

COVID-19 perspective UK
Do you feel safe
out and about?

MSPA Survey • 30th July 2020



Background

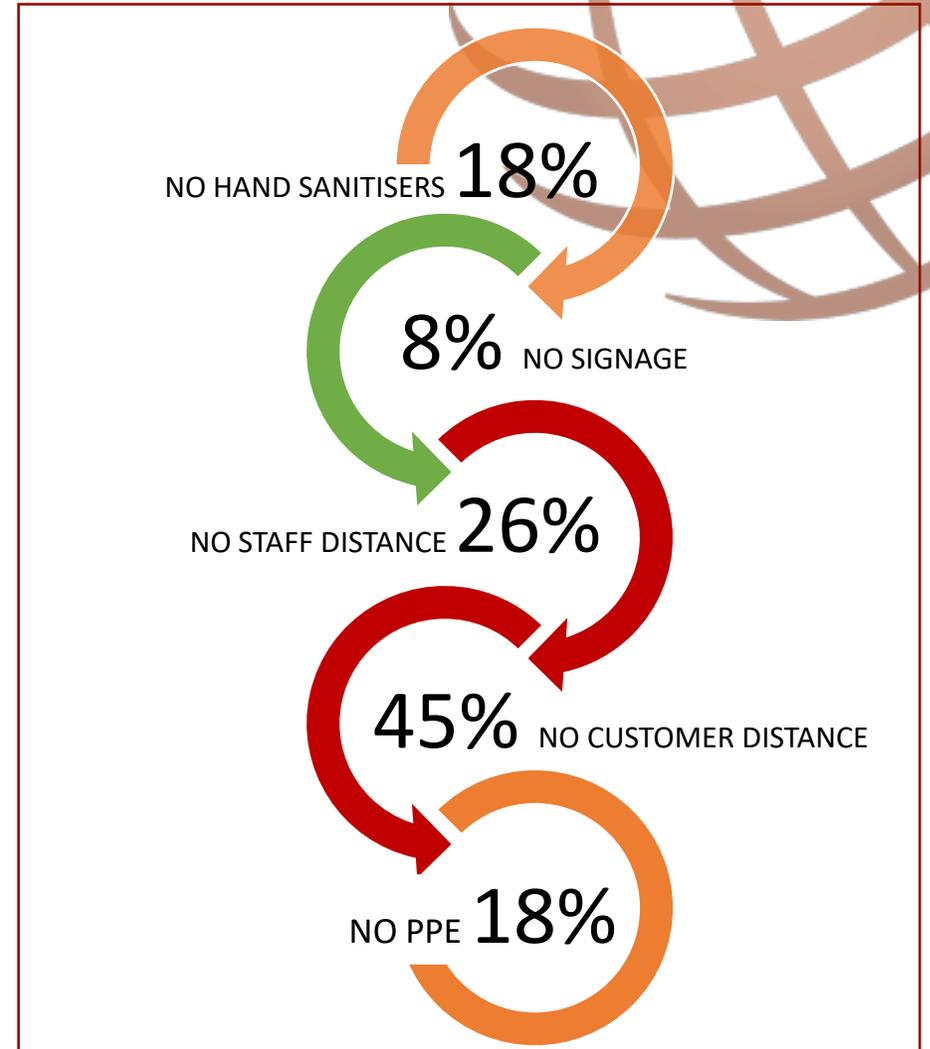


- The MSPA Europe Africa conducted surveys amongst members of the general public about their experiences when out shopping, dining and going about their daily lives, over two weeks from 7th to 21st July
- 3,200 interactions were assessed in the UK based on the principles of COVID-19 prevention of transmission:-
 - Sanitisation
 - Signage
 - Social distancing
 - PPE
- 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) – **8 out of 10 times**
- Was clear **SIGNAGE** regarding social distancing on display? – **9 out of 10 times**
- Was **SOCIAL DISTANCING** followed by the **STAFF**? – **7 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**



Mind the Gaps... what does this mean?

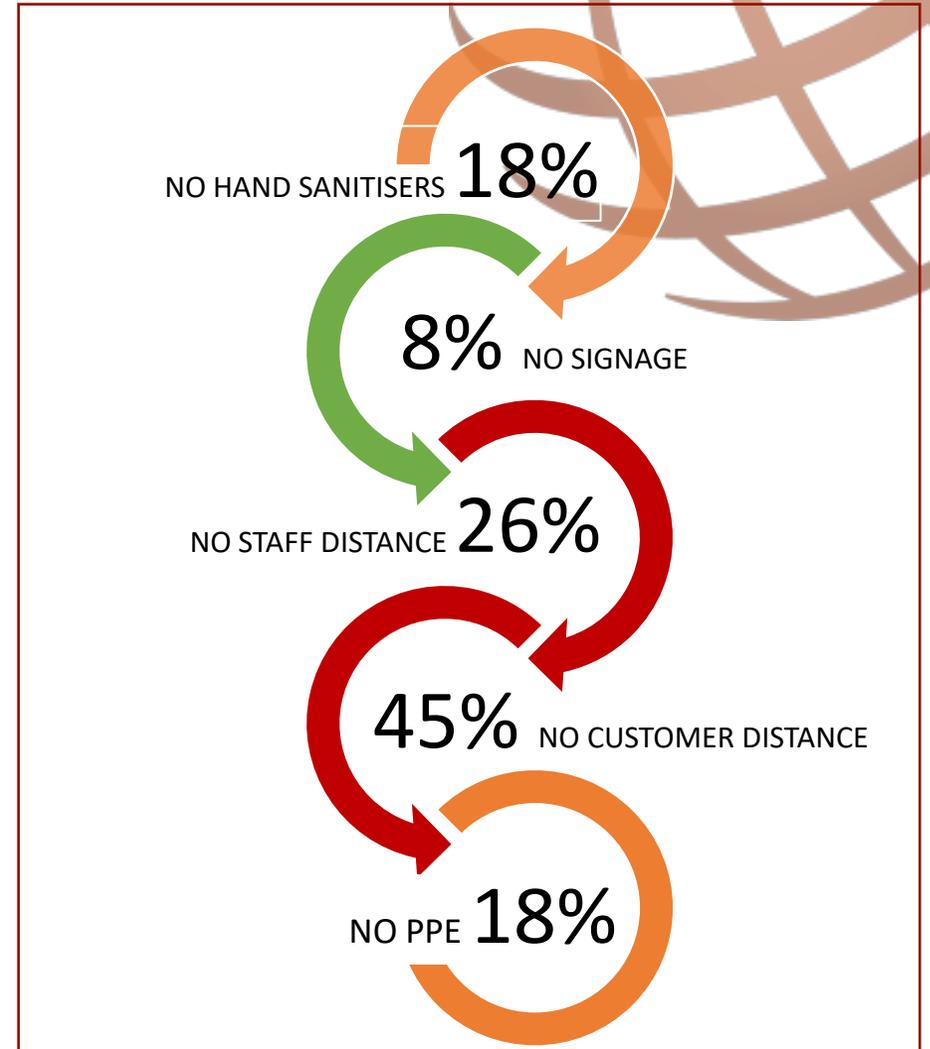
With these gaps in our collective ability to observe the hygiene factors required there will be an inevitable impact on our health and our economy.

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

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

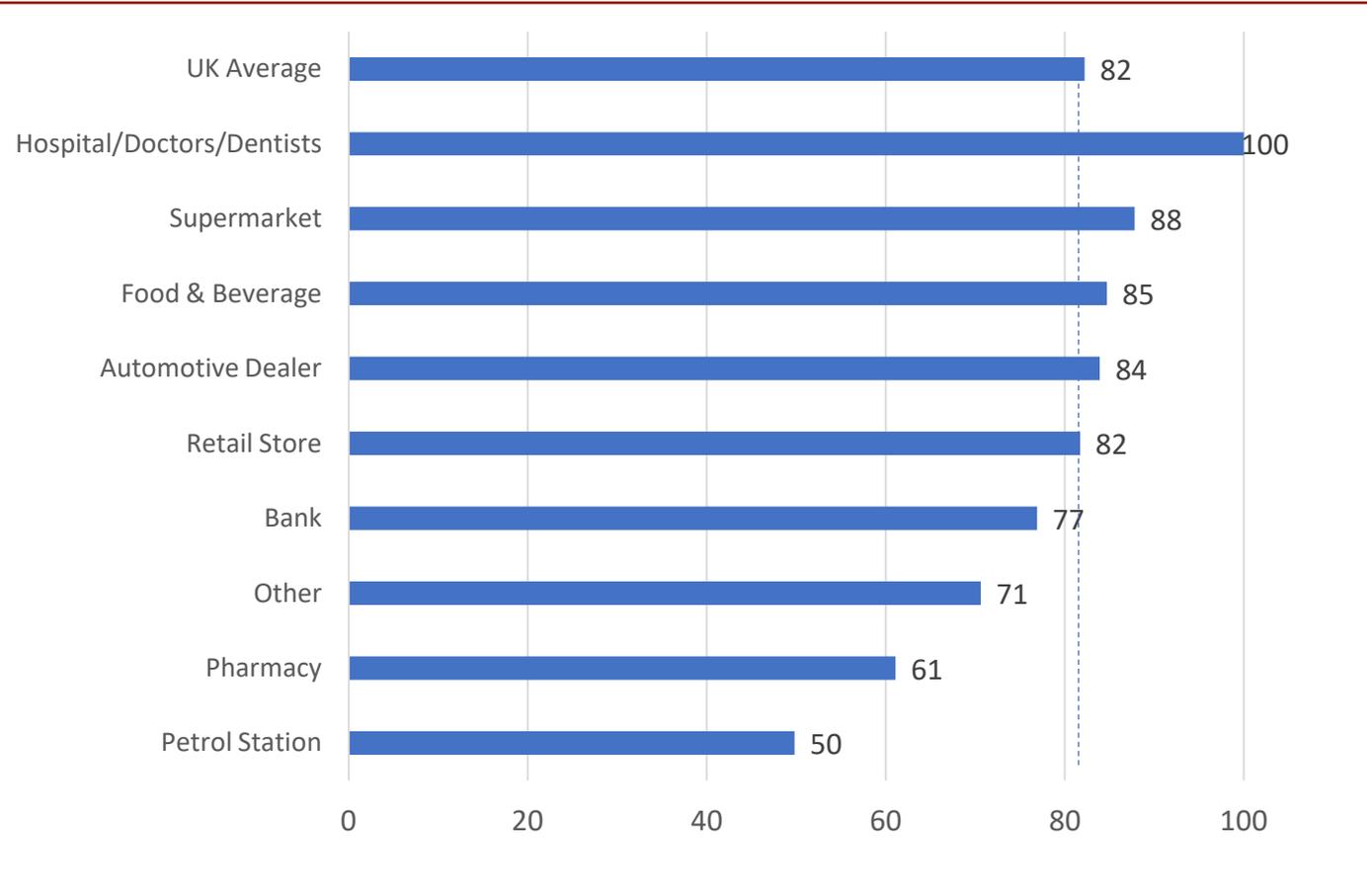
The recommendation rate is 8 out of 10!

On the surface this seems okay, but have we all missed an opportunity to make a good impression as we come out of lockdown?



What is the perspective by sector? - SANITISATION

Different sectors drive different results - SANITISATION equipment available for customers



Medical practices naturally lead the way, supermarkets perform well at 88%

Alarmingly and ironically Pharmacies score poorly at 61%!

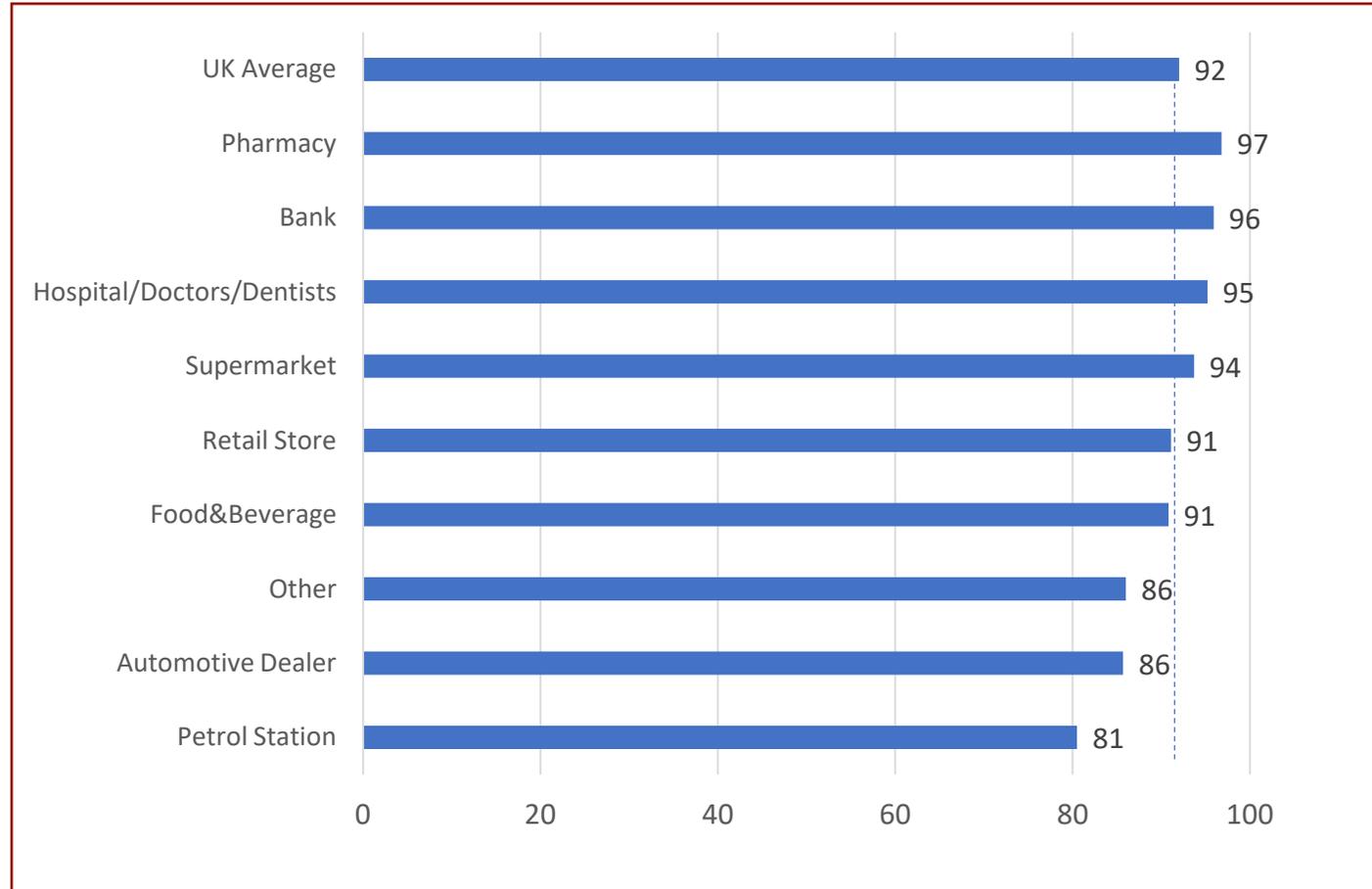
Petrol Stations are clearly below average – about half of customers did not have access to sanitisation equipment (gels, sprays, dispensers)

It isn't enough to provide sanitiser at the start of the week, receptacles need to be filled up regularly so that **all** customers can feel covid-safe

COMMENTARY

What is the perspective by sector? - SIGNAGE

Different sectors drive different results - Clear SIGNAGE regarding social distance on display



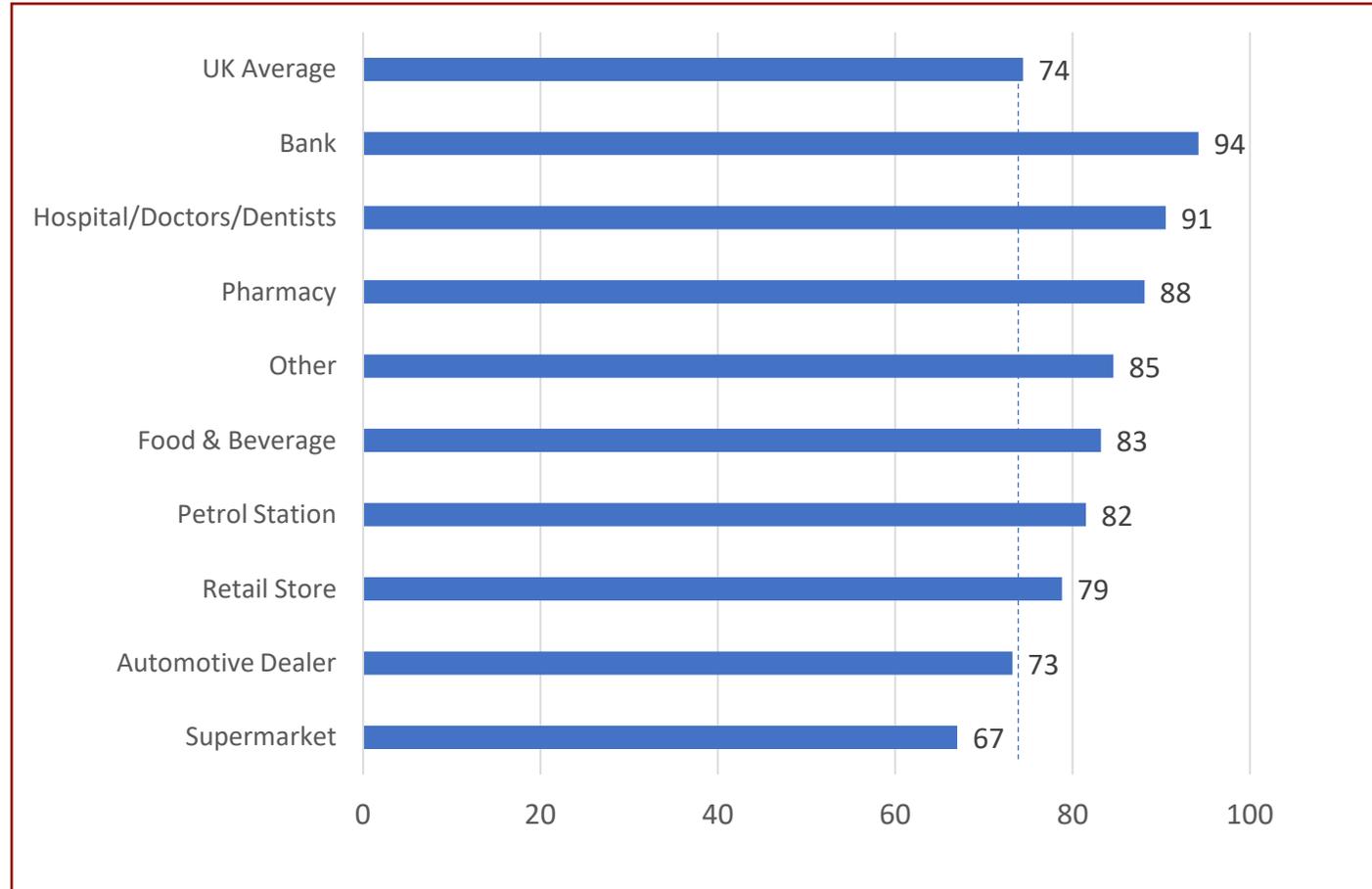
Signage scored the highest as a safety measure, although petrol stations again bring up the rear

So we should be fairly comfortable that customers and staff have reasonable instructions in place, but do they follow them?

COMMENTARY

What is the perspective by sector? – STAFF DISTANCING

Different sectors drive different results - Social Distance observed by STAFF



Despite high levels of signage on display (92%) staff are not always reading the signs! Over 1 in 4 times staff were observed not keeping a social distance

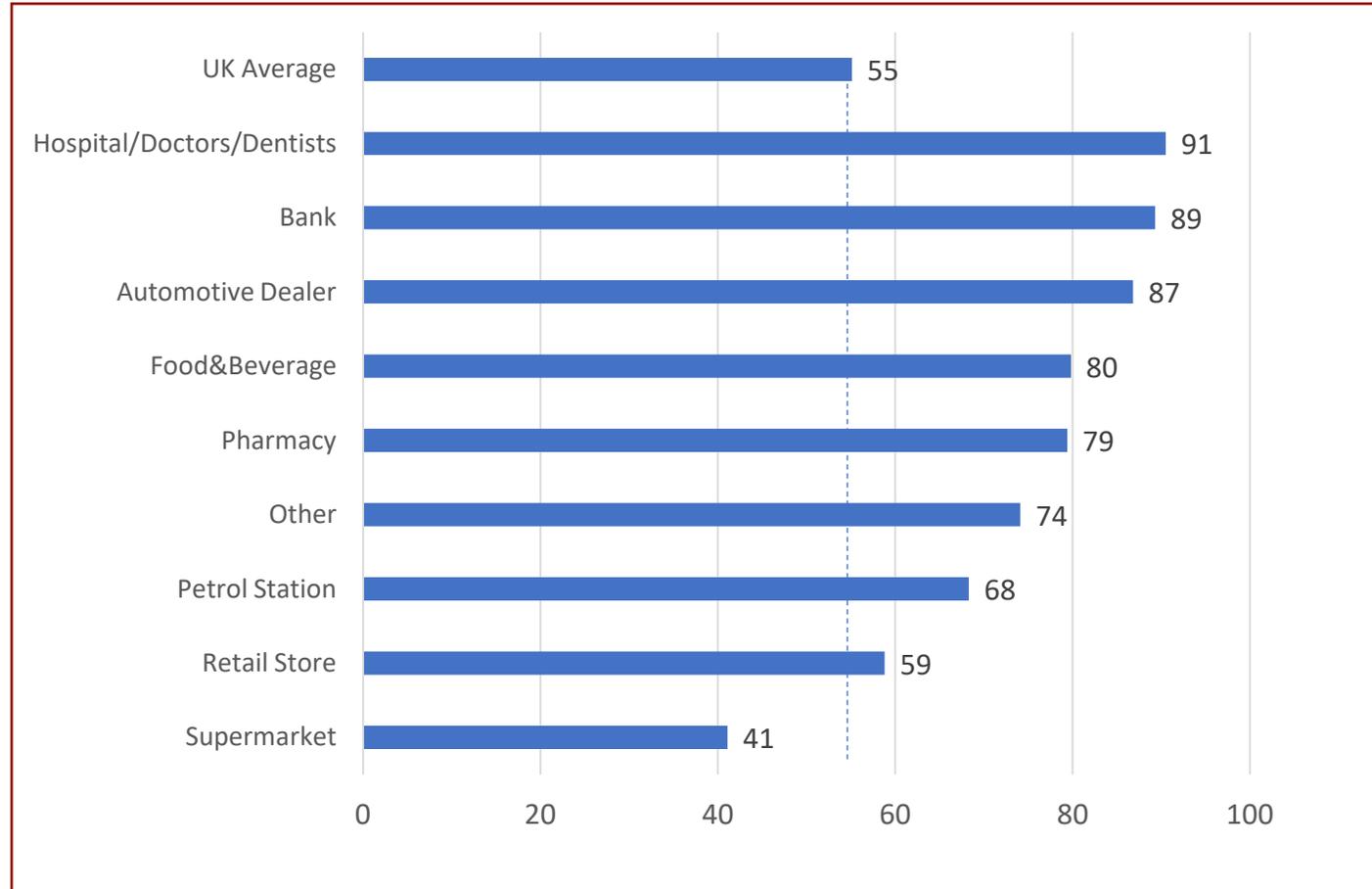
Automotive staff seem to have a problem keeping a distance at 73% or over 1 in 4 fail to keep a distance

Supermarkets in the UK are clearly underperforming. In about third of locations this was an issue

COMMENTARY

What is the perspective by sector? CUSTOMER DISTANCING

Different sectors drive different results - Social Distance observed by CUSTOMERS



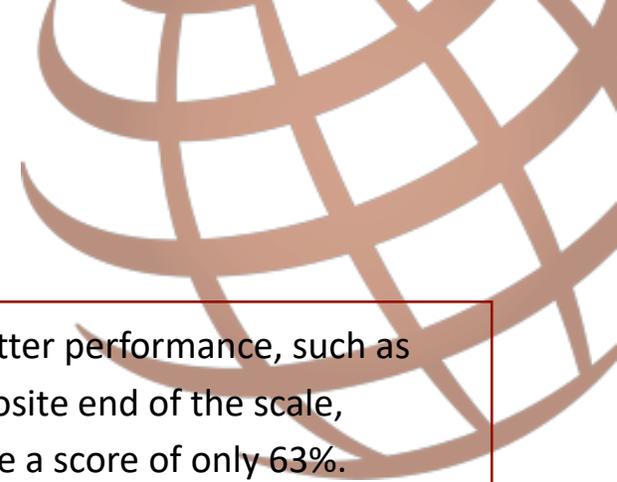
Social Distance observed by CUSTOMERS in store gets the lowest results of all the measures expected to be in place

Nearly a half of the time customer social distancing appeared not to be observed. Notwithstanding some shoppers may be in the same bubble, this is still an alarmingly high score

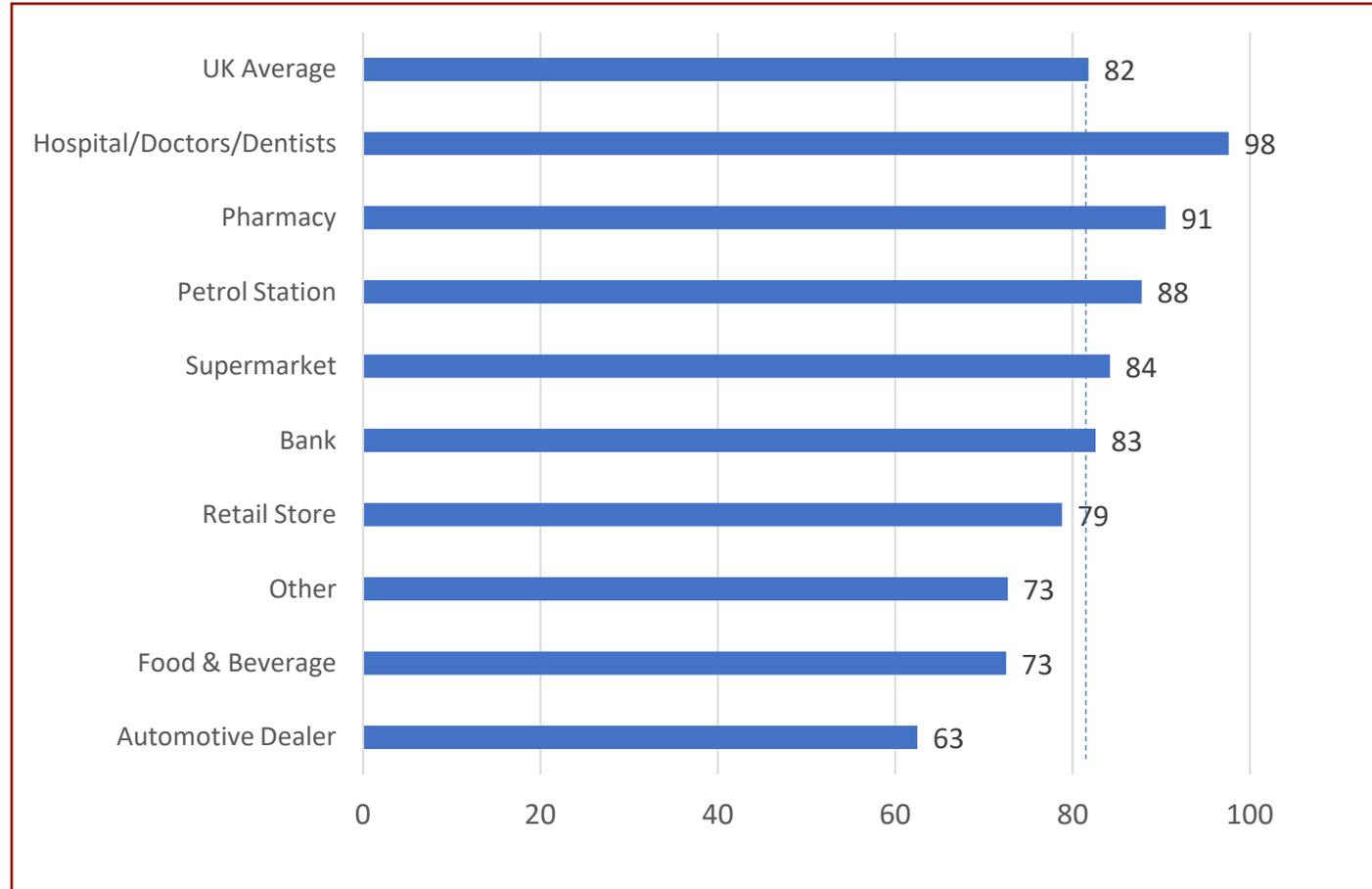
Supermarkets, an essential service, had very concerning results – In over half, nearly 6 out of 10 visits, respondents observed problems with social distance amongst customers

COMMENTARY

What is the perspective by sector? PPE for Staff



Different sectors drive different results - PPE for STAFF



Some sectors have a better performance, such as healthcare. On the opposite end of the scale, automotive dealers have a score of only 63%.

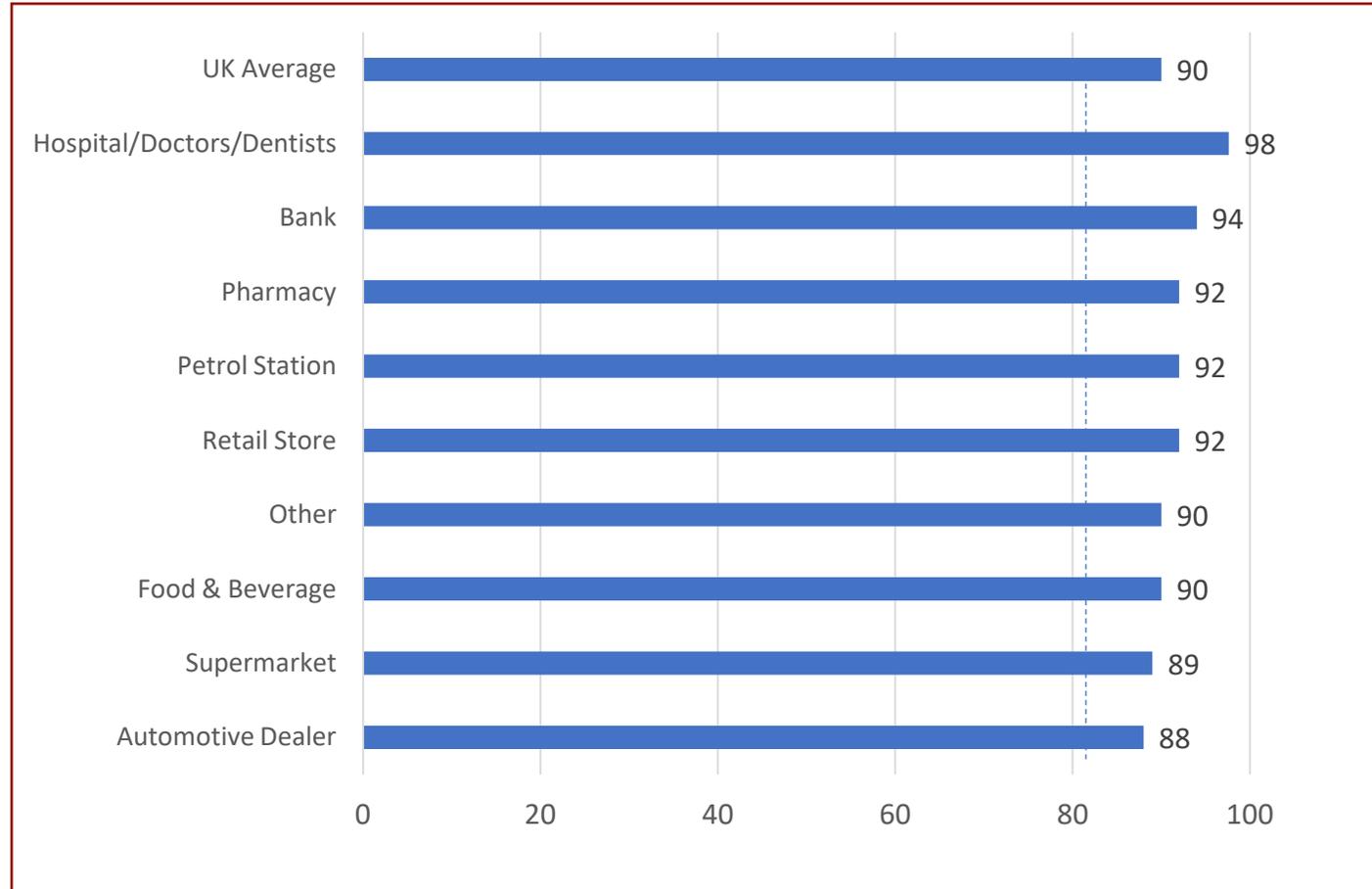
Pleasingly medical practitioners have a high incidence of PPE observed

Food and beverage is a real concern, with barely 3 out of 4 occurrences and potential risks of contamination evident

COMMENTARY

What is the perspective by sector? Perception of Safety

Different sectors drive different results - Perception of Safety



Overall feelings of safety are high, despite failures in safety measures. This we believe is because respondents observe unsafe measures but often do not believe it has a personal impact as they keep their own distance

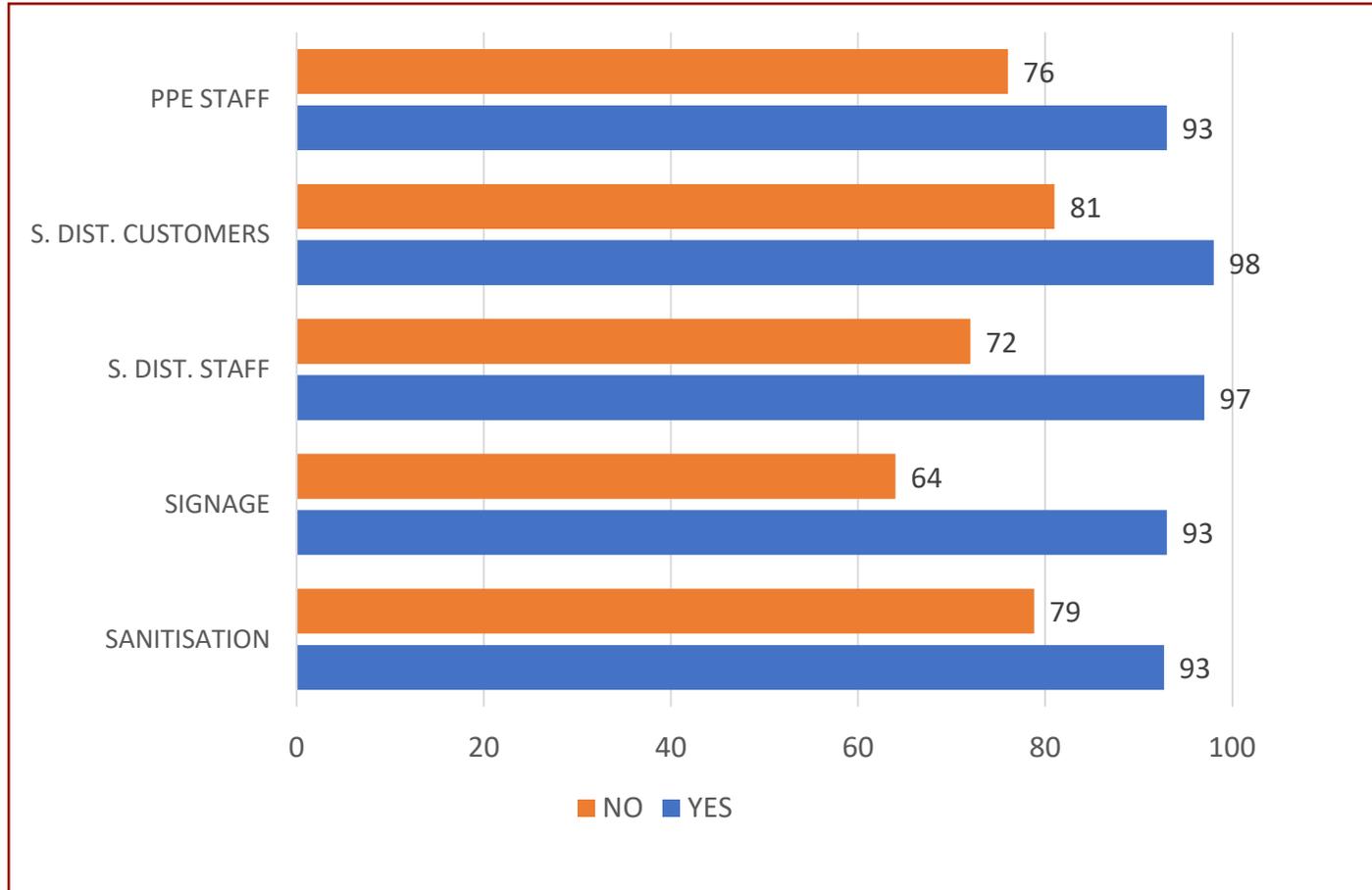
Thankfully, people feel most safe in medical facilities

And least safe in Supermarkets and Automotive dealers

COMMENTARY

What is most important in terms of safety perception?

How do each of the 5 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 Signage and Staff Socially distancing have the most impact on perception of safety with a gap in perception of 29 between when it does exist to when it does not

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

Sanitisation: 14

Signage: 29

Social Distance STAFF: 25

Social Distance CUSTOMERS: 17

PPE STAFF: 17

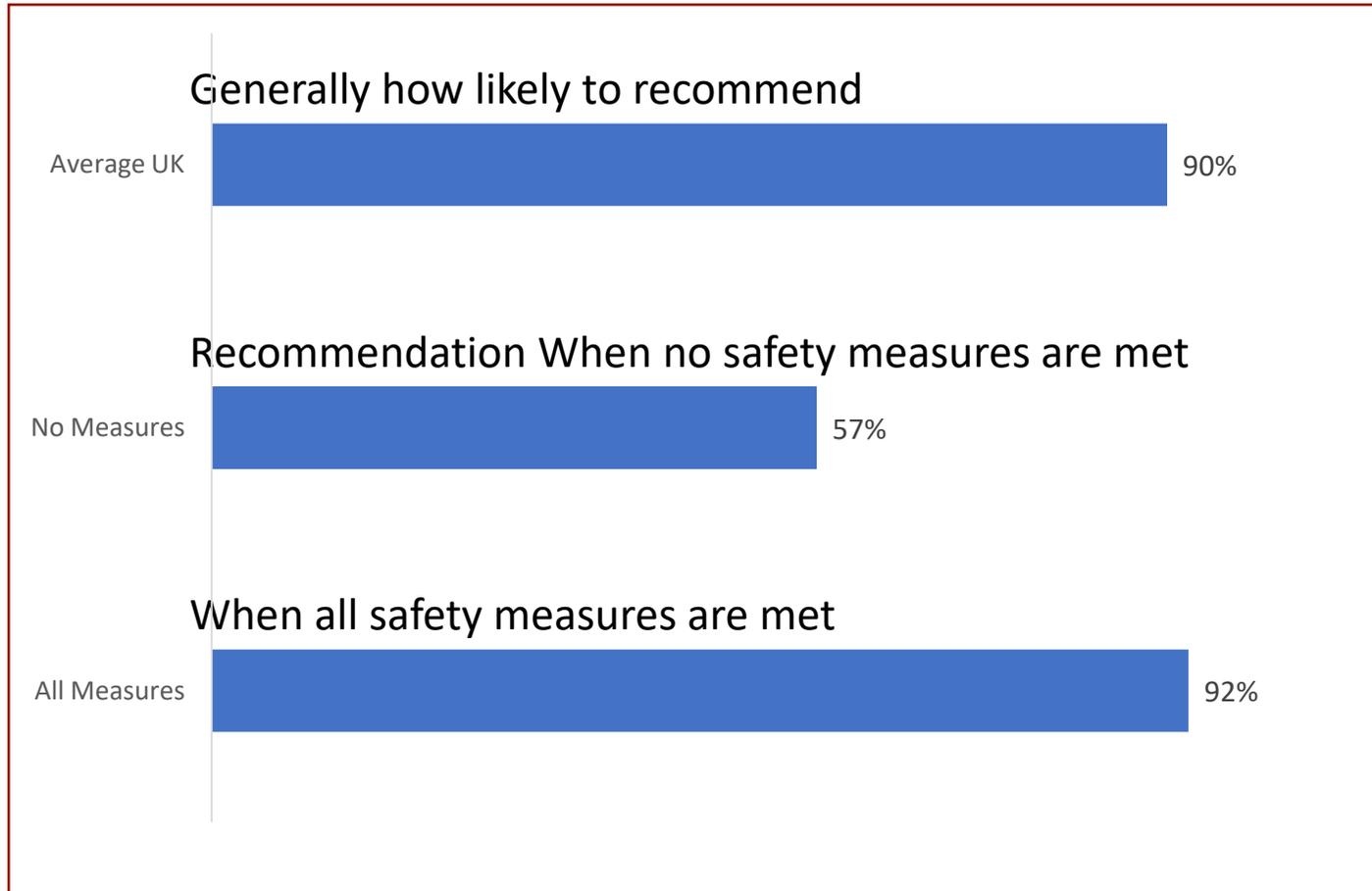
These are directly in the control of businesses and efforts must be increased to ensure customers feel safe at the point of contact

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 feel safe, with a rating of 90% on average

This drops to 57% when none of the protocols are observed. So doing things right has a massive impact on recommendation.

When everything is done to protocol then recommendation increases to 92%

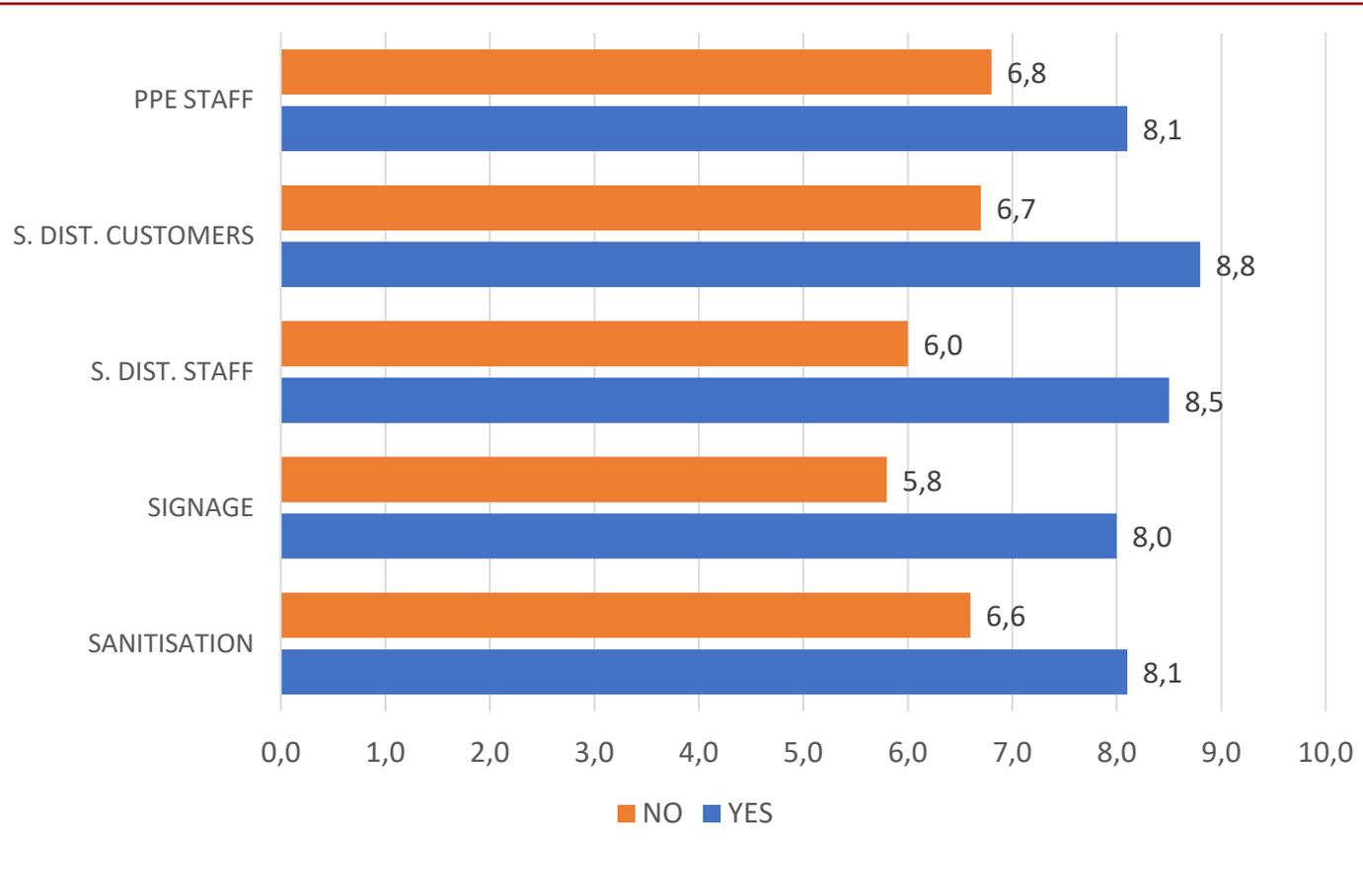
The difference between the observance of all or failure of all 5 safety measures is 35 percent points

It 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 5 safety measures impact how likely customers are to recommend? The graph bars show recommendation levels out of 10 when the safety 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: 1.5

Signage: 2.2

Social Distance STAFF: 2.4

Social Distance CUSTOMERS: 2.1

PPE STAFF: 1.3

COMMENTARY

A Regional Perspective?

How do Regions score compared to the average

	SANITISATION	SIGNAGE	STAFF DISTANCE	CUSTOMER DISTANCE	PPE	SAFETY PERCEPTION	RECOMMEND (OUT OF 10)
East of England	77.1%	91.0%	72.3%	52.9%	77.4%	89.0%	7.67
London	77.9%	89.9%	70.2%	49.1%	76.7%	89.9%	7.72
Midlands	84.2%	93.7%	77.3%	57.8%	85.7%	92.5%	8.01
West Midlands and Yorkshire	84.5%	90.7%	77.3%	57.0%	80.4%	89.0%	7.83
North West	82.3%	90.9%	69.5%	55.0%	82.5%	85.5%	7.45
Northern Ireland	89.7%	92.6%	72.1%	41.2%	73.5%	89.7%	7.54
Scotland	85.2%	93.4%	78.6%	56.0%	87.4%	95.3%	8.18
South East	82.1%	91.6%	74.8%	53.8%	83.7%	90.4%	7.89
South West	80.5%	93.0%	75.9%	59.6%	80.2%	91.0%	7.89
Wales	83.0%	93.1%	69.2%	55.3%	78.0%	89.9%	8.11
Grand Total	82.2%	91.9%	74.4%	55.1%	81.8%	90.3%	7.84

The national picture is equally patchy, with East of England and London below par on all measures and The Midlands and Scotland doing better than average by all counts.

That said, better than average may not be enough to keep us ahead of the virus and open for business...

COMMENTARY

What the people say!

From the mouths of customers...



High scores:

“Every available precaution was taken during my visit.”

“Very professional, excellent layout, clear signage and sanitizer areas, staff very aware of social distancing.”

VS.

Low scores:

“There were no Plexiglas screens. The staff member only wore a mask when they saw me wearing one. No other staff member was wearing one.”



“I only went out of necessity. Would have preferred to stay home.”

“This restaurant was not prepared and the staff were discussing that they had not had any training...and they were concerned that they did not have PPE “

Conclusions

General performance is patchy in the UK, and 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 5 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.

With a **one in 4 chance of visiting a location that does not exhibit staff socially distancing**, and a **50/50 percent chance of seeing customers socially distancing** there are very real concerns that the message is 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. Hopefully when we look again in the coming weeks and months standards will improve, customers will feel safer and recommendations will flow. For now it looks like business need to try a little harder to do the basics.

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.