

COVID-19 perspective Italy

Do you feel safe out and about?

MSPA Survey • 3rd August, 2020



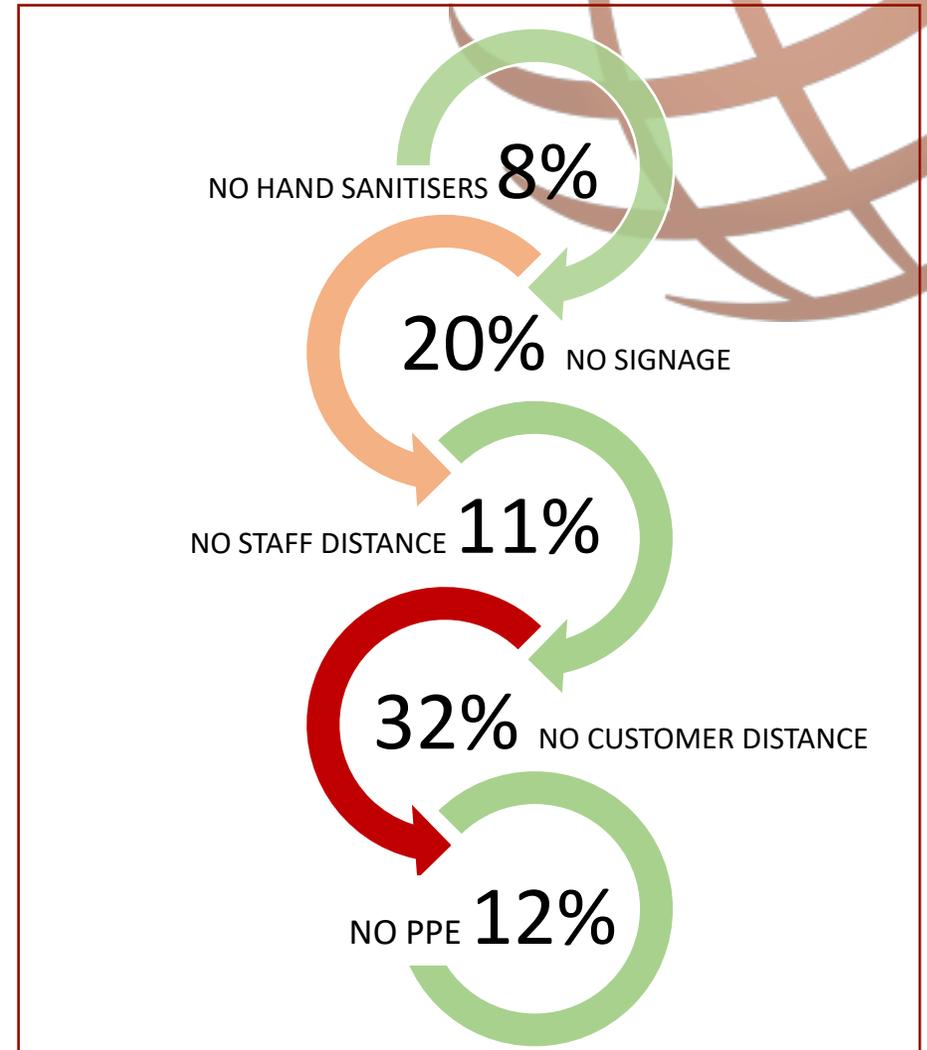
Background



- The MSPA Europe Africa conducted surveys amongst members of the general public about their experiences when out shopping, dining and going about their daily lives, over two weeks from 7th to 21st July
- 84 interactions were assessed in Italy based on the principles of COVID-19 prevention of transmission:-
 - Sanitisation
 - Signage
 - Social distancing
 - PPE
- Respondents were asked about their feeling of safety to complete the transaction and likelihood to recommend the place they visited
- The findings show real gaps in best practice with a potential impact on national health and a real impact on consumer confidence and advocacy
- We need to mind the gaps!

Mind the Gaps... what are we missing in Italy?

- The answer is pretty much every where...
- Was **SANITISATION** equipment available to you? (gels, sprays, dispensers) – **9 out of 10 times**
- Was clear **SIGNAGE** regarding social distancing on display? – **over 8 out of 10 times**
- Was **SOCIAL DISTANCE** observed by the **STAFF** in location? – **9 out of 10 times**
- Was **SOCIAL DISTANCE** observed by the **CUSTOMERS** in location? – **7 out of 10 times**
- Did staff have **PERSONAL PROTECTION OR SCREENS** to prevent infection? - **9 out of 10 times**



Mind the Gaps... what does this mean?

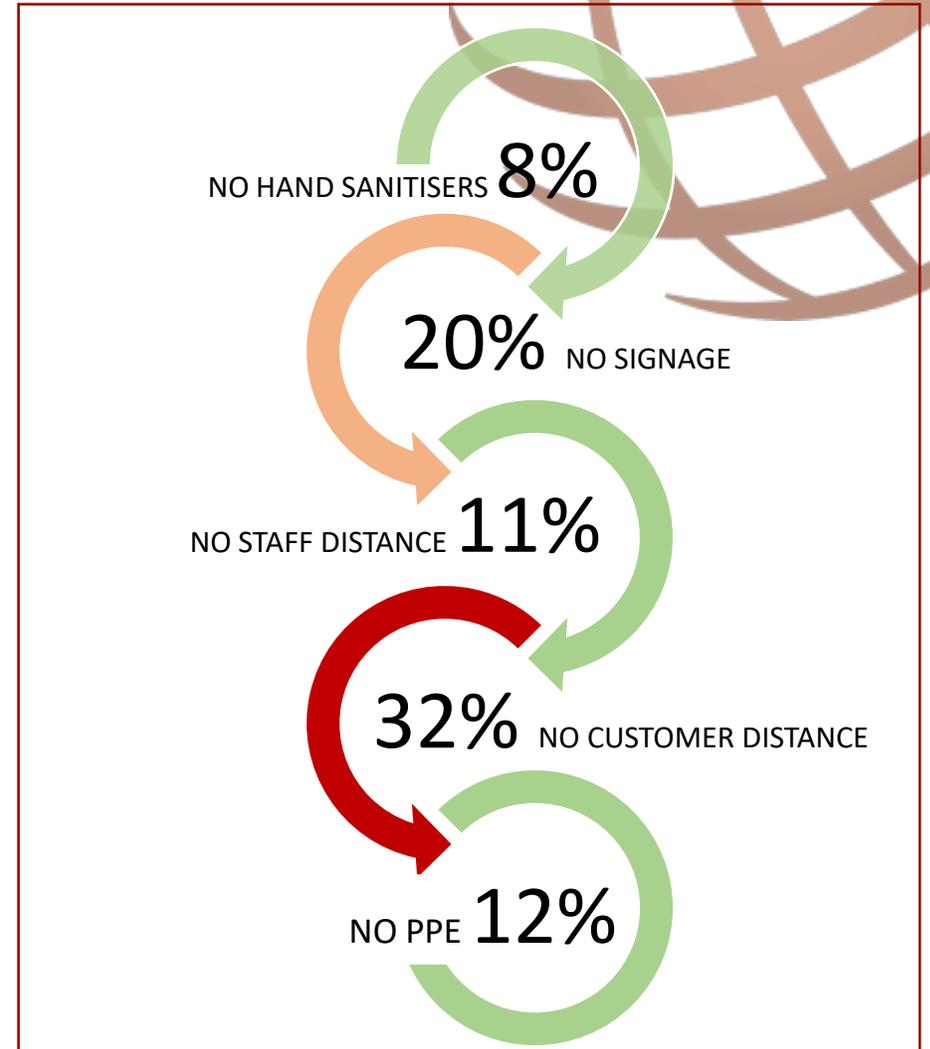
Gaps in our collective ability to observe the hygiene factors required there will be an inevitable impact on our health and our economy.

11% of customers said they actually felt unsafe to complete their transaction

That means almost 1 in 10 revenue is potentially lost...

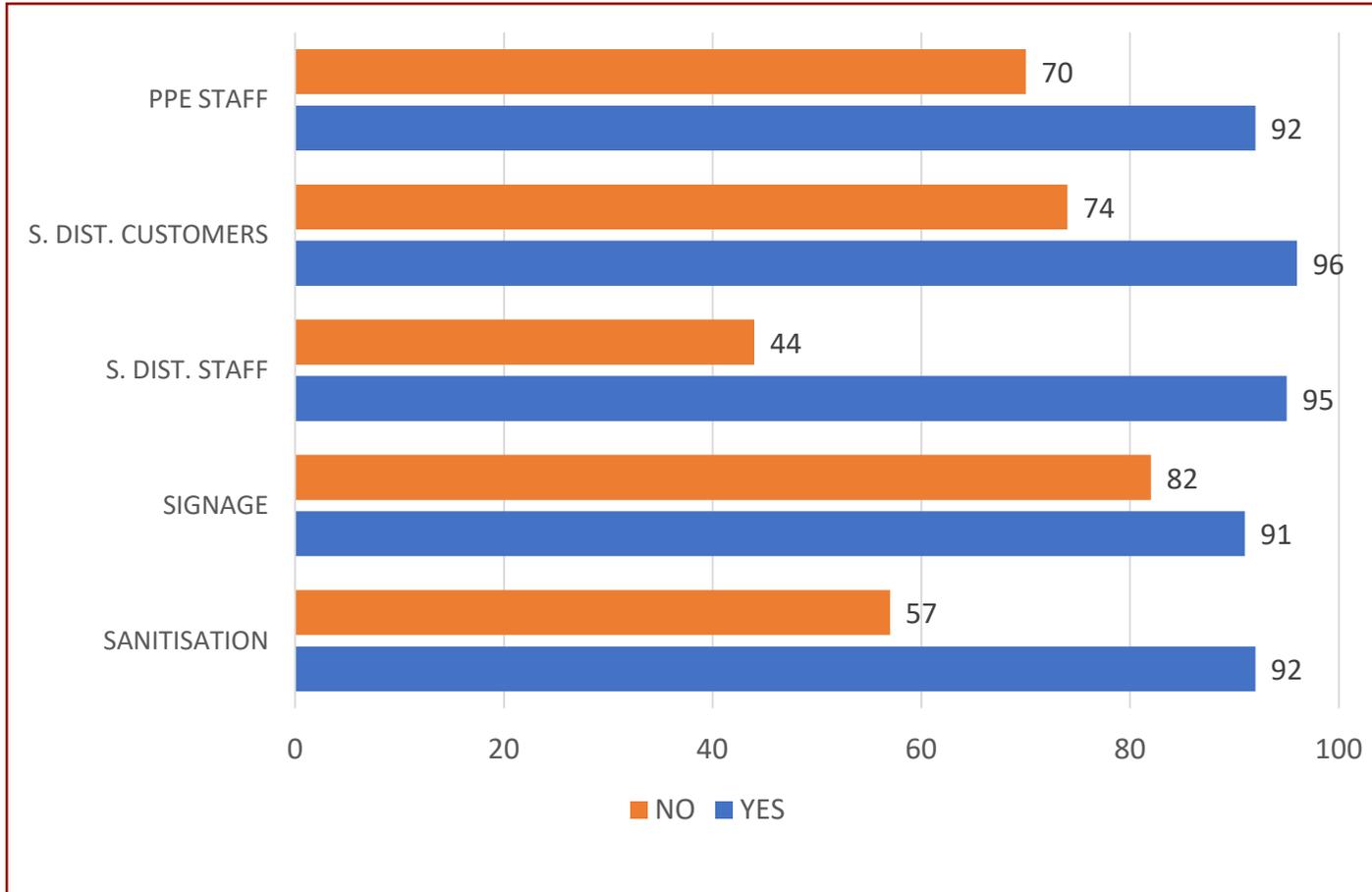
The recommendation rate is 8.4 out of 10!

On the surface this seems okay, but have we all missed an opportunity to make a good impression as we come out of lockdown?



But what is more important in terms of safety perception?

How do each of the 5 safety measures impact how customers feel about safety? The graph bar shows perception of safety when the safety measure exists (blue bar), vs when it does not (orange bar).



There is a clear indication that Staff keeping a distance and Sanitisation have the most impact on perception of safety with a gap in perception of over 51 and 35 points respectively between when it does exist to when it does not.

The gaps show all elements are important with Sanitisation and Staff Socially Distancing important:-

Sanitisation: 35

Signage: 9

Social Distance STAFF: 51

Social Distance CUSTOMERS: 21

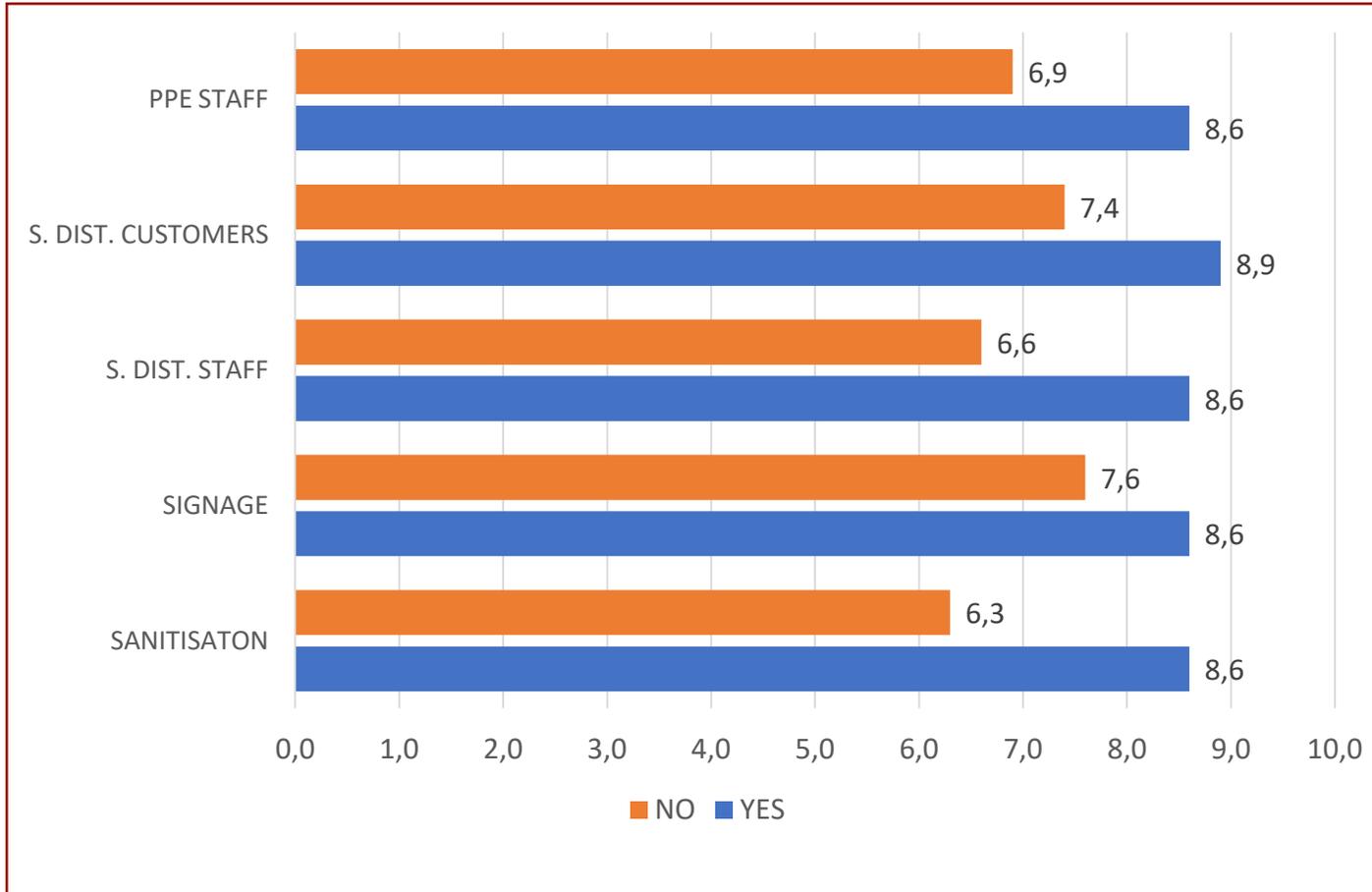
PPE STAFF: 22

These are directly in the control of businesses and efforts must be increased to ensure customers feel safe.

COMMENTARY

But what drives customer recommendation most?

How do each of the 5 safety measures impact how likely customers are to recommend? The graph bar shows perception of safety when the safety measure exists (blue bar), vs when it does not (orange bar).



Interestingly, the impact of these measures on recommendation is matches that with feeling safe. Minding the gap (in marks out of 10) between fulfilling or not each criteria shows sanitisation availability is paramount:

Sanitisation: 2,3

Signage: 1,0

Social Distance STAFF: 2,0

Social Distance CUSTOMERS: 1,5

PPE STAFF: 1,7

COMMENTARY

What the people say!

From the mouths of customers

High scores:



"All in all I felt quite confident; the staff respected all safety and hygiene rules, only some customers did not respect distances. I had the impression of a clean and customer-friendly supermarket."

"Place not too crowded; members of the staff wearing masks; hand sanitizer at the entrance."

VS.

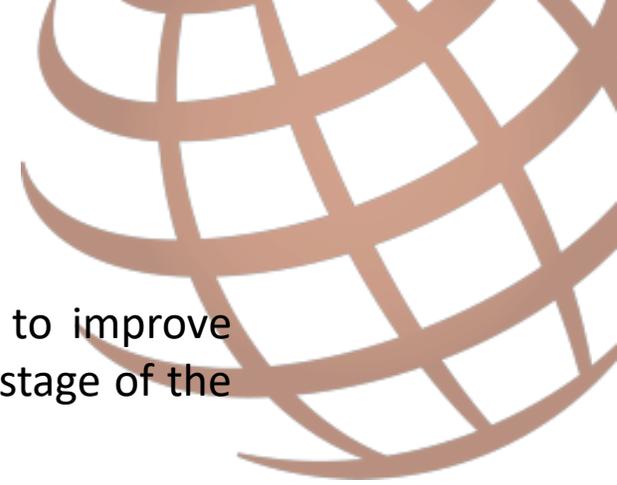
Low scores:



"More could be done in terms of sanitizing for example the chairs and objects touched."

"I didn't feel safe because there were many people not respecting any recommendation."

Conclusions



Whilst performance is generally good in Italy in our sample, there is a clear opportunity to improve safety measures, in order to instil confidence, protect future revenue and, at this particular stage of the Pandemic, to mitigate the risk of infection.

All 5 key measures had an impact on how safe customers felt when out and about shopping, with a direct impact on recommendation , Sanitisation and Social Distancing.

Staff and customers should also mind the gap at all times, not just when it is easy to do so, read and follow the signs and keep well sanitised. It should not be that difficult, though it still appears to be so some of the time. Hopefully when we look again in the coming weeks and months standards will continue to improve, customers will feel safer and recommendations will flow. For now it looks like we all need to keep up the efforts to do the basics.

Those organisations that invest in getting things right and measure how well the basics are delivered will score highest with customers and increase footfall as a result.