

The Fate of Gender-Affiliated Products in Mass Merchandising

Stephen C. Jones

Department of Business & Economics, Arkansas Tech University

Tami L. Knotts

Department of Management, Bridgewater State College

Gerald Udell

Center for Business & Economic Development, Missouri State University

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Abstract

This paper examined the factors that are critical for small health and beauty aid (HBA) manufacturers to become Wal-Mart suppliers. The sample firms for this study were small HBA manufacturers who participated in a mass merchandising screening program. Participating firms submitted their product for external evaluation, and each product was either rejected or sent on to the mass merchandiser for buyer review. Exploratory factor analysis was used to determine the factors that were critical in deciding which products were suitable for Wal-Mart's buyers to examine. Owner gender and product gender were also examined using chi-square analysis and independent t-tests. We found that mass retailers wanted HBA products that have demand stability and low risk potential, and male-owned firms seemed to have better success in the mass merchandising marketplace because of the type of product that they submitted. Only 31 percent of male-owned firms submitted gender-affiliated products compared to fifty percent of female-owned firms. In our study, gender-affiliated products were found to be less successful than unisex products at getting forwarded onto Wal-Mart for buyer review and at receiving actual shelf space.

Introduction

In the health and beauty aid (HBA) industry, gender-neutral products gained popularity during the mid-1990s, only to lose their appeal to gender-affiliated products that catered to the individual needs of consumers. This decline in unisex products was partly attributed to a shift in customer perceptions. Consumers no longer wanted a one-size-fits-all approach; instead, they wanted health and beauty aids that were specifically his or hers (von Hoffman, 2006). What this has led to is an overabundance of brands and an overly complicated purchasing process. Simply buying shampoo involves a plethora of consumer decisions ranging from whether more volume is needed to which color enhancement is best. Other health and beauty aid products such as toothpaste are experiencing the same problem—too many decisions based on too many choices on retailers' shelves.

While the majority of sales for health and beauty aid products are through mass merchandisers, drug stores, and supermarkets, only mass retail stores like Wal-Mart can offer

customers low prices and complete product lines. This paper focuses on gender-affiliated products and their fate in the mass merchandising marketplace. All of the products in this study are health and beauty aids that were produced by small manufacturers and submitted to a supplier screening program for Wal-Mart. We begin by describing the health and beauty aid industry, followed by a discussion of product gender and Wal-Mart's effect on the HBA market. Next, we examine the program results to determine which factors help small manufacturers get their product reviewed by Wal-Mart. We also investigate the role of owner gender and product gender in the evaluation process.

Literature Review

Health and Beauty Aid Industry

Discussion of the health and beauty aid industry, while seeming to be a homogenous term, actually finds a more complex market than realized at first. The overall industry (NAICS product code 20160) is described as "Drugs, health aids, beauty aids, including cosmetics." Seven subsections show the diversity of the industry:

20161: Prescriptions

20162: Nonprescription medicines

20163: Vitamins, minerals, & other dietary supplements

20164: Health aids, incl first-aid products; foot prod; prescription access; eye/contact lens care prod; convalescent aids; ortho equip, exc shoes; medical, surgical, or dental supplies; & artificial limbs

20165: Cosmetics, including face cream, make-up, perfumes & colognes, etc.

20166: Other hygiene needs, including deodorants; hair & shaving products; oral, feminine, & baby hygiene needs; hand products; etc.

20167: Hearing aids & supplies (www.census.gov)

Of interest is that the first three sub-groupings, all dealing with medical and nonmedical treatments and supplements, accounted for more than 70 percent of the industry's 2002 sales, with prescription drugs at over 60 percent of industry total sales.

Various retail industries in the 44 and 45 NAICS industry sections (retail) record sales of the 20160 products, including less expected ones like gasoline stations (447) and florists (4531). Generally, outside the main 11 retail industries that record significant sales of one or more subsections of 20160, retail industries that sell HBA products account for less than one percent of category sales. Additionally, these industries do not rely on 20160 sales for critical levels of net sales (generally less than one percent), so these peripheral sales categories have been ignored for the purposes of this paper.

Product Gender and the HBA Market

From 1993 to 1997, unisex fragrance was the fastest growing segment in the health and beauty aids industry in the United States. With a growth rate of 29.5 percent each year, unisex fragrance represented more than 10 percent of the entire fragrance category (Bucalo, 1998). According to Euromonitor, the unisex fragrance segment also showed strong growth from 1995 to 1999 for countries such as Spain, Germany, and France (Landau, 2000). By 2000, however, sales for gender-neutral fragrances in the United States and Europe were declining, and consumer preferences had shifted to more gender-specific products.

The decline of unisex products in the health and beauty aid industry has been attributed to the short life cycle that fashionable products experience after their newness wears off (Landau, 2000). Consumer perceptions have also changed. According to von Hoffman (2006), consumers view themselves as either very feminine or very masculine and, therefore, they desire products that fit their needs. The all-in-one or unisex product does not cater to individual differences or support the images that consumers have of themselves. As stated by Scott Moffit, Senior Vice President of Personal Care for Dial Corp., "Most brands are having to make the choice: are they going to be a male brand or a female brand rather than a unisex brand" (von Hoffman, 2006).

This shift toward gender-affiliated products has led to brand proliferation. With so many choices, consumers have to make multiple decisions in order to select the right product. What works for one consumer may not be the right choice for the next, making the purchase process overly complicated. This fragmentation may lead to product simplifications in the future and the return of the gender-neutral product (von Hoffman, 2006).

Wal-Mart and the HBA Market

As the world's largest retailer, Wal-Mart sells more in the first quarter alone than other mass merchandisers do all year (Fishman, 2003). With 2005 sales of more than \$310 billion (moneycentral.msn.com, 2006) and a growth rate of 10 percent (2002-2006), the Bureau of Economic Analysis report shows that Wal-Mart's total revenues accounted for more than 2.5 percent of the U.S. gross domestic product in 2006 (www.bea.gov). Wal-Mart also has strong customer loyalty. Shoppers with even the most negative view of the retail giant still visit the store at least five times per year and spend almost \$500 (Shapiro & Foote, Cone, & Belding, 2003).

In the health and beauty aid industry, Wal-Mart accounts for 30 percent of national sales for HBA retailers. The U.S. Census Bureau (2007) reports that sales in the health and beauty aid industry (NAICS 44611) alone increased from \$77.8 billion in 1992 to \$174.2 billion in 2005, making Wal-Mart's share of this market approximately \$52.3 billion in 2005 (Fishman, 2006). Procter & Gamble and Dial Corporation, two of the largest health and beauty aid manufacturers, have strong relationships with Wal-Mart. Both companies admit that the mass retailer sells more of their products than their next nine customers combined (Fishman, 2003; 2006).

In this paper, we focus on small health and beauty aid manufacturers wanting to become Wal-Mart suppliers. Becoming a Wal-Mart supplier is not easy, especially for smaller firms. Wal-Mart executives' estimate that about 0.33 percent of small manufacturers actually get their product reviewed and on-shelf at the mass merchandiser because buyers already have established contracts with larger firms (Udell, Atehortua, and Parker, 1995). Using the results of a mass merchandising screening program, we evaluate the success rates of firms with gender-affiliated products versus those with unisex products in the health and beauty aids industry. Success for these manufacturers meant getting their product reviewed by Wal-Mart. Gender of the firm's owner is also examined. The supplier screening program is explained below.

Program Background

The sample firms for this study were small manufacturers who participated in a mass merchandising screening program developed at a regional Midwest university. The screening program consisted of two assessments: an external review of the firm's submitted product and

a self-appraisal of the firm's management practices. For the purpose of the paper, only the product evaluation measure will be examined, and specific items can be found in the Appendix. Each product was either rejected from the program or sent on to the mass merchandiser for buyer review based upon the results of these evaluations. The final decision as to whether the forwarded product was placed on-shelf was left entirely to the retailer.

All of the participating firms were independently-owned manufacturers who wanted to be suppliers for Wal-Mart. Out of 2113 potential suppliers, 1690 firms (80.0 percent) completed the evaluation process. Of these, 185 manufacturers represented the health and beauty aid industry. These participants were from all states, and none were dominant in the industry. Health and beauty aid products ranged in suggested retail price from inexpensive and/or point-of-purchase to major purchase levels. No racial, ethnic, or other minority data were kept as part of the main database.

Product Evaluation

The product evaluation instrument consisted of 41 items based on the Product Innovation Evaluation System (PIES) developed at the University of Oregon (Udell, O'Neill, and Baker, 1977). Product areas included societal impact, business risk, demand analysis, market acceptance, competitive capabilities, and experience and strategy. An independent, trained evaluator completed this portion of the assessment process. The independent evaluator was typically a current or former retail buyer or an experienced small firm owner with a retail background whose role was to assess the mass market potential of the product.

Products were judged on a five-point ordinal scale using specific achievement levels rather than a sliding subjective scale. The three-point (or middle) response was the minimum performance level acceptable to retail buyers. The independent evaluators rated each product using items like the one below:

Functional Feasibility. In terms of its intended functions, will it do what it is intended to do? This product:

- (1) Is not sound; cannot be made to work.
- (2) Won't work now, but might be modified.
- (3) Will work, but major changes might be needed.
- (4) Will work, but minor changes might be needed.
- (5) Will work; no changes necessary.

Methodology and Results

There were 185 manufacturers in the health and beauty aid (HBA) market that proposed to become suppliers for Wal-Mart by participating in this program. Of these, 123 (66.5 percent) were independently judged to be unsuitable suppliers while 62 (33.5 percent) were successful in being forwarded on for buyer examination. Of these judged suitable, 8 firms (3.1 percent of the original group) were ultimately successful in making it to the mass merchandiser's shelves. Reasons for denial of a forwarded firm's product included market need for the product and other retailer specific issues rather than actual inferiorities in the firm or the product. Because this last group was too small for statistical testing, we used the initial decision level (forwarded or not forwarded to buyers) for our study.

In this study, we wanted to specifically examine firms that were up for review for placement in Wal-Mart's HBA departments. This market is of importance because of its impact on the economy in general and on Wal-Mart's bottom line in particular. As mentioned earlier, while Wal-Mart is a major retailer for HBA (NAICS 20160) products, there are 11 industries classified in the NAICS system that were identified as major retailers of these types of products.

These industries include:

- Supermarkets and other grocery (except convenience) stores (44511)
- Convenience Stores (44512)
- Pharmacies & Drug Stores (44611)
- Cosmetics, beauty supplies, and perfume stores (44612)
- Other health and personal care stores (44619)
- Department stores (except discount department stores) (452111)
- Discount department stores (452112)
- Warehouse clubs and supercenters (45291)
- All other general merchandise stores (45299)
- Electronic shopping and mail order houses (45411)
- Other direct selling establishments (45439)

Table 1 shows the rank of each retail industry in terms of the total sales per NAICS product 20160 category (all sales figures in this discussion are from the 2002 economic census). As can be seen, Pharmacies account for the largest portion of total HBA sales. In fact, this industry accounts for 60 percent of total HBA sales nationwide. However, as shown earlier, prescription and non-prescription pharmaceutical products and other supplements (NAICS categories 20161 through 20163) account for 60 percent of total HBA sales, and pharmacies rank no higher than second for all other 20160 categories. HBA sales make up over 80 percent of industry sales, and prescriptions are 70 percent of total sales. Outside of drug and supplement sales, all other HBA categories account for about eight percent of total industry sales. Pharmacies account for some 70 percent of prescription sales, 44 percent of non-prescription sales and 13 percent of supplement sales.

Table 1. Ranks of HBA Store Types Within NAICS Product Codes*								
Health & Beauty Aids (HBA) Industry Sales Areas		NAICS Product Codes						
	20160	20161	20162	20163	20164	20165	20166	20167
Supermarkets and other grocery (except convenience) stores (44511)	2	3	2	3	4	5	1	
Convenience Stores (44512)								
Pharmacies & Drug Stores (44611)	1	1	1	4	2	2	4	3
Cosmetics, beauty supplies, and perfume stores (44612)							5	
Other health and personal care stores (44619)				2	1			1
Department stores (except discount department stores)						1		

(452111)								
Discount department stores (452112)	4	4	4			3	2	
Warehouse clubs and supercenters (45291)	5	5	3	5	5	4	3	
All other general merchandise stores (45299)								
Electronic shopping and mail order houses (45411)	3	2	5	1	3			4
Other direct selling establishments (45439)								2
*Product line descriptions for the NAICS product codes are on page 2.								

Pharmacies, supermarkets and discount department stores each account for about 1/6 of HBA sales outside of categories 20161 through 20163. Wal-Mart's impact on the entire HBA category has already been noted, and its presence in the discount department store industry is large. Overall, in 2002 it accounted for more than 7 percent of total HBA sales and almost 16 percent of the non-drug sales. This last area is the one this paper focuses on. Less than five percent of all HBA submissions in this study had some "drug" component, and all were of the supplement variety. The balance of submissions fell into the last four HBA NAICS categories.

HBA Firms

Exploratory factor analysis was the first statistical method used for this study. This method is used to develop a sense of the main factors used by subjects (in this case the independent evaluators) in critical decision-making. Without established theoretical factors (which would require the use of confirmatory factor analysis), this method helps the research team to determine which items in the instrument combined with others to explain the variance observed in the decisions made by subjects. In this study, we were interested in determining which factors were critical to evaluators in deciding which firms and their products were suitable for Wal-Mart's buyers to examine. Tables 2 and 3 show the results of our analysis. Each table includes the determined factors, the instrument items which created them, the factor's variance explained, and the total variance explained by all factors to that point. Although each analysis generated at least ten factors using all instrument items, factors beyond the point of explaining a total of 50 percent of variation were discarded for this study.

We first looked at firms whose products were judged unacceptable for further review by buyers. Table 2 shows the results of this analysis. Product/market risk explained the largest amount of variance (10.8 percent) for these firms. The amount of effort for the firm (and ultimately the retailer) in making these products accessible and in-demand for consumers was judged to be the most important reason for denying these products further review. Products with long payback periods, higher than acceptable investment and research and development costs, immature commercialization development, low profitability, infeasible production and poor distribution were deemed too risky for further buyer interest. Other factors included limited business experience, poor product demand and performance, and difficulties with consumer acceptance of the product. These critical factors accounted for a total of 52.4 percent of the evaluators' decision making criteria variance and indicated that these objective evaluators found serious problems with how the market would accept the manufacturer's products.

Table 2. Not Forwarded Firm Exploratory Factor Analysis			
Factor	Analysis Items	% of Variance	Total % of Variance
1. Product/Market Risk	Payback Period, Investment Costs, Research & Development, Distribution, Commercialization Stage, Profitability, Production Feasibility	10.8	10.8
2. Business Experience & Consumer Marketing Issues	Financial Experience & Resources, Marketing Experience, Promotion, Marketing Research, Use Pattern Compatibility	9.8	20.6
3. Market Entry & Impact	Legality, Functional Feasibility, Societal Impact, Environmental Impact	7.9	28.5
4. Market Demand	Need, Product Life Cycle, Potential Sales	6.1	34.6
5. Product Acceptance	Potential Market, Visibility, Learning, Appearance, Safety	6.1	40.7
6. Marketing Savvy	New Venture, Promotional Requirements, Sales/Selling Price, Price	6.1	46.8
7. Product Performance	Trend of Demand, Durability, Service, Dependence	5.6	52.4

Next we examined the factors for firms whose products were judged worthy of further buyer review. Table 3 shows the results of this analysis. Consumer marketing issues were most critical for this group. Evaluators credited this group of suppliers with having better marketing experience and practices (such as market research) and with products with better than average visibility, appearance and demand stability. This factor accounted for 11.3 percent of variance. Second, though, was the product/market risk factor which mirrored the same items as for non-forwarded firms. Evaluators judged forwarded firms positively on these items compared to their non-forwarded peers, seeing fewer financial, production and distribution risks. A slightly lower percentage of total variance (10.0 percent) was accounted for by this factor. Market factors such as viability, impact, demand and entry difficulties were determined to be either positive or neutral in their effect on the product's introduction into the market. These factors accounted for a total variance explanation of 55.4 percent.

Table 3. Forwarded Firm Exploratory Factor Analysis			
Factor	Analysis Items	% of	Total % of

		Variance	Variance
1. Consumer Marketing Issues	Promotion, Marketing Research, Visibility, Use Pattern Compatibility, Appearance, Marketing Experience, Stability of Demand	11.3	11.3
2. Product/Market Risk	Payback Period, Investment Costs, Research & Development, Distribution, Commercialization Stage, Production Feasibility	10.0	21.3
3. Market Viability	Technology Transfer, Function, New Venture, Service, New Competition	8.6	29.9
4. Market Impact	Safety, Durability, Environmental Impact, Societal Impact	6.6	36.5
5. Management Breadth	Management/Production Experience, Technical Experience, Financial Experience & Resources	6.5	43.0
6. Market Demand	Potential Market, Potential Sales, Price (Competitive), Need, Product Life Cycle	6.4	49.4
7. Market Entry	Functional Feasibility, Legality, Profitability	6.0	55.4

HBA Owner Gender

Additionally, we examined characteristics of the firms and products supplied by the gender of the HBA manufacturer. This type of study was done before using the entire database with generally no gender-related results (Knotts, Jones & LaPreze, 2003). In that study, we found that male- and female-owned firms had roughly identical success rates in the marketplace (getting forwarded on to mass merchandiser buyers for review) and had firms and products that were judged to be of roughly equal quality by evaluators. However, the manner in which they achieved these results was somewhat different in that male-owned firms seemed to rely more strongly on both a strong firm and product while female-owned firms owed their success more to the quality of the product alone.

Another study, Knotts, Jones and Brown (2008), determined that for female-owned firms marketing factors were more important to the long-term survival of the overall venture while for male-owned firms production factors were more important. In this study, we found that firms and products for HBA manufacturers were, again, judged to be roughly equivalent in quality and market-worthiness, but the strengths of the firm's management seemed to have interesting variations. While the difference in male- (MOF) and female-owned firm (FOF) performance (successful forwarded status) was not statistically significant, some 35 percent of MOF products were forwarded on while only 28 percent of FOF products went for buyer review. Basic reasons for this difference were not apparent from such performance categories as on-market status (product was already on the market in some retail venue), and evaluator determination of firm- and product-readiness to enter the marketplace. MOF and FOF products were of equal performance in these measures.

HBA Product Gender

We decided to peruse the HBA products themselves to see if there were differences in types of products submitted. As shown in Table 4, one difference was immediately seen: FOF products were much more likely to be gender-affiliated than MOF products. Gender-affiliated products (n=65) were judged to be those that were intended for a specific gender (e.g., perfumes and cosmetics) versus those that were gender-neutral (e.g., shampoo and first aid items) (n=120). Fully 50 percent of female-owned firms submitted gender-affiliated products versus only 31 percent of male-owned firm submissions ($p < 0.10$). Could this be the reason FOF products were less successful than MOF products?

Table 4. Distribution by Gender and Product Affiliation

Gender of Ownership	Gender-Affiliated Products		Total
	No	Yes	
Female	20 (50.0%)	20 (50.0%)	40 (100.0%)
Male	100 (69.0%)	45 (31.0%)	145 (100.0%)
Chi-square significance < 0.10			

A series of independent t-tests was run on success measures for gender-affiliated products versus non-gender-affiliated products. Table 5 shows the results of this analysis. While five percent of gender-neutral products made it on to Wal-Mart's shelves, only three percent of gender-affiliated products had the same success ($p < 0.05$). Only 23 percent of gender-specific products were forwarded on for review, while nearly 40 percent of unisex products went on to buyers ($p < 0.05$). There was no statistical difference in evaluator judgment of either firm or product performance and readiness for the marketplace, and both categories had equal percentages of products already on the retail market.

Table 5. Independent T-Tests: Gender-Affiliated Products vs. Unisex Products

Variable	Gender-Affiliated Products		Signif. (p<)
	No (mean)	Yes (mean)	
Owner Gender (female=1, male=2)	1.82	1.69	0.10
On-Shelf @ Wal-Mart (no=0, yes=1)	0.05	0.03	0.05
Initially forwarded to Wal-Mart for review	0.39	0.23	0.05

Discussion

In this study, we first used exploratory factor analysis to determine which product factors independent program evaluators viewed as critical for the mass retail market. While there were some notable differences in the factors and their underlying items, the overall picture is clear. Health and beauty aid manufacturers need to focus on consumer marketing issues, such as promotion, marketing research and use pattern compatibility, in order to supply the mass merchandising marketplace with products that are proven to be safe, reliable, and user-friendly. No customer wants to apply a health and beauty aid product to their skin that has not been adequately tested or is difficult to use. In addition, mass merchandisers like Wal-Mart are not in the business of marketing individual products. Rather, manufacturers are expected to promote their own products and be able to supply them to Wal-Mart with consistent quality and reliability.

Product/market risk was the second most critical factor in determining worthiness for the mass retail market. Low cost development and feasible production capabilities signify firms with effective and efficient infrastructures. These manufacturers have products that require

minimal capital for commercialization and distribution processes that ensure large purchase order fulfillment and on-time delivery. Manufacturers whose products have short payback periods and high market readiness are also attractive as mass retail suppliers. Their commercial-ready products offer a quick return on investment for the supplier and ultimately Wal-Mart and its peers.

As for gender-oriented success factors, male- and female-owned firms were judged to be of similar quality as were their submitted products. However, male-owned firms seemed to have better success on the mass retail market largely because of the types of products they submitted. These firms were less likely to submit gender-affiliated products like cosmetics, perfumes and the like compared to female-owned firms. While the products themselves were judged to be of similar market worthiness, perhaps the selection of non-gender-affiliated products made them more attractive to the mass retailer. Why? Consider the market for gender-affiliated products like cosmetics and perfumes. Perusal of the HBA aisles for these products reveals such major brand names as L'Oreal, Maybelline, Clairol, Revlon, Procter & Gamble, Johnson&Johnson and others. These major firms have large marketing budgets, entrenched brand image, broad product offerings and strong retailer support and commitment. Breaking into these markets could be almost impossible for products in these areas, while unisex products like those more often supplied by male-owned firms would find easier entry.

Conclusions

This paper examined the factors that are critical for small health and beauty aid manufacturers to become Wal-Mart suppliers. The most important factor for health and beauty aid suppliers is consumer marketing. These manufacturers must have products that are market-ready and in demand (e.g., stability of demand) in order for them to enter the mass retail market. Wal-Mart and other mass merchandisers are not interested in developing market demand. They prefer manufacturers whose products have already created strong consumer acceptance elsewhere. Marketing research and experience are other consumer marketing issues that deserve attention. Knowing how and why the product works and being able to reach the right target market with your promotional methods are important for health and beauty aid manufacturers wanting to supply the mass retail marketplace.

A second factor that health and beauty aid suppliers should focus on is risk minimization. Mass retailers do not want to invest in an unproven product that has high product/market risks or low profit potential. It seems that the more developed the firm's production capacity and the product's commercialization potential, the more suitable the manufacturer is for supplying Wal-Mart. For potential health and beauty aid suppliers, their products must also perform correctly and be safe and reliable for them to be considered by mass merchandisers like Wal-Mart.

Finally, while the HBA market may have turned more toward gender-affiliated products in such things as shampoo, toothpaste, deodorant, etc., the selection of a gender-affiliated type of product (e.g., perfume or cosmetics) may cause the small manufacturer some difficulty in getting acceptance onto a mass retailer's shelves. While a good percentage of the manufacturers in our study already had the submitted products on the market, they were looking for entry into the mass merchandising market. Gender-affiliated product types were just as likely as others to have entered the marketplace, perhaps in such areas as local or regional stores, online sales, or smaller chain retailers, but entry into the mass arena presents a new set of

difficulties when dealing with competition from entrenched, internationally-known brands such as Maybe line, L'Oreal and Revlon. Since Wal-Mart and its peers do not market products or brands but rather the retail experience itself, smaller manufacturers of gender-affiliated product types with less well known brands are often advised to choose a different retail venue.

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Appendix: Product Evaluation Criteria (Original Instrument Items)	
Societal Impact	Legality Safety Environmental Impact Societal Impact
Business Risk	Functional Feasibility Production Feasibility Commercialization Stage Investment Costs Payback Period Profitability Marketing Research Research & Development
Demand Analysis	Potential Market Potential Sales Trend of Demand Stability of Demand Product Life Cycle Product Line Potential
Market Acceptance	Use Pattern Compatibility Learning Need Dependence Visibility Promotion Distribution Service
Competitive Capabilities	Appearance Function Durability Price Existing Competition New Competition Protection
Experience & Strategy	Technology Transfer New Venture Marketing Experience Technical Experience Financial Experience and Resources Management & Production Experience Channels: Promotional Requirements Channels: Sales & Selling Price