Background and Methodology

EYE Corp Media commissioned Edison Research to conduct a custom survey intended to offer marketers and advertisers insight into mall shopper behavior, attitudes and engagement with mall media.

Methodology:

- 855 online surveys
- Teens and adults aged 13+
- Field dates: February 6-16, 2015
- Qualifying criteria: Consumers had to have visited one of the 300+ malls in the EYE portfolio in the 60 days prior to the survey field dates
Key Learnings

- Although mall traffic is heaviest during back to school and winter holiday seasons, January traffic is also high and the rest of the year shows solid and consistent traffic.
- Time spent in the mall per visit has increased (vs. 2009).
- Mall shoppers visit 6-7 stores in an average visit.
- 73% of mall shoppers say they are visiting the mall about the same or more vs. 2 years ago.
- Backlit and digital mall ads are as likely as other media (save for internet and TV) to influence purchase decisions.

Source: EYE Mall Shopper Behavior Study, 2015
Respondent Demos

56% Female
44% Male

<table>
<thead>
<tr>
<th>Age breaks</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>13-17</td>
<td>7%</td>
</tr>
<tr>
<td>18-24</td>
<td>10%</td>
</tr>
<tr>
<td>25-34</td>
<td>18%</td>
</tr>
<tr>
<td>35-44</td>
<td>21%</td>
</tr>
<tr>
<td>45-54</td>
<td>18%</td>
</tr>
<tr>
<td>55-64</td>
<td>12%</td>
</tr>
<tr>
<td>65+</td>
<td>13%</td>
</tr>
</tbody>
</table>

45% are parents

<table>
<thead>
<tr>
<th>Children age breaks</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Under 2</td>
<td>8%</td>
</tr>
<tr>
<td>2-5</td>
<td>12%</td>
</tr>
<tr>
<td>6-11</td>
<td>21%</td>
</tr>
<tr>
<td>13-17</td>
<td>23%</td>
</tr>
</tbody>
</table>

Annual HH income ranges

<table>
<thead>
<tr>
<th></th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Under $50K</td>
<td>38%</td>
</tr>
<tr>
<td>$50K-$74,999</td>
<td>23%</td>
</tr>
<tr>
<td>$75K-$99,999</td>
<td>17%</td>
</tr>
<tr>
<td>$100K+</td>
<td>18%</td>
</tr>
<tr>
<td>Prefer not to answer</td>
<td>4%</td>
</tr>
</tbody>
</table>

Regional Breakdown:

82% Caucasian
10% African-American
8% Hispanic
6% Asian
2% Other

Source: EYE Mall Shopper Behavior Study, 2015
Mall Shopper Attitudes and Behaviors
While the majority of mall visits occur on weekends, there is consistent weekday traffic as well

<table>
<thead>
<tr>
<th></th>
<th>Monday</th>
<th>Tuesday</th>
<th>Wednesday</th>
<th>Thursday</th>
<th>Friday</th>
<th>Saturday</th>
<th>Sunday</th>
</tr>
</thead>
<tbody>
<tr>
<td>Teens</td>
<td>42%</td>
<td></td>
<td></td>
<td></td>
<td>28%</td>
<td>57%</td>
<td>35%</td>
</tr>
</tbody>
</table>

- Teens visit the mall most on weekends
- 65% of teen visits occur on Saturday and Sunday
- Women visit the mall 15% more Monday–Thursday than men
- Consumers 55+ visit 26% more often Monday–Thursday than those under 55

Source: EYE Mall Shopper Behavior Study, 2015
The majority of mall visits occur during the afternoon and early evening

<table>
<thead>
<tr>
<th>Time frame</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Before noon</td>
<td>52%</td>
</tr>
<tr>
<td>12pm-5pm</td>
<td>86%</td>
</tr>
<tr>
<td>5pm-7pm</td>
<td>61%</td>
</tr>
<tr>
<td>After 7pm</td>
<td>40%</td>
</tr>
</tbody>
</table>

- Interestingly, 25-44 year-olds visit the mall most in the evenings
- 52% of their visits are made after 7pm
- For comparison, 42% of teen visits occur after 7pm

Source: EYE Mall Shopper Behavior Study, 2015
Strong mall traffic in January and throughout the summer complement back to school and winter holiday traffic boosts

Source: EYE Mall Shopper Behavior Study, 2015
Consumers spend nearly three hours at the mall each visit.

The average mall visit is 2 hours and 42 minutes, which is the highest mall visit time seen by an EYE study (The EYE Adult Shopper Profile conducted in 2009 found the average mall visit to be 1 hour and 38 minutes).

Source: EYE Mall Shopper Behavior Study, 2015
Mall visitors visit 6-7 stores each visit

- The average consumer visits just 6.1 stores each visit, making it even more important to advertise in the mall space, to ensure yours will be one of the small number of stores consumers visit.
- Teens visit an average of 6.7 stores
- 18-34 visit an average of 7.3 stores

In the EYE Adult Shopper Profile conducted in 2009, we found consumers visited an average of 4 stores per visit. The increase is likely due to the increase in time spent at the mall but still a small number compared to the number of retailers in an average mall of 100-200. Many stores and anchors don’t get a visit.

Source: EYE Mall Shopper Behavior Study, 2015
What do consumers typically shop for at the mall?

- Clothes: 89%
- Fashion Accessories: 67%
- Consumer Electronics: 34%
- Cosmetics: 34%
- Jewelry/Watch: 34%
- Kitchen/Housewares: 33%
- Sporting goods: 29%
- Movie/Entertainment tickets: 27%
- Toys: 27%
- Health/Personal care: 23%
- Other food/Beverages: 21%
- Grocery: 13%
- Office/school supplies: 15%

Source: EYE Mall Shopper Behavior Study, 2015
For which occasions do consumers typically visit the mall?

- Winter Holidays: 77%
- Black Friday: 45%
- Halloween: 24%
- Back to School/College: 35%
- Graduation: 19%
- Father’s Day: 33%
- Mother’s Day: 44%
- Spring Fashion: 35%
- Easter: 25%
- Valentine’s Day: 42%

Source: EYE Mall Shopper Behavior Study, 2015
Holidays and special occasions bring more men and teens to the mall

**Men**
- 48% of men visit the mall to shop for Valentine’s Day (6% more than the average shopper)
- 48% of men shop for jewelry/watch for Valentine’s Day (7% more than the average shopper)
- 49% of men visit the mall to shop for Mother’s Day (5% more than the average shopper)
- 36% of men shop for consumer electronics for graduation (7% more than the average shopper)

**Teens**
- 68% of teens visit the mall to shop for back to school/college (33% more than the average shopper)
- 88% of teens visit the mall to shop for winter holidays (11% more than the average shopper)
- 89% of teens visit the mall to shop for clothes for back to school/college

*Source: EYE Mall Shopper Behavior Study, 2015*
Consumers make a variety of stops on their way home from the mall

<table>
<thead>
<tr>
<th>Location</th>
<th>% visit after the mall</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bank</td>
<td>32%</td>
</tr>
<tr>
<td>Big box store</td>
<td>66%</td>
</tr>
<tr>
<td>Drug store</td>
<td>49%</td>
</tr>
<tr>
<td>Grocery store</td>
<td>66%</td>
</tr>
<tr>
<td>Gym/Health club</td>
<td>24%</td>
</tr>
<tr>
<td>Movies</td>
<td>55%</td>
</tr>
<tr>
<td>Gas station/Convenience Store</td>
<td>70%</td>
</tr>
</tbody>
</table>

Source: EYE Mall Shopper Behavior Study, 2015
There is so much going on at the mall (browsing, dining, socializing), which is why it remains a healthy place to reach consumers.

Consumers visit 6.1 stores each visit, and 73% say they go to the mall to browse. Get the mall-browser traffic by advertising at the mall.

Why do you visit the mall?

- 81% to make a specific purchase
- 73% to browse
- 37% to see a movie
- 35% to dine
- 33% to meet up with someone
- 30% to return a previous purchase
- 12% to visit the hair or nail salon
- 2% for a specific event

Source: EYE Mall Shopper Behavior Study, 2015
How much do consumers spend at the mall in a visit?

Amount Spent per Mall Visit

<table>
<thead>
<tr>
<th>Amount Spent</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>$100+</td>
<td>39%</td>
</tr>
<tr>
<td>$50 - $99</td>
<td>34%</td>
</tr>
<tr>
<td>$20 - $49</td>
<td>24%</td>
</tr>
<tr>
<td>Less than $20</td>
<td>4%</td>
</tr>
</tbody>
</table>

This study finds a 12% increase in the number of consumers who spent $100 or more each mall visit (vs. the EYE Adult Shopper Profile, 2009)

- 59% of consumers plan to keep their in-mall spending about the same next year vs. this year
- 36% of younger consumers (25-34) plan to spend more in the next year

Source: EYE Mall Shopper Behavior Study, 2015
The majority of mall visitors pay for purchases at the mall with Visa or MasterCard

- 54% Visa/MasterCard
- 31% Cash
- 7% Other credit or charge card
- 5% Amex
- 3% Check

Younger consumers are more likely to use cash – 68% of 13-17 year olds and 47% of 18-24 year olds

Source: EYE Mall Shopper Behavior Study, 2015
Mobile use at the mall (and in general) is high

- 81% own a smartphone; 93% of consumers under 45
- 67% own a tablet
- 89% own a smartphone or tablet

How do consumers use mobile devices at the mall?

<table>
<thead>
<tr>
<th>Activity</th>
<th>% of all consumers</th>
</tr>
</thead>
<tbody>
<tr>
<td>To call or text a friend for their opinion</td>
<td>59%</td>
</tr>
<tr>
<td>To look up info on a product or service</td>
<td>58%</td>
</tr>
<tr>
<td>To compare prices</td>
<td>56%</td>
</tr>
<tr>
<td>To use a mobile coupon</td>
<td>54%</td>
</tr>
<tr>
<td>To find reviews of a product or brand</td>
<td>48%</td>
</tr>
<tr>
<td>To access mall info</td>
<td>41%</td>
</tr>
<tr>
<td>To scan a QR code</td>
<td>34%</td>
</tr>
<tr>
<td>To find opinions on social media</td>
<td>33%</td>
</tr>
<tr>
<td>To pay for a product or service</td>
<td>30%</td>
</tr>
</tbody>
</table>

Source: EYE Mall Shopper Behavior Study, 2015
Consumers notice mall ads, and those who do say they are a good way to learn about new products and services

83% of consumers notice eye-level advertising in the mall

<table>
<thead>
<tr>
<th>Agree that mall panel advertising is a good way to learn about new products and services</th>
<th>All consumers*</th>
<th>Consumers 13-34*</th>
</tr>
</thead>
<tbody>
<tr>
<td>54%</td>
<td>57%</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Agree that they are interested in trying products and services advertised at the mall</th>
<th>All consumers*</th>
<th>Consumers 13-34*</th>
</tr>
</thead>
<tbody>
<tr>
<td>43%</td>
<td>46%</td>
<td></td>
</tr>
</tbody>
</table>

*Base: Notice advertising in the mall

Source: EYE Mall Shopper Behavior Study, 2015
Eye-level mall advertising is as likely as other media (save for TV and internet) to influence purchase decisions

How useful are ads from each of the following media types in making purchasing decisions (percentages represent consumers who chose ‘somewhat useful’ or ‘very useful’)?

- TV: 56%
- Internet: 55%
- Eye-level mall advertising: 35%
- Mobile phones: 35%
- Newspapers: 35%
- Magazines: 34%
- Outdoor billboards: 26%
- Radio: 26%

Source: EYE Mall Shopper Behavior Study, 2015
Teenage Mall Shopper Attitudes and Behaviors
Teenager (12-17) Demos

8% of survey population

57% Female
43% Male

82% Caucasian
10% African-American
8% Hispanic
6% Asian
2% Other

Source: EYE Mall Shopper Behavior Study, 2015
Teens spend more time at the mall and visit more stores each visit (vs. the average consumer)

Teens spend an average of 3 hours and 12 minutes at the mall each visit – 30 minutes longer than the average consumer

Teens visit an average of 6.7 stores each visit (vs. 6.1 stores on average)

Source: EYE Mall Shopper Behavior Study, 2015
Top 5 categories teens shop for at the mall

Teens are 17% more likely to shop for sporting goods and 8% more likely to shop for consumer electronics than the average consumer.

- Clothes: 90%
- Fashion Accessories: 69%
- Sporting Goods: 46%
- Consumer Electronics: 42%
- Fragrance: 32%

Source: EYE Mall Shopper Behavior Study, 2015
Teens are 10% more likely to find mall advertising useful (vs. the survey average)

How useful are ads from each of the following media types in making purchasing decisions (percentages represent consumers who chose ‘somewhat useful’ or ‘very useful’)?

- Internet: 58%
- TV: 57%
- Mobile phones: 48%
- Eye-level mall advertising: 45%
- Outdoor billboards: 35%
- Magazines: 29%
- Newspapers: 26%
- Radio: 24%

Base: Respondents age 12-17

Source: EYE Mall Shopper Behavior Study, 2015
Millennial (18-34) Demos

28% of survey population

63% Female
37% Male

59% Caucasian
15% Hispanic
12% African-American
12% Asian

Source: EYE Mall Shopper Behavior Study, 2015
Adult Millennials spend more time at the mall and visit more stores each visit (vs. the average consumer)

Adult Millennials spend an average of 3 hours at the mall each visit – nearly 20 minutes longer than the average consumer.

Adult Millennials visit an average of 7.3 stores each visit (vs. 6.1 stores on average)

Source: EYE Mall Shopper Behavior Study, 2015
Adult Millennials are 19% more likely to shop for consumer electronics and 8% more likely to purchase fragrance and cosmetics than the average consumer.

Source: EYE Mall Shopper Behavior Study, 2015
Adult Millennials are more likely to notice mall advertising and are slightly more interested in trying the products advertised

5% more adult Millennials (88% vs. 83%) notice eye-level mall advertising than the average consumer

2% more adult Millennials (43% vs. 45%) agree that they are interested in trying products and services advertised at the mall

Source: EYE Mall Shopper Behavior Study, 2015
Adult Millennials are 4% more likely to find mall advertising useful (vs. the survey average)

How useful are ads from each of the following media types in making purchasing decisions (percentages represent consumers who chose ‘somewhat useful’ or ‘very useful’)?

<table>
<thead>
<tr>
<th>Media Type</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Internet</td>
<td>66%</td>
</tr>
<tr>
<td>TV</td>
<td>55%</td>
</tr>
<tr>
<td>Mobile phones</td>
<td>49%</td>
</tr>
<tr>
<td>Eye-level mall advertising</td>
<td>39%</td>
</tr>
<tr>
<td>Magazines</td>
<td>36%</td>
</tr>
<tr>
<td>Outdoor billboards</td>
<td>32%</td>
</tr>
<tr>
<td>Radio</td>
<td>27%</td>
</tr>
<tr>
<td>Newspapers</td>
<td>26%</td>
</tr>
</tbody>
</table>

Base: Respondents age 18-34

Source: EYE Mall Shopper Behavior Study, 2015
Mom Shopper
Attitudes and Behaviors
Mom Demos
(at least one child under 18)

56% of survey population

8% 18-24
27% 25-34
41% 35-44
20% 45-54
3% 55-64
1% 65+

59% Caucasian
15% Hispanic
12% African-American
12% Asian

Source: EYE Mall Shopper Behavior Study, 2015
Moms spend more time at the mall, visit more stores and spend more money each visit (vs. the average consumer)

Moms spend an average of 3 hours and 12 minutes at the mall each visit – 30 minutes longer than the average consumer

Moms visit an average of 6.7 stores each visit (vs. 6.1 stores on average)

Moms are 4% more likely to spend $100+ each mall visit than the average consumer

Source: EYE Mall Shopper Behavior Study, 2015
Top 5 categories moms shop for at the mall

Moms are 22% more likely to shop for cosmetics, 15% more likely to shop for fragrance and 13% more likely to shop for fashion accessories than the average consumer.

Source: EYE Mall Shopper Behavior Study, 2015
Moms are more likely than the average consumer to believe mall advertising is informative

82% of moms notice eye-level mall advertising – 1% fewer than the average consumer

However, 63% of moms who notice mall ads believe that mall advertising is a good way to learn about new products and services – 9% more than the average consumer

2% more moms (43% vs. 45%) agree that they are interested in trying products and services advertised at the mall

Source: EYE Mall Shopper Behavior Study, 2015
Moms are 8% more likely to find mall advertising useful (vs. the survey average)

How useful are ads from each of the following media types in making purchasing decisions (percentages represent consumers who chose ‘somewhat useful’ or ‘very useful’)?

- Internet: 64%
- TV: 61%
- Mobile phones: 48%
- Eye-level mall advertising: 43%
- Magazines: 38%
- Outdoor billboards: 33%
- Radio: 33%
- Newspapers: 32%

Base: Moms of children under 18

Source: EYE Mall Shopper Behavior Study, 2015
Male Shopper
Attitudes and Behaviors
Male Demos

44% of survey population

- 10% 13-17
- 7% 18-24
- 18% 25-34
- 23% 35-44
- 19% 45-54
- 12% 55-64
- 11% 65+

77% Caucasian
- 9% Hispanic
- 8% African-American
- 4% Asian

Source: EYE Mall Shopper Behavior Study, 2015
Men spend less time and visit fewer stores each visit than the average consumer, so you have even less time in which to reach this audience.

Men spend an average of 2 hours and 36 minutes at the mall each visit – 6 minutes less than the average consumer.

Men visit an average of 5.9 stores each visit (vs. 6.1 stores on average).

Source: EYE Mall Shopper Behavior Study, 2015
Top 5 categories men shop for at the mall

Men are 7% more likely to shop for consumer electronics and 8% more likely to shop for sporting goods than the average consumer.

Source: EYE Mall Shopper Behavior Study, 2015
Hispanic Shopper Attitudes and Behaviors
## Hispanic Demos

<table>
<thead>
<tr>
<th>Gender</th>
<th>Percentage</th>
<th>Age Group</th>
</tr>
</thead>
<tbody>
<tr>
<td>Female</td>
<td>63%</td>
<td>13-17</td>
</tr>
<tr>
<td>Male</td>
<td>37%</td>
<td>15% 13-17</td>
</tr>
<tr>
<td></td>
<td></td>
<td>15% 18-24</td>
</tr>
<tr>
<td></td>
<td></td>
<td>19% 25-34</td>
</tr>
<tr>
<td></td>
<td></td>
<td>15% 25-34</td>
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<tr>
<td></td>
<td></td>
<td>15% 25-34</td>
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<tr>
<td></td>
<td></td>
<td>15% 35-44</td>
</tr>
<tr>
<td></td>
<td></td>
<td>15% 45-54</td>
</tr>
<tr>
<td></td>
<td></td>
<td>6% 55-64</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2% 65+</td>
</tr>
</tbody>
</table>

Source: EYE Mall Shopper Behavior Study, 2015
Hispanics spend more time but visit fewer stores each visit than the average consumer.

Hispanics spend an average of 2 hours and 54 minutes at the mall each visit – 12 minutes longer than the average consumer.

Hispanics visit an average of 5.9 stores each visit (vs. 6.1 stores on average).

Source: EYE Mall Shopper Behavior Study, 2015
Top 5 categories Hispanics shop for at the mall

Hispanics are 17% more likely to shop for consumer electronics and 11% more likely to shop for fragrance than the average consumer.

Source: EYE Mall Shopper Behavior Study, 2015
Hispanics are more likely to notice and agree that mall advertising is informative

88% of Hispanics notice eye-level mall advertising – 5% more than the average consumer

64% of Hispanics who notice mall ads believe that mall advertising is a good way to learn about new products and services – 10% more than the average consumer

Source: EYE Mall Shopper Behavior Study, 2015
Hispanics are 10% more likely to find mall advertising useful (vs. the survey average)

How useful are ads from each of the following media types in making purchasing decisions (percentages represent consumers who chose ‘somewhat useful’ or ‘very useful’)?

- Internet: 54%
- TV: 52%
- Mobile phones: 47%
- Eye-level mall advertising: 45%
- Magazines: 37%
- Newspapers: 33%
- Outdoor billboards: 29%
- Radio: 21%

Base: Hispanics

Source: EYE Mall Shopper Behavior Study, 2015
High Income Shopper
Attitudes and Behaviors

Mall Shopper Behavior Study
# High Income Demos
(annual household income $100K+)

- 18% of survey population

<table>
<thead>
<tr>
<th>Gender</th>
<th>Percentage</th>
<th>Age Group</th>
</tr>
</thead>
<tbody>
<tr>
<td>Female</td>
<td>50%</td>
<td>13-17</td>
</tr>
<tr>
<td>Male</td>
<td>50%</td>
<td>18-24</td>
</tr>
<tr>
<td></td>
<td></td>
<td>25-34</td>
</tr>
<tr>
<td>Caucasian</td>
<td>79%</td>
<td>35-44</td>
</tr>
<tr>
<td>Asian</td>
<td>21%</td>
<td>45-54</td>
</tr>
<tr>
<td>Hispanic</td>
<td>8%</td>
<td>55-64</td>
</tr>
<tr>
<td>African-American</td>
<td>6%</td>
<td>65+</td>
</tr>
</tbody>
</table>

Source: EYE Mall Shopper Behavior Study, 2015
High income consumers visit fewer stores each visit than the average consumer and they spend more money, so it is crucial to ensure your store is one of the few they visit (and spend money at)

High income consumers spend an average of 2 hours and 48 minutes at the mall each visit – 6 minutes longer than the average consumer

High income consumers visit an average of 5.7 stores each visit (vs. 6.1 stores on average)

High income consumers are 15% more likely to spend $100+ each mall visit than the average consumer

Source: EYE Mall Shopper Behavior Study, 2015
High income consumers are 8% more likely to shop for kitchen/housewares than average, and are the only demo group with kitchen/housewares in their top 5.

<table>
<thead>
<tr>
<th>Category</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clothes</td>
<td>90%</td>
</tr>
<tr>
<td>Fashion Accessories</td>
<td>64%</td>
</tr>
<tr>
<td>Kitchen/Housewares</td>
<td>41%</td>
</tr>
<tr>
<td>Consumer Electronics</td>
<td>38%</td>
</tr>
<tr>
<td>Cosmetics</td>
<td>38%</td>
</tr>
</tbody>
</table>
Wrapping Up
The findings of this study point to the sustained health of the mall, and the consistent visiting behavior of mall shoppers.

It is important to have your message seen by shoppers on their path to purchase when they are browsing (73%), socializing (33%) and shopping at the mall.

35% of consumers find mall ads useful in helping them make purchase decisions. Make sure your message is influential in guiding consumers to the 6-7 stores they will visit by advertising at the mall.

Source: EYE Mall Shopper Behavior Study, 2015
Thank You!