

COVID-19 perspective South Africa

Do you feel safe out and about? – Part 2

MSPA Survey • 18th November 2020



Background

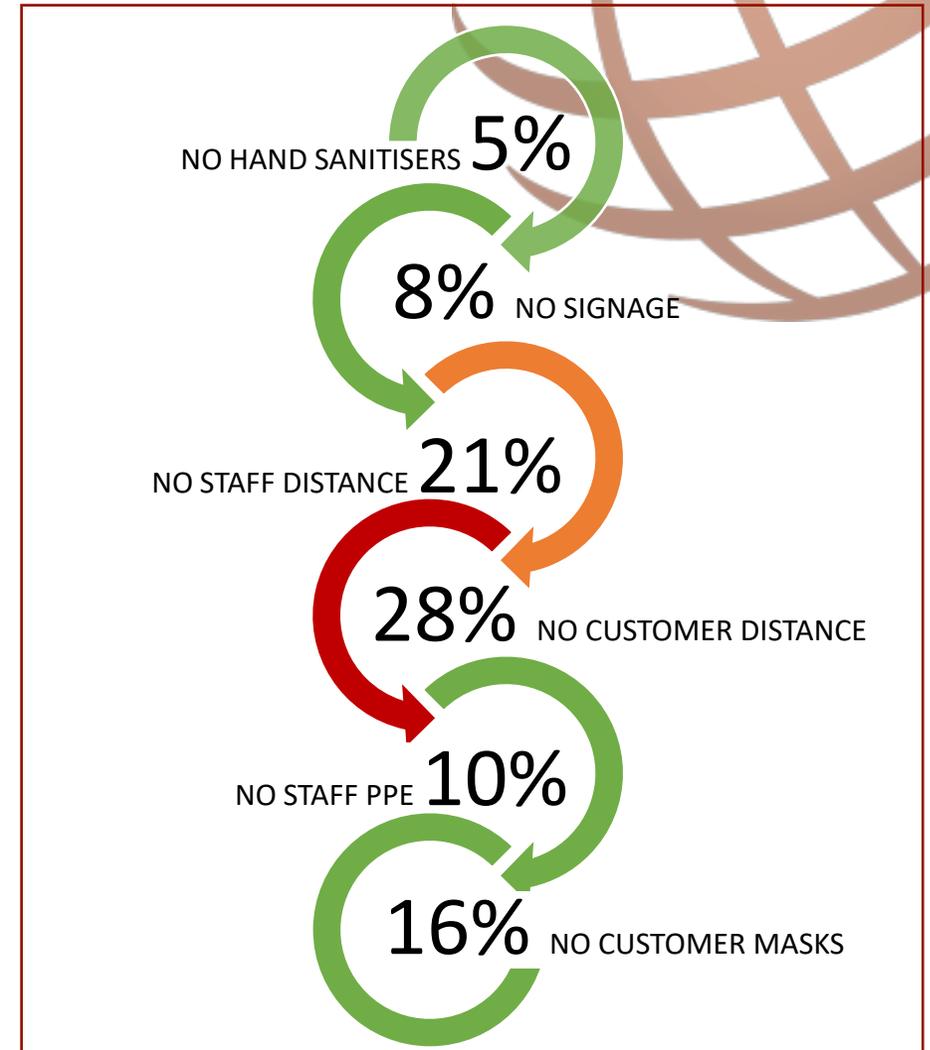


- The MSPA Europe Africa conducted surveys amongst members of the general public about their experiences when out shopping, dining and going about their daily lives, initially over two weeks from 7th to 21st July and repeated from 25th October to 13th November 2020.
- 66 interactions were assessed initially in July, with a further 87 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 mixed and declining 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 South Africa?

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

- Was **SANITISATION** equipment available to you? (gels, sprays, dispensers) – **over 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 7 out of 10 times**
- Did staff have **PERSONAL PROTECTION OR SCREENS** to prevent infection? – **9 out of 10 times**
- Did all customers wear **MASKS** to prevent infection? – **over 8 out of 10 times**



Mind the Gaps... what does this mean?

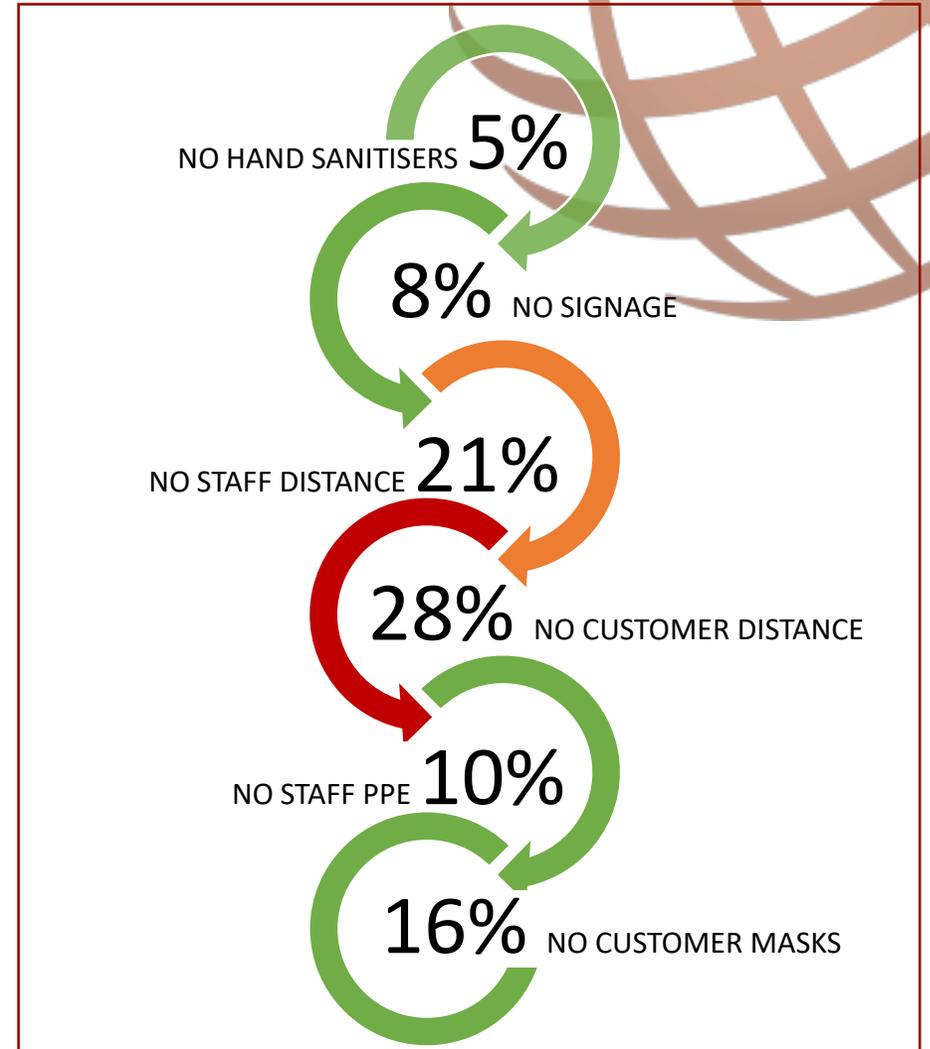
With some gaps in our collective ability to observe the hygiene factors required, there will be an inevitable impact on our health and our economy.

10% of customers said they actually felt unsafe to complete their transaction

that means 1 in 10 customer revenue opportunities are potentially lost...

The recommendation rate is 8.1 out of 10!

On the surface this seems okay, both of these measures have moved only a 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?



LOWER LEVELS OF
SANITISATION

LOWER LEVELS OF
SIGNAGE

SIMILAR LEVELS
OF STAFF DISTANCING

DECLINING LOW LEVELS
OF CUSTOMER
DISTANCING

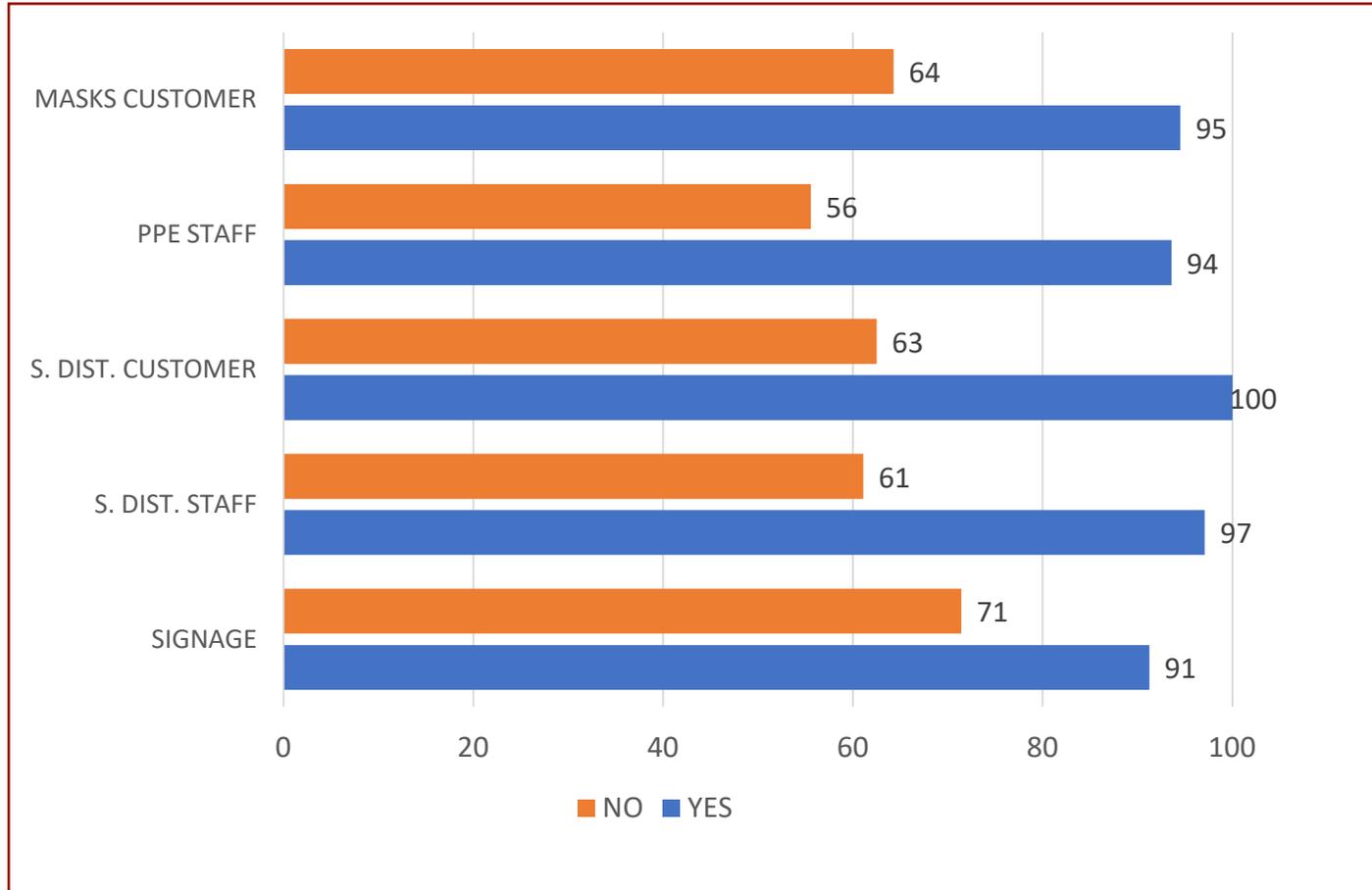
LOWER
LEVELS OF PPE

GAPS
IN MASK WEARING



What is most important in terms of safety perception?

How do 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:-

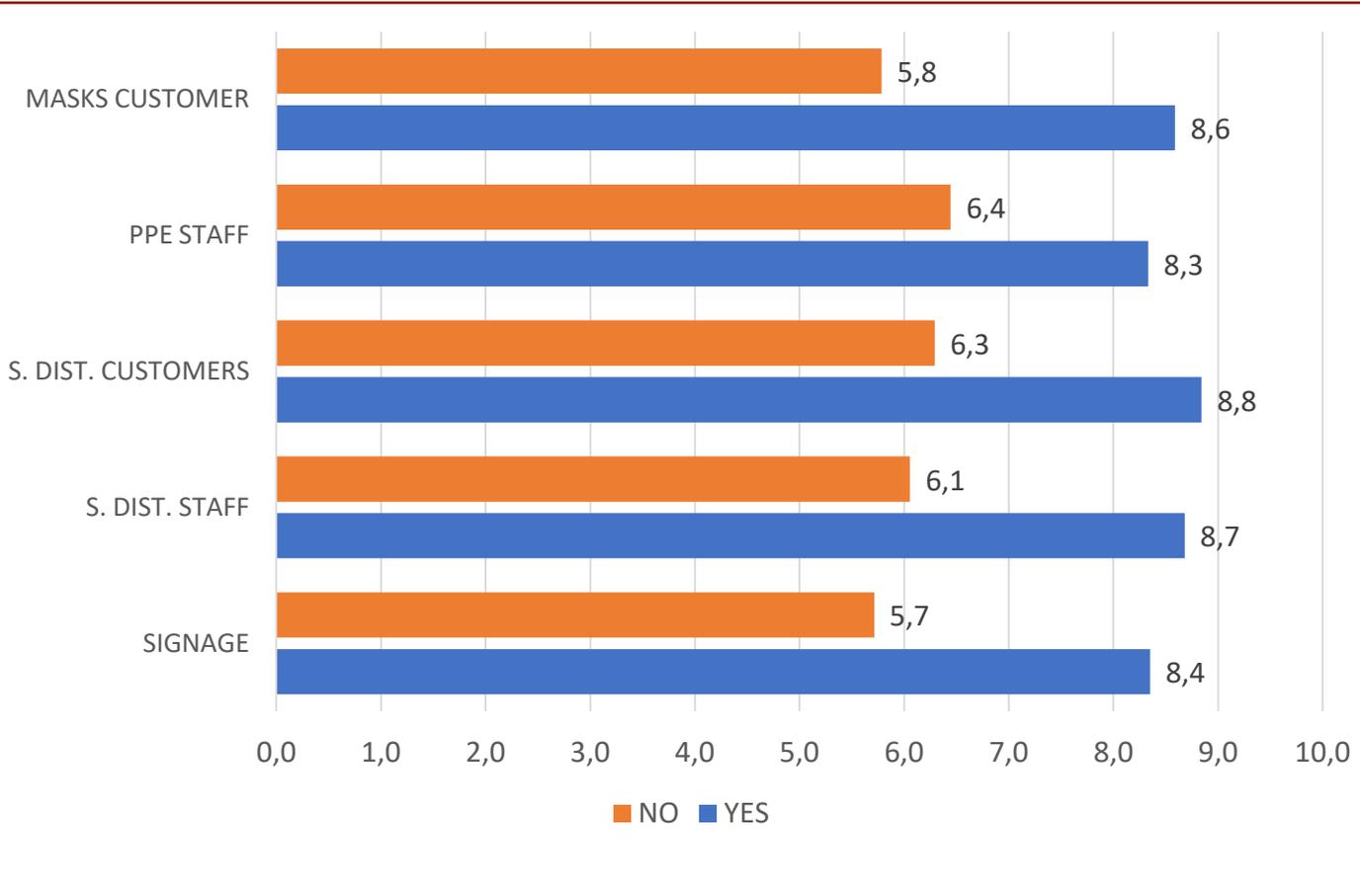
- Signage: 20
- Social Distance STAFF: 36
- Social Distance CUSTOMERS: 37
- PPE STAFF: 38
- Masks CUSTOMER: 31

Clearly these elements have an impact on perception 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)



The difference (in marks out of 10) between fulfilling or not fulfilling each criteria shows all have a significant impact on recommendation

Signage: 2.7
Social Distance STAFF: 2.6
Social Distance CUSTOMERS: 2.5
PPE STAFF: 1.9
Mask CUSTOMERS 2.8

COMMENTARY

What the people say!

From the mouths of customers...



High score:

"I didn't have to open the door on my own, the security did. Temperature was checked as the door opened, hands were being sanitised, the customers did social distance and the cashiers were well equipped with PPE"

"The staff were actively wearing masks and sanitising the till area and areas that the customers were shopping at. The store staff were aware of all Covid Protocols and kept a good distance from me as the customer."

VS.

Low scores:



"The place is always packed, number of people allowed inside doesn't apply. No social distancing, very dirty due to over crowding, stinking and it's a (deleted)"

"The staff members at the specific site I went to did not wear masks at all, I saw customers come inside with no masks and staff members did not correct them. The sanitiser at the front of the store was not monitored and I observed many customers not sanitising and entering the store."

Conclusions

General performance has declined in South Africa. 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 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 and distancing, which is in businesses control, and the encouragement of customers to distance or to restrict numbers in a location. Without these measure 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.