



Retailwatch














Value of electronic card transactions within retail categories

Period ending 28/05/2017

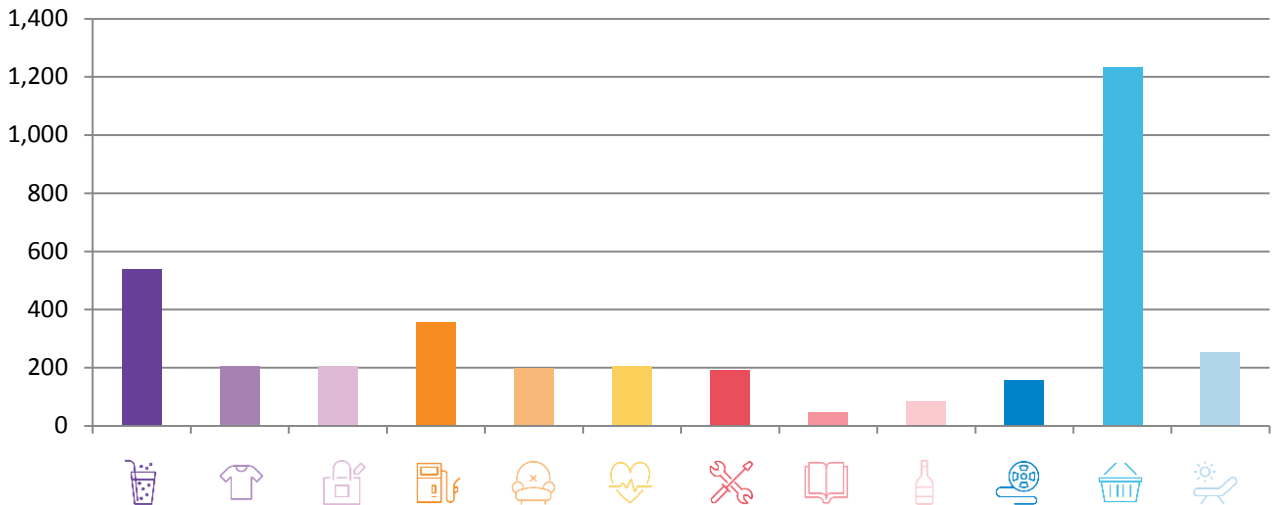
Total retail spend in New Zealand for the 28 days ending 28 May 2017 was \$3.7 billion. This was a decrease of 0.2% compared to April and an increase of 4.3% when compared to the same period last year.

Spending was up in all but one of the twelve categories year on year, with the Books & Stationery Stores category exhibiting a decrease of 3.7%.

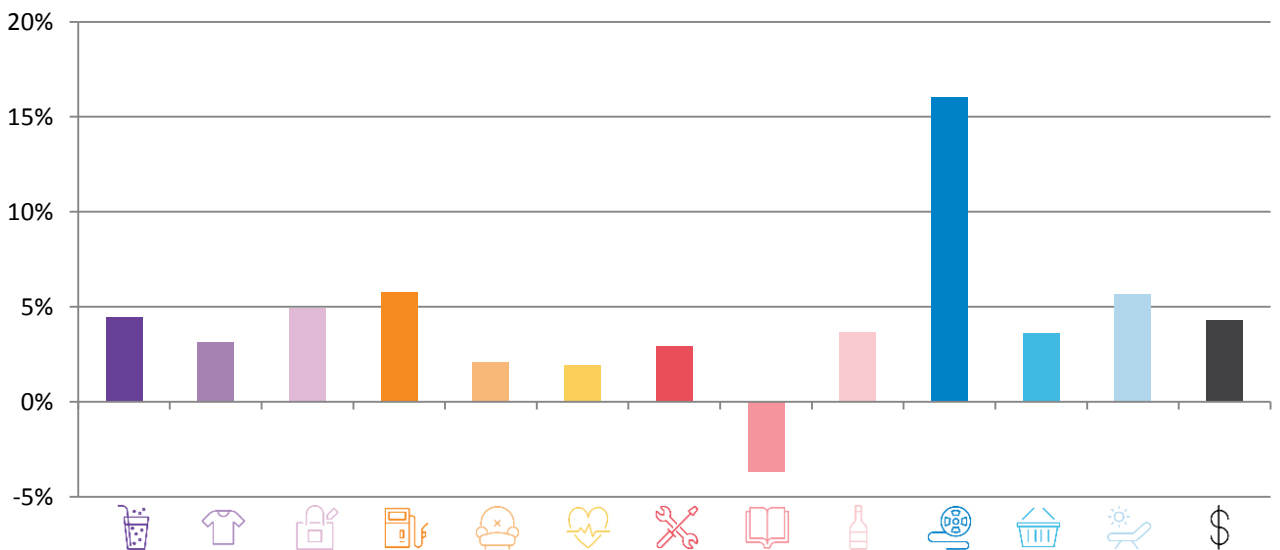
Compared to April, six categories experienced decreases in spend. The largest decrease was seen in Home & Building Supplies (-6.4%), followed by Liquor Stores (-5.1%), and Fuel & Service Stations (-3.4%). Despite the year on year decrease, Books & Stationery Stores saw the largest month on month increase (+12.4%).

Retailer Category	Month Total \$M	% Change vs Prior Month	% Change vs Last Year	% Share
 Cafés, Restaurants & Bars	538	-1.2%	4.5%	14.7%
 Clothing & Footwear	204	2.7%	3.1%	5.6%
 Department Stores	206	2.0%	4.9%	5.6%
 Fuel & Service Stations	355	-3.4%	5.8%	9.7%
 Furniture, Appliances & Electronics	196	1.1%	2.1%	5.3%
 Health Goods & Services	206	12.5%	1.9%	5.6%
 Home & Building Supplies	192	-6.4%	2.9%	5.2%
 Books & Stationery Stores	45	12.4%	-3.7%	1.2%
 Liquor Stores	86	-5.1%	3.6%	2.3%
 Recreation & Entertainment	157	4.1%	16.0%	4.3%
 Supermarkets & Food Retailers	1,231	-1.2%	3.6%	33.5%
 Travel & Accommodation	254	0.0%	5.6%	6.9%
 TOTAL RETAIL SPEND	3,671	-0.2%	4.3%	100%

Monthly retail spend by category (\$M)



Change vs last year



Quarterly summary

May 2017













The total quarterly retail spend for the 91 days ending 28 May 2017 was \$11.8 billion. This was a decrease of 5.8% when compared to the previous quarter, and an increase of 2.9% when compared to the same period last year.

All but two of the twelve categories experienced a decrease in spend when compared to the previous quarter. The largest decrease in spending was in the Books & Stationery Stores category (-26.3%), followed by Department Stores (-23.0%). Health Goods & Services (+9.2%) and Travel & Accommodation (+0.9%) saw the only increases in spend.

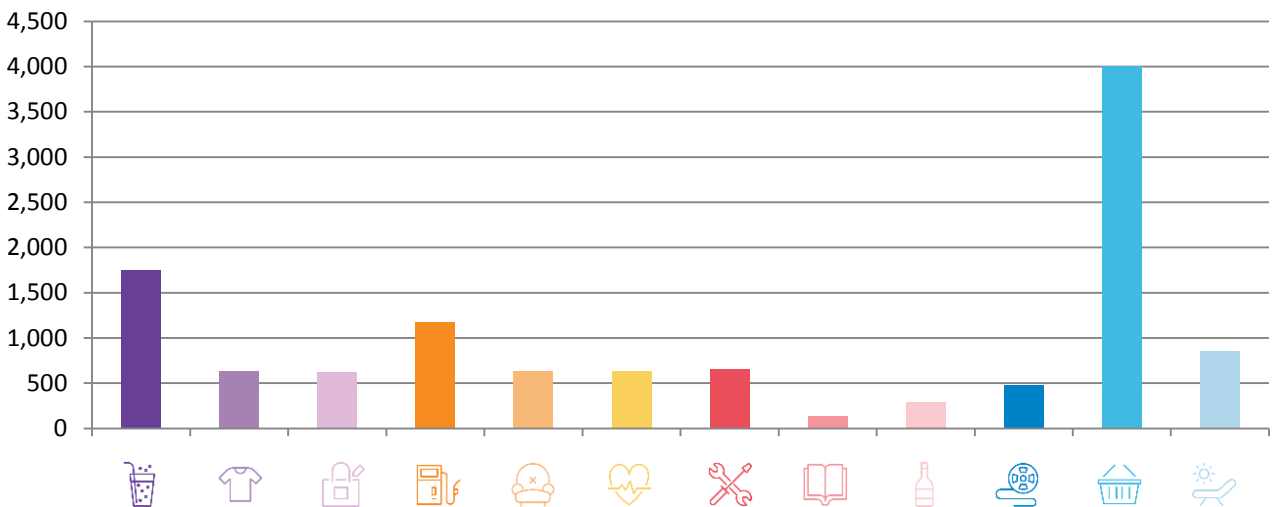
Compared to the same quarter of the previous year, spending increased in eleven of the twelve categories, with only Books & Stationery exhibiting a decrease (-5.3%). Fuel & Service Stations (+6.6%) showed the greatest increase in year on year, followed by Travel & Accommodation (+5.5%).

Quarterly summary

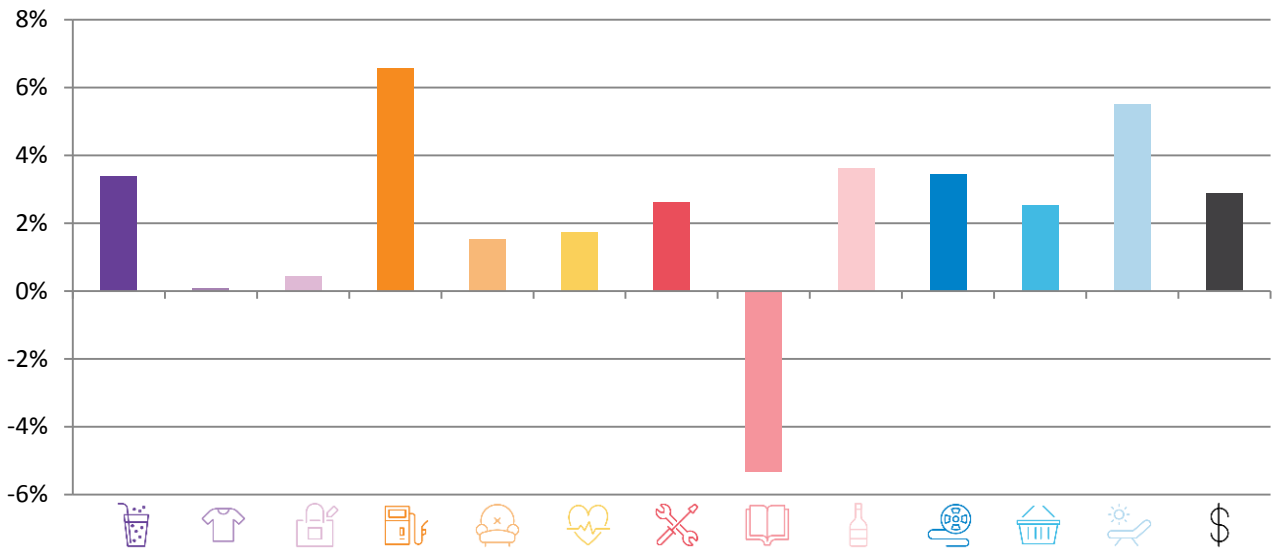
May 2017

Retailer Category	Quarter Total \$M	% Change vs Prior Quarter	% Change vs Last Year	% Share
 Cafés, Restaurants & Bars	1,745	-0.3%	3.4%	14.7%
 Clothing & Footwear	632	-7.6%	0.1%	5.3%
 Department Stores	624	-23.0%	0.4%	5.3%
 Fuel & Service Stations	1,178	-4.0%	6.6%	9.9%
 Furniture, Appliances & Electronics	639	-14.2%	1.5%	5.4%
 Health Goods & Services	638	9.2%	1.7%	5.4%
 Home & Building Supplies	653	-11.7%	2.6%	5.5%
 Books & Stationery Stores	141	-26.3%	-5.3%	1.2%
 Liquor Stores	289	-17.0%	3.6%	2.4%
 Recreation & Entertainment	484	-0.1%	3.4%	4.1%
 Supermarkets & Food Retailers	4,012	-4.8%	2.5%	33.7%
 Travel & Accommodation	853	0.9%	5.5%	7.2%
\$ TOTAL RETAIL SPEND	11,890	-5.8%	2.9%	100%

Quarterly spend by category (\$M)



Change vs last year



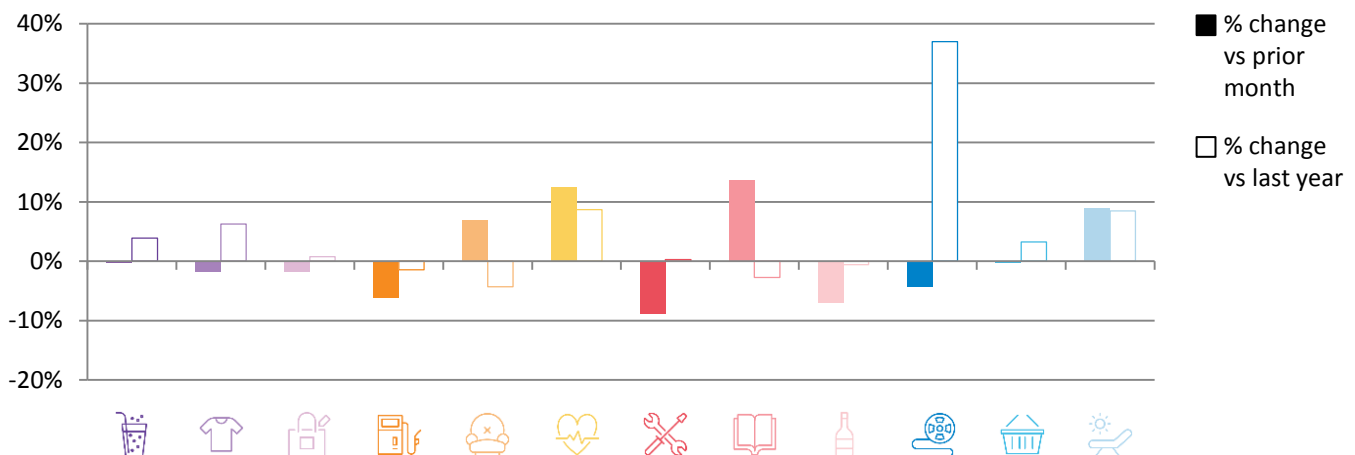
Selected regions of interest

May 2017

Monthly trends Taranaki

Retail spending in the Taranaki region increased in eight of the twelve categories compared to May last year. The greatest increase in year on year spend was seen in Recreation & Entertainment category (+37.0%) followed by Health Goods & Services (+8.7%). The greatest reduction in year on year spend was seen in the Furniture, Appliances & Electronics category, with a decrease of 4.3%.

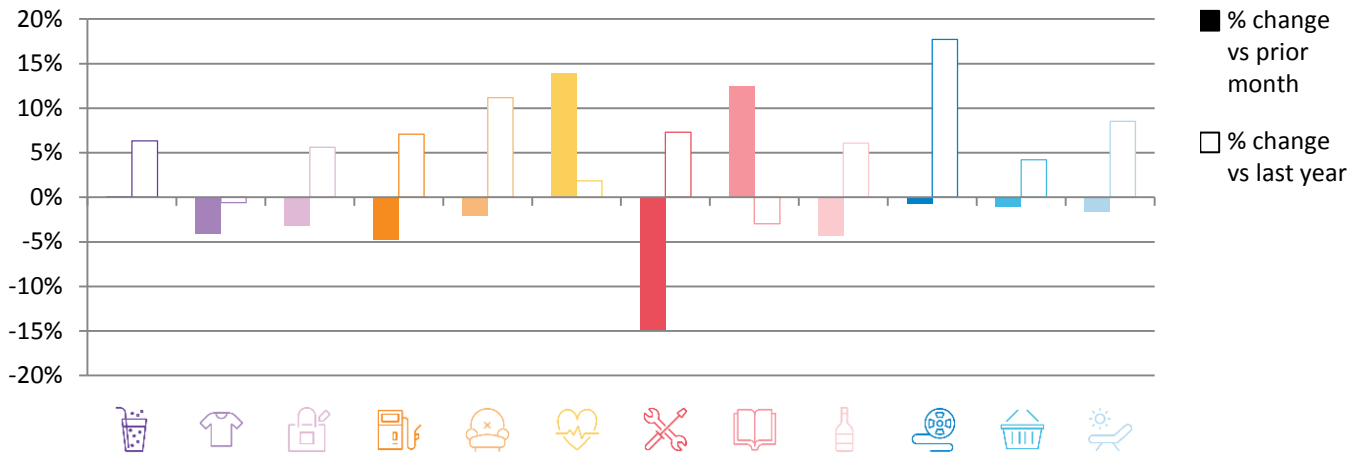
Compared to April, only four categories experienced increases in spend. Books & Stationery (+13.7%) exhibited the largest increase, with Health, Goods & Services (+12.5%) following closely behind. The greatest decrease in monthly spend was seen in the Home & Building Supplies category (-8.9%).



Monthly trends Wellington

Spending in Wellington was up in all but two categories year on year. The greatest increases in spend were seen in Recreation & Entertainment (+17.7%), Furniture, Appliances & Electronics (+11.2%) and Home & Building Supplies (+7.3%). The only decreases in spend as compared to May 2016 were in the Clothing & Footwear (-0.6%) and Books & Stationery Stores categories (-3.0%).

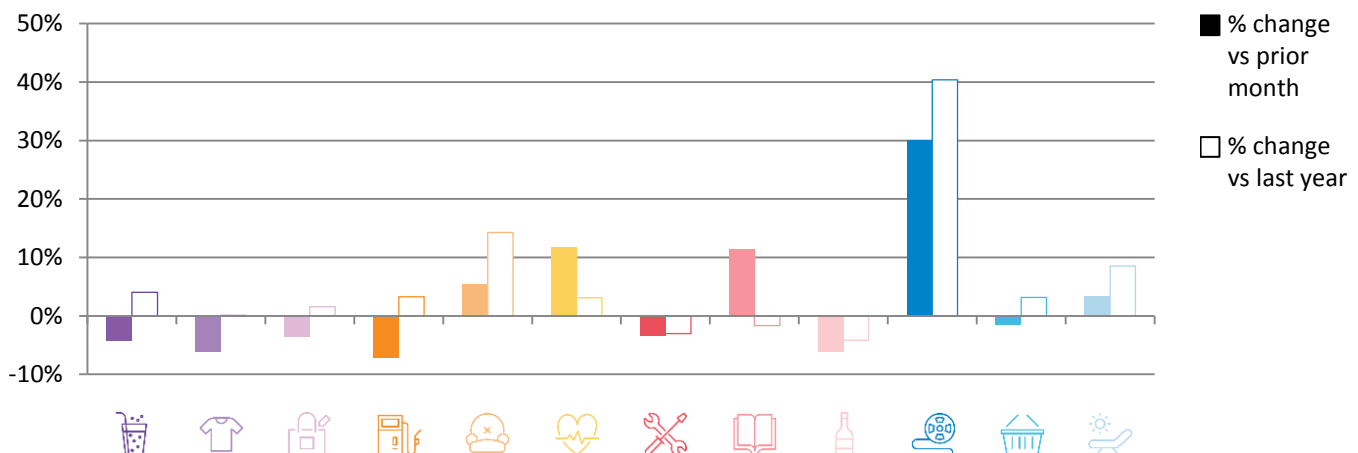
On the other hand, spending increased in just three of the twelve categories when compared to April. These increases were seen in the Health Goods & Services (+13.9%), Books & Stationery Stores (+12.4%), and Cafés, Restaurants & Bars (+0.1%) categories. The Home & Building Supplies category (-14.8%) saw the largest decrease in month on month spend.



Monthly trends Otago

Retail spend in the Otago region was up in all but three of the twelve categories compared to May 2016. The most substantial increase in spend was exhibited in the Recreation & Entertainment category (+40.4%), while the greatest decrease in spend was seen in the Liquor Stores category (-4.2%).

Month on month spend was in all but five categories, with the Fuel & Service Stations category (-7.1%) seeing the greatest decline, followed by a 6.0% decrease in Clothing & Footwear. As with the year on year figures, Recreation & Entertainment exhibited the most significant increase in monthly spend at 30.0% followed by Health Goods & Services (+11.8%), and Books & Stationery (+11.3%).



Going up this month

The greatest increase in spending this month was seen in the Health Goods & Services category, up 12.5%.

Three of the sixteen regions experienced increases in spend this month compared to April 2017.

6

Categories up

4

Regions up

Going down this month

The largest decrease in spending this month was seen in Home & Building Supplies, down 6.4%.

The West Coast region experienced the greatest decrease in spend this month, down 6.3% from April 2017.

6

Categories down

12

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 28/05/2017

Total online retail spend in New Zealand for the 28 days ending 28 May 2017 was \$384 million. This represents an increase of 20.1% year on year and an increase of 7.6% against the previous month.

Online spending was up in seven of the ten categories year on year. Recreation & Entertainment (+58.9%) saw the greatest increase in spending, while Health Goods & Services(-6.17%) exhibited the greatest decrease.

Spending was largely greater than in the previous month, with eight of the ten categories experiencing increases. The greatest increase in spend was exhibited by the Home & Building Supplies category (+46.1%), while Health Goods & Services (-11.2%) witnessed the largest decrease in spend.

Online Retailer Category	Month Total \$M	% Change vs Prior Month	% Change vs Last Year	% Share
 Clothing & Footwear	24.6	0.6%	20.8%	6.4%
 Department Stores	7.0	10.3%	33.8%	1.8%
 Furniture, Appliances & Electronics	23.5	-1.9%	30.2%	6.1%
 Health Goods & Services	7.2	-11.2%	-6.2%	1.9%
 Home & Building Supplies	3.5	46.1%	-5.9%	0.9%
 Books & Stationery Stores	8.0	8.6%	-4.9%	2.1%
 Liquor Stores	2.2	12.2%	11.0%	0.6%
 Recreation & Entertainment	92.8	25.7%	58.9%	24.2%
 Supermarkets & Food Retailers	34.0	13.4%	39.3%	8.9%
 Travel & Accommodation	181.2	1.6%	5.7%	47.2%
 Total Online Retail Spend	384.1	7.6%	20.1%	100.0%

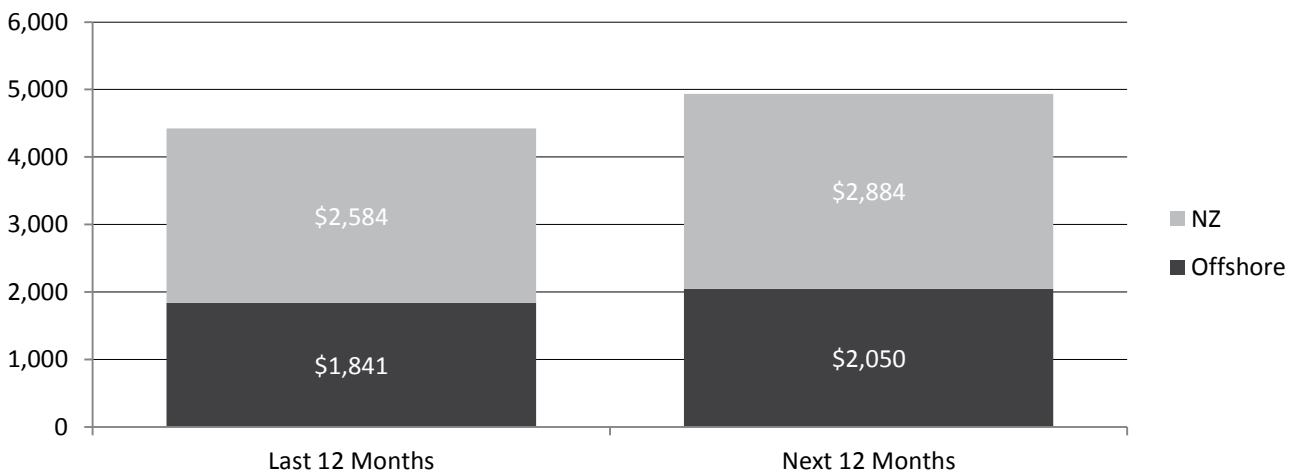
Online: New Zealand vs Offshore

New Zealand merchants accounted for 61.4% of online spend for the month of May. This was an increase of 18.1% compared to the previous month and a n increase of 29.1% compared to the prior year.

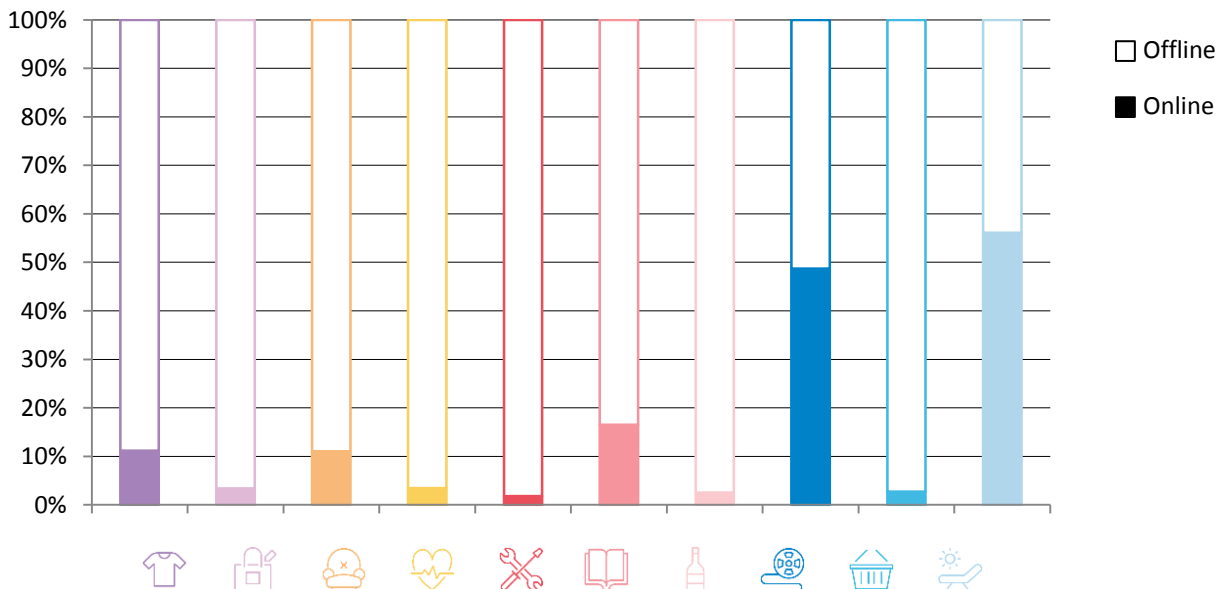
For New Zealand merchants, all but one category saw an increase in spend compared to April (Health Goods & Services -9.5%). The greatest monthly increase in spend was seen in Home & Building Supplies (+57.1%), followed closely by a 56.3% increase in Recreation & Entertainment.

Spend at offshore retail decreased by 5.7% when compared to the previous month but increased by 8.1% when compared to the same period last year. Offshore merchants saw increases in spend in seven categories year on year, the largest in Supermarkets/Food Retailers (+31.7%). Contrastingly, compared to the previous month, seven categories declined with the greatest decrease in the Home & Building Supplies category (+7.2%).

Projected total online spend (\$M)














% share of category spend

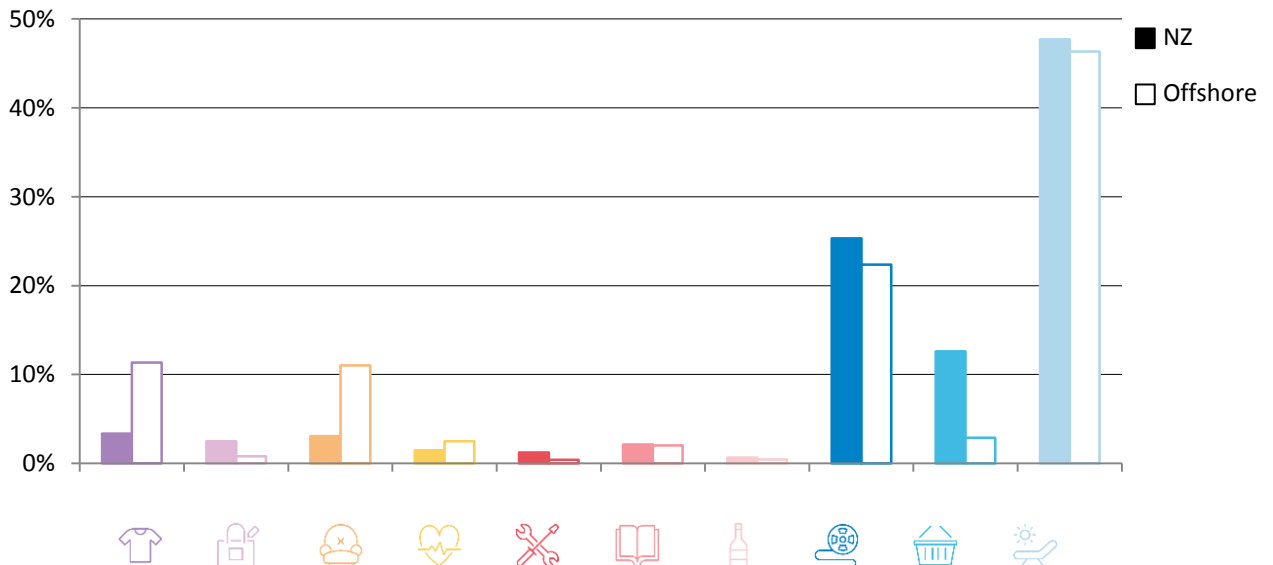


Online retail market summary New Zealand vs Offshore merchants

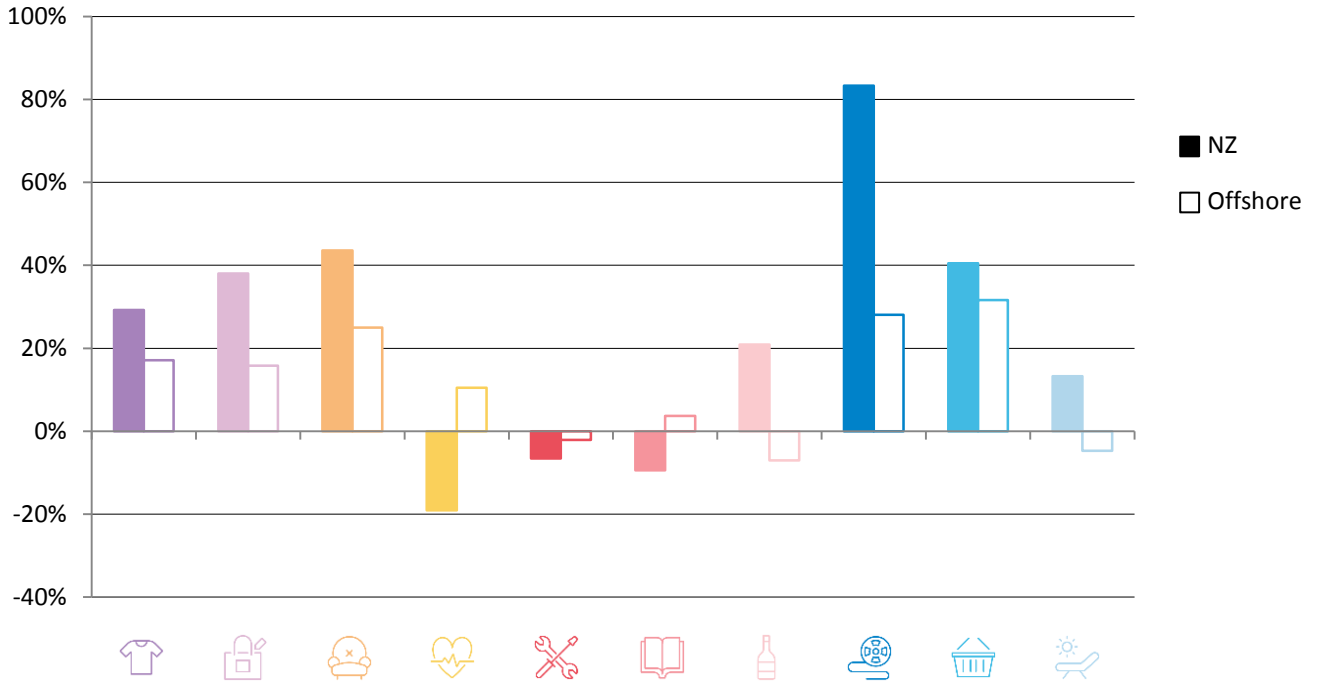
May 2017

Retailer Category	Month Total \$M		% Change vs Prior Month		% Change vs Last Year	
	NZ	Offshore	NZ	Offshore	NZ	Offshore
 Clothing & Footwear	7.9	16.8	2.7%	-0.4%	29.3%	17.1%
 Department Stores	5.9	1.2	16.4%	-12.5%	38.1%	15.8%
 Furniture, Appliances & Electronics	7.2	16.3	18.7%	-8.8%	43.5%	25.0%
 Health Goods & Services	3.5	3.7	-9.5%	-12.7%	-19.1%	10.5%
 Home & Building Supplies	2.9	0.6	57.1%	7.2%	-6.6%	-2.1%
 Books & Stationery Stores	5.0	3.0	12.8%	2.1%	-9.4%	3.7%
 Liquor Stores	1.5	0.7	17.8%	0.8%	20.9%	-7.0%
 Recreation & Entertainment	59.7	33.1	56.3%	-7.1%	83.3%	28.1%
 Supermarkets & Food Retailers	29.7	4.3	16.3%	-3.7%	40.5%	31.7%
 Travel & Accommodation	112.6	68.6	6.5%	-5.6%	13.3%	-4.7%
 Total Retail Spend	236.0	148.1	18.1%	-5.7%	29.1%	8.1%

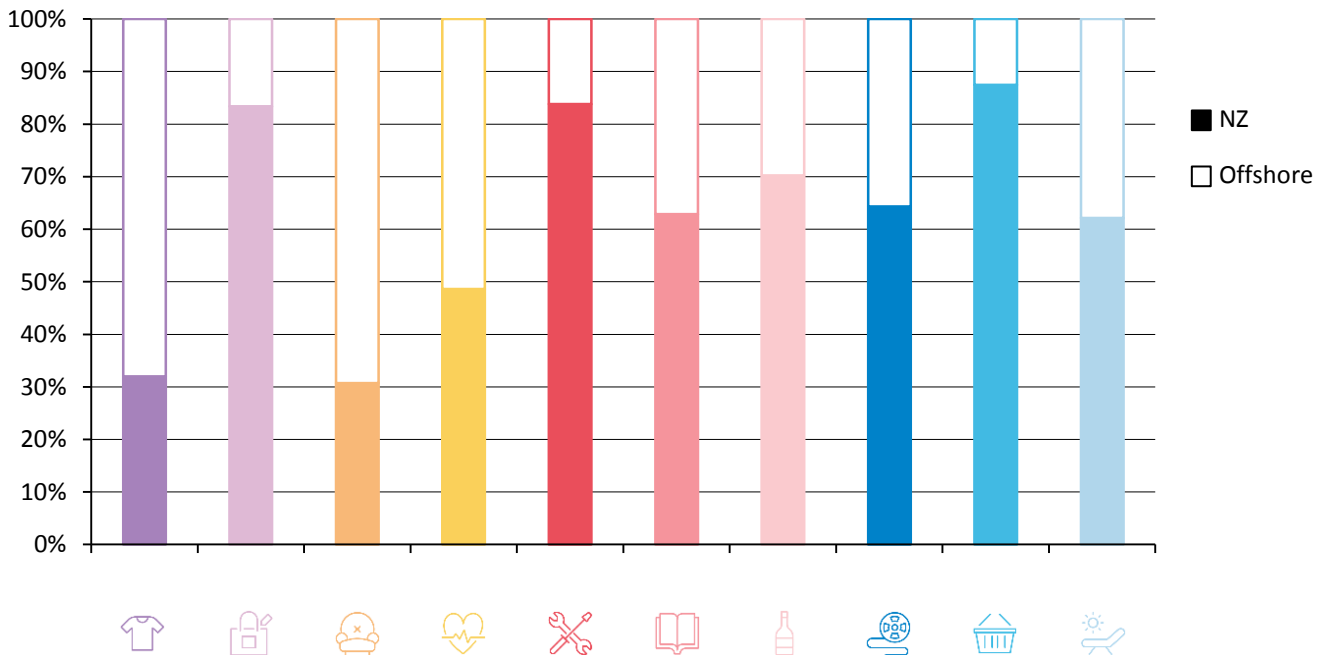
Online retailer total revenue by category (\$M)



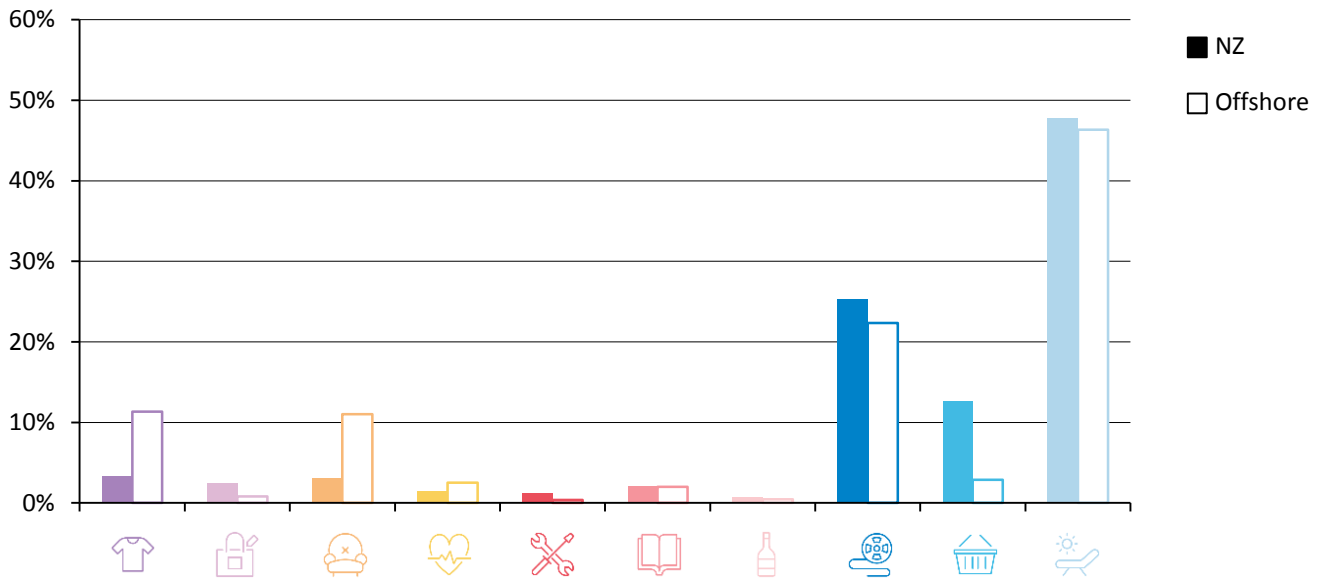
Monthly online revenue change YOY



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
 - Offshore: 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