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Item Type	article;event
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Download date	2026-03-14 20:39:16
Link to Item	https://hdl.handle.net/20.500.14394/48489

THE 'MALLING' OF MAIN STREET

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ABSTRACT

King Street, the heart of the historic downtown Charleston, South Carolina, is a charming and highly successful retail area. The merchant mix of the street over the past few decades has trended away from local merchants and area-specific goods and services, to instead today be home to numerous national chain stores selling the same merchandise tourists find at home and locals can find in the city's suburban malls. This short paper reports findings of an empirical survey-based study that explored the views of both Charleston residents and Charleston tourists regarding the changing nature of downtown Charleston. The results are of interest to tourism officials and city planners for any historic destination as they consider the future of their locales as they face similar changes in their community.

KEY WORDS: retail development, merchant mix, gentrification, heritage tourism

INTRODUCTION

The research that follows relates to downtown Charleston, South Carolina and its historic King Street shopping district. The study extends a qualitative review by Litvin and Jaffe (2010) that considered the impact of national chain stores on King Street. National chains now represent 40% of the merchants and 52% of the retail frontage along King Street, with merchants such as The Apple Store, Gucci, Pottery Barn, Tommy Bahama, and Williams-Sonoma; each opened relatively recently in a storefront previously occupied by one or more local merchants. Despite this significant chain store presence, the consensus view of Litvin and Jaffe's (2010) interview subjects, a range of Charleston tourism industry stakeholders, was that the current merchant balance was healthy. Their qualitative work calls, however, for an in-depth quantitative follow-up study to measure the views of both the tourists who visit and the locals who shop in downtown Charleston. The findings of such a study, discussed below, are important, not just for Charleston government officials and the local tourism industry, but for any historic tourism community as it considers its own future downtown developmental plans, issues and concerns.

Two streams of literature inform the research. The first relates to Destination Maturation Models. The second relates to retail tenant mix, a topic of significant interest in the real estate literature. From these, we learn that destinations are fragile and that without control are likely to reach stages of decline (see Snepenger et al.'s (1998) Downtown Tourism Lifecycle Model for an overview and an example that closely parallels King Street's recent development), that the loss of local flavor should be of significant concern as a contributing factor leading to decline,

and that tenant mix is key in keeping a destination attractive; providing locals a reason to shop downtown and tourists a reason to visit.

RESEARCH METHOD

Resident Study

Data were gathered from local Charleston area residents. Presidents of 96 neighborhood associations were contacted by e-mail and asked to forward a link to an on-line survey to their resident constituents. A total of 169 responses were received. Mean respondent age was 41. The sample was predominantly female (66%) and most respondents indicated their job status as white-collar professionals (75%). One third (34%) lived downtown and the average respondent had resided in Charleston 19 years. While the sample was dominated by women and professionals, such respondents were well suited to provide informed responses to the survey enquiries.

Tourist Study

A modified mall-intercept approach was utilized to collect tourist data. Adults walking on King Street were approached and asked to participate in the study. Those agreeing to do so were pre-qualified by determining that their home was outside the Charleston area. The exercise continued until 200 responses were collected. Respondents came from 36 states and five foreign countries. There were 138 (69%) females, a skew consistent with the resident sample. Age was not asked of the visitors. Respondents were predominantly repeat Charleston visitors (n=141, 70%), a percentage similar to that noted in an earlier Charleston study that captured tourists on King Street (Litvin 2007).

KEY FINDINGS

Resident Study

The median number of monthly downtown visits was four, and residents were generally very pleased with their main street. When asked to evaluate King Street using a 'school grading' system, 88% awarded a grade of 'A' or 'B.' Visitation frequency and satisfaction meshed well, as those who graded King Street 'A' or 'B' visited King Street an average of 7.8 (SD=8.1) times per month, while the few who gave lower grades visited far less frequently (3.6 times, SD=5.4).

In response to the question that asked what they 'liked most' about King Street, the number one response was the *variety of stores and restaurants* (18.0 on 100 point scale; the top three responses were captured and weighted, with three points for a first mention, two for a second and one for a third). Following *variety*, respondents most often pointed to the *shopping experience* (11.9), the *character* of King Street (11.4), its *restaurants and bars* (11.0), and *history and architecture* (7.8). Most germane to this study were the relatively few residents who listed the area's *local independent stores* as a 'most liked' feature (7.8). With regard to what aspect of King Street they 'most disliked,' the majority of respondent complaints targeted *parking and traffic* (42.3) and *crowded sidewalks* (38.2), with very few comments pointing to issues related to either the *number of chain stores* or the *lack of local merchants* (combined = 9.8).

When asked the names of their *favorite* King Street stores and the *last* King Street stores they had visited, the ‘favorite store’ breakdown reflected a slight preference for local/regional merchants (52%). However, this preference was not reflective of the residents’ shopping habits, as the majority (54%) of their most recent visitations were to national chains, a share that far exceeded the 40% national chain store mix on King Street.

Tourist Study

When asked which shops they most enjoyed, a strong tourist preference for King Street’s national chains (62% national chains versus 38% local merchants) was noted. When asked to estimate the percentage of time they shopped local versus national chain stores, the skew was not quite as large, with 52% spent in the chains. A question, related to merchant mix, however, reflected an attitude incongruent with the above, as 72% of tourists commented on there being too many chain stores (or the need for more local merchants). When asked to assign a school grade to King Street, despite the observations of most that there were too many chains, tourists were very pleased with their downtown experience, with 93% grading King Street ‘A’ or ‘B’; resulting in a 3.3 ‘GPA’, slightly higher than the 3.1 ‘GPA’ assigned by the local residents.

DISCUSSION AND CONCLUSION

Sustainability is key to a city’s success. Sustainability, though, is highly contingent upon a city’s forward vision. For an historic city, this vision mandates the identification and preservation of those assets that establish and distinguish the city’s unique identity (Robertson 1995). This does not happen by chance. Finding a balance is difficult. Li (2003) commented that the fundamental issue is the inherent contradiction between the desire to conserve heritage and the inevitable change associated with the developmental process. Too much development, Li noted, and the city is in danger of losing its cultural foundation. Too little, and business opportunities are forgone. Today’s Charleston is a very attractive tourism destination and a quality place to call home. But achieving this has been accompanied by a changing merchant mix, with local stores being replaced by the same national chains that residents find in suburban malls and visitors find available in their hometowns. When considering King Street’s sustainability, in light of the warnings offered by models such as Snepenger et al.’s (1998) Downtown Tourism Lifecycle Model, it would seem the city’s changing merchant mix should be of concern. The Litvin and Jaffe (2010) qualitative study findings, however, found no evidence of such concern, and the current quantitative extension of their work reinforces those findings. Charleston residents and tourists both indicate a strong liking of King Street the way it is, their actions support this attitude...and based upon King Street’s low retail vacancy rate, merchants and landlords seem equally as pleased.

But how about the future? This is where the answer becomes somewhat less defined, as, despite the high satisfaction scores and indications that the current balance is appropriate, 37% of locals and 72% of tourists indicated they would like to see, *in the future*, more local King Street merchants. So, while happy with today’s merchant balance, their preference for the future is a reversal of the current trend. Forty years ago King Street was divided roughly 80% local versus 20% national retailers. Purely as speculation, as no research was conducted to measure these

attitudes, it is likely that in the ensuing years some residents would have been concerned by the city's gradual loss of its local merchants. But likely offsetting this concern was the satisfaction of watching King Street develop into a premier shopping destination. As the national chain store rate increased from 20% to 30% and again from 30% to 40%, the overriding sentiment may well have been, as it is today at roughly an even split, that the then current merchant balance was fine and that the status quo was appropriate and healthy. It seems intuitive, however, that if deep-pocketed national chain stores, willing and able to pay King Street's escalating rental rates, continue to displace the city's local merchants that a tipping point will eventually be reached. What if in a decade or two 60%, 70% or even 80% of King Street frontage is held by national chain stores? Will residents still find the balance attractive? Will tourists still desire to visit the city to shop? Will a simulacrum of an historic Charleston main street suffice? Or will both residents and tourists abandon the street, as Snepenger et al's (1998) model forewarns? Plog (1991) advises tourist destinations to avoid the 'mall' of their commercial district, i.e. becoming a place that the traveler can no longer distinguish from any other as they all begin to look and feel distressingly similar. Could such a fate await Charleston if the tenant balance continues to tip in favor of the national chains? This will be an interesting story that destination planners, CVBs, and tourism officials in any historic destination should follow closely.

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