores	5.3	5.1	-1.9%	6.1%	-4.7%	31.5%
 Liquor Stores	2.1	1.4	1.1%	16.1%	0.3%	9.9%
 Recreation & Entertainment	35.2	40.7	-18.0%	3.4%	9.0%	15.4%
 Supermarkets & Food Retailers	28.8	4.7	-3.5%	-8.8%	31.8%	8.3%
 Travel & Accommodation	84.5	53.9	-22.7%	-19.4%	3.6%	11.7%
 Total Retail Spend	197.5	153.5	-14.5%	-9.9%	8.2%	13.3%

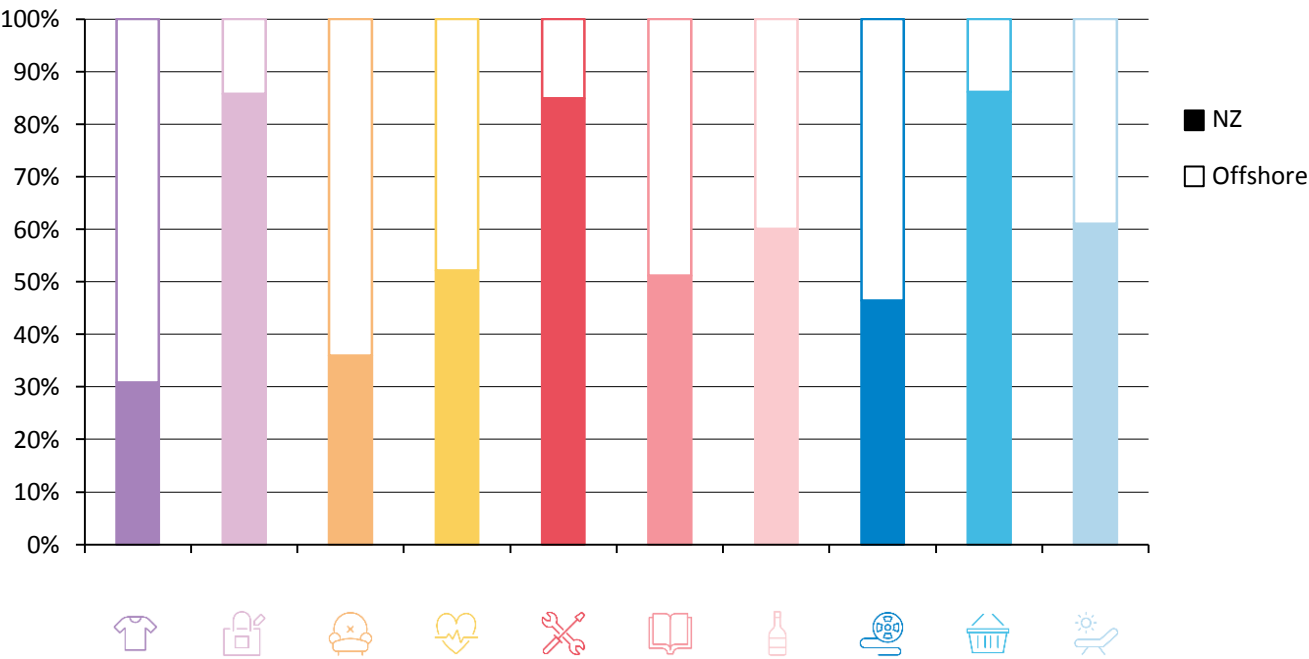
Online retailer total revenue by category (\$M)



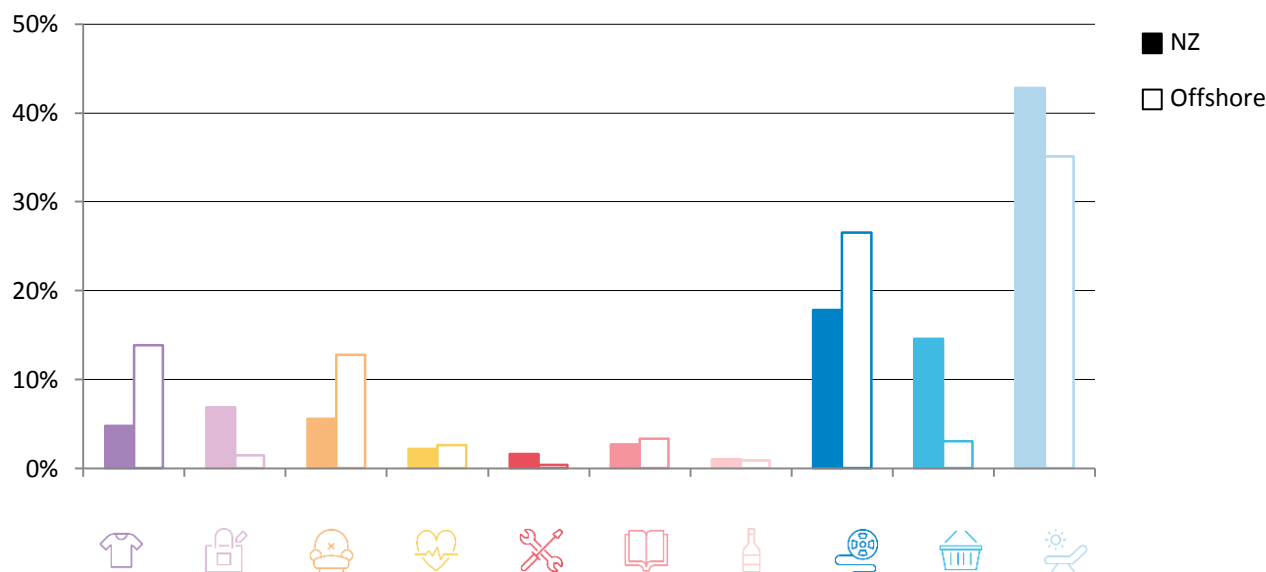
Monthly online revenue change year-on-year



Share of spend by category



% share of category spend



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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