

COVID-19 perspective Belgium

# Do you feel safe out and about? – Part 2

MSPA Survey • 16<sup>th</sup> November 2020



# Background

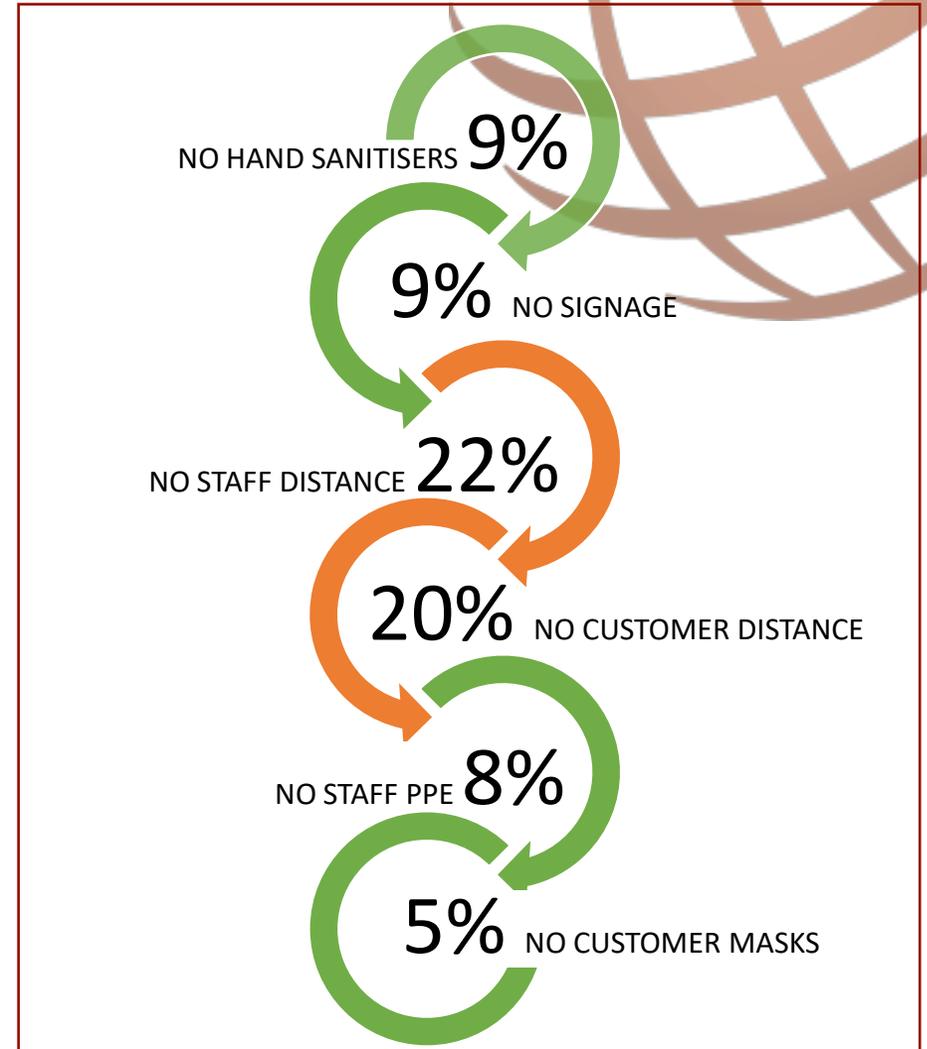


- The MSPA Europe Africa conducted surveys amongst members of the general public about their experiences when out shopping, dining and going about their daily lives, initially over two weeks from 7<sup>th</sup> to 21<sup>st</sup> July and repeated from 25<sup>th</sup> October to 13<sup>th</sup> November 2020.
- 83 interactions were assessed initially in July, with a further 79 in October/November, based on the principles of COVID-19 prevention of transmission:-
  - Sanitisation
  - Signage
  - Social distancing
  - PPE for Staff
  - Mask wearing by customers (Phase 2 only)
- Respondents were asked about their feeling of safety to complete the transaction and likelihood to recommend the place they visited
- The findings show mixed levels of best practice, with a potential impact on national health and a real impact on consumer confidence and advocacy
- We need to keep minding those gaps!

# Mind the Gaps... what are we missing in Belgium?

The answer is mixed, with a few GAPS here and there...

- Was **SANITISATION** equipment available to you? (gels, sprays, dispensers) – **9 out of 10 times**
- Was clear **SIGNAGE** regarding social distancing on display? – **9 out of 10 times**
- Was **SOCIAL DISTANCING** followed by the **STAFF**? – **about 8 out of 10 times**
- Was **SOCIAL DISTANCING** followed by the **CUSTOMERS**? – **8 out of 10 times**
- Did staff have **PERSONAL PROTECTION OR SCREENS** to prevent infection? – **9.2 out of 10 times**
- Did all customers wear **MASKS** to prevent infection? – **9.5 out of 10 times**



# Mind the Gaps... what does this mean?

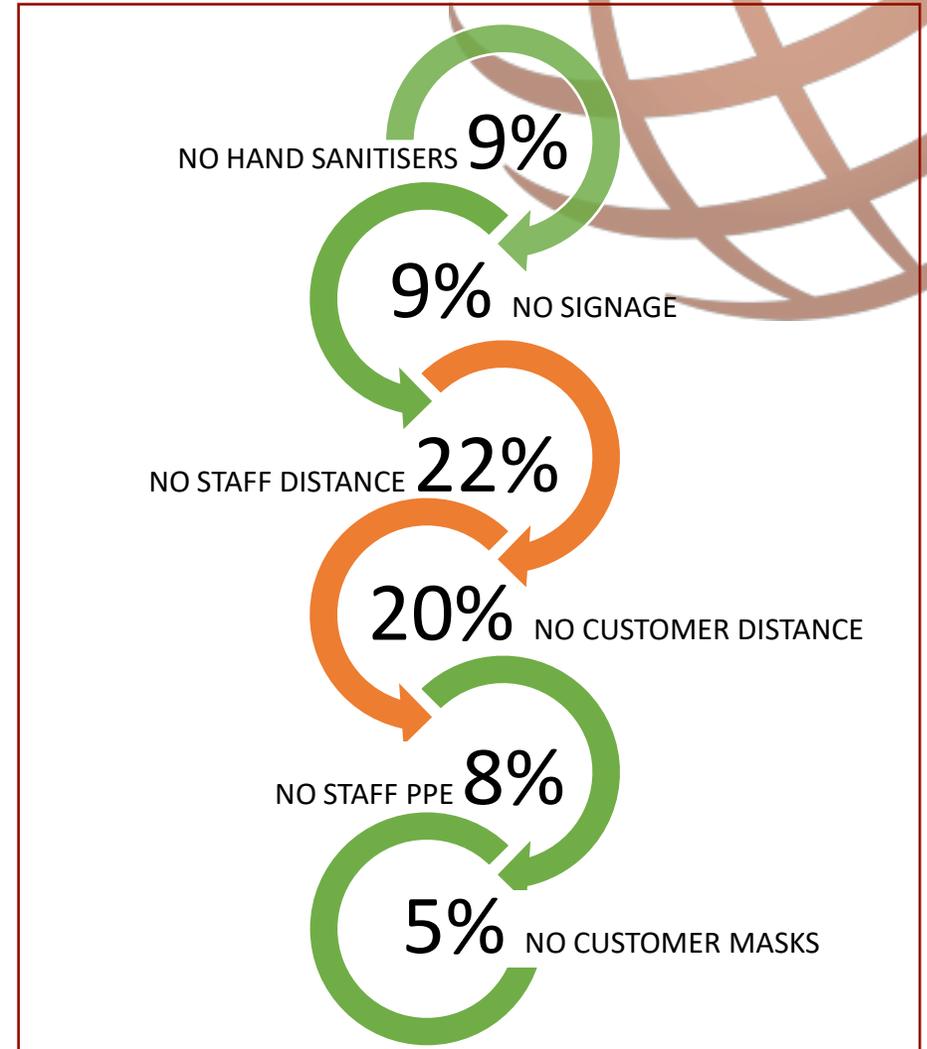
With gaps in our collective ability to observe the hygiene factors required, there will be an inevitable impact on our health and our economy.

**20% of customers said they actually felt unsafe to complete their transaction**

*that means under 2 in 10 customer revenue is potentially lost...*

**The recommendation rate is 8.1 out of 10!**

*On the surface this seems okay, both of these measures have significantly declined since July, so have businesses failed to make a good impression as we deal with a continued virus threat?*



# Mind the Gaps... what has changed?



IMPROVED LEVELS OF  
SANITISATION

REDUCED LEVELS OF  
SIGNAGE

IMPROVED LEVELS OF  
STAFF DISTANCING

IMPROVED LEVELS OF  
CUSTOMER DISTANCING

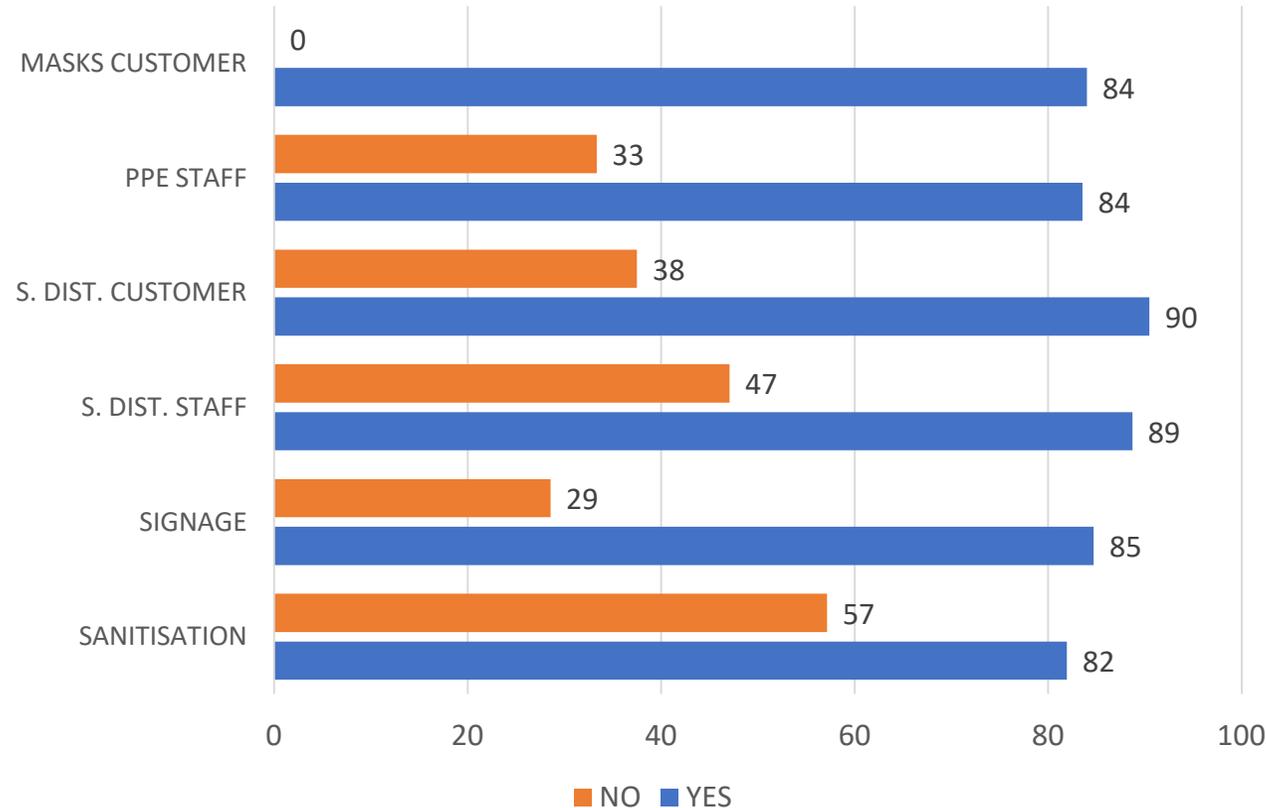
MARGINALLY IMPROVED  
LEVELS OF PPE

FEW GAPS  
IN MASK WEARING



# What is most important in terms of safety perception?

How do each of the 6 safety measures impact how customers feel about safety? The graph bars show perception of safety when the safety measure exists (blue bar), vs when it does not (orange bar)



There is a clear indication that all measures that when properly fulfilled will increase a sense of safety!

The gaps show all elements are important:-

Sanitisation: 25

Signage: 56

Social Distance STAFF: 42

Social Distance CUSTOMERS: 52

PPE STAFF: 51

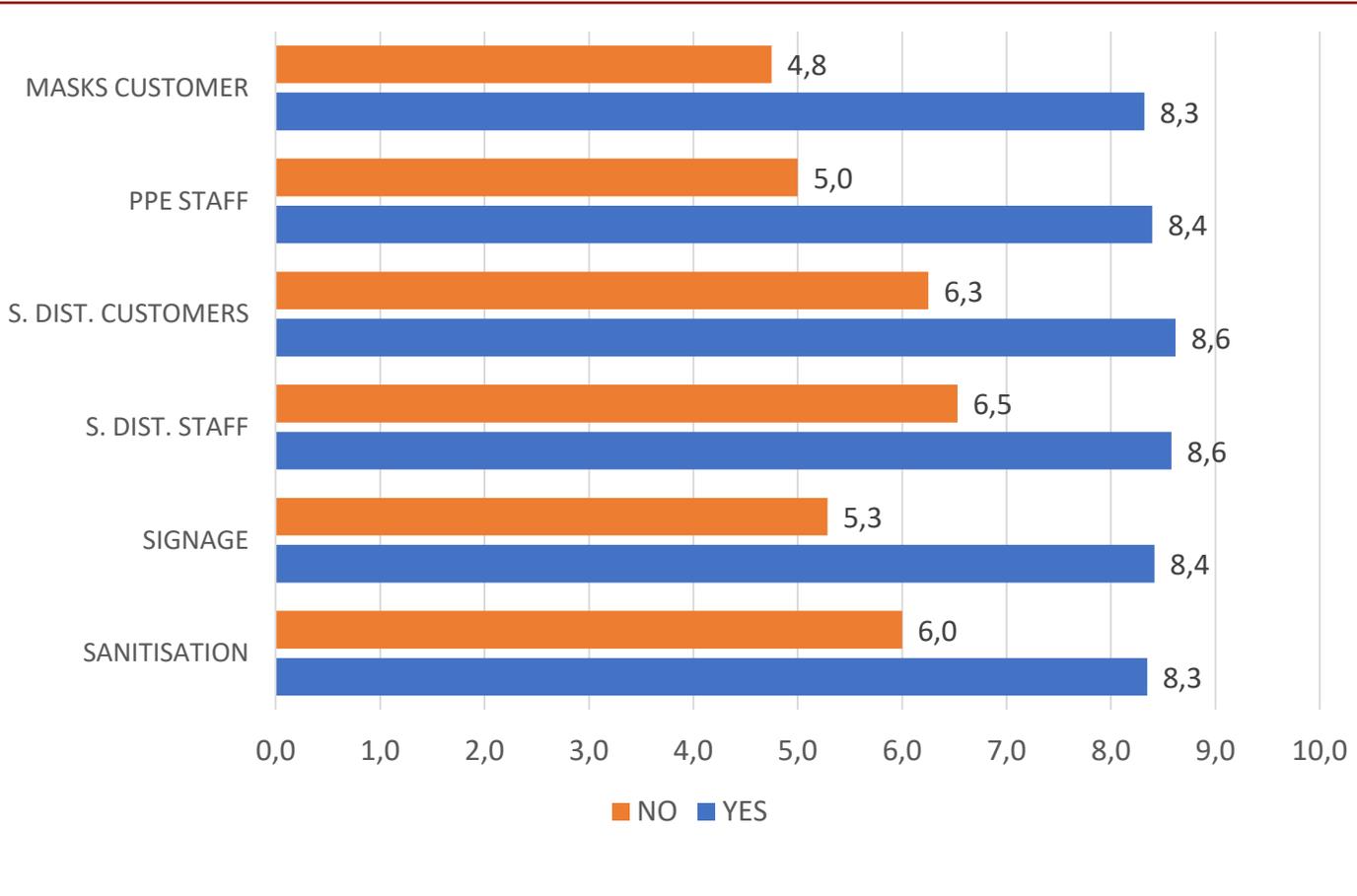
Masks CUSTOMER: 84

**Clearly though no one feels safe if they see customers without a mask**

**COMMENTARY**

# But what drives customer recommendation most?

How do each of the 6 safety measures impact how likely customers are to recommend? The graph bars show recommendation levels out of 10 when the measure exists (blue bar), vs when it does not (orange bar)



The difference (in marks out of 10) between fulfilling or not fulfilling each criteria shows staff PPE and customer mask wearing are most important:

Sanitisation: 2.3

Signage: 3.1

Social Distance STAFF: 2.1

Social Distance CUSTOMERS: 2.3

**PPE STAFF: 3.4**

**Mask CUSTOMERS 3.5**

**COMMENTARY**

# What the people say!

From the mouths of customers...



High score:

*“The staff and the customers respected all the measures, wearing masks and keeping distance.”*  
*“Everything was fine. Gel, masks and social distancing.”*

VS.

Low scores:



*“Visitors often brush up on each other, put themselves anywhere, and even some people say they don’t care about the mask and are not afraid. Without respect! “*

*“Peu de clients portaient un masque ou des gants alors que tous prenaient les pistolets de pompes en main pour se servir de l’essence. Ceux ci ne sont jamais désinfectés.”*

*Translated:- “Few of the customers wore face masks or gloves as they all picked up pump guns to use gasoline. These are never disinfected.”*

# Conclusions

General performance is marginally improved Belgium. There is however still a clear opportunity to improve customer and staff social distancing and it is important for businesses to encourage them to do so. This will inevitably instil more confidence, protect future revenue and, at this particular stage of the Pandemic, to mitigate the risk of infection.

All 6 key measures had an impact on how safe customers felt when out and about shopping, with a direct impact on likelihood to recommend, particularly Staff PPE, which is in businesses control, and the encouragement of customers to wear masks, without them all confidence on safety is lost.

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 and above all wear masks. It should not be that difficult, though it sometimes appears to be so. We hoped that standards would improve from July, customers will feel safer and recommendations will flow, and this seems to be the case. For now it looks like we all need to try a hard to maintain the basics.

**It is clear that 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.**