

## **Shopping Centre Classification Scheme: A Comparison of International Case Studies**

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**Abstract:** Shopping centre are retail properties with special qualities compared to other property investments. Shopping centre are the most glorious places these days with their attractive shops and a wide variety people where people spend their weekends to relax and shop. The base for the payoff of all commercial real estate investments is its tenants and thus the purchasing power these are able to attract. The retail tenants might differ in size, management, sales, their exposure to consumer trends and in their positions on their market and positions towards their competitors. However, it appears the forces driving retail expansion all over the world have deviated from actual consumer demand. With the changing tastes and preferences of customers, shopping centre extend a global impact across metros, cities and towns. The scope of the retail business in Malaysia is broad and includes hypermarkets, shopping malls, specialty stores, and direct sales. There are numerous shopping malls of different size, categories and concept located in Klang Valley and the number of shopping centre is still increasing. Now, with the emergence of more shopping malls, undoubtedly the competitions between malls have become stiffer. Shopping malls that are unable to stand the test of time will not survive. This is because newer malls have been built with creative designs, styles, ideas and concepts to attract customers. Other great challenges faced by shopping malls are that they have to find and retain their tenants. Customers would expect certain criteria to be met for optimal satisfaction. Therefore, this paper is to explores the literature review made to be applied in classification of shopping centre in Malaysian dimensions in order to determine and develop the classification framework. In addition, this paper seeks the adoption concept of Shopping Centres in Malaysia. The criteria of classification of shopping centre gained through literature reviews can be set as reference as a rating tool for a grading of shopping centre for developer, tenant and customer to make decision and investment purpose in the future.

### **Keywords**

Shopping centre, Classification, Rating Tool, Grading, Criteria

## 1. Introduction

Today's customers generally showed a tendency to shop at shopping centre that offer a wide range of products under one roof and at the same time offer experience and entertainment environment. In a recent CNN Travel poll (2014), Kuala Lumpur was voted the 4<sup>th</sup> best shopping city in the world behind London, Tokyo and New York. The poll judged cities in the following four areas, using a one-to-10 scoring scale for each category which is getting, around, value, variety and experience. This situation showed how the shopping centre is an important sector in Malaysia. The government unveiled an Economic Transformation Program (ETP) defines the high income threshold at a per capita income of about RM48,000 or USD15,000 in 2020 will require an annual based on World's Bank current definition of high income. In line with this, Greater Kuala Lumpur/Klang Valley will be transformed into a world-class city which area to implement high impact project that will affect to economic growth. Growth will be achieved in a sustainable manner, without cost to future generations, through initiatives such as building alternative energy generation capacity and conserving environment to promote eco-tourism. Greater Kuala Lumpur and the Klang Valley are now assigned as the National Growth Conurbation (NGC) to serve as an international trading centre of the country. In fact, the industry is also an aggressive player offers a variety of packages that can attract more tourists, whether domestic or foreign. The drop of in ringgit given positive impact on the tourism sector as foreign tourists will make Malaysia as their preferred choice of factor cost is lower than other countries. With the implementation of the ASEAN Conference 2015 which makes Malaysia as host is to promote local attractions to foreign visitors. Indirectly, this situation contributes to the commercial sector. (MyMetro 2015). In 2010, the tourism industry has generated RM56.5 billion for the country, equivalent to contributing RM1 billion per week, chalking up 24.6 million tourist arrivals. Within the domestic segment, 115.5 million tourist arrivals and RM34.7 billion of tourism receipts were recorded. Malaysia was also chosen by Lonely Planet as part of the list for Best in Travel 2010 and Best Value Destination 2010 and also won second place as Best International Tourism Destination (2009 & 2010) by the Global Traveller Magazine (USA). Kuala Lumpur is now included as one of the 31 suggested tourist's destinations in the world. However, despite the encouraging growth in the retail space, the literature review on shopping complexes is still limited. For example, it can be observed that there was almost no work related to shopping complex in the early 2000s (Ohle, 2009). There is another investment sentiment survey involving developers, REIT managers and commercial lenders in Malaysia by Knight Frank, 2015 which have highlighted annual sale value of the commercial property increasing during year 2014. More than half of the respondents (52%) believed that the commercial property market had performed below expectation in terms of yield, margin and return, while 44% were of the opinion that the commercial property market had performed as expected. Another education research was by Mohd Yusof et.al (2011) from University Kebangsaan Malaysia focusing on location and typology of shopping centers as catalyst for economic growth. Other than that, the academic studies were by (Abdul Ghani A.A etal, 2011) from Mara University of Technology focusing on towards usable Malaysian shopping centre. This shortcoming must be addressed by research in shopping complex which is essential in contributing to the Malaysian investment sector. The purpose of this paper is to explores the literature review to be applied in classification of shopping centres in Malaysia in order to determine the criteria and sub criteria to develop the classification framework.

## 2. Definition of Shopping Centre

Shopping malls are typically known to be indoor shopping centers, though some have outdoor areas with the shops having their own indoor space. (Abdy, 2010). Shopping mall is also described as an urban shopping area limited to pedestrians, with stores and businesses facing a system of enclosed walkways exclusively constructed for pedestrians (American Heritage Dictionary, 2011). In general, respondents have their own definition of the shopping centre. Each shopping centre also has different facilities and division but still the same function. Savills, Association of Shopping Centre and CH William, Talhar & Wong has their own definition for their research on shopping centre. The respondents highlighted several issues regarding the definition. These are listed in Table 1.

Table 1. Definition of Shopping Centre

Issues	NAPIC	Literature ICSC	Respondents (Findings)
Management	Shopping complex are dominant retail	Shopping center is a group of retail and other	Group of retail shop, restaurants and other business with a common interest in soliciting

	establishments that are planned, developed and operated as a number of outlets within a centre specifically for the purpose of trade.	commercial establishments that are planned, developed, owned and managed as a single property	sales. A place selling the things can buy in one roof in selected location for trade purpose. Size category: Category A: 1 mil sq ft NLA + above Category B: 500,00 sq.ft NLA – 999,999 sq.ft Category C: <500,000 sq.ft Mega Mall (Super Regional = 1 mil sq.ft above Regional = 500,000-800,000 sq.ft
Trading activities	Dominant use here is defined as retail use of not less than 75% of the net lettable area.	Food & Groceries, F&B (Food & Beverage and entertainment	Hypermarket (Tesco, Giant, Eon Big, Carefour, Mydin) = Based on activities. 80% area used.
Parking lots	Common car parks or public car parks	Parking lots provided	Parking facilities area.
Safety & Health	Central firefighting services, complimentary secondary uses like insurance service, central security service	-	Enhance security services , escalator, lift, firefighting, alarm security, security camera, smoke sensor, glass break sensor, window/door security.
Anchor tenants	One or more anchor tenants	Tenants are defined based on their size	Divide by two: Department store and hypermarket
Tenants mix	Retail and service tenants mix	Mostly freestanding (unconnected) or sometimes part of a number of scattered tenant mix one-level buildings on the same property to offer maximum visibility to most retail unit	Fashion, F&B, entertainment
Facilities/amenities	Common lifts and escalators, common lighting, signage and landscaping.	Multi-leveled with escalators, stairs and elevators between levels	The facility developed as planned commercial location

## 2.1 Shopping Centre in General

There are a wide variety of shopping malls in this world. Different types of shopping malls have some different characteristics because they are built to meet the tastes and needs of different type of consumers. There are type of classification of shopping centre in over the world. Hines (1983) has classified shopping malls into six categories such as neighborhood center, community center, specialty center, regional center, super regional center, hypermarket , neighborhood center, community center, regional center, super regional center, power center, lifestyle center, retail podium/plaza, hypermarket center, niche/destination retail center and CBD center. Shopping arcades are dominant retail shops along one or both sides for trade. In data capturing and dissemination by NAPIC, dominant use means retail use not less than 75% of the net lettable area. Asia-Pacific shopping Centre Classifications classified shopping centre in three definition category including food & groceries: includes delicatessens, fruits&vegetables butcher,poultry,fresh seafood,bakery/cakes/pastries, other specialty food F&B (Food & Beverage): includes takeaway food, food courts (including common area seating), cafes and full-service restaurants and entertainment: includes cinemas, gaming/gambling venues, family entertainment centres, video game parlours, bars/pubs/taverns, bowling alley, ice-skating, internal theme park and karaoke. Konishi and Sandfort (2003) state that an anchor tenant or anchor store is a store that increases, through its name's reputation, the traffic of shoppers at or near its location. They divide the categories by four which are number of anchors, type of anchor tenant, percentage of anchor tenants and primary catchment area. Its divide by malls and open air centre. However, it varies with the classification of shopping centre by International Council of Shopping Centres ICSC's Pan-Europe. A traditional center is an all-purpose scheme that could be either enclosed or open-air and classified by size. Specialized centers include specific purpose-built retail schemes—or shopping centers—that are typically open-air and could be further classified by size. Traditional (very large, large, medium and small). Specialized (retail park, factory outlet, theme oriented centre). Other than that, ICSC's Canada has its own classification. There are four categories which are traditional, specialty, shopping centre hybrid and retail mixed-use development. Each categories has different types such as traditional Convenience Centre, Neighbourhood Centre, Community Centre,

Regional Mall and Super-Regional Mall. The centre is Specialty Shopping Centres Specialty, Power Centre, Factory Outlet Centre, Lifestyle Centre, Shopping Centre Hybrid and Retail Mixed-Use Development. According to Raine and Horne International Zaki (1995), the types of shopping complexes are nine (9) categories. The categories include Department Store, Supermarket, Superstore, Hypermarket, Retail warehouse, Shopping complex, Specialty centres, Festival centre and Ancillary retailing. However, according to ICSC's US Classification Shopping Centre, there are three categories which are General Purpose Centre, Specialized Purpose Centres and Limited Purpose Property. Each categories has different types as General Purpose Centre (Super Regional Mall, Regional Mall, Community Center ("Large Neighborhood Center, Neighborhood Center and Strip/Convenience. Specialized Purpose Centre (Super Regional Mall, Regional Mall, Community Center ("Large Neighborhood Center, Neighborhood Center and Strip/Convenience). However, Thailand also has own classification and definition about the shopping centre. Thailand has 10 classification of shopping centre such as Neighborhood centre, Community Centre, Regional centre, Super Regional Centre, Lifestyle centre, Power centre, Big box, Retail Plaza, Hypermarket and Niche / destination retail. The classification of shopping centre in Indonesia include Neighborhood centre, Regional centre, Super-regional centre / Megamall, Lifestyle centre, Big box, Retail podium / Plaza, Hypermarket and Niche / destination retail.

## **2.2 Shopping Centre in Malaysia**

Shopping mall and the retail sector in Malaysia have been experiencing a positive and healthy growth. Despite the economic crisis in 1997 and 1998, this sector remains unaffected. The rapid expansion of the Malaysian economy over the last ten years, combined with external economic and social influences have led to a retail boom in the country. As a result, retail space has been increasing by more than 20 per cent annually in recent years (Othman and Lim, 1997). Recent surveys of retail performance in the Klang Valley and Malaysian retail chain stores indicate that overall business has improved since the Asian economic crisis in 1997 to 1998. Surveys of chain stores in November, 1999, showed a general increase in turnover above 10 per cent for most fashion, grocery, and convenience categories in the Klang Valley. In Malaysia, shopping malls have transcended their initial role as an economic activity to become a community center for social and recreational activity. There is an increasing trend of Malaysians shopping for pleasure and spending their leisure time in shopping malls. Research conducted by Frank Small and Associates found that Malaysian adults (above 18 years old) spent 48 per cent of their leisure time in shopping centers. Window-shopping is one of the seven leisure activities most often engaged in by young, urban Malaysian adults, and in particular students. It is a common sight to see students hanging out at shopping malls with friends after their classes. This is encouraged by the rapid development of transportation system that enables students to travel to almost anywhere that they want, particularly in Klang Valley. This age cohort group, consisting of 18 through 44 year olds, the largest in Malaysia, is roughly 49 per cent of the population and an obvious target market for retail marketers. Developers across Malaysia have realized the importance of students as key targets for shopping malls. A resulting contemporary trend is for shopping malls to be built close to institutions of higher learning. For example, "Mines Shopping Mall" is located close to the Universiti Putra Malaysia and Universiti Tenaga Nasional, "Mid Valley Mega Mall" is built close to the University of Malaya, "One Utama Shopping Mall" is constructed in close vicinity to the Damansara Utama College and Bandar Utama College, "Bangsar Shopping Complex" is built close to the HELP Educational Institutes and so on. Clearly, proximity to students has played an important role in the location of shopping malls in Malaysia.

## **3. Methodology**

Table 2 shows the comparison study on criteria and sub criteria of shopping centre between various researchers, institution and countries which are DTZ Debenham Tie Leung (Malaysia), INSPEN, Konishi, ICSC's Pan-Europe, ICSC's Canada, Raine and Horne International Zaki, ICSC's US, Singapore, Thailand, Indonesi, Hines and ISCS's Asia Pacific. The main criteria was compared by size, anchor tenant, types of product, location, leisure/entertainment, configuration/ presentation/design, structural, customer facilities, physical presentation, maintenance, communications, building centre security and infrastructure/facilities.

Table 2: Criteria and sub criteria of shopping centre comparison

CLASSIFICATION OF SHOPPING CENTRE												
SHOPPING CENTRE CRITERIA	DTZ Debenham Tie Leung (Malaysia)	INSPEN	Konishi	ICSC's Pan-Europe	ICSC's Canada	Raine and Horne International Zaki	ICSC's US	Singapore	Thailand	Indonesia	Hines	ISCS's Asia Pacific
<b>Size</b>												
Gross Floor Area (GFA) of shopping centre	/	/	/	/	/	/	/	/	/	/	/	/
<b>Anchor tenant</b>												
More than three anchor tenants	/			/		/		/		/		/
More than two anchor tenants	/	/	/	/			/					
1 or more				/	/			/				
Three or more large-format retailers ("big boxes" or "category-dominant anchors")	/			/		/			/	/		/
Not anchored.			/	/		/				/		
Anchored by hypermarket		/		/							/	
<b>Types of product</b>												
More comprehensive mix of entertainment activities and dining options	/	/	/	/			/	/	/	/	/	
Entertainment anchor (cinema, bowling, games arcade, etc) fashion, homes and books		/	/	/	/			/				
Daily goods,conveniences retail, services, F&B, basic fashion						/	/	/	/			/
Daily needs-soft goods and services conveniences retail		/	/	/	/							
Restaurants, specialty food stores,F&B,book store, specialized store, cinema or department store						/	/	/	/			
Selling surplus stock,			/	/	/	/			/	/	/	

prior-season or slow selling merchandise and especially designed merchandise												
Chemists,household goods, basic apparel, specialty retail – F&B, conveniences, value / local fashion, local merchandise	/	/	/	/			/	/	/	/	/	
Retail is targeted at a certain segment, sports, homes or ICT		/	/	/	/			/	/	/		
Large 'big-box' stores and wholesale clubs						/	/	/	/			
<b>Location</b>												
Trade area	/				/	/	/				/	/
Central Business District (CBD)	/						/	/	/	/	/	/
Nearby residence					/							
Mass transit lines					/			/	/	/		/
Major highway corridors					/			/			/	
<b>Leisure/Entertainment</b>												
Cinema			/		/			/	/	/		/
F&B			/		/	/	/	/	/	/		/
Bowling				/					/			/
Fitness					/				/			
Family entertainment centres									/	/		/
Internal theme park												/
Karaoke												/
Ice Skating												/
<b>Concept</b>												
More variety and assortment	/		/	/	/	/	/					
Built to house between 30 to 50 retail spaces for rent						/		/	/	/	/	/
Area of town near housing estates or office		/		/	/	/	/					
More shops, land area is larger than the neighborhood mall	/		/	/								
Guided by design – use of									/		/	/

open concept, landscape, outdoor retail, especially F&B												
Selling brand name goods at a discount				/		/	/	/				
1 to 2-storey with car parking and common facilities/amenities		/		/	/	/						
Part of a commercial building							/		/	/	/	
Retail is targeted at a certain segment of market or a certain	/		/	/								
Category dominant anchors				/		/	/	/	/	/		
<b>Configuration/ Presentation/Design</b>												
Indoor and outdoor parking lots	/		/	/	/	/	/	/		/	/	
Enclosed with an inward orientation of the stores connected by common areas/malls, flanked on one or both sides by various entrances. requires more land area for the purposes of parking						/		/	/	/	/	/
Straight line strip with adequate off-street parking at the front	/		/	/	/							
Configured in a straight line as a neighborhood centre, or may be laid out in an L, U or Z shape, depending on the site and design						/		/	/	/		
Multi-purpose leisure-time destination, design ambience and amenities such as fountains and street furniture-conducive to casual browsing	/		/	/	/							
Open-air and/or enclosed centre -comprise						/		/	/	/	/	

manufacturers' and retailers' outlet stores													
A freestanding building under one roof		/		/	/	/							
Office or residential towers, or hotel							/		/	/	/	/	/
Wholesale / retail			/		/	/	/	/	/				
Consistently designed, planned and managed scheme- and large-scale specialist retailers	/		/	/	/	/	/	/		/	/		
<b>Structural</b>													
Total floor area	/	/	/	/	/	/	/	/	/	/	/	/	/
Total rental area	/	/	/	/	/	/	/	/	/	/	/	/	/
Number of floor	/		/		/		/	/	/	/	/	/	/
Number of anchor	/	/	/	/	/	/	/	/	/	/	/	/	/
Age of building													
Number of branded retailers		/						/		/			
Tenants mix	/	/											
Office supplies stores					/					/			
Convention centres					/								
<b>Customer facilities</b>													
Parking space		/			/	/	/	/	/	/	/	/	/
Child minding/baby changing room				/	/	/							/
lifts and escalators		/			/			/					
OKU's restroom			/										
Banking				/	/								/
<b>Physical presentation</b>													
Walkway	/					/	/						
Open-sided walkway			/						/				
Enclosed climate controlled passageway.		/			/		/						
Stairs					/		/						
Single or multi storey/floor space	/	/	/	/	/	/	/	/	/	/	/	/	/
Specific demographic segment					/								
<b>Maintenance</b>													
M&E		/						/					
Civil		/											
Landscaping		/			/				/	/			

Cleaning				/				/				
<b>Communications</b>												
Signage		/										
Information directories	/			/		/		/		/		/
Music		/			/		/					
Lobby		/				/						
<b>Building centre security</b>												
Security service		/										
Firefighting services		/				/		/				
Emergency systems				/		/			/			/
Electronic system					/							
<b>Infrastructure/ Facilities</b>												
High quality street furniture								/	/	/		
Ambiance	/				/				/	/		
Finishing								/	/	/		
Window		/			/				/	/		
Interior Design		/			/				/	/		

### 3.1 Categories of Shopping Centre

There are twenty one (21) types of shopping centre in over the world including Super Regional, Regional, Sub Regional, Mega Mall, Big Box, Neighborhood, Shopping Complex/Shopping Centre, Shopping arcade, Hypermarket, Department Store, Single-Category Centre, Major Transport Hub Centre, Specialty Centres, Destination retail center/Retail Podium/Plaza, Niche/ Destination retail center, Community Centre, Factory Outlet Centre, Lifestyle Centre, Power Center, Theme-Oriented Center, Leisure/Entertainment. The analysis (comparison method) shows total up to 4 frequencies was used as the suitable categories of shopping centre in Malaysia. The categories of shopping centre in Malaysia will categories by ten (10) shopping centre which are Super Regional, Regional, Neighborhood, Hypermarket, /Retail Podium/Plaza, Niche/ Destination retail centre, Community Centre, Factory Outlet Centre, Lifestyle Centre and Power Center (in blue colour line).

Table 3. Categories of shopping centre analysis

	ICSC CANADA	ICSC US	Hines	Raine & Horne	DTZ Malaysia	Konishi and Sandfort	ICSC PAN ASIA	INDONESIA	SINGAPORE	THAILAND	ICSC ASIA PACIFIC	INSPEN	Total
Super Regional	✓	✓	✓		✓	✓		✓		✓	✓		8
Regional	✓	✓	✓		✓	✓		✓	✓		✓		8
Sub Regional											✓		1
Mega Mall											✓		1
Big Box								✓	✓	✓			3
Neighborhood	✓	✓	✓		✓	✓		✓	✓	✓	✓		9
Shopping Complex/ Shopping Centre				✓					✓			✓	3
Shopping arcade												✓	1
Hypermarket					✓		✓	✓	✓	✓		✓	6
Department Store				✓							✓		2
Single-Category Centre											✓		1
Major Transport Hub Centre											✓		1
Specialty Centres			✓	✓							✓		3
Destination retail center/ Retail Podium/ Plaza					✓			✓	✓	✓			4
Niche/ Destination Retail					✓			✓	✓	✓			4
Community Centre	✓	✓	✓		✓	✓			✓	✓			7
Factory Outlet Centre	✓				✓		✓				✓		4
Lifestyle Centre	✓	✓		✓	✓			✓	✓	✓			7
Power Center		✓			✓		✓			✓	✓		5
Theme-Oriented Center		✓					✓						2
Leisure/ Entertainment											✓		1

#### 4. Result: Conceptual Framework of Shopping Centre in Malaysia

There are ten (10) categories of shopping centre that was used and suitable in Malaysia. Each shopping centre has a 5 rating from one star until five star. The 5 rating star represent for excellent, 4 rating star represent above average, 3 rating star represent average, 2 rating star represent below average and 1 rating star represent poor. Grading of shopping centre based on criteria and inspection study. The categories of criteria divide by fourteen (14) which are Size, Anchor tenant, Types of product, Location, Leisure/Entertainment, Concept, Configuration/Presentation/Design Structural, Customer facilities, Physical presentation, Maintenance, Building centre security and Infrastructure/Facilities. The criteria of shopping centre was validate from expert opinion in various industry including government and private sector. Analytical Hierarchy Process (AHP) using as a method to rating the grading of shopping centre, AHP also widely uses as an effective tool for the project selection in shopping centre. Analytical Hierarchy Process (AHP) has become a popular tool for making a decision among researchers and has been widely used for solving problems (Vadiya & Kumar, 2003).

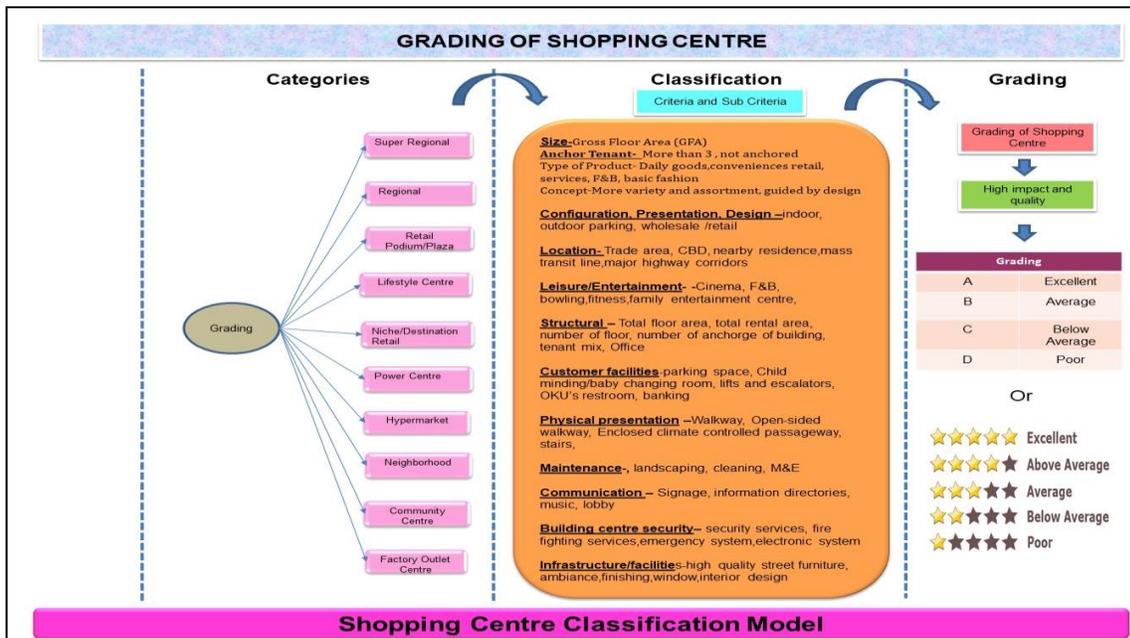


Figure 1: Conceptual Framework Classification of Shopping Centre

#### 5. Conclusion

Finally, based on result from critical literature review analysis, it can be concluded that the result shows there are ten (10) suitable categories of shopping centre can be adapted in local context to develop the classification model shopping centre in Malaysia. Each categories has criteria and sub criteria. There are fourteen (14) criteria for each categories of shopping centre. The purpose to grading of shopping centre to help the owners rank portfolio holdings and shed low-scoring properties. Lenders use it in a similar manner. Retailers often use grading to help them evaluate the setting for which their stores exists. (ICSC, 2009). Gregory Kerfoot (2009) suggested mall-grading criteria using an A-B-C-D grading matrix that captured population in the trade area, the number of anchors, small-tenant occupancy and competition. PriceWaterhouseCoopers (PWC) used expert opinion from retail real-estate-industry professionals to create a grading system for regional malls. Although its survey-based system has been recast in mid-2009, PWC's regional-mall classification remains based on sales-per-sq-ft evaluations, which is its shorthand for easy classification of a host of factors that would impact the sales performance. From the preliminary study, the important criteria including location, size, Catchment area and anchor tenant. Tanan (1998) was stated five important factors as attraction power of shopping center that is location, business concept, design, tenant mix, and management. This shopping centre classification model can be betterment benchmarking for Malaysian property industry in general.

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