

IQ

# Shopping Centre Visitation Tracker

November 2021

powered by



**Orbital  
Insight**

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# 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 (October 2021) indicate a surge in foot traffic to higher-order suburban shopping centres (Regional and Outlet Centres), to levels that are now higher than 12 months ago.

'Freedom Day' was reached in NSW and Victoria on 11th October and 24th October, respectively. Mid-December is the date across many states when unvaccinated residents will enjoy greater freedoms, which hopefully will see another boost in visitation - just in time for Christmas.

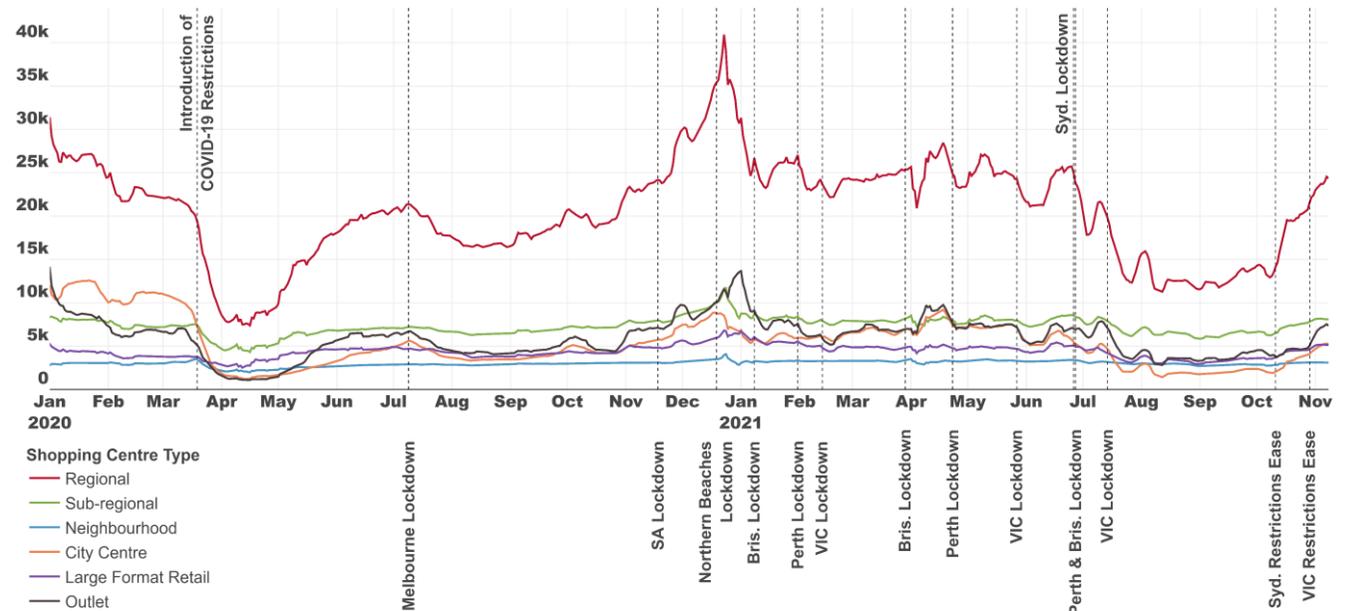
The latest **City Centre** visitation levels are almost 30% lower than October 2020 figures - which were already impacted by the 'First Wave' of the Covid-19 outbreak. Overall, City Centre visitation levels are half pre-Covid levels. With many offices not reopening until 2022, we do not expect to see a return to pre-COVID levels for some time. Interestingly, City Centres are enjoying strong visitation on weekends, as residents are undertaking their leisure activities in town (eating out and shopping).

In October, **Regional and Outlet Centres** (selling discretionary goods) recorded foot traffic levels which were ~10% lower compared with 12 months earlier. Initial indications for November show visitation rates are now higher than one year ago, highlighting people's increasing willingness to engage 'face to face' in recent weeks.

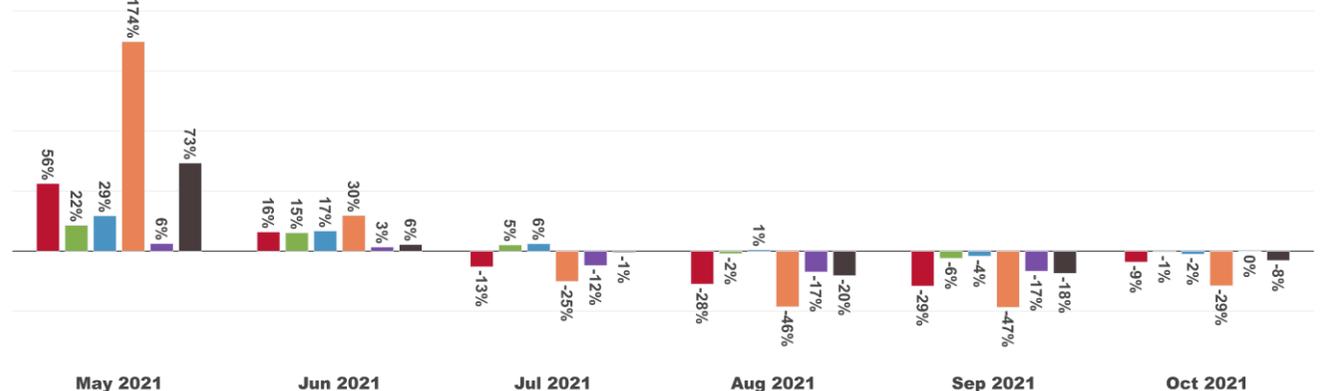
**Neighbourhood (supermarket-based) shopping centres** have again maintained a relatively stable level of visitation, as the major supermarkets continue to fulfil the everyday needs of Australians.

Contrary to some predictions about their relevancy to consumers, **sub-regional shopping centres**, have enjoyed visitation rates at a similar level to last year over each of the past four months (since restrictions applied in NSW and Victoria). These centres have clearly not experienced the same declines in customer visitation as compared with lockdowns in 2020.

## 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 have increased sharply over the past month, as lockdown restrictions have eased. Vaccination levels in New South Wales and Victoria are now both over 90%.

The recovery (in terms of shopping centre visitation) has been rapid but could be somewhat constrained until freedoms are available for the unvaccinated. As shown, New South Wales enjoyed a rapid increase in visitation post reopening but is still well below visitation rates from one year ago.

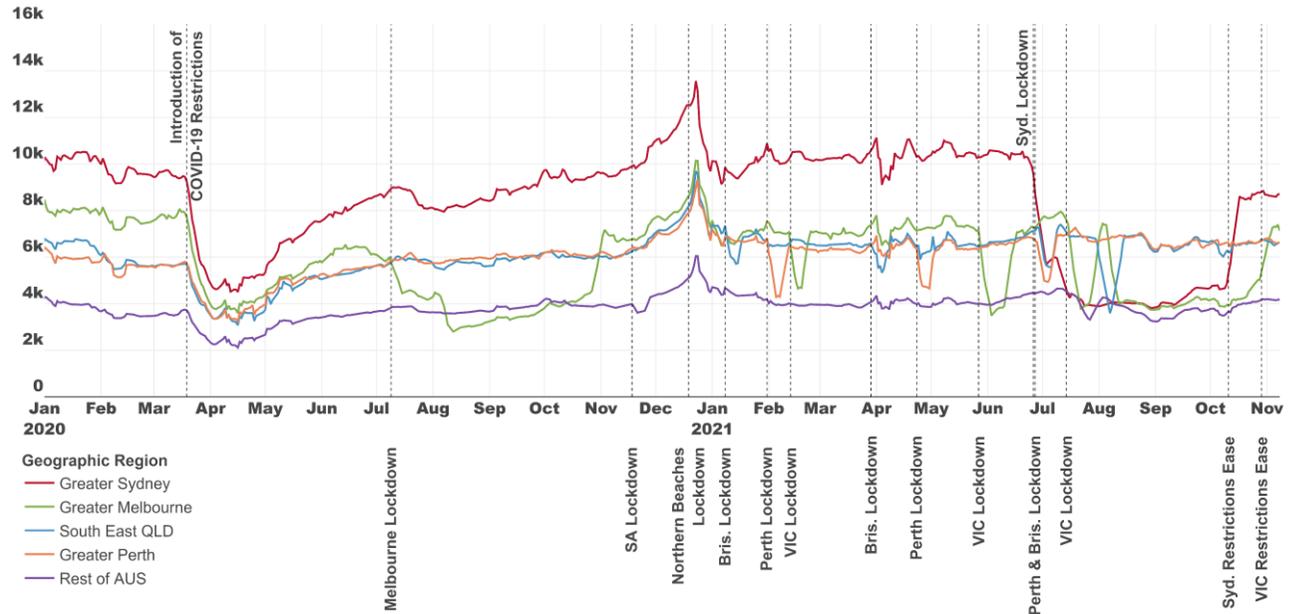
October 2021 figures indicate that Sydney shopping centre visitation is still around 80% of the levels recorded in October 2020. While Melbourne is showing slight growth (3% in October 2021 vs October 2020), this is a reflection of low 2020 base levels as a result of multiple lockdowns over the last 18 months.

Perth shopping centre visitation levels are still at pre-Covid levels; and have increased over each of the five past months.

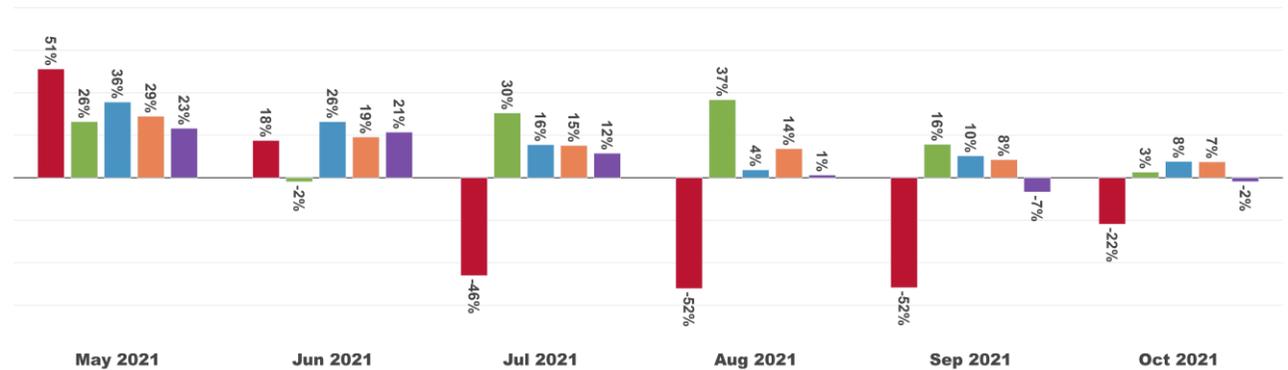
Similarly, South-East Queensland has also experienced higher visitation for each of the past five months, with only a brief lockdown period in August.

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, however, noting declines in visitation in the past two months (reflecting lockdowns in regional NSW and Victoria).

7-Day Moving Average



Month on Same Month in Previous Year - %Change



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# 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?

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