



Retailwatch














Value of electronic card transactions within retail categories

Period ending 28/05/2018

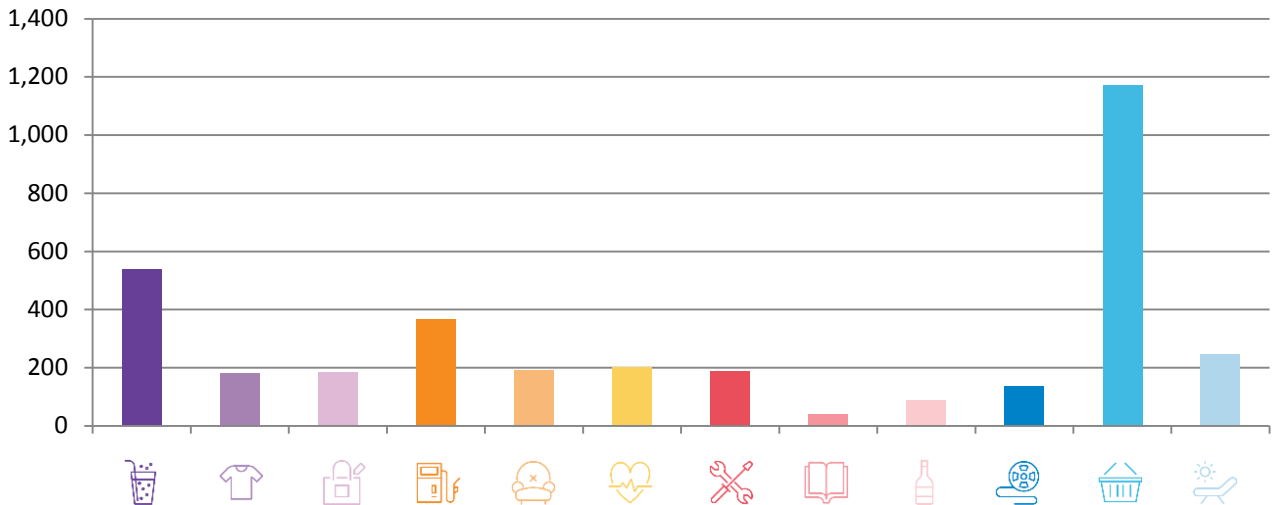
Total retail spend in New Zealand for the 28 days ending 28 May 2018 was \$3.5 billion. This was a decrease of 1.4% compared to April and 2.8% when compared to the same period last year.

Spending was up in only three categories year-on-year; the Fuel & Service Stations category saw the greatest increase with 4.3%, followed by the Liquor Stores category up 2.3%. The greatest decreases were seen in the Recreation & Entertainment and Clothing & Footwear categories, decreasing by 12.7% and 11.0% respectively.

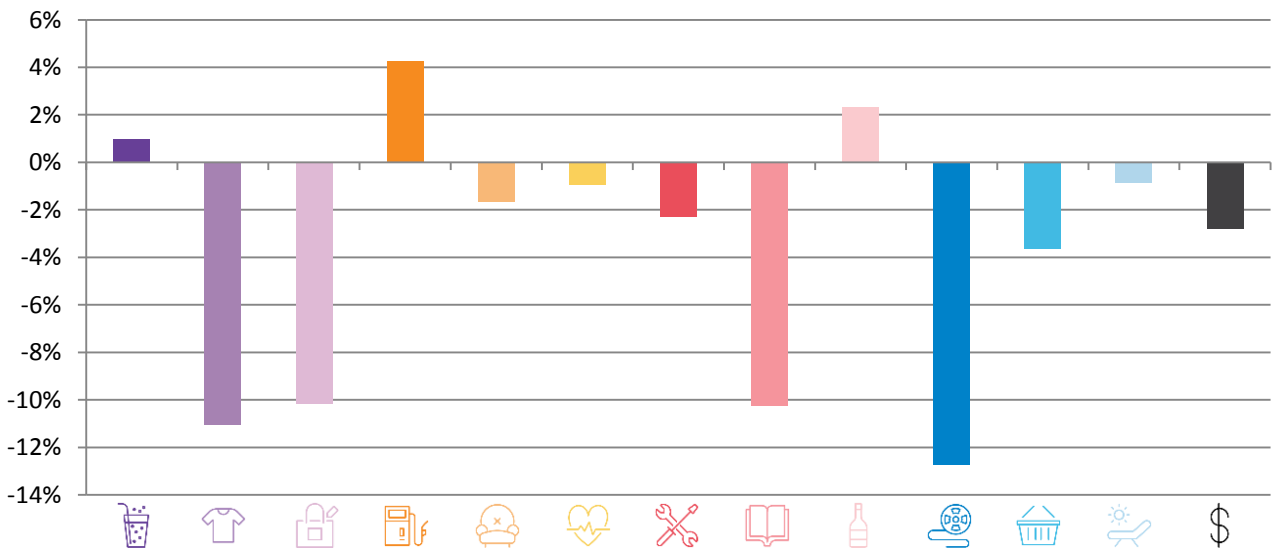
Month-on-month, four of the twelve categories experienced increases in spend with the largest increase seen in the Health Goods & Services category (+7.4%), this is in contrast from April where Health Goods & Services had dropped 7.9% from the previous month. The largest decrease in spend month-on-month was seen in Recreation & Entertainment, dropping by 8.8%.

| Retailer Category | Month Total \$M | % Change vs Prior Month | % Change vs Last Year | % Share |
|--|-----------------|-------------------------|-----------------------|-------------|
|  Cafés, Restaurants & Bars | 538 | -4.2% | 1.0% | 15.3% |
|  Clothing & Footwear | 179 | -7.3% | -11.0% | 5.1% |
|  Department Stores | 182 | -1.9% | -10.2% | 5.2% |
|  Fuel & Service Stations | 365 | 0.8% | 4.3% | 10.4% |
|  Furniture, Appliances & Electronics | 190 | -0.9% | -1.7% | 5.4% |
|  Health Goods & Services | 200 | 7.4% | -0.9% | 5.7% |
|  Home & Building Supplies | 186 | -6.5% | -2.3% | 5.3% |
|  Books & Stationery Stores | 40 | 6.1% | -10.2% | 1.1% |
|  Liquor Stores | 87 | -2.4% | 2.3% | 2.5% |
|  Recreation & Entertainment | 135 | -8.8% | -12.7% | 3.8% |
|  Supermarkets & Food Retailers | 1,171 | 0.7% | -3.6% | 33.3% |
|  Travel & Accommodation | 247 | -2.6% | -0.9% | 7.0% |
|  TOTAL RETAIL SPEND | 3,520 | -1.4% | -2.8% | 100% |

Monthly retail spend by category (\$M)



Change vs last year



Quarterly summary

May 2018














The total quarterly retail spend for the 91 days ending 28 May 2018 was \$11.7 billion. This was a decrease of 7.9% when compared to the previous quarter and almost a drop of 1.1% when compared to the same period last year.

Only one of the twelve categories experienced an increase in spend when compared to the previous quarter. Health Goods & Services saw the only increase at 7.2%. The largest decrease in spend was seen in the Books & Stationery Stores category declining 29.3%, the Department Stores category weren't too far behind with a decrease of 24.7%.

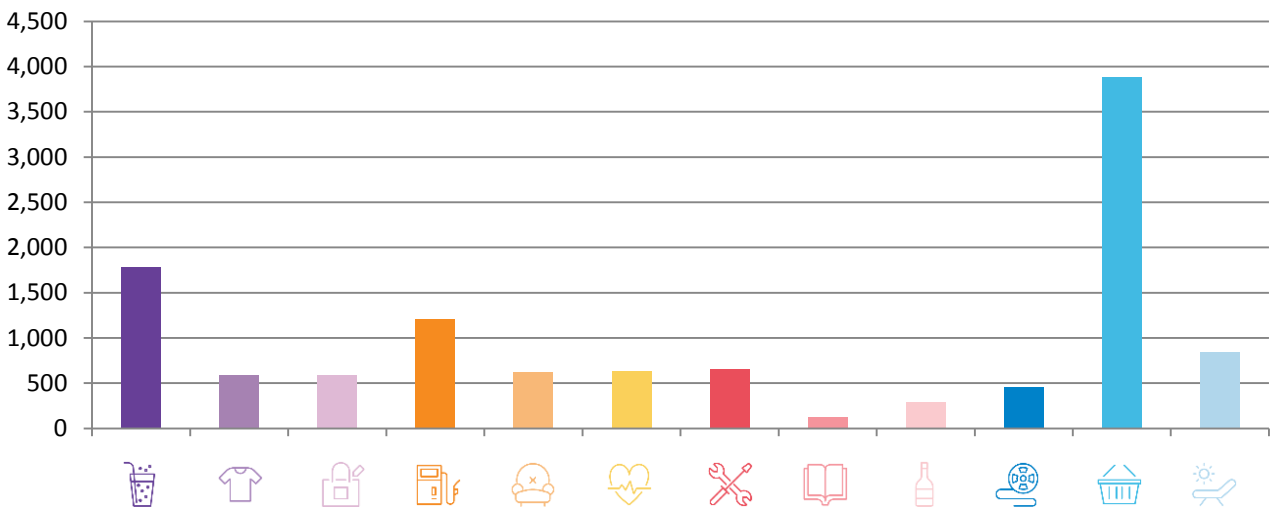
Compared to the same quarter of the previous year, spending increased in six of the twelve categories. Liquor Stores and Fuel & Service Stations saw respective increases of 2.8% and 2.7%, while Books & Stationery Stores saw the greatest category decline at 9.2%.

Quarterly summary

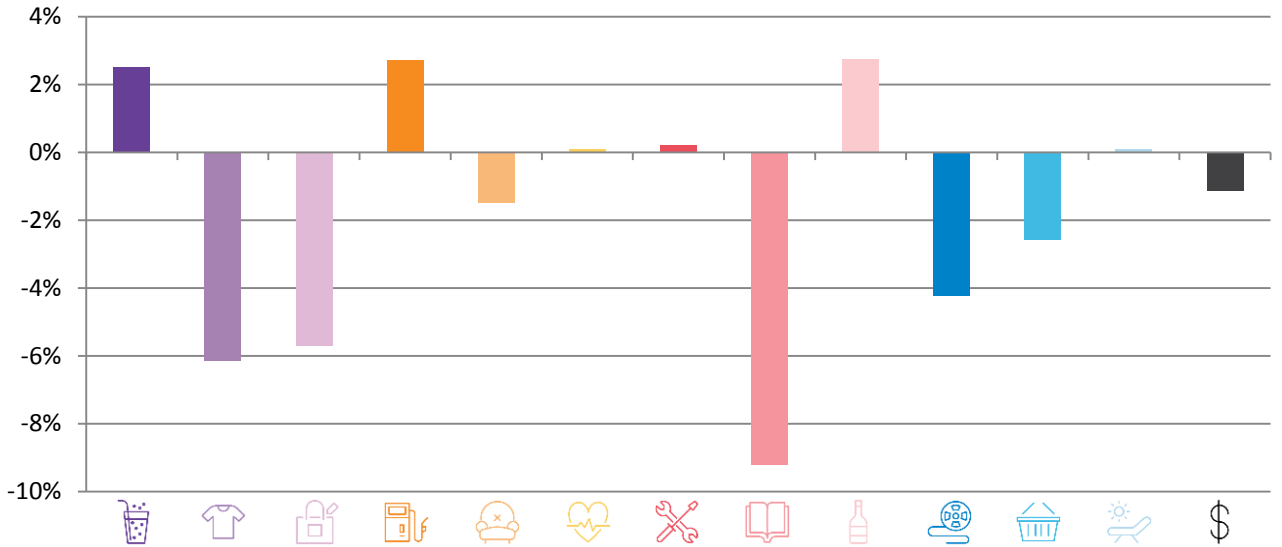
May 2018

| Retailer Category | Quarter Total \$M | % Change vs Prior Quarter | % Change vs Last Year | % Share |
|--|-------------------|---------------------------|-----------------------|-------------|
|  Cafés, Restaurants & Bars | 1,784 | -1.2% | 2.5% | 15.3% |
|  Clothing & Footwear | 589 | -10.7% | -6.1% | 5.0% |
|  Department Stores | 585 | -24.7% | -5.7% | 5.0% |
|  Fuel & Service Stations | 1,205 | -5.5% | 2.7% | 10.3% |
|  Furniture, Appliances & Electronics | 626 | -16.4% | -1.5% | 5.4% |
|  Health Goods & Services | 634 | 7.2% | 0.1% | 5.4% |
|  Home & Building Supplies | 652 | -11.1% | 0.2% | 5.6% |
|  Books & Stationery Stores | 128 | -29.3% | -9.2% | 1.1% |
|  Liquor Stores | 296 | -18.2% | 2.8% | 2.5% |
|  Recreation & Entertainment | 459 | -7.0% | -4.2% | 3.9% |
|  Supermarkets & Food Retailers | 3,890 | -7.7% | -2.6% | 33.3% |
|  Travel & Accommodation | 848 | -0.8% | 0.1% | 7.2% |
|  TOTAL RETAIL SPEND | 11,698 | -7.9% | -1.1% | 100% |

Quarterly spend by category (\$M)



Change vs last year



Selected regions of interest

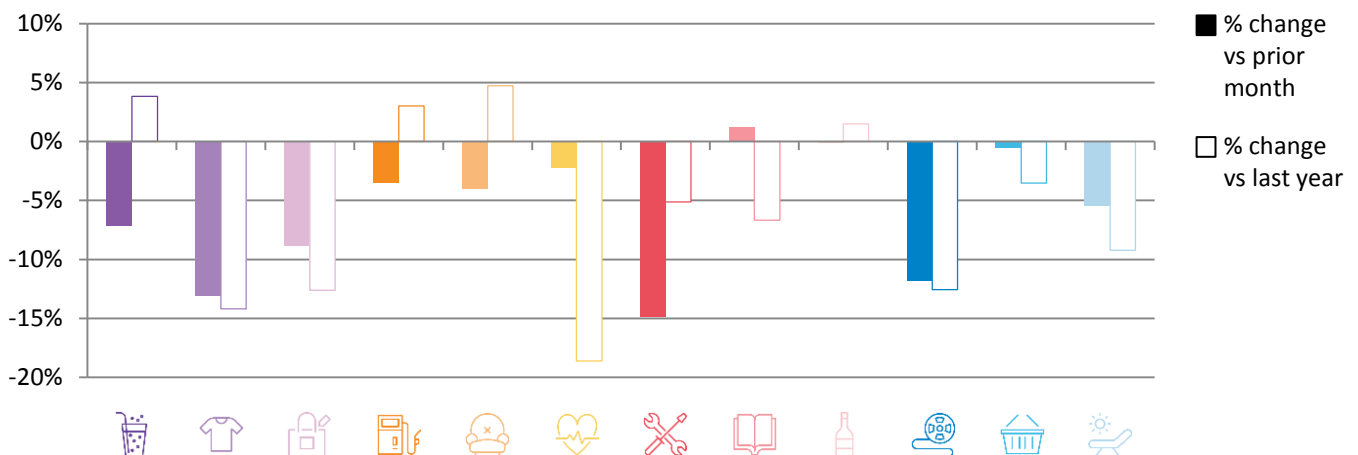
May 2018

Monthly trends Nelson

Retail spend in the Nelson region for the 28 days ending 28/05/2018 was \$35.5 million. This represents decreases of 4.7% from the previous month and 4.7% year-on-year.

Retail spending in the Nelson region was up in four of the twelve categories compared to May last year. The greatest increase in year-on-year spend was seen in the Furniture, Appliances & Electronics up 4.7%. The greatest drop in year-on-year spend was seen in Health Goods & Services declining 18.6%.

Compared to April, just one of the twelve categories experienced an increase in spend. Books & Stationery Stores increased by 1.3%. The largest of the decreases were seen in the Home & Building Supplies and Clothing & Footwear categories, down 14.9% and 13.1% respectively.

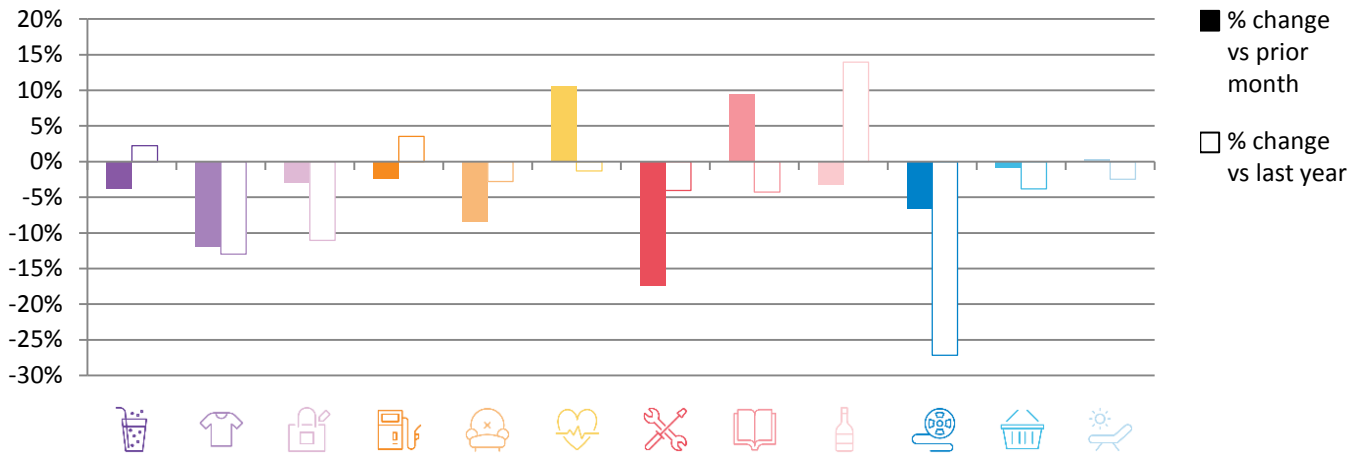


Monthly trends Taranaki

Retail spend in the Taranaki region for the 28 days ending 28/05/2018 was \$90.6 million. This represents a decrease of 3.3% against the previous month and a decrease of 3.6% year-on-year.

Compared to May 2017, spending was up in only three categories, with Liquor Stores (+13.9%) experiencing the largest increase in spend. Spending was down by 27.1% in the Recreation & Entertainment category.

Month-on-month spend was also up in just three categories, with Health Goods & Services (+10.6%) experiencing the largest increase in spend, followed by Books & Stationery Stores up 9.5%. Home & Building Supplies experienced the greatest decline, down 17.5% since April.

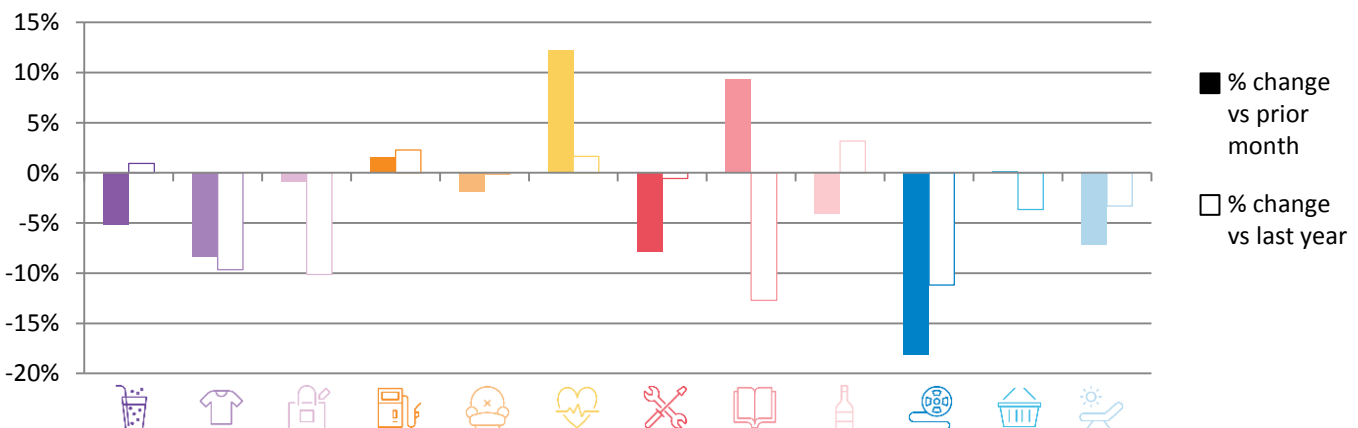


Monthly trends Canterbury

Retail spend in the Canterbury region for the 28 days ending 28/05/2018 was \$442 million. This represents a decrease of 2.2% against the previous month and a decrease of 2.8% year-on-year.

Retail spending in the Canterbury region increased in four of the twelve categories year-on-year. Liquor Stores saw the greatest increase in spend going up 3.2%. The biggest decline was seen in the Books & Stationery Stores category down by 12.7%.

Compared to April, again only four categories experienced increases in spend. The Health Goods & Services category was up 12.2% with Books & Stationery Stores following with a 9.4% increase. The Recreation & Entertainment category saw a drop of 18.2%.



Going up this month

The greatest increase in spending this month was seen in the Health Goods & Services category, up 7.4%.

None of the regions experienced an increase this month.

4

Categories up

0

Regions up

Going down this month

The largest decrease in spending this month was seen in the Recreation & Entertainment category, down 8.8%.

The Nelson region experienced the greatest decrease in spend this month, down 4.7% when compared to April 2018.

8

Categories down

16

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

While every effort has been made to ensure the accuracy of Retailwatch, Datamine is not responsible for, and expressly disclaims all liability for, damages of any kind arising out of use, reference to, or reliance on any information contained in Retailwatch.



Online Retailwatch












Online retail market summary

Period ending 28/05/2018

Total online retail spend in New Zealand for the 28 days ending 28 May 2018 was \$402.3 million. This represents a decrease of 3.4% year-on-year and a decrease of 4.1% against the previous month.

Online spending was up in four of the ten categories year-on-year. Supermarkets & Food Retailers saw the greatest increase in spending, up 10.2%. The Recreation & Entertainment category exhibited the greatest decrease in spend, declining 18.1% followed with a 16.9% decrease in the Home & Building Supplies category.

Month-on-month, only three of the ten categories experienced increases in spend. The greatest increase in spend was exhibited in the Supermarkets & Food Retailers category up 4.0%. The largest drop in month-on-month spend was in the Home & Building Supplies category, down 14.8%.

| Online Retailer Category | Month Total \$M | % Change vs Prior Month | % Change vs Last Year | % Share |
|--|-----------------|-------------------------|-----------------------|-------------|
|  Clothing & Footwear | 27.0 | -5.9% | 1.7% | 6.7% |
|  Department Stores | 9.7 | -9.4% | 5.3% | 2.4% |
|  Furniture, Appliances & Electronics | 27.8 | -8.9% | 7.5% | 6.9% |
|  Health Goods & Services | 7.6 | -6.1% | -5.9% | 1.9% |
|  Home & Building Supplies | 3.6 | -14.8% | -16.9% | 0.9% |
|  Books & Stationery Stores | 7.7 | 3.6% | -7.4% | 1.9% |
|  Liquor Stores | 2.5 | 0.4% | -6.0% | 0.6% |
|  Recreation & Entertainment | 77.6 | -7.7% | -18.1% | 19.3% |
|  Supermarkets & Food Retailers | 34.9 | 4.0% | 10.2% | 8.7% |
|  Travel & Accommodation | 204.0 | -2.7% | -0.6% | 50.7% |
|  Total Online Retail Spend | 402.3 | -4.1% | -3.4% | 100% |

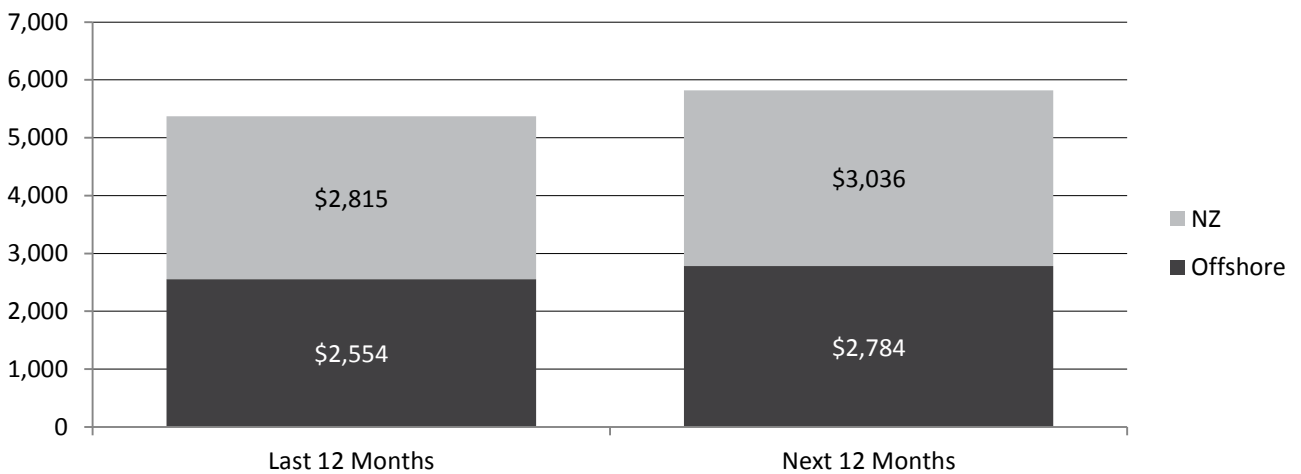
Online: New Zealand vs Offshore

New Zealand merchants accounted for 53% of online spend for the month of May. This was an decrease of 4.1% compared to the previous month and a decrease of 3.4% compared to the previous year.

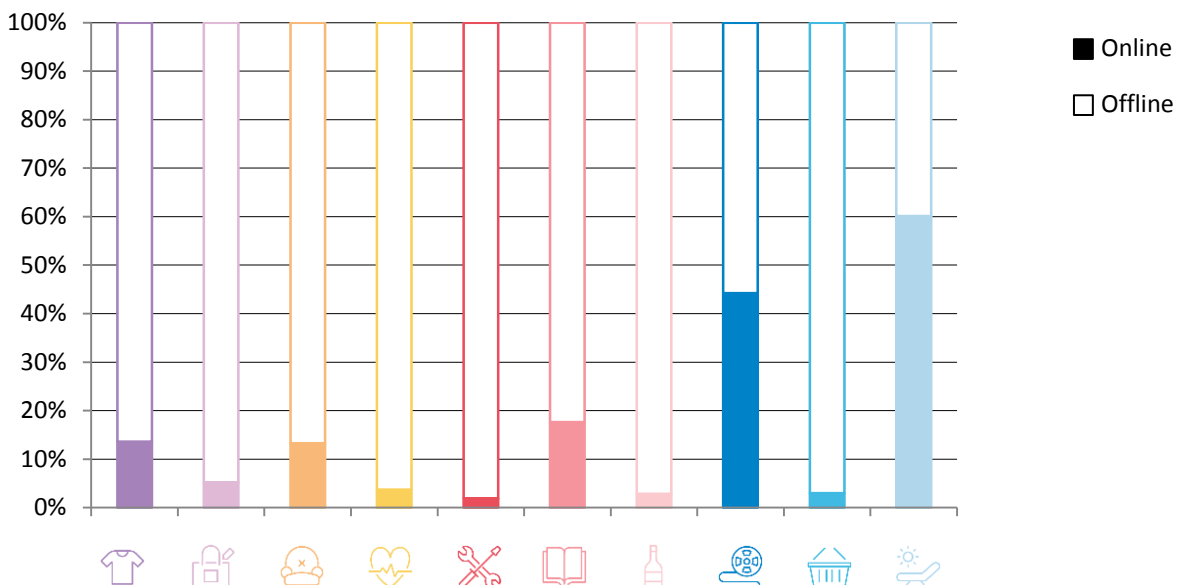
For New Zealand merchants, four of the ten categories saw increases in spend compared to April, with Books & Stationery Stores experiencing the greatest increase in spend, going up 10.8%. Health Goods & Services saw the biggest decrease in online spend, dropping 15.0% with Home & Building Supplies not far behind with a decline of 14.9%. New Zealand merchants saw increases in just three categories when compared to May 2017.

Spend at offshore retail decreased by 9.7% when compared to the previous month but increased by 2.7% when compared to the same period last year. Offshore merchants saw increases in spend in five categories year-on-year, the largest seen in Department Stores (+64.7%), while the greatest decrease was seen in the Supermarkets & Food Retailers category, down 13.5%.

Projected total online spend (\$M)














% share of category spend

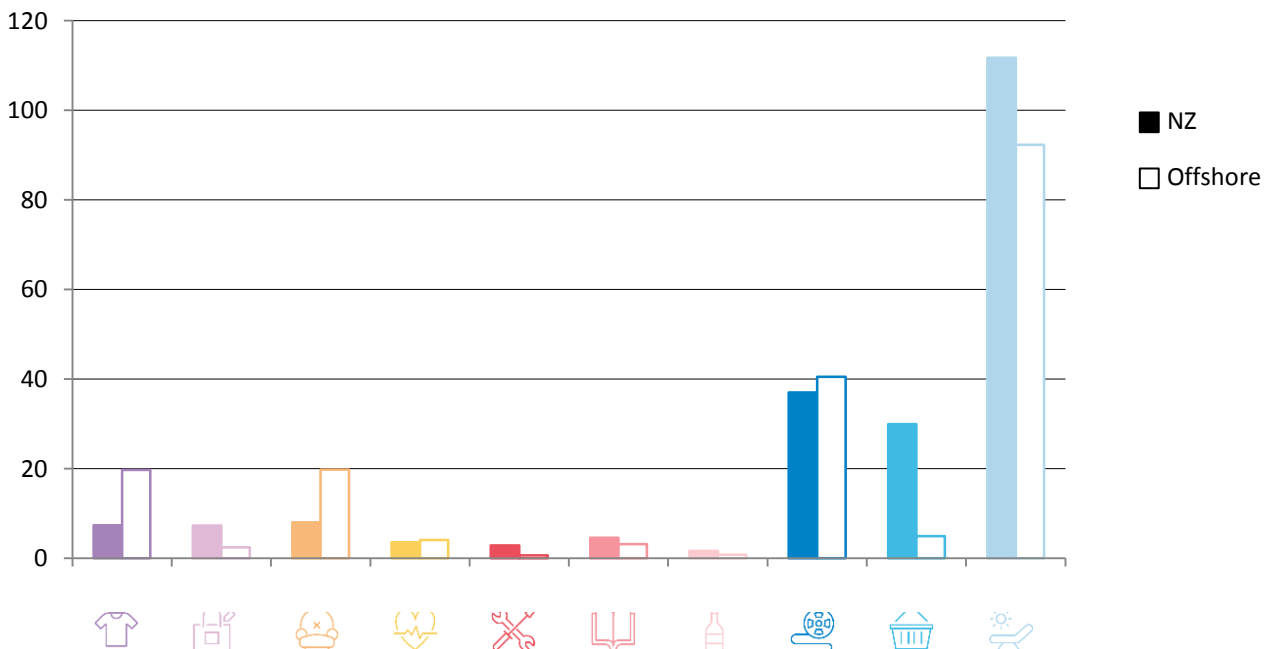


Online retail market summary New Zealand vs Offshore merchants

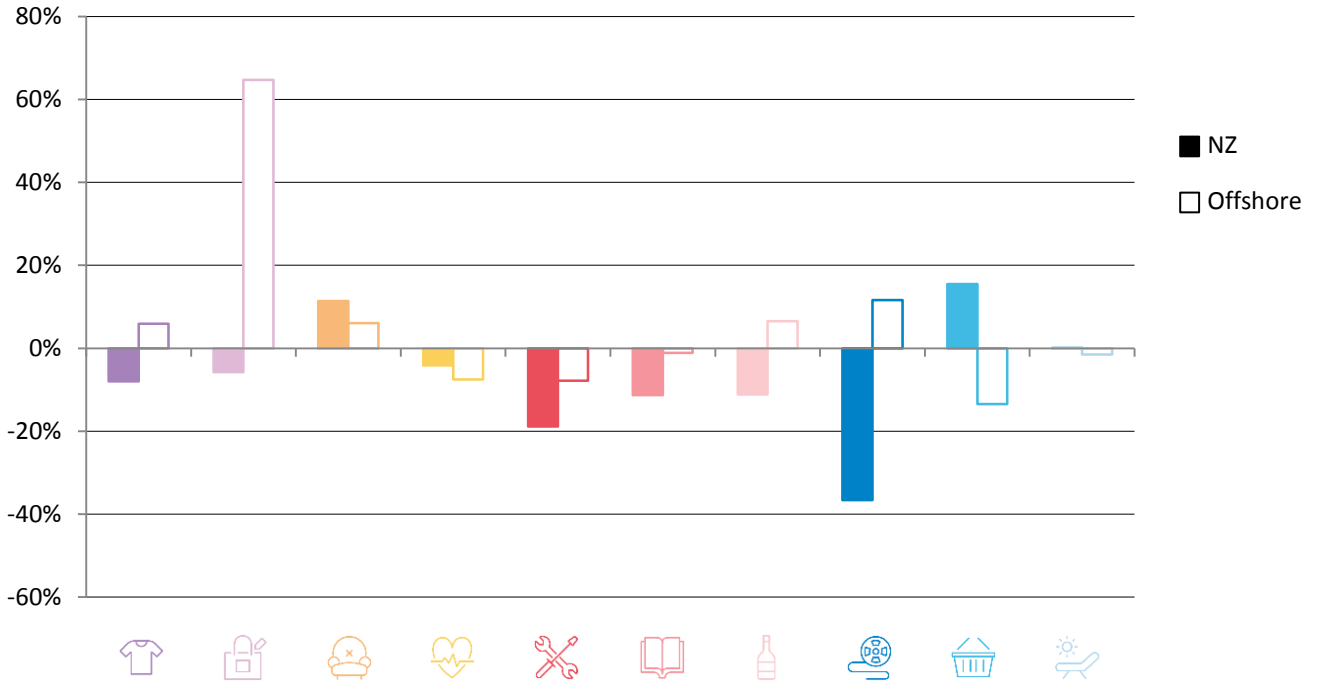
May 2018

| Retailer Category | Month Total \$M | | % Change vs Prior Month | | % Change vs Last Year | |
|--|-----------------|--------------|-------------------------|--------------|-----------------------|-------------|
| | NZ | Offshore | NZ | Offshore | NZ | Offshore |
|  Clothing & Footwear | 7.4 | 19.7 | -1.0% | -7.6% | -8.0% | 5.9% |
|  Department Stores | 7.3 | 2.4 | -7.8% | -14.1% | -5.8% | 64.7% |
|  Furniture, Appliances & Electronics | 8.0 | 19.8 | -3.6% | -10.9% | 11.4% | 6.0% |
|  Health Goods & Services | 3.6 | 4.0 | -15.0% | 3.7% | -4.1% | -7.5% |
|  Home & Building Supplies | 2.9 | 0.7 | -14.9% | -14.4% | -18.8% | -7.8% |
|  Books & Stationery Stores | 4.5 | 3.1 | 10.8% | -5.4% | -11.3% | -1.1% |
|  Liquor Stores | 1.7 | 0.8 | 1.2% | -1.2% | -11.1% | 6.5% |
|  Recreation & Entertainment | 37.0 | 40.5 | -0.2% | -13.6% | -36.6% | 11.7% |
|  Supermarkets & Food Retailers | 29.9 | 5.0 | 5.5% | -4.5% | 15.4% | -13.5% |
|  Travel & Accommodation | 111.7 | 92.3 | 3.1% | -8.9% | 0.2% | -1.5% |
|  Total Retail Spend | 214.0 | 188.3 | 1.5% | -9.7% | -8.1% | 2.7% |

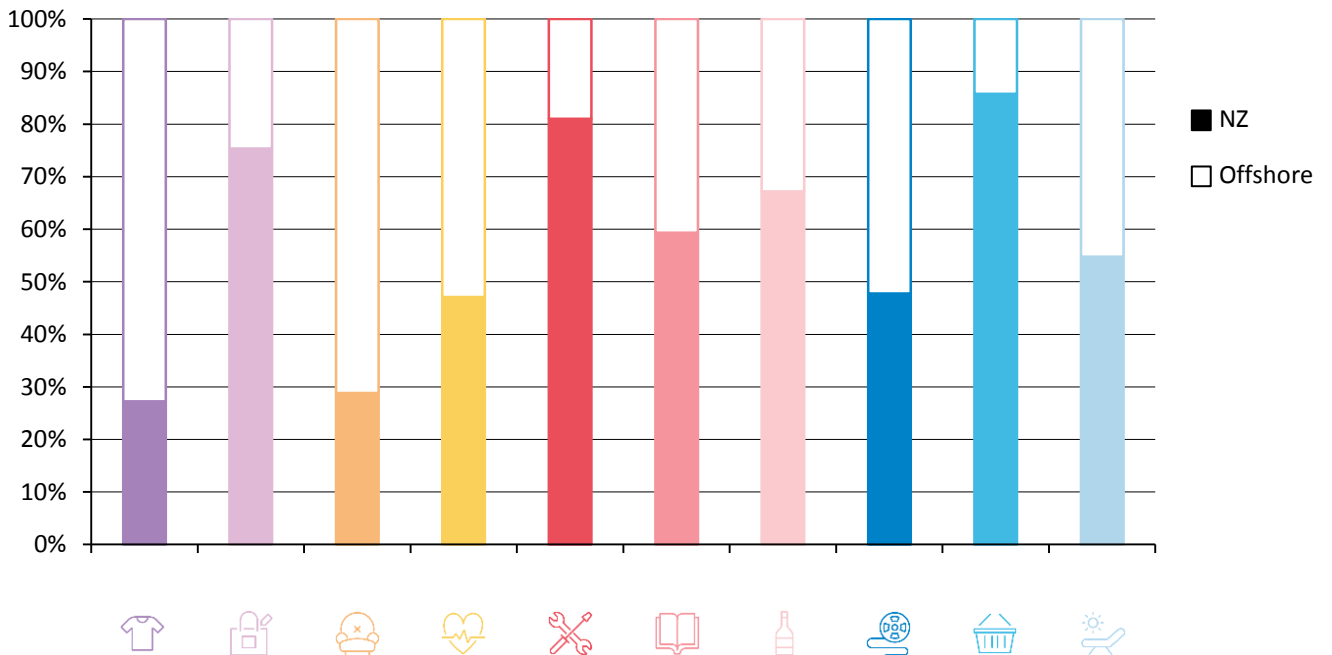
Online retailer total revenue by category (\$M)



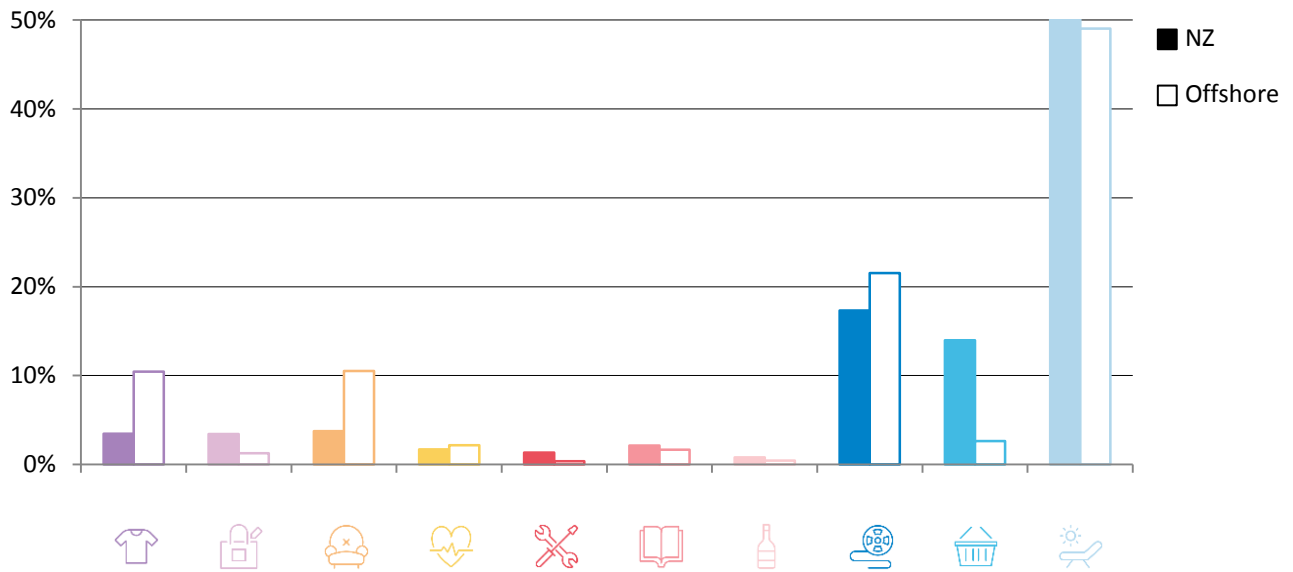
Monthly online revenue change year-on-year



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



Disclaimer

While every effort has been made to ensure the accuracy of Retailwatch, Datamine is not responsible for, and expressly disclaims all liability for, damages of any kind arising out of use, reference to, or reliance on any information contained in Retailwatch.

+64 9 303 2300

0800 DATAMINE 0800 328 264

retailwatch@datamine.com

www.datamine.com