

COVID-19 perspective Czech Republic

Do you feel safe out and about?

MSPA Survey • 16th November 2020



Background

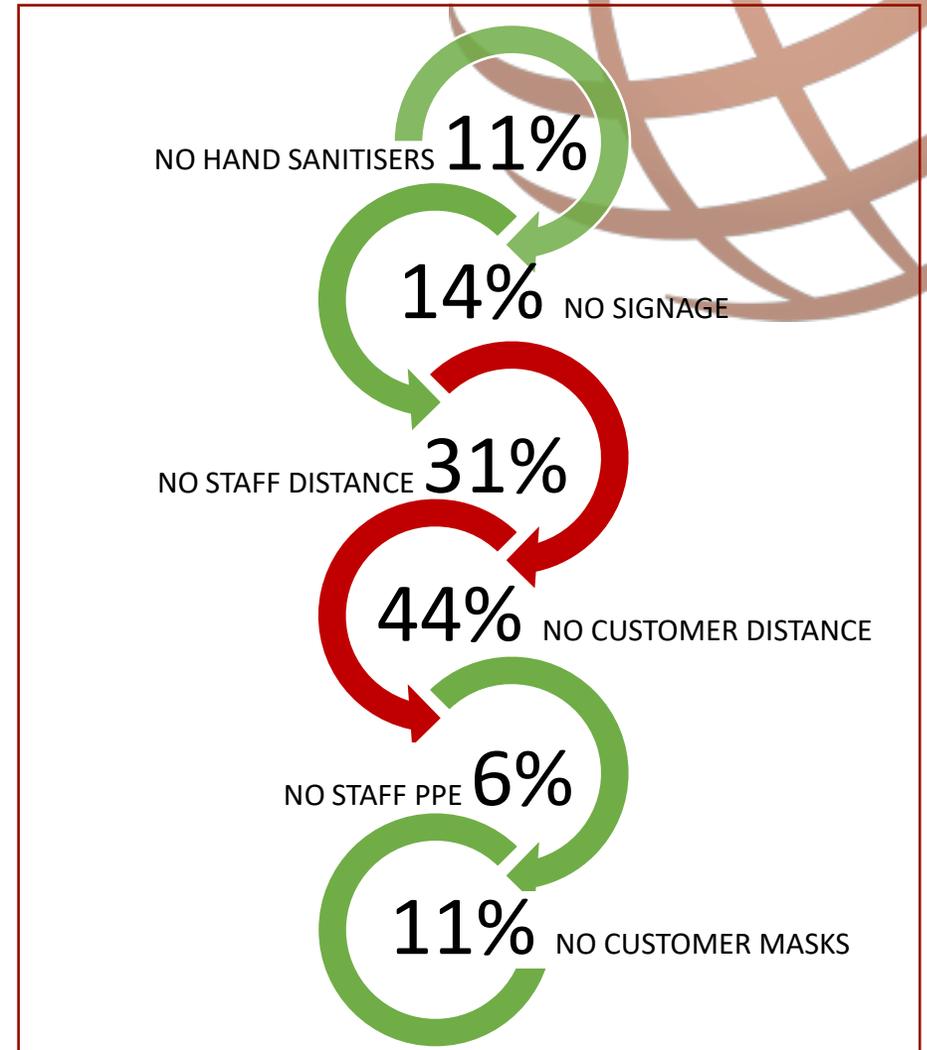


- The MSPA Europe Africa conducted surveys amongst members of the general public about their experiences when out shopping, dining and going about their daily lives from 25th October to 9th November 2020.
- 311 interactions were assessed in October/November, (and compared to 143 in July 2020) based on 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, which will have 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 the Italy?

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

- Was **SANITISATION** equipment available to you? (gels, sprays, dispensers) – **nearly 9 out of 10 times**
- Was clear **SIGNAGE** regarding social distancing on display? – **8.6 out of 10 times**
- Was **SOCIAL DISTANCING** followed by the **STAFF**? – **about 7 out of 10 times**
- Was **SOCIAL DISTANCING** followed by the **CUSTOMERS**? – **over 4 out of 10 times**
- Did staff have **PERSONAL PROTECTION OR SCREENS** to prevent infection? – **9.6 out of 10 times**
- Did all customers wear **MASKS** to prevent infection? – **Over 9 out of 10 times**



Mind the Gaps... what does this mean?

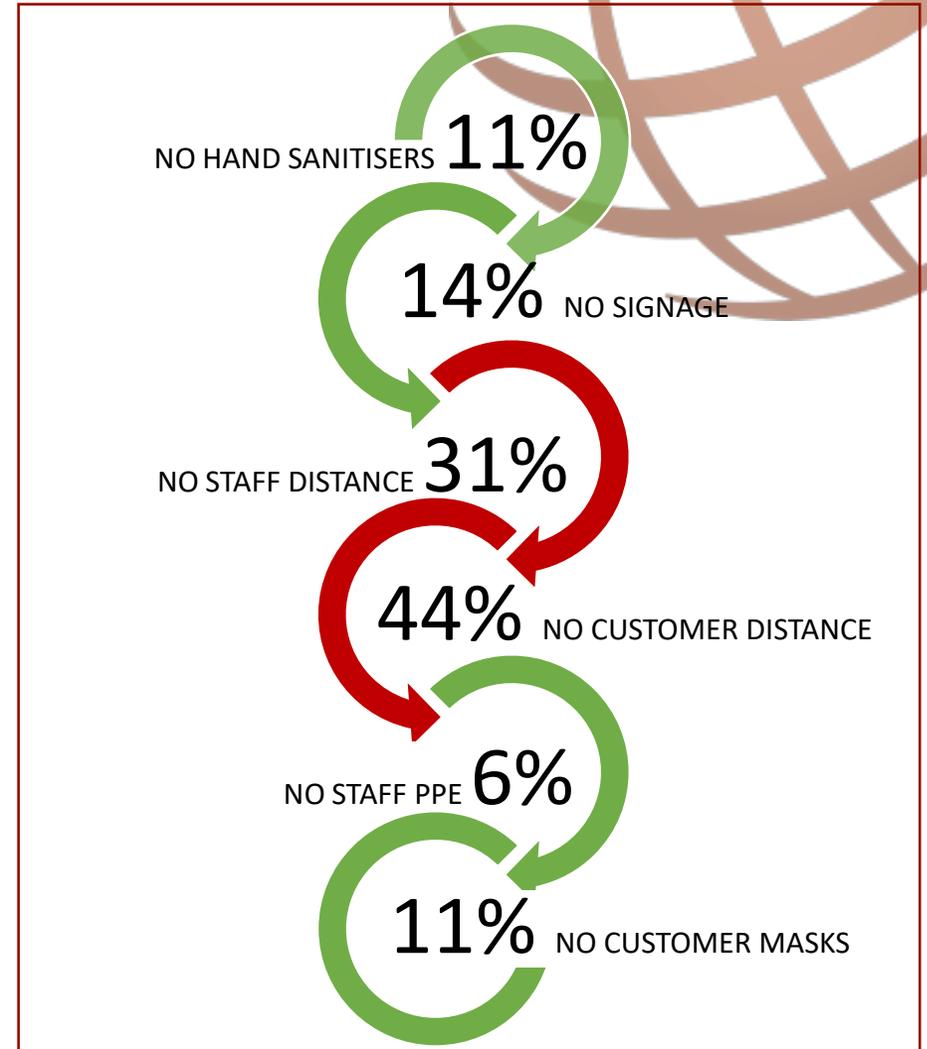
With fewer gaps in our collective ability to observe the hygiene factors required, there will be an inevitable impact on our health and our economy.

5% of customers said they actually felt unsafe to complete their transaction

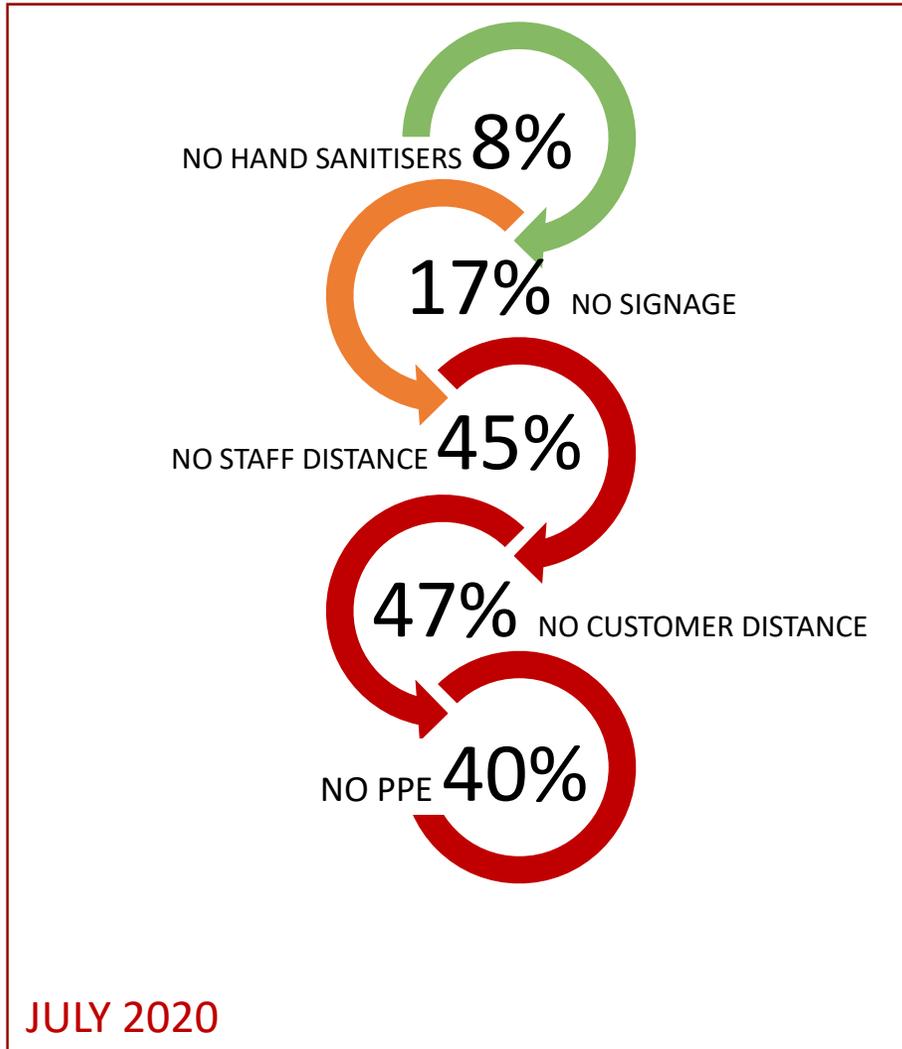
Nonetheless that means under 1 in 20 customer revenue is potentially lost...

The recommendation rate is 8.6 out of 10!

On the surface this seems very promising, so have businesses increased opportunities to make a good impression as we deal with a continued virus threat?



Mind the Gaps... what has changed?



IMPROVED LEVELS OF
SANITISATION

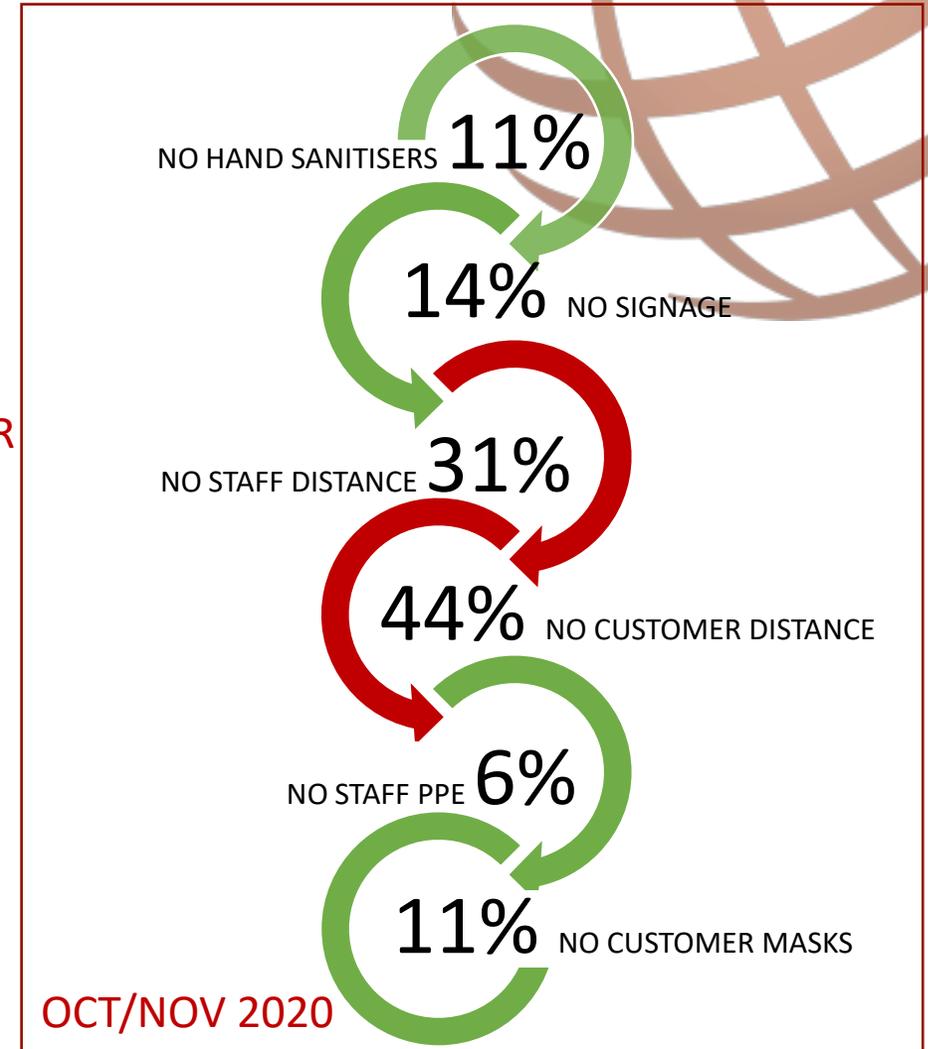
IMPROVED LEVELS OF
SIGNAGE

IMPROVED BUT STILL POOR
STAFF DISTANCING

POOR LEVELS OF
CUSTOMER DISTANCING

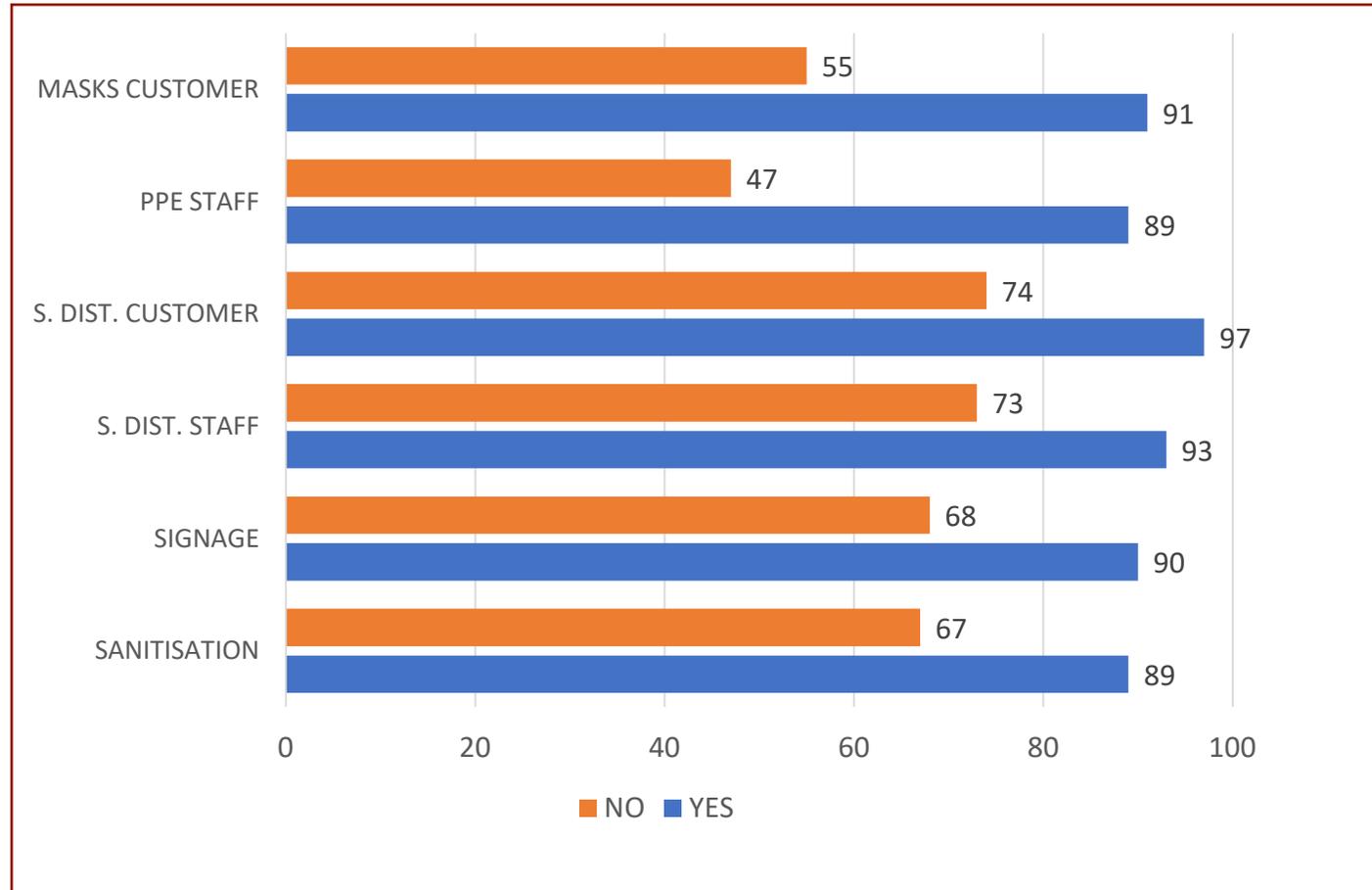
MUCH IMPROVED
LEVELS OF PPE

A 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 by over 20%

The gaps show all elements are important but mask wearing and PPE the most impact:-

Sanitisation: 22

Signage: 22

Social Distance STAFF: 20

Social Distance CUSTOMERS: 23

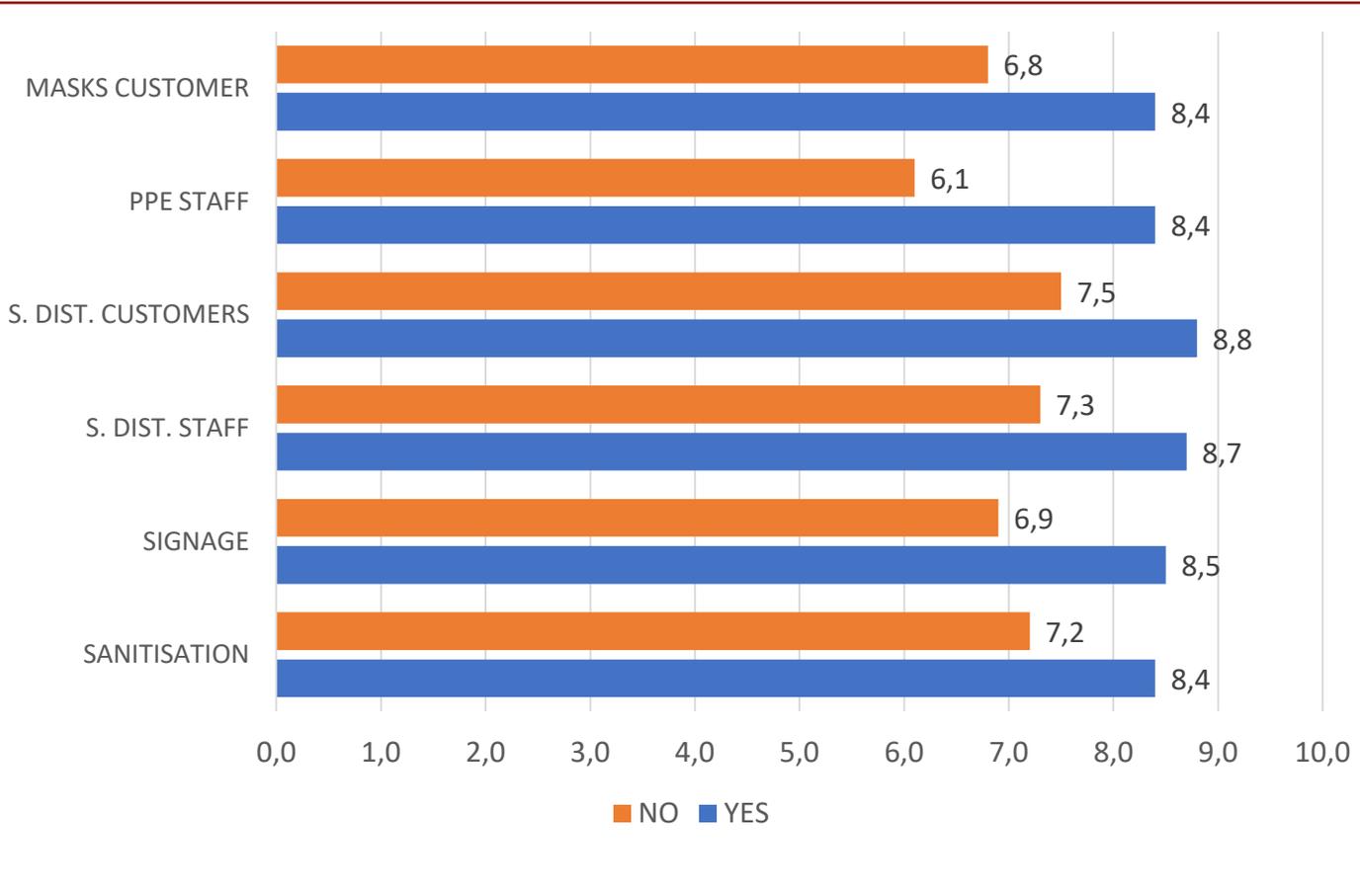
PPE STAFF: 42

Masks CUSTOMER: 36

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 as the most important factor:

Sanitisation: 1.2

Signage: 1.6

Social Distance STAFF: 1.4

Social Distance CUSTOMERS: 1.3

PPE STAFF: 2.3

Mask CUSTOMERS 1.6

COMMENTARY

What the people say!

From the mouths of customers...



High score:

“The sanitisation equipment was available, all the staff were using a form of facial protection, but not all customers kept the social distancing in the store. ”

VS.

Low scores:



“People are really not completely aware of the situation. Almost no one uses gels or keeps social distance. Social distance is one of the biggest problems. No employee is observing how customers behave or if they are safe”

“Everything is ok except for some people that obviously don't understand what is a 2m distance or some individuals that don't care about others at all and didn't even wear a mask. ”

Conclusions

General performance mixed in the Czech Republic. There is 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 are in businesses control, this also had a significant influence on perception of safety.

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 hope that standards continue to improve, 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.