

**IQ**

# Shopping Centre Visitation Tracker

September 2021

powered by



**Orbital  
Insight**

---

# Introduction



Our Shopping Centre Visitation Tracker is the largest ever dynamic study of shopping centre visitation in Australia. Historically the retail industry has relied on centre exit surveys or door counters to track customer shopping patterns, with visitor count methodology varying from centre to centre.

Harnessing the power of Orbital Insight mobile phone ping data, Location IQ has access to over 500,000 customer movements per day across a sample of over 1,000 shopping centres, dating back to September 2019. This provides consistent, independent and reliable data that is updated daily.



This publication will now be released on a monthly basis including benchmarks by centre type and State/Territory.

The outbreak of the COVID-19 pandemic and the impact of lockdown restrictions on the retail industry has been widely documented over the last 18 months.

Our Shopping Centre Visitation Tracker provides clear insights into how changes in consumer shopping habits have affected shopping centre visitation.

# Shopping Centre Foot Traffic by Centre Type

The latest shopping centre visitation figures (September 2021) indicate that the recent Delta-driven Covid-19 outbreak has driven foot traffic in higher-order shopping centres (Regional and City Centres) to levels that are comparable with the early days of toilet paper shortages 18 months ago!

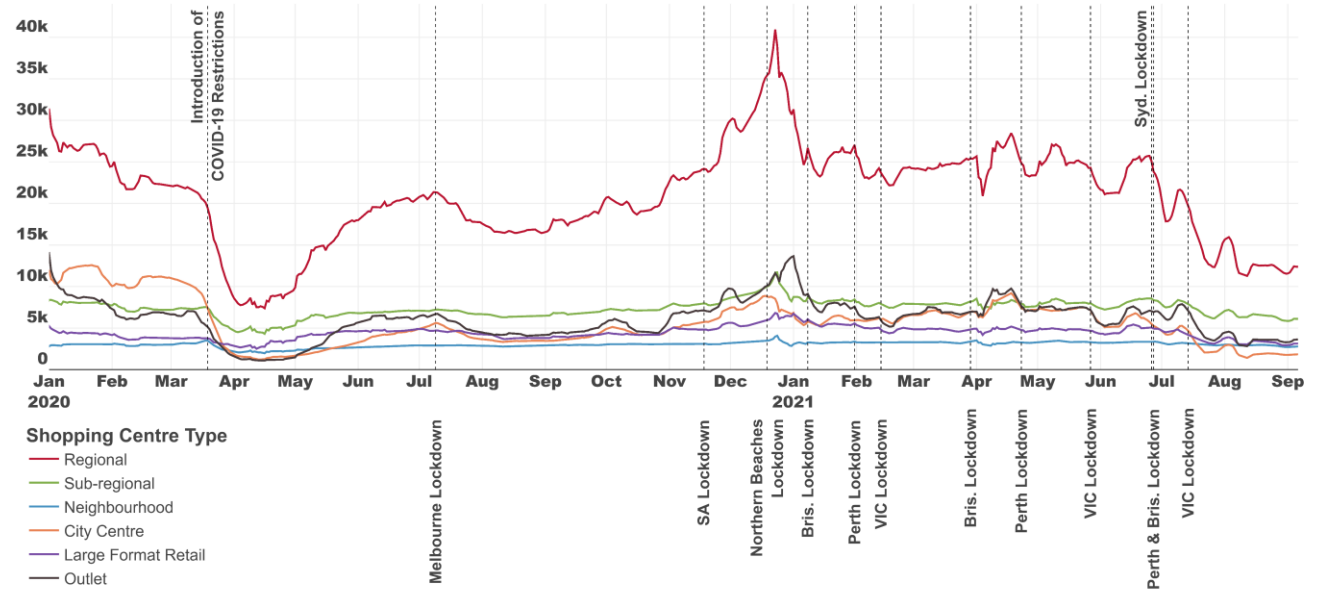
So, have we finally reached the bottom? There is light at the end of the tunnel as 'Freedom Day' approaches in States nearing the 70% and 80% vaccination targets, after which point, restrictions are expected to be rapidly rolled back.

Neighbourhood (supermarket-based) shopping centres are the only centre type to maintain pre-Covid visitation levels over the past 18 months. With over half the nation still in lockdown, a trip to the local supermarket is considered a treat for many! Any slight increases in Neighbourhood centre visitation (resulting from the closure of all other non-essential retailers) have been moderated by the shift in consumer shopping patterns (e.g., increased uptake in online grocery shopping and Direct to Boot/Click&Collect), as well as interruptions to the local supply chain which have limited stock availability.

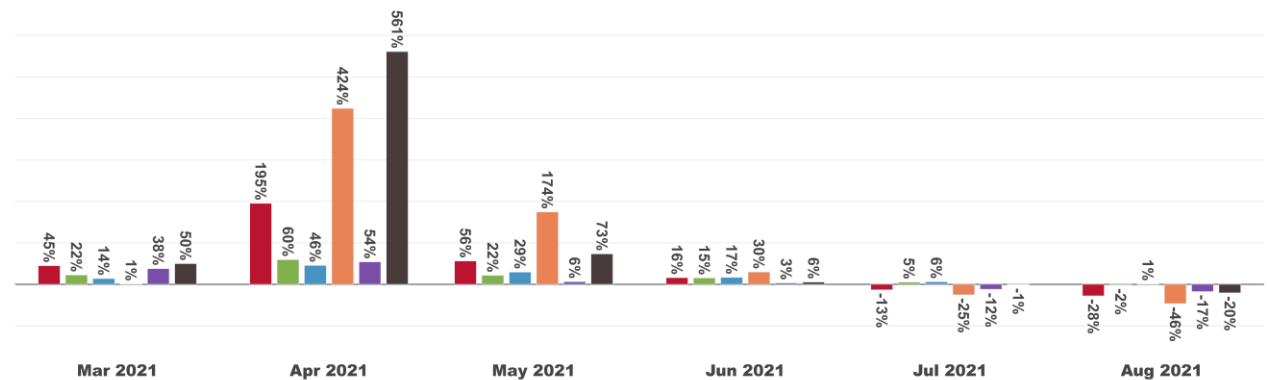
The latest City Centre visitation levels are almost 50% lower than August 2020 figures - which were already impacted by the First Wave of the Covid-19 outbreak. Overall, City Centre visitation levels are one-quarter of pre-Covid levels. City Centre visitation is likely to be the slowest centre type to recover from the latest Covid-19 outbreak, given the structural shift in the workplace practices towards working from home. This was the case during the 2020 outbreak, with visitation levels returning to ~60% - 70% of pre-Covid-19 levels.

Regional, Large Format Retail and Outlet centres (selling discretionary goods) are recording foot traffic levels which are ~20% - 30% lower compared with 12 months earlier. We expect these centre types to bounce back relatively quickly once vaccination targets are reached and restrictions are eased in the coming weeks, with significant pent-up demand resulting from retailer closures and travel restrictions.

## 7 Day Moving Average



## Month on Same Month in Previous Year - %Change



# Shopping Centre Foot Traffic by Region

Shopping centre visitation levels across Greater Sydney and Melbourne appear to have stabilised over the past month, as lockdown restrictions have remained in place. However, vaccination levels in New South Wales and Victoria are creeping ever-closer towards the 70% and 80% targets.

We expect the recovery (in terms of shopping centre visitation) to be rapid, with vaccinations being a game-changer in terms of freedom of movement for Australians.

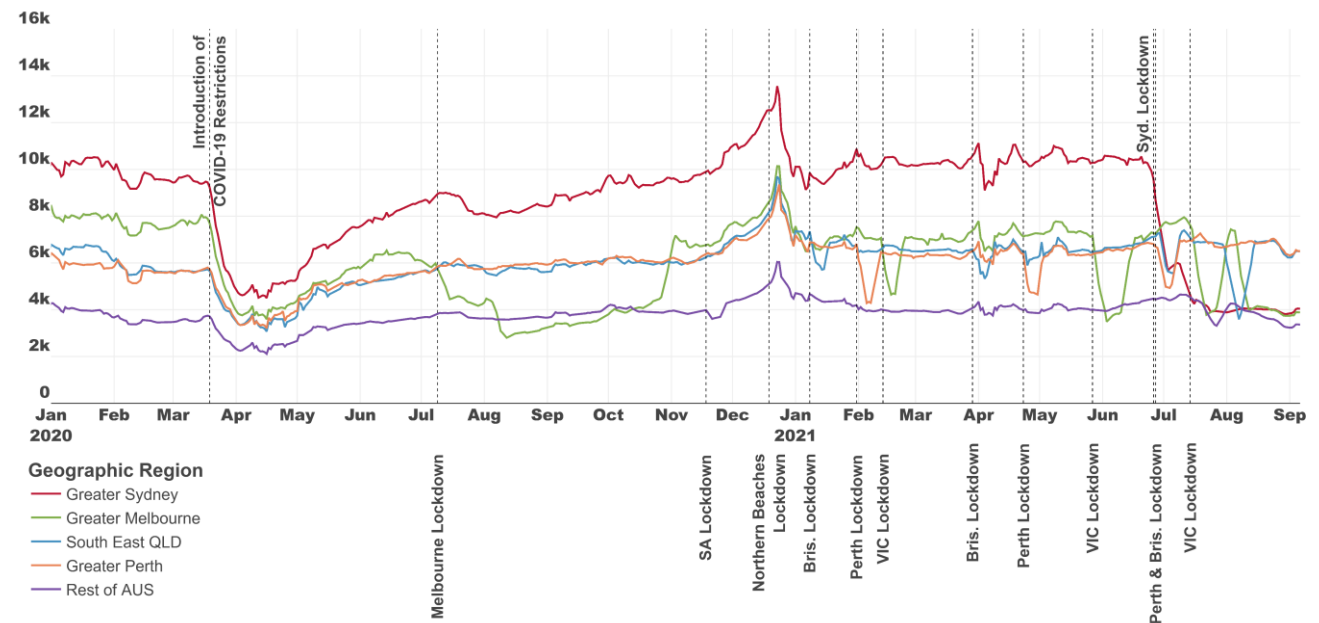
Perth shopping centre visitation levels are still at pre-Covid levels; the payoff for a closed-border approach that has made Western Australia an island within an island.

Similarly, South-East Queensland has generally maintained close to pre-Covid levels of shopping centre visitation throughout 2021, although could be on the verge of another snap lockdown as a result of the latest Delta outbreak in recent days.

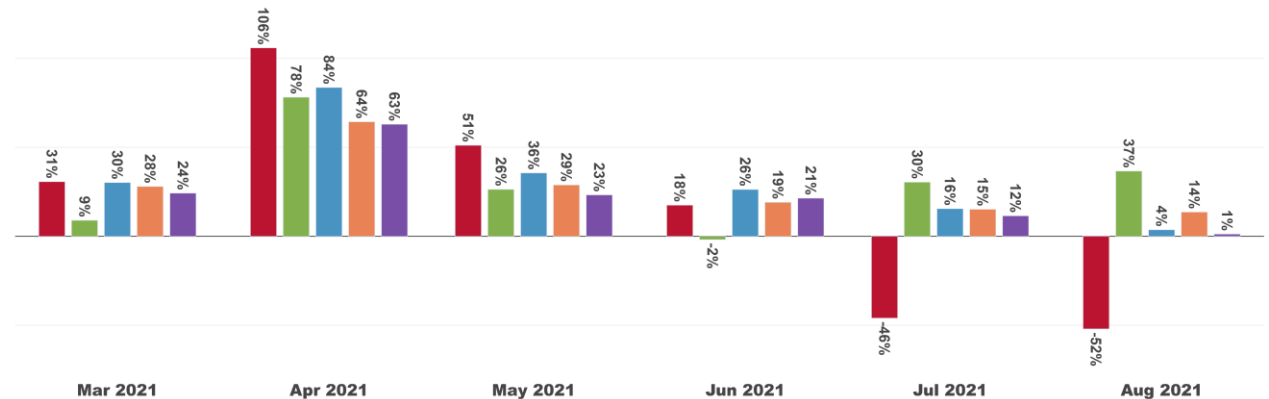
August 2021 figures indicate that Sydney shopping centre visitation is still around half the levels recorded in August 2020. While Melbourne is showing almost 40% growth in August 2021 vs August 2020, this is a reflection of low 2020 base levels as a result of multiple lockdowns over the last 18 months. Melbournians are now approaching 250 days in captivity!

Regional areas of Australia have continued to be relatively insulated from the impacts of the pandemic and as such, have experienced more muted peaks and troughs in terms of centre visitation, compared with the major capital cities.

7-Day Moving Average



Month on Same Month in Previous Year - %Change



**Geographic Region**

- Greater Sydney
- Greater Melbourne
- South East QLD
- Greater Perth
- Rest of AUS

---

## How else can the data be used?

Partnering with Orbital Insight has given Location IQ access to powerful location data for understanding customer behavior. Shown at an aggregate level in this report, the data can be used for individual shopping centres or precincts and can be analysed by year, month, day or hour. The data is refreshed daily and is available from September 2019 to present.

We use this data to understand when customers visit, where they come from, how long they stay and where else they shop. This allows Location IQ to provide our client with the data they need to make the right decisions.

Location IQ has used the Orbital Insight data to help clients with assessing their own assets, evaluating potential acquisitions and understanding the impact of competitors.

Please contact us at [hello@locationiq.com.au](mailto:hello@locationiq.com.au) or 02 8248 0100 if you would like to discuss the application of this data for your site, centre or portfolio.



Live feed for your individual centres, competitors, entire portfolios



Trade area definition - understand where customers live and work



Dwell time analysis – how long do customers stay? Has it changed?



Understand visitation by time of day, day of the week, time of year



Cross visitation – where do customers go before and after visits?

LOCATIONIQ.COM.AU

SUITE 5, LEVEL 27, 25 MARTIN PLACE SYDNEY NSW 2000

(02) 8248 0100