

SECTION F : ANALYSIS AND FINDINGS ON THE CONSTRUCT/CONCEPTS

(1) Analysis on Tenancy Mix /Crowd Puller

5 core areas were covered under this construct and the findings on each are as follows:-

| Description | Percentage and Remarks |
|--|---|
| No of Stores | 79% of the respondent strongly agree that store variety is critical. |
| Specialisation & or Speciality Malls | Respondent are not keen in visiting speciality malls i.e those selling a particular segment of product only i.e furniture or computer etc. 51% of respondent disagree on specialization of mall. |
| Crowd Puller | 65% agree that crowd puller outlets like Carrefour, Giant, or Tesco are important for the mall's success. |
| Mixture of Local & Foreign Brand | Majority agree on brand mix with local and foreign presence. 91% of respondent are in this category. |
| Entertainment & Leisure built into shopping | 64% have indicated that they look for entertainment and leisure when they go shopping. |

Comments

The outcome of the survey does indicate and reflect the actual consumer choice factors related to shopping.

- Critical choice factors for consumers under this category are store variety, crowd puller stores, brand mix (local & foreign) and entertainment and leisure.

Generally it is also noted that when shopping centers and malls have the above features, there is bound to be large traffic volume. The new word coined for shopping is now "**shopping-tainment**", an indication that shopping, related services and entertainment are crucial and go hand in hand.

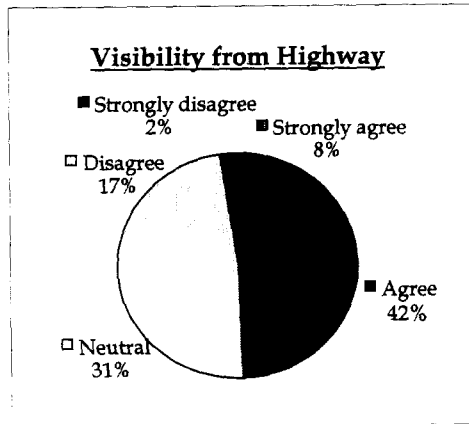
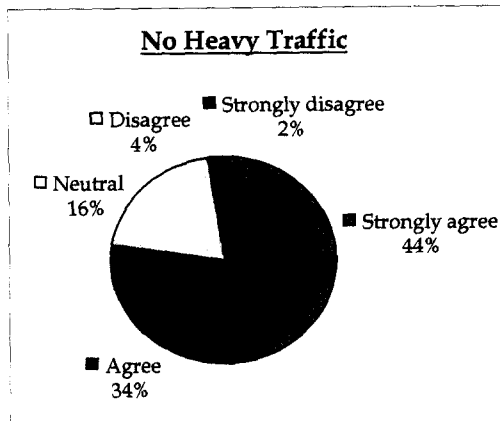
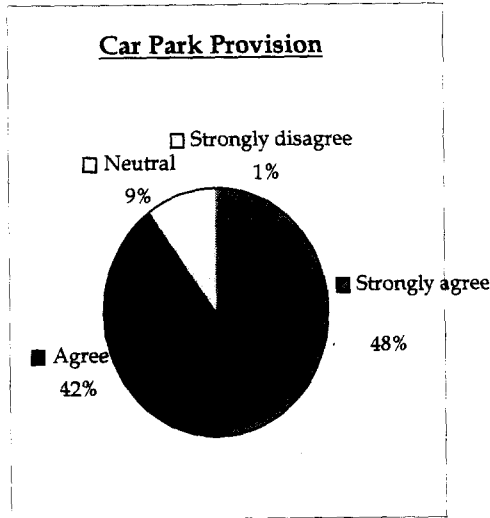
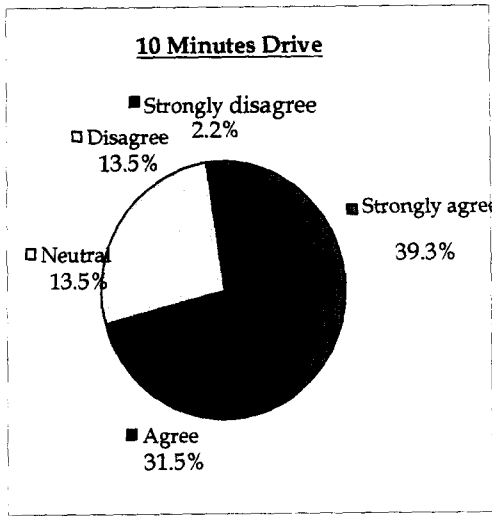
- In line with this findings, hypermarkets and shopping malls are now selling an experience, not just goods. They have now added fun and community in order to compete with each other. There has been a marked rise in these outlets that allow people to congregate, such as coffee-house, tea shops, hawker centres, book stores etc.

- In fact some mall operators have even gone further in their endeavor to gain popularity. A recent discussion, in Dec 2004, with a company called Stretch Marks (M) S/B (an operator of climbing gym) revealed that they have been given the right and tenancy for a mere RM1.00 to operate a climbing gym at the top floor of the currently renovated One-Utama. A climbing gym is one of its kind and seen as a crowd puller with unique attraction. Perhaps this is a fish and bait strategy to pull in the consumers who will later shop and be entertained with other offerings.
- It is noted that category killers are now gaining popularity like IKEA , Toys”R” Us etc. Majority of the respondents are not keen on shopping at these outlets. In fact it is an interesting question as to why would consumers want to shop and travel to different stores for each category of purchase if they can obtain all in one store?

(2) Analysis on Location

- Views on 5 factors in location were sought, i.e, Distance, Easy accessibility, Car Park Provision, Non heavy traffic area and Visibility from highway. Below are the results.
- The most important factor for the respondents were Car Park provision 89.9% agrees. Respondent do not prefer heavy traffic area (77.6%). Followed by distances (70.8%). Easy accessibility via public transport and visibility from highway with result 50.6% and 49.5% respectively are not as important to them.
- Change of lifestyle, where consumers are less dependent on public transport made Mall that have ample space for to provide Car Park provision a highly popular choice among other location factor. The results indicate that a high traffic area is not very popular probably due to the stress in driving. Consumers generally would have faced traffic congestion problem when they are going to work and would prefer a less congestive area for shopping. Advertisements aired in TV probably made visibility from highway not an important issues for shoppers.

Graphical Illustration of the above findings are depicted below: -



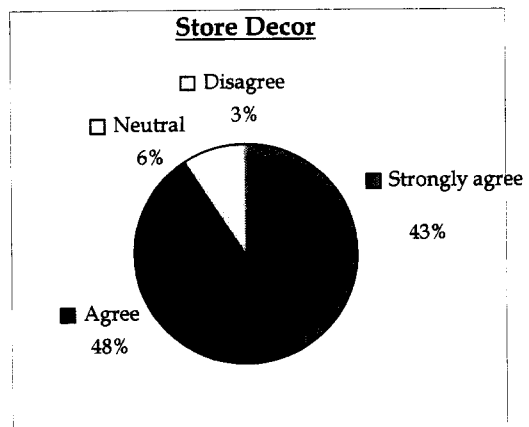
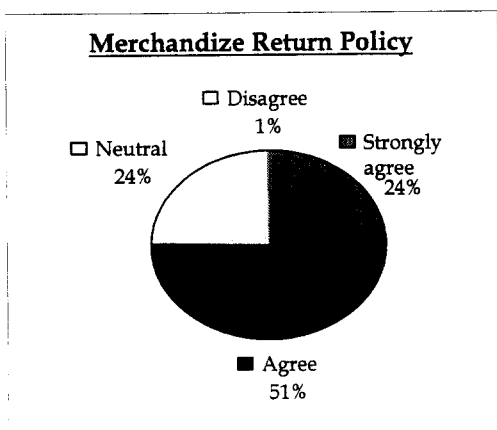
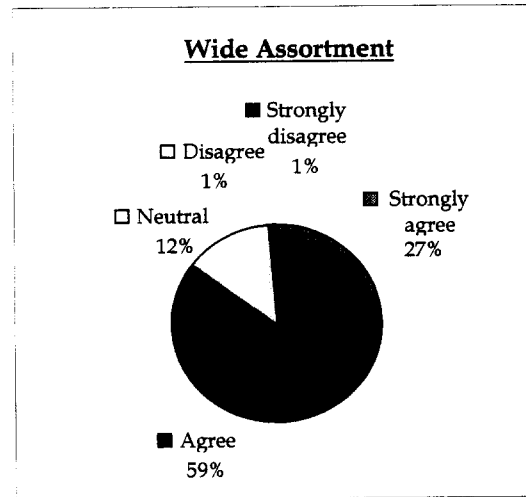
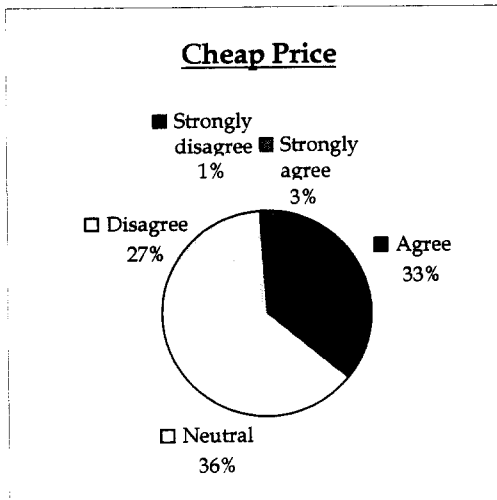
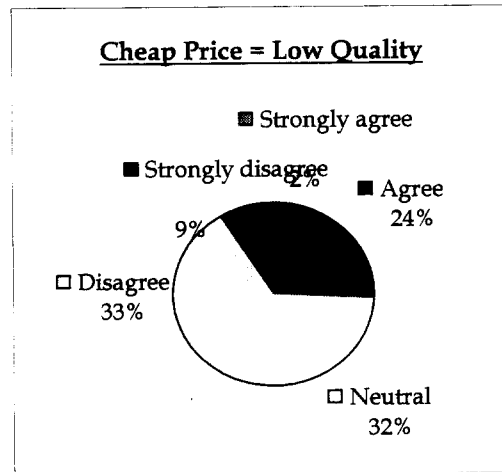
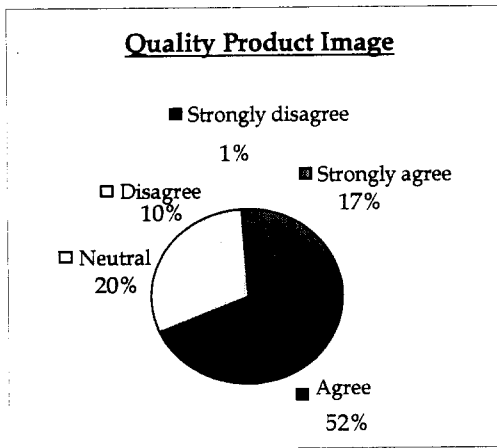
(3) **Analysis on Mall Image**

- To ascertain whether image plays an important role on mall success, a few questions on shopping mall image were incorporated in the questionnaire. There are image of quality products, image cheap products, whether cheap price has any effect on mall image, whether assortment of goods has any effect, whether a good return policy is favorable and whether store décor is important.

- It is noted that that consumers prefers to go to malls that has good store decor (91%), has wide assortment of products (85.4%) and has a good returned policy (75.3%). Further, it was found that mall image does not attract customer even an image of selling a high quality products only attract 68.5%. Most consumers do not agree or neutral to the maxim that cheap price means low quality (74.2%). It was probably due to past experience or due to the higher education of most of the respondent where 65% of them are degree holder and above. As such it is not surprising that cheap prices also do not have bearing to the mall (64.1%).

- The results indicate that the targeted respondent regards shopping as an excursion or family outing where, store décor i.e. good light, wide isle and the right temperature would play an important role in keeping the consumer happy. Wide assortment of products provided consumers a variety of products where consumers do not have to go any other place for shopping. Surprisingly, quality and price are not as important factor to consumer. The result however, may not indicate the true picture of all consumer behavior since the image ranking differs from market segment to another.

Graphical Illustration of the above findings are depicted below: -



(4) **Analysis on Mall Facilities and Its Importance**

- There were 13 items representing various type of facilities deemed crucial or relevant for a consumers in preferring a particular shopping outlet for another.
- Respondent were asked to rate in order of priority from 1 to 13. The number 1 is to be placed for the most preferred facility while number 13 is to be placed for an item deemed least preferred in a shipping mall or hypermarket.
- Based on the assessment of the survey forms, the following were the top five in the list of preferred facilities: -
 - **Ample car park, wide range of products at different price range to suits customers taste and preferences, located at strategic area, have restaurants, cafes, food courts and have escalators and travelators at strategic location to ease shoppers using trolley for their convenience in the mall.**

- Therefore, shopping malls with good location and lots of parking facilities such as KLCC, Mid Valley Mega Mall and I Utama have many shoppers all year round. Most Malaysians are very worried of inconvenience of parking facilities because they prefer to drive to shopping due to inconvenience of public transport. Shopping centres and hypermarkets should take note of this finding and enhance these core facilities.
- Of least importance were the following :-
 - **availability of sports facilities, available of medical facilities, adequate amount of shopping trolley (this was probably there was always sufficient trolleys and this was never an issue) and available of child care centre with security for the parents convenience**
- As for sports facilities and medical facilities, would suppose that shoppers will not be in the mood when they go for games and obviously when they are medically not well they do not like to go into a crowded shopping alley to see a doctor, neither would one go for shopping after taking medication.
- Therefore, the management of the shopping mall should be more sensitive with their customer taste and preference and always conduct research to check on their customer feedback about their mall preference.

- Most of the questions are based on descriptive analysis, therefore the results are towards the frequency testing only.

- The table below shows the full ranking by the respondent of all the 13 facilities that were put forward.

Summary of Facilities and Respective Ranking

| No | Type of Facilities | No. of Respondents | Rank |
|----|---|--------------------|----------|
| 1 | Ample of car parks | 50 | 1 |
| 2 | Availability of ATM machines for customers' convenience | 12 | 7 |
| 3 | Located at strategic area | 44 | 3 |
| 4 | Adequate numbers of restroom | 8 | 9 |
| 5 | Available of entertainment facilities (eg. Cinemas, karaoke, etc) | 14 | 6 |
| 6 | Availability of sports facilities (eg. Bowling, archery, futsal, etc) | 4 | 13 |
| 7 | Available of child care centre with security for the parents convenience | 8 | 10 |
| 8 | Have restaurants, cafes, food courts | 28 | 4 |
| 9 | Adequate amount of shopping trolley for shoppers especially on weekends | 7 | 11 |
| 10 | Have escalators and travelators at strategic location to ease shoppers using trolley for their convenience in the mall | 19 | 5 |
| 11 | Wide range of products availability and varieties at different price range to suits customers taste and preferences. | 49 | 2 |
| 12 | Have good and well management security systems and guards (safety purpose) | 11 | 8 |
| 13 | Available of medical facilities such as clinics and dental for shoppers convenience and during emergency | 7 | 12 |