



Internet **Home** Alliance

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**Mobile Worker Pilot**  
Final Report

January 15, 2005

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## Background & Methodology

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## Background & Objectives

The U.S. mobile and remote workforce is growing, driven by both business necessity and technological innovation. According to IDC, the total U.S. mobile and remote worker population is expected to grow to 55.4 million by 2004, a steady 9% compound annual growth rate since 2000. From globetrotting executives to work-at-home parents to field technicians, the number and variety of mobile workers are driving demand for continuous application access and new types of work environments.

With this audience in mind, Alliance members built and equipped a work space designed specifically to appeal to professionals who need a comfortable space to be productive and get work done while away from the office and the home office. Connection Court was developed by Alliance members Cisco, Herman Miller, IBM, Panasonic, Cushcraft, HP, Microsoft, and Taubman Centers. It was installed at The Shops at Willow Bend in Plano, Texas. Connection Court opened in May, 2004 and is slated to be in operation for one year.

The main purpose of the study was to determine the appeal of the Connection Court site at among mobile and remote workers and to characterize the business opportunity for this uniquely professional alternative work setting.

Specific objectives included:

- Profile Connection Court users along various dimensions, including demographics, employment, degree of work mobility, Willow Bend visit habits, and usage of wireless Internet;
- Understand how people use Connection Court and what activities they engage in;
- Evaluate the appeal of the concept in general and the appeal of the site in particular, in terms of aesthetics, comfort, potential for productivity, and available services;
- Determine what effect Connection Court has on frequency of visits to the mall;
- Define and characterize Connection Court's alternative work setting competitors (a home office, a coffee shop, a library, the airport, etc.) and compare Connection Court to these alternatives; and
- Gauge (roughly) demand for Connection Court among the mobile worker target audience, and identify preferences for payment.

# Methodology

A variety of methodologies was employed in the course of this research which ran from June through September, 2004.

## *Web Surveys*

People who wanted to get Web access at Connection Court registered at The Shops at Willow Bend Web site. We collected their email addresses periodically, and sent registered users an email invitation to complete the survey. Plus, a link that popped up during their Web session encouraged users to click the link and take the survey.

In order to encourage participation, those who completed the survey were entered in a drawing to win one of 20 prizes, which consisted of products/certificates provided by Herman Miller, Cisco, and Taubman.

In mid-July, we launched a revised survey with some additional questions. By mid-September, a total of 230 individuals had completed either the first or second Web survey, out of 1239 registered users. This results in a very respectable “hit rate” of 19% of registered users. A small number of respondents (26 of 230) was employed by a shop or restaurant within the mall. For the most part, this report addresses the behavior and opinions of mall visitors rather than people who work within the mall.

## *Qualitative Research*

The qualitative research included three studies. Registered users who completed the Web survey were asked if they would take part in focus groups and/or ethnographic research. Zanthus then contacted and screened willing participants.

On July 15, Zanthus conducted two focus groups at the management offices at Willow Bend. The sessions were conducted with Connection Court users and with people whose responsibilities include managing staff who fit the Mobile Worker profile. Connection Court users received \$100 and managers received \$150 for their participation.

# Methodology

Connection Court users were screened to meet the following criteria:

- Employed in a position which allows them some or complete freedom to choose where they do their work;
- Use a PC for at least 30% of the work day; and
- Have used Connection Court and were likely to use it again on their next visit to The Shops at Willow Bend.

Area managers were screened to ensure they:

- Manage staff members as part of their work responsibilities;
- The staff they manage use a PC for at least 30% of their work day, participate in face-to-face meetings, and have some or complete freedom to choose where they do their work; and
- They consider Connection Court to be an acceptable place for their staff to do work if they chose to.

Additionally, we conducted ethnographic observations during August with mobile workers/Connection Court users in the Dallas metropolitan area. The ethnographic subjects were observed over two business days in their daily work habits and patterns. We were assisted by Zanthus-trained graduate students of sociology and anthropology from local universities. At the completion of the observation, a short interview was conducted with each subject regarding his or her use of 3<sup>rd</sup> places and their impressions of Connection Court. A total of seven ethnographic subjects were observed. Each received a \$400 gift check.

Lastly, 16 in-depth interviews were conducted over the course of the summer with users of Connection Court. The graduate students approached individuals while they were using Connection Court, and conducted informal interviews in order to learn their impressions in a format which allowed for greater nuance than a Web survey. These interviews lasted approximately 25 minutes and participants received a gift of \$10 in cash.

There are three research reports for the Mobile Worker Pilot. This report focuses on findings from the Web survey research. The Focus Group Topline addresses the focus groups, and the Ethnographic Research report is devoted to the ethnographic and in-person interview research.

## Executive Summary

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- **Key Findings**
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# Executive Summary

## Connection Court User Profile

The typical Connection Court user is a younger man working in computers, sales, or as a business owner or executive. He visits The Shops at Willow Bend at least once a month. He is a mobile worker with the freedom to choose where he works. He spends about half his work time in a standard office, and the other half is spent working at home, while traveling, or in some other location away from the office. A frequent user of wireless Web access at coffee shops around town, he averages about five wireless sessions per month. He lives about 10 miles from The Shops at Willow Bend. Most often, he uses Connection Court for business rather than personal tasks, and he goes by himself rather than with others. While at the mall, he might browse or get something to eat before or after using Connection Court.

## How People Use Connection Court

Users were asked what activities they engaged in at Connection Court, and what they considered the *primary reason* for the visit. Nearly all users looked at Web sites and checked their email. Email is the primary reason given for using Connection Court. One-third also did work on a PC (something other than Web and email), and the same number had refreshments. Just a handful (14%) made use the print/copy/scan abilities, and roughly the same number (12%) said they did work with others at Connection Court.

## User Evaluations of Connection Court

Connection Court did an excellent job meeting the needs and desires of the mobile worker target audience. Users gave it essentially rave reviews to the space for being comfortable, conducive to individual and collaborative work, and for offering the right vibe or atmosphere for being productive. Eight in ten said they would recommend it to someone they know; this is strong evidence that Connection Court fulfilled the ideal among this audience.

71% of users predicted that Connection Court would prompt them to come to The Shops at Willow Bend at least one additional visit per month. And an astounding 27% expected to come to Willow Bend four times per month more often than they visited before Connection Court.

It's clear that the mobile worker target audience likes Connection Court very much, both as a concept and in its execution at The Shops at Willow Bend.



# Executive Summary

## Connection Court and Alternative Work Settings

Users were asked whether they would rather go to Connection Court or to another work place if the two sites cost about the same to use. Connection Court was preferred over the coffee shop (by 62% of those who did work in coffee shops), the hotel (by 52%), and the airport (52%).

## Pricing Connection Court

All indications are that very few mobile workers would pay to use Connection Court. About two-thirds expected that it would be offered at no charge after the pilot period.

The rationale for a free Connection Court generally falls into two categories:

- “I can get free wireless all over town. Why should I pay for it here when I can just go someplace else or do it at home?”
- “It’s an amenity that brings people like me to the mall, where I spend money that I would otherwise spend in some other location. I’m paying with my mall purchases.”

About 5% of mobile workers said they would pay to use Connection Court at either \$4, \$6, or \$8 an hour. If 48% of U.S. workers have some freedom to choose where they work, the audience for Connection Court at any of these prices would be about 2.4% of U.S. workers.

If they had to pay, most Connection Court users would like to make a required minimum refreshment purchase rather than pay an hourly fee.

## Conclusions and Recommendations

Respondents were voluminous in their praise of Connection Court (See “Connection Court Users Have Their Say), and in their thanks to The Shops at Willow Bend for the amenity. But as one user put it, “Wireless access is the water fountain of the new millennium... charge the retailers a fee on the theory that it draws traffic for them.”

# Executive Summary

## Conclusions and Recommendations

Connection Court could be built in a shopping mall or other enclosed public space (an airport for example), or it could be designed as a stand-alone location, as part of a strip mall or as a downtown storefront site. The location of the space is inextricably tied to how people perceive the space and whether they use it, and how they use it. We can't say with certainty how successful Connection Court would be in other settings because the setting itself is such an integral part of the experience.

In the focus groups, respondents said they would like Connection Court to be as ubiquitous - and as accessible - as Starbucks (like a Connection Court next to every Starbucks, as more than one person suggested), and they thought they might use Connection Court more if it were in a location where it was easier to get in and out (like in a strip mall). But, they also said that while they liked the professional environment and amenities, they weren't necessarily willing to pay for them when they had wireless access to email through free hot-spots or through a wireless phone account. What Starbucks offers - and Connection Court could as well - is a reliable, uniform experience, where expectations are nearly always met. This is something you can't get for free at an independent coffee shop. The great majority of users in the mall said they wouldn't pay to use Connection Court. Whether they would pay for having reliable wireless access and a quiet business-like environment in another setting remains to be seen.

Based on the user comments in the Web survey, Connection Court generated quite a bit of good will for Willow Bend. Coupled with the fact that 71% of users expected they would increase their Willow Bend visits by at least one per month, we recommend that Connection Court be a permanent fixture in the mall, and offered at no charge. Respondents considered it a mall amenity - and a gratifyingly innovative one - rather than a for-pay destination.

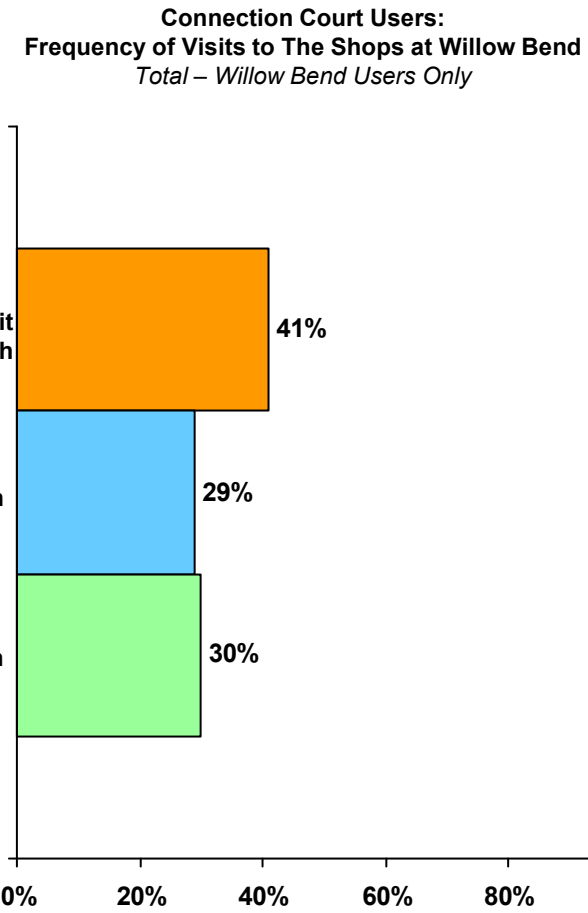
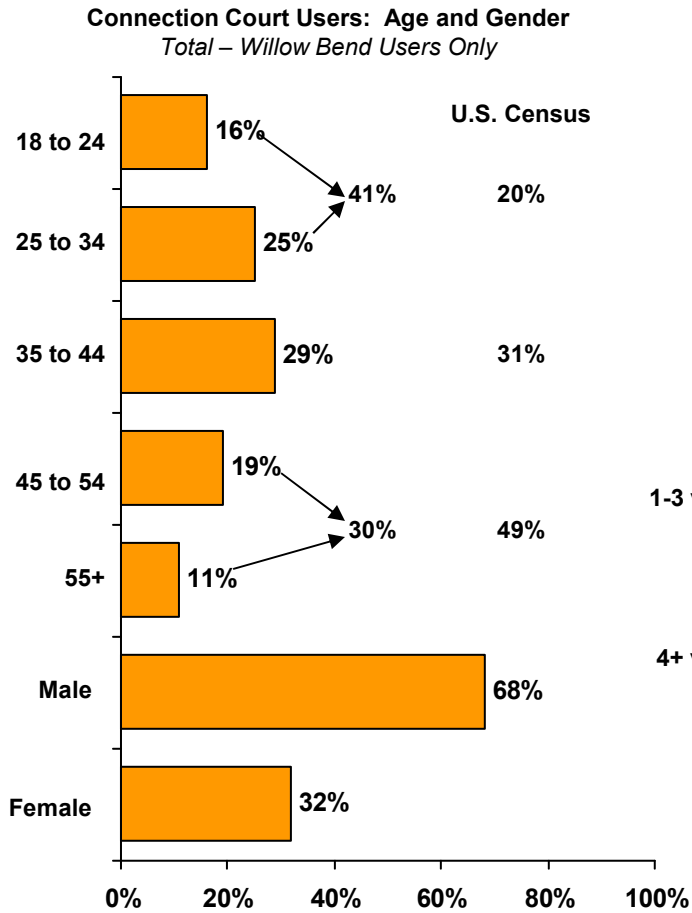
One way to investigate the potential for a stand-alone for-pay Connection Court would be to conduct a survey among frequent users of wireless access in coffee shops, both for-pay T-Mobile users, and free hotspot users, to ask them whether they would prefer Connection Court to these options, whether they would pay to use it for meetings and other capabilities such as printing, faxing and copying, and to what extent they would go out of their way to find and use a Connection Court, when faced with a Starbucks on every other corner.

## Key Findings

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# Connection Court User Profile

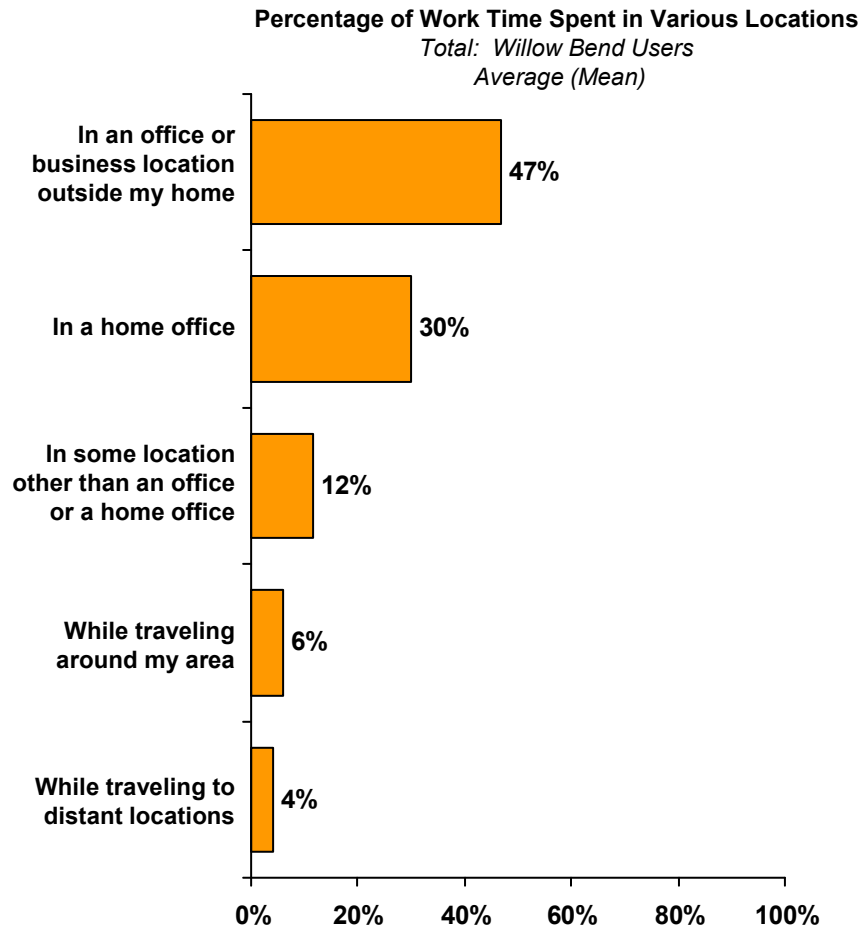
Connection Court Users are predominantly male (68%), and younger than the U.S. population as a whole. They're also frequent visitors to The Shops at Willow Bend; 59% visit this mall once a month at a minimum.



(Q1 & Q3; n=206)



# Connection Court User Profile



In research conducted for the Alliance in the fall of 2003, we determined that on average, the U.S. work force spends 75% of the work week working in a standard office or business location.

In contrast, Connection Court users are much more mobile. They spend 47% of the work week in an office/business location. But half their work time is spent someplace else, like working at home (30%), in some other stationary location like a client office or job site, (12%), or while traveling.

(Q87-Q91; n=206)



# Connection Court User Profile

Tables for these findings are on the following pages.

The great majority of Connection Court Users are employed full-time (85%) rather than homemakers, retirees, or students.

Twice as many Connection Court Users are self-employed (33%) compared to self-employment among the U.S. work force at large (14%).

Nationwide, just 9% of workers work for a very small company (1-10 employees). But because of the higher proportion of self-employed business owners at Connection Court, very small businesses accounted for 32% of users. Did employees from large companies like JC Penney and EDS find their way to Connection Court? Yes, but not in disproportionately high numbers. Three in ten Connection Court users (30%) is employed by a large company (501+ employees). Nationally, 61% work for big enterprises. The actual user representation from large companies is probably equal to the national figures, when the figure for very small companies (boosted by the numbers of self-employed) is adjusted.

Connection Court users definitely fit the profile of a mobile worker. While 48% of all U.S. workers have some say over where they do their work, twice as many Connection Court users (86%) can determine where they work. This difference alone indicates that Connection Court attracted the desired target audience.

Connection Court provided two laptops for use, plus wireless access for those with their own laptops. According to the data, about half (55%) used a Connection Court laptop during their visit, and 42% used their own laptops with WiFi. We can't say for certain that this pattern was found among all people who used Connection Court. Perhaps people who completed the survey were more invested in Connection Court than casual or one-time users. Users who were interested enough to take the survey may also have been more likely to use their own laptop at the site.

The most common occupations are sales, computer programming, executives and business owners, and engineers. We did not ask about household income, but these titles/fields are indicative of a higher than average paycheck. These same types of workers were also found in the focus groups, the ethnographic research, and in the in-person interviews at Connection Court.

# Connection Court User Profile

Connection Court User Profile	Visitors Only (n=206)	Nationwide
<b>Employment (Q83)</b>		
Employed (NET)	84%	60%
Self-employed	33%	
Employed full-time	48%	
Employed part-time	3%	
A home-maker	1%	36%
Retired	1%	
Student	10%	
Not currently employed	3%	4%
<b>Company Size (Q85)</b>		
1-10 employees	32%	9%
11-100 employees	18%	19%
101-500 employees	18%	14%
501+ employees	30%	61%
<b>Work Freedom (Q86)</b>		
I have complete freedom to choose where I do my work	42%	16%
I have some freedom to choose where I do my work	44%	32%
I have no freedom to choose where I do my work	14%	52%
<b>Relation to Dallas (Q92)</b>		
A resident of the Dallas metropolitan area	89%	
Visiting Dallas for business	4%	
Visiting Dallas for personal reasons	6%	
<b>Type of Internet Access (Q9)</b>		
Connection Court laptop	55%	
My laptop, using a wired connection	3%	
My laptop, using a wireless connection	42%	

The table on the left provides user profile details as well as some corresponding findings nationwide across certain demographics. Nationwide percentages are based on the 2000 Census. Detailed employment cuts were not available for all sub-categories.

(Q83/Q86/Q92/Q9)



# Connection Court User Profile

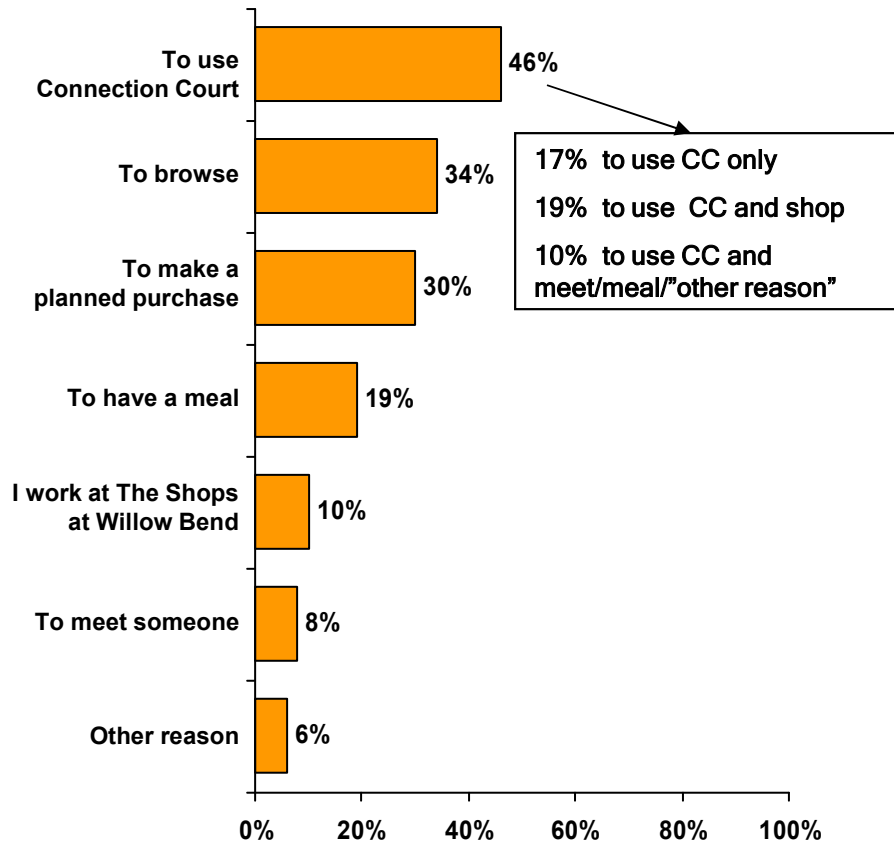
Occupation	Visitors Only (n=172)	Nationwide
Computer analyst/programmer	19%	7%
Sales person/account executive/sales manager	13%	8%
President/executive/director	12%	3%
Other services - private	8%	8%
Owner/partner	8%	5%
Engineer/scientist/analyst/technician	8%	6%
Professional (doctors/other)	5%	4%
Teacher/teacher's aide	5%	4%
Banking/finance	4%	5%
Administrative/executive assisant	3%	16%
Clergy	2%	2%
Artist/graphic designer/architect	2%	NA
Nurse/healthcare support	2%	4%
Assembly worker/construction worker/laborer	1%	1%
Agriculture/farming	1%	1%
Cook	1%	NA
Lawyer/paralegal	1%	2%
Librarian	1%	NA
Machinist/mechanic	1%	1%
Military	1%	NA
Other services - government	1%	5%
Writer/journalist	1%	NA

(Q84)



# Connection Court User Profile

Reasons for Visiting the Shops at Willow Bend  
Grand Total – Willow Bend Users & Workers



People were asked to name up to two reasons for their visit to the mall (for the most recent mall visit).

When they came to The Shops at Willow Bend, respondents used Connection Court, but they also shopped, ate, met people, and did other business. Just a small number (17%) said they came for Connection Court alone. The good news is that Connection Court users appear to be contributing to the mall economy by making purchases and eating in restaurants.

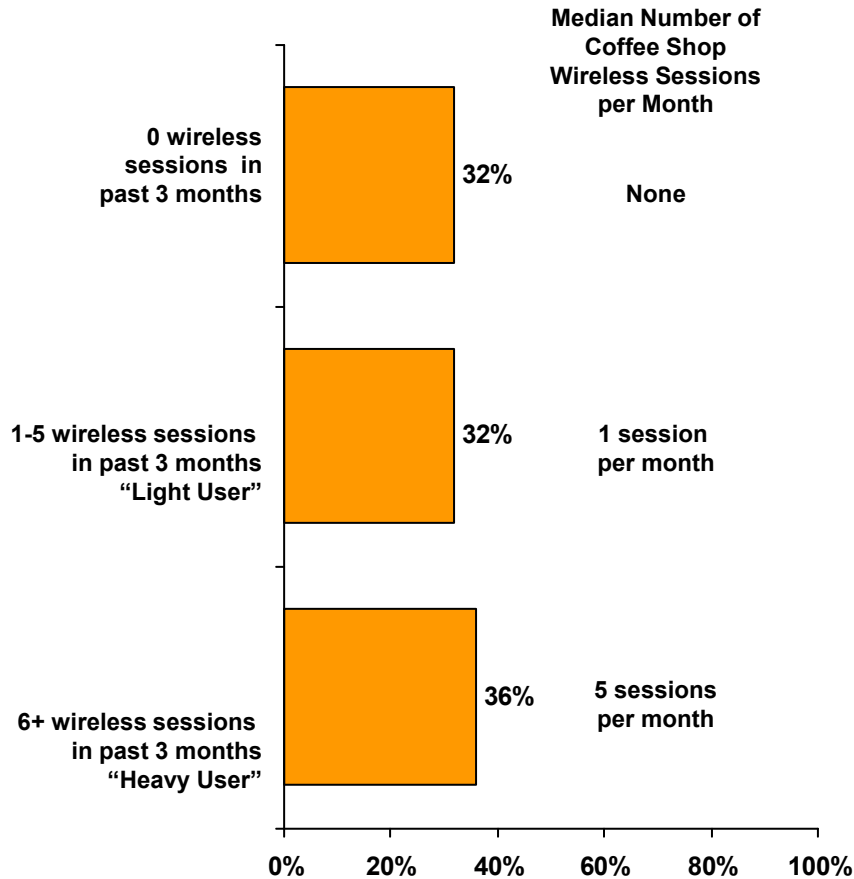
How did users discover Connection Court? Roughly half saw the Connection Court signs and placards while visiting The Shops at Willow Bend. About one in five came across it on their own while shopping. Smaller numbers learned through word of mouth (17%), or in the news (14%).

(Q2; n=230)



# Connection Court User Profile

**Coffee Shop Wireless Access Usage in Past Three Months**  
*Total – Willow Bend Users Only*



Two-thirds of users (68%) at least occasionally use wireless Web access at places like Starbucks, Borders, and independent coffee shops.

There is a good deal of variation in the behavior; some people reported using it once or twice in three months, and others said they used it several times a week. Because of the wide distribution of answers, we've shown the *median* rather than the *mean* figures for coffee shop wireless access usage.

There are two main conclusions here:

- Most people using Connection Court are familiar with wireless Web access; they use it in other locations. This is further evidence that Connection Court has attracted the mobile worker.
- The figures also give a rough idea about the level of traffic places like Starbucks probably receive from their wireless access customers. If the habits of Connection Court users are similar to those of wireless access users at Starbucks, these coffee shops probably see half of their wireless traffic from "light users" (one session a month) and half from "heavy users" (about five sessions a month).

Almost 50% of men fell into the "heavy user" group, compared to just 12% of women users. It seems that wireless access is predominantly a male rather than female activity both at Connection Court and at other 3<sup>rd</sup> places. Participants in the qualitative research was also predominantly male rather than female.

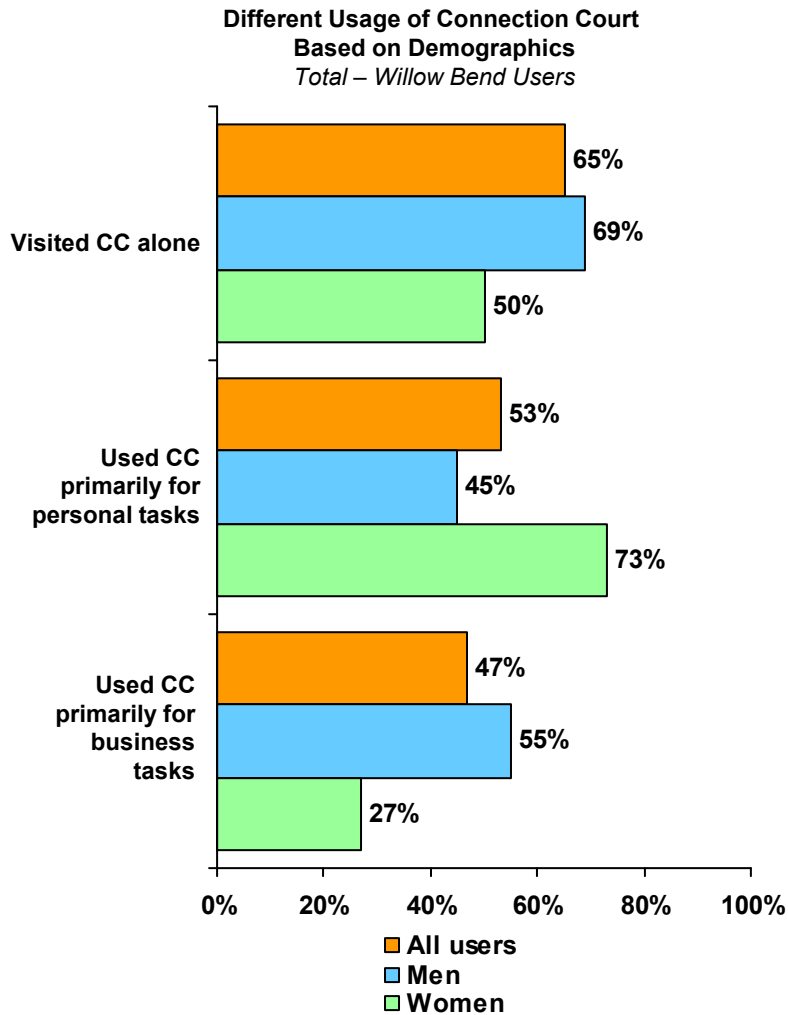
(Q98; n=206)



## Key Findings

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# How People Use Connection Court



Overall, most users visited Connection Court by themselves. Men (the majority of users) were more likely to visit by themselves, while women were equally likely to visit Connection Court with others or by themselves. Overall, 10% of users said they were at Connection Court with colleagues or clients, and 15% visited Connection Court with a spouse in tow.

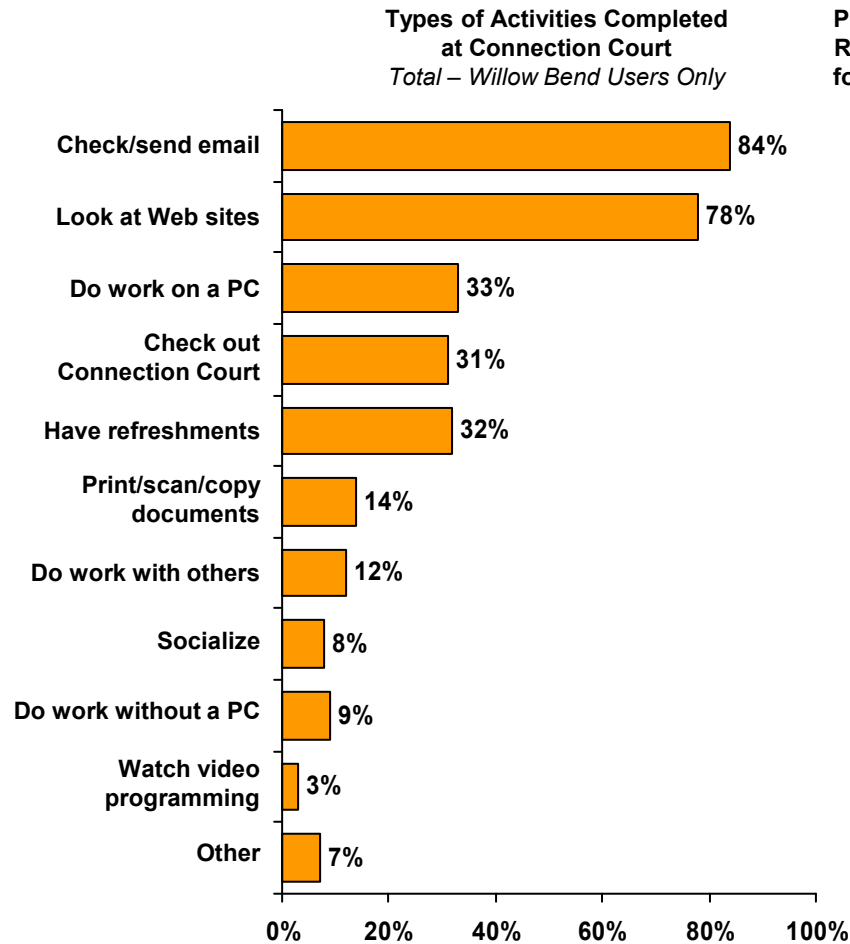
Is Connection Court for personal use or business use? Overall, activity was split evenly between “primarily for personal” and “primarily for business” tasks. Most women (73%) characterized their use as personal rather than business.

Connection Court use also varied by the age of the user. Younger people (aged 18-24) used it for personal tasks (82%), while people older than 24 used it for business and personal tasks in equal numbers.

(Q4 and Q6; n=206)



# How People Use Connection Court



**Primary Reason for Visit**

48%  
15%  
12%  
10%  
0%  
2%  
5%  
0%  
0%  
0%  
1%

Users were asked what activities they engaged in at Connection Court, and what they considered the one *primary reason* for the visit.

Nearly every user looked at Web sites and checked their email; and email is the primary reason given for using Connection Court. One-third said they did work on a PC (something other than Web and email).

Getting a latte is also common; one-third said they had refreshments during their visit.

Among the 47% who were at Connection Court for *business tasks*:

- 48% did work on a PC (not Web or email)
- 21% were at Connection Court to do work with others
- 15% printed/scanned/copied documents

Among the 43% who brought their laptop to Connection Court:

- 61% did work on a PC (not Web or email)
- 22% were at Connection Court to do work with others

Users who printed documents (13% of respondents) printed Web pages (48%), documents (59%), email (44%), and spreadsheets (22%).

The four who used the scanner scanned documents and digital photos.

The three who used the copy function copied documents and digital photos.

(Q7/Q8; n=206)

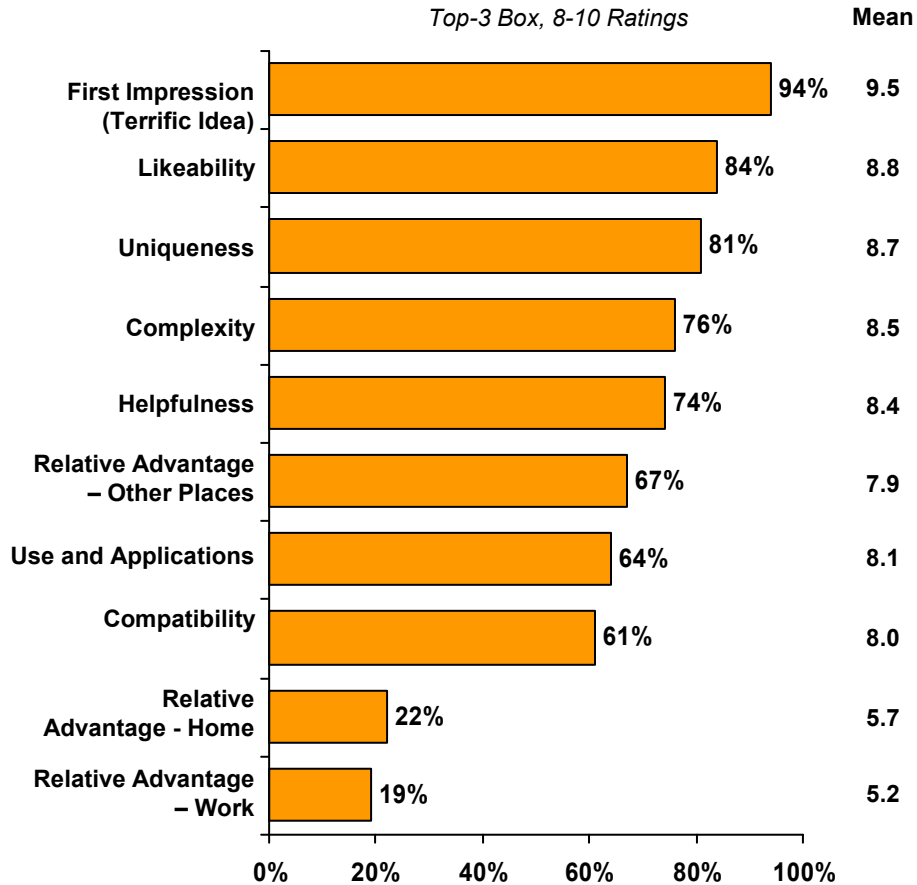


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# User Evaluations of Connection Court

**Overall Impressions of Connection Court**  
*Grand Total – Willow Bend Users & Workers*  
*Top-3 Box, 8-10 Ratings*



(Q11, Q14-Q22; n=230)

We regularly use this “Diffusion of Innovation” question series when presenting a new concept to respondents. Our rule of thumb is that mean scores of 7 or better indicate potential for a concept’s success.

In this case, all respondents were in fact Connection Court users. Absent from this analysis are the mall shoppers who strolled past Connection Court and dismissed it. Therefore these very complimentary scores can’t be generalized to all mall shoppers. But these rave reviews can be generalized to the mobile worker target audience, because Connection Court users so closely fit the mobile worker profile.

For most Alliance research, we examine reactions from the “Primary Market,” which comprises about 40% of U.S. households. Previous concepts and pilots tested among the Primary Market received average appeal scores in the range of 7.0 (Mealtime) to 7.6 and 7.7 (Laundry Time and Home Hub). The audience for Connection Court is a subset of the Primary Market, and it doesn’t make sense to compare scores across concepts when the audiences are not the same. We can say, however, that Connection Court did an excellent job meeting the needs and desires of this particular audience.

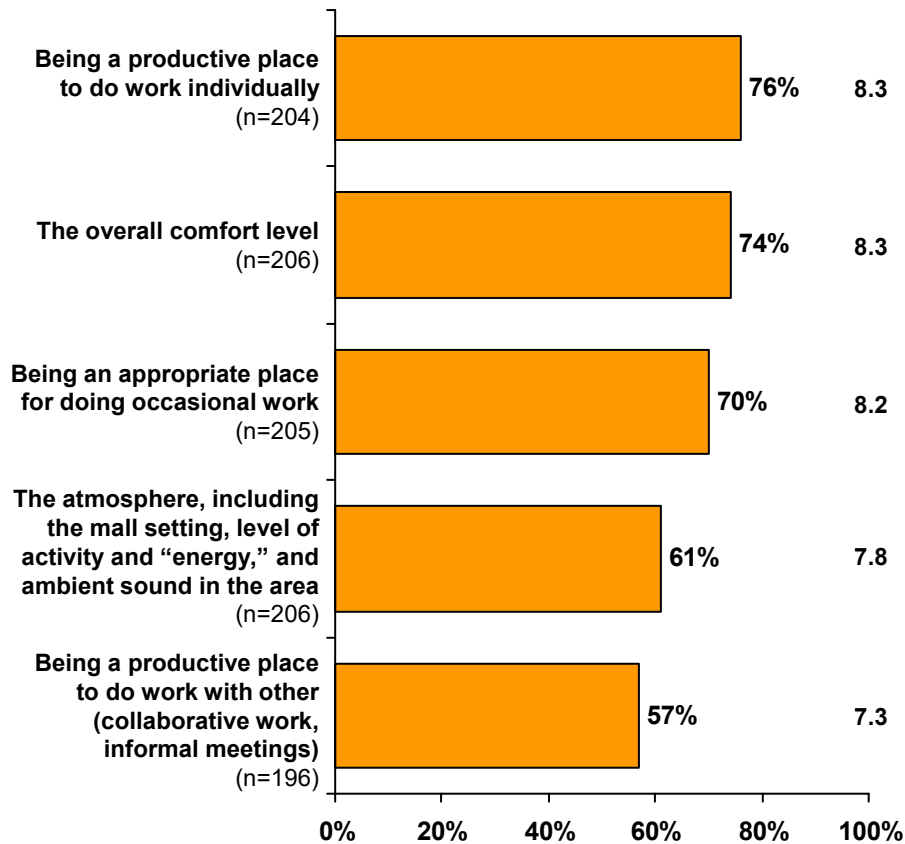
In order of graph presentation:

- Q11. Given your interests and lifestyle, what’s your first impression of this idea?
- Q16. To what extent do you dislike or like CC?
- Q17. How would you rate CC in terms of its uniqueness?
- Q19. To what degree is CC difficult or easy to use?
- Q18. How helpful would CC be in solving a problem you might have?
- Q22. Other places where you might do work, such as a library or restaurant?
- Q15. How many occasions can you think of when you would use CC ?
- Q14. What types of people do you think would like Connection Court?
- Q20. How does CC compare to your home as a place for doing work?
- Q21. How does CC compare to your primary place of work as a place for doing work?



# User Evaluations of Connection Court

**Rating Connection Court**  
*Total – Willow Bend Users Only*  
*% Suits Me Very Well, 8-10 Ratings*



Users gave very high marks to Connection Court for being comfortable, conducive to individual and collaborative work, and for offering the right vibe or atmosphere for being productive.

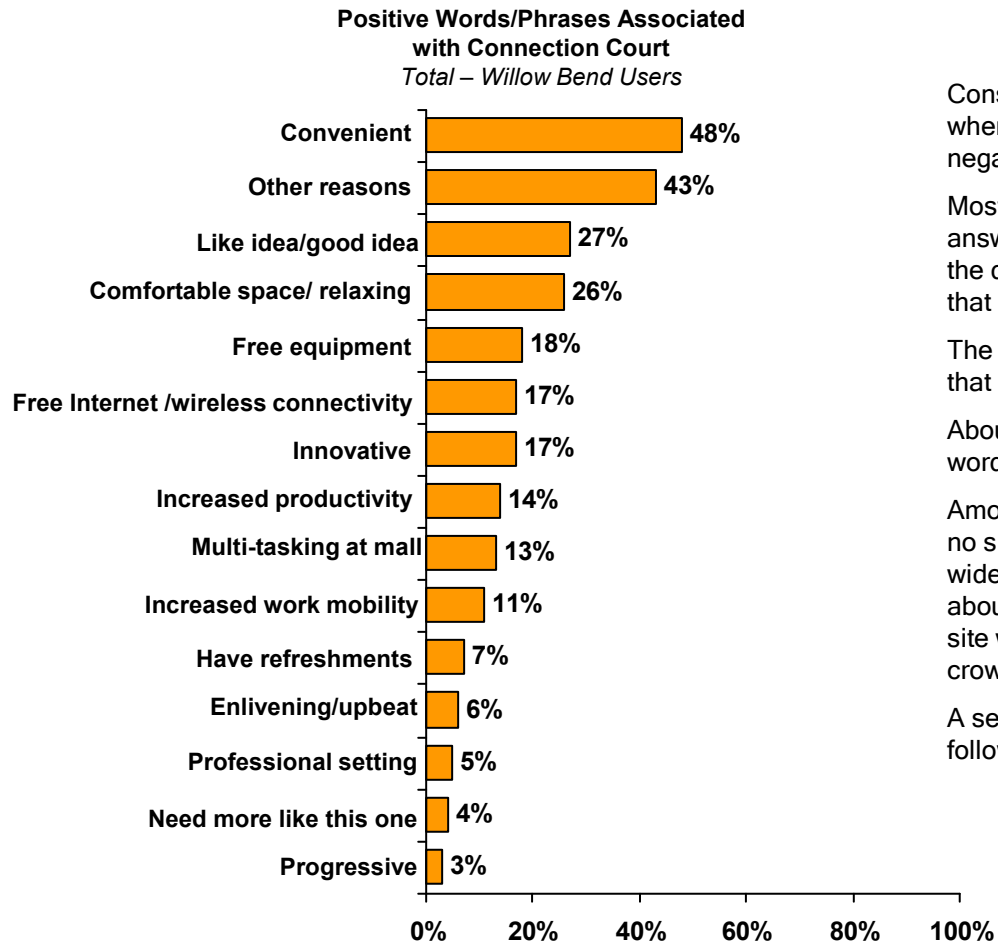
Very often, the proportion of people who say they would recommend a product/service is a strong indication of the magnitude of a concept's success. For Connection Court, 80% of users said they would recommend it to someone they know. This is very strong evidence that Connection Court fulfilled the ideal among the mobile worker target audience.

(Q25-Q29)





# User Evaluations of Connection Court



Consumers were asked to type in words and phrases that came to mind when thinking about Connection Court, and classify them as positive or negative.

Most users (87%) had something positive to say. The most common answers related to “convenience,” “great idea,” and compliments about the design of the space. Note also that about one in five were happy that Connection Court didn’t cost anything to use.

The “other reasons” (43%) are a hodge-podge of words and phrases that don’t lend themselves to classification.

About two-thirds gave positive comments only and had no negative words/phrases.

Among the one-third who offered some negative impression, there was no single complaint; most negative words and phrases ranged far and wide and didn’t coalesce into any patterns. There were a few concerns about privacy (six of 206 respondents), and that registering to use the site was a hassle (five of 205). A couple thought Connection Court was crowded (four of 206).

A selection of positive words/phrases volunteered are presented on the following page.

(Q12; n=206)



# User Evaluations of Connection Court

A representative selection of verbatim comments about Connection Court are shown below.

When you think about this idea, which words or images come to mind first?

*"How 2004 and beyond."*

*It's a mobile office."*

*It's a great idea for the business person on the go."*

*"I'm out of the house, so there are fewer distractions to keep me from my work!"*

*"It makes an otherwise dull mall very exciting."*

*"This is great for people who work from home, but need a place to meet colleagues."*

*"Now I have the freedom to shop and be in touch with clients."*

*"I can monitor my company's e-mail and business situation."*

*"It's a private cubicle where I can get work done."*

*"I just moved to Dallas from Austin. Austin has a ton of places like this. Dallas needs more. The Court is on the right track."*

*"This let me get away from the office and yet stay connected."*

*"A great escape from the confines of home or the office."*

*"For my situation, i.e., a small, local, technology consulting business, I'm looking to stay virtual as long as possible and not rent space, this service is a 100% match."*

*"I think this is a first for a mall. This is the beginning of something good. I hope it stays a permanent fixture."*

*"I would definitely tell others about this place. Would really like to see it in malls around the country/world."*

(Q12)

# User Evaluations of Connection Court

Connection Court's Problem Resolution Capabilities	Total Willow Bend Visitors Only n=145
Easy access to internet	63%
Other	12%
Can hold meetings	10%
Can multi-task during work	9%
Be creative/fun venue to work in	7%
High speed connectivity	6%

Seven in ten users said Connection Court was helpful in solving a problem they had.

Roughly two-thirds of those problems were solved by having easy access to the Internet.

A few volunteered that Connection Court helped them by being a good meeting place, but the proportion who felt this was quite small, at 5% of all respondents (that is, 10% of respondents answering the question).

A representative selection of verbatim “problem solving” comments are shown below:

What is the problem and how would using Connection Court help solve it?

*“Business meetings at a central location, where wireless access is critical.”*

*“Access to email while traveling within the metroplex.”*

*“We were at a soccer tournament and didn't know if we needed to go back for another game. We knew the Web site would be updated soon. I had my laptop, but couldn't pick up a wireless signal anywhere. Went to the mall to hang out and saw the signs - were able to log onto the website and check scores. Pretty cool!”*

*“If I was needing to look up something while I was on the road and not at home or near the office.”*

*Not having an office in the North Dallas area, a place to meet clients and discuss the issues we need to discuss in a safe to meet environment*

*Outside meeting place with WiFi (broadband access) which gives me another communication possibility while out of the office.*

*When I need somewhere to spend productive time between meetings when in the vicinity, Connection Court is a very comfortable and productive place to spend time. Much better than a coffee shop or random WiFi hotspot. Free is good too!*

*Quick e-mail communication in the middle of the work day.*

*I have a small business that entails frequent ordering and i do that via the internet....i don't have to wait till i return home when i think of something i need to order and do it right away.*

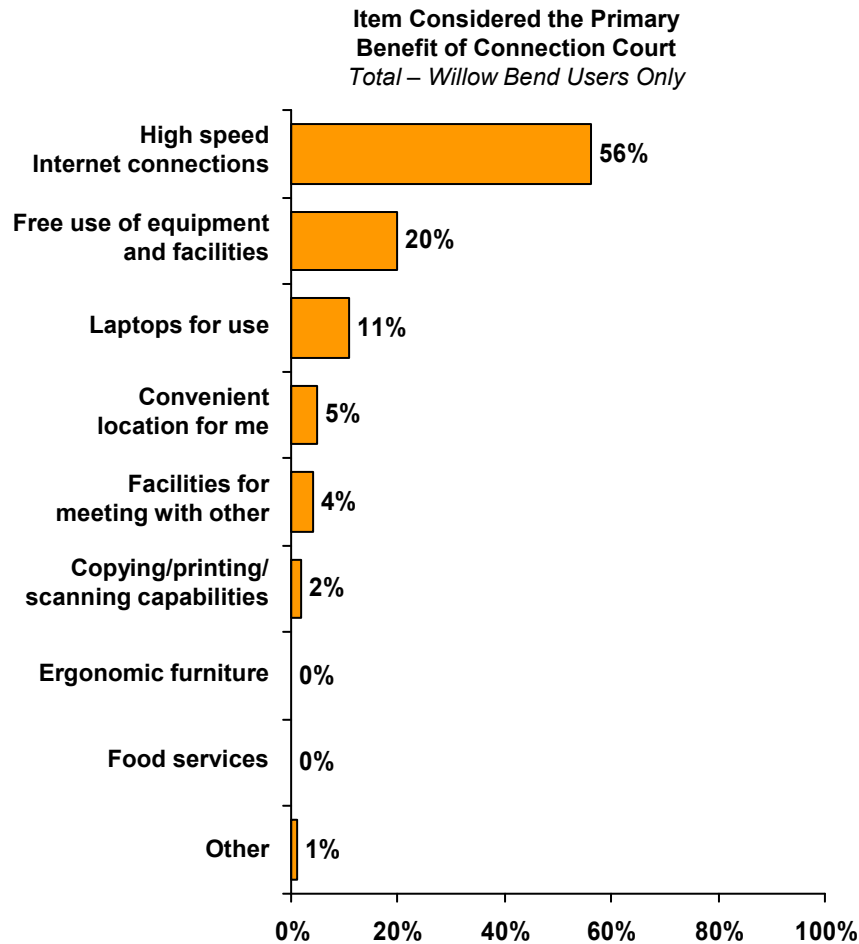
*Trying to find movie times or getting dinner reservations. Needing to check email to see what time a meeting is...*

*Searching for a particular item such as a car, compare prices, reviews, etc. before entering a dealership. Reaching someone at work where they are unable to receive a call but able to open e mail. find out what stores are having sales prior to shopping. Checking account balances before making purchases.*

(Q23; n=145)



# User Evaluations of Connection Court



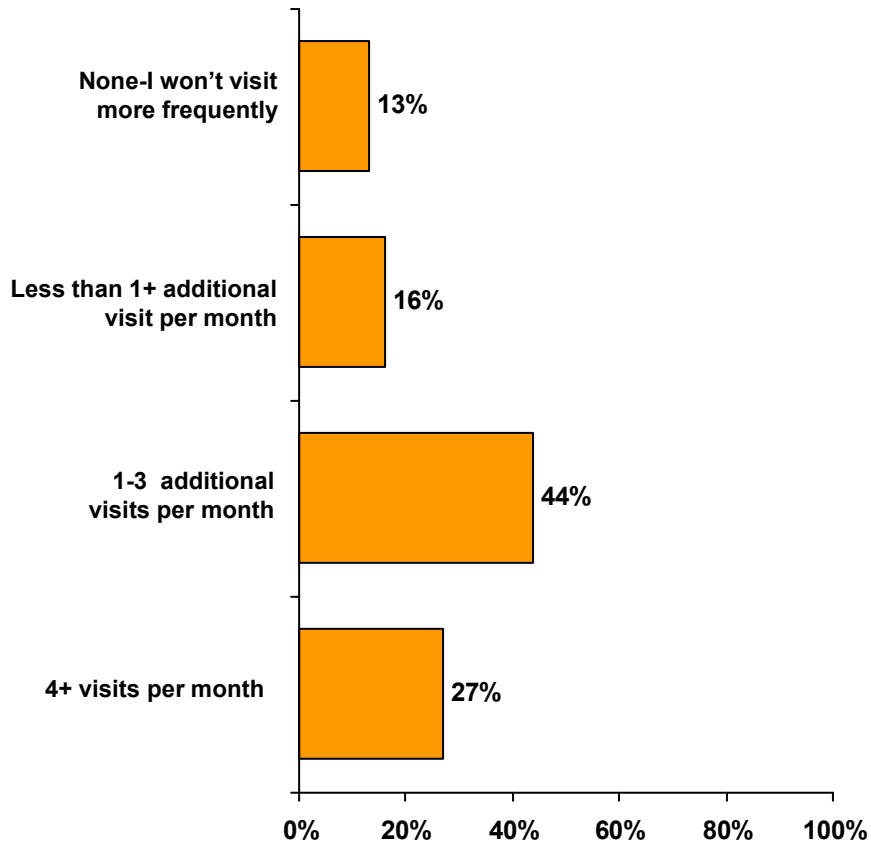
Users were asked to pick one aspect as the single primary benefit to Connection Court. Here is further evidence of a pattern of priorities. Web and email access (Internet access) is by far the most valued benefit, compared to other aspects such as the ability to have meetings or to copy/print/scan. That is not to say that people didn't print/copy/scan (14% did), rather that the value of high-speed Internet far exceeded that of the site's other characteristics.

(Q24; n=206)



# User Evaluations of Connection Court

**How Connection Court Affects the Frequency of Visits to Willow Bend**  
*Total – Willow Bend Users Only*



71% of users predicted that Connection Court would prompt them to come to The Shops at Willow Bend at least one additional visit per month. And an astounding 27% expected to come to Willow Bend four times per month more often than they visited it before Connection Court.

The dramatic effect on mall visits is particularly impressive when the profile of the typical Connection Court user is considered: male, aged 18-34, and working in the computer or engineering fields, or in sales or executive positions. Shopping malls with an interest in this fairly elusive demographic may want to consider the enticement Connection Court offers this group, which brings them into the middle of the shopping mall in proximity to shops and restaurants.

(Q74; n=206)

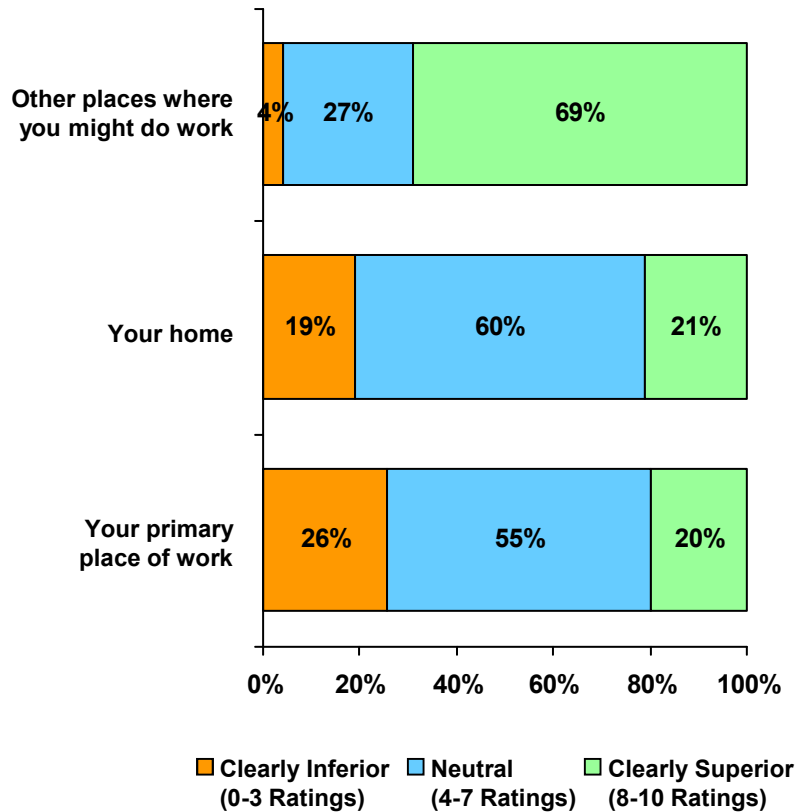


## Key Findings

- Background & Methodology
- Executive Summary
- Key Findings
  - Connection Court User Profile
  - How People Use Connection Court
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  - **Connection Court and Alternative Work Settings**
  - Pricing Connection Court
  - Connection Court Users Have Their Say
- Appendix: Traffic Patterns

# Connection Court and Alternative Work Settings

Comparing Connection Court to Alternative Work Settings  
Total – Willow Bend Users Only



Users compared Connection Court as a place for doing work to other locations where they do work, including at home, at the office, and at other places where they might work.

As the chart shows, Connection Court is not considered a better alternative than working at home, or working at the office. People were reluctant to say that Connection Court was superior as a place for doing work compared to these locations.

The general take-away is that Connection Court can position itself against 3<sup>rd</sup> places, but should not position itself against the office or against working at home.

In the focus groups and ethnographic observations, participants said working at home was efficient because they could be engaged with both the family schedule and with the work - and do it wearing slippers if they wanted to. The downside of working at home (interruptions and distractions of home and family) is also the upside of working at home.

(Q20-Q22; n=206)

# Connection Court and Alternative Work Settings

Besides at home and at the office, where do mobile workers go to get their work done? The charts on the next page show that mobile workers work in many places - restaurants, libraries, airports, and hotels. But the place that Connection Court seems to compete with most directly is the coffee shop.

## Connection Court vs Coffee Shop

Two-thirds of users said they had done work in a coffee shop at least once in the past three months. And if Connection Court hadn't existed, a good many (25%) would have gone to a coffee shop to complete their tasks (the percentage was higher - 37% -- among people at Connection Court primarily for business tasks).

In the first survey, we asked people where they would prefer to work if they were an equal distance from Connection Court and from a coffee shop they liked. 77% said they strongly or somewhat preferred Connection Court, because they could be more productive (15% of preferrers), and they liked the atmosphere better (15%). But most often, the single reason they liked Connection Court better was because it had free Internet access (35%).

But what if Connection Court wasn't free? In the second survey we asked people which they would prefer if Connection Court and the coffee shop each cost roughly the same amount to use. In this version, Connection Court was again preferred over the coffee shop, by 62% of respondents. They liked Connection Court better because they could be more productive, combine work and personal activities, they preferred the atmosphere and they found it more comfortable. No single aspect emerged to differentiate Connection Court from the coffee shop; rather all these answers were given in roughly equal numbers.



# Connection Court and Alternative Work Settings

## Connection Court vs Hotel

About half of mobile workers had done work in a hotel in the past three months. If the cost were about the same, 52% of hotel workers would prefer Connection Court rather than working at the hotel, most often because they could combine work and personal activities (53% of preferrers chose this answer). Especially in the mall setting, Connection Court would allow business travelers an opportunity to get a flavor of the city - or at least the city's shopping malls - while doing their work.

## Connection Court vs Airport

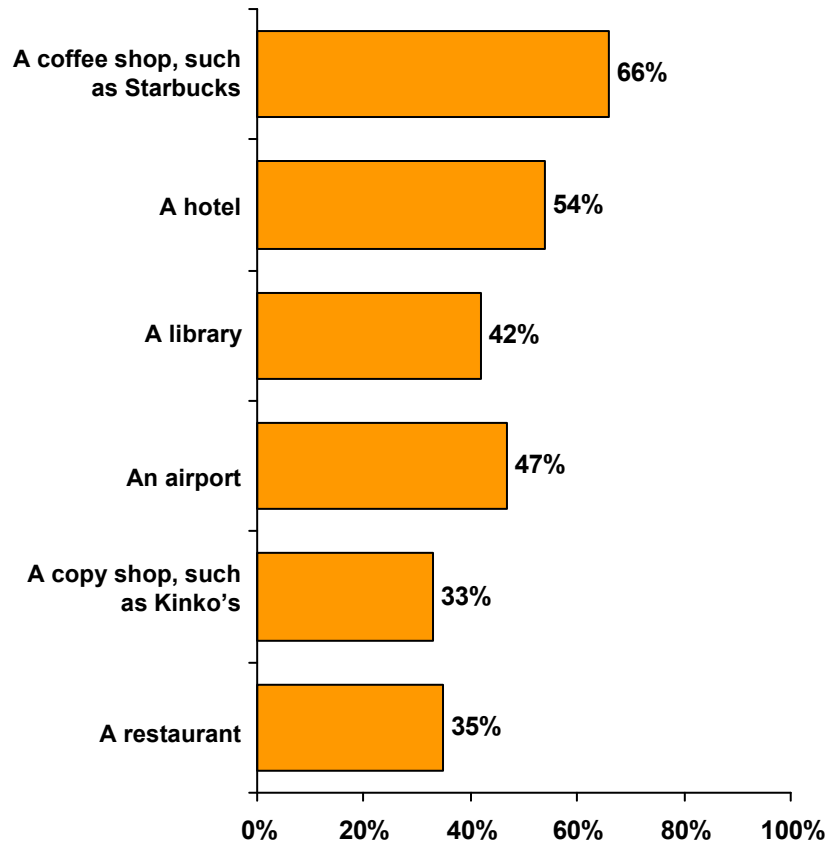
About half said they had done work in an airport in the last three months, including email (76% of flyers), and Web surfing (57%). Connection Court was preferred over the airport when it was free (71%) and when it cost the same as an airport business center (52%).

## Connection Court vs Library

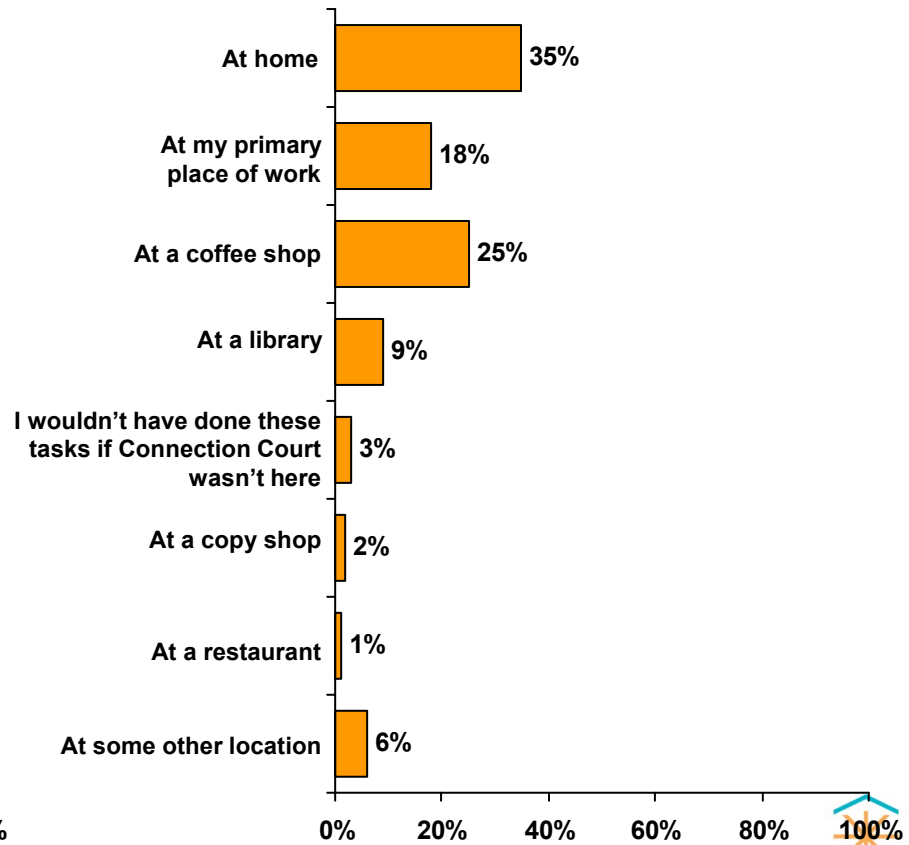
About four in ten respondents had used the library for work in the past three months. If Connection Court charged a nominal fee, most (44%) preferred the library although many (32%) preferred Connection Court. Library preferrers said the library was free (44%), and a more productive setting (28%).

# Connection Court and Alternative Work Settings

**Percentage of Users Who Have Done Work in 3<sup>rd</sup> Places in Past Three Months**  
*Total - Willow Bend Users Only*



**In the Absence of Connection Court, These Tasks Would Have Been Conducted At:**  
*Total - Willow Bend Users Only*



(Q32-Q37; n=206; Q31A; n=110)

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# Pricing Connection Court

It's clear that the mobile worker target audience likes Connection Court very much, both as a concept and in its execution at The Shops at Willow Bend. But will mobile workers pay to use it?

All indications are that very few mobile workers would pay to use Connection Court. As the charts on the following page show, about two-thirds expected that it would be *offered at no charge* after the pilot period. Just 15% expected to pay something to use it.

The rationale for a free Connection Court generally falls into two categories:

"I can get free wireless all over town. Why should I pay for it here when I can just go someplace else?"

"It's an amenity that brings people like me to the mall, where I spend money that I would otherwise spend in some other location. I'm paying with my mall purchases."

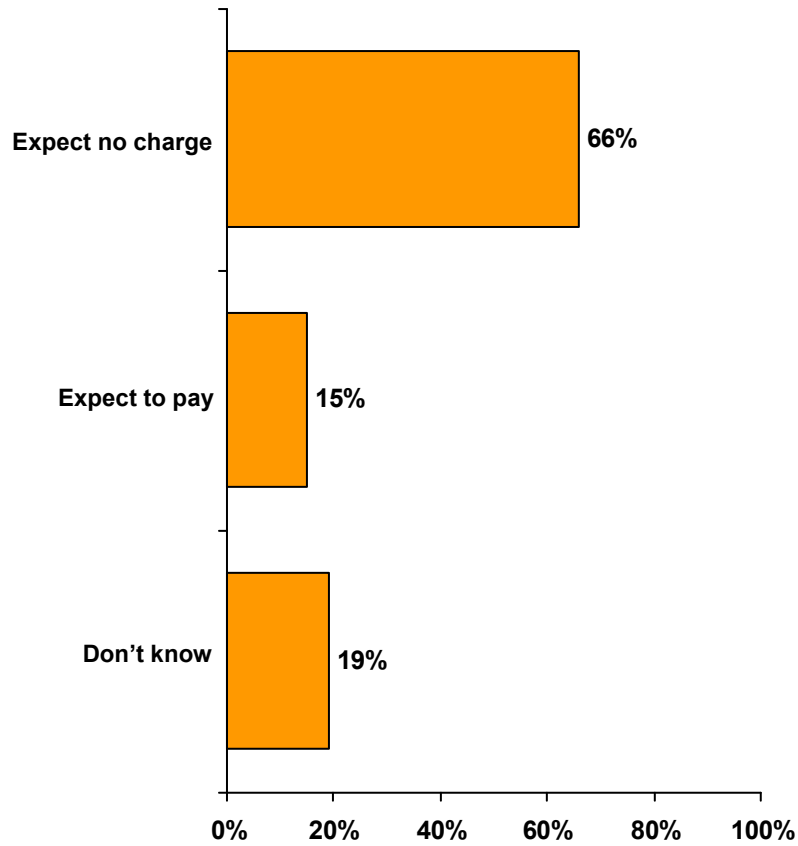
To gauge demand among mobile workers, we tested potential prices of \$4, \$6, or \$8 per hour, and \$25 per month. We then adjusted the figures to account for the fact that more consumers report an intention to purchase than will actually buy. The formula is derived from the Bases Group, which found in consumer goods pre- and post tests that actual purchase behavior is best expressed as the sum of 70% of "definitely purchase" responses, 30% of "probably purchase", and 10% of "might/might not purchase" responses.

With adjusted figures, about 5% of mobile workers would pay to use Connection Court at any of the prices tested. Demand was inelastic at these prices. That is to say, a group that decided to build a for-pay version of Connection Court could charge either \$4, \$6, \$8, or \$25 per month, and the demand would be roughly the same, at about 5% of the target audience. It's important to note that the sample sizes are quite small for individual prices (30-35 respondents for each). The data are not especially robust at these sample sizes, and should be considered directional rather than definitive. The broad learning however, is that there is very limited interest in Connection Court as a for-pay 3rd place. If 48% of U.S. workers have some freedom to choose where they work, the audience for Connection Court at any of these prices would be about 2.4% of U.S. workers.

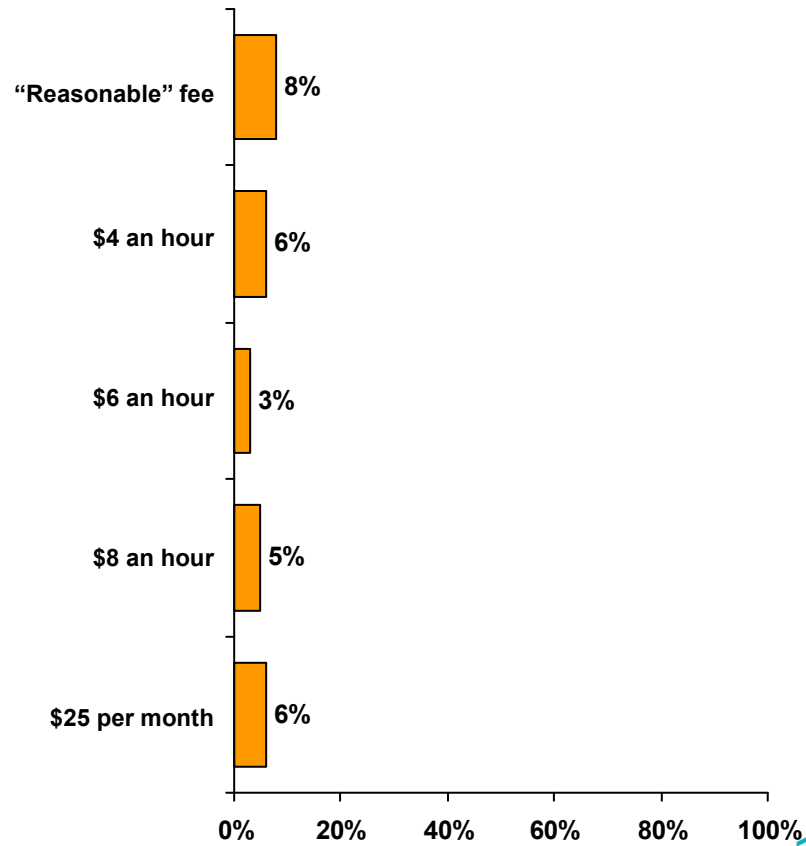
If they had to pay for Connection Court, the preference would be to pay with by making a required minimum refreshment purchase (chosen by two-thirds), rather than per hour of use (17%), by equipment use (12%), or by monthly membership (4%).

# Pricing Connection Court

**After Pilot, Will Connection Court Be Free or For-Pay?**  
*Total – Willow Bend Users Only*



**Connection Court Users: Demand For Connection Court at Various Prices**  
*Total – Willow Bend Users Only*



(Q76; n=202, Q76A - D; n=30-35)



## Pricing Connection Court

Respondents voiced a number of reasons against paying a fee to use Connection Court. Nearly half of the respondents who are unwilling to pay a fee say they can get free access from other sources (45%). And most are paying for Internet connectivity at home or have access at work.

Below is a selection of verbatims highlighting the reasons given for not paying for Connection Court.

*"I pay \$39 a month for high speed access at home. That's 30 days X 24 hours. That's like 6 cents an hour. Do I want to pay another \$40 a month on the off-chance that I might use my laptop at the mall? No."*

*"I have free access at home and at the office.... and some coffee shops. I mainly use connection court as convenient way get out of office, browse the mall, and then relax with cup of coffee and maybe snack during lunch."*

*"How much does wireless Internet cost? \$100 a month maximum. Willow Bend will get 10 times that amount in revenue just by allowing people to have free wireless Internet. People will come here to get online conveniently, and will shop later when they are done. You start charging people, and the very ones that would not normally go to the mall or Willow Bend mall will - do just that - never go."*

*"I can get free service all over town. Your competitor is not T-Mobile. Your competitor is the army of geeks out there setting up free hotspots for vendors that want to increase their traffic."*

*"I have a monthly roaming membership with Wayport and would prefer the option of using that, otherwise I'd find it reasonable to buy a coffee for \$2.50 to use the connection court for a couple of hours."*

*"I am using the Court because it is easy, free and brings me to where I can do my shopping - what used to be several trips is now consolidated into one. By having the access free, you are bringing business to the mall."*

(Q78; n=120)

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# Connection Court Users Have Their Say

Users were asked to make any comments about Connection Court at the end of the survey. Their answers, provided in no particular order, show the range of impressions about the space. Over and over again users said “I love it” and “Please keep it free.”

We’re interested in your thoughts about the space.

*Work on the food and drink. Work on the initial sign up. Work on the how to fix it if you can't connect book. [Hire somebody to hang around a while and help people get connected and MAKE HIM KEEP A DETAILED LOG AND WRITE DOWN WHAT HE HAD TO DO TO FIX EACH PROBLEM and then get a non-geek to write it in simple language and then hire a non-geek to hang around and help people using just that book and REVISE AS NEEDED.]*

*Willow Bend is a ghost town during the week. It's target demographic is sparse in that part of Plano. The largest mall in the state is just 2 miles north. The Connection Court doesn't just attract people to the court or coffee shop it attracts people to the mall. I have spent an average of \$50 in surrounding stores each time I have used the Connection Court.*

*Printing wasn't straightforward.*

*Very good idea. CC should work out well in bringing daytime visitors to the mall, at a fairly low cost for the mall. The level of amenities at CC could even be reduced and still have it be a very attractive feature of many malls.*

*Overall everything was very nice. There was one serious drawback for part of my visit. The sun shining through the skylight was either in my face or on my laptop screen making it very difficult to see. I would have left for just that reason, but the weather turned cloudy. I'm guessing that I might have difficulty getting a desk sometimes since there aren't that many. They were all in use during my visit. This is a great idea overall and I hope it can be provided without charge. I don't need the laptops there at all. I've often worked at the mall before, this just makes it far more comfortable and productive.*

*Let the shop owners subsidize the idea.*

*Needs to be more visible, access is adequate. If a fee structure is going to be implemented an attendant would need to be on hand for support.*

*Under a skylight - When there are no clouds, it is very bright - hard to read computer screen. Bathrooms are too far away - have to shut down computer, pack up, come back, reconnect. Like very much the fact that the computers provided cannot be used as email machines unless you already have email through another provider - keeps out the kids. Great chairs - more desks are needed that don't have computers - hard to sit on the couch and type - great concept - can't believe it's being offered. Would choose to work there some days when I'm tired of being cooped up in the house - great for people with portable computers.*

*Computer placement not comfortable/ergonomic (keyboards too high/too far forward)*

*I don't know of many people that would pay to have internet access in a mall.*

*I think that the Connection Court is a very unique place that no other mall can say they have. Since Willow Bend needs something to attract customers, this maybe the something different that they might enjoy.*

(Q99)



# Connection Court Users Have Their Say

## We're interested in your thoughts about the space. (con't)

*I really enjoyed the chairs... I looked them up online while I was sitting in the CC. Great quality and very comfortable. Nice, private atmosphere too.*

*I am glad that this concept is displayed at The Shops At Willow Bend. I think this is a first for a mall. I believe this is the beginning of something good. I hope it stays as a permanent fixture.*

*The space is very aesthetically pleasing, the furniture is very comfortable and the provided equipment (whiteboard, benches, tables and printer/copier/fax) are more than I expected. The next week, I told many of my co-workers about the facility and they were surprised and impressed by the quality as well. I predicted that it wouldn't be around too long, as its just completely perfect. After I visited Connection Court, I wished I worked away from the office more or had a job that was conducive to me choosing my work environment. I will probably try to make an excuse to visit Willow Bend mall once per month in order to take advantage of Connection Court.*

*I think the idea is great, but when it is no longer free, I will no longer come here.*

*it is a great feature that is added to this mall. I would choose to go to this mall over others for this reason alone.*

*Keep this a free to the public service and it will work, otherwise, I don't think your venture will succeed.*

*I think it's a great idea.*

*Extend the power outlets and Connection Court to the food court or rest of the mall.*

*I love the idea and the feeling Connection Court. I like the location and the ability to get everything done with or with out a computer. It would be great if there were more around the DFW metroplex. I've told everyone about Connection Court!*

*Add more computers on all stations.*

*I enjoy using the Connection Court, it is very user friendly, it is a comfortable environment, and I enjoy and appreciate everything I can get accomplished while I am here.*

*An assistant to help with the equipment and office materials would be very beneficial.*

*That's a good idea to have a place where you can keep working in what you want or have to.*

*I think you need more computers. I think there should be a limit to how long you can use services, to prevent a wait for other customers.*

*It would be nice if you could log in a couple of devices at the same time. It would be nice if the automatic logout was based on all activity, and not just web traffic. I use encrypted traffic to log in to other servers, as well as upload/download source code. This is done using SSH protocols, rather than unsecure HTTP protocols. There is also some FTP traffic as well.*

*Great idea for sales people like me who work out and about in the metroplex. More privacy would be good. More space will be needed soon.*

(Q99)

# Connection Court Users Have Their Say

## We're interested in your thoughts about the space. (con't)

*CC coffee is not as good as Starbucks, in fact, it is very poor quality. I tried it once and it's not even acceptable.*

*Great idea...try to keep it free or require a minimum purchase at the coffee shop to obtain free service.*

*Great concept to build the mall usage...the mall should underwrite this concept to keep people coming here since overall this place has struggled.*

*Nice idea for people that are already here, either for work or shopping with others, but cannot see why someone would pay to come to a mall to use the internet when it can be done for free at some locations, or at home. Only reason I would use the service, if I was already here. If I used the laptops or connection here for business use, I would be worried about tracking and privacy issues.*

*The white board on wheels is a good idea to be able to create temporary meeting cove with other seating furniture. The 3-sided cubes (desk) are workable, but to allow more collaboration with my partner it would be nice to have a feature to lower the frosted glass between one of the other desk space for open communications. This is beneficial when our work is partially independent, but sometimes needs a discussion every now and then. When the major anchor retail store opens at this Connection Court area in Willow Bend, the cozy feel and business productivity of the Connection Court may change to a negative side. Yet to be determined...*

*I love being able to come down on my breaks and use a computer- I think it was a great concept.*

*The sunlight from the windows causes glare for some workstations during certain times of the day. This is a minor annoyance for some users.*

*The wireless connection was fine, but frequently disconnected. The frequency from the Apple store was stronger, and so I found myself on their system more often. For longer term stays (several hours), the coffee shop did not offer enough of a selection. I had to pack up, go to eat at another location and then come back.*

*I think it is a great customer relations activity for Shops at Willow Bend. My one reservation is the level of help offered people who might have trouble using the area. I would hate to see Connection Court begin to charge people, especially since there are free hot spots around.*

*it's something unique that no other mall has. you need people to come to the mall so I think it's a great idea to keep it going.*

*Not sure if parking to get to the court is a problem vs a local shop. But if the participants want to shop it is a great idea.*

*Carpet would be nice. Once Saks opens, the space will feel not so out of the way.*

*I'm on a Mac and have had some connectivity problems with wireless access in that the carrier is only PC-compatible. I liked that Connection Court worked great on my Mac!*

*Great idea. It's smart to make it free, though I would be concerned about teenagers abusing the area. Perhaps you could impose an age limit. I've always thought that malls could do more to make them more like a town center, where people can congregate for reasons other than shopping.*

*I am pleased with the concept...I love the location...I would like to see someone at the site at certain hours to be of assistance with any questions customers to the court might have...*

*I love the idea and was surprised at how busy it was on the Thursday afternoon I was there. Many of us had to wait to use a PC. I waited 10-15 minutes before I could get on a computer. Others waited longer. It was worth the wait--I was able to get some work done while away from my home office.*

(Q99)

# Connection Court Users Have Their Say

## We're interested in your thoughts about the space. (con't)

*This is very convenient for reading my e-mails and the seating is very comfortable.*

*CC's coffee use to be good but it seems like they are just giving minimum service and quality now. Connection Court is a great Idea. I hope, on one hand, that it is successful so it continues and on the other hand that it doesn't catch on, so it does not get crowded.*

*I spoke with a person taking a survey the other day and gave him my detailed thoughts on the Connection Court. This is an excellent concept for increasing mall traffic and making purchases. For example, I purchased 2 pieces of equipment based on my use at the Connection Court. I suggest you expand wireless coverage throughout the mall, while retaining the equipment services in a central location. With regard to fee based services, I would retain free internet access and charge for equipment rental. I recommend that all PCs be equipped identically, from a software perspective. Also, can you set it up to scan from your personal PC rather than the 4 laptops. Lastly, make a few more Ethernet ports available in the sitting area. Often, you'll see people with their own laptops taking up Connection Court desk so they can use the Ethernet connection - and, the Connection Court PC is unavailable as a result.*

*Good idea. I like the availability of laptops the most as opposed to having to use your own laptop or PDA. The fact that it is free is also a large plus.*

*Great idea!*

*Great idea. Leave it free, otherwise I won't choose to come here. Put in more power outlets.*

*Allow for multiple devices to be hooked up under the same account. I have three devices (two laptops + PDA, although only generally need two online at a given time) that I sometimes need to transfer data back and forth between.*

*This service has great potential for generating business for all the stores in the mall. As well as, providing a convenient place for people to meet and do business.*

*Let me sit outside. Oh yeah, don't start charging; I'll buy stuff in the mall more often.*

*I appreciate the ability to browse the internet, check e mail and if need be print documents. the Connection Court has defiantly helped my family with a lot of information towards an automotive purchase as well as helped find other random purchases easier. I would like to see this service remain complimentary but I am aware that nothing is free and we all must make a profit somehow. I am still uncomfortable drinking coffee around someone else's computer. I do hope that this service does have restrictions to keep minors out of trouble and filters viewing subjects. if there is any way to prevent service cost to increase to the user, it would be appreciated. if there were to be an inspection of stations after use to control damage and theft most users will not complain.*

*I like the idea of free internet I wouldn't mind supplying my own ink or paper for printing It's hard to concentrate sometime with the background music, so I bring headphones, I like the furniture and seats I think this will be very popular in the future when the word gets out, am afraid there will be a waiting list to get on a computer. A great place for students too, if it stays free, especially during final week.*

*Kind of warm due to the sunlight from above. I typically drag a table and chair into a shaded area along the wall to work*

*I think this is a great idea, free internet at a more urban style mall. Very good marketing strategy for the entire mall. There is no reason to pay for it though because the apple store also has their own free WiFi connection that is located 2 steps from the Connection Court. So far over the duration of my time spent here I have seen a number of curious wanderers come to check out the Connection Court. Today I only came to this mall to check out the Connection Court. Bringing people to the mall should be the ultimate goal of the mall to help out its stores. A+ for effort.*

(Q99)

# Connection Court Users Have Their Say

We're interested in your thoughts about the space. (con't)

*Don't charge a fee.*

*Make it cheap, easy and accessible. Offset expenses by using it as a advertising tool of computer equipment/software companies.*

*Try to control the background noise.*

*This is a great concept. It is very convenient and comfortable. I would probably not use it as frequently if there was a fee, however I may use it from time to time as I dine with friends family and clients, and shop with family at the Shops of Willow Bend.*

*Thank you for continuing to keep this free to the public.*

*More laptops.*

*I would agree, The Connection Court is a terrific idea for the progressive professional in the DFW metroplex or anywhere for that matter.*

*Thanks for asking. well done. good luck! thanks for the Macintosh support.*

*Great Concept. Can't go wrong. Cheers!*

*I love it! It's great.*

*I like the space*

*Convert this into a normal offering at the mall*

*Good concept. Main Street at Prestonwood just a mile away is a similar place to work, and I work there one day a week. The meeting area and ability to print are two unique things here. I would like the option to call and reserve the meeting table/whiteboard, since I do not feel I could schedule a meeting here unless I knew it was available. I have a home office, but like to get away one or two days a week to Starbucks, Prestonwood's Main Street, or other hotspots in the area. Thank you!  
David Raney*

*PLEASE keep the wireless hotspot FREE...I'd be glad to continue to receive Willow Bend marketing materials in return 4 free wireless access. 2. its too COLD, at least make the air flow more indirect rather than be a cold blast from every direction 3. the mall music is sleep inducing, next time I'm bringing my own or opening up a classical radio station on my laptop and listening 2 it with headphones instead... 4. fix the PRINTER, its STILL broken*

*Wonderful idea but not at a charge.*

*This is a good idea for those who want to incorporate some amount of work into personal time or errand time.*

(Q99)

# Connection Court Users Have Their Say

## We're interested in your thoughts about the space. (con't)

*Please don't assume this service would only be enjoyed by businesspersons. I had trouble answering several questions in the survey because they were only oriented toward business-application.*

*When Saks Fifth Avenue opens, Connection Court will be in too much of a high traffic area. OR... it would be nice if Connection Court overlapped with the food court. I think this is a wonderful idea and a great way to get people into the mall.*

*I think this was a great idea...its convenient, innovative.*

*Thanks for the service!*

*I think it is a great idea and I hope to see more laptops available.*

*Very nice relaxing area.*

*Keep my business, keep it open. It's a great service and you're on the cutting edge. This is a certain way to differentiate yourselves from other nearby malls, and as I've said before and you well know, you \*need\* the traffic and the business. Right?*

*Love the comfortable chairs and the dry erase boards. It's cute and I can see it expanding.*

*It was too sunny (from the windows above) when I was using the laptops. It was very uncomfortable and the glare on the monitor was bad.*

*I am very pleased with the idea that Connection Court is available to anyone almost anytime, conveniently located near my home and is the best location for meeting clients of a home-based business.*

*It is set up well. It's comfortable to use and easily accessible from the parking lot.*

*Keep the internet access free and charge for other services.*

*For my situation, i.e., small, local, technology consulting business, looking to stay virtual as long as possible and not rent space, this service is a 100% match. Happy to pay for it, my only concern is accessibility and reliability. I have a fiddled with a business plan to do something similar and would be interested in your business model/plans.*

*Try to avoid a fee for usage.*

*It is a great space because it offers large desktop areas for spreading out materials to do work.*

*I think this is a good idea as long as it is free.*

*Serve espresso based drinks at the cafe :) Also, it seems that there were a few people there that make this their office. There should be a policy in place to make sure folks don't abuse this and make it a nice, comfortable, free-flow work environment.*

(Q99)

# Connection Court Users Have Their Say

We're interested in your thoughts about the space. (con't)

*Thank you for this service. This is the direction every public space will have to go ... mall, airport, etc. if they expect people to visit or spend money.*

*Great amenity.*

*Background music is too loud.*

*Like it. Will use it while it is free.*

*Direct fee will not be a welcome strategy. The indirect benefit of having Connection Court service in a mall should be able to create some better business model to cover the cost.*

*It is very clean and brightly lit. If I was self employed I would use the area as a second place of work or when I needed to meet with people during the work day.*

*It's really good but problem is privacy. I think there should be little cube to provide privacy to do work.*

*The last time I came to CC, I had to wait along with another woman. I started a WAIT LIST on the provided White Board.*

*Nice place but something more on the lines of a store that is converted to a remote business office would have been better. Found myself to be distracted several times by people walking by.*

*The registration/logon instructions were not correct for using a PDA. I had to first register using one of your computers before I could logon with my PDA. Your registration site did not recognize the browser on my PDA as being Internet Explorer, although it is the mobile version of IE. Your instructions state that PDAs can be used but the extra steps for registering are not mentioned. I had to go to Connection Court twice before I figured it out on my own.*

*I love it, don't make people pay for it, because honestly I don't think many would!*

*it's a very nice place to do a little work*

*Make it more comfortable (sofas and tables). It also needs a place to rent or use games, cards, DVD movies, etc... You might even have a small setup for users to purchase items for computer use at discounted prices like cd-r's or cd-rw's, laptop mice, batteries, (but not over-priced retail stuff)*

*This is great idea. You've done a terrific job outfitting the Connection Court. I will definitely return on my frequent visits to N. Dallas on business and have (and will) recommended your facilities to my colleagues. Thanks!*

*I enjoy using the Connection Court. I like the atmosphere and the environment. I appreciate this service and will recommend it to others.*

*I'd like to see more electrical outlets, for example, at the group table near to the coffee shop; and more desks for those not needing the provided laptops. Also, using my own laptop, I am concerned about theft if I need to step away to use the facilities - I have my own lock, but it was hard to find something to lock it to. If you do start charging, I'd be most likely to pay monthly, as long as no commitment/contract was required.*

*Love the idea. Give away the internet and increase traffic to the mall and revenues.*

(Q99)

# Connection Court Users Have Their Say

We're interested in your thoughts about the space. (con't)

*The only way I would continue using the CC is if it remains free. It brings me into the mall when I wouldn't normally be there.*

*I like the idea. If the price is really affordable, you will have lots of customers*

*Primary background noise coming from TVs at CC's Coffee. See most people using Connection Court laptops for games (teenagers). Have talked with several other adult, business users - they seem pleased. I would not use this location for a meeting with several other people - would not want them to have to walk through parking lot, fight crowds in mall, find location - and then work in an open conference room subjected to distractions and noise. It is okay for me - I know what I am getting into and can concentrate - in a meeting situation, others may not be able to concentrate.*

*Needs to remain free.*

*Some distractions by non business users.*

*You need to get T-Mobile Hot Spot if you plan to charge for the Connection Court. Otherwise I will stop using it and go back to Starbucks across the street.*

*It would be nice to have a few 2-person desks where you can fit 2 people with laptops and they can plug into an outlet and work comfortably side-by-side. There are some nice group areas, but those areas do not have power outlets and most laptops have limited battery life.*

*THANK YOU FOR THE SERVICE & CONVENIENCE! HOPE YOU FIND A VIABLE BUSINESS MODEL!*

*Look at what the Austin area is doing with free WiFi.*

*Overall, the Connection Court is one of a kind. There is no other free internet service with use of a computer. But at times I've had to wait for a computer. Also, there is no support staff to help with technical problems, which I've encountered. I would suggest it become a bit more library like, i.e. more big tables to lay out papers. Perhaps some task lighting. but it should stay open in the mall public space.*

*To make sense of some of my answers, you need to know that I am a teacher, so I have summers off. The summer really the only time I am able to use Connection Court. I use it (and other locations) to write fiction. All the answers up until the choose your profession question pertain to my summertime writing. After that, the questions were all about my employer and being employed full-time, but as a teacher I am really self employed as a writer during the summer.*

*This is a novel concept, and it's great. However, keep it free. People WILL NOT come to Willow Bend mall to use the internet if it is not free. If they have to pay, they might as well go to Starbucks. Or, why pay at all if there are so many other places that offer free Internet.*

*Great idea...keep it free.*

*Thanks for being there! it really helped when I needed it.*

*Awesome!*

(Q99)

## Key Findings

- Background & Methodology
- Executive Summary
- Key Findings
  - Connection Court User Profile
  - How People Use Connection Court
  - User Evaluations of Connection Court
  - Connection Court and Alternative Work Settings
  - Pricing Connection Court
  - **Connection Court Users Have Their Say**
- Appendix: Traffic Patterns



# Connection Court Users Have Their Say

We're interested in your thoughts about the space. (con't)

*I love your concept! I think you would have great success in duplicating it in most mall locations. The benefit to the mall makes it cost-effective for them to subsidize your operation and maintenance. I would like some sound buffering - shrill noises from the shopping area is distracting. Also, having a soda/snack counter would be nice - not all of us can drink coffee. Thanks for having the news and OLN to watch while working along. It's a great feature!*

*It is much better that you do not charge for this service.*

*I think it is a great idea. But needs to be advertised well and made convenient for people. Also have knowledgeable support onsite to help assist users.*

*Needs electric outlets at the locations where meeting might be help such as near the round tables and lounge area.*

*Keep it free!*

*The space is great but seems to be miss matched to the decor of the mall. The seating areas throughout the mall are great and should be taken into consideration for the look, style and comfort of this area.*

*Bigger chairs would be nice (I am 6'2).*

*.My wife and I love the Connection Court.*

*Expand the number of workstations. Offer fax, copying and FedEx type services. Sell CDs and software.*

*Wonderful idea and facility - keep it free.*

*Keep it up - valuable added service to attract customers like me!*

*It's a **\*\*great\*\*** idea. The area does feel a bit too open and non-private for doing important business work. Part of that comes from the really high ceilings in the area, but a good portion also comes from having your back to corridors where every person who walks by can see what you're working on. The high ceilings also make the area prone to ambient noise and echoes that are distracting. Someone needs to redesign or at least tweak the login page that comes up with you first try to access the internet. It took a bit for me to figure out what I needed to register and create my login before I could use the system. I was expecting there to be a password posted at the machines to use.*

*It's great. I like that there were actual computers, actual laptops, actual desk-space, actual printers, etc. I see a value in having occasional internet access for mall patrons (i.e.: kiosk). I also see the value of providing an alternative workspace. Coffee-shops are good for solo-work, or work with 1 other peer, but it's still not very professional. The mall space (Connection Court) is really nice, and seems conducive to actual work-work, but might be difficult to pitch that it is a true alternative workplace.*

*It's a very nice setup, but once you start charging for it I'll stop using it.*

(Q99)

# Connection Court Users Have Their Say

We're interested in your thoughts about the space. (con't)

*I hope you can make your business model work without charging for use of the wireless connection. It will certainly encourage me to stop and have a cup of coffee and check my email.*

*I love the concept. Its comfortable and I can be productive.*

*The software needs to be clear and concise if guests have to log on while using the Connection Court. There have been several times and tries at each setting having to page back and forth just to see if the software loaded the last entry. Several people have been unable to connect and become very frustrated and leave. There needs to be someone on site to help with technical issues, that cannot be solved by the guest or the concierge staff. Some people are able to log on and create user names and passwords, while the others who are not able to, become frustrated and eventually leave. There are spouses who go there to check email and wait on their wife/husband who have mentioned to me that the Connection Court is the only reason they come along and if the Connection Court does not work, they will not visit the mall again. This, to say the least is very frustrating to guests. It seems they feel teased by the fact that they are sitting in front of a perfectly good laptop but are still unable to complete a simple task like checking their email.*

*I would definitely tell others about this place. Would really like to see it in malls around the country/world.*

*If you decide to charge connection fee.... then should allow connections in food court.....*

*Nice idea. Low-cost is the key. Wireless access is the water fountain of the new millennium. Charge the retailers in the mall a fee as part of their monthly lease on the theory that it draws traffic for them. Do you charge kids to play in the play area in the mall?*

*I hope you keep the Connection Court. I believe it is a great value that sets this mall apart from the others. Considering the tenant lease rate here and how high the costs are, this service will draw in people who would not otherwise shop here.*

*More privacy - more power outlets. Love the whiteboards, but they are a little too public.*

*The idea of a free web access in a mall is a great idea.... It would be extremely nice if it could remain free for the end users, and be supported by donations, ads, and scheduling corporate business meetings for a fee.*

*You should not ever charge for the use of the Connection Court.*

*The only problem is the somewhat lacking coffee shop and the proximity of other food sources. Also, I don't see any restrooms from where I'm sitting. If I have to pack up my laptop every time I get hungry or need a drink, I get frustrated and am likely to leave.*

*I hope you keep it free. I would not mind ads from retailers around or on the computers to keep the access free. Also add more stations with computers.*

*Enjoyed using for free.*

*it's nice and it's been nice so far, pleasant, useful, and convenient, like the atmosphere and enjoy the flexibility and appreciate that it can be used as an alternative break to the office or car....*

(Q99)

# Connection Court Users Have Their Say

We're interested in your thoughts about the space. (con't)

*Need more free laptops in place. Also registration process could be easier. The paper and ink is sometimes not keep up on the printer. Also at least one more printer, especially for when people bringing their own lapa in add too many jobs to the print queue, and slow things down.*

*Keep it free if you want it to draw people to the mall. Use it to promote business in store and don't concern yourself with it becoming profitable. Think of all the people that can use it and then pick up that gift they've been meaning to get. Or even get sponsored links to help pay for it.*

*Great idea. I look forward to using Connection Court as a getaway from home and having lunch here and possibly shopping if I need something ... GREAT CONVENIENCE!!!*

*Very well laid out. Easy connection and good coffee.*

*I liked the central location and the comfort.*

*I will not go there if it is not free. Also you need to put in a place to eat and drink and a closer bathroom.*

*Thanks!*

*Free is good.*

*Don't get greedy or stupid!*

*More of a food selection.*

*The service is great. If it remains a free service I will continue to visit the mall to use it. if it becomes fee based then I will most likely use TMobile hot spots because I am already paying for it for unlimited usage nation wide.*

*Great idea...hope it brings traffic into the mall as well as being a nice convenience for people who are already here.*

*Seems like great place, but a little inconvenient to come inside the mall, that's why if it was charged I probably wouldn't come, whereas Starbucks is right next to my house.*

*Thanks for offering the hot spot.*

*Very comfortable. Much better than Starbucks or the Main Street Bakery. I was able to do some shopping after I finished up at Connection Court -- a big plus for me.*

*It's a great idea. I really like the way you also have wi-fi, even though I didn't use it - I used your laptops. The free part is the best part. It doesn't cost that much to run wi-fi - the merchants could probably pick that up without too much trouble, and it would bring more people into the mall! I wish you were closer, or that our mall would offer such a service.*

(Q99)

## Key Findings

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- **Appendix: Traffic Patterns**

# Traffic Patterns

## Traffic Patterns at Connection Court

Panasonic's Web camera captured images at Connection Court on a regular schedule during June through August, and for several days in September. We randomly selected and examined images from roughly 30% pilot days between June 14<sup>th</sup> and September 9<sup>th</sup>.

In an average week, there were about 80 visits to Connection Court, for an average of about 12 visits per day. We didn't attempt to track people as they moved in and out of the space, therefore some portion of visits we counted as a new occurrence were actually part of a single visit. For example, a user captured on camera at 12:40 was counted as a visit, and he counted for another visit when he was still in the space at 2:40.

Connection Court saw more use on weekdays, which accounted for about 80% of visits, than weekends, which accounted for about 20% of visits recorded. The weekday average was roughly 13 visits per day, and on a weekend day, an average of 8 users visited to Connection Court.

No single day of the week saw significantly more traffic than any other day. Rather, usage was spread fairly evenly across all week days between Monday and Friday.

Connection Court is busier during daytime hours, roughly (9am to 4pm). After 4pm, visitors to Connection Court are quite scarce. Roughly half the activity at Connection Court takes place between 8am and 11am, and 40% of the visits are between 11am and 4pm. Visits after 4pm account for about 10% of Connection Court traffic.

Usage was higher in July and August than in June. We determined there were not enough photos to characterize the month of September in comparison to other months. The busiest week of the trial appears to have been the week of August 9<sup>th</sup> - 15<sup>th</sup>.

# Traffic Patterns

## Traffic Patterns at Connection Court

On average about 5 or 6 meetings occurred over the course of a typical week, consisting most often of 2 to 3 people. Meetings were mostly conducted in the conference area.

The images we examined show users working mostly alone, either at the desks provided, or using their laptops in the extended seating area. The slides on the next page show typical usage of Connection Court.

# Web Camera Recordings

## Connection Court Users

