
















## Value of electronic card transactions within retail categories

Period ending 28/11/2016

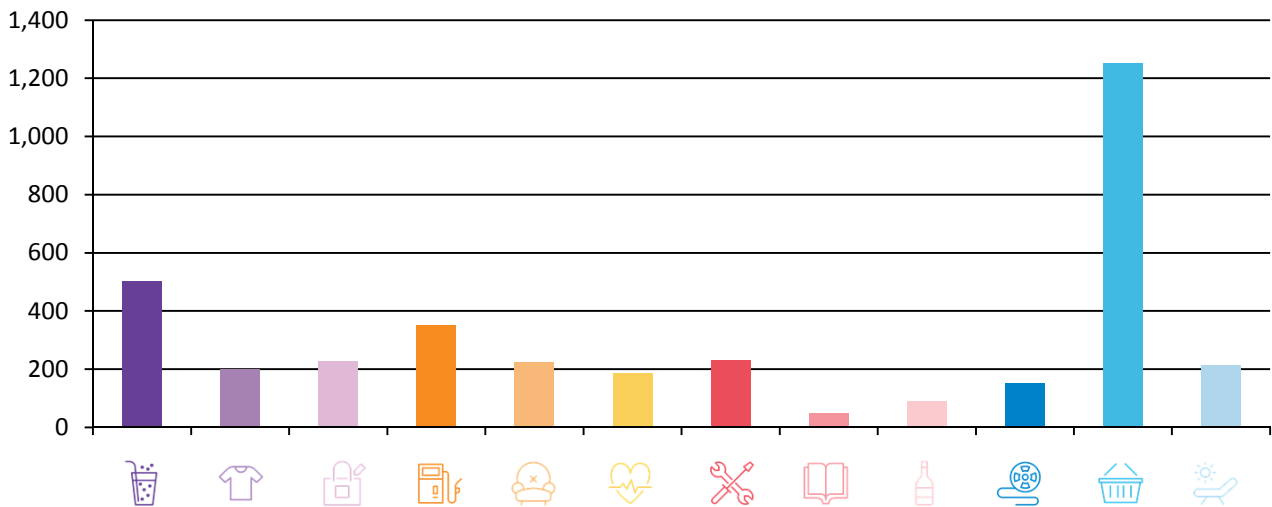
Total retail spend in New Zealand for the 28 days ending 28 November 2016 was \$3.7 billion. This is an increase of 3.0% compared to the previous month and an increase of 2.7% compared to the same period last year.

The greatest increases in month on month spend were in Department Stores (+19.3%) and Books & Stationery Stores (+13.5%). Despite these increases in spend compared to the previous month, year on year spend decreased for both these categories. Department Stores spend decreased by 4.0% and Books & Stationery Stores spend decreased by 4.2% compared to the same period last year.

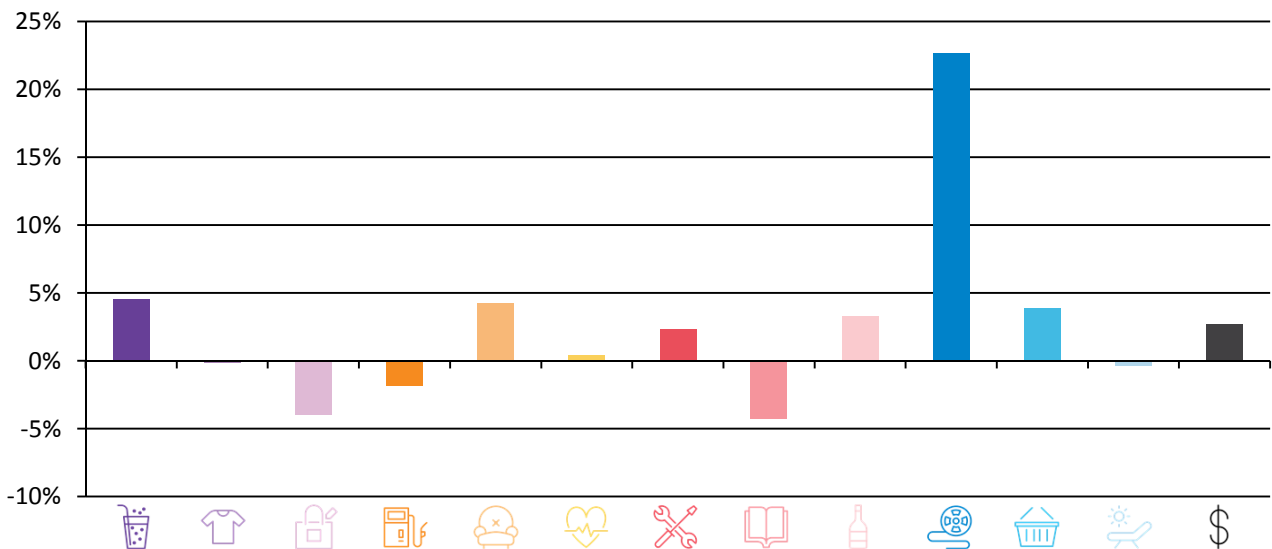
Categories with the greatest increases in year on year spend were Recreation & Entertainment (+22.6%), Cafés, Restaurants & Bars (+4.5%) and Furniture, Appliances & Electronics (+4.2%).

| Retailer Category                                                                                                       | Month Total \$M | % Change vs Prior Month | % Change vs Last Year | % Share     |
|-------------------------------------------------------------------------------------------------------------------------|-----------------|-------------------------|-----------------------|-------------|
|  Cafés, Restaurants & Bars           | 502             | 0.1%                    | 4.5%                  | 13.6%       |
|  Clothing & Footwear                 | 199             | 5.2%                    | -0.1%                 | 5.4%        |
|  Department Stores                   | 228             | 19.3%                   | -4.0%                 | 6.2%        |
|  Fuel & Service Stations             | 352             | 1.7%                    | -1.8%                 | 9.6%        |
|  Furniture, Appliances & Electronics | 225             | 6.2%                    | 4.2%                  | 6.1%        |
|  Health Goods & Services             | 186             | 6.5%                    | 0.4%                  | 5.0%        |
|  Home & Building Supplies            | 230             | -2.0%                   | 2.3%                  | 6.3%        |
|  Books & Stationery Stores           | 48              | 13.5%                   | -4.2%                 | 1.3%        |
|  Liquor Stores                       | 91              | 6.5%                    | 3.3%                  | 2.5%        |
|  Recreation & Entertainment          | 152             | -1.5%                   | 22.6%                 | 4.1%        |
|  Supermarkets & Food Retailers       | 1,253           | 2.9%                    | 3.9%                  | 34.1%       |
|  Travel & Accommodation              | 214             | -4.5%                   | -0.3%                 | 5.8%        |
|  <b>TOTAL RETAIL SPEND</b>           | <b>3,680</b>    | <b>3.0%</b>             | <b>2.7%</b>           | <b>100%</b> |

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



## Change vs last year



## Quarterly summary

### November 2016














The total quarterly retail spend for the 91 days ending 28 November 2016 was \$11.6 billion. This is an increase of 4.9% when compared to the previous quarter and an increase of 3.0% when compared to the same period last year.

When compared to the previous quarter, spend again increased the most in the Home & Building Supplies (+12.1%) and Recreation & Entertainment (+12.1%) categories this month. The only categories where spend decreased when compared to the previous quarter were Books & Stationery Stores (-0.7%) and Health Goods & Services (-0.1%).

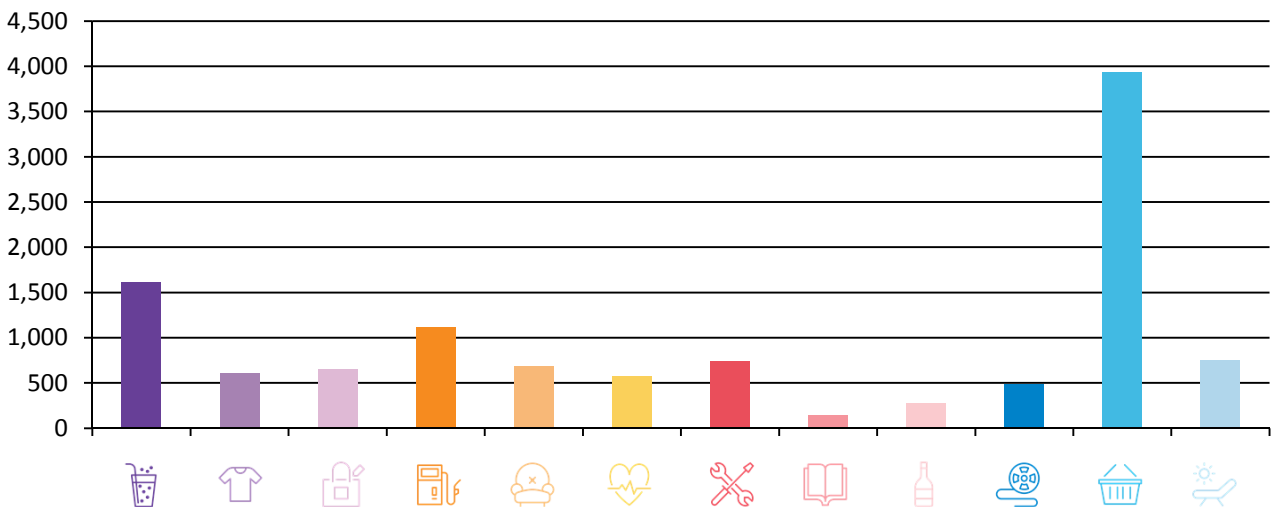
The greatest increase in spend when compared to the same quarter last year was again in the Recreation & Entertainment category with spend up by 16.5% year on year. Other categories where spend increased compared to the same quarter last year include Travel & Accommodation (+7.2%), Cafés, Restaurants & Bars (+6.3%) and Home & Building Supplies (+4.7%). Books & Stationery Stores (-5.3%), Fuel & Service Stations (-3.7%) and Department Stores (-2.0%) were the only categories where spend decreased when compared to the same quarter last year.

## Quarterly summary

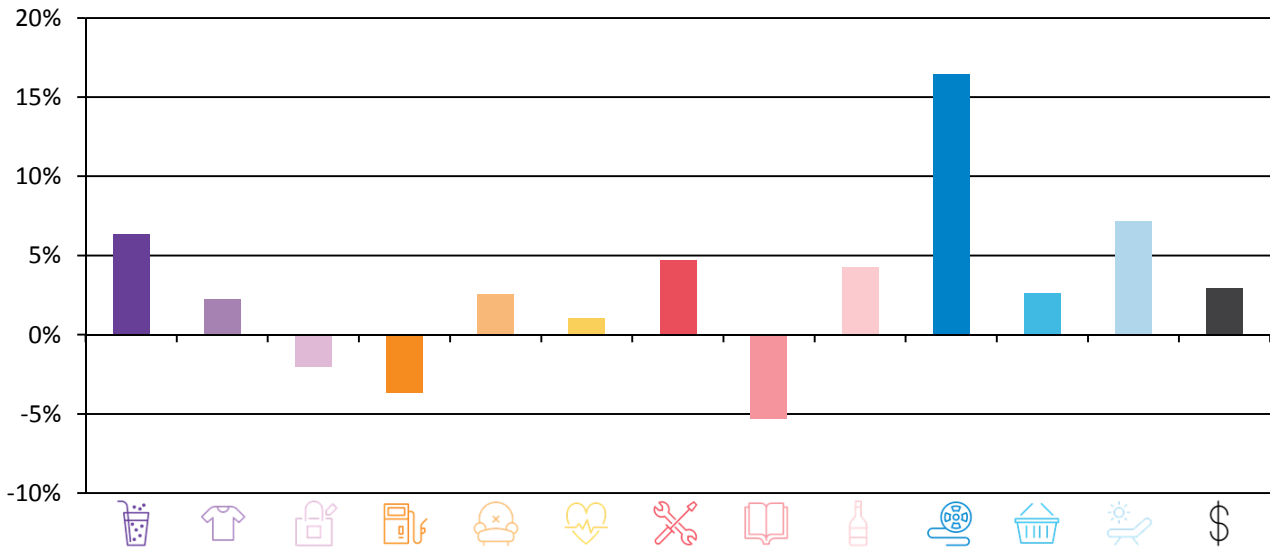
November 2016

| Retailer Category                                                                                                     | Quarter Total \$M | % Change vs Prior Quarter | % Change vs Last Year | % Share     |
|-----------------------------------------------------------------------------------------------------------------------|-------------------|---------------------------|-----------------------|-------------|
|  Cafés, Restaurants & Bars           | 1,621             | 1.7%                      | 6.3%                  | 14.0%       |
|  Clothing & Footwear                 | 604               | 2.4%                      | 2.3%                  | 5.2%        |
|  Department Stores                   | 650               | 6.9%                      | -2.0%                 | 5.6%        |
|  Fuel & Service Stations             | 1,113             | 2.4%                      | -3.7%                 | 9.6%        |
|  Furniture, Appliances & Electronics | 689               | 6.1%                      | 2.6%                  | 5.9%        |
|  Health Goods & Services             | 580               | -0.1%                     | 1.0%                  | 5.0%        |
|  Home & Building Supplies            | 744               | 21.6%                     | 4.7%                  | 6.4%        |
|  Books & Stationery Stores           | 145               | -0.7%                     | -5.3%                 | 1.2%        |
|  Liquor Stores                       | 278               | 8.3%                      | 4.3%                  | 2.4%        |
|  Recreation & Entertainment         | 483               | 12.1%                     | 16.5%                 | 4.2%        |
|  Supermarkets & Food Retailers     | 941               | 4.0%                      | 2.6%                  | 34.0%       |
|  Travel & Accommodation            | 751               | 5.6%                      | 7.2%                  | 6.5%        |
|  <b>TOTAL RETAIL SPEND</b>         | <b>11,597</b>     | <b>4.9%</b>               | <b>3.0%</b>           | <b>100%</b> |

## Quarterly spend by category (\$M)



## Change vs last year



## Selected regions of interest

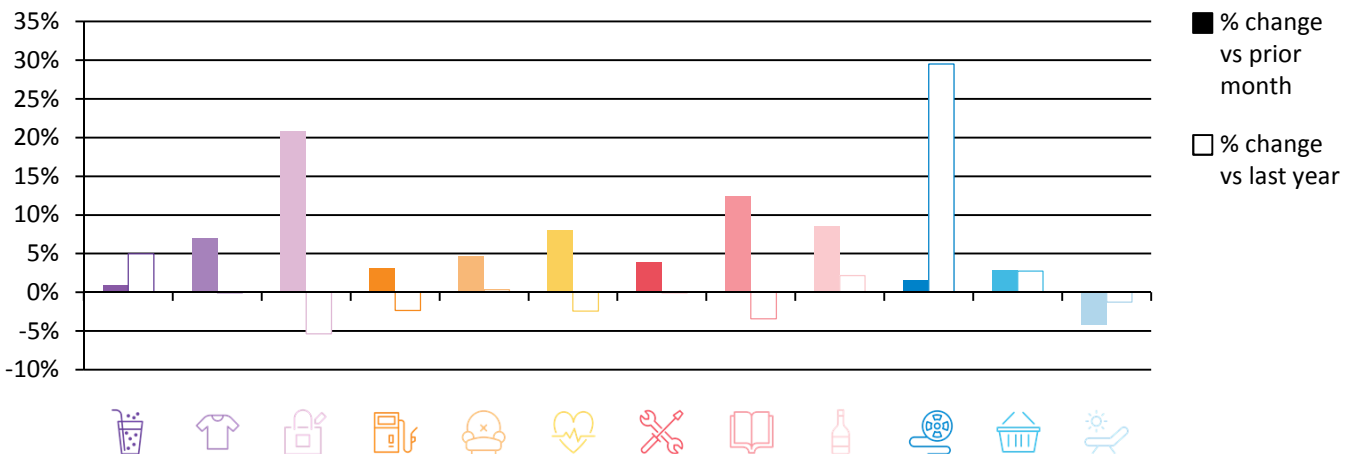
November 2016

### Monthly trends Auckland

The greatest increases in month on month spend in Auckland were in Department Stores (+20.8%), Books & Stationery Stores (+12.4%) and Liquor Stores (+8.5%), following national trends.

The only category where spend decreased compared to both the previous month and previous year is Travel & Accommodation, down 4.3% and 1.3%, respectively.

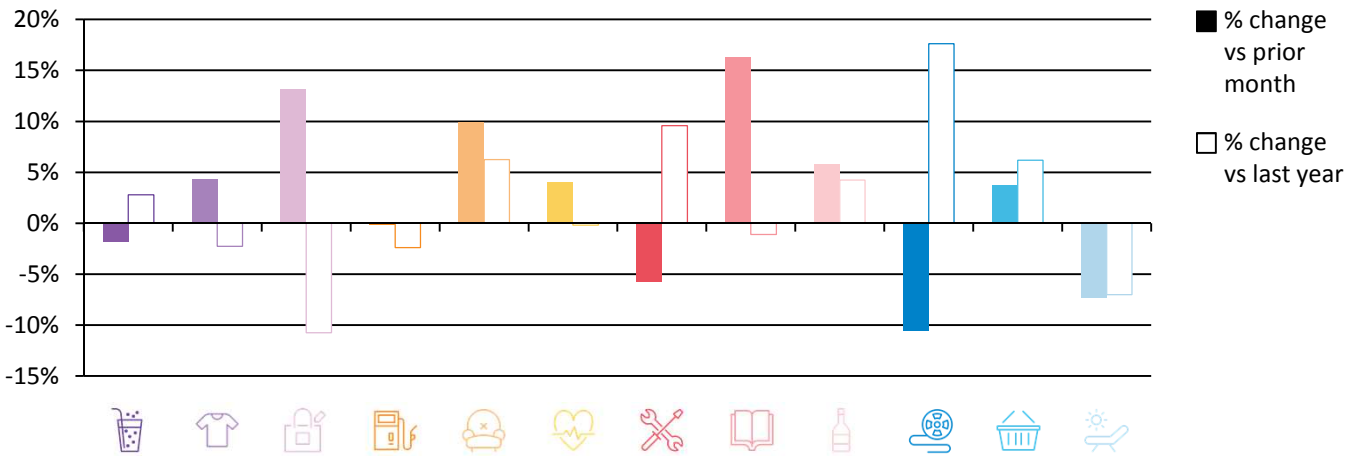
The Auckland region saw a significant increase in year on year Recreation & Entertainment spend (+29.5%). The only other categories to see an increase in spend when compared to the same period last year were Cafés, Restaurants & Bars (+5.0%), Supermarkets & Food Retailers (+2.8%) and Liquor Stores (+2.2%). Other categories saw moderate decreases in spend. The greatest decrease was in Department Stores spend, down 5.4% year on year.



### Monthly trends Wellington

The Wellington region experienced significant increases in month on month spend in Books & Stationery Stores (+16.3%), Department Stores (+13.2%) and Furniture, Appliances & Homewares (+10.0%) categories. Furniture, Appliances & Homewares spend also increased when compared to the same period last year, up 6.2%.

Other categories where spend increased year on year in the Wellington region include Recreation & Entertainment (+17.6%), Home & Building Supplies (+9.6%) and Supermarkets & Food Retailers (+6.2%). The greatest decreases in spend when compared to the same period last year were in Department Stores (-10.7%) and Travel & Accommodation (-7.0%) categories.



### Monthly trends Otago

Otago’s greatest increases in month on month spend were also in Books & Stationery Stores (+17.5%), Department Stores (+16.0%) and Furniture, Appliances & Homewares (+10.3%) categories.

The region saw significant increases in year on year spend in Furniture, Appliances & Homewares (+12.7%), Travel & Accommodation (+11.3%) and Recreation & Entertainment (+9.3%).

There were decreases in year on year spend in Department Stores (-2.1%), Books & Stationery Stores (-1.4%) and Fuel & Service Stations (-0.6%).



## ↑ Going up this month

The greatest increase in year on year spend was again in Recreation & Entertainment (+22.6%)

The Nelson region saw the greatest increase in overall spend compared to the same period last year (+5.8%)

7

Categories up

15

Regions up

## ↓ Going down this month

The greatest decrease in year on year spend was in Books & Stationery Stores (-4.2%)

Taranaki was the only region where overall spend compared to the same period last year decreased (-3.1%)

5

Categories down

1

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 28/11/2016

Total online spend for the 28 days ending 28 November 2016 is \$334 million which represents an increase of 4.8% against the previous month and 13.8% against the same period last year. The greatest increases in month on month spend were in Liquor Stores (+31.3%), Clothing & Footwear (+28.8%) and Department Stores (+26.4%). These categories also saw significant increases in year on year spend. The only category to see a decrease in spend when compared to the previous month was Travel & Accommodation (-6.9%). Year on year, Travel & Accommodation spend is up by 1.9%.

The greatest increases in year on year spend were in the Recreation & Entertainment (+37.0%), Clothing & Footwear (+28.2%) and Department Stores (+27.8%) categories. Categories where online spend decreased compared to the same period last year were Books & Stationery Stores (-7.7%), Home & Building Supplies (-3.4%) and Health Goods & Services (-1.8%).

| Online Retailer Category                                                                                             | Month Total \$M | % Change vs Prior Month | % Change vs Last Year | % Share    |
|----------------------------------------------------------------------------------------------------------------------|-----------------|-------------------------|-----------------------|------------|
|  Clothing & Footwear              | 29.2            | 28.8%                   | 28.2%                 | 8.7        |
|  Department Stores                | 12.7            | 26.4%                   | 27.8%                 | 3.8        |
|  Furniture/Appliances/Electronics | 26.2            | 14.9%                   | 25.0%                 | 7.8        |
|  Health Goods & Services          | 6.7             | 11.2%                   | -1.8%                 | 2.00       |
|  Home & Building Supplies         | 3.5             | 24.6%                   | -3.4%                 | 1.05       |
|  Books & Stationery Stores        | 8.7             | 15.6%                   | -7.7%                 | 2.59       |
|  Liquor Stores                    | 2.5             | 31.3%                   | 19.6%                 | 0.74       |
|  Recreation & Entertainment       | 66.1            | 15.8%                   | 37.0%                 | 19.8       |
|  Supermarkets/Food Retailers      | 30.2            | 5.1%                    | 24.6%                 | 9.0        |
|  Travel & Accommodation           | 148.4           | -6.9%                   | 1.9%                  | 44.4       |
|  <b>Total Online Retail Spend</b> | <b>334.2</b>    | <b>4.8%</b>             | <b>13.8%</b>          | <b>100</b> |

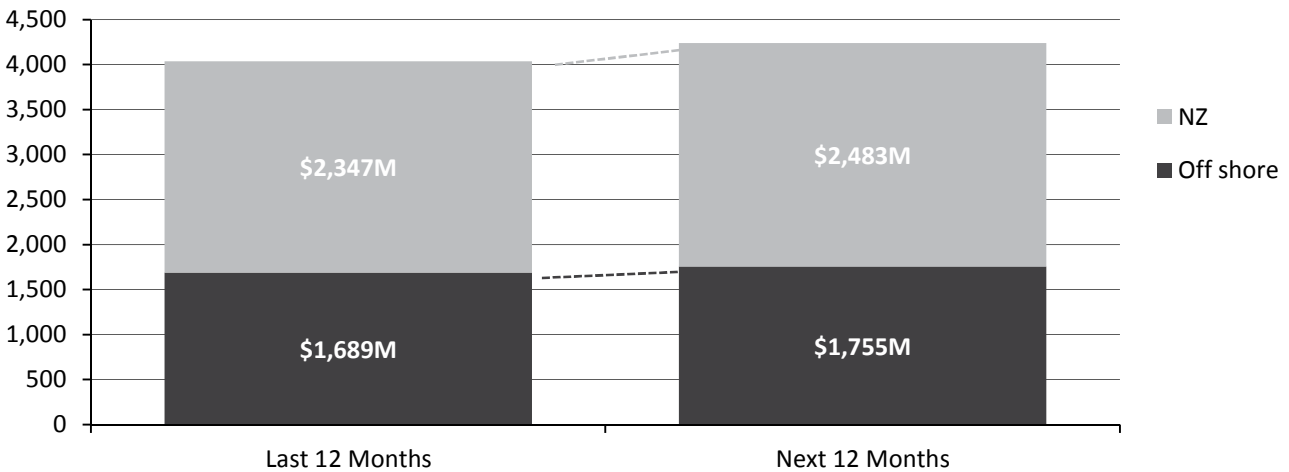
## Online: New Zealand vs Off Shore

New Zealand merchants accounted for 61.0% of online spend representing an 8.6% increase compared to the previous month and a 14.6% increase against the same period last year.

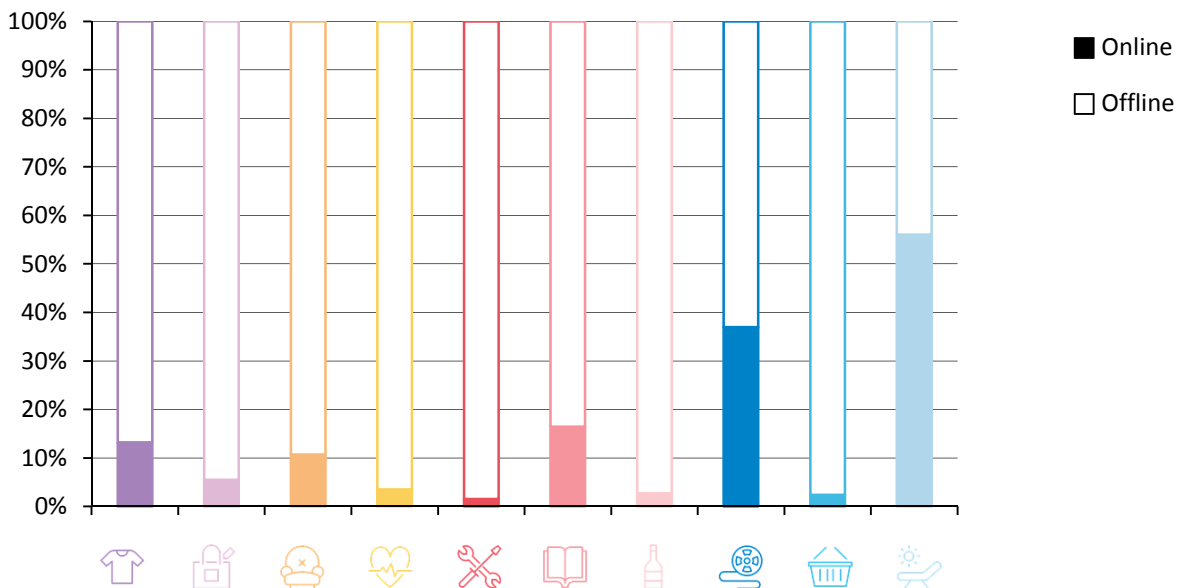
For New Zealand merchants the greatest increases in spend compared to the previous month were in Department Stores (40.6%) and Liquor Stores (+39.7%). The greatest increases compared to the same period last year were in Recreation & Entertainment (+34.9%) and Supermarkets & Food Retailers (+29.9%). Categories where spend decreased year on year were Books & Stationery Stores (-15.3%), Health Goods & Services (-8.1%) and Home & Building Supplies (-7.4%).

Spend with Off Shore merchants decreased by 0.7% when compared to the previous month and increased 12.6% compared to the same period last year. Spend with Off Shore merchants increased the most in the Department Stores (+52.7%), Recreation & Entertainment (+40.3%) and Furniture, Appliances & Electronics (+36.6%) categories year on year. Categories where spend decreased year on year for Off Shore merchants were Travel & Accommodation (-7.0%) and Supermarkets & Food Retailers (-1.6%).

## Projected total online spend (\$M)














## % share of category spend



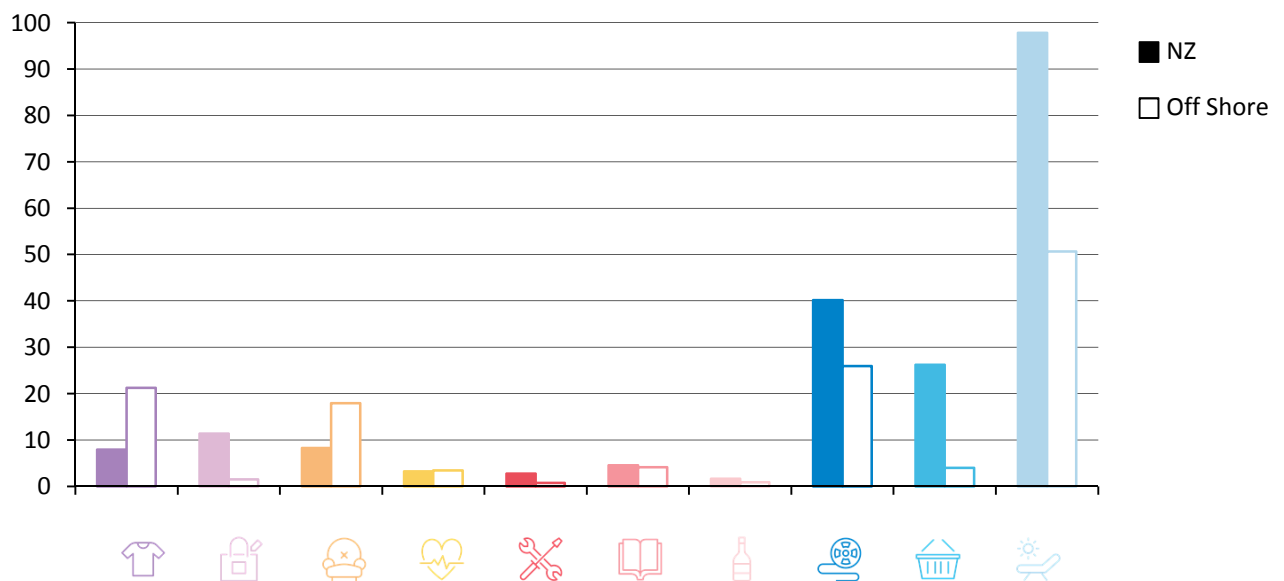


# Online retail market summary New Zealand vs Off Shore merchants

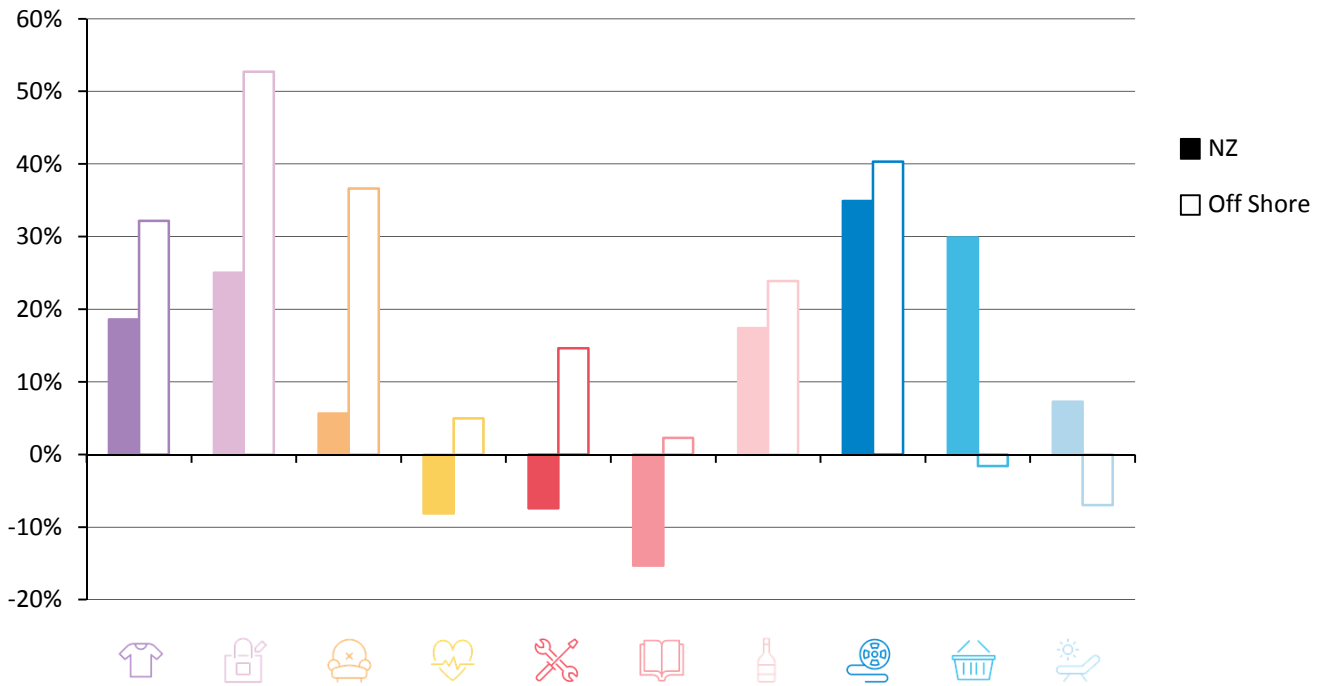
November 2016

| Retailer Category                                                                                                  | Month Total \$M |              | % Change vs Prior Month |              | % Change vs Last Year |              |
|--------------------------------------------------------------------------------------------------------------------|-----------------|--------------|-------------------------|--------------|-----------------------|--------------|
|                                                                                                                    | NZ              | Off Shore    | NZ                      | Off Shore    | NZ                    | Off Shore    |
|  Clothing & Footwear              | 7.9             | 21.2         | 27.1%                   | 29.4%        | 18.6%                 | 32.2%        |
|  Department Stores                | 11.4            | 1.5          | 40.6%                   | -27.9%       | 25.0%                 | 52.7%        |
|  Furniture/Appliances/Electronics | 8.3             | 17.9         | 29.3%                   | 9.2%         | 5.6%                  | 36.6%        |
|  Health Goods & Services          | 3.2             | 3.5          | -6.4%                   | 34.9%        | -8.1%                 | 5.0%         |
|  Home & Building Supplies         | 2.7             | 0.8          | 33.1%                   | 1.3%         | -7.4%                 | 14.6%        |
|  Books & Stationery Stores        | 4.5             | 4.1          | 8.6%                    | 24.4%        | -15.3%                | 2.3%         |
|  Liquor Stores                    | 1.6             | 0.9          | 39.7%                   | 17.8%        | 17.4%                 | 23.9%        |
|  Recreation & Entertainment       | 40.2            | 25.9         | 33.1%                   | -3.6%        | 34.9%                 | 40.3%        |
|  Supermarkets/Food Retailers      | 26.2            | 4.0          | 4.8%                    | 7.4%         | 29.9%                 | -1.6%        |
|  Travel & Accommodation          | 97.8            | 50.7         | -3.1%                   | -13.5%       | 7.3%                  | -7.0%        |
|  <b>Total Retail Spend</b>      | <b>203.8</b>    | <b>130.4</b> | <b>8.6%</b>             | <b>-0.7%</b> | <b>14.6%</b>          | <b>12.6%</b> |

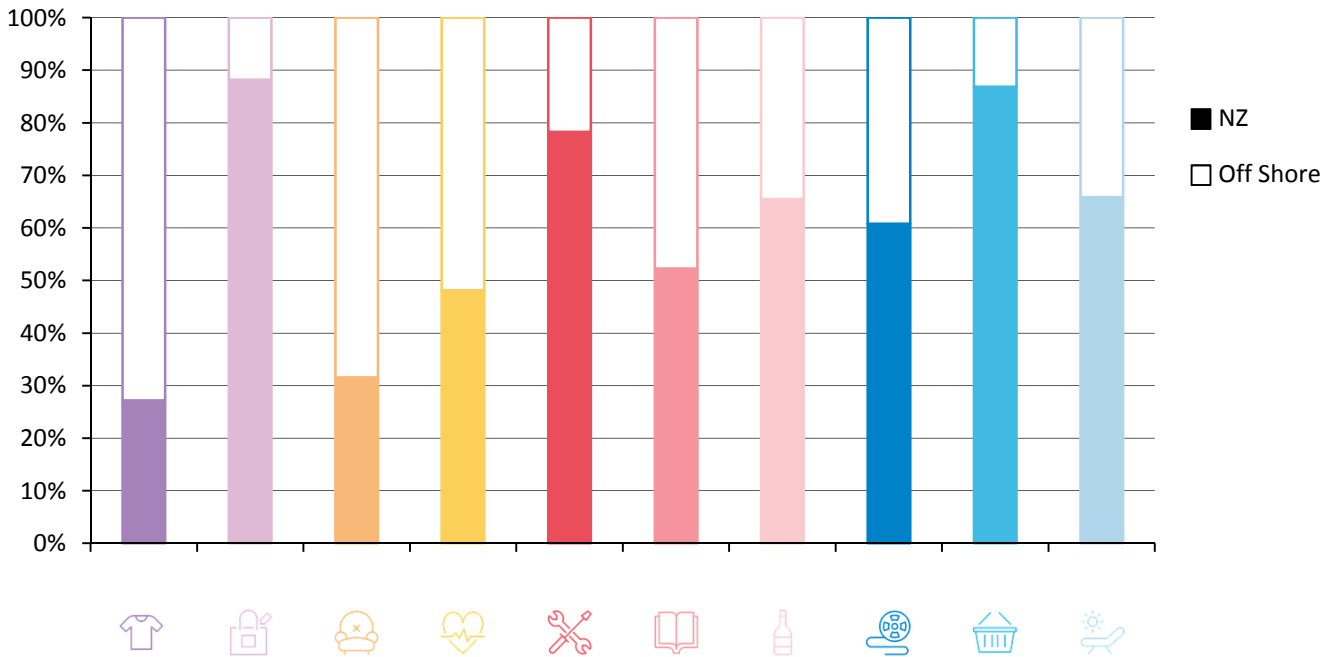
## Online retailer total revenue by category (\$M)



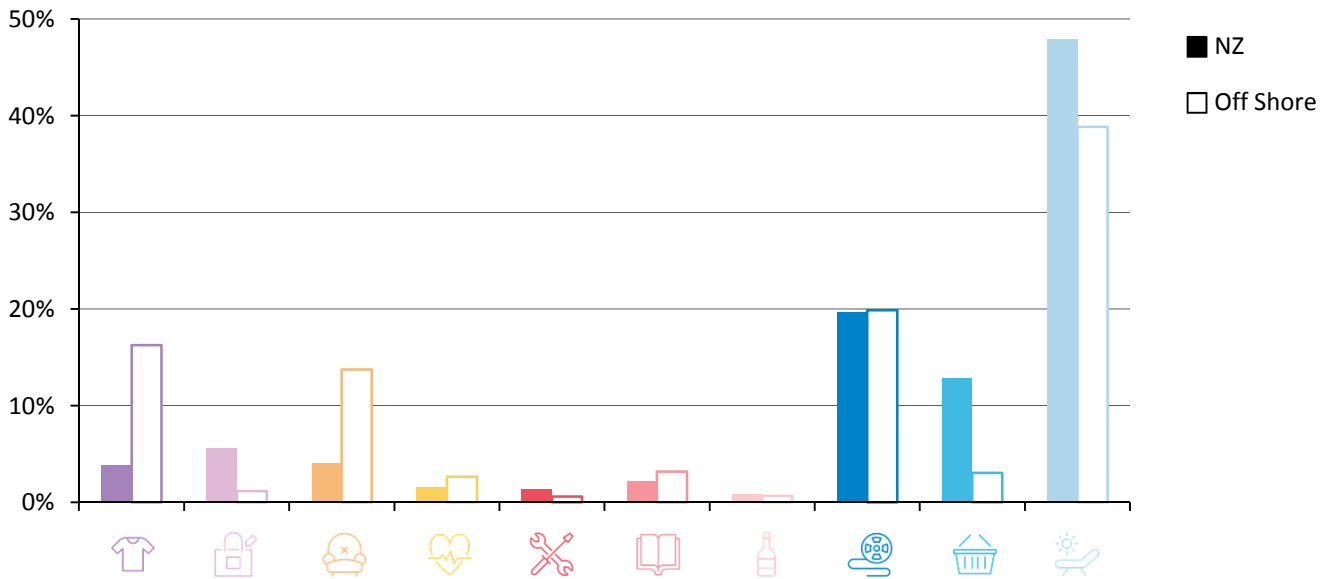
## Monthly online revenue change YOY



## 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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