Citizen Survey Report

The O’Fallon Chamber of Commerce, working with community partners, developed a Citizen Survey to collect information from residents about their comfort levels and spending behaviors. The purpose is to better inform local businesses on what their customers need and offer suggestions on how/what they should communicate to patrons. This survey began on May 22, 2020 and closed May 29, 2020. Engagement of the survey took place through social media, email communication, community organizations, neighborhood associations, public announcements, and word of mouth resulting in 1,488 surveys collected.

The surveys were collected from the St. Charles County region, with the majority living in the City of O’Fallon [Exhibit 1]. Some survey participants were from neighboring counties. While they do not live in O’Fallon or St. Charles County, they do work and shop within the county.
The first four questions in the survey discovered consumers’ comfort levels when interacting with businesses and others [Exhibit 2]. Overall, local consumers feel ready to leave their homes, but are still cautious about businesses being fully opened without precautions in place. Because residents have been regularly visiting retail establishments such as the grocery store, they have a higher level of comfort in continuing this practice with other retail businesses. With local restaurants opening dining spaces, [Exhibit 2] customers have a higher concern for dining in. Put side by side with their concern for large crowds it can be understood that customers distrust other patrons. This compares similarly with national consumer data that 72% of consumers are more concerned with other patrons in a business, than the business itself. When communicating with customers, local establishments should make it clear how they are preparing their space for guests.

It is important to note that residents are comfortable with a contractor or service provider working in or around their homes. In fact, residents’ comfort level with contractors and retail stores is very similar, at 40% having little to no concern. However, when reviewing all of the data, we should notice that approximately 25% are still highly concerned about engaging with businesses. These individuals are likely high risk, live with, or take care of high-risk individuals. If a business caters to this demographic, consider taking extra care to meet their needs, continue to offer options that reduce contact, and most importantly, communicate any adjustments to this population.
When consumers were asked how soon businesses should be open, 75% believe that businesses should already be open or opening by mid-June [Exhibit 3]. This supports earlier findings that 25% are still highly concerned and feel that greater precautions should be in place. It is suggested to remember this highly concerned population when creating or updating your reopening strategies.

When reviewing consumer information on spending behaviors, we should note that when crisis occurs, individuals will mostly do one of two things; pay down debt, or reserve money. This is present in the large number of citizens that used their stimulus check for bills or savings [Exhibit 4A, 4B, & 4C]. Additionally, because many people were home, many more home projects were funded. This is good news for our economy and reflects national statistics that home improvement stores are one of the most thriving industries during this crisis.
When asked what they would do with additional funds, the consumers’ responses remained similar with a slight increase in Savings and Vacation / Leisure. This behavior is typical of a crisis and should be noted by businesses that consumers may be spending less in the coming months. Customers are not fully confident to spend large amounts of discretionary funds currently.

[Exhibit 4C]

Consumers spent the following:

- **Bills**: 32.8%
- **Savings**: 30.6%
- **Home Improvement Projects**: 25.1%
- **Food / Supplies**: 16.2%
- **Dining / Entertainment**: 8.2%
- **Didnt / Wouldnt get one**: 8.5%
- **Give it away / Donation**: 8.0%
- **Vacation / Leisure**: 4.2%
- **Combination**: 4.9%
- **Clothing / Fashion**: 7.4%
- **Taxes**: 1.6%
- **Insurance**: 1.3%
- **Other**: 1.2%
- **Auto**: 1.0%
- **Investments**: 1.4%
- **Medical / Healthcare**: 0.8%
- **Entertainment**: 0.4%
- **Other**: 0.4%
In the open comments to this survey, many expressed that they believe that the Health Crisis and Economic Crisis were equally important. The results of the survey clearly show that health and well-being are still top of mind. However, [Exhibit 5] St. Charles County is slightly more concerned about the economic crisis compared with national statistics. Nationally, 60% of people are more concerned with the Health Crisis. Because our community was not as impacted by COVID-19 as coastal cities, locally we are more focused on going back to our jobs and restarting the economy.

Consider the above information when reopening and marketing your business. Half of local residents will sympathize greatly with a Shop Local campaign. However, the other half, while still supporting local, will first be concerned with how you are helping promote a healthy community. Many are still concerned about a possible second wave of this virus [Exhibit 6]. Your efforts and empathy for this will build trust with consumers as you take precautionary measures. Nationally, consumers have expressed that they are having difficulty finding out what precautions restaurants and local establishments are taking to keep them safe. Communicating this in advance will help your business recover faster.
While we are reopening the economy, it is important that businesses understand the significance of communication with customers. People are curious and anxious to get out of their homes, however, many are still cautionary. This is an improvement from March & April. Consumers have moved from ‘Fear’ to ‘Caution’. Additionally, with St. Charles County’s unemployment rate (9.6%) in April, many households are experiencing lower income. Now, more than ever, communication to the public and customers, needs to become priority for businesses. This will help your business thrive during this time if its clear how people can enter establishments and still support local from the comfort of their home.

*There is a 3% statistical margin of error for this survey
*Datassential, Datassential.com/coronavirus, March 12 – May 27 Reports
*Missouri Department of Labor, Labor.MO.gov, Unemployment Benefits by County
*Verisk Financial, April 2020 Commerce Signals, COVID-19’s Impact on Consumer Spending