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### New Nationwide Study Reveals Top Performing Brands on COVID-19 Safety: Wells Fargo, Panda Express & Whole Foods Lead Industry Verticals

Grocery, Food and Beverage, and Financial Services Top List as Best Industry Adopters of Recommended COVID-19 Precautions

**New York, NY, September 1, 2020** — Today, Ipsos, the global research firm, revealed the results from thousands of in-store visits by Mystery Shoppers aimed at understanding how various marketers are performing at making consumers feel safe in their stores. Using the Ipsos' Mystery Shoppers' findings, Ipsos launched the second wave of its Consumer Health & Safety Index: a health and safety benchmark that evaluates how retailers are operating amid the pandemic.

After visiting locations across the U.S.—from Trader Joe's to Walmart and 7-Eleven to Taco Bell—Ipsos has determined which brands have implemented adequate health and safety measures as the COVID-19 pandemic continues to spread. They identified several top performers, like Wells Fargo, which did an excellent job of installing health & safety signage reminding customers of social distancing practices; Panda Express, which excelled in ensuring near perfect compliance of employees wearing PPE properly, and Whole Foods, that maintained its #1 position on the index since wave 1 by demonstrating consistent performance across the store exterior, interior and restroom.

“We are witnessing a century-old approach to customer experience make monumental changes in a matter of weeks and months; it's really quite impressive,” said Shohini Banerjee, Senior Vice President at U.S. Channel Performance group at Ipsos. “Many of the COVID-19 precautions and improvements are not small or inexpensive—they're a complete shift in how employees behave and how products and services are distributed—a total disruption that retail has taken in stride.”



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### Key Findings

The top brands in key industries were as follows:

- **Grocery: Whole Foods** topped the grocery industry and emerged as the overall #1 brand among 33 brands measured as part of the *Index*. Whole Foods outperformed competitors in the grocery industry on several categories, including having health & safety related signage, store cleanliness, compliance with employees wearing protective gear, barriers to enforce distancing and availability of sanitizing options.
  - Employees at 76% of Whole Foods stores visited were seen actively cleaning high touch areas, as compared to an industry average of 59%
  - Associates at a 100% of Whole Foods stores visited were observed to be wearing masks properly, and 98% of customers were observed to comply with the mask policy.
  - 99% of Whole Foods stores had some sort of social distancing enforced in store, including closing every other check-out lane, closure of self-serve food & beverage stations, etc.
- **Food and Beverage:** Panda Express topped the food & beverage industry, outperforming industry competitors on health & safety related signage, compliance with employees wearing protective gear, and enforcing distancing measures.
  - 67% of Panda Express locations visited had signage reminding customers to stay 6 feet apart, and 63% had signage regarding store occupancy at the exterior, compared to industry averages of 42% and 17% respectively.
  - Staff at 96% of Panda Express locations visited were wearing masks properly, compared to the F&B industry average of 89%. Staff at 82% of Panda Express locations visited were wearing gloves, compared to the F&B average of 72%



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- 58% of the locations visited were seen to have dedicated one-way entrance / exits, compared to an industry average of 27%. 74% locations visited had plexiglass at the service counter, compared to the industry average of 56%.
- **Financial Services:** Wells Fargo emerged as the top performing brand in the financial services industry when it comes to health & safety. Wells Fargo ranked #1 among banks measured for implementing health & safety related signage and maintaining cleanliness at their banking locations
  - 96% of Wells Fargo locations visited had a sign requiring customers to wear masks, compared to the industry average of 87%.
  - Wells Fargo topped all other financial services companies in the Interior Cleanliness category, with more shoppers observing surfaces being wiped down during their visit (32%) than at any other bank

The top performers for health and safety amid the COVID-19 pandemic were:

- **Whole Foods:** Whole Foods maintained its #1 position in the second wave of the Consumer Health & Safety Index by demonstrating continued high levels of awareness and precautions to keep their customers and employees safe in store.
- **Trader Joe's:** Trader Joe's dropped one spot compared to the first wave of the *Index* and emerged as #3 on the *Index* in the second wave, demonstrating exceptional health & safety efforts on both the exterior and interior of its stores. Trader Joe's scored the highest among all 33 retailers included in the *Index* on enforcing distancing measures throughout the store journey.
- **ShopRite:** Shoprite was added as a new entrant to the second wave of the *Index* and emerged as a top performer. Shoprite demonstrated strong performance across a variety of areas, including placement of barriers in store.



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- **Costco:** Costco slipped three places in the second round of the *Index* and ranked #5, but still demonstrated strong health & safety related performance across all aspects of the in-store experience, including restrooms. Costco scored the highest among all 33 retailers included in the *Index* on installation of barriers across the customer journey.

### The top retail industries were overall ranked as follows:

1. Grocery
2. Big Box
3. Financial Services
4. Food and Beverage
5. Convenience Stores

“While these changes have been impressive, wave 2 of the Consumer Health and Safety Index revealed that, surprisingly, even among brands that are generally considered to be doing a ‘good job’ in their COVID-19 prevention efforts, there are still fairly lax safety protocols on the ground level, particularly when it came to sanitization, cleanliness, and restrooms,” said Banerjee.

### Some notable data points include:

- Only one in three retailers (33%) provided hand sanitizer inside the store entrance and roughly one in four provided hand sanitizer at checkout (28%), the #2 driver of trust among consumers.
- Only one in four retailers (28%) had restrooms with visible and up to date cleaning schedules displayed, which is one of the top 5 drivers of trust among consumers.
- 60% of the retailers visited were not observed to have employees cleaning high touch areas with disinfectant, the #3 driver of trust among consumers.
- One in five retailers visited (19%) had no social distancing reminders present inside stores, a top 5 driver of consumers returning to stores.



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### About the Study

**As a leading market research and mystery shopping firm, Ipsos is launching the second wave of the Consumer Health & Safety Index; a health and safety benchmarking study that helps:**

- **Measure:** Measure your brand's performance against current consumer expectations via mystery shops.
- **Benchmark:** Benchmark your brand against industry and cross-industry standards.
- **Take Action:** Access your brand's site-level compliance data so you can take action and improve.

### The study was designed in two stages:

- **Stage 1:** Ipsos conducted a survey of 2,000 Americans between July 7th and 8th to understand which health and safety attributes are most important to consumers in the current retail environment.
- **Stage 2:** Ipsos conducted mystery shops to measure brand compliance to these health and safety attributes across 25+ brands in 4 key industries to report on their performance. A random sample of 75-125 locations per brand will be audited during this study, while ensuring geographical representation and a margin of error of 5-7%. While the results presented in the study have a 90% confidence level, observations contrary to the findings reported in the study may be found at individual locations and should be used as an opportunity to further improve the customer experience at these locations.





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### About Ipsos

Ipsos is now the third-largest market research company in the world, present in 90 markets and employing more than 18,000 people.

Our research professionals, analysts and scientists have built unique, multi-specialist capabilities that provide powerful insights into the actions, opinions and motivations of citizens, consumers, patients, customers or employees. Our 75 business solutions are based on primary data coming from our surveys, social media monitoring, and qualitative or observational techniques.

“Game Changers” – our tagline – summarizes our ambition to help our 5,000 clients to navigate more easily our deeply changing world.

Founded in France in 1975, Ipsos is listed on the Euronext Paris since July 1st, 1999. The company is part of the SBF 120 and the Mid-60 index and is eligible for the Deferred Settlement Service (SRD).

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