

A STUDY OF THE MUTUAL SQUARE
SHOPPING CENTRE IN A COMPETITIVE
RETAIL MARKET

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1.0 INTRODUCTION

The greatest growth in the suburban shopping centre industry in South Africa occurred in the late 1960's and early to middle 1970's. Mutual Square, a small neighbourhood centre situated on Davenport Road, was one of the first suburban shopping centres in the Greater Durban area when it commenced trading in 1965.

The convenience aspect and the tenant mix of the centre rapidly led to success. The supermarket (Checkers) developed into what was reputed to be "The Supermarket" with the highest turnover in the country at the time. Shopping centres such as Sanlam Centre in Umbilo Road (O.K. Bazaars and \pm 20 line shops) and the Glenwood Shopping Centre (Woolworths plus 25 line shops) were never really considered to be serious competition as there was a sufficient market for all.

The opening of the first phase of Berea Shopping Centre (Pick 'n Pay and \pm 10 shops) in November 1973 had an immediate effect on the trading at Mutual Square, particularly the supermarket. However the tenants were able to live with this additional competition.

From this point onwards there were a number of new shopping centres opened :-

- 1974 - Old Mutual Centre Montclair
(Pick 'n Pay plus 40 shops)

- 1975 - Windermere Centre
(Checkers plus 45 shops)

- 1976 - Phase 2 of Berea Centre
(O.K. Bazaars plus 20 shops)
- Overport City
(Checkers plus 28 tenants and plenty of
unlet space)
- 1976/77 - Musgrave Centre
(Pick 'n Pay, John Orrs plus 42 shops)
- 1977 - O.K. Hyperama ; Prospecton
- 1978 - Pick 'n Pay Hypermarket by the sea
- 1980/81 - Revamp of the old Glenwood Centre which
became Buxtons Village with a Spar
Supermarket as the new anchor tenant.

So from a position of relative dominance in the sub-urban retail scene, Mutual Square found itself in one of extremely intense competition, with larger, newer and more attractive centres springing up all around. All these centres and Hypers are within a twenty minute driving time of Mutual Square and five of them within 3 - 5 minutes driving time.

(Diagram 1.1)



Much the same as the C.B.D, Mutual Square found its trade area being eroded by competition.

An excellent barometer of the gradual market erosion is the turnover of the anchor supermarket at Mutual Square. Diagram 1.2 illustrates the percentage increase/decrease units of the actual turnover as opposed to the real turnover percentages once it has been deflated by the Consumer Price Index (food only) 1970 = 100. The graph clearly depicts a negative growth trend starting its decline with the opening of the newer centres.

Diagram 1.1

THE CATCHMENT STUDY AREA

-  Mutual Square
-  Buxtons Village
-  Berea Centre
-  Musgrave Centre

-  Primary Area
-  Secondary Area

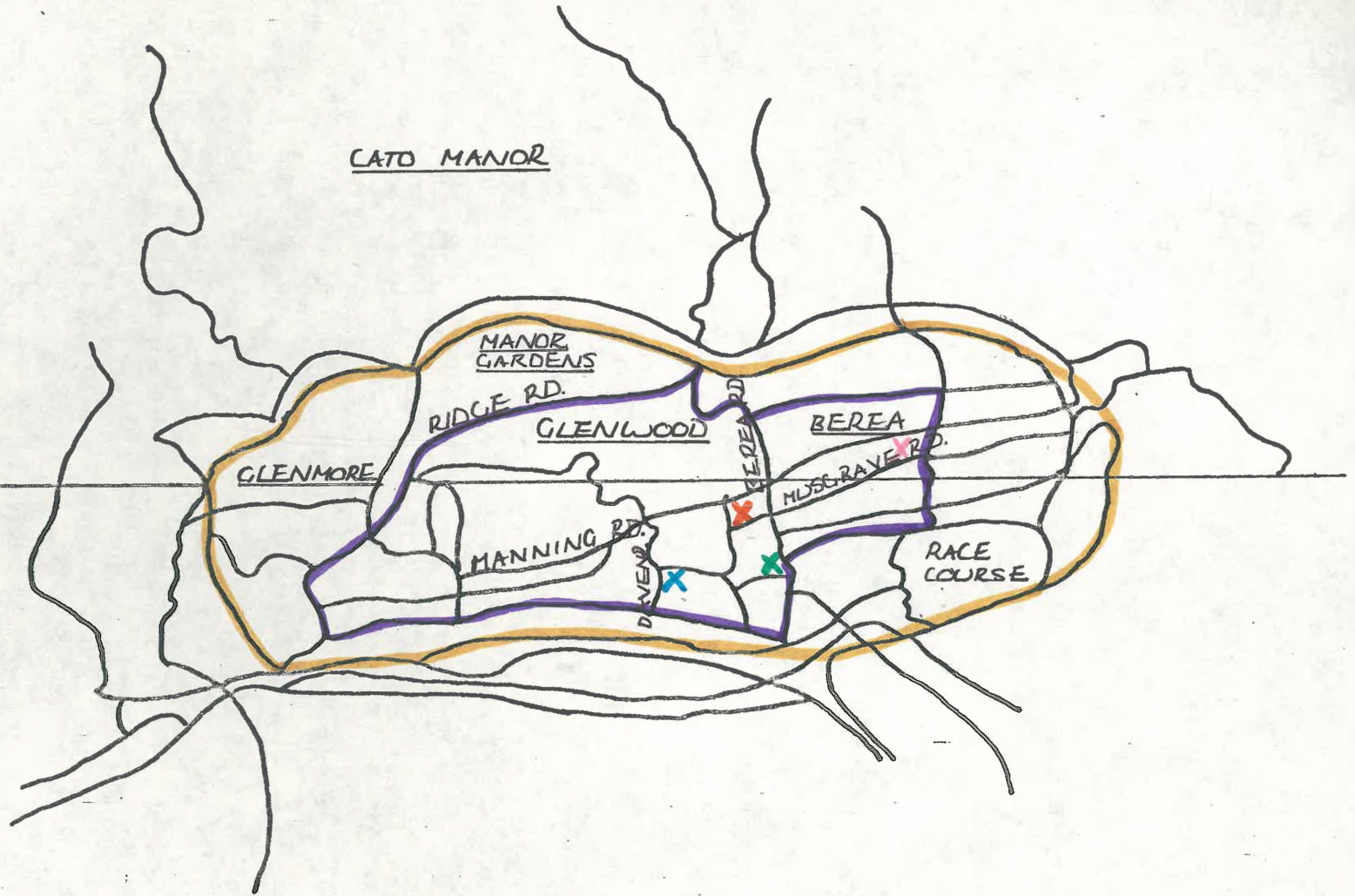
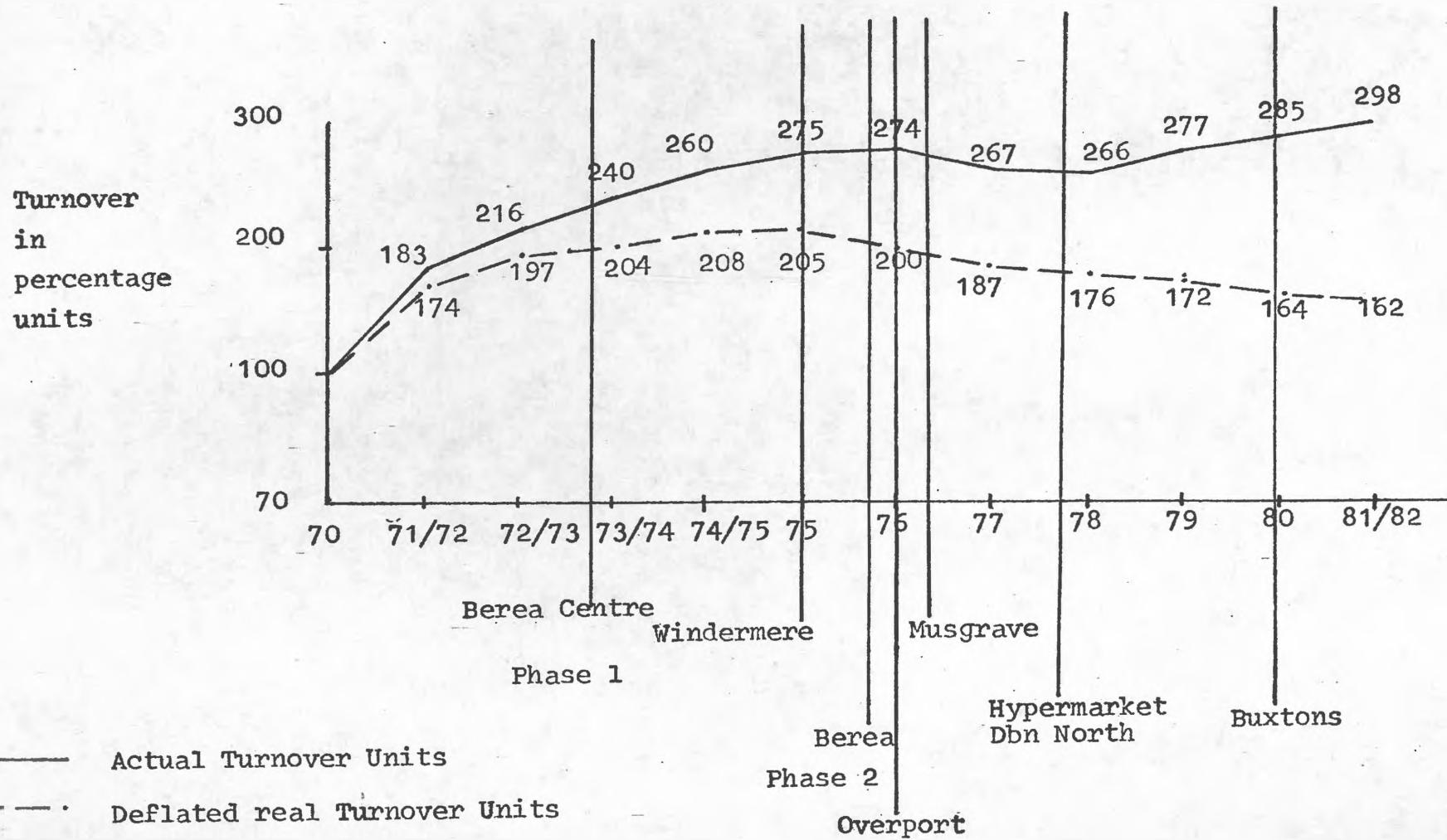


Diagram 1.2



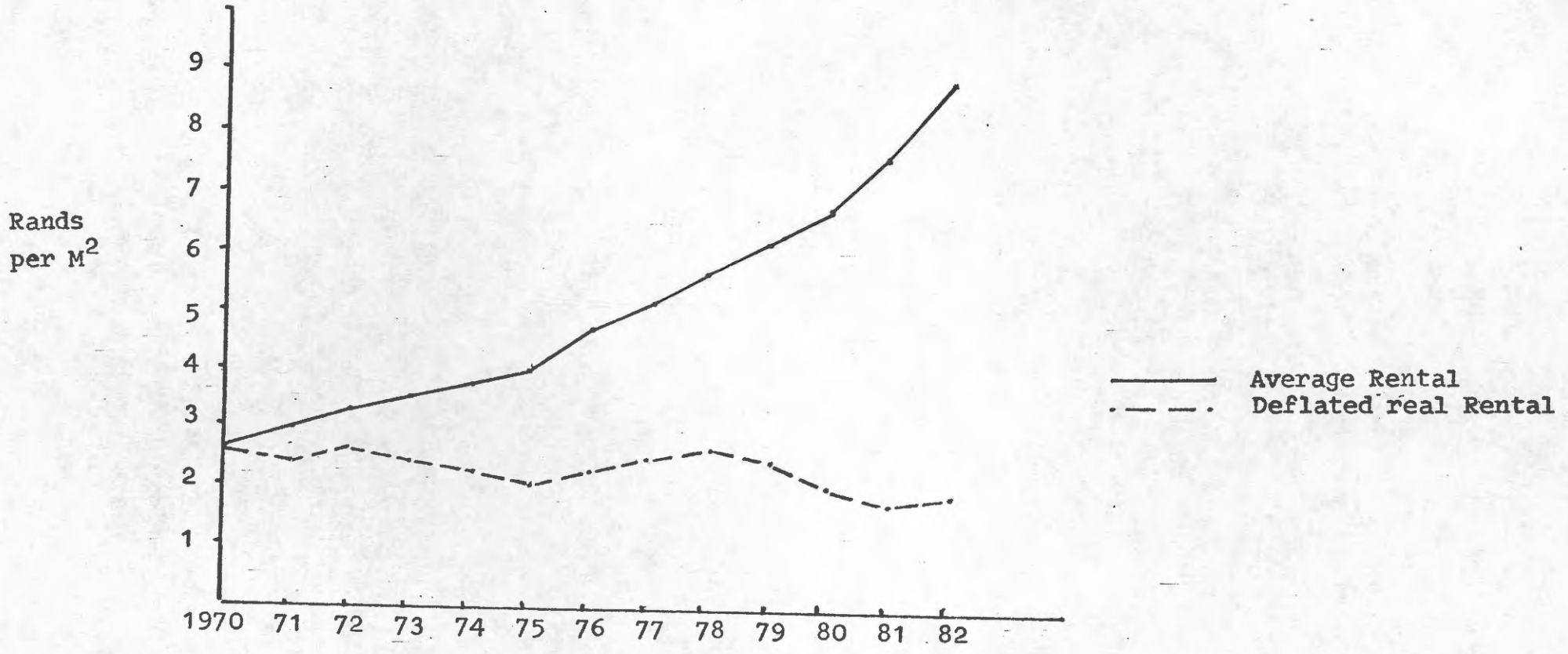
Another indicator is manifested in the rentals achieved by the landlord. Diagram 1.3 illustrates the actual average rental per m², per annum, that has been achieved since 1970 and the rentals once they have been deflated by the Building Cost Index (1970 = 100). Here again the growth trend is a negative one hence indicating that the landlord is achieving a negative return on the retail space in Mutual Square.

Looking at the physical layout of the Centre itself there are some general observations :

- The centre has little impact or attraction on the main approaches of Brand and Davenport Roads. The sole centre or traders name likely to be noticed by motorists or pedestrians is for the supermarket.
- Shoppers parking at the centre is unannounced from the surrounding streets and access is gained through the same entrances as service vehicles, and in addition from Brand Road, along with the petrol filling station customers.
- Parking spaces for flat residents and workers in the offices are undistinguished from shoppers spaces.
- There is a car body repair shop at ground level and this business spills out into the parking area and vehicles are often there for up to three weeks.
- The number of car parking spaces meets only the minimum requirement of the local planning authority when related in particular to the retail floorspace.
- The layout and organisation of the tenants in the shopping centre shows no uniformity. Diagram 1.4 shows the layout of tenants in the centre by shop

Diagram 1.3

GROWTH OF AVERAGE RENTAL RATES

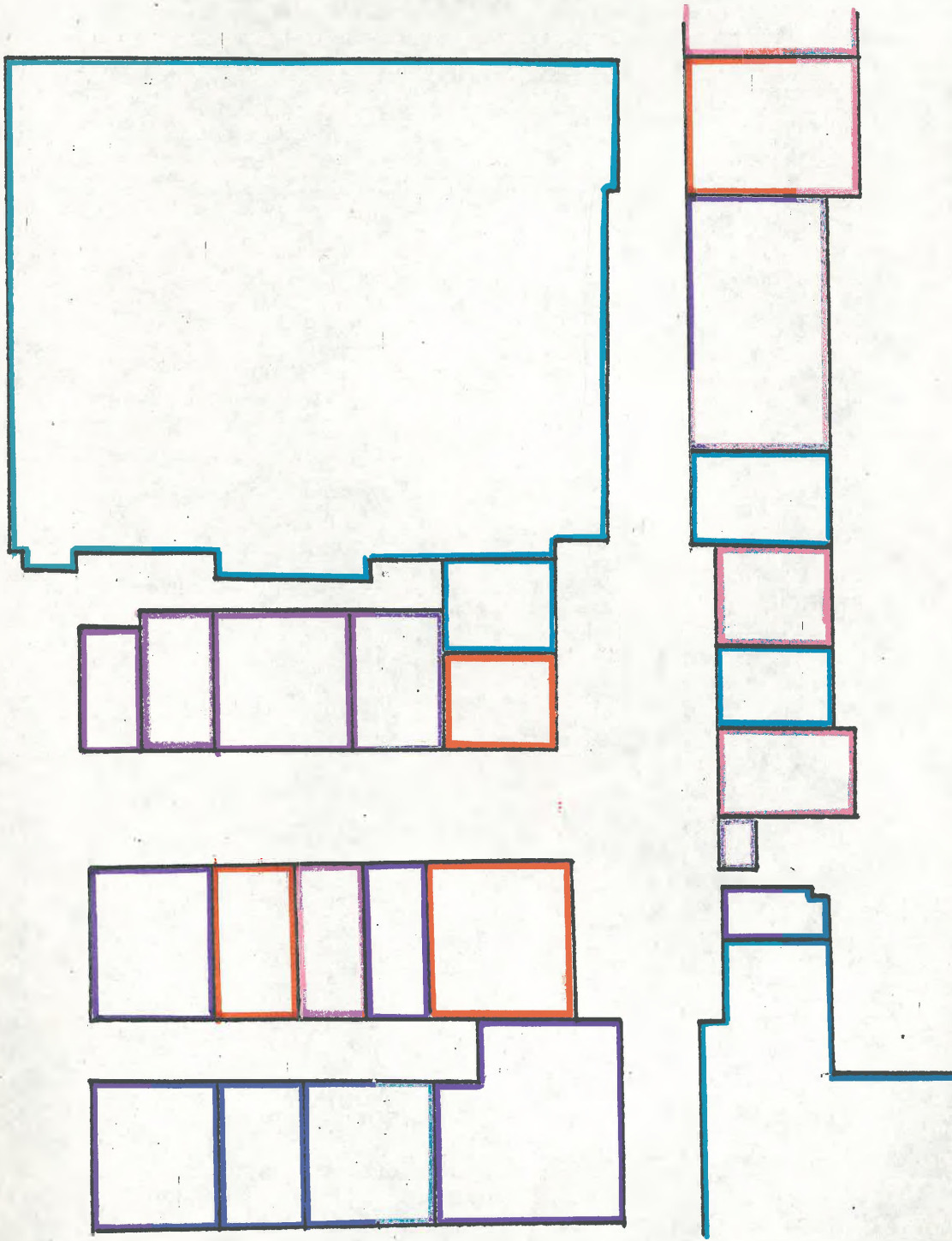


type. One particular example is the placement of the butchery between a building society and C.N.A.

- The malls from the three entrances converge to form a central uncovered square. In addition to wind blowing along the malls, the highrise block adjacent to the square causes considerable down draught.

Diagram 1.4

PRESENT LAYOUT OF SHOPS



2.0 CONCEPTS AND DEFINITIONS

2.1 DEFINING A SHOPPING CENTRE

The shopping centre is a specialised commercial land use and building type commonly found in suburban areas. The Community Builders Council of Urban Land Institute have defined a shopping centre as :-

"A group of architecturally unified commercial establishments built on a site which is planned, developed, owned and managed as an operating unit related in its location, size and type of shops to the trade area that the unit serves. The unit provides on-site parking in a definite relationship to the types, and total size of the stores." ¹

Gruen and Smith (1960) define a shopping centre :-

"The shopping centre is one of the few building types which represent a response to the emergence of the automobile as a means of mass transportation. It is the grouping of buildings and related spaces, establishing a new environment in 20th century life, not only for shopping but many other activities as well. The centre, furthermore, is the expression of a rare occurrence in our free enterprise economy - the bonding together of individual businesses in co-operative fashion with the aim of creating greater commercial effectiveness through unified endeavour." ²

1 McKeever, J and Griffin, N "Shopping Centre Development Handbook" - Washington 1977.

2 Gruen, S and Smith L ; "Shopping Towns, U.S.A" New York 1960

So generally speaking the elements which characterise a shopping centre and set it apart as a building type are :-

1. Unified architectural treatment for buildings that provide space for commercial establishments which are selected and then managed.
2. Unified site, suited to the type of centre called for by the market. The site being located for easy access from the trade area.
3. On-site parking arranged to provide adequate entrance and exit and acceptable walking distances from parked car to the stores.
4. Service facility for goods delivery, separated from customer awareness.
5. Tenant grouping that provides merchandising interplay among stores and the widest possible range and depth of merchandise appropriate to the trade area.
6. Agreeable surroundings for shopping in comfort, convenience, safety and quality of design.

2.2 HISTORY OF SHOPPING CENTRES

According to P.H.W. Johnston ¹ the shopping centre is the outcome of man's strivings to make life easier. It is a direct response to the increasing chore that shopping in the C.B.D. is becoming to the householder, especially in large towns. It is a response to the growth in the urban areas of the world. The sprawling of

township further and further away from the core makes the decentralising of the retail function not only a convenience but an absolute necessity.

The rise of the automobile, the rise of suburbs and the rise of the shopping centre are parts of a single phenomenon. Michael Kahn (1978)² identifies 5 forces :-

1. Increasing affluence.
2. Rising residential population and it's suburban spread away from the city centre.
3. Changing travel possibilities and habits.
4. Increasing congestion in the C.B.D.
5. Increasing purchasing power which has led to increasing retail sales, and in particular increasing amounts being spent on speciality goods.

Thus retailing also started to move to the suburbs in pursuit of the purchasing power. So the present day shopping complex necessarily began as an innovation in retail location.

So as travel patterns and buying habits shifted with the rise of the suburbs and the custom of shopping by car, new concentrations of shopping facilities arose away from established C.B.D. and business areas. But there were also new kinds of shopping areas - the narrow and shallow strip commercial lots in business districts and

1 P.H.W. Johnston - "Customer Attraction to Shopping Centres" - Durban 1973

2 Michael Kahn - "A Study of Shopping Centres in Metropolitan Durban" - Durban 1978

along major streets which could not easily accommodate the new concept of shopping with on-site parking. So provision for parking became a necessary adjunct of retail facilities.

Private enterprise responded to this need by devising a complete market-place with its own built in customer parking through a process of growth and innovation in response to this shifting nature of the market. Early development on vacant sites unfolded from a strip of stores fronting on a street into the compact shopping centre complex of today, identifiable by its planning principles, array of tenants, development procedures and operational practices.

2.3 KEY TYPES OF SHOPPING CENTRES

Shopping centres have evolved into three distinct types. They are the neighbourhood, community and regional centres. Each is different in its function. In all cases, even with the variations, the major tenant classification determines the type of shopping centre.

2.3.1 THE NEIGHBOURHOOD CENTRE

The neighbourhood centre is the smallest type of shopping centre. This type of centre provides for the sale of convenience goods (food, drugs and sundries) and personal services - those which meet the daily needs of an immediate neighbourhood trade area. A supermarket is the principal tenant and consumer shopping patterns show that geographical convenience is the most important factor in the shoppers choice of supermarkets. Usually only as a secondary consideration does wide selection of merchandise or services come into play.

"Dollars and Cents of Shopping Centres : 1981" lists the types of tenants usually found in a neighbourhood centre:

	<u>Rank</u>
<u>FOOD</u>	
Supermarket	2
<u>FOOD SERVICE</u>	
Restaurant without liquor	7
Restaurant with liquor	3
Fast food/carryout	8
<u>CLOTHING</u>	
Ladies ready-to-wear	5
<u>HOME APPLIANCES/MUSIC</u>	
Radio, T.V. and Hi-fi	18
<u>GIFTS/SPECIALITY</u>	
Cards and gifts	14
Decorative accessories	20
<u>JEWELLRY AND COSMETICS</u>	
Jewellery	15
<u>LIQUOR</u>	
Liquor and wine	13
<u>DRUGS</u>	
Drug	9
<u>OTHER RETAIL</u>	
Other retail	4
P	
Beauty	1
Barber	12
Cleaner and dyers	6
Laundry	17

	<u>Rank</u>
<u>FINANCIAL</u>	
Banks	19
Savings and loans	16
Real Estate	10
<u>OFFICES (OTHER THAN FINANCIAL)</u>	
Medical and Dental	11

2.3.2 THE COMMUNITY CENTRE

This type of centre is built around a junior department store or variety store as its major tenant, in addition to a supermarket. Such a centre does not have a full-line department store. The centre offers shoppers greater depth and range of merchandise than does the convenience centre.

The most common types of tenants as listed by "Dollars and Cents of Shopping Centres : 1981"

<u>GENERAL MERCHANDISE</u>	<u>Rank</u>
<u>GENERAL MERCHANDISE</u>	
Junior department store	17
<u>FOOD</u>	
Supermarket	2
<u>FOOD SERVICE</u>	
Restaurant without liquor	9
Restaurant with liquor	5
Fast food/carry-out	7
Ice-cream parlour	19

	<u>Rank</u>
<u>CLOTHING</u>	
Ladies speciality	16
Ladies ready-to-wear	1
Mens wear	8
<u>SHOES</u>	
Family shoes	3
<u>HOME APPLIANCES/MUSIC</u>	
Radio, T.V. and Hi-fi	11
<u>HOBBY/SPECIAL INTEREST</u>	
Sporting goods	20
<u>GIFTS/SPECIALITY</u>	
Cards and gifts	6
Books and stationery	14
<u>JEWELLRY AND COSMETICS</u>	
Jewellery	10
<u>OTHER RETAIL</u>	
Other retail	12
<u>PERSONAL SERVICE</u>	
Beauty	4
<u>FINANCIAL</u>	
Banks	15
Real estate	18
<u>OFFICES (OTHER THAN FINANCIAL)</u>	
Medical and Dental	13

2.3.3 THE REGIONAL CENTRE

This type of shopping centre provides shopping goods, general merchandise, apparel, furniture and home furnishings in full depth and variety. It is built around the full-line department store as the major draining power. For even greater comparative shopping two department stores - even three or more - are being included among the tenancy.

Regional and super-regional centres establish their customer drawing power from their ability to offer full ranges of shopping facilities and goods. They are the largest types of shopping centre - they are also the glamour centres. They come closest to reproducing shopping facilities and customer attraction once available in C.B.D's.

The tenants most frequently found in Regional shopping centres as outlined in "Dollars and Cents of Shopping Centres : 1981"

	<u>Rank</u>
<u>GENERAL MERCHANDISE</u>	
Department store	10
<u>FOOD</u>	
Candy and nuts	19
<u>FOOD SERVICE</u>	
Restaurant with liquor	13
Fast food/carry-out	4

RankCLOTHING

Ladies speciality	6
Ladies ready-to-wear	1
Mens wear	2
Unisex/jean shop	7
Special apparel/unisex	20

SHOES

Family shoes	3
Ladies shoes	9
Mens and boys shoes	15

HOME APPLIANCE/MUSIC

Radio, T.V. and Hi-fi	12
Records and tapes	18

GIFT/SPECIALITY

Cards and Gifts	8
Books and stationery	11
Decorative accessories (Including hardware	17

JEWELLRY AND COSMETICS

Jewellery	5
-----------	---

PERSONAL SERVICE

Beauty	14
--------	----

FINANCIAL

Banks	16
-------	----

2.3.4 HYPERS

To these generally accepted types of shopping centres must be added the new and specialised shopping developments of

the Superstore or Hypermarket. They are an advanced form of convenience shopping. They provide merchandise, which are normally convenience purchases in such a way as to reduce effort in selection and encourage bulk buying.

The Hypermarket is essentially one store concentrating on convenience and routinely bought durable goods and without the comparison opportunity.

2.4 TRADE AREAS OF A SHOPPING CENTRE

David L Huff suggests an equation →

"a retail centre's drawing power is directly proportional to its size and unversely proportional to the customers travel time to the centre" ¹

Goldstucker et al ² put forward some major factors which they feel influence the size of the retail trading area.

1. Existing competitive alignment.
2. Population density.
3. Acesibility.
4. Image of the centre.
5. Location of the centre.

1 David L Huff "Do Merchants understand why customers shop at their stores" - Shopping Centre World, Atlanta 1981.

2 Goldstucker, Bellenger, Stanley and Otte "New Developments in Retail Trading Area Analysis and Site Selection.

There are three commonly known trade areas from which a shopping centre attracts patronage:

Firstly there is the primary zone which is the geographical area from which the centre will derive its greatest share of recurring sales. The zone generally extends 3 - 5 miles from the site and is usually no more than a 8 - 10 minute drive.

Secondly there is the secondary zone/s - which depending on population concentrations and locations of existing centres, several of these zones can be drawn. It generally contains the potential growth area and extends 3 - 7 miles and is no more than 15 - 20 minutes drive.

Thirdly there is the Tertiary zone/s which are the outermost ring in the trade area, and usually extends 15 miles in major metropolitan markets and as far as 50 miles in smaller markets.

Consequently shopping centres should be spatially distributed so that their trade areas are complementary and not competing, particularly with regard to the primary area. Variations in spacing will occur with differences in population density, spending power and mobility.

The importance in defining a shopping centre's trade area was manifested by the development of trade area research, which is a specialised form of market research to geographical patterns - or more specifically to the shopping centres trade area. It consists essentially of defining the trade area - where the customers are coming from - and developing a profile of customers and their shopping patterns, attitudes and opinions about

3.0 THEORETICAL REVIEW

This is basically an outline of certain general theoretical notions that cover a wide range of areas in the marketing of shopping centres.

3.1 MICRO APPROACH

Frank Marshall (director of advertising and public relations at Long Islands South Shore Mall) is quoted as saying

"All I can tell you is that in order to understand this business you have to make every effort, every endeavour to understand people one of the worst things you can do is foster the wrong image to your market, and image is the final seducer that forms the basis for motivation and response." ¹

It has often been suggested that the psychological and attitudinal differences of consumers are more important in defining trading areas than income and socio-economic variables. Consumers hesitate to shop in malls that are not known to them but on the other hand, if a centre is blessed with a good image consumer will go out of their way to patronise its units.

Pierre Martineau has speculated that

".... shopping is a womans equivalent of a man's hunting trip. It is a spree or binge when she can let herself go and be herself. It is a micarious enjoyment of higher status. It is a woman's way to wield power which is denied her in typical husband - wife relationships, where she is forced into a subordinate rile. In

1 Communication Channels Inc. - "Frank Marshall - The Scientific Selling of Centres" - Shopping Centre World Atlanta, 1981

shopping she can order people about, be waited, be courted. She is literally 'queen for a day' - flattered and imperious."

To what extent this speculation is valid in today's market with changing markets, shifting female attitudes and life styles is definitely questionable. However if there is any validity the strategy implications for marketing can be very significant.

Bellenger et al, ² in their study on patronage motives maintained that there are basic shopping centre features used by shoppers to evaluate alternative centres:-

FACTORS

KEY VARIABLES

- | | |
|---------------------------------|---|
| 1. Quality of the centre | a) Security
b) Attractive decor
c) Courtesy of personnel
d) Pleasant atmosphere |
| 2. Presence of related services | a) Having a bank
b) Having restaurants
c) Having a movie theatre |
| 3. Variety under one roof | a) Enclosed mall
b) Variety of shops
c) Number of large department stores
d) Presence of new fashions. |
| 4. Convenience (Economic) | a) Convenience to home
b) Easy accessibility |

1 Danny Bellenger, Don Robertson and Barnett Greenberg - "Shopping Centre Patronage Motives" - Journal of Retailings, Volume 53, 1977

2 Ibid

The findings of their study indicated a relationship between desired shopping centre factors and personal characteristics. They suggested that there are two main shopper types. Firstly there is the recreational shopper who wants a high quality centre with extensive variety and a large number of related services. This shopper type expressed a strong positive interest in shopping as a leisure activity. The second type is the convenience, cost-orientated shopper. This economic orientation is expressed both in the desire for convenience and for lower prices. Centre quality, variety and related services are secondary considerations and shoppers showed a negative interest in shopping as a leisure activity.

The implications of these findings for the different centre types are that smaller centres should place more emphasis on the convenience shopper, since physical size results in such centres not being able to offer the variety and atmosphere sought by recreational shoppers. On the other hand the larger community and regional centres should direct their strategy to incorporate the recreational shopper.

3.2 MACRO APPROACH

Peter Johnston¹ maintains that in a shopping centre, the failure of a trader is not his own personal concern, but directly affects the other retailers who are in the centre. The fact is

1 Peter Johnston - "Customer Attraction to Shopping Centres" - Durban 1974 :

that in the centre the whole is more important than the individual parts, but at the same time to get a good whole the parts must be sound.

This idea definitely re-iterates the basic principles of structural functionalism - namely:

- that the whole comes before the parts and that comprehension of any single part is by reference to the larger systematic whole of which it forms a part.
- That understanding a part by referring it to the whole occurs by seeing that part as performing a function for the maintenance of the whole.

Hence the relationship between the parts and the whole is a functional relationship, and probably the most important is that the parts are mutually compatible of each other and this compatibility serves to maintain the whole.

Consequently the greatest competitive strength of a shopping centre is in its unity. Under the leadership of a single landlord such primary and all important areas as tenant mix, store hours, unified merchandising efforts, civic participation and promotions are offered to the public with the effective power of all the centre's tenants working together as a single entity.

The greatest opportunity that a shopping centre's merchant association ¹ has is the establishment of the centre as a focal point of the community it serves. There are centres that have done such a

1 Merchant Association is the tenant group organised to promote the centre through co-operative advertising, public relations activity and community involvement.

fine P.R. job in their communities that the entire area is defined in conversation by the name of the centre. There are shopping centres around which most important community events revolve, and there are shopping centres which are just places to shop. Unfortunately the latter fits most.

3.3 LONGITUDINAL APPROACH

In the words of Frank Marshall

"I think its the beginning of a new outlook in promoting malls and a basic understanding that a mall is a product rather than just a place people go."

Most marketing strategies take into account the fact that products like people have a life cycle. In the product life cycle there are generally four phases

The growth phase is the period when profits/returns increase and are positively correlated with sales as the market begins trying to adopt the product.

The maturation phase is when the product matures and returns for the initiating firms do not keep pace with sales because of competition. It is often at this stage that 'remarketing' of the product is necessary, which involves increasing product quality or expanding outlays on advertising and promotion just to maintain market share.

Finally in the decline phase as the returns start

to decline the seller must at some point in time decide whether to -

1. Drop/sell the product.
2. Alter the product.
3. Seek new uses for the product.
4. Seek new markets.
5. Continue with more of the same.

The usefulness of the product life cycle concept is that it gives the marketing function a long range view of planning. In doing so it should become clear that shifts in phases of the life cycle correspond to changes in the market situation, competition and demand. Thus the marketing function should recognise the necessity of altering the marketing mix to meet these changing conditions.

4.0 RESULTS

4.1 IN-CENTRE SURVEY

The results presented here are taken from data collected from respondents who were interviewed at the Mutual Square shopping centre. Hence these results are a reflection of the types of shoppers and their attitudes who are presently making up the patronage to Mutual Square.

4.1.1 ORIGIN OF SHOPPERS

Table 1 shows the distribution of respondents from the different areas from which they originate.

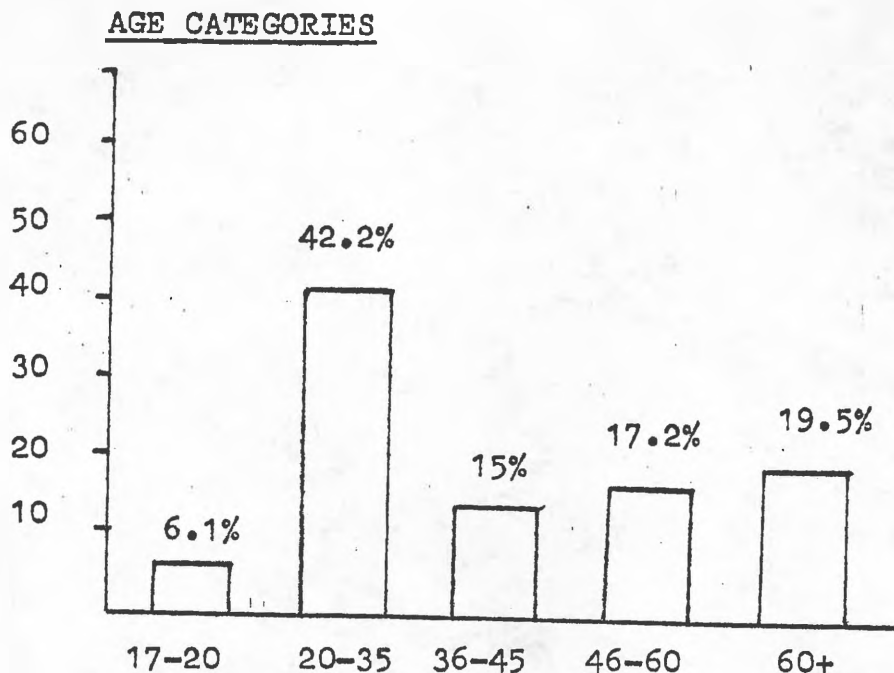
ZONE	RESIDENTIAL AREA	DISTRIBUTION %
Primary Zone	Glenwood	60 (n=54)
Secondary Zone	Berea Umbilo Glenmore Manor Gardens Morningside	18,9 (n=17)
Tertiary Zone	Westville Kloof Montclair Durban North Chatsworth Hawardene Forrest Hills Carrington Heights	(n=19)

As is expected the highest proportion of people frequenting the centre originate from the primary zone. It is interesting to note, however, that there is a higher percentage of people coming to the centre from the tertiary areas than from the secondary areas. This would possibly indicate the presence of the numerous competing shopping centres in the secondary area are capturing the trade.

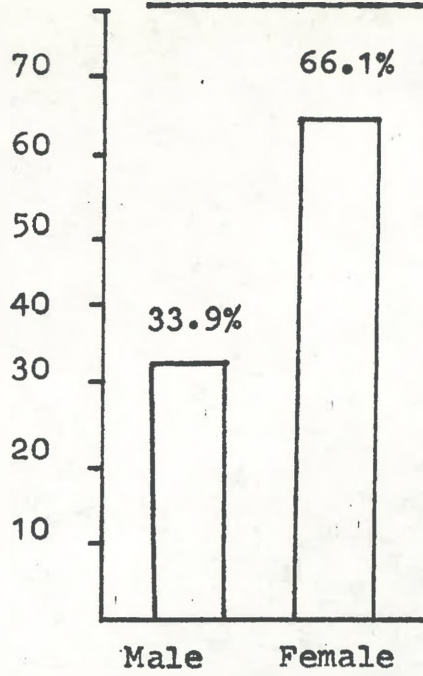
4.1.2 SHOPPER PROFILE

The shopper profile is a detailed breakdown of census information of the people visiting Mutual Square

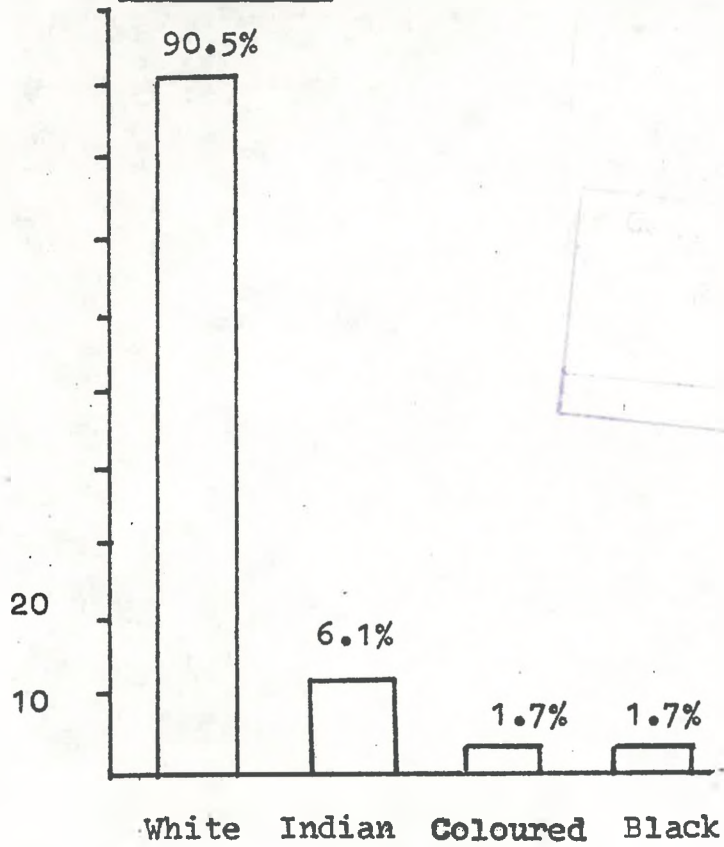
GRAPHIC ILLUSTRATION OF PROFILE



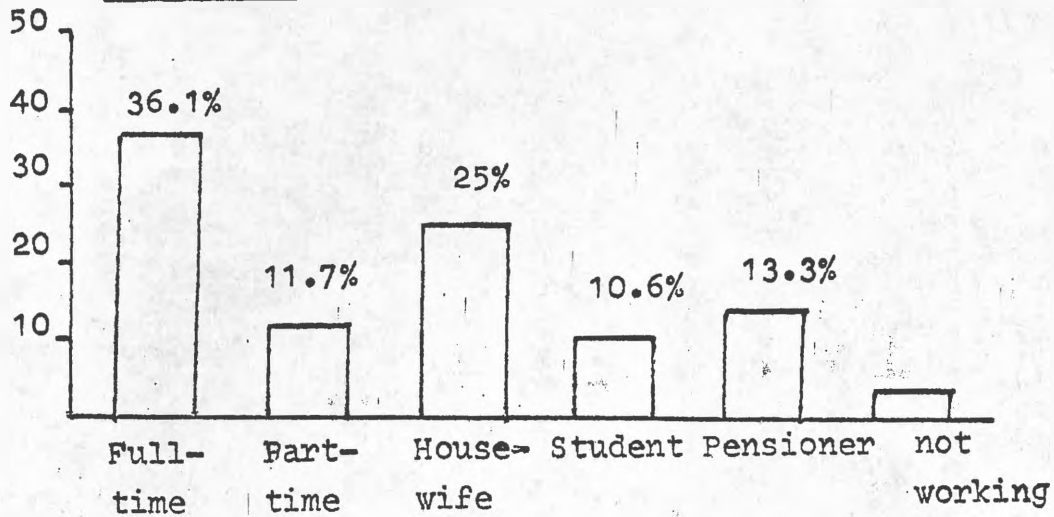
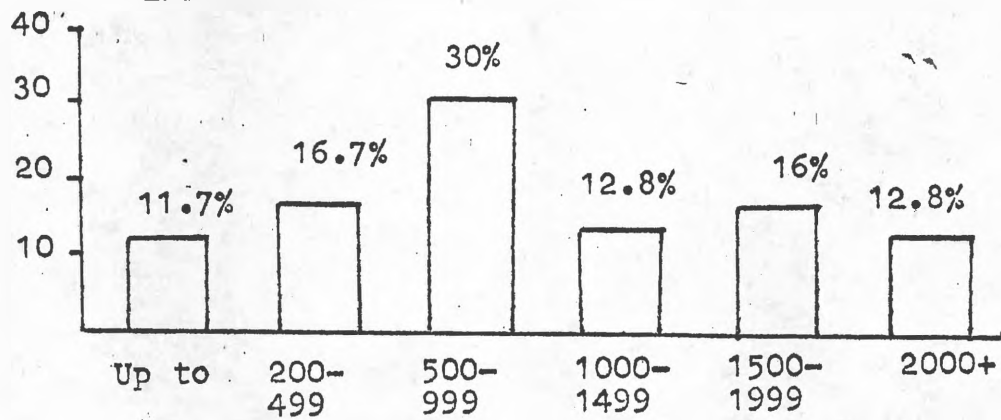
SEX DISTRIBUTION



RACE GROUPS



N-299

OCCUPATIONAL STATUSHOUSEHOLD INCOME

Looking into this information in more depth the profile becomes more meaningful.

The largest proportion of shoppers came from the primary area (60%). These shoppers are essentially made up of housewives, students and pensioners. In considering the occupational status of the primary area shoppers :-

- 60,9% of the housewives in the sample are from the primary area.
- 90,9% of students are from the primary zone.
- 92,3% of pensioners are from the primary zone.

Hence the students and pensioners that visit Mutual Square are almost exclusively from the immediate area.

Table 2

OCCUPATIONAL STATUS

<u>RESIDENTIAL</u> <u>ZONE</u>	Employed Full- time	Employed Part- time	House- wife	Student	Pensioner	Not Work- ing	
Primary (n =	16.7% 9	13.0% 7	25.9% 14	18.5% 10	22.2% 12	3.7% 2	54
Secondary (n =	35.3% 6	29.4% 5	23.5% 4	5.9% 1	5.9% 1	- -	17
Tertiary (n =	57.9% 11	15.8% 3	26.3% 5	- -	- -	- -	19
	26	15	23	11	13	2	90

Looking at the section of the sample that is employed full-time, the highest proportion is coming from the tertiary areas (even more than from the primary area). The reason for this is that the commercial/light industrial area of Umbilo is situated in such close proximity to the centre. This makes shopping at lunch times very convenient for workers in the area as well as probably serving a recreational function. The latter idea is supported by the fact that 15.8% of the respondents from the tertiary zone said they visited Mutual Square just as a place to come and browse over their lunch hour.

It is interesting to all that there is a fair proportion of housewives coming to the centre from the tertiary zones which would indicate that Mutual Square does have some attraction or drawing power other than the convenience factor. The lower percentage of housewives from secondary area would indicate that they are shopping at other centres which are situated in closer proximity.

Table 3

HOUSEHOLD INCOME

<u>RESIDENTIAL ZONE</u>	Up to R200	R200 - R499	R500 - R999	R1000 - R1499	R1500 - R1999	R2000+	
Primary (n =	20.4% 11	R31.5% 17	20.4% 11	7.4% 4	13.0% 7	7.4% 4	54
Secondary (n =	5.9% 1	11.8% 2	17.6% 3	23.5% 4	29.4% 5	11.8% 2	17
Tertiary (n =	5.3% 1	5.3% 1	31.6% 6	10.5% 2	10.5% 2	36.8% 7	19
	13	20	20	10	14	13	90

Looking at the average household income, people from the primary area are essentially focussed in the lower income group (with 51.9% having a household income of less than R500 per month). This large proportion in the lower income section is due to the high percentage of pensioners and students which form a large part of the sample from the primary zone. Shoppers from the tertiary zones have the highest proportion of respondents in the upper income group i.e. R1500+. This being due to the number of working people that form part of the tertiary zone profile.

Overall then, the shopper profile indicates patronage of Mutual Square by a diverse market. Patronage from housewives, pensioners and students is essentially from the immediate primary area, whereas the working people tend to originate from the secondary and tertiary zones.

4.1.3 PATRONAGE OF THE CENTRE

Patronage to Mutual Square is reflected in such factors as frequency of trips, reasons for visiting the centre and where respondents do most of their regular shopping. (See Table 4)

Table 4FREQUENCY OF VISITS

<u>RESIDENTIAL</u> <u>ZONE</u>	Once a week	Several times a month	Every few months	First Visit	
Primary n =	22.6% 50	3.7% 2	1.9% 1	1.9% 1	54
Secondary n =	70.6% 12	29.4% 5	-	-	17
Tertiary n =	57.9% 11	15.8% 3	26.3% 5	-	19
	73	10	6	1	90

In straight frequency an overwhelming majority of 81.1% (n = 73) of the respondents have visited the centre at least once a week. Overall the centre is frequented on a regular basis by most shoppers - particularly those from the primary zone. The highest proportion of respondents that only visited the centre every few months came from the tertiary zone which is made up largely of working people.

In considering the reasons why respondents visit Mutual Square the most notable were :-

- Convenience : 70%
- Checkers : 89%
- For a particular shop/
service in the Centre
(other than Checkers) : 10%

Convenience was the most popular reason from all respondents, particularly from respondents from the primary zone.

Intrestingly those respondents who visited Mutual Square for a particular shop/service (other than Checkers) came mainly from the secondary and tertiary areas - this indicating that Mutual Square does have some attracting tenants other than Checkers and the convenience aspect.

Table 5

REASONS FOR VISITING

<u>RESIDENTIAL ZONE</u>	Convenience	Checkers	Particular Shop/ Service
Primary	79.6%	9.3%	7.4%
Secondary	52.9%	5.9%	17.6%
Tertiary	57.7%	10.5%	10.5%

Reasons such as pleasant shopping conditions and variety of shops were only mentioned in 1 or 2 cases.

Looking at the different types of shopping done at Mutual Square - food shopping is the most popular. A majority of 63% (n = 67) of respondents claimed to do most of their regular food shopping at Mutual Square with 12.2% (n = 11) shopping at Berea Centre and 12.2% (n = 11) shopping at one of the Hyperstores. It is mainly the primary and secondary zone

shoppers that patronise Mutual Square for regular food, whilst the tertiary shoppers show a preference for the Hypers.

As far as shopping for clothing goes, Mutual Square is not very popular - 12.2% (n = 11) doing their regular clothing shopping at the centre. Of this 12.2%, 91% are over the age of 35 years. Looking at the shopper profile this indicates that the present clothing stores in Mutual Square as missing part of the market viz. under 35 age group. Shopping in the C.B.D. was by far the most popular - 53.3% (n = 48). This is obviously due to the far greater variety and competitive prices offered in C.B.D. What should be noted here is that 11.1% of the respondents maintained that they either did not buy clothing anymore due to their age, or that they made their own.

Regarding other comparisons shopping in hardware and furniture the highest number of respondents shop in the C.B.D - 38.9% (n = 35), because of the competitive prices between large retailers like Game and O.K. Bazaars. Mutual Square is patronised by 15.6% (n = 14) of respondents for regular hardware purchases. A notable competitor is that of Wardkiss situated just below Umbilo Road - 21.1% (n = 19) of respondents shop there on a regular basis.

What should be notes, is that comparison goods are not bought on a regular basis and tend to be subject to seasonal and economic fluctuations.

Overall then, patronage to Mutual Square is essentially a weekly convenience basis - particularly from primary zone shoppers. In keeping with this food shopping commands the most notable patronage with a relatively poor support of fashion and comparison shopping.

4.1.4 GENERAL ATTITUDES TO THE CENTRE

The overall attitude of shoppers towards Mutual Square was favourable, with most respondents feeling that the centre is lacking nothing.

Here is a breakdown of responses received in response to the question "Are there any shops or services lacking at Mutual Square?"

	<u>%</u>	<u>N</u>
Centre has everything	54.4	49
Not aware of all the shops	1.1	1
Woolworths	2.2	2
Game	1.1	1
Men's shop	1.1	1
Clicks	3.3	3
Furniture store	3.3	3
Restaurant	2.2	2
Material shop	2.2	2
Book exchange	1.1	1
Post office	8.9	8
Municipal office branch	1.1	1
Library	3.3	3
Centre needs cleaning	6.7	6
Checkers needs cleaning	1.1	1
Toilets	1.1	1
Tote	1.1	1
Other	4.4	4
	<u>100%</u>	<u>90</u>

It is interesting to see here that a couple of the suggestions made are for shops that already exist in the centre (i.e. restaurant, material shop). This perhaps indicates that the present stores are not catering for needs.

When the suggestions have been regrouped:-

Centre has everything	54.4%
Chain stores	7.8%
Other general stores	13.3%
General services	15.6%
Complaints	8.9%

These results show that the highest frequency of suggestions fall into the services category i.e. Post Office, Library, Municipal branch. This seems to indicate a leaning toward making Mutual Square more of a convenience centre.

4.1.5 SYNOPSIS

Overall the results presented so far give a fairly representative picture of Mutual Square's present shoppers and their general shopping trends.

Mutual Square is by no means an unpopular or 'quiet' centre and criticism of the centre tends to be minimal. The types of shoppers frequenting Mutual Square can be categorised into 2 main sections, namely those coming from the primary zone (which are made up largely of students, pensioners and housewives) and those that come from the secondary and tertiary zones (which are mainly working people and housewives).

Mutual Square is frequented to a large extent for its convenience factor both for residents living in the immediate area and for people who work in the area. In addition a fair proportion of shoppers (mainly from the secondary and tertiary areas) visit Mutual Square for a particular shop or service it has to offer, other than Checkers. This indicates that Mutual Square does have other

attractors besides its location and supermarket.

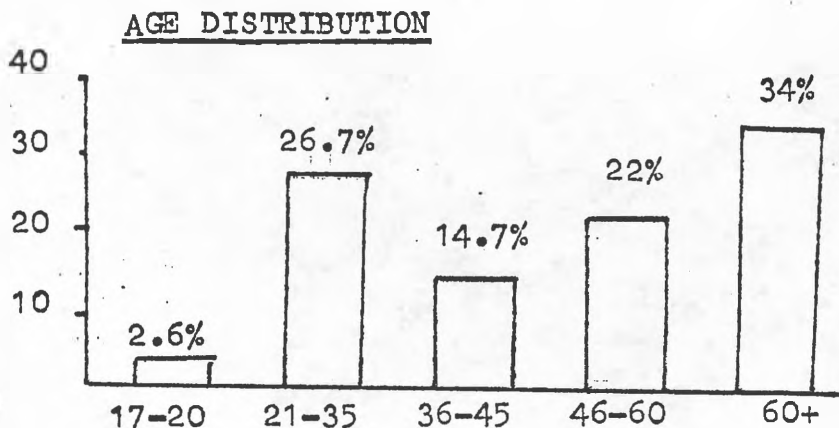
The centre is most popular with regard to food shopping, however this I believe is a constant factor with most shopping centres because food is a basic necessity in everyday life, whereas clothing, furniture and hardware are 'need' purchases and tend to be seasonal. As far as any suggestions go for additional shops/services at Mutual Square, the large majority of shoppers feel that their needs are adequately catered for.

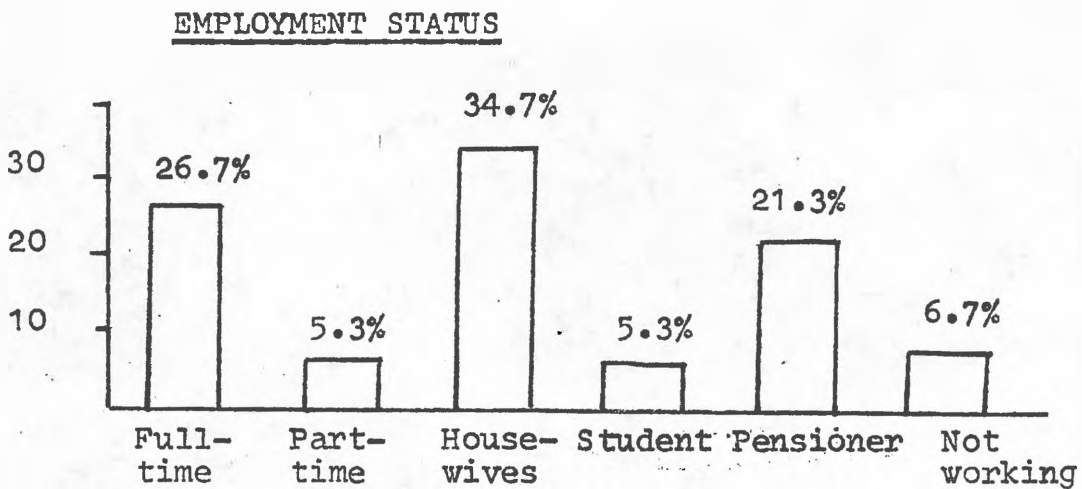
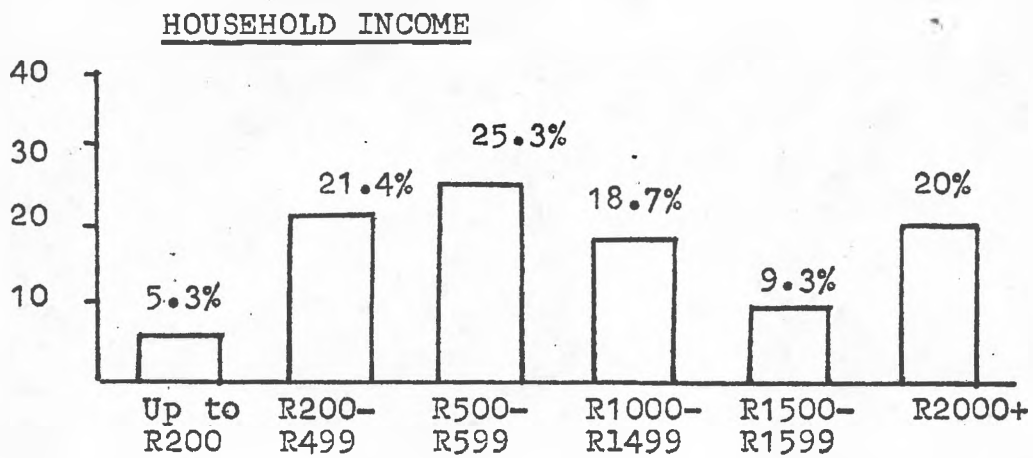
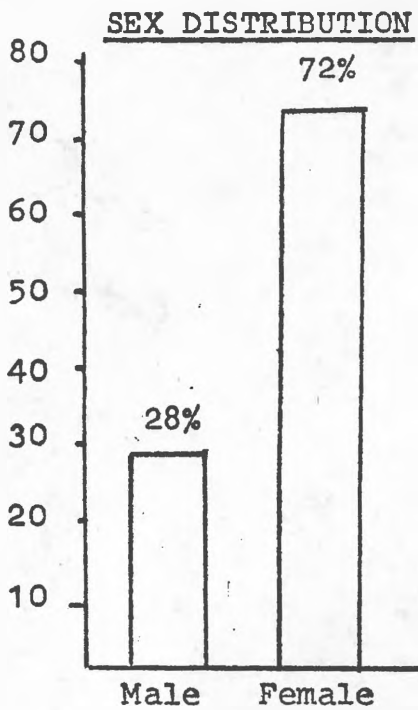
4.2 PRIMARY AREA DOOR-TO-DOOR SURVEY

The results presented here are taken from a door-to-door survey done in the primary catchment zone around Mutual Square. Hence these results show the attitudes and types of people that represent Mutual Square's primary potential market.

4.2.1 SHOPPER PROFILE

GRAPHIC ILLUSTRATION OF PRIMARY AREA PROFILE





The profile in more detail emphasizes the following characteristics :-

Considering the employment status of the sample, housewives and pensioners form a significant section - 56% (n = 84). This correlates with the in-centre survey sample that originates from the primary area. I would like to point out here that students only form 5.3% (n = 8) of the sample, the reason for this being that the official student residences in the area were not sampled. Had the University and Technikon residences situated in the primary area been taken into consideration the percentage of students would have been more in line with that found in the in-centre survey (91% of the students from the in-centre survey were from the primary area).

In addition there is a higher percentage of working people in this sample than in the in-centre primary area sample - this being due to the fact that respondents were questioned in their homes at varying times and on varying days (including week-ends) and not in the centre during shopping hours.

Looking at the age categories the 20-35 years and 60+ years have the highest concentrations and this fits in with the fact that pensioners and housewives form a significant section of the sample. (These distributions are proportionately the same as those found in the in-centre survey from the primary zone.

The average household income shows that 44% (n = 66) of the sample are in the middle income bracket i.e. R500 - R1499 per month. The rest of the sample is pretty evenly distributed between

the lower income group (26.6% (n = 40) earn less than R500 per month) and upper income group (29.3% - n = 44 - earn R1 500+ per month). This income distribution is very representative of the residential area of Glenwood i.e. with very expensive properties in the Ridge Road/Lamont Road area near the University ; low cost properties around Umbilo Road/Gale Street area ; and average middle market properties around Manning Road area which forms the bulk of the demarcated primary area.

The largest percentage of respondents have a household size of one or two people - 50.7% (n = 76).

Overall then, the profile of the primary market area is much the same as that part of the in-centre sample representing the primary zone, thus reinforcing the target market's shopper profile.

4.2.2 PATRONAGE TO THE CENTRE

The large majority of respondents in the primary area have visited Mutual Square at some stage or another (97.5% - n = 146).

Looking at the frequency of trips to the centre:-

Never visited	2.7%	(n = 4)
At least once a week	74.7%	(n = 112)
Several times a month	8.6%	(n = 13)
Every few months	14.0%	(n = 21)

Thus the largest proportion of people visit Mutual Square on a regular basis. It is interesting to note that a fair proportion of people only visit the centre every few months - this appears to

indicate that these people are making their regular trips elsewhere.

Once again the most popular reason for visiting Mutual Square is the convenience factor - 42% (n = 63). Other prominent reasons were:-

Checkers	34.0%	(n = 51)
For a particular shop/service (other than Checkers)	13.3%	(n = 20)

Of interest here is the smaller percentage of people using Mutual Square as a convenience centre than in the in-centre survey. An explanation here is that some of the people in the primary area are actually physically closer to Berea Centre, Buxtons Village or Musgrave Centre than they are to Mutual Square. So here the attracting power of Checkers is much greater than in the in-centre survey, and combined with the attraction of other specific shops/services at the centre there is overall a majority of people visiting the centre for a particular reason rather than for convenience.

Once again, in this survey results show that Mutual Square is most popular with regard food shopping.

Mutual Square	51.3%	(n = 77)	} n = 66
Berea Centre	15.3%	(n = 23)	
Buxtons Village	14.0%	(n = 21)	
Musgrave Centre	14.7%	(n = 22)	

These results show that most people use the Checkers at Mutual Square to do food shopping. However the majority is very small. There is a large portion of the primary market that are going to other centres in the area to do regular food shopping (44%). What it essentially boils

down to is not so much competition between the centres as such but competition between the major chain supermarkets i.e. Checkers, Pick 'n Pay, O.K. Bazaars, Spar Foodliner.

What is of interest here is that of those people who do their regular food shopping at Buxtons Village, 57.1% fall into the R1 500+ income group. This is probably because the prices at Buxtons are higher than the other chain stores and are aimed at the more discerning buyers looking for quality and personal service. Musgrave Centre tends towards the middle to upper income groups and both Mutual Square and Berea Centre tend to be patronised by the lower and middle income groups.

Mutual Square has a poor patronage for clothing shopping - 9.3% (n = 14). Here again preference for clothing shopping is the C.B.D. where there is greater variety and competitive prices (53.3% - n = 80). Musgrave Centre also emerged as a popular place to shop for fashion goods (18.7% - n = 28). This is largely because of the variety of clothing stores including branches of John Orrs and Edgars, chain fashion stores (Truworths, Miladys). Those respondents who favoured shopping at Musgrave Centre are largely focussed in the upper income group, whereas patronage at Mutual Square is from the lower and middle income groups.

4.2.3 PATRONAGE TO MAIN COMPETING CENTRES

By far the most popular centres visited, other than Mutual Square were Berea Centre, Buxtons Village and Musgrave Centre.

- 1 BEREA CENTRE - is situated right on Berea Road which acts as a major throughfare between suburbs

and the C.B.D. Of the sample 35.3% (n = 53) maintained that they visited Berea Centre as well as Mutual Square. Here is a breakdown of the frequency of visits :-

17.3%	(n = 26)	visit at least once a week
12.0%	(n = 18)	visit several times a month
6.0%	(n = 9)	visit every few months
<u>35.3%</u>	<u>(n = 53)</u>	

The most popular reason for visiting Berea Centre is for Pick 'n Pay and O.K. Bazaars as well as the convenience factor.

Berea Centre does not generally have a public image bestowed on it, like Musgrave Centre and that which Buxtons Village is fast acquiring. Overall it has most things that makes shopping there convenient, but it is not a centre that stimulates people to browse around.

It is difficult to asses who the target market is for this centre. It has a few odd shops aiming at the upper income shoppers and other discount shops. Essentially however, the centre is patronised from the middle/lower income section of the area.

2. BUXTONS VILLAGE - formerly known as Glenwood Centre is situated on Moore Road. The centre has recently been bought by the Buxton family who now have a specific plan for the centre.

Of the sample 36% (n = 54) claimed that they visited Buxtons Village as well as Mutual Square. The frequency of visits show that 23.3% (n = 35) visit at least once a week and 10.7% (n = 16) visit several times a month. By far the most

overwhelming reason for visiting the centre was for the Buxtens Spar supermarket. The supermarket is geared toward the more discerning shopper who doesn't mind paying a little extra for good quality and service. Hence Buxtens is aiming at a particular section of the population, namely the upper income groups. Mr Buxton has it in mind to turn the centre into one which exudes the image and atmosphere created by Buxtens itself.

Consequently Mr Buxton has decided on the orientation that the centre will take and who his target market will be. He hopes to make the centre exclusive with a particular orientation toward speciality food stores.

- 3 MUSGRAVE CENTRE - is a popular centre with a well established reputation throughout the greater Durban area. Of our sample 44.7% (n = 67) visit Musgrave Centre in addition to Mutual Square. The most popular reason for visiting Musgrave is for a particular store. In this instance it is not only the chain supermarket, Pick 'n Pay, that attracted people but also John Orrs, Edgars and in some instances a particular boutique. Another factor was also the variety of the shops.

There is no doubt as to what orientation the tenant mix has. With its seventeen fashion/clothing shops ranging from very exclusive boutiques to general chain fashion shops and departmental stores, the fashion variety is enormous. In addition, Musgrave Centre has a host of comparison type stores, most of them very expensive and exclusive. An example is that the centre hosts three jewellery stores, two of which are exclusive designer brand outlets.

The market at which the tenant mix is aimed, is

definitely the upper-middle income groups which are characteristic of the immediate area around the centre. In addition it is aimed at the female section of this population, since it is they who have the time and money to spend at the centre.

Overall then, Musgrave Centre and Buxtons Village are gearing their centres toward a particular section of the market - people with time and money to spend there. Musgrave Centre orienting toward fashion and luxury stores and Buxtons toward food. Berea Centre on the other hand, has no particular direction toward merchandise or market. This is similarly the case with Mutual Square.

4.2.4 GENERAL ATTITUDES TO THE CENTRE

Shops and services lacking at Mutual Square

When respondents were asked if they felt there were any shops or services lacking at Mutual Square the responses were as follows :-

<u>Never visited</u>	2.0%
<u>Centre has everything</u>	48.0%
<u>Chain Stores</u> (Clicks, Pick 'n Pay, Woolworths, Departmental Store etc)	10.0%
<u>General Stores</u> (Furniture Shop, Baby Shop, Toy Shop, Children's Clothing etc)	15.7%
<u>Unaware of all shops</u>	2.1%

Services

(Post Office, Library, Toilets,
Tote, Bank, Book Exchange 14.8%

Complaints

(Centre needs cleaning, Checkers
needs cleaning, better parking needed) 7.4%

These results show that most people are satisfied with what Mutual Square has to offer. These frequencies are much the same as those recorded in the in-centre survey, namely a fair demand for convenience services and general stores that would make one stop shopping easier at Mutual Square.

4.2.5 SYNOPSIS

The profile of the primary market area indicates a fairly complete distribution of people regarding occupations, incomes and age categories, which is a good representation of the Glenwood area. Of this primary market it appears that Mutual Square has most of its popularity amongst the lower and middle income groups.

The results indicate that Mutual Square is visited on a regular basis by the major proportion of the sample. In this case the convenience factor is not so prevalent, but rather visiting for a particular shop or service.

Consideration of opposition centres within the immediate area, seems to indicate quite a competitive environment, particularly with reference to peoples food shopping. This competitiveness seems to exist to a greater extent between the anchor supermarket stores (i.e. Checkers, Pick 'n Pay,

O.K. Bazaars, Buxtons Spar Foodliner) rather than between the actual centres themselves.

On the whole Mutual Square is fairing pretty well considering that it is a small centre with no speciality orientation. However, indications are, that if the centre is left as is, erosion of the primary market will continue. Special attention needs to be given to the complaints that have been made, namely :-

1. Parking and Traffic Flow.
2. Image of Centre (Cleanliness)
3. Image of Checkers (Cleanliness)

5.0 REVIEW OF FINDINGS AND THEORY

The motivation underlying this study concerned the assesment of Mutual Square in its competitive retail market, with particular concern to the declining performance of the centre as a viable product.

Immediately empirical evidence reflects the declining market of the centre by the distribution of the shoppers' origins. The unnaturally higher patronage from the tertiary area than the secondary areas indicates the attraction of other centres situated in that area. In addition, the patronage from the primary market (60%), which is supposedly the biggest market of a shopping centre, is not particularly high considering that Mutual Square is merely a neighbourhood centre and it is not visited exclusively by primary market shoppers.

The greatest competition to Mutual Square comes from Buxtons Village, Berea Centre and Musgrave Centre, with special emphasis on the food shopping market. Musgrave Centre has a distinct advantage over the other centres in that it is one of two shopping centres in Greater Durban area that is of community centre size and hence the variety and attractiveness of the centre is far greater. In addition, due to its greater size (in leasable area) Musgrave Centre has been able to gear its tenant mix to project a particular image and other greater variety. The other shopping centres by sheer lack of physical size are unable to do this.

In terms of the micro-approach to shopping centre patronage, Mutual Square is a centre geared toward the convenience and economic shopper, since as empirical results have shown the major attraction of the centre is its convenience and easy acessibility factor. Factors such as the quality of the centre, variety and prescence of related services do not serve as a great pulling force. Musgrave Centre on the other hand has the factors to attract both the convenience shoppers, as well

as providing the necessary speciality and variety to satisfy the leisure shopper. In addition Musgrave Centre is blessed with a very good image and hence people will go out of their way to patronise it.

As Frank Marshall ¹ put it "you have to make every effort to understand people". Here the understanding of the shopper profile serves as vitally important in the consideration of marketing a centre. Mutual Square's shopper profile indicates that it is to a large extent capturing the lower end of the market particularly in the primary area. In addition there is the identification of tertiary area market of working people who are slightly more up-market. So in terms of those people who are the present market of the centre, any marketing strategy should ensure not to enstrange their patronage, rather to enhance it. Thus the housewives, pensioners and students should be of primary concern.

The orientation of the other competing centres is also of prime importance in considering any strategy for the centre. Hence Musgrave Centre and Buxtons Village are both aimed at the upper end of the market, each with a different orientation. Berea Centre on the other hand seems to have much the same market as that of Mutual Square. The key consideration for Mutual Square is to find a position in that market that is complementary to surrounding centres rather than competitive.

The only way to create a strategy for Mutual Square is by considering the impact of the whole centre, an an entity, as a product. As indicated in the macro-approach the greatest strength of a shopping centre has in the unity of the tenants. The empirical findings of the surveys indicate that there is little wrong with the shops and services offered at Mutual Square, yet the market share of the centre is being continually eroded. This indicates the need to perhaps re-organise the

1 Op. Cit., Pg 21

marketing strategy of the centre in order to maximise the impact of the merchandise being offered. Hence it is not only such factors as physical reorganisation, but also aesthetic improvement (e.g. image) that is vital.

Considering Mutual Square as a product - it has definitely entered the decline phase of the product life cycle. From a centre that once dominated the suburban retail scene, Mutual Square is now essentially a convenience centre that is used for everyday essentials. It is not used for any kind of comparison shopping, although there are a few comparison tenants. In terms of the options open to the product at this stage of its life cycle, the most obvious would be to "alter the product". There is simply no possibility of dropping the product, or changing its use. The possibility of seeking new markets in an already oversaturated retail environment is not practical as is the option of letting the centre continue to run downwards.

Hence in terms of the general theoretical notions substantiated by empirical indications, all directions point toward the need to "do something" about Mutual Square in order to put it back on the road to making it a viable product. As a shopping centre it is only meeting the minimum standards. With the increasing sophistication and competitiveness of suburban retailing, the marketing of Mutual Square needs to attend to the accompanying factors that are all important in the shopping centre industry.

6.0 CONCLUSIONS AND RECOMMENDATIONS

Mutual Square is by virtue of its physical size and its tenant mix is a neighbourhood shopping centre as outlined in "Dollars and Cents"¹. It is used largely as a convenience centre by the people who live and work in the area. In the face of great competition Mutual Square is fairing relatively well, although there are definite signs of market erosion in the primary area. It is here that a well planned promotional strategy and new image and definite direction for the centre is essential to revive interest, retain the existing shoppers and increase the centre's market share in the face of competition in the primary area.

It is also essential to note that the shopper profile of Mutual Square's present shoppers and of the primary market area is essentially middle class, and incorporates a diverse cross-section of people. Considering the orientation of competitors Buxtons Village and Musgrave Centre toward the upper income section of the market, it seems only practical that Mutual Square should concentrate its efforts toward maintaining and increasing the middle and lower income sections of the market.

Considering recommendations for improvement to Mutual Square, the weather aspect of the centre tends to discourage the recreational use of the centre and browsing when the weather is not fine. Also in respect of promotional activities, the weather hampers the success and limits certain activities. Any kind of rectification of this situation would immediately improve the effectiveness of promotions in the centre as well as stimulating an atmosphere more conducive to browsing shopping, rather than just convenience or specific buying.

1 Op. Cit., pg 13

The complaints mentioned also need to be considered and overcome. This means that the parking problem and traffic flow are studied and improved. The cleanliness of the centre leaves much to be desired. This is a result of the centre being open to the elements and the condition and type of flooring existing at present. Checkers being the major anchor needs to consider re-vamping and streamlining the cleaning of the store in order to overcome the adverse comments made about their store.

Following on from this is the need to consider the positioning of tenants in the centre. At present there is no coherent arrangement of tenants throughout the centre. A more effectively arranged tenant mix will give shoppers a better idea of what shops and services are available to them. Possibly the best idea here is the grouping of similar types of shops as close together in the centre as possible e.g. all the fashion stores in one area, all the food orientated stores in another area and so on. (See Diagram 6.1)

Attention should be given toward an effective promotional campaign since it promotes the image of the centre as well as making the public more aware of the shops and services available at the centre. There should be emphasis on community promotions to enhance the image of Mutual Square in the area. Things like the 'Pensioners' Club' are essential considering that pensioners make up a fair proportion of the primary market area. Along the same lines the involvement of students in promotional activity is an extremely good idea considering the location of Natal University and the new Natal Technikon right within the primary area. With the large concentration of students in the area any community promotions for their benefit would put Mutual Square one step ahead in capturing an even greater percentage of this market.

In this way Mutual Square can find a position in the overall market that will revive it as a viable investment to both the parts and the centre as an entity.

Diagram 6.1

SUGGESTED LAYOUT OF SHOPS

-  Food and Drink
-  Luxury
-  Fashion
-  Convenience Service



APPENDICES

IN-CENTRE SURVEY

Good day, we are doing a brief census-type survey to help us identify our shopper needs. Could you spare me 3 minutes of your time to answer a few questions ?

Thank you.

PART 1

1(a) What is the name of the road you live in ?

.....

1(b) What residential area is that ?

.....

2. How often do you visit this centre ?

At lease once a week

Several times per month

Once every few months

First visit

3(a) Which shops have you visited so far today ?

3(b) Which other shops do you intend visiting ?

Q 3(a) Q 3(b)
Shops Intend
Visited Visiting

N.B.S.	6-1	6-2
U.B.S.	7-1	7-2
Allied Building Society	8-1	8-2
Barclays Bank	9-1	9-2
Standard Bank	10-1	10-2
Foschini	11-1	11-2
Scotts Shoes	12-1	12-2
Miladys	13-1	13-2
Walk Tall Shoes	14-1	14-2
Checkers	15-1	15-2
Burger Ranch	16-1	16-2
Continental Coffee Bar	17-1	17-2
Salad Bowl	18-1	18-2
Chester Butchery	19-1	19-2
Ovengold Bakery	20-1	20-2
Rebel Bottle Store	21-1	21-2
C.N.A.	22-1	22-2
Salon Zenobia	23-1	23-2
Peoples Chemist	24-1	24-2
Leith Properties	25-1	25-2
Laundromat	26-1	26-2
Davenport Hardware	27-1	27-2
Derry's Drapery	28-1	28-2
Raoul Sports Shop	29-1	29-2
Scamps Pooch Parlour	30-1	30-2
Video Home	31-1	31-2
Finishing Touches	32-1	32-2
Joy's Florist	33-1	33-2
Budget Photo	34-1	34-2
Trifles & Treasurers	35-1	35-2

4. Why do you visit this centre ?

36/37

- convenience
- pleasant shopping conditions
- variety of shops
- for a particular shop/service : Checkers
- other (specify)
- other (specify)
-

1
2
3
4
5
6

5. Where do you do most of your regular food shopping ?

38/39

- this centre
- another centre : Berea Centre
- Glenwood Centre (Village)
- Musgrave Centre
- Sanlam Centre
- Overport City
- Windermere Centre
- CBD (town)
- particular store (specify location)
-
- other
-

1
2
3
4
5
6
7
8
9
10

6. Where do you do most of your regular shopping for clothing ?

40/41

- this centre 1
- another centre : Berea Centre 2
- Glenwood Centre (Village) 3
- Musgrave Centre 4
- Sanlam Centre 5
- Overport Centre 6
- Windermere Centre 7
- CBD (town) 8
- particular store (specify location) 9
-
- other 10
-

7. Where do you do most of your regular shopping for hardware and furniture ?

42/43

- this centre 1
- another centre : Berea Centre 2
- Glenwood Centre (Village) 3
- Musgrave Centre 4
- Sanlam Centre 5
- Overport City 6
- Windermere Centre 7
- CBD (town) 8
- particular store (specify location) 9
-
- other 10
-

8. Is there any kind of shop or service that you feel is lacking in this centre ? (probe).

.....
.....
.....

44	45

PART 2

Finally I would like to ask a few general questions concerning yourself which will help us to compare our answers.

1.	Sex		46
		Male	1
		Female	2

2.	Into which of the listed age categories do you fit (just give the number).		47
		17 - 20 Years	1
		20 - 35 Years	2
		36 - 45 Years	3
		46 - 60 Years	4
		60 + Years	5

3.	What is your occupation ? Are you employed full time, part time, are you a homemaker, student, or are you not working at present.		48
		Employed full time	1
		Employed part-time	2
		Housewife/homemaker	3
		Student/scholar	4
		Pensioner	5
		Not working	6

4. What is your home language ?

49

English	1
Afrikaans	2
Zulu	3
Other (specify)	4

5. What was the last qualification you got ?

50

Up to Std. 9	1
Matric	2
Diploma	3
Degree	4

6. Are you shopping for yourself only or for a family ?

51

Self	1
Family	2
Other	3

7. What is your average household income per month.
(Just give the number).

52

Up to R200	1
R200 - R499	2
R500 - R799	3
R800 - R999	4
R1 000 - R1 499	5
R1 500 - R1 999	6
R2 000 +	7

8. Race Group.

White	1
Indian	2
Coloured	3
Black	4

Thank you very much for your co-operation.

DOOR-TO-DOOR SURVEY

Good day, I am doing a brief survey of people's attitudes to Davenport Shopping Centre. Could you spare me 10 minutes of your time to answer a few questions ?
Thank you.

PART 1

TIME :

(1) Have you ever visited Mutual Square/Davenport Shopping Centre ?

	5
YES	1
NO	2

If answer is NO proceed to Q4.

(2) How often do you visit the Centre ?

	6
- At least once a week	1
- Several times per month	2
- Once every few months	3

(3) Why do you visit the Centre ?

	7
- Convenience	1
- Pleasant shopping conditions	2
- Variety of shops	3
- For a particular shop or service - Checkers	4
- Other (Specify)	5

- Other (Specify)	6

(4) Do you have any particular reasons for not shopping at Mutual/Davenport Centre ?

8	9	10	11

(5) Is there any other Shopping Centre/s or Hypers that you visit regularly ?

	NO	YES	HOW OFTEN ?			WHY ? CONVENIENCE	PLEASANT SHOPPING CONDITIONS	VARIETY OF SHOPS	FOR PARTICULAR SHOP OR SERVICE (SPECIFY)	OTHER (SPECIFY)
			ONCE WEEKLY	SEVERAL TIMES MONTHLY	EVERY FEW MONTHS					
	0									
BEREA CENTRE		12-1	13-1	13-2	13-3	14-1	14-2	14-3	14-4	14-5
GLENWOOD (VILLAGE)		15-1	16-1	16-2	16-3	17-1	17-2	17-3	17-4	17-5
MUSGRAVE CENTRE		18-1	19-1	19-2	19-3	20-1	20-2	20-3	20-4	20-5
OVERPORT CITY		21-1	22-1	22-2	22-3	23-1	23-2	23-3	23-4	23-5
SANLAM CENTRE		24-1	25-1	25-2	25-3	26-1	26-2	26-3	26-4	26-5
WINDERMERE CENTRE		27-1	28-1	28-2	28-3	29-1	29-2	29-3	29-4	29-5
MONTCLAIR CENTRE		30-1	31-1	31-2	31-3	32-1	32-2	32-3	32-4	32-5
LA LUCIA MALL		33-1	34-1	34-2	34-3	35-1	35-2	35-3	35-4	35-5
WESTVILLE MALL		36-1	37-1	37-2	37-3	38-1	38-2	38-3	38-4	38-5
KNOWLES HYPERSTORE		39-1	40-1	40-2	40-3	41-1	41-2	41-3	41-4	41-5
HYPERMARKET BY THE SEA		42-1	43-1	43-2	43-3	44-1	44-2	44-3	44-4	44-5
HYPERAMA PROSPECTON		45-1	46-1	46-2	46-3	47-1	47-2	47-3	47-4	47-5
OTHER (SPECIFY)		48-1	49-1	49-2	49-3	50-1	50-2	50-3	50-4	50-5

(6) Where do you do most of your regular food shopping ?

51/52	
- Mutual Square	1
- Another Centre - Berea Centre	2
Glenwood (Village)	3
Musgrave Centre	4
Overport City	5
Sanlam Centre	6
Windermere Centre	7
- CBD (Town)	8
- Particular store (Specific location)	9

- Other (Specify)	10

(7) Where do you do most of your regular shopping for clothing ?

53/54	
- Mutual Square	1
- Another Centre - Berea Centre	2
- Glenwood Centre	3
- Musgrave Centre	4
- Overport City	5
- Sanlam Centre	6
- Windermere Centre	7
- CBD (Town)	8
- Particular Store (Specify location)	9

- Other (Specify)	10

(8) Where do you do most of your regular shopping for hardware and furniture good ?

55/56	
- Mutual Square	1
- Another Centre - Berea Centre	2
- Glenwood Centre	3
- Musgrave Centre	4
- Overport City	5
- Sanlam Centre	6
- Windermere Centre	7
- CBD (Town)	8
- Particular store (specify location)	9

- Other (Specify)	10

NOTE: If respondents have answered NO to Q1 then do not ask Q9.

(9) NOTE: If respondents have answered NO to Q1 then do not ask Q9.

Are there any shops or services that you feel are lacking at Mutual Square (Davenport Centre)

57	58	59	60

PART III

Finally, please could you assist us by filling in the information below to help compare our answers.

This information is strictly confidential.

NAME : -----

ADDRESS : -----

PHONE : -----

70

72

MALE
FEMALE

1
2

73

AGE GROUP:- 17-20 yrs
 20-35 yrs
 36-45 yrs
 46-60 yrs
 60+ yrs

1
2
3
4
5

EMPLOYMENT STATUS

74

Employed Full-Time
 Employed Part-Time
 Housewife/Homemaker
 Student/Scholar
 Pensioner
 Not working

1
2
3
4
5
6

HOME LANGUAGE

75

English
 Afrikaans
 Zulu
 Other (Specify)

1
2
3
4

EDUCATION

76

Up to Std 9
 Matric
 Diploma
 Degree

1
2
3
4

HOUSEHOLD INCOME PER MONTH

77

Up to R200
 R200 - R499
 R500 - R999
 R1 000 - R1 499
 R1 500 - R1 999
 R2 000 +

1
2
3
4
5
6

HOUSEHOLD SIZE

No of people living in house -----

78	79
----	----

Thank you for your co-operation.

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