

Report

**THE BUSINESSES THAT
HAVE BEST INTEGRATED
HEALTH AND SAFETY
MEASURES INTO THEIR
CUSTOMER JOURNEY
IN THE CONTEXT OF THE COVID-19
CRISIS IN QUEBEC**

DATE 04-06-2020

Leger



INTRODUCTION PRESENTED TO RESPONDENTS

During this COVID-19 crisis, stores that provide goods and services must make changes to their practices to ensure the health and safety of their customers and employees: hand washing, controlling the number of customers in the store, social distancing, measures to protect employees and customers, product safety, and so on.

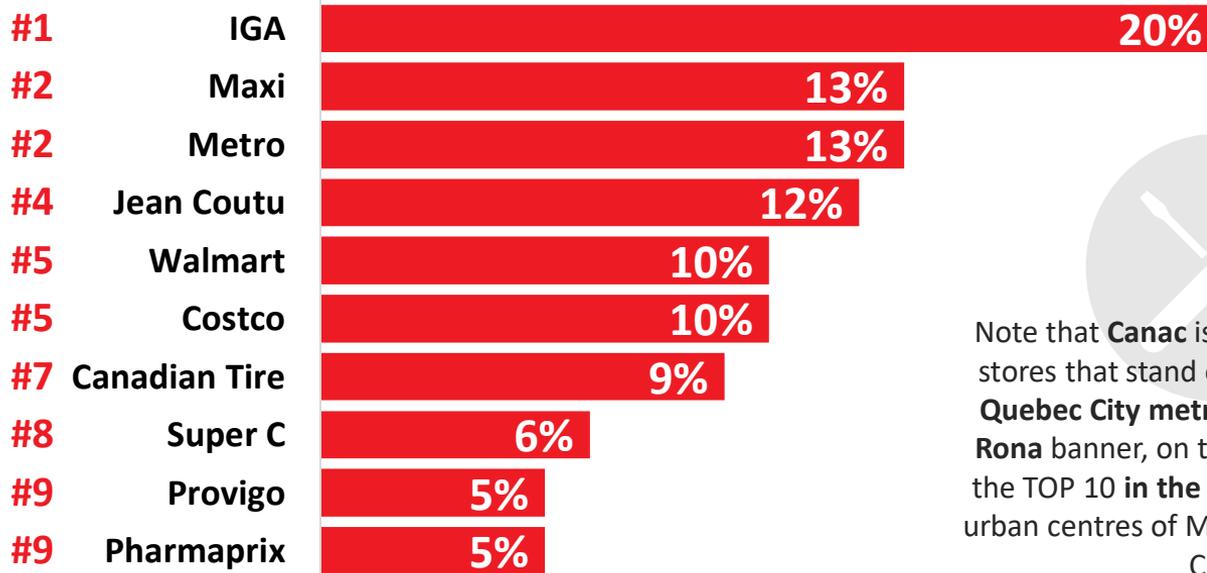
Although the objective is to ensure the health and safety of customers and employees, in some cases, these changes can have an impact on shopping ambience, enjoyment and service. Some stores have been very successful in integrating these measures to make your shopping experience pleasant, even fun.

Here are some examples:

- Providing services to customers standing in line so they can keep busy, learn something new, or entertain themselves.
- Original and playful floor signs that indicate social distancing or the customer traffic flow in the aisles.
- Digital wait lines to avoid having to stand in line physically: making a virtual appointment, app to find out about wait times, etc.
- Virtual fitting room or mirror for contactless shopping to try on clothing, glasses, shoes, etc.
- Turning the store into a showroom with service, but with online purchases only.
- Reinvented and fun sales counter, but the sales area is closed to the public.
- Creating small areas, bubbles or cubicles with plexiglass to provide social distancing and security in a creative manner.
- etc.

TOP 10 BUSINESSES IN QUEBEC THAT HAVE BEST INTEGRATED THE MEASURES INTO THEIR CUSTOMER JOURNEY

TOP 10 PROVINCE OF QUEBEC

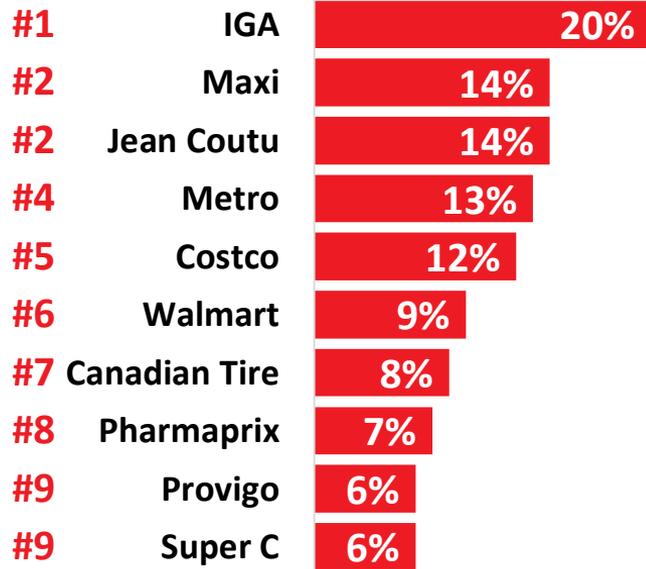


Note that **Canac** is part of the TOP 10 stores that stand out the most in the **Quebec City metropolitan area**. The **Rona** banner, on the other hand, is in the TOP 10 **in the regions** outside the urban centres of Montreal and Quebec City.

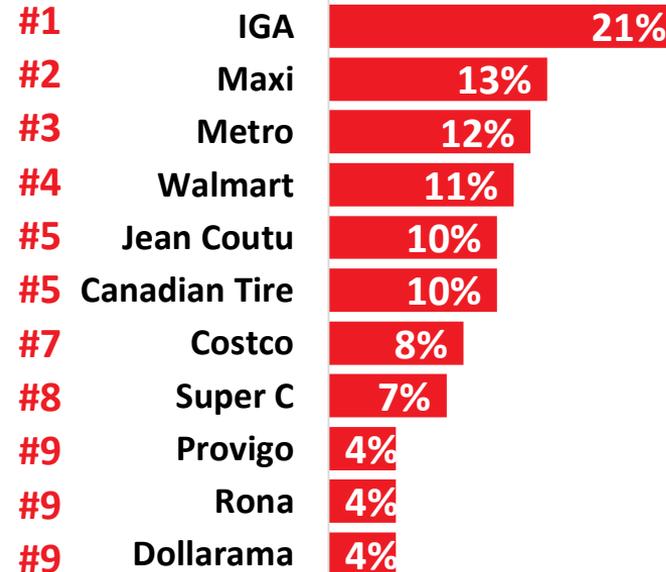
Q1. Based on your experience since the beginning of the crisis, in your opinion, which businesses succeeded in standing out to make your shopping experience more pleasant or fun through how they applied health and safety measures in their stores?

TOP 10 BUSINESSES THAT HAVE BEST INTEGRATED THE MEASURES INTO THEIR CUSTOMER JOURNEY

TOP 10 MONTREAL CMA



TOP 10 OTHER REGIONS



Q1. Based on your experience since the beginning of the crisis, in your opinion, which businesses succeeded in standing out to make your shopping experience more pleasant or fun through how they applied health and safety measures in their stores?

ALL BUSINESSES THAT HAVE BEST INTEGRATED THE MEASURES INTO THEIR CUSTOMER JOURNEY IN QUEBEC

BUSINESSES ≥ 1% OF RESPONSES	TOTAL	BUSINESSES ≥ 1% OF RESPONSES	TOTAL
IGA	20%	Dollarama	3%
Maxi	13%	Brunet	2%
Metro	13%	Tigre Géant	2%
Jean Coutu	12%	Canac	2%
Costco	10%	Adonis	1%
Walmart	10%	L'Intermarché	1%
Canadian Tire	9%	Familiprix	1%
Super C	6%	Home Depot	1%
Provigo	5%	Home Hardware	1%
Pharmaprix	5%	Simons	1%
Uniprix	3%	Mondou	1%
SAQ	3%	Tim Hortons	1%
Rona	3%	McDonald's	1%

In total, **53%** of Quebecers feel that at least one business has stood out during the crisis in terms of customer experience.

Q1. Based on your experience since the beginning of the crisis, in your opinion, which businesses succeeded in standing out to make your shopping experience more pleasant or fun through how they applied health and safety measures in their stores?

THE STAGE IN THE CUSTOMER JOURNEY WHERE STORES HAVE STOOD OUT THE MOST IN THE EYES OF CONSUMERS



Proportion of businesses that stand out at different stages of the customer journey.

Since a business can stand out at different stages of the customer journey, it is normal that the total %s are greater than 100%.

Q2. How did they stand out?

OPEN QUESTION – SEVERAL MENTIONS POSSIBLE FOR EACH OF THE STORES MENTIONED AT Q1 / Base: 1,498 business evaluations

THE STAGE IN THE CUSTOMER JOURNEY WHERE STORES HAVE STOOD OUT THE MOST IN THE EYES OF CONSUMERS



ENTRY:
REPRESENTS
16% OF
MENTIONS

DETAILED MENTIONS	TOTAL
Limitating / Controlling the number of people in the business	10%
Lineup / waiting zone	4%
Security of business entrance / entrance security guard	2%
Ease of access / quick access	1%

In general, **grocery stores** stand out in terms of the measures taken at the store entrances, particularly in terms of **controlling the number of people** allowed inside and the presence of **security measures**.

Q2. How did they stand out?

OPEN QUESTION – SEVERAL MENTIONS POSSIBLE FOR EACH OF THE STORES MENTIONED AT Q1 / Base: 1,498 business evaluations

THE STAGE IN THE CUSTOMER JOURNEY WHERE STORES HAVE STOOD OUT THE MOST IN THE EYES OF CONSUMERS



WELCOME:
REPRESENTS
30% OF
MENTIONS

DETAILED MENTIONS	TOTAL
Hand washing / addition of washbasin at the entrance / hand sanitizing gel	24%
Disinfection / washing of baskets / carts	7%
Wearing a mask / mask distribution	3%
Asking customers questions at the entrance / questionnaire	3%
Employee at the entrance to welcome us / more staff to guide us	3%

If several types of businesses stand out from the moment you enter the store, it is not all for the same reasons. **In pharmacies, consumers are more likely to have noticed the questions** asked to customers about the state of their health as soon as they arrive at the store. On the other hand, **Costco** stands out in terms of the **compulsory wearing of masks** and **Maxi** especially for **cleaning shopping baskets**.

Q2. How did they stand out?

OPEN QUESTION – SEVERAL MENTIONS POSSIBLE FOR EACH OF THE STORES MENTIONED AT Q1 / Base: 1,498 business evaluations

THE STAGE IN THE CUSTOMER JOURNEY WHERE STORES HAVE STOOD OUT THE MOST IN THE EYES OF CONSUMERS



SERVICE AREA: REPRESENTS 60% OF MENTIONS

DETAILED MENTIONS	TOTAL
Appropriate preventive/protective measures / safety measures / instructions in the store	16%
Signs/arrows/lines on the floor/traffic direction on the ground	13%
Compliance with distance rules (2 metre distance) / in-store distance marking	11%
Compliance with government recommendations/measures in the store	5%
Cleanliness of the premises / regular disinfection of equipment / cleaning	3%
Good measures / excellent overall	5%
Good organization	4%
Good hygiene / sanitary measures	2%
One-way aisle / one-way arrows	2%
Efficient service/good functioning	2%
Good layout of the premises / appropriate facilities	2%
Measures not too restrictive/constraining / freedom of shopping	2%
Good product availability / good product variety	1%
Many discounts/promotions	1%

Discount banners, such as Super C, Maxi and Walmart, particularly stand out for their in-store signage efforts regarding aisle traffic. Many customers also praise businesses such as the **SAQ** and **Canac** for their **preventive measures in general**, which inspire confidence and security.

Q2. How did they stand out?

OPEN QUESTION – SEVERAL MENTIONS POSSIBLE FOR EACH OF THE STORES MENTIONED AT Q1 / Base: 1,498 business evaluations

THE STAGE IN THE CUSTOMER JOURNEY WHERE STORES HAVE STOOD OUT THE MOST IN THE EYES OF CONSUMERS



**CUSTOMER SERVICE:
REPRESENTS
9% OF
MENTIONS**

DETAILED MENTIONS	TOTAL
Good customer service / good reception / good service	8%
Personnel are well protected / wear protective equipment	1%

In periods of crisis, the quality of customer service remains an important way to stand out from the competition. While essential businesses such as grocery stores and pharmacies stand out mainly for their health and safety measures, the **few service and retail businesses spontaneously mentioned** (such as financial institutions, clothing stores like Simons or sports and outdoor stores) **stand out because of the quality of their customer service.**

Q2. How did they stand out?

OPEN QUESTION – SEVERAL MENTIONS POSSIBLE FOR EACH OF THE STORES MENTIONED AT Q1 / Base: 1,498 business evaluations

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PAYMENT:
REPRESENTS
8% OF
MENTIONS

DETAILED MENTIONS	TOTAL
Cashier behind a protective screen / Plexiglas/protective screen	5%
Fast service / no line / more open checkouts	4%

The results show that the **SAQ has done very well at the payment stage and the service offered at the checkout.** In fact, 23% of the customers for whom the SAQ stood out mentioned service at the checkout, especially in relation to the efficiency and speed of the process.

Q2. How did they stand out?

OPEN QUESTION – SEVERAL MENTIONS POSSIBLE FOR EACH OF THE STORES MENTIONED AT Q1 / Base: 1,498 business evaluations

THE STAGE IN THE CUSTOMER JOURNEY WHERE STORES HAVE STOOD OUT THE MOST IN THE EYES OF CONSUMERS



**DELIVERY
AND PICK UP:
REPRESENTS
7% OF
MENTIONS**

DETAILED MENTIONS	TOTAL
Online ordering service / mobile application / order by phone	4%
Delivery service / free delivery	2%
Drive-through service	1%
Service provided outside (outside counter, outside pick-up service, etc.)	1%

The delivery and pick up of products made certain businesses stand out in the eyes of customers. For example, the **drive-through service launched by Chocolats Favoris** in the midst of the pandemic was highlighted positively by customers, **as was Canadian Tire's** well-established drive-through service. Businesses such as **Amazon, Simons and McDonald's** stand out for their **online ordering service**.

Q2. How did they stand out?

OPEN QUESTION – SEVERAL MENTIONS POSSIBLE FOR EACH OF THE STORES MENTIONED AT Q1 / Base: 1,498 business evaluations

OTHER TRENDS OBSERVED

ESSENTIAL BUSINESSES STAND OUT ESPECIALLY IN THE AREA OF HEALTH AND SAFETY

At this stage of measurement, it is not surprising that the **businesses that stand out the most in the eyes of Quebecers are those offering essential services, and therefore those that have remained open to the public during the pandemic**: grocery stores, pharmacies, renovation centres, big-box stores, etc. These businesses stand out above all for their rigour in applying the **health and safety measures** put in place to protect employees and visitors. With deconfinement taking its course, it will be interesting to follow this survey over time to see which other retail businesses manage to stand out, and at what stage of the customer journey. So far, **clothing and home furnishings stores** such as Simons, for example, seem to be doing well in terms of the **quality of customer service** and the delivery and pick-up process.

INNOVATION, NOT JUST FOR THE BIGGEST!

The survey also highlights **several examples of small businesses that have been able to adjust quickly and make their mark in the minds of their customers**. One might think that smaller organizations may have more flexibility to propose innovative and fun measures. Here are some examples of selected verbatim comments:

Club Piscine

“The lines are very efficient, one line per service! In addition, we received personalized advice from the staff. Very reassuring.”

Café Les Impertinentes

“Nice humorous sign at the entrance to explain the measures and to disinfect your hands. Inside, a nice barrier made with tables and flowers.”

Ferme Guyon

“As a reminder to respect the 2 metre distance, they say to keep 5 chickens apart!”

La pomme en cage

“There are plenty of flags and colourful posters to mark safe pathways.”

Lavadog

“They set up the waiting room in a very creative and safe way for the animals and the owners.”

APPENDIX—
METHODOLOGICAL APPROACH

METHODOLOGICAL APPROACH



METHOD

A **web survey** was conducted among Quebecers.



RESPONDENTS

Representative sample of **1,006 English-speaking and French-speaking Quebecers aged 18 and over.**



WHEN?

The data were collected from **May 30 – May 31, 2020.**



WEIGHTING

The results were weighted by **age, gender, region, education, and presence of children under the age of 18 in the household** to ensure a representative sample of the Quebec population.

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