

REBOUNDED FROM COVID-19

How will the community respond when “Ohio Opens?”

*Community Survey of
1,200 adults in NW Ohio*

April 29, 2020

GLM 20117

**GREAT LAKES
MARKETING
RESEARCH** 

3361 EXECUTIVE PARKWAY, SUITE 200 | TOLEDO, OH 43606
TEL 419.534.4700 | WWW.GLM.COM

REBOUNding FROM COVID-19

April 29, 2020

Toledoans are being cautious about how they will venture out when the shelter-in-place restrictions are loosened. To ease concerns, public places will need to make the community feel safe when they decide to venture outside of their homes.

In our survey of about 1,200 adults in Northwest Ohio, only 36% said they are ready to return on opening day to public places such as libraries, zoos, play areas, gyms, and movie theatres. It will take a few additional months before these venues see over half of their regular users back. A full one-out-of-three who visit these venues said they do not know when they will be comfortable making a return visit.

Survey responses were collected between April 21 to April 27, 2020, just prior to the official easing of regulations. These results send a strong message to venues, service providers, and retailers that visitors and customers will expect safety measures in place. It will not be business as usual.

The table below shows the percentage of community members who use those venues or services and who say they will use them again as soon as they open. Customers are most likely to go back to personal service providers as soon as they are allowed and least likely to return to events at the large venues. A consistent trend is that people of color are less likely to immediately use most of these services compared to whites.

Research Methodology

A survey link was emailed to GLM's proprietary **ASKTOLEDO** consumer opinion panel. Responses were collected April 21 to April 27, 2020.

	Will Use as Soon as Available
Personal services (hair salons, massage therapists, etc.)	59%
Public places such as play areas, fitness centers, libraries, zoos, etc.	36%
Childcare	24%
Bus services	25%
Ride share services	20%
Large sports venues, theme parks, etc.	16%

Restaurants. Restaurants will need to implement significant changes to make patrons feel safe when they come for a sit-down meal. Social distancing and sanitizers top the list of new procedures, but more than half would expect staff to be wearing face coverings and gloves. Access to safety products combined with limited seating will make it challenging for restaurants to make a financial rebound when the dining areas open again. The following table shows what guests will expect when they come inside for meal. Note that only 16% would not expect any changes—and most of these adults are under the age of 35.

	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%

Public places. Community members who formerly used libraries, zoos, movie theatres, etc., are hesitant about returning as soon as they are able. While 36% would return immediately, the rest are waiting a few months or even until the Fall to visit these places. Nearly all would expect to see sanitizing wipes and social distancing, while some want face coverings on employees and guests. The table below shows what the public will expect when they come back, with less than 20% saying they expect no changes.

	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%

Fitness centers. Community members returning to their gyms and fitness classes will have heightened expectations for sanitizing the equipment and all surfaces, and social distancing. These expectations come with new challenges for gym operators to train the personnel and participants on new protocols. The table below shows that people will want visual confirmation that sanitizing is required and performed.

	Will Expect on Site
Required <i>and monitored</i> 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%

Large venues. Only 16% said they would return to large venues as soon as they open. Over one-half are unsure when they will feel comfortable returning. But, when patrons do come back, they will expect more space between them and their neighbor. Along with sanitizing products readily available, two-out-of-three expect limited ticket sales. Not only will this require extensive inventories of supplies, but also necessitate employee training on how to use masks and gloves correctly. The following table shows what the community will expect as a result of the pandemic.

	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%

Health care services. Several community members cancelled routine visits with their doctor and dentist, with some moving back elective surgeries and inpatient care. However, nearly two-out-of-three will reschedule those health care services as soon as their health care provider tells them it is safe. The table below shows the percentage of health care services cancelled or postponed.

	Service Missed
Routine physician visit	59%
Dentist visit	52%
Visit to health clinics	28%
Use of stand-alone outpatient center	21%
Elective surgery	9%
Use of a nursing home/inpatient rehab center	7%

During the pandemic, about 9% of the community said they had a need for urgent or emergency care. About 40% of them used an emergency room, and an additional 26% visited an urgent care. However, 38% chose to use a telemed option and 37% communicated with their health care professional by phone or other digital options. Over half of those who used telemed services said they will continue to use this alternative in the future. The table below shows how the community solved their emergency or urgent health care need during the pandemic.

	Service Used for Emergency/Urgent Care
Visited emergency room	40%
Used telemed/video chat with a health care professional	38%
Called, emailed, or messaged a health care professional	37%
Visited urgent care	26%
Sought advice using an online resource	12%
Did not seek medical care or attention	9%

As the state reopens, only 54% will immediately use urgent or emergency care services if the need should arise. This indicates that community members may continue to use alternative health care options for several months.

New services used. The stay-at-home requests encouraged some community members to try new services and use their home for socializing and exercise. More importantly, these data show that post the pandemic, many Toledo area residents will continue with these new habits. The new normal may not just include gloves and face coverings; it may include a much higher propensity to spend less time shopping and more time on virtual visits. The table below shows the new services that were used and the percentage who will continue using them after the stay-at-home orders are eased.

	Will Continue Using Post-Pandemic
48% used video chat	74%
48% used curbside pickup at retailers	65%
22% used delivery services for pharmacy and food	64%
21% used workout videos/home exercise programs	72%

Conclusions

These findings show that as businesses welcome the public post-pandemic, their customers will expect visual confirmation that their well-being is safeguarded. This will require public establishments to customize safety protocols for their staff and customers that accommodate their work flow and traffic patterns inside their buildings, and physical structures. And, add to that challenge the fact that people visit restaurants and attractions to have fun and relax. So, while the staff is wearing gloves and face coverings, the atmosphere still needs to be welcoming. At no time in our history of researching consumer attitudes has it been more apparent that businesses are expected to put the customer first—not just with good service, but with overt attention to the mental and physical health of the guests.

Appendix

Profile of sample members

Household Income Level

Less than \$50,000	32%
\$50,000 to \$100,000	41%
More than \$100,000	27%

Age

Under 35	11%
35 to 44	18%
45 to 54	20%
55 to 64	26%
65+	25%