



Retailwatch














Value of electronic card transactions within retail categories

Period ending 28/11/2017

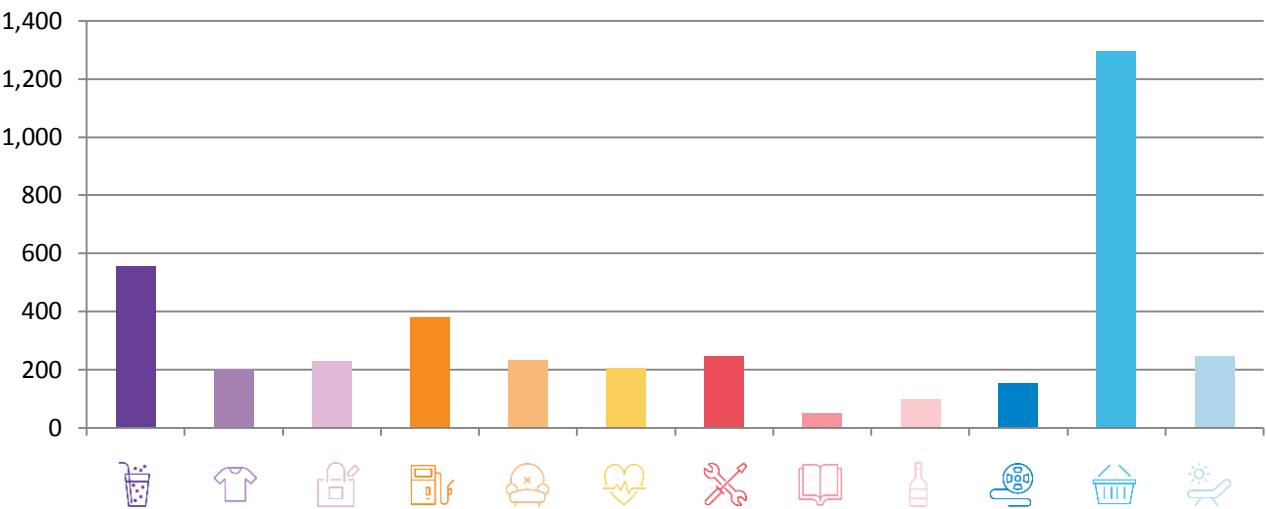
Total retail spend in New Zealand for the 28 days ending 28 November 2017 was \$3.89 billion. This was an increase of 4.9% compared to October and an increase of 2.6% when compared to the same period last year.

Spending was up in eight categories year-on-year, with Travel & Accommodation (+8.1%) showing the greatest increase followed by Fuel & Service Stations (+7.3%). The Recreation & Entertainment category exhibited the greatest decrease year-on-year, declining 7.2%. This was followed by the Books & Stationery Stores category, down 4.0%.

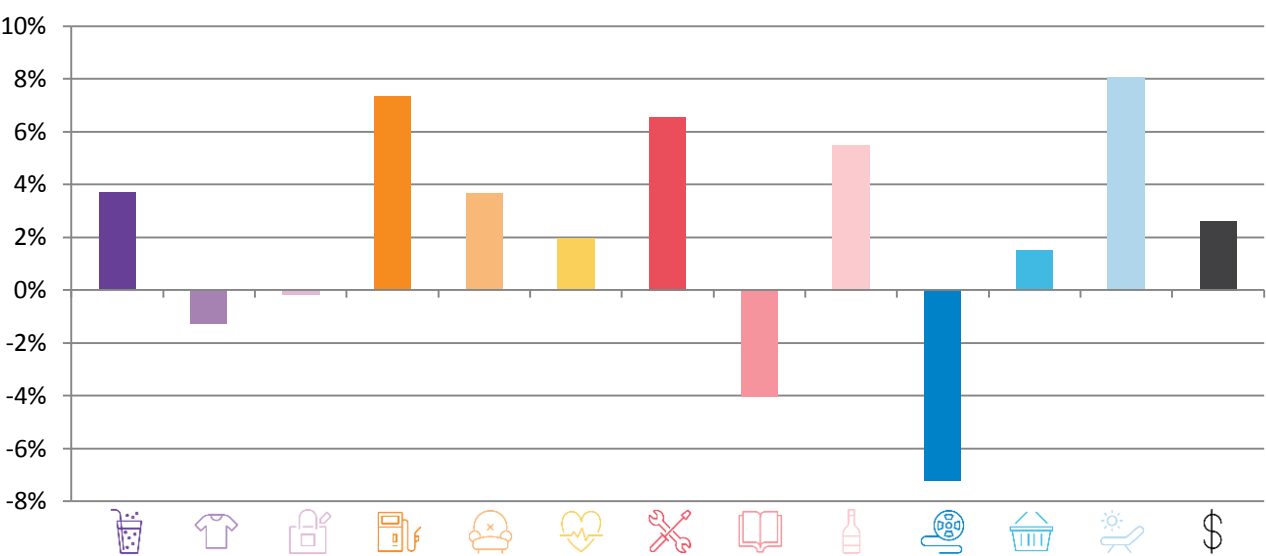
Month-on-month, ten of the twelve categories experienced increases in spend. The largest increases were seen in the Books & Stationery Stores and Department Stores categories, increasing 19.2% and 18.5% respectively. The greatest month-on-month decrease was seen in the Recreation & Entertainment category, down 6.8%.

Retailer Category	Month Total \$M	% Change vs Prior Month	% Change vs Last Year	% Share
 Cafés, Restaurants & Bars	555	-0.2%	3.7%	14.3%
 Clothing & Footwear	201	7.8%	-1.3%	5.2%
 Department Stores	229	18.5%	-0.2%	5.9%
 Fuel & Service Stations	381	6.9%	7.3%	9.8%
 Furniture, Appliances & Electronics	233	10.9%	3.7%	6.0%
 Health Goods & Services	205	9.7%	2.0%	5.3%
 Home & Building Supplies	247	4.5%	6.6%	6.3%
 Books & Stationery Stores	49	19.2%	-4.0%	1.3%
 Liquor Stores	100	6.5%	5.5%	2.6%
 Recreation & Entertainment	152	-6.8%	-7.2%	3.9%
 Supermarkets & Food Retailers	1,294	3.8%	1.5%	33.2%
 Travel & Accommodation	247	3.4%	8.1%	6.3%
 TOTAL RETAIL SPEND	3,893	4.9%	2.6%	100%

Monthly retail spend by category (\$M)



Change vs last year



Quarterly summary

November 2017














The total quarterly retail spend for the 91 days ending 28 November 2017 was \$12.1 billion. This was an increase of 5.9% when compared to the previous quarter and an increase of 1.5% when compared to the same period last year.

Eleven 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 (+24.7%), followed by Recreation & Entertainment (+11.5%) and Liquor Stores (+11.1%). The only decrease in spend was seen in Health Goods & Services (-0.1%).

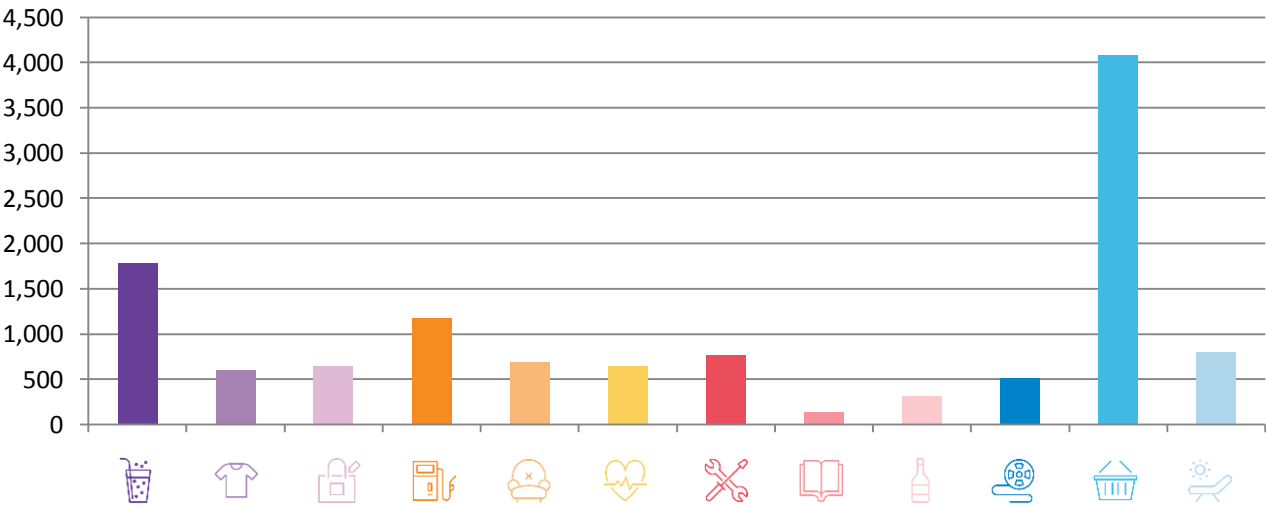
Compared to the same quarter of the previous year, spending increased in seven of the twelve categories, with Liquor Stores again showing the greatest increase, up 5.2%. Similarly, Books & Stationery Stores (-6.6%) again showed the greatest decrease year-on-year, followed by Recreation & Entertainment (-3.2%).

Quarterly summary

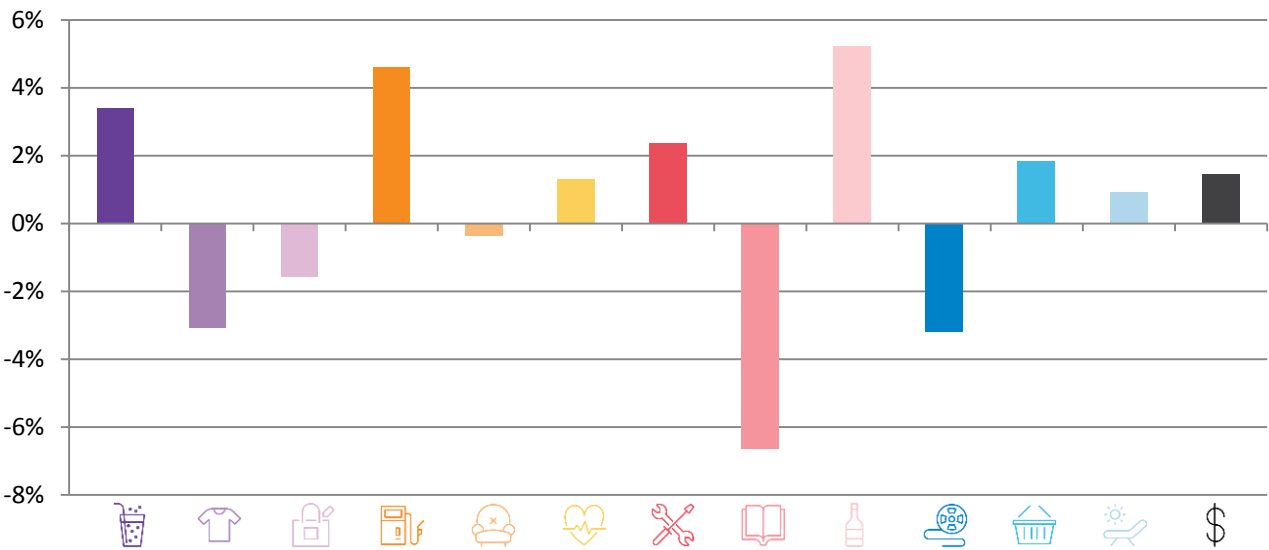
November 2017

Retailer Category	Quarter Total \$M	% Change vs Prior Quarter	% Change vs Last Year	% Share
 Cafés, Restaurants & Bars	1,784	2.5%	3.4%	14.7%
 Clothing & Footwear	598	3.4%	-3.1%	4.9%
 Department Stores	640	9.6%	-1.6%	5.3%
 Fuel & Service Stations	1,170	6.8%	4.6%	9.7%
 Furniture, Appliances & Electronics	684	6.9%	-0.4%	5.7%
 Health Goods & Services	636	-0.1%	1.3%	5.3%
 Home & Building Supplies	762	24.7%	2.4%	6.3%
 Books & Stationery Stores	140	3.7%	-6.6%	1.2%
 Liquor Stores	306	11.1%	5.2%	2.5%
 Recreation & Entertainment	503	11.5%	-3.2%	4.2%
 Supermarkets & Food Retailers	4,077	4.7%	1.8%	33.7%
 Travel & Accommodation	799	1.7%	0.9%	6.6%
 TOTAL RETAIL SPEND	12,100	5.9%	1.5%	100%

Quarterly spend by category (\$M)



Change vs last year



Selected regions of interest

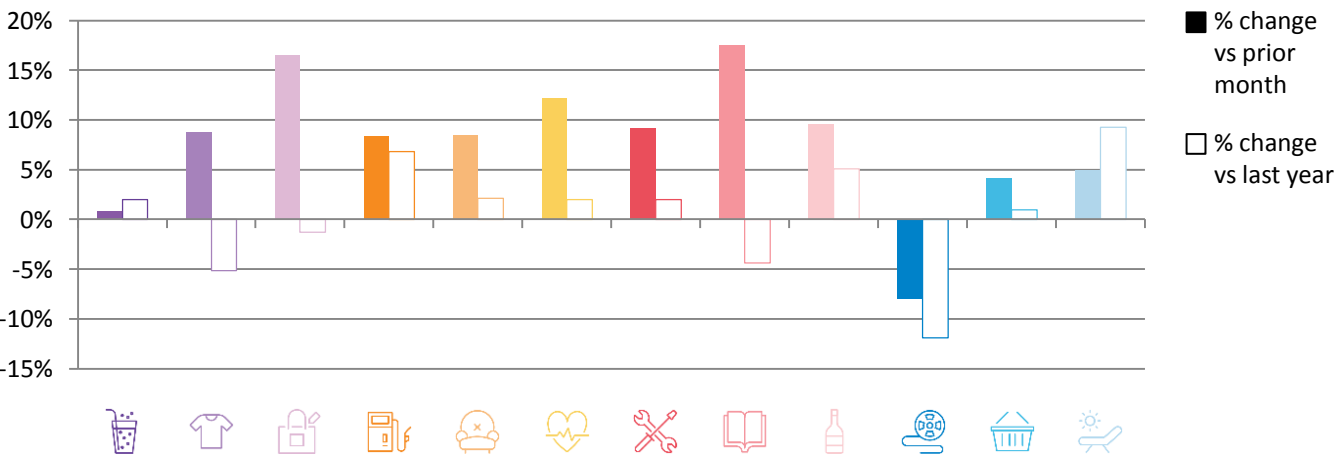
November 2017

Monthly trends Auckland

Retail spend in the Auckland region for the 28 days ending 28/11/2017 was \$1.428 billion. This represents an increase of 5.5% from the previous month and an increase of 1.3% year-on-year.

Retail spending in the Auckland region increased in eight of the twelve categories compared to November last year. The greatest increase in year-on-year spend was seen in the Travel & Accommodation category (+9.2%), followed by the Fuel & Service Stations category (+6.8%). The greatest reduction in year-on-year spend was seen in the Recreation & Entertainment category (-11.9%).

Compared to October, eleven categories experienced an increase in spend. The greatest of these increases were exhibited in the Books & Stationery Stores category (+17.6%), followed closely by Department Stores (+16.5%). Recreation & Entertainment (-8.1%) was the only category to experience a month-on-month decrease in spend.

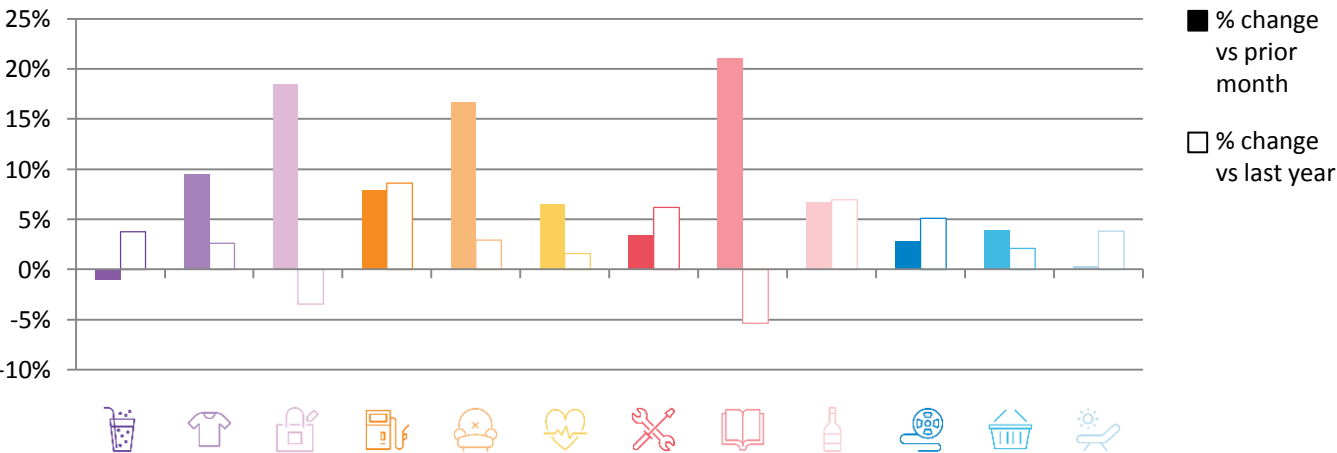


Monthly trends Canterbury

Retail spend in the Canterbury region for the 28 days ending 28/11/2017 was \$494.1 million. This represents an increase of 5.4% against the previous month and an increase of 3.1% year-on-year.

Compared to November 2016, spending was up in ten categories, with Fuel & Service Stations (+8.6%) experiencing the largest increase in spend. Books & Stationery Stores (-5.4%) and Department Stores (-3.5%) experienced the only decreases in year-on-year spend.

Month-on-month spend was up in eleven categories with Books & Stationery Stores (+21.1%) experiencing the largest increase in spend, followed by Department Stores (+18.5%) and Furniture, Appliances & Electronics (16.6%). The Travel & Accommodation category experienced the only decrease in month-on-month spend, down 1.1%.

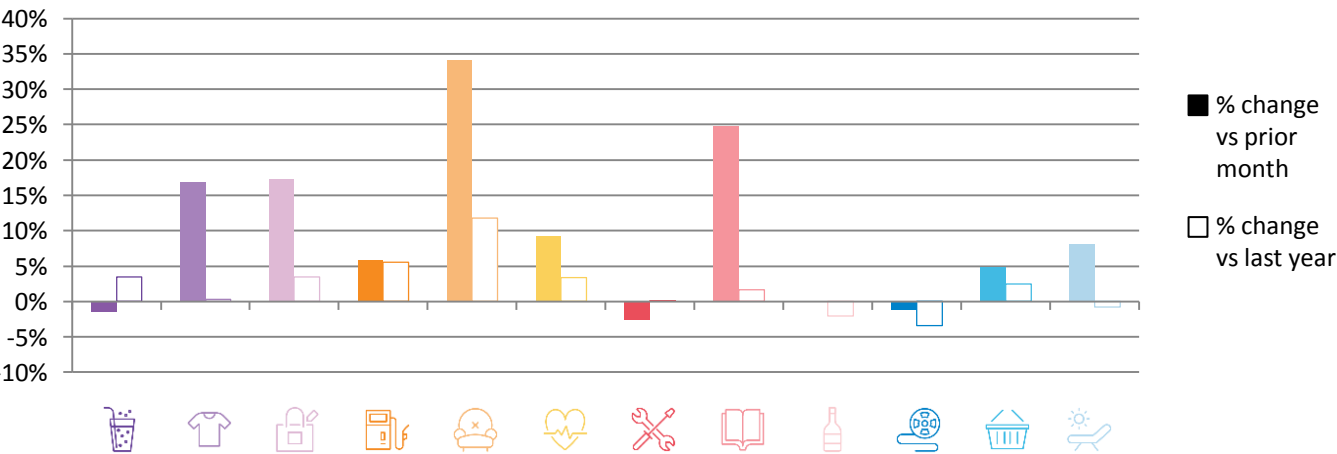


Monthly trends Northland

Retail spend in the Northland region for the 28 days ending 28/11/2017 was \$133.1 million. This represents an increase of 6.3% against the previous month and an increase of 2.8% year-on-year.

Retail spending in the Northland region increased in nine of the twelve categories year-on-year. Furniture, Appliances & Electronics (11.8%) experienced the greatest increase in spend. The only decreases in spend were witnessed in the Recreation & Entertainment and Liquor Stores categories, declining 3.4% and 2.1% respectively.

Compared to October, nine categories experienced increases in spend. The Furniture, Appliances & Electronics category led the way with a 34.0% increase, followed by Books & Stationery Stores (+24.8%) and Department Stores (+17.3%). The greatest decrease was seen in the Home & Building Supplies category (-2.6%).



Going up this month

The greatest increase in spending this month was again seen in the Books & Stationery Stores category, up 19.2%.

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

10

Categories up

16

Regions up

Going down this month

The largest decrease in spending this month was seen in the Recreation & Entertainment category, down 6.8%.

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

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



Disclaimer

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Online Retailwatch












Online retail market summary

Period ending 28/11/2017

Total online retail spend in New Zealand for the 28 days ending 28 November 2017 was \$396 million. This represents an increase of 11.6% year-on-year and an increase of 4.5% against the previous month.

Online spending was up in nine of the ten categories year-on-year. Department Stores (+29.0%) saw the greatest increase in spending, followed by Supermarkets & Food Retailers (+26.2%). The Recreation & Entertainment category (-6.4%) exhibited the only decrease in spend.

Month-on-month, eight of the ten categories experienced increases in spend. The greatest increase in spend was exhibited by Department Stores (+55.6%), followed by Books & Stationery Stores (+33.6%). Recreation & Entertainment (-7.5%) and Health Goods & Services (+0.4%) saw the only decreases in spend month-on-month.

Online Retailer Category		Month Total \$M	% Change vs Prior Month	% Change vs Last Year	% Share
	Clothing & Footwear	35.2	29.3%	15.3%	8.9%
	Department Stores	12.2	55.6%	29.0%	3.1%
	Furniture, Appliances & Electronics	29.6	14.1%	16.3%	7.5%
	Health Goods & Services	8.3	-0.4%	11.1%	2.1%
	Home & Building Supplies	3.7	26.2%	9.4%	0.9%
	Books & Stationery Stores	10.4	33.6%	13.7%	2.6%
	Liquor Stores	3.3	19.5%	6.1%	0.8%
	Recreation & Entertainment	81.7	-7.5%	-6.4%	20.6%
	Supermarkets & Food Retailers	37.1	8.6%	26.2%	9.4%
	Travel & Accommodation	175.1	0.6%	16.6%	44.2%
	Total Online Retail Spend	396.7	4.5%	11.6%	100%

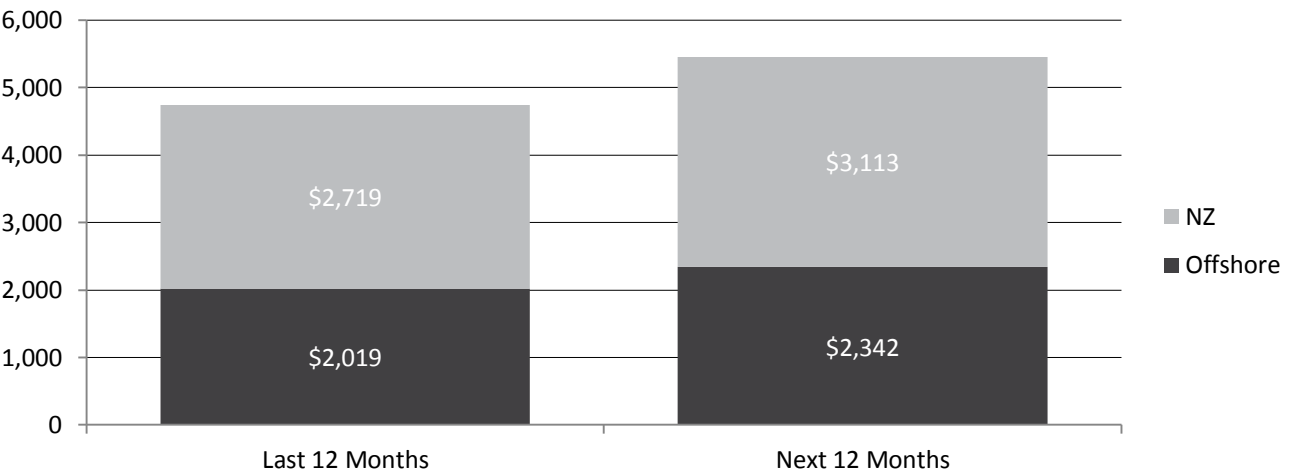
Online: New Zealand vs Offshore

New Zealand merchants accounted for 58.9% of online spend for the month of November. This was a decrease of 9.0% compared to the previous month and an increase of 7.1% compared to the previous year.

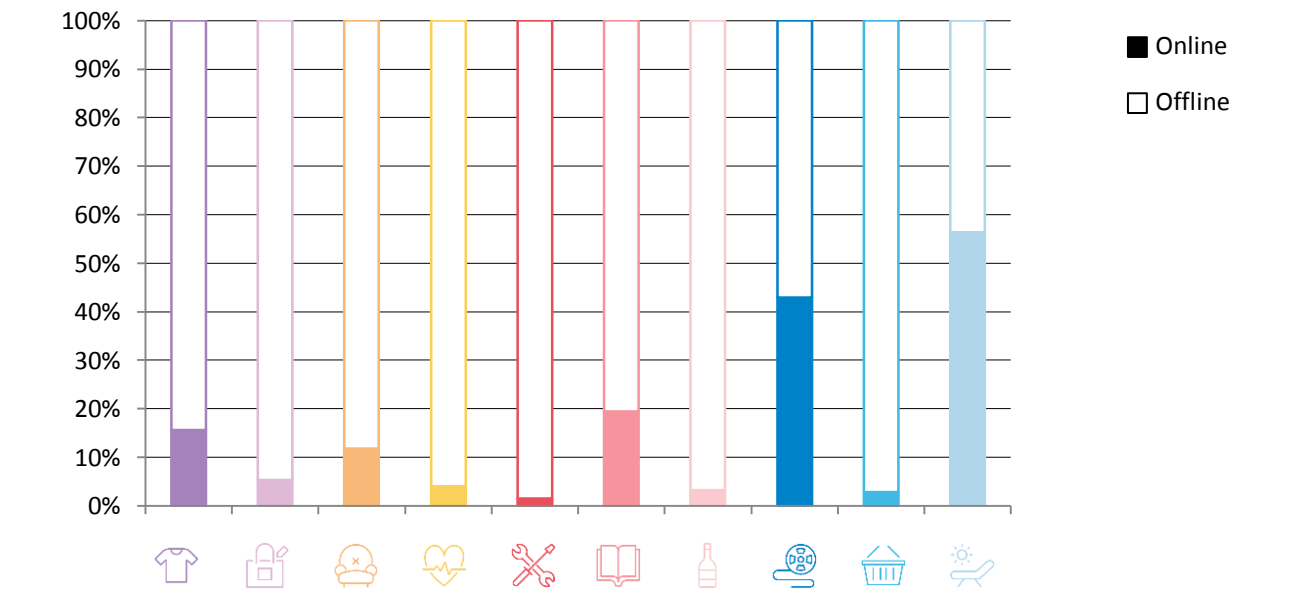
For New Zealand merchants, nine of the ten categories saw increases in spend compared to October, with Department Stores (+61.3%) and Furniture / Appliances / Electronics (+61.2%) experiencing the greatest increases in spend. Recreation & Entertainment saw the only decrease compared to October, declining 6.4%.

Spend at offshore retail decreased by 1.3% when compared to the previous month but increased by 18.8% when compared to the same period last year. Offshore merchants saw increases in spend in seven categories year-on-year, the largest in Liquor Stores (+31.1%). In contrast, when compared to the previous month, only five categories experienced increases in spend. These included Department Stores (+32.3%), Books & Stationery Stores (+31.8%), and Clothing & Footwear (+29.7%).

Projected total online spend (\$M)














% share of category spend

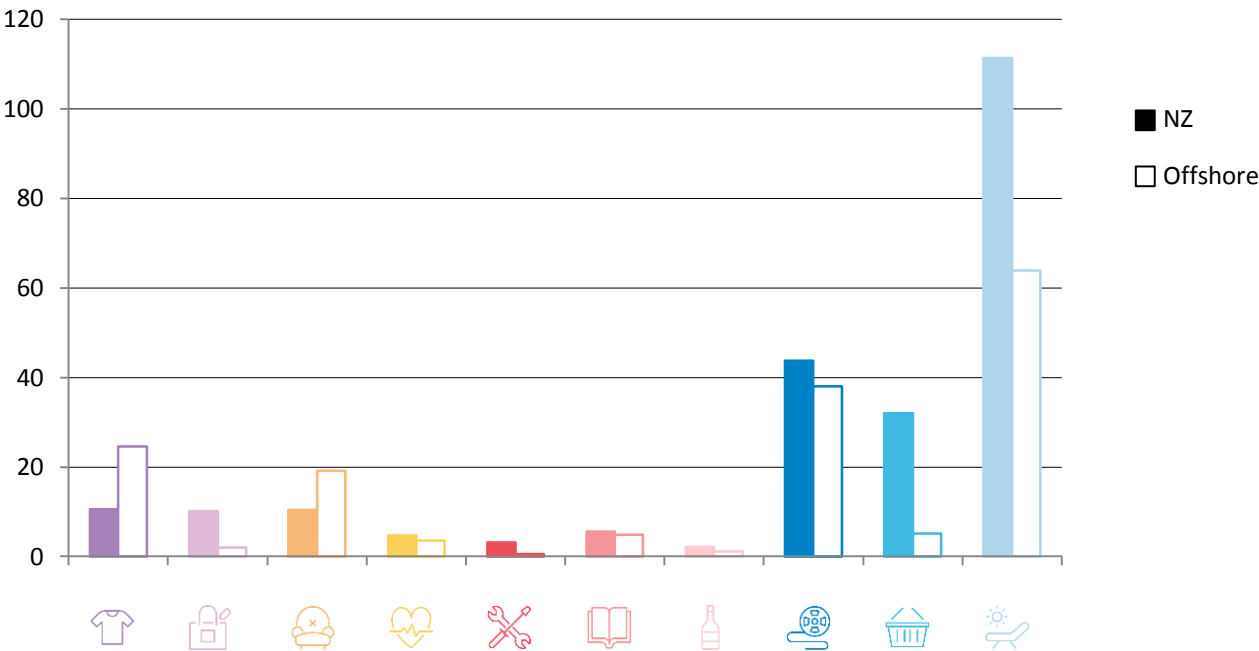


Online retail market summary New Zealand vs Offshore merchants

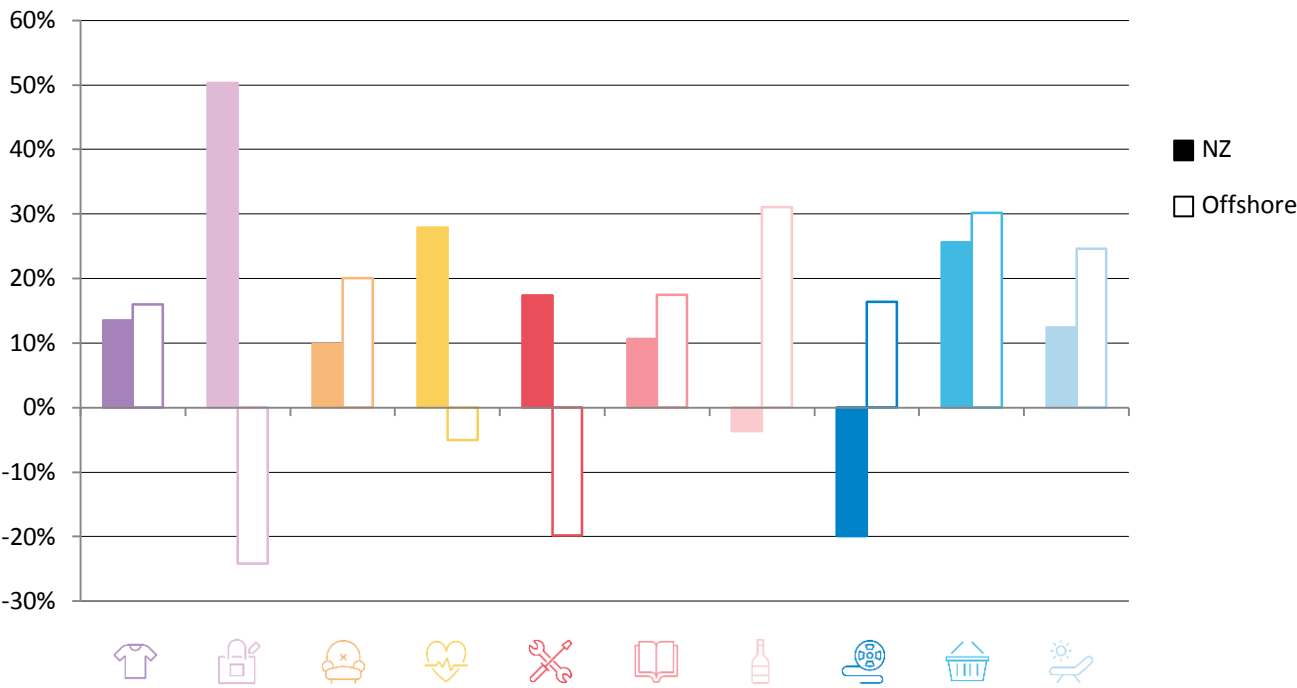
November 2017

Retailer Category	Month Total \$M		% Change vs Prior Month		% Change vs Last Year	
	NZ	Offshore	NZ	Offshore	NZ	Offshore
 Clothing & Footwear	10.6	24.6	28.3%	29.7%	13.5%	16.0%
 Department Stores	10.2	2.1	61.3%	32.3%	50.3%	-24.2%
 Furniture, Appliances & Electronics	10.4	19.2	61.2%	-1.5%	9.9%	20.1%
 Health Goods & Services	4.7	3.6	17.3%	-16.7%	27.8%	-5.0%
 Home & Building Supplies	3.2	0.6	43.0%	-22.4%	17.4%	-19.8%
 Books & Stationery Stores	5.5	4.8	35.1%	31.8%	10.6%	17.5%
 Liquor Stores	2.1	1.1	15.3%	28.2%	-3.7%	31.1%
 Recreation & Entertainment	43.8	38.0	-6.4%	-8.8%	-19.9%	16.4%
 Supermarkets & Food Retailers	32.0	5.1	7.3%	17.6%	25.6%	30.1%
 Travel & Accommodation	111.3	63.8	6.4%	-8.1%	12.4%	24.6%
 Total Retail Spend	233.8	162.9	9.0%	-1.3%	7.1%	18.8%

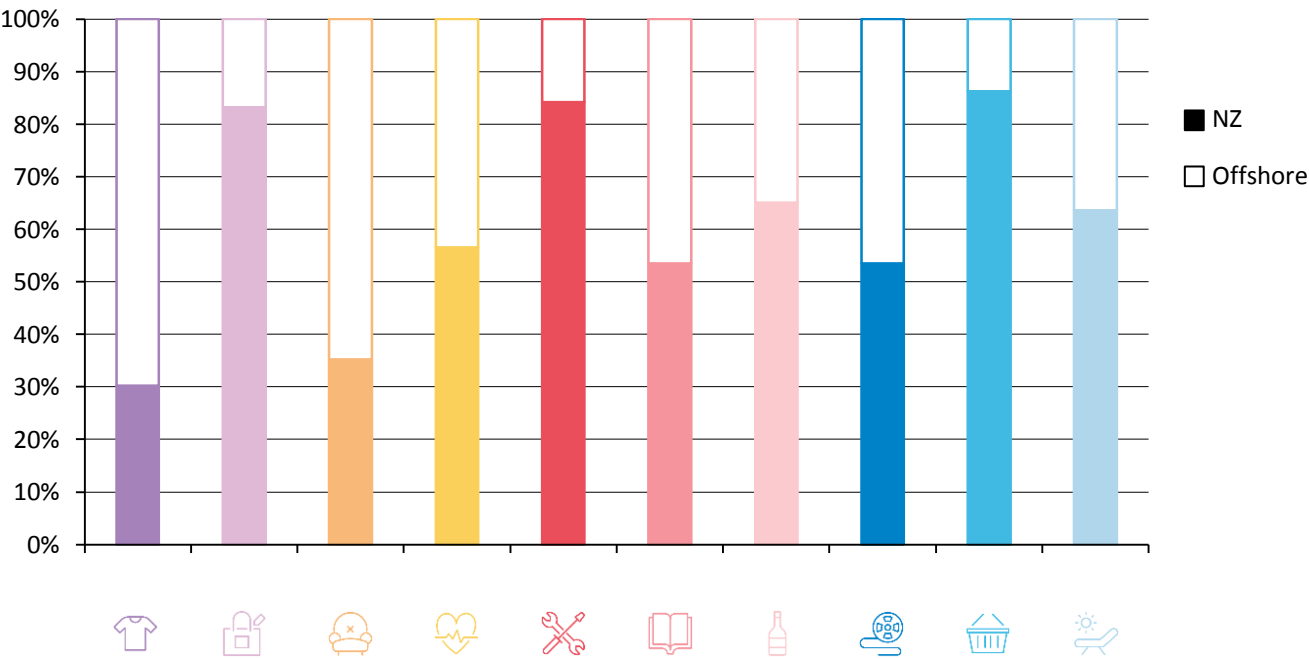
Online retailer total revenue by category (\$M)



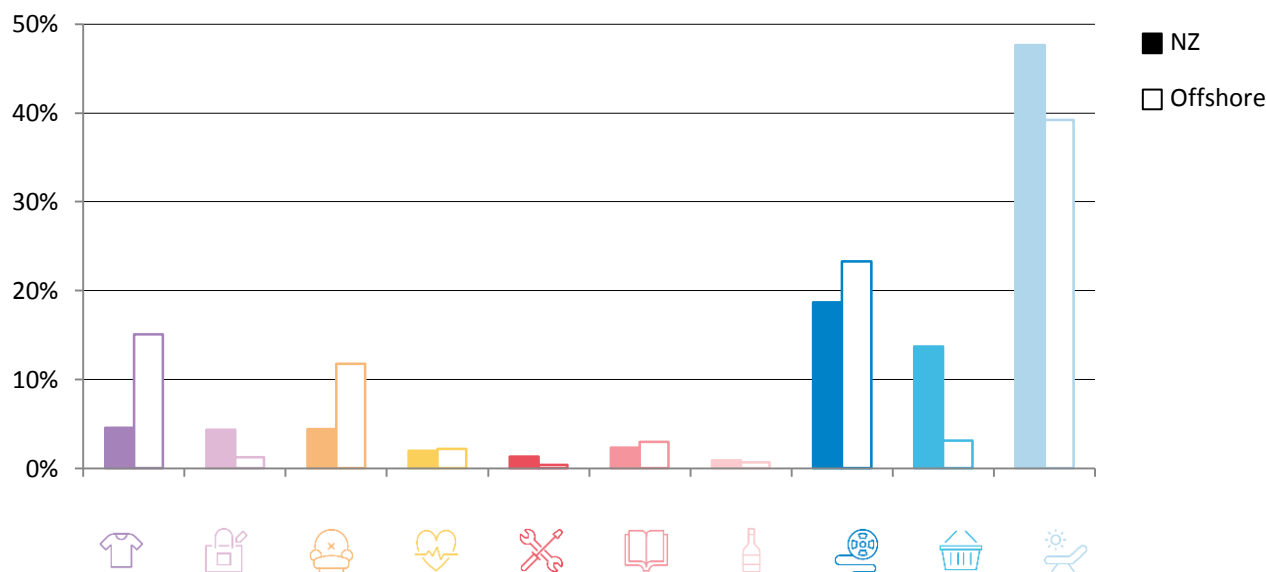
Monthly online revenue change year-on-year



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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