

COVID-19 perspective Netherlands

Do you feel safe out and about? – Part 2

MSPA Survey • 16th November 2020



Background

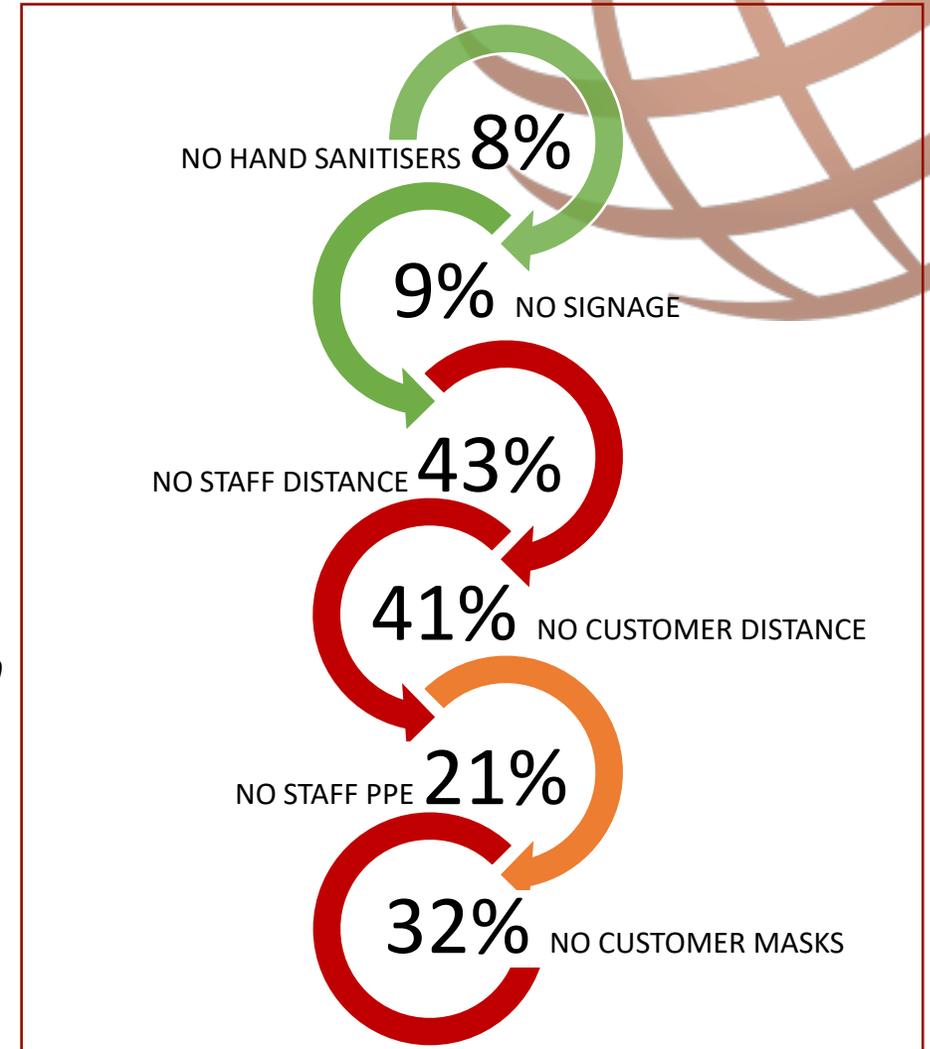


- The MSPA Europe Africa conducted surveys amongst members of the general public about their experiences when out shopping, dining and going about their daily lives, initially over two weeks from 7th to 21st July and repeated from 25th October to 13th November 2020.
- 115 interactions were assessed initially in July, with a further 146 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 very 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 The Netherlands?

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 6 out of 10 times**
- Was **SOCIAL DISTANCING** followed by the **CUSTOMERS**? – **about 6 out of 10 times**
- Did staff have **PERSONAL PROTECTION OR SCREENS** to prevent infection? – **8 out of 10 times**
- Did all customers wear **MASKS** to prevent infection? – **7 out of 10 times**



Mind the Gaps... what does this mean?

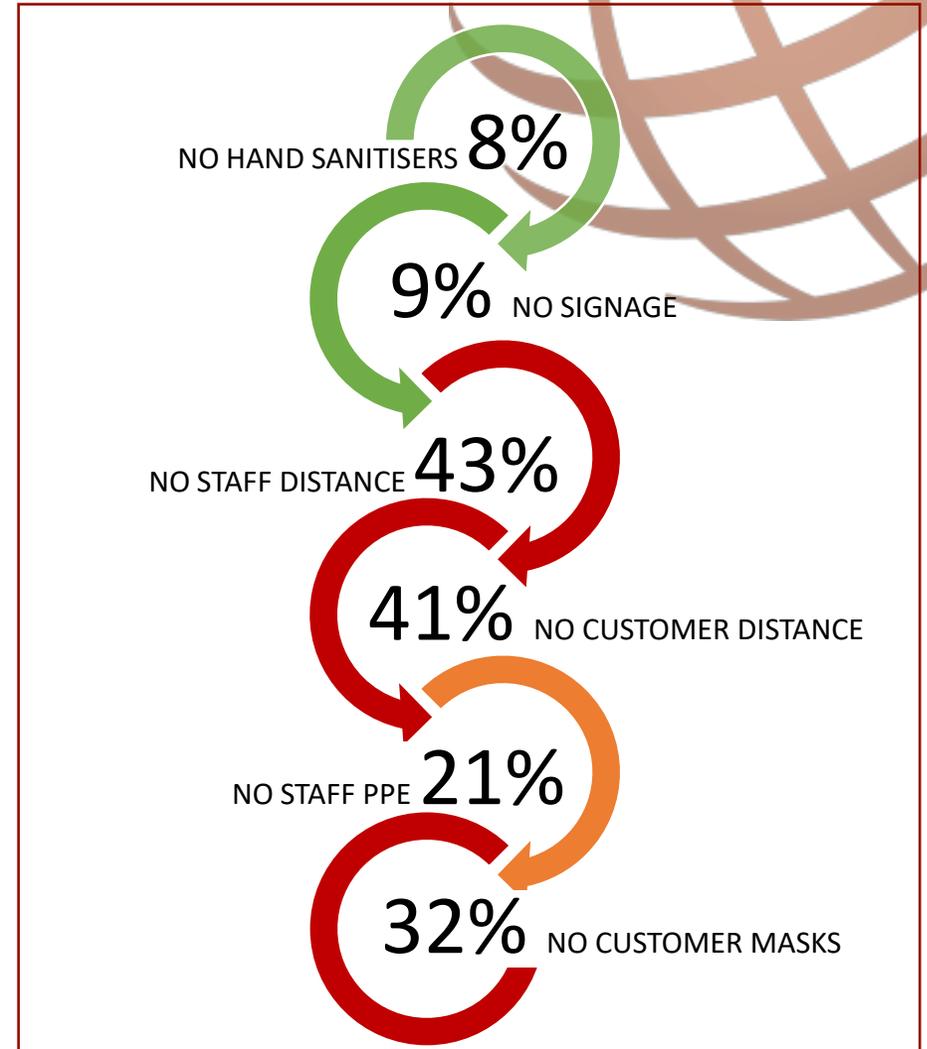
With gaps in our collective ability to observe the hygiene factors required, there will be an inevitable impact on our health and our economy.

12% 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 7.8 out of 10!

On the surface this seems low, both of these measures have changed little 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?



SAME LEVELS OF
SANITISATION

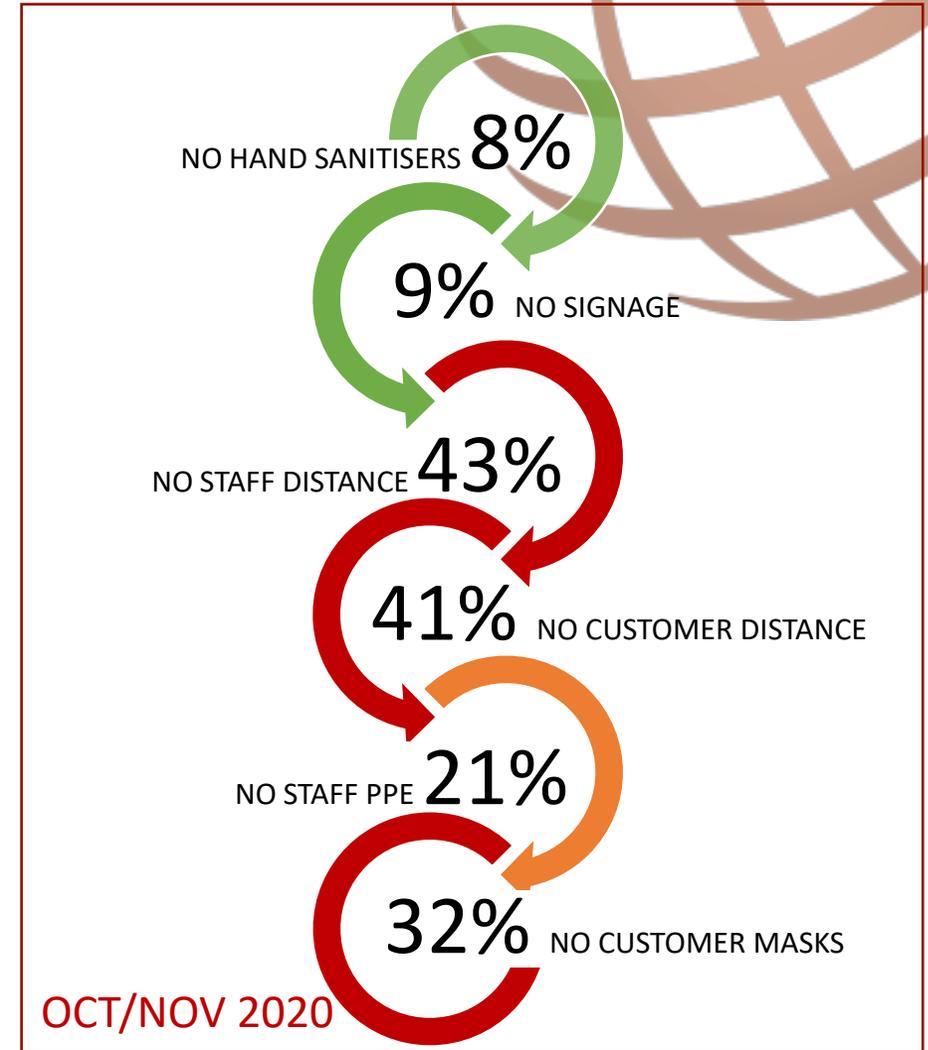
REDUCED LEVELS OF
SIGNAGE

NO CHANGE IN
STAFF DISTANCING

IMPROVED BUT LOW
LEVELS OF CUSTOMER
DISTANCING

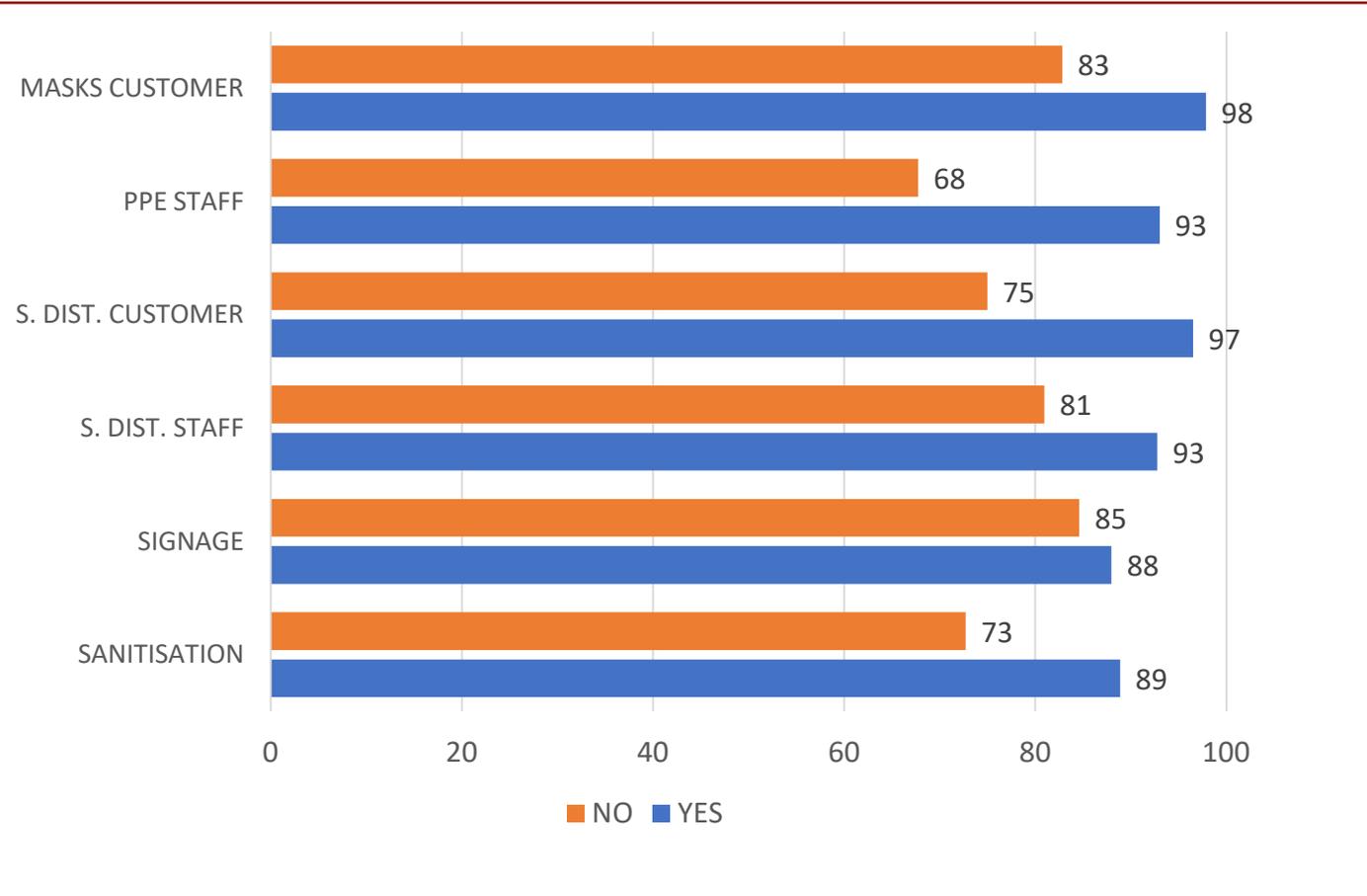
REDUCED
LEVELS OF PPE

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: 16

Signage: 3

Social Distance STAFF: 12

Social Distance CUSTOMERS: 22

PPE STAFF: 25

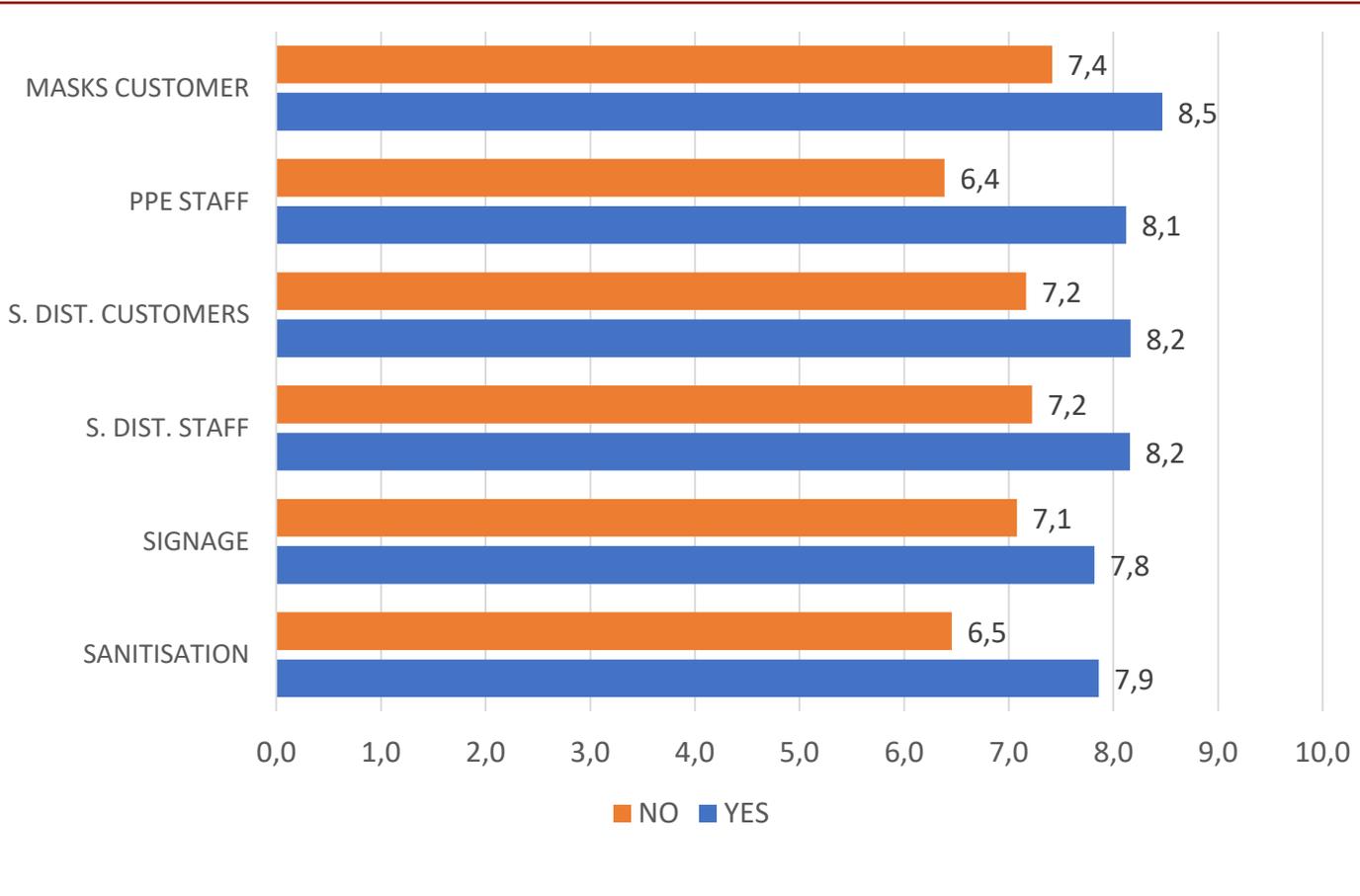
Masks CUSTOMER: 15

Clearly social distancing and mask wearing have the most impact on perception

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 Sanitisation are most important:

- Sanitisation: 1.4
- Signage: 0.7
- Social Distance STAFF: 0.9
- Social Distance CUSTOMERS: 1.0
- PPE STAFF: 1.7
- Mask CUSTOMERS 1.1

COMMENTARY

What the people say!

From the mouths of customers...



High score:

“De winkel was groot genoeg. Er waren duidelijke richtingen in de paden aangegeven. De medewerkers droegen mondkapjes.”

Translated “The store was big enough. There were clear directions in the aisles. The employees wore masks.”

VS.

Low scores:



“Dit bedrijf heeft matig gemotiveerde medewerkers. Gevolg is dat richtlijnen slechts beperkt worden nageleefd.”

Translated:-” This company has moderately motivated employees. As a result, guidelines are only adhered to to a limited extent.”

“The salesperson did not respect the 1,5m limit and did not wear his mask properly. I said I wanted to maintain social distance and after that it was okay.”

Conclusions

General performance has hardly improved in The Netherlands. 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 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, however this seems not 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.