Post Valentines Day
Retail Radar

February 2022

KEPLER ANALYTICS

INSIDE SHOPPERS • OUTSIDE OPPORTUNITY • SHOPFRONT CONVERSION • SALES CONVERSION • ATV / UPT • BOUNCE RATES • RETAIL ANALYTICS • ALL MEASURES BY ZONE • SALES TO BUDGET • FITTING ROOM CONVERSION • OTHER INPUTS • DWELL TIME • FREQUENCY OF RETURN VISITS
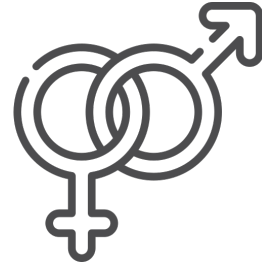
Valentines Sales have increased in Australia and New Zealand vs 2020 results.

Shoppers search intentions are earlier in the year, with gifts for males being searched through January and February.

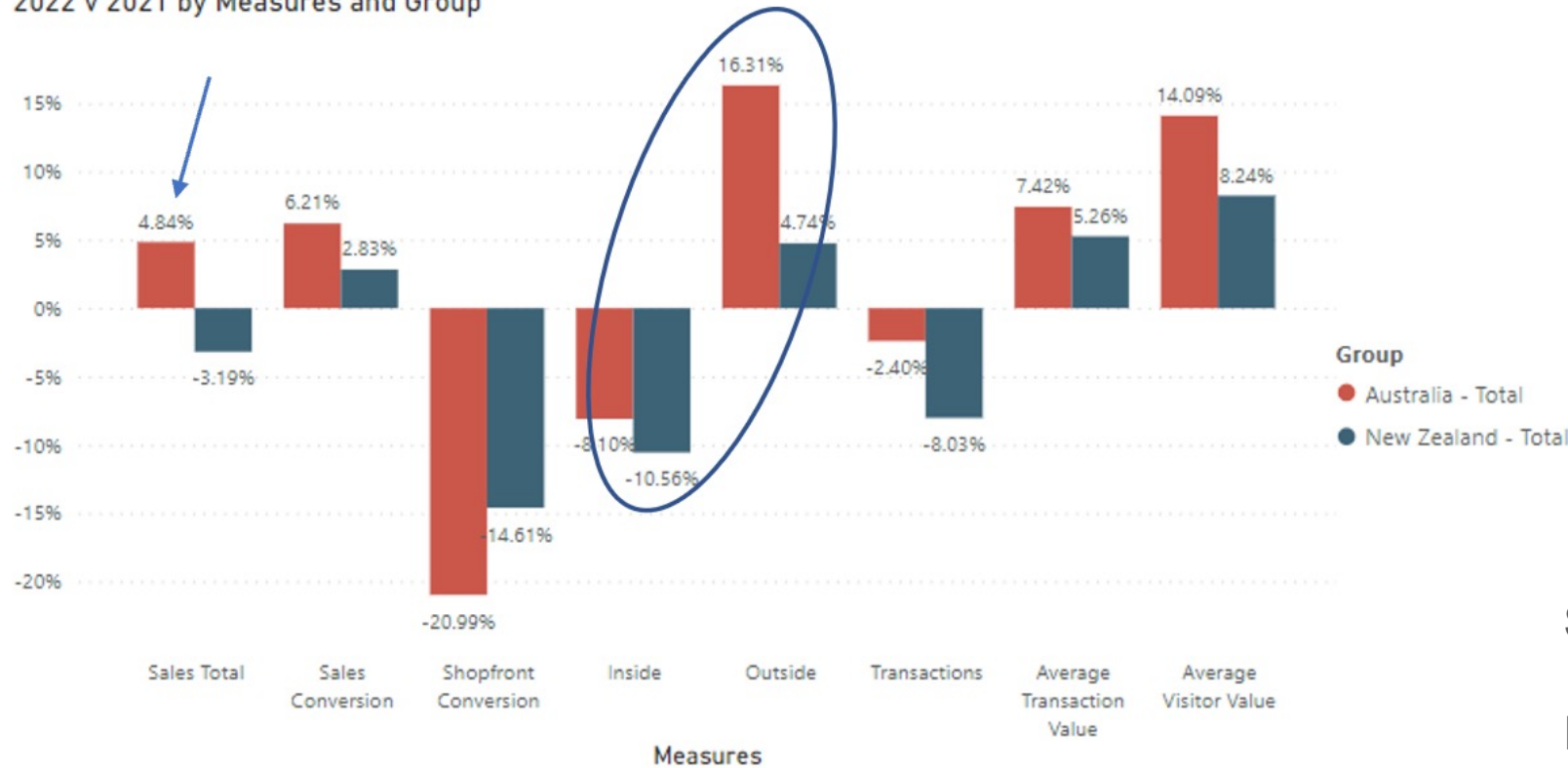Searches for "Gifts for her" are left later, but there has been notable peaks in Feb 2021 and Feb 2022.

Centre traffic continues to improves but Inside (store) traffic lags as shoppers make 'targeted visits'

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Summary of Valentine's Day Performance

2022 v 2021 by Measures and Group

Measures	Australia - Total	New Zealand - Total	**Total**
Sales Total	4.84%	-3.19%	**4.33%**
Sales Conversion	6.21%	2.83%	**6.12%**
Shopfront Conversion	-20.99%	-14.61%	**-20.68%**
Inside	-8.10%	-10.56%	**-8.21%**
Outside	16.31%	4.74%	**15.73%**
Transactions	-2.40%	-8.03%	**-2.59%**
Average Transaction Value	7.42%	5.26%	**7.10%**
Average Visitor Value	14.09%	8.24%	**13.66%**
Total			

Sales increase of ~5% in AUS

Key insight
- Traffic levels have improved
- Targeted trips mean fewer store visits per trip

2022 v 2021 by Measures and Group

Back to School

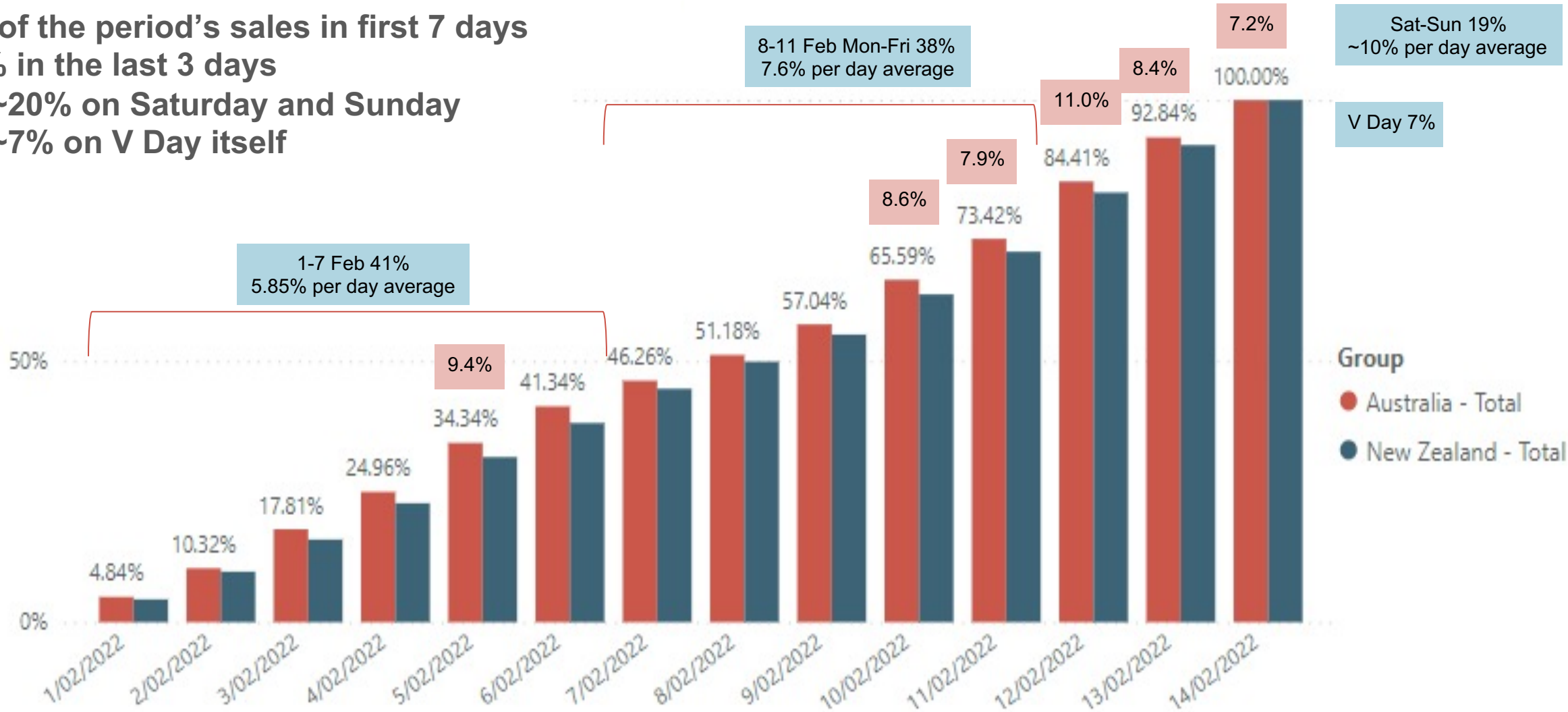| Measures	Clothing - All	Clothing - Unisex	Clothing - Women's	Footwear	General Merchandise and Electronics	Health, Beauty and Wellness	Houseware	Other Specialised Food	Stationery	Watch and Jewellery
Sales Total	5.83%	4.79%	5.10%	35.38%	8.72%	-0.21%	0.90%	2.55%	-4.94%	2.58%
Sales Conversion	10.38%	17.08%	-3.95%	-0.76%	-1.07%	1.38%	9.58%	-8.22%	9.31%	5.61%
Shopfront Conversion	-23.51%	-23.13%	-15.31%	-9.66%	-21.40%	-26.46%	-24.77%	-11.87%	-13.49%	-18.30%
Inside	-10.71%	-15.76%	2.06%	17.85%	-4.10%	-5.28%	-13.04%	14.01%	-18.68%	-11.09%
Outside	16.74%	9.59%	20.50%	30.45%	22.01%	28.79%	15.60%	29.37%	-5.99%	8.82%
Transactions	-1.44%	-1.38%	-1.98%	16.95%	-5.12%	-3.98%	-4.71%	4.64%	-11.11%	-6.11%
Average Transaction Value	7.37%	6.25%	7.22%	15.76%	14.60%	3.93%	5.89%	-1.99%	6.94%	9.25%
Average Visitor Value	18.52%	24.40%	2.98%	14.88%	13.37%	5.36%	16.03%	-10.05%	16.89%	15.38%

Sales are up (excluding Footwear 4.33% up)
- Number of sales are down for most categories
  - Key driver is the reduced Inside Traffic

- But the amount being spent is higher
  - Inflation and/or more items being bought

If your landlords are telling you 'traffic is up' – they are correct – throughout the centre BUT not for your location
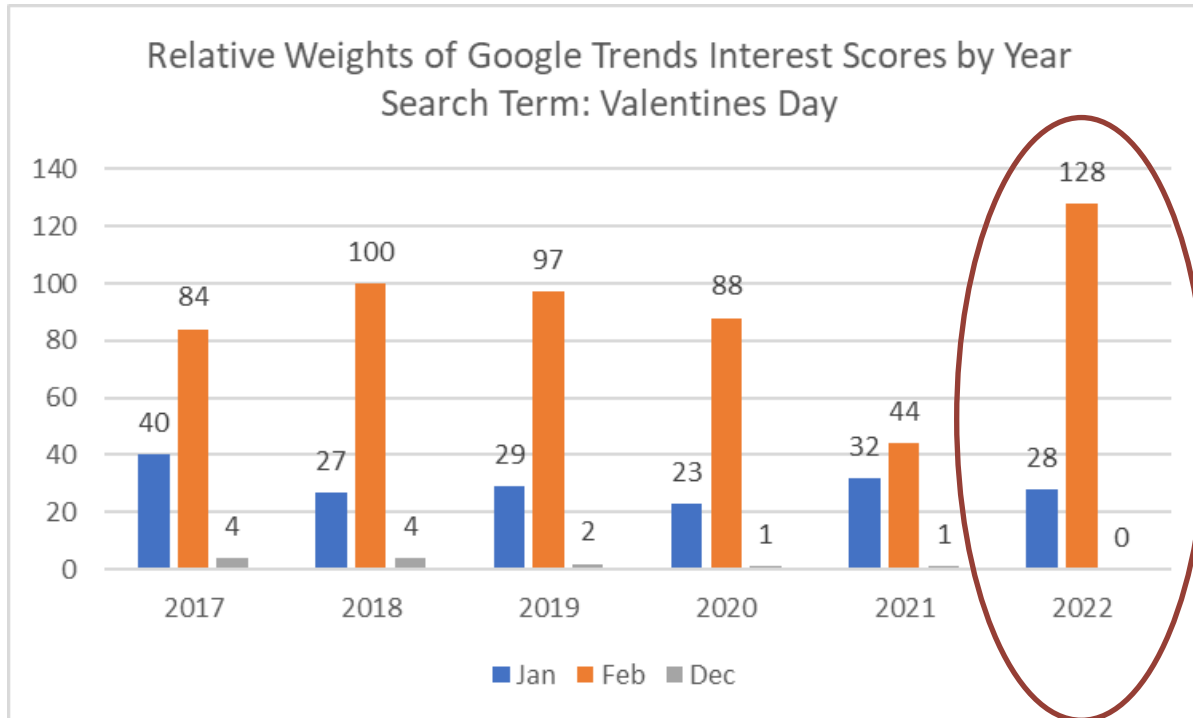
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Indications of Valentine's Day Interest

Relative Weights of Google Trends Interest Scores by Year
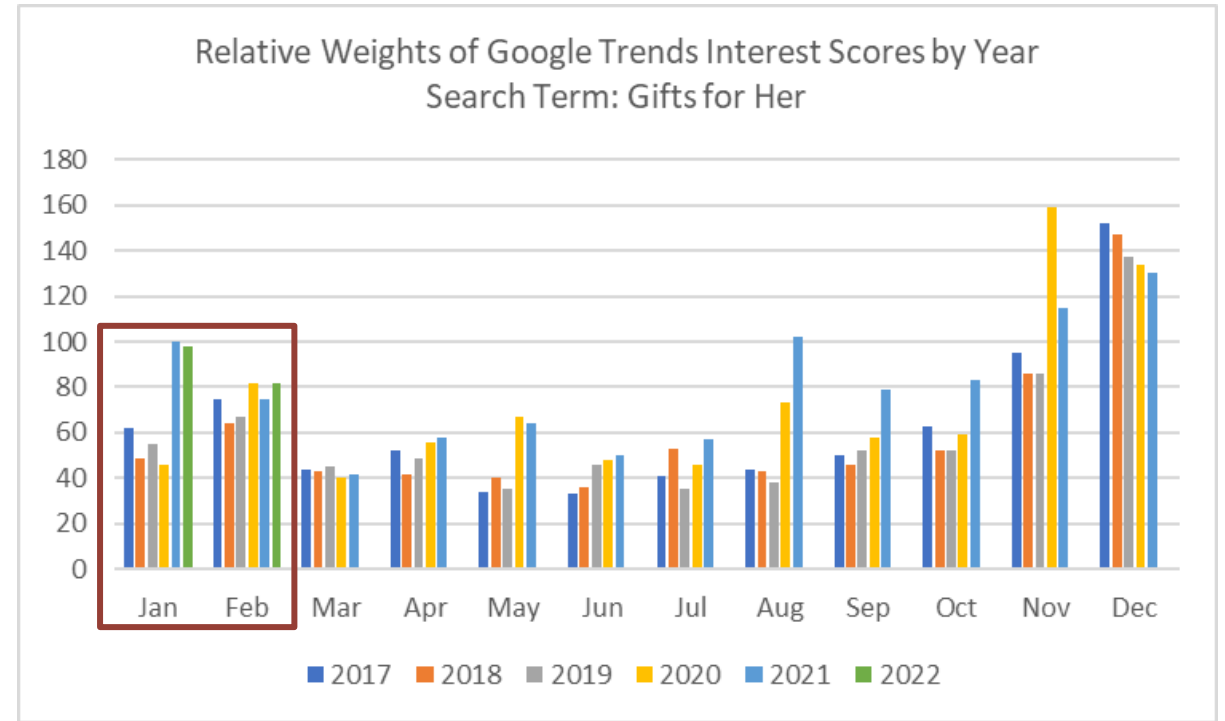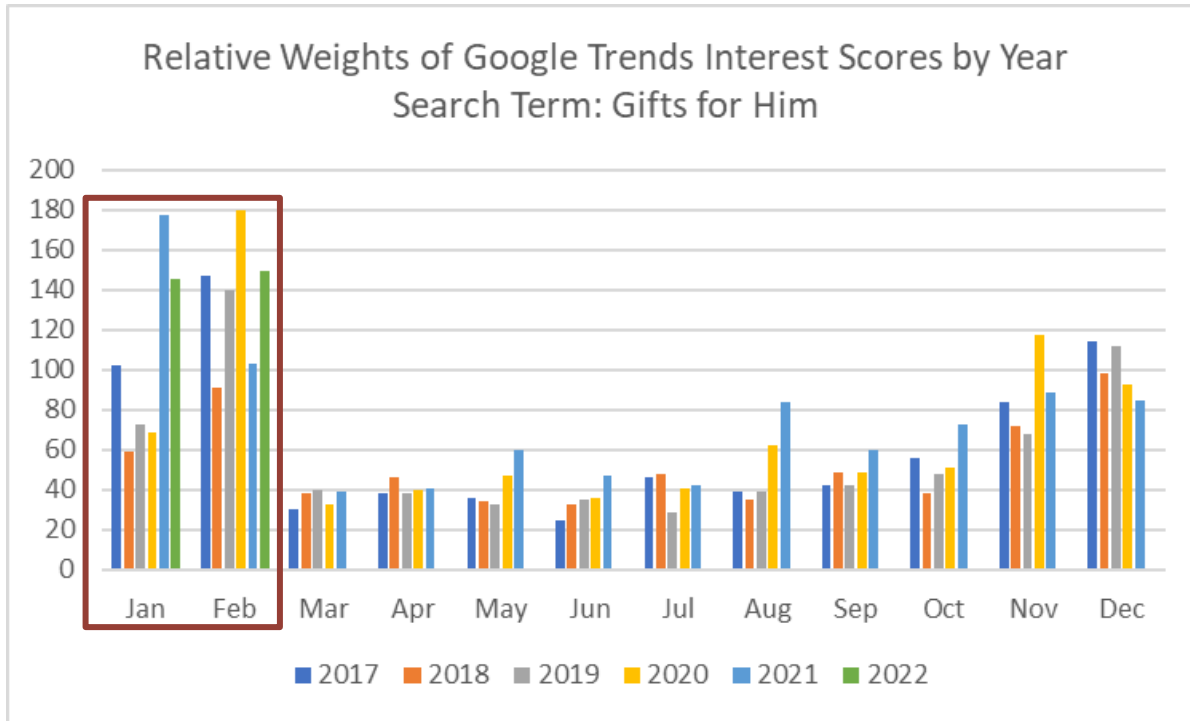Search Term: Valentines Day

Google Trends show a strong increase in Intentions this year

Indications of Valentine's Day Interest
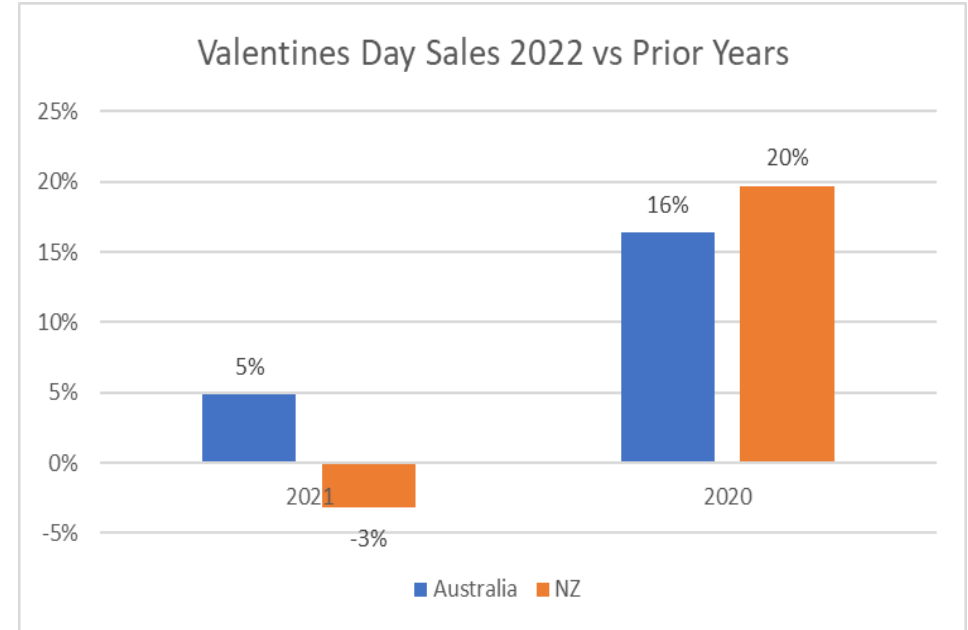
'Gifts for Her' substantially lower than 'Gifts for Him'

Valentine's Day spending plans

Valentine's Day total spend (2007 - 2022)
Per person expected Valentine's Day spending (2007 - 2022)

Per person spend values by year:
- 2007: $119.67 ($16.9B)
- 2008: $122.98 ($17.0B)
- 2009: $102.50 ($14.7B)
- 2010: $103 ($14.1B)
- 2011: $116.21 ($15.7B)
- 2012: $126.03 ($17.6B)
- 2013: $130.97 ($18.6B)
- 2014: $133.91 ($17.3B)
- 2015: $142.31 ($18.9B)
- 2016: $146.84 ($19.7B)
- 2017: $136.57 ($18.2B)
- 2018: $143.56 ($19.6B)
- 2019: $161.96 ($20.7B)
- 2020: $196.31 ($27.4B)
- 2021: $164.76 ($21.8B)
- 2022: $175.41 ($23.9B)

Legend: Per person spend · Total spend

Source: NRF's Annual 2022 Valentine's Day Spending Survey, conducted by Prosper Insights & Analytics

NRF National Retail Federation

Valentines Day Sales 2022 vs Prior Years

- 2021: Australia 5%, NZ -3%
- 2020: Australia 16%, NZ 20%

Legend: Australia · NZ

- AUS lockdowns in 21' and 20' played significant roles in the sales comparative trend
- The USA did not have the nationwide depth of lockdown that we did

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Thank You

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