

NC ABC Commission Market Research Project

Bar and Restaurant Customer Survey Results

December 2011

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Contents

Executive summary

Survey method and respondent profile

Overall results

Analysis by bar and restaurant location – urban, suburban, small town, rural

Analysis by NC regions – Western, Piedmont, Eastern

Other recommendations to improve customer service

Executive summary

Executive Summary

Project objectives:

- **Assess current local ABC store customer service levels for key market segments**
- **Develop benchmarks to monitor customer service trends**
- **Identify specific ways that local ABC stores can improve customer service**

Research method:

- **Random sample of all NC ABC Commission licensed bars and restaurants**
- **400 completed telephone interviews with the person who “manages your bar and restaurant liquor purchases from your local ABC store”**
 - **Graded local ABC store performance on customer service dimensions**
 - **Solicited suggestions for improving customer service**
 - **Tested several possible measures to enhance customer service**
- **Telephone interviews conducted in November and December 2011**
- **Survey design, conduct, and analysis according to professional market research standards**

Major findings and recommendations

Respondents graded the ABC store where they shop for their bar or restaurant an average of A- as an overall summary grade

Particularly high grades went to:

- Staff courtesy, professionalism, product knowledge
- Cleanliness of the store's interior
- Getting the order correct
- Shopping convenience and checkout

Less high grades went to:

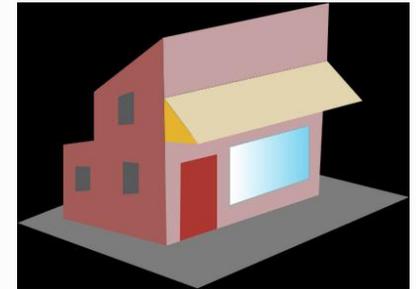
- Price and value for the money
- Local ABC store exterior appearance and signage
- Governance and oversight by the local ABC board
- Local ABC store's community citizenship in promoting public health and public safety



These were unknown to many respondents...

How can local ABC stores improve customer service to this important market segment?

- Upgrade the store's exterior appearance and signage
- Clarify the local ABC board's role and conduct in governance and oversight
- Exhibit good community citizenship by seriously promoting public health and public safety
- Leverage existing technology like email and the Internet for placing orders
- Accept all reasonable forms of payment, including credit and debit cards, cash, and certified and business checks
- Extend hours of operation
- Open for shopping on Sunday afternoons
- Offer delivery service for a small additional fee



Mon	Tue	Wed	Thr	Fri	Sat	Sun
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		



Survey method and respondent profile

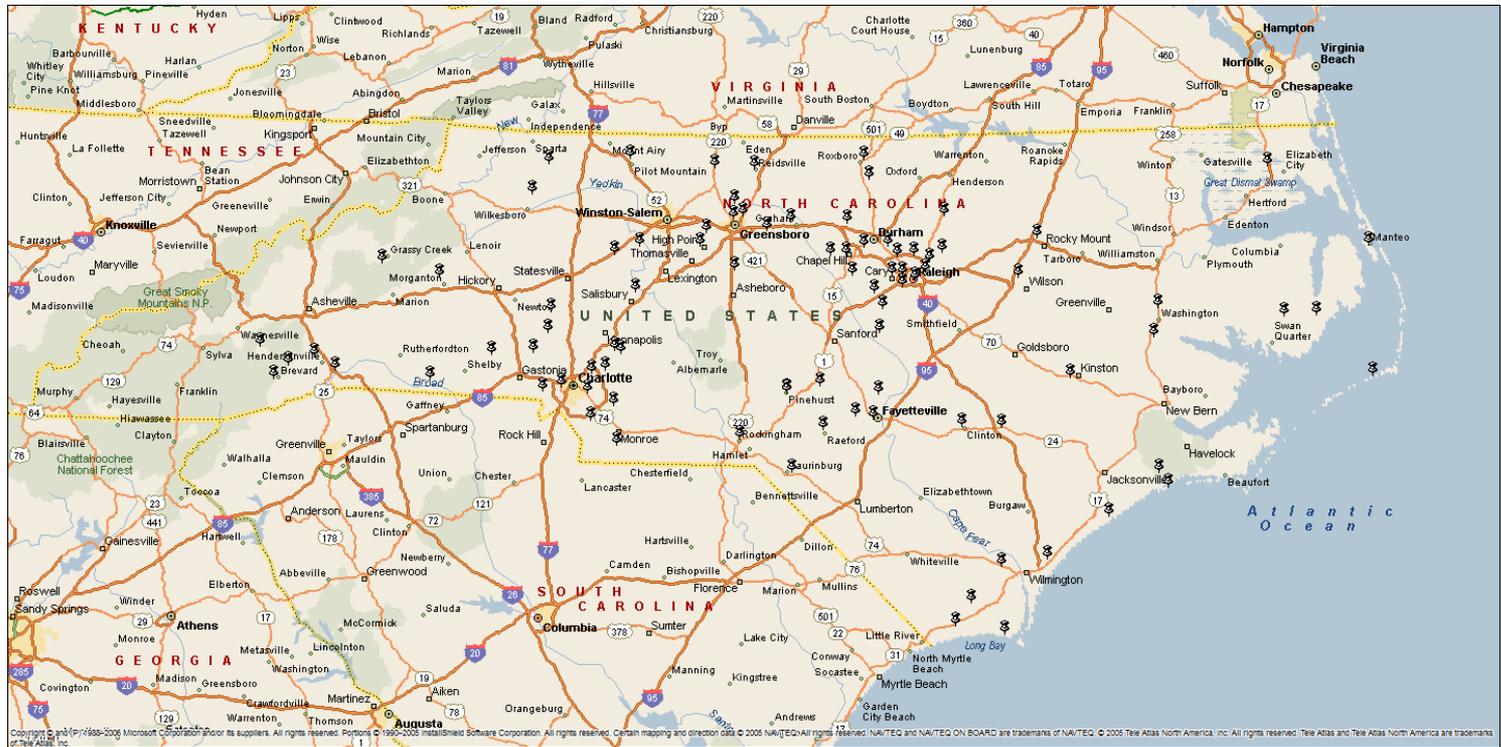
The 400 survey respondents are representative of those who manage bar and restaurant liquor purchases from local ABC stores across North Carolina

Random sample drawn from all NC ABC Commission licensed bars and restaurants.

400 telephone interviews with the person who “manages your bar and restaurant liquor purchases from your local ABC store”

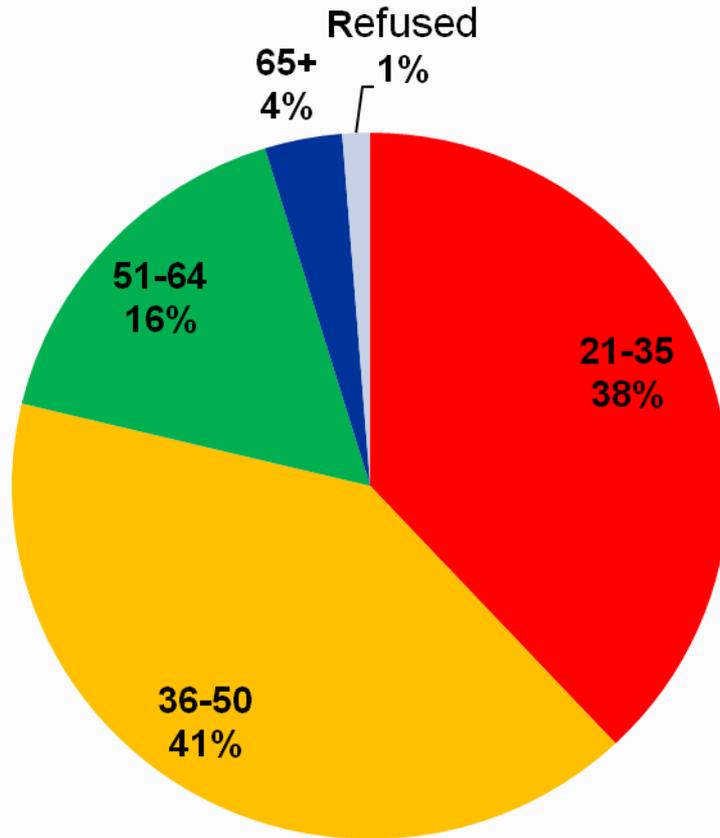
Interviews conducted in November and December 2011

ZIP code locations of bar and/or restaurant respondents

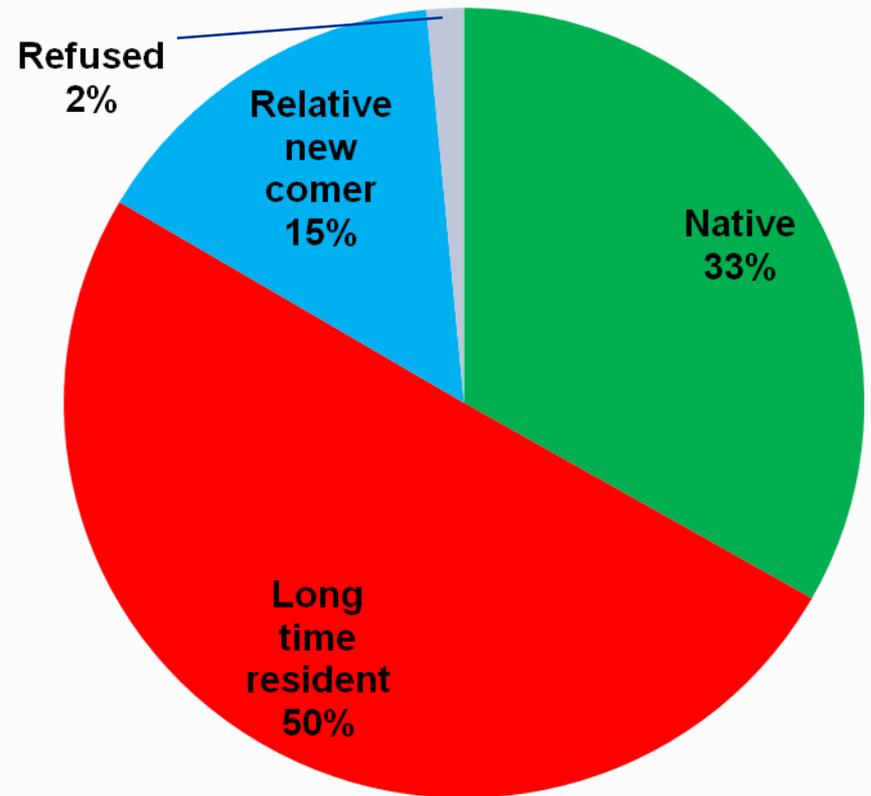


The median respondent was 36-50 years old and a long time resident of North Carolina.

What is your age?

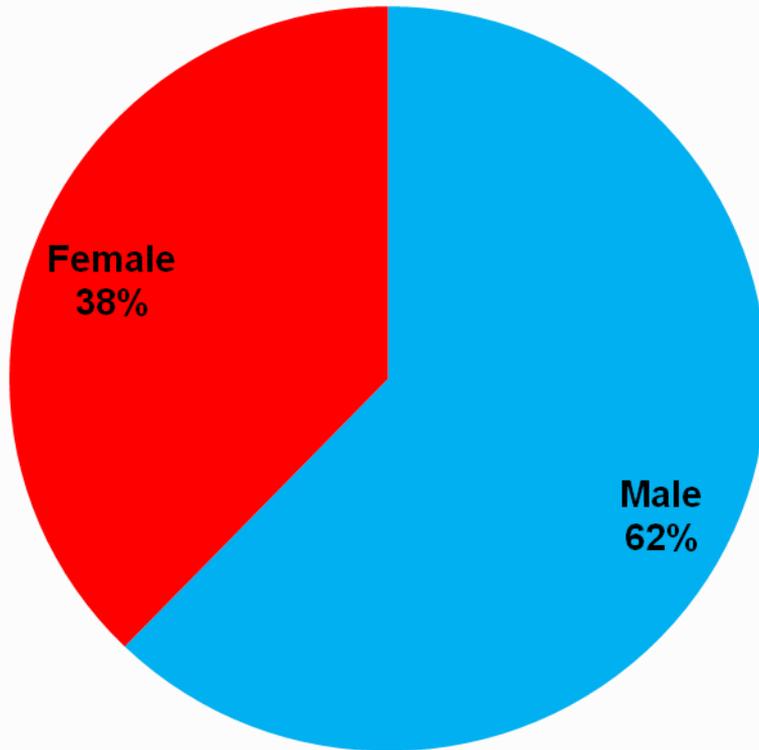


Do you consider yourself a native of NC, a long time resident, or a relative newcomer to the state?

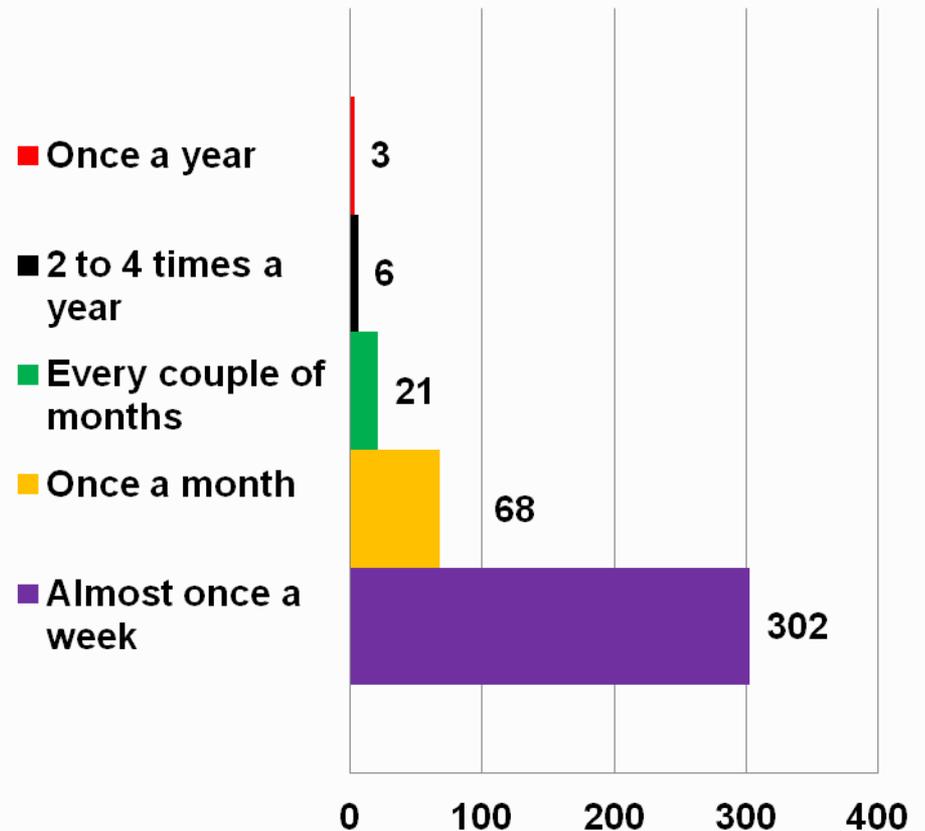


The median respondent was male and shops at a NC ABC liquor store almost weekly for his/her bar or restaurant.

Are you male or female?

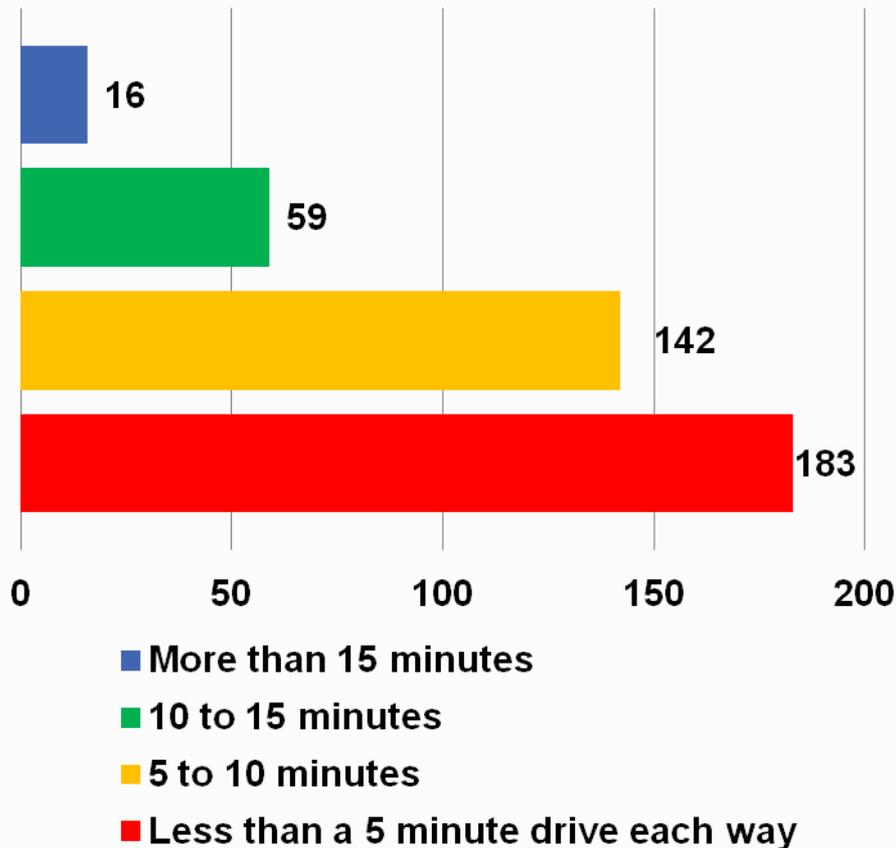


How often do you shop at a North Carolina ABC liquor store for your bar or restaurant?

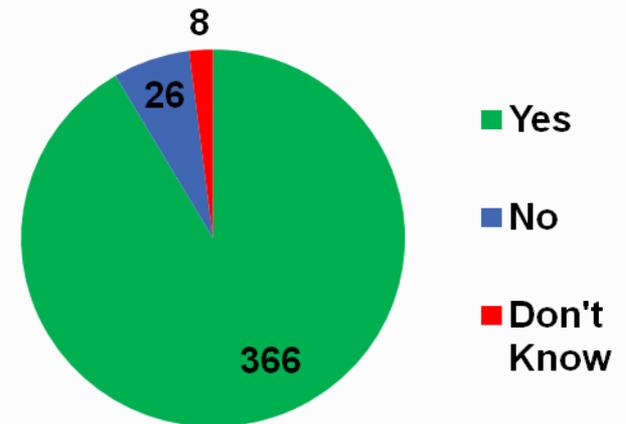


For the median respondent, the closest liquor store is a 5 to 10 minute drive each way, and this is the same liquor store where 93% of respondents are assigned to shop.

How far away is the liquor store closest to your bar or restaurant?



Is this the same liquor store where you are assigned to shop for your bar or restaurant?



Overall results

Respondents gave their ABC store high grades for staff courtesy, professionalism, and product knowledge, plus cleanliness of the store's interior and safety in the parking lot.

What grade would you give the NC ABC liquor store where you shop for your bar or restaurant for ... ?



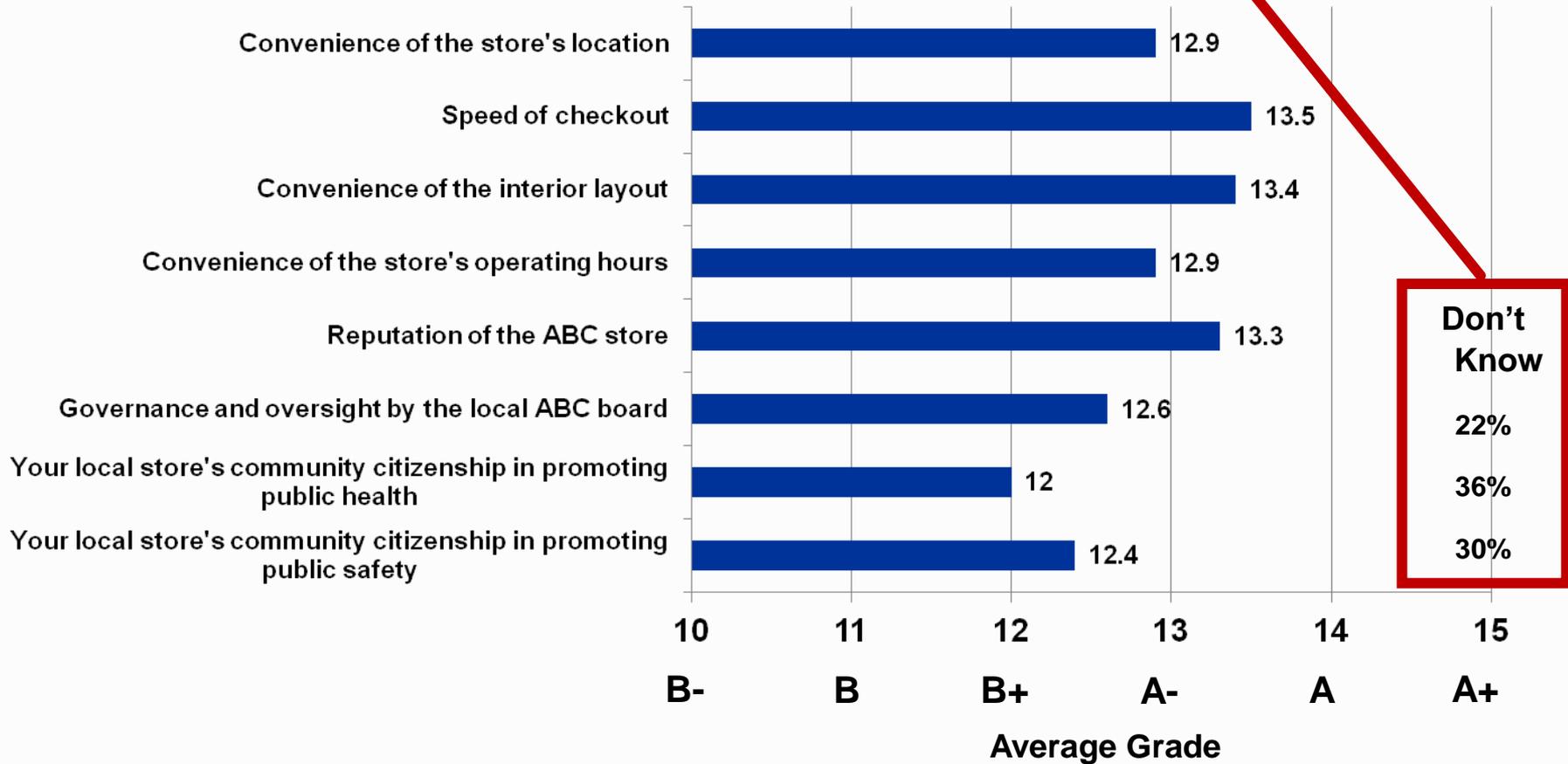
Getting the order correct got a high grade, but price, value and the exterior of the ABC store were graded lower.

What grade would you give the NC ABC liquor store where you shop for your bar or restaurant for ... ?



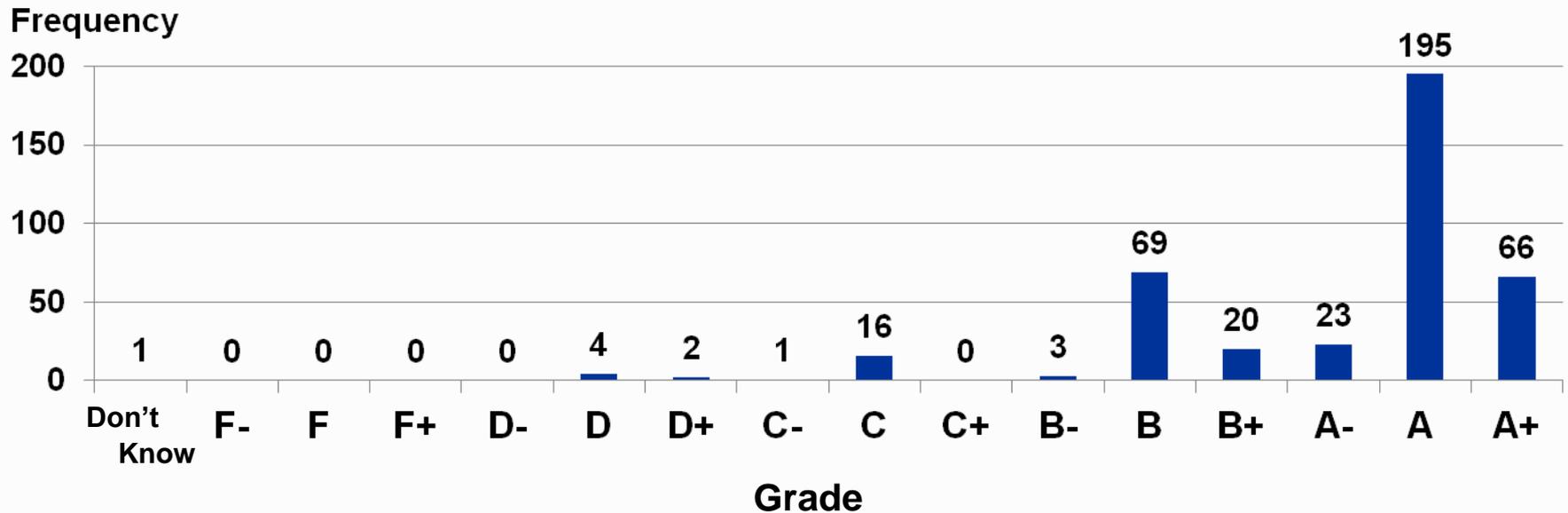
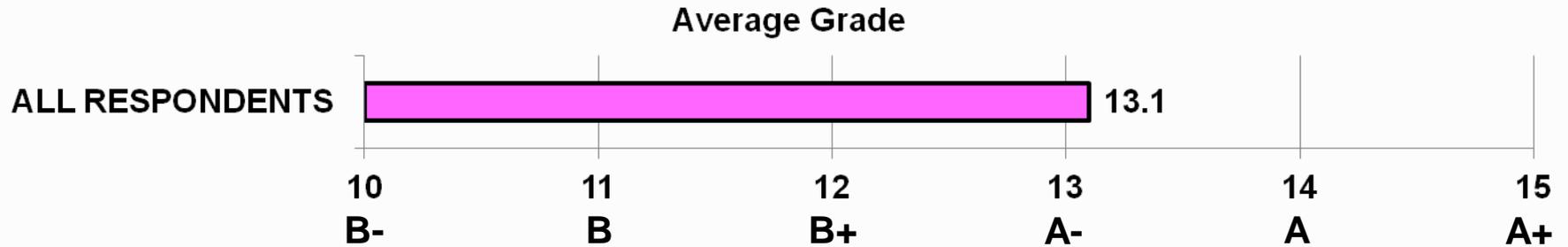
Shopping convenience was graded very positive, yet the local ABC board and store's community citizenship grades were less positive and unknown to many respondents.

Using the same grading scale as before, how would you rate ... ?



Respondents graded the ABC store where they shop for their bar or restaurant an average of “A-” overall.

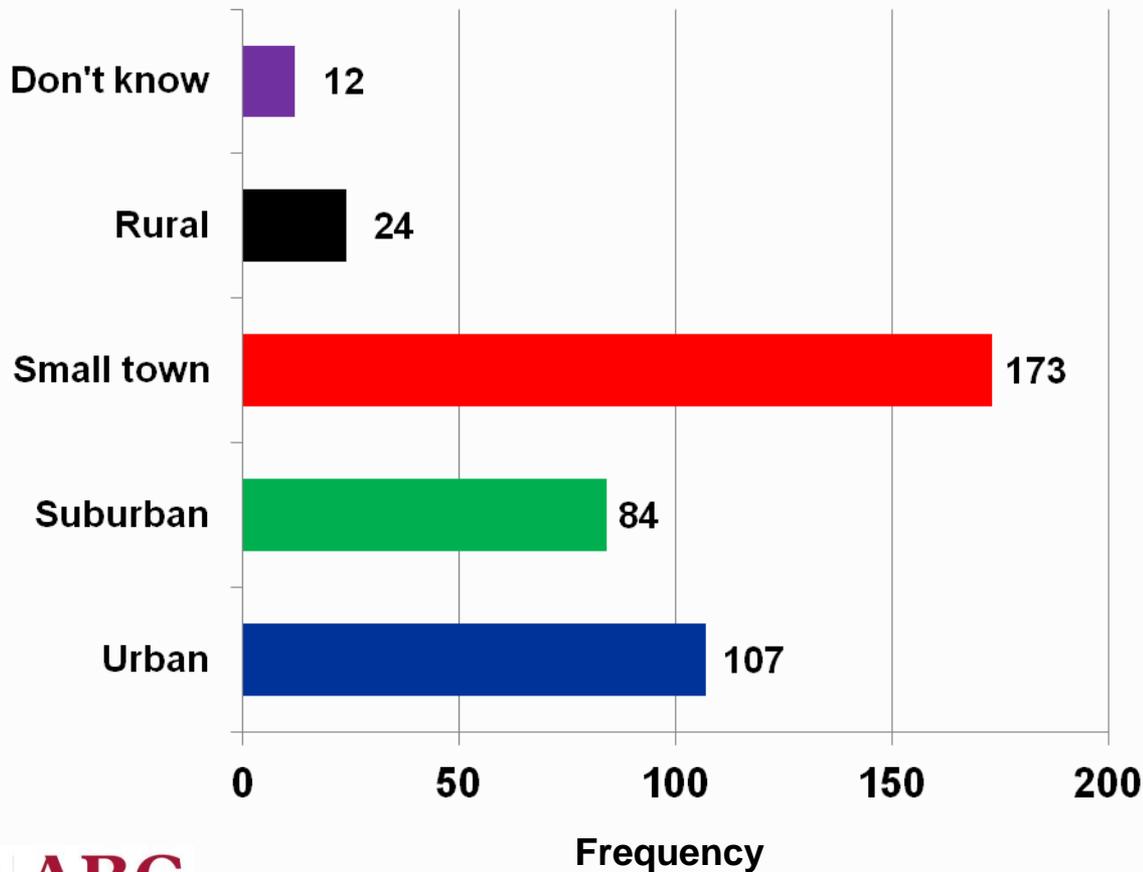
“What overall summary grade would you give the NC ABC liquor store where you shop for your bar or restaurant?”



Analysis by bar and restaurant location – urban, suburban, small town, rural

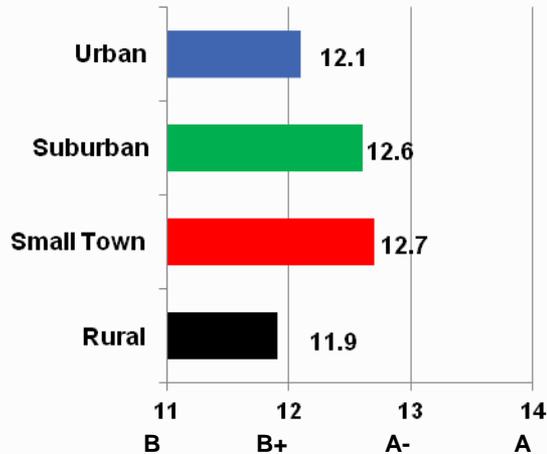
Respondent self-identified information enables exploratory analysis by urban vs. suburban vs. small town vs. rural bar and restaurant location.

“How would you describe the general area where your bar or restaurant is located?”

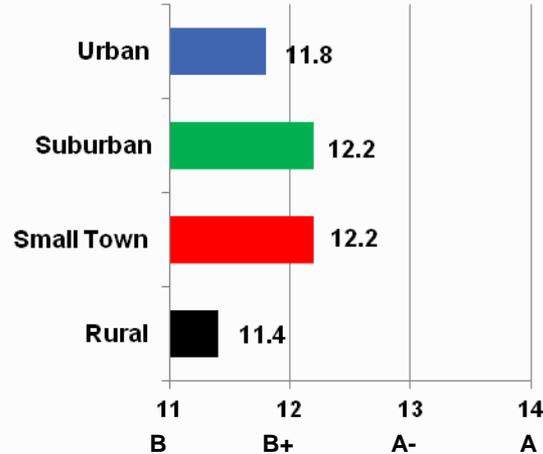


Bar managers in rural locations generally graded their ABC stores lower on exterior and outside factors than did bar managers in other locations.

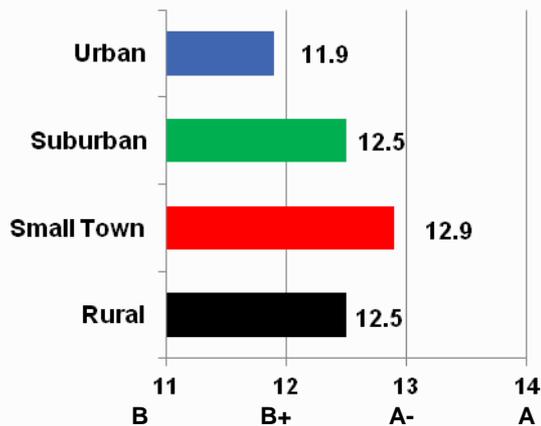
Exterior of the store is welcoming



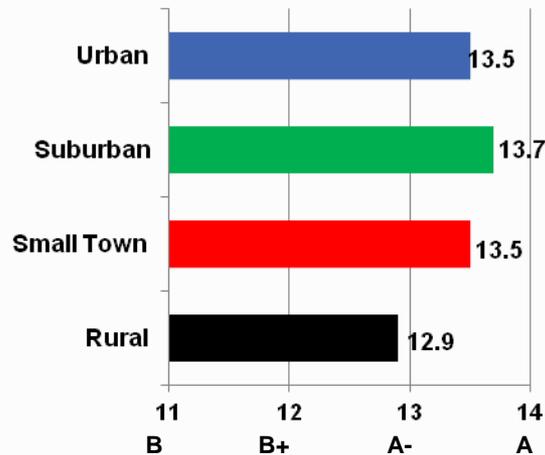
Outside attractiveness of the store



Visibility of outside signs identifying store

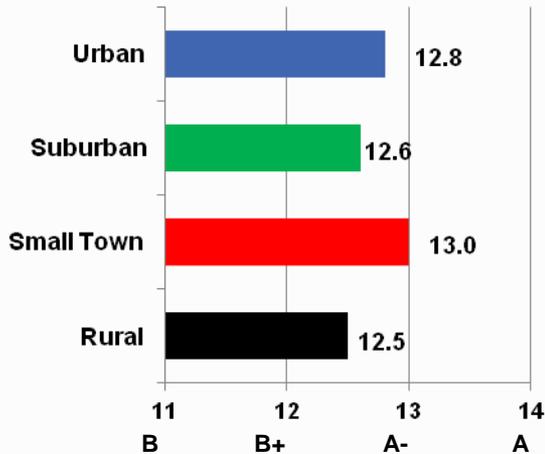


Safety in the store's parking lot

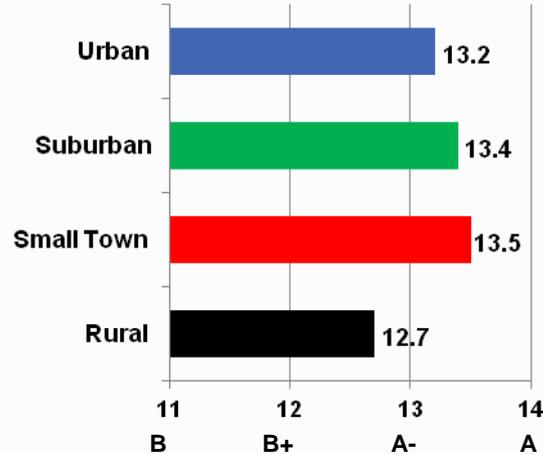


Bar managers in small town locations gave high grades to their ABC stores for location and interior factors.

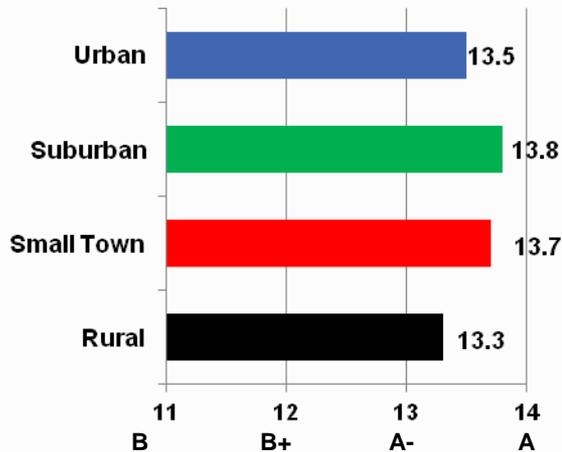
Convenience of store's location



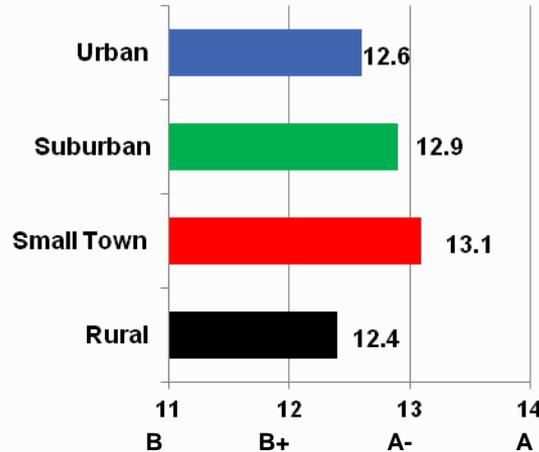
Convenience of interior layout



Cleanliness of the store's interior

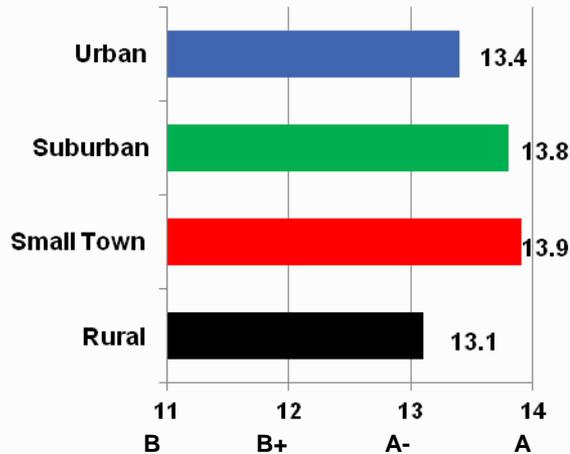


Interior of store encourages shopping

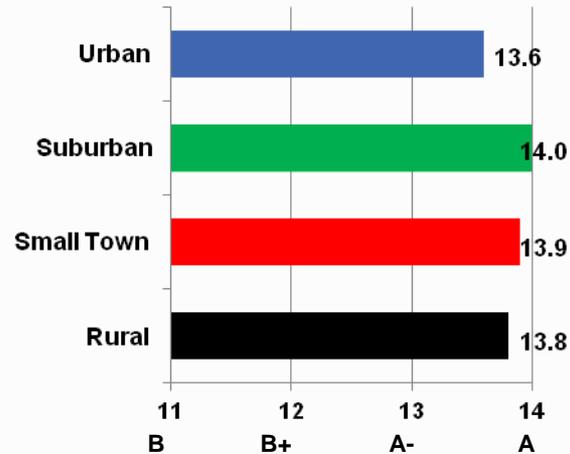


Bar managers in suburban and small town locations gave high grades to their ABC stores for staff and help in getting special orders.

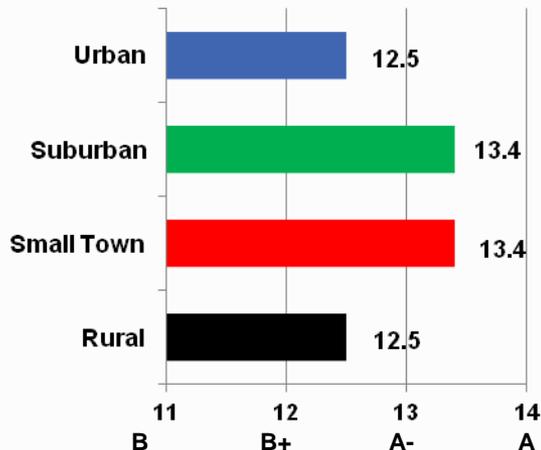
Professionalism of the staff



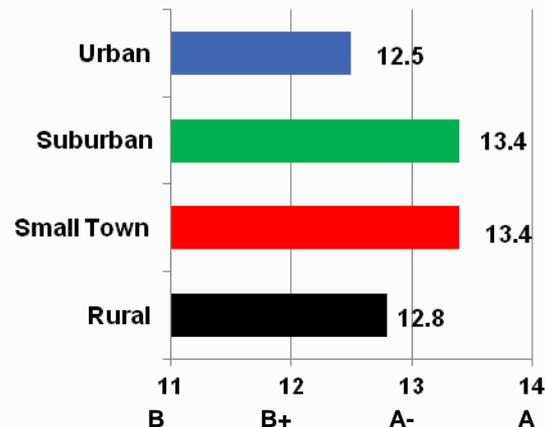
Courtesy of the staff



Helpfulness in getting special orders

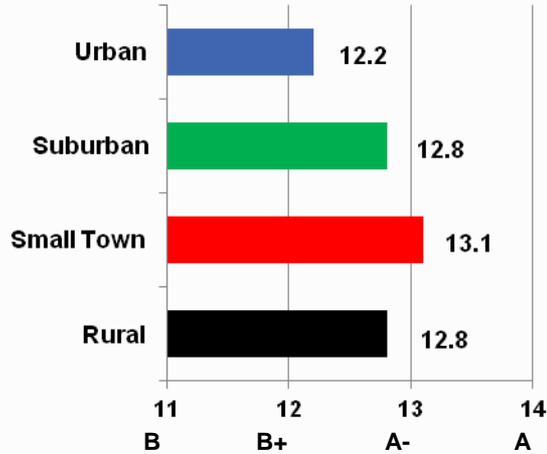


Number of staff members available to help customers

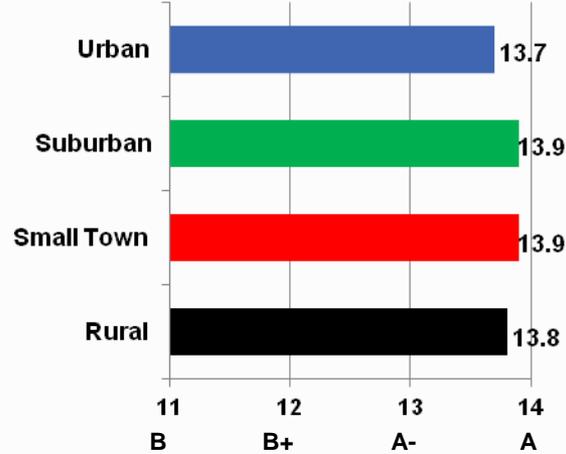


Bar managers in all locations graded their ABC stores high for getting the order correct, yet urban stores scored lower in special ordering and rural stores lower in speed of checkout and convenience of store's operating hours.

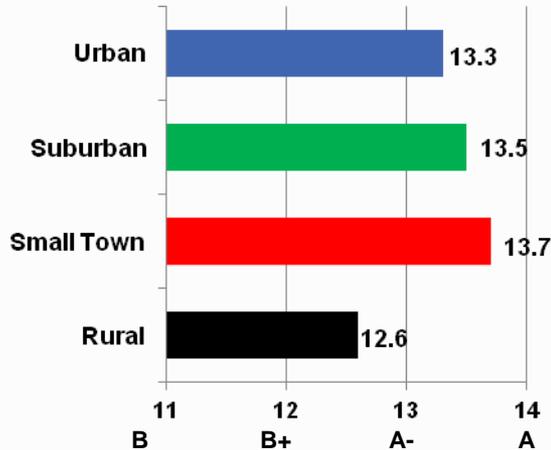
Special ordering liquors or brands



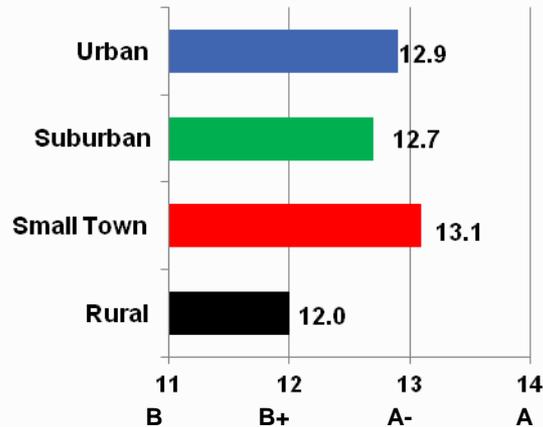
Getting your order correct



Speed of checkout

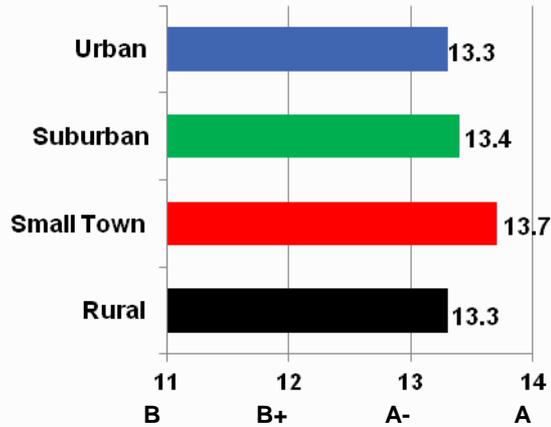


Convenience of store's operating hours

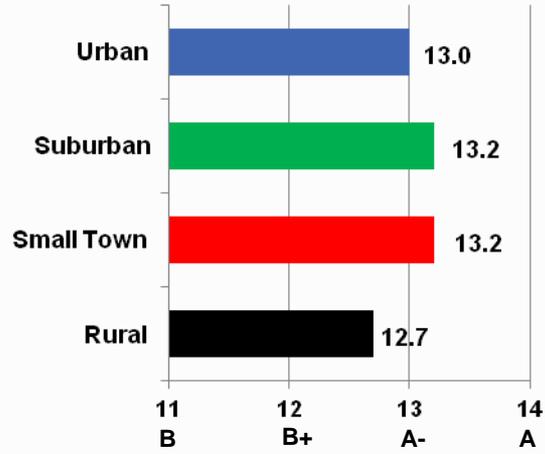


Bar managers in suburban and small town locations graded their ABC stores higher in product factors and in value for the money than did those in urban and rural.

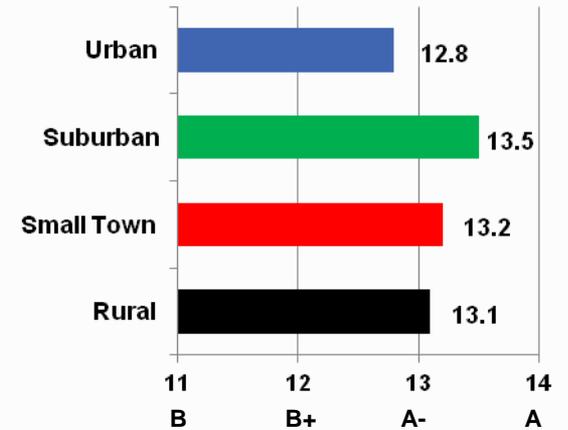
Staff's knowledge about products offered



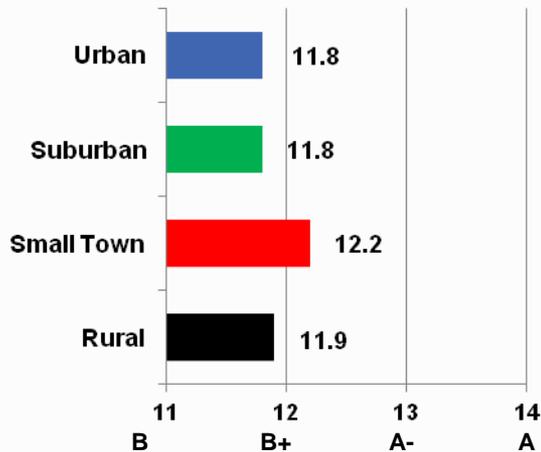
Selection of liquor offered



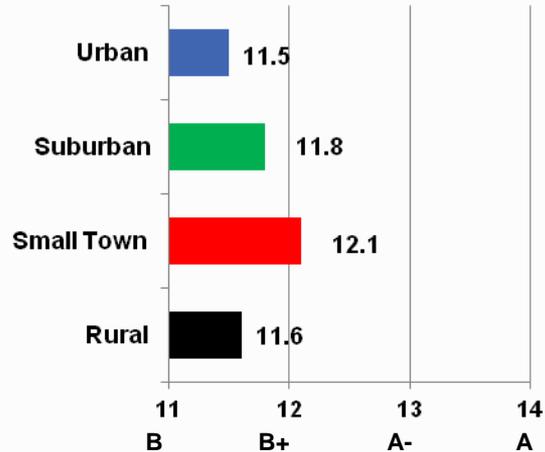
Adequate supply of the product you shop for



Store's prices are reasonable

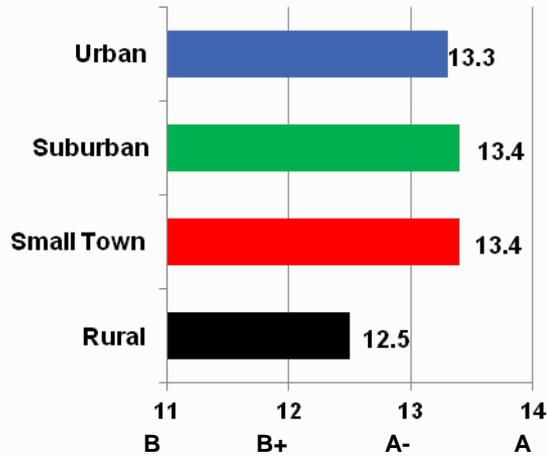


Value for the money

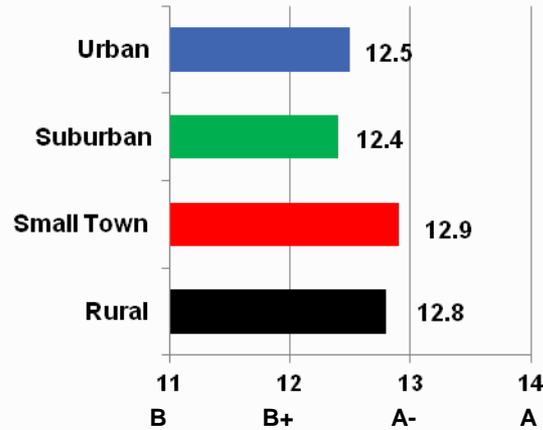


Bar managers in rural locations graded their ABC stores lower in reputation, yet higher in citizenship than those in other locations.

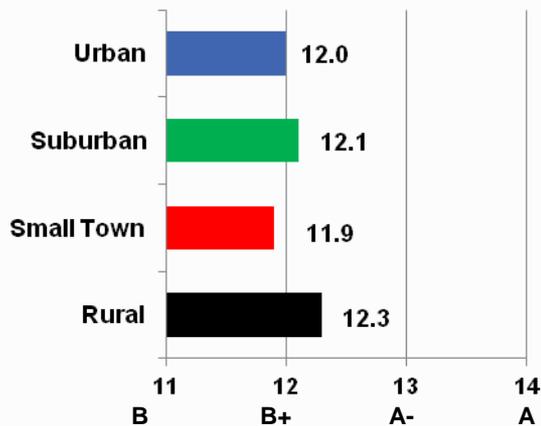
Reputation of the ABC store



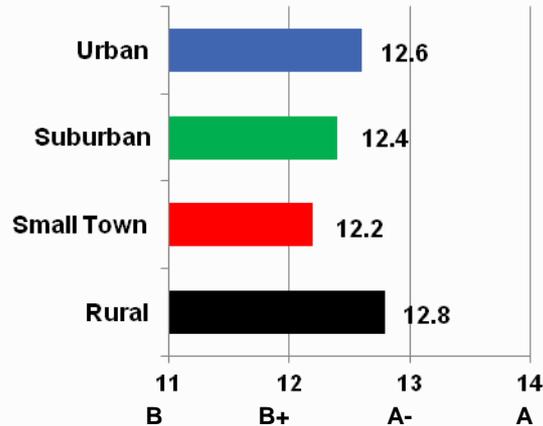
Governance and oversight by local ABC board



Store's citizenship promoting public health

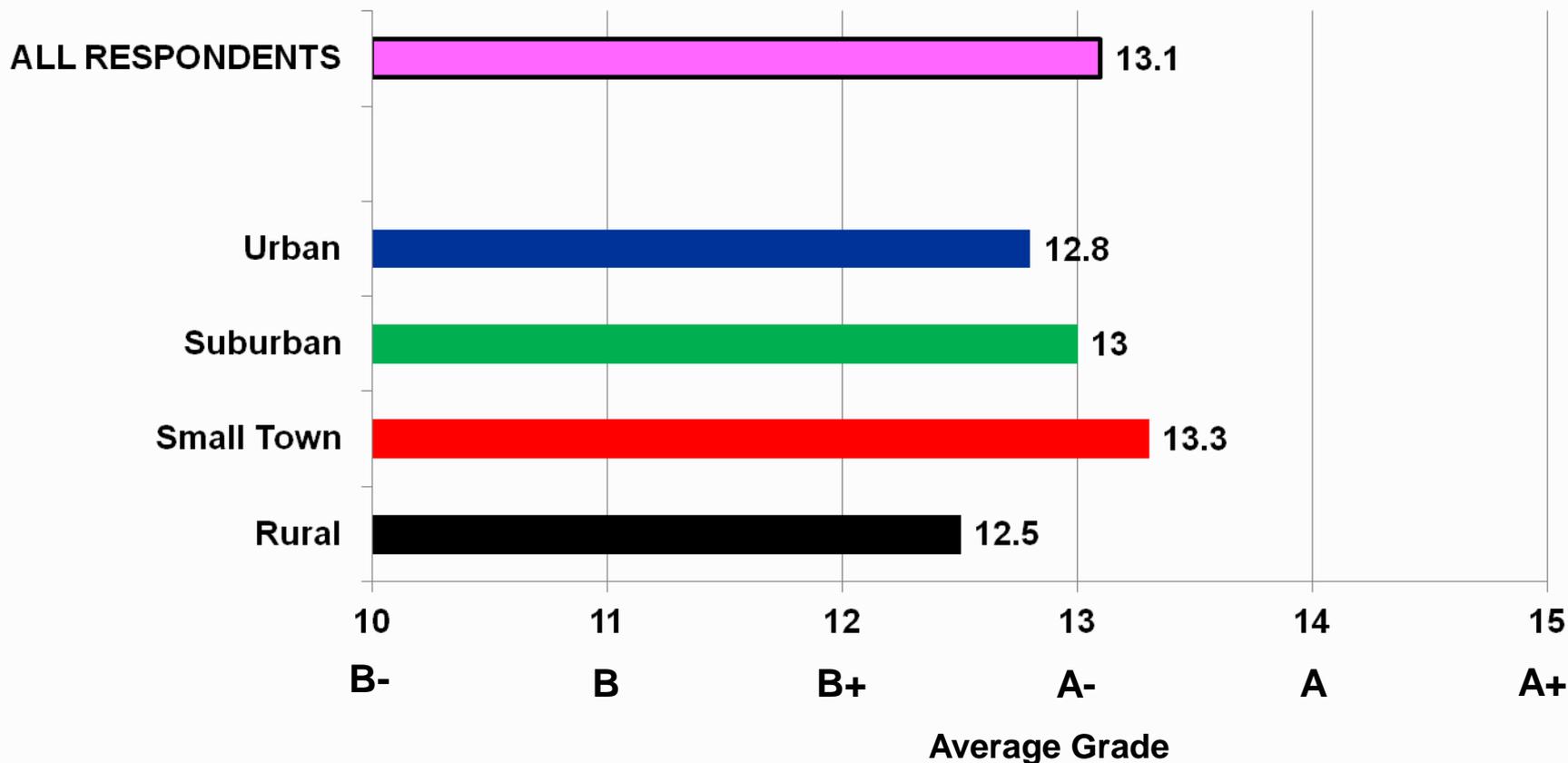


Store's citizenship promoting public safety



Bar and restaurant respondents in small town locations gave their ABC store the highest overall grade, while those in rural locations gave a less positive summary grade.

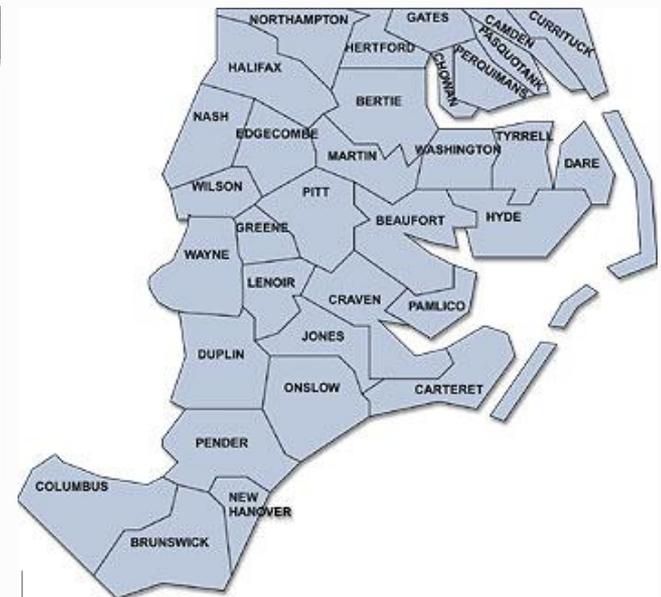
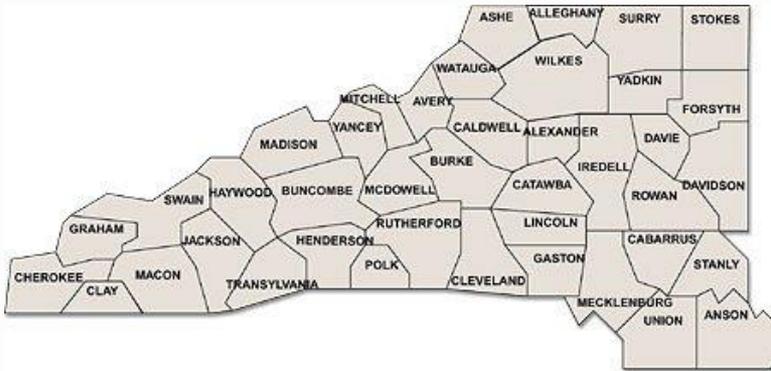
What overall summary grade would you give the NC ABC liquor store where you shop for your bar or restaurant?



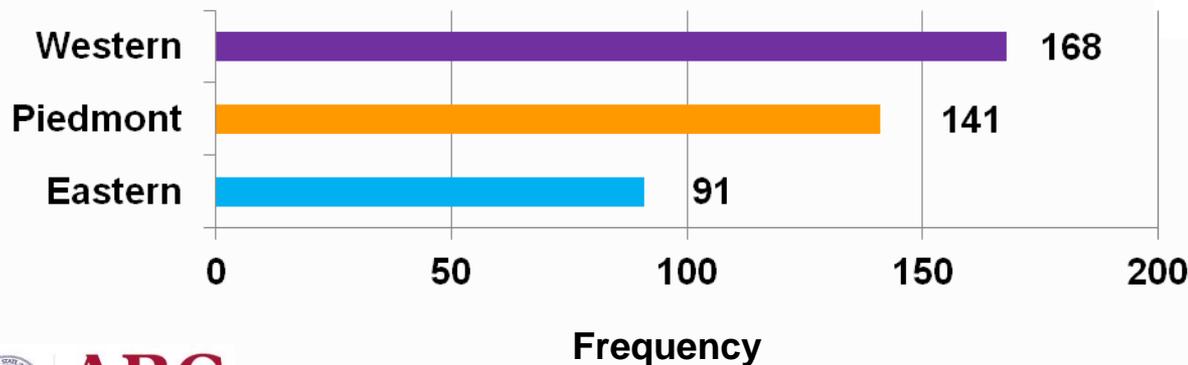
Analysis by NC regions – Western, Piedmont, Eastern

Respondent self-identified information also enables exploratory analysis by three NC geographic regions – Western vs. Piedmont vs. Eastern.

Regions

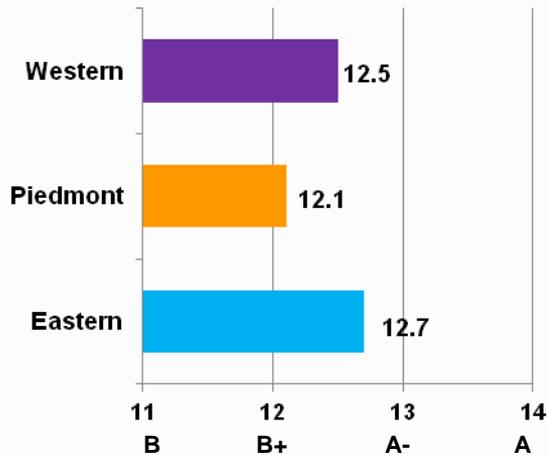


Number Respondents by Region

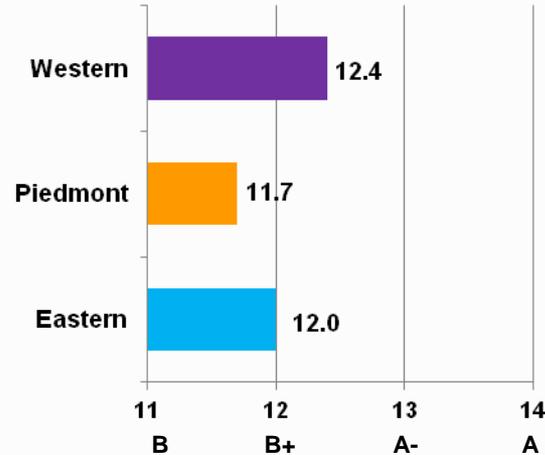


Safety in the ABC store's parking lot was graded high on average by bar managers in all locations.

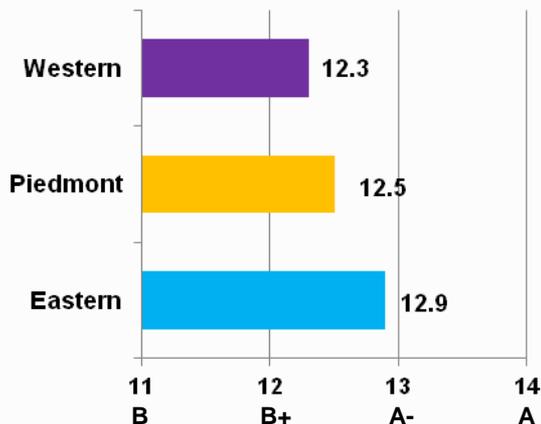
Exterior of the store is welcoming



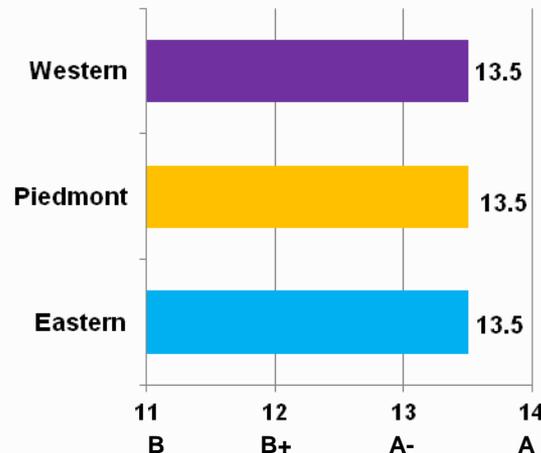
Outside attractiveness of the store



Visibility of outside signs identifying store

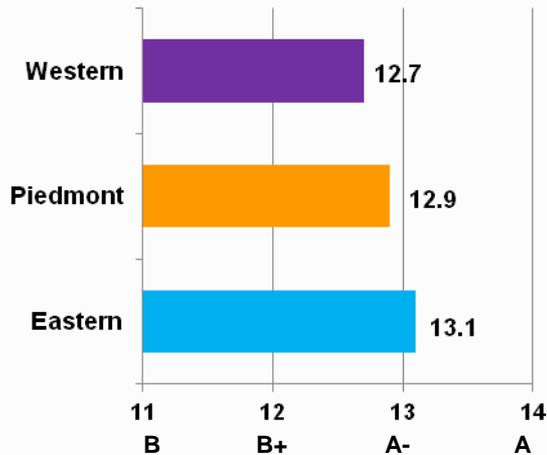


Safety in the store's parking lot

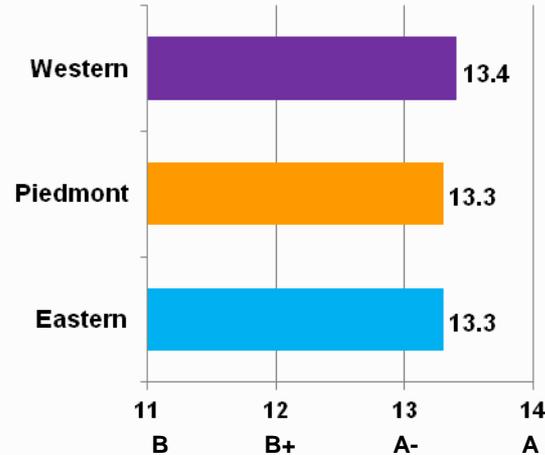


Bar managers in the Piedmont gave lower grades to their ABC stores for cleanliness and interior shopping factors.

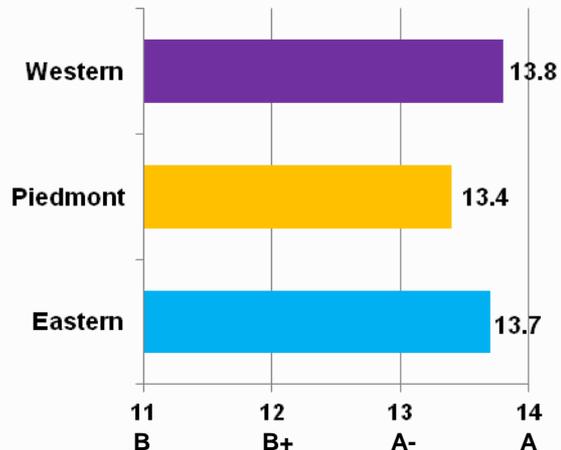
Convenience of store's location



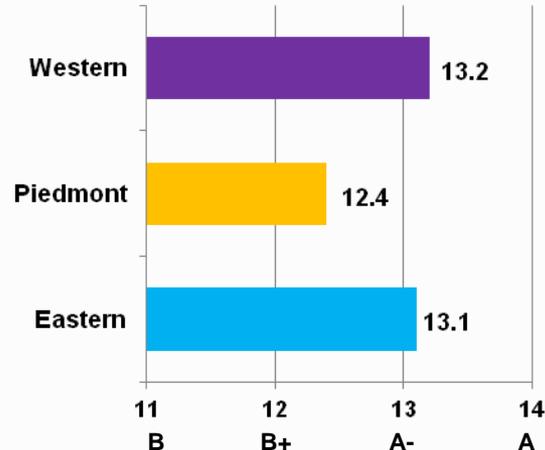
Convenience of interior layout



Cleanliness of the store's interior

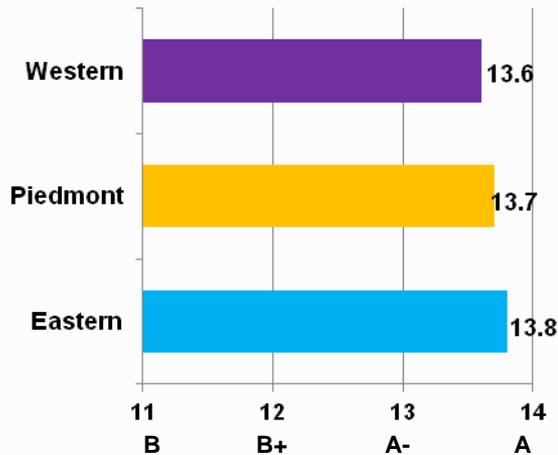


Interior of store encourages shopping

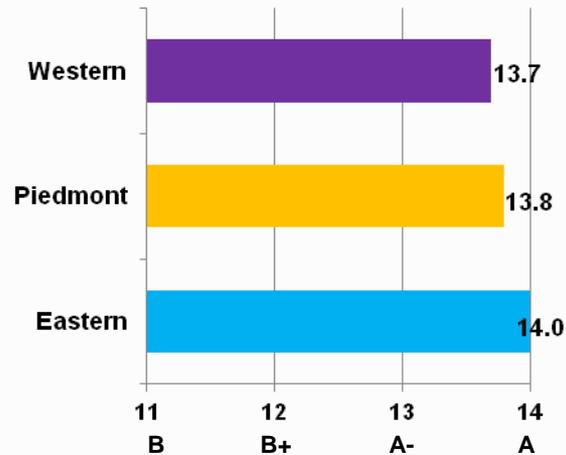


Bar managers in Eastern locations gave high grades to their ABC stores for courtesy of the staff and help in getting special orders.

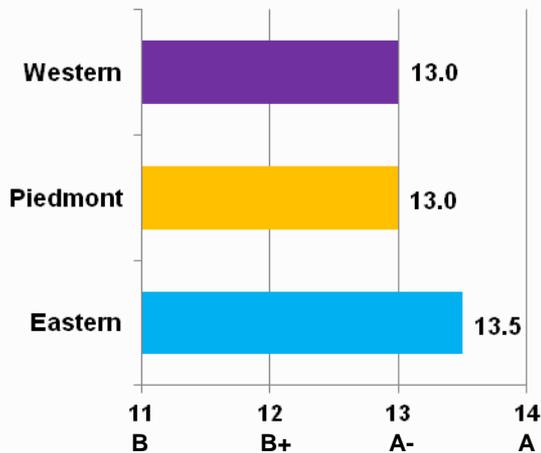
Professionalism of the staff



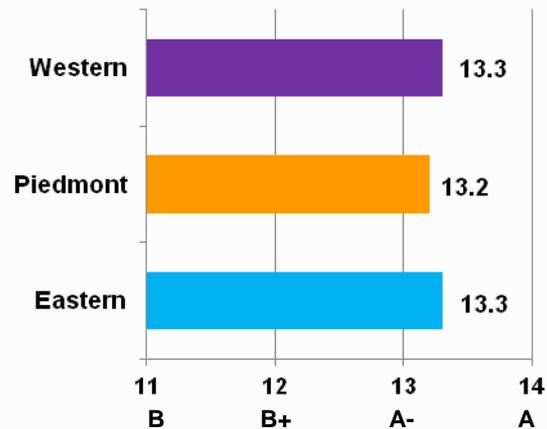
Courtesy of the staff



Helpfulness in getting special orders

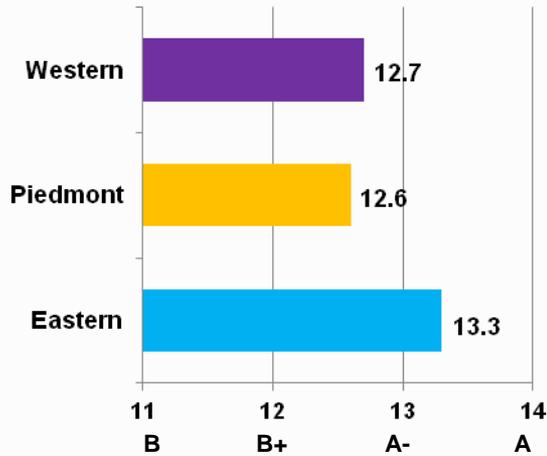


Number of staff members available to help customers

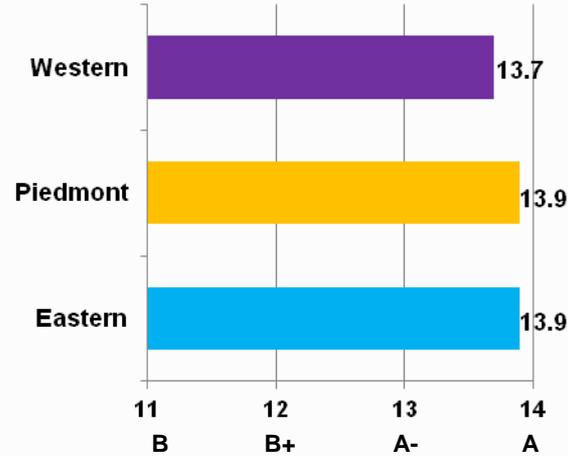


Bar managers in Eastern locations graded their ABC stores high for special orders and speed of checkout.

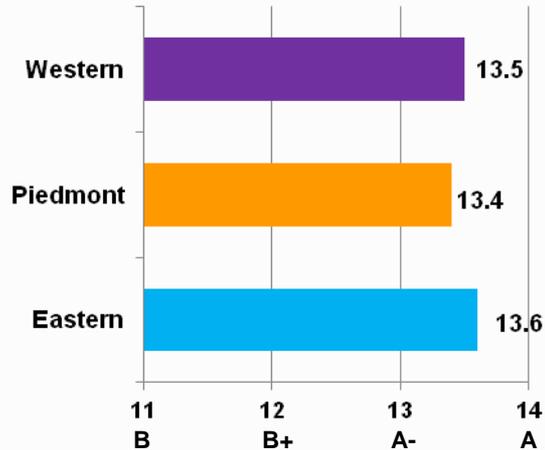
Special ordering liquors or brands



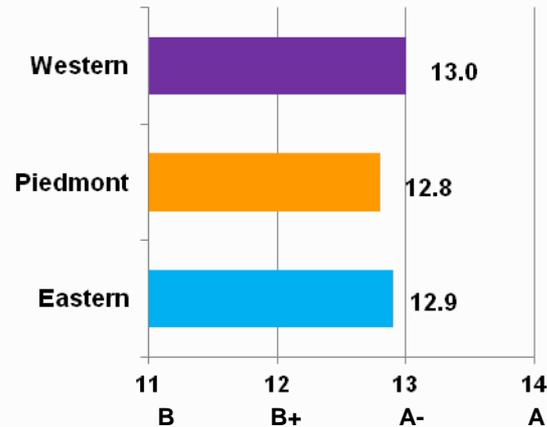
Getting your order correct



Speed of checkout

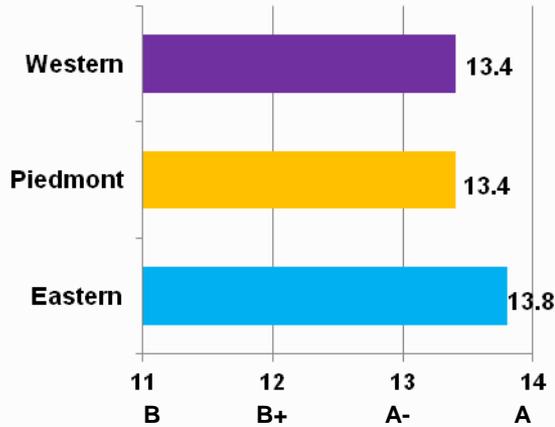


Convenience of store's operating hours

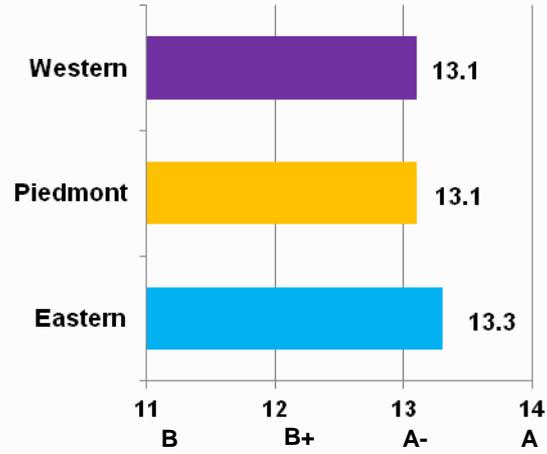


Bar managers in Eastern locations graded their ABC stores high in product factors, but low for reasonable prices and value for the money.

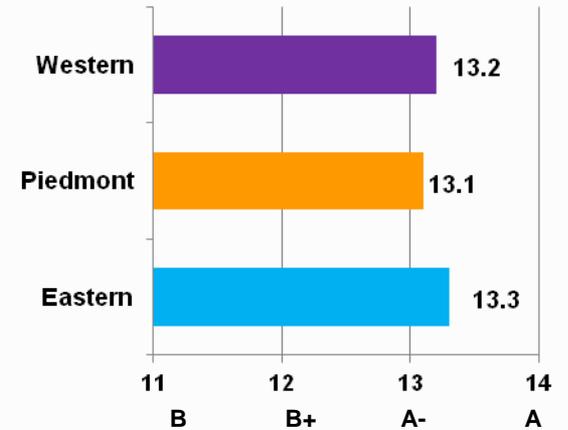
Staff's knowledge about products offered



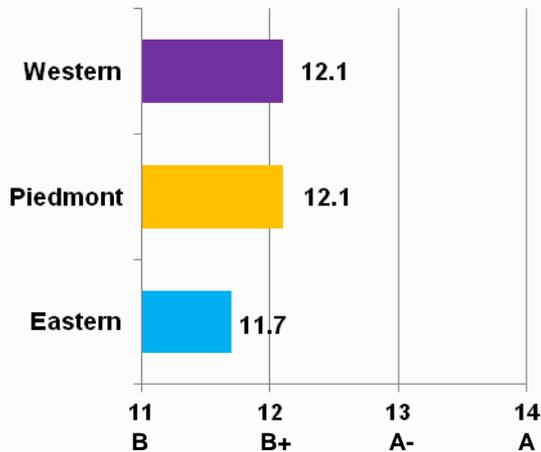
Selection of liquor offered



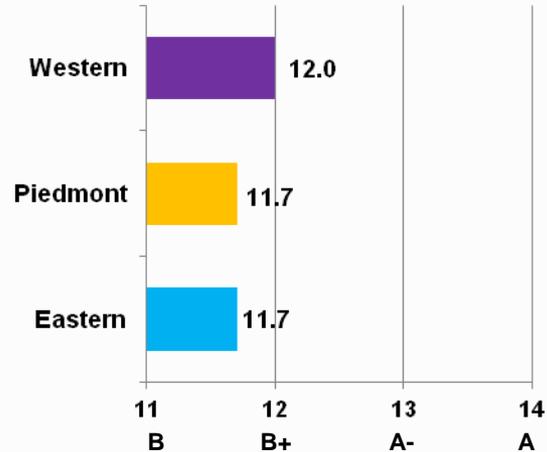
Adequate supply of the product you shop for



Store's prices are reasonable

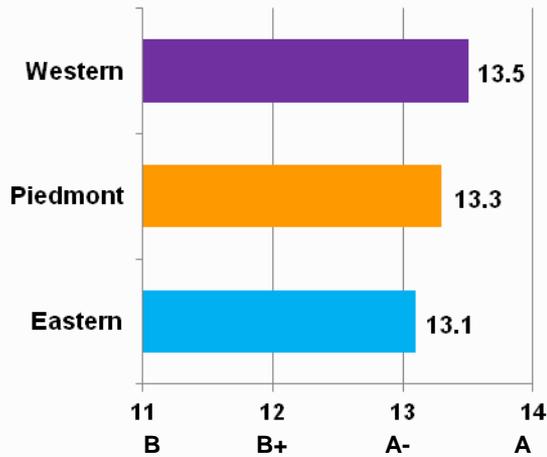


Value for the money

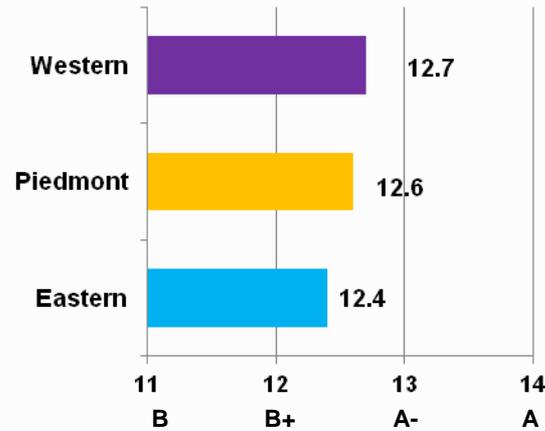


Bar managers in Western locations graded their ABC stores high in reputation, local board governance and oversight, and in public health and public safety citizenship.

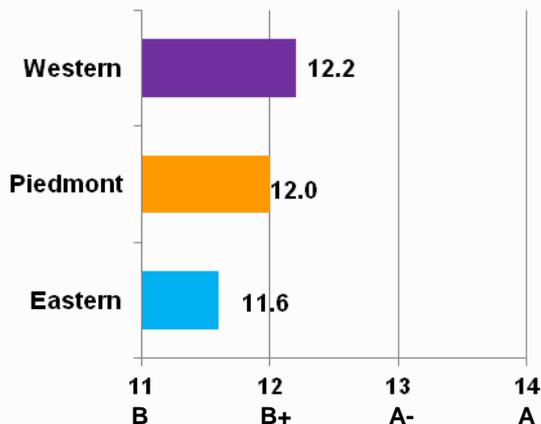
Reputation of the ABC store



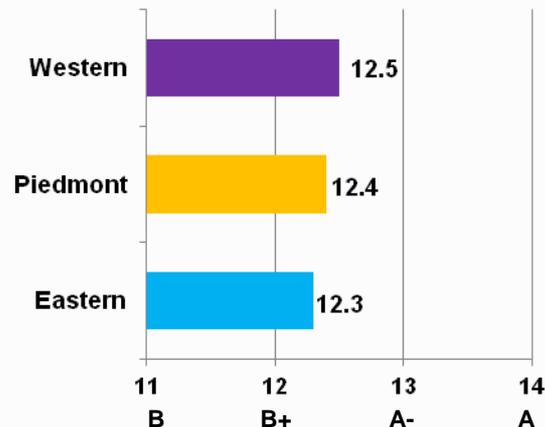
Governance and oversight by local ABC board



Store's citizenship promoting public health

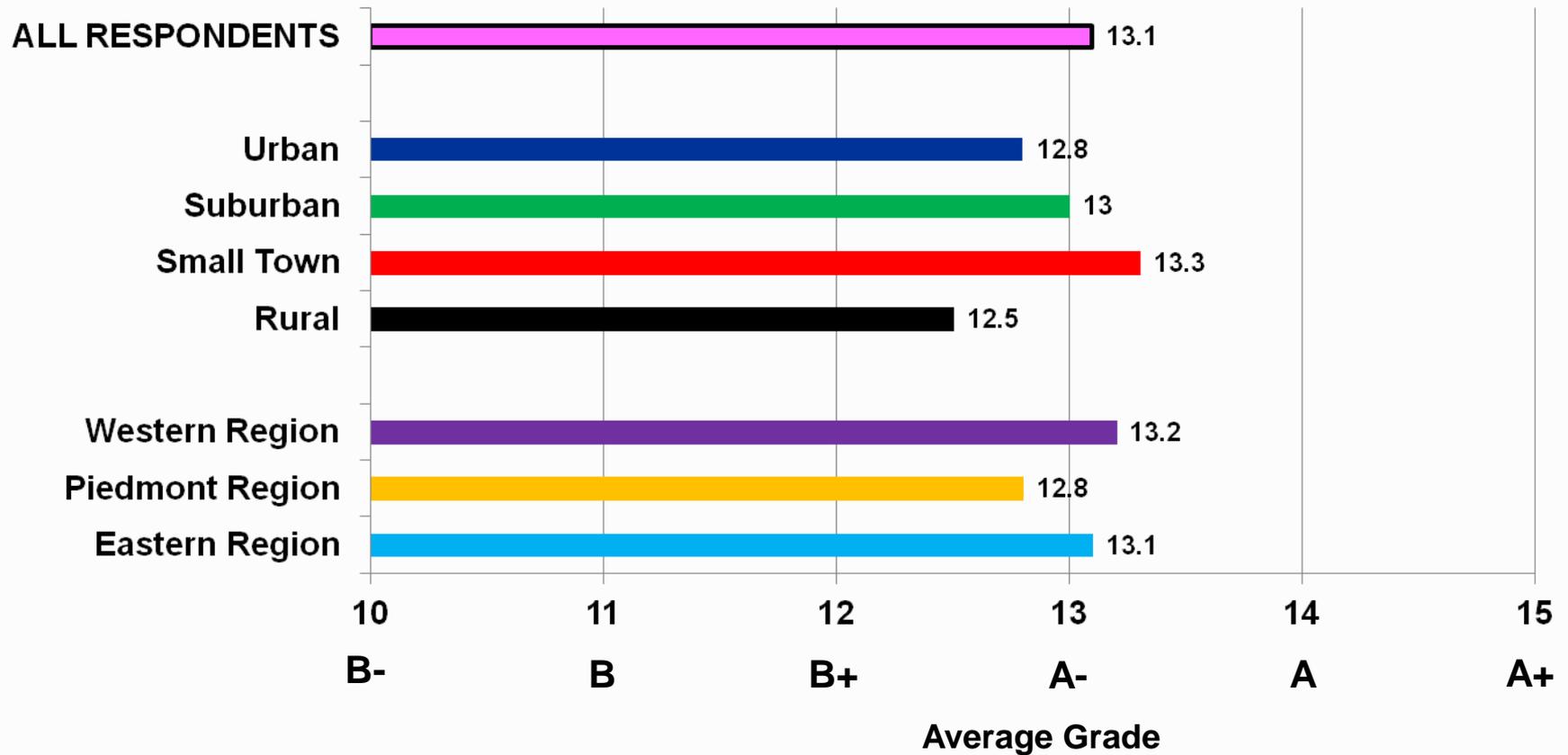


Store's citizenship promoting public safety



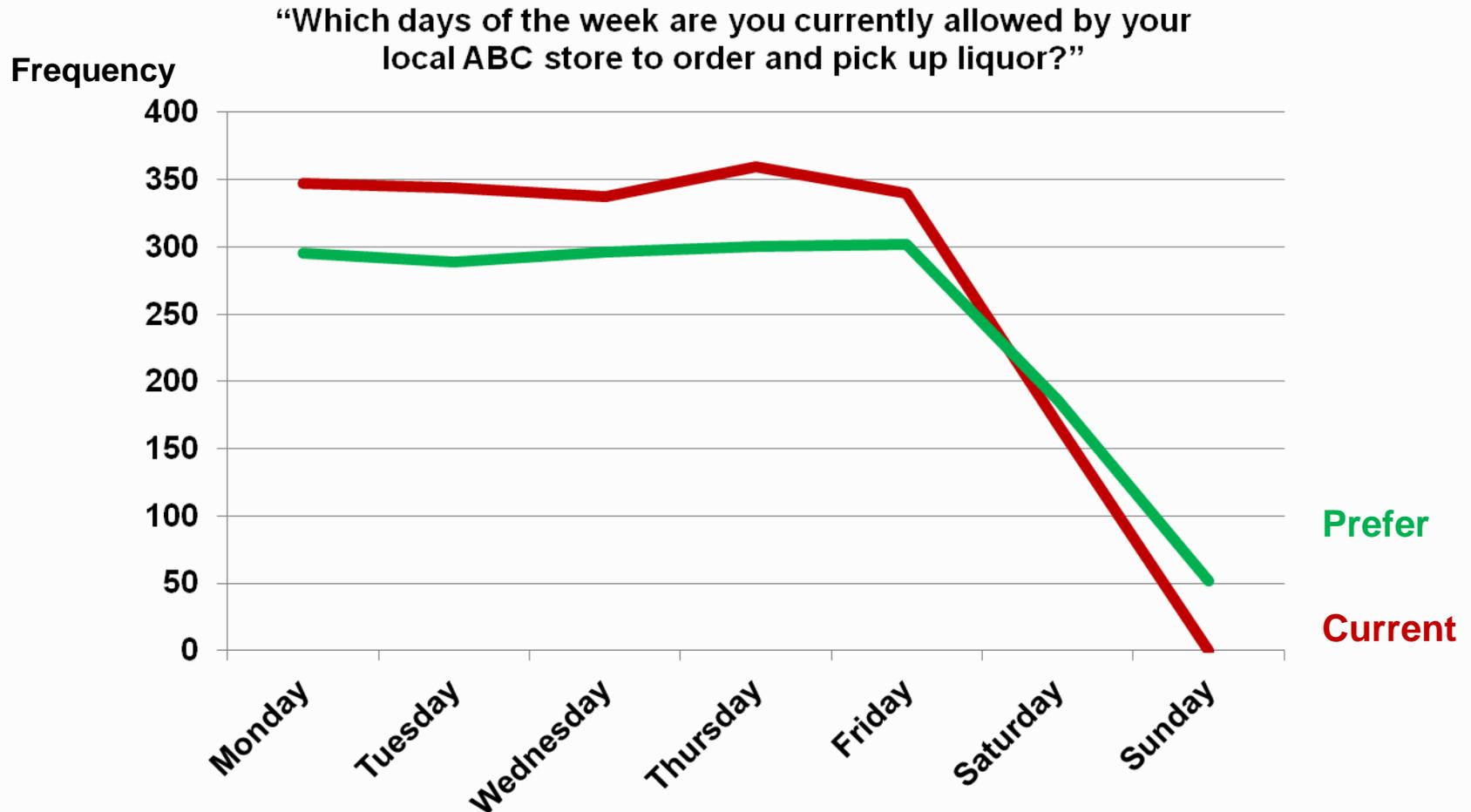
Respondents gave similar high overall summary grades across geographic regions, yet ABC stores in the Piedmont region did receive a less positive overall grade.

What overall summary grade would you give the NC ABC liquor store where you shop for your bar or restaurant?

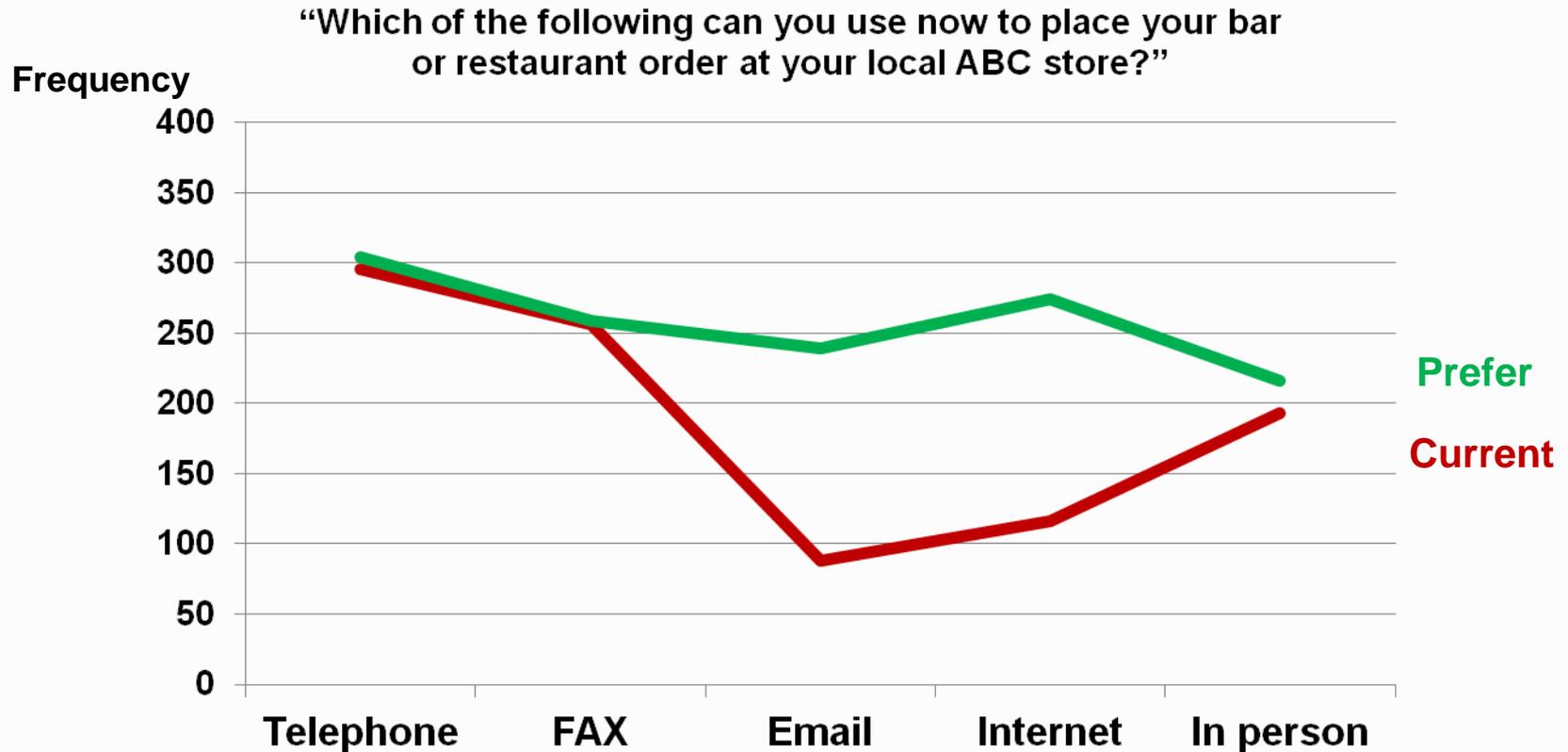


Other recommendations to improve customer service

The days of the week ABC stores are currently open generally match the preferences respondents have for the days they want to order and pick up liquor.

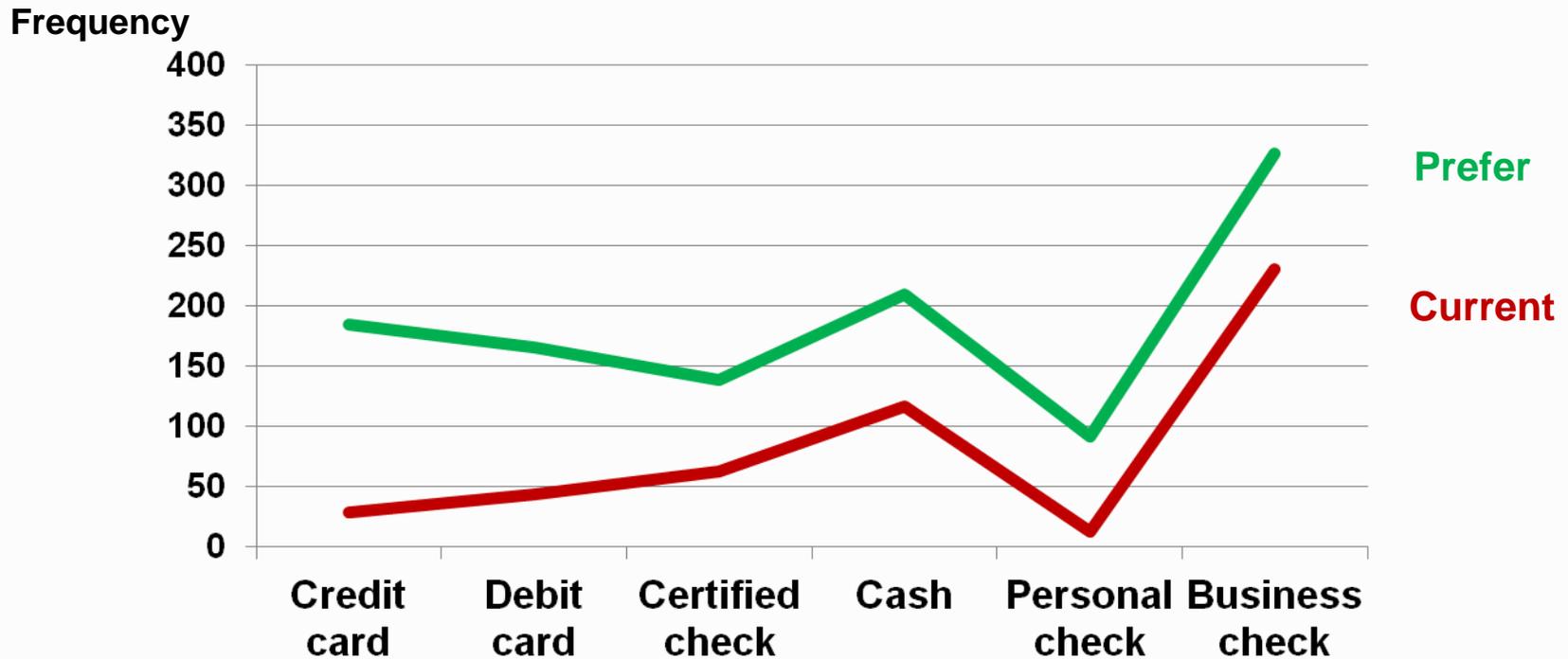


Placing an order by email or the Internet is currently available only at about 25% of ABC stores, and respondents would like to use these technologies as readily as others.



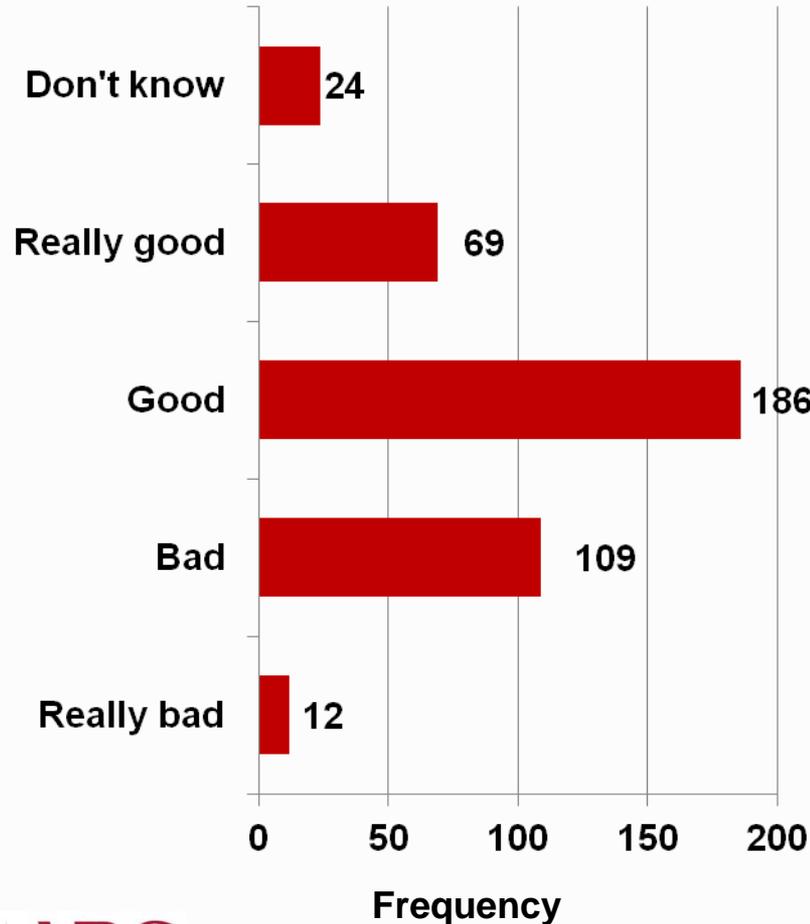
The biggest current gaps between current and preferred payment options are with ABC stores' current limited acceptance of credit cards and debit cards for payment.

“How can you pay for your order?”

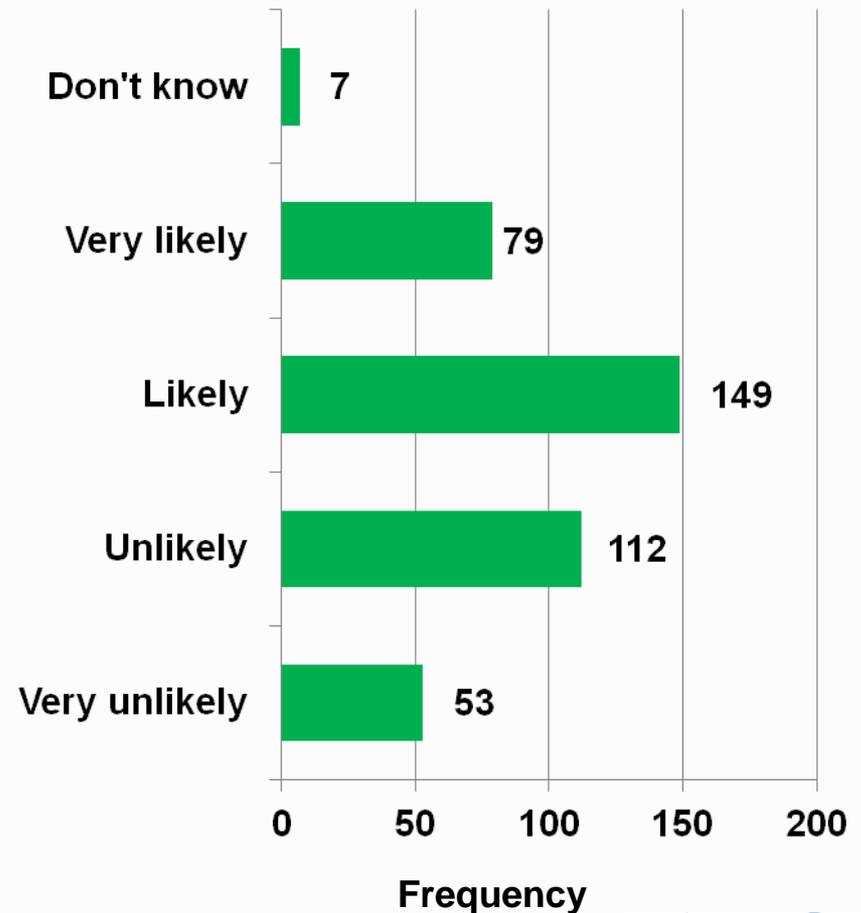


64% of respondents thought extending the hours of operation at ABC stores was a good idea, and 57% said they would be likely to shop during extended ABC store hours.

“What do you think of the idea to extend the hours of operation at ABC stores so they open earlier and close later?”

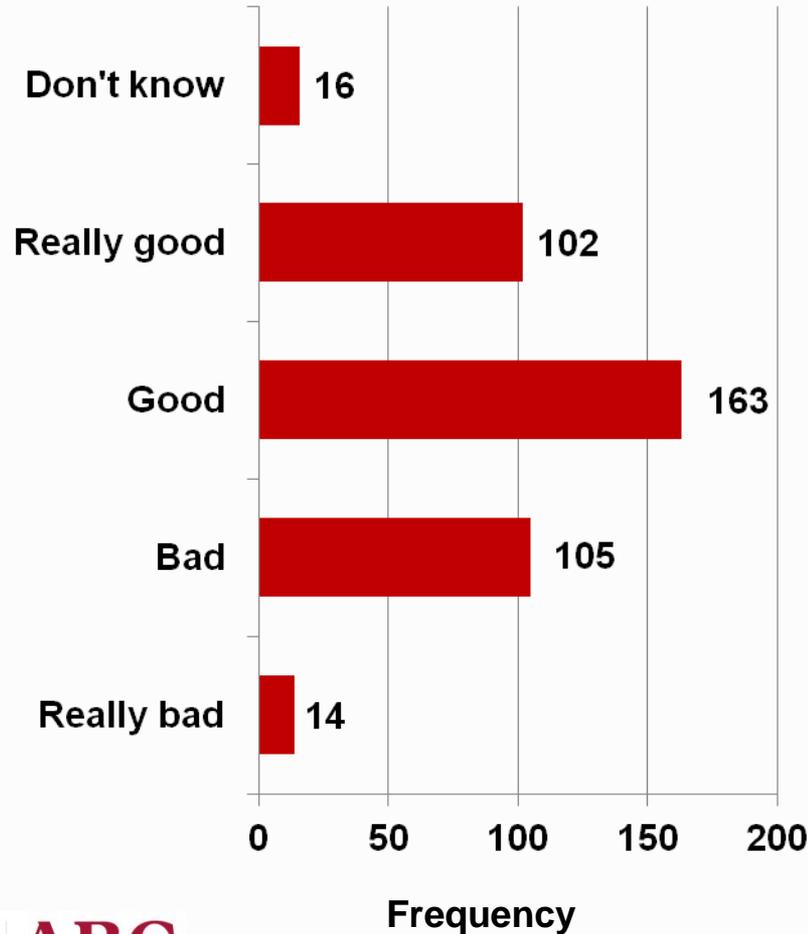


“How likely or unlikely would you be to shop at the ABC store earlier and/or later?”

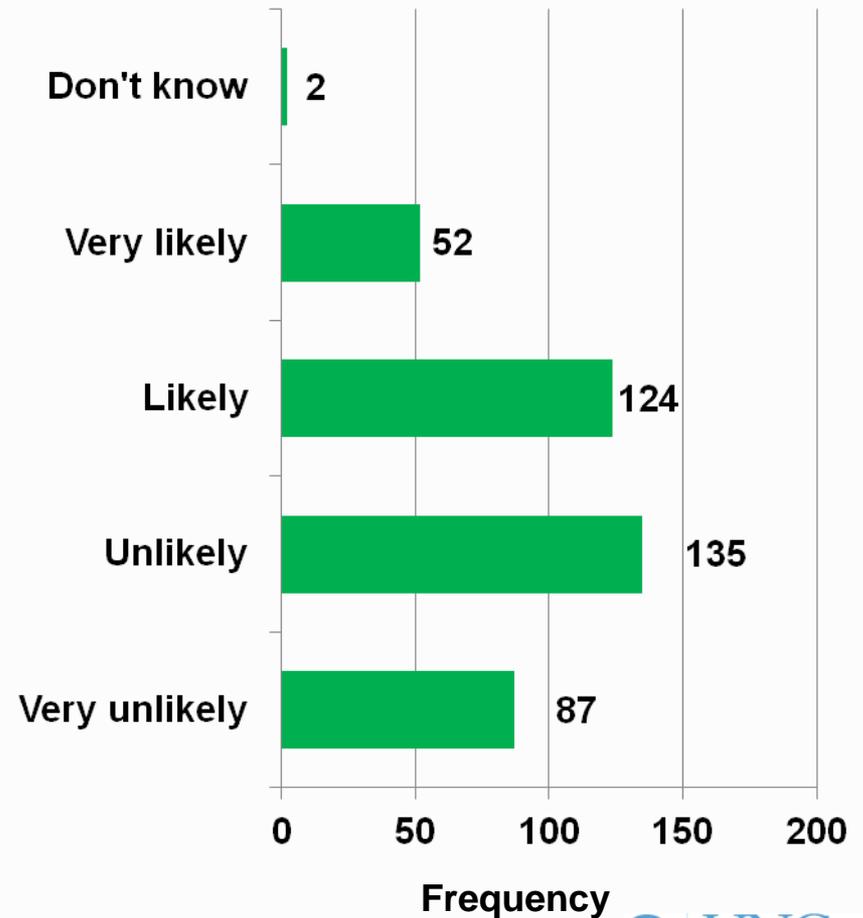


66% of respondents supported the idea of opening ABC stores on Sunday afternoons, and 44% said they would be likely to buy liquor on Sunday afternoons.

“What do you think of the idea to allow ABC stores to open on Sunday afternoons?”

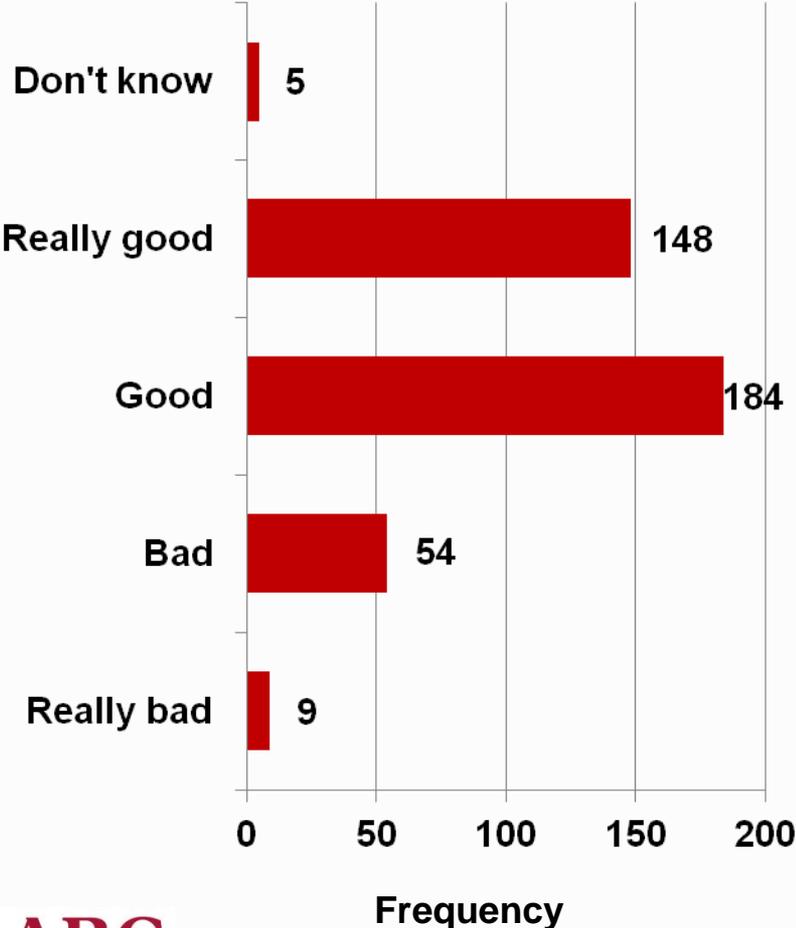


“How likely or unlikely would you be to buy liquor at the ABC store on Sunday afternoons?”

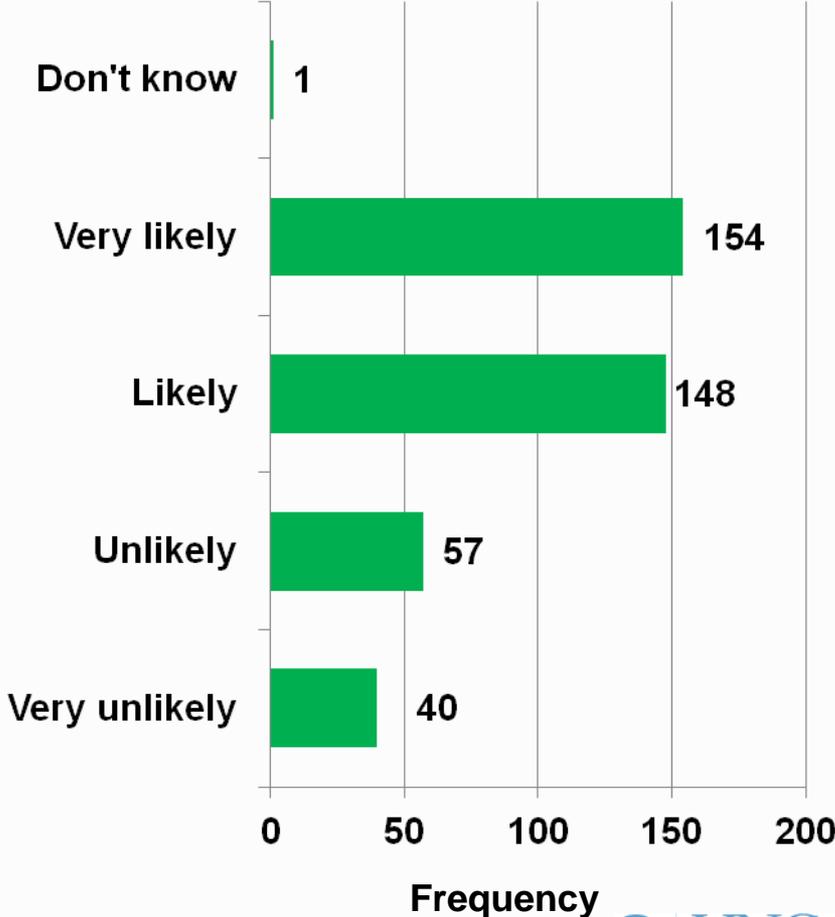


83% of respondents thought offering delivery service for a small additional fee was a good idea, and 76% said they would be likely to have the ABC store deliver their order.

“What do you think of the idea to offer a delivery service for a small additional fee?”



“How likely or unlikely would you be to have the ABC store deliver your order?”



The existing product assortment of types of liquors and brands available from the local liquor store seems reasonably adequate for most bars and restaurants.

Each of the 400 bar and restaurant customers was asked, “Are there types of liquors or brands not currently carried by the liquor store that you would like to see stocked?”

67 different customers offered 87 mentions of types of liquor or brands they would like to see stocked...

- 32 of these 87, or 37%, are already listed
- 28 of these 87, or 32%, are available by Special Order

