



Retailwatch














Value of electronic card transactions within retail categories

Period ending 28/02/2018

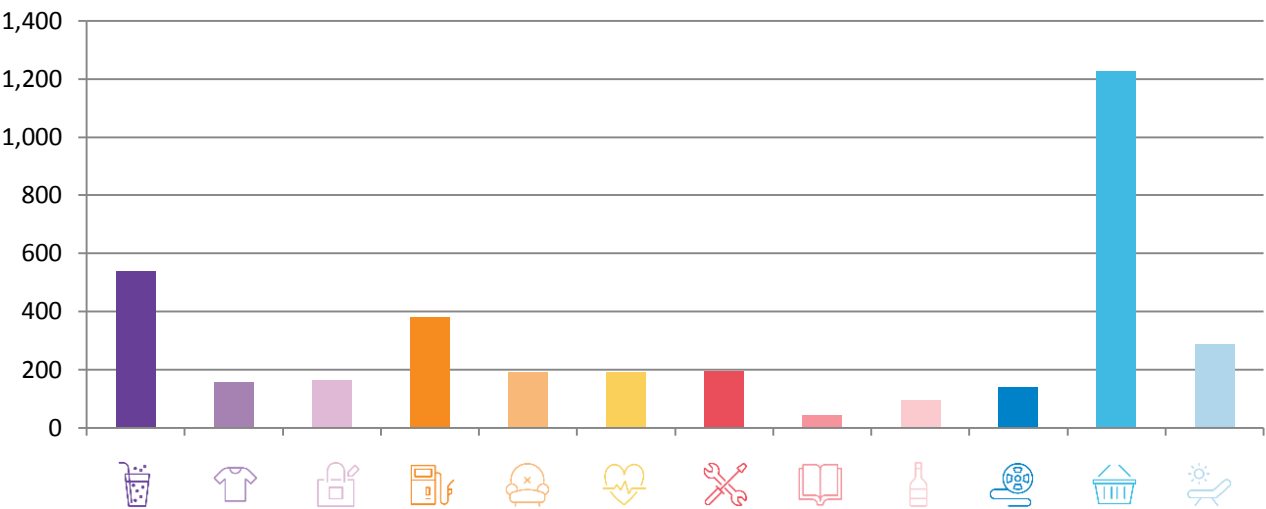
Total retail spend in New Zealand for the 28 days ending 28 February 2018 was \$3.61 billion. This was an increase of 0.7% compared to January and a decrease of 1.1% when compared to the same period last year.

Spending was up in four categories year-on-year, with Recreation & Entertainment (+3.0%) showing the greatest increase, followed by Cafés, Restaurants & Bars (+2.3%). The Books & Stationery Stores category exhibited the greatest decrease year-on-year, declining 6.9%. This was followed by the Clothing & Footwear category, down 4.5%.

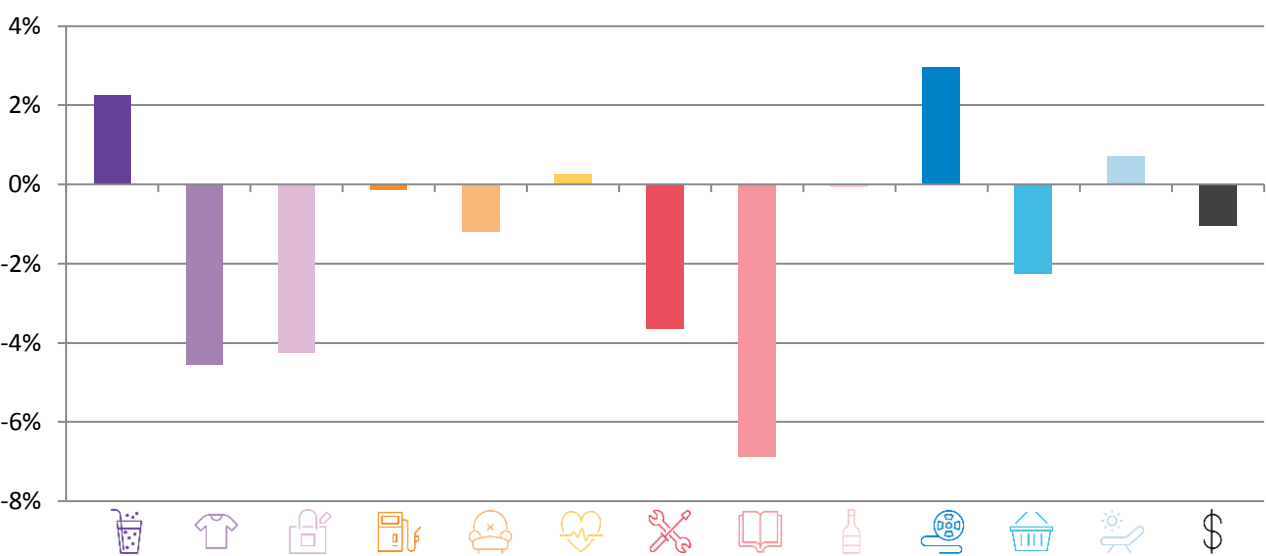
Month-on-month, six of the twelve categories experienced increases in spend with the largest increase seen in the Health Goods & Services category (+25.3%). The largest decreases in spend month-on-month were seen in the Books & Stationery Stores (-8.4%) and Clothing & Footwear (-8.1%) categories.

Retailer Category	Month Total \$M	% Change vs Prior Month	% Change vs Last Year	% Share
 Cafés, Restaurants & Bars	537	0.7%	2.3%	14.9%
 Clothing & Footwear	156	-8.1%	-4.5%	4.3%
 Department Stores	165	-5.0%	-4.3%	4.6%
 Fuel & Service Stations	381	1.6%	-0.1%	10.6%
 Furniture, Appliances & Electronics	190	1.0%	-1.2%	5.3%
 Health Goods & Services	192	25.3%	0.2%	5.3%
 Home & Building Supplies	195	-3.3%	-3.6%	5.4%
 Books & Stationery Stores	45	-8.4%	-6.9%	1.3%
 Liquor Stores	95	1.5%	-0.1%	2.6%
 Recreation & Entertainment	142	-5.5%	3.0%	3.9%
 Supermarkets & Food Retailers	1,226	1.7%	-2.3%	34.0%
 Travel & Accommodation	287	-2.5%	0.7%	7.9%
 TOTAL RETAIL SPEND	3,611	0.7%	-1.1%	100%

Monthly retail spend by category (\$M)



Change vs last year



Quarterly summary

February 2018














The total quarterly retail spend for the 91 days ending 28 February 2018 was \$12.64 billion. This was an increase of 5.0% when compared to the previous quarter and an increase of 0.3% when compared to the same period last year.

Nine of the twelve categories experienced an increase in spend when compared to the previous quarter. The largest increase in spending was in the Books & Stationery Stores category (+28.2%), followed by Department Stores (+20.5%). The largest decrease in spend was seen in Health Goods & Services category, declining 7.1%.

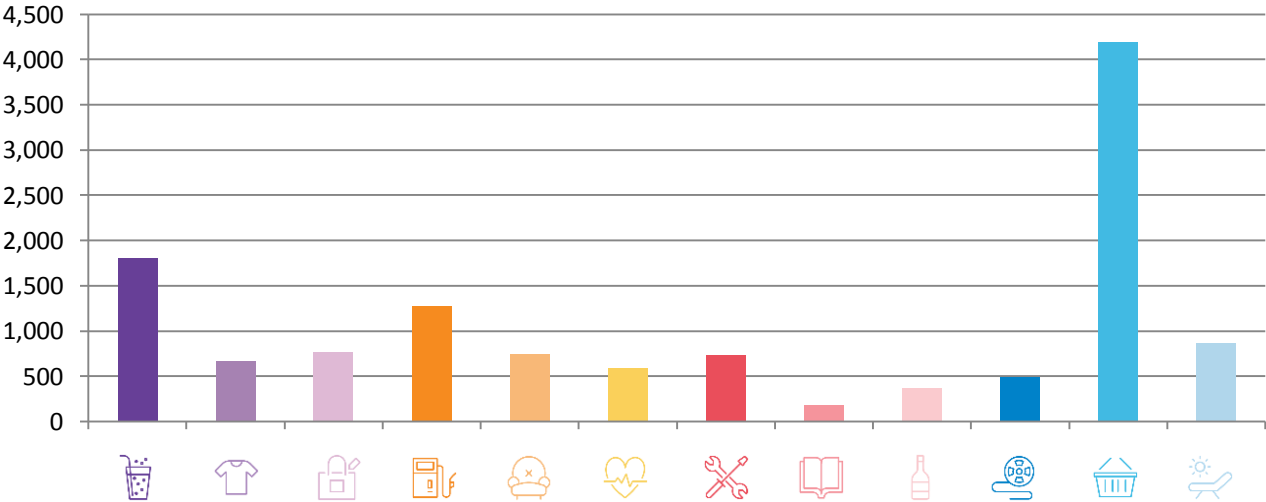
Compared to the same quarter of the previous year, spending increased in seven of the twelve categories. Books & Stationery Stores showed the greatest decrease year-on-year, declining 6.4%. Liquor Stores showed the greatest increase (+3.5%) and was closely followed by Fuel & Service Stations (+3.4%).

Quarterly summary

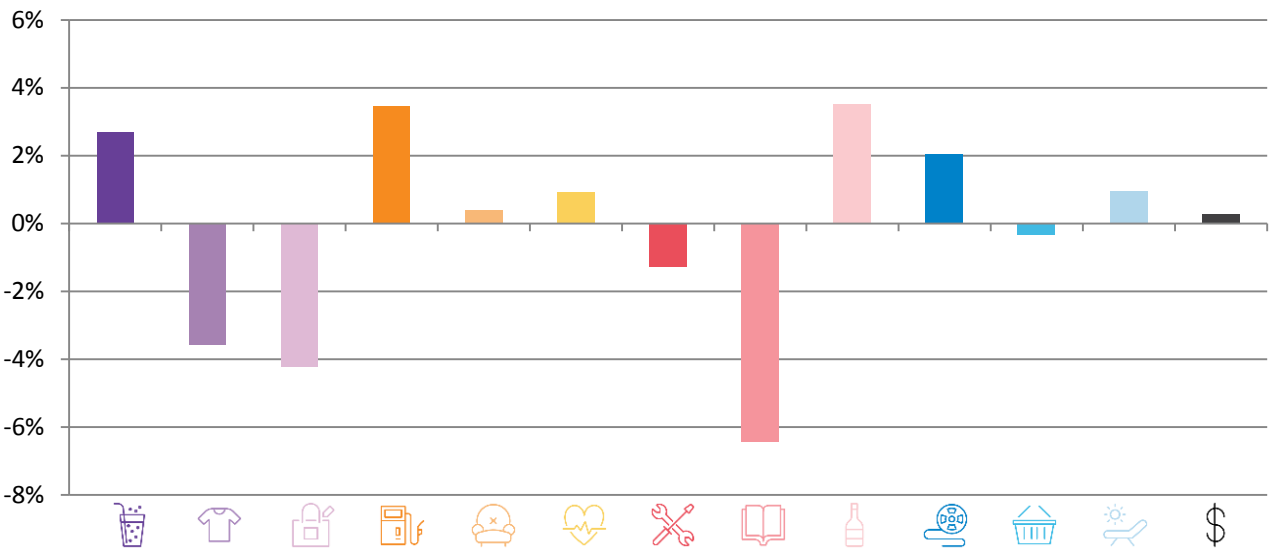
February 2018

Retailer Category	Quarter Total \$M	% Change vs Prior Quarter	% Change vs Last Year	% Share
 Cafés, Restaurants & Bars	1,800	1.2%	2.7%	14.2%
 Clothing & Footwear	657	10.5%	-3.6%	5.2%
 Department Stores	769	20.5%	-4.2%	6.1%
 Fuel & Service Stations	1,271	8.9%	3.4%	10.1%
 Furniture, Appliances & Electronics	745	9.8%	0.4%	5.9%
 Health Goods & Services	588	-7.1%	0.9%	4.6%
 Home & Building Supplies	730	-3.6%	-1.3%	5.8%
 Books & Stationery Stores	180	28.2%	-6.4%	1.4%
 Liquor Stores	360	18.1%	3.5%	2.8%
 Recreation & Entertainment	492	-1.2%	2.0%	3.9%
 Supermarkets & Food Retailers	4,193	3.2%	-0.3%	33.2%
 Travel & Accommodation	856	8.2%	0.9%	6.8%
 TOTAL RETAIL SPEND	12,641	5.0%	0.3%	100%

Quarterly spend by category (\$M)



Change vs last year



Selected regions of interest

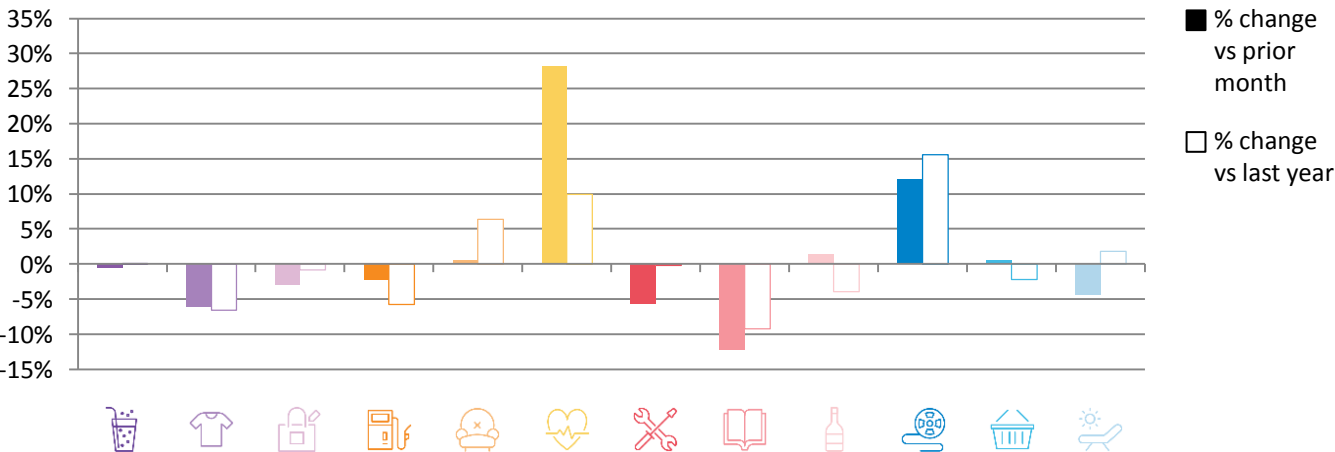
February 2018

Monthly trends Otago

Retail spend in the Otago region for the 28 days ending 28/02/2018 was \$173.7 million. This represents an increase of 0.2% from the previous month and a decrease of 0.6% year-on-year.

Retail spending in the Otago region increased in five of the twelve categories compared to February last year. The greatest increase in year-on-year spend was seen in the Recreation & Entertainment category (+15.5%), followed by Health Goods & Services (+9.9%). The greatest reduction in year-on-year spend was seen in the Books & Stationery Stores category (-9.2%).

Compared to January, seven categories experienced a decrease in spend. The greatest of these decreases were exhibited in the Books & Stationery Stores category (-12.2%), followed by Clothing & Footwear (-6.0%). Health Goods & Services (+28.1%) experienced the greatest month-on-month increase in spend.

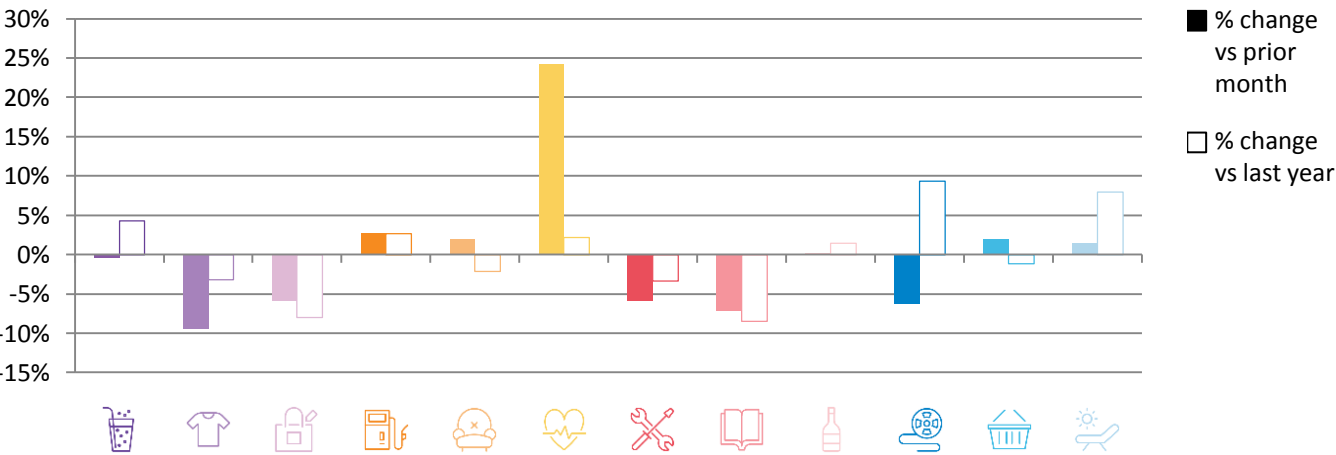


Monthly trends Waikato

Retail spend in the Waikato region for the 28 days ending 28/02/2018 was \$333.4 million. This represents an increase of 0.8% against the previous month and an increase of 0.5% year-on-year.

Compared to February 2017, spending was up in six categories, with Recreation & Entertainment (+9.4%) experiencing the largest increase in spend, followed by Travel & Accommodation (+7.9%). Books & Stationery Stores (-8.5%) experienced the greatest decrease in year-on-year spend.

Month-on-month spend was down in six categories with Clothing & Footwear (-9.5%) experiencing the largest decrease in spend, followed by Books & Stationery Stores (-7.2%). The Health Goods & Services category experienced the greatest increase in month-on-month spend, up 24.1%.

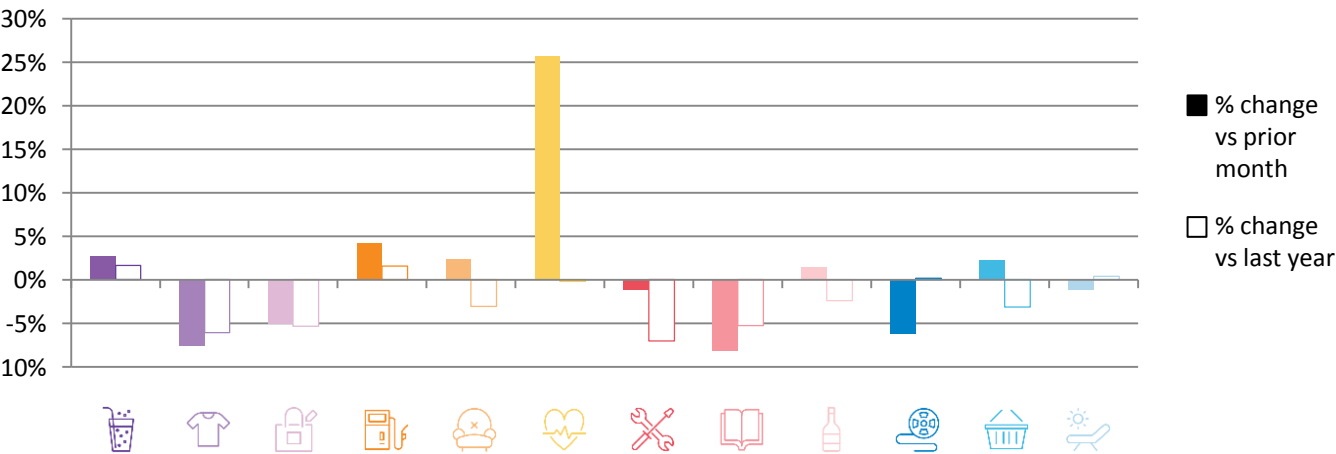


Monthly trends Auckland

Retail spend in the Auckland region for the 28 days ending 28/02/2018 was \$1.31 billion. This represents an increase of 1.7% against the previous month and a decrease of 1.7% year-on-year.

Retail spending in the Auckland region increased in four of the twelve categories year-on-year. Cafés, Restaurants & Bars (+1.7%) experienced the greatest increase in spend, followed closely by Fuel & Service Stations (+1.6%). The greatest decrease in spend was seen in the Home & Building Supplies category, declining 7.0%.

Compared to January, six categories experienced decreases in spend. The greatest increase was seen in the Health Goods & Services category (+25.8%). Books & Stationery Stores category saw the biggest decline with a 8.1% decrease, followed by Clothing & Footwear (-7.6%).



Going up this month

The greatest increase in spending this month was seen in the Health Goods & Services category, up 25.3%.

The Auckland region (+1.7%) and Gisborne Region (+1.6%) experienced the biggest month-on-month increases in February.

Going down this month

The largest decrease in spending this month was seen in the Books & Stationery Stores category, down 8.4%.

The Taranaki region experienced the greatest decrease in spend this month, down 3.3% when compared to January 2018.

6

Categories up

10

Regions up

6

Categories down

6

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 28/02/2018

Total online retail spend in New Zealand for the 28 days ending 28 February 2018 was \$370.6 million. This represents an increase of 7.1% year-on-year and a decrease of 3.0% against the previous month.

Online spending was up in six of the ten categories year-on-year. Supermarkets/Food Retailers (+21.3%) saw the greatest increase in spending, followed by Furniture/Appliances/Electronics (+15.1%). The Home & Building Supplies category (-15.1%) exhibited the greatest decrease in spend, followed by Books & Stationery Stores (-13.4%).

Month-on-month, six of the ten categories experienced decreases in spend. The greatest decrease in spend was exhibited by Home & Building Supplies (-14.6%). Supermarkets/Food Retailers (+14.9%) and Health Goods & Services (+12.2%) 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	22.9	-2.7%	4.8%	6.2%
	Department Stores	8.9	2.0%	11.0%	2.4%
	Furniture, Appliances & Electronics	25.9	-1.5%	15.1%	7.0%
	Health Goods & Services	7.0	12.2%	-11.2%	1.9%
	Home & Building Supplies	3.4	-14.6%	-15.1%	0.9%
	Books & Stationery Stores	7.0	-9.6%	-13.4%	1.9%
	Liquor Stores	2.1	5.1%	-4.0%	0.6%
	Recreation & Entertainment	71.7	-1.2%	9.5%	19.3%
	Supermarkets & Food Retailers	32.5	14.9%	21.3%	8.8%
	Travel & Accommodation	189.2	-6.6%	5.6%	51.0%
	Total Online Retail Spend	370.6	-3.0%	7.1%	100%

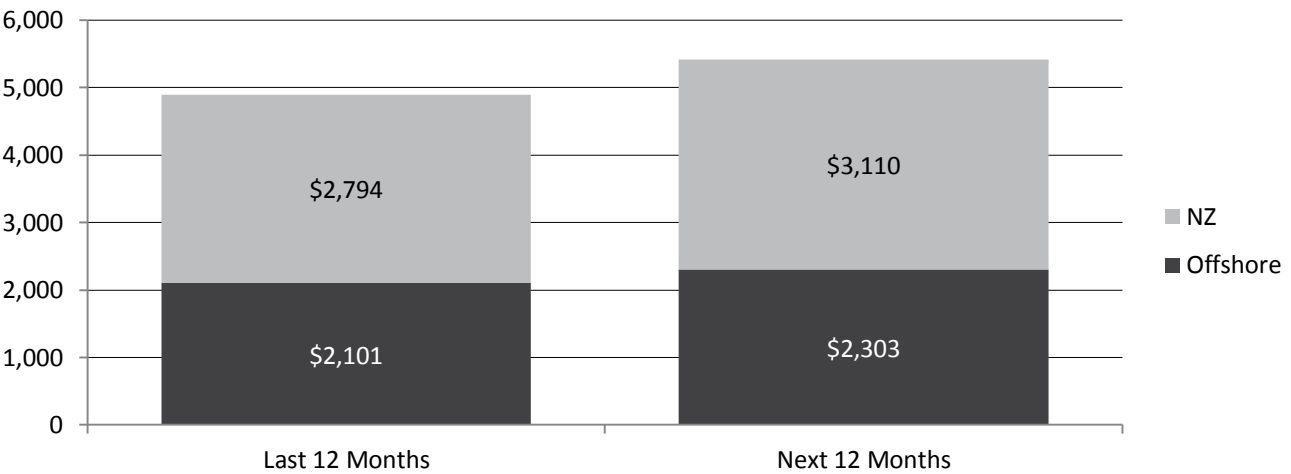
Online: New Zealand vs Offshore

New Zealand merchants accounted for 59.2% of online spend for the month of February. This was an decrease of 0.5% compared to the previous month and an increase of 7.2% compared to the previous year.

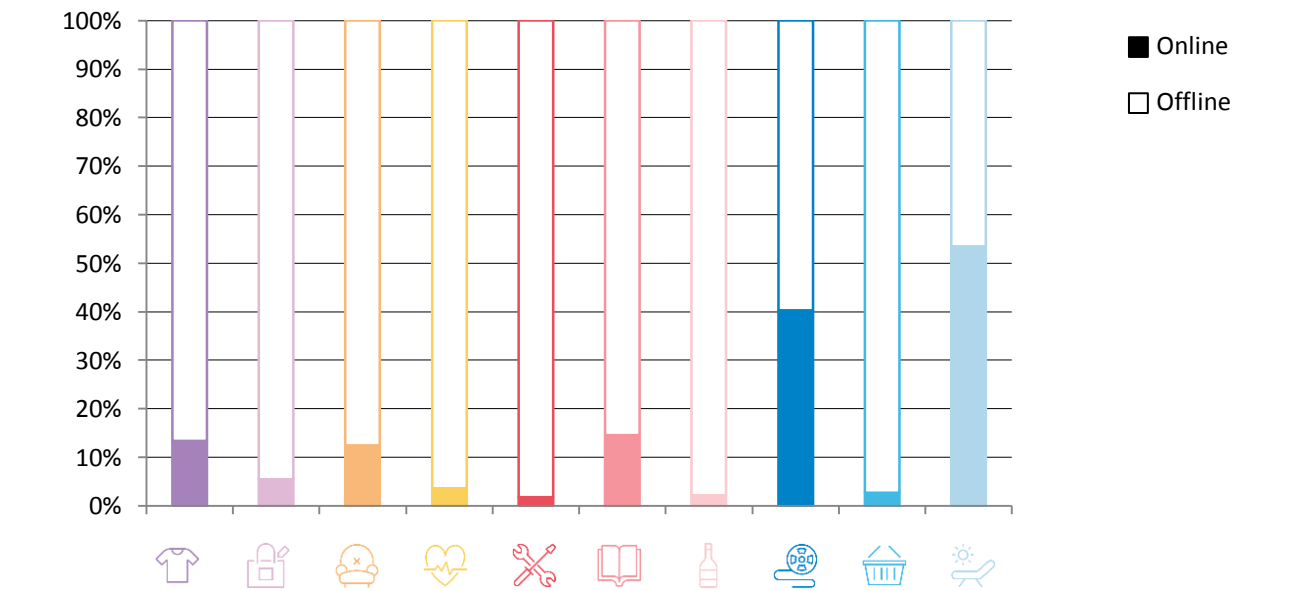
For New Zealand merchants, six of the ten categories saw increases in spend compared to January, with Home & Building Supplies (-14.3%) experiencing the greatest decrease in spend. Health Goods & Services and Supermarkets/Food Retailers saw the greatest increases compared to January, going up 27.4% and 18.9% respectively. New Zealand merchants saw increases in six categories when compared to February 2017.

Spend at offshore retail decreased by 6.4% when compared to the previous month but increased by 7.0% when compared to the same period last year. Offshore merchants saw increases in spend in six categories year-on-year, the largest in Furniture/Appliances/Electronics (+16.1%), followed closely by the Department Stores Category (+15.7%)

Projected total online spend (\$M)














% share of category spend

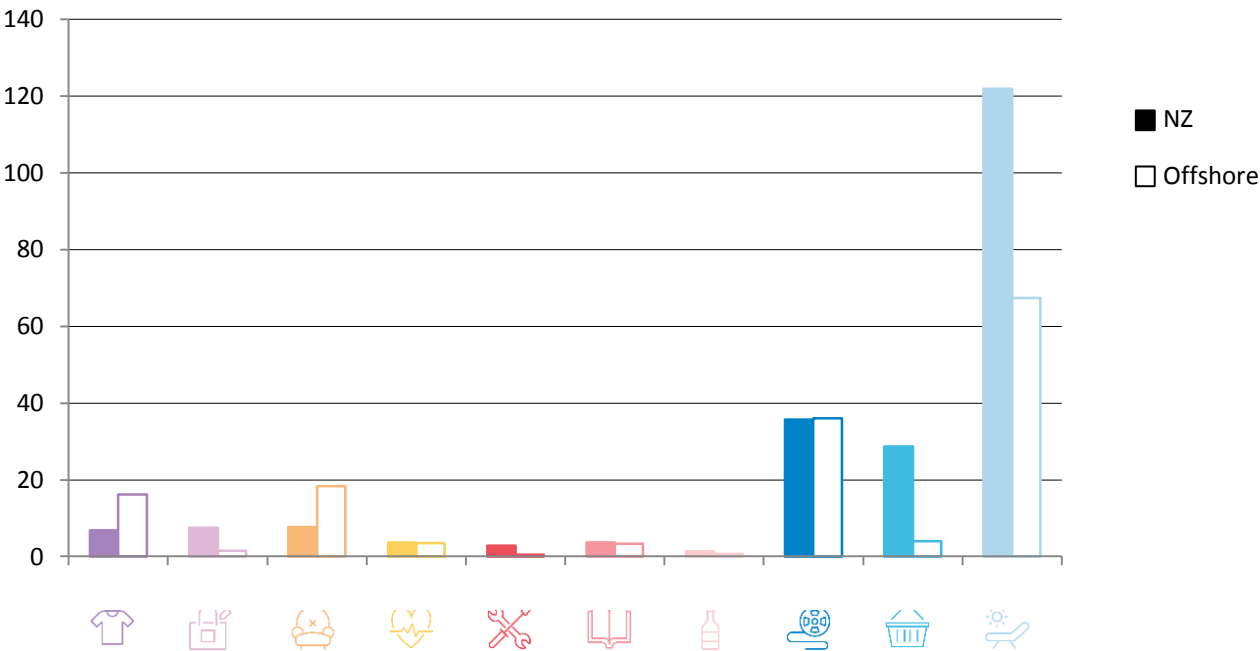


Online retail market summary New Zealand vs Offshore merchants

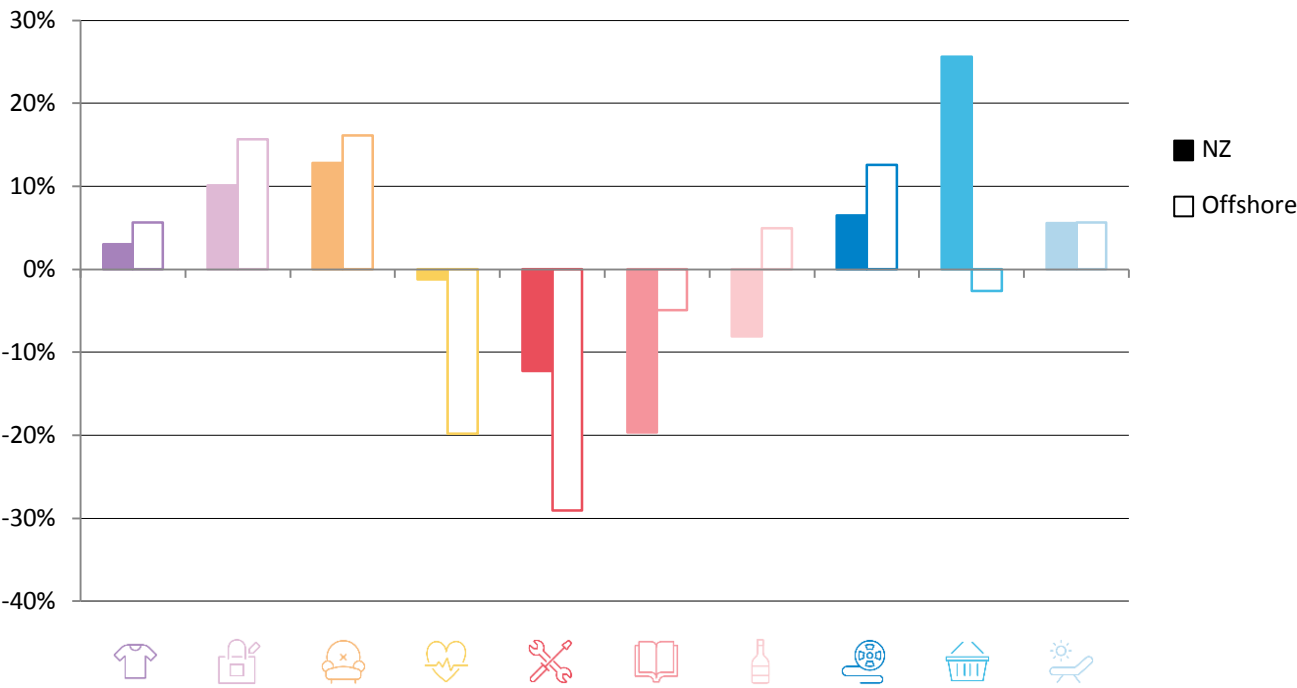
February 2018

Retailer Category	Month Total \$M		% Change vs Prior Month		% Change vs Last Year	
	NZ	Offshore	NZ	Offshore	NZ	Offshore
 Clothing & Footwear	6.8	16.2	4.0%	-5.3%	3.0%	5.6%
 Department Stores	7.4	1.5	8.2%	-21.1%	10.1%	15.7%
 Furniture, Appliances & Electronics	7.6	18.3	3.1%	-3.4%	12.8%	16.1%
 Health Goods & Services	3.6	3.4	27.4%	-0.3%	-1.2%	-19.8%
 Home & Building Supplies	2.9	0.5	-14.3%	-16.2%	-12.2%	-29.1%
 Books & Stationery Stores	3.7	3.3	-7.7%	-11.7%	-19.7%	-4.9%
 Liquor Stores	1.4	0.7	-4.3%	29.6%	-8.1%	5.0%
 Recreation & Entertainment	35.7	36.0	5.5%	-7.1%	6.5%	12.6%
 Supermarkets & Food Retailers	28.6	3.9	18.9%	-7.7%	25.6%	-2.6%
 Travel & Accommodation	121.8	67.4	-6.5%	-6.8%	5.5%	5.6%
 Total Retail Spend	219.5	151.0	-0.5%	-6.4%	7.2%	7.0%

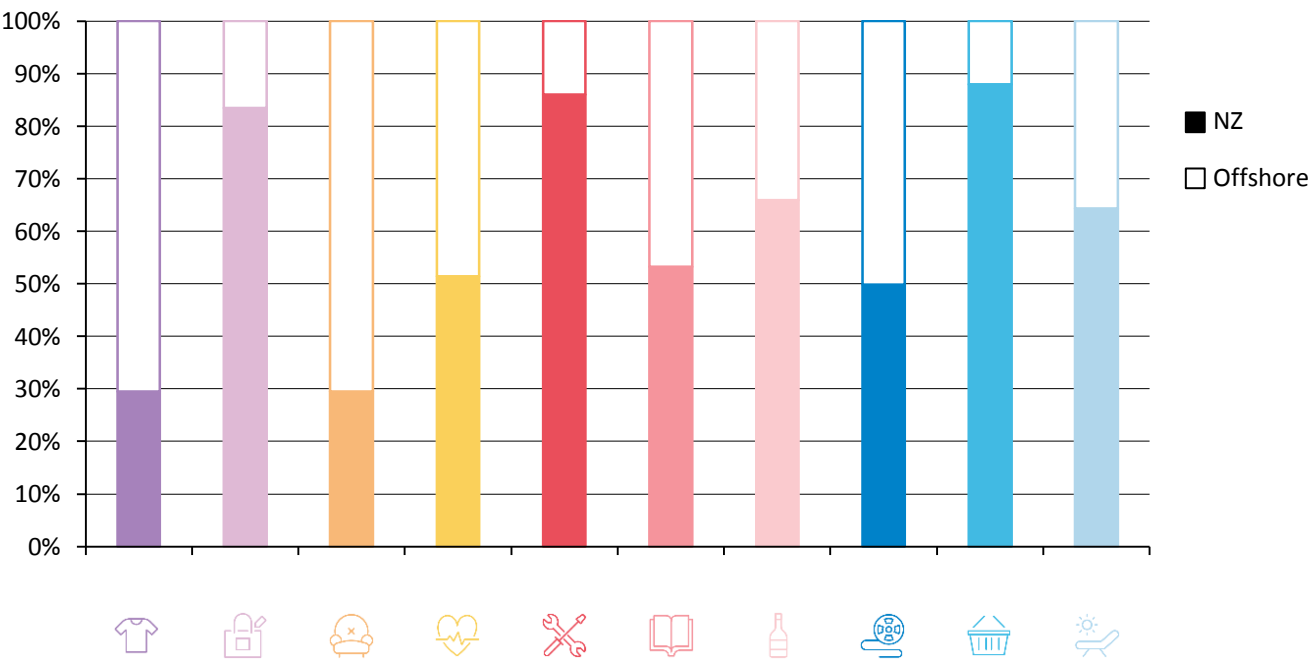
Online retailer total revenue by category (\$M)



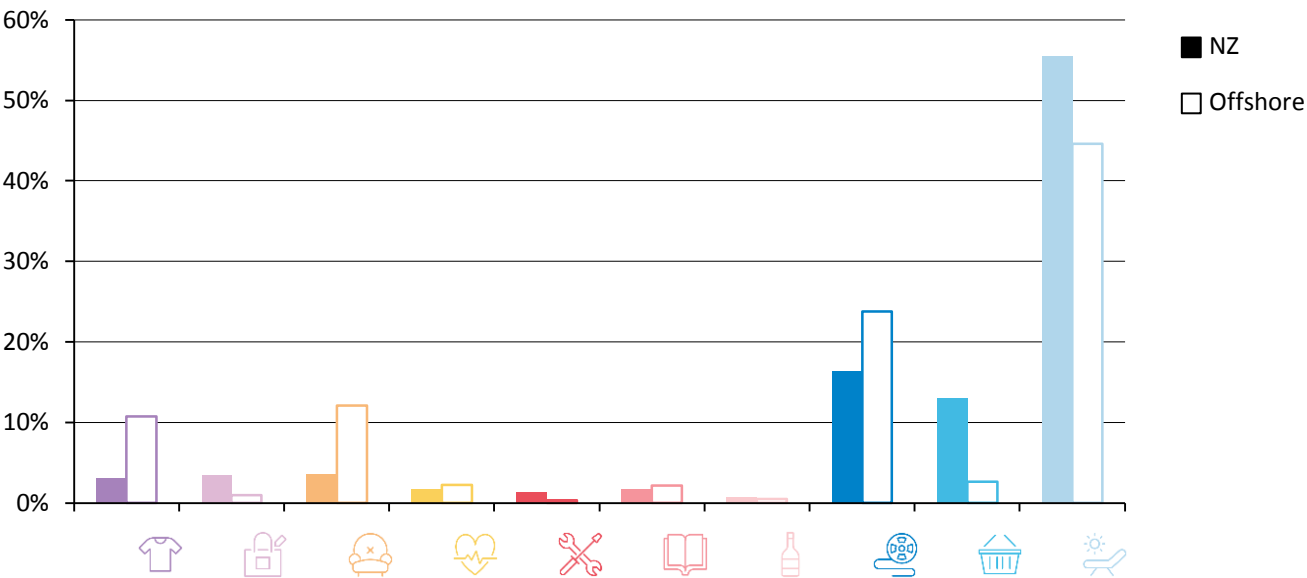
Monthly online revenue change year-on-year



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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