

COVID-19 perspective UK

Do you feel safe out and about? – Part 2

MSPA Survey • 12th November 2020



Background

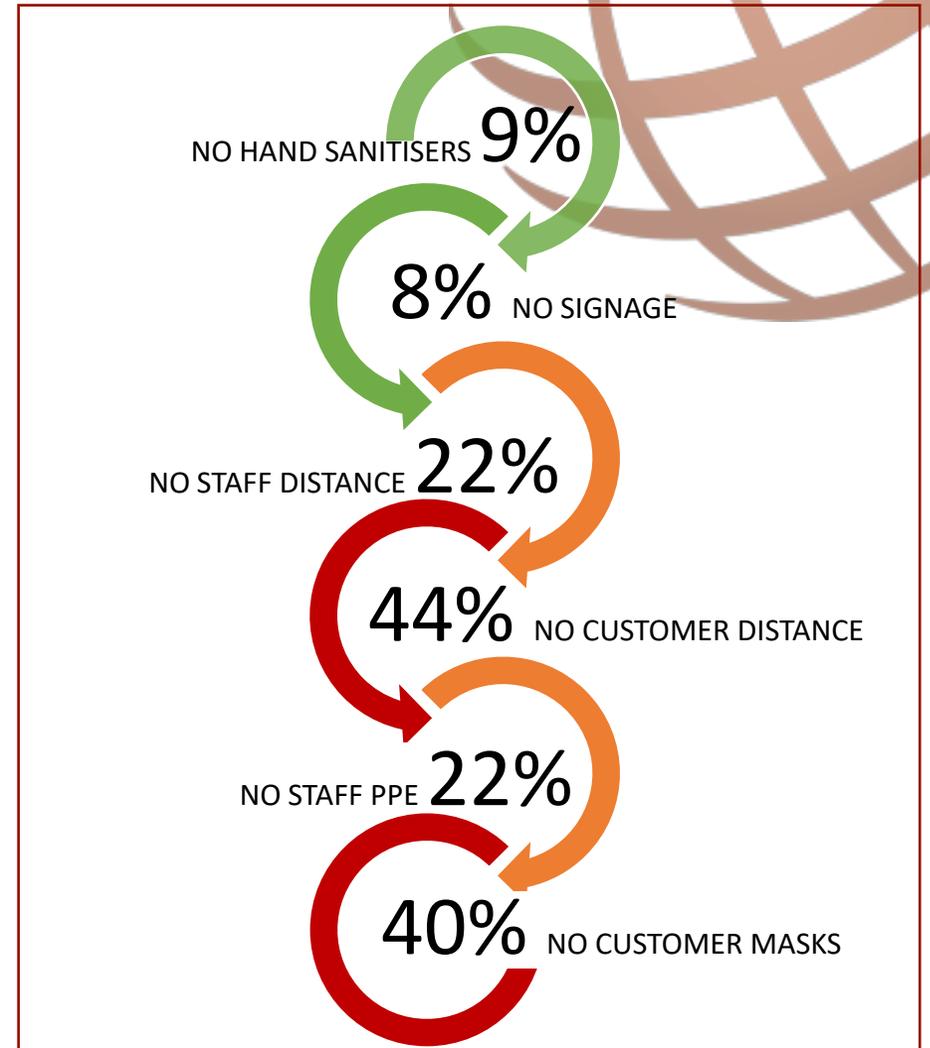


- The MSPA Europe Africa conducted surveys amongst members of the general public about their experiences when out shopping, dining and going about their daily lives, initially over two weeks from 7th to 21st July and repeated from 25th October to 9th November 2020.
- 3,200 interactions were assessed in July and a further 2,077 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 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 the UK?

The answer is pretty much that we have GAPS everywhere...

- Was **SANITISATION** equipment available to you? (gels, sprays, dispensers) – **9 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**? – **about half of the time**
- Did staff have **PERSONAL PROTECTION OR SCREENS** to prevent infection? – **8 out of 10 times**
- Did all customers wear **MASKS** to prevent infection? – **6 out of 10 times**



Mind the Gaps... what does this mean?

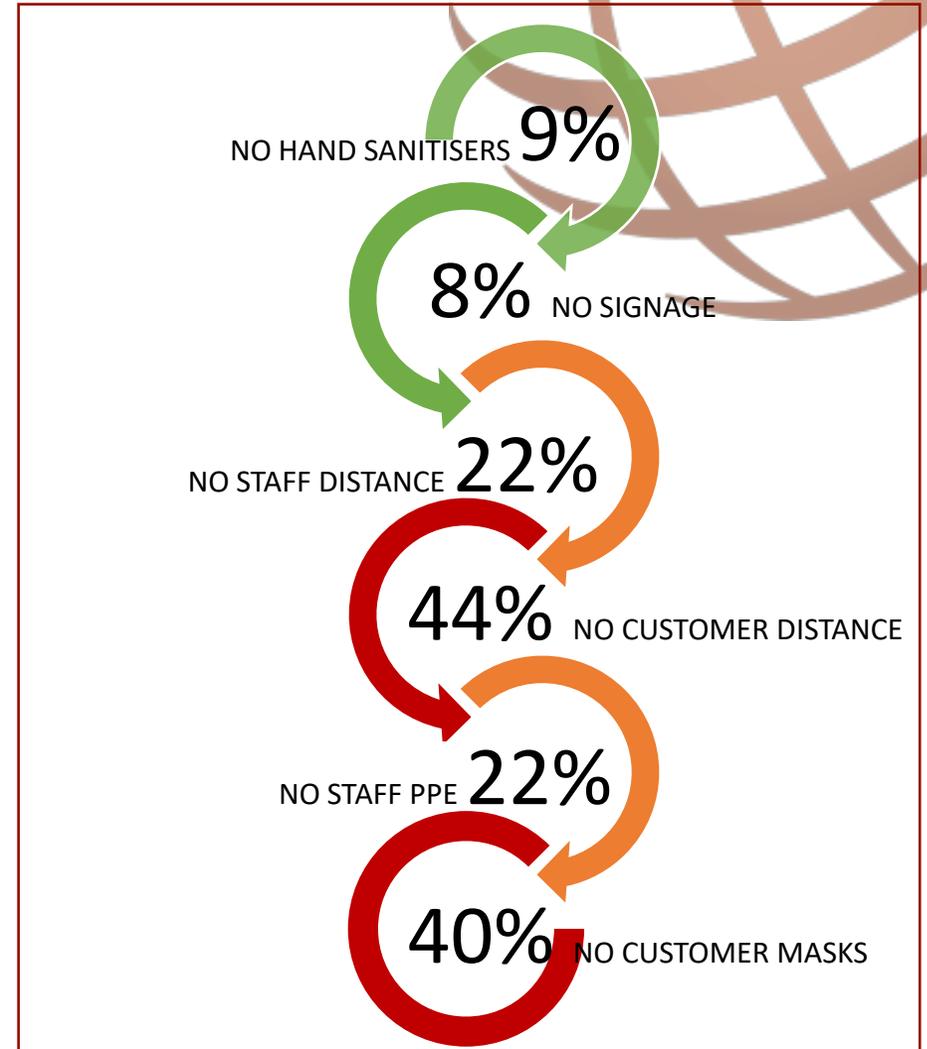
With these gaps in our collective ability to observe the hygiene factors required there will be an inevitable impact on our health and our economy.

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

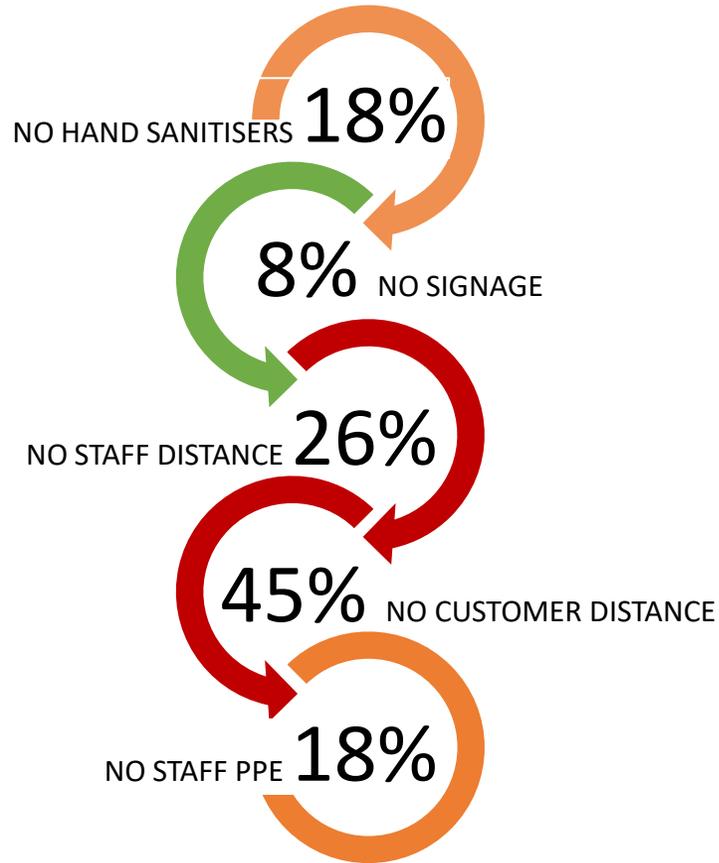
That means over 1 in 10 customer revenue is potentially lost...

The recommendation rate is 7.8 out of 10!

On the surface this seems okay, but both of these measures have marginally declined since July, so have businesses missed an opportunity to make a good impression as we deal with a continued virus threat?



Mind the Gaps... what has changed?



JULY 2020

MORE
HAND SANITISERS

SAME LEVELS OF
SIGNAGE

MARGINALLY BETTER
STAFF DISTANCING

STILL POOR
CUSTOMER DISTANCING

STILL GAPS
IN STAFF PPE

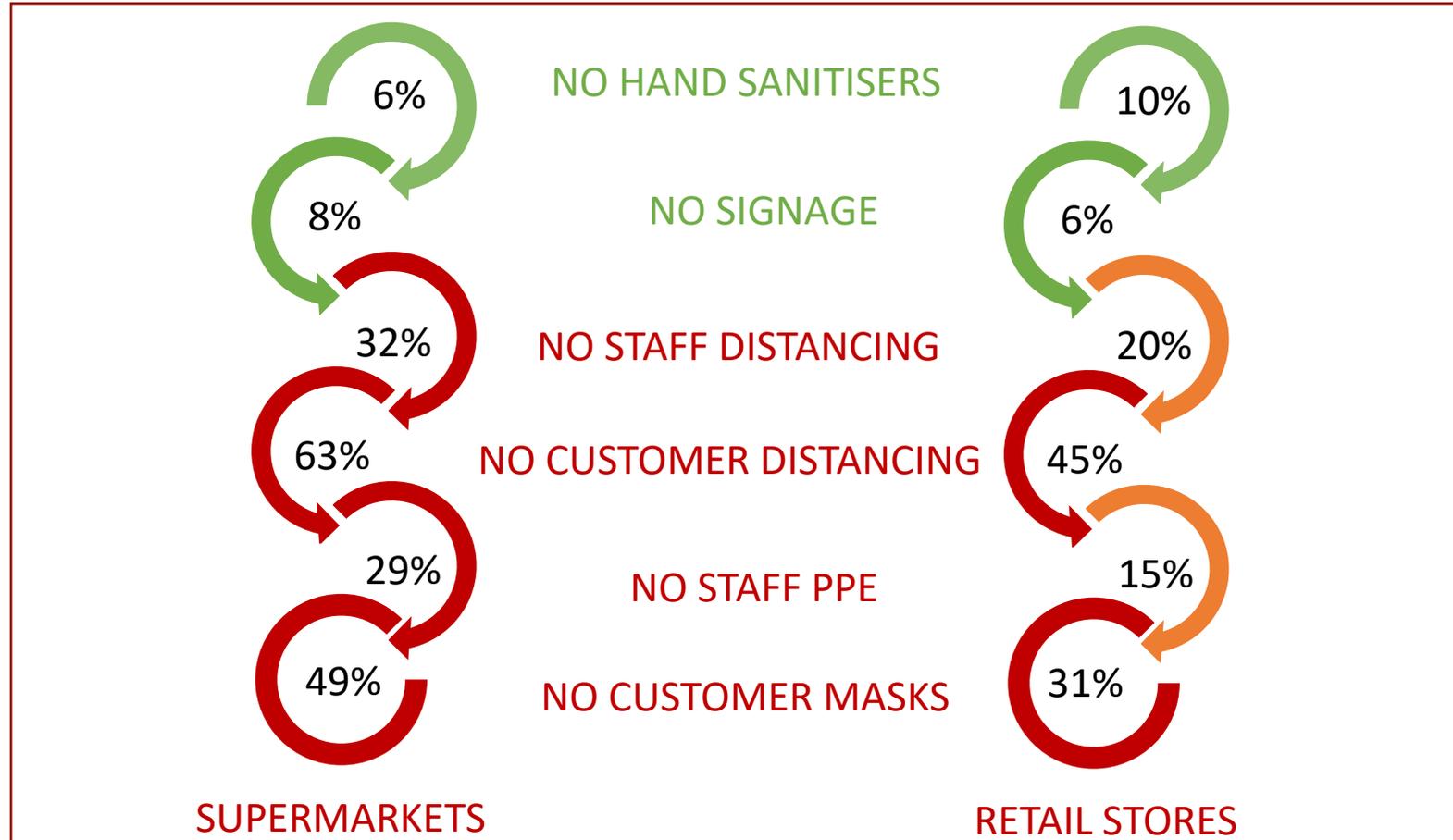
MAJOR GAPS
IN MASK WEARING



OCT/NOV 2020

What is the perspective by sector?

Two main sectors drive our opinions, this is how they perform...



Retail stores outperform Supermarkets in every category (with the exception of hand sanitisers).

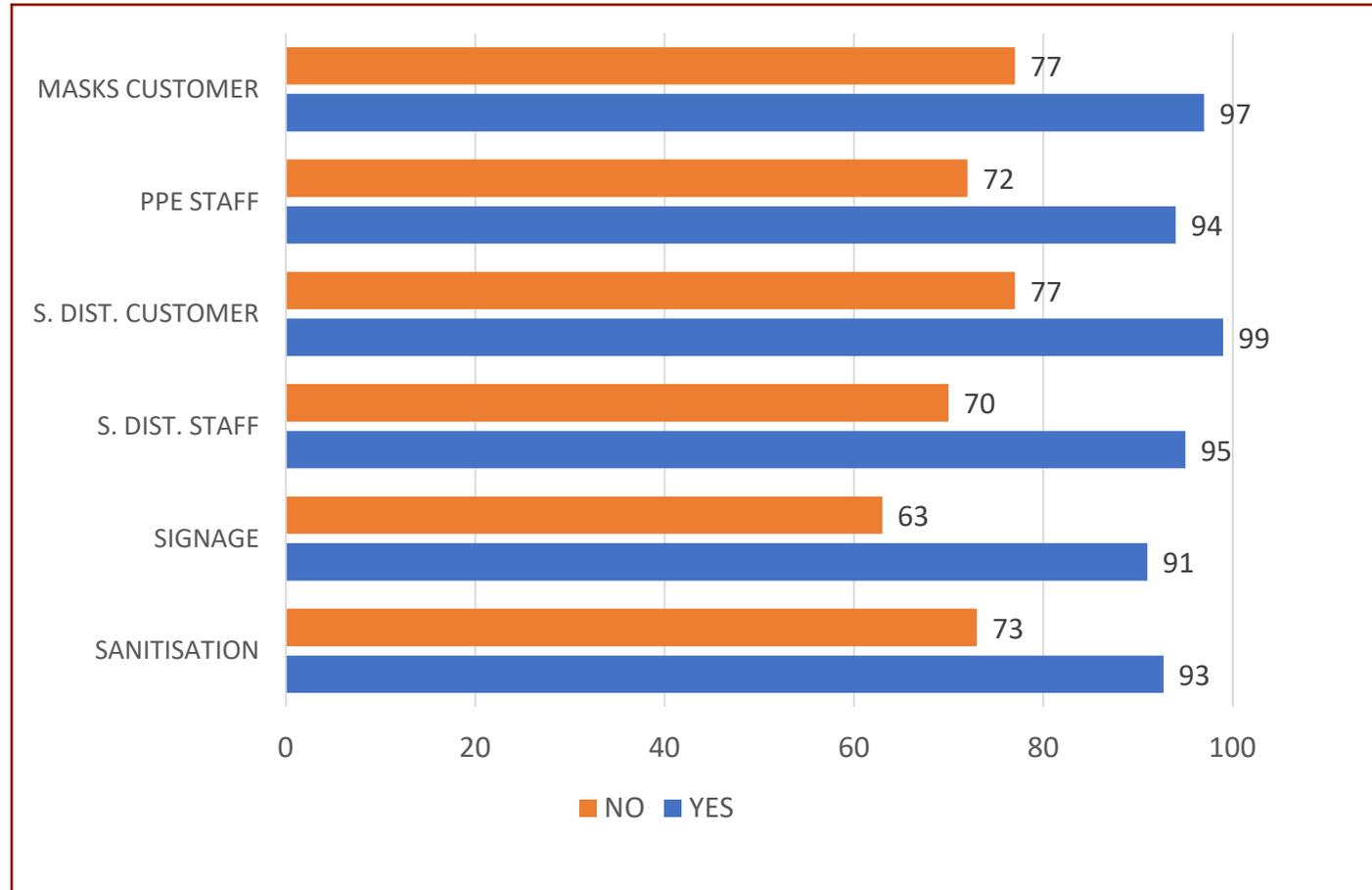
It is alarming to see that in supermarkets staff and customers fail to keep a distance consistently and **in nearly half of visits to supermarkets we saw cases where customers are not wearing masks while in the supermarket.**

It is clear that **Government and Health Authority messages on mask wearing and distancing are not consistently adhered to.**

COMMENTARY

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 if 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: 20

Signage: 28

Social Distance STAFF: 25

Social Distance CUSTOMERS: 22

PPE STAFF: 22

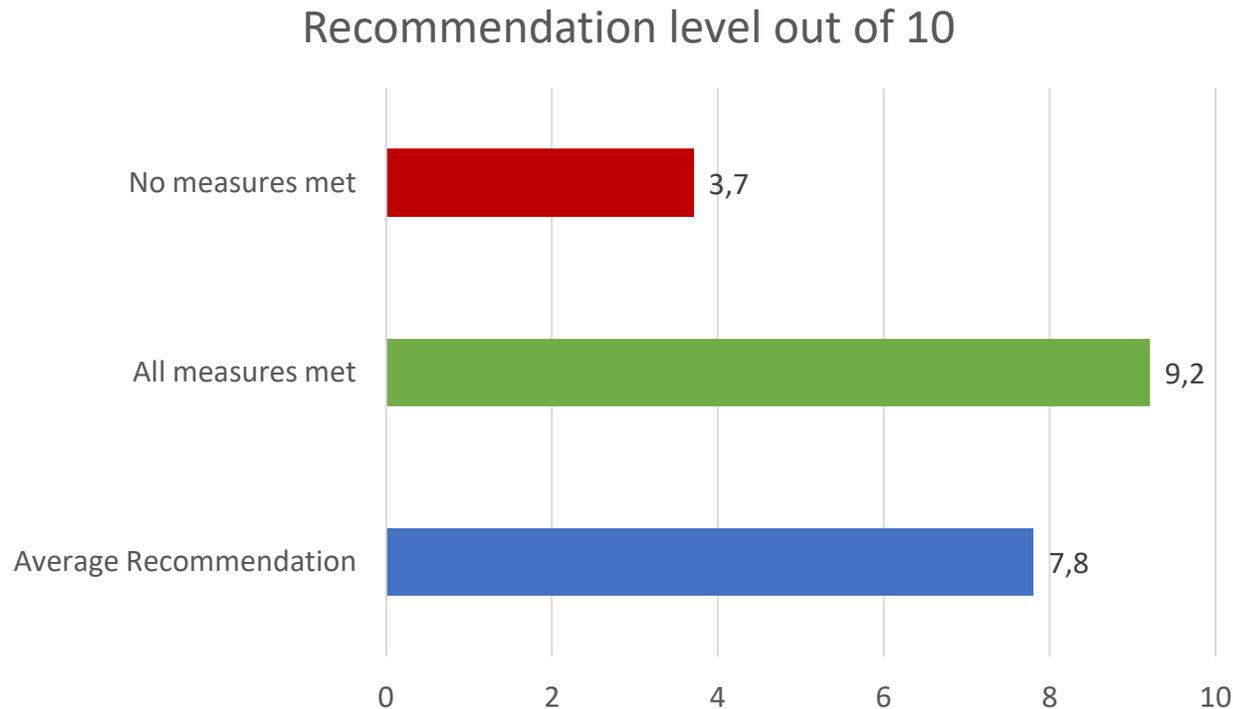
Masks CUSTOMER: 20

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

COMMENTARY

How likely are we to recommend a location?

When the 5 pillars are all met (or not) how likely are customers to recommend?



Generally speaking respondents are highly likely to recommend a location that demonstrates all the criteria. 9.2 on an NPS scale is very strong.

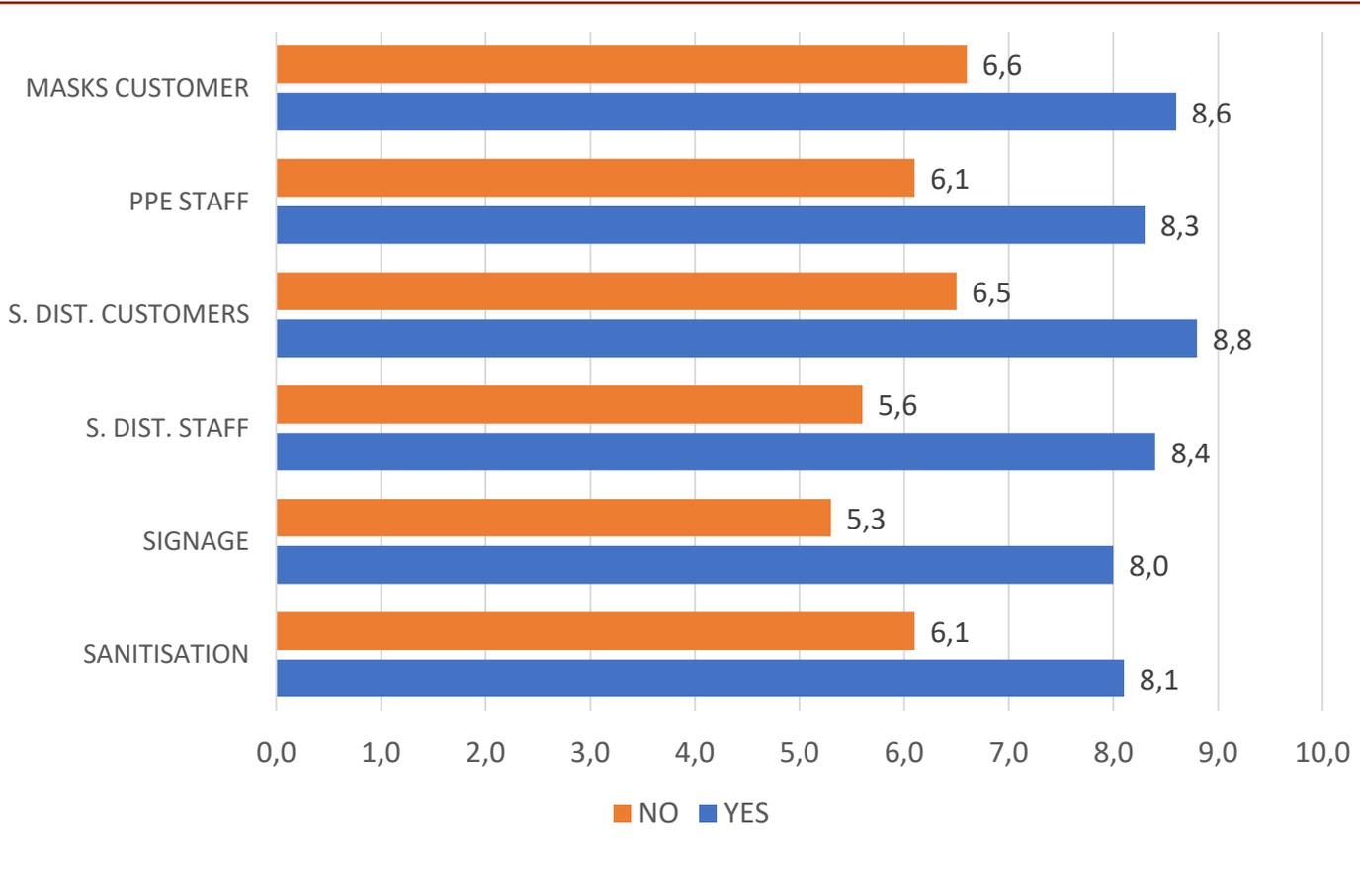
This drops to 3.7 when none of the protocols are observed. Clearly driving detractors.

This is a clear sign for brands about how much customers value these safety measures

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 is even higher than with safety!

Minding the gap (in marks out of 10) between fulfilling or not fulfilling each criteria shows signage and staff distancing as paramount:

Sanitisation: 1.9

Signage: 2.7

Social Distance STAFF: 2.8

Social Distance CUSTOMERS: 2.4

PPE STAFF: 2.2

Mask CUSTOMERS 2.0

COMMENTARY

What the people say!

From the mouths of customers...



High score:

“This branch is quite small but it is easy to see how many other customers are in the store due to the large windows offering unobstructed views to the inside. The layout of the store allows for easy movement for colleagues and customers alike. The colleague was professional and offered a friendly service and I was pleased with the outcome of my visit.”

VS.

Low scores:



“Despite the clear signage and measures in place there were a large number of customers and many not demonstrating commitment to Covid 19 guidelines including social distancing or wearing a mask, there needed to be a higher level of monitoring customer behaviour through staff observing customers and reminding them to follow guidelines..“

“There were absolutely no Covid-19 safety measures in place and I felt extremely vulnerable. Being in the extremely vulnerable group and visiting several locations, none of which had any safety measures in operation, it was not a good experience for me. I did complete my visits because there were no customers on site at the same time as me, but I did not feel comfortable.”

Conclusions

General performance is patchy in the UK and does not seem to be improving. 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 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 Social Distance of Staff and Signage.

On the downside there is a **1 in 5 chance of visiting a location that does not exhibit staff socially distancing**, and a **50/50 percent chance of seeing customers socially distancing** and a **40 percent chance of meeting someone not wearing a mask**. There continues to be very real concerns that the message is not getting across...

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. We hoped that standards would improve from July, customers will feel safer and recommendations will flow, but that is not the case. For now it looks like we all need to try a harder to do 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.**