



RETAIL WATCH

VALUE OF ELECTRONIC CARD TRANSACTIONS WITHIN RETAIL CATEGORIES PERIOD ENDING 28 / 06 / 2016














SOME BACKGROUND ON THIS REPORT

Total retail spend in New Zealand for the 28 days ending 28 June 2016 was \$3.4 billion. This represents a decrease of 0.9% compared to the previous month and an increase of 3.1% compared to the same period last year.

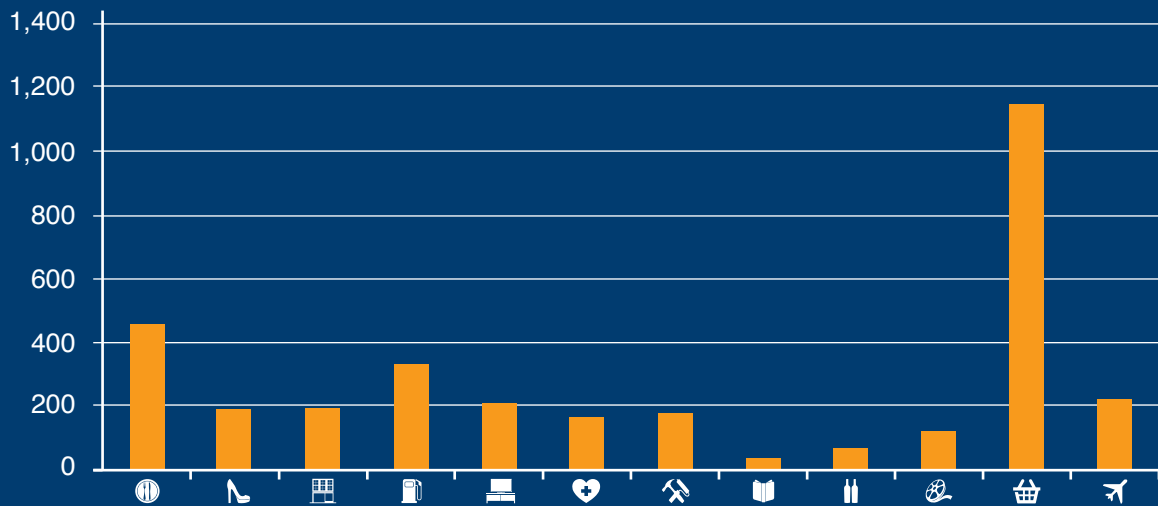
Categories which saw an increase in spend compared to the previous month were Furniture/Appliances/Electronics (+5.5%), Fuel/Service Stations (+1.5%), Clothing & Footwear (+1.1%) and Department Stores (+0.9%). All other categories saw a decrease in month on month spend.

The greatest decreases were seen in Travel & Accommodation (-7.3%), Books & Stationery Stores (-5.3%) and Health Goods & Services (-5.1%). Increases in spend compared to the same period last year were led by Café/Restaurants/Bars (+9.5%), Liquor Stores (+8.9%), Clothing & Footwear (+7.3%) and Home & Building Supplies (+7.3%). Fuel/Service Stations (-5.6%) and Travel & Accommodation (-4.5%) were the only categories to see a year on year decrease in spend this month.

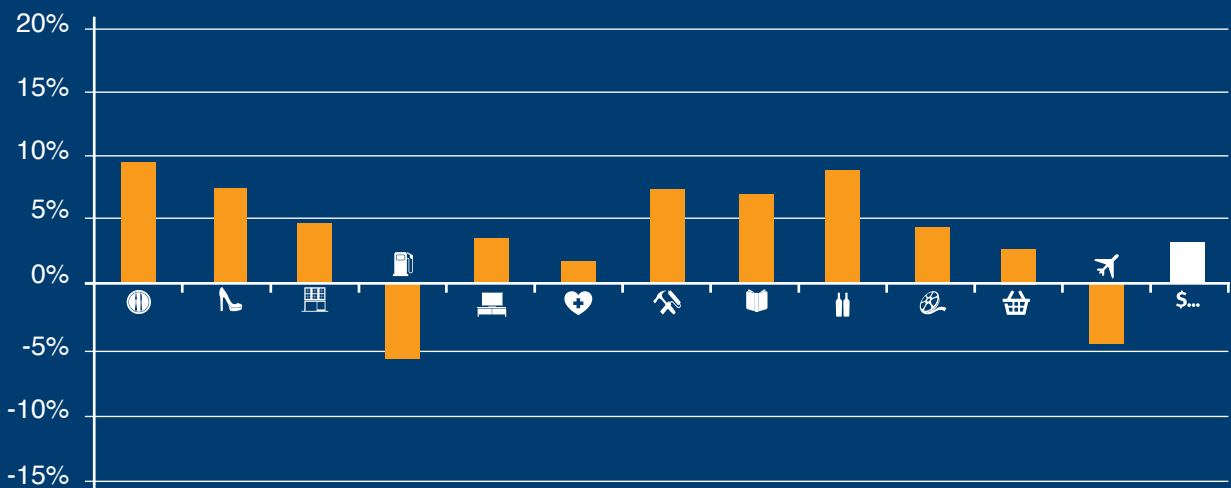
MONTHLY SUMMARY JUNE 2016

Retailer Category	Month Total \$M	% Change vs Prior Month	% Change vs Last Year	% Share
 Café/Restaurants/Bars	479	-0.4%	9.5%	14.1%
 Clothing & Footwear	197	1.1%	7.3%	5.8%
 Department Stores	197	0.9%	4.8%	5.8%
 Fuel/Service Stations	339	1.5%	-5.6%	10.0%
 Furniture/Appliances/Electronics	205	5.5%	3.4%	6.0%
 Health Goods & Services	177	-5.1%	1.8%	5.2%
 Home & Building Supplies	182	-3.7%	7.3%	5.4%
 Books & Stationery Stores	43	-5.3%	6.9%	1.3%
 Liquor Stores	79	-0.7%	8.9%	2.3%
 Recreation & Entertainment	127	-0.6%	4.6%	3.7%
 Supermarkets/Food Retailers	1,158	-0.9%	2.7%	34.1%
 Travel & Accommodation	214	-7.3%	-4.5%	6.3%
 TOTAL RETAIL SPEND	3,397	-0.9%	3.1%	100%

MONTHLY RETAIL SPEND BY CATEGORY



CHANGE VS LAST YEAR



QUARTERLY SUMMARY JUNE 2016














The total quarterly retail spend for the 91 days ending 28 June 2016 was \$11.2 billion. This is an increase of 0.5% compared to the previous quarter and an increase of 3.4% when compared to the same period last year.

Health Goods & Services again saw a significant increase in spend when compared to the previous quarter, this month up 15.7%. This was followed by Clothing & Footwear which saw an increase in spend of 15.3% compared to the previous quarter. Other categories to see an increase in spend compared to the previous quarter were Department Stores (+6.8%), Furniture/Appliances/Electronics (+4.8%) and Café/Restaurants/Bars (+2.4%). The greatest decreases in spend when compared to the previous quarter were in Travel & Accommodation (-9.5%), Liquor Stores (-7.7%) and Books & Stationery Stores (-5.0%).

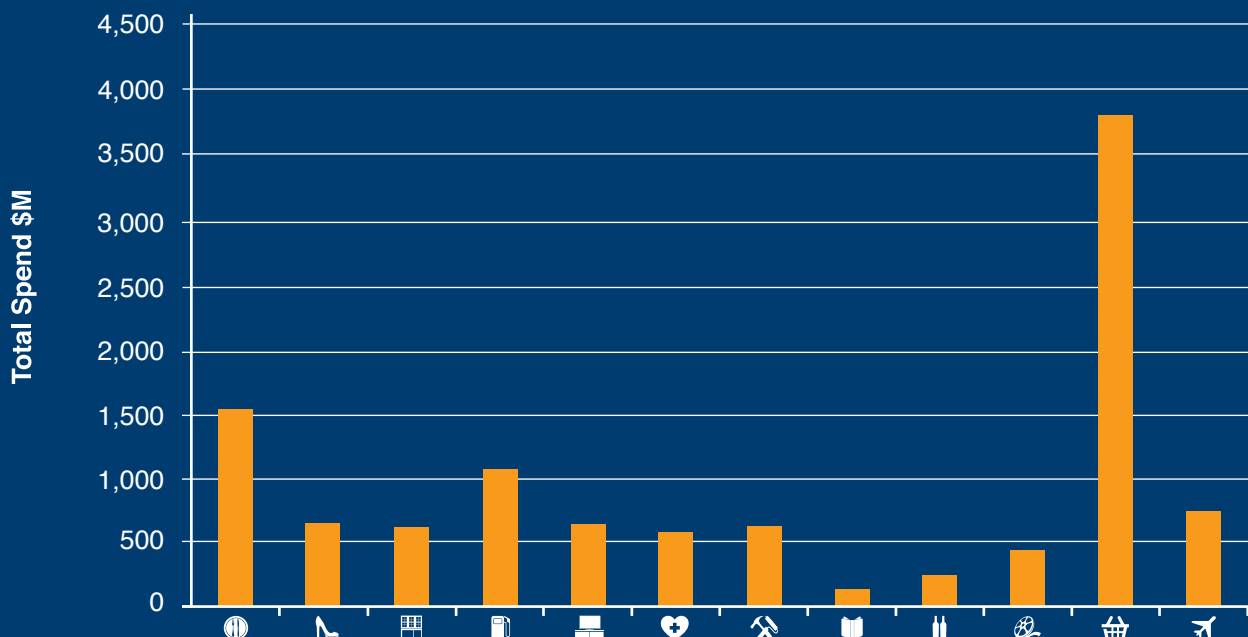
Home & Building Supplies again led increases in spend when compared to the same quarter the previous year, up 12.1%. This was followed by Books & Stationery Stores (+9.3%), Café/Restaurants/Bars (+8.5%) and Liquor Stores (+8.0%). Categories which saw a decrease in year on year spend were Fuel/Service Stations (-5.3%) and Department Stores (-0.3%).

QUARTERLY SUMMARY

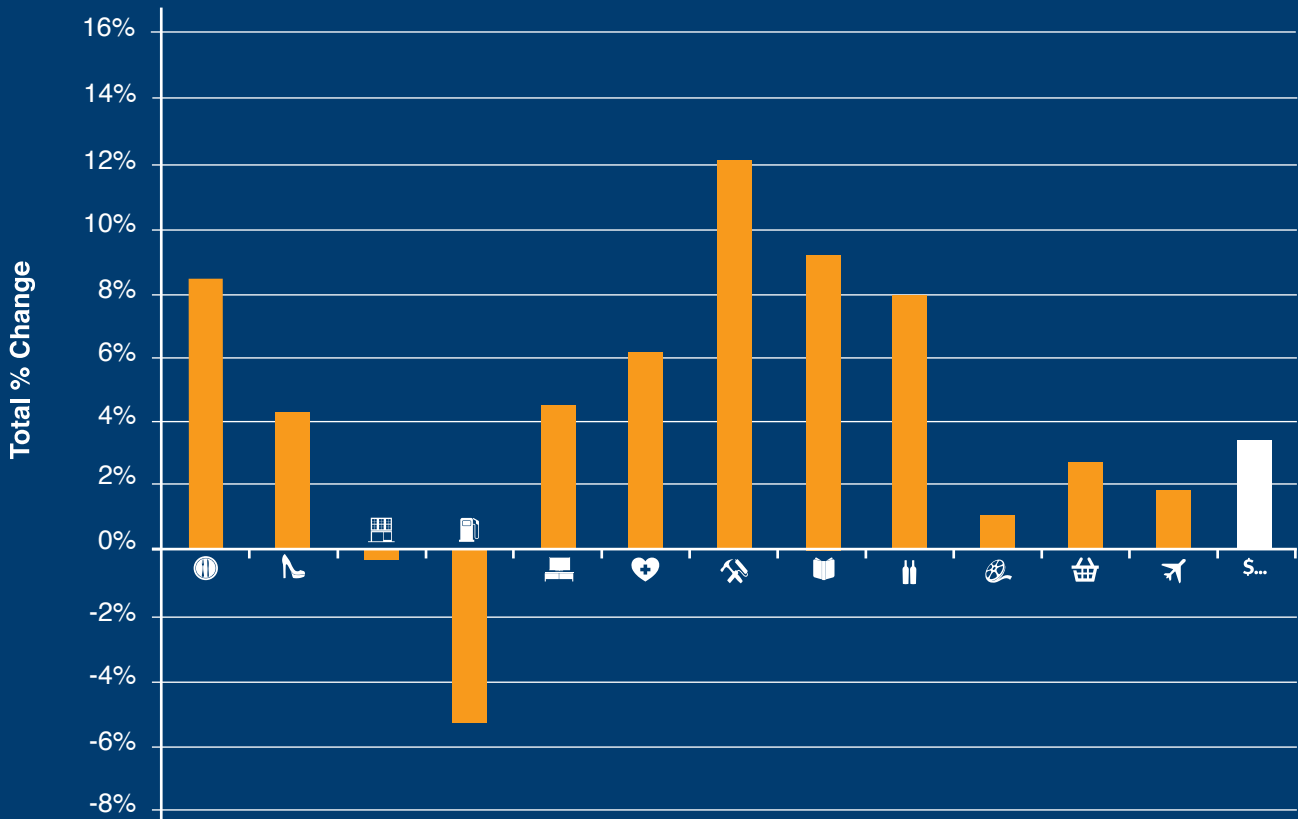
JUNE 2016

Retailer Category	Quarter Total \$M	% Change vs Prior QTR	% Change vs QTR Last Year	% Share
 Café/Restaurants/Bars	1,579.9	2.4%	8.5%	14.1%
 Clothing & Footwear	645.1	15.3%	4.2%	5.8%
 Department Stores	635.9	6.8%	-0.3%	5.7%
 Fuel/Service Stations	1,094.5	-0.8%	-5.3%	9.8%
 Furniture/Appliances/Electronics	650.5	4.8%	4.5%	5.8%
 Health Goods & Services	590.0	15.7%	6.1%	5.3%
 Home & Building Supplies	632.8	0.0%	12.1%	5.6%
 Books & Stationery Stores	144.8	-5.0%	9.3%	1.3%
 Liquor Stores	260.0	-7.7%	8.0%	2.3%
 Recreation & Entertainment	433.7	-0.4%	1.0%	3.9%
 Supermarkets/Food Retailers	3,802.1	-2.6%	2.8%	33.9%
 Travel & Accommodation	740.4	-9.5%	1.9%	6.6%
 TOTAL RETAIL SPEND	11,209.7	0.5%	3.4%	100%

QUARTERLY RETAIL SPEND BY CATEGORY



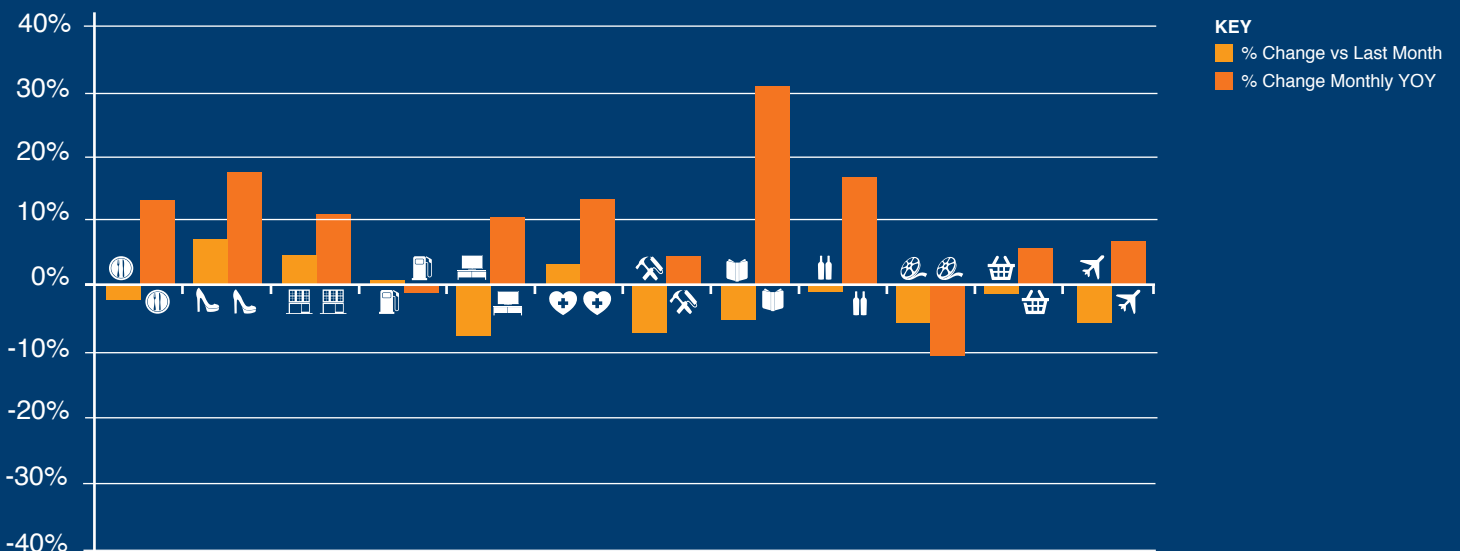
CHANGE VS LAST YEAR



SELECTED REGIONS OF INTEREST

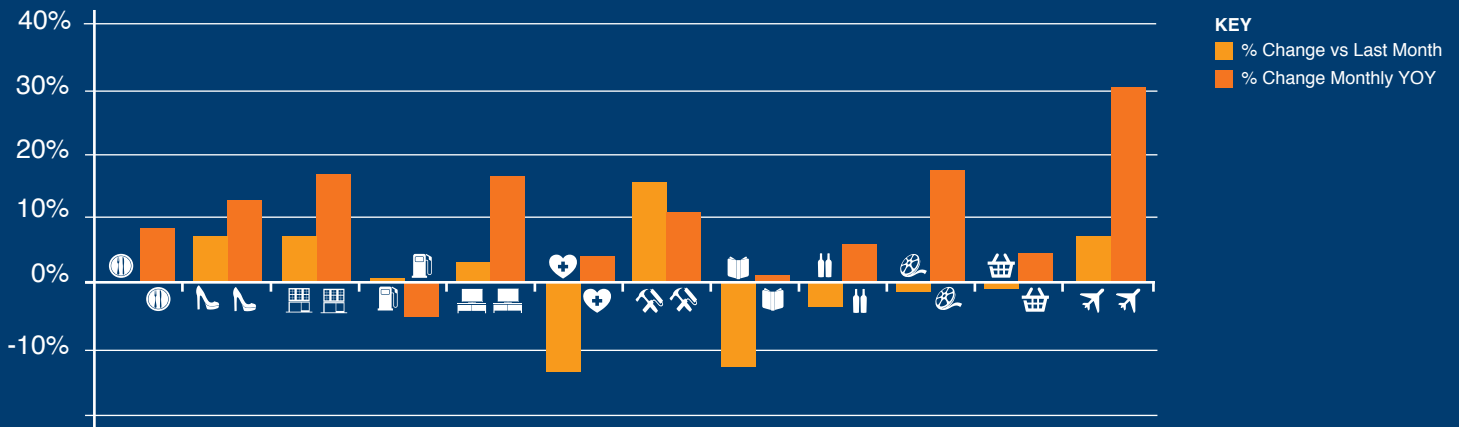
MONTHLY TRENDS - NORTHLAND

Northland saw significant increases in year on year spend this month despite a decrease in spend compared to the previous month for most categories. Clothing & Footwear (+7.3%) and Department Stores (+4.4%) saw the greatest increase in month on month spend. The greatest decreases in month on month spend were in Furniture/Appliances/Homewares (-7.8%), Home & Building Supplies (-6.4%) and Recreation & Entertainment (-5.8%) categories. Increases in year on year spend were led by Books & Stationery Stores (+31.3%), Clothing & Footwear (+17.7%) and Liquor Stores (+16.3%). Recreation & Entertainment (-10.2%) and Fuel & Service Stations (-1.5%) were the only categories to see a decrease in spend compared to the same period last year.



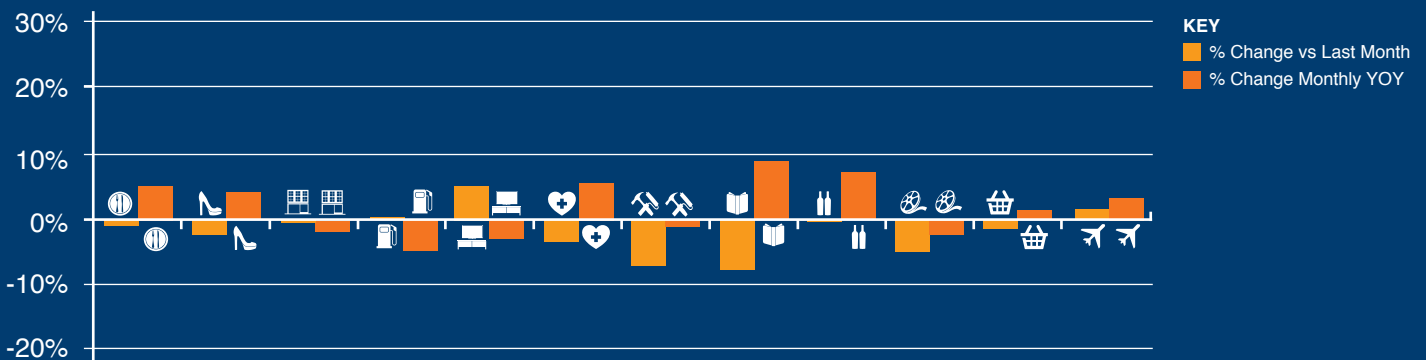
MONTHLY TRENDS - GISBORNE

The Gisborne region saw the greatest increase in overall spend compared to the same period last year. Home & Building Supplies (+15.9%), Travel & Accommodation (+7.6%) and Clothing & Footwear (+7.0%) saw the greatest increases in spend compared to the previous month. Health Goods & Services (-13.7%) and Books & Stationery Stores (-12.6%) saw the greatest decreases in month on month spend. Gisborne saw an increase in Travel & Accommodation spend when compared to the previous month (+7.6%) and when compared to the same period the last year (+30.7%). Other categories to see a significant increase in year on year spend were Recreation & Entertainment (+17.5%), Department Stores (+16.7%) and Furniture/Appliances/Homewares (+16.4%). Fuel & Services Stations was the only category to see a decrease in spend when compared to the same period last year, down 5.0%.



MONTHLY TRENDS - CANTERBURY

Canterbury saw a month on month increase in spend in Furniture/Appliances/Homewares (+5.0%), Travel & Accommodation (+1.9%) and Fuel & Service Stations (+0.2%). Decreases in spend compared to the previous month were greatest in the Books & Stationery Stores (-7.9%) and Home & Building Supplies (-7.0%) categories, below the national decrease in spend for these categories. Increases in year on year spend were led by Books & Stationery Stores (+9.0%), Liquor Stores (+7.3%) and Café/Restaurants/Bars (+5.0%). Canterbury saw decreases in year on year spend in Fuel & Service Stations (-4.5%), Furniture/Appliances/Homewares (-2.5%), Recreation & Entertainment (-2.3%), Department Stores (-2.0%) and Home & Building Supplies (-1.5%) categories.



Furniture/Appliances/Homewares saw the greatest increase in month on month spend (+5.5%)

Café/Restaurants/Bars saw the greatest monthly spend increase compared to the same period last year (+9.5%)

Gisborne had the greatest increase in overall spend compared to the same period last year (+7.8%)

CATEGORIES UP THIS MONTH 4

REGIONS UP THIS MONTH 4

Travel & Accommodation saw the greatest month on month decrease in spend (-7.3%)

Fuel & Service Stations saw the greatest decrease in spend when compared to the same period last year (-5.6%)

The Taranaki region saw the greatest decrease in overall spend compared to the same period last year (-3.5%)

CATEGORIES DOWN THIS MONTH 8

REGIONS DOWN THIS MONTH 12

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

