



Safety and cleanliness—make it or break it.

Hard to build trust, easy to lose it all

Up until now, most customers and employees in consumer industries have assumed a basic level of safety and cleanliness throughout an experience. However since COVID-19, safety and cleanliness is no longer an assumptive variable in the majority of customer and employee experiences; trust has been broken. So, what now? The variables that make up the baseline are being redefined—by customers and employees, not companies. Now, companies must respond proactively to be able to meet the new baseline, rebuild that trust, and restore engagement and confidence in the brand. **Safety is only a differentiator once that baseline is met.** As specialists in travel and hospitality, we know safety has always been paramount for customers since we've been studying and observing it for years! Read more about [dining](#)¹ and [hotel](#)² guests' needs for safety throughout the years.

Why is meeting that baseline so hard? Why is there no upside to getting safety right, but a massive downside to getting it slightly wrong? One of the biggest challenges companies now face is the dynamic nature of expectations and how quickly the expectations can change. Everyone, regardless of what segment a customer

or employee falls into, has changed safety expectations. **People's view on safety is binary—it either leads to increased trust or no trust at all.** Safety and cleanliness have gone from assumed items to single points of failure. If a company fulfills the safety and cleanliness requirements, it is one step closer to a chance of re-engaging with a customer and employee. If customers and employees don't think their needs have been fulfilled, they could easily select another brand. Since people mostly trust themselves right now, proving that a company cares for its customers and employees is the first step in re-engaging and continuing to build trust. After all, fewer than half of consumers trust others to adhere to social distancing.³ **Safety is the new currency to re-establish trust.**

4%

Businesses are among the least trusted, with only 4 percent of respondents citing their employer, local businesses, or major businesses as the source they trust most

Three elements to recover and thrive

As we researched and analyzed consumer industries, three key themes emerged that companies should prioritize to rebuild the trust and begin to enhance the overall experience:

1. Safety essentials
2. Dialed-up control
3. Heightened transparency

Safety essentials

We tested over 40 possible interventions across the customer and employee journey.

What rose to the top? The 'basics', such as wearing masks, providing hand sanitizer, and cleaning surfaces regularly.

FOR CUSTOMERS:

- Surfaces cleaned after each interaction (62%)
- Extra cleaning precautions & preventions taken (59%)
- Regular spraying/fogging to disinfect shared furniture spaces (57%)

FOR EMPLOYEES:

- Regular cleaning of equipment and shared space by a cleaning service (64%)
- Regular spraying/fogging to disinfect shared furniture spaces (60%)

Source: Deloitte Safety & Cleanliness Survey, Deloitte Consulting LLP, 2020

These essentials make up the new baseline for companies, with differentiation coming through exceptional execution and individual control. But, if this is done incorrectly, it has a clear negative impact on the brand and its re-entry into the market. As the messaging and communication of safety essentials represents a brand's dedication to safety and cleanliness, and is a decision point for customers and employees to re-engage, companies need to demonstrate they are doing it right.

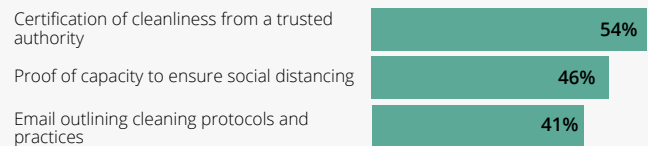
The importance of getting this right early, at an industry level, cannot be overlooked. Companies within a sector have an opportunity to work together to create a consistent baseline that is repeatable and applicable in any place. This collaboration might be a business imperative in sectors that are disproportionately affected during safety and cleanliness disruptions, such as restaurants, airlines, retail establishments, and hotels. Working together can help reduce anxiety for customers and employees, ease re-entry, and alleviate potential regulatory issues.

Where have we seen this before? The automotive industry. Manufacturing companies are required to follow federal regulations, as well as state and local jurisdictions. This means they are subject to federal safety regulations and different state and local regulations, which can vary drastically. Since manufacturing companies did not work together to create their own standards, they now have added complexities of many governing bodies.⁴

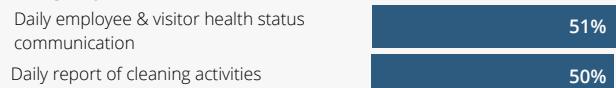
How can companies engender a sense of safety and cleanliness amongst their customers and employees? Companies need to show a consistent effort and demonstration of cleaning applications. This is a clear sign to customers and employees that a company is upholding their promise of health and well-being as a top priority. However, these actions should not live in a silo as they can accelerate new transformations in the business. For example, since customers and employees want to have common surfaces cleaned regularly, this could help accelerate a low/no touch experience.

When **offsite**, both customers and employees value relevant communication as a safety essential

Customer:

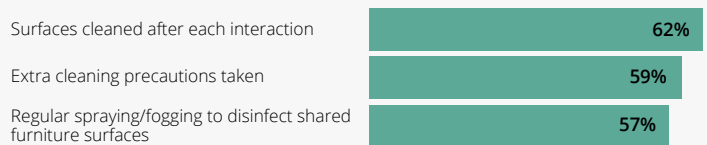


Employee:

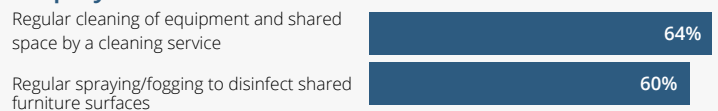


When **onsite**, both customers and employees value visible cleaning measures as a safety essential

Customer:



Employee:



Source: Deloitte Safety & Cleanliness Survey, Deloitte Consulting LLP, 2020

Although the safety requirements may seem obvious, not being able to deliver can have big ramifications on bringing customers and employees back for multiple experiences. Without starting with the basics, nothing else matters.

Our recommendation

Work collectively as an industry to identify key customer and employee requirements, such as wearing face masks, and act on those requirements to establish the new baseline.

60%

of customers and employees find consistent presence of visible cleaning efforts to be the most important aspect while engaging in the experience

Source: Deloitte Safety & Cleanliness Survey, Deloitte Consulting LLP, 2020

Dialed-up control

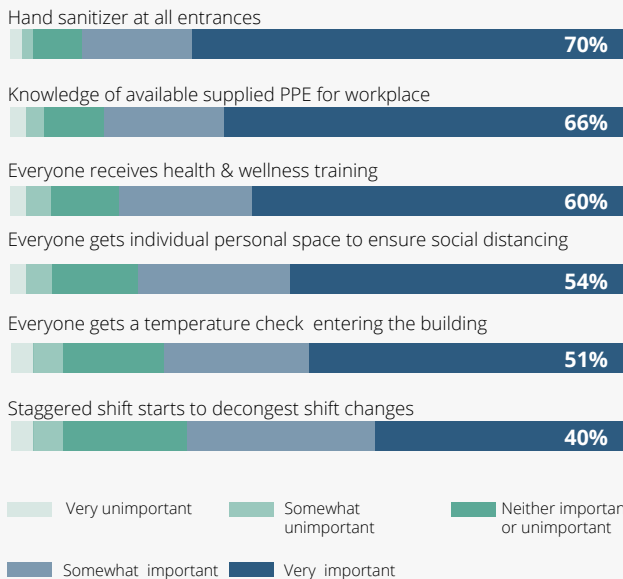
Customers and employees want choices to help them take control of their experiences. Knowing they have control helps alleviate anxiety, especially in places where there is escalated uncertainty, such as entry into the physical space for employees.⁵ Although customers and employees want to make their own choices, they expect companies to provide the necessary tools.⁵

84%

of customers surveyed found personal control of cleaning to be somewhat or very important upon entry and engagement in an experience

44%

of customers prefer being provided their own cleaning supplies upon check-in and forego daily housekeeping services



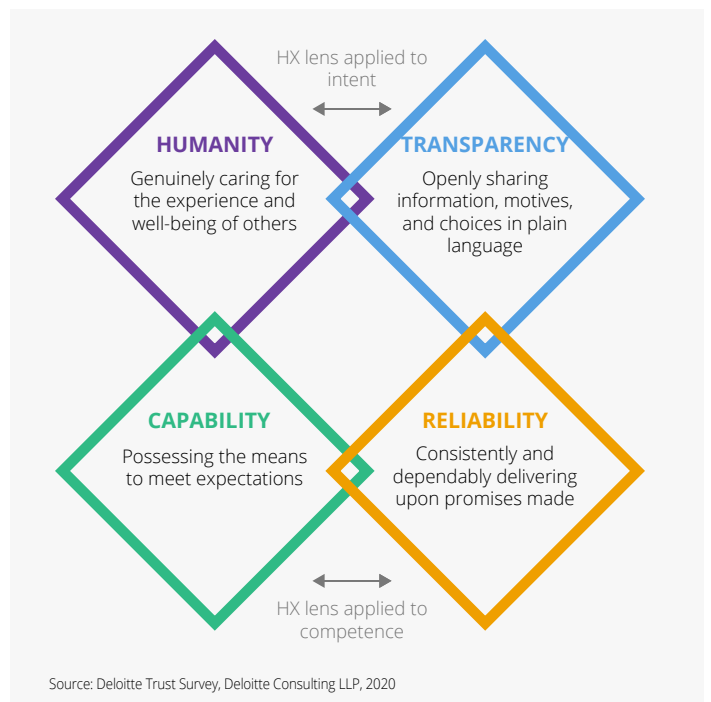
Source: Deloitte Safety & Cleanliness Survey, Deloitte Consulting LLP, 2020

address the options a family might want versus a senior couple or training frontline staff on different customer groups and the various safety and cleanliness options they might offer. This shows a level of understanding and empathy which helps build trust and confidence.

Is there a greater opportunity here? Yes, companies have an opportunity to extend and amplify their impact by aligning their safety and cleanliness efforts with trusted brands—they do not need to do this alone. Seeing products or services from a trusted brand can help reduce anxiety and furthers the idea that safety is a top priority for a company. Customers and employees are clear that they want control and agency over their experiences but need the help and support of companies to make this feasible.

Our recommendation

Work within industry, both competitors and non-competitors, to establish points along the journey where customers and employees should have agency over their own journey. Provide them with the tools to enable those choices, such as personal sanitization kits, which can benefit the industry and does not create competition in areas that are tablestakes. Also, ensure points that customers and employees have control are not only in private accommodations but also in public environments as this may be more important in various stages in their journey.



However, this doesn't mean companies can take a one solution fits all approach. Companies need to show they understand needs of different groups and individuals and provide personalized solutions to continually bring a human element. What might this look like? Using customer data to proactively

Heightened transparency

A key tenet of regaining and building trust is transparency of information. What does transparency mean for safety and cleanliness? It is using the right activities, tangible vs. intangible, seen vs. unseen, at the right time. Many of the activities that customers and employees experience throughout their journey have varying degrees of transparency and can be big influences in making decisions. The good news? Many of these influencing activities are the same for customers and employees. That said, companies need to be pragmatic about when and how they use these influences. For example, when customers see employees onsite, they should see proactive cleaning measures. Customers perceive this employee behavior to be an indicator of how a company measures the importance of safety and cleanliness and can sway their choice to use one brand over another. What's the biggest challenge? Providing transparency when customers and employees are offsite.

82% of customers surveyed feel that companies willing to take extra steps to ensure the safety and well-being of their employees "must be in place" or "would make more likely" to visit a business

85% or more of customers surveyed find visible mechanisms to be most or somewhat important to them

83% or more of employees surveyed find visible mechanisms to be most or somewhat important to them

Source: Deloitte HX in Uncertainty Survey, Deloitte Consulting LLP, 2020

Source: Deloitte Safety & Cleanliness Survey, Deloitte Consulting LLP, 2020

Prior to COVID-19, this was less important. Now, everyone wants to know the specific safety measures taken to physical environments before they agree to an experience as well as what measures are taken and communicated to them after the experience. Ensuring quality content is shared, such as daily communication of health status of employees and communication around any health-related incidents after a customer's experience, helps close out an experience knowing that safety is top of mind all the way through.⁵

This level of transparency and openness can continue to build trust, even at the tail end of the experience. Increased transparency on what, how, and when safety and health precautions are taken must be incorporated throughout the journey.

What employees look for in communication

| | All employees | Customer-facing | Near customers | Away from customers | Corporate office |
|---|---------------|-----------------|----------------|---------------------|------------------|
| Frequency (e.g. daily) | 24% | 27% | 20% | 18% | 19% |
| Content (e.g. cleaning procedures) | 18% | 18% | 21% | 18% | 13% |
| Empathy (e.g. individual outreach) | 16% | 15% | 16% | 19% | 19% |
| Quality (e.g. depth of information) | 11% | 11% | 13% | 15% | 12% |
| Transparency (e.g. clear communication) | 16% | 14% | 17% | 11% | 25% |

Source: Deloitte Safety & Cleanliness Survey, Deloitte Consulting LLP, 2020

Our recommendation

Use tangible and intangible actions to influence the experiences of customers and employees, such as clear messaging and signage in physical spaces.

Activating the change

What does this mean going forward? Especially now, companies need to challenge orthodoxies and begin to make the necessary safety and cleanliness changes while positioning for broader strategic transformation. What are some potential changes?

Work with competitors to become allies. Competitors can work together to set the new baseline and further the industry as a whole. Since differentiation doesn't come with getting the basics right, why not partner to help make it easier? Then, focus attention on increasing the experience from the new baseline.

Track the level of agency desired. Safety and cleanliness have historically been taken for granted. In this "new normal", there's an opportunity for companies to build analytics around safety and cleanliness and use that to drive key business decisions. This will help organizations understand, is this a "new normal" or "normal for now"? What types of customers take advantage of certain cleaning supplies? What choices do customers and employees opt into? Identifying and answering some key questions can be an accelerator for smart investment.

Empower employees to represent your brand. Employees are the face of your brand and can have a significant impact on a customer's experience (and other employees!). They are often more trusted than official sources and send clear signals and messages to their networks—friends, family, customers—that the environment is safe. Showing employees they are valued and

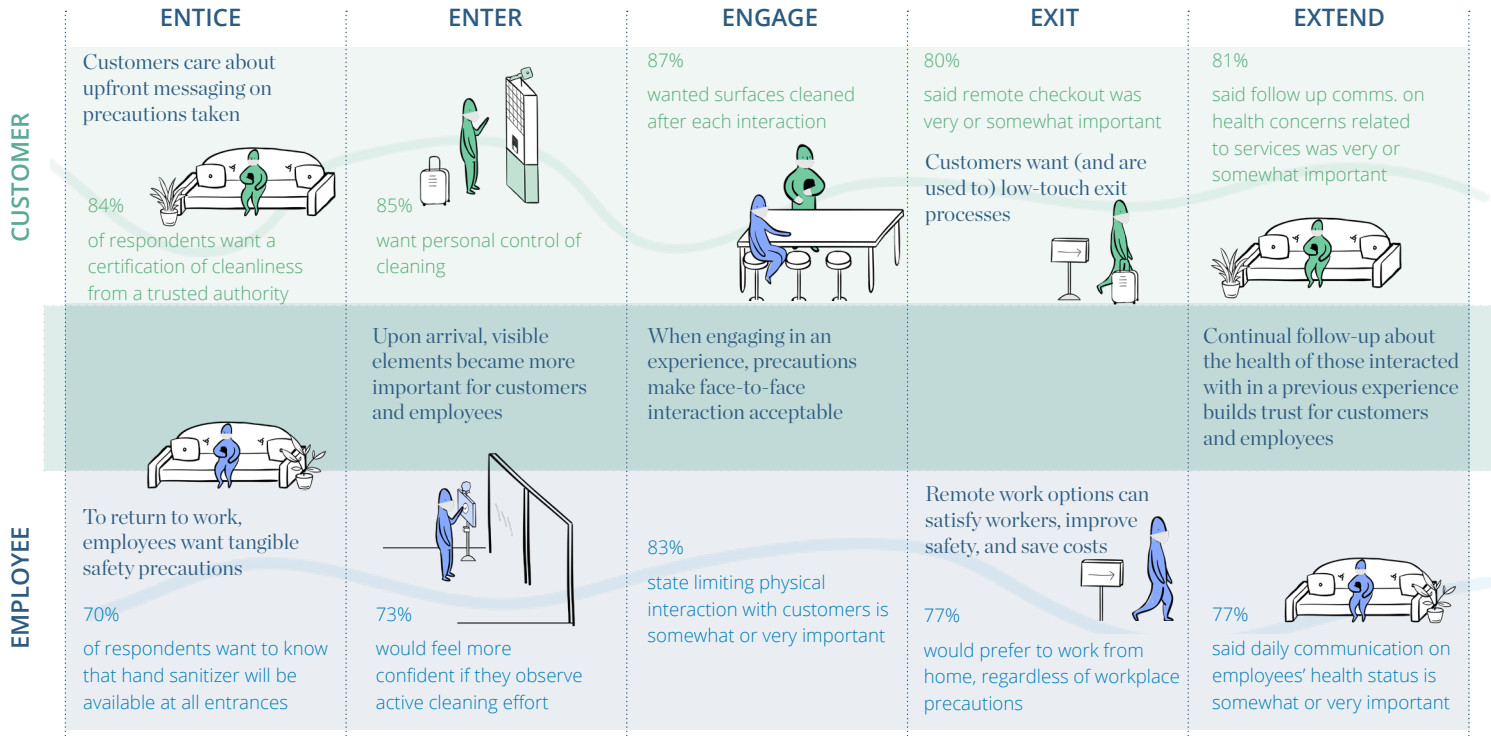
respected is important so they feel proud of the brand. This includes understanding their needs, training them to remain safe, and being flexible when it comes to shifts and new potential roles.

Invest in understanding. Recent events have reminded us all how unpredictable and uncertain our experiences can be. Safety has always been important, but it's newly top of mind and in question. We expect that as companies evolve their practices

and as the health of our global community shifts, beliefs and expectations around safety will continue to shift as well. It will be critical for companies to aggressively understand, continually reassess, and act on safety beliefs.

With guidance and some tailored approaches, companies can continue to evolve the experiences, and recover and thrive in the ever changing "new normal".

Reimagined journey for future of safety and cleanliness



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Endnotes

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4. U.S. Government Regulation of Specialty Auto Parts, SEMA, https://www.sema.org/files/attachments/government-regulation-specialty-auto-parts.pdf?_
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