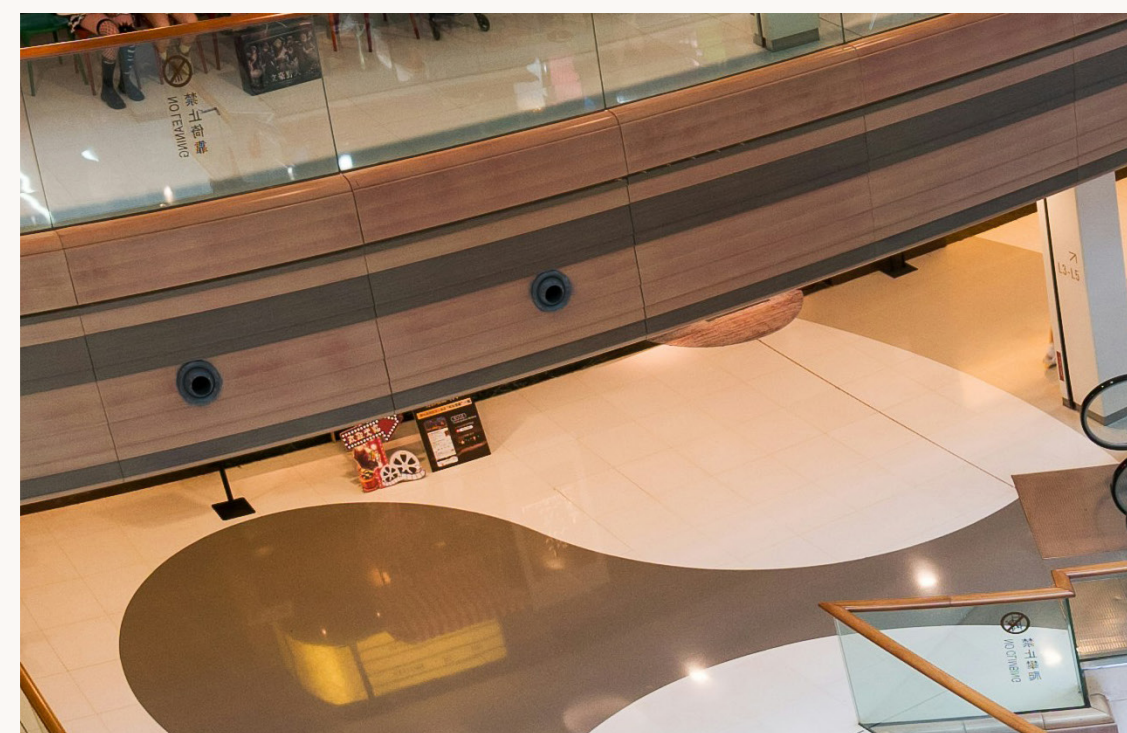


Shopper Sentiment 2025: What Drives Satisfaction in Australian Retail Centres

2025 Benchmarking Report

October 2025



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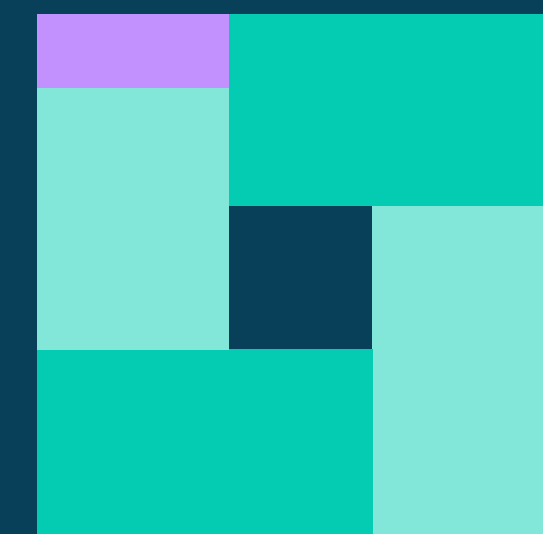
Lessons from the
Leading Centres

01

Research Methodology



How we measured sentiment in 2025:
23,606 paid responses across 240 centres,
using our NPS+ framework, touchpoint and
theme diagnostics, verbatim comments and
light profiling. Australian margin of error is
<±3pp; results reflect shoppers' most recent
visit to their preferred centre.



Research Methodology

Purpose and Scope

Since 2019, Prescient Research has tracked the performance of Australian retail centres through customer sentiment. The 2025 Shopper Sentiment Report collates over 23,600 paid responses gathered online from shoppers across Australia. Results are designed to benchmark centre performance at a national level and to highlight differences by centre type, location, and visit purpose.

Sample and coverage

Fieldwork included responses from 240 centres, covering a broad mix of Super-regional, Regional, Sub-regional and Neighbourhood assets. Each respondent evaluated their ‘preferred centre’ based on their ‘most recent visit’, ensuring recency and reducing recall bias. Cumulatively, the program has collected more than 96,000 shopper responses since inception, enabling robust year-on-year comparisons.

Questionnaire Design

The survey takes approximately five minutes to complete and balances consistency (for trend benchmarking) with limited annual updates to reflect emerging retail topics. Core measures include satisfaction, loyalty, advocacy, fulfilment and preference, supported by touchpoint diagnostics (e.g. retail mix, amenities, access, cleanliness, service) and open-ended feedback. Question wording is standardised to allow direct comparison between centres and years.

Analysis and error

Unweighted totals are shown unless noted; where weighting is used (e.g. by state or centre type) it is specified on the page. With $n=23,606$ at the national level, the maximum margin of error is under ± 3 percentage points at the 95% confidence level; margins are wider for sub-groups and individual centres.

23,606
Responses

240
Centres

100%
Paid responses

<3%
Margin of error

5 minutes
Duration of survey

Definitions

SIZE DEFINITIONS

01

Super Regional

The largest centres, 85,000+ sqm, with a broad retail, dining, and entertainment mix, including flagship stores

02

Regional

Large centres, 30,001–85,000 sqm, featuring diverse retail, strong anchors, and leisure options

03

Sub-Regional

Medium-sized hubs, 15,001–30,000 sqm, serving as primary shopping destinations with national and local retailers

04

Neighbourhood

Smaller centres, under 15,000 sqm, focused on everyday brands, convenience, and local services

CATEGORY DEFINITIONS

05

Preferred Centre

The centre a shopper nominates as their ‘preferred’ retail destination.

06

Leading Centre

The top quartile of centres in Australia based on NPS+ performance

07

Australian Benchmark

The average score of all responses for all Australian retail centres

08

High Value Customers (HVCs)

Customers in the top two spend brackets and visitation frequency

What we measure.

Net Promoter Score Plus (NPS+).

This section explains the core sentiment framework we use to benchmark retail centres. We apply an enhanced Net Promoter Score (NPS) tailored to physical places, so results translate directly into centre-level actions and year-on-year tracking.

NPS Score = % Promoters – % Detractors



Net Promoter Score (NPS) was designed for fast moving consumer goods. It measures the percentage of customers rating their likelihood to recommend a company, a product, or a service to a friend or colleague.

Net Promoter Score Plus (or NPS+) is a more holistic measure designed by us specifically for physical places. It builds on traditional advocacy (NPS) with loyalty, satisfaction and experience measures linked to actionable business drivers.

What we measure.

Net Promoter Score Plus (NPS+).

Respondents rate five single-item statements – Satisfaction, Fulfilment, Loyalty, Advocacy and Preference – on a 0–10 scale, which are combined into each centre’s NPS+ performance. Alongside these, we collect brief open-ended comments and light behavioural/demographic profiling to help explain the scores.

Satisfaction

My most recent visit to [your centre] was satisfying.

Fulfilment

My most recent visit to [your centre] fulfilled my needs.

Loyalty

I am likely to return to [your centre] in the future.

Advocacy

I am likely to recommend [your centre] to family, friends and colleagues.

Preference

I think [your centre] is better than similar sized shopping centres I have visited.

= Your centre’s NPS+ performance

What we measure.

Touchpoints and themes.

Beyond headline sentiment, shoppers assess specific touchpoints and experience themes that most influence the visit (e.g. cleanliness, service, design, parking). These diagnostics, together with open-ended feedback and basic profiling, identify where to focus to lift sentiment and performance.

13 customer retail centre touchpoints.

1. Parking
2. Entryways
3. Inside the centre
4. Inside the stores
5. Food areas
6. Play areas
7. Toilets
8. Parents' rooms
9. Seating areas
10. Entertainment and Leisure
11. Activations and Promotions
12. Digital services
13. Customer service

6 experience retail centre themes.

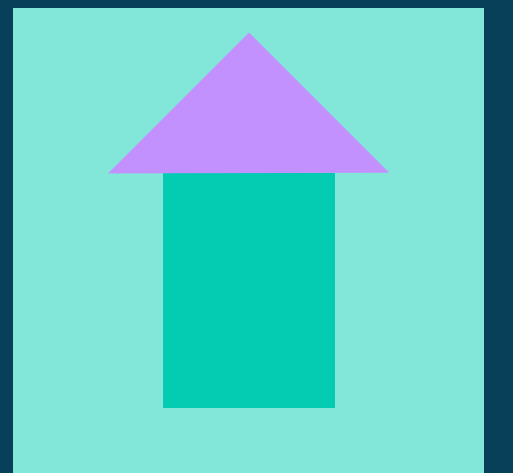
1. Service
2. Cleanliness
3. Safety
4. Maintenance
5. Design
6. Experience

02

Key Insights and Observations



Sentiment holds at a high base (national NPS+ up), with fewer detractors and a larger 7–8 ‘moveable middle’. The preference gap remains wide, families and retirees lift, and larger formats regain momentum while neighbourhoods cool from last year’s peak.



Executive Summary

01

Sentiment holds at a high base

Australian retail centre Net Promoter Score Plus improves to +30 from +26. The share of detractors declines from 20 per cent to 15 per cent, while promoters dip slightly from 46 per cent to 44 per cent. More shoppers now sit in the seven–eight band, creating a clear conversion opportunity.

04

Who is most satisfied shifts

Shoppers aged 30 to 44 now lead at +36, with 45 to 64 also improving and 65 and over rebounding from +9 to +25. Eighteen to twenty-nine softens from +30 to +24, pointing to the need for stronger value cues and convenience for younger visitors. Households with children and multi-adult households lift, and retirees move back into positive territory.

02

Preference is the performance engine

Shoppers at their preferred centre record +36 on Net Promoter Score Plus, compared with –15 at non-preferred centres – a 51-point gap. The quickest route to conversion is visible upgrades to parking, toilets, entryways, digital services and dwell spaces such as play and seating, where satisfaction differences are largest.

05

What is improving versus softening

Dwell and digital touchpoints improve while centre fundamentals ease back, including entrances, the experience inside the centre and inside stores, and toilets. The Safety theme records the largest decline, particularly car parks and parents' rooms, and is weaker for women, younger visitors and non-English speakers.

03

Scale regains momentum

Larger formats strengthen. Regional and Super Regional centres rise to +32 and +34 respectively, reflecting renewed appeal in variety, amenity and experience depth. Sub-regional edges up to +28, while Neighbourhood eases from last year's peak to +31 yet remains clearly positive.

06

The 2025 playbook for growth

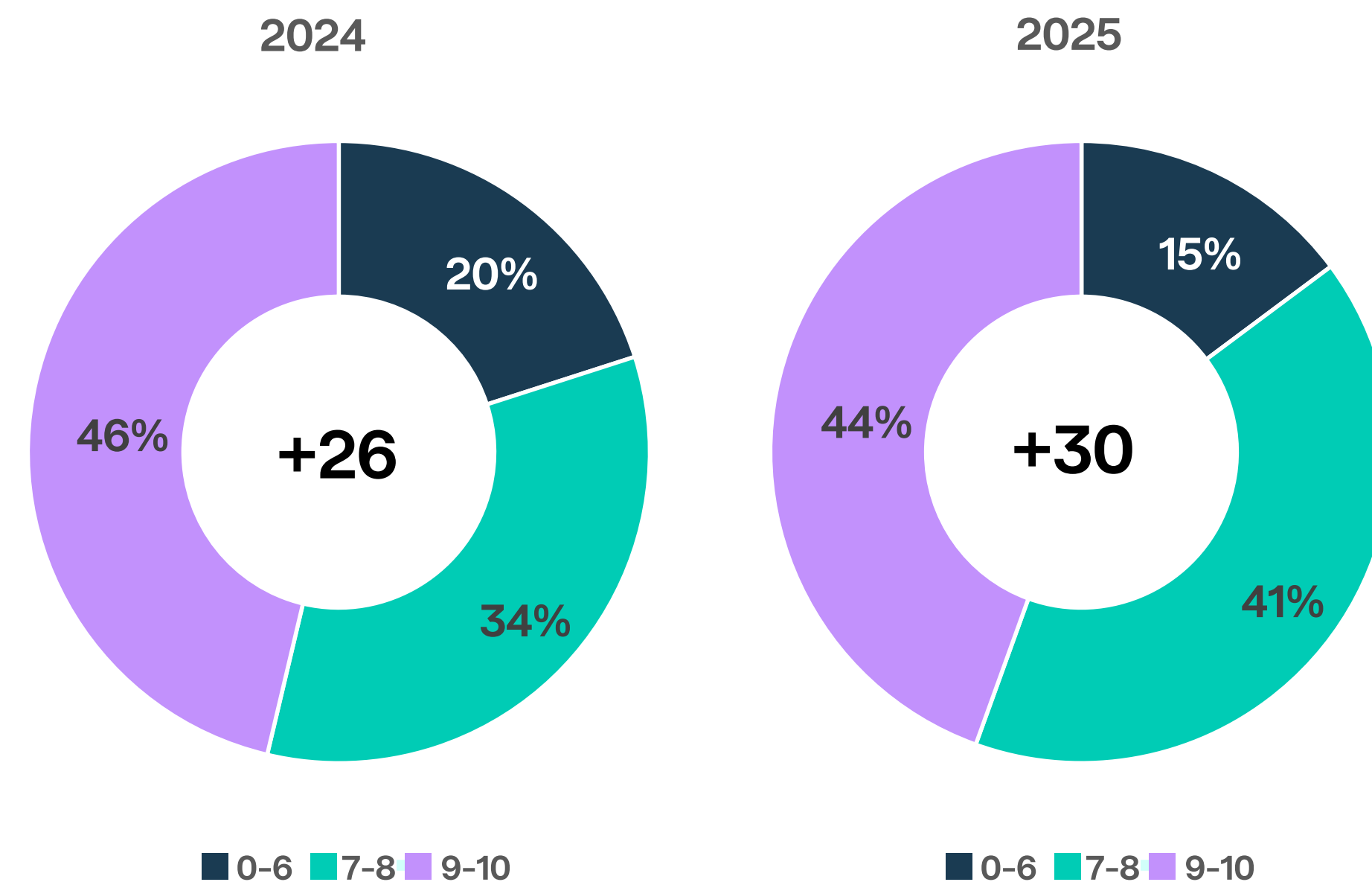
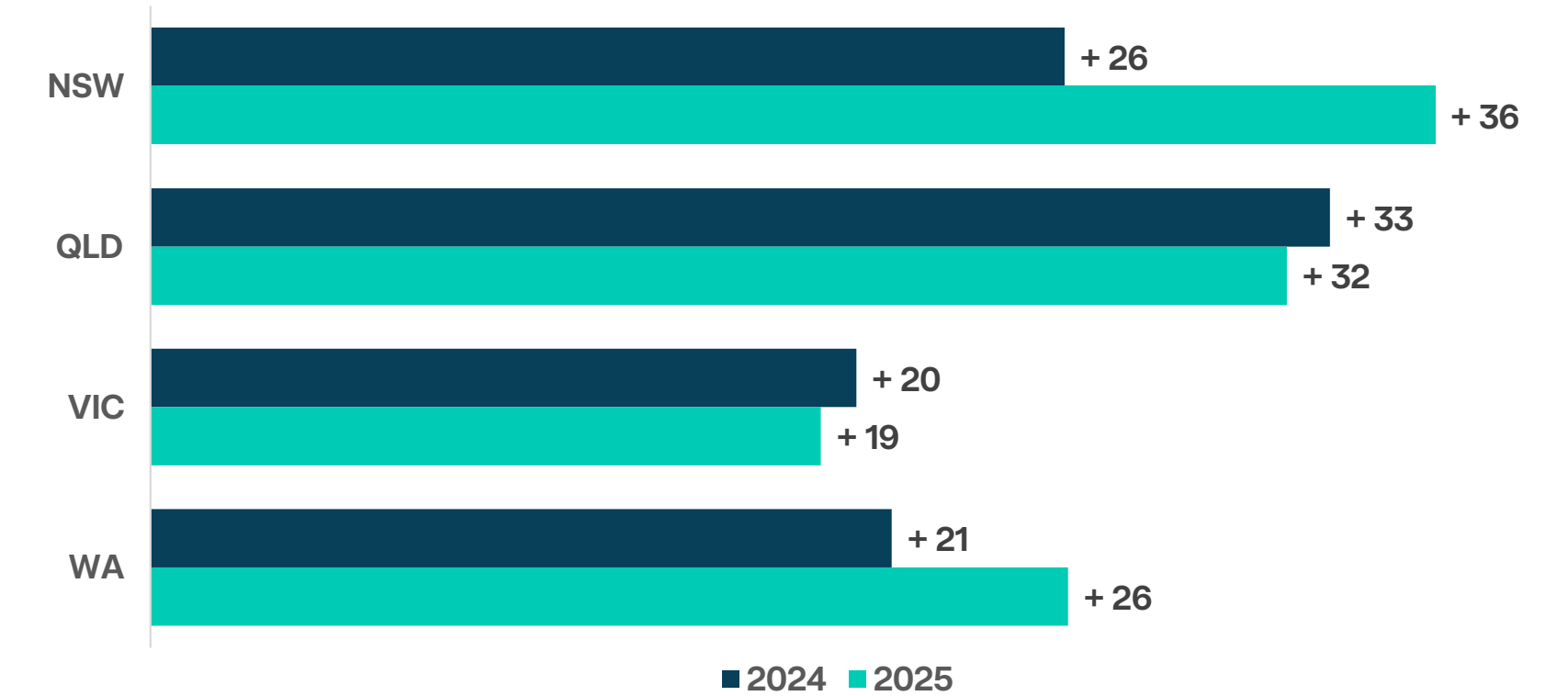
Lift sentiment and spend by fixing fundamentals first (lighting and sightlines, cleanliness cadence, minor repairs, clear wayfinding). Win preference with targeted upgrades to parking, toilets, entryways, digital and dwell comfort to convert occasional visitors. Reduce detractors with fewer, better-delivered activations and stronger car-park safety and staff visibility.

Shopper sentiment stays strong with a year on year lift.

Australian retail centre NPS+ improves to +30 (from +26 in 2024), reflecting a five-point drop in detractors (20% down to 15%) despite a slight softening in promoters (46% down to 44%). The distribution skews positively with more fence-sitters (7–8: 34% up to 41%) and fewer negative experiences, pointing to resilient advocacy through cost-of-living pressure.

By state, NSW and WA strengthen (+36, +26), while QLD (+32) and VIC (+19) hold close to last year. The story is stability at a high base, primed for centre-level gains.

NPS+ Comparison 2024 to 2025

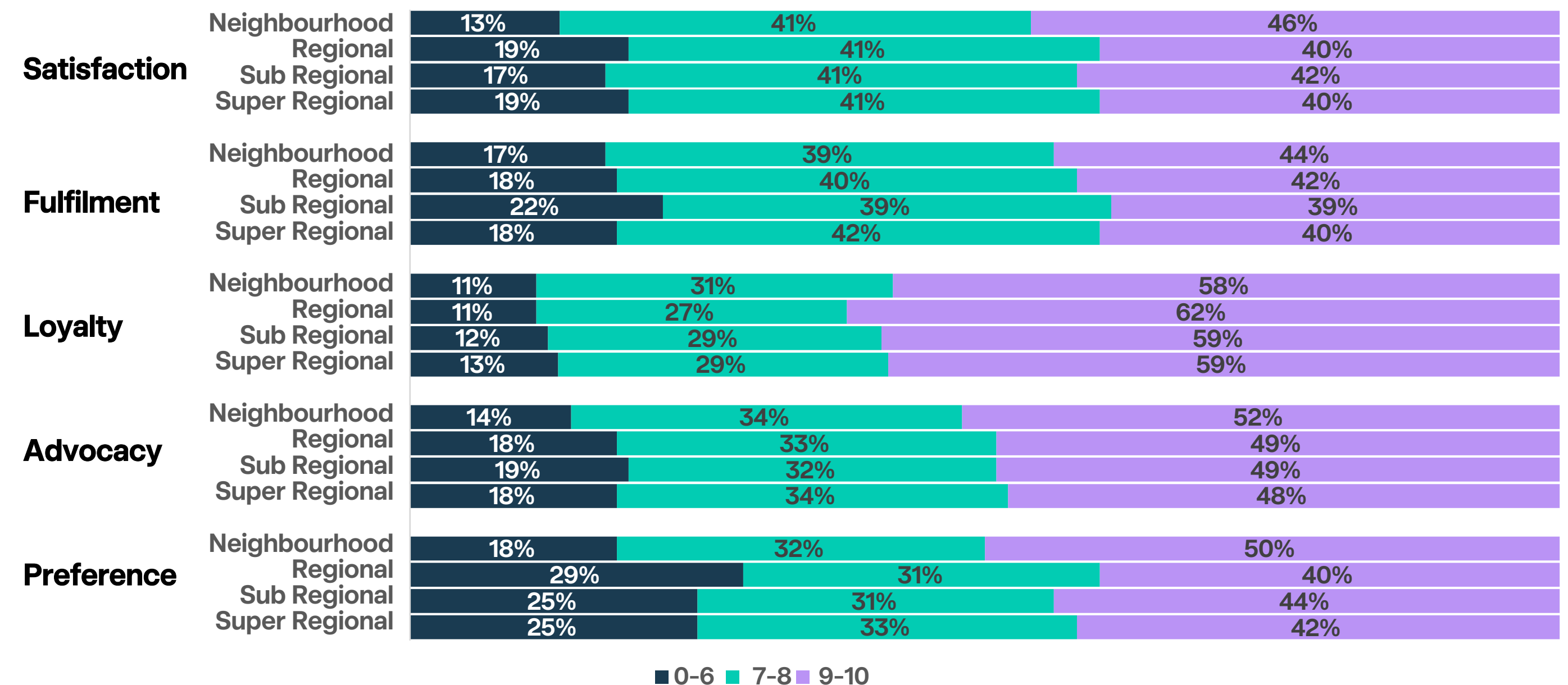


Neighbourhood centres have the highest levels of ‘endorsers’ across 4/5 metrics.

By format, Neighbourhood and Regional centres set the pace on Satisfaction, Fulfilment, Advocacy and Preference, with higher promoter shares and fewer detractors than Sub-regional and Super-regional assets.

Loyalty is broadly consistent across formats, indicating repeat visitation is resilient even where other perceptions lag.

NPS+ Comparison by Centre Size



Purpose shapes satisfaction: planned missions outperform quick trips.

Most satisfied customers are more likely to be on planned, higher-engagement visits – notably a big shop (26%) or a family day out (22%) – and show a higher share for entertainment (10%).

Least satisfied customers skew towards quick shop/ bite (14% vs 7%), and are slightly more represented in lower-engagement purposes such as socialising (5% vs 3%) and treat yourself (4% vs 3%).

The opportunity is to reduce friction on short missions so quick trips feel as effortless as longer, planned visits.

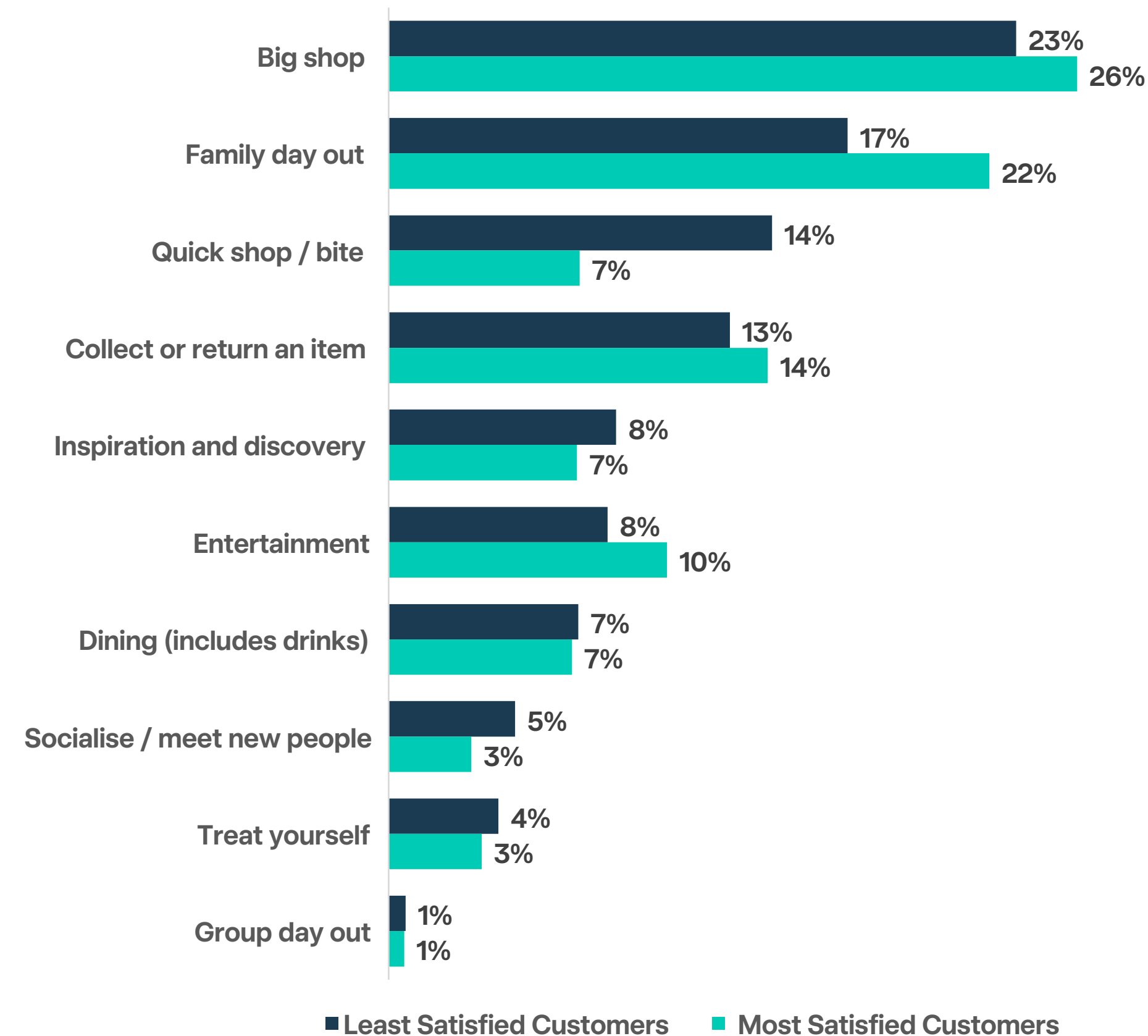
Definitions

Most satisfied: respondents scoring in the top quartile of NPS+

Least satisfied: respondents scoring in the bottom quartile of NPS+

Satisfaction related to Purpose: Least and Most Satisfied Customers

(%age proportion)



02

Key Trends and Changes



The profile shifts: mid-life and 65+ satisfaction rises; younger shoppers soften. Dwell touchpoints (play, activations, digital) improve, while first-impression fundamentals ease back. Verbatim language tilts toward customer and provide, signalling demand for visible delivery.

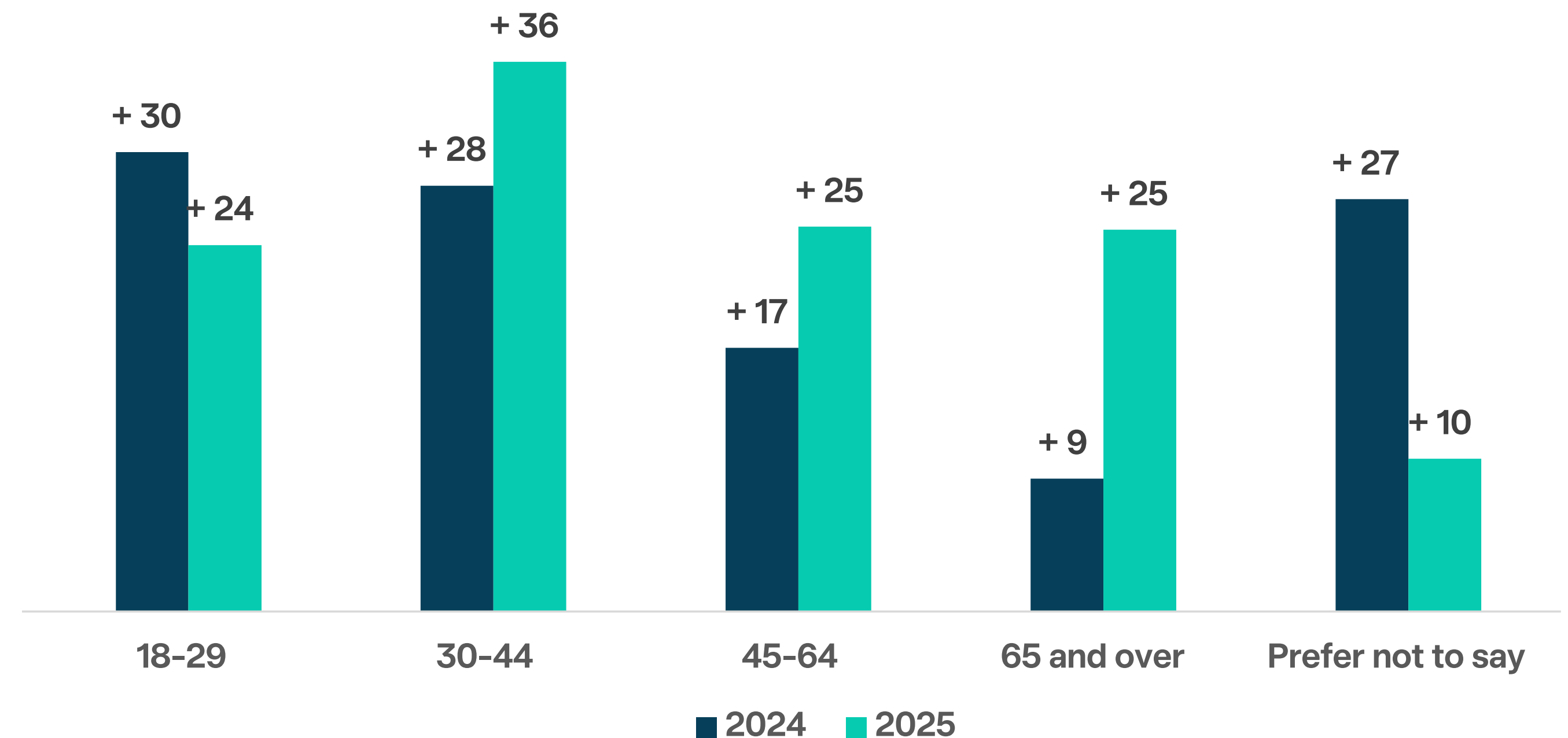


Mid-life shoppers lead with older shoppers showing the biggest uplift.

NPS+ is highest among 30–44 year-olds at +36, an eight-point improvement on 2024, making mid-life shoppers the most satisfied cohort. 45–64 year-olds also strengthen, rising from +17 to +25. In contrast, 18–29 year-olds ease back from +30 to +24.

The most pronounced change is among shoppers aged 65 and over, improving from +9 to +25, indicating better experiences for older visitors. The ‘prefer not to say’ group declines from +27 to +10; this is a small base and should be interpreted cautiously.

NPS+ by Age
comparing 2024 to 2025

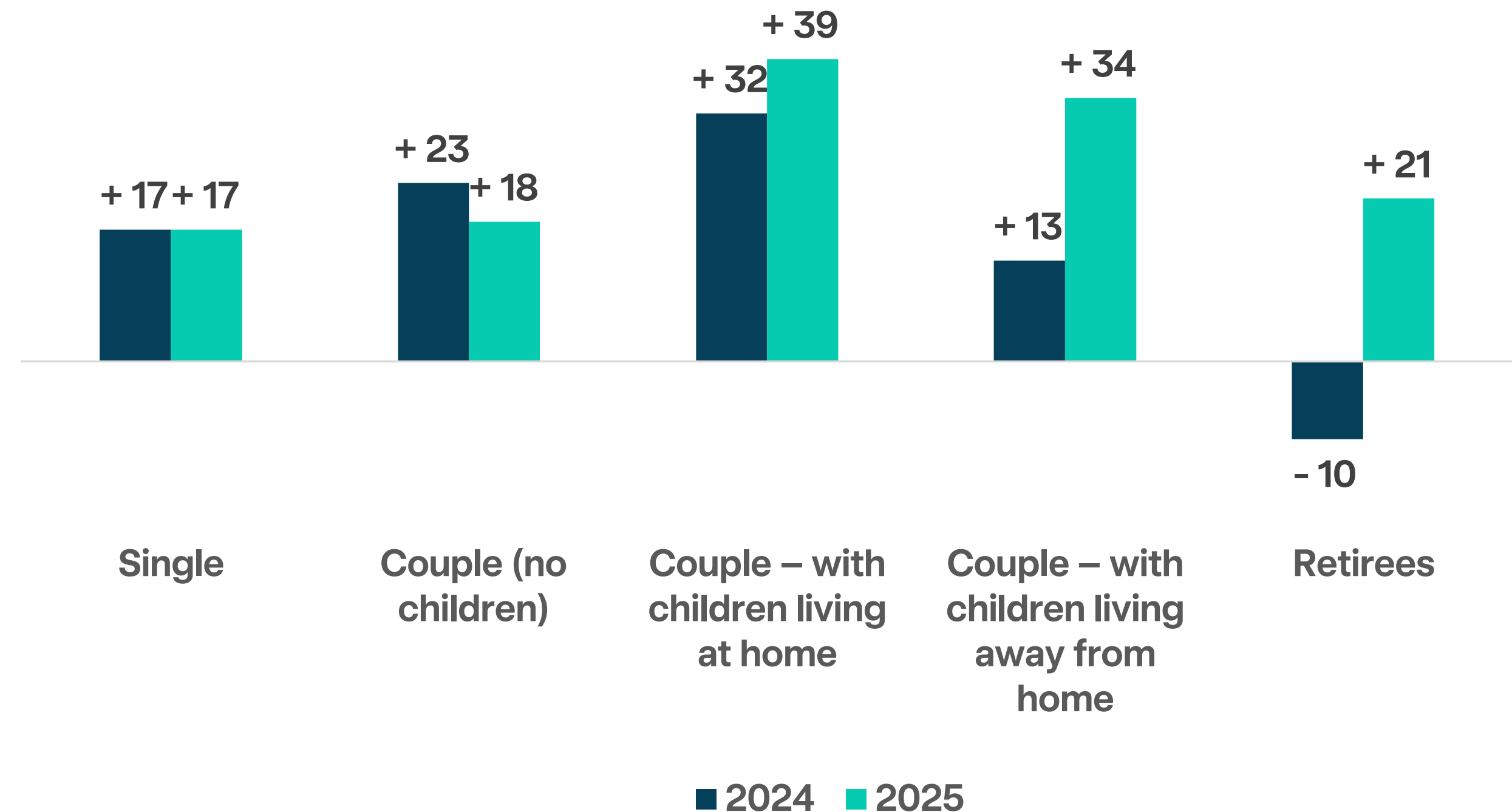


Families lead the uplift, while retirees return to positive territory.

Households with children post the strongest results. Couples with children at home record the highest NPS+ at +39, improving on last year, while couples with children who have left home lift markedly to +34. Retirees show the largest turnaround, moving from a negative result in 2024 to +21 in 2025, indicating a materially better experience for mature shoppers.

Single-person households are steady at +17, and couples without children soften slightly to +18.

NPS+ by Household Type comparing 2024 to 2025

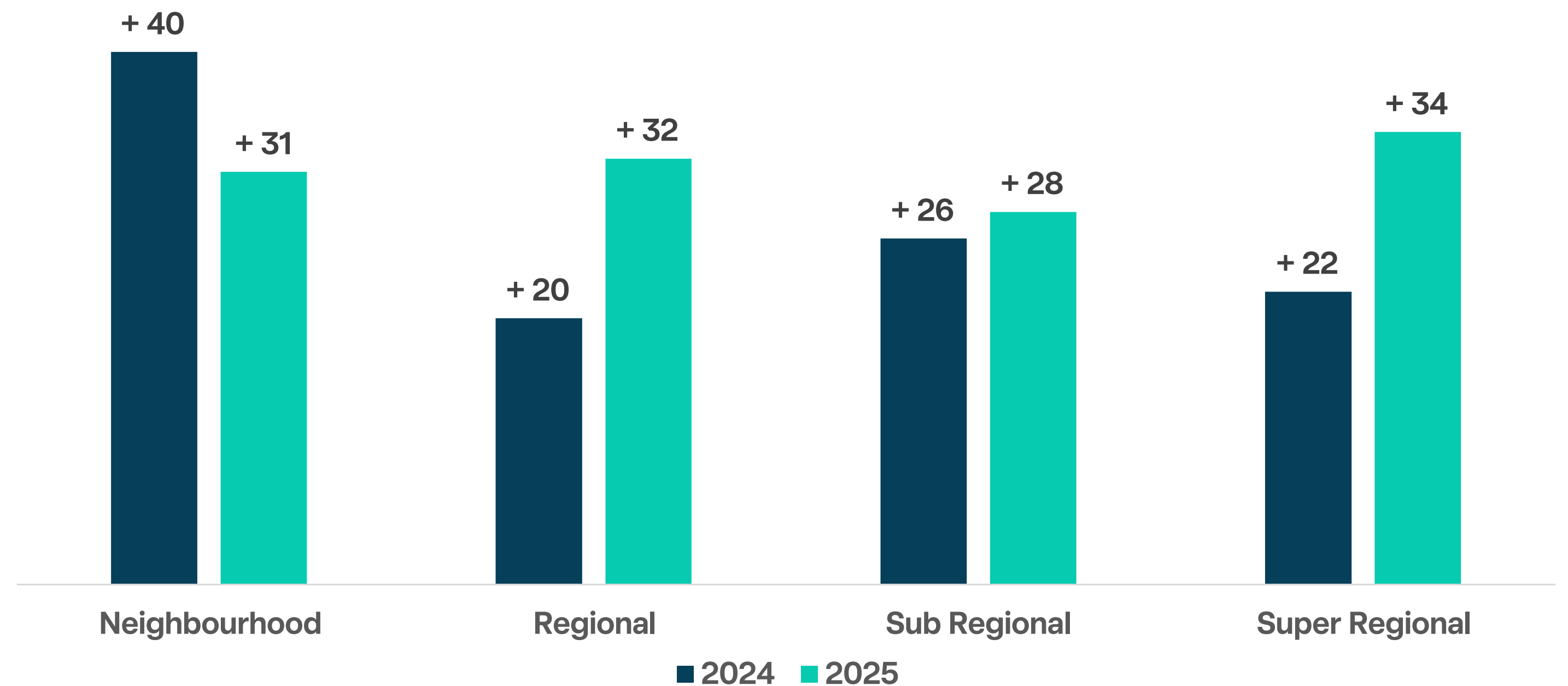


Larger formats rebound while neighbourhood cools from last year's peak.

Regional and Super Regional centres record the strongest momentum, with NPS+ rising from +20 to +32 and +22 to +34 respectively. Sub Regional lifts modestly (+26 to +28). Neighbourhood centres ease back from last year's very high +40 to +31, but remain clearly positive.

The pattern suggests shoppers are re-engaging with the variety, amenity and experience depth of larger destinations, while smaller formats may need sharper value cues and day-to-day fundamentals to sustain advocacy.

NPS+ by Centre Size
comparing 2024 to 2025

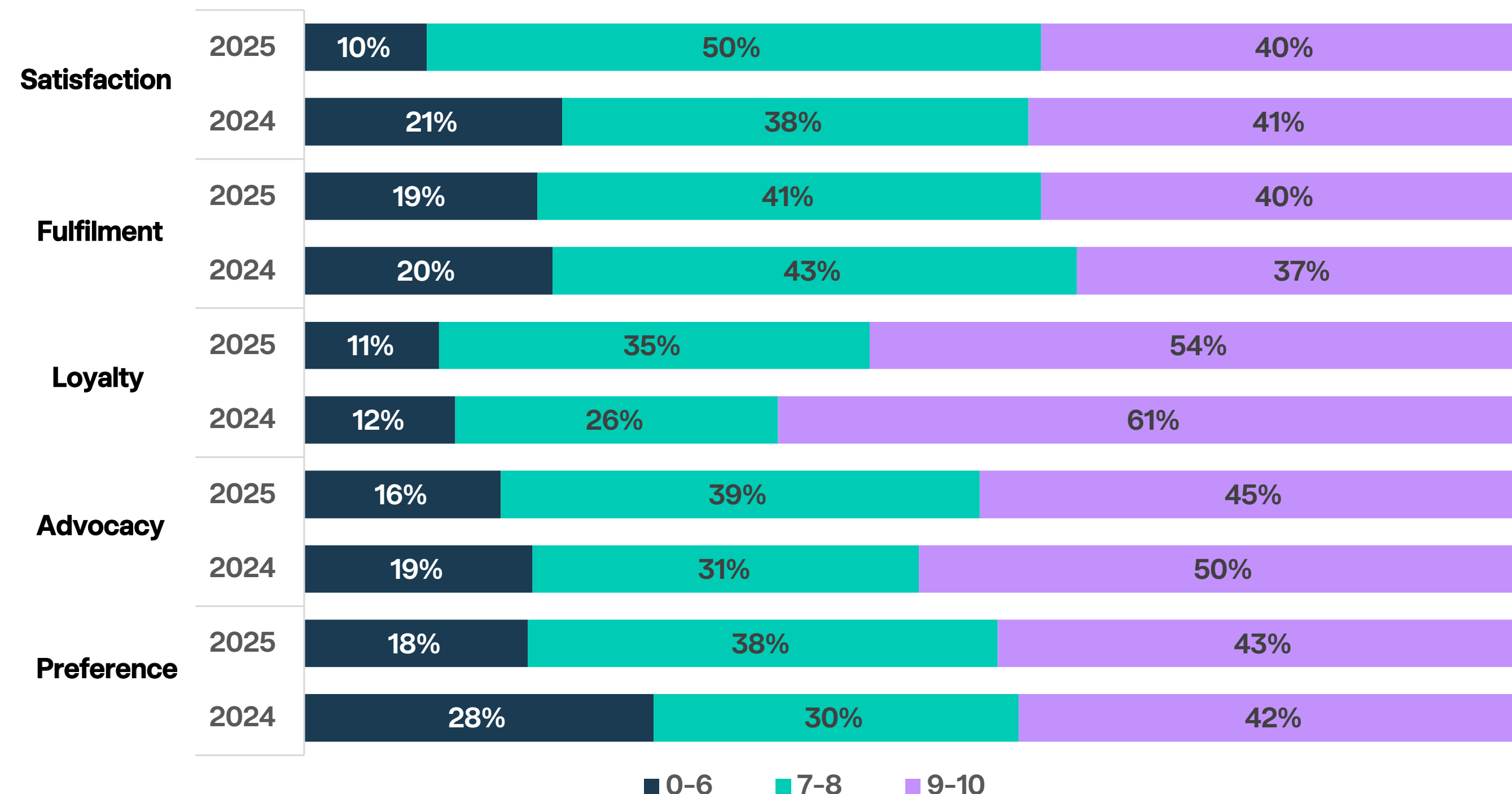


Detractors decline while the ‘middle’ grows across sentiment dimensions.

Detractors fall across all five NPS+ measures in 2025, led by Satisfaction (down from 21% to 10%) and Preference (28% to 18%). Much of this movement shifts into the 7–8 band, enlarging the ‘on-the-fence’ cohort rather than the top end.

Promoter results are mixed: Fulfilment and Preference edge up (to 40% and 43%), Satisfaction is broadly steady (40%), while Loyalty and Advocacy soften at the top (from 61% to 54% and 50% to 45%). The priority is converting 7–8s into 9–10s with clear, felt improvements.

NPS+ Subfactors comparing 2024 to 2025

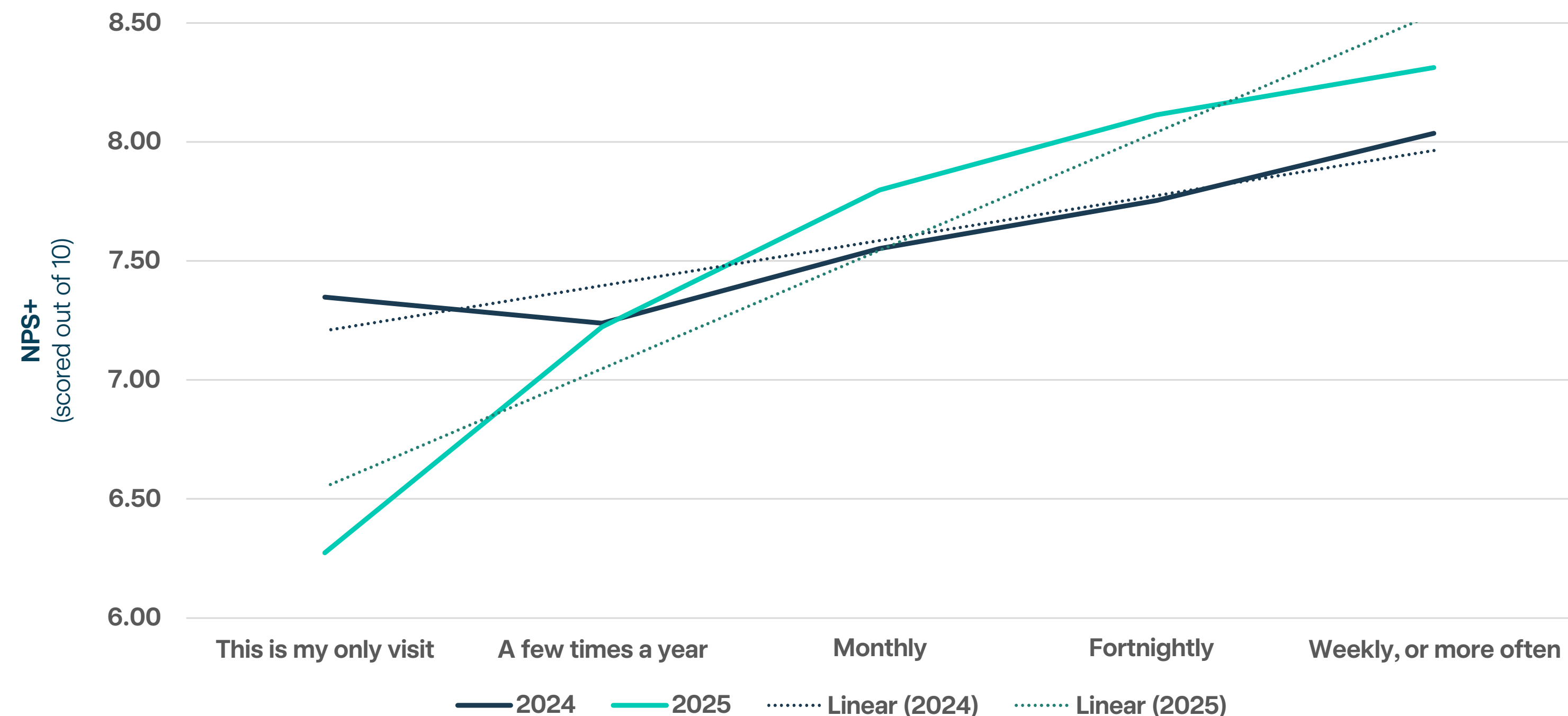


Satisfaction strengthens with frequency, with this relationship stronger in 2025.

Scores rise with visit frequency, and the 2025 trendline is noticeably steeper than 2024. Weekly and fortnightly visitors record the largest gains, with monthly visitors also improving, indicating that habitual shoppers are having better experiences this year.

In contrast, one-off and infrequent visits track lower, highlighting an onboarding opportunity: tighten first-visit fundamentals – clear wayfinding, easy entry/exit and parking, quick value cues, and simple digital prompts – to convert occasional shoppers into regulars.

NPS+ by Frequency
comparing 2024 to 2025

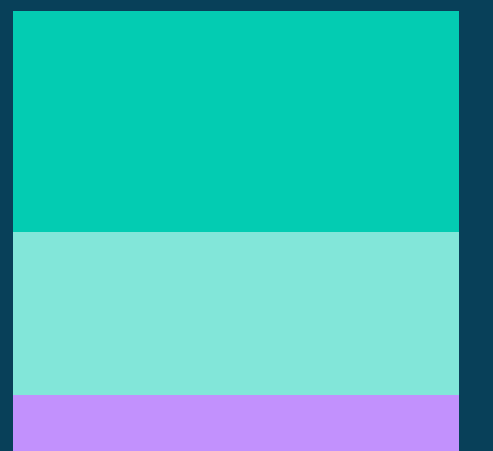


03

Sentiment related to spend



Higher spend and visit frequency align with stronger sentiment; the 2025 slope is steeper. To move low-spend, infrequent visitors up the curve, tighten first-visit basics (wayfinding, entry/exit, parking, quick value cues).

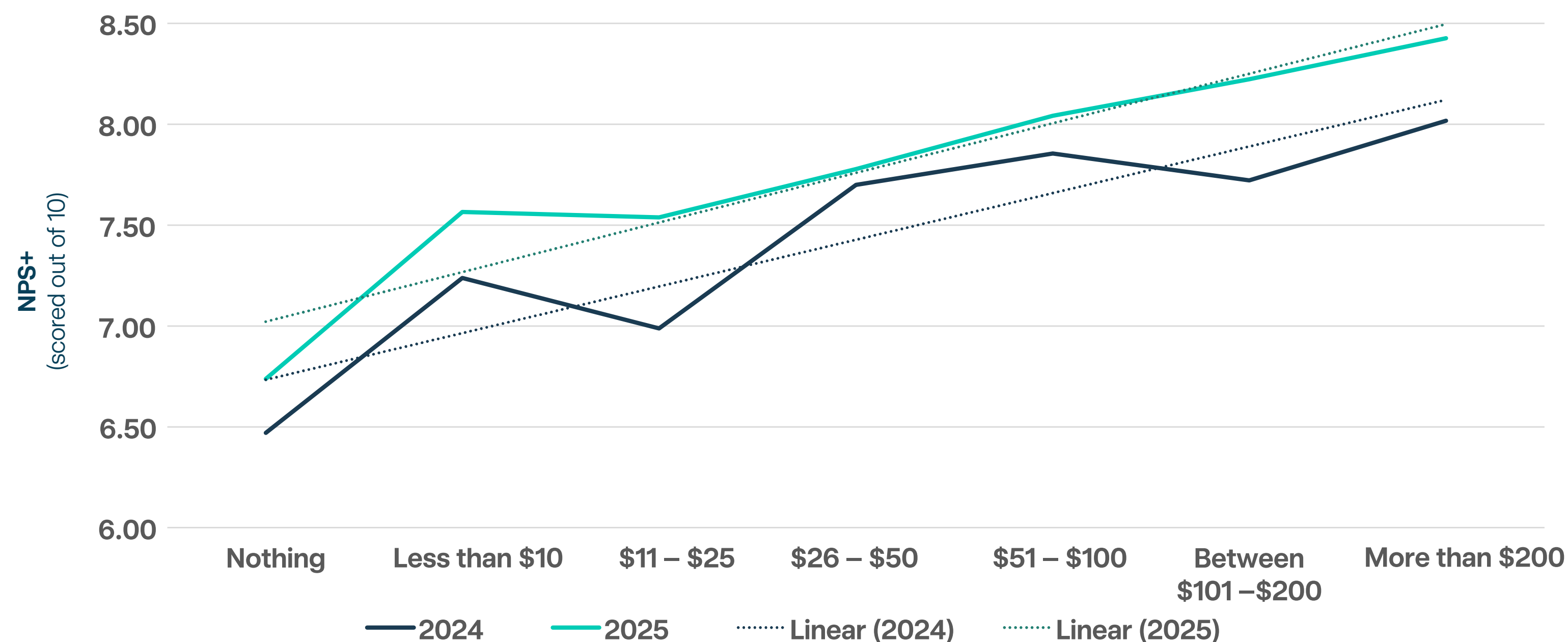


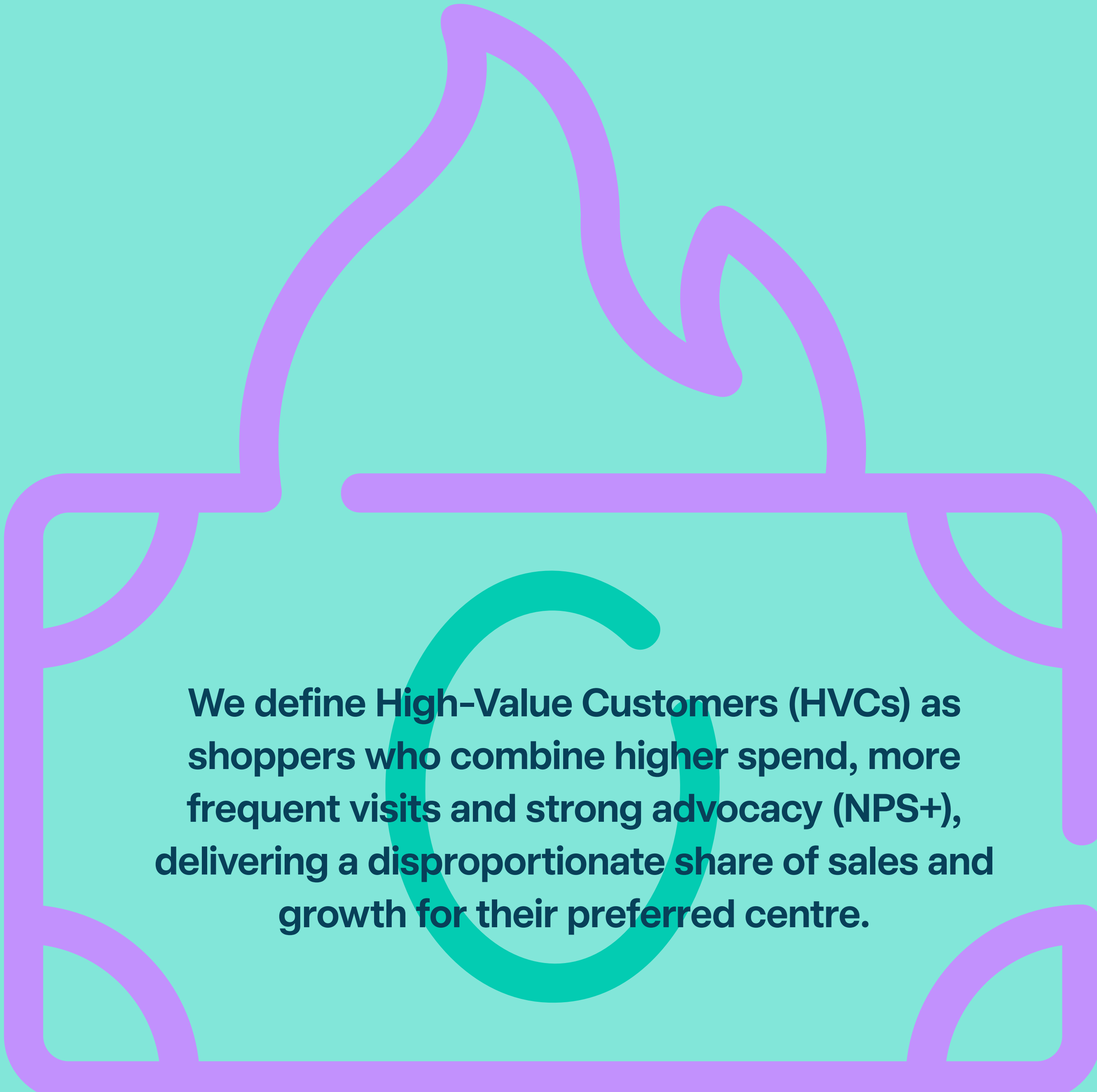
Higher spend continues to align with stronger sentiment.

Across all seven spend brackets, NPS+ rises with spend, and the relationship is marginally stronger in 2025 than in 2024. Shoppers spending \$101–\$200 and \$200+ report the highest satisfaction, while those making no purchase record the lowest.

The uplift this year is broad-based rather than concentrated in one tier, suggesting improvements in fundamentals across the entire journey. The opportunity is to lift experience and value cues for low- and mid-spend visits to move more customers up the curve.

NPS+ by Spend





We define High-Value Customers (HVCs) as shoppers who combine higher spend, more frequent visits and strong advocacy (NPS+), delivering a disproportionate share of sales and growth for their preferred centre.

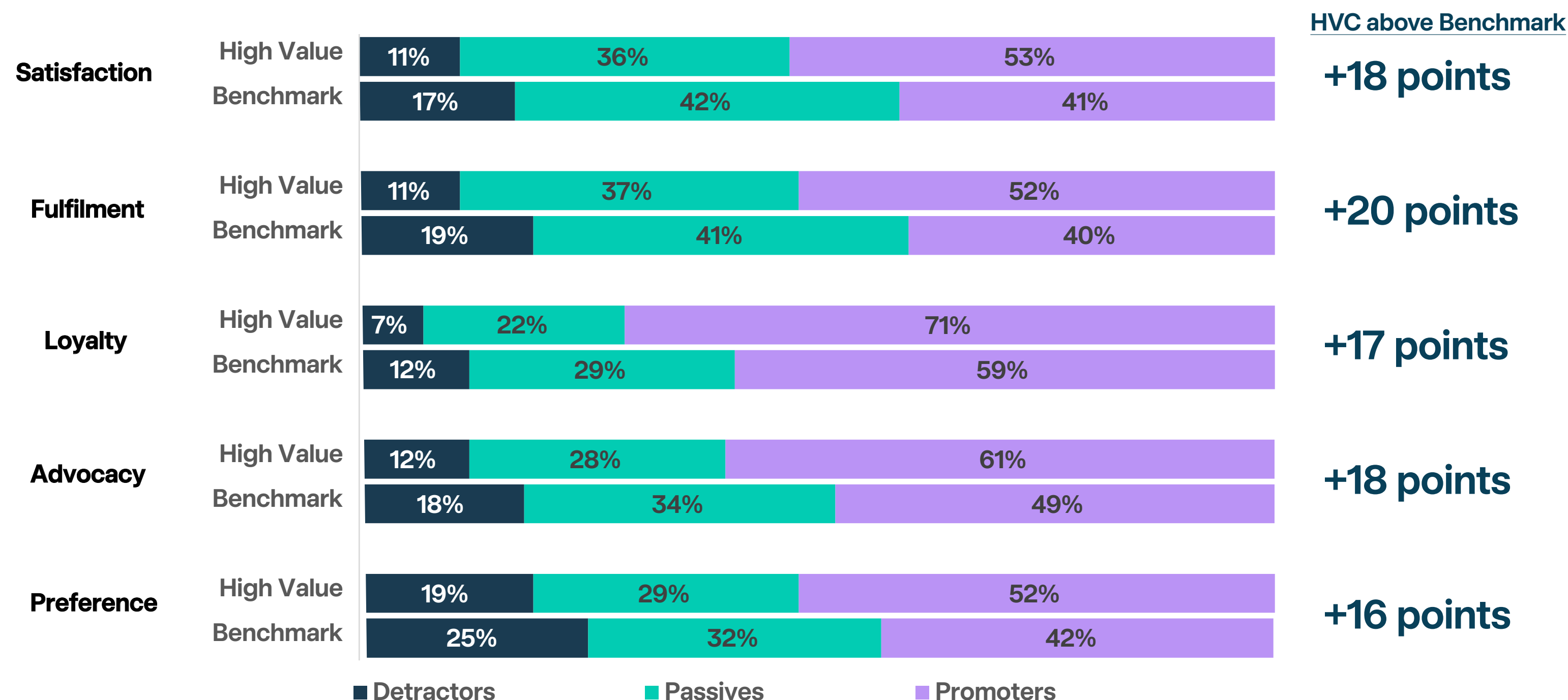
Higher spend still correlates with higher satisfaction.

HVCs record fewer detractors and more promoters than the benchmark on all five NPS+ dimensions. Promoter advantage is consistent and meaningful – about +10–12 points (Satisfaction 53% vs 41%, Fulfilment 52% vs 40%, Loyalty 71% vs 59%, Advocacy 61% vs 49%, Preference 52% vs 42%) – with detractors typically 6–8 points lower.

The takeaway: targeted investment that enhance the HVC experience are likely to lift spend.

NPS+ Subfactors by High Value Customers (HVCs)

Detractors = 0–6/10
 Passives = 7–8/10
 Endorsers 9–10/10



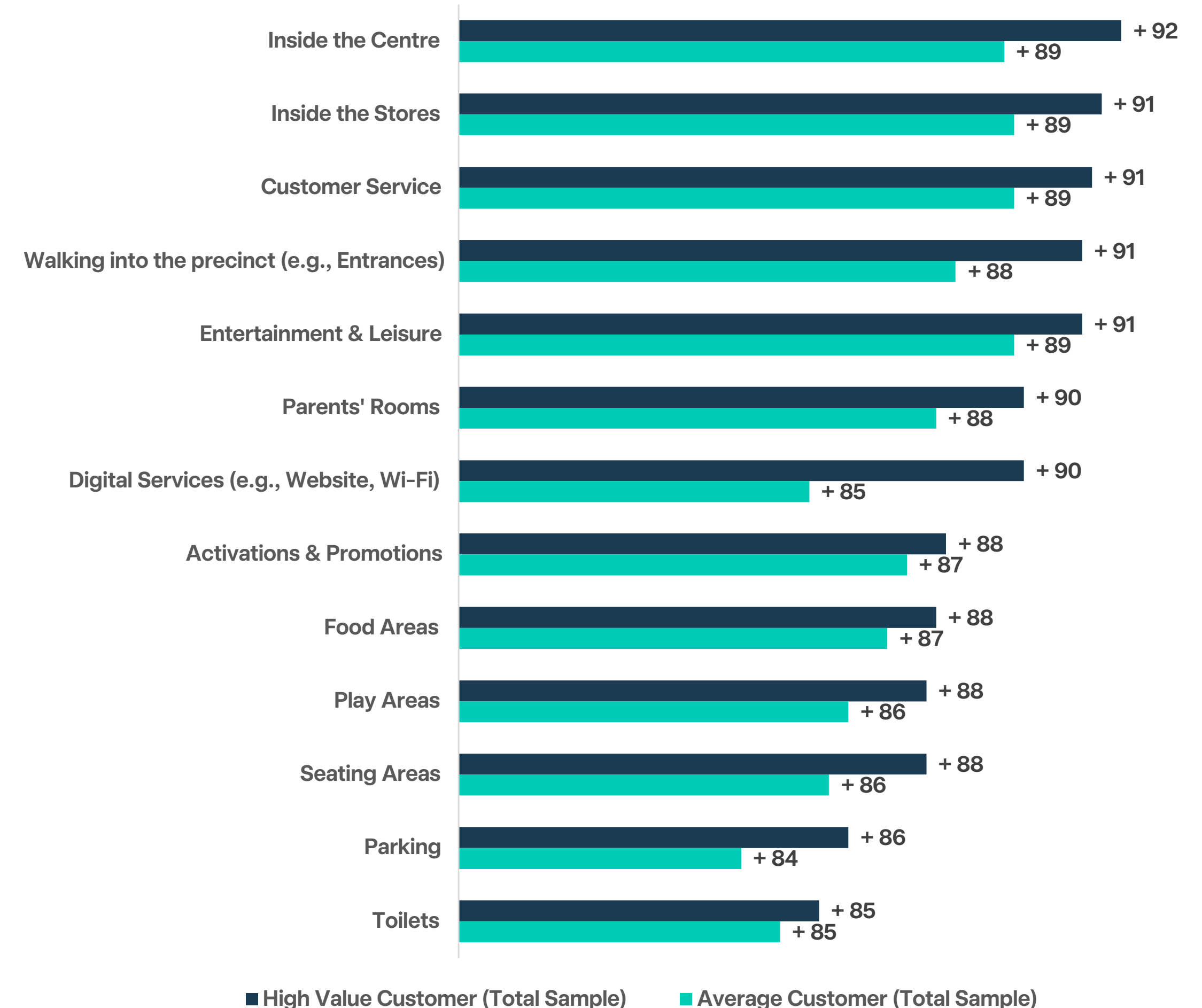
High Value Customers outperform across every touchpoint and gaps are widest on core in-centre moments.

HVCs report consistently higher satisfaction on all touchpoints, typically 86–92 points versus 84–89 among the total sample. The strongest advantages appear inside the centre, inside the stores and when walking in (entrances), with clear uplifts in entertainment & leisure, customer service, digital services (website, Wi-Fi) and parents’ rooms.

Results reflect overall data aggregated across 2025 and prior waves, indicating a stable pattern rather than a one-off spike.

High value customers (HVCs) satisfaction with touchpoints

Scored out of 100

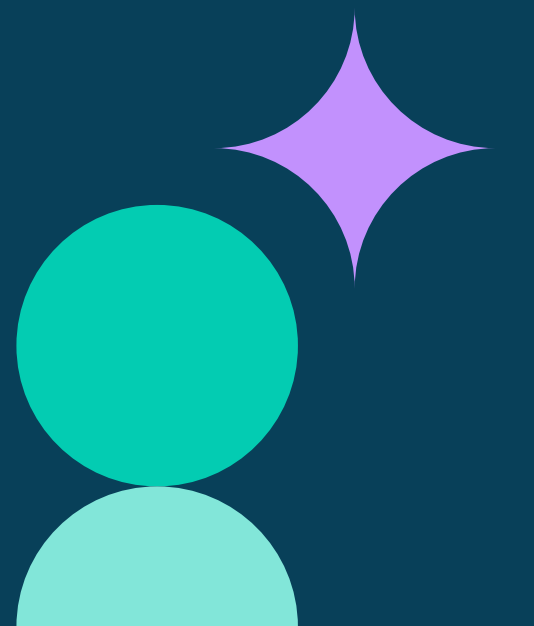


04

Sentiment related to centre experience



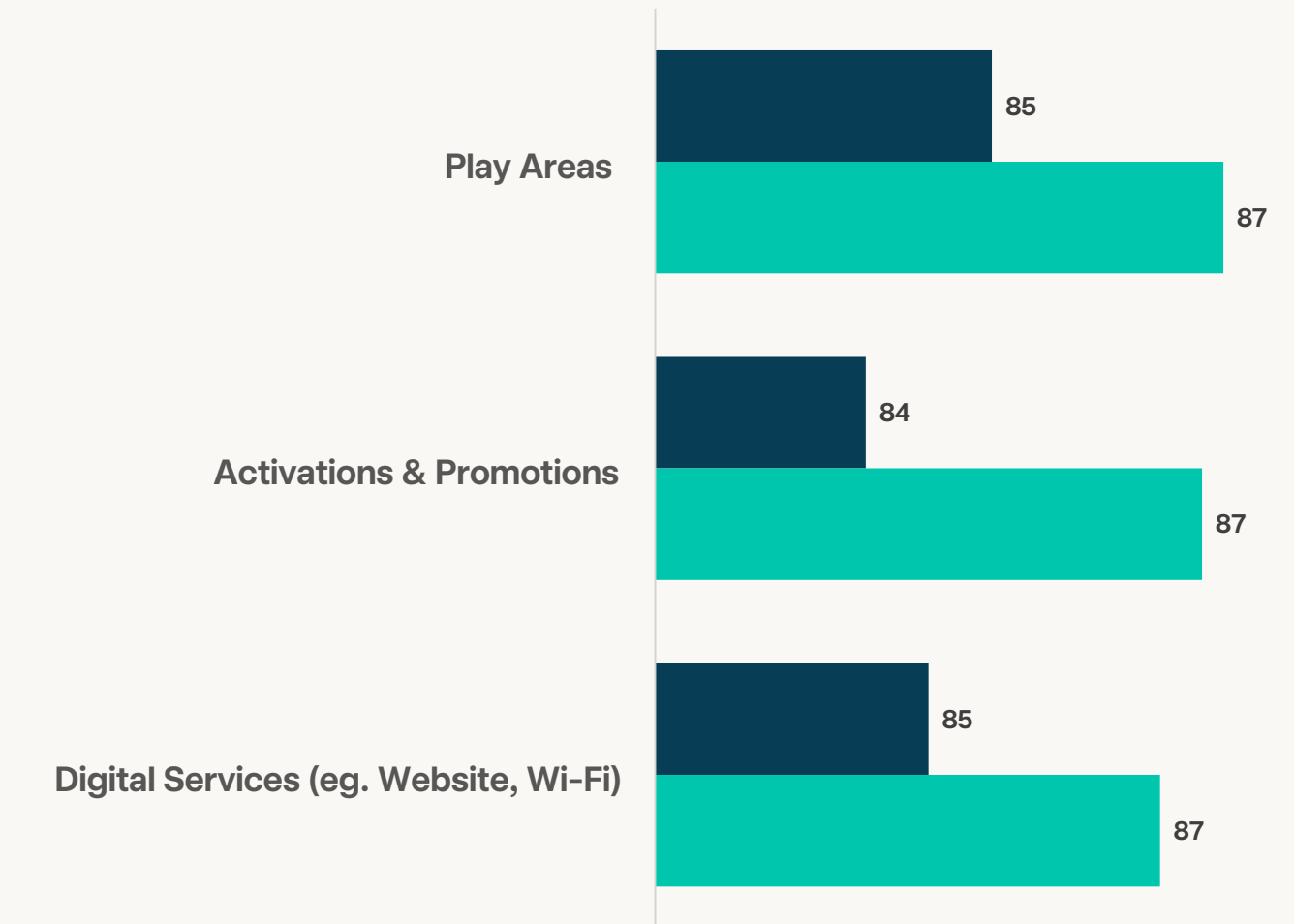
What lifts scores: reliable basics (cleanliness, maintenance, entrances, toilets) plus useful digital and comfortable dwell spaces. The priority is converting the 7–8s into 9–10s through changes shoppers can see and feel.



RISING
IN 2025

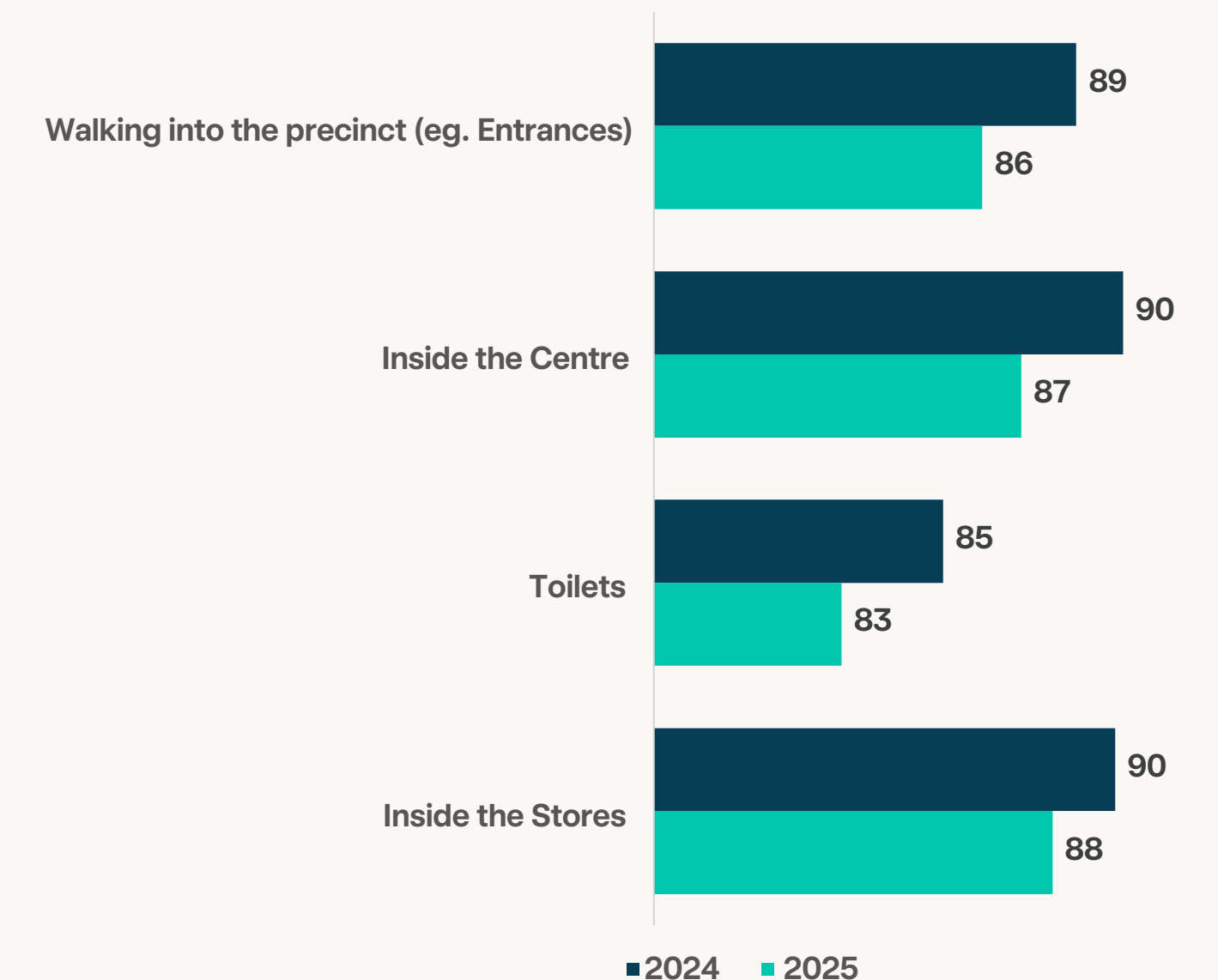
Touchpoint Satisfaction Comparing 2024 to 2025

Spaces that encourage time-in-centre show modest gains in 2025: Play Areas rise from 85 to 87, Activations & Promotions from 84 to 87, and Digital Services (e.g. click and collect, centre app) from 85 to 87.



FALLING
IN 2025

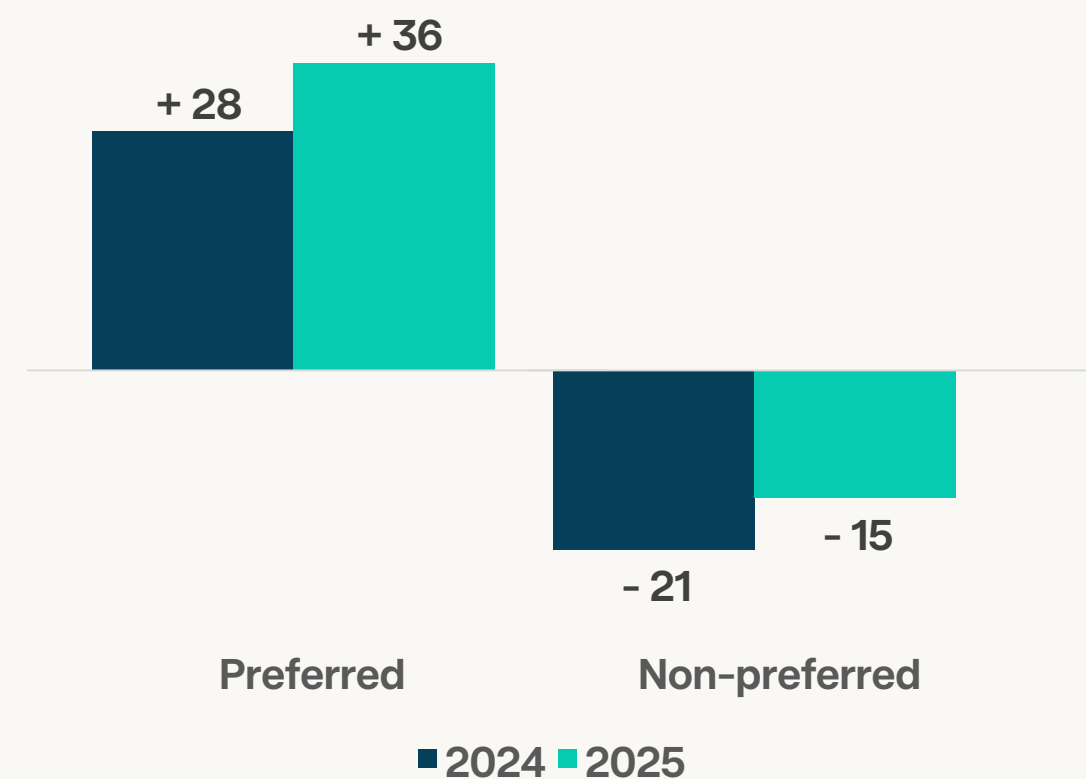
Core touchpoint moments ease back year on year: Walking into the precinct dips from 89 to 86, Inside the centre from 90 to 87, Inside the stores from 90 to 88, and Toilets from 85 to 83. Levels remain high, but the direction is down, pushing more respondents into the 7–8 band.



Win preference by fixing the biggest functional gaps first.

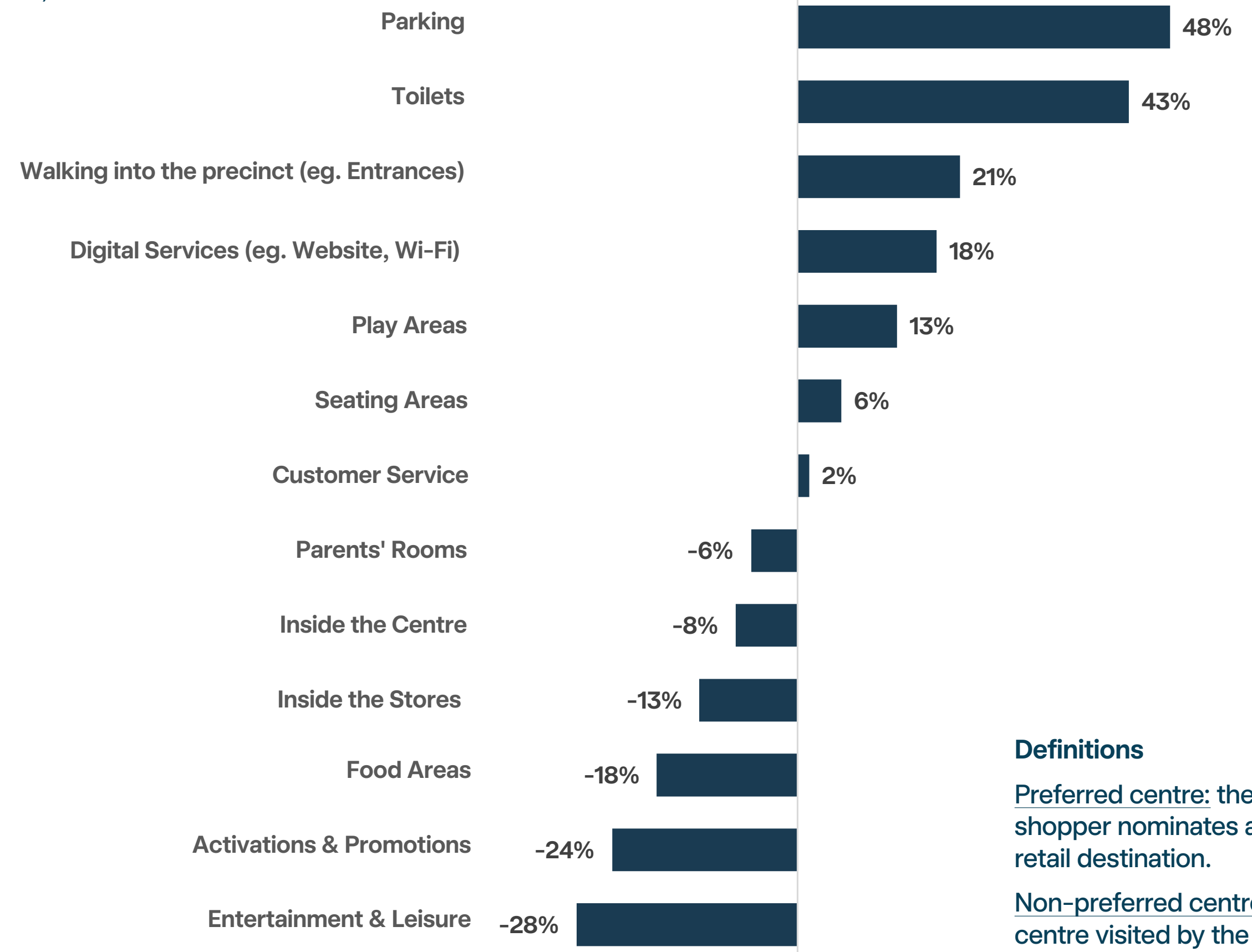
If preference drives spend, the fastest way to convert non-preferred visitors is to close the largest satisfaction gaps versus preferred centres. The biggest gaps relate to parking (+48pp), toilets (+43pp), entryways (+21pp) and digital services (+18pp), followed by play areas (+13pp) and seating (+6pp). Leisure moments (entertainment, activations, food) show little to negative advantage for preferred centres, so they are not the conversion lever.

NPS+ Comparison by Preferred Centre



Touchpoint satisfaction (%age difference), Preferred Centre compared to Non-preferred Centre

(%age difference)



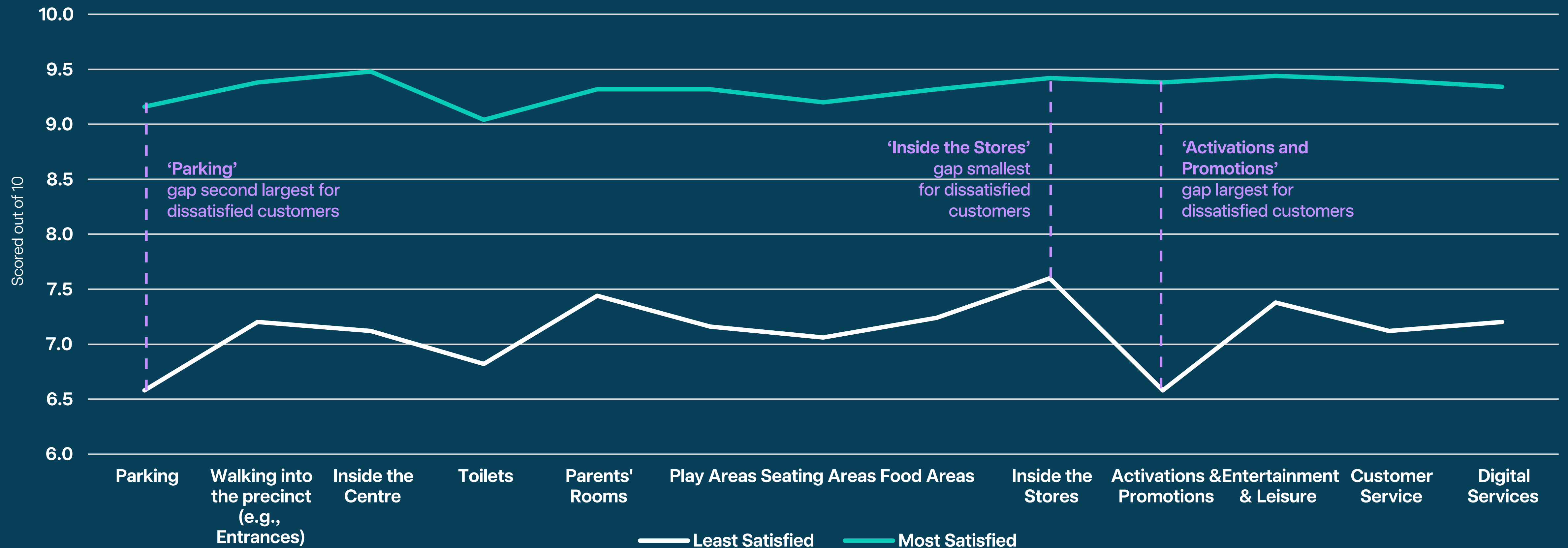
Definitions


Preferred centre: the centre a shopper nominates as their main retail destination.

Non-preferred centre: any other centre visited by the shopper.

To move least satisfied (0–6) shoppers toward most satisfied (9–10), target the touchpoints with the widest experience gaps. The largest separations sit around Activations & Promotions and Entertainment & Leisure (quality, relevance, delivery), with a material gap in parking as well.

Inside the stores shows the smallest gap, so core retail alone rarely rescues a weak visit. Net effect: address these high-gap touchpoints and you lift sentiment first – then visitation and spend, consistent with the spend–sentiment link established earlier in the report.





**In our research,
customers are asked how
each of the touchpoints
could be improved.**

Q

**‘What one change would
you make to improve
the experience of this
touchpoint?’**

What one change would you make to improve the experience of the centre?

Neighbourhood

Improved Seating and Rest Areas

Many respondents want more comfortable seating areas throughout shopping centres where customers can relax while shopping. This includes requests for lounges, charging stations, and dedicated rest zones.

Better Navigation and Signage

Clear directional signs, interactive digital maps, and improved wayfinding systems were frequently mentioned. Shoppers find it challenging to locate stores and amenities and want better guidance.

Enhanced Customer Service

Respondents emphasised the importance of well-trained staff with positive attitudes. This includes professional shopping assistance, prompt responses to queries, and overall service quality improvement.

Sub-Regional

Parking Improvements

Numerous respondents mentioned the need for more parking spaces, better parking management, free parking, easier access, and improved parking lot safety and design.

Enhanced Customer Service

Many comments focused on improving staff training, increasing the number of customer service representatives, creating information desks, and ensuring friendly, efficient assistance.

Cleanliness and Facilities

Frequent mentions of cleaner toilets, more regular maintenance of public areas, and improved hygiene standards throughout the centres.

Regional

Parking Improvements

Many respondents mentioned the need for more parking spaces, better parking management, wider parking bays, improved navigation in parking areas, and some suggested free parking. Issues with parking appear to be a significant pain point.

Cleanliness and Maintenance

Frequent mentions of keeping facilities clean and well-maintained, particularly restrooms/toilets, food courts, and common areas. Regular cleaning schedules and hygiene standards were emphasised.

Enhanced Customer Service

Numerous responses focused on improving service quality, staff training, professional service attitudes, and increasing the number of customer service points throughout centres.

Super Regional

Navigation and Signage

Numerous comments focus on improving wayfinding, adding digital navigation terminals, clearer signage, and better directional information to help customers navigate the centre easily.

Parking Improvements

Significant concerns about parking areas including size of spaces, lighting, traffic flow, exit congestion, and overall parking management and availability.

Seating and Rest Areas

Many comments request more comfortable seating, rest areas, lounges, and social spaces where customers can relax while shopping.

Top 3 changes you would you make to improve the touchpoint experience

Activations

1. **Promotions and offers**
(stronger deals, giveaways, discounts)
2. **Digital and influencer marketing**
(social, targeted content)
3. **Family and entertainment**
(buskers, community activations)

Play Areas

1. **Cleanliness and maintenance**
(regular checks, repairs)
2. **Seating and parent amenities**
(comfortable seating, parent lounge)
3. **Age zoning and suitability**
(toddler/older kid options)

Entryways

1. **Wayfinding and maps at the door**
(clear, immediate navigation)
2. **Clean, tidy, welcoming entrances**
(lighting, décor, upkeep)
3. **Security and safety presence**
(visible staff, safe paths)

Digital

1. **Wi-Fi quality and reliability**
(stronger, more stable coverage)
2. **Digital maps and wayfinding**
(interactive, easier to navigate)
3. **Customer service link**
(service points, cleanliness tie-ins)

Inside the Centre

1. **More seating and rest areas**
(availability and provision)
2. **Cleanliness and maintenance**
(toilets, food courts, common areas)
3. **Security presence and crowd management**
(keep entries clear)

Parking

1. **Wayfinding and flow**
(clear entries/exits, simple layouts)
2. **Pricing and time**
(cheaper, longer free periods)
3. **Bay and aisle size**
(wider bays, larger turning circles)

What are experience themes?

In addition to answering questions about touchpoint performance, customers are also asked about experiential themes. Unlike touchpoints, these six themes are present across the customer experience.

Cleanliness

ENTRANCEWAYS – RESTROOMS – FAMILY ROOMS – FOOD AREAS

The touchpoint is clean and well presented.

Safety

PARKING – ENTRANCEWAYS – RESTROOMS – FAMILY ROOMS

The touchpoint is safe.

Maintenance

SEATING AREAS – ENTRANCEWAYS – RESTROOMS – INSIDE THE CENTRE

The touchpoint is well maintained and in good working order.

Design

SEATING AREAS – RESTROOMS – FAMILY ROOMS – FOOD AREAS

The touchpoint is well designed and suited to my needs.

Service

GUEST SERVICES – DIGITAL SERVICES

The touchpoint offers a good level of service.

Experience

GUEST SERVICES – DIGITAL SERVICES – INSIDE STORES – CENTRE PROMOTIONS

The touchpoint provides a positive experience.

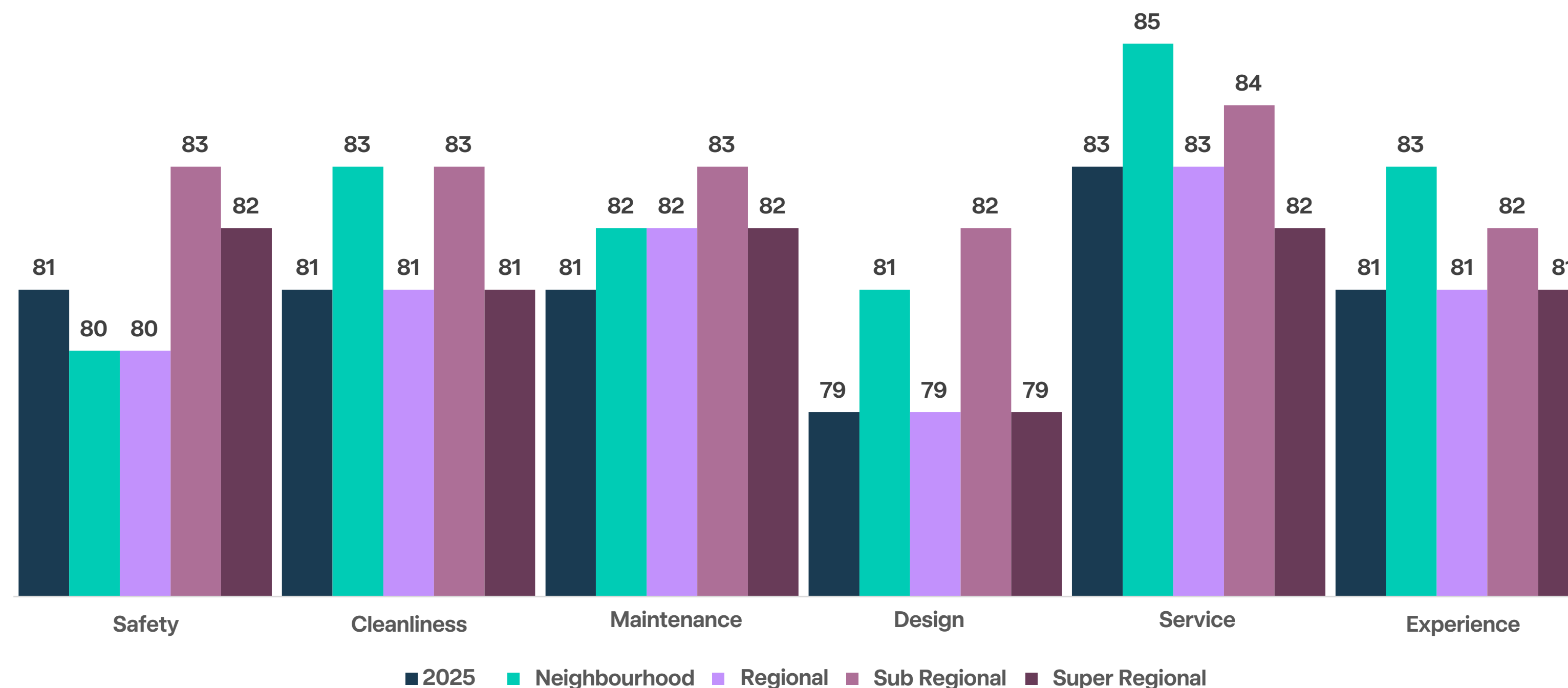
Experience themes vary by centre size – service leads, design lags.

Across the six themes, performance sits in a narrow band (around 80–85), but the profile differs by format. Service is the stand-out, highest in Neighbourhood centres (85) and solid elsewhere (83–84). Maintenance is consistently strong with a slight Sub-regional edge (83). Experience is consistently strong with a slight Sub-regional edge (83).

Cleanliness is led by Neighbourhood and Sub-regional (83). Design is the softest theme, particularly in Regional and Super-regional (both 79), indicating opportunities in placemaking and visual refresh. Experience overall is highest in Neighbourhood (83), while Safety remains steady across sizes (80–83).

Themes by Centre Size

(Scores out of 100)



Verbatim comments show the biggest year-on-year lifts for “customer” (+85%) and “provide” (+83%) (terms with >10 mentions). This signals stronger expectations for visible, customer-centred delivery and practical improvements.

Language shifts toward customer focus and active delivery.

+85%

‘Customer’

+85%

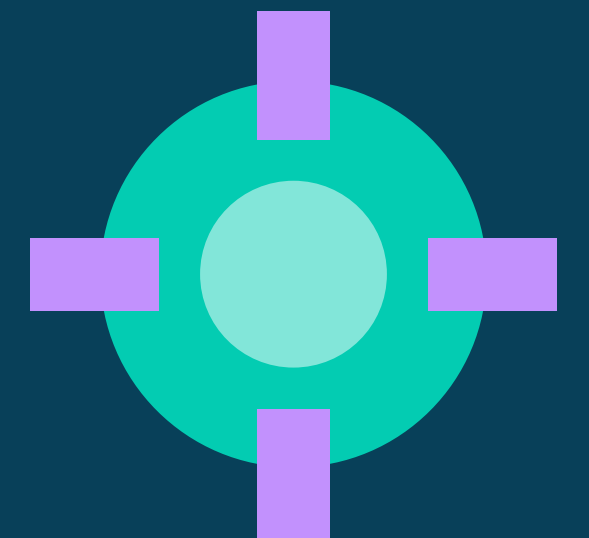
‘Provide’

05

Spotlight on Safety



Safety softens most year on year – especially in car parks and parents’ rooms – and more for younger visitors, women and non-English speakers. Visible fixes (lighting, sightlines, staff presence, cleanliness) pay back by improving both sentiment and spend.

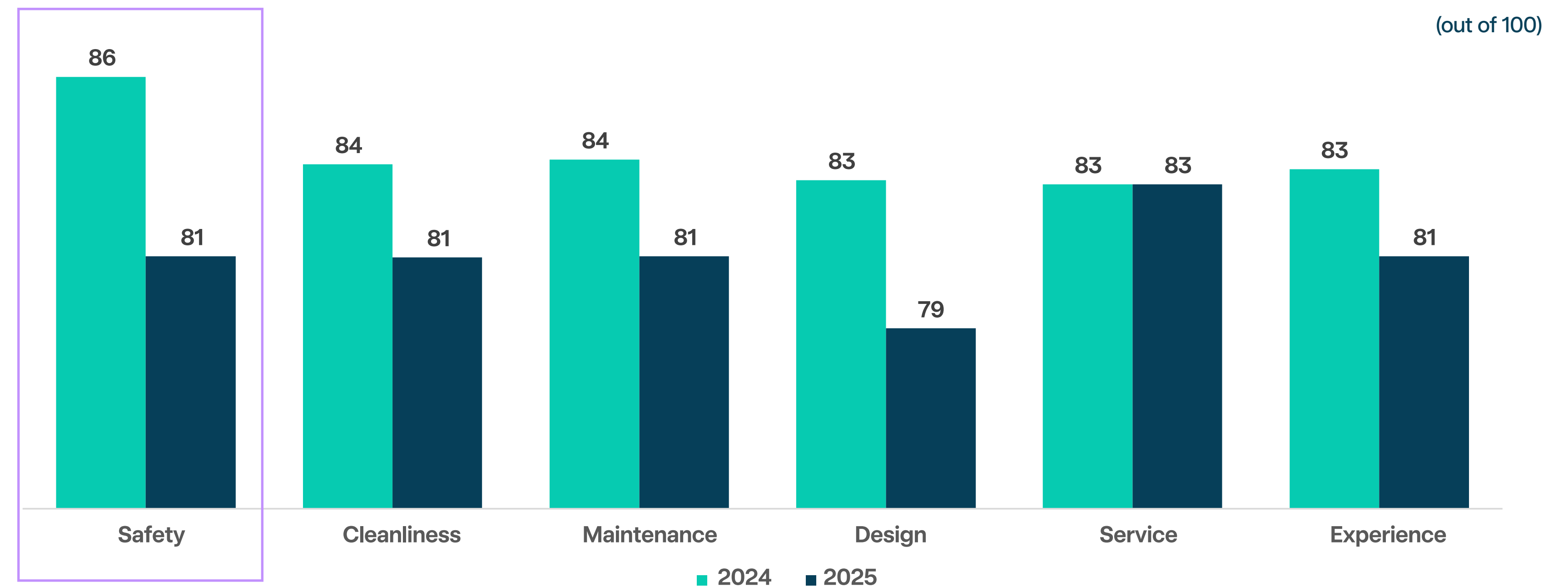


Safety theme drops the most year on year.

Year on year, most experience themes decline on the /100 scale: Safety drops from 86 to 81 (–5), Design from 83 to 79 (–4), Cleanliness and Maintenance from 84 to 81 (both –3), and Experience from 83 to 81 (–2). Service holds steady at 83.

The pattern suggests higher expectations for visible care and environment quality. Prioritise lighting and sightlines, cleanliness standards, minor repairs and wayfinding, with targeted design refreshes in high-traffic zones to protect top-box (9–10) sentiment.

Experience Themes comparing 2024 to 2025



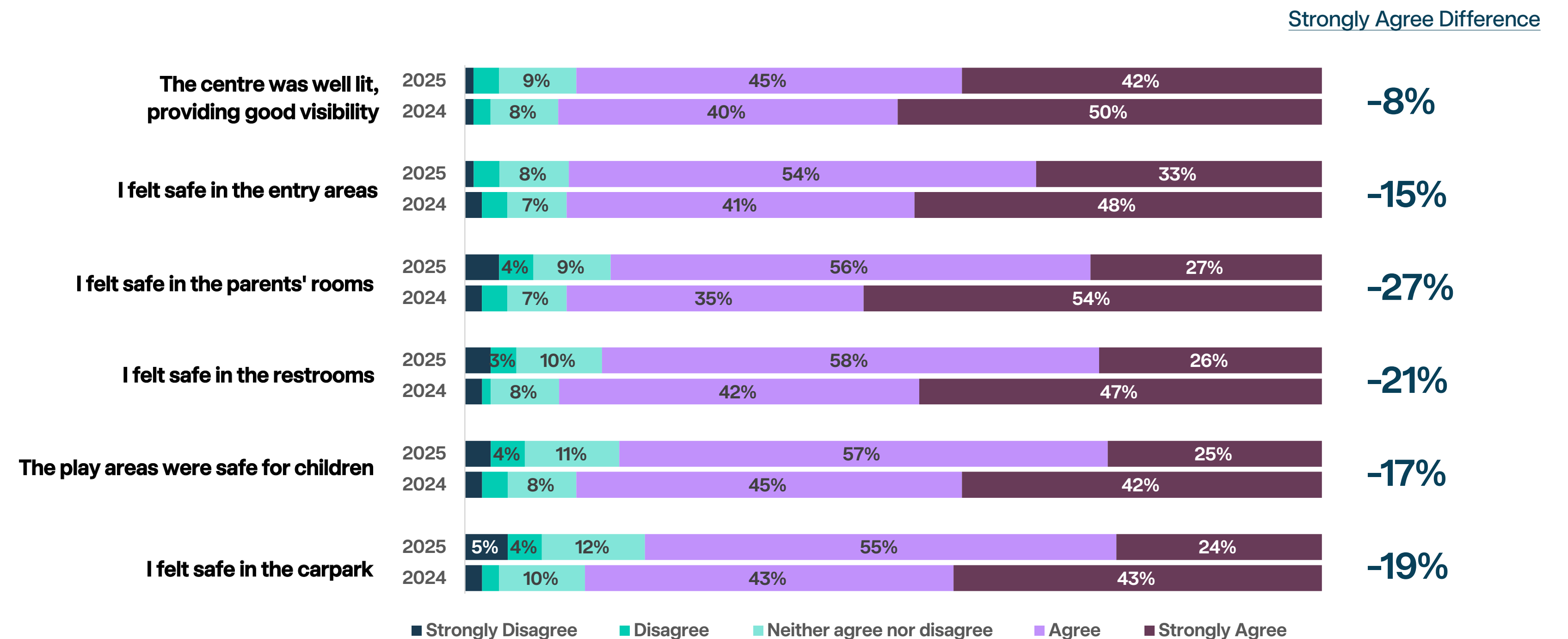
Safety confidence declines across every item.

‘Strongly agree’ ratings decline year on year across every statement: parents’ rooms (–27 points), restrooms (–21), car parks (–19), play areas (–17), entry areas (–15) and lighting/visibility (–8). The shift is mainly from Strongly agree into Agree/Neutral, not into disagreement – signalling small but noticeable lapses.

Priorities to restore top-box confidence: improve lighting and sightlines, lift cleaning frequency, ensure staff presence in car parks and family facilities, and address minor maintenance promptly.

Safety Scores by Touchpoints

Comparing 2024 to 2025

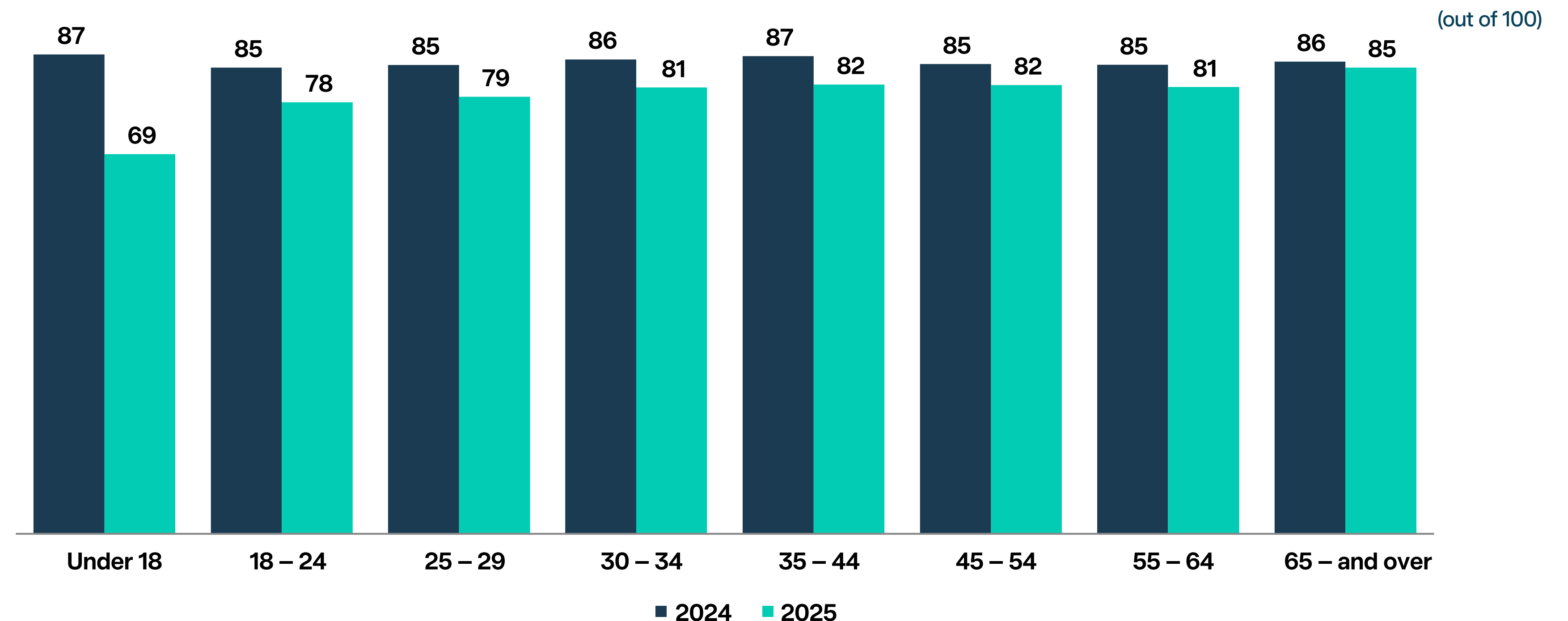


Safety feels weaker across all ages, especially for younger visitors.

Compared with 2024, safety scores decline for every age group (by one to eighteen points). The steepest drop is among Under-18s (87 to 69), with 18–24 and 25–29 also lower (85 to 78/79). Mid-life cohorts soften by 3–5 points, while 65+ is almost unchanged (86 to 85).

The pattern suggests a need for stronger visibility and reassurance where younger visitors concentrate – lighting, patrol presence and clear sightlines.

Safety Scores by Age
Comparing 2024 to 2025



Safety perceptions are lowest for women and non-English speakers

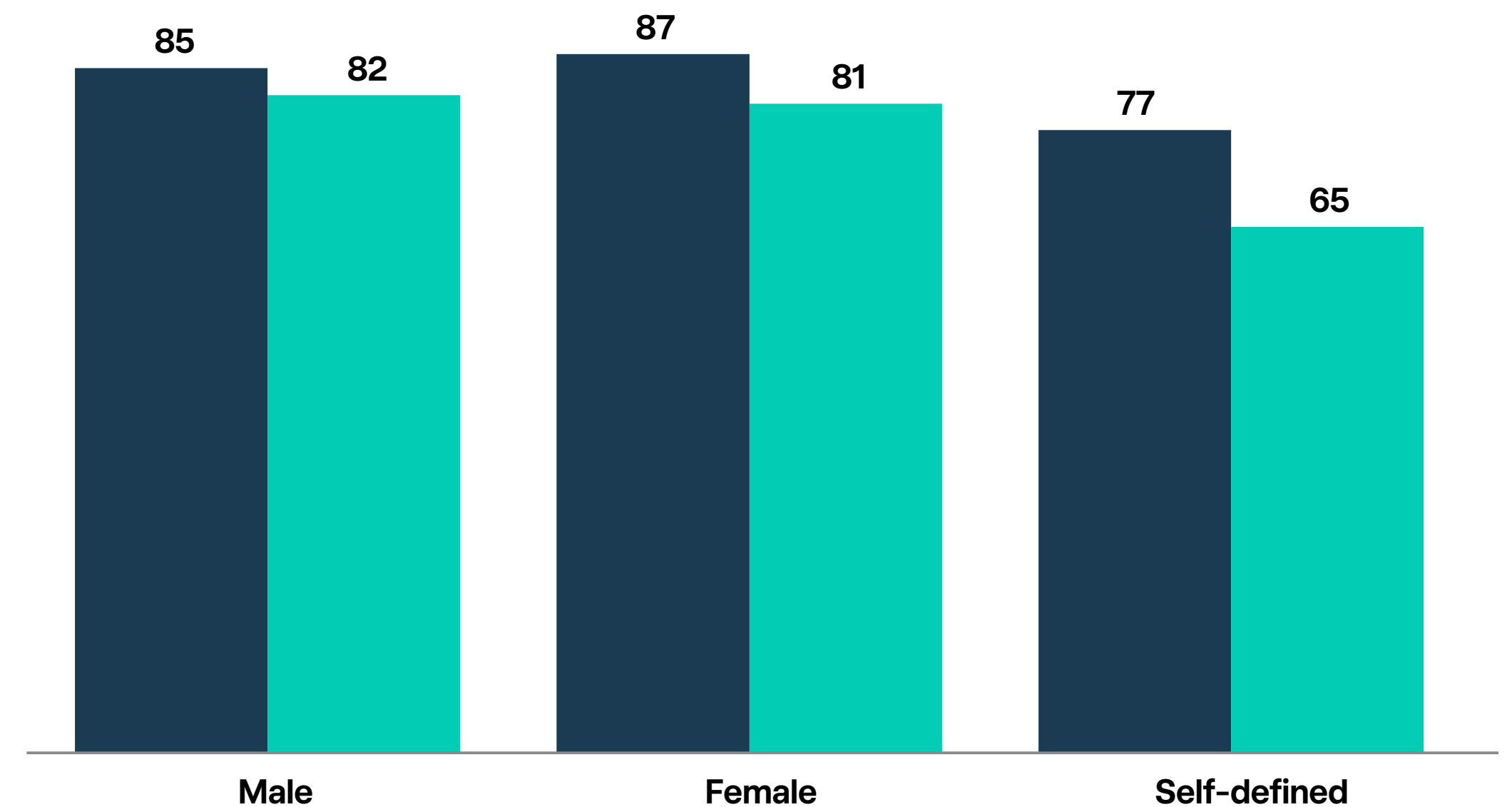
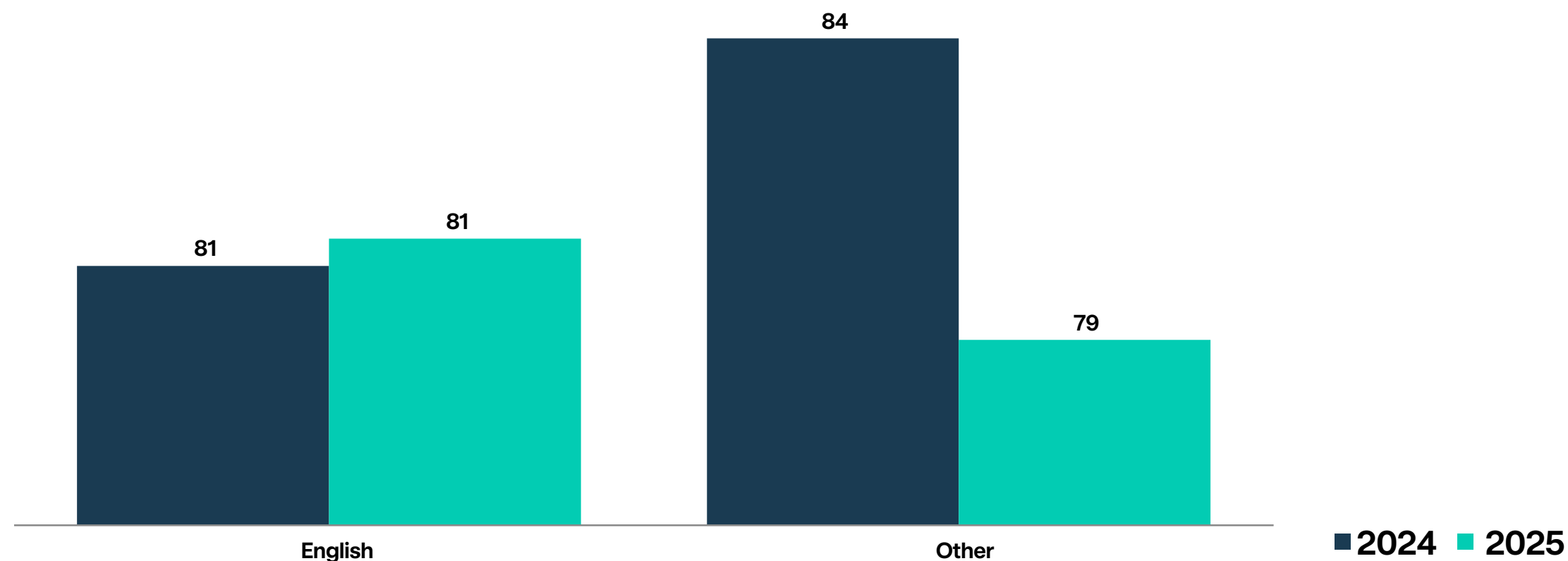
Female safety scores decline from 87 to 81, reversing last year's lead over males (85 to 82) so women now rate safety slightly lower. Scores also drop more for non-English speakers (84 to 79) than for English speakers (steady at 81).

Priorities: better lighting and sightlines, visible staff presence, and multilingual wayfinding/alerts to reassure diverse visitors.

Safety Scores by Language

Safety Scores by Gender comparing 2024 to 2025

(out of 100)

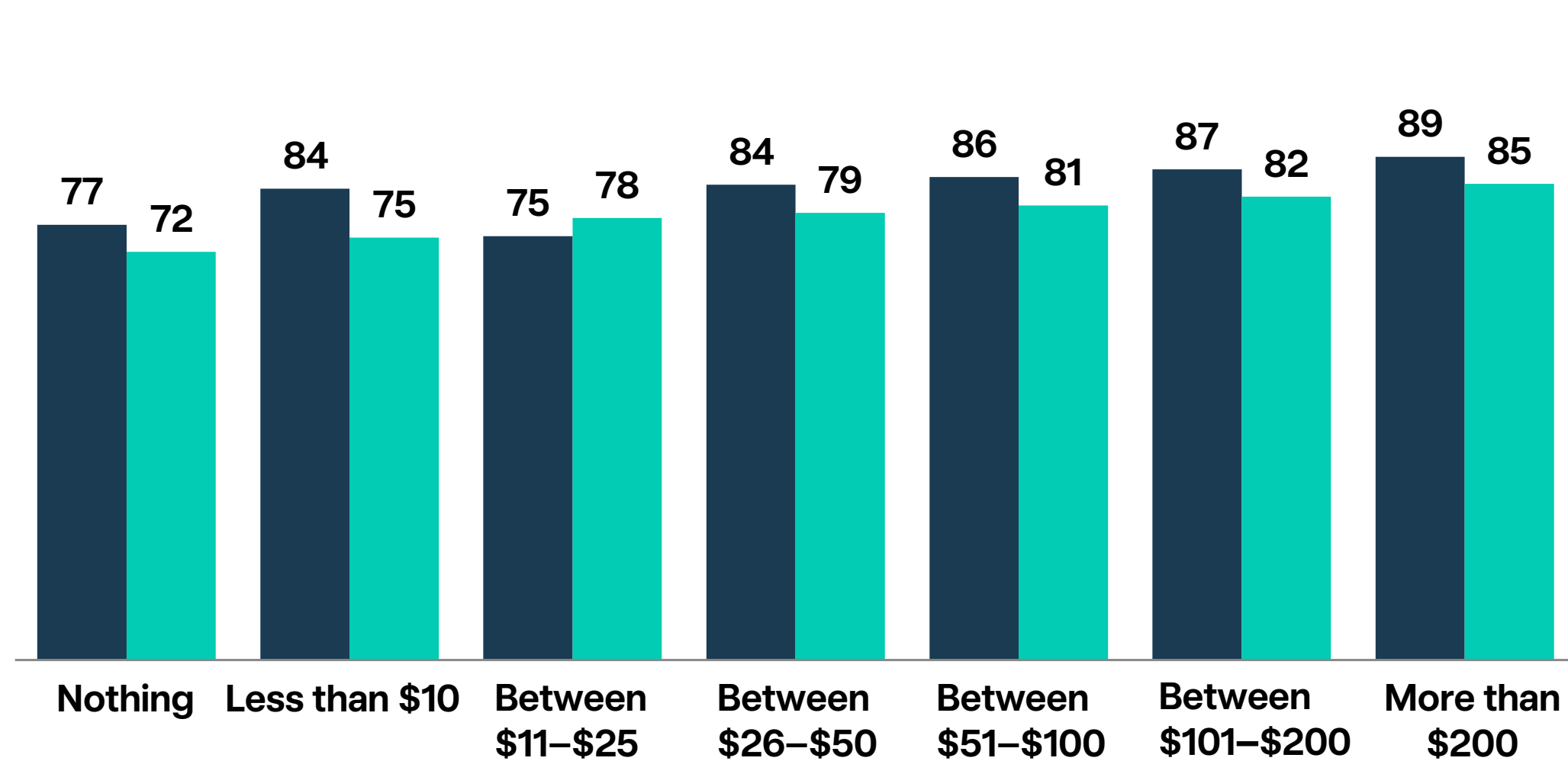


Strengthen safety to unlock spend and repeat visitation.

In 2025, perceived safety rises with spend (highest among \$200+ shoppers) and with visit frequency (weekly visitors feel safest; one-off visitors the least). This pattern shows that visible safety improvements don't just reassure customers – they support higher-value trips and habitual visitation.

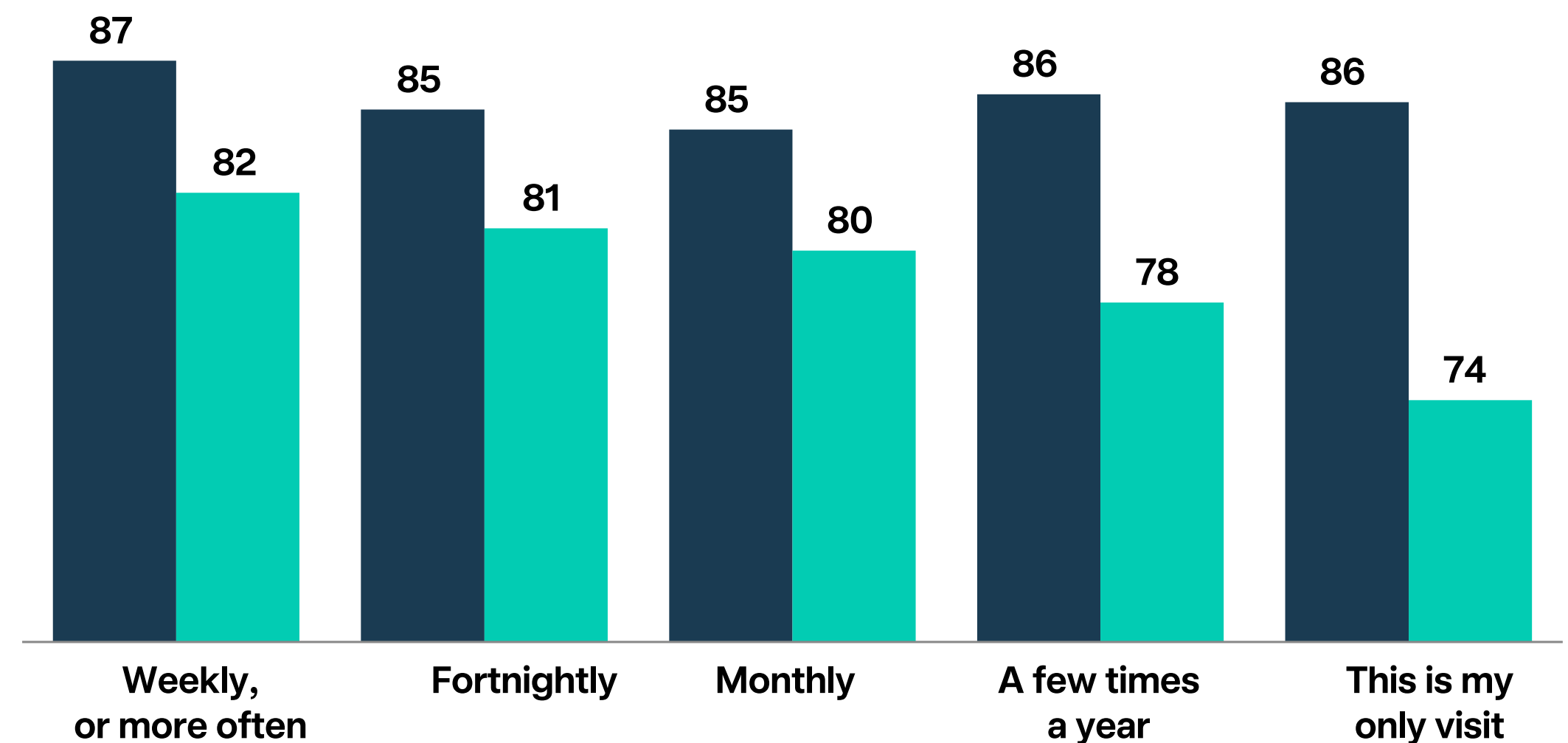
Priorities that pay back: brighter lighting and sightlines, staffed presence in car parks and family facilities, rapid cleaning/repairs, and clear multilingual wayfinding to lift occasional visitors toward regular, higher-spend behaviour.

Safety Scores by Spend



Safety Scores by Frequency of Visitation

(out of 100)



■ 2024 ■ 2025

Compared with 2024, safety comments are more location-specific – especially car parks and parents' rooms, then restrooms and entry areas – and focus on the signals that make people feel safe: lighting and sightlines, cleaning cues, and occasional staff presence.

Safety language in 2025 shifts to hotspots and visible management.

+500%
'Surveillance'

+400%
'CCTV'

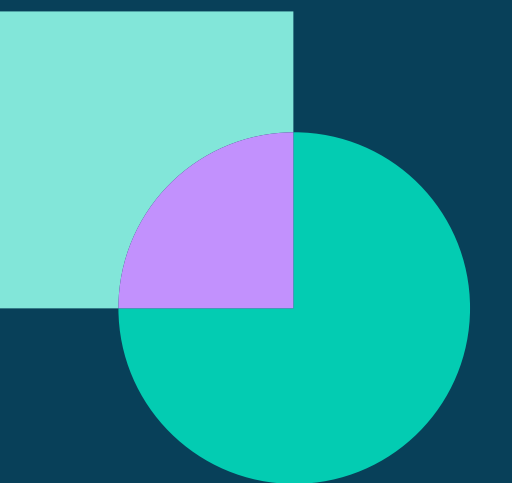
+450%
'Protection'

06

Learning from the Leading Centres



Top performers win by nailing fundamentals and making family spaces and digital services genuinely helpful – then layering in well-run activations. Their playbook: reduce friction, raise confidence, and turn occasional visitors into preferred, higher-value customers.

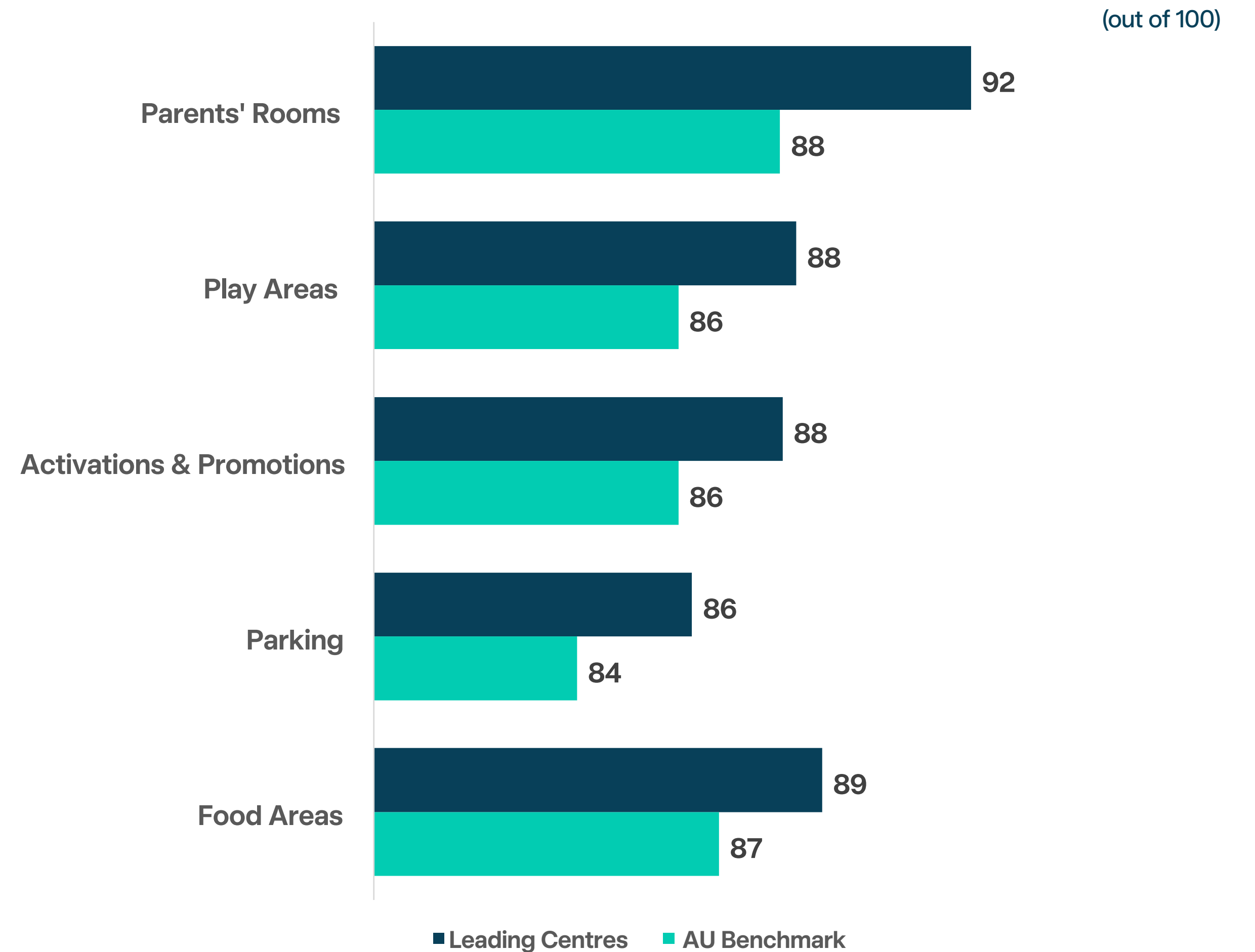


Leading centres excel where families dwell.

Leading centres score higher than the Australian benchmark across every featured touchpoint, with the biggest edges in Parents' Rooms (+4), then Play Areas (+2) and Activations and Promotions (+2). Parking (+2) and Food Areas (+2) also outperform.

These spaces shape family visits – the highest-spend, most frequent segment – so consistent quality here converts directly into stronger loyalty and revenue.

Leading Centres: Touchpoint Satisfaction



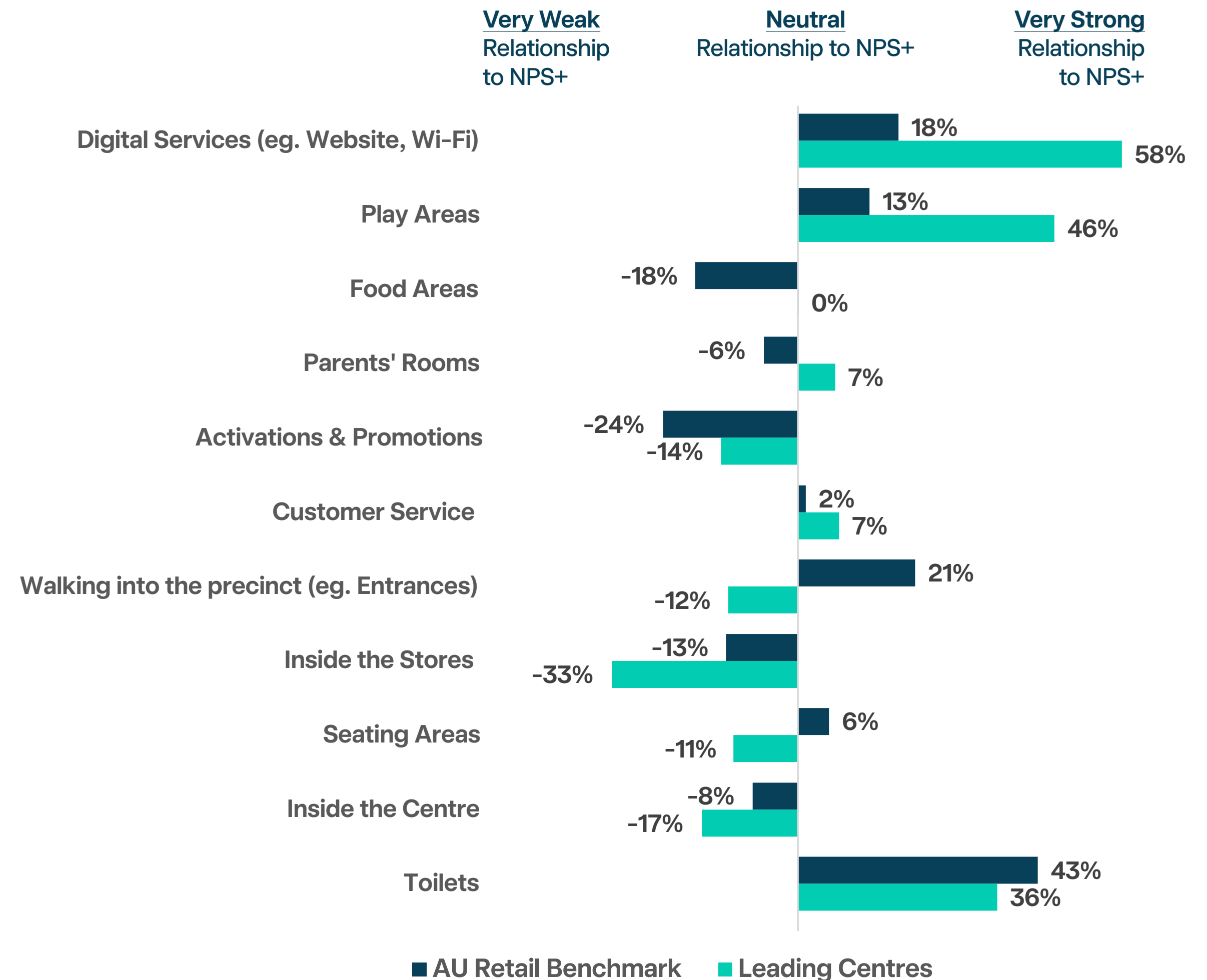
Leading centres make digital and family amenities true sentiment drivers.

Linear regression analysis shows materially higher driver weights in leading centres versus the AU benchmark: Digital Services (18% to 58%), Play Areas (13% to 46%), Food Areas (–18% to 0%) and Parents’ Rooms (–6% to 7%). In average centres these touchpoints are weak or neutral; in leaders they meaningfully shift advocacy – proof that reliable digital support and well-kept family spaces convert directly into higher NPS+.

What is Linear Regression?

This type of analysis finds the best-fitting straight line that links an outcome to assess the strength of the relationship between the two factors (e.g., NPS+) to one or more inputs (e.g., touchpoint satisfaction).

Leading Centres: Touchpoints Related to NPS+



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