

Retail Watch

September 2016

Value of electronic card transactions within retail categories

Period ending 28 / 09 / 2016














Total retail spend in New Zealand for the 28 days ending 28 September 2016 was \$3.5 billion. This is an increase of 4.2% compared to the previous month and an increase of 3.9% compared to the same period last year.

The greatest increases in month on month spend were in Travel & Accommodation (+18.4%), Home & Building Supplies (+14.9%) and Recreation & Entertainment (+12.1%). These categories also have the greatest increases in spend when compared to the same period last year with Travel & Accommodation up 15.5%, Recreation & Entertainment up 11.8% and Home & Building Supplies up 8.8%.

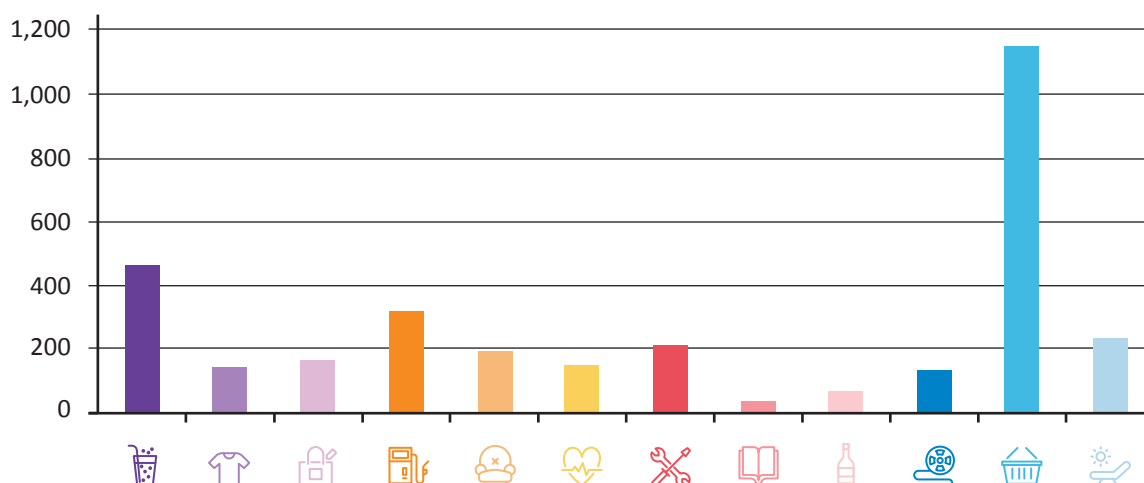
Decreases in year on year spend were seen in the Books & Stationery Stores (-7.0%), Fuel & Service Stations (-6.0%) and Department Stores (-0.3%) categories. There were no decreases in spend when compared to the previous month.

Monthly summary

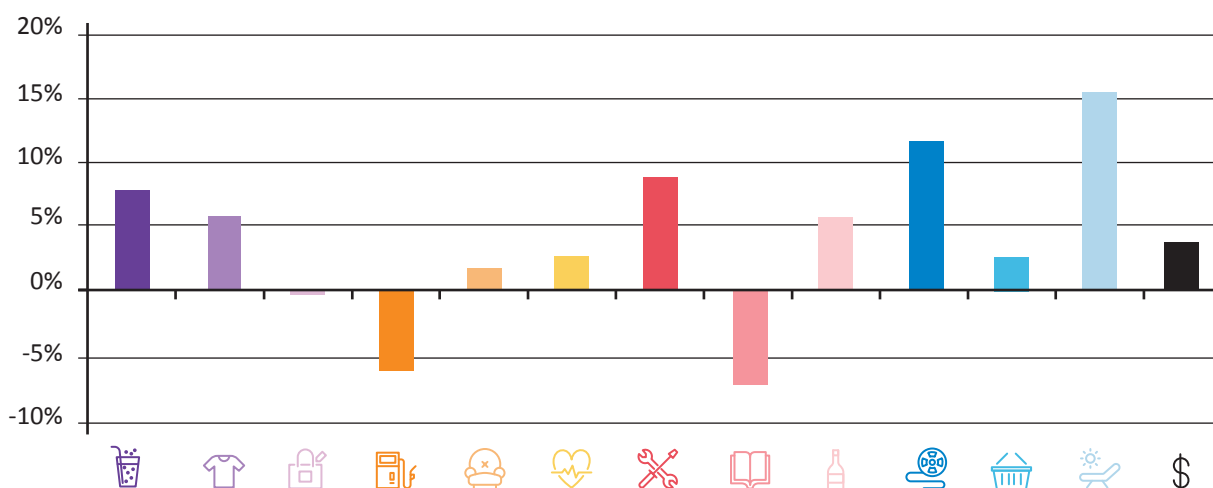
September 2016

Retailer Category	Month Total \$M	% Change vs Prior Month	% Change vs Last Year	% Share
 Cafés, Restaurants & Bars	493	2.0%	7.9%	14.3%
 Clothing & Footwear	173	6.2%	5.9%	5.0%
 Department Stores	182	7.5%	-0.3%	5.3%
 Fuel & Service Stations	330	0.7%	-6.0%	9.6%
 Furniture, Appliances & Electronics	198	5.1%	1.7%	5.7%
 Health Goods & Services	179	1.0%	2.8%	5.2%
 Home & Building Supplies	209	14.9%	8.8%	6.0%
 Books & Stationery Stores	43	0.6%	-7.0%	1.2%
 Liquor Stores	80	3.4%	5.8%	2.3%
 Recreation & Entertainment	140	12.1%	11.8%	4.1%
 Supermarkets & Food Retailers	1,178	0.9%	2.7%	34.1%
 Travel & Accommodation	249	18.4%	15.5%	7.2%
 TOTAL RETAIL SPEND	3,456	4.2%	3.9%	100%

Monthly retail spend by category (\$M)



Change vs last year



Quarterly summary

September 2016














The total quarterly retail spend for the 91 days ending 28 September 2016 was \$11.1 billion. This is a decrease of 1.7% compared to the previous quarter and an increase of 3.4% when compared to the same period last year.

When compared to the previous quarter, spend increased in Recreation & Entertainment (+2.5%), Cafés, Restaurants & Bars (+0.8%) and Home & Building Supplies (+0.3%) categories only. The greatest decreases in spend were in Clothing & Footwear (-13.5%) and Department Stores (-7.8%) when compared to the previous quarter.

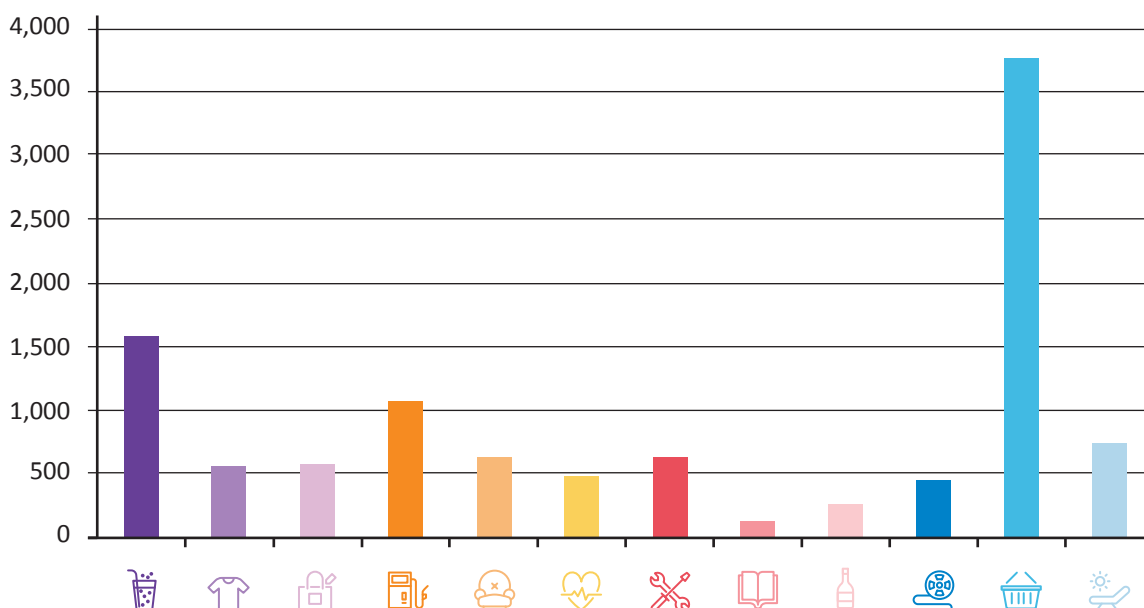
Increases in spend when compared to the same quarter last year were led by Recreation & Entertainment (+10.3%), Home & Building Supplies (+8.7%) and Cafés, Restaurants & Bars (+8.5%). Fuel & Service Stations (-7.1%) and Books & Stationery Stores (-4.2%) were the only categories where spend decreased when compared to the same quarter last year.

Quarterly summary

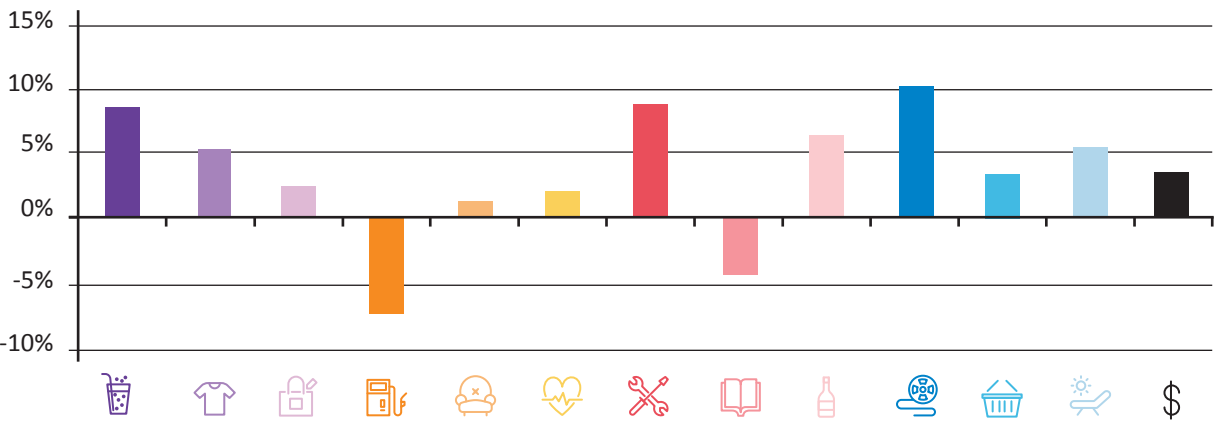
September 2016

Retailer Category	Month Total \$M	% Change vs Prior Month	% Change vs Last Year	% Share
 Cafés, Restaurants & Bars	1,599	0.8%	8.5%	14.4%
 Clothing & Footwear	561	-13.5%	5.2%	5.1%
 Department Stores	589	-7.8%	2.4%	5.3%
 Fuel & Service Stations	1,074	-2.2%	-7.1%	9.7%
 Furniture, Appliances & Electronics	639	-2.3%	1.2%	5.8%
 Health Goods & Services	580	-2.3%	2.0%	5.2%
 Home & Building Supplies	638	0.3%	8.7%	5.8%
 Books & Stationery Stores	145	-0.2%	-4.2%	1.3%
 Liquor Stores	257	-1.9%	6.4%	2.3%
 Recreation & Entertainment	445	2.5%	10.3%	4.0%
 Supermarkets & Food Retailers	3,798	-0.4%	3.3%	34.4%
 Travel & Accommodation	741	-0.7%	5.5%	6.7%
 TOTAL RETAIL SPEND	11,064	-1.7%	3.4%	100%

Quarterly retail spend by category (\$M)



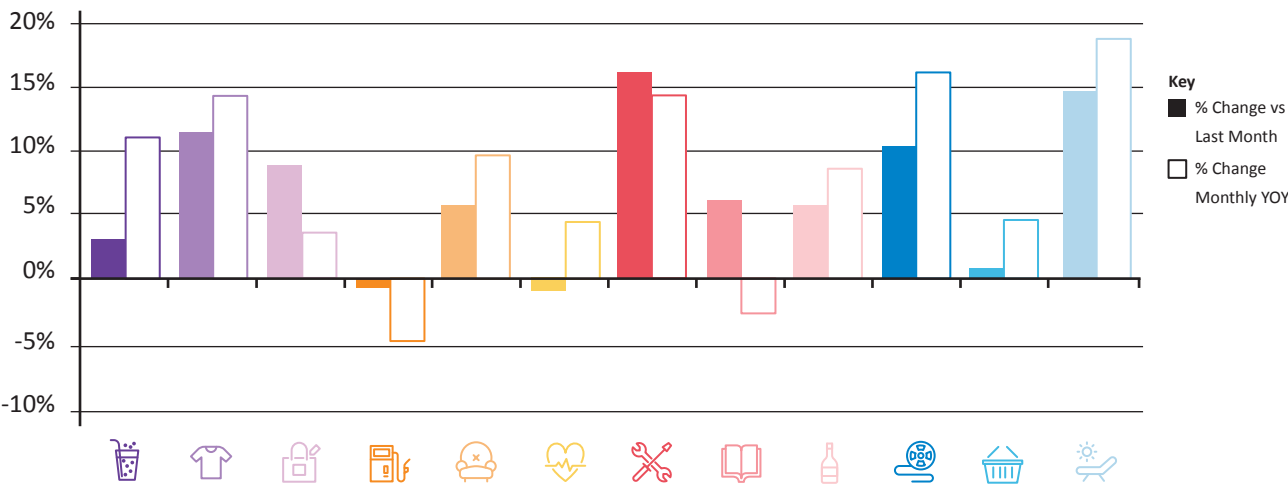
Change vs last year



Selected regions of interest

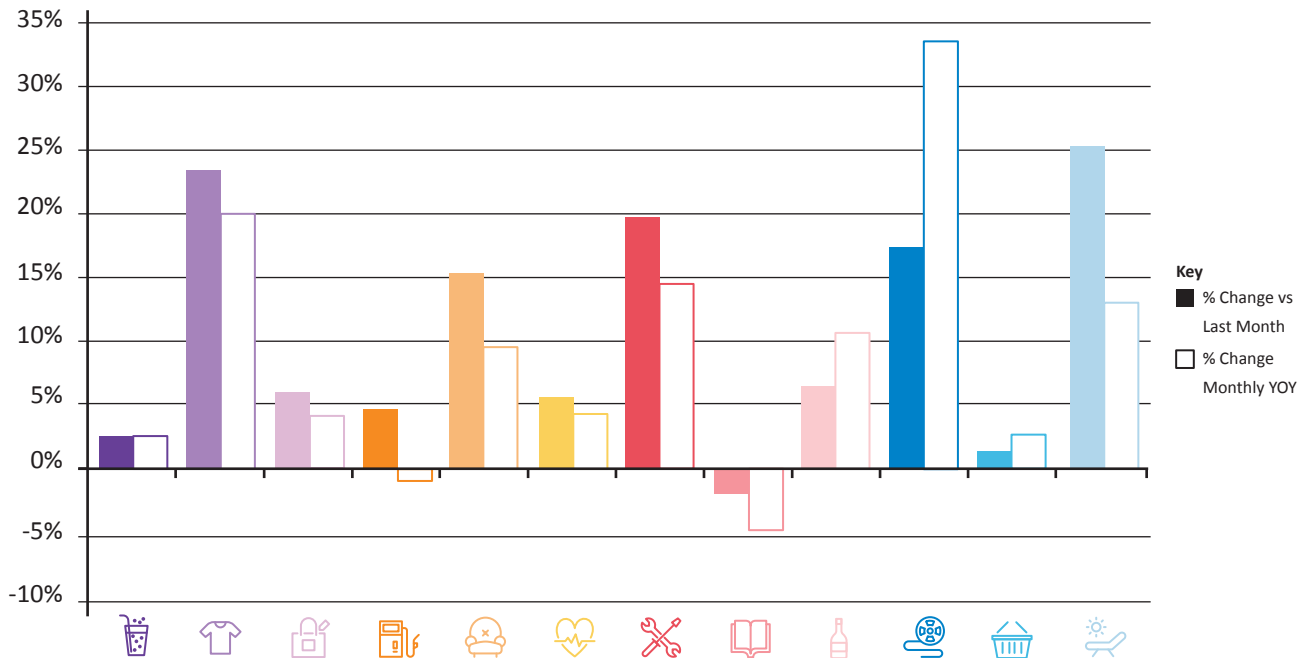
Monthly trends - Waikato

In the Waikato region there were significant increases in month on month spend in the Home & Building Supplies (+16.2%) and Travel & Accommodation (+14.8%) categories. The Travel & Accommodation category also led the increases in year on year spend, up 18.9%. Other significant increases in year on year spend were in Recreation & Entertainment (+16.8%), Home & Building Supplies (+14.3%) and Clothing & Footwear (+14.1%). Fuel & Service Stations spend decreased 0.6% when compared to the previous month and 4.6% when compared to the same period last year. Books & Stationery Stores spend also decreased year on year, down 2.2%.



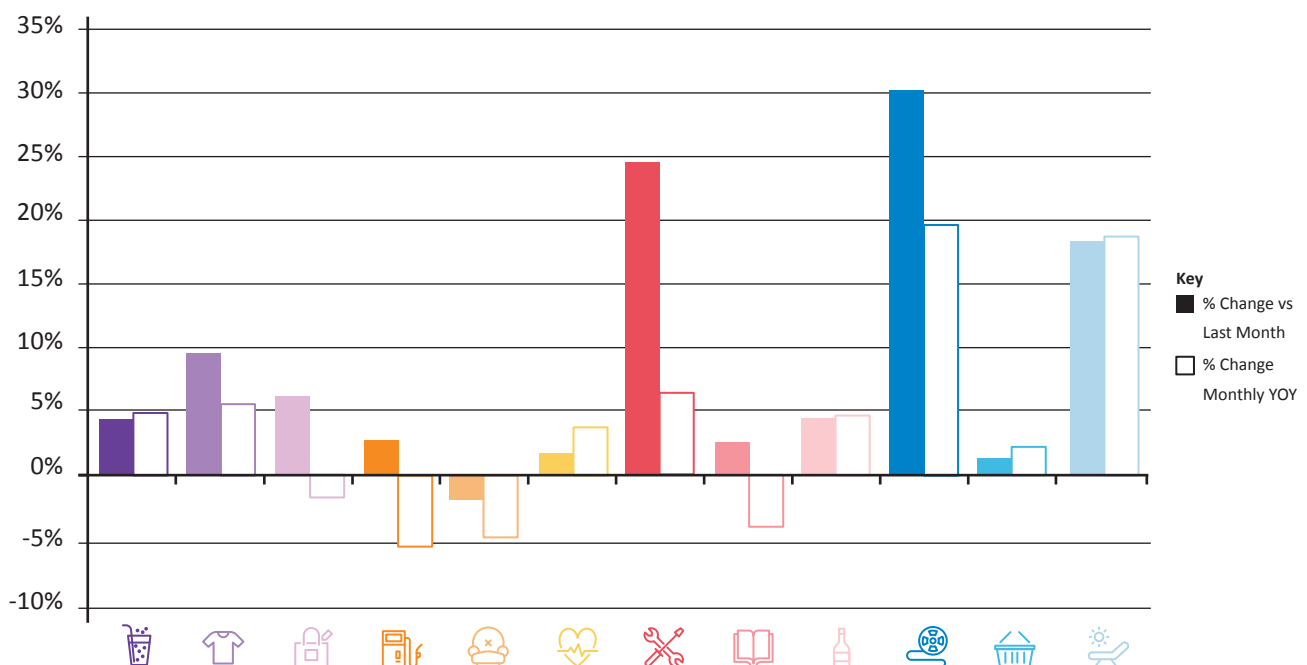
Monthly trends - Marlborough

Marlborough had a strong month with significant increases in spend when compared to the previous month and the same period last year. Increases in month on month spend were led by Travel & Accommodation (+25.2%), Clothing & Footwear (+23.5%), Home & Building Supplies (+19.9%) and Recreation & Entertainment (+17.3%) categories. These categories also had the greatest increases in year on year spend. Recreation & Entertainment was up 33.7%, Clothing & Footwear up 20.0%, Home & Building Supplies up 14.4% and Travel & Accommodation up 13.1%. Books & Stationery Stores spend decreased 2.8% compared to the previous month and 4.4% when compared to the same period last year. Fuel & Service Stations was the only other category where spend decreased year on year, down 0.8%.



Monthly trends - Canterbury

Canterbury had the greatest increases in month on month spend in the Recreation & Entertainment (+30.3%), Home & Building Supplies (+24.8%) and Travel & Accommodation (+18.1%) categories. The only category where spend decreased when compared to the previous month was Furniture, Appliances & Homewares, down 1.8%. Year on year, increases in spend were led by Recreation & Entertainment (+19.4%) and Travel & Accommodation (+18.8%). There were decreases in spend when compared to the same period last year in Fuel & Service Stations (-5.3%), Furniture, Appliances & Homewares (-4.4%), Books & Stationery Stores (-3.6%) and Department Stores (-1.5%).



↑ Going up this month

The greatest increase in year on year spend was in Travel & Accommodation (+15.5%)

Bay of Plenty saw the greatest increase in overall spend compared to the same period last year (+7.2%)

9
Categories up

15
Regions up

↓ Going down this month

The greatest decrease in year on year spend was in Books & Stationery Stores (-7.0%)

The Taranaki region was the only region where overall spend compared to the same period last year decreased (-1.8%)

3
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.



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☎ +64 9 303 2300

0800 DATAMINE 0800 328 264

✉ retailwatch@datamine.com

🌐 **www.datamine.com**

🏠 15 Faraday Street

Parnell

Auckland 1052

New Zealand