

COVID-19 perspective Netherlands

Do you feel safe
out and about?

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MYSTERY SHOPPING PROFESSIONALS ASSOCIATION



COVID-19 perspective NL

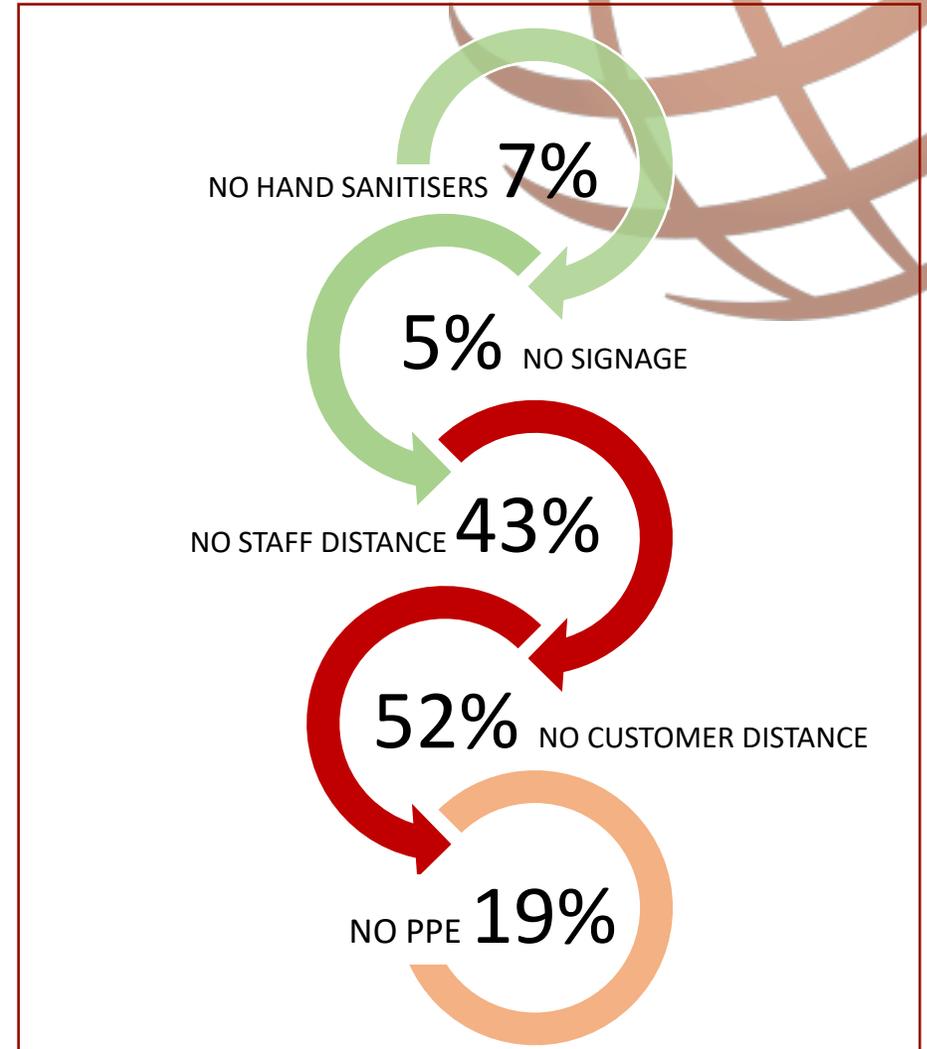
Background



- 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
- 115 interactions were assessed in Netherlands 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 NL?

- The answer is pretty much every where...
- Was **SANITISATION** equipment available to you? (gels, sprays, dispensers) – **over 9 out of 10 times**
- Was clear **SIGNAGE** regarding social distancing on display? – **9.5 out of 10 times**
- Was **SOCIAL DISTANCE** observed by the **STAFF** in location? – **about 6 out of 10 times**
- Was **SOCIAL DISTANCE** observed by the **CUSTOMERS** in location? – **about 5 out of 10 times**
- Did staff have **PERSONAL PROTECTION OR SCREENS** to prevent infection? **8 out of 10 times**



Mind the Gaps... what does this mean?

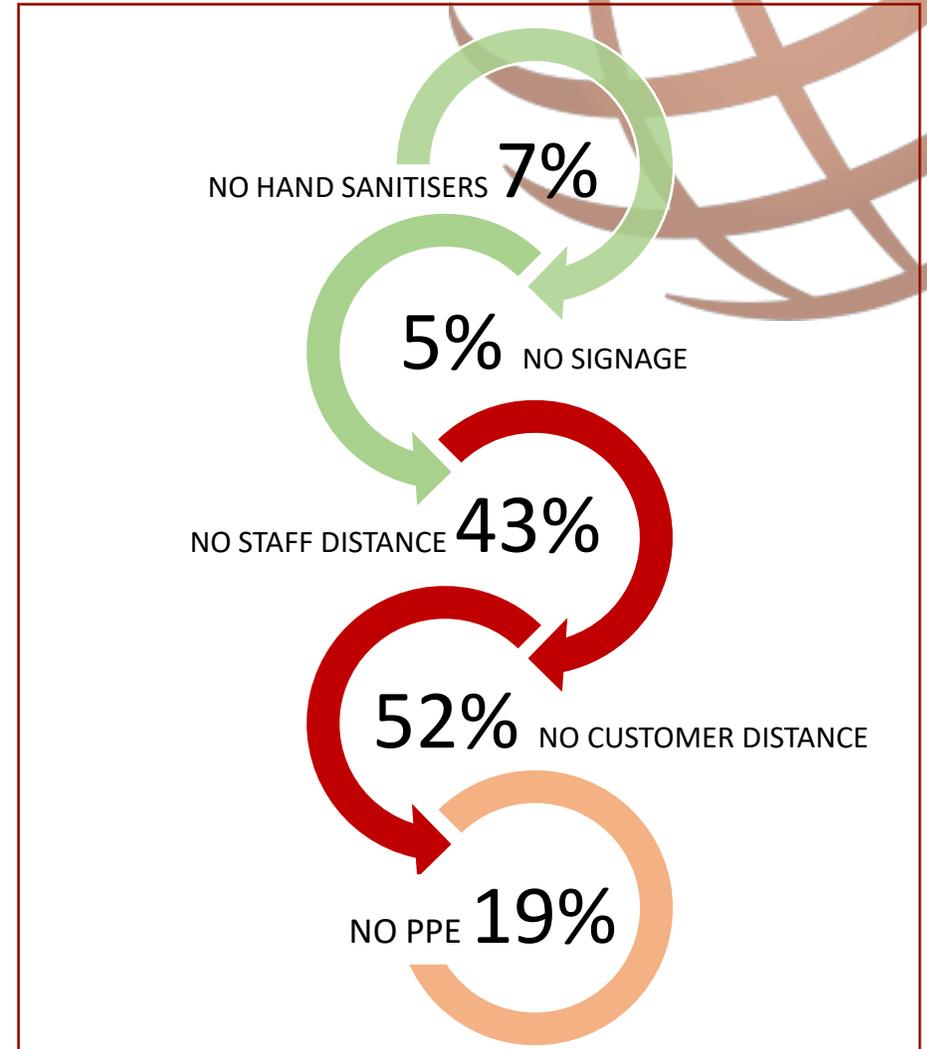
Gaps in our collective ability to observe the hygiene factors required there will be an inevitable impact on our health and our economy.

10% of customers said they actually felt unsafe to complete their transaction

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

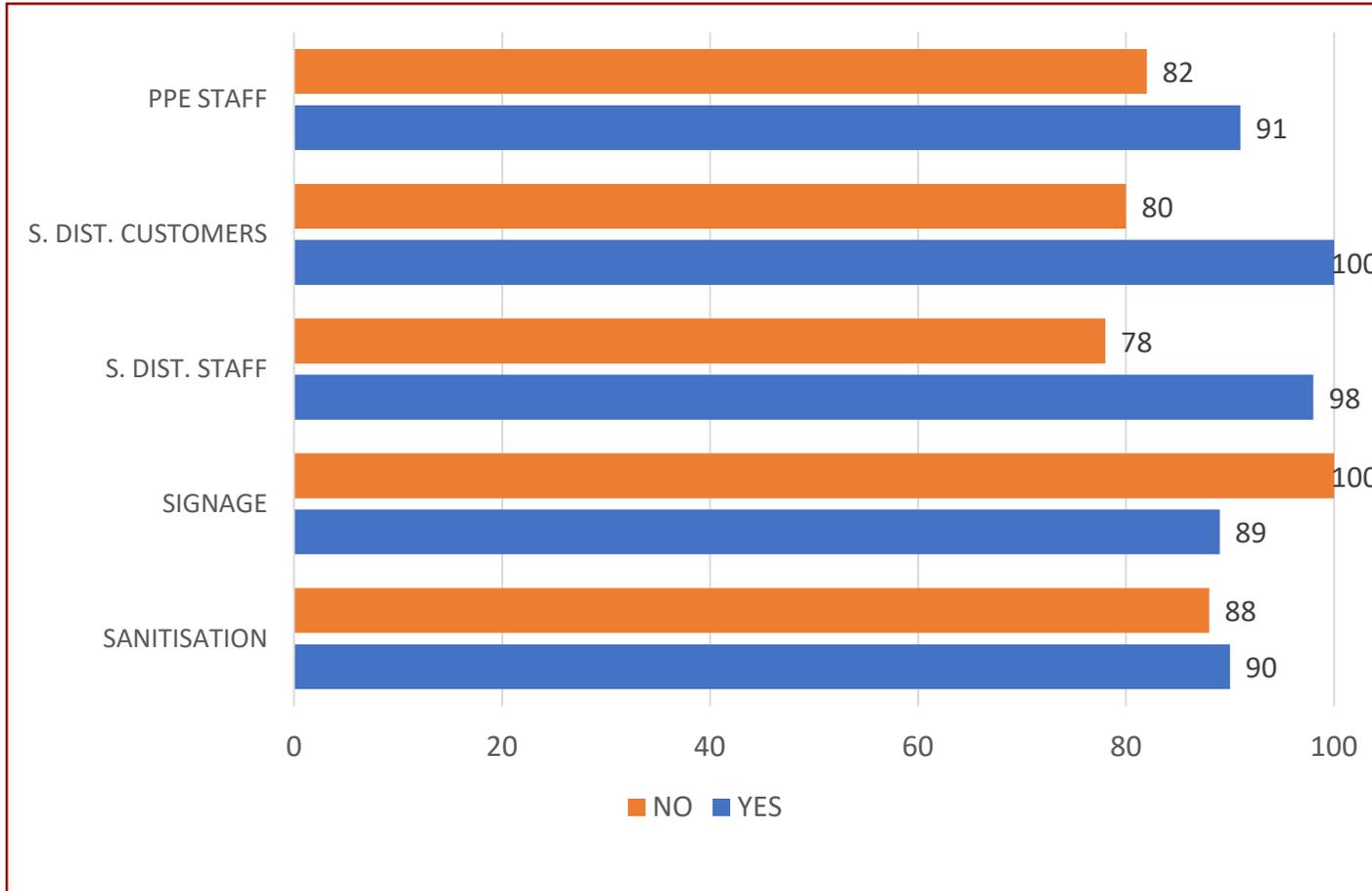
The recommendation rate is 8.1 out of 10!

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 Customer and Staff Socially distancing have the most impact on perception of safety with a gap in perception of 20 points between when it does exist to when it does not.

The gaps show most elements are important:-

Sanitisation: 2

Signage: -11 (influenced by low sample)

Social Distance STAFF: 20

Social Distance CUSTOMERS: 20

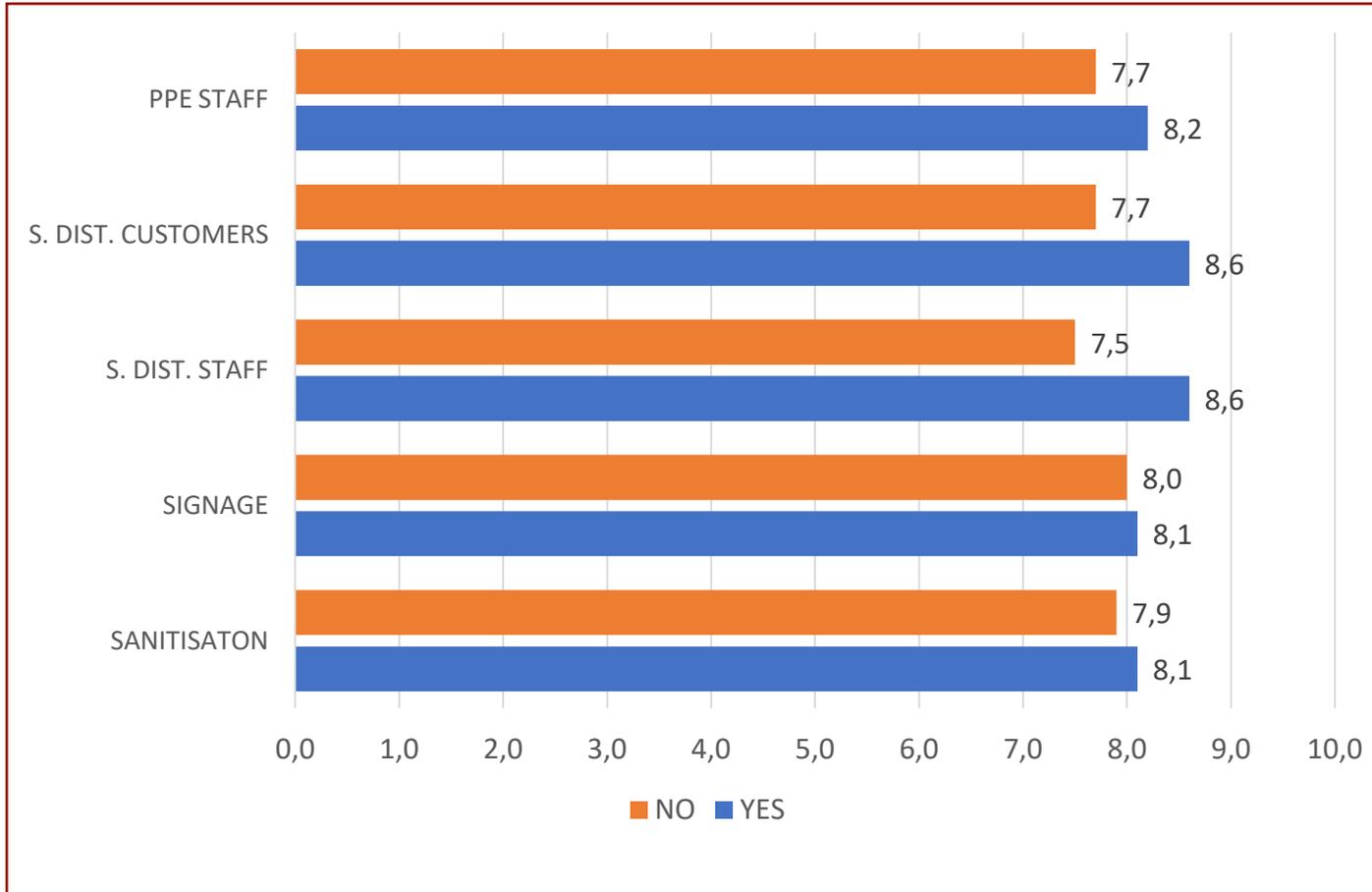
PPE STAFF: 9

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

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 Socially Distanced staff and customers as paramount:

Sanitisation: 0,2

Signage: 0,1 (influenced by low sample)

Social Distance STAFF: 0,9

Social Distance CUSTOMERS: 0,9

PPE STAFF: 0,5

COMMENTARY

What the people say!

From the mouths of customers

High scores:



"They have implemented all measures recommended by the government."

"I feel safe in this supermarket. There is enough room to avoid each other and entryways are one-way. There is a new system in place to decontaminate your own shopping cart."

VS.

Low scores:



"I think the discipline of the clients and staff is decreasing."

"It is a very nice store, but the safety things for Covid are very bad. Spray is there, but paper towel is always finished. Social distancing is recommended by signs but no one takes notice of it."

Conclusions



Whilst performance is inconsistent in The Netherlands, 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.

Most key measures had an impact on how safe customers felt when out and about shopping, with a direct impact on recommendation , particularly Social Distance of Staff and Customers. The lowest scoring and most important factors.

Staff and customers should 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.