



# Get a Firm Grasp of Shopper Sentiments Post Covid-19

PPK Malaysia Virtual Teh Tarik Talk #8

26 Oct 2021

# WE ARE S-PAC



Research-focused  
retail consultancy



Your research  
partner throughout  
product lifecycle



Proudly  
homegrown



Local insights,  
international standards

# PPK's RESEARCH PARTNER

## PPK Malaysia Shopping Industry Survey 2020

**P**PK Malaysia conducted a survey among its members to gather the latest industry figures including on mall operating expenses. This was the ninth industry survey that PPK had conducted since 2002. These surveys are important in assisting both asset owners and decision-makers to develop key benchmarks for optimal management of shopping malls.

The survey was conducted in collaboration with Stratos Pinnacle Sdn Bhd, a market research company, using self-administered email questionnaires<sup>1</sup>.





# Ready for relaunch! But...



**The game has  
definitely changed...  
but to what extent?**





**How much of  
what we know  
about our  
customers are  
still valid?**



**Are you hearing  
the signal or  
the noise?**

**This was NOT my  
spontaneous idea**



Introducing...

# The S-PAC Retail Recovery Tracker



# THE BACKGROUND



Launched in  
**September**  
**2021**



**Weekly**  
tracking  
survey of  
shoppers

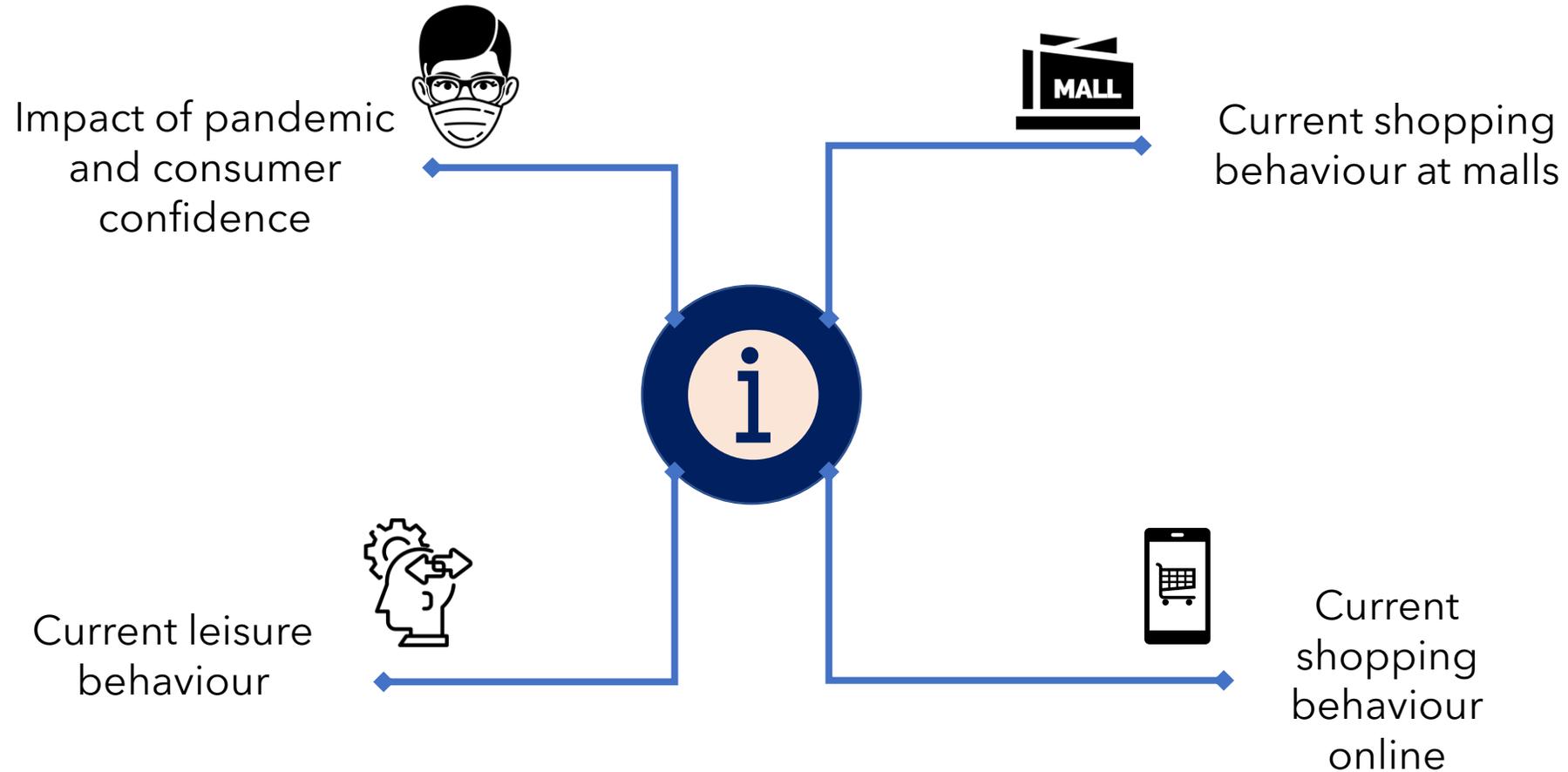


**900+**  
**shoppers**  
month

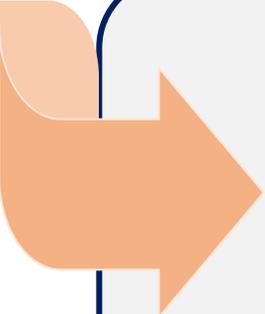


**Continuous**  
**tracking**  
- see the  
changes and  
trends over  
time

# INFORMATION COVERAGE

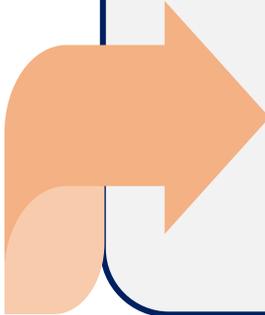


# “MADE FOR YOU”



## UNLIKE OTHERS

There are many reports and surveys out there about consumer behaviour during and post pandemic.



## MADE FOR MALLS

S-PAC Retail Recovery Tracker is crafted specifically with shopping malls in mind.



## FORMAT & LOCATION SPECIFIC

Not just retail and shopping in general, but zoomed in to malls.

# GEOGRAPHICAL COVERAGE



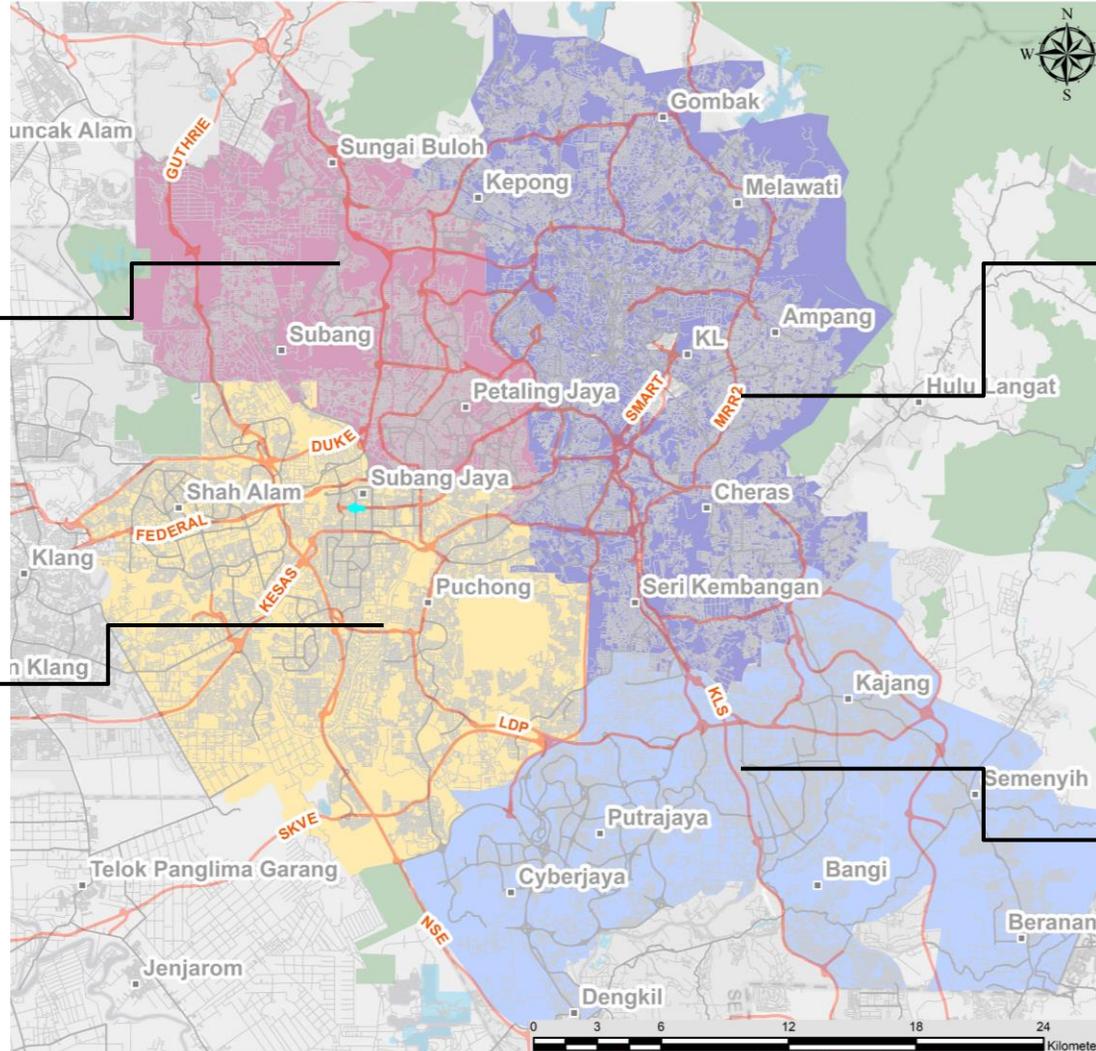
## DAMANSARA

Kota Damansara, Subang North, PJS 11-13, PJS 3-6, Bukit Gasing, Sg Buloh, Elmina, Tropicana, Bandar Utama, TTDI, Damansara Utama, Bandar Sri Damansara, Damansara Damai, Kelana Jaya, SS2



## PUCHONG, SUBANG JAYA, SHAH ALAM

Puchong, Bandar Kinrara, Subang Jaya, Bandar Sunway, Shah Alam, Bukit Jelutong



## KUALA LUMPUR

Kepong, Segambut Bukit Jali & OUG, Sg Buloh, Elmina City, Ampang Hilir, KL City, Seputeh, Salak South, Bandar Sri Permaisuri, Sri Gombak, Selayang, Maluri, Ampang, Ukay, Kementah, Sri Kembangan



## KLANG VALLEY SOUTH

Bangi, Kajang, Semenyih, Cyberjaya, Putrajaya, Serdang

# "THE RESTART"

*KEY INSIGHTS FROM THE S-PAC*  
**RETAIL RECOVERY TRACKER**  
**CHAPTER 1**

# TYPES OF SHOPPERS

## Mall Visitors

Visit mall only +  
mall & online

**22%**

## Online Shoppers

Mall & online +  
online only

**36%**

## Mall avoiders

Online only +  
non-mall\* visitors

**78%**

*\* Including those who only shopped at hypermarkets,  
supermarkets and street shops*

(Total N = 955)

# MALL VISITORS

*KEY INSIGHTS FROM THE S-PAC*  
**RETAIL RECOVERY TRACKER**  
**CHAPTER 1**

# MALL VISITORS SEPT 2021

**42%**

*visited neighbourhood malls*

**51%**

*spent 1-5 hours in the mall*

**74%**

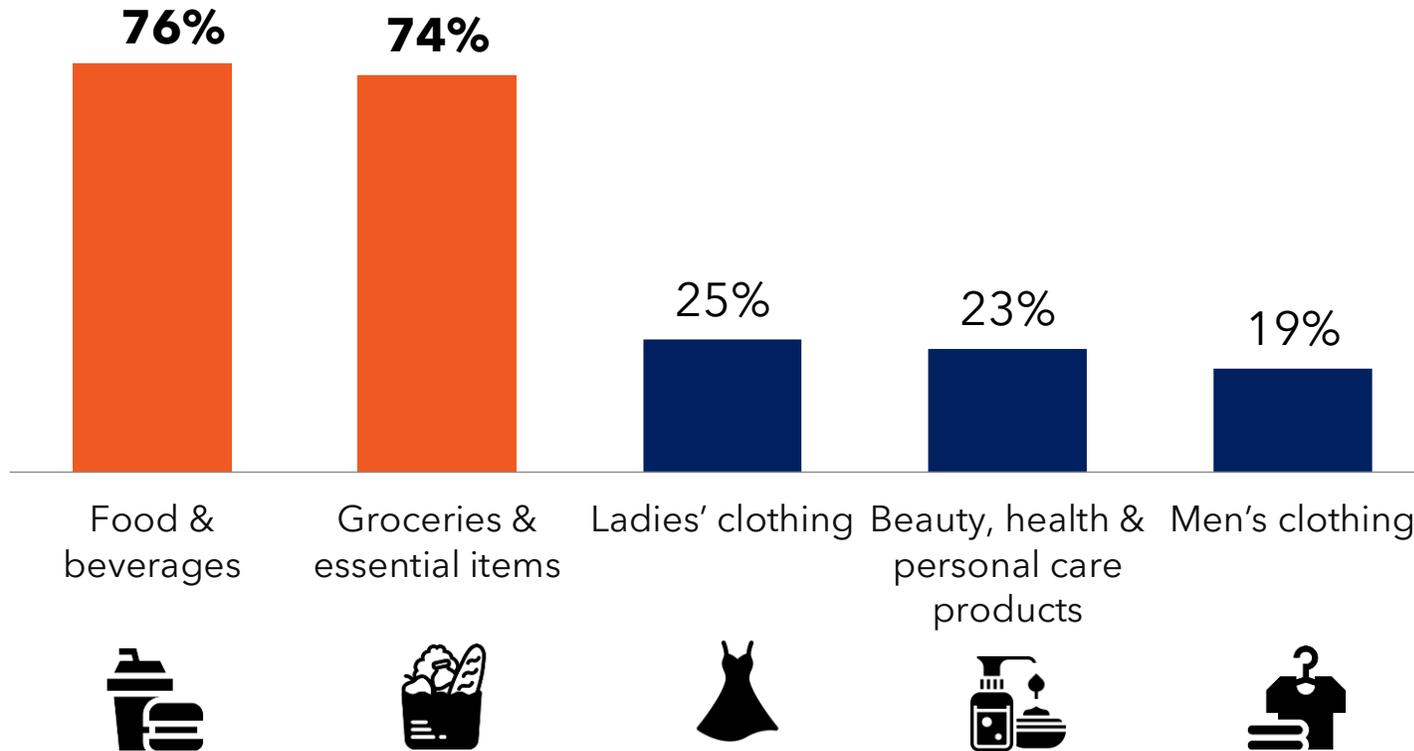
*visited malls on weekends*

# TYPE OF MALL VISITED

Mall Type / Week	1	2	3	4
<b>N</b>	<b>42</b>	<b>66</b>	<b>65</b>	<b>37</b>
Super-regional Mall	31.2%	27.3%	44.6%	46.1%
Regional Mall	39.3%	16.5%	28.1%	37.0%
Neighbourhood Mall	50.5%	54.7%	37.0%	19.9%
Others	5.9%	1.6%	5.6%	6.2%

Note : This is a multiple response question, hence percentages will not add up to 100%.

# TYPE OF PRODUCTS PURCHASED



*Note : This is a multiple response question, hence percentages will not add up to 100%.*

# TYPE OF PRODUCTS PURCHASED

Categories / Week	Total	1	2	3	4
N	210	42	66	65	37
Food & beverages	77.10%	70.60%	75.70%	83.50%	75.50%
Groceries & essential items	74.30%	60.20%	79.50%	81.50%	68.20%
Ladies' clothing	24.70%	17.40%	28.10%	20.90%	33.60%
Beauty, health & personal care products	22.60%	31.40%	24.00%	21.50%	11.80%
Men's clothing	19.40%	13.20%	13.00%	22.40%	33.00%
Children & maternity	10.10%	5.90%	16.90%	5.70%	10.60%
Home living / décor / furnishing items / DIY	8.40%	16.10%	7.00%	5.70%	6.80%

# OTHER MALL SHOPPING BEHAVIOUR

## Pre-pandemic

Frequency of visit

**2.18x /month**

Average time spent

**2hr 12mins**

Average RM spent

**RM734.34**

## Sept 2021

Frequency of visit

**1.61x /month** ▼

Average time spent

**1hr 24mins** ▼

Average RM spent

**RM505.30** ▼

# ONLINE SHOPPERS

*KEY INSIGHTS FROM THE S-PAC*  
**RETAIL RECOVERY TRACKER**  
**CHAPTER 1**

# TYPE OF PRODUCTS PURCHASED

PRODUCTS PURCHASED ONLINE (TOP 5)



Note : Excluding food delivery

PRODUCTS PURCHASED AT MALLS (TOP 5)



Note : This is a multiple response question, hence percentages will not add up to 100%.

# OTHER ONLINE SHOPPING BEHAVIOUR

**Pre-pandemic**

*Visit to online stores*

**1.58x /month**

*Spent on online products*

**RM164.90**

**Sept 2021**

*Visit to online stores*

**1.98x /month ▲**

*Spent on online products*

**RM297.80 ▲**

**67%**

*will continue to shop online but with **reduced spending** as purchases will be made during physical shopping trips*

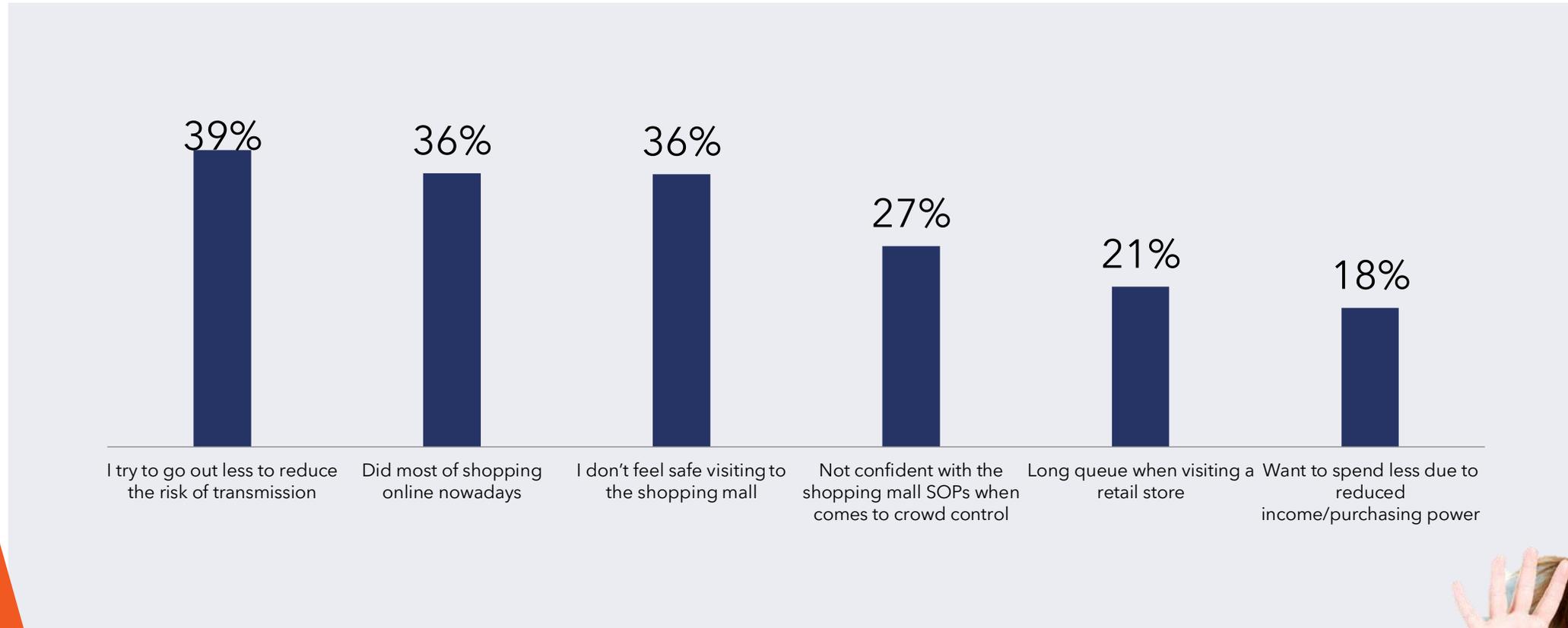
**31%**

*will continue to shop online **without reducing online spending***

# MALL AVOIDERS

*KEY INSIGHTS FROM THE S-PAC*  
**RETAIL RECOVERY TRACKER**  
**CHAPTER 1**

# TOP REASONS FOR AVOIDING MALLS



**62%**

*are not confident to shop at malls*

## **Reasons**

- *The number of Covid-19 cases reported in Malaysia and Klang Valley*
- *The high death rate due to the Covid-19 infections.*

# IMPLICATIONS TO MALLS

*KEY INSIGHTS FROM THE S-PAC*  
**RETAIL RECOVERY TRACKER**  
**CHAPTER 1**



**OMNI CHANNEL  
SHOPPING IS  
THE NORM**

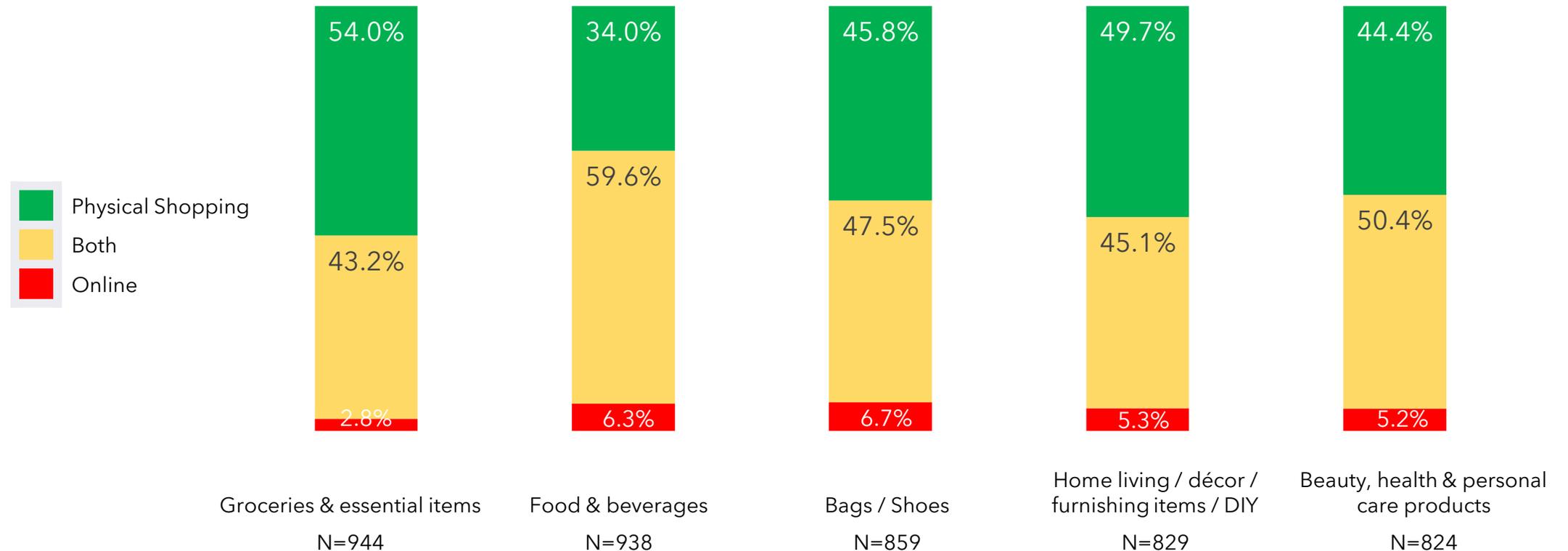


**OMNI FORMAT  
FOR PHYSICAL  
RETAIL**



**KEY  
CATEGORIES TO  
WATCH OUT FOR**

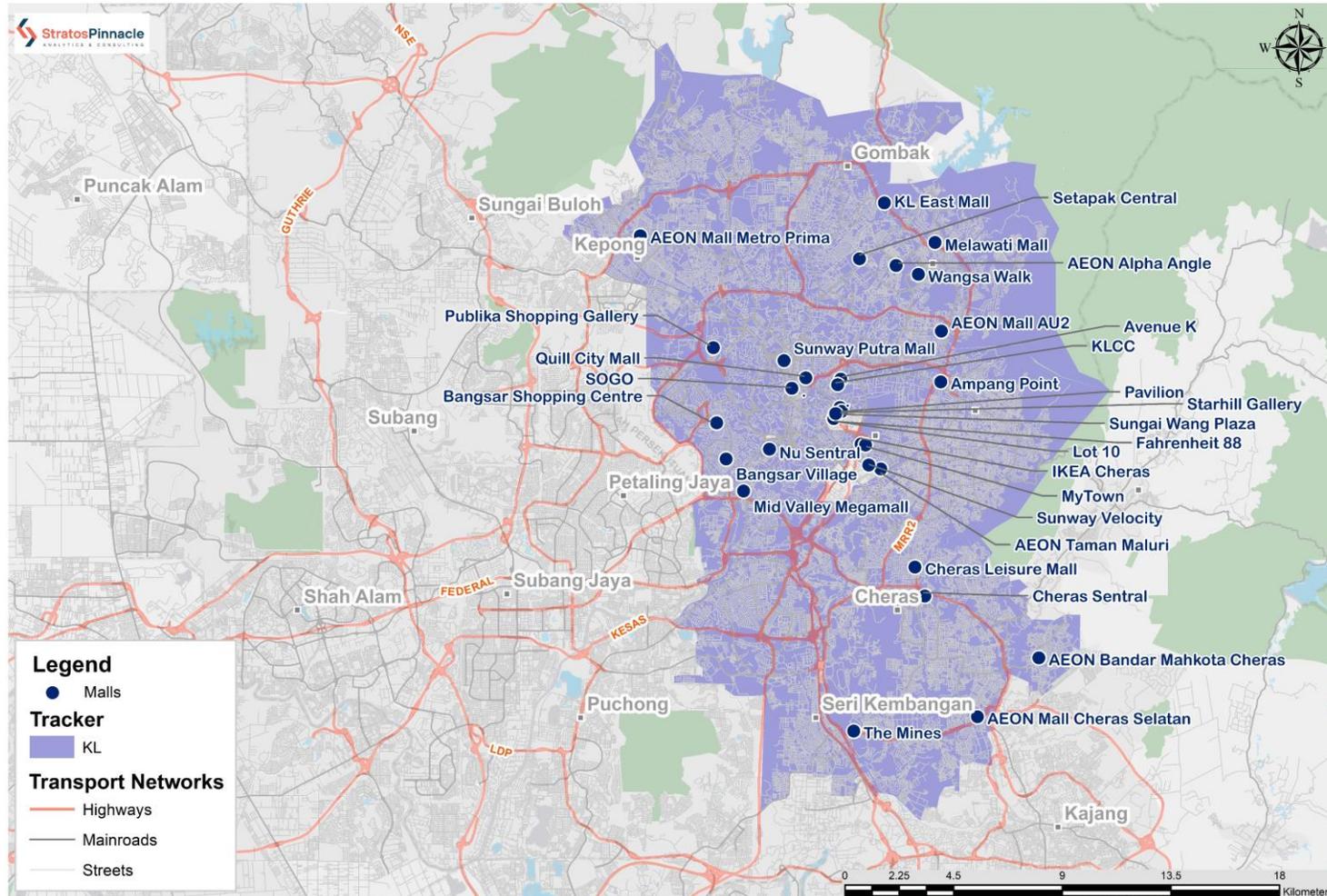
# TOP ITEMS INTEND TO PURCHASE (WHEN ALL ECONOMIC SECTORS ARE ALLOWED TO REOPEN)



# ADDITIONAL CUSTOMISED SOLUTIONS

*There's more when you subscribe!*

# PROFILE BY AREA



## KL TRACKER

- Which malls in the KL area have the best and poorest performance in terms of visitation and consumer spending?
- What are other out-of-home and recreational activities completed in the previous week?
- What are the best and worst performing expenditure categories?

# PROFILE BY AREA

	KV South	KL	Puchong, Subang Jaya & Shah Alam	Damansara, TTDI & PJ
N	112	501	207	135
Mall Visitors	11.5%	23.0%	23.9%	24.1%
Online Shoppers	9.5%	38.2%	41.3%	41.1%
Mall Avoiders	88.5%	77.1%	76.1%	75.6%

# PROFILE BY SPECIFIC MALL

<i>Mall A</i>	<RM5k	RM5k-RM9.9k	RM10k+
Below RM100	11.5%	-	14.1%
RM100 - RM199	-	12.1%	16.5%
RM200 - RM299	23.0%	28.3%	20.0%
RM300 - RM399	42.6%	31.3%	-
RM400 - RM499	-	14.1%	-
RM500 or above	23.0%	14.1%	49.4%
Average Spending	RM321	RM365	RM470

<i>Mall B</i>	<RM5k	RM5k-RM9.9k	RM10k+
Below RM100	-	-	7.6%
RM100 - RM199	-	33.3%	-
RM200 - RM299	-	33.3%	37.0%
RM300 - RM399	-	16.7%	27.7%
RM400 - RM499	-	-	18.5%
RM500 or above	100.0%	16.7%	9.2%
Average Spending	RM700	RM293	RM307

# AIMING TO **RELAUNCH** WITH CONFIDENCE?

**SPEAK TO US!**



**Teoh Wei Cheng**, *S-PAC Managing Director*



**+60 12-264 6870**

[weicheng.teoh@spac.com.my](mailto:weicheng.teoh@spac.com.my)



**Lim Zhen Hui**, *S-PAC Associate Director*,



**+60 16-328 7830**

[zhenhui.lim@spac.com.my](mailto:zhenhui.lim@spac.com.my)



**Tina Leong**, *Executive Director*



**+60 12-296 6418**

[tina.leong@spac.com.my](mailto:tina.leong@spac.com.my)

# THANK YOU!

**Stratos Pinnacle Sdn Bhd**

Signature 2 (VO6),  
VO6-07-02 (7th Floor), Lingkaran SV,  
Sunway Velocity, Jalan Shelley,  
55100 Kuala Lumpur.

+603 2856 0227

hello@spac.com.my

**Stratos Pinnacle**

