Executive Summary

Consumer Attitudes About Masks and Social Distancing in Maine Businesses

Social distancing and the choice of wearing a mask in public has become a hotly debated and divisive topic recently. As the State of Maine looks to re-open our economy, one key aspect not being addressed is consumer confidence. Through reading social media posts, conversations with friends and discussions with colleagues, the **Southern Midcoast Maine Chamber** discovered this was an issue for the Maine consumer. If we want to return to any sense of normalcy we need to address concerns the consumers may have so they can feel confident to patronize Maine businesses. Anecdotally, we knew there was uneasiness from some consumers, but we had no way to gauge how much uneasiness there was, and if it was wide spread or regional.

On the afternoon of June 4, 2020 we released a 20-question online survey created through Survey Planet, to gather consumer attitudes on social distancing in Maine businesses. Partner agencies statewide also sent the survey out to their contact lists. Our hope was to get 500 responses in a week to make it a statistically significant survey. When the survey closed June 12, we had 2,939 responses.

The survey contained four categorization questions, 15 social distancing questions and one open-ended question inviting survey feedback. The 2,939 responses were run through five separate categorization filters, thus the results within are presented in five ways. The five filters are:
- **Overall** (all 2,939 results; unfiltered by any identity metrics)

- **County** (all counties in Maine, plus "Not From Maine" & "Prefer not to say" were eligible)

- **Age** (we asked for respondent ages; 7 age groups were eligible)

- **Knowing Covid** (two eligible groups based on the response to "Do you personally know of some-one who has been diagnosed with Covid-19 or has had health complications from Covid-19? Yes/No)
- **Knowing High Risk** (three eligible groups based on the response to "Do you have regular direct contact with any individual who would be considered a higher risk for severe illness as defined by the CDC or are you in the high risk category? Yes/No/Unsure)

For the cohorts of Overall, Knowing Covid and Knowing High Risk, we used all 2,939 results.

For Age and County we only analyzed the subgroups which had 49 or more responses. For **Age** we did not analyze 0-17 (3 responses), Not From Maine (30 responses). Thus that cohort has 2,906 responses and five subgroups (18-29; 30-39; 40-49; 50-59; 60+). For **County** we did not analyze Piscataquis County (15 responses), Prefer Not to Say (27 responses) and Not From Maine (29 responses). Therefore the County cohort is based on 2,868 responses over the other 15 counties.

Here are a list of takeaways from the **Overall Results:**

- County Subgroups (15); 15 counties with York (716), Cumberland (638), Penobscot (262) and Kennebec (233) being the four counties of the 15 measured with the most responses (threshold for analyzing was originally 50 but Washington squeezed in at 49) **(Q1)**

- Age Subgroup (5): 60+ (974 resp.), 50-59 (737), 40-49 (716), 30-39 (394) and 18-29 (85) **(Q2)**

- Knowing Someone with Covid (2): Know Someone with Covid (1263) or Don't Know Someone with Covid (1676) **(Q3)**

- Knowing Someone in the High Risk Category (3); Yes (2069), No (787) and Unsure (83) **(Q4)**

- Questions 5-9 asked about the importance of five aspects of social distancing. Cleaning of high -touch surfaces was seen as the most important of the five aspects that were surveyed with **70.7% of overall respondents** ranking it as Extremely Important or Very Important **(Q7)**

- The other four aspects surveyed had the following percentage of respondents marking them as Extremely or Very Important: Employees Wearing Masks (60.1%), Signage on Social Distancing Expectations (59.5%), Customers Wearing Masks (59.0%) and Getting Social Distancing of 6 Feet When Possible (55.5%) **(Q5-Q9)**

- **¼ of all survey respondents** said they have left a business they intended to purchase something at without purchasing it because they felt unsafe due to those around them not practicing safe social distancing practices. An **additional ¼ of respondents said they would leave a business without purchasing an item if they were to be in that situation**– thus a majority of respondents said they have done this or would do this **(Q10)**

- Similarly, over **50%** of respondents said they have vowed to not return to a business that had unsafe social distancing practices **(Q11)**

- **22%** of respondents have either posted on social media or told a friend or family member about a **specific business or employees** at a specific business when they witnessed recommended Covid-19 health and safety regulations not being adhered to **(Q12)**

- **32%** of respondents have posted on social media or told a friend or family member about **customers at a specific business** when they witnessed recommended Covid-19 health and safety regulations not being adhered to **(Q13)**

- An additional **10%** and **8%** said the would post or tell a family member about unsafe practices by employees or customers in a specific business if they encountered it **(Q12 & Q13)**

- Over **30%** of respondents disagree with the statement: it is "the responsibility of the business to enforce the health & safety protocols within their business, and remind customers to adhere to them". Overall, **69%** of respondents feel it is the responsibility of the business, including over **80% of respondents in the 60+ age group (Q14)**

- Question 15 offered 11 statements that respondents could agree with about how they react when they see social distancing guidelines not being followed, and the six most popular overall answers were:
    (1) "I will reach out to friends who I know are high risk for infection and tell them to avoid that business" 41.1% (1207 responses)
    (2) "I will consider not returning to that business next time" 39.6% (1164 responses)
    (3) "I won't return to that business in the future" 28.2% (829 responses)
    (4) "I will leave that business immediately" 27.3% (803 responses)
    (5) "It doesn't bother me" 24.5% (719 responses)
    (6) "If they force me to wear a mask I will go somewhere else" 21,4% (629 responses) **(Q15)**

- When asked 'what is more important:
  - Supporting a business I love so that they are around for years to come
  - My health & safety and the health & safety of my family and loved ones
  - They are equally important
  the overall results came back about **1/4** for business, **1/4** for health and **1/2** for both **(Q16)**

- - **2/3** of survey respondents say they **would** travel **over 10 miles** to shop and eat in a community that pledged to follow safe social distancing practices, **or at least consider** doing so **(Q17)**

- **Over half** of survey respondents say they would shop and eat in a safe community if it were **25 miles** or more away, **or at least consider** it (roughly ¼ said they **would** and ¼ said they'd **consider** it) **(Q18)**

- **1 in 10** respondents said they **would** travel **over 50 miles** to do the same and an additional **23%** said they would **consider** going 50 miles to do it (meaning **1/3** of respondents could) **(Q19)**

- Question 20 is open-ended asking for feedback, and Question 15 had a write-in option and both of these open-ended answers are still being evaluated **(Q20 and Q15)**

Here are three takeaways from the **Age, Knowing Covid & Knowing High Risk cohorts**

- Questions 5-9 compared how much value respondents put on five aspects of social distancing. When analyzing the results, **21.2% more respondents** in the **60+ age group valued these social distancing aspects** than the second most positive answer from any other age subgroup

- When analyzing the same results for Questions 5-9, **16.6% more** respondents who **Know Someone with Covid Complications** valued these social distancing aspects than those who Didn't Know Someone with Covid

- When analyzing the same results for Questions 5-9, **15.2% more** respondents who **Know Someone in the High Risk** Category valued these aspects than the second most positive answer from either other subgroup in their category (Not Knowing Someone, and Unsure)

The Pro-Social Distancing Analysis for Age, Knowing Covid & Knowing High Risk Cohorts

The **Question Breakdown** has much more in-depth information and drills down much further into the subgroup answers then this Executive Summary does so please read the full report. We would be remiss if we didn't make one final key point about the three cohorts described above. This rationale is complicated but the **results are very meaningful** so we urge you to stay with this. These are some of the biggest takeaways form the survey.

The **Age, Knowing Covid & Knowing High Risk cohorts** all had one subgroup that vastly distanced themselves from their counterparts and there is great value in recognizing that. To quantitively showcase that we ask you to try and follow this rationale (admittedly it will make much more sense after you read the full report):

In order to find the Pro-Social Distancing stance, you must first remove the categorization questions (Q1-Q4), and Question 20. You will discover this is really a 15-question survey on consumer attitudes. Opinions are shared in Q20's open-ended answers but it's difficult to quantify those for this exercise.

Thus let's look at the 15 remaining quantifiable questions. What we want to do is find the most 'pro-social distancing' answer possible for each of the remaining questions.

Questions 5-9 have five responses possible when judging the importance of five social distancing aspects. The five possible answers are: Extremely Important, Very Important, Somewhat Important, Not Important At All and No Opinion/Hadn't Thought About It. The most "pro-social distancing" answer for Q5-Q9 are people who graded the aspects as Extremely Important or Very Important.

Questions 10-13 has Yes, No, and I Would as the three answers, so we selected the YES responses.

Question 14 asks about the business responsibility of enforcing health and safety protocols, so clearly Yes is the pro-social distancing answer.

Questions 17-19 has Yes, No and I'd Consider It as their answers so we selected YES responses.

Question 15 & Question 16 were omitted from *this particular analysis only* of finding the most pro-social distancing stance because unlike the other 13 questions the answers were not as clear as YES, Extremely Important or Very Important.

Here is the conclusion:
Now that we have identified the pro-social distancing answers on those 13 questions, the last step is to **compare the answers from each subgroup to the overall results for each question**. For example on Question #5, the overall results say that 60.1% ranked employees wearing masks as Extremely or Very Important. When you look at the subgroups, 77.7% of the respondents in the 60+ Age subgroup ranked employees wearing masks as Extremely or Very Important. Therefore, **17.6% more of respondents in the 60+ Age Group think employees wearing masks is very or extremely important as compared to the average respondent**. This tells us that this particular aspect is much more important to this particular subgroup then the average respondent.

Conversely, the 50-59 Age subgroup had 53.1% of their respondents who ranked employees wearing masks as Extremely or Very Important. That is 7.0% less than the average respondent (remember the overall average was 60.1%). Therefore, **50-59 Age group respondents, find employees wearing masks as 7.0% less important then the average respondent**.

Everything in these subgroups is a comparison to the average. . This is where the **Age**, Knowing **Covid** and **Knowing High Risk** groups showed very telling results.
By using this 13-questions snapshot, with those answers <u>above the average</u> *meaning this subgroup places more importance on social distancing) and the answers* <u>below the average</u> *meaning this sub-group places* <u>less importance on social distancing</u> these are the **averages for each subgroup** when totaling how they compared to the overall average on these 13 questions:

Age
60+   For the 13 questions averaged +10.85% **above** the overall average
50-59 For the 13 questions averaged - 4.42% below the overall average
40-49 For the 13 questions averaged - 3.95% below the overall average
30-39 For the 13 questions averaged - 8.23% below the overall average
18-29 For the 13 questions averaged - 11.09% below the overall average

Knowing Covid

Knowing Someone With Covid   For the 13 questions averaged +6.94% **above** the overall average

Not Knowing Someone w/ Covid For the 13 questions averaged –5.28% below the overall average

Knowing High Risk

Knowing High Risk Person   For the 13 questions averaged +4.32% **above** the overall average

Unsure You Know High Risk Per. For the 13 questions averaged –9.86% below the overall average

Don't Know High Risk Person   For the 13 questions averages –11.38% below the overall average

In fact for the 13 questions tested, <u>Knowing Someone with Covid</u> was above the overall average on 13 out of 13 questions. <u>Not Knowing Someone with Covid</u> was above the overall average <u>0</u> out of 13 questions.

For the 13 questions tested, <u>Knowing a High Risk Person</u> was above the overall average on 13 out of 13 questions. <u>Unsure</u> and <u>Don't Know High Risk</u> were <u>below</u> the average <u>on every question</u>.

For the 13 questions tested, <u>60+</u> was above the overall average on 13 out of 13 questions, <u>50-59</u> and <u>18-29</u> were <u>never above</u> the average on a single question. <u>30-39</u> was above the average <u>once</u>, on Question 19 they were +<u>0.3%</u> above the average. <u>40-49</u> was above the average only <u>once</u> on Questions 18 with +<u>0.4%</u>.

<u>Conclusion</u>

In this Executive Summary we have barely touched on the **County** cohort and that is purposeful. The county cohort is a fascinating group to look at depending on which part of the state interests you, however we didn't feel we could determine the 'why' from these counties, only the 'what'. We don't know <u>why</u> these counties hold these beliefs. All we know is <u>what</u> the results of the survey are. The value in the county data comes from the relationship to the average so counties can see where they stand in relation to other parts of the State.

One important point about the <u>County results</u>, is that we identify the outliers in every question in the report for which counties were significantly above or below the average. However, that is a disservice to the <u>counties with the most respondents</u>. <u>York</u> and <u>Cumberland</u> make up 45% of the responses, so often their views help move the average to where it is. To determine where they stand in comparison to the State you would need to pull out their responses from the whole to see where the averages would be if they hadn't responded. We have not done that, but if we do we will share that data with those county partners.

That is the overall hope with these County results, that this information will provide towns, counties and regional chamber of commerce organizations with an idea of how their area views social distancing. This can be very helpful in determining messaging, attracting customers and convincing board colleagues of future programming.

Moving on to other insight, we can say some of the results gleaned from this expansive survey are <u>things we may have suspected but had not known were definite</u>. For instance, we could likely conceive that those who know someone affected by Covid would value social distancing more, but we didn't know how much more without these numbers– and it is significantly more. It's true that those that have regular direct contact with someone who is in the high risk category also value social distancing more than those that don't (or even those that are unsure if they know a high risk person).

One unexpressed goal was to determine what matters more– knowing someone with **Covid** or knowing someone potentially in the **High Risk** category? Do you need a connection with someone who has had Covid to value social distancing, or is the threat of it enough? Or is there no difference?

From this survey we can determine that answer is unresolved. Yes we can clearly see in the data that both groups greatly outperformed their counterparts in their filtered groups. Admittedly, Knowing Someone With Covid had responses **higher above the overall average** then Knowing Someone in the High Risk Category; but Knowing a High Risk Person had a **larger margin between their results** and their subgroup counterparts. So, we remain unconvinced which one plays a larger role than the other– but unquestionably we agree both do have a major effect on your views of social distancing. Take a look at the full report perhaps you can find a more concrete conclusion we may have missed.

In closing, businesses need to read this report. **Adhering to social distancing makes good business sense**. 25% of respondents have walked out of businesses without purchasing something because they felt unsafe. An additional 25% have said they would walk out of a business if they felt unsafe. 25% of respondents will drive over 25 miles to shop in a safe community and another 25% say they would consider it. If that were *the only takeaways, that would be enough to take social distancing seriously*. In a year when many businesses are expecting overall losses of 30-50% or more, each potential customer matters that much more. If for nothing else, if your business relies on customers over the age of 60 you need to start social distancing tomorrow. It is clear how much they value it.

Finally, it's important to remember that when speaking about surveys, everything is generalities– that's literally what a survey is- getting a large data set and analyzing it to determine trends of the majority. Which is to say, for every statistic that says 70% of people feel one way, there are then 30% who feel the exact opposite. As a business owner, you have to decide how you'll handle your own business.

There are some businesses who will reject social distancing and the 21.4% who said 'if they force me to wear a mask, I will go elsewhere' will love that business rejecting the norm. No survey results are absolute, and at minimum, even the strongest survey results still result in 20-30% of people going against the majority.

Can a business survive if their customers are from that 20-30% not in the majority- of course they can. However, that doesn't mean that it's an even either/or decision- or anywhere close to even. All businesses can't survive on that 20-30% minority- only some can. Which is why we have surveys in the first place- to find out what most people want.

Does everyone like social distancing? Nope. But the majority of customers value it, and when we're trying to determine what side to take as a chamber of commerce, we need to make sure that the highest number of them can survive the gauntlet that is 2020. We'll take the side of the majority. It's not absolute- but we need to help the most people we can- which is why this survey is so important. In this case, social distancing does make for good business.

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