
















Value of electronic card transactions within retail categories

Period ending 28/02/2017

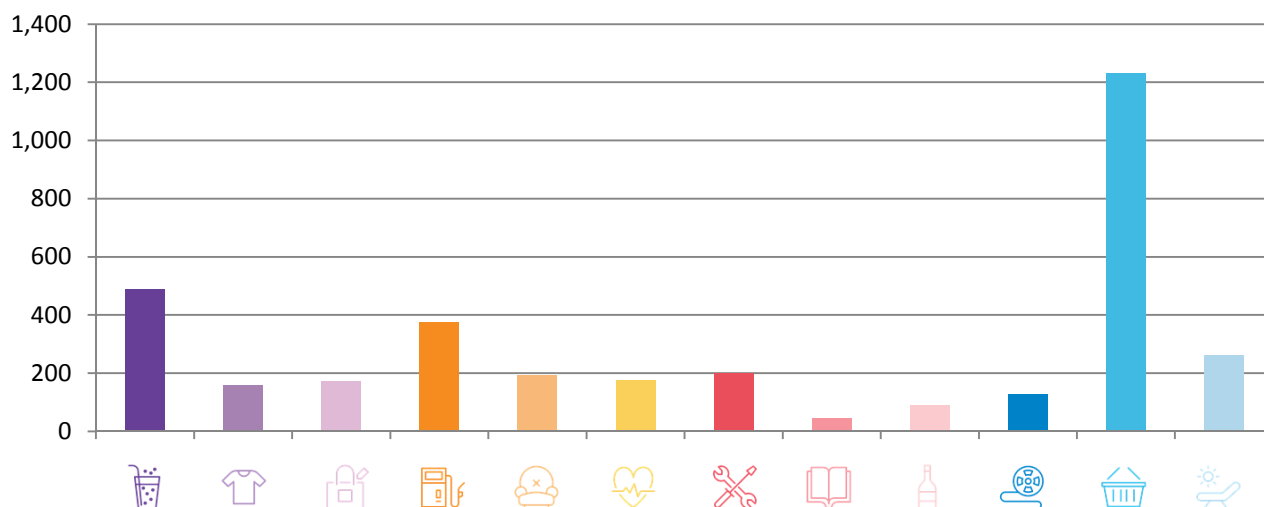
Total retail spend in New Zealand for the 28 days ending 28 February 2017 was \$3.5 billion. This is an increase (1.7%) compared to January 2017 and an increase of 2.0% when compared to the same period last year.

Spending was up in eight of the twelve categories year on year. The categories showing the greatest increase in spend were Fuel & Service Stations (+10.8%) and Home & Building Supplies (6.7%) while Recreation & Entertainment saw the greatest decrease in spend (-4.5%).

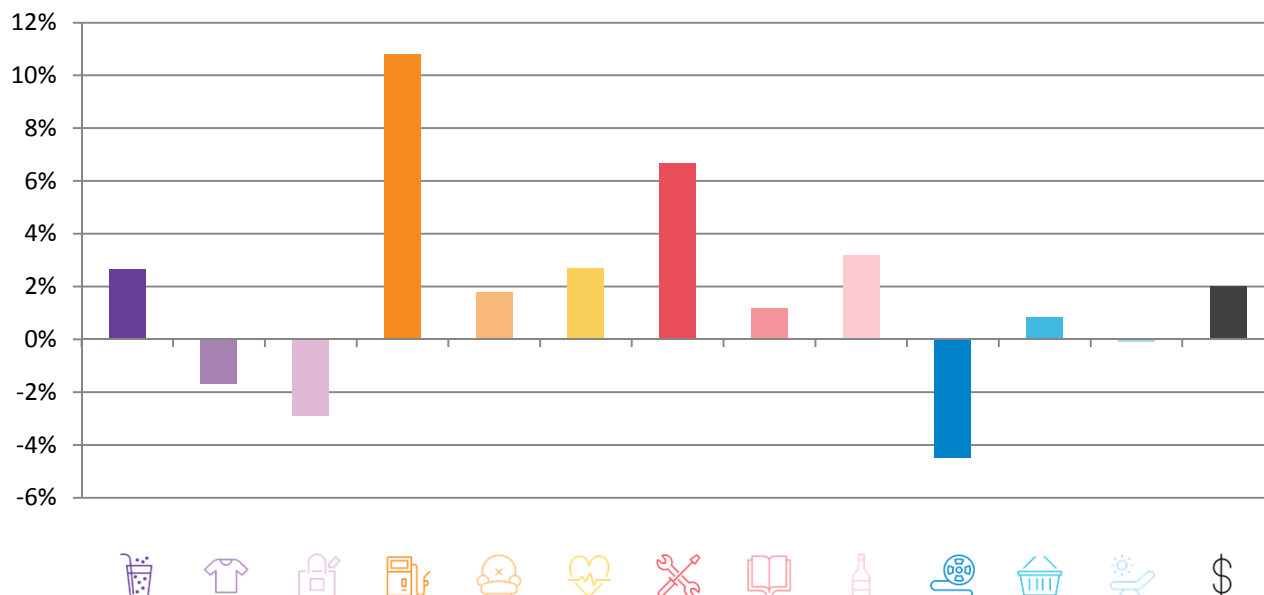
Compared to the previous month, six out of the twelve categories experienced an increase in retail spend. Health Goods & Services showed a significant increase of 23.7% and Clothing & Footwear showed the greatest decrease in spend, decreasing by 8.8%.

Retailer Category	Month Total \$M	% Change vs Prior Month	% Change vs Last Year	% Share
 Cafés, Restaurants & Bars	491	1.1%	2.7%	13.9%
 Clothing & Footwear	161	-8.8%	-1.7%	4.6%
 Department Stores	171	-5.3%	-2.9%	4.9%
 Fuel & Service Stations	377	4.9%	10.8%	10.7%
 Furniture, Appliances & Electronics	192	4.0%	1.8%	5.5%
 Health Goods & Services	175	23.7%	2.7%	5.0%
 Home & Building Supplies	200	-3.2%	6.7%	5.7%
 Books & Stationery Stores	47	-6.2%	1.2%	1.3%
 Liquor Stores	90	5.5%	3.2%	2.5%
 Recreation & Entertainment	128	-6.9%	-4.5%	3.6%
 Supermarkets & Food Retailers	1,230	3.9%	0.8%	34.9%
 Travel & Accommodation	262	-4.7%	-0.1%	7.4%
 TOTAL RETAIL SPEND	3,523	1.7%	2.0%	100%

Monthly retail spend by category (\$M)



Change vs last year



Quarterly summary

February 2017














The total quarterly retail spend for the 91 days ending 28 February 2017 was \$12.3 billion. This is an increase of 5.6% when compared to the previous quarter and an increase of 2.8% when compared to the same period last year.

When compared to the previous quarter, spend increased the most in the Books & Stationary Stores (+26.6%) category, followed by the Department Stores (+23.2%) and Liquor Stores (19.1%) categories. There were three categories that decreased in spend when compared to the previous quarter, these were Health Goods & Services (-7.5%), Recreation & Entertainment (-6.2%) and Home & Building Supplies (-1.0%).

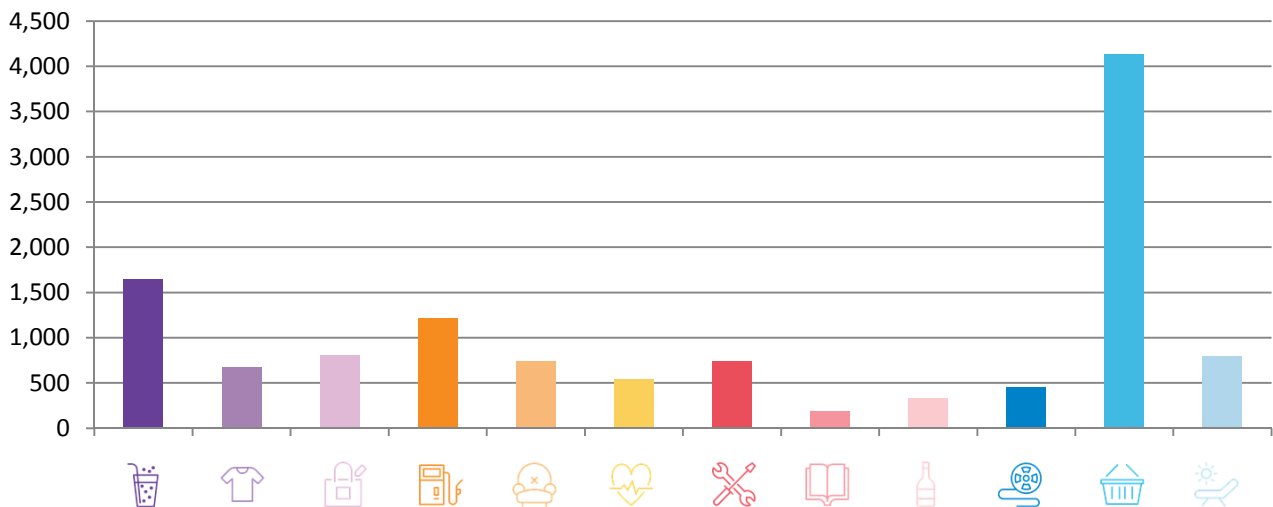
Compared to the same quarter of the previous year spending increased in all but two categories, Department Stores (-1.0%) and Recreation & Entertainment (-0.1%). The greatest year on year increases came from Fuel & Service Stations (+7.4%) and Home & Building Supplies (+6.0%).

Quarterly summary

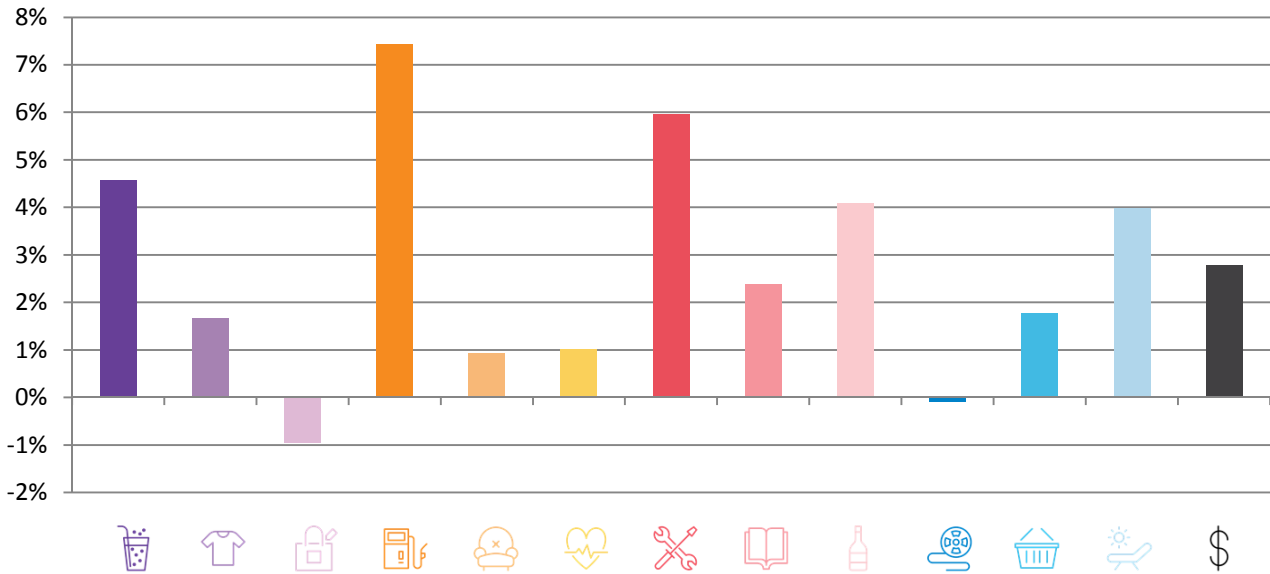
February 2017

Retailer Category	Quarter Total \$M	% Change vs Prior Quarter	% Change vs Last Year	% Share
 Cafés, Restaurants & Bars	1,647	1.9%	4.6%	13.4%
 Clothing & Footwear	676	11.4%	1.7%	5.5%
 Department Stores	801	23.2%	-1.0%	6.5%
 Fuel & Service Stations	1,220	9.5%	7.4%	9.9%
 Furniture, Appliances & Electronics	746	8.0%	0.9%	6.1%
 Health Goods & Services	538	-7.5%	1.0%	4.4%
 Home & Building Supplies	738	-1.0%	6.0%	6.0%
 Books & Stationery Stores	183	26.6%	2.4%	1.5%
 Liquor Stores	331	19.1%	4.1%	2.7%
 Recreation & Entertainment	455	-6.2%	-0.1%	3.7%
 Supermarkets & Food Retailers	4,135	4.8%	1.8%	33.7%
 Travel & Accommodation	793	5.3%	4.0%	6.5%
 TOTAL RETAIL SPEND	12,264	5.6%	2.8%	100%

Quarterly spend by category (\$M)



Change vs last year



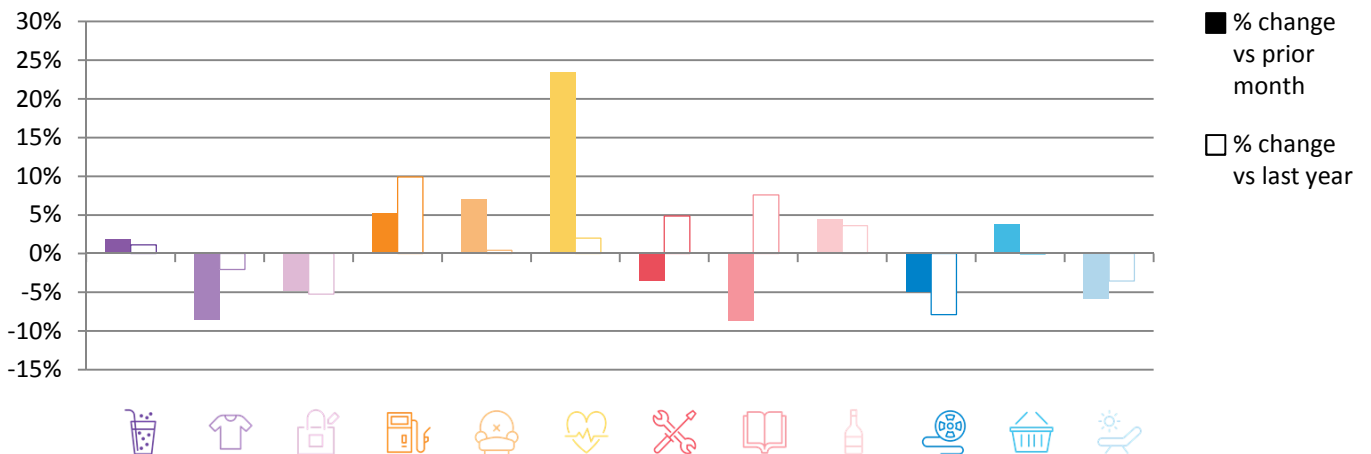
Selected regions of interest

February 2017

Monthly trends Auckland

Spending in Auckland followed national trends again in February. Compared to the same month last year spending increased in eight of the twelve categories. The greatest increase in spend was seen in the Fuel & Service Station (+9.9%) and Books & Stationery Stores (+7.6%) categories year on year. The biggest decrease in spend was seen in the Recreation & Entertainment category, decreasing by 7.9%.

Compared to the previous month, Health Goods & Services had a large increase in spend, increasing by 23.5%. However, six categories experienced decreases in spend when compared to January 2017, these decreases were led by the Books & Stationery Stores (-8.7%) and Clothing & Footwear (-8.5%) categories.

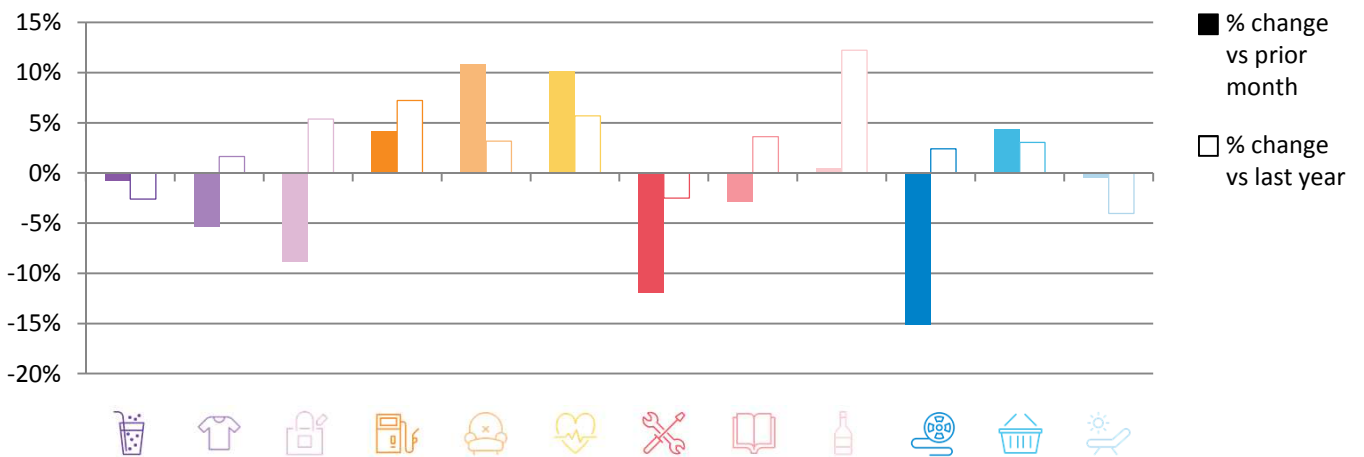


Monthly trends Marlborough

Retail spend in the Marlborough region for the 28 days ending 28/02/2017 was \$35.0 million. This represents an increase of 0.6% against the previous month and an increase of 2.2% year on year.

Marlborough’s largest year on year increase in spend came from the Liquor Stores category (+12.2%), while the greatest decrease in spend was seen in the Travel & Accommodation category (-4.0%).

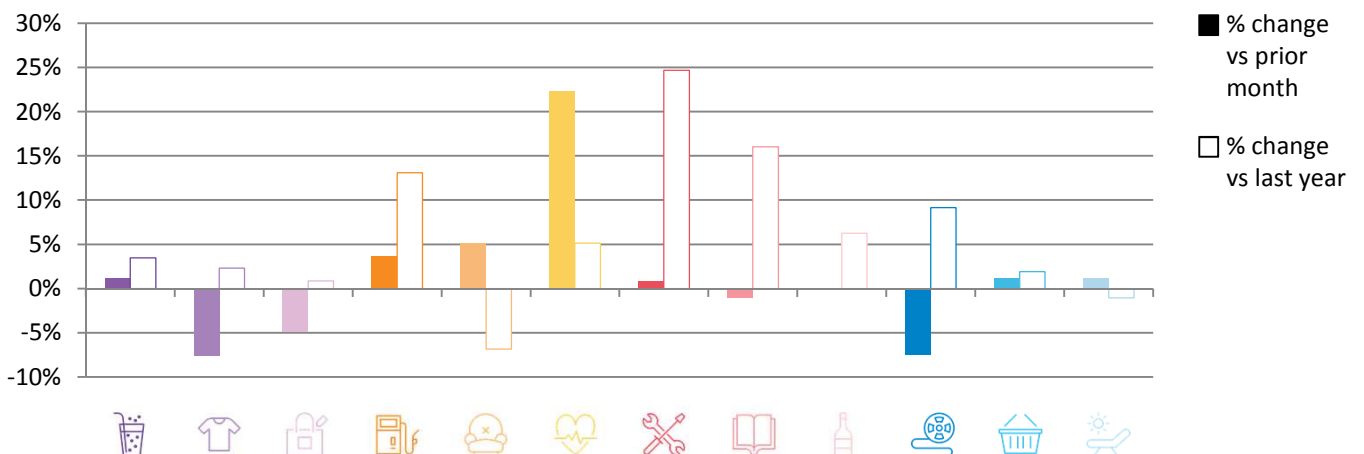
There were mixed results when looking at spending month on month with large increases and decreases over the categories. Furniture, Appliances & Electronics (+10.9%) experienced the greatest increase in spend, followed closely by Health Goods & Services (+10.2%). Recreation & Entertainment (-15.1%) saw the largest decrease in spend which was followed by the Home & Building Supplies category which decreased by 12.0%.



Monthly trends Northland

Spending in Northland was up in all but two categories year on year with the decreases in spend being seen in Furniture, Appliances & Electronics (-6.9%) and Travel & Accommodation (-1.1%) categories. There were large increases in spending when compared to February 2016, this increase was led by the Home & Building Supplies (+24.7%) category and followed by Books & Stationery Stores (+16.0%) and Fuel & Service Stations (13.1%) categories.

Spending increased in eight of the twelve categories when compared to the previous month. The greatest increase was seen in the Health Goods & Services category (+22.4%) and the largest decreases in spend were seen in the Clothing & Footwear (-7.6%) and Recreation & Entertainment (-7.5%) categories.



↑ Going up this month

The greatest increase in spending this month was seen in the Health Goods & Services category, up 23.7%.

All regions experienced increases in spend this month. The Tasman region leading the way increasing spend by 3.7%.

6

Categories up

16

Regions up

↓ Going down this month

Six categories were down when compared to the previous month. The greatest decrease was seen in Clothing & Footwear which decreased by 8.8%.

No regions experienced any decreases in spend when compared to January 2017.

6

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



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Online retail market summary

Period ending 28/02/2017

Total online retail spend in New Zealand for the 28 days ending 28 February 2017 was \$328 million. This represents an increase of 9.2% year on year and a decrease of 2.7% against the previous month.

Online spending was up across all ten categories year on year. Books & Stationery Stores saw the largest increase (+78.6%), followed by Liquor Stores (+30.1%) and Furniture, Appliances & Electronics (+29.0%).

Compared to the previous month, three categories experienced spending decreases. The greatest decrease in spend was seen in Department Stores (-13.0%), followed by Travel & Accommodation (-7.9%) and Clothing & Footwear (-3.3%). The greatest increases in spend when compared to January 2017 were in the Home & Building Supplies (+50.4%) and Liquor Stores (+30.1%) categories.

Online Retailer Category	Month Total \$M	% Change vs Prior Month	% Change vs Last Year	% Share
 Clothing & Footwear	20.56	-3.3%	20.1%	6.3
 Department Stores	8.99	-13.0%	19.1%	2.7
 Furniture, Appliances & Electronics	23.43	3.8%	29.0%	7.1
 Health Goods & Services	7.62	18.5%	19.6%	2.32
 Home & Building Supplies	3.40	50.4%	11.3%	1.04
 Books & Stationery Stores	7.78	3.7%	78.6%	2.37
 Liquor Stores	1.90	30.1%	30.1%	0.58
 Recreation & Entertainment	55.62	1.1%	12.4%	16.9
 Supermarkets & Food Retailers	27.53	12.6%	13.2%	8.4
 Travel & Accommodation	171.44	-7.9%	1.6%	52.2
 Total Online Retail Spend	328.27	-2.7%	9.2%	100.0

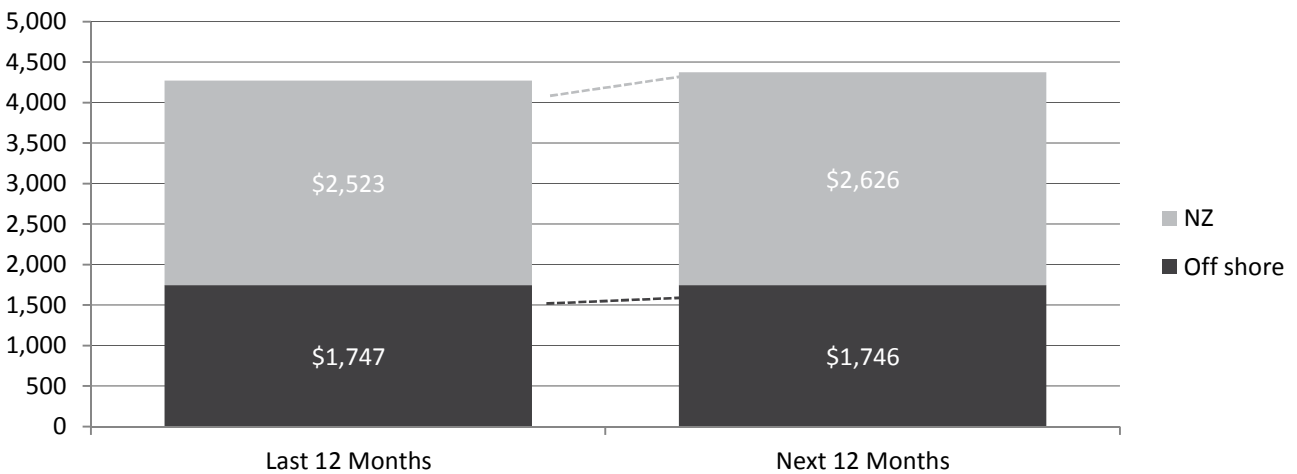
Online: New Zealand vs Off Shore

New Zealand merchants accounted for 60.5% of online spend representing a 2.6% decrease compared to the previous month and a 10.0% increase against the same period last year.

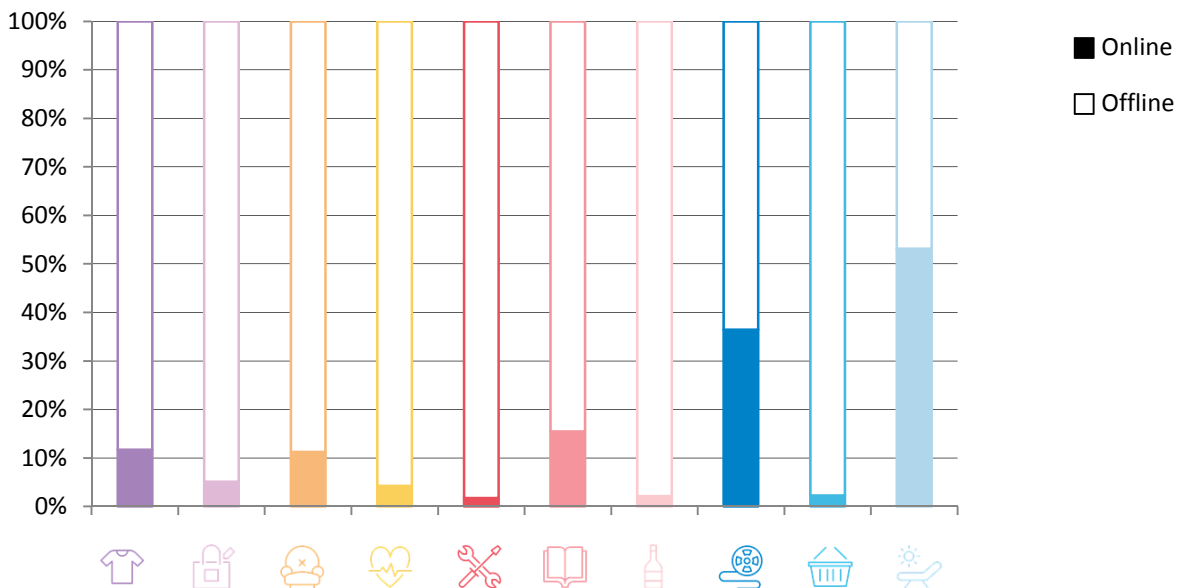
For New Zealand merchants Home & Building Supplies had the greatest increase in spend when compared to the previous month, increasing by 56.9%. The greatest monthly decrease in spend was seen in Travel & Accommodation (-10.9%). Compared to the previous year, no categories experienced any decreases in spend. The Books & Stationery Stores category led the way with a 272.7% increase in spend year on year.

Spend with Off Shore merchants decreased by 2.9% when compared to the previous month and increased by 8.1% when compared to the same period last year. Spend with Off Shore merchants increased the most in Home & Building Supplies for both month on month and year on year spend, increasing by 29.0% and 67.2%, respectively.

Projected total online spend (\$M)














% share of category spend

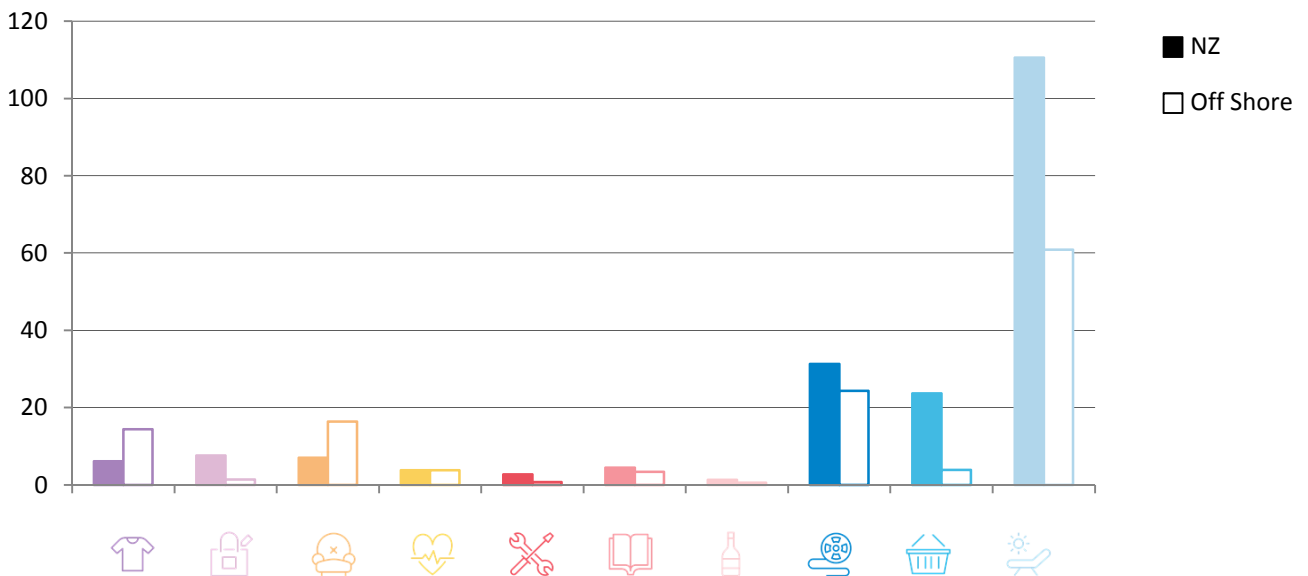


Online retail market summary New Zealand vs Off Shore merchants

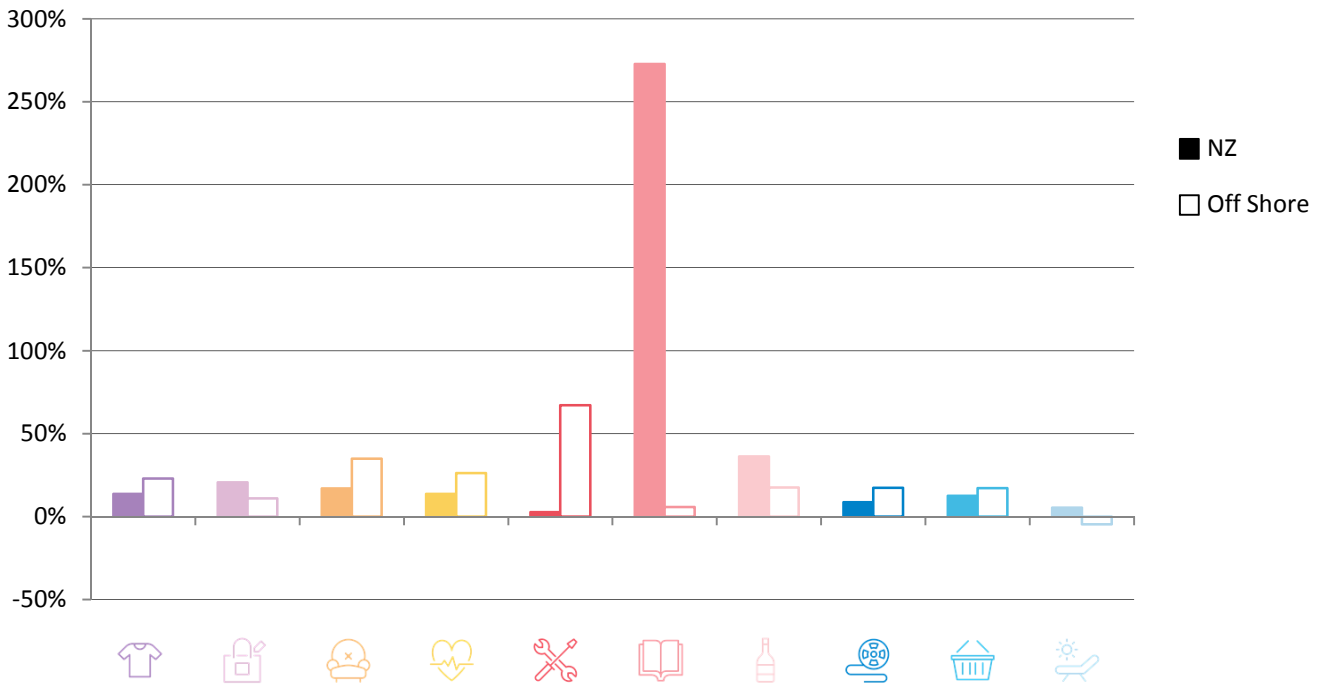
February 2017

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	14.4	-1.7%	-4.0%	13.8%	23.1%
 Department Stores	7.6	1.4	-2.5%	-45.8%	20.6%	11.1%
 Furniture, Appliances & Electronics	7.0	16.4	10.1%	1.3%	17.0%	34.9%
 Health Goods & Services	3.8	3.8	25.7%	12.1%	13.7%	26.2%
 Home & Building Supplies	2.7	0.7	56.9%	29.0%	2.8%	67.2%
 Books & Stationery Stores	4.4	3.4	4.6%	2.7%	272.7%	5.9%
 Liquor Stores	1.3	0.6	36.1%	17.5%	36.2%	17.5%
 Recreation & Entertainment	31.3	24.3	9.0%	-7.5%	8.8%	17.3%
 Supermarkets & Food Retailers	23.7	3.9	14.6%	1.8%	12.6%	17.3%
 Travel & Accommodation	110.6	60.8	-10.9%	-1.8%	5.4%	-4.6%
 Total Retail Spend	198.6	129.6	-2.6%	-2.9%	10.0%	8.1%

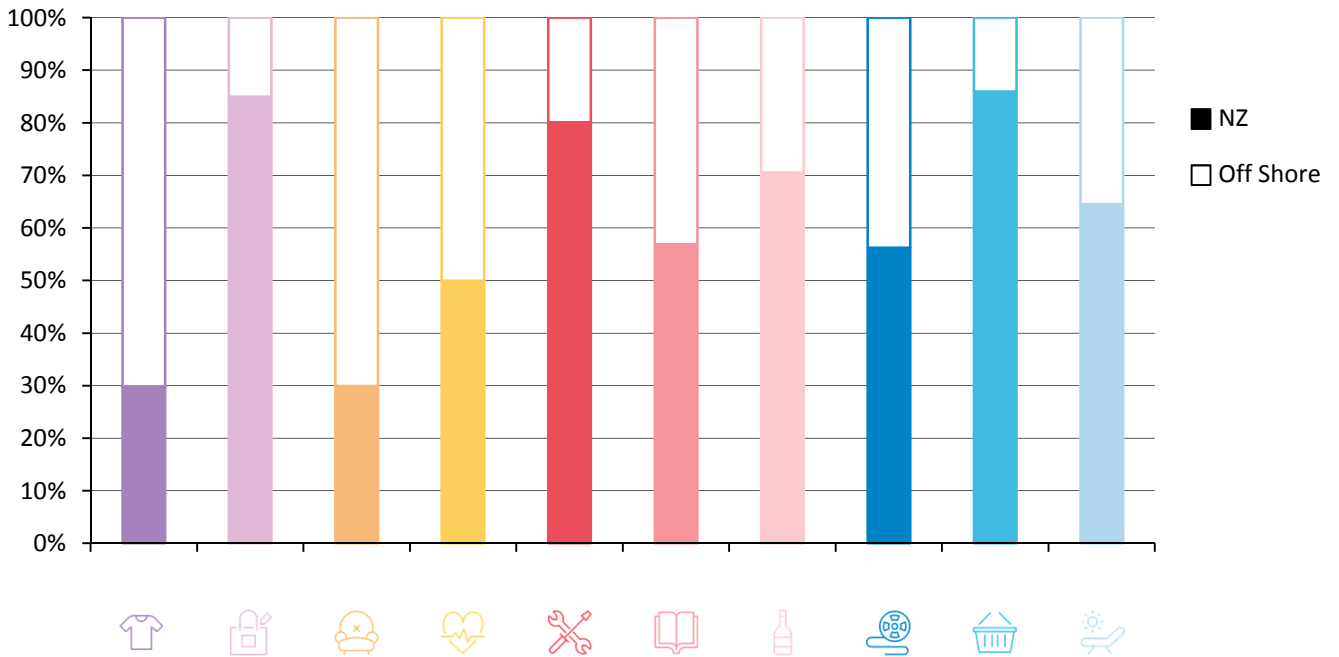
Online retailer total revenue by category (\$M)



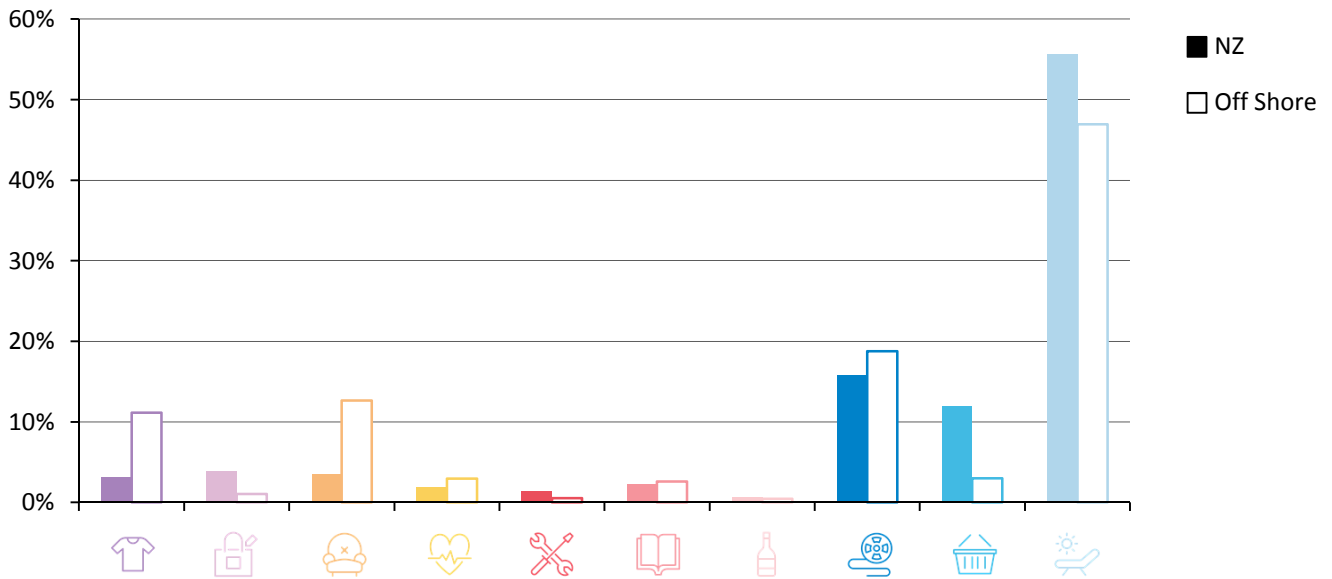
Monthly online revenue change YOY



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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