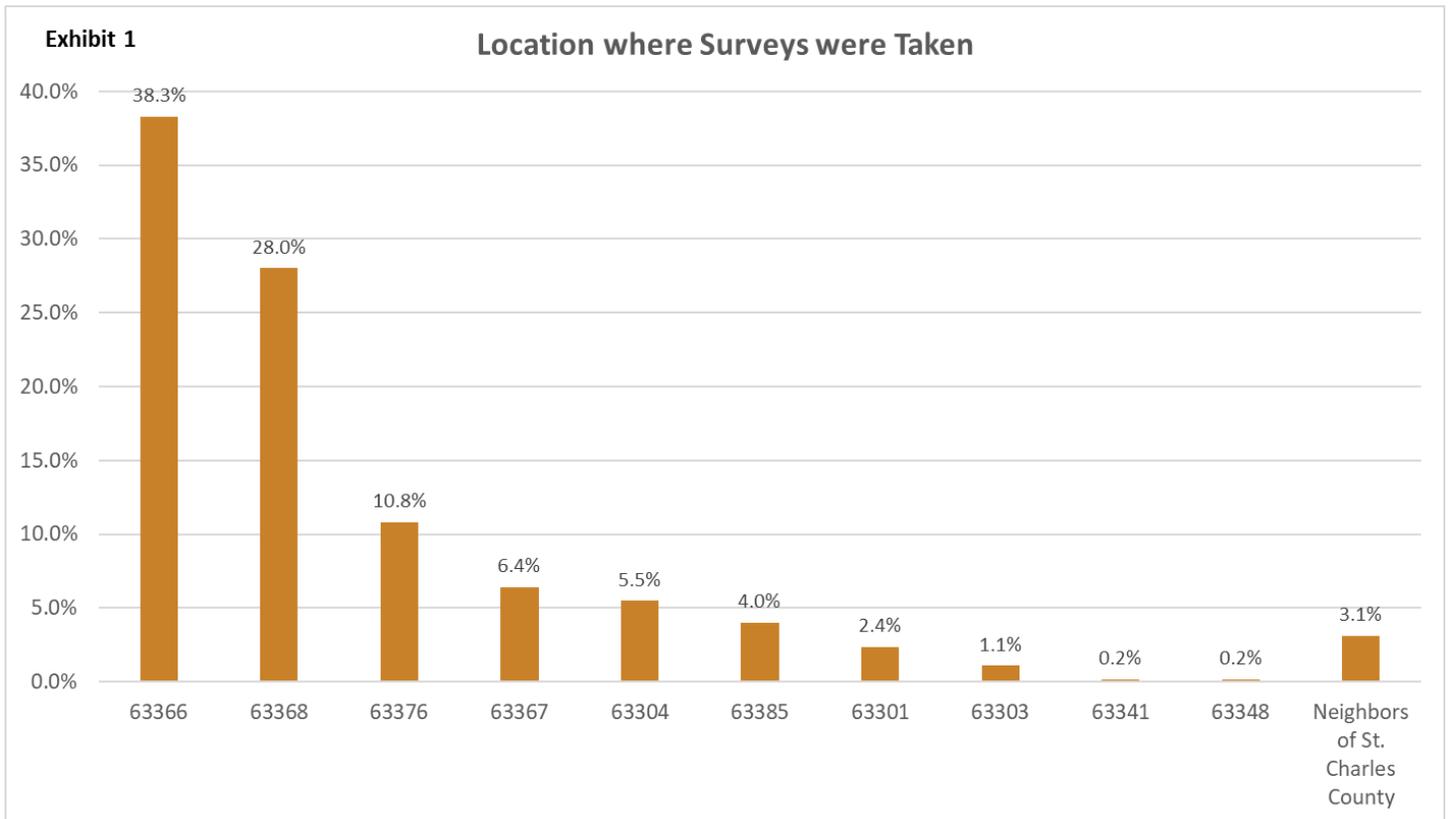




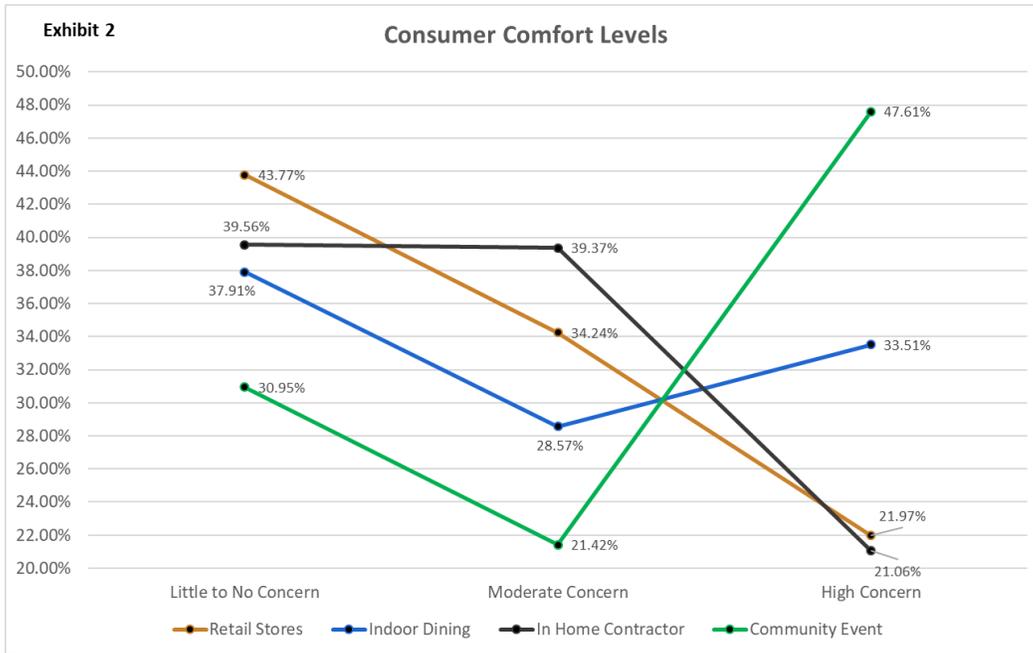
Citizen Survey #2

Report

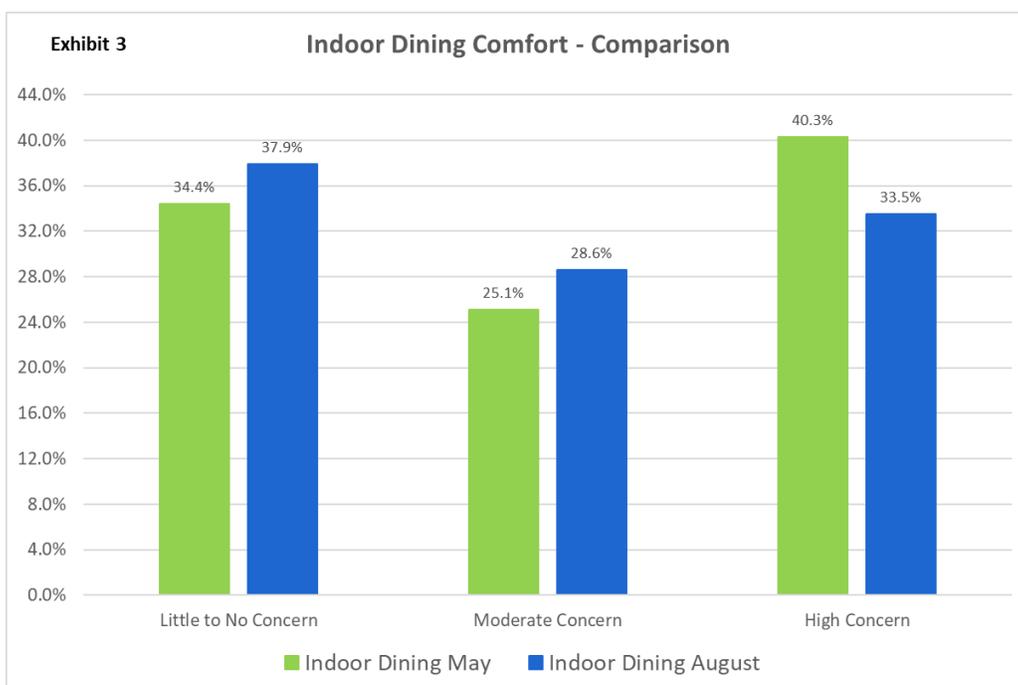
The O'Fallon Chamber of Commerce & Industries, in partnership with community partners, collected information from local citizens to better inform local businesses on consumer comfort levels and spending behaviors. The first Citizen Survey was sent out at the end of May 2020 with the same purpose. Local businesses are facing a challenging atmosphere in gaining new clients and making their current customers feel safe. The Citizen Survey #2 opened on August 7 and closed on August 14, 2020. It was promoted through social media, email marketing and community partner's sharing through various electronic platforms.



The Citizen Survey #2 had participants largely from the O'Fallon area, but a super majority from St. Charles County. [Exhibit 1] All survey participants work, shop and visit the County on a regular basis.

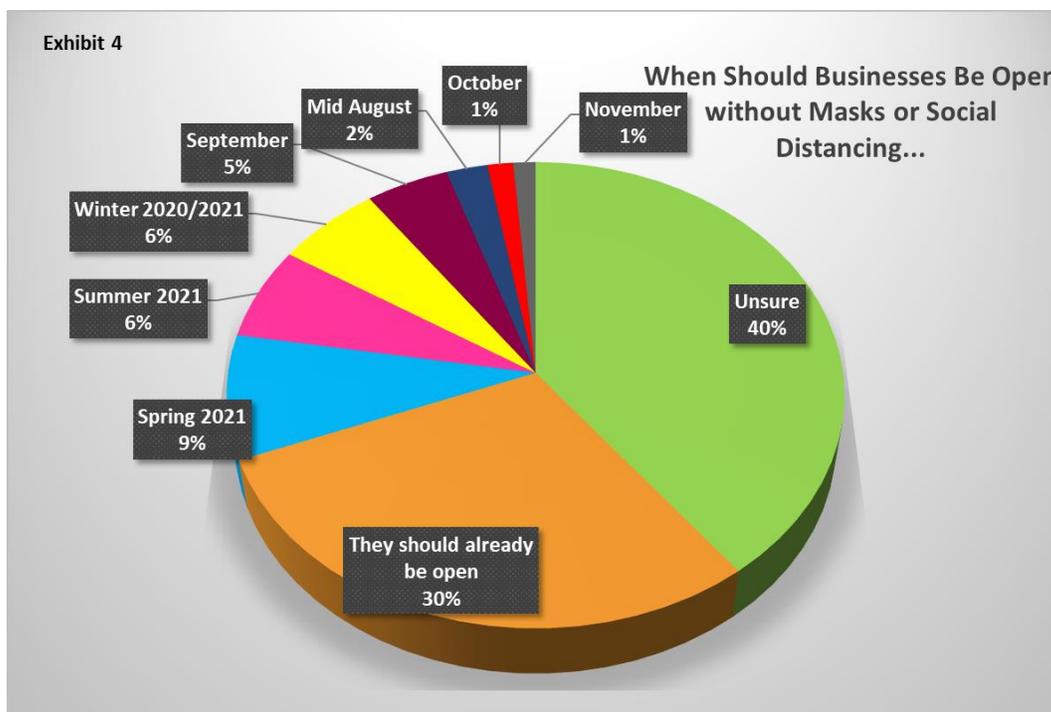


Comfort levels [Exhibit 2] were collected for entering retail establishments, dining inside restaurants, welcoming a contractor to work on or in your home and attending a community event of 200 or more people. Overall, people are still cautious about going in public although not fearful. Their highest concern is at large group events. Customers will want you to continue communicating how you are keeping them safe as they visit your business. Utilizing your outdoor space to give patrons more room will encourage them to return.

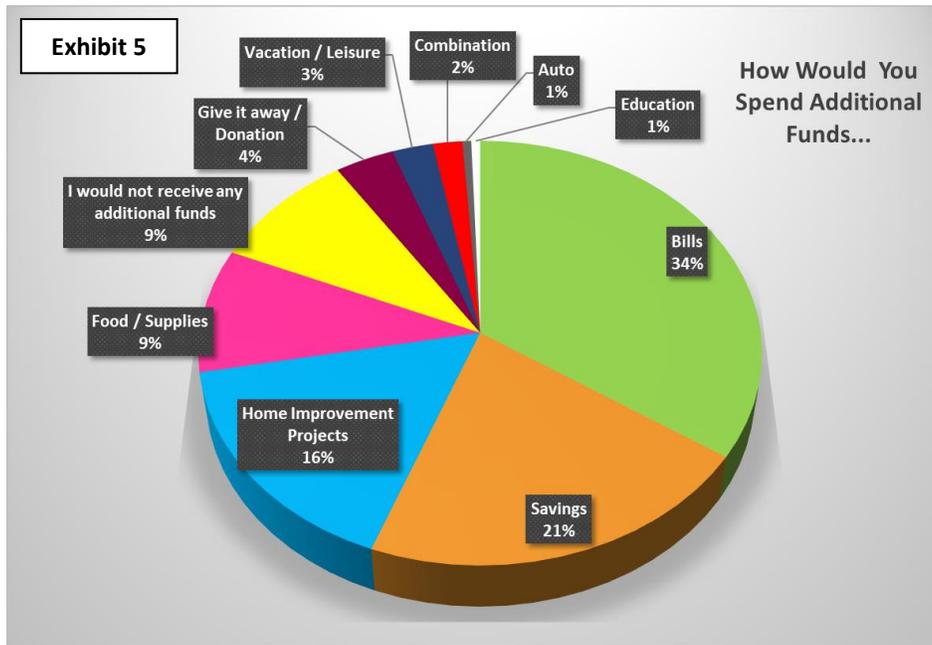




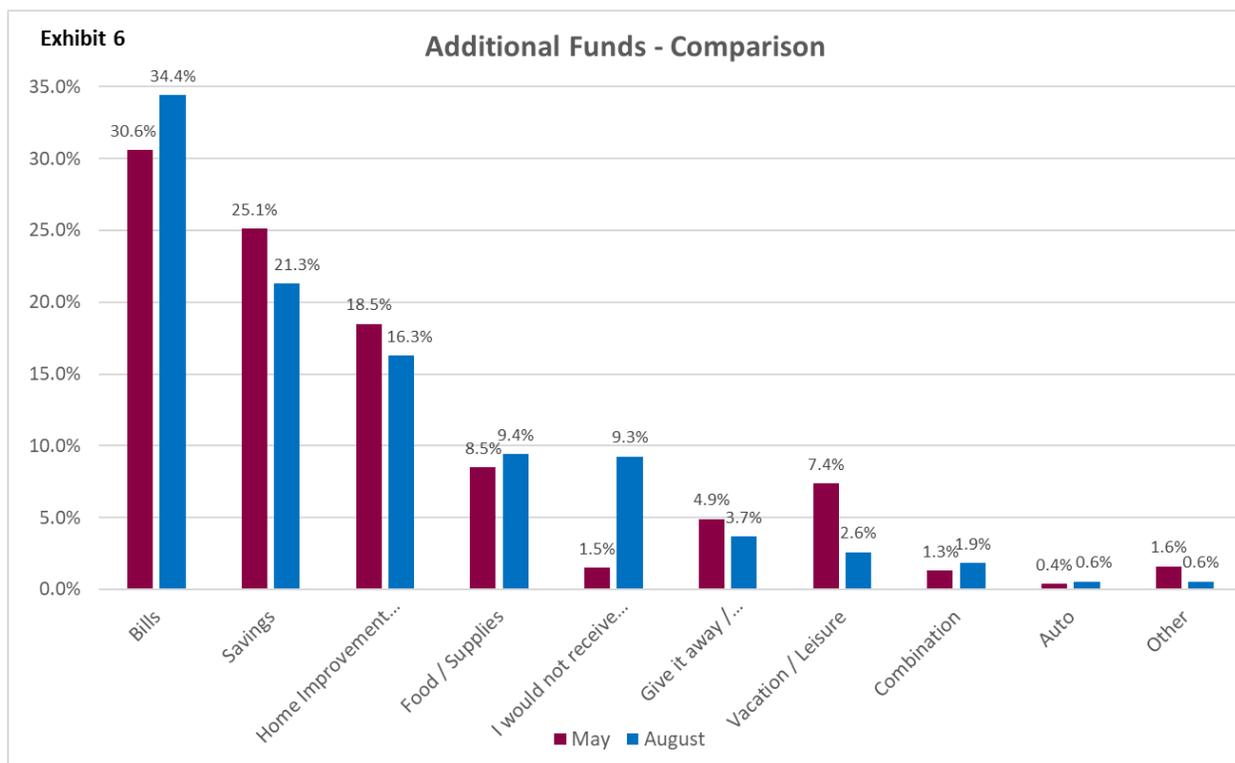
The biggest shift on comfort levels from the May Citizen Survey, is seen in customer's comfort levels dining inside a restaurant. [Exhibit 3] Local restaurants have been using their outdoor space and making sanitizing practices clear for their patrons. While these comfort levels have shifted positively, carry out options are still desired by a segment of customers. We expect indoor dining comfort levels to continue in this direction moving forward.



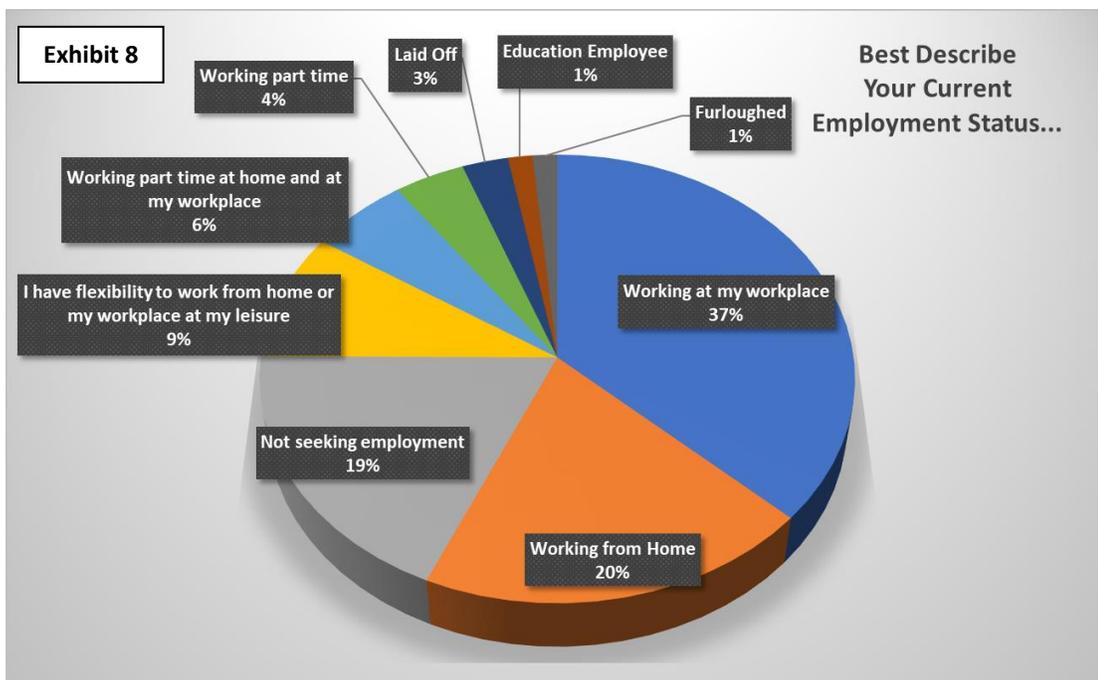
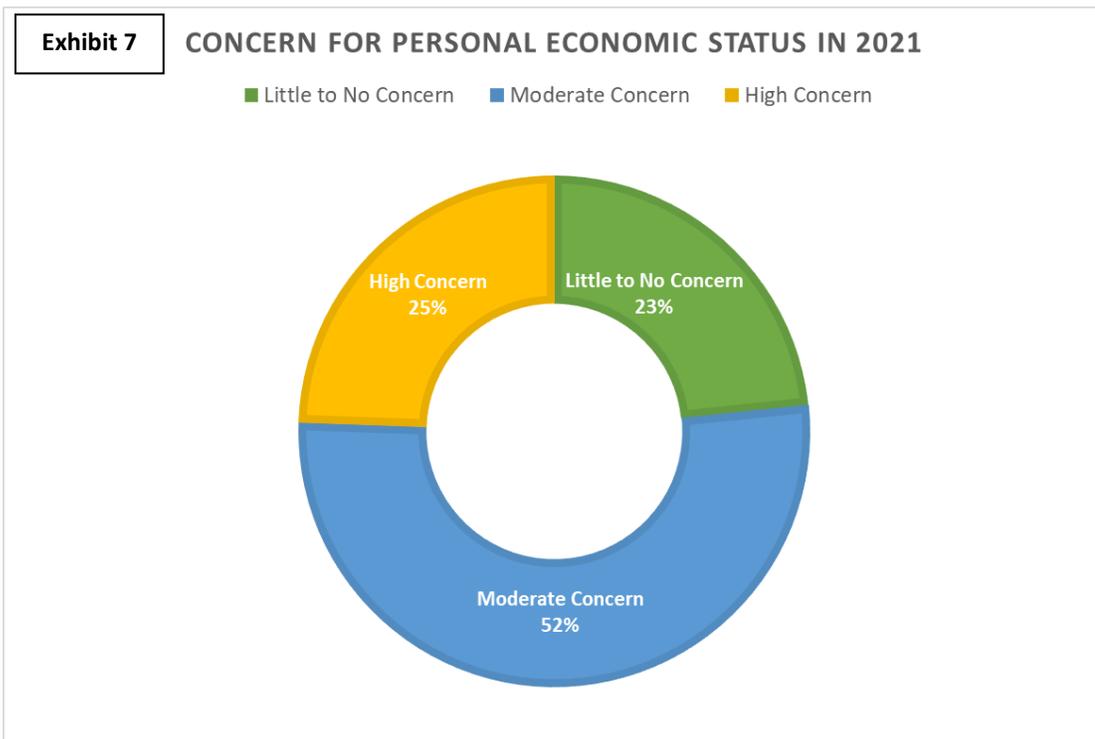
While 70% of survey participants believe that businesses should still be practicing safety measures, 40% of them are unsure when these measures should be relaxed [Exhibit 4]. A major theme throughout the survey is that the local consumer is uncertain about the future. It is seen that 30% of survey participants believe that businesses should be open now without any safety measures in place. Remember that they are not the majority of consumers. Continue with business safety practices and especially communicating how you are making patrons feel safe.



If consumers received additional funds, they would spend most of it on Bills and Savings [Exhibit 5]. This behavior is typical in times of economic stress. Consumers are paying down debt and putting aside money in savings. The most interesting information from this survey question comes when comparing it to the same question asked in May [Exhibit 6]. There is a shift from using discretionary funds in May for more leisure purposes, to essentials such as Bills, Food & Supplies. This could be a sign that consumer discretionary spending is getting smaller. Businesses can attract new and returning customers by advertising ‘specials’ or ‘discounts’. Consumers are looking for ways to save their money.

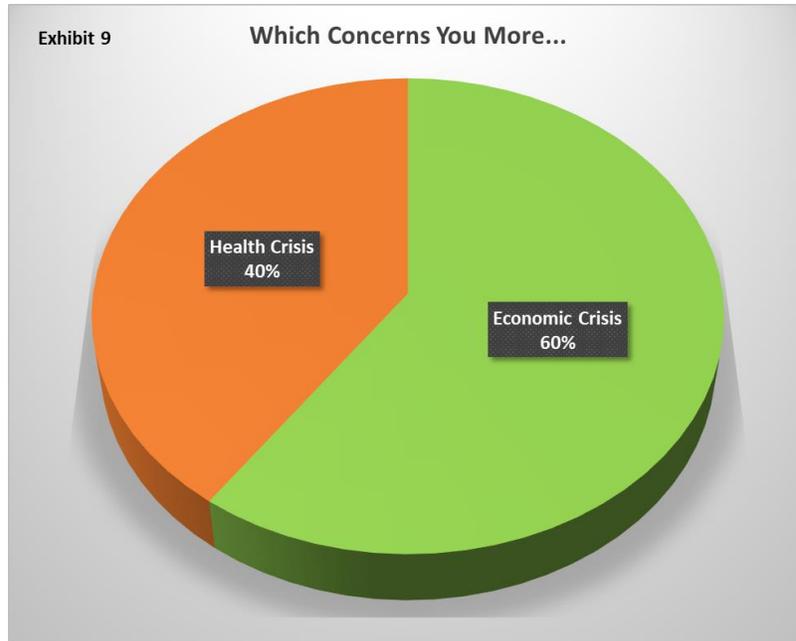


Additionally, this information reflects the consumer’s uncertainty for the future. They are preparing for any changes coming in the future and being more conservative with their discretionary funds. This is supported by half of the survey participants are Moderately Concerned for their personal economic status in 2021 [Exhibit 7]. The citizen predictive abilities, as well as the business’s, are shortened significantly due to the pandemic. When typically, people can predict what will happen with their business or household in the next few months, this time has been shortened to about a month of predictive ability.





Nationally, 30% of the workforce has the flexibility to work from home. [Exhibit 8] St. Charles County is no different with 20% working from home now and 10% having the flexibility to work from home at their leisure. It is positive to see that our community has this flexibility, but there are still many people who need to work in their workplaces. Expect this trend to continue.



Concern for an economic crisis has increased slightly in the last couple months since the May Citizen Survey [Exhibit 9]. Patrons will respond well to Shop Local campaigns and emphasizing that a business impacts more than just employees and customers. Communicate with your customers and prospects the importance of shopping at local businesses. Create marketing ads that highlight your ownership, community efforts and customer service, to attract new clients.

When reviewing the survey results from May to August of this year, a gradual shift to economic concerns is starting to emerge. A majority of citizens are still moderately concerned about their health and wellbeing, as well as their economic status. It is a great sign that the only shift in data is that people are becoming more accustomed to new safety protocols and are taking steps to patronize our local establishments. Continue to communicate with your customers on cleaning procedures, distancing between patrons and individualized customer service. An emerging trend will need to focus on how you will be saving customers money as we move through 2020. This will help your business navigate the economic atmosphere and attract new customers.