



RETAIL WATCH

VALUE OF ELECTRONIC CARD TRANSACTIONS WITHIN RETAIL CATEGORIES PERIOD ENDING 28 / 08 / 2016














SOME BACKGROUND ON THIS REPORT

Total retail spend in New Zealand for the 28 days ending 28 August 2016 was \$3.4 billion. This represents a decrease of 2.1% compared to the previous month and an increase of 3.1% compared to the same period last year.

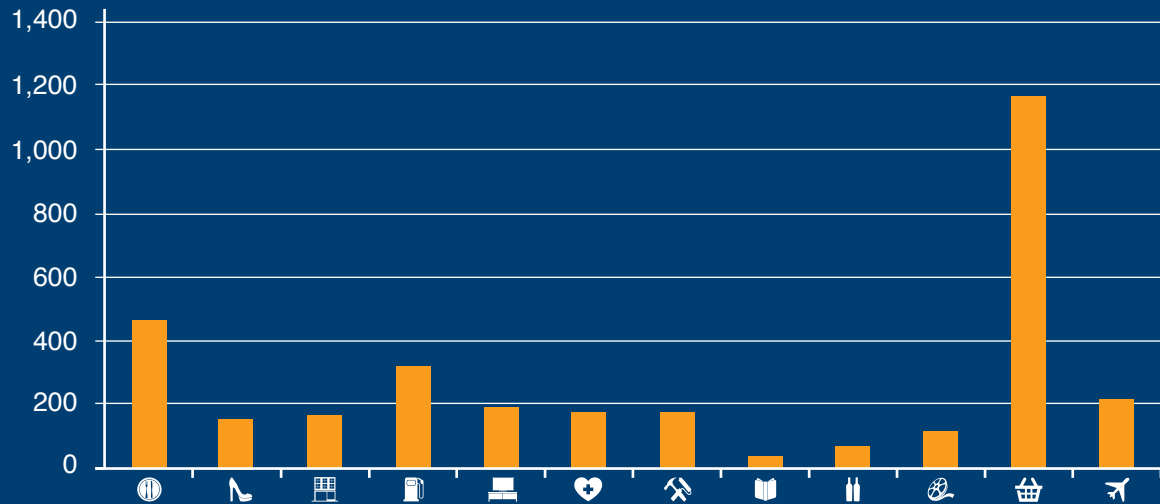
The only categories which saw an increase in spend compared to the previous month were Supermarkets/Food Retailers (+1.4%) and Health Goods & Services (+0.9%). The greatest decreases in spend compared to the previous month were in Recreation & Entertainment (-13.0%), Department Stores (-9.7%) and Books & Stationery Stores (-9.6%).

The greatest increases in spend when compared to the same period last year were in Café/Restaurants/Bars (+8.7%), Home & Building Supplies (+8.7%) and Recreation & Entertainment (+7.5%). Fuel/Service Stations (-7.0%) was the only category to see a year on year decrease in spend this month.

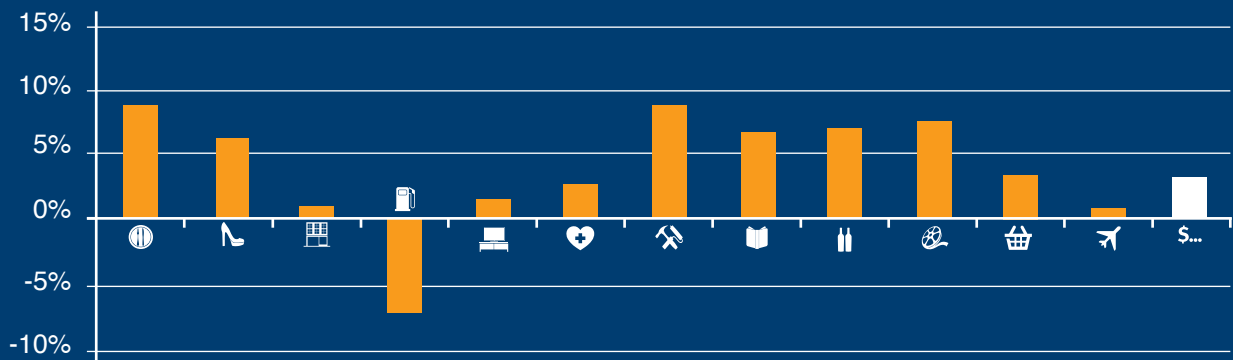
MONTHLY SUMMARY AUGUST 2016

Retailer Category	Month Total \$M	% Change vs Prior Month	% Change vs Last Year	% Share
 Café/Restaurants/Bars	488	-2.7%	8.7%	14.6%
 Clothing & Footwear	165	-8.6%	6.2%	4.9%
 Department Stores	171	-9.7%	0.7%	5.1%
 Fuel/Service Stations	331	-0.6%	-7.0%	9.9%
 Furniture/Appliances/Electronics	192	-3.8%	1.3%	5.7%
 Health Goods & Services	180	0.9%	2.5%	5.4%
 Home & Building Supplies	185	-0.4%	8.7%	5.5%
 Books & Stationery Stores	43	-9.6%	6.4%	1.3%
 Liquor Stores	78	-0.5%	6.9%	2.3%
 Recreation & Entertainment	127	-13.0%	7.5%	3.8%
 Supermarkets/Food Retailers	1,177	1.4%	3.2%	35.1%
 Travel & Accommodation	215	-3.3%	0.6%	6.4%
 TOTAL RETAIL SPEND	3,353	-2.1%	3.1%	100%

MONTHLY RETAIL SPEND BY CATEGORY



CHANGE VS LAST YEAR



QUARTERLY SUMMARY AUGUST 2016














The total quarterly retail spend for the 91 days ending 28 August 2016 was \$11.1 billion. This is a decrease of 1.6% compared to the previous quarter and an increase of 3.8% when compared to the same period last year.

Furniture/Appliances/Electronics (+2.7%), Books & Stationery Stores (+1.2%), Health Goods & Services (+0.5%) and Café/Restaurants/Bars (+0.3%) were the only categories to see an increase in spend when compared to the previous quarter. The greatest decreases in spend were in Travel & Accommodation (-7.5%), Clothing & Footwear (-4.6%) and Home & Building Supplies (-4.4%).

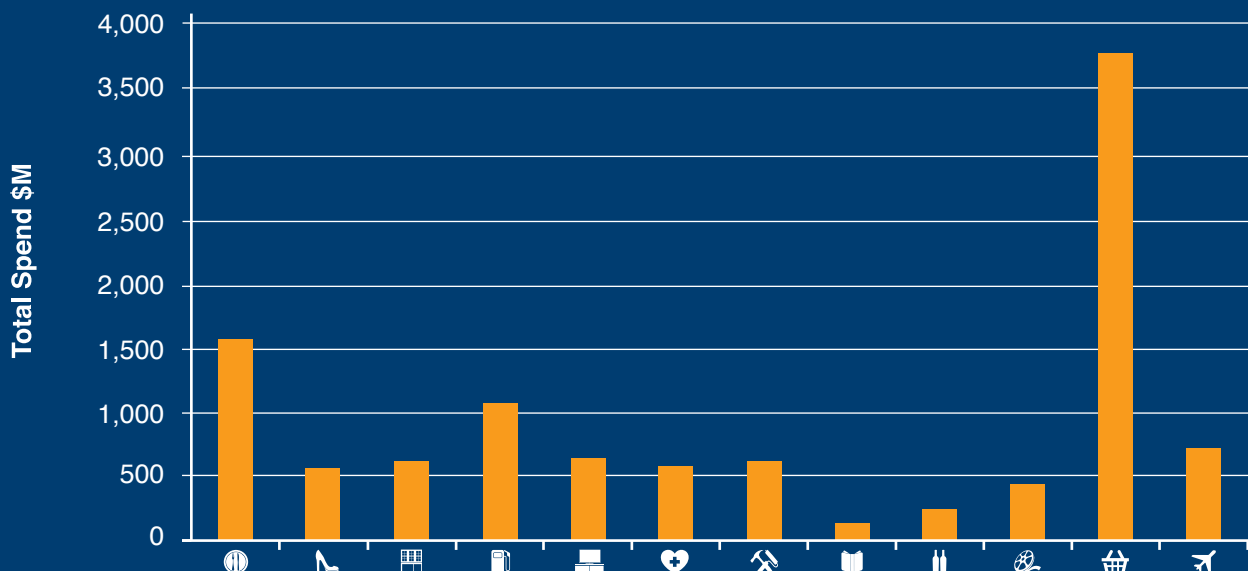
Increases in spend when compared to the same quarter last year were led by Café/Restaurants/Bars and Home & Building Supplies which both saw a 9.2% increase in spend. This increase was followed by Recreation & Entertainment (+8.3%), Books & Stationery Stores (+7.4%) and Liquor Stores (+7.4%). The only category to see a year on year decrease in quarterly spend was Fuel/Service Stations (-6.5%).

QUARTERLY SUMMARY

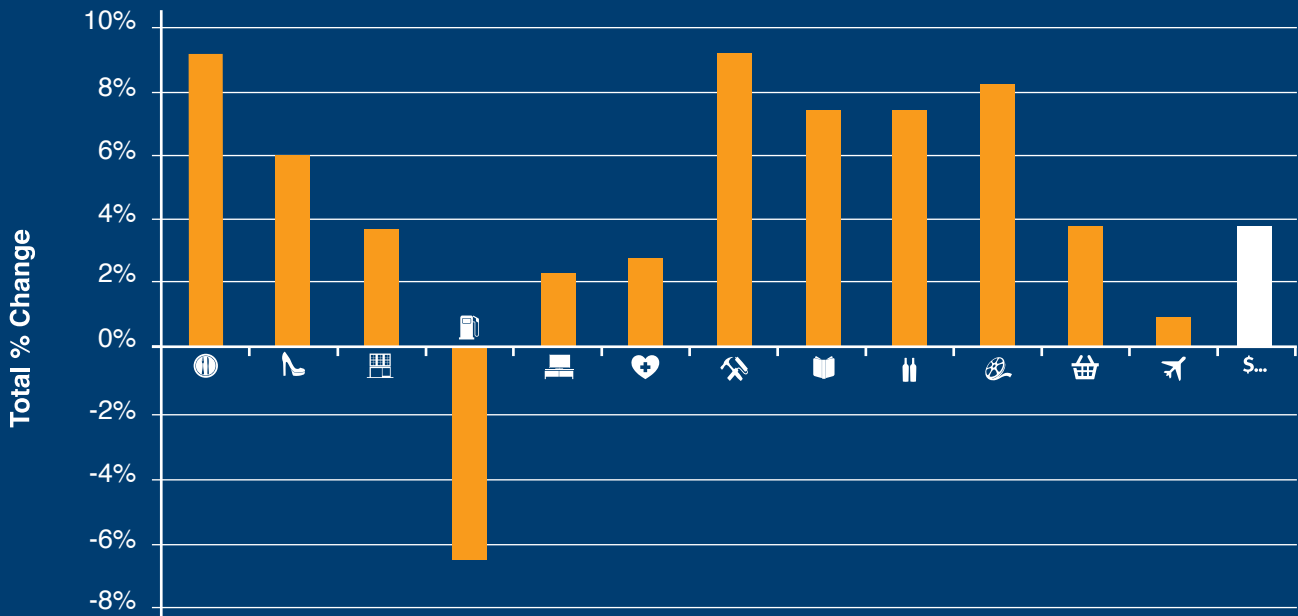
AUGUST 2016

Retailer Category	Quarter Total \$M	% Change vs Prior QTR	% Change vs QTR Last Year	% Share
 Café/Restaurants/Bars	1,594	0.3%	9.2%	14.4%
 Clothing & Footwear	592	-4.6%	6.0%	5.3%
 Department Stores	609	-1.8%	3.7%	5.5%
 Fuel/Service Stations	1,090	-0.9%	-6.5%	9.8%
 Furniture/Appliances/Electronics	652	2.7%	2.2%	5.9%
 Health Goods & Services	583	0.5%	2.7%	5.3%
 Home & Building Supplies	615	-4.4%	9.2%	5.5%
 Books & Stationery Stores	147	1.2%	7.4%	1.3%
 Liquor Stores	256	-3.9%	7.4%	2.3%
 Recreation & Entertainment	434	-0.6%	8.3%	3.9%
 Supermarkets/Food Retailers	3,797	-1.4%	3.8%	34.3%
 Travel & Accommodation	717	-7.5%	0.9%	6.5%
 TOTAL RETAIL SPEND	11,086	-1.6%	3.8%	100%

QUARTERLY RETAIL SPEND BY CATEGORY



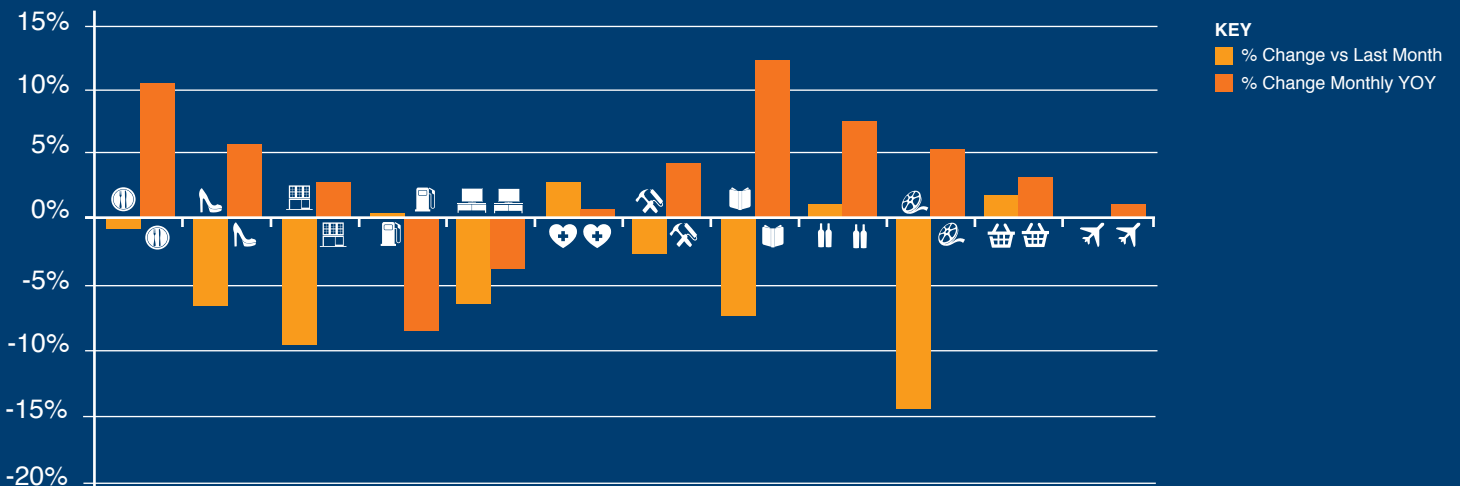
CHANGE VS LAST YEAR



SELECTED REGIONS OF INTEREST

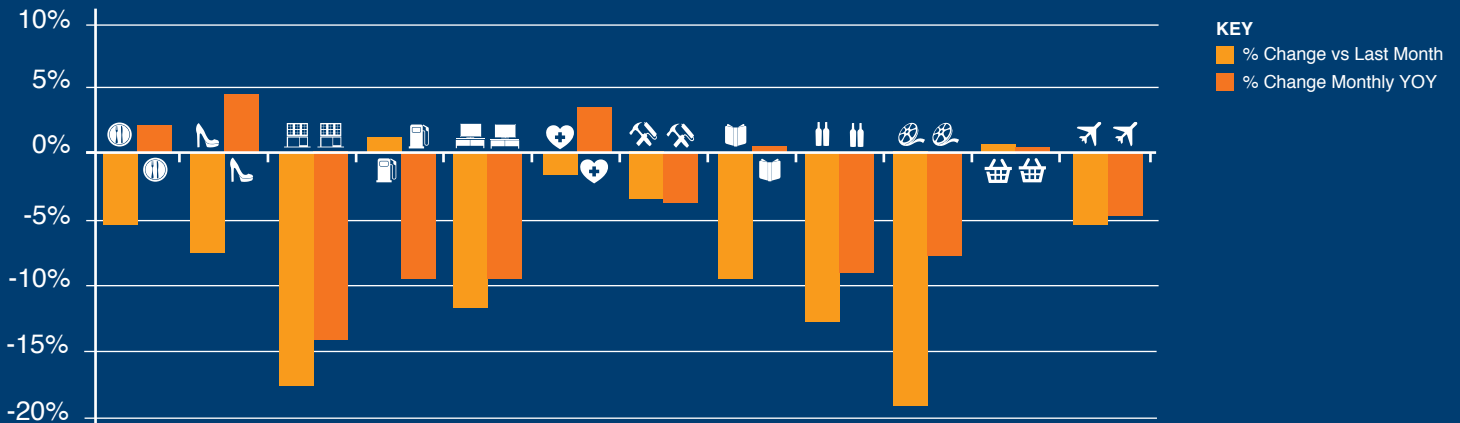
MONTHLY TRENDS - AUCKLAND

Auckland saw month on month increases in spend in the Health Goods & Services (+2.9%), Supermarkets/Food Retailers (+1.9%), Liquor Stores (+1.0%) and Fuel/Service Stations (+0.2%) categories. The greatest decreases in month on month spend were in Recreation & Entertainment (-14.3%), Department Stores (-9.6%) and Clothing & Footwear (-6.8%). Year on year, the region saw more significant increases in spend with the greatest increases in Books & Stationery Stores (+12.4%) and Café/Restaurants/Bars (+10.9%). The only decreases in spend when compared to the same period last year were in Fuel/Services Stations (-8.4%) and Furniture/Appliances/Homewares (-3.8%).



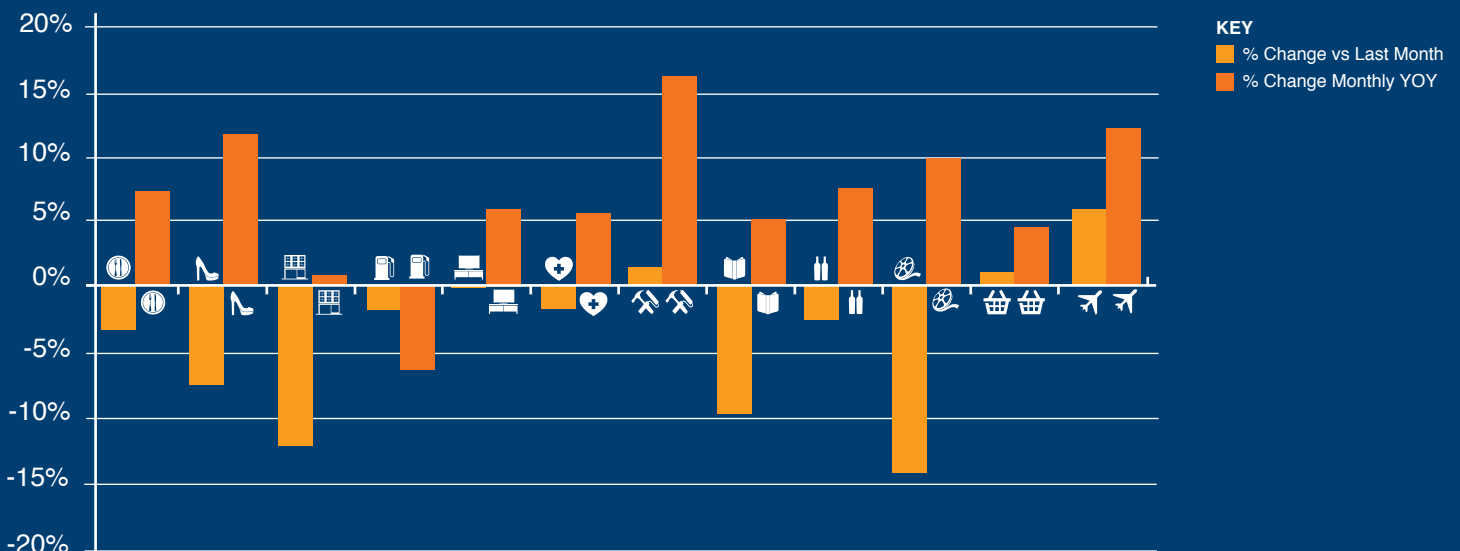
MONTHLY TRENDS - TARANAKI

The Taranaki region saw some significant decreases in spend when compared to the previous month and when compared to the same period last year. The greatest decreases in month on month spend were in Recreation & Entertainment (-19.1%), Department Stores (-17.8%), Liquor Stores (-12.8%) and Furniture/Appliances/Homewares (-11.9%). The only categories to see an increase in spend when compared to the previous month were Fuel/Service Stations (+1.1%) and Supermarkets/Food Retailers (+0.8%). Year on year, the greatest increases in spend were in Clothing & Footwear (+4.6%) and Health Goods & Services (+3.2%). Decreases in year on year spend were led by Department Stores (-14.0%), Fuel/Service Stations (-9.7%) and Furniture/Appliances/Homewares (-9.5%).



MONTHLY TRENDS - OTAGO

Otago saw month on month increases in spend in the Travel & Accommodation (+ 6.0%), Home & Building Supplies (+1.5%) and Supermarkets/Food Retailers (+1.0%) categories. The region saw the greatest decreases in spend when compared to the previous month in Recreation & Entertainment (-14.1%) and Department Stores (-12.0%), following national trends. Year on year, increases in spend were led by Home & Building Supplies (+16.3%), Travel & Accommodation (+12.5%) and Clothing & Footwear (+12.0%). The only category to see a decrease in spend compared to the same period last year was Fuel/Service Stations (-6.2%).



Café/Restaurants/Bars and Home & Building Supplies saw the greatest increase in year on year spend (+9.2%)

Northland saw the greatest increase in overall spend compared to the same period last year (+7.7%)

CATEGORIES UP THIS MONTH 11

REGIONS UP THIS MONTH 15

Fuel/Service Stations was the only category to see a decrease in year on year spend (-7.0%)

The Taranaki region again saw the greatest decrease in overall spend compared to the same period last year (-2.7%)

CATEGORIES DOWN THIS MONTH 1

REGIONS DOWN THIS MONTH 1

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