



Presto
MOBILE SURVEYS

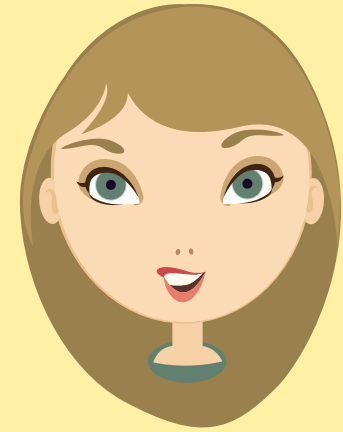
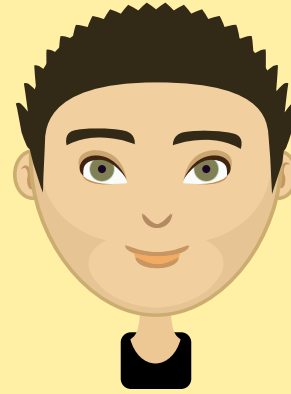
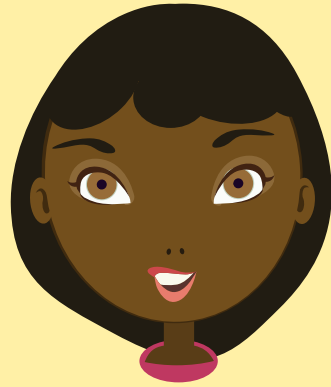
**HOW MAY I HELP YOU:
MEASURING HOSPITALITY
AROUND THE WORLD**



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How often do we greet each other around the world?

One thing that can make or break a shopping experience is customer service. As Jane Austen once said, “First impressions are everything.”



Well, she probably didn’t say that exactly, but very similar. That standard still holds today, and we wanted to know what these first impressions translated to around the world.

Goals

WE SET OUT TO FIND WHICH COUNTRIES REPORTED THE MOST WELCOMING ATTITUDE IN DIFFERENT INDUSTRIES. HERE ARE SOME FACTORS THAT WENT INTO THE REPORT:

SMILING

Did the employee smile at the customer upon entering the establishment?

GREETING

Was the customer greeted by the employee with eye contact? If so, was the customer also greeted with a farewell/closing greeting upon leaving the establishment?

ADD-ON SALES

Was the customer offered any additional product? Did it complement their purchase?



Methodology

MYSTERY SHOPPING PROVIDERS IN 69 COUNTRIES IN ASIA, EUROPE, NORTH AND SOUTH AMERICA CONTRIBUTED DATA FROM MORE THAN 1 MILLION EVALUATIONS OF SMILES, GREETINGS, AND ADD-ON SALES ACROSS A SPECTRUM OF INDUSTRIES.

AFTER DATA WAS GATHERED, MYSTERY SHOPPING PROVIDERS THEN ANALYZED THE DATA, CATEGORIZED IT BY INDUSTRY, AND SENT IT TO BETTER BUSINESS WORLDWIDE, WHO THEN COMPILED IT BY COUNTRY AND INDUSTRY.

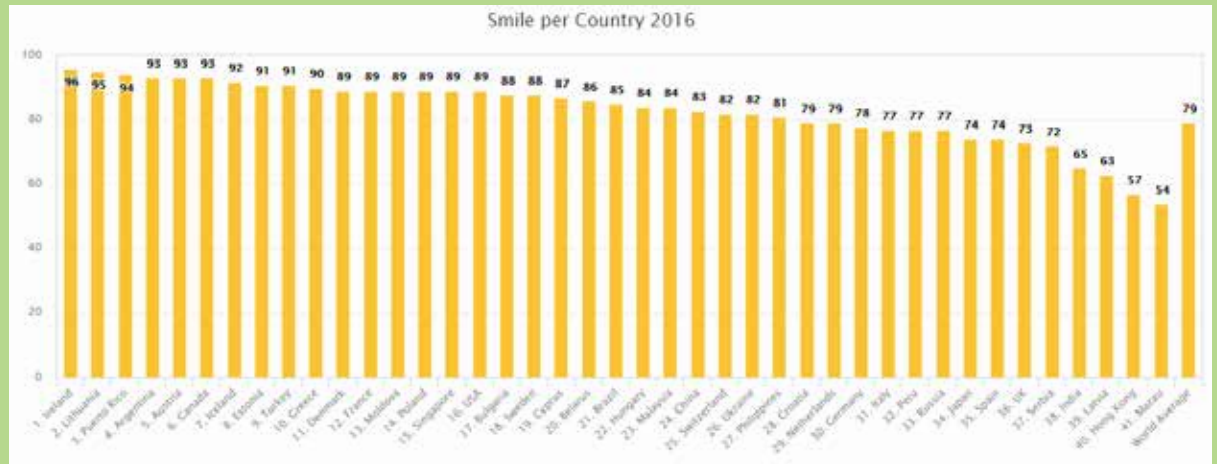
SURFMERCHANTS, USING PRESTO REPORTING TECHNOLOGY, DEVELOPED THE ONLINE REPORTING SUITE, AVAILABLE AT [HTTP://SMILINGREPORT.COM](http://smilingreport.com)



Who Took the Top?



In 2016, Ireland had the highest frequency of smiles at 96%.

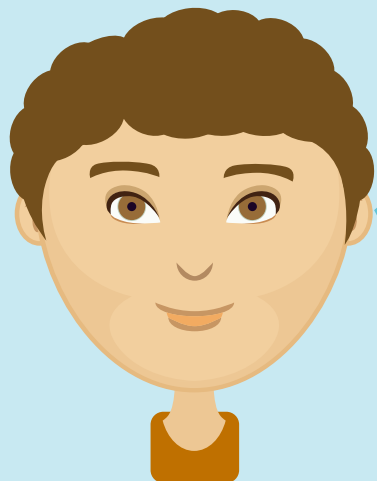


In add-on sales, El Salvador comes in at the top with 99% frequency.





In that same year, 8 **Latin American** countries took the top title for highest frequency of greetings. Colombia, Ecuador, El Salvador, Guatemala, Honduras, Mexico, Panama, and Venezuela all are at the top with a frequency rate of 100%. Great job, Latin America!



iHola!



On the other end, **Hong Kong** and **Macau** are consistently ranked among the lowest in smiles and greetings.

Hong Kong has an average of 59% and Macau 56% frequency in smiles.

In **greetings**, Hong Kong did slightly better with 66%, yet Macau remains the lowest with 64% frequency.

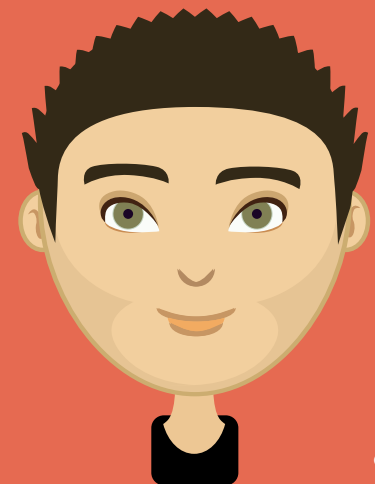
In Hong Kong and Macau, their culture focus less on body language and hospitality and more on what's being sold.

In other words, employees know that what they sell is good, so customers will flock in nonetheless.

In fact, the concept of hospitality is more prevalent among expats than locals.



您好!

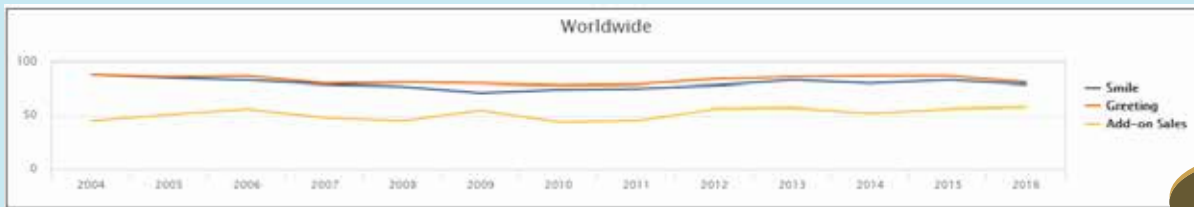
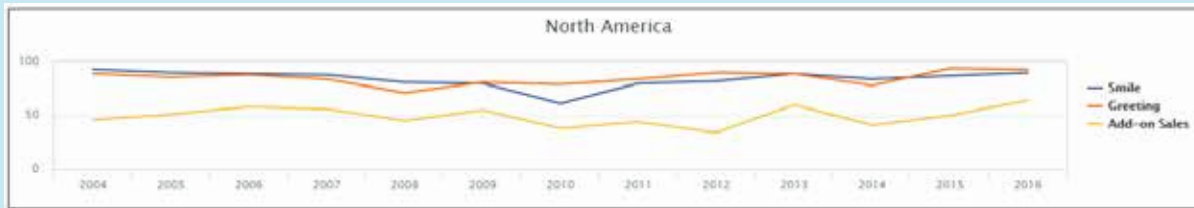


From 2015 through 2016, **North America** consistently had the highest cumulative frequency of smiles and greeting compared to the rest of the world (North America: 87% and 94%, and South America in 2nd place with 84% and 92%).

North America's tendency to take the top may have to do with their culture of smiling.

An article from *The Atlantic* noted that countries with frequent immigration and diversity are much more likely to be seen as "friendly". This may be because immigrants that do not speak their new country's language rely on body language.

Therefore, where a dog would consider showing off teeth as threatening, we would see a toothy smile as friendly and inviting.



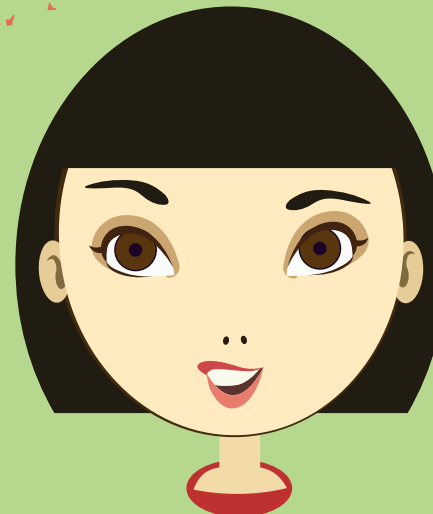
Japan, a country known for making customers their #1 priority, surprisingly ranked in the middle in smiles and greetings (add-on sales were not ranked in Japan), at 73% and 86% respectively.

In Japan, customer service is the most important and thus customers expect only the best service.

Unlike in Hong Kong and Macau, it is within Japanese cultural norms that customers be warmly greeted upon arrival to an establishment.



いらっしゃいませ!



Which Industries Took Top Honors?

HEALTH AND BEAUTY INDUSTRIES CONSISTENTLY RANKED THE HIGHEST FOR SMILING FREQUENCY. GOVERNMENT HAS THE HIGHEST FREQUENCY OF GREETINGS. IN ADD-ON SALES, ALL 8 INDUSTRIES REPORTED SIMILAR FREQUENCIES AND SHOW SIMILAR TRENDS.

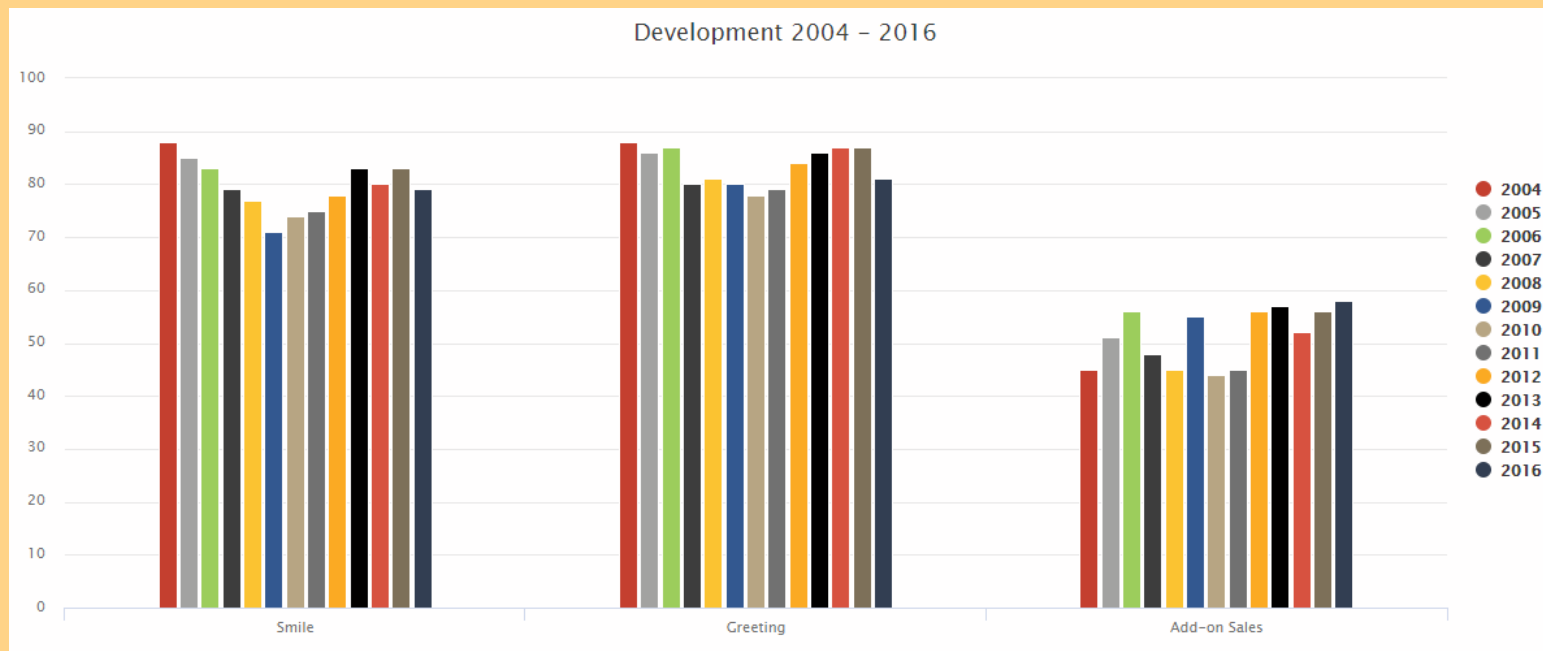


Where Do We See A Dip In Trends?

A downward trend occurred in 2007 at the start of the global recession and was observed in all three categories. These trends were consistent until the end of 2010 and turned around in 2011 as the global economy started to pick up.

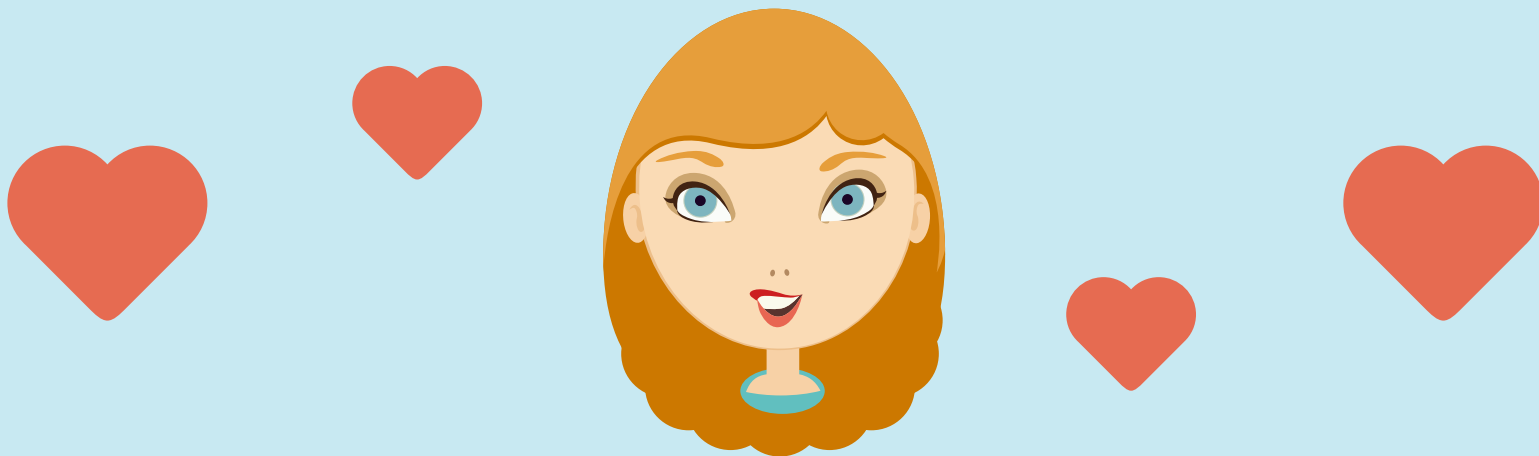
From the Smiling Report's initial start in 2004, the rate of smiles and greetings decreased in 2016.

Interestingly, in that same year, the rate of add-on sales increased slightly.



Which Industries Are The Most Welcoming?

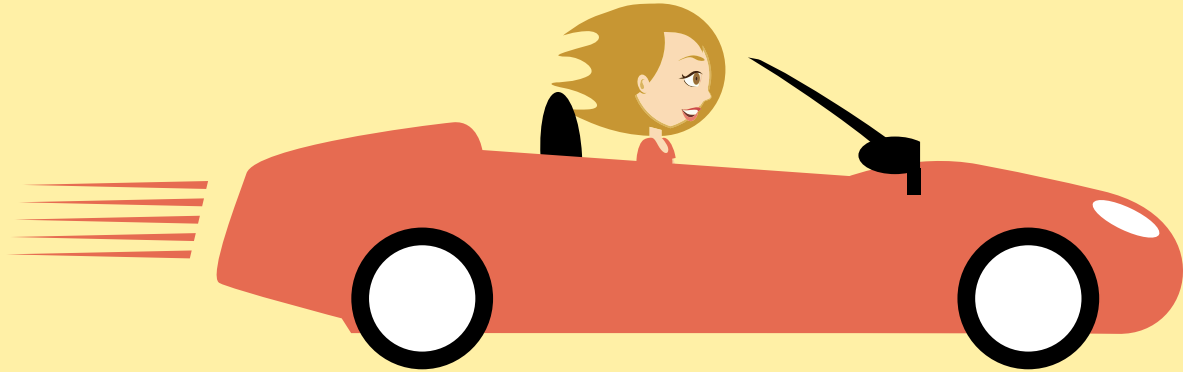
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Smile

Industries	2016	2015	2014	2013	2012	2011	2010	2009	2008	2007	2006	2005	2004	Average
Finance	85	84	84	89	87	74	67	66	76	88	85	90	91	81
Leisure	75	70	66	91	72	80	69	72	85	77	80	78	83	79
Retail stores	78	82	80	82	75	75	77	71	76	81	78	82	87	78
Government	83	81	75	93	64	74	75	74	85	70	88	85	39	77
Transport	58	43	48	69	62	51	61	81	86	57	80	79	64	68
Hospitality	86	88	76	90	85	85	78	86	78	87	92	89	92	86
Health & Beauty Care	89	79	86	90	80	89	63	87	86	83	93	92	92	86
Automotive	82	89	86	86	75	83	68	79	63	87	79	82	93	81
Total Average	79	83	80	83	78	75	74	71	77	79	83	85	88	

GOVERNMENT DOMINATES THE GREETING CATEGORY WITH 94% FREQUENCY. AT LEAST BEING GREETED MIGHT MAKE WAITING AT THE DMV A BIT MORE TOLERABLE?

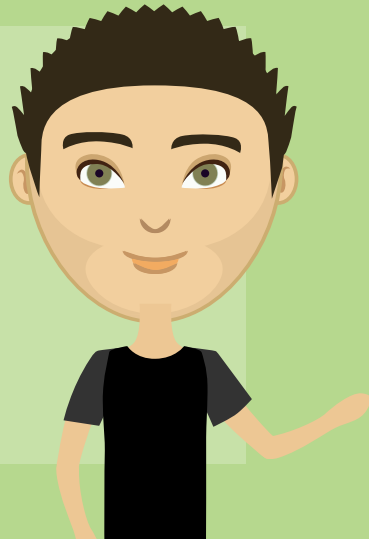


Greeting

Industries	2016	2015	2014	2013	2012	2011	2010	2009	2008	2007	2006	2005	2004	Average
Finance	87	85	90	94	90	76	65	79	76	88	87	91	90	84
Leisure	81	83	73	83	86	86	71	77	90	75	84	88	88	82
Retail stores	79	86	85	84	81	78	82	80	78	78	84	83	85	82
Government	96	94	92	92	85	92	86	88	94	65	93	91	64	89
Transport	77	67	55	83	85	69	77	86	86	79	88	92	87	84
Hospitality	90	92	94	89	90	94	79	80	83	82	90	87	93	88
Health & Beauty Care	74	93	95	92	88	91	84	79	87	83	90	85	89	87
Automotive	85	78	84	87	80	82	81	74	80	88	79	71	80	82
Total Average	81	87	87	86	84	79	78	80	81	80	87	86	88	

HOSPITALITY TAKES THE LEAD IN ADD-ON SALES WITH 58% FREQUENCY, FOLLOWED BY AUTOMOTIVE AT 56%. INTERESTINGLY, THE RETAIL AND LEISURE INDUSTRIES TIE AT 49%.

Would you like to upgrade your room?



Add-on Sales

Industries	2016	2015	2014	2013	2012	2011	2010	2009	2008	2007	2006	2005	2004	Average
Finance	66	60	60	70	57	43	29	46	50	48	48	59	65	53
Leisure	58	72	42	70	42	38	34	37	40	31	51	42	47	49
Retail stores	56	55	48	47	53	43	48	59	43	46	57	48	20	49
Government	53	60	60	66	45	54	26	64	43	3	7	69	13	40
Transport	64	43	57	58	39	44	58	78	60	17	29	28	54	45
Hospitality	63	62	63	77	66	59	43	49	50	58	56	52	62	58
Health & Beauty Care	61	33	60	48	56	36	56	47	41	55	62	61	62	54
Automotive	50	62	60	59	55	64	58	51	64	56	53	43	63	56
Total Average	58	56	52	57	56	45	44	55	45	48	56	51	45	

Who We Are

Based in Boston, **SurfMerchants** has been the leading provider of mystery shopping technology since 1998 with our SASSIE mystery shopping system, used by over 150 mystery shopping and market research companies, and over 3 million mystery shoppers.

Our mobile mystery shopping system **Presto** and **Insta-Shops** debuted in 2014, focusing on data gathering and instantaneous project deployment.

SurfMerchants also publishes **JobSlinger** and **JobSlinger Plus** (mystery shop job board), and **Rover** (mobile audits performed offline).



Contact Us

For more information on the Presto Insta-Shops platform:

To access to the detailed data and reporting on the Smiling Report

To get your own Insta-Shops project started

To find an authorized Presto Preferred Provider to consult and manage your large scale Insta-Shops Project

Please contact us:

Email: contact@prestomobilesurveys.com

Website: <http://insta.prestomobilesurveys.com>

Phone: 508-930-5124

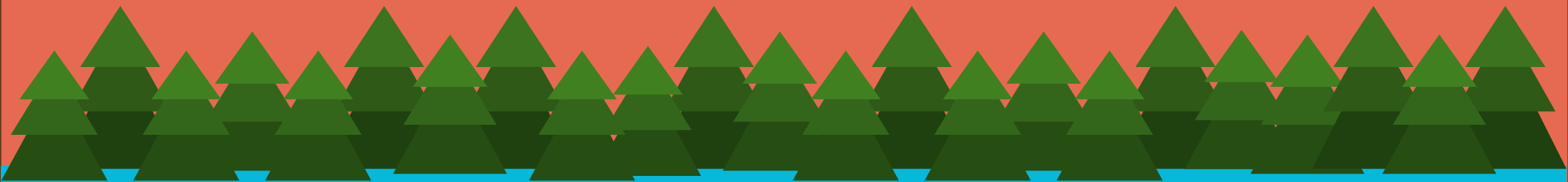
(Tony Felos, Presto Insta-Shops sales)

For full information about the Smiling Report, please visit smilingreport.com.

[Click here to see the Smiling Report Infographic.](#)



Have you smiled
at anyone today?



 **Presto**
MOBILE SURVEYS