

# TO PARK OR NOT TO PARK?

THE SUCCESS OF A SHOPPING CENTRE



SACSC

South African Council of Shopping Centres



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Recently conducted research in South Africa has proven that there are two main drivers of shopping centre development. The first is the population growth and the second is the disposable income of the inhabitants in the catchment area. It then can be concluded that the income level of the population is directly related to their ability to spend, as well as their demand for car ownership.

Car ownership, in turn, will have an effect on the demand for parking space at shopping centres frequented by these residents. The extent, to which this demand for shopping centre parking is addressed during development stages of the centre, will ultimately contribute to the success of the shopping centre **and the convenience thereof for the customers.**

Research findings conducted for a specific shopping centre might indicate that the shoppers rank the parking availability as the most important feature of the centre. It could also indicate that parking related problems are the biggest deterrent to visiting the same centre.

These answers are uncovered when analysing their shopping behaviour. Posing questions such as: 'When do you normally visit the centre?' and comparing quiet weekday mornings to Saturdays at noon, shoppers are likely to find much more parking available during the week than on weekends.

There are currently an estimated 10.5 million registered vehicles in South Africa (*Source: [www.enatis.com/Vehicle Population Statistics August/September 2013](http://www.enatis.com/Vehicle Population Statistics August/September 2013)*). More than 68% of these registered vehicles are motor cars and mini buses. The growth in motor car ownership is one of the most important trends that will influence shopping behaviour in future.

### This Parking Research Report will answer the following questions:

- Will shoppers avoid visiting specific shopping centres because of parking and traffic problems?
- Will parking problems result in a change in shopping behaviour?
- What will put additional pressure on parking in future?
- What are the most significant parking related problems that shoppers experience?
- What are the solutions for the increase in parking related problems experienced by shoppers?
- Are the current parking standards still applicable for modern centres and changing demographics?
- What pressures do parking garages in shopping centres experience?
- Should shoppers Pay or Not Pay for parking?

### To answer these questions, this report will highlight the following:

1. Population growth and the increase in car ownership;
2. Shopper LSM profiles and car ownership levels;
3. Shopping centre growth and classification;
4. Pedestrian volumes and parking problems
5. Parking: the Positives and Negatives;
6. Parking Standards: Past and Present;
7. Parking statistics for various centres;
8. Pressure on shopping centre parking garages;
9. Parking Income and Centre Income;
10. Parking problem alleviation through management solutions.

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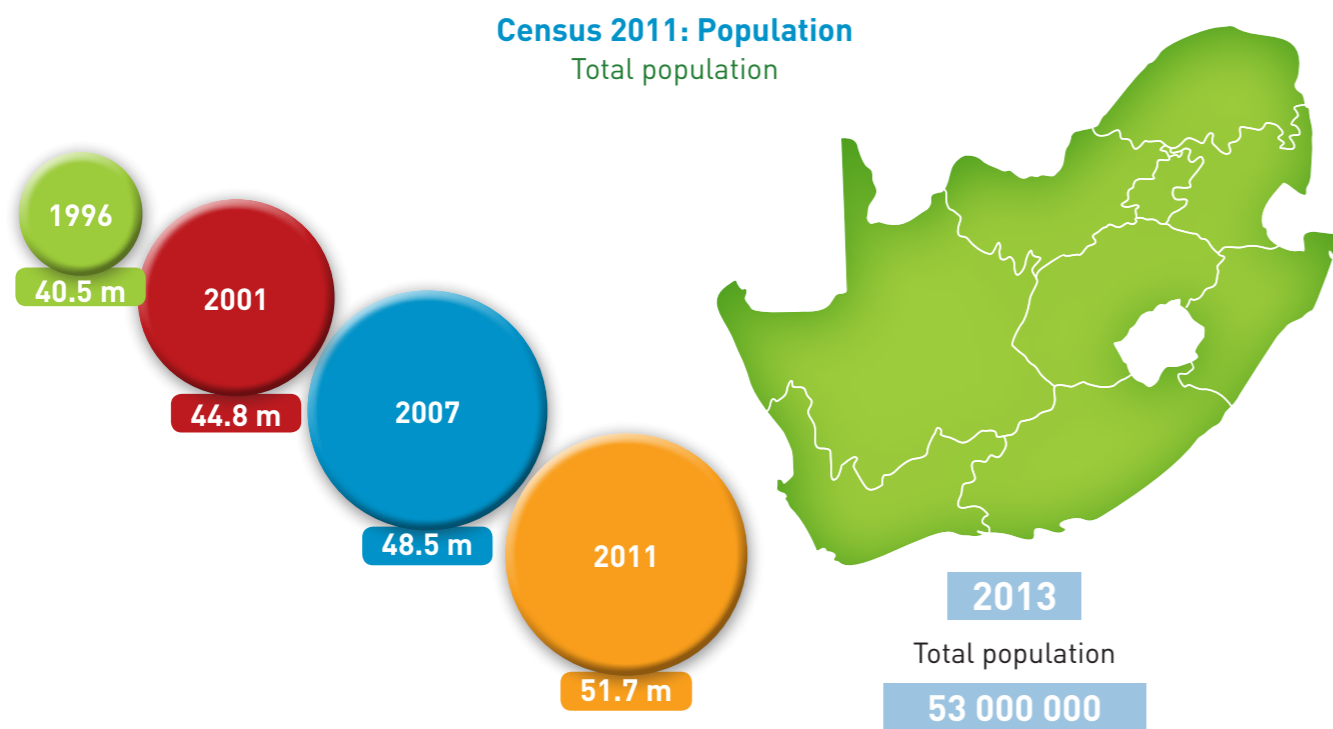
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## 1. Population Growth and the Increase in Car Ownership

South Africa currently has more than 53 million residents. The population has increased from 40.5 million in 1996 to the current 53 million. This represents an annual growth of 1.6% for this period. The number of registered motor vehicles increased from 5 267 327 in 2008 to 6 319 998 in 2013. This represents an increase of 3.7%, in motor car growth which is much higher than the population growth of 1.15% during the same period (2009-2013). (Source: [www.enatis.com](http://www.enatis.com)). This clearly highlights the **accelerated increase** in car ownership during the last 5 years.

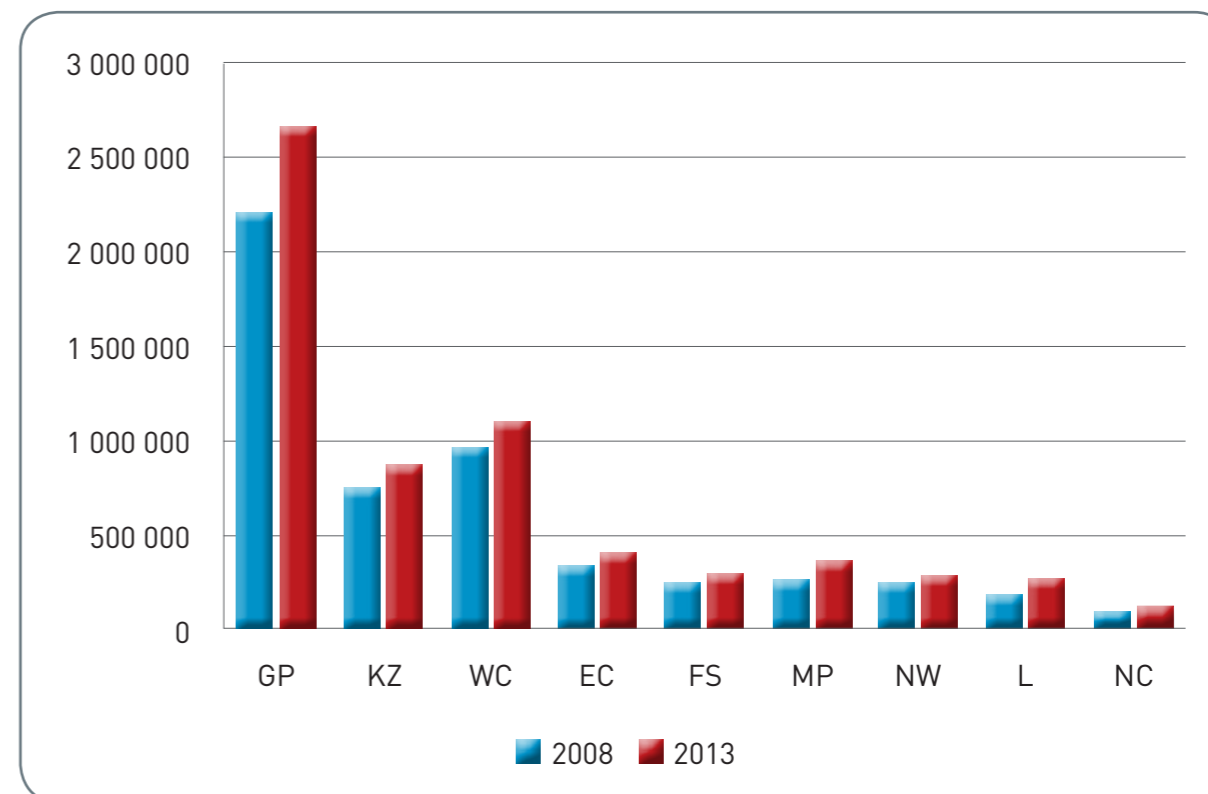
Figure 1 – Population Growth



### 3 to 5 MILLIONS FOREIGNERS

The average household income in South Africa is R10 000 per month (StatsSA Census 2011), but seven of the nine provinces are below this average, while only the Western Cape and Gauteng are well above it. The car ownership per province also reflects the same pattern.

Graph 1 – Increase in Registered Motorcar Vehicles: 2008 vs 2013 Per Province



Source: [www.enatis.com](http://www.enatis.com) 2013

South Africa is currently 63% urbanised and there is a direct relationship between the level of urbanisation and the level of socio-economic development (Source: StatsSA Census 2011). As urbanisation levels increases, so does the level of socio-economic development. As a result, the demand for vehicle ownership increases, thereby adding to the pressure on the road infrastructure.

## 2. Shopper LSM Profiles and Car Ownership Levels

The most important contributor to the increase in car ownership is the growth in the middle segment of the South African market. Graph 2, below, clearly indicates the proportion of the population represented in each of the 10 LSM categories during 2002 as well as the changes up to 2013. The middle segment of the market represented by LSM 5 – 7 increased from 31% of the total population to 53% between 2002 and 2013. This represents more than 3 million households that have moved into this income bracket.

The LSM 8 – 10 sector of the market increased from 16% to 24.5%, adding 1.7 million households to this income category (Source: SAARF Segmentation Data, 2013). The total contribution by these 5 million additional households to retail spend is approximately R60 billion per annum. A large proportion of this additional income is also spent on motor vehicles.

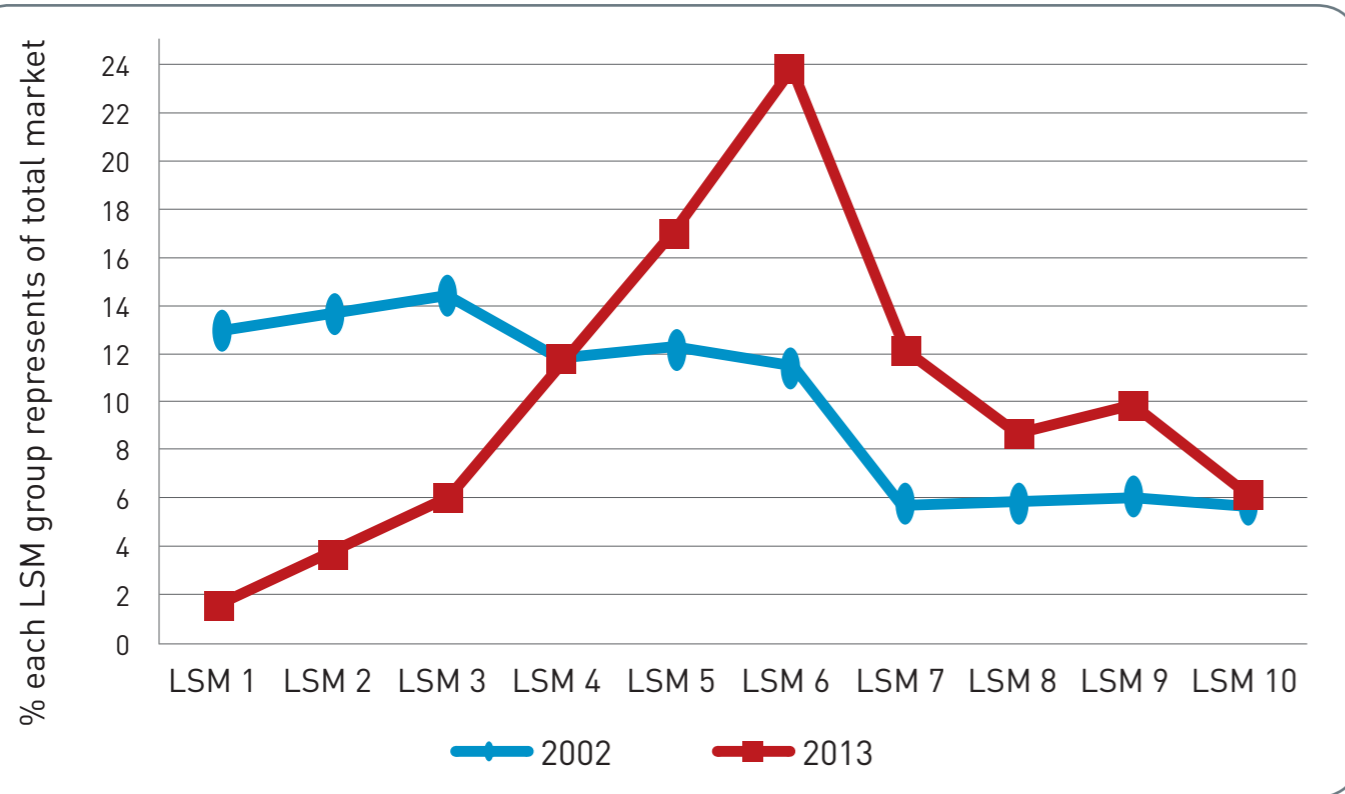


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Graph 2 – Change in the Proportion of Each LSM Group, 2002 vs 2013

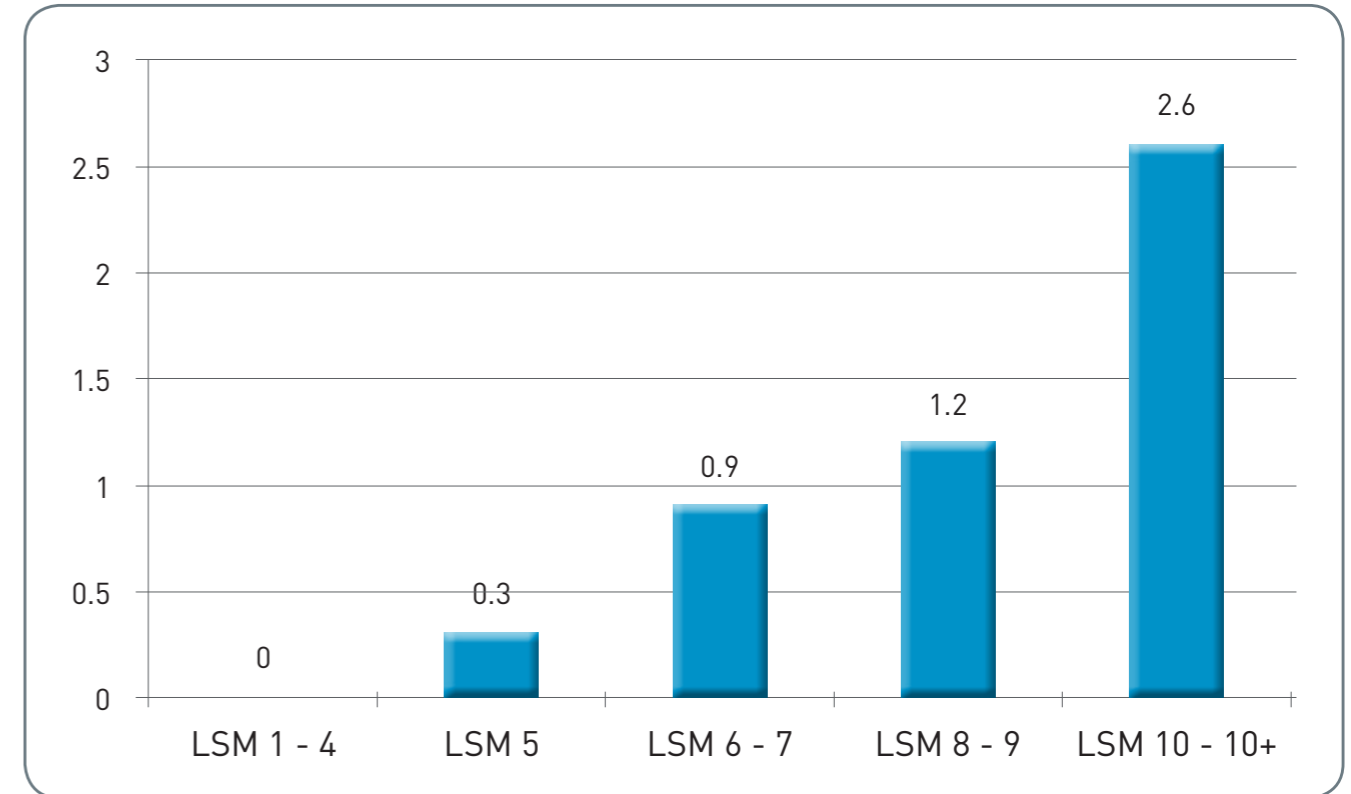


Source: SAARF Segmentation, 2013

There is a strong correlation between car ownership and the different LSM categories. Graph 3, below, indicates the low level of car ownership (2013) for the LSM 1 – 4 category, ±1 car per LSM 7 and 8 households, LSM 10 households have on average 2 cars per household and LSM 10+, 2.5 cars per household. The black middleclass is the driver for the increase in car ownership. During 2004 this segment of the market owned 23.8% of all cars, and this has increased to 43.8% in 2013 (Beeld, 4 November 2013, p 11).

Apart from the increase in income and job opportunities in different sectors of the market, the large increase in the public sector was mainly responsible for this substantial growth in car ownership. Studies conducted by Urban Studies in Soweto in 1995 indicated that 2 out of every 10 households owned a car. This has increased to between 6 to 8 out of every 10 households having a car (Various studies conducted by Urban Studies in Soweto between 2010 and 2013).

Graph 3 – Number of Cars per Household per LSM Group



Source: Urban Studies Data base, 2013

The substantial increase in car ownership over the last 10 years is already having an impact on shopping behaviour, travel patterns and the general mobility of households. In addition, the increase in disposable income has led to the demand for a wider variety of retail outlets and the support for more shopping centres. Most shopping centres in the metropolitan areas, nowadays, have a much broader LSM profile compared to 10 years ago.

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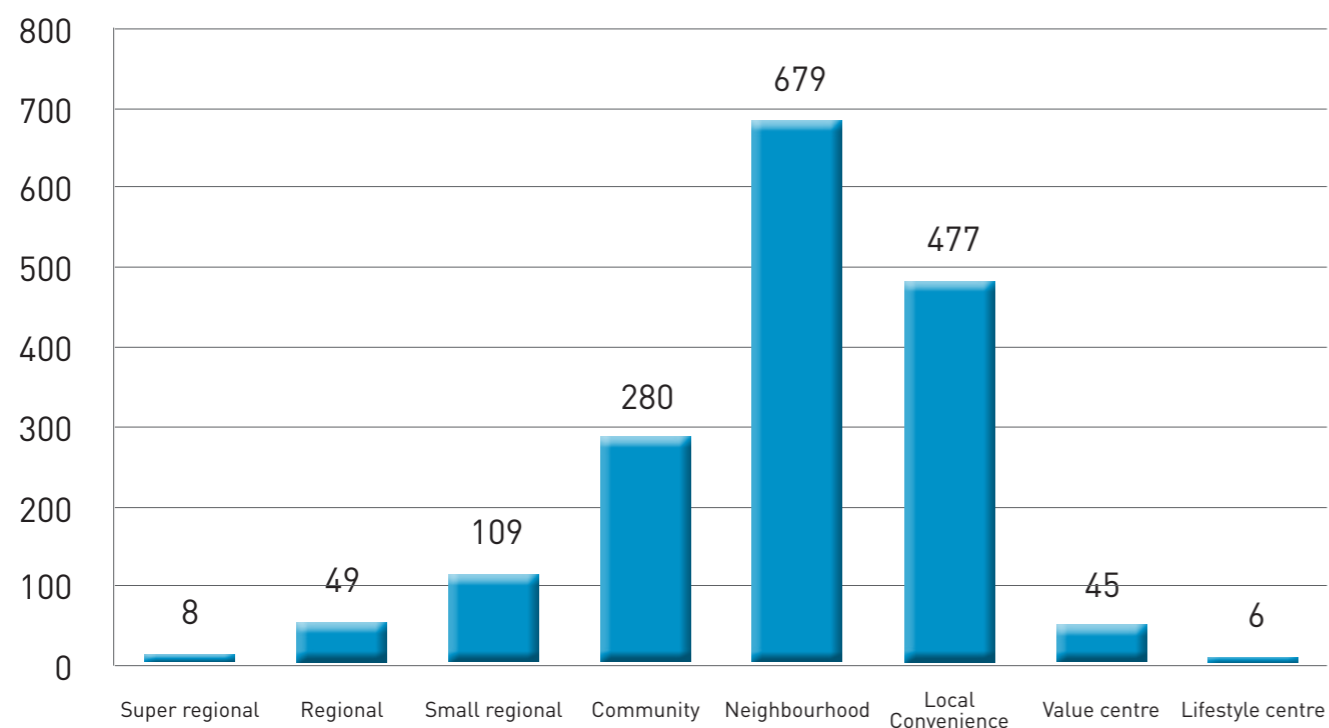


## 3. Shopping Centre Growth and Classification



South Africa currently has more than 1 600 shopping centres larger than 2 000m<sup>2</sup> (SACSC Shopping Centre Directory, 2012). Almost 75% of all shopping centres are located in Gauteng, the Western Cape and KwaZulu-Natal. This clearly indicates the concentration in the main metropolitan areas. Apart from the growth in the metropolitan areas, more than 220 township and rural centres have been developed, of which the majority was constructed within the last 10 years. These centres can be classified as small local, neighbourhood and community centres. Graph 4, below, shows the breakdown per centre type.

Graph 4 – Shopping Centre Classification

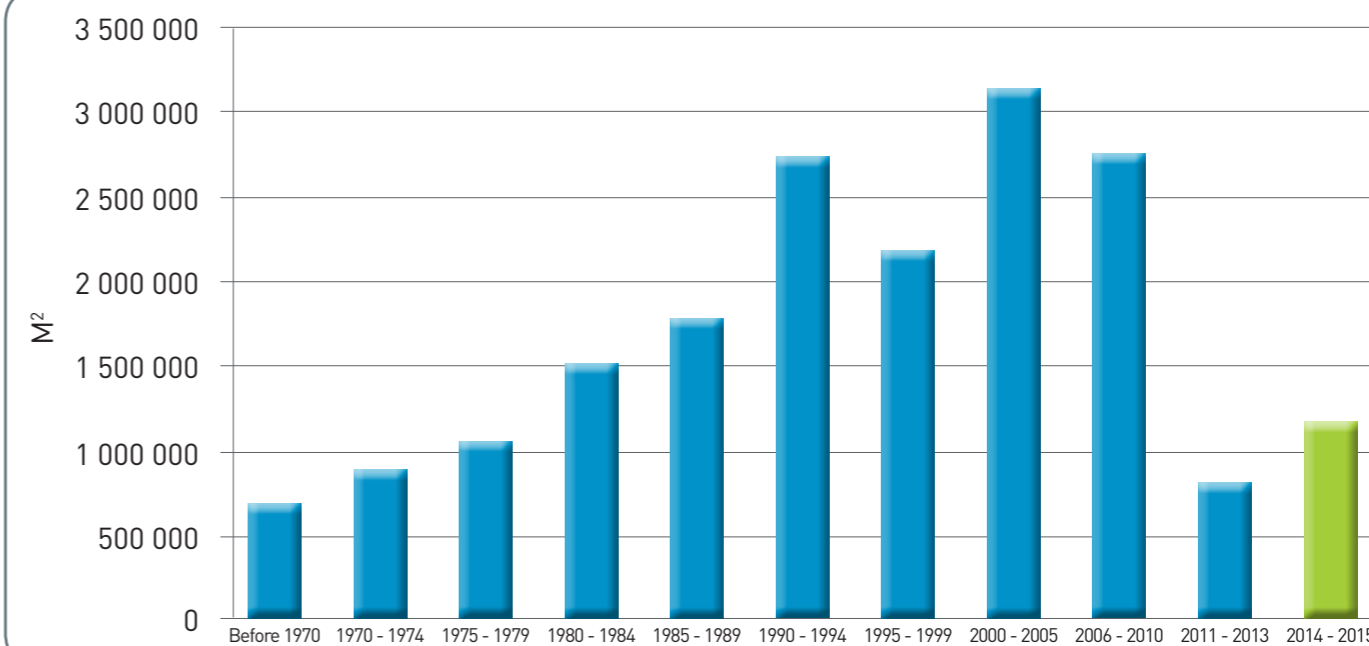


Source: SACSC Shopping Centre Directory 2012

Graph 5 depicts the growth in shopping centre space during the last decade. The high growth rate is clearly visible, with more than one million square meters being supplied, in different construction and planning stages. This will add more pressure on the roads adjacent to these centres and the provision of parking.

Most parking problems occur over weekends at the more successful, popular super-regional centres, while neighbourhood centres experience parking problems during lunch hour and late afternoon peak convenience shopping hours (Urban Studies Database, 2005-2014).

Graph 5 – Additional Supply of Retail Space 1970-2015



SACSC Shopping Centre Directories 1980-2012

As the number of shopping centres in a specific area increases, alternative routes are developed around these centres, thereby encouraging urban growth, and hence an increase in the number of vehicles in the area.

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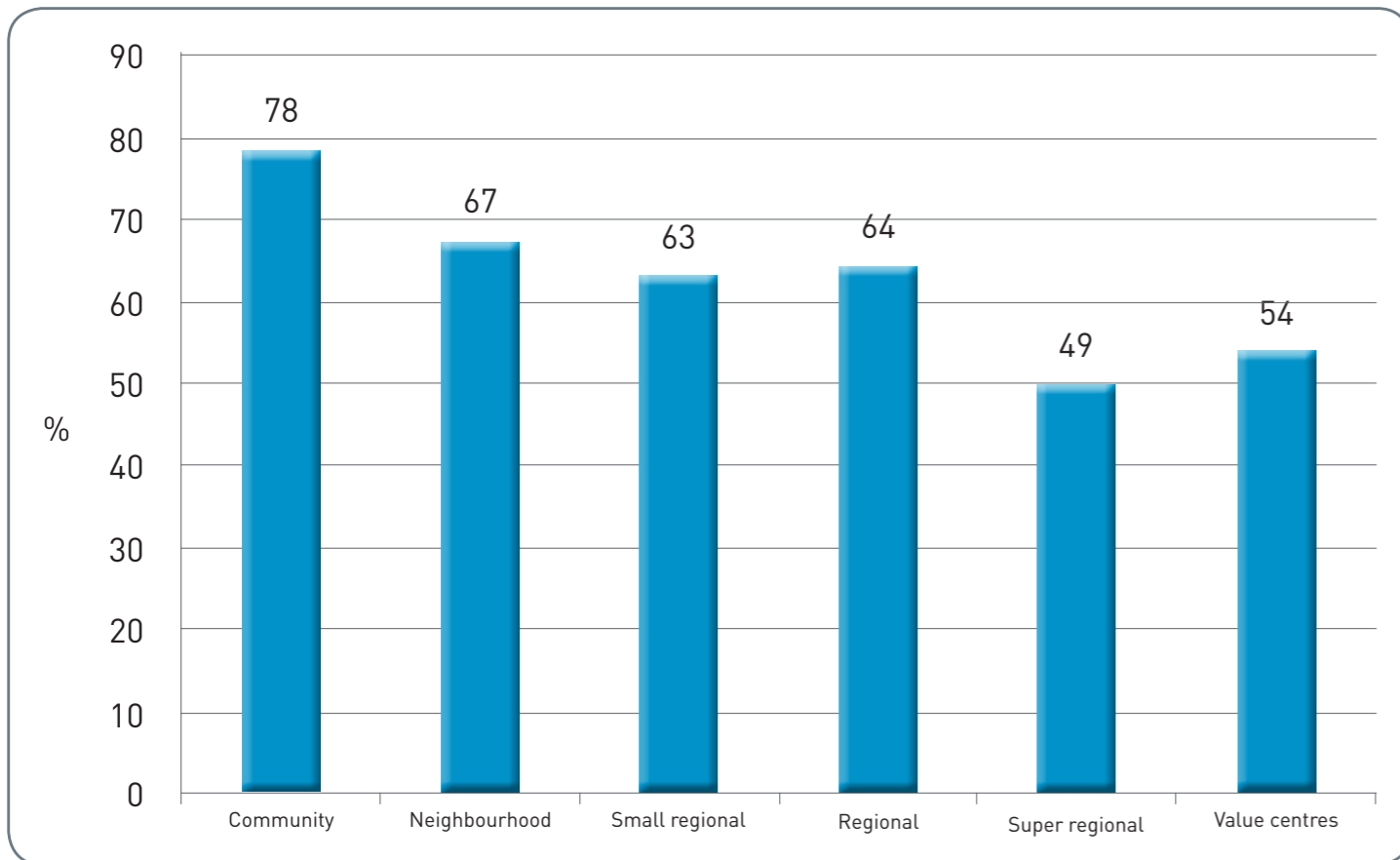
## 4. Pedestrian Volumes and Parking Problems

The frequency at which shoppers support specific types of shopping centres will have a definite impact on the parking requirements, as well as pressure in the supply of parking facilities.

Neighbourhood and community centres are visited by the majority of their customers on a weekly or more frequent basis (**Urban Studies Database, 2005-2014**). This ranges between **70% and 78% of weekly visits**.

These centres are strongly anchored by large grocery stores, which is the main reason for the high level of weekly visits.

**Graph 6 – Average Weekly Support for Different Type Centres: 1998-2012 (%)**

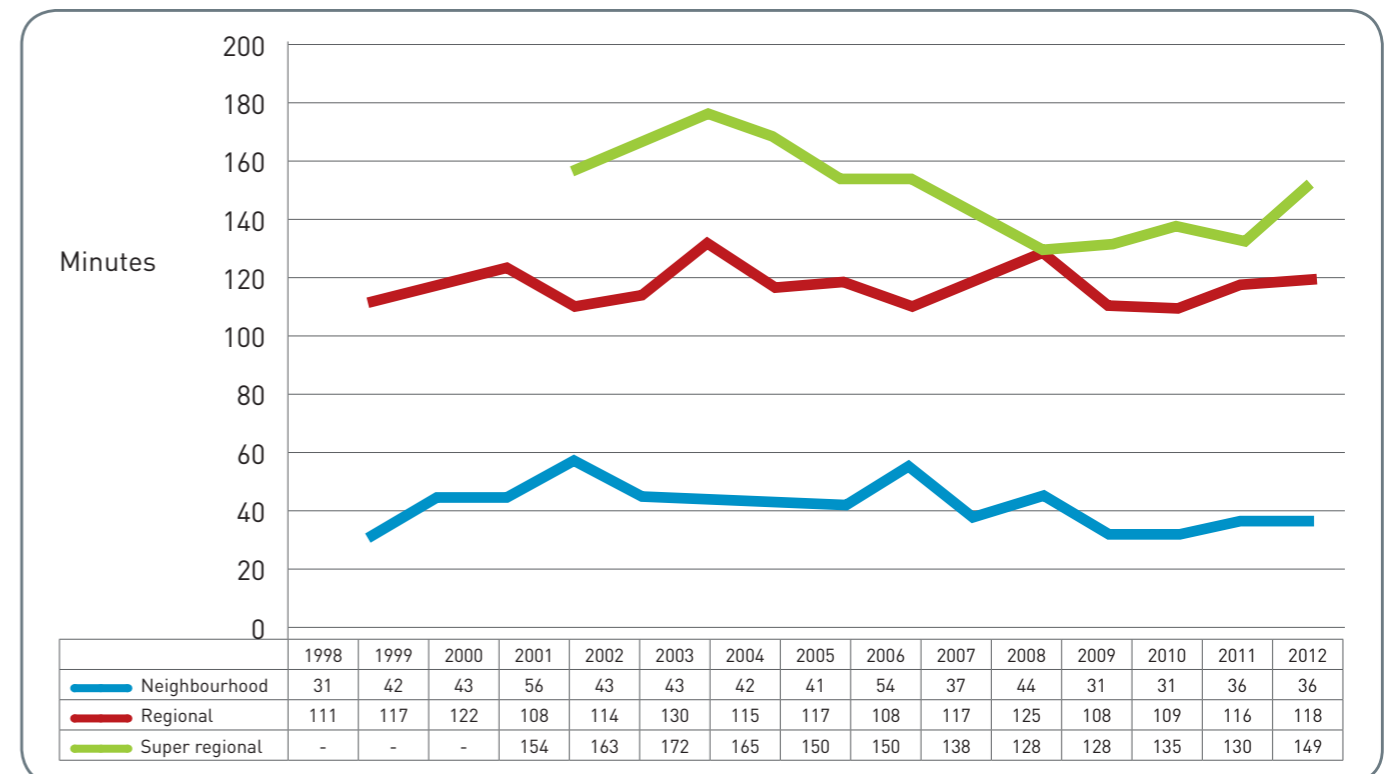


Source: SACSC, Benchmarking - South African Shopping Centre Industry International and Local Trends, March 2013, Urban Studies.

The dwell time in the different centres also varies according to the size and type of shopping centres. The dwell time in neighbourhood centres, mainly driven by convenience purchases, is between 30 and 40 minutes per trip, while the dwell time for regional and super regional centres is more than 2 hours.

The increased dwell time has a major effect on the turnaround time for parking bays.

**Graph 7 – Average Dwell Time per Trip for Different Type Centres**



Source: Urban Studies Database, 2014

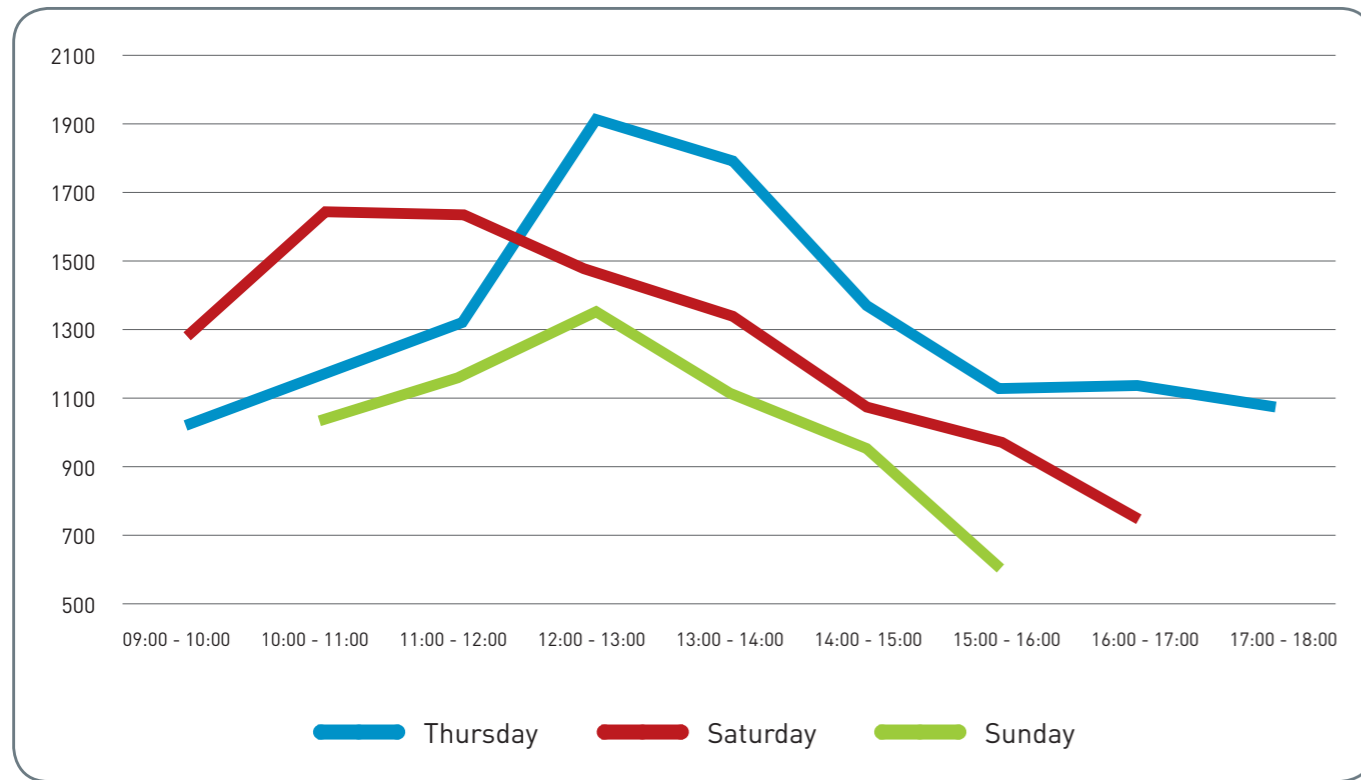
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The time of the day and the day of the week play a very important role in the take up of parking space. The graphs indicate the pedestrian flows through different centres during different days. The higher the LSM profile of the shoppers the higher the car ownership and the take-up of parking space. This very much depends on the LSM profile customer supporting a particular centre.

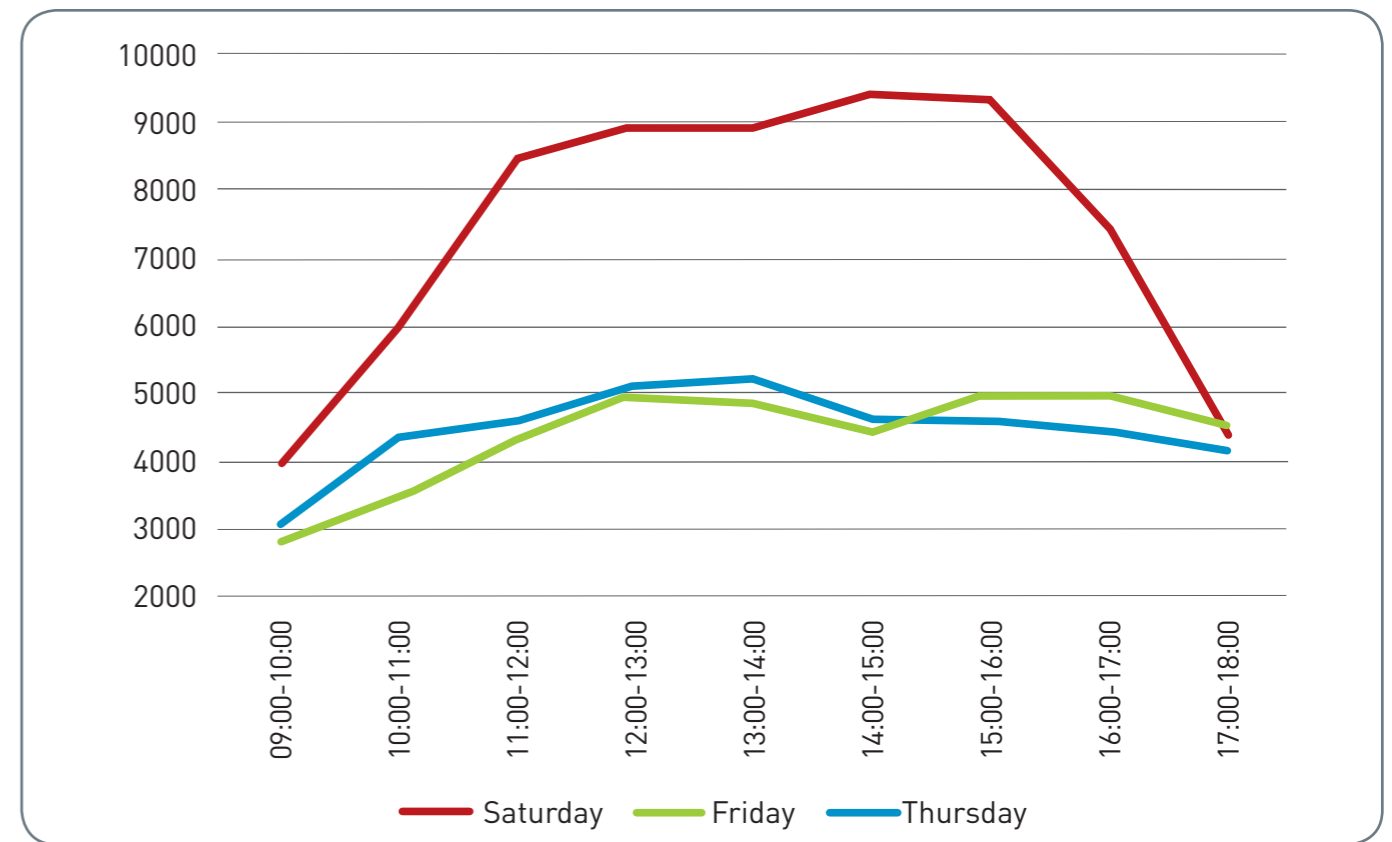
**Graph 8 – Number of People Walking Through a Community Centre per Hour per Day**



Source: Urban Studies Database, 2014

The next graph indicates a Thursday, Friday and Saturday flow through a super-regional centre. The two sets of graphs clearly indicate the high support during week day afternoons for community type centres, and the very long dwell time and peak hours for super regional centres especially on Saturdays with peaks running from 11:00 until 16:00. The average number of visitors to super-regional centres varies between 40 000 and 60 000 during weekdays, and between 70 000 and 80 000 on weekends.

**Graph 9 – Number of People Walking Through a Super Regional Centre Per Hour**



Source: Urban Studies Database, 2014

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The pedestrian/m<sup>2</sup> ratios (the number of pedestrians/m<sup>2</sup>/month) indicate whether centres are under pressure in terms of crowdedness and volumes through the centre. Neighbourhood and community centres have on average between 17 and 18 pedestrians/m<sup>2</sup>/month. This is also associated with a high weekly frequency of visits as well as a shorter dwell time. Regional and super-regional centres have on average between 12 and 14 pedestrians/m<sup>2</sup>/month, with lower weekly visits but a much longer dwell time.

**Table 1 – Pedestrian Density Ratios Per Month Per Centre**  
**PEDESTRIAN /m<sup>2</sup>/MONTHS RATIO**

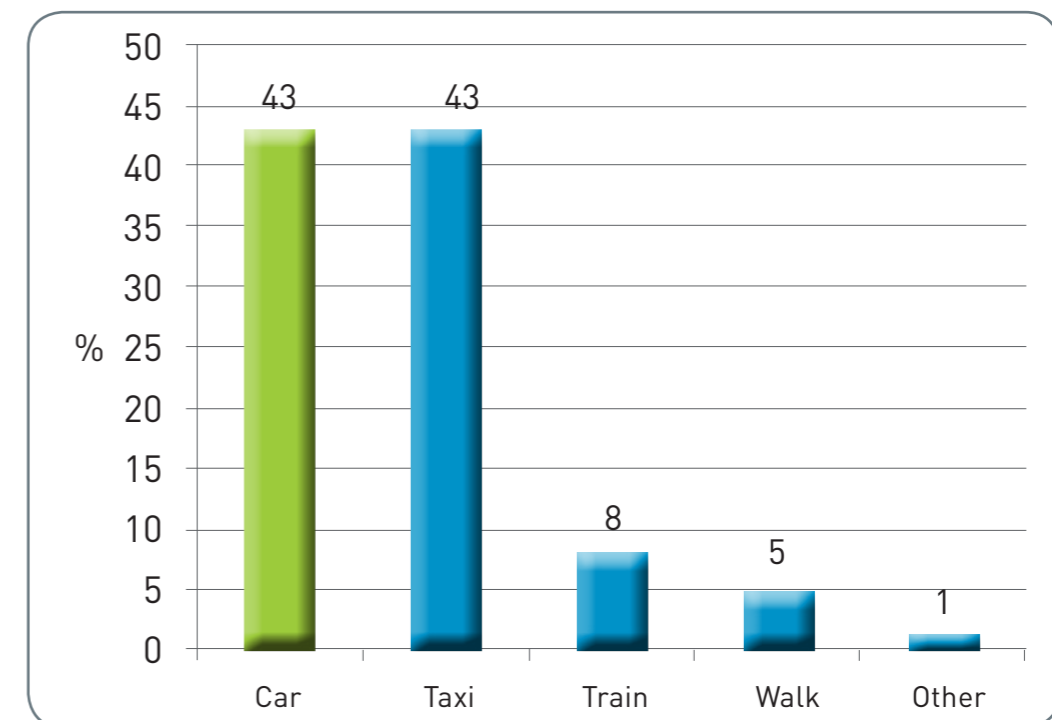
Type of centre	Range People/m <sup>2</sup> /month	Average number of people /m <sup>2</sup> /month
Neighbourhood centres	6.3 - 30.0	17.1
Community centres	6.0 - 54.0	18.3
Large community/small regional centres	6.5 - 34.0	15.5
Regional centres	7.8 - 28.0	14.0
Super regional centres	11.3 - 14.0	12.7

Source: Urban Studies Database calculated from SACSC Shopping Centre Directory, 2012

The type of centre as well as the customer profile and the geographical location determines what transport mode is used to support a particular shopping centre. The graphs give an indication of a few shopping centres and the transport mode to the centre. For some centres there is a dual customer base where car and taxi transport to a particular centre is almost equal.

Township centres are still very much dependent on taxi transport as well as the number of shoppers that walk to the centre. It is also expected that car ownership in the vicinity of these centres will influence the transport mode to the centre. Most of the metropolitan super-regional centres portray high visits by car, followed by taxi, bus or the Gautrain.

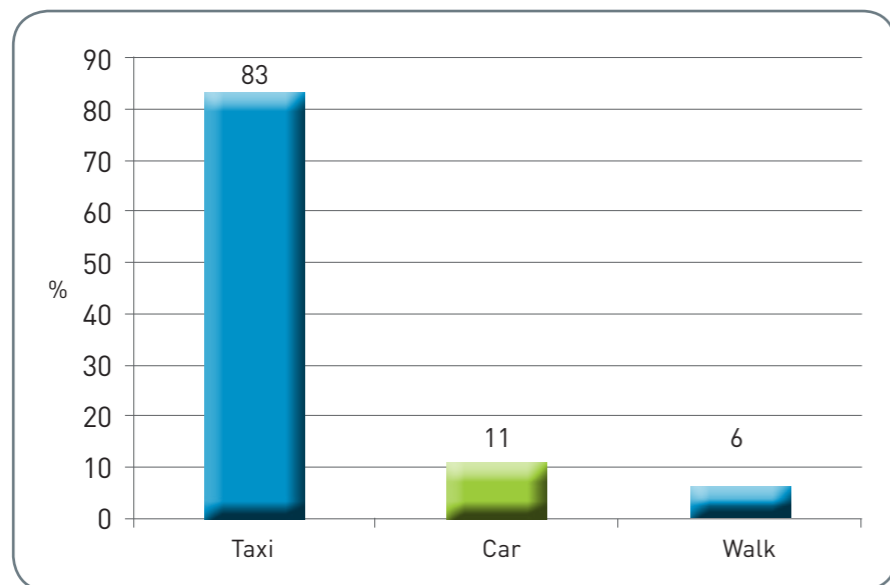
**Graph 10 - Transport Mode to Centres supported by all LSM groups.**



Source: Urban Studies Database, 2014

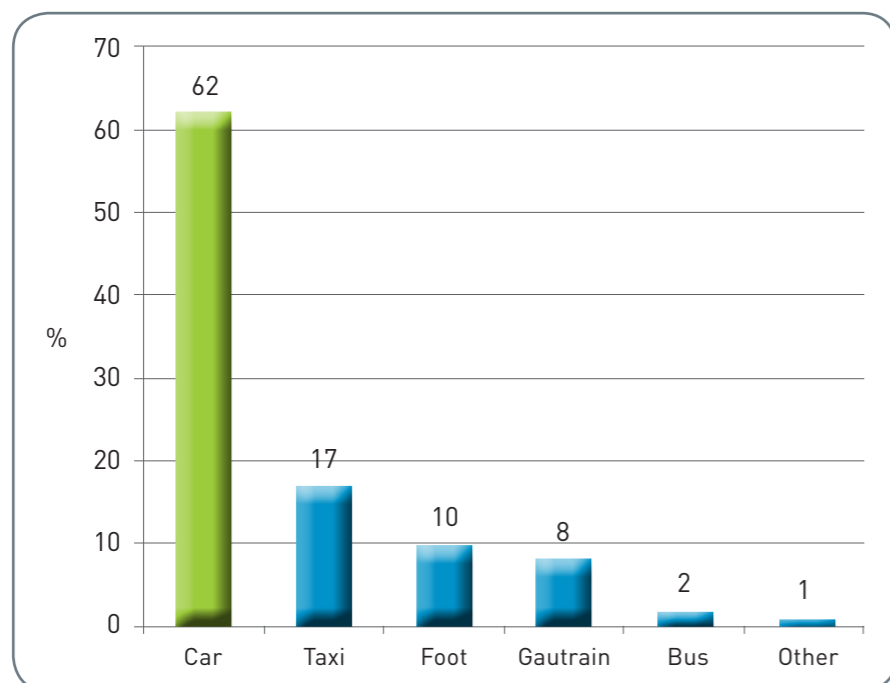


**Graph 11 - Transport Mode to a Township Centre**



Source: Urban Studies Database, 2014

**Graph 12 - Transport mode to a Large Super-Regional Centre**



Source: Urban Studies Database, 2014

Parking is strongly associated with the socio-economic profile of the shoppers, the residential area, the type of centre, the size and popularity of the centre, the time of the day and the day of the week, and the level of support of a particular centre as expressed by the number of people/m<sup>2</sup>/month.



## 5. Parking: The Positives and Negatives

In numerous studies conducted countrywide by Urban Studies the shoppers spontaneously commented on positive as well as negative aspects associated with a particular centre. There is always the concern and the questions about paid parking. The attitude of some of the shoppers is very positive towards paid parking as long as the price is reasonable, the car is safer, and protected from the sun.

In general the spontaneous positive reactions regarding parking include free parking, easy to park during the day/ morning when the centre is less busy, centres offer enough parking, and parking is available close to the stores.

The figure below also gives an indication of complaints raised regarding parking in different surveys. It is important to note these complaints because in many cases problems can easily be solved. From this table it is clear that most of the parking related problems are associated with paid parking, insufficient parking, problems experienced at the pay stations, the needs of different shopper groups not being addressed, directional signage and car guards were also mentioned as a problem.

**Figure 2 - Drawbacks of Shopping Centre Parking**

PARKING: NEGATIVES	
• Paid parking/cost of parking	• Paid parking puts pressure on shopping time
• Parking spaces/size	• No parking for cars pulling trailers
• Parking bays too narrow	• Parking pay stations don't always work
• Have a problem with the change at pay station	• Parking free only for the first hour
• Access to parking	• Congestion/not enough parking spaces
• Not enough disabled parking	• Layout/signage/ confusing
• Mom & tot/family parking full/other people use it	• Directional signage confusing
• Car guards can be a problem	

Source: Urban Studies Database, 2014



## 6. Parking Standards: Past and Present

Currently, the base legislation for parking standards is a document of the Department of Transport, South African Parking Standards, compiled in 1985, nearly 30 years ago. The requirement for shopping centre parking, in terms of these guidelines is based on the centre's Gross Lettable Area (GLA).

The SA Parking Standards for Shopping Centres (DoT, 1985) recommends the following:

**Table 2 – Past Parking Standards**

Authority	Minimum Parking Rate (Bays/100m <sup>2</sup> GLA)	GLA (m <sup>2</sup> ) of Shopping Centres
South Africa, Department of Transport (1985)	7	< 5 000m <sup>2</sup>
	6	5 000 – 15 000m <sup>2</sup>
	5	> 15 000m <sup>2</sup>

Source: Hitge and de V Roodt, 2006

It should be noted that, in terms of this policy, the number of parking bays required per **100m<sup>2</sup> GLA** decreases with increased GLA. At the time, it was assumed that the parking demand would decrease since bigger shopping centres presented the opportunity for multipurpose trips. For example, grocery shopping could be conducted along with clothing shopping, restaurant visits and entertainment, and because these outlets were visited under one roof, the demand for additional trips and hence parking, was expected to decrease.

When comparing South African legislature to The American Institute of Transportation Engineers' equivalent document of the same era (**1987**), the inverse recommendation is prescribed, with parking bays required increasing proportionately to GLA. The discrepancy between the two policies hint at an incomplete understanding of the relationship between parking demands and centre GLA. The profile of the South African shopper has changed dramatically over the last 30 years, with the aspiring shopper expecting a certain standard of amenities to be available when they visit shopping centres. Parking availability is one of the highest ranking requirements demanded.

The Parking Standards report of **1985** also makes reference to '*Regional Malls in excess of 15 000m<sup>2</sup>, with several characteristics such as 'is situated in a higher income area' and 'public transport is only used by wage earners working in the centre'* that resonate with an outdated profiling system. Today, regional centres do not need to be 'situated in higher income areas' to be successful. Trends have evolved to supplying malls in all areas where demand and buying power exist, regardless of location and income level of residents.

Furthermore, the sizes of shopping centres have drastically increased in **GLA**, for each centre type. In **2010 Urban Studies** compiled a **centre classification report for the SACSC**, using the classifications tabulated below. An investigation conducted by Excellerate Valuation and Advisory Services in 2013, shown in Table 3 below, shows the average sizes per centre type, across South Africa. The 1985 Regional Centre of **+15 000m<sup>2</sup>** is comparable to the **2013 Community Centre of approximately 16 000m<sup>2</sup>**.

**Table 3 – Centre Types and Sizes**

Centre Type	SACSC Classification	
	GLA (m <sup>2</sup> )	No. of Stores
Small free standing and convenience centre	500 - 5 000	5 - 25 stores
Neighbourhood centre	±5 000 - ±12 000	25 - 50 stores
Community centre	±12 000 - ±25 000	50 - 100 stores
Small regional/Large community centre	±25 000 - ±50 000	75 - 150 stores
Regional centre	±50 000 - ±100 000	150 - 250 stores
Super regional centre	> 100 000	> 250 stores

Alongside the evolution of centre development and its supply trends, one expects the demand for parking at these centres to have adjusted to fit consumer needs and lifestyle changes. Previous municipal sentiment encouraged urban sprawl as a means to divert vehicle users away from the city centre to alleviate traffic congestion. More recent legislation endorses urban densification as a means to promote the use of public transport to alleviate the congestion. Once again, a distinct difference is observed between past and present parking requirements for shopping centres.

In order to ensure that shoppers', whose continued contentment holds the key to the success of the centre, needs are met, an understanding of the drivers for parking should be attained. Parking design should be guided by the specific urban configuration and the role of the car should be defined in the immediate transport system to ensure optimal use of the parking facilities.

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## 7. Parking Statistics for Various Centres

It is acknowledged that provision of parking facilities should not be based on a generic linear model based on static GLA figures. Ideally, it should consider qualitative factors such as the role and function of the centre in the area. The features of the surrounding urban node and transport infrastructure should also be considered, as well as the socio-economic profile of shoppers, along with their culture (not limited to race), values and ethos.

Consider other factors that could affect the centre's role: lifestyle centres may support the use of bicycles; city centres may align themselves with BRT systems and rural centres might have a fully integrated public transport amenity, including taxi, bus and railway stations. Cognisance should be given to these additional influencing factors which are unique to each centre.

To illustrate how malls differ in terms of their GLA and parking trends, Excellerate Valuation and Advisory Services investigated 15 malls, located in urban nodes, around South Africa. Three of these centres were super regional, six were regional malls (as per Table 4). The total number of bays per 100m<sup>2</sup> retail GLA was compared to determine if a linear relationship existed between GLA and bays required.

The centres, ranked in order of their size, from largest to smallest, are given below:

**Table 4 – Excellerate Study Sample Set**

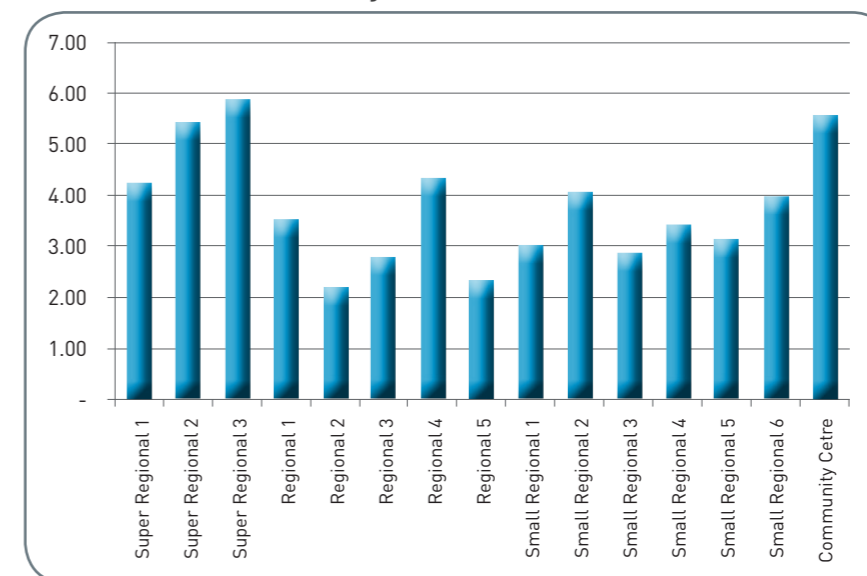
Shopping Centre	GLA	Number of Centres
Super Regional 1, 2 & 3	100 000 - 154 999	3
Regional 1, 2, 3, 4, & 5	45 000 - 99 999	5
Small Regional 1, 2, 3, 4, 5 & 6	30 000 - 44 999	6
Community Centre	< 30 000	1

**Sample Set of 15 Centres**

GLA	GLA	GLA	GLA
Super Regional 1	Regional 1	Small Regional 1	Community Centre
Super Regional 2	Regional 2	Small Regional 2	
Super Regional 3	Regional 3	Small Regional 3	
	Regional 4	Small Regional 4	
	Regional 5	Small Regional 5	
		Small Regional 6	

**Comparison of GLA to Parking Bays:** The total number of parking bays were compared to their retail GLA. It was found that no distinct relationship exists between GLA and number of bays provided.

**Graph 13 – Parking Ratios - Bays/100m<sup>2</sup> GLA**



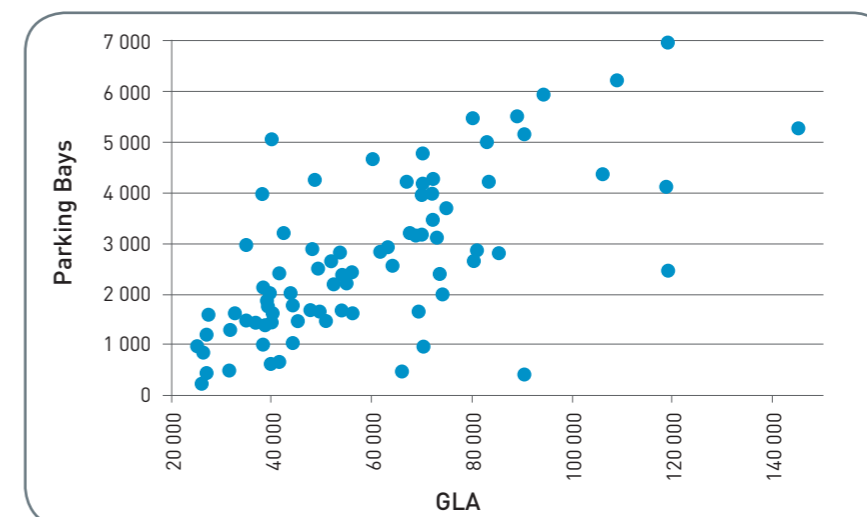
Source: Excellerate Valuation and Advisory Services

The lack of a visible trend between the GLA and number of bays required, could be interpreted in several ways: developers are possibly relying on other modes of transport; land availability could have guided the provision of the number of bays; financial feasibility of providing additional bays, are all possible reasons. What is clear, however, is that the past parking requirements are not strictly adhered to, but possibly considered alongside other contributing factors.

Excellerate Valuation and Advisory Services compared several shopping centres (additional to the 15 centres in the main study set) to graphically plot the relationship between the centre's GLA and the number of bays provided. A set of 85 centres were captured.

Graph 14 below represents the relationship between the parking and the GLA.

**Graph 14 – Parking Bays vs GLA**



Source: Excellerate Valuation and Advisory Services

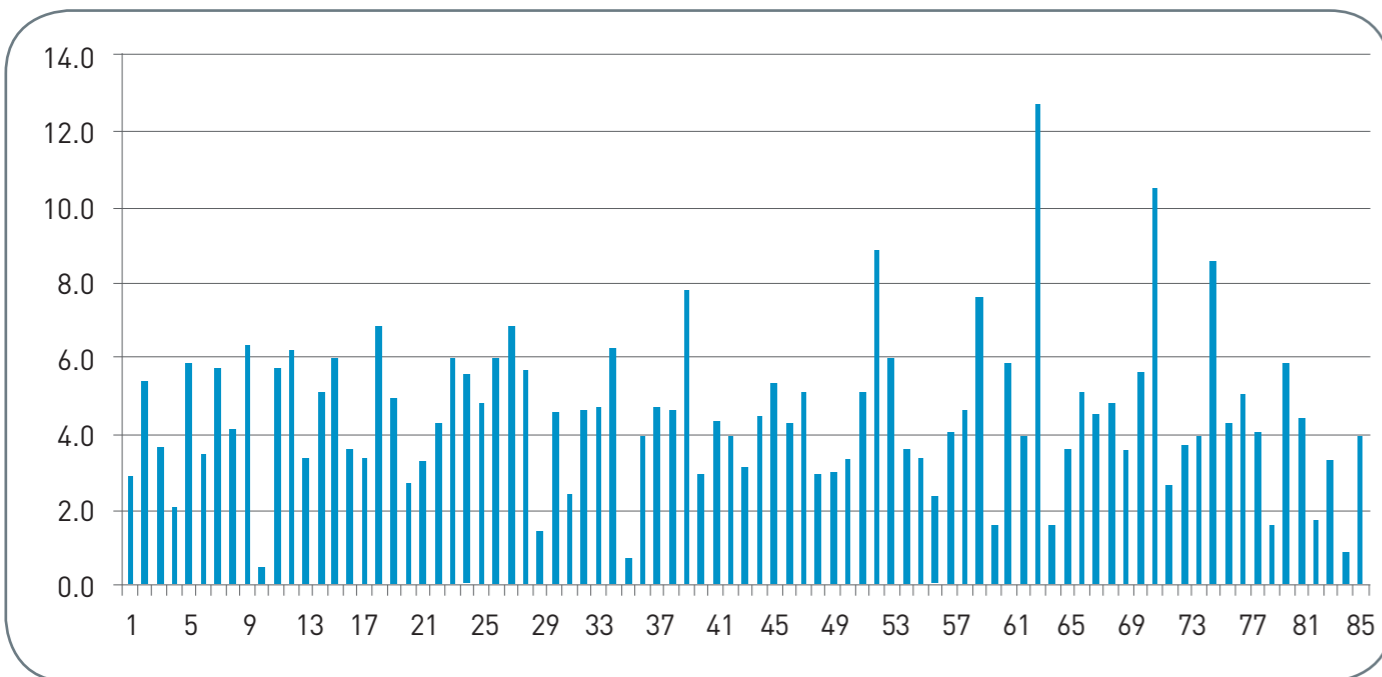
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Graph 15 shows the parking bays per 100m<sup>2</sup> GLA. Parking for these 85 centres ranges from 0.5 bays per 100m<sup>2</sup> GLA to 12.7 bays per 100m<sup>2</sup> GLA. The average supply ratio is 4.5 bays per 100m<sup>2</sup> GLA and not 6 bays 100m<sup>2</sup> of GLA as generally expected.

Graph 15 – Bays per 100m<sup>2</sup> / GLA

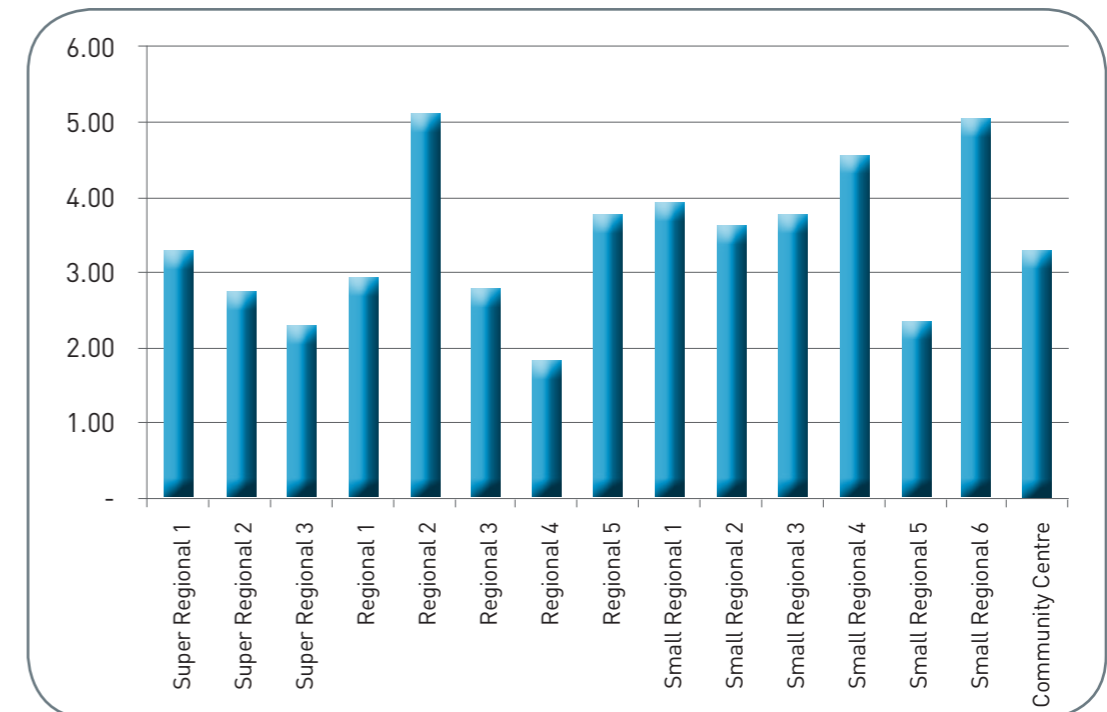


## Parking Turnaround Time vs Dwell Time



The second aspect of the investigation was the comparison of turnaround time for parking facilities across centres. The total parking transactions conducted per centre, per month, was compared to the number of parking bays for each centre.

Graph 16 – Parking Bay Turnaround Time – Transactions/Bay/Day



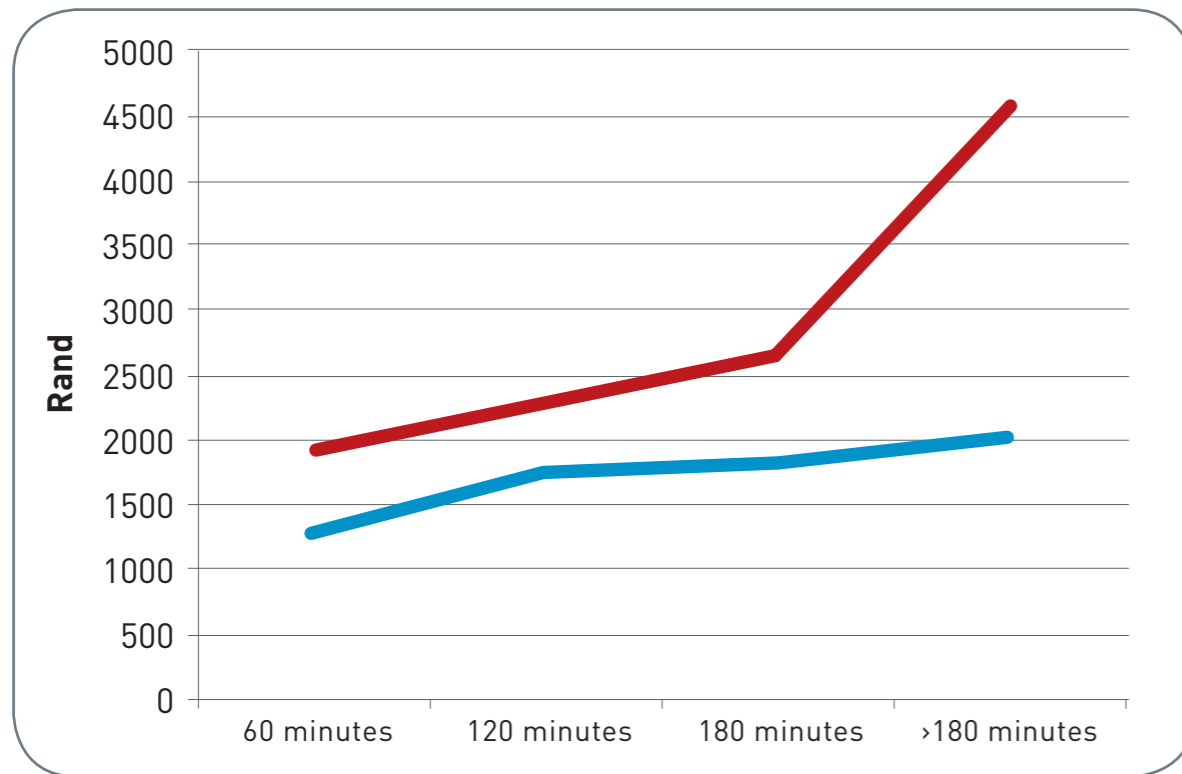
Source: Excellerate Valuation and Advisory Services

The number of transactions per bay is indicative of how often the parking lot is accessed by shoppers for a parking bay. For example, one parking bay at Small Regional 6 will be used by five different shoppers, per day, while Super Regional 3's parking bay is only used twice per day. Naturally, turnaround time is inversely proportional to dwell time. The disadvantage of the longer dwell time of a particular shopper, the less the individual bay is available to the next shopper.



The advantage, on the other hand, to landlords, is that dwell time increases spending, as shown in Graph 17, below.

**Graph 17- Spending vs Dwell Time for Two Different Centres**

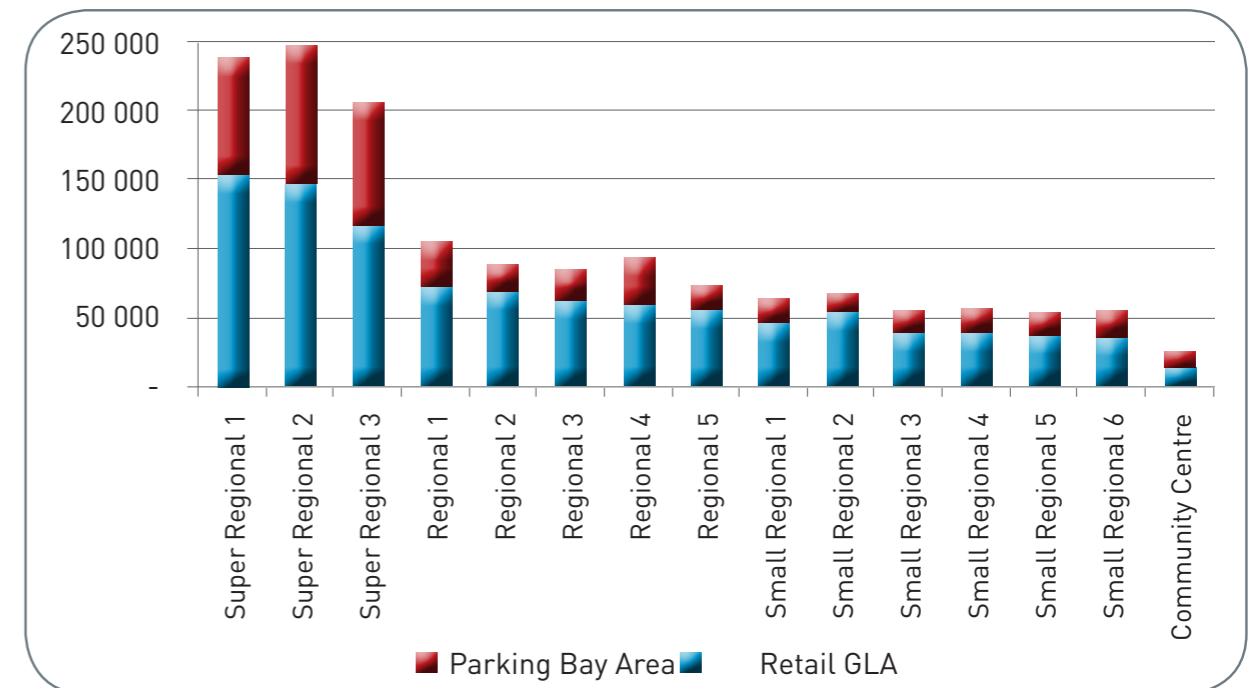


## Comparison of GLA to Parking Area

The third aspect of the investigation was comparing the proportion between retail GLA and the parking lot area, represented by the total area of the bays. (For the purpose of the study, road access areas are deemed proportional to the area of the bays provided.)

Super Regional malls provided a much larger proportion of parking area, naturally anticipating higher vehicle usage. The area allocated to parking for these malls represented 53% to 73% of GLA. Their regional counterparts only provided for 34% to 50% extra space for parking.

**Graph 18 - Ratio of GLA vs Parking Area**



Source: Excellerate Valuation and Advisory Services

Another impediment to parking availability is the difference in patterns between weekday and weekend parking usage as already indicated above. Peak times are always more likely to create strain on parking availability than during off peak periods. The patterns between malls will also depend on the location and use of a mall or shopping centre. City centre malls might have higher week day peak periods, if located close to offices, when compared to malls in suburban areas.

When analysing shopping centre parking trends, the footcount should also be considered, which will indicate the transport modes used. Footcount at entrances to parking lots should be compared to total centre footcount. Entrances which are situated closer to main road access points and public transport facilities should be compared to determine transport mode usage. Once the dominant mode is determined, the pressure on the current parking facilities can be forecasted and provided for.

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## 8. Pressure on Shopping Centre Parking Garages

The South African trend in car ownership and their preference for private transport, as indicated in Graphs 1 and 2, could possibly lead to two different outcomes.

Increased car ownership will either put irreversible and unmanageable strain on current infrastructure and private facilities, or it will initially lead to congestion then eventually create the thresholds needed to attain BRT feasibility. Until such time, the private facilities at shopping centres will bear the brunt of the South African car ownership aspiration.

### Equipment Malfunction

Equipment malfunction is the first indication of the strain that a centre experiences as a result of traffic congestion. 'Manual boom openings' are resorted to, to either relieve vehicular flow, or as a quick remedy when parking systems fail to work during crucial times and diversion is not an ideal option. Super Regional Centres are the hardest hit by equipment malfunction, simply due to the volumes of vehicular traffic passing through their entry points. The total number of 'manual boom openings' for one of the Super Regional Centres has increased from approximately 2 000 openings per month in 2011 to nearly 2 500 in 2013.

The above fact represents short term pressures. In the long term, developers and transport engineers will turn to minor adjustments to parking configurations to achieve client brief specification for increased parking bays. These are already experienced by shoppers in malls where land availability is limited. Marginal reduction of parking bays, smaller turning circles, the introduction of single direction lanes to maximise parking area are already being introduced in some newer centres where the luxury of parking is paid for with premium ticket prices.

Whether the aim is to maximise bay numbers and accommodate more shoppers, or simply for financial gain, the result is not well received by customers who effectively vote for their preferred malls with their visits. Difficulty experienced in parking will easily answer the question whether to Park, or Not Park. The only benefit of these newer slim line designs is the marginal increase in income revenue.

## 9. Parking Income vs Centre Income



While customers are mulling over whether 'To Park or Not To Park', landlords are considering whether 'To Charge or Not To Charge'.

The benefits of the additional centre income are weighed against the customer sentiment to the grudge purchase and a decision is made. Often, the best solution involves a multiform approach, where shoppers have the choice whether to pay for parking close to entrances, or to opt for free parking and walk the slight distance to the centre from the parking lot.

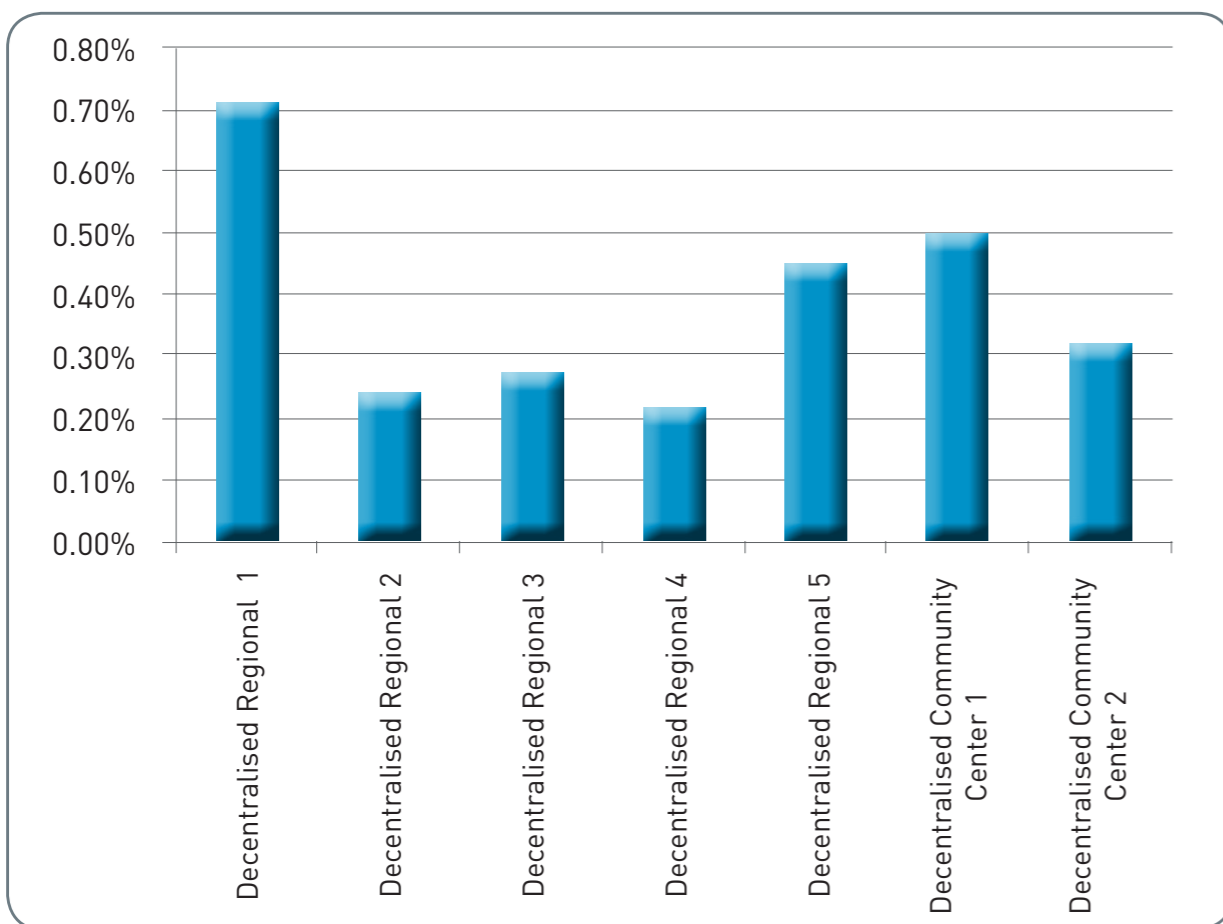
Excellerate Valuation and Advisory Services conducted an investigation to compare CBD or metropolitan centres to centres in suburban/decentralised and outlying residential areas. Parking revenues were compared between similar sized and profile centres, located in both urban and suburban nodes. In general, CBD centres achieved higher incomes compared to their decentralised counterparts.

The comparison of parking revenues achieved between similar centres in different locations is also a role of the shopper profile and as well as scarcity of parking.

Another aspect of the investigation was the role parking income plays in proportion to total centre income. This time, seven regional malls outside of the CBD were analysed. In all cases, less than 1% of total centre income comprises of parking income.



Graph 20 – Proportion of Parking Income vs Centre Income



Source: Excellerate Valuation and Advisory Services

In light of the role of parking income to the total centre income, landlords might now debate as to the merits of whether 'To Charge, or Not To Charge'.

Maximising bay numbers, increasing parking fees, not encouraging tenants to participate in 'First Hour Free' schemes all seem counterproductive in securing customer feet and harnessing the power of their spend.

Management of the dual parking system whereby both free and paid parking are provided is critical to find the balance to satisfy all parties.

## 10. Parking Problem Alleviation through Management Solutions

The increase in car ownership along with the increased supply in shopping centre supply is not necessarily all doom and gloom for managing parking facilities. Most challenges are able to be remedied or alleviated through sound management principles.

Fortunately for management, customers are fairly explicit about their likes and dislikes as well as their needs and preferences. They have identified a number of parking issues that they would like to see being addressed.

Figure 3: Possible Solutions to be Incorporated into Management Practices.



Some of our regional and super regional centres have reached the point where parking related problems will have a major impact on future shopping behaviour. Many shoppers experiencing problems over weekends are converting to weekday shopping. This will put further pressure on shopping centre business hours to cater for higher volumes during weekdays after work.

In metropolitan areas most households and shoppers make use of two or three large centres. If serious parking problems are experienced at one of the centres shoppers will start avoiding this shopping centre and patronise the other centres more frequently.

Parking problems are not only associated with the physical parking bay, but also the ingress and egress into the parking area as well as the feeding arterial routes to the centre.

# TO PARK OR NOT TO PARK?

## THE SUCCESS OF A SHOPPING CENTRE



### Parking Costs



The issue of cost was raised several times. Reduced rates for off peak periods could solve a number of issues, such as, alleviate the financial commitment to shoppers; allow them the opportunity to choose alternative times for prolonged shopping; increase weekday footcount and parking volumes, thereby reducing the large discrepancy in parking patterns in off peak and peak periods; decrease weekend congestion.

Tenants could also contribute to decreasing weekend congestion by introducing weekday promotions to attract more feet for off peak periods. Marketing mini events held during the week could target a segment of the demographic, such as 'Moms Mornings', 'Seniors' Day', and 'Teen Times'.

### Parking Configurations

Customers have remonstrated against smaller, tighter parking facilities, often with access and egress challenges. Before landlords and developers resort to maximising bay numbers, consideration should be given to the surrounding characteristics of the urban vicinity.

Certain modes of transport could be holistically incorporated such as pedestrian paths along with user friendly public transport amenities with plenty of greenery to enhance the aesthetic features of the structures. Development stage studies and research should be communicated with parking facilities managers and designers.

A wider variety of parking bays could also give users more choice when parking. Inclusion of additional family parking, disabled parking, motor cycle parking, drop off and pick up zones should reflect the demographic ratios of the residents, or follow guidelines gained from research.

Another alternative when faced with unavoidable parking space limitation is to demarcate a zone, with premium parking rates for large vehicles (and vehicles with trailers) with wider turning circles. This might be especially relevant to outer lying regions where the secondary catchment area comprises residents who visit the centre for quarterly shopping trips or for retail trade purposes. Hyper centres and bulk value stores would gain plenty of favour catering for their loyal customers travelling from afar.

### Parking Service

The last prominent theme uncovered was the issue of service, which is easily remedied with proper training of parking staff and managers. Certain malls have managed to incorporate all levels of staff, across their service providers by training them to professionally deal with both technical and administrative daily challenges. Where the issues are beyond their scope of assistance, parking attendants manifest their confidence in their ability to politely defer the problem to the relevant party. Basic hospitality training and keen attention to detail by more senior staff is key.

### 11. Conclusion



The issue of whether 'to park or not to park' should ideally not be something that customers mull over before visiting their local centre. Any ambivalence over any facet of a shopping centre will always follow the path of least resistance to a customer on a limited budget, whether time or financial. The decision to put off a visit because of impediments to the task could effectively reduce the number of shoppers to visit a centre. In the long run, customers will simply choose an easier alternative, a different mall, or simply welcome the opportunity to save precious rands by omitting the trip altogether.

Mall trips should, at best, be part of a family's monthly or weekly routine, with the ease of access for quick convenience or top up purchases, or allow them the pressure free enjoyment of prolonged multipurpose trips at their comfort and leisure.

It is expected that with the future increase in car ownership the pressure on parking at shopping centres will increase. The question asked at the beginning of this report namely: to park or not to park, will be influenced by all the different aspects mentioned above but most of all the willingness of the shopping centre management to address these problems and offer an exceptional good shopping experience.

