

REBOUNDED FROM COVID-19

***How the Community is Responding
to the Opening of Ohio***

*Community Survey of
400 Toledoans*

June 15, 2020

GLM 20117

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

HOW THE COMMUNITY IS RESPONDING TO THE OPENING OF OHIO

June 15, 2020

We're back. One month ago, on May 15, Ohio reopened restaurants and bars for outdoor seating. Hair salons, barbershops, and other personal care services also opened on May 15 with specific restrictions in place. Indoor restaurant seating followed shortly after, reopening on May 21. So, as of June 15, three weeks into being able to get back to socializing (though at a distance), Toledoans are venturing out at a cautious pace – just as they said they would.

About 42% have been to a hair salon/barber shop and 40% have either dined inside or outside at a restaurant. However, only 7% believe the pandemic is over.

Most Toledoans who tried a new retailing option, such as curbside pickup, or used new technology to remain social, while distanced, such as video chats, did so in the first few weeks after the shelter-in-place guidelines were introduced. Merchants can plan on these services still being used post-pandemic but should not expect an increase in users.

Research Methodology

A survey link was emailed to GLM's proprietary **ASKTOLEDO** consumer opinion panel. Responses were collected **June 5 to June 8**, 2020.

The Impact of the Pandemic

Despite more traffic and visits to beauty salons and restaurants, only 7% of Toledoans think the pandemic is over. This means retailers, service providers, and restaurants need to continue all efforts to make their customers and patrons feel safe. Many (37%) do not believe the pandemic can be considered past tense until a vaccination is available.

	The "Signal" the Pandemic is Over
<i>When there is a vaccination</i>	37%
When no new cases are reported	26%
When they relax the social distancing regulations	15%
<i>I think it is over now</i>	7%
When I see everyone out and about without masks	7%
Decline in the number of cases/deaths	3%
When medical professionals say it is	2%
Don't know	3%

About two-thirds of the respondents said the pandemic has had a significant or strong impact on their family. Interestingly, the impact has not been stronger for any particular age group or gender.

	Impact of Pandemic on Family
Significant impact	23%
Strong impact	41%
Slight/no impact	36%

Among those who say the pandemic has had a significant impact on them and their family, the reasons range from the death of a family member, feelings of isolation, cancelling major trips, postponing weddings, and not getting hugs from loved ones. The impact is more about the physical distancing from people than about not getting access to necessities. (The full list of reasons is in Appendix Two.)

Restaurants

In our first survey during the third week of April, about 36% of the respondents said they would visit public places when they re-opened. True to their word, 40% have already used either indoor or outdoor seating at a restaurant.

	Used Since Ohio Opened
Total restaurant usage since Ohio opened	40%
• Dined inside	30%
• Dined outside	24%

The good news is that 92% of those dining indoors rated their experience with the pandemic procedures instituted by the establishment as excellent or good--and those dining outside also had above average experiences. These experiences should lead to positive word-of-mouth and give restaurants affirmation that they are doing a good job making customers feel safe. As the numbers show, about three-out-of-four or more believe their experience has made them more likely to continue dining out.

	Experience with Pandemic Procedures	
	Dining Inside	Dining Outside
Excellent	59%	56%
Good	33%	28%
Average/Negative	8%	16%

	Impact of Experience with Pandemic Procedures	
	Dining Inside	Dining Outside
More likely to get back to normal routine	83%	74%
Less likely to get back to normal routine	17%	26%

Hair Salons/Barber Shops

In April, we learned that a popular service Toledoans wanted to get back to using was their hair care specialist. And, true to their word, Toledoans were most likely to have visited their barber or beautician. Forty-two percent (42%) have been to a hair salon and most said the pandemic procedures followed made for an excellent experience. Further good news is that 87% are more likely to get back into their routine based on their most recent experience.

	Experience with Pandemic Procedures
Excellent	71%
Good	22%
Average/Negative	7%

	Impact of Experience with Pandemic Procedures
More likely to get back to normal routine	87%
Less likely to get back to normal routine	13%

Vacation/Travel

Many Toledoans who planned to take vacations that entailed air travel are choosing to be grounded this Summer and Fall. About half of the region planned to travel by air this year; however, 30% still plan to take that trip in 2020. The rest have already cancelled or are still waiting to make final decisions.

	Planned a Vacation with Air Travel (between now and Jan. 1)
Were planning a vacation with air travel this year	50%
<i>Still planning to take the vacation</i>	30%
<i>Not planning to take the vacation</i>	41%
<i>Not sure if will take the vacation</i>	29%
Had not planned to take a vacation with air travel	50%

Major Events, Concerts, or Sports Events

Of those who normally buy tickets to events (which is 94% of the respondents), 17% will buy tickets as they normally did. The rest are making adjustments, such as waiting until closer to the event date, or foregoing buying tickets. Many are in a holding pattern and are not sure when they will feel comfortable buying tickets again.

	Intent to Purchase Tickets to Events
I will wait until closer to the event, to be more sure the event will occur	34%
I don't think I will buy tickets for major events for the foreseeable future	28%
I will buy tickets as I normally did	17%
I will wait until the absolute last minute to purchase tickets	3%
I am not sure	17%

	Will Buy Tickets Today if the Event is Scheduled For:
July to August (2020)	24%
September to October (2020)	19%
November to January (2021)	14%
Not sure	43%

New Services and Changing Behaviors

By April, most Toledoans who were finding a work-around solution to handle staying at home had tried out a variety of services. Between April and June, only a handful of additional people were still trying new services. These data describe a few trends. First, people adjusted quickly after the shelter-in-place guidelines were established. Second, those service providers should expect the use of these new services to level off. Another interesting trend is that users of those services plan to continue using them after the pandemic. This indicates that the investments made to create or ramp up new offerings will be worth the effort. It also indicates that the consumers' expectations will have changed due to their experiences during the pandemic.

	Used for First Time		Will Continue Using	
	June 5	April 21	June 5	April 21
Curbside pickup at retailers	48%	47%	60%	61%
Video chat	40%	45%	70%	75%
Telemed	24%	21%	59%	52%
Online grocery shopping*	23%	-	81%	-
Delivery services for food	19%	21%	61%	62%
Workout videos/home exercise programs	14%	17%	76%	72%
Mobile banking*	11%	-	83%	-

*Service was not asked in April 21 survey.

In addition to trying new services, half of Toledoans said they are using locally-owned restaurants and retailers *more* than they normally did.

	Using More Locally-Owned Restaurants/Retailers
Yes	50%
No	50%

Hobbies/Activities

Consumers have had to find creative forms of entertainment since the pandemic. Besides increased walking, biking, and other exercise, Toledoans are more likely to be playing games and putting together puzzles, reading, and engaging in other home-based activities. Eighty percent (80%) or more plan to continue these new-found hobbies after the pandemic.

	Doing More	Will Continue Doing
Walking	51%	96%
Games/puzzles	42%	86%
Reading	40%	97%
Baking/cooking	39%	96%
Gardening	34%	92%
Exercise/yoga	20%	96%
Biking	16%	88%
Painting/drawing/photography	11%	93%
Learning a new skill	11%	81%

Movie Theaters/Movies

Prior to the pandemic, 75% of Toledoans had been to a movie theater in the past year. Moving forward, it appears that about 40% will visit the theaters this summer but many are holding off their return to the big screen. Part of the reason may be that nearly three-out-of-four have been watching more movies at home. One-in-five assume they will rent *fewer* movies after the pandemic—indicating that in-home movie nights are not expected to go away.

	Comfortable Going to a Movie Theater Again
When they open/shortly after	33%
This summer	8%
This fall/winter	20%
Early 2021	11%
Not sure	29%

	Movie Watching at Home
Watching more rented movies (streaming, VOD, etc.)	37%
Watching more free movies	36%
Have not watched more movies	27%

Conclusions

The post-pandemic consumer is going to behave differently compared to the pre-pandemic consumer. These findings indicate that consumers have chosen to use new services to solve problems posed by the shelter-in-place guidelines, and they plan to continue using them after the pandemic. Businesses that thought some of their business model changes were temporary may need to rethink, just as consumers are rethinking.

Appendix One

Profile of Sample Members

	Household Income Level (June 5)	Household Income Level (April 21)
Less than \$50,000	32%	29%
\$50,000 to \$100,000	41%	42%
More than \$100,000	27%	29%

	Age (June 5)	Age (April 21)
Under 35	10%	10%
35 to 44	17%	17%
45 to 54	17%	19%
55 to 64	25%	25%
65+	31%	28%

Appendix Two

Reasons why Pandemic has had a Significant Impact

Loss of Physical Connection

- Cannot visit family, especially sister who is in a facility for Dementia. Cannot take snacks, etc. to her either. Miss hugs.
- Not being able to see and hug my friends and family.
- Not being able to see my family because they no longer live at home. I missed the birth of my first grandchild, I cannot visit my mom/dad elderly and dad fell and broke hip so I cannot go help, my brother just had kidney replaced and I cannot visit to help his wife and kids, I miss hugs, lots of hugs. I cannot go visit the new baby. I cannot help my mom and dad when they need me the most.
- Not feeling comfortable visiting family members due to risk of spreading disease. Not feeling good about hugging children and grandchildren, seeing grandkids cry and be unhappy due to no hugs.
- Not seeing family as frequently or being able to hug.
- Not feeling comfortable allowing my grandparents to hold my infant.
- Loss of contact with others.
- Not being able to celebrate milestones because we can't physically connect.
- Staying at home almost 24/7, wearing a mask outside of house, restricting friends and relatives visits to internet.
- I am immunocompromised and cannot risk getting the virus. I have been home since March 9th except for an occasional trip to pick up groceries. I want my life back. I want to feel safe to visit a restaurant, or shop in a store. Most especially I want to be able to see my granddaughter and my extended family in person.
- Not being able to get together and the challenge to purchase necessary items with minimal contact with others.
- I'm one of Jehovah's Witnesses. We have not been able to go to our congregation meetings in person and we have not been able to preach to people from door to door.
- Not seeing and visiting with friends and family.
- We can't visit with our family as we normally would.

Emotional Issues

- Closing schools, being off work, staying home, stress
- The concern and even fear of being around other people.
- We are both over 60 years old and have medical issues already and don't want to put ourselves at risk for a positive diagnosis for the virus. It seems that the government isn't worried about losing a few old people because I feel like they want to clear out the older at-risk people from Medicare and the burden of caring for them.
- Trying to keep my 15-year-old son with cystic fibrosis safe to protect his lung function. And experiencing severe anxiety and panic attacks because of the virus.
- Staying home so much. Being fearful.
- Proving that many people do not care about the well-being of others.
- Very stressful and frustrating.
- School and daycare being closed and unable to go to work due to that. My husband and I both work in healthcare so the impact has been huge on our daily jobs.
- I work at a hospital, so I got to see firsthand the impact of Covid-19 on patients. I was working very long hours during this time.

Shelter-in-Place

- Work, finding ways of entertainment.
- Working and school from home.
- Nowhere to go.
- We went out to lunch almost every day and now we order to carry out.
- Not being able to go anywhere to eat or for entertainment. Not being able to socialize.
- Not being able to go to the Y and exercise, meet friends for lunch or dinner, go to live shows, go to the movies, take my vacation, watch my grandkids play sports that were all canceled, not being able to go to a nice clothing store or the mall, having my physical therapy canceled. I'm sure there is more.
- Since I fall into the highly vulnerable category, I mostly stay home. I might go to the dumpster across the parking lot from my apartment or to the kiosk to pick up mail, but that's it. I have gone to the bank (drive-up window only), the gas station, the drive-up pharmacy window, a few fast-food restaurant drive-up windows, and a drive-through open-air lottery outlet, but nowhere else. Family gets my groceries, but I've not been inside any store since mid-March due to the quarantine.
- Staying home for days.
- Staying in our own homes and avoiding contact with our family and grandchildren.
- Spending more time together.
- The adjustment of being home all of the time.
- Home school
- Having to stay in to stay safe and not being able to be with family and friends.
- Not being able to shop at retail stores and eat out at restaurants. Also, my son lost his job and income. My mother-in-law had to stop her therapy due to virus.

Major Cancellations

- We had a wedding scheduled for my son at the end of May. It is postponed until October. Not squeezing my grandchildren
- We planned two European vacations this year and both were cancelled.
- Class Reunion cancelled. Had been in beginning stages of European trip planning for summer, which is now abandoned. Husband is working from home. We miss seeing friends. Everything is different, but we are open to learning new ways of doing things.
- Working from home while also attempting to teach 1st grade, not being able to go to restaurants, cancelling three vacations, theatres (not movie; theatrical productions) being closed, and New York City being on lockdown (we travel to NYC about four to five times a year).
- No summer camp programs, unemployment, reduced local recreation options
- I had planned on attending many events during the last few months, but all were cancelled. Instead of having a very active Spring I have been spending almost all my time at home.
- Older kids lost jobs or had job starts delayed. Missed in person high school and college graduations. All four kids had to go to online school.
- Postponement of destination wedding
- Travel restrictions

Feelings of Isolation

- Isolation and not being able to see or go visit my family. Our planned plane trip was cancelled, then worry about my Mom. As she is out of town, I have not been able to visit her.
- Separation from friends and family. Miss church attendance.
- Fear and isolation have been the biggest impact.
- Social isolation. I just had pneumonia and I don't feel strong enough to take risks.
- Social distancing
- As a widow, meeting friends for dinner was my main social life. Not seeing friends and family was the biggest impact.
- Going out to eat and socialize with friends and family.

Financial Hardship

- Being laid off from work
- Decreased income
- Employer having to shut down during the pandemic. Loss of income.
- Financially, unemployment, restrictions on visiting family
- I lost my job.
- My wife lost her job and my job hours have been reduced.
- Unemployment

Loss

- My uncle and aunt died from Covid-19.
- Personally, impacted by the virus
- Death of a relative
- Trying to work from home plus be a homeschool teacher to 2 middle school agers. Also, my mom was very sick in the hospital not being able to visit her due to the pandemic she passed away without any of the family by her side in the hospital. It's been a very bad year for me and my family.

Increased Health Concerns

- I am immunocompromised due to breast cancer treatments. Having to be so careful of being around anyone has really impacted my everyday living.
- I refuse to set foot in any building not requiring mandatory masking. Also, will not purchase food from retailers not offering curbside
- A daughter being sent home from Cleveland Clinic one day before surgery in March. Then not being able to get this surgery until mid-July. Needing to distance from her and not sit with her during her immunotherapy treatments.
- Being extremely cautious having a newborn at home.
- Off work for about three months. We stay home period. No friends or family allowed in our yard. All groceries are ordered online and delivered or picked up curb side. Drive through banking and prescription pickups. Anything we need or want is ordered online and delivered. Wear masks and/or gloves when needed. Dr. Appointments by phone or online when possible.
- I have been unemployed since the beginning and no idea when I might go back to work. Also, immunocompromised so staying home is my best health option.
- I have been unemployed since March. I have a daughter with a comprised immune system and respiratory issues. I have had to be very careful and not go out in public much either so that I do not bring it home to her.

Access to Necessities

- Trying to buy necessities because they are still out of stock or limited.
- Not being able to go do normal shopping has been a huge hurdle. Both kids outgrew clothes and shoes during this. Not being able to take them shopping and try things on is hard.
- Not being able to get basic supplies like the laundry detergent we need for sensitive skin has been a huge problem.