



REVIEW ARTICLE

THE PREFERRED RETAIL FORMAT OF MILLENNIALS IN SOUTH AFRICA

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ABSTRACT

Within the dynamic realm of consumer behaviour, this study delves into the shopping preferences of South African Millennials, leveraging qualitative methods and an interpretive paradigm rooted in social theory. Through non-probability purposive sampling, insights from 21 participants aged 18 to 35, grouped into four focus groups, are analysed using Atlas.ti 23 and guided by Morse and Field's stages. The findings unveil a nuanced interplay between online and offline shopping choices, shaped by product categories. Brick-and-mortar stores are preferred for fresh produce, high-value items, and clothing, while online platforms are favoured for budget-conscious purchases. Expansive shopping centers attract Millennials due to diverse offerings and immersive shopping experiences. Location and product range significantly impact the selection of physical stores, with local options preferred for convenience and comfort. Overall, this research underscores the enduring allure of brick-and-mortar stores among South African Millennials, especially within extensive shopping complexes tailored to their diverse preferences.

KEYWORDS

Retail, Millennials, Generation-Y, South Africa.

1. INTRODUCTION

The profitability and long-term success of shopping centres around the world is threatened by a non-stop rise and proliferation of online shopping platforms (Chalmer, 2021; Yang et al., 2022). Consequently, multiple traditional retail formats like shopping centres, urban retail parks, high street shops and brick-and-mortar shops overall are experiencing a significant decline in average footfall, despite strong customer spending (Moon et al., 2021). Although a strong preference of customers to shop online seems to be the main contributing factor to the declining footfall, the global outbreak of the COVID-19 pandemic, civil unrest, urban decay, and an oversupply of shopping centres also had an impact on the average footfall in traditional retail formats (Bhushan, 2022; Goldberg, 2023; Panzone et al., 2021). The declining footfall in shopping centres is a concern since failure to manage footfall in shopping centres might cause a retail apocalypse, which is the term used to describe the closure of shopping centres and brick-and-mortar shops due to a decline in customer footfall (Morcuende and Lloberas, 2022; Helm et al., 2020).

Concurrently, the development and use of online shopping platforms in South Africa are growing at an unprecedented rate with more and more customers buying and browsing products and services online (Heyns and Kilbourn, 2022). Although it is beneficial for customers in terms of retail preference, it will have dire effects on shopping centres in terms of its footfall, urging the need for shopping centres in South Africa to think and act innovatively and to aim their strategies at attracting customers back to shopping centres. Given that the Millennial customer segment has more purchasing power than other customer segments, and by considering their size and influence, it would be in the best interest of shopping centres to redefine its marketing strategies aimed at attracting this generational cohort back to its physical retail space (Lee et al., 2021; Suchak et al., 2022). For the purpose of this study, Millennials refer to customers that were born between 1986 and 2005 (Li and Jing, 2018; Markert, 2004).

Singh and Dangmei are of the opinion that despite Millennials' preference to buy products online, they do still tend to buy from brick-and-mortar stores if a unique experience is created (Singh and Dangmei, 2016). Marketers and retail management should therefore focus their marketing efforts on creating unique experiences to attract Millennials to shopping centres.

Shopping centres need to create more targeted and personalized marketing efforts in order to attract Millennials. However, for shopping centres to innovate and strategize in this regard, it is necessary for their management to have a good understanding of where Millennials currently buy and where they prefer to buy certain products. Although footfall in shopping centres dropped dramatically due to lockdowns during the COVID-19 pandemic, it was found in a report by Eighty20 that the largest shopping centres in South Africa have now recovered their footfall numbers with most of the largest shopping malls reaching pre-COVID footfall numbers (Eighty20, 2022). It is thus clear that there has been a substantial change in the way customers buy and that little information is available regarding the current preferred retail format of Millennials post-COVID. The purpose of this study is therefore to determine the preferred retail format of Millennials in South Africa.

2. LITERATURE REVIEW

2.1 Retail

This section discusses the concept of retail, which is the process of selling goods or services directly to customers for personal use (Fransoo et al., 2019). Retail includes various activities such as purchasing, merchandising, marketing, and customer service, whereas retailers are businesses that buy products from manufacturers or wholesalers and sell them to the public for profit (Okwu and Tartibu, 2020). Lui and Ke explain that retail can take several forms such as brick-and-mortar stores, online

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stores, pop-up shops, mobile stores, and vending machines (Lui and Ke, 2021). A group of researchers define Brick-and-mortar stores as physical locations where customers can buy products in person (Ganesh et al., 2020). Some researchers refer to online stores as stores that operate exclusively on the Internet, offering customers the convenience of shopping from home (Koch et al., 2020). On the other hand, pop-up shops are viewed as temporary retail locations set up in different locations to promote a particular product or brand (Henkel and Toporowski, 2021). Mobile stores sell products on wheels (out of a truck or other mobile vehicles) and create a unique experience for customers (Pesko, 2021). Vending machines are also a form of retail where customers can purchase goods or services on the go (Marinelli et al., 2021).

Despite the diverse range of retail formats available, the industry is facing a significant challenge termed the *retail apocalypse* (Tordjman et al., 2021). A group of researchers claim that this trend involves brick-and-mortar retailers, especially those in shopping malls, struggling to compete with online retailers, leading to declining sales and foot traffic (Tordjman et al., 2021). Morcuende and Lloberas concur that many retailers have downsized or closed altogether, resulting in job losses and economic hardship for communities that rely on retail (Morcuende and Lloberas, 2022). However, some group researchers affirm that some retailers have adapted to the changing landscape by offering unique in-store experiences, combining their physical and online presence, or focusing on niche markets (Helm et al., 2020).

2.2 Retail Apocalypse

The term *retail apocalypse* refers to a trend in the retail industry characterized by the closure of many physical brick-and-mortar stores, often resulting in abandoned or struggling shopping malls (Morcuende and Lloberas, 2022; Tordjman et al., 2021). A group research point out that this trend has been driven by a number of factors, including the rise of e-commerce, changes in consumer behaviour, the COVID-19 pandemic and the high operating costs of brick-and-mortar stores (Sumarlah et al., 2021). The primary contributing factors to the retail apocalypse that is focused on in this study are depicted in Figure 1 and discussed subsequently.

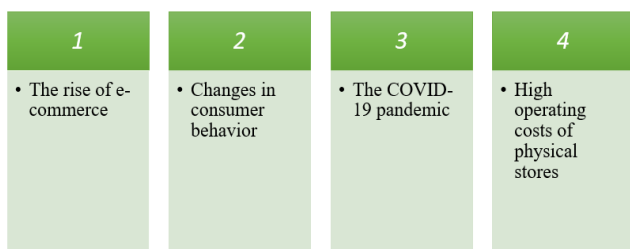


Figure 1: Factors contributing to the retail apocalypse (Source: Cavan, 2022; Helm et al., 2020; Redda, 2021; Sumarlah et al., 2021).

One of the primary factors contributing to the retail apocalypse is the growing popularity of online shopping (Cavan, 2022). E-commerce platforms such as Amazon have made it easier than ever before for customers to shop from the comfort of their own homes, and as a result, many brick-and-mortar stores have struggled to compete (Chenarides et al., 2020). Consequently, this has led to a decline in foot traffic and sales, and many retailers have been forced to close their physical locations. A group researchers contend that in addition to the rise of e-commerce, changes in customer behaviour have also contributed to the retail apocalypse (Helm et al., 2020). Chatterjee (2021) agrees and adds that today's customers are more focused on experiences and are less likely to spend money on material possessions. This has led to a decline in demand for certain types of products, such as apparel and home goods, and has made it more difficult for retailers to attract and retain customers.

Due to the COVID-19 pandemic outbreak, several retailers in shopping malls had to close their doors (Verhoef et al., 2022). Customers started to shop for essentials online rather than visiting physical stores preventing the risk to become infected (Young et al., 2022). As a result, many customers still prefer to shop for essential goods online rather than to visit shopping centres due to the ease of online shopping. During the epidemic customers had less disposable income to spend due to salary cuts, resulting in a sales decline for most retailers (Sheth, 2020). Overall, the COVID-19 pandemic had a negative impact on the shopping centre visits of consumers (Bhushan, 2022). Another factor contributing to the retail apocalypse is the high cost of operating a physical store (Redda, 2021). A

group researchers point out that rent, utilities, and other expenses can be prohibitively expensive, especially for smaller retailers with limited resources (Childs et al., 2020). As a result, many brick-and-mortar stores find it difficult to stay afloat, particularly in areas with high rents or low foot traffic.

The retail apocalypse has had a significant impact on the economy, particularly in terms of job losses (Van Niekerk and Cloete, 2020). Many retail workers have been laid off as a result of store closures, and the decline of the retail industry has had ripple effects throughout the economy (Panzone et al., 2021). Shopping centres, which were once hubs of activity, have been hit particularly hard, with many struggling to attract new tenants and remain financially viable (Akturk and Ketzenberg, 2022). Mende and Noble affirm that despite the challenges facing the retail industry, some retailers have managed to adapt and thrive in the changing landscape (Mende and Noble, 2019). For example, some retailers have embraced e-commerce and expanded their online offerings, while others have focused on creating unique in-store experiences to attract customers. However, for many retailers, the retail apocalypse remains a significant challenge, and it remains to be seen what the industry's future will look like in the years to come (Castigliano, 2022).

2.2.1 Retail Format

Some researchers define retail format as a term used to describe the way a retailer presents and sells its products to customers (Benoit et al., 2019; Shi et al., 2018). It is argued by that choosing the right retail format is critical for the success of a business, as it can significantly impact customer base, revenue, and overall performance (Jindal et al., 2020). There are several retail formats, each with its advantages and disadvantages (Deka, 2018). The most common types of retail formats are subsequently discussed.

Brick-and-mortar stores: These are physical retail locations where customers can browse and purchase products in person (Watson, 2020). Sternas and Kamne explain that these stores can range from small boutiques to large department stores and offer a variety of products, including clothing, electronics, home goods, and groceries (Sternas and Kamne, 2018). One of the primary advantages of brick-and-mortar stores is that customers can physically inspect and try products before making a purchase, which can be a significant advantage for retailers selling products that require a tactile experience (Sheth, 2021). However, Sheth proclaims that brick-and-mortar stores come with higher overhead costs, such as rent and staffing, and may require a larger initial investment (Sheth, 2021).

Online stores: These are retail formats that exist exclusively on the Internet (Bhat et al., 2022). A group researchers explain that customers can shop for products from the comfort of their own homes and have them delivered directly to their doorstep (Moon et al., 2021). According to online stores can be operated by a single individual or a large corporation and can offer a wide range of products from all over the world (Wai et al., 2019). Moreover, add that online stores also provide valuable data on customer behaviour and preferences, which can help retailers make informed decisions about their product offerings and marketing strategies (Qiang et al., 2019). However, Ali argues that online stores also face challenges, such as competition from other online retailers, shipping costs, and the need to invest in website design and user experience (Ali, 2020).

Pop-up shops: These are temporary retail locations that appear for a short period of time, often to promote a particular product or brand (Boustani, 2021). A group researchers propound that these shops can be set up in a variety of locations, such as a mall, a street corner, or a festival, and can generate buzz and excitement around the products being sold (Rudkowski et al., 2019). According to Overdiek, pop-up shops can be a low-cost way for retailers to test new markets and gauge customer interest in new products (Overdiek, 2018). However, pop-up shops may also have limited foot traffic and can require a significant investment in marketing and logistics (Boustani, 2021).

Mobile stores: These are a type of retail format that operates out of a vehicle, such as a truck or a trailer (Weissman et al., 2020). These stores can be set up in a variety of locations and can travel to different neighbourhoods and events to reach customers (Chakraborty, 2022). Mobile stores can be particularly useful for reaching customers in areas where there is a lack of access to traditional brick-and-mortar stores, or for catering to niche markets (Wishon and Villalobos, 2016). However, Wishon and Villalobos are of the opinion that mobile stores may also have limited inventory and may not be able to offer the same level of product selection as larger retailers (Wishon and Villalobos, 2016).

Vending machines: argue that these are automated retail formats that allow customers to purchase products with the push of a button (Wenshan et al., 2015). A group researcher suggest that vending machines can be found in a variety of locations, such as airports, office buildings, and shopping malls, and can sell a variety of products, including snacks, drinks, and personal care items (Marinelli et al., 2021). Vending machines require minimal staffing and can operate around the clock, making them a convenient option for customers (Kirkpatrick, 2023). However, Kirkpatrick is of the opinion that vending machines may not be suitable for all product categories and may require a significant investment in machine procurement and maintenance (Kirkpatrick, 2023).

In conclusion, the choice of retail format is an important decision for retailers and depends on a variety of factors such as the type of products being sold, the target customer base, and the retailer's budget and resources. Retailers may also choose to use a combination of retail formats to reach a wider audience and maximize sales.

2.2.2 Retail Industry in South Africa

The retail industry in South Africa is a vital sector of the country's economy, generating significant revenue and employment opportunities (Neboh et al., 2022). The industry has experienced consistent growth in recent years, despite challenges such as economic fluctuations, increasing competition, and changing customer behaviour (Das et al., 2022). According to Makhitha, the retail industry in South Africa is divided into formal and informal sectors (Makhitha, 2017). The formal sector is made up of established retail chains, while the informal sector is comprised of small and independent retailers. The formal retail sector dominates the industry, accounting for approximately 80% of all retail sales in the country (Makhitha, 2017). Teuteberg lists the major retail chains in South Africa as Shoprite, Pick n Pay, Spar, and Woolworths (Teuteberg, 2020). Mwamba and Qutieshat propound that these retailers operate in various segments, such as supermarkets, hypermarkets, and department stores, and offer a wide range of products to customers, including food, clothing, and electronics (Mwamba and Qutieshat, 2021).

In recent years, the South African retail industry has seen an increase in the number of international retailers entering the market, such as Zara, H&M, and Cotton On (Teuteberg, 2020). This has led to increased competition and forced local retailers to adapt to changing customer preferences and demands. The COVID-19 pandemic has had a significant impact on the South African retail industry, resulting in store closures, reduced foot traffic, and supply chain disruptions (Lomberg, 2023). However, Buss is of the opinion that the pandemic has also accelerated the growth of e-commerce and digital retail, with more customers turning to online shopping to meet their needs (Buss, 2022). Despite the challenges facing the industry, the South African retail sector is expected to continue growing in the coming years (Fraser, 2023). The rise of e-commerce, increasing urbanization, and a growing middle class are expected to drive demand for retail products and services, while retailers will need to focus on adapting to new technologies and evolving customer trends to remain competitive (Schoeman, 2023).

2.3 Millennials

Millennials, also known as Generation Y, are a demographic cohort born roughly between the early 1980s and the mid-1990s (Markert, 2004). This generation is currently one of the largest and most influential groups in society, representing a significant customer segment and workforce (Suchak et al., 2022). Scheling and Richter propound that Millennials are often characterized as being tech-savvy, diverse, and socially conscious (Scheling and Richter, 2021). A group researchers concur that they grew up in a time of rapid technological advancement, with access to the internet and mobile devices from a young age (Hensley et al., 2019). As a result, they have a strong preference for digital communication and are more likely to use social media and online platforms to engage with brands and make purchasing decisions (Hensley et al., 2019; Scheling and Richter, 2021). In terms of customer behaviour, state that Millennials are known for being more frugal and value-conscious than previous generations (Lerro et al., 2019).

They are also more likely to prioritize experiences over material possessions and have a strong interest in sustainable and socially responsible products (Herosmyth, 2017). Additionally, Millennials tend to be more brand-agnostic and willing to switch between brands based on convenience, quality, and price (Ordun, 2015). As the largest generation in the workforce, Millennials are also reshaping the modern workplace (Frey, 2018). Moreover, they prioritize work-life balance, seek out job opportunities that align with their values, and prefer a collaborative and

inclusive work culture.

A group researcher claim that this generation also tends to have a strong entrepreneurial spirit, with a higher rate of self-employment and a desire to start their own businesses (Da Silva et al., 2019). In the retail industry, Millennials represent a significant customer segment, with their purchasing power expected to grow in the coming years (Goshtai, 2019). As a result, many retailers are focusing their marketing efforts and product offerings to appeal to the values and preferences of this generation (Moreno et al., 2017). These efforts include a shift towards sustainable and ethical products, as well as investments in e-commerce and digital marketing channels. Overall, Millennials have a significant impact on society and the economy, with their unique values and preferences shaping the retail industry and the modern workplace.

3. METHODOLOGY

This research took a qualitative stance and employed an exploratory methodology. Consequently, a fitting framework needed to be chosen as the foundation of the study's development (Creamer, 2018). Hence, an interpretive paradigm rooted in social theory was embraced, given its emphasis on participants' perspectives and their portrayal of the surrounding environment. To enhance the qualitative exploratory method and the interpretive paradigm, a qualitative descriptive research design was incorporated, offering a comprehensive depiction of the phenomenon under examination (Sandelowski, 2000). The study's target population included customers aged 18 to 35 (minors aged 16 and 17 were excluded for ethical reasons) to represent the Millennial generational cohort at the time of conducting this study.

Non-probability purposive sampling was used to select participants. Data was collected by means of conducting focus group sessions until a point of data saturation was reached, culminating in a total of four focus groups and 21 participants. The audio recordings underwent transcription and analysis using Atlas.ti 23, following the method outlined by encompassing four key stages (Morse and Field, 1996). These comprised data comprehension, synthesis, theorization, and re-contextualization. To ascertain the reliability of the findings, Guba's criteria (1981) were employed, addressing aspects of credibility, transferability, dependability, and confirmability.

4. RESULTS AND DISCUSSION

4.1 Preference of Retail Format

Participants mainly stated that their choice of retail format is dependent on the type of product that they need to buy. A large majority of participants, however, prefer shopping at brick-and-mortar stores instead of online shopping.

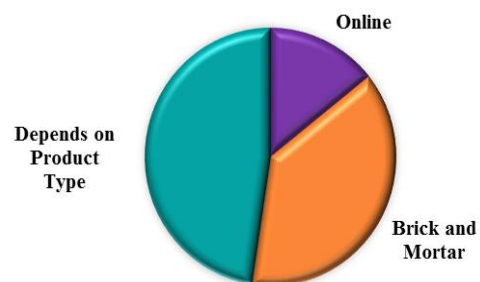


Figure 2: Choice of Retail Format

Most participants indicated that their preference for retail format depends on the type of product they need to purchase. Most of them stated that fresh produce and other grocery items are primarily purchased at brick-and-mortar stores, whilst cheaper products are bought online.

"The day-to-day things that I need, necessities, like groceries and things, I prefer to go into store, despite the availability of online."

Participant 5

"I prefer both, it also depends on the product that I am looking for and if it is a convenience product, then I would rather go in-store."

Participant 8

"It depends on the product you need and if you need it now, or can wait for it."

Participant 11

The results further indicate that participants share a preference for shopping at brick-and-mortar stores as opposed to shopping online. Most participants stated that time plays a crucial role in this decision, as they prefer to buy products and take delivery of the product immediately instead of waiting for products to be delivered by courier when shopping online. Many participants mentioned that they prefer shopping at brick-and-mortar stores due to the ability to touch and see the physical product or to fit clothing items before purchase. Participants are more inclined to buy durable and more expensive products at a brick-and-mortar store instead of shopping for such products online. Another decisive factor was the experience offered when shopping at a brick-and-mortar store; participants enjoy interacting with staff and other customers and deem it a sense of escape from their daily routines.

"I prefer brick-and-mortar cause it is just quicker. I can go into the store, get what I need and go out."

Participant 2

"I want to get out of the house, go to store, window shop, walk around."

Participant 15

"I like going to brick-and-mortar stores because I like seeing the physical

product and evaluating it for myself."

Participant 21

Only three participants stated that they prefer to shop online as opposed to shopping at a brick-and-mortar store. Participants mentioned that convenience plays a critical role in their decision to shop online and that they have a wider variety of products to select from online than at a brick-and-mortar store.

"I actually enjoy online shopping where I have a variety to choose from."

Participant 13

"I am more inclined towards online shopping, due to the convenience factor involved."

Participant 14

"I prefer online shopping. I find it to be a bit more convenient..."

Participant 20

4.2 Type of Brick-And-Mortar Store

Although the results of the study indicate that participants prefer to shop at a brick-and-mortar store as opposed to shopping online, further investigation was made to determine exactly what type of brick-and-mortar format participants prefer to do their shopping. Various types of brick-and-mortar retail formats include shopping centres, lifestyle centres, urban retail parks, and high-street stores, to name but a few.

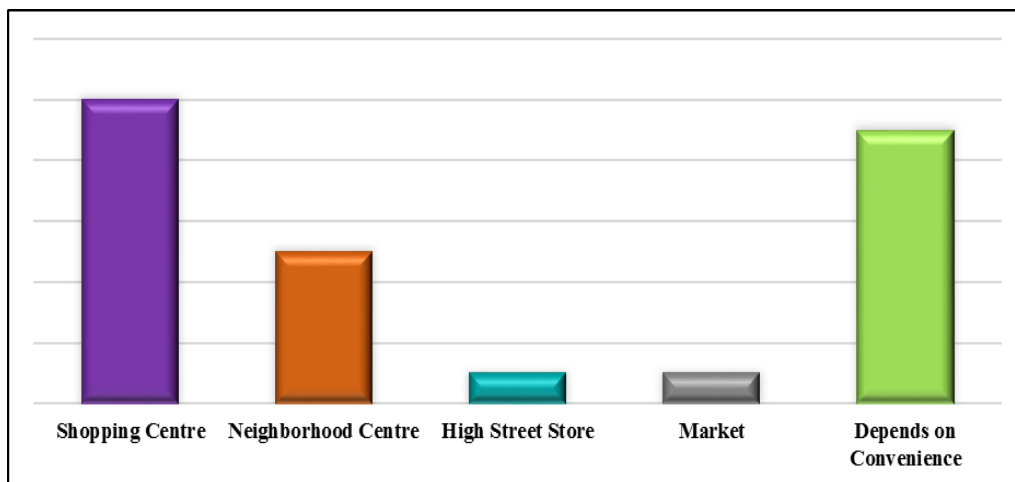


Figure 3: Choice of Brick-And-Mortar Store

Most participants prefer to shop at traditional shopping centres. The convenience of having a wider variety of stores and products under one roof proves to be an attractive factor for participants, as it saves them time having to visit several different stores in various locations to buy specific items. Participants also mentioned that they prefer the experience of shopping at a shopping centre due to the social aspect and the ability to see and interact with other people.

"...a larger retailer because it is more of a one-stop shop, so I can get everything I need. Hygiene products, including groceries and fresh produce at one place."

Participant 1

"If I had to choose between the three I definitely would go with the malls, for quite a few reasons, being the variety products and the variety stores, also for the experience. I like to experience the people, the vibe going on, so it is also just not only buying products, it's also the social part of it, and I do feel they have more options as opposed to, you know, a High Street"

Participant 12

"I prefer shopping centres, giving the convenience of that one-stop-shop experience. I also love the buzz of shopping malls and the social interaction aspect thereof."

Participant 15

Many participants also indicated that their choice of the type of brick-and-mortar store depends on the store that is most convenient for them in terms of access and location. The type of product sought also plays a decisive role, as participants stated that for smaller convenient goods, they would prefer to buy these items at a local neighbourhood centre or support a mom-and-pop type store. For larger, more expensive purchases, they would prefer to shop at a larger retail centre like a traditional shopping centre.

"Depends on the product. So if it's a bakery or just a grocery then sometimes I would rather support them, but for bigger purchases like appliances etcetera, I would rather use a bigger store."

Participant 6

"My decision would be based on convenience and the type of products sought after or needed. If I just need a couple of small things I rather go to the neighbouring centres, or neighbourhood centres or shops, and that's usually your local butchery or bakery..."

Participant 2

"I think it depends on the type of product I am currently looking for, as

well as if I want to support a local business or if they can provide me with the product I am looking for.”

Participant 11

Several participants stated that they prefer to shop at a neighbourhood centre. Participants argued that shopping at a neighbourhood centre is more convenient for them as it is located near their residence. In addition, they prefer a calmer shopping experience without the crowds that usually frequent a more significant shopping centre. Some also mentioned that they save a lot of time shopping in a neighbourhood centre instead of commuting to a larger, more centralised shopping centre.

“I prefer a neighbourhood centre that’s sort of decentralised that has all the things that I need right now, that’s easily accessible.”

Participant 3

“Hate going to big malls, so if we have to go to a mall to shop, we’ll go to the neighbourhood shopping centre.”

Participant 18

“If I can avoid going to a big, busy shopping centre, I would do that 100% of the time. I don’t like the big crowds. It makes me uneasy.”

Participant 19

Only one participant mentioned that they prefer to shop at high street stores located in the city centre, and only one participant stated that they instead prefer to do their shopping at a local market or pop-up store.

5. CONCLUSION

In summary, this study illuminates the nuanced shopping preferences of Millennials in South Africa, revealing that their inclination towards online or offline shopping is contingent upon the nature of the desired products. Notably, categories such as fresh produce, high-value items, and clothing exhibit a proclivity towards brick-and-mortar establishments, while more economical purchases find their realm in the digital sphere. The preference for expansive traditional shopping complexes among Millennials is attributed to the diverse array of stores and offerings unified within a singular space. This inclination is compounded by their affinity for the holistic shopping experience that these larger centres afford, fostering interactions with both personnel and fellow patrons. It is noteworthy that Millennials judiciously select the type of physical retail store based on variables such as location and the sought-after product range. For everyday essentials, a local neighbourhood establishment or a quaint boutique garners favor, particularly in instances where time constraints or a desire for a less congested shopping milieu come into play. Evidently, brick-and-mortar establishments continue to wield substantial allure for Millennials, particularly in the context of expansive shopping complexes that encapsulate their multifaceted shopping inclinations.

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