



Retailwatch














Value of electronic card transactions within retail categories

Period ending 31/07/2017

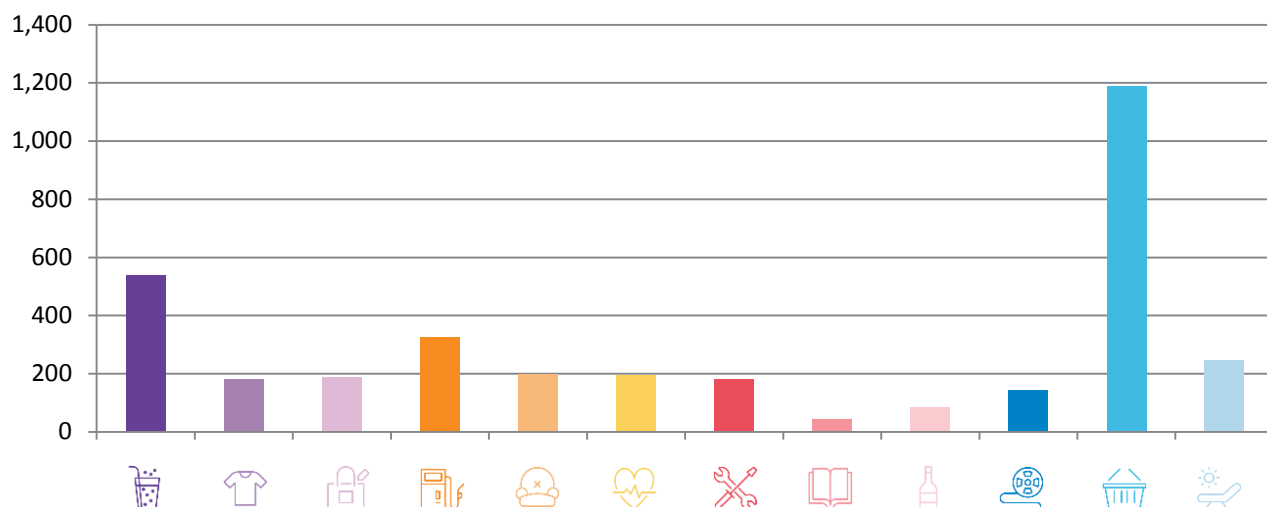
Total retail spend in New Zealand for the 28 days ending 28 July 2017 was \$3.5 billion. This was a decrease of 1.3% compared to June and a decrease of 0.4% when compared to the same period last year.

Spending was up in six categories year on year, with the Books & Stationery Stores category exhibiting the greatest decrease of 10.4%.

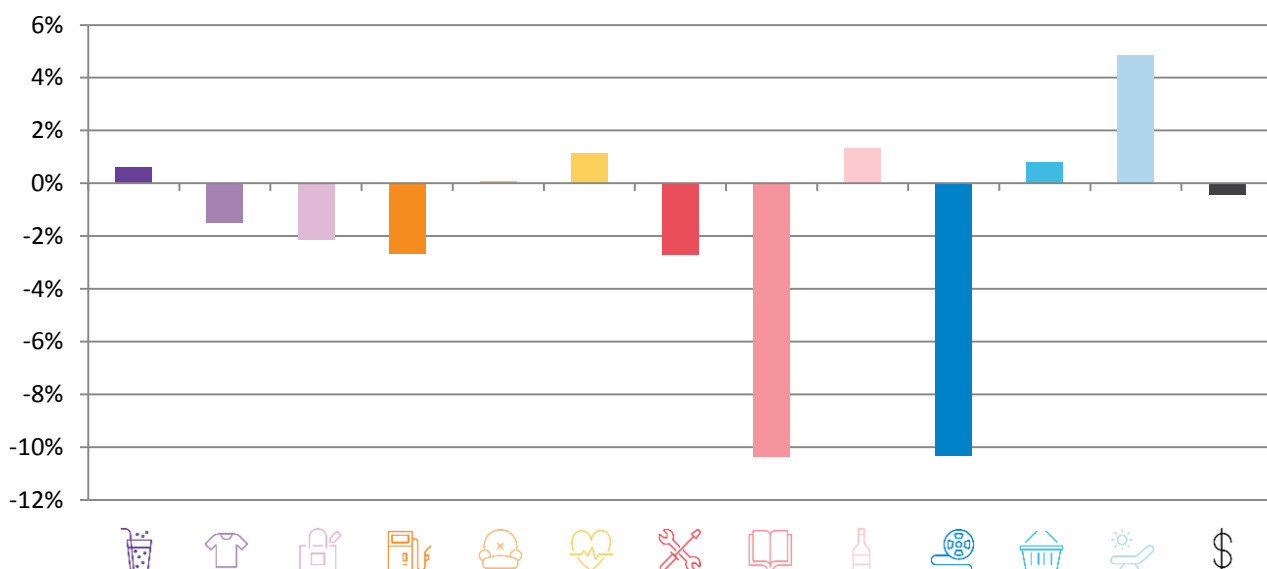
Compared to June, eight of the twelve categories experienced decreases in spend. The largest decrease was seen in Clothing & Footwear (-6.0%), followed by Home & Building Supplies (-4.8%), and Fuel & Service Stations (-4.7%). Despite the greatest year on year decrease, the Books & Stationery Stores category saw the greatest month on month increase (+8.0%).

Retailer Category	Month Total \$M	% Change vs Prior Month	% Change vs Last Year	% Share
 Cafés, Restaurants & Bars	537	0.6%	0.6%	15.3%
 Clothing & Footwear	181	-6.0%	-1.5%	5.2%
 Department Stores	186	-2.2%	-2.2%	5.3%
 Fuel & Service Stations	326	-4.7%	-2.7%	9.3%
 Furniture, Appliances & Electronics	198	-3.2%	0.1%	5.7%
 Health Goods & Services	195	-0.8%	1.1%	5.6%
 Home & Building Supplies	179	-4.8%	-2.7%	5.1%
 Books & Stationery Stores	44	8.0%	-10.4%	1.2%
 Liquor Stores	83	-2.1%	1.3%	2.4%
 Recreation & Entertainment	144	5.5%	-10.3%	4.1%
 Supermarkets & Food Retailers	1,189	-0.9%	0.8%	33.9%
 Travel & Accommodation	244	0.4%	4.9%	7.0%
 TOTAL RETAIL SPEND	3,504	-1.3%	-0.4%	100%

Monthly retail spend by category (\$M)



Change vs last year



Quarterly summary

July 2017













The total quarterly retail spend for the 91 days ending 28 July 2017 was \$11.6 billion. This was a decrease of 2.3% when compared to the previous quarter, and an increase of 1.1% 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 Travel & Accommodation category (-8.5%), followed by Fuel & Service Stations (-8.4%). Department Stores (+5.8%) and Clothing & Footwear(+5.3%) saw the largest increases in spend.

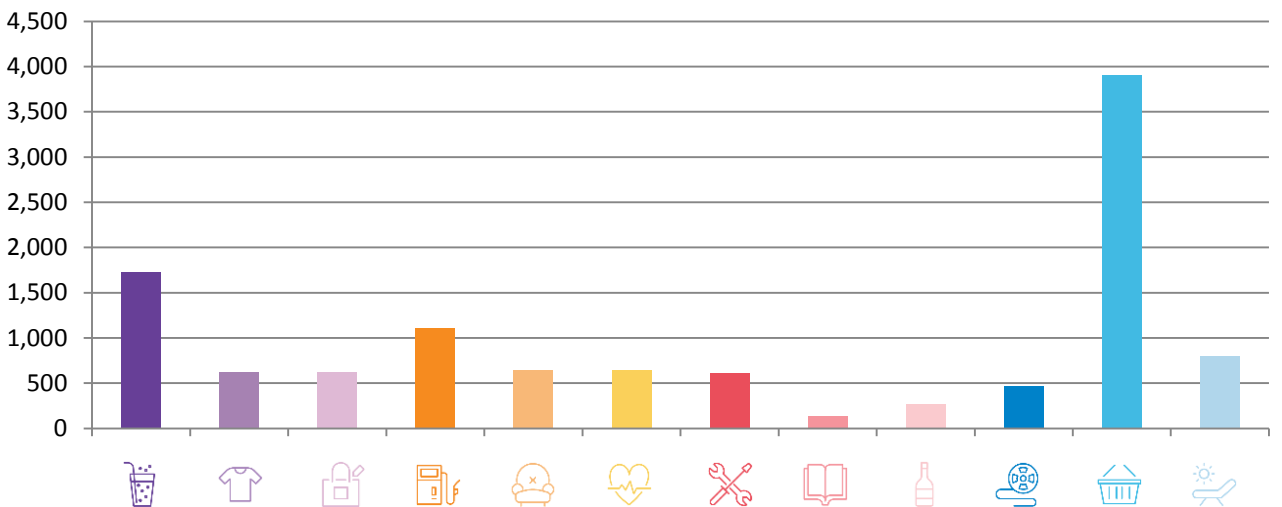
Compared to the same quarter of the previous year, spending increased in seven of the twelve categories, with Books & Stationery exhibiting the greatest decrease (-9.0%). Travel & Accommodation (+4.6%) showed the greatest increase in year on year, followed by Cafés, Restaurants & Bars (+2.5%).

Quarterly summary

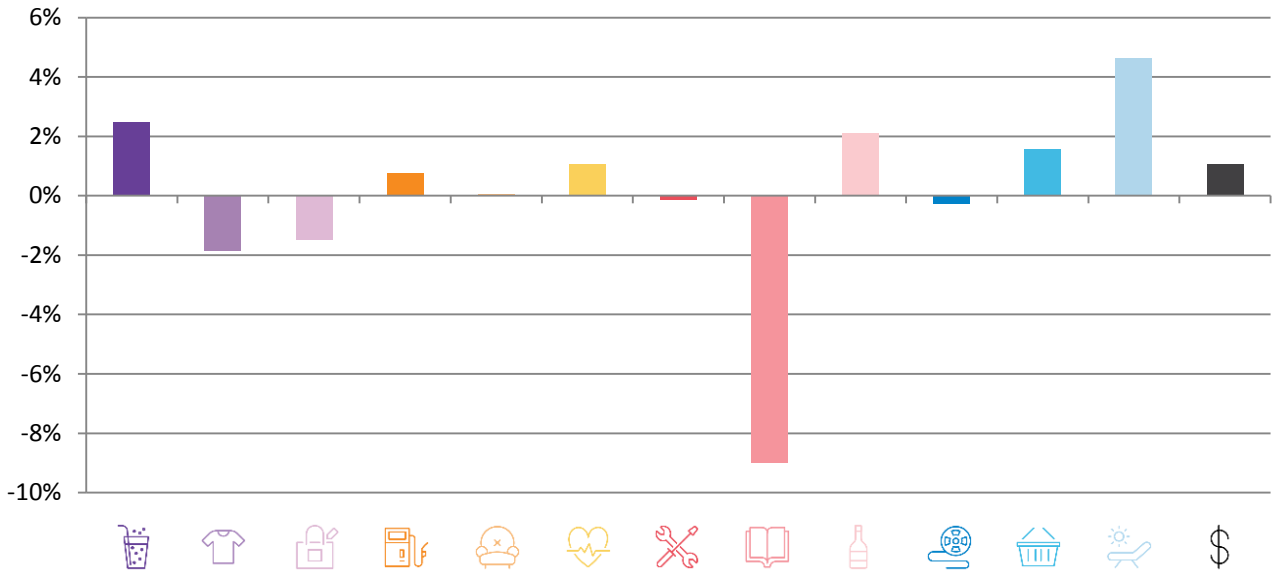
July 2017

Retailer Category	Quarter Total \$M	% Change vs Prior Quarter	% Change vs Last Year	% Share
 Cafés, Restaurants & Bars	1,734	0.1%	2.5%	15.0%
 Clothing & Footwear	621	5.3%	-1.9%	5.4%
 Department Stores	624	5.8%	-1.5%	5.4%
 Fuel & Service Stations	1,107	-8.4%	0.7%	9.5%
 Furniture, Appliances & Electronics	647	2.0%	0.0%	5.6%
 Health Goods & Services	644	4.2%	1.1%	5.6%
 Home & Building Supplies	614	-7.3%	-0.1%	5.3%
 Books & Stationery Stores	139	-4.4%	-9.0%	1.2%
 Liquor Stores	275	-8.1%	2.1%	2.4%
 Recreation & Entertainment	470	1.3%	-0.3%	4.1%
 Supermarkets & Food Retailers	3,913	-3.2%	1.6%	33.8%
 Travel & Accommodation	803	-8.5%	4.6%	6.9%
\$ TOTAL RETAIL SPEND	11,592	-2.3%	1.1%	100%

Quarterly spend by category (\$M)



Change vs last year



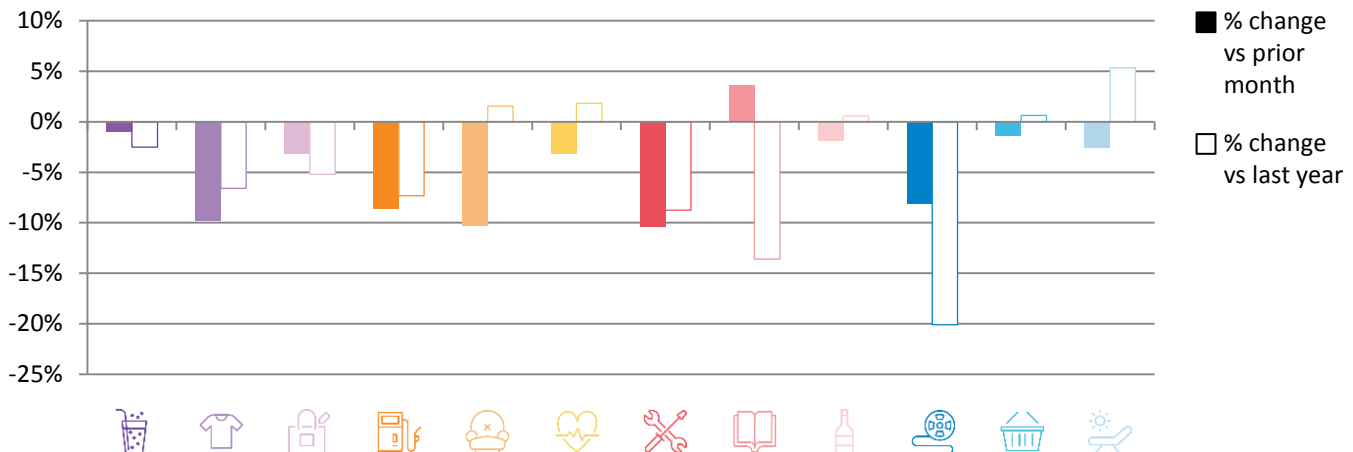
Selected regions of interest

July 2017

Monthly trends Southland

Retail spending in the Southland region increased in five of the twelve categories compared to July last year. The greatest increase in year on year spend was seen in the Travel & Accommodation category (+5.3%) followed by Health Goods & Services (+1.8%). The greatest reduction in year on year spend was seen in the Recreation & Entertainment category, with a decrease of 20.1%.

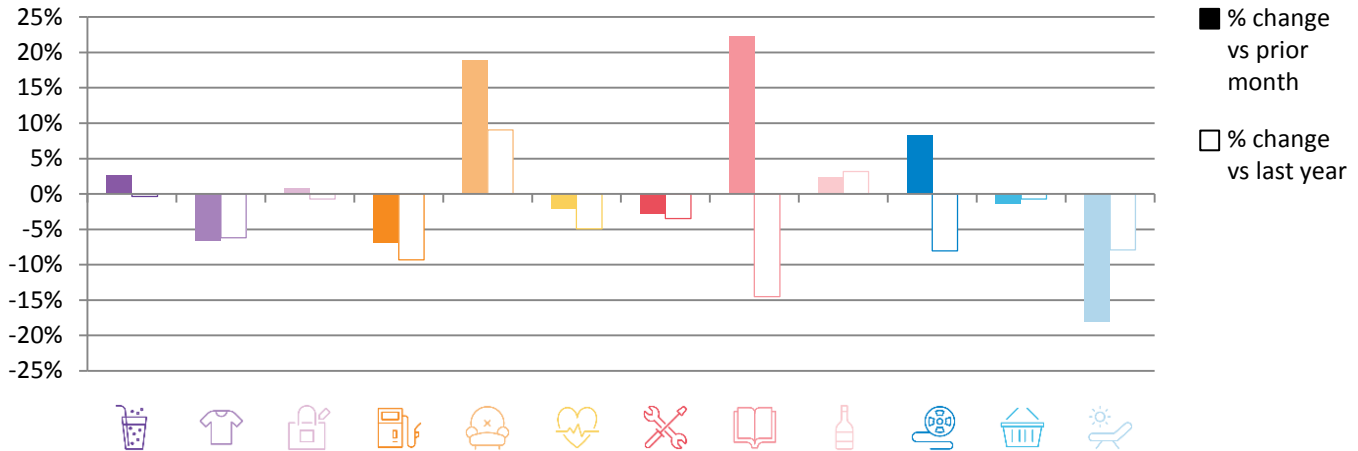
Compared to June, only one category experienced an increase in spend. This category was Books & Stationery Stores, increasing 3.6%. Home & Building Supplies (-10.4%) exhibited the largest decrease in monthly spend, followed closely by Furniture, Appliances & Electronics (-10.3%) and Clothing & Footwear (-9.8%).



Monthly trends Tasman

Spending in the Tasman region was up in two categories year on year. These increases in spend were seen in Furniture, Appliances & Electronics (+9.1%) and Liquor Stores (+3.2%). The greatest decrease in spend as compared to July 2016 was in the Books & Stationery Stores category (-14.5%).

On the other hand, spending increased in six of the twelve categories when compared to June. The biggest increases were seen in the Books & Stationery Stores (+22.3%), Furniture, Appliances & Electronics (+18.9%), and Recreation & Entertainment (+8.2%) categories. The Travel & Accommodation category (-18.1%) saw the largest decrease in month on month spend.



Monthly trends Gisborne

Retail spend in the Gisborne region was up in eight of the twelve categories compared to July 2016. The most substantial increase in spend was exhibited in the Home & Building Supplies category (+17.9%), while the greatest decrease in spend was seen in the Recreation & Entertainment category (-12.3%).

Month on month spend was down in all but four categories, with the Clothing & Footwear category (-9.9%) seeing the greatest decline, followed by a 7.1% decrease in Department Stores. Books & Stationery Stores exhibited the most significant increase in monthly spend at 18.1% followed by Home & Building Supplies (+6.2%).



Going up this month

The greatest increase in spending this month was seen in the Books & Stationery Stores category, up 8.0%.

The Northland region experienced the only increase in spend this month compared to June 2017.

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Categories up

1

Regions up

Going down this month

The largest decrease in spending this month was seen in Clothing & Footwear, down 6.0%.

The Marlborough region experienced the greatest decrease in spend this month, down 4.1% from June 2017.

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Categories down

15

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 28/07/2017

Total online retail spend in New Zealand for the 28 days ending 28 July 2017 was \$354million. This represents an increase of 7.3% year on year and a decrease of 4.8% against the previous month.

Online spending was up in six of the ten categories year on year. Supermarkets & Food Retailers(+31.0%) saw the greatest increase in spending, while Home & Building Supplies (-17.5%) 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 Liquor Stores category (-16.5%), with Department Stores (+2.4%) exhibiting the only increase in spend.

Online Retailer Category	Month Total \$M	% Change vs Prior Month	% Change vs Last Year	% Share
 Clothing & Footwear	24.01	-7.1%	12.9%	6.8%
 Department Stores	6.46	2.4%	16.8%	1.8%
 Furniture, Appliances & Electronics	23.45	-3.6%	13.9%	6.6%
 Health Goods & Services	7.14	-13.2%	-2.2%	2.02%
 Home & Building Supplies	2.90	-2.6%	-17.5%	0.82%
 Books & Stationery Stores	7.64	-2.7%	-4.1%	2.16%
 Liquor Stores	1.61	-16.5%	-14.6%	0.45%
 Recreation & Entertainment	70.48	-10.5%	8.4%	19.9%
 Supermarkets & Food Retailers	33.17	-2.1%	31.0%	9.4%
 Travel & Accommodation	177.10	-2.5%	3.3%	50.0%
 Total Online Retail Spend	353.96	-4.8%	7.3%	100.0

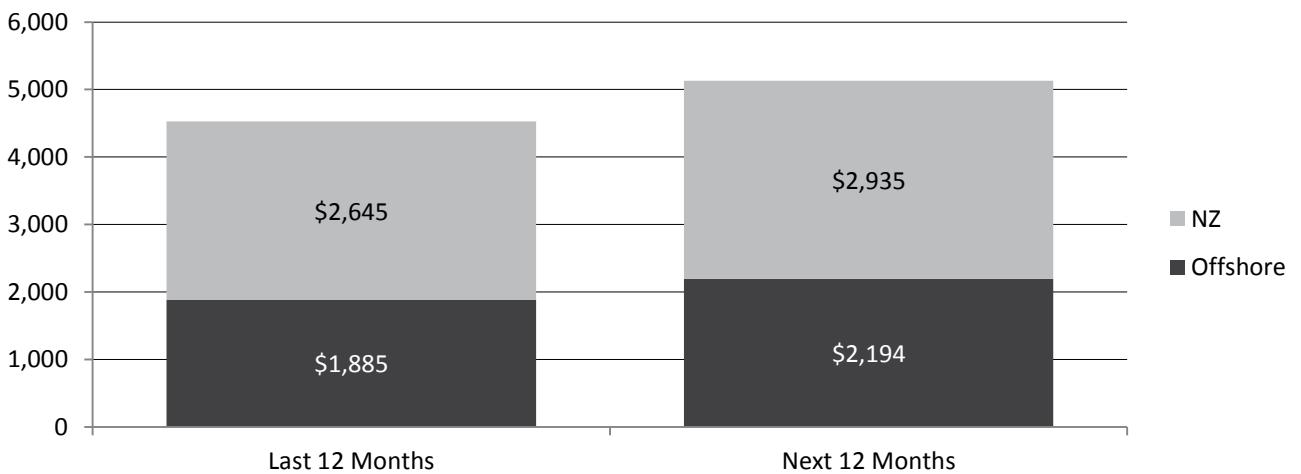
Online: New Zealand vs Offshore

New Zealand merchants accounted for 56.5% of online spend for the month of July. This was a decrease of 4.0% compared to the previous month and an increase of 8.4% compared to the previous year.

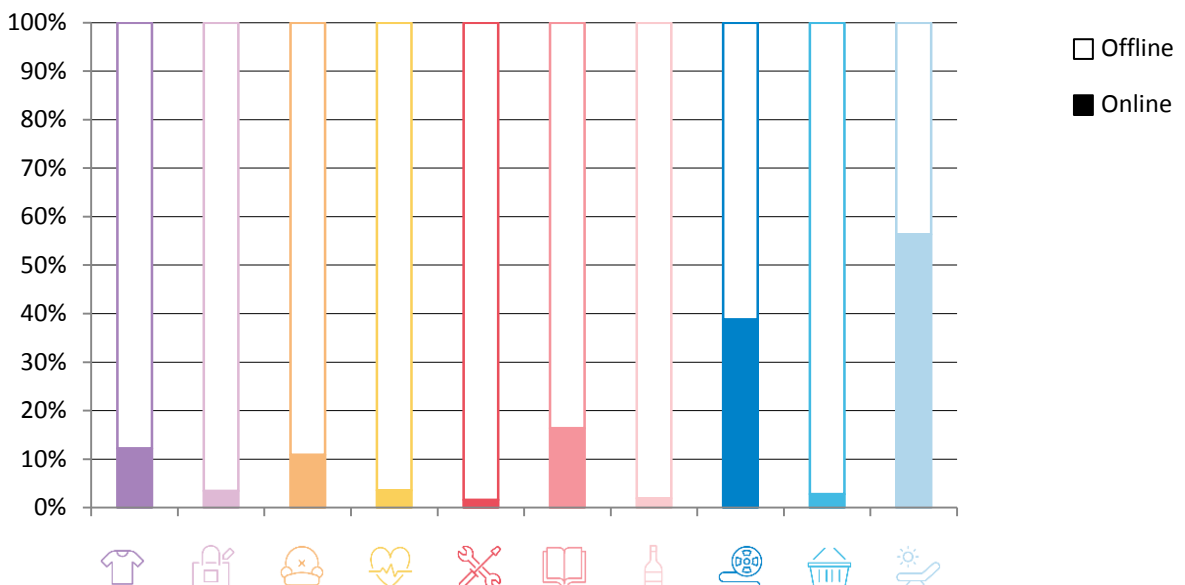
For New Zealand merchants, four categories saw increases in spend compared to June. Furniture, Appliances & Electronics saw the greatest increase (+6.6%), followed closely by Home & Building Supplies (5.7%). The greatest monthly decrease in spend was seen in the Recreation & Entertainment category (-18.5%).

Spend at offshore retail decreased by 5.7% when compared to the previous month but increased by 5.9% when compared to the same period last year. Offshore merchants saw increases in spend in five categories year on year, the largest in Recreation & Entertainment (+36.5%). In contrast, when compared to the previous month, eight categories declined with the greatest decrease in the Liquor Stores category (-35.6%).

Projected total online spend (\$M)














% share of category spend (offline vs online)

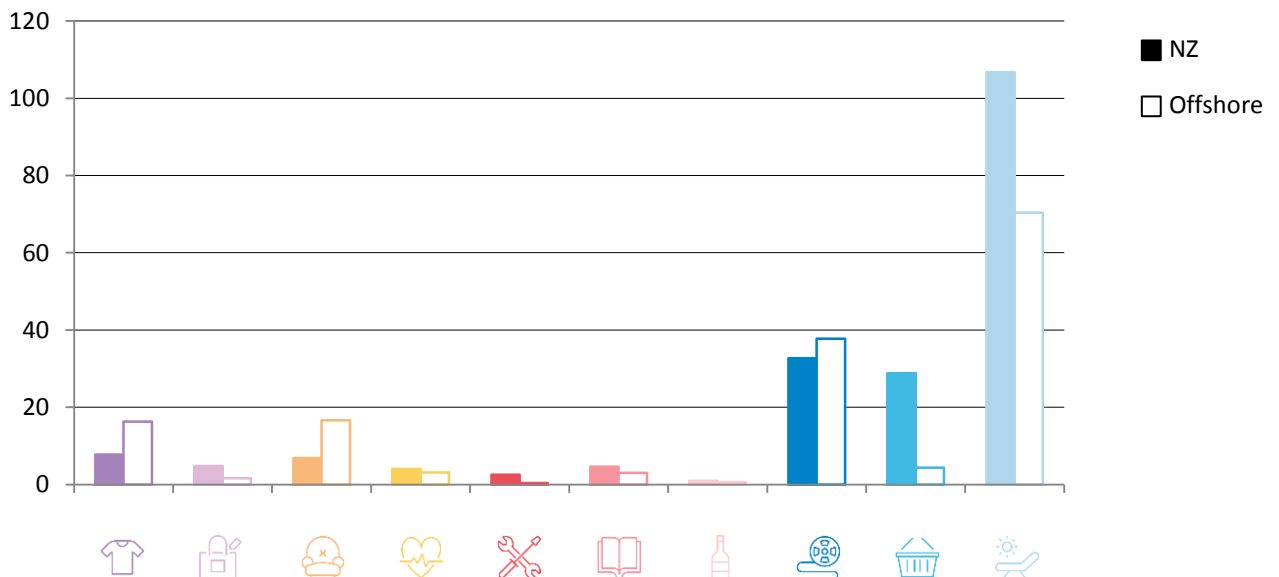


Online retail market summary New Zealand vs Offshore merchants

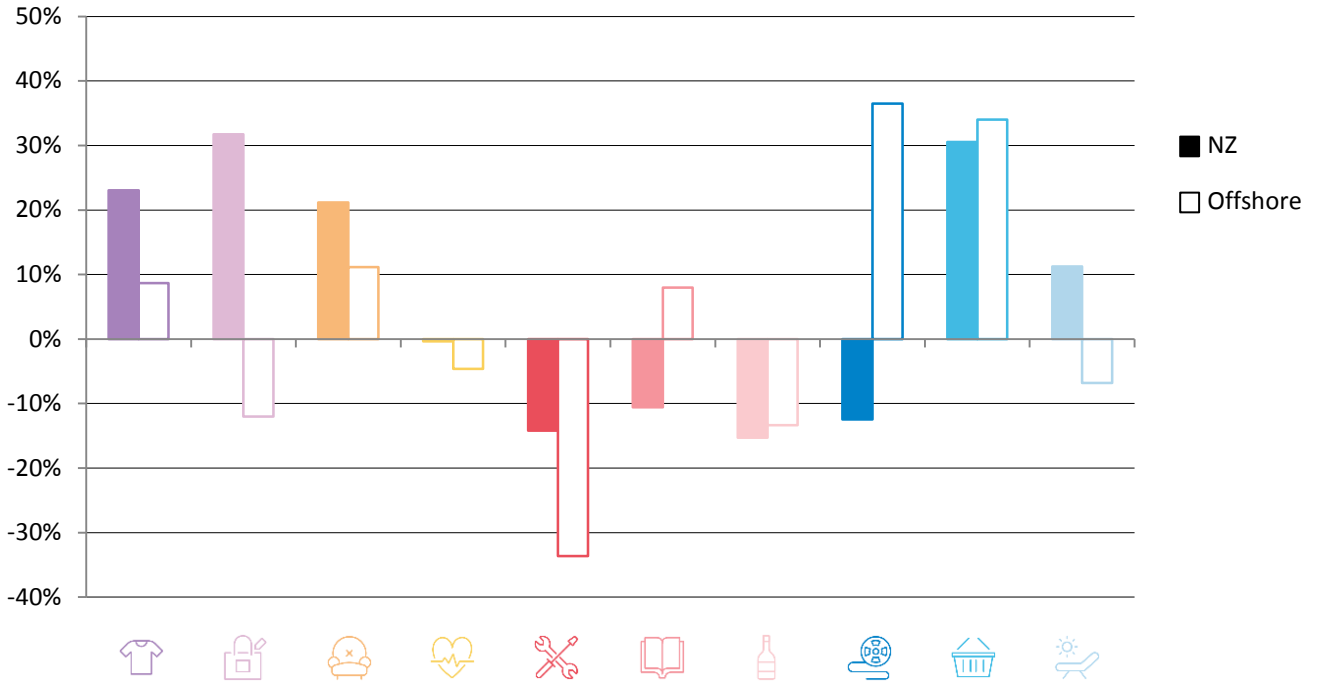
July 2017

Retailer Category	Month Total \$M		% Change vs Prior Month		% Change vs Last Year	
	NZ	Offshore	NZ	Offshore	NZ	Offshore
 Clothing & Footwear	7.7	16.3	-4.4%	-8.4%	23.0%	8.7%
 Department Stores	4.8	1.7	0.4%	8.8%	31.7%	-12.0%
 Furniture, Appliances & Electronics	6.9	16.6	6.6%	-7.3%	21.1%	11.1%
 Health Goods & Services	4.0	3.1	-4.6%	-22.4%	-0.3%	-4.6%
 Home & Building Supplies	2.5	0.4	5.7%	-35.2%	-14.2%	-33.6%
 Books & Stationery Stores	4.6	3.0	-2.7%	-2.7%	-10.6%	8.0%
 Liquor Stores	1.0	0.6	1.5%	-35.6%	-15.3%	-13.3%
 Recreation & Entertainment	32.7	37.8	-18.5%	-2.1%	-12.5%	36.5%
 Supermarkets & Food Retailers	28.8	4.3	-2.5%	1.2%	30.5%	34.0%
 Travel & Accommodation	106.7	70.4	-0.1%	-5.9%	11.2%	-6.8%
 Total Retail Spend	199.8	154.1	-4.0%	-5.7%	8.4%	5.9%

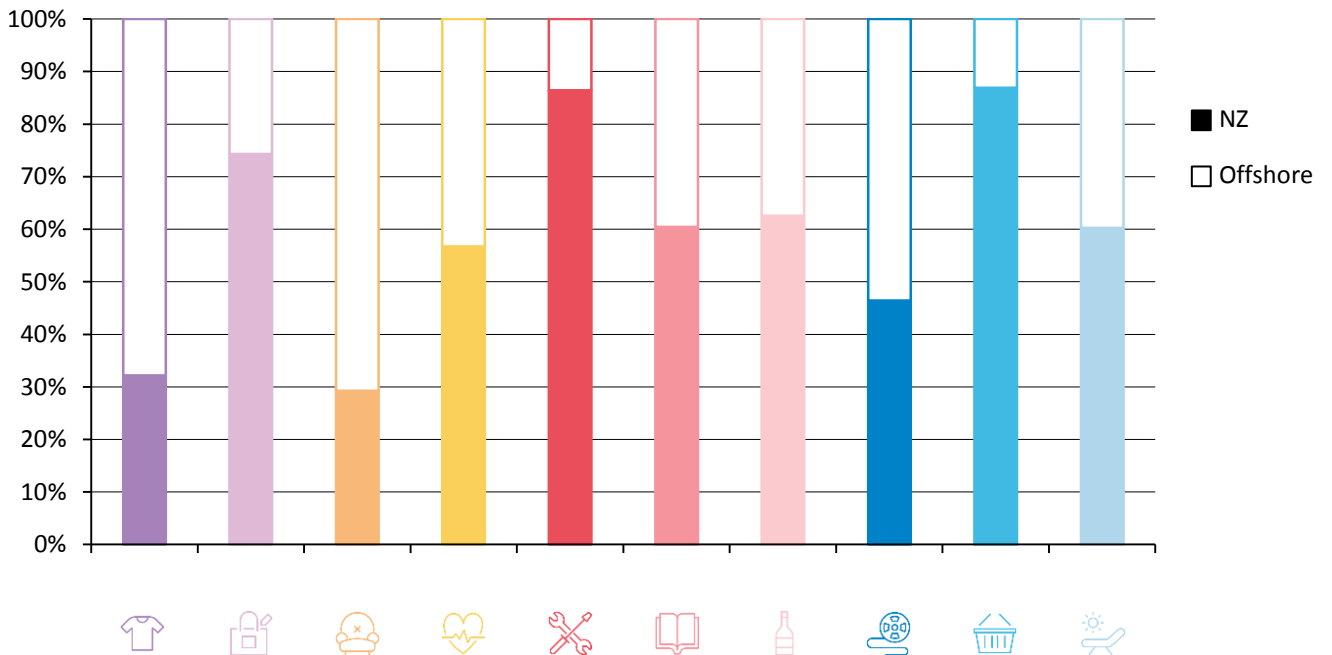
Online retailer total revenue by category (\$M)



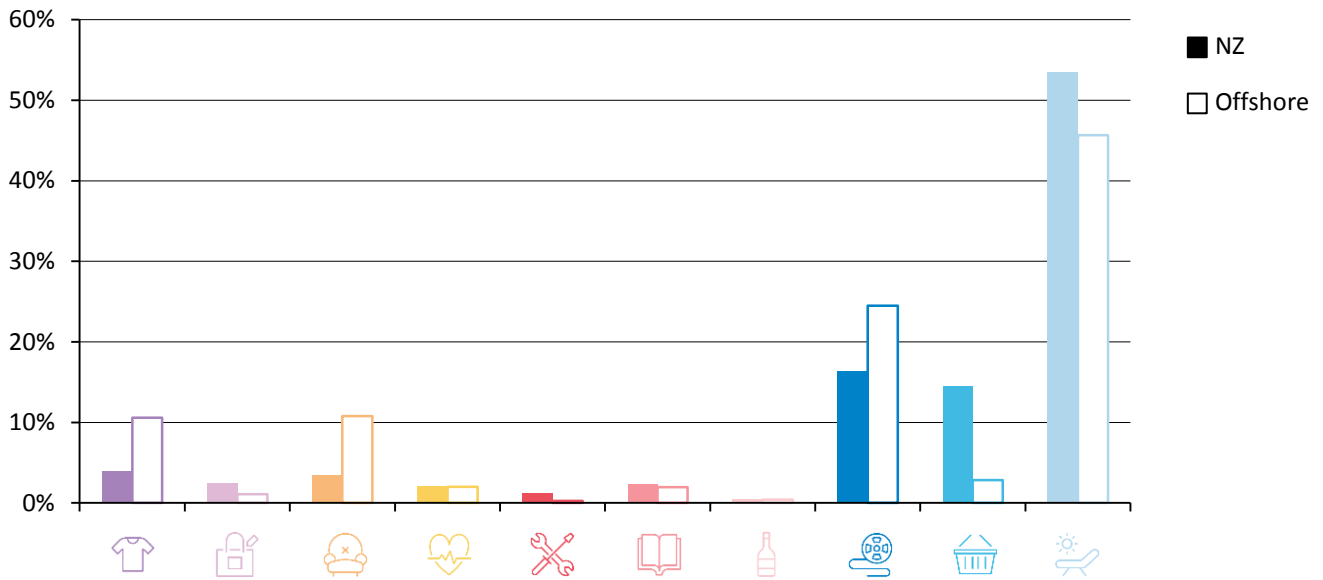
Monthly online revenue change YoY



Share of online category spend



Share of total NZ/Offshore online spend by category



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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