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A segmentation study of Israeli mall customers

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ABSTRACT

The study presents a segmentation of Israeli mall customers. The study sets three goals: developing a typology of Israeli mall customers based on their behaviors; examining the socio-demographic profile of each segment; and comparing Israeli customers to customers from other countries. The behaviors in this study are divided into three categories: visiting patterns; motivations for trips to the mall; and activities engaged in during the visit. Data were obtained from 636 Israeli customers. The main findings suggest four groups of customers: Disloyal, Family Bonders, Minimalists and Mall Enthusiasts. The segments were found to differ in socio-demographic characteristics. The study results can serve as a marketing tool for retailers.

1. A segmentation study of Israeli mall customers

Shopping malls have become important retail venues during the past five to six decades. Although reportedly, traditional suburban malls have been declining in the US for several years (Nicholls et al., 2002; Southworth, 2005), facing increasing competition from e-commerce and discount venues (Ruiz et al., 2004) and suffering from "over-malling" (Yavas, 2003), they continue to operate as the main "display windows" of the retail industry throughout the world. Indeed, empirical evidence indicates that shopping malls are flourishing in countries around the world (El Sayed et al., 2003; Erkip, 2005; Frasquet et al., 2001; Millan and Howard, 2007). The increasing competition between shopping malls has transformed them into destinations in their own right, regardless of the marketing mix they offer. Since too many malls look alike and since the shopping experience offered by malls can often be unpleasant for customers (Wakefield and Baker, 1998), retailers must develop new ways to survive in an ever-competitive industry (Nicholls et al., 2002; Reynolds et al., 2002).

The proliferation of malls around the world did not skip Israel. In a matter of 20 years, between 1985 and 2005, the country experienced a building boom in this field, resulting in approximately 220 different commercial centers, distributed throughout the country (there is no reliable precise figure; this figure is taken from publications in the press, based on data derived from consulting firms). The extensive construction of malls in Israel led to "over-malling" in some geographical areas, a phenomenon well known to the American industry (Yavas, 2003). It can be argued, based on the retail life cycle theory (Frasquet et al., 2001), that the Israeli mall industry has reached the maturation stage, characterized by threats to growth and profitability.

The increasingly heavy competition in the Israeli mall industry means that to be successful, retailers operating in Israel need a better understanding of their customers. In this context, the present study focuses on the segmentation of Israeli mall customers. The segmentation in this study is based on customers' behaviors, with socio-demographic characteristics as descriptive variables. The paper is structured as follows: the first section deals with a description of the Israeli mall industry, followed by a brief survey of the relevant literature about mall customer segmentation. The focus then shifts to the research objectives, method and findings of the current study. The final section discusses the study's results and offers some managerial implications.

1.1. The development of the Israeli shopping mall industry

Malls appeared in Israel in the mid-1980s, as North American entrepreneurs began to export the mall concept to different locations around the world (Crawford, 1992). The first shopping mall in Israel was opened in 1985 on the outskirts of Ramat Gan, a satellite city in the greater Tel Aviv metropolitan area. This mall, the Ayalon, was built by a Canadian (and former Israeli) entrepreneur, David Azrieli, a real estate investor with interests in a number of countries around the world (Malki, 2006). The Ayalon Mall was not the first shopping center in Israel. However, the oldest shopping centers were not characterized by sole ownership. Instead, shops were sold to different merchants at the end of the structuring period. Thus, the opening of the Ayalon Mall marked a shift in the Israeli retail industry in two ways: first, by shifting from multiple ownership to sole ownership of the retail complex; second, by incorporating global investments into the Israeli retail market (Malki, 2006).

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The success of the Ayalon Mall from its second year led to a 20-year building boom, resulting in approximately 70 shopping malls, out of 220 commercial centers. The rapid proliferation of malls and other retail venues in Israel led to the country soon reaching the saturation point, with .31 square meters of retail areas per resident (Malki, 2006). The Israeli press reports that shopping malls contribute 41% of the annual revenue of the entire retail industry, with profits of about 20 billion dollars a year (Berger, 2007, April 26; Doner, 2007, January 29).

The proliferation of shopping malls in Israel was accompanied by the entrance of international retailers and global brands in variety of sectors such as fashion, cosmetics, fast food, office equipment, toys, DIY, etc. At the same time, national chains in the fields of fashion, cosmetics, books, and—more recently—coffee shops began to evolve as well. Thus, the establishment of shopping malls in Israel served as a platform for the prosperity of international and national retailers, and contributed to the adoption of a global consumer culture (Azaryahu, 2000, p. 56).

The majority of Israeli malls were built by sole local entrepreneurs. The Azrieli group was the only firm to engage in the Israeli mall industry from its beginning. Since 2005, due to changes in Israel's real estate regulations, mainly the opening of the country's real estate market to (Real Estate Investment Trust) (REIT) funds, the Israeli mall industry has been facing a process of incorporation and the emergence of mall chains, with several malls operated by the same management. After two years (2005–2007) of intensive ownership changes, Israel now has three large firms that own a large proportion of the country's most profitable malls (Doner, 2007, January 29) and three or four smaller firms that also play an active role in the industry.

Though shopping malls have existed in Israel only for about 20 years, they have succeeded in becoming the preferred commercial and public places in the country. Many shops in commercial streets have relocated to the malls and power centers, while the traditional public streets, under the authority of the local municipalities, have become dirty, neglected and a venue for criminal activities (Markowitz and Uriely, 2002). A recent study shows that the majority of the Israeli population (77% of respondents) prefer the shopping mall to the commercial street and traditional open-air market (Gilboa, 2007). In a different study, focusing on the shopping districts of the city of Beer-Sheba (Markowitz and Uriely, 2002), it was found that middle-class residents prefer the new retail venue (the power center) over the old commercial district for three main reasons: first, it symbolizes an atmosphere of globalization and connection to the western world, mainly America; second, it is perceived as a more secure place, where other shoppers will be the people similar to themselves; and third, they see no real alternatives. Other indications of the mall's place in Israeli society can be seen in the fact that politicians visit malls during their campaigns for municipal and national elections, and the press goes to malls to gain insight into public opinions.

Although Israeli malls symbolize the globalization of Israel, they do have several characteristics that distinguish them from their counterparts elsewhere in the world. The typical Israeli mall building is a replica of the basic North American suburban mall model, namely, corridors of small shops connecting large anchor stores. However, Israeli malls tend to be smaller in size (in part because of the country's smaller population) and to be situated in city centers on expensive land. As a result, shopping malls in Israel can be divided into three categories: large malls are those with over 20,000 square meters of commercial space; medium-sized malls have 10,000–15,000 square meters; and small malls have a commercial space of under 10,000 square meters. The location in city centers has resulted in buildings that stretch over two or three floors. In addition, their urban location makes Israeli malls accessible to public transportation as well as to private vehicles.

The marketing mix of Israeli malls is composed mainly of national and international chains in fashion, cosmetics, food, etc. However, as there are no large department stores in Israel, different shops such as fashions, pharmacies, coffee shops and supermarkets may operate as substitute anchors (Gilboa, 2007). Yet the industry's main problem lies in its inability to differentiate the marketing mix between malls, including malls of different sizes. As a result, the feeling among the Israeli public is one of "you've seen one, you've seen them all" (Berger, 2006, December 28).

Another unique aspect of the Israeli mall relates to security issues. Due to the political situation in Israel, which is characterized by terrorist attacks on public places, it is accepted that every entrance to a mall will be guarded by at least one security officer (under Israeli law, the local police have the authority to determine how many guards must stand at each entrance). As such, malls are perceived by the public as more secure than open markets and streets, which are more vulnerable to terror attacks (Malki, 2006).

To summarize, Israeli malls have become central in both the Israeli retail market and its public sphere. In contrast to malls elsewhere in the world, Israeli malls are accessible to large groups of the population, including those who rely on public transportation. Their urban locations have contributed to their establishment as public centers for city residents. Their attractive power derives from their global appearance, combined with a secure and physically comfortable (air-conditioned) environment.

1.2. Mall customers' activities

The field of customer shopping behavior has been extensively researched (Sinha and Uniyal, 2005). However, most research concerning shopping behavior in malls has traditionally tended to focus on specific stores and not the mall in general (Ruiz et al., 2004). It is only recently that shopping malls have come under investigation in their own right (i.e. Anselmsson, 2006; Chebat et al., 2005; De Juan, 2004; Frasquet et al., 2001; Michon et al., 2005; Wesley et al., 2006; Zhuang et al., 2006).

One of the best-known methods of studying customers and shopping behavior is through segmentation. Though customer segmentation is an old technique in the marketing literature (for a comprehensive review, see Sinha and Uniyal, 2005), the majority of mall segmentation studies were conducted during 1970s, 1980s and 1990s (Reynolds et al., 2002). Reynolds et al. (2002) indicate that in an ever-changing retail industry, where retailers must strive to adapt to the demands of new customers, the relevancy of the old studies is questionable. In addition, most segmentation studies of mall customers have been conducted in North America (e.g., Bellenger and Korgaonkar, 1980; Bloch et al., 1994; Reynolds et al., 2002; Roy, 1994; Ruiz et al., 2004). However, recent evidence from other countries points to cultural differences among mall customers (Frasquet et al., 2001; Millan and Howard, 2007). Therefore, the present study seeks to contribute to the growing field of cross-cultural research into mall customers' behavior by examining customers in Israeli malls.

Table 1 summarizes the principal mall customer segmentation studies. As can be seen in the table, one way to segment mall customers is by focusing on their activities (Bloch et al., 1994; Ruiz et al., 2004). This has the advantage of offering a better understanding of what customers do while they are in the mall rather than who they are, i.e. their socio-demographic characteristics (Ruiz et al., 2004, p. 334). Such studies have identified four main types of customers: (1) those who go to the mall to buy, eat, stroll and in general experience the mall atmosphere (Bloch et al., 1994;

Table 1
Summary of principal mall customer typologies.

Author/year	Research focus	Sample size	Shopper types
Roy (1994)	• Number of trips to the mall • Functional economic motivation • Recreational shopping motivation	710 in one mall	• Frequent mall shopper • Infrequent mall shopper
Bloch et al. (1994)	• Behaviors • Benefits	600 in three different malls	• Mall enthusiasts • Traditionalists • Grazers • Minimalists
Frasquet et al. (2001)	• Socio-demographic characteristics • Perceived value	402 recruited from three different postal code districts	• Middle-aged married people • Housewives • Youngsters • Single people in their twenties and thirties
Reynolds et al. (2002)	• Attributes	1097 in a traditional mall 827 in an outlet mall	• Basic • Apathetic • Destination • Enthusiasts • Serious
Ruiz et al. (2004)	• Psychographic • Perception • Emotion • Atmospheric • Density • Approach avoidance reaction • Behavior • Non-economic costs • Socio-demographic characteristics	889 in one mall	• Recreational customers • Full-experience mall customers • Traditional • Mission customers
Millan and Howard (2007)	• Shopping motives • Shopping values • Shopping enjoyment • Shopping behavior • Socio-demographic characteristics	355 in seven different malls	• Relaxed utilitarians • Strict utilitarians • Committed customers • Browsers

Ruiz et al., 2004); (2) those who go for specific services or facilities (e.g., children's programs, movies, or the gym) or to browse without making purchases (Bloch et al., 1994; Millan and Howard, 2007; Ruiz et al., 2004); (3) those who go to pass the time, to interact with others, or to engage in impulse buying (Bloch et al., 1994; Ruiz et al., 2004); and finally, (4) those who rarely go to the mall for any reason and are almost not engaged in any mall activity (Bloch et al., 1994).

A review of the literature about mall customers reveals some confusion over the definition of "customer activities". A fundamental problem is that the term "activities" is used broadly to cover various categories. For instance, *motivations for a trip to the mall* might encompass such activities as making a specific purchase, looking and browsing, or going to specific stores (Bloch et al., 1994; Frasquet et al., 2001; Haytko and Baker, 2004; Millan and Howard, 2007; Nicholls et al., 2002; Roy, 1994; Ruiz et al., 2004). *Activities performed during the visit* might include chatting with other customers, making an unplanned purchase, or eating a snack (Bloch et al., 1994; Haytko and Baker, 2004; Ruiz et al., 2004). *Visiting patterns* include whether the customer is loyal to a specific mall, frequency of visits, length of stay and accompanying persons (Adkins LeHew et al., 2002; Erkip, 2005; Millan and Howard, 2007; Nicholls et al., 2002; Roy, 1994; Ruiz et al., 2004). The present study seeks to resolve this confusion between motivations, activities and visiting patterns by treating these three categories as different dimensions of customer behavior in malls. This will help us understand how each category varies between different groups of customers.

1.3. Research objectives

The first objective of the present study is to develop a typology of Israeli mall customers based on their behaviors. Segmentation of customers will be based on a division of the term "customer behaviors" into three categories: motivations for the trip to the mall; activities engaged in during the visit; and visiting patterns.

The second objective of the study is to examine whether the segments are significantly different in their socio-demographic profiles. Recent studies indicate the importance of socio-demographic characteristics as descriptive variables explaining differences among customers (Frasquet et al., 2001; Millan and Howard, 2007; Ruiz et al., 2004). Understanding the differences among segments will allow retailers to target particular groups and tailor marketing campaigns to different population segments.

The third objective is to examine the similarities and differences between Israeli customers and customers from other countries. A growing body of cross-cultural studies (Millan and Howard, 2007; Nicholls et al., 2000; Zhuang et al., 2006) has already shown that local cultural differences play a large role in explaining customers' behavior. Given the differences between Israeli and other western societies, it is worth examining whether the behavior of Israeli customers is similar to that of their counterparts elsewhere (particularly North Americans, subject of most research), or whether substantial differences exist between Israeli mall customers and customers from other countries.

The present study differs from the previous literature in its sampling technique. Most segmentation studies on mall customers have been conducted in specific malls (mall intercept samples) through recruitment of on-site customers (see Table 1). While this method assures the participation of real customers, its generalizability is doubtful (Swinyard, 1998). To address this weakness, the present study used two samples, one comprising on-site customers, and the other, random customers contacted by phone.

2. Method

2.1. Sampling procedure

The study sample included 636 respondents, and was composed of two different sample populations drawn from the Jewish population of central Israel. We chose to limit our sample to this population due to the relatively high concentration of Israelis who live in this region (according to the Central Bureau of Statistics of Israel, 53% of the Israeli population lived in central Israel in 2004, among whom 89% were Jewish). In addition, central Israel has the highest quantity of shopping malls in the country (there is no exact figure; this assumption is based on Internet sites of shopping malls, such as www.kenyonim.co.il).

The first sample was a mall intercept based on a convenience sample of 335 respondents who volunteered to fill out the study questionnaire in four different shopping malls in central Israel (two large malls with 37,000 and 35,000 square meters [400,000 and 377,000 square feet], respectively, of retail space, one medium mall with 15,000 square meters [160,000 square feet] of retail space, and one small mall with 6000 square meters [65,000 square feet] of retail space). All four malls belong to the same chain, which gave permission for the study researchers to collect data on the mall premises. The two smaller malls are the sole malls in their municipalities (with populations of 166,190 and 43,137, respectively). The two large malls are located in two of the biggest cities in Israel, and while not the sole malls in their municipalities, they are recognized as among the largest and most important.

The data collection was performed during July–August of 2005. Respondents were invited by the author and research assistants to complete the study questionnaire. Those who agreed to participate were directed to an area where they could sit down and complete the survey comfortably (tables and chairs were supplied by the mall management). The data were collected over a period of four weekdays (Friday and Saturday, the weekend days in Israel, were not included in the data collection period), with each day devoted to a different mall. The collection of data in each mall lasted 4–6 h, in order to cover customers arriving at different times. The collection of data during the summer vacation led to a sample that can be characterized as young and single. Though all mall visitors were approached, the majority of respondents were Jewish (see Table 2).

Based on conclusions derived from the first sample, and in order to reduce the bias of recruiting only on-site customers during weekdays, a second sample was contacted by phone. This sample group included 301 Jewish respondents selected randomly from the population of central Israel aged above 15. The data were collected during September–October 2005. The sampling technique was based on a stratified sample, where each city in central Israel served as a layer, and the number of respondents sampled from each city was relative to the city size. The rate of response of the second sample group was 88%. The marketing research firm which collected the data sampled mostly women. This bias was due to their research experience with the customers of Israeli shopping malls who are mostly women. As a result, the sample was biased towards older married women (see Table 2).

Table 2
Socio-demographic characteristics of the study samples (in percentages).

	Mall sample	Phone sample	Full sample
Gender			
Men	33.3	25.3	29.4
Women	66.7	74.7	70.6
Age			
Range of ages	12–71	15–70	12–71
Average age	24.5	34	29.5
18 through lowest	38.7	18.4	28.5
19–24	28.3	17.7	21.9
25–44	53.3	34.1	29.9
45 through highest	9.7	29.8	19.7
Marital status			
Single	69.6	39	54.9
Married	25	55.1	39.4
Divorced and widowed	5.4	5.9	5.7
Parents to children under the age of 15	18.6	45	31.5
Religious affiliation			
Religious	19.7	13.4	16.4
Traditional	26.8	28.2	27.4
Secular	53.5	58.4	55.9
Occupation			
Workers	47.2	61.3	54.1
Non-workers	10.6	16.4	13.4
Adolescents and young people (students and soldiers aged 18–21)	42.2	22.3	32.5
Income			
Below average	38.2	30.5	34.2
Average	24.8	30.1	27.5
Above average	36.9	39.5	38.3

Though the two samples differ in their socio-demographic characteristics (see Table 2) and period of collection, they were integrated into one sample from several main reasons. First, in Israel, there is no great difference between the periods of July–August and September–October. The school vacation period in Israel takes place during July and August. This period is characterized by frequent visits to shopping malls, mostly to entertain the children. September–October is the period in which the Jewish holidays (Rosh Hashanah, Yom Kippur and Succoth) take place and is also a period of intensive shopping in shopping malls, when people go to the malls to buy presents for the holidays (in a manner similar to that in the period preceding Christmas in Western countries). Second, the mall sample was biased towards young and single people, while the phone sample was biased towards older married women. Thus, integrating the two samples meant less bias in gender, age and marital status. Third, factor analyses of the main items of motivations and activities performed separately for the two samples show similar results. These results indicate that despite their socio-demographic differences, the two samples express similar mall behavior (see Appendix A).

The complete sample was composed of 179 men (29.4%) and 430 women (70.6%). Among them, 338 (56%) identified themselves as secular, 166 (27.5%) as traditional,[1] and 101 (16.5%) as

[1] The definition of “traditional” as part of religious affiliation is unique to the Israeli society. It means that these people maybe light candles on Shabbat, maybe keep some Kosher rules, but most of them do not go to synagogue on regular basis.

religiously observant. The respondents ranged in age from 12[2] to 71, with an average age of 29.5; the majority of respondents (61%) were below the age of 30. Of the respondents, 329 (55%) were single, 236 (39.3%) were married and 34 (5.7%) were divorced or widowed. Almost a third (186) were parents of children under the age of 15. Regarding employment status, 319 (54.1%) were working, 79 (13.4%) were not working and 192 (32.5%) were adolescents or young people (soldiers and students). Income was distributed evenly: 172 (34.2%) reported an income lower than the average, 138 (27.5%) reported an average income, and 192 (38.3%) reported an income higher than the average Israeli household income.

The majority of the respondents reported that they usually visit one particular mall (82.7%); on average, they reported making 6.87 visits monthly. The total number of monthly visits ranged from 0 to 31. Most respondents (71%) reported spending more than one hour at the mall per visit, and most go to the mall accompanied by others (44.6% go with friends, 36.7% go with family members and 18.7% go alone).

2.2. Research variables

The research variables were developed by selecting items from previous studies (Bloch et al., 1994; Nicholls et al., 2002; Roy, 1994; Ruiz et al., 2004), and combining them with content analysis of data derived from a qualitative pilot study.[3]

2.2.1. Motivation for mall visits

Eight questions measured the weight of different considerations for visiting the mall, on a Likert scale of 1–4, with **1** = "disagree" and **4** = "very strongly agree".

2.2.2. Activities performed during the visit

Seventeen questions measured different activities engaged in during the visit to the mall, on a Likert scale of 1–4, with **1** = "disagree" and **4** = "very strongly agree".

The choice to use a 4-point Likert scale was based on two considerations: first, it is preferable that respondents make a definite choice rather than neutral one; second, this reduces the social desirability bias (Garland, 1991). This scale is widely used in various fields, such as education (Robertson-Wilson et al., 2007), personality studies (Strelau et al., 1990) and psychiatry (Durieux-Paillard et al., 2006).

As recommended by Henry et al. (2005), a factor analysis was employed in order to create a higher order index based on different sources of information. Since the questionnaire items in the study were not derived directly from a previous study, an exploratory factor analysis was used. The items of motivation for mall visits and activities inside the mall were inserted into the analysis,[4] resulting in five factors (total variance extracted by the five factors = 47%; rotation method: varimax; eigenvalue >1.0), as specified below (see Table 3). Each factor score was created by calculating the average of all items comprising the factor.

2.2.2.1. Factor 1: consumption activities. This factor was composed of three motivations for mall visits—strolling, social meetings and visiting coffee-shops/restaurants (activities that are usually engaged in with other people), and the following activities performed during the visit: gaining fresh knowledge regarding new products and trends, window shopping, performing a routine round at the mall, entering shops and trying on things without actually buying, and engaging in impulse buying.

2.2.2.2. Factor 2: participation in mall-initiated activities. This factor involves visits motivated by activities initiated by the mall, such as children's programs and cultural events.

2.2.2.3. Factor 3: using the mall facilities. This factor involves visits motivated by the use of specific facilities, primarily services (the gym, post office and banks). Since the items in this factor have very low variance, ranging from 7% to 10% for all the four items comprising the factor, a decision was made to eliminate Factor 3 from the analysis (see Appendix B).

2.2.2.4. Factor 4: social activities. This factor includes sitting in public and restricted places (roofs, bathrooms and corridors floors), meeting acquaintances and/or friends, talking to strangers and people-watching.

2.2.2.5. Factor 5: going to see a movie. This factor is self-explanatory.

2.2.3. Visiting patterns

Four questions measured the number of monthly visits to the mall (continuous variable); loyalty to a specific mall and companions on mall visits (categorical variables); and length of stay in the mall (ordinal variable).

2.2.4. Personal details

Six questions measured socio-demographic variables: gender, age, type of employment, income, religious affiliation and family status.

3. Results

3.1. Segmenting customers

To find out if Israeli customers can be divided into distinct groups of customers, a two-step cluster analysis was employed (Table 4). This analysis combines the hierarchical analysis method of Ward with the nonhierarchical k-means clustering procedure, in order to optimize the cluster solutions (Clatworthy et al., 2005). The two-step cluster analysis was most suitable for this study, since it enables the simultaneous analysis of both categorical and continuous variables, along with the study variables of motivation for trip to the mall and mall activities (continuous variables) and visiting patterns (continuous and categorical variables).

The analysis produced four different clusters, differing in factors 1 and 5 (consumption activities and seeing movies) and in all visiting patterns (Table 5 presents the statistically significant levels, compared by group).

The first cluster, representing 17.6% of the sample, scored low in all mall activities except going to movies. The most salient characteristics of this group are their lack of loyalty to any one mall (100% do *not* tend to visit any specific mall) and their low frequency of monthly visits (3.62 on average). Despite their lack of loyalty to any one mall, most members of this group (61%) spend

[2] Though 12 is a very young age for study participants, a growing body of literature indicates the high proportion of adolescents in shopping malls (Haytko and Baker, 2004; Kim et al., 2003; Matthews et al., 2000). For that reason, young participants were included in the analysis.

[3] The qualitative data collection included interviews with 39 visitors to malls, collecting 120 stories of visitors about occurrences in 24 different shopping malls, and on-site observations in four shopping malls. The participants in the qualitative phase did not take part in the present study.

[4] Although the study aimed to distinguish between motivations and activities, the small number of motivation items could not be analyzed on its own. As a result, the motivation items were integrated with the activities items for the factor analysis.

Table 3
Factor analysis results for motivation for mall visits and activities inside the mall.

	Loading	Eigenvalue	% of variance	Alfa Cronbach reliability
Factor 1: consumption activities		2.869	10.63	.75
Acquiring knowledge about products	70.			
Impulse buying	63.			
Routine round	60.			
Strolling	50.			
Going to coffee-shops/restaurants	50.			
Entering shops and trying on things without buying	50.			
Browsing the display windows	48.			
Sitting in coffee-shops/restaurants	46.			
Going for social meetings	42.			
Factor 2: participation in activities initiated by the mall		2.793	10.34	.79
Participating in children's activities	.81			
Going to the mall in order to participate in children's activities	.80			
Participating in a cultural activity	.73			
Going to the mall in order to participate in a cultural activity	.69			
Factor 3: using the mall's facilities		2.417	8.95	.71
Going for the purpose of using a gym	.81			
Using the mall's gym	.80			
Smoking	.48			
Going for the purpose of using public services	.43			
Using public services	.42			
Factor 4: social activities		2.342	8.67	.66
Sitting in restricted areas	63.			
Sitting in public places	61.			
Speaking with strangers	58.			
Watching others	56.			
Meeting acquaintances	41.			
Factor 5: going to see a movie		2.231	8.26	.83
Going to mall to see a movie	.78			
Going to see movies during a visit to the mall	.78			

more than one hour at each visit. This cluster will be termed *Disloyal*.

The second cluster, comprising 29.3% of the sample, scored highest in participation in activities initiated by the mall. This group also frequently engages in consumption activities. The most salient characteristic of this segment is that the majority of its members go to the mall accompanied by family members (74% with family members, 26% alone). All are devoted to a specific mall (100%), which they visit almost twice a week (7.62 monthly visits on average), and each visit lasts over an hour (100%). The members of this group are motivated to use the mall for family bonding; we, therefore, term them *Family Bonders*.

The third cluster, making up 22.9% of the study sample, scored low in all mall activities. The most salient characteristic of this segment is that all (100%) spend less than one hour on average per mall visit. This group shows loyalty to a specific mall (100%), visiting 5.4 times a month on average. The members of this group do not participate in mall activities, and will be termed, after Bloch et al. (1994), *Minimalists*.

The last cluster, representing 30.3% of the study sample, have the highest scores in all mall activities. These customers go to one mall (100%) more than twice a week (averaging 8.75 monthly visits) and spend more than an hour at each visit (100%). They all go to the mall accompanied by friends (100%). Their visits to the mall include consumption activities (which serve also as a way of socializing with others), social activities and going to see movies. Ruiz et al. (2004) call this group the "best customers" of the mall, since they enjoy the life of the mall and make frequent purchases of mall products. Thus, they are termed, after Bloch et al. (1994), *Mall Enthusiasts*.

3.2. Socio-demographic characteristics of groups

Though the groups of customers were defined by the cluster analysis, it is worth examining whether they differ in their socio-demographic characteristics (gender, age, marital status, religious affiliation and employment) as well. Henry et al. (2005) suggest that identification of differences among clusters can create a basis for expansion of the theory. The analyses show significant differences in socio-demographic characteristics (see Table 5 for the statistical analyses).

3.2.1. Disloyal customers

Disloyal customers are evenly divided by gender (47.8% men and 52.2% women), while the majority are single (61.3%) and their average age is 28. The traditional (35.8%) and religious (19.4%) make up a greater portion of this segment than of others. The cluster is split evenly among working people (47.8%) and adolescents and young people (47.8%). In sum, this cluster has higher proportions of men, single people, those who identify themselves as traditional or religious, and adolescents and young people compared to the overall sample.

3.2.2. Family Bonders

Most Family Bonders are married (59%) and female (81%); their average age is 31.5. The distribution of their religious affiliation is similar to the overall study sample. The majority are employed (68.2%). This cluster can be summed up as having higher proportions of women, married and working people compared to the overall sample.

Table 4
Clusters of Israeli mall customers.

	Disloyal	Family Bonders	Minimalists	Mall Enthusiasts
Size of cluster	17.6%	29.3%	22.9%	30.3%
Activity patterns				
Consumption activities	2.22	2.44	2.17	2.65
Participation in activities initiated by the mall	1.47	1.59	1.44	1.43
Social activities	1.6	1.63	1.6	1.73
Going to see a movie	2.3	2.08	2.18	2.47
Visiting patterns				
Number of monthly visits	3.62	7.62	5.39	8.75
Loyalty to a specific mall	0%	100%	100%	100%
Time spent in the mall				
Up to one hour	39%	0%	100%	0%
More than one hour	61%	100%	0%	100%
Mall companions				
Alone	21.7%	26%	34.4%	0%
With family members	36.2%	74%	37.8%	0%
With friends	42%	0%	27.8%	100%
Socio-demographic characteristics				
Gender				
Men	47.8%	19%	34%	26.3%
Women	52.2%	81%	66%	73.7%
Age	28.2	31.6	33	20.5
Marital status				
Married	38.7%	59%	50.6%	8.2%
Single	61.3%	41%	49.4%	91.8%
Religious affiliation				
Secular	44.8%	54.4%	72.4%	54.8%
Traditional	35.8%	24.6%	20.7%	27.8%
Religious	19.4%	21.1%	6.9%	17.4%
Occupation				
Workers	47.8%	68.2%	64%	31.3%
Non-workers	4.5%	17.3%	15.5%	16.1%
Adolescents and young people (students and soldiers aged 18–21)	47.8%	14.5%	20.5%	52.7%

Table 5
Statistically significant levels of comparisons between segments.

Segment variables	Significance level ANOVA for continuous variables and chi square for categorical variables
Mall activities	
Consumption activities	.000 (*p* of ANOVA)
Participation in activities initiated by the mall	.218 (*p* of ANOVA)
Social activities	.168 (*p* of ANOVA)
Going to see a movie	.017 (*p* of ANOVA)
Visiting patterns	
Number of monthly visits	.000 (*p* of ANOVA)
Loyalty to a specific mall	.000 (p of chi^2)
Time spent in the mall	.000 (p of chi^2)
Mall companions	.000 (p of chi^2)
Socio-demographic characteristics	
Gender	.000 (p of chi^2)
Age	.000 (*p* of ANOVA)
Marital status	.000 (p of chi^2)
Religious affiliation	.015 (p of chi^2)
Occupation	.000 (p of chi^2)

3.2.3. Minimalists

The gender distribution of the Minimalists is similar to the study sample, with 66% women. Their average age is 33. The group is split evenly between married (50.6%) and single (49.4%) people; the majority are secular (72.4%) and employed (64%). To sum up this segment, it is older and has higher proportions of married, secular and working people compared to the overall sample.

3.2.4. Mall Enthusiasts

These are mostly young (average age, 20.5), single (92%) and female (73.7%). The distribution of their religious affiliation is quite similar to the study sample. More than half are adolescents and young people (52.7%). This segment has higher proportions of young and single people compared to the overall sample.

4. Discussion

The present study sets three goals: to find out how Israeli mall customers experience malls by segmenting them according to their activities; to examine the relevance of socio-demographic characteristics for each segment; and to compare the present findings about Israeli customers to previous findings about customers from other countries.

The study findings indicate that there are four different groups of customers, Disloyal, Family Bonders, Minimalists and Mall Enthusiasts, with each group experiencing the mall differently. In addition, those segments were found to differ in their socio-demographic characteristics. Other findings suggest that Israeli customers share some similarities with customers from other countries. However, as has been suggested by previous studies (Millan and Howard, 2007; Nicholls et al., 2000), the local culture serves as an important predictor of Israeli customers' behavior.

It was found that two groups of customers were similar in their low engagement in mall activities, namely, the Disloyal and the Minimalists. However, the two groups differ in their visiting patterns and socio-demographic characteristics. Disloyal customers visit the mall the fewest times per month, and do not tend to visit any specific mall. This might be related to the fact that this group has higher proportions of traditional and religious people. Jewish culture denigrates the mall as symbolizing a materialistic outlook and as contrary to the spiritual values of Judaism (Liebman, 1997). It can, therefore, be assumed that as people become more religious, they will be more likely to view malls as places one should avoid as far as possible, going only when there is no other choice. However, studies on the religious sector in Israel suggest that the religious population is increasingly willing to participate and appear in secular consumption spaces (El-Or and Neria, 2004). In light of this, it seems that the group of Disloyals holds an ambivalent position towards malls, with simultaneous attraction and revulsion towards them, reflected in their mall behavior.

The Minimalists, by contrast, seems to be "mission customers", busy people who do not have time to browse in the mall (Ruiz et al., 2004, p. 339). The Minimalists are the oldest group in this study, and most of them are working people. Two thirds of the Minimalists are women and half are married. Since 1960s, many Israeli women have entered the workforce and pursued academic degrees. However, despite the change in women's occupational positions, their gender-based roles in the home have not changed. This situation is familiar to many career women in the western world (Fogiel-Bijaoui, 1999). A similar group was found in Millan and Howard's (2007) study of Hungarian customers. Their Relaxed Utilitarian group was composed mainly of married women who tend to go to the mall alone and stick to preplanned purchases. As such, the Minimalists in this study reflect a segment of career women with very limited free time, who have to juggle the tasks of work and home (Thompson et al., 1990). As a result, their trips to the mall are goal-oriented, short and specific, and their mall experience is functional and commercial.

The Family Bonders manifest the importance of the family in Israel. Members of this group experience the mall as a place for spending leisure time with their families, as a way to strengthen family ties. In this, the Family Bonders are unique to Israeli society, which is very family-oriented. In fact, Israel is the most family-oriented of the western countries (Fogiel-Bijaoui, 1999). Although Israel's national statistics indicate a steadily increasing divorce rate and concomitant decrease in marriages among the Jewish population, the majority of couples establish families, with only a few choosing not to have children (Kulik, 2005). The Family Bonders reflect in their mall behavior the centrality of this value in Israeli culture.

The Mall Enthusiasts are named after Bloch et al. (1994) and correspond to the Enthusiasts (Reynolds et al., 2002), Grazers (Bloch et al., 1994), Committed Customers (Millan and Howard, 2007) and Full Experience Mall Customers (Ruiz et al., 2004). They are a group who engage in high levels of purchasing, various uses of the mall and experiential consumption (Bloch et al., 1994). The Mall Enthusiasts experience the mall as an important place in their lives, where they can go to socialize, acquire new knowledge about products and make purchases.

While in Ruiz et al. (2004), this group was composed primarily of middle-aged, married and full-time working people; in the current study the Mall Enthusiasts are mostly adolescents and young women. The socio-demographic characteristics and behaviors of the Mall Enthusiasts are similar to the Hungarian Committed Customers (Millan and Howard, 2007). The main difference between the two groups is related to purchasing behavior: the Committed Customers mainly make planned purchases (Millan and Howard, 2007), while the present study's Mall Enthusiasts tend to be impulse buyers.[5] The behavior of this group reinforces previous studies indicating that women are much fonder of shopping (Erkip, 2005) or involved in shopping (Nicholls et al., 2002; Wakefield and Baker, 1998) than are men.

To summarize, the findings of the present study demonstrate how segmentation can help us understand customers' preferences and patterns during their trips to the mall, by further validating previous findings about customers' activities. The three categories of customer behaviors—motivations for the trip to the mall, activities performed during the visit, and visiting patterns—were found to be relevant predictors of differences among groups of customers. Future research could examine the relationship between customers' activities and factors, such as mall loyalty and mall satisfaction.

In addition, it was found that culture plays an important role in determining customer behaviors. Two of the groups in this study—the Disloyal and Family Bonders—are unique to Israeli society. Thus, this study contributes to the growing literature dealing with cultural differences among customers around the world (Millan and Howard, 2007; Nicholls et al., 2000; Zhuang et al., 2006). Future study is needed to compare customers from different cultures, so as to understand how cultural context influences mall customers' activities around the world.

4.1. *Managerial recommendations*

The findings of this study demonstrate how different segments of customers use shopping malls. It was found that activities and socio-demographic profiles explain differences among groups of customers. Thus, retailers must take into account the specific characteristics of Israeli society. Mall managers can use this knowledge for their own benefit, primarily concerning the marketing mix offered, and the on-going management of the mall.

4.1.1. *Disloyal*

The Disloyal are the most challenging group for mall managers, since they are not loyal to any mall and visit malls the fewest times a month. However, during their visits, most of them stay more than one hour. The socio-demographic characteristics of this group indicate a high proportion of men and traditional and religious customers. Quite possibly, their low number of visits is due to the malls' marketing mix. Most Israeli malls are similar in their marketing mix and appeal mostly to secular women. Creating retail and entertainment mixes that would appeal to men or to more religious people might increase this group's number of monthly visits and their devotion to specific malls. Previous studies show that spending longer periods of time in the mall raises the chances that additional purchases will be made (e.g., Donovan et al., 1994). Thus, providing exhibitions about cars or hardware appealing to men, or exhibition with Jewish content appealing to the traditional and religious, can attract this group and lengthen their stay.

4.1.2. *Family Bonders*

The Family Bonders are attracted to activities initiated by the mall, probably as a means of bonding with young children and the family in general. The majority of malls today in Israel focus their activities primarily on young children. However, 41% of the Family

[5] Impulse buying is one of the items comprising the Consumption activities Factor, in which the Mall Enthusiasts receive the highest score.

Bonders are single and only 43% are parents of young children. These figures indicate that Israeli mall managers need to reconsider the character of their initiated activities. Offering diverse activities aimed towards families, and addressing consumers of various ages, can assist malls in maintaining the loyalty of this group.

4.1.3. Minimalists

The Minimalists appear to be mission customers, working people with less free time available. This group goes to the mall to accomplish specific tasks and thus probably prefers malls which are easy to access and to navigate. Comprehensible architecture and concentrations of stores of the same kind in certain areas could attract this group of customers and maintain their loyalty. A different way to increase the number of visits to malls by this group can be by initiating specific marketing campaigns, stressing their ability to make short and focused visits.

4.1.4. Mall Enthusiasts

The Mall Enthusiasts are the malls' best customers. For that reason, it is surprising that most Israeli malls do nothing to address this group specifically. Creating specific zones inside the malls that will concentrate brands and entertainment facilities appealing to adolescents and young women, can give malls an advantage in an increasingly competitive industry. In addition, activities initiated by malls directed at this group can lengthen their stay, and so increase their spending. Mall Enthusiasts go to movies more than do the other groups. Reports in the Israeli media (Meirovski, 2007, April 27) indicate that the Israeli mall industry is in the process of removing cinemas from malls and creating separate entertainment complexes. In light of this study finding, it might be worthwhile to reconsider the removal of cinemas from Israeli malls, due to their power to attract young customers. The separation between retail and entertainment might result in a declining presence of youth in malls.

4.1.5. General recommendations

This study revealed that the majority of Israeli customers go to the mall accompanied by others. Since the presence of others influences purchases (Nicholls et al., 2002), retailers should think of marketing mixes and promotional campaigns addressing groups and not individuals. Seating niches in stores and in the mall's public places can lengthen a group's visit, and as a result, the quantity of purchases made on the group visit.

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Appendix A

Table A1.

Appendix B

Table B1.

Table A1
Factor analysis of the two samples.

	Loadings of phone sample	Loadings of mall sample
Factor 1: consumption activities		
Acquiring knowledge about products	.544	.706
Impulse buying	.511	.635
Routine round	.551	.589
Strolling	.606	.492
Going to coffee-shops/restaurants	.658	.266[a]
Entering shops and trying on things without buying	.672	.505
Browsing the display windows	.598	.543
Going for social meetings	.554	.216[b]
Sitting in coffee-shops/restaurants	.624	.258[c]
Factor 2: participation in activities initiated by the mall		
Participating in children's activities	.817	.788
Going for children's activities	.841	.755
Participating in a cultural activity	.604	.760
Going for a cultural activity	.557	.665
Factor 3: social activities		
Sitting in restricted areas	.212	.652
Sitting in public places	.241[d]	.660
Speaking with strangers	.738	.693
Watching others	.718	.399
Meeting acquaintances	.706	.509
Factor 4: Going to see a movie		
Going to mall to see a movie	.837	.830
Going to see movies during a visit to the mall	.872	.810

[a] Loaded on the movie factor (.453).
[b] Loaded on the movie factor (.457).
[c] Loaded on the social activities factor (.431).
[d] Loaded on the movie factor (.478).

Table B1
Variance (in percentages) of respondents who answered "high" and "very high" for mall motivations and activities performed during the visit.

Motivations and activities during the visit	Number of respondents who answered "high" and "very high" (in percentages)
Going for social meetings	55.6
Going for strolling	55
Going to coffee-shops/restaurants	47.3
Going to mall to see a movie	46
Going for children's activities	19.8
Going for a cultural activity	13.9
Going to mall to use public services	10
Going to mall for gym	7.5
Browsing display windows	58.9
Trying on things without buying	51.1
Updating knowledge about new products	48.3
Sitting in coffee-shops/restaurants	46.8
Impulse buying	46.7
Doing routine round	40.4
Going to the cinema	39.3
Choosing special clothes for the visit	37.8
Talking with familiar acquaintances	37
Sitting in public places	18.7
Participation in childrens activities	13.9
Participation in cultural events	12
Watching others	12
Using public services	9.9
Talking with strangers	7.8
Going to the gym	7.2
Sitting in restricted places (roofs, bathrooms, corridors and floors)	6.9

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