

THE VIRTUAL MALL: USING THE INTERNET TO CONFIGURE THE IDEAL SHOPPING ENVIRONMENT

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Overview

If the tenant mix is indeed a significant determinant of mall patronage, consumers' preferences for specific tenants should be a paramount goal in mall design and promotion. In reality, however, shoppers themselves do not participate in designing shopping centers. Customer feedback can potentially play a significant role in guiding a host of strategic decisions, including specifying the ideal mix of stores in a mall, the recreational and culinary options available and even the center's physical décor and atmospherics.

The goal of this pilot project is to demonstrate the potential of online consumer research to assess shoppers' preferences for

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the ideal shopping center configuration. To accomplish this objective, a new online methodology is employed to let consumers respond to and choose visual options as they configure their ideal mall. A national sample of over 200 consumers participated in the pilot. They chose from among 15 store categories as they populated the “skeleton” of a mall online and then selected actual retailers that would appear within each of these spaces. They also chose four anchor/department stores and four restaurant/food outlets to appear in a central food court. Results indicated that consumers exhibited clear preferences regarding the types of stores they would like to see in their ideal mall, which specific stores they favored and also where within the mall these stores should be found. For shopping center developers and retailers wishing to expand upon this initial pilot platform, the online technology developed for this project will provide insights to a range of strategic decisions ranging from the optimal mix of tenants to specific design issues.



■ Introduction

Competition for retail customers is fierce, and the mushrooming number of non-store options available to customers is fueling the fire. Why should shoppers put up with crowds at a mall when they can buy at home? If they do venture out, what drives their choice of one mall over others? Technological advances coupled with escalating time poverty represent a real threat to the American shopping center industry. Mall patronage is declining, even as the amount of retail mall space is growing dramatically (Wakefield and Baker, 1998). Some suggest that the appeal of malls is waning because too many malls look alike and shoppers simply aren't being stimulated as they once were (Templin, 1997).

How can mall developers fight back? Many retailers are realizing that the key to tempting shoppers away from their computer monitors is the value-added of the bricks-and-mortar shopping experience. Shopping is more than the act of buying. A mall is more than a place to purchase things. Indeed, a mall can be thought of as a *consumer habitat*; a communal living space where large numbers of consumers interact with each other, accumulate experiences and spend disposable leisure time (Bloch, Ridgway and Dawson, 1994). That explains the success of such destinations as

The Forum Shops in Las Vegas, Ontario Mills and the West Edmonton Mall where shoppers can experience amenities including robotic Roman gladiators, high-tech arcades, a wildlife preserve and even gambling opportunities.

In addition to “retailtainment,” an important attribute of an attractive mall is the mix of stores a shopper will encounter there. Research supports the assertion that consumers’ decisions about where to shop are influenced by the mix of stores available at a mall (Finn and Louviere, 1990; Gentry and Burns, 1978). Indeed, one study found that tenant variety was the strongest predictor of excitement in the mall shopping experience (Wakefield and Baker, 1998).

Just as many stores, whether The Gap or Neiman Marcus, have distinct “personalities” that cater to specific lifestyle profiles, the malls in which they are housed also make a lifestyle statement. This “mall personality” may be safe/Middle America, sophisticated/affluent, cutting-edge, unpredictable, etc. However, it is rare for a study to incorporate the subjective meanings of one mall versus another. Most mall-related consumer research focuses primarily upon the optimal geographical location for retail sites and largely ignores how the mall’s image may or may not attract the desired customer base.

And, much of this locational research is based upon sophisticated mathematical models incorporating such variables as the geodemographics of the location, physical land attributes, road accessibility and structure visibility. These are important questions, but they don’t address the specific lifestyle profile of stores that should be included within a mall or design features of the overall shopping center.

Consumer feedback can play a significant role in guiding a host of strategic decisions including specifying the ideal mix of stores in a mall, the recreational and culinary options available and even the center’s physical décor and atmospherics. However, it is rare for a developer to solicit consumer feedback when designing a shopping center. Given the important role the retail mix plays in determining the profile of a center, consumers’ preferences for specific tenants should be a paramount goal in mall design and promotion.

This pilot project will assess shoppers’ preferences for the ideal shopping center configuration. The implementation of a new online methodology to collect these data will demonstrate the potential value of such a research tool to the shopping center industry. This tool can assist developers in fine-tuning a center to ensure that its “personality” meets the expectations of its target customers.

Involving actual consumers in this way reflects a trend in other industries toward *user-centered design*. The idea is to incorporate current

knowledge of users in the early stages of design, confront users repeatedly with early prototypes and re-design as often as necessary. This assures that customer requirements actually do guide the development process—and that mistakes can be avoided before it's too late. Right now this perspective is more likely to be found in the design of technical products (e.g., beta-testing of software), but there is no reason why such a consumer-centric philosophy cannot be extended to involve shoppers in the construction of a shopping environment.

■ The Promise of Online Research

Conventional wisdom pits the Internet and traditional retailing outlets against each other, but insightful bricks-and-mortar merchants understand that online technology can actually benefit them instead of merely cannibalizing sales. Many equate the Internet strictly with e-commerce, but this perspective ignores the potential of such online activities as Web-based supply networks (Solomon and Stuart, 2001). The Web can be used to heighten consumers' involvement with stores and shopping—as evidenced, for example, by General Growth Properties' Mallibu.com project that provides mall and tenant information to prospective shoppers on their computers before they physically visit the setting (<http://www.generalgrowth.com/business/ebusiness/mallibu.htm>).

This pilot project highlights yet another domain where the Internet offers synergy for shopping center practitioners—conducting consumer research to maximize the fit between shoppers' expectations and strategic decisions. We are at the beginning of a revolution where conventional marketing research procedures are being replaced or supplanted by online methodologies. Conversion from mail, telephone or direct interviewing survey techniques to a Web-based format has several compelling advantages. Response time can be minimized due to automation of response protocols. It is easier to modify the research instrument or to create multiple experimental versions of it, and the survey or experiment can be conducted around the clock. The researcher has the capability of reaching a larger and more diverse subject population. Since data collection is automated and coding errors all but eliminated, data costs per respondent are considerably lower.

These compelling advantages point to the need for shopping center developers and other retailing practitioners to embrace new ways of learning about the habits, characteristics and preferences of their target market—and even to involve end-consumers in decisions related to new

product development, store image and design, responsiveness to various promotional options and so on. This pilot project is a vehicle to demonstrate the feasibility of developing online procedures to achieve these goals.

How does the system work? At the core of the methodology used in this pilot is a Web-based interactive data collection tool. This is comprised of a browser-based software interface with an extensive database layer that handles storage and retrieval of visual images. One innovative feature of the software that generates the Web pages is that it is a form of dynamic html programming called html scripting. This means that the large number of Web pages that might be required by a specific research application are not individually created html files, but are instead interactively created online in response to the behavior of the respondent. The specific pages, then, do not actually "exist" until the time of application when the program creates them "on the fly." This programming innovation is significant because it allows us to incorporate a lot of visuals into an application while largely avoiding the long download times that have plagued such approaches in the past.

The research protocol is administered to consumers on a client-server platform. The base system is designed to function on a remote server linked to the user's machine through an Internet connection. In this configuration, all Web page components reside on the server and are assembled into web pages as needed and data are input to the server databases as a continuous tracking of respondent behavior at the browser. The research tools are embedded in a password entry application that routes the respondent to the appropriate version of the application. The password entry application also serves to associate the respondent to the appropriate data record in the database, thereby permitting the interleaving of data necessary for repeated measurement protocols. Individual responses are aggregated into a database that stores these choices as a matrix. This permits simple tabulation of the most popular choices in each category as well as more complicated analyses that assess interdependencies among choices, clustering of choices by respondent characteristics, etc. More details regarding the initial development of this online methodology are provided in Englis and Solomon (2000).

■ Method

Subjects

The online survey instrument was administered to a cross-sectional panel of Americans (with Internet access at home, work or a library). These

respondents are members of an online panel of over 300,000 American consumers maintained by Survey Sampling, Inc. A goal of the study was to include respondents of diverse ages, so invitations were sent to panel members as young as 15 and as old as 54. In return for participating, subjects are entered into a drawing administered by Survey Sampling to win cash prizes.

The Online Survey Instrument

Phase 1: Basic Demographics.

When a respondent logged on and entered his/her password, the person was taken to a screener page that collected data regarding gender, age, annual household income and marital status. Following this, the next page introduced the study:

FIGURE 1.

WELCOME TO THE VIRTUAL MALL



Have you ever wished you could design your own shopping mall that would include all of the stores, restaurants and services you like? Here's your chance!

When you click on the continue button below, you'll be taken to a new page. On this page, you'll see the "skeleton" of a shopping mall just waiting for you to fill it up with retailers of your choice. We're interested in your ideas about what kinds of stores (clothing, computers, jewelry, etc.) you would put into your ideal mall, and where in the mall you would like to see them. We're also interested in which specific stores you would include in your ideal mall (for example, Abercrombie & Fitch, Williams & Sonoma, etc.). There are no right or wrong answers, we're just interested in your opinions. Your responses will be totally anonymous and they will be combined with those of other people participating in this survey. The entire process of designing your ideal mall should take about 20 minutes to complete, so have fun with it!

USER ID:

PIN:

Continue >>

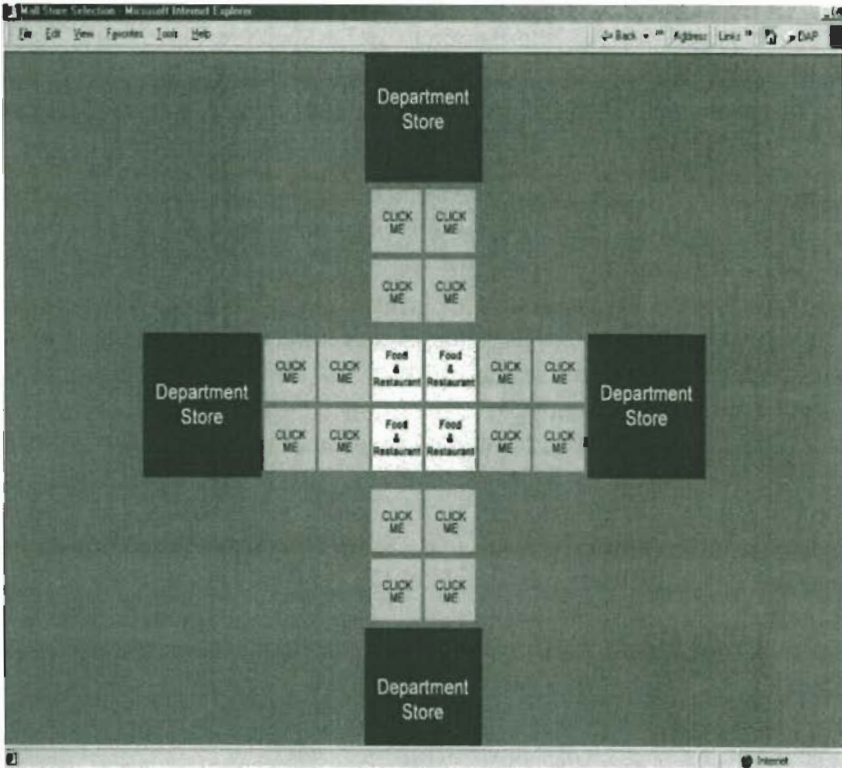
[\[CLICK HERE IF YOU DO NOT HAVE A LOGIN\]](#)

Phase 2: Store Category Selections.

Upon completion of this page, the respondent was taken to the first step of the data collection procedure. A schematic was presented of a basic

cross-shaped mall configuration consisting of four axes, each bounded by an anchor store with a food court in the middle. This layout provides for four retail stores in each of the four quadrants of the virtual mall. (Figure 2)

FIGURE 2.



Respondents were asked to designate the type of store they would like to see at each of these 16 locations. The instructions explained that a choice should be made for each of these; the other spaces (clearly marked in different colors) would always be allocated either to department stores or food outlets/restaurants. When the respondent clicked on each of the 16 available squares a pull-down menu appeared with a list of 15 store categories and he/she selected the desired store category with a click of the mouse. The categories included were:

- Accessories (e.g., Claire's Boutique, Coach)
- Cards/gifts/books/music (e.g., Barnes & Noble, Spencer Gifts)
- Children's fashions (e.g., Kids "R" Us, Osh Kosh B'Gosh)
- Electronics (e.g., Radio Shack, Circuit City)

Entertainment (e.g., General Cinema, LEGO Imagination Center)
 Health/beauty (e.g., Bath and Body Works, Sephora)
 Housewares (e.g., Williams-Sonoma, Crate & Barrel)
 Jewelry/watches (e.g., Bailey Banks & Biddle, Watch Station)
 Men's fashions (e.g., Structure, Hugo Boss)
 Men's and women's fashions (e.g., Banana Republic, Old Navy)
 Shoes (e.g., Foot Locker, Nine West)
 Specialty stores (e.g., Sharper Image, The Museum Company)
 Sporting goods/activewear (e.g., Champs, Patagonia)
 Toys (e.g., FAO Schwarz, KB Toys)
 Women's fashions (e.g., bebe, Talbots)

The pulldown store category menu is shown in Figure 3.

This procedure was repeated until all 16 squares were designated with a category. The instructions explained that the respondent could revise any of these choices as much as desired. Completion of this selection task brought the respondent to the next phase of the study.

Phase 3: Store Selections.

After the respondent had configured the virtual mall in terms of the types of stores that should be located in each space, s/he was asked to select a specific retailer within each category. Choices were made for all categories, including department stores (e.g., Sears, Nordstrom) and restaurants/food outlets (e.g., Starbucks, Applebees).

FIGURE 3.



By clicking on a square, a pull-down menu listed a set of retailers within a given category. This was not intended to be an exhaustive list of stores, but rather a reasonably representative one consisting primarily of nationally known names that would be familiar to respondents regardless of their geographic area. Once the respondent clicked on a specific store, its logo appeared in the square. As in the prior phase, the respondent could change any of these selections if desired. A sample is shown in Figure 4.

At the end of this task, the respondent had configured the complete virtual mall, resulting in a schematic like the example shown in Figure 5.

Phase 4: Demographics and psychographics.

At the end of the survey additional demographic measures assessing income, education, household size and place of residence were included. Other items assessed frequency of visits to a shopping mall and the average amount of time spent per visit. In addition, a nine-item scale assessing shopping involvement was adapted from a scale developed by Lumpkin (1985). In subsequent refinements of this initial procedure it will be possible to classify respondents' preferences in terms of such variables as region of the country, age, income, reason for visiting the mall (e.g., task-oriented versus recreational) and so on.

FIGURE 4.

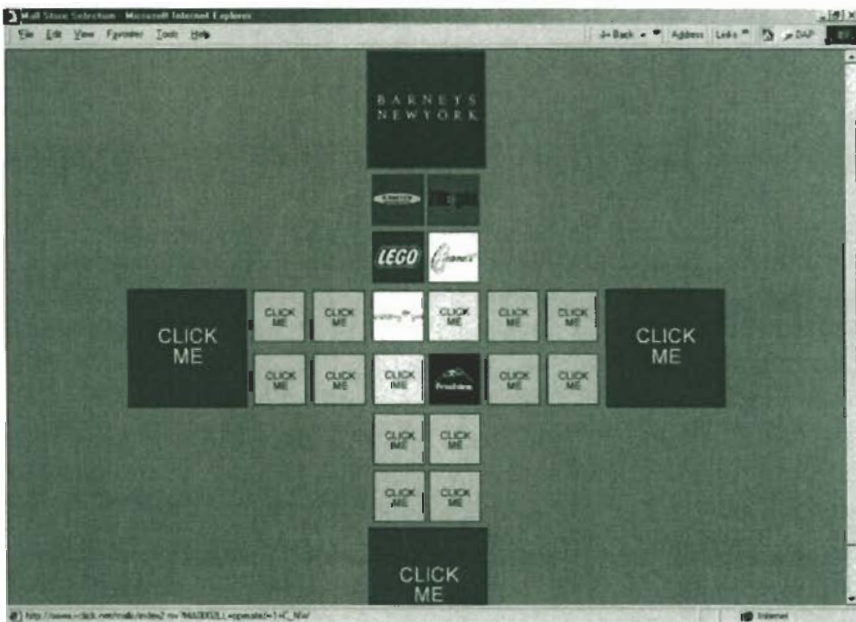


TABLE 1. BREAKDOWN OF THE SAMPLE BY AGE

Age Range	Frequency	Percent	Cumulative Percent
Under 18	22	9.4	9.4
18-24	39	16.7	26.2
25-34	59	25.3	51.5
35-44	82	35.2	86.7
45-54	31	13.3	100.0
Total	233	100.0	

As shown in Table 2, the sample was widely distributed in terms of household size. While a quarter of the sample lived alone or with one other person, for example, fully 15% reported eight or more people living in the home. Three-quarters had five or fewer people in the home.

TABLE 2. SIZE OF HOUSEHOLD

	Frequency	Percent	Cumulative Percent
1	14	6.0	6.0
2	43	18.5	24.5
3	46	19.7	44.2
4	49	21.0	65.2
5	28	12.0	77.3
6	12	5.2	82.4
7	6	2.6	85.0
8	35	15.0	100.0
Total	233	100.0	

Income, Occupation and Education

A little more than 40% of the sample reported total annual household incomes of \$50,000 or more. Table 3 provides the income distribution for the sample. Slightly less than half the sample is employed in professional or managerial positions, while another 15% are homemakers. Table 4 gives an occupational breakdown. About one-third had a college degree or an advanced degree. Educational levels are provided in Table 5.

Geographic Variables

One-quarter of the sample lives in the Midwest, followed by 22% who live in the Southwest. A summary is provided in Table 6. As shown in Table 7, a little over one-third (37%) report living in a town with a population

TABLE 3. TOTAL ANNUAL HOUSEHOLD INCOME

	Frequency	Percent	Cumulative Percent
Under 25,000	53	22.7	22.7
25,000–29,999	19	8.2	30.9
30,000–39,999	30	12.9	43.8
40,000–49,999	33	14.2	57.9
50,000–59,999	25	10.7	68.7
60,000–69,999	22	9.4	78.1
70,000–79,999	11	4.7	82.8
80,000–89,999	11	4.7	87.6
90,000–99,999	13	5.6	93.1
100,000–124,999	5	2.1	95.3
125,000–149,999	7	3.0	98.3
150,000–and over	4	1.7	100.0
Total	233	100.0	

TABLE 4. OCCUPATIONAL BREAKDOWN

	Frequency	Percent	Cumulative Percent
Professional/technical	52	22.3	22.3
Manager/administrator	50	21.5	43.8
Sales worker	6	2.6	46.4
Clerical worker	12	5.2	51.6
Craftsworker	5	2.1	53.7
Machine operator/laborer	4	1.7	55.4
Service/private household worker	5	2.1	57.5
Military	1	.4	57.9
Homemaker	35	15.0	72.9
Retired	37	15.9	88.8
Unable to work	3	1.3	90.1
Other	23	9.9	100.0
Total	233	100.0	

TABLE 5. BREAKDOWN BY EDUCATIONAL LEVEL

	Frequency	Percent	Cumulative Percent
Eighth grade	4	1.7	1.7
Some high school	23	9.9	11.6
High school degree	36	15.5	27.0
Some college/technical school	83	35.6	62.7
College degree (four year)	65	27.9	90.6
Some postgraduate	10	4.3	94.8
Graduate degree	12	5.2	100.0
Total	233	100.0	

TABLE 6. GEOGRAPHIC DISTRIBUTION

	Frequency	Percent	Cumulative Percent
Northwest	16	6.9	6.9
Pacific	18	7.7	14.6
Southwest	51	21.9	36.5
Mountain	4	1.7	38.2
Great Lakes	7	3.0	41.2
Midwest	57	24.5	65.7
Northeast	36	15.5	81.2
Mid-Atlantic	13	5.6	86.8
Southeast	31	13.3	100.0
Total	233	100.0	

TABLE 7. POPULATION SIZE

	Frequency	Percent	Cumulative Percent
Under 50,000	87	37.3	37.3
50,000–249,999	87	37.3	74.7
250,000–499,000	19	8.2	82.8
500,000–999,999	18	7.7	90.6
Over 1,000,000	22	9.4	100.0
Total	233	100.0	

of less than 50,000 and another 37% report living in a town with a population of between 50,000 and 250,000.

Specific Store Choices

Chart I provides a summary of the top three store choices within each of the three broad store categories included in the instrument. Additional analyses segmented these selections by gender, age, and shopping orientation (where the shopping involvement was subjected to a median split and two groups were created—those below the median and those above). In cases where one or more of these variables resulted in a different choice pattern (as determined by a significant X^2 statistic), that difference will also be reported with a \checkmark . Data tables are in Appendix I.

Retail Stores by Category

Of the 15 store types, the Accessories category was selected most often followed by Specialty Shops and Women's Fashions. Table 8 provides the choice frequencies across all categories.

CHART I. THREE MOST FREQUENTLY SELECTED STORES FROM DATA TABLES 9-25 IN APPENDIX I.

Table	Category	Most Frequently Selected (in popularity order)	Bias
9	Department stores	JC Penney; Sears; Target	
10	Food outlets	Applebees; Starbucks; Subway	
11	Accessories	Claire's Boutique; Afterthoughts; Coach	Gender ✓
12	Cards/gifts/ books/music	Barnes & Noble; Hallmark; Spencer Gifts	
13	Children's fashions	Old Navy; Osh Kosh B'Gosh; Kids "R" Us	Recreational shopping ✓
14	Electronics	Circuit City; Radio Shack; Electronics Boutique	
15	Entertainment	General Cinema; Tower Records; Regal Cinema—IMAX	
16	Health/beauty	Bath and Body Works; The Body Shop; GNC	
17	Housewares	Bed Bath & Beyond; Pier I Imports; Linens 'n Things	
18	Jewelry/watches	Kay Jewelers; Zales Jewelers; Tiffany & Co.	
19	Men's fashions	Men's Wearhouses; Structure; Bugle Boy	
20	Men's and women's fashions	Old Navy; Burlington Coat Factory; Eddie Bauer	
21	Shoes	Payless Shoesource; Foot Locker; Famous Footwear	Gender ✓
22	Specialty stores	Dollar Tree; The Disney Store; Petsmart	Gender ✓
23	Sporting goods/ activewear	Champs (and Champs Sports); Bass Pro Shops; Gaylan's Trading Company	
24	Toys	Toys "R" Us; FAO Schwarz; KB Toys	
25	Women's fashions	Victoria's Secret; Casual Corner; The Limited	

Spatial Contingencies

Exploratory analyses were conducted to determine if certain types of stores were more often selected to be next to department stores or adjacent to the food court. The analysis revealed a significant effect, indicating that respondents do in fact have distinct and differential preferences regarding where certain types of stores should be located. Chart II gives a summary of this analysis. It provides an overview of these preferences by

TABLE 8. STORE CATEGORY CHOICES

	Percent
Accessories	11.6
Specialty Shops	8.3
Women's Fashions	7.8
Shoes	7.6
Cards/Gifts/Books/Music	6.9
Toys & Hobbies	6.4
Entertainment	6.3
Electronics and Video	6.3
Jewelry and Watches	6.2
Health and Beauty	5.9
Sporting Goods and Activewear	5.8
Children's Fashions	5.7
Men's and Women's Fashions	5.4
Men's Fashions	5.1
Houseware & Home Furnishings	4.8
Total	100.0

giving the number of times a store position (i.e., adjacent to either an anchor or the food court) would be selected by chance (expected count) versus the actual rate of selection.

For example, one would expect by chance for Accessories stores to be placed adjacent to an anchor store 194.5 times but in fact they are placed in this position 205 times. In contrast, while this category could also be expected by chance to be placed adjacent to the food court 194.5 times, in fact they only appear in this position 184 times. On the other hand, respondents would prefer to see entertainment stores closer to the food court and farther away from the anchor stores.

■ Conclusions

The choice of a shopping mall is in essence a lifestyle decision for many consumers. While physical location is very important, all things being equal, a consumer will patronize a mall that provides the optimal assortment of stores, recreational activities and, in some cases, even the right mix of customers. This pilot study demonstrates the feasibility of using an online methodology that will facilitate the collection of this feedback from a representative sample of shoppers. Findings from subsequent studies can be used to guide marketing decisions and to identify gaps between the experiences, retailers and services that shoppers are now encountering and their ideal mall visits. The basic software and the consumer samples

CHART II. PREFERRED STORE POSITIONS BY RETAIL CATEGORY

		Store Position	
		Adjacent to Anchor	Adjacent to Food Court
Accessories	Count	205	184
	Expected	194.5	194.5
Cards/Gifts/Books/Music	Count	128	103
	Expected	115.5	115.5
Children's Fashions	Count	92	99
	Expected	95.5	95.5
Electronics and Video	Count	122	88
	Expected	105.0	105.0
Entertainment	Count	94	116
	Expected	105.0	105.0
Health and Beauty	Count	93	105
	Expected	99.0	99.0
Housewares & Home Furnishings	Count	77	83
	Expected	80.0	80.0
Jewelry and Watches	Count	89	118
	Expected	103.5	103.5
Men's & Women's Fashions	Count	94	86
	Expected	90.0	90.0
Men's Fashions	Count	93	76
	Expected	84.5	84.5
Shoes	Count	116	137
	Expected	126.5	126.5
Specialty Shops	Count	129	150
	Expected	139.5	139.5
Sporting Goods/Active	Count	96	98
	Expected	97.0	97.0
Toys & Hobbies	Count	101	112
	Expected	106.5	106.5
Women's Fashions	Count	143	117
	Expected	130.0	130.0

included in subsequent studies can easily be modified to understand better, for example, how the ideal retailer mix might vary across consumer groups or geographical regions.

This study provides insights to shopping center practitioners for a range of strategic decisions ranging from the optimal mix of tenants to specific design issues. The database structure permits an analysis of spatial contingencies that would expand upon the initial steps attempted in this pilot. This approach would be helpful in determining the optimal layout of store types among different consumer segments. For example, recreational shoppers might prefer to have a mixture of store categories scat-

tered around the mall to encourage browsing, while goal-oriented shoppers might prefer to have all stores within a category grouped together to facilitate comparison shopping and efficient purchasing. Or, the developer might want to cluster by age; youth-oriented stores might be put into one quadrant and isolated from other parts of the mall.

Yet another interesting avenue of research would be to track the clickstream of choices, i.e., to monitor each respondent's progression through the schematic. For example, do people tend to start at the top (north) quadrant and work their way around in a clockwise direction or in some other pattern? Does this differ by respondent group? Does this pattern parallel the route a shopper would take in navigating a physical mall?

In addition to the basic task of selecting from among a set of retailers, the shopping center developer could also probe for preferences regarding physical design issues and mall atmospherics. Our methodology is conducive to a wide range of pertinent issues, especially those involving the use of visuals, whether in the form of photos, sketches, or even imagery supplied by the users to convey their desires. The development of online research methodologies that are directly relevant to the shopping center industry has the potential to maximize productivity and to make available a vehicle that can provide timely feedback on a wide range of marketing and merchandising questions.

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■ Appendix I. Data Tables

TABLE 9. DEPARTMENT STORES

	Frequency	Percent
JC Penney	123	14.7
Sears	121	14.5
Target	93	11.1
Wal-Mart	74	8.9
Kohl's	60	7.2
Macy's	58	6.9
Dillard's	52	6.2
Nordstrom	51	6.1
Bloomingdale's	41	4.9
Neiman Marcus	34	4.1
Kmart	30	3.6
Lord & Taylor	28	3.3
Saks Fifth Ave.	26	3.1
Stein Mart	14	1.7
Barneys NY	8	1.0
Belk	8	1.0
Parisian	6	.7
Proffits	6	.7
Rich's	3	.4

Note: Each respondent had four opportunities to select a department store. To determine the percentage of the sample that selected a store across all four choice opportunities, multiply the percent by 4. For example, JC Penney was chosen by about 58% of the respondents to occupy at least one of the department store quadrants.

TABLE 10. FOOD OUTLET CHOICES

	Frequency	Percent
Applebees	65	7.8
Starbucks Coffee	61	7.3
Subway	56	6.7
McDonald's	50	6.0
Chick-fil-A	45	5.4
Dairy Queen	41	4.9
Burger King	39	4.7
Arby's	31	3.7
Sbarro	30	3.6
Auntie Anne's Pretzels	30	3.6
CiCi's Pizza	30	3.6
TCBY	27	3.2
Bennigan's	26	3.1
Cinnabon	25	3.0
Ruby Tuesday	20	2.4
Hooters	19	2.3
California Cafe Bar and Grill	17	2.0
Chili's	17	2.0
P.F. Chang's China Bistro	16	1.9
Great Steak & Potato Company	16	1.9
Tony Roma's	16	1.9
Healthy Express	15	1.8
Benihana	12	1.4
Häagen-Dazs	12	1.4
Captain D's	12	1.4
Pretzel Time	11	1.3
Godiva Chocolatier	10	1.2
Mrs. Fields	10	1.2
Marble Slab Creamery	9	1.1
Sweet Factory	8	1.0
Great American Cookie Co.	7	.8
Alamo Grill	7	.8
Buddha Express	6	.7
Caribou Coffee	6	.7
Buffalo's Southwest Cafe	6	.7
Great Wraps	6	.7
Freshens Yogurt	5	.6
Church's Chicken	5	.6
Frulatti	4	.5
FAO Schweetz	4	.5
Frosty Bites	2	.2
Lindt Chocolate	1	.1
Braum's	1	.1

Note: Each respondent had four opportunities to select a food outlet or restaurant. To determine the percentage of the sample that selected a store across all four choice opportunities, multiply the percent by 4. For example, Applebees was chosen by about 31% of the respondents to occupy at least one of the food court quadrants.

TABLE 11. ACCESSORIES

	Percent
Claire's Boutique	31.1
Afterthoughts	22.6
Coach	21.6
The Icing	13.4
Sleepyheads.com	11.3
Total	100.0

TABLE 13. CHILDREN'S FASHIONS

	Percent
Old Navy	23.0
Oshkosh B'Gosh	20.4
Kids "R" Us	13.1
Gap Kids	11.5
The Children's Place	8.9
Children's Place	5.8
The Limited Too	4.7
Gymboree	4.2
Baby Gap	3.1
The Snoopy Shop	2.6
Zutopia	2.6
Total	100.0

TABLE 14. ELECTRONICS

	Percent
Circuit City	27.1
Radio Shack	22.4
Electronics Boutique	16.2
Suncoast Motion Picture Company	12.4
Fry's	6.2
Audio Pro	4.8
Bose	3.3
Verizon Wireless	3.3
Wolf Camera & Video	1.9
Bang & Olufsen	1.4
Brook Mays	1.0
Total	100.0

TABLE 12. CARDS/GIFTS/BOOKS/MUSIC

	Percent
Barnes & Noble	27.3
Hallmark	20.8
Spencer Gifts	13.0
Borders	10.4
Waldenbooks	6.9
Sam Goody	5.6
Yankee Candle	3.9
Things Remembered	3.9
Brookstone	2.2
Hollywood Video	2.2
B. Dalton	1.3
Thomas Kincade Gallery	1.3
Ashley Avery's Collectibles	.9
Main Luggage and Gifts	.4
Total	100.0

TABLE 15. ENTERTAINMENT

	Percent
General Cinema	12.9
Tower Records	11.0
Regal Cinemas—Imax 3-D	11.0
LEGO Imagination Center	10.0
Wherehouse Music	10.0
Virgin Entertainment	7.1
Media Play	6.7
Musicland	6.2
Cinemark	6.2
Nascar Silicon Motor Speedway	6.2
Regal Cinemas	4.8
Hastings Entertainment	3.8
Vans Skatepark	3.3
On Cue	1.0
Total	100.0

TABLE 16. HEALTH/BEAUTY

	Percent
Bath and Body Works	49.5
The Body Shop	15.2
GNC	6.6
Regis Salons	4.0
Aveda Lifestyle Store	4.0
Eckerd	4.0
Trade Secret	3.0
Merle Norman	2.5
Crabtree & Evelyn	2.0
Sephora	2.0
Master Cuts	2.0
Origins	1.5
Perfumania	1.5
L.A. Nails	1.0
Modern Nails	.5
Nail Trix	.5
Total	100.0

TABLE 17. HOUSEWARES

	Percent
Bed Bath & Beyond	25.0
Pier 1 Imports	21.9
Linens 'n Things	.4
IKEA	8.1
Williams-Sonoma	6.9
Crate & Barrel	6.3
Pottery Barn	6.3
Lowe's	4.4
The White Barn Candle Co.	2.5
Ethan Allen Interiors	2.5
La-Z-Boy	1.3
Restoration Hardware	1.3
Haverty's Furniture	1.3
Illuminations	1.3
Kirkland	1.3
Bombay Company	.6
Total	100.0

TABLE 18. JEWELRY/
WATCHES

	Percent
Kay Jewelers	21.7
Zales Jewelers	18.8
Tiffany & Co.	17.9
Fossil	11.6
Helzberg Diamonds	6.3
Watch World	6.3
Fast-Fix Jewelry Repair	3.9
Whitehall Co. Jewelers	3.9
Bailey Banks & Biddle	2.4
Gordon's Jewelers	2.4
Reeds Jewelers	1.4
Mayors Jewelers	1.0
Littman Jewelers	1.0
Watch Station	1.0
Marks & Morgan Jewelers	.5
Total	100.0

TABLE 19. MEN'S FASHIONS

	Percent
Men's Wearhouse	33.1
Structure	21.9
Bugle Boy	16.0
Armani Exchange	10.1
Duck Head	4.7
Hugo Boss	4.1
Mr. Rags	3.6
PacSun	3.6
Loehmann's	1.2
InSeta	.6
Mitchell's Formal Wear	.6
Desmond's Formalwear	.6
Total	100.0

TABLE 20. MEN'S AND WOMEN'S FASHIONS

	Percent
Old Navy	22.2
Burlington Coat Factory Warehouse	10.0
Eddie Bauer	8.9
Abercrombie and Fitch	6.7
Levi's	5.6
American Eagle	5.6
Gap	5.6
Banana Republic	5.0
Tommy Hilfiger	3.3
L.L. Bean	3.3
Benetton	2.8
Gadzooks	2.2
J. Crew	2.2
Urban Outfitters	1.7
Big Dog	1.7
Guess	1.7
Hot Topic	1.7
Aeropostale	1.7
Land's End	1.7
Polo Ralph Lauren	1.1
Wilson's Leather	1.1
The Buckle	1.1
Underground Station	.6
Zumiez	.6
Timberland	.6
London Fog	.6
d.e.m.o.	.6
Pacific Sunwear	.6
Total	100.0

TABLE 21. SHOES

	Percent
Payless ShoeSource	26.9
Foot Locker	11.9
Famous Footwear	10.3
DSW Shoe Warehouse	7.1
Nine West	6.3
Timberland	4.3
Vans	4.0
Bakers	3.2
Nike	3.2
Journeys	2.8
Rockport Shoes	2.4
Naturalizer	2.4
Finish Line	2.0
Kenneth Cole	2.0
The Athlete's Foot	2.0
The Walking Company	1.6
Footaction USA	1.6
Johnston & Murphy	1.2
Hush Puppies Shoes	1.2
Stride Rite	1.2
Steve Madden	1.2
Aerosoles	1.2
Sam & Libby	.4
Total	100.0

TABLE 22. SPECIALTY STORES

	Percent
Dollar Tree	15.1
The Disney Store	13.6
PetsMart	9.7
Discovery Channel Store	9.0
Sharper Image	9.0
The Museum Company	6.8
Wicks'n'Sticks	6.1
LensCrafters	3.9
Petland	3.2
Build-a-Bear Workshop	3.2
Glamour Shots	2.5
The Picture People	2.5
Vans Skatepark Pro	2.2
EyeMasters	2.2
Department 56	1.4
United Parcel Service	1.4
Tinder Box	1.4
Sunglass Hut	1.1
Bag'n Baggage	1.1
Pearle Vision	1.1
US Postal Service	1.1
Remington Shavers & Knives	.7
Cost Cutters	.7
FedEx	.7
Eyeglass Emporium	.4
Total	100.0

TABLE 23. SPORTING GOODS/ACTIVEWEAR

	Percent
Champs Sports	22.2
Bass Pro Shops	18.0
Champ's	10.8
Gaylan's Trading	9.3
North Face	9.3
Patagonia	8.8
Swim'n Sport	8.2
Hibbett Sports	7.2
Rave	3.1
BC Surf & Sport	3.1
Total	100.0

TABLE 24. TOYS

	Percent
Toys "R" Us	47.4
F.A.O. Schwarz	24.9
KB Toys	21.1
Babies "R" Us	3.3
I Dream of Beanie	3.3
Total	100.0

TABLE 25. WOMEN'S FASHIONS

	Percent
Victoria's Secret	19.2
Casual Corner	11.5
The Limited	7.3
Express	6.9
Frederick's of Hollywood	6.9
Dress Barn	6.2
Lerner New York	6.2
Charlotte Russe	3.8
Ann Taylor	3.5
Wet Seal	3.1
Contempo Casuals	3.1
Motherhood Maternity	2.7
Liz Claiborne	2.7
August Max Woman	2.3
bebe	1.9
Petite Sophisticate	1.9
Everything But Water	1.9
Talbots	1.5
Esprit	1.5
5-7-9-Shop	1.5
Christopher & Banks	1.2
Laura Ashley	1.2
Cache	.8
Arden B.	.8
J. Jill	.4
Total	100.0