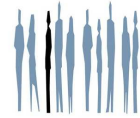




***The Quality of
Greeting and Service
in the Most
Prestigious Avenues
in the World***

April 2005



ad hoc

Investigación de mercados

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Introduction



The greatest avenues in the world have:

▶ **AN INTERNATIONAL REPUTATION**

*Every year, millions of visitors stroll along them.
Some "fans" like to go there regularly.
These avenues like to be talked about.*



▶ **LUXURY TASTES**

Luxury brands and chains may be found in them.



(BUT)

Do these grand "ladies" know how to receive their admirers and manage their celebrity?

The Excellence Mystery Shopping International working program decided to check this, and therefore audited 17 major avenues in the World.

THE AVENUES AUDITED

ADDRESS	TOWN	COUNTRY
PC HOOFSTRAAT	AMSTERDAM	HOLLAND
WANGFUJING AVENUE	BEIJING	CHINA
DOWN TOWN	BEIRUT	LEBANON
AVENUE LOUISE	BRUSSELS	BELGIUM
VIA MONTENAPOLEONE	MILAN	ITALY
PARIZSKA	PRAGUE	CZECH REPUBLIC
DEIRA CITY CENTER	DUBAI	DUBAI
GINZA CHUONKU	TOKYO	JAPAN
JUNGFERNSTIEG AND AROUND	HAMBURG	GERMANY
BAGDAD AVENUE	ISTANBUL	TURKEY
AVENIDA DA LIBERDADE	LISBON	PORTUGAL
OXFORD STREET AND NEW BOND STREET	LONDON	ENGLAND
CALLE SERRANO	MADRID	SPAIN
14TH ST & 5TH AVENUE	NEW YORK	USA
AVENUE DES CHAMPS ELYSEES	PARIS	FRANCE
OSCAR FREIRE, BELA CINTRA, FARIA LIMA	SAO PAULO	BRAZIL
PARAGON	SINGAPORE	SINGAPORE

THE OPERATING PRINCIPLE

At the end of 2004, professional surveyors from EXCELLENCE MYSTERY SHOPPING (an International Structure created by PRESENCE) visited **630 boutiques** simultaneously on the most attractive avenues of 17 World capitals.

To begin with, they measured the attractiveness and appearance of the avenues.

Next, they visited between 35 and 45 boutiques **per avenue** in the same sectors (post offices, tobacconists, perfume shops, airlines, travel agencies, ready to wear, restaurants, jewellers, souvenir shops, etc.).

The role of each mystery customer / surveyor was to pretend to be a genuine customer with a suitable scenario, and to fill in an objective table prepared in advance that covered mainly:

- *cleanliness,*
- *the reception,*
- *the staff,*
- *the way of looking after the customer,*
- *payment,*
- *the toilets.*

Part 1

Attractiveness, Appearance & Reception of the Avenues

ATTRACTIVENESS & CLEANLINESS

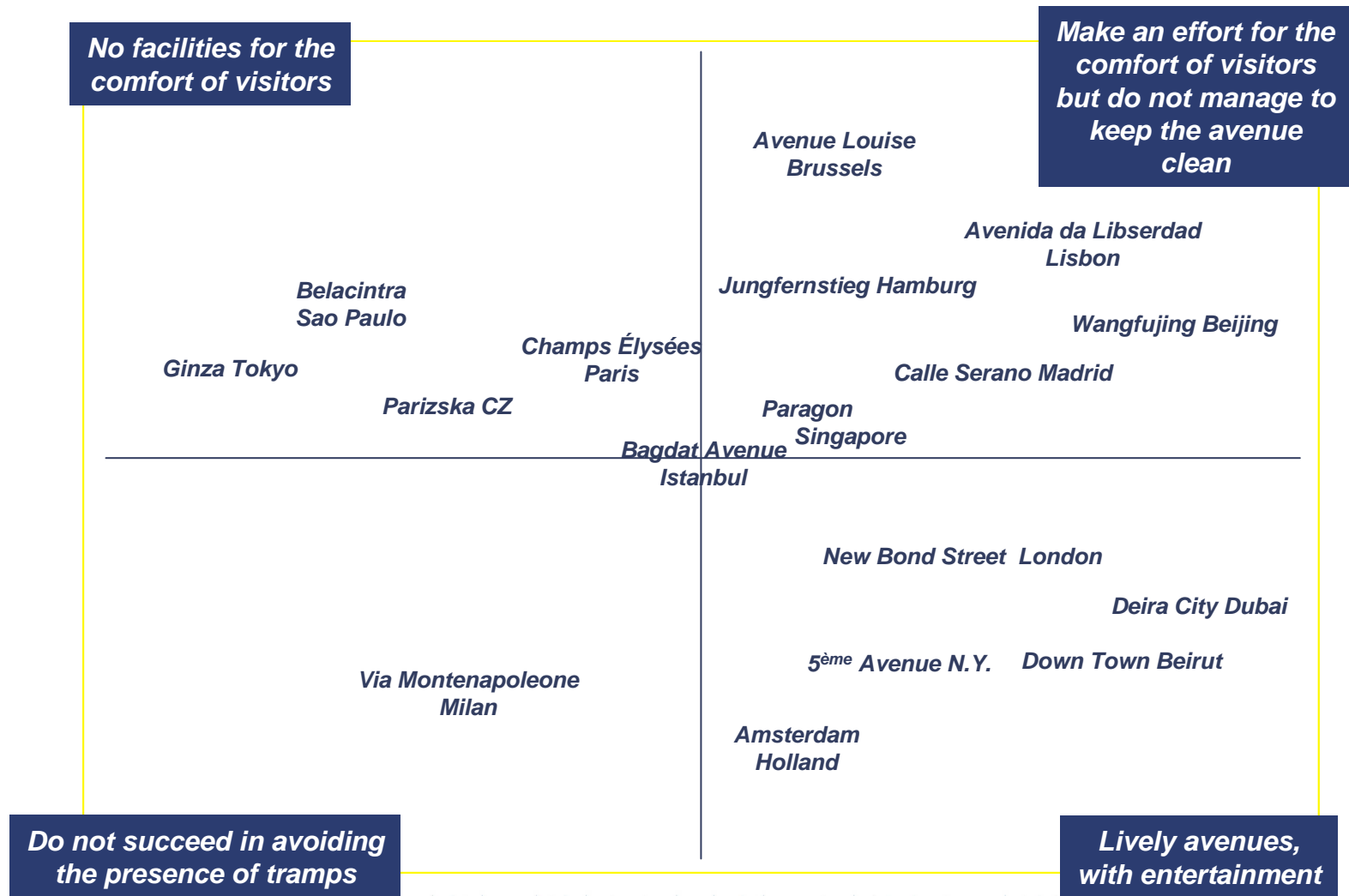
The great avenues do not always pay attention to their image (cleanliness, facilities, etc.).

- ▶ Globally, the great avenues audited obtained a success rate of **58%** for the elements of attractiveness and cleanliness noted.

In most cases they forget about the well-being of their visitors:

- *Few or no benches to rest on,*
- *No entertainment,*
- *No flowers (to make the environment attractive)*

The avenues do not all have the same profile in terms of attractiveness:



Most of the great avenues do not provide a map of the neighbourhood for their visitors, who are therefore often obliged to ask for information.

 **What happens?**

Scenario 1

The visitor stops a policeman and asks him the way to either a post office or a cash dispenser.

	Success rate
- The policeman is friendly and smiling	35 %
- He tries his best to inform the visitor	76 %
- He takes his leave in a friendly fashion	41 %

=> In the majority of cases, the visitor is informed, but the contact is not always friendly.

Scenario 2

The visitor stops a passer-by and repeats his request (search for a post office or a cash dispenser).

	Success rate
- The passer-by is friendly and smiling	47 %
- He tries his best to inform the visitor	55 %
- He takes his leave in a friendly fashion	45 %

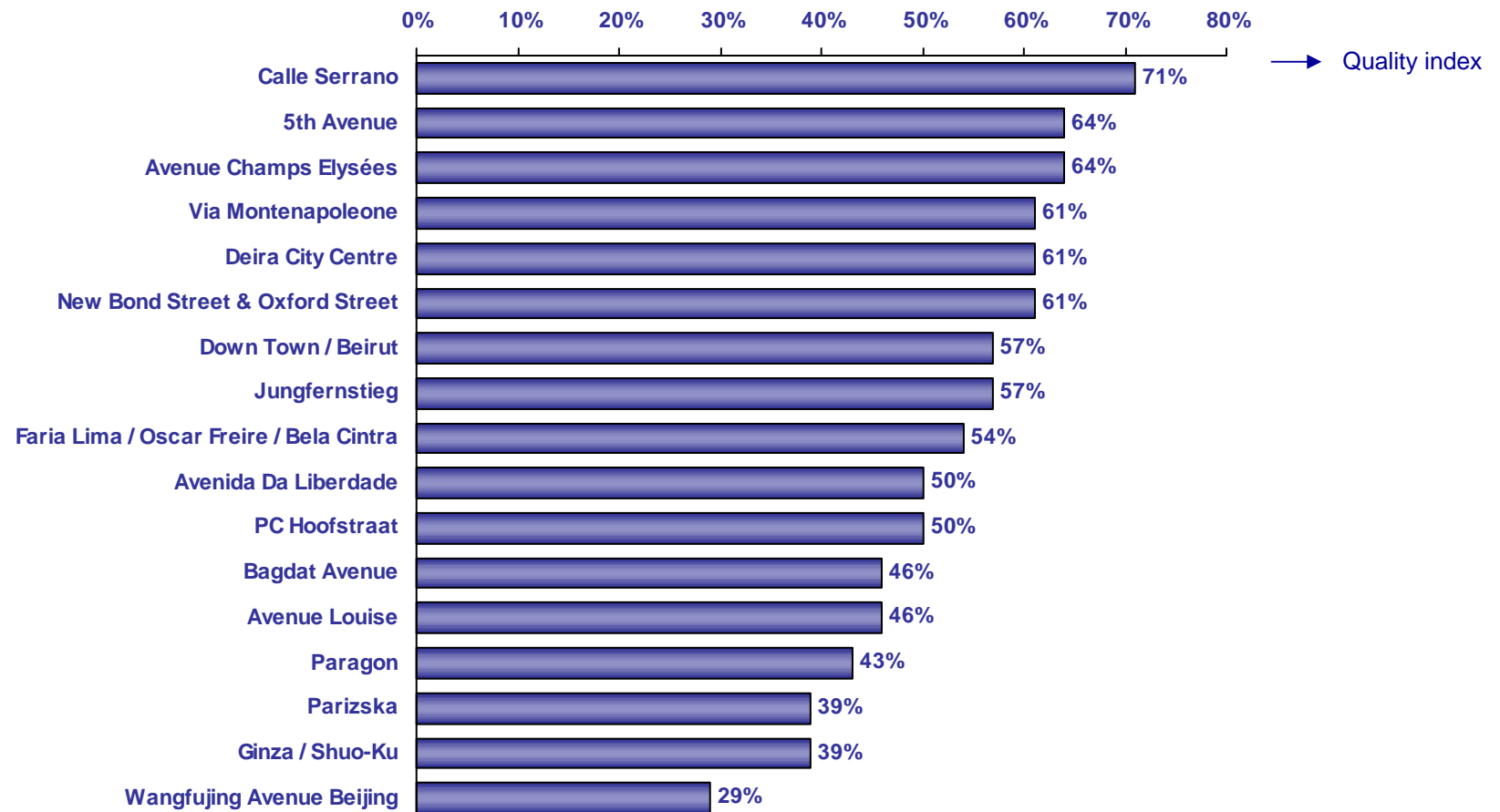
=> *Furthermore, if the same visitor is in a wheelchair, only half of these great avenues have laid out the road in such a way as to facilitate his movements.*



TO CONCLUDE ...

In terms of attractiveness, cleanliness and friendliness, the great avenues obtain marks that are fairly average.

However, they are not all at the same level:



Part 2

Quality of Reception & Service at the Point of Sale

ATTRACTIVENESS OF THE POINTS OF SALE

- ▶ The great majority of the points of sale have understood that customers are attracted above all by their allure and their appearance.

=> The surroundings and the shop window are clean, as are the products displayed in the shop window

In addition, the customers' assessment of the exteriors is good on the whole, with a positive score of 70 %, but none of the avenues achieved excellence. Wangfujing in Beijing obtained 22 %, compared with 97 % for the Jungfernstieg in Hamburg.

- ▶ The interiors of the points of sale were just as attractive, with most of the shops providing customers with premises that were tidy and clean.
- ▶ We should also note that the organisation of the points of sale allowed customers to circulate easily.

RECEPTION AND LOOKING AFTER THE CUSTOMER

- ▶ The first step has been made: the customer has entered the point of sale.

The staff now has the mission of welcoming him or her and putting him or her at ease.

Do the customers really feel welcome in the shop?

⇒ ***Their perception was very mediocre in the end:***

only 53 % had a positive impression.

⇒ ***As proof we noted that 30 % of the customers were not greeted when they entered the shop.***

RECEPTION AND LOOKING AFTER THE CUSTOMER

Scenario

A customer asks a salesperson for some information.

	Success rate
If the salesperson has to make the customer wait before replying, she excuses herself for making the customer wait	19 %
The salesperson says good day	76 %
She is very smiling and friendly	64 %
She takes her leave (by a word or a phrase)	65 %

=> *The "basics" for maintaining the sale are often neglected.*

Tokyo was in the lead for this theme, followed by Brussels. The Champs Elysées was below average, and Beijing and Dubai were at the bottom.

RECEPTION AND LOOKING AFTER THE CUSTOMER

The Champs Elysées was in the lead for the welcome given to the customer at the first contact (“Good day” in 97% of cases). But it was rare for the other employees to make a welcoming gesture (28% of the visits only).

A smile is the norm for the Japanese (86% of cases).

At Via Montenapoleone in Milan, as well as in Singapore, the staff in the shop can be identified easily.

Shops in Beirut have the good sense to distribute the staff around the boutique, unlike Sao Paulo (Brazil).

There were no signs of annoyance in England, France, Italy, Japan or Holland, but 1 in 2 in Beijing and 4 in 10 in Dubai.

RECEPTION AND LOOKING AFTER THE CUSTOMER

On the Champs Elysées a salesperson was smoking in 11% of cases, and France is badly placed for this item, since we did find a single smoker in 9 of the avenues.

In almost all cases the staff was well dressed and clean in France and Belgium, but on the contrary China and Turkey could improve the dress of their salespeople.

We note that the staff of 5th Avenue are above average in this respect.

Saying good-bye or taking leave is not systematic. London and New York were best on this theme (Anglo-Saxon culture, doubtless ...).

THE TOILETS

Hygiene and the state of the toilets need to make a great leap forward in the future, since:

out of 166 toilets audited in the 17 avenues:

- 20 were dirty,
- 10 had no paper,
- 3 did not lock,
- 16 had no soap

and,

- 33 had no towels or hand dryers.

- ▶ The majority of the points of sale do not pay as much attention to payment by customers as they should:

Paying at the cash desk, which is synonymous with the end of a meeting, lacks friendliness:

=> Too little welcome (« Good day") at the cash desk,

=> The customer is not thanked for his visit,

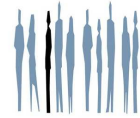
=> And above all, nobody expresses the wish to see the customer again in the future (Goodbye / See you soon).

NB: The Japanese in Tokyo were perfect in this respect.

- ▶ In the 630 shops audited, only 126 told the customer they would like to see him or her again, or the equivalent.

As a result, the customer has a opinion that is fairly “mediocre” on the reception and service at the points of sale:

36 % of the impressions were very positive.



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The End

