



## Value of electronic card transactions within retail categories

Period ending 28/03/2017

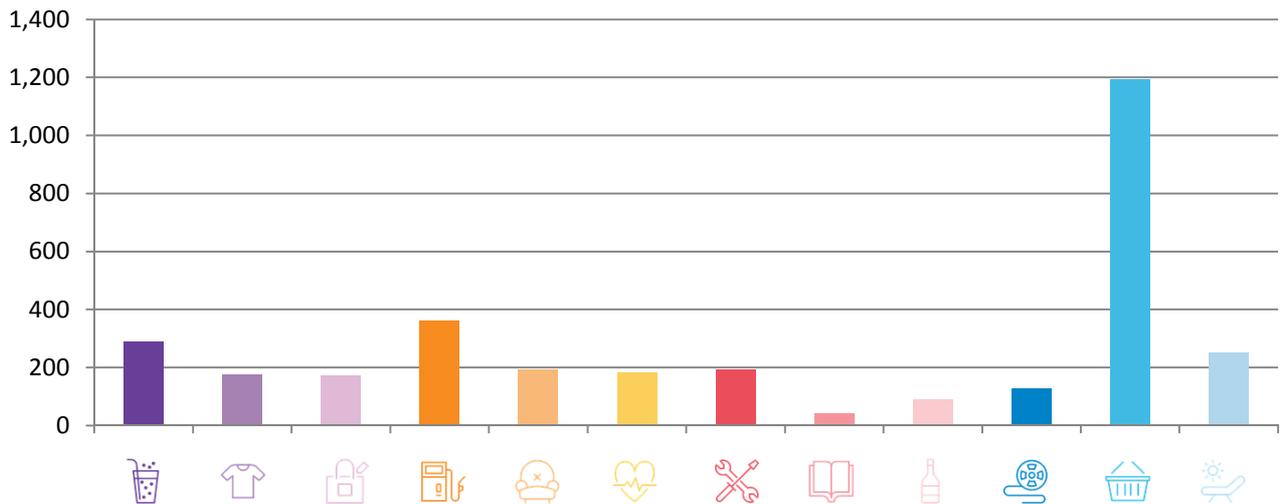
Total retail spend in New Zealand for the 28 days ending 28 March 2017 was \$3.3 billion. This is a decrease of -2.6% compared to February 2017 and an increase of 1.0% when compared to the same period last year.

Spending was up in eight of the twelve categories year on year. The categories showing the greatest increase in spend were Health Goods & Services (+8.8%) and Fuel & Service Stations (4.9%) while Department Stores saw the greatest decrease in spend (-6.3%).

Compared to the previous month, all but two categories experienced decreases in spend. The largest decrease was seen in Books & Stationery Stores (-10.8%), followed by Travel & Accommodation (-7.3%) and Liquor Stores (-5.9%). The Clothing & Footwear category saw the largest increase in spend by 9.8%.

Retailer Category	Month Total \$M	% Change vs Prior Month	% Change vs Last Year	% Share
 Cafés, Restaurants & Bars	290	-1.4%	1.7%	8.9%
 Clothing & Footwear	177	9.8%	1.4%	5.4%
 Department Stores	171	-0.4%	-6.3%	5.2%
 Fuel & Service Stations	362	-4.7%	4.9%	11.1%
 Furniture, Appliances & Electronics	193	-0.4%	2.2%	5.9%
 Health Goods & Services	182	2.7%	8.8%	5.6%
 Home & Building Supplies	194	-4.6%	2.1%	5.9%
 Books & Stationery Stores	42	-10.8%	-2.6%	1.3%
 Liquor Stores	89	-5.9%	0.8%	2.7%
 Recreation & Entertainment	126	-2.6%	-1.9%	3.9%
 Supermarkets & Food Retailers	1,195	-3.3%	-0.4%	36.5%
 Travel & Accommodation	250	-7.3%	2.1%	7.7%
 <b>TOTAL RETAIL SPEND</b>	<b>3,270</b>	<b>-2.6%</b>	<b>1.0%</b>	<b>100%</b>

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



## Change vs last year



## Quarterly summary

### March 2017

The total quarterly retail spend for the 91 days ending 28 March 2017 was \$10.8 billion. This is a decrease of -9.2% when compared to the previous quarter, and an increase of 2.1% when compared to the same period last year.

When compared to the previous quarter, spend increased the most in the Travel & Accommodation (+20%) category. Ten of the twelve categories experienced decreases in spend when compared to the previous quarter. The largest decreases in spend were seen in the Department Stores (-33.4%), Clothing & Footwear (-22.7%) and Furniture, Appliances & Electronics (-21.3%) categories.

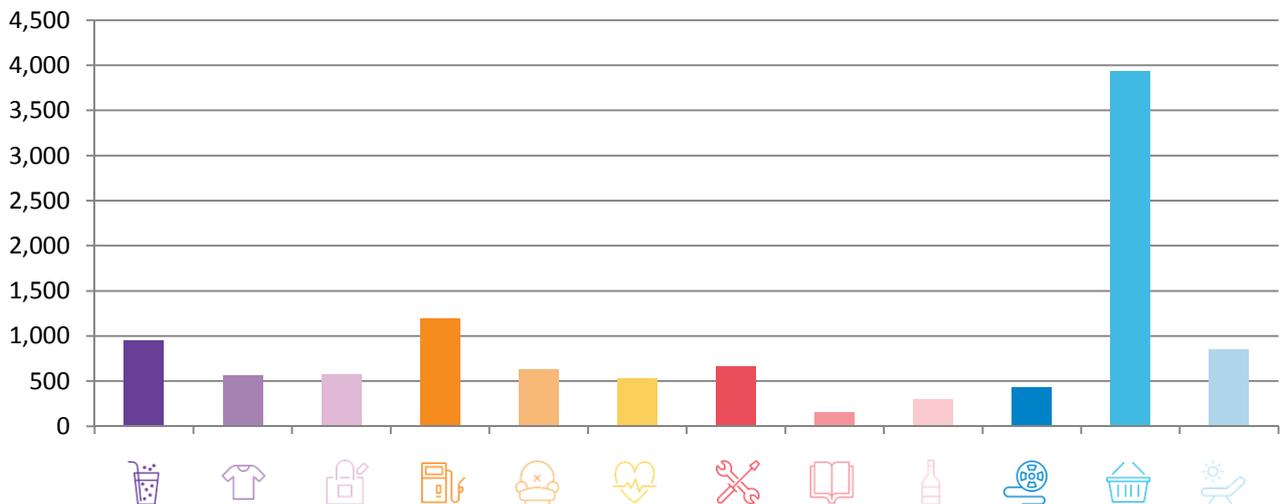
Compared to the same quarter of the previous year, spending increased in all but three categories. The greatest year on year increases came from Fuel & Service Stations (+8.3%) and Home & Building Supplies (+4.7%), whilst Department Stores (-3.0%) saw the largest decrease.

## Quarterly summary

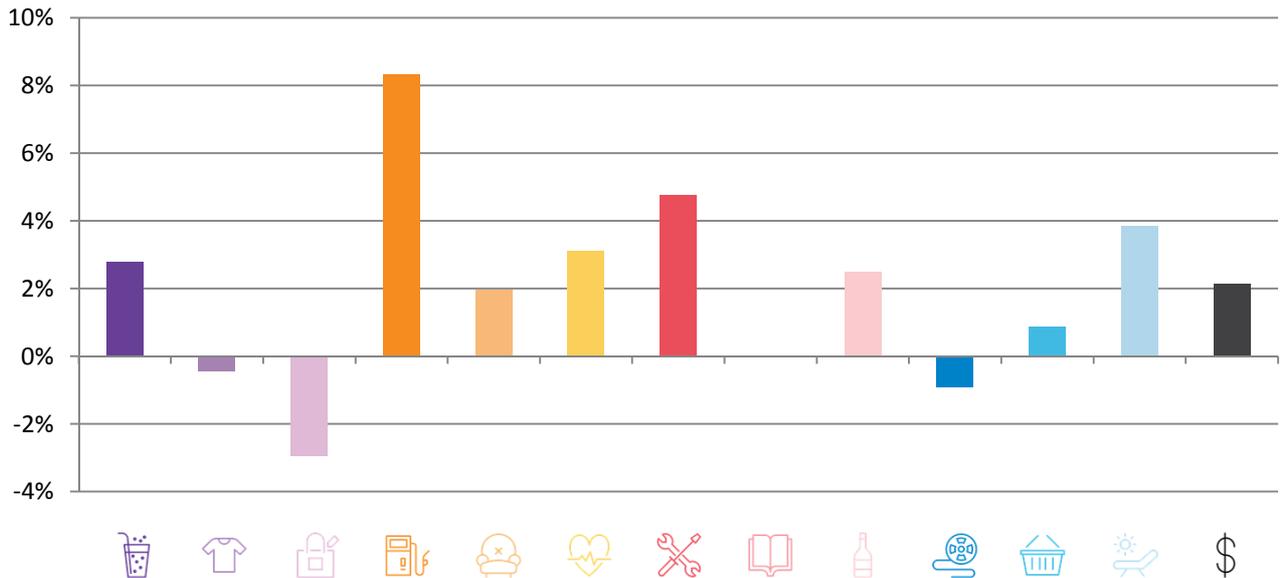
March 2017

Retailer Category	Quarter Total \$M	% Change vs Prior Quarter	% Change vs Last Year	% Share
 Cafés, Restaurants & Bars	947	-3.7%	2.8%	8.8%
 Clothing & Footwear	564	-22.7%	-0.4%	5.2%
 Department Stores	578	-33.4%	-3.0%	5.4%
 Fuel & Service Stations	1,195	1.7%	8.3%	11.1%
 Furniture, Appliances & Electronics	633	-21.3%	1.9%	5.9%
 Health Goods & Services	527	-12.3%	3.1%	4.9%
 Home & Building Supplies	665	-17.6%	4.7%	6.2%
 Books & Stationery Stores	151	-15.2%	0.0%	1.4%
 Liquor Stores	303	-10.9%	2.5%	2.8%
 Recreation & Entertainment	431	-13.5%	-0.9%	4.0%
 Supermarkets & Food Retailers	3,939	-5.7%	0.9%	36.5%
 Travel & Accommodation	851	20.0%	3.9%	7.9%
 <b>TOTAL RETAIL SPEND</b>	<b>10,784</b>	<b>-9.2%</b>	<b>2.1%</b>	<b>100%</b>

## Quarterly spend by category (\$M)



## Change vs last year



## Selected regions of interest

March 2017

### Monthly trends Auckland

Spending in Auckland increased in seven of the twelve categories compared to March last year. The greatest increases in spend were seen in the Health Goods & Services (+9.8%) and Fuel & Service Station (+4.7%) categories year on year. The biggest decrease in spend was seen in the Department Stores category, decreasing by 6.0%.

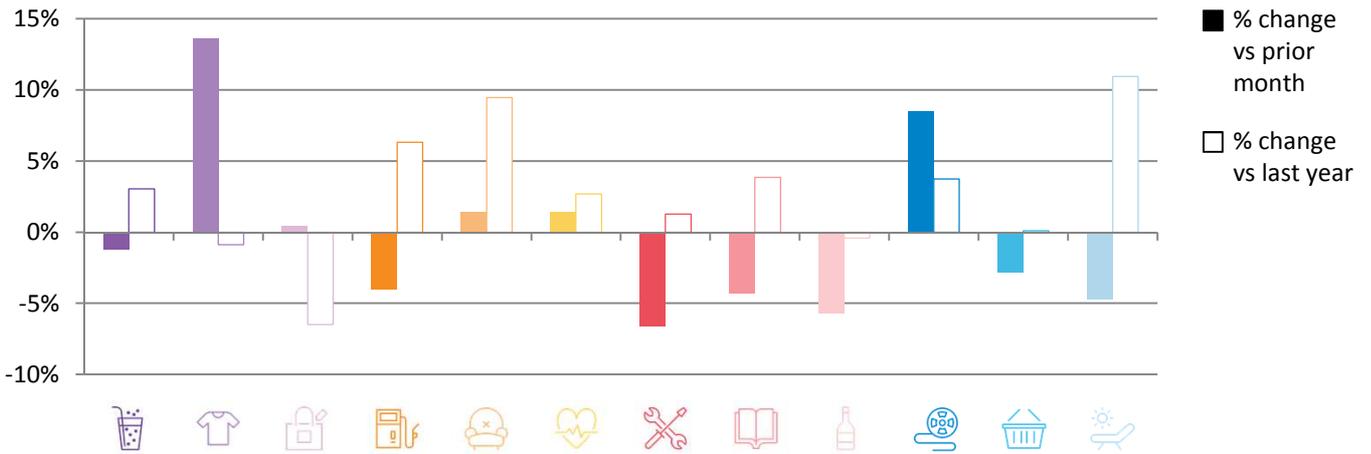
Compared to the previous month, just two of the twelve categories experienced increases in spend. Clothing & Footwear had the largest increase in spend, increasing by 5.7%. The greatest decreases in spend were seen in the Travel & Accommodation (-8.8%), Books & Stationary Stores (-7.9%) and Home & Building Supplies (-5.9%) categories.



### Monthly trends Wellington

Spending in Wellington was up in all but three categories year on year, with the decreases in spend being seen in Department Stores (-6.5%), Clothing & Footwear (-0.9%) and Liquor Stores (-0.4%) categories. There were large increases in spending when compared to March 2016. This was led by the Travel & Accommodation (+11.0%) category, followed by Furniture, Appliances & Electronics (+9.5%) and Fuel & Service Stations (+6.3%).

Spending increased in five of the twelve categories when compared to the previous month. The greatest increase was seen in the Clothing & Footwear category (+13.6%) and the largest decreases in spend were seen in the Home & Building Supplies (-6.7%) and Liquor Stores (-5.7%) categories.



### Monthly trends Waikato

Retail spend in the Waikato region was up in eight of the twelve categories compared to March 2016. The largest increase in spend came from Home & Building Supplies (+9.2%), while the greatest decrease in spend was seen in the Department Stores (-7.9%) category.

Month on month spend was down in ten categories, with the Books & Stationary Stores (-15.3%) category having the largest decrease. This was followed by decreases in the Recreation and Entertainment (-9.2%) and Liquor Stores (-6.8%) categories. Clothing & Footwear (+6.8%) experienced the greatest increase in spend compared to February 2017.



## ↑ Going up this month

The greatest increase in spending this month was seen in the Clothing & Footwear category, up 9.8%.

No regions experienced any increases in spend when compared to February 2017.

2

Categories up

0

Regions up

## ↓ Going down this month

Twelve categories were down when compared to February 2017. The Books & Stationary Stores category had the greatest decrease by 10.8%.

All regions experienced decreases in spend this month. The Nelson region saw the largest decrease in spend by -5.1%.

10

Categories down

16

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

While every effort has been made to ensure the accuracy of Retailwatch, Datamine is not responsible for, and expressly disclaims all liability for, damages of any kind arising out of use, reference to, or reliance on any information contained in Retailwatch.



## Online retail market summary

Period ending 28/03/2017

Total online retail spend in New Zealand for the 28 days ending 28 March 2017 was \$349 million. This represents an increase of 15.2% year on year and a decrease of 1.6% against the previous month.

Online spending was up across all ten categories year on year. Supermarkets & Food Retailers saw the largest increase (+33.8%), followed by Furniture, Appliances & Electronics (+31.0%) and Health Goods & Services (+28.8%).

Compared to the previous month, five of the ten categories experienced decreases. The greatest decrease in spend was seen in Liquor Stores (-17.4%), followed by Home & Building Supplies (-16.7%) and Books & Stationery Stores (-8.5%). Compared to February 2017, the largest increases were in the Clothing & Footwear (+5.6%) and Health Goods & Services (+5.3%) categories.

Online Retailer Category	Month Total \$M	% Change vs Prior Month	% Change vs Last Year	% Share
 Clothing & Footwear	22.7	5.6%	17.8%	6.5
 Department Stores	9.2	0.9%	27.3%	2.6
 Furniture, Appliances & Electronics	24.0	-2.8%	31.0%	6.9
 Health Goods & Services	8.1	5.3%	28.8%	2.33
 Home & Building Supplies	3.0	-16.7%	15.2%	0.87
 Books & Stationery Stores	7.3	-8.5%	5.2%	2.08
 Liquor Stores	1.8	-17.4%	23.5%	0.52
 Recreation & Entertainment	60.6	4.9%	16.5%	17.4
 Supermarkets & Food Retailers	29.4	-1.5%	33.8%	8.4
 Travel & Accommodation	183.1	2.0%	9.5%	52.4
 <b>Total Online Retail Spend</b>	<b>349.2</b>	<b>1.6%</b>	<b>15.2%</b>	<b>100.0</b>

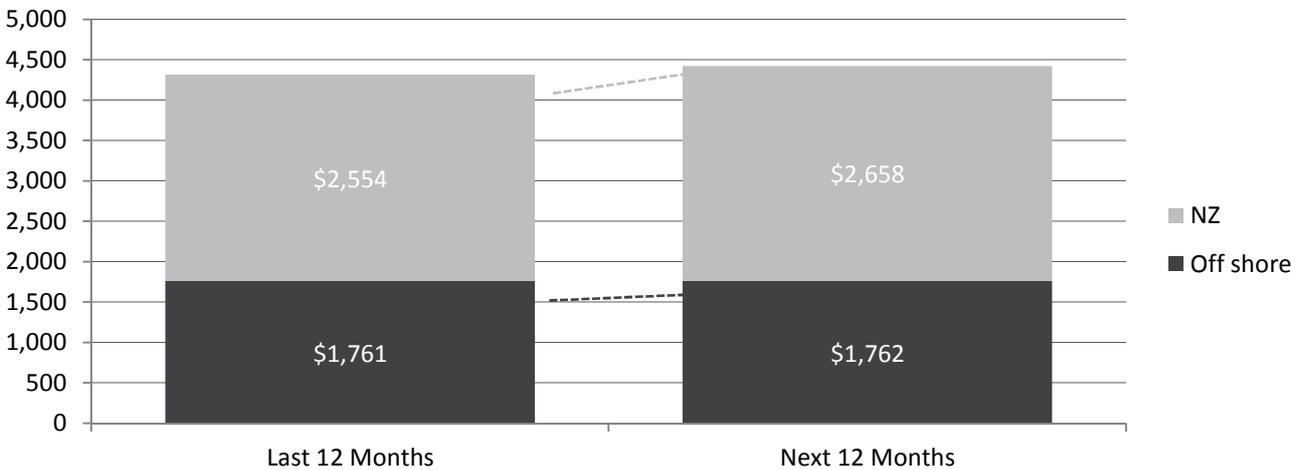
## Online: New Zealand vs Off Shore

New Zealand merchants accounted for 59.3% of online spend for the month of March. There was no change in share of online spend compared to the previous month, although there was a 16.8% increase against the same period last year.

For New Zealand merchants, six of the ten categories saw decreases in spend compared to the previous month. The greatest monthly decrease in spend was seen in Home & Building Supplies (-22.4%), followed by Liquor Stores (-16.6%). The largest monthly increase in spend was seen in the Recreation & Entertainment category (9.2%). Compared to the previous year, none of the categories experienced any decreases in spend. The Supermarkets & Food Retailers led with a 35.8% increase in spend year on year.

Spend with Off Shore merchants increased by 3.9% when compared to the previous month and increased by 12.8% when compared to the same period last year. Spend with Off Shore merchants increased the most in Health Goods & Services (12.3%) for month on month spend, whereas Home & Building Supplies (66.5%) saw the largest increase year on year.

## Projected total online spend (\$M)



## % share of category spend

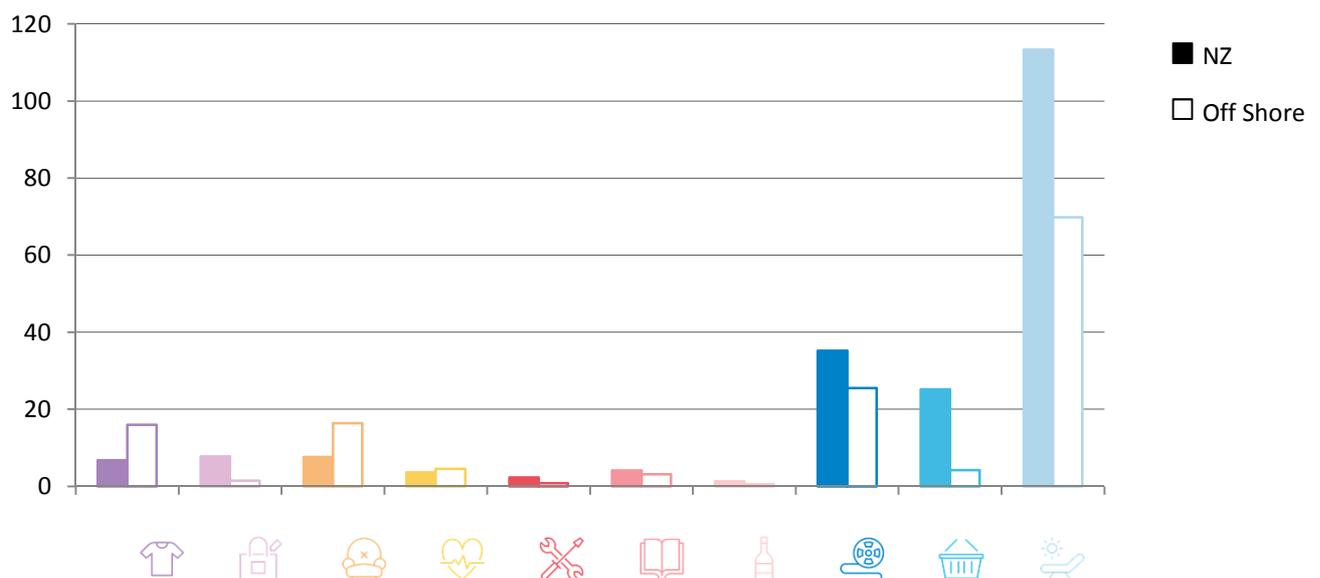


## Online retail market summary New Zealand vs Off Shore merchants

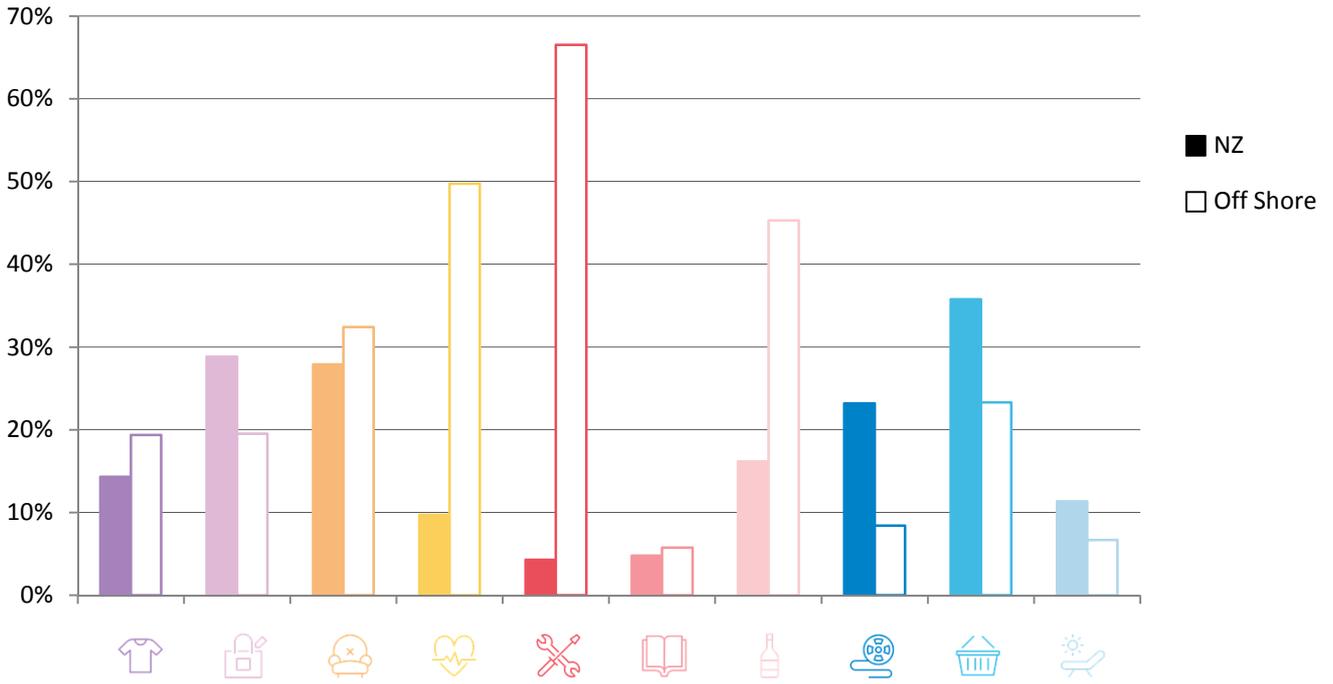
March 2017

Retailer Category	Month Total \$M		% Change vs Prior Month		% Change vs Last Year	
	NZ	Off Shore	NZ	Off Shore	NZ	Off Shore
 Clothing & Footwear	6.8	15.9	8.4%	4.5%	14.3%	19.4%
 Department Stores	7.8	1.5	0.6%	2.1%	28.8%	19.5%
 Furniture, Appliances & Electronics	7.6	16.4	1.0%	-4.5%	27.9%	32.4%
 Health Goods & Services	3.6	4.5	-2.3%	12.3%	9.7%	49.7%
 Home & Building Supplies	2.3	0.8	-22.4%	6.8%	4.3%	66.5%
 Books & Stationery Stores	4.1	3.1	-5.8%	-11.9%	4.8%	5.8%
 Liquor Stores	1.3	0.5	-16.6%	-19.2%	16.2%	45.3%
 Recreation & Entertainment	35.2	25.5	9.2%	-0.4%	23.2%	8.4%
 Supermarkets & Food Retailers	25.2	4.2	-2.0%	1.7%	35.8%	23.3%
 Travel & Accommodation	113.3	69.8	-1.6%	8.5%	11.4%	6.7%
 <b>Total Retail Spend</b>	<b>207.0</b>	<b>142.2</b>	<b>0.0%</b>	<b>3.9%</b>	<b>16.8%</b>	<b>12.8%</b>

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



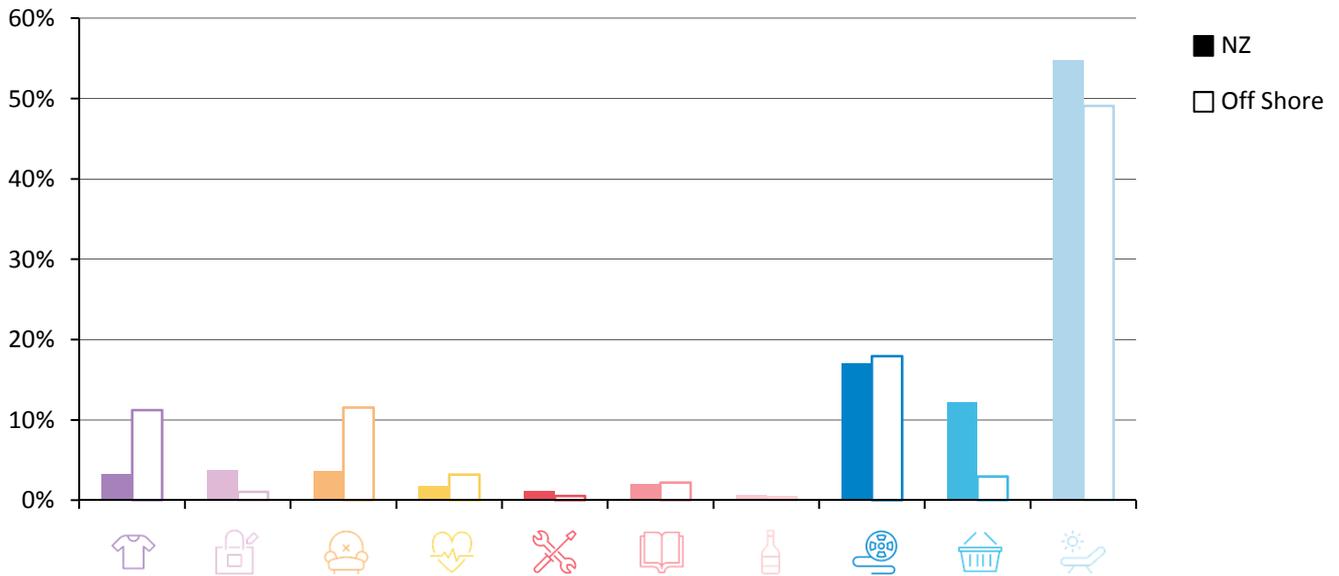
## Monthly online revenue change YOY



## 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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