



RETAIL WATCH

VALUE OF ELECTRONIC CARD TRANSACTIONS WITHIN RETAIL CATEGORIES PERIOD ENDING 28 / 07 / 2016

SOME BACKGROUND ON THIS REPORT














Total retail spend in New Zealand for the 28 days ending 28 July 2016 was \$3.4 billion. This represents a decrease of 0.7% compared to the previous month and an increase of 4.3% compared to the same period last year.

Categories which saw an increase in spend compared to the previous month were Recreation & Entertainment (+13.4%), Books & Stationery Stores (+8.5%), Café/Restaurants/Bars (+3.3%) and Travel & Accommodation (+0.6%).

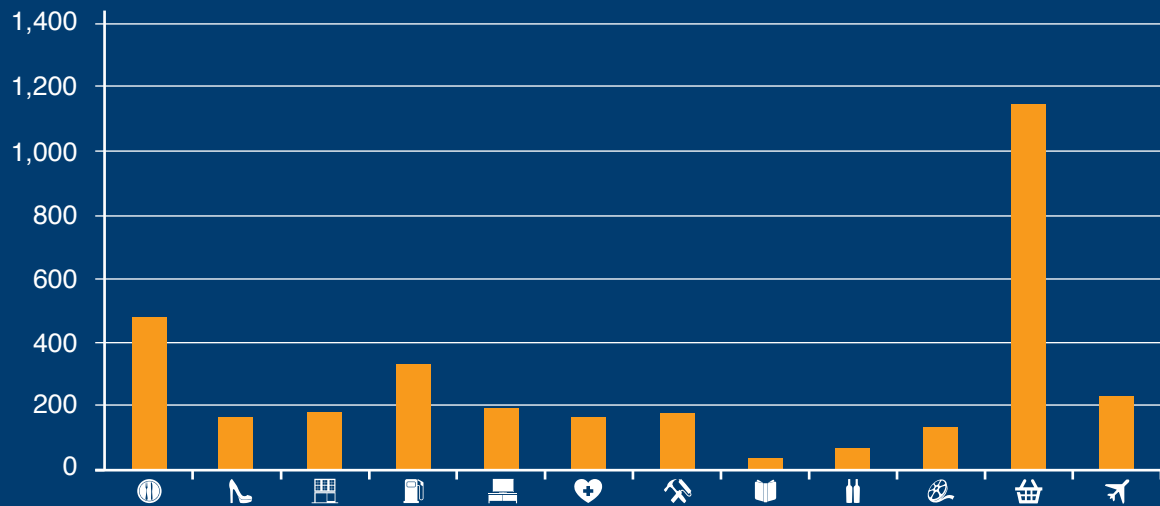
The greatest decreases in spend compared to the previous month were in Clothing & Footwear (-9.9%), Department Stores (-5.3%) and Furniture/Appliances/Electronics (-5.1%).

Most categories saw an increase in spend when compared to the same period last year. The greatest increases were in Recreation & Entertainment (+13.3%), Home & Building Supplies (+11.9%) and Café/Restaurants/Bars (+10.1%). Fuel/Service Stations (-7.6%) and Books & Stationery Stores (-3.7%) were the only categories to see a year on year decrease in spend this month.

MONTHLY SUMMARY JULY 2016

Retailer Category	Month Total \$M	% Change vs Prior Month	% Change vs Last Year	% Share
 Café/Restaurants/Bars	499	3.3%	10.1%	14.6%
 Clothing & Footwear	180	-9.9%	4.2%	5.3%
 Department Stores	189	-5.3%	5.6%	5.5%
 Fuel/Service Stations	332	-2.9%	-7.6%	9.7%
 Furniture/Appliances/Electronics	198	-5.1%	2.6%	5.8%
 Health Goods & Services	177	-1.3%	2.6%	5.2%
 Home & Building Supplies	184	-0.2%	11.9%	5.4%
 Books & Stationery Stores	48	8.5%	-3.7%	1.4%
 Liquor Stores	78	-1.6%	6.8%	2.3%
 Recreation & Entertainment	146	13.4%	13.3%	4.3%
 Supermarkets/Food Retailers	1,157	-0.8%	4.5%	34.0%
 Travel & Accommodation	220	0.6%	3.1%	6.5%
 TOTAL RETAIL SPEND	3,408	-0.7%	4.3%	100%

MONTHLY RETAIL SPEND BY CATEGORY



CHANGE VS LAST YEAR



QUARTERLY SUMMARY JULY 2016














The total quarterly retail spend for the 91 days ending 28 July 2016 was \$11.1 billion. This is a decrease of 1.1% compared to the previous quarter and an increase of 3.8% when compared to the same period last year.

Clothing & Footwear (+6.5%), Department Stores (+5.2%) and Health Goods & Services (+4.7%) saw the greatest increases in spend when compared to the previous quarter. As was seen last month, Travel & Accommodation (-9.4%) and Liquor Stores (-6.3%) were the categories that saw the greatest decrease in spend when compared to the previous quarter.

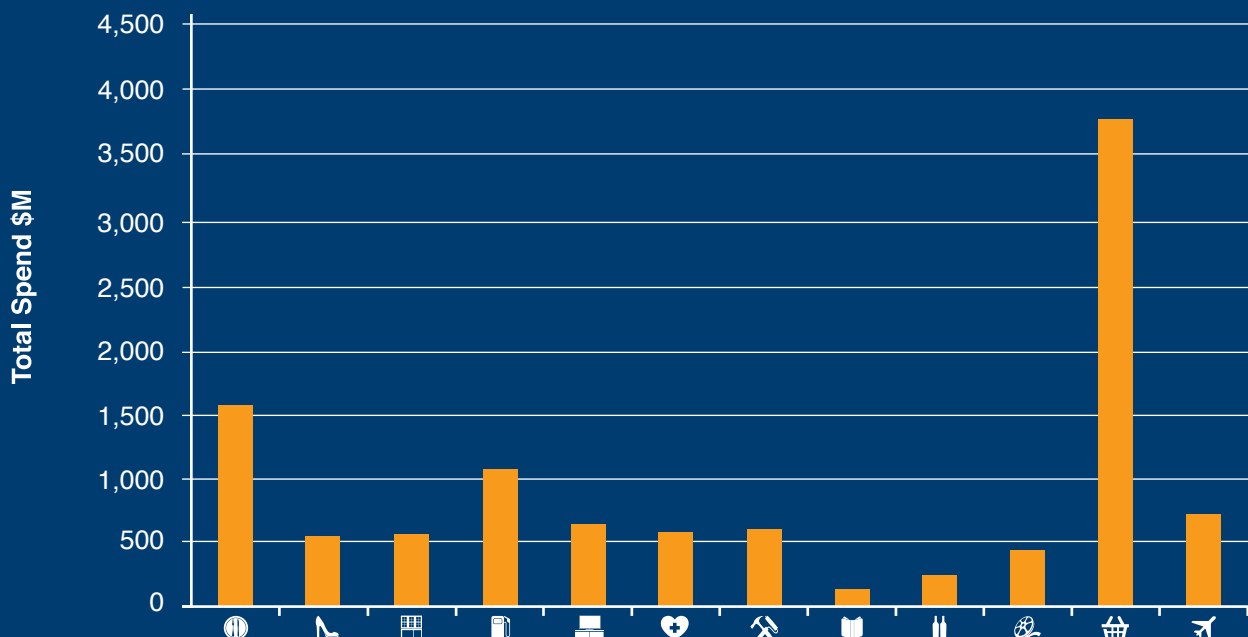
Increases in spend when compared to the same quarter last year were again led by Home & Building Supplies, up 9.9%. This increase was followed by Café/Restaurants/Bars (+9.2%), Liquor Stores (+7.9%) and Recreation & Entertainment (+6.5%). Department Stores reversed the year on year decrease in quarterly spend seen last month with a 3.3% increase in spend when compared to the same quarter last year. The only categories to see a year on year decrease in quarterly spend were Fuel/Service Stations (-6.1%) and Books & Stationery Stores (-2.4%).

QUARTERLY SUMMARY

JULY 2016

Retailer Category	Quarter Total \$M	% Change vs Prior QTR	% Change vs QTR Last Year	% Share
 Café/Restaurants/Bars	1,583	0.4%	9.2%	14.2%
 Clothing & Footwear	623	6.5%	5.3%	5.6%
 Department Stores	632	5.2%	3.3%	5.7%
 Fuel/Service Stations	1,092	-1.4%	-6.1%	9.8%
 Furniture/Appliances/Electronics	652	3.4%	2.6%	5.8%
 Health Goods & Services	589	4.7%	2.9%	5.3%
 Home & Building Supplies	618	-3.2%	9.9%	5.5%
 Books & Stationery Stores	149	0.1%	-2.4%	1.3%
 Liquor Stores	257	-6.3%	7.9%	2.3%
 Recreation & Entertainment	437	-1.1%	6.5%	3.9%
 Supermarkets/Food Retailers	3,785	-3.0%	4.2%	33.9%
 Travel & Accommodation	732	-9.4%	1.0%	6.6%
 TOTAL RETAIL SPEND	11,149	-1.1%	3.8%	100%

QUARTERLY RETAIL SPEND BY CATEGORY



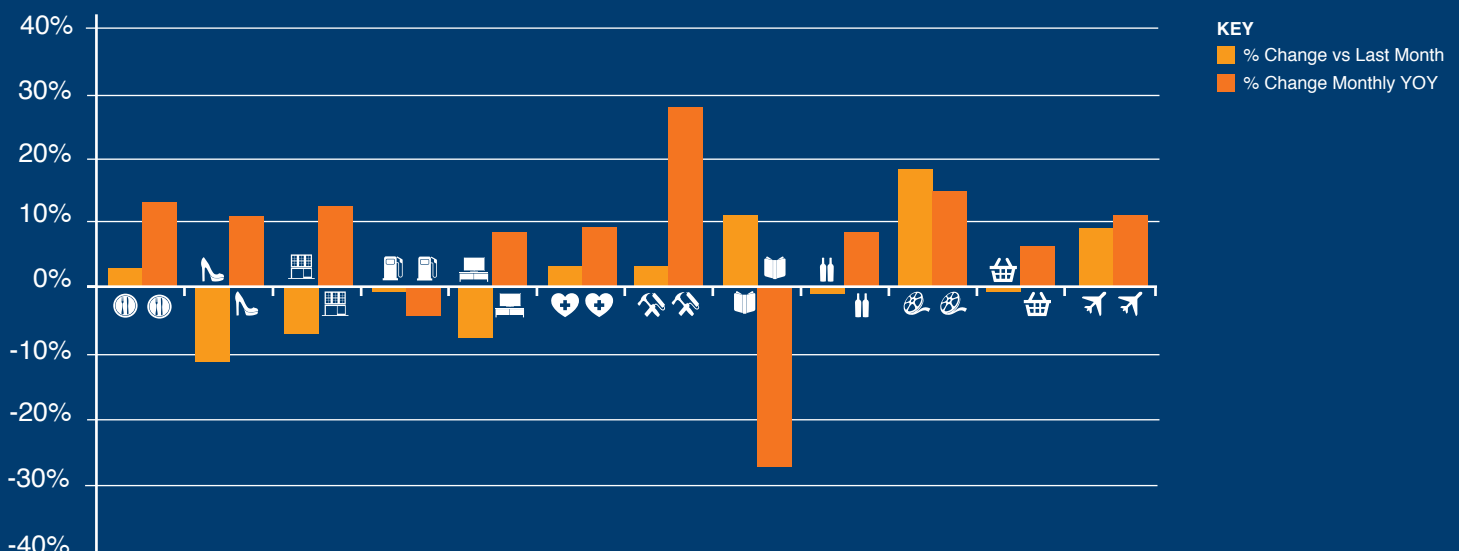
CHANGE VS LAST YEAR



SELECTED REGIONS OF INTEREST

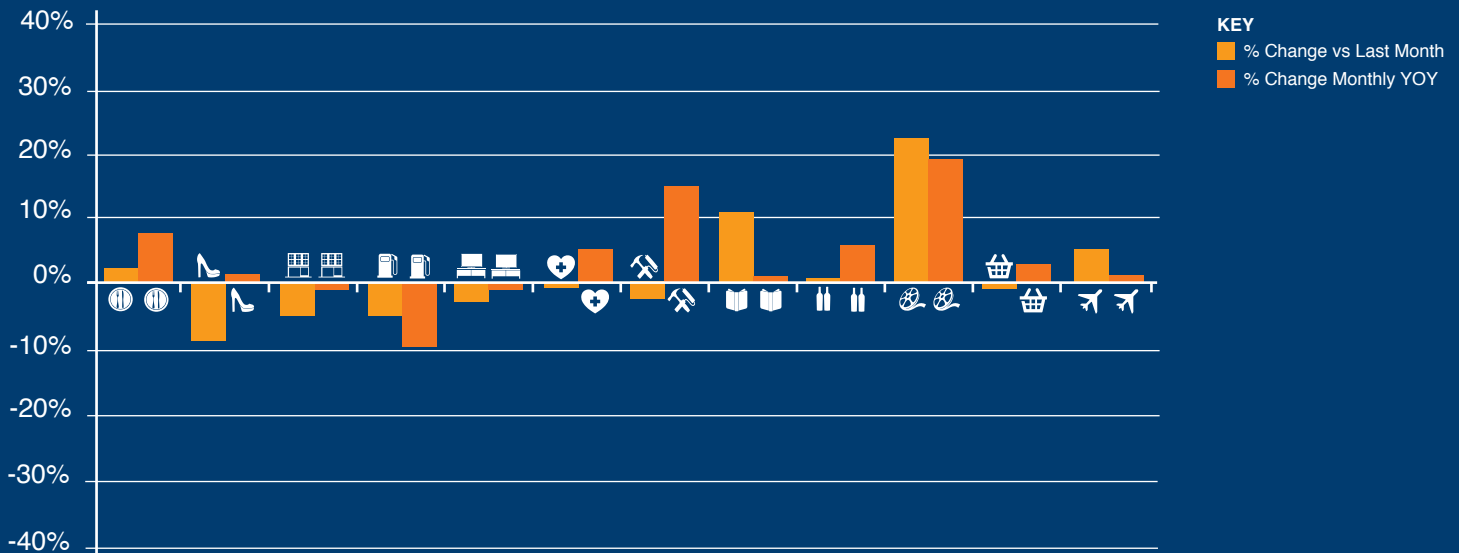
MONTHLY TRENDS - BAY OF PLENTY

The Bay of Plenty region saw a significant month on month increase in Recreation & Entertainment spend, up 18.4%. This increase was followed by increases in Books & Stationery Stores (+11.0%) and Travel & Accommodation (+8.8%) that were also greater than the national increase for these categories. The greatest decreases in spend when compared to the previous month were in Clothing & Footwear (-10.7%), Furniture/Appliances/Homewares (-7.9%) and Department Stores (-7.3%). Bay of Plenty also saw some significant increases in year on year spend with Home & Building Supplies up 28.4% and Recreation & Entertainment up 14.8%. As was seen at a national level, the only categories with a decrease in year on year spend were Books & Stationery Stores (-27.5%) and Fuel/Service Stations (-4.4%).



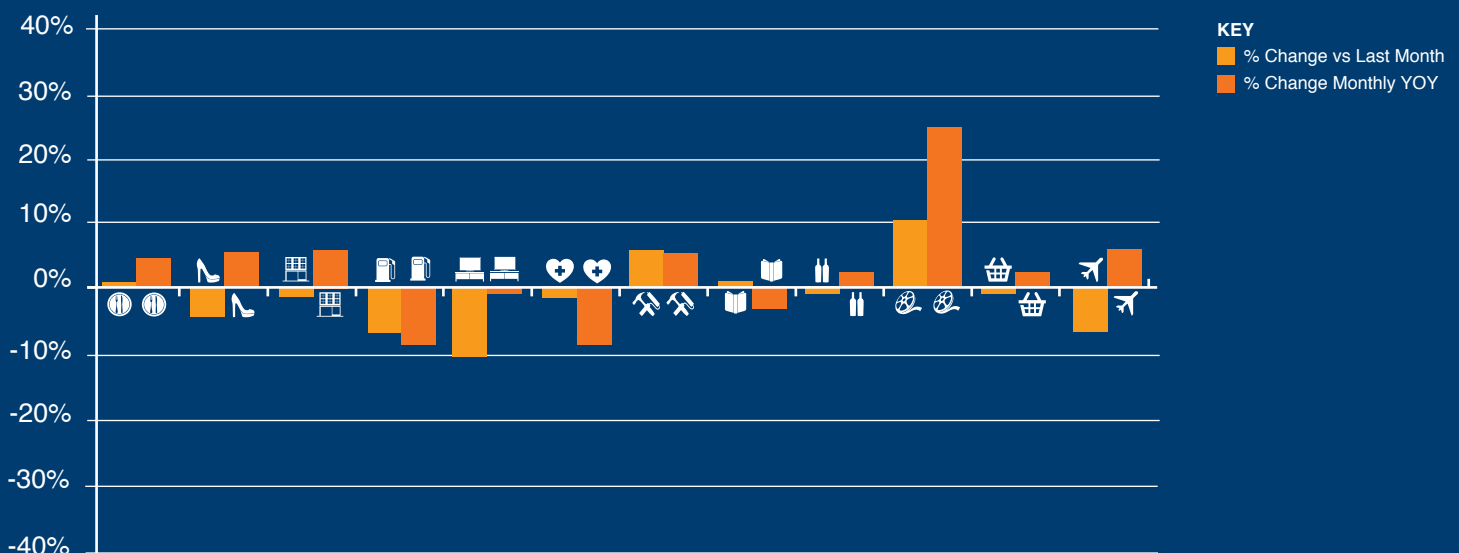
MONTHLY TRENDS - WELLINGTON

Wellington saw the greatest increases in month on month spend in the Recreation & Entertainment (+23.1%), Books & Stationery Stores (+11.3%) and Travel & Accommodation (+5.4%) categories, following national trends. The greatest decreases in spend compared to the previous month were in Clothing & Footwear (-8.3%), Fuel/Service Stations (-4.7%) and Department Stores (-4.4%). The Wellington region saw increases in year on year spend in most categories. The greatest increases in spend when compared to the previous year were in Recreation & Entertainment (+19.9%) and Home & Building Supplies (+15.3%). These increases were greater than the national increase for these categories. Fuel/Service Stations (-9.6%) saw the greatest decrease in spend when compared to the same period last year.



MONTHLY TRENDS - SOUTHLAND

Southland saw increases in month on month spend in four categories. The greatest increases were in Recreation & Entertainment (+10.2%) and Home & Building Supplies (+7.4%). Decreases in spend when compared to the previous month were led by Furniture/Appliances/Homewares (-11.3%), Fuel/Service Stations (-7.1%) and Travel & Accommodation (-6.9%). The Southland region saw some significant increases in spend when compared to the same period last year with Recreation & Entertainment up 24.0% and Liquor Stores up 12.7%. The only categories to see a decrease in year on year spend were Fuel/Service Stations (-8.8%), Health Goods & Services (-8.6%) and Books & Stationery Stores (-3.9%).



Recreation & Entertainment saw the greatest increase in month on month spend (+13.4%)

Home & Building Supplies saw the greatest increase in quarterly spend compared to the previous year (+9.9%)

Northland & Bay of Plenty had the greatest increase in overall spend compared to the previous year (+7.8%)

CATEGORIES UP THIS MONTH 4

REGIONS UP THIS MONTH 5

Clothing & Footwear saw the greatest month on month decrease in spend (-9.9%)

Fuel/Service Stations saw the greatest decrease in spend when compared to the same period last year (-7.6%)

The Taranaki region saw the greatest decrease in overall spend compared to the same period last year (-0.6%)

CATEGORIES DOWN THIS MONTH 8

REGIONS DOWN THIS MONTH 11

RETAIL WATCH NOTES

1. Retailer categories are taken from the Merchant Category Codes allocated by MasterCard and VISA
2. \$ Values are represented in \$millions. New Zealand estimates are exclusive of GST. Overseas estimates may be subject to foreign taxes, which are not excluded
3. 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
4. Data for this report comes from Westpac Business Insight and is weighted to give national and regional totals