

THE IMPACT OF AN ENTERTAINMENT RETROFIT ON THE PERFORMANCE OF A SHOPPING CENTER

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Overview

The article reports on the second and final stage of a study concerned with the impact of an entertainment retrofit on the performance of a shopping center. The study focused on the changes in the type of visitor and the level of patronage inside the Place Alexis Nihon in downtown Montreal after the construction of the neighboring Pepsi Forum. By tracking 729 individuals, a comprehensive picture of the spatial behavior and trip characteristics of visitors was developed that was compared with the behavior of 722 individuals before the entertainment center was opened. Motivations, trip-planning and evaluations were also probed with a questionnaire applied to 283 individuals. Expectations that each center would benefit from the presence of the other were largely not fulfilled. Results indicated that only a slight synergy exists between the entertainment venues and shopping. The estimated contribution to the shopping center of visitors whose first destination was the entertainment center was 5%. Except for anchor store patronage, the center experienced a decrease in visits to small stores and a tendency for visitors to remain on floors close to the ground. One year after opening, the entertainment center

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operators continue to try new retailing combinations to build their own clientele.



■ Introduction

This study was designed to measure the change in visitor behavior inside a shopping center (SC) resulting from an entertainment retrofit. Highly detailed information about visiting behavior was collected before and after the entertainment center (EC) opened, including patronage levels at stores, the distribution of trips through the center, visitor characteristics and trip planning. In this way, entertainment activity could be directly related to details of the shopping trips. The research is the second and final stage of a larger project intended to compare the possible impact that the new EC Pepsi Forum had on visitor behavior and patronage inside Place Alexis Nihon SC. The first stage of the research was conducted by Dr. Zacharias during the summer months of 1999 (Zacharias, 2000a). That study consisted of building a detailed database of visitor types, visitor behavior and expressed preferences for qualities of the SC prior to the opening of the Pepsi Forum.

It is a widely accepted premise in retail planning that the total presence of visitors and flow rates of visitors correlate with trading levels, although the precise levels of correlation have yet to be determined. ECs host a far greater density of people and sustained heavier flows when compared with most SCs—for example, there may be tens of millions of yearly visitors to major attractions like Pier 39 in San Francisco or the Quincy Market-Faneuil Hall complex in Boston. Locations adjacent to shopping or with shopping intermingled could potentially benefit tremendously, provided the clienteles for leisure and entertainment were much the same for the retailing outlets.

The first stage study allowed us to build a detailed database of trips, where the relationships between distances covered, duration of stay and the number of shop visits made were investigated. The distribution of visitors through the SC was quantified along with the relation between window browsing and store patronage. The recorded characteristics of the visit included trip frequency to the SC, means of transportation, trip purposes and the visitor's location before arrival. The second stage follows this framework in order to build a comparable database where statistical comparisons can be made between patronage levels and shopping behaviors.

■ Presentation of the Centers in Downtown Montreal

Place Alexis Nihon was built in 1971 and is located on the west side of the downtown area, about one kilometer from the heart of the shopping district. During the past several years, the central and eastern side of the downtown have experienced noticeable growth. The opening of the Paramount movie complex as part of a new clothing department store, Simon's, as well as the opening of a new SC, Les Ailes de la Mode, are emblematic of the resurgence in commercial activity that characterizes the core of the city, already well linked to Montreal's underground city. The west side of the downtown failed to benefit from this boom in spite of investor enthusiasm about the Forum development in the late 1990s. That situation is now changing with new institutional and retailing buildings going up in the vicinity.

Place Alexis Nihon is a classic multiple-use center: Two entrances at metro (underground) level deliver patrons directly into the SC lower floor, at the rate of about 9,000 people per weekday. The Atwater Avenue entrance has an even higher daily volume, with over 14,000 per weekday. On weekend days, the volume of traffic from the metro is halved, while the street traffic actually increases by about 10% over weekday levels. A community college with 10,000 students is directly connected to the metro level via the metro station, while other colleges and universities account for nearly 40,000 more students within one kilometer of the center. Three office towers on top of the mall have direct access. A parking garage with over 400 spaces is located above the mall and beneath the towers. The mall's shop mix includes 88 commercial outlets distributed on three floors around a large atrium (Figure 1). The anchor stores are: 1-Zellers, a household department store located at the metro level; 2-IGA supermarket, located at street level; 3-Canadian Tire hardware and household department store, at street level; 4-Pharmaprix drugstore, also at street level. The food court is located on the third floor. During the 1990s the mall went through a major renovation in which a glazed roof was introduced, along with new escalators, stairways and planting areas.

Immediately across Atwater Avenue from Place Alexis Nihon is the old Montreal Forum, the former home of the Montreal Canadiens hockey team, now retrofitted for the Pepsi Forum EC (Figure 2). Individuals can access the EC from Sainte Catherine Street, the major pedestrian street in the downtown, Atwater Avenue or from a parking garage located beneath the EC. A new landscaped pedestrian crossing was built between the busiest doors of each center. The city government funded improvements

FIGURE 1 THE ATRIUM INTERIOR OF THE PLACE ALEXIS NIHON SHOPPING CENTER.

to the local streets and sidewalks to accommodate the expected crowds of people at street level and increased vehicle flows. Most of the cinema wickets and fast food services are located at street level inside a cavernous, multi-tiered space (Figure 3).

The Pepsi Forum was inaugurated on May 4, 2001. The 320,000 square feet development consisted of an AMC-operated 22-screen movie megaplex, Jillian's (an entertainment center including billiards and a restaurant catering to middle-aged clientele), and over 100,000 square feet of retail and restaurant space. The ground floor was fully leased while the upper floors were less than half occupied in the first year.

■ Literature on the Effects Of ECs on Shopping Center Performance

In the past several years, research on enclosed SCs has increasingly shifted attention to the entertainment or recreational aspect of the shopping experience (Bloch, Ridgway and Nelson, 1991; Goss, 1993; Haynes and Talpade, 1996; Eastlick, Lotz and Shim, 1998; Zacharias, 2000a). Market saturation in the 1990s forced many mall operators to review their marketing strategies (Wakefield and Baker, 1998). The direct consumption of

FIGURE 2 A STREET VIEW OF THE FORUM ENTERTAINMENT CENTER (FOREGROUND) WITH THE SHOPPING CENTER AT REAR.



goods, it would appear, should no longer be the sole reason for promoting the mall. The emergence of ECs as a complement to retailing has presented an alternative means to draw additional customers, lengthen customer stay and increase customer expenditure (Haynes and Talpade, 1996).

EC strategy consists of repositioning real estate in order to capitalize on other activities. Mall managers around the world are now trying to make recreation an integral part of the shopping experience. The West Edmonton Mall, Canada's top tourist attraction, incorporates a 400,000 square feet theme park with indoor water slides and submarine rides (Bloch, Ridgway and Nelson, 1991) along with over 800 stores and restaurants. Entertainment venues are distributed throughout the mall. At the Mall of the Americas in Bloomington, Minnesota—still the largest themed retail and entertainment complex in the United States (Goss, 1999)—the EC is in a central position. These two examples are symptomatic of the experimentation that has gone on in the internal organization of entertainment and shopping. Location, transitions and linkages remain a somewhat experimental and risk-prone part of SC design (Brown, 1992).

The direct role of entertainment on SC performance remains elusive, however. Research has concentrated on case studies where entertainment

FIGURE 3 AN INTERIOR VIEW OF THE PEPSI FORUM ENTERTAINMENT CENTER.

and shopping were integrated from the beginning (for example, Goss, 1993; Eastlick, Lotz and Shim, 1998; Bloch, Ridgway and Dawson, 1994; Haynes and Talpade, 1996). These studies, while shedding important light on various internal dynamics, could not systematically determine the synergy between these two activities. Thus, it remains uncertain whether entertainment makes a positive contribution to a center's performance, whether it is necessary for operations and how best to integrate it with retailing. While research on the SC industry has flourished, much of it is concerned with structural changes and macro-scale analysis. With a few notable exceptions (such as Brown, 1999), there has been a lack of detailed research dealing with layout, design and behavior. Traditional methods of data collection, including retrospective surveys and personal diaries, have endemic problems; for example, relying on the power of recall of respondents, which we know to be partial, spatially distorted and temporally very imprecise. As a result, traditional preference studies or those investigating intentional behavior suffer from a poor correspondence with actual behavior (Gärling, 1997).

More detailed means for gathering data have been developed to deal with these methodological weaknesses. Tracking allows for the detailed examination of the shopping visit. This type of data-gathering complements self-report methods since it allows a finer look at specific elements

that may influence the shopping experience. Multiple converging techniques of analysis give us a more complete picture of the excursion and so allow us to understand how motivations are tied to behavior (Zacharias, 1997). The variability in shopping behavior is then related to a framework of variables that can in turn be related to each other. An added advantage of this procedure is the ability to test for reliability. For example, a sample of individual trips can be described as statistical choices and compared with movement and presence counts to ensure that interpretations made of the individual trips are truly representative of all trips.

Shopping trips involve a range of complex behaviors and intentions. As individuals wander through the mall, their perception of space forms their "consideration set," that is, a set of images intertwined with emotions and past experiences that individuals use when making decisions. These decisions vary from simple directional choices while walking to considering purchase decisions. In this manner, the mall's physical environment is an important factor determining the patronage of space and the consumption of goods and services (Brown, 1999; Wakefield and Baker, 1998). When studying complex physical environments, Brown (1992) suggests a cognitive-behavioral approach. While this approach acknowledges the existence of routine behavior inside the SC, it assumes that, faced with a range of opportunities, visitors make conscious and calculated choices. However, these choices rely on information received from the evaluation of stimuli, not as they are in reality but as the visitor perceives them. In this manner, the way the environment is presented and perceived is more important than the actual state of the environment. Perceptual illusions will determine the experience, which will eventually translate into approach or avoidance behavior. An understanding of how visitors perceive the local environment and what triggers their behaviors is therefore of considerable importance (Opperwal and Timmermans, 1999).

Further research in the topic of EC impact is inspired by varied and contradictory results in EC impact on shopping. Zacharias (2000a) found that 40% of the visitors to the Alexis Nihon SC came without a shopping purpose, while 20% never entered a shop. These groups are apparently vulnerable to the attractions of entertainment. Entertainment, however, does not always directly generate revenues. SCs have often been a place for "cultural entertainment," a place to walk around and pass time. Haynes and Talpade (1996) found that not only did entertainment not have a significant impact on mall patronage, it produced only marginally increased expenditure. Only a small proportion of shoppers are drawn to shopping malls because of the presence of entertainment facilities. The primary reason for going to the shopping mall remains shopping while

only a small proportion of shoppers are drawn to malls primarily as a result of the provision of entertainment facilities (Bloch, Ridgway and Dawson, 1994). Entertainment seekers are also less likely to visit department stores or other shops. They are found to spend less money overall compared with individuals who frequent the mall for shopping purposes (Eastlick, Lotz and Shim, 1998). It has been proposed that the presence of entertainment may result in a longer stay, translating into greater expenditures overall. It is true that entertainment seekers tend to stay longer inside the SC. However, duration of stay and expenditure were unrelated in studies examining cross-shopping behavior (Bloch, Ridgway and Dawson, 1994).

It has been proposed that mall managers could capitalize on the longer stay of entertainment seekers by turning them into cross-shoppers. Entertainment could expand the potential market of a center, increasing overall patronage and extending individual stays. Apparent vitality might then draw other visitors and keep them longer.

It is increasingly apparent that the shopping public is rather diverse in motivation, expectation and behavior. A successful marriage of entertainment and shopping may well involve better understanding two distinct types of clientele. As malls are refitted to heighten atmospheric effects and to provide unique experiences and whole areas are given over to entertainment, the definition of shopping itself is called into question, as indeed is entertainment.

■ Field Survey Methods

A closed questionnaire was applied to 283 randomly selected individuals in Place Alexis Nihon and the Pepsi Forum at scheduled times representing day of the week and time of day. The questionnaire was identical to that carried out in 1999. The goal was to detect differences in the clientele and their visiting behavior at Place Alexis Nihon before and after the construction of the Pepsi Forum, as well as differences on the same factors between the two centers. The questionnaire focused on the spatial and temporal context for their visit—where they had been, people they were meeting, plans and experiences. We asked where they had been immediately prior to their visit, the frequency of their visits and their intentions to visit the immediate environment. In other words, the questionnaire focused chiefly on qualitative information not available through direct observation.

A tracking study was undertaken with the intention of measuring the various flows while cataloguing the details of visits and activities. Undergraduate students in the Urban Studies program at Concordia Uni-

versity carried out the surveys after training, for possible course credit. An initial sample of 1,150 individuals followed was reduced to 729 tracks after removal of records with inconsistencies or incomplete information, resulting in 487 with a start-point at entrances to Alexis Nihon and 242 with a start-point at Pepsi Forum. This survey was carried out in October 2001.

Tracking consists of the following: the observer selects an individual at random crossing the entry cordon. The observer follows at some distance, recording the information at intervals on paper maps or handheld devices. A map is thus prepared of the detailed itineraries of the trips, including a trajectory of movement in corridors. The map record is related to a table containing walking speed, times in shops and other locations, window-shopping along with some obvious personal characteristics. The tracking ends when the observed individual exits the center or spends more than 10 minutes inside a particular shop or service. The field data are then entered in a Geographical Information System (GIS), so statistical trends related to spatial layout can be read more effectively. In our case, the spatial distribution of paths over the corridor system before the Forum was opened was compared with those after.

Finally, the flow rates into and out of the two centers at all entrances where tracking was carried out were also recorded at peak and off-peak times throughout the week during April 2002. These flows were used firstly to distribute statistically the tracked trips at each entrance and secondly to validate our findings concerning linkages between shopping and entertainment, garnered through the questionnaire.

The GIS enabled us to view the behaviors of visitors from each of the entrance points and to observe the concentrations of store visits spatially and in proximity to the flows. We also observed the relative distribution of visits to anchors and small shops and changes in the distribution of visitors across three floors in each center. A variety of scenarios for behavior were then tested in the GIS and SPSS, discussed in the following section.

■ Results and Analysis

The chief differences in the clientele at the two centers relate to how they arrived, with whom and for what purpose. While there is no difference in the age structure of the two clienteles, there are proportionally more women in the SC (51%) than in the EC (41%). A higher proportion of visitors to the EC are arriving with others (57%) compared with the proportion of groups at the SC (30%). Table 1 illustrates the differences in the chosen mode of transportation, the group formation and frequency of visit upon arrival of visitors to the two centers.

TABLE 1. TRANSPORTATION, VISIT FREQUENCY AND GROUPS

| | SC without EC | | SC with EC | | EC | |
|----------------------|---------------|----|------------|----|-----|----|
| | (%) | n | (%) | n | (%) | n |
| Transportation | | | | | | |
| metro | 40 | 66 | 48 | 64 | 34 | 48 |
| car | 19 | 31 | 14 | 18 | 32 | 46 |
| bus | 16 | 26 | 11 | 15 | 8 | 11 |
| foot | 25 | 41 | 27 | 35 | 26 | 37 |
| Arrive . . . | | | | | | |
| alone | 58 | 92 | 48 | 66 | 22 | 32 |
| alone to meet others | 12 | 19 | 22 | 30 | 21 | 31 |
| with other people | 30 | 48 | 30 | 42 | 57 | 82 |
| Visit frequency | | | | | | |
| >3/week | 28 | 45 | 38 | 53 | 12 | 17 |
| 1-3/week | 29 | 46 | 32 | 44 | 20 | 29 |
| >1/month | 16 | 25 | 13 | 18 | 25 | 36 |
| <1/month | 27 | 44 | 17 | 23 | 43 | 63 |

A higher proportion of visitors to the EC arrived by car (34%) compared with the SC (14%) although they tended to arrive from the same diversity of locations. (The addition of the garage after the work had started was thought to be essential although resulting in a delayed opening.) The generally underused 400 spaces in the upper floors of the neighboring center (Alexis Nihon) gained few if any visitors, whose primary purpose for being in the vicinity was to see a movie, play billiards at Jillian's or climb the rock wall. They tended to park beneath the EC, only half of them venturing into the shopping concourse. Most of those arriving by car were in groups. Not surprisingly, there was more group behavior at the Pepsi Forum. On the other hand, the proportion of individuals in groups remained unchanged at Alexis Nihon and is not negligible at 30% of all individuals interviewed. Before the Forum, visitors to Alexis Nihon made on average 1.5 visits per week, while they made 2.2 visits per week after. Visitors to the EC came on average once every 10 days.

Visitors were asked to make multiple choices with respect to their trip purposes (Table 2). Certain insights can be seen from these results, although the sample size is too small for full-scale analysis. There is an obvious and important difference in the shopping intentions of visitors to the two centers, with visitors to the EC showing almost no interest in shopping. In light of the accumulating evidence for two distinct clienteles, the relatively low proportion of self-declared shoppers at the SC might seem paradoxical. Also of interest is the drop in moviegoers at Alexis

TABLE 2. STATED PURPOSE FOR VISIT (MULTIPLE CHOICES)

| Reason | SC without | | SC with | | EC (%) | n (/145) |
|---------------------|---------------|-------------|------------|-------------|-----------|-------------|
| | EC (%) | n (/160) | EC (%) | n (/138) | | |
| to shop | 28 | 94 | 30 | 61 | 4 | 8 |
| to walk around | 14 | 48 | 5 | 10 | 5 | 9 |
| to pass time | 13 | 44 | 12 | 24 | 8 | 16 |
| to eat | 13 | 43 | 17 | 34 | 12 | 24 |
| to pass through | 7 | 25 | 9 | 19 | 9 | 18 |
| for household goods | 9 | 31 | 8 | 16 | 0 | 0 |
| for entertainment | 3 | 11 | 3 | 7 | 11 | 22 |
| to meet someone | 2 | 8 | 10 | 21 | 5 | 10 |
| to work | 4 | 14 | 5 | 10 | 3 | 5 |

Nihon after the EC opened. The two-room cinema within the SC closed at the same time. Finally, few visitors to the SC considered they were there for entertainment, although the figure is not remarkably higher for the Forum. When respondents said they were going to a movie, they tended not to suggest in addition they were there for other entertainment.

The questionnaire provided an additional way to gauge linkage between the two centers, in addition to the tracking and door counts. Only 3% of visitors to the SC said they had already visited the EC, while another 13% said they would do so on this visit. On the other hand, 43% of visitors to the EC said they had been to the SC and another 30% said they would go later. In other words, the EC is much more linked to, and dependent upon, the SC than the contrary.

The total exchange between the two centers remains relatively small overall. The total flow between the major entrances of the two centers is about 200 persons per hour, while comparable flows at the major doors of the SC see 1,500 people pass in an hour. Put another way, just 15% of those leaving the SC at the closest and busiest door actually cross to the EC.

Table 3 presents details from the tracking studies before and after the EC opening. It will be seen that the changes in behavior are rather modest, although there are significant drops in the length of time spent in the SC and the distances covered. One of the main expectations of the EC is that it may retain visitors for longer periods of time. A MANOVA was performed in order to determine if there were significant differences in the average duration of stay and average trip length in Place Alexis Nihon before and after the construction of the Pepsi Forum. After the construction of the Pepsi Forum, average trip duration in Place Alexis Nihon

TABLE 3. DETAILS OF THE VISITS FROM TRACKING (N = INDIVIDUALS TRACKED)

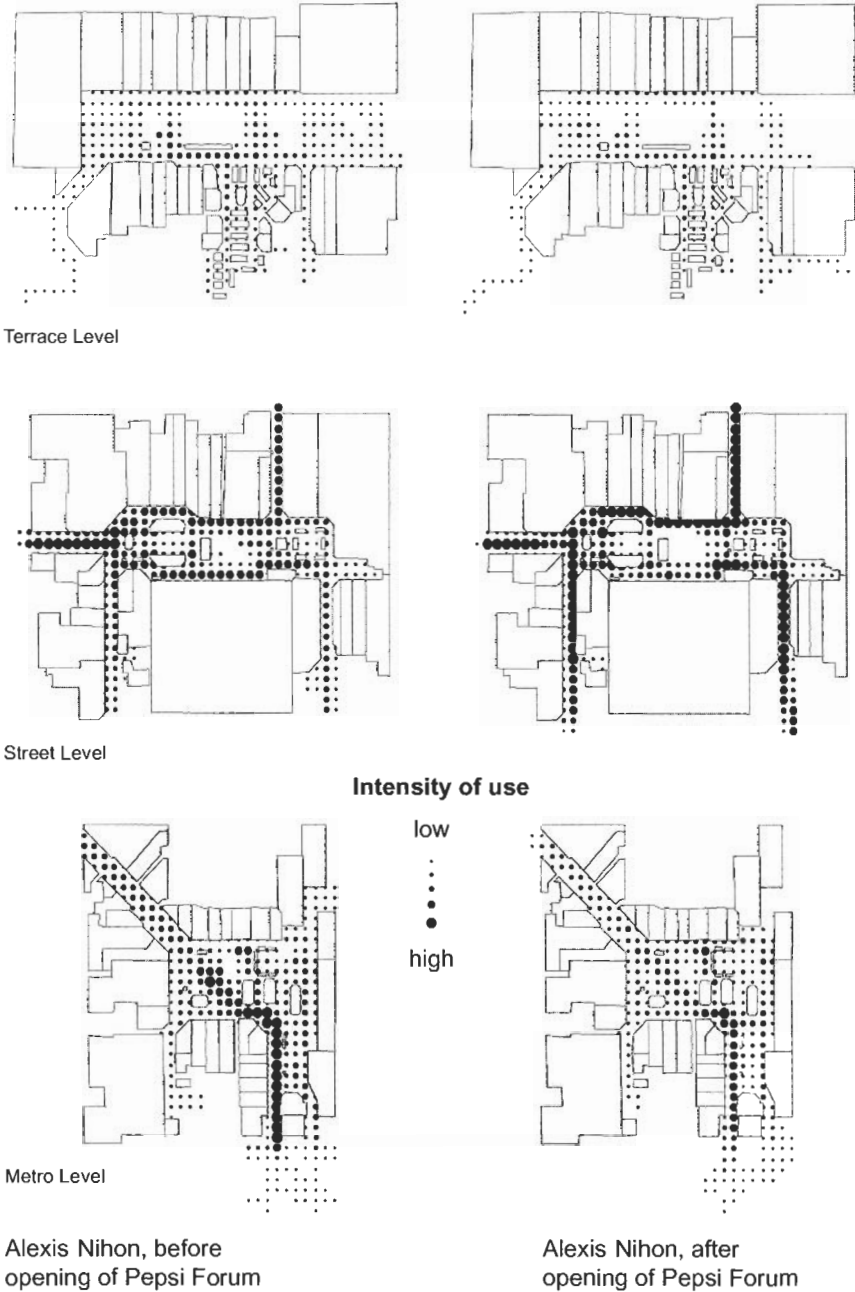
| | SC without | | SC with | | | |
|---------------------------|------------|-----|---------|-----|-----|-----|
| | EC | n | EC | n | EC | n |
| Mean distance walked (m) | 133 | 722 | 129 | 487 | 101 | 242 |
| from street | 131 | 499 | 129 | 401 | — | — |
| from metro | 141 | 209 | 130 | 86 | — | — |
| Mean time spent (min) | 10.7 | 717 | 9.4 | 484 | 6.6 | 235 |
| before exiting | 8.6 | 318 | 8.4 | 254 | 7.7 | 72 |
| before final stop | 12.3 | 398 | 9.4 | 193 | 6.1 | 163 |
| Trips (%) by no. of stops | | | | | | |
| 0 | 20 | 147 | 15 | 75 | 16 | 39 |
| 1 | 42 | 306 | 45 | 221 | 59 | 143 |
| 2 | 23 | 163 | 23 | 113 | 17 | 42 |
| 3 | 8 | 55 | 11 | 54 | 4 | 10 |
| 4 | 4 | 31 | 4 | 19 | 3 | 6 |
| 5+ | 3 | 20 | 1 | 5 | 1 | 2 |
| Mean no. stops | 1.5 | 722 | 1.5 | 487 | 1.2 | 242 |
| Level changes (%) | | | | | | |
| 0 | 46 | 331 | 51 | 246 | 73 | 176 |
| 1 | 42 | 305 | 43 | 207 | 13 | 32 |
| 2 | 9 | 68 | 6 | 31 | 12 | 30 |
| 3+ | 3 | 18 | 1 | 3 | 2 | 4 |

decreased by 1.3 minutes to 9.4 minutes. Note that this is a conservative estimate, since it does not account for long stays in stores. There were no significant differences in average trip length ($F(1, 1201) = .991, p = .320$) after the entertainment retrofit. An ANOVA on the average number of shops visited before and after the entertainment retrofit revealed no significant differences ($F(1, 207) = .012, p = .911$). In fact, the average mean rate of store visits stayed constant at 1.46. A significantly higher proportion of visitors to Alexis Nihon were exiting before spending more than 10 minutes in a shop. While they were making the same number of shop visits at Alexis Nihon, these tended to a greater degree to be visits to the four anchors.

A χ^2 test was performed in order to determine if there was any significant change in the number of floors visited inside Place Alexis Nihon after the construction of the Pepsi Forum. Results revealed a significant reduction ($F = 11.070, p = .026$) in the distribution of visitors across floors after the EC. Prior to opening, 12% of visitors made three or more floor changes. While the flow between centers is not strong, it is comparable to the loss of traffic to the uppermost floor of the SC. A causal relation is more than possible between these two phenomena.

Figure 4 shows the concentrations of tracked pedestrians through

FIGURE 4 THE PLANS ON THE LEFT ILLUSTRATE THE INTENSITY OF PEDESTRIAN MOVEMENT FROM MAJOR ENTRY POINTS BEFORE THE OPENING OF THE FORUM EC, WHILE THE PLANS ON THE RIGHT SHOW THE INTENSITY AFTER THE OPENING OF THE FORUM.



the various floors of the SC before and after the EC opening. Each person crossing a grid square in the GIS contributed to a tally represented by the size of the black dot. The halls and open spaces of the SC show definite patterns of movement from particular entrances, with some spaces receiving very few visitors. The SC remains relatively healthy in economic terms. Nevertheless, certain structural weaknesses derived from an enclosed vertical design are not helped by revitalization of the surrounding street environment. The EC and related venues in the surrounding area promote the use of a single path covering a small part of the whole SC.

Long stays in stores—more than 10 minutes—decreased by 13%. The question then is just how differently people are spending their time in the SC. The visit is more quickly executed now, even though the same number of shopping outlets is visited. Fewer people are seen socializing in the open spaces; on the other hand, the amount of restaurant seating has increased and is well occupied.

Qualitative assessment of the centers suggests that visitors see the two places not only as appropriate for different activities, but also as possessing quite different physical characters. While natural lighting, plants, interior design and atmosphere figured prominently in the assessments of Alexis Nihon, these same features were discounted at the Forum. The Forum is artificially lit. Visitors to Alexis Nihon express as much enthusiasm for the mix of friendly people as for the types of shops and restaurants. Visitors to the Forum invariably cite the movie theaters as the single strong suit of the center.

■ Conclusion

The study intended to measure the change in visitor behavior inside a SC as a result of an entertainment retrofit. The Place Alexis Nihon and Pepsi Forum case study revealed that only a slight synergy exists between the two centers. It was found that the majority of visitors to Place Alexis Nihon tend to be regulars and arrive at the center by metro. Their purpose is mainly shopping, although more than one-third has other intentions or no specific plan. Less than 20% of individuals visiting Place Alexis Nihon first had visited or planned to visit the Pepsi Forum, while more than two-thirds of those visiting the Forum had visited the SC first or intended to do so. Visitors to the Pepsi Forum come infrequently and largely for going to a movie. They tend to be car drivers, arrive in groups and stay a very short time before and after the movie. Only one-third of these entertainment seekers visit a store or any other attraction in the EC before or after the movie. The Forum has many displays of hockey memorabilia, photos of famous hockey players, original seats and “center ice.” A small

number of visitors, perhaps no more than 10 at one time, attend these displays. They are typically not moviegoers, however.

The decrease in floor distribution and non-anchor store patronage in Place Alexis Nihon after the construction of the Pepsi Forum may be attributed to structural changes in retailing and entertainment outside the immediate study area. The recent boom of Montreal's downtown east of these two centers may have dispersed some of the clientele.

About half of the leasable space at the upper three levels of the Forum remains empty. A new media and electronics store may be more in tune with the interests of moviegoers than hardware or take-home food, but patronage levels there also remain low. The upper floors remain resistant to leasing. Commercial vacancy rates overall in the city have been falling steadily for five years, while the city's GDP has been rising at an annual rate of more than 5%. The upper-floor leasing problem, in other words, is not a reflection of wider economic malaise. The SC released its most prized space to a young person's sports store, Sports Experts, apparently with an eye to attracting Forum visitors. While the centers look for ways to create synergy, it may be difficult to overcome space. Both centers are well connected to each other and to busy Sainte Catherine Street, but both experience problems with their upper floors. An astute planner might recommend a bridge. Such a solution, whatever the real benefits it might bring to the viability of large parts of both centers, would not be allowed by the city government, which has a long-standing policy against such features. In any event, it is doubtful the problem is purely one of vertical integration. Successful examples of multi-leveled SCs abound, even in the same downtown.

Our surveys did not reveal remarkable differences in the visitors at the two centers along the usual dimensions. However, few college students frequent this environment, while many more people from neighboring residential areas come regularly to Place Alexis Nihon. In spite of the massive effort represented by the opening of the Pepsi Forum, this area of the city remains somewhat unattractive to young people with means and intentions to spend on leisure activity.

A downtown location for an EC offers all the advantages of linkage with existing, thriving shopping areas but also a number of risks. Downtown Montreal is not like Disney downtown at Disneyworld, for example, where a captive clientele moves in a limited space between major venues. Most city locations are in a permeable environment where visitors might well decide to shop elsewhere but nearby.

The success of the EC and its potential contribution to local trade remains strongly tied to its location in the downtown, connections to major movement, layout and design.

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