Research Report on Reopening

The attached report summarizes findings of two recent surveys conducted by the Allegheny Conference:

1) *Business Preparedness for Reopening and Perspectives on Recovery.* This survey polled over 300 businesses in SWPA on issues related to recovery timing and preparedness for reopening, and identified the area when businesses lack the most confidence and/or require the most help to be ready for safe reopening. The key findings include:

- The region’s businesses are confident that they will be able to make a relatively fast recovery, with 60% of businesses expecting to be fully open by the end of June and 43% of businesses anticipating their output returning to pre-pandemic levels within 6 months.

- When considering what will influence the decisions to reopen their business, the top triggers include the lifting of the stay-at-home order, preparedness of employees to behave safely in workplace and having clear guidance from policy makers on workplace safety requirements.

- Businesses are actively preparing for reopening. The most common efforts they are undertaking are developing policies and procedures to prevent the virus spreading in the workplace and procuring PPE/masks and other supplies/services needed to ensure effective workplace sanitation.

- Businesses, particularly smaller and regional firms, do not feel well-equipped to handle all the practicalities of stipulated conditions for reopening. Only about half of firms feel relatively confident in their ability to recall laid off employees, ensure proper sanitation and perform employee health screening.

- What businesses would find most beneficial to prepare for reopening would be to have a better understanding of Pennsylvania’s reopening strategy and protocols. The smaller and regional businesses also need particular help in accessing PPE and sanitation supplies, developing protocols for employee health screening, and motivating employees to return to the workplace.

- While nearly all businesses have taken some measures to adjust to the disruption of COVID-19, smaller and regional businesses were more likely to apply for new forms of financing. These smaller and regional businesses were also more likely to be unsuccessful in actually securing the additional financing.
2) Consumer Sentiments on Economic Conditions and Preparedness for Reopening. This survey (conducted in collaboration with Schmidt Market Research, Inc.) has been occurring in bi-weekly waves since the end of March, and has polled over 2,500 SWPA residents. The key findings of the third wave include:

- Respondent’s sentiment towards the national and regional economy has declined throughout COVID-19.

- Respondent’s sentiment towards employment, personal finances, and spending has held relatively steady throughout COVID-19.

- A majority (60%) of respondents believe that reopening in early May is too soon, with very little thinking it is not soon enough. Most believe that the region’s economy won’t fully reopen until summer.

- While most respondents would like to see a long-term downward trend in cases and/or a vaccine in order to make them most comfortable to return to work, their “must haves” include access to sanitizer, frequent deep cleaning, masks, social distancing, and flexible sick leave policies.

- Respondents have similar desires to help them feel safe when it comes to going to grocery stores, general retail stores, restaurants, and events. The one main exception is that most respondents don’t expect customers to wear masks at restaurants.
Business Preparedness for Reopening & Expectation for Recovery

- Survey; disseminated on April 24 to a broad distribution list of businesses and organizations with a presence in SWPA; responses collected between April 25 and May 4, 2020

- **312 businesses responded** to date
There is a strong confidence in fast recovery among the region’s businesses. Close to 60% of businesses expect to be fully open by the end of June. About 43% anticipate their output returning to pre-pandemic levels within 6 months. Nonetheless, uncertainty and inability to adequately predict both the reopening and recovery is relatively high.
Employers with a national presence predict the **fastest reopening** of their businesses. Over 72% expect to be fully open by the end of June. On the other hand, only 45% of the firms with a global presence expect the same. Firms with 251-1,000 have the lowest expectation (40%) to be open by the end of June; they are also the most unsure about their reopening timeframe.

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**When do you expect your business to FULLY reopen in the Southwestern PA region?**

All Businesses by Presence and Size

<table>
<thead>
<tr>
<th></th>
<th>Regional</th>
<th>National</th>
<th>Global</th>
<th>Less than 100 employees</th>
<th>101-250 employees</th>
<th>251-1000 employees</th>
<th>1000+ employees</th>
</tr>
</thead>
<tbody>
<tr>
<td>Already fully open</td>
<td>59%</td>
<td>72%</td>
<td>45%</td>
<td>16.9%</td>
<td>16.9%</td>
<td>16.9%</td>
<td>11.1%</td>
</tr>
<tr>
<td>By mid-May</td>
<td>18.6%</td>
<td>15.4%</td>
<td>15.4%</td>
<td>10.3%</td>
<td>13.8%</td>
<td>13.8%</td>
<td>16.7%</td>
</tr>
<tr>
<td>By end of May</td>
<td>15.3%</td>
<td>16.9%</td>
<td>6.9%</td>
<td>6.9%</td>
<td>16.9%</td>
<td>16.9%</td>
<td>16.7%</td>
</tr>
<tr>
<td>By end of June</td>
<td>7.9%</td>
<td>7.7%</td>
<td>6.9%</td>
<td>6.9%</td>
<td>16.7%</td>
<td>16.7%</td>
<td>16.7%</td>
</tr>
<tr>
<td>By end of July</td>
<td>13.8%</td>
<td>13.8%</td>
<td>13.8%</td>
<td>13.8%</td>
<td>16.7%</td>
<td>16.7%</td>
<td>16.7%</td>
</tr>
<tr>
<td>By Labor Day</td>
<td>10.9%</td>
<td>10.9%</td>
<td>10.9%</td>
<td>10.9%</td>
<td>10.9%</td>
<td>10.9%</td>
<td>10.9%</td>
</tr>
<tr>
<td>By Thanksgiving or later</td>
<td>12.5%</td>
<td>12.5%</td>
<td>12.5%</td>
<td>12.5%</td>
<td>12.5%</td>
<td>12.5%</td>
<td>12.5%</td>
</tr>
<tr>
<td>Whenever is safe</td>
<td>20.0%</td>
<td>20.0%</td>
<td>20.0%</td>
<td>20.0%</td>
<td>20.0%</td>
<td>20.0%</td>
<td>20.0%</td>
</tr>
<tr>
<td>Not sure</td>
<td>5.0%</td>
<td>5.0%</td>
<td>5.0%</td>
<td>5.0%</td>
<td>5.0%</td>
<td>5.0%</td>
<td>5.0%</td>
</tr>
</tbody>
</table>

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*Regional, National, Global, Less than 100 employees, 101-250 employees, 251-1000 employees, 1000+ employees:*

- **Already fully open**: 59%, 72%, 45%, 16.9%, 16.9%, 16.9%, 11.1%
- **By mid-May**: 18.6%, 15.4%, 15.4%, 10.3%, 13.8%, 13.8%, 16.7%
- **By end of May**: 15.3%, 16.9%, 6.9%, 6.9%, 16.9%, 16.9%, 16.7%
- **By end of June**: 7.9%, 7.7%, 6.9%, 6.9%, 16.7%, 16.7%, 16.7%
- **By end of July**: 13.8%, 13.8%, 13.8%, 13.8%, 16.7%, 16.7%, 16.7%
- **By Labor Day**: 10.9%, 10.9%, 10.9%, 10.9%, 10.9%, 10.9%, 10.9%
- **By Thanksgiving or later**: 12.5%, 12.5%, 12.5%, 12.5%, 12.5%, 12.5%, 12.5%
- **Whenever is safe**: 20.0%, 20.0%, 20.0%, 20.0%, 20.0%, 20.0%, 20.0%
- **Not sure**: 5.0%, 5.0%, 5.0%, 5.0%, 5.0%, 5.0%, 5.0%
With 80%-86% of businesses expected to be fully open by the end of June, Indiana, Lawrence and Armstrong Counties are among the most confident in a fast recovery. On the other hand, only about 64% of businesses operating in Beaver, Washington and Westmoreland Counties are expecting to be open within the same timeframe. Businesses in Allegheny County are the least optimistic in their ability to quickly reopen.

When do you expect your business to FULLY reopen in the Southwestern PA region?

- 81% of businesses in Indiana expect to be fully open by the end of June.
- 73% of businesses in Lawrence expect to be fully open by the end of June.
- 71% of businesses in Armstrong expect to be fully open by the end of June.
- 71% of businesses in Beaver expect to be fully open by the end of June.
- 74% of businesses in Fayette expect to be fully open by the end of June.
- 74% of businesses in Greene expect to be fully open by the end of June.
- 86% of businesses in Indiana expect to be fully open by the end of July.
- 80% of businesses in Allegheny expect to be fully open by the end of July.
- 64% of businesses in Armstrong expect to be fully open by the end of July.
- 64% of businesses in Beaver expect to be fully open by the end of July.
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Construction, Healthcare, Logistics & Transportation, and Manufacturing businesses expect a significantly quicker reopening. Businesses in Education and Hospitality, Culture & Entertainment and Real Estate, as well as Government offices, are much less certain about their reopening horizon.

### When do you expect your business to FULLY reopen in Southwestern PA region?

<table>
<thead>
<tr>
<th>Industry</th>
<th>Already fully open</th>
<th>By mid-May</th>
<th>By end of May</th>
<th>By end of June</th>
<th>By end of July</th>
<th>By Labor Day</th>
<th>By Thanksgiving or later</th>
<th>Whenever is safe</th>
<th>Not sure</th>
</tr>
</thead>
<tbody>
<tr>
<td>Construction</td>
<td>5%</td>
<td>5%</td>
<td>5%</td>
<td>10%</td>
<td>24%</td>
<td>33%</td>
<td>75%</td>
<td>5%</td>
<td>14%</td>
</tr>
<tr>
<td>Education</td>
<td>5%</td>
<td>10%</td>
<td>30%</td>
<td>25%</td>
<td>33%</td>
<td>27%</td>
<td>67%</td>
<td>7%</td>
<td>6%</td>
</tr>
<tr>
<td>Energy*</td>
<td>10%</td>
<td>29%</td>
<td>33%</td>
<td>13%</td>
<td>11%</td>
<td>7%</td>
<td>100%</td>
<td>5%</td>
<td>19%</td>
</tr>
<tr>
<td>Financial Services</td>
<td>5%</td>
<td>10%</td>
<td>10%</td>
<td>5%</td>
<td>10%</td>
<td>20%</td>
<td>67%</td>
<td>67%</td>
<td>65%</td>
</tr>
<tr>
<td>Government</td>
<td>5%</td>
<td>1%</td>
<td>10%</td>
<td>1%</td>
<td>10%</td>
<td>10%</td>
<td>13%</td>
<td>7%</td>
<td>7%</td>
</tr>
<tr>
<td>Healthcare &amp; Social Assistance</td>
<td>10%</td>
<td>67%</td>
<td>74%</td>
<td>26%</td>
<td>25%</td>
<td>25%</td>
<td>100%</td>
<td>19%</td>
<td>19%</td>
</tr>
<tr>
<td>Hospitality, Culture &amp; Entertainment</td>
<td>32%</td>
<td>26%</td>
<td>21%</td>
<td>11%</td>
<td>7%</td>
<td>4%</td>
<td>25%</td>
<td>7%</td>
<td>7%</td>
</tr>
<tr>
<td>IT &amp; Tech</td>
<td>32%</td>
<td>11%</td>
<td>14%</td>
<td>25%</td>
<td>40%</td>
<td>19%</td>
<td>25%</td>
<td>13%</td>
<td>53%</td>
</tr>
<tr>
<td>Logistics &amp; Transportation*</td>
<td>29%</td>
<td>6%</td>
<td>25%</td>
<td>23%</td>
<td>25%</td>
<td>100%</td>
<td>100%</td>
<td>12%</td>
<td>58%</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>10%</td>
<td>5%</td>
<td>10%</td>
<td>10%</td>
<td>10%</td>
<td>81%</td>
<td>18%</td>
<td>18%</td>
<td>19%</td>
</tr>
<tr>
<td>Other</td>
<td>5%</td>
<td>5%</td>
<td>10%</td>
<td>19%</td>
<td>21%</td>
<td>12%</td>
<td>21%</td>
<td>55%</td>
<td>6%</td>
</tr>
<tr>
<td>Professional Services</td>
<td>5%</td>
<td>5%</td>
<td>20%</td>
<td>20%</td>
<td>19%</td>
<td>12%</td>
<td>27%</td>
<td>13%</td>
<td>6%</td>
</tr>
<tr>
<td>Real Estate</td>
<td>13%</td>
<td>13%</td>
<td>12%</td>
<td>19%</td>
<td>27%</td>
<td>9%</td>
<td>5%</td>
<td>20%</td>
<td>41%</td>
</tr>
<tr>
<td>Retail</td>
<td>6%</td>
<td>6%</td>
<td>6%</td>
<td>7%</td>
<td>4%</td>
<td>4%</td>
<td>6%</td>
<td>7%</td>
<td>6%</td>
</tr>
</tbody>
</table>

* Small sample size, results may not be representative.
Smaller and regional firms are more confident in a fast recovery; 44% of the regional and 45-46% of those with less than 250 employees believe they will see pre-crisis output within the next 6 months. Firms with more than 1,000 employees are more likely to predict longer recovery (12+ months) and midsized firms are the most uncertain about the timeframe of their recovery.
Businesses in **Financial Services, IT & Tech, Retail, and Real Estate** are the most optimistic about returning to pre-crisis output within 6 months. Firms in **Hospitality, Culture & Entertainment, Education, and Energy** are among the least certain about the timing of their recovery.

![Bar chart showing the percentage of firms in various industries anticipating different time frames for output recovery.](chart.png)

*Small sample size, results may not be representative.*
Businesses are considering **multiple factors** in their decision-making about reopening. **Top 3 triggers** include the lifting of stay-at-home orders, preparedness of employees to behave safely in the workplace, and clear guidance from policy makers. National and regional firms and companies with larger workforces are factoring in **availability of PPEs and sanitation supplies**.

### What specific "triggers" will influence the decision for your business' reopening?

<table>
<thead>
<tr>
<th>Trigger</th>
<th>All Firms</th>
<th>Regional</th>
<th>National</th>
<th>Global</th>
<th>Less than 100 employees</th>
<th>101-250 employees</th>
<th>251-1000 employees</th>
<th>1000+ employees</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lifting of the statewide stay-at-home order</td>
<td>73.6%</td>
<td>71.4%</td>
<td>71.4%</td>
<td>74.9%</td>
<td>91.7%</td>
<td>91.7%</td>
<td>91.7%</td>
<td>90.0%</td>
</tr>
<tr>
<td>Clear guidance from policy makers on workplace safety requirements</td>
<td>54.3%</td>
<td>53.8%</td>
<td>53.6%</td>
<td>52.5%</td>
<td>48.3%</td>
<td>53.8%</td>
<td>56.8%</td>
<td>54.4%</td>
</tr>
<tr>
<td>Employees having the information and ability needed to follow proper health safety protocols in the workplace</td>
<td>52.9%</td>
<td>53.7%</td>
<td>55.0%</td>
<td>52.4%</td>
<td>53.7%</td>
<td>51.5%</td>
<td>50.0%</td>
<td>49.0%</td>
</tr>
<tr>
<td>Broad availability of personal protective equipment and sanitizing supplies</td>
<td>22.3%</td>
<td>23.1%</td>
<td>23.8%</td>
<td>24.8%</td>
<td>25.0%</td>
<td>23.8%</td>
<td>25.0%</td>
<td>25.0%</td>
</tr>
<tr>
<td>Long-term downward trend in cases</td>
<td>35.8%</td>
<td>35.8%</td>
<td>35.8%</td>
<td>35.8%</td>
<td>35.8%</td>
<td>35.8%</td>
<td>35.8%</td>
<td>35.8%</td>
</tr>
<tr>
<td>Sufficient population has been tested</td>
<td>29.8%</td>
<td>29.4%</td>
<td>30.0%</td>
<td>29.6%</td>
<td>30.0%</td>
<td>29.6%</td>
<td>30.0%</td>
<td>30.0%</td>
</tr>
<tr>
<td>Vaccine or viable therapeutic solution available</td>
<td>19.0%</td>
<td>19.8%</td>
<td>19.0%</td>
<td>19.6%</td>
<td>20.7%</td>
<td>19.8%</td>
<td>19.6%</td>
<td>18.7%</td>
</tr>
</tbody>
</table>

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The **top triggers** playing a role in decision-making about reopening somewhat differ among counties. Long-term **downward trend in COVID-19 cases** are a stronger factor for businesses in Armstrong, Indiana, Washington, and Greene. Businesses in Lawrence and Fayette are factoring in more strongly **availability of PPEs and sanitation supplies**.

What specific "triggers" will influence the decision for your business' reopening?

- **Lifting of the statewide stay-at-home order**
- **Clear guidance from policy makers on workplace safety requirements**
- **Employees having the information and ability needed to follow proper health safety protocols in the workplace**
- **Broad availability of personal protective equipment and sanitizing supplies**
- **Long-term downward trend in cases**
- **Sufficient population has been tested**
- **Vaccine or viable therapeutic solution available**

[Bar chart showing percentages for different counties and triggers]
The **top triggers** playing a role in decision-making about reopening differ by industries. Availability of **PPE and sanitizing supplies** is a stronger factor for **Education, Government, & Healthcare**. Long-term **downward trend in COVID-19 cases** and **sufficient testing** are a stronger factor for businesses in **IT & Tech**.

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**What specific "triggers" will influence the decision for your business’ reopening?**

<table>
<thead>
<tr>
<th>Trigger</th>
<th>Construction</th>
<th>Education</th>
<th>Energy</th>
<th>Financial Services</th>
<th>Government</th>
<th>Healthcare &amp; Social Assistance</th>
<th>Hospitality, Culture &amp; Entertainment</th>
<th>IT &amp; Tech</th>
<th>Logistics &amp; Transportation</th>
<th>Manufacturing</th>
<th>Other</th>
<th>Professional Services</th>
<th>Real Estate</th>
<th>Retail</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lifting of the statewide stay-at-home order</td>
<td>85%</td>
<td>88%</td>
<td>89%</td>
<td>82%</td>
<td>80%</td>
<td>73%</td>
<td>75%</td>
<td>71%</td>
<td>78%</td>
<td>78%</td>
<td>82%</td>
<td>80%</td>
<td>85%</td>
<td>95%</td>
</tr>
<tr>
<td>Clear guidance from policy makers on workplace safety requirements</td>
<td>25%</td>
<td>35%</td>
<td>56%</td>
<td>60%</td>
<td>65%</td>
<td>54%</td>
<td>60%</td>
<td>56%</td>
<td>54%</td>
<td>60%</td>
<td>67%</td>
<td>56%</td>
<td>22%</td>
<td>56%</td>
</tr>
<tr>
<td>Employees having the information and ability needed to follow proper health safety protocols in the workplace</td>
<td>25%</td>
<td>33%</td>
<td>50%</td>
<td>47%</td>
<td>50%</td>
<td>43%</td>
<td>47%</td>
<td>42%</td>
<td>41%</td>
<td>39%</td>
<td>40%</td>
<td>47%</td>
<td>47%</td>
<td>33%</td>
</tr>
<tr>
<td>Broad availability of personal protective equipment and sanitizing supplies</td>
<td>0%</td>
<td>33%</td>
<td>33%</td>
<td>47%</td>
<td>40%</td>
<td>37%</td>
<td>41%</td>
<td>39%</td>
<td>30%</td>
<td>39%</td>
<td>44%</td>
<td>43%</td>
<td>34%</td>
<td>47%</td>
</tr>
<tr>
<td>Long-term downward trend in cases</td>
<td>35%</td>
<td>33%</td>
<td>47%</td>
<td>47%</td>
<td>40%</td>
<td>33%</td>
<td>33%</td>
<td>33%</td>
<td>33%</td>
<td>33%</td>
<td>33%</td>
<td>33%</td>
<td>33%</td>
<td>33%</td>
</tr>
<tr>
<td>Sufficient population has been tested</td>
<td>35%</td>
<td>33%</td>
<td>47%</td>
<td>47%</td>
<td>40%</td>
<td>33%</td>
<td>33%</td>
<td>33%</td>
<td>33%</td>
<td>33%</td>
<td>33%</td>
<td>33%</td>
<td>33%</td>
<td>33%</td>
</tr>
<tr>
<td>Vaccine or viable therapeutic solution available</td>
<td>0%</td>
<td>15%</td>
<td>0%</td>
<td>0%</td>
<td>16%</td>
<td>10%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
</tr>
</tbody>
</table>

*Small sample size in Energy & Transportation and Logistics is small*, results may not be representative.
Businesses are actively preparing for reopening. **Top 3 efforts** include developing policies and procedures, procuring PPEs, and securing proper sanitation services. Firms with a larger footprint and workforce are more likely to pursue additional strategies including restructuring physical spaces and staffing to accommodate social distancing requirements.

---

**What measures has your firm been taking to prepare your business for reopening?**

![Chart showing the percentage of firms taking various measures for business reopening](chart)

- **Developing policies and procedures to prevent the virus spread in the workplace**
  - All Firms: 74.1%
  - Regional: 73.1%
  - National: 74.4%
  - Global: 91.7%
  - Less than 100 employees: 95.0%
  - 101-250 employees: 100.0%
  - 251-1000 employees: 95.0%
  - 1000+ employees: 100.0%

- **Procuring masks and other protective equipment**
  - All Firms: 71.2%
  - Regional: 70.2%
  - National: 72.4%
  - Global: 82.6%
  - Less than 100 employees: 65.3%
  - 101-250 employees: 100.0%
  - 251-1000 employees: 100.0%
  - 1000+ employees: 100.0%

- **Procuring necessary supplies/services to ensure effective workplace sanitation**
  - All Firms: 66.5%
  - Regional: 64.5%
  - National: 71.8%
  - Global: 72.4%
  - Less than 100 employees: 60.3%
  - 101-250 employees: 87.5%
  - 251-1000 employees: 80.0%
  - 1000+ employees: 94.6%

- **Restructuring physical space to accommodate social distancing in the workplace**
  - All Firms: 46.6%
  - Regional: 43.0%
  - National: 46.2%
  - Global: 60.9%
  - Less than 100 employees: 48.0%
  - 101-250 employees: 72.4%
  - 251-1000 employees: 72.4%
  - 1000+ employees: 72.4%

- **Restructuring staffing to better protect employees**
  - All Firms: 46.6%
  - Regional: 49.0%
  - National: 42.6%
  - Global: 42.6%
  - Less than 100 employees: 39.9%
  - 101-250 employees: 70.0%
  - 251-1000 employees: 70.0%
  - 1000+ employees: 83.3%

- **Restructuring the entire business model to account for broader aspects of COVID-19 impact**
  - All Firms: 23.6%
  - Regional: 25.0%
  - National: 22.6%
  - Global: 21.1%
  - Less than 100 employees: 37.9%
  - 101-250 employees: 37.9%
  - 251-1000 employees: 38.9%
  - 1000+ employees: 38.9%
The efforts to prepare for reopening differ by counties. Firms in **Armstrong** are most active in all the efforts. Firms in **Butler** and **Indiana** are more actively procuring **PPEs** and **sanitizing supplies**. Firms in **Indiana** and **Washington** are also more likely to including **restructuring** of workplaces, staffing and business models to prevent the spreading of the virus in their facilities.

### What measures has your firm been taking to prepare your business for reopening?

<table>
<thead>
<tr>
<th>Measure</th>
<th>Allegheny</th>
<th>Armstrong</th>
<th>Beaver</th>
<th>Butler</th>
<th>Fayette</th>
<th>Greene</th>
<th>Indiana</th>
<th>Lawrence</th>
<th>Washington</th>
<th>Westmoreland</th>
</tr>
</thead>
<tbody>
<tr>
<td>Developing policies and procedures to prevent the virus spread in the workplace</td>
<td>77%</td>
<td>80%</td>
<td>77%</td>
<td>83%</td>
<td>96%</td>
<td>72%</td>
<td>66%</td>
<td>48%</td>
<td>49%</td>
<td>35%</td>
</tr>
<tr>
<td>Procuring masks and other protective equipment</td>
<td>77%</td>
<td>80%</td>
<td>77%</td>
<td>83%</td>
<td>96%</td>
<td>72%</td>
<td>66%</td>
<td>48%</td>
<td>49%</td>
<td>35%</td>
</tr>
<tr>
<td>Procuring necessary supplies/services to ensure effective workplace sanitation</td>
<td>92%</td>
<td>88%</td>
<td>86%</td>
<td>86%</td>
<td>92%</td>
<td>86%</td>
<td>83%</td>
<td>79%</td>
<td>75%</td>
<td>57%</td>
</tr>
<tr>
<td>Restructuring physical space to accommodate social distancing in the workplace</td>
<td>69%</td>
<td>64%</td>
<td>61%</td>
<td>59%</td>
<td>77%</td>
<td>74%</td>
<td>77%</td>
<td>75%</td>
<td>60%</td>
<td>54%</td>
</tr>
<tr>
<td>Restructuring staffing to better protect employees</td>
<td>85%</td>
<td>85%</td>
<td>85%</td>
<td>86%</td>
<td>85%</td>
<td>85%</td>
<td>85%</td>
<td>85%</td>
<td>85%</td>
<td>85%</td>
</tr>
<tr>
<td>Restructuring the entire business model to account for broader aspects of COVID-19 impact</td>
<td>92%</td>
<td>88%</td>
<td>86%</td>
<td>86%</td>
<td>92%</td>
<td>86%</td>
<td>83%</td>
<td>79%</td>
<td>75%</td>
<td>57%</td>
</tr>
</tbody>
</table>

12
Businesses in Hospitality, Retail, and Government are the least likely to focus on developing policies and procedures for reopening. Firms in Construction, Energy, Logistics & Transportation, and Manufacturing are the most active in procuring PPE and securing proper sanitation services. Firms in IT & Tech are the most likely to restructure the entire business model.

What measures has your firm been taking to prepare your business for reopening?

- Developing policies and procedures to prevent the virus spread in the workplace
- Procuring masks and other protective equipment
- Procuring necessary supplies/services to ensure effective workplace sanitation
- Restructuring physical space to accommodate social distancing in the workplace
- Restructuring staffing to better protect employees
- Restructuring the entire business model to account for broader aspects of COVID-19 impact

* Small sample size in Energy & Transportation and Logistics is small; results may not be representative.
Businesses, particularly smaller and regional firms, do not feel well-equipped to handle all the practicalities of stipulated conditions for reopening. While most businesses are relatively highly confident in their ability to turn new regulations into effective internal policies and procedures and to continue to comply with telecommuting requirements where possible, only about half of firms feel confident in their ability to recall laid off employees, ensure hospital-level sanitation and perform employee health screening.

What is your firm’s confidence level with the listed aspects of business preparedness for reopening?

Values denote the cumulative share of businesses that are “very confident” or “somewhat confident” in their ability to handle each task.
Across the 10-county region, businesses in **Greene** and **Indiana** are the least confident they will be able to recall laid off employees who may be temporarily better off with supplemental unemployment payments. Firms in **Lawrence, Allegheny**, and **Westmoreland** are the least confident in their ability to perform **hospital-level sanitation** in the workplace. Businesses in **Fayette** are the least confident in their ability to continue **telecommuting** practices.

**What is your firm’s confidence level with the listed aspects of business preparedness for reopening?**

*Values denote the cumulative share of businesses that are “very confident” or “somewhat confident” in their ability to handle each task.*

<table>
<thead>
<tr>
<th>Aspect</th>
<th>Allegheny</th>
<th>Armstrong</th>
<th>Beaver</th>
<th>Butler</th>
<th>Fayette</th>
<th>Greene</th>
<th>Indiana</th>
<th>Lawrence</th>
<th>Washington</th>
<th>Westmoreland</th>
</tr>
</thead>
<tbody>
<tr>
<td>Having the ability to effectively process and quickly operationalize regulations and guidance from public officials as it becomes available</td>
<td>78%</td>
<td>92%</td>
<td>82%</td>
<td>81%</td>
<td>80%</td>
<td>82%</td>
<td>85%</td>
<td>85%</td>
<td>95%</td>
<td>95%</td>
</tr>
<tr>
<td>Complying with the requirement to continue telecommute to the greatest extent possible</td>
<td>79%</td>
<td>85%</td>
<td>76%</td>
<td>81%</td>
<td>81%</td>
<td>85%</td>
<td>95%</td>
<td>7%</td>
<td>85%</td>
<td>79%</td>
</tr>
<tr>
<td>Having the ability to recall laid off or furloughed staff who may be reluctant to come back for health concerns (ensure their protection)</td>
<td>60%</td>
<td>58%</td>
<td>56%</td>
<td>56%</td>
<td>51%</td>
<td>59%</td>
<td>55%</td>
<td>52%</td>
<td>57%</td>
<td>71%</td>
</tr>
<tr>
<td>Having the ability and comfort level to perform pre-return and ongoing employee health and health safety screening</td>
<td>51%</td>
<td>64%</td>
<td>58%</td>
<td>64%</td>
<td>59%</td>
<td>64%</td>
<td>59%</td>
<td>52%</td>
<td>64%</td>
<td>65%</td>
</tr>
<tr>
<td>Having the capacity to perform or ensure hospital-level sanitation in the workplace</td>
<td>51%</td>
<td>54%</td>
<td>56%</td>
<td>58%</td>
<td>58%</td>
<td>67%</td>
<td>59%</td>
<td>64%</td>
<td>57%</td>
<td>64%</td>
</tr>
<tr>
<td>Having the ability to recall laid off or furloughed staff who may be reluctant to come back for economic reasons (being temporarily better off with supplemental unemployment payment)</td>
<td>51%</td>
<td>54%</td>
<td>56%</td>
<td>58%</td>
<td>58%</td>
<td>67%</td>
<td>59%</td>
<td>64%</td>
<td>57%</td>
<td>64%</td>
</tr>
</tbody>
</table>
Firms in **Hospitality, Retail** and **Construction** have the lowest level of confidence **recalling furloughed staff**. Firms in **Education, Manufacturing** and **Construction** have the least confidence in their capacity to perform hospital-level sanitation in the workplace.

**What is your firm’s confidence level with the listed aspects of business preparedness for reopening?**

*Values denote the cumulative share of businesses that are “very confident” or “somewhat confident” in their ability to handle each task.*

* Small sample size in Energy & Transportation and Logistics is small; results may not be representative.
The employers’ needs for technical assistance toward their ability to reopen cover a number of categories and differ greatly by their size and footprint. The highest shared need is in a better understanding of PA’s reopening strategy and protocols. Smaller and regional employers also need help in accessing PPEs and sanitation supplies, developing protocols for employee health screening, and motivating employees to return to workplaces. Other assistance needed is in developing and implementing industry-specific approaches to ensure a safe reopening.

What technical assistance would be the most beneficial to your firm to get ready for reopening?

- Better understanding of PA’s reopening strategy and protocols for business reopening
- Availability of PPE and supplies
- Information on developing effective policies and procedures for my business/industry
- Help in developing specific protocol for pre-return employee health and health safety screening
- Resources to procure necessary PPE and supplies
- Help with developing tools for reassuring or motivating employees to return to the workplace
- Customized technical assistance to develop and implement effective policies and procedures for my business/industry
- Help with rehiring and/or training workforce

The graph shows the percentage of firms in different categories (All Firms, Regional, National, Global, Less than 100 employees, 101-250 employees, 251-1000 employees, 1000+ employees) that would benefit most from each type of technical assistance.
Businesses located in Allegheny, Greene, and Westmoreland are interested the most in various forms of technical assistance. In addition to the top 3 shared priorities, firms in Allegheny, Armstrong, and Indiana are more interested in protocols for employee screening, and in Indiana are in more need of having tools for recalling employees back to work. Help with rehiring employees is more needed in Armstrong, Greene, and Washington.

What technical assistance would be the most beneficial to your firm to get ready for reopening?

- Better understanding of PA’s reopening strategy and protocols for business reopening
- Availability of PPE and supplies
- Information on developing effective policies and procedures for my business/industry
- Help in developing specific protocol for pre-return employee health and health safety screening
- Resources to procure necessary PPE and supplies
- Help with developing tools for reassuring or motivating employees to return to the workplace
- Customized technical assistance to develop and implement effective policies and procedures for my business/industry
- Help with rehiring and/or training workforce
Businesses in **Construction, Education, Healthcare & Social Assistance, and Transportation & Logistics** are in most need of various aspects of technical assistance while firms in **Manufacturing, Retail, and Real Estate** are less likely to need technical assistance in preparation for reopening. Firms in **Construction, Education, Energy, and Hospitality** are more likely to need the most help in recalling, rehiring and retraining workforce.

**What technical assistance would be the most beneficial to your firm to get ready for reopening?**

*Small sample size in Energy & Transportation and Logistics is small; results may not be representative.*
Close to 90% of businesses have taken some measures to adjust to the disruptions caused by the pandemic. On average, 57% of firms applied for new forms of financing, 37% delayed or canceled capital expenditures and increased cash reserves, and 26% have temporarily ceased operation. Close to 30% have decreased staffing in some ways. Regional and smaller businesses were more likely to apply for new forms of financing while global and larger businesses were more likely to increase savings and cut planned capex. The largest companies were much more likely to lay off workers.

What measures has your firm taken to adjust to COVID-19 related disruptions?

- Applied for new forms of financing
- Delayed or cancelled planned capital expenditures
- Increased precautionary saving and cash reserves
- Reduced employee hours and/or operating hours of stores or facilities
- Laid off workers temporarily
- Ceased operations temporarily
- Increased use of existing credit line(s)
- Delayed or renegotiated payments to suppliers or landlords
- Furloughed workers (paid or unpaid, with workers retaining access to most benefits)
- Cut employee pay
- Laid off workers permanently
- Ceased operations permanently
- None of these
Businesses in Westmoreland, Allegheny, and Fayette were the most likely and firms in Lawrence and Indiana were the least likely to take any of the listed measures. Firms in Armstrong, Beaver, Washington, and Indiana were the most likely to use different measures to reduce staffing. Firms in Washington, Beaver, and Butler were the most likely to delay or cancel planned capital expenditures. Firms in Greene and Fayette were most likely to temporarily cease operations.

What measures has your firm taken to adjust to COVID-19 related disruptions?

- Applied for new forms of financing
- Delayed or cancelled planned capital expenditures
- Increased precautionary saving and cash reserves
- Reduced employee hours and/or operating hours of stores or facilities
- Laid off workers temporarily
- Ceased operations temporarily
- Increased use of existing credit line(s)
- Delayed or renegotiated payments to suppliers or landlords
- Furloughed workers (paid or unpaid, with workers retaining access to most benefits)
- Cut employee pay
- Laid off workers permanently
- Ceased operations permanently
- None of these
COVID-19 related interventions varied significantly among the industry sectors. Businesses in Retail, Healthcare, Professional Services, and Construction were more likely to apply for new forms of financing. Firms in Construction, Hospitality, Retail, and Manufacturing were the most likely to use different measures to reduce staffing. Businesses in IT & Tech, Government, and Real Estate were the least likely to take any of the listed measures.

What measures has your firm taken to adjust to COVID-19 related disruptions?

* Small sample size in Energy & Transportation and Logistics is small, results may not be representative.
Close to 77% of all firms have sought additional financing but only 46% were able to secure it (so far). The greatest share of unsuccessful seekers of additional financing was among regional firms (36%) and businesses with less than 100 employees (40%). Businesses with 101-250 employees were the most successful in securing additional financing (over 65%).

Has your firm been able to access additional financing to address any cash flow interruptions you may be facing?

- We sought access to additional financing and were able to secure it
- We sought access to additional financing but were unable to secure it
- We have not needed to seek additional financing

<table>
<thead>
<tr>
<th>Category</th>
<th>All Firm</th>
<th>Regional</th>
<th>National</th>
<th>Global</th>
<th>Less than 100 employees</th>
<th>101-250 employees</th>
<th>251-1000 employees</th>
<th>1000+ employees</th>
</tr>
</thead>
<tbody>
<tr>
<td>We sought access to</td>
<td>30.6%</td>
<td>35.3%</td>
<td>13.9%</td>
<td>48.3%</td>
<td>35.9%</td>
<td>34.8%</td>
<td>40.0%</td>
<td>52.9%</td>
</tr>
<tr>
<td>additional financing and</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>were able to secure it</td>
<td>46.1%</td>
<td>44.4%</td>
<td>63.9%</td>
<td>13.8%</td>
<td>45.1%</td>
<td>65.2%</td>
<td>45.0%</td>
<td>47.1%</td>
</tr>
<tr>
<td>We sought access to</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>additional financing but</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>were unable to secure it</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>We have not needed to</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>seek additional financing</td>
<td>23.2%</td>
<td>20.3%</td>
<td>22.2%</td>
<td>19.0%</td>
<td>15.0%</td>
<td>4.0%</td>
<td>47.1%</td>
<td></td>
</tr>
</tbody>
</table>
Firms in Armstrong, Beaver, and Indiana were less likely to seek out additional financing while firms in Westmoreland, Fayette, and Allegheny were most active in seeking additional financing. However, businesses in Fayette along with businesses in Greene were the least successful in securing it. Firms in Westmoreland were the most successful in securing additional financing.

Has your firm been able to access additional financing to address any cash flow interruptions you may be facing?

- We sought access to additional financing and were able to secure it
- We sought access to additional financing but were unable to secure it
- We have not needed to seek additional financing

<table>
<thead>
<tr>
<th></th>
<th>Allegheny</th>
<th>Armstrong</th>
<th>Beaver</th>
<th>Butler</th>
<th>Fayette</th>
<th>Greene</th>
<th>Indiana</th>
<th>Lawrence</th>
<th>Washington</th>
<th>Westmoreland</th>
</tr>
</thead>
<tbody>
<tr>
<td>We sought access to additional financing and were able to secure it</td>
<td>25%</td>
<td>40%</td>
<td>38%</td>
<td>31%</td>
<td>25%</td>
<td>33%</td>
<td>38%</td>
<td>30%</td>
<td>32%</td>
<td>20%</td>
</tr>
<tr>
<td>We sought access to additional financing but were unable to secure it</td>
<td>27%</td>
<td>12%</td>
<td>23%</td>
<td>27%</td>
<td>32%</td>
<td>30%</td>
<td>19%</td>
<td>23%</td>
<td>23%</td>
<td>25%</td>
</tr>
<tr>
<td>We have not needed to seek additional financing</td>
<td>48%</td>
<td>48%</td>
<td>40%</td>
<td>42%</td>
<td>44%</td>
<td>36%</td>
<td>43%</td>
<td>47%</td>
<td>45%</td>
<td>55%</td>
</tr>
</tbody>
</table>
Construction, Financial Services, Government, IT & Tech, and Real Estate companies were least likely to seek out additional financing. Healthcare, Hospitality, Logistics & Transportation, and Retail companies are the most likely to have problems securing additional financing.

Has your firm been able to access additional financing to address any cash flow interruptions you may be facing?

<table>
<thead>
<tr>
<th>Industry</th>
<th>We sought access to additional financing and were able to secure it</th>
<th>We sought access to additional financing but were unable to secure it</th>
<th>We have not needed to seek additional financing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Construction</td>
<td>17%</td>
<td>30%</td>
<td>0%</td>
</tr>
<tr>
<td>Education</td>
<td>22%</td>
<td>46%</td>
<td>100%</td>
</tr>
<tr>
<td>Energy*</td>
<td>61%</td>
<td>54%</td>
<td>33%</td>
</tr>
<tr>
<td>Financial Services</td>
<td>11%</td>
<td>56%</td>
<td>37%</td>
</tr>
<tr>
<td>Government</td>
<td>5%</td>
<td>7%</td>
<td>46%</td>
</tr>
<tr>
<td>Healthcare &amp; Social Assistance</td>
<td>7%</td>
<td>44%</td>
<td>58%</td>
</tr>
<tr>
<td>Hospitality, Culture &amp; Entertainment</td>
<td>20%</td>
<td>40%</td>
<td>20%</td>
</tr>
<tr>
<td>IT &amp; Tech</td>
<td>25%</td>
<td>32%</td>
<td>32%</td>
</tr>
<tr>
<td>Logistics &amp; Transportation*</td>
<td>32%</td>
<td>16%</td>
<td>31%</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>16%</td>
<td>32%</td>
<td>32%</td>
</tr>
<tr>
<td>Other</td>
<td>16%</td>
<td>26%</td>
<td>16%</td>
</tr>
<tr>
<td>Professional Services</td>
<td>31%</td>
<td>43%</td>
<td>50%</td>
</tr>
<tr>
<td>Real Estate</td>
<td>52%</td>
<td>21%</td>
<td>21%</td>
</tr>
<tr>
<td>Retail</td>
<td>42%</td>
<td>36%</td>
<td>36%</td>
</tr>
</tbody>
</table>

* Small sample size, results may not be representative.
Consumer Confidence

- Online survey; disseminated in 3 waves (bi-weekly) between March 24 and April 23 in collaboration with Schmidt Market Research

- ~2,500 respondents (residents of SWPA)

<table>
<thead>
<tr>
<th>Gender</th>
<th>Household Income</th>
<th>Home Ownership</th>
<th>Level of Education</th>
<th>Employment Status</th>
<th>Political Affiliation</th>
<th>Children in the House</th>
</tr>
</thead>
<tbody>
<tr>
<td>60%</td>
<td>$20K-$49K</td>
<td>54% (owns)</td>
<td>55%</td>
<td>53% (full-time)</td>
<td>43% (Democrat)</td>
<td>48% (under age 17)</td>
</tr>
<tr>
<td>40%</td>
<td>$50K-$74K</td>
<td></td>
<td></td>
<td></td>
<td>19% (Republican)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>$75K-$99K</td>
<td></td>
<td></td>
<td></td>
<td>12% (Independent)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>$100K-$124K</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>$125K-$149K</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>$150K+</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

(Percentages are approximate)
Overall sentiment among the region’s residents toward the **national and regional economy** continues to **decline**. However, sentiment on **employment prospects**, **personal finances** and **spending ability** has held relatively **steady**.
Younger generations of respondents are feeling more significantly negative about the national economy compared to older generations. However, across all age groups, respondents are generally more positive about the regional economy than the national economy.
Despite current declines in consumer sentiment in most of the measured metrics, the outlook is more optimistic in case of personal finances and spending plans even improving.
With the progression of the pandemic, regional consumers are less likely to see themselves at a sports game or concert in the next few months. Other spending plans have remained relatively stable since the pandemic began.
Most respondents believe the Pittsburgh economy will not fully reopen until sometime in the summer, most think between June and August. A majority (60%) also believe beginning to reopen starting May 8th is too soon. Only 12% think it is not soon enough.
A majority of respondents want to see as many safety measures as possible implemented before returning to work and reopening of the economy. Long-term **downward trend** in new cases and a **vaccine** are among the most frequently mentioned **triggers of personal comfort**.

“What specific "triggers" would make you most comfortable returning to work / businesses reopening?

- Long-term downward trend in cases: 77%
- Vaccine: 69%
- Therapeutic (non-vaccine but effective treatment): 65%
- Sufficient population has been tested: 65%
- None of these are necessary to reopening the regional economy: 10%
Sanitizer, frequent deep cleaning, wearing masks, social distancing, and sick leave flexibility are among the top “must haves”. On-site or off-site screenings are “nice to have” by about half of respondents.

<table>
<thead>
<tr>
<th>What Employees Want at Work Post-COVID-19</th>
<th>Must have</th>
<th>Nice to have</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sanitizer available</td>
<td>83%</td>
<td>12%</td>
</tr>
<tr>
<td>Frequent office deep cleaning</td>
<td>74%</td>
<td>19%</td>
</tr>
<tr>
<td>Employees wear masks</td>
<td>54%</td>
<td>11%</td>
</tr>
<tr>
<td>Social distancing</td>
<td>53%</td>
<td>21%</td>
</tr>
<tr>
<td>Sick leave flexibility</td>
<td>51%</td>
<td>38%</td>
</tr>
<tr>
<td>&quot;Shifts&quot; so office not full</td>
<td>38%</td>
<td>33%</td>
</tr>
<tr>
<td>On-site screening provided</td>
<td>27%</td>
<td>42%</td>
</tr>
<tr>
<td>Employees wear gloves</td>
<td>25%</td>
<td>21%</td>
</tr>
<tr>
<td>Off-site screening paid for</td>
<td>22%</td>
<td>45%</td>
</tr>
</tbody>
</table>
In general, grocery shoppers and general retail shoppers expect similar safety measures, with some slightly stronger precautions expected from grocery stores.

<table>
<thead>
<tr>
<th>Safety Measure</th>
<th>Grocery</th>
<th>General Retail</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sanitizer spray/wipes available</td>
<td>89%</td>
<td>85%</td>
</tr>
<tr>
<td>Carts/baskets disinfected every use</td>
<td></td>
<td>86%</td>
</tr>
<tr>
<td>Employees must wear masks</td>
<td>79%</td>
<td>79%</td>
</tr>
<tr>
<td>Social distancing encouraged</td>
<td>79%</td>
<td>79%</td>
</tr>
<tr>
<td>Customers must wear masks</td>
<td></td>
<td>70%</td>
</tr>
<tr>
<td>Limited number of people inside</td>
<td>62%</td>
<td>64%</td>
</tr>
<tr>
<td>Employees must wear gloves</td>
<td>44%</td>
<td>51%</td>
</tr>
<tr>
<td>One-way aisles</td>
<td>39%</td>
<td>32%</td>
</tr>
<tr>
<td>None of these are necessary</td>
<td>4%</td>
<td>5%</td>
</tr>
</tbody>
</table>

What Customers Expect to Feel Safe When Shopping (as we progress to the “yellow & green phases”)
Consumers feel generally the \textbf{same} about safety measure for \textbf{dining out} as they do for \textbf{general shopping}. However, they are \textbf{less likely to expect others wearing masks} when dining out.

\textbf{What Customers Expect to Feel Safe When Dining (as we progress to the “yellow & green phases”)}

- Seating spaced out: 82%
- Sanitizer spray/wipes available: 80%
- Seats cleaned for every customer: 80%
- Social distancing encouraged: 75%
- Limited number of people inside: 71%
- Employees must wear masks: 67%
- No cash/touchless payment: 58%
- Employees must wear gloves: 55%
- Customers must wear masks: 28%
- None of these are necessary: 5%
Consumers feel generally the same about safety measure for events as they do for dining but are much more likely to expect that others wear masks. There is minimal difference between safety measures expected at outdoor events versus indoor events.

What Customers Expect to Feel Safe when Attending Events (as we progress to the “yellow & green phases”)

- Seating space out
- Sanitizer spray/wipes available
- Social distancing
- Seating cleaned after every customer
- Limited number of people "inside"
- Employees wear masks
- Customers wear masks
- No cash / touchless pay
- Employees wear gloves
- None of these are necessary

Consumers feel generally the same about safety measure for events as they do for dining but are much more likely to expect that others wear masks. There is minimal difference between safety measures expected at outdoor events versus indoor events.