FACTORS INFLUENCING PATRONAGE AND SPENDING PATTERNS AT BAYSIDE AND TYGER VALLEY SHOPPING CENTRES

By MOESTAQEEM ESAU

Thesis presented in partial fulfilment of the requirements for the degree in Master’s in Urban and Regional Planning in the Faculty of Arts and Social Sciences at Stellenbosch University

Supervisor: Lodene Willimse

December 2020

AUTHOR'S DECLARATION

By submitting this thesis electronically, I declare that the entirety of the work contained therein is my own, original work, that I am the sole author thereof (save to the extent explicitly otherwise stated), that reproduction and publication thereof by Stellenbosch University will not infringe any third party rights and that I have not previously in its entirety or in part submitted it for obtaining any qualification.

Date: 30 November 2020

ABSTRACT

The shopping centre is a powerful symbol of American consumerism that forms part of the global urban fabric. Despite its decline and redundancy in many regions of the world, its widespread consumer support and developments have positioned South Africa's shopping centre industry as one of the largest in the world. Since 1994 South Africa has undergone significant political and social transformations. The process changed the formal economy and introduced a diverse group of consumers. The growth of the black middle-income consumer created a demand for products and services that were almost exclusive to the white consumer. During 2008 the growth of a black middle-income had a combined annual spending power of approximately R 130 billion. It had dramatically changed the target market characteristics of the South African consumer. Research in shopping centre patronage is scant, particularly in post-apartheid South Africa. The study aimed to determine the factors that influence patronage and spending patterns at Bayside and Tyger Valley shopping centres in Cape Town. This was achieved through semi structures interviews with centre management, store owners/management as well as rapid appraisals with patrons. The key findings showed that shopping centre patronage is not guaranteed however it was a result of centre managements and tenants' cooperation and their implementation of various marketing strategies. Furthermore, patrons were motivated by convenience in terms of shopping centre location and a well-balanced tenant mix to satisfy their consumer needs. Although the majority of patrons were satisfied with their shopping experiences aspects such as poor customer service and the absence of facilities such as trolleys and fitting rooms created a poor retail image and resulted in the abandonment of sales.

Keywords and phrases:

Shopping Centres

Marketing Strategies

Consumer Behaviour

Patronage

OPSOMMING

Winkelsentrums dien as ‘n sterk simbool van Amerikaanse verbruikers dienste wat deel vorm van ‘n wêreldwye stedelike leefstylen helm. Ten spyte van die afname en oortolligheid in baie dele regoor die wêreld, het dit ‘n wydverspreide en volgehoue aantal verbruikers en ondersteuning in die Suid-Afrikaanse winkelsentrum-bedryf. Sodoene het dit Suid-Afrika se winkelsentrum-bedryf in een van die grootstes ter wêreld ontwikkel. Sedert die aanvangs van demokrasie in 1994 het Suid-Afrika ‘n radikale bedryfs tranformasie ondergaan van beide polities en sosiaal. Hierdie proses het nie net die ekonomie verbeter nie, maar ook die diversiteit van die verbruikers klas. Die groei in die swart gemiddelde-inkomste het ‘n groter aanvraag veroorsaak vir produkte en dienste wat voor 1994 tradisioneel vir blanke verbruikers geproduseer was. Gedurende 2008 het die gemiddelde jaarlikse koopkrag vir swart verbruikers tot ‘n geraamde R130 miljard gegroei. Dít het die eienskappe van die Suid-Afrikaanse teiken-mark drasties verander. Navorsing toon dat die ondersteuning van winkelsentrums drasties afgeneem het, veral na apartheid. Die mikpunt van die studie is om die faktore wat die verbruikers en hul bestedings patrone beïnvloed vas te stel en is by Bayside en Tyger Valley sentrums in Kaapstad afgelê deur middel van onderhoude met die bestuurders van die sentrums, winkeleienaars en ook verbruikers. Die resultate toon dat verbruikers in winkelsentrums nie gewaarborg is nie, maar dat dit ‘n uitlopende resultaat van verskeie bemarking strategieë is. Verdere resultate bewys ook dat verbruikers die winkelsentrums gemaklik en bereikbaar vir talle woonbuurte vind. Alhoewel die meerderheid van verbruikers tevrede is met hul ervaring in winkelsentrums is daar wel faktore wat die verkope en aankope kan affekteer. Hierdie faktore sluit in swak klantediens en ‘n tekort aan dienste soos aanpashokkies en winkel trollies wat die proses van aankope vergemaklik.

Trefwoorde en frases:

Winkelsentrums

Bemarking-strategieë

Verbruiker Gedrag

Patroonaatskep

ACKNOWLEDGEMENTS

I would like to express my sincere appreciation to the following people and organisations for their assistance and support:

My family and friends
The Masakhi'Sizwe Foundation
Academic supervisor Lodene Willimse

CONTENTS

Page

CHAPTER 1: SETTING THE SCENE.....1
1.1 INTRODUCTION 1
1.2 THE RESEARCH PROBLEM 2
1.3 RESEARCH QUESTIONS.....3
1.4 RESEARCH AIMS AND OBJECTIVE..... 3
1.5 METHODOLOGY..... 3
1.5.1 Study Area..... 3
1.5.2 Data collection.....8
1.5.3 Data analyses..... 9
1.6 CLASSIFICATION AND HIERARCHY OF SHOPPING CENTRES IN SOUTH AFRICA..... 9

CHAPTER 2: LITERATURE REVIEW..... 11
2.1 INTRODUCTION..... 11
2.2 PERSPECTIVES ON THE DEVELOPMENTAL CHARACTERISTICS OF SHOPPING CENTRES IN THE DEVELOPED WORLD... 12
2.3 PERSPECTIVES ON THE DEVELOPMENTAL CHARACTERISTICS OF SHOPPING CENTRES IN THE DEVELOPING WORLD.....19
2.4 THE SOUTH AFRICAN PERSPECTIVE.....22
2.5 RETAIL STRATEGY.....27
2.6 RETAIL IMAGE.....28
2.7 CONSUMER BEHAVIOUR.....30
2.7.1 Defining consumer behaviour.....31
2.7.2 The consumer decision-making model..... 31
2.8 MOTIVATION FOR SHOPPING CENTRE PATRONAGE.....33
2.8.1 Aesthetics.....34
2.8.2 Merchandise and Tenant Mix.....34
2.8.3 Social Interactions.....35
2.8.4 Entertainment 35
2.8.5 Available Facilities.....36

Page

2.8.6 Convenience.. 36

CHAPTER3: RESULTS AND DISCUSSION...38

3.1 INTRODUCTION...38

3.2 FACTORS ATTRACTING SHOPPING CENTRE PATRONAGE..................................38

3.3 FACTORS INFLUENCING AND DISCOURING PATRONAGE AND SPEND.............39

3.4 IMPROVING FOOT COUNT AND SPEND...41

3.5 STORES THAT ATTRACT THE MOST AND THE LEAST PATRONS........................43

3.6 BUSIEST PERIODS AND LEAST BUSY PERIODS...44

3.7 CENTRE MANAGEMENT CHALLENGES..44

3.8 SHOPPING CENTRE GROWTH PATTERNS...45

3.9 PATRON PERCEPTIONS: PRIMARY REASONS FOR PATRONAGE.........................46

3.10 PATRON PERCEPTIONS: WHAT ATTRACTS PATRONS..49

3.11 PATRON PERCEPTIONS: DISTANCE TRAVELLED..51

3.12 PATRON PERCEPTIONS: VISITATION FREQUENCY..53

3.13 PATRON PERCEPTIONS: DWELL TIME...54

3.14 PATRON PERCEPTIONS: PREFERRED SHOPPING DESTINATION....................... 56

3.15 PATRON PERCEPTIONS: ALTERNATIVE SHOPPING DESTINATIONS..................57

3.16 PATRON PERCEPTIONS: PLANNED OR UNPLANNED PURCHASE?......................58

3.17 PATRON PERCEPTIONS: PREFERRED VISITATION PERIODS...............................60

3.18 PATRON PERCEPTIONS: SATISFACTION LEVELS...61

CHAPTER 4: CONCLUSION...63

4.1 LIMITATIONS OF THE STUDY...65

4.2 RECOMMENDATIONS FOR FUTURE RESEARCH...65

REFERENCES...66

PERSONAL COMMUNICATION…………………………………………………………….82

TABLES

Page

Table 1.1 Location of Bayside and Tyger Valley shopping centres..10
Table 2.1 LSM of racial groups between 1998-2008...25
Table 2.2 Components of a retail marketing mix..30
Table 2.3 Elements of a shopping environment...33
Table 3.1 Performance Measures.. 46
Table 3.2 Average spend per head at the store level...46
Table.3.3 Alternative shopping destinations 58

FIGURES

Page

Figure 1.1 Location of Bayside and Tyger Valley shopping centres....4
Figure 1.2 Store layout of Bayside shopping centre....5
Figure 1.3 Lower-level store layout of Tyger Valley shopping centre....6
Figure 1.4 Upper-level store layout of Tyger Valley shopping centre....7
Figure 2.1 Elements of a retail strategy....27
Figure 2.2 Elements of a retail image....30
Figure 2.3 A simplified model of consumer behaviour....33
Figure 3.1 Main reasons for patronage.... 47
Figure 3.2 What attracts shopping centre patronage....50
Figure 3.3 Distance travelled to the shopping centre....52
Figure 3.4 Frequency of visitation....53
Figure 3.5 Dwell time....55
Figure 3.6 Primary destination for shopping....56
Figure 3.7 Preferred shopping alternatives....57
Figure 3.8 Spending more than planned....59
Figure 3.9 Best time to visit the shopping centre....61
Figure 3.10 Shopping experience....62

APPENDICES

Page

Appendix A: Consent to conduct research at Bayside shopping centre..83

Appendix B: Consent to conduct research at Tygervalley shopping centre........................... 84

Appendix C: Informed consent and semi-structured interview questionnaire
for centre management................. 85

Appendix D: Informed consent and semi-structured interview questionnaire
for store management.. 89

Appendix E: Consent form and rapid appraisal questionnaire for patrons.......................................92

ABBREVIATIONS AND ACRONYMS

Page

Living Standard Measures (LSM)....1
Gross Leasable Area (GLA).... 4
Humanities Research Ethics Committee (HREC)....9
International Council of Shopping Centres (ICSC)....11
Central Business District (CBD)....13
World War Two (WWII)....13
Foreign Direct Investment (FDI)....19

CHAPTER 1: SETTING THE SCENE

1.1 INTRODUCTION

The shopping centre is commonly found across the world and is an integral feature of the modern urban and retail landscape. It is a symbol of American consumerism that catapulted the nation to the forefront of shopping centre developments. They were designed at various scales and formats with the purpose to introduce patrons to a new and exciting shopping experience (Dawson 1983). The shopping centre was introduced in South Africa around the mid-1960s and was based on the American shopping centre model. Its prominence can be attributed to the tremendous growth of the retail industry. To date, the country has the highest number of shopping centres on the African continent that spans over 24 million m² of shopping floor space (Prinsloo 2018). The phenomenon is unique as planned and unplanned retail development uses are approximately at the same level and are indicative of the exponential growth over the last 25 years (Prinsloo 2010a).

The retail industry is currently challenged by changes in the lifestyle, cultural, demographic as well as the overall behaviour of consumers. This has been a result of a shift in the new political dispensation of 1994 that transformed the profile of the South African consumer. The profile has broadened from the traditional white affluent consumer to a heterogeneous consumer that is characterized by different cultures and nationalities (Brytenbach 2014). Furthermore, retail growth is directly influenced by urbanisation, the growth of a population as well as socio-economic change. Also, the migration of people from rural to urban areas as well as the number of people that fell into the category of Living Standard Measures (LSM) 4 - 6 and 7 – 10 showed a higher demand for diverse products and services (Prinsloo 2010a).

A study revealed the potential of the new consumer market. During 2008 the growth of a black middle-income had a combined annual spending power of approximately R 130 billion. It had dramatically changed the target market characteristics of the South Africa consumer (Market Tree Consultancy 2008). Although the retail industry together with the potential consumer base looked promising many challenges persisted to hinder its growth.

Some of these challenges included a weak South African economy, household budgets that were constrained by higher personal income tax, spikes in electricity and fuel prices as well as the rise of unemployment (SAPAO 2018). The internet also provided retailers and consumers with an alternative method of trading options. Despite not having a major influence on the South African retail industry its onset has exposed consumers to alternative trading opportunities such as on social media platforms and online retailers (Lusch *et al* 2011).

Since its inception, the growth of the shopping centre has rapidly expanded and positioned South Africa as one of the leading countries in its development. Due to change in the political and socio-economic climate, retailers and marketers were prompted to understand the behaviour of the emerging consumer base. Although the future is promising for the shopping centre it does not go unchallenged by many factors such as a weak economy and competition from other retail formats.

1.2 THE RESEARCH PROBLEM

Since 1994 South Africa has undergone significant political and social transformations. The process changed the formal economy and introduced a diverse group of consumers. The growth of the black middle-income consumer created a demand for both products and services that were almost exclusive to the white consumer (De Meyer & Petzer 2013). An optimistic future in the South African shopping centre industry was presented as a study indicated that black households in the upper-income category grew by 382% between 1998 and 2004 and was evident in trends of their purchasing behaviour (Dardagan 2005).

The multi-cultural facet of the consumer base indicated that retailers, shopping centre management and marketers should be more aware of the needs and preferences of all ethnic groups in South Africa. Their marketing strategies should factor in the cultural and socio-economic hierarchy of the South African market (De Meyer & Petzer 2013). The literature on shopping centre choices, patronage and consumer behaviour is scant, especially in the post-1994 South African landscape. Insight into the aforementioned aspects can enlighten the various role players in the retail and shopping centre industry to position, manage and market more effectively (Frasquet, Gil & Molle 2001).

1.3 RESEARCH QUESTIONS

1. What are the factors influencing patronage and spending patterns at Bayside and Tyger Valley shopping centres.
2. What are patrons' motivations for visiting and spending at Bayside and Tyger Valley shopping centres.

1.4 RESEARCH AIMS AND OBJECTIVES

The study aims to determine and compare factors that influence patronage and spending patterns at Bayside and Tyger Valley shopping centres in Cape Town.

The aims were achieved through the following objectives:

1. Semi-structured interviews were conducted with centre management on factors influencing patronage and spending patterns at Bayside and Tyger Valley shopping centres.

2. Semi-structured interviews were conducted with store management on factors influencing patronage and spending patterns at Bayside and Tyger Valley shopping centres.

3. Rapid appraisals were conducted with patrons on their motivations for patronage and spending patterns at Bayside and Tyger Valley shopping centres.

1.5 METHODOLOGY

1.5.1 Study Area

The study was conducted in the City of Cape Town. It is a port city that is located in the south-west coast of the Western Cape. The City of Cape Town has a population of 3 740 025 and is made up of the following groups: Coloureds 42%, Blacks 38.6%, Whites 15.7%, Indian/Asians 1.4% and other 1.9%. The last population census was conducted in 2011 and the population size has altered since then (CoCT n.d.).

Figure 1.1 indicates the primary trade areas of Bayside and Tyger Valley Shopping centres. Bayside shopping centre's catchment area is smaller than that of the Tyger Valley shopping centre. This is a result of its proximity to the Reitvlei wetland, Table Bay nature reserve and the Durbanville Hill farmlands (Bayside n.d). The shopping centre is located in the heart of the Blaauwberg area and offers over 110 stores to shop from which include a cinema and speciality stores. The store layout is illustrated in Figure 1.2. Furthermore, it offers 1900 parking bays with a GLA of approximately 45 646m² (Bayside n.d; Growth point 2005).

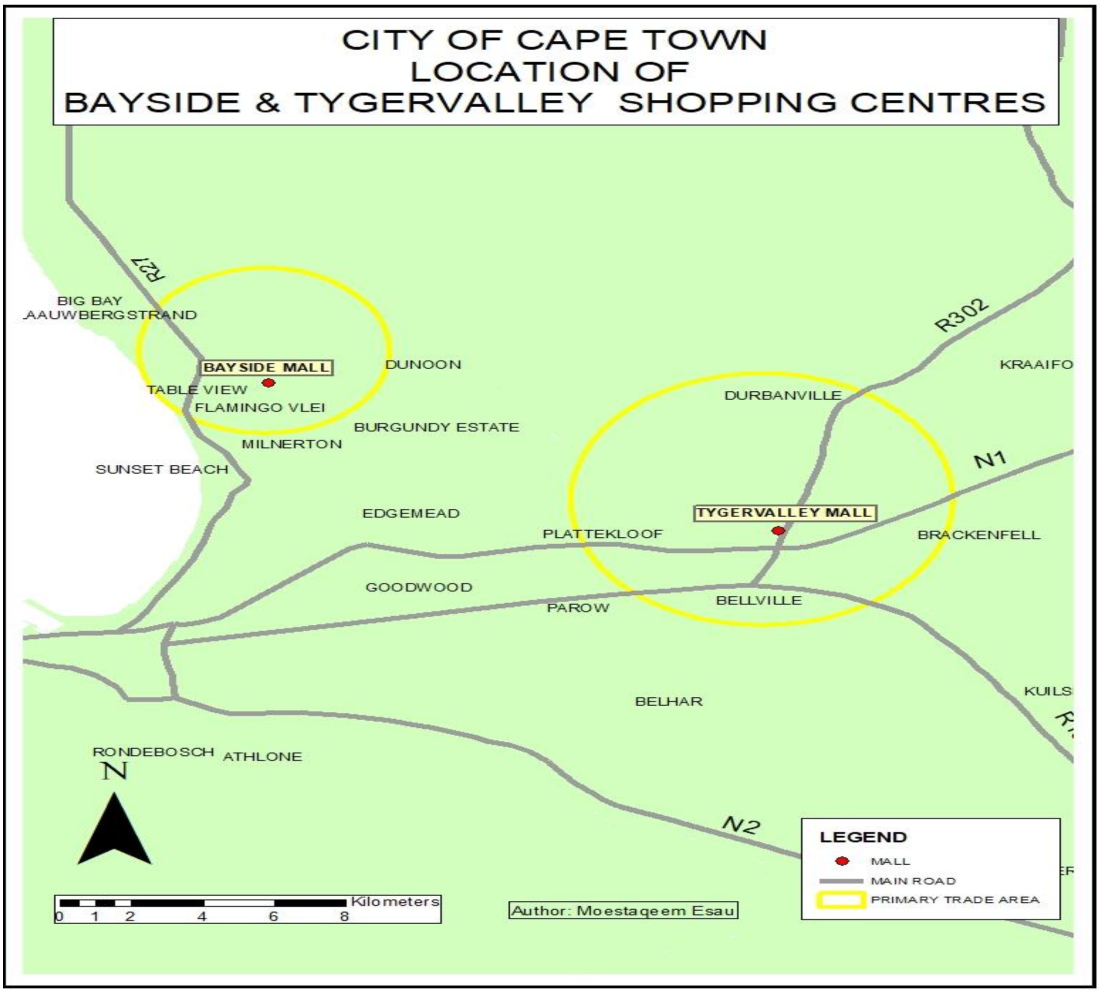

Figure 1.1 Location of Bayside and Tyger Valley shopping centres

In comparison, Tyger Valley shopping centre was established in 1985 and has a GLA (Gross Leasable Area) of approximately 88 883m² as well as approximately 6000 parking bays (Mowana Properties 2020). The shopping centre offers over 250 stores from eateries to furniture and medical services (Tyger Valley 2020). Figure 1.3 and Figure 1.4 illustrate the store layout of the shopping centre.

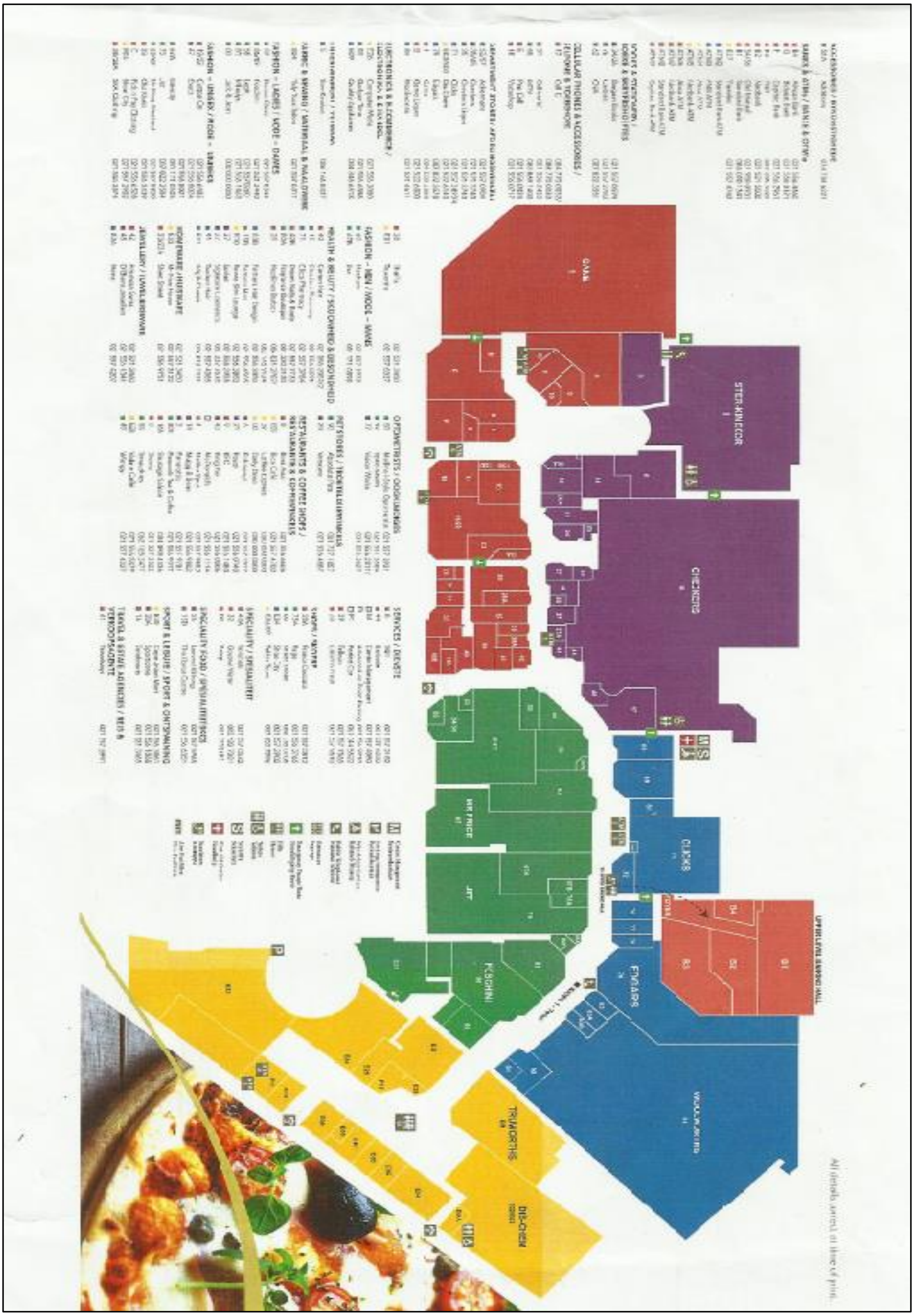

Figure 1.2 Store layout of Bayside shopping centre Source: Centre management 2019

Figure 1.3 Lower-level store layout of Tyger Valley shopping centre Source: Centre management 2019

Figure 1.4 Upper-level store layout of Tyger Valley shopping centre Source: Centre management 2019

Upon agreement, the centre managements were emailed a copy of a student research form and consent form. The email also included the questions that were asked in the semi-structured interviews (See Appendix C and Appendix D) and rapid appraisals (See Appendix E). The email addresses were obtained from the various shopping centre websites. The email detailed the nature of the research including the methods for data collection. Bayside and Tyger Valley shopping centres agreed to participate in the research study. Before conducting the semi-structured interviews an invitation to participate in the research was emailed to various shopping centre management to establish an agreement. Only shopping centres that fell within the same type of centre (regional centre) were contacted.

1.5.2 Data Collection

Roworth *et al* (2012) state semi-structured interviews are a commonly used technique in development studies. Its purpose is to identify specific themes and is carried out through a conversational style. A semi-structured interview is regarded as one of the best ways to learn about a specific topic and it often presents valuable data that was not anticipated by the researcher.

Rapid appraisals are situated between formal and informal modes of data collection and used to provide decision-related information in a development setting. Its strengths of approach to data collections are that they seldom require outside assistance and they are quick and inexpensive to implement (Kumar 1993).

The first two objectives were achieved by conducting semi-structured interviews with centre management and store owners/management at Bayside and Tyger Valley shopping centres. Tyger Valley shopping centre management determined and selected five stores from different categories to form part of the study. These categories included an anchor store, electronic, décor and furniture, a specialty store as well as a restaurant. Also, a maximum of 20 rapid appraisals was allowed to be conducted with patrons in the shopping centre. Subsequently, the same data collection parameters were applied at the Bayside shopping centre. The length of the interviews with centre management and store owners/ management ranged between 45minutes and one hour. The length of rapid appraisal with patrons ranged between three-five minutes.

1.5.3 Data Analyses

The process of data analyses is to prepare the data whereby the objective is to convert raw data into information that is intelligible and meaningful. The data gathered from the semi-structured interviews and rapid appraisals were analysed by making use of content analyses.
Hsieh & Sarah (2005) state that content analysis is a research technique used to make replicable assertions and to validate inferences by the use of coding and interpreting communication artefacts such as texts and audio formats. The results of the analyses were used to determine what the motivating factors were in terms of patronage and spending patterns at the respective shopping centres. The results were gathered from various roles players such as centre management, store owners/ management and patrons. Ethical clearance was approved by the Humanities Research Ethics Committee (HREC) as a low-risk study. None of the shopping centres employee's, business representatives or patron's names was disclosed in the study. Alternatives such as pseudonyms were used when referencing the various representatives who participated in the study. All data collected during the research is stored on a password-protected computer. Upon request, a copy of the thesis will be available to all and any parties concerned.

1.6 CLASSIFICATION AND HIERARCHY OF SHOPPING CENTRES

Table 1.1 illustrates the shopping centre types in South Africa and the hierarchy which is based on size and function. Lower order facilities are classified as convenience or neighbourhood centres while higher-order facilities are classified at a regional level. A lower-order facility refers to a shopping centre that is visited frequently for daily consumption. A higher-order facility refers to a shopping centre that represents specialized and departmental stores (Prinsloo 2010a). According to their size band, Bayside and Tyger Valley shopping centres are both classified as regional centres.

Table 1.1 also indicates the association between the type of centre LSM group required to financially sustain a particular shopping centre. Furthermore, LSM denotes the asset wealth of households as measured by the ownership of a range of assets and amenities. The South African LSM ranges from LSM 1 representing the poorest of the poor to LSM 10 representing the richest of the rich. Research shows that LSM 1 to 4 are households living below the bread line, LSM 5 to 7 denote the emerging middle class while LSM 8 to 10 denotes the realised middle class (Van Aard 2005).

Table 1.1 Classification and hierarchy of shopping

Type of Centre	Size of centre (m^2)(GLA)	Trade area	Access Requirements	No. of households	Population	Socio-economic groups	Ave Radius (km)	Median Travel time (minutes)	Main tenants
CORE CLASSIFICATIONS									
Small free standing and convenience centre	500 – 5 000 5-25 stores	Serves part of a suburb	Suburban street	LSM 1-5, (<10 000) LSM 6-9, (<4 500) LSM 10-10+, (<2 000)	<40 000 <15 000 <7 000	All LSM groups	1 – 1.5	<3	• Café/Superette • few convenience stores
Neighbour-hood centre	±5 000-±12 000 25-50 stores	Centrally located for a group of suburbs	Major collector roads	LSM 1-5, (20 300-47 000) LSM 6-9, (9 000-20 100) LSM 10-10+, (3 700-8 600)	±135 000 ±51 000 ±18 500	All LSM 4-10	2	4-9	• supermarket • convenience • some small specialised stores
Community centre	±12 000-±25 000 50-100 stores	Strategically located to serve a suburban community	Major arterial road	LSM 1-5, (44 000-103 000) LSM 6-9, (20 000-46 000) LSM 10-10+, (8 000-19 000)	±295 000 ±115 500 ±41 000	All LSM 4-10	3	6-14	• large supermarket • convenience • small national clothing • restaurants & takeaways • services
Small regional/ Large community centre	±25 000-±50 000 75-150 stores	Specific sub region of city (can be large self contained community, i.e. Chatsworth)	Major suburban arterial road linking to a provincial highway	LSM 1-5, (90 000-209 000) LSM 6-9, (40 000-90 000) LSM 10-10+, (17 000-38 000)	±600 000 ±280 000 ±83 000	All LSM 4-10	5	10-16	• large supermarket • 1 or 2 large clothing anchors • Strong national tenant comparison goods component • boutiques • restaurants • entertainment • services
Regional centre	±50 000-±100 000 150-250 stores	Large region of city/or whole city/rural towns	Major arterial road usually a Provincial main road linking to a National road	LSM 1-5, (180 000-420 000) LSM 6-9, (80 000-185 000) LSM 10-10+, (33 000-76 000)	±1 200 000 ±464 000 ±165 000	All LSM 4-10	8	14-20	• large supermarket • (even 2) or hyper • 3 or more large clothing • small clothing stores and boutiques • entertainment, restaurants • services • convenience
Super regional centre	>100 000 >250 stores	Large region in city and surrounding areas/Tourists	Major arterial road usually a Provincial main road, linking to a National road	LSM 6-9, (106 000-250 000) LSM 10-10+, (44 000-101 000)	±623 000 ±217 500	Above average LSM 5-10	10+	24-30	• as at regional but more emphasis on entertainment and variety

Source: Prinsloo (2010b: 70)

CHAPTER 2: LITERATURE REVIEW

2.1 INTRODUCTION

The definition of a shopping centre is described by the International Council of Shopping Centres (ICSC) as an enclosed space that provides adequate lighting, climate control, a variety of stores, a parking lot and entrances at different locations (Chebat, Hassen & Ruiz 2004). The shopping centre revolutionized the retail format and is a ubiquitous feature of modernity in both the global north and global south (Howard & Stobart 2018).
The introduction of the shopping centre offered a new and exciting shopping experience to that of the downtown retail market. Upon nearing the completion of the first regional shopping centre in Edina, Minnesota a New York Times article was publicized stating a consumers' paradise near completion. The article detailed its features of which included seventy-two various stores, two sizable departmental stores and sufficient parking space (Longstreth, 2010; Spielvogel 1956). What gathered the most excitement and praise was the climate-controlled garden court that was three stories high and embellished with lush trees, colourful flowers, sculptures and fountains. Floor Space was rented to chain stores such as F.W. Woolworth, supermarkets as well as local traders. By the mid-1960s enclosed shopping centres became an industry standard and patrons no longer had to brave hot summers or snowy winters of the downtown retail markets (Jackson1996; Longstreth, 2010; Spielvogel, 1956).

Due to growth and change in the industry, the ICSC expanded the initial four basic shopping categories to eight principal shopping centre types (See Figure 1.5). Developments improved the quality and variety of the retail shopping environment. Consumers are now provided with a wide range of options when selecting their shopping destinations. These include the neighbourhood centre, community centre, regional centre, super-regional centre, speciality centre, power centre, theme/festival centre and the outlet centre (ICSC 1999). These developments resulted in changes that related to a shopping centres structure, layout, function, and how these establishments are experienced and perceived by patrons (Chebat *et al* 2005). Also, there have been advancements in shopping modes. Technological advancements have created various digital platforms where patrons are allowed to browse and purchase products. Patrons can make purchases from web stores using a desktop computer, a cellular mobile phone or gaming console and many other devices. These variations of shopping modes provide consumers with more options as to where and how they will make a purchase (Prinsloo 2010a).

From a marketing perspective shopping centres are closely associated with various brands. A brand must be managed to understand its target market as well as their behaviour and needs. Therefore a shopping centre should be well-positioned to give it a competitive advantage. Patronage is not always guaranteed and centre management has to provide on-going support and research to remain aware and relevant to consumer needs and preferences (North & Kotze 2004). A study conducted by Wakefield & Baker (1998) showed how the differentiation between shopping centres can influence patronage. Patrons are more likely to frequent a shopping centre that offers a wide variety of merchandise and services. As an example, a patron will trade off a smaller less attractive shopping centre for a shopping centre that offers a larger tenant mix, excellent services and a pleasant shopping environment. Trade-offs may occur between shopping centres that fall within the same catchment area or they may occur between different catchment areas. Other important factors that contribute to shopping centre patronage are locality and convenience. Shopping centres with an optimum location close to residential zones reduce non-monetary costs associated with patronage. Whereas convenience satisfies a patron who is pressed for time and seeks quick, easy and quality services (Chebat *et al* 2005). These efforts result in a more satisfied patron who would likely increase their spending time and patron frequency to a shopping centre (Wakefield & Baker 1998).

Both the historical and contemporary interpretations of the various retail formats such as the Arcades of Europe, shopping galleries and shopping centres vary widely (Howard & Stobart 2018). However it is agreed upon that these establishments have always been more about the economic activity; and regardless of geographical differences, their similarities in function and form provide an interchange between marketing, commercial enterprise as well as consumer and social preferences (Hardwick 2004; Srivastava 2015; Stobart 2008).

2.2 PERSPECTIVES ON THE DEVELOPMENTAL CHARACTERISTICS OF SHOPPING CENTRES IN THE DEVELOPED WORLD

This section looks at the development trajectory of the shopping centre in the developed world. The discussion starts with the USA and follows through to Britain, Europe and other developed nations such as Australia and Japan. It highlights what factors promoted shopping centre developments and competition from other retail formats.

The shopping centre is a symbol of the American contribution to the worlds consumer culture (Cloete & Skinner 2010). It is commended by millions who find an unmatched selection of gadgets, fashion and speciality merchandise in its climate-controlled setting. Shopping centres are unique and escapable urban features found in many parts of the world and became a de facto to downtown retail markets (Beyard *et al* 2006). The Country Club Plaza in Kansas City was the first fully planned shopping centre that emerged in the early 1920s (Cohen 1996). It was a multi-building complex that represented a type of village. It was only accessible by private vehicle and the parking spaces as well as the wide roads were indicative of the automobile orientation in retail construction (Howard & Stobart 2018). Other inter-war develops of a similar nature occurred in Los Angeles. It was centred on the emerging car culture and small strip shopping outlets that began to sprout on the outskirts of towns and cities. They were anchored by departmental stores, supermarkets and typically convenient stores that were orientated in a strip arrangement with a parking lot in front of store entrances. An example includes the Grandview Avenue shopping centre in Columbus, Ohio that consisted of 30 stores (Beyard 2006).

Before World War Two (WWII) shopping centre developments were limited. Department stores were expanding outside the traditional Central Business Districts (CBD) however these early suburban ramifications were stand-alone stores. It was only after the war that department stores gained traction by playing central roles as anchors, first in outdoor shopping centres and then in enclosed shopping centres (Longstreth 2010). Private ownership of the automobile played a major role in the development of new shopping centres in the United States and facilitated suburbanization and residential decentralization (Cohen 1996). Decentralized residential patterns were associated with the increasing mobility of the population. Subsequently, people became more reliant on their private vehicles to travel to work as well as to shop and do business in downtown districts (Howard & Stobart 2018). The demand for private car ownership was high and between 1946 and 1955 automobile sales had grown by four times (Cohen 2003; Nicolaide & Weise 2006; Tarver 1957). The phenomenon bolstered the suburbanisation retail market to expand and by the early 1960s, the number of shopping centres had reached 7100 (Cohen 1996; Howard 2015; Longstreth 2010). Reports published by the government described shopping centres as an imminent force that was a product of the automobile (*Impact of Suburban Shopping* 1960) Apart from the automobile, other key factors facilitated in the expansion of the shopping centre. Since the Great Depression, the geography of American retailing had been shaped by its federal government. Examples include the support to finance the suburban housing marking through programs that eased home financing which allowed more Americans to become homeowners (Howard & Stobart 2018).

Also, federal policies adopted after WWII continued to support the decentralization of cities. This led to the financing of highway infrastructure which promoted movement out of cities (Howard & Stobart 2018). By the early 1960s, many Americans owned homes, of which were in new developments that required various services that a shopping centre could provide (Hardwick 2004; Nicolaide & Weise 2006). The growing demand for shopping centre development was aided by tax policies such as the 1945 Internal Revenue Code that favoured new construction. The policy encouraged investors to depreciate their real-estate investments in a manner that favoured new construction over renovation and maintenance of existing properties (Howard & Stobart 2018).

The construction of a shopping centre required a high level of an initial investment with an extended payout time. Through accelerated depreciation, policymakers allowed investors a tax break large enough to overcome financial barriers. Moreover, the law promoted turn- over allowing investors repeated deductions with new properties (Howard & Stobart 2018). Shopping centre expansion was underpinned by this tax code and was regarded as a major contributor to decentralization, suburban homeownership, the automobile culture and growing racial tensions in cities (Hanchett 1996; Jackson 1996).

When the shopping centre started to appear in large numbers their function was regarded as unique and served as both commercial and social centres for new suburban communities (Hardwick 2004). Pioneering architects such as Victor Gruen designed them to provide Americans with a new kind of shopping experience. For instance one of his designs at Northland outside Detroit mimics a European city. It featured clusters of open spaces that were labelled with names of urban pathways and also included terraces, lanes and courts. They were decorated in a fanciful way with colonnades, sculptures and fountains (Cohen 2003; Hardwick 2004). The contemporary shopping centre featured non-commercial spaces such as community halls where meetings, dances and receptions were held. In many cases department stores anchored these developments. Supermarkets and department stores eliminated the need to visit the downtown grocery store or butcher. For instance, when the Bergen shopping centre and Garden State Plaza in New Jersey opened in 1957 they offered everything available downtown (Howard & Stobart 2018).These shopping centres offered more than a cluster of restaurants, department and speciality stores. The New Jersey Shopping centres offered extensive services such as laundromats, shop repair services, stock brokerage, banking as well as travel and real estate offices (Cohen 1996).

They also served as civic spaces, particularly for the suburbs. A catholic chapel and various recreational facilities were available such as an ice rink, movie theatre and bowling alley. The purpose of the wide range of services and facilities was to attract patrons that would increase foot traffic and drive sales volumes in the shopping centre (Cohen 1996). Typically built on inexpensive land and beyond the CBD, the shopping centre was designed and developed to function as an alternative to the heterogeneous downtown retail market and city streets (Hardwick 2004). They expanded outward than upward that left behind the verticality that downtown department stores developed out of prestige and necessity. The objectives of the early architects were to have the desired appeal of the traditional downtown centre without the aggravation of congested streets and limited parking (Hardwick 2004). By the mid-1960s the shopping centre was viewed as a solution to unplanned urban sprawl and the plight of cities. Furthermore, these views became widespread and Shopping centres such as North-Park that opened outside Dallas in 1965 were advertised as an attempt to fight the social ills of the city (Howard 2015). Many have contested the shopping centre, branding them as "tarmac machines for spending money", that is "entirely enclosed" and " paving a paradise to put up a parking lot" (Gosseye 2015: 213). Despite the criticism in the emerging neoliberal environment shopping centre development advanced unabated. By 1980 the United States was home to over 22 000 shopping centres and had more than doubled by the twenty-first century (Blaszczyk 2009).

The process of decentralisation took place in a racialized context in the United States. Suburbanisation and shopping centre development reflected the industry's' racism as well as the racially driven demographic transitions that took place in the post-war period. Unlike downtown retail markets, shopping centres and their department stores generally targeted the white middle-class market that moved to suburbs (Howard 2015). While African American consumers were being discovered by marketers during the early post-war period, shopping centres largely ignored this group. An example of an exception was the South Centre department store that opened in 1928 in Chicago. It was white-owned until the 1960s when it was bought by an African-American developer (Howard 2015).

The market for the Shopping centre in the United States has matured. Most shopping centres are decades old and are ageing rapidly. Ageing shopping centres are embedded in the urban context. Some Shopping centres are dominant in their trade areas while others have become obsolete. New construction is scant as large sites that are suitable for development are difficult to acquire and are met with opposition from public approvals (Beyard *et al* 2006). Traditionally the shopping centre was an American invention that was anchored into society by the commitment to private automobile ownership (Howard & Stobart 2018). It did not remain a uniquely American retail format which became evident over the second half of the twentieth century. By the 1960s and 1970s the idea of the shopping centre was exported to Europe and started appearing around Paris, the French Riveria, outside Vienna and in Zurich (Hardwick 2004).

As observed the key driver in shopping centre development in the United States was decentralization. Developers and department stores built markets on green fields and followed the trend of a moving population from urban cores to new housing developments in the suburbs. The shopping centre developed in the context of post WWII prosperity in the United States (Hardwick 2004). Many western and non-western nations welcomed the shopping centre however they were faced with different social, economic and political circumstances. An example that reflected such a circumstance was in post-WWII Britain. Shopping centre development occurred in conjunction with large redevelopment schemes. The purpose was to address wartime damage, provide housing and to reconstruct town centres (Morrison 2003; Stobart 2008).

The high street maintained a strong presence through a collection of department stores, chains, independents and cooperatives. Downtown remained the source to fulfil consumer needs and schemes for developing shopping districts or precincts emerged in the 1950s (Morrison 2003; Stobart 2008). An example includes the Chrisp street shopping precinct in Poplar, East London in 1951. Many retail formats of such kind took design cues from Lijnbaan in Rotterdam. It is a rebuilt pedestrian zone that was destroyed during wartime bombing (Morrison 2003; Stobart 2008).

The process continued and by the 1960s shopping precincts emerged in towns that had suffered little war damage. The first shopping centre to emerge was that of the Bull Ring in Birmingham in 1964. This was followed by a succession of others including the Arndale centres that were built on a sizeable scale and a modernistic style that appeared in many northern cities (Morrison 2003; Stobart 2008). The objective was not to compromise retail areas in town centres with out of town developments but to strengthen retail markets within these spaces (Guy 1994). Simultaneously out-of-town shopping centres were being developed in France. Examples include the Parly 2, Velizy 2 and Rosny 2 which are all in Ile-de-France. In contrast, the development of the shopping centre in Britain was much slower. This was a result of tight restrictions on planning regulations of which included greenbelt restrictions that limited various kinds of out-of-town developments (Howard & Stobart 2018). This was a common practice in European nations that enacted legislation and imposed planning restrictions to halt or slow the growth of out-of-town retail developments (Evers 2006).

Although out out-of-town shopping centre developments were curtailed examples do exist such as Breton Centre near Peterborough and Weston Favell near Northampton which was new town expansion schemes. An example of an early shopping centre development that represented the American model in size and location is the Brent Cross Shopping centre that was established in 1976 (Gosseye 2015; Morrison 2003). It adopted the dumb-bell style design, had two levels that consisted of two department stores and also featured many large chain stores, a supermarket as well as 3000 parking bays on a 52-acre site (Gosseye 2015; Morrison 2003). The 1980s and 1990s were characterised by an upsurge in shopping centre interest and development (BDP planning 1992). This was a result of two factors; the first reason was the growth in demand for major national retailers such as footwear, clothing, electronics and leisure. The second reason related to a change in the attitude of the government towards land-use-planning (Department of Environment 1977).

The Thatcher led government considered detailed planning regulations as a hindrance towards economic growth (Department of Environment 1977). Planning regulations were, therefore, relaxed an competition was encouraged. Subsequently, very large out-of-town shopping centres such as the Bluewater in Kent and Manchester's Trafford Centre were built which also resembled the American style regional shopping centre. Some shopping centre developments were context-based and varied across space and time. In Milton Keynes, new shopping centres served as a civic space and were designed with many non-commercial features and attractive landscapes similar to that of American designs (Gosseye 2015). It was a public-private partnership endeavour to cater to the interest of investors and to promote social and political goals. It occurred when neoliberalism was beginning to challenge the welfare state of Britain (Gosseye 2015).   Milton Keynes has therefore been dubbed as unusual as most of the shopping centres were built and financed by private developers (Gosseye 2015).

Similar to other developed nations the shopping centre in Australia was based on the United States model and has been a result of the construction and immigration boom as well as on private vehicle ownership. The first shopping centre was developed in Brisbane, Queens and later developments occurred in Sydney and Melbourne (Bailey 2005). The locations of the shopping centre were of no coincidence. Developers and retailers realised that it was economically viable to develop in suburban areas than for consumers to travel to the CBD (Bailey 2005).

The 1980s saw the emergence of competition from new retail formats. Outlet shopping centres such as Sawgrass Mills in Florida and Ontario Mills in California were established along high ways. They offered fashion labels at relatively low prices and attracted bargain hunters who travelled long distances to capitalise of these promotions (Farrell 2003). The retail format was also adopted in the United Kingdom. The first of its kind was built in 1993 by Clarks, a shoe manufacturer. The outlet shopping centre became widespread with some designed in a quasi-high street format that had many small stores often built-in anarchistic or vernacular styles (Morrison 2003).

Shopping centre developments in Japan boomed in the 1900s. Initial developments were relatively small with one anchor dominating the tenant mix however it has slowly developed into bigger retail spaces (Meyer-Ohle 2003). Also, shopping centres were established on greenfield sites located on the outskirts of the city. In recent years developers considered grey-field sites within urban centres as shopping centres assist in redeveloping the landscape of Japanese cities. Today shopping centres account for 21% of Japan's retail sales and 30% of retail space (Meyer-Ohle 2003). There is limited English literature on shopping centre development in Japan; however, the out-of-town outlet shopping centre arrived in the twenty-first century. The Gotemba Premium outlet shopping centres won an award for its publicity campaign that convinced Japanese patrons of the benefits of the new retail formats (Farrell 2003).Furthermore, the arrival of the power shopping centre was also a fierce contender for the traditional shopping centre. These shopping centres typically comprised of a Wal-Mart or Target and box stores that dominated one line of goods such as hardware, bedding or toys. They were also characterized by a turn towards discounts and specializations (Spector 2005). Also, they were designed around the automobile culture with stores sharing a parking lot. They differed from traditional shopping centres with pedestrian passageways between anchor stores and were car zones only. These developments saw popularity in Britain and across Europe, especially in countries with strong commitments to public transport (Spector 2005).

The shopping centre was once the largest retail format until it faced competition from a new retail format entry, the mega shopping centre. West Edmonton, the first of its kind opened in Alberta, Canada where climatic conditions were generally cold and indoor shopping centres and entertainment complexes provided leisure facilities in long winters. This was followed by the two million and five hundred thousand foot Mall of America outside Minneapolis, Minnesota in 1992 (Sherman 2008). It had multiple anchor stores and offered recreational facilities such as an aquarium, ice rink, roller coaster rides, a water-park, and movie theatres as well as a hotel and chapel. The mega shopping centre served as a tourist destination that attracted millions of visitors a year (Sherman 2008). Retail competition from newer formats and delivery channels are fierce as they erode sales from the tradition shopping centres. Entertainment, speciality and boutique, as well as lifestyle retailers, take away business at the high end. Big box, outlet and internet shopping take away business at the value-orientated low end (Beyard *et al* 2006). Not surprisingly, consumer interest in the ordinary in-door shopping centre has been declining since the mid-1990s. In America, older enclosed shopping centres have shut down, were converted to alternate uses, or demolished by the hundreds as they failed to appeal to consumers' aspirations and lifestyle (Spector 2005).

2.3 PERSPECTIVES ON THE DEVELOPMENTAL CHARACTERISTICS OF SHOPPING CENTRES IN THE DEVELOPING WORLD

This section discusses shopping centre developments in Asian countries such as India, China and Singapore. It also highlights shopping centre developments in African counties that include Nigeria, Egypt, Namibia, Zimbabwe and Mozambique. Shopping centre developments in the developed world are unique and context-based.

The traditional American shopping centre was on a decline in the twenty-first century however other regions of the world experienced a boom in development. As a result, India, Russia and Latin America have transformed their urban centres and retail industries (Abaza 2006; Davila 2012; Srivastava 2015). In Asian countries, shopping centres are developing rapidly. The retail industry in India is accelerating on an upward trajectory. Powerful and influential companies such as Tesco, Wal-Mart, Carrefour and Metro lobbied aggressively with the Indian government to allow 100 % Foreign Direct Investment (FDI) in the retail sector. Regardless if FDI is injected or not planned shopping centres are predicted to double (Gunguli & Kuruvilla 2008).

The retail boom has been a result of several factors. These include a rise in income levels, availability of brands and merchandise, a young population with a high disposable income, globalization, media proliferation and saturation in the international market. These changes are considered positive indicators of the Indian economy and major drivers for retail developments (MGI 2007). Shopping centre development has been a subset of retail growth in India. The shopping centres of Crossroads in Mumbai and Spencer Plaza in Chennai have pioneered these retail formats in a modernistic style. The lure of the shopping centre is in its mass appeal as it has something for everyone in the family (Gunguli & Kuruvilla 2008).

Generally, the shopping centre mirrors the state of society and acts as an agent of change. The youthful population of India coupled with rising incomes and a busier lifestyle has created a need for shopping centres particularly in affluent urban areas (Gunguli & Kuruvilla 2008). Various factors account for volumes of patronage in shopping centres however multiplex cinemas have been regarded as one of the most important motivators. This phenomenon has prompted Bollywood (Indian equivalent of Hollywood) to create a variety of cinematic content for the existing market. Also, shopping centres are viewed as a destination for fun and games that are clean, safe with a pleasant environment (Singh 2005). Although shopping centre development showed tremendous potential, some issues need to be addressed. As an example, high retail costs coupled with tax norms, restricting licensing, lack of single ownership, management and poor parking availability has led to dissatisfaction of shopping centre tenants. They feel they are subjected to high lease rentals and a high cost towards communal area maintenance (Business Line 2007).

Presently China's economy is growing rapidly and in terms of the size of the shopping centre, America is no longer in the lead. The first shopping centre was established in 1990 and many mega shopping centres have been developed at the turn of the twenty-first century. A number of the largest shopping centres reflect the nations' strong emerging middle class and the new consumer economy (Campanella 2008). An example of one of the world's largest shopping centre is the Golden Resource shopping centre which opened in 2004. It covered six million feet and other larger Chinese mega shopping centres have arrived steadily on the scene (Campanella 2008). These establishments include office buildings, apartments, windmills and theme parks (Van Riper 2008).

Spatial constraints have been a major factor why shopping centres tend to be six stories and sometimes higher. The reason why China can build large shopping centres is related to the low cost of land and inexpensive labour costs. Moreover, car ownership has stimulated a demand for shopping centre development. Subsequently, it has also attracted investments from large retail companies from other nations (Styan 2010). A major concern is that the population is not accustomed to these new shopping interventions. Furthermore, the demand for large shopping centres outweighs supply and the question of whether these shopping centres are sustainable is a major concern (Van Riper 2008). After the shopping centre boom in China, a large portion of retail space remains unrented. Over-storing and the popularity of e-commerce have forecasted many shopping centres to close down (Linder 2016; Minter 2016).

Similarly, shopping centres in Singapore are multiple stories high with some of these structures extending underground (Cloete & Skinner 2010). Shopping centres in this part of the world are regarded as some of the worlds largest. Development in the country is increasingly driven by strong, independent shopping centre developers. They differentiate their shopping centres and experiment with concepts where anchor tenants play a lesser role. Yap (1996) described general trends in retail that incorporated bold designs, great specialization, and significant control of developers over space and more entertainment-based offerings. Southeast Asian shopping centres in Kuala Lumpur and Jakarta, for example, has glass elevators and elaborate facades that serve as a new model for shopping centre development in other countries like Egypt (Abaza 2006).

Nigeria has also begun to experience an increase in the development of the shopping centre. There are unprecedented growth and transformation in the retailing domain and retail environment. Since the development of the first shopping centre named Palms Shopping centre emerged in Lagos in 2003, several others have developed whilst others are still in construction (Idoko, Ukenna & Obeta 2019). Traditional market spaces were highly popular amongst Nigerians however the introduction of the shopping centre has offered a new shopping experience (Idoko *et al* 2017). The swelling youth and growing middle-class account for the interest in the formally untapped global retail business. Moreover, the deepening democratization of processes and institutions provided an attractive opportunity for huge investments in shopping centre developments (Nigeria Population Commission 2006; Al-Mahy 2013).

Shopping centre development in other African countries is relatively immature and less explored. As an example, Namibia only has twenty two shopping centre establishments with recent additions being The Grove in Windhoek and The Mall of Namibia (Hedley 2013). Botswana only has 12 shopping centres while Mozambique only has three. Furthermore, the shopping centre development in Zimbabwe is also relatively low (SA Commercial property 2012). The shopping centre industry in some developing nations has suffered from processes such as recession, currency devaluation and overbuilding. The vast income disparity was a major contributing factor in countries like Egypt, where only a minority could afford to shop at new up-scaled shopping centres.

Like the United States, Egypt has experienced the dead shopping centre phenomenon. It is a process that is characterized by low patronage, a high vacancy rate and physical deterioration. The concerning question is whether the shopping centre can withstand these pressures or whether it will decline as a global trend (Abaza 2006). A common practice observed in countries such as Egypt, Turkey and India are patrons who visit a shopping centre even if they do not consume or purchase any products. For instance, young Egyptians who live in slums view shopping centres as clean spaces where they can participate in a better world. The imitation through dress and their presence in a shopping centre evoke feelings of forming part of a higher society (Abaza 2006).

Scholarly interpretations have hinged on the idea that the shopping centre provides privatized public spaces in which there is potential for social, cultural and political expression (Gosseye 2015). The shopping centre is argued to reproduce social inequality through means of policing and excluding those who might not be easily kept at bay on public streets (Davila 2012). Shopping centre development occurred in Puerto Rico during 1993 and by 2008 317 shopping centres were in operation. The new retail format was not accepted uncritically and led to concern that the islands retail sector was subjected to “Walmartization” (Davila 2012: 44). Shopping centres are not always used for the purpose which they are developed for on the Island. The elderly use them as a place to socialize while external vendors use their open space to sell their products. Students have also overtaken a major shopping centre, Plaza Las Americas, to protest university tuition fees. Shopping centres are therefore not necessarily apolitical spaces that were constructed for leisure or entertainment (Davila 2012).

2.4 THE SOUTH AFRICAN PERSPECTIVE

This section looks at the development of the shopping centre in South Africa. It also highlights the emergence of the new consumer market and its potential to transform the retail and shopping centre industry. Furthermore, it also examines the challenges of shopping centre developments in South Africa.

Shopping centre development in South Africa has followed similar trajectories found in other regions of the world. The retail landscape for many towns was made of up of scant shops that provided basic products and services to consumers. The retail environment was also extended to farming markets where farmers traded goods and travelling salesman ventured into rural areas (Cloete & Skinner 2010). The onset of the discovery of diamonds as well as the discovery of gold led to huge infrastructure developments. The transport network vastly improved as new roads and railways were built to support an emerging economy. Roads were linked to mining towns and the trading of goods and services rapidly increased. Trading evolved and set the foundation for the retail industry in South Africa (Cloete & Skinner 2010). The first retail development was noted to be in Gauteng province where a small retail strip was constructed with off-street parking bays. Shopping centre development in South Africa was strongly influenced by the American shopping centre model. Out of town developments and private vehicle ownership were the main reasons for adopting this retail format (Cloete & Skinner 2010).

A steady increase in economic growth together with steady car ownership in the 1960s and 1970s created the ideal conditions for the development of the shopping centre. The first shopping centre was developed in a suburb called Southdale that is located in the south of Johannesburg. The doors were opened in 1961 and it became the first suburban shopping centre (Cloete & Skinner 2010).

There are disputes regarding the first enclosed shopping centre. The Randpark centre that was established in 1971 and claims to be the first shopping centre. However, Hyde Park Corner often disputes the claim as it proclaims to be the first enclosed establishment (Cloete & Skinner 2010).

Consumers were introduced to a new shopping environment and were reluctant to change their style of shopping. Their attitudes soon changed when they realised the benefits of the shopping centre such as a climate-controlled environment with a variety of stores and merchandise to choose from, all under one roof (Cloete & Skinner 2010). Furthermore, a large regional shopping centre was developed in Sandton city, Sandton. It was established in 1973 and accelerated the economic growth of the region. The outskirts of Sandton transformed from a farming community into a vibrant business hub. The second phase of the development during 1984 broadened operations and expanded by introducing hotels and office spaces. The shopping centre hosts some of the leading fashion brands and outlets both locally and internationally (Sandton city n.d.).

To date, the retail sector represents almost 15% of the total Gross Domestic Product of the South African economy. Approximately one million South Africans are employed in a large number of stores throughout the country. The cumulative sales from retail facilities are close to R900 million (Prinsloo 2016). Furthermore, it is one of the only countries where planned and unplanned shopping centre development is at the same level (Prinsloo 2010a). There are approximately 2 000 shopping centres in South Africa that range between 1000 m^2 and more than 170 000 m^2. Also, these centres represent approximately 23 million m^2 of the 37 million m^2 of all the retail facilities. According to the ICSC's 2015 country fact sheet, South Africa had the 5th highest number of shopping centres in the world. This positioned the country above developed nations such as the UK, Germany, France and Australia (Prinsloo 2016).

Shopping centre developments are widespread in South Africa and form part of the urban fabric of many the nations' nine provinces. One example is in the Western Cape Province that houses the picturesque and iconic Victoria and Alfred Waterfront (V&A) shopping centre. It offers a wide selection of restaurants, stores and recreational activities such as boat rides and an amphitheatre where live performances are enjoyed. It also houses Canal Walk Shopping centres with its Cape Venetian architectural style which is the third-largest shopping centre in South Africa (Prinsloo 2010a). Another example is the Gateway Theatre of Shopping in Umhlanga. It is one of the biggest establishments of its kind. It provides a variety of entertainment to shoppers such as 18 movie theatres, a wave park, skating park, indoor rock climbing as well as an ice rink. The coastline of the Kwazulu

Natal is an ideal destination for tourists. Many Shopping centres have been developed in coastal and rural areas such as Nquthu and Nongoma (Prinsloo 2010b).

The initial phase of rapid expansions of shopping centres occurred between 1985 and 1994. This period witnessed an expansion of retail space that amounted to approximately two million and four hundred thousand m². The second phase of rapid development occurred between 2000 and 2005 of which approximately one million and four hundred thousand m² of retail space was established. Growth in shopping centre development over the last 10 years is due to a high economic growth rate and an improved socio-economic profile of the population (Prinsloo 2010a).The end of apartheid and the introduction of a democratic South Africa in 1994 led to the development of a series of social, political and economic transformations. The newly elected ANC government's development and reconstruction programme resulted in the reconfiguration of the country's industrial and service sectors. The retail sector was of no exception as for many retailers the post-apartheid period was characterized as a time of operation and fundamental strategic change (Rogerson & Rogerson 1997).

A major change was the emergence of a new black middle class. A Unilever Institute of Strategic Marketing study termed the phrase black diamond to describe the new consumer segment (Olivier 2007). The segment was comprised of well educated and employed individuals with upward mobility. Even though they were relatively a small group of approximately two million consumers they represented about US$20 billion - US$25billion in spending power (Olivier 2007). They posed as the greatest opportunity for marketers in South Africa however they were underserved in terms of retail provision (Hugo-Burrows 2004). The emergence of the black diamond formed part of a broader socio-economic trend. The Human Resource Council (2007) indicated a growth of the South African middle-class from 1994 to 2000. Table 2.1 shows the racial group dynamics of South Africa from 1998 to 2003. It illustrates significant improvements in the living standards with particular respect to the African (black) group.

Table 2.1 LSM of racial groups between 1998-2008

	Africans	Asians	Coloureds	Whites
		1998		
LSM 8–10[1)]	2.8	57.2	30.1	87.2
LSM 5–7	52.5	42.5	60.4	12.8
LSM 1–4	44.7	0.3	9.5	0.0
Total	**100.0**	**100.0**	**100.0**	**100.0**
		2003		
LSM 8–10	5.6	57.3	32.1	87.1
LSM 5–7	60.5	42.6	59.6	12.9
LSM 1–4	33.9	0.1	8.3	0.0
Total	**100.0**	**100.0**	**100.0**	**100.0**
		2008		
LSM 8–10	10.5	55.4	32.6	86.0
LSM 5–7	65.2	44.5	59.5	14.0
LSM 1–4	24.3	0.1	7.9	0.0
Total	**100.0**	**100.0**	**100.0**	**100.0**

Source: Van Aard (2005: s.p.)

The improved affluence of the different segments of the population led to consumers that attached priority to the purchase of branded products (Prinsloo 2006). During the apartheid period, various international brands were still available however the political and commercial isolation of the country meant a wide variety of international products remained unavailable (Irwin 2003). Furthermore, the period was also characterized by limited brand strategies for the majority of the black population. Since the introduction of the new political dispensation of 1994, the situation has radically altered and the country was able to focus on previously absent international brands such as The Body Shop, Mc Donald’s, Kodak and Jeep (Irwin 2003).

Brand consciousness has also been strengthened by the frequency in which individuals travelled. Many countries were off-limits for travel purposes however, after 1994 they have opened their borders to South African tourists. The outcome has resulted in a better travelled, more conscious consumer who is aware of assorted global brands and products (Burgess 2003). For those who have not travelled the upward materialism that accompanied the middle-income group has exposed consumers to an array of communication media (Burgess 2003). The exposure to global brands through magazines, television and the internet has increased brand awareness and partly explains the behavioural changes amongst South African consumers. Consumers now expect retailers to stock merchandise that is desired rather than to purchase what is available (Burgess 2003).

Moreover, brand consciousness has strongly been accompanied by the social consciousness that mirrors the transformations that occurred in post-apartheid South Africa (Irwin 2003). Consumers place high importance on values such as social justice, citizenship and equity that had prompted many organisations and retailers to demonstrate their involvement in the country's' transformation. This has subsequently led to many brand management strategies that are integrated with corporate social initiatives (Irwin 2003). National retailers also had access to millions of consumers and as a consequence, many individuals migrated from traditional, privately owned stores and sought alternative offers provided by the multiple (Prinsloo 2006). The increase in spending coupled with the saturation of traditional markets enabled national retailers especially supermarket chains to focus on the market expansion. The increase of formal retailers into the un-tapped lower and middle-income markets has resulted in the interest of shopping centre development in townships (Tagg 2006; Tustin & Strydom 2006).

Shopping centre development in townships was perceived by the national and provincial government as important initiatives to empower disadvantage communities through urban and economic generation (Nel & Binns 2002). The lack of retail infrastructure in townships had negative effects on low-income households and was associated with expenditure dynamics that were a norm until the introduction of the shopping centre (Tustin & Strydom 2006). These norms included low car ownership and an undeveloped transport system that resulted in people walking or taking a mini-bus taxi for shopping purposes. Township residents often travelled by taxi to urban retail outlets than townships stores. Township retailers were classified as survivalists who supported their families and were not able to fully satisfy their consumer base (Tustin & Strydom 2006).

The historical dynamics of the township retail environment together with an increase in the black middle-class income group promoted an environment for retail development. The movement of large grocery chains into untapped markets resulted in a substantial increase in shopping centre development in these areas. They provide a wide variety of food, grocery products and services that were previously not offered in townships (Tustin & Strydom 2006). To date, shopping centre development in townships and rural areas have increased in both number and size. The average size of shopping centres in terms of floor space in these areas increased from 6500m2 GLA before 1994 to 65000m2 GLA post-1994. The growth in retail centres appears to reflect that consumer markets grow along with economic development in township areas (Urban LandMark 2011).

2.5 RETAIL STRATEGY

Shopping centre development has broadened and introduced consumers that were previously not catered for and resulted in new challenges for centre management. Retailers must adapt and take action to stay relevant in the fast-changing landscape of retailing; therefore retailers must develop a careful retail strategy (Berman & Evans 2003). The retail strategy is referred to as a holistic marketing plan in which a retail company combines resources to achieve its marketing goal. The strategy enables a retailer to promote its good and services as well as to target the respective consumer. The primary outcome is to increase sales and consumer satisfaction. An effective retail strategy should be goal, value and patron orientated (Berman & Evans 2013).A retailer should implement a retail strategy by developing a retail marketing mix to satisfy consumer needs. This will set apart a retailer from its competitors and potentially influence a consumers' purchasing decisions (Levy & Weitz 2013). In general terms, the retail strategy is dependent on various factors. Figure 2.1 highlights the elements that are included in a retail marketing mix to achieve the optimum retail strategy. These are promotion, merchandise, pricing, patron service, personal selling, store layout, design and location. Marketers need to understand these factors and the role they play to make a shopping centre a first destination choice for both commercial and social activities (Lusch, Dunne & Carver 2011). Furthermore, retailers should make strategic decisions about the retail marketing mix. For example, the primary objective should be to add value to the goods and services that are sold.

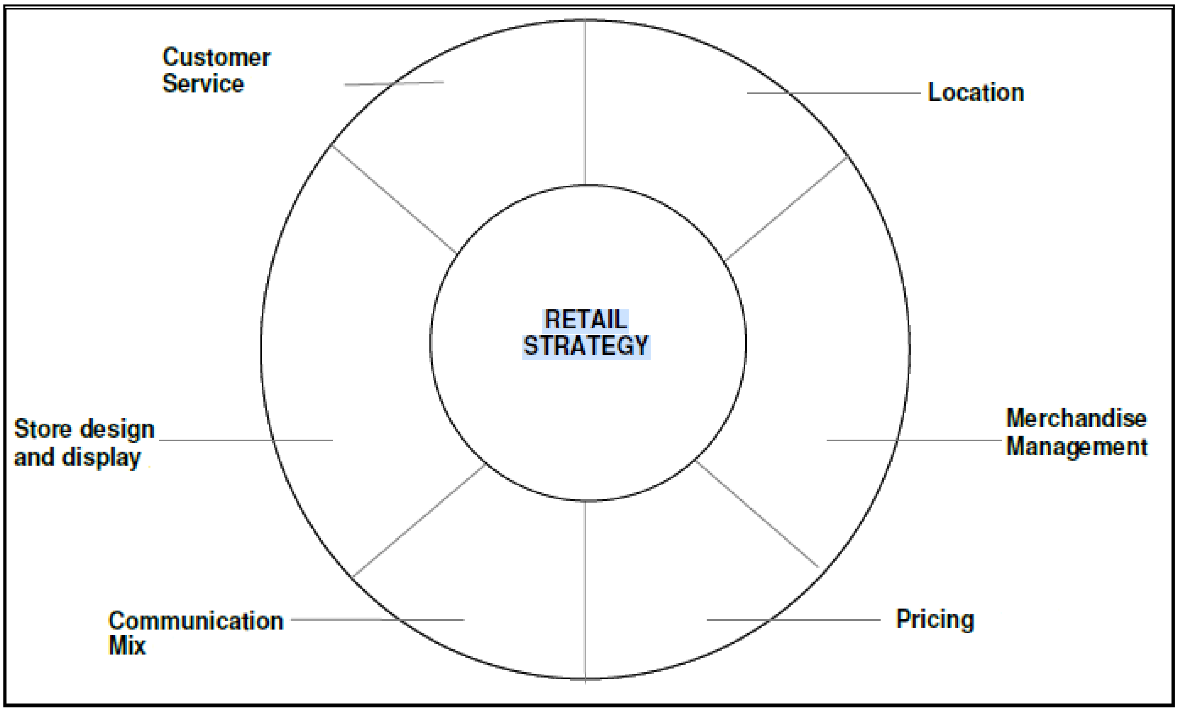

Figure 2.1 Elements of a retail strategy Source: Levy & Weitz (2013:20)

Table 2.2 describes the elements that are found in the retail marketing mix as well as their placement within the broader retail strategy. These elements will be discussed later in the chapter (Sullivan & Adcock 2002).

Table 2.2 Components of a retail marketing mix

COMPONENTS	**DESCRIPTIONS**
Location	Physical or virtual placement of outlets
Image/Reputation	Managing and encouraging demand (traffic/shopper visits)
Store design/ Environment	Interior and Exterior Design (layout, display, atmospherics)
Range / Assortment	Mix of items offered for sale
Pricing	"Shelf prices" relative to competitors
Promotion	Store-based – market-based competition
Patron service	During and post-sale
Relationship management	Building loyalty and positive shopper perceptions

Source: Sullivan & Adcock (2002: 20)

The purpose of a retail strategy is to influence the overall image of a retail store or shopping centre. Moreover, the concept of a retail image applies to a shopping centre where various retail stores are located. Overall attractiveness can improve patronage and therefore the following section looks at the shopping centre image and the marketing thereof (Wong et al 2001).

2.6 RETAIL IMAGE

There is no universal or consensual agreed-upon definition of a retail image and its dimensions. It is complex and therefore many scholarly publications can be cited. The definition of a retail image in this thesis is defined as a store or shopping centre's personality. It is a mental process in how a consumer interprets and perceives a retailer or shopping centre. It is part psychological qualities and part functional qualities (Martineau 1958). The functional qualities refer to the layout, location, price value relation and services that a patron can objectively compare with other retail stores and shopping centres. On the other hand physiological attributes represents the luxurious and attractiveness that are regarded as special attributes of a store or shopping centre (Martineau 1958).

The retail image focus on the attributes that contribute to the type of images a shopping centre evokes in the mind of a consumer. It encompasses the totality of a shopping centre and is not solely reliant on individual stores. The additional consideration could include safety, parking, layout, atmospherics, and luxury (Martineau1958). Shopper centre image is regarded as one of the draw-cards for potential consumers. A consumer will consider a centre with a specific image and personality within which he or she feels comfortable. This notion is supported by Levy and Weitz (2013), who argued that a retailer or shopping centre can position a brand image to influence a consumer and to build on this image to obtain a competitive advantage.According to Berman and Evans (2013), a retailer should use a strategy to portray and communicate the retail image to consumers and competitors. The process of creating and maintaining a good retail image is ongoing and it should be used for differential purposes. The design and environment of a retail outlet or shopping centre should evoke a positive mood, image or mindset and should entice repurchasing and frequent patronage by a consumer. Furthermore, Berman and Evans (2013) further argue that this image would dictate the perception that a consumer has of the retail outlet or shopping centre and that it must be distinctive, clear and consistent. Baker (in D'Astous 2000) divided the physical shopping environment into three distinct components. The first deals with the ambient factors which look at the background aspects and may or may not be consciously perceived by a consumer, however they affect the senses.The second element is the design factors which are directly perceptible by a consumer. The third element comprises of social factors that are directly related to the people in the shopping environment. Table 2.3 provides a description and summary of these components.

Table 2.3 Elements of a shopping environment

CATEGORY	DEFINITION	FEATURES
Ambient factors	Background conditions that exist below the level of our immediate awareness	Air quality: temperature, humidity, circulation/ventilation Noise: level and pitch Scent Cleanliness
Design factors	Stimuli that exist at the forefront of our awareness	Aesthetic: architecture, colour, scale, materials, texture, pattern, accessories Functional: layout, comfort, signage
Social factors	People in the environment	Other customers: number, appearances, behaviour. Service personnel: number, appearance, behaviour

Source: Baker (in D' Astrous 2000: 150)

The retail image consists of various elements which form the foundation of the overall image. These elements should not be considered in isolation but should complement each other. Figure 2.2 shows the different elements that make up the retail image. Retailers and shopping centre management should use the combined elements in such a way to attracts consumers (Berman & Evans 2013).

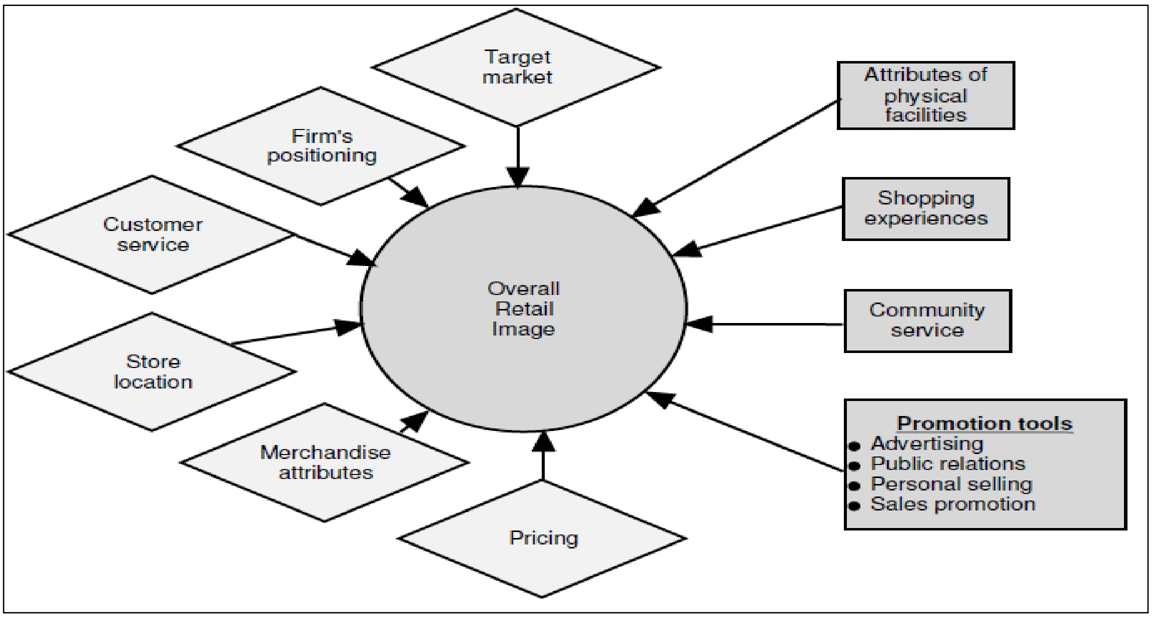

Figure 2.2 Elements of a retail image Source: Berman and Evans (2013: 488)

These combined factors provide the synergy to influence the overall image. These elements are discussed in section 2.8 i.e. location and merchandise attributes and shopping experience. Retailers and shopping centres need to use these elements in such combination as to entertain consumers to lure them from their busy schedules. Disney and GAP are excellent examples of retailers that use elements of the retail image to provide good experiences and entertainment to customers. It is therefore important that shopping centres with multiple stores maintain a consistent image across the range of outlets (Berman & Evans 2003).

2.7 CONSUMER BEHAVIOUR

The benefit to marketers and retailers of understanding consumer behaviour is two-fold. It assists in both developing and implementing effective marketing strategies. Secondly, it provides insight into consumer behaviour that allows marketers and researchers to satisfy a consumer's needs (Dhurup 2008). Shopping centres act as ideal environments where consumer behaviour can be studied, tested as well as a space to identify consumer preferences and needs (Web 2010). Furthermore, it has been highlighted that retailers should seek to identify motives to shops which will further assist in making sound marketing decisions (Dhurup 2008).The decision-making process becomes a challenge when a consumer has a wide assortment of products to choose from. This challenging environment together with market competition should signal researchers and marketers to understand consumer behaviour (Lawrence 2012). Understanding consumer behaviour is a challenging and ongoing process as it is not organised, simple or automated. Therefore marketers and related parties should award sufficient time and energy to better understand consumer behaviour (Hawkins & Mothersbaugh 2013). To conceptualise consumer behaviour and provide a discussion regarding the motivations for shopping centre patronage, consumer behaviour should be defined and the process of consumer behaviour model should be described.

2.7.1 Defining consumer behaviour

Various definitions of consumer behaviour exist and no universally accepted definition has been adopted. For this thesis, the definition of Hawkins (*et al* 2007: 283) definition has been adopted. It is defined as "the study of individuals, groups, organisations and the processes they use to select, secure, use and dispose of products, services, experiences, or ideas to satisfy needs, and the impact that these processes have on the consumer and society."

This definition is all-compassing and involves an aspect of social responsibility. The influence of consumer behaviour in a societal context is relevant in the marketing environment. For instance, aggressive marketing campaigns on gaining effortless credit as well as aggressive marketing on unhealthy fast foods have negative implications on the economy as well as on national health (Brytenbach 2014). The definition also aligns with the consumer behaviour model that will be discussed in the following section.

2.7.2 The consumer decision-making model

Models of consumer behaviour have been developed since the 1960s with the purpose to describe and organise the purchasing process that will facilitate market research and the broader application of consumer behaviour. It also assists in the understanding of the behaviour of both buyers and consumers (Brytenbach 2014). A model identifies and provides reasoning to the underlying relationships between the elements inherent in a model. It could therefore be understood as a map of reality that will be tested to describe, predict and explain consumer behaviour and associated influences (Engel & Blackwell 1982).
The model developed by Hawkins and Mothersbaugh (2013) as shown in Figure 2.3, does not identify specific consumer behaviour; rather it focuses on the general beliefs and general nature of consumer behaviour. The base of the model is focused on how consumers view themselves (self-concept) that results in the desired lifestyle and is dependent on available resources. It serves as a major source of influence that can assist marketing managers when developing marketing strategies (Brytenbach 2014). Moreover, the aspects of influence are explained as follows. The internal influences of the model focus on the physical and psychological aspects of a consumer. These influences assist the consumer in developing a sense of self-concept and lifestyle motivations. Subsequently, it produces the desires and needs of a consumer that in turn results in the selection and consumption of appropriate products (Brytenbach 2014). The external factors that influence the way a consumer experience and acquire services and products are linked to the immediate environment. These include demographics, family, reference groups, social status, marketing activities and culture (Brytenbach 2014).

When consumers are placed in a relevant situation such as purchasing a product, the consumer decision-making process is stimulated. The steps in the consumer decision-making process are as follows. Step one – problem identification. The consumer identifies a specific need and aims to satisfy the need. Step two – searching for information. In this phase, the consumer actively and subconsciously searches for information that will lead to a solution to the problem. Step three involves weighing the possible solution and alternatives against each other. In this phase, a selection is made of the best available option. Step four – includes the option selection and as well as outlet selection, which is where the place of purchase usually occurs (Brytenbach 2014).

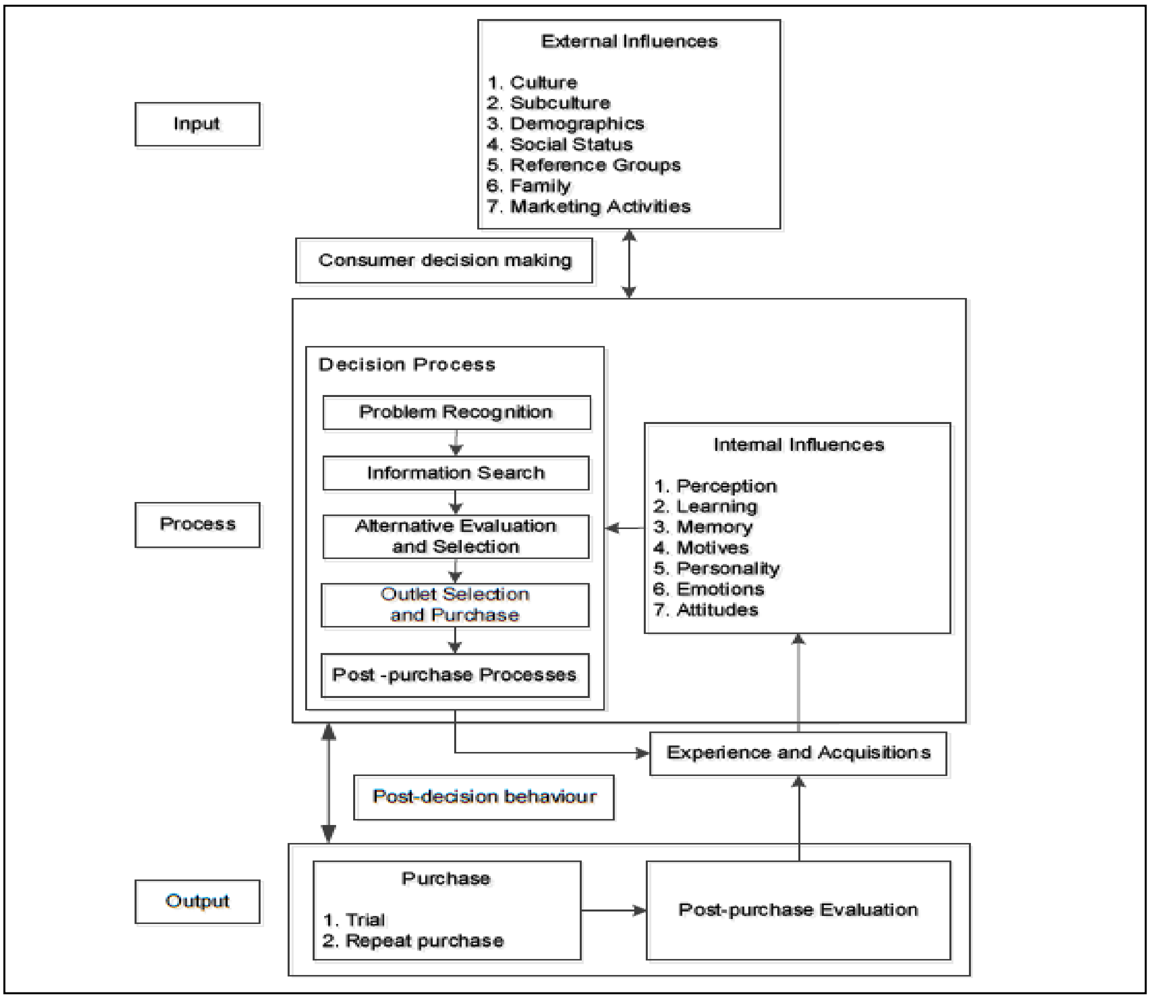

Figure 2.3 A simplified model of consumer behaviour Source: Schiffman *et al* 2013 (2013: 36**)**

The decision-making process results in the accumulation and experiences of products and services. This in turn connects the consumer to the internal and external influences that influence self-concept, identity and lifestyle. The decision to select the most favourable product, retail store or shopping centre destination is determined solely by a consumer. It is therefore important that marketers understand the underlying thought process of the consumer that influence their motivations and preferences. Consumer behaviour is dynamic and requires extensive research (Brytenbach 2014).

2.8 MOTIVATION FOR SHOPPING CENTRE PATRONAGE

The literature highlights that the shopping centre offers a rich shopping experience through its safe, climate-controlled environment and the assortment of stores found in it. Other important aspects that improve shopping centre patronage are strong brand positioning, a positive retail image and marketers who understand consumer needs and behaviour. This section looks at several elements that motivate shopping centre patronage. It includes aesthetics, social interactions, merchandise and tenant mix, entertainment, available facilities and convenience.

2.8.1 Aesthetics

Shopping centre aesthetics which is also referred to as atmospherics is defined as the direct shopping environment which is experienced by a patron. A patron can either perceive the shopping centre as uninteresting, depressing or it could be perceived as cheerful or attractive (Ahmed *et al* 2007). Aesthetics relate to the stimuli in the background of the shopping centre which a patron is not always aware of. This includes lighting, background music, colour schemes, decor as well as air conditioning (Wakefield & Baker 1998; D'Astous 2000; Berman & Evans 2013). An example of good atmospherics is the Canal Walk shopping centre in Cape Town. It incorporates Cape Venetian architecture in its design application, background music and the use of various lighting applications (Architecture & Builder 2000). Atmospheric features are most likely to have a positive influence on a patrons' shopping behaviour and experience. A shopping centre with excellent atmospherics will motivate a patron to dwell for longer a period, increase spend and patron frequency to a shopping centre (El Hedhli *et al* 2013).

2.8.2 Merchandise and Tenant Mix

The tenant mix is described as the allotment of stores found in a shopping centre as well as store size, price points, placements of stores and the mutual relationships between them. Merchandise refers to the products that are bought or sold. It also refers to the quality, selection, depth, style and price of the products (Snyders & Cloete 2010) The purpose of selecting a good tenant mix would be advantageous to shopping centre management, the tenants as well as patrons. Furthermore, a greater tenant and merchandise mix provide a wide range of products and services to patrons. Patrons continuously seek innovative as well as new and improved products (Snyders & Cloete 2010). The first step to satisfy consumers' needs involves researching information about products. This can only be explored by what is currently available on the market (Ahmed 2007; Kaufman & Lane 1996). Also, consumers are attracted to shopping centres as it provides a space where they can see, feel, examine and learn about new products. A good tenant mix, therefore, provides the consumer with a wide variety of options and encourage browsing of items and to generally learn about products available on the market (Tauber 1972).

2.8.3 Social Interactions

Shopping centres are regarded as social spaces and are associated with social benefits. It allows consumers to interact with peers, friends and with others who express hobbies and interests of a similar nature (Tauber 1995; Green 2001). Also, some patrons find joy in people watching, meeting new people while at the same time to shop and form part of a crowd (Karande & Merchant 2012). Furthermore, shopping centres are ideal places for leisurely activities. They offer a range of recreational amenities that include restaurants, arcade arenas, movie theatres and public open spaces. Moreover, entrance to a shopping centre is free and allows low cost and effective entertainment facilities to families (Ahmed *et al* 2007). Shopping centre management should therefore understand the importance of entertainment amenities as it extends patrons visiting time in a shopping centre (Zhaung *et al* 2005).

2.8.4 Entertainment

Patrons are more likely to visit a shopping centre that offers a form of entertainment in the tenant mix (Wakefield & Baker 1998; Sit et al 2003). Shopping centres are evolving from passive places where shopping is primarily done to destinations for entertainment and events. Including entertainment to the retail tenant mix is also known as retail-tainment.

To achieve the entertainment aspect shopping centres should include quality public spaces, places where people can socialize, relax and have fun. These offerings include movie theatres, restaurants, as well as indoor and outdoor spaces (Prinsloo 2010a). Furthermore, entertainment within a shopping centre is a strategy to make it a first selection destination for a consumer. In the case of South Africa, shopping centres are orientated on the element of entertainment. The aim is to attract a broad base of patrons and to establish long term relationships with them (Barnes 2002). Also, patrons perceive a shopping centre as fun and exciting that can serve as a means for them to escape their problems and to alleviate stress (Tauber 1995). It also offers patrons a form of recreation when they are feeling bored. Shopping centres have strategically high sensory environments that allow patrons to see, touch and try on different merchandise such as clothing and jewellery. Patrons senses are also stimulated when walking past restaurants that scent the air with different types of food as wells as simply observing other people (Anning – Dorson *et al* 2013).

2.8.5 Available Facilities

The physical environment of the shopping centre influences the first impression of a patron. It also allows a patron to form perceptions of their future shopping experiences and how often they will frequent a particular shopping centre (Wakefield & Baker 1998). The attributes influencing consumer behaviour include the architectural elements, decor and design. These features are used by developers to dramatically enhance a shopping centres interior and to satisfy patrons seeking sensory stimulation (Ahmed *et al* 2007). Also, layout, as well as signage, plays an important role especially to patrons visiting from different geographical areas. The layout refers to a stores flow, ambience as well as the placement of merchandise that can easily influence consumer behaviour. Furthermore, signage allows patrons to find stores as well as their favourite brands. It also allows patrons to navigate a shopping centre such as finding the toilets, banks and even to exit the parking area (Teller & Elms 2010). Layout and signage are important attributes that improve the convenience of a shopping centre. It can thus advance the overall attractiveness of a shopping centre and elevate the shopping experience of a patron (Teller & Elms 2010). Moreover, an equally important factor in shopping centre design is layout and parking. The elements of parking include the type of parking facilities and the availability of parking. Parking is regarded as the initial start of the shopping experience and can either create a positive or negative perception of a shopping centre (Teller & Elms 2010). Furthermore, security is a major factor that can affect the overall attractiveness of a shopping centre and influence consumer frequency. Anyone has access to a shopping centre and these spaces are usually crowded and have been subjected to incidents such as theft, robberies and even terrorism. Effective and visible security provides a secure and controlled environment that contributes to a positive retail image (Ahmed *et al* 2007).

2.8.6 Convenience

Convenience in terms of the design of a shopping centre is highly important to satisfy a patrons' sophisticated preferences and needs (D' Astous 2000). It is related to the value that a consumer would derive from a shopping centre and relates to a reduced expenditure of time, energy and money (Kim 2002). Location and parking are important and can influence convenience. Shopping centres should be conveniently located. For instance, it should be close to public transport infrastructure and possibly within a retail belt. In the South African context, location is important as a large per cent of the population is reliant on public transport (Wong *et al* 2001). Market research and the processes of town planning influence the locations of shopping centres. There are positive aspects to selecting the location of a shopping centre. It allows ready access and attracts a large number of patrons as well as to ensure a potential increase in sales. Location is considered as one of the crucial factors and a slight error in judgement can result in a substantial economic loss (Prinsloo 2010a).

CHAPTER3: RESULTS AND DISCUSSION

3.1 INTRODUCTION

This first section of the chapter discusses the results that were gathered from participating centre management as well as store owners/managers. Each sub-section first discusses centre managements feedback and then follows with perspectives of store owners/management. The Second section discusses shopping centre patrons and spending patterns from a patrons perspective.

3.2 FACTORS ATTRACTING SHOPPING CENTRE PATRONAGE

Centre Management at Bayside and Tyger Valley shopping centres stated various aspects attracted patronage such as location, tenant mix as well as the layout of the complex. Tyger Valley shopping centre is located off Durban road and close to the N1 highway. It is linked to public transport infrastructure that included the Golden Arrow bus and minibus taxi services. These services are an essential transportation alternative for patrons who do not own private motor vehicles (Tyger Valley 2019). Similarly, the Bayside shopping centre is located at the busy intersection of West Coast road and Blaauwberg road. It is also connected to transport infrastructures such as the MyCiti bus and minibus taxi services (Bayside n.d.; MyCiti Business plan 2012). Location and parking are important as they can influence convenience. Ideally, the location should be central, easily accessible and near public transport nodes. Public transport is an important consideration in the South African context as a large per cent of the population is reliant on this mode of transport to commute between places (Wong *et al* 2001). Bayside shopping centre has over 100 stores that included a cinema, specialty stores and various restaurants (Bayside n.d.). Similarly, Tyger Valley shopping centre offers a wide tenant mix of over 250 stores that also included a cinema, medical care, restaurants, toy, furniture and décor stores (Tyger Valley 2019).

A well-balanced tenant and merchandise mix provide a wide range of products and services to satisfy patrons’ preferences and consumer needs (Ahmed 2007; Anning-Dorson *et al* 2013). Their consumer needs are met by seeking and learning about new products, current trends as well as technology and can only be explored by what is available on the market (Ahmed 2007; Anning-Dorson *et al* 2013). The literature suggests that shopping centres’ layout can influence a patron’s behaviour and perceptions of the establishment. This can be achieved through ambience, store flow as well as the placement of merchandise.

Both Bayside and Tyger Valley shopping centres had elements of a dumbbell layout. It is comprised of two lanes with a path between these lanes. This allows maximum exposure of the tenants in the shopping centre that guides the patron through a myriad of promotions and other shopping opportunities (Krugel 2010). It also allows a patron to easily locate and access stores, restrooms and other services, especially for those who are from different geographical areas (Teller & Elms 2010).

The various store managers at Bayside and Tyger Valley shopping centres indicated that the main attractions were the merchandise and products that were offered. When asked what attracted patronage store managers indicated "a wide variety of affordable products" while others stated "uniqueness of a product." Elements of a retail mix include aspects of both pricing as well as a variety of merchandise. Pricing should achieve profits for the retailer and to satisfy patrons' needs. There are three pricing options. The first option is discount orientated. This occurs when a price becomes a competitive advantage and is targeted at the price-conscious patron (Berman & Evans 2003). The second option is the average price which is directed at the middle-income patron. The third option is the upscale orientation that is directed at the high-end patron (Berman & Evans 2003). Furthermore, uniqueness of a product is defined as one of a kind and also unusual. Merchandise from speciality stores are often unique and regarded as hard to find items. As its offering is rare, patrons will travel further distances and pay higher prices to acquire these type of merchandise (Grewal 2012).

3.3 FACTORS INFLUENCING AND DISCOURING PATRONAGE AND SPEND

Centre management at Bayside and Tyger Valley shopping centres agreed on elements such as a variety of merchandise, good service levels and sufficient parking. Variety of merchandise forms part of the tenant mix offerings that was discussed in 3.2. The literature on service levels is related to the behaviour of retail employees. Service delivery is dependent on the quality of management (Hartnardy 2010). Factors such as product knowledge, appropriate skill set, courtesy and friendliness play an important role in service delivery. Employees using these attributes are more likely to provide a good shopping experience for a patron (Hartnardy 2010). Furthermore, a culture of patron service can be adopted through guiding norms and standards as well as set expectations for employees. A Service culture has a direct impact on a patron's perception in terms of patron loyalty, repurchases and patron frequency to a store or shopping centre (Richey & Reynolds 2011).

Bayside and Tyger Valley shopping centres had sufficient and secured parking bays. The former offers 1900 parking bays in the open-air and undercover parking. It was monitored by security on a 24-hour base and included special accessibility facilities for disabled people and pregnant women.

Furthermore, parking is free the first hour and R5 thereafter no matter how long a patron remains in the shopping centre (Bayside n.d). Similarly, Tyger Valley shopping centre offered secured open-air and underground parking. Also for patron friendliness special facilities were offered for disabled people, pregnant women and parents (Tyger Valley 2019). Kirkup & Rafiq (1999) state that patron orientated services create a positive shopping experience. This can be achieved through design elements such as restroom, special parking and other facilities for disabled persons. Furthermore, free parking reduces the visitation cost and it is also important that adequate parking space is available as it can improve the convenience and shopping experience of a patron (Krugel 2010). Store management at Bayside and Tyger Valley shopping centres indicated service levels and "up to date merchandise" as well as "the way in which merchandise is presented and promotions." The following aspects are discussed below.

Social media platforms such as Twitter, Facebook, Pinterest, Instagram as well as retail websites became a fast and accessible method to interact with patrons. These platforms communicate promotions and new merchandise that keeps a patron up to date with the latest market trends (Berman & Evans 2013). Furthermore, a patrons' first impression is created from what is presented in the immediate shopping environment. The way merchandise is presented forms part of the internal elements of store design and display (Wakefield & Baker 1998). The way merchandise is presented and displayed should influence a patron on a psychological level that will modify their behaviour. The objective is to lengthen the time spent, increase spending and to improve the likelihood of continuous patronage to a store or shopping centre (Cloete & Price 2010).

Centre Management at Bayside and Tyger Valley shopping centres agreed on aspects that discouraged patronage and spend. The former stated that not having the correct merchandise, complaints about service levels, and the inconvenience of minibus taxis on the property negatively affected patrons. The later indicated wayfinding, the poor state of facilities such as elevators and limited parking created a negative perception of the shopping centre. When a patron is subjected to a poor shopping experience that is a result of a lack of representation of certain brands, poor patron services and facilities they develop a poor mental image of a retail outlet. This results in a series of negative implications for centre management as a patron is most likely inclined to spend less and reduce the frequency of patronage to a shopping centre (Berman & Evans 2013).

The retail image focuses on the entire shopping centre as a unit and not on individual stores. When a patron perceives a shopping centre that evokes a poor experience a negative image is developed (Sit *et al* 2003). Subsequently, a patron would most likely select a shopping centre that satisfies his or her needs over one that does not (Levy & Weitz 2013). All together store management at Bayside and Tyger Valley shopping centres agreed that inconvenience discouraged patrons from spending at the store level. The former indicated competition in the shopping centre and the store environment. The latter indicated a lack of facilities such as no trolleys and a shortage of fitting rooms as well as the general state of the economy.

Competition in the shopping centre relates to how a brand holds a favourable position in the market share. It also relates to and how a brand is perceived as more desirable and superior than a competitors offer (Ma 2000). Competitive advantage is achieved in three ways. The first is a unique selling proposition and is the factor which differentiates one product from another. The second aspect is to know who the competitor is as well as their marketing, pricing and production strategies. The third factor relates to knowing who the target audience is and possible potential target audience. Applying these strategies will most likely improve patronage and profits (Ma 2002). More than 50% of patrons who make use of fitting rooms purchase more than three times than patrons who do not utilize them. Poor-fitting room experiences have driven patrons to neglect their potential purchase ambitions that resulted in both a loss in the sale and negative reputation for retailers (Choo *et al* 2015). The same is applied to not having a trolley in a store. A patron is more likely to make bigger purchases with the support of a trolley than not having access to this facility (Darren *et al* 2009).

3.4 IMPROVING FOOT COUNT AND SPEND

Centre management at Bayside and Tyger Valley shopping centres both had marketing departments and planned events to bolster foot count. Interesting the planned events between the shopping centres differed in scale. Bayside shopping centre focused less on event planning. Instead, centre management concentrated its efforts on a relationship marketing strategy. Tyger Valley shopping centre focused on major planned events and adopted a mixed marketing strategy. The following section discusses the planned events and the various marketing strategies adopted by different marketing teams. Also, the last section looks at the perspective on the marketing efforts of centre managers.

Bayside's shopping centre management efforts were focused on improving service standards and building relationships with their patrons. Previous endeavours were targeted on promotional campaigns such as spend and win competitions however the team has shifted its objective to become patron orientated and improve patron satisfaction levels. As a result of the centre managements marketing strategy, the planned events were relatively low. The marketing team acknowledged the commercial calendar however did not implement events for every commercial occasion. Examples of the planned events include Mother's Day and Christmas. During the Christmas period, certain activities were planned such as gift wrapping, photographs with Santa, letters to Santa and a cracker tree. Conversely, Tyger Valley's shopping centre management actively used various social media platforms, radio and published advertisements to attract and increase foot count. Centre management also followed the commercial calendar and therefore planned events throughout the year. Examples of popular events included Valentines' Day, Mothers' Day, Easter, and Christmas. Also, other major events included the National Bridal Week, Taste of Tyger Valley, back to school campaigns as well as Tyger Run and Carols by Candlelight.

Centre management at Bayside shopping centre used a relationship marketing strategy. It does not primarily focus on short term goals such as patron acquisition, immediate sales or improved foot count. Rather, the approach is to establish strong emotional patron connections to a brand, store or shopping centre. The objective is to develop and maintain an on-going relationship between the various parties (Buttle 1996). The acquisition of new patrons can be a challenging and expensive process. This marketing strategy helps to preserve patrons over a long period. The outcome would result in patrons that are loyal and not patrons who purchase once-off or infrequently visit a retail outlet (Buttle 1996). Furthermore, it allows centre management to stay in close contact with patrons. The added advantage is it gives the marketing team time to understand how patrons perceive and use a brand or service as well as to observe unmet needs. As a result brands, stores and shopping centres can develop new offerings and features to meet patrons' needs which will further strengthen the relationship (Buttle 1996). The marketing strategy adopted by the Bayside shopping centre management explained why planned events were relatively low in the centre. Their objective was to build a loyal patron base and not a point of sale patron base. Centre management at Tyger Valley Shopping Centre used a mixed marketing strategy that involved tradition, transactional and online marketing (Roger 2001). Traditional marketing assists marketers to reach out to a target and semi target audience using various offline promotional and advertising material. This marketing strategy is hard to ignore and includes five major categories such as print (magazine and newspapers) Broadcast (radio and television), direct mail (postcards and catalogues), telephone (telemarketing) and outdoor advertisement tools (billboards and fliers) (Roger 2001).

Transactional marketing is based on single-point sale transactions. The focus is to maximize the volume and efficiency of sale transactions rather than to build a relationship with a patron. Transactional marketing does not emphasize relationships therefore it can lead to short term patron encounters (Roger 2001). Online marketing involves a process of promoting a brand, store or shopping centre and its products and services over the internet. The purpose is to drive traffic to a shopping centre and to generate leads and sales. Furthermore, it can also be used to communicate a message about a brand, store and shopping centre as well as to conduct research (Roger 2001). The social media platforms used by centre management included Facebook, Instagram and Twitter. The marketing strategies and planned events at Tyger Valley shopping centre are in alignment with each other. Centre management planned for major events that drove high volumes of foot count. The marketing strategies are geared towards promoting these events through various advertising tools and to maximize point of sales using transactional marketing.

The response of store managers that related to centre managers marketing interventions was of a mixed nature. The overall tenants at Bayside shopping centre indicated that centre management could improve foot count and should focus more on promotional and advertising material. Some tenants indicated they were not affected by centre management's strategies while other tenants indicated marketing efforts improved foot count and spend in their stores. Conversely, the majority of tenants at Tyger Valley shopping centre indicated that planned events boosted foot count and sales turn over in their respective stores. They were satisfied with the marketing strategies adopted by centre management and it also strengthened the relationship between the tenants and centre management. The success of a shopping centre and individual stores is dependent on the relationship between centre management and their tenants. Tenant maintenance has become highly important and centre management should retain their tenants as it is more expensive to attract new ones (Harmse 2014). The relationship between centre management and the various tenants strives to provide a profitable return for all (Fisher & Lentz 1990). Even though all parties work towards the same goal, centre management has the greater responsibility to improve the business environment through effective management of tenant mix, leases, operations as well as promotions and the use of other marketing strategies (Fisher & Lentz 1990). The results should promote a marketing approach whereby centre management encourages patron loyalty through a balanced tenant mix and a well maintained and organized shopping centre. At the same time, it should also improve and develop greater mutual benefits and cooperation between centre management and tenants (Fisher & Lentz 1990).

3.5 STORES THAT ATTRACT THE MOST AND THE LEAST PATRONS

This section looks at the stores that attract the most and least patrons. The stores at Bayside shopping centre which attracted the most patrons were the larger anchor stores. Conversely, the small specialty stores attracted the least foot count to the shopping centre. Similarly in Tyger Valley shopping centre, the larger anchor stores accounted for the highest foot count. The smaller stores in the shopping centre attracted the least patrons. Anchor tenants play a significant role in the success of a shopping centre.

Traditionally the bigger and stronger an anchor is, the better the chances are of attracting patronage to a shopping centre. Anchor stores usually account for 30% of total foot count in a shopping centre and while it may offer several small stores, it is mostly known for the presence of the anchor stores (Finn & Louviere 1996). Smaller tenants benefit from the anchor stores. The multiplier effect suggests that patrons who shop at anchor stores are more likely to visit and spend at smaller stores. There are many disadvantages for smaller tenants in shopping centres such as high leasing fees, a reduction in profits and strong competition (Harmse 2014). However, specialty stores are vital for shopping centres as they offer differentiation and cater to niche markets. Moreover, smaller tenants understand their clientele and can develop long-standing relationships with patrons. They also require smaller floor space which means they can fill unusual floor size space in a shopping centre that would not be possible for larger tenants (Harmse 2014)

3.6 BUSIEST PERIODS AND LEAST BUSY PERIODS

Patronage patterns were similar at both Bayside and Tyger Valley shopping centres. The former establishment experienced the least busy periods during the week whilst the busiest periods are evident over weekends. Similarly, Tyger Valley shopping centre is least busy during the week and foot count started to pick up on a Thursday. The busy periods were observed over the weekend.

3.7 CENTRE MANAGEMENT CHALLENGES

Centre management at Bayside and Tyger Valley Shopping centres expressed different challenges. The former indicated patrons are always changing their preferences and needs. It was also a challenge for the shopping centre to maintain its market share and for tenants to align with the shopping centre objectives. The challenges for the latter establishment included the introduction of house rules for new tenants, Eskom, national strikes, consumer confidence and competition in the market place.
Understanding the preferences and needs of a consumer will always form part of the retail landscape. The decision-making process becomes challenging when a consumer has a wide assortment of products to choose from. This challenging environment together with market competition should signal marketers and researchers to understand consumer behaviour (Lawrence 2012). Understanding consumer behaviour is a challenging and ongoing process as it is not organized, simple or automated. Therefore, marketers and related parties should award sufficient time and energy to better understand consumer behaviour (Hawkins & Mothersbaugh 2013). Strikes in South Africa are becoming more and more common. The impacts of these strikes are said to negatively impact the economy as productivity is reduced, businesses suffer and consumer confidence is lowered (Affirmative portfolio

n.d.) Surprisingly during the 2010 economic downturn retailers reported that strikes had no impact on sales output. In-fact during the strike period, credit debit card swipes saw an upward movement. This was because strikes became part of normal labour relations processes and a level of confidence confirmed a solution would be found (Affirmative portfolio n.d.; Economy 2010).

All retail companies operate within the macro environment and must therefore adapt to changes that arise. Retail sales are a direct impact of the economic environment. A strong economy results in consumer disposable income as well as an increase in sales revenue. Conversely, a weak economy reduces consumer spending and causes less spending and less in sales turn over. Furthermore, government and economic factors tend to overlap in areas such as corporate tax and inflation which also lowers purchasing power (Treadwell 2019). Electricity blackouts are bad for business in general. Smaller businesses can mitigate the effects by using generators. However, larger businesses cannot operate without an adequate supply of electricity and therefore negatively impacts the economy. Solving Eskom's problems will solve other problems too
(Kruger 2019).

3.8 SHOPPING CENTRE GROWTH PATTERNS

Centre Management at Bayside and Tyger Valley shopping centres confirmed annual growth but not without challenges. "Bayside has always grown and continues to grow. The introduction of a new competitor into the catchment area has impacted the market share. In recent years the economy has also played against the revenue growth however there has been a steady growth pattern from 2017 to 2019." Centre management at Tyger Valley shopping centre stated "the shopping centre has undergone a two year refurbishment period from 2010 to 2012. Year on year the centre has shown an average growth of 2.2%. Influences are predominantly from departmental stores.
The Edcon Crisis has also had an effect as they closed C N A, La Senza, Accessorize and Boardmans in 2018/2019. Competition from the Cotton On Group has created competition for Foschini, Truworths, Mr Price & Woolworths and diverted their market share. The entrances of International Brands like LC Waikiki, H & M & Zara had a negative impact on the SA Retail sector."

Table 3.1 compares the performance measures of the Bayside and Tyger Valley Shopping Centres against the national averages for regional shopping centres. These measures include the average spend per head, the average dwell time and the average amount of stores visited. - indicates data was not available.

Table 3.1 Performance Measures

Performance Measure	**Bayside shopping centre**	**Tyger Valley shopping centre**	**National Average for Regional Centres 2019**
Average spend per head	R153.00	R229.18	R189.10
Average dwell time	50 minutes	71 minutes	-
Average amount of stores visited	3-4 stores	3-5 stores	-

Source: Bayside & Tyger Valley centre management (2019); MSCI (2019)

Table 3.2 indicates the average spend per patron within different store categories. Stores within the same category were compared to one another.

Table 3.2 Average spend per head at the store level

Store Category	**Bayside shopping centre**	**Tyger Valley shopping centre**
Food	R75.00	R90.00
Electronics & Cellular	R6000.00	R350.00
Fashion	R1000.00	-
Anchor Store	R3000.00	R850.00

Source: Bayside & Tyger Valley centre management (2019)

3.9 PATRON PERCEPTIONS: PRIMARY REASONS FOR PATRONAGE

This section of the chapter relates to the questions that were asked to patrons. It discusses their motivations for shopping centre patronage and spending patterns. Each subsection relates to a question that was asked during the rapid appraisals and is accompanied by a figure and discussion.

In retrospect, the International Council of Shopping Centres defined a shopping centre as an enclosed space with good lighting, climate control that offers a variety of stores (Chebat, Hassen & Ruiz, 2004). This definition resonated with a large per cent of patrons whose main reason for patronage was to shop in a safe and secured environment. Patrons enjoyed the convenience of visiting a centre that offered "everything in one place" and that had "many stores under one roof." The type of shopping patrons undertook was primarily for grocery and clothing (see Figure 3.1). Typically anchor tenants in regional shopping centres either have two supermarkets (± 3 500m²) or one supermarket

(± 8000m²). These supermarkets include Shoprite, Pick N Pay or a Checkers Hyper. Clothing anchors stores such as Edgars, Mr Price, Woolworths, Foschini and Truworths are also usually present in shopping centres on such scale (Prinsloo 2010b).

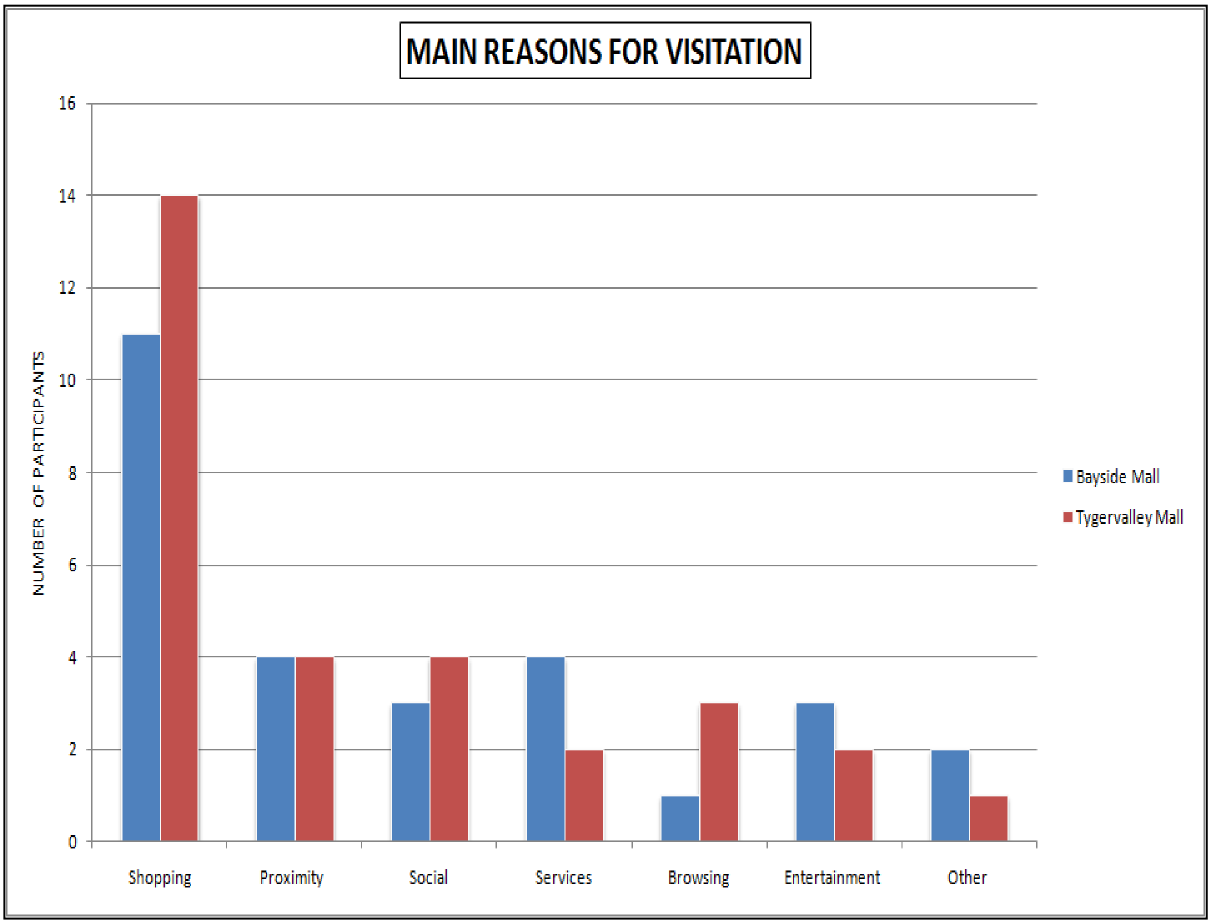

Figure 3.1 Main reasons for patronage

Respectively Tyger Valley shopping centre offered a Pick & Pay supermarket while Bayside shopping centre offered a Checkers. These were the primary stores' patrons purchased their grocery and associated items from. Both shopping centres offer a wide variety of clothing anchors that provided patrons with a wide selection of clothing merchandise to choose from. Relating to but not similar to shopping was the purchase of services (See Figure 3.1). Patrons are more like to visit a shopping centre that offers a variety of products and services that will meet their preferences and needs (Wakefield &Baker 1998). Patrons at Bayside shopping centre made use of the various services offered in the complex. One patron stated she came "to the shopping centre to do banking" while another patron came for "computer repairs" and to do "printing on jackets." Interestingly a patron who lived close to the shopping centre only came to "use the free wifi service" that was offered to everyone. The patron was pleased to save on internet costs. Similarly, patrons at Tyger Valley shopping centre frequented the shopping complex to make use of the services that were offered. One patron indicated they visited "for postal services" while another patron made use of "medical services" offered in the shopping centre.

Browsing amongst patrons was not regarded as the primary reason for patronage to the shopping centre (See Figure 3.1). As a result of shopping, it became a secondary activity. For example, a patron at Bayside shopping centre who primarily came to do banking said she also did "browsing in stores" after her tasks were completed. Similarly, a large per cent of patrons at Tyger Valley shopping centre indicated that when going for shopping purposes they also browsed the available merchandise at the same time. The second important reasons why patrons visited Bayside and Tyger Valley Shopping centres was based on location (See Figure 3.1). Patrons will travel great distances for grocery shopping especially where there is a wide selection of choice and value for money. However, convenience in terms of location has been identified as a major factor in the selection of a shopping centre and patronage frequency (Severin 2001). As a direct result, patrons tend to visit the nearest shopping centre to where they live (Bromely & Thomas 1995).

Moreover, the location also includes the proximity between a patron's place of work and the shopping centre. Regional shopping centres are commonly associated with the establishment of mix-use nodes such as office firms, retail facilities, entertainment and residential development (Prinsloo 2010b). This resulted in a pool of patrons who do not live in the catchment area however frequent the shopping centres because of its proximity to their place of work. One respondent at Bayside shopping centre said she passed "through the" shopping centre during work commutes to sometimes "shop and to compare prices." Another patron at Tyger Valley shopping centre stated that he "visited the shopping centre on most days to have lunch.” Social interaction has also been identified as a driver for shopping centre patronage (See Figure 3.1). The literature suggests that shopping centres provide a myriad of ways in which patrons can satisfy their social needs. A shopping centre provides a patron with restaurants and other spaces to meet up with friends, people watch or to be a part of a crowd (Karande & Merchant 2012).

Patron’s social activities at Bayside shopping centre mainly included to meet up with friends and work colleagues. One patron who sat on a bench said she enjoyed “looking at the people” in the shopping centre. Another respondent said she came to the shopping centre “to meet up with a friend.” The majority of patrons at Tyger Valley shopping centre indicated they enjoyed going to “restaurants” where they would socialize with friends and family. Patrons are more likely to frequent a shopping centre that offers a form of entertainment in the tenant mix. Entertainment includes movie theatres, restaurants and also recreational areas such as public open spaces (Wakefield & Baker 1998; Frasquet & Molla 2001). Bayside is the only shopping centre in its catchment area that offered a cinema. This factor distinguishes it from other shopping centres in the same catchment area. Three respondents at Bayside shopping centre stated that their main reason for visiting was because of the “Cinema.” Correspondingly a patron at Tyger Valley shopping centre came “to the cinema to watch a movie.” Another patron stated that he “came to watch sport” in the entertain/food court of the shopping centre. The Tyger Valley food court included a large television and seating area where patrons were able to enjoy meals and at the same time watch popular televised programs i.e. sporting matches.

The other category is defined by patrons who differ from the main group of respondents. To elaborate, a patron at Bayside shopping centre primarily visited to conduct business. He sold spectacle frames to optometrists. Another patron-only visited to “kill time” as a family member underwent an operation at a nearby hospital. The same scenario occurred at Tyger Valley shopping centre. A patron only visited the shopping centre to “pass time” as a family member underwent an operation at a nearby hospital. Furthermore, another patron only visited the shopping centre to “get out of the house.” Shopping centres can be viewed as fun establishments that allow patrons to escape from daily problems and to alleviate stress (Tauber 1995). A shopping centre can be perceived as a form of recreation that offers patrons something to do when they are feeling bored.

3.10 PATRON PERCEPTIONS: WHAT ATTRACTS PATRONS

Convenience is associated with the value that a patron derives through a shortened expenditure of energy, time and money (Kim 2000). Aspects such as the layout of a shopping centre, its location as well as parking can influence convenience, patron frequency and its overall image (Wong *et al* 2001). Town planning and market research are processes that influence the location of shopping centres. A judgment in error can significantly lower patronage and sale revenue. The optimal location allows ready access and at the same time attracts a large number of patrons (Prinsloo 2010a). A large per cent of patrons in both Bayside and Tyger Valley shopping centres stated that convenience attracted them (See Figure 3.2). Convenience in terms of location was highly referenced amongst patrons. For instance, several patrons from Bayside shopping centre indicated that visiting the shopping centre was convenient as it was "close to home" while another patron stated it was "close" to where they worked. The locality of both shopping centres allowed patrons ease of access. Living and working close to the shopping centres meant patrons saved on time and enjoyed a shorter commuting distance. It also meant that patrons saved on travelling costs.

A third patron stated he was attracted by the "efficiency of the" shopping centre and that he did not have to spend hours "searching for things." Furthermore, a fourth patron found the shopping centre "not too big" and "functional" as "parking and stores were conveniently placed." Moreover, the fifth patron indicated the "parking is nice" and "there are many entrances."

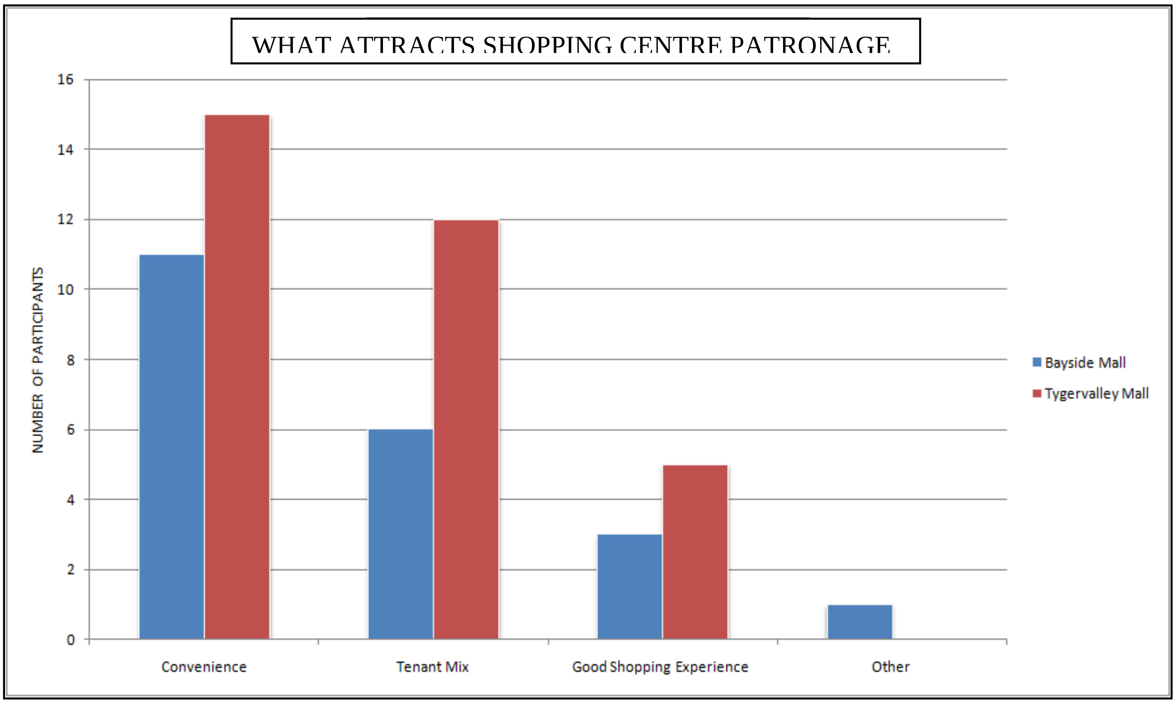

Figure 3.2 What attracts shopping centre patronage

The last aspect that was associated with convenience was having many stores in one location. A patron at Bayside shopping centre stated: “everything is here, Game, Checkers and banks.” Equally a patron at the Tyger Valley shopping centre enjoyed that “everything is under one roof” while another patron expressed “all my favourite stores are here.” The patrons illustrated the convenience of having many stores in once place. Therefore, eliminating the need to undertake multiple trips to shop and to make use of services. The second most attractive aspect of the shopping centre was the tenant mix (See Figure 3.2). The tenant mix can determine the success of a shopping centre as the correct balance will attract patrons and increase the sales for retailers. Conversely, a shopping centre that is not able to satisfy the needs of a patron is viewed as less desirable and will have an adverse effect on retailers and the shopping environment (Teller & Reutterer 2008).

Patrons in both shopping centres generally stated they were attracted by the variety of stores of which appealed to them. A patron at Bayside shopping centre indicated she was attracted by “lots of stores” in the centre. A second patron stated that “it has the basics I need” while a third patron mentioned that “I get everything I want here.” Similarly, patrons at Tyger Valley shopping centre expressed that “it is convenient, it has all the shops that I need” as well as “all my favourite clothing stores are found here.” Most patrons found the shopping centres attractive because of the “variety of stores” with one patron who also referenced the “variety of merchandise.” The category of a good shopping experience was derived from how a patron experienced the shopping environment and the perceptions it evoked (See Figure 3.2). An aspect that can influence a patrons shopping experience is associated with aesthetics, which is commonly known as the atmospherics. There are many ways a patron can perceive a shopping centre. It can be perceived as dull and unattractive or cheerful, attractive and pleasant (Ahmed *et al* 2006). Atmospherics is important as it can influence the behaviour of a patron. Positive atmospherics can motive a patron to spend a long time and entice a patron to frequent the shopping centre more often. Poor atmospherics hold the exact opposite which can build a negative retail image for the shopping centre (El Hedhli *et al* 2013). A patron at Bayside shopping centre stated she enjoyed the “atmosphere” and that she found the environment to be “pleasant.” Also, another patron said she liked the shopping centre because “it is never full or overcrowded” whilst a third patron stated she found the shopping centre “clean and tidy.” Patrons at Tyger Valley shopping centre shared similar sentiments of the shopping environment. Two patrons felt the shopping centre was “neat and clean” while another patron stated she enjoyed the “user-friendliness.” Patrons also noted the “pleasant parking” they experienced which they did not pay for. As part of the other category, a patron at Bayside shopping centre stated “promotions that are advertised online” attracted her to the shopping centre. For example, when Mr Price advertised promotional items she would visit the shopping centre.

3.11 PATRON PERCEPTIONS: DISTANCE TRAVELLED

The catchment area is defined as a sphere surrounding an area of influence or importance. In this case, the important areas are the Bayside and Tyger Valley shopping centres. The retail catchment refers to a geographical area of which a shopping centre will draw its main patrons (Dolga, Palvis & Singleton 2015). Majority of the patrons at Bayside shopping centre came from the primary catchment area and travelled less than 10km (See Figure3.3). The patron base constituted 65% of total respondents that came from the Tableview, Blaauwbergstrand, and the Dunoon area. These patrons lived close to the shopping centre and therefore were able to frequent more regularly and travelled shorter distances at lower costs.

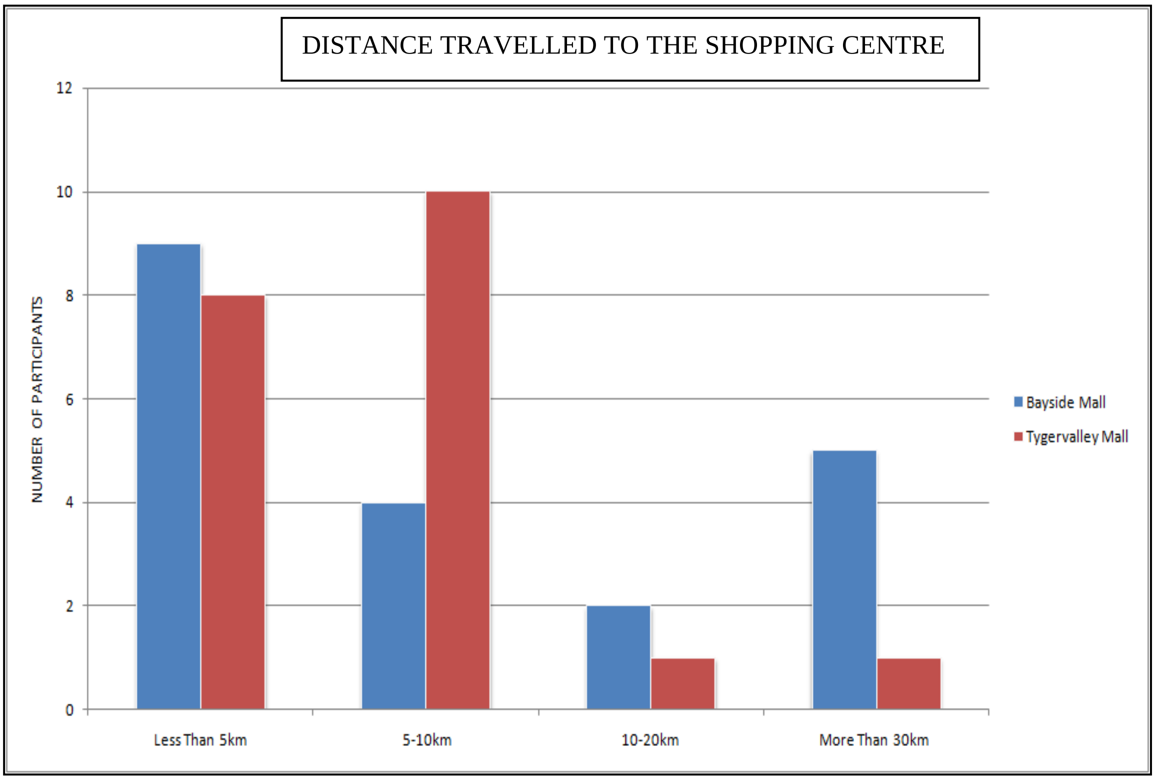

Figure 3.3 Distance travelled to the shopping centre

Patrons who travelled between 10kms and 20kms fell with the secondary catchment and made up 10% of the respondent base. These areas included the Milnerton and Melkbosstrand areas. The tertiary catchment area is comprised of patrons who travelled more than 30 km that included small towns such as Atlantis, Darling, Mamre and Malmesbury. Interesting the respondent base in this category was higher than the secondary catchment base making up 25% of total respondents. This is because the retail market in small towns are generally limited and offer a small range of products to a patron. Therefore, patrons sought different shopping options that could satisfy their preferences and needs. A patron from Darling said she came to Bayside shopping centre because “they don’t have the stores where I live.” Similarly, a patron from Atlantis shared the same sentiment by stating “they have more shops here.”Similarly, the majority of the patrons at Tyger Valley shopping centre came from the primary catchment area which constituted 80% of the total respondent base (See Figure 3.3). These patrons travelled less than 10kms and came from suburbs such as Bellville, Durbanville, Parow, Brackenfell, and Plattekloof. Patrons who travelled from the secondary catchment area constituted 10% of the respondent base. Suburbs in this catchment included Kraaifontein, Kuilsriver and Brackenfell. There were no patrons from the third catchment area which included suburbs such as Milnerton, Athlone and Rondebosch. A patron in the other category travelled more than 300 km from Vanrynsdorp to make use of a hospital that was closely located to the shopping centre.

3.12 PATRON PERCEPTIONS: VISITATION FREQUENCY

Shopping centre frequency refers to how often a patron visits a shopping centre. Frequency of visitation is based on many aspects. One aspect to consider is consumer behaviour. For instance, patrons who time manage that allocates a specific length of time to spend in a shopping centre are identified as less likely to frequent a shopping centre than patrons who are more flexible with their time (Roy 1994). A second aspect that influences visitation frequency is associated with transportation cost and the distance travelled. For example, neighbourhood shopping centres experience a higher per cent of daily visits than that of regional shopping centres. This is because smaller shopping centres are designed to provide daily essentials. Whereas offerings from bigger shopping centres are from specialty and departmental stores. Trips are shorter therefore costs are reduced with improved convenience (Prinsloo 2016; Roy 1994). The study does not enquire about the underlying reason for patron visitation frequency. However, it looks at the frequency of visitation patterns. Patrons who frequented Bayside shopping centre for less than five times a month were attributed to various reasons (See Figure 3.4). A patron who usually does her shopping in the Milnerton area said she only came to this shopping centre “because of the Dischem.” Similarly, another patron only visited the shopping centre “to watch a movie” and to shop at “Dischem.” While a third patron also referenced “the movies.”

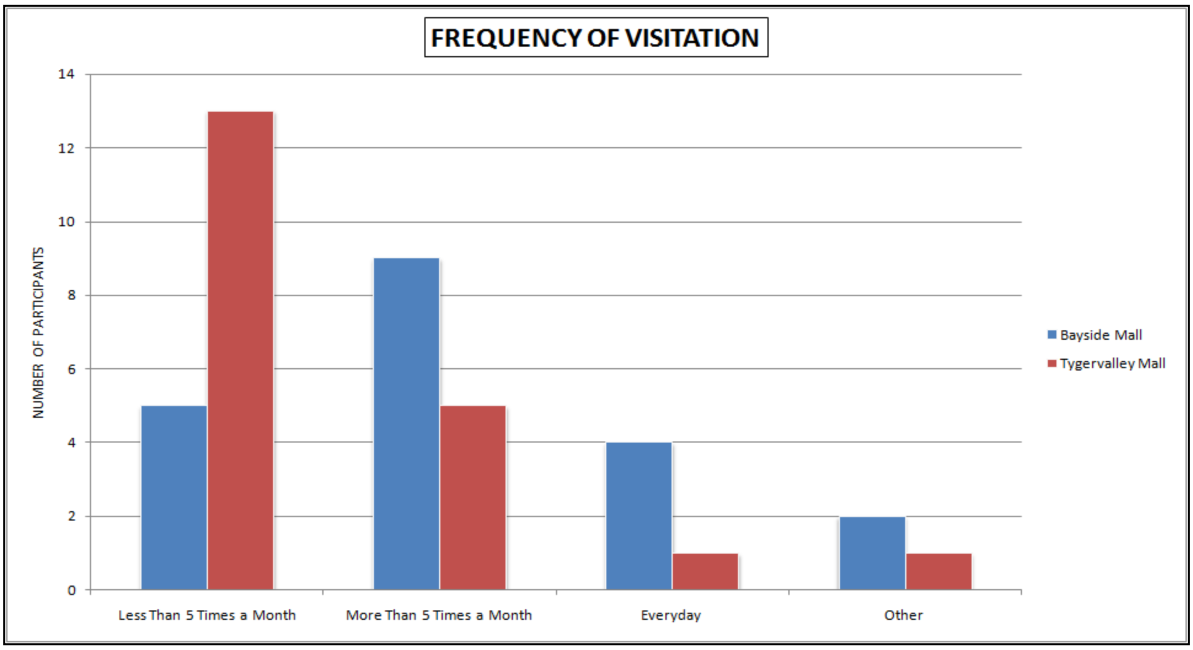

Figure 3.4 Frequency of visitation

These patrons were attracted to the shopping centre for specific offerings that in some cases were not available in their immediate retail environments. The reason for the low frequency can be understood in that patrons usually stock up on toiletries and associated supplies once a month at Dischem. Also, movies are not released on weekly bases which could account for the low patron frequency. Another factor could be associated with distance travelled and travelling costs. Majority of patrons who frequented more than five times lived or worked close to the shopping centre. One patron stated that it was "easy and cheap to get to the shopping centre with the MyCiti bus." Living near to a shopping centre incentivize patrons as they have short commuting distances with low transport costs, therefore, they can frequent a centre more often (Roy 1994). Interestingly some patrons frequented the shopping centre every day. These patrons lived less than one km from the shopping centre while other patrons passed through the shopping centre every day to get to work. Two patrons were placed in the other category. The first patron frequented the shopping centre every two years as she travelled over 100kms from Langebaan. The second patron frequented the shopping centre once every six months as he only visited for business opportunities.

Conversely, the majority of patrons at Tyger Valley shopping centre who frequented less than five times a month lived within a 5 km radius. This was because patrons were mainly motivated to visit the shopping centre for social and entertainment purposes. A patron said he came to the shopping centre "to get out of the house" and another patron came to "socialise." A third patron stated he came to the "cinema" and the "restaurants" occasionally. Another two patrons made use of "medical services." Majority of the respondents who frequented the shopping centre more than five times a month also fell within the primary catchment area. The general incentives observed are the short commuting distances that are associated with a reduced travel cost. Also, the free parking at the shopping centre incentivized patrons. A patron who frequented the shopping centre every day was an elderly gentleman who was "bored of being at home." It provided him with daily entertainment and activities to do such as "watching sport" and visiting "restaurants." The patron in the other category frequented the shopping centre over one or two year periods. This is because she lived in a small town over 300kms away from the shopping centre.

3.13 PATRON PERCEPTIONS: DWELL TIME

Dwell time refers to the length of time a patron spends in a shopping centre. There are various factors that influences dwell times in both positive and negative ways. For instance, dwell time can be lengthened through an optimum and exciting tenant mix or offering. Conversely, an uninteresting tenant mix or shopping environment can significantly reduce dwell times (Lattimer Appleby 2014). Another important aspect that influences dwell time is party size. Females tend to dominate the shopping population and are the preferred shopping companions. Women commonly view their male counterparts as impatient, killjoys who limit their browsing opportunities. Also, children are not regarded as ideal shopping companions either. This is due to their short attention spans and are mainly concentrated on their own needs (Lattimer Appleby 2014)

Patrons at Bayside and Tyger Valley shopping centres were satisfied with the tenant mix which positively impacted on dwell times. Furthermore, a trend observed at Bayside shopping centre showed a patron who engaged in one activity dwelled for a short period when compared to a patron who engaged in multiple activities. For example, one patron spent less than one hour in the shopping centre to shop for groceries. Conversely, another patron who also did grocery shopping and hung out with friends in the shopping centre had an average dwell time of two-three hours. (See Figure 3.5)

Tyger Valley shopping centre patrons who dwelled for less than one hour were attributed to familiarity with the layout of the shopping centre or who had children as companions. One patron stated she had three children and therefore stayed for "less than one hour" she also stated, "without the kids, I am able to shop for longer." Similarly, another patron dwelled for less than one hour as he brought his "daughter to see the doctor." Other respondents who dwelled for less than one hour knew where to find stores in the shopping centre. This allowed them to complete their shopping activities quickly and to save on time while doing so.

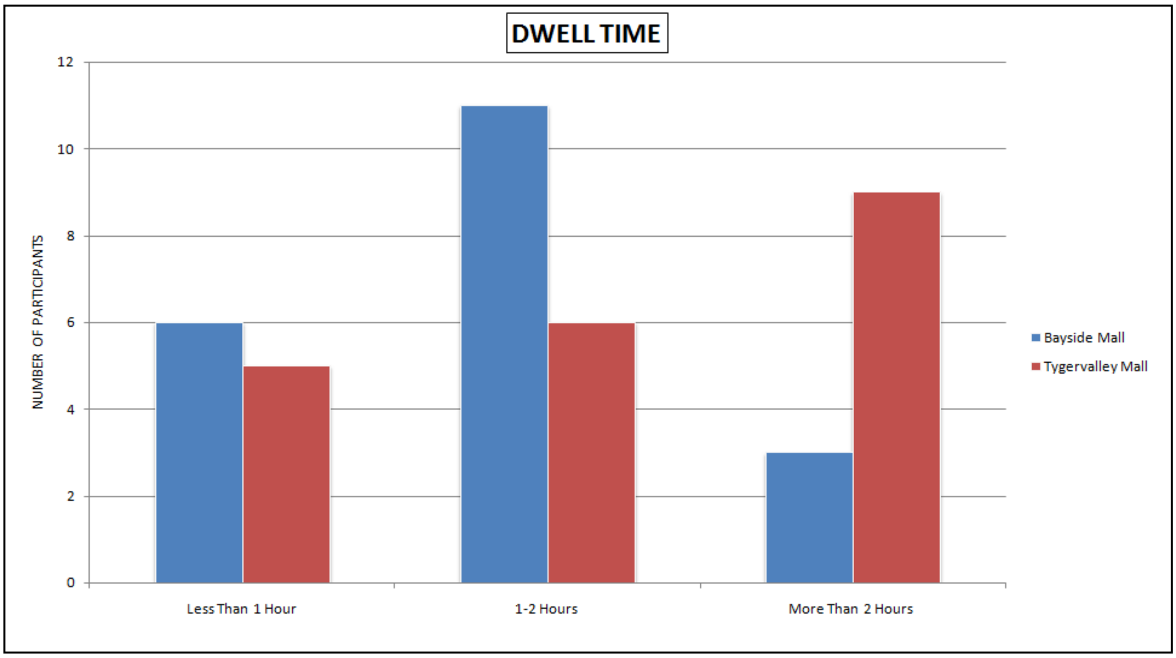

Figure 3.5 Dwell time

The same pattern observed at Bayside shopping centre was evident amongst patrons at Tyger Valley shopping centre. Patrons who engaged in multiple activities dwelled for longer periods in the shopping centre. One patron who shopped for clothes and food dwelled for less than one hour. While a second patron who engaged in the same activities but included a visit to a restaurant dwelled for more than two hours.

3.14 PATRON PERCEPTIONS: PREFERRED SHOPPING DESTINATION

Many factors should be considered when a patron selects a shopping centre to shop and undertake related activities. The literature suggests that the implementation of a comprehensive retail strategy involves building an appropriate tenant mix that will deliver a competitive advantage and to satisfy the shopping needs of a patron (Berman & Evans 2013). The findings to this point explored these aspects. A large per cent of patrons indicated that an attractive feature of a shopping centre is the variety of stores found in them. Also, Bayside shopping centre has a competitive advantage in its catchment area as it offered a cinema. Another important aspect is that of the retail image. The brand of a shopping centre focuses on the building itself and not on the individual stores. It is how a consumer interprets and visualizes a shopping centre as well as the types of emotions the retail environment evokes. How a patron perceives the retail image of a shopping centre directly influences patronage and spend in the retail complex. It is partly a result of psychological attributes and functional qualities (Sit *et al* 2003).

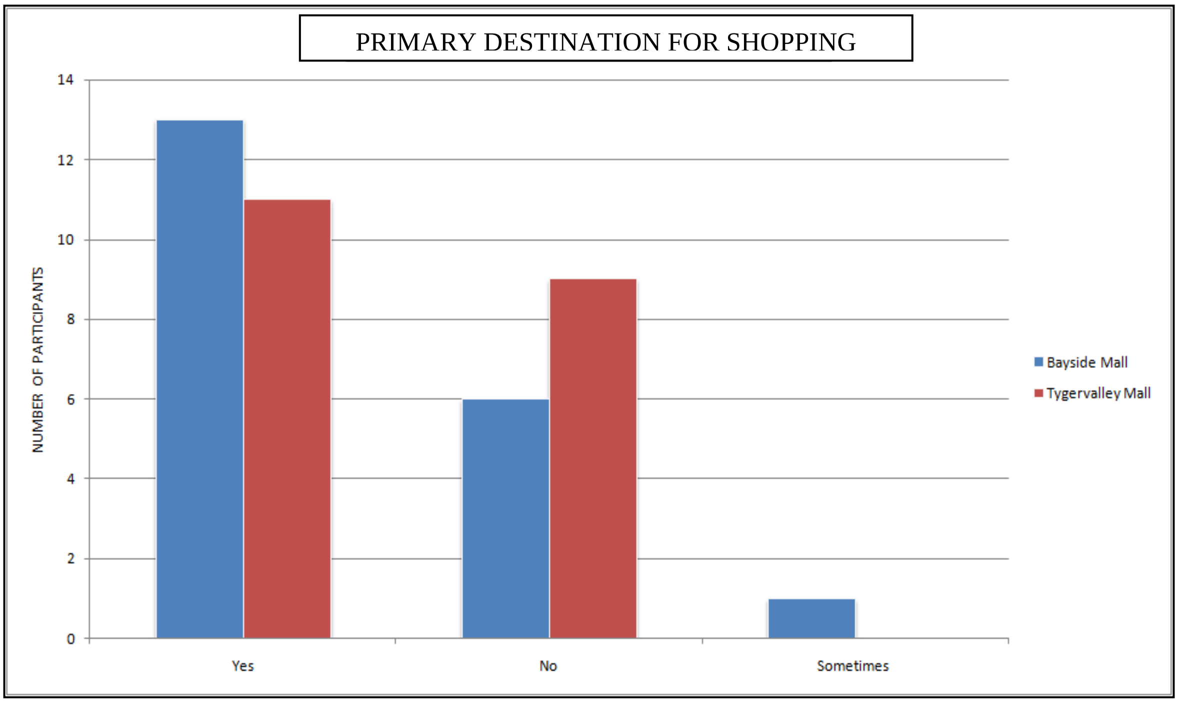

Figure 3.6 Primary destination for shopping

Furthermore, the consumer behaviour model should be taken into consideration. Step four in the model determines the shopping centre and store at which a patron will make a purchase (Hawkins & Mothersbaugh 2013). Majority of patrons at Bayside and Tyger Valley shopping centres did their primary shopping at these destinations (See Figure3.6). These shopping centres were therefore able to satisfy their patrons' preferences and needs and provided a convenient and positive shopping experience. Patrons at Bayside shopping centre who did not do their primary shopping in the centre came from surrounding areas. They preferred to do their primary shopping closer to where they lived however frequented Bayside shopping centre because of special offerings such as "Dischem" and the "cinema." Furthermore, some patrons who resided close to the shopping centre preferred to do their primary shopping at smaller convenient retail outlets such as Pick and Pay. A patron classified under the sometimes category stated that she occasionally did her "primary shopping at the shopping centre" but it was depended on which area she was at the time. Patrons at Tyger Valley shopping centre who indicated they do not do they their primary shopping in the centre are also the patrons who frequented the shopping centre less than five times per month. Interestingly two patrons stated that they preferred online shopping over visiting the shopping centre.

3.15 PATRON PERCEPTIONS: ALTERNATIVE SHOPPING DESTINATIONS

This section explored what alternative shopping centres patrons preferred. Patrons at Bayside and Tyger Valley shopping centres who indicated "none" had no other preferences and preferred to frequent the respective shopping centres (See Figure 3.7). Table 3.3 indicate the different shopping centres that patrons also frequented.

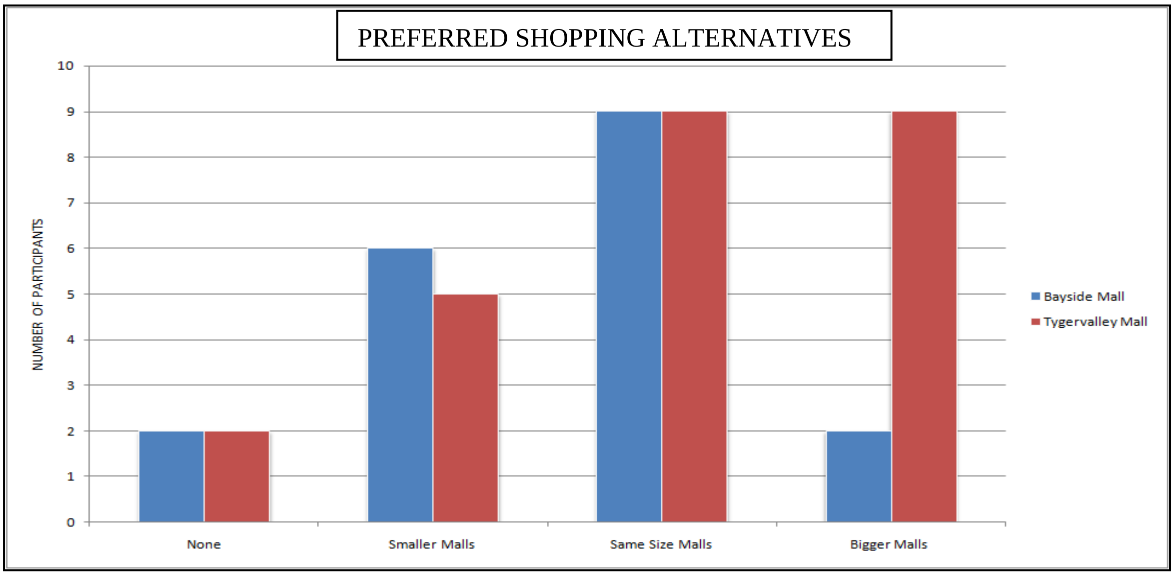

Figure 3.7 Preferred shopping alternatives

Table 3.3 Alternative shopping destinations

BAYSIDE CENTRE PATRONS		TYGER VALLEY CENTRE PATRONS	
Smaller shopping centres	PNP & SPAR Outlets Khayelitsha shopping centre The Paddocks West Coast Village Gugulethu Square Access Park Bellville	Smaller shopping centres	Glengarry Willowbridge shopping centre
Same size shopping centres	Table Bay shopping centre Liberty Promenade Somerset West shopping centre	Same size shopping centres	Bayside shopping centre Cape Gate shopping centre Cavendish Square
Bigger shopping centres	Canal Walk	Bigger shopping centres	Canal Walk V&A Waterfront

3.16 PATRON PERCEPTIONS: PLANNED OR UNPLANNED PURCHASE?

An impulsive purchase is defined as a transaction that was not planned. It occurs when a consumer experience a heightened emotion over a particular item. This results in a purchase where a limited thought process took place (Gamage *et al* 2008). Conversely, the planned purchasing process is underpinned by consumer behaviour and decision model. A consumer who purchases an item immediately becomes aware of a need that was not satisfied, however, the consumer may not realise it at the point of purchase. (Strydom *et al* 2000).

External stimulants are implemented by marketing management and stores to influence consumers purchasing behaviour (Youn & Faber 2000). These stimulants are found in stores and the general shopping environment. Marketing managers and store owners alike position stimuli to entice a consumer. A consumer will therefore be tempted to make an impulsive purchase when exposed to graphic stimulus in the retail environment (Piron 1991). Figure 3.8 illustrates that the majority of patrons at Bayside and Tyger Valley shopping centres tended to spend more than what they initially planned.

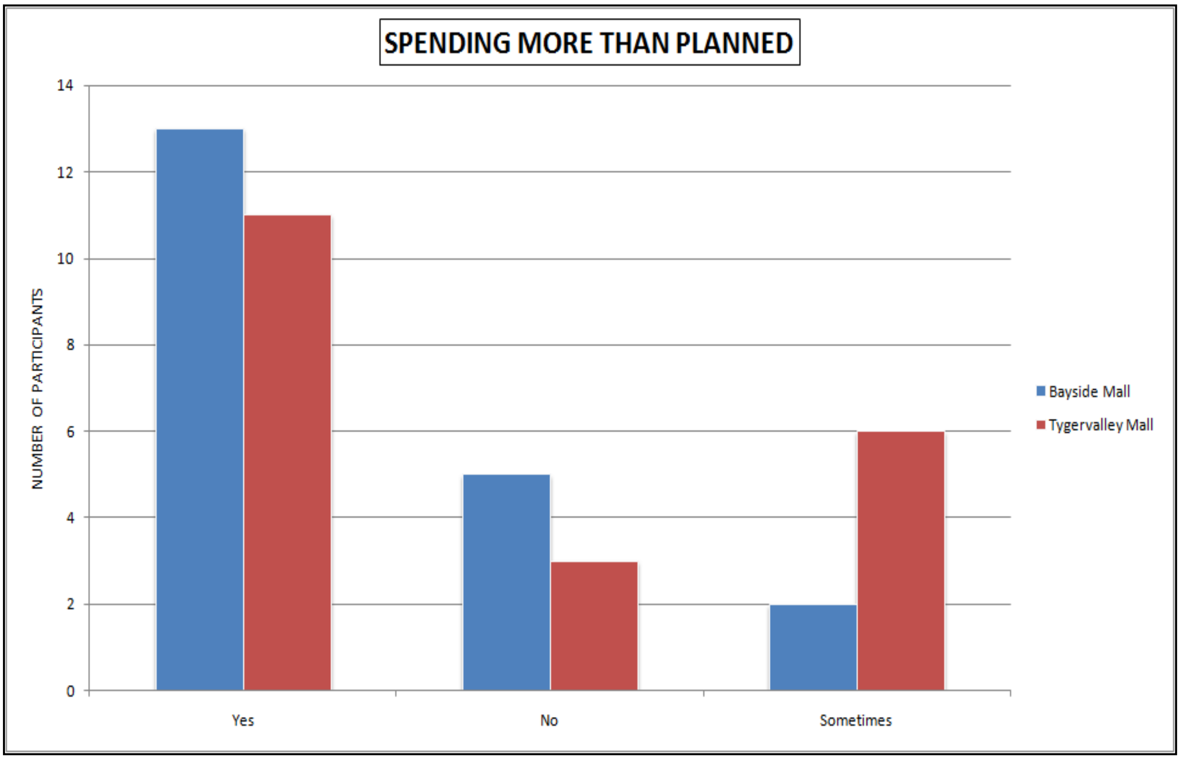

Figure 3.8 Spending more than planned

A patron at Bayside shopping centre indicated she usually spent more when there were "specials at Checkers and Clicks" whilst another patron stated it happened whenever there were "specials." Conversely, a patron who did not spend more than planned for was because he followed a strict "budget."Similarly, a patron at Tyger Valley shopping centre who usually spent more than planned for stated it occurred when there were "specials." Many patrons who fell within the sometimes category also stated it "sometimes, when there" were "specials."One respondent who enjoyed visiting the cinema said he sometimes spent "on snacks" that he did not financially plan for.

3.17 PATRON PERCEPTIONS: PREFERRED VISITATION PERIODS

Whether it is a day of the week or a specific time of the month, patron visitation to a shopping centre is a subjective process that differs from person to person. Under the same retail environment, two individuals may view the same physical cue differently. One may think it is just the right time while the other might perceive it to be overcrowded (Wakefield & Baker 2011). Human density is influential on factors such as the store environment and ambience that forms part of the overall shopping experience (Ferreira *et al* 2017). High human density usually results in high stimulus and negative responses such as avoidance or leaving a store. However, it also has positive effects on people. For instance, when patrons seek a high level of intimacy they prefer to visit high-density shopping environments (Wakefield & Baker 2011). Patrons at Bayside and Tyger Valley shopping centres were selective of the days and times when they preferred to visit the shopping centres (See Figure 3.9). Patrons at Bayside shopping centre generally preferred to visit at periods when there were few people to avoid crowds and queues. One Patron stated she visited in the "mornings" when it was "quiet" while another patron visited "in the mornings, or just before" the shopping centre closed "to avoid queues." Other patrons indicated they preferred the "middle of the month when it is not full" and around the "23rd – 25th" just before the shopping centre became busy.

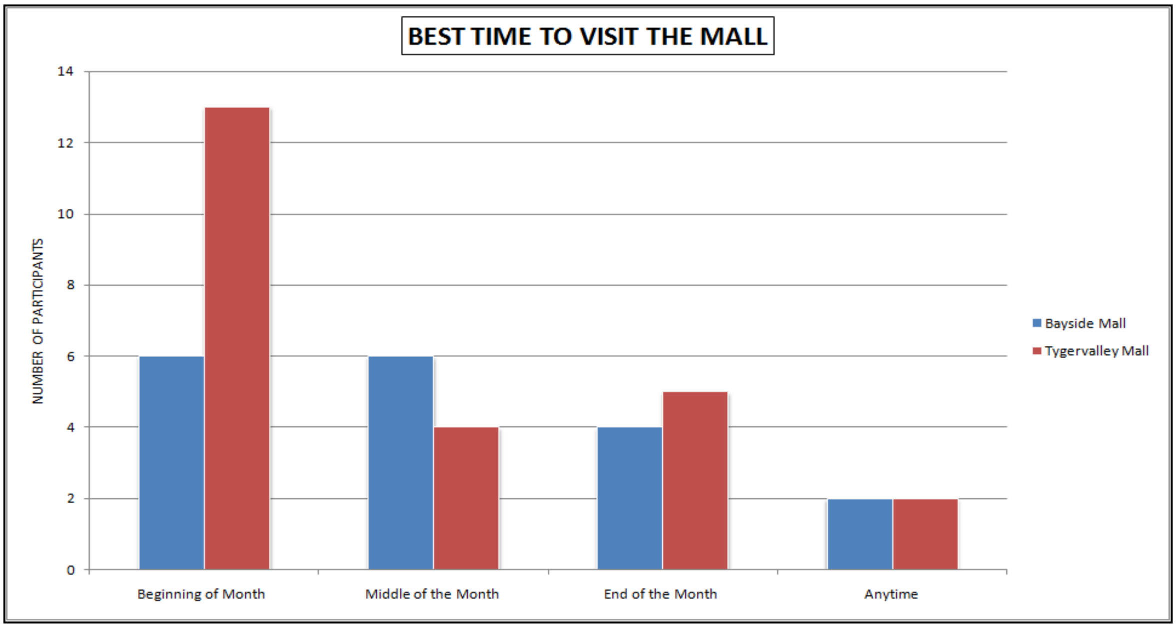

Figure: 3.9 Best time to visit the shopping centre

Conversely, a small per cent of patrons enjoyed a high human density environment, While others visited the shopping centre when they received their salaries. A patron particularly enjoyed visiting on “Saturdays” when it was “nice and full.” Another patron visited “month-end” when she received her salary and was able to do “grocery shopping.”Patrons who visited any time of the day or month lived close to the shopping centre. These patrons did not have a specific preference as to a particular time or day. Similarly, a large per cent of patrons at Tyger Valley shopping centre preferred to visit on quiet days to avoid crowds and queues. For instance, one patron said he preferred “mid-mornings” as there were “fewer people with lots of parking space” while another patron stated she preferred to visit the shopping centre when there were “no queues and less people.”

Patrons who mainly visited over weekends and the busier month-end periods were also the patrons who visited the shopping centre for social reasons. Also, some patrons were only able to visit the shopping centre when they had the available time. One patron indicated he preferred “weekends” when he was “free.” Generally, the patrons who were able to visit the shopping centre at any-time did not specify a preference and also lived close to the shopping centre.

3.18 PATRON PERCEPTIONS: SATISFACTION LEVELS

Satisfaction is vital as a great shopping experience means that a happy patron will spend more and frequent the shopping centre often. Patron satisfaction includes several aspects such as the choice of stores, good patron services, safety and security, cleanliness, a pleasant atmosphere as well as catering (Latimer Appleby 2014). A large per cent of patrons at Bayside and Tyger Valley shopping centres expressed they were satisfied with their overall shopping experiences (See Figure 3.10). Patrons at Bayside shopping centre felt the tenant mix should improve. One respondent said there is no “Pep” while another patron stated, “they should add more stores.” In terms of patron services at Bayside shopping centre, a patron stated that “customer services can improve.” Two patrons at Bayside shopping centre were concerned with the presence of taxi operators in the parking bay area. They did not feel “safe” around the area especially at surging times of taxi violence. In terms of ease of access at Bayside shopping centre, a respondent from out of town stated: “the entrances are challenging, as not everyone knows how to use circles.” While another patron said the “distance between shops” was a problem as he “had to do more walking.”

Figure 3.10 Aspects that affected patrons shopping experience

Similarly, a patron at Tyger Valley shopping centre felt dissatisfied with an experience as “the staff did not greet” and they were “customer friendly” as she “was not offered a packet.” Furthermore, a respondent noted the centre could improve on cleanliness. She stated that “cleanliness of the toilets could improve” and “they should add more toilets.” While another patron stated that she disliked “when the merchandise” was” out of stock” and the “parking area” was “full.” Patrons at Tyger Valley shopping centre generally indicated they did not enjoy the environment when it was “full”, “crowded” and when there were “queues.”

CHAPTER 4: CONCLUSION

The introduction of the shopping centre was widely embraced by American consumers and retailers. Its growth was a result of suburban residential development, private automobile ownership and a series of policies that promoted shopping centre development. It offered an alternative shopping experience to that of the downtown retail markets. Consumers no longer had to brave various weather conditions and could enjoy, amongst other advantages, the comfort of an air-conditioned shopping environment. To date, the market for shopping centres has matured and only a hand full is constructed at any one time. Shopping centre developments are hindered by the difficulty of land acquisition, the challenges of public approvals, retail competition as well as consumer shopping preferences and change demographics. In response to the aforementioned challenges and changes, the various role players in shopping centre developments have shifted their focus from construction to rehabilitation, intensification and repositioning the shopping centre in the United States.

With little impact from online competition South African retailers are placing most of their efforts into the traditional brick and mortar stores. Online operations are generally expensive to maintain and often not profitable. According to a Visa survey, 63% of South Africans preferred to make purchases at a shopping centre whilst 76% visit a centre at least once a week (Accenture 2019). The purpose of the study was to determine the factors that influence patronage and spending patterns at Bayside and Tyger Valley shopping centres. It also sought to determine what motivated patronage and spend at these shopping centres. Patronage remains at the core of shopping centre viability. Therefore the lack in understanding patrons' needs and preferences could ultimately reduce patronage and spend at a given shopping centre.

The results of the study highlighted many interesting findings that corresponded with the literature review. Shopping centre patronage is not guaranteed nor regarded as a random phenomenon. It is a concerted effort between centre management and various retailers that entailed on-going research to understand their consumer base and to provide appropriate offerings as well as to design effective marketing strategies. The aspects of location and tenant mix were regarded as the two main contributing factors that attracted patronage to the shopping centres. A convenient location acts as an incentive for both centre management and tenants. Location of shopping centres should be visible and accessible from major road intersections.

The Bayside and Tyger Valley shopping centres are located along busy transport routes and also supported by public transport modes such as the MyCiti, Golden Arrow and minibus taxi services. Public transport is important in the South African context however safety concerns were highlighted, especially during taxi violence episodes. The shopping centres are also closely located to surrounding businesses from which patronage is attracted. Another important driver of patronage and spend at the shopping centres was a well-balanced tenant mix. The arrangement of stores, their presentations and well position promotions encouraged patronage. The balance between implementing an appropriate tenant mix together with the understanding of their consumer markets has resulted in a satisfied patron base and patron loyalty. Patrons who expressed dissatisfaction were related to the absence of certain retailers in the shopping centres.

The marketing strategies implemented by centre management of the shopping centres also contributed to an increase in foot count and sales in the various stores. One marketing strategy incorporated a relationship approach to developing a strong emotional connection and a loyal patron base. Another marketing strategy used a mixed approach with the outcome to bolster sales turn over upon patronage and at planned events. Although the majority of tenants agreed the marketing efforts assisted in sales turn over, some tenants felt centre management could do more. It is widely agreed that the shopping centre has been a place for both commercial and social activities. Patrons were also motivated to visit the shopping centres for recreational and entertainment amenities. It offered a high sensory environment to patrons who were bored and also functioned as an ideal place to meet up with friends and colleagues. Patrons also visited the shopping centres because of the cinema or to watch sporting events. A Shopping centre that can satisfy a patron’s social needs is more desirable than a shopping centre that does not. Furthermore, aspects that created a poor shopping experience were explored. Some findings indicated that factors such as cleanliness, poor customer relations and a lack of facilities can create a negative retail image of a store or shopping centre. Although a large per cent of patrons were satisfied with their shopping experiences, for others who were dissatisfied resulted in the abandonment of sales.

4.1 LIMITATIONS OF THE STUDY

A major limitation experienced during the study was acquiring primary sources of information. Some of the information was classified as highly confidential and therefore was not made readily available. Another limitation was the sample size of the rapid appraisals. Due to centre managements restrictions, the anticipated sample sizes of rapid appraisals and interviews with different retailers were dramatically reduced.

4.2 RECOMMENDATIONS FOR FUTURE RESEARCH

Shopping centre management and retailers constantly have to understand the ever-changing behaviour of a consumer. It would be interesting to observe how the South African shopping centre is preparing and evolving to remain relevant in the approach of the fourth industrial revolution.

REFERENCES

Accenture 2019. Rethinking the ecommerce opportunity in South Africa. How retailers can pivot to digital customers. [Online]. Available from: https://www.readkong.com/page/rethinking-the-ecommerce-opportunity-in-south-africa-8383683 [Accessed on 02 November 2020].

Affirmative portfolios n.d. The affect of strike on businesses and employees. [online] available from: https://www.affirmativeportfolios.co.za/the-affects-of-strikes-on-businesses-and-employees/ [Accessed 15 November 2019].

Architecture & Builder 2000. Canal Walk shopping centre at Century City. [Online]. Available from: http://www.solutionstation.co.za/downloads/canalwalk_article.pdf [Accessed on 02 November 2020].

Abaza M 2006. Egyptianizing the American Dream: Nasr City's Shopping Malls, Public Order, and the Privatized Military. In Singerman D, Amar P (eds) *Cairo Cosmopolitan: Politics, Culture, and Urban Space in the New Globalized Middle East.* New York: The American University in Cairo Press.

Ahmed Z U, Ghingold M, Dahari Z 2007. Malaysian mall behaviour: an exploratory study. *Asia Pacific Journal of Marketing and Logistics* 19: 331–348.

Al-Mahy J A M 2013. The modern retail habitat in the Gulf Region: the experience of Bahraini shopper. *International Journal of Business Management* 81: 161–174.

Anning-Dorson T, Kastner A, Mahmoud M A 2013. Investigation into mall visitation motivation and demographic idiosyncrasies in Ghana. *Management Science Letters* 3:367–384.

Bailey M 2015. Written testimony, oral history and retail environments: Australian shopping centres in the 1960s. *Journal of historical research in Marketing*. 7: 956-372.

Barnes A 2002. Shopping centres – more than just a mix of tenants. *Shopping South Africa* 1:11.

Bayside mall n.d. Contact us [Online]. Available from: https://www.baysidemall.co.za/contact-us.htm [Accessed 25 October 2019].

BDP planning and Oxford institute of retail management 1992. The effects of major out-of-town retail development: a literature review for the department of the environment London: HMSO.

Berman V & Evans J R 2013. *Retail Management: A Strategic Approach*. 12th ed. Boston: Pearson

Beyard M D, Corrigan M B, Kramer A, Pawlukiewicz M, Bach A 2006. *Ten principles of rethinking the mall*. Washington DC: Urban Land Institute.

Blaszczyk R 2009. *American Consumer Society, 1865-2005: From Hearth to HDTV*. Michigan: Wiley.

Bromley R D F, Thomas CF J 1995. Small town shopping centre decline: Dependence and Inconvenience for the disadvantaged. *International Review of Retail Distribution and Consumer Research* 5: 433-456.

Brytenbach A 2014. Black Consumers' shopping patronage and perceptions of the Riverside Mall's attractiveness. Dissertation. Pretoria. University of Pretoria, Department of Economic and Management Sciences.

Burgess S 2003. Within-country diversity: is it the key to South Africa's prosperity in a changing world? *International Journal of Advertising* 22: 157-82.

Business Line 2007. Mall construction set to boom says Merrill Lynch study [Online] Available from: www.thehindubusinessline.com/2005/06/10/stories/2005061001091700.htm [Accessed on 20 October 2020].

Buttle F 1996. *Relationship marketing theory and practice.* London: Paul Chapman Publishing LTD.

Campanella T 2008. *The Concrete Dragon: China's Urban Revolution and What it Means for the World*. New York: Princeton Architectural Pres

Chebat J C, Chebat C G & Therrien K 2005. Lost in the mall, the effects of gender, familiarity with mall and shopping values on shoppers' way finding process. *Journal of Business Research* 58: 1590-1598.

Choo J H, Jung I H, Yun J S 2015. Consumer experiences in fitting rooms in SPA stores. *Fashion and Textiles stores* 2:1.

Cloete C E, Hedhli K E & Sirgy M J 2009. How does shopper-based mall equity generate mall loyalty? A conceptual model and empirical evidence. *Journal of Retailing and Consumer Services* 16: 50-60.

Cloete C E, Skinner G 2010. *Shopping centre management in South Africa*. 4th ed. Sandton: South African Council of Shopping Centres.

Cohen L 1996. From town center to shopping center: The reconfiguration of community marketplaces in postwar America. *American Historical Review* 101: 1050-1081.

Cohen L 2003. *A Consumers' Republic: The Politics of Mass Consumption in Postwar America.* New York: Random House.

Dardagan G 2005. Hey, big black spender: consumer confidence and equity a profitable mix. Daily news, 20 April. [Online] Available from: www.unileverinstitute.co.za [Accessed 03 August 2019].

Darren B, Clemmensen N J, Mikael B S 2009. Supporting the supermarket shopping experience through a context-aware shopping trolley (no further info)

D'Astous A 2000. Irritating of the shopping environment. *Journal of Business Research* 49 2:149-156.

Davila A 2012. *Culture Works: Space, Value and Mobility across the Neoliberal Americas.* New York: New York University Press.

Dawson J A 1983. *Shopping Development*. New York: Longman.

De Meyer C F, Petzer D J 2013. Trials and tribulations: Marketing in modern South Africa. *European Business Review* 4: 382-390.

Department of Environment (1997). *Development control policy Note 13: Large New stores.* London: HMSO.

Dhurup M 2008. A generic taxonomy of shopping motives among hypermarkets (hyper-stores) customers and the relationship with demographic variables. *Acta Commercii* 8: 64-79.

Dolga L, Palvis M, Singleton A 2015. Estimating attractiveness, hierarchy and catchment area extents for a national set of retail centre agglomerations. *Journal of retailing and consumer services* 28: 78-90.

Dowling R, Getz D 2001. Wine tourism futures. In Faulkner B, Mosgardo G & Laws E (eds) *Tourism in the 21st century: Lessons from experience,* 49-66. London: Continuum.

Economy 2010. [Online] Missing URL. [Accessed on 15 November 2019].

El-Adly M I 2007. Malls attractiveness: a segmentation approach. *International of Retail and Distribution Management* 35 11: 936-950.

El Hedhli K, Chebat J C, Sirgy M J 2013. Shopping well-being at the mall: construct, antecedents, and consequences. *Journal of Business Research* 66:856–863.

Engel J F, Blackwell R D 1982. *Consumer Behaviour*. New York: Dryden Press.

Evers D 2006. Building for consumption: An institutional analysis of peripheral centre development in Northwest Europe. Dissertation. Amersterdam: University of Amsterdam, Faculty of Social and Behavioural Sciences.

Farrell J J 2003. *One Nation Under Goods: Malls and the Seductions of American Shopping.* Washington DC: Simthsonian Books.

Ferreira M C O, Brandao M M, Bizarrias F S 2017. Understanding consumer's responses to negative emotions related to crowding on satisfaction and impulse purchases in retail: the mediating role of coping. *Revista de Administracao* 52: 431-442.

Finn A, Louviere J J 1996. Shopping center image, consideration, and choice: Anchor store contribution. *Journal of Business Research* 35: 241-251.

Fisher J, Lentz G 1990. Business enterprise value in malls: An empirical test. *Journal of Real Estate Research* 5: 167 -175.

Frasquet M, Gil I, Molla A 2001. A Shopping selection modelling: a segmentation approach. The *International Review of Retail, Distribution and Consumer Research* 11: 23-38.

Gamage D N W, Wickramasingha Y M, Henegedara G M 2008. Factors influencing impulse buying behaviour of rural people. *Research and Training Institute* 1: 1-2.

Ganguli J, Kuruvilla S J 2008. Mall development and operations: An Indian perspective. *Journal of Retail and Leisure Property* 7: 204-215.

Gosseye J 2015. Milton Keynes Centre: the apotheosis of the British post-war consensus or the apostle of neo-liberalism? *History of Retailing and Consumption* 1: 209-29.

Green W 2001. *The retail store: design and construction*. 2nd ed. Lincoln: iUniverse.com, Inc.

Grewal Dhruv, Roggeveen A, Runyan R 2013. Retailing in a Connected World. *Journal of Marketing Management* 29: 263-270.

Growth Point Properties 2015. Integrated Annual Report. [Online]. Available from: http://www.growthpoint-reports.co.za/annual-report-2015/sec-retail.php [Accessed on 25 October 2020].

Gupta S, Randhawa G 2008. *Retail Management*. New Delhi: Atlantic Publishers & Distributors (P) LTD.

Guy C 1994. Whatever happened to regional shopping centres? *Geography* 79: 293-312.

Hanchett T W 1996. U.S. Tax Policy and the Shopping-Center Boom of the 1950s and 1960s. *The American Historical Review* 101: 1082-1110.

Hardwick M J 200. *Mall Maker: Victor Gruen, Architect of an American Dream.* Philadelphia: University of Pennsylvania Press.

Harmse C 2014. Service quality in a landlord-small business relationship in shopping centres. *Problems and perspective management* 12: 67-64.

Hartnardy P 2010. Quality customer service. In Cloete C E (eds). *Shopping Centre Management in South Africa*. 4th ed. Sandton: Shopping Centre Council of South Africa.

Hawkins D I, Mothersbaugh D L, Best R J 2007. *Consumer Behaviour: Building marketing strategy*. 10th ed. New York: McGraw-Hill/Irwin.

Hawkins D I, Mothersbaugh D L 2013. *Consumer behaviour: building marketing strategy*. 12thed. New York: McGraw-Hill/Irwin

Hedley N 2003. Atterbury to develop largest mall in Namibia. [Online]. Available from: Hhttp://www.bdlive.co.za/business/property/2013/02/26 [Accessed 19 October 2020].

Hendrick M O 2008. Two Asian malls: urban shopping centre development in Singapore and Japan. *Asia Pacific Business Review* 15: 123-135.

Hopkins J S P 1990. West Edmonton mall: Landscapes of myths and elsewhere. *The Canadian geographer* 1:2-17.

Howard G 1985. The evolution of the planned shopping centre in the suburb and city. *Journal of the American Planning Association* 51: 449-460.

Howard V 2015. *From Main Street to Mall: The Rise and Fall of the American Department store*. Philadelphia: University of Pennsylvania Press.

Howard V, Stobart J 2018 (Submitted/In press). Arcades, shopping centres and shopping malls. 10.4324/9781315560854-12.

Hsieh H F, Shannon S E 2005. Three Approaches to Qualitative Content Analysis. *Qualitative Health Research* 15: 1277-1288.

Hugo-Burrows R 2004. Current trends and future challenges in the South African advertising industry—an introductory review. *Journal of African Business* 5: 39-52.

Human Sciences Research Council 2007. Families and households in post-apartheid South Africa: Socio-demographic perspectives. [Online]. Available from: www.hsrc.ac.za/Media_Release-330.phtml [Accessed 16 October 2020].

Ibrahim M F, Sim L L, Chen F S 2003. Positioning of shopping centres within the retail market of Singapore. *Pacific Rim Property Research Journal* 9: 61-78.

Idoko E C, Ukenna S I, Obeta C E 2009. Determinants of shopping mall patronage frequency in a developing economy: Evidence from Nigerian mall shoppers. *Journal of Retailing and Consumer Services* 48: 186-201.

Idoko E C , Nkamnebe A D, Okoye V I 2017. Predictors and characterization of mall shoppers in a typical sub-Saharan African context: evidence from Nigeria. *Indian Journal of Commerce and Management Studies* 8: 1–15.

Irwin R 2003. Corporate social investment and branding in the new South Africa. *Brand Management* 10: 303-11.

Jackson K T 1996. All the World's a Mall: Reflections on the Social and Economic Consequences of the American Shopping Center. *American Historical Review* 101: 1111-1121.

Karande K , Merchant A 2012. The impact of time and planning orientation on an individual's recreational shopper identity and shopping behaviour. *The Journal of Marketing Theory and Practice* 20: 59–72.

Kaufmann C F, Lane P M 1996. A new look at one-stop shopping: a TIMES model approach to matching store hours and shopper schedules. *Journal of Consumer Marketing* 13:4–25.

Kim Y K 2002. Consumer value: an application to mall and internet shopping. *International Journal of Retail and Distribution management* 30: 595-602.

Kirkup M H, Rafiq M 2010. Marketing shopping centres: challenges in the UK context. *Journal of marketing practice: applied marketing science* 5: 119-133.

Krugel 2010. What is essential for a shopping centre to be a success. Honours Paper. Pretoria. University of Pretoria, Faculty of Engineering, Built Environment and Information Technology.

Kruger A 2019. This is how Eskom throttles the economy. [Online]. Available from: https://www.moneyweb.co.za/news/companies-and-deals/this-is-how-eskom-throttles-the-economy/ [Accessed 15 November 2019].

Kumar K 1993. Rapid Appraisal Methods. *World Bank Regional and Sectoral*. Washington, DC: World Bank.

Lavrakas P J 2008. *Encyclopaedia of Survey Research Methods*. California: Sage Publications.

Latimer Appleby Marketing Research Consultants 2014. Shopping centre market research; measuring what matters. [No further Information].

Lawrence M 2012. External influences in consumer behaviour. [Online]. Available from: http://www.slideshare.net/MathewLawrence/consumer-behaviour-external-factors [Accessed 22 September 2019].

Levy M, Weitz B A 2013. *Retailing Management*. New York: McGraw Hill.

Linder A 2016. Five years from now, one-third of China's shopping malls will be out of business, report says. [Online]. Available from: http://shanghaiist.com/2016/09/08/one_third_shopping_malls_gone.php [Accessed on 19 October 2020].

Longstreth R 2010. *The American Department Store Transformed, 1920-1960*. New Haven: Yale University Press.

Lusch R F, Dunne P M, Carver J R 2011. *Introduction to Retailing*. 7th ed. Mason- Ohio: South Western Cengage Learning.

Ma H 2000. Competitive advantage and firm performance. *Competitiveness Review* 10:15-32

Market Tree Consultancy 2008. Black diamonds and the emerging black middle class in South Africa. [Online]. Available from: http://www.markettree.co.za [accessed 03 August 2019].

Martineau P 1958. The personality of the retail store. *Harvard Business Review* 36: 47-55.

Mbombela Local Municipality 2011. [Online]. Available from: http://www.mbombela.gov.za [Accessed 27 August 2019].

Mckinsey Global Institute (MGI) 2007 . The Bird of Gold: The Rise of the Indian consumer Market [Online]. Available from:

www.mckinsey.com/mgi/publications/India_consumer_market/index.asp [Accessed 22 October 2020].

Meyer-Ohle H 2009. Two Asian malls: urban shopping centre development in Singapore and Japan. *Asia Specific Business Review*15: 123-135.

Minter A 2016. China's Empty Malls Get Weirder [Online]. Available from: https://www.bloomberg.com/view/articles/2016-02-17/china-s-empty-malls-get-weirder [Accessed 19 October 2020].

Mokubela L 2018. Township retail and shopping centre market growing at rapid pace. [Online]. Available from: http://www.fastmoving.co.za/news/retailer-news-16/township-retail-and-shopping-centre-market-growing-at-a-rapid-pace-11935. [Accessed 31-08-19].

Morrison K 2003. *English Shops and Shopping*. New Haven, CT/London: Yale University Press.

Moscove B J, Fletcher R G 2001. The new century: lessons learned from Singapore's shopping sector during the 1990s. *The annals of regional science* 35: 501–522.

Mouton J 2011. *How to succeed in your masters and doctoral studies. A South African guide and resource book*. Pretoria: Van Schaik Publishers

Mowana Properties 2020. Property Overview [Online]. Available from: https://mowanaproperties.co.za/properties/tyger-valley-shopping-centre/ [Accessed 25 October 2020].

MyCiti Business Plan 2012. [Online]. Available from: https://www.myciti.org.za/docs/categories/1606/Complete_MyCiTi_Business_Plan_2012.pdf. [Accessed 13 October 2019].

Nel E L, Binns, T 2002. Evaluating local economic development initiatives in South Africa: evidence from the Cities. Unpublished paper delivered at the Africa Studies Association Conference, Birmingham, UK.

Nicolaide B, Andrew W A (eds) 2006. *The Suburb Reader*. New York: Routledge.

Nigeria Population Commission 2006. Report on census 2006 final results. [No further information].

North E J, Kotze T G 2004. Customer perceptions of the attractiveness of shopping centres in Pretoria. *Southern African Business Review* 8: 30-38.

Olivier D 2007. South Africa poised to become a loyalty marketing gem. *Journal of Consumer Marketing* 24:180-1.

Piron F 1991. Defining impulse purchasing. *Advances in Consumer Research* 18: 509-514.

Price D, Cloete C E 2010. Presentation and Display. In Cloete C E (eds). *Shopping Centre Management in South Africa.* 4th ed. Sandton: Shopping Centre Council of South Africa.

Prinsloo D 2006. Past and future changes in shopping patterns, behaviour and shopping centre development. [Online]. available from: www.urbanstudies.co.za/mar-future06.html [Accessed 16 August 2019].

Prinsloo D A 2008. Research conducted in 200 of South Africa's shopping s. *Urban Studies.* [Online]. Available from: http://www.urbanstudies.co.za/publications_Research%20conducted20%in20200%20sa%shopping%20s.html [Accessed 19 August 2019].

Prinsloo D A 2010a. Urban studies; classification and hierarchy of retail facilities in South Africa. [Online]. Available from: http://urbanstudies.co.za/wp-content/uploads/2016/07/New-Retail-Classification-20101.pdf [Accessed on 19 August 2019].

Prinsloo D A 2010b. Classification and hierarchy of retail facilities in South Africa. [Online]. *Research Reports* 2:2010 [Missing URL].

Prinsloo D A 2013a. Where are we coming from and where are we going? [Online]. Available-from: http://www.urbanstudies.co.za/Publications_South%20African%20shopping%20%20addition.html [Accessed on 19 August 2019].

Prinsloo D A 2013b. Benchmarking South African shopping industry: we are doing extremely well! [Online]. Available from: http:/www.urbanstudies.co.za/pdf%27s/ICSC%20Research%20Report%20%20Bench [Accessed on 19 August 2019].

Prinsloo D A 2016. Major retail types, Classification and the hierarchy of retail facilities in South Africa. Urban Studies. [Online]. Available from: http://urbanstudies.co.za/wp-content/uploads/2016/11/Classification-2016.pdf [Accessed on 19 August 2019].

Prinsloo D A 2018. SA Shopping Benchmark 1988 – 2018. A trillion rand and fierce competition. Urban studies. [Online]. Available from: https://www.urbanstudies.co.za/wp-content/uploads/2018/05/Urban-Studies-report-Shopping-Centre-benchmarks2.pdf [Accessed on 19 August 2019].

Raworth k, Hopkins A, Narayan S, Magrath J, Sweetman C, Raworth k, Rowlands J, Walsh M 2012. Conducting semi-structured interviews. Oxford GB [no further information].

Report of the Select Committee on Small Business United States Senate 1960. *Impact of Suburban Shopping Centers on Independent Retailers*. 86th Congress 1st Session. Report No. 1016.

Richey R G, Reynolds K E, Beitelspacher L S 2011. Exploring new perspectives on service efficiency: service culture in retail organisations. *Journal of service marketing* 25: 215-228.

Roger S C 2001. *Marketing strategies, tactics and techniques. A handbook for practioners*. Connecticut: Greenwood Publishing Group.

Rogerson C, Rogerson J 1997. The changing post-apartheid city: emergent black-owned small enterprises in Johannesburg. *Urban Studies* 34: 85-103.

Roy A 1994. Correlates of mall visit frequency. *Journal of Retailing* 70: 139-161.

Ruiz J P, Chebat J C, Hansen P 2004. Another trip to the mall: a segmentation study of consumers based on their activities. *Journal of Retailing and Consumer Services* 11: 333-350.

SA commercial Prop News 2012. R800-million sparkle for Zimbabwe's new mall. [Online] Available from http://www.sacommercialpropertynews.co.za [accessed 27-08-19]

SACSC 2010. *Southern African shopping centre directory*. Sandton: South African Council of Shopping Centres.

Sandon city. n.d. History of the centre. [Online]. Available from: http://www.sandtoncity.com/libproperties/content/en/sandton-city/sandton-city-history-of-the-centre [accessed 25 August 2019].

SAPAO 2018 . Research retail trends report. Sandton: South African Property Owners Association. [No further Information].

Schiffman L, O'Cass A, Paladino A, Carlson J 2013. *Consumer behaviour*. 6th ed. French's Forest -NSW: Pearson Australia.

Seidman S 1994. *Contested Knowledge*. West Sussex: Wiley- Blackwell.

Severin 2001. Sources of patron satisfaction with malls: A comparative study of different patron segments [No further information].

Sherman L 2008. The World’s Best Shopping Malls. *Forbes* August 1.

Singh S 2005. Surviving competitive times [Online]. Available from: www.timesofi ndia.indiatimes.com/articleshow/1048820.cms [Accessed on 21 October 2020].

Sit J, Merrilees B, Birch D 2003. Entertainment – seeking shopping patrons: the missing segments. *International Journal of Retail and Distribution Management* 31: 80-94.

Snyders V, CLoete C 2010. Tenant mix, In Cloete C E (eds) *Shopping Centre Management in South Africa*. 4th ed. Sandton: South African Council of Shopping Centres.

Spector R 2005. *Category Killers: The Retail Revolution and Its Impact on Consumer Culture.* Boston: Harvard Business School Press

Spielvogel C 1956. Shopper's Dream Near Completion. *New York Times* September 24: 38

Srivastava S 2015. *Entangled Urbanism: Slum, Gated Community, and Shopping Mall in Delhi and Gurgao.* Oxford: Oxford University Press.

Stayn J B 2010. SA winkel sentrum is enorm: tog is hulle maar net sardyne tussen n see vol walvisse. Sake Rapport, 17 Januarie.

Stobart J 2008. *Spend, Spend, Spend: a History of Shopping*. London: History Press.

Strydom J W, Cant M C, Jooste C J 2000. *Marketing management*. 4th ed. Cape Town: Juta.

Sullivan M, Adcock D 2002. *Retail Marketing*. London: Thomas

TAGG G 2006. Franchising: The Cornerstone for Shopping Centres and the Retail Industry, Johannesburg: South African Council of Shopping Centres.

Tarver J D 1957. Suburbanization of Retail Trade in the Standard Metropolitan Areas of the United States 1948-54. *American Sociological Review*, 22

Tauber E M 1972. Why do people shop? *American Marketing Association* 36: 46–49.

Tauber E M 1995. Why do people shop? Retailers need to refine their role in the market place. *Marketing Management* 4: 58-60.

Teller C & Reutterer T 2008. The evolving concept of retail attractiveness: what makes retail agglomerations attractive when patrons shop at them? *Journal of Retailing and Consumer Services* 15:127-43.

Teller C, Elms J 2010. Managing the attractiveness of the evolved and created retail agglomeration formats. *Marketing intelligence and planning* 28: 25-45.

Terblanche N S, Boshoff C 2001. Measuring patron service with some of the controllable elements of the retail experience: An exploratory study. *South African Journal of Business Management* 32 :35-45.

TEST 1989. *Trouble in Store? Retail locational Policy in Britain and Germany*. London: Transport and Environmental Studies [No further information].

Treadwell L 2019. The role of Macro Environment in the retail industry. [Online]. Available from https://smallbusiness.chron.com/role-macro-environment-retail-industry-33419.html [Accessed 15 November 2019].

Tustin D H, Strydom J W 2006. The potential impact of formal retail chains expansion strategies on retail township development in South Africa. *Southern African Business Review* 10: 44-66 .

Tyger Valley 2020. About Tyger Valley [Online]. Available from: https://www.tygervalley.co.za/about-us [Accessed 25 October 2020].

Urban LandMark Institute 2011. The development of retail centres in emerging economic areas. [Online]. Available from: http://www.urbanlandmark.org.za/downloads/retail_in_townships_booklet_2011.pdf [Accessed 19 October 2020].

Van Aard C J 2005. A Class-Based Segmentation Model for South Africa 1998-2008. South *African Journal of Labour Relations* 32: 7-22.

Van Riper T 2008. The world's largest malls: they're springing up in Asia but will they last [Online]. Available from: http/www.forbes.com/2008/01/17/retail-malls-shopping-biz-commerce-cx_tvr_0118,malls.html [Accessed: 2019-08-19].

Wakefield K L, Baker J 1998. Excitement at the mall: determinants and effects on shopping response. *Journal of retailing* 74: 515-539.

Wakefield K L & Baker J 2011. How consumer shopping orientation influences perceived crowding, excitement, and stress at the mall. *Journal of Academy of Science* 40: 791-806.

Web k 2010. *Consumer Behaviour*. 2nd ed. Sydney: McGraw-Hill.

White D R 2004. A Student's Guide to Statistics for Analysis of Cross Tabulations. *World Cultures* 14: 179-193.

Wong G K M, Lu Y, Yuan L L 2001. SCATTR: an instrument for measuring shopping centre attractiveness. *International Journal of Retail and Distribution Management* 29: 76-86.

Yap C 1996. Retailing and the retail space market in Singapore. *International journal of retail and distribution management* 24:17–24.

Young S, Faber R J 2000. Impulse buying: its relation to personality traits and cues. *Advances in Consumer Research* 27:179-185.

Zhuang G, Tsang A, Zhou N, Li F, Nicholls J 2005. Impacts of situational factors on buying decisions in malls. An empirical study with multinational data. *European Journal of Marketing* 40:17–44.

PERSONAL COMMUNICATIONS

Barttram P 2019. Executive Director MSCI, The Vineyard.Cape Town. Interview on 27 September about shopping centres developments in South Africa.

APPENDIX A

TYGER
VALLEI • VALLEY

Cnr Willie van Schoor& Bill Bezuidenhout, Bellville, 7536
P.O. Box 3001, Tyger Valley, 7530
(t) +27 (0)21 914 1822 (f) +27 (0)21 914 1318
info@tygervalley.co.za www.tygervalley.co.za

23 October 2019

Stellenbosch University
Department of Geography and Environmental Studies

ATTENTION: Mr M Esau

E-MAIL: E-MAIL ADDRESS

Dear Moestaqeem,

RE: CONSENT TO CONDUCT RESEARCH AT TYGERVALLEY SHOPPING CENTRE

1. We refer you to the above matter and more specifically the recent correspondence between yourself.
2. The management at Tyger Valley Shopping Centre here by gives you permission to proceed with the said research in line with the questionnaires that you submitted for approval.
3. As agreed you will conduct the **customer/shopper research** at the Café Bagaso eatery as discussed and arranged with the manager Paul Bothma.
4. **Store Owner/Manager interviews:** As suggested at our meeting the following tenants should be approached for survey interviews: [redacted]
5. We look forward to receiving a copy of the research once completed.

Wishing you all the best with your survey.

Kind regards,

[redacted]

It's all about you

APPENDIX B

Research Study

10+

Some content in this message has been blocked because the sender isn't in your Safe senders list. I trust content from [redacted] | Show blocked content

JG [redacted]

Mon 2/24/2020 7:57 AM

To: Esau, M, Mnr [19447175@sun.ac.za]

Cc: [redacted]

CAUTION: This email originated from outside of the University. Do not click links or open attachments unless you recognize the sender and know the content is safe.

Good day Moestaqeem,

Apologies for the delay in responding to you. [redacted] has gone on [redacted] in January, hence we have [redacted] in her place as acting marketing manager.

This email serves to confirm that you met with myself and [redacted] on Wednesday, 23 October 2019 which is when you conducted your interview and permission was granted for you to conduct a survey with tenants and customers.

Please do not hesitate to contact me should you have any further queries.

Kind regards,

[redacted]
Regional Marketing Manager

[redacted]
Stein House, Brandwacht Office Park,
Trumali Street, Stellenbosch, 7600

Think before you print the email. Help us care for our environment.

APPENDIX C

STELLENBOSCHUNIVERSITY
CONSENT TO PARTICIPATE IN RESEARCH

PROJECT TITLE: FACTORS INFLUENCING PATRONAGE AND SPENDING PATTERINGS AT BAYSIDE AND TYGER VALLEY SHOPPING CENTRES

REFERENCE NUMBER: Pending
RESEARCHER: Mr Moestaqeem Esau
ADDRESS: The for Regional Innovation and Urban Innovation and Statistical Exploration (CRUISE), Department of Geography and Environmental Studies, Chamber of mines corner of Merrimam Avenue and Ryneveld, Stellenbosch.
CONTACT NUMBER: 060 382 6587

Dear Respondent

My name is Moestaqeem Esau and I am a Masters student in Urban and Regional Planning at CRUISE at the Department of Geography and Environmental Studies at Stellenbosch University. I would like to invite you to participate in a research project titled: Determining the factors influencing patronage and spending patterns at Bayside and Tyger Valley shopping centres in Cape Town. The study aims to determine the factors that influence patronage and spending patterns at Bayside and Tyger Valley shopping centres.

Please take some time to read the information presented here which will explain the details of this project. You may contact me if you require any further information or clarity on the project. Also, your participation is entirely voluntary and you can decline to participate. If you do not participate in the study, you will not be negatively affected in any way. Also, you may withdraw from the study at any point, even if you agreed to participate.

The study is in the process of being approved by the Humanities Research Ethics Committee (HREC) at Stellenbosch University and will be conducted according to accepted and applicable international ethical guidelines and principles.

The interview will take approximately 1 hour. The information received from the respondents will remain confidential and anonymous and no personal information will be disclosed. The data will be made anonymous by using pseudonyms. Participation is voluntary and respondents may withdraw at any time. The data will be stored on a password-protected computer. Upon request, a copy of the thesis will be made available to any respondents involved in the research.

If you have any questions concerning the research, please contact me on or my supervisor lodene@sun.ac.za or 0210 808 9103

RIGHTS OF RESEARCH RESPONDENTS. You may withdraw your consent at any time and discontinue participation without penalty. You are not waiving any legal claims, rights or remedies because you participate in the research study. If you have questions regarding your rights as a research subject, contact Ms Maléne Fouché [mfouche@sun.ac.za; 021 808 4622] at the Division for Research Development.

Yours Sincerely

Moestaqeem Esau
Principal Investigator

I have read and understand the information provided in the " consent to participate in the research".
□ Yes

I understand that my participation is entirely voluntary and that I am allowed to withdraw at any time.
□ Yes

I understand that the information will remain confidential and anonymous and that no personal information will be made available. I also have the right to request a version of the final thesis at any point.
□ Yes

UNIVERSITEIT•STELLENBOSCH•UNIVERSITY
jou kennisvennoot • your knowledge partner

SEMI-STRUCTURED INTERVIEW QUESTIONNAIRE FOR CENTRE MANAGEMENT

1. What attracts the patronage?

___

2. In your opinion what influences/encourage patronage and spend?

___

3. In your opinion, what discourages patronage and spend?

___

4. What interventions does centre management implement to encourage foot count and spend?

___

5. Which type of stores attracts the most (and the least) patronage and spend? Explain why you think this is the case.

___

6. When is the shopping centre the busiest in terms of patronage and spend?

___

7. Do you plan any events during this time? If yes, what types of events are planned?

___

8. When is the shopping centre least busy in terms of patronage and spend?

___

9. Do you determine foot count? Is it possible that I can please obtain this data (if yes, which process do I have to follow to obtain it)?

___

10. Do you have an idea of the ratio between the number of patrons (i.e. foot counts) versus the number of actual spends?

___

11. What is the average dwell time of a patron?

___

12. How many stores does a patron visit on average?

___

13. What are some of the challenges faced by centre management?

____

14. Has the shopping centre experienced an increase or decrease in annual revenue? Has there been a significant year-on-year change? What factors influence change?

____

APPENDIX D

UNIVERSITEIT•STELLENBOSCH•UNIVERSITY
jou kennisvennoot • your knowledge partner

STELLENBOSCHUNIVERSITY
CONSENT TO PARTICIPATE IN RESEARCH

PROJECT TITLE: FACTORS INFLUENCING PATRONAGE AND SPENDING PATTERINGS AT BAYSIDE AND TYGER VALLEY SHOPPING CENTRES

REFERENCE NUMBER: Pending
RESEARCHER: Mr Moestaqeem Esau
ADDRESS: The for Regional Innovation and Urban Innovation and Statistical Exploration (CRUISE), Department of Geography and Environmental Studies, Chamber of mines corner of Merrimam Avenue and Ryneveld, Stellenbosch.
CONTACT NUMBER: 060 382 6587

Dear Respondent

My name is Moestaqeem Esau and I am a Masters student in Urban and Regional Planning at CRUISE at the Department of Geography and Environmental Studies at Stellenbosch University. I would like to invite you to participate in a research project titled: Determining the factors influencing patronage and spending patterns at Bayside and Tyger Valley shopping centres in Cape Town. The study aims to determine the factors that influence patronage and spending patterns at Bayside and Tyger Valley shopping centres.

Please take some time to read the information presented here which will explain the details of this project. You may contact me if you require any further information or clarity on the project. Also, your participation is entirely voluntary and you can decline to participate. If you do not participate in the study, you will not be negatively affected in any way. Also, you may withdraw from the study at any point, even if you agreed to participate.

The study is in the process of being approved by the Humanities Research Ethics Committee (HREC) at Stellenbosch University and will be conducted according to accepted and applicable international ethical guidelines and principles.

The interview will take approximately 1 hour. The information received from the respondents will remain confidential and anonymous and no personal information will be disclosed. The data will be made anonymous by using pseudonyms. Participation is voluntary and respondents may withdraw at any time. The data will be stored on a password-protected computer. Upon request, a copy of the thesis will be made available to any respondents involved in the research.

If you have any questions concerning the research, please contact me on 19447175@sun.ac.za or my supervisor lodene@sun.ac.za or 0210 808 9103

Yours Sincerely

RIGHTS OF RESEARCH RESPONDENTS. You may withdraw your consent at any time and discontinue participation without penalty. You are not waiving any legal claims, rights or remedies because you participate in the research study. If you have questions regarding your rights as a research subject, contact Ms Maléne Fouché [mfouche@sun.ac.za; 021 808 4622] at the Division for Research Development.

Moestaqeem Esau
Principal Investigator

I have read and understand the information provided in the " consent to participate in the research".
□ Yes

I understand that my participation is entirely voluntary and that I am allowed to withdraw at any time.
□ Yes

I understand that the information will remain confidential and anonymous and that no personal information will be made available. I also have the right to request a version of the final thesis at any point.
□ Yes

UNIVERSITEIT•STELLENBOSCH•UNIVERSITY
jou kennisvennoot • your knowledge partner

SEMI-STRUCTURED INTERVIEW QUESTIONNAIRE FOR STORE MANAGEMENT/ STORE OWNERS

1. What attracts patronage to the store?

____

2. What encourages spend at the store?

____

3. What discourages patronage and spend at the store?

____

4. Do you as the owner/manager/employee observe patterns in the foot counts to the store?

____

5. Is there a difference between the number of patrons (i.e. foot counts) versus the actual spends? If yes, explain why you think this is the case.

____

6. When is the store the busiest and the least busy? Please explain your answer.

____

7. How do you determine if the store is making a profit?

____

8. Do patrons have the option to shop online and to opt for home deliveries?

____

9. In your opinion, does it impact your store in any way? Explain your answer, please.

____

10. Why was the store located in this shopping centre as opposed to another location?

____

11. Does centre management influence patronage and spend at your store? Please explain.

____

APPENDIX E

UNIVERSITEIT•STELLENBOSCH•UNIVERSITY
jou kennisvennoot • your knowledge partner

STELLENBOSCHUNIVERSITY
CONSENT TO PARTICIPATE IN RESEARCH

PROJECT TITLE: FACTORS INFLUENCING PATRONAGE AND SPENDING PATTERINGS AT BAYSIDE AND TYGER VALLEY SHOPPING CENTRES

REFERENCE NUMBER: Pending
RESEARCHER: Mr Moestaqeem Esau
ADDRESS: The for Regional Innovation and Urban Innovation and Statistical Exploration (CRUISE), Department of Geography and Environmental Studies, Chamber of mines corner of Merrimam Avenue and Ryneveld, Stellenbosch.
CONTACT NUMBER: 060 382 6587

Dear Respondent

My name is Moestaqeem Esau and I am a Masters student in Urban and Regional Planning at CRUISE at the Department of Geography and Environmental Studies at Stellenbosch University. I would like to invite you to participate in a research project titled: Determining the factors influencing patronage and spending patterns at Bayside and Tyger Valley shopping centres in Cape Town. The study aims to determine the factors that influence patronage and spending patterns at Bayside and Tyger Valley shopping centres.

Please take some time to read the information presented here which will explain the details of this project. You may contact me if you require any further information or clarity on the project. Also, your participation is entirely voluntary and you can decline to participate. If you do not participate in the study, you will not be negatively affected in any way. Also, you may withdraw from the study at any point, even if you agreed to participate.

The study is in the process of being approved by the Humanities Research Ethics Committee (HREC) at Stellenbosch University and will be conducted according to accepted and applicable international ethical guidelines and principles.

The interview will take approximately 1 hour. The information received from the respondents will remain confidential and anonymous and no personal information will be disclosed. The data will be made anonymous by using pseudonyms. Participation is voluntary and respondents may withdraw at any time. The data will be stored on a password-protected computer. Upon request, a copy of the thesis will be made available to any respondents involved in the research.

If you have any questions concerning the research, please contact me on 19447175@sun.ac.za or my supervisor lodene@sun.ac.za or 0210 808 9103

RIGHTS OF RESEARCH RESPONDENTS. You may withdraw your consent at any time and discontinue participation without penalty. You are not waiving any legal claims, rights or remedies because of you participatE in the research study. If you have questions regarding your rights as a research subject, contact Ms Maléne Fouché [mfouche@sun.ac.za; 021 808 4622] at the Division for Research Development.

Yours Sincerely

Moestaqeem Esau
Principal Investigator

I have read and understand the information provided in the " consent to participate in the research".
□ Yes

I understand that my participation is entirely voluntary and that I am allowed to withdraw at any time.
□ Yes

I understand that the information will remain confidential and anonymous and that no personal information will be made available. I also have the right to request a version of the final thesis at any point.
□ Yes

UNIVERSITEIT•STELLENBOSCH•UNIVERSITY
jou kennisvennoot • your knowledge partner

RAPID APPRAISAL QUESTIONNAIRE FOR PATRONS

1. What is your main reason for visiting the shopping centre?

 ____

2. What attracts you to the shopping centre?

 ____

3. How far do you travel to get to the shopping centre?

 ____

4. How often do you frequent the shopping centre?

 ____

5. What is the average time that you spend in the shopping centre?

 ____

6. Do you do your primary shopping in the shopping centre? Please explain.

 ____

7. What alternative shopping or shopping centre options do you prefer?

 ____

8. Shopping in the centre: is it planned or spontaneous? Please explain.

 ____

9. When is the best time to visit the shopping centre and why?

 ____

10. Do you often spend more money than planned for when you visit the shopping centre?

 ____

11. What do you dislike about the shopping centre (i.e. things that prevent you from visiting or to spend)

 ____