



Retailwatch














Value of electronic card transactions within retail categories

Period ending 28/03/2018

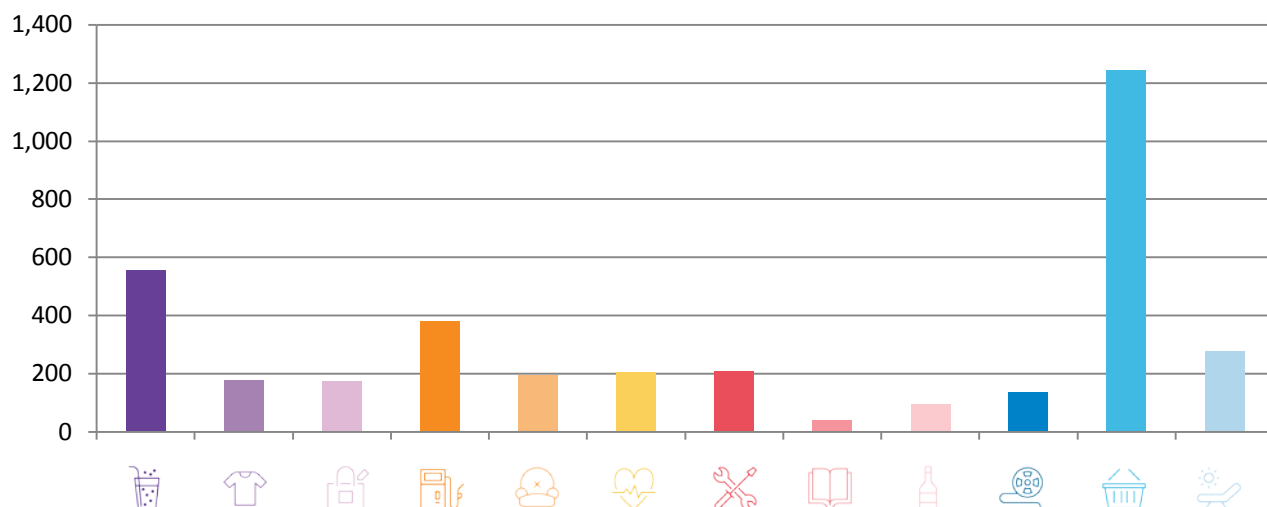
Total retail spend in New Zealand for the 28 days ending 28 March 2018 was \$3.7 billion. This was an increase of 1.1% compared to February and 2.3% when compared to the same period last year.

Spending was up in nine categories year-on-year; the Home & Building Supplies category saw the greatest increase with 7.0%. Two decreases were seen in the Books & Stationery Stores and Clothing & Footwear categories decreasing by 8.7% and 3.2% respectively, while Department Stores showed no change year-on-year.

Month-on-month, seven of the twelve categories experienced increases in spend with the largest increase seen in the Clothing & Footwear category (+12.0%). The largest decrease in spend month-on-month was seen in Books & Stationery Stores, dropping by 12.5%.

Retailer Category	Month Total \$M	% Change vs Prior Month	% Change vs Last Year	% Share
 Cafés, Restaurants & Bars	558	3.0%	5.1%	15.1%
 Clothing & Footwear	178	12.0%	-3.2%	4.8%
 Department Stores	174	4.1%	0.0%	4.7%
 Fuel & Service Stations	382	-0.9%	3.9%	10.3%
 Furniture, Appliances & Electronics	197	1.7%	0.5%	5.3%
 Health Goods & Services	205	5.4%	2.6%	5.5%
 Home & Building Supplies	211	6.4%	7.0%	5.7%
 Books & Stationery Stores	40	-12.5%	-8.7%	1.1%
 Liquor Stores	95	-0.3%	5.7%	2.6%
 Recreation & Entertainment	138	-4.3%	1.2%	3.7%
 Supermarkets & Food Retailers	1,244	0.4%	1.5%	33.6%
 Travel & Accommodation	278	-5.4%	1.7%	7.5%
 TOTAL RETAIL SPEND	3,700	1.1%	2.3%	100%

Monthly retail spend by category (\$M)



Change vs last year



Quarterly summary

March 2018














The total quarterly retail spend for the 91 days ending 28 March 2018 was \$11.89 billion. This was a decrease of 8.4% when compared to the previous quarter and an increase of 0.9% when compared to the same period last year.

Only two of the twelve categories experienced an increase in spend when compared to the previous quarter. Travel & Accommodation experienced an increase of 21.2% while Fuel & Service Stations only saw a rise of 0.3%. The largest decreases in spend were seen in the Department Stores category (-33.5%), followed by Clothing & Footwear (-22.3%).

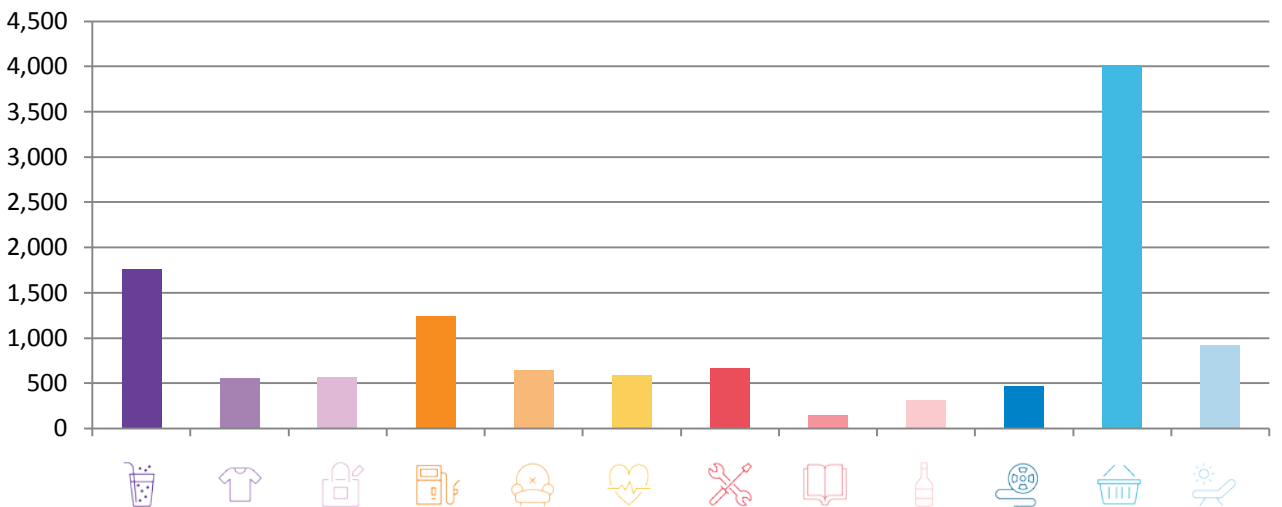
Compared to the same quarter of the previous year, spending increased in eight of the twelve categories. Cafés, Restaurants & Bars and Liquor Stores categories were equal with increases of 3.6%, followed by Fuel & Service Stations at 3.1%.

Quarterly summary

March 2018

Retailer Category	Quarter Total \$M	% Change vs Prior Quarter	% Change vs Last Year	% Share
 Cafés, Restaurants & Bars	1,763	-4.2%	3.6%	14.8%
 Clothing & Footwear	553	-22.3%	-3.8%	4.7%
 Department Stores	563	-33.5%	-3.1%	4.7%
 Fuel & Service Stations	1,243	0.3%	3.1%	10.5%
 Furniture, Appliances & Electronics	641	-18.9%	1.4%	5.4%
 Health Goods & Services	588	-9.1%	2.6%	4.9%
 Home & Building Supplies	668	-19.1%	0.2%	5.6%
 Books & Stationery Stores	147	-14.7%	-6.2%	1.2%
 Liquor Stores	316	-11.9%	3.6%	2.7%
 Recreation & Entertainment	471	-7.9%	2.2%	4.0%
 Supermarkets & Food Retailers	4,011	-6.2%	0.0%	33.7%
 Travel & Accommodation	924	21.2%	1.9%	7.8%
 TOTAL RETAIL SPEND	11,888	-8.4%	0.9%	100%

Quarterly spend by category (\$M)



Change vs last year



Selected regions of interest

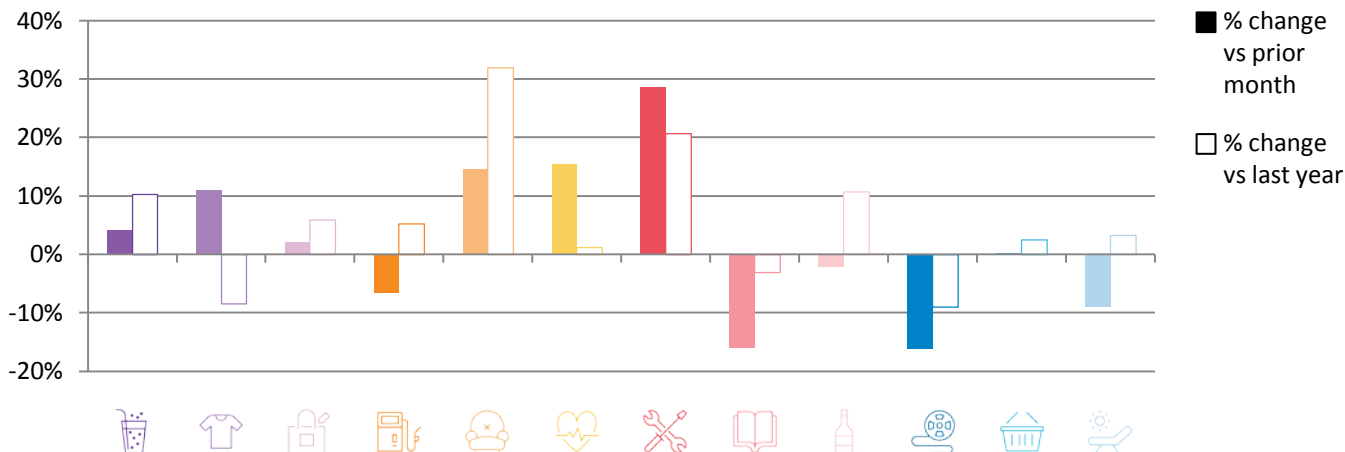
March 2018

Monthly trends Gisborne

Retail spend in the Gisborne region for the 28 days ending 28/03/2018 was \$32.9 million. This represents increases of 1.4% from the previous month and 5.4% year-on-year.

Retail spending in the Gisborne region increased in nine of the twelve categories compared to March last year. The greatest increase in year-on-year spend was seen in the Furniture, Appliances & Electronics category (+31.9%), followed by the Home & Building Supplies categories (+20.7%). The greatest reductions in year-on-year spend were seen in Recreation & Entertainment and Clothing & Footwear categories with drops of 9.0% and 8.5% respectively.

Compared to February, six categories experienced an increase in spend. The greatest of these increases was exhibited in Home & Building Supplies, with a rise of 28.7%. While the Recreation & Entertainment (-16.3%) and Books & Stationery Stores categories (-15.9%) saw the greatest decline in spend.

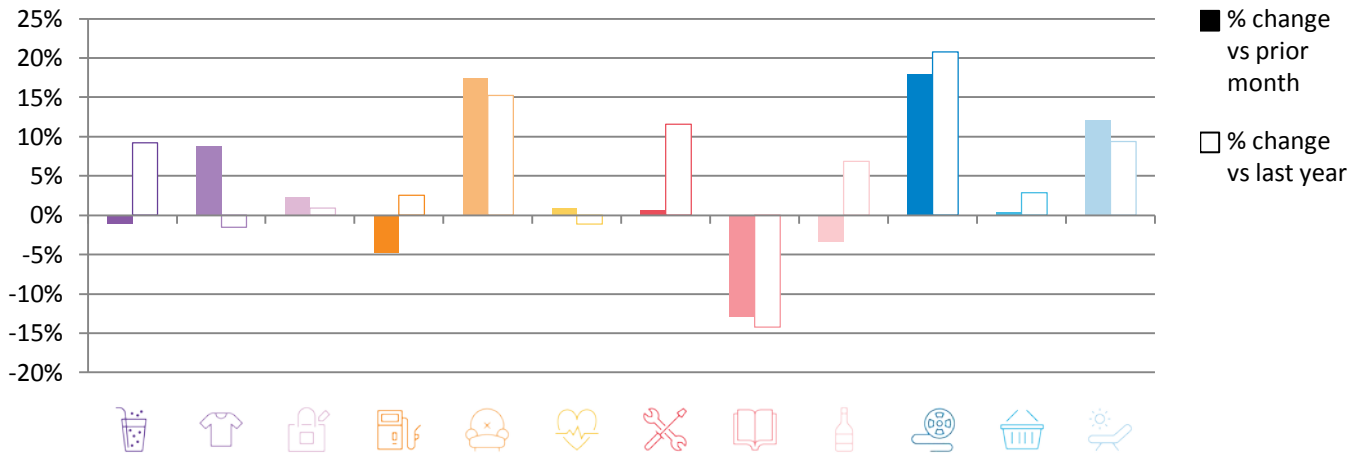


Monthly trends Nelson

Retail spend in the Nelson region (excluding Tasman) for the 28 days ending 28/03/2018 was \$38.7 million. This represents an increase of 2.3% against the previous month and an increase of 5.1% year-on-year.

Compared to March 2017, spending was up in nine categories, with Recreation & Entertainment (+20.8%) experiencing the largest increase in spend, followed by Furniture, Appliances & Electronics (+15.3%). Books & Stationery Stores experienced the greatest decrease, down 14.2% for year-on-year spend.

Month-on-month spend was up in eight categories with Recreation & Entertainment experiencing the largest increase, (+17.9%) followed closely by the Furniture, Appliances & Electronics category with a 17.4% increase in spend. The Books & Stationery Stores category experienced the greatest decrease in month-on-month spend, down 12.9%.

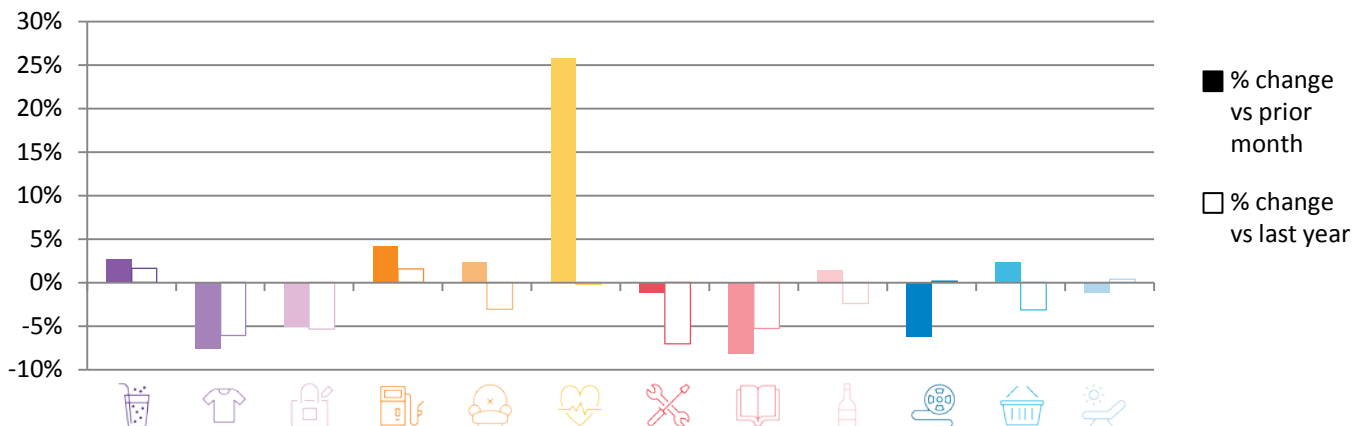


Monthly trends West Coast

Retail spend in the West Coast region for the 28 days ending 28/03/2018 was \$22.3 million. This represents a decrease of 1.6% against the previous month and a decrease of 1.7% year-on-year.

Retail spending in the West Coast region increased in four of the twelve categories year-on-year. Furniture, Appliances & Electronic experienced the greatest increase in spend going up 28.3%. The biggest declines were in the Clothing & Footwear category (-12.9%) followed by Department Stores (-7.2%).

Compared to February, five categories experienced increases in spend. The greatest increase was seen in the Health Goods & Services category (+13.4%). Books & Stationery Stores category saw the biggest decline with a 10.9% decrease, followed by Furniture, Appliances & Electronic with a drop of 10.3%.



Going up this month

The greatest increase in spending this month was seen in the Clothing & Footwear category, up 12.0%.

The Hawkes Bay region (+3.5%) and Nelson Region (+2.3%) experienced the biggest month-on-month increases in March.

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Categories up

14

Regions up

Going down this month

The largest decrease in spending this month was seen in the Books & Stationery Stores category, down 12.5%.

The West Coast region experienced the greatest decrease in spend this month, down 1.6% when compared to February 2018.

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Categories down

2

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 28/03/2018

Total online retail spend in New Zealand for the 28 days ending 28 March 2018 was \$387.6 million. This represents an increase of 6.3% year-on-year and a decrease of 2.7% against the previous month.

Online spending was up in eight of the ten categories year-on-year. Liquor stores saw the greatest increase in spending, up 24.4%, followed by Supermarkets & Food Retailers increasing 23.5%. The Books & Stationery Stores category exhibited the greatest decrease in spend, declining 7.6%.

Month-on-month, four of the ten categories experienced increases in spend. The greatest increase in spend was exhibited in Home & Building Supplies (+9.1%). Decreases were seen in the Furniture, Appliances, Electronics category (-7.1%) and Books & Stationery Stores, down 4.1%.

Online Retailer Category	Month Total \$M	% Change vs Prior Month	% Change vs Last Year	% Share
 Clothing & Footwear	26.6	6.2%	10.1%	6.9%
 Department Stores	9.1	-2.8%	9.7%	2.3%
 Furniture, Appliances & Electronics	27.0	-7.1%	17.3%	7.0%
 Health Goods & Services	8.0	4.4%	-4.8%	2.1%
 Home & Building Supplies	4.2	9.1%	14.7%	1.1%
 Books & Stationery Stores	7.1	-4.1%	-7.6%	1.8%
 Liquor Stores	2.3	6.3%	24.4%	0.6%
 Recreation & Entertainment	76.4	-3.0%	9.8%	19.7%
 Supermarkets & Food Retailers	33.8	-0.2%	23.5%	8.7%
 Travel & Accommodation	193.0	-3.9%	1.4%	49.8%
 Total Online Retail Spend	387.6	-2.7%	6.3%	100%

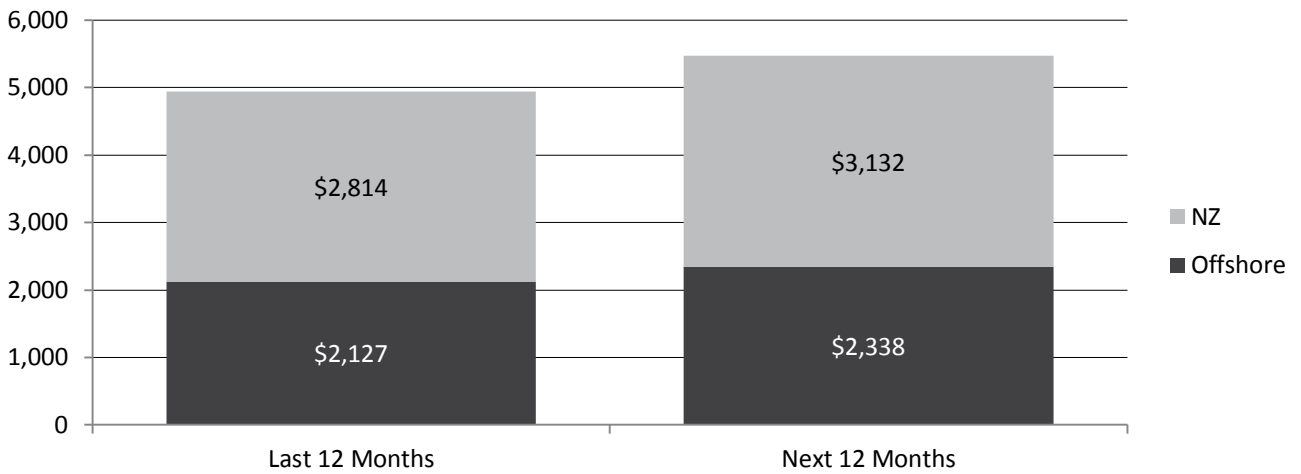
Online: New Zealand vs Offshore

New Zealand merchants accounted for 59.2% of online spend for the month of March. This was an increase of 3.4% compared to the previous month and an increase of 4.7% compared to the previous year.

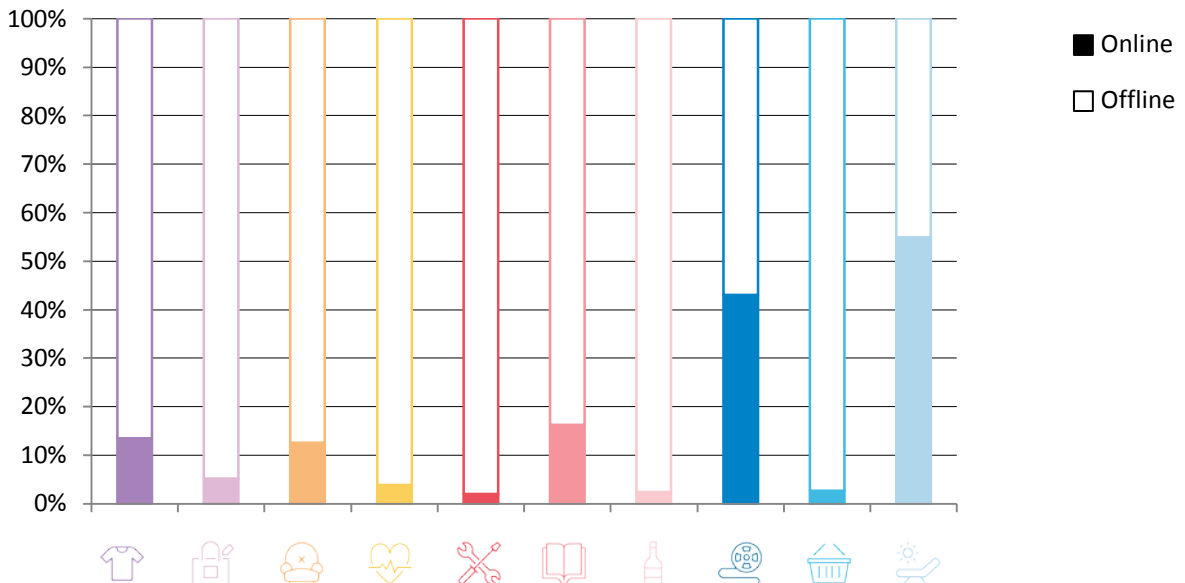
For New Zealand merchants, four of the ten categories saw increases in spend compared to February, with Liquor Stores experiencing the greatest increase in spend, going up 19.9%, this was followed by Home & Building Supplies (+11.0%). Travel & Accommodation saw the biggest decrease in online spend, dropping 5.6%. New Zealand merchants saw increases in nine categories when compared to March 2017.

Spend at offshore retail decreased by 1.7% when compared to the previous month but increased by 8.6% when compared to the same period last year. Offshore merchants saw increases in spend in seven categories year-on-year, the largest seen in Department Stores (+34.4%), followed by the Liquor Stores category, increasing 22.6%.

Projected total online spend (\$M)














% share of category spend

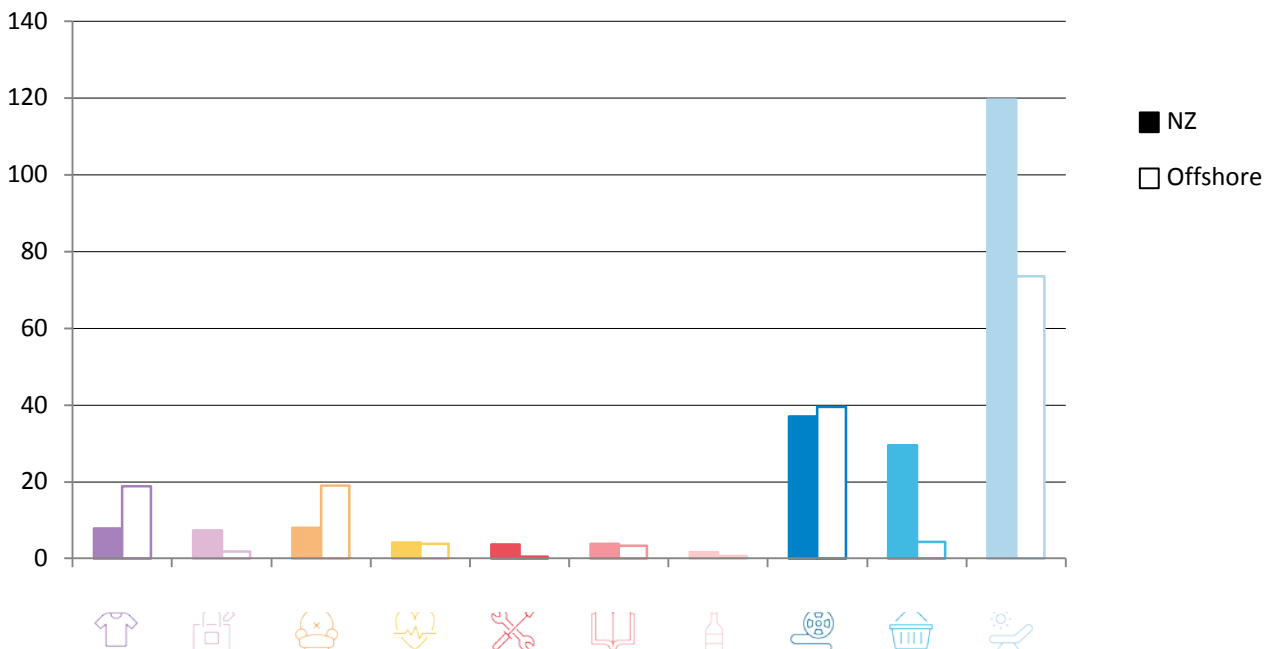


Online retail market summary New Zealand vs Offshore merchants

March 2018

Retailer Category	Month Total \$M		% Change vs Prior Month		% Change vs Last Year	
	NZ	Offshore	NZ	Offshore	NZ	Offshore
 Clothing & Footwear	7.8	18.8	5.4%	6.6%	1.1%	14.4%
 Department Stores	7.3	1.8	-4.8%	6.2%	5.0%	34.4%
 Furniture, Appliances & Electronics	8.0	19.0	-1.2%	-9.3%	13.0%	19.2%
 Health Goods & Services	4.1	3.8	4.5%	4.2%	18.5%	-21.5%
 Home & Building Supplies	3.6	0.5	11.0%	-2.0%	25.0%	-25.8%
 Books & Stationery Stores	3.8	3.3	-1.1%	-7.3%	-14.9%	2.6%
 Liquor Stores	1.6	0.7	19.9%	-16.0%	25.2%	22.6%
 Recreation & Entertainment	37.0	39.5	-3.7%	-2.4%	0.2%	20.6%
 Supermarkets & Food Retailers	29.6	4.3	-0.2%	-0.1%	27.9%	-0.5%
 Travel & Accommodation	119.5	73.5	-5.6%	-1.2%	0.9%	2.1%
 Total Retail Spend	222.4	165.2	-3.4%	-1.7%	4.7%	8.6%

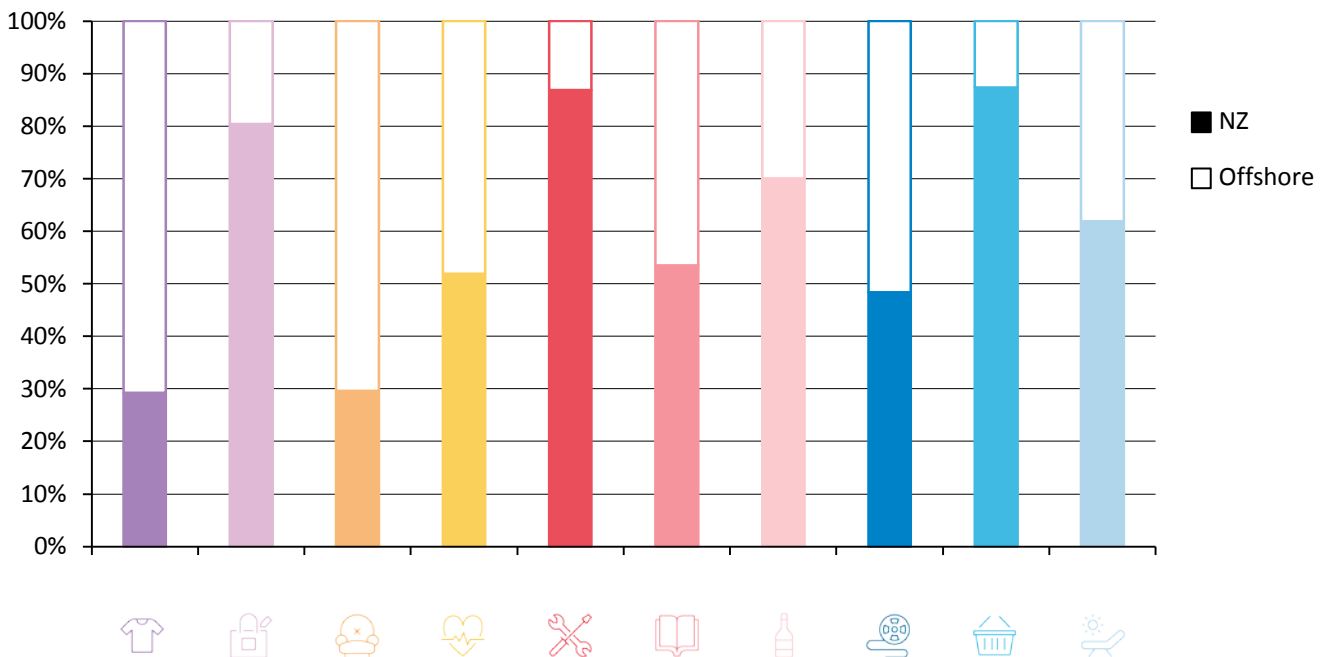
Online retailer total revenue by category (\$M)



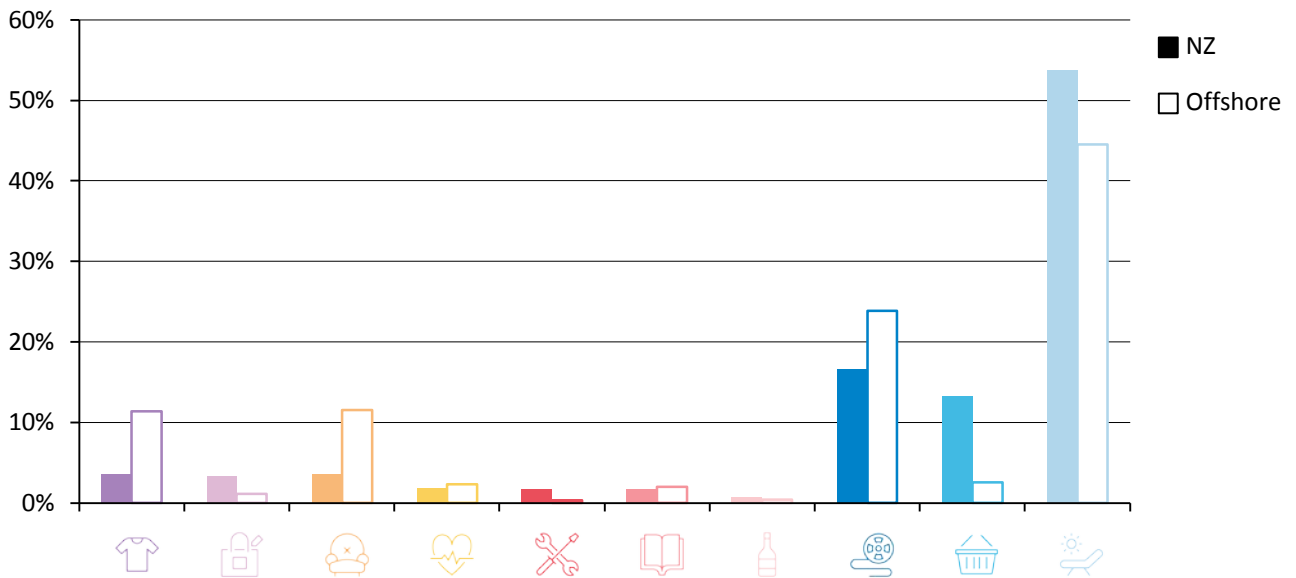
Monthly online revenue change year-on-year



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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