
















Value of electronic card transactions within retail categories

Period ending 28/04/2017

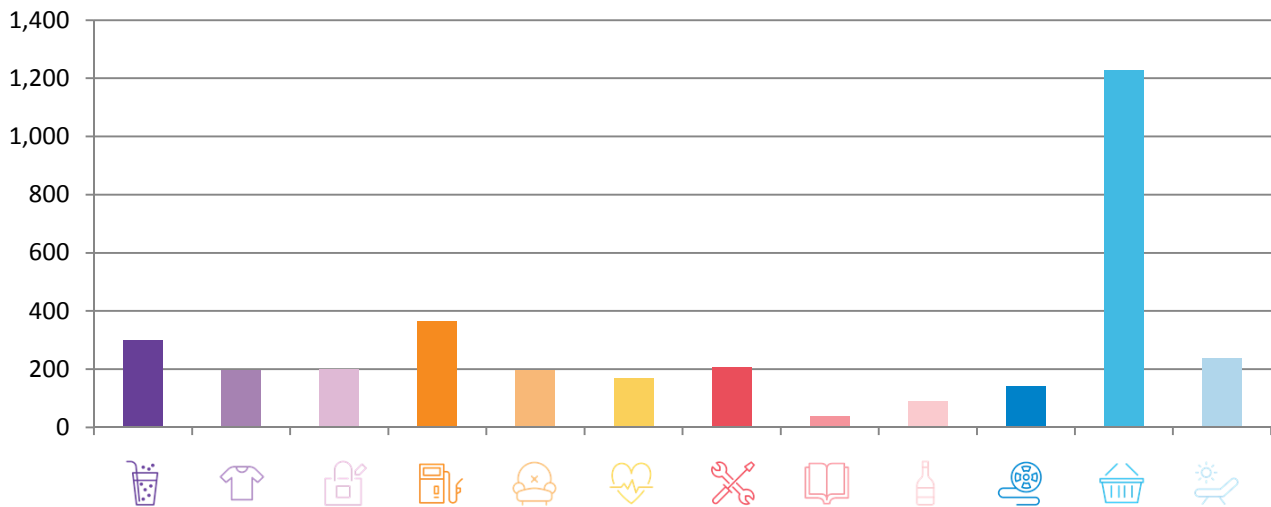
Total retail spend in New Zealand for the 28 days ending 28 April 2017 was \$3.4 billion. This was an increase of 1.4% compared to March and an increase of 2.1% when compared to the same period last year.

Spending was up in seven of the twelve categories year on year. The category showing the greatest increase in spend was Fuel & Service Stations (+8.5%), while Books & Stationery Stores saw the greatest decrease in spend (-12.4%).

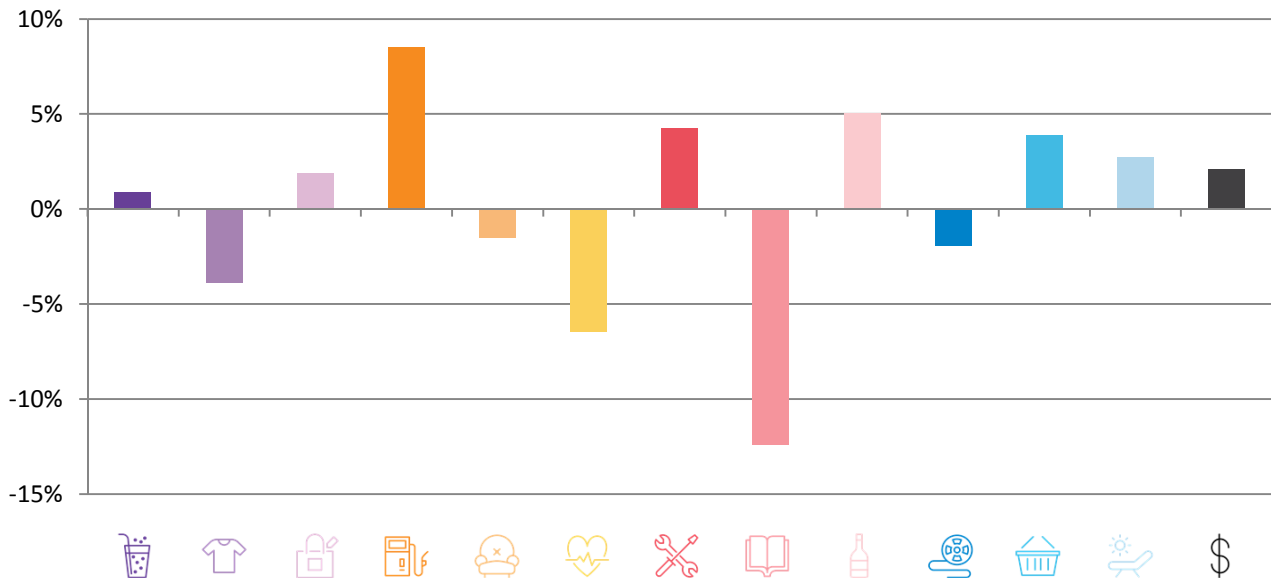
Compared to the previous month, seven categories experienced increases in spend. The largest increase was seen in Department Stores (+16.0%), followed by Recreation & Entertainment (+9.2%) and Clothing & Footwear (+8.8%). The Books & Stationery Stores (-9.3%) and Health Goods & Services (-9.0%) categories saw the largest decreases in monthly spend.

Retailer Category	Month Total \$M	% Change vs Prior Month	% Change vs Last Year	% Share
 Cafés, Restaurants & Bars	300	2.0%	0.9%	8.9%
 Clothing & Footwear	196	8.8%	-3.9%	5.8%
 Department Stores	201	16.0%	1.9%	6.0%
 Fuel & Service Stations	366	0.0%	8.5%	10.9%
 Furniture, Appliances & Electronics	196	-0.7%	-1.5%	5.8%
 Health Goods & Services	168	-9.0%	-6.4%	5.0%
 Home & Building Supplies	207	4.8%	4.2%	6.1%
 Books & Stationery Stores	39	-9.3%	-12.4%	1.2%
 Liquor Stores	91	0.7%	5.0%	2.7%
 Recreation & Entertainment	141	9.2%	-1.9%	4.2%
 Supermarkets & Food Retailers	1,227	1.6%	3.9%	36.4%
 Travel & Accommodation	238	-8.1%	2.7%	7.1%
 TOTAL RETAIL SPEND	3,370	1.4%	2.1%	100%

Monthly retail spend by category (\$M)



Change vs last year



Quarterly summary

April 2017














The total quarterly retail spend for the 91 days ending 28 April 2017 was \$10.9 billion. This is a decrease of -7.7% when compared to the previous quarter, and an increase of 2.2% when compared to the same period last year.

Nine of the twelve categories experienced decreases in spend when compared to the previous quarter. The largest decreases in spend were seen in the Department Stores (-31.8%) and Books & Stationary Stores (-23.8%) categories. Travel & Accommodation (+10.3%) saw the biggest increase in spend.

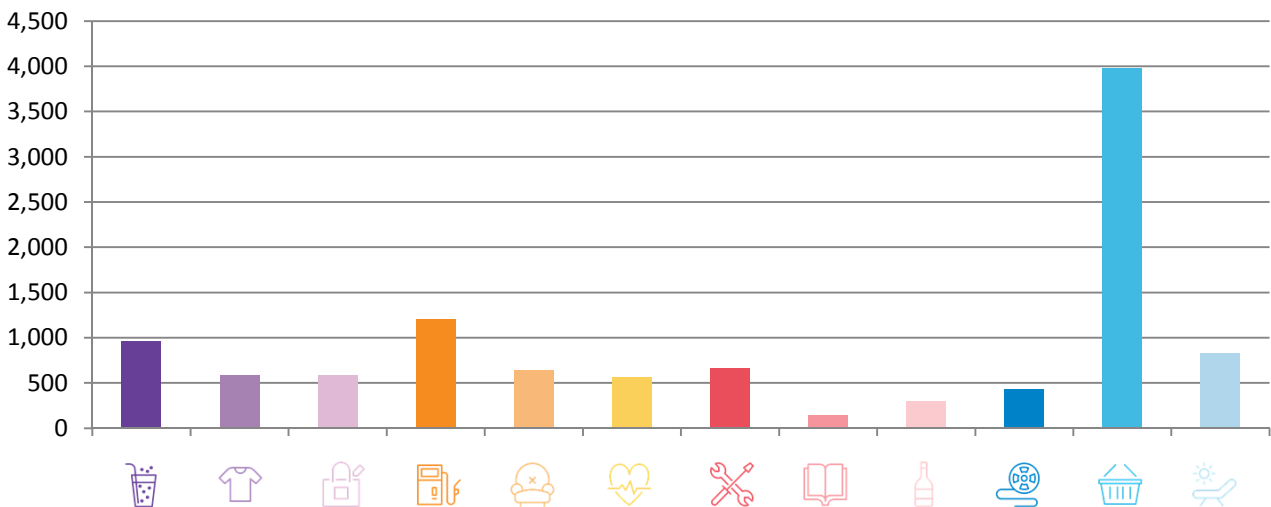
Compared to the same quarter of the previous year, spending increased in all but four categories. The greatest year on year increase was led by Fuel & Service Stations (+8.6%), whilst Books & Stationary Stores (-4.4%) saw the largest decrease.

Quarterly summary

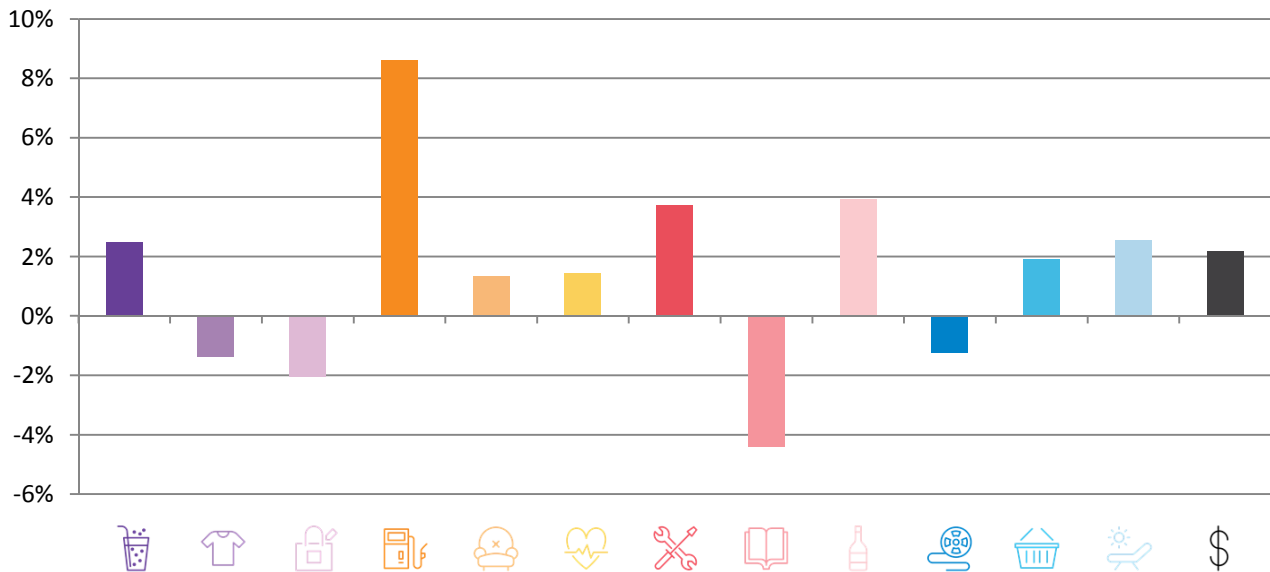
April 2017

Retailer Category	Quarter Total \$M	% Change vs Prior Quarter	% Change vs Last Year	% Share
 Cafés, Restaurants & Bars	961	-2.3%	2.5%	8.8%
 Clothing & Footwear	581	-19.0%	-1.4%	5.3%
 Department Stores	590	-31.8%	-2.1%	5.4%
 Fuel & Service Stations	1,203	0.8%	8.6%	11.0%
 Furniture, Appliances & Electronics	639	-18.4%	1.3%	5.9%
 Health Goods & Services	570	2.7%	1.4%	5.2%
 Home & Building Supplies	664	-14.8%	3.7%	6.1%
 Books & Stationery Stores	142	-23.8%	-4.4%	1.3%
 Liquor Stores	299	-13.8%	3.9%	2.7%
 Recreation & Entertainment	435	-9.5%	-1.2%	4.0%
 Supermarkets & Food Retailers	3,979	-4.5%	1.9%	36.5%
 Travel & Accommodation	829	10.3%	2.5%	7.6%
 TOTAL RETAIL SPEND	10,893	-7.7%	2.2%	100%

Quarterly spend by category (\$M)



Change vs last year



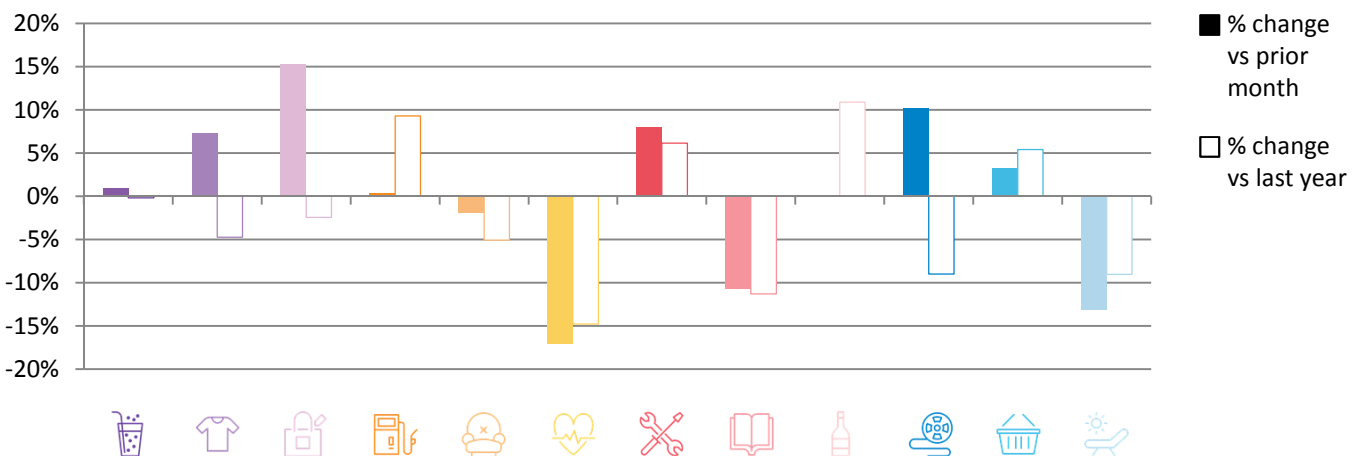
Selected regions of interest

April 2017

Monthly trends Bay of Plenty

Spending in the Bay of Plenty increased in just four of the twelve categories compared to April last year. The greatest increases in spend were seen in the Liquor Stores (+10.9%) and Fuel & Service Station (+9.3%) categories year on year. The biggest decrease in spend was seen in the Health Goods & Services category, decreasing by -14.8%.

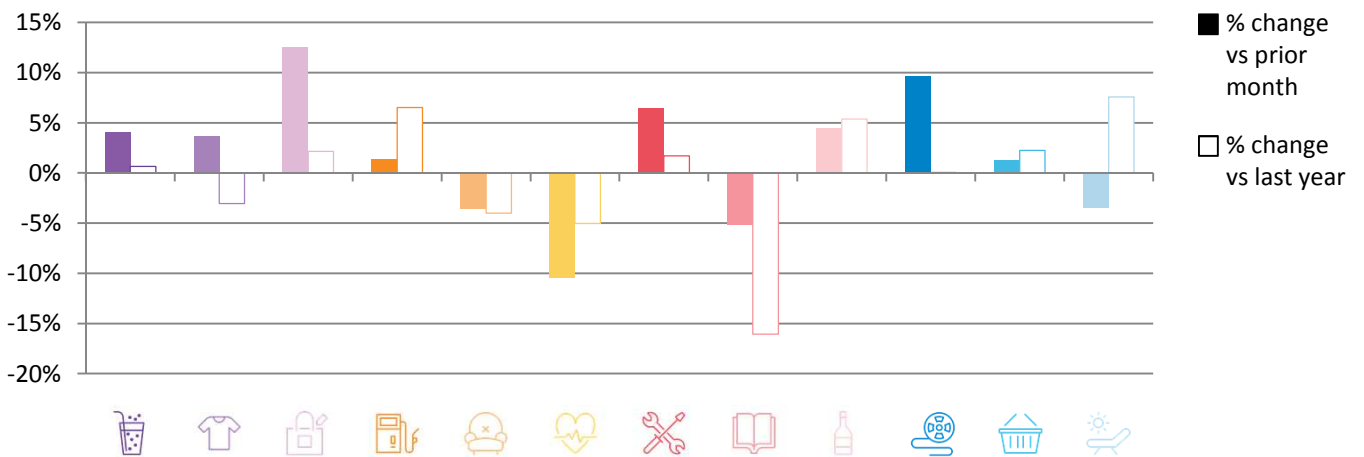
Compared to the previous month of March, seven categories experienced increases in spend. Department Stores had the largest increase in spend, increasing by 15.2%. The greatest decreases in spend were seen in the Health Goods & Services (-17.1%) and Travel & Accommodation (-13.2%) categories.



Monthly trends Canterbury

Spending in Canterbury was up in seven categories year on year. The greatest increases in spend were seen in Travel & Accommodation (+7.6%), Fuel & Service Stations (+6.5%) and Liquor Stores (+5.4%). Books & Stationary Stores (-16.1%) saw the largest decrease in spend compared to the same period last year.

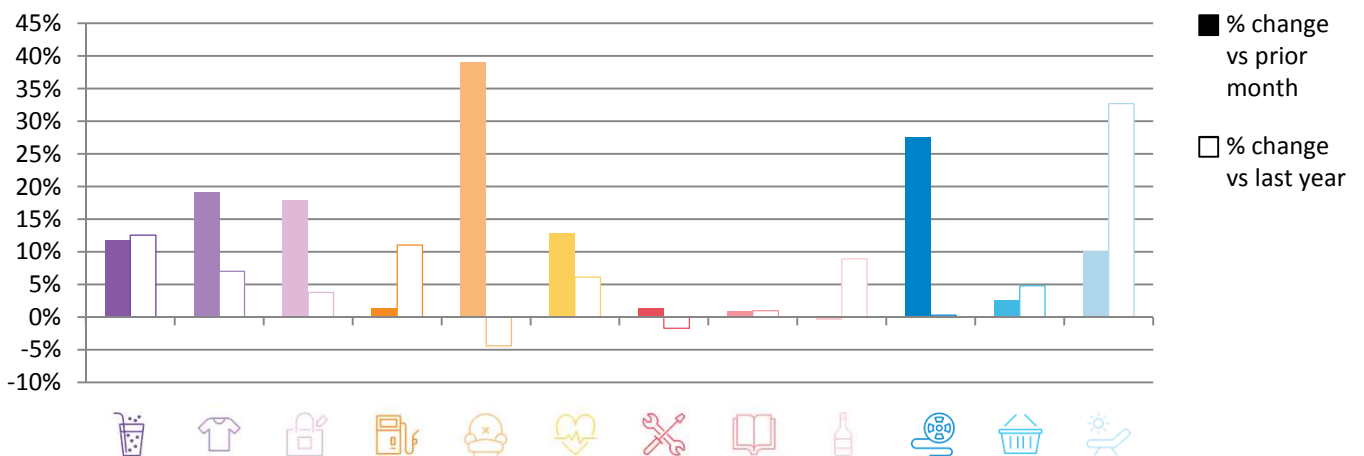
Spending increased in eight of the twelve categories when compared to the previous month of March. The greatest increases were seen in the Department Stores (+12.6%) and Recreation & Entertainment (+9.6%) categories. The Health Goods & Services (-10.4%) category saw the largest decrease in month on month spend.



Monthly trends West Coast

Retail spend in the West Coast region was up in ten of the twelve categories compared to April 2016. The largest increase in spend came from Travel & Accommodation (+32.7%), while the greatest decrease in spend was seen in the Furniture, Appliances & Electronics (-4.4%) category.

Month on month spend was up in all but just one category this month, with the Liquor Stores (-0.4%) category being the exception. Furniture, Appliances & Electronics (+39.0%) experienced the greatest increase in spend, followed by Recreation & Entertainment (+27.5%).



Going up this month

The greatest increase in spending this month was seen in the Department Store category, up 16.0%.

Fifteen of the sixteen regions experienced increases in spend this month compared to March 2017.

8

Categories up

15

Regions up

Going down this month

The largest decrease in spending this month was seen in Health Goods & Services, down -9.0%.

The Tasman region was the only region to experience a decrease in spend this month, down just -0.5%.

4

Categories down

1

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 28/04/2017

Total online retail spend in New Zealand for the 28 days ending 28 April 2017 was \$357 million. This represents an increase of 14.5% year on year and a decrease of -2.5% against the previous month.

Online spending was up in eight of the ten categories year on year. Furniture, Appliances & Electronics (+40.4%) saw the largest increase in spending, while Home & Building Supplies (-13.1%) saw the greatest decrease.

Spending varied compared to the previous month, with six of the ten categories experiencing decreases. The greatest decrease in spend was seen in Home & Building Supplies (-21.4%), whilst Furniture, Appliances & Electronics (+6.6%) has the largest increase in spend.

Online Retailer Category	Month Total \$M	% Change vs Prior Month	% Change vs Last Year	% Share
 Clothing & Footwear	24.8	2.9%	20.3%	6.9
 Department Stores	9.4	-2.2%	21.0%	2.6
 Furniture, Appliances & Electronics	27.3	6.6%	40.4%	7.7
 Health Goods & Services	8.1	-6.4%	4.2%	2.26
 Home & Building Supplies	2.4	-21.4%	-13.1%	0.68
 Books & Stationery Stores	7.4	-2.9%	-7.0%	2.08
 Liquor Stores	1.9	2.3%	4.9%	0.54
 Recreation & Entertainment	67.1	4.8%	22.8%	18.8
 Supermarkets & Food Retailers	30.1	-1.4%	34.6%	8.4
 Travel & Accommodation	178.6	-6.6%	7.1%	50.0
 Total Online Retail Spend	357.3	-2.5%	14.5%	100.0

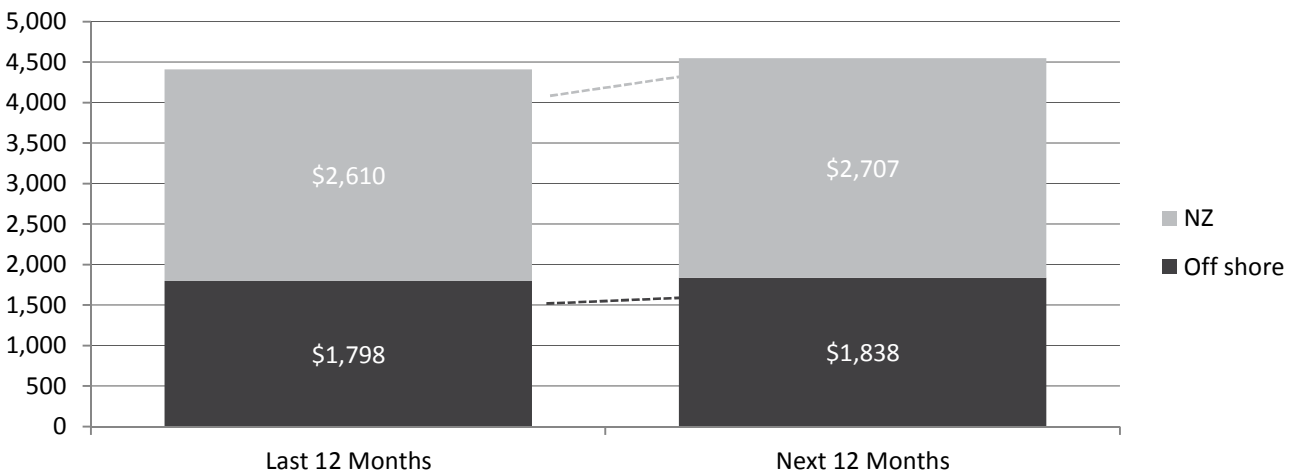
Online: New Zealand vs Off Shore

New Zealand merchants accounted for 57.3% of online spend for the month of April. This is a decrease of -5.9% compared to the previous month, although there was a 15.3% increase against the same period last year.

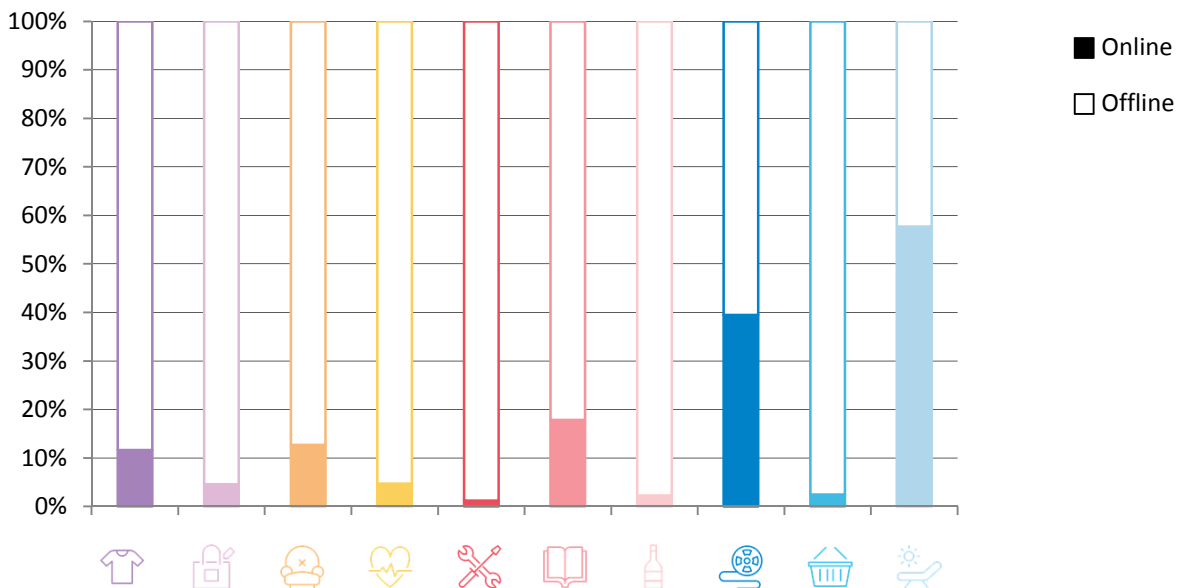
For New Zealand merchants, six of the ten categories saw decreases in spend compared to the previous month. The greatest monthly decrease in spend was seen in Home & Building Supplies (-19.1%), whilst the greatest increase was seen in Clothing & Footwear (+3.5%). Compared to the previous year, six of the categories experienced increases in spend. The Supermarkets & Food Retailers led with a 34.7% increase in spend year on year.

Spend with Off Shore merchants increased by 2.5% when compared to the previous month and increased by 13.5% when compared to the same period last year. Spend with Off Shore merchants increased across all ten categories for year on year spend, lead by the Furniture, Appliances & Electronics (+50.2%) category. Compared to the previous month of March, the greatest increase was seen in Liquor Stores (+12.2%), whilst Home & Building Supplies (-28.0%) saw the largest decrease in spend.

Projected total online spend (\$M)














% share of category spend

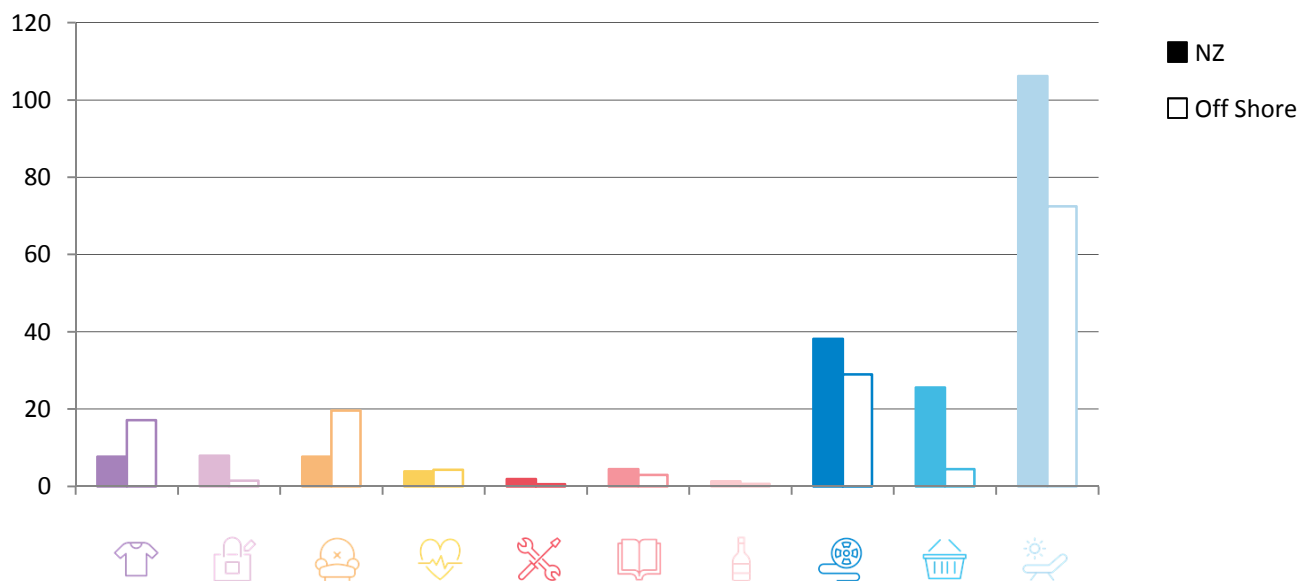


Online retail market summary New Zealand vs Off Shore merchants

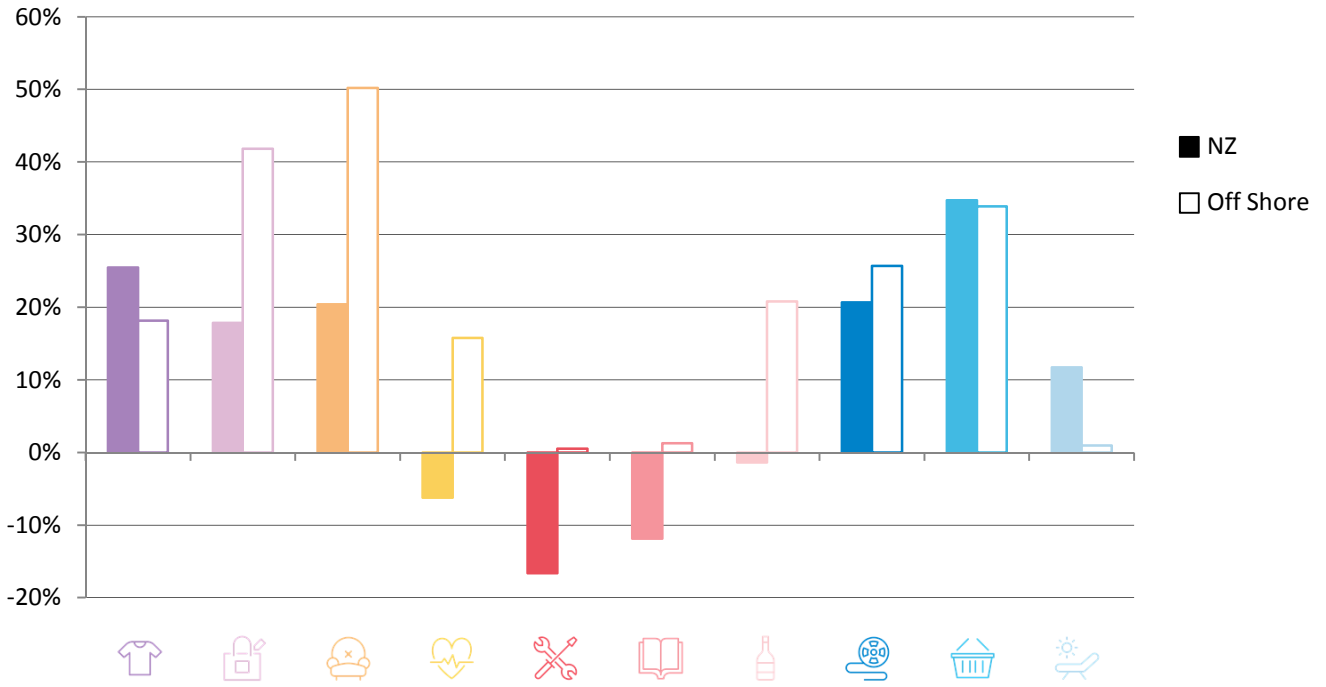
April 2017

Retailer Category	Month Total \$M		% Change vs Prior Month		% Change vs Last Year	
	NZ	Off Shore	NZ	Off Shore	NZ	Off Shore
 Clothing & Footwear	7.7	17.1	3.5%	2.6%	25.4%	18.2%
 Department Stores	8.0	1.4	-1.3%	-7.0%	17.9%	41.8%
 Furniture, Appliances & Electronics	7.7	19.6	-3.1%	11.0%	20.4%	50.2%
 Health Goods & Services	3.8	4.2	3.1%	-13.6%	-6.2%	15.8%
 Home & Building Supplies	1.8	0.6	-19.1%	-28.0%	-16.6%	0.5%
 Books & Stationery Stores	4.5	3.0	2.8%	-10.4%	-11.9%	1.3%
 Liquor Stores	1.3	0.6	-1.8%	12.2%	-1.4%	20.8%
 Recreation & Entertainment	38.1	29.0	2.5%	8.0%	20.7%	25.7%
 Supermarkets & Food Retailers	25.6	4.5	-2.3%	3.5%	34.7%	33.9%
 Travel & Accommodation	106.2	72.5	-10.8%	0.3%	11.7%	1.0%
 Total Retail Spend	204.7	152.5	-5.9%	2.5%	15.3%	13.5%

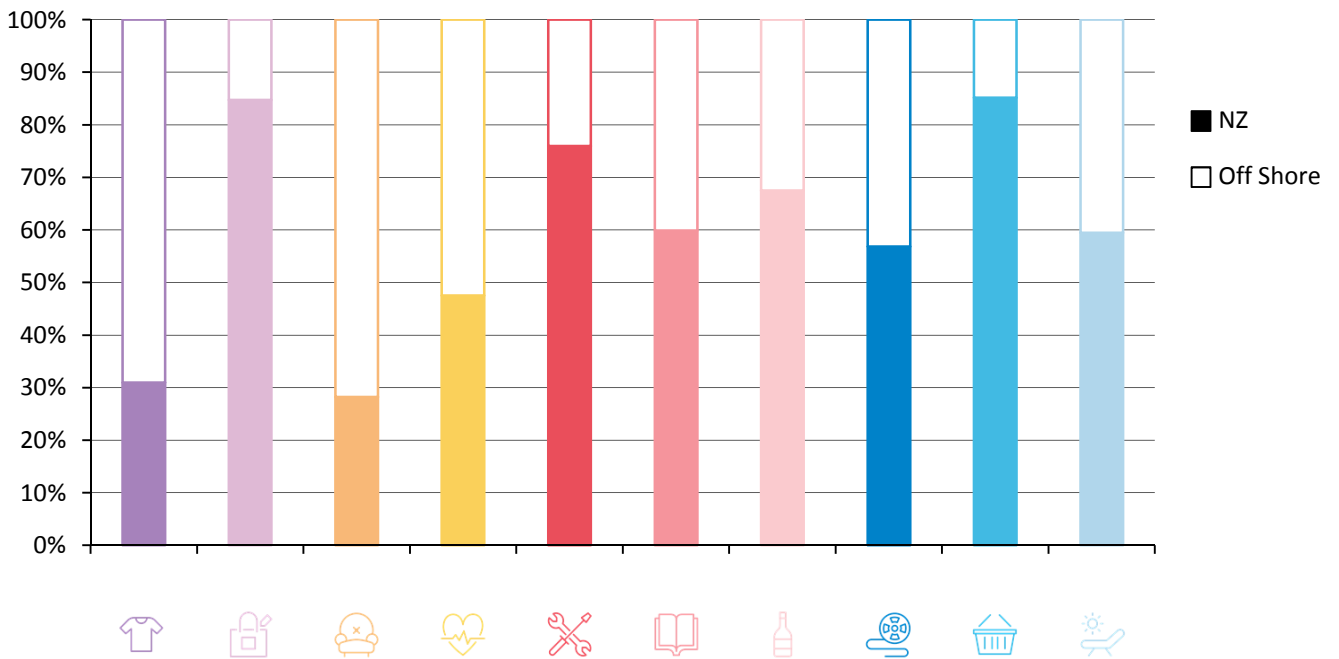
Online retailer total revenue by category (\$M)



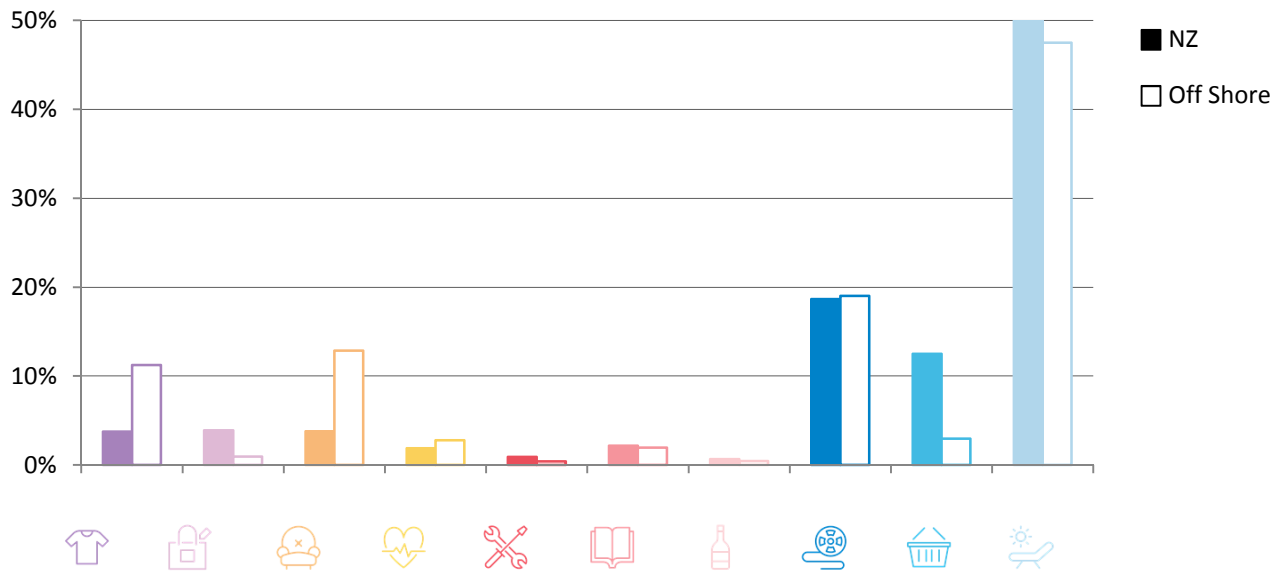
Monthly online revenue change YOY



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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