

COVID-19 perspective Spain

Do you feel safe out and
about? – Part 2

MSPA Survey • 13th November 2020

Background

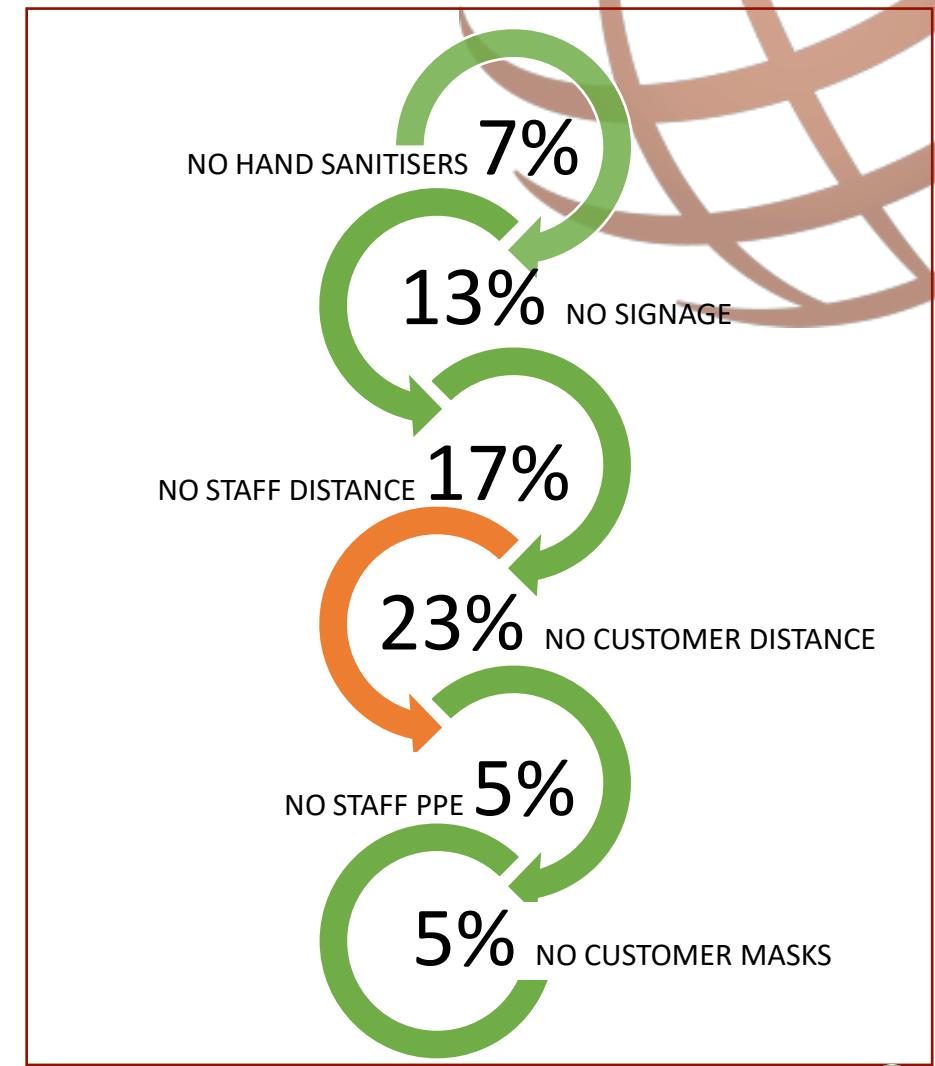


- The MSPA Europe Africa conducted surveys amongst members of the general public about their experiences when out shopping, dining and going about their daily lives, initially over two weeks from 7th to 21st July and repeated from 25th October to 9th November 2020.
- 398 interactions were assessed in July and a further 551 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 great improvements in 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 the Spain?

The answer is good, with a few GAPS everywhere...

- Was **SANITISATION** equipment available to you? (gels, sprays, dispensers) – **9.3 out of 10 times**
- Was clear **SIGNAGE** regarding social distancing on display? – **over 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**? – **nearly 8 out of 10 times**
- Did staff have **PERSONAL PROTECTION OR SCREENS** to prevent infection? – **9.5 out of 10 times**
- Did all customers wear **MASKS** to prevent infection? – **9.5 out of 10 times**



O to 17% (up to 1 in 6)
18 to 25% (up to 1 in 4)
26% over



Mind the Gaps... what does this mean?

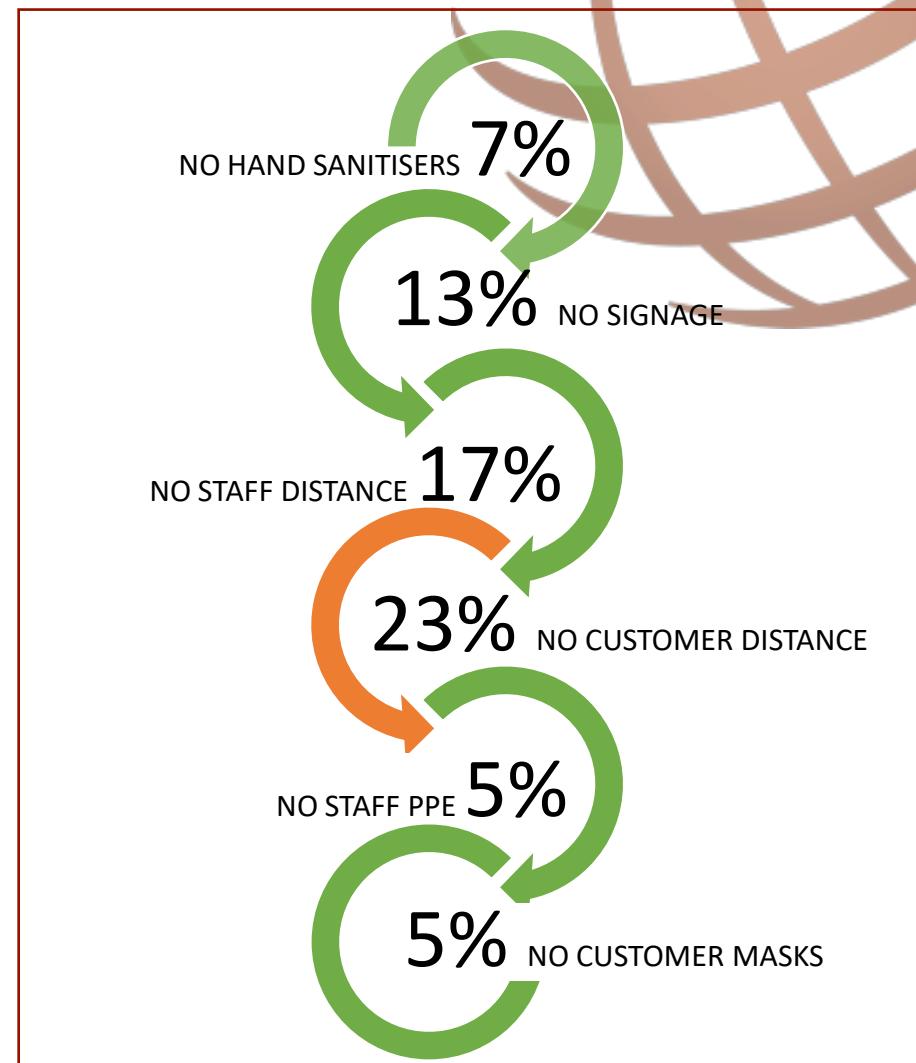
With fewer gaps in our collective ability to observe the hygiene factors required, there will be an inevitable impact on our health and our economy.

8% of customers said they actually felt unsafe to complete their transaction

Nonetheless that means under 1 in 10 customer revenue is potentially lost...

The recommendation rate is 8.4 out of 10!

On the surface this seems good, both of these measures have marginally improved since July, so have businesses increased opportunities to make a good impression as we deal with a continued virus threat?

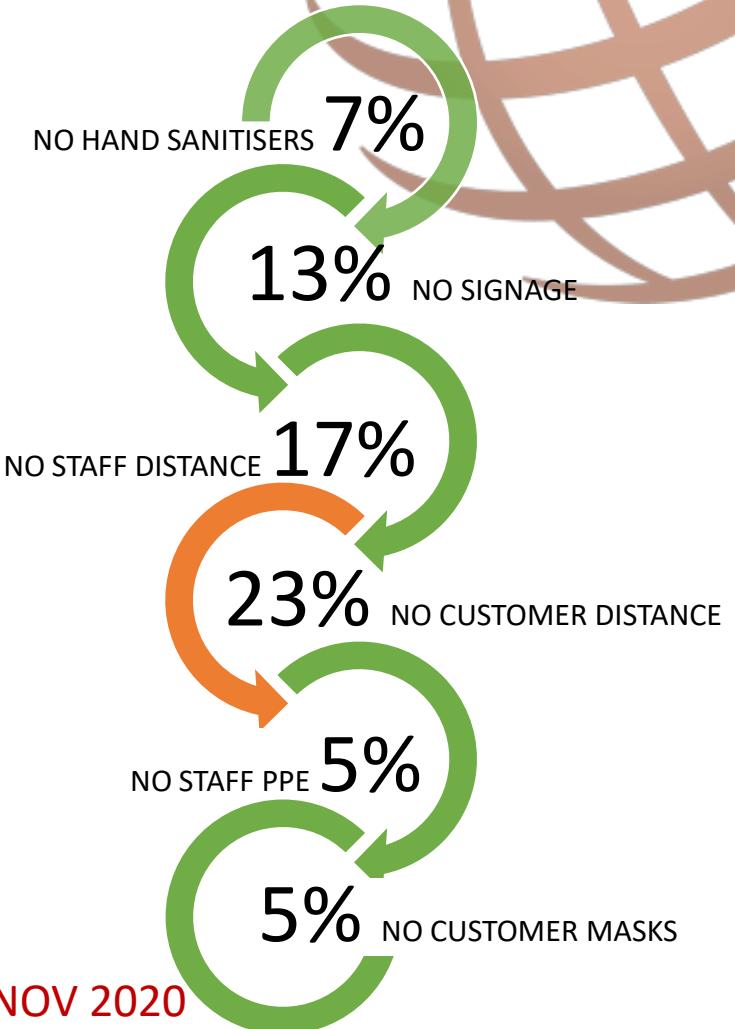


Mind the Gaps... what has changed?



JULY 2020

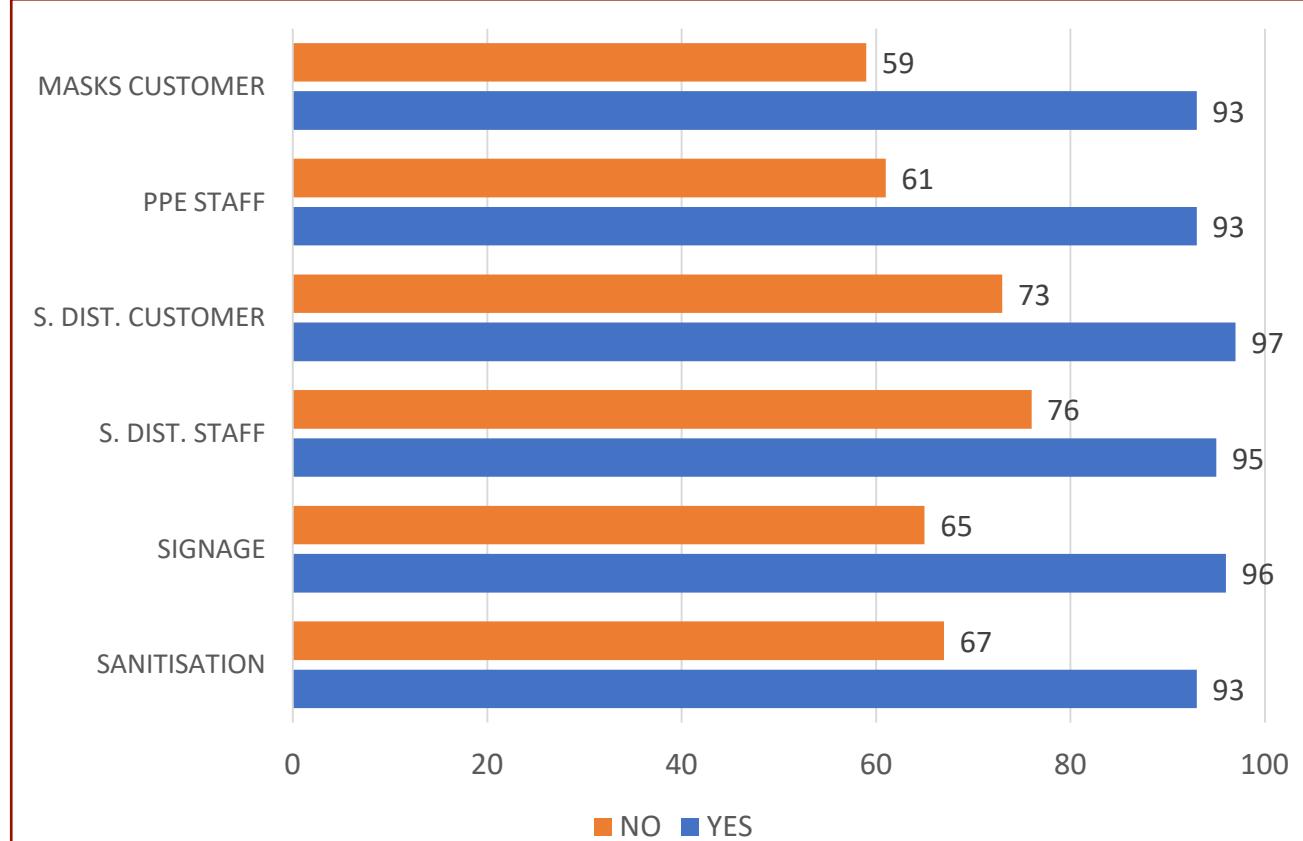
MORE
HAND SANITISERS
SIMILAR LEVELS OF
SIGNAGE
MARGINALLY BETTER
STAFF DISTANCING
BETTER BUT STILL AVERAGE
CUSTOMER DISTANCING
MUCH IMPROVED
LEVELS OF PPE
FEW GAPS
IN MASK WEARING



OCT/NOV 2020

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 these have the most impact:-

Sanitisation: 26

Signage: 31

Social Distance STAFF: 19

Social Distance CUSTOMERS: 24

PPE STAFF: 32

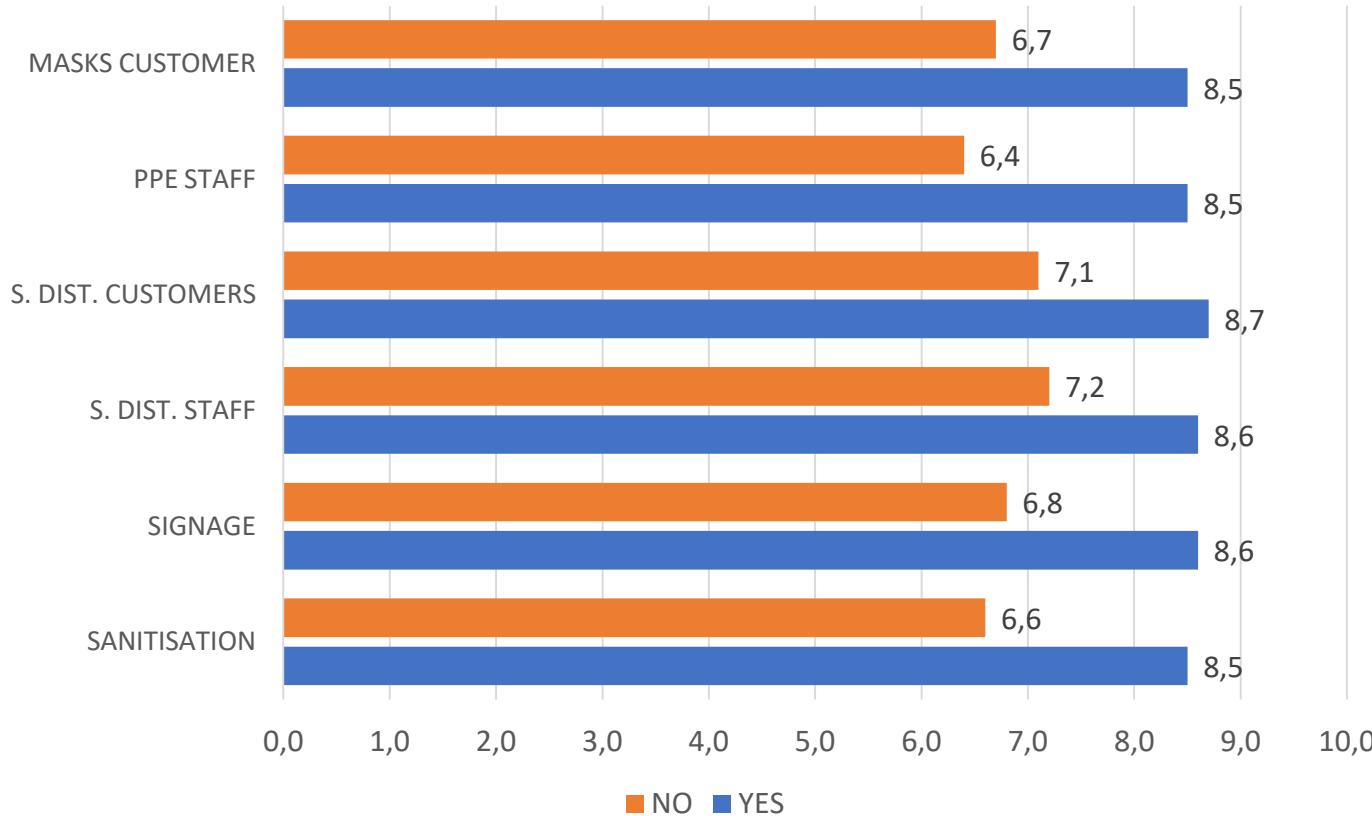
Masks CUSTOMER: 34

Masks and PPE use by both Staff and Customers are the most important influencers of feelings of safety

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)



Even more interestingly, the impact of these measures on recommendation equals that of safety!

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

Sanitisation: 1.9

Signage: 1.9

Social Distance STAFF: 1.4

Social Distance CUSTOMERS: 1.6

PPE STAFF: 2.1

Mask CUSTOMERS 1.8

COMMENTARY

What the people say!



From the mouths of customers...



High score:

"Everything was clean, the staff was fully equipped, and the customers were being respectful."

VS.

Low scores:

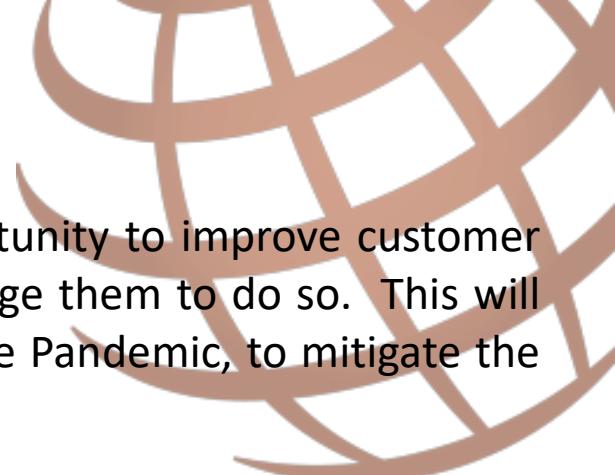


"There are safety measures on the part of workers but other customers are not responsible for the safety distance"

"The staff could be more strict about distancing in the queues... you have to turn your shopping cart the other way around so to give more distance between you and the customer in front of you at the check-out."

"Too many people. Very narrow corridors. Sales and packed offers and people very close together. A young worker wearing the facial mask down from the nose. Carts of goods in the middle of the aisle block customers with their carts and cause congestion"

Conclusions



General performance is good and much improved Spain. There is however a clear opportunity to improve customer and staff mask wearing and 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 Sanitisation and Signage, which are in businesses control, but mask wearing seemed to have the most 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 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 and 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.