



RETAIL WATCH

VALUE OF ELECTRONIC CARD TRANSACTIONS WITHIN RETAIL CATEGORIES PERIOD ENDING 28 / 05 / 2016

SOME BACKGROUND ON THIS REPORT

Total retail spend in New Zealand for the 28 days ending 28 May 2016 was \$3.4 billion. This represents an increase of 1.8% compared to the same period last year, and a decrease of 3.5% when compared to the previous month.

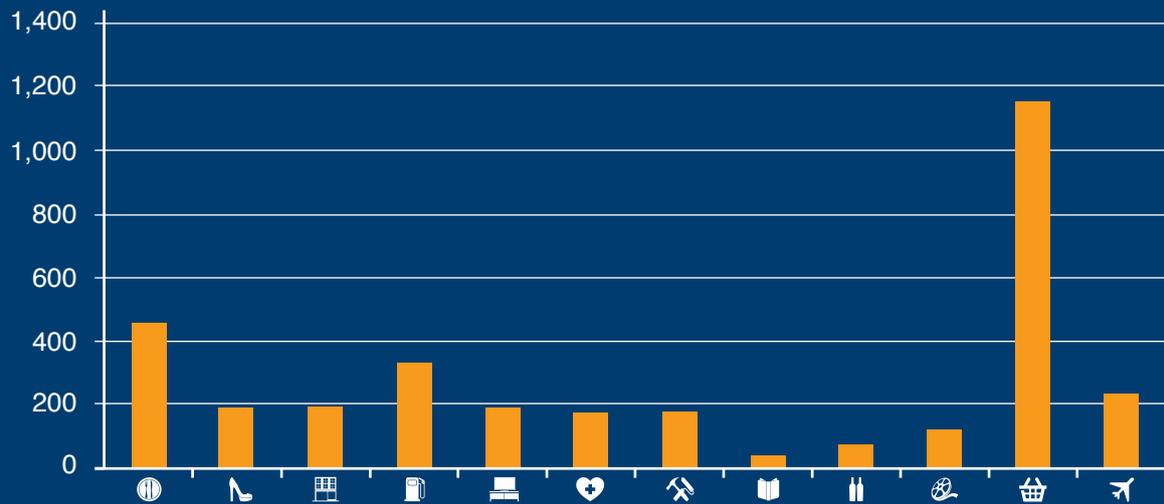
The only categories which saw an increase in spend compared to the previous month were Health Goods & Services (+1.5%) and Books & Stationery Stores (+1.1%). The greatest month on month decreases were seen in Recreation & Entertainment (-13.0%), Home & Building Supplies (-6.5%) and Clothing and Footwear (-6.0%).

Increases in spend compared to the same period last year were led by Liquor stores (+8.0%), Café/Restaurants/Bars (+7.4%) and Home & Building Supplies (+6.9%). Fuel/Service Stations saw the greatest year on year decrease, down 6.8% this month. Other categories to see year on year decreases in spend were Books & Stationery Stores (-3.7%) and Travel & Accommodation (-3.2%).

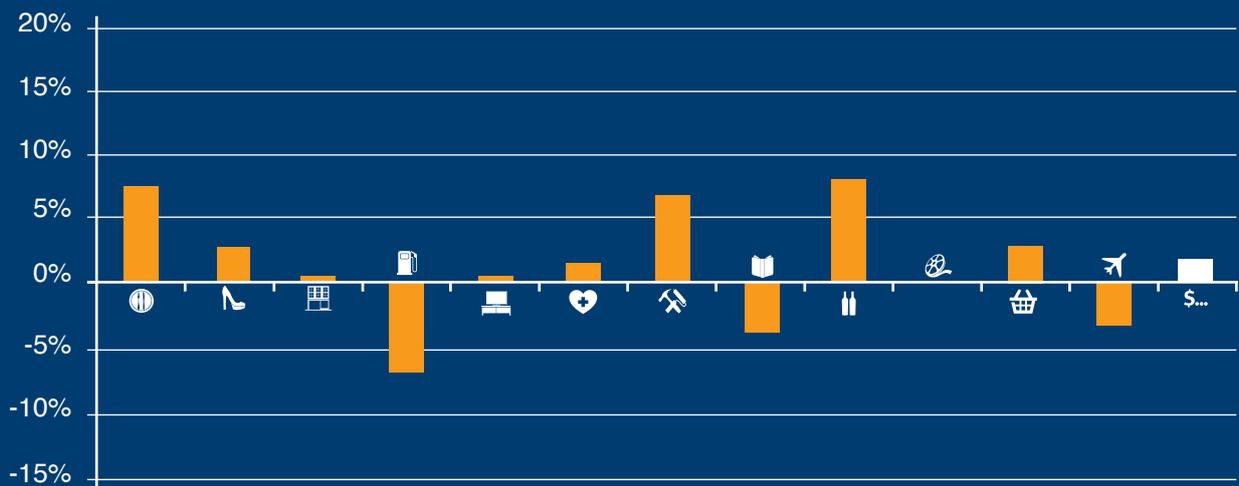
MONTHLY SUMMARY MAY 2016

Retailer Category	Month Total \$M	% Change vs Prior Month	% Change vs Last Year	% Share
 Café/Restaurants/Bars	476	-4.8%	7.4%	14.1%
 Clothing & Footwear	191	-6.0%	2.8%	5.7%
 Department Stores	193	-2.4%	0.4%	5.7%
 Fuel/Service Stations	330	-2.2%	-6.8%	9.8%
 Furniture/Appliances/Electronics	190	-4.6%	0.4%	5.6%
 Health Goods & Services	183	1.5%	1.5%	5.4%
 Home & Building Supplies	185	-6.5%	6.9%	5.5%
 Books & Stationery Stores	45	1.1%	-3.7%	1.3%
 Liquor Stores	78	-4.6%	8.0%	2.3%
 Recreation & Entertainment	125	-13.0%	0.0%	3.7%
 Supermarkets/Food Retailers	1,155	-2.1%	2.9%	34.2%
 Travel & Accommodation	222	-4.0%	-3.2%	6.6%
 TOTAL RETAIL SPEND	3,374	-3.5%	1.8%	100%

MONTHLY RETAIL SPEND BY CATEGORY



CHANGE VS LAST YEAR



QUARTERLY SUMMARY MAY 2016

The total quarterly retail spend for the 91 days ending 28 May 2016 was \$11.2 billion. This is a decrease of 6.0% compared to the previous quarter and an increase of 3.0% when compared to the same period last year.

Health Goods & Services was the only category to see a significant increase in spend when compared to the previous quarter, up 8.3%. The greatest decreases in spend when compared to the previous quarter were in Department Stores (-23.7%), Books & Stationery Stores (-20.4%), Liquor Stores (-16.2%) and Furniture/Appliances/Electronics (-14.7%).

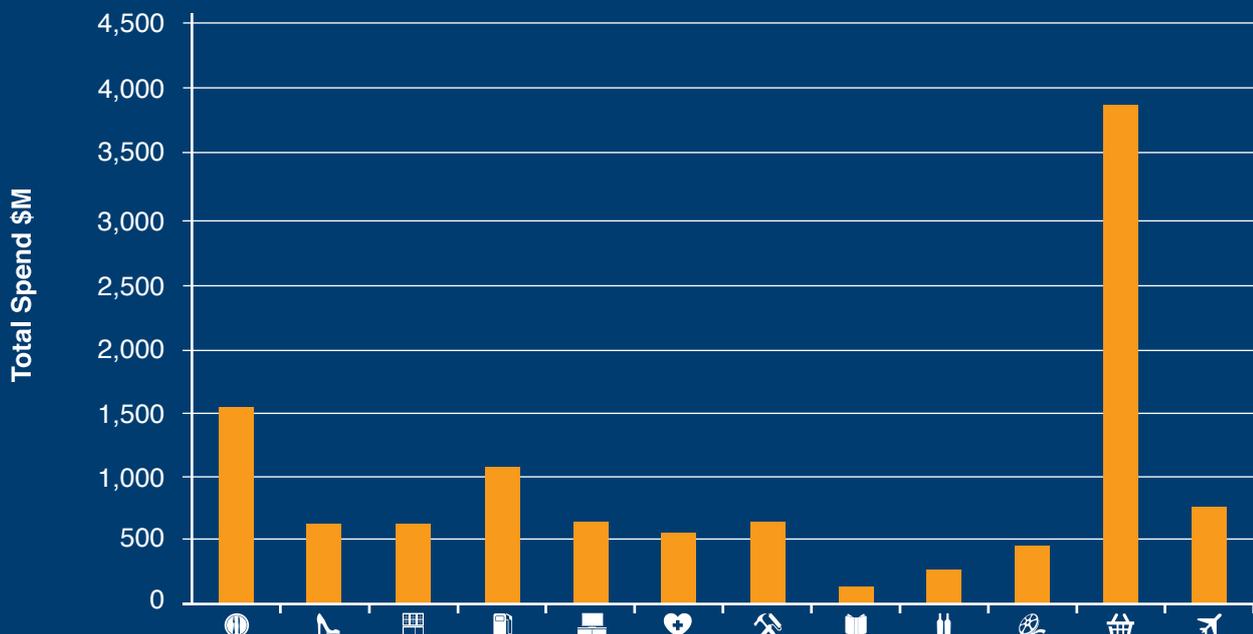
Home & Building Supplies again led increases in year on year spend, up 14.6%. This was followed by Café/Restaurants/Bars (+8.0%), Liquor Stores (+7.6%) and Furniture/Appliances/Electronics (+5.1%). Categories which saw a decrease in spend when compared to the same quarter the previous year were Fuel/Service Stations (-5.3%), Books & Stationery Stores (-3.8%), Recreation & Entertainment (-1.5%) and Department Stores (-0.9%).

QUARTERLY SUMMARY

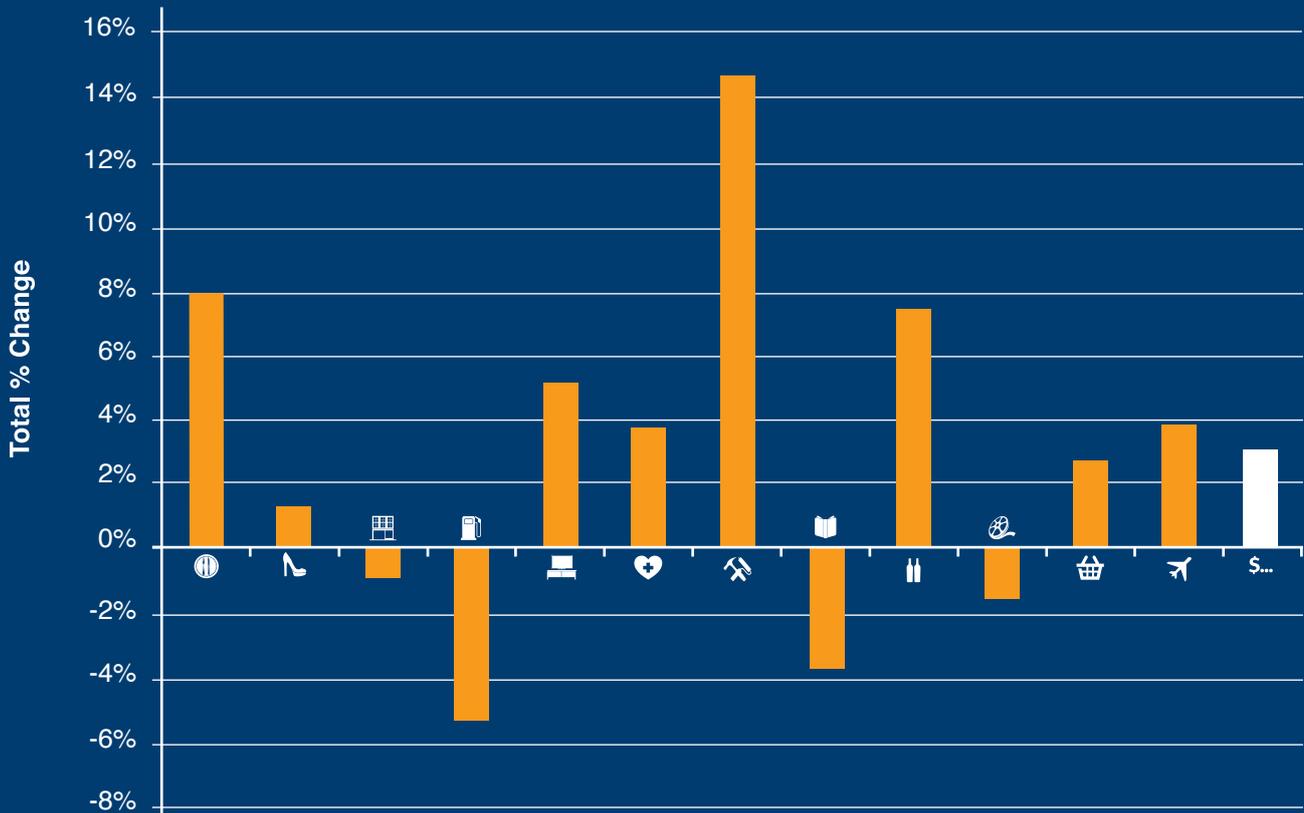
MAY 2016

Retailer Category	Quarter Total \$M	% Change vs Prior QTR	% Change vs QTR Last Year	% Share
 Café/Restaurants/Bars	1,579.4	0.6%	8.0%	14.1%
 Clothing & Footwear	616.3	-7.3%	1.3%	5.5%
 Department Stores	616.9	-23.7%	-0.9%	5.5%
 Fuel/Service Stations	1,095.5	-3.5%	-5.3%	9.8%
 Furniture/Appliances/Electronics	630.8	-14.7%	5.1%	5.6%
 Health Goods & Services	576.2	8.3%	3.9%	5.1%
 Home & Building Supplies	637.7	-8.2%	14.6%	5.7%
 Books & Stationery Stores	144.7	-20.4%	-3.8%	1.3%
 Liquor Stores	264.6	-16.2%	7.6%	2.4%
 Recreation & Entertainment	435.0	-4.6%	-1.5%	3.9%
 Supermarkets/Food Retailers	3,838.0	-5.5%	2.6%	34.3%
 Travel & Accommodation	766.4	0.4%	3.9%	6.8%
 TOTAL RETAIL SPEND	11,201.4	-6.0%	3.0%	100%

QUARTERLY RETAIL SPEND BY CATEGORY



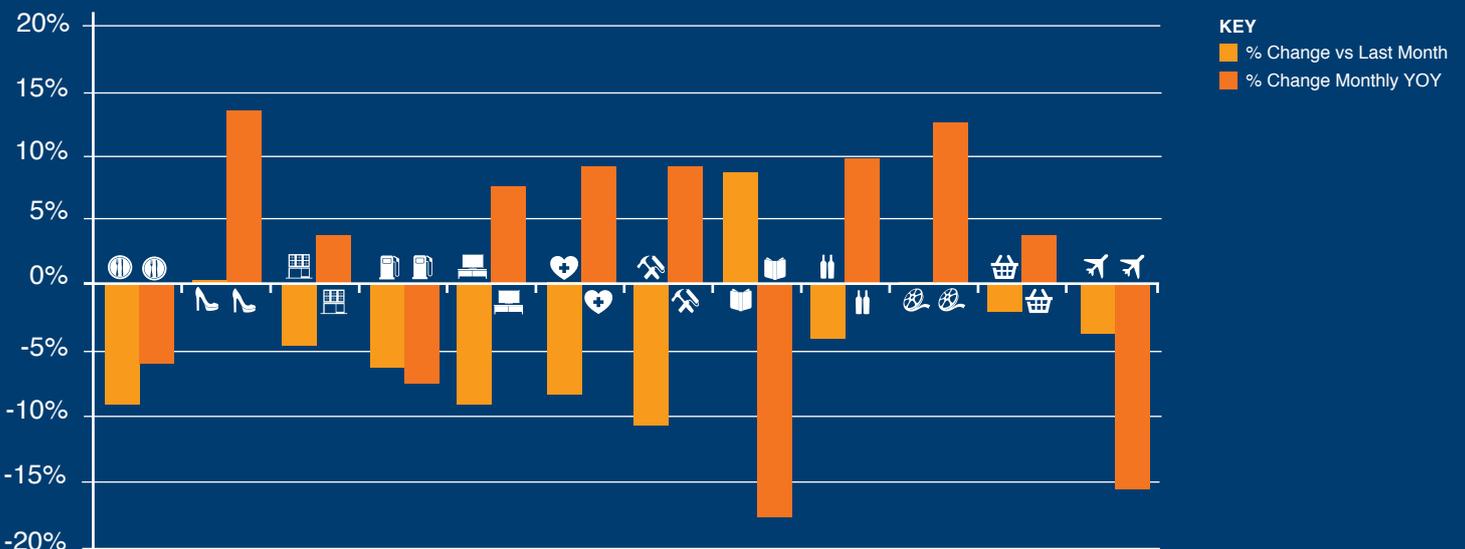
CHANGE VS LAST YEAR



SELECTED REGIONS OF INTEREST

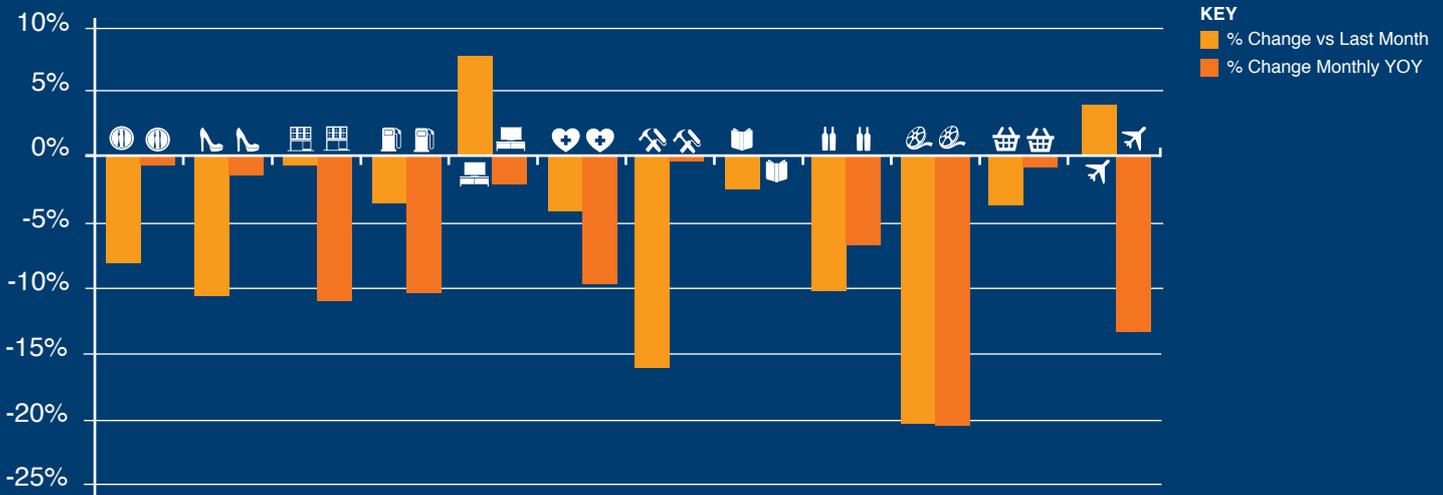
MONTHLY TRENDS - WEST COAST

The West Coast region saw month on month increases in Books & Stationery Stores (+8.9%) and Clothing & Footwear (+0.2%) categories. Decreases in spend when compared to the previous month were greatest in the Home & Building Supplies (-10.7%), Furniture/Appliances/Homewares (-9.0%), Café/Restaurants/Bars (-9.0%) and Health Goods & Services (-8.1%) categories. The region saw some increases in year on year spend that were greater than national increases. Clothing & Footwear (+13.6%), Recreation & Entertainment (+12.8%), Liquor Stores (+9.8%) and Home & Building Supplies (+9.2%) were the categories that saw the greatest increase in spend when compared to the same period last year. Decreases in year on year spend were greatest in the Books & Stationery Stores (-17.6%), Travel & Accommodation (-15.5%) and Fuel & Service Stations (-7.2%) categories.



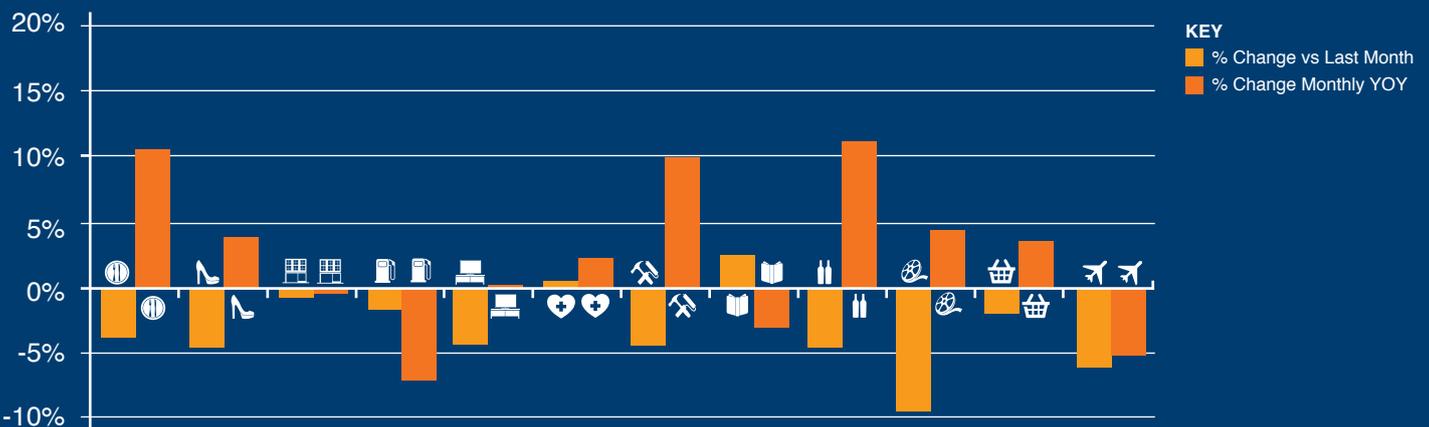
MONTHLY TRENDS - TARANAKI

Taranaki saw significant decreases in spend when compared to the previous month. The greatest decreases were in the Recreation & Entertainment (-20.9%), Home & Building Supplies (-16.0%), Clothing & Footwear (-10.4%) and Liquor Stores (-10.2%) categories. Month on month increases were seen in the Furniture/Appliances/Electronics (+7.9%) and Travel & Accommodation (+3.9%) categories, both of which saw a month on month decrease in spend at a national level. The Taranaki region also saw significant decreases in year on year spend with the greatest decreases in Recreation & Entertainment (-22.1%), Travel & Accommodation (-13.2%), Department Stores (-11.0%) and Fuel & Service Stations (-10.2%).



MONTHLY TRENDS - AUCKLAND

Auckland followed national trends with month on month increases in spend in the Health Goods & Services (+0.5%) and Books & Stationery Stores (+2.4%) categories. All other categories saw month on month decreases in spend. These decreases were led by Recreation & Entertainment (-9.4%), Travel & Accommodation (-6.1%), Clothing & Footwear (-4.6%) and Liquor Stores (-4.6%). The greatest increases in spend when compared to the same period last year were in the Liquor Stores (+11.1%), Café/Restaurants/Bars (+10.3%) and Home & Building Supplies (+9.9%). The only categories to see a year on year decrease in spend were Fuel & Service Stations (-7.1%), Travel & Accommodation (-5.1%) and Books & Stationery Stores (-3.0%).



Health Goods & Services saw the greatest increase in month on month spend (+1.5%)

Home & Building Supplies saw the greatest increase in monthly spend compared to the same last year (+6.9%)

Northland had the greatest increase in overall spend compared to the same period last year (+8.1%)

CATEGORIES UP THIS MONTH 2

REGIONS UP THIS MONTH 10

Recreation & Entertainment saw the greatest month on month decrease in spend (-13.0%)

Fuel & Service Stations saw the greatest decrease in spend when compared to the previous quarter (-5.3%)

The Taranaki region saw the greatest decrease in overall spend compared to the same period last year (-4.9%)

CATEGORIES DOWN THIS MONTH 10

REGIONS DOWN THIS MONTH 6

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

