Response + Recovery
The Allegheny Conference COVID-19 Webinar Series

TODAY:
“Building Confidence in a Responsible Reopening of the Region’s Economy”
Program

• Welcome

• Presentations

• Panel Discussion

• Q&A Session

• Wrap-Up

Welcome:
Vera Krekanova
Chief Strategy and Research Officer
Allegheny Conference

Presenters:
Mekael Teshome
Vice President and Senior Regional Officer
Federal Reserve Bank of Cleveland

Kate Murphy
President and Lead Strategist
Campos

Kevin Srigley
President
Schmidt Market Research
Welcome

Vera Krekanova
Allegheny Conference on Community Development
Mekael Teshome
Federal Reserve Bank of Cleveland
“How Yinz Doin’?”
Key Findings from Wave 2
Prepared for Allegheny Conference on Community Development
ABOUT THE SURVEY

• Objective: To understand the impact COVID-19 is having on the life of Pittsburghers
• Wave 1 fielded April 3-6
• Wave 2 fielded May 6-11
• Includes more than 1,500 respondents from Allegheny County; margin of error is 2.5% for both waves
• In both waves, respondents are representative of the estimated Allegheny County population by a number of demographic measures, including age, gender, ethnicity, household income, and political party affiliation
• Sample sourced from Campos’s proprietary, opt-in research panel of people in the Western Pennsylvania region

ABOUT CAMPOS

Campos is a research-driven customer experience and brand planning firm headquartered in Pittsburgh. For more than 35 years, we’ve provided organizations the research and insight they need for strategic decision-making. We make it easy for organizations to develop compelling customer experiences and authentic brands that resonate with customers.
THE VAST MAJORITY OF PITTSBURGHERS ARE AT LEAST SOMEWHAT CONCERNED ABOUT THE CORONAVIRUS

<table>
<thead>
<tr>
<th>Question: How concerned are you about the coronavirus’ impact on your household?</th>
</tr>
</thead>
<tbody>
<tr>
<td>All Respondents</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>Not at all or not so concerned</th>
<th>Somewhat concerned</th>
<th>Extremely or very concerned</th>
</tr>
</thead>
<tbody>
<tr>
<td>All Respondents n=1,520</td>
<td>26%</td>
<td>41%</td>
<td>34%</td>
</tr>
</tbody>
</table>

Wave 2
HOWEVER, OVERALL CONCERN HAS DECREASED FROM SINCE WAVE 1.
“WORRY” IS THE MOST PREVALENT EMOTION PITTSBURGHERS FEEL, FOLLOWED BY “RESTLESSNESS”

<table>
<thead>
<tr>
<th>Emotion</th>
<th>Respondents (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Worry</td>
<td>31%</td>
</tr>
<tr>
<td>Restlessness</td>
<td>26%</td>
</tr>
<tr>
<td>Hope</td>
<td>14%</td>
</tr>
<tr>
<td>Gratitude</td>
<td>14%</td>
</tr>
<tr>
<td>Distrust</td>
<td>13%</td>
</tr>
<tr>
<td>Doubt</td>
<td>13%</td>
</tr>
<tr>
<td>Anger</td>
<td>12%</td>
</tr>
<tr>
<td>Sadness</td>
<td>12%</td>
</tr>
<tr>
<td>Empathy</td>
<td>11%</td>
</tr>
<tr>
<td>Optimism</td>
<td>11%</td>
</tr>
<tr>
<td>Loneliness</td>
<td>10%</td>
</tr>
<tr>
<td>Calm</td>
<td>10%</td>
</tr>
<tr>
<td>Fear</td>
<td>10%</td>
</tr>
<tr>
<td>Connectedness</td>
<td>3%</td>
</tr>
<tr>
<td>Love</td>
<td>3%</td>
</tr>
<tr>
<td>Grief</td>
<td>3%</td>
</tr>
<tr>
<td>Trust</td>
<td>2%</td>
</tr>
<tr>
<td>Panic</td>
<td>1%</td>
</tr>
</tbody>
</table>

What two emotions are you feeling the most amid the coronavirus pandemic?
Worry and fear have decreased since wave 1, while anger and distrust have increased slightly.
CONFIDENCE IN CRITICAL INFRASTRUCTURE IS RISING, WHILE CONFIDENCE IN A SPEEDY RECOVERY IS FALLING

Question: How confident are you in each of the following?

- Healthcare institutions are operating effectively to treat all...
  - Wave 1: 13%
  - Wave 2: 8%
- Your ability to acquire food safely
  - Wave 1: 4%
  - Wave 2: 2%
- Your personal safety being unaffected by the coronavirus
  - Wave 1: 4%
  - Wave 2: 2%
- Your chances of avoiding coronavirus infection
  - Wave 1: 2%
  - Wave 2: 1%
- Public transportation is safe today.
  - Wave 1: 3%
  - Wave 2: 0%
- Your ability to work effectively
  - Wave 1: 2%
  - Wave 2: 0%
- Your banking and financial services needs being taken care of
  - Wave 1: 2%
  - Wave 2: 0%
- Your financial status being unaffected by the coronavirus
  - Wave 1: 2%
  - Wave 2: 0%
- People are abiding by safety mandates and guidelines.
  - Wave 1: 1%
  - Wave 2: 0%
- Your employment status being unchanged by the coronavirus
  - Wave 1: -1%
  - Wave 2: -6%
- Your food providers are effectively protecting the quality of your food
  - Wave 1: 0%
  - Wave 2: -6%
- People are helping each other to deal with the coronavirus.
  - Wave 1: -7%
  - Wave 2: -6%
- Your or your family’s ability to receive quality education remains unchanged.
  - Wave 1: -7%
  - Wave 2: -6%
- The economy will recover in 2020 from the effects of the coronavirus.
  - Wave 1: -13%
  - Wave 2: -18%
- The coronavirus pandemic will be effectively eliminated in...
  - Wave 1: -18%
  - Wave 2: -13%
PITTSBURGHERS’ FAITH IN POLITICAL LEADERS’ AND INSTITUTIONS’ RESPONSES TO COVID-19 IS WANING
THE VIRUS HAS DEALT A STAGGERING BLOW TO THE LOCAL ECONOMY

NEARLY ONE-FIFTH OF RESPONDENTS HAVE BEEN FORCED TO STOP WORKING, INCLUDING 18% WHO HAVE LOST THEIR JOBS TEMPORARILY OR PERMANENTLY

Has your employment or the nature of your work changed in any of the following ways due to the coronavirus? Select all that apply.

- I am now working from home: 35%
- I have temporarily lost my job: 15%
- My hours have been reduced: 11%
- My hours have increased: 9%
- I have been assigned a different role at work: 5%
- I have permanently lost my job: 3%
- I have needed to take paid leave from work: 2%
- I have recently returned to work: 1%
- Other: 8%
- My employment status and nature of my work has not changed: 15%
- I am currently retired: 18%
FOR MANY WORKING FROM HOME, PRODUCTIVITY HAS CHANGED FOR THE WORSE

**Question:**
Now that you’re working from home, how has your work productivity been affected, if at all?

<table>
<thead>
<tr>
<th>Category</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>More or much more productive</td>
<td>23%</td>
</tr>
<tr>
<td>About the same</td>
<td>34%</td>
</tr>
<tr>
<td>Less or much less productive</td>
<td>43%</td>
</tr>
</tbody>
</table>

All Respondents  n= 454  Wave 2
WHILE DISRUPTIONS TO WORK HAVE LARGELY STABILIZED SINCE WAVE 1, FEW WHO LOST THEIR JOBS HAVE YET RETURNED TO WORK

**Question:** Has your employment or the nature of your work changed in any of the following ways due to the coronavirus? Select all that apply.

- I have been assigned a different role at work: 5% (Wave 2), 11% (Wave 1)
- My hours have been reduced: 1% (Wave 2), 9% (Wave 1)
- My hours have increased: 1% (Wave 2), 1% (Wave 1)
- I have permanently lost my job: 2% (Wave 2), 3% (Wave 1)
- I have temporarily lost my job: 0% (Wave 2), 0% (Wave 1)
- I am now working from home: 0% (Wave 2), 0% (Wave 1)
- I have needed to take paid leave from work: 0% (Wave 2), 0% (Wave 1)
- I am currently retired: 0% (Wave 2), 0% (Wave 1)
- My employment status and nature of my work has not changed: 0% (Wave 2), 15% (Wave 1)
- Other: 8% (Wave 2), 15% (Wave 1)

- I have recently returned to work: 1% (Wave 2), 2% (Wave 1)
THE LOCAL RESTAURANT BUSINESS IS INCHING TOWARD A REBOUND

COMPAred to wave 1, a higher share of PITTSBURGHERS now say they have increased take-out dining, delivery, and buying from local restaurants since the virus’s outbreak.
HALF OF ALL PITTSBURGHERS HAVE DELAYED OR CANCELLED MAJOR LIFE EVENTS OR MILESTONES DUE TO THE VIRUS

These delays have most affected Pittsburghers’ employment status.

<table>
<thead>
<tr>
<th>Life Milestone</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>None of the above</td>
<td>51%</td>
</tr>
<tr>
<td>Starting a new job</td>
<td>12%</td>
</tr>
<tr>
<td>Changing career/industry</td>
<td>9%</td>
</tr>
<tr>
<td>Having a major medical procedure</td>
<td>8%</td>
</tr>
<tr>
<td>Buying a home</td>
<td>7%</td>
</tr>
<tr>
<td>Pursuing further education</td>
<td>4%</td>
</tr>
<tr>
<td>Taking out a loan</td>
<td>4%</td>
</tr>
<tr>
<td>Starting or adding to your family</td>
<td>3%</td>
</tr>
<tr>
<td>Selling a home</td>
<td>3%</td>
</tr>
<tr>
<td>Getting married</td>
<td>3%</td>
</tr>
<tr>
<td>Moving in with a significant other</td>
<td>2%</td>
</tr>
<tr>
<td>Child(ren) entering post-secondary education</td>
<td>2%</td>
</tr>
<tr>
<td>Getting divorced or separated</td>
<td>1%</td>
</tr>
<tr>
<td>Other delayed life milestones</td>
<td>0%</td>
</tr>
<tr>
<td>Other</td>
<td>15%</td>
</tr>
</tbody>
</table>
PITTSBURGHERS WANT TO SEE A SIGNIFICANT DECREASE IN CASES IN ALLEGHENY COUNTY BEFORE THEY RETURN TO “NORMAL”

**Question:**
If there were no government restrictions and people were able to decide for themselves about being out in public, when would you be most likely to return to your normal day-to-day activities?

<table>
<thead>
<tr>
<th><strong>All Respondents</strong></th>
<th><strong>n= 1,520</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>After the number of cases in the county decreased significantly</td>
<td>27%</td>
</tr>
<tr>
<td>Right away</td>
<td>18%</td>
</tr>
<tr>
<td>After a vaccine is developed</td>
<td>16%</td>
</tr>
<tr>
<td>After the number of cases in the state decreased significantly</td>
<td>14%</td>
</tr>
<tr>
<td>After no new cases in the county</td>
<td>12%</td>
</tr>
<tr>
<td>After no new cases in the state</td>
<td>7%</td>
</tr>
<tr>
<td>Other (please specify):</td>
<td>6%</td>
</tr>
</tbody>
</table>
THANK YOU!

MORE INFORMATION:
KMURPHY@CAMPOS.COM
Pittsburgh Regional Consumer Sentiment Tracker

Slides for Allegheny Conference Webinar

June 17, 2020
Established Research Provider
• Founded in 1986
• Located in Pittsburgh, PA
• 35 team members including 21 research directors, research managers, and analysts
• On-site fieldwork management

Specialize in Custom, Primary Research
• Quantitative research
• Qualitative research
• Insight communities
• Pittsburgh Speaks research panel

Personalized Approach
• Big enough to handle most research needs, yet agile enough to get to know your business and provide personalized service
• Assigned account manager; no hand-offs to junior staff

96% of clients recommend us

40% of client relationships over 10 years
50% team members with over 10 years tenure
Why a tracking study?
• Schmidt Market Research, in partnership with the Allegheny Conference, wanted to measure consumer perceptions of the economy, finances, spending plans, and other key metrics, to track how they evolve and change through the COVID-19 pandemic.

What is Pittsburgh Speaks?
• 5,000 consumers in the Pittsburgh region
• Recruited, engaged, and ready to provide feedback
• Have all their key demographic info – age, income, household size, etc.

How was the survey executed?
• Wave 1 launched March 24-26, then bi-monthly going forward
• 2,500 online survey invites sent, ~500 completes (20% response rate) within 48 hours
• Tracking questions did not change from each wave, but additional custom questions were added each wave to keep it fresh and engaging.
Who Are the 5,000 Members of Pittsburgh Speaks?

Gender
- 60% Female
- 40% Male

Home Ownership
- 54% Owns residence

Level of Education
- 55% Hold Bachelor’s degree and above

Employment Status
- 53% Work Full Time

Political Affiliation
- 43% Democrat
- 19% Republican
- 12% Independent

Children in the House
- 48% Have children under the age of 17 living in the home

Household Income
- 56% Has a household income of $50K+
- 25% $20K-$49K
- 19% $50K-$74K
- 14% $75K-$99K
- 10% $100K-$124K
- 5% $125K-$149K
- 8% $150K+

Millennials (18-39)
- 40%

Gen X (40-54)
- 43%

Boomers (55-64)
- 15%

Retirees (65+)
- 3%

83% of members are residents of Allegheny County with representation in Armstrong, Beaver, Butler, Fayette, Washington, and Westmoreland counties.
Consumers Sentiment Evolution: March to May

- Stimulus checks in mid-April may have provided a lift in feelings about personal finances, but these feelings have fallen a bit since.
- Governor Wolf’s easing of restrictions on May 15 provided a positive lift for sentiments about the regional economy, but this too has fallen off since.
- Feelings about employment have fallen significantly since early May.
Consumers Want to Support Small Business

- Most consumers plan to support small businesses, but finances are getting tighter for some.
- The most important small businesses to local consumers are dining/food/drinks, personal services, and retail.

As local small businesses begin to reopen, which best describes what your support plans have been, and what you plan to do in the near term?

How concerned are you about permanent loss of small businesses within your community?

Which small businesses are most important to you?
### Other Ways of Supporting Small Businesses

<table>
<thead>
<tr>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>“We have <strong>been ordering food from local restaurants at least once a week</strong>, if not more. I have also ordered some clothing online from small businesses, as well as gift cards from local small businesses that are currently not open.”</td>
</tr>
<tr>
<td>“I share their information on social media and tell my friends in hopes they can support the ones I can’t at this time.”</td>
</tr>
<tr>
<td>“Absolutely, <strong>word of mouth</strong>. Online sites if private business has one. Social media, and lastly driving around to see who is operating their business.”</td>
</tr>
<tr>
<td>“Buying gift certificates to use with these businesses in the future.”</td>
</tr>
<tr>
<td>“Sharing any info they post on social media and in public forums.”</td>
</tr>
<tr>
<td>“Sharing their info on social media. Inviting the owners/employees to various virtual networking events that I know of”</td>
</tr>
<tr>
<td>“Joining a local CSA for food this summer. Buying all dairy products directly from Marburger Dairy. Making sure any meals out are from locally owned businesses. <strong>Generally paying more attention to where things are made/from</strong> to ensure supporting US goods and PA goods more.”</td>
</tr>
<tr>
<td>“Sharing promotions, doing curbside pick-up, shopping small whenever possible.”</td>
</tr>
<tr>
<td>“If I can’t purchase goods or services at this time - I’ve been <strong>buying gift cards for future use</strong>.”</td>
</tr>
</tbody>
</table>
Safety Measures Business Should Take: Going Out Shopping

- In general, grocery shoppers and general retail shoppers expect similar safety measures, with some slightly stronger precautions expected from grocery stores.

Here is a chart showing what customers expect when shopping out post-COVID-19:

<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>86%</td>
<td>77%</td>
</tr>
<tr>
<td>Employees must wear masks</td>
<td>77%</td>
<td>79%</td>
</tr>
<tr>
<td>Social distancing encouraged</td>
<td>79%</td>
<td>77%</td>
</tr>
<tr>
<td>Customers must wear masks</td>
<td>70%</td>
<td>66%</td>
</tr>
<tr>
<td>Limited number of people inside</td>
<td>64%</td>
<td>64%</td>
</tr>
<tr>
<td>Employees must wear gloves</td>
<td>51%</td>
<td>44%</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>

Now thinking personally, related to going out shopping again, which of the following measures would make you feel most safe/comfortable about shopping in-store?
Safety Measures Businesses Should Take: Recreation

- There is **minimal difference** between safety measures expected at outdoor events vs. indoor events.

### What Customers Expect When Going To Concerts/Events

**Indoor (i.e. Heinz Hall)**
- Seat spacing between parties: 79%
- Sanitizer spray/wipes available: 77%
- Social distancing: 72%
- Seating cleaned after every customer: 71%
- Limited number of people "inside": 69%
- Employees wear masks: 62%
- Customers wear masks: 55%
- No cash / touchless pay: 52%
- Employees wear gloves: 42%
- None of these are necessary: 6%

**Outdoor (i.e. PNC Park)**
- Seat spacing between parties: 77%
- Sanitizer spray/wipes available: 79%
- Social distancing: 73%
- Seating cleaned after every customer: 68%
- Limited number of people "inside": 65%
- Employees wear masks: 63%
- Customers wear masks: 52%
- No cash / touchless pay: 55%
- Employees wear gloves: 46%
- None of these are necessary: 6%

Now thinking about dining out or other recreational events, which of the following measures would make you feel most safe/comfortable about going out?
Safety Measures: What Employers Should Do

- Sanitizer, frequent deep cleaning, wearing masks, social distancing, and sick leave flexibility are all “must haves” by a majority of respondents.
- On-site or off-site screenings are “nice to have” by about half of respondents.

### What Employees Want at Work Post-COVID-19

<table>
<thead>
<tr>
<th></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>“Shifts” 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>
Before the COVID-19 situation, in what ways did you conduct business?
Since the COVID-19 situation, in what ways do you conduct business?

Doing Business:
• Touchless payment & less cash
• Leveraging online business: ordering online, tele-medicine, etc.
• Improved sanitation requirements/practices
• Online market research

Employee Considerations:
• WFH / flexible work arrangements
• Skype/MS Teams/Zoom usage
• Transition to virtual conferences
• More “focused” business travel
Consumers Evolving - What Changes Will “Stick” Post-COVID?

**Payment Type Changes**

- **Used cash** LESS often: 47%
- **Used the ATM** LESS often: 57%
- **Used other Payment services MORE often** (Apple Pay, Zelle, etc.): 48%
- **Used contactless credit cards MORE often**: 25%

**Consumer Behavior:**
- **Less cash payments**
- Supporting local businesses
- More “focused” travel

**Spending Plans:**
- May need time to “catch up” on finances
- Local dining, retail, groceries may see spend
- Entertainment out, travel may be slower to recover
Looking Ahead to “Beyond Green Phase”

Consumers:
• What do consumers need to feel safe and comfortable shopping, dining out, attending events, games, etc.?
• Where are consumers struggling most? How can businesses help?
• How will travel plans be impacted?

Businesses:
• What do employees need to feel safe and productive?
• How are local consumers supporting small businesses?
• What do small businesses need to do to survive in this new environment?
• What industries will need the most assistance recovering?
Thank you!

More information: KSrigley@schmidtmr.com
Panel Discussion
Moderated by Mekael Teshome
Submit your questions via Zoom’s Q&A function.
Response + Recovery
The Allegheny Conference COVID-19 Webinar Series

TODAY:
“Building Confidence in a Responsible Reopening of the Region’s Economy”
The Pittsburgh region is getting ready to reopen responsibly.

Visit readypittsburgh.com for a curated toolbox of resources to help businesses & organizations safely return to work.
Thank you for participating.

Stay tuned for upcoming programs in the Allegheny Conference’s Response + Recovery Webinar Series ...

and find an archive of our webinars and related materials at the region’s COVID-19 Response site:

AlleghenyConference.org/COVID-19