

# Ethnography as a Competitive Advantage in Retail: a study of how ethnographic research is used in food courts in shopping malls



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## **ABSTRACT**

The research study investigates how ethnography can be employed to improve customer retail experiences by an examination of food courts in shopping malls. In a competitive, sophisticated and connected retail environment, a holistic understanding of customer experiences is a critical factor for retail success. The modern customer expects a memorable, visual, sensory and pleasant shopping experience. Gone are the days when retail was based only on purchasing activities.

The study employed mixed-methods research which included a literature review of ethnographic research methods, observation of customer behaviours in a food court, interviews with shopping centre managers and food court patrons, and a case study of the Sandton City Shopping Centre food court. A food court is chosen since it captures the sight, sound, sensory, touch and taste behaviours of customers in an interactively confined space.

The findings reveal that retailers should consider many aspects to improve the customer retail experience such as the density of customers in the catchment area, location, safety and security, layout, product quality, design, product mix, pricing, atmosphere, aesthetics, market research and parking.

The study concludes that ethnography can be used very effectively as a tool to gain a competitive advantage in the retail market. It can be applied by all retail types.

An easy-to-use toolkit that consists of non-formal, cost and time-efficient ethnographic research methods is developed to better understand customers and their shopping experiences. It is recommended that retailers should employ ethnography in their settings. Furthermore, retailers should be offered training and development in ethnography.

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**TABLE OF CONTENTS**

ABSTRACT..... 1

PERMISSION TO DISSEMINATE AND COPYRIGHT AGREEMENT ..... 2

EXECUTIVE SUMMARY ..... 5

CHAPTER ONE: INTRODUCTION ..... 9

    1.1 BACKGROUND ..... 9

    1.2 PROBLEM STATEMENT..... 9

    1.3 MOTIVATION FOR STUDYING THE FOOD COURT ..... 13

    1.4 PURPOSE..... 14

    1.5 OBJECTIVES..... 15

    1.6 RESEARCH QUESTIONS ..... 15

    1.7 ASSUMPTIONS..... 16

    1.8 LIMITATIONS ..... 17

    1.9 RESEARCH METHODOLOGY..... 17

    1.10 CONCLUSION ..... 18

CHAPTER TWO: LITERATURE REVIEW ..... 20

    2.1 ETHNOGRAPHY..... 20

    2.2 ETHNOGRAPHIC RESEARCH..... 20

    2.3 RETAIL ETHNOGRAPHY..... 21

    2.4 RETAIL ETHNOGRAPHIC RESEARCH..... 22

    2.5 CHARACTERISTICS OF RETAIL ETHNOGRAPHY ..... 22

    2.6 PRINCIPLES OF ETHNOGRAPHIC RESEARCH ..... 22

    2.7 DATA COLLECTION METHODS..... 24

    2.8 STRENGTHS OF RETAIL ETHNOGRAPHY ..... 29

    2.9 LIMITATIONS OF RETAIL ETHNOGRAPHY ..... 30

    2.10 APPLICATION OF RETAIL ETHNOGRAPHY..... 30

    2.11 GUIDE FOR ETHNOGRAPHY..... 30

    2.12 CONCLUSION ..... 31

CHAPTER THREE: RESEARCH DESIGN AND METHODS..... 32

    3.1 RESEARCH DESIGN..... 32

    3.2 RESEARCH METHODS ..... 33

    3.3 SAMPLING ..... 34

    3.4 RELIABILITY AND VALIDITY ..... 35

    3.5 DATA ANALYSIS ..... 35

    3.6 CONCLUSION ..... 36

CHAPTER FOUR: ANALYSIS OF FINDINGS ..... 37

    4.1 INTERVIEW FINDINGS..... 38

4.2 FOOD COURTS IN SOUTH AFRICAN MALLS .....	64
4.3 CHALLENGES & OPPORTUNITIES FACING LOCAL FOOD COURTS .....	65
4.4 EXAMPLES OF GOOD PRACTICE.....	66
4.5 CASE STUDY OF SANDTON CITY FOOD COURT .....	68
4.6 SUMMARY OF FINDINGS .....	77
4.7 CONCLUSION .....	79
CHAPTER FIVE: RECOMMENDATIONS.....	80
5.1 INTRODUCTION .....	80
5.2 GENERAL RECOMMENDATIONS.....	80
5.3 TOOLKIT FOR PRACTISING RETAIL ETHOGRAPHY.....	81
5.4 DIRECTIONS FOR FUTURE RESEARCH .....	82
5.5 FINAL REMARKS.....	82
BIBLIOGRAPHY.....	84

## EXECUTIVE SUMMARY

**Chapter One - Introduction:** The research study investigates how ethnography can be employed to improve customer retail experiences. In a competitive, sophisticated and connected retail environment, a holistic understanding of customer experiences is a critical factor for retail success. Gone are the days when customers were satisfied with mere transaction-based shopping experiences. Shopping has shifted to the realm of emotional, novel, memorable, aesthetic, engaging and recreational customer experiences. This requires that retailers innovate and create enhanced channels for ensuring memorable shopping experiences.

In South Africa, ethnography is used mainly by shopping malls and retail chain stores to improve the shopping experience. There is no evidence to suggest that ethnography is used by other retail types. As a vehicle to improve sales, customer loyalty and communication, ethnography is a very powerful tool for achieving these objectives.

The key research question is: *can ethnography offer a competitive advantage in the retail market?*

**Chapter Two - Literature Review:** Ethnography is a branch of anthropology. The latter studies the behaviour of people and their responses to elements in their environments in different cultural settings. It is qualitative research and gives insight into the reasons for the choices made by people in their social contexts. It also identifies cultural and social influences that shape behaviour.

Retail ethnography is the study of the behaviour and responses of consumers in a retail environment. It studies the way people react to products and services, their interaction with objects in the retail setting, their speech and emotions, and their experiences during the use of a product or service. It explores the factors which influence these behaviours, practices and reactions, and aims to discover consumer perceptions through the perspective of the consumer.

Some of the common ethnographic research methods are observation, interviewing, casual conversations, document analysis, site documents, case study, mystery shopping, shop along and shadowing.

The key features of ethnography that are adapted for retail ethnographic research are:

- Research is conducted in a natural setting (i.e. retail environment) such as malls, shopping centres, stores and not in a laboratory setting.
- Intimate interaction with consumers is required and is often conducted face-to-face.
- Consumer behaviour is analysed.

- Multiple data collection methods are used, which include interviews, observation, and reviewing of visual materials.
- The nature of social phenomena is explored instead of aiming to test hypotheses.
- A few cases are investigated and sometimes only one in detail.
- The data analysis procedures involve the interpretation of meanings of consumer actions. These interpretations are confined to the retail setting.
- Ethnographers are required to be insightful about the retail sites where their studies are conducted.
- It is an investigation of things consumers do, the choices they make, and their reasons to ascertain the significance of consumer behaviours.

**Chapter Three - Research Design and Methods:** The study employed mixed-methods research which includes a literature review, observation, interviews and a case study.

A literature review of ethnographic research methods is conducted. These range from sophisticated, high-tech methods to more simple, cost-effective methods. The purpose is to present various research methods that can be chosen by retailers based on their budgets, skills and time frames.

Interviews are conducted with six shopping centre managers and fifteen food court patrons. The interviews are conducted using a semi-structured interview schedule. The schedule encompasses broad probing questions covering key themes in the study. All questions are open-ended.

Purposive sampling is used to select centre managers for interviews. In purposive sampling, interviewees are selected on pre-determined criteria relevant to the research issues under consideration. Centre managers were chosen based on their expert knowledge and experience of retailing and customer experiences. Purposive sample sizes are often based on theoretical saturation – the point in data collection, when new data no longer brings additional insights to the research questions.

Direct observation is used to observe customer behaviours in the Sandton City Shopping Centre food court. A food court is chosen since it captures the sight, sound, sensory, touch and taste behaviours of customers in an interactively confined space. Researchers were deployed to the food court to observe behaviours. Two days were spent at the food court. Fifteen patrons were consulted. From this, a case study is produced of the Sandton City Shopping Centre.

This study has validity and reliability in that there is integrity in the application of the research methods employed, and the precision in which the findings accurately reflect the data, as well as the consistency in the use of the analytical procedures.

Data collected through various research methods were triangulated. Through constant comparative analysis, the researcher builds categories and breaks them down into smaller units of meaning. In this way, the richness and complexity of the data is recognised. The objective of data analysis is to link and integrate categories in such a way that variation is captured inductively.

**Chapter Four – Analysis of Findings:** The following observations come to light about the food court:

- It has been revamped with a new layout, new furniture and walkways. There is a focal point that serves as an anchor for the food court.
- Access to the food court from certain parking areas is very easy. If patrons want to go directly to the food court, these parking areas are ideal. Within the centre, the signage for the food court is conspicuous.
- The food court consists of two parts. The first is an open area where patrons are visible to each other. There is a huge TV screen featuring sports events. This is suitable for patrons wanting to watch matches. It creates a good atmosphere and vibe.
- The second part is more private with dividers that accommodate about six tables per area. It is more private but not concealed. The furniture and layout ensure small spaces for intimate conversations.
- Although the food court is very busy during weekends, there is no shortage of seating space. Before the revamp, the food court had limited seating space which turned customers away.
- The food court has major brands such as Adegas Express, Fishaways, Anat, Ocean Basket, Popeyes, Debonairs Pizza, Krispy Kreme and Cinnabon.
- Although the stores have their signs, the lighting in the food court is not overwhelming.
- There are few restaurants in the food court area. This does not overwhelm shoppers with choices.
- The food prices are reasonable for middle-and high-income patrons with more pricey restaurants in other areas of the mall.
- Patrons are generally positive about their shopping experiences in the food court.

There is a consensus that the food courts in shopping centres are an important element in the overall customer retail experience. There are several food court trends. Conveniences such as charging stations, lockers, large interactive screens for sports and kids play areas are becoming a necessity. There is also a move towards healthy eating options and green spaces.



Some of the characteristics that interviewees identified for great food courts are the following: ample, comfortable and spacious seating arrangements; diversity in the tenant mix to give greater food choices; clean restrooms are non-negotiable; central location with easy accessibility; safety and security; and catering for groups that frequently visit the centre is important to win loyalty.

Shopping centres utilise a variety of methods to evaluate the performance of tenants and the success of the food courts which includes turnover of tenants; trading density (square metre x turnover); monitoring through social media; and mystery shopper feedback.

The findings reveal that retailers should consider many aspects to improve the customer retail experience such as the density of customers in the catchment area, location, safety and security, layout, product quality, design, product mix, pricing, atmosphere, aesthetics, market research and parking.

**Chapter Five – Recommendations:** The study concludes that ethnography is a very effective tool to gain a competitive advantage in the retail market.

An easy-to-use ethnography toolkit consisting of non-formal, cost and time-efficient ethnographic research methods is developed to better understand customers and their shopping experiences. Support to apply ethnography in retail should include training and development.

The following recommendations are offered:

- Develop a training programme on retail ethnography.
- The training programme should consist of the following package: training guides, resources and a facilitator guide.
- The training programme should be offered to retailers' country wide.
- After six months, a post-training impact assessment of the benefits of the training programme should be conducted.

## CHAPTER ONE: INTRODUCTION

### 1.1 BACKGROUND

The Wholesale and Retail Sector Education and Training Authority (W&RSETA) is a statutory body that has been re-established by the Minister of Higher Education and Training in terms of the *Skills Development Act of 1998* to enable its stakeholders to advance the national and global position of the wholesale and retail sector.

The Durban University of Technology (DUT) has been awarded the Retail Chair by the W&RSETA. The DUT has commissioned FR Research Services to conduct a study of how ethnography can be used by retailers to obtain a competitive advantage in the retail market.

FR Research Services investigated ethnographic research methods that can be employed to improve retail performance and demonstrate how this form of research can be applied to improve customer<sup>1</sup> retail experiences in food courts in shopping malls<sup>2</sup>. In addition, a retail ethnography toolkit is developed for retailers wanting to conduct ethnographic research to gain a competitive advantage in the retail market.

### 1.2 PROBLEM STATEMENT

Changing Customer Experiences: The retail customer experience is a critical success factor in a sophisticated, connected and fiercely competitive retail market. Gone are the days when customers were satisfied only with transaction-based shopping experiences.

A substantive body of research suggests that shopping has turned into an experiential activity (Holbrook and Hirschman 1982, p 132). Retailers seek manifest ways to generate entertaining shopping experiences as a source of competitive advantage (Jones 1999, p 129). Shopping has shifted to the realm of emotional, novel, memorable, aesthetic, engaging and recreational customer experiences, and this necessitates that retailers innovate and create enhanced channels for ensuring such experiences.

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<sup>1</sup> Shopper and customer is used interchangeably.

<sup>2</sup> Shopping mall and shopping centres is used interchangeably.

Molenaar (2010, p 46) describes new customers as follows:

*"Customers are individualistic, self-willed and have their preferences and motives... More than ever before, selling is about listening to and communicating with the customers. This means not performing a "hard sell" and continually pushing the advantages of the product, but rather responding to buying motives and working on building a continuing relationship."*

Several researchers have described why excellent customer experiences are important for retail. It influences customer satisfaction (Liljander and Strandvik, 1997); increases customer loyalty (Yu and Dean, 2001; Pullman and Gross, 2004, Mascarenhas et al., 2006); affects expectations (Johnson and Mathews, 1997; Flanagan et al., 2005); supports the brand (Grace and O’Cass, 2004; Berry and Carbone, 2007), builds confidence (Flanagan et al., 2005); and also creates emotional bonds with customers (Pullman and Gross, 2004). According to Anastassova and Luizov (2018, p. 176), there is tangible value added in services when there is effective management of the customer experience.

Schmitt (1999, p 24) states that experiential marketing “is a process that encourages customers to sense, feel, think, act and relate to a subject” and therefore marketers are moving away from traditional “features and benefits marketing” towards creating novel customer experiences. Schmitt’s experience model reveals that five of the most important attributes shaping the shopping experience belong to three components: sensory (“freshness of goods - meat, fruits, vegetables, hygiene and aromatization”); cognitive (“good price-value ratio” and “product variety”); and emotional (“kind and correct service”).

Therefore, shopping experiences can be enhanced by experience-centric applications. Consequently, customer buying behaviour has set new challenges for retailers.

**Local Shopping Malls:** Competition in South Africa’s retail market is intense, with more than 25 million m<sup>2</sup> of formal retail space in shopping malls. Currently, there is an excess of 2 000 shopping malls and close to 3 million m<sup>2</sup> of formal retail space in the pipeline (Staff Reporter 2019, p 2).

With tough trading conditions, shopping malls have been adversely affected by high vacancies, lower rentals, rising utility costs, and lack-lustre consumer spending.

Consequently, mall owners are halting expansion plans and closing underperforming stores. Between 2010 and 2016 no fewer than 195 shopping malls were built in South Africa with another 68 expected to open their doors by 2020. The country has the

world's 3<sup>rd</sup> highest retail supply in terms of supply per (m<sup>2</sup>) unit of GDP, after the United States and Canada (Muller 2019, p 40).

The Financial Mail feature on mall owners (Muller 2019, p. 40) states:

*"...to remain competitive in the current environment, mall owners have to focus on increasing on-value add asset management initiatives. It boils down to how well you know and understand your customers and adapt your product offering to suit their needs."*

The article also mentions:

*"shopping centres must spend more time and money on tweaking product offerings and tenant mix or lose customers. Now you have to be much closer to your tenants and customers to ensure you give them exactly what they want, or they will simply go elsewhere."*

In the face of competition, shopping malls need to be alert to, and agile in, responding to new shopper trends, behaviours and technology in a fast-paced, ever-evolving retail sector.

Redefine Properties is the country's largest retail property management company. Three of its Gauteng malls are undergoing capital expenditure programmes, the biggest of which is the R1.06 billion refurbishment of the Centurion Mall. Redefine intends to increase footfall to the mall by expanding its food court offerings, leisure and entertainment. The underlying thinking is that people are a social being. They want to spend downtime in a place where they can integrate shopping with other aspects of their lifestyle (Muller 2019, p. 41).

However, many shopping mall owners have yet to understand the benefits of offering holistic customer experiences. There is still the belief that building a profitable mall is a simple exercise that requires location, size, layout, parking and access routes.

Consumers behaviours are changing so dramatically that mall owners and retailers are facing what is referred to as a "retail apocalypse". In the US and UK, hundreds of retail chains have filed for bankruptcy, thus crippling formerly thriving shopping malls. In South Africa, the industry players are grappling with convincing cash and time-strapped consumers to visit malls, stay longer and spend more (Muller 2019, p. 41).

According to Terblanche (in Muller 2019, p. 41), the changing shopping behaviour in South Africa will be driven by technology and rising living costs:

*“Local shopping centres and retailers need to up their game if they want to avoid a similar wave of store closures, consolidations and downsizing to that in the US and UK. Being innovative and looking at emerging trends and implementing them will be more important than ever before. Simply offering a space to shop isn’t going to cut.”*

Hence, competition in the local retail market is rife. As such, new offerings are vital to attracting market share. The retail market is changing and evolving at a rapid pace, with innovation being one of the key success factors to survival.

**Paucity of Research:** There is a paucity of research studies on customer experiences in food courts in shopping malls in South Africa. Issues such as retail experience management, attributes of a memorable food court, and customer experiences about the importance of these attributes have not received adequate attention. There has yet to be a realisation that the customer experience may provide a new means of competitive retail advantage.

Internationally, insufficient research is also a problem. Petermans, Janssens and Van Cleempoel (2013, p 1) argue that despite the growing recognition of the significance of customer experiences in retail practice, academic literature on this topic often lacks conceptualisation of the phenomenon.

Pei and Yin (2014, p 35) found that very little studies have focused on customer retail needs in the United Kingdom. They state that previous studies adopt a quantitative approach through surveys and the results may not be a true account of the current scenario.

Healy, Beverland, Oppewal and Sands (2007, p 1) found that our understanding of the retail experience has been limited to studies on the effect of one or two variables (such as music and light) on perceptions. Few researchers have focused on holistic consumer experiences. As a result, our understanding is limited to reports on short-term personal visits to stores by consultants, or quantitative assessments of a particular design or experiential variable conducted in experimental situations, usually with student subjects.

Cachero-Martinez and Vazques-Casielles (2017, p 17) distinguished several experience dimensions when exploring the shopping experience. They developed a shopping experience scale that includes six dimensions: sensory (tactile, scent, auditory, visual, taste), intellectual (through design and with employees), social, pragmatic and emotional. Analysing retail experiences by activities, their study indicates that the emotional experience predominates. Pine and Gilmore (1999, p 22) associated

consumer participation in retail services with audience participation in theatre and focused on joyful customer participation in the retail experience.

Hence, there is a need for innovations relating better holistic experiences in the food courts. Market researchers should investigate customer experiences and its influence on shopping behaviours. The shopping mall owners should develop customer experience management strategies (Anastassova and Luizov 2018, p. 176).

**Retail Ethnography:** In South Africa, retail ethnography is used by large shopping malls and national retail chain stores to improve the shopping experience. They have the resources to solicit the services of market research firms.

There is no evidence to suggest that retail ethnography is used by other retail types. As a vehicle to improve sales, customer loyalty, and better communication, retail ethnography is a very powerful tool for securing competitive advantage. Hence, the need to employ retail ethnography widely among retailers.

Ethnography has the following benefits for retailers:

- It is easy to use with proper training.
- It is cost-effective and efficient.
- It provides on-time information and insights.
- It can be used in all retail types.

### **1.3 MOTIVATION FOR STUDYING THE FOOD COURT**

Shopping malls serve multi-facet purposes. Initially, shopping malls were a place to buy goods and services. Today, shopping malls are a place for meeting friends, dating, eating, playing sports, going to the gym, seeking entertainment from cinemas to rock-climbing, reading, attending launches, meeting celebrities, working, or simply relaxing the time away.

The customer expects memorable, novel, visual, sensory and pleasant experiences when visiting malls. From the moment they enter the parking area to the time they depart these expectations persist. Such demands are the difference between high and low footfall traffic in malls. Unless mall owners can meet customer expectations, they live with the risk of losing customers to rivals.

The food court in shopping malls is a key factor to attracting customers. Shopping and spending quality time in the food court goes together. It is potentially a competitive factor that is harnessed smartly by some, but not necessarily all malls. This area of retail provides a fertile ground for research.

### **The new wave of change on the horizon**

Some of SA's biggest retailers are bringing in fresh ways of keeping shoppers engaged as consumers globally abandon department stores for speciality stores and spend more of their money online.

TFG's Sportscene this month opened a concept store in Sandton City with a DJ recording studio, a tattoo parlour and a mini basketball court. Builders Warehouse opened a new flagship store in Boksburg in April offering practical help for customers in getting wood and metal cut, as well as the latest technology trends. There's a 3D printing service and customers can pay without waiting to queue for a till.

Local retailers are starting to tap into "retailtainment", but they lag behind global companies that are pushing the boundaries more aggressively to cope with tough times.

*Business Times, 23 September 2019, P. 3, Adele Shevel*

## **1.4 PURPOSE**

The purpose of this research study is to determine how ethnography can be used to gain a competitive advantage in the retail market.

## **1.5 OBJECTIVES**

The objectives of this research study are to:

- Identify ethnographic research methods that can be employed to gain a competitive advantage in the retail market.
- Conduct a study of customer food court experiences in shopping malls employing the appropriate retail ethnography.
- Analyse global and local trends shaping the customer food court experiences in shopping malls.
- Devise a retail ethnography toolkit for conducting, analysing, interpreting and improving customer food court experiences.

## **1.6 RESEARCH QUESTIONS**

The key research question is:

**Can ethnography offer retailers a competitive advantage in the retail market?**

To respond to the above question, the following secondary research questions are addressed.

- What ethnographic methods can be employed to gain a competitive advantage in the retail market?
- What are the different customer food court experiences observed in food courts in shopping malls?
- What are the global and local trends shaping the customer food court experiences in shopping malls?
- What are appropriate approaches and methods for conducting, analysing, interpreting and improving retail experiences?



The research questions explore and demonstrate the use of ethnography to transform customer information into intelligence for improving retail experiences and offering retailers a competitive advantage in the market.

## **1.7 ASSUMPTIONS**

The following assumptions underpin the research investigation:

- Ethnography can be employed by all retail types.
- Ethnography allows deep insight into the contradictory nature of much of human behaviour. The focus is on what people do versus what they say they do. In other words, it is about identifying hidden needs – and this is where the real breakthroughs can occur.
- Ethnography observes behaviours in a specific social situation using qualitative research methods.
- Ethnography is based on an inductive research tradition. It often involves working with primarily unconstructed data. This data had not been coded at the point of data collection in terms of a closed set of analytic categories. It is conducted to accumulate descriptive detail to build explanatory theories rather than test hypotheses derived from existing theories.
- The ethnographer produces the participant's views through closely edited quotations and has the final word on how the events are to be interpreted and presented.
- Ethnography involves investigation of very few cases or just one case in detail. It makes use of small samples of informants: opportunistic samples – whoever seems likely to give 'rich' data, judgmental samples – seeking out people who may have specialist knowledge in an area.
- Ethnography does not generalise findings. Rather it considers findings of the context of the situation. It explores social phenomena rather than test hypotheses.
- Data analysis involves interpretation of the meanings of human actions. The product of this is mainly verbal explanations.

## **1.8 LIMITATIONS**

The following limitations of the investigation are acknowledged:

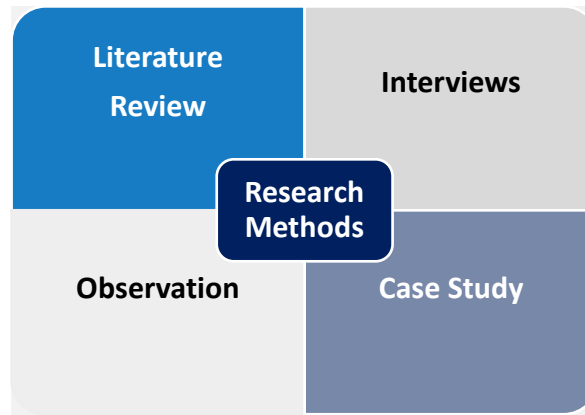
- Customer experiences are fundamentally a qualitative phenomenon. The customer experience is perceived exclusively from the viewpoint of an individual customer and is inherently personal, existing only in the customer's mind. Thus, no two people can have the same experience. Therefore, it is difficult to analyse and evaluate given the complex nature of human behaviours with a myriad of cultures, languages, beliefs, values, predispositions, preferences and geography.
- There is a paucity of academic research on customer experiences in shopping malls, especially in the South African context. Consequently, there is a lack of conceptualisation of key terms and theoretical frameworks to guide the research study.
- Retail ethnography as a research method requires engaging in extensive field work where data collection is mainly by interviews and observations. This is a costly and time-consuming exercise.
- Ethnographers bring their own experience to bear in pursuing questions to ask and reviewing data, which can lead to biases in directions of inquiry and analysis.
- Ethnography relies heavily on storytelling and the presentation of critical incidents, which is inevitably selective and viewed as a weakness by those used to the scientific approaches of hypothesis testing, quantification and replication.

## **1.9 RESEARCH METHODOLOGY**

A detailed explication of the research design, sampling, methods and analysis is provided in Chapter Three of this study. In this section, a brief description of how the research process unfolded is given.

The study is wholly embedded in ethnography, using a sub-set referred to as retail ethnography. Retail ethnography is the study of customer (shopper) behaviour. It is primarily qualitative research. It enables retailers to understand the customer experience better by observing events as it occurs in a natural setting.

In this investigation, four research methods are employed to gather information.



Firstly, a literature review of retail trends in shopping malls is conducted as a preliminary method of enquiry.

Secondly, shopping centre managers and food court patrons are interviewed using a semi-structured interview schedule. Since it is a qualitative study, six shopping mall managers and fifteen food court patrons are interviewed.

Thirdly, the behaviour of customers in the Sandton Centre Shopping Centre is observed.

Fourthly, a case study of the Sandton City Shopping Centre is developed.

### **1.10 CONCLUSION**

This study investigates how ethnography can be employed to improve the retail experience of shoppers. The methods can be applied by all retail types.

There is a substantial body of knowledge to indicate that the use of retail ethnography can increase customer loyalty, grow market share, and the profitability of enterprises. Retail ethnography is very widely used by large retailers and shopping malls. However, it is not employed by other retail types, although it can be a powerful tool for improving retail outcomes.

In a tough trading environment with the hyper-competition, retailers and shopping mall owners are doing everything possible to "keep their heads above water". Hence, there is a need for innovations relating to customer experience which will contribute to the better overall experience in food courts. Retail marketers should investigate customer experiences in the retail environment and their influence on shopping behaviour. To

exceed customer's expectations, shopping mall owners should develop and implement customer experience management strategies.

A mixed method is an approach to investigate the primary research problem of how retail ethnography can be employed. Data is collected using literature reviews; interviews with shopping centre managers and food court patrons; observations of shopper behaviours; and a case study of the Sandton City Shopping Centre food court.

## CHAPTER TWO: LITERATURE REVIEW

### 2.1 ETHNOGRAPHY

Ethnography is a branch of anthropology. The latter studies the behaviour of people in different cultural settings. It is qualitative research and gives insight into the reasons for the choices made by people in their social contexts. It also identifies cultural and social limitations and influences that shape their behaviour (Creswell 2012, p 22).

Ethnography is the oldest methodology of investigation of social phenomena (Elliott & Jankel-Elliott 2003, p 132). According to Chen *et al.* (2015, p 323), ethnography literally means “writing (graphy) about people (ethnos)”. The earliest records of ethnography date back to 1922, but since then, ethnography has transformed significantly.

Ethnographies can be performed in real-life settings. Some types of ethnographies, according to Creswell 2012, p 23), include *realist ethnography* (scientific and objective); *confessional ethnography* (which reports on fieldwork encounters of the ethnographer); *life history* (comprising a study of an individual’s life in their cultural setting); *autoethnography* (entailing a self-assessment by the ethnographer on their own life); *micro-ethnography* (comprising the study of a particular aspect of a cultural setting and group); *case study* (case analysis of an individual or phenomenon in a cultural setting); *critical ethnography* (investigates common patterns existing in a marginalised group with the objective being to offer support); *feminist ethnography* (study consisting of cultural practices that disempower and oppress women); *postmodern ethnography* (one that is constructed to face societal problems that have developed as a result of a modern emphasis on progress and marginalising individuals); and *ethnographic novels* (entailing fictional literature based on cultural aspects of groups).

### 2.2 ETHNOGRAPHIC RESEARCH

Ethnographic research involves spending time in the presence and in the environment of a community of people to study their beliefs, norms, behaviours and practices. Ethnographic researchers collect data on their subjects in several different forms, including surveys, interviews and observations, and seek to find patterns in the ways people think and act in a particular situation. The data is later analysed and interpreted to draw conclusions on the beliefs, norms, behaviours and practices. Thus, ethnographic research serves as a useful tool in understanding a community in their natural environment.

This type of research can range from weeks to years. According to Genzuk (2003, p 43), ethnographic research can be described as social science research comprising intimate engagement with the subjects of the study to gain experiences or insights into the experiences of the subjects under study. It may involve participation with, and not merely observation of, the subjects.

Dewan (2018, 16) states that an ethnographic researcher's aim is not to generalise their findings, but instead to gain perspective with reference to the context of the situation. Ethnography can thus be used as a tool to discover and understand relationships and to explain phenomena. Phenomena are explained and understood instead of tested, and the significance of the beliefs, norms, behaviour and practices of the subjects being studied are uncovered.

### **2.3 RETAIL ETHNOGRAPHY**

Retail ethnography is the study of the behaviour and responses of consumers in a retail environment. It studies the way people react to products and services, their interaction with objects in the retail setting, their speech and emotions, and their experiences during the use of a product or service. It explores the factors which influence these behaviours, practices and reactions, and aims to discover consumer perceptions through the perspective of the consumer.

According to Healy *et al.* (2007, p 756), retail ethnography can be successfully utilised to enhance the emotional connections of consumers with brands. This type of study is particularly useful to retailers to investigate purchasing trends, consumer perceptions and behaviour, and to determine current and future demands of consumers. Consequently, retailers can take the necessary measures to address challenges, fill niches in the market, or merely gain a competitive edge using relevant findings of the studies.

It is advised that although retail ethnography has the ability to produce reliable results, it should not be used as an exclusive research method. Other market research should be integrated with a retail ethnographic study for greater reliability and improved representation.

Retail ethnography, in layman's terms, is "the investigation of shopping habits" and can also determine the effect of regional and cultural differences on a retailer's success (*The Retail A to Z* 2016). It aims to understand the reasons or influential factors behind choices made by consumers, and their experiences with specific products and services.

## 2.4 RETAIL ETHNOGRAPHIC RESEARCH

According to Chen *et al.* (2015, p 323), although ethnography dates back to the early 1900s, it was only during the late 20<sup>th</sup> century that ethnography became a useful tool in the field of consumer and marketing research. Retail ethnographic research can be used to provide information on consumer experiences, preferences, emotions, influences and practices. It can be utilised to decipher consumer needs and greatly influence decision-making for businesses during development of products and services, and the development of marketing strategies. Consequently, such research plays a vital role in improving the overall customer experience and conducting business successfully.

## 2.5 CHARACTERISTICS OF RETAIL ETHNOGRAPHY

The key characteristics of ethnography have been extensively discussed by Gay *et al.* (2012, p 45) and adapted for retail ethnography as follows:

- It is conducted in a retail environment such as malls, shopping centres, stores.
- Intimate interaction with consumers is required and is often face-to-face.
- An accurate account of consumers' views and behaviours are obtained.
- It is interactive, inductive and repetitive.
- It uses unstructured data collection methods and analytical strategies.
- Fieldwork is used as a primary means of data collection.
- Multiple data collection methods are used.
- Human behaviour is framed in a socio-political and historical context.
- Culture is the lens for interpreting findings.
- Social phenomena are described instead of hypotheses testing.
- A few cases are investigated in detail.
- The data analysis involves interpretation of the meanings.
- Interpretations are confined to the context of the retail setting.
- It is an investigation of things that consumers do, the choices they make, and their reasons for consumer behaviours.

## 2.6 PRINCIPLES OF ETHNOGRAPHIC RESEARCH

**Naturalism:** This principle states the aim of ethnographic research is to capture human behaviours natural or real settings. It is achieved by obtaining first-hand contact with such behaviour and not by behaviours in experimental settings (Genzuck 2003, p 63). Chen *et al.* (2015, p 324) claim that ethnographers undertake their research in those

settings where the behaviour of interest occurs and where the subjects of interest spend their time daily.

Genzuk (2003, p 64) argues that a vital factor in naturalism is for the ethnographer to reduce their influence on the subjects being researched and to improve the chances of the findings in that setting being used as a basis to generalise behaviour in other settings. The researcher should not disturb the subjects and their behavioural patterns as this would defeat the purpose of naturalism, i.e. the behaviour will no longer be truly “natural”. He also explains that naturalism implies that social phenomena must be described in relation to the context.

**Contextualism:** Due to social events arising in different contexts, researchers may be more concerned with obtaining an in-depth understanding of those contexts than with seeking de-contextualise events (Chen *et al.* 2015, p 324).

**Humanism:** According to Chen *et al.* (2015, p 324), the basis of this principle is that phenomena that interest researchers involve people, their emotions, feelings, relationships, spaces and objects.

**Understanding:** Central to this principle is that human actions differ greatly from animals and objects, as they do not consist of fixed responses. Human actions consist of interpretation of stimuli in a specific context and construction of responses (Genzuk 2003, p 45; Chen *et al.* 2015, p 326). People react to stimuli in their environments by the way they perceive such stimuli and behave accordingly.

According to Chen *et al.* (2015, p 326), groups of people whether large and formal (e.g. ethnic groups), medium-sized and semi-formal (e.g. occupational), or small and informal (e.g. individual families), develop distinguished ways of relating to the world, and that these ways influence their interpretations of what occurs around them.

Genzuk (2003, p 52) states that to be able to effectively explain human actions and behaviour, the cultural grounds on which they are based must be understood since we are attempting to describe a society and its phenomena.

The author explains that ethnographers argue that understanding is also important in a context with which we are more familiar. The researcher may tend to make assumptions regarding the perspectives of a known society. They argue that this should be avoided because individuals and groups develop differing perceptions of reality. He further states that ethnographers gain insight into the culture of the group before presenting explanations for their observed behaviours. Genzuk (2003, p 53) mentions that participant observation and unstructured interviews are central to ethnography.

**Induction:** Induction refers to *discovery* – the research process is discovery-based (Genzuk 2003, p 56).



Chen *et al.* (2015, p 325) states that if the researcher approaches complex phenomena with preconceived ideas, they run the risk of failing to discover important relationships. They further explain that this does not mean that prior knowledge should be disregarded. However, it should be applied discerningly.

Ethnographers approach research with a general interest in some phenomena. As the research proceeds, they perform in-depth studies (Chen *et al.* 2015; Eriksson & Kovalainen 2015). As a result, Genzuk (2003, p 67) and Eriksson & Kovalainen (2015, p 150) state that over the course of the research, theoretical notions which outline descriptions and explanations are developed.

## **2.7 DATA COLLECTION METHODS**

Multiple research methods are used in ethnography. Some methods are more time-consuming than others, often rendering them more expensive. New research techniques are constantly developing and evolving.

Kottak (2010, p 83) mentions that ethnographers move between settings, places and subjects in a society to gain a holistic understanding of their social life. Ethnography allows for the generalisation of human behaviour.

The methods of ethnography are pieced together to form a picture of “otherwise alien lifestyles”. Several techniques are employed such as observations, conversations – both formal and informal, the genealogical method, interviews, longitudinal research and team research. Other methods include interview schedules, site documents, field notes, informant diaries, quasi-ethnography, audience ethnography, case studies and shadowing (Kottak 2010, p 89).

**Participant observation:** Participant observation methods can comprise short (hours) to long (years) observation periods (Eriksson and Kovalainen 2015, p. 112).

Copland *et al.* (2015) suggest that field notes are especially useful in ethnography as it allows for documentation associated with participant observation. One example of participant observation is working for the organisation as an understudy. It assists the researcher with developing an insider’s perspective of how it feels to be a part of the organisation. This fulfils the requirement of the participant aspect of observation (Bruni 2015, p 38).

Jorgensen (1989, p 49) explains that as an outsider that is present in the setting, the observer gains insight into otherwise inaccessible situations, without having familiarity with the general occurrences in that setting.

Kottak (2010, p 39) simplifies the concept of participant observation by describing it as engaging in community life while it is being studied. He adds that as human beings living in a community, researchers cannot be totally detached and totally unbiased observers.

**Non-participant Observation:** Hall & Hall (2008, p 21) describe this type of observation as one in which the researcher's role is as an outsider. Non-participant observation requires the ethnographer to collect data in the environment by observing the subjects of the study without any direct involvement with the subjects. The researcher is then required to analyse and interpret the information in search of patterns of social phenomena and establish explanations.

Kottak (2010, p 42) states that ethnographers must "record what they see as they see it". Stiner (2016, p 54) mentions that interactions of staff and clients allows for the actual needs of the client and for the business itself to emerge. The author also states that observations assist a business in realising more readily those areas which require attention.

**Key informant interviews:** It is common for ethnographers to supplement information gathered during observations with information gathered during interviews with people who have knowledge of the group or setting being researched (Eriksson & Kovalainen 2015, p 64). According to UCLA Center for Health Policy Research (2004, p 15), the aim of key informant interviews is to gather data from a diverse range of people that have expert knowledge about a community being studied.

Elliott & Jankel-Elliott (2003) state that a main characteristic of ethnographic interviews is the use of non-directive questions. Mikkelsen (2005, p 37) states that the purpose of this type of interview is to gain special knowledge on a subject. These interviews can be formal or informal. They give insight into why people are doing the things they are doing (Elliott & Jankel-Elliott 2003, p 27).

McKernan (1996, p 78) suggests that key informants are selected based on the fact that they have the time and specialised knowledge to give meaningful comments and descriptions. He states that these individuals are informed about the issues and tasks being investigated as a result of their experience with such matters.

According to Eriksson & Kovalainen (2015, p 65), interviews can be used by an ethnographer to choose a field site or to establish the significance of participants going through certain changes. The authors argue that although participant observation informs the ethnographer on actions and behaviour of subjects in a study, interviews assist the ethnographer with establishing subjects' direct reflections on their own circumstances, behaviour, events and identities which gives an insider's perspective on these aspects.

Eriksson & Kovalainen (2015, p 65) state that it is important to maintain good rapport with interviewees. This is accomplished through listening attentively to the interviewees. They also suggest that taking a keen interest in what the participant expresses and choosing a setting in which the participant feels more relaxed, helps with making them feel more socially comfortable. Kumar (1989, p 26) states that initial contact with the interviewee is a crucial part of the process to establish rapport.

In addition, the interviewees should be informed that their interviews contribute to the ethnographer's research and that they are made fully aware of the implications of their interviews (Eriksson & Kovalainen 2015). This is reinforced by The ASA (1999) in its guidelines on good research practice, where it states that studies involving human subjects should be performed following "freely given informed consent" by these subjects. It states that the consequences and confidentiality of the study, as well as information such as possible harm that may result from the study should be communicated to participants and informants.

**Casual Conversations:** Elliott & Jankel-Elliott (2003, p 215) discuss how some of the most valuable information collected can be derived from informal interviews or casual conversations. The authors state that during an informal interview, the ethnographer does not draw up a written list of questions, but instead a series of questioning strategies should be considered for various circumstances and used appropriately. Fetterman mentions (2010, p. 91) that casual conversations as being the most common type of ethnography. He describes these interviews as being useful in gaining insight into the thoughts of the subjects and a means of comparison of subjects' perceptions.

In Agar's (1996, p 45) view, informal interviews allow the participant to criticise and correct the questions posed; comment on the sensitivity of questions; and answer freely. He also discussed that a supportive method is to ask leading questions. These questions are used to determine perceptions developed by the participants by leading them toward modification or contradiction of a statement. However, it can be argued that such methods may lead to biased information.

Fetterman (2010, p 43) states that these informal interviews assist with creating and maintaining a healthy rapport with subjects. Casual conversations occur when field notes and participant observation interconnect Silverman & Patterson (2014, p 12). The authors state that these types of interviews take place when a researcher finds an opportunity, amidst making field notes, to interact with subjects in the field setting.

**Interview schedules:** An interview schedule consists of a series of questions but is not a questionnaire. Kottak (2010, p 45) states that an interview schedule is used by the researcher to talk to people face-to-face, whereas a questionnaire, is indirect and impersonal. The respondent reads the questions and fills out answers on a form.

Interview schedules should comprise 3 main parts, namely, “the opening”, “the body” and “the closing”. The *opening* should be designed to welcome and relax the interviewee. It should present the interview objectives, subject areas to be covered and the interview length. The interview *body* should consist of the subject areas addressed and the questions pertaining to them. Lastly, the *closing* should maintain the tone set during the course of the interview and should be concise but not abrupt.

**Site documents:** They are documents from the field site. Adams (2012, p 23) states that ethnographers gather and analyse a host of materials (or documents) during their studies. She describes these “materials” as newsletters, web pages, handicrafts and exhibits. These may further include documents such as reports, memos, advertisements, brochures, meeting minutes, correspondence and other written documents.

Eriksson & Kovalainen (2015, p 24) explain that site documents can be used to gain a general understanding of issues affecting the field site. An ethnographer is able to decipher what kinds of demands are placed on the people in the field site.

Murchison (2010, p 52) states that if an ethnographer is knowledgeable on where to access archived documents (relating to the field site), a multitude of documents may present themselves and prove useful to the research. He adds that the archives or documents may be physical, virtual or a combination of both. These site documents may be informal, organised or uncatalogued and may not necessarily be located in the vicinity of the field site.

With business documents there are often privacy or copyright rules and that these should be adhered to strictly. Therefore, permission be sought before use.

**Field notes:** Elliott & Jankel-Elliott (2003, p 34) describe the field notes of researchers as “written records of social activity” following the event. Eriksson & Kovalainen (2015, p 28) state that important details from the visit to the field site are easily forgotten unless notes are made immediately. Therefore, the ethnographer should set aside sufficient time for this activity.

Blommaert (2007, p 89) advises the researcher should maintain an open mind when making observations during fieldwork. Hymes (1980, p 36) believes that bias is unavoidable and the researcher should find means of compensation for it.

Copland *et al.* (2015, p 43) states that being subjective and partial is inevitable in any process of interpretation, and that the ethnographer should find suitable ways of mitigating accounts.

Emerson *et al.* (2011, p 56) describe the four main parts of field notes - jottings, description, analysis, and reflection. They describe jottings as “brief words or phrases” recorded at the field site in a notebook. Description entails recording everything the ethnographer can remember about an event, e.g. a training session or one-on-one conversation. Analysis is concerned with what the ethnographer learnt about the research questions at the site regarding themes and patterns which may assist with answering the questions. Reflection can be described as the ethnographer’s thoughts, feelings and knowledge gained during observations at the field site.

**Informant Diaries:** Informant diaries are persons from whom an ethnographer learns and studies. Marshall (1996, p 45) describes a key informant as “an expert source of information”. It is stated that in comparison to terms such as “subjects” and “respondent”, the term “informants: suggests that the individuals are very informed. Thus, the informants play a more dynamic role in the guidance and shaping of the process.

Butcher & Eldridge (1990, p 78) describe informant diaries as diaries in which informants are requested to note events as they take place.

**Quasi-ethnography:** Owen (1998, p 63) describes quasi-ethnography as a “deviation from a “true ethnography”. Similarly, Reed (2004, p 72) states that the term “quasi-ethnography” suggests a deviation from general ethnographic methods and the ability to “immerse oneself in a social world”.

Murtagh (200, p 62) defines quasi-ethnography as the period over which the study is conducted and the number of visits to the field site.

**Audience Ethnography:** Audience ethnography is a method used to study several groups separated by their social and cultural orientation.

Pitout & du Plooy (2001, p 45) state that this research method is to “explain and predict consumer and audience behaviour”. They state that many consumers have at some point been involved in audience research, for example, being contacted via email, telephone call, or questionnaire to assess new products, describe their media usage patterns, or to voice their political opinions.

**Case Studies:** Case studies are collected to provide useful information on social phenomena. Spradley (1979, p 61) states that deductions are made from three sources: the statements of subjects, the behaviour of subjects, and the artefacts of subjects. Fairhurst & Good (1991, p 27) outline five steps during planning of a case study. Firstly, the focus of the study should be identified. Secondly, a field site in which to conduct the

study should be identified and selected. If informants are to be involved in the study, then they should also be identified. Thirdly, data should be gathered through interviews. Fourthly, data should be gathered through field observations. Fifthly, the information should be analysed and a case study developed.

**Shadowing:** The Interaction Design Foundation (2019, p 1) describes shadowing as a technique which is widely applied. The researcher accompanies or “shadows” the user to observe how the latter makes use of a product or service in a natural setting.

Recknagel (2019, p 13) states that shadowing offers a “rich, comprehensive dataset” on actions, interdependencies and rationale of subjects.

Yao (2013) elaborates on this concept by explaining that this method entails observation of real-life situations for a fixed period in a specific context to gain an understanding of how people behave in that context.

This method is well-suited to retail ethnography, where the ethnographer can shadow the consumer to gain insight into their behaviour in a retail setting.

**Longitudinal research:** Saldaña (2003, p 38) states that a study can be dubbed “longitudinal” when it progresses over quite a long period. He also states that it does not have a minimum length to be considered ‘longitudinal’. These types of studies may progress over several months or years.

**Team Research:** Team researched can be defined as research which is coordinated by several ethnographers (Kottak 2010, 13). It allows several ethnographers forming a research team to cover several vast regions simultaneously. This enables the team to study various and more aspects simultaneously, and also has the advantage of making lighter work. The team research method may also assist in speeding up the research process due to the sharing of responsibilities.

Guest & MacQueen (2008, p 67) mention that team-based research is becoming common due to globalisation.

## **2.8 STRENGTHS OF RETAIL ETHNOGRAPHY**

Weber & Cheng (2013, p 22) state the following strengths:

- Opportunities to improve overall customer experiences.
- Retailers are able to identify gaps in their business approaches.

- Markets can be tested for demand of products and services.
- Problem areas in retailing can be recognised.
- Opportunities for gaining a competitive edge.
- The reasons for consumer beliefs, norms, behaviours and practices can be uncovered and used to better-influence decision-making during the product development stage.
- Consumer needs can be met readily and efficiently.
- Various technology and media can be used to collect data.

## 2.9 LIMITATIONS OF RETAIL ETHNOGRAPHY

Genzuk (2003) and Healy *et al.* (2007) mention the following:

- The duration of the studies can be time-consuming and costly.
- The perspective of the researcher may influence results.
- Observation methods are dependent on the researcher's skills.
- Information can be overloaded.

## 2.10 APPLICATION OF RETAIL ETHNOGRAPHY

According to Elliott & Jankel-Elliott (2003) and Healy *et al.* (2007), some conditions which necessitate the application of retail ethnography are the need to:

- Gain insight into products, services or brands.
- Improve existing products by obtaining feedback from consumers.
- Create new products and services.
- Reinvent the brand or reassess the retailer's goals.
- Bridge gaps in the provision of products and services.
- Identify niches in the market to gain a competitive advantage.
- Establish consumer in-store and post-purchase experiences and activities.
- Map consumer behaviours and practices, such as retail navigation, product and service usage, and in-store communications.
- Determine the flow between *static* and *dynamic* elements - *static* elements being the aesthetic and tangible aspects of a retail experience, e.g. products themselves, ambience, lighting and music, etc.; while the *dynamic* elements refer to human interactions and communication, i.e. "the exchange of dynamic information".

## 2.11 GUIDE FOR ETHNOGRAPHY

It has been discussed by Gay *et al.* (2012, p 34) that the following steps are followed as a guide to conducting ethnographic studies:

- Firstly, the purpose for conducting the study should be outlined so that the aims and objectives can be achieved. A retailer should identify niches in the market for the provision of new or revised products and services; aim to uncover ways to gain a competitive edge; and identify a demand for future products and services.
- Secondly, the researcher should represent how relevant the proposed study is using a frame of reference which is relatable to the reader. With respect to retail ethnography, the motivations for conducting such studies are generally for the retailer(s) to identify the wants, needs, emotions and perceptions of consumers surrounding the retailers' products, services and brands, and to determine the influences society, culture and the economy have on consumer behaviour, perceptions, practices and decision-making.
- Thirdly, the researcher must identify the site at which the study will be based and the sample group to be observed.
- Fourthly, the researcher must then identify the subjects of the study and establish rapport with them.
- Fifthly, the next step would be to gather the actual data. The researcher must ascertain what type of data collection methods will be applied and contemplate questions that could be posed during direct interaction with consumers.
- Sixthly, the researcher should analyse and interpret the results obtained. The researcher should discuss study limitations and recommendations.

## **2.12 CONCLUSION**

A variety of ethnographic methods can be employed depending on the nature of research required, time and costs. Corporates have the means to use sophisticated methods such as cameras and machines to measure footfall. Small retail outlets can use more common methods such as interviews and observation which are very effective.

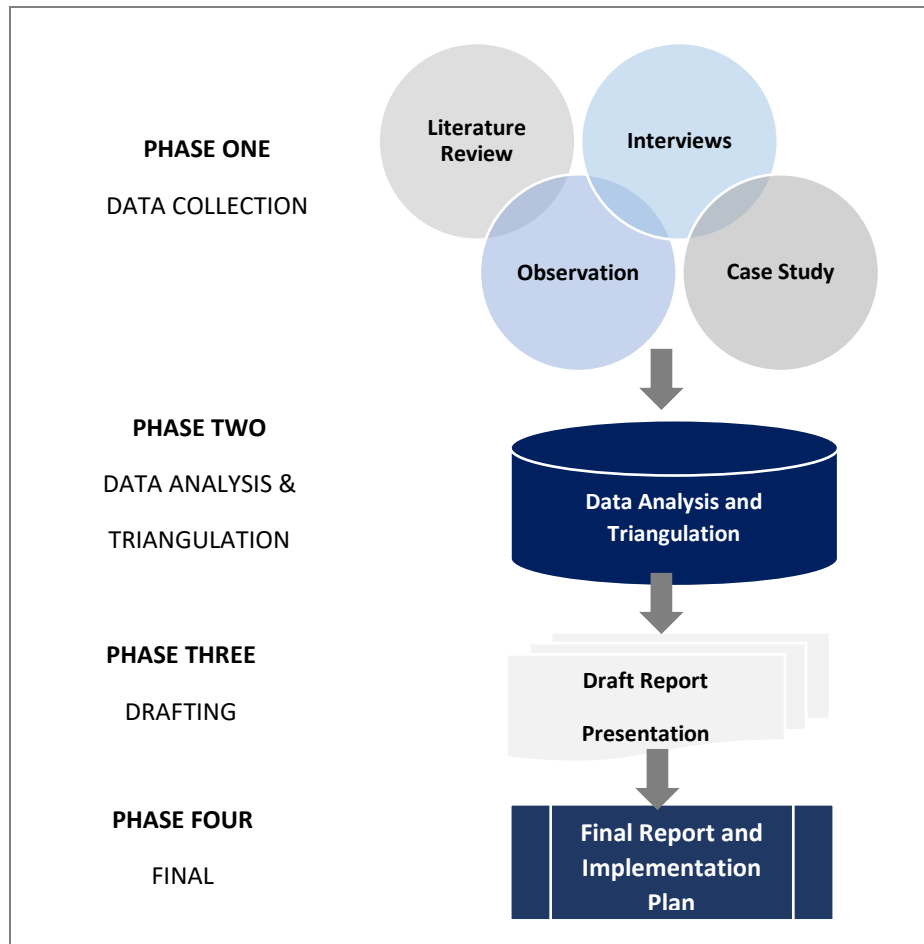


## **CHAPTER THREE: RESEARCH DESIGN AND METHODS**

### **3.1 RESEARCH DESIGN**

The purpose of the research study is to determine how retail ethnography can be used by businesses to gain a competitive advantage in the retail market. This is achieved by analysing retail ethnography approaches and methods by retailers. The research design is rooted in the ethnographic tradition which is qualitative in nature. A mixed-method approach in a single research paradigm is adopted.

The research design for the study is illustrated as follows:



### 3.2 RESEARCH METHODS

The study employs a literature review, observation, case study and semi-structured interviews. By employing a combination of research methods, the data is triangulated and findings corroborated, thus increasing the validity of the results.

Literature Review: A comprehensive literature review will be conducted for this study. Research methods used by market research firms in the retail industry are examined. These range from sophisticated, high-tech methods used by retail chains to more simple, cost-effective methods that are employed by small and medium-sized retail stores. The purpose is to present a wide range of research methods that can be chosen by retailers based on their budgets, skills and time frames.

**Interviews:** Interviews are conducted with centre managers who are involved with managing food courts in shopping malls. The interviews are conducted using a semi-structured interview schedule. The schedule encompasses broad probing questions covering key themes in the study. All questions are open-ended. This grants the interviewees the flexibility to deviate from the interview questions and discuss issues not identified by the researcher initially provided the key themes are covered by the end of the interview.

A total of seven centre managers participated in the interviews. Usually, with this type of interview, there is a tendency to reach saturation of information by about 6 to 8 interviews. Centre managers were contacted by email and telephone to secure an interview. An official introductory letter from the W&RSETA was sent to centre managers. This letter encourages participation in the study and explains its rationale to readers. The same letter was given to consumers. Fifteen food court patrons were also contacted for casual conversations.

**Observation:** Direct observation is used to observe customer behaviours in food courts. Observation enables the researchers to see consumers non-intrusively in a natural setting. It provides researchers with first-hand information.

The consumers in one food court were observed. These were chosen based on the Living Standards Measure (LSM) categories. The Sandton Shopping Mall tends to serve most customers in the LSM 08 to 10 categories. The monthly salary ranges from R14 837 (LSM 08) to +R34 019 (LSM 10). The objective is to determine whether there are differences in customer behaviour in food courts serving different LSM categories. Researchers were deployed at the food court to observe behaviours. Two days were spent at the food court. To ensure comparability of findings and assist the researchers, a set of observational questions were provided to them.

**Case Study:** A case study analysis is conducted of the recently refurbished food court in the Sandton City Shopping Centre.

### **3.3 SAMPLING**

**Centre managers:** Purposive sampling is used to select centre managers for interviews. In purposive sampling, interviewees are selected on pre-determined criteria relevant to the research issues under consideration.

For this study, centre managers were chosen based on their expert knowledge and experience of their retailing, particularly in a shopping mall environment.

Purposive sample sizes are often determined based on theoretical saturation – the point in data collection when new data no longer bring additional insights to the research questions (Pope & May 2000, p. 67).

**Food Court Patrons:** Individuals in the food court were randomly selected. A casual conversation on their impression and experiences of the food court was obtained.

### **3.4 RELIABILITY AND VALIDITY**

Unlike quantitative research, where statistical methods for establishing validity and reliability of research findings are applied, qualitative research incorporates methodological strategies in the research design to ensure the “trustworthiness” of the findings (Noble & Smith 2015, p 34).

Such strategies include acknowledging personal biases; meticulous record keeping; seeking out similarities and differences across accounts to ensure different perspectives are represented; rich and thick verbatim descriptions of participants’ accounts to support findings; clarity of thought processes during data analysis and subsequent interpretations; data triangulation, whereby different methods and perspectives help produce a more comprehensive set of findings (Noble & Smith 2015, p 34).

In this context, the study has validity and reliability in that there is integrity in the application of the research methods employed, and the precision in which the findings accurately reflect the data, as well as the consistency in the use of the analytical procedures, namely, the constant comparative method.

### **3.5 DATA ANALYSIS**

The raw data (information) from centre managers and food court customers were separately classified. The transcripts of the interview data were studied and categorised for analysis. All interviews were processed with ATLAS.ti version win 5.0 (scientific software development). The reading of the interview transcripts was followed by assigning codes in ATLAS.ti to specific words, used by the interviewees or sections of text.

A coding process was used to reduce the size of the data and categorise it into significant themes for later analysis. This process involved compartmentalising contradictions, merging the same or similar views and identifying trends and patterns in the data. Through constant comparative analysis, the researcher builds categories and also breaks them down again into smaller units of meaning. In this way, the richness and complexity of the data can be recognised. The objective of data analysis is to link and integrate categories in such a way that all instances of variation are captured inductively.

The software enabled researchers to study the data held in each code and show coding as several words or number of times a section of a primary document in ATLAS.ti had been assigned to a particular code. According to Mariampolski (1999, p. 18), the main task of ethnography is “not only to watch but also to decode human experience”.

### **3.6 CONCLUSION**

A mixed-method approach is employed by the researcher to triangulate the information from the literature review, interviews, observation and case study. This enables the researcher to acquire a holistic understanding of issues under study. Literature is abundant on ethnography and retail ethnography. These were examined.

The centre managers in shopping malls indicated during interviews that they are reluctant to publish their names in the report due to internal reasons and the competitive retail environment. Hence, their confidentiality is maintained.

With ethnography, small samples are a norm due to the qualitative nature of the research and in-depth observations. Hence, the study does not claim representativity.

The food court movements in the Sandton City Shopping Centre food court was observed for two days. The researchers also chatted to patrons to acquire information unobtrusively. All research methods described above were used to compile a case study of the Sandton City Shopping Centre food court.

**CHAPTER FOUR: ANALYSIS OF FINDINGS**

#### 4.1 INTERVIEW FINDINGS

Interviews were conducted with five managers of shopping centres. They have overall responsibility for their centre and food courts. All centre managers indicated that they prefer to remain anonymous since the shopping centre environment is highly competitive.

Snap interviews were also conducted with patrons visiting these shopping centres. A total of 10 food patrons were interviewed, 2 per centre. These were patrons in the food court. Three questions were posed to them on their impressions of the food court. They also remain anonymous.

INTERVIEWEE	ORGANISATION
Centre manager 1	Shopping Centre in Northern Suburb (Johannesburg)
Centre manager 2	Shopping Centre in Eastern Suburb (Johannesburg)
Centre manager 3	Shopping Centre (Bloemfontein)
Centre manager 4	Shopping Centre in Southern Suburb (Johannesburg)
Centre manager 5	Shopping Centre in East Rand (Johannesburg)
Centre manager 6	Shopping Centre in North Coast (Durban)
Centre manager 7	Shopping Centre in Northern KZN (Newcastle)

#### QUESTION ONE

## How important is the food court in the shopping mall customer experience?

There is consensus that the food courts in shopping centres are an important element in the overall customer retail experience. With small shopping centres, there is a tendency for shoppers to purchase takeaways and not use the food court.

Large shopping centres tend to invest big on food courts as they see the benefits for better retail sales.

Although small centre managers recognise the importance of food courts, it appears that these centres do not cater sufficiently for shoppers in the food court area.

It is apparent that food courts have a captive audience since employers in the centre use the food court for lunch-time meals.

There are opportunities for small centres to make their food courts attractive to entice shoppers to spend time and money there.

*“The food court is an important element. It is a nice reprieve for a day out or to relax, and for eating & shopping. The food court benefits from the local offices, as staff frequent the food court during lunch time. There are about 6 000 people working in and around shopping centre.”*

*“Absolutely necessary in my experience and opinion. It’s where the customer can “escape” to and relax, clearing their minds, having a convenient place to sit down, enjoy food and be social. It is a safe, neutral meeting place. Experience here is everything. The tenant mix and variety should be carefully considered and is key to the experience.”*

*“Consumers frequent malls for family outings and to relax. The food court is an attractive area. It is important to include big brands in the food court like Debonairs pizza, for example. At the Plaza itself, having a food court isn’t as important as it is at other malls. The Plaza does not have a food court currently, but individual restaurants/food outlets (based on the target market needs).”*

*“It is extremely important. It is considered the heart of the centre and meeting point for all shoppers, from both families to the young shopper. The more variety the food court offers and the better the ambience, the longer the dwell time.”*

*“It is important, but not as much at Dobsonville Mall as it is in others. Reason being, the customer base at this mall is likely to purchase takeaways. They prefer not to sit down and eat. The food court at this mall is mainly used by the staff employed at the mall.”*



Food courts are popular for meeting people and spending time together. They contribute to the overall success of shopping malls. ECE (2019, p 3) found that 40% of consumers chose a shopping mall based on the dining options offered. According to a Union Bank of Switzerland survey, people are increasingly visiting malls for meals at the food court and not to buy clothes (Thomas 2019). ECE (2019) also found that about 24% of consumers spent an hour in food courts, while about 90% spent at least 15 minutes in these areas. This proves that food courts are popular rest areas in shopping malls. Food courts are no longer an afterthought, but the main attraction which brings people into shopping centres (Sadler 2019).

Food courts are utilised as areas for relaxation, spending time with family, friends, loved ones and colleagues, completing work, and surfing the internet (often due to the free Wi-Fi). They are also used as play areas for children and families. Food courts are used to hold formal and informal work meetings or serve as waiting areas for consumers. Food service investors found that malls served as an attraction to large numbers of locals, and that the foot traffic generated was sufficient to warrant the development of eating spaces within the malls (Andrews 2008). These spaces manifested themselves in the form of food courts and more recently, food halls.

Food courts are “sales drivers” and also “services enhancers”. They benefit mall tenants by improving the image of the mall. The variety of dining options appeals to a wider target market, allowing for innovation in marketing (ECE 2019). These factors also contribute to the time spent at the mall. Because of the current shift in business from retail to food courts, as a result of easier access to fashion and retail via online shopping, mall owners are now investing in food offerings and devoting more space to entertainment and dining (Thomas 2019). It was stated by Suzette Lamont, director of client solutions at Coldwell-Banker Richard Ellis commercial real estate services and investment firm, that “it makes good business sense” to include food as a large part of retail space (Sadler 2019).

In an article by Indiaretailing Bureau, it is posited that food courts are significant in retaining the customer in the mall space for longer periods of time, as they give customers added reasons to spend time at the mall. Increased time spent by consumers in retail sites improves business as it tends to increase purchasing. This is due to the fact that it keeps shoppers away from online shopping due to increasing dwell time at the shopping centre (Sadler 2019). Providing a wide variety of dining options in a comfortable ambience is also important, as eating at a restaurant (or fast food outlet) has become a social activity and attracts people in groups (Indiaretailing Bureau 2014). Thus, it is in the best interests of a centre or mall to create comfortable and memorable social experiences for consumers, with the added advantage of increasing consumer dwell time at the food court.

Haseki (2013, p 13) categorises shopping motivations as functional motivations, social motivations and experiential motivations. He states that in current times, shopping has become somewhat of a provider of pleasure and relaxation. This is seen as the functional aspect of shopping malls being trumped by the social and experiential aspects. This draws a larger crowd of consumers and leads to the expansion of malls. Consequently, there has been more focus on innovation in malls and a variety of options in products and dining.

Cushman & Wakefield (2017) discuss that due to changing shopping habits of consumers and the rise in “experience retailing”, the percentage of comparison retail (such as fashion) as a portion of total retail is decreasing, and being replaced in part by entertainment, leisure and F&B offerings. As a result, centre owners and management need to ensure that their food courts are updated regularly such that they become inviting and exciting spaces in which shoppers may relax and enhance their shopping experience. Convenient, comfortable, clean and aesthetically appealing food courts with a wide dining variety are sure to draw shoppers and increase their dwell time in these spaces. According to Les Morris, spokesman for Simon Property Group, the main focus is to get guests to linger (Lillegard ca. 2020).

India retailing Bureau (2014) states that mall developers are increasingly attempting to provide new age consumers with a complete shopping package (or experience) inclusive of entertainment, and that the food court is a vital element of this. Forecasters expect online purchasing to increase, which adds to the pressure on retailers and landlords to create shopping experiences for consumers that cannot be replicated via online purchases (Cushman & Wakefield 2017). Thus, food courts must continue to keep up with trends to create memorable shopping experiences for consumers and retain a healthy customer base.

## **QUESTION TWO**

**What are the latest trends in food courts in shopping malls?**

There are several trends currently. Conveniences such as charging stations, lockers, large interactive screens for sports and kids play areas are becoming a necessity. In centres attracting middle to high income, there is also a move towards healthy eating options and green spaces.

In all instances, it appears that food courts should offer brands to shoppers due to the importance of brand loyalty.

*“Facilities such as charging stations for cellular phones and laptops, as well as lockers are a trend. In addition, interactive screens broadcasting sporting/popular events and other forms of entertainment.”*

*“Creating the experience through “look and feel” e.g. a marketplace, peaceful, beautiful, homely, unique. It’s no longer a fast food red and orange coloured, plastic chair, grab, eat, go environment, it’s an experience.”*

*“Having a variety of foods, convenience, and a variety of brands as well.”*

*“The introduction of entertainment for kids at the food court is also a trend. For example, Funtubbles and Bounce. This allows kids to play while their families enjoy meals, or after meals. This is also convenient (in terms of location of the entertainment within the food court). Kids also get their parents to go to the food court because of the location of the entertainment facilities. Malls should take advantage of the food court area in this respect.”*

*“We are finding lately that recognised brands are trading far better and are more sustainable than others. Novelty brands trade well initially but once the “novelty” wears off, shoppers gravitate towards the brands they know and are familiar with.”*

*“Food halls are also trending, especially internationally. Healthy or green living is becoming more and more trendy with shoppers and stores offering food that is responsibly sourced is a huge trend currently.”*

*“At this mall, certain food types are more popular than others, hence they trend better. Since people that frequent the mall are relatively poor, they opt for cheaper foods such as pies, pizzas, russians, and fish & chips. Individual spending generally amounts to between R5 and R40. Larger, popular outlets or brands at the food court include KFC, Chicken Licken and McDonald’s.”*

There are a multitude of food court trends.

**Social Outings:** Shopping trips to the mall have moved away from being errands to becoming “social outings”. These has contributed to the establishment of retail parks and shopping malls boasting fantastic food courts. They also lead to the demand for more leisure and entertainment spaces. In a case study by Haseki (2013), p 27 on customer expectations in mall restaurants, it was found that social and experiential motivations for frequenting shopping malls have now surpassed functional motivations for shopping.

According to Ahmed *et al.* (2007, p 13), shopping centres are places for socialisation and recreation. Terblanche (1999, p 24) indicates that social use spaces and interactive entertainment contribute to the major constituents of shopping centres.

**Food and Beverage:** Cushman & Wakefield (2017, p 43) state that the food and beverage (F&B) market has grown significantly. They found that merchandise retail was decreasing in its contribution to total retail and replaced by “experience retail” elements such as entertainment, leisure and F&B. Hartzenberg (2017, 72) concurs when she states that F&B are increasingly becoming the reasons for consumers’ visits to shopping malls. This is representative of consumers’ desires to amplify their shopping experiences by incorporating entertainment, leisure and social aspects into shopping.

Although the food trends were mostly observed in the United States and Europe, they mirror themselves across the globe. The general consensus is that ever-changing consumer preferences and expectations require originality and constant innovation and for retailers to maintain a competitive edge.

Versolatto (2019, p 45) discusses some of the top trends for 2019. They include fermented food and drinks, craft teas, cannabidiol-infused drinks, bug-based foods as well as memory-enhancing foods. Other F&B trends, as described by Naylor (2019, p 1), include meat-free meals, fermented drinks such as kefir, meals containing hidden vegetables and goat meat meals.

**Ambience and Experiences:** Cushman & Wakefield (2017) state that food outlets focus more on experience than food. Consumers desire themed venues to complement their food, enhance their experience and create memories. This is achieved through careful selection of the décor and music. These combined with variety, innovative and unique elements add a modern touch and maintain fresh retailer and food court images.

Some food outlets allow customers to create their own meals. This is an innovation as it allows consumers to experience a different meal combination or a completely different meal for each visit. Some consumers have jumped on the food court bandwagon merely because everyone else is doing it, and due to the fact that it has become a worldwide phenomenon and trendy to do so.

Petermans & Van Cleempoel (2009, p 2) state that authenticity and originality are key factors in creating memorable customer experiences. Retail spaces should be designed to create atmospheres that are conducive to consumers' needs.

Simply adjusting the menu no longer affords a competitive edge in the restaurant industry. Studies demonstrate that design features such as bright lights and music affect the retailer's profits (Andrew 2007, p 30).

Nicasio (2018, p 45) states that consumers are increasingly drawn to attractive retail spaces. She mentions that consumers want to visit a space in which they can take photographs to post details of their experiences on social media. However, this trend is not limited to the venue itself, but extends to the use of beautiful props, utensils and the food itself.

Social media fuels the desire for beautiful frozen treats. Consumers want to be able to take photographs of these attractive desserts to post on social media. Offering beautiful props and food allow consumers to photograph their food and the utensils while documenting their experiences (Nicasio 2018, p 46).

**Food Courts and Food Halls:** A *food court* is defined as a food area with a central, communal seating or dining area, with food stalls at its periphery, and which relies heavily on fast food outlets. A *food hall*, on the other hand, is defined as a food area with a great diversity in culinary offerings, often inclusive of alcohol, relying more on authentic and artisanal foods, often operated by a celebrity chef or popular restaurateur. However, what food courts and food halls have in common are that they are communal centres where people gather to dine, relax, and spend time with others (JLL 2017).

Food courts are becoming increasingly popular as they offer variety sought out by consumers. Consumers can choose to have an Asian meal and a completely different type of food for dessert, perhaps an infamous Middle Eastern baklava. Another reason why variety is a key contributing factor to food court success and trends is that consumers visiting food courts, together in a group, with individual tastes and preferences can still enjoy a meal and an outing together. Food courts allow individuals to make purchases from their preferred retailer but still be seated with their group.

**Healthy Eating & Sustainability:** Consumers are more health conscious and have specific dietary needs such as gluten free, low-fat and low calorie. Other common dietary preferences include organic foods and banting-friendly meal options (Muller 2017, 4).

A trend to reduce waste at food retailers is emerging steadily (Cushman & Wakefield 2017, p 37). Some retailers discount food that is not sold by the end of the day, or which is still available from the previous day's preparations. Consumers are constantly

attempting to get more value for money and make a trade-off by purchasing food from food stalls that has not been prepared on demand but is still sufficiently fit for consumption. An innovative solution to food waste problems is that adopted by a UK-based company called Rubies in the Rubble. The company uses food waste to create relishes and preserves. This reduces food waste.

Consumers are becoming attracted to ethically sourced and sustainable products and business practices. Starbucks donates any unsold food products to charitable causes and advertises this in-store. This practice has a two-fold benefit – it assists the underprivileged, while reducing waste (Hartzenberg 2017, p 67).

Food stores are required to meet the demands of the ageing population which is expected to rise to about 9.8 billion by 2050. They also have to address the issues of rising rates of diseases such as obesity and Type-2 diabetes. Consequently, the food sector is under pressure to respond to the issues of health, ageing and their link with diet by aiming to deliver products which are able to keep consumers healthier (Askew 2018, p 39).

**Comfort:** Shopping malls are creating more comfortable spaces. Most have non-smoking areas, facilities for mothers and babies, children’s play areas and wheelchair friendly facilities.

Successful food courts also take into consideration the different age groups in their design and offerings. These food courts are usually those which appeal to families consisting of grandparents and parents with teens and young kids.

One of the reasons consumers visit shopping malls is to rest. Rest is synonymous with comfort.

**Pop-Up Retail:** Another popular trend in food courts and malls is the use of pop-up retail units (JLL 2017). According to Wiley (2019), pop-up retail is “nothing more than a short-term retail outlet”. This concept requires mall owners to afford tenants greater lease flexibility, but also results in greater risk on the owners’ parts of having to deal with unproven tenants. The pop-up retail concept has advantages with respect to the mall owner in terms of providing consumers with constant variety and new products to look forward to while allowing new vendors to test the market with the benefit of a lower financial risk.

**Energy Efficiency:** Another trend in malls, which essentially filters down to food courts, is that their systems are becoming more energy efficient. This reduces their impact on the environment, while saving costs. Shopping centres impact on the environment greatly due to high electricity consumption and energy-intensive systems. The average consumption of energy for shopping centres was found to be around 300kwh per square metre (SINTEF, 2016).

Dubai's City Centre Mirdif Mall is 40% more energy efficient than others in the area. It reduces energy costs by \$350 000 a year. Energy efficiency was extended to their food court with the aid of smoke and heat detectors installed in cooker hoods to automatically adjust fan speed. This instalment saved 55% energy and 46% is saved on chilled water (JLL 2017).

Johannesburg's Melrose Arch and Cape Town's Harbour Arch green building initiatives include water-saving measures and refuse recycling. Melrose Arch is architecturally designed to utilise more natural light, thereby reducing the demand on electricity. Harbour Arch harvests rainwater, thereby decreasing the demand on municipal supplied water (Guedes ca. 2019).

Similarly, at Baywest Mall in Port Elizabeth, South Africa, prismatic diffusers are incorporated in the architecture (Bizcommunity 2015). This feature can be described as small openings situated in the mall roof which allow the entry of vast amounts of natural light.

### QUESTION THREE

#### What are characteristics of a great food court in a shopping mall?

Some of the characteristics that interviewees identified for great food courts are the following:

- Ample, comfortable and spacious seating arrangements.
- Diversity in the tenant mix to give greater food choices.
- Clean restrooms are non-negotiable.
- A central location with easy accessibility.
- Safety and security.
- Catering for groups that frequently visit the centre is important to win loyalty.

For instance, halaal food in centres with a high density of Muslim shoppers is a fast-growing market. This will also apply for shoppers who want to eat healthy. The cost of food for shoppers in low-income areas should be factored in the retail mix.

- Entertainment for adults and kids.
- In trendy centres, shoppers want to be "seen".

*"Seating should be arranged such that there is ample space for walking and queueing.*

*There should be a great tenant mix, offering consumers variety. Food traders should provide something suitable for every palate.*

*“Experience plus a good combination between Fast Food and Healthy Options, quality restaurant food vs value family offering.”*

*“There is a large Muslim clientele at Sandton City, therefore availability of halaal meals is important. There are about 4 or 5 halaal vendors. Catering for all the consumer needs and wants is an important element.*

*There needs to be clean restrooms at the food court so that consumers do not need to walk a distance to access them.”*

*“The location of the food court in the mall setting is important. It should be centralised, as people do not like to walk a distance to access the food court.*

*It should be neat and tidy.*

*There should be sufficient seating, especially at month end when the court is busier.*

*The overall appearance of shop fronts should also be neat and tidy.*

*Cleanliness is an important factor, especially where food is concerned.”*

*“It all depends on the Mall and their specific shopper. For a family-orientated mall like Mimosa Mall, we try to ensure that food tenants we place have good kiddies’ areas.*

*For a mall that caters to the trendy shopper, they would need to ensure their tenants are where shoppers want to be seen (shopper image has become a trend).*

*Overall, offering shoppers a variety is always a good bet.*

*Accessibility and flow of shoppers is also extremely important.”*

*“A good food court should be efficient (in serving consumers) and should not be too congested. When it is congested, it becomes risky due to theft at the mall. Handbags etc. are stolen more easily. Consumers prefer to purchase food and leave the court.”*

It is widely agreed that food courts or F&B now act as anchor tenants in a mall setting (Cushman & Wakefield 2017; JLL 2017, Kumar 2018). In an article by Kumar (2018), Sanjeev Mehra, Vice President of Quest Properties India Limited states that food courts are currently the “very nerve centre of a mall”. He discusses that the food courts in malls now generate incessant footfalls daily, which have resulted in their becoming anchors in malls. This is an indication of their importance in today’s mall setting. As a result, food courts need to be attractive spaces for consumers to enjoy spending their time therein.

In an ECE (ca. 2019) report, Managing Director (centre management) Joanna Fisher discusses how food courts are vital for the “feel-good factor” in a mall or shopping



centre. She explains that consumers are able to enjoy themselves in these spaces “according to their own interests”, so long as the conditions and atmosphere are conducive. In a study by JLL (2017), it is claimed that one of the benefits of a quality F&B offer is the improvement of the mood of shoppers. The study posits that a happy shopper is one who is more likely to spend. Therefore, the other mall tenants also stand to benefit from a good food court.

There are a number of factors which contribute significantly to the consumer perception of what constitutes a great food court in a shopping mall or centre. Crucial to the success of food courts in shopping malls are various elements. These include the following (ECE 2019):

<b>Location</b>	The location of the food court. It should be accessible and a comfortable distance from merchandise stores.
<b>Tenant mix</b>	A variety of dining options appeals to a wider target market.
<b>Quality</b>	The food should be of quality.
<b>Atmosphere</b>	Elements that affect the ambience of a space such as the lighting, music, décor and noise levels.
<b>Value for money</b>	Consumers want to get the most out of their spend.
<b>Efficient service</b>	Consumers do not want to be kept waiting while hungry.
<b>Seating capacity</b>	Adequate seating for consumers.
<b>Cleanliness</b>	Consumers want food prepared under hygienic conditions and that they can consume their food in hygienic spaces.
<b>Cashless payment</b>	Consumers often make purchases using debit and credit cards.

In terms of location, food courts are generally situated at the centre of a shopping centre or mall (Carter & Vandell 2005; Bradley 2006), as this area tends to have the highest foot traffic and often has its own entrances, rendering it favourably accessible. In an article by Bizcommunity (2019), Simone Homan, regional manager of Spire Property Management, states that typical food courts no longer make the cut, and suggests that exciting dining options be offered. Consumers constantly want to see innovative and new F&B options. According to Kaylin (1973), one aspect of the ideal tenant mix for a shopping centre is to provide sufficient variety in the tenant mix to create the optimum attractiveness for the consumer. In a study by JLL (2017), one of the landlords interviewed stated that in order to have a great food experience, great food operators are required. Hence the correct tenant mix is essential for a great food experience for consumers.

Having a great tenant mix in a food court and a wide variety also means there is more room to accommodate different dietary preferences of consumers. Some follow strictly halaal diets, while others are strictly vegetarian, vegan or even have food allergies and intolerances. These dietary requirements should be catered for to ensure further success of food courts. Blogg (2015) claims that one of the trends in food courts is to provide healthier options, as well as a wider variety of allergy-sensitive options such as gluten-free and dairy-free products or meals.

According to Cushman & Wakefield (2017) quality and variety of food offerings are most valued by customers. Consumers are becoming increasingly aware of the quality of food offered, due to being more health-conscious. Consumers also want to ensure that they are receiving value for their money, by receiving good quality food in fairly sized portions. In a JLL (2017) study, Suk Singh, Chief Development Officer at Bloomin' Brands, gave the example of the Cheesecake Factory in the United States. He explained that although pricing for portions is higher than many of the other diners, the quality and portions sizes are much greater. Resultantly, the average diner feels as though they are receiving greater value for their money.

Consumers also enjoy attractive atmospheres at food courts, which can increase their dwell time in these spaces. The 'atmosphere' of the food court includes several sensory factors such as lighting, décor, music and the levels of noise. Customers value these aspects in a food court (Kusumowidagdo 2015; Cushman & Wakefield 2017). Sit *et al.* (2003) state that atmospheres tend to add more excitement to a shopping experience, and thus should be paid careful attention by centre management.

Consumers also appreciate efficient service at a food court. Cushman & Wakefield (2017) claim that customers value short waiting times when being served, while Kumar (2018) states that food court operators ensure quick service at the food court. It is discussed by Bradley (2006) that the term 'services' can be described as "employee courtesy, friendliness and knowledge of products". He states that the concept can also be extended to encompass 'communal services' which include baby changing facilities, escalators and security. The provision of clean lavatories and the availability of handwash stations (Kusumowidagdo 2015) also improve the conditions of a food court.

On the note of cleanliness, consumers are more hygiene-conscious currently, and require that the environment in which they enjoy their meals and take rest is hygienically clean (JLL 2017). According to Kumar (2018) food court operators ensure cleanliness and hygiene since "food service requires much more rigorous cleaning and inspection" as compared with other segments of the centre or mall.

In order to sufficiently accommodate all its consumers, and so that consumers are not expected to wait for available seats, food courts need to be equipped with adequate seating facilities. During an ECE (ca. 2019) customer survey in 2015, some of the success

factors of food courts which emerged included high seating capacity and cashless payment options. We are currently living in an era where consumers want to be able to make quick and easy payments, without having to carry around large amounts of cash for security reasons. As a result, those outlets which offer cashless payment options (payment via debit or credit card, for example) usually perform much better and are less likely to lose any sales from customers that do not carry cash.

Another trend observed in more comprehensive food courts is the inclusion of entertainment. According to Howarth (2016) food courts were observed to include several television screens for the entertainment of adults. These televisions generally broadcast live sports matches, music videos and occasionally, animated programmes. Having some entertainment in the vicinity of the food court has become somewhat mandatory (Miraj Meridian Mall 2019). Kids entertainment and activities in and around the food court are also one of the features of successful food courts. These include play areas and mini rides or games for children to stay occupied while they wait for their meals or while their families relax in the food court. Including these entertainment areas within the food court also gives parents an opportunity to multi-task – they are able to relax while keeping a watchful eye on their kids. Having entertainment within or nearby the food court also creates a more attractive space for consumers while they enjoy their meals.

Since we are living in a generation which requires constant entertainment, and which more often than not requires technology, there are further amenities which can be included in a food court for the convenience of consumers. A food court with Wi-Fi and free charging stations for laptops and cell phones are considered important (Cushman & Wakefield 2017) and will attract more consumers to the food court.

#### **QUESTION FOUR**

**How do you evaluate the performance of a food court in a shopping mall? What methods are employed?**

Shopping centres utilise a variety of methods to evaluate the performance of tenants and the success of the food courts which includes:

- Turnover of tenants
- Trading density (square metre x turnover)
- Monitoring through social media
- Mystery shopper feedback

*“Unaudited reports are considered on a monthly basis, which provide information such as occupation costs and profits. Annually, audits are performed to produce a turnover certificate for each vendor. These audited and unaudited reports are compared.*

*Trading density per m<sup>2</sup> is also monitored against industry and portfolio benchmarks. Vendors’ performances are monitored against others at the food court. If they are not performing adequately, there are investigations into the reasons why this is the case. Quality, presentation and meeting shopper profiles are evaluated.*

*The social media feed is monitored and any issues/complaints arising on these platforms are dealt with.”*

*“People Count, Turnover, Social Media posts/blogs (experience & participation), Visual Inspections (Happy Factor).”*

*“Performances of retailers are based on trade densities (square meterage vs. turnover per outlet).*

*The use of advertising and promotions to cater to the needs of shoppers are also assessed. This is due to the fact that Phoenix Plaza is bargain driven. Thus, consumers look forward to bargains and promotions which draw a crowd.”*

*“We compare turnovers year on year. We also compare turnovers of the same stores across our portfolio to compare trading.*

*We send in mystery shoppers and they are tasked with specific issues to look for. We then provide this feedback to the tenant.*

*We also look at things like Trading Densities per square metre and Cost of Occupation, and then compare these to Industry averages.”*

*“Store performances are monitored purely using turnovers on a monthly basis.”*

Monitoring the performance of the food court in a shopping centre is crucial to centre management and the landlords in order to ascertain whether the food court is in fact running successfully. It is of great importance to monitor the performance of each outlet in the food court to ensure that there is a healthy synergy amongst the outlets. As it has

been found in several studies, retailers have an effect on those around them, and should therefore be complementary to each other as this results in greater success and increased footfall (Casazza *et al.* 1985; Bruwer 1997; Ndebele 2017). The same can also be applied in the case of the food court. It should also be noted that in order for the centre to run successfully, it is vital for each retailer to also run successfully, as each retailer contributes to the overall footfall of the centre.

There are various methods utilised by centre management to monitor the performance of the food court outlets and the food court as whole. Different centres employ different methods to achieve this. Some of the most common methods, as found in this study, are monitoring of tenant turnover, trading density, monitoring of social media to establish consumer experiences and satisfaction, and mystery shopper feedback. The latter two methods are especially significant with regard to obtaining honest, uncensored consumer feedback from actual consumer experiences. This information can then be used to gauge specific details about which areas of performance need attention and perhaps closer monitoring.

The 'turnover' or sales turnover of a company (or store) is described by Debitoor (ca. 2020) as "the company's total amount of products and services sold over a given period of time", usually a year. According to Baggett (ca. 2020), the inventory turnover rate (ITR) of a restaurant is the number of times the restaurant has sold "its total average inventory over a period of time". According to the author, the ITR can be used to evaluate how well a restaurant is performing in relation to other concepts as well as to the industry holistically. Trading density is defined by Muller (2006) as "sales turnover achieved per rentable square metre" of a shopping centre or store. It can therefore give an indication of how well or poorly a store in the food court is performing, when applied to the food court outlets in a shopping centre. As Muller (2006) suggests, the trading density indicates the profitability of a store or shopping centre.

With regard to using the mystery shopper feedback method in evaluating food court and food outlet performance, there are several benefits for retailers. As outlined by Phibbs (2015), *The Retail Doctor*, some of the benefits include the following:

- (i) service performance can be monitored and measured;
- (ii) customer retention can be improved;
- (iii) employees are made aware of significant aspects of customer service;
- (iv) facility conditions can be (effectively) monitored;
- (v) the quality of product and service delivery is ensured;
- (vi) it enables the support of promotional programmes;
- (vii) it enables competitive analyses between different locations;
- (viii) training requirements and sales opportunities can be identified;
- (ix) positive front-line customer relationships are ensured;
- (x) it enables enforcement of employee knowledge and integrity; and
- (xi) the hustle by employees to meet customers is supported.

However, this method can sometimes have the drawback where the mystery shopper does not in fact visit the outlet/s before compiling feedback. Therefore, if this method and its results are to be applied productively, management needs to ensure that the mystery shoppers are in fact visiting the outlets before reporting on the actual experience for feedback to be considered valid.

According to Negri (2015) social networking sites have the ability to effect numerous strategies. These strategies allow retailers to gather data on their target markets effectively. In an article by Infiniti Research (2019), a popular market intelligence firm, there are several benefits discussed for retailers, derived from social media monitoring services. The company lists these benefits as follows:

- (i) **enhanced social listening** – this involves paying careful attention to what consumers are saying about the retailer’s brand. This allows retailers to analyse their audiences and identify niches in their offerings according to customer expectations.
- (ii) **improved customer interactions** – providing excellent customer experience is essential to retailer success. Retailers should seek every means of communication which will allow them to become more approachable to their customers. Social media monitoring assists retailers in keeping on track with consumer interactions and tending to enquiries more easily.
- (iii) **discovery of engagement opportunities** – social media monitoring aids retailers in finding further opportunities to engage with their target market. Retailers are thus advised to turn their focus to “incoming brand-relevant messages”, despite whether these retailers have received a direct mention or not.
- (iv) **interaction with top brand advocates and consumers** – retailers can take advantage of social media monitoring services with respect to interacting with brand influencers and advocates more easily (to promote their brands). Moreover, monitoring a retailer’s interactions with key consumers can serve as a platform for their inclusion in marketing efforts of the retailer.

Prior to commencing with social media usage for brand promotion, retailers should be aware that copious amounts of time and energy are to be invested in this practice to create and maintain the correct brand image. It is therefore important to have a strategy to assist in the effective use of social media. In an article by James Scherer (2016), the 11 steps to be followed in a social media marketing plan (SMMP) are delineated as follows:

- (i) **Establish goals for the SMMP** – the retailer should identify what they want to achieve from the SMMP, which will in turn direct them as to which social media platforms to use. The main objectives which justify a SMMP include the need to generate more brand awareness, to drive sales, to generate leads and to create a sense of community surrounding the brand.
- (ii) **Decide on which platforms to use** – Scherer (2016) suggests retailers consider how much time they have available for social media, resources in

terms of being able to create a visually attractive account, and whom their target audience is. These will serve as a guide in order to determine which platforms will be used most effectively. Popular social media platforms include Snapchat, Instagram, Facebook, Twitter and so forth.

- (iii) **Pages and profiles should be optimised** – in order to achieve this, Scherer (2016) offers a checklist to be used, which suggests the following:
  - (a) headers and profile images be optimised;
  - (b) complete company information be provided;
  - (c) the Facebook page URL be customised;
  - (d) a Facebook page call-to-action (CTA) (text, image or some button which draws customers' attention, prompting them to take action) be added;
  - (e) search engine optimisation be executed (actions taken to increase site visibility and resultantly, website traffic);
  - (f) promotional and best content be pinned to the top of pages/sites; and
  - (g) Facebook tabs be added.
  
- (iv) **Boost social media following** – The author suggests some promotional contests to be run or methods to be implemented in order to boost the retailer's following. This can be accomplished using the simple Facebook Sweepstakes contests, Instagram Hashtag contests, referral promotions where contest entrants share the contest details with their friends or followers, and a photo submission contest (the details of which are to be shared with friends or followers).
  
- (v) **Use the right tone on the platforms** – It is explained by Scherer (2016) that people respond better to others who sound similar to themselves. He warns that people won't respond well to a brand which is either faceless or to a tone which is too casual. Thus, a balance needs to be struck. He suggests that the retailer identifies three brand voice characteristics, which should be considered each time a social media post is made. Information posted should be relevant and appropriate for the target audience.
  
- (vi) **Develop a social content calendar** – Because posting social media content is time consuming and can become complicated, especially if a retailer posts on multiple platforms, a content calendar aids in maintaining order and keeping track. According to Scherer (2016), a content calendar gives a SMMP an outline of the content that requires posting, on which platforms they are to be posted and when.
  
- (vii) **Identify influencers** – According to Scherer (2016) "social media influencers can make or break a social media marketing plan". Being acknowledged by a retailer's industry leaders opens doors for brand awareness, content engagement, trust and legitimacy according to Scherer (2016). If the correct influencers are involved with a retailer's brand, there is a manifold increase in its promotion.

- (viii) **Find and create content** – social media content sharing is primarily made up of two things, i.e. curated content and created content, according to Scherer (2016). *Curated content* refers to content sourced from other sources, bearing some relevancy to the retailer’s business, but not written or created by it. He also suggests that using content from brand influencers provides useful content. *Created content* refers to content developed or constructed by the retailer itself for its fans. Scherer (2016) suggests that prior to creating content, retailers should consider what interests fans, what their (fans’) pain points are (the problems experienced by a business’s customers), the kind of content fans want to view, what aspects of the industry are complex (and require explanation) and what fans require to accomplish their goals.
- (ix) **Posting** – Scherer (2016) discusses that the best time to post social media content is 8 am to 9.30 am and 1 pm to 4 pm, from Wednesdays to Sundays. He explains that this is due to findings that majority of employees complete most of their work in the three hours before their lunch break, and in the last hour before leaving work. It was also found that employees tend to complete the majority of their tasks from Mondays to Wednesdays. Thus, posting content during the times employees are more free results in a higher probability of posts being viewed.
- (x) **Tracking** – It is of vital importance to keep track of all content posted to achieve the best results. Scherer (2016) discusses that it is pointless implementing a SMMP if results achieved cannot be tracked. Tracking involves keeping on par with aspects such as web traffic generated by a page/account, page/account or post link shares, as well as page/account or post likes.
- (xi) **Automate** – the use of automation tools assists with SMMP scheduling days in advance, sparing a retailer time and money. Scherer (2016) discusses that some of these tools include posting templates, content calendars, image creators and social share toolbars to be embedded in the site.

## QUESTION FIVE

### How do you measure footfall (traffic) in the food court?

Foot counters at entrances seem to be a popular choice. In the large shopping centres, measurements tend to be camera-based.

*“Footfall measurements are camera-based, as this is more accurate than using beams. The flow of shoppers is monitored.*

*Shopper demographics are also monitored via the cameras to determine the gender, race and age profiles of shoppers. Thus, cameras are more useful.”*



*“Flow meters, CCTV”*

*“Usually, malls make use of foot counters at their entrances. However, the Plaza does not have foot counters for the food outlets and there is no food court area.”*

*We have foot counters and flow counters, and we compare to previous years.*

*“There is no system in place currently, as the food court is situated outside the mall. Currently, only retail outlets are able to monitor footfall. There are about 5 stores that have such systems in place. The mall still needs to develop such systems for use at the food outlets.”*

Retailers require footfall measurements for their businesses in order to ascertain the number of customers and potential customers visiting their stores during set periods of time. Aggregating such information can aid retailers in establishing a number of reasons for the phenomena which may occur at their stores and assists with problem-solving with regard to aspects where a discrepancy is observed. Monitoring foot traffic is also especially useful to centre management, as it allows them to determine the number of visitors to the centre and to different areas of the centre. The interval during which footfall is recorded or monitored may differ greatly between retailers, and could be as short as 15 minutes or as long as a month.

According to an article by Wadsworth (2019), businesses are employing electronic systems to monitor and count footfall through their stores and then applying the data in relation to other sectors of business. Nicasio (2014) points out that these systems enable retailers to increase consumer engagement and thus sales. She discusses how these data recording systems allow retailers to monitor consumer behaviour within the store, which gives insight into how to improve store layout, marketing and the overall customer experience. Rhombus Systems (2018) explains that understanding footfall is vital for retail success. The company claims that businesses with an appreciation for footfall measurements are in a position to thrive due to their understanding of aspects such as space utilisation and its “impact on safety, employee wellbeing, company efficiency” and so forth. All this data can be determined from counting foot traffic and then analysing it for further insights. RetailFlux (2019) explains that most businesses keep track of their revenue in monetary terms, but that the “foot traffic is the key”.

Talantzis *et al.* (2012) discuss the various types of people tracking systems available and the basic principles on which they operate. They can be broadly grouped into four main categories:

- (i) Pressure sensors – these sensors are quite accurate in terms of locating people but are positioned sparsely. For example, sensors installed under entrance mats.
- (ii) Motion sensors – these sensors indicate only presence of people in the space, but do not give information concerning the number and exact position of targets. For example, flow meters.

- (iii) Visual sensors – these sensors are cameras, which on their own offer “localisation on the image plane” but are able to yield 3D positions of targets in combination with other cameras. For example, security cameras.
- (iv) Audio sensors – these sensors are microphones which are able to provide localisation when used in pairs at least, by producing an estimate of the direction of the arrival of sound. A disadvantage of using these sensors lies in the ability of the background to generate reverberation and occasionally noise, interfering with data gathered.

The drawback of most counting systems used currently is that they mainly count the number of people and nothing more. However, understanding how to manipulate these systems or the data which they provide will assist businesses and centre management in deriving far greater benefit from the monitoring systems. Wadsworth discusses that counting traffic enables retailers to determine the ‘conversion ratios’ of their stores. This is defined as the total number of sales transactions divided by the total store traffic (number of persons visiting the store) (Wadsworth 2019; Erply ca. 2020). This gives an indication of how many customers (or visits) to the store are converted to sales (RetailFlux 2019).

Nicasio (2014) discusses that there are several different companies which specialise in foot traffic analysis and assist retailers in analysing data gathered by monitoring systems. Footfall data is aggregated through various media such as Wi-Fi signals, security cameras, manual clickers, payment systems, infrared people counters and so on (Nicasio 2014; Rhombus Systems 2018). Wadsworth (2019) claims that once retailers begin to use traffic counting systems, they will immediately uncover new ways in which to analyse and optimise their businesses.

Once traffic monitoring systems are in place, a number of important themes emerge from the data collected. According to tech expert David Strom, interviewed in an article by Nicasio (2014), there are some useful and important data that retailers should gather from these systems. These include dwell time in a store (or outlet), average times at which purchases are made at a certain time of day or on a certain day of the year, the sections of a store which are visited the most and least, where about customers live or work with respect to the store, and comparisons of cross-store data.

People counting or footfall tallying can indicate matters such as which area of a store receives the greatest or least footfall, allowing retailers to identify reasons for both cases (Nicasio 2014; RetailFlux 2019). Also, an important concept that can be grasped from the data is when a store or outlet receives its peak traffic flow, which can aid the retailer in establishing whether they are adequately staffed during those times of day (Nicasio 2014; RetailFlux 2019, Wadsworth 2019). A retailer can optimise staffing levels according to this data (RetailFlux 2019; Wadsworth 2019), determine whether they are understaffed or paying too much for unnecessary labour during off-peak times (Wadsworth 2019), employ more sales associates when there are more visitors in the store (Erply ca. 2020), and resultantly reduce inventory/sales losses (RetailFlux 2019; Wadsworth 2019). Other information which can be ascertained from gathered data

includes customer behaviour (RetailFlux 2019), checkout time taken at the store which will assist retailers to streamline their checkout processes in the event that these times are longer than the industry average (Nicasio 2014), as well as what effect promotions and advertising efforts in store have had on conversion rates (Wadsworth 2019).

Additionally, footfall data aggregated from monitoring systems can be manipulated to provide further benefits to retailers. The data can be used to capture the attention of customers (RetailFlux 2019) by determining, for example, which store displays attract the most attention and result in the highest sales (Talantzis *et al.* 2012; Wadsworth 2019), improve store layout (Wadsworth 2019) and ensure the store environment is accessible and adaptable to consumers (Talantzis *et al.* 2012), improve security in order to prevent theft (Talantzis *et al.* 2012; Wadsworth 2019; RetailFlux 2019), boost foot traffic (Wadsworth 2019) in order to improve conversion rates (RetailFlux 2019) and create a more interactive environment for customers in terms of entertainment (Talantzis *et al.* 2012). Nicasio (2014) advises that external store factors should also be considered when analysing footfall data, such as “weather, environment, time of year” and so on. These factors also affect the footfall at a store and centre. For example, in the event of rainy weather, people are less likely to do their shopping or visit the malls if these visits can be postponed.

## QUESTION SIX

**Do you determine the tenant mix in food courts? If yes, how?**

The most common approach to determine tenant mix is to monitor the type of tenants that trade well through market research. This gives the centre an indication of shopper preferences.

*“Yes. Shopper demands and needs are monitored, as well as the food categories that trade well. For example, since there is a shift toward healthier eating, Kauai is popular. Therefore, there is an ongoing analysis of the target market.”*

*“Catering for as many customers possible in terms of taste and affordability (relative to your market) and variety.”*

*“The marketing department does not have a say in the tenant mix. Tenant selection is done by the shopping centre managing agent.”*

*“By default, yes, the Landlord does. However, it is informed by things like Market Research and what the shopper requests, if potential tenants are willing to be placed at certain locations, if Franchisees are available and also stores that are in your immediate catchment area. This is because a lot of National tenants will not place a specific store in a certain radius from another store.”*

*“Only to a certain extent. An ideal layout is developed. However, implementing this plan is a challenge due to the costs involved. The layout does not always take shape according to the ideal plan. Sometimes tenants are used to fill up spaces based on vacancies and revenue. Sometimes, tenants need to be relocated due to performance and depending on success rates. Tenants do not approve of relocation as the layout and branding changes associated with relocation incur large costs. These stores then lose trading hours as a result. Therefore, they prefer to wait till their leases expire to relocate. This contributes to the tenant mix.”*

Finding the ideal tenant mix for a centre is not an easy task for management and centre developers. It is widely believed that finding the ideal tenant mix is an art (Hernandez & Bennison 2000; Yuo *et al.* 2003; Ndebele 2017). It requires a combination of trial-and-error, experience, common sense or for management and developers to use their intuition (Greenspan 1987; Anikeeff 1996; Yuo *et al.* 2003; Yiu & Xu 2012; Garg & Steyn 2015). Oftentimes, management has to assess which tenants are performing well or which types of tenants receive the best response in a centre, specifically in the food court. Those that perform well remain at the centre while others that perform poorly may be forced to close down their operations if they are unable to afford the rent. Therefore, it is not solely the decision of management and developers to determine the entire tenant mix.

The tenant mix is said to be one of the most crucial factors, if not the foremost factor, in determining the success rate of a centre (and food court) (Anikeeff 1996; Garg & Steyn 2015; Ndebele 2017). Kumar (2018) states that food courts are an important aspect of the sustenance and success of shopping malls. The Institute of Real Estate Management (1990) is of the belief that there is no optimal tenant mix which exists, but that the tenant mix in each centre (and therefore in the food court) should be tailored to meet the needs of the centre and its consumer base. Thus, great effort should be made to get the tenant mix of the food court right, and to ensure that it is well-suited to the target market being served.

If the right tenants are placed in the food court, this should increase dwell time of customers and draw a larger crowd, as the food court will be made more attractive to the target market. Resultantly, this will have the added benefit of increasing expenditure at other retailers outside the food court when there is an increase in dwell time (Bradley 2006). Other factors which should increase the foot traffic through the food court are a

variety in cuisines and accommodation for various dietary requirements. This will require the inclusion of more variety in the tenant mix to meet such requirements.

It is important for management to consider the synergistic effects of tenants on each other when selecting tenants for the ideal tenant mix (Kaylin 1973) or when approving leases. Tenants have an effect on those around them and should be complementary to each other in order to maintain good synergy (Ndebele 2017). According to Greenspan (1987) and Kirkup & Rafiq (1994) the synergy which results from the tenant mix not only drives success of individual tenants, but also leads to the success of the centre holistically.

## QUESTION SEVEN

### What are some of the things that the shopping mall can do to improve the food court experience?

Interviewees identified cleanliness, lighting, accessibility, security, entertainment, sustainability as key factors to improve the retail experience.

*“Shopping malls should have comfortable seating, screens to broadcast sports and entertainment, and should be well lit. Cleanliness is an important factor. The tenant mix (in terms of variety) is critical. There is also a strong drive toward sustainability, therefore a waste separation system should be implemented/present. This can be achieved with separate bins for paper, and plastic, for example.”*

*“Make the food court a theatre of options and choices. Set aside some space for entrepreneurs to come and experiment. In this way your food court will always have something unique, new and fresh to offer and improve your CSI as it assists in economic development.”*

*“Besides the tenant mix, accessibility and flow are important. Also, aspects such as cleanliness, adequate seating in common areas, lighting, and customer experience by ensuring tenants provide the best customer service to patrons (are important elements to consider and develop).”*

*“In general, a mall should ensure cleanliness at the food court at all times.*

*Security is also an important element. Shoppers are now more wary and safety is becoming a more important factor. Consumers at the food court will be more at ease with visible security in the form of security guards. Those consumers with young children will also appreciate heightened security measures as they will feel safer. It is very important to these consumers.”*

*“The mall could have as many major food anchors as possible.*

*There should be a variety of choices for consumers, especially in terms of anchor stores. At Dobsonville Mall, King Pie is one of the major anchors.*

*The affordability of anchor stores is also an important element to consider. For example, old-fashioned fish & chips trades better than and is preferred over Fishaways at the mall due to the affordability.*

*Based on customer feedback, the mall is currently in the process of trying to secure a Nando’s outlet for the mall in the future.*

*The mall uses customer feedback and requests, as well as track records of customer demands (to determine successful elements to be included).*

*Social media can be used to draw up targets.”*

In a study by ECE (JLL 2017) conducted on German shopping centres, it was found that 40% of customers based their preference of shopping centres predominantly on the available dining options. Food courts have also been found to increase shopper dwell time (Cushman & Wakefield 2017; Miraj Meridian Mall 2019) or draw shoppers to the mall resulting in their spending at non-food retailers as well. According to Bradley (2006) research indicates that the longer a consumer spends at a shopping centre, the more money they tend to spend. Thus, he explains that increasing dwell time at a centre is more valuable and important for the centre as opposed to merely increasing foot traffic, which does not always lead to an increase in expenditure but does increase centre maintenance costs.

Considering the above, a list of things which centre management and owners can do to improve the food court experience for their customers is provided:

- a. Centre management and landlords should ensure that there is a wide variety available in the **tenant mix** at the food court to please a wider target market or group of consumers (Bradley 2006; Kusumowidagdo 2015; ECE ca. 2019).
- b. The food court should incorporate **special dietary options** for consumers who are health-conscious and those who are allergy-sensitive (and require those foods that are gluten- or dairy-free, for example) (Blogg 2015; Cushman & Wakefield 2017). Consideration should also be made for those consumers that require halaal, kosher or strictly vegetarian meals.
- c. Consumers are increasingly conscious of receiving **good quality food** (ECE ca. 2019), and the food court should ensure quality standards are maintained in order to retain their customer base.
- d. Management should ensure that there is always **sufficient seating** for consumers (ECE ca. 2019) to relax and enjoy their meals. Crowded food courts become uncomfortable for consumers (Kusumowidagdo 2015). Careful attention should also be paid to the **ergonomics** of the seating and area (Kumar 2018), so as to allow consumers to derive maximum benefit from their relaxation time at the food court.

- e. **Cleanliness** is an extremely important factor to consider, especially where food is concerned and in areas where food is consumed (JLL 2017; ECE ca. 2019). Consumers do not want to take their meals in an unclean environment, and most definitely will not spend much time in an environment which is unsanitary.
- f. It is also observed that **handwash stations** made available at a food court are extremely beneficial for consumers (Kusumowidagdo 2015). They allow consumers to conveniently wash their hands before and after meals without being displaced from the food court itself.
- g. Consumers appreciate having access to clean **lavatories** and **nappy changing stations** in the vicinity of the food court. These make it convenient for consumers to have access to these facilities without leaving the food court area and their families or groups and makes it far easier for mothers to tend to their babies.
- h. Since people constantly need a connection to the internet for work and social media, access to **laptop charging stations** and **Wi-Fi** in the food court are a great attraction (Cushman & Wakefield 2017).
- i. There should be sources of **entertainment** in or around the food court area for consumer leisure while they relax and have their meals. There should be provision made for adult entertainment in the form of televisions, for example. Entertainment for kids may include televisions and play areas.
- j. Consumers value **good service** (JLL 2017) and will often return to an outlet on the basis of the quality of service received. Poor service results in a loss of customers. Adequate staff, and staff that are polite and friendly are important for retail success.
- k. **Security** measures, as well as visible security presence are important to customers visiting the mall or centre (Bradley 2006). They want to be able to relax with peace of mind, knowing that they and their families are well-protected in the food court.
- l. A **short turnaround time** is extremely important for the success of food courts (ECE ca. 2019). Hungry customers do not want to be kept waiting long for their meals, especially when they have shopping to do thereafter or curfews.
- m. Many consumers appreciate great **interior design and architecture** efforts at the food court (Kusumowidagdo 2015; ECE ca. 2019). If the space is attractive, they are more likely to increase their dwell time at the food court (ECE ca. 2019).
- n. The food court should have **ease of accessibility** and a **good location** in the mall or centre (ECE ca. 2019). Usually the food court is situated at the centre of the mall or shopping centre and should have its own entrances and exits. Operators are also seeking more interesting spaces to differentiate themselves from their competition (Cushman & Wakefield 2017).
- o. Consumers want to be afforded **cashless payment** options (ECE ca. 2019) as many do not carry cash around for fear of loss or theft.
- p. There should be **accommodation for the elderly and physically challenged** taken into account at the food court. This can be achieved in the form of handrails, lifts and ramps, for example.
- q. A good food court should include **non-smoking areas**, as well as **designated smoking areas** to accommodate those consumers who enjoy smoking.

- r. Malls and shopping centres often draw crowds with a vast array of budgets. Thus, the food court should **cater for customers with varying budgets** to increase its foot traffic and target market.
- s. Due to the new 'food culture' which is spreading rapidly, consumers constantly want **authentic and unique cuisine** options (JLL 2017; Cushman & Wakefield 2017). They want to try F&B options that are 'different' and increasingly want to explore new types of cuisine. Thus, shopping centre developers are currently experimenting with cuisines, according to Kumar (2018).

## QUESTION EIGHT

### Do you have any other comments on this subject?

Food courts are competing with restaurants in the centre and online food delivery to your doorstep. Therefore, it increases the pressure on shopping centres to compete for customers and create memorable retail experiences.

Security is a big issue in food courts because of petty thieving. This encourages some patrons to support restaurants.

*"Consumers now have many choices available, such as Uber Eats where they can order food online. The aim is to dissuade this. The holistic experience (shopping and eating out) and the dining experience itself need to be enjoyable."*

*"The thriving Food Court should have a good balance between "expected" and "inventive."*

*"There needs to be a quick turnaround and shorter queues at food courts to achieve this."*

*It is important for mall managers to ensure they retain the customer base. These factors are all critical in increasing consumer spending."*

*"In general, a mall should ensure cleanliness at the food court at all times."*

*"Security is also an important element. Shoppers are now more wary and safety is becoming a more important factor. Consumers at the food court will be more at ease with visible security in the form of security guards. Those consumers with young children will also appreciate heightened security measures as they will feel safer. It is very important to these consumers."*

*"As mentioned above, the Food court is the heart of any shopping centre. If this element is weak the knock-off effect is felt by all tenants in the mall."*



*“The mall needs to develop something more conducive to the needs of the consumers that frequent the mall, as the seating area in the food court isn’t utilised much. Perhaps the development of the seating areas at certain stores will be more conducive (as it is safer, with fewer theft threats). Consumers tend to use in-house seating at restaurants and do not generally favour the common food court seating area.*

*The tenant mix at the mall is not great. Food outlets are scattered inside the mall and need to be more localised.”*

## **4.2 FOOD COURTS IN SOUTH AFRICAN MALLS**

Food court spaces that were once occupied by a few famous fast-food outlets and a common seating area have now been transformed into interesting spaces to include a variety of options.

More effort has been directed at developing food courts and enhancing them regularly to maintain customer interest in these spaces. This means that South African food courts have undergone a transformation from basic and functional to innovative, attractive spaces with variety and comfort, offering memorable experiences to their patrons.

Over the past decade, food court areas have been developed to include entertainment areas. At most of the major malls in South Africa, The Fun Company operates game arcades for children, families and even offers adult-suited activities like tenpin bowling.

Food courts in South Africa typically follow a layout whereby eateries, stalls and restaurants are located on the periphery, while a large common seating area with uniform tables and chairs is located centrally.

Some examples are Canal Walk in the Western Cape, Pavilion in KwaZulu Natal and Eastgate Mall in Gauteng. It is common for restaurants and eateries at food courts to provide private seating areas for their customers, irrespective of the main seating area found at the centre of the court. This arrangement allows retailers to continue their aesthetic themes and create an exclusive experience.

Some malls, however, have not yet succumbed to the food court trend such as Galleria Mall in KwaZulu Natal and East Rand Mall in Gauteng. Judging from these malls’ floor plans, space seems to be a limiting factor. It will not be long before these malls will be required to redesign their “food court” areas which are currently just a group of restaurants and confectioners.

Food courts cater for a variety of budgets. Options for those on a tight budget are usually the major fast food outlets like KFC, Fishaways and Burger King or privately-owned takeaways. Those on an intermediate budget tend to frequent outlets like Nando’s or

Spur. While those looking for a more special meal and experience, visit retailers like Ocean Basket.

Local malls also cater for their target markets. A mall in a more elite area or frequented by more wealthy consumers tends to have a more aesthetically exclusive food court with more speciality food and beverage outlets such as The Zone in Rosebank, Gauteng.

It features fixed granite tables and benches at the centre of the food court. It also features exclusive confectioners such as Maverick & Jane (famous for their speciality popcorn in an array of flavours) and Häagen Daz (gourmet ice cream and coffee shop). Contrastingly, malls which cater to a varied consumer base in terms of spending potential such as Pavilion tend to have a comfortable and simple seating area.

#### **4.3 CHALLENGES & OPPORTUNITIES FACING LOCAL FOOD COURTS**

Food retailers are under increasing pressure to grow and diversify according to consumer demands. However, there are many aspects which influence the success or downfall of these food outlets.

Some of the challenges experienced by local food courts are as follows:

**Earning and spending potential of consumers:** Most South Africans find themselves with either a tight or no budget for eating out. A large percentage of the population does not earn sufficient money to frequent malls and eat out often, and when they do, it is usually fast-food outlets at the food courts that receive their business.

**Low growth economy and unemployment:** South Africa is currently a low growth economy. Many large companies are down-sizing and employees are being retrenched. Unemployment rates are escalating, exacerbating the unemployment situation.

**Cost of food and beverages:** The cost to process goods is expensive for manufacturers. They cover costs by selling at higher prices. Wholesalers, in turn, charge retailers higher prices. As a result, price increases are passed on to consumers.

**Customer service:** Some food retailers tend to give poor service. Bad experiences mean that consumers are unlikely to return to a food outlet.

**Public transport:** Many South Africans have neither a personal vehicle nor access to public transport to visit malls. Public transport is unsafe.

**Crime and safety:** Crime is a major problem. Vagrants and criminals are increasingly finding their way into malls, heading straight for food courts to beg for leftovers and ruining the experience for consumers. Malls were once regarded as “safe” environments. However, this has changed.

Crimes are committed in mall parking areas and inside malls. At some malls, food courts tend to be situated near parking areas. These parking areas have become crime hotspots for hijackings and hold-ups. Criminals often make their way into food courts to steal while consumers are preoccupied.

**Cleanliness:** Consumers place great emphasis on hygiene to avoid food contamination. Many consumers will not revisit a food retailer if unhygienic conditions are experienced.

**Maintenance issues:** Many retailers do not adequately maintain their premises.

Some opportunities include:

- Proper selection of staff, including managers, with a customer focus.
- More attention should be directed toward ergonomics of the business.
- The aesthetic design of the outlet should also be given more priority.
- Retailers should become more innovative in creating more unique and authentic experiences for consumers.
- Providing free Wi-Fi.
- Introducing more international brands into food courts.
- Improvement of customer services.
- Maintaining clean and hygienic premises.

#### **4.4 EXAMPLES OF GOOD PRACTICE**

There are different cultures and practices which influence the way people think and behave. By the same token, there are also mutually adopted perceptions and practices across the globe.

**Eat and Eat (Indonesia):** Ciputra World food court in Surabaya was surveyed to determine the factors which attract visitors.

One of the major findings is that a comfortable space that contributes to a “sense of place” was perceived by consumers to consist of some of the following elements: themed and decorated corridors; furniture; food stall decoration; dining room zoning; wall and floor finishing; visitors to the food court; food vendor variety; consumer lifestyles; and accents (Kusumowidagdo 2015, p 13).

Another important concept came to light during the study, on the author’s interviewing of a 30-year-old female. Hand washing stations are vital in food courts, for consumers to be able to comfortably and conveniently wash their hands before and after taking their meals. The participant described appropriate and clean hand washing facilities as being of great importance to her and expressed that the Eat and Eat hand washing facilities were adequate.

Kusumowidagdo (2015) also found that consumers were perceptive to the décor at the food stalls and lighting. She describes the décor at the serving areas as being informative about vendors' products and states that lighting should support the food court theme. The author interviewed two participants, a male aged 32 and a female, aged 30. They described the food stalls as being "orderly and well-designed", and as having "unique accessories, such as chandeliers".

**The Zone@Rosebank (South Africa):** In a case study by Cushman and Wakefield (2017), The Zone was found to have distinguished itself as a "fashionable favourite" and "lifestyle destination mall" – not just a mall at which to shop and eat.

The authors state that The Zone has more than 40 food outlets and caters for lunch time and dinner trades. Situated nearby is the cinema level and entertainment area in the form of a games room. The Zone has also become one of the most easily accessible malls for those without a vehicle. The mall's food court was also found to cater for F&B varying from fast food and takeaways, to bistro dining, and gourmet snacks and desserts.

**The Dubai Mall (United Arab Emirates):** A case study by Cushman & Wakefield (2017) states that one of the biggest shopping and entertainment malls in the United Arab Emirates (UAE) is the Dubai Mall which is 1.1 million m<sup>2</sup> in size.

The study states that there is a great variety of food retailers within the mall, collectively featuring 120 food outlets. There are 40 food outlets alone in its food court, as well as cafés and restaurants throughout the mall. Their food court includes outlets such as Chowking, Fatburger and Five Guys.

**The Chelsea Market (USA):** The market is situated near the New York "High Line" comprising over 35 food stalls offering a wide range of produce including, soup, wine, cheese, nuts and cheesecake. It is also said to be home to over a dozen restaurants, which occupy a third of the market's floor space (inclusive of event spaces).

Although food is the main focus of the market, there is great success in their mix of food and non-food retailers, providing a benchmark and reference for future urban retail projects (Cushman & Wakefield 2017).

**Mercado Roma (Mexico):** This centre, which houses food, entertainment and leisure facilities, is commonly seen as the "pioneer of food halls in Mexico City" (Cushman & Wakefield 2017). It is situated in Roma in Mexico City, and said to be known for its wide variety of bars and restaurants and is also situated in a "walking-friendly area".

This centre takes the form of a food hall more than a food court, with its food outlets split amongst its two floors and roof garden. Organic food is available on the ground floor, with two restaurants on the second floor, and a cocktail and beer outlet situated at the roof top.

**UP Square Shopping Mall (South Korea):** This mall is situated in the Ulsan, the South Korean port city. This mall is said to boast a floor space of 63 000m<sup>2</sup> over 16 floors. It is stated that the mall is designed as a “lifestyle mall” containing homeware, fashion, leisure and entertainment outlets. It was found that UP Square was able to generate turnover rents by including a dedicated F&B zone or court on its 5<sup>th</sup> floor (Cushman & Wakefield 2017).

**Food Republic, Capitol Piazza (Singapore):** The shopping centre is said to be 1 100 m<sup>2</sup>, and home to eleven F&B vendors, nine of which are from the Asia-Pacific region, including Indian, Indonesian and Hong Kong cuisines (Cushman & Wakefield 2017).

**Eataly Food Halls (USA):** Eataly was described as a food hall with an Italian marketplace design with 34 outlets internationally, five of them in the USA. Although each outlet differs a little from the others, Eataly is said to feature an open-market style layout with various counters offering Italian desserts like gelato and cannoli to salads and meats (JLL 2017).

**Intu Trafford Centre (United Kingdom):** This centre’s food court is the largest in Europe. It is designed to replicate a 1930s cruise ship and contains street-like spaces whose themes have been inspired by countries around the world JLL (2017).

**The National, Chicago (USA):** This office building, situated in Chicago, previously serving as the Chicago Public Schools headquarters was purchased and renovated in 2015 and now includes the Revival Food Hall. The food hall as an “eclectic and upscale “food collective” able to seat 300 patrons. There are now several new and improved lunch time offerings available in an area which previously lacked a variety of lunch venues. The stalls in the food hall are said to consist of popular local restaurants as well as new-concept outlets such as Antique Taco Chiquito JLL (2017).

#### **4.5 CASE STUDY OF SANDTON CITY FOOD COURT**

**About Sandton City:** Sandton City Shopping Centre is renowned amongst both local and international visitors as one of Africa’s leading retail destinations. With an impressive retail and leisure space covering 147 940m<sup>2</sup>, Sandton City is home to over 300 of the most exciting local and international retailers and presents you with a world of luxury in the exclusive Diamond Walk.

Adjacent to world-class hotels and mega corporate headquarters, the Sandton precinct measures a massive 215 000m<sup>2</sup>. Winning multiple Best Shopping Mall awards each year, Sandton City continues to be a leader in mixed-use properties (Liberty, 2019: p 1).

**Renovations:** The Sandton City Shopping Centre, north of Johannesburg, has just recently renovated its food court. The redevelopment sought to address the challenges of that area of the mall that did not fully supplement the holistic offering of the Centre.

The redevelopment saw the inclusion of a new offering of the mall dedicated to family fun, entertainment and food, at Sandton City's Fun District, which is purposed to transform the asset into an inclusive shopping centre that caters for and meets the needs of the whole family.

This new area includes the addition of the first Hamleys World in South Africa, deemed the country's largest store at approximately 2,000m<sup>2</sup>. Sandton City's Fun District also features a new San Antonio flagship Halaal Spur at 649m<sup>2</sup>, catering to the previously underserved market. The 280-seater offers a state-of-the-art children entertainment area, with a range of other entertainment experiences and activations. The level also includes South Africa's favourite specialist gaming store BT Games, which saw the opening of its latest retail outlet at 102m<sup>2</sup>.

**Food Court:** The food court is designed with sustainability and an eco-fashionable theme in mind. This food court, like other big food courts, have generally been about bright lights and fast food. But things have changed and people want a more "natural" experience and not necessarily the usual mix of fast food brands.

The biggest new upside is a mobile device charging station, which means that patrons do not run out of cell-phone battery. The Centre also has free WiFi.

The brands on offer are most of the old favourites, and some new ones to make it more interesting. These include Ocean Basket, Krunch, ANAT, Fishaways, Popeyes, Adegga Express, Steers, Burgerrack, Cinnabon and Krispy Kreme.

Sandton City's owners, Liberty Two Degrees, Liberty Group Limited and Pareto Limited, have combined their commitment to enhancing the customer experiences and their passion for the environment in this investment project.

Chief Operating Officer of Liberty Two Degrees, Jonathan Sinden spoke about the project and said (IOL, 2018):

*"The investment in the Food Court has been meticulously planned and was ultimately driven by the strategic desire and vision of continuously introducing and reinventing world-class retail standards at Sandton City".*

Sinden added that Liberty Two Degrees, as owners, are dedicated to innovation and to create experiential offerings that will make Sandton City different from other super-regional shopping centres in the country by providing global experiences in South Africa.

The Sandton City food court reveals a sophisticated and sustainable design, setting it apart from industry norms and taking fast-food experiences to new levels of comfort, convenience and interest.

According to Tia Kanakakis, MDS Architecture, the interior design idea was one that would make Sandton City's food court unique to many, and it was inspired by responding to the way food needs and wants has changed over the years.

The artisanal nature of food today has inspired the look and feel of the new food court where the natural elements such as landscaping, green features and sustainable design have been included in the concept.

The design inspiration is aligned with the idea of artisanal food, green design and the contrast of old and new to create a bespoke food district.

Natural materials are being utilised as much as possible with natural landscaping an essential part of the design.



The food court has a focal point that catches the consumers' attention. It is an anchor to the area. It is catchy, but not overdone, unlike some other food courts.





The greenery gives the consumers a garden “feel” and promotes eco-friendly spaces.



WiFi and facility to charge mobile devices is freely available. It encourages patrons to spend long hours in the food court.



The tables give the impression of pavement dining which is not a norm in the country for safety reasons.



The green theme is consistent throughout.



Aesthetic places for long conversations.





A splash of colour at one end of the food court to brighten things up.



The wooden beams gives the food court an artisanal feel.

**Observations:** Observations were conducted of the Sandton City Shopping Centre food court over a weekend.

The following observations come to light about the food court:

- It has been revamped with a new layout, new furniture and walkways. There is a huge pillar with a focal point that serves as an anchor for the food court.
- Access to the food court from certain parking areas is very easy. If patrons want to go directly to the food court, these parking areas are ideal. Within the centre, the signage for the food court is conspicuous.
- The food court consists of two parts for seating. The first is an open area where patrons are visible to each other. There is a huge TV screen featuring sports events. This is suitable for patrons to watch matches collectively. It creates a good atmosphere and vibe.
- The second part is more private with dividers that accommodate about six tables per area. It is more private but not concealed. The furniture and layout ensure small spaces for more intimate conversations.
- Although the food court was very busy over the weekend, there was no shortage of seating space. Prior to the revamp, the food court had limited seating space which turned customers away.
- The food court has major brands such as Adegas Express, Fishaways, Anat, Ocean Basket, Popeyes, Debonairs Pizza, Krispy Kreme and Cinnabon.
- Although the stores have their signs, the lighting in the food court is not overwhelming.
- There are also not too many restaurants in the direct food court area. This does not overwhelm shoppers with choices.
- The pricing of food by the stores are reasonable for middle-and high-income income patrons with more pricey restaurants in other areas of the mall.

**Impressions of Patrons:** Food court patrons were asked to give their “gut” impression of the food court. The patrons’ responses were as follows:

POSITIVES	NEGATIVES
The new food court looks great.	They should have used real plants and not artificial plants.
The seating is very comfortable.	It would have been great if there was a play area to keep the kids busy.
I like the green areas	Sometimes there are suspicious looking people around.
I like the privacy.	The food court is too confined in a small area.
The appearance is aesthetically pleasing.	
It is convenient for a family to buy meals from different takeaways in close proximity.	
I come frequently because there is a variety of food choices for the family.	
There is WiFi and power.	
It is clean. Before we had to look for a cleaner to clean tables.	
This is a super mall.	
We see lots of famous people here.	
It’s good that the TV is on silent.	
It’s a fab place to chill out with friends.	
Sandton is the place...	

#### 4.6 SUMMARY OF FINDINGS

Based on the literature review, observation and interviews, there is no such thing as a single success factor. When designing and planning a food court, many aspects have to be considered and brought into a coherent overall concept which is tailored to each centre.

##### Catchment Area

The higher the percentage of visitors with more than 15 minutes of travel time, the better: the centre will then increasingly be used as a culinary meeting place. A large number of offices or workplaces in the surrounding area is also beneficial.

### **Location**

The food courts in shopping centres should be quickly accessible and easy to find. In addition, they should provide visitors with pleasant views. Access to parking should be easy. Access to safe public transport is necessary.

### **Safety and Security**

There should be good security in the shopping mall and food court. Motor vehicles should be secured. There should be visibility of security personnel.

### **Camera Surveillance**

Camera surveillance is necessary to ensure that criminal activity and conflict between patrons are avoided. Camera surveillance is also a powerful instrument for data collection in the food court.

### **Tenant Mix**

The decisive factor is diversity: the more choice in a food court, the better for all retailers. The competitive situation is also crucial. Famous food franchises complement each other.

### **Quality**

For every eating concept, the offer has to be right. Quality has always been one of the most important success factors. Customers also increasingly emphasise sustainability when eating out.

### **Atmosphere**

Interior, noise level, music concept: everything has to be sensitively coordinated to offer the guest the highest possible quality of stay. If you feel comfortable, you want to stick around – and consume accordingly.

### **Design**

The architectural design and ergonomics add to enriching the retail experience. People remember when they meet friends and relatives at malls.

### **Connectivity**

Connectivity is a big drawcard especially for the youth. WiFi encourages people to spend hours at the centre.

### **Entertainment**

A shopping centre that offers entertainment is likely to attract more footfall traffic into the food court.

### **Market Research**

Centres that invest in market research are likely to acquire a better understanding of shoppers' needs.

### **Other**

Other success factors are fair value for money; short waiting time; high seating capacity; friendliness and cleanliness; cashless payment and a play area for kids nearby.

## **4.7 CONCLUSION**

The findings from interviews with experts in the field reveal that much can be done by retailers of all sizes to improve the overall retail experience with the application of simple ethnographic research.

There is an agreement that the food courts in shopping centres are an important element in the overall customer retail experience. Conveniences such as charging stations, lockers, large interactive screens for sports and kids play areas are becoming a necessity. In centres attracting middle to high income, there is also a move towards healthy eating options and green spaces.

Shopping centres utilise a variety of methods to evaluate the performance of tenants and the success of the food courts which includes turnover of tenants; trading density (square metre x turnover); monitoring through social media; and mystery shopper feedback.

The most common approach to determine tenant mix is to monitor the type of tenants that trade well through market research. This gives the centre an indication of shopper preferences.

Food courts are competing with restaurants in the centre and online food delivery to your doorstep. Therefore, it increases the pressure on shopping centres to compete for customers and create memorable retail experiences.



## **CHAPTER FIVE: RECOMMENDATIONS**

### **5.1 INTRODUCTION**

The recommendations in this chapter is two-fold. Firstly, there are general recommendations to capacitate retailers to employ ethnography in their operations to increase their turnover and customer base. And secondly, to present a toolkit that can be used by businesses for practising retail ethnography – collecting, analysing and interpreting data for retail insights.

### **5.2 GENERAL RECOMMENDATIONS**

The following general recommendations are offered:

- Develop a training programme on retail ethnography that relates to various retail types.
- The training programme should consist of the following package: training guides, training resources and a facilitator guide.
- The training programme should be offered country wide.
- After a six months period, a post-training impact assessment of the benefits of the training programme for participants should be conducted.

Hence, the project should consist of training different types of retailers in the application of market research techniques. The application of these techniques in a work setting over a six months period. Some coaching by experts during the application period. A post training workshop to discuss results and measure impact.

### 5.3 TOOLKIT FOR PRACTISING RETAIL ETHOGRAPHY

Companies can employ the following TOOLKIT:

METHODS	MEANING	INSIGHTS
<b>Shadowing</b>	This involves accompanying the customer on the retail journey unobtrusively and observing their experiences. In the case of a small corner shop it could mean observing the customer from behind the counter.	<ul style="list-style-type: none"> <li>▪ Gain insights about their product choices, movements and behaviours.</li> <li>▪ This can be complemented at the end of the sale by asking a few brief questions about the retail experience</li> </ul>
<b>Videos</b>	This involves videoing activities in the store for a defined period.	<ul style="list-style-type: none"> <li>▪ Capture the behaviour, feelings, emotions, thoughts and choices of the customer with interference.</li> <li>▪ Assist with redesigning the layout of the store to increase sales.</li> </ul>
<b>Consulting floor staff</b>	Floor staff such as packers and merchandisers usually have sound insights about customer behaviours.	<ul style="list-style-type: none"> <li>▪ This method is useful for triangulation of observations with other methods employed.</li> <li>▪ If staff are given some training in customer awareness behaviours, it will provide retail insights.</li> </ul>
<b>Play shopping</b>	The researcher/manager play shop with customers and engages them in conversation about the products, staff support, pricing	<ul style="list-style-type: none"> <li>▪ It is an effective way to get under the skin, but the researcher/manager must be wary of overstepping ethical boundaries.</li> </ul>
<b>Casual conversations</b>	The manager/owner can have casual conversations with their customers. They can discuss retail issues in a non-formal manner.	<ul style="list-style-type: none"> <li>▪ This is very cost-effective and efficient in small stores, including spaza shops and “shebeens” to gather information about the store, products, service, and so on.</li> </ul>
<b>Workshop</b>	Key customers can be incentivised to attend a workshop or social gathering to discuss retail issues. It can also be an open day for customers.	<ul style="list-style-type: none"> <li>▪ It can be very useful if the store is able to motivate customers to attend.</li> <li>▪ Managers/staff can get to know the customers better.</li> </ul>
<b>Intercepts</b>	Researchers observe and ask customers questions at or after the point of purchase.	<ul style="list-style-type: none"> <li>▪ It enables the researcher to understand the motivations that trigger purchasing decisions and their overall shopping experience.</li> </ul>

The following key questions should be addressed when conducting retail ethnography:

PRIMARY QUESTION	SECONDARY QUESTIONS
<p><b>WHAT is the goal of the ethnography study?</b></p> <ul style="list-style-type: none"> <li>▪ <i>What is the purpose, pain point, new direction or need-to-know insight?</i></li> <li>▪ <i>What do you hope to discover through an ethnography study?</i></li> </ul>	<p>Conducting a shopping ethnography study is a way to build customer engagement, delight, and ultimately, loyalty.</p>
<p><b>WHICH method best accomplishes the goal?</b></p> <ul style="list-style-type: none"> <li>▪ <i>What is the scope of the problem?</i></li> <li>▪ <i>What are the cost and cost constraints?</i></li> <li>▪ <i>Should you use one or more methods? Why?</i></li> </ul>	<p>Create a list of objectives to help define the scope of the research. These objectives further refine the study’s goal and could reveal that a different approach such as an “invisible” in-store observations study would be the best initial approach.</p>
<p><b>WHERE will the study occur?</b></p> <ul style="list-style-type: none"> <li>▪ <i>How do you pick the study site?</i></li> </ul>	<p>Consider the following: type of store: mall, stand-alone, department, outlet; “age” of store: established, new or concept; volume of sales and traffic; satisfaction scores and feedback; geographic location; and price (e.g., scope of study, cost of travel for research team, etc.)</p>
<p><b>WHO do the researchers need to speak with to arrange store visits and recruit participants (if needed)?</b></p> <ul style="list-style-type: none"> <li>▪ <i>How big is the research team?</i></li> <li>▪ <i>Who will be on the team?</i></li> <li>▪ <i>Have the researchers been oriented about the exercise?</i></li> </ul>	<p>Store visit details include contacting store managers to obtain approval, coordinating dates (e.g., weekend or weekday) and times (e.g., morning, afternoon and/or evening). The scope of the study determines the number of people on the research team. For invisible, in-store observations, recruiting participants is not necessary.</p>
<p><b>HOW many hours of observation can we afford?</b></p> <ul style="list-style-type: none"> <li>▪ <i>Will the hours be sufficient?</i></li> </ul>	<p>Retail ethnography studies are very scalable in terms of time, team resources and budget limits. This type of research is about adaptability and efficiency—helping to discover a swift and clever way to meet your goals and objectives. This approach does not mean bigger budgets and bigger projects.</p>

Sample list of what researchers record during an in-store observation study.

INITIAL	NAVIGATION	INTERACTIONS	SHOPPING PATTERNS	BARRIERS & OBSTACLES	CHECKOUT	POST-PURCHASE
<ul style="list-style-type: none"> <li>▪ What draws customers in?</li> <li>▪ Who are they shopping with?</li> <li>▪ What are they carrying?</li> <li>▪ Why are they shopping?</li> <li>▪ How do they feel?</li> </ul>	<ul style="list-style-type: none"> <li>▪ Initial movement within store</li> <li>▪ What do customers gravitate to?</li> <li>▪ What do customers examine?</li> <li>▪ Identify in-store traffic patterns</li> <li>▪ Time spent in certain areas</li> </ul>	<ul style="list-style-type: none"> <li>▪ Shopping parties</li> <li>▪ Co-shoppers</li> <li>▪ Social interactions</li> <li>▪ Sales associates</li> </ul>	<ul style="list-style-type: none"> <li>▪ How do customers shop?</li> <li>▪ Do customers refer to prices?</li> <li>▪ When/How do customers refer to prices?</li> <li>▪ How do customers find sizes?</li> <li>▪ How do customers select or take back items?</li> <li>▪ Do customers look at mannequins?</li> <li>▪ What role do the mannequins play in the shopping experience?</li> <li>▪ Observe customer eye moments when finding product</li> <li>▪ Do customers read any signage?</li> <li>▪ What do customers read?</li> <li>▪ Describe any impulsive actions</li> </ul>	<ul style="list-style-type: none"> <li>▪ Do customers encounter any barriers or stopping points?</li> <li>▪ Is there a resolution?</li> <li>▪ How is it overcome?</li> <li>▪ Do customers disengage? At what point?</li> </ul>	<ul style="list-style-type: none"> <li>▪ What are the customers purchasing?</li> <li>▪ Were there any add-ons?</li> <li>▪ Were there any removals?</li> <li>▪ Record any notable interactions between the customer and cashier</li> <li>▪ Record any notable events as prices are tallied or displayed</li> </ul>	<ul style="list-style-type: none"> <li>▪ General customer ending attitude</li> <li>▪ How do customers act after shopping?</li> <li>▪ Note if customers touch anything while leaving store</li> <li>▪ Describe any encounters with security issues</li> <li>▪ Where do customers go next?</li> </ul>

## 5.4 DIRECTIONS FOR FUTURE RESEARCH

The following recommendations for future research are offered:

- Conduct separate ethnographic research studies on various SMME types:
  - Hawkers
  - Micro-enterprises
  - Spaza shops
  - Corner shops
  - Medium-sized stores
  
- Develop a training package of retail ethnography consisting of training modules, training resources and templates to conduct research.
  
- Conduct a comparative study of shopper behaviour in shopping centres catering for different LSM groups.
  
- Conduct a study on tenant mix in shopping centres.
  
- Develop case studies of best practice in ethnography in the sector.
  
- Study shopper behaviour in the store.

## 5.5 FINAL REMARKS

Our final remarks to the W&R Sector are the following:

- Retail ethnography is very effectively used by large shopping malls to improve the overall retail experience. There is meticulous market research conducted to ensure that shoppers keep coming back to the mall. Much of the research is conducted by market research companies that come at a very high price. Large shopping malls and their anchor tenants can afford this.
  
- Retail ethnography can also be effectively used by SMMEs to understand their customers, products and price. Given the nature of their operations, easy-to-use informal research methods can be employed to learn ways to improve the customer experience. These research methods can be learned and applied.

- The intervention given to small businesses should not merely involve training and workshops. Part of intervention should involve coaching and monitoring the business owner/manager in a real work setting. It should also involve reflecting on practice and measuring impact.
- A good starting point will be a pilot study of small and medium retailers.

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