

COVID-19 perspective Hungary

Do you feel safe out and about?

MSPA Survey • 16th November 2020



Background

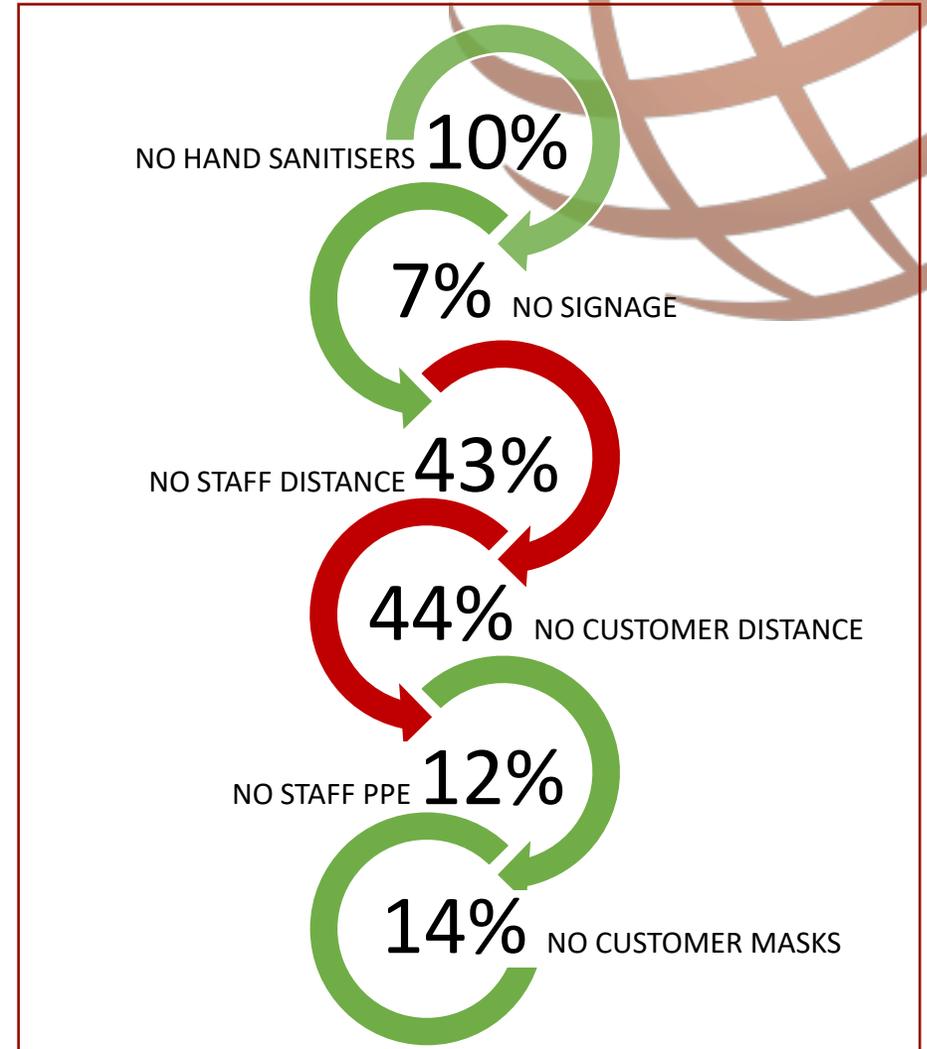


- The MSPA Europe Africa conducted surveys amongst members of the general public about their experiences when out shopping, dining and going about their daily lives from 25th October to 9th November 2020.
- 103 interactions were assessed in October/November, based on the principles of COVID-19 prevention of transmission:-
 - Sanitisation
 - Signage
 - Social distancing
 - PPE for Staff
 - Mask wearing by customers
- Respondents were asked about their feeling of safety to complete the transaction and likelihood to recommend the place they visited
- The findings show mixed levels of best practice, with a potential impact on national health and a real impact on consumer confidence and advocacy
- We need to keep minding those gaps!

Mind the Gaps... what are we missing in the Hungary?

The answer is mixed, with a important GAPS to observe...

- Was **SANITISATION** equipment available to you? (gels, sprays, dispensers) – **9 out of 10 times**
- Was clear **SIGNAGE** regarding social distancing on display? – **over 9 out of 10 times**
- Was **SOCIAL DISTANCING** followed by the **STAFF**? – **less than 6 out of 10 times**
- Was **SOCIAL DISTANCING** followed by the **CUSTOMERS**? – **less than 6 out of 10 times**
- Did staff have **PERSONAL PROTECTION OR SCREENS** to prevent infection? – **about 9 out of 10 times**
- Did all customers wear **MASKS** to prevent infection? – **8.6 out of 10 times**



0 to 17% (up to 1 in 6)
18 to 25% (up to 1 in 4)
26% over

Mind the Gaps... what does this mean?

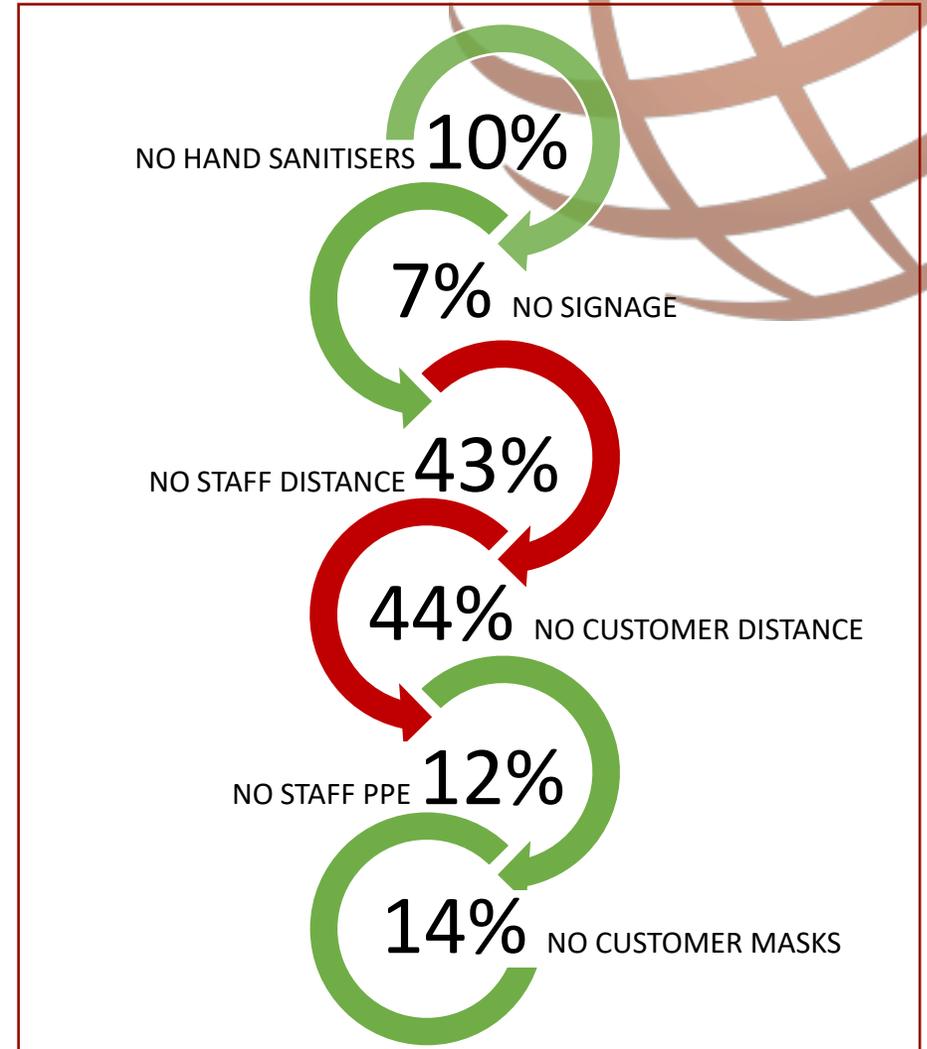
With gaps in our collective ability to observe the hygiene factors required, there will be an inevitable impact on our health and our economy:-

8% of customers said they actually felt unsafe to complete their transaction

Nonetheless that means under 1 in 20 customer revenue is potentially lost...

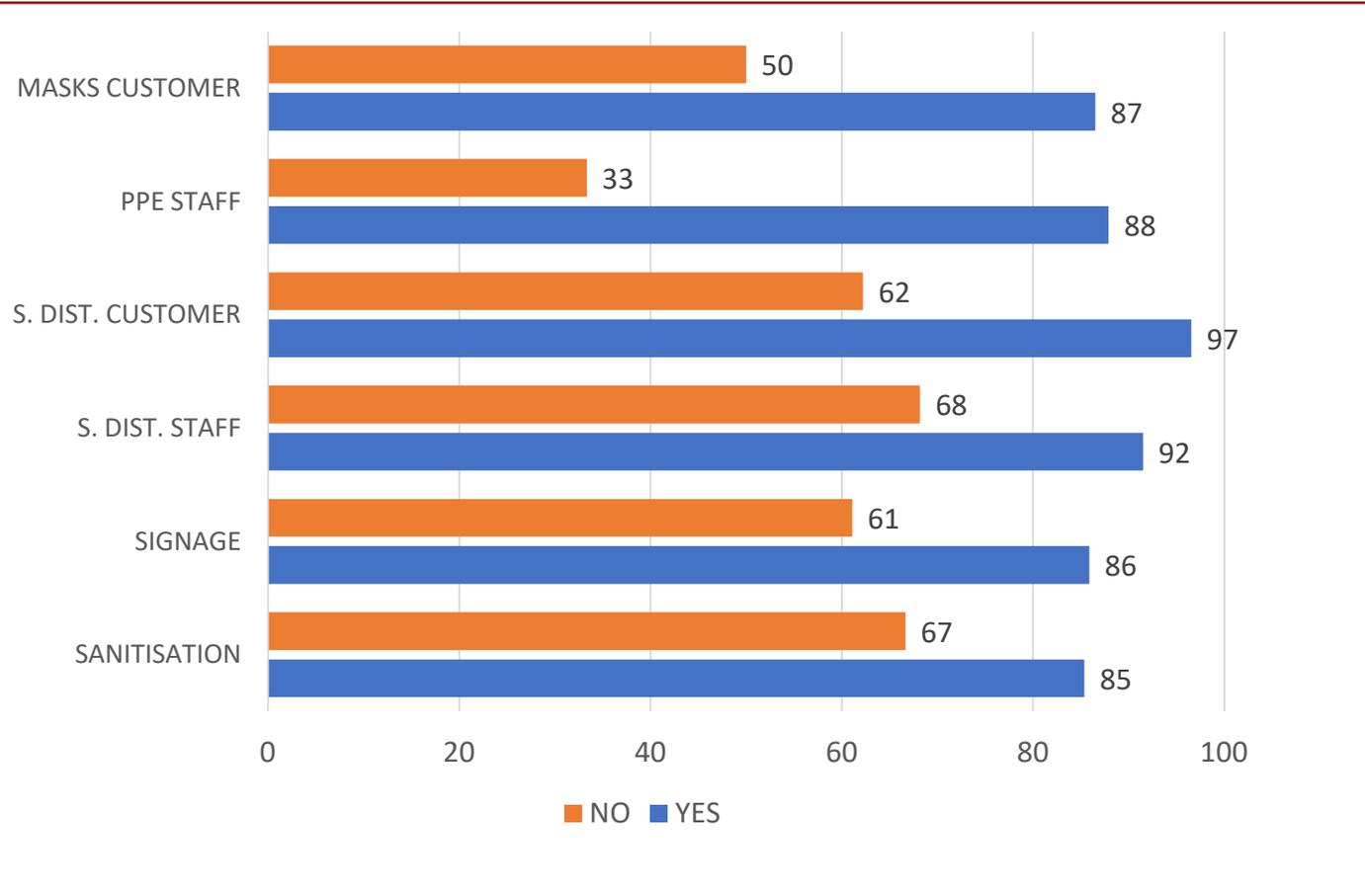
The recommendation rate is 8.3 out of 10!

On the surface this seems very promising, but in reality these gaps have a detrimental effect on safety, confidence and recommendation. So have businesses made a good enough impression as we deal with a continued virus threat?



What is most important in terms of safety perception?

How do each of the 6 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 all measures that when properly fulfilled will increase a sense of safety.

The gaps show all elements are important but PPE and Mask wearing have the most impact:-

Sanitisation: 18

Signage: 25

Social Distance STAFF: 24

Social Distance CUSTOMERS: 35

PPE STAFF: 55

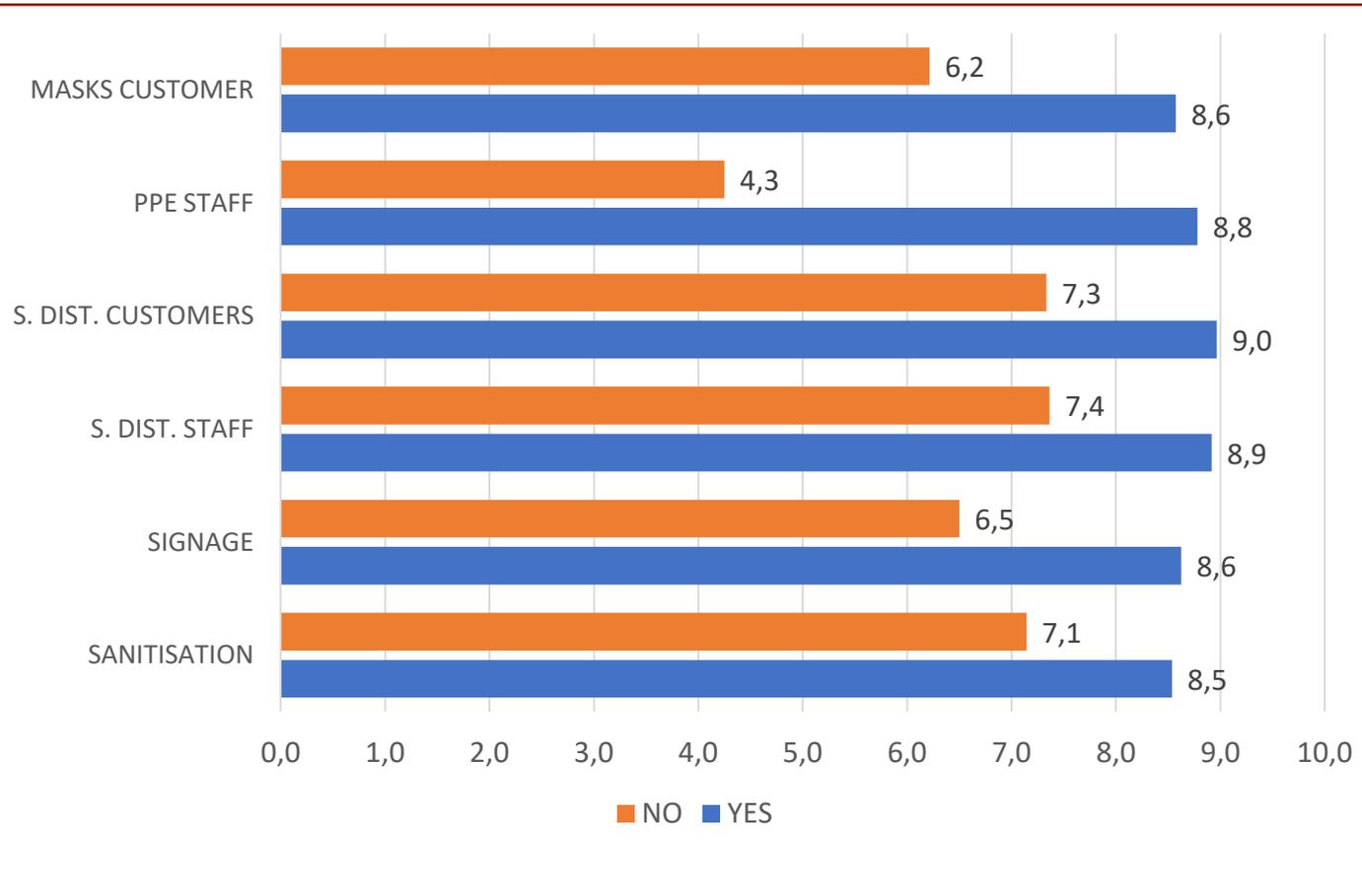
Masks CUSTOMER: 37

Signage and Social distancing by both Staff and Customers are also important influencers of feelings of safety

COMMENTARY

But what drives customer recommendation most?

How do each of the 6 safety measures impact how likely customers are to recommend? The graph bars show recommendation levels out of 10 when the measure exists (blue bar), vs when it does not (orange bar)



The difference (in marks out of 10) between fulfilling or not fulfilling each criteria shows PPE for staff and customers wearing masks are most important:

Sanitisation: 1.4

Signage: 2.1

Social Distance STAFF: 1.5

Social Distance CUSTOMERS: 1.7

PPE STAFF: 4.5

Mask CUSTOMERS 2.4

COMMENTARY

What the people say!

From the mouths of customers...



High score:

“They had hand sanitizer, and everyone was wearing their masks, and they had signs to remind people of social distancing, but I didn't see so many staff members in the store”

“I think they did all of that they could in this situation to prevent disease. The staff can't pay attention and tell the same thing for everyone. In my opinion, the prevention is a personal task.”

VS.

Low scores:



“In the supermarket, the staff try their best to avoid infection and this is very positive. But the social distance is the problem in my opinion. Or I don't like a lot of people touching the same object (shopping cart, products etc.). But this is inevitable in a super market unfortunately.

“My visit was safety observed, but some staff member and costumer wore the mask incorrect way..”

Conclusions

General performance is mixed in Hungary. There is a clear opportunity to improve customer and staff social distancing and it is important for businesses to encourage them to do so. This will inevitably instil more confidence, protect future revenue and, at this particular stage of the Pandemic, to mitigate the risk of infection.

All 6 key measures had an impact on how safe customers felt when out and about shopping, with a direct impact on likelihood to recommend, particularly Staff PPE and encouraging customers to wear masks, which are in businesses control, these also had a significant influence on perception of safety.

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 and above all wear masks. It should not be that difficult, though it sometimes appears to be so. We hope that standards continue to improve, customers will feel safer and recommendations will flow, and this seems to be the case. For now it looks like we all need to try a hard to maintain the basics.

It is clear that 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.