



Retailwatch














Value of electronic card transactions within retail categories

Period ending 28/06/2018

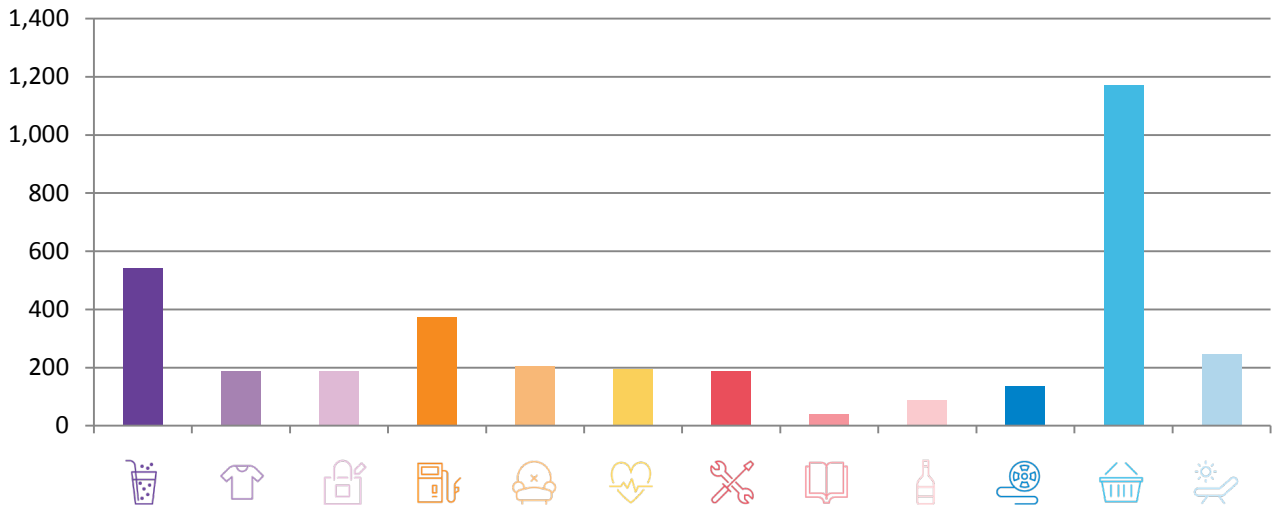
Total retail spend in New Zealand for the 28 days ending 28 June 2018 was \$3.6 billion. This was a decrease of 0.5% compared to May and increase of 0.2% when compared to the same period last year.

Spending was up in six categories year-on-year; Fuel & Service Stations saw the greatest increase with 9.2%, followed by the Liquor Stores category up 3.7%. Furniture, Appliances & Electronics saw no change year-on-year while the biggest decline was in the Books & Stationery Stores category, dropping 3.4%.

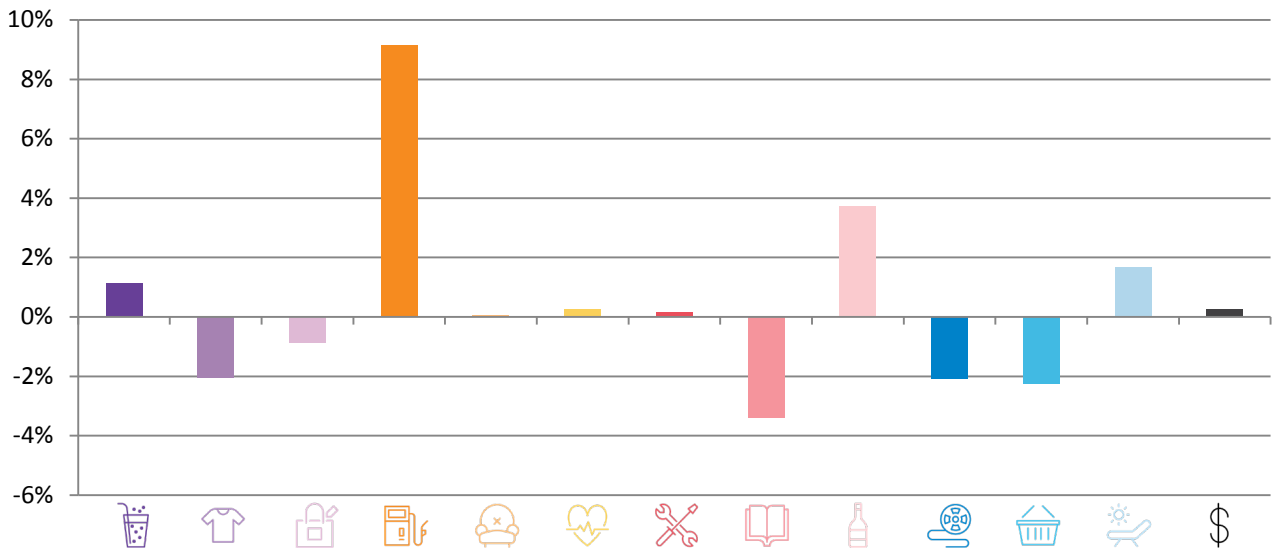
Month-on-month, five of the twelve categories experienced increases in spend with the largest increase seen in the Furniture, Appliances & Electronics category up 6.4%. The largest decrease in spending month-on-month was witnessed in the Health Goods & Services and Books & Stationery Stores categories, both down 4.1%.

| Retailer Category | Month Total \$M | % Change vs Prior Month | % Change vs Last Year | % Share |
|--|-----------------|-------------------------|-----------------------|-------------|
|  Cafés, Restaurants & Bars | 540 | -0.5% | 1.1% | 15.2% |
|  Clothing & Footwear | 187 | 2.7% | -2.1% | 5.3% |
|  Department Stores | 189 | 2.2% | -0.9% | 5.3% |
|  Fuel & Service Stations | 372 | 0.8% | 9.2% | 10.5% |
|  Furniture, Appliances & Electronics | 204 | 6.4% | 0.0% | 5.7% |
|  Health Goods & Services | 196 | -4.1% | 0.2% | 5.5% |
|  Home & Building Supplies | 89 | -0.1% | 0.1% | 5.3% |
|  Books & Stationery Stores | 39 | -4.1% | -3.4% | 1.1% |
|  Liquor Stores | 88 | 0.3% | 3.7% | 2.5% |
|  Recreation & Entertainment | 135 | -3.8% | -2.1% | 3.8% |
|  Supermarkets & Food Retailers | 1,171 | -1.2% | -2.2% | 32.9% |
|  Travel & Accommodation | 247 | -3.4% | 1.7% | 6.9% |
|  TOTAL RETAIL SPEND | 3,558 | -0.5% | 0.2% | 100% |

Monthly retail spend by category (\$M)



Change vs last year



Quarterly summary

June 2018













The total quarterly retail spend for the 91 days ending 28 June 2018 was \$11.6 billion. This was a decrease of 3.0% when compared to the previous quarter and a drop of 1.5% when compared to the same period last year.

Five of the twelve categories experienced increases in spend when compared to the previous quarter. The Clothing & Footwear category had the greatest rise in spending (+10.6%), this was followed by the Department Stores category with a 7.3% increase. The largest decrease in spend was seen in the Books & Stationery Stores category declining 14.0%, the Travel & Accommodation category wasn't far behind with a drop of 12.0% from last quarter.

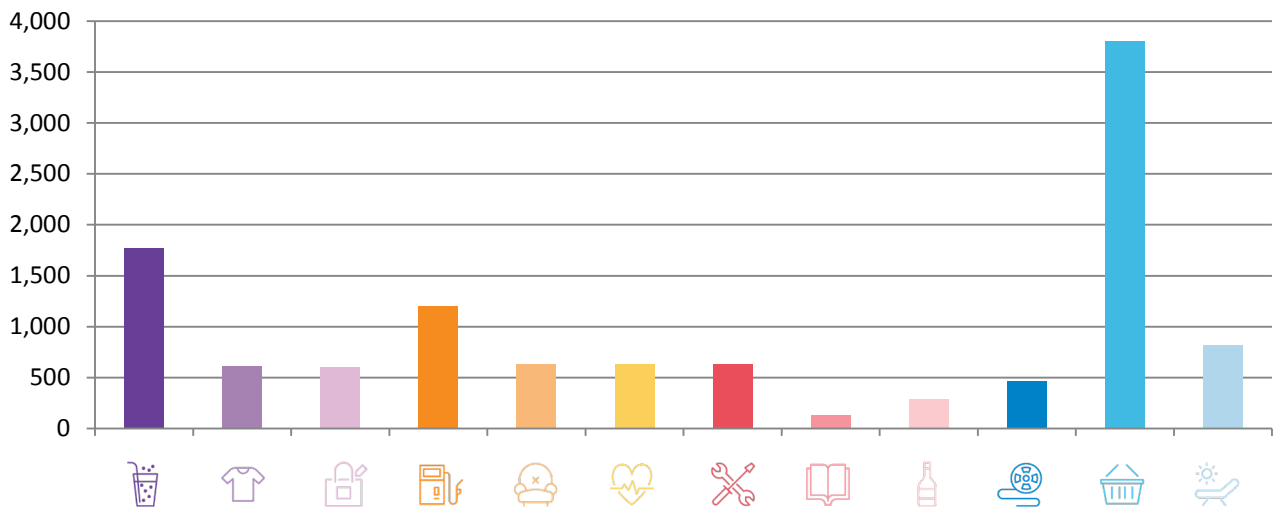
Compared to the same quarter of the previous year, spending increased in five of the twelve categories. The Fuel & Service Station category had the greatest increase of 4.6%. The largest decreases were seen in the Books & Stationery Stores and Department Stores categories down 7.3% and 5.2% respectively.

Quarterly summary

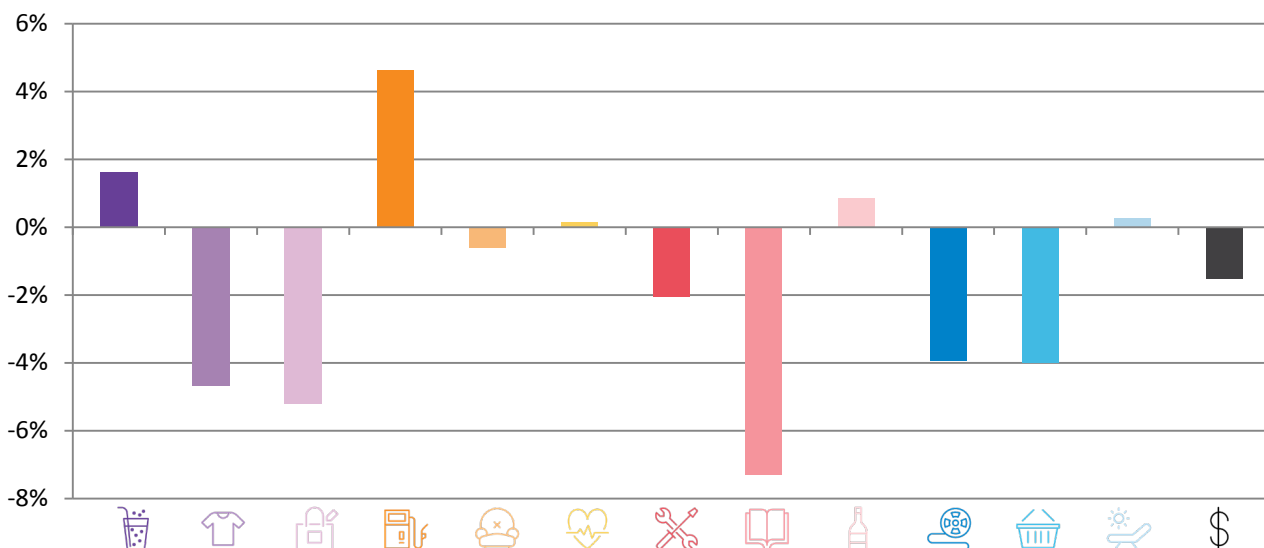
June 2018

| Retailer Category | Quarter Total \$M | % Change vs Prior Quarter | % Change vs Last Year | % Share |
|--|-------------------|---------------------------|-----------------------|-------------|
|  Cafés, Restaurants & Bars | 1,772 | 0.3% | 1.6% | 15.3% |
|  Clothing & Footwear | 607 | 10.6% | -4.7% | 5.2% |
|  Department Stores | 606 | 7.3% | -5.2% | 5.2% |
|  Fuel & Service Stations | 1,200 | -3.4% | 4.6% | 10.4% |
|  Furniture, Appliances & Electronics | 637 | 0.6% | -0.6% | 5.5% |
|  Health Goods & Services | 630 | 6.2% | 0.1% | 5.4% |
|  Home & Building Supplies | 630 | -6.3% | -2.0% | 5.4% |
|  Books & Stationery Stores | 127 | -14.0% | -7.3% | 1.1% |
|  Liquor Stores | 286 | -10.8% | 0.9% | 2.5% |
|  Recreation & Entertainment | 465 | -2.8% | -3.9% | 4.0% |
|  Supermarkets & Food Retailers | 3,807 | -5.8% | -4.0% | 32.9% |
|  Travel & Accommodation | 816 | -12.0% | 0.3% | 7.0% |
| \$ TOTAL RETAIL SPEND | 11,583 | -3.0% | -1.5% | 100% |

Quarterly spend by category (\$M)



Change vs last year



Selected regions of interest

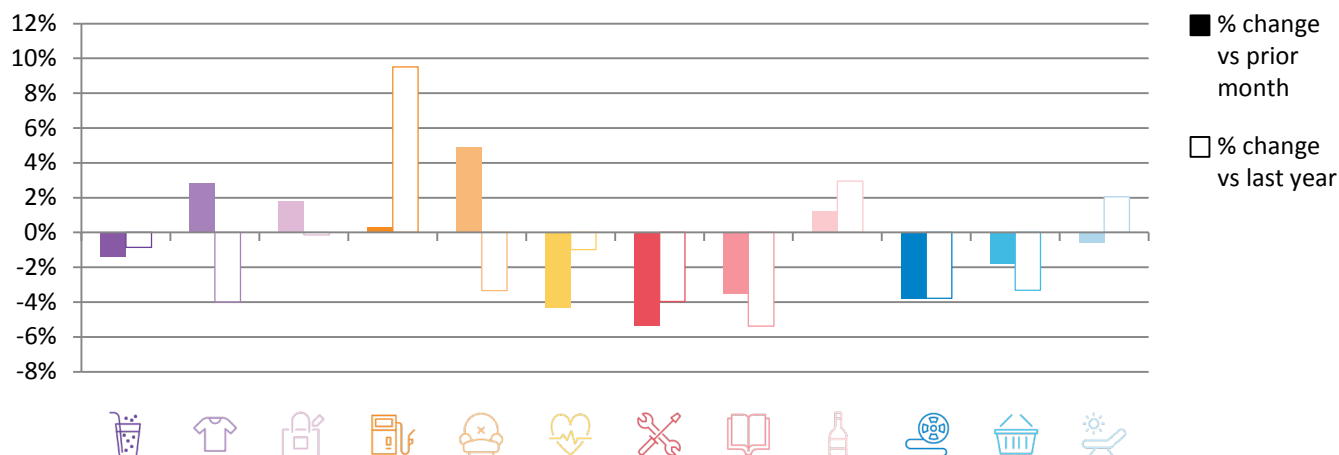
June 2018

Monthly trends Auckland

Retail spend in the Auckland region for the 28 days ending 28/06/2018 was \$1.3 billion. This represents a decrease in spend of 1.0% from the previous month and year-on-year.

Retail spending in the Auckland region was up in just three of the twelve categories compared to June last year. The greatest increase in year-on-year spend was seen in the Fuel & Service Stations category up 9.5%. The greatest drop in year-on-year spend was seen in Books & Stationery Stores category declining 5.4%.

Compared to May, five of the twelve categories experienced an increase in spend. The Furniture, Appliances & Electronics category increased by 4.9%, while the largest of the decreases were seen in the Home & Building Supplies and Health Goods & Services categories, down 5.4% and 4.3% respectively.

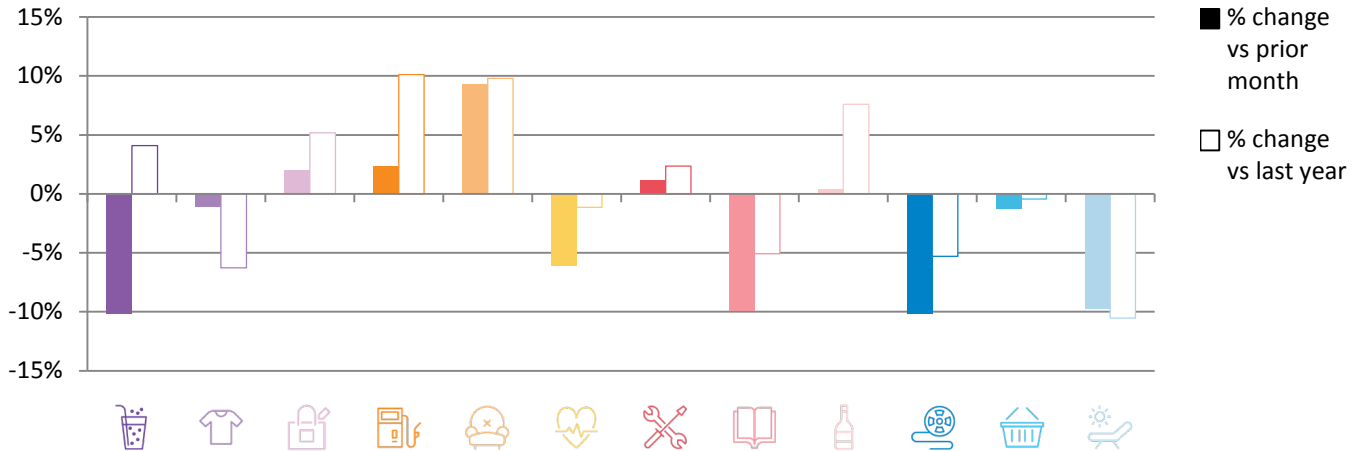


Monthly trends Hawke's Bay

Retail spend in the Hawke's Bay region for the 28 days ending 28/06/2018 was \$113 million. This represents a decrease of 2.5% against the previous month and an increase of 1.3% year-on-year.

Compared to June 2017, spending was up in six of the twelve categories, with Fuel & Service Stations up at 10.1% followed by the Furniture, Appliances & Electronics category increasing 9.8%. Spending was down by 10.5% in the Travel & Accommodation category.

Month-on-month spend was also up in five categories, with Furniture, Appliances & Electronics experiencing the largest increase in spend (+9.3%). Recreation & Entertainment and Cafés, Restaurants, & Bars categories had the greatest drop in spending since May, declining 10.2% and 10.1% respectively.

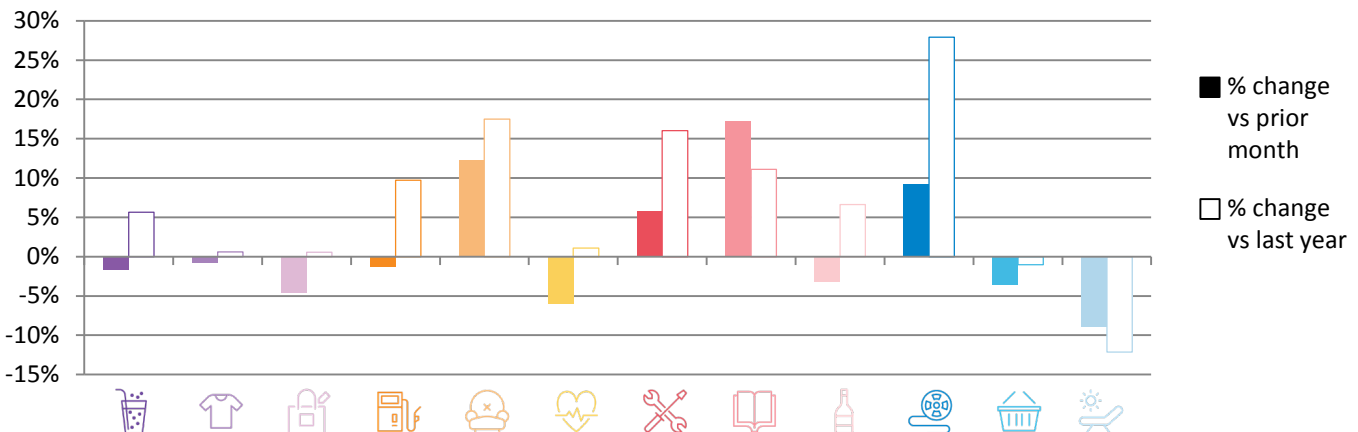


Monthly trends Tasman

Retail spend in the Tasman region for the 28 days ending 28/06/2018 was \$37.9 million. This represents a decrease of 1.5% against the previous month and an increase of 3.3% year-on-year.

Retail spending in the Tasman region increased in ten of the twelve categories year-on-year. The Recreation & Entertainment category saw the greatest increase in spend going up 27.9, this was followed by the Furniture, Appliances & Electronics increasing by 17.5% year-on-year. The biggest of the two decreases was seen in the Travel & Accommodation category down by 12.1%.

Compared to May, only four categories experienced increases in spend. The Books & Stationery Stores category was up 17.2% while the Travel & Accommodation category had the largest decrease, dropping 9.0%.



Going up this month

The greatest increase in spending this month was seen in the Furniture, Appliances & Electronics category, up 6.4%.

The Waikato and Southland regions experienced an equal increase this month of 1.1% when compared to May 2018.

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Categories up

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Regions up

Going down this month

The largest decrease in spending this month was seen in the Health Goods & Services and Books & Stationery Stores categories, both down 4.1%.

The Hawke's Bay region experienced the greatest decrease in spend this month, down 2.5%.

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Categories down

10

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 June 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 28/06/2018

Total online retail spend in New Zealand for the 28 days ending 28 June 2018 was \$426.2 million. This represents an increase of 5.4% year-on-year and a decrease of 2.9% against the previous month.

Online spending was up in nine of the ten categories year-on-year. Home & Building Supplies retailers saw the greatest increase in spending, up a whopping 62.8%. The Health Goods & Services category exhibited the only decrease in spend, declining 8.1%.

Month-on-month, five of the ten categories experienced increases in spend. The greatest increase in spend was also exhibited in the Home & Building Supplies retailers category up 52.6%. The largest drop in month-on-month spend was in the Furniture, Appliances & Electronics category, down 15.0%.

| Online Retailer Category | Month Total \$M | % Change vs Prior Month | % Change vs Last Year | % Share |
|--|-----------------|-------------------------|-----------------------|-------------|
|  Clothing & Footwear | 29.6 | -1.1% | 8.6% | 7.0% |
|  Department Stores | 10.0 | -1.5% | 12.8% | 2.3% |
|  Furniture, Appliances & Electronics | 27.7 | -15.0% | 7.0% | 6.5% |
|  Health Goods & Services | 8.1 | -7.6% | -8.1% | 1.9% |
|  Home & Building Supplies | 6.6 | 52.6% | 62.8% | 1.6% |
|  Books & Stationery Stores | 8.5 | 4.1% | 5.0% | 2.0% |
|  Liquor Stores | 3.1 | 5.9% | 3.1% | 0.7% |
|  Recreation & Entertainment | 83.7 | 0.9% | 2.1% | 19.6% |
|  Supermarkets & Food Retailers | 37.5 | 1.4% | 16.6% | 8.8% |
|  Travel & Accommodation | 211.3 | -4.8% | 3.4% | 49.6% |
|  Total Online Retail Spend | 426.2 | -2.9% | 5.4% | 100% |

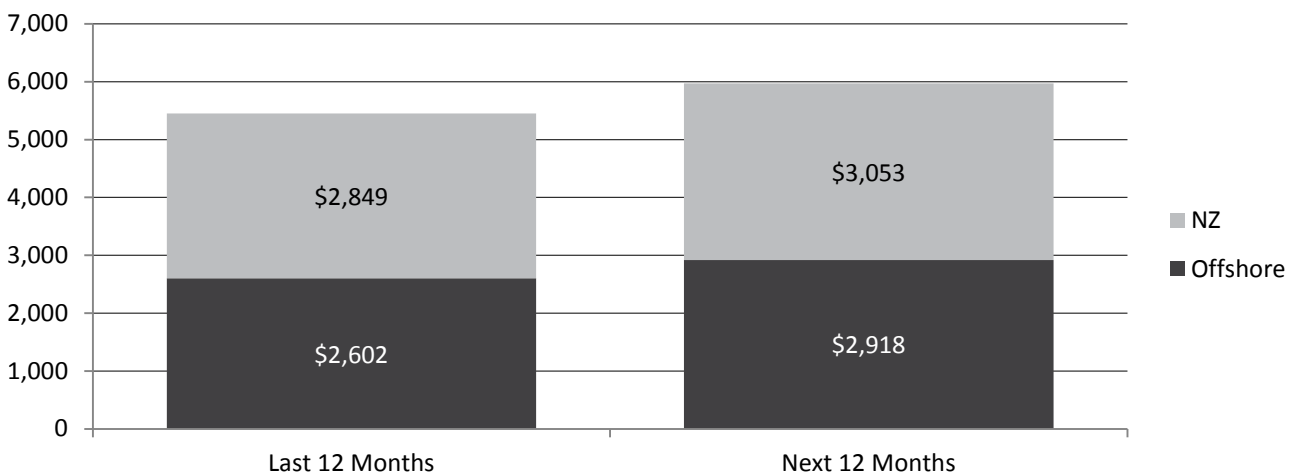
Online: New Zealand vs Offshore

New Zealand merchants accounted for 52% of online spend for the month of June. This was a decrease of 2.0% compared to the previous month and an increase of 5.2% compared to the previous year.

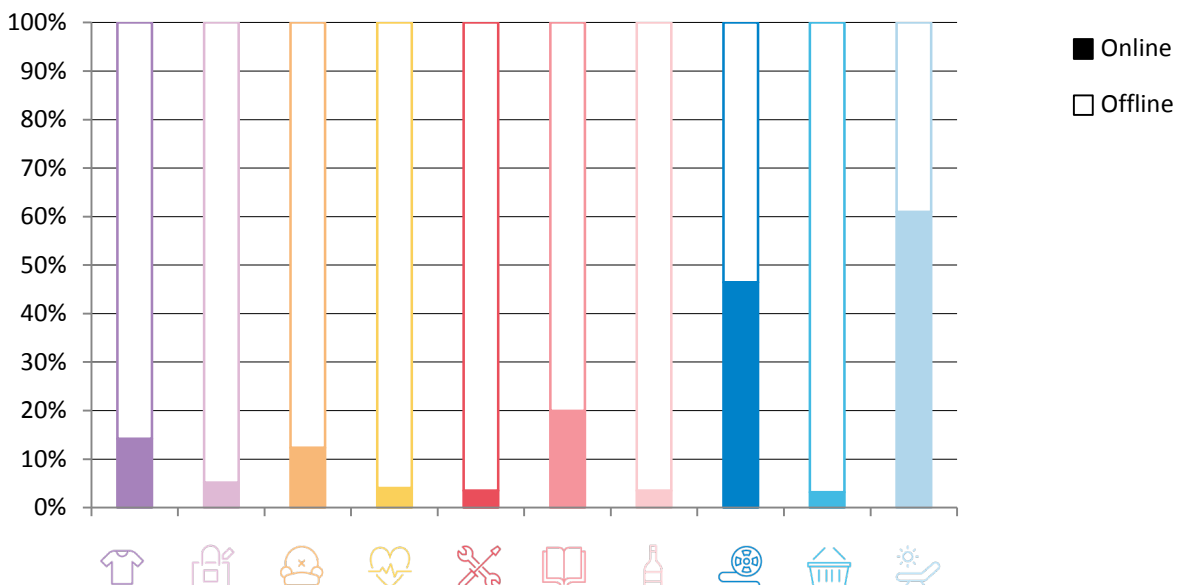
For New Zealand merchants, five of the ten categories saw increases in spend compared to May, with the Home & Building Supplies category experiencing the greatest increase in spend, going up 77.2%. Furniture, Appliances & Electronics saw the biggest decrease in online spend, dropping 23.8%. New Zealand merchants saw increases in just three categories when compared to June 2017.

Spend at offshore retail decreased by 3.8% when compared to the previous month but increased by 5.5% when compared to the same period last year. Offshore merchants saw increases in spend in six categories year-on-year, the largest seen in Department Stores (+58.5%), while the greatest decrease was seen in the Liquor Stores category, down 24.0%.

Projected total online spend (\$M)














% share of category spend

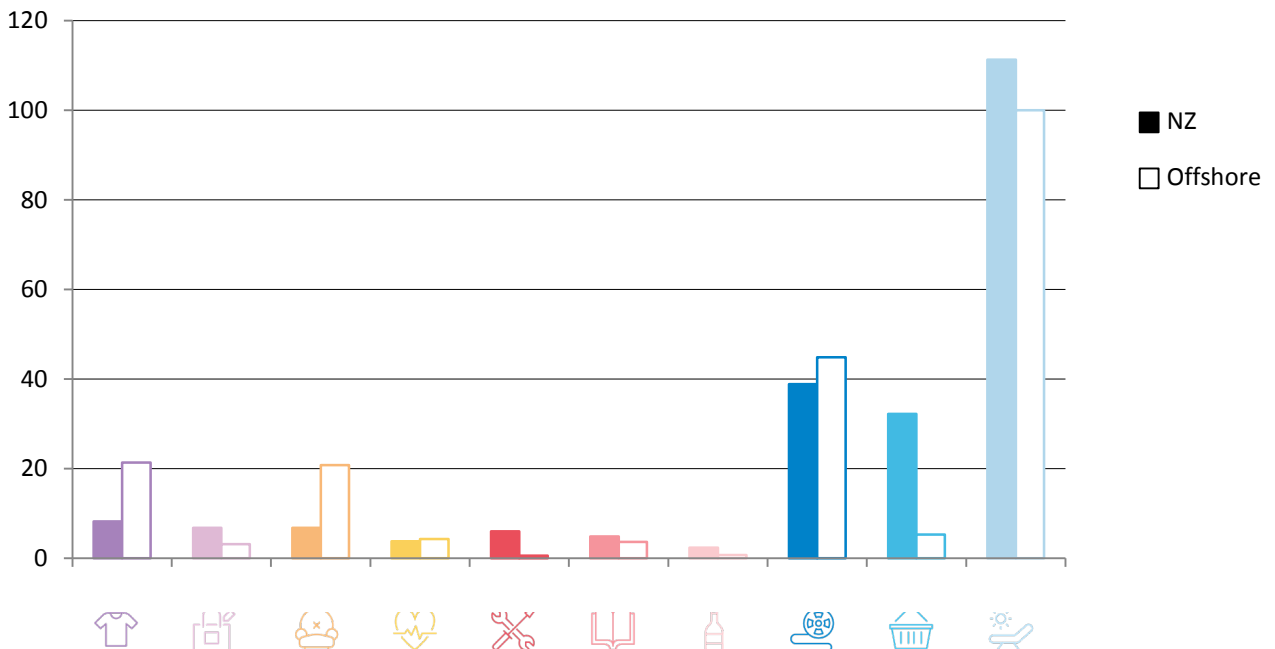


Online retail market summary New Zealand vs Offshore merchants

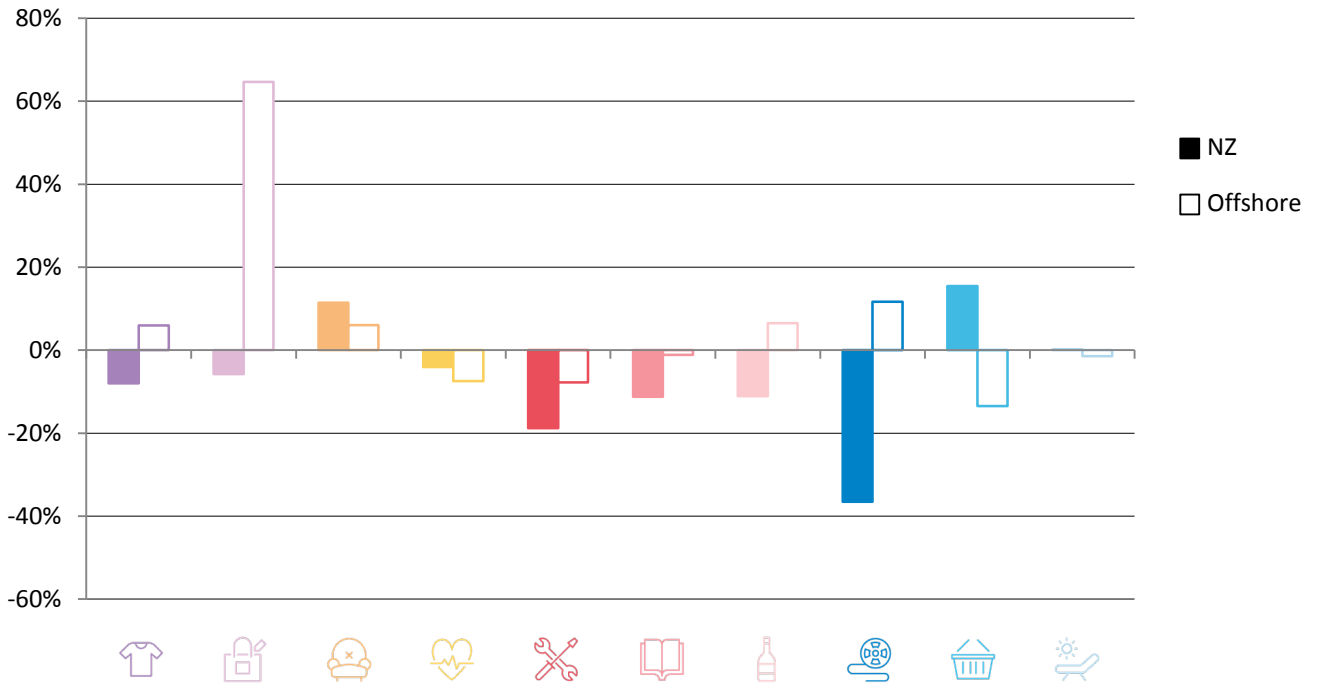
June 2018

| Retailer Category | Month Total \$M | | % Change vs Prior Month | | % Change vs Last Year | |
|--|-----------------|--------------|-------------------------|--------------|-----------------------|-------------|
| | NZ | Offshore | NZ | Offshore | NZ | Offshore |
|  Clothing & Footwear | 8.2 | 21.4 | -2.0% | -0.7% | -0.6% | 12.6% |
|  Department Stores | 6.8 | 3.2 | -10.1% | 23.8% | -0.7% | 58.5% |
|  Furniture, Appliances & Electronics | 6.8 | 20.8 | -23.8% | -11.7% | 3.8% | 8.0% |
|  Health Goods & Services | 3.8 | 4.3 | 0.6% | -13.9% | -9.8% | -6.6% |
|  Home & Building Supplies | 6.0 | 0.6 | 77.2% | -36.0% | 82.2% | -20.9% |
|  Books & Stationery Stores | 4.9 | 3.7 | 3.2% | 5.4% | 1.9% | 9.4% |
|  Liquor Stores | 2.3 | 0.8 | 18.6% | -20.6% | 16.5% | -24.0% |
|  Recreation & Entertainment | 38.9 | 44.8 | -0.4% | 2.1% | -4.6% | 8.6% |
|  Supermarkets & Food Retailers | 32.2 | 5.3 | 2.1% | -2.5% | 22.1% | -8.4% |
|  Travel & Accommodation | 111.3 | 100.0 | -4.4% | -5.3% | 3.9% | 2.9% |
|  Total Retail Spend | 221.3 | 204.9 | -2.0% | -3.8% | 5.2% | 5.5% |

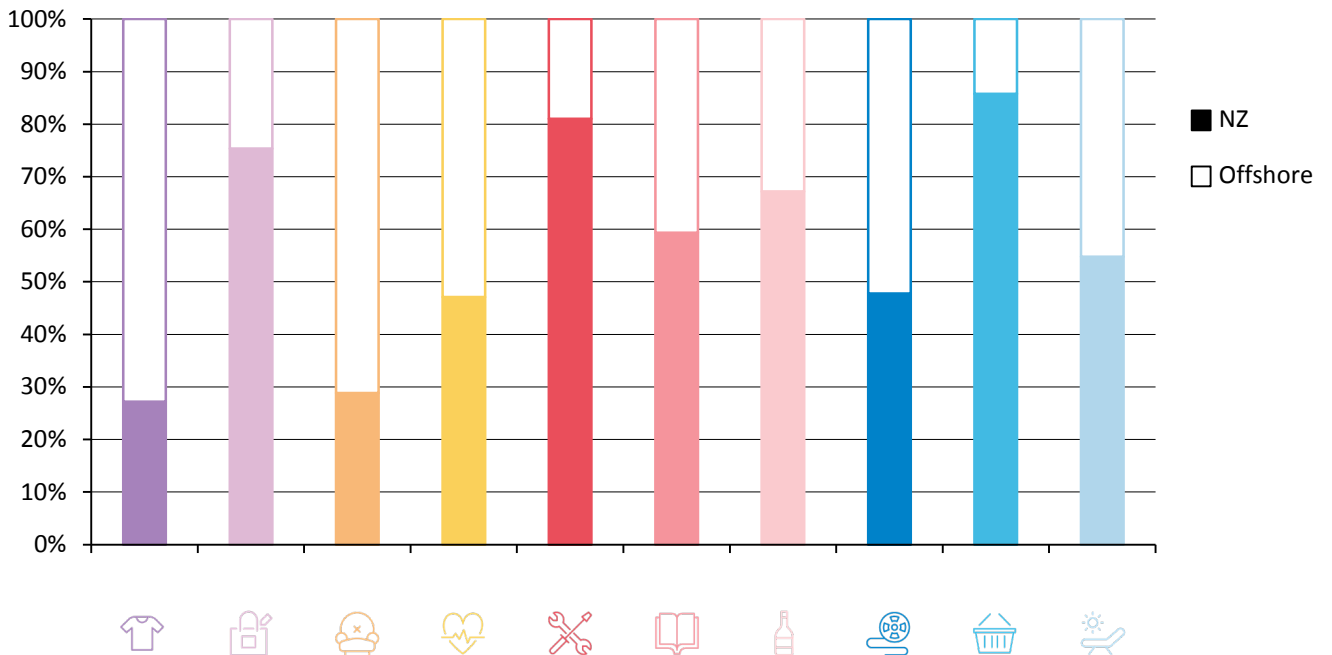
Online retailer total revenue by category (\$M)



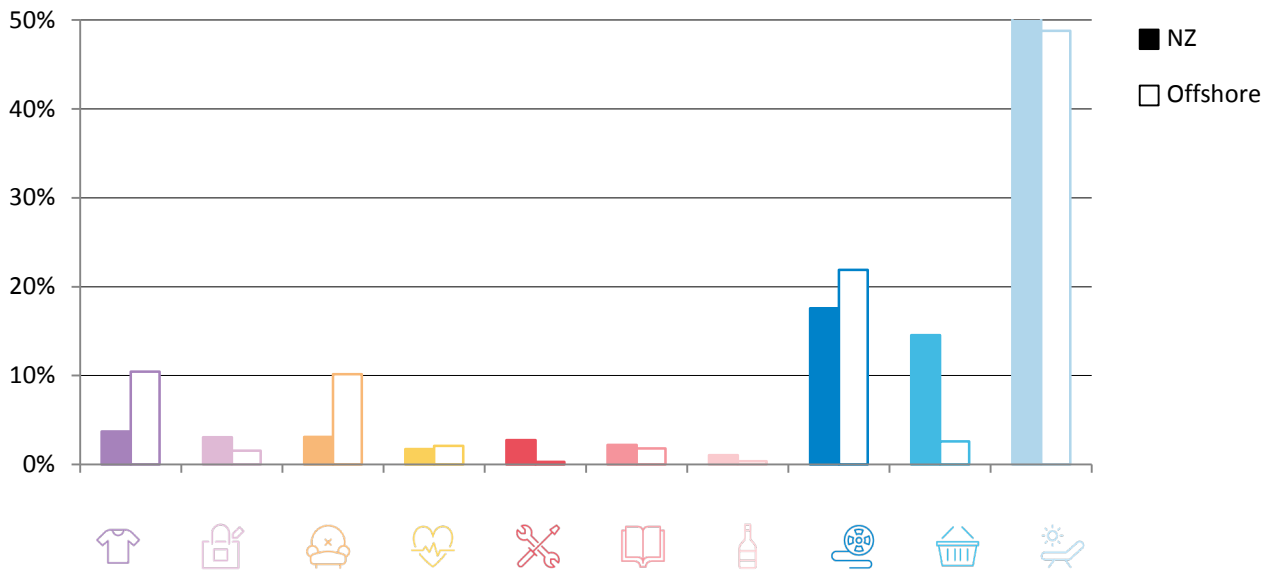
Monthly online revenue change year-on-year



Share of online spend within categories



Share of online spend between categories



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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