

Mystery Shopping the Retail Experience: Customer Insights

RBFF STATE MARKETING WORKSHOP

December 10, 2014



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PROJECT PURPOSE

- Assess current retail customer experience
- Impact on customer experience
- Develop areas of opportunity for improvement



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TARGETED MARKETS

Markets/Cities (5)

- Houston, Dallas, Orlando, Tampa, Miami

Store Types (4)

- Fishing - Big Box, Sporting Goods, Outdoor Specialty and Family-Owned
- Boating – Boating Chain, and Family-Owned



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METHODOLOGY

- Phase 1: Store selection, shopper training, survey/form creation
- Phase 2: Stores evaluated; preparation of shopper reports
- Phase 3: Final report created and delivered to RBFF
- Phase 4 : Report findings shared with stakeholders



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Timeline: 4-5 months

SHOPPER DEMOGRAPHICS

- Hispanic males
- Single female shopper (non-Hispanic); 18-35 cohort
- Traditional family (non-Hispanic)

Experience level:

- ✓ Beginner
- ✓ Occasional
- ✓ Experienced



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RETAIL & SHOPPER DETAILS



CURRENT RETAIL CONDITIONS

- Unavailable store personnel
- Poor product knowledge
- Lack of customer service and sales training
- Employee indifference
- Economic impact on disposable income
- Internet sales



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STORES/SHOPPER DETAILS

- Stores – contacted in advance
- Shoppers – quality assurance
- Shoppers – followed one of four scenarios



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SCENARIOS

1. Never fished before – what do I need?
2. Need fishing license
3. Some fishing experience; new equipment
4. Some fishing experience; new places



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SURVEY INSTRUMENT DEFINITIONS

Shoppers ranked the following:

- ✓ First Impressions
- ✓ Greeting
- ✓ Needs Assessment
- ✓ Sales Process Evaluation
- ✓ Close
- ✓ Product Presentation
- ✓ Overall Impressions



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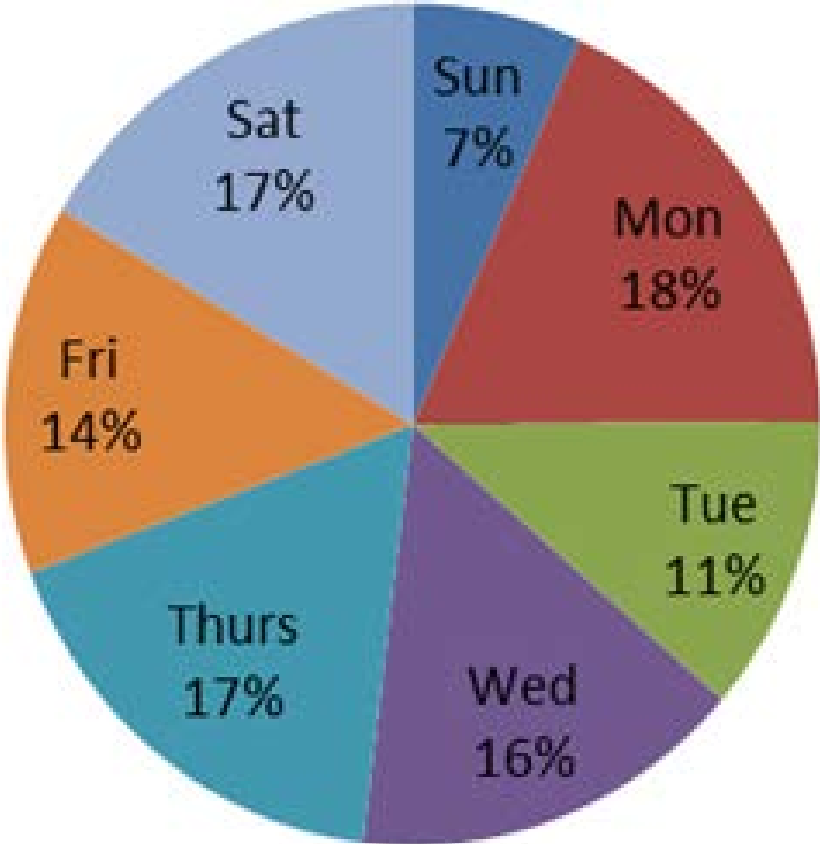
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DATA SUMMARY

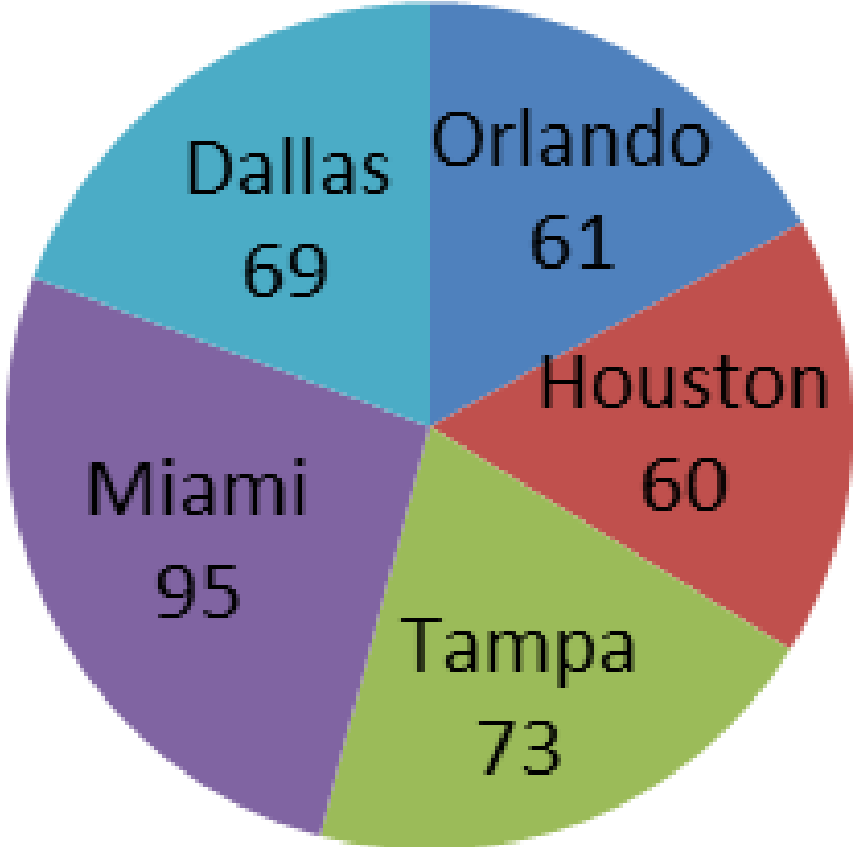


DATA SUMMARY

Day of Week

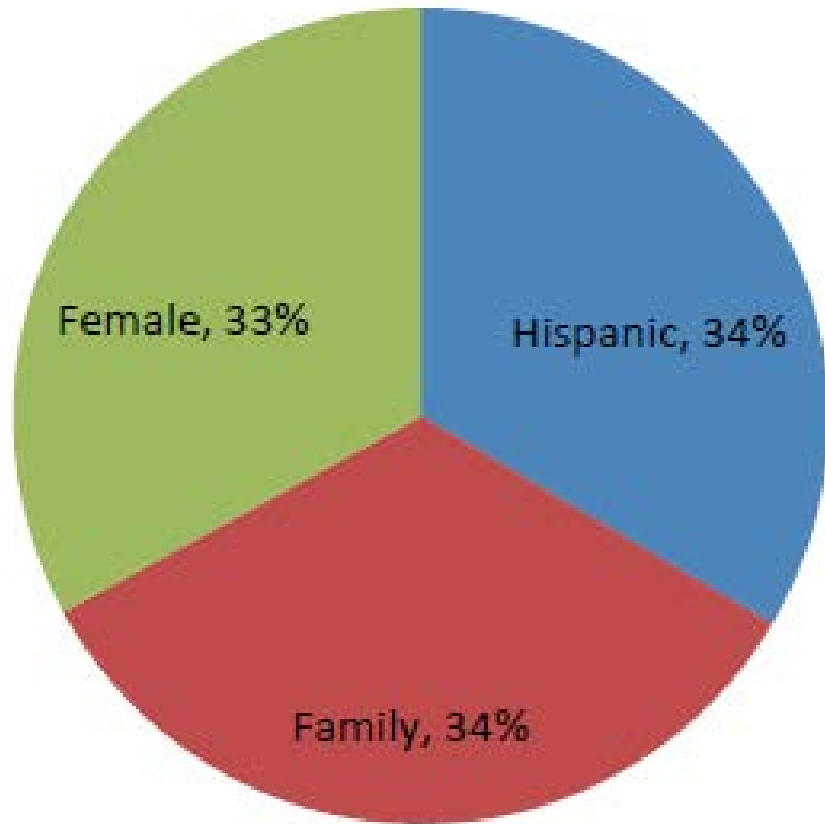


Visits per City

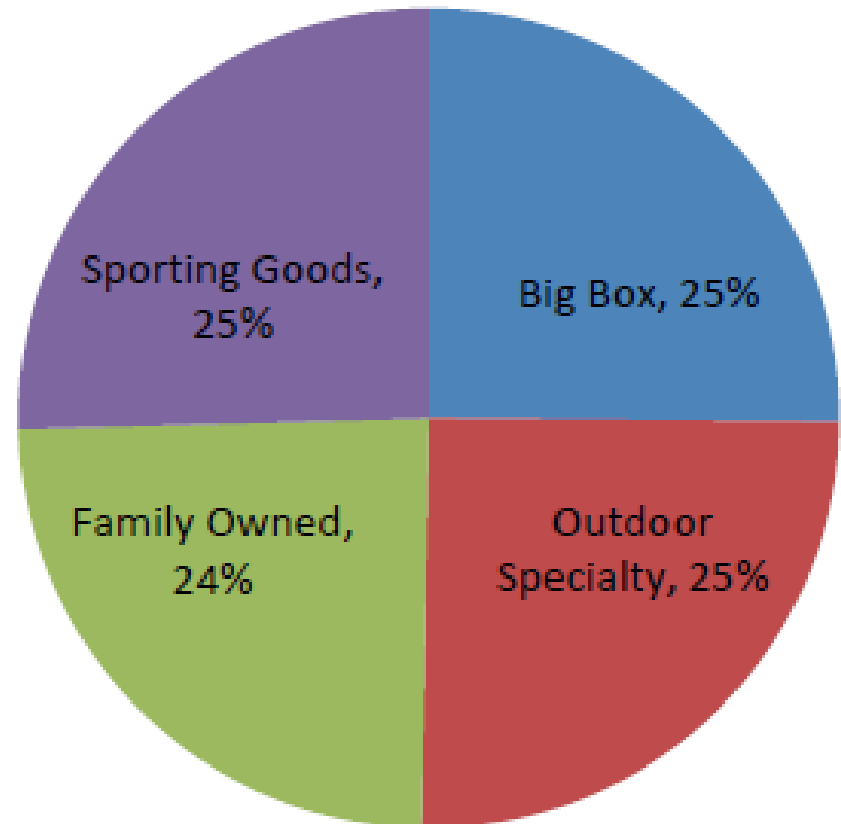


FISHING STUDY

Shopper Demographic

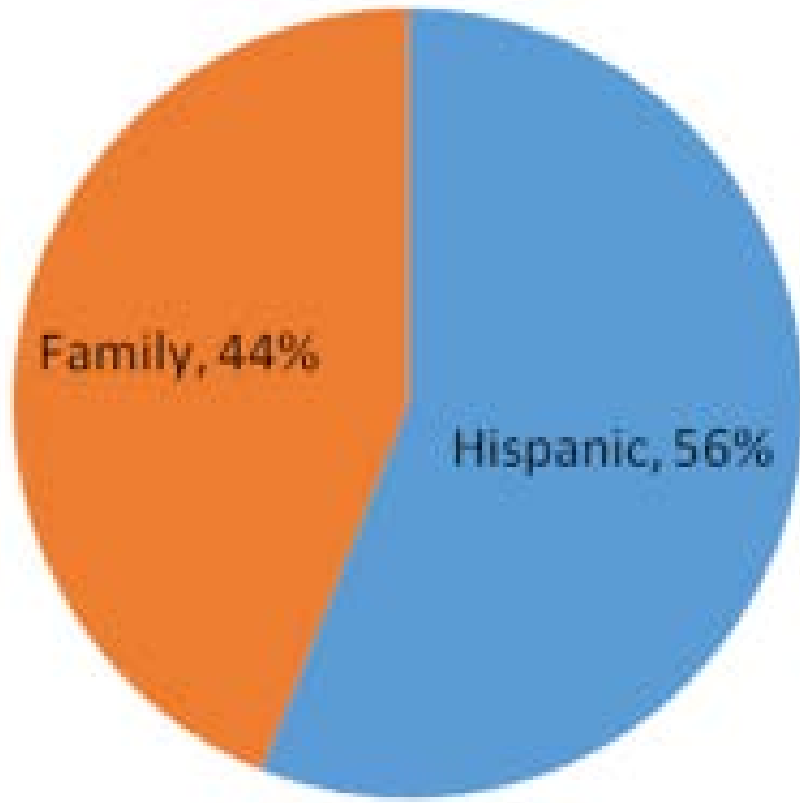


Type of Store Studied

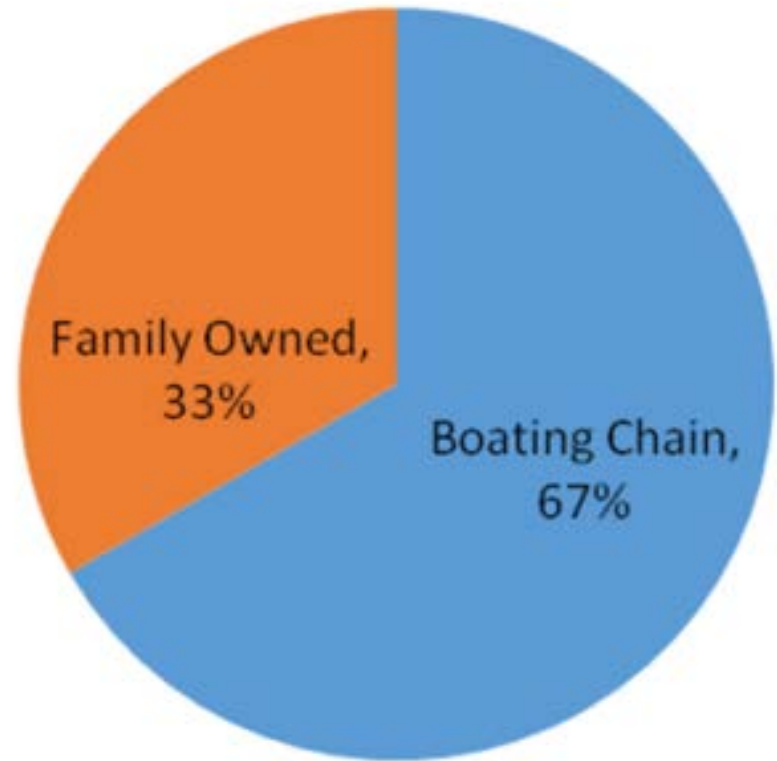


BOATING STUDY

Shopper Demographic



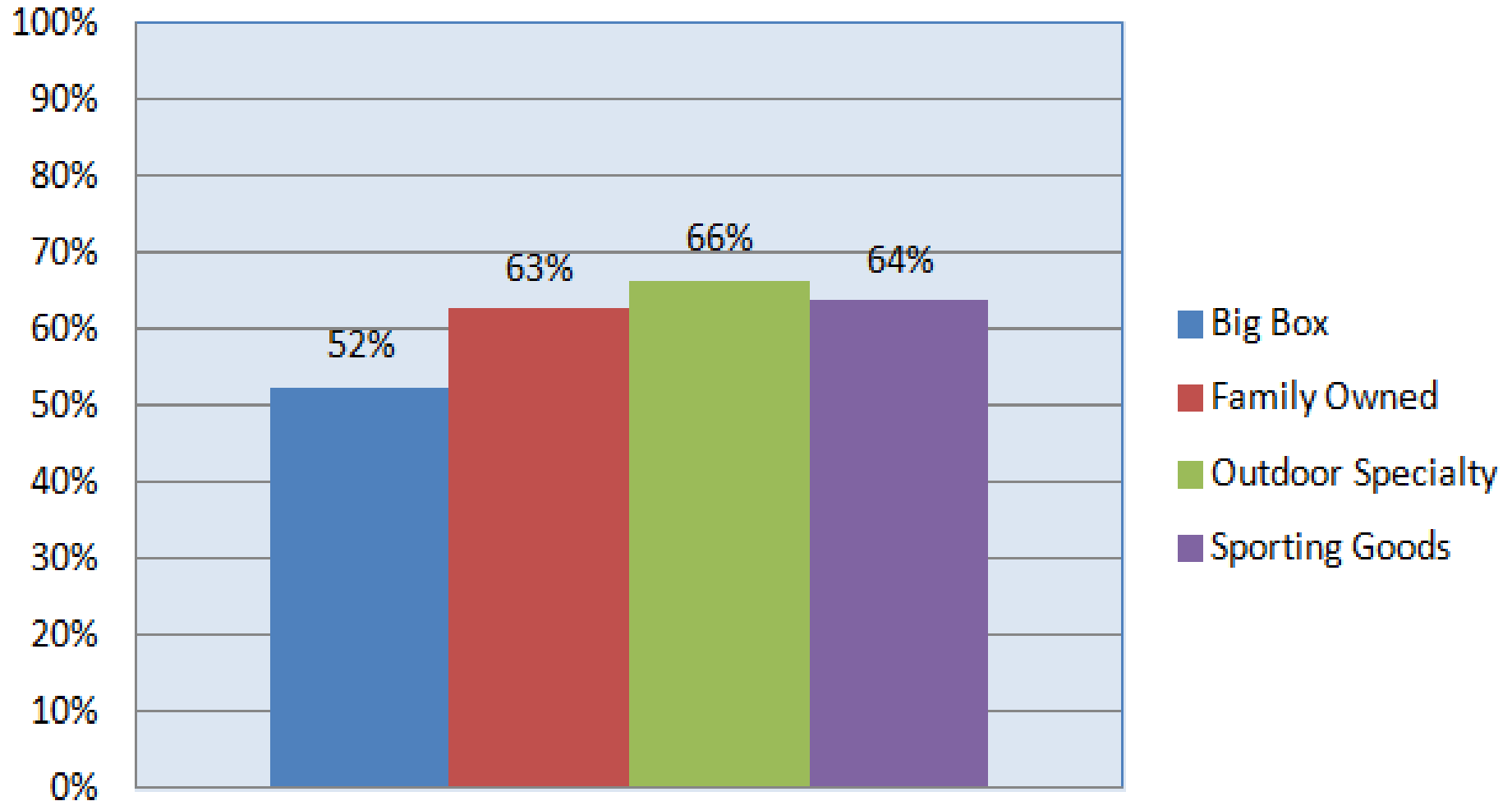
Type of Store Studied



RESULTS & OPPORTUNITIES



RESULTS BY STORE TYPE



TESTIMONIALS

- *“If I needed to purchase a fishing license, I did not know if this sales person would have known how to sell me one...I would not shop at this location for any fishing needs. I was very frustrated by the service.” (-)*
- *“The associate Mitch retrieved was James, who was so enthusiastic about me becoming a novice angler that I actually became excited about fishing myself. He walked me through every single step, from putting on line and hooks, which then led to more purchases” (+)*

✓ Big Box

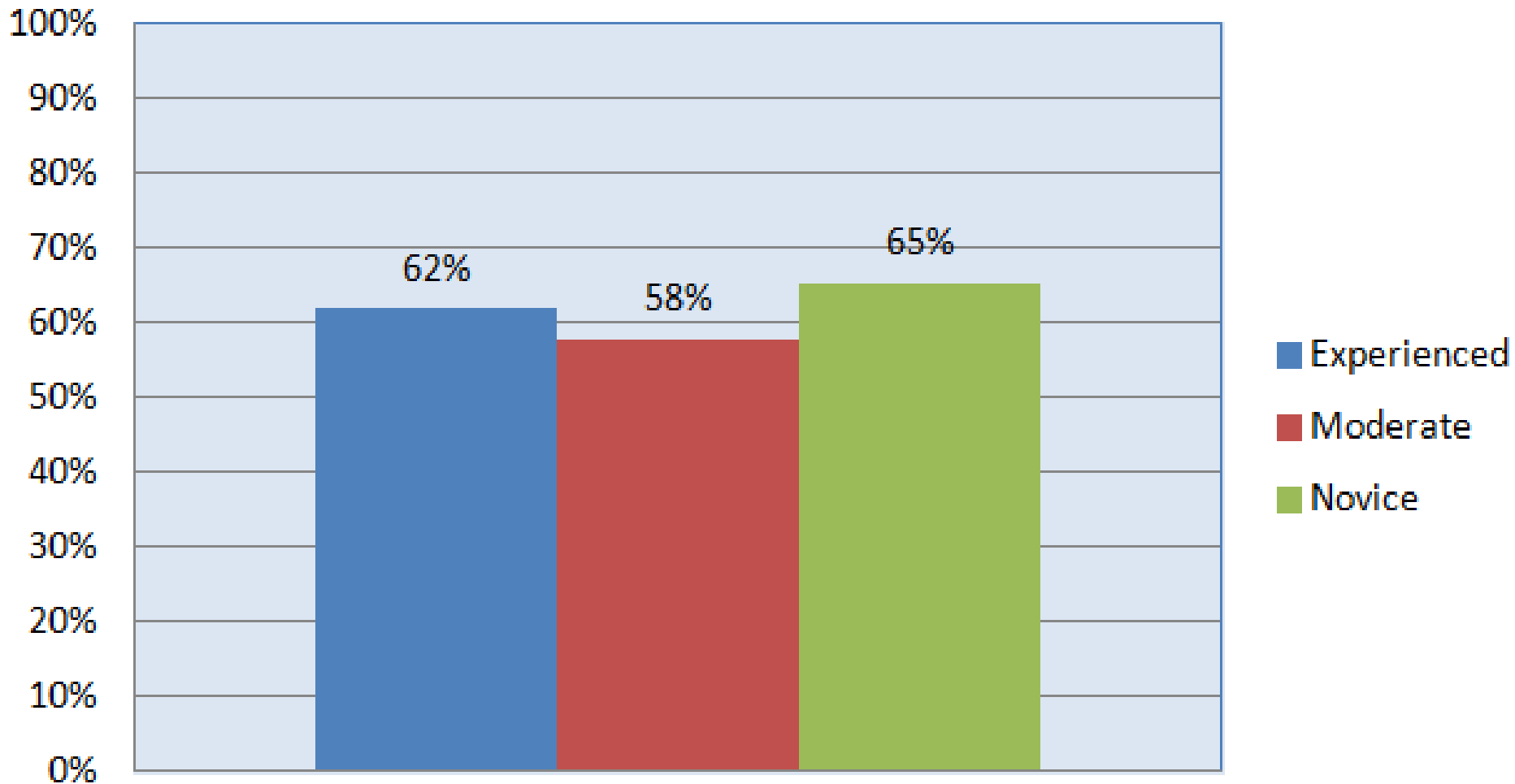


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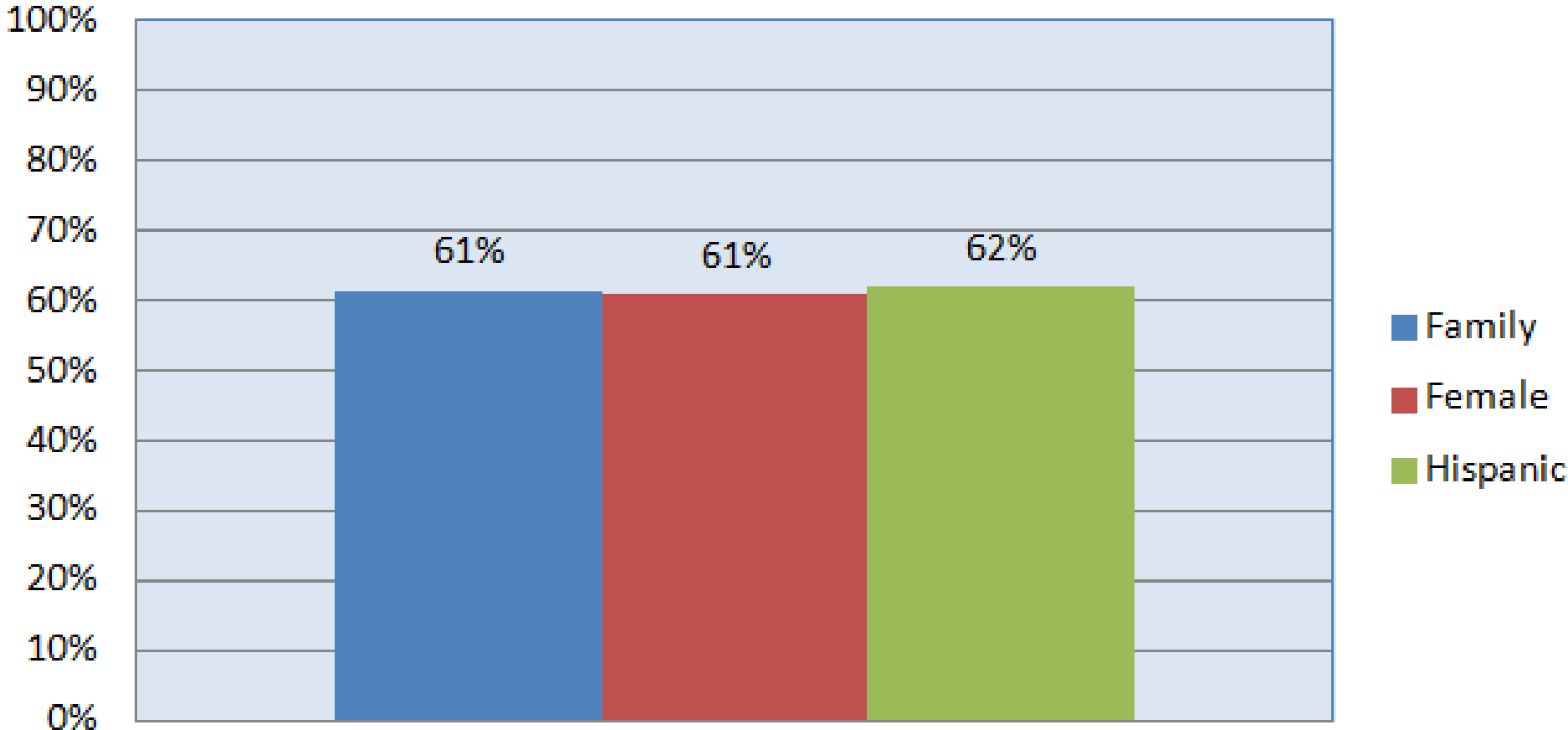


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RESULTS BY EXPERIENCE LEVEL



RESULTS BY DEMOGRAPHICS



CUSTOMER INSIGHTS



GREETING

	Yes	No	n/a
When you first entered the area where fishing gear is sold, were employees clearly identifiable with store attire and/or name tags? (select n/a if you never interacted with a salesperson)	65%	34%	2%
Greeted by salesperson within 3 minutes	36%	63%	-
The salesperson was friendly	88%	12%	-
Determined my level of experience	47%	53%	-



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NEEDS ASSESSMENT (Pt. 1)

New Angler

	Yes	No	n/a
Did the employee ask if you (or your family members) were new to fishing or an experienced angler?	45%	54%	1%
If you told the sales person you were new to fishing, did the sales person ask if you <u>had your license</u> yet?	20%	80%	-
If you told the sales person you were new to fishing, did the sales person ask where you planned to fish?	56%	44%	-
If you told the sales person you were new to fishing, did the sales person ask your familiarity with the equipment?	26%	74%	-



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NEEDS ASSESSMENT (Pt. 2)

Experienced Angler

	Yes	No
If you told the sales person you were an experienced angler, did the sales person ask if you <u>had your license</u> yet?	8%	92%
If you told the sales person you were an experienced angler, did the sales person ask where you planned to fish?	39%	61%
If you told the sales person you were an experienced angler, did the sales person ask if you were looking for new equipment?	42%	58%



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TESTIMONIALS

- *“No one greeted us or acknowledged our presence...When we attempted to seek assistance, we were assured someone would come to help us. After waiting ten minutes, we never did encounter an associate to assist us.” (-)*
- *“Nick knew what he was talking about, and it showed. He not only addressed the reason I came into the store, but also provided me with additional items to make my day of fishing even better. Although I came in only asking for a fishing license, he suggested rod and reel set-ups and accessories...He did not dismiss me because I was a woman in a typically male department.” (+)*



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✓ Sporting Goods

SALES PROCESS EVALUATION

	Yes	No
Did the sales person listen attentively to your needs?	87%	13%
Did the sales person treat you with respect?	89%	11%
Did the sales person cross-promote the purchase of gear and equipment with a license purchase?	19%	81%
Did the sales person recommend any place for you to go fishing?	45%	55%



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CLOSE (Pt. 1)

	Yes	No
Did the sales person invite you to purchase an item to meet the need you discussed with him/her?	59%	41%
Did the sales person <u>invite you to purchase</u> a fishing license?	20%	80%
Did the sales person offer fishing regulations?	6%	94%



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CLOSE (Pt. 2)

	Yes	No
Did the sales person reveal that license dollars go towards conserving our natural resources?	1%	99%
Did the sales person request contact information (email address, mailing address)?	2%	98%
Did the sales person offer the opportunity to attend any upcoming fishing-related events/clinics that will take place or be sponsored by the retailer?	4%	96%



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TESTIMONIALS

- *"...All he said was it was on sale and walked away. We weren't comfortable in the fact that no one greeted us or tried to help us. Employees were talking to one another, would look right at us, and keep talking. As a woman not familiar at all with the equipment or accessories, I would not make a purchase for my son, son-in-law or grandsons who are all fisherman." (-)*
- *"This store would be my one stop shop regarding fishing. I got all the needed information with great customer service to back it up. The employees welcomed me and gave me that knowledge I was seeking. I left feeling confident, excited and open to fly fishing." (+)*

✓ Outdoor Specialty



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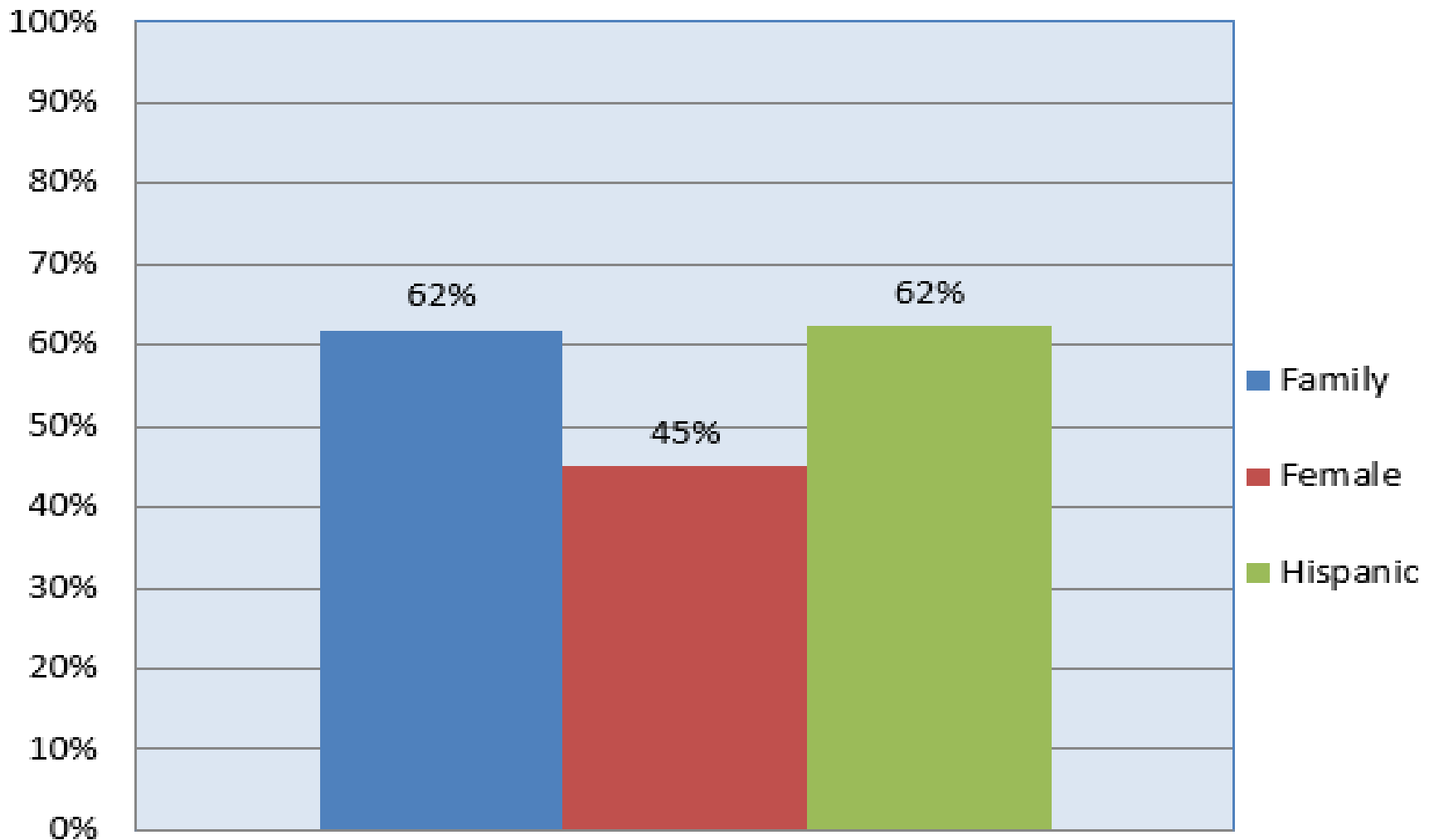


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COMPARISONS

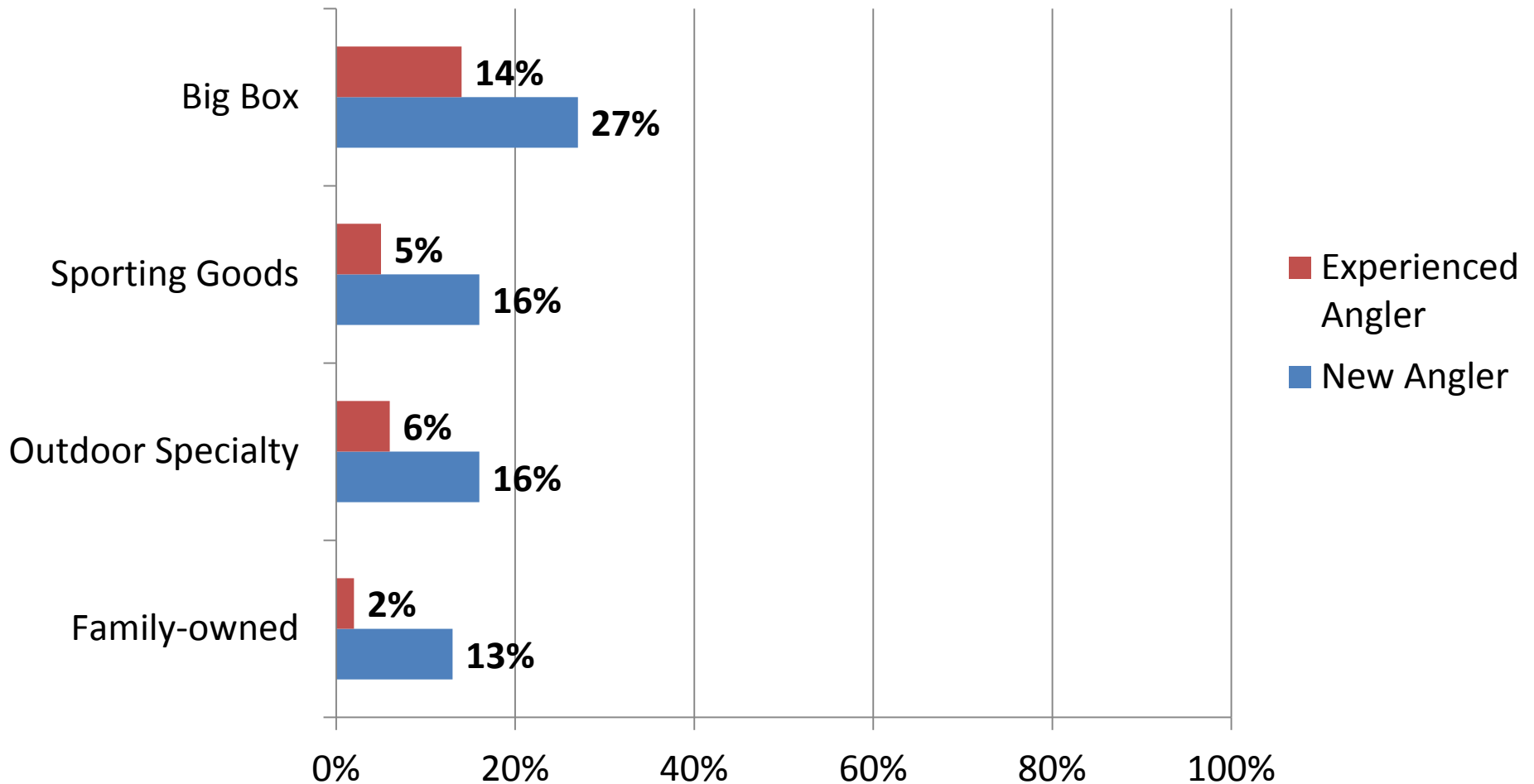


Scenario: I am interested in getting a fishing license



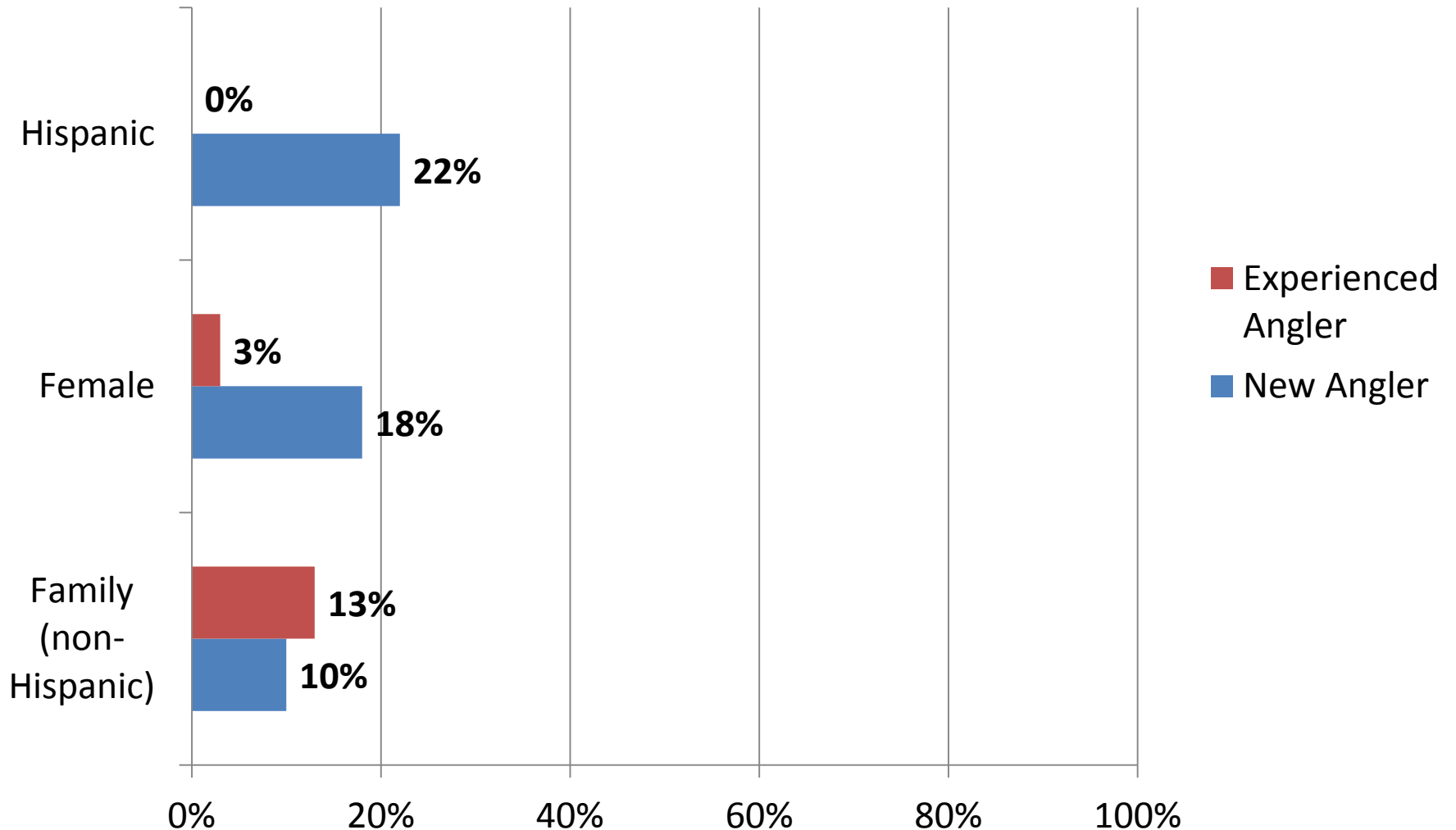
KEY INQUIRIES

Did the salesperson ask if you had a license yet?



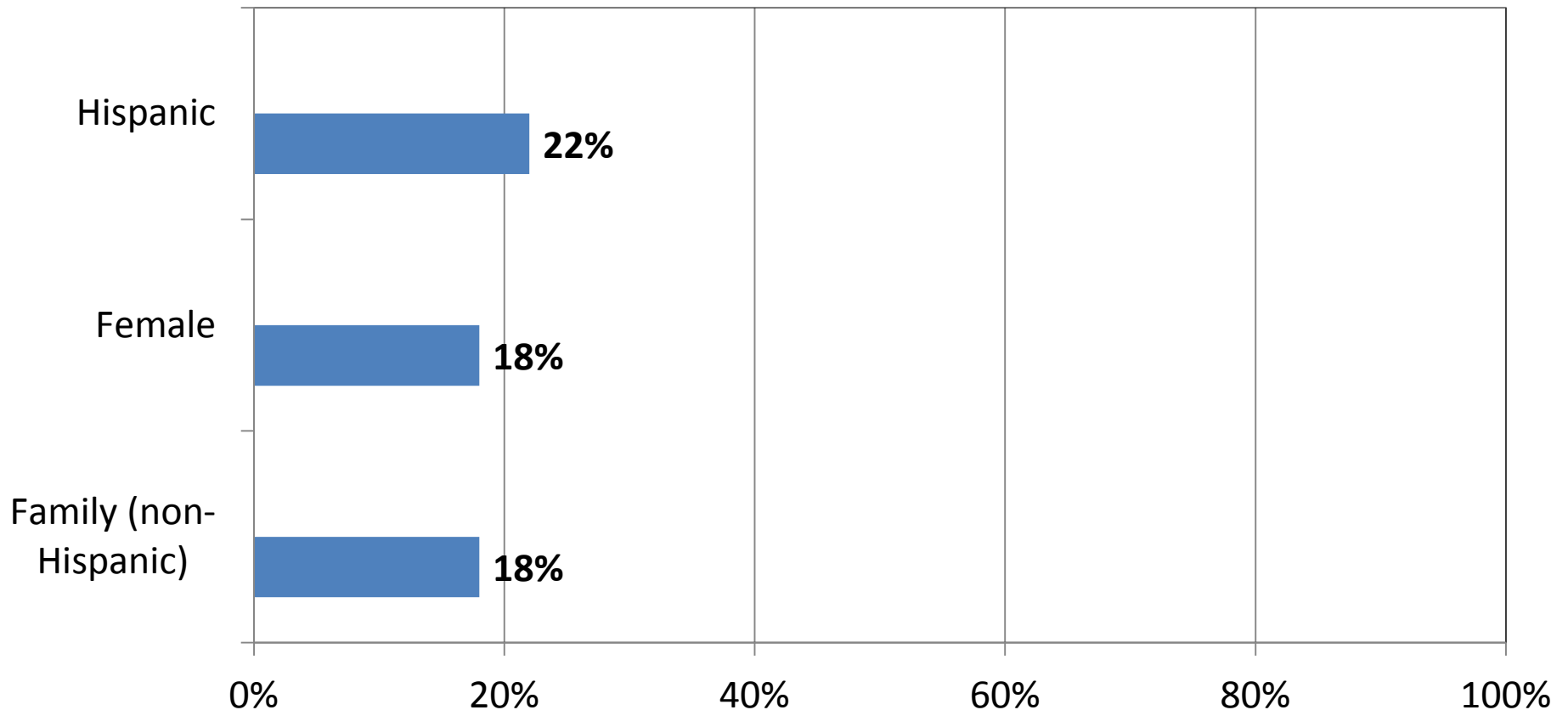
KEY INQUIRIES (Fishing)

Did the salesperson ask if you had a license yet?



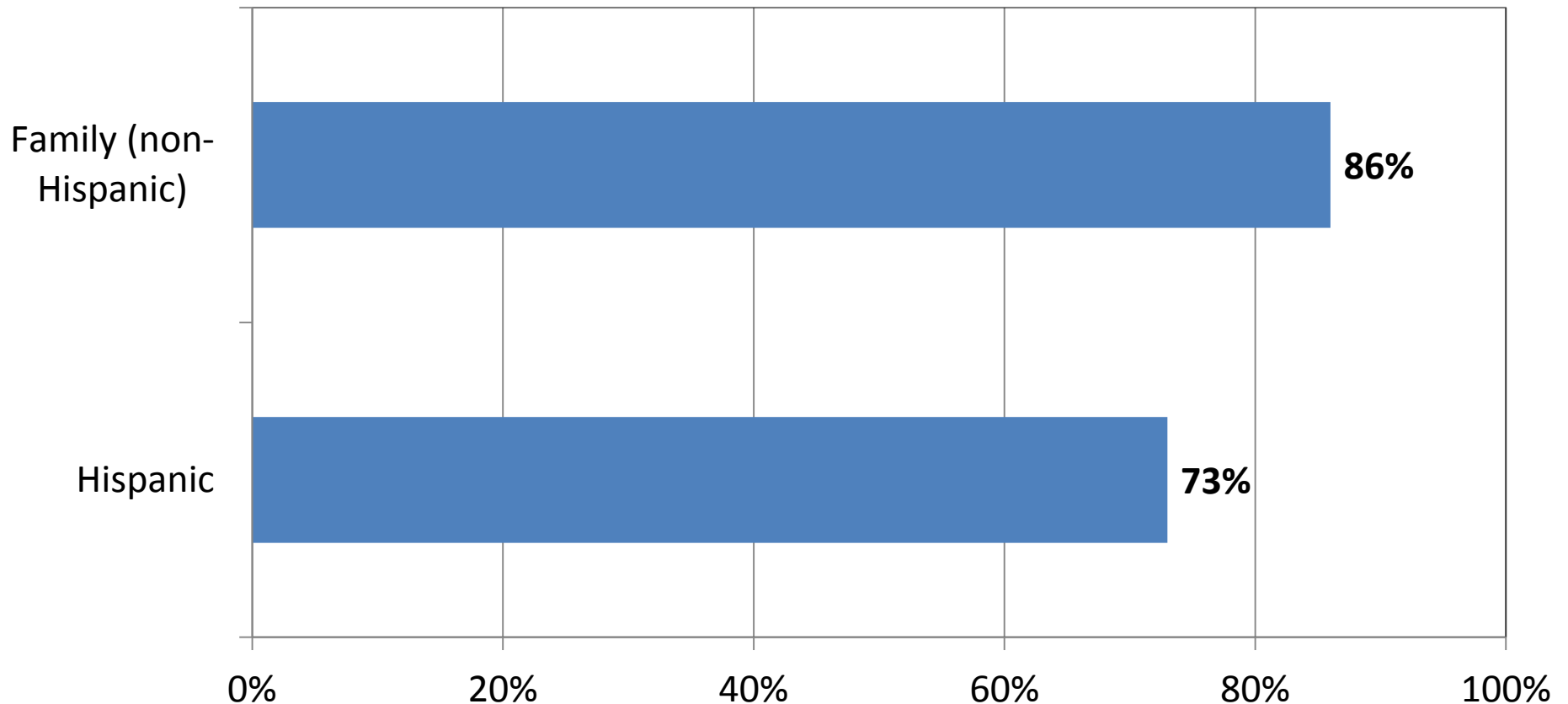
KEY INQUIRIES (Fishing)

Did the salesperson cross-promote the purchase of gear/equipment with a license purchase?



KEY INQUIRIES (Boating)

Did you feel welcomed, valued and informed as a customer in this store?



KEY INQUIRIES (Boating)

- Non-Hispanic shoppers (62%) were told about boating safety features more often than their Hispanic counterparts (51%)
- Non-Hispanic shoppers were provided education about various types of boats (90%) more often than their Hispanic counterparts (78%)

TESTIMONIALS

- *"...I stood by the rods/reels, looked at them for several minutes, and even picked them up and handled them but got not reaction from the sales associate. He did not even ask us questions...Even though we told him we needed assistance with choosing some fishing equipment, he simply showed us where the equipment was and left us to browse on our own." (-)*
- *"The sales person was knowledgeable and showed me a fishing rod that matched my needs. He even offered a 5% discount for my first purchase. I felt that the service I received was personalized and that I was valued as a potential customer. The employee treated me with respect and recommended products that were adequate for my needs." (+)*



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✓ Family-Owned

WHO IS OUR COMPETITION?



COMPARISON

- How do we compare?
 - ✓ General Retail Industry: 77.9%
 - ✓ Department and Discount Stores: 77%
 - ✓ Retail Specialty Stores: 80%
- Retail Leaders/2014 Hall of Fame
 - ✓ Amazon, Hilton, Marriott, Chik-fil-A, American Express, Trader Joe's, UPS, Sony, Hewlett Packard and Apple

Source: USATODAY.com



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OPPORTUNITIES FOR AGENCIES

- Education of store/sales associates (customer service, sales skills)
- Build and maintain strong relationships with vendors
- Maintain e-relationships w/customers throughout year

OPPORTUNITIES FOR AGENCIES

- License vendor training
 - ✓ POS signage/card containing Top Three things for customers (bilingual)
 - ✓ Cheat sheet for store associates
 - ✓ Time to allow customers to hold, practice
 - ✓ Incentives for top vendors

REPORT AVAILABLE

- Full report available
 - ✓ <http://takemefishing.org/general/about-rbff/research-and-evaluations/>



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Thank you