



Retailwatch














Value of electronic card transactions within retail categories

Period ending 28/10/2017

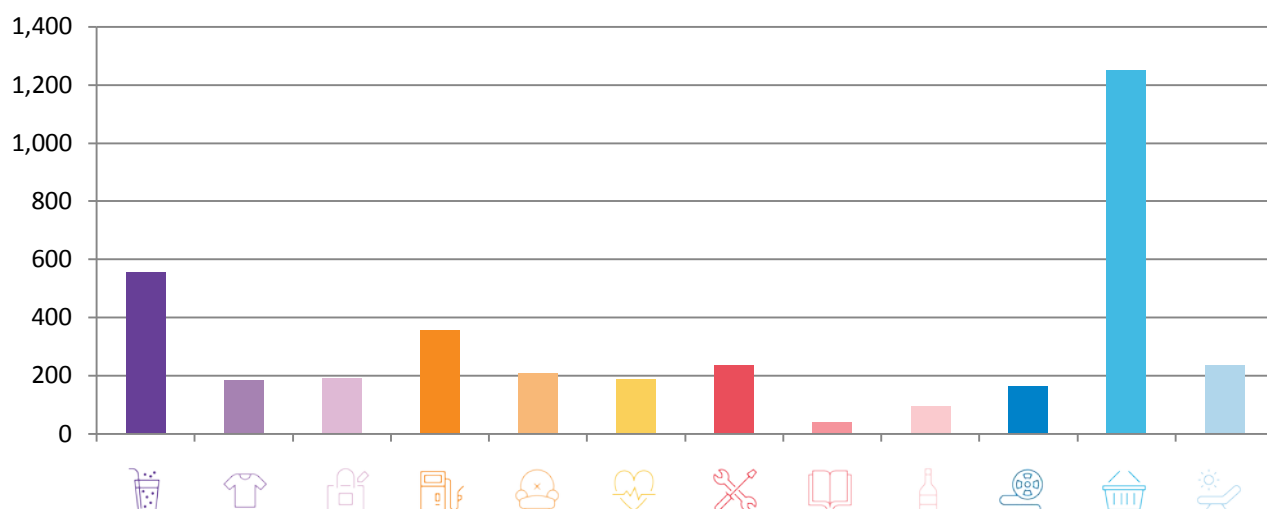
Total retail spend in New Zealand for the 28 days ending 28 October 2017 was \$3.71 billion. This was an increase of 3.7% compared to September and an increase of 1.1% when compared to the same period last year.

Spending was up in 7 categories year-on-year, with Liquor Stores (+6.1%) again showing the greatest increase followed by Cafés, Restaurants & Bars (+4.3%). The Books & Stationery Stores category exhibited the greatest decrease again year-on-year, declining 7.3%. This was followed by the Clothing & Footwear and Recreation and Entertainment categories, down 4.0% and 1.4% respectively.

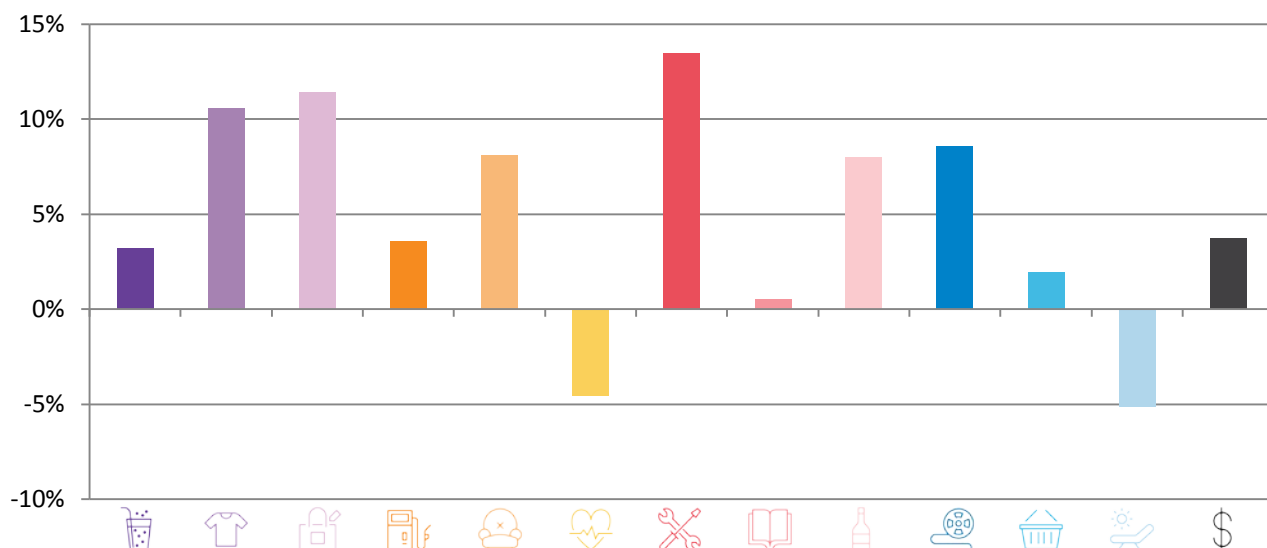
Month-on-month, ten of the twelve categories experienced increases in spend. The largest increase was seen in Home & Building Supplies (+13.5%). The greatest month-on-month decrease was seen in the Travel & Accommodation category, down 5.1%.

Retailer Category	Month Total \$M	% Change vs Prior Month	% Change vs Last Year	% Share
 Cafés, Restaurants & Bars	556	3.2%	4.3%	15.0%
 Clothing & Footwear	186	10.6%	-4.0%	5.0%
 Department Stores	193	11.4%	1.1%	5.2%
 Fuel & Service Stations	357	3.6%	2.8%	9.6%
 Furniture, Appliances & Electronics	209	8.1%	-0.9%	5.6%
 Health Goods & Services	188	-4.6%	-0.7%	5.1%
 Home & Building Supplies	236	13.5%	0.8%	6.4%
 Books & Stationery Stores	41	0.5%	-7.3%	1.1%
 Liquor Stores	95	8.0%	6.1%	2.5%
 Recreation & Entertainment	163	8.6%	-1.4%	4.4%
 Supermarkets & Food Retailers	1,251	1.9%	1.1%	33.7%
 Travel & Accommodation	237	-5.1%	0.3%	6.4%
 TOTAL RETAIL SPEND	3,713	3.7%	1.1%	100%

Monthly retail spend by category (\$M)



Change vs last year



Quarterly summary

October 2017














The total quarterly retail spend for the 91 days ending 28 October 2017 was \$11.67 billion. This was an increase of 0.6% when compared to the previous quarter and an increase of 1.4% when compared to the same period last year.

Six of the twelve categories experienced an increase in spend when compared to the previous quarter. The largest increase in spending was in the Home & Building Supplies category (+12.6%), followed by Liquor Stores (+5.2%). The greatest decrease in spend was seen in Clothing & Footwear (-10.4%), followed by Department Stores (-8.0%).

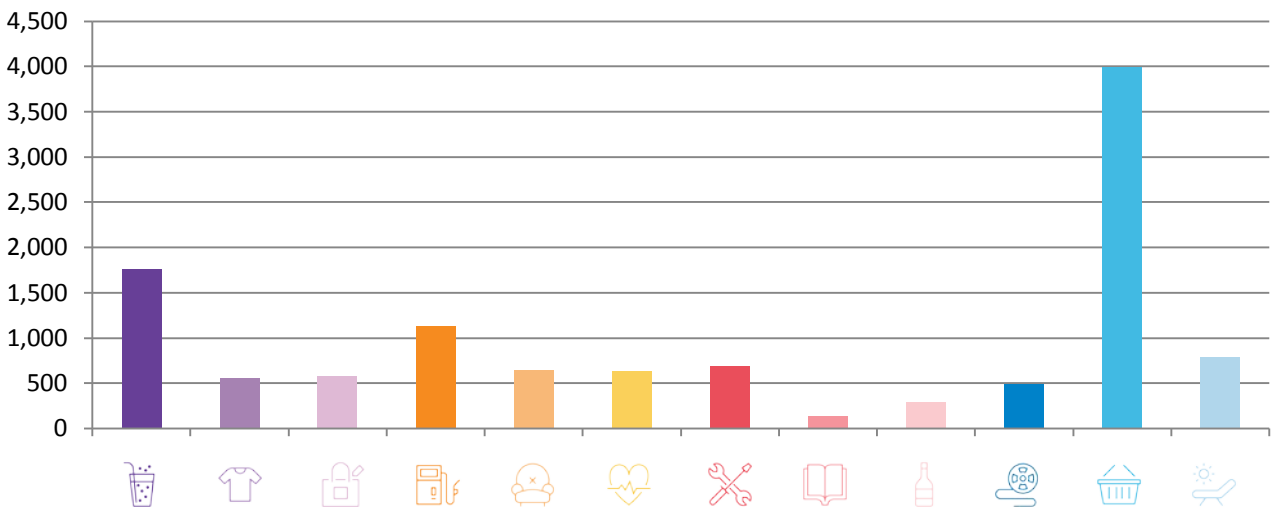
Compared to the same quarter of the previous year, spending increased in seven of the twelve categories, with Liquor Stores again showing the greatest increase, up 5.2%. Similarly, Books & Stationery Stores (-7.6%) again showed the greatest decrease year-on-year, followed by Clothing & Footwear (-3.5%).

Quarterly summary

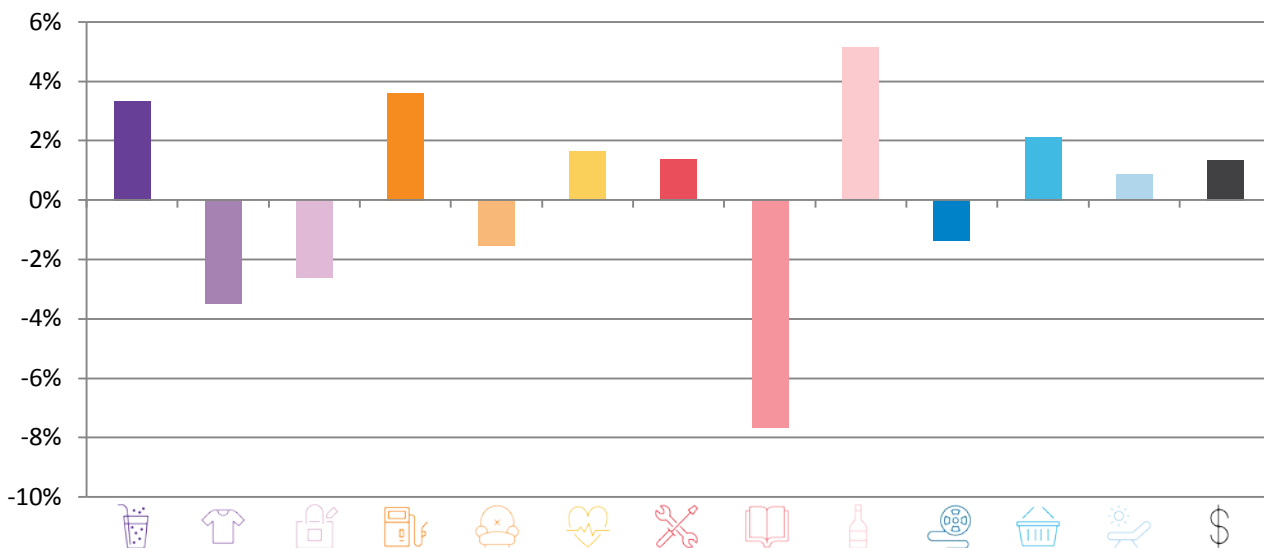
October 2017

Retailer Category	Quarter Total \$M	% Change vs Prior Quarter	% Change vs Last Year	% Share
 Cafés, Restaurants & Bars	1,764	1.5%	3.3%	15.1%
 Clothing & Footwear	557	-10.4%	-3.5%	4.8%
 Department Stores	575	-8.0%	-2.6%	4.9%
 Fuel & Service Stations	1,130	2.1%	3.6%	9.7%
 Furniture, Appliances & Electronics	641	-1.0%	-1.5%	5.5%
 Health Goods & Services	630	-2.2%	1.6%	5.4%
 Home & Building Supplies	692	12.6%	1.4%	5.9%
 Books & Stationery Stores	133	-4.6%	-7.6%	1.1%
 Liquor Stores	289	5.2%	5.2%	2.5%
 Recreation & Entertainment	484	2.9%	-1.4%	4.1%
 Supermarkets & Food Retailers	3,990	2.1%	2.1%	34.2%
 Travel & Accommodation	783	-2.6%	0.9%	6.7%
 TOTAL RETAIL SPEND	11,669	0.6%	1.4%	100%

Quarterly spend by category (\$M)



Change vs last year



Selected regions of interest

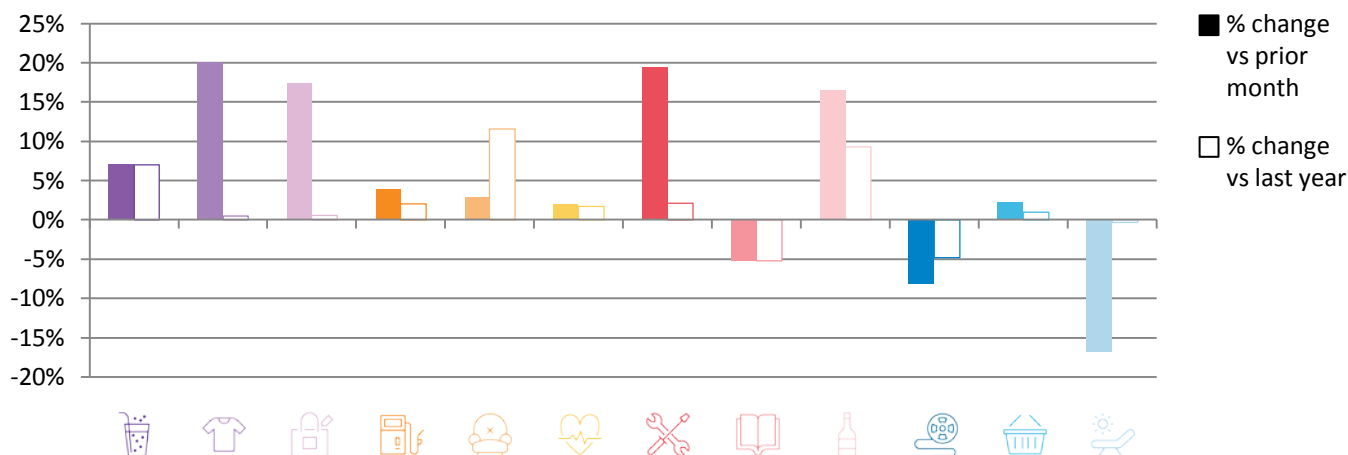
October 2017

Monthly trends Taranaki

Retail spend in the Taranaki region for the 28 days ending 28/10/2017 was \$96.1 million. This represents an increase of 5.7% from the previous month and an increase of 2.4% year-on-year.

Retail spending in the Taranaki region increased in eight of the twelve categories compared to October last year. The greatest increase in year-on-year spend was seen in the Recreation & Entertainment category (+10.9%), followed closely by the Department Stores category (+10.0%). The greatest reduction in year-on-year spend was seen in the Books & Stationery Stores category (-7.2%).

Compared to September, ten categories experienced an increase in spend. The greatest of these increases were exhibited in the Recreation & Entertainment category (+28.0%), followed closely by Department Stores (+21.8%). Health Goods & Services and Books & Stationery Stores were the only categories to experience a month-on-month decrease in spend, declining 10.7% and 4.9% respectively.

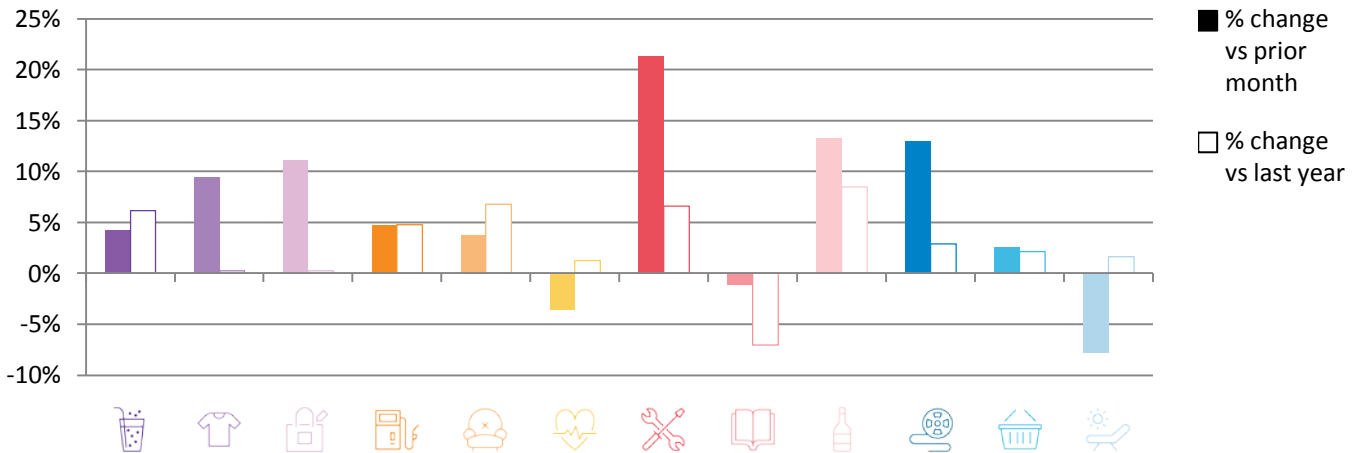


Monthly trends Wellington

Retail spend in the Wellington region for the 28 days ending 28/10/2017 was \$404.7 million. This represents an increase of 4.2% against the previous month and an increase of 3.2% year-on-year.

Compared to October 2016, spending was up in eleven categories, with Liquor Stores (+8.5%), Furniture, Appliances & Electronics (+6.8%) and Home & Building Supplies (+6.6%) experiencing the largest increases. Books & Stationery Stores (-7.0%) experienced the only decrease in year-on-year spend.

Month-on-month spend was up in nine categories with Home & Building Supplies (+21.3%) experiencing the largest increase in spend, followed by Liquor Stores (+13.3%) and Recreation & Entertainment (13.0%). The Travel & Accommodation category experienced the greatest decrease in month-on-month spend, down 7.8%.

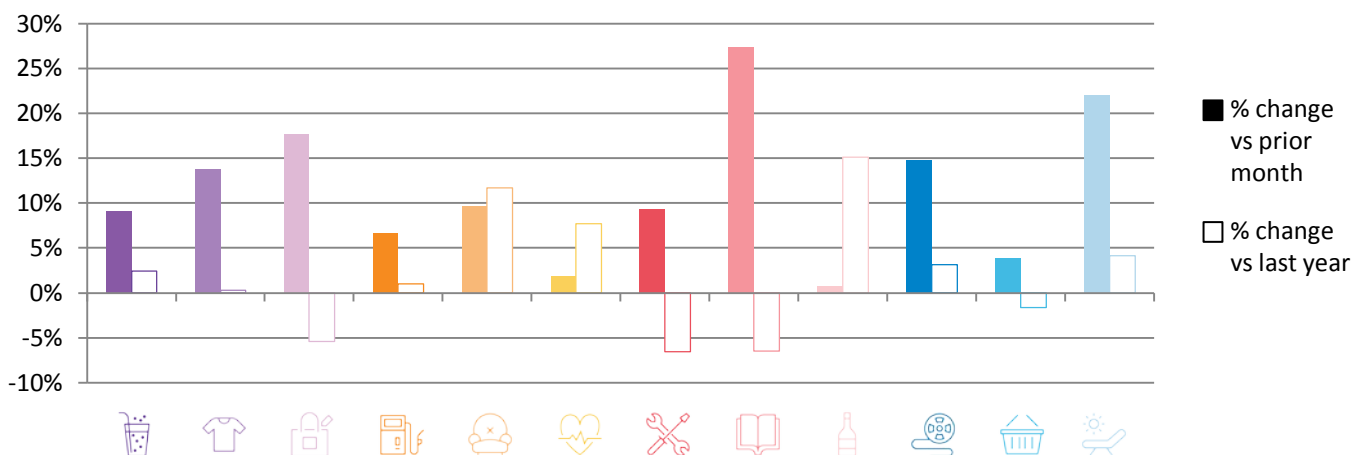


Monthly trends West Coast

Retail spend in the West Coast region for the 28 days ending 28/10/2017 was \$22.9 million. This represents an increase of 7.9% against the previous month and an increase of 0.2% year-on-year.

Retail spending in the West Coast region increased in eight of the twelve categories year-on-year. Liquor Stores (15.1%) experienced the greatest increase in spend, followed by Furniture, Appliances & Electronics (+11.7%). The greatest decrease in spend was witnessed in the Home & Building Supplies and Books & Stationery Stores categories, both declining 6.5%.

Compared to September, all categories experienced increases in spend. The Books & Stationery Stores category led the way with a 27.3% increase, followed by the Travel & Accommodation category (+22.0%) and Department Stores (+17.6%).



Going up this month

The greatest increase in spending this month was again seen in the Home & Building Supplies category, up 13.5%.

The West Coast region experienced the greatest increase in spend this month, up 7.9% when compared to September 2017.

10

Categories up

16

Regions up

Going down this month

The largest decrease in spending this month was seen in the Travel & Accommodation category, down 5.1%.

No regions experienced month-on-month decreases in October.

2

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 Retailwatch












Online retail market summary

Period ending 28/10/2017

Total online retail spend in New Zealand for the 28 days ending 28 October 2017 was \$366 million. This represents an increase of 9.6% year-on-year and a decrease of 5.4% against the previous month.

Online spending was up in eight of the ten categories year-on-year. Supermarkets & Food Retailers (+22.3%) saw the greatest increase in spending while Home & Building Supplies (-5.6%) exhibited the greatest decrease.

Spending again was largely decreased from the previous month with six of the ten categories experiencing decreases. The greatest decreases in spend were exhibited by Furniture/Appliances/Electronics (-11.3%) followed by Travel & Accommodation (-9.2%). Liquor Stores (+15.4%) and Books & Stationery Stores (+7.5%) saw the greatest increases in spend month-on-month.

Online Retailer Category	Month Total \$M	% Change vs Prior Month	% Change vs Last Year	% Share
 Clothing & Footwear	26.1	1.8%	12.8%	7.1%
 Department Stores	7.8	7.0%	8.2%	2.1%
 Furniture, Appliances & Electronics	23.5	-11.3%	12.9%	6.4%
 Health Goods & Services	8.1	-6.2%	11.6%	2.2%
 Home & Building Supplies	2.7	-4.9%	-5.6%	0.7%
 Books & Stationery Stores	7.6	7.5%	-1.3%	2.1%
 Liquor Stores	2.3	15.4%	11.3%	0.6%
 Recreation & Entertainment	86.0	-2.0%	14.1%	23.5%
 Supermarkets & Food Retailers	34.1	-1.2%	22.3%	9.3%
 Travel & Accommodation	167.3	-9.2%	5.1%	45.8%
 Total Online Retail Spend	365.6	-5.4%	9.6%	100.0

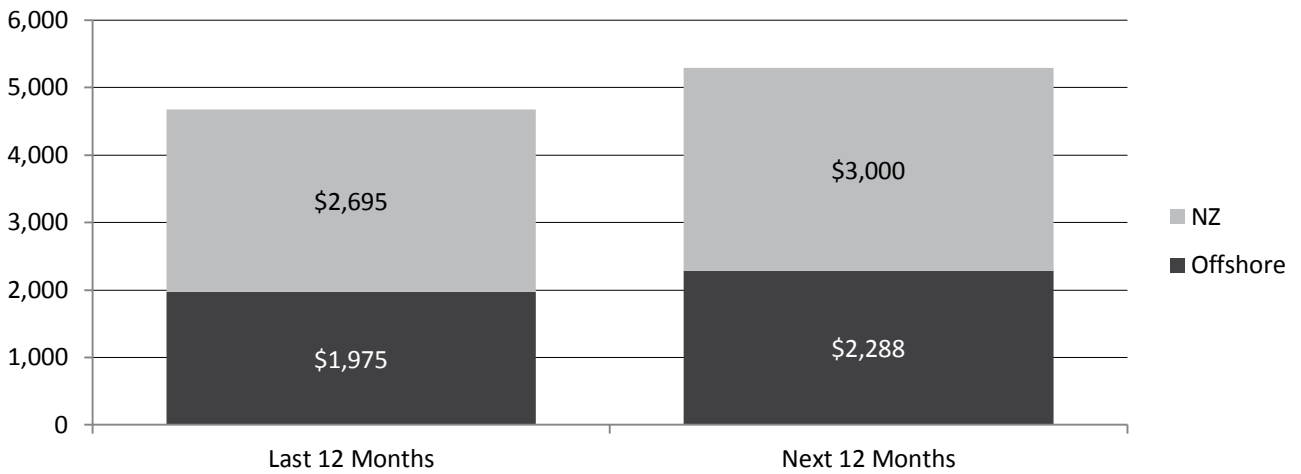
Online: New Zealand vs Offshore

New Zealand merchants accounted for 58.3% of online spend for the month of October. This was a decrease of 3.9% compared to the previous month and an increase of 7.8% compared to the previous year.

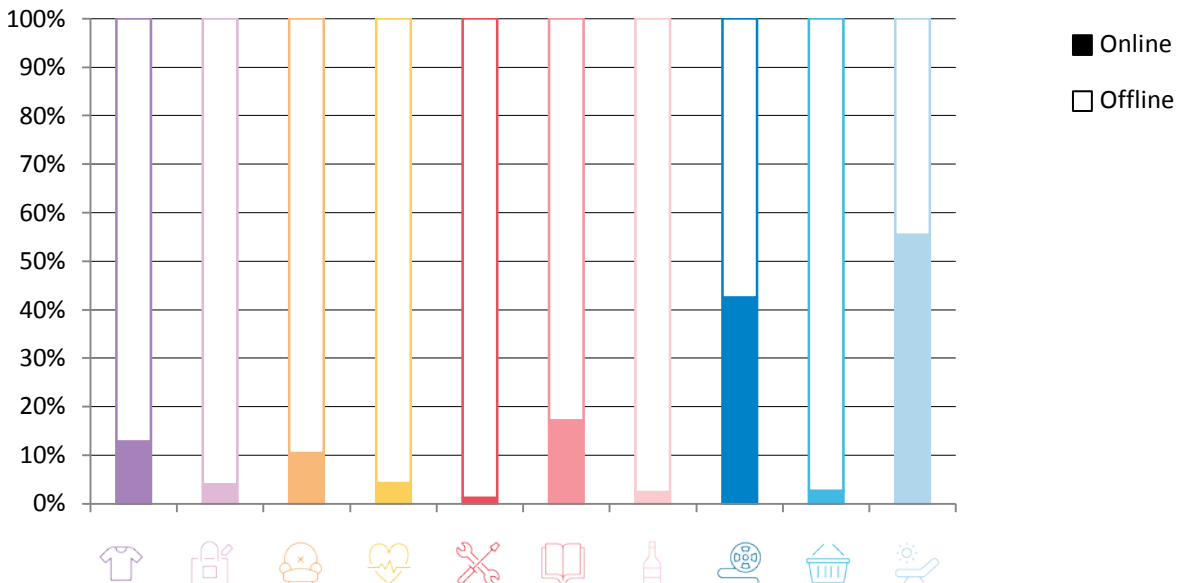
For New Zealand merchants, four of the ten categories saw increases in spend compared to September with Department Stores (+28.3%) and Liquor Stores (+20.7%) experiencing the greatest increases in spend. Health Goods & Services saw the greatest decrease (-15.1%), followed by Furniture / Appliances / Electronics (-12.1%) and Travel & Accommodation (-7.9%).

Spend at offshore retail decreased by 7.5% when compared to the previous month but increased by 12.2% when compared to the same period last year. Offshore merchants saw increases in spend in seven categories year-on-year, the largest in Health Goods & Services(+36.3%). In contrast, when compared to the previous month, only three categories experienced increases in spend. These included Books & Stationery Stores (+8.3%), Health Goods & Services (+5.4%) and Liquor Stores (+5.4%).

Projected total online spend (\$M)














% share of category spend

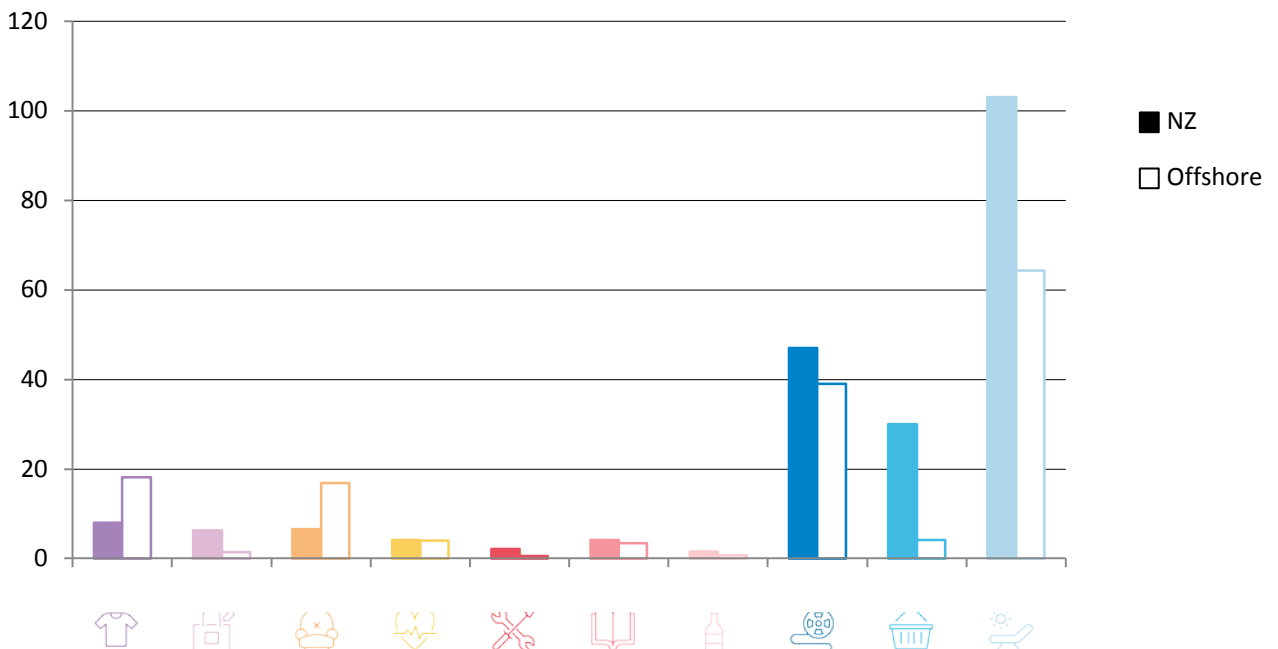


Online retail market summary New Zealand vs Offshore merchants

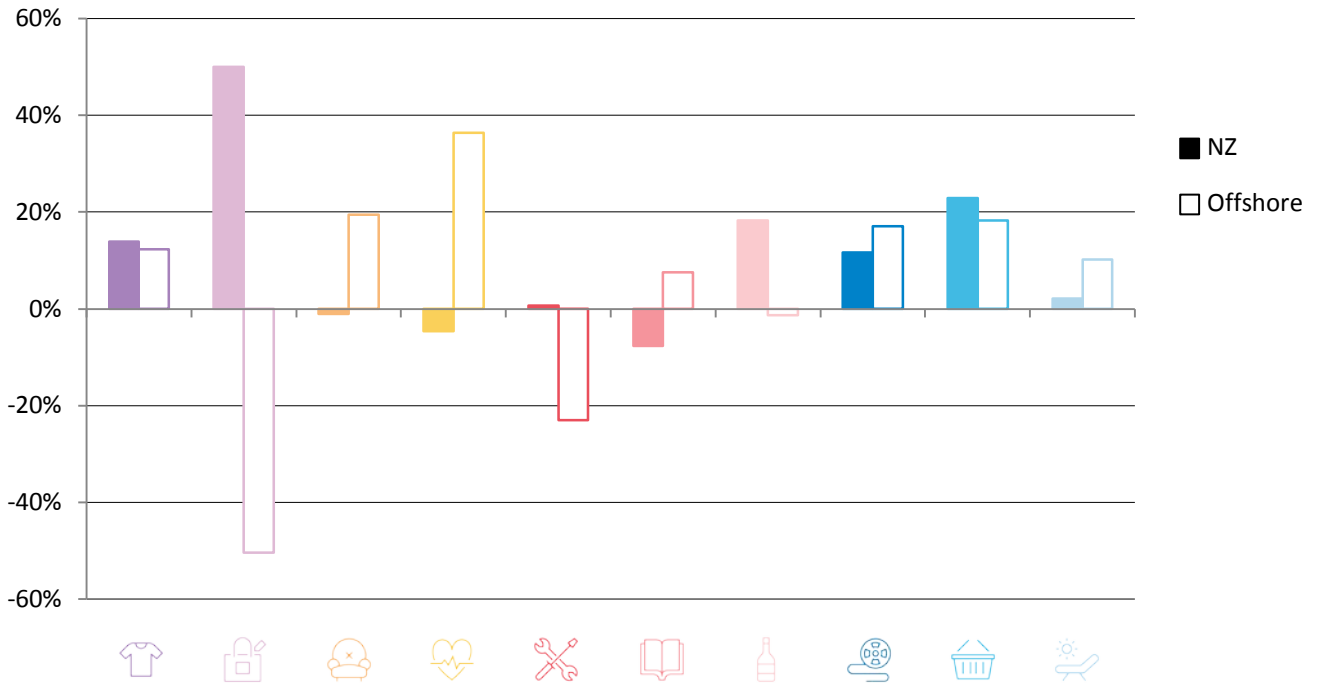
October 2017

Retailer Category	Month Total \$M		% Change vs Prior Month		% Change vs Last Year	
	NZ	Offshore	NZ	Offshore	NZ	Offshore
 Clothing & Footwear	8.0	18.1	9.7%	-1.4%	13.9%	12.3%
 Department Stores	6.4	1.5	28.3%	-37.1%	50.0%	-50.4%
 Furniture, Appliances & Electronics	6.6	16.9	-12.1%	-11.0%	-1.0%	19.5%
 Health Goods & Services	4.2	3.9	-15.1%	5.4%	-4.6%	36.3%
 Home & Building Supplies	2.1	0.6	-4.8%	-5.6%	0.6%	-23.0%
 Books & Stationery Stores	4.1	3.5	6.8%	8.3%	-7.7%	7.6%
 Liquor Stores	1.6	0.7	20.7%	5.4%	18.2%	-1.3%
 Recreation & Entertainment	46.9	39.1	-1.2%	-2.9%	11.7%	17.1%
 Supermarkets & Food Retailers	30.0	4.1	-0.1%	-8.7%	22.8%	18.3%
 Travel & Accommodation	103.1	64.2	-7.9%	-11.2%	2.1%	10.1%
 Total Retail Spend	213.0	152.6	-3.9%	-7.5%	7.8%	12.2%

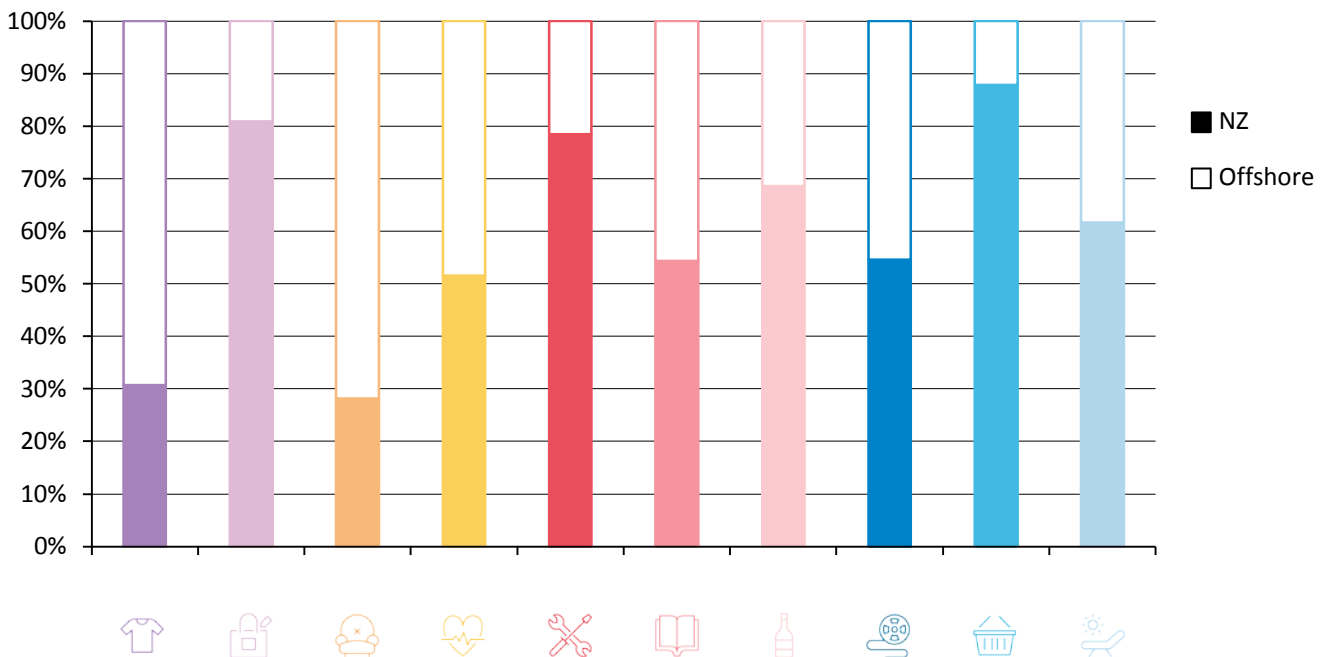
Online retailer total revenue by category (\$M)



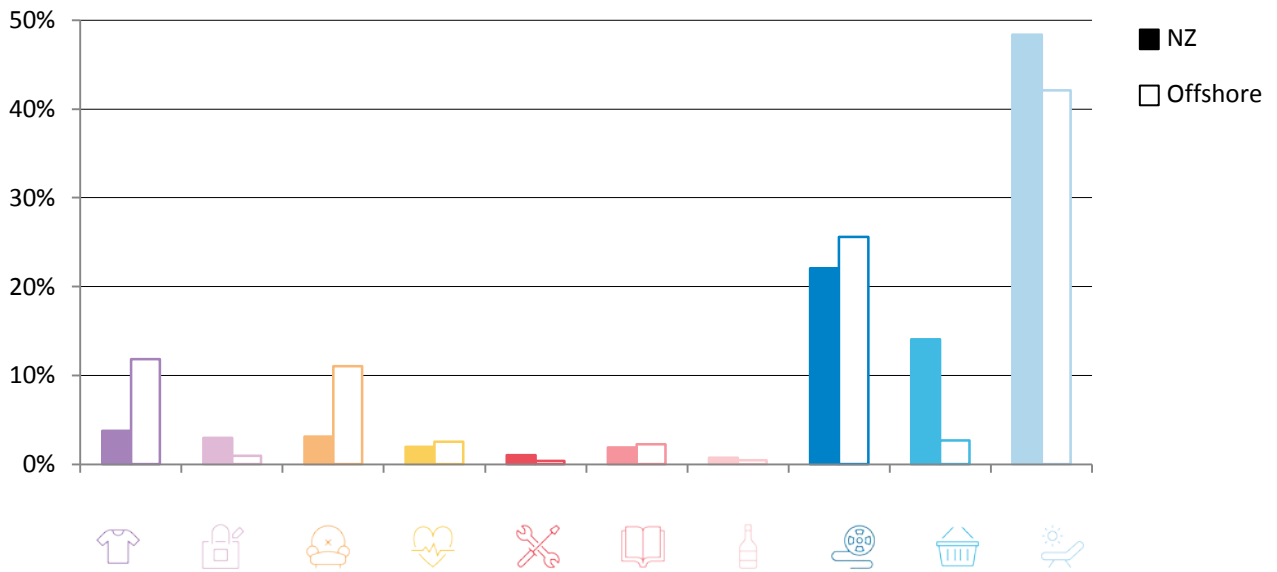
Monthly online revenue change year-on-year



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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