

# Center *of* Attraction

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LANDOR ASSOCIATES

**W**estfield USA thought everyone who shopped in its malls was its customer—from the 16-year-old skate-rat to the 60-year-old grandmother. In a way, they were right.

Westfield's shoppers were, in fact, like those of every mall in America—a random mix of teenagers hanging out; seniors shopping for grandchildren; office workers having lunch; moms running errands; and every other type of person you might imagine.

The surprise was, Westfield's smallest group of customers actually turned out to be the strongest foundation for building its brand identity and its business. It took the industry's first-ever segmentation of mall shoppers to uncover that insight, however.

Based in Australia, Westfield is one of the largest shopping-center real estate development and management companies in the world. Following a re-branding effort in Australia, Westfield turned its attentions to its brand identity in the United States.

We began by developing a thorough quantitative and qualitative research study that examined both the demographic and psychographic drivers of propensity to shop. This allowed us to get at the deeper motivations

of Westfield's shoppers so we could prioritize them.

Every segmentation study begins with empathy for every imaginable segment that might exist in a category. We developed a total 11 segments from what we called the *Roaming Tribesmen* (who need to shop with others to validate their choices and themselves) to the *Multi-Tasker* (who spends very little time in the centers but hits multiple stores with a strategic

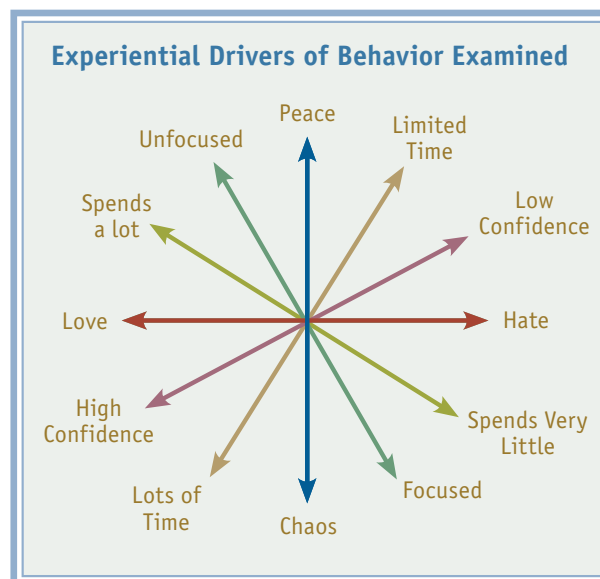
precision to optimize effort and time).

Based on these hypothetical segments, we derived the key measures we would use to understand these shoppers and determine their relevance to the future of Westfield's brand identity.

We then formulated a questionnaire based on these 11 hypothetical segments that would speak to a multitude of complex attitudes and needs. This questionnaire narrowed down these hypothetical

segments to a more manageable number and eventually led us to our ultimate, target shopper.

At this stage, we knew we would probably prefer a segment that leaned more towards loving shopping than hating it; that spent more money—and more time—shopping than less. What we couldn't predict was how these characteristics would interact with their focus, their sense of self, their confidence in what they purchased or their general demeanor prior to shopping, while shopping, and after shopping.



# Westfield USA finds its identity in just two kinds of shoppers

A total of 1,800 online questionnaires were completed in Westfield's key zip codes. We wanted to know: size of group; average spend, shopping frequency; variety of stores shopped; types of stores shopped; desired experience; influence over others; level of shopping enjoyment; role of brand; and how closely individuals would align with the Westfield culture.

Based on the responses, we discovered seven distinct segments. It may seem logical to assume that we would target the largest group of guests from among the seven segments, but that's not what we did.

Instead, we went back to the three things we had identified as the most important: shoppers who love to shop; shoppers who shop a lot; and shoppers who spend a lot when they shop. Only two segments remained that fit this designated criteria: the *Navigator* (inwardly directed when shopping and motivated by curiosity, need and passion) and the *Social Seeker* (outwardly directed when shopping and looks to others for validation and motivation).

Interestingly, the *Navigators* only comprised eight percent of the shopping population but represented 20 percent of the buying power. However, when combined, *Navigators* and *Social Seekers* represented 52 percent of the buying power at Westfield's malls.

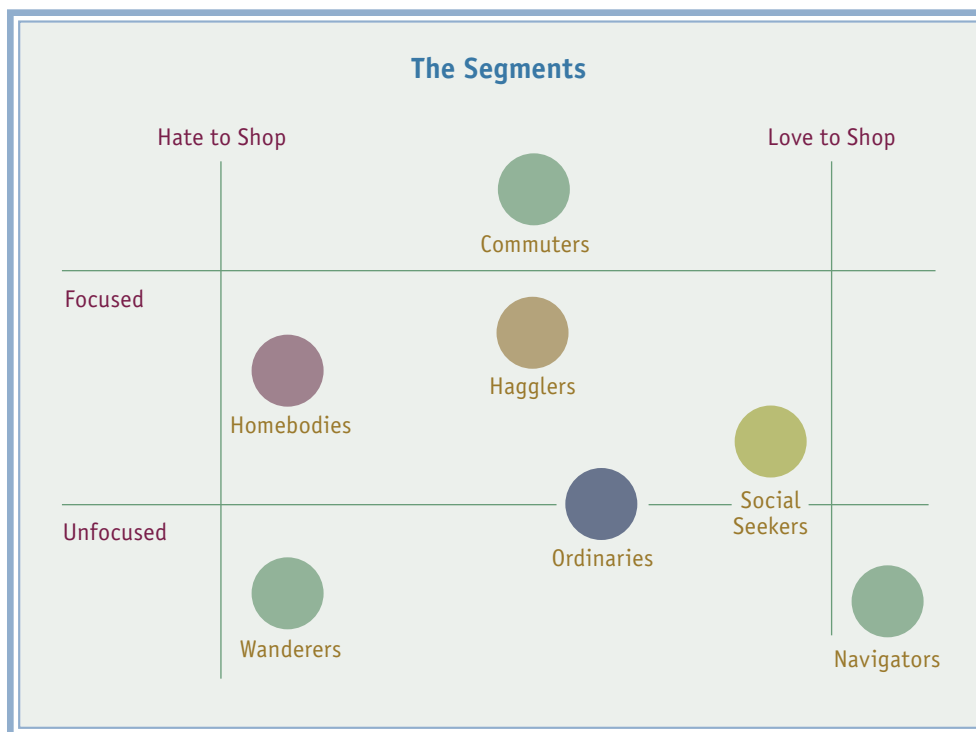
## ETHNOGRAPHIC ALGORITHMS

This quantitative research set the stage and created an outline. But to really get at the heart and soul of the segments, it was critical to do ethnographic research as well. Using an algorithm derived from the segmentation survey, we recruited men and women who met the *Social Seeker* and *Navigator* profiles.

In three markets, we conducted 16, three-hour interviews with these two segments to understand more fully how Westfield, as a brand, was interpreted. We also wanted to understand the subtleties of who these segments really were and how they were different from each other so we could better prioritize them.

We toured their homes, met their families, drove with them around their neighborhoods and went shopping with them at various Westfield centers and at their competitors. What we learned was, while buying power may have cinched the *Navigator* as the bull's-eye target customer for Westfield's future branding, it was really what we learned about them when we spent time with them that made the difference.

As noted, *Navigators* were much more inwardly directed than the *Social Seekers*, who looked elsewhere for approval. Secondly, they were the early adopters of the mall culture and everyone—including



the *Social Seekers* — looked to them for direction. And finally, if we used an appropriate voice and tone for the *Navigator* it would still appeal to the *Social Seeker* — but not the other way around.

We also discovered there were certain compelling similarities between the two segments: 1) They are both “expert” shoppers — it’s their territory and it continually engages them; 2) They are active and involved people — they shop a lot, but they live a lot, too; 3) They need an excuse to go to the mall — but once there they wander with a sense of purpose; and 4) Shopping revitalizes them — gives them a sense of accomplishment and offers a world of discovery.

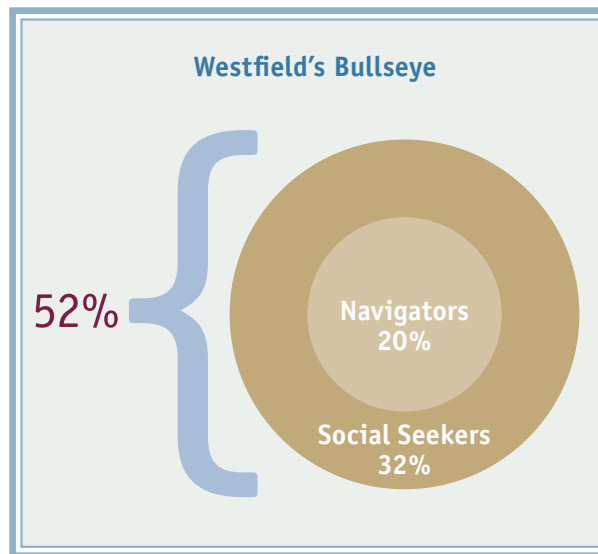
However, there were also some challenges in looking at the two segments. Although they had similarities in their love of shopping they had very significant *attitudinal* differences: The *Navigator* is highly independent, very organized, driven by her own impulses and creativity, while the *Social Seeker* is significantly less confident about her choices and looks for constant approval. She is less organized and is always reaching out for companionship.

#### INSPIRING THEIR JOURNEY

In combination, this information allowed us to determine key attributes that should be communicated at a Westfield mall. These included a sense of security and consistency; respect for their shopping expertise; the feeling of being an insider (ahead of the curve); the presence of enabled discovery; reward for their Westfield loyalty; and the opportunity to shop alone or to feel unrestrained.

We determined that if we chose the *Social Seeker* as our core shopper, we would isolate the *Navigator*, who feels superior to the *Social Seekers*’ need for approval.

However, if we chose the *Navigator* as our core, our tone would be that of an “expert mall” speaking to the “expert shopper.” It would be about inspiring their journey, not directing it. This would be a natural



message for the *Navigator* to accept and a uniquely complimentary one for the *Social Seeker* to hear.

With the *Navigator* as the core target, the Westfield USA organization has embraced this segmentation and used it to inform its loyalty program as well as its sales strategies and leasing objectives.

Westfield’s loyalty program questionnaire

is based on the algorithm used in the segmentation work, and loyalty-program members are segmented into *Navigators*, *Social Seekers* and *Others*, with messaging driven based on each segment. In addition, the leasing team now uses *Navigator* and *Social Seeker* profiles in all presentations to both current and prospective retailers.

Armed with new insight into the attitudes and behaviors of its key shoppers, Westfield USA became empowered to make smarter, on-brand business decisions that now drive how the organization operates internally and how it approaches customers.

Now only a few months into implementing strategies based on the research findings, Westfield has laid a strong brand foundation and has positioned itself as a leader in creating relevant differentiation in the largely uncharted world of shopping mall brands. ■



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