



# Retailwatch














## Value of electronic card transactions within retail categories

Period ending 28/01/2018

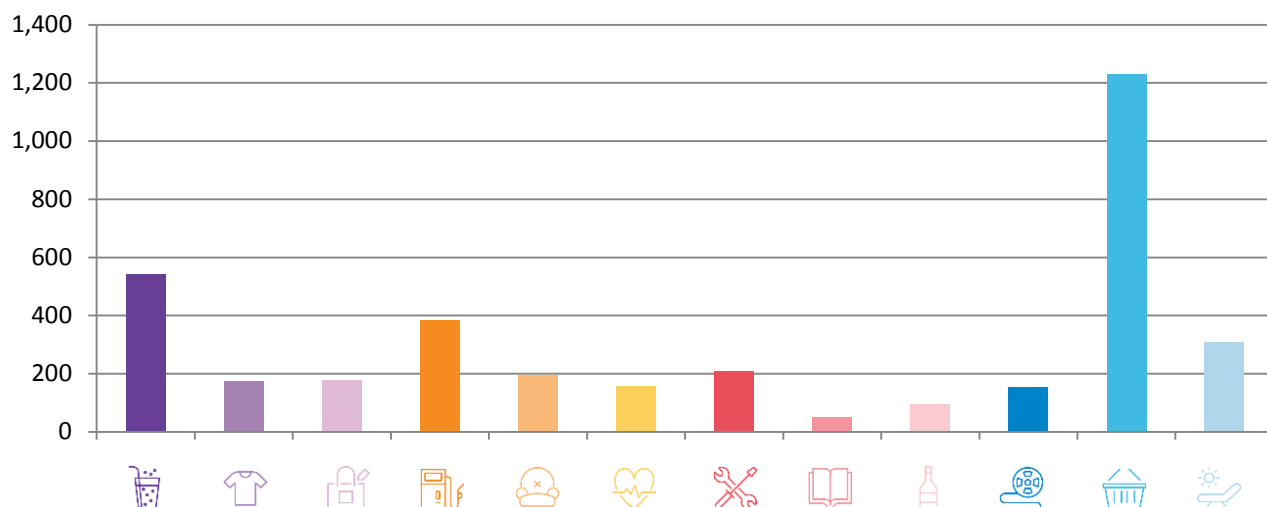
Total retail spend in New Zealand for the 28 days ending 28 January 2018 was \$3.66 billion. This was a decrease of 18.3% compared to December and an increase of 3.0% when compared to the same period last year.

Spending was up in nine categories year-on-year, with Furniture, Appliances & Electronics (+6.3%) showing the greatest increase, followed by Liquor Stores (+6.1%). The Books & Stationery Stores category exhibited the greatest decrease year-on-year, declining 2.6%. This was followed by the Department Stores category, down 2.1%.

Month-on-month, eleven of the twelve categories experienced decreases in spend. The largest decreases were seen in the Department Stores, Furniture, Appliances & Electronics and Clothing & Footwear categories, decreasing by 53.1%, 38.5% and 37.1% respectively. The only month-on-month increase was seen in the Travel & Accommodation category, up 41.5%.

Retailer Category	Month Total \$M	% Change vs Prior Month	% Change vs Last Year	% Share
 Cafés, Restaurants & Bars	540	-9.6%	4.5%	14.7%
 Clothing & Footwear	175	-38.5%	-2.0%	4.8%
 Department Stores	177	-53.1%	-2.1%	4.8%
 Fuel & Service Stations	382	-7.8%	5.6%	10.4%
 Furniture, Appliances & Electronics	194	-37.1%	6.3%	5.3%
 Health Goods & Services	157	-22.1%	2.5%	4.3%
 Home & Building Supplies	207	-24.1%	1.0%	5.7%
 Books & Stationery Stores	51	-30.3%	-2.6%	1.4%
 Liquor Stores	95	-32.3%	6.1%	2.6%
 Recreation & Entertainment	153	-6.3%	4.4%	4.2%
 Supermarkets & Food Retailers	1,228	-14.4%	2.0%	33.5%
 Travel & Accommodation	307	41.5%	5.7%	8.4%
 <b>TOTAL RETAIL SPEND</b>	<b>3,666</b>	<b>-18.3%</b>	<b>3.0%</b>	<b>100%</b>

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



## Change vs last year



## Quarterly summary

### January 2018













The total quarterly retail spend for the 91 days ending 28 January 2018 was \$12.99 billion. This was an increase of 11.8% when compared to the previous quarter and an increase of 1.7% when compared to the same period last year.

Eight of the twelve categories experienced an increase in spend when compared to the previous quarter. The largest increase in spending was in the Fuel & Service Stations category (+6.1%), followed by Liquor Stores (+5.7%). The largest decrease in spend was seen in Books & Stationery Stores category, declining 5.6%.

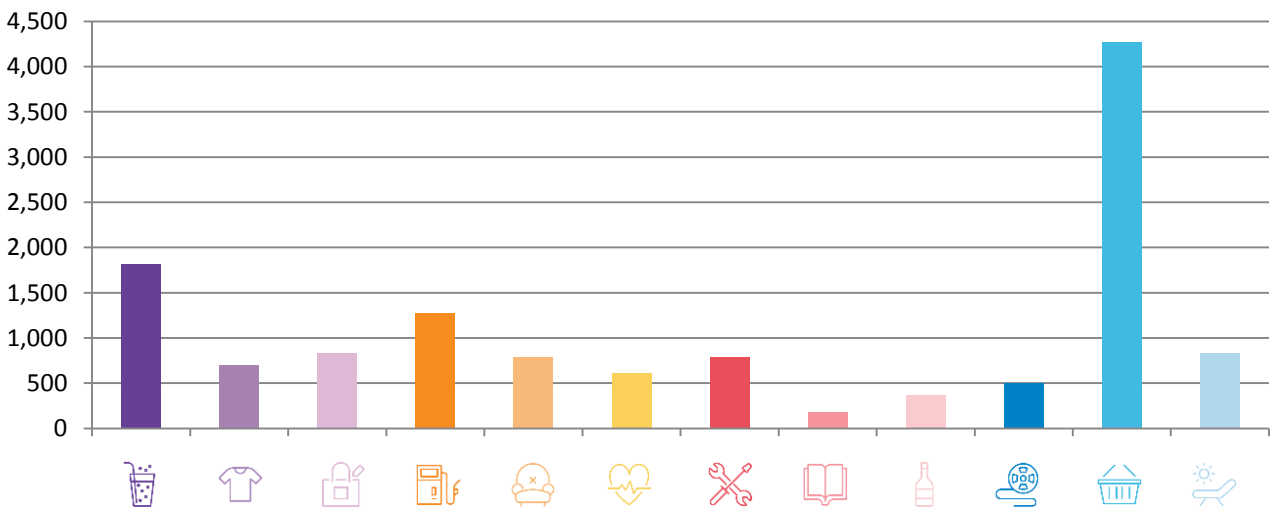
Compared to the same quarter of the previous year, spending increased in eleven of the twelve categories, with Department Stores showing the greatest increase, up 46.3%, followed by Books & Stationery Stores (+37.4%). Health Goods & Services (-7.2%) showed the only decrease year-on-year, declining 2.8%.

# Quarterly summary

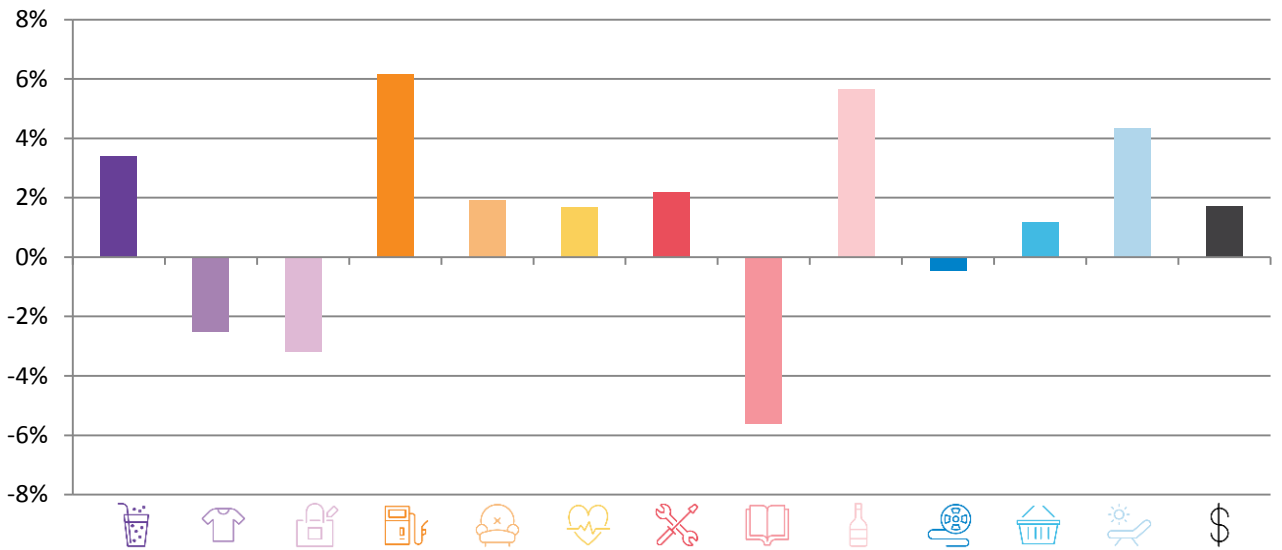
January 2018

Retailer Category	Quarter Total \$M	% Change vs Prior Quarter	% Change vs Last Year	% Share
 Cafés, Restaurants & Bars	1,822	3.6%	3.4%	14.0%
 Clothing & Footwear	704	27.3%	-2.5%	5.4%
 Department Stores	836	46.3%	-3.2%	6.4%
 Fuel & Service Stations	1,274	13.2%	6.1%	9.8%
 Furniture, Appliances & Electronics	789	24.2%	1.9%	6.1%
 Health Goods & Services	607	-2.8%	1.7%	4.7%
 Home & Building Supplies	793	14.8%	2.2%	6.1%
 Books & Stationery Stores	182	37.4%	-5.6%	1.4%
 Liquor Stores	368	27.5%	5.7%	2.8%
 Recreation & Entertainment	506	4.9%	-0.4%	3.9%
 Supermarkets & Food Retailers	4,274	7.6%	1.2%	32.9%
 Travel & Accommodation	830	6.6%	4.4%	6.4%
<b>\$ TOTAL RETAIL SPEND</b>	<b>12,985</b>	<b>11.8%</b>	<b>1.7%</b>	<b>100%</b>

## Quarterly spend by category (\$M)



## Change vs last year



## Selected regions of interest

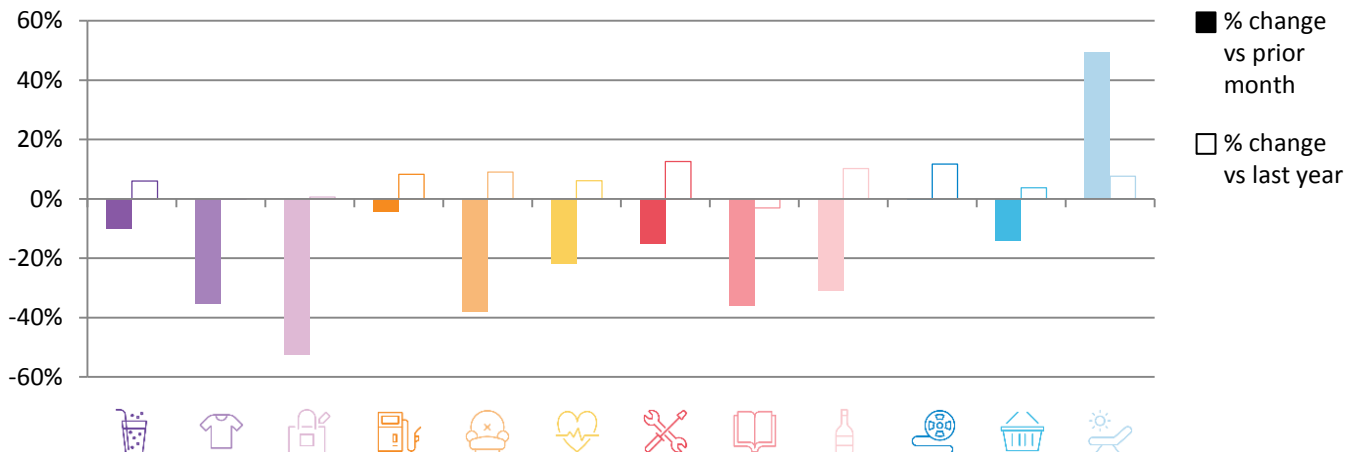
January 2018

### Monthly trends Wellington

Retail spend in the Wellington region for the 28 days ending 28/01/2018 was \$403.6 million. This represents a decrease of 16.6% from the previous month and an increase of 5.6% year-on-year.

Retail spending in the Wellington region increased in ten of the twelve categories compared to January last year. The greatest increase in year-on-year spend was seen in the Home & Building Supplies category (+12.6%), followed by Recreation & Entertainment (+11.7%). The greatest reduction in year-on-year spend was seen in the Books & Stationery Stores category (-3.1%).

Compared to December, eleven categories experienced a decrease in spend. The greatest of these decreases were exhibited in the Department Stores category (-52.4%), followed by Furniture, Appliances & Electronics (-38.0%). Travel & Accommodation (+49.4%) was the only category to experience a month-on-month increase in spend.

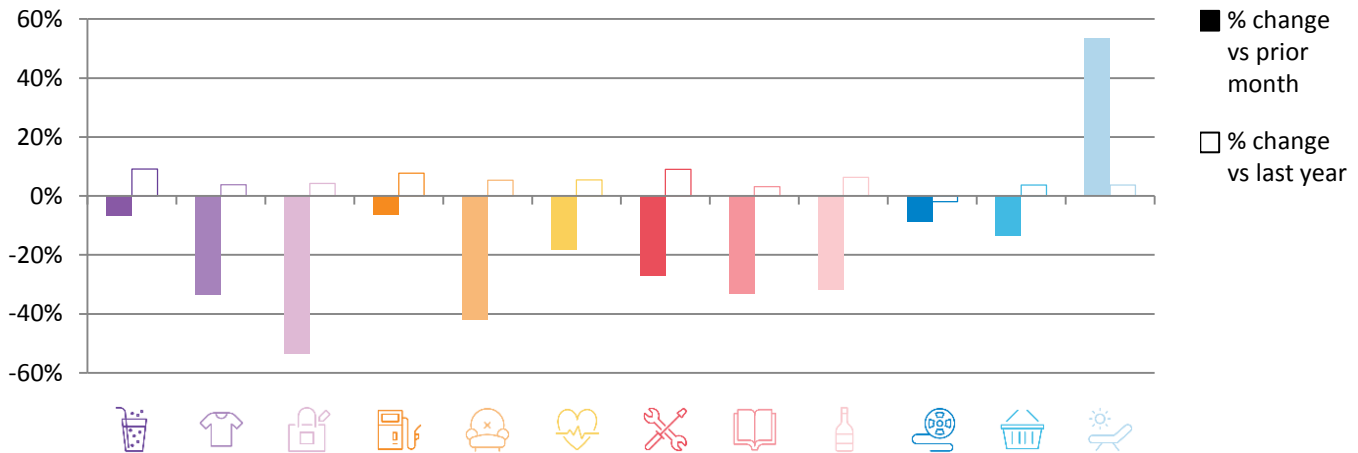


## Monthly trends Hawkes Bay

Retail spend in the Hawkes Bay region for the 28 days ending 28/01/2018 was \$117.2 million. This represents a decrease of 17.8% against the previous month and an increase of 5.2% year-on-year.

Compared to January 2017, spending was up in eleven categories, with Cafés, Restaurants, & Bars (+9.1%) experiencing the largest increase in spend, followed by Home & Building Supplies (+9.0%). Recreation & Entertainment (-2.0%) experienced the only decrease in year-on-year spend.

Month-on-month spend was down in eleven categories with Department Stores (-53.5%) experiencing the largest decrease in spend, followed by Furniture, Appliances & Electronics (-41.7%). The Travel & Accommodation category experienced the only increase in month-on-month spend, up 53.3%.

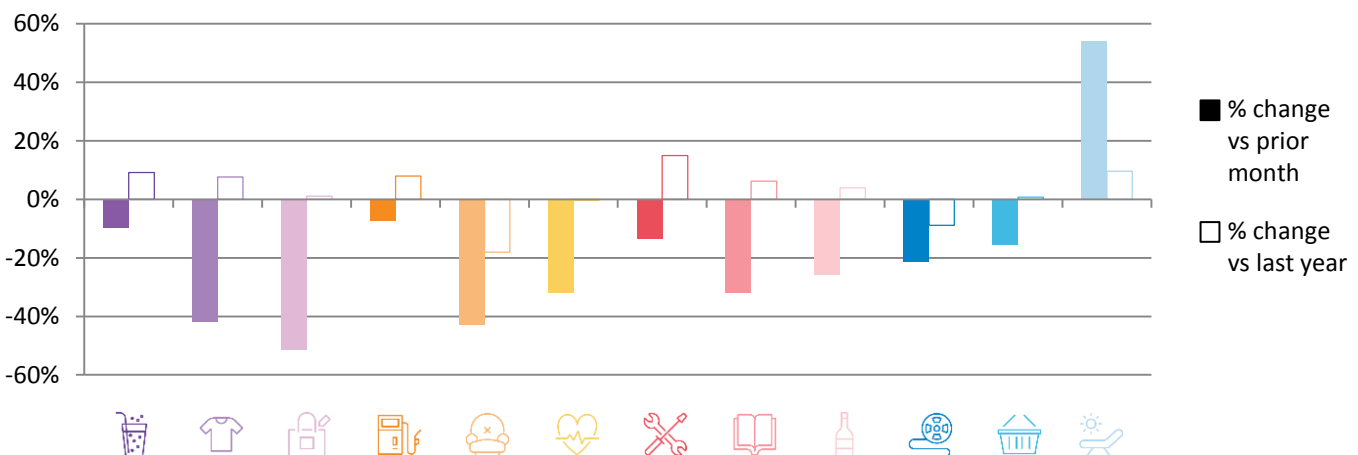


## Monthly trends Gisborne

Retail spend in the Gisborne region for the 28 days ending 28/01/2018 was \$32.2million. This represents a decrease of 19.1% against the previous month and an increase of 3.1% year-on-year.

Retail spending in the Gisborne region increased in nine of the twelve categories year-on-year. Home & Building Supplies (+14.9%) experienced the greatest increase in spend, followed by Travel & Accommodation (+9.6). The greatest decrease in spend was witnessed in the Furniture, Appliances & Electronics category, declining 18.0%.

Compared to December, eleven categories experienced decreases in spend. The Department Stores category led the way with a 51.4% decrease, followed by Furniture, Appliances & Electronics (-43.0%). The only increase was seen in the Travel & Accommodation category (+54.2%).



## Going up this month

The only increase in spending this month was seen in the Travel & Accommodation category, up 41.5%.

No regions experienced month-on-month increases in January.

## Going down this month

The largest decrease in spending this month was seen in the Department Stores category, down 53.1%.

The Auckland region experienced the greatest decrease in spend this month, down 19.7% when compared to December 2017.

1

Categories up

0

Regions up

11

Categories down

16

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 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 28/01/2018

Total online retail spend in New Zealand for the 28 days ending 28 January 2018 was \$393 million. This represents an increase of 15.6% year-on-year and an increase of 8.9% against the previous month.

Online spending was up in nine of the ten categories year-on-year. Home & Building Supplies (+47.6%) saw the greatest increase in spending, followed by Supermarkets/Food Retailers (+34.2%). The Health Goods & Services category (-2.6%) exhibited the only decrease in spend.

Month-on-month, nine of the ten categories experienced decreases in spend. The only increase in spend was exhibited by Travel & Accommodation (+47.0%). Liquor Stores (-42.6%) and Department Stores (-42.2%) saw the greatest decreases in spend month-on-month.

Online Retailer Category	Month Total \$M	% Change vs Prior Month	% Change vs Last Year	% Share
 Clothing & Footwear	24.2	-23.6%	12.0%	6.2%
 Department Stores	9.1	-42.2%	1.6%	2.3%
 Furniture, Appliances & Electronics	25.8	-22.2%	24.7%	6.6%
 Health Goods & Services	6.2	-26.8%	-2.6%	1.6%
 Home & Building Supplies	4.0	-7.0%	47.6%	1.0%
 Books & Stationery Stores	8.0	-24.3%	9.0%	2.0%
 Liquor Stores	2.1	-42.6%	14.3%	0.5%
 Recreation & Entertainment	74.8	-3.6%	20.8%	19.0%
 Supermarkets & Food Retailers	29.9	-10.9%	34.2%	7.6%
 Travel & Accommodation	209.1	47.0%	12.2%	53.2%
 <b>Total Online Retail Spend</b>	<b>393.3</b>	<b>8.9%</b>	<b>15.6%</b>	<b>100%</b>

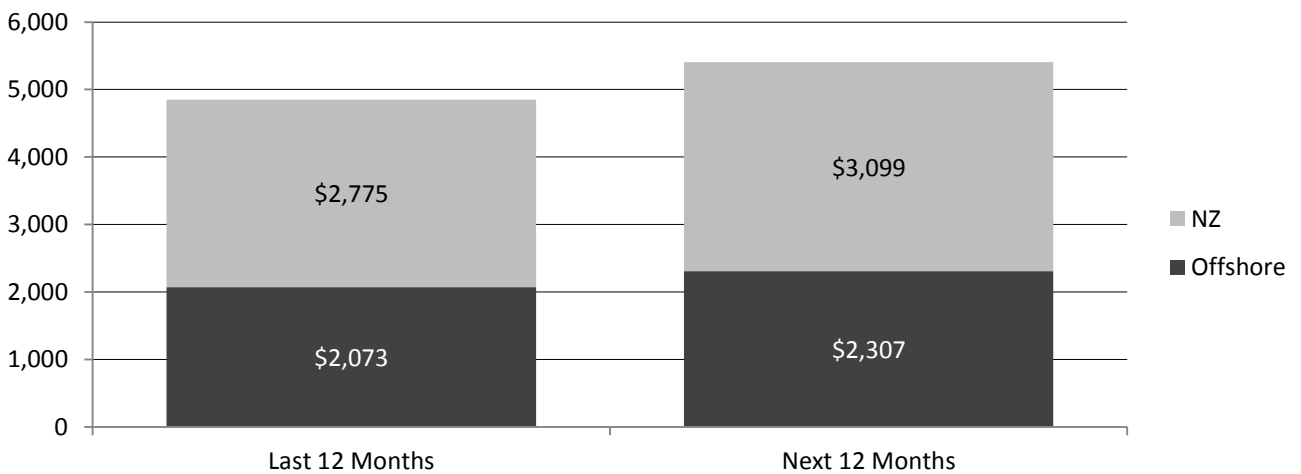
## Online: New Zealand vs Offshore

New Zealand merchants accounted for 59.3% of online spend for the month of January. This was an increase of 17.3% compared to the previous month and an increase of 15.5% compared to the previous year.

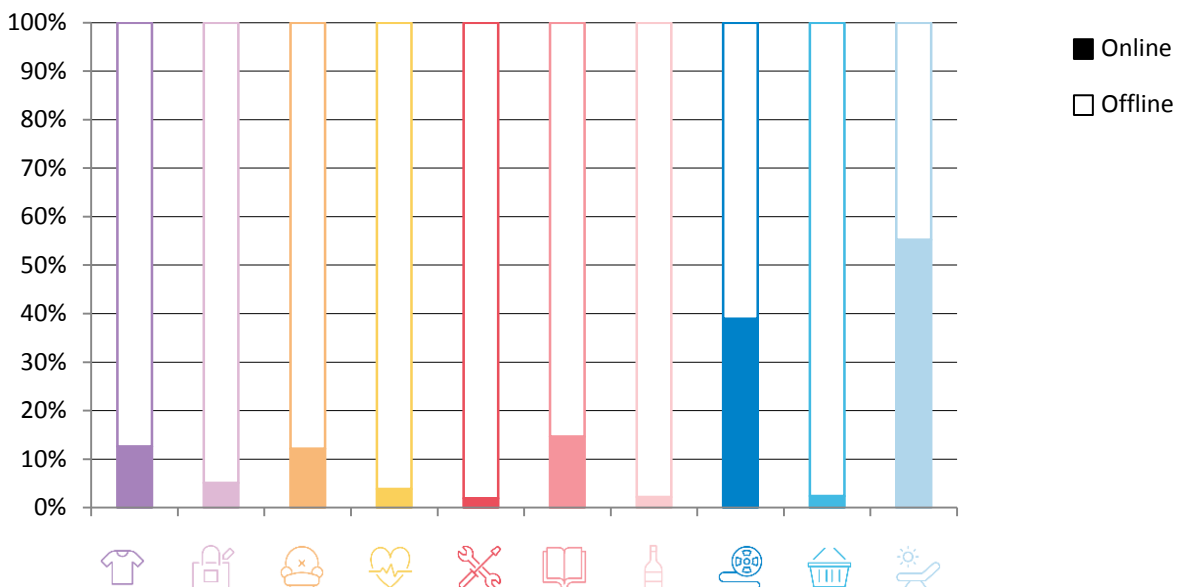
For New Zealand merchants, only two of the ten categories saw increases in spend compared to December, with Department Stores (-46.0%) and Furniture/Appliances/Electronics (-35.1%) experiencing the greatest decreases in spend. Travel & Accommodation and Recreation & Entertainment saw the greatest increases compared to December, going up 62.9% and 0.4% respectively. New Zealand merchants saw increases in all ten categories when compared to January 2017.

Spend at offshore retail decreased by 1.4% when compared to the previous month but increased by 15.9% when compared to the same period last year. Offshore merchants saw increases in spend in seven categories year-on-year, the largest in Furniture/Appliances/Electronics (+25.4%).

## Projected total online spend (\$M)














## % share of category spend



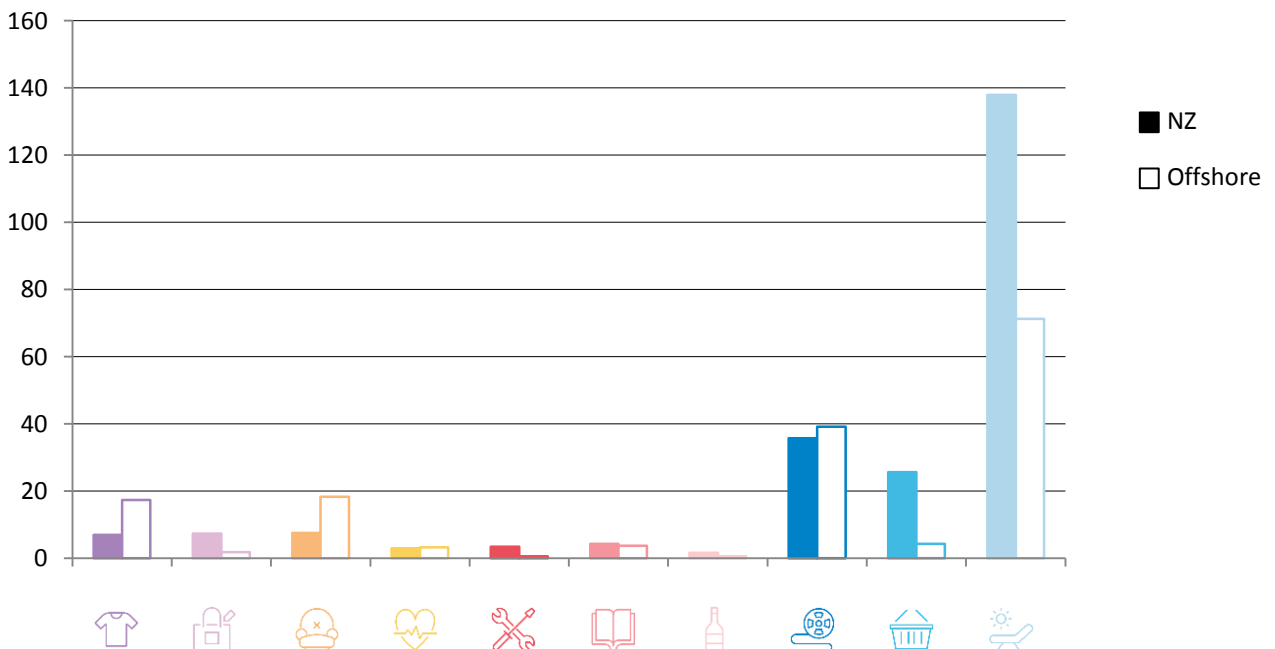


# Online retail market summary New Zealand vs Offshore merchants

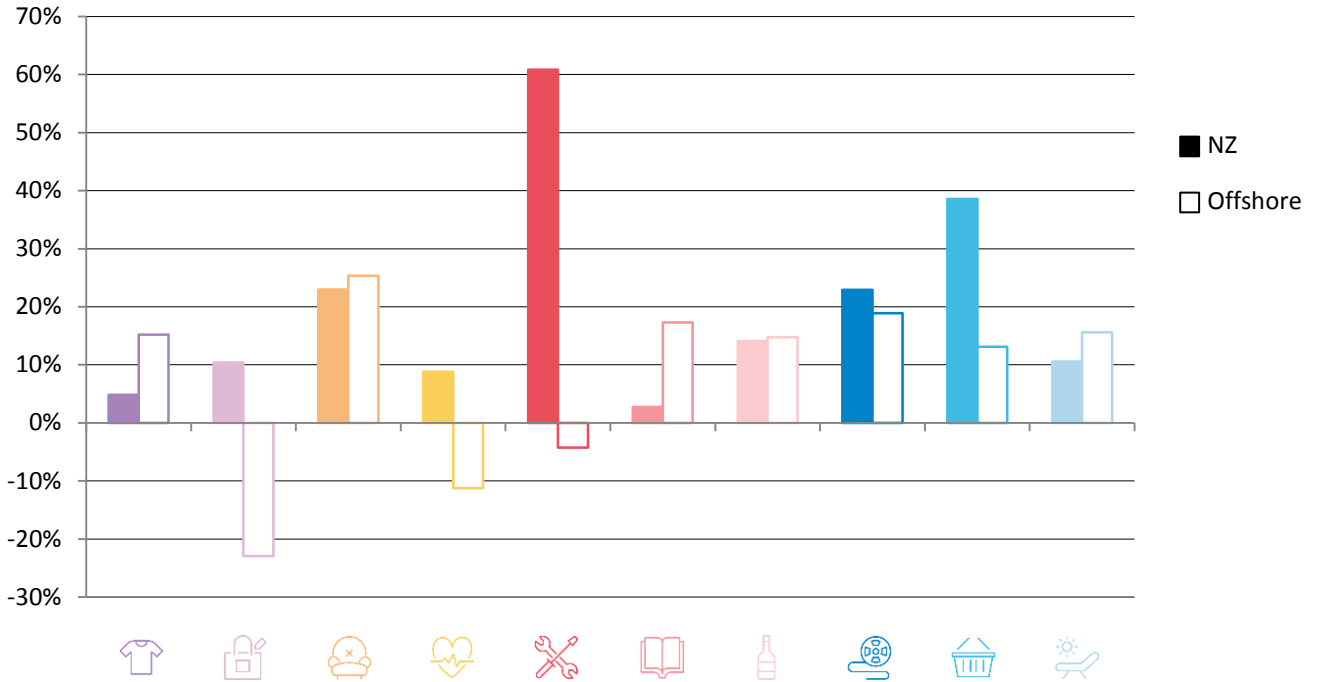
January 2018

Retailer Category	Month Total \$M		% Change vs Prior Month		% Change vs Last Year	
	NZ	Offshore	NZ	Offshore	NZ	Offshore
 Clothing & Footwear	7.0	17.3	-26.1%	-22.6%	4.9%	15.2%
 Department Stores	7.3	1.8	-46.0%	-20.0%	10.4%	-22.9%
 Furniture, Appliances & Electronics	7.5	18.3	-35.1%	-15.3%	23.0%	25.4%
 Health Goods & Services	3.0	3.2	-29.4%	-24.2%	8.8%	-11.2%
 Home & Building Supplies	3.4	0.5	-3.6%	-24.5%	60.8%	-4.3%
 Books & Stationery Stores	4.3	3.7	-19.2%	-29.6%	2.8%	17.3%
 Liquor Stores	1.6	0.5	-28.7%	-63.7%	14.1%	14.8%
 Recreation & Entertainment	35.7	39.1	0.4%	-6.9%	22.9%	18.9%
 Supermarkets & Food Retailers	25.6	4.3	-11.2%	-9.0%	38.6%	13.1%
 Travel & Accommodation	137.9	71.2	62.9%	23.7%	10.6%	15.6%
 <b>Total Retail Spend</b>	<b>233.3</b>	<b>160.0</b>	<b>17.3%</b>	<b>-1.4%</b>	<b>15.5%</b>	<b>15.9%</b>

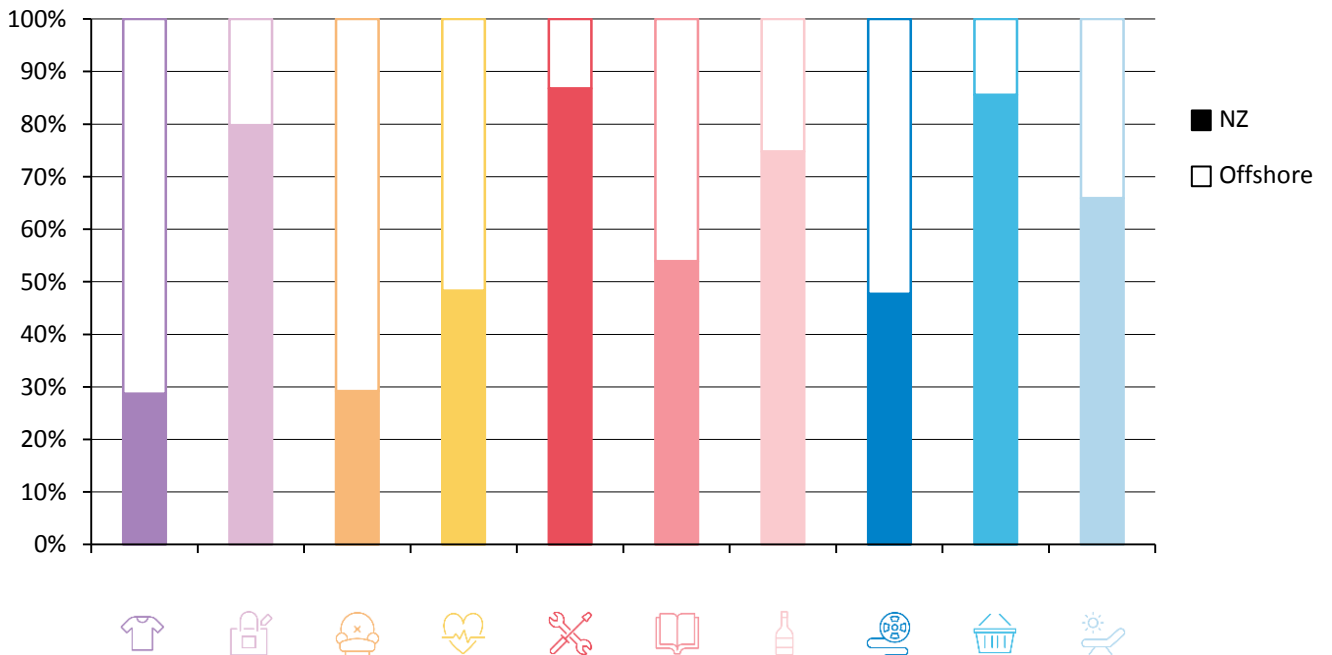
## Online retailer total revenue by category (\$M)



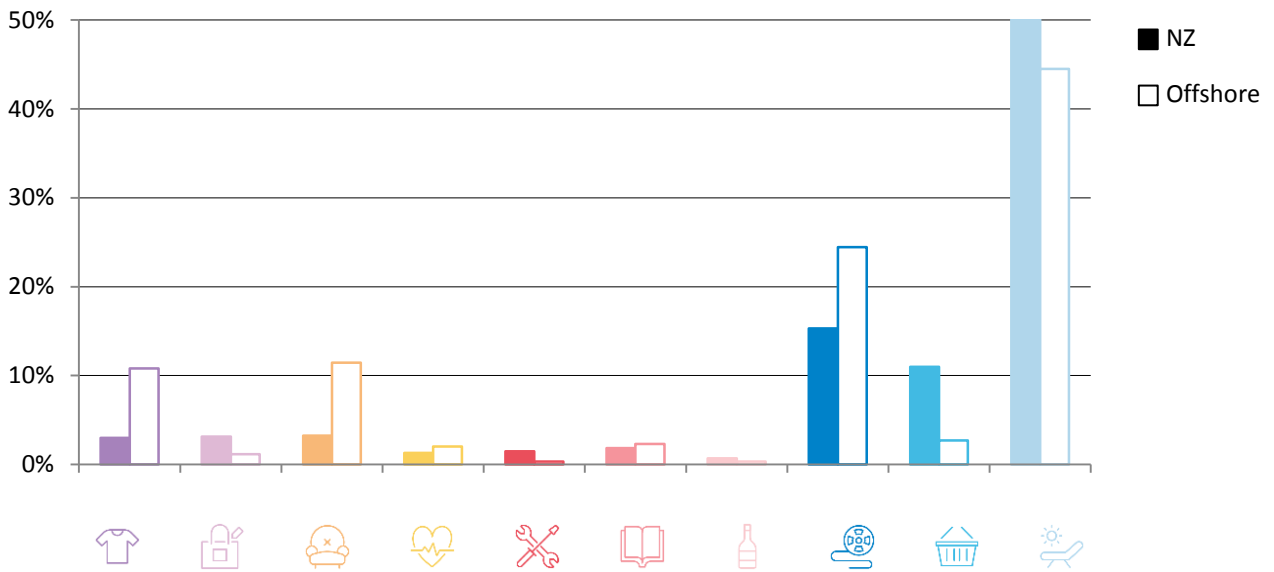
## Monthly online revenue change year-on-year



## 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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