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CONSUMER PERSPECTIVE AND SHOPPING MALL APPROACHES

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***Abstract*— As the standard of living has increased, the purchasing power of consumers has increased manifolds. According to In consumer spending (2004-2017) Consumer Spending in India has increased from 17,809.14 billion INR (fourth quarter of 2016) to 18,483 INR Billion in the first quarter of 2017; however, the average spending in 2004 was very low i.e. 9987.55 INR Billion which has reached a height of 18,483 INR Billion in 2017.**

Keywords – Mall design, consumer attitudes, Shopping, retail

I. INTRODUCTION

In 2023 mall supply of around 10 million sq. ft is expected to get operational with 25 new malls entering the market across the top seven cities of India (Delhi NCR, Bangalore, Hyderabad, Mumbai, Pune, and Kolkata).Delhi NCR and Bangalore will be the major contributors with a 53% share in the upcoming supply," said Rahul Arora, head, office leasing advisory and retail (India), JLL. The demand for superior grade shopping malls is quite high in India as retailers have a strong appetite for prime retail spaces that have high footfalls. Therefore, vacancy in such malls is lower at single digit compared to 'good' and 'average' malls. This trend is expected to continue as both retailers and consumers prefer such malls. Indian shopping malls are also churning their brand mix to accommodate global marquee brands. These days, consumers/ shoppers are looking for a holistic shopping experience and not merely looking to close transactions of products. One major technological advancement in the retail industry is the merging of online and offline businesses. All major players and mall developers have aided themselves with technology in terms of mobile apps and/or mobile/computer websites to make the buying decision more conclusive for the buyers. But the biggest challenge that lies with the introduction of technology in offline retailing is to maintain it. Experiential shopping is surely the 'buzzword' in the Indian retail block. Let's delve deep into ways and means adopted by mall operators to provide a holistic shopping experience to the consumers.

A. Retail Attractiveness

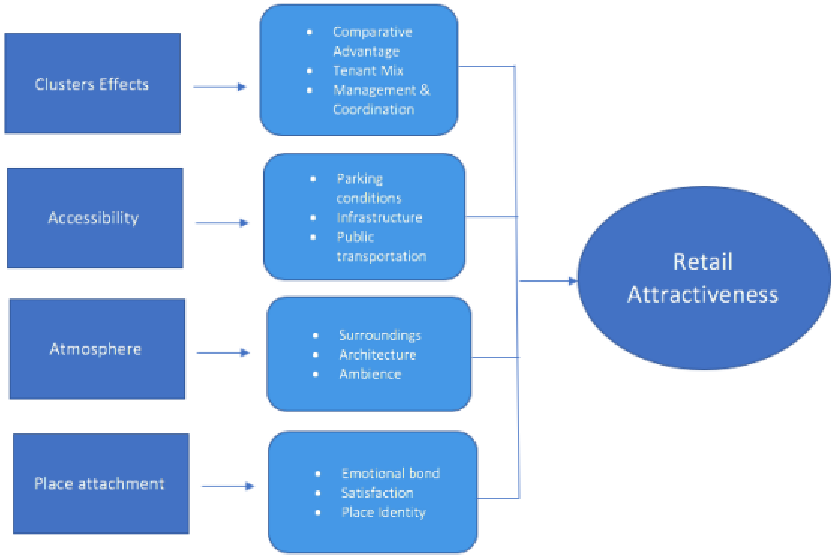

Fig.1 Factors influencing Retail

B. Increasing Average Mall Size in India

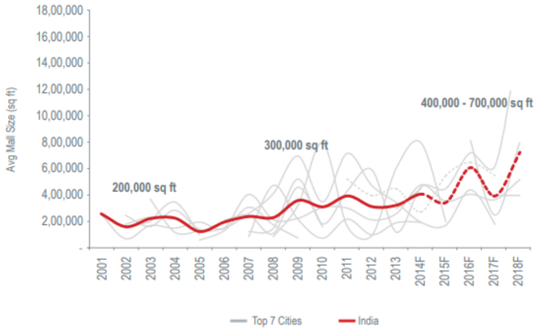

Fig.2 Indian mall size growth factor

II. SHOPPING MOTIVES

Many variations of answers were collected from Pheonix Market city, Velacherry, since respondents responded to an open-ended question to report their motives for choosing the particular mall. Each shopper provided at least one motive. We categorized the answers into eight reasons that motivated shoppers to choose the mall: “to go shopping”, “to use entertainment facilities”, “for leisure”, “to walk around”, “to socialize”, “to work”, “to use service facilities”, and “to pass through”. Answers, which did not belong to these categories, were coded as “others”.

A. Motive to visit the Mall

Motive	Frequency	%
To go shopping	344	44.97
To use entertainment facilities	134	17.52
For leisure	96	12.55
To walk around	90	11.76
To socialize	69	9.02
To work	14	1.83
To use service facilities	13	1.70
To pass through	4	0.52
Others	1	0.13
Total number of motives	765	100

B. Factors to choose the mall

Variables	Frequency	%
Products & Stores	374	32.27
Activity	242	20.88
Accessibility	218	18.81
Entertainment & Services	192	16.57
Atmospheric	68	5.87
Price	45	3.88
Public facilities	5	0.43
Personal service	4	0.35
Other aspects	11	0.95
Total	1159	100

C. *Factors influencing mall choices*

Factor To Choose The Mall	Local Shopping Mall N=218	Modern Shopping Mall N=225	Classic Shopping Mall N=227
Products and Stores**	37.27%	28.29%	31.47%
Activity**	22.57%	23.08%	16.80%
Accessibility**	12.86%	19.60%	24.00%
Entertainment and Services	17.06%	18.36%	14.13%
Atmospherics*	4.46%	4.22%	9.07%
Promotion and Price	4.20%	4.71%	2.67%
Public Facilities	0.52%	0.25%	0.53%
Personal Service	0%	0.50%	0.53%
Miscellaneous	1.05%	0.99%	0.80%
Total	100%	100%	100%

D. *Behaviour Characteristics of Social shoppers*

		Local Mall (32.1%) cluster 3	Modern Mall (15.6%) cluster 4	Classic Mall (18.5%) cluster 2
Duration of mall visit in minutes		153.0 (91.33)	139.9 (71.23)	80.0 (54.19)
Duration of mall visit	<30 minutes	0.00%	2.86%	9.52%
	>30 minutes - 1.5 hours	31.34%	28.57%	69.05%
	>1.5 hours	68.66%	68.57%	21.43%
Average number of Store visits		2.8 (1.05)	4.3 (0.98)	1.8 (1.00)
Total number of store visits	1 stores	5.71%	0.00%	45.24%
	2 - 3 stores	71.43%	25.71%	47.62%
	4 - 6 stores	22.86%	74.29%	7.14%
	>6 stores	0.00%	0.00%	0.00%
Average total expenses in IDR		177693 (183579.1)	268114 (212238.5)	187146 (192347.2)
Average expenses for food-and-beverage in IDR		48279 (43163.3)	95029 (61146.2)	66878 (90860.7)
Average expenses for non-food-beverage in IDR		129414 (164881.4)	173086 (177695.3)	120268 (161330.7)
Time of visit	Morning	13.43%	8.57%	12.20%
	Morning to afternoon	13.43%	20.00%	7.32%
	Morning to evening	1.49%	0	2.44%
	Afternoon	41.79%	40.00%	53.66%
	Afternoon to evening	17.91%	17.14%	9.76%
	Evening	11.94%	14.29%	14.63%
Day of visit	Weekdays	61.19%	54.29%	66.67%
	Weekends	38.81%	45.71%	33.33%

E. *Length of stay in mall*

Average time of mall visit		84.17 minutes (66.62)
Average time of mall visit when visiting alone		50.79 minutes (47.15)
Average time of mall visit when accompanied by 1 companion		68.08 minutes (48.65)
Average time of mall visit when accompanied by >1 person		77.20 minutes (54.31)
Average time of mall visit when meet friends		105.93 minutes (91.18)
Duration of mall visit Min = 4 minutes and max= 480 minutes	<30 minutes	12.05 %
	30 minutes - 1 hour	31.33 %
	>1 - 2 hours	39.16 %
	>2 hours	17.5 %

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F. Length of time of visits activity

	Category	N visits	Average time duration
Store visits	Anchor store:		
	Supermarket	59	35.61 Minutes
	Department store	89	14.24 Minutes
	Specialty store		
	Apparel-and-accessories	103	8.42 Minutes
	Media-and-special interest	66	16.67 Minutes
	Health-beauty	27	18.96 Minutes
	General-merchandise	0	0 Minutes
	Food	3	3 Minutes
	Furnishing	16	9.91 Minutes
	Eating-places	91	47.34 Minutes
	Entertainment-and-education	33	26.42 Minutes
Facility visits	Product-service	43	5.17 Minutes
	Public service	50	7.2 Minutes
Use of Public Space	Socializing, sitting down, window shopping, to-see-and-be-seen	79	

III. MALL CLASSIFICATION AND EVOLUTION

Malls are classified by their size, competitiveness, and profitability. Studies show that while class a malls are faring well and are actually showing improvements lower class malls continue to lose their competitiveness leading to their closure.

Class A

4% vacancies and 15% rise in asking rents dominant property in major metro markets, top anchors and at least $400 per square foot in retail sales

Class B

6% vacancies and no change in asking rents non-dominant competitor in its trading area, typified by tenant sales of less than $400 per square foot

Class C

<10% vacancies and 15% fall in asking rents a weaker player sales of less than
$250 per square foot, competitive disadvantages: inferior location, vacant anchor space, etc

A. State of Mall

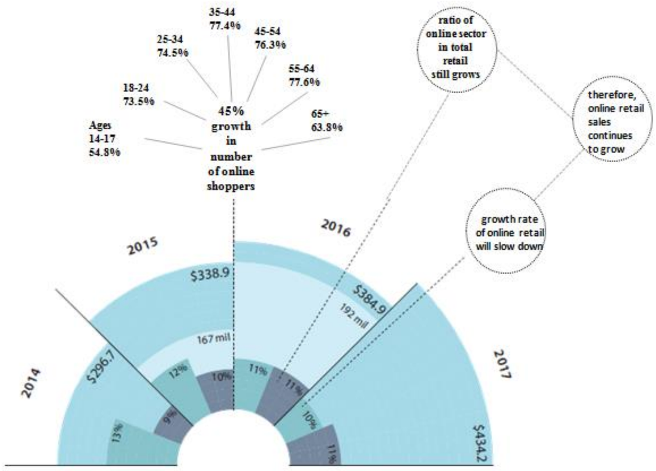

Fig.3 State of Mall

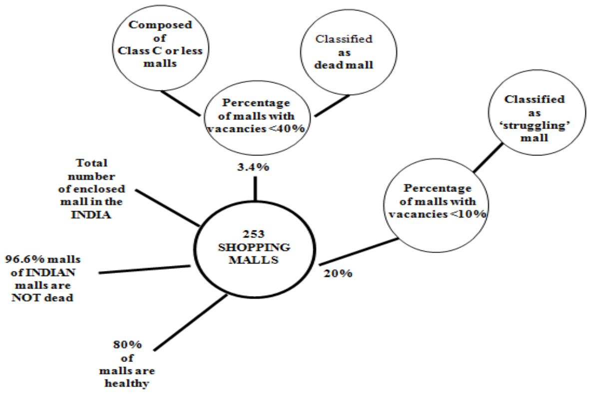

Fig.4 Mall abundance

B. Evolution of mall

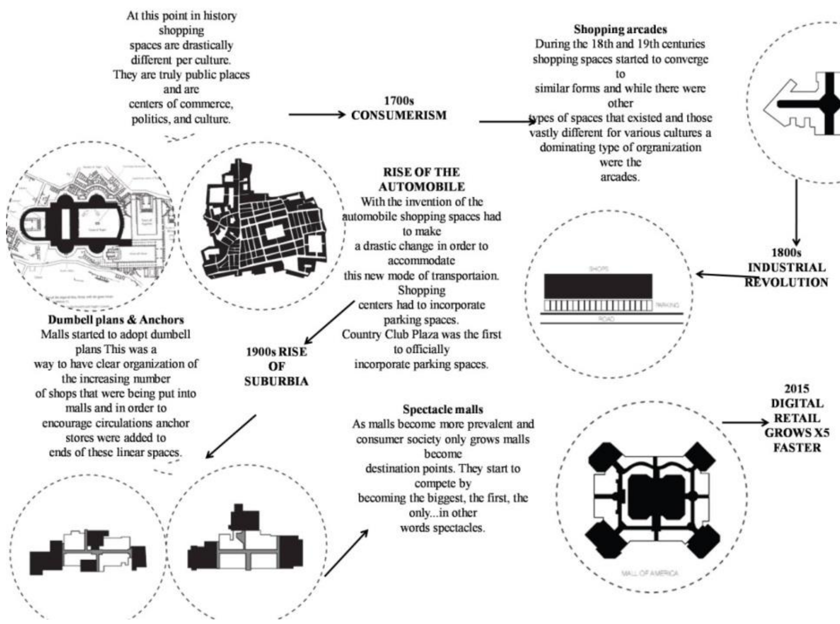

Fig.5 Evolution of mall since ages

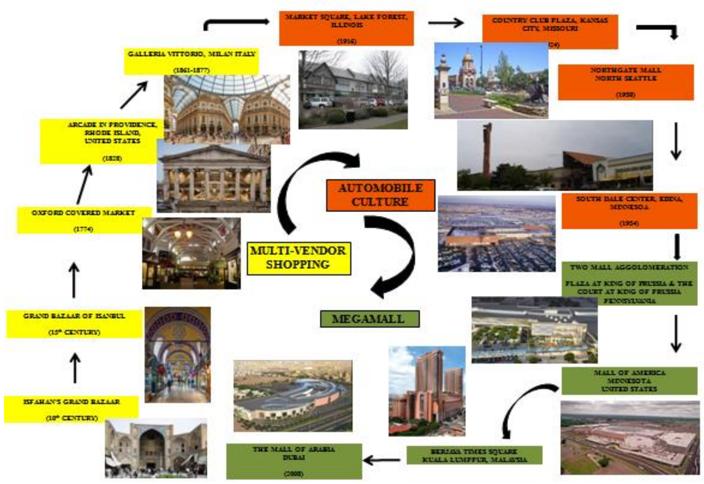

Fig.6 Evolution of mall after industrialisation

C. Concept, Experiecne and Convenience

The 'Big City Centre Vote' also confirms trends that have been evolving rapidly in the past two years; that mall visitors are increasingly looking for speed, convenience, touch less technology and safety, personalization, as well as a blend of physical and digital experiences, which allow them to have a more streamlined and seamless mall journey. Alongside technologies that enable seamless experiences, tech-driven experiential concepts are also coming up as front of mind for respondents — who are voting to see more virtual and augmented reality (AR) experiences made available. 30 percent of the MAF survey respondents have said they would find 'escaping to a virtual world' most fun. Another theme that is developing across several categories of the 'Big City Centre Vote' shows that respondents are looking for more diverse family-orientated experiences and children-dedicated spaces in their mall. 31 percent of MAF survey respondents have expressed the desire for more child-friendly restaurants with more dedicated kids' menus and play areas. Additionally, when asked what their kids would like more of, majority parents across all malls are choosing 'more active play areas' in the mall followed secondly by 'more kids' workshops'.

IV. DATA REQUIRED FROM STUDY

Our smart phones are leading to certain changes in the way people shop. a. Beacon technology allows businesses to target, connect, and advertise to shoppers in proximity to not only the store but specific items within the store.
According to BI Intelligence, this technology will account for $44 billion in sales in the coming year of 2016. b. Virtual shopping starts to question the definition of a shopping space since instances like Tesco's subway grocery store shows the potential fluidity of shopping spaces. Retailers have started to shift their focus to experience oriented shopping . Malls aren't actually dying off like many think. Only 3.4% are dying, which means 96.6% is doing fine. Shoppers choose online shopping due to convenience factors; being able to shop whenever, low prices, quicker process, easier than going to stores, etc. The way people shop has already started to change into 'multichannel' or 'hybrid' methods. Older mall plans have relied on the dumbbell plan. Anchors have primarily been used in the past as a method to get shoppers to move throughout the mall. The growth of digital commerce is 5x that of physical retail (BI Intelligence). Studies show that people seek that mall because of it social aspect. The biggest and newest malls, which make up about a third of malls are thriving.

1) Dubai Mall

A lost opportunity since women influence 80% of all purchases in Dubai. Female Emirati citizens spend 43% of their income on fashion shopping – triple that of the expat population. And a third of these Emirati women spend over 60% of their monthly income shopping. UAE consumers can be hard to impress. To earn their loyalty, start with excellent customer experience. 65% of customers expect brands to connect with them personally and treat them as individuals. That's 9% higher than the global average expectation for personalized service. Offering exclusive rewards and benefits appeals to 69% of Emirati shoppers, with 43% encouraged to spend higher and more frequently by having a personal shopping advisor.
The Dubai Aquarium with its 270 degree walk through tunnel and its world largest viewing window, houses more than 40,000 living specimens including more than 400 sharks. World's largest Acrylic Panel, measuring 32.88 meters wide x 8.3 meters high 750mm thick and weighing 245.614Kg. The mall area consists of four levels of shopping area. The structure of the mall utilizes more than 13,000 tons of structural steel or around twice the amount utilized in the Eiffel Tower. The parking area accommodating a total of 14,500 vehicles is made up of two buildings with 10 levels of parking each and two levels of underground parking.

Fig.7 Site plan of Dubai mall

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Fig.8 Interior of Dubai mall

B. DLF Mall of Noida

Introducing the concept of ‘’ Zones in India”. 330+ brands & 82+ Kiosks Brands. Approx40% space is dedicated to F&B, Casual Dining and Indoor Entertainment, Total 75 Food & Beverages Options Including 51 Cafes and Casual Dining Restaurants and 24 F&B Kiosks. 7 star DT Cinemas screens designed by the known Mesbur+Smith(specializing in entertainment architecture) with a seating space for 2000 audience. The largest food court of the country with seating capacity of 1200 people designed by Varney designs .The unique design element of the mall would be the Racetrack Atrium to give an excellent visibility for all store fronts coupled with 73 escalators, one express escalator, and revolutionary travellators for the comfort and convenience of Shoppers / Customers.

The unique design of the Mall of India includes special features like race-track atriums which run through the property, ensuring optimum visibility to all stores since their facades face the atrium therefore gain equal visibility and prominence. The mall ensures continuous flow of movement.

- Due to non linear corridor the sense of curiosity generates.
- Although it is the largest mall of India but because of its design one can never feel that.
- There are five escalator sets and all of them run from the third basement to all the way up. Along with escalators, there are bridges too. These all ensures easy flow of movement.
- The entertainment city is split into two levels and there is double box. This place will cater to everything from bowling to skating.
- The Mall’s unique zoning strategy is making the shopping experience much easier.

Kiosks are made in order to gather and endure the environment. For informal meetings there were assembly points outside the building too. A Mall/supermarket appeals because of its pleasant surroundings, better product display and the availability of a wide variety of brands.

The 7-star DT Star Cinemas also has special treat for kids in the form of a unique auditorium for children with a specially designed kids candy bar. Leisure Land also includes a massive food court which offers refreshing mix of brands covering all popular food court cuisines.

Fig.9 DLF MALL exterior view

Fig.10 Ground floor plan

V. CONCLUSION

Studies show that, as a result, more competitive malls in Class A and even some Class B malls are shifting their focus to branding a memorable experience for shoppers in the mall. And due to the volume of programs and activities that take place in Class A malls they are almost always very large.If a new type of shopping space were to incorporate a variety of *alternative programs* and organized it in a *new plan strategy* that wasn't the dumbbell type plan, where retail anchors are used, a new kind of shopping space could emerge where alternative activities and shopping could mesh fluidly so that they aren't separate nodes of programs. If these shopping spaces then were to *implement existing technologies* into the design of the space and experience, not only would there be a unique experience for the shoppers but the *spatial organization* might start to shift from existing ones. And, as a result, there could be potential solutions to the issue of the 'gray box' malls that *retains the size factor* that brings in the revenue but provide a spatial experience that *breaks up the 'gray box'.*

The smaller the mall, smaller the number of footprints as they used to know about the shop details in one visits itself. So bigger the size of mall will encourage visitors to visit multiple times to cover the entire area. As it is bigger the size it is difficult to remember about the shop details and its location this will attract number of footprints again and again, increases retail percentage too.

The respondents interviewed in the study have favorable attitude towards shopping malls. Convenience of having everything under one roof, with no weather worries has been considered the most attractive aspect to young consumers. Hedonic aspects such as browsing, window shopping, playing area for kids, space for various shows, exhibitions, spending quality time with families have been ranked as the second important aspects followed by extensive variety of brands/stores, ambience, awareness offered by malls. However, respondents expressed concern regarding crowd on festivals or messy felling when one visited mall in the evening. It is interesting to note that the respondents who were interviewed believed that malls have brought westernization, modernization, brand consciousness, brand culture and so on.

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