

NC ABC Commission Market Research Project

Customer and Non-customer Survey Results

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Analysis by NC residency – native, long time resident, relative newcomer

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:

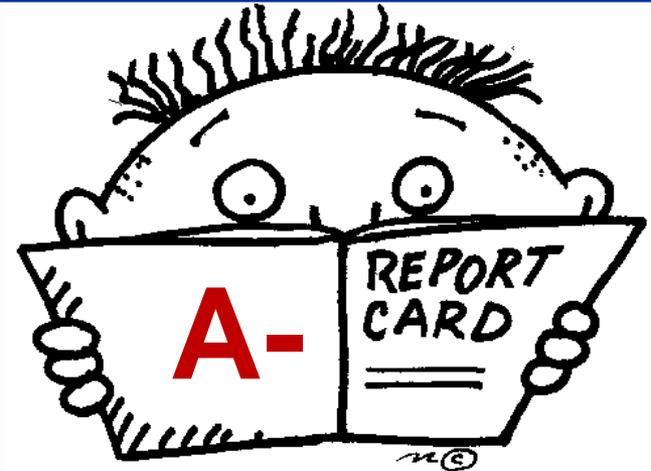
- **Random sample of local NC ABC store customers and adult non-customers**
- **424 completed telephone interviews with customers**
- **400 completed telephone interviews with non-customers**
- **Respondents graded local ABC store performance on customer service dimensions**
- **Solicited suggestions for improving customer service**
- **Tested several possible innovations and 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

Customers graded the ABC store where they shop an average of “A-” as an overall summary grade

Customers gave particularly high grades to:

- Cleanliness of store’s interior and convenience of the interior layout
- Courtesy and professionalism of the staff
- Product supply and selection
- Staff’s knowledge about products offered
- Speed of checkout



Customers gave lower grades to:

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



These were unknown to many respondents...

Customers graded the ABC store where they shop most often “A-” which was HIGHER overall than they graded their local drug store, discount store, bank, or grocery store



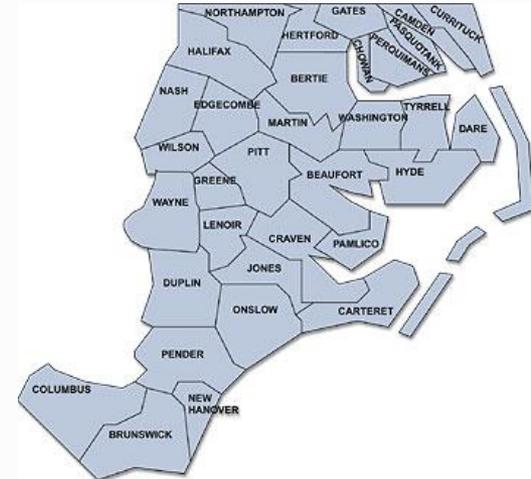
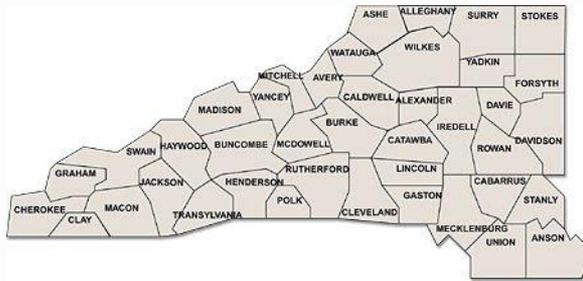
A-





North Carolina customers consistently gave their ABC store and staff higher grades in 2011 than did Washington State customers in 2010.

North Carolina customers and non-customers support for new customer service ideas and convenience improvements were similar to those in Washington State.



Analysis by urban versus suburban versus small town versus rural location showed no consistent location effects in customer service evaluation scores, although customers in rural communities graded their ABC store higher overall than those in other locations.

Customers in the Piedmont region of the state generally graded their ABC store lower in store and customer service characteristics than did customers in the Western or Eastern regions of North Carolina.

Newcomer customers generally graded their ABC store lower than did customers who were long time residents or native to the state.



Many customers and non-customers know nothing about governance and oversight by the local ABC board, the local store's community citizenship in promoting public health, or the local store's community citizenship in promoting public safety.

How can local ABC stores improve customer service?

- Allow customers to order online or by email, then pick up orders in the ABC store
 - 71% of customers and 43% of non-customers said this is a good idea



- Open ABC stores on Sunday afternoons
 - 65% of customers and 27% of non-customers said this was a good idea

- Expand the sale of non-alcoholic items available at the ABC store
 - 60% of customers and 54% of non-customers said this is a good idea



How can local ABC stores improve customer service? Continued...

- Operate ABC stores inside other stores, like coffee shops and banks do now
 - 55% of customers and 21% of non-customers said this was a good idea



- Extend hours of store operation
 - 51% of customers and 14% of non-customers said this way a good idea

- Allow sample tastings inside ABC stores
 - 42% of customers and 23% of non-customers said this was a good idea
- Sell lottery tickets inside ABC stores
 - 37% of customers and 33% of non-customers said this was a good idea



How else can local ABC stores improve service to their customers?

- **Upgrade the store's exterior, parking lot, lighting, and signage.**
- **Clarify the local ABC board's role and conduct in governance and oversight.**
- **Demonstrate good community citizenship and leadership in promoting public health and public safety.**



Survey method and respondent profile

The 824 total survey respondents are reasonably representative of local ABC store customers and adult non-customers across North Carolina

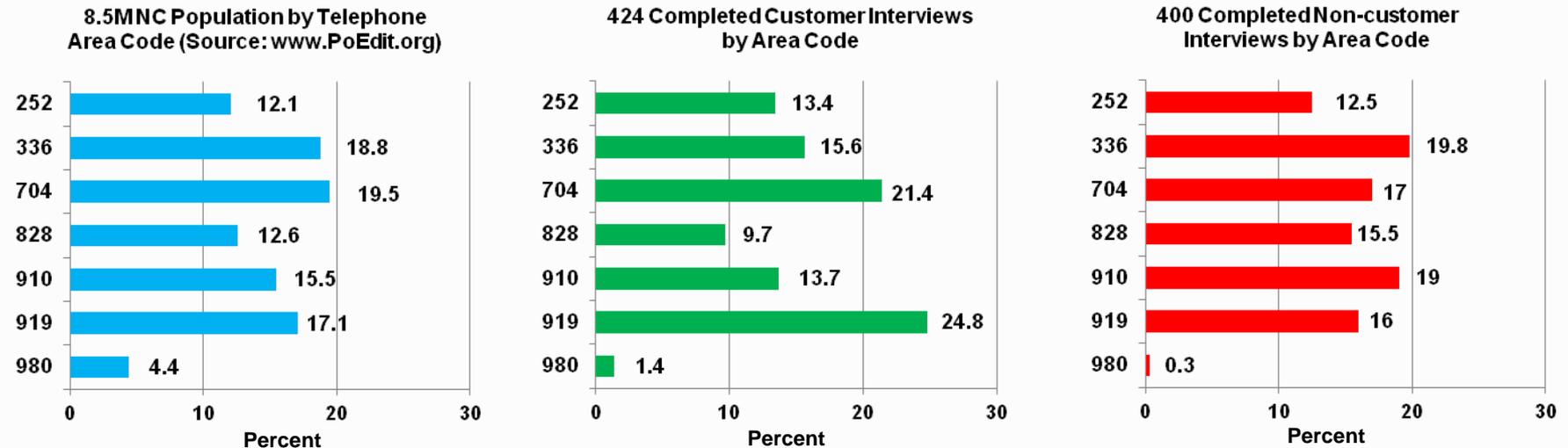
Random digit dialing of landline and wireless telephone numbers across North Carolina, with completion quotas weighted 75% landline and 25% wireless to match landline vs. wireless mix across the state.

424 completed customer interviews with person "... who has shopped at a NC ABC liquor store in the last year or so"

400 completed non-customer interviews with adult "... who has NOT shopped at a NC ABC liquor store in the past year or so nor has anyone else in their household".

Interviews conducted in November and December 2011.

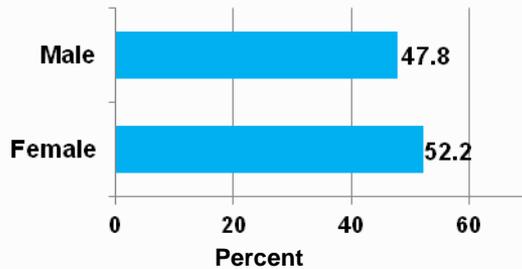
NC Population by Telephone Area Code vs Completed Customer and Non-customer Interviews



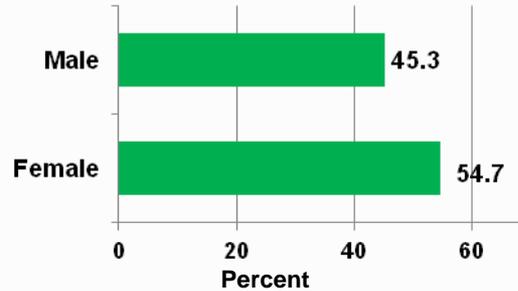
Customer respondents are similar to the NC adult population by gender and slightly younger by age; non-customer respondents are slightly older and female.

NC Adult Population by Gender vs Customer and Non-customer Respondents

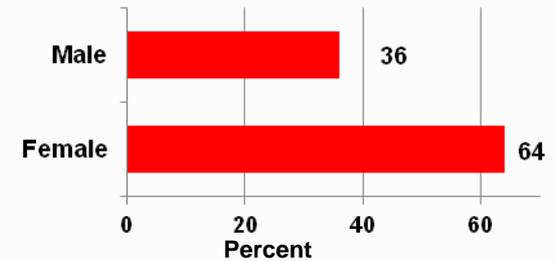
6.8MNC Adult Population by Gender
(Source: 2010 Census)



Customer Respondents by Gender

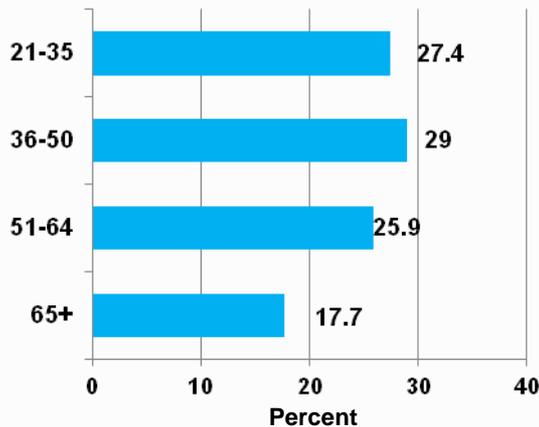


Non-customer Respondents by Gender

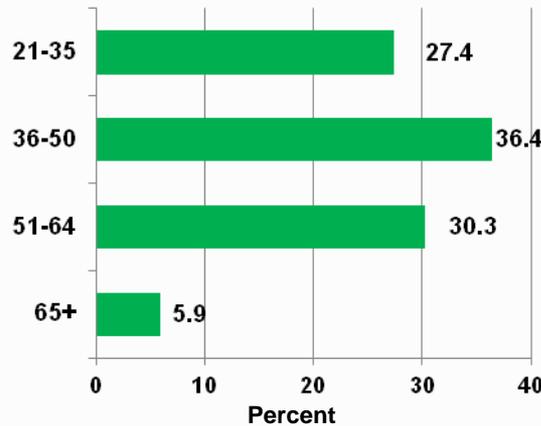


NC Adult Population by Age Categories vs Customer and Non-customer Respondents

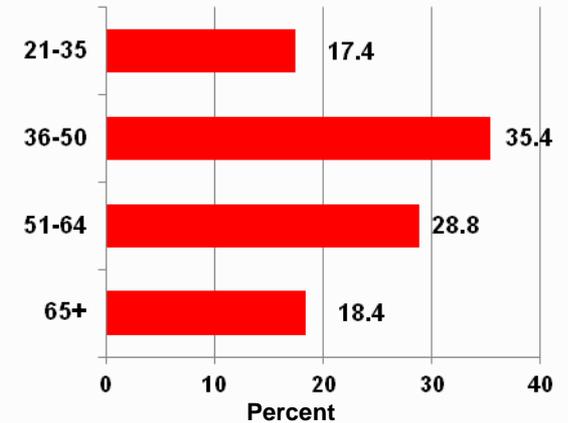
6.8MNC Adult Population by Age Categories (Source: 2010 Census)



Customer Respondents by Age Category

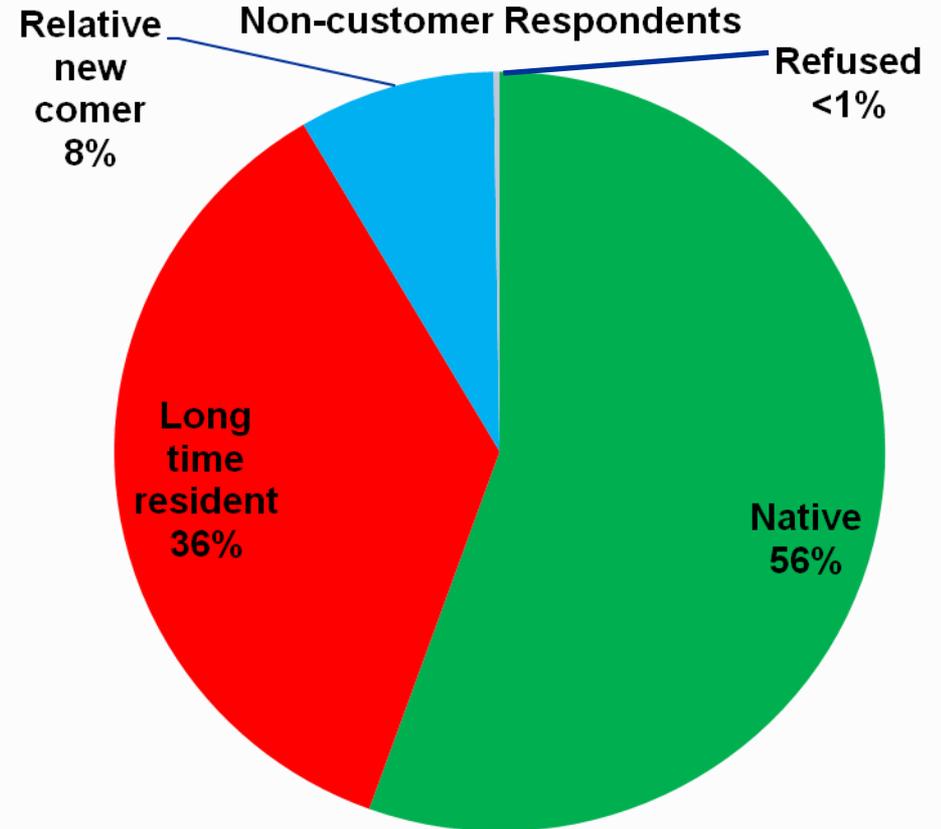
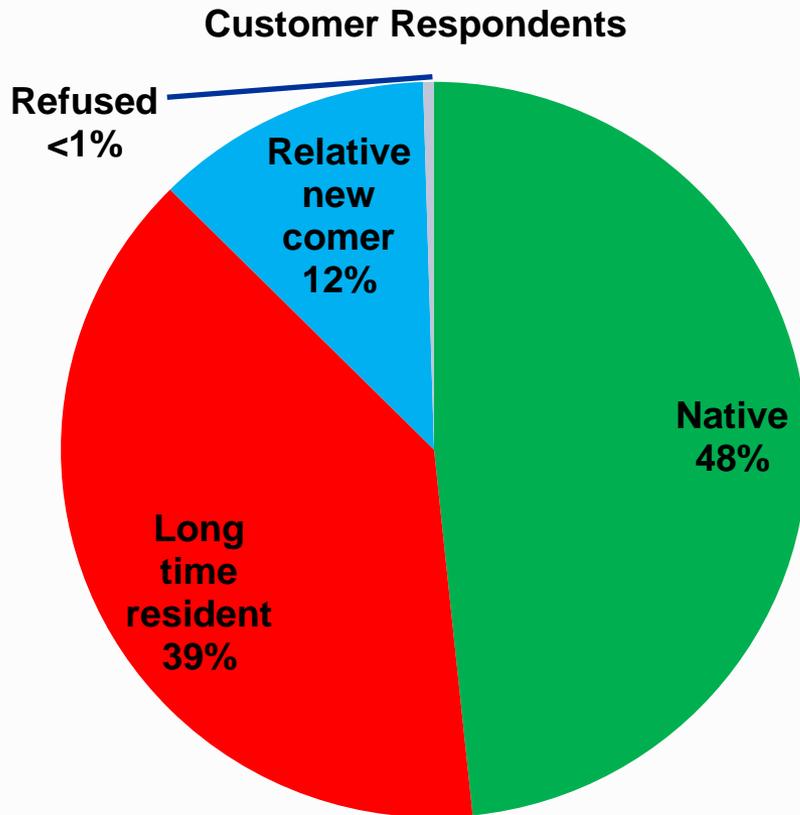


Non-customer Respondents by Age Category



Customer and Non-customer respondents are similar in considering themselves natives or long time residents of North Carolina.

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

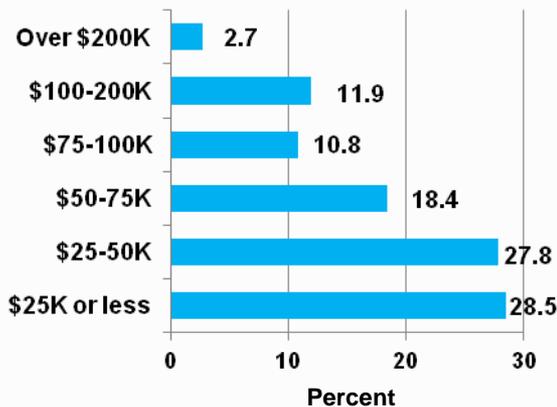


Customer respondents have higher annual household incomes on average than do Non-customers.

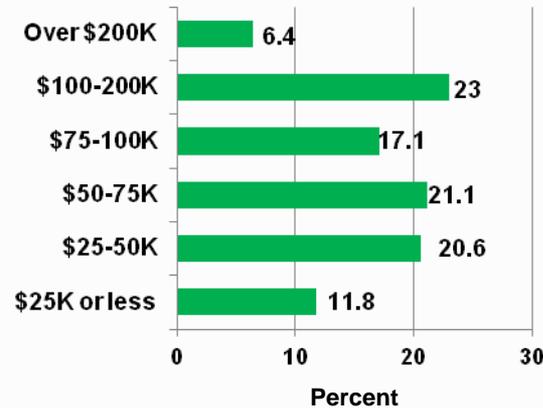
I am going to read some broad annual household income categories. Just stop me when I get to the category that best describes your approximate annual household income before taxes this year.

NC Households by Annual Income Categories vs Customer and Non-customer Respondents

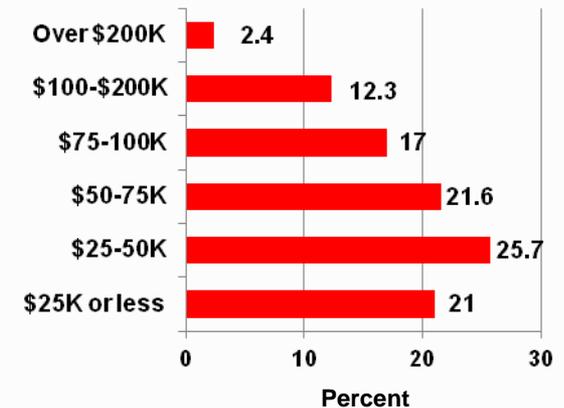
3.7MNC Households by Income Categories (Source: Census 2010 ACS)



Customer Respondents by Household Income Categories (50 of 424 REFUSED TO ANSWER OR DK)



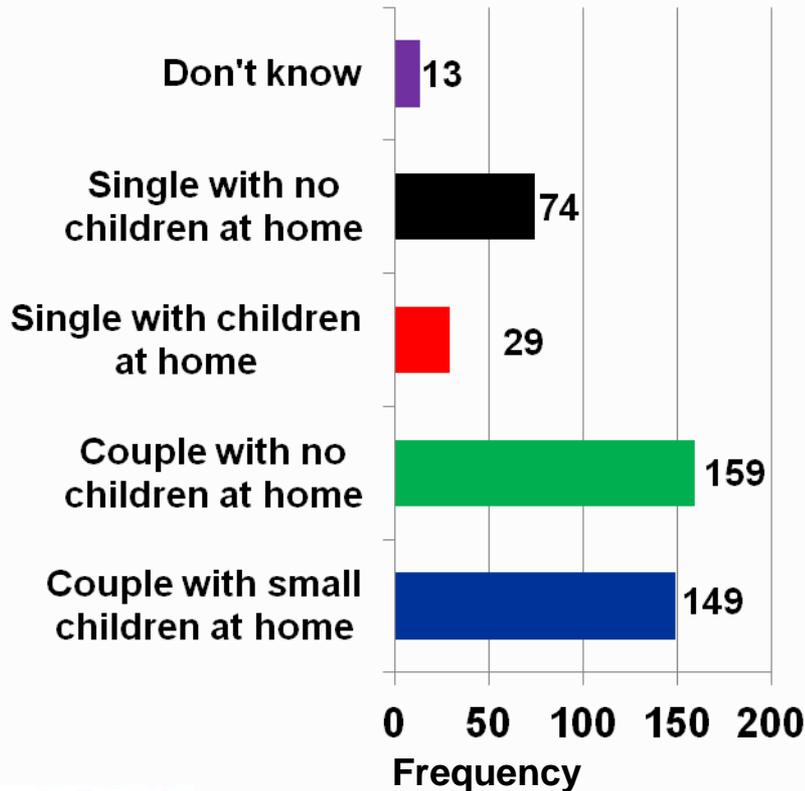
Non-customer Respondents by Household Income Categories (66 of 400 REFUSED TO ANSWER OR DK)



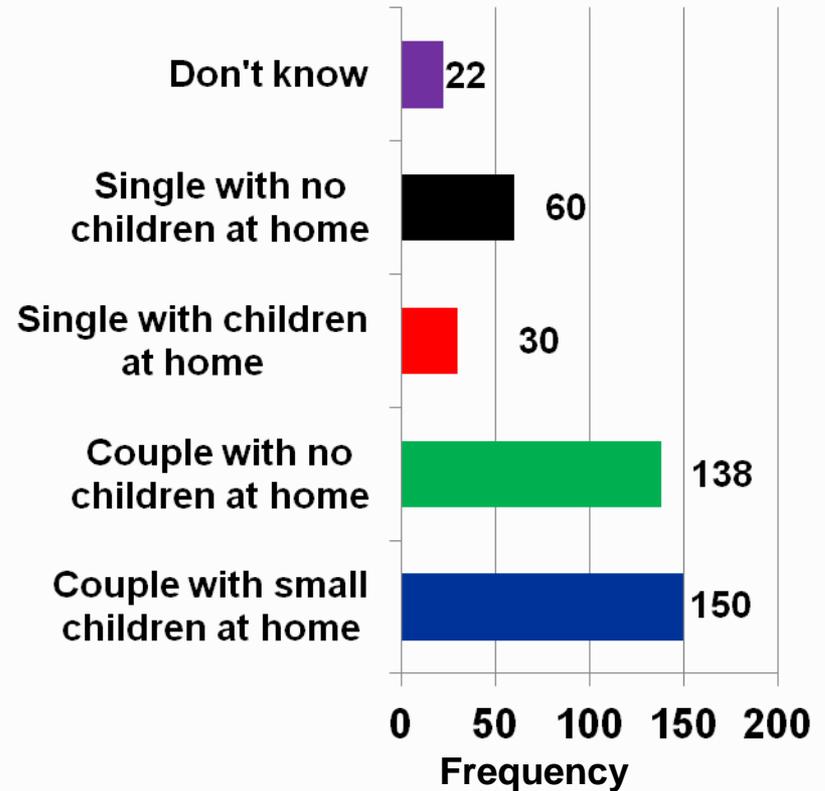
Customer and non-customer respondents were similar with most being couples and about equally mixed with children at home or not.

Which best describes your household at this time?

NC ABC Store Customers

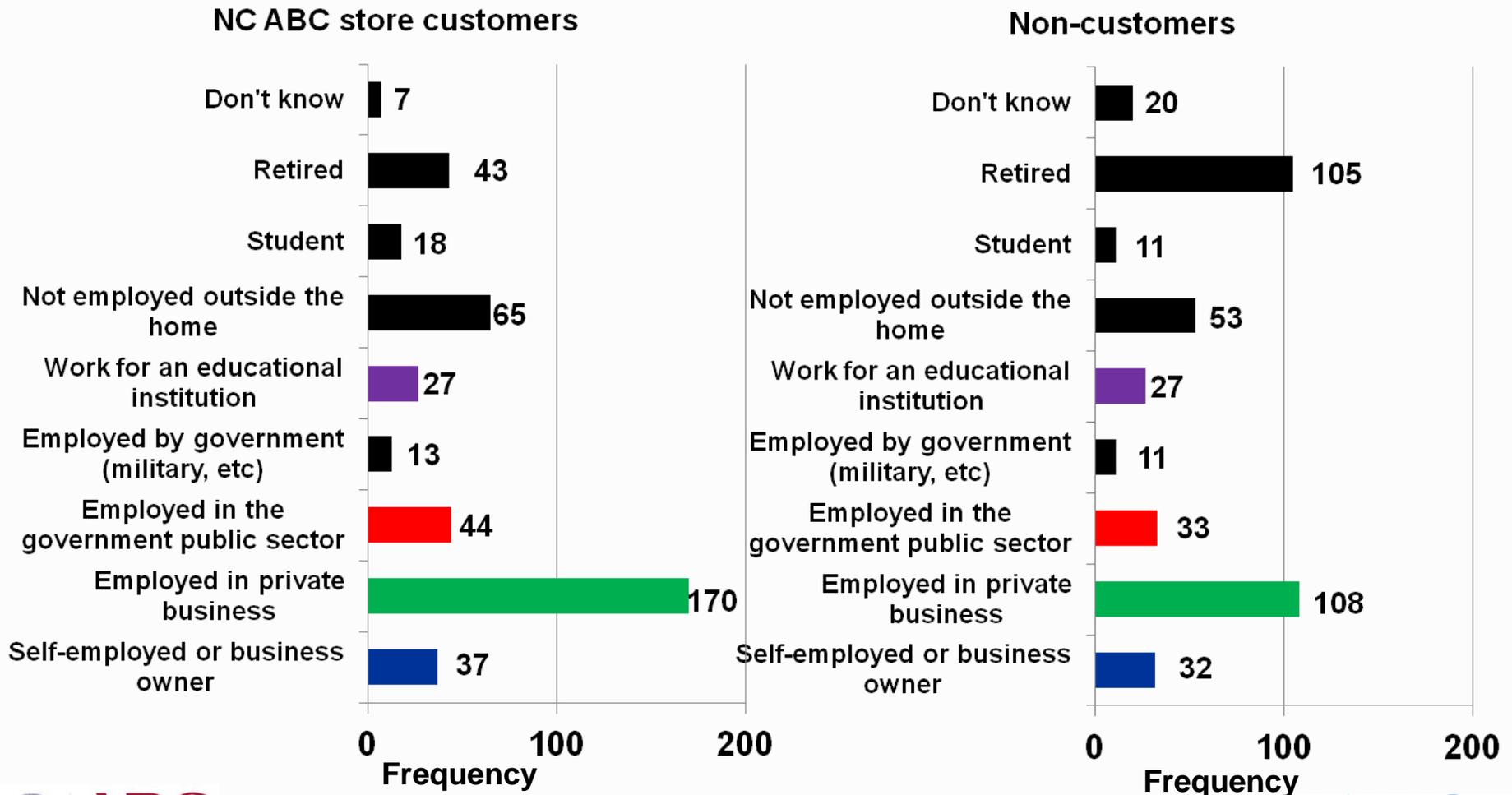


Non-customers



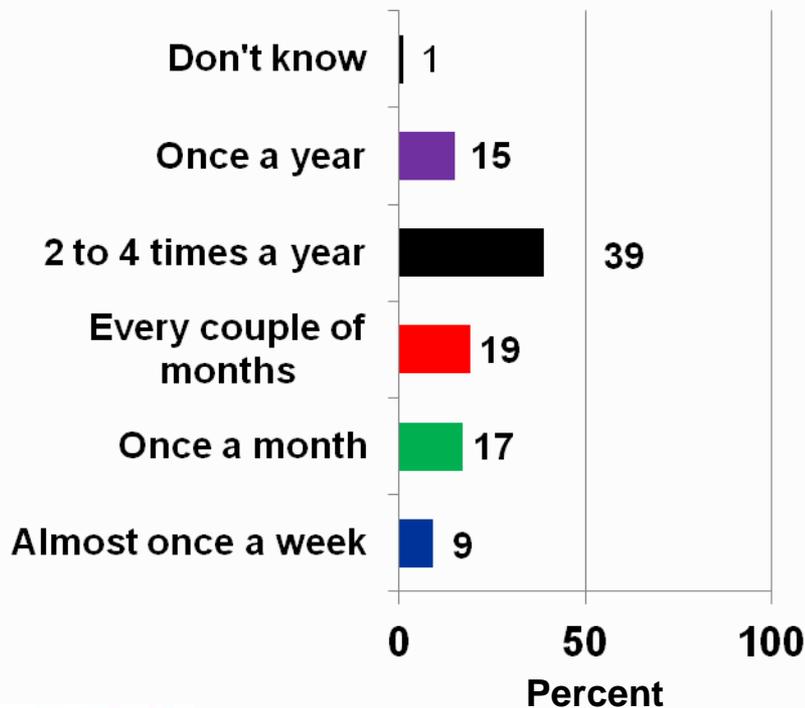
Customer and non-customer respondents were similar in employment with most employed in private business; more retirees were non-customers.

Which of the following best describes you at this time?

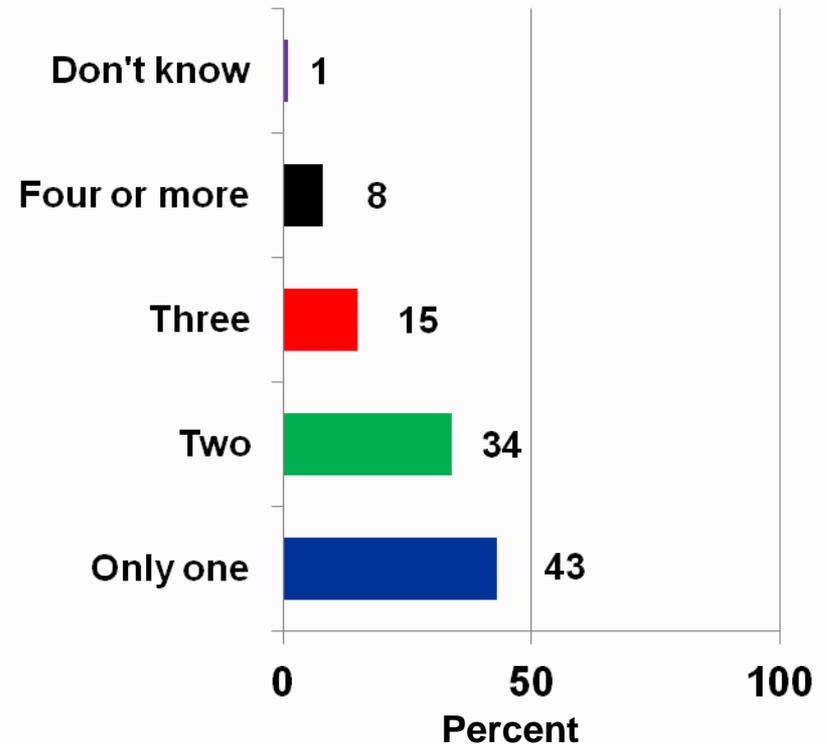


The average customer reported shopping 2 to 4 times at two different ABC stores within the past year or so.

How often would you say you shopped at a NC ABC liquor store within the past year or so?



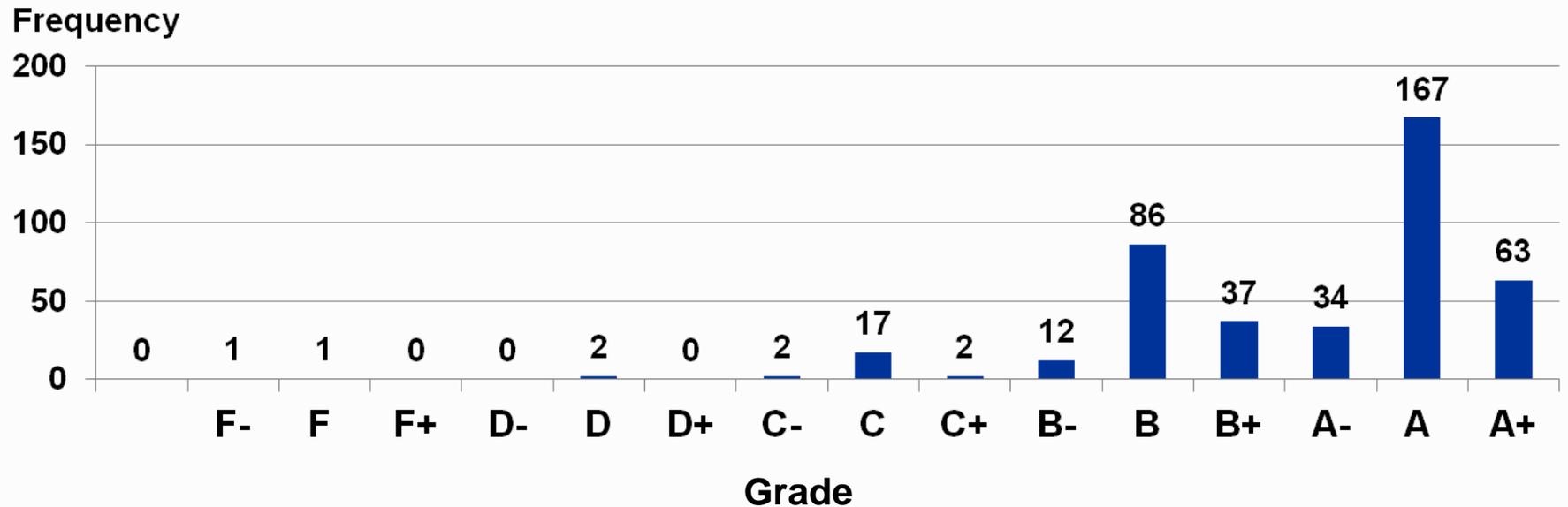
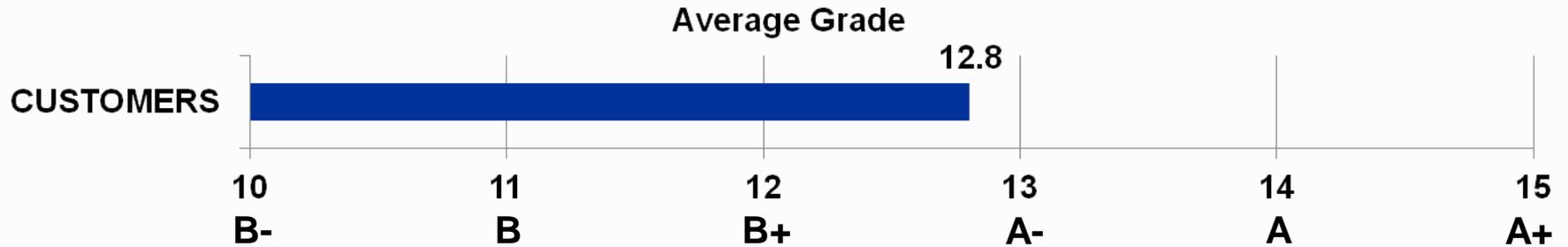
How many different ABC stores did you shop within the past year or so?



Overall results

The 424 customers surveyed graded the ABC store where they shop most often an average of A- overall.

What overall summary grade would you give the NC ABC liquor store where you shop most often?



Why did you give them that grade?

Customer service is generally good!

- *It's very homey and very welcoming.*
- *It is convenient and the people are always friendly.*
- *The location and layout of the store make it easy to shop at.*

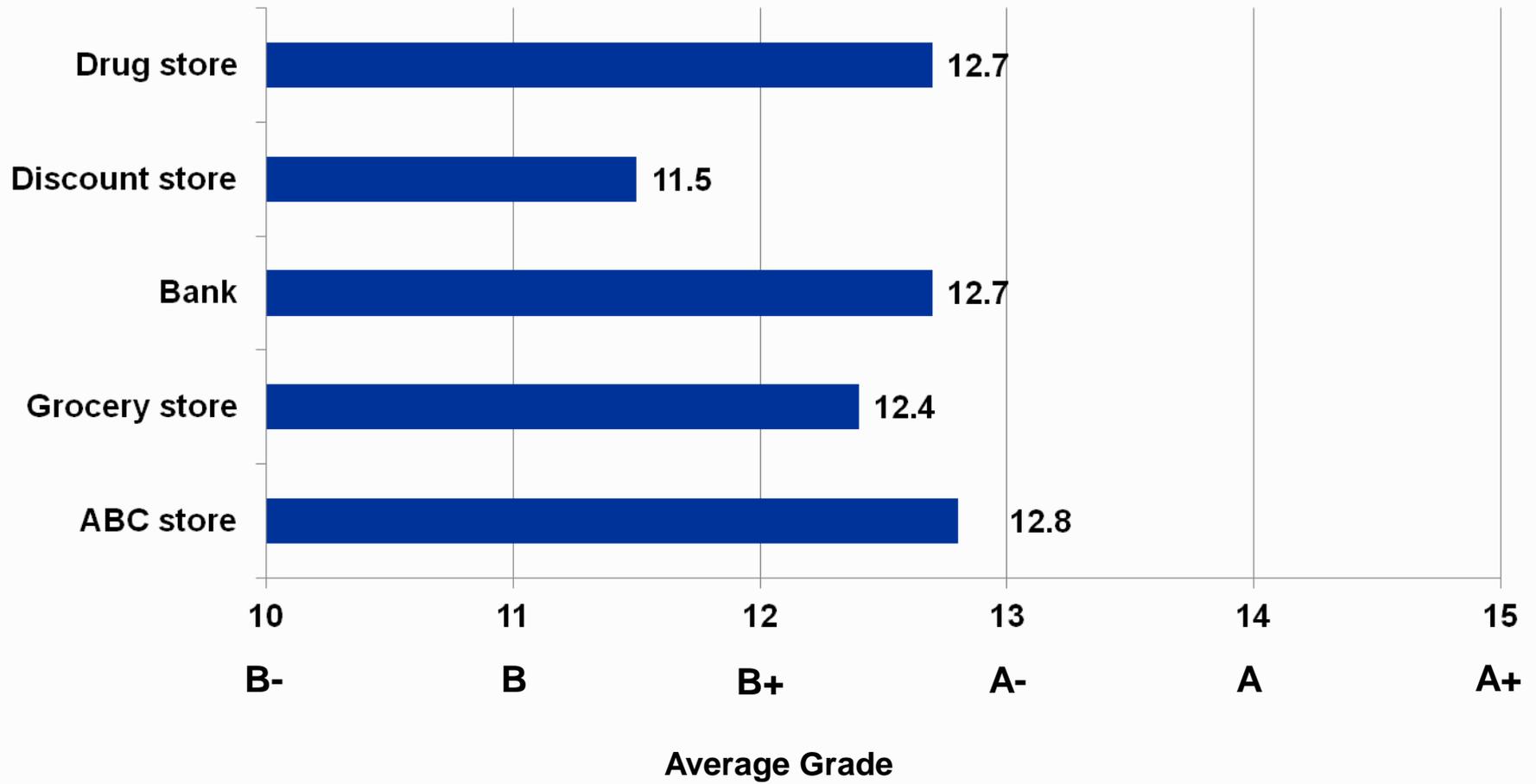
Some aspects could use improvement...

- *Mostly they are pretty good, but they do have some problems.*
- *The store is an older store and they haven't had any renovations and the parking like is on a side road...and the entrance is horrible...*
- *It's just a bland building.*
- *The hours could be a little better.*
- *Because the front of the store is not inviting.*



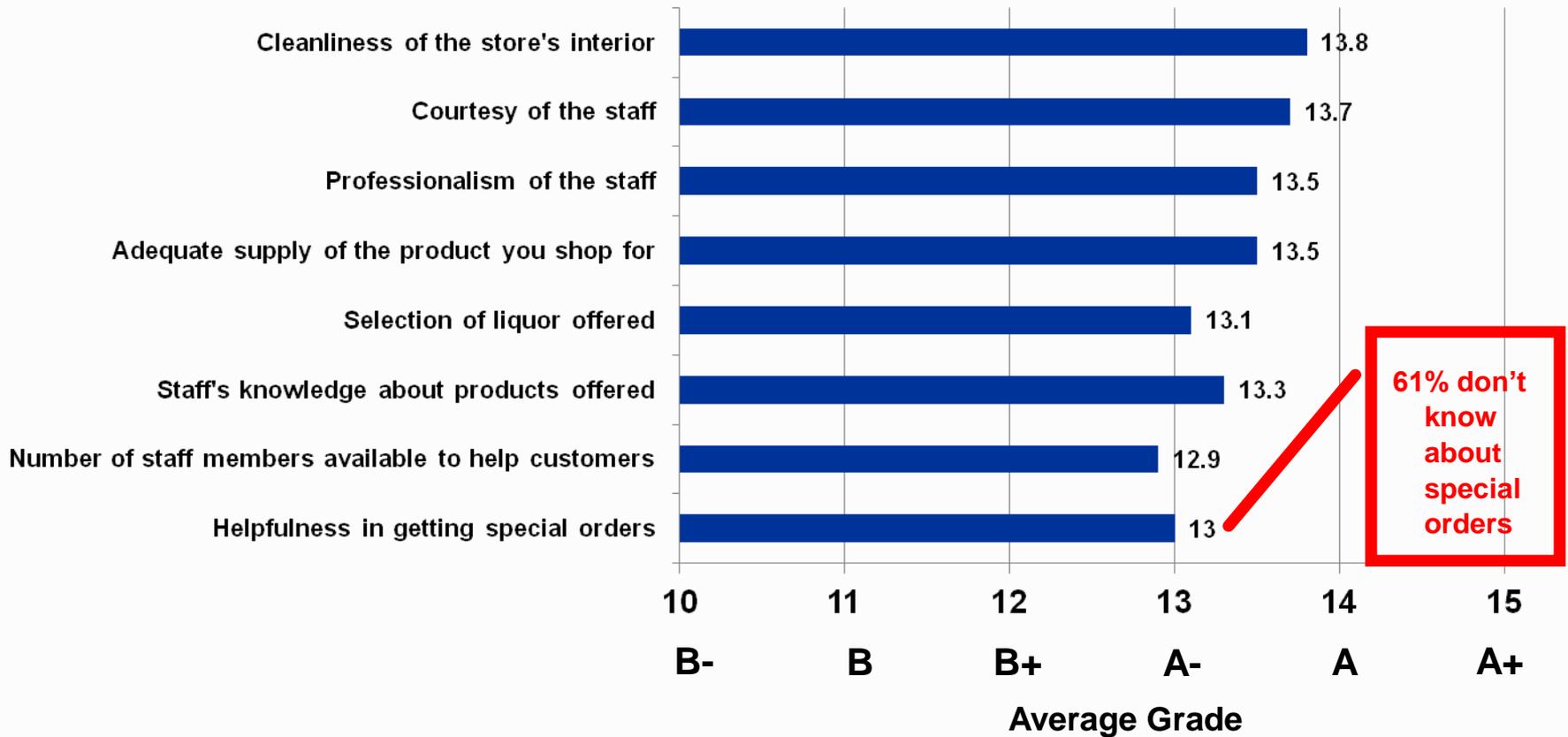
Customers graded the ABC store where they shop most often **HIGHER** than they graded their local drug store, discount store, bank, or grocery store.

What overall grade would you give to your local _____ ?



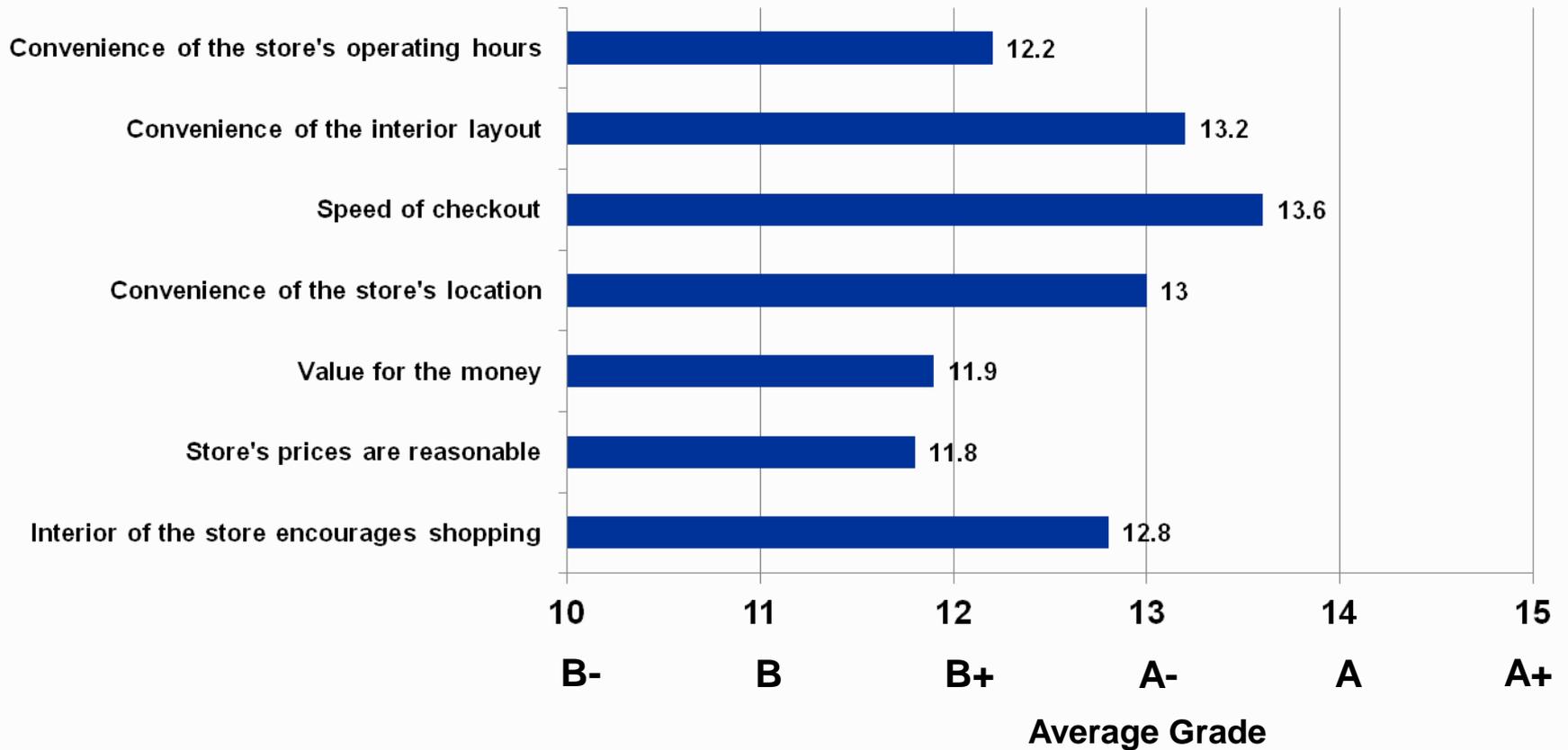
Customers gave their ABC store high grades for cleanliness of store's interior, staff courtesy, professionalism, product supply, and staff product knowledge.

What grade would you give the NC ABC liquor store you shop most often for ... ?



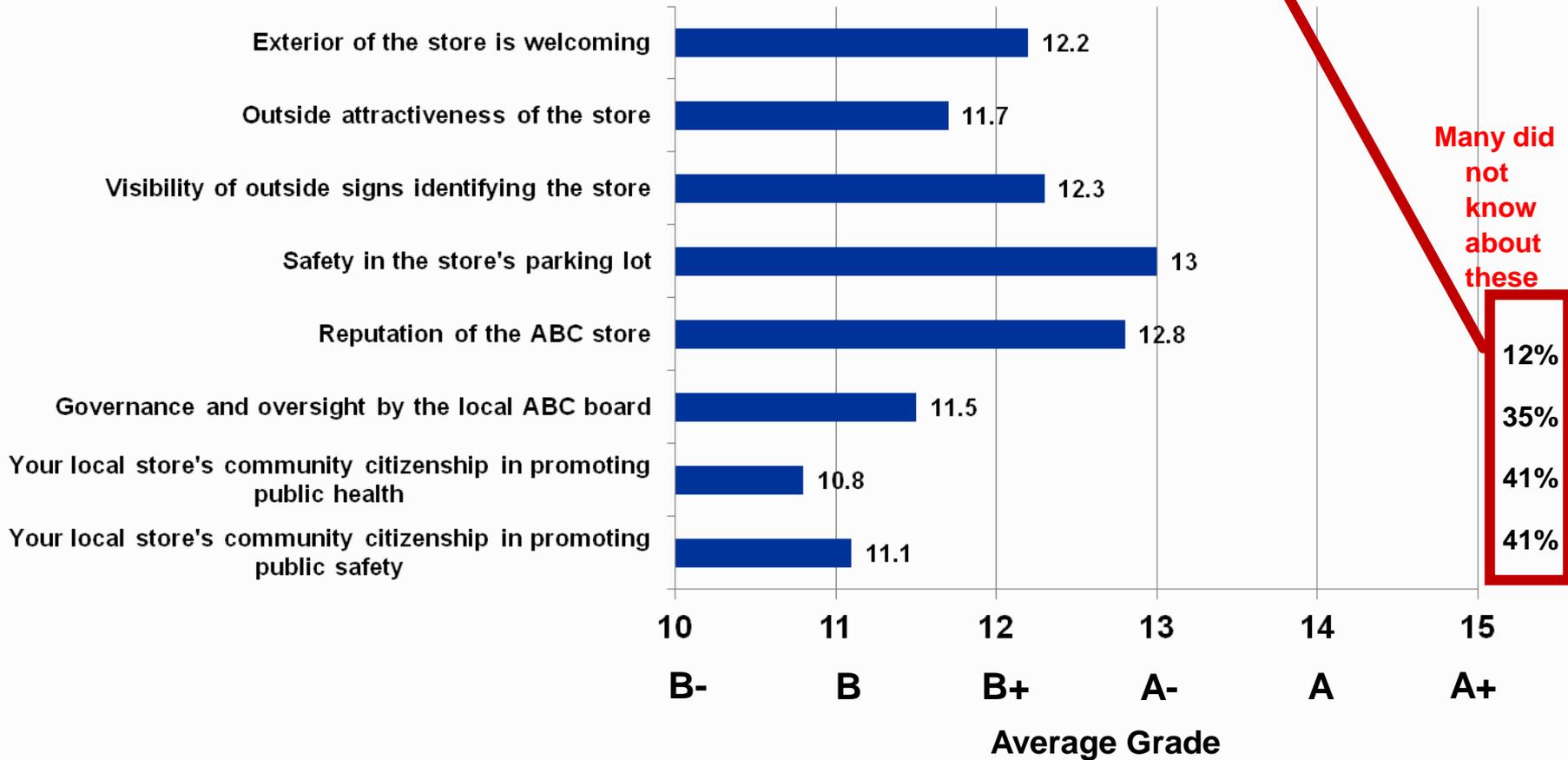
Customers graded the speed of checkout quite positive, but the store's prices and value for the money were graded lower.

What grade would you give the NC ABC liquor store you shop most often for ... ?



Safety in the parking lot and store reputation were positive; local ABC board and store's community citizenship grades were less positive and often unknown to customers.

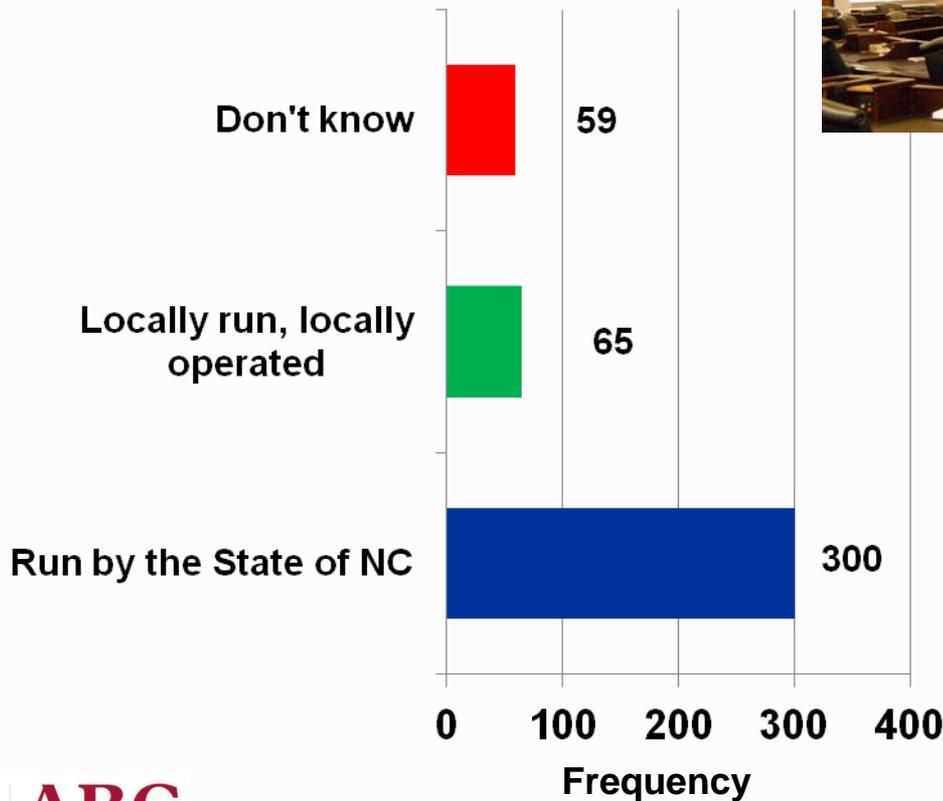
Using the same grading scale as before, how would you rate ... ?



71% of customers – 300 out of 424 – said ABC stores in North Carolina are run and operated by the State of North Carolina, not locally run and locally operated.

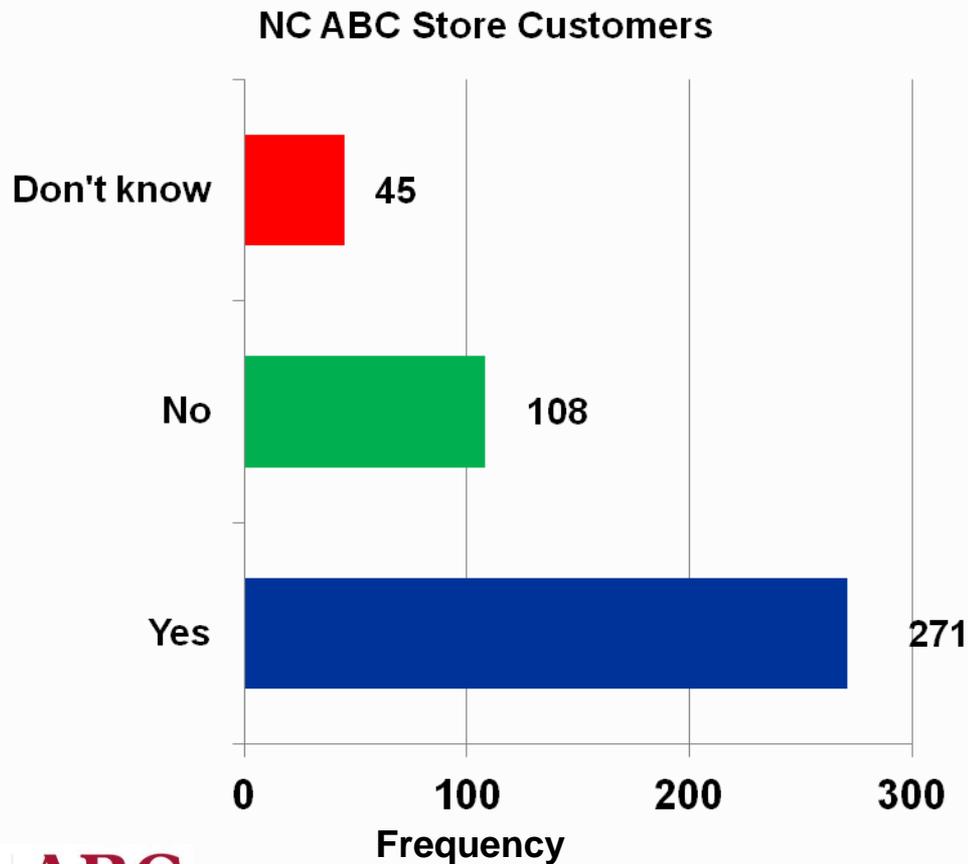
Which of the following statements is correct: ABC stores in North Carolina are run and operated by the State of North Carolina; or, ABC stores are locally run and locally operated?

NC ABC Store Customers



64% of customers said ABC stores should offer customers information about alcohol treatment resources; 25% said they should not offer such information.

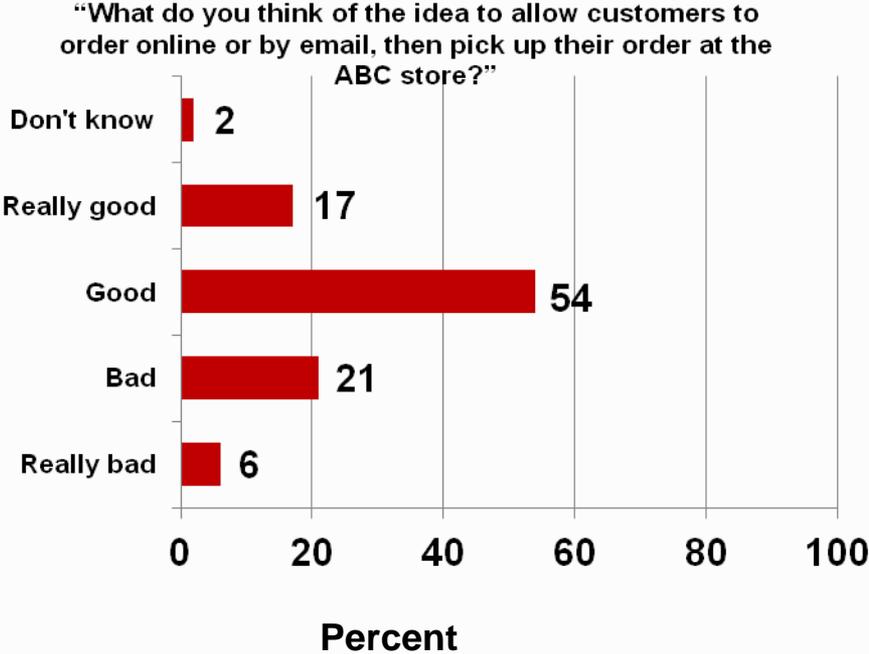
Should ABC stores offer customers information about alcohol treatment resources?



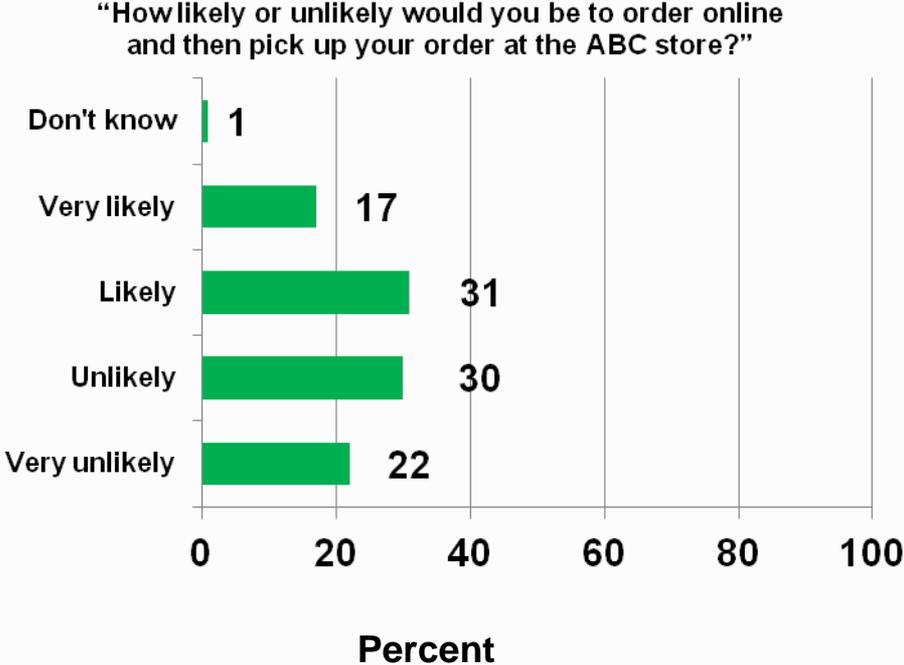
Other recommendations to improve customer service

71% of customers said allowing orders online or by email is a good idea and 48% said they would be likely to use these methods of ordering.

Good idea

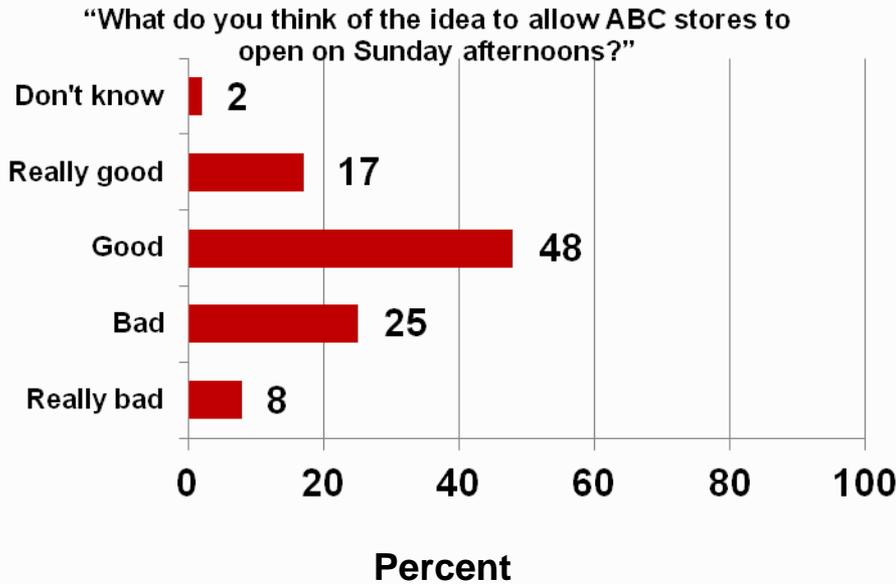


Likely to use service

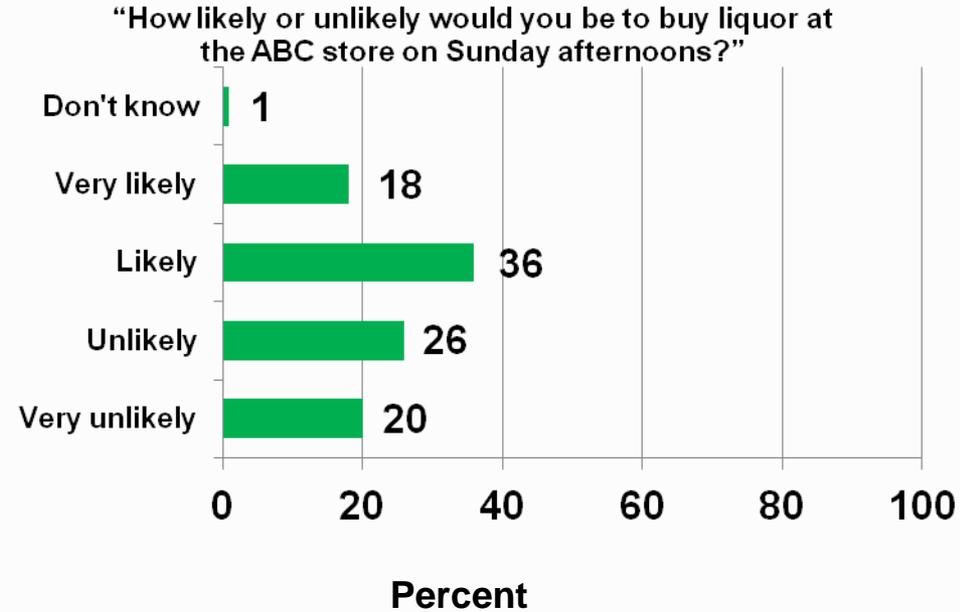


65% of customers support the idea of opening ABC stores on Sunday afternoons and 54% said they would likely buy liquor at the ABC store on Sunday afternoons.

Good idea

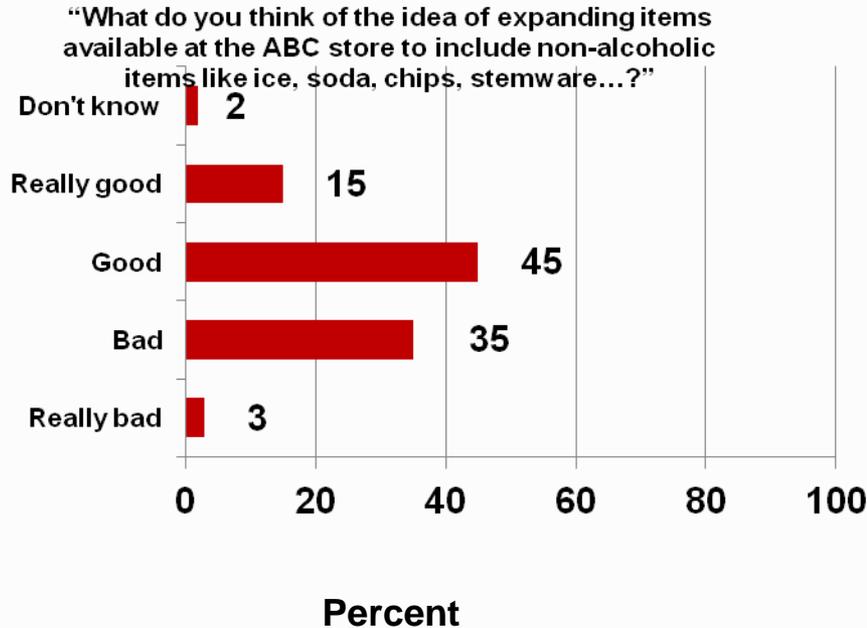


Likely to buy

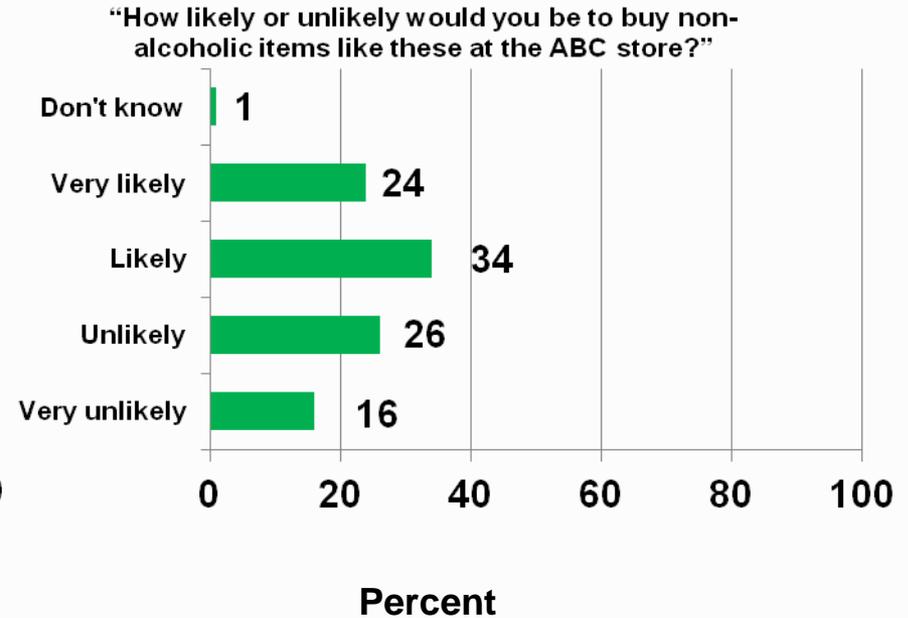


60% of customers said expanding non-alcoholic items at the ABC store is a good idea and 58% said they would likely buy these items at the ABC store.

Good idea

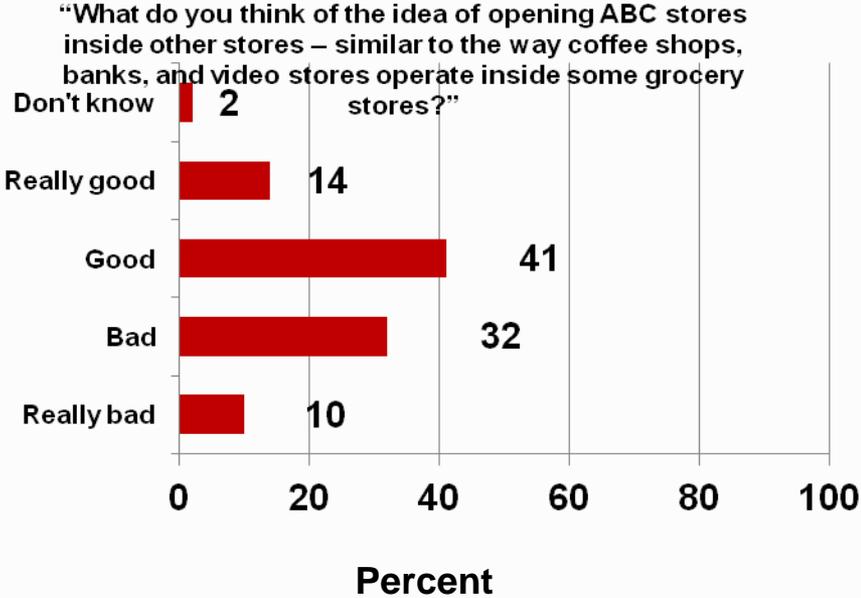


Likely to buy

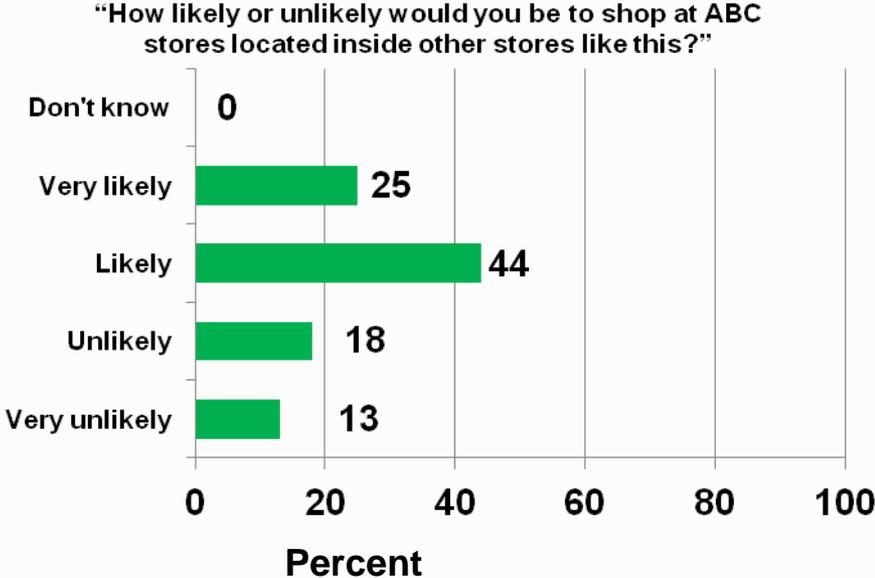


55% of customers said operating ABC stores inside other stores is a good idea and 69% said they would likely shop ABC stores located inside other stores like this.

Good idea

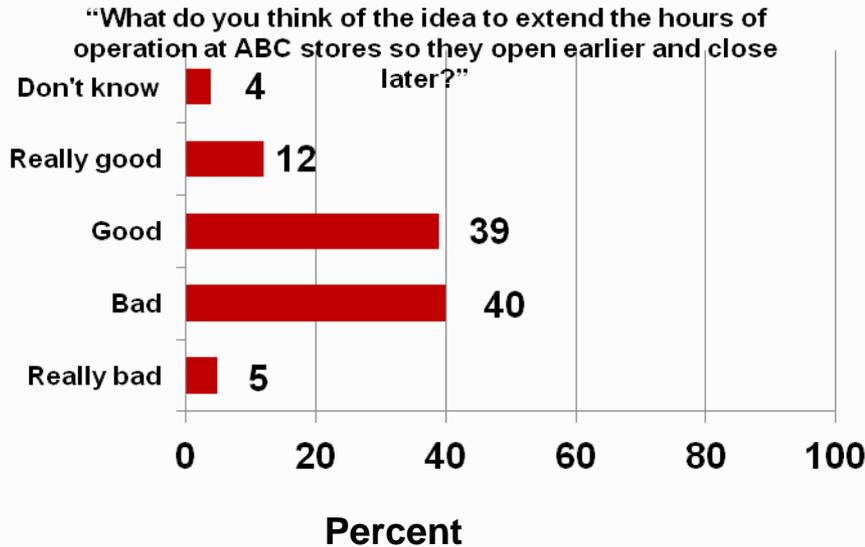


Likely to shop

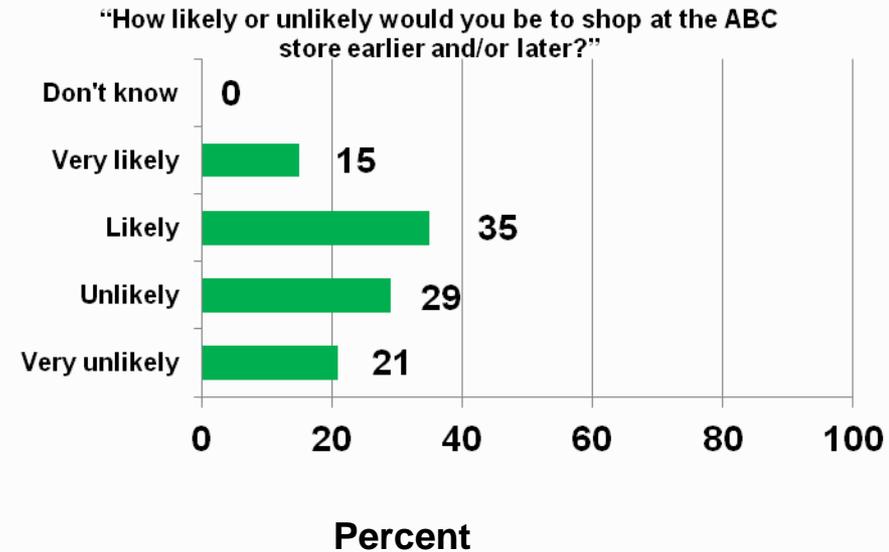


51% of customers said extending hours of operation at ABC stores is a good idea and 50% said they would likely shop at the ABC store during extended hours.

Good idea



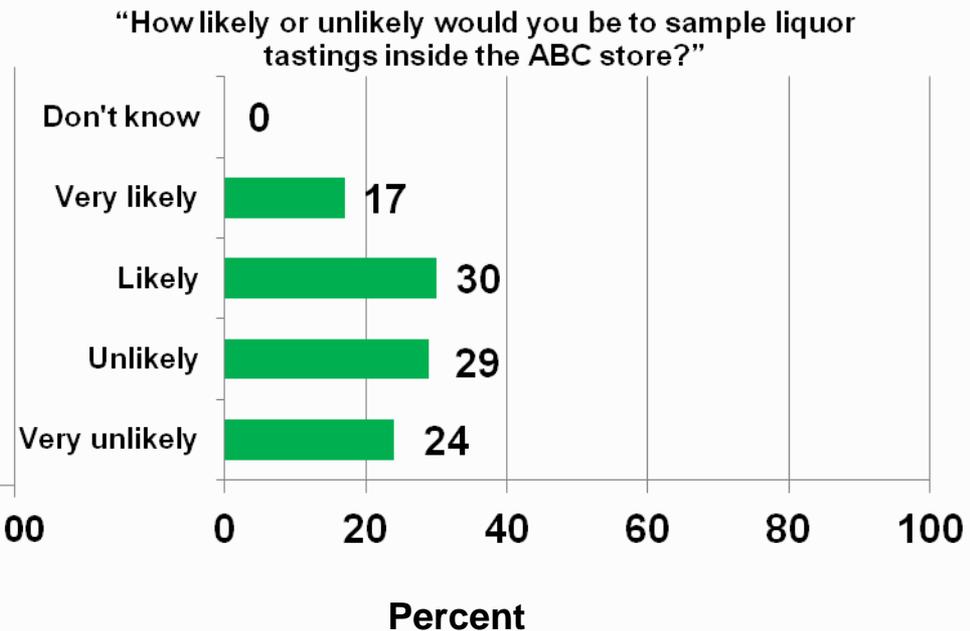
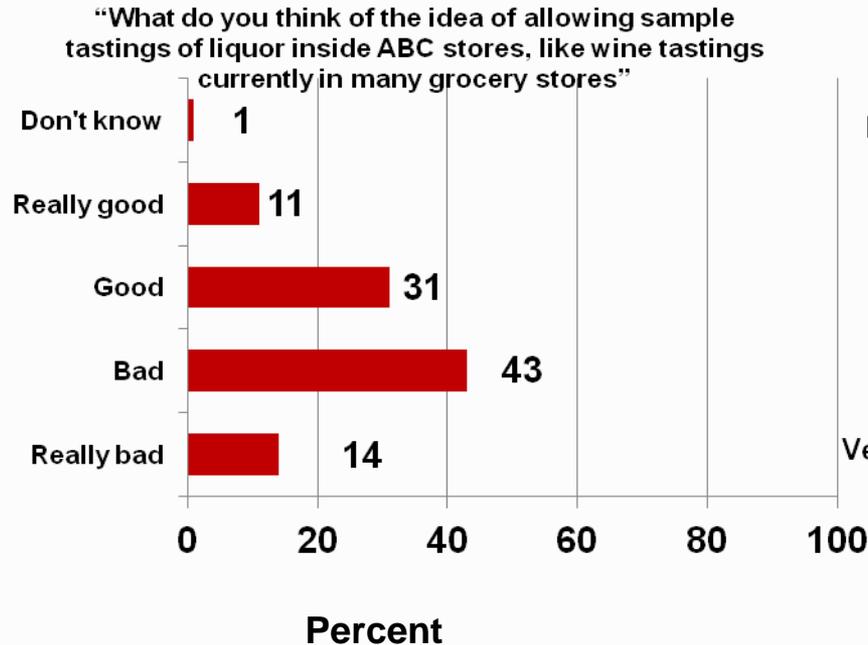
Likely to shop



42% of customers said allowing sample liquor tastings in ABC stores is a good idea and 47% said they would likely sample liquor tastings inside the ABC store.

Good idea

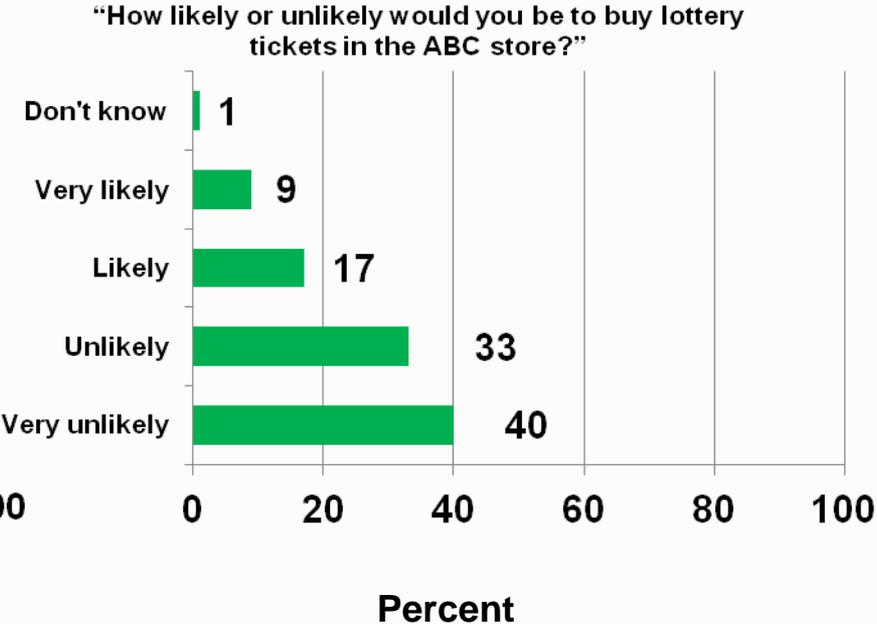
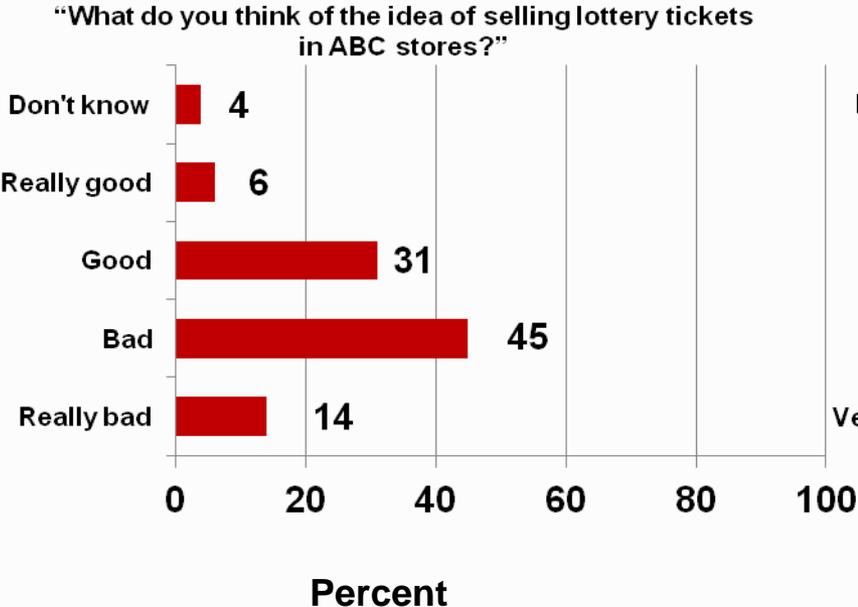
Likely to sample



37% of customers said selling lottery tickets in ABC stores is a good idea and 26% said they would be likely to buy lottery tickets in the ABC store.

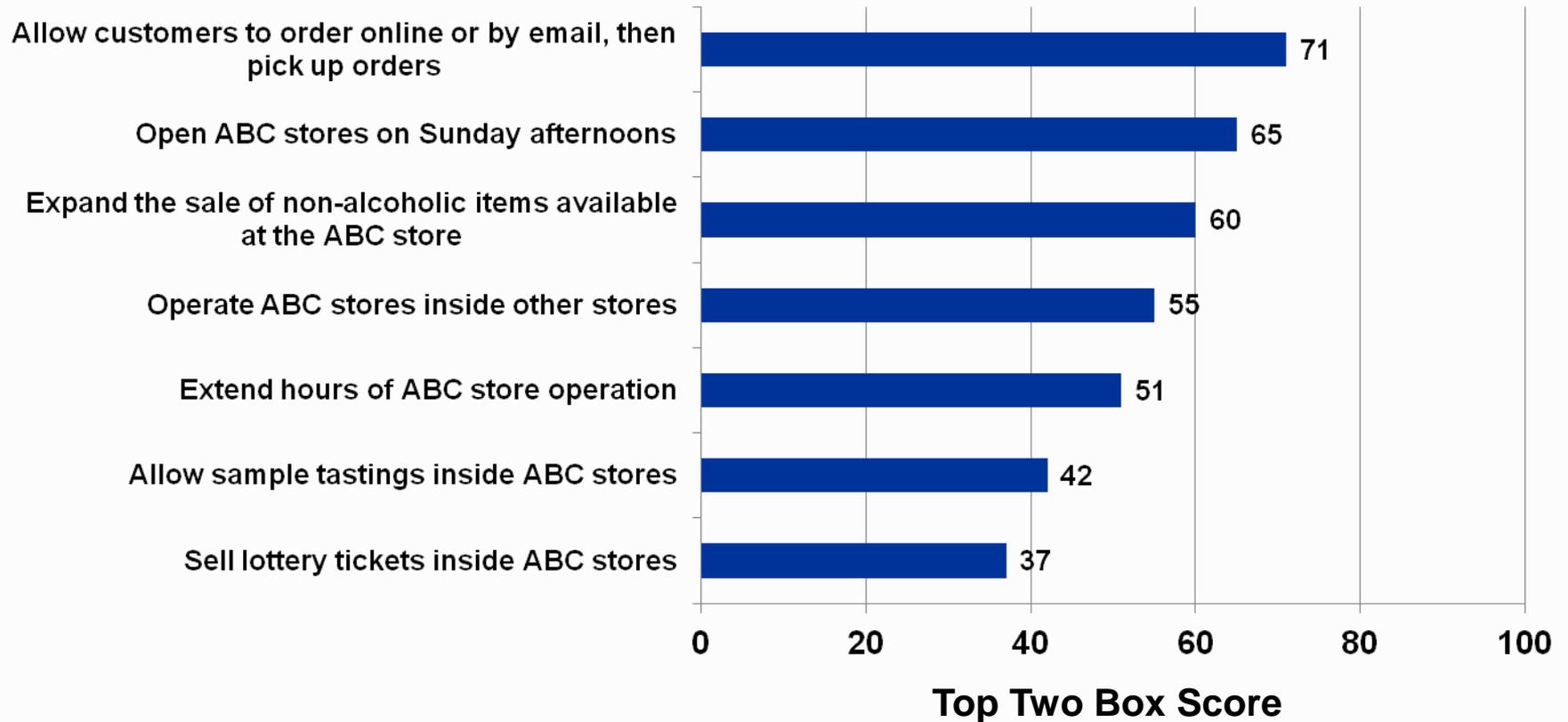
Good idea

Likely to buy



Retail customers support innovations in customer service at local ABC stores.

Do you think this is a really bad idea, a bad idea, a good idea, or a really good idea?



Percent who responded “good idea” or “really good idea”



How else did customers think the location, appearance, customer service, and convenience of shopping at this liquor store could be improved?

Most respondents said they did not know, or things were just fine.

Others suggested...

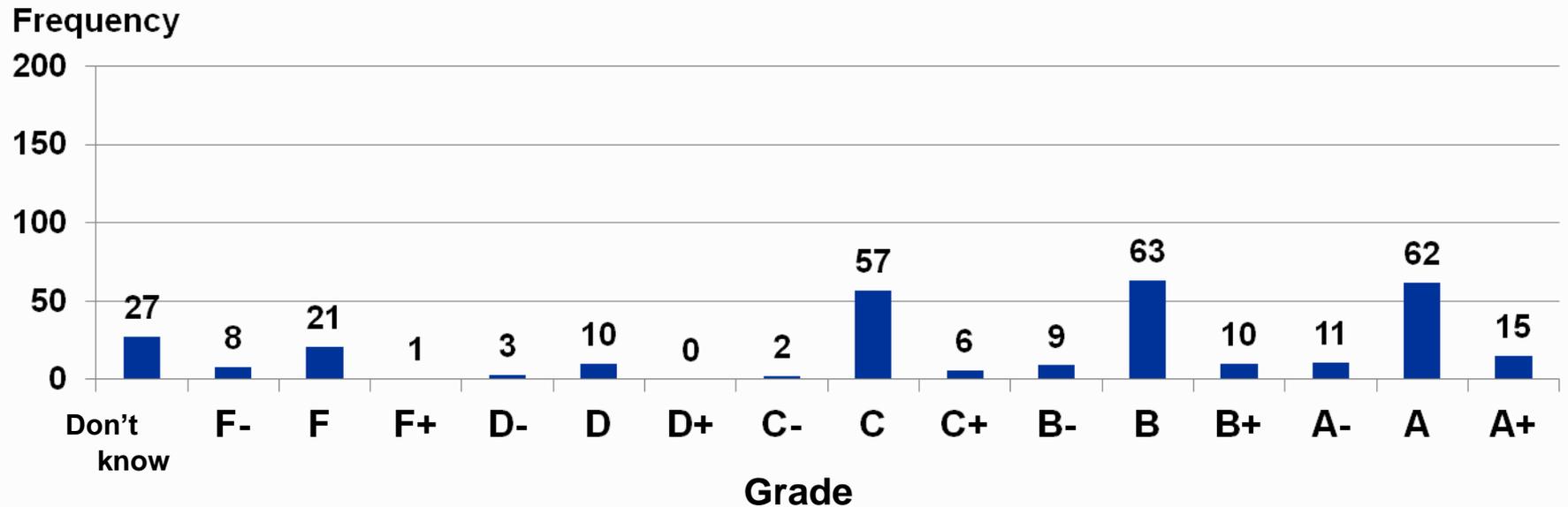
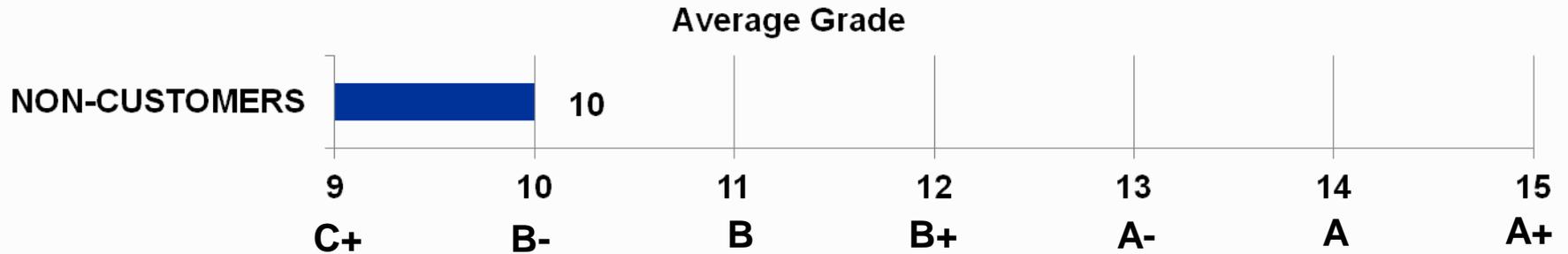
- Better parking
- Nicer, more inviting stores
- Longer hours
- Better outdoor lighting
- Open on Sundays
- Better signage



Non-customer results

Non-customers who know of an ABC store in their community graded the ABC store an average of B- overall.

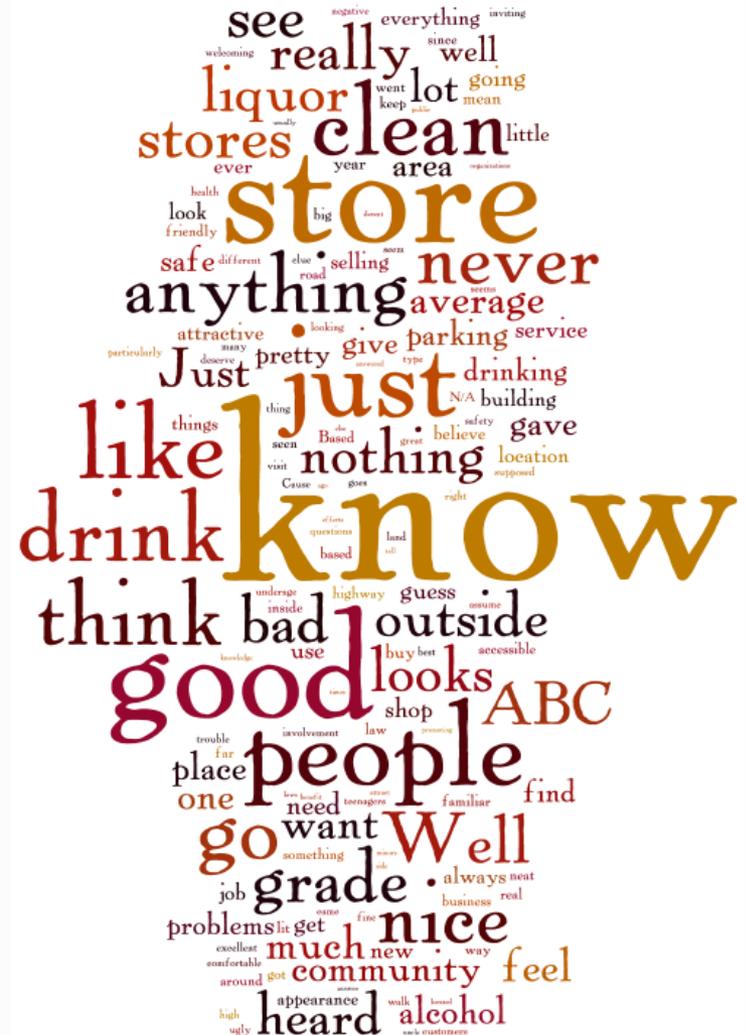
What overall summary grade would you give the NC ABC liquor store in your community?



Why did you give them that grade?

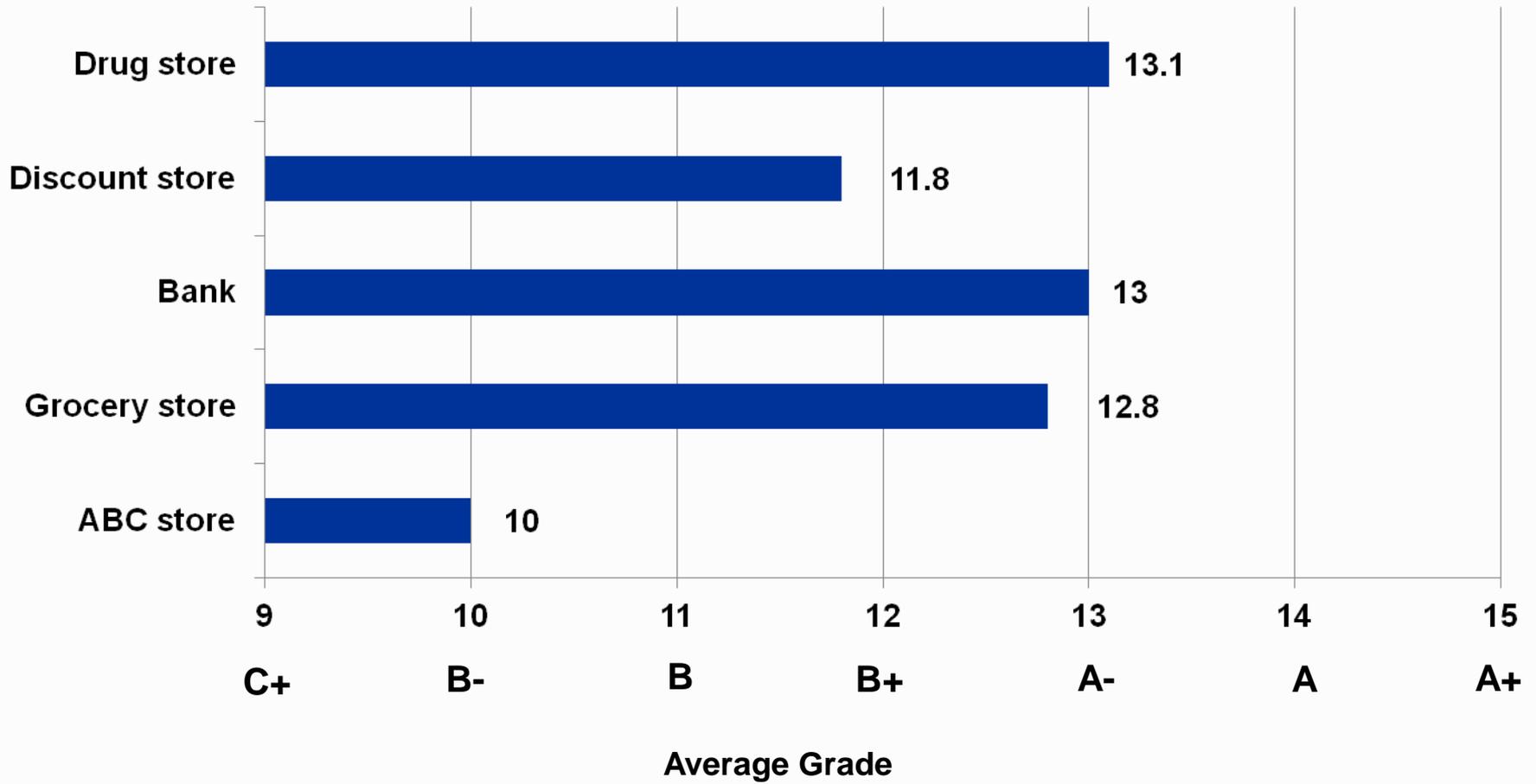
If they had an opinion, non-customers either loved or hated the way the ABC store in their community looked judging mostly from the outside appearance.

- *It's a pokey little ABC store.*
- *Just because the store looks nice and new.*
- *By looking at the outside, it looks like a decent place.*
- *It's basically a plain building with a bad reputation.*
- *It looks nice from the outside.*
- *Nice area and it looks good.*
- *I am just really going by the appearance on the outside of the store.*
- *Based on outside appearances – I've never been in.*
- *Based on when I ride by the store.*



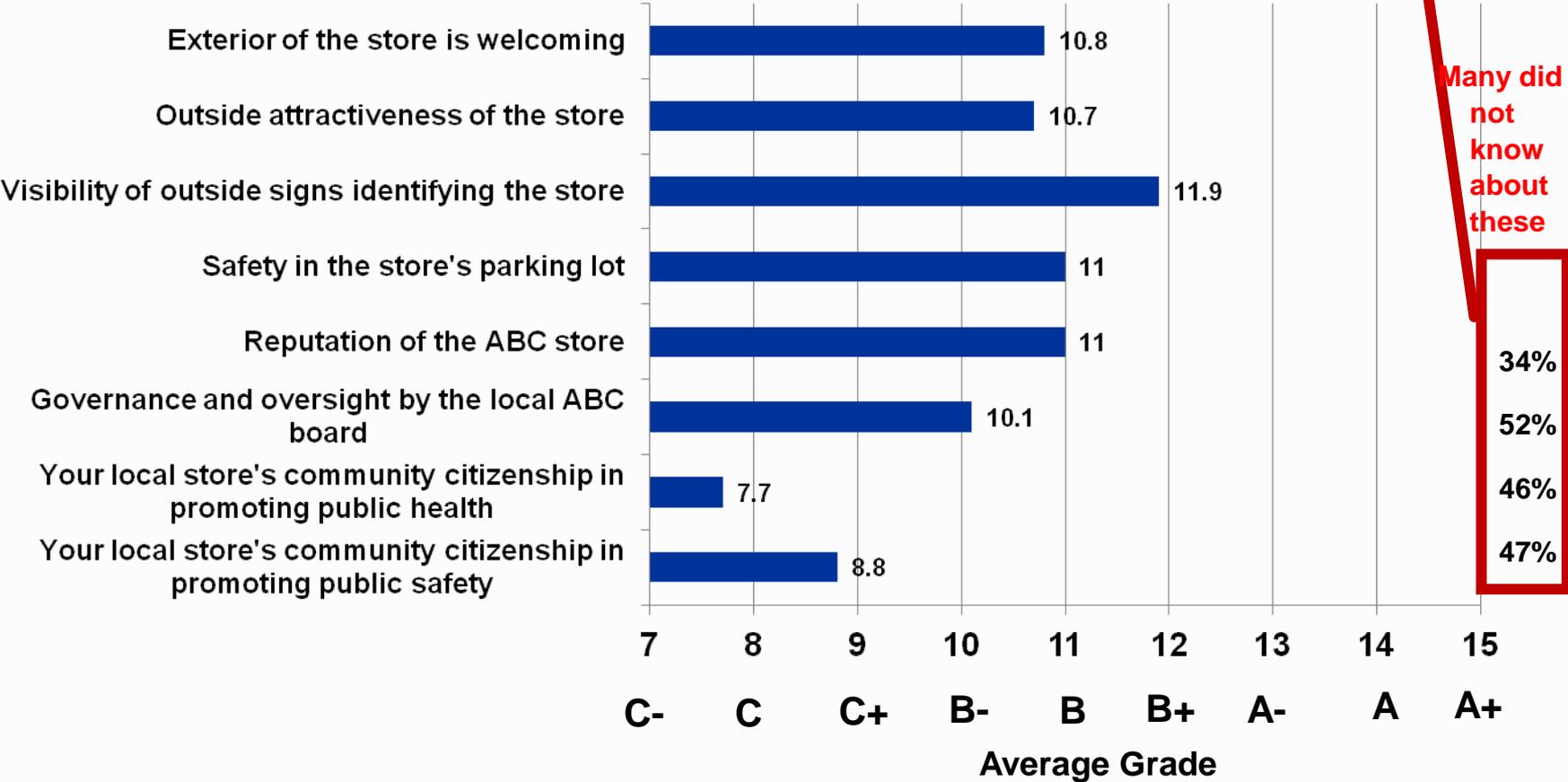
Non-customers graded the ABC store in their community LOWER than they graded their local drug store, discount store, bank, or grocery store.

“What overall grade would you give to your local _____?”



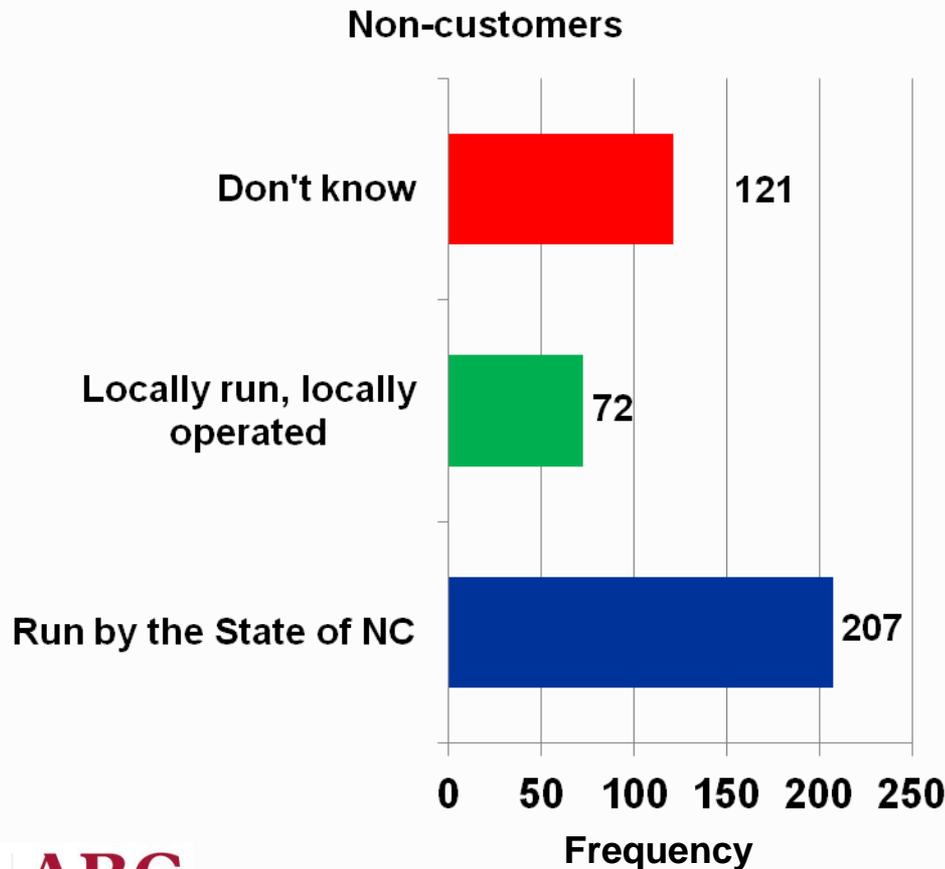
Non-customers graded outside of ABC stores positively; but the local ABC board's governance and store's community citizenship grades were not as high -- often unknown.

How would you grade ... ?



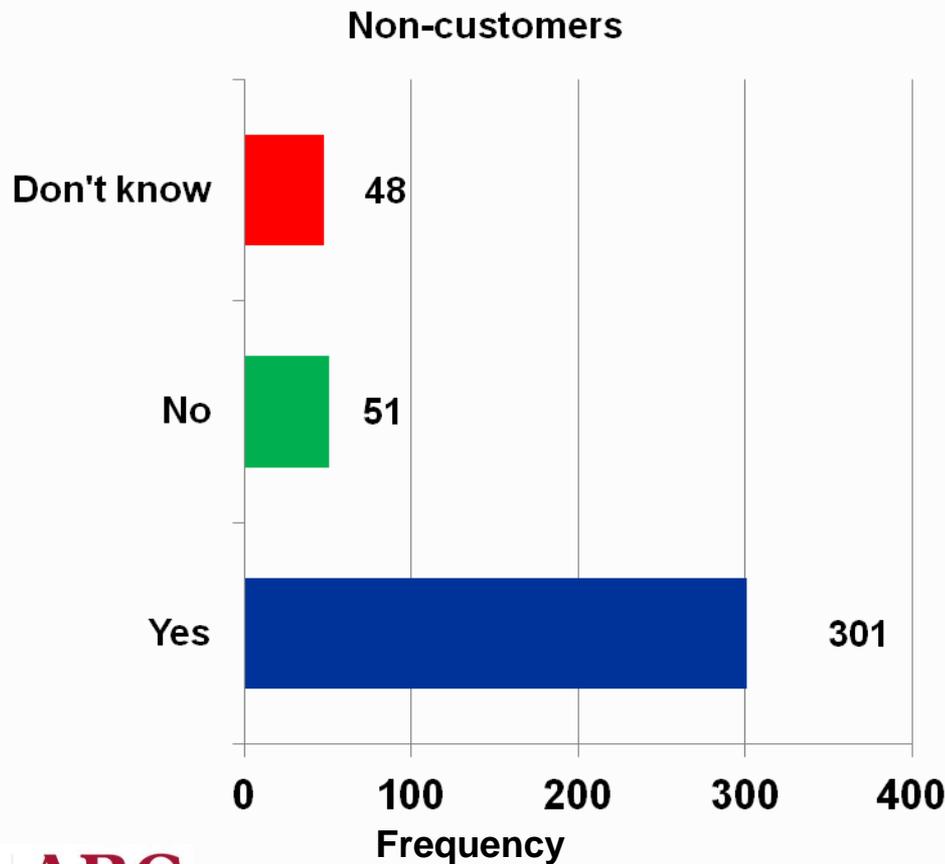
52% of non-customers said ABC stores are run and operated by the State of North Carolina; 18% said locally run; 30% did not know which statement was correct.

Which of the following statements is correct: ABC stores in North Carolina are run and operated by the State of North Carolina; or, ABC stores are locally run and locally operated?



75% of non-customers said ABC stores should offer customers information about alcohol treatment resources.

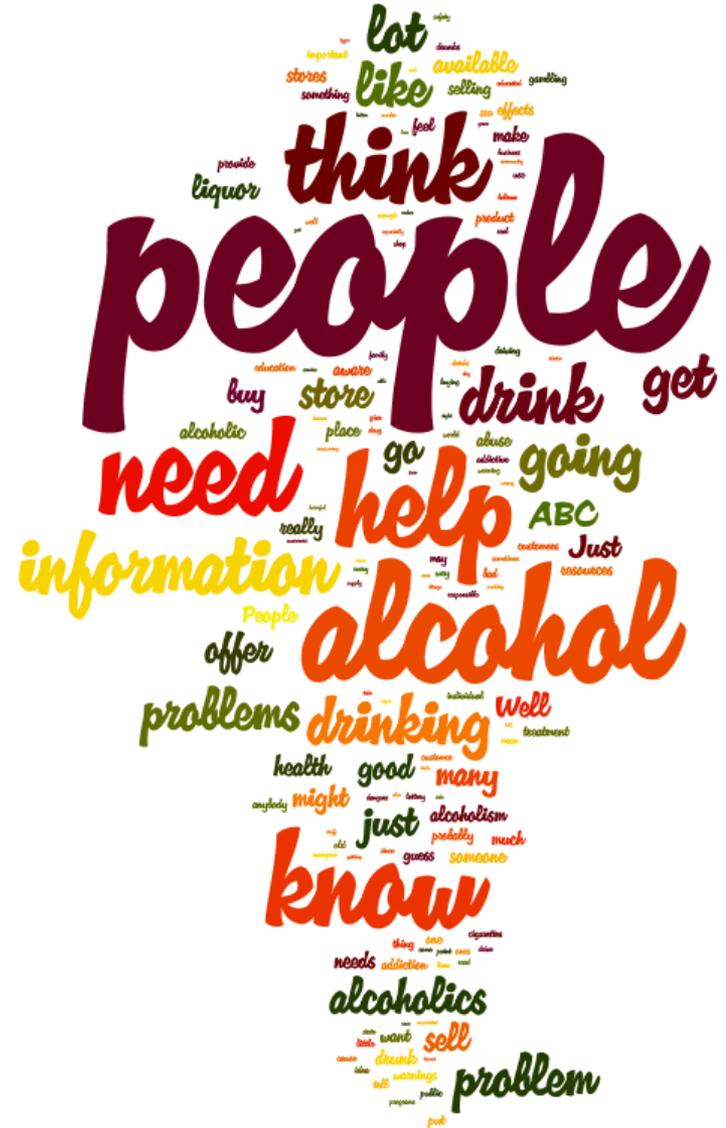
Should ABC stores offer customers information about alcohol treatment resources?



Why did most non-customers say that ABC stores should offer information about alcohol treatment?

Many said it was simple – ABC stores sell alcohol and therefore should offer this kind of literature.

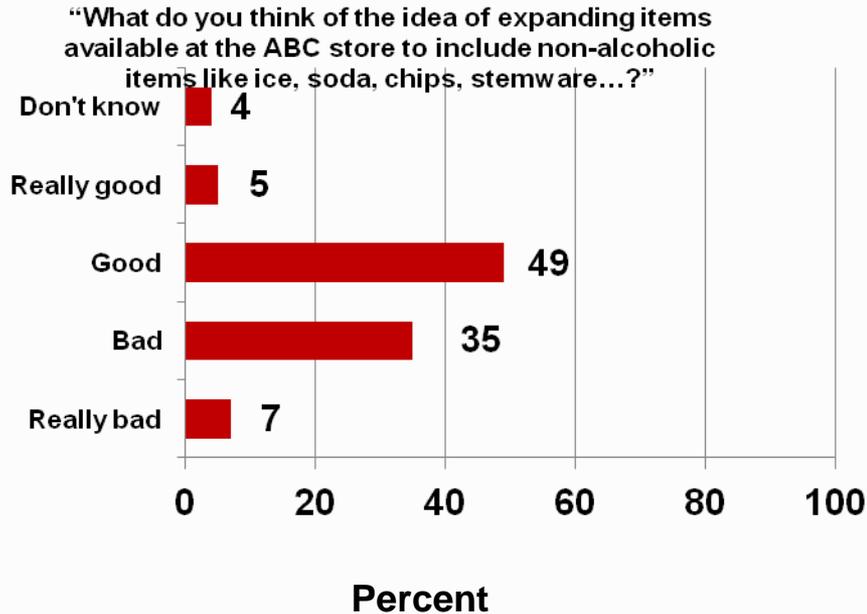
- *If they provide a problem, they should provide help.*
- *If they are going to serve alcohol then they should have information about how to get treatment.*
- *Because people need to be informed about the problems it can cause.*
- *Because they should know the damage it can do to you.*
- *They sell alcohol.*



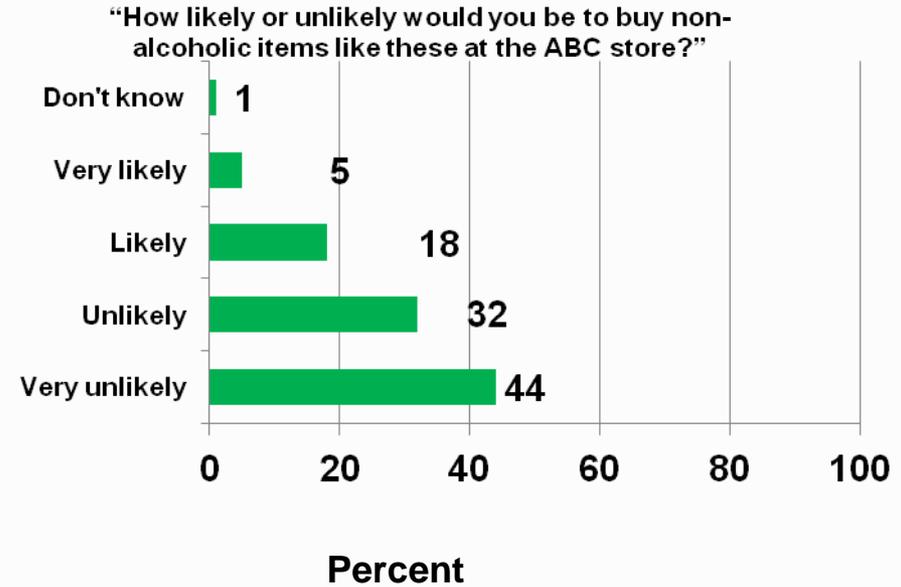
Non-customer opinions about other recommendations to improve customer service

54% of non-customers said expanding non-alcoholic items available at the ABC store is a good idea and 23% said they would likely buy these items there.

Good idea

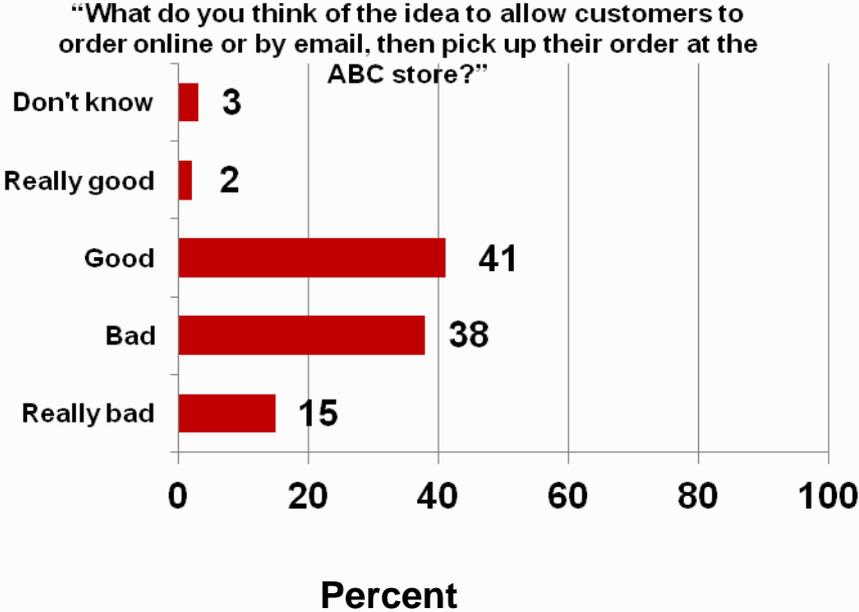


Likely to buy

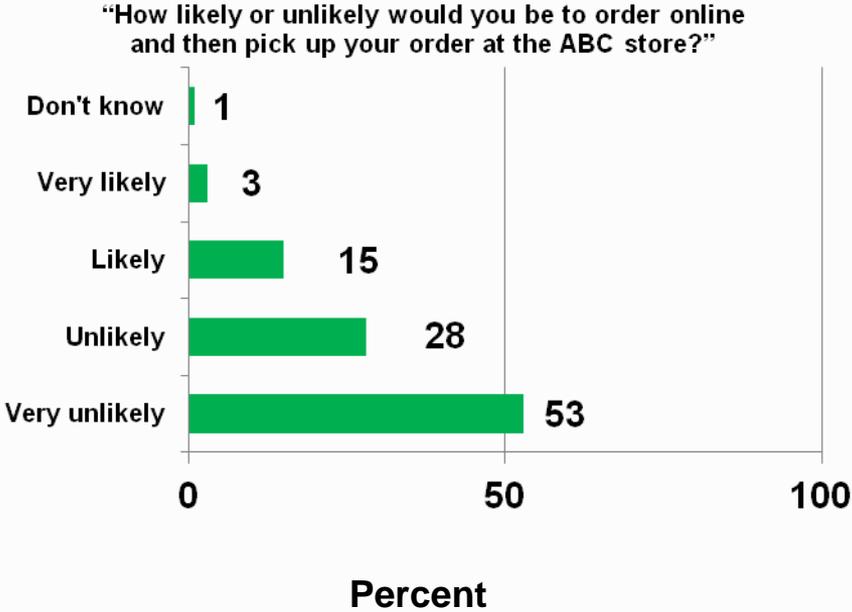


43% of non-customers said allowing ABC store orders online or by email then picking up at the ABC store is a good idea and 18% said they would be likely to use this.

Good idea



Likely to use



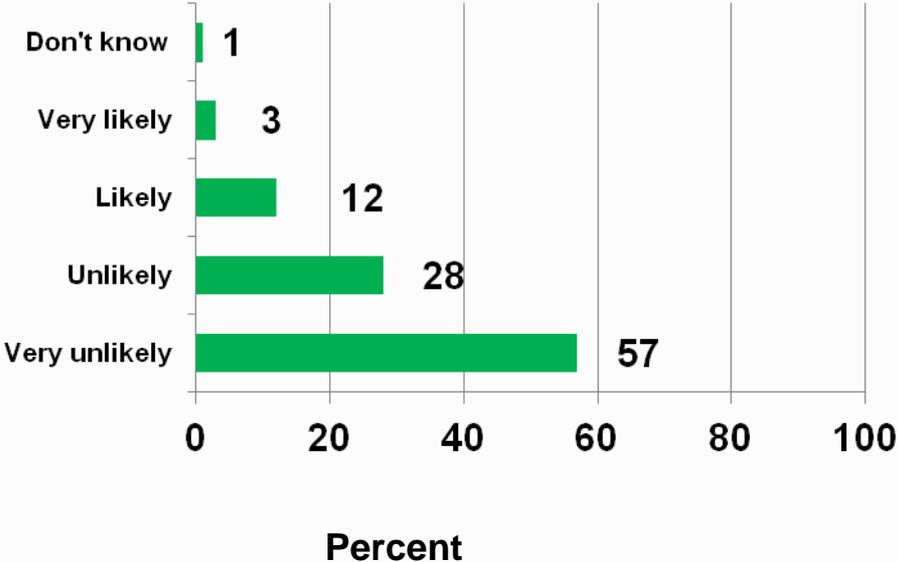
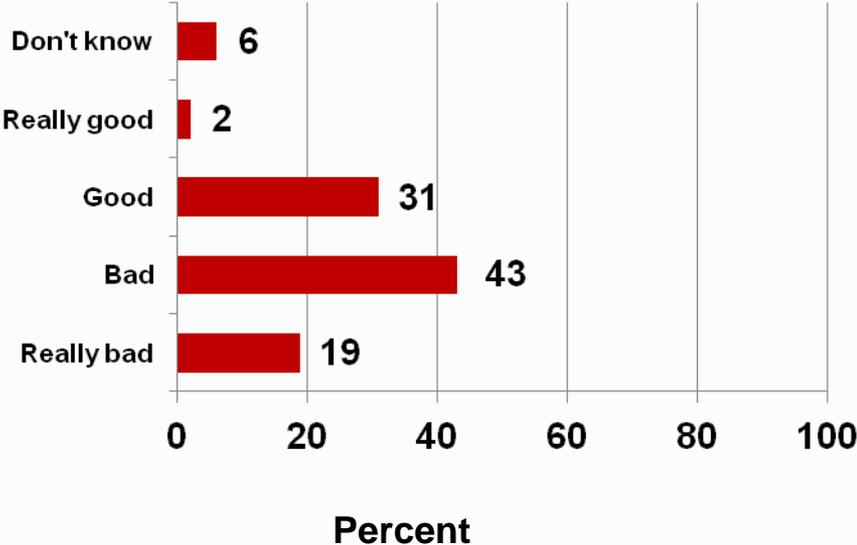
33% of non-customers said selling lottery tickets in ABC stores is a good idea and 15% said they would be likely to buy lottery tickets in the ABC store.

Good idea

Likely to buy

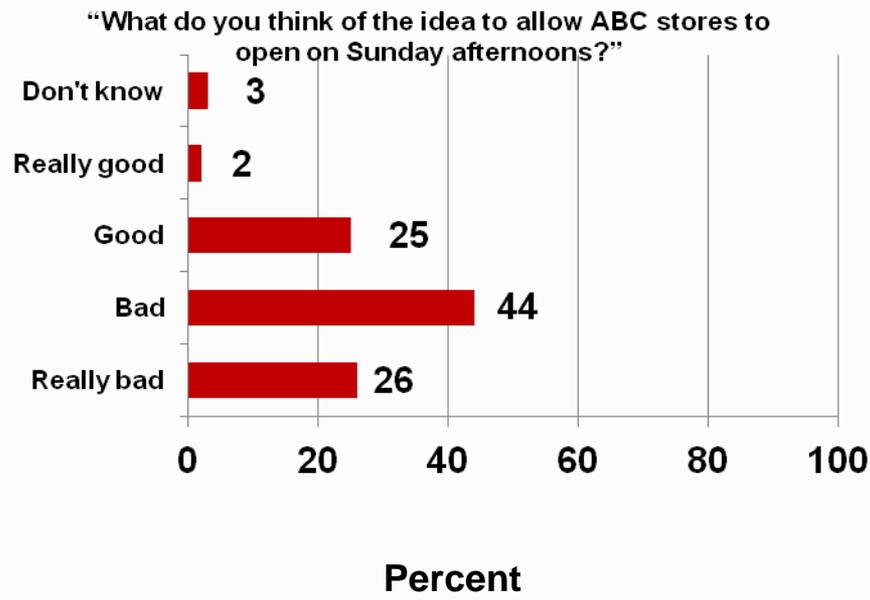
“What do you think of the idea of selling lottery tickets in ABC stores?”

“How likely or unlikely would you be to buy lottery tickets in the ABC store?”

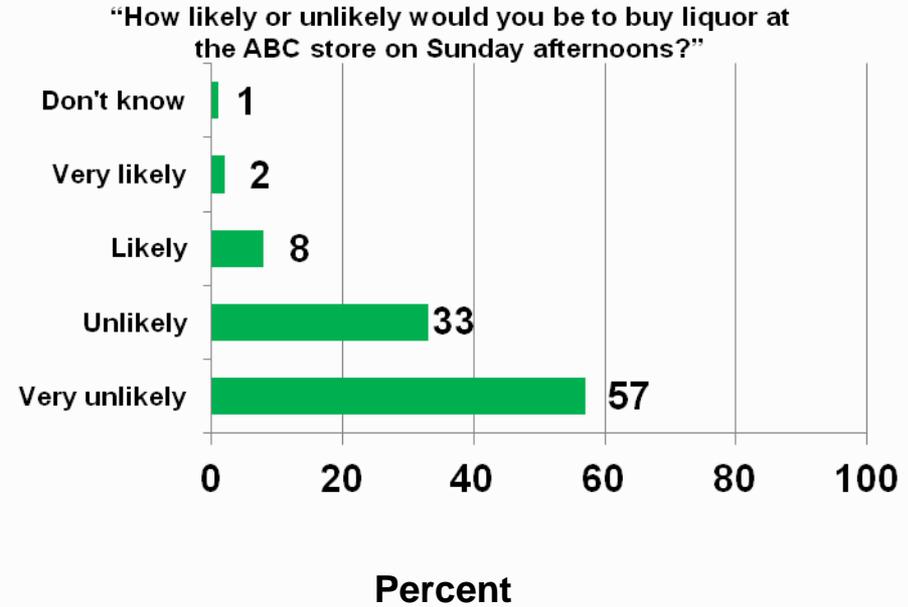


27% of non-customers said they support the idea of opening ABC stores on Sunday afternoons and 10% of non-customers said they would be likely to buy liquor on Sunday afternoons.

Good idea

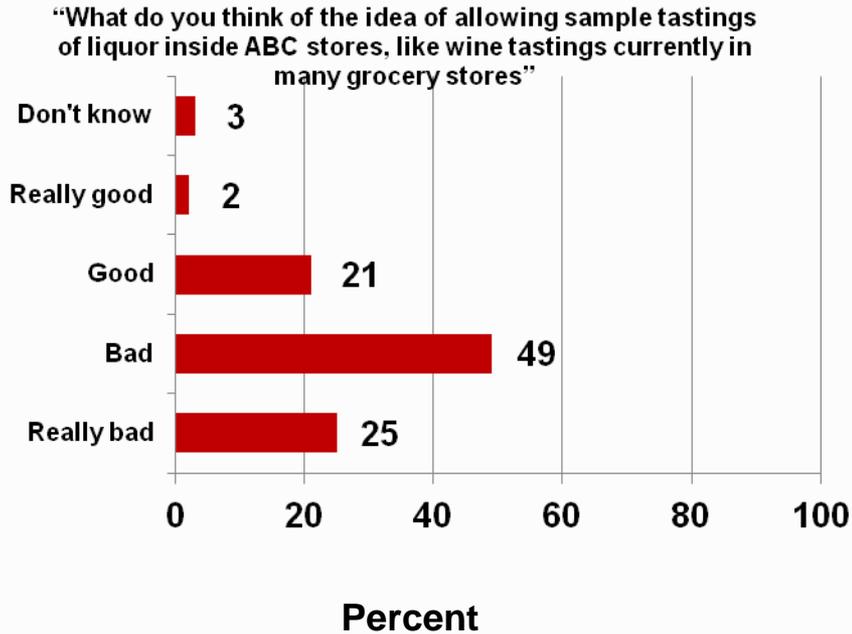


Likely to buy

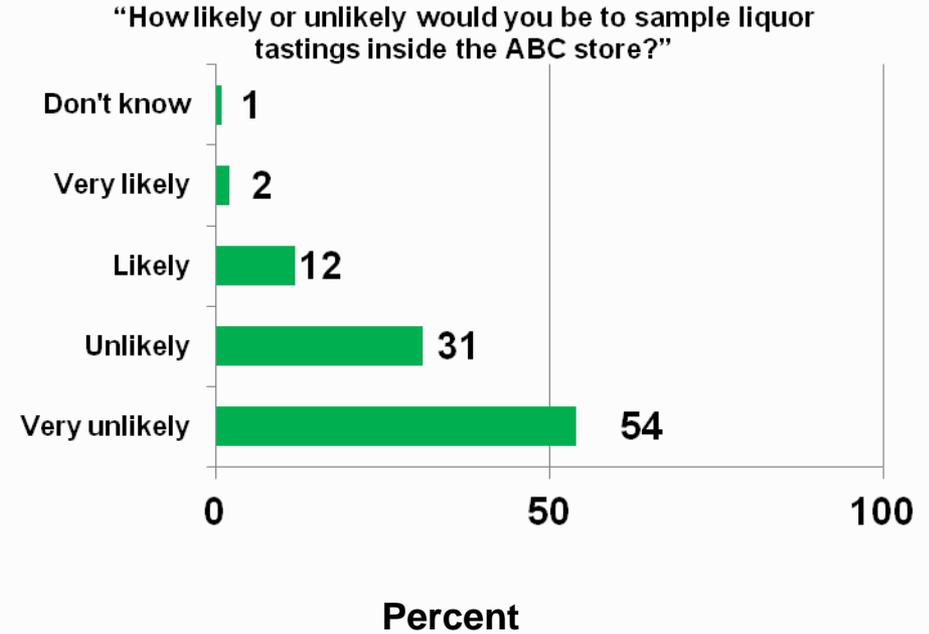


23% of non-customers said allowing liquor sample tastings in ABC stores is a good idea and 14% said they would likely sample inside the ABC store.

Good idea

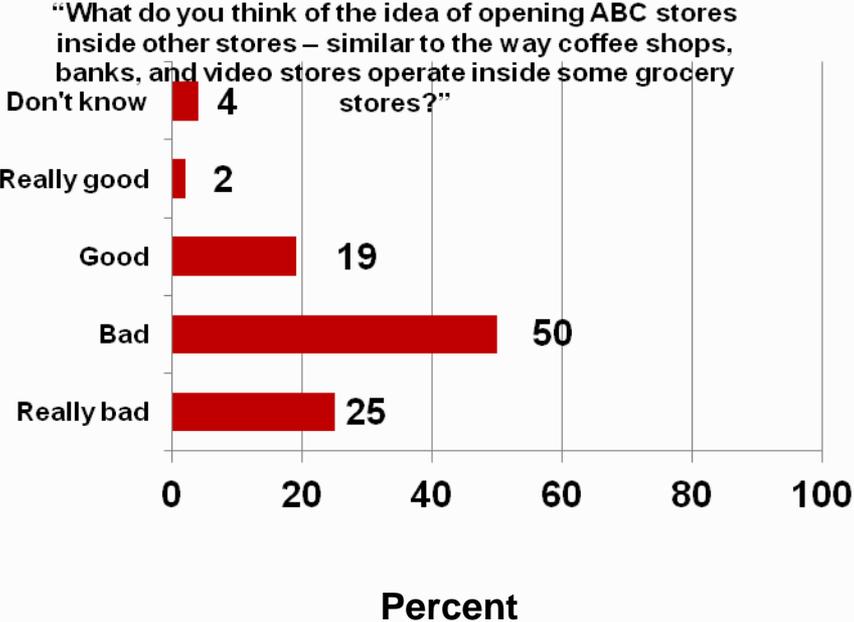


Likely to sample

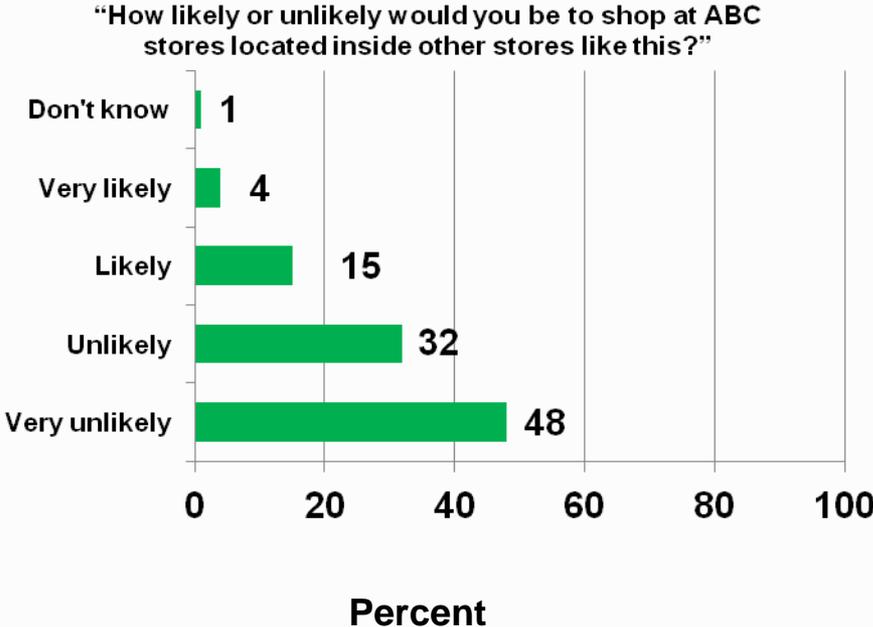


21% of non-customers said operating ABC stores inside other stores is a good idea and 19% said they would likely shop at such ABC stores.

Good idea

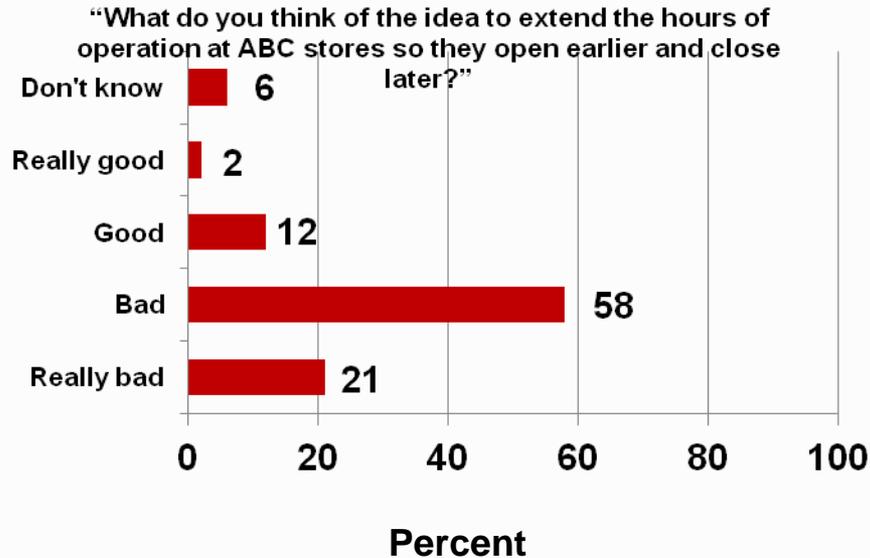


Likely to shop

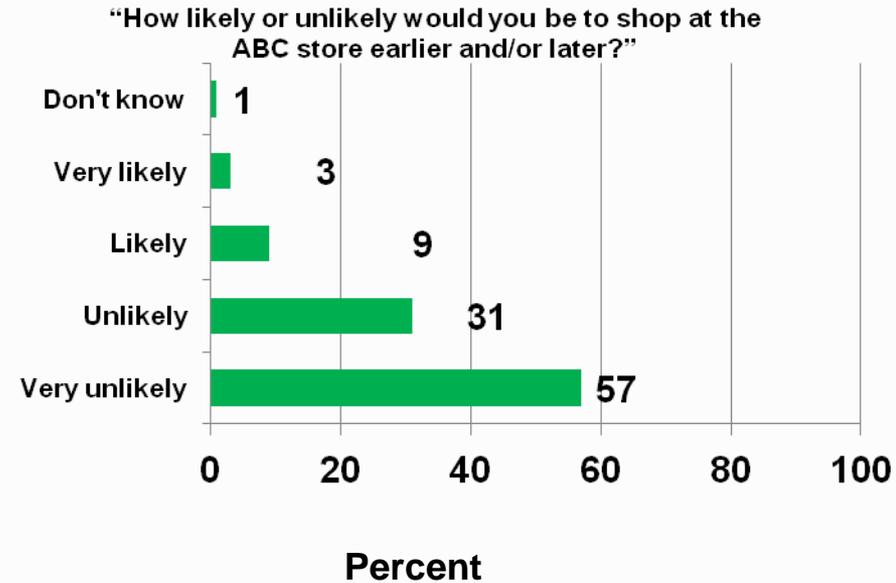


14% of non-customers said extending hours of operation at ABC stores to open earlier and close later is a good idea and 12% said they would likely shop those hours.

Good idea



Likely to shop



Summary of non-customer results.

Non-customers gave particularly high grades to:

- Visibility of outside signs identifying the local ABC store
- Safety in the store's parking lot
- Reputation of the ABC store

Non-customers gave lower grades to:

- Governance and oversight by local ABC board
- Local ABC store's community citizenship in promoting public health and public safety



Almost half of non-customers did not know anything about governance and oversight by the local ABC board or the local ABC store's community citizenship in promoting public health and public safety

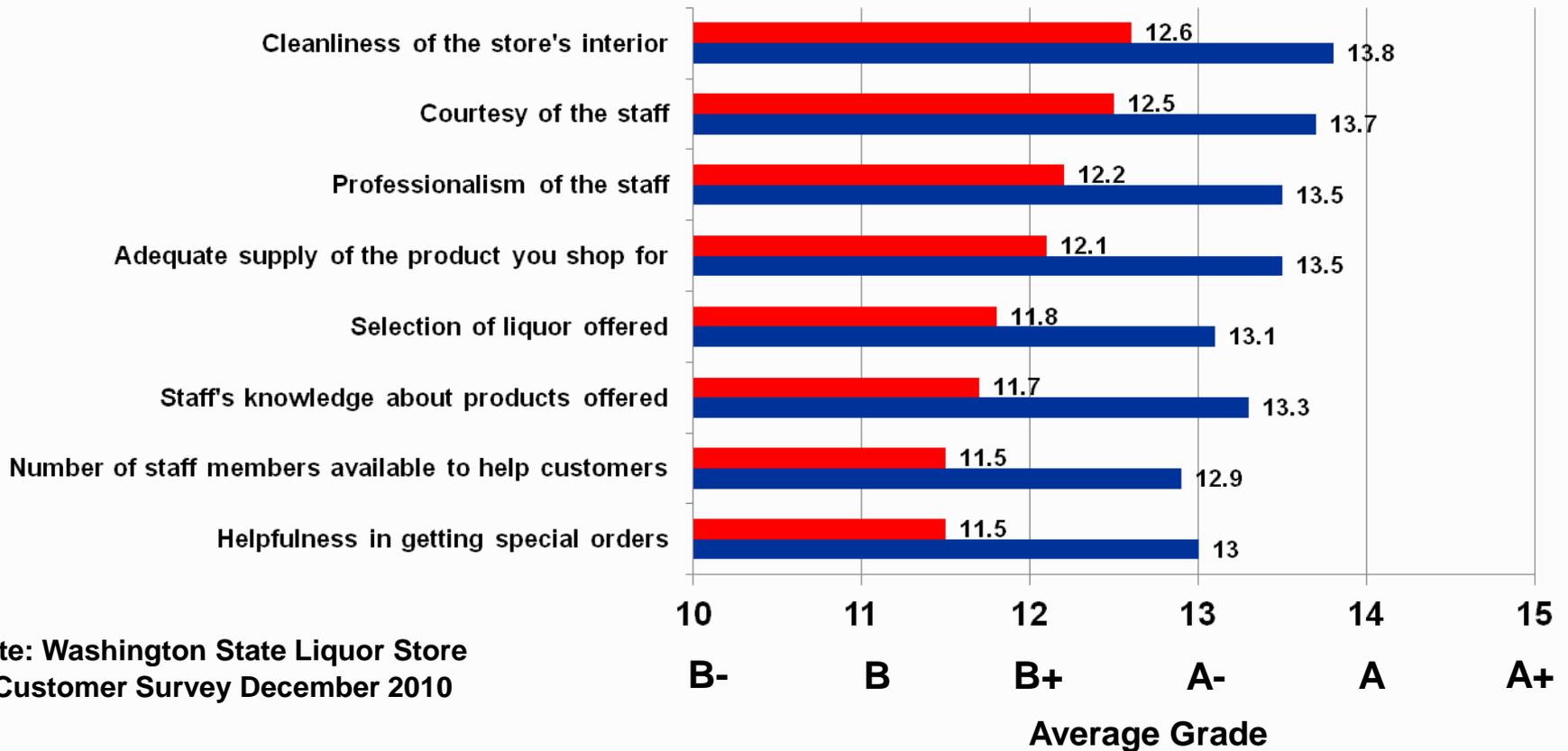
Non-customers graded the ABC store in their community "B-" substantially LOWER overall than they graded their local drug store, discount store, bank, or grocery store

Benchmarking against the 2010 Washington State survey

North Carolina customers consistently gave their ABC store and staff higher grades in 2011 than did Washington State customers in 2010.

Washington State Customers **North Carolina Customers**

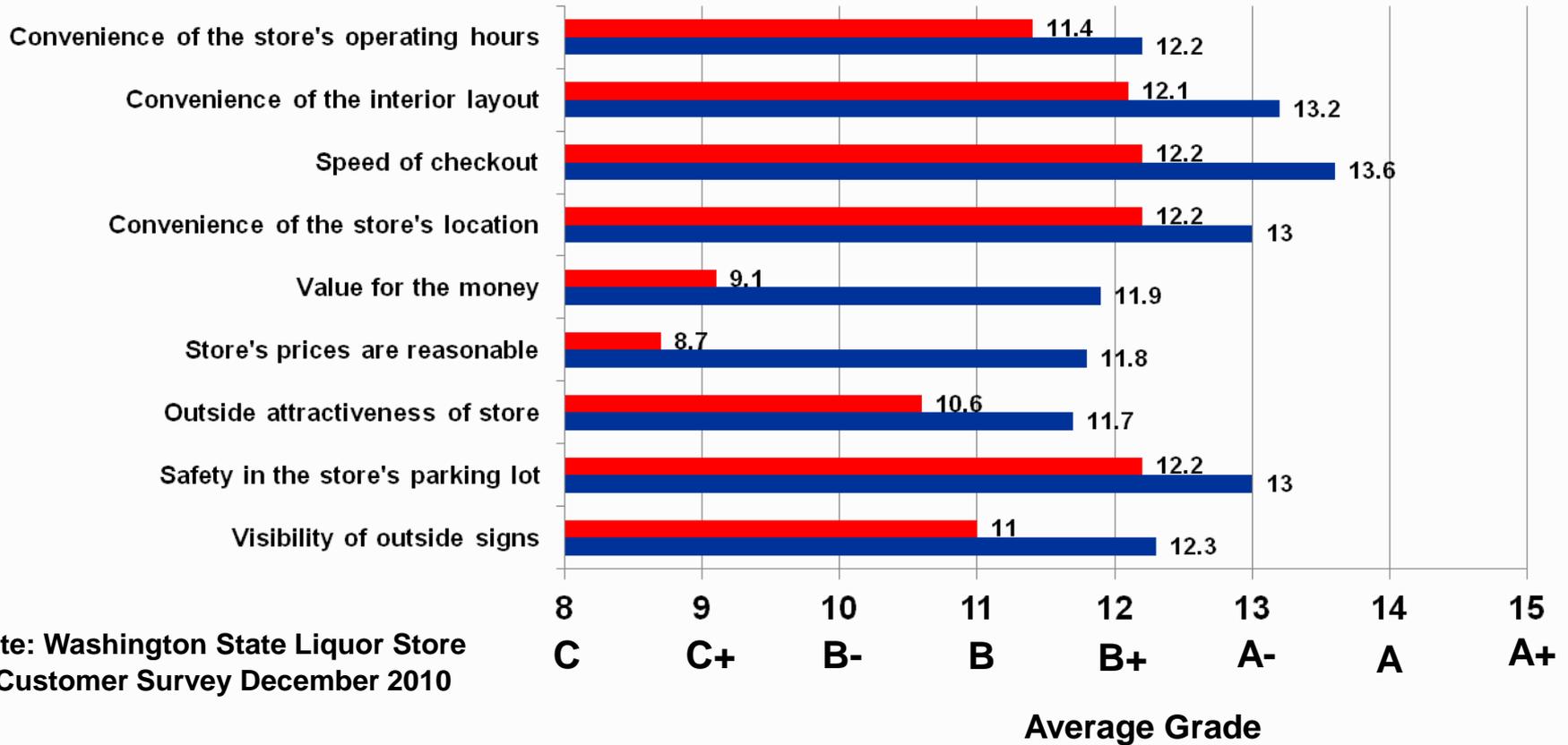
What grade would you give the liquor store you shop most often for ... ?



North Carolina customers consistently gave their ABC store higher grades in 2011 than did Washington State liquor store customers in 2010.

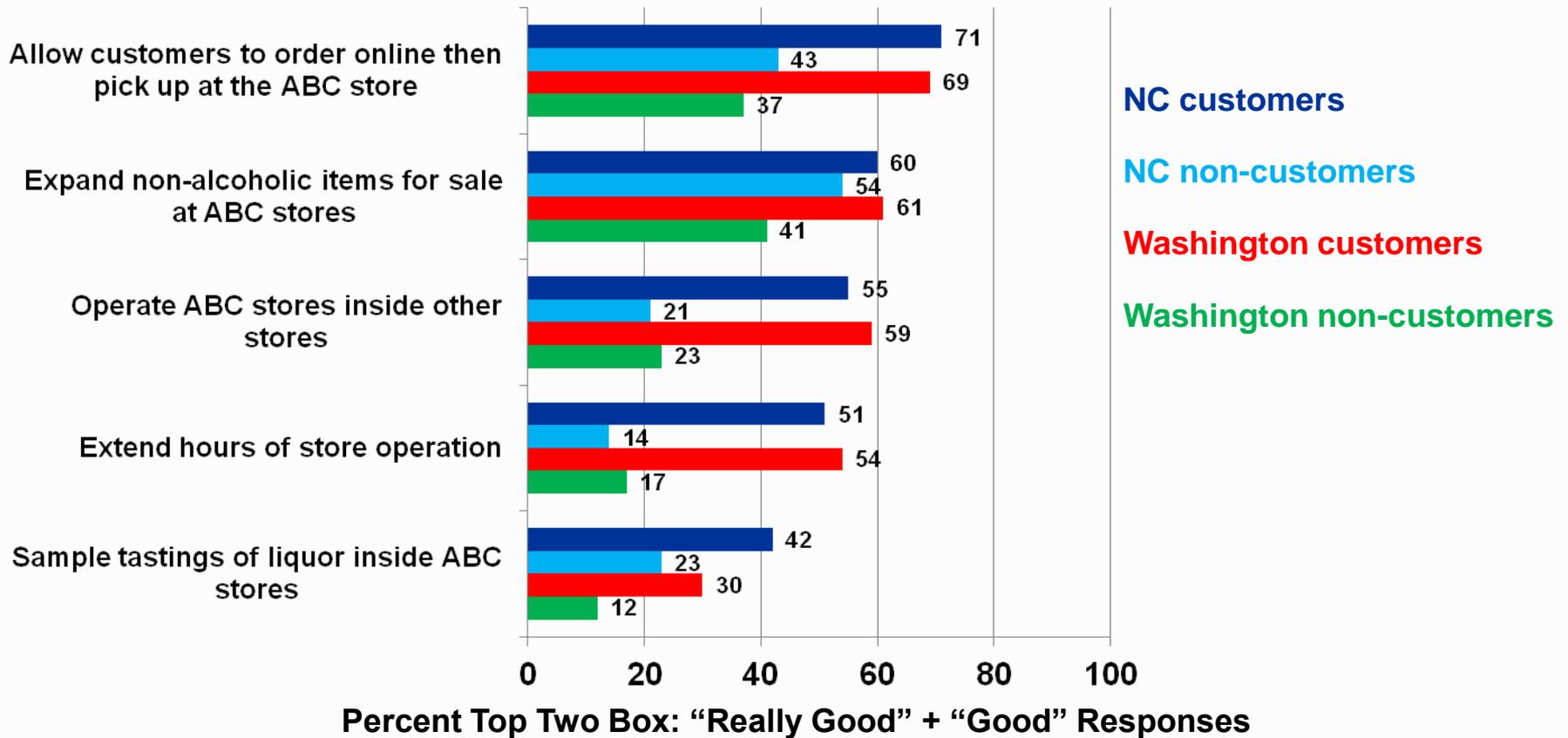
Washington State Customers **North Carolina Customers**

What grade would you give the liquor store you shop most often for ... ?



North Carolina customers and non-customers Top Two Box scores for customer service ideas and convenience improvements were similar to those in Washington State.

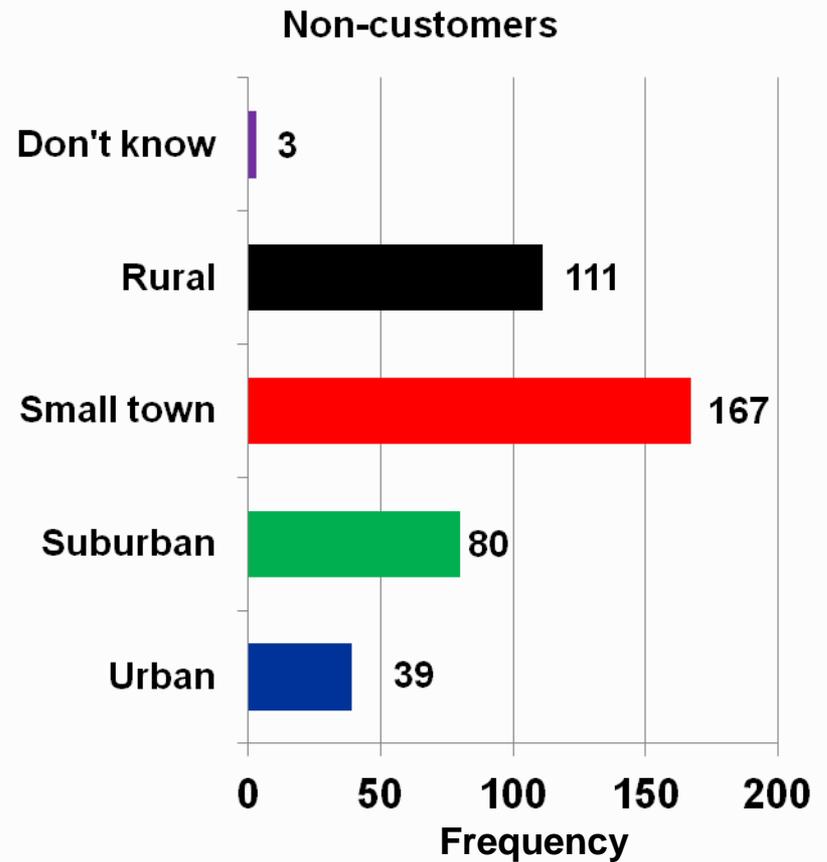
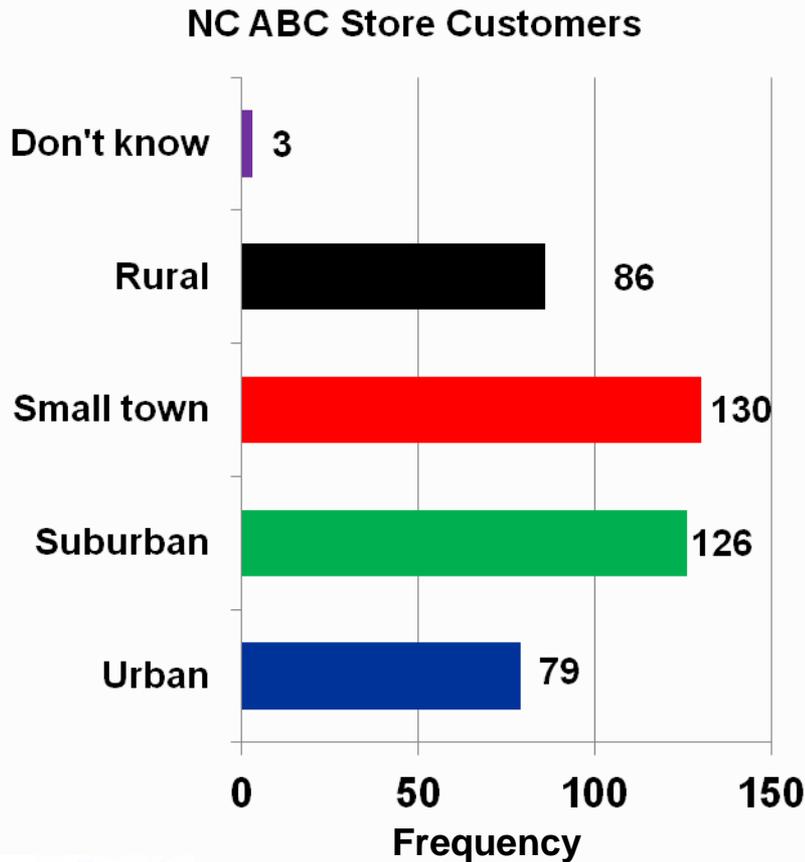
What do you think of the idea to ...? Do you think it is a really bad idea, bad idea, good idea, or a really good idea?



Analysis by location – urban, suburban, small town, rural

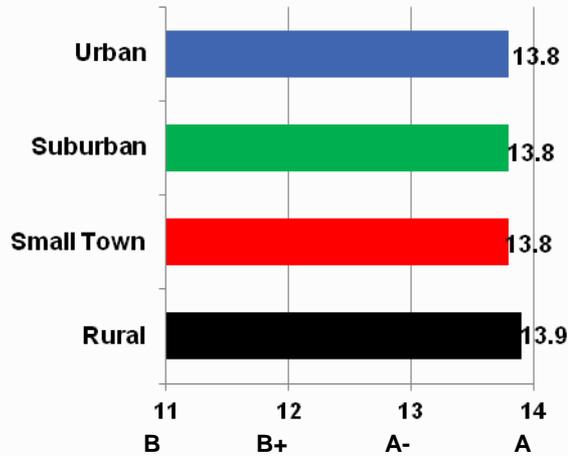
Respondent self-identified information enables exploratory analysis by urban vs. suburban vs. small town vs. rural location.

Would you describe the area where you live in North Carolina as Urban, Suburban, Small town, or Rural?

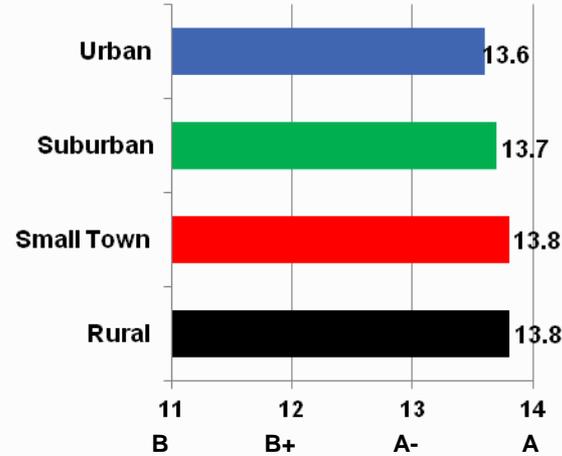


Customers graded their ABC store similarly high across locations for the interior of the store, staff professionalism, and product supply.

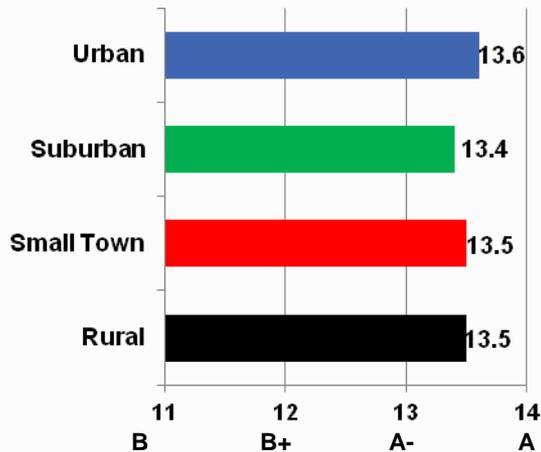
Cleanliness of store's interior



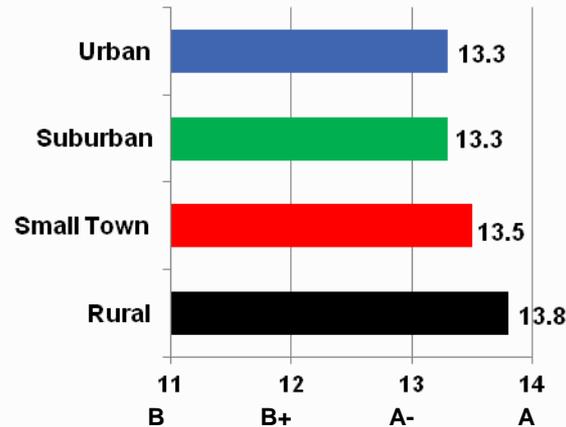
Courtesy of the staff



Professionalism of the staff

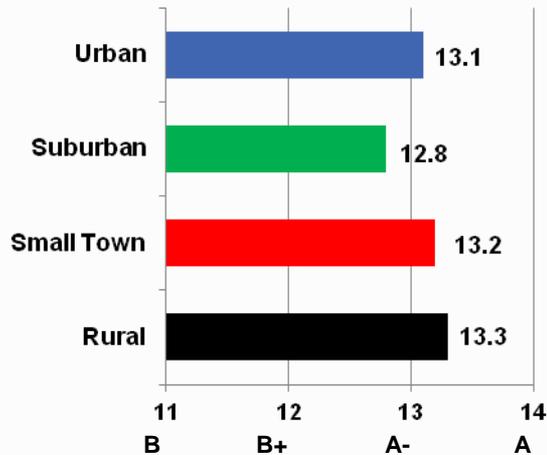


Adequate supply of the product you shop for

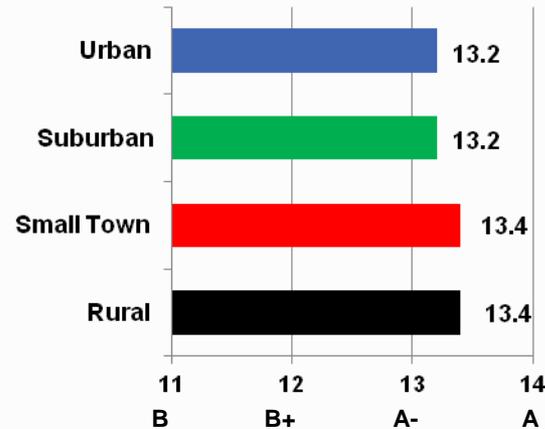


Customers in small towns graded help with special orders higher than other locations, but most don't know if they can special order.

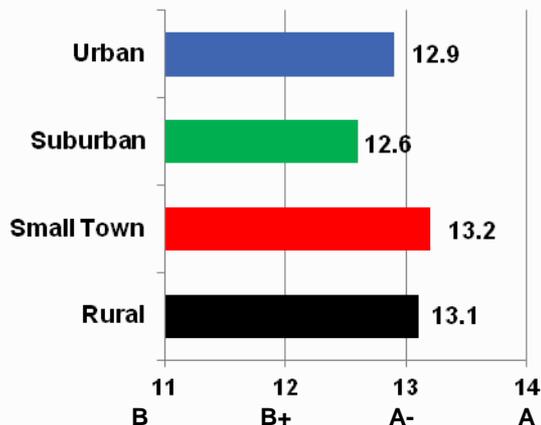
Selection of liquor offered



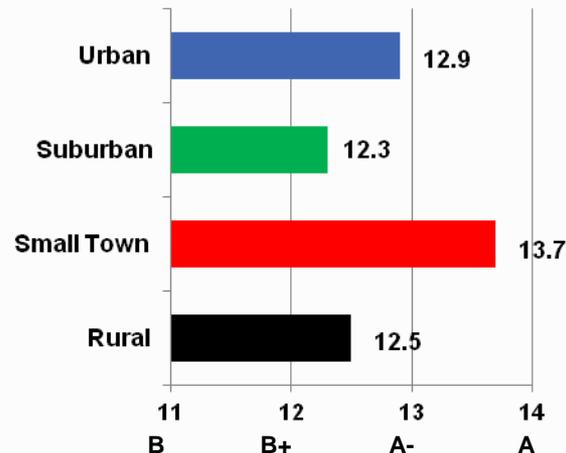
Staff's knowledge about products offered



Number of staff members available to help customers



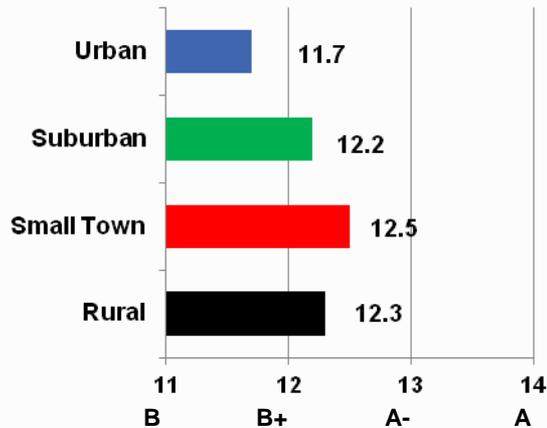
Helpfulness in getting special orders



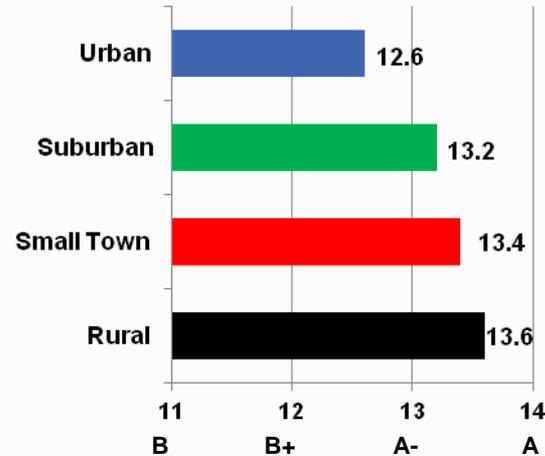
Majority of customers do not know they can make special orders.

Customers in urban store locations graded their stores lower in convenience of operating hours, location, and interior layout.

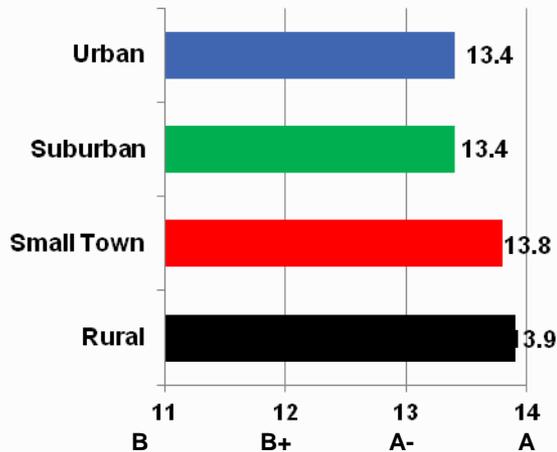
Convenience of the store's operating hours



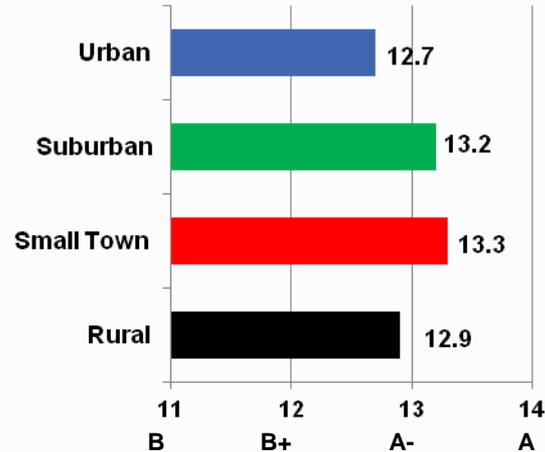
Convenience of the interior layout



Speed of checkout

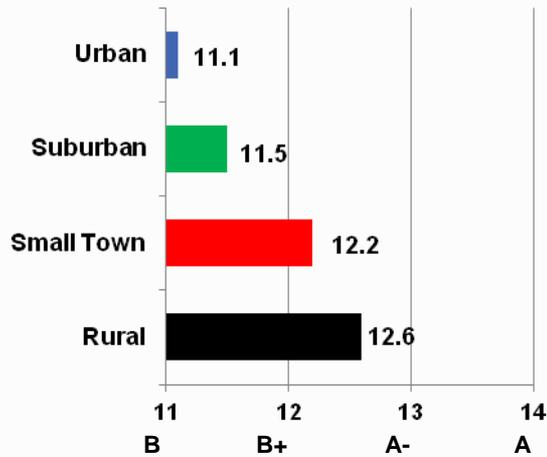


Convenience of the store's location

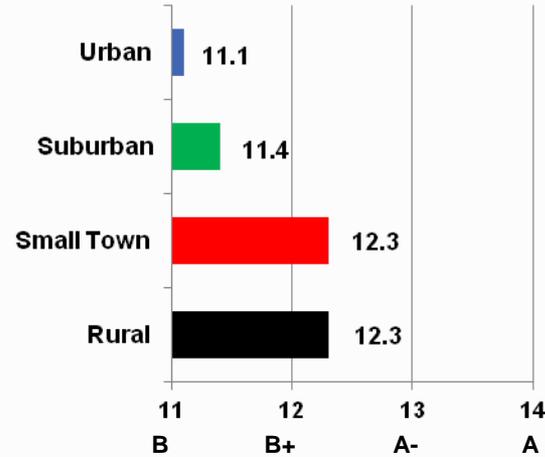


Customers in rural locations graded their ABC store higher in value for the money and interior shopping than did customers in other locations.

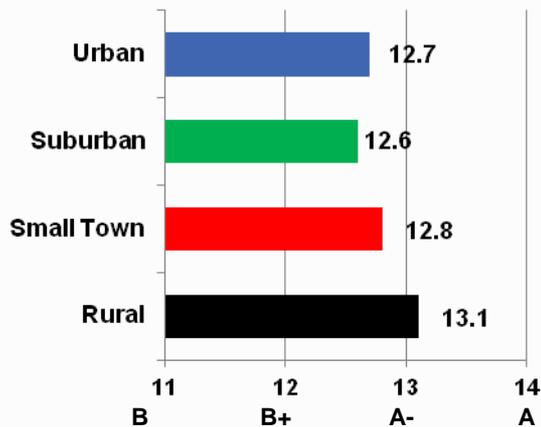
Value for the money



Store's prices are reasonable

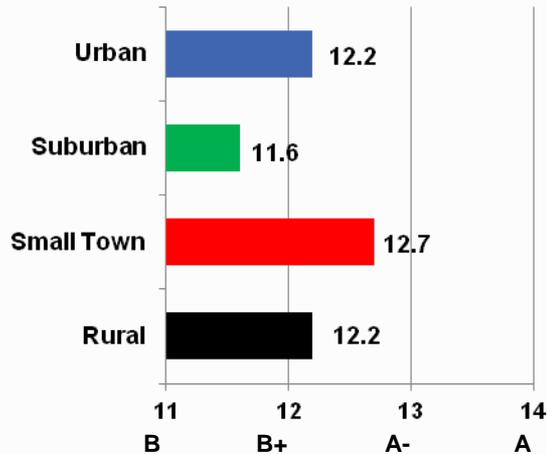


Interior of the store encourages shopping

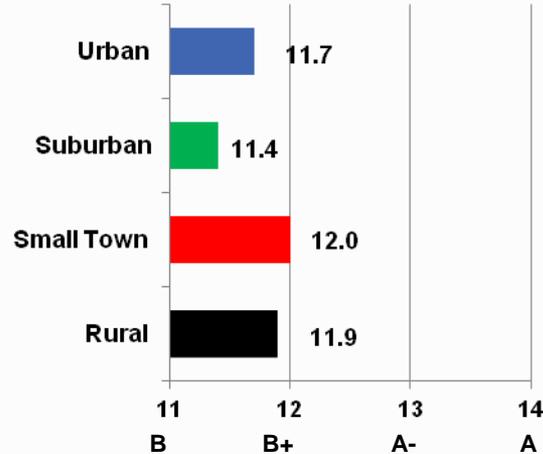


Customers in suburban locations graded their stores lower in exterior characteristics; urban locations graded parking lot safety lower.

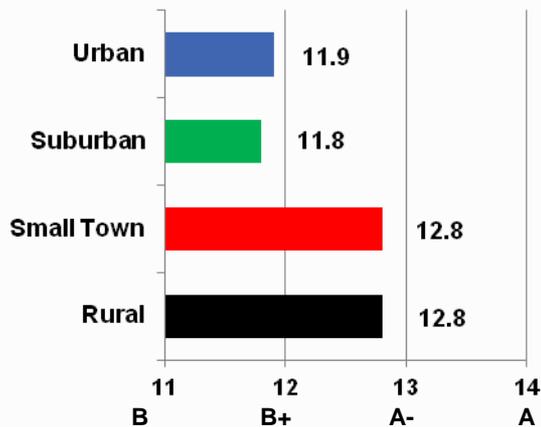
Exterior of the store is welcoming



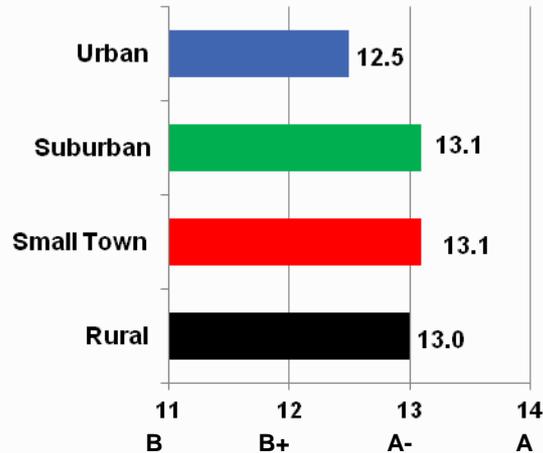
Outside attractiveness of the store



Visibility of outside signs identifying the store

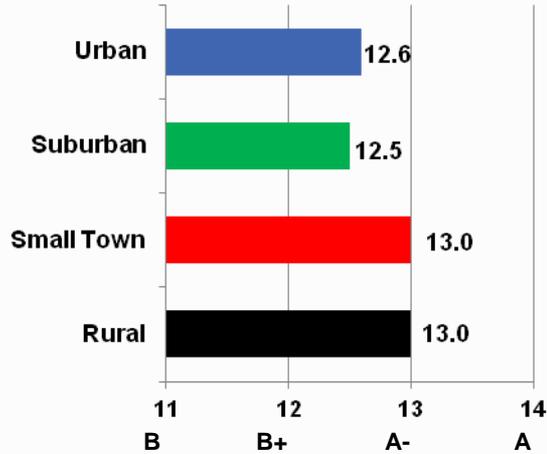


Safety in the store's parking lot

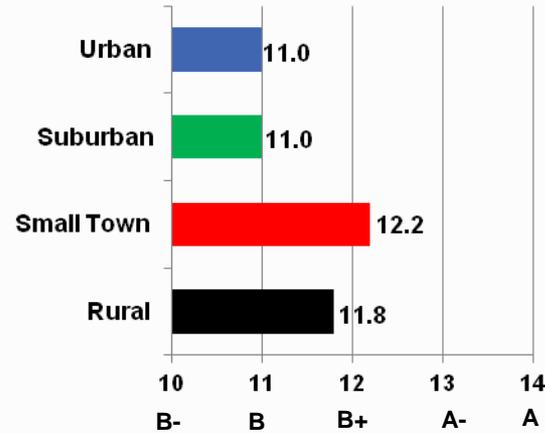


Most customers in small town and rural locations graded their stores and local boards higher in reputation, governance and citizenship, but many customers knew nothing about these.

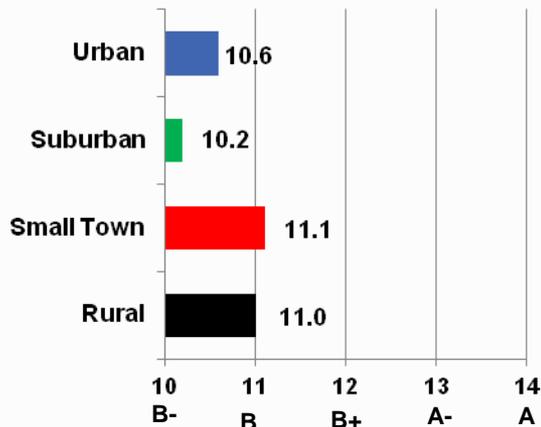
Reputation of the ABC store



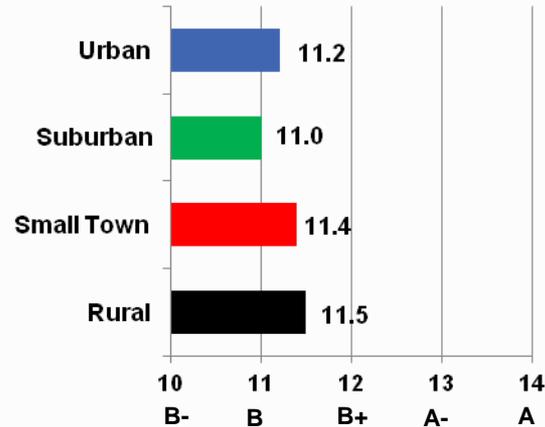
Governance and oversight by the local ABC board



Your local store's community citizenship in promoting public health



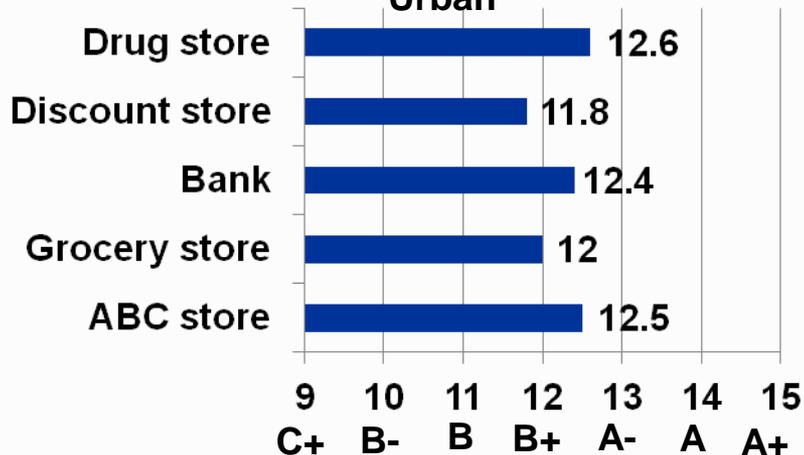
Your local store's community citizenship in promoting public safety



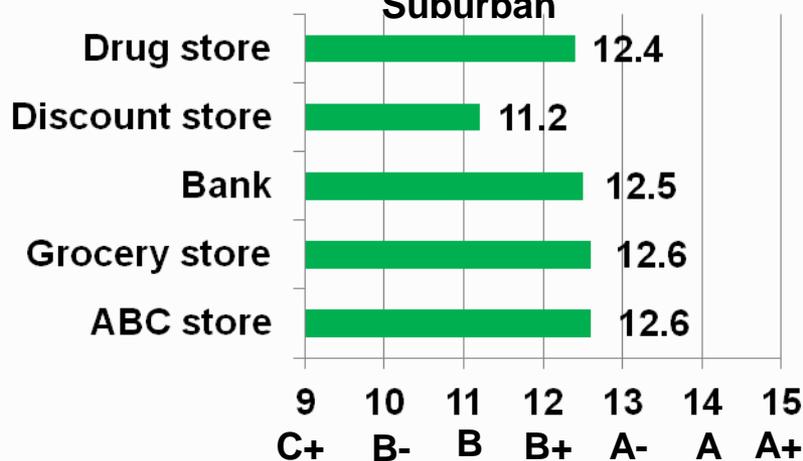
Customers graded the ABC store in rural communities higher overall than those in other locations.

“What overall grade would you give to your local _____?”

Urban



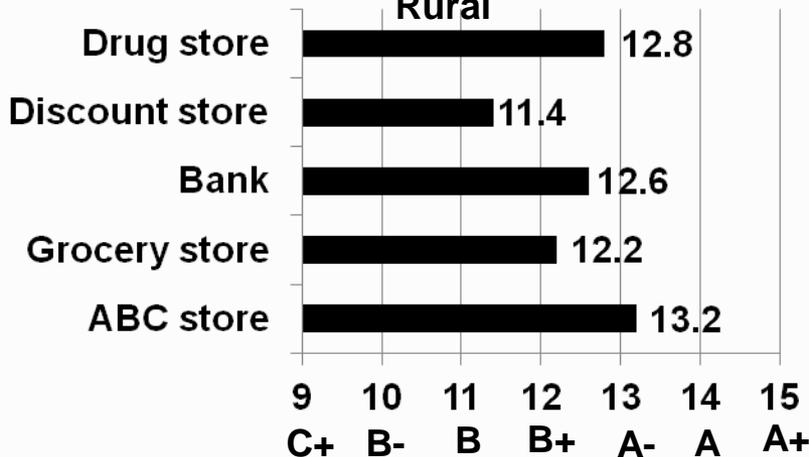
Suburban



Small Town

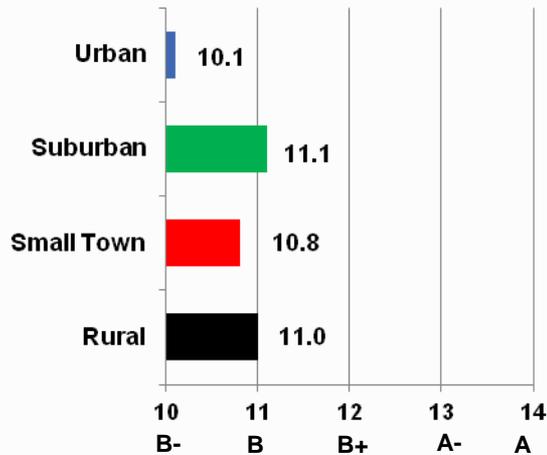


Rural

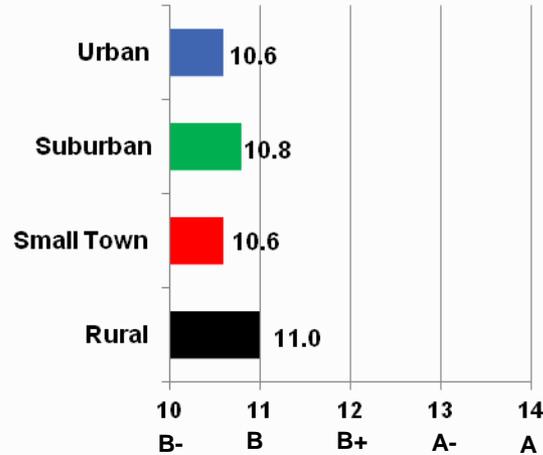


Many non-customers don't know enough about the liquor store in their community to offer an opinion; those who do give store exterior characteristics B's.

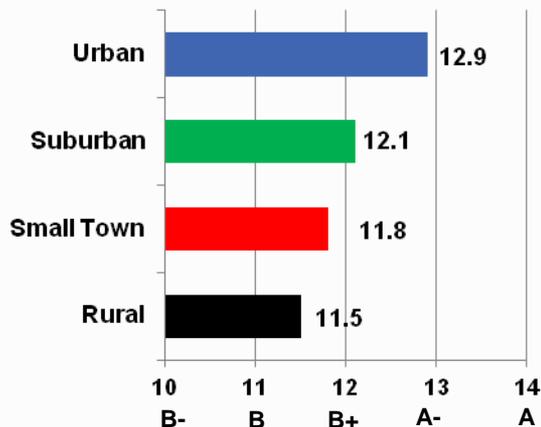
Exterior of the store is welcoming



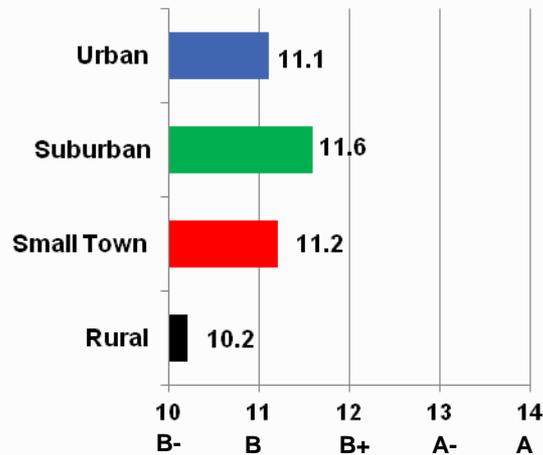
Outside attractiveness of the store



Visibility of outside signs identifying the store

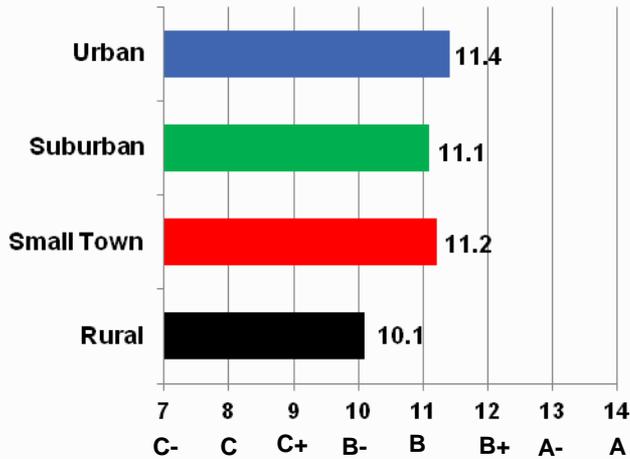


Safety in the store's parking lot

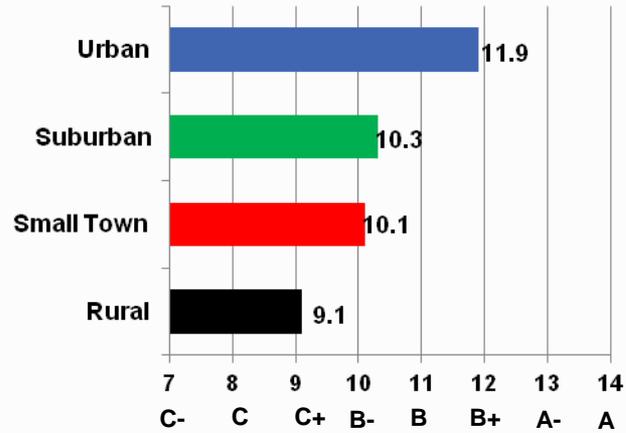


Those few non-customers who had opinions gave low grades to their ABC store's community citizenship promoting public health and safety; rural sites got particularly low grades.

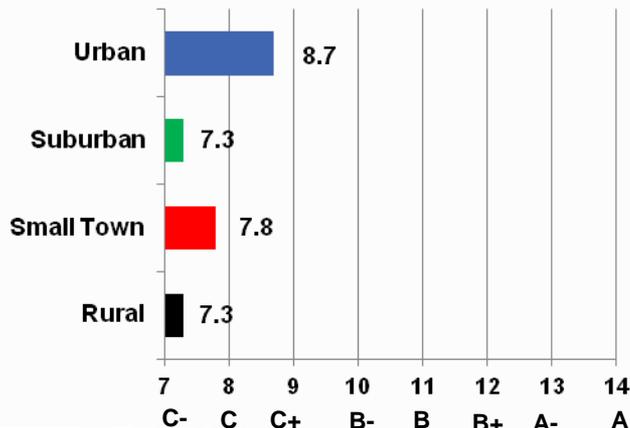
Reputation of the ABC store



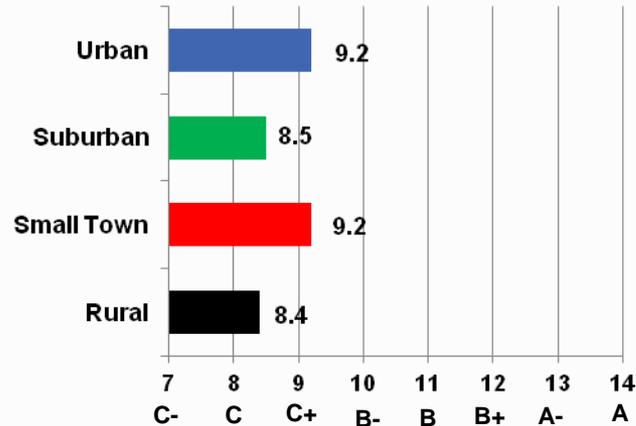
Governance and oversight by the local ABC board



Your local store's community citizenship in promoting public health

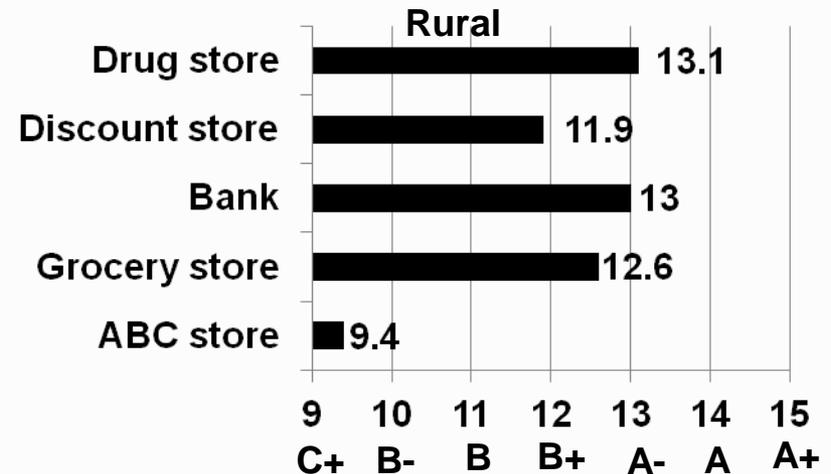
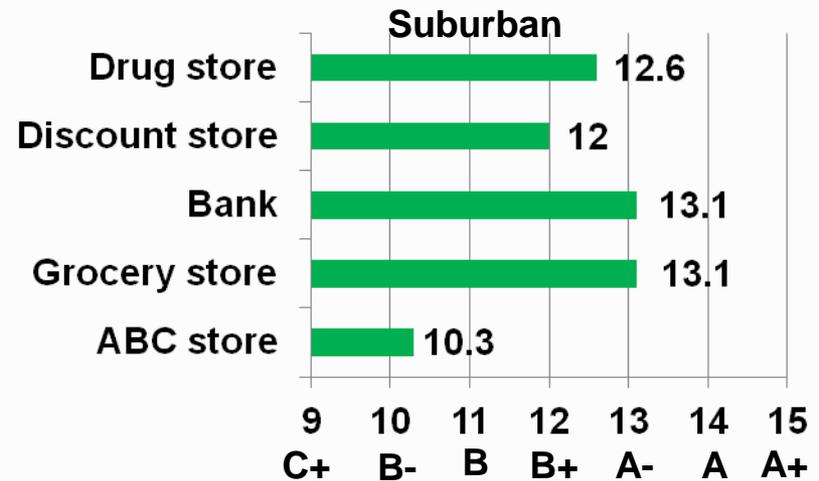
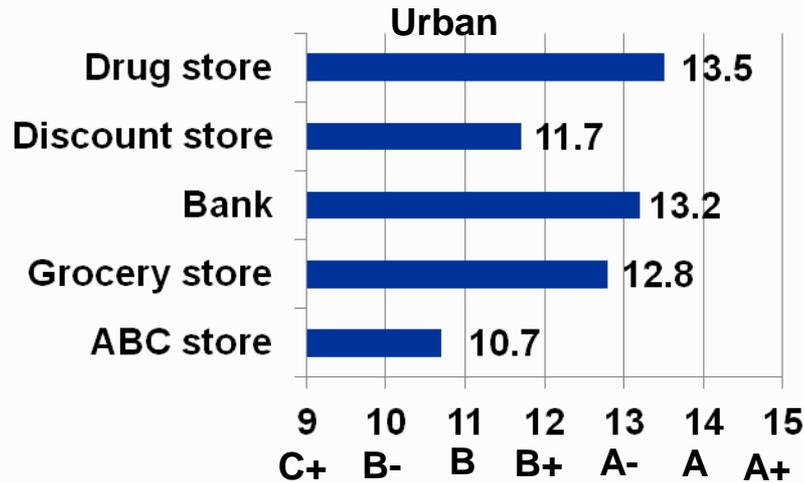


Your local store's community citizenship in promoting public safety



Non-customers graded the ABC store in rural communities lower overall than those in other locations.

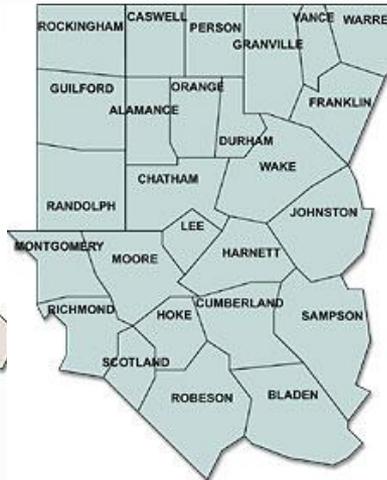
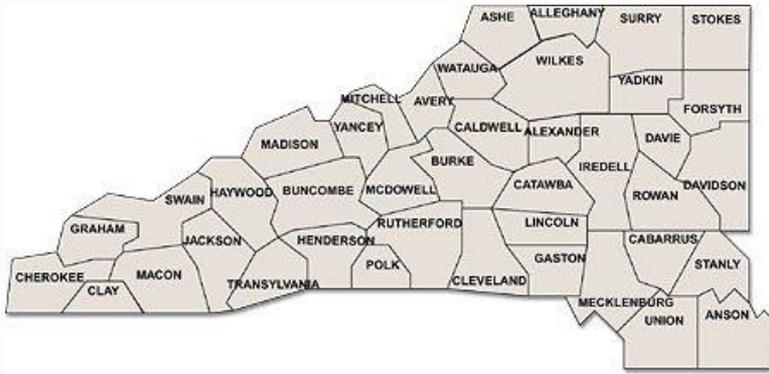
“What overall grade would you give to your local _____?”



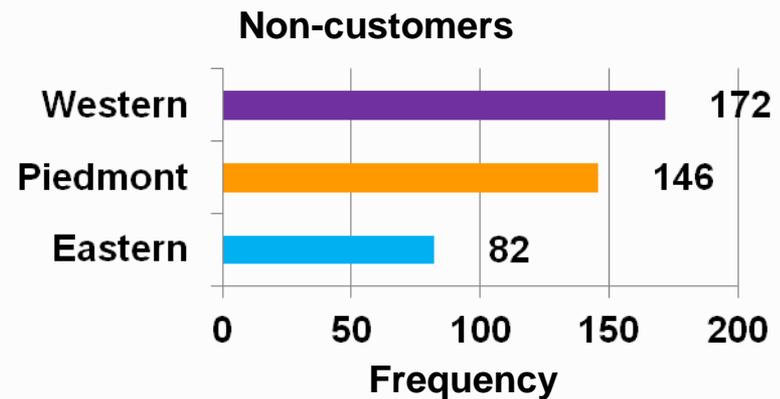
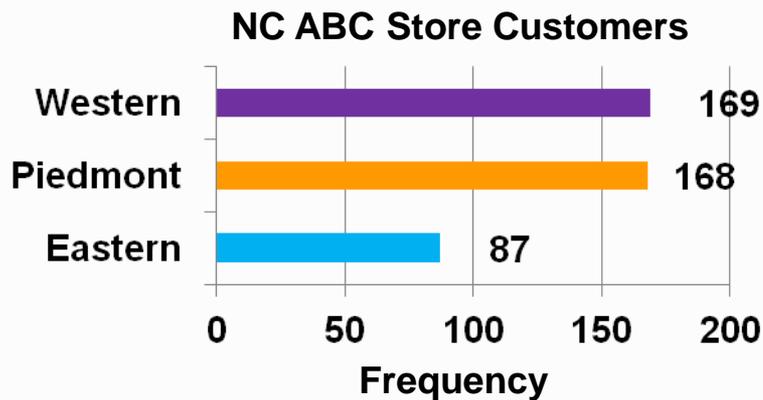
Analysis by NC regions – Western, Piedmont, Eastern

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

Regions

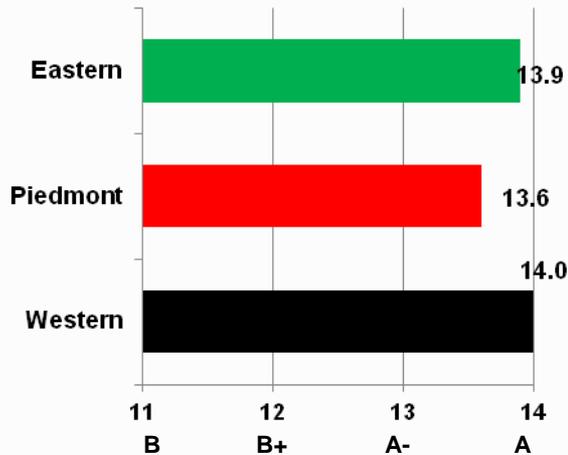


Number Respondents by Region

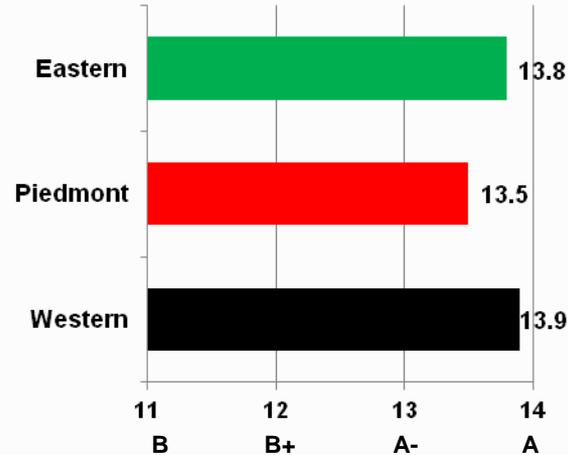


Customers in the Piedmont region graded their ABC store lower for cleanliness, staff courtesy, and staff professionalism than did customers in other regions.

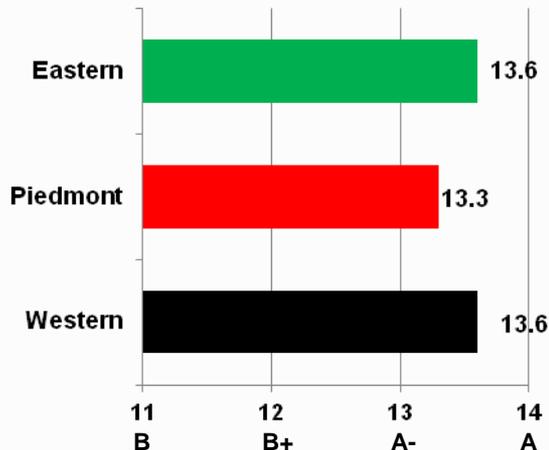
Cleanliness of store's interior



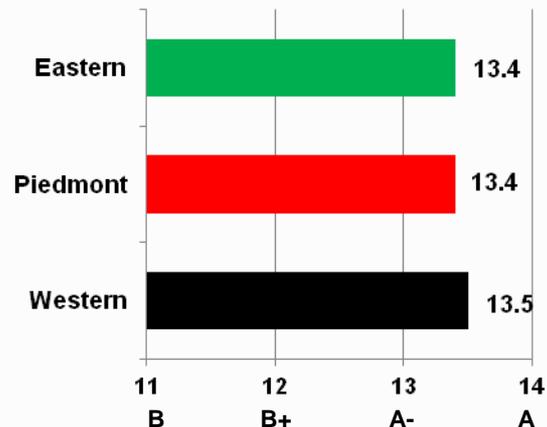
Courtesy of the staff



Professionalism of the staff

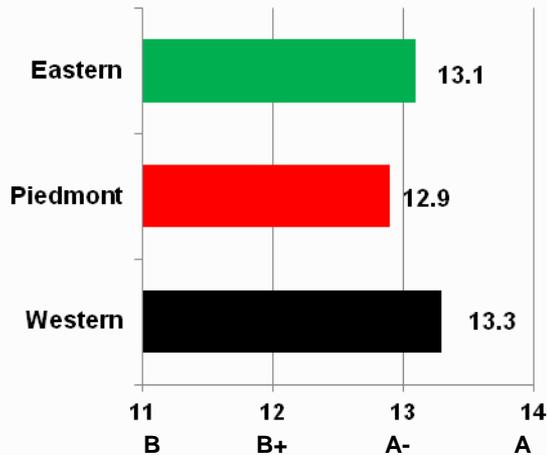


Adequate supply of the product you shop for

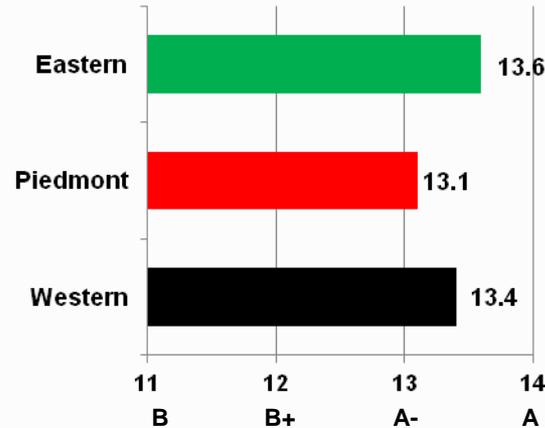


Customers in the Piedmont region graded selection, staff, and help with special orders lower than other regions; most don't know they can make special order.

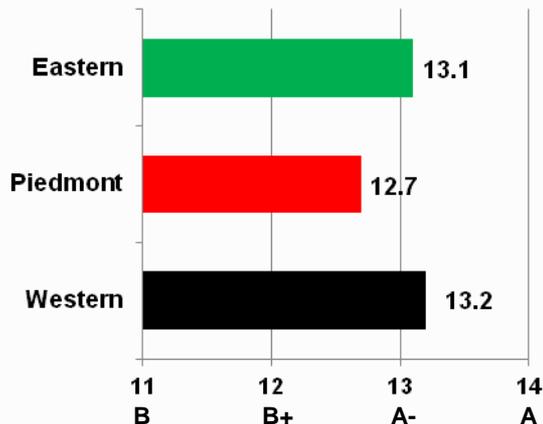
Selection of liquor offered



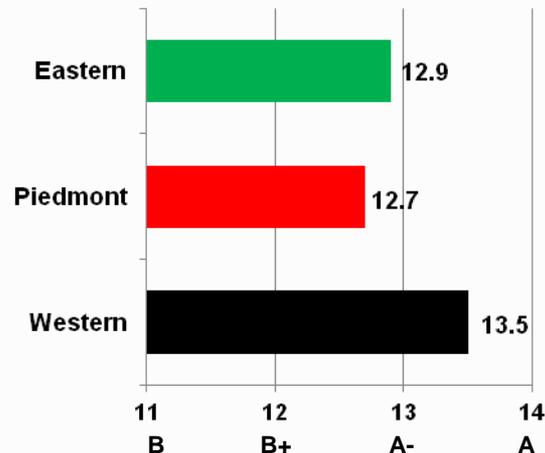
Staff's knowledge about products offered



Number of staff members available to help customers



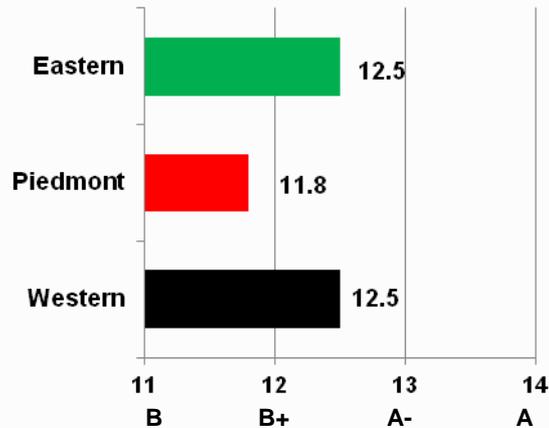
Helpfulness in getting special orders



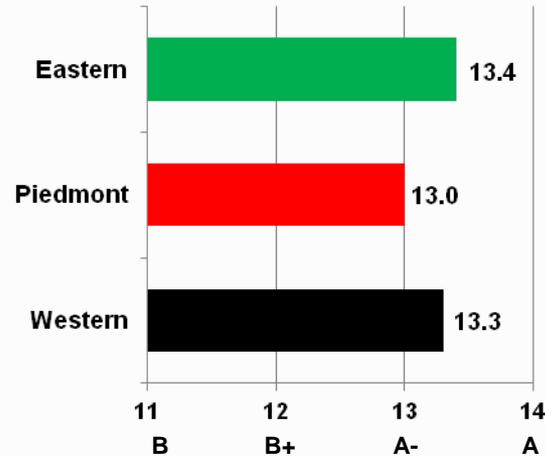
Majority of customers do not know they can make special orders.

Customers in the Piedmont region graded their stores lower in convenience of operating hours, location, interior layout and speed of checkout.

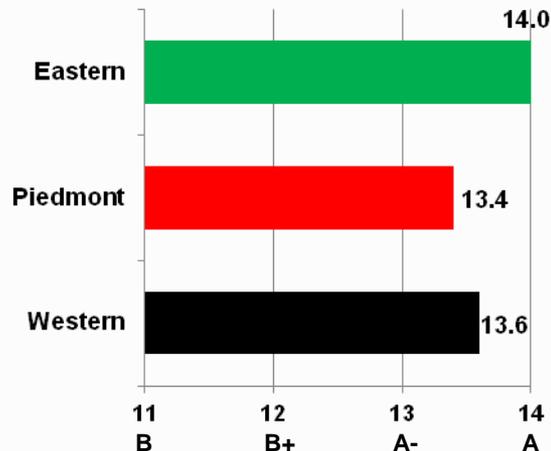
Convenience of the store's operating hours



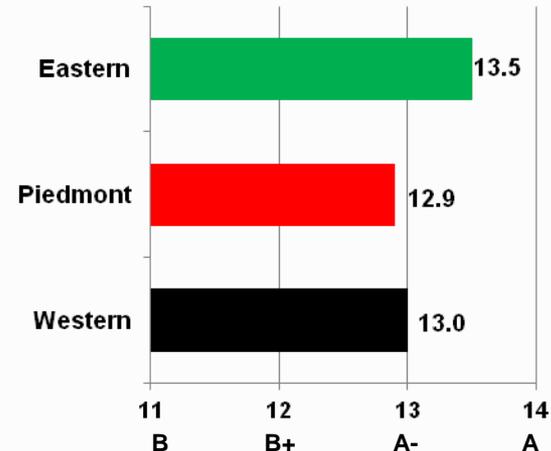
Convenience of the interior layout



Speed of checkout

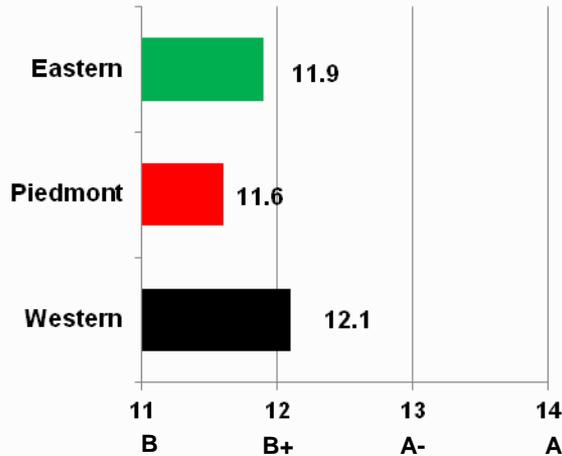


Convenience of the store's location

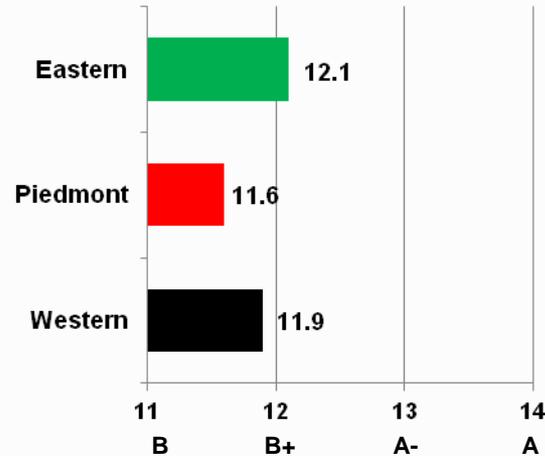


Customers in the Piedmont graded their ABC store lower in value for the money, reasonable prices, and interior than did customers in other regions.

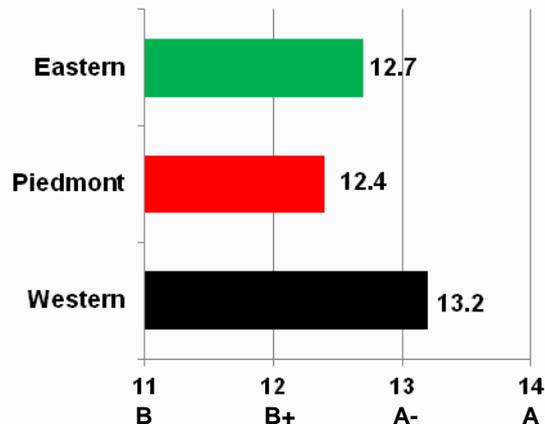
Value for the money



Store's prices are reasonable

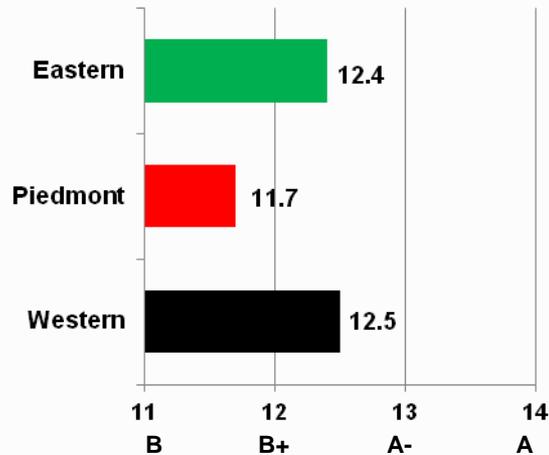


Interior of the store encourages shopping

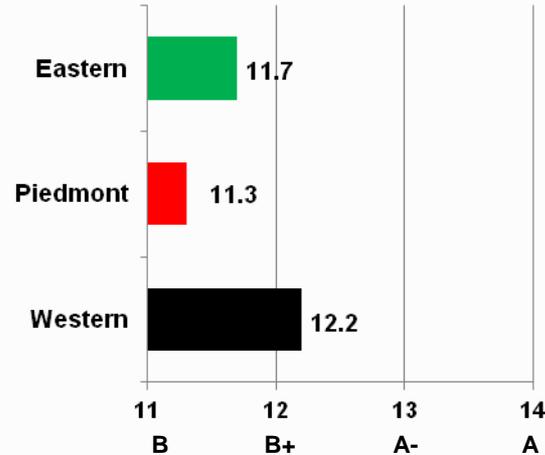


Customers in the Piedmont region graded their stores lower in exterior characteristics and sign visibility.

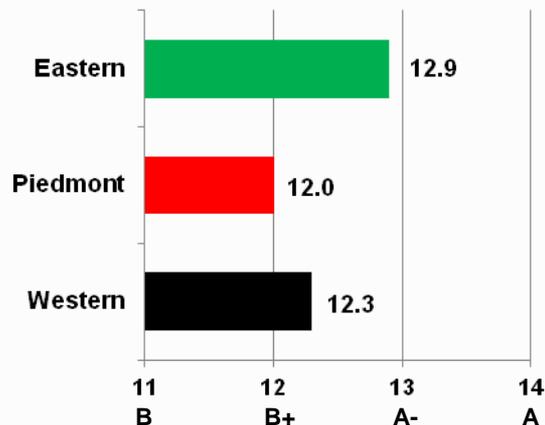
Exterior of the store is welcoming



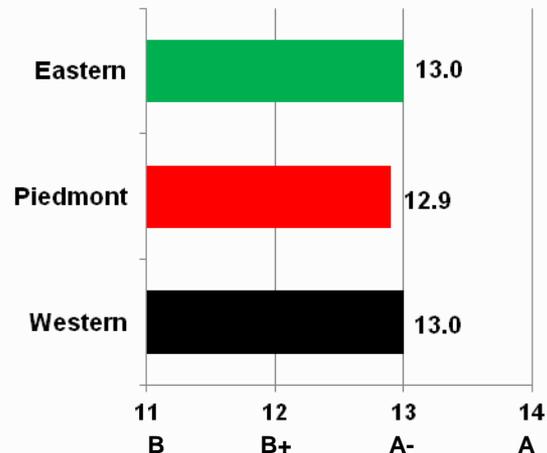
Outside attractiveness of the store



Visibility of outside signs identifying the store

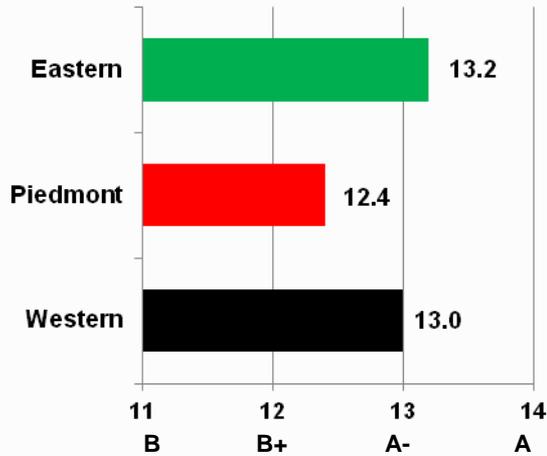


Safety in the store's parking lot

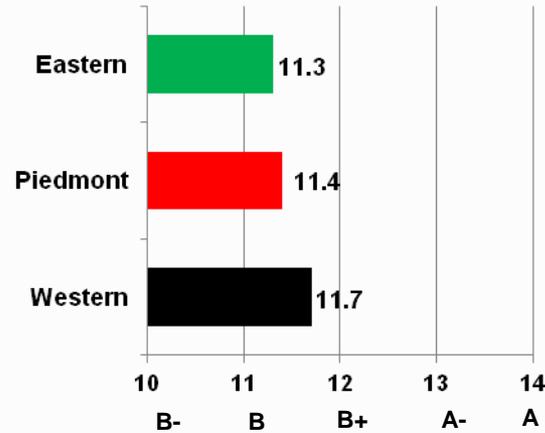


Most customers in Eastern and Western regions graded their stores higher in reputation and community citizenship, but many customers in all regions knew nothing about these.

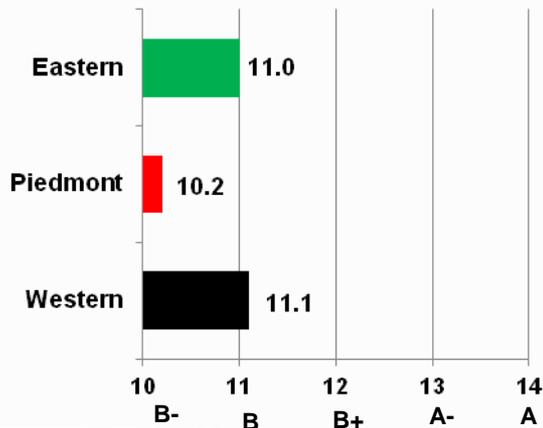
Reputation of the ABC store



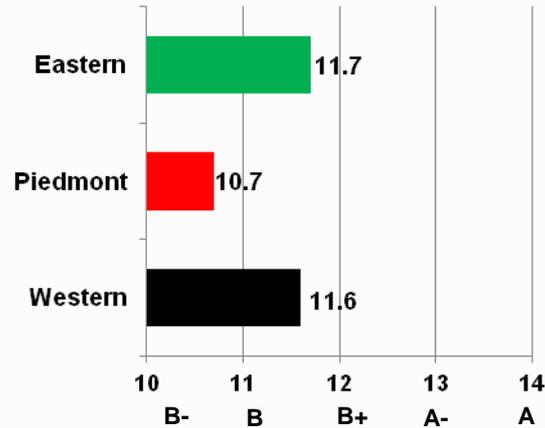
Governance and oversight by the local ABC board



Your local store's community citizenship in promoting public health

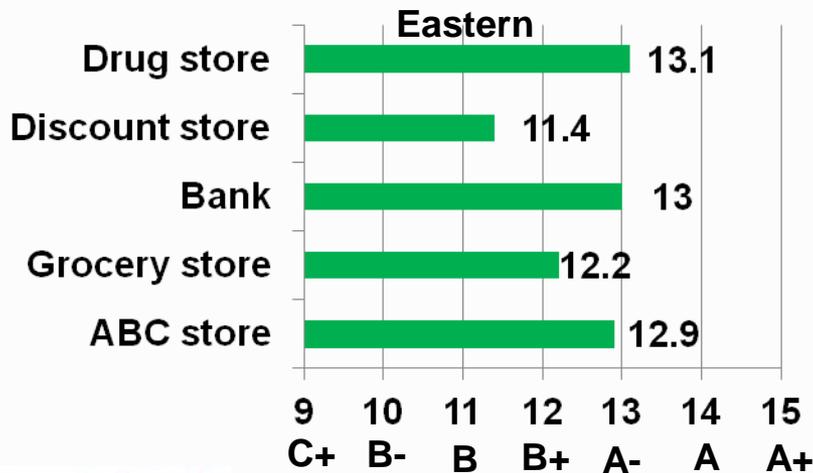
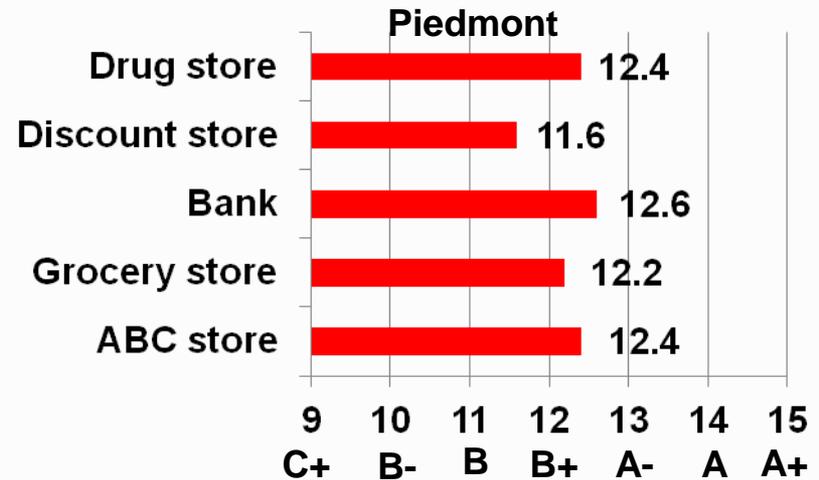
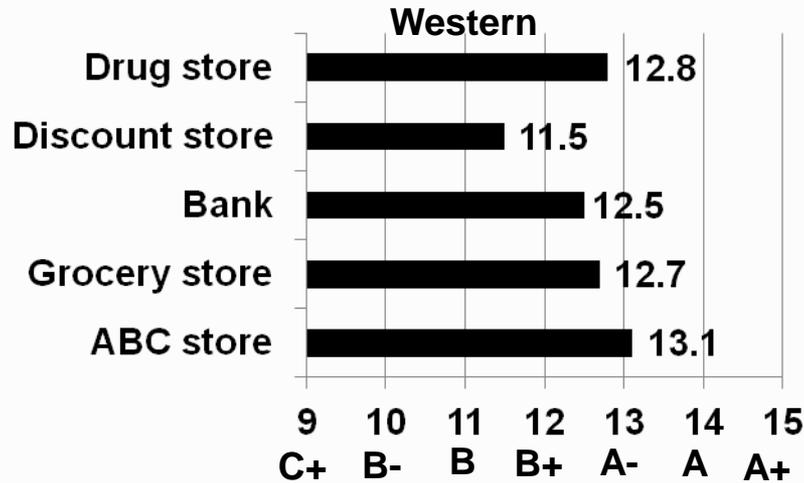


Your local store's community citizenship in promoting public safety



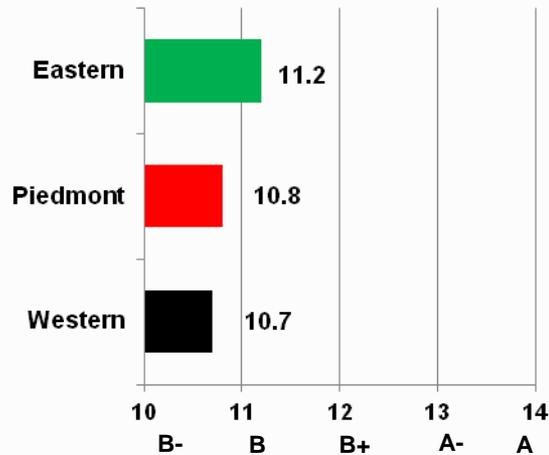
Piedmont region customers graded their ABC store lower overall than customers in other regions; all graded their ABC store as high or higher than most other retailers.

“What overall grade would you give to your local _____?”

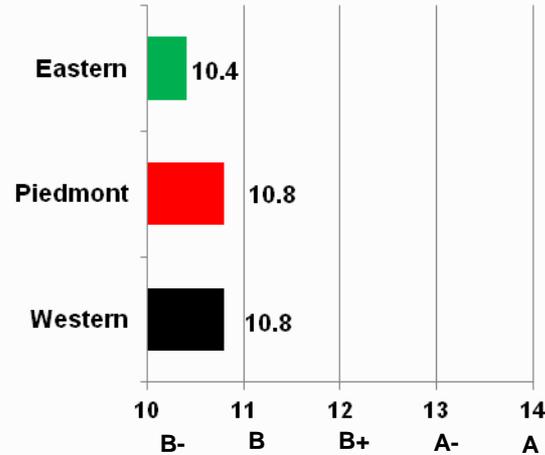


Many non-customers don't know enough about the liquor store in their community to offer an opinion; those who do give store exterior and parking lot safety "B's".

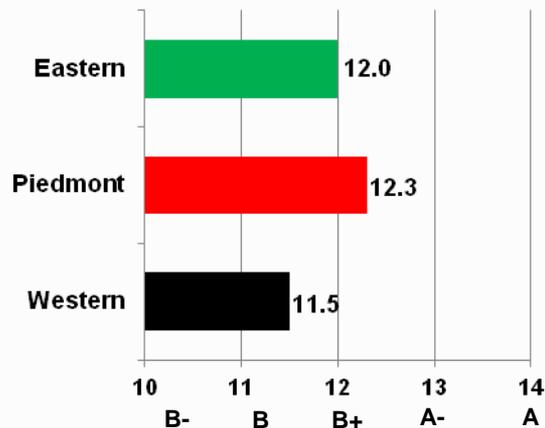
Exterior of the store is welcoming



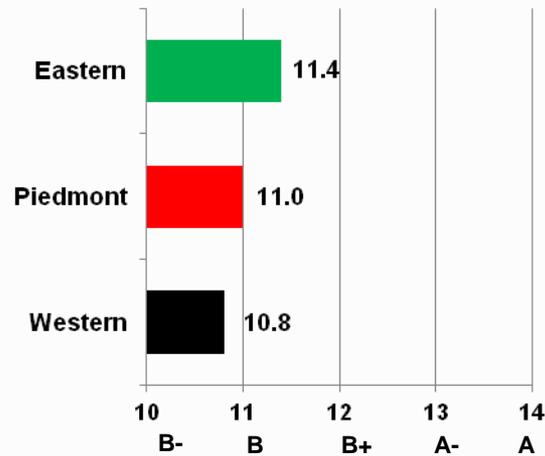
Outside attractiveness of the store



Visibility of outside signs identifying the store

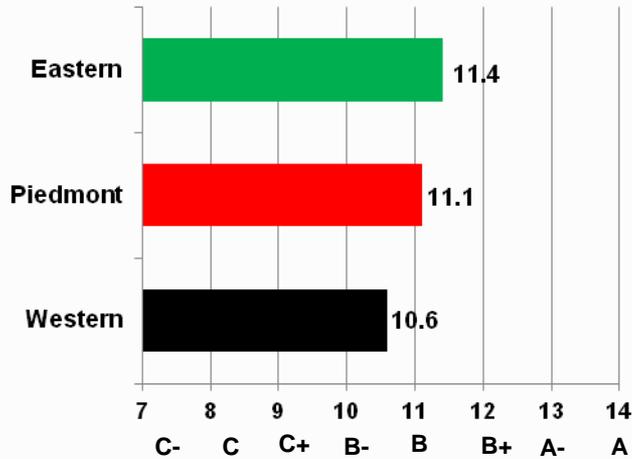


Safety in the store's parking lot

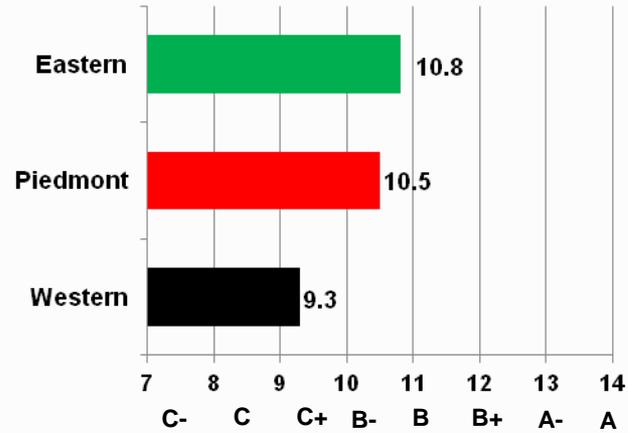


Those non-customers who had opinions gave low grades to their ABC store's community citizenship promoting public health; the Western region got particularly low grades.

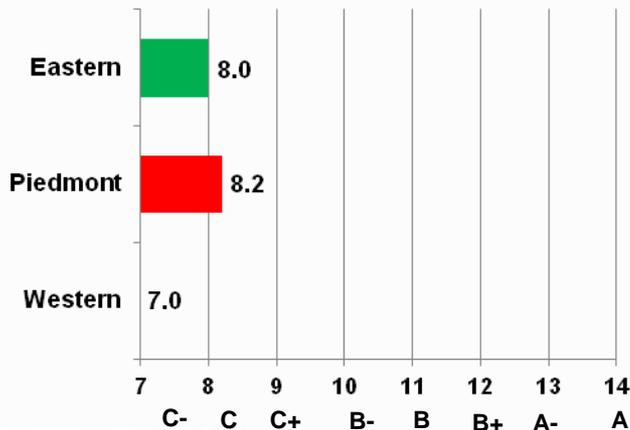
Reputation of the ABC store



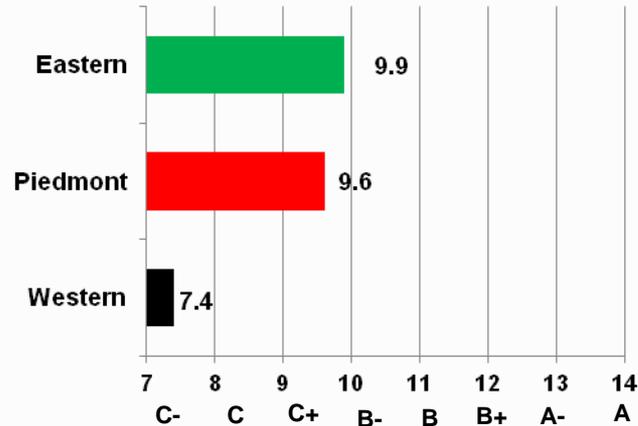
Governance and oversight by the local ABC board



Your local store's community citizenship in promoting public health

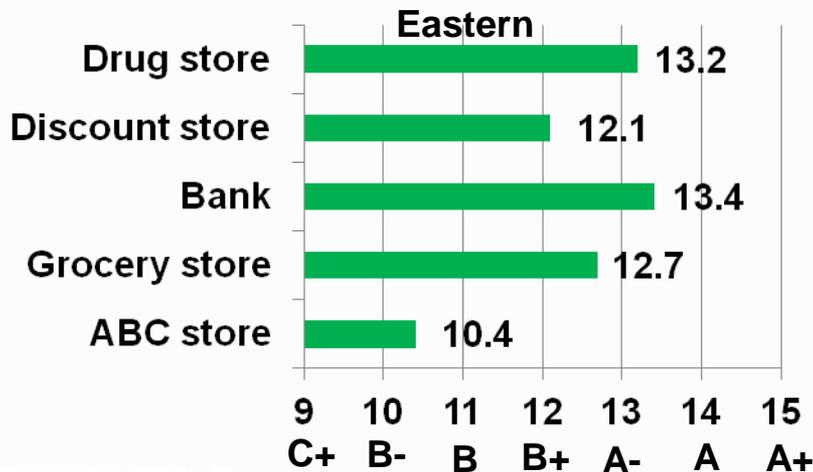
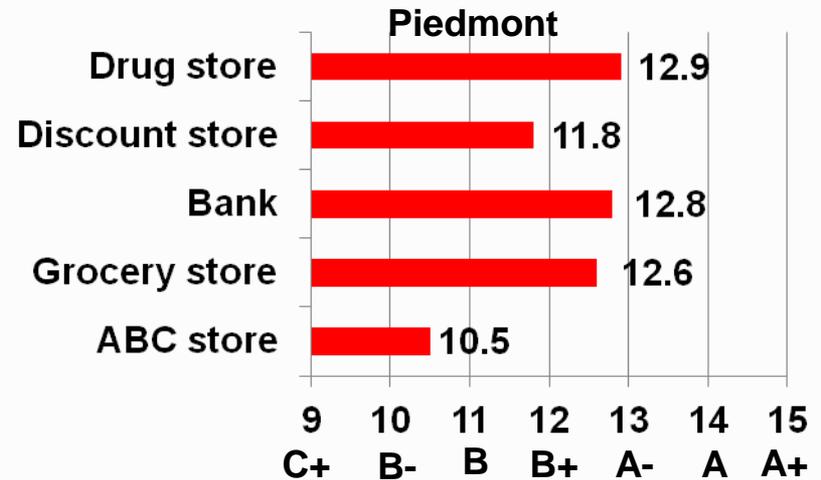
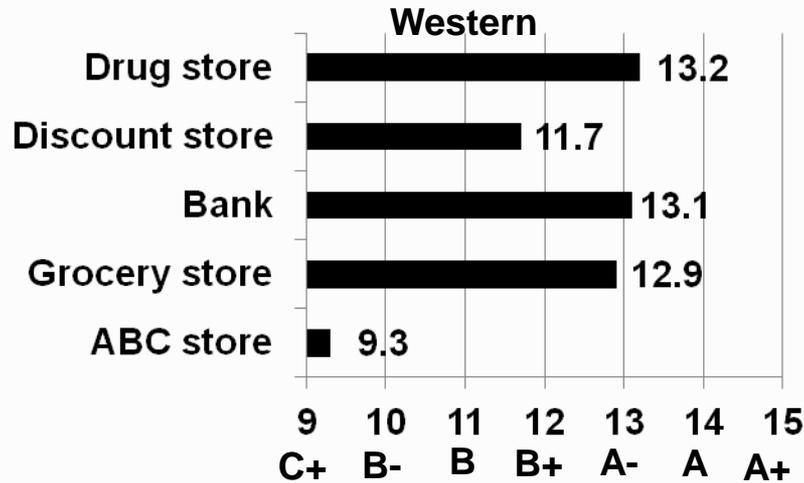


Your local store's community citizenship in promoting public safety



Non-customers in the Western region graded the ABC store in their community lower overall than those in other geographic regions; other retailers received higher grades.

“What overall grade would you give to your local _____?”

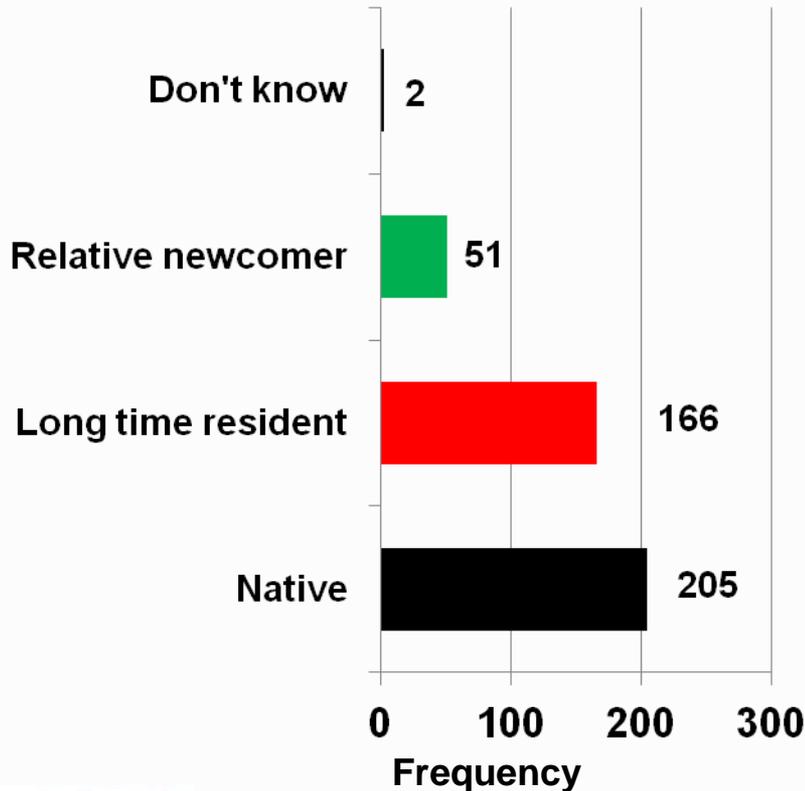


Analysis by NC residency – native, long time resident, relative newcomer

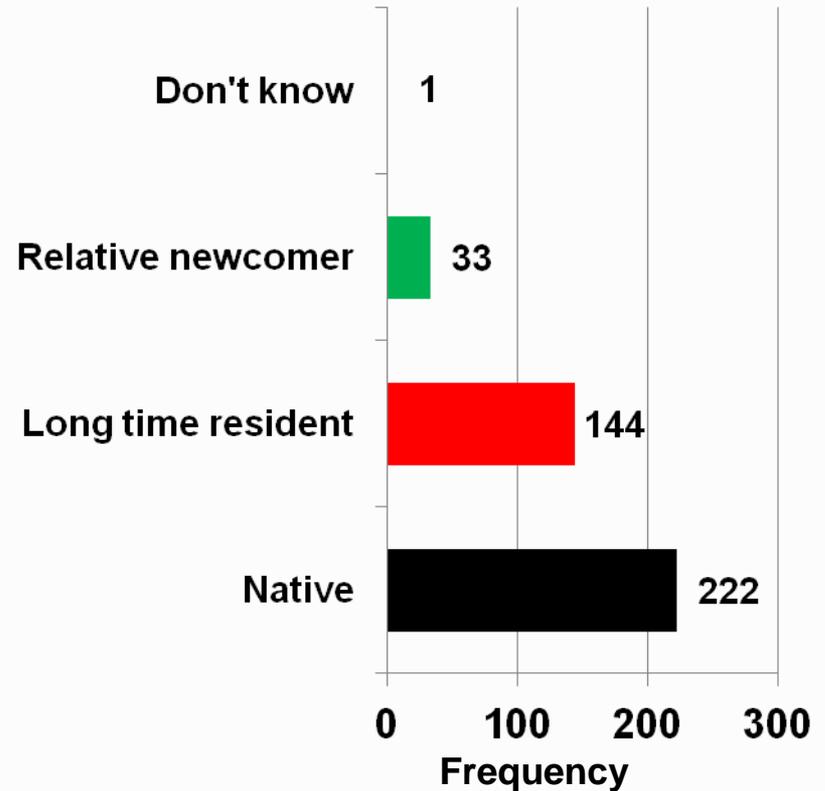
Respondent self-identified information enables exploratory analysis by NC residency -- Native vs. Long time resident vs. Relative newcomer.

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

NC ABC Store Customers

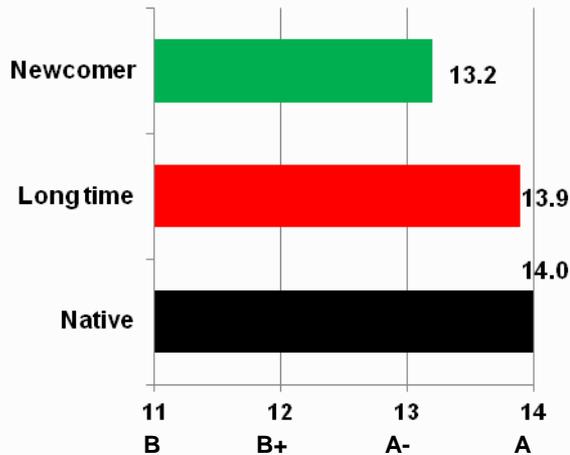


Non-customers

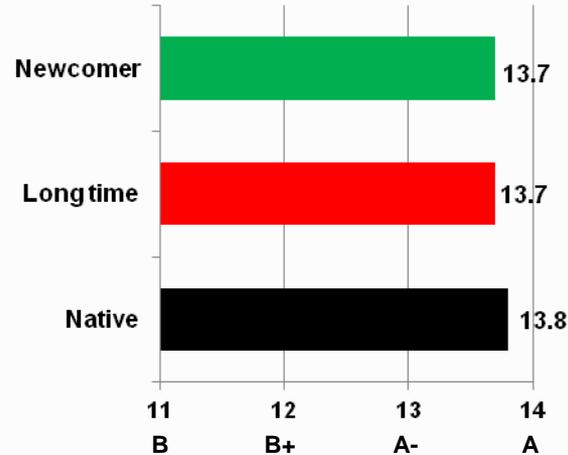


Newcomer customers graded their ABC store lower for cleanliness, staff professionalism and adequate product supply.

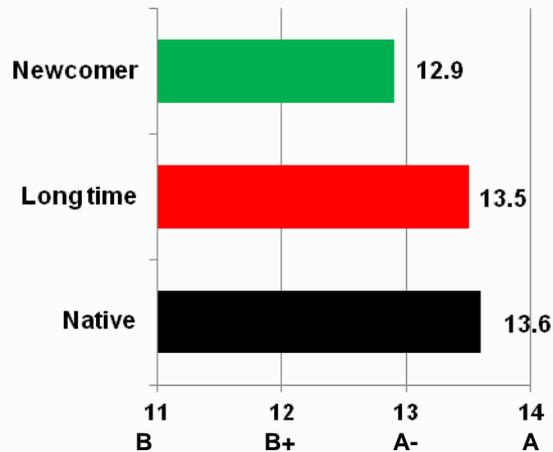
Cleanliness of store's interior



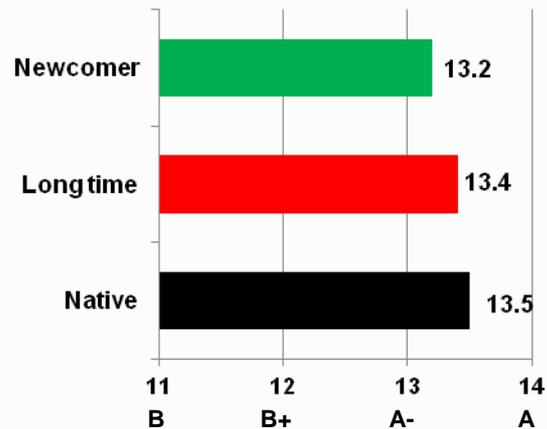
Courtesy of the staff



Professionalism of the staff

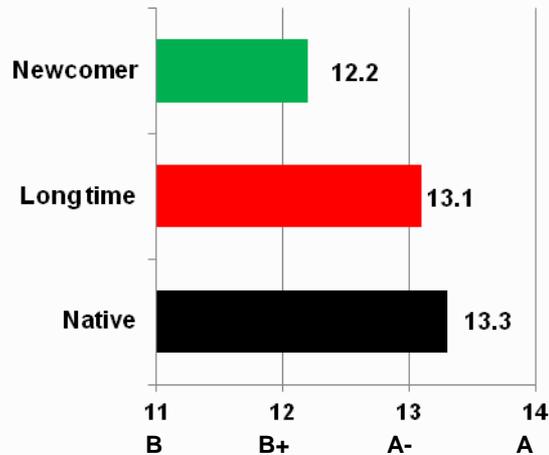


Adequate supply of the product you shop for

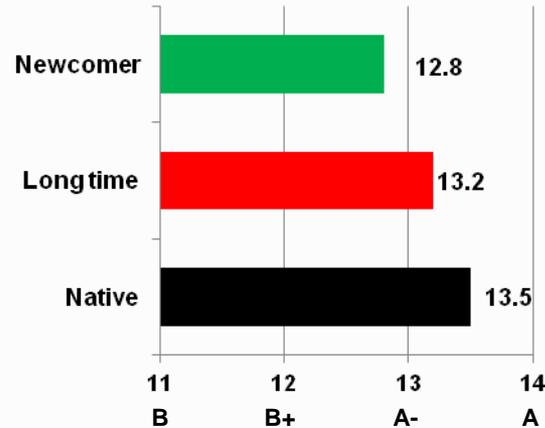


Native NC customers graded selection, staff, and help with special orders higher than long time residents or newcomers; most don't know they can make special order.

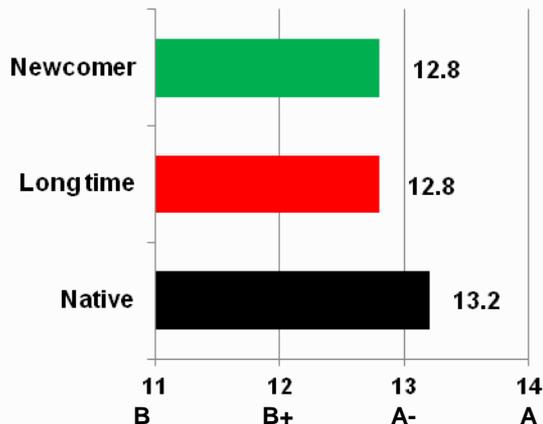
Selection of liquor offered



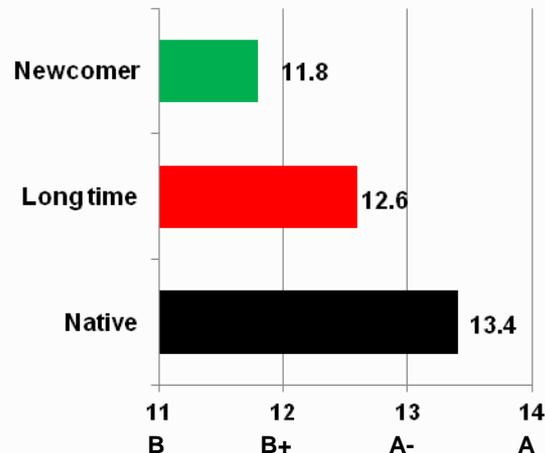
Staff's knowledge about products offered



Number of staff members available to help customers



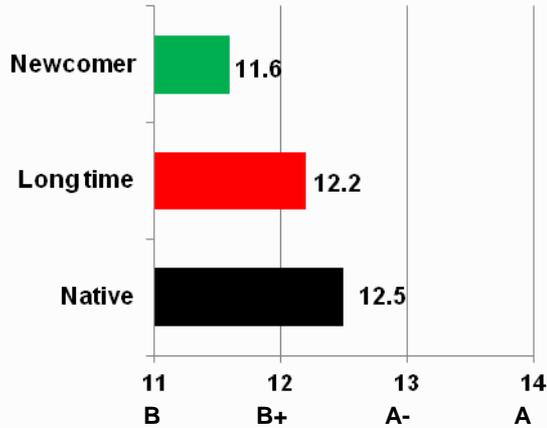
Helpfulness in getting special orders



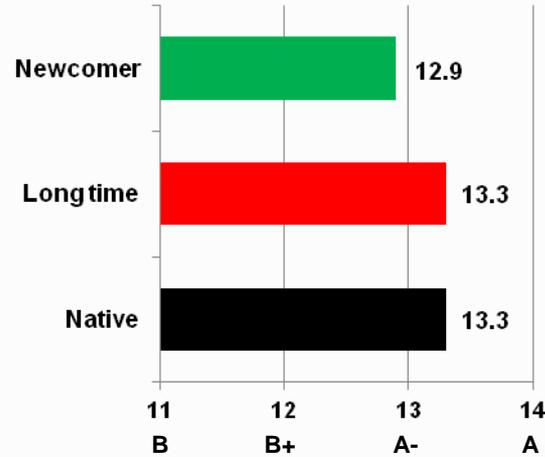
Majority of customers do not know they can make special orders.

Newcomer customers graded their store lower in convenience of operating hours, interior layout, and location.

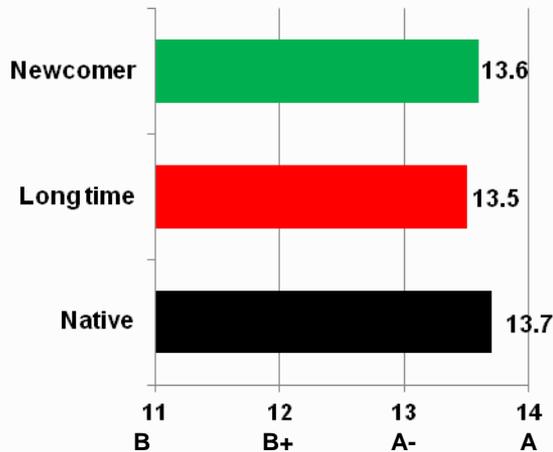
Convenience of the store's operating hours



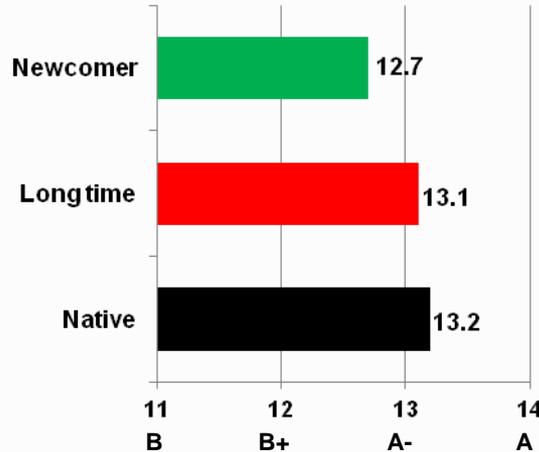
Convenience of the interior layout



Speed of checkout

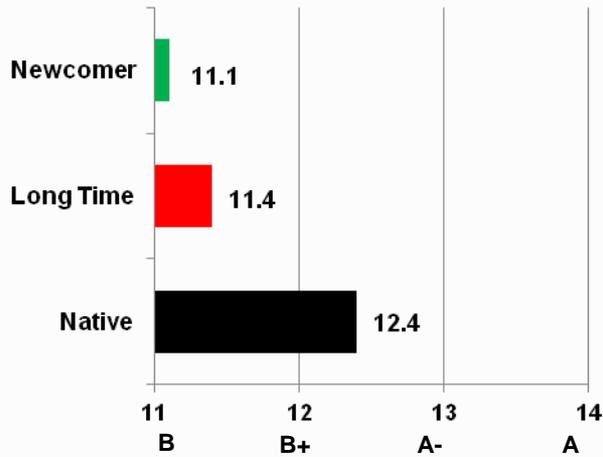


Convenience of the store's location

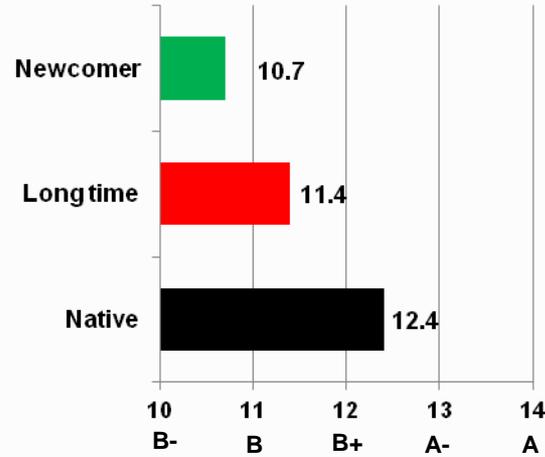


Newcomer customers graded their ABC store lower in value for the money, reasonable prices, and interior than did other customers.

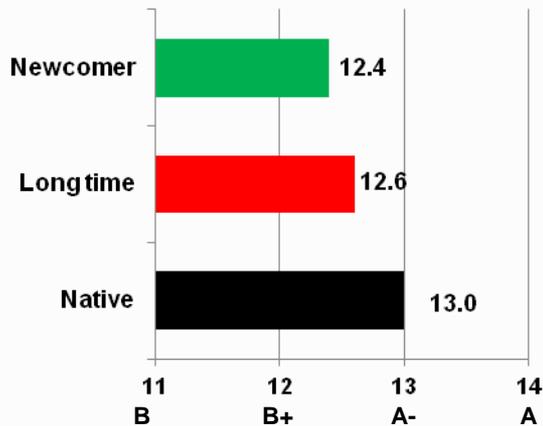
Value for the money



Store's prices are reasonable

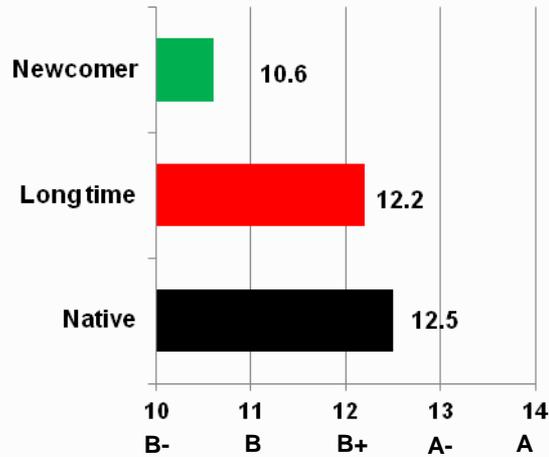


Interior of the store encourages shopping

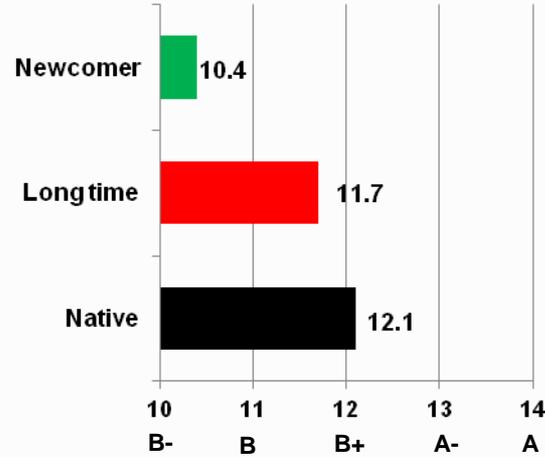


Newcomer customers graded their store lower in exterior characteristics and sign visibility.

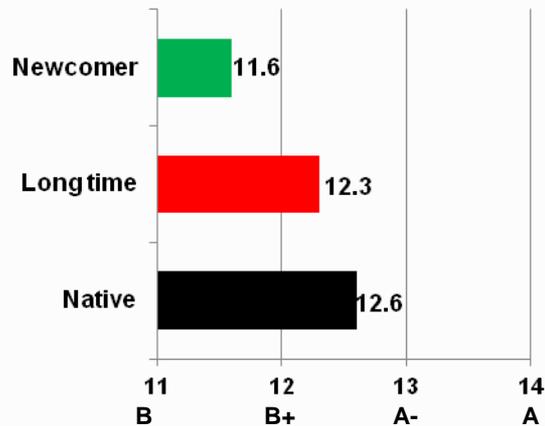
Exterior of the store is welcoming



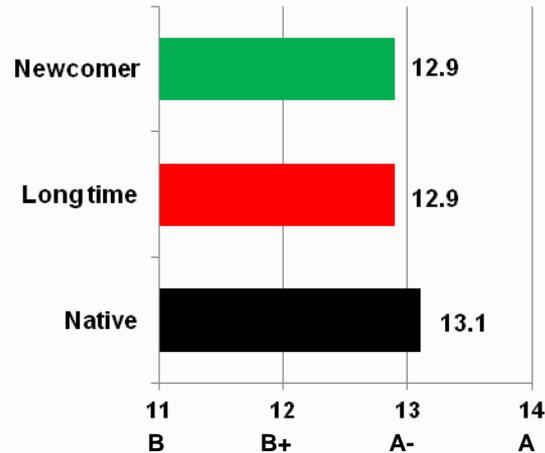
Outside attractiveness of the store



Visibility of outside signs identifying the store

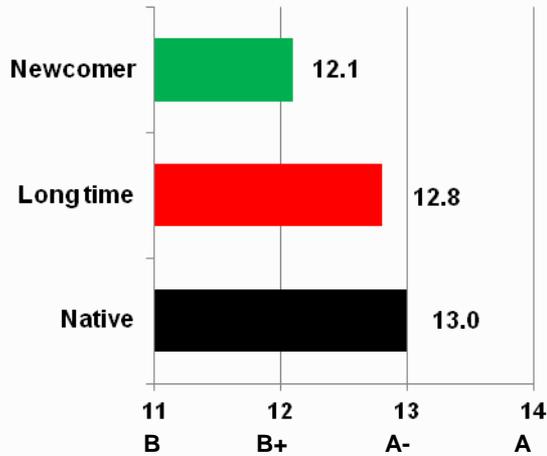


Safety in the store's parking lot

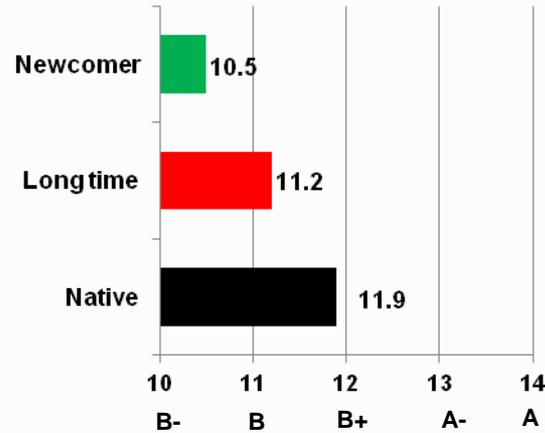


Most newcomer customers graded their store lower in reputation, local board governance and oversight, and community citizenship, but many customers knew nothing about these.

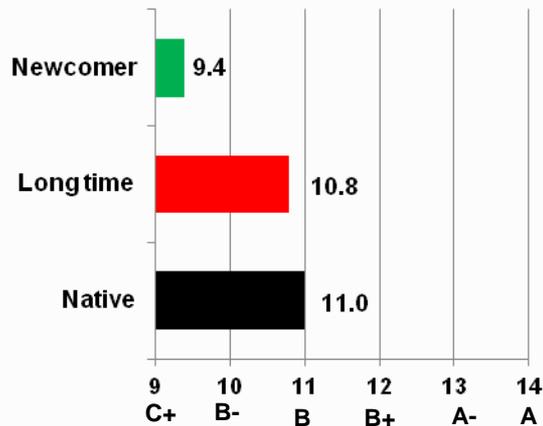
Reputation of the ABC store



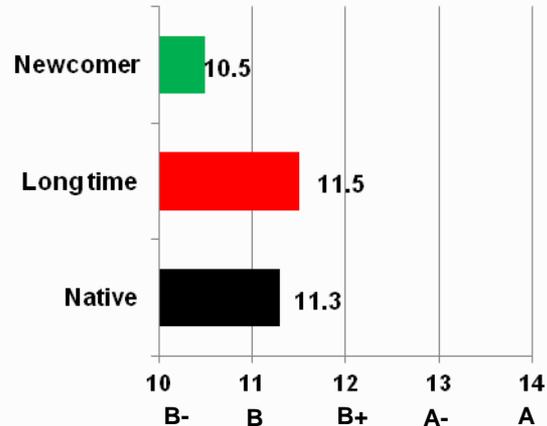
Governance and oversight by the local ABC board



Your local store's community citizenship in promoting public health



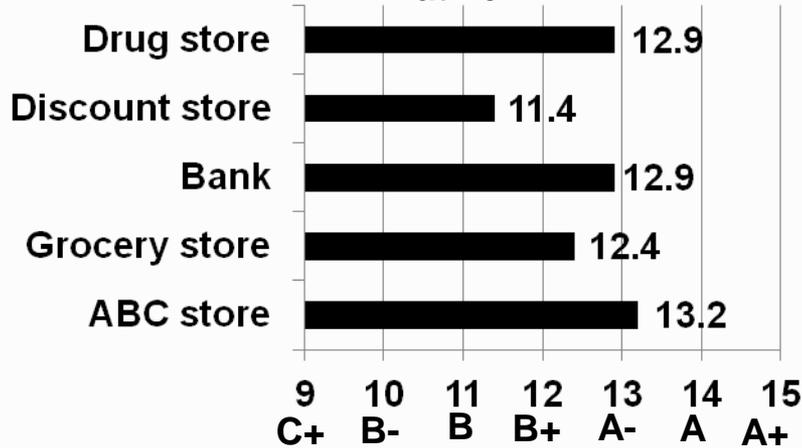
Your local store's community citizenship in promoting public safety



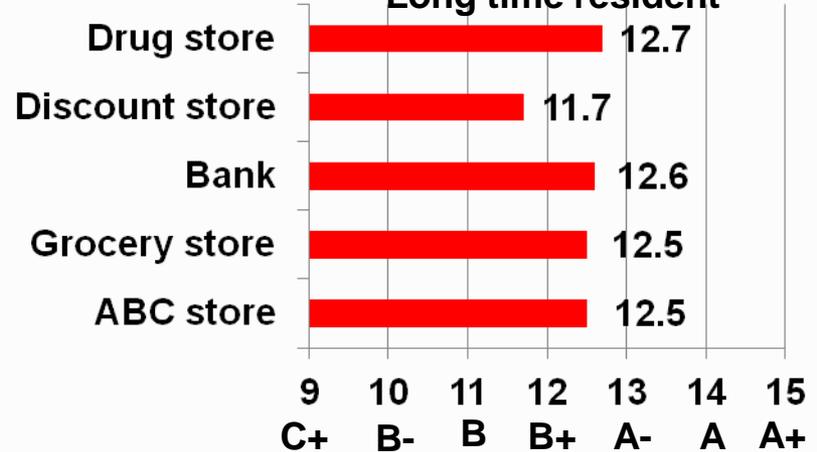
Newcomer customers graded almost all stores lower, including their ABC store.

“What overall grade would you give to your local _____?”

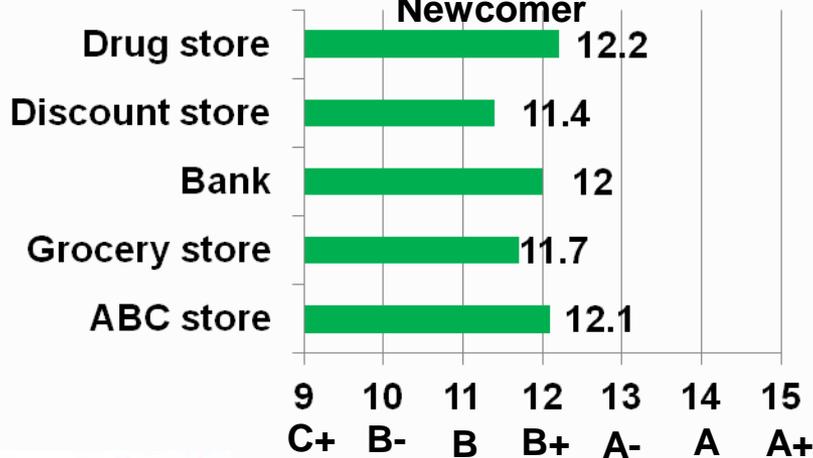
Native



Long time resident

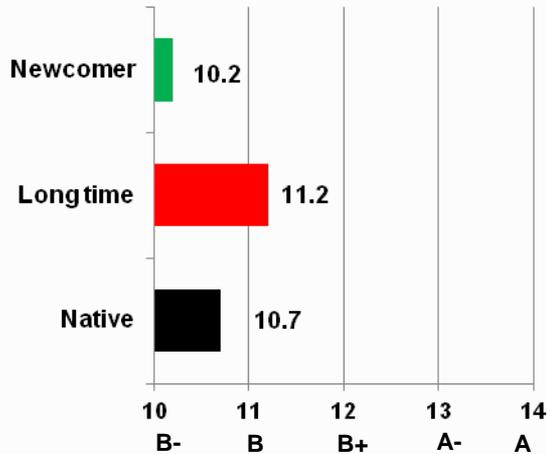


Newcomer

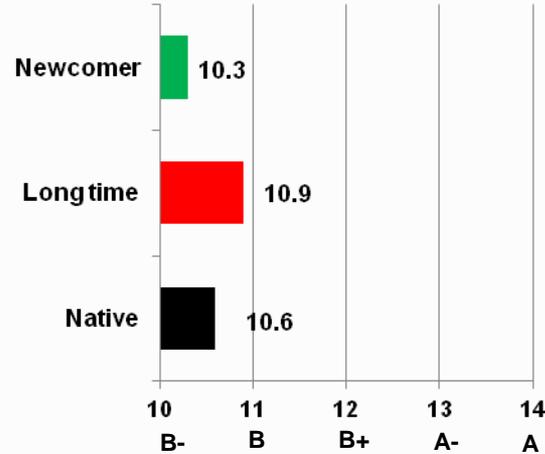


Long time non-customer residents gave store exterior, signage, and parking lot safety higher grades than did other non-customers.

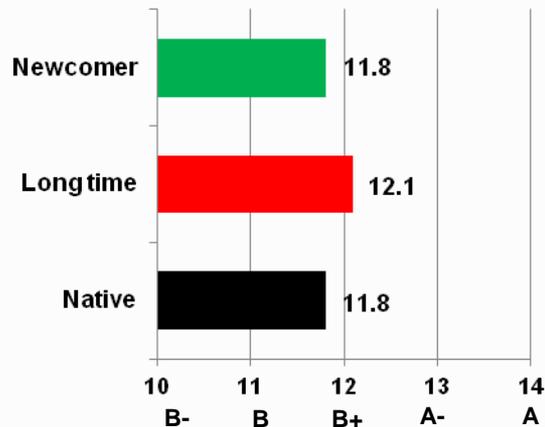
Exterior of the store is welcoming



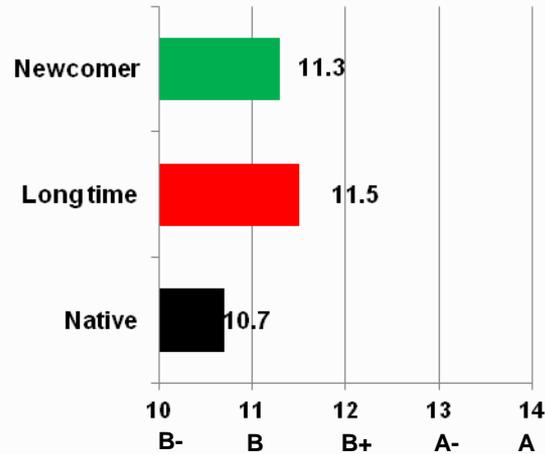
Outside attractiveness of the store



Visibility of outside signs identifying the store

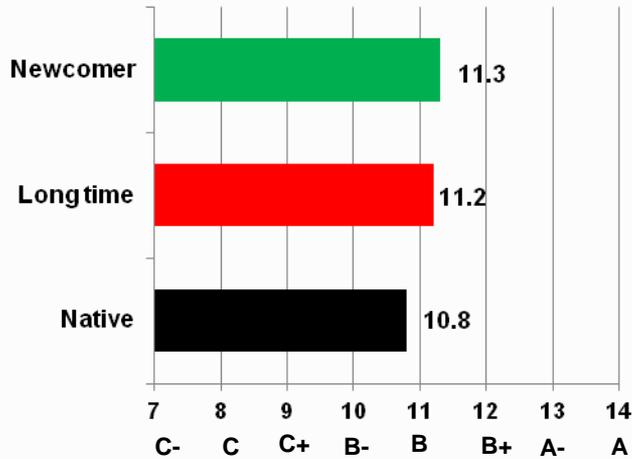


Safety in the store's parking lot

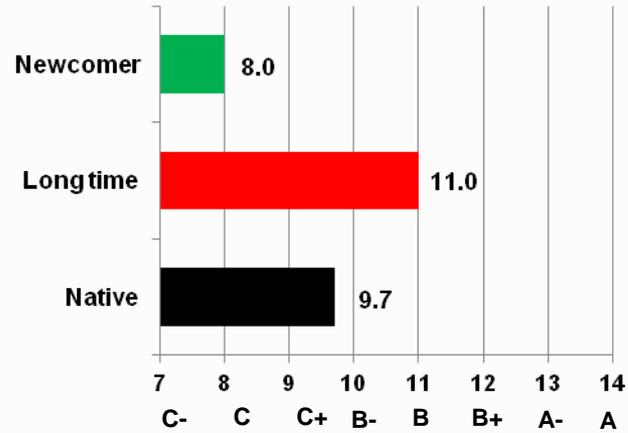


Native NC non-customers with opinions gave lower grades to their ABC store's community citizenship in promoting public health and safety than did newcomers or long time residents.

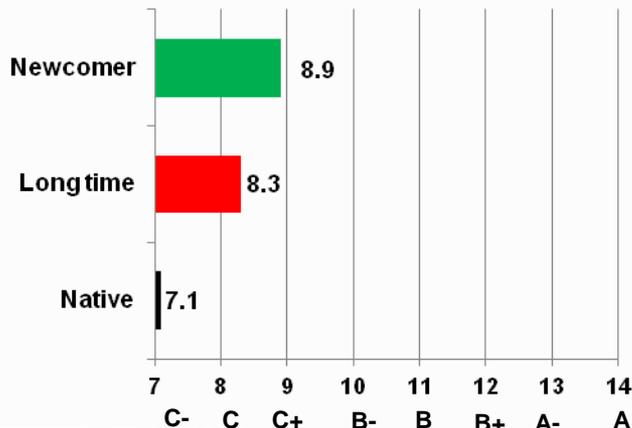
Reputation of the ABC store



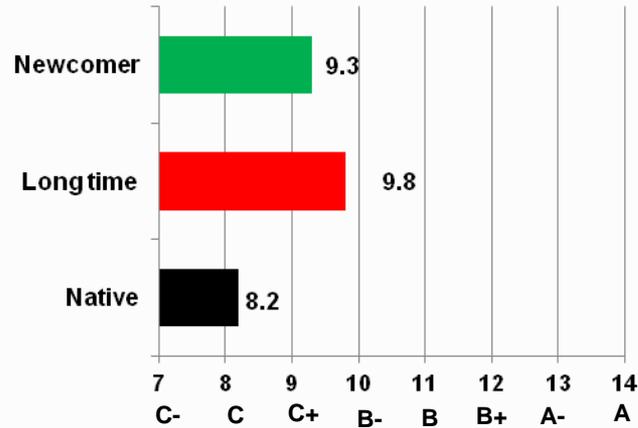
Governance and oversight by the local ABC board



Your local store's community citizenship in promoting public health



Your local store's community citizenship in promoting public safety



Native non-customers graded the ABC store in their community lower overall than did long time residents or newcomers.

“What overall grade would you give to your local _____?”

