# Categorization of Shopping Centres in Malaysia: A Criteria-Based Delphi Study

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Shopping centre in Malaysia plays a vital role in promoting economic growth and urban development. By the end of the year 2019, Malaysia will have close to 700 shopping centres in total net lettable area of 170 million sq ft. Malaysia shopping centre industry offers more than 166.6 million square feet of the net lettable area with an estimated real estate value of RM130 billion. Retails contribution to the GDP could expand by 15 per cent from the current 10 per cent in the next five years and it could get better with tourism growth. For the second quarter of 2018, Malaysia's retail industry reported a growth rate of 2.1 per cent in retail sales, compared to the same period in 2017. However, Malaysia's established centre operators recorded an average occupancy rate of 92% in 2018, according to a survey conducted by the Malaysia Shopping Centres Association (PPK). For 671 of shopping centres surveyed in the second half of the year, the average monthly gross rental rate per square feet of net lettable area was found to be RM7.87, while the average monthly expenses over the same area was RM3.07. One way to fill the centres, both new and existing, is tourism. The centres must be interactive. It must have things like artificial intelligence that interact with people. There should be new dynamics in shopping. Centre owners must keep abreast with the latest trends. Pricing and design must be right. Centres are also adding more food and beverage (F&B) outlets, tenants mix and branded outlets. The developers who are looking to set up centres should consider location and connectivity include concept, target market, mixture of tenants, security, parking, cleanliness and making the centres interactive. Given this context, this paper brings the Malaysian shopping centres into focus by classified based on ten categories including super-regional centre, regional centre, neighbourhood, community centre, lifestyle centre, factory outlet, hypermarket, plaza, niche and power centre. The categories based on size, criteria and function each shopping centre. The criteria of shopping centres were validated by expert panels using Delphi Method. Through the criteria, all the shopping centres were categorised in different groups. The study was the step to categorised shopping centre based on suitable categories and it is expected to provide insights to the stakeholders in improving their investment and business decision of the shopping centre in Malaysia.

## Keywords (12 font)
Shopping centre, categories, classification, size, criteria

## 1. Introduction

Most Malaysian like shopping. Little wonder why Malaysia has 3 of the Top 15 world's largest shopping malls, namely One Utama, Mid Valley Megamall & Gardens Mall, and Sunway Pyramid, all developed and managed by property developers who are long term shareholders of these prized assets. With the continuing population growth and urbanization, an increasing number of new and high-quality malls are being built in this country. Property

developers like a shopping centre's defensive characteristics, especially in times of uncertainty. Retails malls differ in size and focus. The target market, types of tenants and customers may also vary from one mall to another. Ten key factors for a shopping mall including matured and strategic location, good accessibility and infrastructure, the right mall concept, positioning and branding, excellent mall facilities and services, efficient mall design and layout, quality tenant and trade mix, supply matches demand in the vicinity, sufficient car parking supply, effective marketing and publicity and proactive management and maintenance. A matures location provides the population catchment area necessary to support the various businesses of retailers based in the mall. Some of the world's biggest and most prominent shopping malls are located along Lebuhraya Damansara Puchong (LDP), a testament to the fact that matured and strategic location is definitely a key success factor. In contrast, some shopping malls located away from highways may not do as well to attract shoppers though there are many other factors which can affect the success of a mall.

Nowadays, the majority of people will say that they will be heading over to some shopping mall somewhere, spending a few hours there, to shop, eat, watch movies or just to hang out. Knight Frank stated in its Real Estate Highlights report that the first half of 2018 already has a total of 57.5 million sq ft of lettable retail space. It also revealed, "Retail space per capita, analysed at around 7 sq ft per person is one of the highest in Malaysia. The current concern weighs more on the completed retail stock that have yet to be filled and this puts further pressure on occupancy levels going forward." The retail property market is also made up of different types of retail centers, from small neighborhood shopping centers to big outlet shopping centers. Whatever retail center the investor is interested in, the base for the payoff of all commercial real estate investments is its tenants and thus the purchasing power these are able to attract. Thus, investing in retail property requires a wide base of knowledge that involves knowledge in the regional economy and all the locational factors that has effect on the property as well the retail specific characteristics. According to Colavolpe (2010), 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. The construction sector between the major sectors contributing to the Output Gross Countries other than the services, manufacturing, agriculture and manufacturing sectors mining and quarrying. The construction sector involves construction activities residential, construction of commercial buildings, heavy engineering construction and construction industry. The construction activities will involve the use process land that leads to property development in land use involved. Commercial property development is a land use process for purpose of office building, shopping center or shop unit. Property development land of the shop unit is among the options that get the place among developers as a simple step and less risk to profit because the building structure of the simple and typical highway store units compared to other buildings as well competitive selling price. With the rising of these investment issues, the need for a solid and well-informed groundwork prior to investing in retail properties is, according to many of the authors above, vital for a good investment decision.

The investor needs to be able to determine which factors that affect the demand for the retail property and to be able to develop a systematic method for evaluating them. It is very important to investor to make a best decision for changing shopping centre to fight the online shopping. In Australia sales in physical stores grew only 3% while online shopping grew almost 10%. Foot traffic in physical stores has fallen by almost 5% this year alone for 2016. Both retailers and shopping centre operators have to work together to create compelling reasons for customers to leave their homes and go shopping in physical stores. This has already resulted in a lot of experimentation, from VIP shopping nights to pop-up stores and events. As the likes of Amazon enter Australia, shopping centres and retailers are going to need to be extra creative. The decline in foot traffic is reflected in the retail industry's profit margins, which have consistently declined since 2008-09. Physical stores have seen their profit margins hover around 5% since 2008-09, while online retailers' have grown. Profit margins for online retailers are now roughly double that of bricks-and-mortar stores. All of this is causing tensions between retailers and shopping centres as customers increasingly shop online.

In Malaysia, the number of shopping centres are on the increase and connectivity to reach them has also improved via road and rail transportation. This, at the same time, has increased the competition among the malls. Malaysia Shopping Malls Association president Tan Sri Eddy Chen proposed that those planning to build a new mall should conduct a more robust market research. Chen added that the Local plan and master plan must be gazette. The Valuation and Property Services Department (JPPH) report shows dumping of shop-type products in all states in Malaysia. Data from JPPH for Q1 2018 shown the total vacancy of shopping centre in Malaysia is 641 buildings. The vacancy rates of shopping centre in Malaysia becomes higher because of effect online shopping. Selangor state the higher vacancy rates with 15.9% compared to Wilayah Persekutuan Kuala Lumpur (13.9%) and

Johor(13%). The total vacancy space in Malaysia shopping mall is 3110.40 (000 sqft) with 19.8%. Figure 1 shows the Schedule of Q1 2018 trading retail vacancy rates showing the rates of Selangor, WP Kuala Lumpur and Johor record the largest percentage of vacancy spaces.
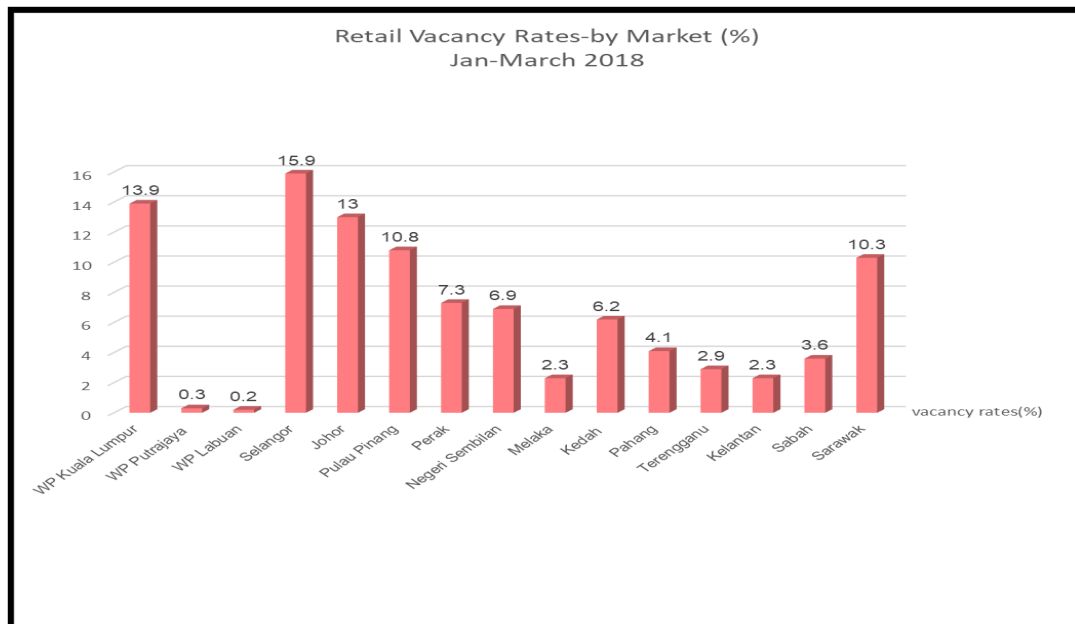


Figure 1: Retail Vacancy Rates-by Market. (Source: JPPH, 2018)

However, the number of shopping center vacancies in Malaysia recorded high numbers, but the number of shopping centers growing steadily springing up like mushrooms after the rain. One of the reasons is value of transaction by the price range showed commercial lands ranked secondly after the residential lands. The figure 2 shows the data. Thus, the malls in Malaysia needs improvement through the grading of shopping centre. The purpose of this paper is to come out categorization of shopping centre in Malaysia with criteria based on Delphi Study.
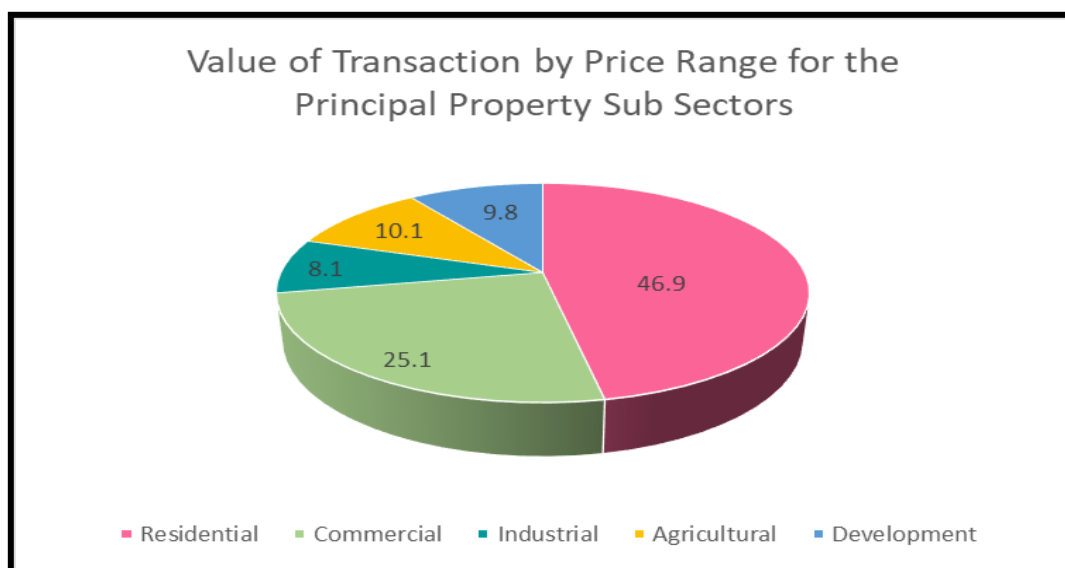


Figure 2: Value of Transaction by Price Range for the Principal Property Sub Sectors (Source: JPPH, 2018)

## 2 Criteria of Shopping Centre in General

There are type of classification of shopping centre in over the world. According to the benchmarking result of comparison between shopping mall in various country and researchers, there are fourteen (15) criteria for each categories of shopping centre. It could be concluded that the suitable criteria and sub criteria applied in Malaysian shopping centre including size, anchor tenants, types of product, location, concept, configuration/presentation/design, leisure/entertainment, structural, customer facilities, physical presentation, maintenance, communications, building centre security, infrastructure/facilities and prayer room. Asia-Pacific shopping Centre Classifications classified shoppig 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.

### 2.1 Criteria and Sub Criteria of Shopping Centre in Malaysia

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. The criteria and sub criteria of shopping centre that was suit with Malaysian environment has shown in Table 1.

Table 1: Citeria and sub criteria of shopping centre in Malaysia

| No | Criteria | Details/Sub Criteria |
|---|---|---|
| 1 | Size | 800,000+ sq.ft |
| 2 | Anchor tenants | More than 3 anchor tenants |
| 3 | Types of product | More comprehensive mix of entertainment activities and dining options |
| 4 | Location | Situated on mass transit lines (e.g. subway, LRT, bus) and city centre |
| 5 | Concept | Similar in concept to regional malls, but offering more variety and assortment. |
| 6 | Configuration/ Presentation/ Design | Indoor and outdoor parking lots |
| 7 | Leisure/Entertainment | Cinema, F&B, bowling, fitness, family entertainment centre, internal themepark, karaoke, ice-skating |
| 8 | Structural | Total floor area, total rental area, number of floor, number of anchor, age of building, numbers of branded retailers, tenant mix, office supplies stores, convention centre |
| 9 | Customer facilities | Child minding/baby changing room, lifts and escalator, OKU's restroom. |
| 10 | Physical presentation | Walkway, open sided walkway, enclosed climate controlled passageway, stairs,single/multi storey/floor space, specific demographic segment. |
| 11 | Maintenance | Landscaping,cleaning,civil,M&E |
| 12 | Communications | Signage,information directories, music, lobby |
| 13 | Building centre security | Security services, fire fighting services, emergency system, electronic system. |
| 14 | Infrastructure/facilities | High quality street furniture, ambiance, finishing, window, interior |

| 15 | Prayer room (Surau) | Space prayer room is a quiet location set aside in a busy public place in contemplation or prayer. |
|----|---------------------|----------------------------------------------------------------------------------------------------|
| 16 | Sustainability | Green building, water efficient, building energy. |
| 17 | Banking facilities | Banking, ATM services and money changer |
| 18 | Marketing | Promotion based on event, DJ's services, pop-up bars and free transport |

## 2.2  Categorization of Shopping Centre by NAPIC

According to NAPIC (2017),    shopping complexes includes multi-unit retail establishments under a covered walkway that encourages pedestrian flow to sustain business activity. Shopping complexes disseminated by NAPIC includes Shopping centres, Shopping arcades and Hypermarkets (stand-alone). Shopping centres are purpose-built dominant retail establishments planned, developed and operated as a number of outlets within a centre for trade. In data capturing and dissemination by NAPIC, dominant use means retail use not less than 75% of the net lettable area. Shopping centres have:

- Outlets within an enclosed climate-controlled and spacious walkway
- Retail and service tenants selected for merchandise balance
- One or more anchor tenants
- A single management company
- Common car parks
- Central air-conditioning
- Central security service
- Central fire fighting services
-  Common lifts and escalators
- Common lighting, signage and landscaping
- Unified management policies
-  Complimentary secondary uses like banking and other services, which are less than 25% of the net floor area.

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. Shopping arcades have:

- Generally open-sided walkway and few have an enclosed climate-controlled passageway.
- Retail and service tenants mix generally unplanned and retail goods are generally similar in kind
- No anchor tenants within the arcade
- A single management company
- Common car parks or public car parks
- Generally no air-conditioning, some unit air-conditioning and few with central air conditioning
- Central security service generally unavailable
- Central fire fighting services
- Mostly stairways but some have common lifts and escalators
- General minimum common lighting, signage and landscaping
- Minimum unified management policies
- Complimentary secondary uses like insurance services, which are less than 25% of the net floor area.

Included within the inventory are space with the original use as retail but has changed use on a temporary basis and retail space in an integrated development (where various category of use complement each other).
Hypermarkets are retail establishments that benefit from the economies of scale due to its large minimum
size and offers competitive pricing and a wide range of goods. Hypermarkets in NAPIC publication include:

- Retail establishments with a minimum paid-up capital requirement of RM50 million and minimum size of 5,000 s.m.
- Operated by a single owner/corporation with common facilities/amenities. A freestanding building under one roof.

### 3.0      Methodology : Benchmarking of Categories of Shopping Centre in Malaysia

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 2. 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 |

### 3.1 Categorization Through Delphi Method

After the benchmarking technique, the Delphi Method was used to come out with the main criteria and sub criteria of shopping centre. The Delphi method is a structured communication and consensus building approach amongst a group of experts on a complex problem (Chan et al. 2001). This method refers to an iterative process where consensus is often reached through rounds of feedbacks of experts' opinion and judgment on a particular subject (Hallowell, Gambatese 2010b). The questionnaires are designed to focus on problems, opportunities, solutions, or forecasts. Each subsequent questionnaire is developed based on the results of the previous questionnaire. The process stops when the research question is answered: for example, when consensus is reached, theoretical saturation is achieved, or when sufficient information has been exchanged. The Delphi method can be used when there is incomplete knowledge about a problem or phenomena (Adler & Ziglio, 1996; Delbeq et al., 1975). The method can be applied to problems that do not lend themselves to precise analytical techniques but rather could benefit from the subjective judgments of individuals on a collective basis (Adler & Ziglio, 1996) and to focus their collective human intelligence on the problem at hand (Linstone & Turloff, 1975). The criteria of performance management were validated by 10 experts in the property field. They are senior management personnel / officers from the government agencies and practitioners. All selected respondents have working experience of more than 10 years onwards. This method includes three rounds of allocation of the questionnaire to the expert panel in the field of developer, architect, property valuation, property management estate agency and association as figure 3.
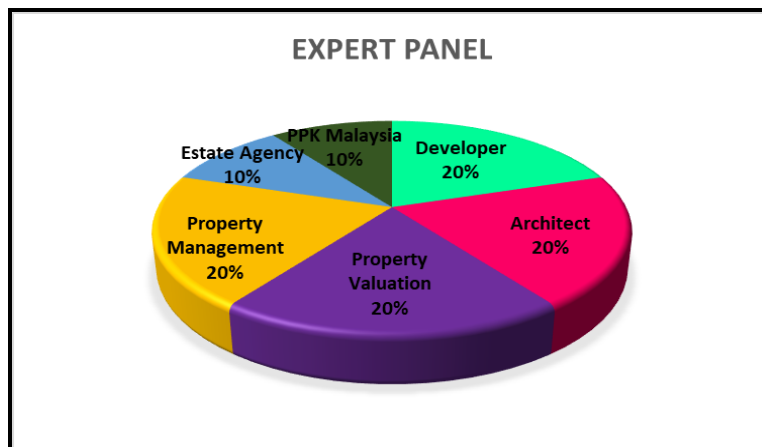


Figure 3: Numbers of expert selected.

Based on result from Delphi process start from 1st round until 3rd round analysis, it can be concluded that the result shows there are eighteen (18) suitable categories of shopping centre can be adapted in local context to develop the classification model shopping centre in Malaysia. The main criteria including size, anchor tenant, types of product, location, concept, leisure/entertainment, structural, communications, infrastructure/facilities, banking facilities and marketing. the rest criteria based on requirement from local authority and planning guideline is configuration/presentation/design, customer facilities, physical presentation, maintenance, building centre security and prayer room (surau). Otherwise, the total criteria are eighteen (18) criteria for each categories of shopping centre as shown in Table 1 before. The categorization of shopping centre was classified based on the criteria through Delphi Method technique.

### 4.0 Results and Discussion

The research scope of the study is Klang Valley area which are including shopping centre in Wilayah Persekutuan Kuala Lumpur (WPKL), Putrajaya and Selangor. Total of shopping centre in Klang Valley is 261. However, the analyze of shopping centre categorization done for the top 5 shopping centre in Malaysia based on size and criteria of shopping centre that was analyze through the Delphi Method. The tables below describe the categorized of shopping centre.

**1. Super Regional (74,322.432m$^2$ above)**

| No | Shopping centre | Area (m$^2$) |
|---|---|---|
| 1 | Suria KLCC (Lot A, B, C) | 232,995 |
| 2 | Berjaya Times Square S. Mall | 162286 |
| 3 | Midvalley Megamall | 158983 |
| 4 | Sunway Pyramid | 153282 |
| 5 | Pavilion Kuala Lumpur (Retail) | 150503 |
| 6 | One Utama Complex, Bandar Utama (Termasuk One Utama Expansion) | 138042 |

**2. Regional (27,870.912m$^2$-74,322.432m$^2$)**

| No | Shopping centre | Area (m$^2$) |
|---|---|---|
| 1 | The Gardens Mall | 74322 |
| 2 | Quill City Mall | 71535 |
| 3 | Endah Parade | 70289 |
| 4 | Sungei Wang Plaza | 68500 |
| 5 | Mines Shopping Fair | 66774 |

**3. Neighborhood (2,787.0- 18,580.6 m$^2$)**

| No | Shopping centre | Area m$^2$ |
|---|---|---|
| 1 | AEON Taman Anggun, Rawang | 17868 |
| 2 | AEON Big Wangsa Maju | 17847 |
| 3 | AEON Big Kepong | 13935 |
| 4 | AEON Big Subang Jaya SS16 | 11523 |
| 5 | CS Supermarket Bangi Avenue | 11200 |

**4. Community Centre (9290.3-37,161.2 m$^2$)**

| No | Shopping centre | Area m$^2$ |
|---|---|---|
| 1 | AEON Metro Prima | 103837 |
| 2 | AEON Bandar Bukit Tinggi | 69860 |
| 3 | Tesco Setia Alam | 68976 |
| 4 | Tesco Bandar Puteri Bangi | 65032 |
| 5 | Giant Bandar Bukit Tinggi | 64427 |

**5. Lifestyle Centre (13,192.2-53,883 m$^2$)**

| No | Shopping centre | Area m$^2$ |
|---|---|---|
| 1 | GLO Damansara (retail mall) | 349988 |
| 2 | Sunway Putra Mall | 53883 |
| 3 | Atria Shopping Gallery | 43664 |
| 4 | Tropicana City Mall | 41805 |
| 5 | D'pulze Shopping Centre | 37160 |

**6. Factory Outlet Centre**

| No | Shopping centre | Area m$^2$ |
|---|---|---|
| 1 | Mitsui Factory Outlet | 34100 |

**7. Hypermarket (4700-27,870.9 m$^2$)**

| No | Shopping centre | Area m$^2$ |
|---|---|---|
| 1 | Giant Hypermarket (Tmn Danau Kota) | 57310 |
| 2 | Tesco Extra Selayang | 17250 |
| 3 | Giant Mall Kelana Jaya | 16269 |
| 4 | Giant Hypermarket Rawang | 16258 |
| 5 | Tesco Extra Jenjarum | 15000 |

**8. Retail Podium/Plaza (1207.7-27,870.9 m$^2$)**

| No | Shopping centre | Area m$^2$ |
|----|-----------------|------------|
| 1 | Southgate (SC) | 25734 |
| 2 | KIP Mart Kota Warisan (KIP Sentral@Sepang) | 25087 |
| 3 | Bandar Park Complex (Lucky Plaza) | 25548 |
| 4 | Kompleks Mutiara | 24914 |
| 5 | Plaza Metro | 24504 |

**9. Niche/Destination Retail (18580.6-50,167.6 m$^2$)**

| No | Shopping centre | Area m$^2$ |
|----|-----------------|------------|
| 1 | Kenanga Wholesale City | 40072 |
| 2 | GM Klang Wholesale City Fasa 3 (Blok B) | 27405 |
| 3 | Low Yat Plaza | 28231 |
| 4 | Pertama Complex | 27866 |
| 5 | Lot 10 | 25614 |

**10. Power Centre**

| No | Shopping centre | Area |
|----|-----------------|------|
| 1 | IKEA Cheras /MyTown Shopping Centre | 41000 |
| 2 | IKANO Power Centre Mutiara Damansara | 36871 |
| 3 | IKEA | 31450 |

## 5. Conclusion

Finally, based on the categorization of shopping centre, there are ten (10) shopping centre in Malaysia including super regional, regional, neighbourhood, community centre, lifestyle centre, factory outlet centre, hypermarket, retail podium/plaza, niche/destination retail and power centre. All the shopping centre is a top 5 shopping centre in Malaysia based on size and criteria for each shopping centre. The criteria were come out from the literature review of shopping centre in over the world. The criteria and categorized shopping centre were chosen through the benchmarking analysis. Then, the Delphi Method was used to validate the criteria of shopping centre for the 3 rounds. All the shopping centre was used as a respondents sampling for the next data collection. Each shopping centre has 10 respondents which are involve tenant, customer and worker. Since the shopping centre has 10 categorize, the total is 440 respondents. However, this study to purpose for 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 exist. (ICSC, 2009). 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. It can be betterment benchmarking for Malaysian property industry in general and expected to provide insights to the stakeholders in improving their investment and business decision of the shopping centre in Malaysia and also can be more attractive shopping centre for tourism purpose.

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# Biographies

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