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Retail Trade Survey: November 2009

Highlights

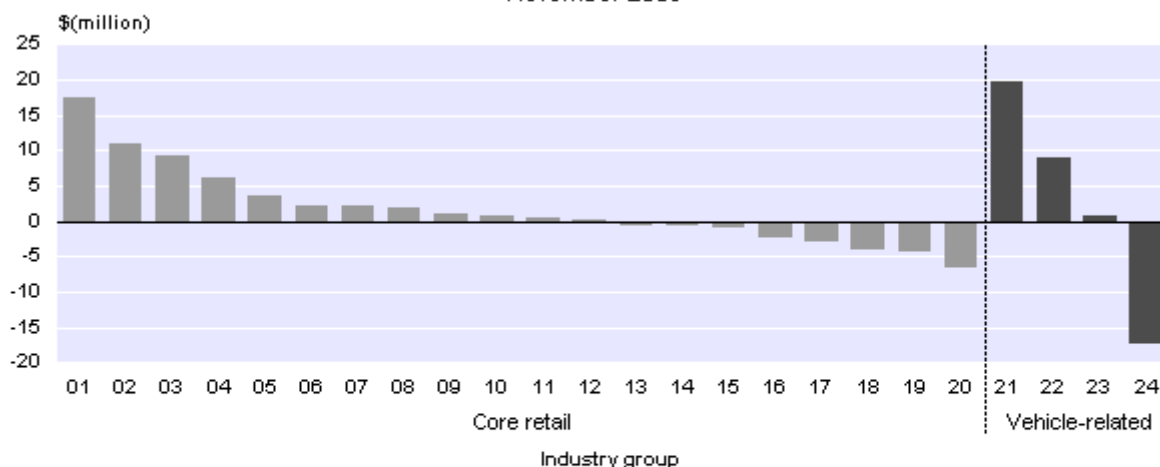
For November 2009 compared with October 2009 (on a seasonally adjusted basis):

- Total retail sales rose 0.8 percent (\$46 million).
- Core retail sales rose 0.8 percent (\$34 million).
- Automotive fuel retailing (up 3.8 percent or \$20 million) and 'other retailing' (up 7.3 percent or \$17 million) had the largest increases.
- The biggest decrease was in motor vehicle retailing (down 3.2 percent or \$17 million).

The total retail sales trend has risen 2.5 percent since February 2009.

Retail Industry Contributions to the Change in Seasonally Adjusted Sales

Change from previous month
November 2009



01 Other retailing	09 Bars and clubs	17 Chemist retailing
02 Department stores	10 Other food retailing	18 Furniture and floor coverings retailing
03 Liquor retailing	11 Other personal services	19 Accommodation
04 Clothing and softgoods retailing	12 Takeaway food retailing	20 Cafes and restaurants
05 Appliance retailing	13 Personal and household goods hiring	21 Automotive fuel retailing
06 Recreational goods retailing	14 Footwear retailing	22 Automotive electrical, smash repair, tyres
07 Supermarket and grocery stores	15 Household equipment repair services	23 Automotive repair and services nec
08 Hardware retailing	16 Fresh produce retailing	24 Motor vehicle retailing

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Commentary

All references to sales movements are to seasonally adjusted series unless otherwise stated.

November 2009

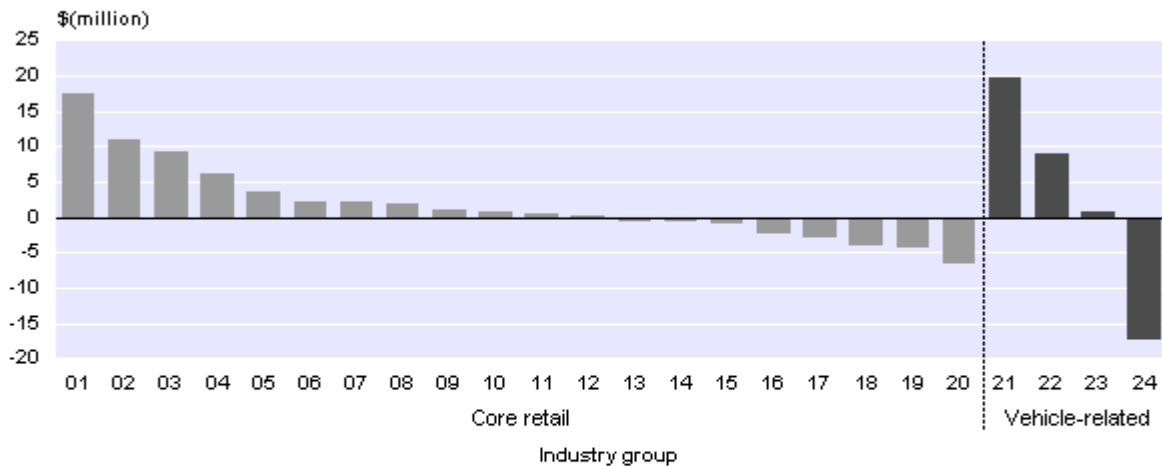
In November 2009, total retail sales were up 0.8 percent (\$46 million), following two months of flat results. The latest increase was led by automotive fuel retailing and the 'other retailing' industry. Core retail sales (which exclude the four vehicle-related industries) were also up 0.8 percent (\$34 million), following a 0.5 percent increase in October 2009. Twelve of the 20 core retail industries recorded increases.

Vehicle-related sales were up 0.9 percent, following a 1.1 percent drop in October 2009.

Retail Industry Contributions to the Change in Seasonally Adjusted Sales

Change from previous month

November 2009



- | | | |
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Overall, the largest increases were:

- automotive fuel retailing – up 3.8 percent (\$20 million)
- other retailing – up 7.3 percent (\$17 million)
- department stores – up 3.5 percent (\$11 million)
- liquor retailing – up 9.0 percent (\$9 million)
- automotive electrical, smash repairs, and tyres – up 8.0 percent (\$9 million)
- clothing and softgoods retailing – up 2.9 percent (\$6 million).

The largest decreases were:

- motor vehicle retailing – down 3.2 percent (\$17 million)

- cafes and restaurants – down 1.9 percent (\$7 million).

The rest of the retail industries moved up or down by less than \$5 million.

Sales trend

The total retail sales trend has been rising since February 2009 (up 2.5 percent), at an average rate of 0.3 percent per month. This followed a 3.3 percent fall between February 2008 and February 2009.

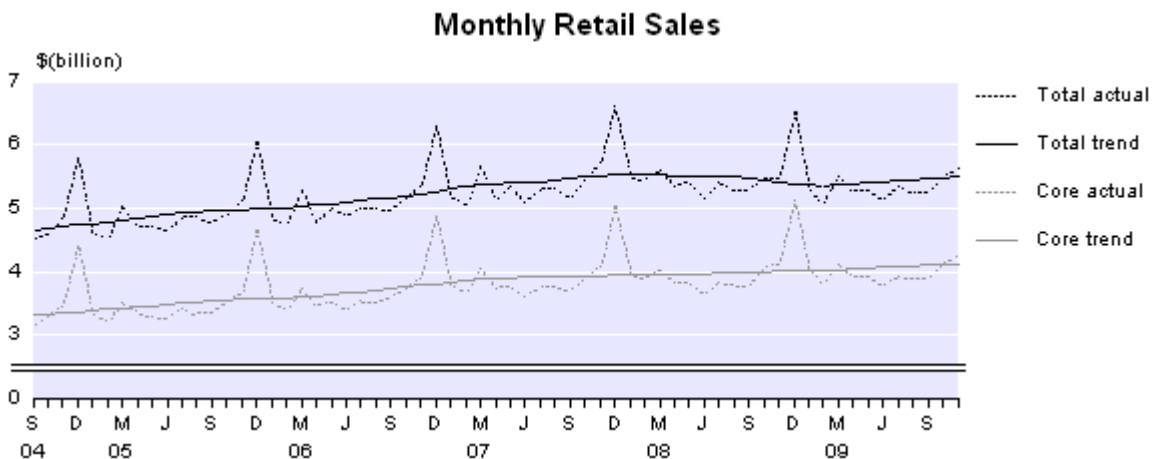
Since February 2009, the core retail trend has also increased at an average rate of 0.3 percent per month, compared with an average increase of 0.1 percent between April 2007 and February 2009.

Industries with trends currently showing strong or consistent rates of increase are:

- department stores – up 3.9 percent since June 2009
- bars and clubs – up 7.0 percent since June 2009
- cafes and restaurants – up 3.6 percent since July 2009
- personal and household goods hiring – up 6.8 percent since June 2009
- other personal services – up 3.7 percent since May 2009
- automotive fuel retailing – up 2.3 percent since July 2009.

Conversely, industries with trends currently showing strong or consistent rates of decrease are:

- fresh produce – down 9.1 percent since June 2009
- liquor retailing – down 1.7 percent since April 2009
- other food retailing – down 4.1 percent since July 2009
- footwear retailing – down 3.9 percent since April 2009.



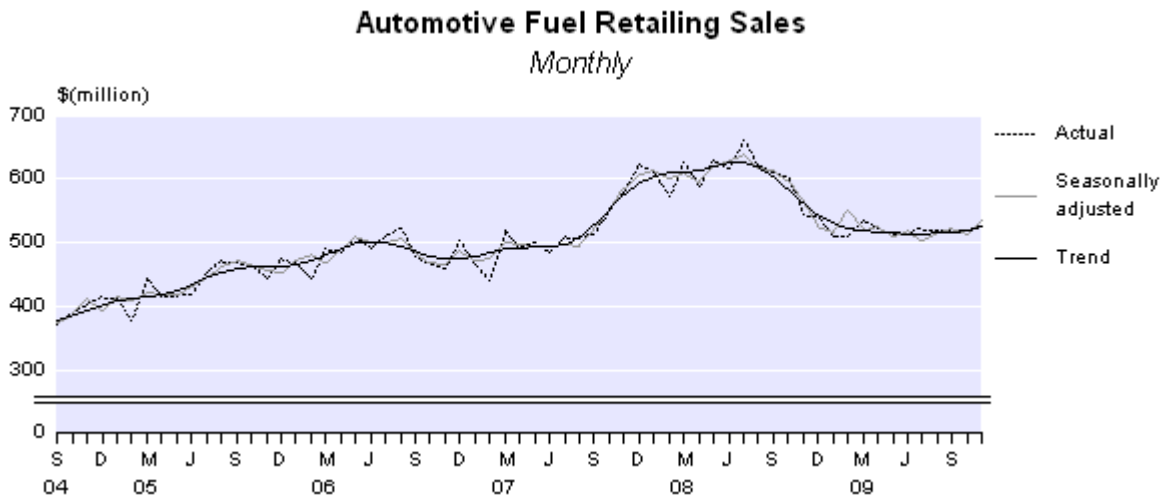
Vehicle-related industries

Automotive fuel retailing and the automotive electrical, smash repairs, and tyres industry had a \$29 million combined sales increase in November 2009. This was largely offset by a sales decrease of \$17 million in motor vehicle retailing. Automotive repair and services not elsewhere classified (nec) sales were flat.

Automotive fuel retailing

In November 2009, automotive fuel retailing was the largest contributor to increases in retail sales, with a 3.8 percent increase (\$20 million). Both petrol and diesel prices, which are not seasonally adjusted, were higher in November 2009 than in October 2009.

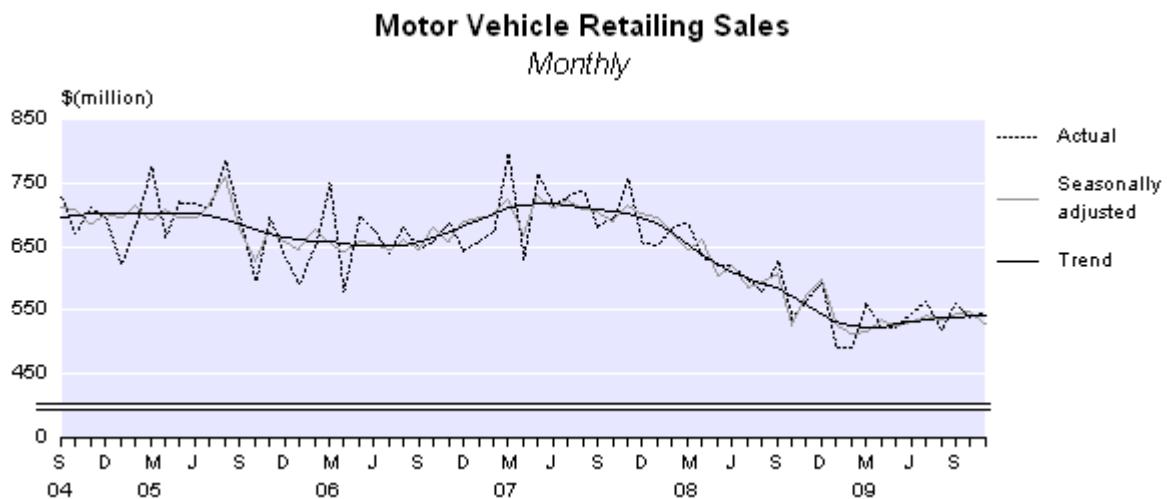
Figures indicate a turning point in the sales trend was reached in July 2009. Since then the trend has been increasing at an average of 0.6 percent per month. Prior to this, the trend fell 18.2 percent between August 2008 and July 2009.



Motor vehicle retailing

Motor vehicle retailing sales fell 3.2 percent (\$17 million) in November 2009, following a 0.8 percent increase in October. This was the largest fall recorded since January 2009, when sales fell 11.2 percent on the previous month.

The sales trend has been increasing since March 2009 (up 3.5 percent), but has eased recently. The current trend level is still down 24.7 percent since the series' peak in May 2007.



Movements in the other vehicle-related industries were:

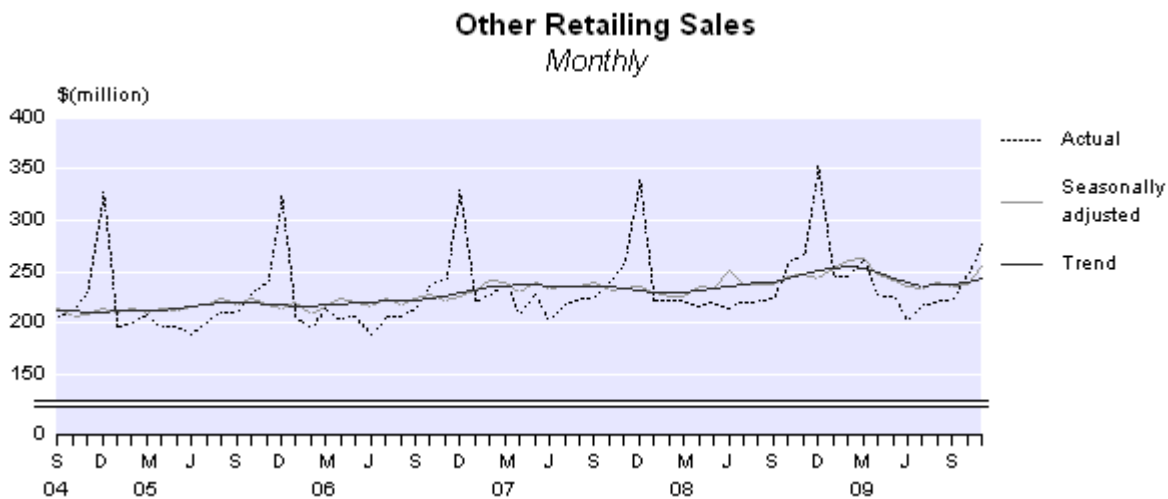
- Automotive electrical, smash repairs, and tyres – up 8.0 percent (\$9 million), following 7.0 percent and 1.8 percent decreases in October and September 2009 respectively. The trend has been rising since October 2008, but the rate of increase has been slowing in recent months.
- Automotive repair and services nec – sales were flat (up less than \$1 million). The sales trend reached a turning point in August 2009, with the level of the trend down 1.0 percent since then. Initial trend estimates should be used with caution as they may be revised as more data points become available.

Other retailing

Other retailing includes activities such as retailing antique and used goods, flowers, garden supplies, and watches and jewellery.

Other retailing was the second-largest contributor to the increase in retail sales, with a 7.3 percent increase (\$17 million) in November 2009. This is the largest increase since June 2008, when this industry recorded an 8.3 percent increase on the previous month.

The sales trend peaked in February 2009. Between March and July 2009 the trend fell 7.1 percent. Since then, it has risen 2.7 percent but is still 4.5 percent lower than when the series peaked.

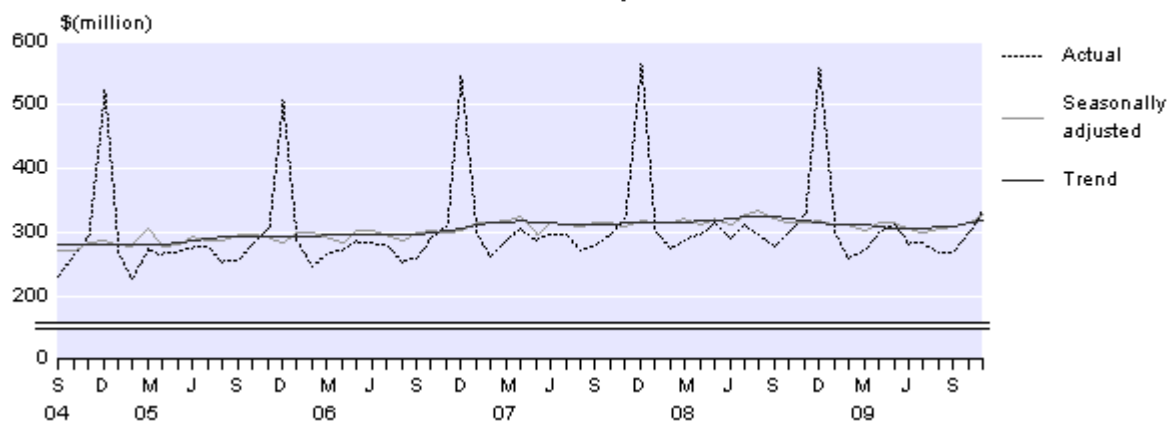


Department stores

Department stores recorded the third-largest increase in retail sales in November 2009, up 3.5 percent (\$11 million).

The trend fell 5.5 percent between September 2008 and June 2009. It reached a turning point in June 2009 and has been steadily increasing, at an average of 0.8 percent per month, since then. The trend is now at its highest level since October 2008.

Department Store Sales *Monthly*



Other industries

Cafes and restaurants

Cafes and restaurants recorded the second-largest decrease, down 1.9 percent (\$7 million), in November 2009. This followed a 9.5 percent (\$31 million) increase in October 2009.

The trend has risen 3.6 percent since July 2009, when it reached a turning point.

Supermarket and grocery stores

Supermarket and grocery stores, which account for a third of core retail sales, were flat, up just 0.2 percent (\$2 million) in November 2009, following a 1.1 percent fall in October.

The sales trend, which rose an average of 0.7 percent per month between July 2008 and June 2009, has flattened in the latest months.

Regional estimates

In November 2009, the value of seasonally adjusted sales was flat in the North Island (up just 0.2 percent) and rose in the South Island (up 1.8 percent). The only region with a sales decrease was Auckland, down 0.5 percent. Changes in sales were as follows:

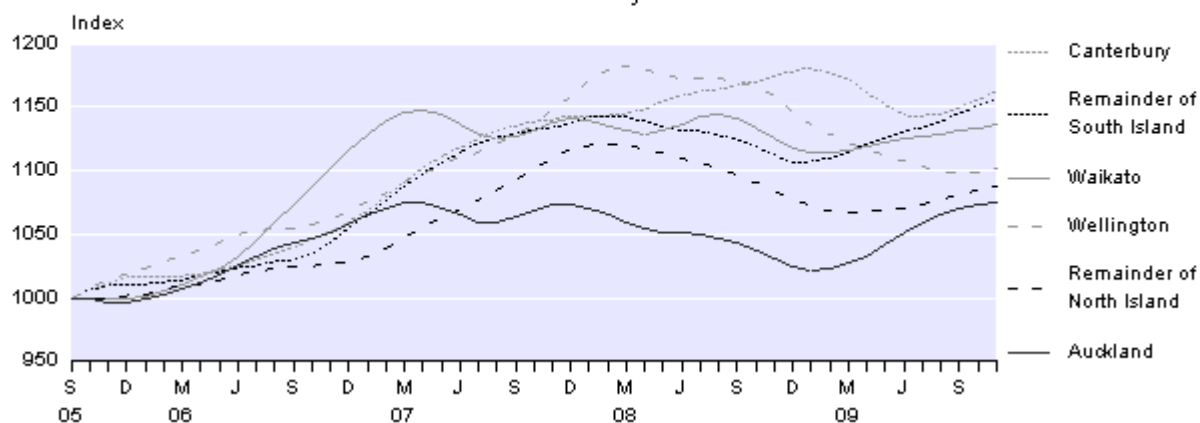
- Auckland – down 0.5 percent
- Waikato – up 0.7 percent
- Wellington – up 1.5 percent
- Remainder of the North Island – up 0.3 percent
- Canterbury – up 1.4 percent
- Remainder of the South Island – up 2.3 percent.

The sales trend has been rising in the North Island since February 2009 (up 2.6 percent), and in the South Island since June 2009 (up 1.9 percent). In the South Island the rate of increase appears to be strengthening.

Indexed Retail Sales Trend by Geographical Region

Base: September 2005 (=1000)

Monthly



Illustrated in the graph above, the regional sales trends are as follows:

- Auckland – the trend has been rising, up 5.1 percent since January 2009. However, the rate of increase has slowed in the latest months.
- Waikato – the trend has been rising, up 2.1 percent since February 2009.
- Wellington – the trend is down 6.1 percent since August 2008, but has flattened in the latest months.
- Remainder of the North Island – the trend has been rising, up 2.0 percent since April 2009.
- Canterbury – the trend has been rising, up 1.7 percent since July 2009.
- Remainder of the South Island – the trend has been rising since January 2009, up 4.5 percent.

Revisions

There were no revisions to the Retail Trade Survey in the November 2009 month.

Comparison statistics

For November 2009 compared with October 2009:

- The food price index fell 0.3 percent.
- New registrations of cars and station wagons (including vehicles previously registered overseas) rose 9.1 percent.
- Seasonally adjusted short-term overseas visitor arrivals fell 3.7 percent.
- As first published (on 9 December 2009), the seasonally adjusted value of the retail Electronic Card Transaction (ECT) series rose 0.7 percent, and the seasonally adjusted value of the core retail ECT series rose 0.3 percent.

Other:

- The Reserve Bank of New Zealand's Official Cash Rate was unchanged at 2.50 percent throughout November 2009.

Measurement errors

All statistical estimates are subject to measurement errors. These include both sample errors and non-sample errors. In addition, the survey applies imputation methodologies to cope with small firms and non-response. These measurement errors should be considered when analysing the results from the survey. For more information on measurement errors, please refer to the 'Technical notes' of this release.

Sample errors

The postal survey was designed to give statistics at the following levels of accuracy (at the 95 percent confidence interval limit):

- 2 percent for sales at the total national retail trade level
- 10 percent for sales at the published national retail industry level.

This means, for example, that there is a 95 percent chance that the true value of total retail trade sales lies within 2 percent of the published estimate

At the industry level, the following sample errors occurred in the November 2009 month (at the 95 percent confidence interval limit):

Retail Trade Survey: November 2009 Month Sample Errors by Industry <i>At the 95 percent confidence interval limit</i>		
Retail industry	Level (relative percent)	Movement (absolute percent)
Supermarket and grocery stores	3.8	0.4
Fresh meat, fish, poultry, fruit, and vegetables	8.1	4.9
Liquor retailing	8.5	1.1
Other food retailing	9.8	5.5
Takeaway food retailing	5.6	3.8
Department stores	0.0	0.0
Furniture and floor coverings	8.1	5.5
Hardware	5.6	2.1
Appliance retailing	10.4	1.6
Recreational goods	10.1	6.4
Clothing and softgoods	6.1	3.3
Footwear	10.3	2.3
Chemist	5.4	1.1
Household equipment repair services	13.6	4.7
Other retailing	6.8	2.0
Motor vehicle retailing	9.4	3.6
Automotive fuel retailing	3.6	0.9
Automotive electrical services, smash repairing, tyre retailing	4.7	3.7
Automotive repair and services, nec	7.3	2.8
Accommodation	4.9	2.9
Bars and clubs	9.6	3.5
Cafes and restaurants	5.9	2.4
Personal and household goods hiring	15.0	4.3
Other personal services	6.1	1.7
Total retail trade	1.6	1.6
Note: nec = not elsewhere classified		

Industries with zero sample error are full-coverage industries. In these industries, all large firms are surveyed and all small to medium-sized firms are modelled using administrative data sourced from Inland Revenue.

Retail Trade Survey: November 2009 Month Sample Errors by Region
At the 95 percent confidence interval limit

Region	Level (relative percent)	Movement (absolute percent)
Auckland	3.6	0.9
Waikato	10.2	1.0
Wellington	5.2	1.6
Remainder of the North Island	5.5	1.2
Canterbury	7.4	1.2
Remainder of the South Island	7.8	2.5

Imputation

Small firms

Small to medium-sized firms are generally not surveyed. Their variables are instead modelled from administrative data (GST) sourced from Inland Revenue. Ratios calculated from the postal sample units are applied to the administrative data to provide an estimate of their variables.

Non-response imputation

Although every attempt is made to achieve a 100 percent response rate, in practice this does not occur. Values for non-responding businesses are estimated by a number of methods, including:

- regression imputation
- historic imputation
- mean imputation.

Regression imputation involves estimating sales from the unit's administrative data (GST sales) based on the relationship shown by similar businesses. Historic imputation involves multiplying their response in the previous period by a non-response factor. The non-response factor is the average movement of similar businesses over the month. Mean imputation involves estimating a value for a unit by using the average value for a set of similar businesses.

Postal response rate

The response rate describes the proportion of geographic units that provided survey responses. Note that the calculation of this response rate relates only to data for the postal sample. The Retail Trade Survey has a target response rate of 85 percent. The response rate achieved for the November 2009 survey was 90 percent.

The table below indicates the percentage of sales imputed in the November 2009 month:

Sales Imputed in the November 2009 Month		
Retail industry	Tax modelled	Non-response
	Percentage of sales	
Supermarket and grocery stores	5.3	6.9
Fresh meat, fish, poultry, fruit, and vegetables	7.8	16.0
Liquor retailing	8.7	14.0
Other food retailing	9.7	16.4
Takeaway food retailing	8.4	16.5
Department stores	0.0	0.0
Furniture and floor coverings	11.9	10.5
Hardware	7.2	4.9
Appliance retailing	7.2	3.8
Recreational goods	8.0	11.7
Clothing and softgoods	8.7	5.8
Footwear	8.6	8.9
Chemist	4.2	7.8
Household equipment repair services	9.2	12.4
Other retailing	12.5	13.9
Motor vehicle retailing	10.7	7.5
Automotive fuel retailing	2.6	6.8
Automotive electrical services, smash repairing, tyre retailing	8.9	11.8
Automotive repair and services, nec	10.2	14.2
Accommodation	11.4	12.9
Bars and clubs	10.2	8.9
Cafes and restaurants	10.1	13.1
Personal and household goods hiring	11.5	9.7
Other personal services	15.7	14.5
Total retail trade	7.5	8.8
Note: nec = not elsewhere classified		

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Next release ...

Retail Trade Survey: December 2009 quarter will be released on 12 February 2010.

Technical notes

Background to the survey

The Retail Trade Survey (RTS) is designed to provide short-term economic indicators of the retail trade sector. In addition, the data is used for the compilation of the retail trade sector component of quarterly national accounts (on the production side) and in the compilation of household consumption expenditure (on the expenditure side). The survey was last redesigned for the September 2003 quarter. For more details about the redesign refer to [Retail Trade Survey – Redesign: September 2003](#) and the [Retail Trade Survey – Survey design information paper](#).

Population

The target population for this survey is all geographic units (GEOs) operating in New Zealand that are classified on Statistics New Zealand's Business Frame to the Australian and New Zealand Standard Industrial Classification (ANZSIC96) below:

- Retail trade (ANZSIC division G)
- Accommodation, cafes and restaurants (ANZSIC division H)
- Personal services (ANZSIC subdivision 95 of division Q).

Only enterprises with a turnover of \$30,000 or more are eligible for selection.

Industry descriptions

A geographic unit is included in an industry based on its predominant activity in terms of sales. For example, a footwear store will sell shoes and boots, but it may also sell bags and other accessories. The store will be classified to the footwear industry if most of its sales income comes from the sale of shoes and boots. The 24 industries are defined as follows:

Retail Trade Survey Industry Descriptions	
Industry	ANZSIC96 code
G0111 Supermarket and grocery stores	G511010 Supermarkets
	G511020 Groceries and dairies
G0121 Fresh meat, fish, poultry, fruit, and vegetable retailing	G512100 Fresh meat, fish, and poultry retailing
	G512200 Fruit and vegetable retailing
G0122 Liquor retailing	G512300 Liquor retailing
G0123 Other food retailing	G512400 Bread and cake retailing
	G512600 Milk vending
	G512900 Specialised food retailing nec

Industry	ANZSIC96 code
G0124 Takeaway food retailing	G512510 Fish and chips, hamburger and ethnic food, takeaway stores
	G512520 Chicken takeaway stores
	G512530 Ice-cream parlours and mobile ice-cream vendors
	G512540 Pizza takeaway stores
	G512590 Other takeaway food stores (including sandwiches and savouries) nec
G0131 Department stores	G521000 Department stores
G0141 Furniture and floor coverings retailing	G523100 Furniture retailing
	G523200 Floor covering retailing
G0142 Hardware retailing	G523300 Domestic hardware and houseware retailing
G0143 Appliance retailing	G523400 Domestic appliance retailing
	G523500 Recorded music retailing
G0144 Recreational goods retailing	G524100 Sport and camping equipment retailing
	G524200 Toy and game retailing
	G524300 Newspaper, book, and stationery retailing
	G524400 Photographic equipment retailing
	G524500 Marine equipment retailing
G0151 Clothing and softgoods retailing	G522100 Clothing retailing
	G522300 Fabrics and other soft good retailing
G0152 Footwear retailing	G522200 Footwear retailing
G0153 Chemist retailing	G525100 Pharmaceutical, cosmetic, and toiletry retailing
G0154 Household equipment repair services	G526100 Household equipment repair services (electrical)
	G526900 Household equipment repair services nec
G0159 Other retailing	G525200 Antique and used good retailing
	G525300 Garden supplies retailing
	G525400 Flower retailing
	G525500 Watch and jewellery retailing
	G525900 Retailing nec

Industry	ANZSIC96 code
G0161 Motor vehicle retailing	G531100 Car retailing
	G531200 Motor cycle dealing
	G531300 Trailer and caravan dealing
G0162 Automotive fuel retailing	G532100 Automotive fuel retailing
G0163 Automotive electrical services, smash repairing, and tyre retailing	G532200 Automotive electrical services
	G532300 Smash repairing
	G532400 Tyre retailing
G0164 Automotive repair and services nec	G532900 Automotive repair and services nec
H0111 Accommodation	H571010 Hotels (accommodation)
	H571020 Motels and motor inns
	H571030 Hosted accommodation
	H571040 Backpacker and youth hostels
	H571050 Caravan parks and camping grounds
	H571090 Accommodation nec
H0121 Bars and clubs	H572000 Pubs, taverns, and bars
	H574000 Clubs (hospitality)
H0122 Cafes and restaurants	H573000 Cafes and restaurants
Q0111 Personal and household goods hiring	Q951100 Video hire outlets
	Q951900 Personal and household goods hiring nec
Q0112 Other personal services	Q952100 Laundries and dry-cleaners
	Q952200 Photographic film processing
	Q952300 Photographic studios
	Q952400 Funeral directors, crematoria, and cemeteries
	Q952500 Gardening services
	Q952600 Hairdressing and beauty salons
	Q952900 Personal services nec
Note: nec = not elsewhere classified	

Sample design

The survey population is stratified according to:

- industries defined by the ANZSIC-based ANZIND classification at the inter-industry level
- size (in terms of rolling-mean employment)
- turnover (annualised GST sales).

Each ANZIND inter-industry contains between two and four substrata. Because of the contribution that large units make to the economic activity within each industry, they are all included in the sample. A portion of the remaining medium to large units is also included in the sample. In addition, small to medium-sized businesses have their data modelled from administrative data (GST) sourced from Inland Revenue. The Inland Revenue data have been

forecast two to three months ahead. All retailing GEOs belonging to a selected 'enterprise' are included.

There are approximately 70,000 retail outlets in New Zealand. Around 3,500 enterprises (between 9,000 and 10,000 GEOs) have been selected in the RTS postal sample. The postal sample is supplemented by GST data representing smaller retailers, approximately 36,200 enterprises (36,600 GEOs).

Sample maintenance

Sample maintenance is the process that maintains the sample over time, to reflect 'births', 'deaths' and other structural changes identified on the Business Frame. The information for Business Frame changes can be from a variety of sources, including GST registrations and respondent contact.

New enterprises are identified when they register for GST. Once a month, the new enterprises are selected into the sample using the same criteria as for the original sample. These are referred to as births. When an enterprise ceases trading, its retailing GEOs are removed from the survey. These are referred to as deaths.

Enterprises can also enter or leave the survey sample if they are reclassified to a different industry. Reclassifications occur when an enterprise changes its main form of activity (eg from wholesale trade to retailing). These are usually identified in the Annual Frame Update Survey conducted in February of each year.

Sample reselection

The sample for the RTS is reselected each month to ensure the sample reflects changes occurring in the retailing population.

Measurement errors

Errors in the survey are divided into two classes:

Non-sampling error

Non-sampling error includes errors arising from biases in the patterns of response and non-response, inaccuracies in reporting by respondents, and errors in the recording and coding of data. The size of these errors is difficult to quantify. Statistics may be revised if significant errors are detected in subsequent quarters.

Sampling error

Sampling error is a measure of the variability that occurs by chance because a sample, rather than an entire population, is surveyed.

Definitions

ANZSIC96

Australian and New Zealand Standard Industrial Classification system – New Zealand version 1996.

ANZIND

An ANZSIC-based classification used to group industries for publication.

Business Frame

A register of all economically significant businesses operating in New Zealand. The population of the RTS is drawn from the Business Frame.

Deflators

Deflators are indexes that measure the rate of price change of goods and services sold by each RTS industry. Deflators are not calculated for the subtotal or all industries total. For information on how deflators are calculated follow the [link](#) from the technical notes of this release on the Statistics NZ website.

Enterprise

An enterprise is a business entity operating in New Zealand, either as a legally constituted body such as a company, partnership, trust, local or central government trading organisation, or a self-employed individual.

Geographic unit

A geographic unit is a subdivision of an enterprise. It is a separate operating unit engaged in New Zealand in one, or predominantly one, kind of economic activity from a single physical location or base.

Per head of population

The population measure used for the RTS is the estimated residential population. It excludes short-term visitors to New Zealand.

Sales volumes expressed in September 1995 quarter prices

A constant price estimate, from which the portion of the current price sales' movement caused by price changes has been removed.

Use of retail trade data in quarterly national accounts

A key use of the RTS is in the calculation of retail trade value added for the compilation of quarterly gross domestic product (GDP).

The quarterly GDP retail trade indicator uses retail sales volumes expressed in September 1995 quarter prices, by industry series from the RTS. These series are chain-linked to give constant price sales at the ANZSIC96 working industry level. The chain-linking weights are calculated using annualised quarterly current prices sales by RTS industry.

Seasonally adjusted series

The X-12-ARIMA package has been used to produce the seasonally adjusted estimates and trend estimates for sales in all subdivisions. Seasonal adjustment aims to eliminate the impact of

regular seasonal events (such as annual cycles in agricultural production, winter, or annual holidays) on time series. This makes the data for adjacent months more comparable.

All seasonally adjusted figures are subject to revision each month. This enables the seasonal component to be better estimated and removed from the series.

Estimated trend

For any series, the survey estimates can be broken down into three components: trend, seasonal, and irregular. While seasonally adjusted series have had the seasonal component removed, trend series have had both the seasonal and the irregular components removed. Trend estimates reveal the underlying direction of movement in a series, and are likely to indicate turning points more accurately than are seasonally adjusted estimates.

The trend series are calculated using the X-12-ARIMA seasonal adjustment package. They are based on a five-term or a seven-term moving average of the seasonally adjusted series, with an adjustment for outlying values.

Trend estimates towards the end of the series incorporate new data as they become available and can therefore change as more observations are added to the series. Revisions can be particularly large if an observation is treated as an outlier in one month, but is found to be part of the underlying trend as further observations are added to the series. Typically, only the estimates for the most recent month will be subject to substantial revisions.

Regional estimates

In the October 2003 month, the RTS sample of geographic units changed. Data prior to the October 2003 month is an analytical back series, which has been derived to preserve industry movements at the national level. However, previously published regional movements may not have been preserved. Care should be taken when interpreting movements of regional series around the period of the redesign.

More information

For more information, follow the [link](#) from the technical notes of this release on the Statistics NZ website.

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Tables

The following tables are printed with this Hot Off the Press and can also be downloaded from the Statistics New Zealand website in Excel format. If you do not have access to Excel, you may use the [Excel file viewer](#) to view, print, and export the contents of the file.

1. Actual retail sales by month, by industry
2. Seasonally adjusted retail sales by month, by industry
3. Retail sales trend by month, by industry
4. Actual retail sales by geographical region
5. Actual retail sales by geographical region, excluding motor vehicle retailing
6. Seasonally adjusted retail sales by geographical region
7. Retail sales trend by geographical region