



Retailwatch














Value of electronic card transactions within retail categories

Period ending 28/04/2018

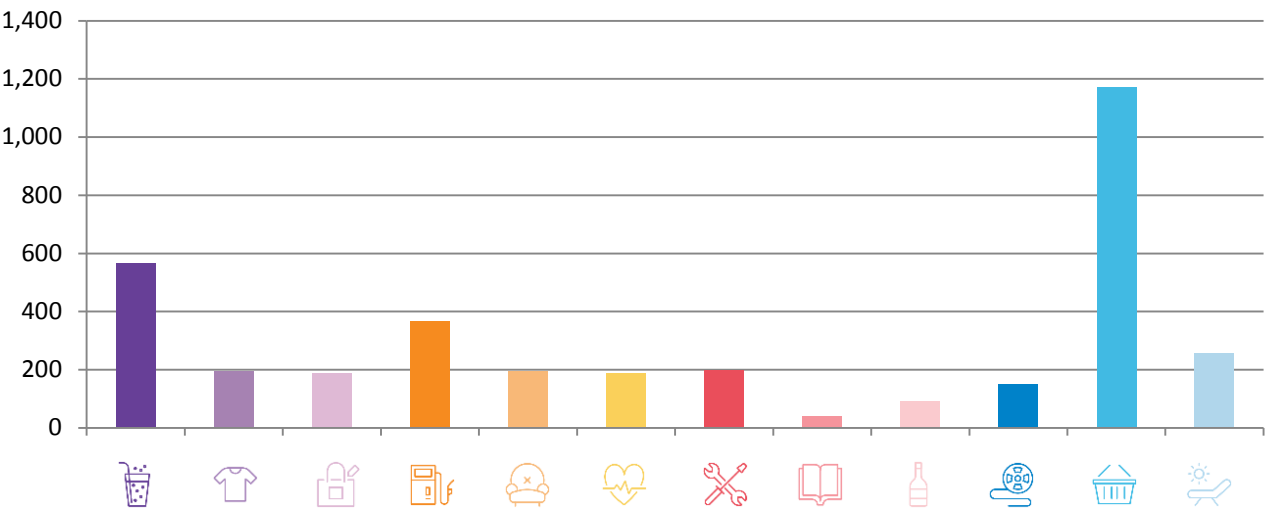
Total retail spend in New Zealand for the 28 days ending 28 April 2018 was \$3.6 billion. This was an decrease of 2.2% compared to March and 2.3% when compared to the same period last year.

Spending was up in only three categories year-on-year; the Cafés, Restaurants & Bars category saw the greatest increase with 3.5%. The greatest decreases were seen in the Department Stores and Supermarkets & Food Retailers categories, decreasing by 7.0% and 6.0% respectively.

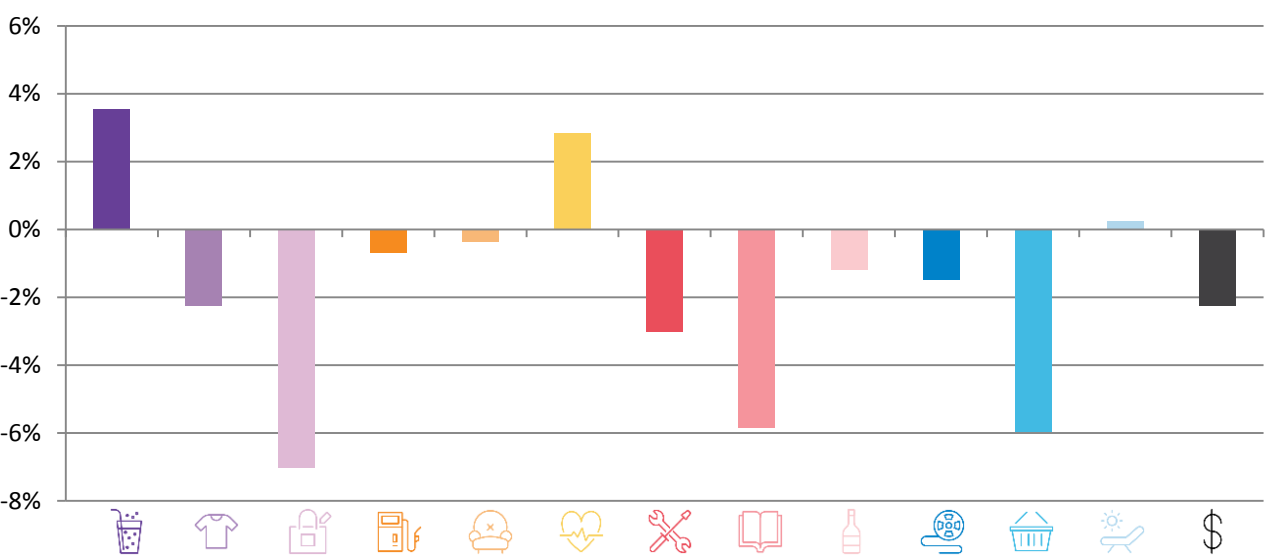
Month-on-month, four of the twelve categories experienced increases in spend with the largest increase seen in the Clothing & Footwear category (+10.2%). The largest decrease in spend month-on-month was seen in Health Goods & Services, dropping by 7.9%.

Retailer Category	Month Total \$M	% Change vs Prior Month	% Change vs Last Year	% Share
 Cafés, Restaurants & Bars	565	1.9%	3.5%	15.7%
 Clothing & Footwear	194	10.2%	-2.2%	5.4%
 Department Stores	187	9.0%	-7.0%	5.2%
 Fuel & Service Stations	365	-3.8%	-0.7%	10.2%
 Furniture, Appliances & Electronics	193	-0.3%	-0.4%	5.4%
 Health Goods & Services	188	-7.9%	2.8%	5.2%
 Home & Building Supplies	199	-4.7%	-3.0%	5.6%
 Books & Stationery Stores	38	-4.4%	-5.8%	1.1%
 Liquor Stores	90	-5.0%	-1.2%	2.5%
 Recreation & Entertainment	148	8.0%	-1.5%	4.1%
 Supermarkets & Food Retailers	1,169	-5.4%	-6.0%	32.6%
 Travel & Accommodation	255	-7.8%	0.2%	7.1%
 TOTAL RETAIL SPEND	3,592	-2.2%	-2.3%	100%

Monthly retail spend by category (\$M)



Change vs last year



Quarterly summary

April 2018














The total quarterly retail spend for the 91 days ending 28 April 2018 was \$11.89 billion. This was a decrease of 8.1% when compared to the previous quarter and almost no change 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 8.5% while Health Goods & Services only saw a rise of 3.3%. The largest decreases in spend were seen in the Department Stores category (-30.9%), followed by Books & Stationery Stores (-24.8%).

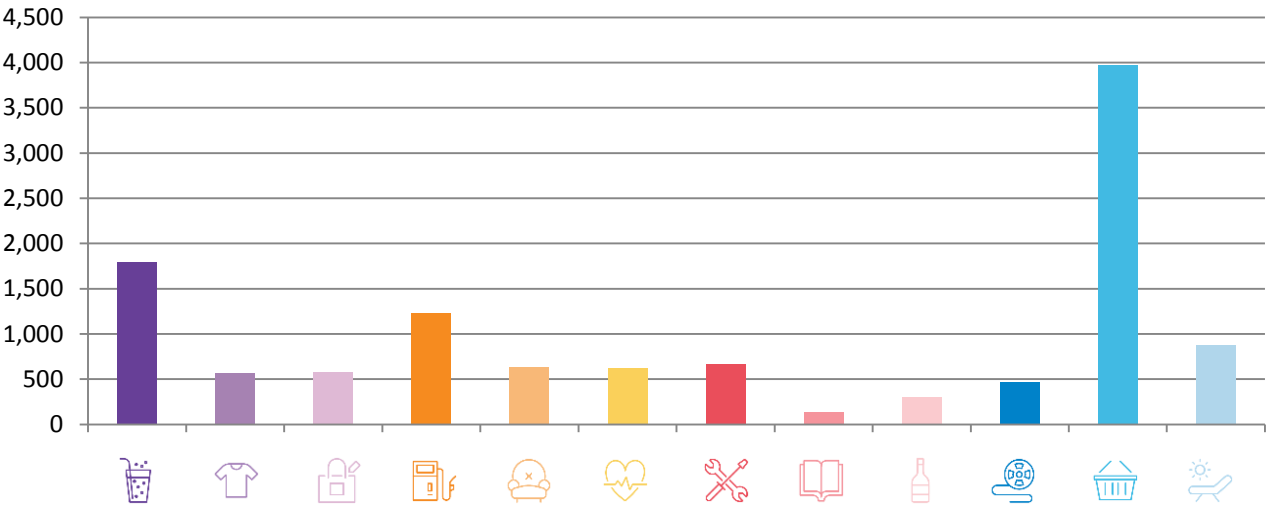
Compared to the same quarter of the previous year, spending increased in six of the twelve categories. Cafés, Restaurants & Bars and Liquor Stores saw respective increases of 3.5% and 2.4%, while Books & Stationery Stores saw the greatest category decrease at -7.2%.

Quarterly summary

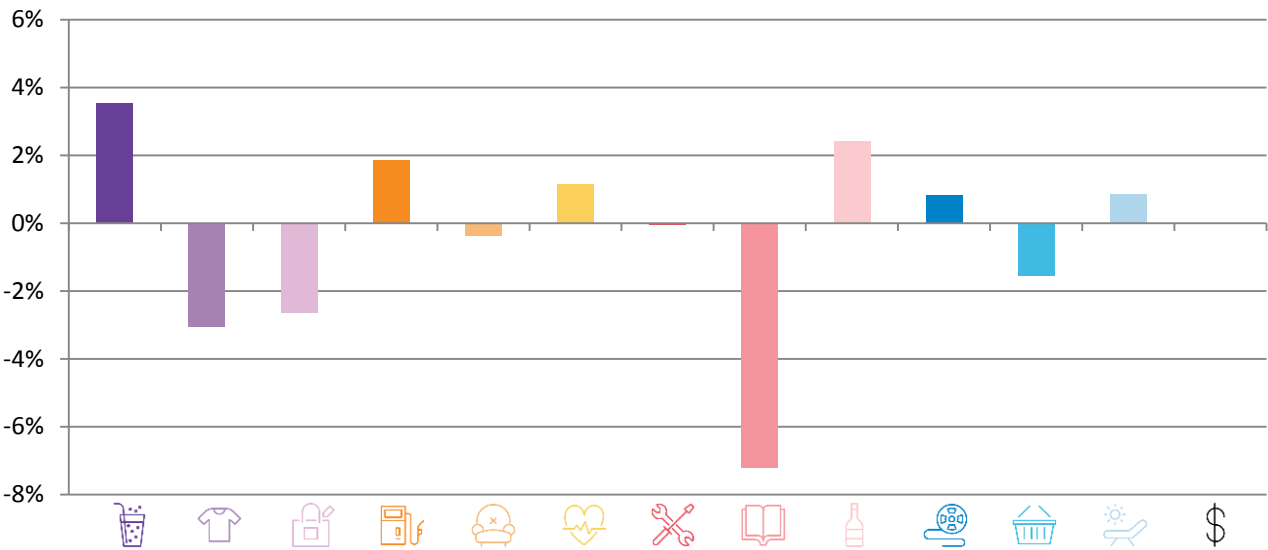
April 2018

Retailer Category	Quarter Total \$M	% Change vs Prior Quarter	% Change vs Last Year	% Share
 Cafés, Restaurants & Bars	1,795	-0.9%	3.5%	15.1%
 Clothing & Footwear	572	-18.2%	-3.1%	4.8%
 Department Stores	575	-30.9%	-2.6%	4.8%
 Fuel & Service Stations	1,230	-2.7%	1.9%	10.4%
 Furniture, Appliances & Electronics	632	-19.2%	-0.4%	5.3%
 Health Goods & Services	624	3.3%	1.1%	5.3%
 Home & Building Supplies	663	-16.0%	0.0%	5.6%
 Books & Stationery Stores	136	-24.8%	-7.2%	1.1%
 Liquor Stores	307	-15.9%	2.4%	2.6%
 Recreation & Entertainment	467	-6.9%	0.8%	3.9%
 Supermarkets & Food Retailers	3,973	-6.5%	-1.6%	33.5%
 Travel & Accommodation	885	8.5%	0.8%	7.5%
 TOTAL RETAIL SPEND	11,857	-8.1%	0.0%	100%

Quarterly spend by category (\$M)



Change vs last year



Selected regions of interest

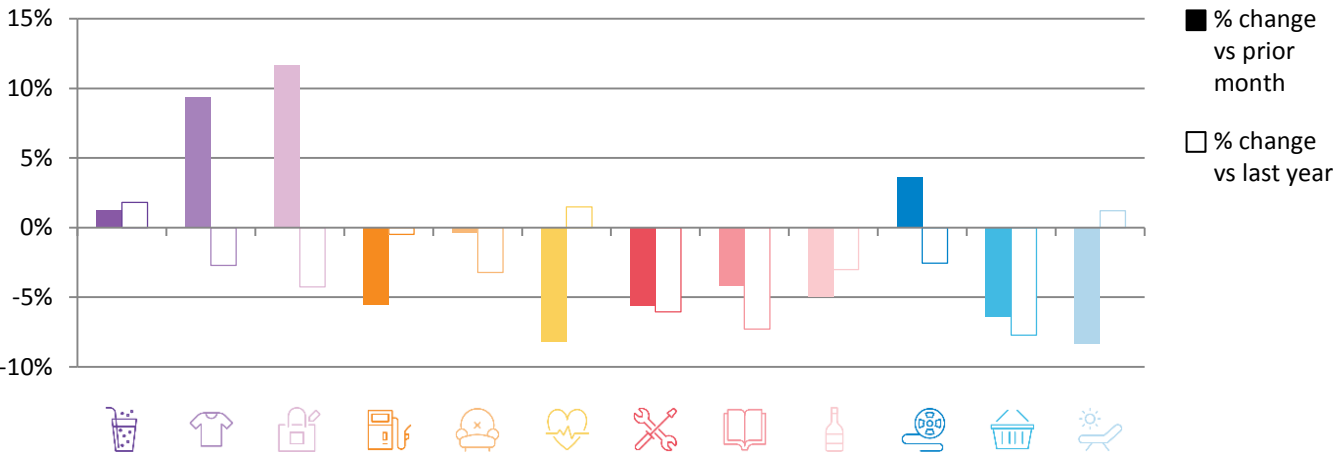
April 2018

Monthly trends Auckland

Retail spend in the Auckland region for the 28 days ending 28/04/2018 was \$1.3 billion. This represents decreases of 2.9% from the previous month and 3.1% year-on-year.

Retail spending in the Auckland region was up in only three of the twelve categories compared to April last year. The greatest increase in year-on-year spend was seen in the Cafés, Restaurants, & Bars category at 1.8%. The greatest reduction in year-on-year spend was seen in Supermarkets & Food Retailers (-7.7%) closely followed by Books & Stationery Stores, down 7.3%.

Compared to March, four categories experienced an increase in spend. The greatest of these increases was exhibited in Department Stores, with a rise of 11.7%. Decreases were seen in the Travel & Accommodation category, down 8.3%, with Health Goods & Services right behind with a decrease of 8.2%.

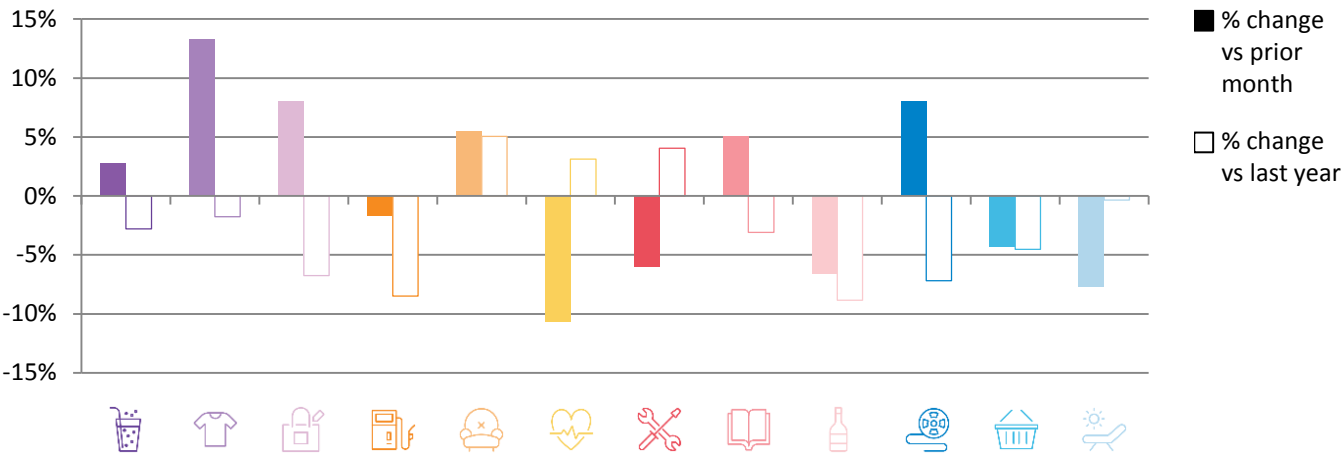


Monthly trends Southland

Retail spend in the Southland region for the 28 days ending 28/04/2018 was \$70.4 million. This represents a decrease of 1.3% against the previous month and a decrease of 3.6% year-on-year.

Compared to April 2017, spending was up in only three categories, with Furniture, Appliances & Electronics (+5.1%) experiencing the largest increase in spend. Spending was down in the Liquor Stores and Fuel & Service Stations categories, down 8.8% and 8.5% respectively.

Month-on-month spend was up in six categories, with Clothing & Footwear (+13.3%) experiencing the largest increase in spend, followed by Department Stores and Recreation & Entertainment, both up 8.0%. Health Goods & Services experienced the greatest decrease, down 14.2%

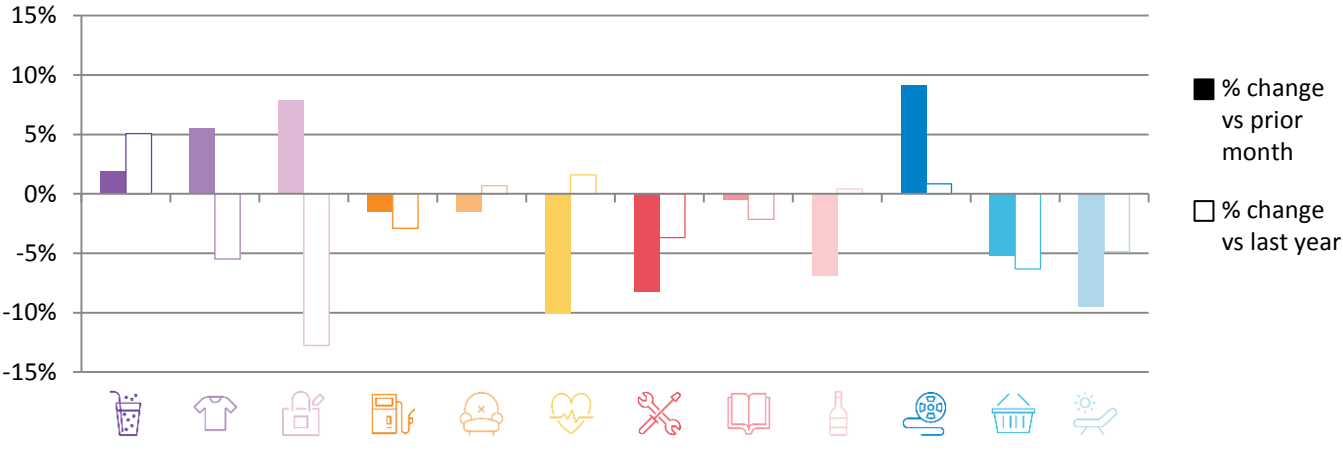


Monthly trends Wellington

Retail spend in the Wellington region for the 28 days ending 28/04/2018 was \$3.9 million. This represents a decrease of 2.7% against the previous month and a decrease of 3.1% year-on-year.

Retail spending in the Wellington region increased in five of the twelve categories year-on-year. Cafés, Restaurants, & Bars experienced the greatest increase in spend going up 5.1%. The biggest decline was seen in the Department Stores category down 12.7%.

Compared to March, only four categories experienced increases in spend. The Recreation & Entertainment category was up 9.1% with Department Stores following with a 7.9% increase. While the Health Goods & Services and Travel & Accommodation categories saw drops of 10.1% and 9.5% respectively.



Going up this month

The greatest increase in spending this month was seen in the Clothing & Footwear category, up 10.2%.

Marlborough was the only region to experience an increase month-on-month, up 0.1%.

Going down this month

The largest decrease in spending this month was seen in the Health Goods & Services category, down 7.9%.

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

4

Categories up

1

Regions up

8

Categories down

14

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 28/04/2018

Total online retail spend in New Zealand for the 28 days ending 28 April 2018 was \$404.1 million. This represents an increase of 4.5% year-on-year and a decrease of 4.5% against the previous month.

Online spending was up in seven of the ten categories year-on-year. Department stores saw the greatest increase in spending, up 24.3%, followed by Supermarkets & Food Retailers increasing 19.8%. The Health Goods & Services category exhibited the greatest decrease in spend, declining 11.4%.

Month-on-month, only three of the ten categories experienced increases in spend. The greatest increase in spend was exhibited in the Department Stores category up 8.7%. While the largest decreases were seen in the Liquor Store category (-13.1%) and Furniture, Appliances & Electronics category (-11.1%).

Online Retailer Category		Month Total \$M	% Change vs Prior Month	% Change vs Last Year	% Share
	Clothing & Footwear	29	2.0%	9.2%	7.1%
	Department Stores	11	8.7%	24.3%	2.7%
	Furniture, Appliances & Electronics	28	-11.1%	12.3%	6.9%
	Health Goods & Services	8	-6.1%	-11.4%	2.0%
	Home & Building Supplies	4	-8.6%	18.9%	0.9%
	Books & Stationery Stores	7	-2.3%	-3.5%	1.8%
	Liquor Stores	2	-13.1%	3.4%	0.5%
	Recreation & Entertainment	81	0.7%	8.2%	20.2%
	Supermarkets & Food Retailers	34	-3.5%	19.8%	8.3%
	Travel & Accommodation	200	-6.9%	-0.5%	49.6%
	Total Online Retail Spend	404	-4.5%	4.5%	100%

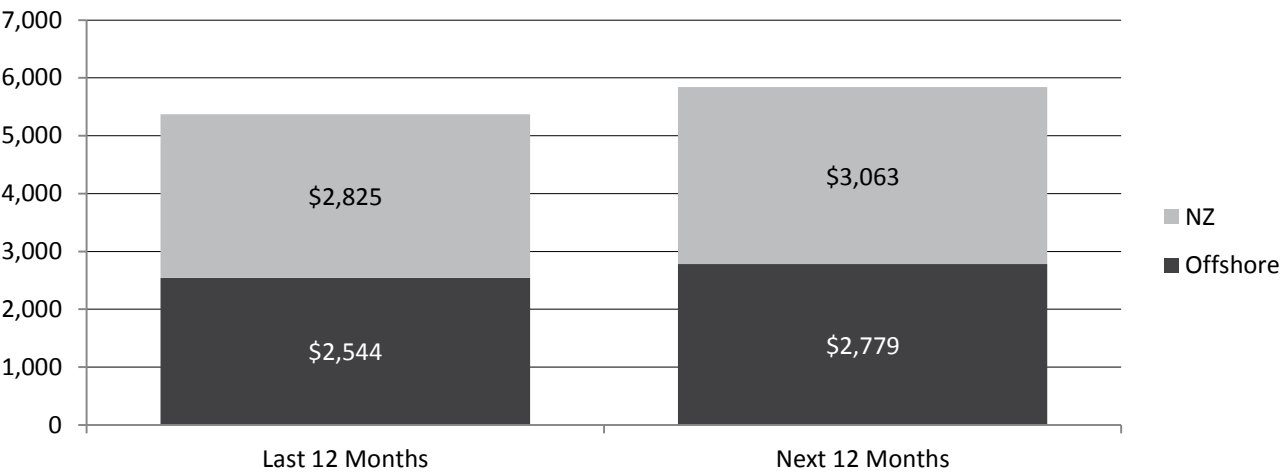
Online: New Zealand vs Offshore

New Zealand merchants accounted for 52% of online spend for the month of April. This was an decrease of 5.3% compared to the previous month and an increase of 5.0% compared to the previous year.

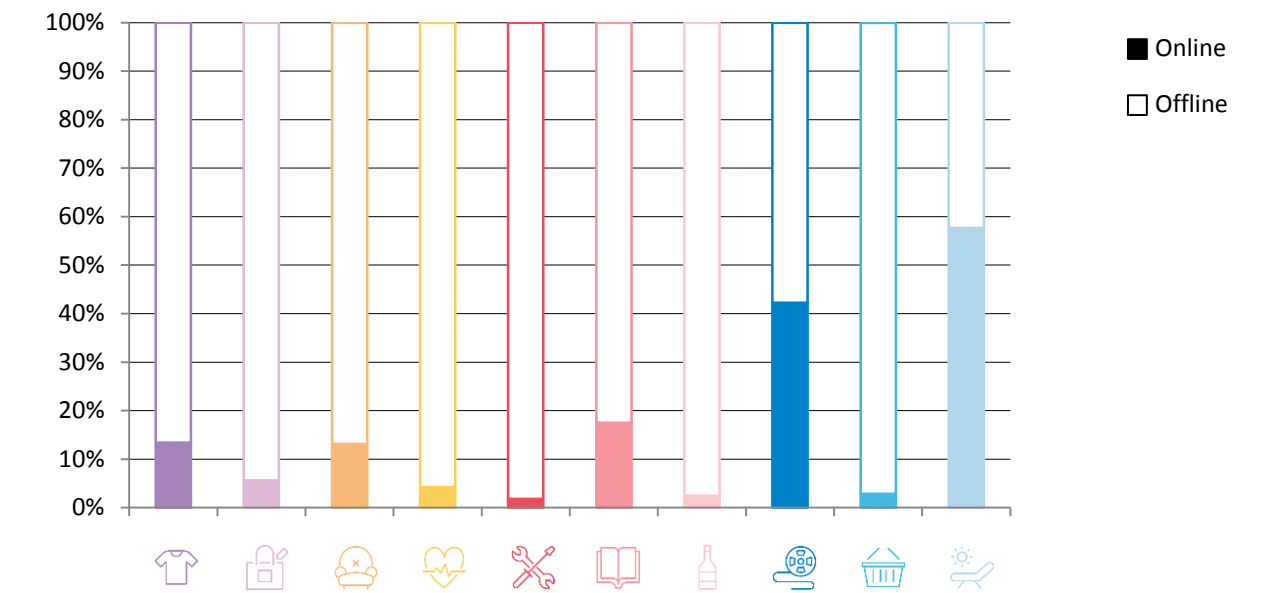
For New Zealand merchants, four of the ten categories saw increases in spend compared to March, with Books & Stationery Stores experiencing the greatest increase in spend, going up 11.0%, this was followed by the Department Stores category, increasing 10.4%. Liquor Stores saw the biggest decrease in online spend, dropping 15.3%. New Zealand merchants saw increases in eight categories when compared to April 2017.

Spend at offshore retail decreased by 3.6% when compared to the previous month but increased by 4.1% 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 (+80.1%), while the greatest decrease was seen in the Health Goods & Services category, down 32.4%.

Projected total online spend (\$M)














% share of category spend

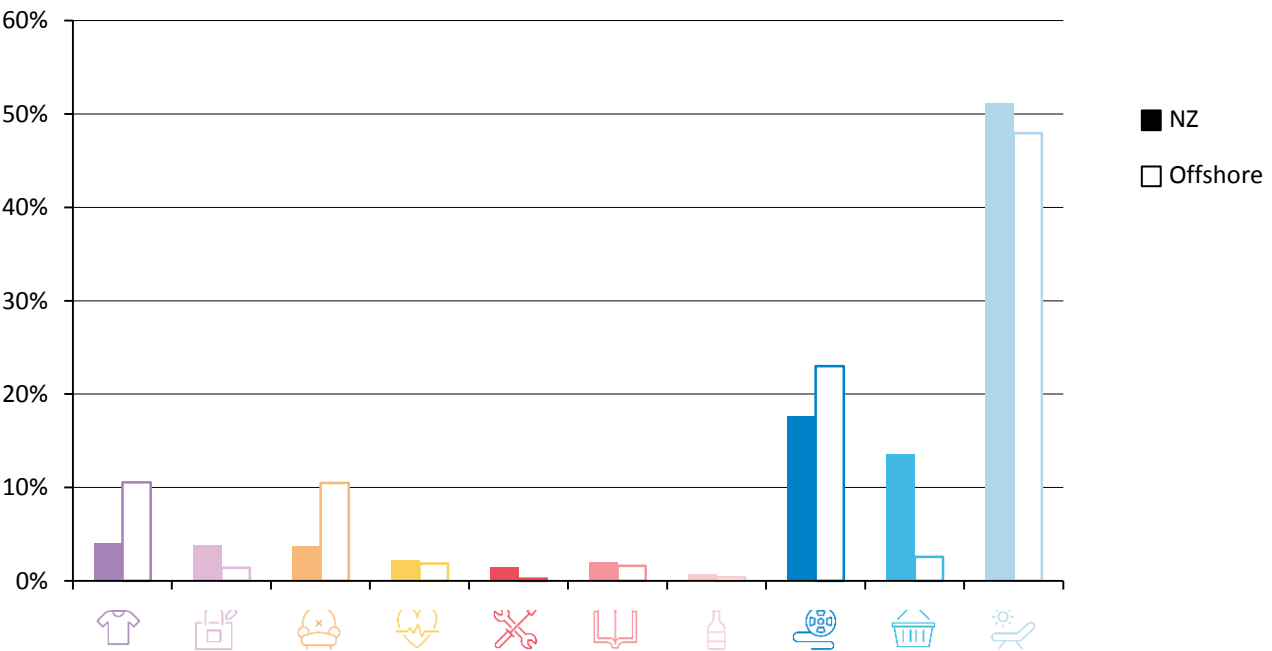


Online retail market summary New Zealand vs Offshore merchants

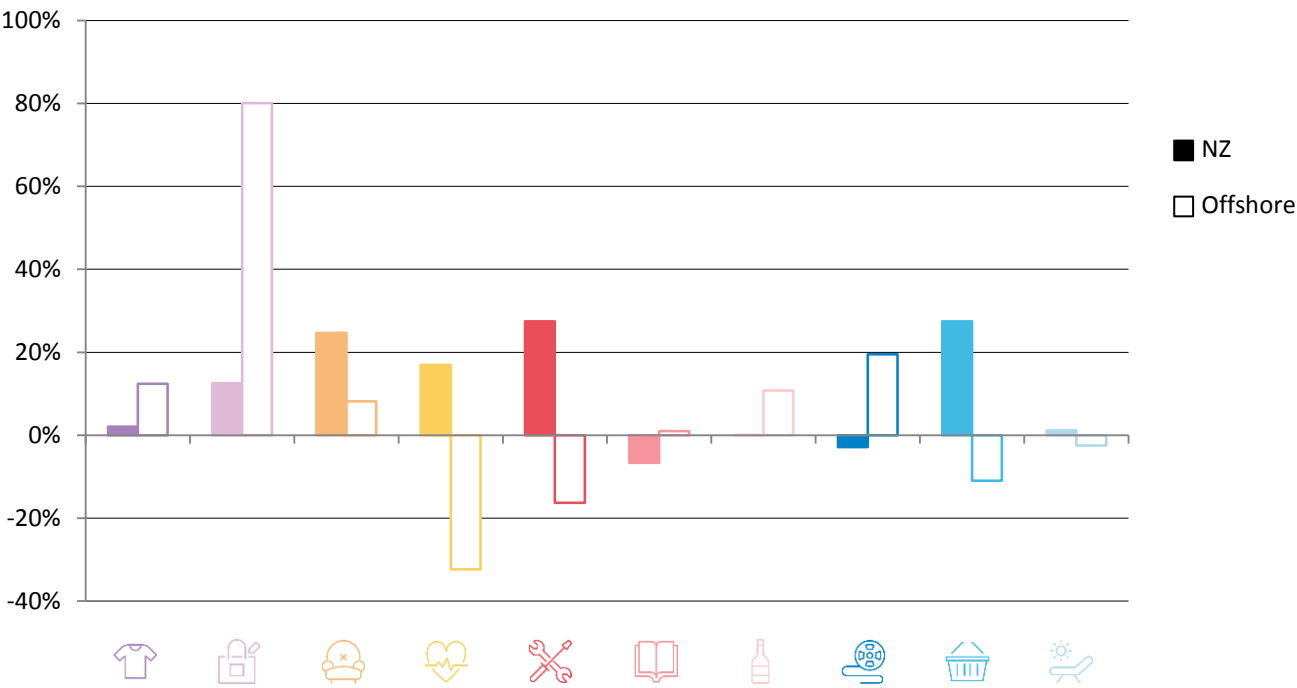
April 2018

Retailer Category	Month Total \$M		% Change vs Prior Month		% Change vs Last Year	
	NZ	Offshore	NZ	Offshore	NZ	Offshore
 Clothing & Footwear	8.4	20.4	7.8%	-0.2%	2.0%	12.4%
 Department Stores	8.0	2.7	10.4%	4.2%	12.5%	80.1%
 Furniture, Appliances & Electronics	7.8	20.3	-10.5%	-11.4%	24.7%	8.2%
 Health Goods & Services	4.6	3.6	9.2%	-20.4%	17.0%	-32.4%
 Home & Building Supplies	3.1	0.5	-3.0%	-32.8%	27.4%	-16.3%
 Books & Stationery Stores	4.1	3.1	11.0%	-15.6%	-6.6%	1.0%
 Liquor Stores	1.5	0.7	-15.3%	-8.5%	0.1%	10.8%
 Recreation & Entertainment	37.0	44.5	-0.5%	1.7%	-2.9%	19.5%
 Supermarkets & Food Retailers	28.6	4.9	-2.7%	-8.0%	27.4%	-11.0%
 Travel & Accommodation	107.7	92.7	-9.8%	-3.3%	1.2%	-2.4%
 Total Retail Spend	210.7	193.4	-5.3%	-3.6%	5.0%	4.1%

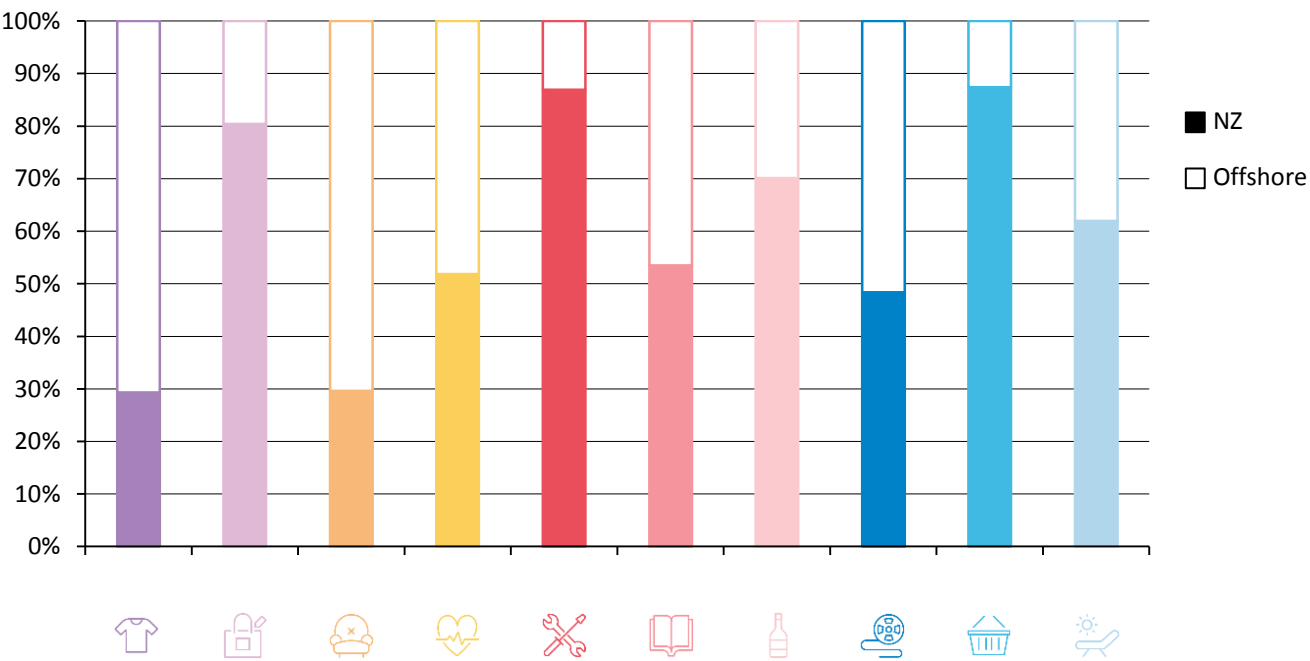
Online retailer total revenue by category (\$M)



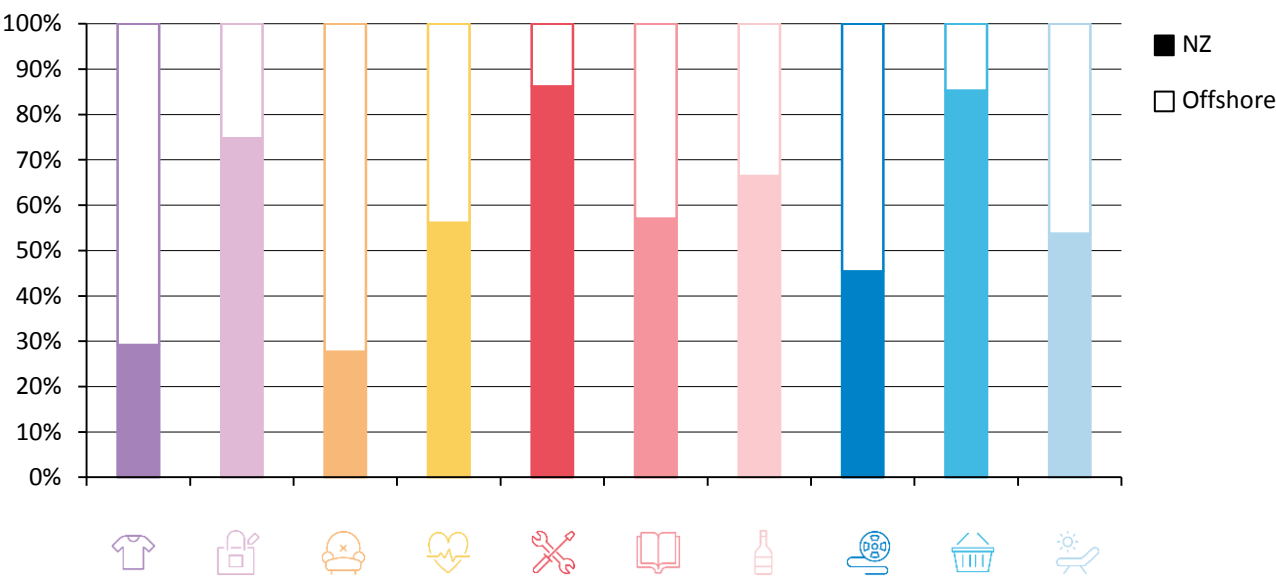
Monthly online revenue change year-on-year



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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