

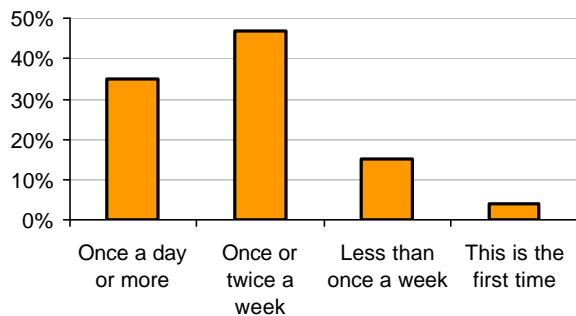


**WHAT WOMEN REALLY WANT!
Reputation Attracts - Experience Retains**

Lila Valencia and Martha Russellⁱ

Clickin interviewed over three thousand American womenⁱⁱ in order to answer the double bonus points question “What do women want?” Store personnel at participating convenience stores invited female shoppers to participate in our survey using the MyC-StoresOnline customer satisfaction store survey tool.ⁱⁱⁱ We asked them to provide information on how often they visit c-stores, what other stores they visit, what items they buy at c-stores, where else they buy those items, and how much they spend. Additionally, we asked them to rate the c-store from which they received the survey invitation on the 10 dimensions of customer satisfaction that are included in NACS Customer Satisfaction Metrics.^{iv} The following represents useful insights to convenience retailers gained from this study focused on women’s wants and needs.^v

Most of the female respondents were frequent c-store visitors and strong spenders. About half (47%) of the women visit the c-store where they received their survey invitation once or twice a week. An additional 35% of these women visit once a day or more.



Almost half (43%) of female shoppers report normally spending more than \$6 per visit, excluding gas. Only 4% report purchasing only gas at c-stores.

Measured by c-store visit frequency and by c-store exclusivity, female customers are more loyal than males. Although women tend to shop more frequently and at more different locations than men, women are loyal to their c-store. They reported more frequent visits to the c-store where they received their survey invitation than to other c-stores, and 18% report rarely visiting other c-stores. Thirty-eight percent (38%) report visiting other c-stores once or twice a week and an additional 29% visit less than once a week.

What can retailers do to cultivate the female customers who are already coming to their stores?

Stocking products women purchase is a necessary but not sufficient offer. Female customers reported shopping at c-stores for a number of categories, ranging from gas to snacks to cigarettes – and for some categories, they reported greater c-store purchases than men. In particular, women more frequently reported shopping for candy, snacks, beer/alcohol, and cigarettes compared to their male counterparts.

The shopping experience is very important. We asked women to share their shopping experience by rating the performance of the c-store where they received the invitation to participate in our survey. They rated these c-stores on the NACS dimensions of customer satisfaction.



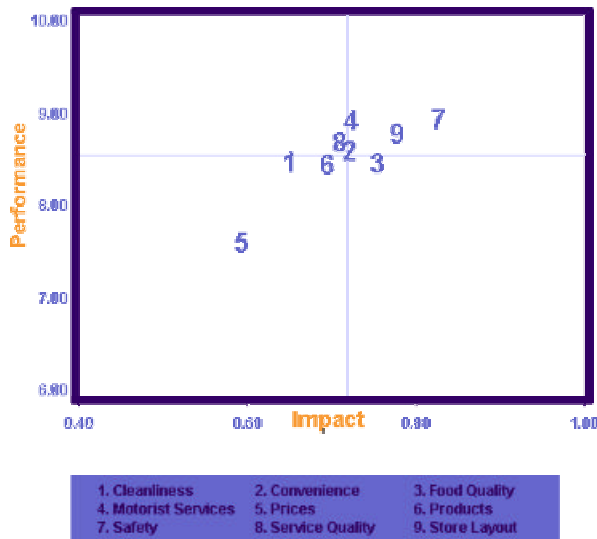
Compared to male customers, women tended across the board to give slightly higher performance ratings. Women gave their c-stores particularly high ratings on safety, motorist services, and store layout. They gave lower ratings on prices, products, food quality, and cleanliness. The loyalty, satisfaction and reputation indices for participating c-stores also received stronger ratings from female customers than from their male counterparts. Female c-store shoppers are more loyal, have a better perception of the reputation (brand), and are likely to be more satisfied with their c-store experience. The high-spending repeat female customers are satisfied with their c-store shopping experience and favor the reputation of their store.



What can retailers do to retain female shoppers and expand business to them?

To turn these satisfaction ratings into action-oriented recommendations, we incorporated the MCSO opportunity analysis method.^{vi} Female shoppers' satisfaction ratings were compared statistically to their overall satisfaction with the c-stores. This comparison allowed us to determine which dimensions of satisfaction, beyond the ratings themselves, have a greater impact on the overall satisfaction of female customers. Findings showed that female shoppers have specific and unique desires and expectations of their c-stores.

By looking at the two quadrants on the right, we were able to identify which drivers of satisfaction are most critical in keeping women customers satisfied with their c-stores. Reading from the right, the most critical areas of performance for women are safety (7), store layout (9), food quality (3), and motorist services (4).



Based on this analysis, Clickin recommends that c-stores maintain their high performance in safety, store layout, and motorist services because these drivers are important to their female customers' overall satisfaction with the store. However, because food quality is also a high impact driver, but one on which performance is lagging, efforts to improve food quality are likely receive a strong positive response from female customers. These findings suggest that female customers will notice improvements in food quality, that those improvements will matter to them, and, in turn, that their overall satisfaction with the c-store will increase because of the improvements in food quality.

What can retailers do to attract more female shoppers?

Females shop more frequently and at more retailers. Therefore, there are more occasions for other retailers to try to attract them to their offers.

The first hurdle to attracting more female shoppers is to offer something they find relevant. Clickin looks to the enthusiastic female shopper to learn what is most relevant to her. From the opportunity matrix, we see that safety, store layout, food quality, and motorist services have the highest impact for women. Retailers who want to attract women should strengthen these relevant offers.

The second hurdle to attracting more female shoppers is to get a reputation for the offer they find relevant. Regular, strong spending female customers give high ratings to the reputation of their store and its chain. The brand (reputation, what the store stands for) matters to female c-store shoppers. A c-store's reputation is defined by what the store does and becomes known for, in the context of other offers in the area. C-store retailers would benefit greatly by reinforcing the reputation and experience needs of their female customers in all product sales and service to first capture a greater share of shopping visits, and then increase the ring size on those visits.

The availability of relevant products and service offerings can be improved. The greatest impact on female customer satisfaction and loyalty is likely to come from improvements in food quality, specifically the quality of food prepared on site, the food sanitation practices, and the freshness of packaged foods.

These findings suggest that females are looking to c-stores to offer them a sort of safe haven shopping environment in which the store layout is appealing, services to maintain their vehicles are available, and the food is fresh.

ⁱ Lila Valencia, Research Manager, and Dr. Martha Russell, President, Clickin Research, Inc. For more information, contact Clickin Research, Inc., 512-236-9161 x.11

ⁱⁱ Most women interviewed were between the ages of 20 – 49; fewer than 35% live alone; annual household income was generally below \$50K, slightly less than their male counterparts.

ⁱⁱⁱ For more information, go to www.mycstores.com.

^{iv} The following are drivers of customer satisfaction: cleanliness, convenience, food quality, motorist services, prices, products, quality of service, safety, and store layout.

^v See NACS 2002 Customer Satisfaction Benchmark for complete results.

^{vi} In this chart, the Y-axis depicts the performance of the c-stores on ten drivers of customer satisfaction and the X-axis the impact these drivers have on the overall satisfaction of the women customers. A store-specific Opportunity Matrix analysis is available for all stores using the MCSO (MyCStoresOnline) tool.