

CUSTOMER VOICE INSIGHTS

Sector Year-on-Year Customer Voice Report

STATE OF NAIROBI MALLS 2025

38 shopping centres · 14,486 reviews in 2025 · compared with 2024 ·

*What changed in Nairobi's malls between 2024 and 2025 —
and what the movement means for footfall.*

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Confidential — Customer Voice Insights · Nairobi retail sector



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Executive Summary • Sector Year-on-Year Customer Voice Report

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THE SECTOR IN 2025 (CHANGE FROM 2024)

AVG RATING 4.55 ▲ from 4.52	POSITIVE 90.7% ▲ from 89.4%	REPLY RATE 12.4% ▲ from 8.9%	PARKING GRIPES 23.3% ▲ from 18.5%
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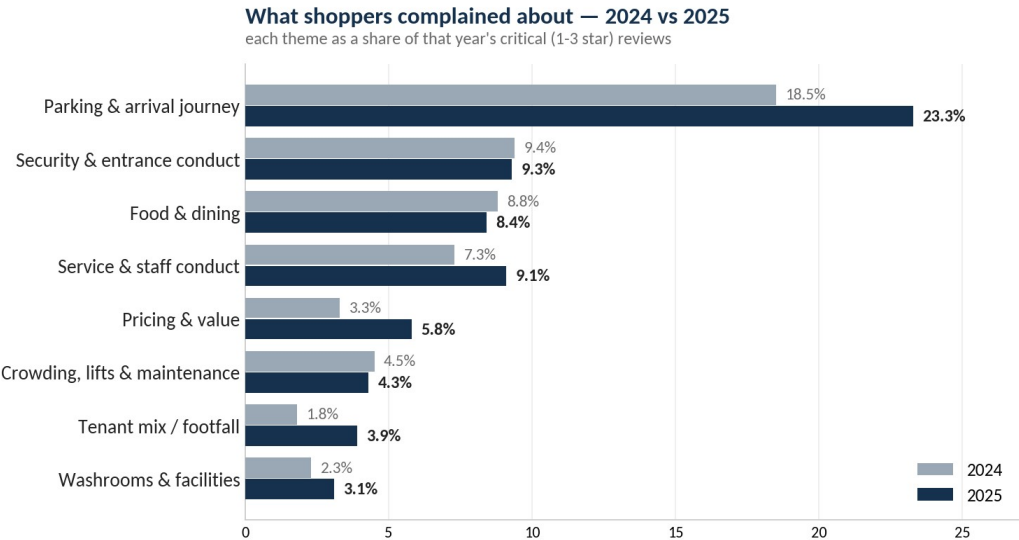
The headline

2025 was a quietly better year. The sector's average rating rose to 4.55, positive reviews to 90.7%, and — the clearest win — malls began replying to reviewers, lifting the reply rate from 8.9% to 12.4%. The smaller, lower-rated centres improved most, so the floor came up.

But the complaint mix shifted the wrong way underneath. Among shoppers who complained, the arrival journey grew more dominant (18.5% → 23.3%) and pricing-and-value complaints nearly doubled (3.3% → 5.8%). The sector improved on average while its loudest, most controllable friction point got louder.

◆ What Moved, 2024 → 2025

Measure	2024	2025	Movement
Average rating	4.52★	4.55★	▲ +0.03
Positive (4-5★)	89.4%	90.7%	▲ +1.3 pts
Reply rate (written)	8.9%	12.4%	▲ +3.5 pts
Parking / arrival (share of complaints)	18.5%	23.3%	▲ worse
Pricing & value (share of complaints)	3.3%	5.8%	▲ up sharply
Tenant mix / empty units	1.8%	3.9%	▲ doubled



THE 2026 PRIORITY

The rising tide didn't lift the arrival journey. Fix it first — modern card/mobile parking payment, transparent pricing, gate-flow — and finish closing the response gap the sector just proved it can move. Praise held steady (food, variety, clean space, family appeal), so the strengths are intact; the work is on the friction that grew.

About this summary: Two fixed, like-for-like calendar cohorts across the same 38 malls: 2024 (17,532 reviews) and 2025 (14,486). Themes compared as each theme's share of its year's reviews, so differing volumes don't distort movement. Malls are named only in the full report's ranking exhibits; review examples are de-identified. Full report *State of Nairobi Malls 2025*, and the underlying verbatim, available from CVI: Adrian Leshan, Business Lead, +254 705 495016, hello@cvi.co.ke, cvi.co.ke.