

DIRECTIONAL INSIGHTS



Consumer Shopping Benchmarks **2011** **Australian Shopping Centres**

keeping you in touch



● CONSUMER SHOPPING BENCHMARKS 2011

The “who and how” of Australian shopper behaviour

The Directional Insights Consumer Shopping Behaviour Benchmarks 2011 provide a powerful window into Australian consumers' current shopping behaviour and motivations and their perceptions of a shopping centre.

Analysis of detailed interviews with over 26,000 retail consumers reveal the “who and how” of Australian shopper behaviour and provide perceptions of and loyalty to a shopping centre. This information is presented in eight separate reports, seven providing detailed insight by shopping centre type and location and the Australian Shopping Centres Benchmark Report 2011 which gives an overview of Australian shoppers' behaviour; invaluable to senior management and those working at a centre level. The reports can be purchased individually or as a series.

Armed with the appropriate benchmark report, shopping centre managers and marketers have a powerful management tool which reveal *who* their customers are and *how* they behave relative to customers in similar shopping centres across Australia. The benchmark reports are published every two years by Directional Insights, Australia's leading consumer shopping behaviour experts.



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● AUSTRALIAN *centres*

The following benchmark report is based on a sample of approximately 26,000 customer interviews conducted in all Shopping Centre types across Australia.

● DEFINITION

The results within this report reflect the shopping behaviour of average Australians. 26,000 shopper interviews have been included in this report. These shoppers have been interviewed in a range of shopping centre types from small neighbourhood centres to the larger super-regional shopping centres all over Australia.

Overall the results reflect the average shopping centre behaviour for Australian shoppers.



● AUSTRALIAN CENTRES: *Who is shopping*

● INTRODUCTION

Customers of Australian Shopping Centres are predominantly Females living as a couple either with or without children at home.

Predominately the customers are in paid employment, either part-time or full-time and are either retired/superannuated, in a Professional position or undertaking home duties. They are generally Australian born and have a household income of around **\$69,000**.

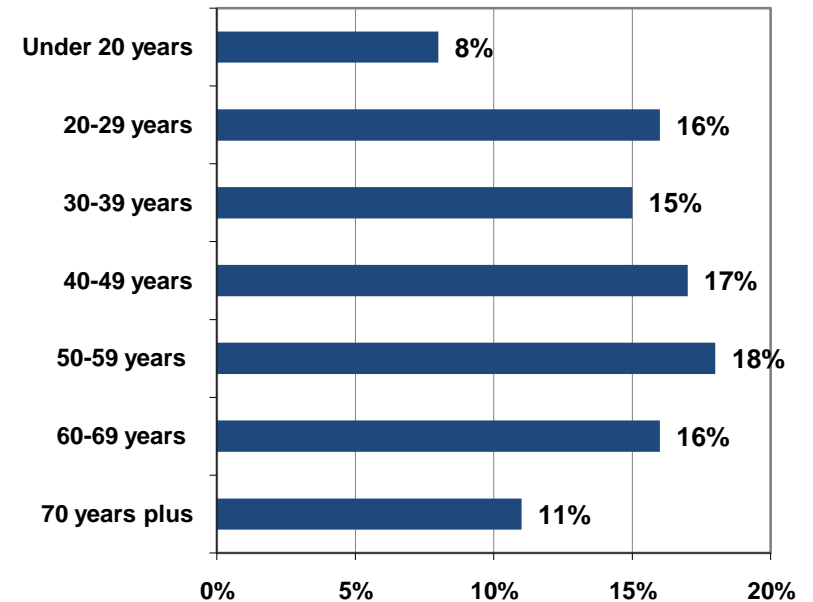
● GENDER

Overall, **72%** of customers of Australian Centres are **Female**.
28% of customers are Male.

● AGE

The average age for customers of Australian Centres is **46 years**.

The highest proportion of customers at 18% are aged 50-59 years.



Note: Only customers of 15 years and over can be interviewed in Shopping Centres. As a result, the Australian Bureau of Statistics' average age statistic, which includes under 15 year olds, is not directly comparable to the average age calculation applied here.

● AUSTRALIAN CENTRES: *Who is shopping*

● HOUSEHOLD TYPE

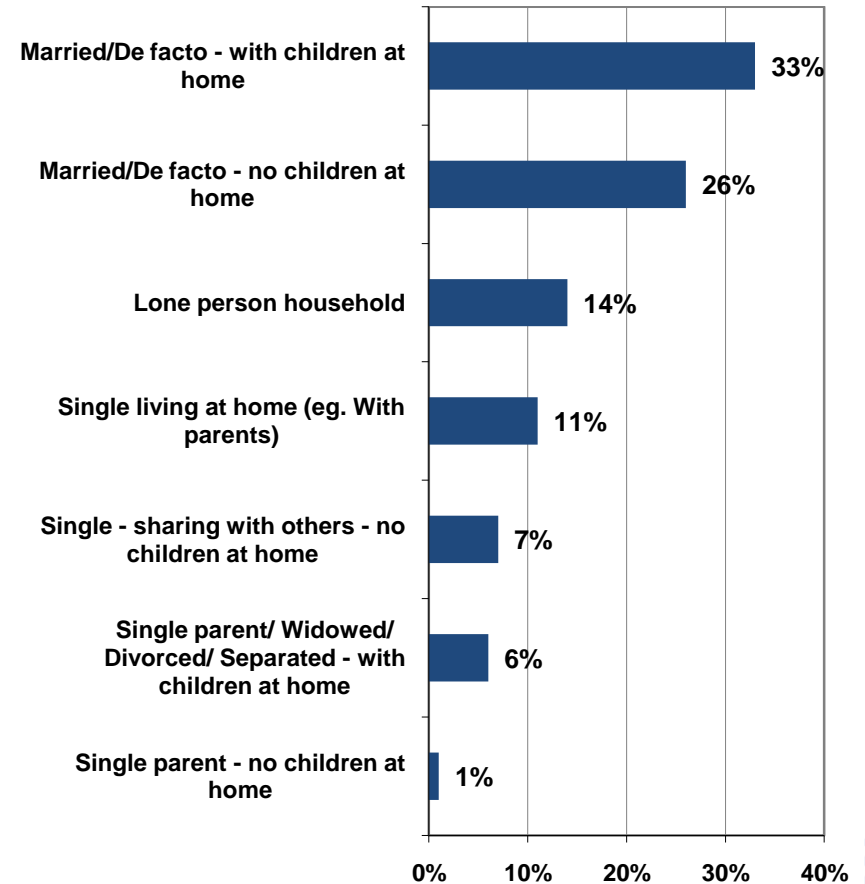
Australian Centres are represented by two household structures.

- **Married/de facto – with children at home 33%.**
- **Married/de facto – no children at home 26%.**

Households with children represent **50%** of the total household structures, whilst **48%** of customers live in SINK/DINK households.

SINK = Single income no kids

DINK = Double income no kids, empty nesters



● AUSTRALIAN CENTRES: *Who is shopping*

● HOUSEHOLD SIZE

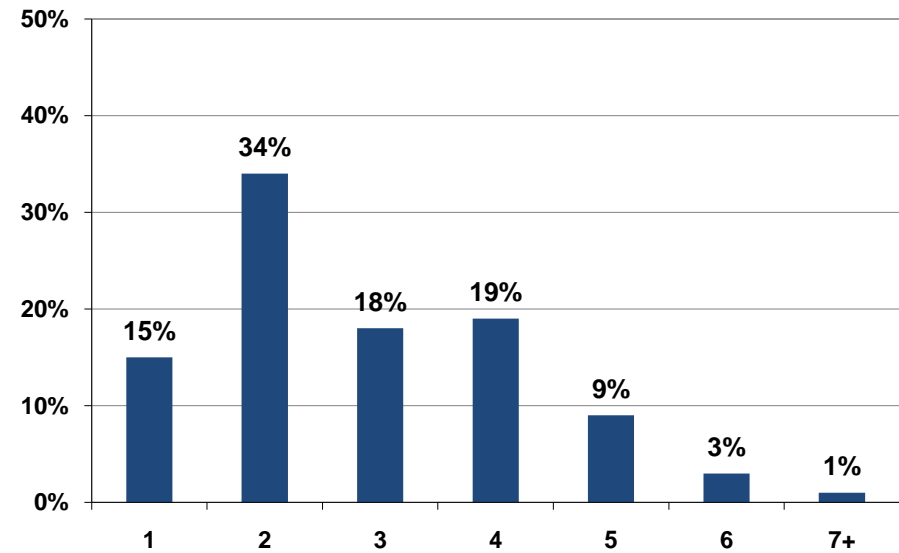
34% of Australian Centres customers live in two person households. 19% have four people living in their households while 18% have three.

15% of Australian Centres customers live alone while 13% have more than four people living in their home.

The average household size for Australian Centres is 2.93 people.

● COUNTRY OF BIRTH

With regard to country of birth **70%** of customers visiting Australian Centres are born in Australia.



● AUSTRALIAN CENTRES: *Who is shopping*

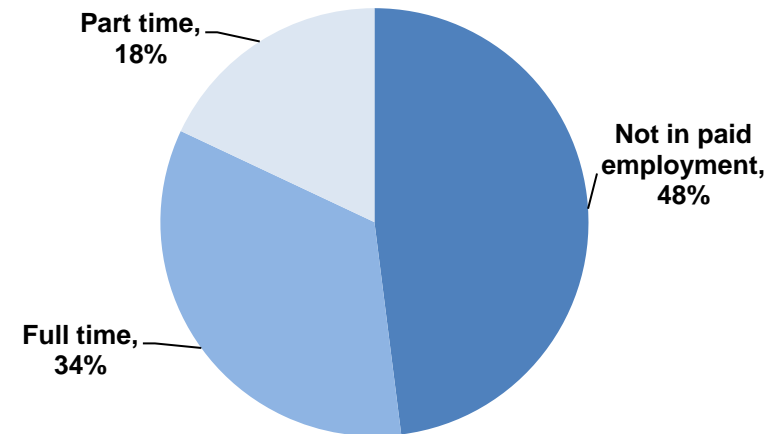
● EMPLOYMENT STATUS AND OCCUPATION

48% of customers in Australian Centres are currently not in paid employment, whilst **34%** of customers work full time and a further **18%** of customers work part time.

Main employment/position categories for customers of Australian Centres include:

- Retired/Superannuated **20%**
- Professional **17%**
- Home Duties **16%**
- Student **9%**
- Clerical or Administrative Worker **9%**
- Manager **6%**

In total, 23% are in either professional or managerial positions.



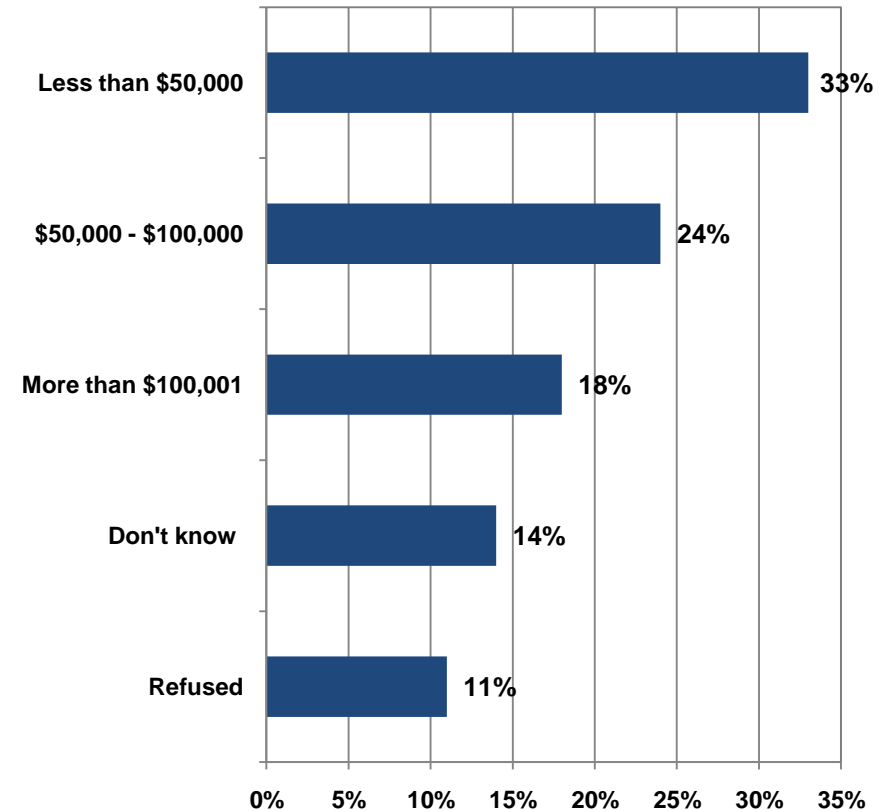
● AUSTRALIAN CENTRES: *Who is shopping*

● HOUSEHOLD INCOME

The average household income for customers of Australian Centres is approximately **\$69,000**.

33% of customers of Australian Centres have a household income of \$50,000 or less. **24%** of customers of Australian Centres have a household income of \$50,000-\$100,000 while a further **18%** have a household income of more than \$100,001.

In total, **25%** of customers either refused or didn't know their household income.

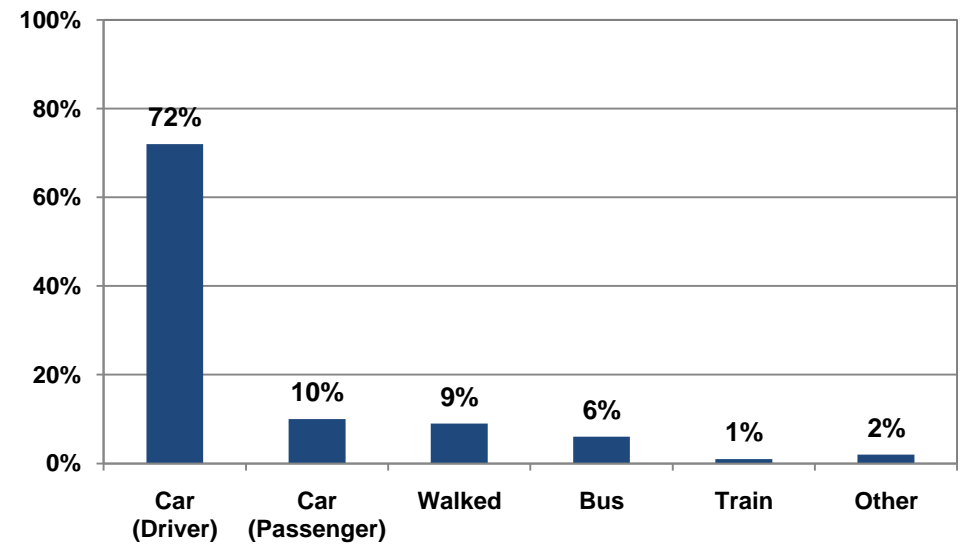


● AUSTRALIAN CENTRES: *How they shop*

● TRAVEL TO THE CENTRE

The main mode of travel for customers of Australian Centres is by car at **82%**, as either a driver or passenger.

8% of customers on average walked to Australian Centres while **6%** of customers travelled by bus. **2%** of customers travelled to Australian Centres by other means.



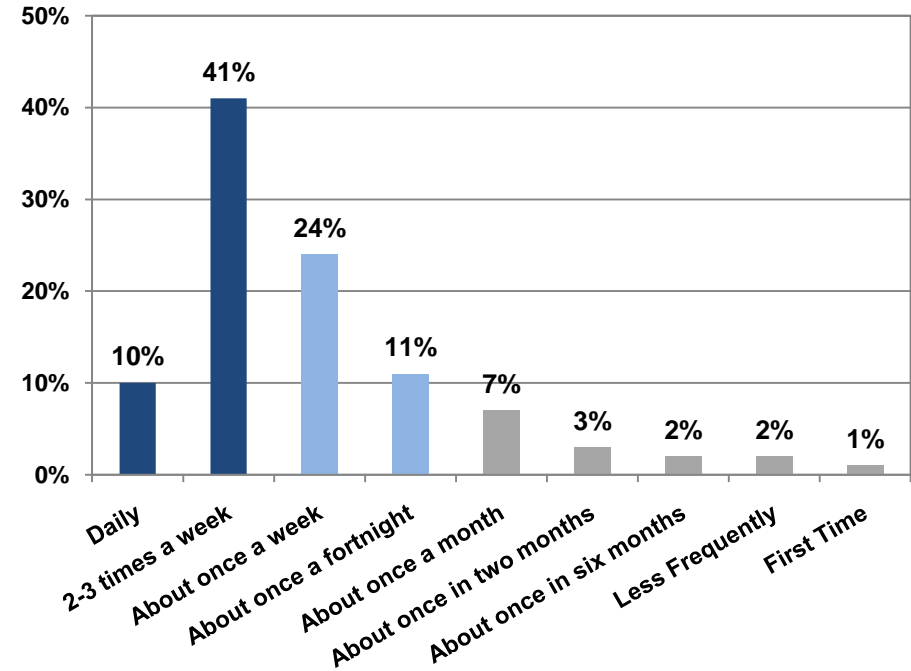
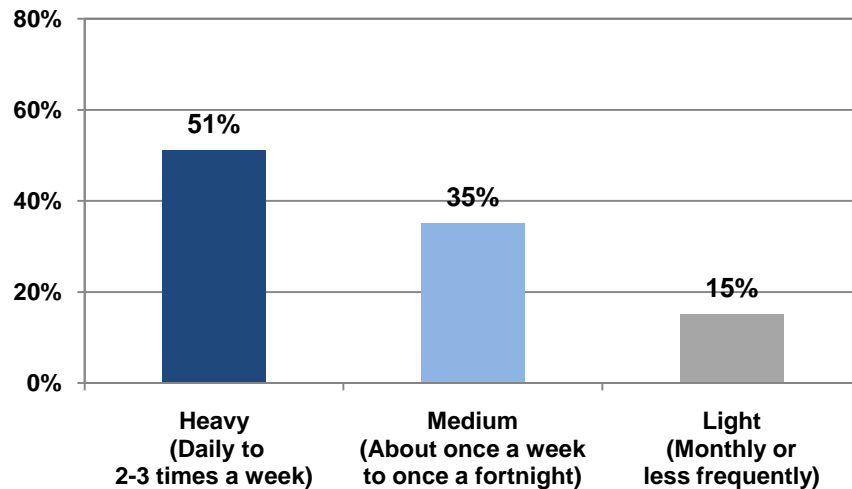
● AUSTRALIAN CENTRES: *How they shop*

● FREQUENCY OF VISIT

75% of customers visit Australian Centres weekly or more often, with 10% of customers visiting Australian Centres on a daily basis.

51% of customers of Australian Centres are heavy users of the Centre, 35% of customers are medium users and 15% of customers are light users.

● CUSTOMER CLASSIFICATION AS HEAVY, MEDIUM AND LIGHT USERS



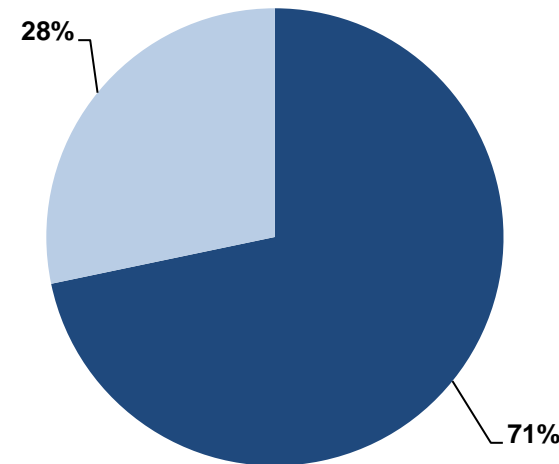
● AUSTRALIAN CENTRES: *How they shop*

● SHOPPING TRIP – MISSION versus LEISURE

Customers were asked to describe the type of shopping trip undertaken at Australian Centres on the day of their visit.

- **Mission Shopping** : I was here for a specific purpose, I moved quite quickly through the centre, did my shopping and am now leaving.
- **Leisure Shopping** : I shopped at a more leisurely pace, I took my time and enjoyed the experience.

71% of customers of Australian Centres described their shopping trip as purpose or mission driven. **28%** of customers described their shopping trip as leisure driven.



- I was here for a specific purpose, I moved quite quickly through the centre, did my shopping, and am now leaving
- I shopped at a more leisurely pace, I took my time and enjoyed the experience

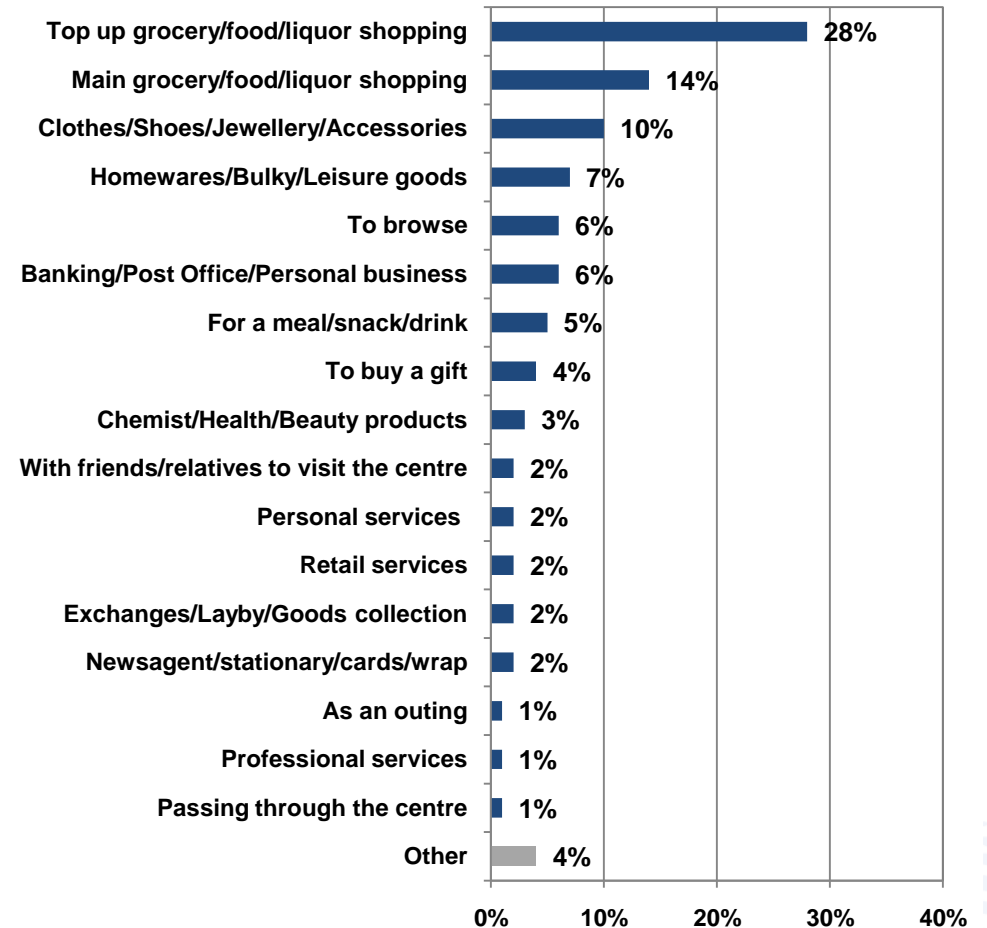
● AUSTRALIAN CENTRES: *How they shop*

● MAIN REASON FOR VISITING

Food shopping is the main driver for customers visiting Australian Centres, with **28%** of customers indicating their main reason for visiting the Centre on the day they were interviewed was for **top up grocery/food/liquor shopping**. An additional **14%** of customers' main reason being for their main grocery shopping.

Overall, **42%** of Australian Centres customers' main reason to visit their Centre was to shop for groceries.

This was followed by **10%** of customers visiting for clothes/shoes/jewellery/accessories, **7%** of Australian Centres customers visit for homewares/bulky/leisure goods and **6%** stated their main reason for visiting was to browse or for banking/personal business.



● AUSTRALIAN CENTRES: *How they shop*

● GOODS AND SERVICES PURCHASED

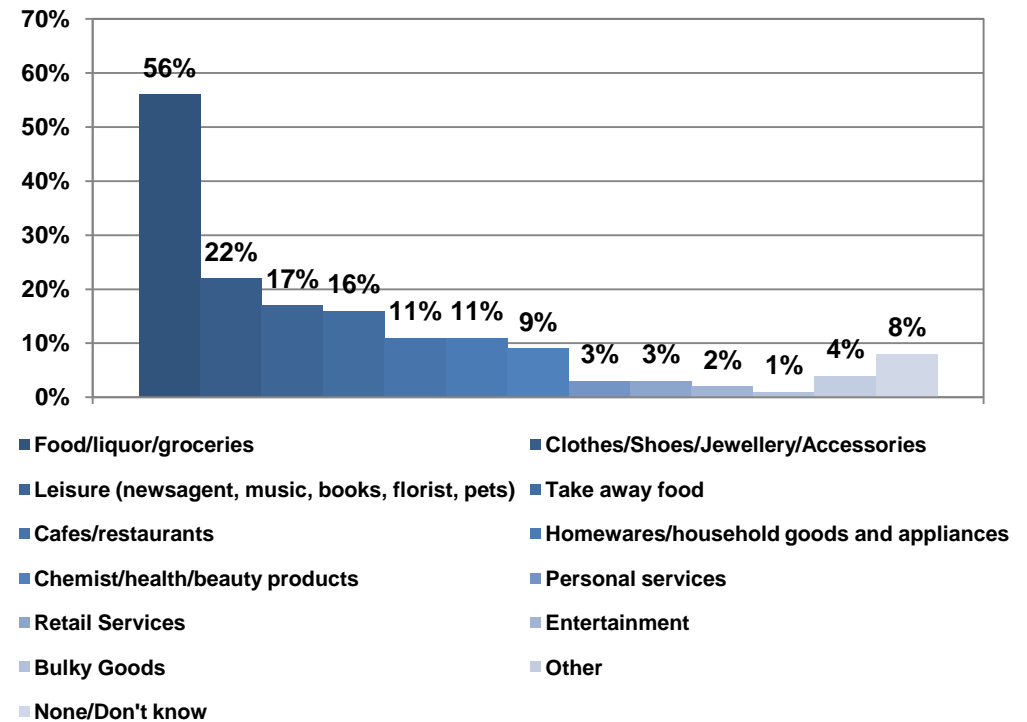
Consistent with the main reason for visiting Australian Centres listed previously, customers indicated the main type of goods and services purchased were **food/liquor/groceries** at **56%** and **clothes/shoes/jewellery/accessories** at **22%**.

17% of customers of Australian Centres purchased **leisure goods**. This was closely followed by **16%** of customers purchasing **take away food**.

11% of customers of Australian Centres purchased from **cafes and restaurants**, while another **11%** of customers purchased **homewares/household goods**.

Chemist/health/beauty products were purchased by 9%.

12% of customers of Australian Centres either **did not purchase anything or did not know**.



● AUSTRALIAN CENTRES: *How they shop*

● STORES VISITED

Customers were asked about their store visitations whilst at Australian Shopping Centres.

This reflects a range of shopping centre type visitation from super regional centres to smaller neighbourhood centres and shows the type of store visitation common across Australia.

Woolworths Supermarket was visited by **41%** of Australian Centre customers while **38%** visited **Big W** and **Coles**.

Kmart was visited by **31%** of customers while **22%** visited **Target**.

Myer has more visitation than **David Jones** at **21%** compared to **15%**.

Store Type	% of Customers
Woolworths Supermarket	41%
Big W	38%
Coles Supermarket	38%
Kmart	31%
ALDI	28%
Target	22%
Myer	21%
Clothing store	17%
Take away food/eatery	16%
David Jones	15%
Specialty fresh food stores (eg. Butcher)	14%
Restaurant/Cafe	10%
Leisure good store (eg. Books, music)	9%
Newsagent	9%
Best & Less	8%
Chemist	8%
Discount Stores (eg. Go-Lo/Reject Shop)	8%
Homewares/ Household goods and appliance store	7%
Bank/Building Society	6%
Shoes/Jewellery/Accessories store	6%

NOTE: Discount stores not comparable to 2009 benchmarks due to definition change.

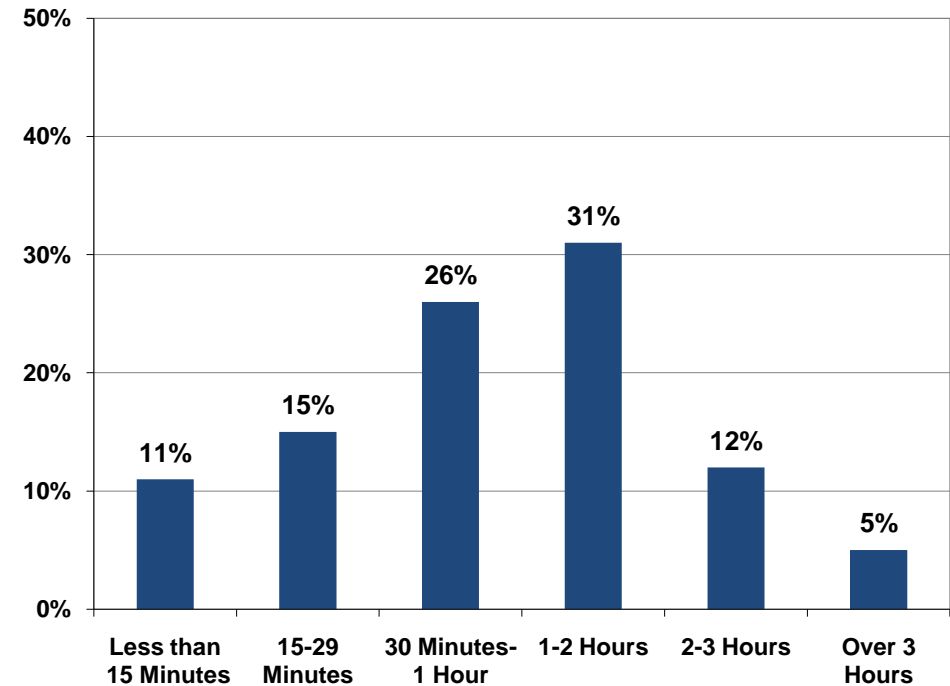
● AUSTRALIAN CENTRES: *How they shop*

● LENGTH OF STAY

Customers spend **61 minutes** on average per visit at an Australian Shopping Centre.

26% of customers stay at Australian Centres for less than **30 minutes**. While **12%** of customers stay at Australian Centres for **two to three hours**.

The highest proportion of Australian Centres customers at **31%** stay for **1 to 2 hours**.

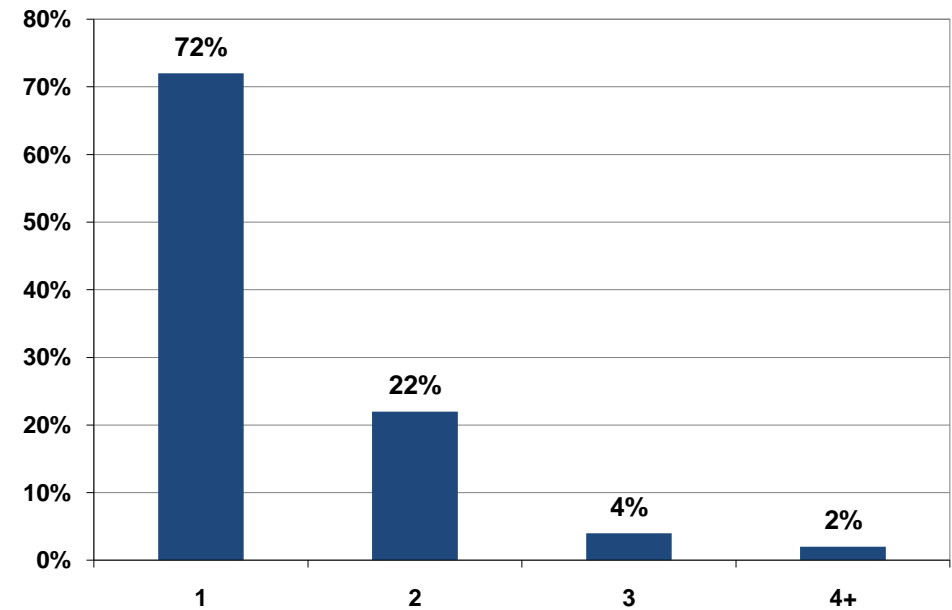


● AUSTRALIAN CENTRES: *How they shop*

● GROUP SIZE

Australian Centre customers were observed to determine the number of people they shop with. **The average group size in Australian Centres is 1.36 people.**

The majority at 72% shopped alone while 22% shopped with one other person. 4% of customers shopped in a group made up of three people while 2% shopped in a group of four or more people.



● AUSTRALIAN CENTRES: *How they spend*

● COMMODITY GROUP EXPENDITURE

Customers were asked to detail their expenditure while shopping at Australian Centres. The expenditure was categorised into seven groups.

- Food Retail
- Food Catering
- Apparel
- Homewares
- Bulky Goods
- General/Leisure
- Services

Definitions of each commodity group are included in the back of this report.

Of the customers interviewed at Australian Centres, **91%** of customers made a purchase on their visit.

Average spend at Australian Centres is **\$70** across all customers and **\$77** per customers making a purchase.

This table indicates the total percentage of spend for each commodity group, the average spend in each commodity group for all customers, and the average spend for just those making a purchase in the commodity group.

Commodity Group	% of Customers Purchasing	% of Total Spend	Average Spend (All Customers)	Average Spend (Customers Purchasing Only)
Food Retail	56%	47%	\$33	\$59
Food Catering	26%	4%	\$2.56	\$9.99
Apparel	22%	23%	\$16	\$73
Homewares	11%	9%	\$6	\$56
Bulky Goods	1%	1%	\$1	\$50
General/Leisure	25%	12%	\$8	\$33
Services	7%	5%	\$4	\$58
Total	91%	100%	\$70	\$77

● AUSTRALIAN CENTRES: *How they spend*

● FOOD RETAIL

56% of customers of Australian Centres purchased Food Retail, with an average spend by customers purchasing Food Retail at **\$59** per person and an average spend for all customers at **\$33**. The proportion of total spend attributable to Food Retail is **47%**.

● FOOD CATERING

Food Catering was purchased by **26%** of Australian Centres customers, accounting for **4%** of total spend. The average spend by customers purchasing only is **\$9.99** and the average spend by all customers is **\$2.56**.

● APPAREL

22% of customers purchased Apparel at Australian Centres, accounting for **23%** of total spend. The average spend by customers purchasing Apparel is **\$73** and the average spend on Apparel by all customers is **\$16**.

● HOMEWARES

11% of customers purchased Homewares, accounting for **9%** of total spend. The average spend across all customers at Australian Centres is **\$6** and the average spend on Homewares is **\$56** per customer purchasing only.

● BULKY GOODS

1% of customers purchased Bulky Goods whilst at Australian Centres, accounting for **1%** of total spend. The average spend by customers purchasing only is **\$50** and the average for all customers is **\$1**.

● GENERAL/LEISURE

25% of customers purchased General/Leisure goods whilst at Australian Centres accounting for **12%** of total spend. The average spend by customers purchasing only is **\$33** and the average for all customers is **\$8**.

● SERVICES

Services were purchased by **7%** of Australian Centres customers, accounting for **5%** of total spend. The average spend by customers purchasing only is **\$58** and the average spend by customers overall is **\$4**.

● AUSTRALIAN CENTRES: *How they spend*

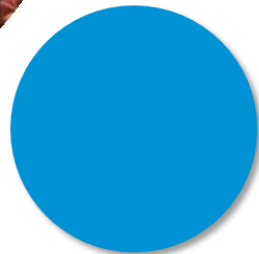
● PERCENTAGE OF SPEND AND AVERAGE SPEND BY GENDER

Females account for **72%** of customers at Australian Centres and **77%** of the spend.

Females also have a higher propensity to spend at **93%**, compared to Males at **87%**.

Females' average expenditure is considerably higher at **\$76**, compared to Males at **\$56**.

Gender	% of Customers	% of Spend	% of Customers Purchasing	Average Spend (All Customers)	Average Spend (Purchasing Customers Only)
Female	72%	77%	93%	\$76	\$82
Male	28%	23%	87%	\$56	\$65



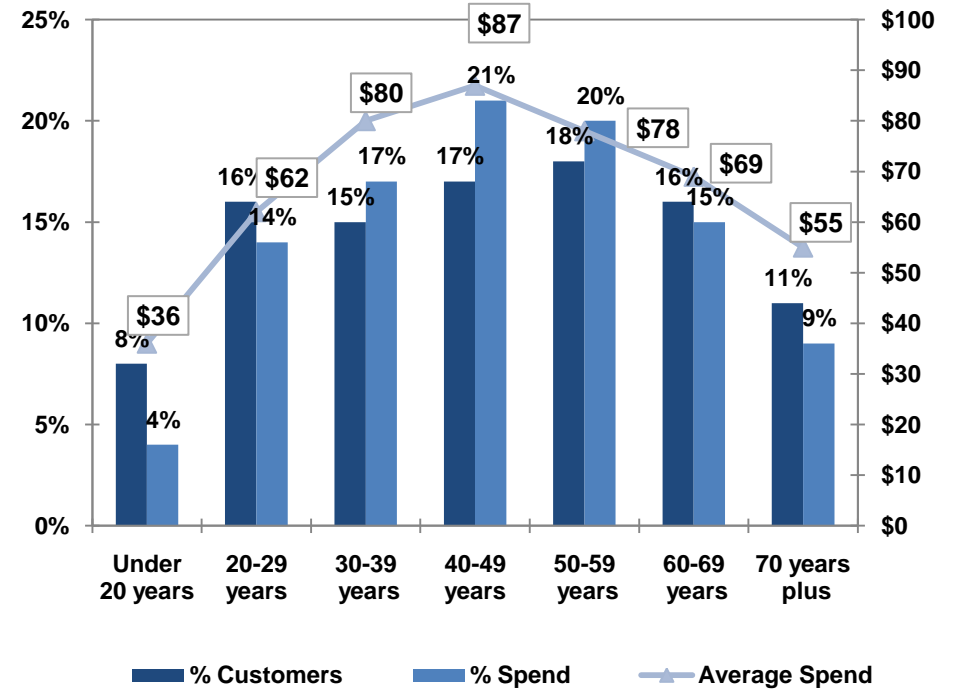
● AUSTRALIAN CENTRES: *How they spend*

● PROPOPORTION OF CUSTOMERS SPEND AND AVERAGE SPEND BY AGE

50-59 year old customers account for the highest proportion of customers at **18%** followed by **40-49** year old customers at **17%**.

The **40-49** year old age group also have the highest proportion of spend at **21%** and the highest average spend at **\$87**.

50-59 year old customers account for **20%** of the spend, with an average spend of **\$78**, while **20-29** year old customers account for **14%** of the spend with an average spend of **\$62**.



● AUSTRALIAN CENTRES: *How they spend*

● SPEND BY OCCUPATION

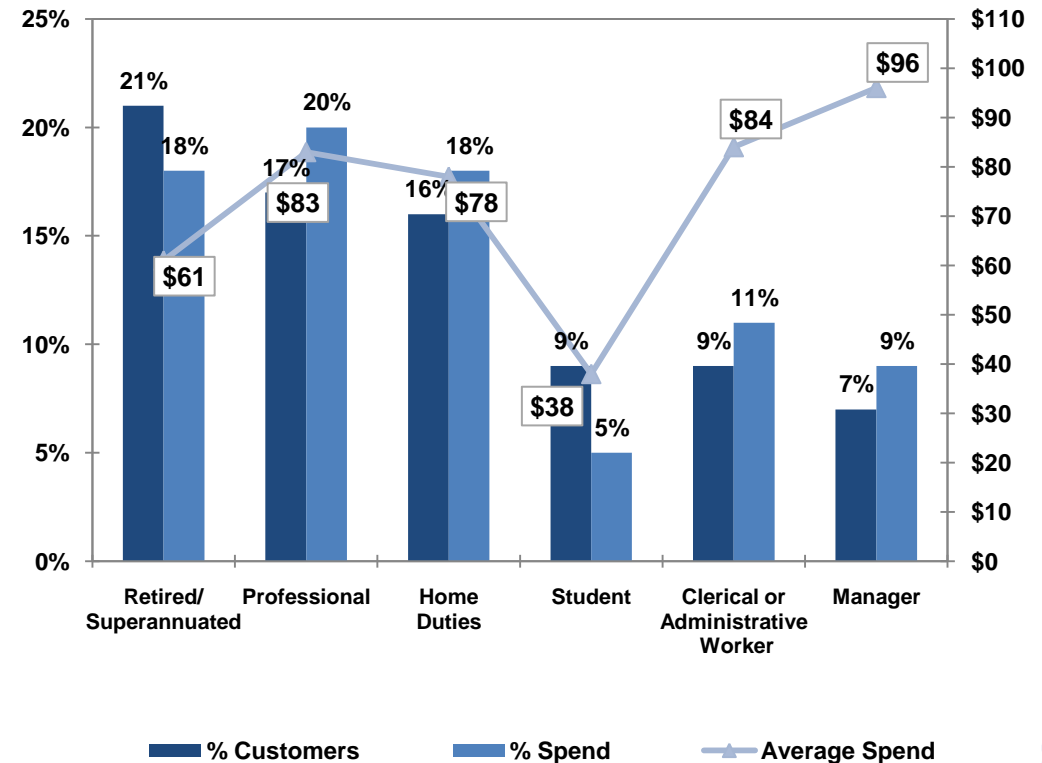
The highest average spend by occupation group is with customers in **managerial roles**, spending an average **\$96**. These customers account for **9%** of total spend and account for **7%** of all customers.

This was followed by customers in a **clerical or administrative role** with an average spend of **\$84**, accounting for **9%** of customers and **11%** of spend.

Customers in **professional roles** have an average spend of **\$83**, accounting for **17%** of customers and **20%** of total spend.

Customers who are undertaking **home duties** have a relatively high proportion of total spend at **18%**, with an average spend of **\$78** and account for **16%** of all customers.

Whilst **retired/superannuated** customers account for the higher proportion of customers at **21%**, they have an average spend of only **\$61** and account for **18%** of spend.



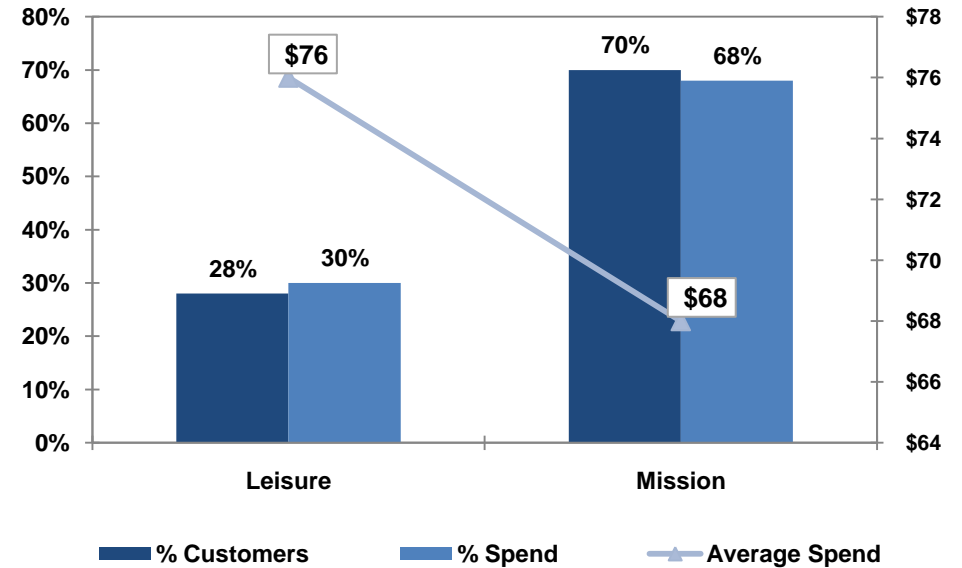
● AUSTRALIAN CENTRES: *How they spend*

● SHOPPING PATTERNS

28% of customers of Australian Centres described their shopping trip as a **leisure** shop, meaning shopping at a leisurely pace and taking their time and enjoying the experience. These customers account for **30%** of expenditure and have an average spend of **\$76**.

Conversely **mission** shoppers, customers who were at the centre for a specific purpose, account for **70%** of customers and **68%** of spend, with an average spend of **\$68**.

Leisure shoppers are spending **\$8** more on average than mission shoppers.



● AUSTRALIAN CENTRES: *How they spend*

● TIME IN CENTRE

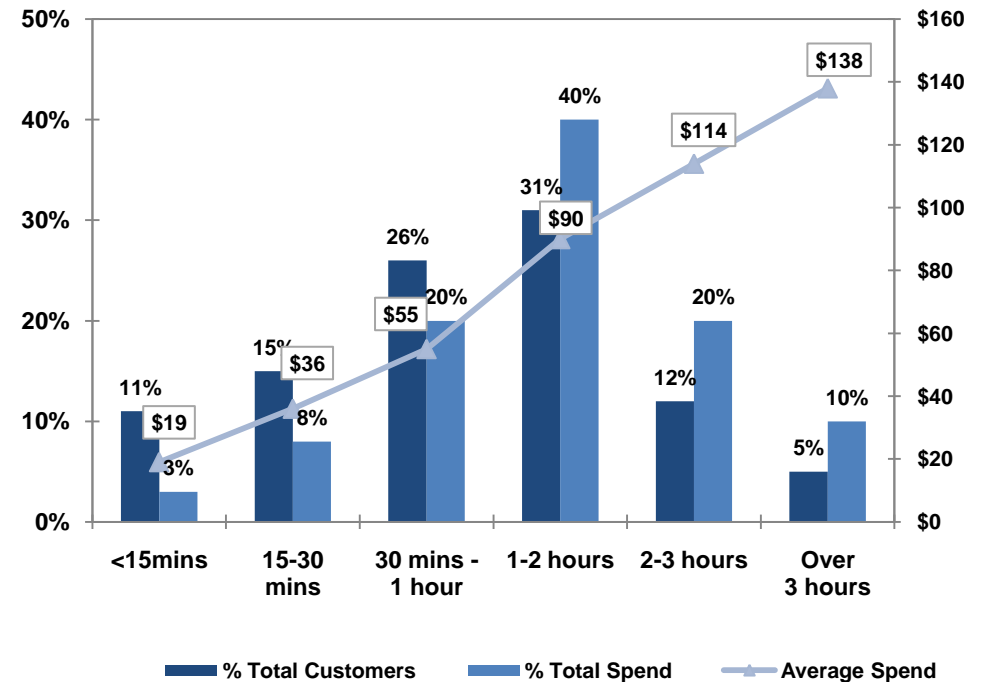
Expenditure is related to the amount of time spent in the Centre. The longer the customer stays at a shopping centre, on average, the more they spend.

Customers spending less than 15 minutes in the Centre have an average spend of **\$19**, compared to customers spending over three hours with an average spend of **\$138**. As expected, average expenditure increases as average time spent in the centre increases.

● REGRESSION ANALYSIS

When regression analysis is used to analyse spend versus time at Australian Centres, we find for every additional minute spent in the centre customers spend an additional **\$0.75** on average,

One minute more means about \$0.75 cents more on expenditure.



● AUSTRALIAN CENTRES: *Trade Areas*

● AUSTRALIAN CENTRE : TRADE AREAS

On average, 57% of customers of Australian Centres live in the Primary Trade Area.

26% reside in the Total Secondary Trade Area while 84% live in the Main Trade Area.

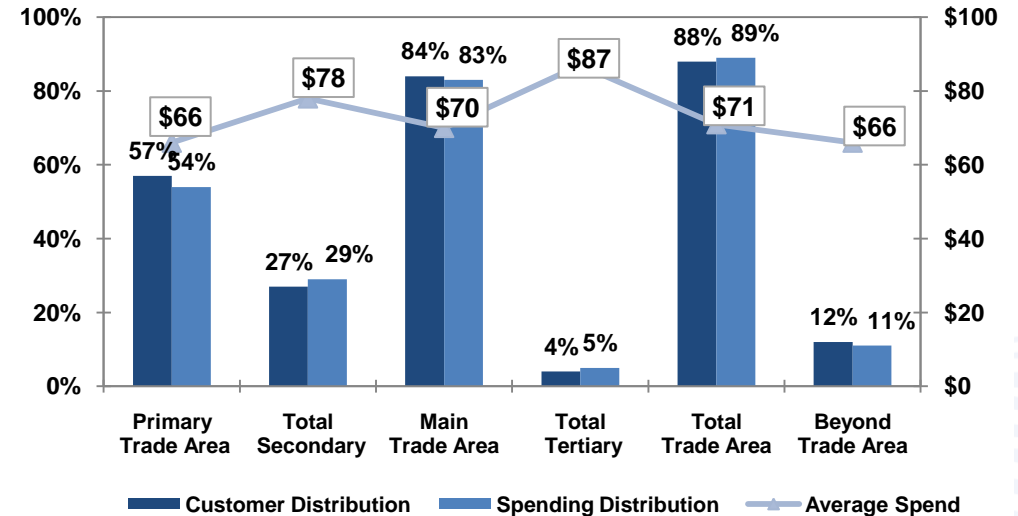
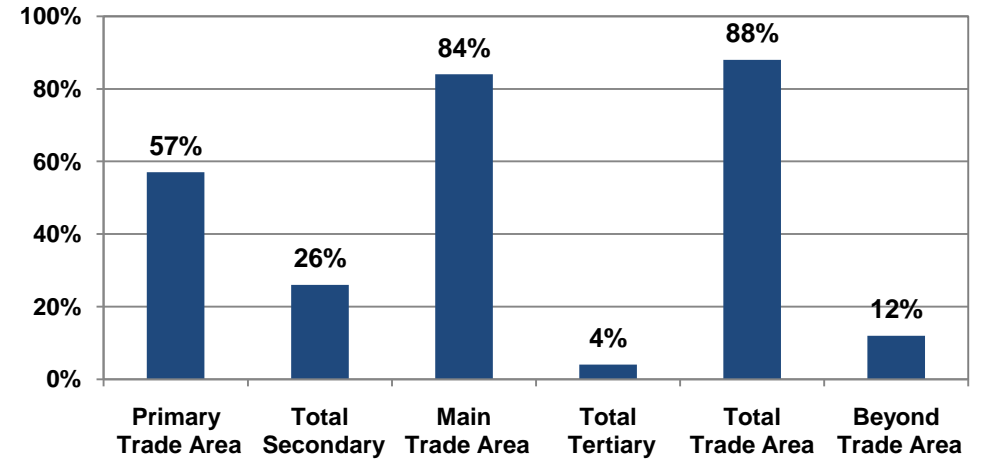
12% of Australian Centres customers reside Beyond the Trade Area.

● TRADE AREAS EXPENDITURE

The customers of Australian Centres who live in the Primary Trade Area make up 54% of expenditure and have an average spend of \$66.

Customers from the Total Secondary Trade Area have the highest average spend at \$78, accounting for 29% of expenditure.

The lowest average spend is from customers Beyond the Trade Area at \$66.



● AUSTRALIAN CENTRES: *What's important when shopping*

● IMPORTANCE RATINGS

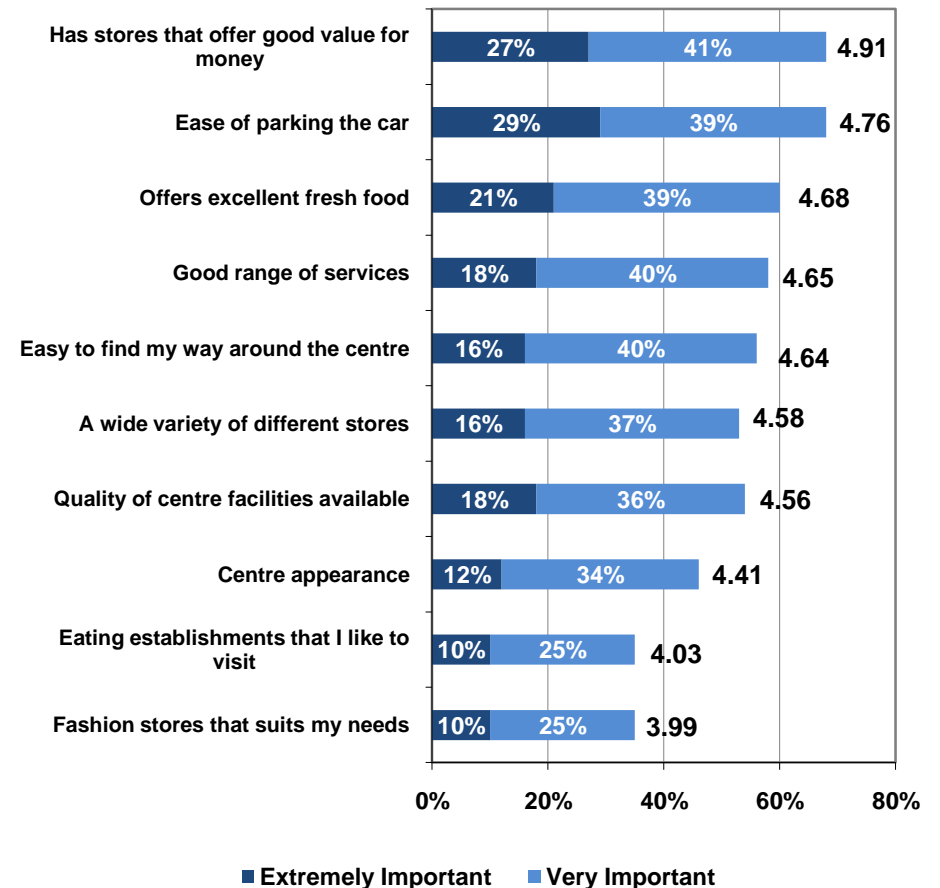
Customers at Australian Centres were asked to rate different aspects of shopping centres on a scale of 1 to 6, based on how important each attribute is to them when they shop.

Similar attributes were tested at the Australian Centres within the sample. A mean score for each attribute was derived to find out which attributes are the most important. A score of better than 3 indicates a positive response to that particular attribute.

Has stores that offer good value for money was rated the most important attribute by customers at Australian Centres, with a mean score of **4.91**.

● SIX POINT IMPORTANCE SCALE

Rating	Meaning
1	Not at all Important
2	Unimportant
3	Neither Important nor Unimportant
4	Important
5	Very Important
6	Extremely Important
n/a	Don't Know



● AUSTRALIAN CENTRES: *How centres perform*

● PERFORMANCE RATINGS

Customers were then asked to rate the same attributes on a scale of 1 to 6 to indicate the level of performance attained by Australian Centres for each attribute.

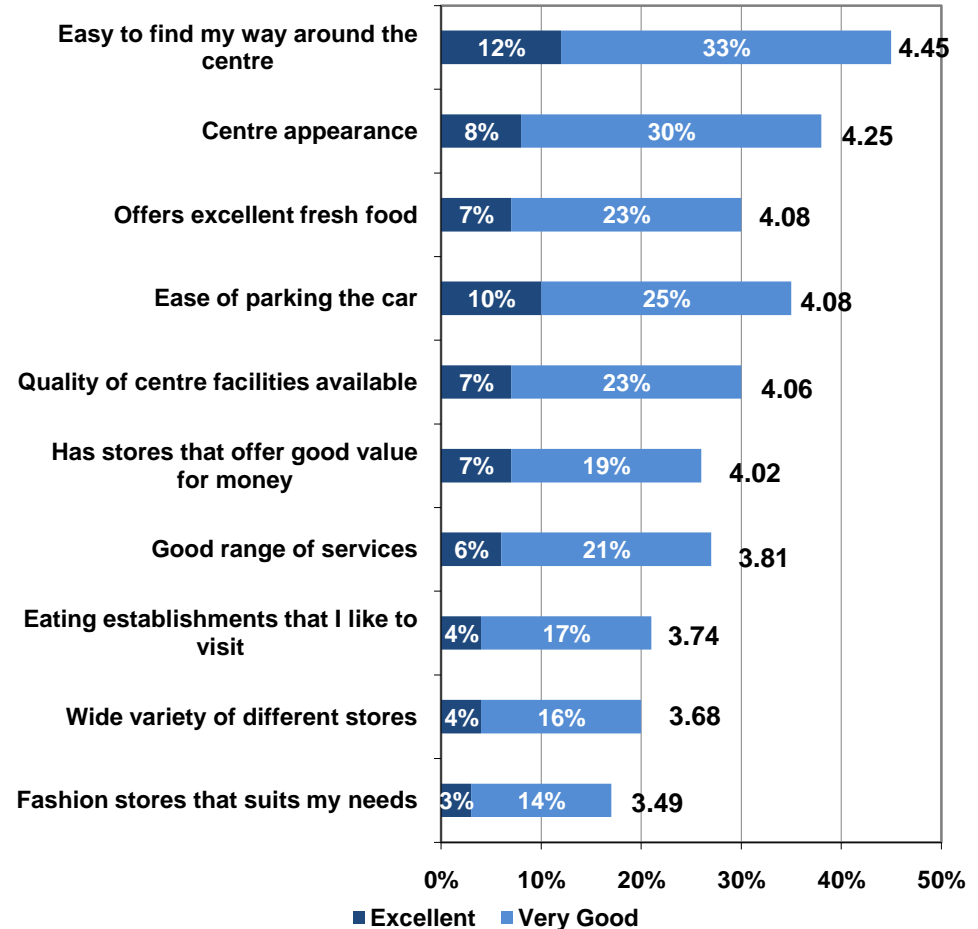
Again, a mean score for each attribute was derived to find out which attributes have the highest performance. A score of better than 3 indicates a positive response to that particular attribute.

Customers rated *easy to find my way around the centre* as the highest performing attribute, with a mean score of **4.45**.

This was followed by *centre appearance* at **4.25**.

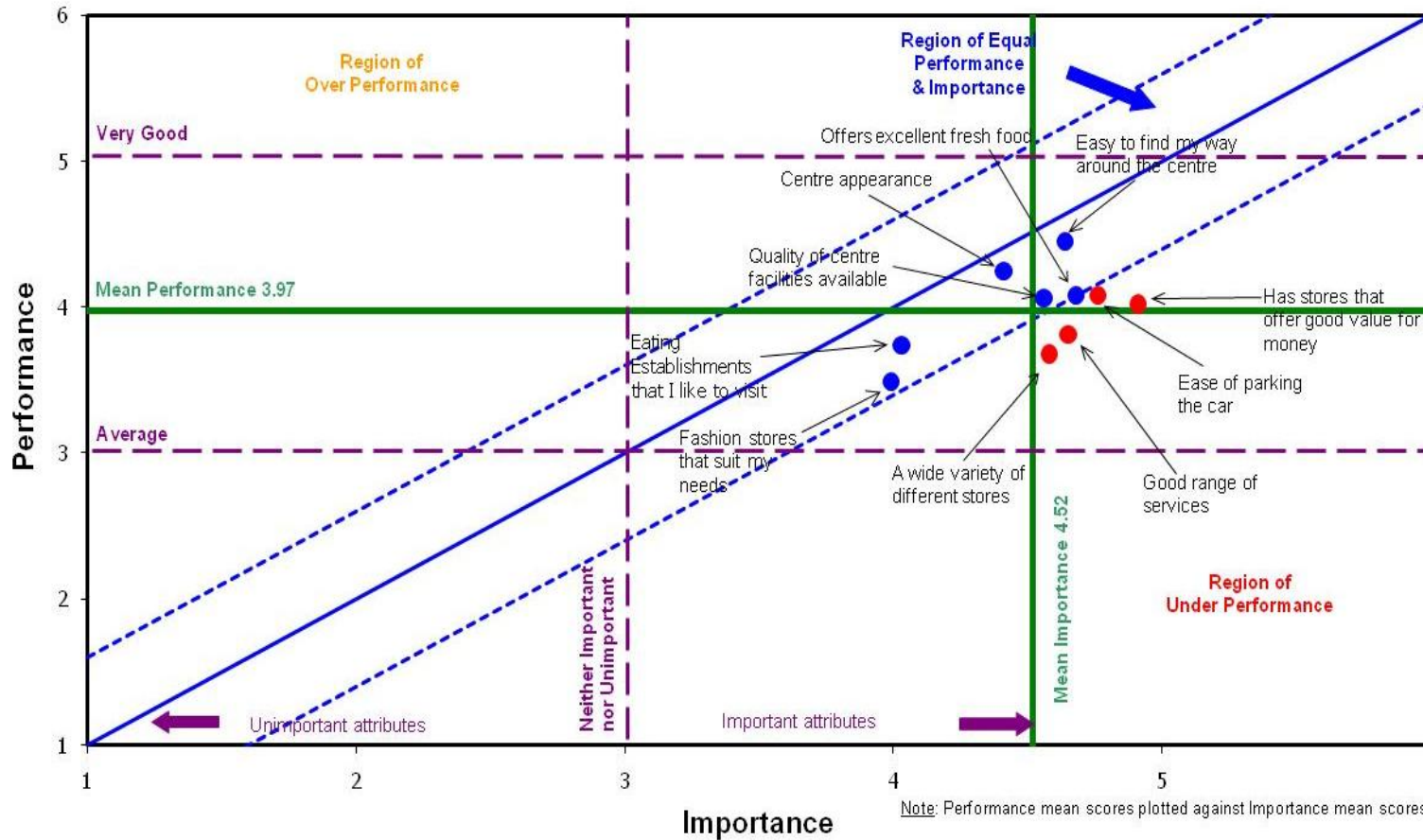
● SIX POINT PERFORMANCE SCALE

Rating	Meaning
1	Very Poor
2	Poor
3	Average
4	Good
5	Very Good
6	Excellent
n/a	Don't Know



● AUSTRALIAN CENTRES: *Gap Analysis*

● EVALUATION OF PERFORMANCE AGAINST IMPORTANCE



The attributes meeting general customers' expectations include:

- easy to find my way around the centre
- offers excellent fresh food
- centre appearance
- quality of centre facilities available
- eating establishments that I like to visit
- fashion stores that suit my needs

Attributes falling outside the region of equal importance and performance include:

- has stores that offer good value for money
- ease of parking the car
- good range of services
- a wide variety of different stores

The intersection of the mean importance and performance for Australian Centres is just inside the blue zone of meeting customers' expectations.

Note: See Definition of Terms for Gap Analysis Methodology

● AUSTRALIAN CENTRES: *How centres perform overall*

● OVERALL PERFORMANCE

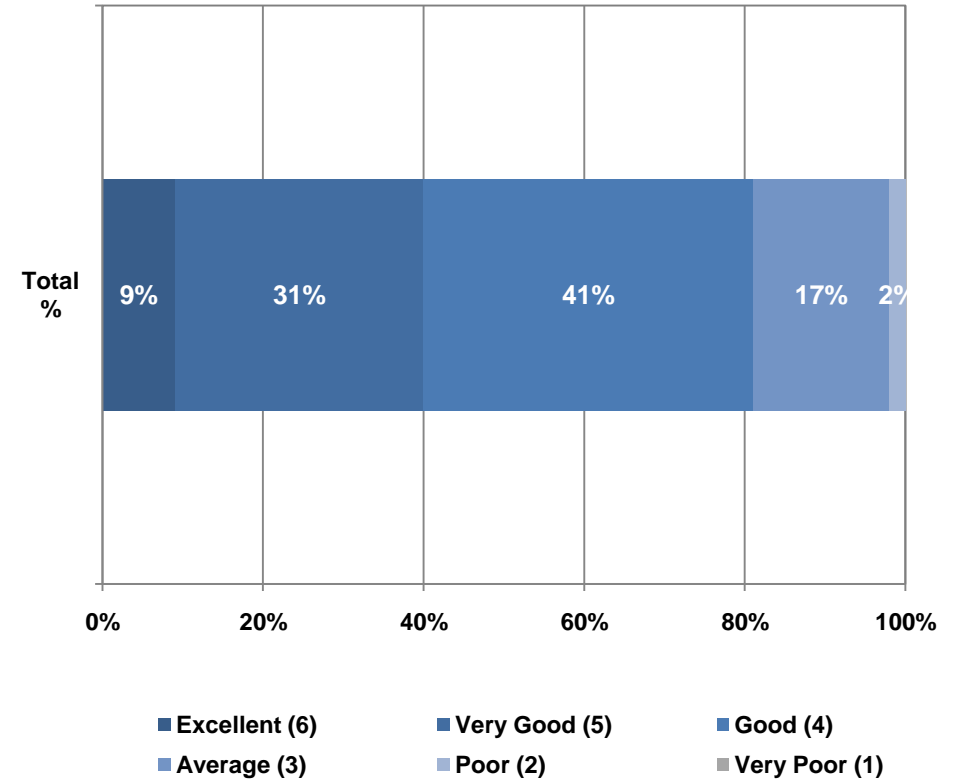
Overall customers rated Australian Centres at **4.27** on a six point scale as **Good to Very Good**.

9% of customers rate Australian Centres as Excellent and a further **31%** rate them as Very Good.

Only **2%** of customers rate Australian Centres as Poor to Very Poor.

● SIX POINT OVERALL PERFORMANCE SCALE

Rating	Meaning
1	Very Poor
2	Poor
3	Average
4	Good
5	Very Good
6	Excellent
n/a	Don't Know



● AUSTRALIAN CENTRES: *Shopping centre loyalty*

● CUSTOMERS USE OF CENTRES FOR FOOD SHOPPING

Customers were asked to name the Centre where their main food and grocery shopping is undertaken.

52% of customers use the Australian Centres that they were interviewed in for their regular food shopping.

48% of customers use another centre for their regular food shopping.

● CUSTOMERS USE OF CENTRES FOR CLOTHES, HOMEWARES AND GIFT SHOPPING

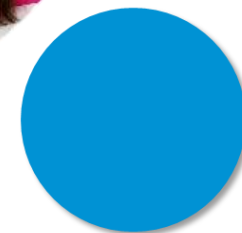
Customers were asked to identify which centres they use most often for clothing, homewares and gift shopping; that is non-food shopping.

Customers indicated that 43% use the Australian Centre they were interviewed in for their regular non-food shopping.

A majority of **57%** use another centre of their regular non-food shopping.

● ONLINE SHOPPING

7% of Australian Centres customers have shopped online in the past six months while 93% have not.



● AUSTRALIAN CENTRES: *Centre performance versus competition*

● PERFORMANCE RATINGS COMPARED TO COMPETITION

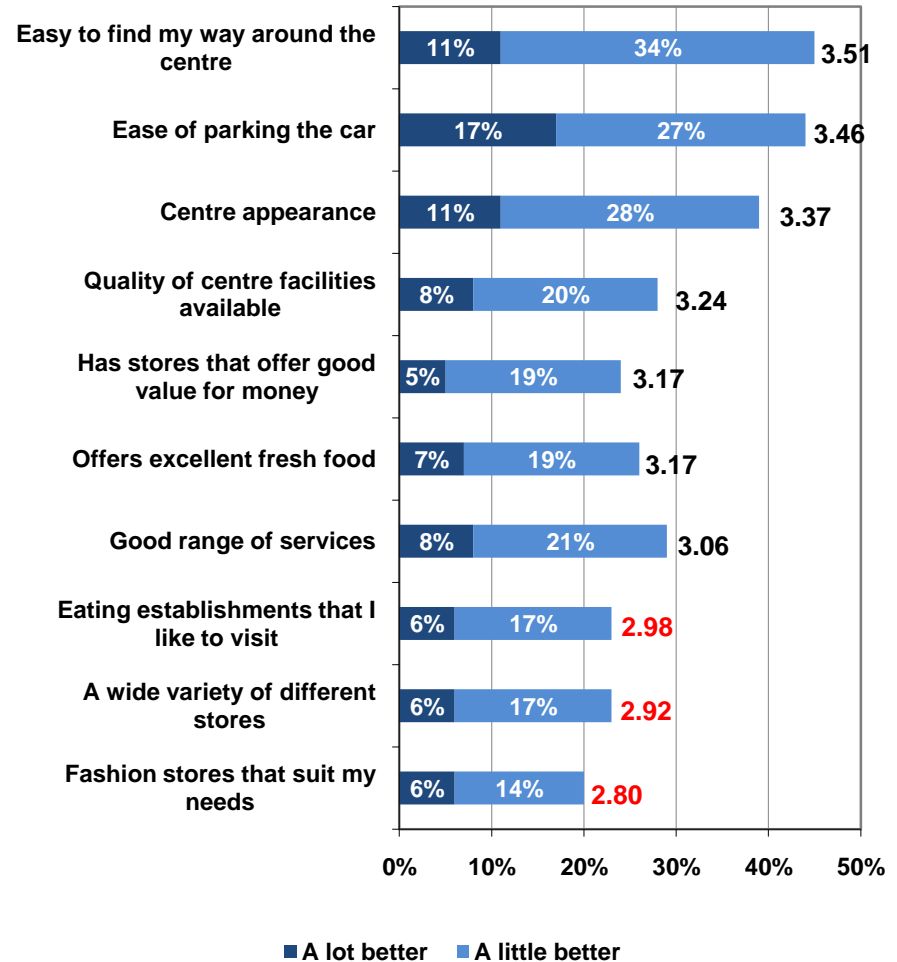
Customers were asked to rate the attributes of Australian Centres in comparison to other centres where they shop. A 5 point scale was used. A mean score for each attribute was derived to find out which attributes have the highest performance. A score of better than 3 indicates the attribute is outperforming the competition generally.

Customers rated *easy to find my way around the centre* as the highest performing attribute of the centre compared to other centres at **3.51**. This was followed by *ease of parking the car* and *centre appearance* at **3.46** and **3.37** respectively, a rating of about the same to a little better as the competition.

The poorest rating attribute of Australian Centres when compared to other centres was *fashion stores that suit my needs* at **2.80**, a little worse than the competition.

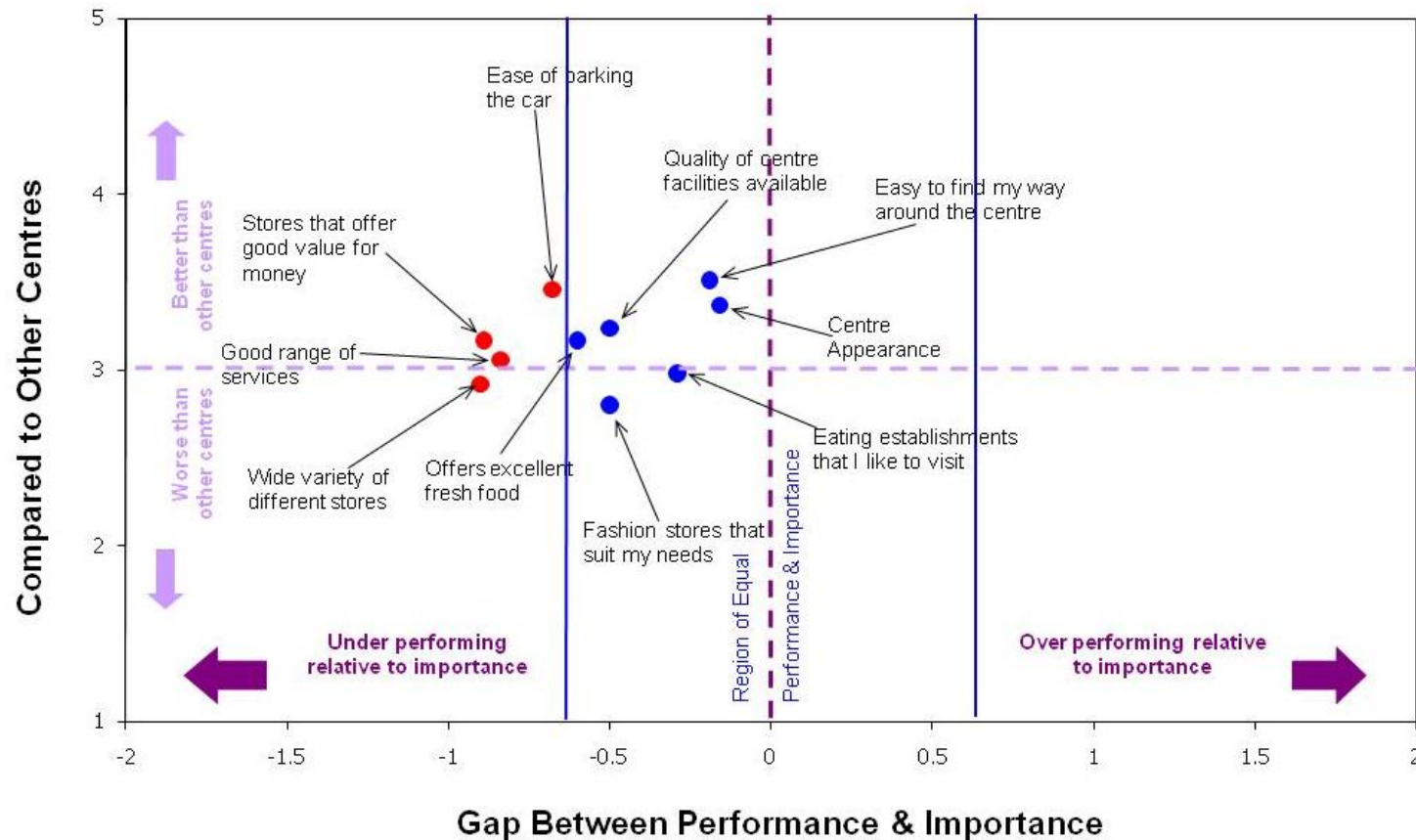
● FIVE POINT SCALE

Rating	Meaning
1	A lot worse
2	A little worse
3	About the same
4	A little better
5	A lot better
n/a	Don't Know



● AUSTRALIAN CENTRES: *Competition Gap Analysis*

● GAP BETWEEN PERFORMANCE AND IMPORTANCE COMPARED TO THE COMPETITION



The attributes currently meeting customers' expectations and outperforming the competition include:

- quality of centre facilities
- easy to find my way around the centre
- centre appearance.
- offers excellent fresh food

Attributes that outperform the competition but do not meet current customers' expectations include:

- good range of services
- stores that offer good value for money
- ease of parking the car

The attributes, eating establishments that I like to visit and fashion stores that suit my needs meet current customers' expectations but both underperform compared to the competition.

Whilst the attribute wide variety of different stores fails to meet current customers' expectations, this attribute also underperforms compared to the competition.

Note: See Definition of Terms for Competition Gap Analysis Methodology

● AUSTRALIAN CENTRES: *Overall centre performance versus competition*

● OVERALL RATING COMPARED TO THE COMPETITION

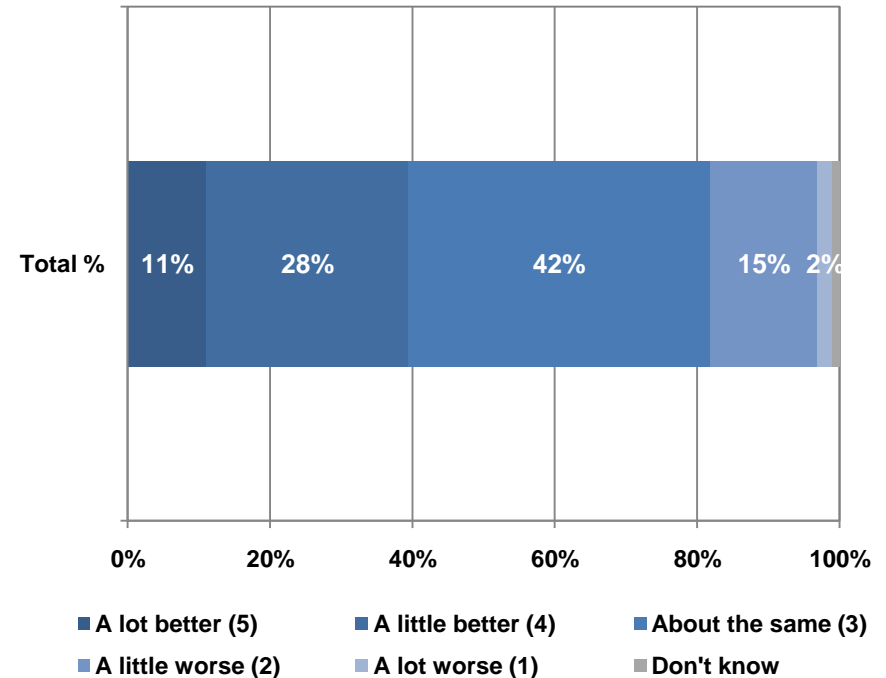
Customers were also asked to rate Australian Centres overall in comparison to other centres where they shop. A 5 point scale was used.

Overall, Australian Centres achieved a score of **3.33** from customers indicating that customers think their centre is **about the same to a little better** than others that they shopped at.

11% of customers believed their Australian Centres was a lot better than other shopping centres. **28%** of customers thought that their centre was a little better while another **42%** of customers stated that they were all about the same.

● FIVE POINT SCALE

Rating	Meaning
1	A lot worse
2	A little worse
3	About the same
4	A little better
5	A lot better
n/a	Don't Know



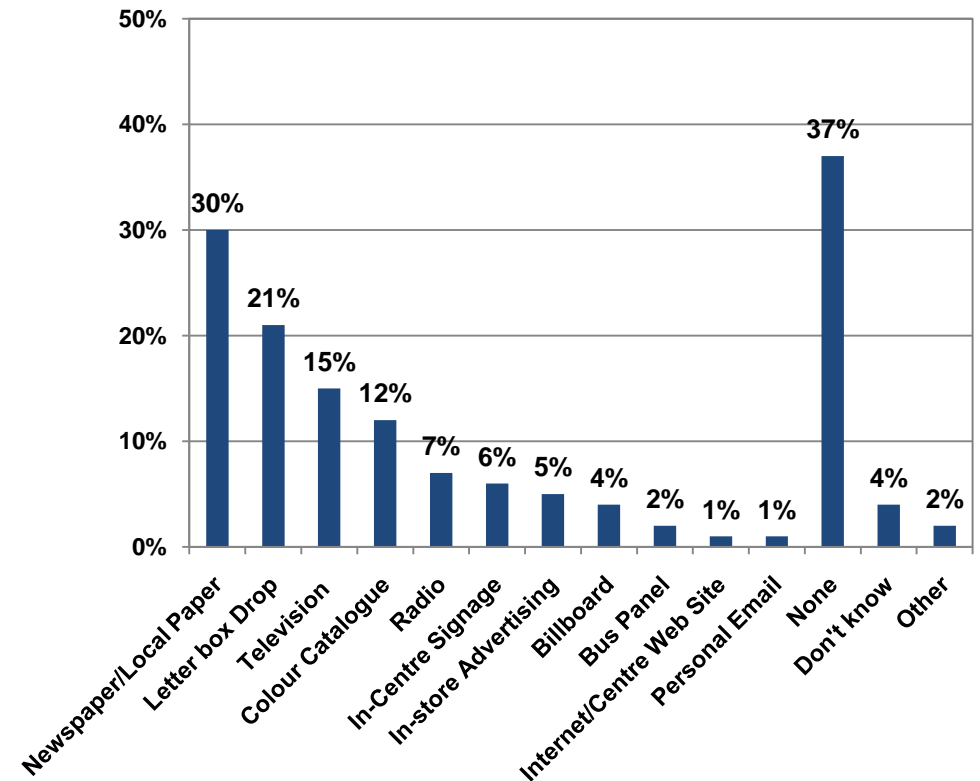
● AUSTRALIAN CENTRES: *How they hear about what's going on*

● MARKETING AWARENESS

Customers were asked to nominate in which media they had seen the subject Shopping Centres mentioned. It is important to note that customers do not clearly discriminate retailer advertising with Centre advertising. For this reason media in which Shopping Centre Marketing has not been active will be mentioned by customers due to Centre retailer activity in this media.

Overall newspaper/local paper, letter box drop and Television received the highest awareness by customers of Australian Centres at **30%**, **21%** and **15%** respectively. This was followed by colour catalogue and radio at 12% and 7%.

37% of customers of Australian Centres had no awareness of advertising marketing by Australian Centres and a further **4%** of customers did not know.



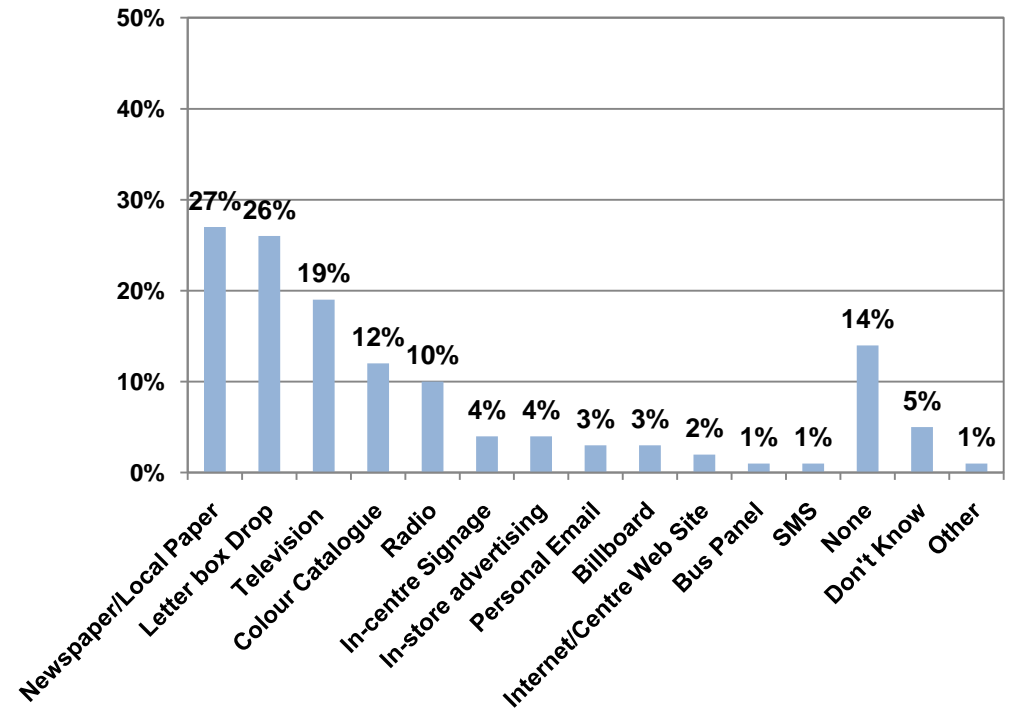
● AUSTRALIAN CENTRES: *How they prefer to hear about what's going on*

● MARKETING PREFERENCE

Customers were asked about their preferences for informing them about events and specials at Australian Centres.

Newspaper/local paper and letter box drop were rated the most preferred by customers of Australian Shopping Centres at **27%** and **26%** each. This was followed by Television at 19%, Colour Catalogue at **12%** and Radio at **10%**. **14%** of customers prefer no advertising at all.

The overall gap between awareness and preference by customers of Australian Centres is 23%, with 37% of customers at Australian Centres stating they are not aware of marketing for Australian Centres and 14% of customers stating they have no preference.



● AUSTRALIAN CENTRES: *Definition of Terms*

● AVERAGE AGE

Average age of customers interviewed. Note: only customers of 15 years and over can be interviewed in shopping centres. As a result the Australian Bureau of Statistics' average age statistic is not directly comparable to the average age calculation applied here.

● SINK/DINK

SINK = Single income no kids
DINK = Double income no kids, empty nester households.

● MISSION SHOPPING

Customers who were at the centre for a specific purpose, moved quite quickly through the centre, did their shopping, and are now leaving.

● LEISURE SHOPPING

Customers who shop at a more leisurely pace and take their time and enjoy the experience.

● EXIT SURVEY

Customers are interviewed about their shopping patterns and experiences when they have completed their shopping and are leaving the centre.

● INTERCEPT SURVEY

Customers are interviewed about their shopping patterns and experiences while still in the centre and may continue their shopping after the interview. They may be at the beginning, in the middle or at the end of their shopping trip.

● OUTLIERS

The expenditure data has been adjusted for outliers.

● GAP ANALYSIS

The gap analysis illustrates the gap in customer ratings between importance and performance for that centre. The X axis rates the importance of different attributes on a six point scale. A score of 3 indicates the attribute to customers is neither important nor unimportant, indicated by the magenta dotted line perpendicular to the X axis.

Any attribute plotted left of this line is considered an unimportant attribute and any attribute plotted right of this line is considered as an important attribute. The mean importance line for all attributes rated by customers is indicated by the green line perpendicular to the X axis.

The Y axis rates the performance of the centre on the same attributes on a similar 6 point scale. A score of 3 represents average performance indicated by the magenta dotted line perpendicular to the Y axis. The mean performance line for all attributes rated by customers is indicated by the green line perpendicular to the Y axis.

The blue diagonal line on the chart illustrates the region of equal importance and performance. Attributes which are blue are generally meeting customers' expectations. Attributes which fall outside this region, which are red, are not meeting current customers' expectations.

If the intersection of the green mean importance line and mean performance line intersect in the blue region then the centre is meeting current customers' expectations.

● COMPETITION GAP ANALYSIS

In the competition gap analysis, the X axis plots the gap between customer importance and performance rating on each attribute. The magenta line perpendicular from the X axis on 0, indicates equal performance and importance.

Any attribute plotted left of this line indicates under performance relative to importance, whilst any attribute plotted right of 0 indicates the region of over performance relative to importance. Red attributes indicate underperformance compared to customer expectations. The Y axis rates the attributes compared to other centres assessed for the same attributes on a performance scale of 1 to 5.

3 on the Y axis indicates the attributes perform about the same as the subject centre as at other centres. Attributes above this line indicate they outperform the competition and attributes below this line underperform the competition.

● AUSTRALIAN CENTRES: *Commodity Groups*

● FOOD RETAIL

Includes all food, groceries, tobacco and liquor purchases.

● FOOD CATERING

Includes all take-away and meal purchases including at cafes and restaurants.

● APPAREL

Includes all clothing, footwear, jewellery and accessories purchases.

● HOMEWARES

Includes all household, TV/sound, small electrical and manchester purchases.

● BULKY GOODS

Includes all furniture, floor coverings, hardware and large electrical purchases.

● GENERAL/LEISURE

Includes all books, music, sports, toys, chemist, and newsagency purchases.

● SERVICES

Includes all hair, optician, film processing, dry cleaning, video hire and repair purchases.

● AUSTRALLIAN RETAIL

Includes all retail commodity purchases listed above.



● DIRECTIONAL INSIGHTS: *Profile*

Directional Insights is a full service Market Research Company specialising in Retail, Shopping Centre and Property Research.

We have extensive experience in managing customer survey studies, telephone surveys, on-line surveys, focus groups, in-depth interviews and executive interviews.

With over **90,000+** customers interviewed, the team has experience in researching **over 100 shopping centres**, retail, residential, entertainment, and leisure facilities in Australia and New Zealand, ranging from Super Regionals to Neighbourhood Centres, to recreational precincts and even pubs.

At Directional Insights, we believe our role is to guide and advise throughout a project to ensure the research delivers great opportunities into commercial realities.

Our clients are spread across Australia and include some of the top property groups and shopping centre owners and managers.



● COMPLETE RESEARCH DESIGN AND MANAGEMENT

- Consumer Research
- Portfolio Research Management & Development
- Research Needs Identification
- Research Planning, Implementation & Project Management

● RESEARCH METHODOLOGIES

- Customer Exit and Intercept Surveys
- Telephone Surveys
- Focus Groups
- On-line Surveys
- Executive Interviews (including Business to Business)
- Voxpop Video Research
- Segmentation Studies

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