

# FASHION RETAIL

## MYSTERY SHOPPING BENCHMARK STUDY UNITED STATES

**BARE**   
INTERNATIONAL  
Revealing the True Nature of Business

The retail journey is about to get very complex. Companies not only need to provide online platforms, they need to blur physical and digital experience.

87% of consumers prefer to buy from brands that are able to personalize experiences the best



Our evaluators visited 44 stores of 10 fashion brands in the US to assess sales performance.

Mystery visits conducted: September 2016

Fashion brands:



Besides the traditional aspects of the sales experience we also addressed how technology is used to attract customers to store, support product presentation or build brand loyalty.

## SCENARIO

Surf on the assigned brand's webpage to evaluate it and to find a fitting store location  
Visit a store to evaluate the physical environment and service based on given aspects

---

## SCORING

There is a score assigned to all questions based on their importance.  
Actual score / maximum available score (min 0 – max 100)

## TOTAL EVALUATION SCORE

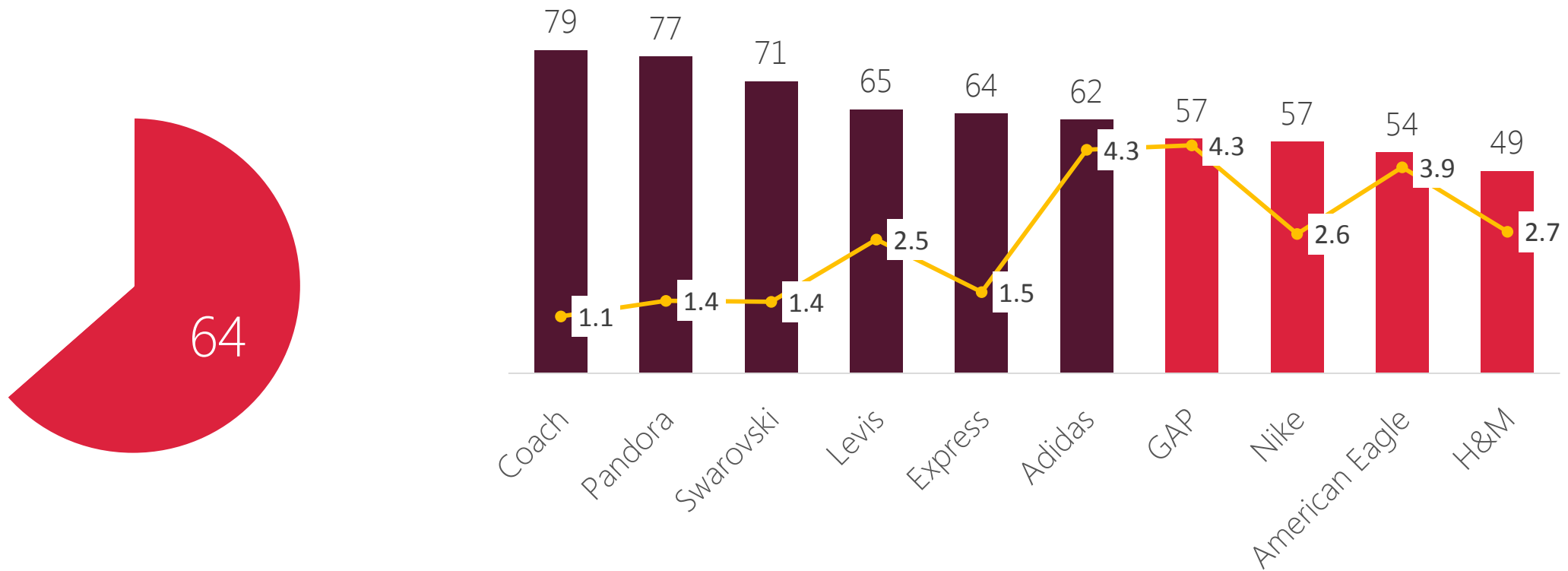
The Evaluation Score is calculated from the scores of the questions covering operational excellence during nine sequential sections of the visit.



The average of the total score of all visits is 64 (out of 100) and even the top performing brands – Coach and Pandora – did not excel in all our evaluation aspects.

■ > 80 ■ 80 - 60 ■ < 60

—●— Average number of customers / sales associate present in the store during the visit

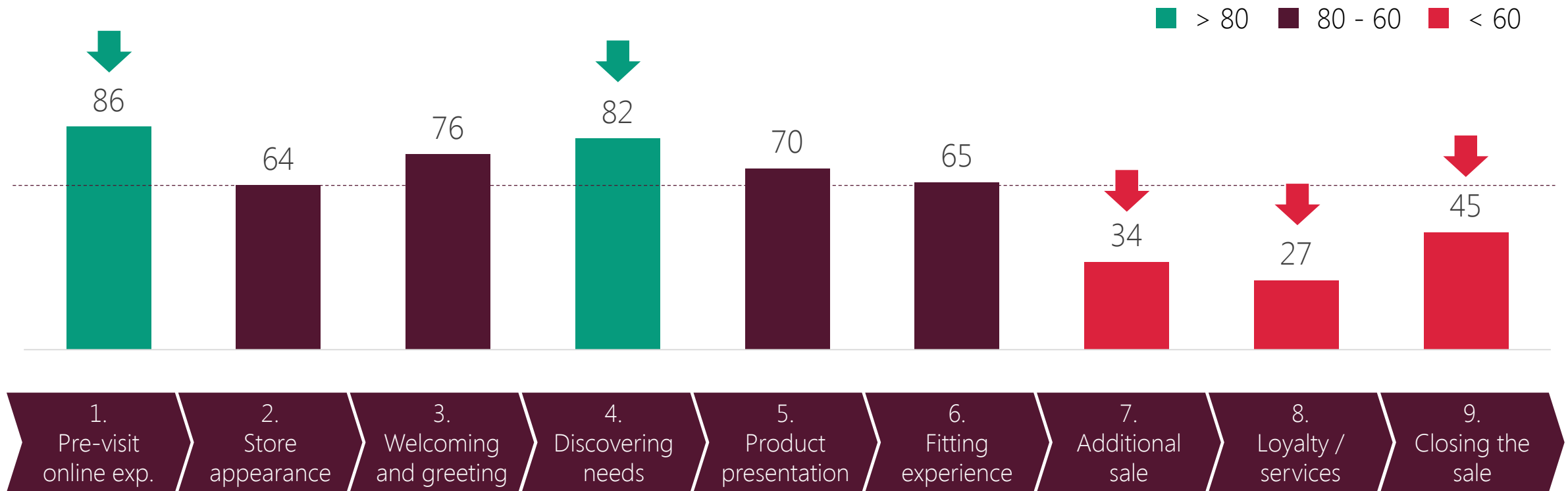


The brands are following rather different strategies when it comes to a mix of applying technology and providing personal assistance.



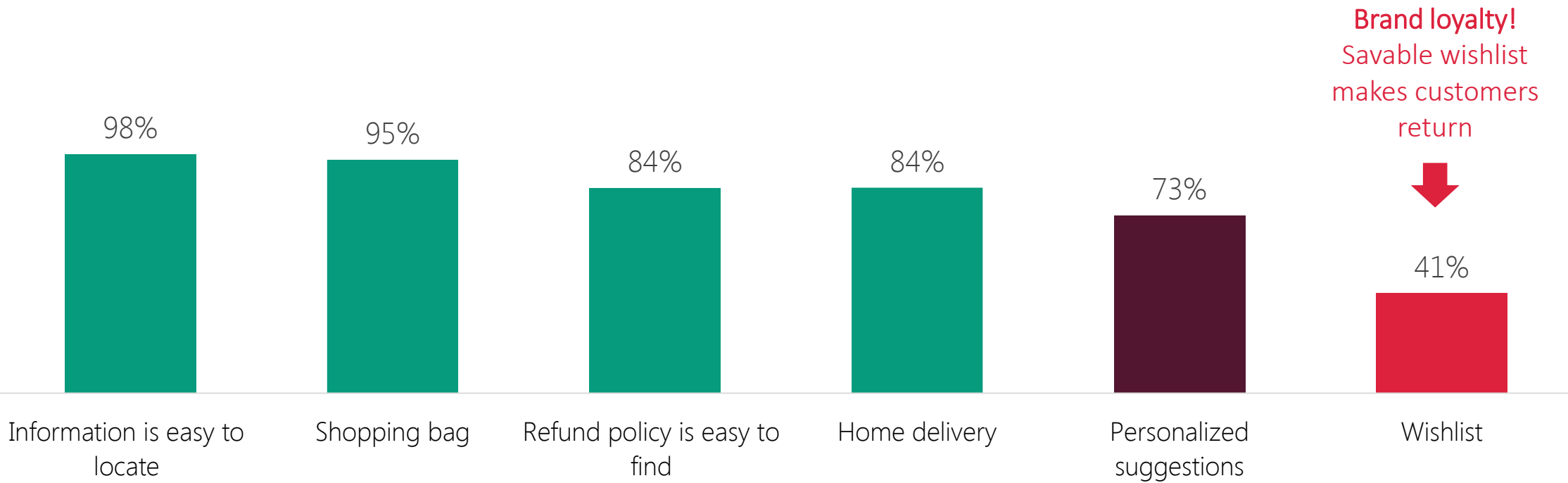
Most stores perform well on their online platforms and in assessing the customers' needs.

However the sales personnel significantly underperforms in recommending additional sales and building brand loyalty / making the customers return to the store with a proper closing.



General information is easy to locate on all websites. The top achievers stand out with more personalized offerings and with connecting online and in-store experience.

■ > 80 ■ 80 - 60 ■ < 60

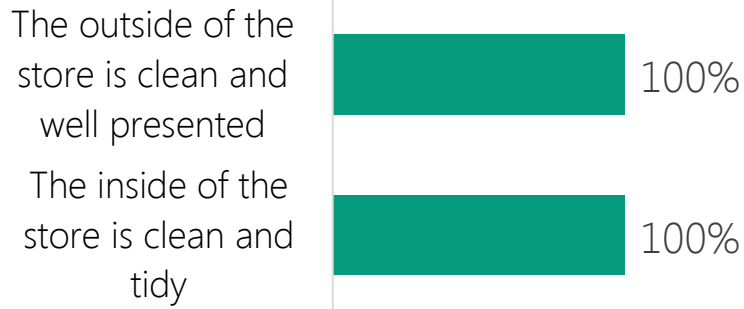




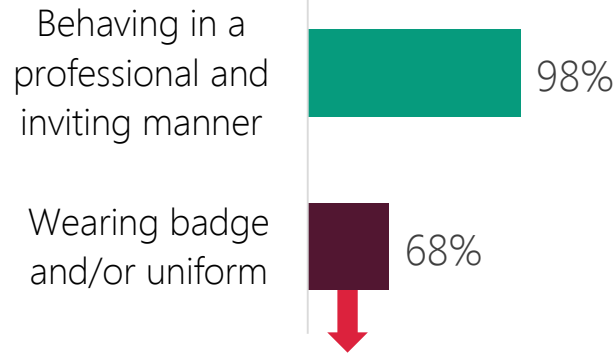
Stores are clean and tidy however sales associates of certain brands are less recognizable. Best performers stand out with applying additional visual tools.

■ > 80 ■ 80 - 60 ■ < 60

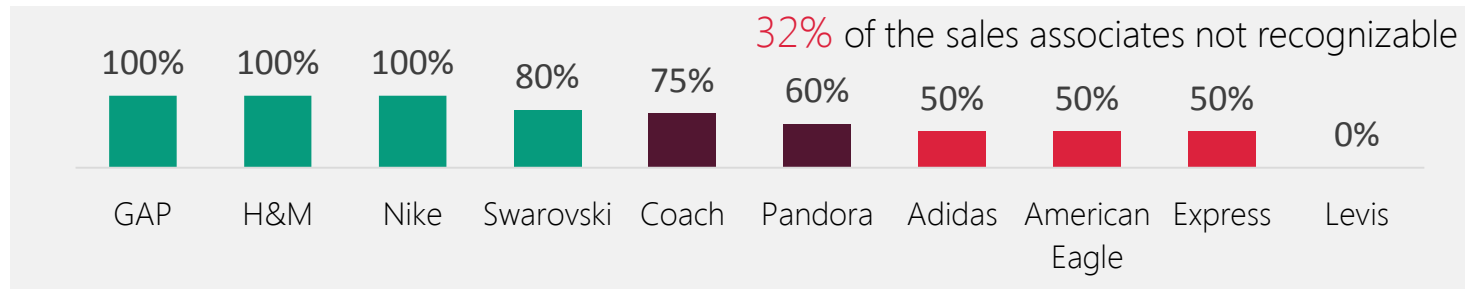
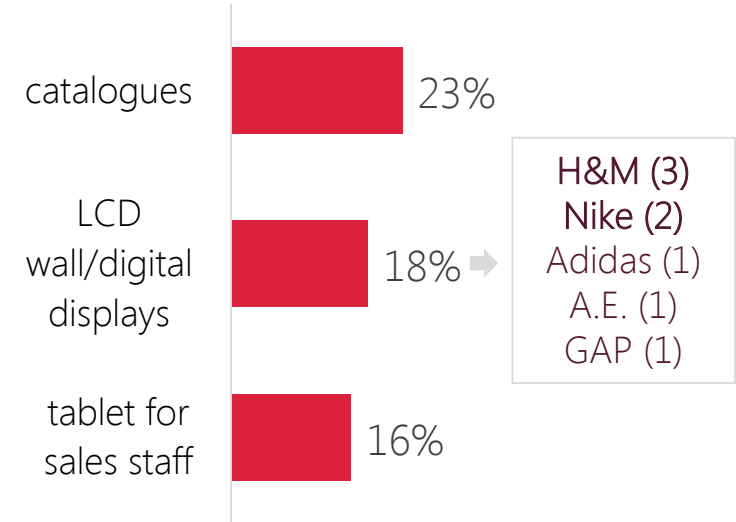
Store tidiness:



Sales personnel:

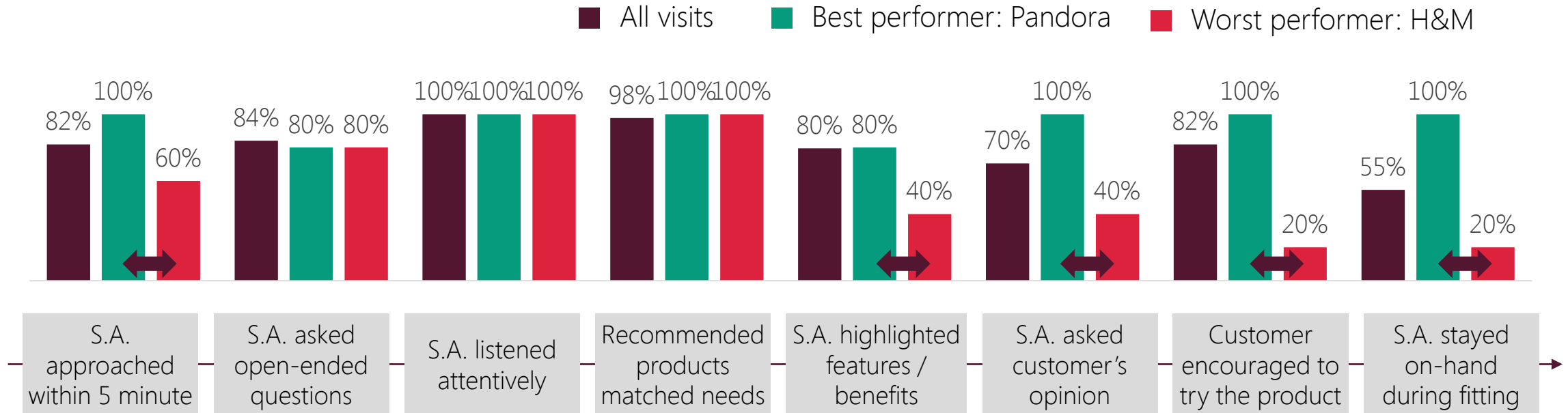


Devices, visualization tools:



Steps of 'traditional sales assistance' are mostly well performed.

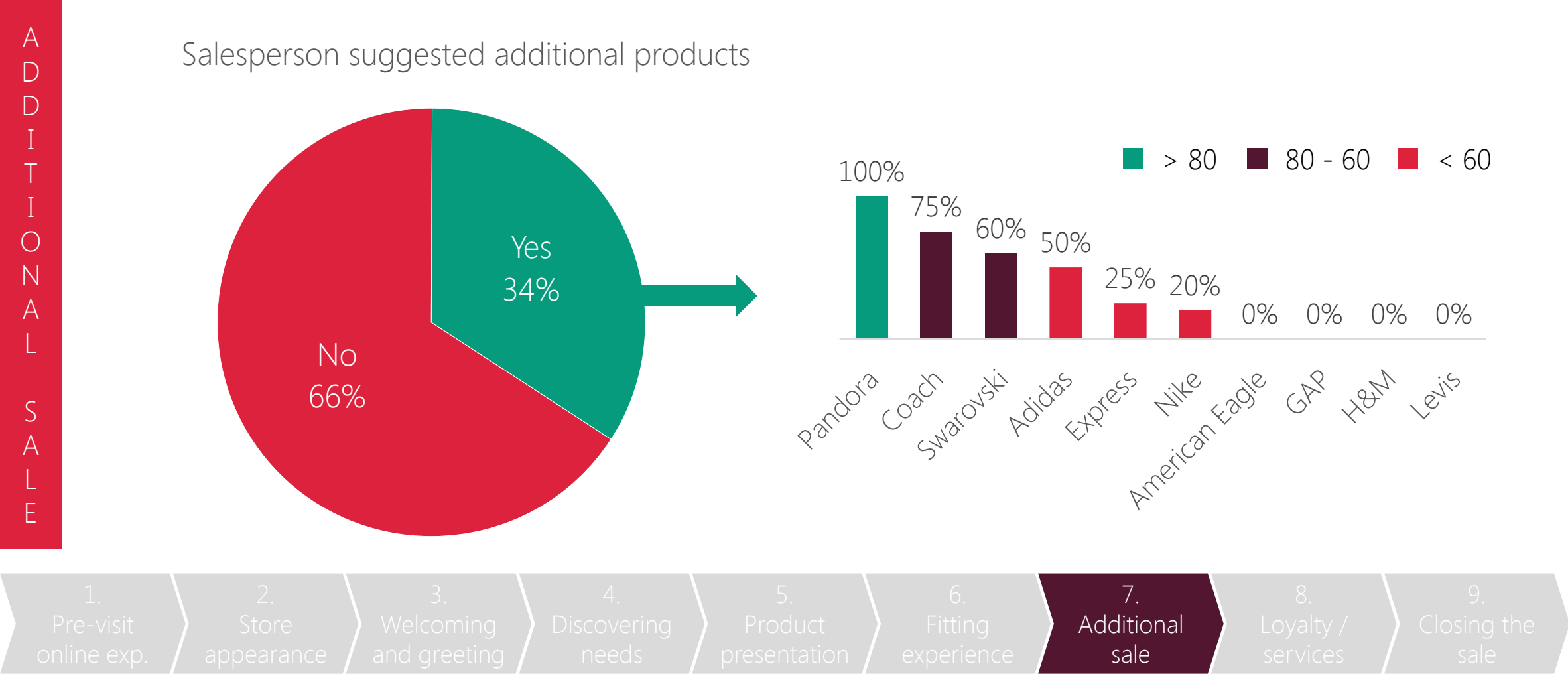
Top brands stand out with proactive help offering, thorough product introduction and more assistance provided during fitting.



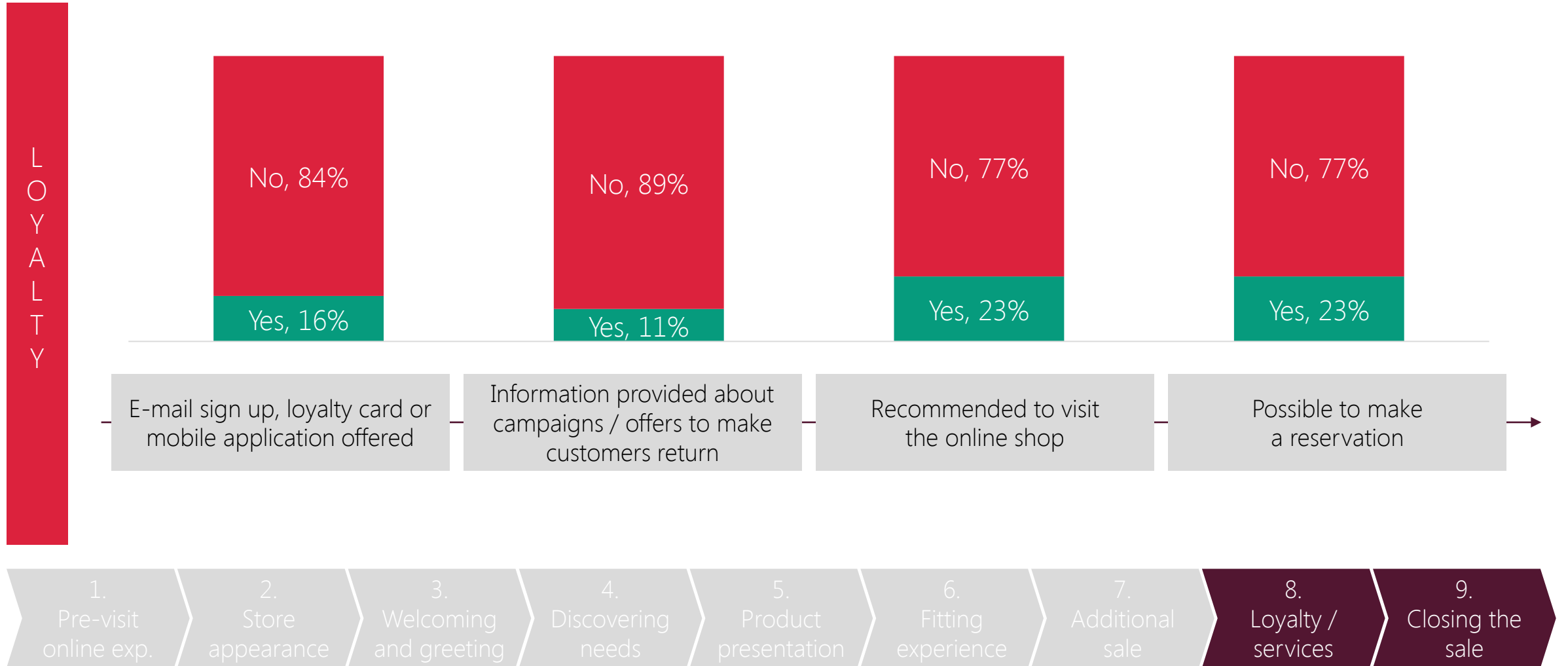
In 36% of the visits (16 visit out of the total 44) all these steps were well performed by the sales personnel



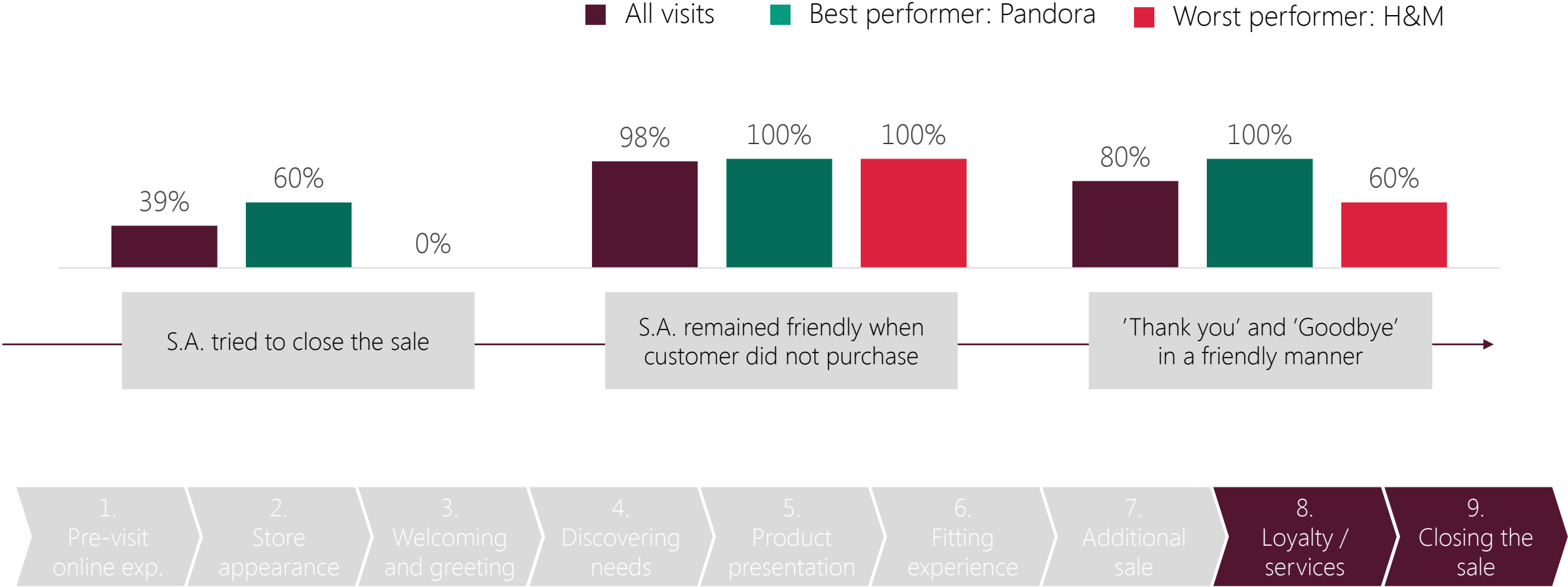
In 66% of the visits the sales associate missed the opportunity to offer any additional products different from the one in the customer's initial request.



The second critical point is building brand loyalty: sales associates miss to take actions that make customers return to the store (either online or brick and mortar) and keep the brand in mind.



At the end of the sales process the sales associates (S.A.) are mostly polite and friendly but not trying to close the sale.



# SUMMARY



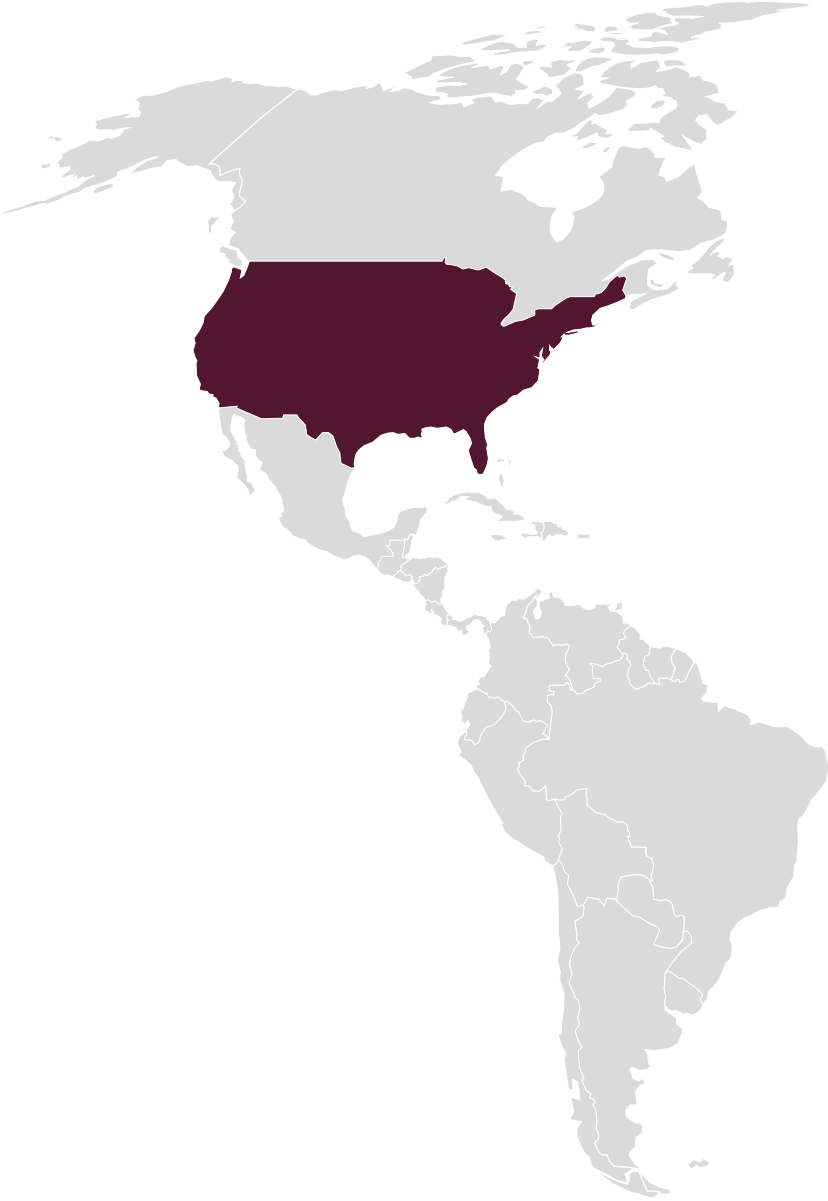
- Webpages are easy to use and informative. However, there is more potential in personalizing offers and making customers return. *Best performer: Coach.*
- Stores are always clean. Sales associates are often difficult to recognize (without badge or uniform). Visualization tools are still not widely used. *Best performers: Nike and H&M.*
- Steps of 'traditional sales assistance' are in general well performed. However, offering help proactively, introducing the products thoroughly and providing assistance during fitting are often neglected. *Best performer: Pandora.*
- **Additional products are offered in only 34% of the sales conversations (with huge differences among brands)! *Best performer: Pandora.***
- **Sales associates are polite but miss to take actions that make customers return to the store (either online or brick and mortar) and keep the brand in mind. *Best performer: Coach.***
- None of the brands excel in all addressed aspects (active personal sales assistance and technology, visuals). Even the best performer brands – Coach and Pandora – have potential to improve their retail performance.

# Appendix

Our evaluators visited 44 stores of 10 fashion brands in the US to assess sales performance.

Mystery visits conducted: September 2016

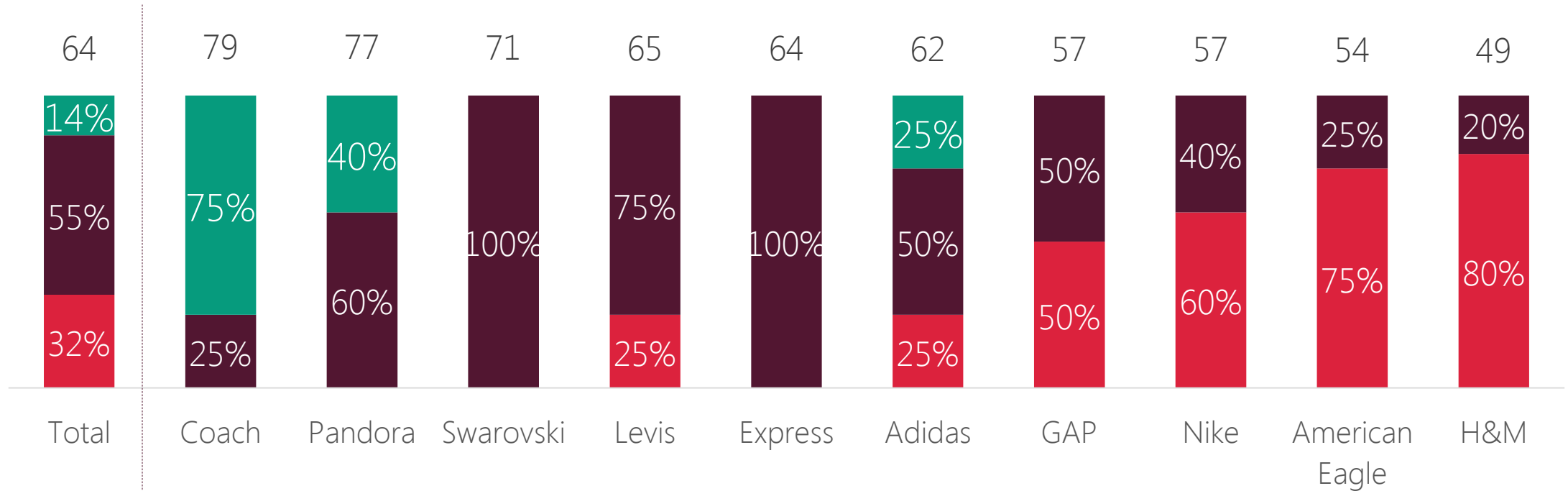
| Brand          | No. of visits |
|----------------|---------------|
| Adidas         | 4             |
| American Eagle | 4             |
| Coach          | 4             |
| Express        | 4             |
| GAP            | 4             |
| H&M            | 5             |
| Levis          | 4             |
| Nike           | 5             |
| Pandora        | 5             |
| Swarovski      | 5             |
| <b>Total</b>   | <b>44</b>     |





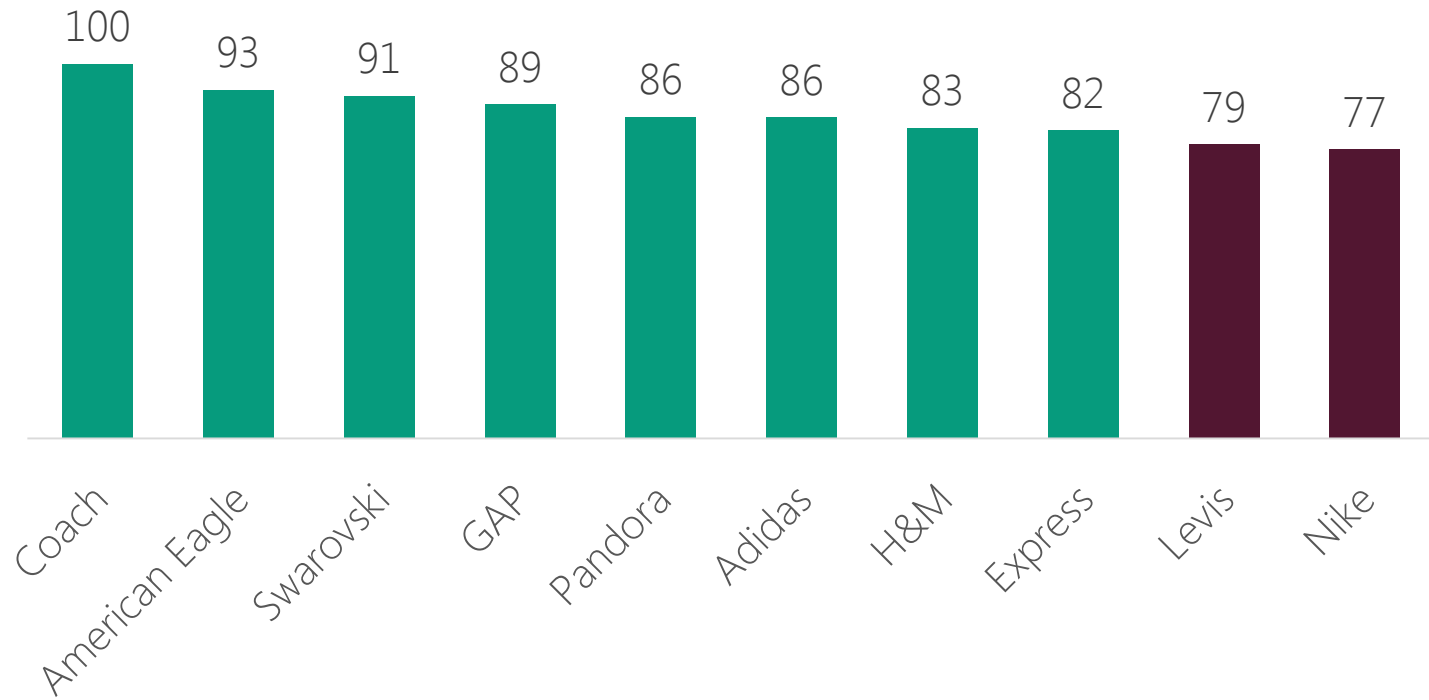
# DISTRIBUTION ON TOTAL EVALUATION SCORE PER BRAND

■ > 80   
 ■ 80 - 60   
 ■ < 60



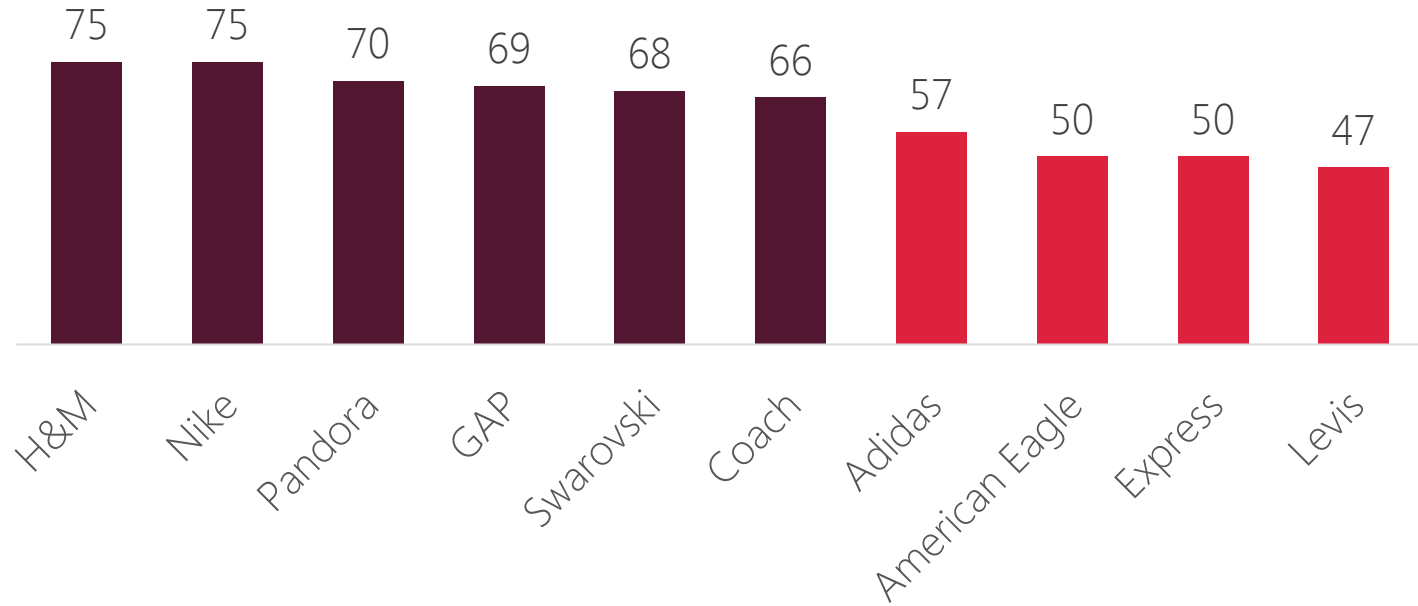
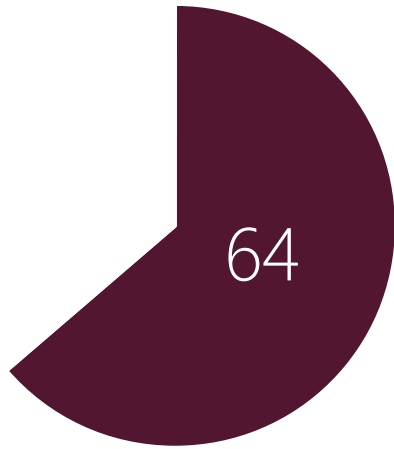
# 1. PRE-VISIT ONLINE EXPERIENCE

■ > 80 ■ 80 - 60 ■ < 60



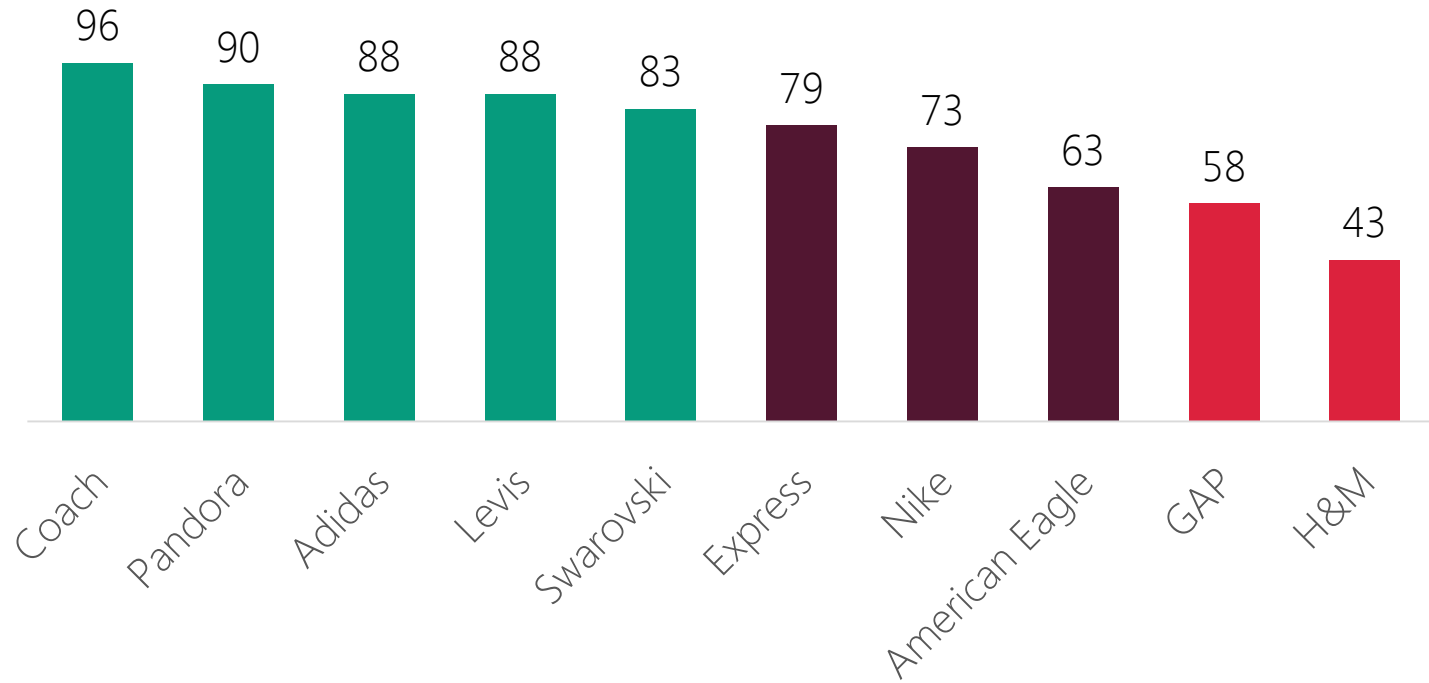
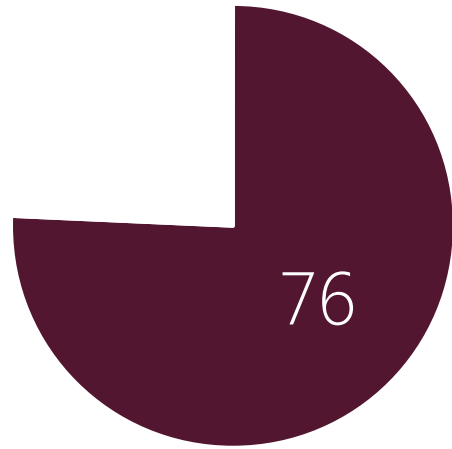
# 2. STORE APPEARANCE

■ > 80 ■ 80 - 60 ■ < 60



# 3. WELCOMING AND GREETING

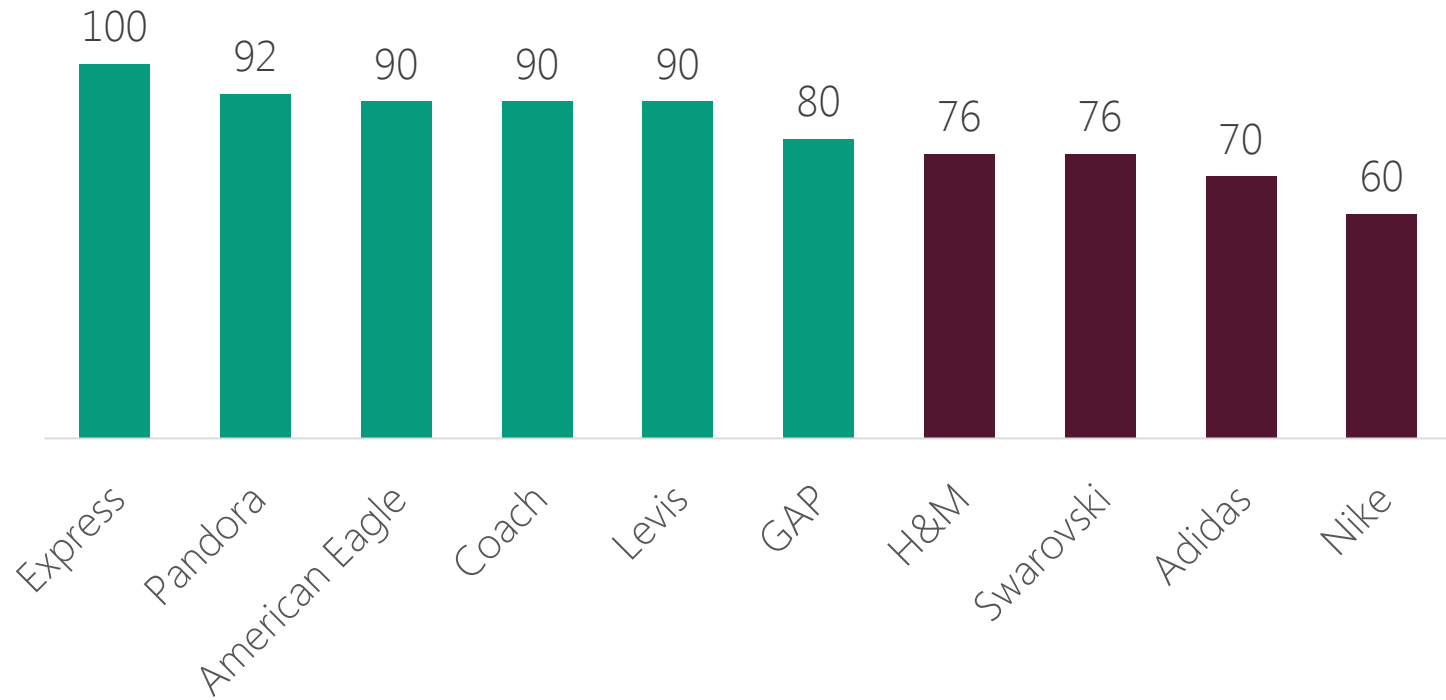
■ > 80 ■ 80 - 60 ■ < 60



# 4. DISCOVERING NEEDS

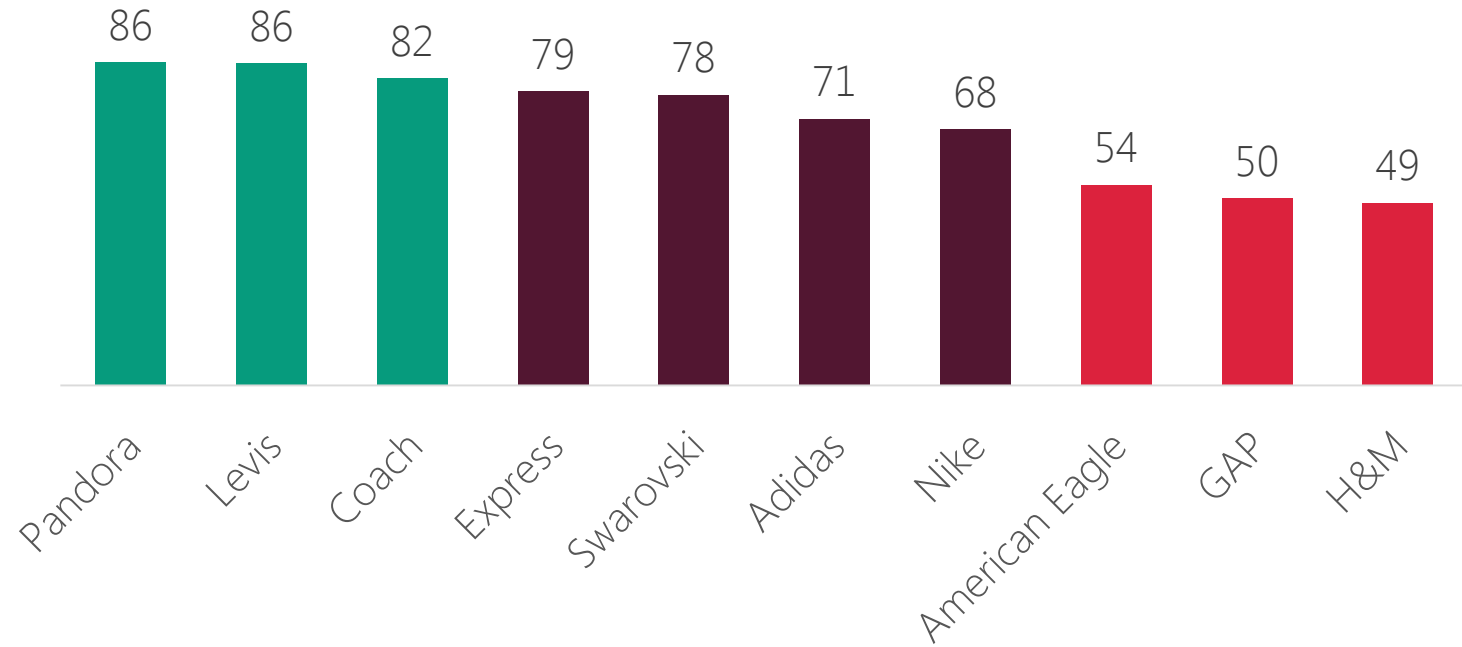
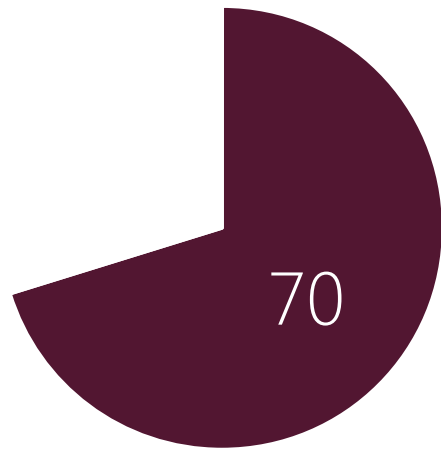
## SECTIONAL SCORES

■ > 80 ■ 80 - 60 ■ < 60



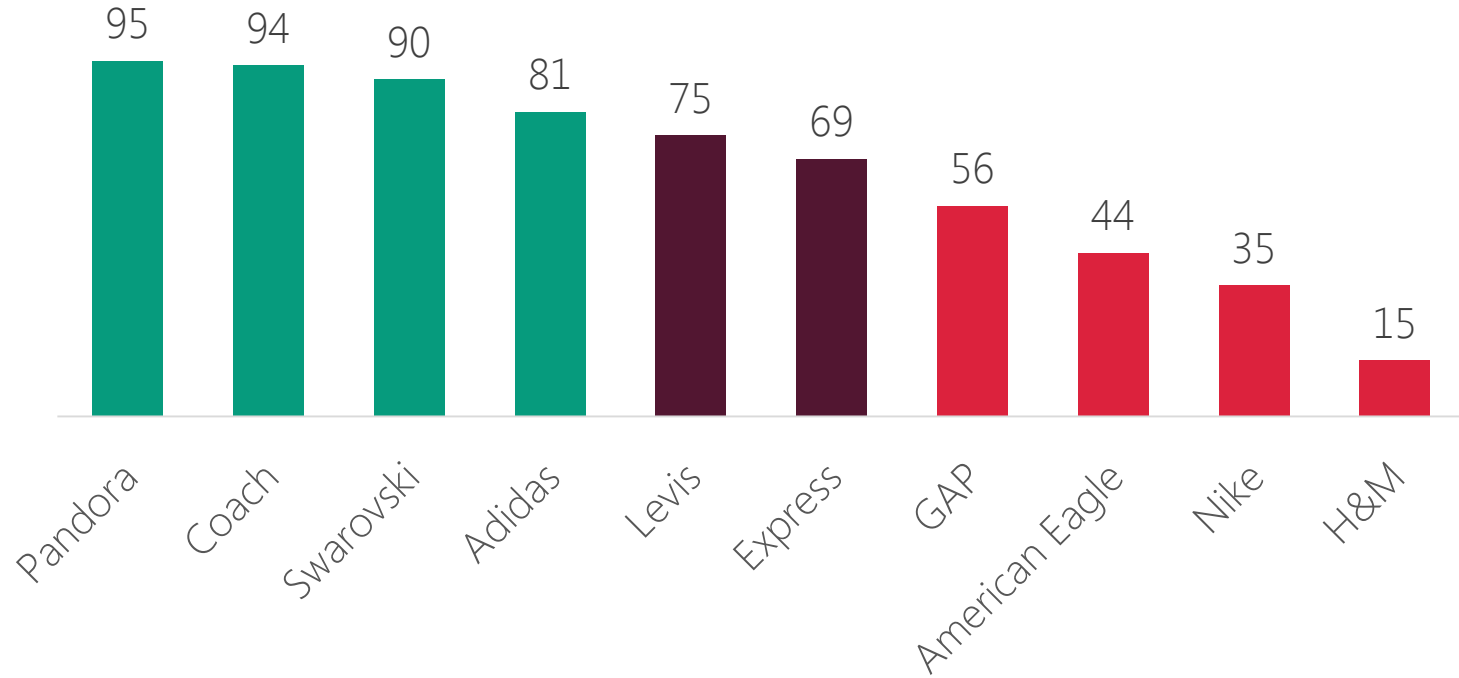
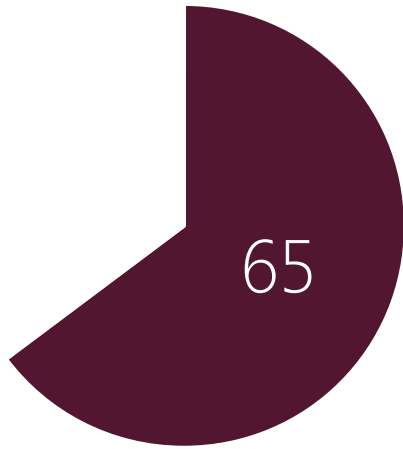
# 5. PRODUCT PRESENTATION

■ > 80 ■ 80 - 60 ■ < 60



# 6. FITTING EXPERIENCE

■ > 80 ■ 80 - 60 ■ < 60

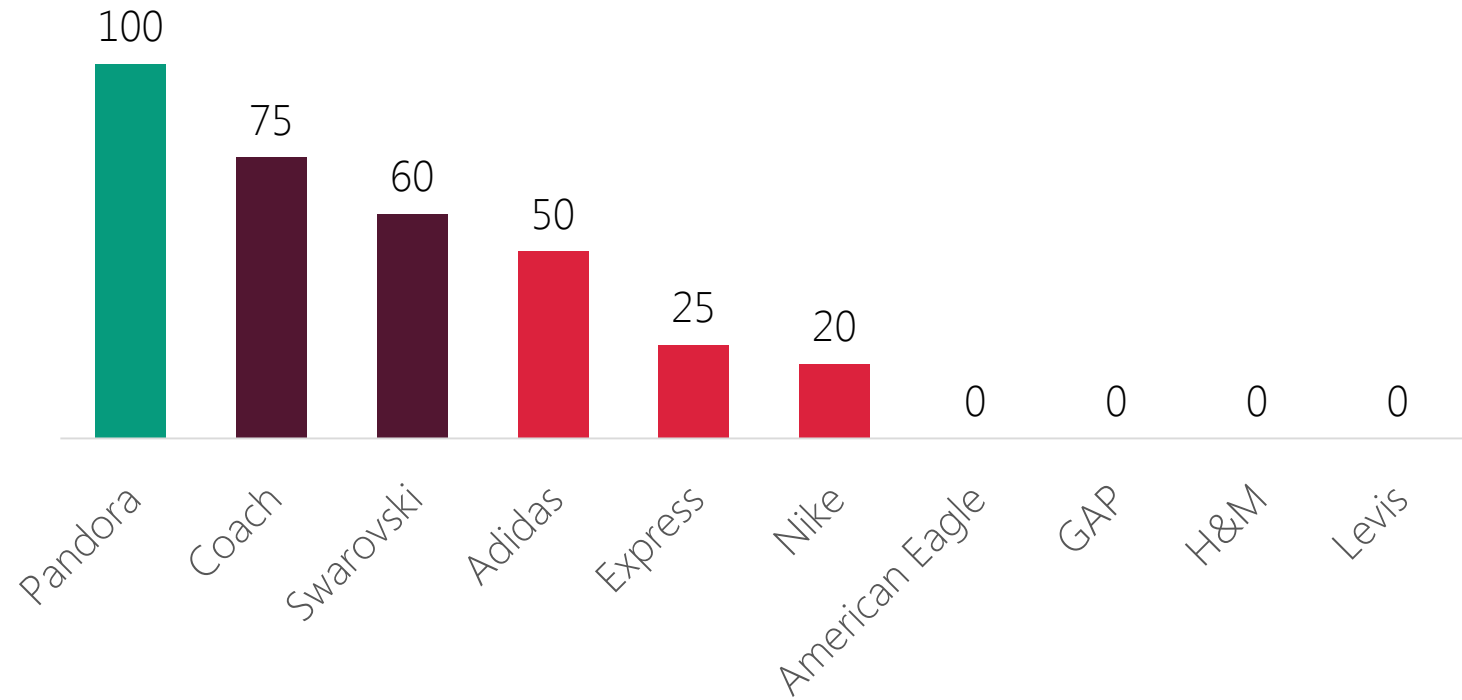


# 7. ADDITIONAL SALE

## SECTIONAL SCORES

Includes only one question:  
Did the salesperson suggest additional products  
(any products that were different from the one in  
your initial request)?

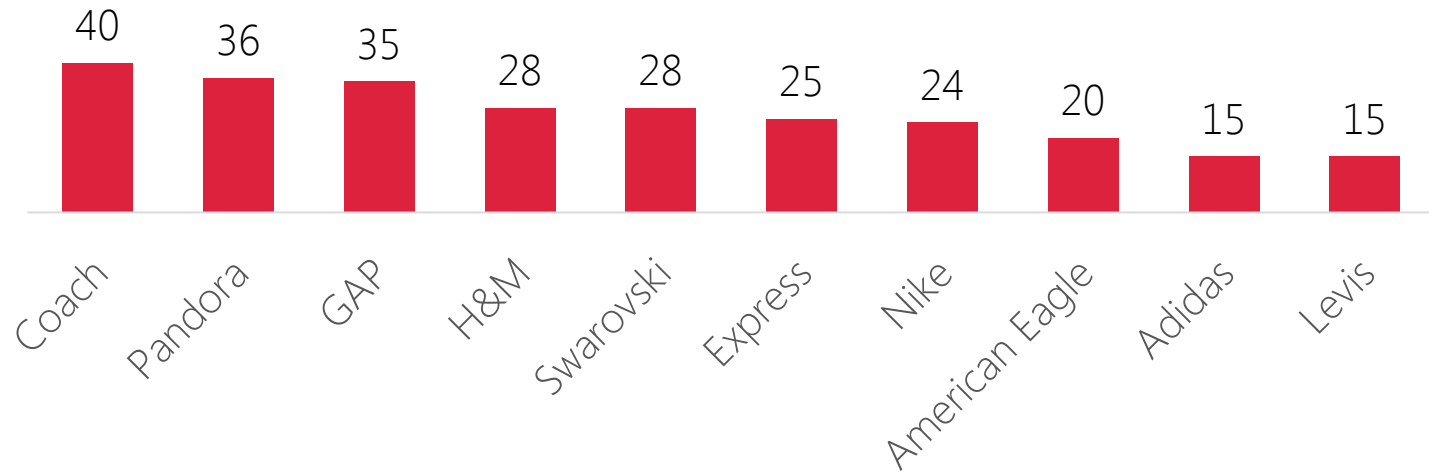
■ > 80 ■ 80 - 60 ■ < 60





# 8. LOYALTY PROGRAM / SERVICES

■ > 80 ■ 80 - 60 ■ < 60



# 9. CLOSING THE SALE

■ > 80 ■ 80 - 60 ■ < 60

