



Retailwatch














Value of electronic card transactions within retail categories

Period ending 30/06/2017

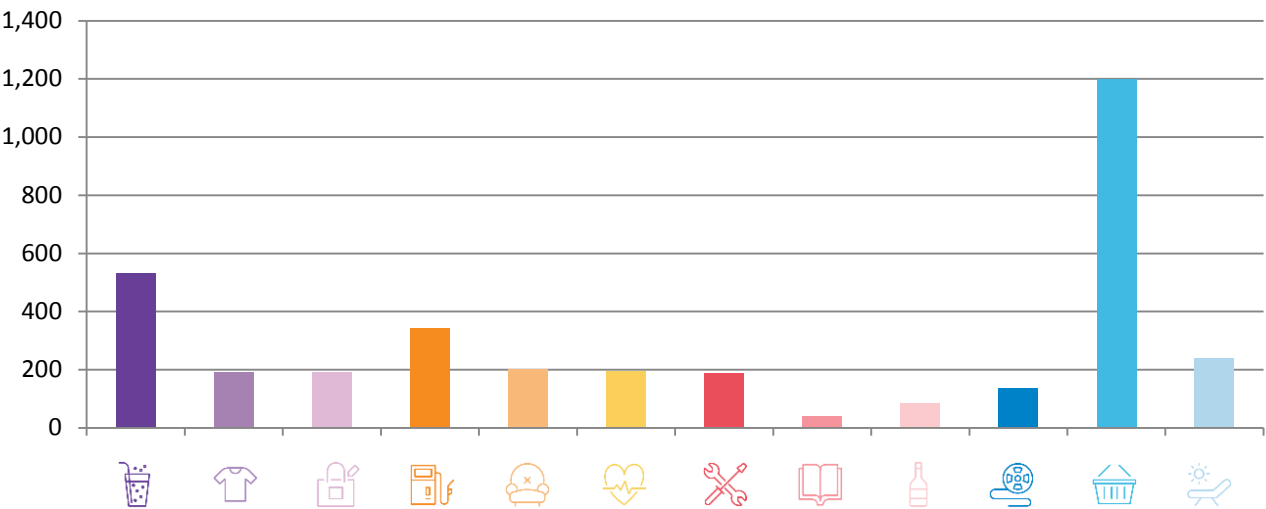
Total retail spend in New Zealand for the 28 days ending 28 June 2017 was \$3.5 billion. This was a decrease of 2.6% compared to May and an increase of 0.2% when compared to the same period last year.

Spending was up in six categories year on year, with the Books & Stationery Stores category exhibiting the greatest decrease of 11.4%.

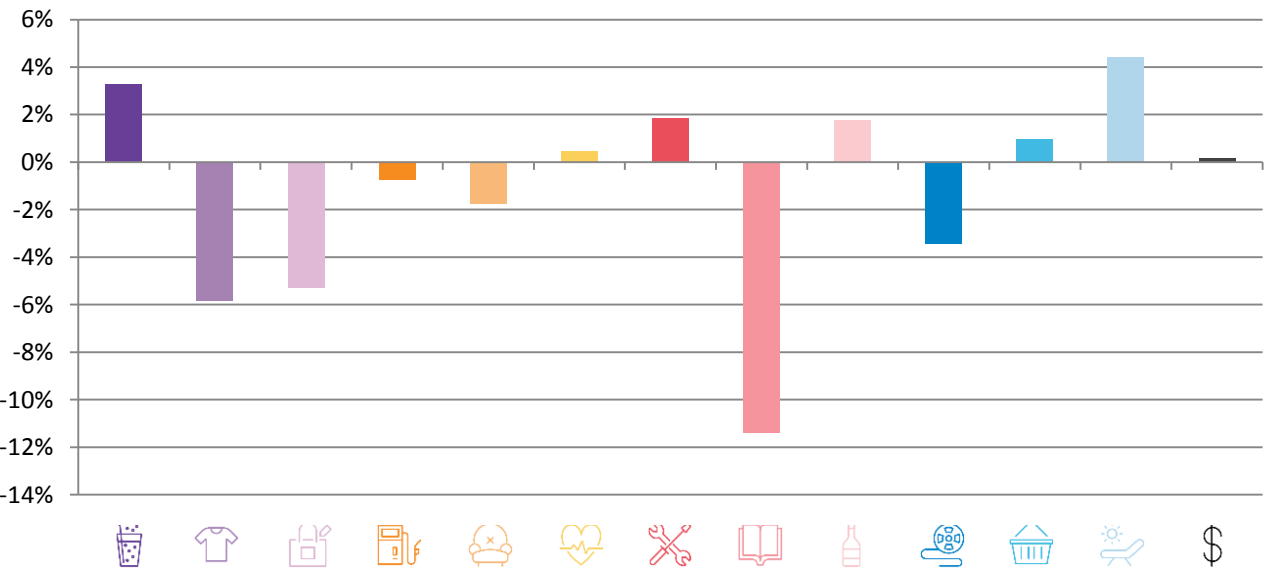
Compared to May, eleven of the twelve categories experienced decreases in spend. The largest decrease was seen in Recreation & Entertainment (-13.2%), followed by Books & Stationery Stores (-10.2%), and Department Stores (-6.9%). Despite the year on year decrease, the Furniture, Appliances & Electronics category saw the only month on month increase (+5.0%).

Retailer Category	Month Total \$M	% Change vs Prior Month	% Change vs Last Year	% Share
 Cafés, Restaurants & Bars	532	-0.1%	3.3%	15.1%
 Clothing & Footwear	190	-5.4%	-5.8%	5.4%
 Department Stores	189	-6.9%	-5.3%	5.4%
 Fuel & Service Stations	341	-2.8%	-0.7%	9.7%
 Furniture, Appliances & Electronics	203	5.0%	-1.8%	5.7%
 Health Goods & Services	194	-4.3%	0.4%	5.5%
 Home & Building Supplies	187	-1.7%	1.8%	5.3%
 Books & Stationery Stores	40	-10.2%	-11.4%	1.1%
 Liquor Stores	85	-0.4%	1.8%	2.4%
 Recreation & Entertainment	135	-13.2%	-3.4%	3.8%
 Supermarkets & Food Retailers	1,197	-1.6%	0.9%	33.9%
 Travel & Accommodation	239	-4.2%	4.4%	6.8%
 TOTAL RETAIL SPEND	3,533	-2.6%	0.2%	100%

Monthly retail spend by category (\$M)



Change vs last year



Quarterly summary

June 2017














The total quarterly retail spend for the 91 days ending 28 June 2017 was \$11.7 billion. This was a decrease of 0.2% when compared to the previous quarter, and an increase of 1.7% when compared to the same period last year.

Six of the twelve categories experienced a decrease in spend when compared to the previous quarter. The largest decrease in spending was in the Books & Stationery Stores category (-12.9%), followed by Travel & Accommodation (-10.9%). Clothing & Footwear (+11.6%) and Department Stores (+10.3%) saw the largest increases in spend.

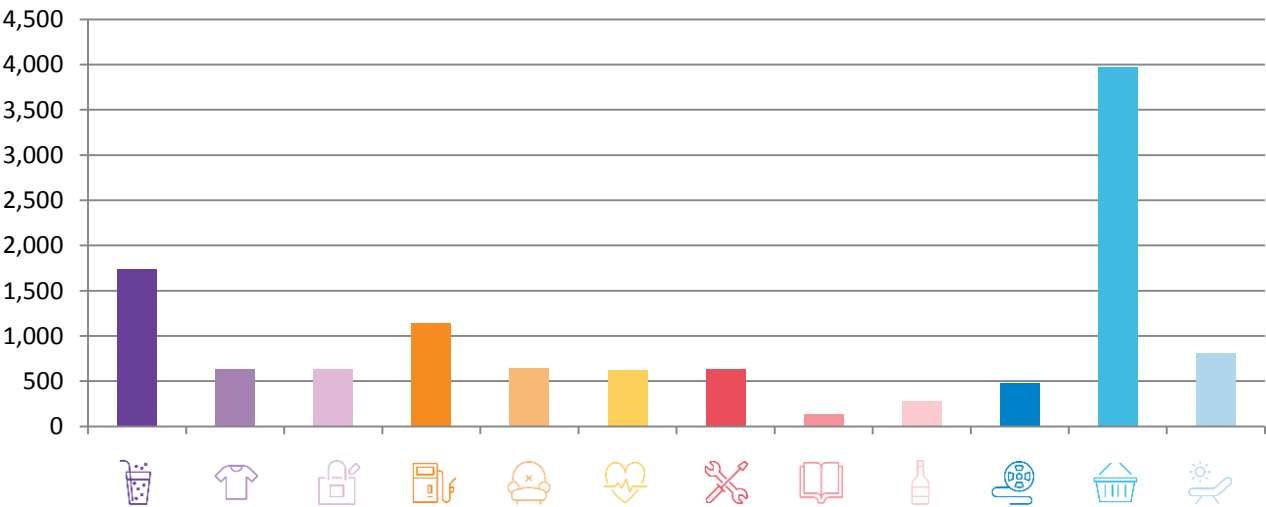
Compared to the same quarter of the previous year, spending increased in seven of the twelve categories, with Books & Stationery exhibiting the greatest decrease (-9.1%). Fuel & Service Stations (+4.1%) showed the greatest increase in year on year, followed by Travel & Accommodation (+4.0%).

Quarterly summary

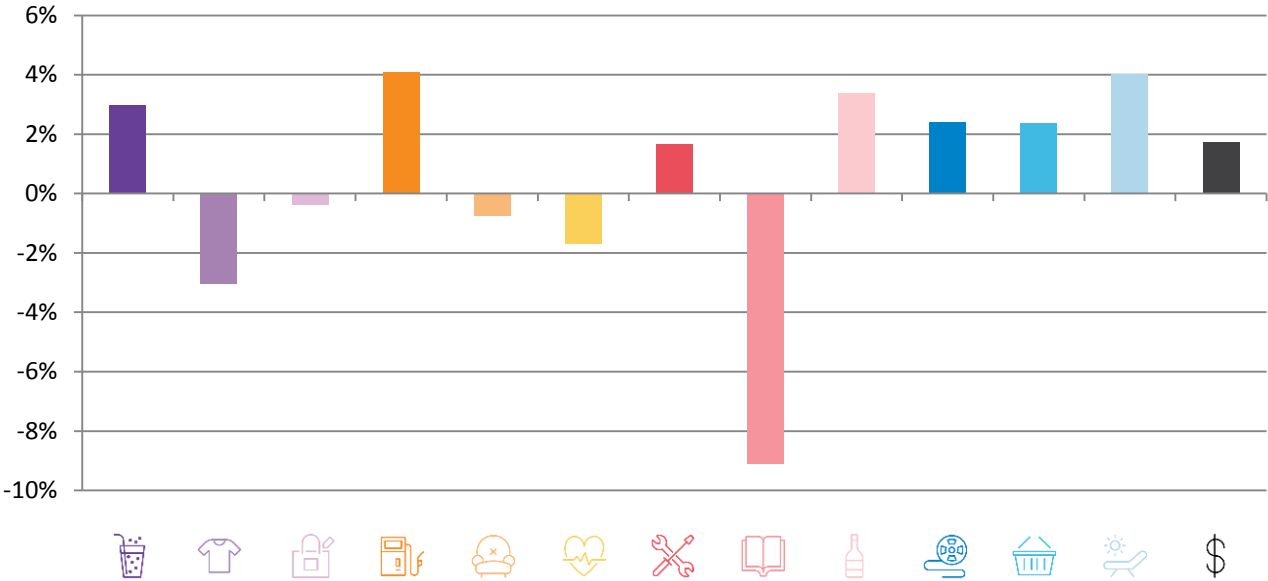
June 2017

Retailer Category	Quarter Total \$M	% Change vs Prior Quarter	% Change vs Last Year	% Share
 Cafés, Restaurants & Bars	1,740	2.5%	3.0%	14.8%
 Clothing & Footwear	637	11.6%	-3.0%	5.4%
 Department Stores	637	10.3%	-0.4%	5.4%
 Fuel & Service Stations	1,149	-4.7%	4.1%	9.8%
 Furniture, Appliances & Electronics	642	2.3%	-0.8%	5.5%
 Health Goods & Services	630	8.8%	-1.7%	5.4%
 Home & Building Supplies	641	-3.3%	1.7%	5.5%
 Books & Stationery Stores	136	-12.9%	-9.1%	1.2%
 Liquor Stores	283	-6.8%	3.4%	2.4%
 Recreation & Entertainment	478	3.5%	2.4%	4.1%
 Supermarkets & Food Retailers	3,966	-1.3%	2.4%	33.8%
 Travel & Accommodation	811	-10.9%	4.0%	6.9%
 TOTAL RETAIL SPEND	11,750	-0.2%	1.7%	100%

Quarterly spend by category (\$M)



Change vs last year



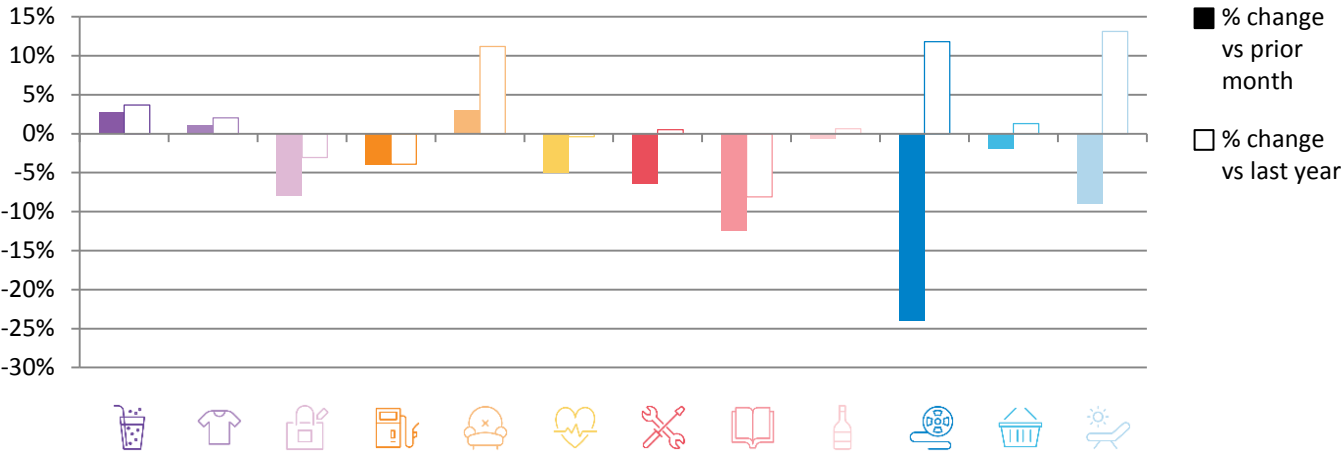
Selected regions of interest

June 2017

Monthly trends Otago

Retail spending in the Otago region increased in eight of the twelve categories compared to June last year. The greatest increase in year on year spend was seen in the Travel & Accommodation category (+13.1%) followed by Recreation & Entertainment (+11.8%). The greatest reduction in year on year spend was seen in the Books & Stationery category, with a decrease of 8.1%.

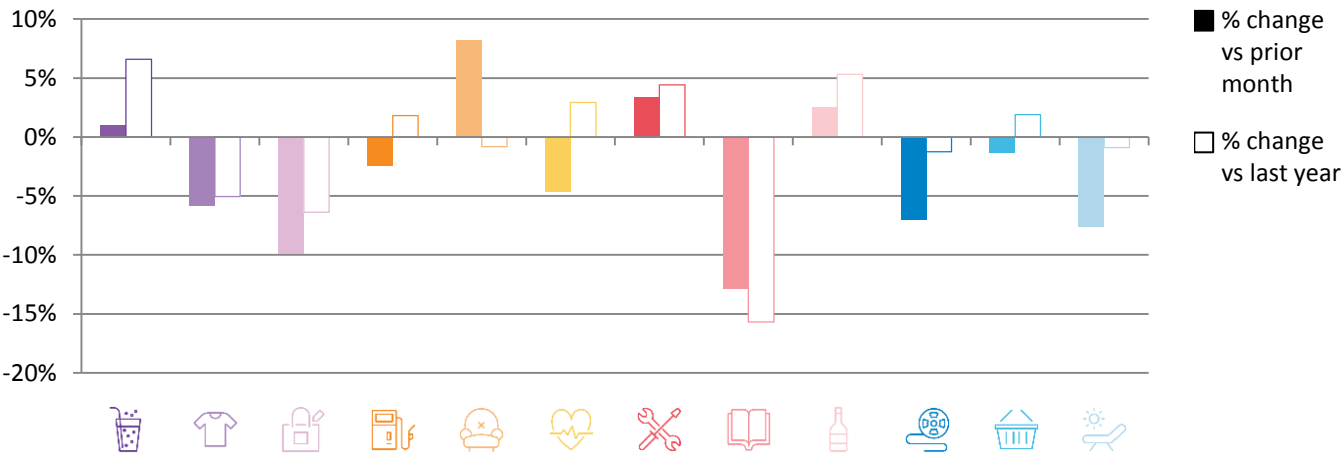
Compared to May, only three categories experienced increases in spend. Furniture, Appliances & Electronics (+3.0%) exhibited the largest increase, with Cafés, Restaurants, & Bars (+2.7%) following closely behind. The greatest decrease in monthly spend was seen in the Recreation & Entertainment (-24.0%).



Monthly trends Waikato

Spending in the Waikato region was up in six categories year on year. The greatest increases in spend were seen in Cafés, Restaurants, & Bars (+6.6%) and Liquor Stores (5.3%). The greatest decreases in spend as compared to June 2016 was in the Books & Stationery Stores category(-15.7%).

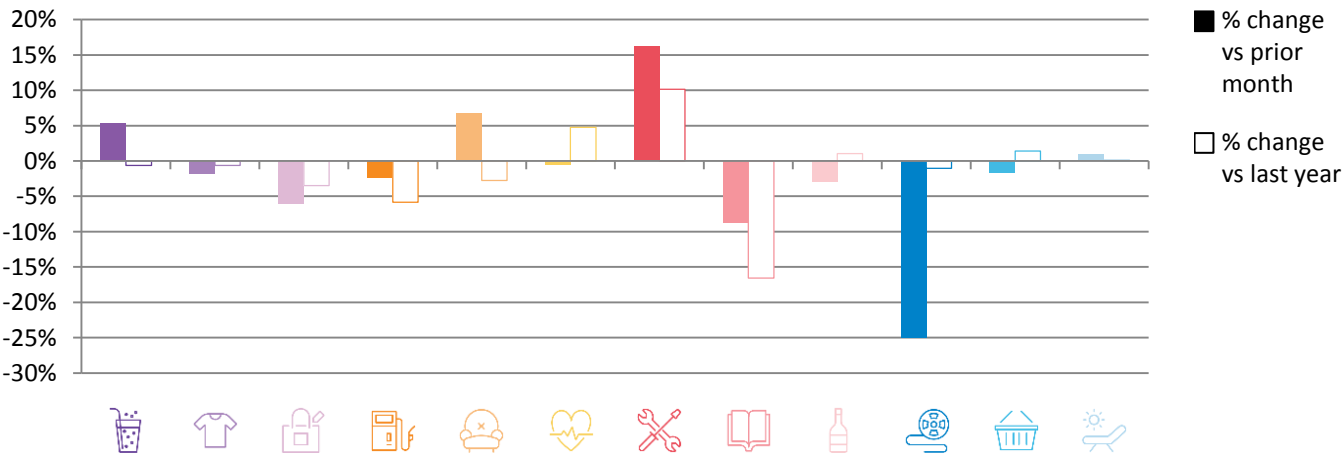
On the other hand, spending increased in just four of the twelve categories when compared to May. The biggest increases were seen in the Furniture, Appliances & Electronics (+8.2%), Home & Building Supplies(+3.3%), and Liquor Stores (+2.5%) categories. The Books & Stationery Stores category (-12.8%) saw the largest decrease in month on month spend.



Monthly trends Southland

Retail spend in the Southland region was up in five of the twelve categories compared to June 2016. The most substantial increase in spend was exhibited in the Home & Building Supplies category (+10.1%), while the greatest decrease in spend was seen in the Books & Stationery Stores category(-16.6%).

Month on month spend was down in all but four categories, with the Recreation & Entertainment category (-25.0%) seeing the greatest decline, followed by a 8.7% decrease in Books & Stationery. Home & Building Supplies exhibited the most significant increase in monthly spend at 16.2% followed by Furniture, Appliances & Electronics (+6.7%).



Going up this month

The only increase in spending this month was seen in the Furniture, Appliances & Electronics category, up 5.0%.

All sixteen regions experienced decreases in spend this month compared to May 2017.

1

Categories up

0

Regions up

Going down this month

The largest decrease in spending this month was seen in Recreation & Entertainment, down 13.2%.

The Hawke's Bay region experienced the greatest decrease in spend this month, down 5.1% from May 2017.

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 28/06/2017

Total online retail spend in New Zealand for the 28 days ending 28 June 2017 was \$348 million. This represents an increase of 9.3% year on year and a decrease of 10.2% against the previous month.

Online spending was up in seven of the ten categories year on year. Supermarkets & Food Retailers(+28.0%) saw the greatest increase in spending, while Home & Building Supplies (-13.6%) exhibited the greatest decrease.

Spending was largely decreased from the previous month, with nine of the ten categories experiencing decreases. The greatest decrease in spend was exhibited by the Home & Building Supplies category (-24.8%), with Health Goods & Services (+1.8%) exhibiting the only increase in spend.

Online Retailer Category		Month Total \$M	% Change vs Prior Month	% Change vs Last Year	% Share
	Clothing & Footwear	23.7	-4.3%	7.8%	6.8
	Department Stores	5.9	-15.9%	10.7%	1.7
	Furniture, Appliances & Electronics	22.1	-11.1%	21.2%	6.3
	Health Goods & Services	7.6	1.8%	4.5%	2.2
	Home & Building Supplies	2.7	-24.8%	-13.6%	0.8
	Books & Stationery Stores	7.6	-8.0%	-8.0%	2.2
	Liquor Stores	1.5	-24.5%	-4.9%	0.4
	Recreation & Entertainment	73.8	-20.8%	20.9%	21.2
	Supermarkets & Food Retailers	32.9	-2.7%	28.0%	9.4
	Travel & Accommodation	170.8	-6.8%	2.6%	49.0
	Total Online Retail Spend	348.5	-10.2%	9.3%	100.0

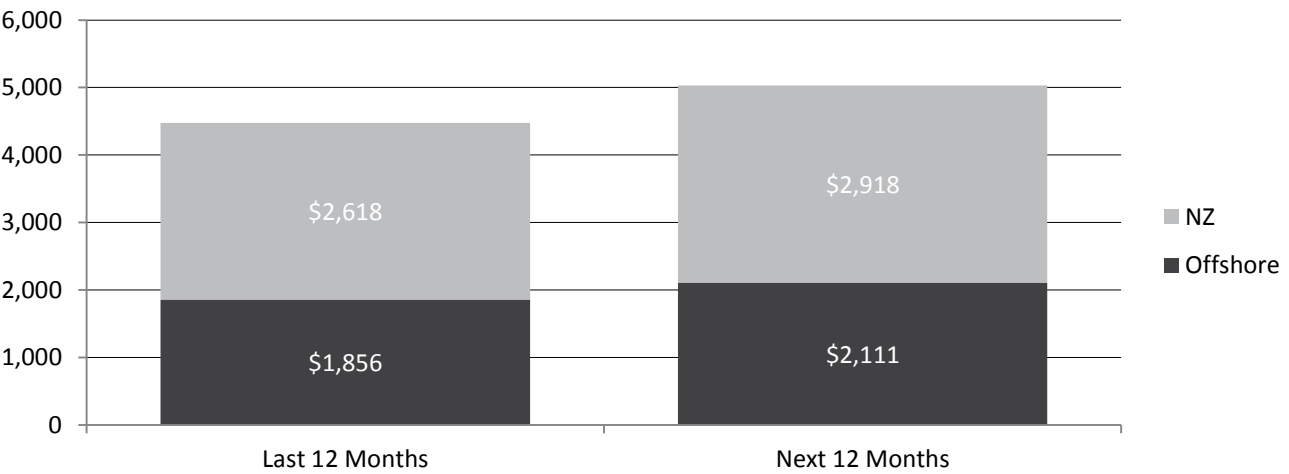
Online: New Zealand vs Offshore

New Zealand merchants accounted for 58.2% of online spend for the month of June. This was a decrease of 12.5% compared to the previous month and an increase of 14.7% compared to the prior year.

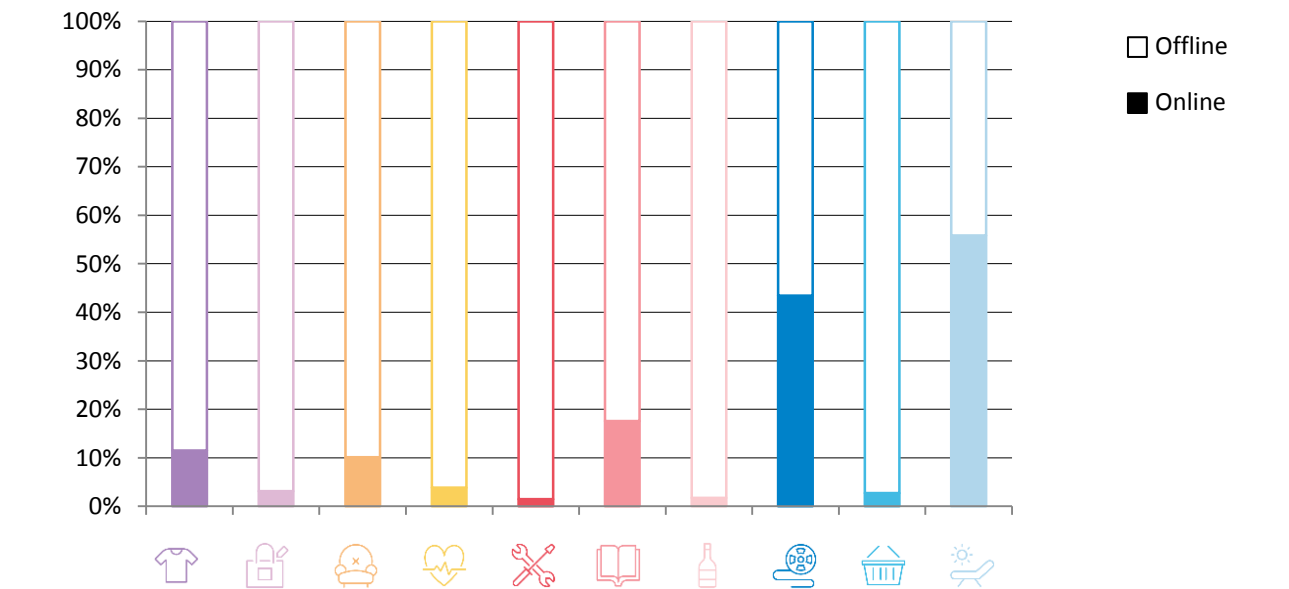
For New Zealand merchants, all but one category saw a decrease in spend compared to May (Health Goods & Services +25.3%). The greatest monthly decrease in spend was seen in Recreation & Entertainment (-33.8%), followed by a 20.7% decrease in Home & Building Supplies .

Spend at offshore retail decreased by 6.8% when compared to the previous month but increased by 2.5% when compared to the same period last year. Offshore merchants saw increases in spend in seven categories year on year, the largest in Recreation & Entertainment (+29.2%). In contrast, when compared to the previous month, nine categories declined with the greatest decrease in the Home & Building Supplies category (-42.5%).

Projected total online spend (\$M)














% share of category spend

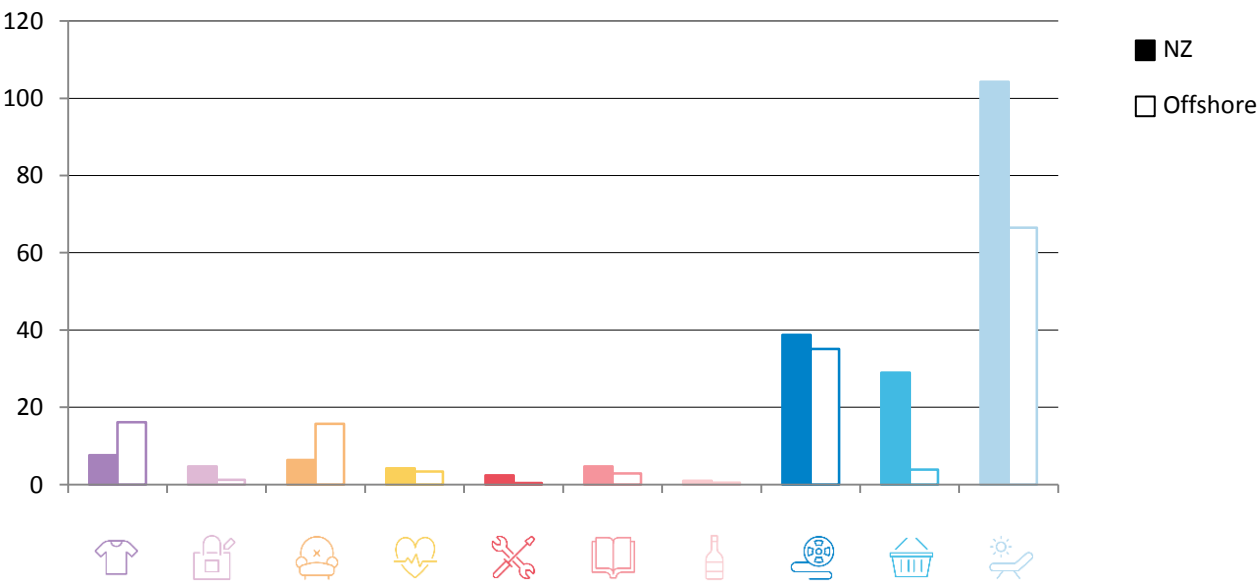


Online retail market summary New Zealand vs Offshore merchants

June 2017

Retailer Category	Month Total \$M		% Change vs Prior Month		% Change vs Last Year	
	NZ	Offshore	NZ	Offshore	NZ	Offshore
 Clothing & Footwear	7.6	16.1	-0.9%	-5.9%	16.8%	4.1%
 Department Stores	4.7	1.2	-17.9%	-7.2%	12.3%	4.6%
 Furniture, Appliances & Electronics	6.4	15.7	-12.8%	-10.4%	38.4%	15.4%
 Health Goods & Services	4.2	3.4	25.3%	-17.5%	4.6%	4.3%
 Home & Building Supplies	2.3	0.4	-20.7%	-42.5%	-3.3%	-47.5%
 Books & Stationery Stores	4.7	2.9	-10.0%	-4.6%	-14.2%	4.0%
 Liquor Stores	1.0	0.5	-19.8%	-32.5%	4.5%	-19.6%
 Recreation & Entertainment	38.7	35.1	-33.8%	1.1%	14.2%	29.2%
 Supermarkets & Food Retailers	29.0	3.9	-1.2%	-12.4%	30.8%	10.7%
 Travel & Accommodation	104.3	66.5	-5.8%	-8.5%	12.6%	-10.0%
 Total Retail Spend	202.8	145.7	-12.5%	-6.8%	14.7%	2.5%

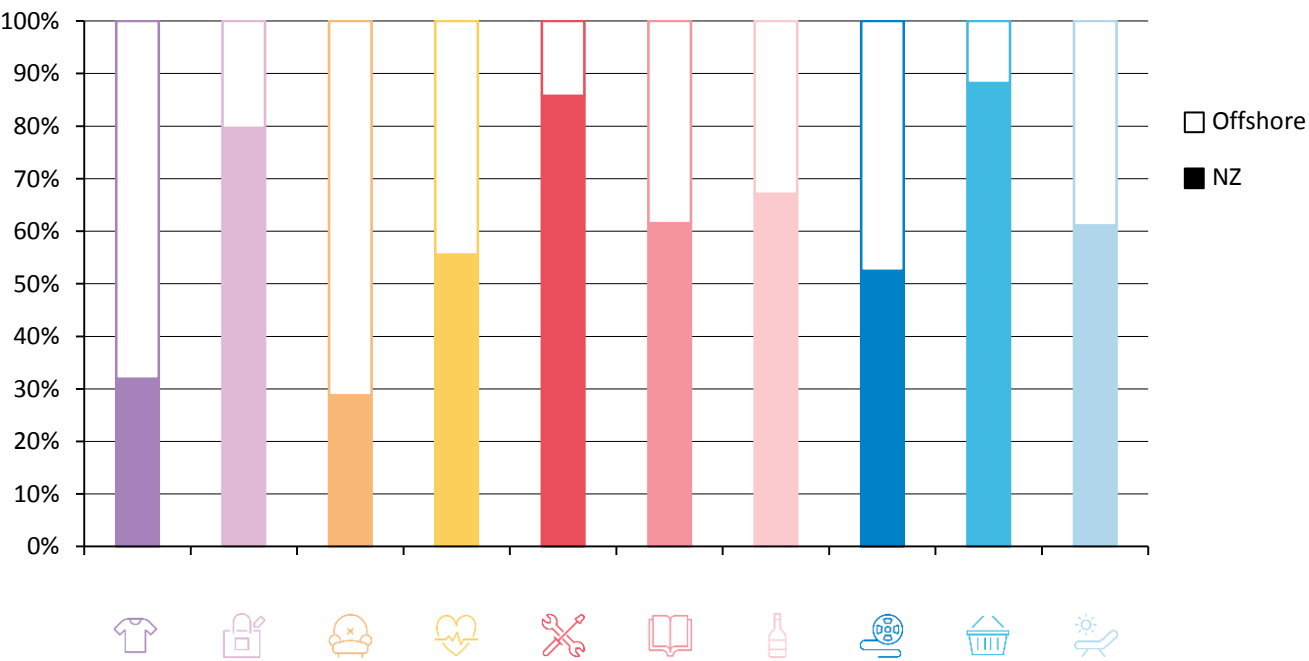
Online retailer total revenue by category (\$M)



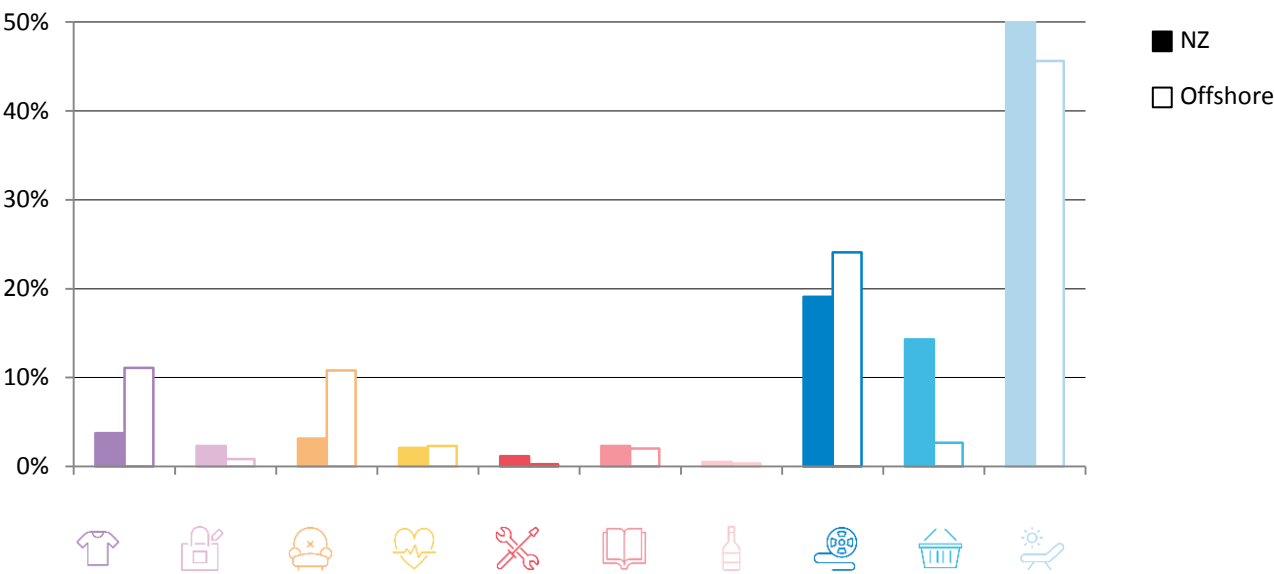
Monthly online revenue change YoY



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
 - Offshore: Jetstar Airways, Air BnB, Emirates, Netflix, Expedia, Virgin Australia, The Iconic, ASOS, StrawberryNet, Agoda, Boohoo, Cotton On



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