

# HEALTH & SAFETY MEASURES TO #STAYPROFITABLE

LEARN HOW LEADING BRANDS ARE  
DOING IT RIGHT

## CONSUMER HEALTH AND SAFETY INDEX

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GAME CHANGERS



# Welcome to the webinar!

## Today's presenter:



### **SHOHINI BANERJEE**

#### **Senior Vice President**

**shohini.banerjee@ipsos.com**

Shohini leads the Ipsos Channel Performance West team in the US and is heavily engaged in designing strategic programs and syndicated products across the Ipsos portfolio.

Shohini is a proven general manager, with demonstrated expertise in the CX, market research and consulting space. She brings together creativity, technical expertise, people leadership skills and a commercial focus to successfully run a book of business and has a proven track record of enabling rapid growth and customer success.

Shohini has worked with some of the world's most admired brands to shape their customer and shopper experience strategies in the Tech, Retail, Financial Services and Hospitality sectors. She holds a MS in Electrical Engineering from Stanford University and serves on the Advisory Board of the Center for Innovation Education at Rutgers University,



# THE PROBLEM

**As the economy was reopening, we asked ourselves...**



**What are the key health & safety measures  
brands can take to #stayopen and  
#stayprofitable?**



# Learnings that we will share with you

**01.**

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How are consumer attitudes towards health & safety evolving?

**02.**

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What are top performing industries and brands doing to keep consumers safe?

**03.**

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What does the future of health & safety look like, and what can your brand do to keep up?

# Health & Safety is still relevant and top of mind in September 2020

**2 in 5**

Globally don't see life "returning to normal" for at least another year

**4 in 5**

Americans think there will be a second wave of COVID-19 infections in the country

**3 in 5**

Americans unlikely to take the vaccine as soon as one is available



Americans believe we should restart the economy and allow businesses to open or operate as they choose

# CONSUMER HEALTH AND SAFETY INDEX

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Ipsos conducted 2 Waves of this  
study to answer the question

# METHODOLOGY

**Step 1: Consumer Research** to analyze health and safety attributes most important to consumers and understand drivers of Return & Trust (n=2000 per wave)

**Step 2: Mystery Shopping** to evaluate in store performance of retailers (n=75-125 per brand per wave)

## MEASURE

Measure each brand's performance against consumer expectations via mystery shops.

## BENCHMARK

Benchmark each brand against industry & cross-industry standards.

## TAKE ACTION

Enable brands to take action and improve based on site-level data from the mystery shops.





# Wave 1 in May-June 2020

7 industries, 45 brands, 5400+ shops



*"Trader Joe's, Costco, Whole Foods have best coronavirus safety measures" – FOX Business*



*"Ipsos' inaugural Consumer Health & Safety Index uncovers gaps in store practices" – Supermarket News*



*"In the months to come, these safety measures will continue to influence consumer decisions" – TODAY*

# Wave 2 in July-August 2020

5 industries, 33 brands, 4700+ shops



*"Whole Foods, Panda Express, Wells Fargo tops in store safety, health measures" – Chain Store Age*

**AMERICAN BANKER**

*"the study is among the first to show how the banking industry stacks up against other retailers" – American Banker*



*"Market research firm Ipsos polled 2,000 consumers in June and found 62% of them would stop shopping at a retailer not taking health and safety seriously" - CNBC*

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# How are Consumer Attitudes Towards Health & Safety Evolving?

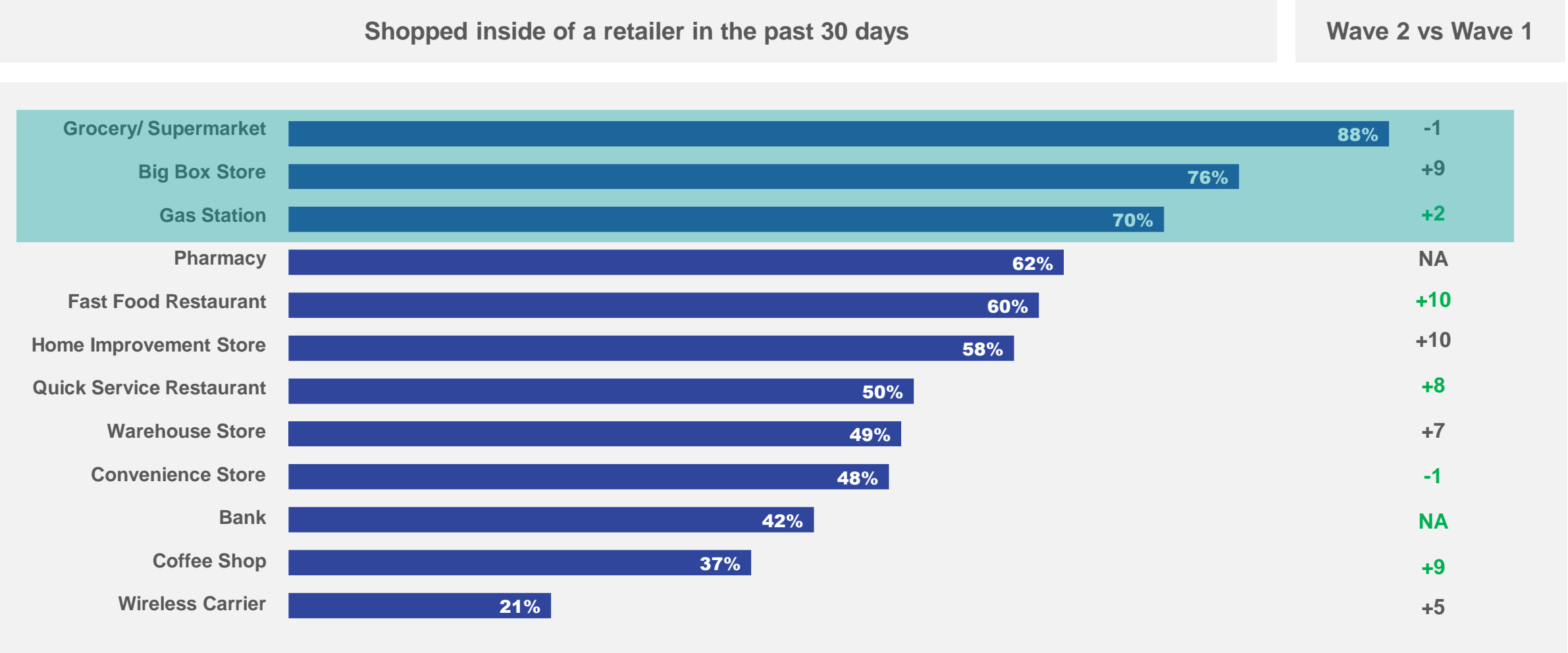
1



## Key Takeaways

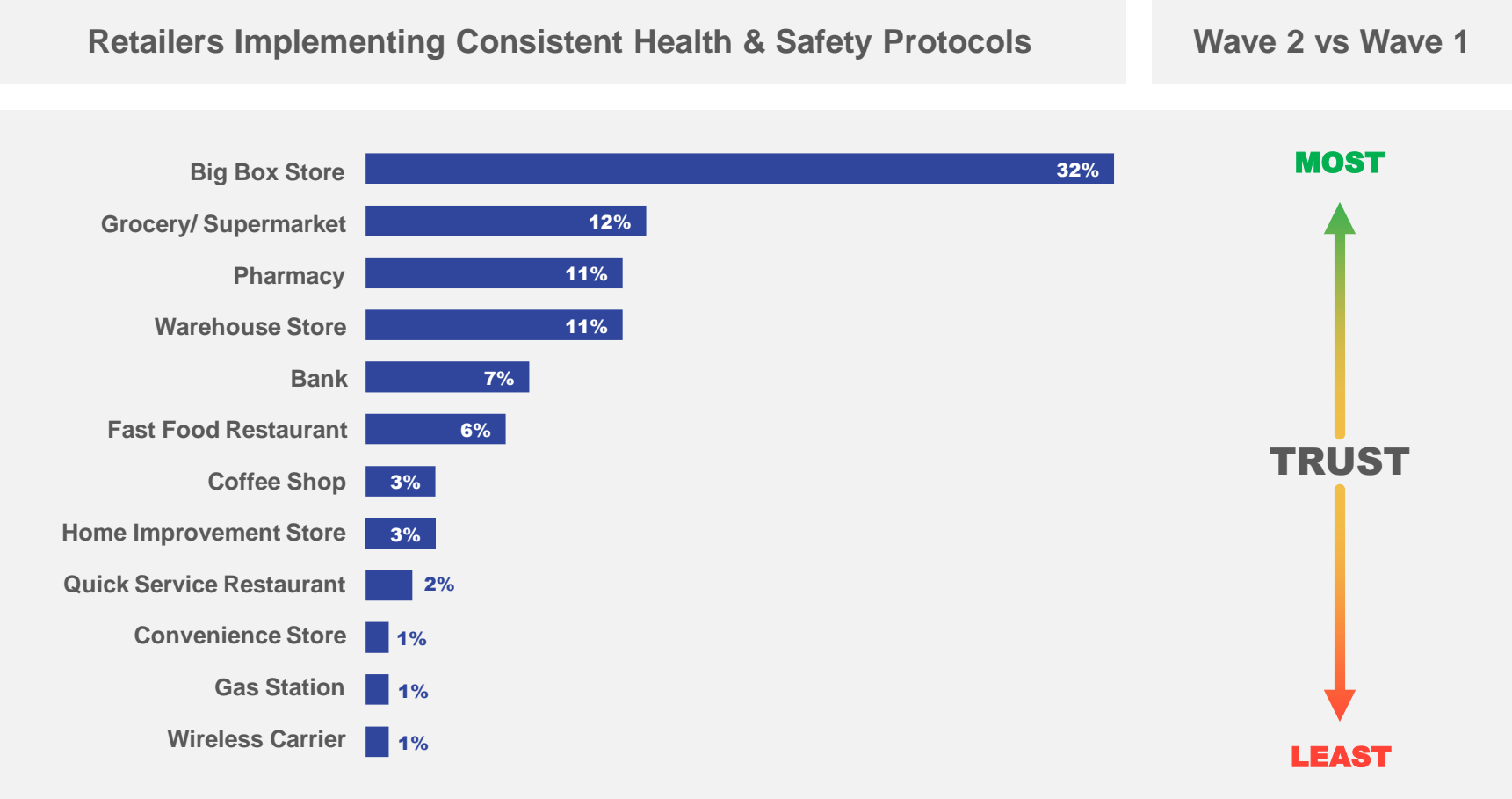
- 1** | Consumers shopping frequency is rising, but continues to be focused at essential retailers.
- 2** | Trust in retailers remains low. Health & Safety continues to be 4X times more important than customer service in store.
- 3** | There remains an opportunity to charge a premium for brands that get this right.
- 4** | There are specific measures brands can take to drive consumers to return to stores, and build long-term trust.

# Consumers shopping frequency is rising, but continues to be focused at essential retailers






# Generally, retailers who implement health and safety protocols are the more trusted by consumers



**1 in 5** consumers in Wave 2 don't trust any industries for their cleanliness and safety protocols, down from 1 in 4 in Wave 1



**27%**  
(+3pp)

Americans will pay at least 10% more for products at stores that are doing a superior job with health and safety



**61%**  
(-1pp)

Americans will stop shopping at a retailer if they knew they were not taking health and safety seriously

# We measured importance of 25 health and safety attributes

1. Clear 6-foot social distancing markers inside the store/at checkout
2. Clear 6-foot social distancing markers outside the store
3. Contactless checkout
4. Employee enforcement of social distancing outside of the store
5. Employee safety equipment appears consistent
6. Employee safety equipment is provided by their employer
7. Employees visibly wiping down high traffic areas with disinfectant
8. Hand sanitizer available at the store entrance/checkout
9. Hand sanitizer available in store restrooms
10. Managing the total number of customers entering the store in an organized fashion
11. One-way aisles
12. Performing employee health checks/taking employee temperatures prior to starting their shift
13. Plexiglass dividers at counters / checkout
14. Requiring customers to wear masks to enter stores
15. Sanitizing wipes available at the entrance to wipe down shopping carts and hand baskets
16. Signage informing customers that high traffic area have been frequently sanitized
17. Social distancing reminder at entrance of store
18. Social distancing reminders in-store
19. Store associates wearing gloves
20. Store associates wearing masks/face coverings
21. Store entrances/door that open automatically or without hand contact
22. Store offers dedicated hours for high risk customers
23. Store restrooms have motion sensors for faucets, soap, and towels
24. Store restrooms have plexiglass dividers in stalls and sink areas
25. Store restrooms with regularly updated cleaning schedules





# We conducted a driver analysis on 5 dependent variables



Likelihood To  
Return



Company Trust



Likelihood To  
Recommend



Company Effort



Willingness To  
Pay A Premium

# Some top drivers of Return in Wave 1 became top drivers of Trust in Wave 2, with new measures, including requiring customers to wear masks emerging as new drivers of Return



## Top 5 Drivers of Return in Wave 2



Employee safety equipment provided by employer



Social distancing reminders in-store



Store entrance opens automatically / without hand contact



Plexiglass dividers at counters/checkout



Requiring customers to wear masks to enter stores



## Top 5 Drivers of Trust in Wave 2



Employee safety equipment provided by employer



Hand sanitizer available at store entrance/checkout



Employees visibly wiping down high traffic areas with disinfectant



Employee safety equipment is consistent in appearance across all employees



Store restrooms with regularly updated cleaning schedules

# What are Top Performing Industries and Brands Doing to Keep Consumers Safe?





# 2



# Grocery & Big Box brands topped the Index...

..but there are opportunities to improve

	Wave 1	Wave 2
Grocery	1	1
Big Box	2	2
Pharmacy	3	n/a
Food & Beverage	4	4
Home Improvement	5	n/a
Telecom	6	n/a
Oil & Gas	7	n/a
Financial Services	n/a	3
Convenience Stores	n/a	5

	<b>Exterior of Location</b>	Grocery & Big Box topped this category on both waves
	<b>Interior of Location</b>	F&B stepped up and performed almost as well as Big Box and Grocery on this category
	<b>Location Restroom</b>	Big Box dominated this category
	<b>Sanitizer Availability</b>	Availability of hand sanitizer was a major point of failure across industries

# Next we will learn about health & safety measures taken at top performing brands in the Index


























**It's not rocket science, but the key is to be consistent and visible in implementing the top drivers of return & trust for your industry.**



# What Does The Future Of Health & Safety Look Like, And What Can Your Brand Do To Keep Up?

# 3

# According to Behavioral Science, longevity of behaviors is determined by 3 factors:



**Cue** for behavior to happen



**Barrier** for behavior



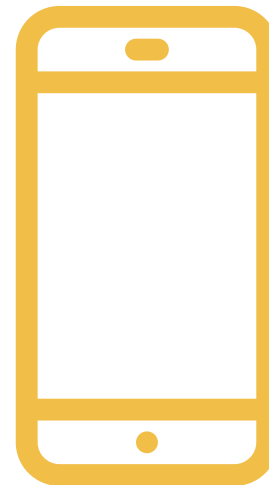
**Reward** for behavior





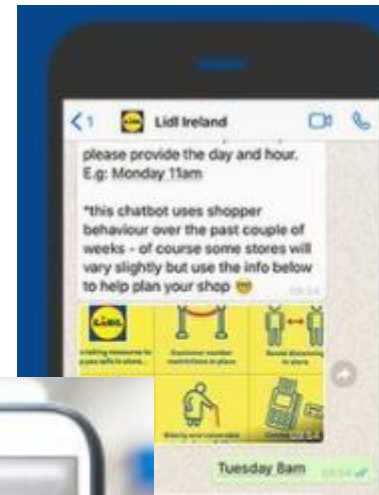
**Brands that focus on health & safety now will stand to have a competitive advantage in the near to mid term future and will win customer loyalty in the longer term.**

**Many  
brands are  
taking  
action...**





# Many brands are innovating...

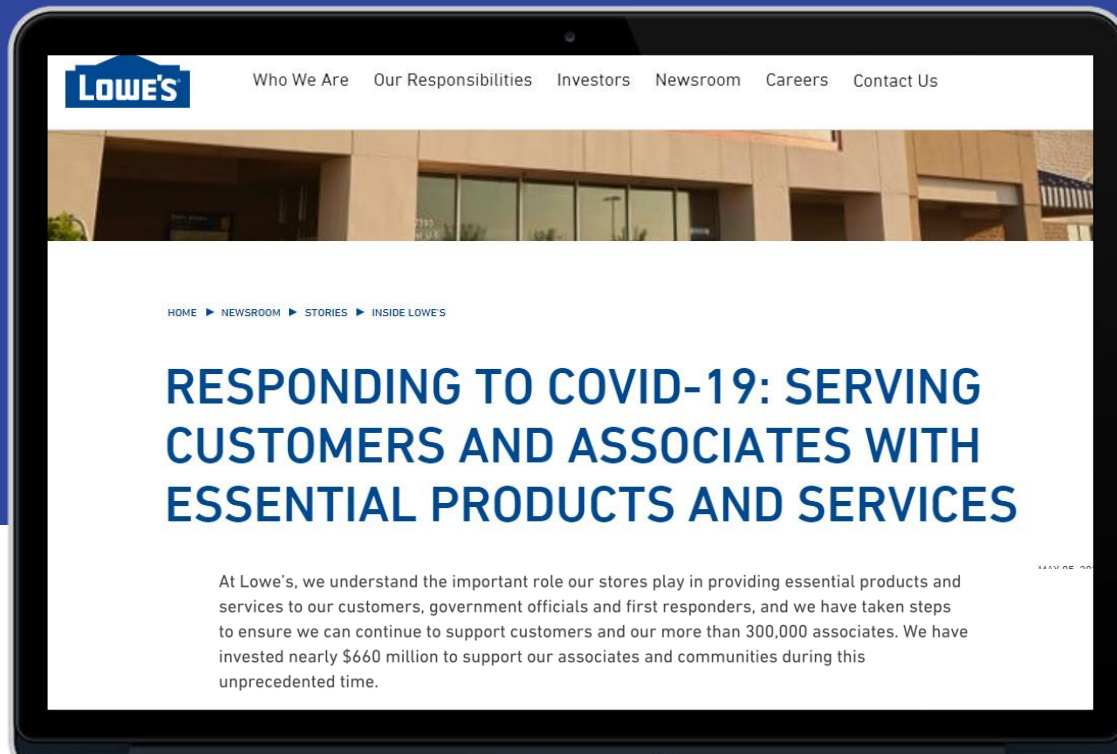


Plan ahead with our **Whatsapp Chatbot** to find the quietest time to shop...

Send us the day and time you plan to visit and it will let you know if that's a quieter, average or busier time to shop!



# Many brands are seeing the ROI...



# But there is lots more to be done

**3 in 4**

Stores visited in Wave 2 did not provide sanitizer at checkout, the #2 driver of Trust

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**3 in 5**

Stores were not observed to have employees cleaning high touch areas, the #3 driver of Trust

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**3 in 4**

Stores did not have restrooms with visible and updated cleaning schedules, the #5 driver of Trust

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**1 in 5**

Stores had no social distancing reminders present inside stores, the #2 driver of Return

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# Final Takeaways

- 1** | Health & Safety measures are here to stay
- 2** | Visible cues, consistent actions matter and drive ROI
- 3** | Brands need to do more to keep customers safe in store



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Ipsos conducted 2 Waves of this  
study to answer the question

# We have health & safety driver performance & site level data for the following brands between the two waves

 Big Box Retail	 <b>TARGET</b>	 Walmart	 sam's club	 <b>COSTCO</b> WHOLESALE	 <b>BEST BUY</b>	 <b>THE HOME DEPOT</b>	 <b>LOWE'S</b>	 <b>BJ's</b>	 <b>FAMILY DOLLAR</b>	 <b>DOLLAR GENERAL</b>		
 Convenience Store	 <b>7-ELEVEN</b>	 <b>K</b>	 <b>RaceTrac</b>	 <b>KWIK TRIP</b>	 <b>QT</b> QuikTrip	 <b>Wawa</b>						
 Financial Services	 <b>BANK OF AMERICA</b>	 <b>CHASE</b>	 <b>citi</b>	 <b>PNC</b>	 <b>usbank</b>	 <b>WELLS FARGO</b>						
 Food & Beverage	 <b>McDonald's</b>	 <b>TACO BELL</b>	 <b>CHIPOTLE</b> MEXICAN GRILL	 <b>KFC</b>	 <b>QDOBA</b> MEXICAN EATS	 <b>Panera</b> BREAD & BAKERY	 <b>Starbucks</b>	 <b>PANDA EXPRESS</b> CHINA EXPRESS	 <b>DUNKIN'</b>	 <b>SUBWAY</b>	 <b>BURGER KING</b>	 <b>Wendy's</b>
 Grocery	 <b>GIANT EAGLE</b>	 <b>ALDI</b>	 <b>WHOLE FOODS MARKET</b>	 <b>Publix</b>	 <b>Kroger</b>	 <b>TRADER JOE'S</b>	 <b>Albertsons</b>	 <b>STOP &amp; SHOP</b>	 <b>ShopRite</b>	 <b>SAFeway</b>		
 Home Improvement	 <b>LOWE'S</b>	 <b>THE HOME DEPOT</b>	 <b>MENARDS</b> Dedicated to Service & Quality	 <b>TSC</b>	 <b>ACE</b> The helpful place.	 <b>True Value</b>						
 Oil & Gas	 <b>ExxonMobil</b>	 <b>Shell</b>	 <b>Chevron</b>	 <b>PHILLIPS 66</b>	 <b>bp</b>	 <b>Valero</b>						
 Pharmacy	 <b>Walgreens</b>	 <b>RITE AID</b> PHARMACY	 <b>CVS pharmacy</b>									
 Telecom	 <b>AT&amp;T</b>	 <b>metro</b> by T-Mobile	 <b>T</b>	 <b>Sprint</b>	 <b>verizon</b>							

# METHODOLOGY

**Step 1: Consumer Research** to analyze health and safety attributes most important to consumers (n=2000 per wave)

**Step 2: Mystery Shopping** to understand how brands rank inside and outside their competitive set (n=75-125 per brand per wave)

## MEASURE

Measure each brand's performance against consumer expectations via mystery shops.

## BENCHMARK

Benchmark each brand against industry & cross-industry standards.

## TAKE ACTION

Enable brands to take action and improve based on site-level data from the mystery shops.





# Demonstrating Value

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Compare YOUR brand's performance vs industry performance on top drivers of Return for your industry. Identify top industry performer on each driver.



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- 1** Compare YOUR brand's performance vs industry performance on top drivers of Return for your industry. Identify top industry performer on each driver.
- 2** Determine your rank and relative performance in the industry on each driver of return



# Demonstrating Value

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Compare YOUR brand's performance vs industry performance on top drivers of Return for your industry. Identify top industry performer on each driver.

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Determine your rank and relative performance in the industry on each driver of return

3

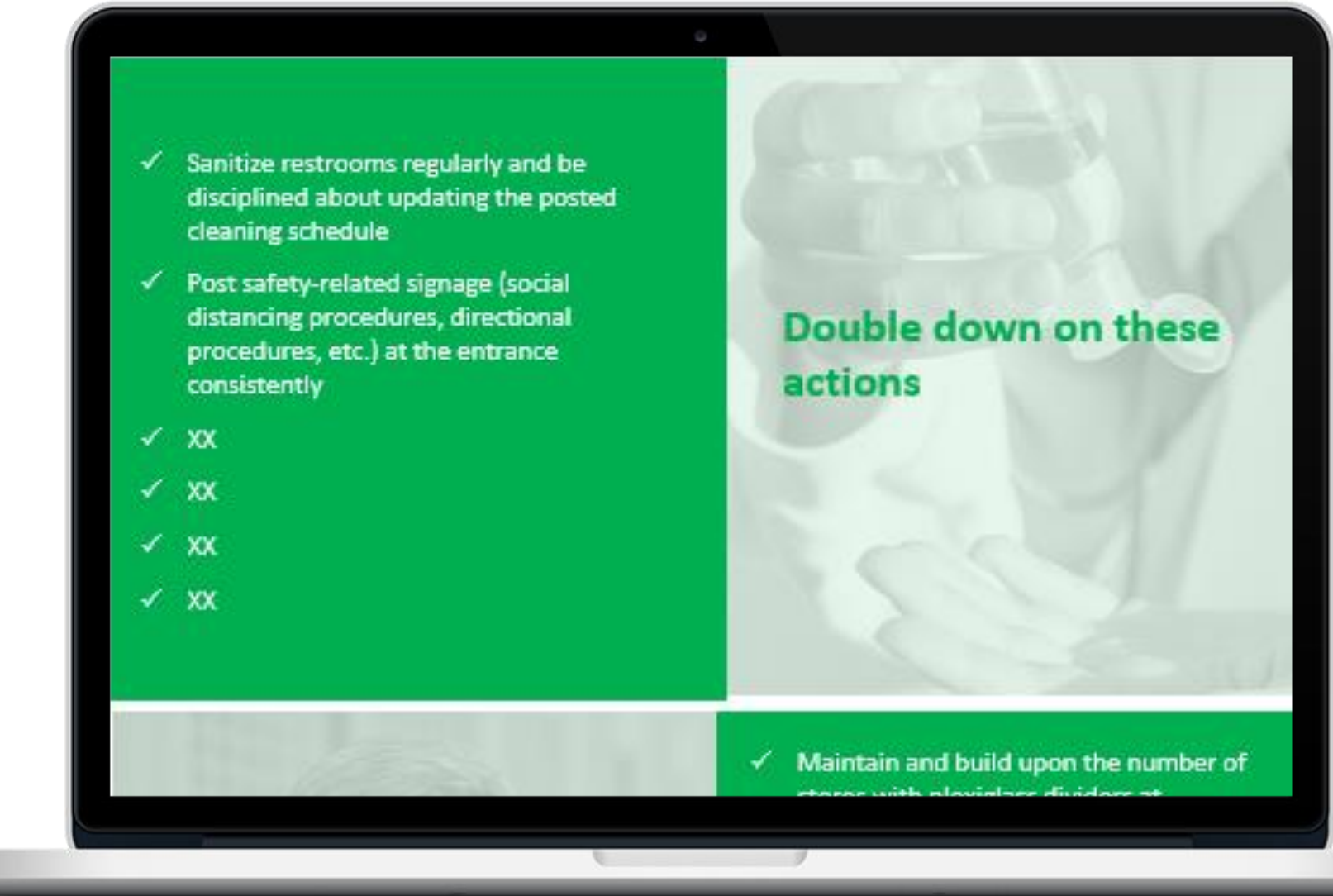
Understand your detailed performance on store exterior, interior and restroom, your rank, industry benchmark and top competitor on each aspect.

Overall	Your Industry's Score	Your Brand's score	Your Rank in Industry	Top Competitor
Overall Performance	##	##	3 (of 6)	##
Exterior	Your Industry's Score	Your Brand's score	Your Rank in Industry	Top Competitor
Overall Exterior	##	##	4	##
Signage	##	##	4	##
Barriers	##	##	2	##
Cleanliness	##	##	2	##
Distancing	##	##	5	##
Sanitizers	##	##	4	##
Wearables	##	##	3	##
Interior	Your Industry's Score	Your Brand's score	Your Rank in Industry	Top Competitor
Overall Interior	##	##	3	##
Signage	##	##	3	##
Barriers	##	##	3	##
Cleanliness	##	##	6	##
Distancing	##	##	5	##



# Demonstrating Value

- 1** Compare YOUR brand's performance vs industry performance on top drivers of Return for your industry. Identify top industry performer on each driver.
- 2** Determine your rank and relative performance in the industry on each driver of return
- 3** Understand your detailed performance on store exterior, interior and restroom, your rank, industry benchmark and top competitor on each aspect.
- 4** Tailored recommendations for your brand to differentiate vs competition on Health & Safety





## How Do I Purchase the Index?

Want to learn more about our  
*Consumer Health & Safety Index?*

Contact us:

[US\\_ChannelPerformance@Ipsos.com](mailto:US_ChannelPerformance@Ipsos.com)

# THANK YOU.





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

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# Game Changers

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**You act better when you are sure.**