



# Retailwatch














## Value of electronic card transactions within retail categories

Period ending 28/07/2018

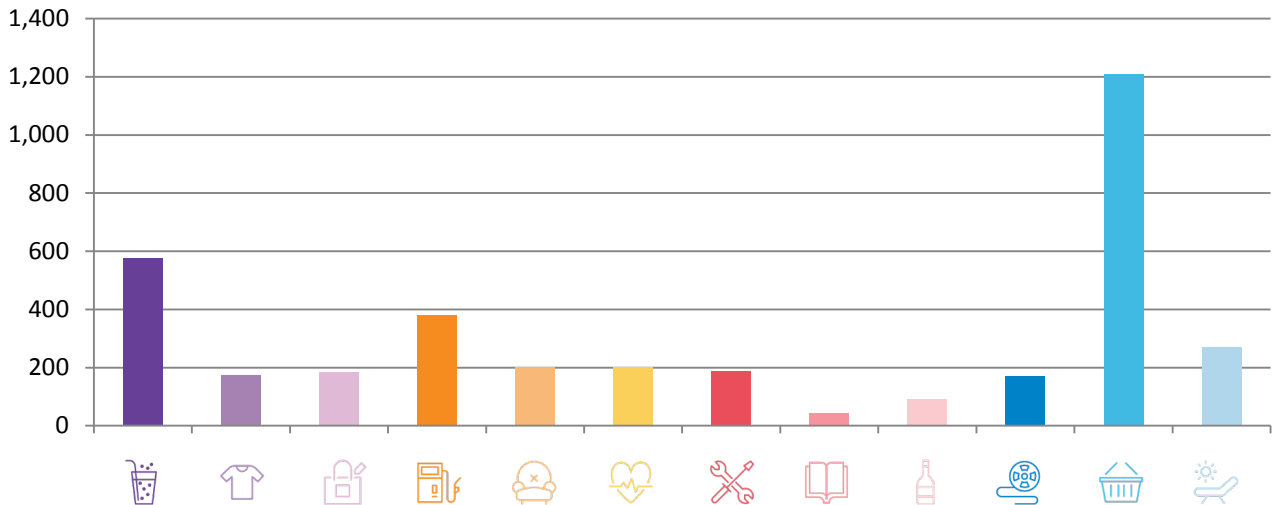
Total retail spend in New Zealand for the 28 days ending 28 July 2018 was \$3.7 billion. This was a decrease of 0.4% compared to June and increase of 2.1% when compared to the same period last year.

Spending was up in seven categories year-on-year; Fuel & Service Stations saw the greatest increase, up 12.7%, followed by the Recreation & Entertainment category (+10.1%). Clothing & Footwear had the greatest decrease year-on-year (-6.5%) closely followed by Books & Stationery Stores.

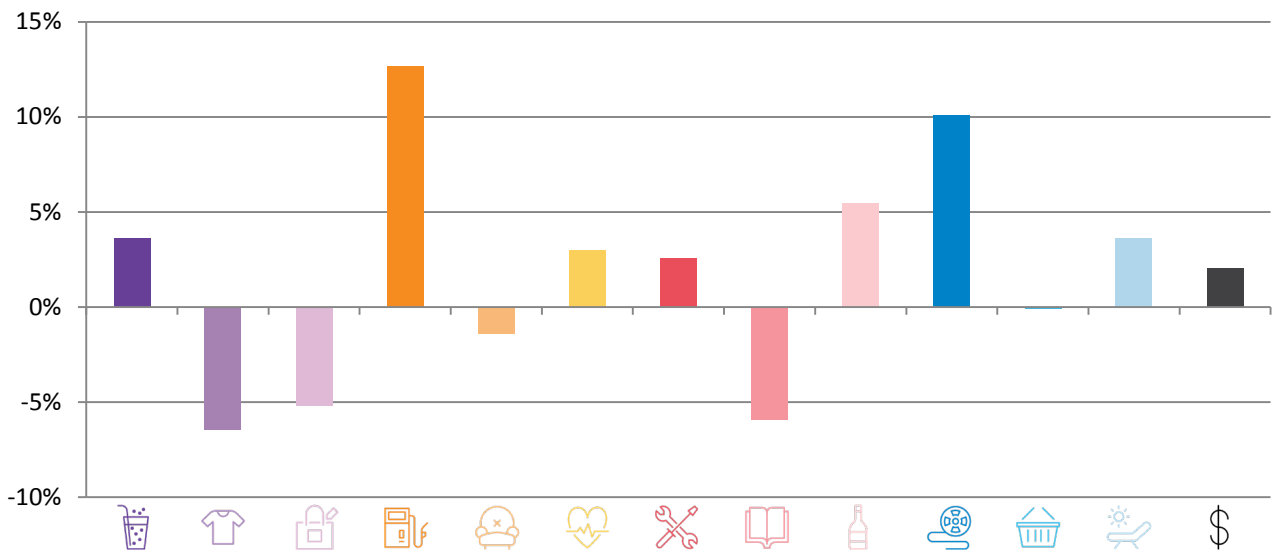
Month-on-month, just five of the twelve categories experienced increases in spend with the Recreation & Entertainment category increasing 17.1%. The largest decrease in spending month-on-month was seen in the Clothing & Footwear category down 10.7%.

Retailer Category	Month Total \$M	% Change vs Prior Month	% Change vs Last Year	% Share
 Cafés, Restaurants & Bars	577	2.4%	3.6%	15.6%
 Clothing & Footwear	173	-10.7%	-6.5%	4.7%
 Department Stores	183	-6.8%	-5.2%	5.0%
 Fuel & Service Stations	381	-2.5%	12.7%	10.3%
 Furniture, Appliances & Electronics	200	-4.1%	-1.4%	5.4%
 Health Goods & Services	203	1.2%	3.0%	5.5%
 Home & Building Supplies	188	-2.3%	2.6%	5.1%
 Books & Stationery Stores	43	4.0%	-5.9%	1.2%
 Liquor Stores	90	-1.0%	5.4%	2.4%
 Recreation & Entertainment	171	17.1%	10.1%	4.6%
 Supermarkets & Food Retailers	1,211	-0.5%	-0.1%	32.8%
 Travel & Accommodation	269	2.6%	3.6%	7.3%
 <b>TOTAL RETAIL SPEND</b>	<b>3,689</b>	<b>-0.4%</b>	<b>2.1%</b>	<b>100%</b>

## Monthly retail spend by category (\$M)



## Change vs last year



## Quarterly summary

### July 2018













The total quarterly retail spend for the 91 days ending 28 July 2018 was \$12 billion. This was a decrease of 2.3% when compared to the previous quarter and an increase of 1.2% when compared to the same period last year.

Four of the twelve categories experienced increases in spend when compared to the previous quarter. The Health Goods & Services category had the greatest rise in spending (+4.4%) while the largest decrease in spend since last quarter was seen in the Travel & Accommodation category (-7.6%), with the Home & Building Supplies & Liquor Store categories following, both down 6.8%.

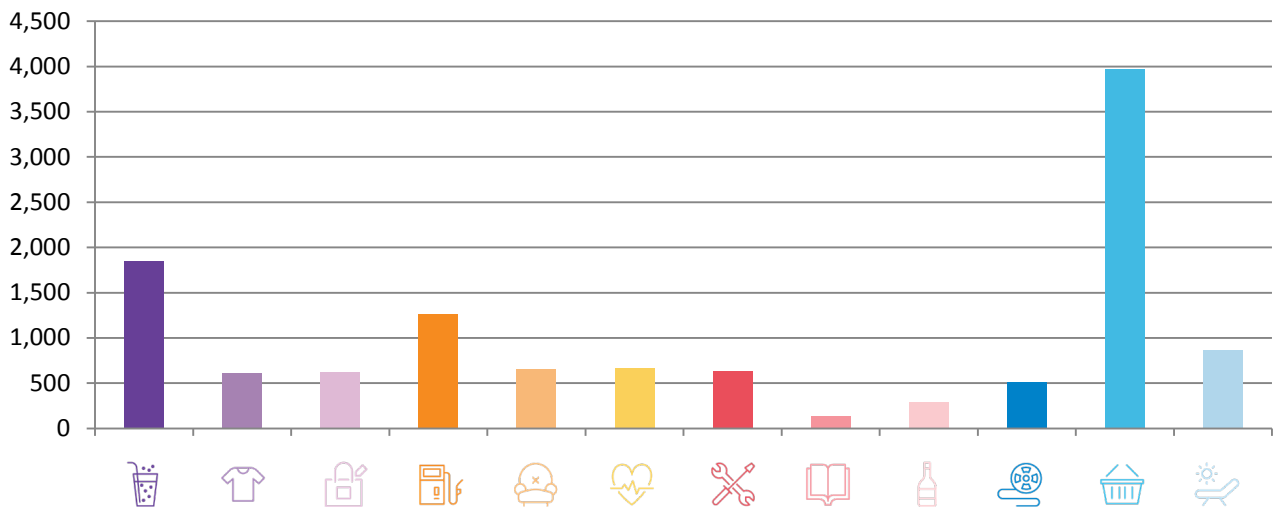
Compared to the same quarter of the previous year, spending increased in seven of the twelve categories. Similar to June, the Fuel & Service Station category had the greatest increase, up 10.0%. The largest decrease was seen in the Books & Stationery Stores category, decreasing 5.3%.

# Quarterly summary

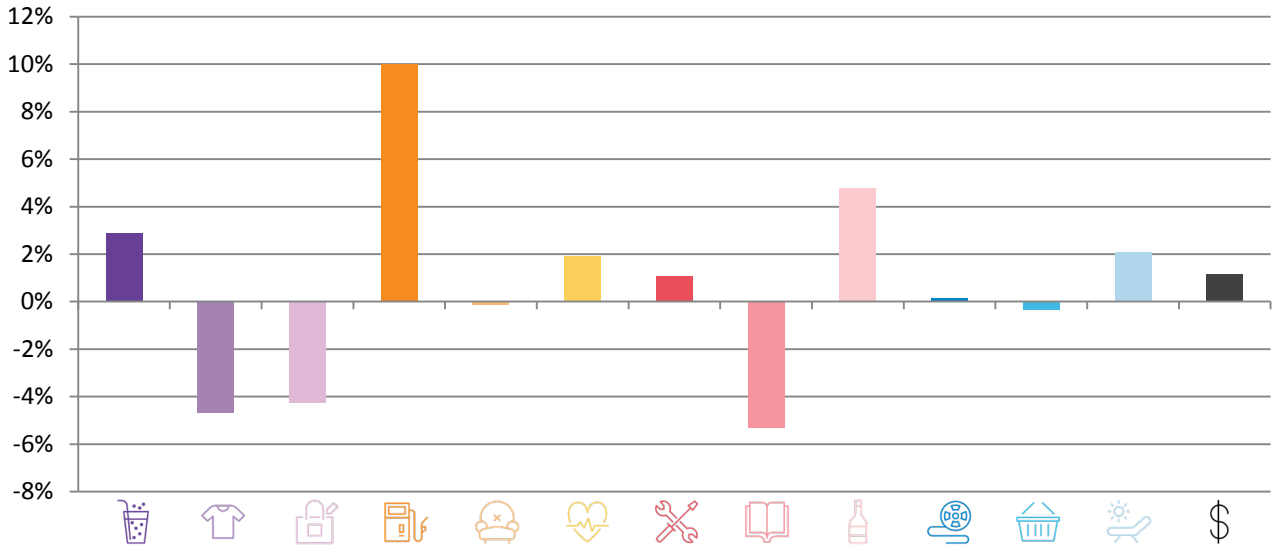
July 2018

Retailer Category	Quarter Total \$M	% Change vs Prior Quarter	% Change vs Last Year	% Share
 Cafés, Restaurants & Bars	1,850	-1.4%	2.9%	15.3%
 Clothing & Footwear	605	2.8%	-4.7%	5.0%
 Department Stores	621	2.9%	-4.2%	5.1%
 Fuel & Service Stations	1,263	-1.9%	10.0%	10.5%
 Furniture, Appliances & Electronics	659	1.5%	-0.2%	5.5%
 Health Goods & Services	663	4.4%	1.9%	5.5%
 Home & Building Supplies	631	-6.8%	1.1%	5.2%
 Books & Stationery Stores	137	-3.8%	-5.3%	1.1%
 Liquor Stores	296	-6.8%	4.8%	2.5%
 Recreation & Entertainment	510	-0.2%	0.2%	4.2%
 Supermarkets & Food Retailers	3,973	-3.8%	-0.4%	32.9%
 Travel & Accommodation	866	-7.6%	2.1%	7.2%
<b>\$ TOTAL RETAIL SPEND</b>	<b>12,075</b>	<b>-2.3%</b>	<b>1.2%</b>	<b>100%</b>

## Quarterly spend by category (\$M)



## Change vs last year



## Selected regions of interest

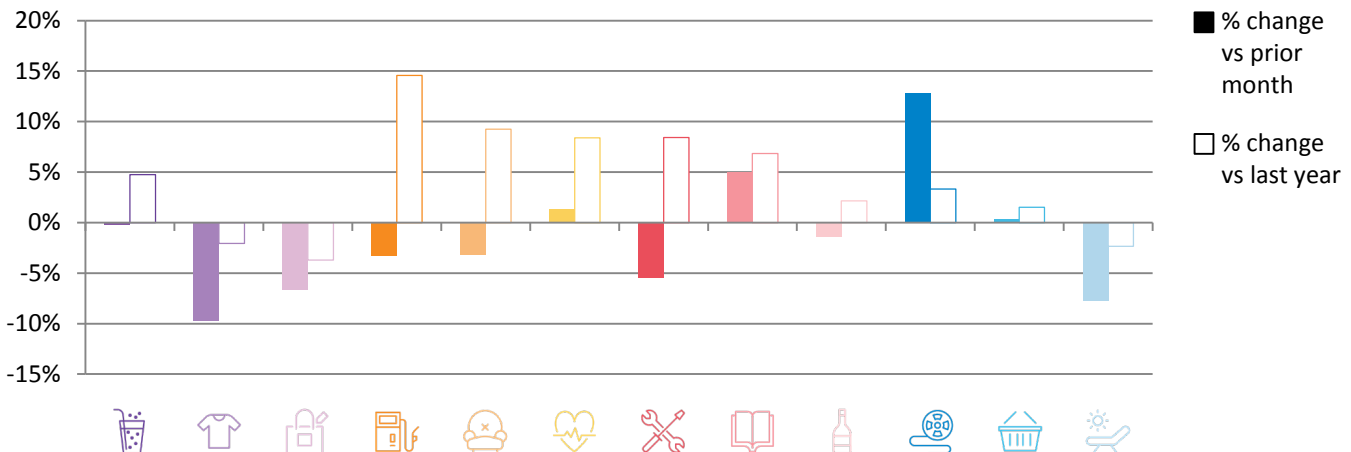
July 2018

### Monthly trends Southland

Retail spend in the Southland region for the 28 days ending 28/07/2018 was \$70.7 million. This represents a decrease in spend of 1.7% from the previous month and an increase of 3.5% year-on-year.

Retail spending in the Southland region was up in nine of the twelve categories compared to July last year. The greatest increase in year-on-year spend was seen in the Fuel & Service Stations category up 14.6%. The greatest drop in year-on-year spend was seen in the Department Stores category declining 3.7%.

Compared to June, four of the twelve categories experienced an increase in spend. The Recreation & Entertainment category increased by 12.8%, while the Clothing & Footwear category decreased by 9.7%.

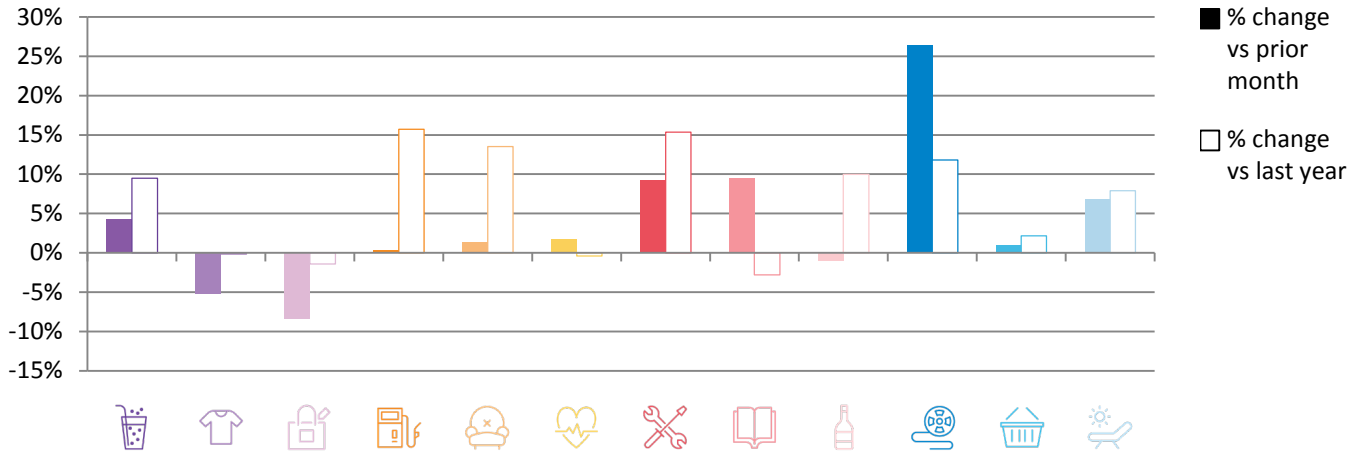


## Monthly trends Hawke's Bay

Retail spend in the Hawke's Bay region for the 28 days ending 28/07/2018 was \$117.9 million. This represents increases of 2.1% against the previous month and 6.1% year-on-year.

Compared to July 2017, spending was up in nine of the twelve categories, with two large increases in Fuel & Service Stations (15.7%) and Home & Building Supplies (15.4%). Books & Stationery Stores had the largest decrease in spend when compared to last year, dropping just 2.8%.

Month-on-month spend was also up in nine categories, with Recreation & Entertainment up 26.3% followed by the Books & Stationery category increasing 9.5%. The greatest drop in spending was a decline of 8.4% in the Department Stores category followed by Clothing & Footwear (-5.2%).



## Monthly trends Otago

Retail spend in the Otago region for the 28 days ending 28/07/2018 was \$178.4 million. This represents a decrease of 0.2% against the previous month and an increase of 5.6% year-on-year.

Retail spending in the Otago region increased in nine of the twelve categories year-on-year. The Fuel & Services Stations category saw the greatest increase in spend going up 19.0%, this was followed by Furniture, Appliances & Electronics increasing by 16.5%. There were small decreases in spend when compared to July last year, the greatest decrease was in the Clothing & Footwear category down 3.8%.

Compared to June, seven categories experienced increases in spend. The Recreation & Entertainment category was up 8.3%, the Cafés, Restaurants, & Bars category saw no change. The Clothing & Footwear category had the greatest decrease down 12.2%.



## Going up this month

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

The Hawke's Bay region experienced the greatest increase this month of 2.1% when compared to June 2018.

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Categories up

6

Regions up

## Going down this month

The largest decrease in spending this month was seen in the Clothing & Footwear category down 10.7%.

The Southland region experienced the greatest decrease in spend this month, down 1.7%.

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Categories down

10

Regions down

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## 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 July 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 28/07/2018

Total online retail spend in New Zealand for the 28 days ending 28 July 2018 was \$49.3 billion. This represents an increase of 7.2% year-on-year and a decrease of 3.4% 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 for the second month in a row, up a huge 67.6%. The Books & Stationery category exhibited the only decrease in spend, declining 1.9%.

Month-on-month, only one of the ten categories experienced increases in spend. The only increase in spend was exhibited in the Home & Building Supplies category up 2.3%. The largest drop in month-on-month spend was in the Clothing & Footwear category, down 13.3%.

Online Retailer Category	Month Total \$M	% Change vs Prior Month	% Change vs Last Year	% Share
 Clothing & Footwear	31.6	-13.3%	3.6%	6.4%
 Department Stores	11.4	-4.8%	4.5%	2.3%
 Furniture, Appliances & Electronics	35.1	-5.5%	14.2%	7.1%
 Health Goods & Services	9.6	-1.2%	0.6%	2.0%
 Home & Building Supplies	7.4	2.3%	67.6%	1.5%
 Books & Stationery Stores	8.8	-11.9%	-1.9%	1.8%
 Liquor Stores	2.9	-12.2%	7.3%	0.6%
 Recreation & Entertainment	102.4	-4.2%	14.2%	20.8%
 Supermarkets & Food Retailers	43.0	-1.2%	17.2%	8.7%
 Travel & Accommodation	241.0	-1.3%	2.2%	48.9%
 <b>Total Online Retail Spend</b>	<b>493.2</b>	<b>-3.4%</b>	<b>7.2%</b>	<b>100%</b>

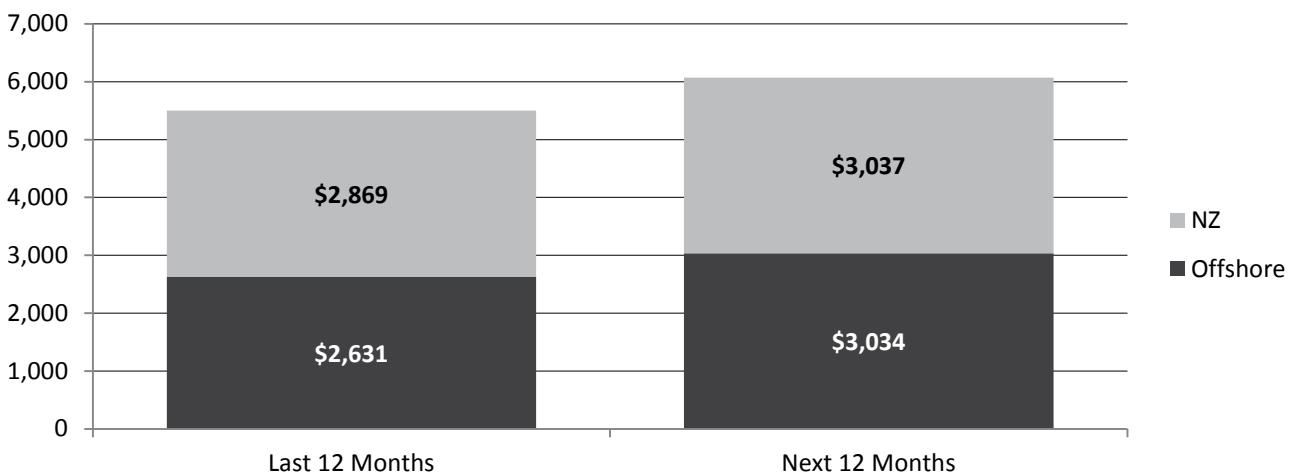
## Online: New Zealand vs Offshore

New Zealand merchants accounted for 51% of online spend for the month of July. This was a decrease of 0.1% compared to the previous month and an increase of 9.7% compared to the previous year.

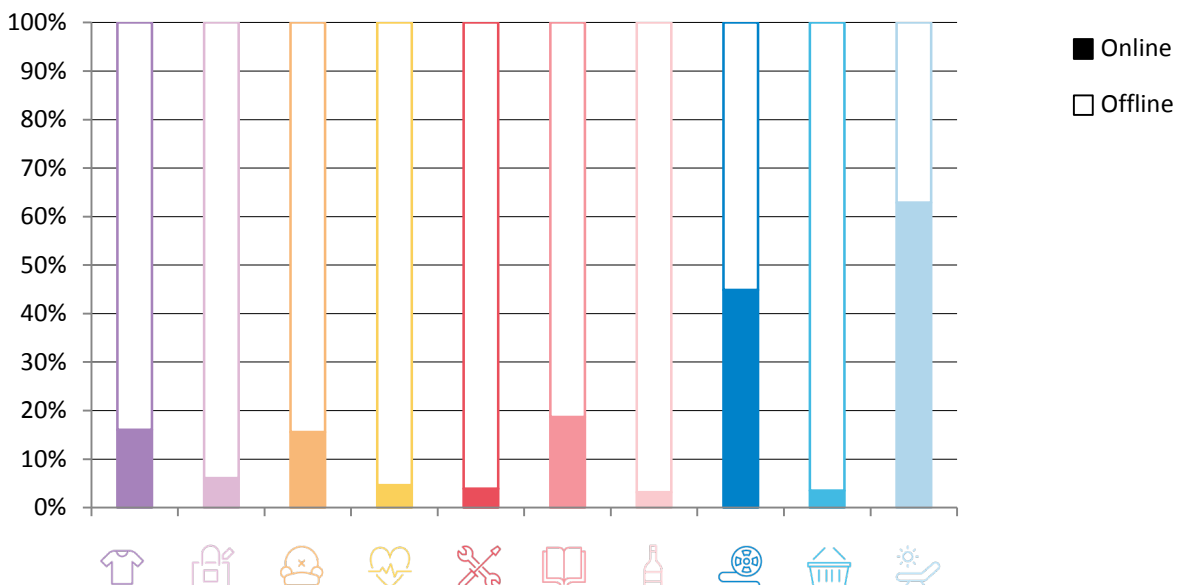
For New Zealand merchants, three of the ten categories saw increases in spend compared to June, with the Health Goods & Services category experiencing the greatest increase in spend, going up 14.9%. Department Stores saw the biggest decrease in online spend, dropping 21.1%. New Zealand merchants saw increases in seven categories when compared to July 2017.

Spend at offshore retail merchants decreased by 6.7% when compared to the previous month but increased by 4.8% 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 (+109.0%), while the greatest decrease was seen in the Supermarkets & Food Retailers category, down 13.8%.

## Projected total online spend (\$M)














## % share of category spend



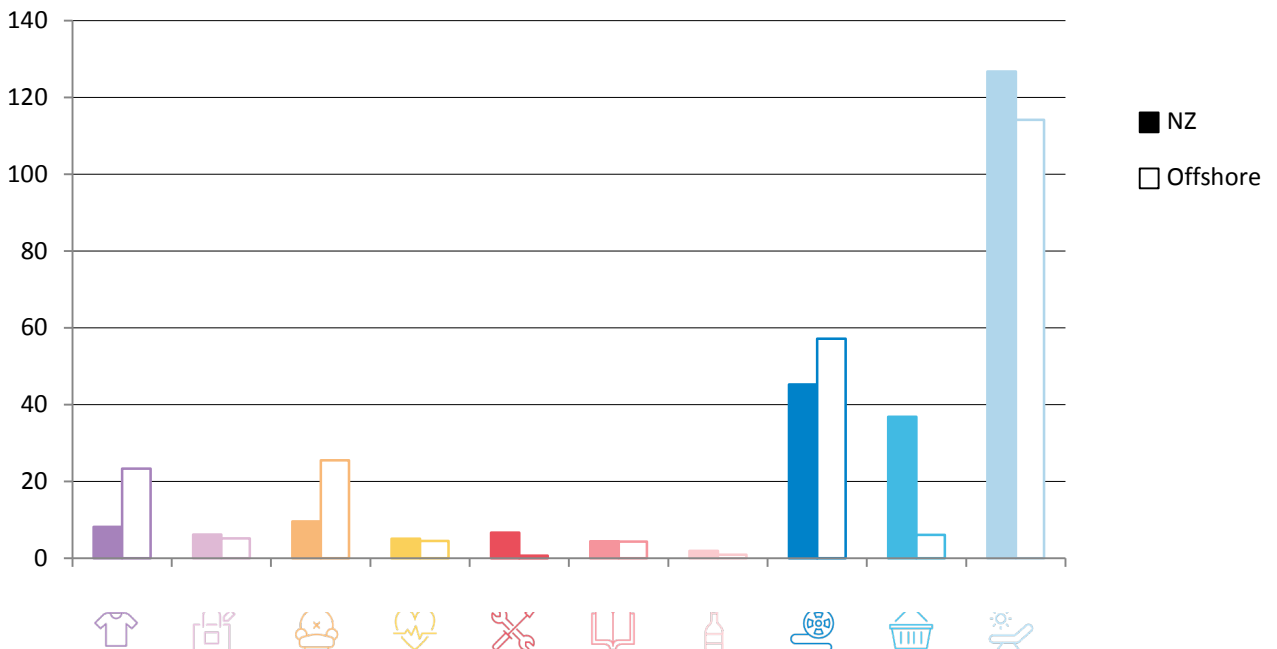


# Online retail market summary New Zealand vs Offshore merchants

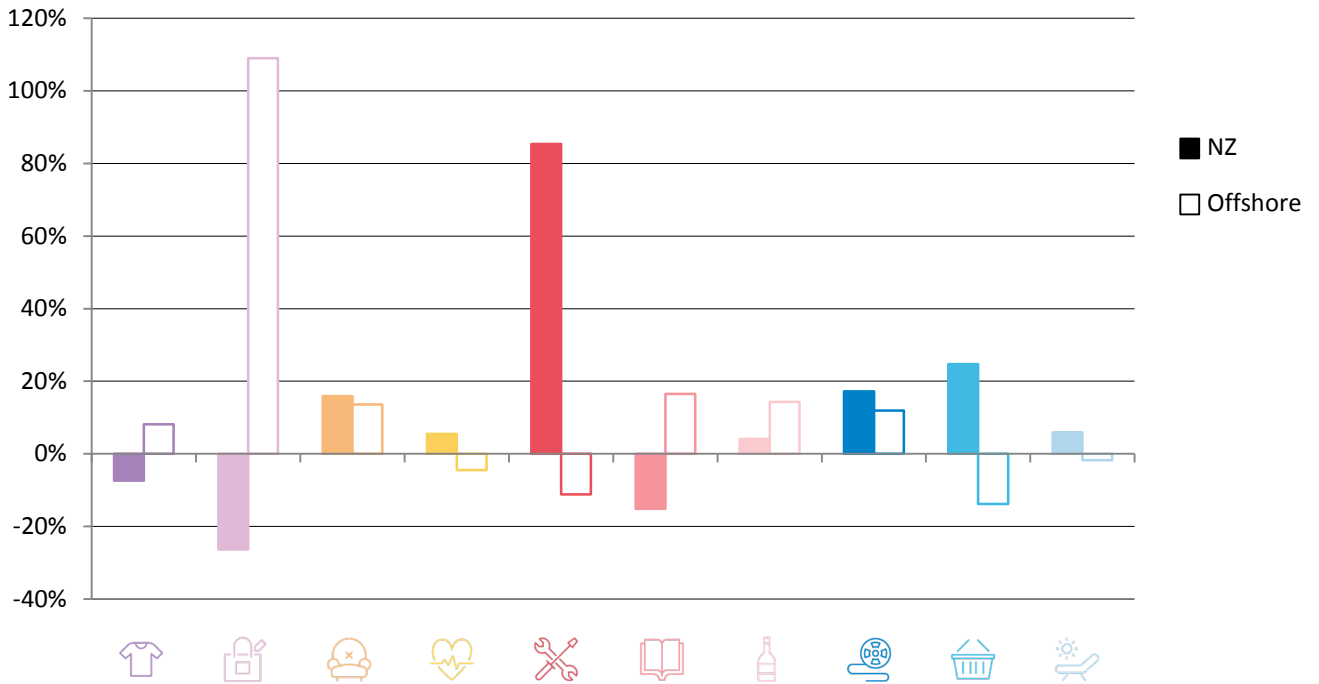
July 2018

Retailer Category	Month Total \$M		% Change vs Prior Month		% Change vs Last Year	
	NZ	Offshore	NZ	Offshore	NZ	Offshore
 Clothing & Footwear	8.2	23.3	-15.0%	-12.7%	-7.4%	8.1%
 Department Stores	6.2	5.2	-21.1%	26.1%	-26.3%	109.0%
 Furniture, Appliances & Electronics	9.6	25.6	-0.9%	-7.2%	15.9%	13.6%
 Health Goods & Services	5.1	4.5	14.9%	-14.8%	5.5%	-4.4%
 Home & Building Supplies	6.7	0.7	5.0%	-17.6%	85.3%	-11.2%
 Books & Stationery Stores	4.4	4.4	-19.9%	-2.0%	-15.2%	16.5%
 Liquor Stores	1.9	1.0	-18.3%	3.2%	4.1%	14.3%
 Recreation & Entertainment	45.3	57.2	-0.1%	-7.3%	17.2%	11.9%
 Supermarkets & Food Retailers	36.9	6.1	-0.4%	-5.7%	24.7%	-13.8%
 Travel & Accommodation	126.8	114.2	3.3%	-6.0%	6.0%	-1.7%
 <b>Total Retail Spend</b>	<b>251.1</b>	<b>242.1</b>	<b>0.1%</b>	<b>-6.7%</b>	<b>9.7%</b>	<b>4.8%</b>

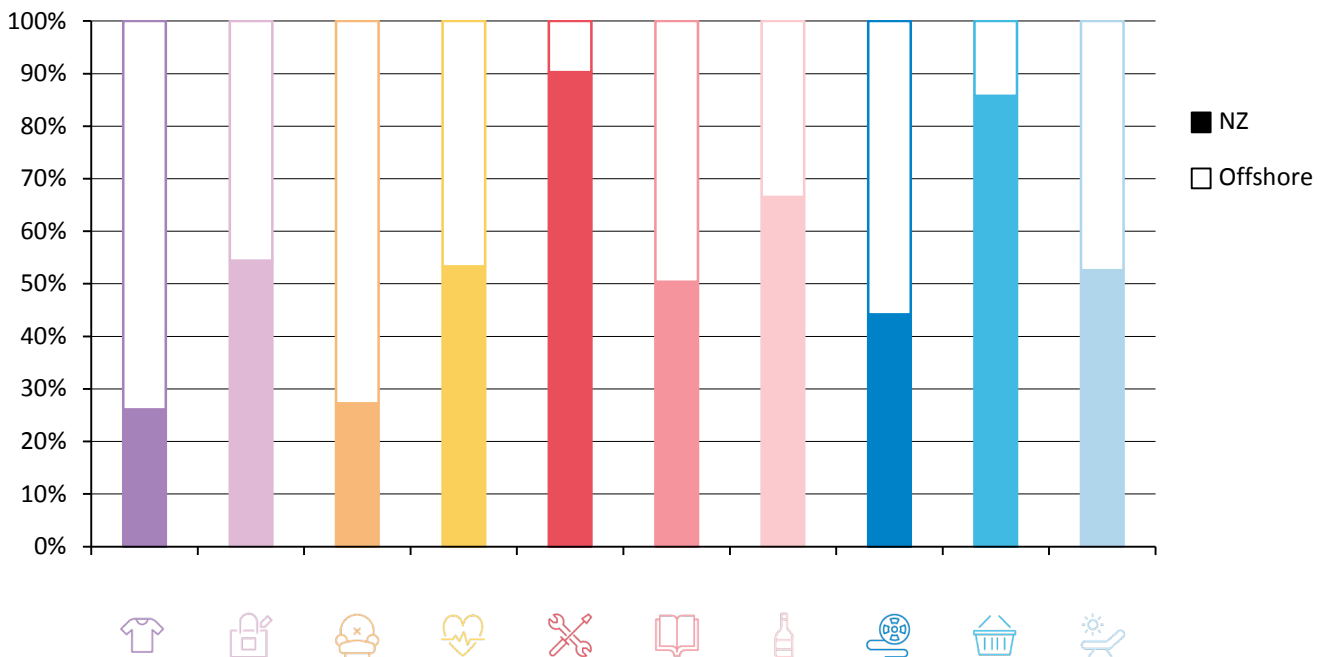
## Online retailer total revenue by category (\$M)



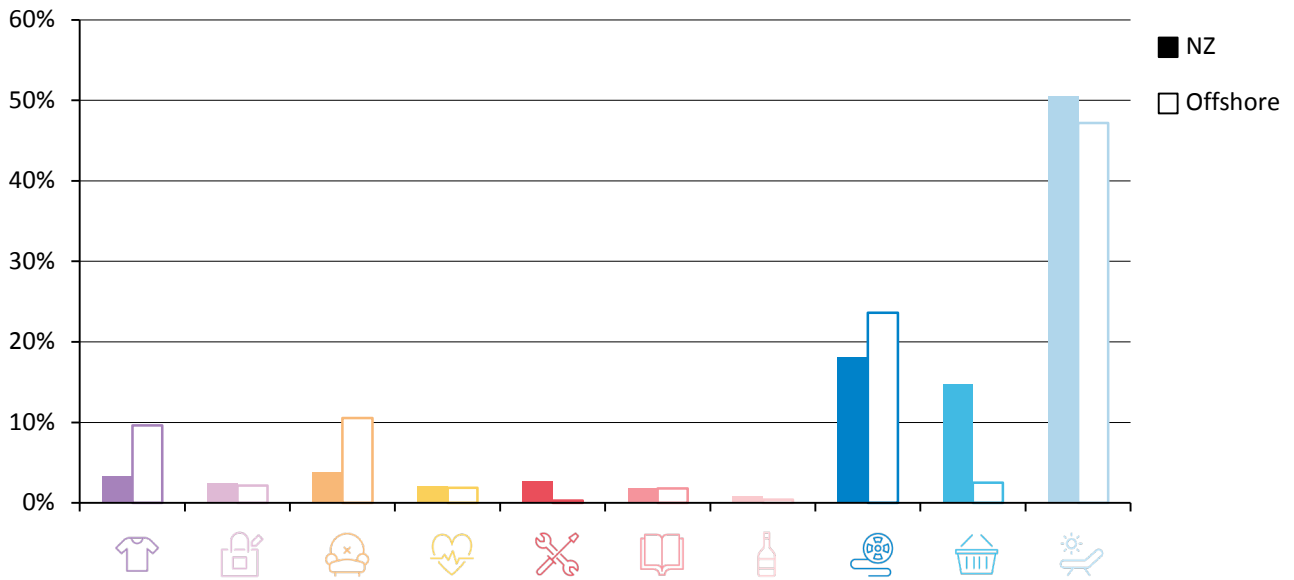
## Monthly online revenue change year-on-year



## 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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