
















## Value of electronic card transactions within retail categories

Period ending 28/12/2016

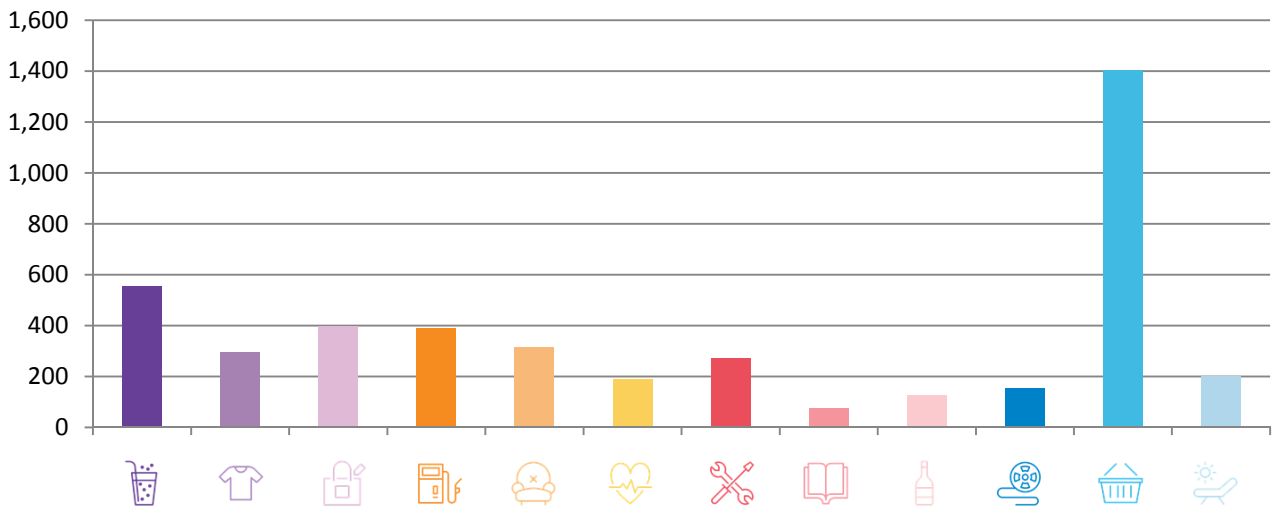
Total retail spend in New Zealand for the 28 days ending 28 December 2016 was \$4.4 billion. As is expected with Christmas spending, this is a large increase (18.3%) compared to the previous month however spending also increased 4.4% compared to the same period last year.

Retailers rejoice, spending was up across every category year on year and all but two categories (Recreation & Entertainment, and Travel & Accommodation) month on month. The categories showing the greatest increase in year on year spending were Cafés, Restaurants & Bars (+8.2%), Home & Building Supplies (+8.1%), and Liquor Stores (+7.9%).

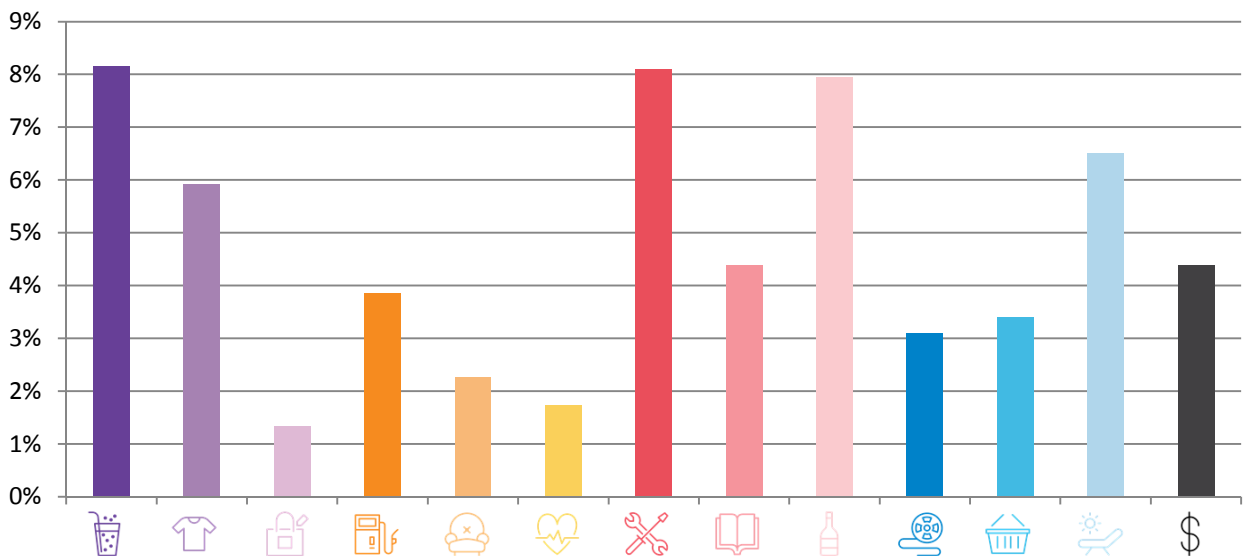
Categories with the greatest increases in month on month spend were Department Stores (+74.0%), Books & Stationery Stores (+53.3%), and Clothing & Footwear (+47.3%).

Retailer Category	Month Total \$M	% Change vs Prior Month	% Change vs Last Year	% Share
 Cafés, Restaurants & Bars	554	10.2%	8.2%	12.7%
 Clothing & Footwear	294	47.3%	5.9%	6.7%
 Department Stores	398	74.0%	1.3%	9.1%
 Fuel & Service Stations	390	10.4%	3.9%	8.9%
 Furniture, Appliances & Electronics	314	38.7%	2.3%	7.2%
 Health Goods & Services	191	2.6%	1.7%	4.4%
 Home & Building Supplies	270	16.5%	8.1%	6.2%
 Books & Stationery Stores	75	53.3%	4.4%	1.7%
 Liquor Stores	128	40.7%	7.9%	2.9%
 Recreation & Entertainment	154	0.0%	3.1%	3.5%
 Supermarkets & Food Retailers	1,402	11.6%	3.4%	32.1%
 Travel & Accommodation	202	-6.5%	6.5%	4.6%
 <b>TOTAL RETAIL SPEND</b>	<b>4,372</b>	<b>18.3%</b>	<b>4.4%</b>	<b>100%</b>

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



## Change vs last year



## Quarterly summary

### December 2016














The total quarterly retail spend for the 91 days ending 28 December 2016 was \$12.6 billion. This is an increase of 14.1% when compared to the previous quarter and an increase of 3.6% when compared to the same period last year.

Thanks to a huge increase in spending in December, Department stores saw the biggest increase (+49.1%) compared to the previous quarter. This was followed by Clothing & Footwear (+30.8%), Furniture, Appliances and Electronics (+27.6%), Home & Building Supplies (+27.5%), and Liquor Stores (+27.4%). Travel & Accommodation was the only category to see a decline quarter on quarter (-3.6%).

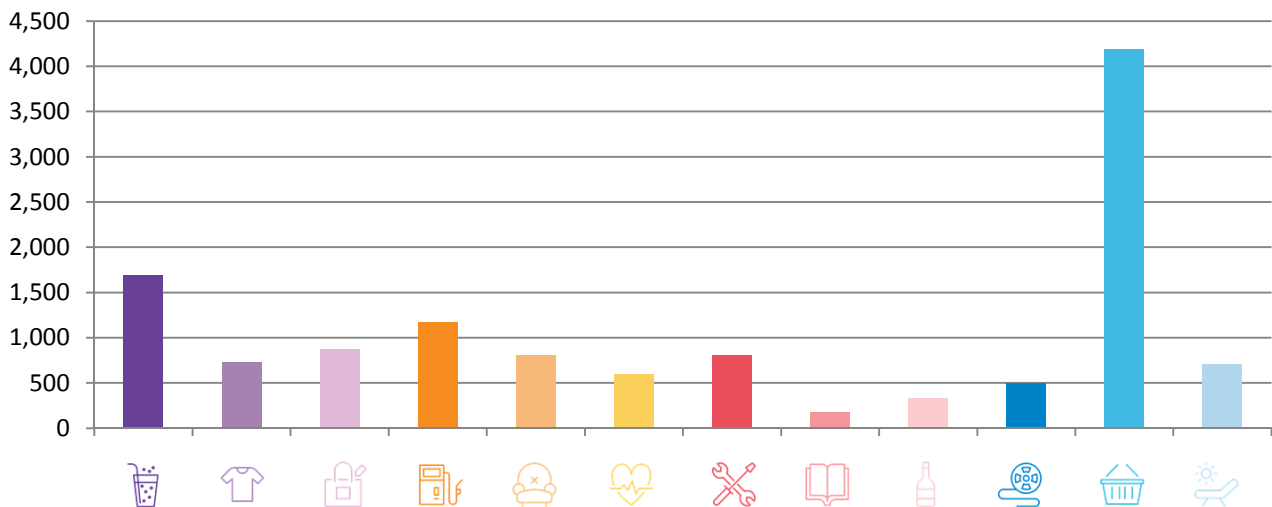
Compared to the same quarter of the previous year spending increased in all but two categories, Department Stores (-0.4%), and Fuel & Service Stations (-0.3%). The greatest year on year increases came from the Recreation & Entertainment (13.8%), and Cafés, Restaurants & Bars (+6.7%) categories.

## Quarterly summary

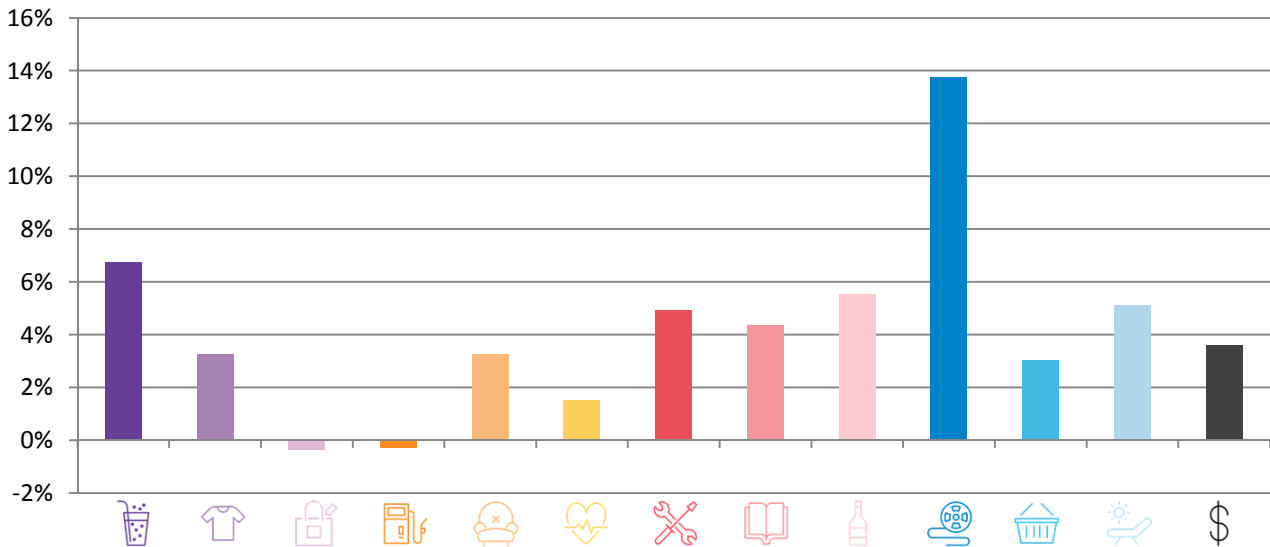
December 2016

Retailer Category	Quarter Total \$M	% Change vs Prior Quarter	% Change vs Last Year	% Share
 Cafés, Restaurants & Bars	1,687	5.3%	6.7%	13.4%
 Clothing & Footwear	731	30.8%	3.3%	5.8%
 Department Stores	876	49.1%	-0.4%	7.0%
 Fuel & Service Stations	1,179	10.0%	-0.3%	9.4%
 Furniture, Appliances & Electronics	812	27.6%	3.2%	6.4%
 Health Goods & Services	598	3.5%	1.5%	4.7%
 Home & Building Supplies	812	27.5%	4.9%	6.4%
 Books & Stationery Stores	178	23.5%	4.3%	1.4%
 Liquor Stores	327	27.4%	5.5%	2.6%
 Recreation & Entertainment	500	12.7%	13.8%	4.0%
 Supermarkets & Food Retailers	4,186	10.4%	3.0%	33.2%
 Travel & Accommodation	710	-3.6%	5.1%	5.6%
 <b>TOTAL RETAIL SPEND</b>	<b>12,595</b>	<b>14.1%</b>	<b>3.6%</b>	<b>100%</b>

## Quarterly spend by category (\$M)



## Change vs last year



## Selected regions of interest

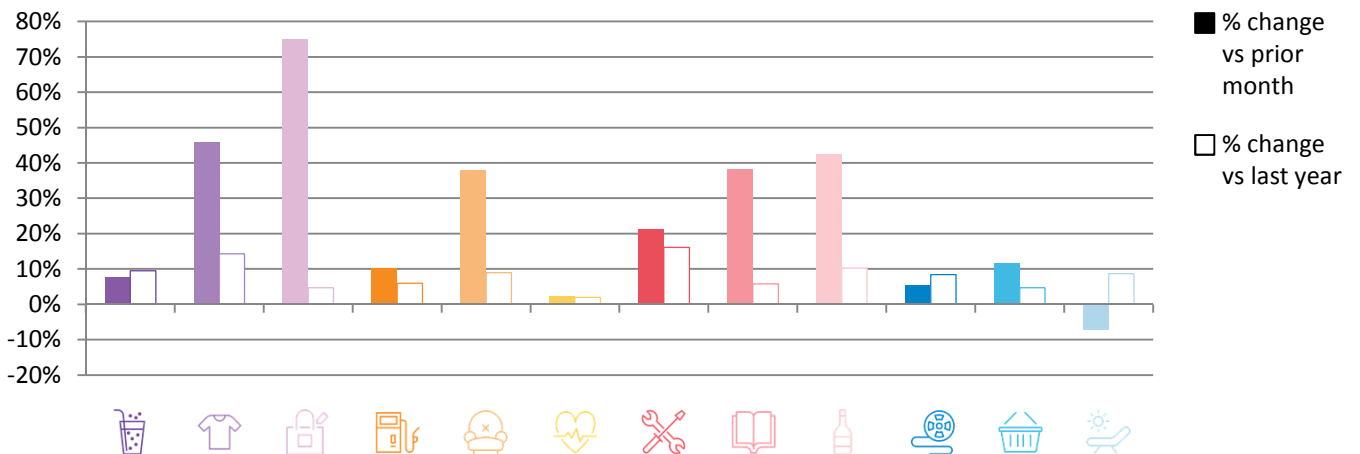
December 2016

### Monthly trends Waikato

The trends in Waikato for December 2016 were very similar to the national trends with year on year increases across the board and increases in all but one category (Travel & Accommodation -7.4%) month on month.

The categories with the greatest increases year on year were Home & Building Supplies (+16.1%), Clothing & Footwear (14.3%), and Liquor Stores (+10.2%).

Similar to national trends, the greatest increases month on month were Department Stores (+75.0%), Clothing & Footwear (+45.8%), and Liquor Stores (+42.7%).



## Monthly trends Gisborne

Spending in Gisborne was variable with large increases and substantial decreases in many categories. Spending increased in ten of twelve categories month on month and seven of twelve categories year on year.

Christmas spending in the small Gisborne region saw increases of over 50% in four categories; Books & Stationery (+81.5%), Department Stores (+67.7%), Furniture, Appliances, and Electronics (+54.3%), and Liquor Stores (+51.9%). As was the trend for December, Travel & Accommodation spending decreased (-13.8%) as did Health Goods & Services spending (-10.5%).

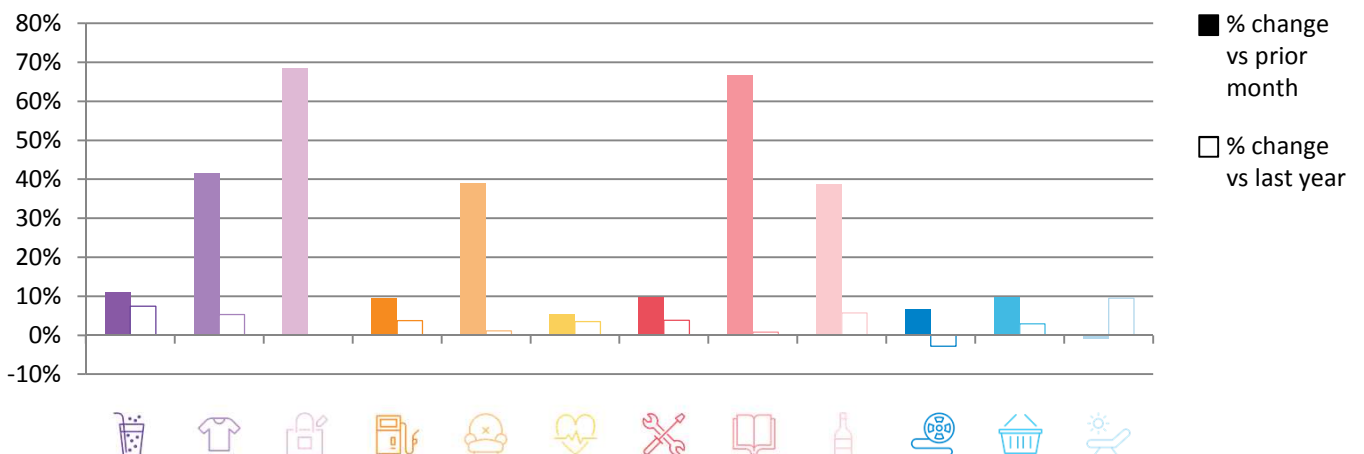
The greatest increase in year on year spending in Gisborne was in Recreation & Entertainment (+16.1%) while the largest decrease was again in Travel & Accommodation (-16.5%).



## Monthly trends Canterbury

Canterbury had a positive month with an overall increase in spend of 3.4% year on year. Month on month spend was up across every category with the exception of Travel & Accommodation which saw a decrease of 1.0%. The greatest month on month increases were in the Department Stores (+68.5%), and Books & Stationery Stores (+66.6%) categories.

Finally some good news for the Travel & Accommodation sector. Spending for the category increased 9.5% year on year followed by Cafés, Restaurants & Bars (+7.4%). Recreation & Entertainment was the only category to decline year on year in Canterbury (-2.8%).



## Going up this month

The greatest increase in year on year spend was Department Stores (+74.0%)

The Waikato region saw the greatest increase in overall spend compared to the same period last year (+7.3%).

**12**

Categories up

**15**

Regions up

## Going down this month

There were no categories with decreases in year on year spend.

Again, Taranaki was the only region where overall spend decreased compared to the same period last year (-0.8%).

**0**

Categories down

**1**

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 retail market summary

### Period ending 28/12/2016

Total retail spend in New Zealand for the 28 days ending 28 December 2016 was \$310 million. This represents an increase of 15.4% year on year but a decrease of 9.1% against the previous month.

Online spending was up across every category year on year. The categories showing the greatest increases were Department Stores (+50.3%), Books & Stationery (+49.9%), and Furniture, Appliances and Electronics (+38.3%).

Categories with the greatest increases in month on month spend were Department Stores (+23.9%) and Liquor Stores (+19.5%). Compared to the previous month, Recreation & Entertainment (-27.7%), Travel & Accommodation (-11.4%), Clothing & Footwear (-10.7%), and Supermarkets and Food Retailers (-5.5%) decreased in spend.

Online Retailer Category	Month Total \$M	% Change vs Prior Month	% Change vs Last Year	% Share
 Clothing & Footwear	26.6	-10.7%	17.3%	8.6%
 Department Stores	17.8	23.9%	50.3%	5.7%
 Furniture/Appliances/Electronics	30.0	13.5%	38.3%	9.7%
 Health Goods & Services	7.8	10.0%	3.0%	2.5%
 Home & Building Supplies	3.9	6.6%	2.5%	1.2%
 Books & Stationery Stores	9.8	11.7%	49.9%	3.2%
 Liquor Stores	3.5	19.5%	25.3%	1.1%
 Recreation & Entertainment	49.2	-27.7%	4.3%	15.9%
 Supermarkets/Food Retailers	28.8	-5.5%	15.5%	9.3%
 Travel & Accommodation	132.6	-11.4%	10.9%	42.8%
 <b>Total Online Retail Spend</b>	<b>310</b>	<b>-9.1%</b>	<b>15.4%</b>	<b>100%</b>

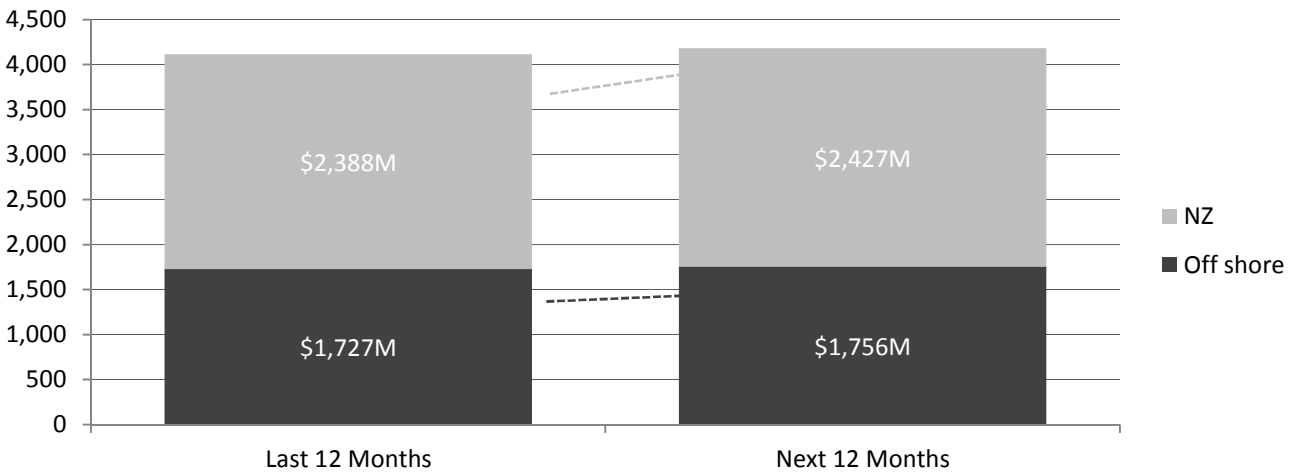
## Online: New Zealand vs Off Shore

New Zealand merchants accounted for 56.9% of online spend representing a 14.9% decrease compared to the previous month but a 12.9% increase against the same period last year.

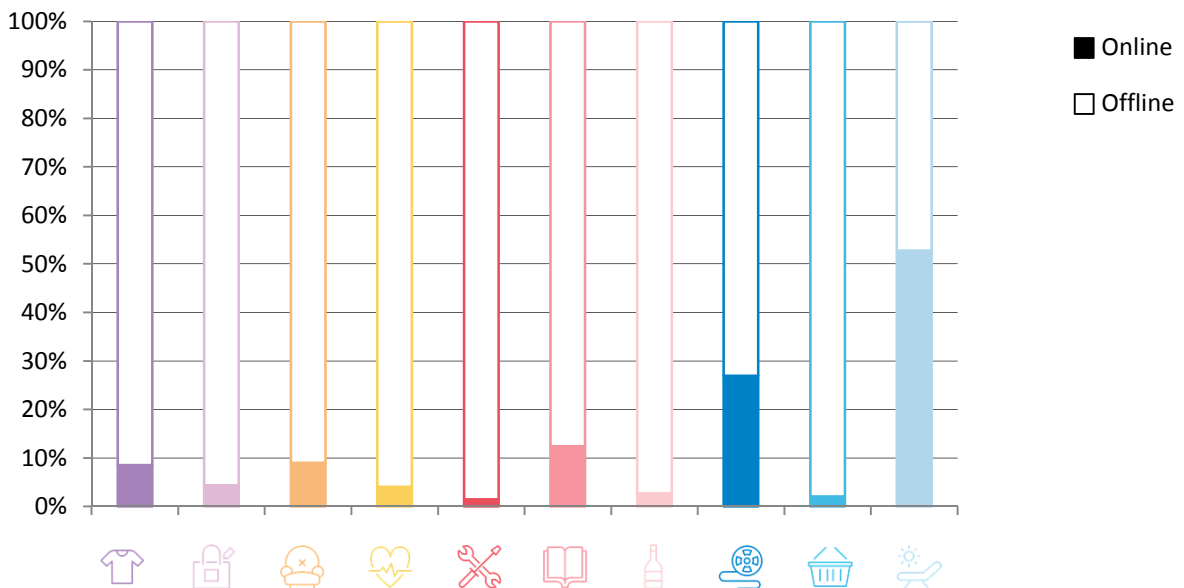
For New Zealand merchants the greatest increases in spend compared to the previous month were in Furniture, Appliances, and Electronics (+32.1%) and Department Stores (+28.4%). However, there were also categories that experienced large decreases such as Recreation & Entertainment (-50.9%) and Travel & Accommodation (-15.6%). Compared to the previous year, spend decreased 6.0% in Home & Building Supplies and 25.6% in Recreation & Entertainment but increased in every other category. The category with the greatest year on year increase was Books & Stationery (+139.7%).

Spend with Off Shore merchants decreased by 0.1% when compared to the previous month and increased 18.9% compared to the same period last year. Spend with Off Shore merchants increased the most in Liquor Stores (+45.9%), month on month and Department Stores (+106.6%) year on year.

## Projected total online spend (\$M)














## % share of category spend



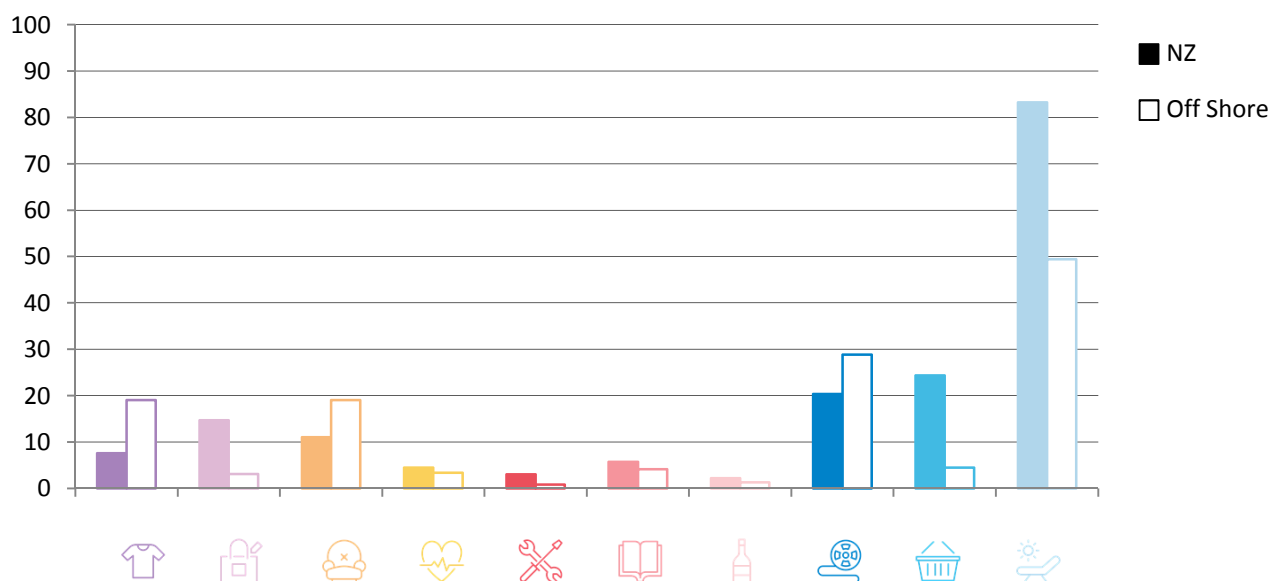


## Online retail market summary New Zealand vs Off Shore merchants

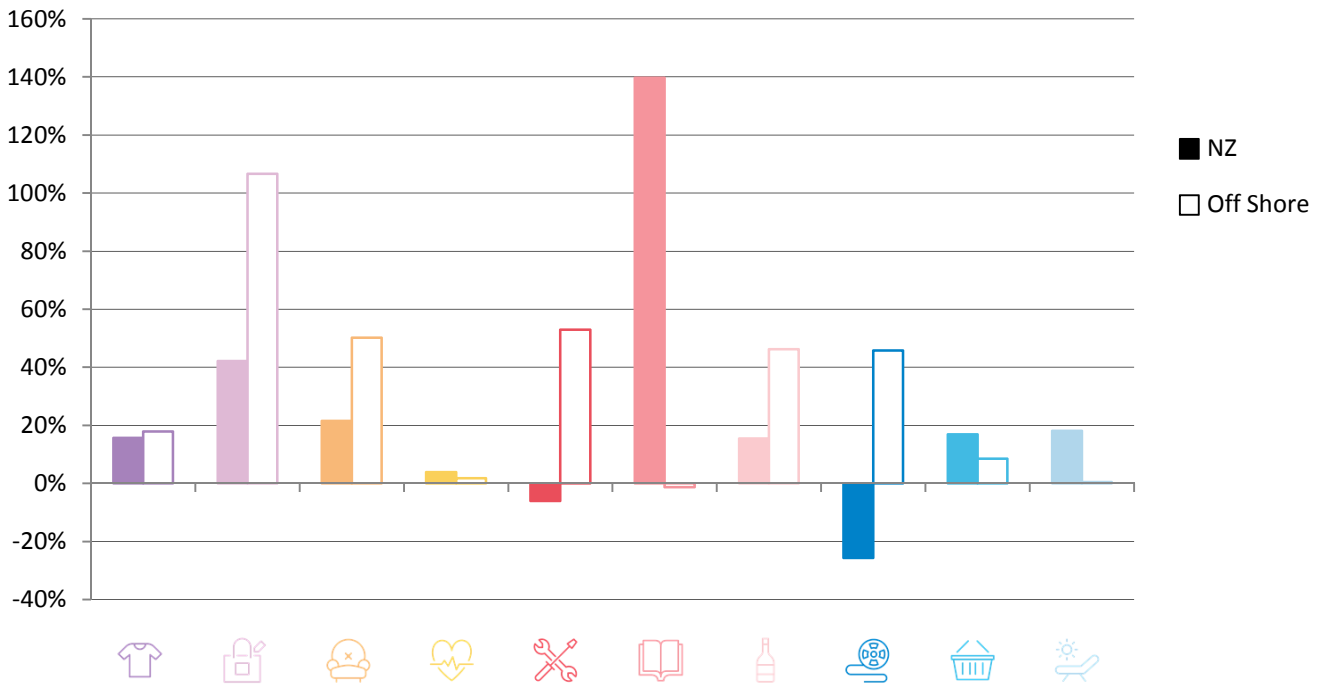
December 2016

Retailer Category	Month Total \$M		% Change vs Prior Month		% Change vs Last Year	
	NZ	Off Shore	NZ	Off Shore	NZ	Off Shore
 Clothing & Footwear	7.5	19.0	-7.7%	-11.8%	15.7%	17.9%
 Department Stores	14.7	3.1	28.4%	6.5%	42.1%	106.6%
 Furniture/Appliances/Electronics	11.0	19.0	32.1%	5.0%	21.6%	50.2%
 Health Goods & Services	4.5	3.4	22.4%	-3.0%	3.9%	1.8%
 Home & Building Supplies	3.0	0.8	6.3%	7.8%	-6.0%	53.0%
 Books & Stationery Stores	5.7	4.1	24.4%	-2.1%	139.7%	-1.2%
 Liquor Stores	2.2	1.3	7.8%	45.9%	15.4%	46.2%
 Recreation & Entertainment	20.3	28.8	-50.9%	8.4%	-25.6%	45.7%
 Supermarkets/Food Retailers	24.3	4.5	-8.1%	11.4%	16.9%	8.5%
 Travel & Accommodation	83.2	49.4	-15.6%	-3.3%	18.1%	0.5%
 <b>Total Retail Spend</b>	<b>176.5</b>	<b>133.5</b>	<b>-14.9%</b>	<b>-0.1%</b>	<b>12.9%</b>	<b>18.9%</b>

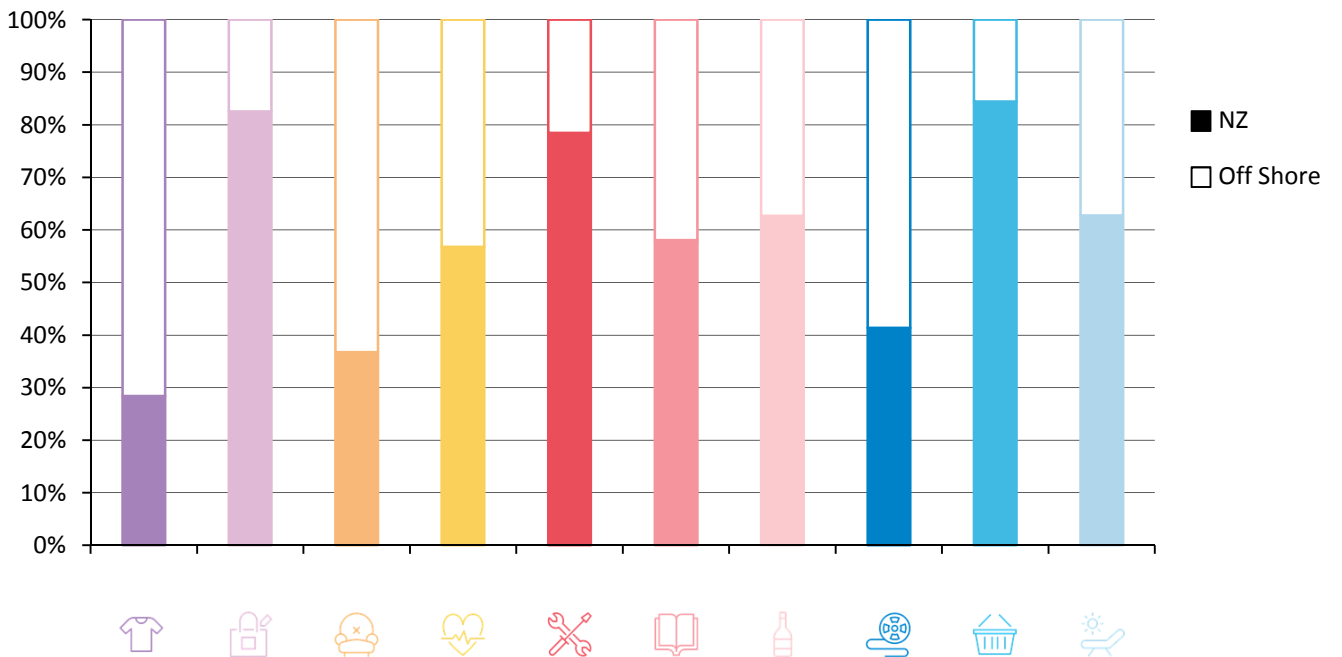
## Online retailer total revenue by category (\$M)



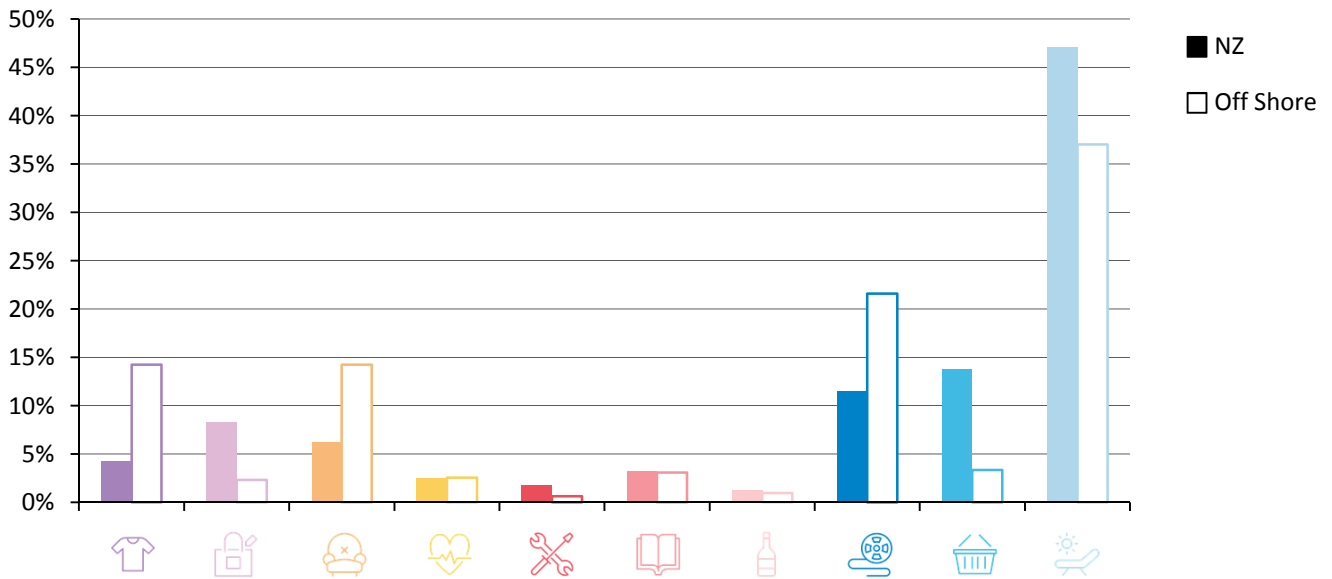
## Monthly online revenue change YOY



## 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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+64 9 303 2300  
0800 DATAMINE 0800 328 264

retailwatch@datamine.com  
www.datamine.com