

Retail Watch

October 2016

Value of electronic card transactions within retail categories














Period ending 28 / 10 / 2016

Total retail spend in New Zealand for the 28 days ending 28 October 2016 was \$3.5 billion. This is an increase of 3.3% compared to the previous month and an increase of 2.0% compared to the same period last year. The greatest increases in month on month spend were in Home & Building Supplies (+12.4%), Recreation & Entertainment (+10.4%) and Clothing & Footwear (+8.9%).

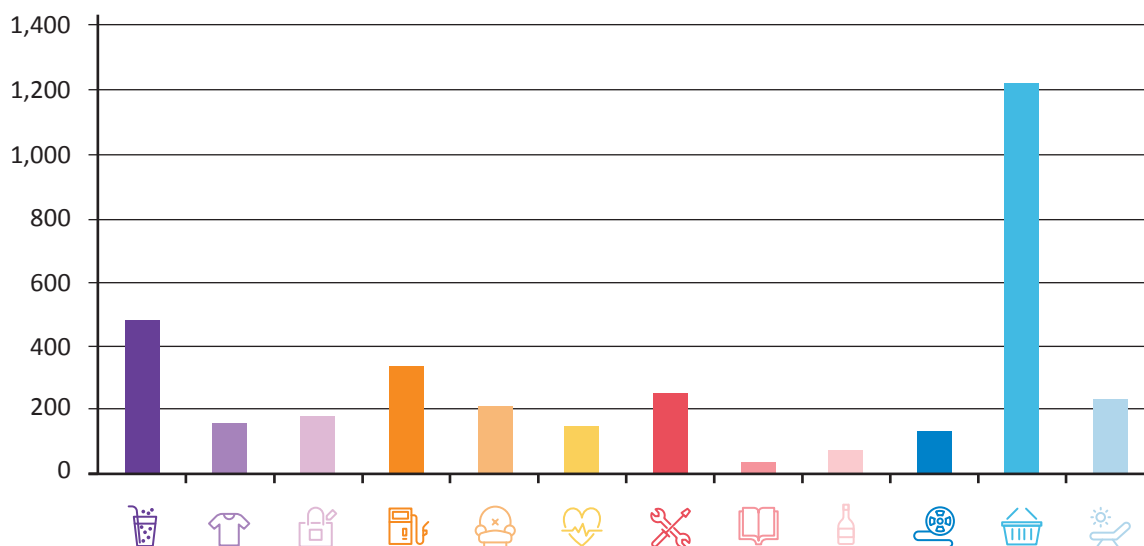
The Recreation & Entertainment category also had the greatest increase in year on year spend, up 16.4%. Travel & Accommodation had the greatest decrease in spend when compared to the previous month, down 10.5%, while year on year spend for this category increased by 3.2%. Other categories with an increase in spend when compared to the same period last year include Cafés, Restaurants & Bars (+5.8%), Liquor Stores (+3.9%) and Home & Building Supplies (+2.7%). Decreases in year on year spend were seen in the Books & Stationery Stores (-5.1%), Fuel & Service Stations (-3.9%), Department Stores (-2.7%) and Furniture, Appliances & Electronics (-0.7%) categories.

Monthly summary

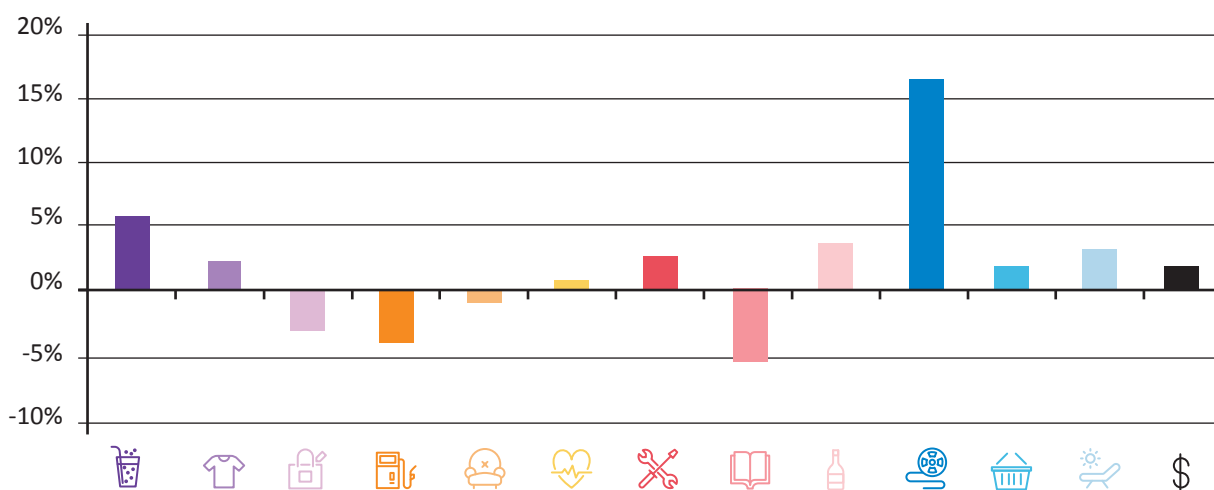
October 2016

Retailer Category	Month Total \$M	% Change vs Prior Month	% Change vs Last Year	% Share
 Cafés, Restaurants & Bars	498	1.1%	5.8%	14.1%
 Clothing & Footwear	187	8.9%	2.2%	5.3%
 Department Stores	190	5.0%	-2.7%	5.3%
 Fuel & Service Stations	344	4.7%	-3.9%	9.7%
 Furniture, Appliances & Electronics	209	7.1%	-0.7%	5.9%
 Health Goods & Services	173	-2.5%	0.7%	4.9%
 Home & Building Supplies	232	12.4%	2.7%	6.5%
 Books & Stationery Stores	42	-0.4%	-5.1%	1.2%
 Liquor Stores	84	5.9%	3.9%	2.4%
 Recreation & Entertainment	153	10.4%	16.4%	4.3%
 Supermarkets & Food Retailers	1,211	3.4%	1.9%	34.2%
 Travel & Accommodation	219	-10.5%	3.2%	6.2%
 TOTAL RETAIL SPEND	3,543	3.3%	2.0%	100%

Monthly retail spend by category (\$M)



Change vs last year



Quarterly summary

October 2016














The total quarterly retail spend for the 91 days ending 28 October 2016 was \$11.2 billion. There is no change in spend when compared to the previous quarter and an increase in spend of 2.3% when compared to the same period last year.

When compared to the previous quarter, spend increased the most in the Home & Building Supplies (+10.1%) and Recreation & Entertainment (+4.0%) categories. The greatest decreases in spend when compared to the previous quarter were in Clothing & Footwear (-9.4%) and Department Stores (-7.1%).

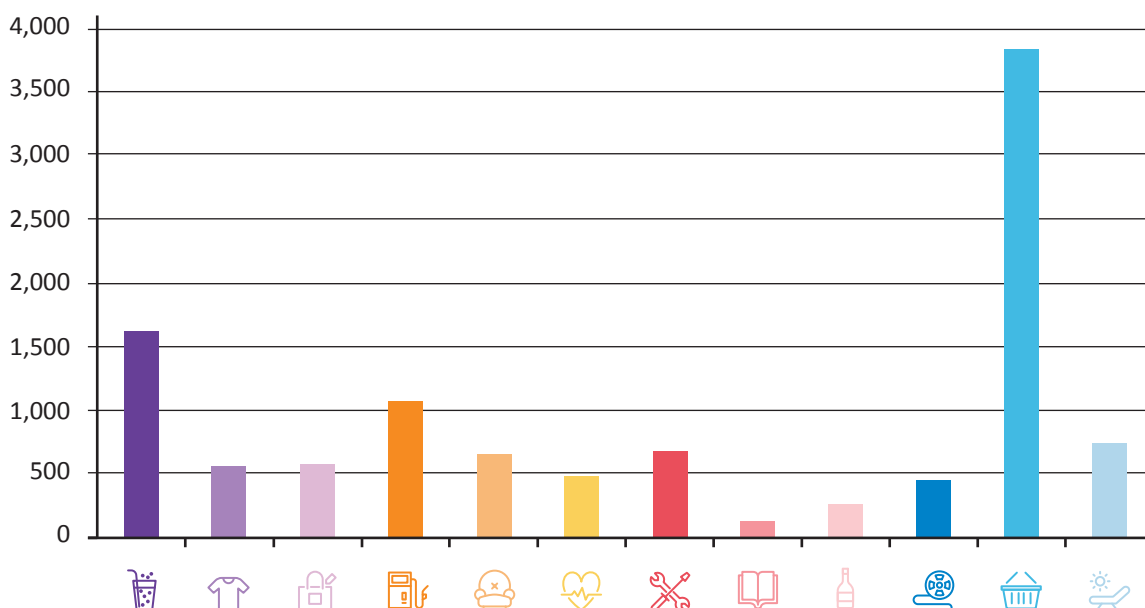
Increases in spend when compared to the same quarter last year were led by Recreation & Entertainment (+10.8%), Cafés, Restaurants & Bars (+7.0%) and Travel & Accommodation (+5.4%). Fuel & Service Stations (-6.1%), Books & Stationery Stores (-5.5%) and Department Stores (-0.7%) were the only categories where spend decreased when compared to the same quarter last year.

Quarterly summary

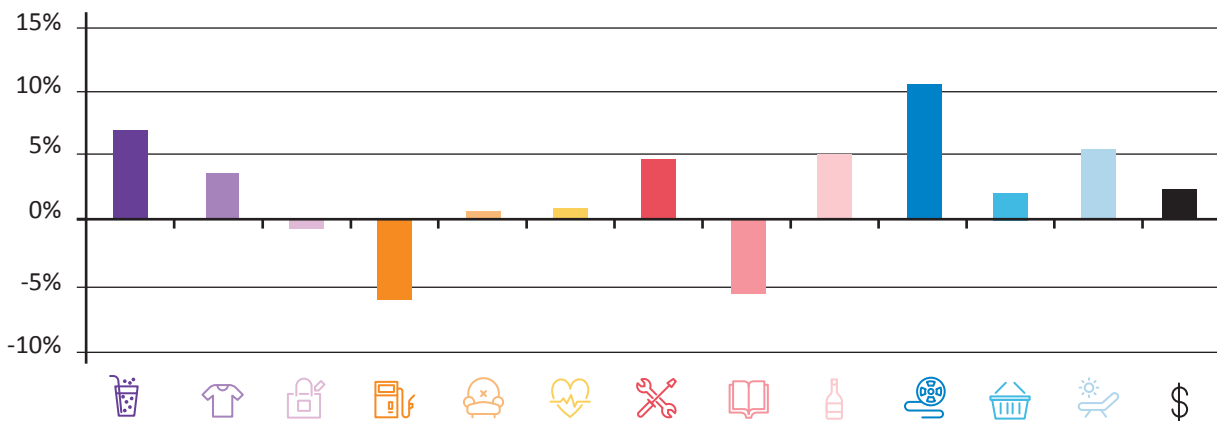
October 2016

Retailer Category	Month Total \$M	% Change vs Prior Month	% Change vs Last Year	% Share
 Cafés, Restaurants & Bars	1,601	0.5%	7.0%	14.3%
 Clothing & Footwear	566	-9.4%	3.6%	5.1%
 Department Stores	589	-7.1%	-0.7%	5.3%
 Fuel & Service Stations	1,084	-0.9%	-6.1%	9.7%
 Furniture, Appliances & Electronics	651	-0.3%	0.6%	5.8%
 Health Goods & Services	570	-3.4%	0.9%	5.1%
 Home & Building Supplies	683	10.1%	4.8%	6.1%
 Books & Stationery Stores	139	-6.7%	-5.5%	1.3%
 Liquor Stores	262	1.7%	5.0%	2.3%
 Recreation & Entertainment	452	4.0%	10.8%	4.0%
 Supermarkets & Food Retailers	3,840	1.4%	2.1%	34.4%
 Travel & Accommodation	737	0.4%	5.4%	6.6%
 TOTAL RETAIL SPEND	11,174	0.0%	2.3%	100%

Quarterly retail spend by category (\$M)



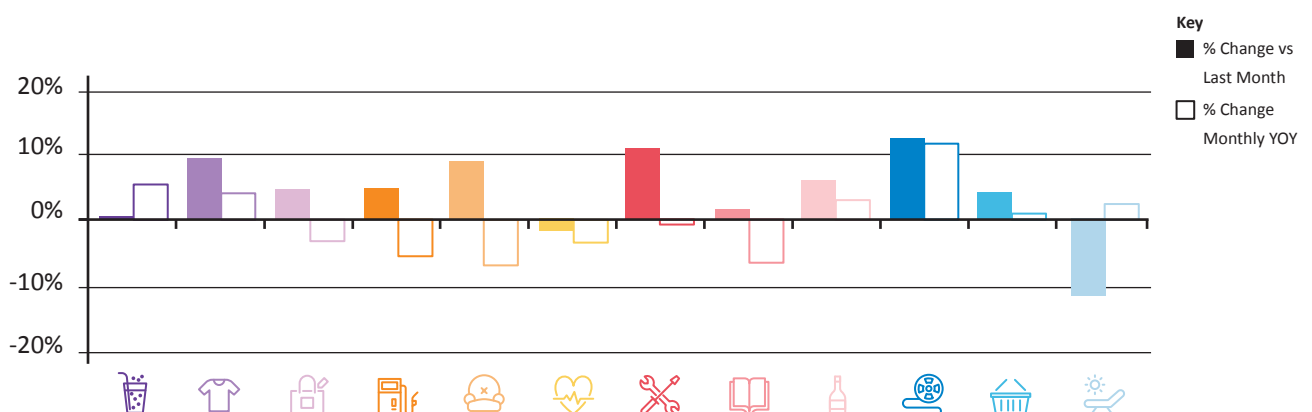
Change vs last year



Selected regions of interest

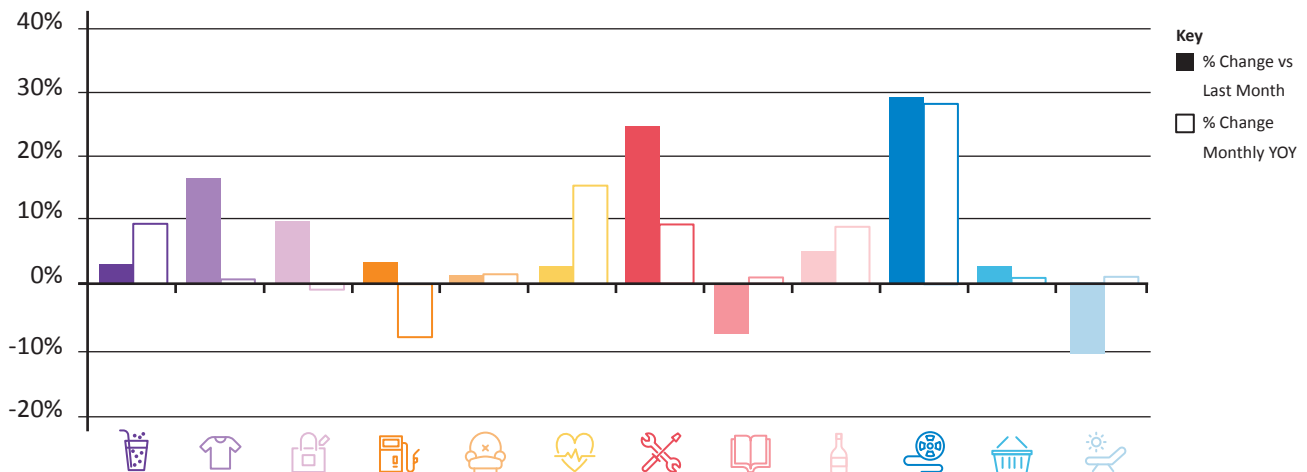
Monthly trends - Auckland

The greatest increases in month on month spend in Auckland were in the Recreation & Entertainment (+13.2%), Home & Building Supplies (+11.8%) and Clothing & Footwear (+9.6%) categories, following national trends. The only categories to see a decrease in spend when compared the previous month were Travel & Accommodation (-11.8%) and Health Goods & Services (-2.1%). Year on year, the greatest increases in spend were in Recreation & Entertainment (+12.0%), Cafes, Restaurants & Bars (+5.6%) and Clothing & Footwear (+4.1%). Several categories saw a decrease in spend when compared to the same period last year. The greatest decreases in spend were in Furniture, Appliances & Homewares (-7.2%) and Books & Stationery Stores (-6.4%).



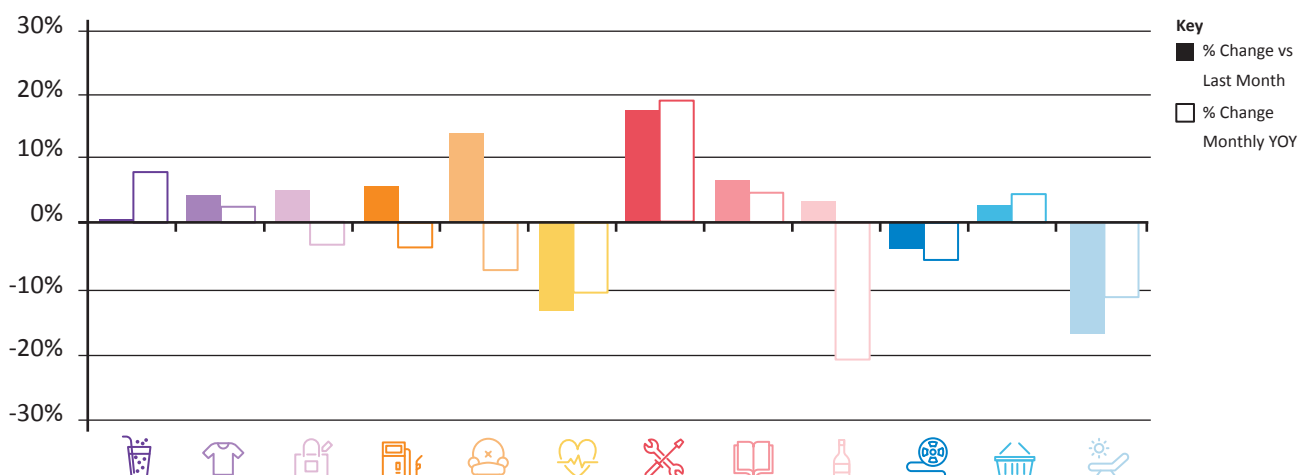
Monthly trends - Hawke's Bay

The Hawke's Bay region had significant increases in Recreation & Entertainment and Home & Building Supplies categories this month. Recreation & Entertainment spend increased 29.0% month on month and 28.0% when compared to the same period last year. Home & Building Supplies spend increased 24.4% month on month and 8.9% when compared to the same period last year. Other notable increases in year on year spend were in Health Goods & Services (+15.2%), Cafés, Restaurants & Bars (+9.3%) and Liquor Stores (+8.5%). The only categories to see a decrease in spend when compared to the same period last year were Fuel & Service Stations (-7.7%) and Department Stores (-0.6%).



Monthly trends - Nelson

Nelson's greatest increases in month on month and year on year spend were in the Home & Building Supplies category up 17.9% and 18.8%, respectively. Increases in spend when compared to the previous month were followed by Furniture, Appliances & Homewares (+14.1%), Books & Stationery Stores (+6.6%) and Fuel & Service Stations (+5.5%). Year on year, there were significant decreases in spend in Liquor Stores (-20.7%), Travel & Accommodation (-11.1%) and Health Goods & Services (-10.2%) spend.



↑ Going up this month

The greatest increase in year on year spend was in Recreation & Entertainment (+16.4%)

Waikato saw the greatest increase in overall spend compared to the same period last year (+4.8%)

8
Categories up

15
Regions up

↓ Going down this month

The greatest decrease in year on year spend was in Books & Stationery Stores (-5.1%)

The Taranaki region was the only region where overall spend compared to the same period last year decreased (-1.3%)

4
Categories down

1
Regions down

About Retail Watch

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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📞 +64 9 303 2300

0800 DATAMINE 0800 328 264

✉️ retailwatch@datamine.com

🌐 **www.datamine.com**

📍 15 Faraday Street

Parnell

Auckland 1052

New Zealand