



# Retailwatch














## Value of electronic card transactions within retail categories

Period ending 28/09/2017

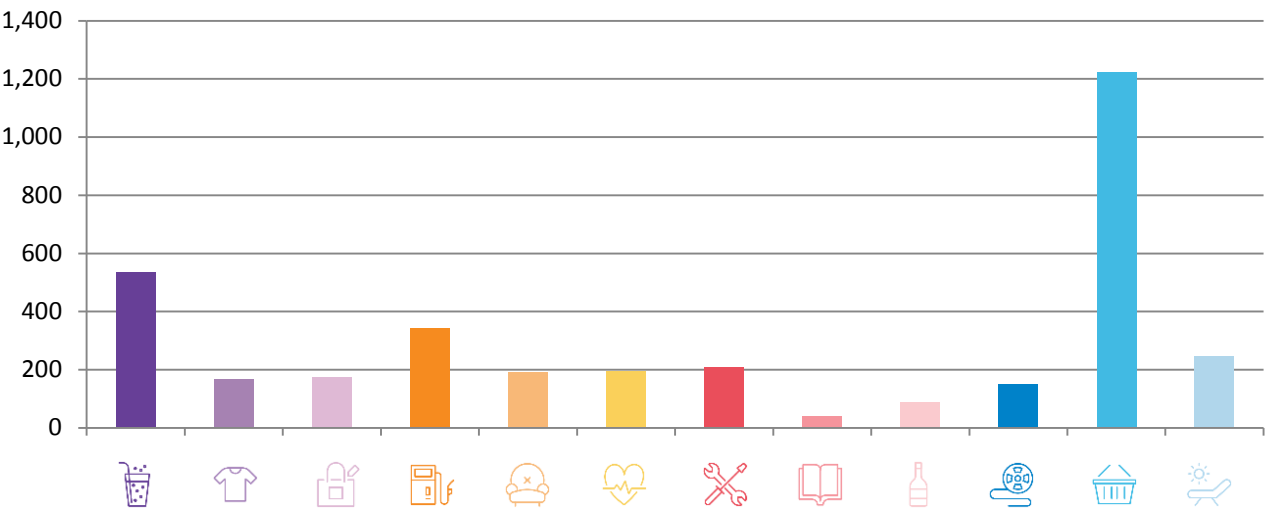
Total retail spend in New Zealand for the 28 days ending 28 September 2017 was \$3.56 billion. This was an increase of 2.4% compared to August and an increase of 1.1% when compared to the same period last year.

Spending was up in six categories year on year, with Liquor Stores (+4.5%) showing the greatest increase followed by Fuel & Service Stations (+3.9%). The Books & Stationery Stores category exhibited the greatest decrease again year on year, declining 7.9%. This was followed by the Department Stores and Clothing & Footwear categories, down 4.4% and 3.6% respectively.

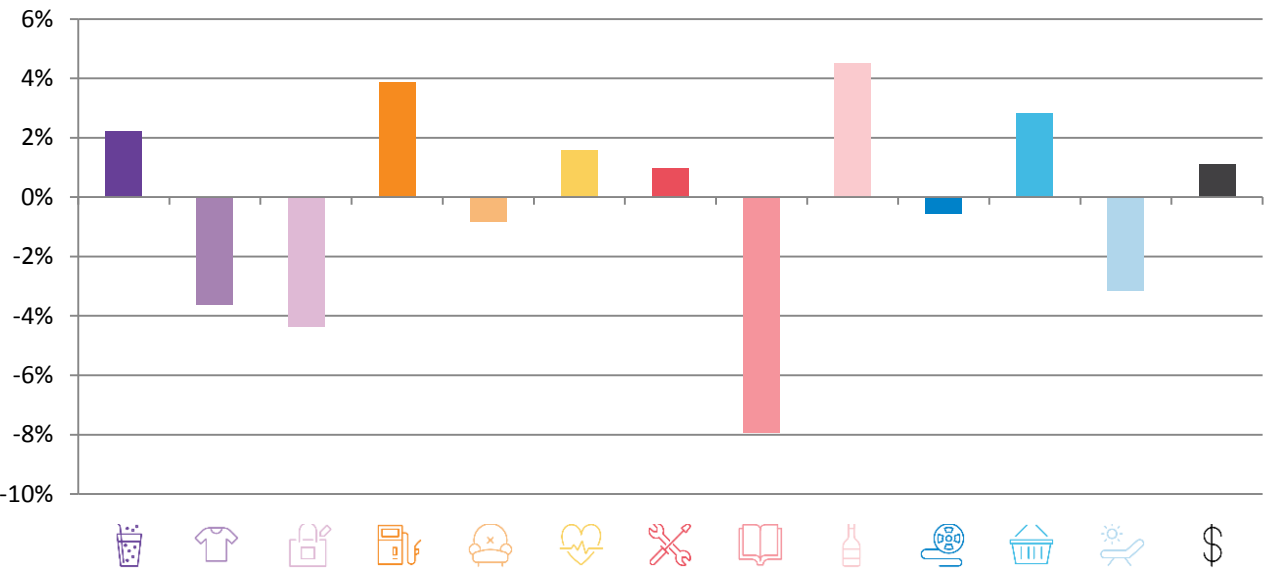
Month on month, ten of the twelve categories experienced increases in spend. The largest increase was seen in Home & Building Supplies (+12.0%). The greatest month on month decrease was seen in the Health Goods & Services category, down 1.5%.

Retailer Category	Month Total \$M	% Change vs Prior Month	% Change vs Last Year	% Share
 Cafés, Restaurants & Bars	535	0.4%	2.2%	15.0%
 Clothing & Footwear	168	4.1%	-3.6%	4.7%
 Department Stores	173	5.8%	-4.4%	4.9%
 Fuel & Service Stations	343	0.8%	3.9%	9.6%
 Furniture, Appliances & Electronics	193	1.9%	-0.8%	5.4%
 Health Goods & Services	195	-1.5%	1.6%	5.5%
 Home & Building Supplies	207	12.0%	0.9%	5.8%
 Books & Stationery Stores	41	-0.9%	-7.9%	1.1%
 Liquor Stores	87	2.4%	4.5%	2.4%
 Recreation & Entertainment	148	8.6%	-0.6%	4.2%
 Supermarkets & Food Retailers	1,224	1.2%	2.8%	34.4%
 Travel & Accommodation	247	4.7%	-3.2%	6.9%
 <b>TOTAL RETAIL SPEND</b>	<b>3,560</b>	<b>2.4%</b>	<b>1.1%</b>	<b>100%</b>

## Monthly retail spend by category (\$M)



## Change vs last year



## Quarterly summary

### September 2017














The total quarterly retail spend for the 91 days ending 28 September 2017 was \$11.45 billion. This was a decrease of 2.7% when compared to the previous quarter and an increase of 0.9% when compared to the same period last year.

Eleven of the twelve categories experienced a decrease in spend when compared to the previous quarter. The largest decrease in spending was in the Clothing & Footwear category (-13.8%), followed by Department Stores (-11.2%) and Fuel & Service Stations (-4.8%). The only increases in spend was seen in the Health Goods & Services, up 0.9%.

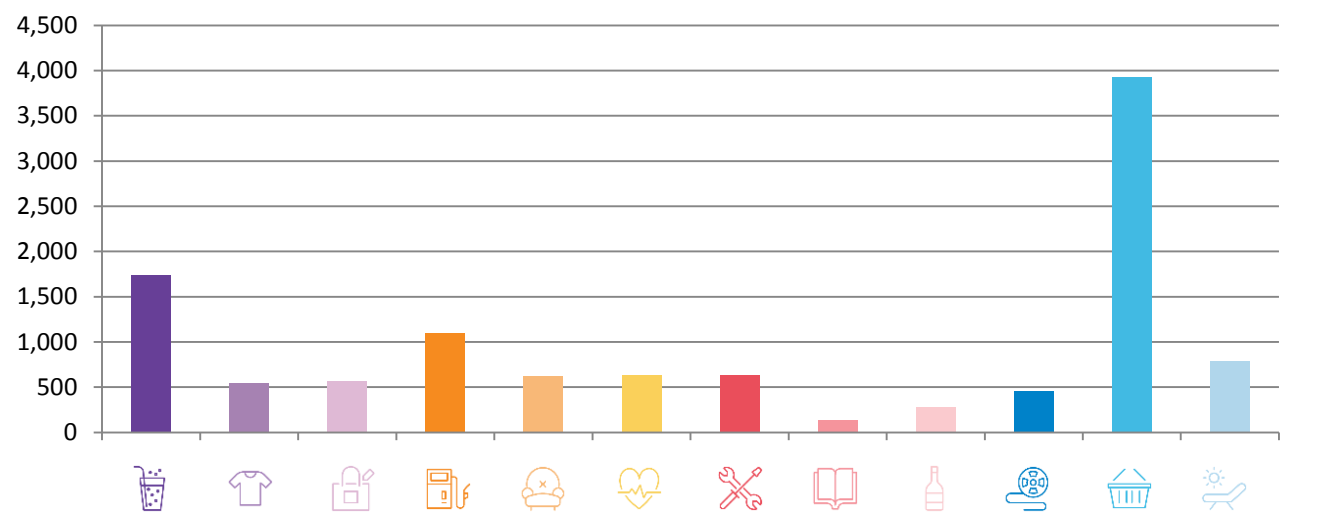
Compared to the same quarter of the previous year, spending increased in six of the twelve categories, with Liquor Stores showing the greatest increase, up 3.5%. Books & Stationery Stores (-8.6%) showed the greatest decrease year on year, followed by Recreation & Entertainment (-4.0%).

# Quarterly summary

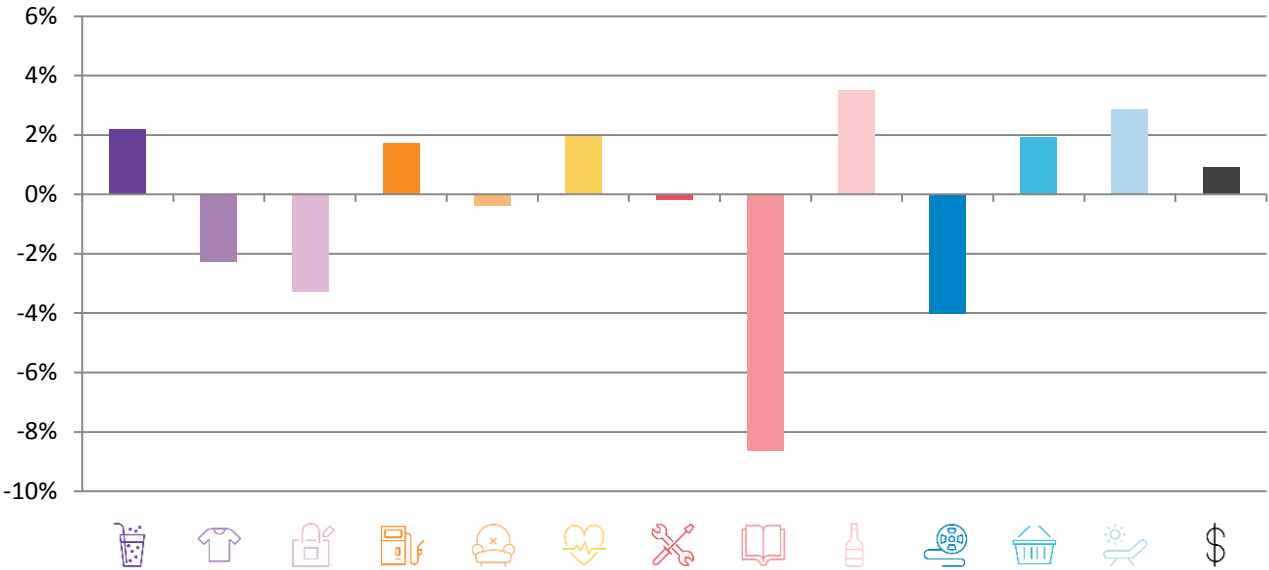
September 2017

Retailer Category	Quarter Total \$M	% Change vs Prior Quarter	% Change vs Last Year	% Share
 Cafés, Restaurants & Bars	1,739	-0.1%	2.2%	15.2%
 Clothing & Footwear	553	-13.8%	-2.3%	4.8%
 Department Stores	568	-11.2%	-3.3%	5.0%
 Fuel & Service Stations	1,095	-4.8%	1.7%	9.6%
 Furniture, Appliances & Electronics	630	-2.1%	-0.4%	5.5%
 Health Goods & Services	637	0.9%	1.9%	5.6%
 Home & Building Supplies	631	-1.6%	-0.2%	5.5%
 Books & Stationery Stores	136	-0.2%	-8.6%	1.2%
 Liquor Stores	277	-1.8%	3.5%	2.4%
 Recreation & Entertainment	464	-2.9%	-4.0%	4.1%
 Supermarkets & Food Retailers	3,925	-1.1%	1.9%	34.3%
 Travel & Accommodation	790	-2.9%	2.9%	6.9%
 <b>TOTAL RETAIL SPEND</b>	<b>11,445</b>	<b>-2.7%</b>	<b>0.9%</b>	<b>100%</b>

## Quarterly spend by category (\$M)



## Change vs last year



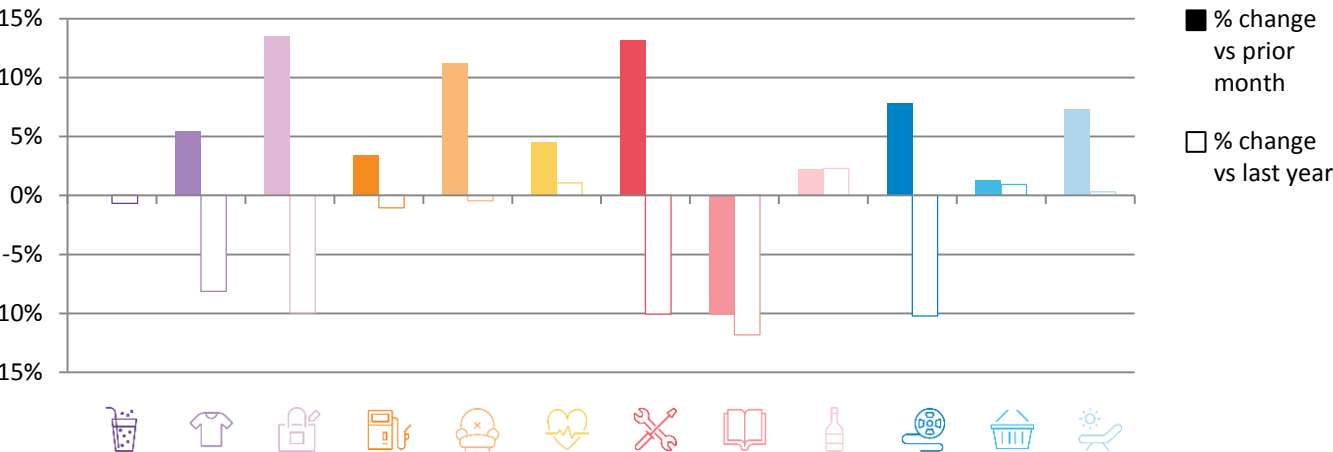
## Selected regions of interest

September 2017

### Monthly trends Southland

Retail spending in the Southland region decreased in eight of the twelve categories compared to September last year. The greatest increase in year on year spend was seen in the Liquor Stores category (+2.3%) and the greatest reduction in year on year spend was seen in the Books & Stationery Stores category (-11.8%), followed closely by Recreation & Entertainment (-10.2%) and Home & Building Supplies (-10.1%).

Compared to August, ten categories experienced an increase in spend. The greatest of these increases were exhibited in Department Stores (+13.5%), followed closely by Home & Building Supplies (+13.2%). Books & Stationery Stores was the only category to experience a month on month decrease (-10.1%).

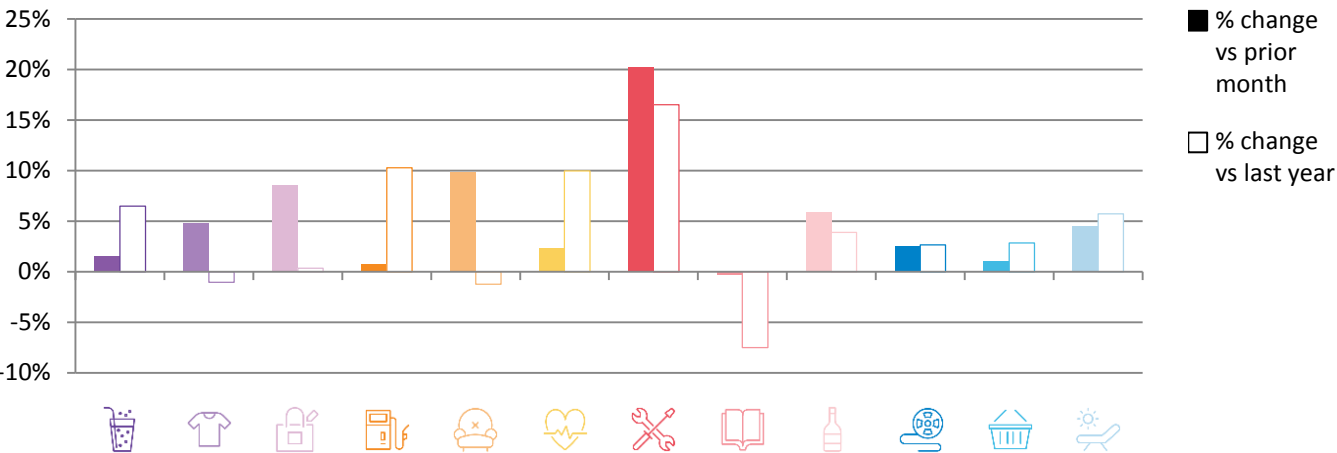


Monthly trends Hawke’s Bay

Retail spend in the Hawke’s Bay region for the 28 days ending 28/09/2017 was \$113.7 million. This represents an increase of 3.6% against the previous month and an increase of 4.7% year on year.

Compared to September 2016, spending was up in nine categories, with Home & Building Supplies (+16.5%), Fuel & Service Stations (+10.3%) and Health Goods & Services (+10.0%) experiencing the largest increases. Books & Stationery Stores (-7.5%) experienced the greatest decrease in year on year spend.

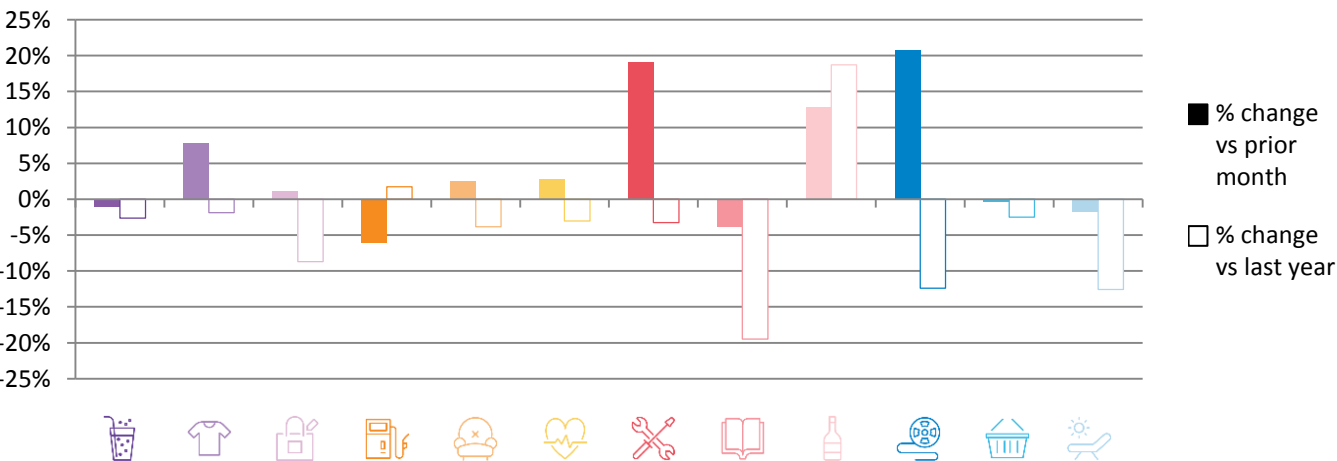
Month on month spend was up in all categories with the exception of Home & Building Supplies which was down by 0.3%. The Home & Building Supplies (+20.2%) category experienced the greatest increase in spend month on month.



Monthly trends West Coast

Retail spending in the West Coast region decreased in ten of the twelve categories year on year. Books & Stationery Stores (-19.5%) had the greatest decreases, followed by the Travel & Accommodation (-12.6%) and Recreation & Entertainment (-12.4%) categories. Liquor Stores (+18.7%) and Fuel & Service Stations (+1.7%) were the only categories that experienced an increase in spend year on year.

Compared to August, seven categories experienced increases in spend. The Recreation & Entertainment category led the way with a 20.7% increase, followed closely by the Home & Building Supplies category, up 19.1%. The greatest decrease in spend was witnessed in the Fuel & Service Stations category month on month, down by 6.1%.



## Going up this month

The greatest increase in spending this month was seen in the Home & Building Supplies category, up 12.0%.

The Otago region experienced the greatest increase in spend this month, up 3.9% when compared to August 2017.

**10**

Categories up

**16**

Regions up

## Going down this month

The largest decrease in spending this month was seen in Health Goods & Services category, down 1.5%.

No regions experienced month on month decreases in September.

**2**

Categories down

**0**

Regions down

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## 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 28/09/2017

Total online retail spend in New Zealand for the 28 days ending 28 September 2017 was \$370 million. This represents an increase of 9.1% year on year and a decrease of 1.1% against the previous month.

Online spending was up in seven of the ten categories year on year. Supermarkets & Food Retailers (+30.9%) saw the greatest increase in spending while Liquor Stores (-7.3%) exhibited the greatest decrease.

Spending has largely decreased from the previous month with seven of the ten categories experiencing decreases. The greatest decreases in spend were exhibited by Liquor Stores (-10.7%) followed by Books and Stationery Stores (-7.3%). Department Stores (+11.8%), Recreation & Entertainment (+5.9%) and Health Goods & Services (+5.7%) were the only categories that had increases in spend month on month.

Online Retailer Category		Month Total \$M	% Change vs Prior Month	% Change vs Last Year	% Share
	Clothing & Footwear	24.4	-3.5%	12.7%	6.6
	Department Stores	7.2	11.8%	21.1%	2.0
	Furniture, Appliances & Electronics	24.9	-3.8%	23.1%	6.7
	Health Goods & Services	7.9	5.7%	-5.1%	2.13
	Home & Building Supplies	2.6	-3.6%	4.6%	0.71
	Books & Stationery Stores	6.9	-7.3%	-7.1%	1.85
	Liquor Stores	2.1	-10.7%	-7.3%	0.56
	Recreation & Entertainment	84.0	5.9%	20.6%	22.7
	Supermarkets & Food Retailers	34.1	-0.2%	30.9%	9.2
	Travel & Accommodation	176.6	-3.9%	0.5%	47.6
	<b>Total Online Retail Spend</b>	<b>370.7</b>	<b>-1.1%</b>	<b>9.1%</b>	<b>100.0</b>

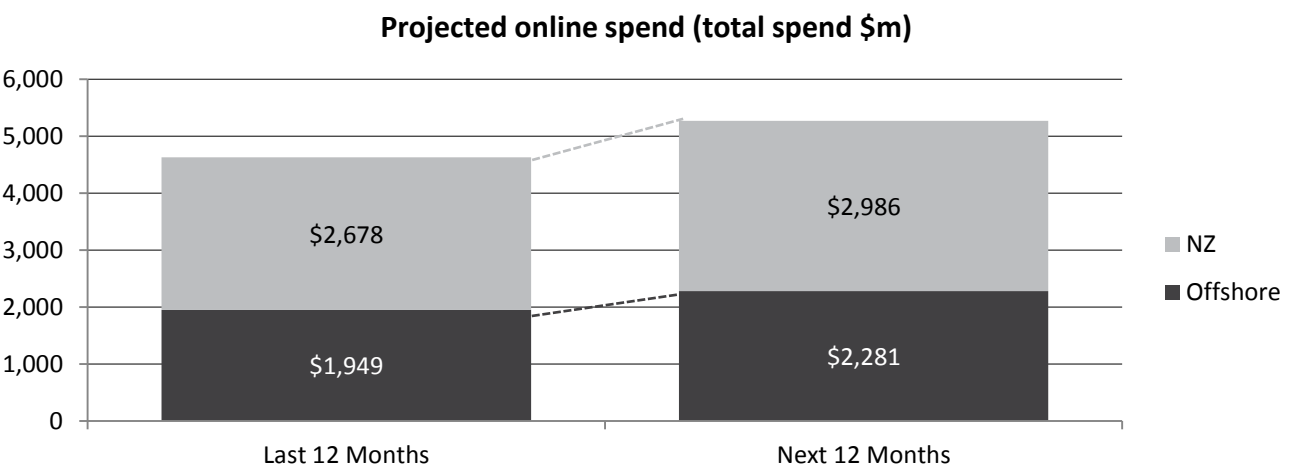
# Online: New Zealand vs Off Shore

New Zealand merchants accounted for 58.9% of online spend for the month of September. This was an increase of 4.4% compared to the previous month and an increase of 7.4% compared to the previous year.

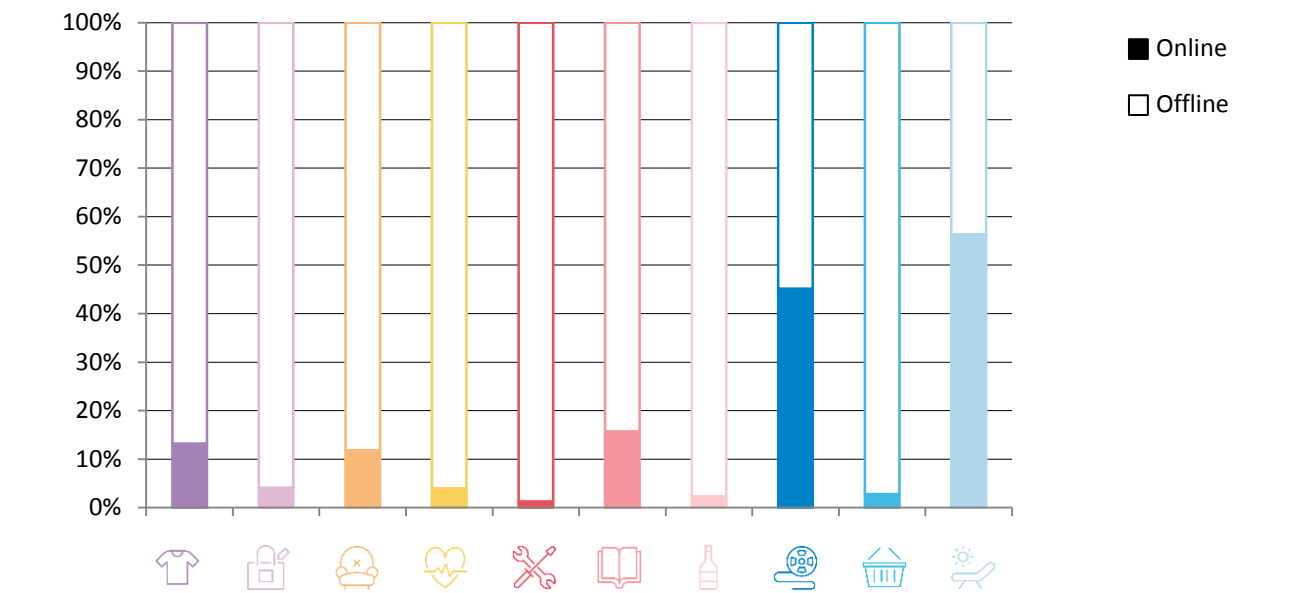
For New Zealand merchants, eight of the ten categories saw increases in spend compared to August. Health Goods & Services saw the greatest increase (+19.3%), followed closely by Recreation & Entertainment (+19.2%). The greatest monthly decrease in spend was seen in the Books & Stationery Stores category (-10.7%).

Spend at offshore retail decreased by 8.1% when compared to the previous month but increased by 11.8% when compared to the same period last year. Offshore merchants saw increases in spend in six categories year on year, the largest in Supermarkets/Food Retailers (+27.3%). In contrast, when compared to the previous month, the Department Stores category was the only category to show an increase, up 29.1%.

## Projected total online spend (\$M)














## % share of category spend



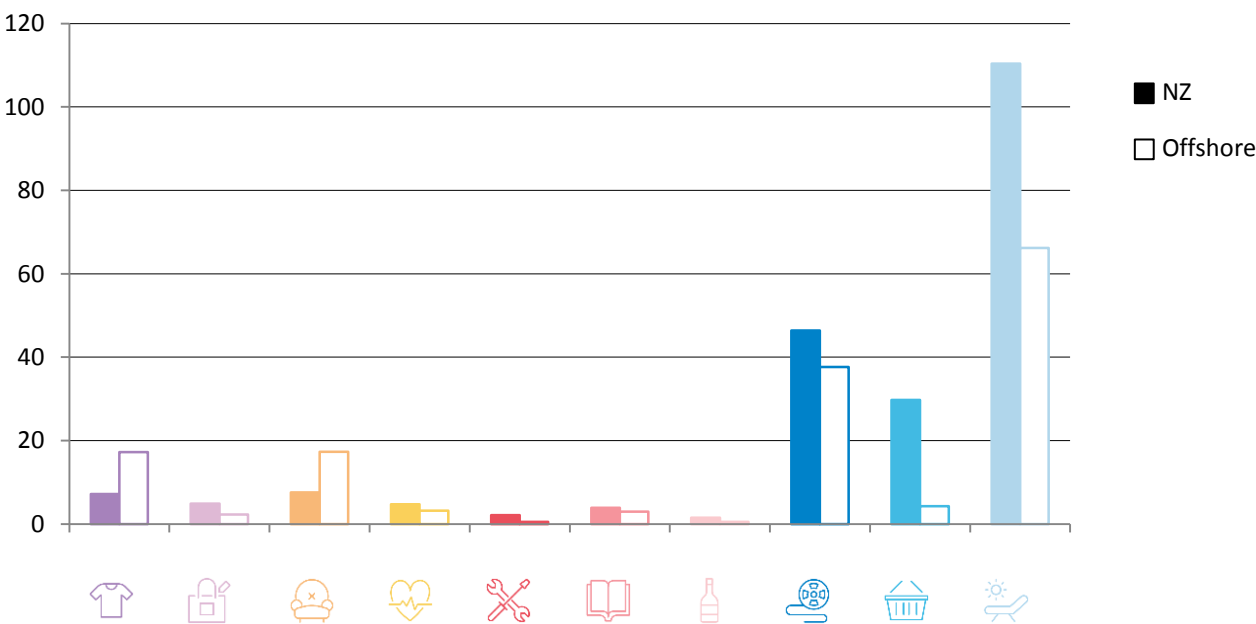


# Online retail market summary New Zealand vs Offshore merchants

September 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	7.2	17.2	-4.2%	-3.2%	14.2%	12.2%
 Department Stores	4.9	2.3	5.3%	29.1%	38.0%	-4.1%
 Furniture, Appliances & Electronics	7.6	17.3	5.0%	-7.2%	35.6%	18.4%
 Health Goods & Services	4.7	3.2	19.3%	-9.7%	8.0%	-19.6%
 Home & Building Supplies	2.1	0.5	5.0%	-27.8%	9.5%	-11.6%
 Books & Stationery Stores	3.9	3.0	-10.7%	-2.6%	-16.8%	9.4%
 Liquor Stores	1.5	0.6	5.6%	-37.1%	0.0%	-22.5%
 Recreation & Entertainment	46.4	37.7	19.2%	-6.8%	20.4%	20.8%
 Supermarkets & Food Retailers	29.8	4.3	1.3%	-9.5%	31.4%	27.3%
 Travel & Accommodation	110.4	66.2	0.6%	-10.6%	-3.5%	8.0%
 <b>Total Retail Spend</b>	<b>218.5</b>	<b>152.3</b>	<b>4.4%</b>	<b>-8.1%</b>	<b>7.4%</b>	<b>11.8%</b>

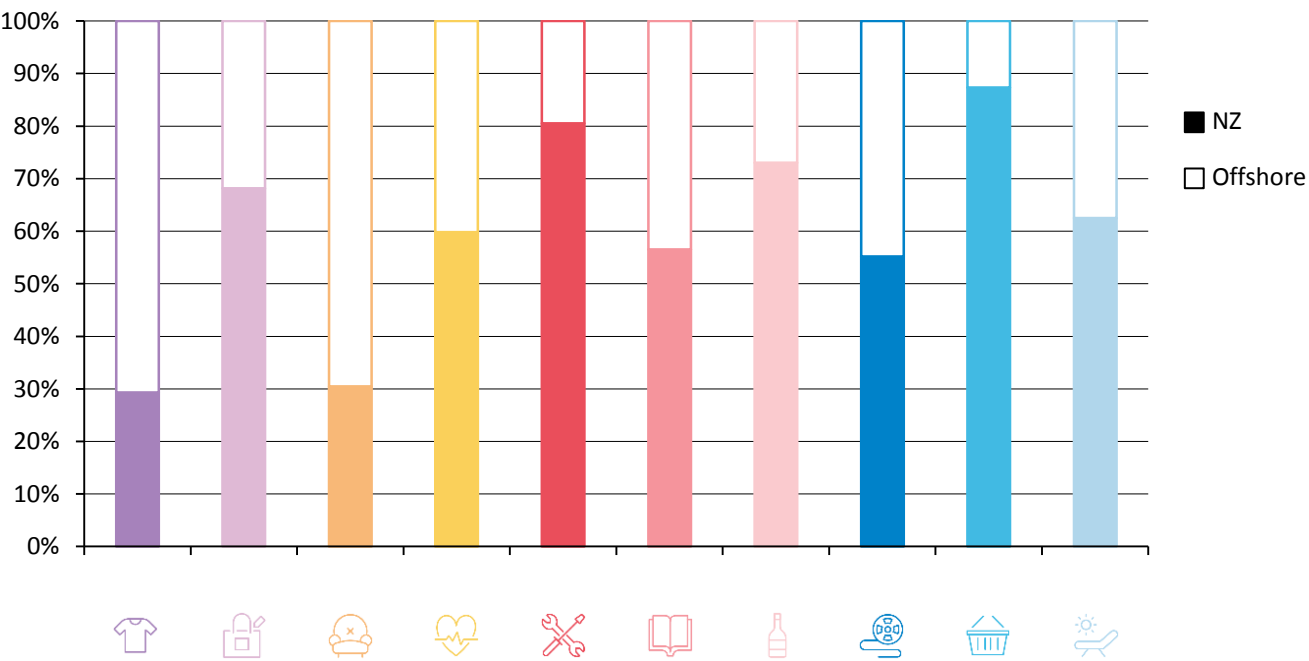
## Online retailer total revenue by category (\$M)



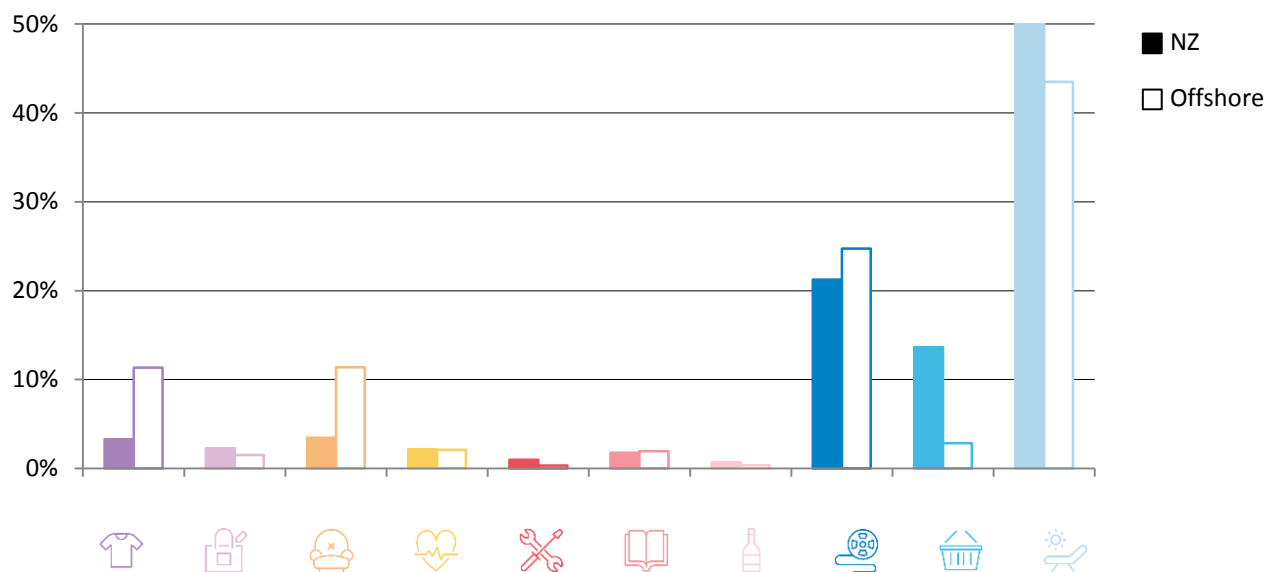
# Monthly online revenue change YOY



# 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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