



Value of electronic card transactions within retail categories

Period ending 28/01/2017

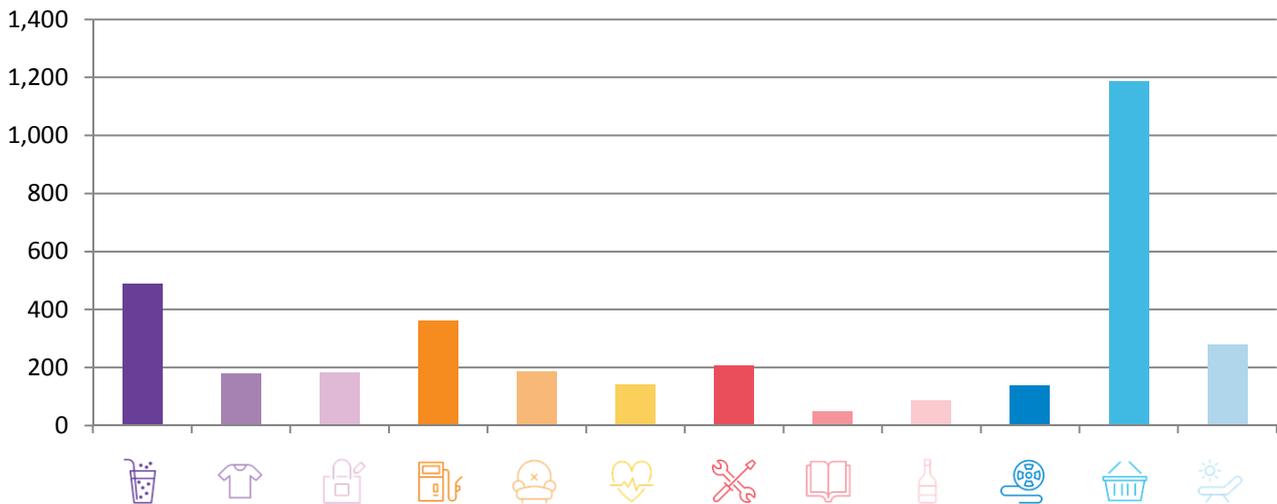
Total retail spend in New Zealand for the 28 days ending 28 January 2017 was \$3.5 billion. As is expected coming down from Christmas spending, this is a large decrease (-19.6%) compared to the previous month however spending did increase by 4.2% compared to the same period last year.

Spending was up across all but two categories year on year. The categories showing the greatest increase in spending were Travel & Accommodation (+9.9%), Fuel & Service Stations (+9.4%) and Liquor Stores (+7.7%). Health Goods & Services (-0.6%) and Furniture, Appliance & Electronics (-0.2%) were the only two categories to show a year on year decrease in spend.

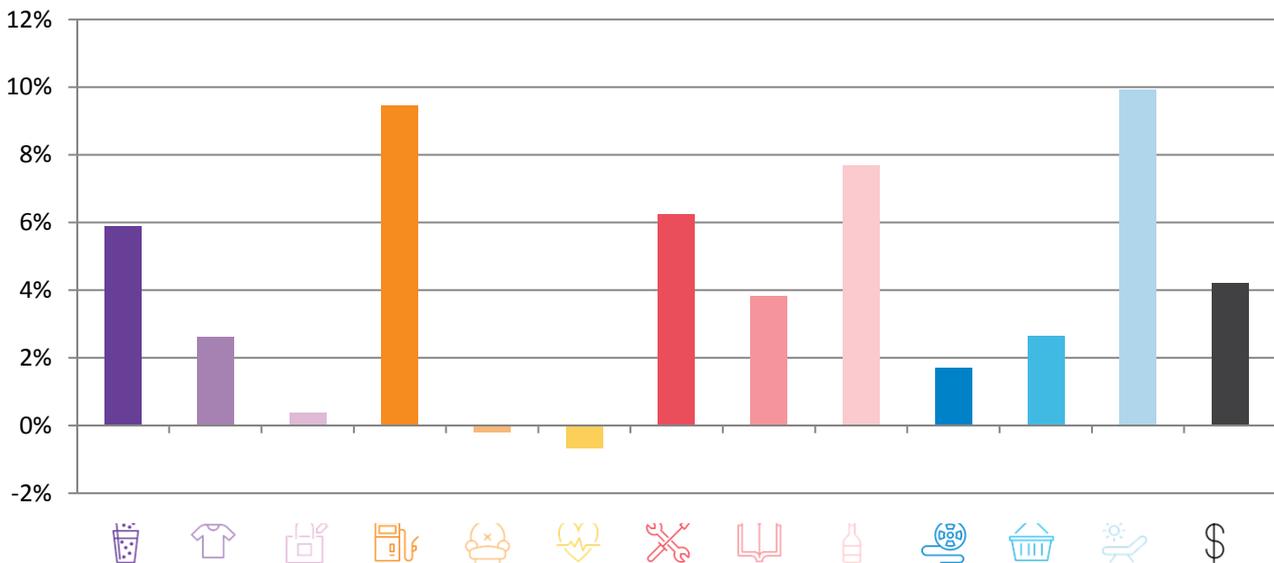
Travel & Accommodation was the only category to experience an increase in month on month spending, increasing by 39.8%. Categories with the greatest decreases in month on month spend were Department Stores (-54.0%) and Furniture, Appliances & Electronics (-40.0%).

Retailer Category	Month Total \$M	% Change vs Prior Month	% Change vs Last Year	% Share
 Cafés, Restaurants & Bars	487	-11.2%	5.9%	14.0%
 Clothing & Footwear	178	-39.2%	2.6%	5.1%
 Department Stores	182	-54.0%	0.4%	5.2%
 Fuel & Service Stations	361	-6.8%	9.4%	10.4%
 Furniture, Appliances & Electronics	186	-40.0%	-0.2%	5.3%
 Health Goods & Services	142	-24.9%	-0.6%	4.1%
 Home & Building Supplies	208	-22.1%	6.2%	6.0%
 Books & Stationery Stores	50	-32.0%	3.8%	1.4%
 Liquor Stores	85	-32.8%	7.7%	2.5%
 Recreation & Entertainment	138	-9.2%	1.7%	4.0%
 Supermarkets & Food Retailers	1,188	-14.7%	2.7%	34.1%
 Travel & Accommodation	278	39.8%	9.9%	8.0%
 TOTAL RETAIL SPEND	3,484	-19.6%	4.2%	100%

Monthly retail spend by category (\$M)



Change vs last year



Quarterly summary

January 2017

The total quarterly retail spend for the 91 days ending 28 January 2017 was \$12.5 billion. This is an increase of 11.2% when compared to the previous quarter and an increase of 3.2% when compared to the same period last year.

When compared to the previous quarter, spend again increased the most in the Department Stores (+46.2%) category this month, followed by Books & Stationery Stores (+32.4%). The only category where spend decreased when compared to the previous quarter was Health Goods & Services (-3.0%).

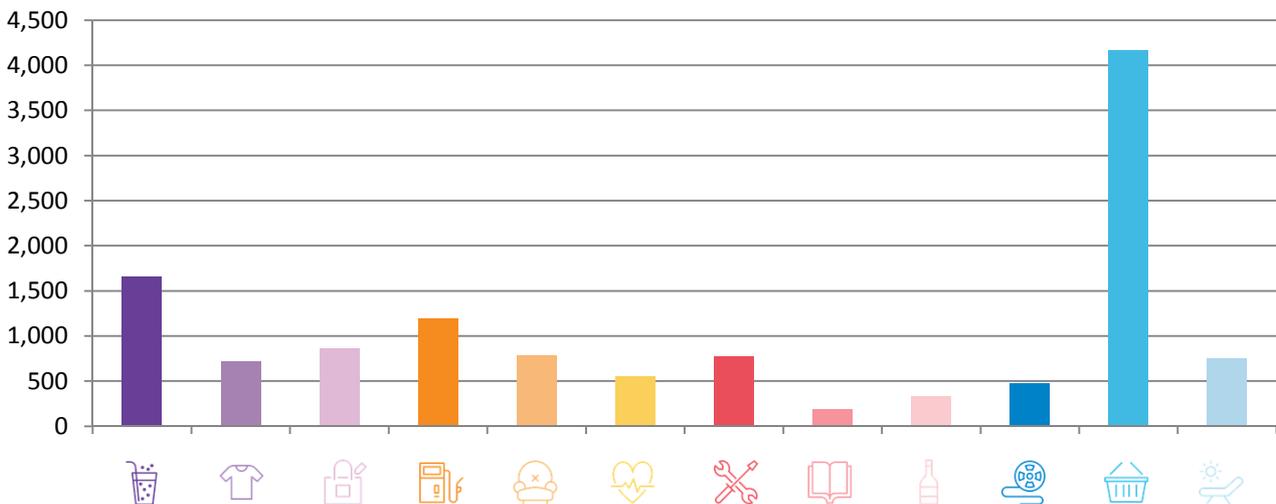
Compared to the same quarter of the previous year spending increased in all but one category, Department Stores (-1.1%). The greatest year on year increases came from Recreation and Entertainment (+7.7%), Travel & Accommodation (+5.6%), Cafes, Restaurants & Bars (+5.3%) and Home & Building Supplies (+5.1%)

Quarterly summary

January 2017

Retailer Category	Quarter Total \$M	% Change vs Prior Quarter	% Change vs Last Year	% Share
 Cafés, Restaurants & Bars	1,659	3.7%	5.3%	13.3%
 Clothing & Footwear	719	26.2%	2.2%	5.8%
 Department Stores	863	46.2%	-1.1%	6.9%
 Fuel & Service Stations	1,196	10.1%	3.6%	9.6%
 Furniture, Appliances & Electronics	782	19.7%	1.7%	6.3%
 Health Goods & Services	555	-3.0%	1.3%	4.5%
 Home & Building Supplies	778	13.5%	5.1%	6.2%
 Books & Stationery Stores	184	32.4%	3.4%	1.5%
 Liquor Stores	332	26.1%	4.2%	2.7%
 Recreation & Entertainment	480	5.7%	7.7%	3.9%
 Supermarkets & Food Retailers	4,164	8.2%	2.6%	33.4%
 Travel & Accommodation	752	1.3%	5.6%	6.0%
 TOTAL RETAIL SPEND	12,464	11.2%	3.2%	100%

Quarterly spend by category (\$M)



Change vs last year



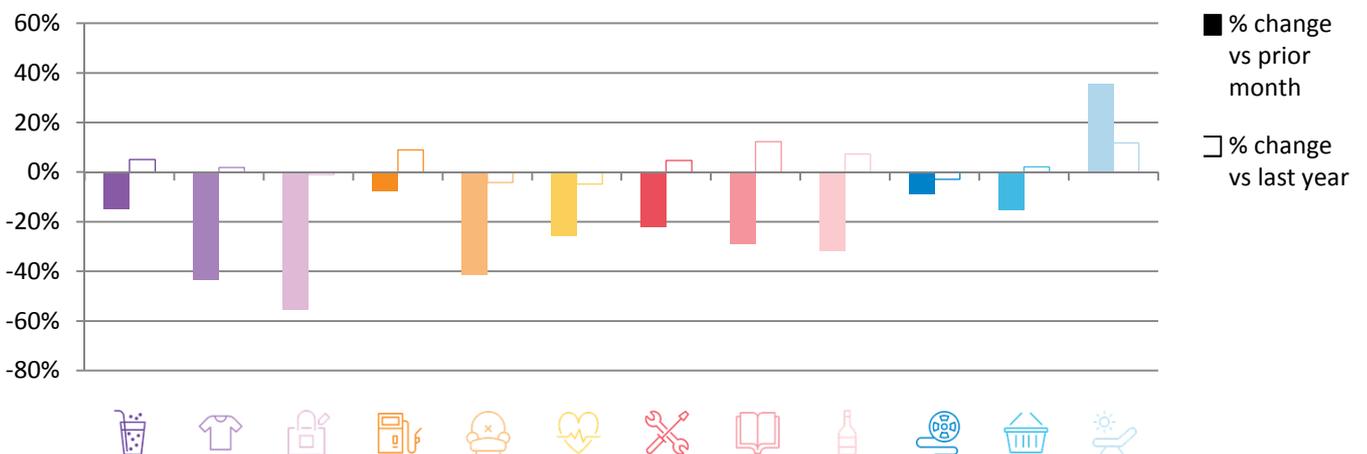
Selected regions of interest

January 2017

Monthly trends Auckland

Closely following national trends, Travel & Accommodation (+35.5%) was the only category to experience an increase in spending for January 2017 when compared to the previous month. Month on month, the greatest decreases in spending can be seen in the Department Stores (-55.5%), Clothing & Footwear (-43.5%) and Furniture, Appliances & Electronics (-41.6%) categories.

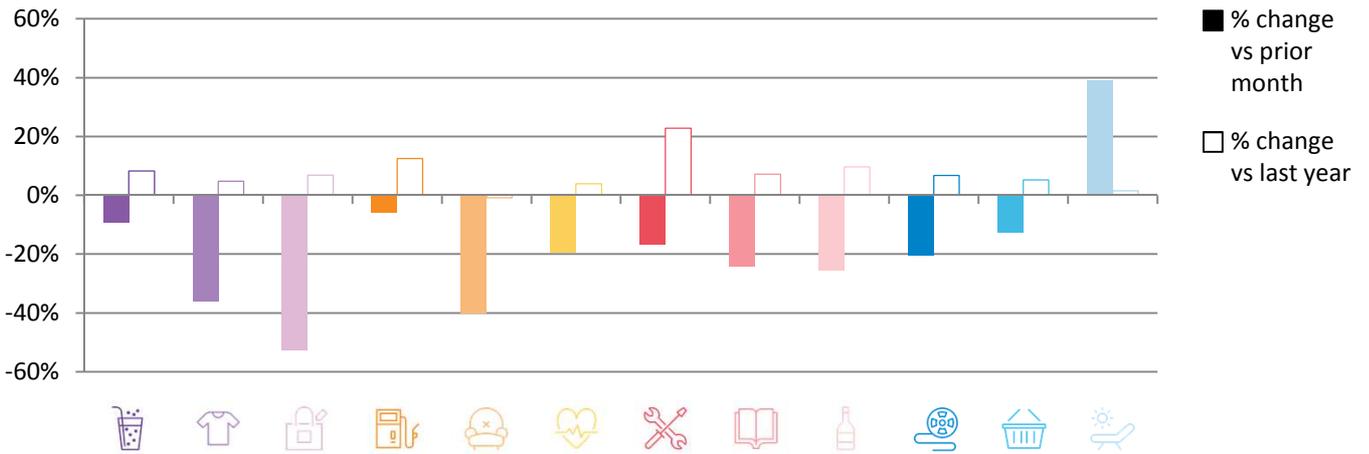
Eight of the twelve categories saw an increase in year on year spending in January. These increases in spend were led by Books & Stationery Stores (+12.3%) and Travel & Accommodation (+11.7%). Other categories saw moderate increases in spend. The greatest decreases in year on year spending were in Health Goods & Services and Furniture, Appliances & Electronics spend, down 4.8% and 4.2%, respectively.



Monthly trends Northland

Spending in Northland was up in all but one category year on year with only decrease in Furniture, Appliances & Electronics (-0.8%) spend. The greatest increases in spending when compared to January 2016 were seen in Home & Building Supplies (+22.8%) and Fuel & Service Stations (12.5%).

In contrast to Northlands year on year trends, compared to the December 2016 spending decreased in all categories with the exception of Travel & Accommodation (+39.1%). These month on month decreases were led by Department Stores (-52.9%) and Furniture, Appliances & Electronics (-40.2%).



Monthly trends Taranaki

Taranaki did not have a good month in January, it was the only region to experience a decrease in spending when compared to the previous month (-16.6%) and previous year (-0.5%).

The decrease in year on year spend was driven by a significant decrease in the Health Goods & Services category (-10.9%) and smaller decreases in Department Stores (-4.8%) and Furniture, Appliances & Homewares (-4.2%) spend. However, Recreation & Entertainment had a large increase in spend when compared to January 2016, up 29.1%.

The greatest increase in month on month spending in Taranaki was in Travel & Accommodation (+58.1%) while the largest decrease was seen in the Department Stores (-52.8%) category.



↑ Going up this month

The greatest increase in spending this month was seen in the Travel & Accommodation category, up 39.8%.

Coming down from the Christmas period, no regions experienced any increases in spending in the month of January.

1

Categories up

0

Regions up

↓ Going down this month

The two categories to have the greatest decreases in spend this month were Department Stores (-54.0%) and Furniture, Appliances & Electronics (-40.0%).

Regionally, Auckland showed the greatest decrease in spending this month, down 20.8%.

11

Categories down

16

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 28/01/2017

Total online retail spend in New Zealand for the 28 days ending 28 January 2017 was \$339 million. This represents an increase of 15.7% year on year and an increase of 7.3% against the previous month.

Online spending was up across every category year on year with the exception of Home & Building supplies (-33.9%). The categories showing the greatest increases were Books & Stationery Stores (+71.0%) and Department Stores (+44.4%).

The only category to experience an increase in month on month spend was Travel & Accommodation (+44.6%). Compared to the previous month, categories with the greatest decreases spending were Liquor Stores (-54.2%), Department Stores (-40.4%) and Home & Building Supplies (-39.5%).

Online Retailer Category	Month Total \$M	% Change vs Prior Month	% Change vs Last Year	% Share
 Clothing & Footwear	21.28	-19.1%	14.9%	6.3%
 Department Stores	10.41	-40.4%	44.4%	3.1%
 Furniture, Appliances & Electronics	21.56	-26.4%	28.3%	6.4%
 Health Goods & Services	6.40	-17.2%	3.4%	1.9%
 Home & Building Supplies	2.25	-39.5%	-33.9%	0.7%
 Books & Stationery Stores	7.50	-21.9%	71.0%	2.2%
 Liquor Stores	1.58	-54.2%	6.9%	0.5%
 Recreation & Entertainment	55.82	-8.0%	20.2%	16.4%
 Supermarkets & Food Retailers	25.00	-11.5%	22.7%	7.4%
 Travel & Accommodation	187.57	44.6%	11.4%	55.3%
 Total Online Retail Spend	339.35	7.3%	15.7%	100.0%

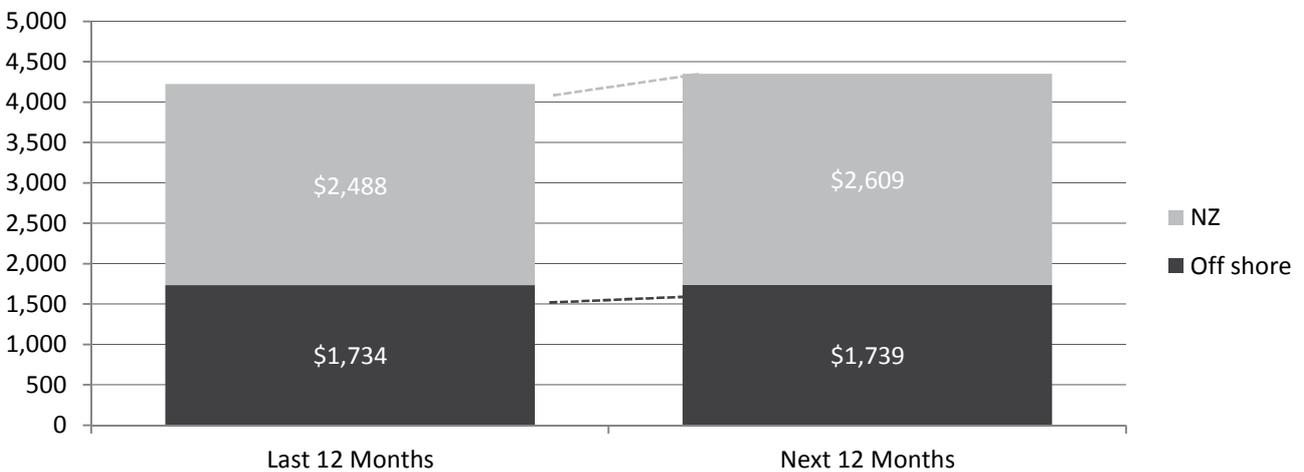
Online: New Zealand vs Off Shore

New Zealand merchants accounted for 60% of online spend representing a 10.4% increase compared to the previous month and a 17.2% increase against the same period last year.

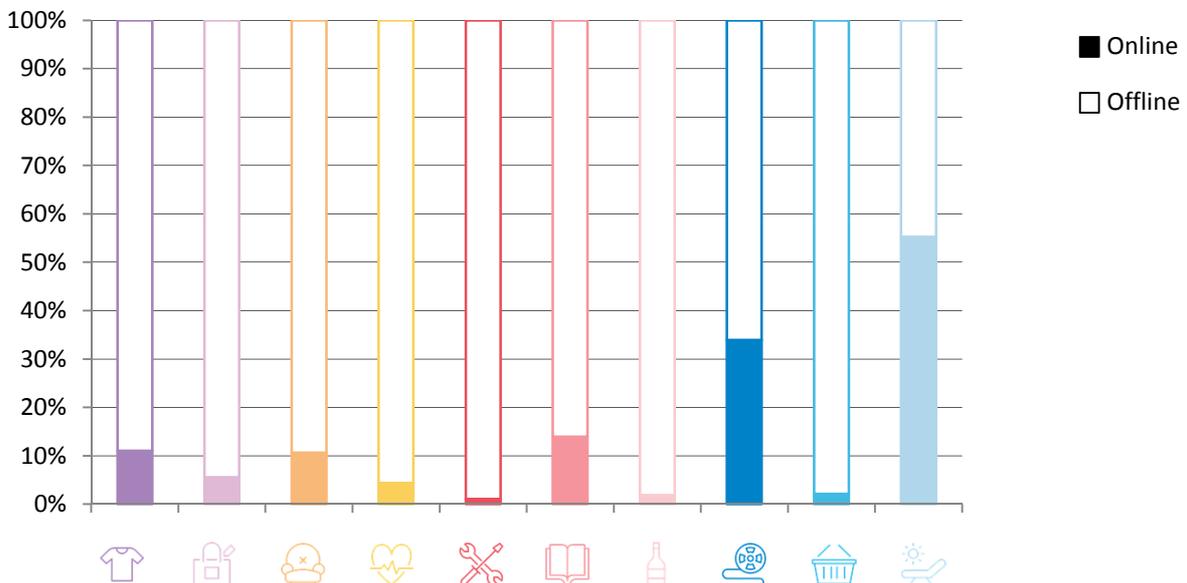
For New Zealand merchants the only increases in spend compared to the previous month was in the Travel & Accommodation (+53.6%) category. Categories to experience the greatest decreases in spending were Furniture, Appliances & Electronics (-52.0%), Liquor Stores (-47.5%) and Department Stores (-44.9%). Compared to the previous year, spend decreased by 9.5% in Health Goods & Services and by 41.2% in Home & Building Supplies but increased in every other category. The category with the greatest year on year increase was Books & Stationery (+212.0%).

Spend with Off Shore merchants increased by 2.9% when compared to the previous month and 13.6% compared to the same period last year. Spend with Off Shore merchants increased the most in Travel & Accommodation(+29.3%), month on month and Department Stores (+155.4%) year on year.

Projected total online spend (\$M)



% share of category spend



Online retail market summary New Zealand vs Off Shore merchants

January 2017

Retailer Category	Month Total \$M		% Change vs Prior Month		% Change vs Last Year	
	NZ	Off Shore	NZ	Off Shore	NZ	Off Shore
 Clothing & Footwear	6.1	15.1	-18.1%	-19.5%	8.2%	17.8%
 Department Stores	7.9	2.5	-44.9%	-19.4%	27.3%	155.4%
 Furniture, Appliances & Electronics	5.1	16.4	-52.0%	-11.8%	9.2%	35.7%
 Health Goods & Services	2.9	3.5	-33.5%	4.6%	-9.5%	17.4%
 Home & Building Supplies	1.7	0.5	-42.1%	-29.6%	-41.2%	10.0%
 Books & Stationery Stores	4.2	3.3	-24.9%	-17.8%	212.0%	8.7%
 Liquor Stores	1.1	0.4	-47.5%	-65.7%	0.9%	26.7%
 Recreation & Entertainment	29.3	26.5	-9.8%	-6.0%	9.2%	35.3%
 Supermarkets & Food Retailers	21.2	3.8	-11.4%	-12.4%	22.9%	21.5%
 Travel & Accommodation	125.3	62.3	53.6%	29.3%	18.7%	-0.9%
 Total Retail Spend	204.9	134.5	10.4%	2.9%	17.2%	13.6%

Online retailer total revenue by category (\$M)



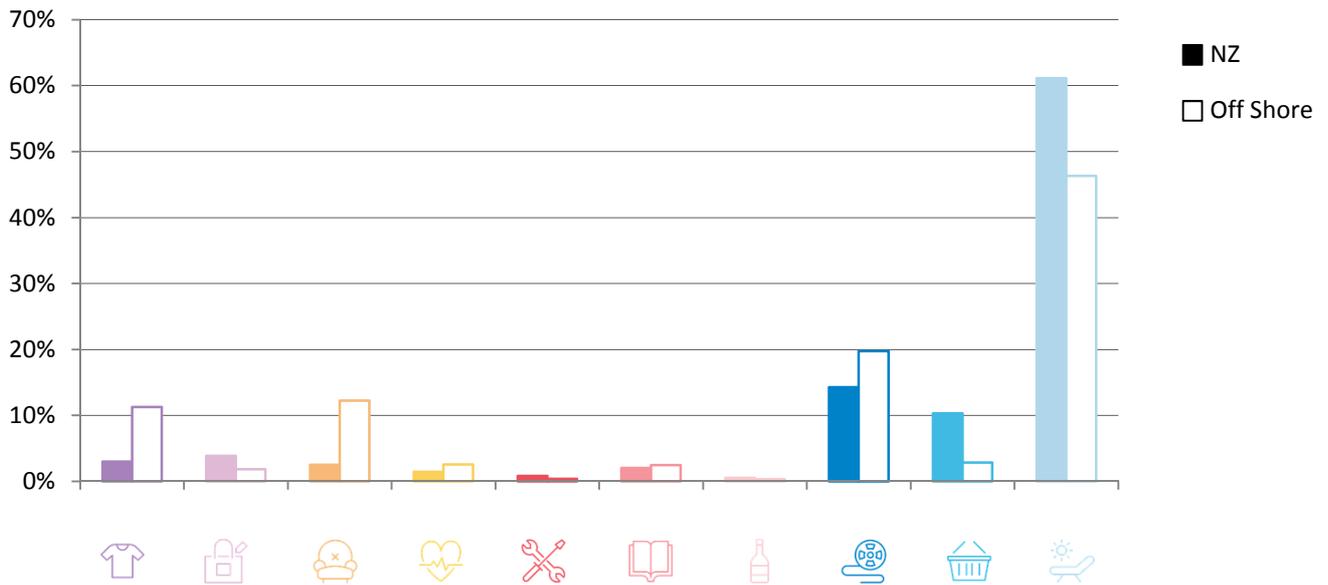
Monthly online revenue change YOY



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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