



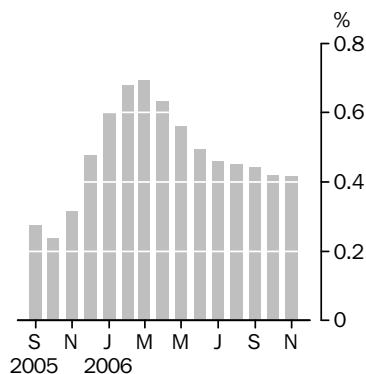
RETAIL TRADE

AUSTRALIA

EMBARGO: 11.30AM (CANBERRA TIME) TUES 9 JAN 2007

Monthly turnover

Trend estimates
% change



KEY FIGURES

	Nov 06 \$m	Oct 06 to Nov 06 % change
Turnover at current prices		
Trend estimates	18 410.6	0.4
Seasonally adjusted estimates	18 411.0	0.2

KEY POINTS

TREND ESTIMATES

- The trend estimate of turnover for the Australian Retail and Hospitality/Services series increased by 0.4% in November 2006. This follows increases of 0.4% in both October and September 2006.
- In November 2006, all states and territories had an increase in the trend estimate, except Northern Territory which was flat. The largest increases occurred in the Australian Capital Territory (+1.0%) and Western Australia (+0.9%).

SEASONALLY ADJUSTED ESTIMATES

- The seasonally adjusted estimate of turnover for the Australian Retail and Hospitality/Services series increased by 0.2% in November 2006. This follows a revised increase of 0.9% in October 2006 and an increase of 0.3% in September 2006.
- All states and territories had increases in the seasonally adjusted estimate, except New South Wales and South Australia which were flat. The largest increase occurred in the Australian Capital Territory (+0.8%).

ORIGINAL ESTIMATES

- In original terms, Australian turnover increased by 3.4% in November 2006 compared with October 2006. Chains and other large retailers (which are completely enumerated) increased by 4.3%, while the estimate for 'smaller' retailers (the sampled units) increased by 2.2%.
- Australian turnover increased by 7.2% in November 2006 compared with November 2005. Chains and other large retailers increased by 7.4%, while 'smaller' retailers increased by 7.0%.

INQUIRIES

For further information about these and related statistics, contact the National Information and Referral Service on 1300 135 070 or Jeremy Walker on Canberra (02) 6252 5451.

NOTES

FORTHCOMING ISSUES

<i>ISSUE</i>	<i>RELEASE DATE</i>
December 2006	5 February 2007
January 2007	2 March 2007
February 2007	2 April 2007
March 2007	8 May 2007
April 2007	30 May 2007
May 2007	3 July 2007

REVISIONS

There have been revisions to Food retailing, Queensland, for October 2006.

CHANGES IN THIS ISSUE

An improved "two-dimensional reconciliation" methodology has been used in the seasonal adjustment process, and is being implemented from this November 2006 issue. This results in additivity between high level (national, state, and industry total) seasonally adjusted series and aggregates of lower-level (state by industry) seasonally adjusted series. This has resulted in historic revisions. See paragraph 27 of the explanatory notes for more detail.

SAMPLING ERRORS

Standard errors for the Australian estimates (original data) for November 2006 contained in this publication are:

<i>Data Series</i>	<i>Estimate</i>	<i>Standard error</i>
Level of retail turnover (\$m)	19 218.8	138.1
Change from preceding month (\$m)	626.4	63.8
% change from preceding month (%)	3.4	0.3

For more information see the Explanatory Notes, paragraphs 34–38.

ABBREVIATIONS

ABN	Australian Business Number
ABS	Australian Bureau of Statistics
ANZSIC	Australian and New Zealand Standard Industrial Classification
ARIMA	autoregressive integrated moving average
ATO	Australian Taxation Office
n.e.c.	not elsewhere classified
PAYGW	pay-as-you-go withholding
RSE	relative standard error
TAU	type of activity unit

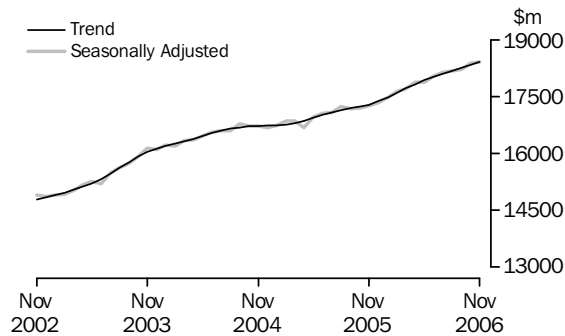
Susan Linacre
Acting Australian Statistician

INDUSTRY TRENDS

MONTHLY SEASONALLY ADJUSTED AND TREND ESTIMATES

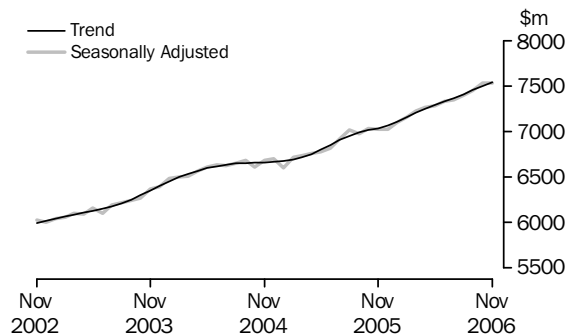
TOTAL RETAIL

There has been 12 months of moderate trend growth. Food retailing (12 months), Household good retailing (three months) and Clothing and soft good retailing (three months) have had moderate trend growth. Department stores (five months) and Other retailing (two months) have been in decline. Hospitality and services has had seven months of weak trend growth.



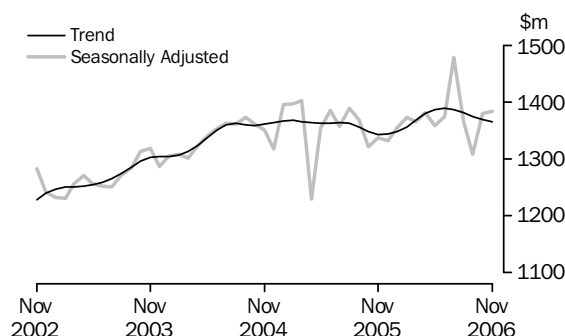
FOOD RETAILING

There has been moderate trend growth since December 2005. Victoria has had moderate growth for seven months, Western Australia has had four months of moderate growth and Queensland had moderate growth in October and November 2006. South Australia (six months) and the Northern Territory (ten months) have had strong trend growth. New South Wales has had mostly weak growth for the last eight months.



DEPARTMENT STORES

The trend for Department stores has been in decline for the last five months. All published states, except Western Australia, were in decline in November. These states have been in decline for at least four months.

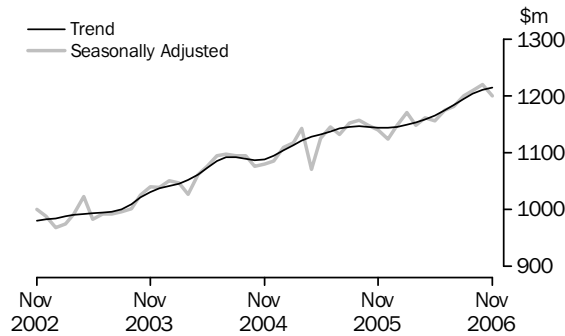


INDUSTRY TRENDS *continued*

MONTHLY SEASONALLY ADJUSTED AND TREND ESTIMATES

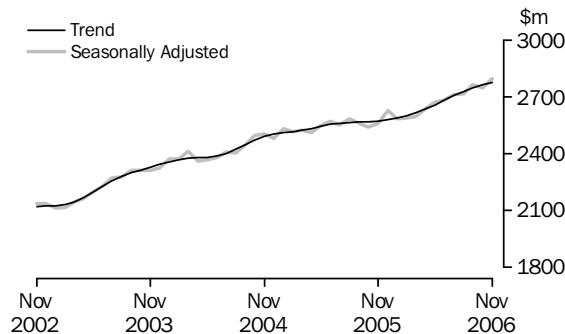
**CLOTHING AND SOFT
GOOD RETAILING**

The trend growth has been moderate for three months. Western Australia has had strong trend growth for 14 months and New South Wales, Victoria and Tasmania have been strong for five months. However, the Australian Capital Territory and Queensland have been in decline for seven and five months respectively.



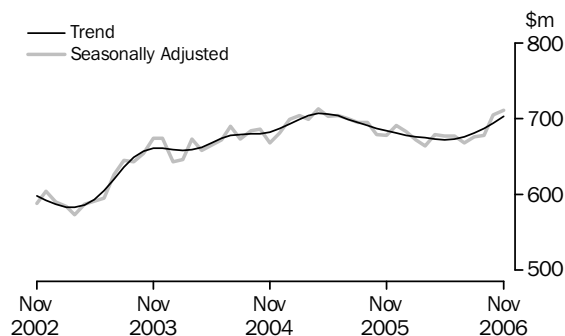
**HOUSEHOLD GOOD
RETAILING**

There has been moderate trend growth for the last three months. Queensland (seven months), South Australia (nine months), and the Australian Capital Territory (15 months) have all had strong trend growth. Victoria has had moderate trend growth in the last three months following five months of strong growth, while New South Wales had moderate growth in November 2006 following a period of weak growth.



**RECREATIONAL GOOD
RETAILING**

The trend growth has been strong for the last three months. Queensland (five months), Western Australia (five months), Tasmania (six months), the Northern Territory (three months) and the Australian Capital Territory (three months) have had strong growth. South Australia has been in decline for eight months, while Victoria has strengthened to moderate growth after a long period of decline.

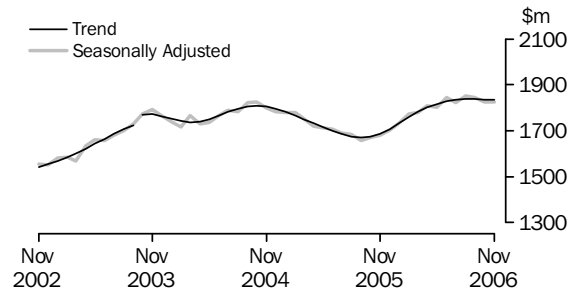


INDUSTRY TRENDS *continued*

MONTHLY SEASONALLY ADJUSTED AND TREND ESTIMATES

OTHER RETAILING

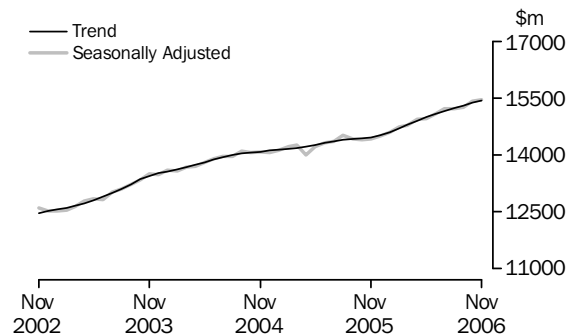
The trend was in decline for October and November 2006. New South Wales (three months), Queensland (five months) and the Australian Capital Territory (two months) have been in decline. By contrast, Western Australia has had 12 months of strong trend growth.



(a) Break in trend series from October 2003.

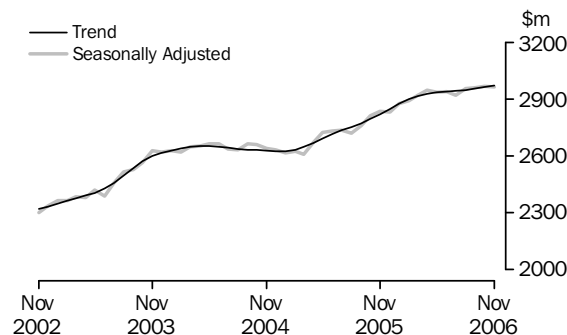
TOTAL RETAIL (EXCLUDING HOSPITALITY AND SERVICES)

Total retail (excluding Hospitality and services) has had moderate trend growth for seven months. Over this seven month period, the trend growth for Total retail (excluding Hospitality and services) has been mostly the same as Total industries (including Hospitality and services).



HOSPITALITY AND SERVICES

There has been weak trend growth for seven months. New South Wales was flat in November 2006 after two months of weak trend growth. Western Australia had moderate growth in November after ten months of strong growth. The Australian Capital Territory has had 11 months of strong trend growth, while Victoria and South Australia have been in decline for at least six months.

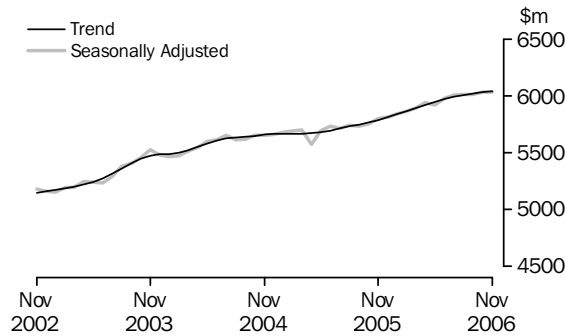


STATE TRENDS

MONTHLY SEASONALLY ADJUSTED AND TREND ESTIMATES

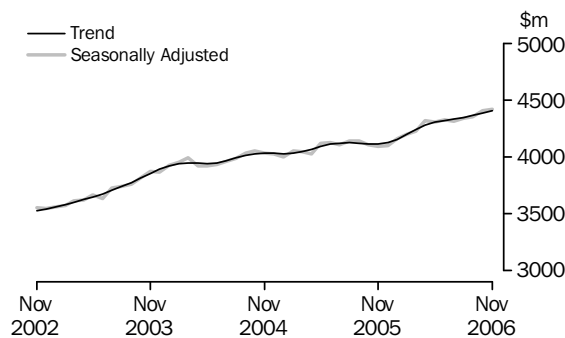
NEW SOUTH WALES

There has been weak trend growth for five months. Food retailing had weak trend growth in the last three months and Hospitality and services was flat in November 2006 after two months of weak growth. Clothing and soft good retailing has had strong growth for five months while Department stores has been in decline for five months.



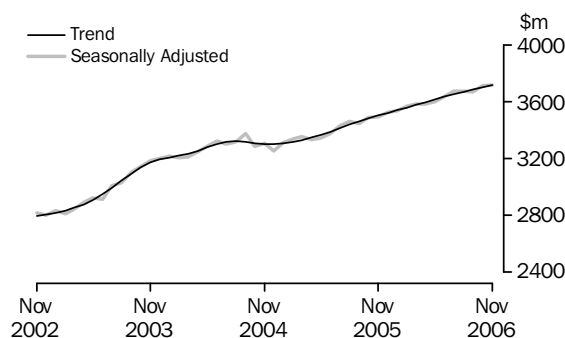
VICTORIA

There has been moderate trend growth for three months. Food retailing (seven months) and Household good retailing (three months) have had moderate growth. Recreational good retailing had moderate growth in November following a long period of being in decline. Clothing and soft good retailing has had five months of strong trend growth.



QUEENSLAND

Queensland had weak trend growth in November 2006 after 14 months of moderate growth. Food retailing had moderate growth in October and November 2006 following seven months of strong trend growth. Hospitality and services also had moderate growth in the last two months. Household good retailing and Recreational good retailing have had strong growth for seven and five months respectively. The other industries have been in decline for at least four months.

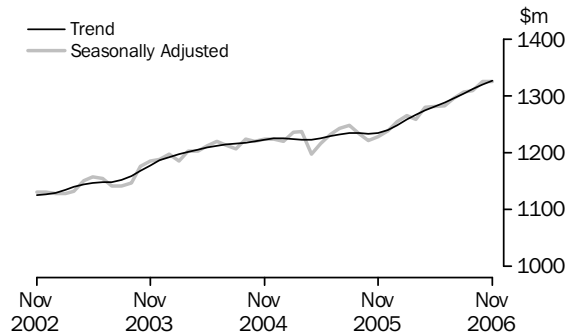


STATE TRENDS *continued*

MONTHLY SEASONALLY ADJUSTED AND TREND ESTIMATES

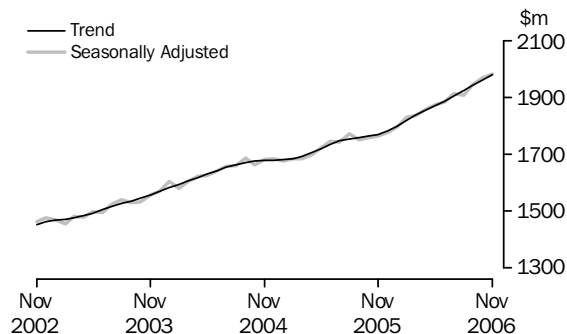
SOUTH AUSTRALIA

The trend growth has been moderate for nine months. Food retailing (six months) and Household good retailing (nine months) have had strong trend growth. Other retailing has had three months of moderate growth. Department stores, Recreational good retailing and Hospitality and services have been in decline for at least seven months.



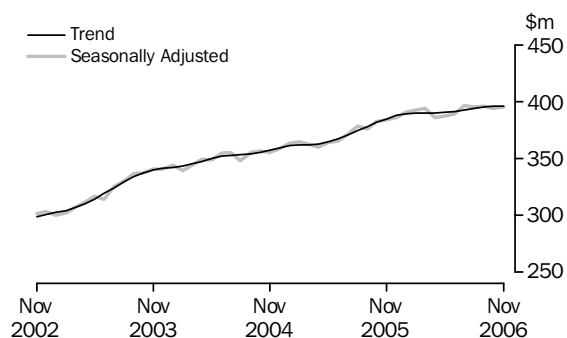
WESTERN AUSTRALIA

The trend growth has been strong for 11 months. Clothing and soft good retailing (14 months), Other retailing (12 months) and Recreational good retailing (five months) have had strong trend growth. Hospitality and services had moderate trend growth in November 2006 after ten months of strong growth. Food retailing has had moderate trend growth for four months, while over the same period, Department stores has had weak growth.



TASMANIA

The trend growth has been weak for five of the last seven months. Food retailing was in decline in November 2006, while Household good retailing has been in decline for four months. Clothing and soft good retailing and Recreational good retailing have had strong trend growth for five and six months respectively.



RETAIL TURNOVER, By Industry Group(a)

Month	Food retailing	Department stores	Clothing and soft good retailing	Household good retailing	Recreational good retailing	Other retailing	Hospitality and services	Total
ORIGINAL (\$ million)								
2005								
September	6 890.8	1 255.4	1 134.0	2 513.0	669.7	1 623.0	2 730.5	16 816.4
October	7 109.7	1 285.5	1 182.3	2 598.9	652.5	1 693.9	2 909.0	17 431.7
November	7 062.3	1 513.0	1 181.7	2 735.1	699.5	1 822.7	2 906.2	17 920.6
December	8 178.8	2 486.3	1 631.4	3 418.8	1 018.3	2 479.5	3 278.1	22 491.3
2006								
January	7 107.9	1 168.7	1 123.0	2 568.7	670.1	1 568.5	2 809.7	17 016.6
February	6 591.7	1 003.3	917.8	2 267.7	603.6	1 546.4	2 604.4	15 534.8
March	7 325.0	1 183.4	1 054.9	2 482.4	650.2	1 693.7	2 949.7	17 339.2
April	7 132.8	1 320.2	1 115.9	2 346.8	618.9	1 640.2	2 890.8	17 065.6
May	7 115.9	1 243.7	1 158.8	2 556.3	630.7	1 742.9	2 865.0	17 313.3
June	7 048.3	1 391.7	1 172.4	2 678.3	632.5	1 718.3	2 806.7	17 448.2
July	7 204.3	1 381.2	1 121.1	2 655.1	640.2	1 716.9	2 898.6	17 617.5
August	7 385.8	1 210.6	1 113.7	2 664.5	659.6	1 842.1	2 937.9	17 814.2
September	7 307.7	1 189.2	1 181.0	2 706.4	643.4	1 788.3	2 931.6	17 747.6
October	7 599.3	1 316.4	1 258.8	2 823.6	680.5	1 862.6	3 051.2	18 592.4
November	7 638.5	1 592.5	1 247.6	2 957.6	743.4	1 981.0	3 058.1	19 218.8
SEASONALLY ADJUSTED (\$ million)								
2005								
September	6 975.4	1 367.4	1 156.9	2 559.1	694.9	1 656.2	2 761.6	17 171.5
October	7 033.5	1 321.1	1 147.3	2 540.5	678.6	1 670.1	2 811.4	17 202.6
November	7 022.4	1 336.7	1 140.0	2 561.4	677.9	1 681.5	2 834.7	17 254.6
December	7 025.4	1 332.3	1 123.2	2 626.2	690.6	1 703.2	2 833.2	17 334.2
2006								
January	7 102.5	1 354.6	1 148.0	2 585.4	682.9	1 732.8	2 873.5	17 479.6
February	7 160.2	1 373.5	1 170.0	2 589.2	672.4	1 772.2	2 891.1	17 628.7
March	7 219.9	1 365.2	1 147.5	2 596.0	664.1	1 778.0	2 919.7	17 690.3
April	7 267.2	1 381.0	1 160.6	2 636.1	679.2	1 808.8	2 945.6	17 878.5
May	7 284.8	1 358.0	1 155.5	2 670.3	676.6	1 801.5	2 934.4	17 881.2
June	7 335.0	1 374.5	1 174.0	2 681.9	677.3	1 844.7	2 939.5	18 026.9
July	7 345.8	1 478.6	1 180.8	2 713.0	667.8	1 821.3	2 918.9	18 126.1
August	7 400.1	1 365.3	1 199.5	2 715.8	676.1	1 852.1	2 956.1	18 164.9
September	7 452.0	1 307.7	1 209.8	2 762.2	678.0	1 844.6	2 961.0	18 215.3
October	7 532.0	1 380.4	1 219.9	2 746.3	704.5	1 826.4	2 968.2	18 377.7
November	7 535.4	1 383.3	1 199.2	2 793.6	711.3	1 824.6	2 963.6	18 411.0
TREND ESTIMATES (\$ million)								
2005								
September	6 988.3	1 356.1	1 146.0	2 565.8	690.5	1 670.6	2 771.3	17 191.5
October	7 014.2	1 347.7	1 145.1	2 568.8	686.8	1 673.8	2 793.6	17 232.1
November	7 037.3	1 342.0	1 143.7	2 573.0	683.6	1 686.4	2 820.3	17 286.3
December	7 065.6	1 343.6	1 143.8	2 579.9	680.5	1 706.9	2 848.3	17 368.5
2006								
January	7 105.0	1 348.4	1 145.8	2 588.9	678.1	1 732.3	2 874.7	17 473.0
February	7 153.9	1 356.4	1 149.1	2 600.7	676.2	1 758.3	2 897.1	17 591.6
March	7 204.7	1 368.5	1 153.7	2 615.8	674.7	1 781.6	2 914.4	17 713.5
April	7 250.5	1 379.7	1 158.9	2 634.7	673.2	1 801.3	2 927.1	17 825.3
May	7 291.2	1 386.8	1 165.5	2 657.3	672.0	1 817.1	2 935.3	17 925.1
June	7 328.3	1 388.8	1 174.0	2 682.5	672.8	1 827.7	2 939.7	18 013.7
July	7 366.9	1 386.2	1 184.3	2 706.5	675.7	1 833.9	2 943.3	18 096.4
August	7 409.6	1 380.9	1 194.8	2 727.2	680.4	1 837.0	2 948.5	18 177.8
September	7 454.4	1 374.4	1 203.5	2 746.2	686.8	1 837.7	2 955.1	18 258.0
October	7 498.5	1 368.8	1 209.8	2 763.1	694.2	1 836.6	2 961.6	18 334.6
November	7 541.1	1 365.6	1 214.4	2 776.8	702.7	1 834.8	2 968.9	18 410.6

r revised

(a) See paragraph 5 of the Explanatory Notes.

RETAIL TURNOVER PERCENTAGE CHANGE, By Industry Group(a)

Month	Food retailing	Department stores	Clothing and soft good retailing	Household good retailing	Recreational good retailing	Other retailing	Hospitality and services	Total
ORIGINAL (% change from preceding month)								
2005								
September	0.0	5.6	8.1	-0.6	-0.7	-1.6	1.2	0.8
October	3.2	2.4	4.3	3.4	-2.6	4.4	6.5	3.7
November	-0.7	17.7	-0.1	5.2	7.2	7.6	-0.1	2.8
December	15.8	64.3	38.1	25.0	45.6	36.0	12.8	25.5
2006								
January	-13.1	-53.0	-31.2	-24.9	-34.2	-36.7	-14.3	-24.3
February	-7.3	-14.2	-18.3	-11.7	-9.9	-1.4	-7.3	-8.7
March	11.1	17.9	14.9	9.5	7.7	9.5	13.3	11.6
April	-2.6	11.6	5.8	-5.5	-4.8	-3.2	-2.0	-1.6
May	-0.2	-5.8	3.8	8.9	1.9	6.3	-0.9	1.5
June	-1.0	11.9	1.2	4.8	0.3	-1.4	-2.0	0.8
July	2.2	-0.8	-4.4	-0.9	1.2	-0.1	3.3	1.0
August	2.5	-12.4	-0.7	0.4	3.0	7.3	1.4	1.1
September	-1.1	-1.8	6.0	1.6	-2.5	-2.9	-0.2	-0.4
October	4.0	10.7	6.6	4.3	5.8	4.1	4.1	4.8
November	0.5	21.0	-0.9	4.7	9.2	6.4	0.2	3.4
SEASONALLY ADJUSTED (% change from preceding month)								
2005								
September	-0.5	-1.5	0.4	-1.0	0.0	-1.5	1.6	-0.4
October	0.8	-3.4	-0.8	-0.7	-2.3	0.8	1.8	0.2
November	-0.2	1.2	-0.6	0.8	-0.1	0.7	0.8	0.3
December	0.0	-0.3	-1.5	2.5	1.9	1.3	-0.1	0.5
2006								
January	1.1	1.7	2.2	-1.6	-1.1	1.7	1.4	0.8
February	0.8	1.4	1.9	0.1	-1.5	2.3	0.6	0.9
March	0.8	-0.6	-1.9	0.3	-1.2	0.3	1.0	0.3
April	0.7	1.2	1.1	1.5	2.3	1.7	0.9	1.1
May	0.2	-1.7	-0.4	1.3	-0.4	-0.4	-0.4	0.0
June	0.7	1.2	1.6	0.4	0.1	2.4	0.2	0.8
July	0.1	7.6	0.6	1.2	-1.4	-1.3	-0.7	0.6
August	0.7	-7.7	1.6	0.1	1.2	1.7	1.3	0.2
September	0.7	-4.2	0.9	1.7	0.3	-0.4	0.2	0.3
October	1.1	5.6	0.8	-0.6	3.9	-1.0	0.2	0.9
November	0.0	0.2	-1.7	1.7	1.0	-0.1	-0.2	0.2
TREND ESTIMATES (% change from preceding month)								
2005								
September	0.5	-0.4	0.1	0.1	-0.6	-0.3	0.7	0.3
October	0.4	-0.6	-0.1	0.1	-0.5	0.2	0.8	0.2
November	0.3	-0.4	-0.1	0.2	-0.5	0.8	1.0	0.3
December	0.4	0.1	0.0	0.3	-0.5	1.2	1.0	0.5
2006								
January	0.6	0.4	0.2	0.3	-0.4	1.5	0.9	0.6
February	0.7	0.6	0.3	0.5	-0.3	1.5	0.8	0.7
March	0.7	0.9	0.4	0.6	-0.2	1.3	0.6	0.7
April	0.6	0.8	0.4	0.7	-0.2	1.1	0.4	0.6
May	0.6	0.5	0.6	0.9	-0.2	0.9	0.3	0.6
June	0.5	0.1	0.7	0.9	0.1	0.6	0.2	0.5
July	0.5	-0.2	0.9	0.9	0.4	0.3	0.1	0.5
August	0.6	-0.4	0.9	0.8	0.7	0.2	0.2	0.4
September	0.6	-0.5	0.7	0.7	0.9	0.0	0.2	0.4
October	0.6	-0.4	0.5	0.6	1.1	-0.1	0.2	0.4
November	0.6	-0.2	0.4	0.5	1.2	-0.1	0.2	0.4

(a) See paragraph 5 of the Explanatory Notes.

