

REBOUNDED FROM COVID-19

HOW WILL THE COMMUNITY RESPOND WHEN
“OHIO OPENS?”

May 2020

GLM 20117

**GREAT LAKES
MARKETING
RESEARCH** 

A large, stylized blue graphic of a camera lens or shutter mechanism, featuring a central white circle and a surrounding white ring, set against a dark blue background.

THROUGH THE LENS OF THE CONSUMER



RESEARCH OVERVIEW

OBJECTIVES	To help businesses plan a strategy for when Ohio Opens
METHODOLOGY	Online surveys
SAMPLE SIZE	n=1,200
GEOGRAPHY	Greater Toledo area
AUDIENCE	Adults 18 and older NW Ohio region (excluding Michigan)
DATA COLLECTION	April 21, 2020 – April 27, 2020



KEY FINDINGS

- There is a significant level of uncertainty in the Toledo community
 - Only 36% of consumers would be comfortable returning to public places once the restrictions are lifted
 - 33% say they are unsure of when they will be comfortable going back to these public places
- Consumers expect the business establishments to do their part
 - Many consumers are expecting significant safety measures to be implemented
 - Social distancing and readily available sanitizing products are expected
- Services that are perceived to be more essential will rebound most quickly
 - Customers are most likely to go back to personal service providers and public places such as fitness centers as soon as the restrictions are lifted
 - A consistent trend is that people of color are less likely to immediately use most of these services compared to whites



Research Overview

Key Findings

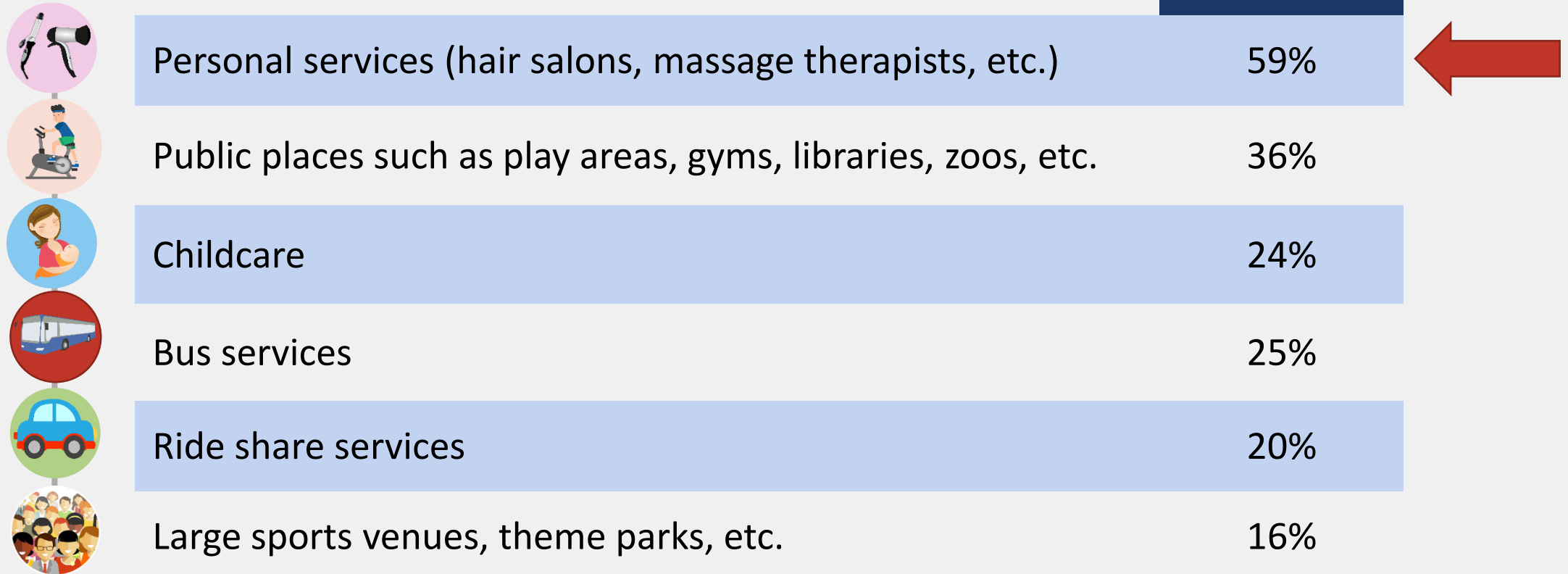
➤ **SURVEY RESULTS**

Conclusions & Recommendations



PERSONAL SERVICES WILL SEE THE MOST TRAFFIC ONCE THE STAY-AT-HOME RESTRICTIONS ARE EASED

When things start to become "open" again, when will you start using the following services?



n=1,200

PERSONAL SERVICES WILL SEE THE MOST TRAFFIC ONCE THE STAY-AT-HOME RESTRICTIONS ARE EASED

When things start to become “open” again, when will you start using the following services?

**Will Use as
Soon as
Available**



Personal services (hair salons, massage therapists, etc.)

59%



Public places such as play areas, gyms, libraries, zoos, etc.

36%



Childcare

24%



Bus services

25%



Ride share services

20%



Large sports venues, theme parks, etc.

16%



n=1,200

www.GLM.com

PERSONAL SERVICES WILL SEE THE MOST TRAFFIC ONCE THE STAY-AT-HOME RESTRICTIONS ARE EASED

When things start to become “open” again, when will you start using the following services?

**Will Use as
Soon as
Available**



Personal services (hair salons, massage therapists, etc.)

59%



Public places such as play areas, gyms, libraries, zoos, etc.

36%



Childcare

24%



Bus services

25%



Ride share services

20%



Large sports venues, theme parks, etc.

16%



n=1,200

www.GLM.com

PERSONAL SERVICES WILL SEE THE MOST TRAFFIC ONCE THE STAY-AT-HOME RESTRICTIONS ARE EASED

When things start to become "open" again, when will you start using the following services?

**Will Use as
Soon as
Available**



Personal services (hair salons, massage therapists, etc.)

59%



Public places such as play areas, gyms, libraries, zoos, etc.

36%



Childcare

24%



Bus services

25%



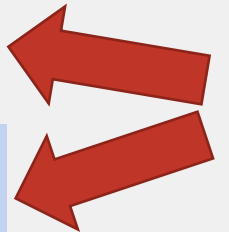
Ride share services

20%



Large sports venues, theme parks, etc.

16%



n=1,200

www.GLM.com

 **GREAT LAKES MARKETING RESEARCH**

10

PERSONAL SERVICES WILL SEE THE MOST TRAFFIC ONCE THE STAY-AT-HOME RESTRICTIONS ARE EASED

When things start to become “open” again, when will you start using the following services?

**Will Use as
Soon as
Available**



Personal services (hair salons, massage therapists, etc.)

59%



Public places such as play areas, gyms, libraries, zoos, etc.

36%



Childcare

24%



Bus services

25%



Ride share services

20%



Large sports venues, theme parks, etc.

16%



n=1,200

SOCIAL DISTANCING AND READILY AVAILABLE SANITIZING PRODUCTS WILL BE A MUST FOR RESTAURANTS

When you visit restaurants again, what will make you most comfortable (after they are allowed to open for sit-down dining)?
[Aided/Multiple Mentions]



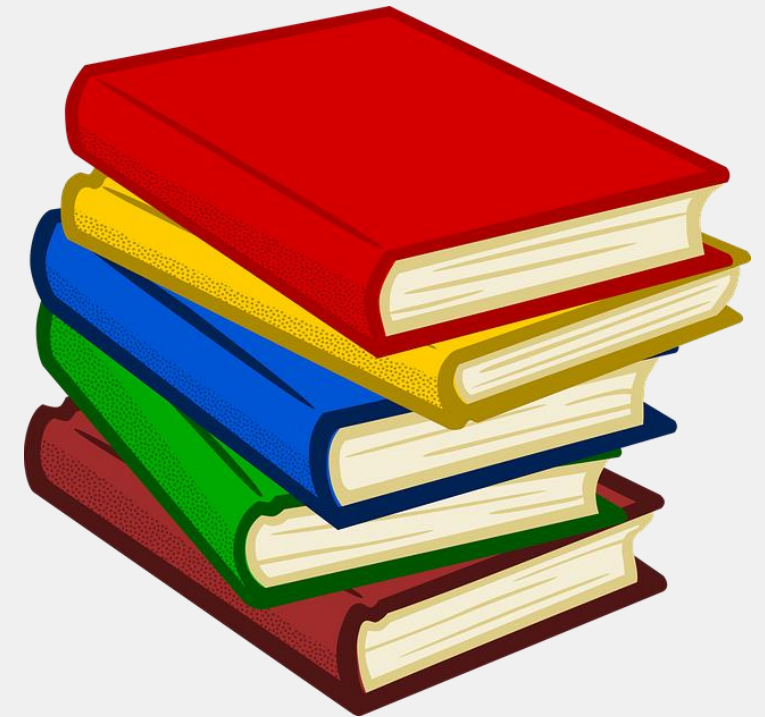
	Will Expect at Restaurant
Social distancing	76%
Hand sanitizing products for guests	75%
Gloves worn by all servers/wait staff	57%
Face coverings on employees	56%
Employees opening doors	43%
Temperature screenings of visitors	28%
No changes in expectations	16%

n=1,200

COMMUNITY MEMBERS WILL BE EXPECTING LIMITED OCCUPANCY AND SANITIZING WIPES IN PUBLIC PLACES

When you visit public places again, what do you expect to happen or occur? [Aided/Multiple Mentions]

	Will Expect on Site
Sanitizing wipes for visitors	74%
Limited occupancy (social distancing)	72%
Face coverings on employees	58%
Gloves worn by all employees	48%
Masks made available to visitors	45%
Temperature screenings of visitors	34%
Gloves available for visitors	32%
No changes in expectations	17%



n=1,200

FITNESS CENTERS WILL BE EXPECTED TO REQUIRE AND MONITOR THE USE OF SANITIZING PRODUCTS ON ALL SURFACES

When you use gyms/workout classes/fitness centers again, what do you expect to happen or occur? [Aided/Multiple Mentions]



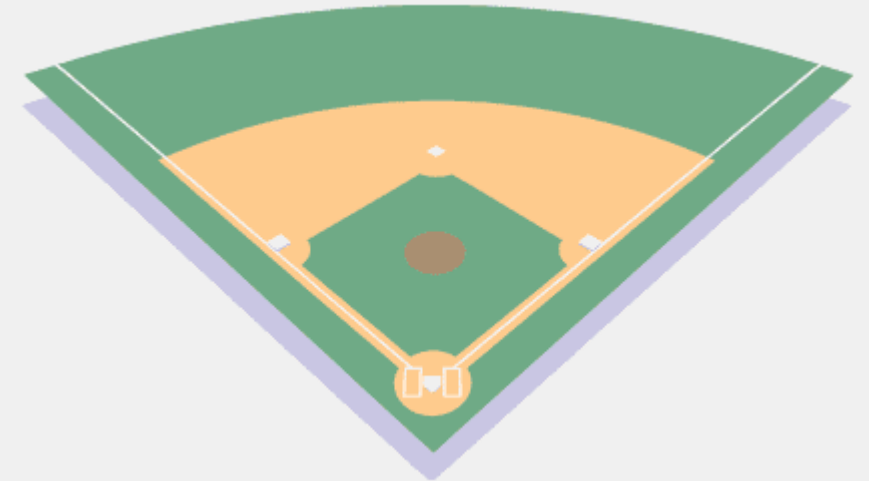
	Will Expect on Site
Required and monitored use of sanitizing products on equipment and all surfaces	79%
Limited occupancy (social distancing)	73%
Face coverings on employees	52%
Masks made available to participants	48%
Gloves worn by all employees	43%
Temperature screenings of participants	40%
Gloves made available to participants	38%
No changes in expectations	17%

n=1,200

LIMITED TICKET SALES AND EASILY ACCESSIBLE SANITIZING PRODUCTS WILL BE THE NEW NORMAL FOR LARGE VENUES

When you visit large sporting or public events again, what expectations will you have during the “phasing in” period?
[Aided/Multiple Mentions]

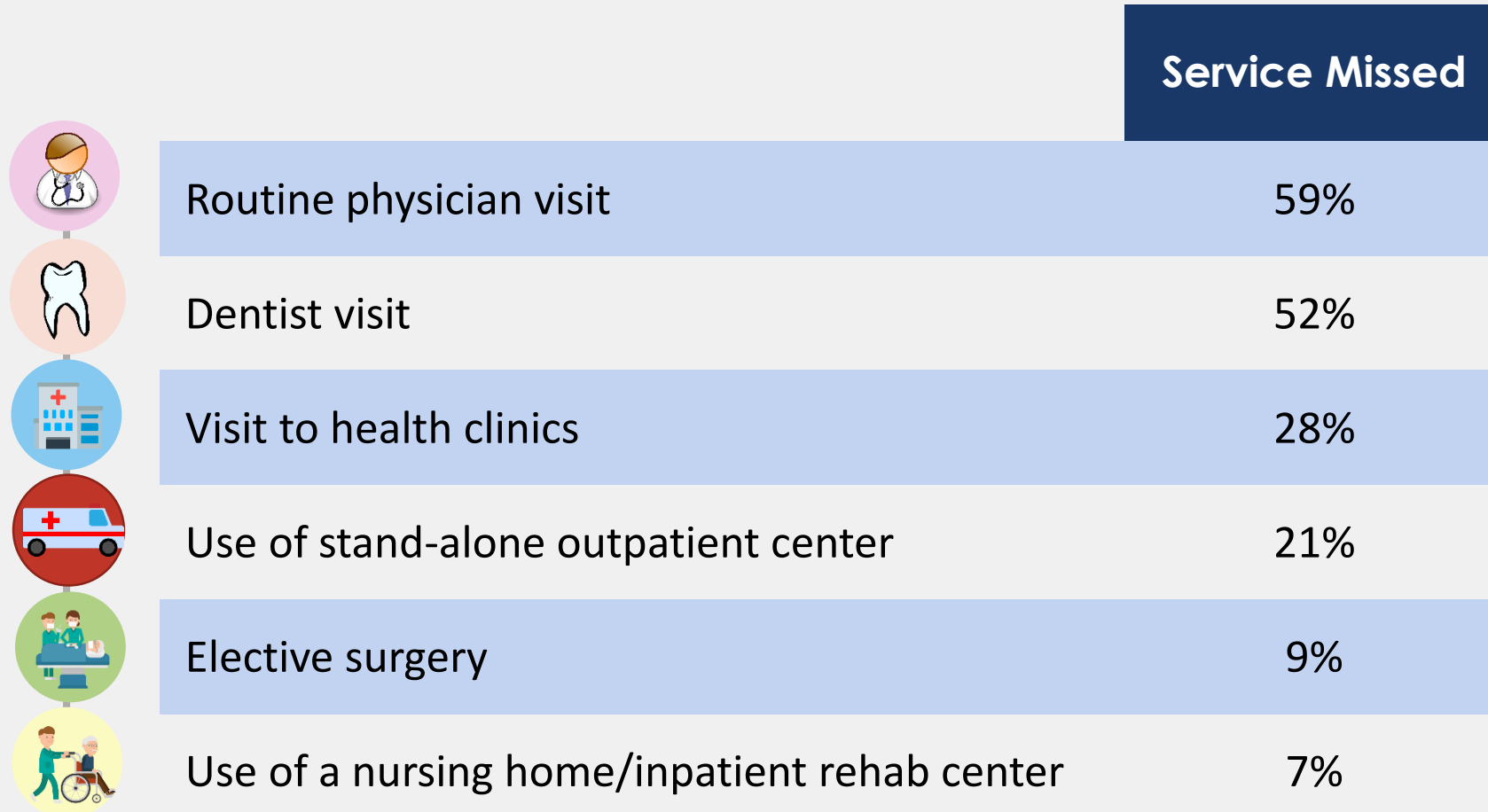
	Will Expect at Venue
Sanitizing products located within the venue	78%
Limited ticket sales (social distancing)	66%
Face coverings on employees	62%
Sanitizing wipes for visitors	59%
Gloves worn by all employees	55%
Relaxed social distancing	44%
Temperature screenings of visitors	38%
Gloves available for visitors	32%
No changes in expectations	17%



n=1,200

MANY COMMUNITY MEMBERS CANCELLED APPOINTMENTS FOR HEALTH CARE SERVICES

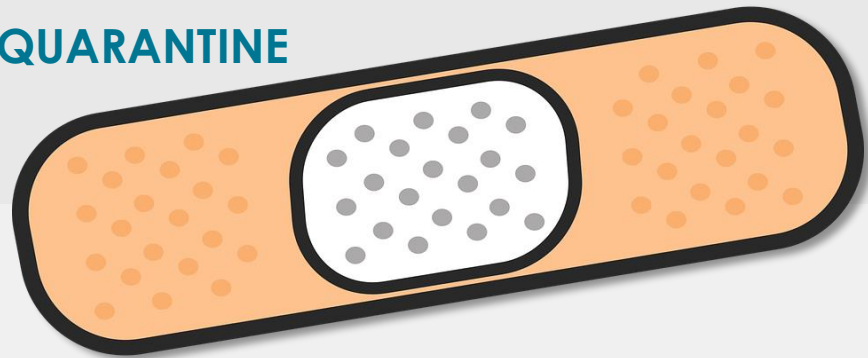
Did you cancel the following service (or was it cancelled for you) because of the stay-at-home orders/required closures?



n=1,200

FINDING ALTERNATIVES

9% OF THOSE SURVEYED NEEDED SOME FORM OF MEDICAL ATTENTION DURING QUARANTINE



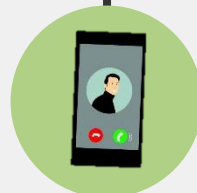
OF THOSE WHO NEEDED MEDICAL ATTENTION:

- 9% did not seek care

AMONG THOSE WHO NEEDED CARE...



40% visited an emergency room



38% used telemed/video chat with a health care professional



37% called, emailed, or messaged a health care professional



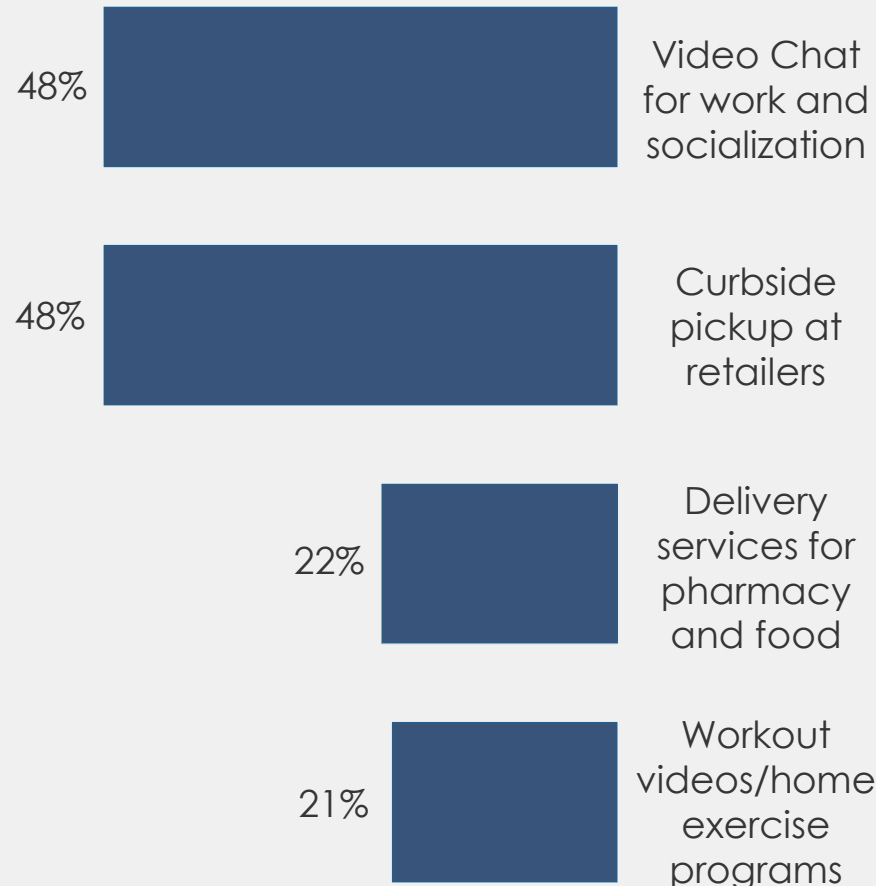
26% visited urgent care



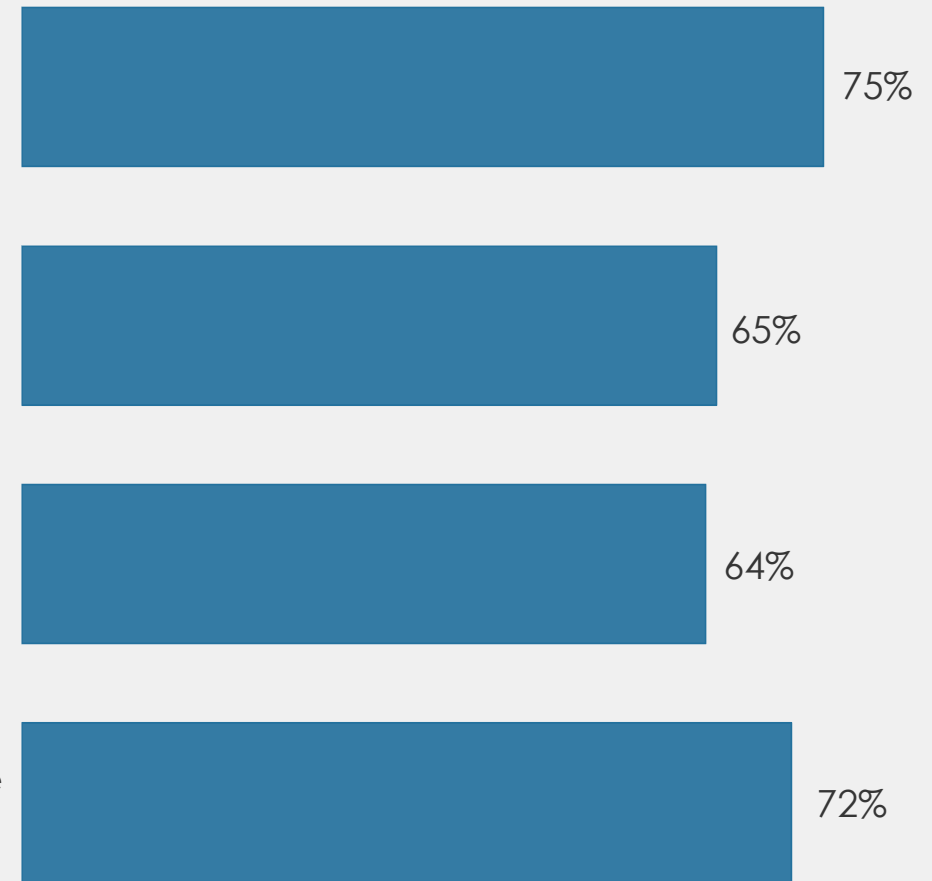
12% sought advice using an online resource

TRIAL LEADS TO ADOPTION

USED SERVICE DURING PANDEMIC



WILL CONTINUE TO USE POST-PANDEMIC



n=1,200



THE CHALLENGE

**SEE YOURSELF THROUGH
YOUR CUSTOMERS' LENS**

THE CUSTOMER JOURNEY



THE GOOD

This creates opportunities to make an impression



THE BAD

Most consumers are unsure of when they will feel comfortable going back to life as normal



THINK OF THE CUSTOMER FROM START TO FINISH

Community members want to experience a safe, clean environment



The first point of *physical* contact with your business



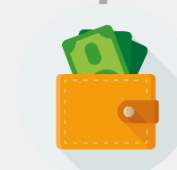
The first interaction with an employee



The ongoing interaction with surrounding customers



The touching of various surfaces (menus, tables, workout equipment, etc.)



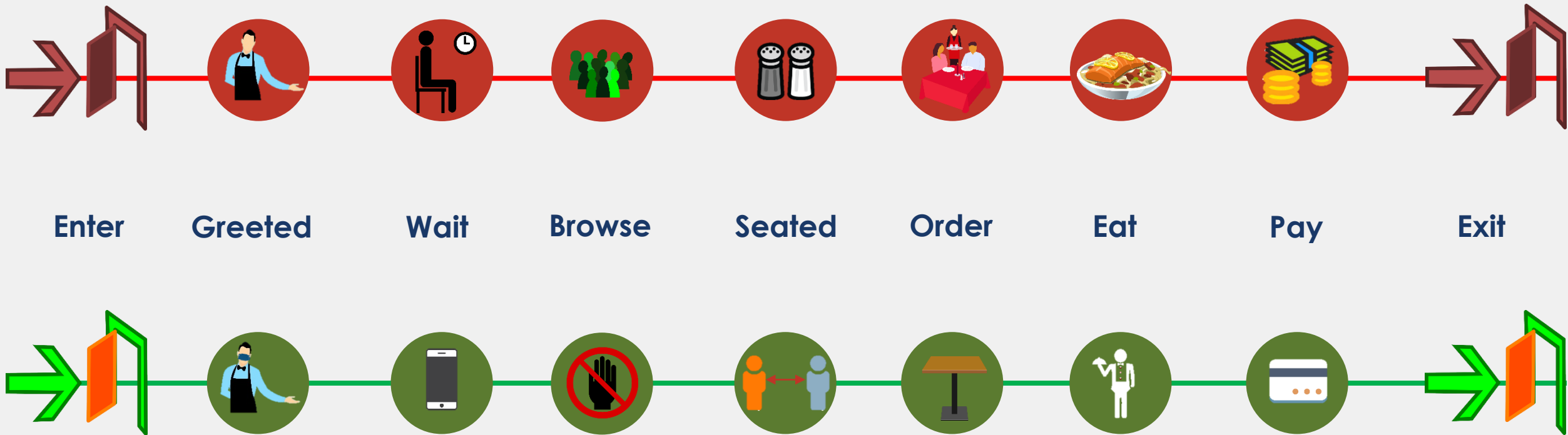
The necessary monetary transaction



The final evaluation

RETHINK YOUR CUSTOMER'S JOURNEY

Think of the customer from start to finish: Community members want to experience a safe, clean environment.



REBOUNDED FROM COVID-19

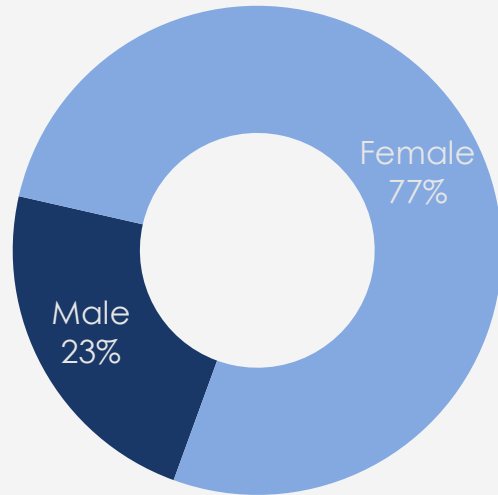
LDIXON@GLM.COM

419-534-4710

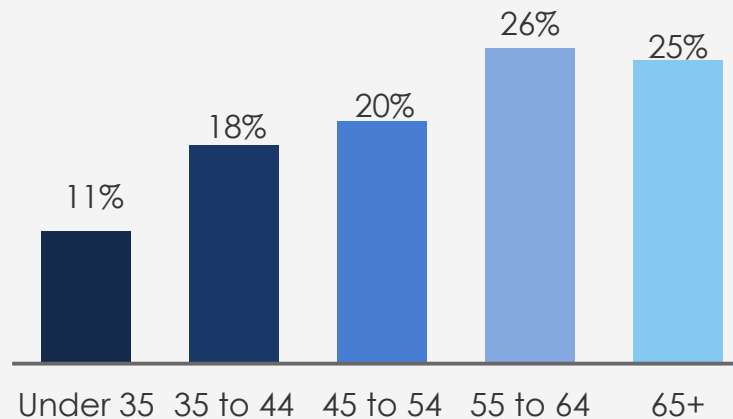
**GREAT LAKES
MARKETING
RESEARCH** 

RESPONDENT PROFILE *(n=1,200)*

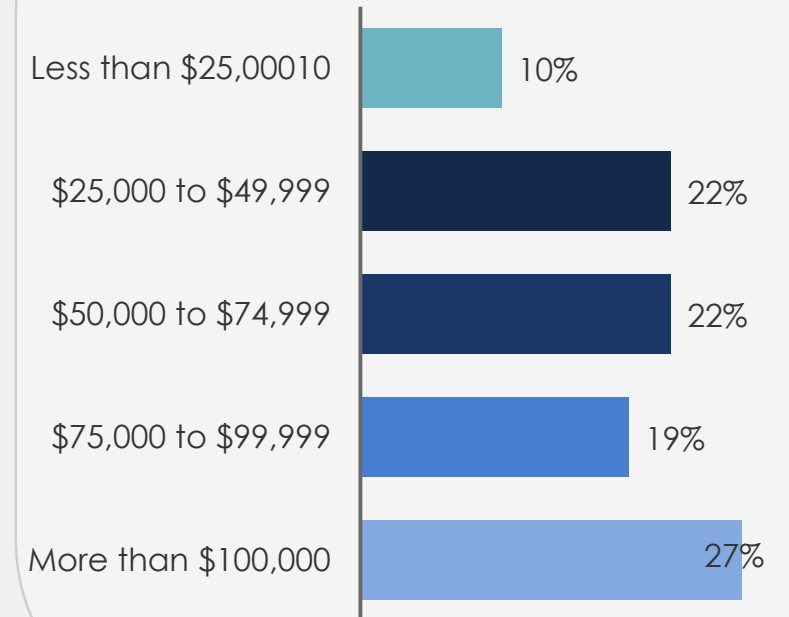
Gender



Age



Income



Ethnicity



Just over one-third (36%) of NW Ohioans will be ready to return to public places once the stay-at-home restrictions are eased