

EFFECTS OF ZONAL MERCHANDISING ON SALES PRODUCTIVITY OF MALLS

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Overview

The shopping environment is evolving. Due to changes in individuals' lives, the mode of shopping activity for many appears to be transforming. Specifically, with increasing time poverty, many individuals are finding that they do not possess the time to spend in shopping activities as they once did. Instead of leisurely shopping trips where browsing activity may have dominated, shopping trips are much more likely to be quick, purpose-driven endeavors. As a result of these changes, many individuals are finding that category killers and power centers satisfy their needs better than regional shopping malls. The purpose of this study is to examine zonal merchandising as a possible strategy for use by suburban regional shopping malls as a way to regain some of the business lost to category killers and power centers.



■ Background

No single institution better embodies the consumer culture of post-World War II United States than does the suburban regional shopping mall.

In the contemporary world, the signifying and celebrating edifice of consumer culture has become the shopping mall which exists in pseudo-democratic twilight zone between reality and a commercially produced fantasy world of commodified goods, images and leisure activities that gratify transformed desire and provide packaged self-images to a distinctive form of subjectivity (Langman, 1992, p. 40).

The suburban regional shopping mall replaced the city center, not only as the dominant center of retail activity, but in many instances, as the center of social and cultural activities. The suburban regional shopping mall became so successful that “today no significant pocket of the population is out of reach of a regional, or in many cases a giant super-regional mall” (Laing, 1992, p. 20). Kowinsky (1985) claimed that in the U.S., there are more enclosed malls than cities, four-year colleges or television stations. Indeed, Charles Kuralt once stated “if you want to find America today, this (the regional shopping mall) is where you have to look” (Kowinski, 1985, p. 17).

Only approximately 40 years after the opening of the first enclosed, multi-anchor regional shopping mall in suburban Minneapolis, however, serious questions are being raised concerning the future of this institution. Consumers are facing an unprecedented number of shopping alternatives. Indeed, retail space per capita (at nearly 19 square feet) is more than twice what it was 20 years ago (*5 Down and 5 To Go*, 1995; Berner, 1996) and has increased by a third in just the last 10 years (Barrett, 1997). Although much of this new retail space is located in new shopping centers, most of these new shopping centers are open-air, primarily power centers—negligible growth has occurred in the number of suburban regional shopping malls. Faced with the growing number of shopping alternatives, consumers are increasingly choosing to shop at stores located outside of suburban regional shopping malls. As a result, mall sales per square foot has declined 17% between 1978 and 1992 (*The Economist*, 1992), and 13% between just 1986 and 1992 (Rudnitsky, 1992). It appears that America’s fascination with the suburban regional shopping mall may have come to an end (Barrett, 1997). Consequently, choice of shopping destination is a topic that is receiving increasing attention from practitioners and researchers alike.

It has been suggested by some (e.g., Shoulberg, 1998) that the

competitive problems being experienced by suburban regional shopping centers are in part due to store layout problems caused by changing consumer lifestyles and shopping habits. The purpose of this paper is to explore this contention. Specifically, the concept of zonal merchandising is examined as a means through which suburban regional shopping malls may be able to regain a competitive advantage over some of their competitors.

■ The Suburban Regional Shopping Mall at the Turn of the Century

As we approach the end of the century, the position of the suburban regional shopping mall as a social and retail entity is only a shadow of what it was a few decades earlier. At one time, the suburban regional shopping center was heralded as the “new Main Street” of the consumer culture (Barrett, 1997). Increasing amounts of data seem to indicate that the golden days of the regional shopping malls may be drawing to an end.

If you were to have taken a helicopter ride over America's leading suburbs a decade ago and taken another today, you could make a remarkable comparison. As late as a decade ago, we were witnessing the end of the Golden Age of the department-store dominated shopping malls, traffic would be swarming around the access roads to those malls as if they were the meccas of the retail world.

Today's view wouldn't show new developments, but it would show that traffic is booming around what was then called strip shopping malls—once the lowly cousin to the glamorous 4-5 anchor galleries, (Kenzer, 1998).

For instance, the number of vacancies in regional shopping malls are increasing (close to 12% [*The Economist*, 1992]) as are the delinquency rates on regional shopping mall mortgages (Laing, 1992). While most real estate categories have appreciated, many shopping malls have lost 10 to 15% of their market value in only two years (Martin, 1997).

Consumers appear to be changing the way that they shop at suburban regional shopping malls. For instance, a survey by the Chicago research firm MAS observed a significant change in mall shopping activity during the 1980s. They observed that consumers are making over one-third fewer trips to suburban regional shopping malls (2.0 times per month in 1990 as opposed to 3.1 in 1980), are visiting one-half as many stores per trip (3.5 stores in 1990 as opposed to 7.0 in 1980), and are spending only one-third the amount of time in the mall (4 hours per

month in 1990 as opposed to 12 hours in 1980) (Laing, 1992). These trends have continued in the 1990s (Gallun, 1996; Miller, 1997). Furthermore, the percentage of Americans who stated that they shop at suburban regional shopping malls very often declined by nearly 40% from 1987 to 1994, and the percentage who stated that they do not shop at suburban regional shopping malls doubled during the same time period—from 12 to 24% (Cavanaugh, 1996). Although not all studies have observed such a sharp decline in shopping activity at suburban regional shopping malls, the trend is the same—Americans are shopping less at suburban regional shopping malls today than before. The magic of the “build it and they will come” philosophy has seemingly come to an end.

The managements of several suburban regional shopping malls have turned to entertainment as a panacea for ills being experienced in the industry, sometimes with successful results. For instance, Laurence Siegel, Chairman and CEO of the Mills Corporation, has stated: “Increasingly, we built on our realization that people do not go out just for the function of shopping; they want to be entertained. . . . We think of ourselves as creating dynamic places to which people are drawn because they want to be stimulated” (Siegel, 1997).

Although the infusion of entertainment opportunities into suburban regional shopping malls has proven to be very successful in many instances, it does not appear to be the big draw at all regional shopping malls that many had expected or hoped for. According to the 1996 *National Benchmarks of Shopping Patterns* from Stillerman Jones & Company, only four percent of shoppers aged 15 and older said they visited the mall for entertainment reasons as opposed to 11% in 1990. The 1998 *National Benchmarks of Shopping Patterns* no longer reported entertainment reasons as a separate reason for the primary purpose of shopping visit. More than half of shoppers, however, said they go to the mall with a specific destination store or product in mind in 1998, up from 45% in 1990.

These trends are not necessarily bad. For instance, 52% of combined store visits to suburban regional shopping malls resulted in a purchase in 1995, up from 48% in 1990. The trends signal that, at least for many customers, shopping remains a primary reason for mall visitation. Furthermore, the trends suggest that customers may be becoming increasingly purpose-directed in their shopping activities. The increasing purpose directedness observed in consumer shopping activity is likely an outgrowth of changing consumer lifestyles which have in turn, affected consumers’ shopping orientation.

The American population has undergone a number of fundamental changes which have directly affected their shopping activity. The aging of the population (Turchiano, 1990), increasing time pressures (Schultz, 1992), lessening emphasis on fashion (Roper, 1992) and increasing value

consciousness (Schultz et al, 1993) are all trends that bode ill for the future of regional shopping centers as they are presently located and configured. Of these trends, increasing time pressures appear to have the most potential to affect adversely the success of suburban regional shopping malls.

Growing Time Pressures

The change in consumers that likely has the greatest potential for the decline in the relative importance of suburban regional shopping malls is a change in lifestyle. A key quality of the consumer culture is a lack of time—a consumer culture is temporally impoverished (Needleman, 1991). Individuals are finding that they possess less and less free time. A major source of this loss of free time is the increasing amount of time being spent at work. Over the last 30 years, for instance, the amount of time spent by Americans working has risen steadily (Schor, 1991). When the increased time spent at work is viewed for a typical family, the increase is even greater—the increased percentage of women and children in the job market has led to an explosion of total time invested in work activities by members of a typical family.

It has been argued that our consumer culture must be time-poor. (This condition is interesting to note, given that some of the primary benefits thought to be produced by a life of affluence are tranquillity and rest [Linder, 1970].) Given that products and their acquisition are viewed as the primary goal in life in a consumer culture, most individuals' efforts are typically directed toward wealth-generating activities (e.g., employment) or product acquisition at the expense of other pursuits such as leisure or social interaction. Given that the U.S. is the most consumer-oriented society in history (Schor, 1991), it is logical to expect that the U.S. would suffer from time scarcity. Since the importance of consumption in the society appears to be increasing still (Schor, 1991), it is further logical to expect that time pressures will continue to increase.

In a very real sense, in a terrifyingly real sense, our lives have been growing shorter and shorter, even as medical science finds even more ingenious ways of prolonging our biological or animal time. . . . [Indeed,] even when we are not busy, we are often driven by envy of those who are busy (Needleman, 1991, pp. 29–30, 32–33).

We have become a "harried" leisure and working class, frustrated by the demands of consumption on our time and obliged to labour more than we would like to earn the means to consume (Cross, 1993, p.1).

"Non-working spouses, who used to have time to shop, have joined the labor force. Today, time is at a premium for many working couples who

would rather spend it somewhere other than a shopping mall” (Gallun, 1996, p. 2).

Clearly, customers increasingly are time-poor (Schor, 1998). Most individuals no longer have the large chunks of free time needed to spend long periods of time in shopping activities (Cross, 1993). Instead of “shopping ‘til they drop,” consumers are more often searching for shopping alternatives which will allow them to acquire their needed products quickly and easily. Since customers can often find the best selections of products most conveniently at category killers and other stores not commonly found in most suburban regional shopping malls, many have shifted their buying habits accordingly (Shoulberg, 1998).

As would be expected, consumers are becoming more and more interested in more convenient, less time-consuming forms of shopping than are found at suburban regional shopping malls (Edwards and Ryan, 1998). As a result, Alan Millstein, chairman of the Fashion Network observed, “One of the deep, dark secrets of mall developers is the decrease in traffic during midweek” (Barrett, 1997). It should be noted that although some (e.g., Schwartz, 1986) believed the time pressures experienced by consumers would be a temporary phenomenon, time has proven them wrong.

Comparison Shopping

A problem often encountered by consumers shopping at locations outside of suburban regional shopping malls, however, is the inconvenience of comparison shopping between stores. Consumers shopping at stores outside of a suburban regional shopping mall often find that they must drive between locations if they are to engage in comparison shopping. This is a serious concern, since most customers prefer to shop at several stores before making a purchasing decision (Shoulberg, 1998), and it may present an area of opportunity to suburban regional shopping malls.

Historically, a primary key to the success of suburban regional shopping malls was the ability of consumers to comparison shop conveniently between a number of retailers. Indeed, the suburban regional shopping mall was developed as a place where shopping could be viewed as a leisure activity (Marks, 1998). There was minimal concern for convenience and efficiency—customers were expected to spend large amounts of time in the center during their shopping trip. Although suburban regional shopping malls still present a seemingly conducive environment for comparison shopping, it is not as attractive to consumers as it once was. Although comparison shopping can still take place in suburban regional shopping centers without the need to drive between stores or to

encounter the environment in doing so, the size of many suburban regional shopping centers and the distances between stores often makes comparison shopping less desirable today. Walking distances upwards to a quarter-mile between stores is not within most individuals' definition of convenience. Feinberg states "most malls are so large, consumers feel like rats caught in a maze of aisles, hallways and stores" (Herr, 1996).

Consumers are finding it more difficult to shop at the regional shopping mall. Instead, shoppers want to run out at lunch or make a quick stop on their way home from work. According to a recent study by WSL Strategic Retail, a New York Consulting firm, 61% of the respondents said convenience was the most important reason why they choose to shop at a certain store (Edwards and Ryan, 1998, p. 1).

The layout of most regional shopping malls is configured to ensure that consumers will be exposed to the maximum number of stores to maximize customer interchange. Placement of similar stores at opposite ends of the shopping mall, exposes the customer to the other store offerings of the mall as well, with the well-founded hope that the consumer will be attracted into these stores for impulse shopping. Although this form of layout is successful in fostering increased customer interchange, it may also be less than successful in appealing to today's time-pressured consumer. A consumer desiring to purchase a new pair of shoes, for instance, may find that the experience of visiting the shoe stores located in a typical regional shopping mall may require visiting every level and every wing of the shopping mall. In other words, to shop for one product, the consumer may be forced to traverse the entire mall. Instead of taking the time to do so, the consumer may be tempted merely to visit a shoe superstore located outside of the mall instead. Furthermore, if the consumer does traverse the entire mall to shop for shoes, there may be little time left to attempt any additional shopping at the mall during that shopping trip.

In a study of the patronage patterns of England's Metrocentre, the largest out-of-town (suburban) regional shopping mall in Europe, McGoldrick and Thompson (1992) observed that the top three determinants of customer patronage were 1) travel time to the center, 2) the presence of a particular store, and 3) ease, a factor that included layout. They also observed that the top two determinants of frequency of visit were 1) travel time to the center, and 2) ease, a factor that included layout; that the top three determinants of duration of visit were 1) travel time to the center, 2) recreational experience at the center, and 3) ease, a factor that included layout; and finally, that the top three determinants of expenditure were 1) travel time to the center, 2) prices, and 3) ease, a factor that included layout. They also observed that of the 27 factors examined, layout ranked

fifth in importance based on correlation with overall image, behind factors which represented matter-of-fact or “touchy-feely” issues and ahead of all other actionable issues. (The four top-ranked factors were 1) a place to spend a few hours, 2) a place to go when the weather is bad, 3) an “in-place” to go, and 4) friendliness of atmosphere). It appears that convenience of location and of layout may be issues of great concern to consumers. A possible way to increase the convenience of shopping within a suburban regional shopping mall is the use of zonal merchandising.

■ Zonal Merchandising

Zonal merchandising seemingly represents a revolutionary approach to store layout within suburban regional shopping malls. The focus of zonal merchandising is not on providing customers with an atmosphere conducive to foster leisure shopping, nor on enticing them to walk past each retailer located in the center. Instead, the objective of zonal merchandising is on shopping convenience. In zonal merchandising, tenants are arranged in a layout convenient to customers, allowing customers to shop at a number of stores carrying similar merchandise without being forced to traverse the entire length of the center.

At a few suburban regional shopping malls, shopping center managers/developers have begun to test this contention by opening suburban regional shopping malls which at least attempt to implement a form of zonal merchandising based on customer profile and/or product type. Two such centers are the Palisades Center in Rockland County, NY, and Park Meadows outside of Denver, CO. Although the Park Meadows layout does not represent a strict interpretation of zonal merchandising (note, for instance, the Alcatraz Brewing Company in the family section), there are definite clusters of similar stores which one would not ordinarily find in a typical suburban regional shopping mall. For example, many of the home furnishings stores (e.g., Crate & Barrel, Pottery Barn, Restoration Hardware, Williams-Sonoma) are grouped in one wing.

Although such arrangements of similar retailers may at first appear unusual, it is based on the same principle that led to the clustering of food outlets into a food court (Shoulberg, 1998). The food court has acted not to raise competition between the similar outlets, but to create greater traffic-generating qualities. In fact, most food tenants have experienced a much greater level of success when located in food courts than when they were spread across the center. The magnitude of the traffic-generating qualities is such that food courts serve as anchors in many suburban regional shopping malls today. Interlagos, a shopping mall in Sao Paulo, Brazil, experienced similar results with shoe retailers. Although the origi-

nal tenant plan called for seven or eight shoe stores, the center quickly found itself with over 20 shoe retailers. When center management attempted to reduce this number, they were met by resistance by the shoe retailers. The success experienced by the shoe stores was much more than anticipated due to the effects of cumulative attraction—the center was viewed as a destination for shoes.

Similarly at Rio Sul, a shopping mall in Rio de Janeiro, zonal merchandising was employed in the home furnishings category, where 35 stores selling home furnishings were grouped together. The success of the grouping of home furnishings retailers was beyond all expectations—actually prompting the development of two shopping centers in Rio de Janeiro (including Casa Center) which focus entirely on home furnishings. The Fashion Mall, another regional shopping mall in Rio de Janeiro, developed a grouping of baby and infant-oriented stores in an area outside of the center's primary traffic pattern—a grouping which is also experiencing a significant level of success. The success of these initial ventures into zonal merchandising will likely lead to more comprehensive undertakings in the Brazilian market.

In conclusion, layouts of suburban regional shopping centers based on zonal merchandising readily cater to the time-starved lives experienced by many consumers (Shoulberg, 1998). Such layouts permit consumers who are aware of their needs to visit the stores most likely to carry the product quickly and efficiently, without forcing them to traverse the entire mall. This is an important issue, because it may present a way for suburban regional shopping malls to regain some of the customers lost to category killers and to retailers located in power centers.

The use of zonal merchandising, however, could signal a fundamental shift in the shopping behaviors of customers in suburban regional shopping malls.

Here's the down side of this deal (zonal merchandising) as I see it. One of the beauties of the mall shopping experience has always been that the shopper has usually come to the mall with a specific purchase in mind. On her way to or from that store, or types of stores, she passes an entire retailing universe of other stores selling her other products. Maybe she wanted dress shoes, but ends up buying a necklace, some lipstick and, even perchance, a new set of towels.

Now, if she goes to the mall to buy those shoes, she parks near the shoe neighborhood, visits only that part of the mall and hightails it out of there . . . in the process, missing the jewelry stores, the makeup shops and missing all of those home stores. The very essence of what made the shopping center such a rich experience is in jeopardy of being destroyed.

It's a trade-off, as most things in life are (Shoulberg, 1998, p. 16).

Furthermore, if a suburban regional shopping mall should employ zonal merchandising, attention will need to be placed on maintaining such an arrangement. Shopping mall managers could no longer be merely content to sign any interested tenants to any available store fronts. Instead, leasing would need to be based on the maintenance of the zonal arrangement.

One of the primary hindrances to the implementation of zonal merchandising is the managers and developers of suburban regional shopping centers themselves. Zonal merchandising represents a fundamental shift in leasing. The hesitancy which many managers and developers have in even considering the idea is an important issue. Instead of asking whether zonal merchandising may have value to their properties, the more common response from mall managers is "that is not the way things are done." Many past revolutions in suburban regional shopping centers, however, were initially greeted in the same fashion (e.g., having two or more department stores located under the same roof).

Initial attempts at zonal merchandising have provided very positive results. In each instance, sales at the center either rose or exceeded expectations. This level of success would appear to indicate that the time has come for a total, full-fledged implementation of zonal merchandising in a suburban regional shopping mall.

■ Conclusion

Zonal merchandising appears to have the potential to be a successful layout alternative in suburban regional shopping malls as is indicated by the success observed in Brazil, and the success experienced by food courts in the U.S. To explore receptivity to the concept of zonal merchandising, three studies were conducted.

For the purposes of this study, product-based zonal merchandising was defined as the clustering together of stores in a mall that sell similar merchandise (e.g., all the shoe stores in the same area). Lifestyle-based zonal merchandising was defined as the clustering together of stores in a mall that sell merchandise appealing to a specific lifestyle group (e.g., all of the children's clothing, toys, and shoe stores in the same area).

Study One Methodology

Study One was comprised of two focus groups, and an intercept survey that had people sort stores in a fictional mall with only the anchors labeled.

Focus Groups

Two focus groups, one male and one female, were conducted. The focus groups probed for individuals' current attitudes towards shopping in general and shopping in malls specifically. The groups were then asked to react to both the product-based and lifestyle-based zonal merchandising concepts of organizing the mall. In general, both the males and females liked the idea of clustering stores by type because of the speed with which they could shop, the knowledge of where the products that they want would be located in the mall, and their ability to comparison shop. Since each person had a different lifestyle group in the focus groups, they could only react to the question of all their favorite stores being in the same area in the mall. Everyone in the focus groups felt that this clustering of favorite stores would add to their convenience.

Survey

Interviewers used a convenience sample to administer a questionnaire via personal interviews. The interviewers were asked to recruit an equal number of male and female subjects. The resulting sample was 91 male respondents and 95 female respondents.

The respondents were asked to report their shopping behavior at malls. Specifically, they were asked to rate their reasons for visiting a mall and indicate how often they visit the mall, how long they usually spend at the mall, and an estimate of how much they usually spend at the mall. The respondents were then presented with a diagram of a hypothetical mall with four anchors identified (Nordstrom, Kaufmann's, JCPenney, and K-Mart). They were asked to sort 32 stores where they would like them to be in this hypothetical mall layout. The stores were chosen to represent eight categories, with high-priced stores, mid-priced stores, and low-priced stores in each category. The categorization was not communicated in any way to the respondents. The interviewers judged whether the respondent sorted the stores by product type, by lifestyle, or in some other manner. The respondents were then asked to rate why they placed the stores in the manner that they did on mall-shopping characteristics. After that, they were asked to indicate if they would still visit all four wings of the mall, given how they organized it, and whether or not their layout would increase, decrease or not affect their number of visits, the amount spent, the time spent, and the product categories bought at the mall. Finally, classification data were gathered.

Survey Results

Table 1 presents the means of the male and female respondents for their reasons for visiting the mall. Male and female responses were separated, since previous studies have shown that male and female shopping behavior and preferences may differ. T-tests were performed to determine if male and female responses differed. Seven-point rating scales were used

TABLE 1. REASONS FOR VISITING MALLS FOR MALE AND FEMALE RESPONDENTS

Reasons for Visiting Mall	Male Mean	Female Mean	t-value	Level of Significance
Purchase items for self or immediate family	6.0330	6.5579	2.70	.008
Purchase gifts for friends or extended family	4.5385	5.4421	3.40	.001
A chance to socialize with friends or family	2.0549	2.6632	2.10	.037
A chance to meet new people	1.4945	1.6632	.85	.198
A chance to meet old friends	1.5824	1.9053	1.46	.221
Participate in events held at the mall	1.5275	1.7684	1.29	.187
Patronize an eating establishment	3.0110	3.1684	.56	.283
Visit with people who work at the stores	1.8571	1.9158	.26	.223

with seven signifying “very characteristic” and one signifying “not at all characteristic.” The items for which significant (at the .05 level) differences were observed are presented in bold. Although the differences were not great, female shoppers appeared to be more likely to visit the mall for social reasons than male shoppers.

Of the total sample, 26.3% visited the mall at least once a week; 41.9% visited the mall at least once a month; 19.4% visited the mall at least once every season; 9.1% visited the mall at least twice a year; 2.7% visited the mall only once a year, and 0.5% (one person) never visited the mall. The average amount of time spent by the respondents was almost two hours (104.276 minutes) with a range of six minutes to 420 minutes. The average amount of money spent at the mall was \$97.47 with a range of \$7.00 to \$1,000.00.

Table 2 presents the mean ratings of the male and female respondents of the importance given to each characteristic when they organized their malls. T-tests were performed to determine if male and female responses differed. Seven-point rating scales were used with seven “signifying very important” and one “signifying not at all important.” The items for which significant (at the .05 level) differences were observed are presented in bold. The results indicated that the respondents viewed convenience as the primary layout concern. (Convenience was most important for the female respondents and second most important for the male respondents.)

The respondents were then asked which wing they would most likely shop the most often. Of the 186 respondents, 31.2% indicated

TABLE 2. RATINGS OF IMPORTANCE OF CHARACTERISTICS FOR MALL ORGANIZATION

Characteristic	Male Mean	Female Mean	t-value	Level of Significance
Convenience	5.6813	6.2000	2.04	.042
Knowing where the stores are	5.3956	6.1474	3.09	.002
Matching of my shopping patterns	4.8132	5.5895	2.64	.009
Comparison shopping	3.5824	4.2947	2.22	.028
Merchandise cost	4.8791	5.3263	1.43	.312
Quality of merchandise	5.8022	6.0421	1.00	.240
Variety of merchandise	5.5385	5.3474	0.72	.265
Service in the stores	4.9451	5.0842	0.44	.315

Nordstrom; 36% indicated Kaufmann's, 18.8% indicated JCPenney, and 14% indicated K-Mart. They were then asked if they would visit each wing. The respondents indicated that 84.9% would visit the Nordstrom wing, 82.8% would visit the Kaufmann's wing; 82.8% would visit the JCPenney wing, and 61.3% would visit the K-Mart wing. Only 22.6% of the respondents indicated that they would never visit one of the wings. Regarding how they sorted the stores, 18.8% of the sample sorted by product type, 53.8% sorted by lifestyle, and 27.4% sorted by some other configuration.

Table 3 presents the percentages of respondents who indicated whether or not their shopping patterns would change as a result of the way that they organized the mall. Although most respondents suggested that their shopping patterns would not change as a result of the new layout, approximately one-third of the respondents anticipated shopping at their sorted mall more often.

TABLE 3. CHANGES IN SHOPPING PATTERNS WITH PERSONAL MALL DESIGN

Shopping Pattern	Increase	Decrease	Remain Same
Frequency of mall visits	33.3%	2.7%	64.0%
Amount of money spent at the mall	33.3%	2.2%	64.5%
Amount of time spent at mall	26.3%	15.1%	58.6%
Types of products bought at mall	30.6%	0%	69.4%

Classification Data

The majority of the sample (87.1%) was between the ages of 18 and 49. In terms of education, 21.5% had a high school degree; 40.3% had some

college; 30.6% were college graduates or had postgraduate work; 4.8% had some high school, and 2.7% had vocational training. In terms of occupation, 17.2% classified themselves as professional; 12.4% were executive/administrative; 21% were clerical/sales/technical; 5.9% were precision/crafts/repair; 4.3% were retired, and 10.2% were unemployed. Twenty-nine percent of the respondents classified themselves as other. The average number of people in the households was 3.258. In terms of household income, 5.9% earned less than \$10,000; 17.7% earned between \$10,000 and \$29,999; 19.9% earned between \$30,000 and \$49,999; 18.8% earned between \$50,000 and \$75,000, and 18.8% earned over \$75,000. 18.8% refused to answer the question.

Discussion

Both males and females were observed to be most likely to shop at a mall for themselves or for family and friends. Regarding zonal merchandising, most of the respondents sorted the stores by lifestyle; however, even though they tended to group their favorite stores in one or two wings, they indicated that they would visit the other wings in the mall. The majority indicated that their mall behavior would not change as a result of being able to organize the stores in the way they wanted.

Limitations

From observing the respondents as they placed the 32 stores into hypothetical mall layout, and from examining the results, it appeared that the anchor stores used in the hypothetical mall layout may have biased their layouts. Specifically, the respondents tended to cluster their favorite stores near to Nordstrom and Kaufmann's (which tended to be the respondents' preferred anchor stores). Furthermore, several of the respondents indicated that they could not place stores selling similar merchandise next to each other since a mall would never permit that arrangement. (This phenomenon occurred even though respondents were assured that they could arrange the mall any way that they wanted.) Additional concerns arose given the mix of the 32 stores which they were to arrange. Several respondents were not familiar with some of the stores (e.g., Sharper Image, Crate & Barrel). Also, some respondents felt that they could not develop a desired layout since some of their favorite stores (e.g. Victoria's Secret, The Gap) were not included. These limitations indicated that another study was necessary.

Study Two

Focus Groups

Given the results from the first study, two additional focus groups were conducted. This time, the participants were not separated based on gender. Age seemed to have a lot to do with how the groups reacted to the

zonal concept. One woman indicated that the zonal concept would help her since she usually shops with children, and they have a finite tolerance for shopping. Single people preferred the malls as they exist because they enjoy walking the mall and checking out sales. One person said that a mall in Cincinnati (Forest Fair) was zoned by lifestyle and what we were talking about was nothing new.

Survey

The second study followed the same procedure as the first except that the mall anchors were not labeled. In the second study, the respondents were given the option of placing their favorite stores in whatever wing they wanted. They were also provided with descriptions of the 32 stores that they placed. Changes were also made in the list of reasons for mall visit behavior based on response frequencies to the open-ended question in the first study. The resulting sample size was 156.

Results

Table 4 presents the means of their reasons for visiting the mall using whether or not anchor labels were present as groupings (the ratings gathered in Study One compared with the ratings gathered in Study Two). T-tests were performed to determine if differences existed between the two groups. Seven-point rating scales were used with seven signifying "very characteristic" and one signifying "not at all characteristic." No significant differences were observed. The means for the two added questions were 3.9744 on a seven-point scale of checking out items that are on sale as a reason for going to the mall, and 1.4615 of participating in an exercise program as a reason for going to the mall.

TABLE 4. REASONS FOR VISITING THE MALL

Reasons for Visiting Mall	Anchor Labels	No Anchor Labels	t-value	Level of Significance
Purchase items for self or immediate family	6.3011	6.4487	1.09	.275
Purchase gifts for friends or extended family	4.000	5.2436	1.29	.198
A chance to socialize with friends or family	2.3656	2.2628	0.53	.597
Participate in events held at the mall	1.6505	1.6923	0.30	.764
Patronize an eating establishment	3.0914	2.8718	1.08	.280
Visit with people who work at the stores	1.8871	2.2115	1.84	.066

Table 5 presents the mean ratings of the importance given to each characteristic by respondents in the two groups for how they organized their malls. T-tests were performed to determine if differences existed between the responses of the two groups. Seven-point rating scales were used with seven signifying "very important" and one signifying "not at all important." The items for which significant (at the 0.05 level) differences were observed are presented in bold.

When the anchor stores were labeled, the respondents placed more importance on quality and service issues, whereas when the anchor stores were not labeled, the respondents placed more importance on matching the layout to their shopping patterns, facilitating comparison shopping and convenience.

TABLE 5. RATINGS OF IMPORTANCE OF CHARACTERISTICS FOR MALL ORGANIZATION

Characteristic	Anchors		t-value	Level of Significance
	Anchors Labeled	Not Labeled		
Convenience	5.9462	6.3141	1.46	.145
Knowing where the stores are	5.7796	5.8590	0.43	.668
Matching of my shopping patterns	5.2097	5.6795	2.35	.019
Comparison shopping	3.9462	4.3846	1.87	.062
Merchandise cost	5.1075	3.5641	6.88	.000
Quality of merchandise	5.9247	4.4808	7.10	.000
Variety of merchandise	5.4409	5.2821	0.80	.424
Service in the stores	5.0161	3.7564	5.27	.000

Table 6 presents the percentages of respondents who indicated whether or not their shopping patterns would change as a result of the way that they organized the mall without the anchors labeled. These figures change little from the first study in which the anchors were labeled.

TABLE 6. CHANGES IN SHOPPING PATTERNS WITH PERSONAL MALL DESIGN

Shopping Pattern	Increase	Decrease	Remain Same
Frequency of mall visits	39.1%	3.8%	56.4%
Amount of money spent at the mall	43.6%	3.8%	52.6%
Amount of time spent at mall	27.6%	28.8%	43.6%
Types of products bought at mall	25.6%	3.2%	71.2%

Table 7 presents the mean convenience rating for whether or not mall anchors were labeled and how respondents' layouts were classified (product type, lifestyle, or other). The results of an ANOVA indicated an f value of 2.325 with marginal significance ($p=0.075$). The respondents who placed stores on the mall layout without anchors labeled consistently rated their layouts as more convenient than those respondents who placed stores on the mall layout with anchors labeled. Similar results were observed when the ratings on whether the layout matched one's shopping patterns (Table 8) ($f=5.12$, $p=0.002$), and when ratings of the importance of comparison shopping were observed (Table 9) ($f=5.822$, $p=0.001$).

TABLE 7. MEANS OF CONVENIENCE RATINGS BY ANCHOR LABEL PRESENCE AND TYPE OF SORTING

	Product Type	Lifestyle	Other
Anchors labeled	6.43	5.93	5.65
Anchors not labeled	6.68	6.23	5.97

TABLE 8. MEANS OF MATCHING ONE'S SHOPPING PATTERN RATINGS BY ANCHOR LABEL PRESENCE AND TYPE OF SORTING

	Product Type	Lifestyle	Other
Anchors labeled	5.14	5.49	4.71
Anchors not labeled	5.98	5.76	5.03

TABLE 9. MEANS OF COMPARISON SHOPPING RATINGS BY ANCHOR LABEL PRESENCE AND TYPE OF SORTING

	Product Type	Lifestyle	Other
Anchors labeled	6.43	5.93	5.65
Anchors not labeled	6.68	6.23	5.97

Finally, ANOVAs were also conducted for respondents ratings of merchandise cost, quality, value, and service in the stores. (See Tables 10 through 13.) Significant (0.05 level) differences were observed in each test. In most instances, respondents who placed stores on the hypothetical mall layout with anchor labels reported higher ratings on each factor than those respondents who placed the stores on the hypothetical mall layout without anchor labels. The only exception involved the ratings of variety for respondents who placed their stores in a layout judged as lifestyle.

These findings seem to indicate that having the anchor stores labeled may affect individuals' evaluation of the offerings of that mall (halo effect).

TABLE 10. MEANS OF MERCHANDISE COST RATINGS BY ANCHOR LABEL PRESENCE AND TYPE OF SORTING

	Product Type	Lifestyle	Other
Anchors labeled	5.14	5.32	4.67
Anchors not labeled	3.74	3.72	2.90

TABLE 11. MEANS OF MERCHANDISE QUALITY RATINGS BY ANCHOR LABEL PRESENCE AND TYPE OF SORTING

	Product Type	Lifestyle	Other
Anchors labeled	6.09	5.93	5.80
Anchors not labeled	4.15	5.04	3.58

TABLE 12. MEANS OF MERCHANDISE VARIETY RATINGS BY ANCHOR LABEL PRESENCE AND TYPE OF SORTING

	Product Type	Lifestyle	Other
Anchors labeled	5.00	5.38	5.86
Anchors not labeled	4.57	5.67	5.39

TABLE 13. MEANS OF SERVICE IN STORES RATINGS BY ANCHOR LABEL PRESENCE AND TYPE OF SORTING

	Product Type	Lifestyle	Other
Anchors labeled	4.57	4.73	5.88
Anchors not labeled	3.45	4.05	3.48

Classification Data

The demographics of the second sample are as follows: 65.4% of them were between the ages of 18 to 34; 22.4% were 35 to 49 years of age; 7.7% were 50 to 64 years of age, and 4.5% were 65 years of age or older. As for education, 3.2% had some high school; 14.7% were high school graduates; 5.8% had vocational training; 52.6% had some college; 19.9% were college graduates; and 3.8% had postgraduate work. For occupation, 14.1% characterized themselves as professionals; 14.7% were executive/administration; 17.3% were clerical/sales/technicians; 3.2% were precision/crafts/repair; 7.1% were retired; 1.9% were unemployed; 36.5% were

students, and 5.1% fell in the "other" category. In terms of employment, 58.3% worked full time and 32.1% worked part time while 9.6% did not work. For household income 11.5% earned less than \$10,000; 17.3% earned \$10–29,999; 16% earned \$30–49,999; 18.6% earned \$50–75,000, and 13.5% earned over \$75,000. Among the sample 23.1% refused to answer this question.

Discussion

While the two samples did not differ in terms of the perceptions of their current mall behavior, the presence of anchor labels seemed to have an impact on the subjects' perceptions of the mall's offerings. More important to this study is that respondents who placed their stores based on a product type approach gave a higher level of importance to convenience and the ability to comparison shop. Respondents who placed the stores by either product type or lifestyle gave a higher level of importance to convenience, ability to comparison shop, and whether or not the layout matched their shopping patterns than did those respondents who were judged to use a different basis for placing their stores.

With this background, the foundation has been set for the final study setting in an existing mall.

Study Three

The purpose of the third study is to examine the attitudes of customers of an existing suburban regional shopping mall on remerchandising the center to reflect product- and lifestyle-based zonal merchandising layout approaches.

Potential subjects were contacted via intercept interview at a large, suburban regional shopping mall and were screened on whether or not the mall was one of their favorite places to shop, if they worked at a store in the mall, or if they worked for a marketing research firm. Qualified subjects were questioned on their reasons for visiting the mall and their usual shopping activity. They were then shown the existing layout of the mall and were questioned about their planned shopping activities.

Subjects were then introduced to a revised layout of the mall developed to depict either a product-based zonal merchandising approach or a lifestyle-based zonal merchandising approach. Each subject was exposed to only one of the revised layouts. Subjects were asked to rate the attractiveness of the revised layout and to indicate the extent to which they believed that the revised layout would affect their shopping behavior.

Results

The sample comprised 215 individuals: 108 were presented with the revised layout depicting a product-based zonal merchandising approach and 107 were presented with the revised layout depicting a lifestyle-based

zonal merchandising approach. The sample consisted of 106 males and 109 females.

The reasons given by respondents for visiting the center were varied. Specifically, 67% were planning to buy something for themselves; 68.4% were planning to buy something for an immediate family member; 41.4% were planning to buy something for a friend or extended family member; 65.1% were assessing the current sales; 41.4% were window shopping; 13.5% were there to exercise; 16.7% were there to socialize with friends; 4.7% were there to participate in a mall activity, and 23.7% were planning to patronize an eating establishment. The percentages do not sum to 100% since several respondents were visiting the mall for multiple reasons.

The respondents were shown a diagram of the existing mall and asked where they planned on shopping during this visit. The results were that 63.7% were planning on shopping in the JCPenney wing; 86.5% in the Kaufmann area; 55.8% in the Dillard area, and 48.4% in the Sears wing. No one in the sample indicated that they never shop in the four areas. Only two members of the sample had shopped at another location before coming to the mall. After shopping at the mall, 22 respondents planned on shopping elsewhere, primarily supermarkets, mass merchandisers, and category-killing, specialty stores. As for where they parked, 31.6% indicated the JCPenney wing, 44.2% the Kaufmann area, 15.3% the Dillard area, and 8.8% the Sears wing.

The majority of the subjects indicated that they were frequent visitors to the mall, with 68.8% visiting the mall at least once a week, 20.5% at least once every two weeks, 8.4% at least once a month and 2.3% at least every three months. The average time spent by subjects at the mall was 201 minutes and the average amount of money spent during this visit was nearly \$64.

Zonal Merchandising

The subjects were presented with the layout of the mall revised to reflect either the product-based zonal merchandising layout or the lifestyle-based zonal merchandising layout. The interviewer indicated to the subjects how the stores were reorganized from the mall's existing layout. The subjects were then asked to indicate their level of agreement with attitude statements about the new layout with which they were presented. T-tests were conducted to determine whether differences existed in the ratings given the two zonal-merchandised layouts. The results are presented in Table 14 with significant (at the 0.05 level) differences in bold. The subjects rated the product-based layout as significantly more positive than the lifestyle-based layout for all of the attitude statements.

The subjects were then asked to predict how their shopping behaviors would change given the new layout with which they were presented. The results are shown in Table 15.

TABLE 14. STATEMENTS ABOUT MALL REORGANIZATION

Attitude Statement	Product Layout Mean	Lifestyle Layout Mean	t-value	Level of Significance
I can find what I'm shopping for more easily.	6.5833	5.6355	8.79	.000
I can find a bargain more easily.	6.4352	5.4019	8.84	.000
The stores are harder to find.	1.5648	2.5234	4.82	.000
The organization matches my shopping patterns.	5.7407	5.2336	3.06	.002
It makes it harder for me to shop at this mall.	2.611	3.8224	7.81	.000
It reduces the time I would spend shopping.	2.8426	3.5701	4.84	.000
It increases the distance I walk when I shop.	2.6667	3.8879	8.46	.000
It makes this mall a better place to shop.	6.1667	4.9346	10.78	.000

TABLE 15. SHOPPING BEHAVIOR CHANGES WITH TYPE OF MALL LAYOUT

Shopping Behavior	Mall Layout	Increase	Decrease	Remain the Same
Frequency of visits	Product Layout	69.4%	0.0%	30.6%
	Lifestyle Layout	33.6%	3.7%	62.6%
Amount spent	Product Layout	85.2%	0.0%	14.8%
	Lifestyle Layout	24.3%	2.8%	72.9%
Amount of time spent	Product Layout	38.9%	13.0%	48.1%
	Lifestyle Layout	10.3%	9.3%	80.4%
Types of products bought	Product Layout	9.3%	0.0%	90.7%
	Lifestyle Layout	17.8%	5.6%	76.6%
Number of stores visited	Product Layout	24.1%	4.6%	71.3%
	Lifestyle Layout	36.4%	0.0%	63.6%

A majority of subjects who were presented with the product-based, revised layout believed that they would increase their number of visits to the mall as well as the amount spent at the mall if it possessed a product-based layout. Most of the subjects who were presented with the lifestyle-based, revised layout, however, did not project any changes in their shopping frequency nor the amount that they would spend. Similar results were observed when the responses of male and female subjects were viewed independently. These findings appear to indicate that a product-

based layout may have the potential to increase traffic at this shopping mall as well as total sales. It further indicates that zonal merchandising based on product may possess more promise than zonal merchandising based on consumer lifestyle.

While the subjects presented with the lifestyle-based layout did not anticipate any change in time spent shopping at the mall over the present layout, the subjects presented with the product-based layout did. Specifically, nearly 40% of the subjects presented with the product-based layout perceived that they would spend more time shopping at the mall with this layout. This finding appears to indicate that the product-based layout may be viewed as a more convenient option.

Finally, the majority of subjects did not believe that the alternative layouts would appreciably increase the number of types of products purchased at the mall, although the subjects who were presented with the lifestyle-based layout were more likely to anticipate additional purchases than would be expected. Subjects exposed to both types of revised layouts did anticipate visiting more stores, particularly those subjects exposed to the lifestyle-based layout.

Projected shopping behavior was also examined by age (Table 16), income (Table 17), and gender (Table 18). The results suggest that members of the oldest age category anticipate the greatest change in their shopping behavior. Specifically, the majority of subjects in this age group anticipate shopping and spending more at the center with the zonal merchandising layout.

TABLE 16. SHOPPING BEHAVIOR CHANGES BY AGE

Shopping Behavior	Age Category	Increase	Decrease	Remain the Same
Frequency of visits	<18 to 34	46.3%	5.0%	48.8%
	35 to 49	50.7%	0.0%	49.3%
	50+	59.7%	0.0%	40.3%
Amount spent	<18 to 34	52.5%	3.8%	43.8%
	35 to 49	50.7%	0.0%	49.3%
	50+	62.9%	0.0%	37.1%
Amount of time spent	<18 to 34	26.3%	17.5%	56.3%
	35 to 49	19.2%	9.6%	71.2%
	50+	29.0%	4.8%	66.1%
Types of products bought	<18 to 34	10.0%	5.0%	85.0%
	35 to 49	20.5%	1.4%	78.1%
	50+	9.7%	1.6%	88.7%
Number of stores visited	<18 to 34	16.3%	5.0%	78.8%
	35 to 49	39.7%	1.4%	58.9%
	50+	37.1%	0.0%	62.9%

TABLE 17. SHOPPING BEHAVIOR CHANGES BY INCOME

Shopping Behavior	Income Category	Increase	Decrease	Remain the Same
Frequency of visits	\$0.00 to \$29,999	42.9%	0.0%	57.1%
	\$30,000 to \$49,999	50.9%	1.8%	47.4%
	\$50,000+	54.0%	2.3%	43.7%
Amount spent	\$0.00 to \$29,999	42.9%	0.0%	57.1%
	\$30,000 to \$49,999	55.3%	1.8%	43.0%
	\$50,000+	41.5%	33.3%	39.4%
Amount of time spent	\$0.00 to \$29,999	21.4%	14.3%	64.3%
	\$30,000 to \$49,999	25.4%	12.3%	62.3%
	\$50,000+	24.1%	9.2%	66.7%
Types of products bought	\$0.00 to \$29,999	7.1%	0.0%	92.9%
	\$30,000 to \$49,999	14.9%	2.6%	82.5%
	\$50,000+	12.6%	3.4%	83.9%
Number of stores visited	\$0.00 to \$29,999	35.7%	0.0%	64.3%
	\$30,000 to \$49,999	28.1%	1.8%	70.2%
	\$50,000+	32.2%	3.4%	64.4%

TABLE 18. STATEMENTS ABOUT MALL REORGANIZATION BY GENDER

Attitude Statement	Males	Females	t-value	Level of Significance
I can find what I'm shopping for more easily.	5.9906	6.2294	1.91	.057
I can find a bargain more easily.	5.8208	6.0183	1.45	.148
The stores are harder to find.	2.2925	1.7982	2.40	.017
The organization matches my shopping patterns.	5.2736	5.6972	2.54	.012
It makes it harder for me to shop at this mall.	3.3019	3.1284	0.99	.324
It reduces the time I would spend shopping.	3.4057	3.0092	2.54	.012
It increases the distance I walk when I shop.	3.3868	3.1651	1.33	.184
It makes this mall a better place to shop.	5.4811	5.6239	1.01	.315

Classification Data

The age breakdown of the sample was 13% under 18 years of age, 24.2% 18 to 34 years of age, 34% 35 to 49 years of age, 20.5% 50 to 64 years of age, and 8.4% 65 years of age or older. More than 66% of the sample came from the immediate geographic area of the mall. Employment cat-

egories were 60.9% full time, 26% part time, 2.8% not employed, and 10.2% retired. The number of people in their households ranged from one to seven with a mean of 3.233. By household income, 0.5% earned less than \$10,000; 6% earned \$10,000 to \$29,999; 53% earned \$30,000 to \$49,999; 38.1% earned \$50,000 to \$75,000, and 2.3% earned more than \$75,000.

■ Discussion and Conclusions

As discussed earlier, the suburban regional shopping mall appears to have lost some of its original appeal to consumers. Facing increasingly stringent time constraints, many consumers are finding that their schedules no longer permit the number of leisurely based shopping trips which they once enjoyed. The beneficiaries of this change have been the category-killing specialty stores and value-oriented mass merchandisers, which are not ordinarily found in suburban regional shopping malls. Zonal merchandising has been presented by some experts as a possible way to attract these time-starved consumers back to the malls.

Zonal merchandising appears to have promise as a strategy for suburban regional shopping malls possibly to regain some of the business which has been lost to other shopping alternatives. Limited experience with zonal merchandising has produced beneficial results (product-based in Brazil and lifestyle-based in the U.S.). This study attempted to examine the attitudes of customers in an existing, suburban, regional shopping mall on remerchandising the center to reflect a zonal merchandising layout approach. The findings indicate that zonal merchandising may have promise in increasing visits to the mall and increasing the amount of money spent. Furthermore, these results were most pronounced when the zonal merchandising was based on product rather than on lifestyle.

Further findings from this study indicate that product-based zonal merchandising appears to possess the shortcomings anticipated. The use of product-based zonal merchandising strikes at the heart of the original foundation of suburban regional shopping mall layout. The suburban regional shopping mall was developed to facilitate leisurely browsing behavior—behavior that was expected to lead the customers through the entire mall during their shopping activities when facilitated by an appropriate center layout. The customary layout, where the most desired stores were placed at opposing ends of the center, encouraged/forced consumers to spend significant amounts of time in the mall during a typical shopping visit. Furthermore, it helped to facilitate impulse purchasing, as consumers would be able to view the offerings of most retail tenants in the center during their visit. Product-based zonal merchandising breaks from this

norm. Instead, product-based zonal merchandising encourages briefer, more purchase-directed, shopping behavior.

As reported earlier, even without the implementation of product-based zonal merchandising, it appears that mall shoppers are visiting these centers less for leisure reasons and more for product-driven behavior. As a result, consumers are spending less time in the suburban regional shopping malls when they visit, and they are also shopping at fewer stores. The results of this study suggest that product-based zonal merchandising may act to further this trend. However, the majority of subjects anticipate shopping at the mall more frequently and spending more money at the mall if product-based zonal merchandising were used. If the results are true, the possible negative impact from implementing product-based zonal merchandising appears to be offset by the increase in traffic attracted by the increased convenience afforded by the more accessible layout for product-driven customers. The initial results from the Brazilian experiments and the enthusiasm exhibited by study subjects would support this conclusion.

If corroborated by further research and by trials in this country, it appears that product-based zonal merchandising may have the potential again to revolutionize the layout of suburban regional shopping malls. Similar to how the layouts of suburban regional shopping malls were revolutionized by past innovations, such as the inclusion of multiple anchor stores some 40 years ago, to the more recent addition of food courts (a form of product-based zonal merchandising), center-wide product-based zonal merchandising may have the potential again to redefine consumers' suburban regional shopping mall experience.

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