

COVID-19 perspective PT

Do you feel safe out and about? – Part 2

MSPA Survey • 13th November 2020



Background

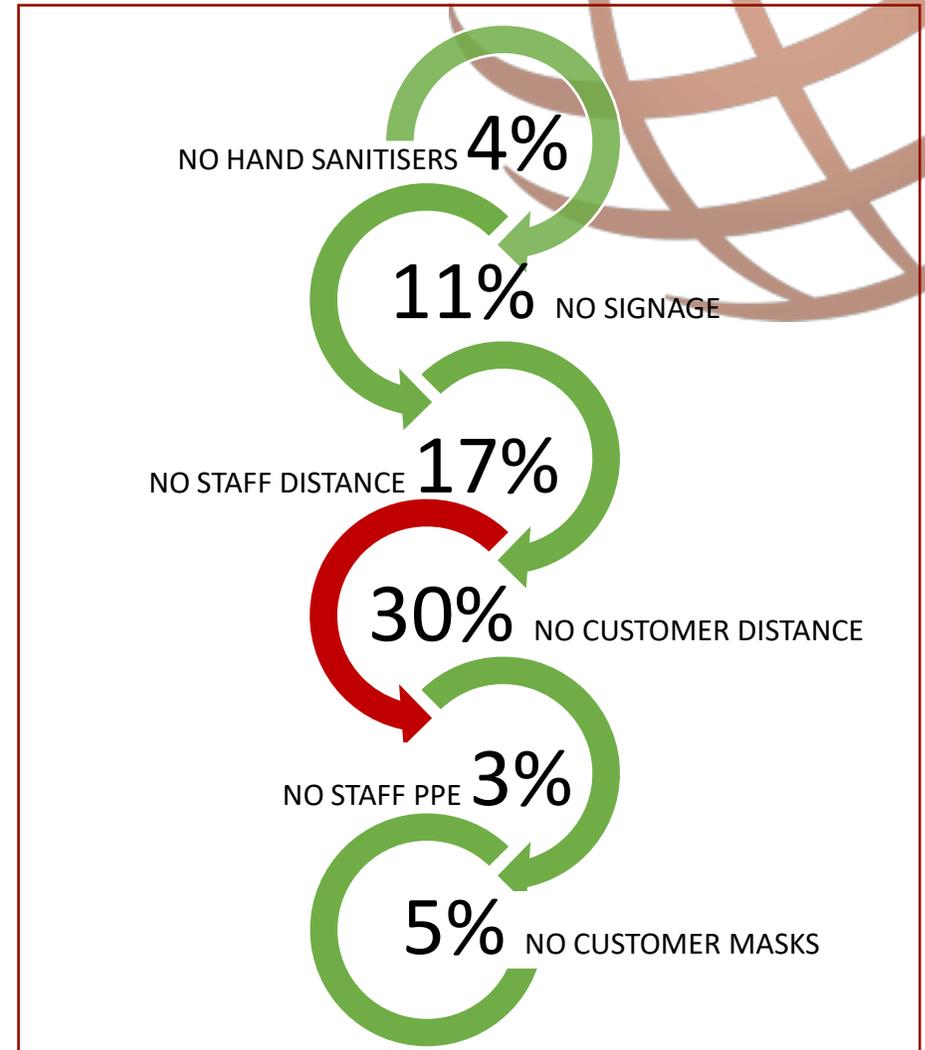


- The MSPA Europe Africa conducted surveys amongst members of the general public about their experiences when out shopping, dining and going about their daily lives, initially over two weeks from 7th to 21st July and repeated from 25th October to 9th November 2020.
- 1.158 interactions were assessed in July and a further 713 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 PT?

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

- Was **SANITISATION** equipment available to you? (gels, sprays, dispensers) – **9.6 out of 10 times**
- Was clear **SIGNAGE** regarding social distancing on display? – **about 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**? – **7 out of 10 times**
- Did staff have **PERSONAL PROTECTION OR SCREENS** to prevent infection? – **nearly all the time!**
- Did all customers wear **MASKS** to prevent infection? – **9.5 out of 10 times**



Mind the Gaps... what does this mean?

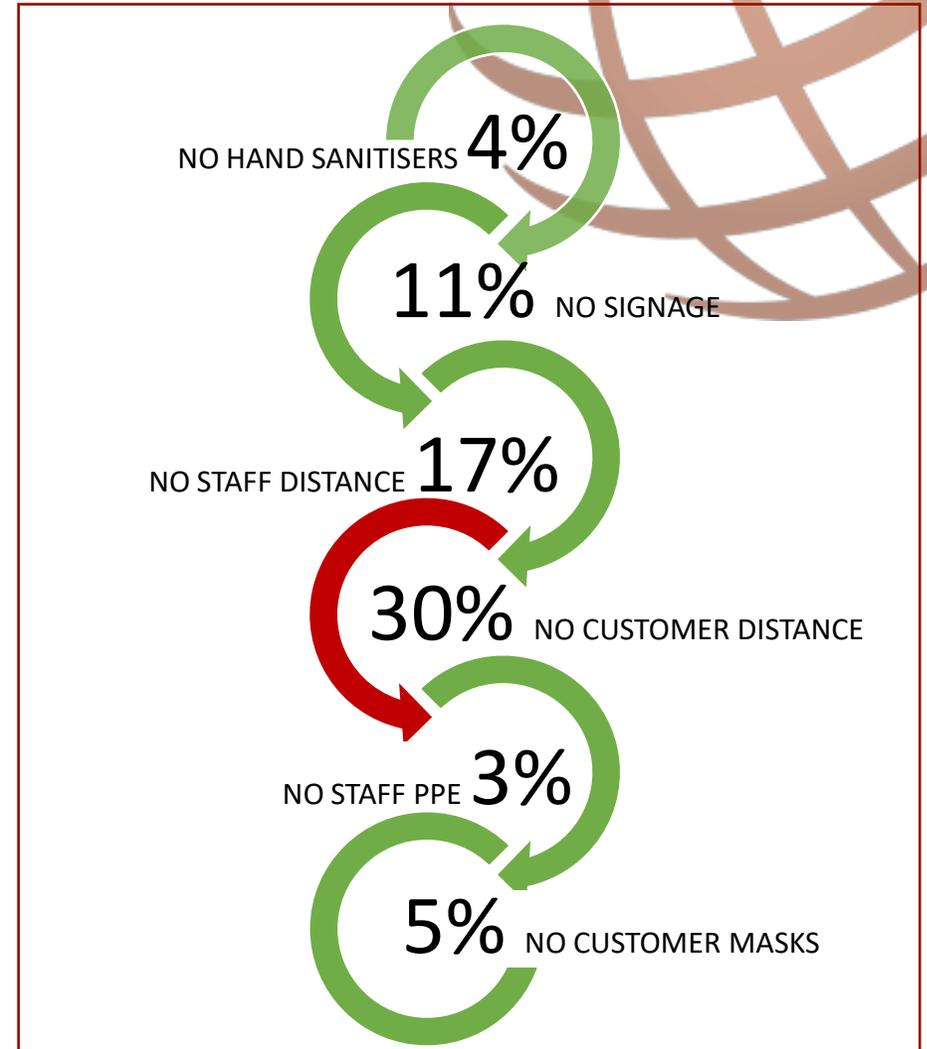
With fewer gaps in our collective ability to observe the hygiene factors required, there will be an inevitable impact on our health and our economy.

7% of customers said they actually felt unsafe to complete their transaction

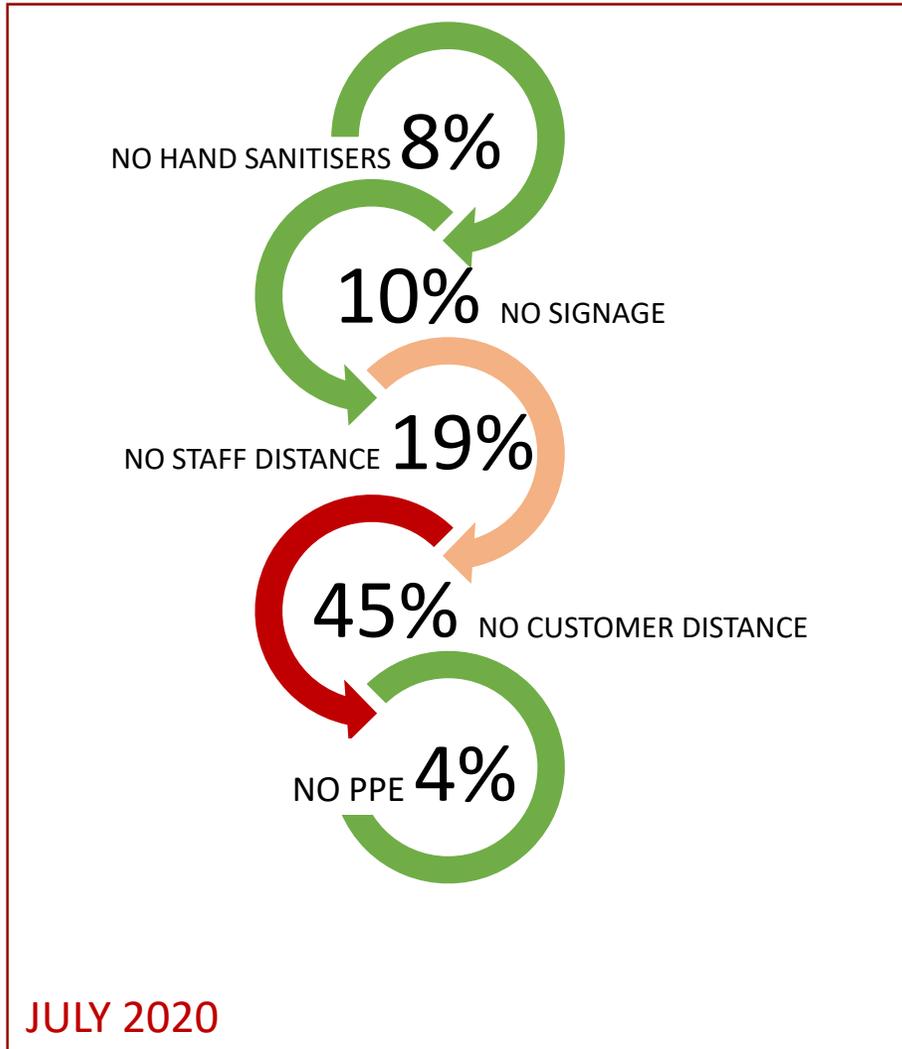
Nonetheless that means under 1 in 10 customer revenue is potentially lost...

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?



MORE
HAND SANITISERS

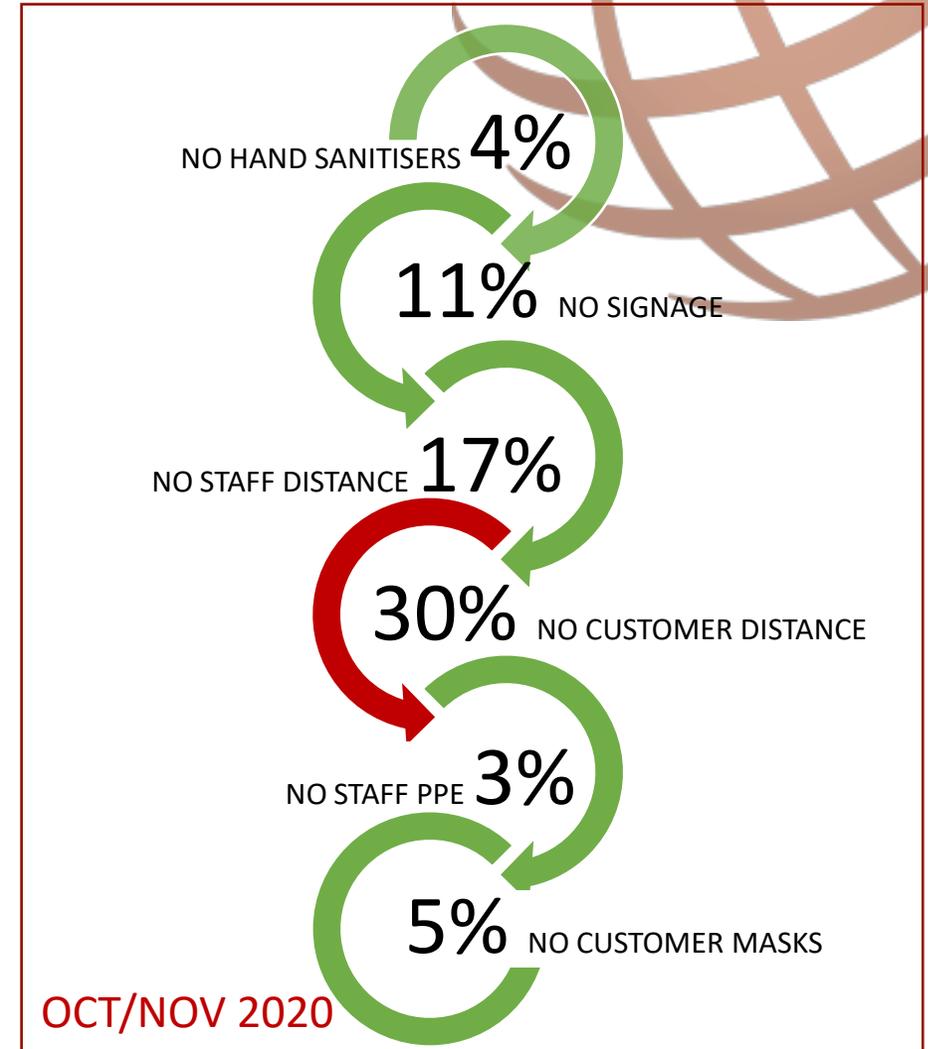
SIMILAR LEVELS OF
SIGNAGE

MARGINALLY BETTER
STAFF DISTANCING

BETTER BUT STILL POOR
CUSTOMER DISTANCING

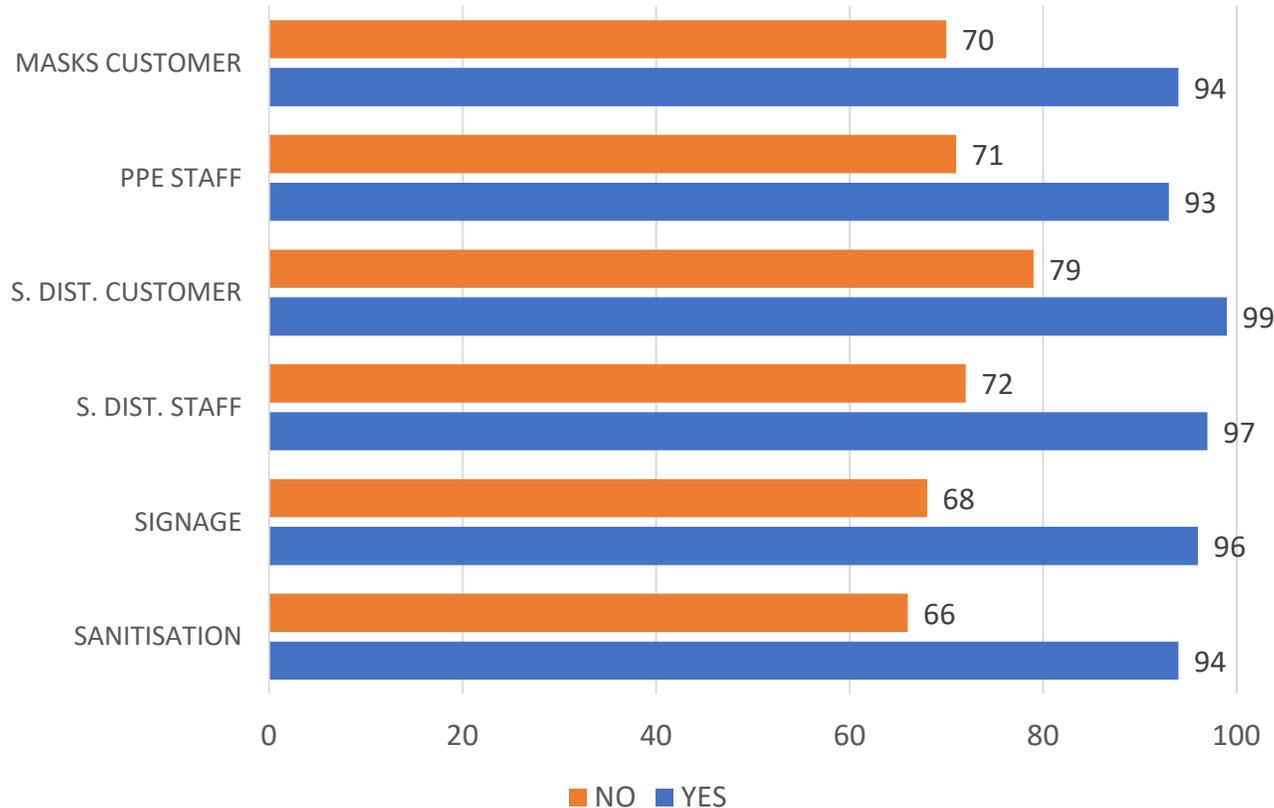
SIMILAR LEVELS OF PPE

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 by over 20%

The gaps show all elements are important but these have the most impact:-

Sanitisation: 28

Signage: 28

Social Distance STAFF: 25

Social Distance CUSTOMERS: 20

PPE STAFF: 22

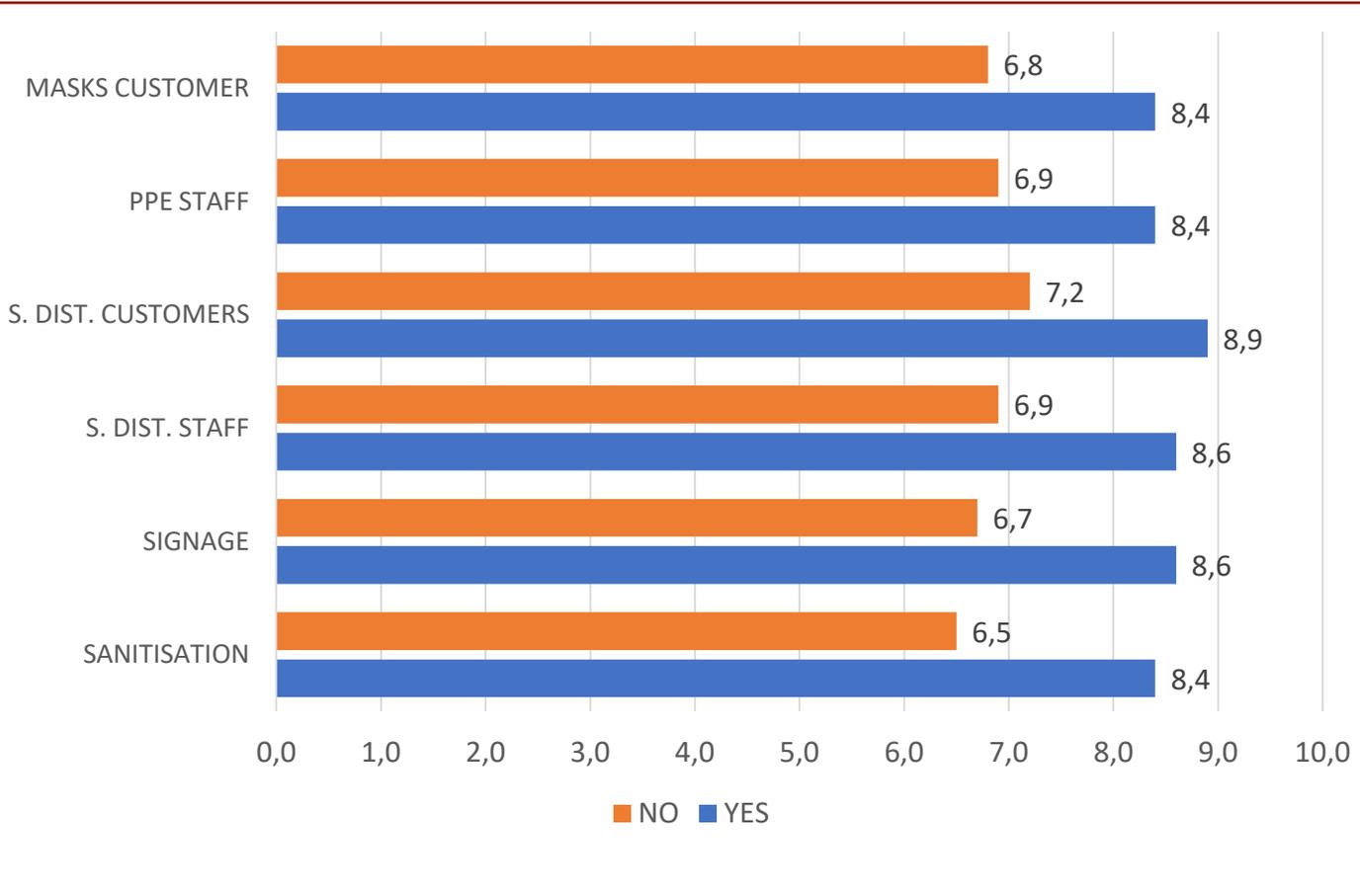
Masks CUSTOMER: 24

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

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!

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

Sanitisation: 1.9

Signage: 1.8

Social Distance STAFF: 1.7

Social Distance CUSTOMERS: 1.6

PPE STAFF: 1.5

Mask CUSTOMERS 1.7

COMMENTARY

What the people say!

From the mouths of customers...



High score:

"I felt really safe in this site. There was available sanitisation equipment at the entrance, everyone was wearing face masks and keeping the distance."

VS.

Low scores:



"I've seen costumers without a mask when there's no security. Just one or two, but its's enough.."

"Despite the fact that it is clearly indicated that there is a minimum distance in place with dedicated marks on the floor, not only do people NOT respect them but it's also no reinforcing measurements taken from the staff that many times see the queue building with less than the expected parameters.

"It feels that the measurements taken were the bare minimum ones, when there could be going for a step further to protect the employees better as well (I understand that the reinforcement can not be done if it's peak time but only one cashier is open - condoning the behaviours that should be condemned) "

Conclusions

General performance is good and much improved Portugal. There is however a clear opportunity to improve customer and staff distancing and 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.

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 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.