



RETAIL WATCH

VALUE OF ELECTRONIC CARD TRANSACTIONS WITHIN RETAIL CATEGORIES PERIOD ENDING 28 / 04 / 2016














SOME BACKGROUND ON THIS REPORT

Total retail spend in New Zealand for the 28 days ending 28 April 2016 was \$3.5 billion. This represents an increase of 3.5% compared to the same period last year, and an increase of 1.4% when compared to the previous month.

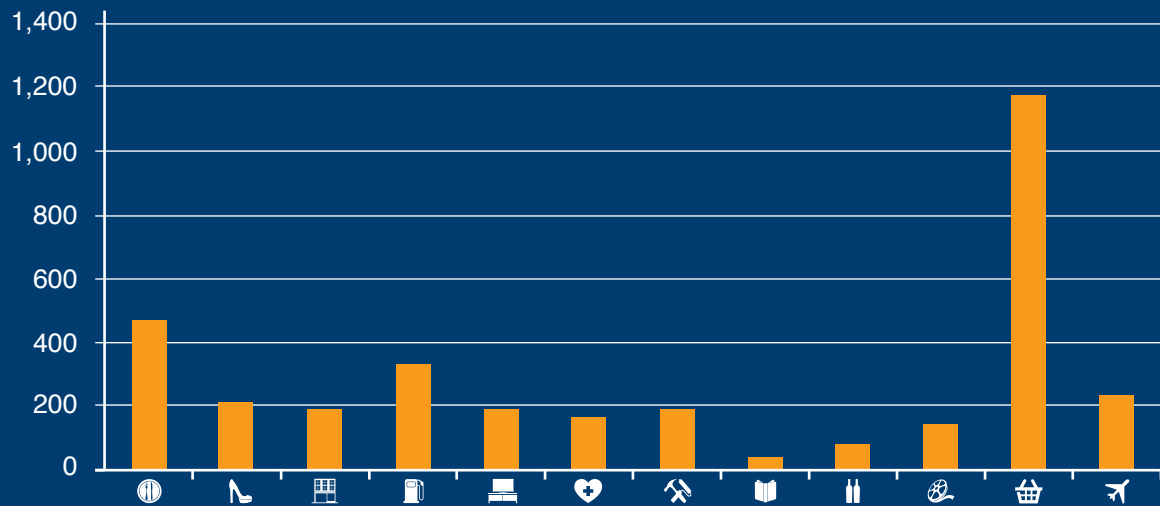
Categories with the greatest increases when compared to the previous month were Clothing & Footwear (+16.6%), Recreation & Entertainment (+10.9%) and Department Stores (+7.7%). Travel & Accommodation and Liquor Stores saw month on month decreases of 7.0% and 2.7% respectively. However, sales did increase when compared to the same period last year with Travel & Accommodation up 7.9% and Liquor Stores up 7.6%.

The Home & Building Supplies category continues to see significant increases in year on year spend, this month up 17.8% compared to the same period last year. Other categories to see notable increases in year on year spend were Health Goods & Services (+13.8%), Café/Restaurants/Bars (+8.6%) and Furniture/Appliances/Electronics (+7.6%). The only categories to see decreases in year on year spend were Fuel/Service Stations (-5.1%), Department Stores (-3.8%) and Recreation & Entertainment (-2.7%).

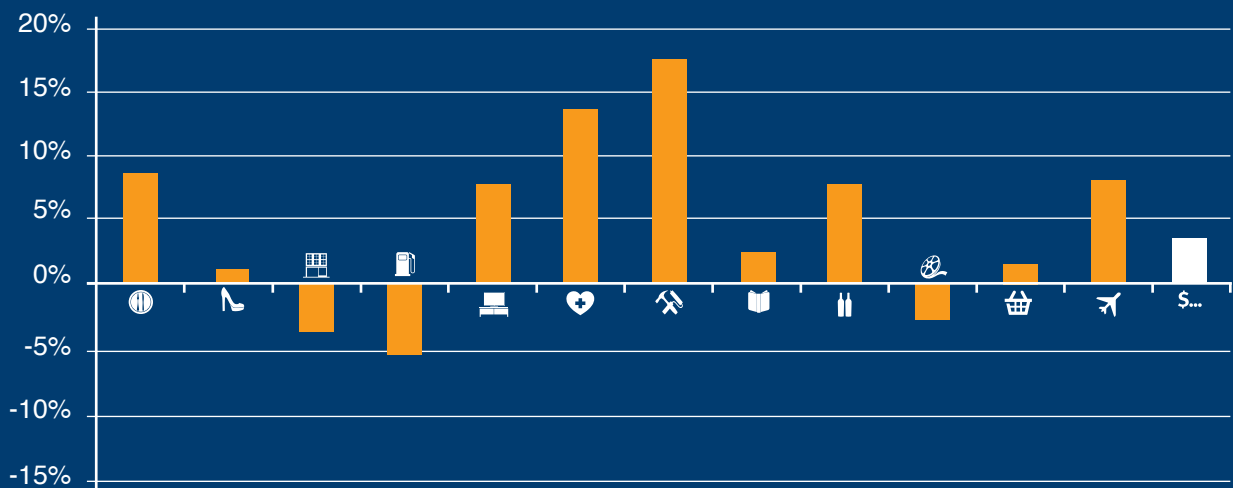
MONTHLY SUMMARY APRIL 2016

Retailer Category	Month Total \$M	% Change vs Prior Month	% Change vs Last Year	% Share
 Café/Restaurants/Bars	498	3.4%	8.6%	14.3%
 Clothing & Footwear	202	16.6%	1.2%	5.8%
 Department Stores	196	7.7%	-3.8%	5.6%
 Fuel/Service Stations	336	-2.7%	-5.1%	9.7%
 Furniture/Appliances/Electronics	198	4.5%	7.6%	5.7%
 Health Goods & Services	179	7.0%	13.8%	5.1%
 Home & Building Supplies	197	3.9%	17.8%	5.6%
 Books & Stationery Stores	44	1.5%	2.5%	1.3%
 Liquor Stores	82	-2.7%	7.6%	2.3%
 Recreation & Entertainment	143	10.9%	-2.7%	4.1%
 Supermarkets/Food Retailers	1,175	-2.0%	1.5%	33.8%
 Travel & Accommodation	228	-7.0%	7.9%	6.6%
 TOTAL RETAIL SPEND	3,478	1.4%	3.5%	100%

MONTHLY RETAIL SPEND BY CATEGORY



CHANGE VS LAST YEAR



QUARTERLY SUMMARY

APRIL 2016














The total quarterly retail spend for the 91 days ending 28 April 2016 was \$11.3 billion. This is a decrease of 6.8% compared to the previous quarter and an increase of 2.8% when compared to the same period last year. The decrease in spend compared to the previous quarter is expected as the previous quarter includes the high spend months of December and January.

Travel & Accommodation and Health Goods & Services were the only categories to see an increase in spend when compared to the previous quarter, up 12.9% and 2.4%, respectively. The greatest decreases in spend when compared to the previous quarter were in Department Stores (-31.2%), Books & Stationery Stores (-19.9%), Furniture/Appliances/Electronics (-18.2%) and Clothing & Footwear (-17.0%).

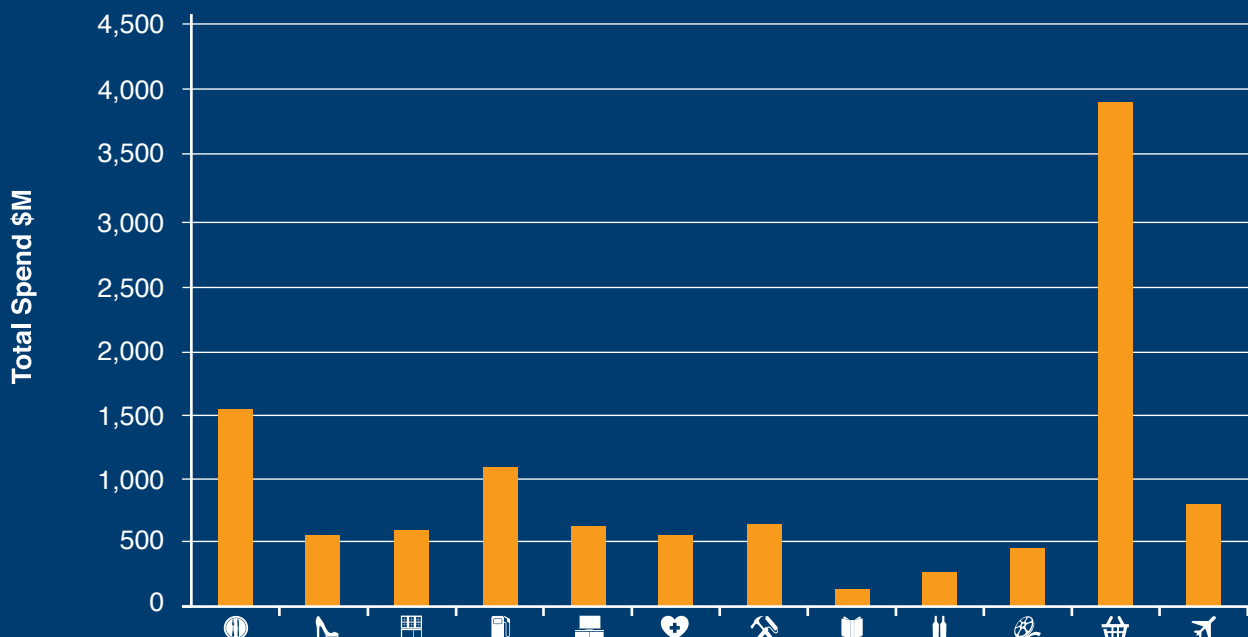
Home & Building Supplies again saw a decrease when compared to the previous quarter (-13.7%) but an increase when compared to the same period last year (+15.8%). Other categories which saw notable year on year increases were Liquor Stores (+7.9%), Café/Restaurants/Bars (+7.5%), Furniture/Appliances/Electronics (+5.5%) and Travel & Accommodation (+5.2%). The greatest decreases in spend when compared to the same period last year were seen in Books & Stationery Stores (-8.0%), Fuel/Service Stations (-4.0%) and Department Stores (-2.2%).

QUARTERLY SUMMARY

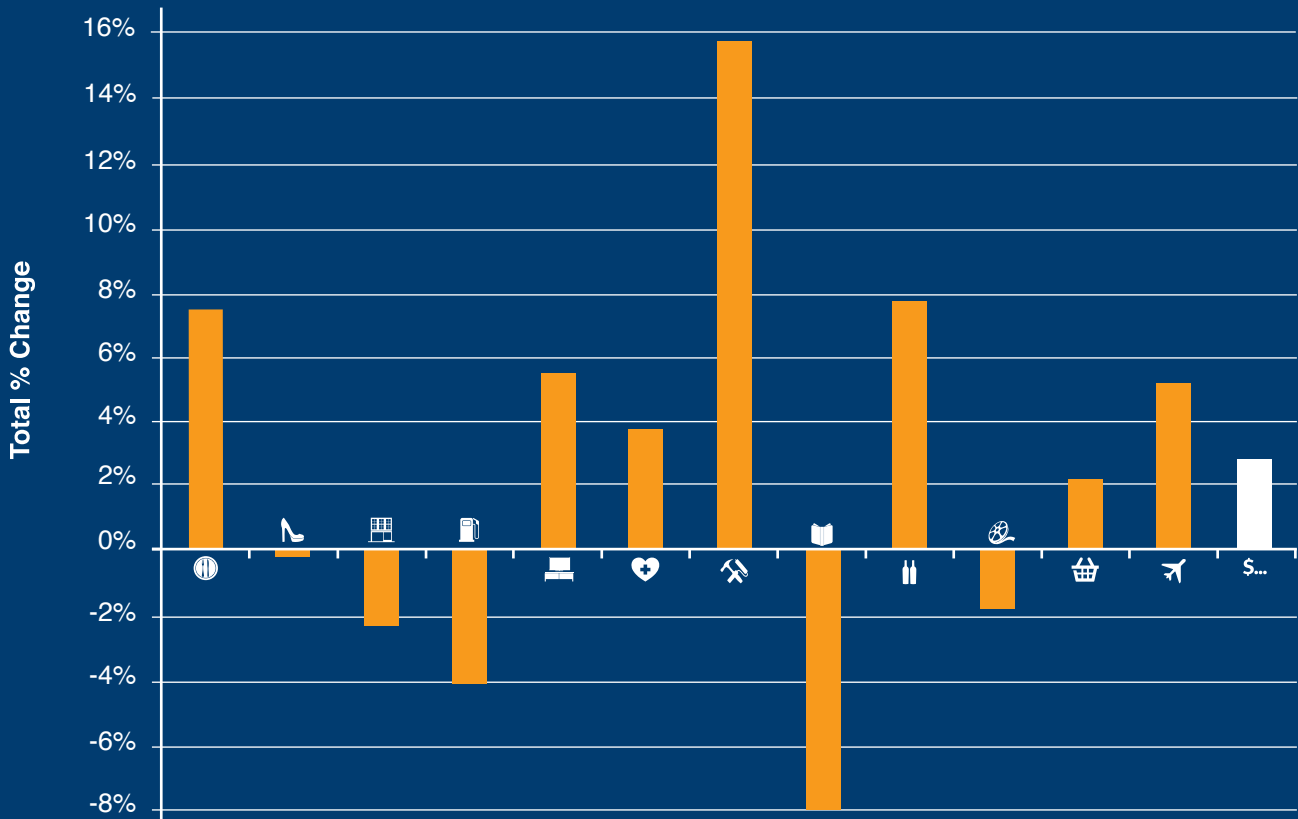
APRIL 2016

Retailer Category	Quarter Total \$M	% Change vs Prior QTR	% Change vs QTR Last Year	% Share
 Café/Restaurants/Bars	1,572.5	0.1%	7.5%	14.0%
 Clothing & Footwear	583.6	-17.0%	-0.2%	5.2%
 Department Stores	600.2	-31.2%	-2.2%	5.3%
 Fuel/Service Stations	1,105.8	-4.3%	-4.0%	9.8%
 Furniture/Appliances/Electronics	633.0	-18.2%	5.5%	5.6%
 Health Goods & Services	560.6	2.4%	3.9%	5.0%
 Home & Building Supplies	637.7	-13.7%	15.8%	5.7%
 Books & Stationery Stores	148.1	-19.9%	-8.0%	1.3%
 Liquor Stores	273.3	-13.7%	7.9%	2.4%
 Recreation & Entertainment	440.7	-1.3%	-1.9%	3.9%
 Supermarkets/Food Retailers	3,895.2	-3.9%	2.2%	34.6%
 Travel & Accommodation	804.9	12.9%	5.2%	7.2%
 TOTAL RETAIL SPEND	11,255.7	-6.8%	2.8%	100%

QUARTERLY RETAIL SPEND BY CATEGORY



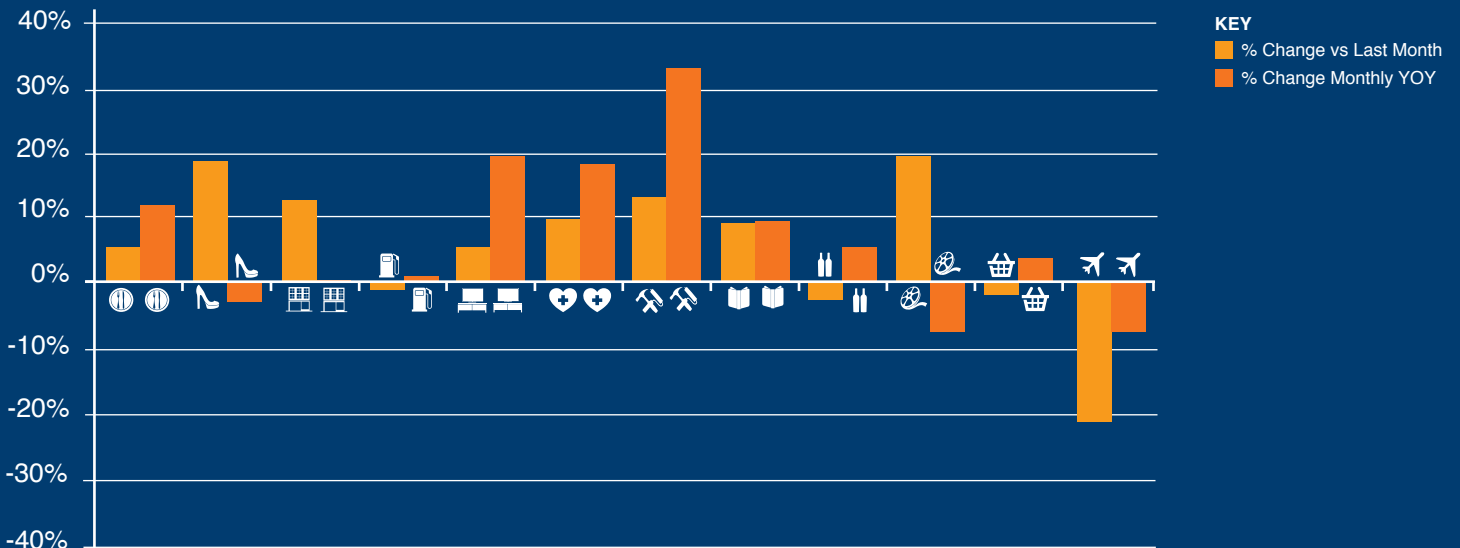
CHANGE VS LAST YEAR



SELECTED REGIONS OF INTEREST

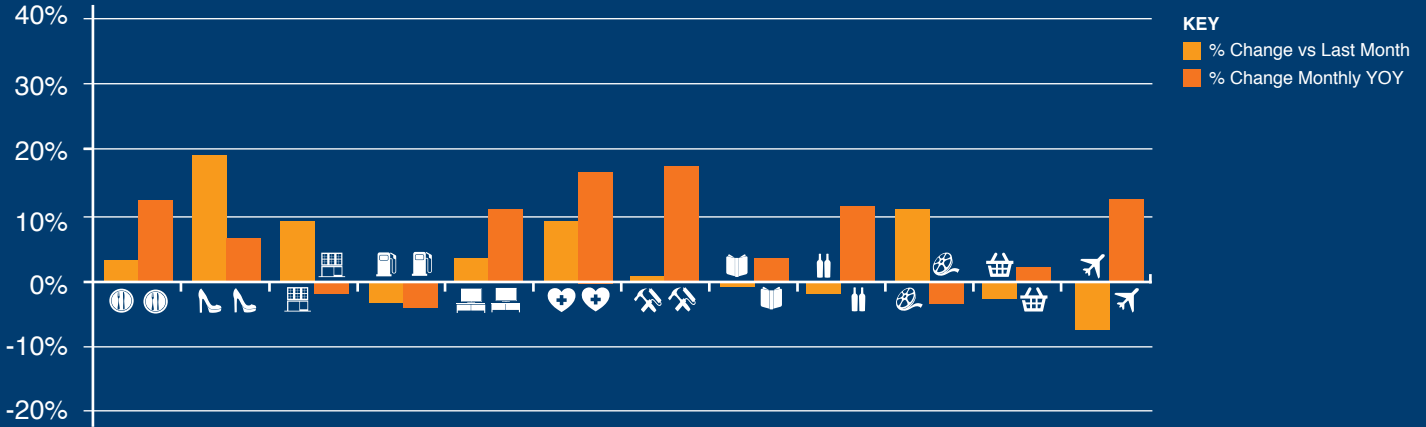
MONTHLY TRENDS - NORTHLAND

Northland saw significant increases in spend in some categories this month. The greatest increases in month on month spend were in the Recreation & Entertainment (+19.6%), Clothing & Footwear (+18.8%), Home & Building Supplies (+13.6%) and Department Stores (+12.4%) categories. These increases are all higher than the national increases in month on month spend. The region saw a strong decrease in Travel & Accommodation spend of 21.3% when compared to the previous month. Northland also experienced year on year increases which were greater than national increases in the Home & Building Supplies (+33.9%), Furniture/Appliances/Homewares (+19.9%), Health Goods & Services (+18.2%) and Café/Restaurants/Bars (+12.1%) categories. The greatest decrease in year on year spend was in the Recreation & Entertainment (-7.7%) category, despite the high increase in spend when compared to the previous month.



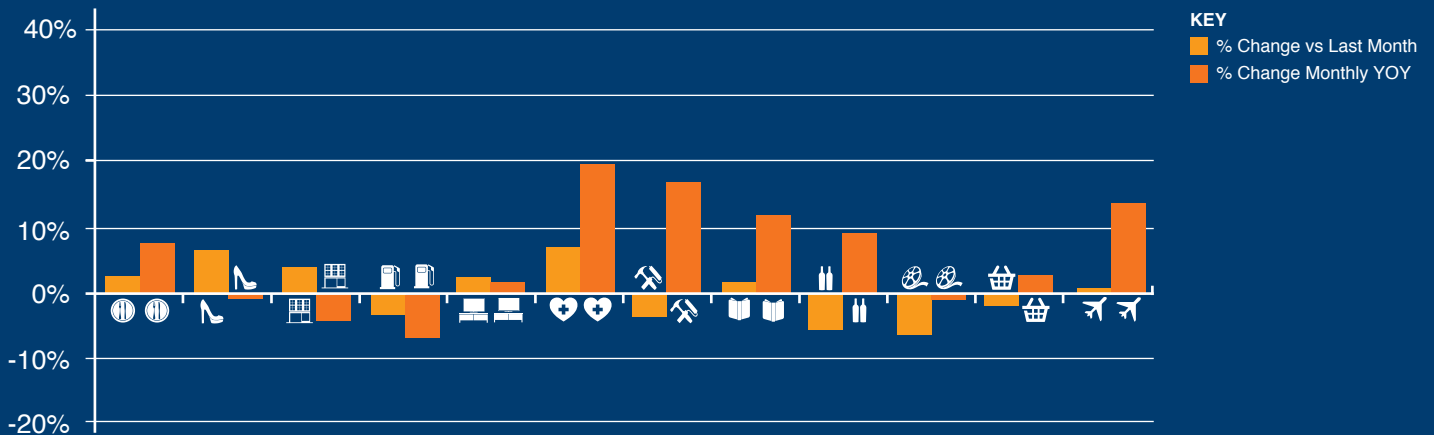
MONTHLY TRENDS - AUCKLAND

Auckland followed national trends with month on month increases in spend in the Clothing & Footwear (+19.1%), Health Goods & Services (+9.8%) and Department Stores (+9.1%) categories. The region also saw a significant increase in Recreation & Entertainment spend, up 10.8% when compared to the previous month. Month on month decreases were led by Travel & Accommodation (-7.8%) and Fuel & Service Stations (-3.7%). Increases in spend when compared to the same period last year also followed national trends with Home & Building Supplies (+17.2%), Health Goods & Services (+16.6%), Travel & Accommodation (+12.4%) and Café/Restaurants/Bars (+12.2%) categories showing the greatest increases. The only categories to see a year on year decrease in spend were Fuel & Service Stations (-4.1%), Recreation & Entertainment (-3.7%) and Department Stores (-1.7%)



MONTHLY TRENDS - OTAGO

The Otago region saw only moderate increases and decreases in spending when compared to the previous month. Increases in month on month spend were led by Health Goods & Services (+7.2%) and Clothing & Footwear (+6.5%). Decreases in spend when compared to the previous month were greatest in the Recreation & Entertainment (-6.0%) and Liquor Stores (-5.7%) categories. The region did see more significant changes in year on year spending with the greatest increases in Health Goods & Services (+19.7%) and Home & Building Supplies (+17.3%). Otago also saw increases in the Travel & Accommodation (+14.0%), Books & Stationery (+12.1%) and Liquor Stores (+9.7%) categories that were greater than the national increases in year on year spend. The greatest decreases in year on year spend were seen in Fuel & Services Stations (-6.5%) and Department Stores (-4.0%) categories.



Clothing & Footwear saw the greatest month on month increase in spend (+16.6%)

The greatest increase compared to the same period last year was in Home & Building Supplies (+17.8%)

Northland had the greatest increase in overall spend compared to the same period last year (+6.0%)

CATEGORIES UP THIS MONTH 8

REGIONS UP THIS MONTH 14

Travel & Accommodation saw the greatest month on month decrease in spend (-7.0%)

Department Stores again saw the greatest decrease in spend when compared to the previous quarter (-31.2%)

The West Coast region saw the greatest decrease in overall spend compared to the same period last year (-1.8%)

CATEGORIES DOWN THIS MONTH 4

REGIONS DOWN THIS MONTH 2

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

