

Insights from the New Jersey business and organization COVID-19 impact survey

June 12, 2020

Survey conducted by John J. Heldrich Center for Workforce Development, Rutgers University
<https://heldrich.rutgers.edu>

Survey Background / Sample Demographics

Fielded online May 21 – June 3, 2020

Distributed through industry associations/
chambers/social media

Restricted to business and non-profit leaders who
are primary decision makers

Conducted in both English and Spanish

The **~3,800 responses** mirror the New Jersey
business community in size and industry
composition

Most respondents have **less than 10 employees**
and vary across sectors

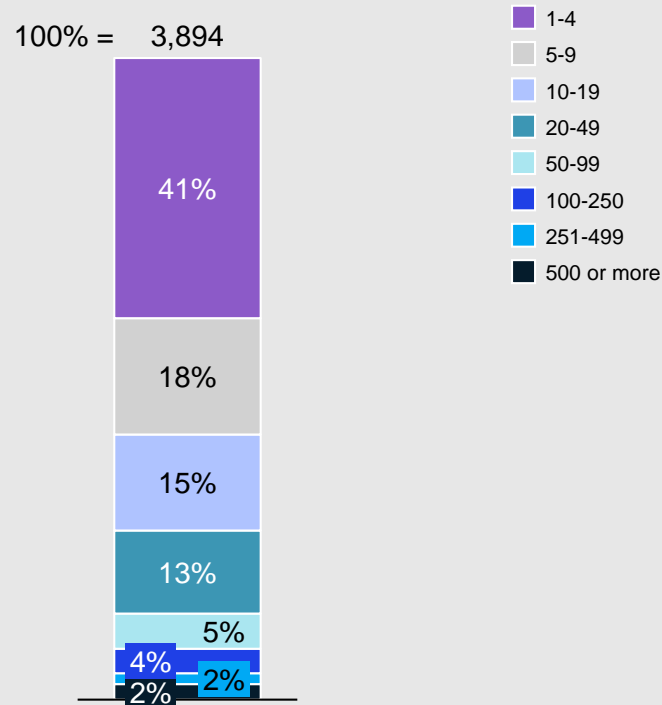
Most have **been in operation for at least 10
years**

**Half of the survey sample is woman or
minority-owned**; >200 nonprofits responded

Responses are evenly distributed across North,
Central, and South Jersey

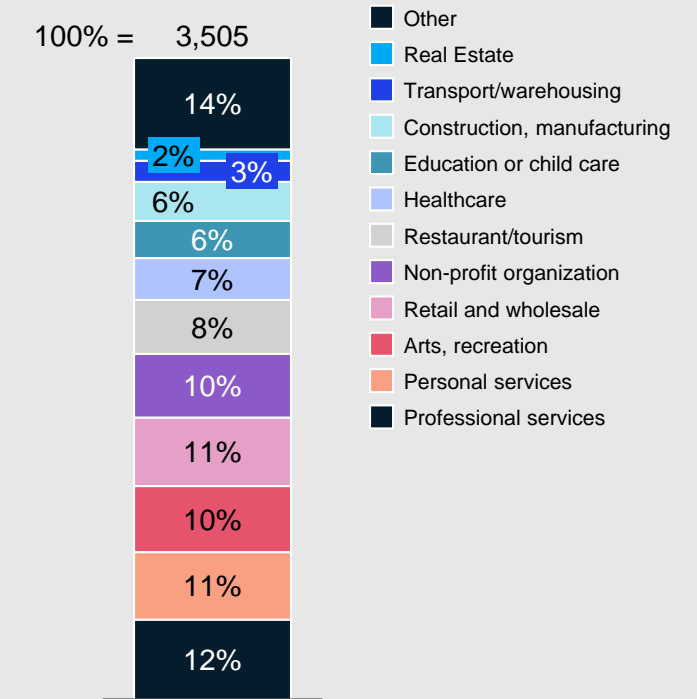
Additional sample demographics begin on page 18

Employers surveyed by number of employees, % of employers



Medium size employers (e.g., 5-9, 10-19, 20-49, 50-99) are over-represented in the survey population compared to NJ overall

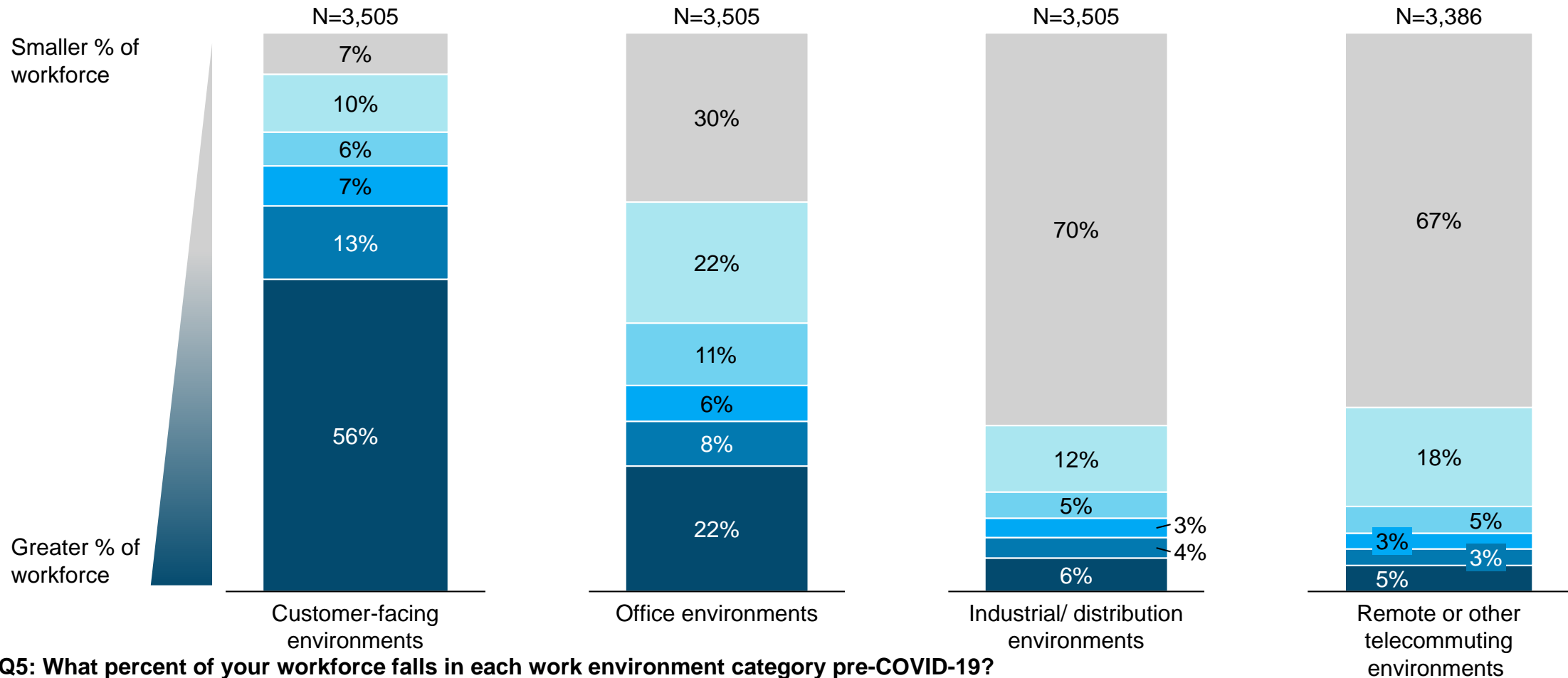
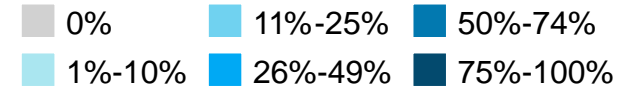
Employers surveyed by industry % of employers



Personal services and arts and recreation are over-represented in the survey population compared to NJ overall

56% of respondents' workforce works mainly in customer-facing environments

Survey responses by work environment
% of responses



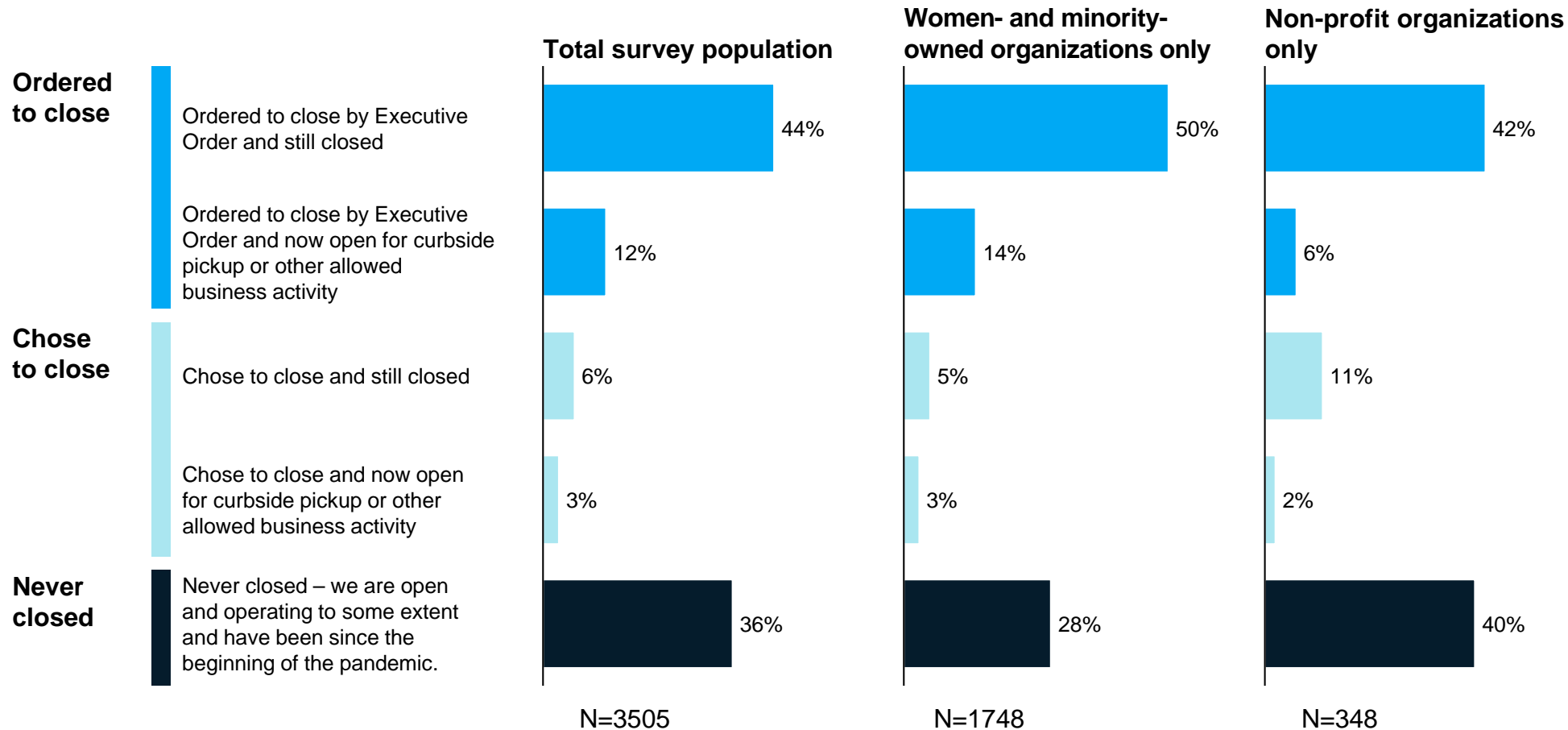
Q5: What percent of your workforce falls in each work environment category pre-COVID-19?

Source: Rutgers University's Heldrich Center for Workforce Development
NJ COVID-19 non-probability impact survey for businesses/ organizations;
May 21, 2020 to June 3, 2020

~65% of businesses closed at some point, >50% of which by Executive Order

Operational status of respondents

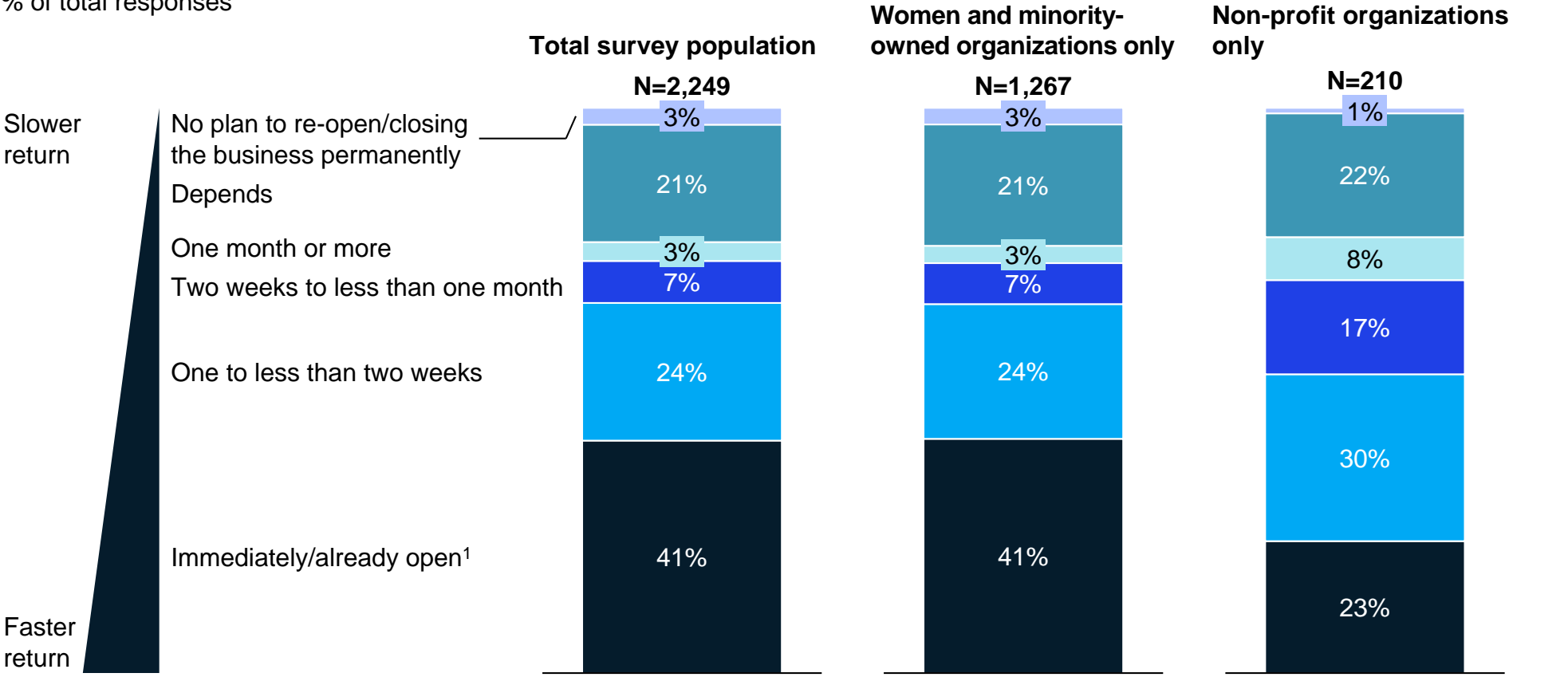
% of total responses



Q7: Which of the following best describes your business/organization?

Most respondents (~65%) who closed expect to reopen immediately or less than two weeks after restrictions are lifted

Respondents plans to reopen % of total responses

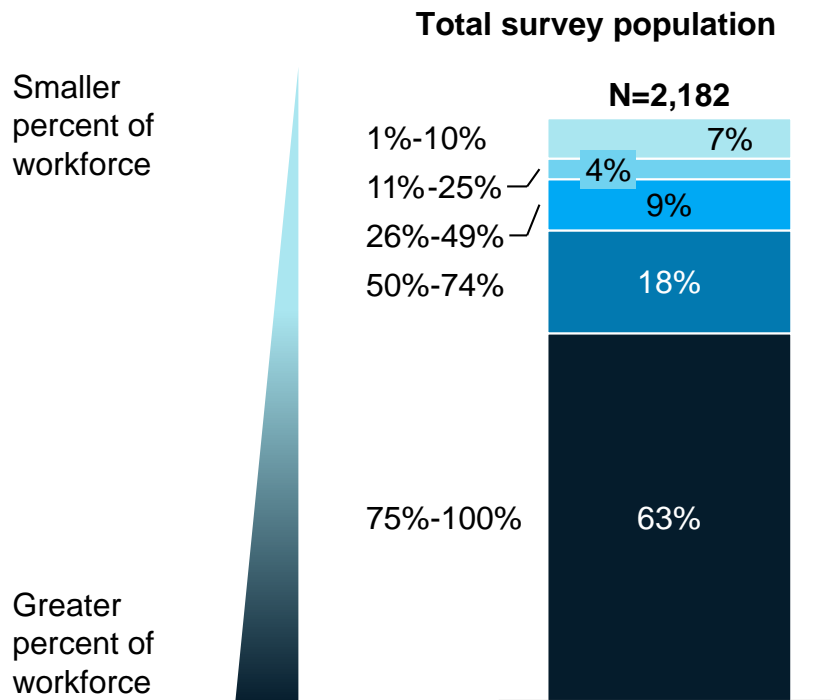


1. "Already open" refers to organizations which were closed by EO or by choice that have restarted either due to Executive Order restarting or by choice

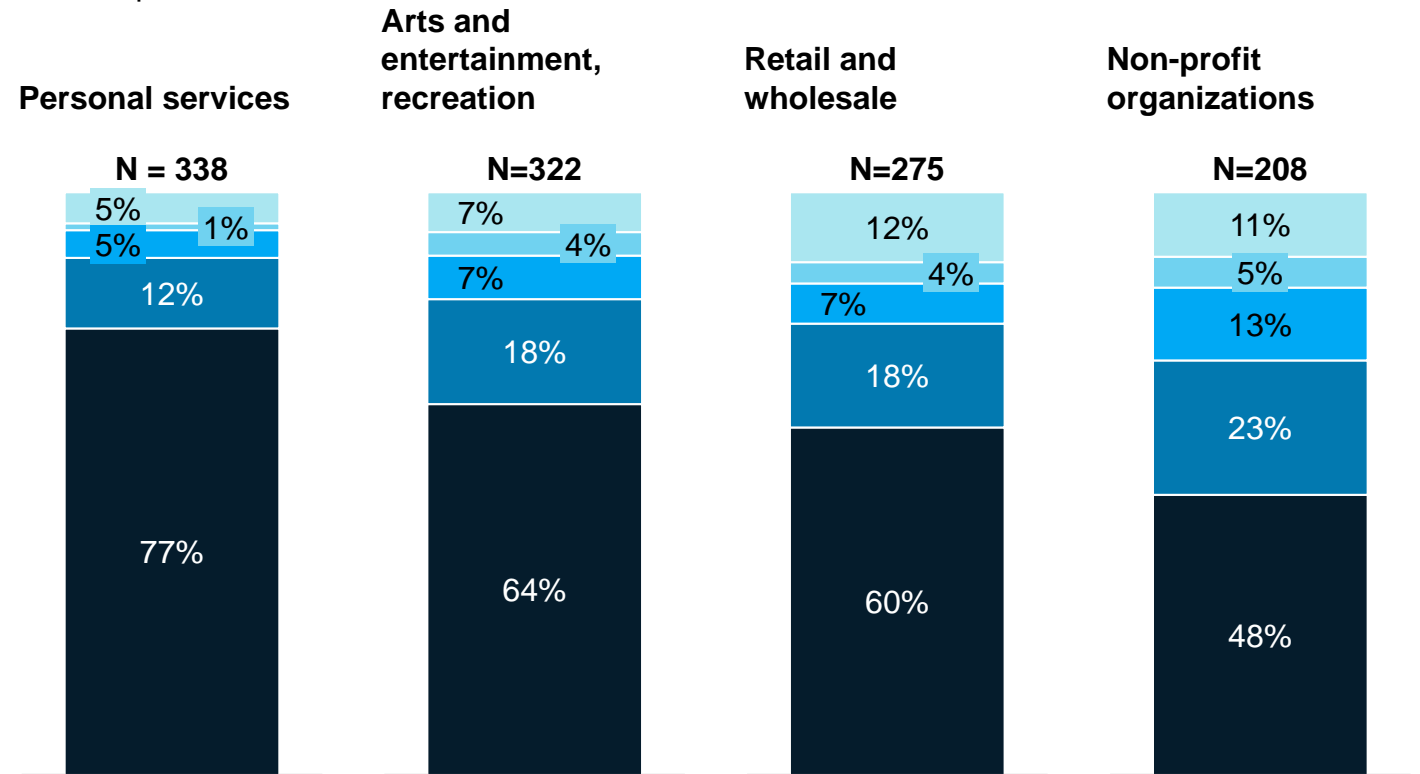
Q14: How soon after New Jersey lifts restrictions on your business/organization do you plan to re -open for business?

Most respondents need greater than 3/4 of their workforce in-person to operate productively

Percent of workforce needed to operate efficiently % of responses



Percent of workforce needed to operate efficiently by select industries
% of responses

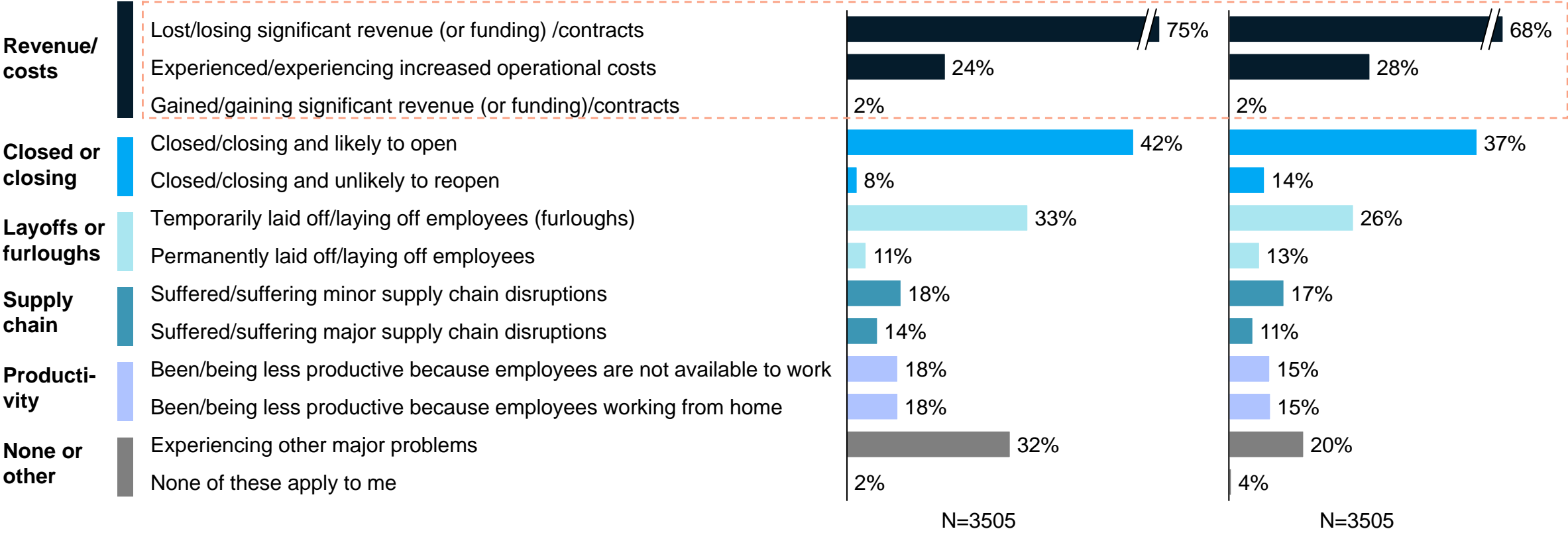


Q18: If a re-opening of your business facilities is allowed, what percentage of your workforce is needed in-person for your business/ organization to operate productively?

Due to uncertainty about consumer confidence, 68% of survey respondents expect to lose significant revenue or funding in the next 3 months

Impact of COVID-19 on survey respondents...

% of total responses, not mutually exclusive

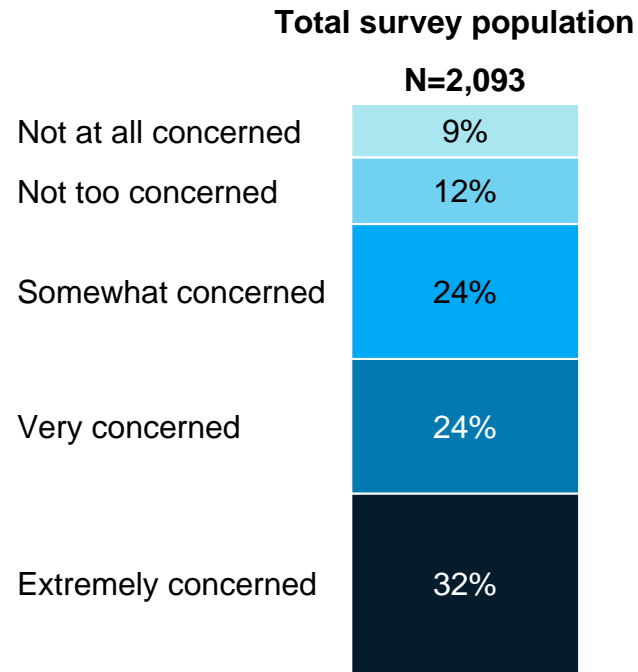


Q10a, b: Thinking about the impact of COVID-19 on your business or organization...How has your business/organization been affected to date? How will your business/organization be affected in the next 90 days?

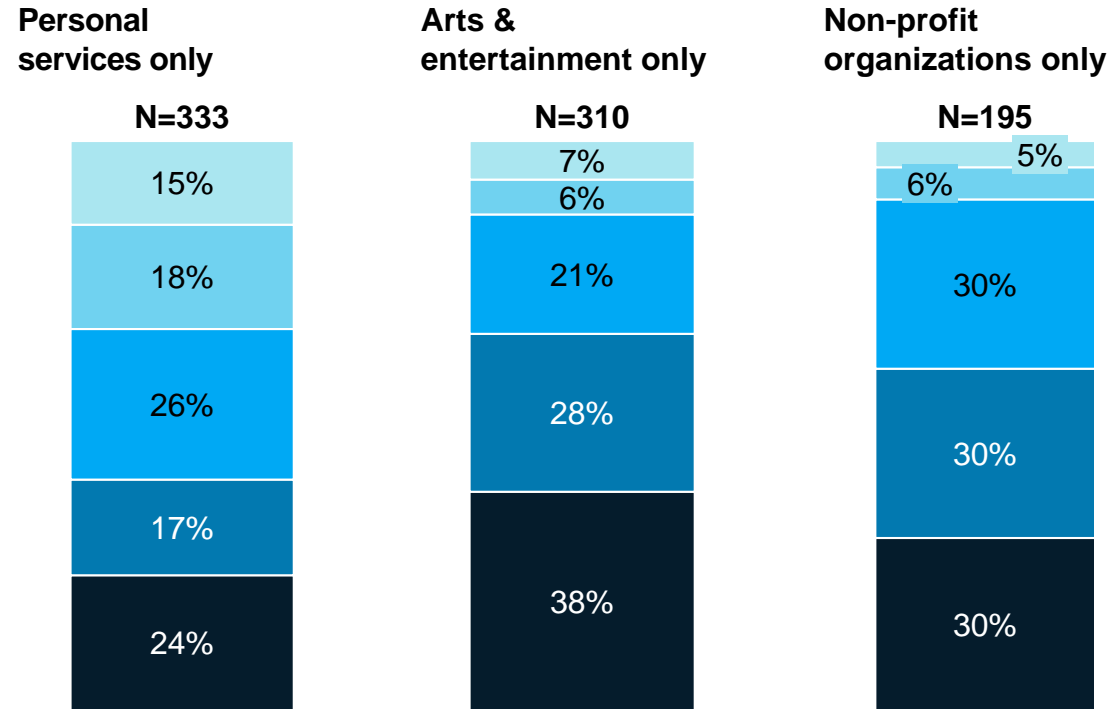
Source: Rutgers University's Heldrich Center for Workforce Development
 NJ COVID-19 non-probability impact survey for businesses/ organizations;
 May 21, 2020 to June 3, 2020

~1/3 (32%) of survey respondents are extremely concerned about customer confidence; more than half (56%) say they are very or extremely concerned

Survey respondent concern about low consumer confidence during reopening % of responses



Survey respondent concern about low consumer confidence during reopening, by industry % of responses



Q30a: How concerned are you that customers will not feel confident enough to come to your business/organization as you re-open?

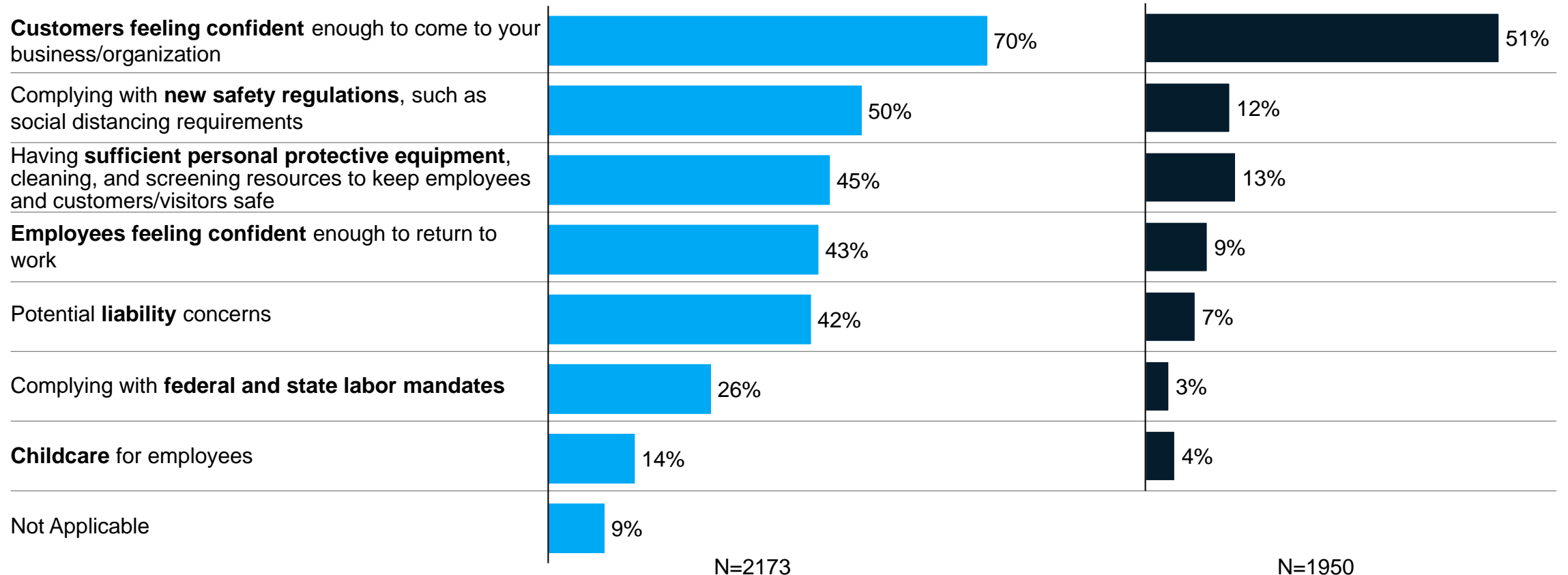
Businesses/organizations are MOST concerned about customer confidence. There is some concern about complying with new safety regulations, having sufficient PPE, employee confidence, and potential liability issues. Respondents are less concerned about childcare or worker availability.

Challenges business leaders expect when reopening

% of respondents, not mutually exclusive

Indicate a major challenge...

Most concerned about...



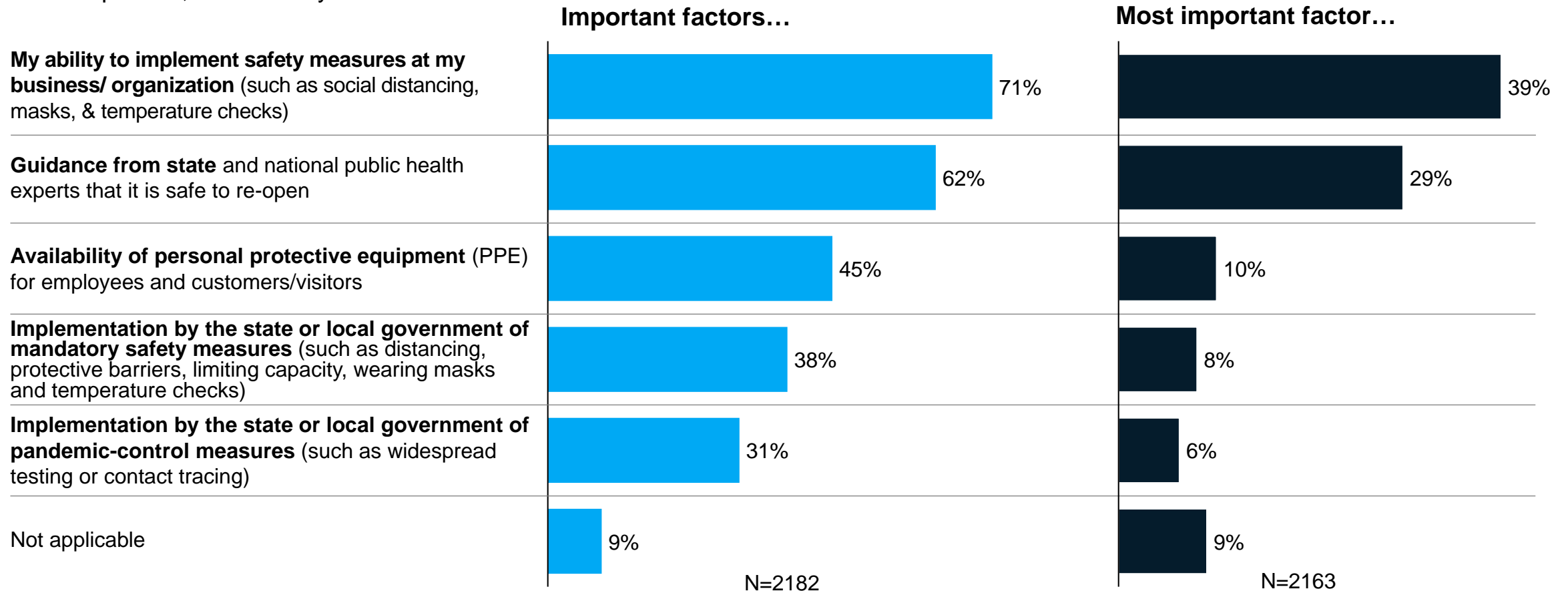
Q28: Thinking about re-opening... which of the following factors are a major challenge affecting your business or organization?

Q29: Which challenge are you MOST concerned about?

Respondents indicated that implementing safety measures such as social distancing is the most important factor to enable safe reopening

Survey respondents factors that will enable safe reopening

% of responses, not mutually exclusive



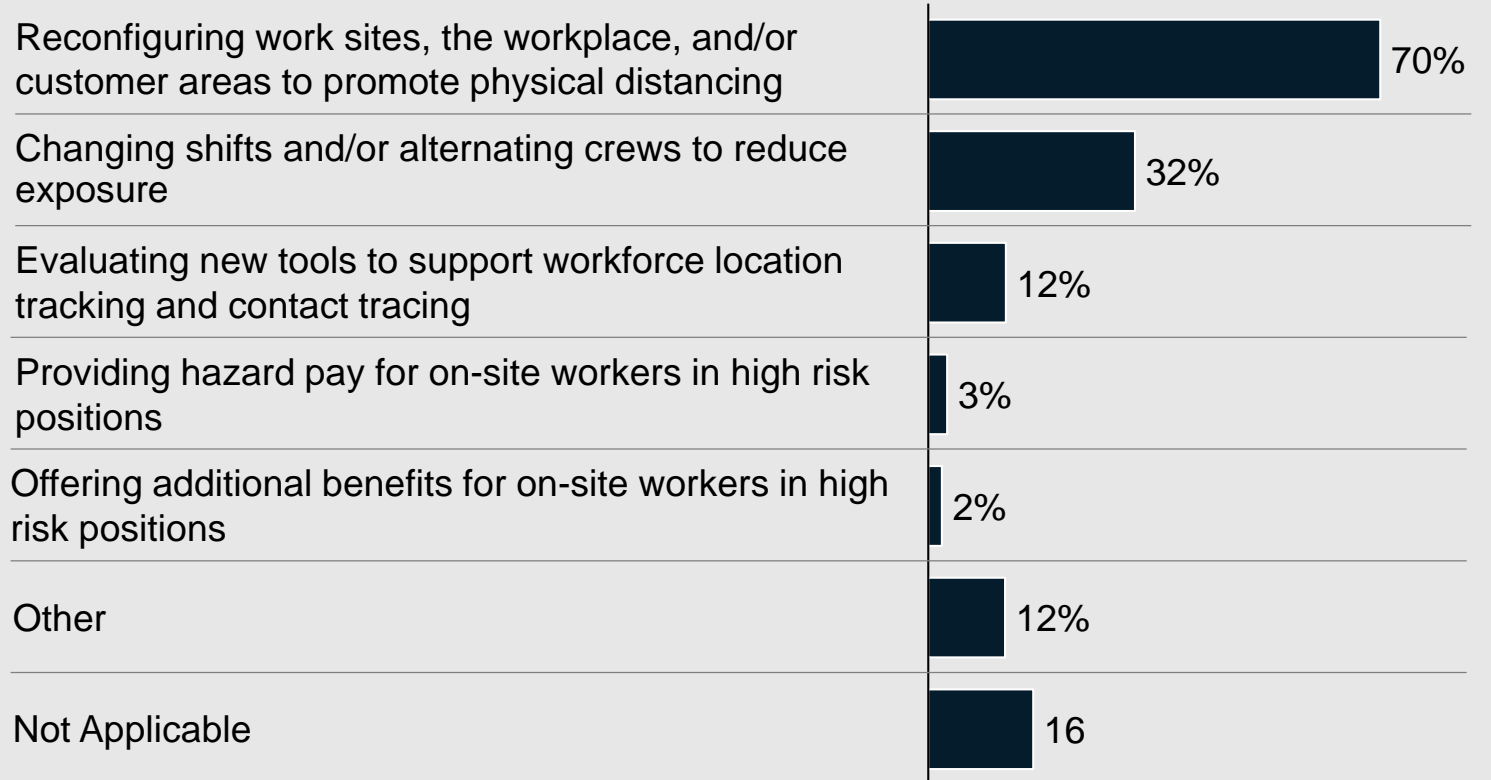
Q24: Which of the following safety factors are important to enable you to re-open your business/organization safely?

Q25: Which is MOST important to enable you to re-open your business/ organization safely

A significant number of respondents are **also concerned about their ability to require customers/visitors to socially distance by six feet**; a majority plan to **change their business operations to achieve social distancing**, including re-configuring their workplace

Survey respondents plans to change operations during reopen

% of responses, not mutually exclusive



N=2150

Q39: Which of the following things is your business/organization planning to implement as you re-open?

Among customer-facing respondents, limiting the capacity/ occupancy of their storefronts or offices will be the most difficult safety measure to implement

Survey respondents most difficult safety measure to implement

% of responses

Limiting the number of individuals inside the place of business at one time, including employees, customers, and visitors

Requiring customers or visitors to socially distance by 6 feet

Requiring customers or visitors to wear facemasks

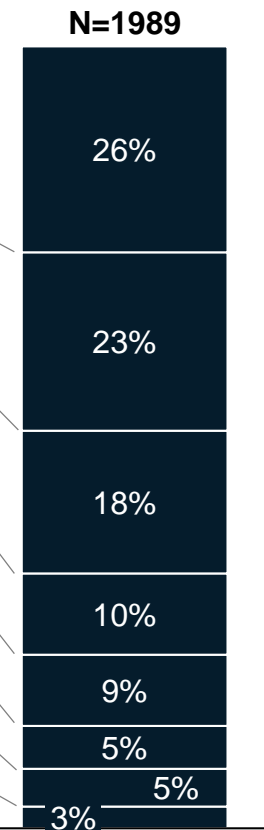
Arranging frequent cleaning and sanitizing of high touch points, equipment, common areas

Using health screenings for employees, such as temperature checks or questionnaires

Requiring employees to socially distance by 6 feet

Requiring employees to wear facemasks

Encouraging customers or visitors to use hand sanitizer upon entering the place of business



26% of customer-facing businesses/ organizations expressed that limiting capacity will be the most difficult to implement

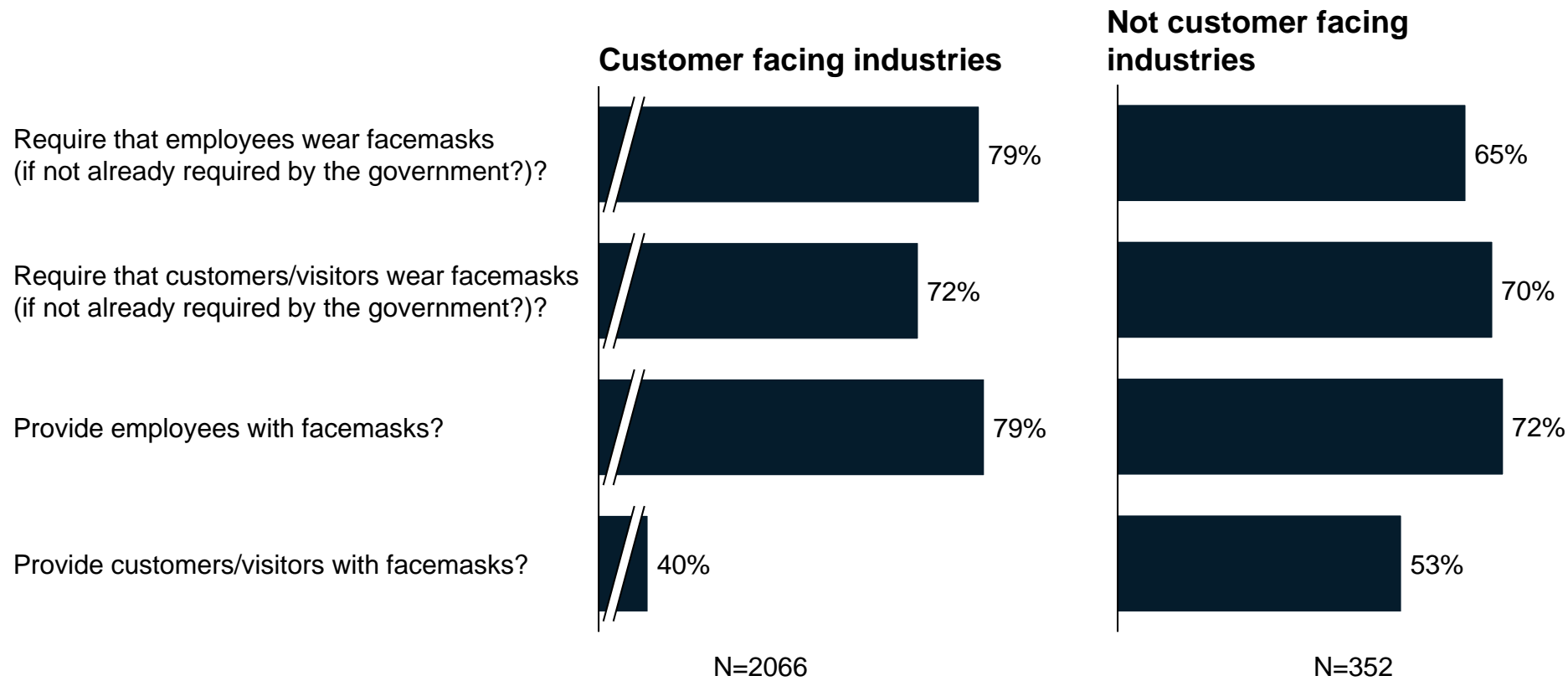
23% expressed that requiring social distancing will be the most difficult to implement

Q40: Thinking about the following safety measures that might be put in place as you re-open at whatever capacity level is permitted by the state...Which one will be the MOST difficult to implement? / Customer-facing: report that at least 1-10% of their employees interact with customers on a regular basis

The vast majority of survey respondents plan to require that employees wear facemasks and will provide them

Survey respondents plans for requiring and providing facemasks to employees and customers

% of responses respondents who responded "yes" to each question



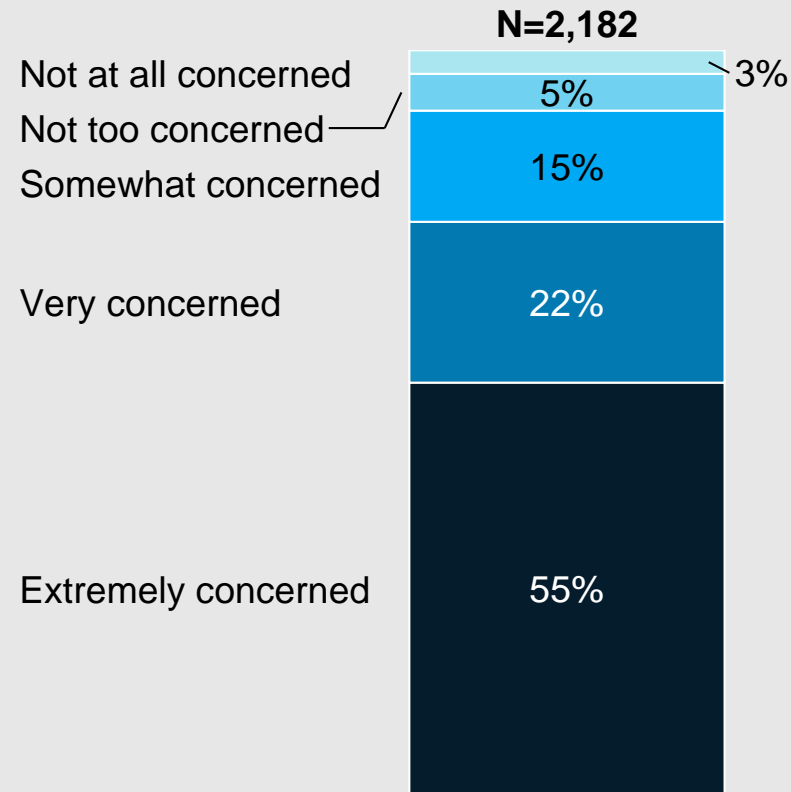
Customer-facing businesses/ organizations will largely require customers wear facemasks, but are less likely to provide them.

Q42, Q43: In your place of business/organization, are you planning to...

Customer-facing: report that at least 1-10% of their employees interact with customers on a regular basis

3 of 4 respondents
(77%) are **extremely or very concerned about a second wave of the virus and potential closures of businesses**

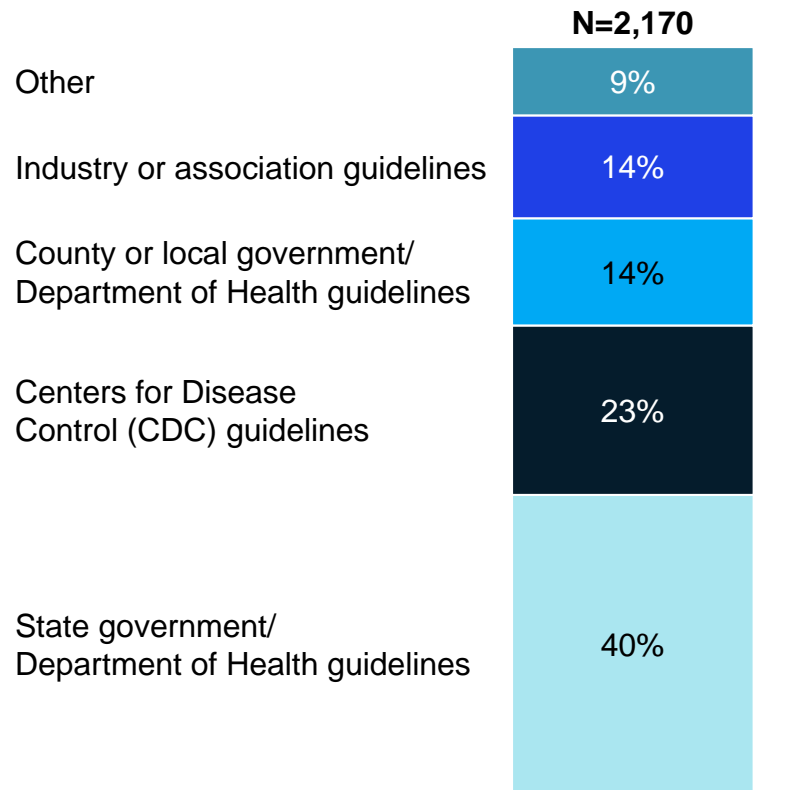
Respondent concern for effects of COVID-19 resurgence
% of responses



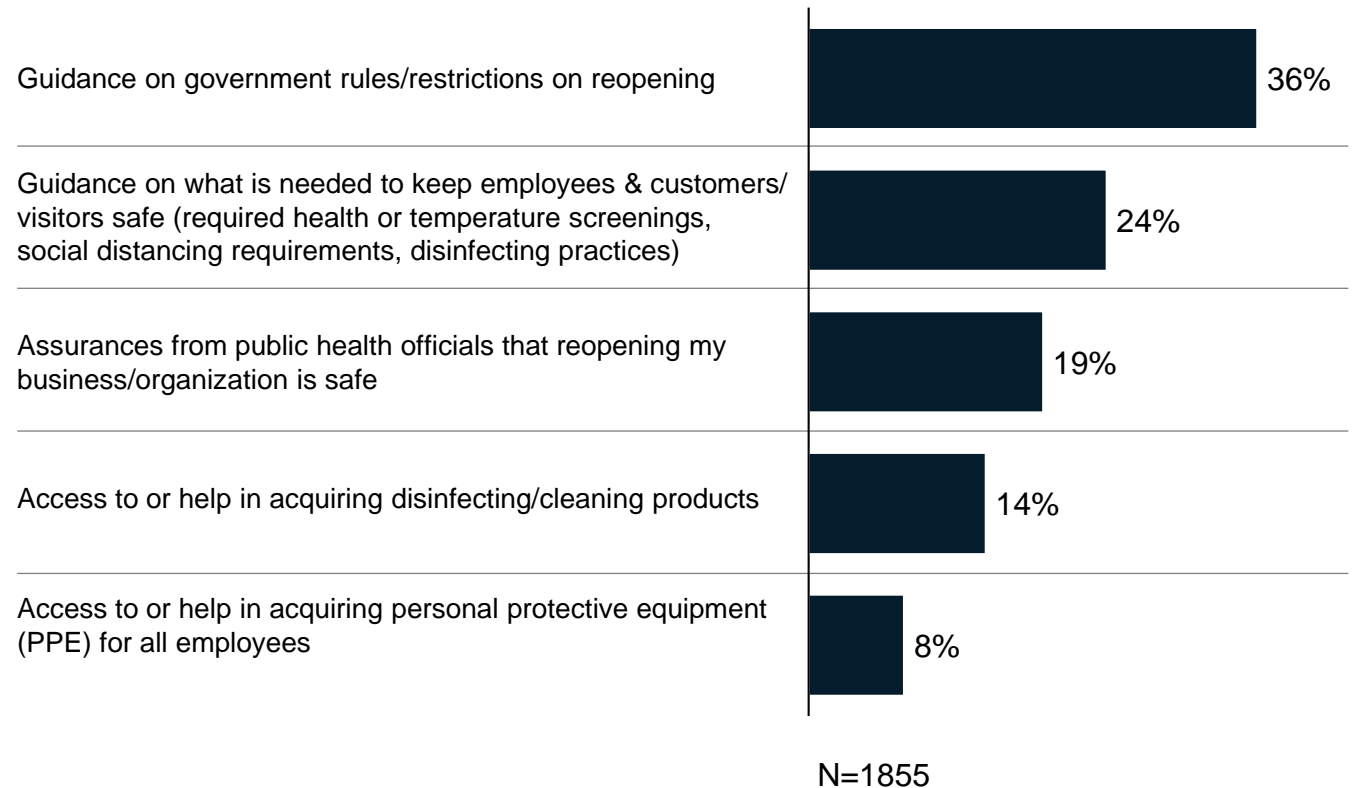
Q35: How concerned are you that state or local officials will order your business to close again due to a second wave/ increase in virus infections?

40% of respondents report that the NJ government/ DOH is the most important source for re-opening guidance – indicating a need for state safeguarding guidance

Q36: When making decisions about re-opening, which of the following sources of guidance on workplace health and safety are you MOST likely to rely upon in making decisions for your business or organization?, % of respondents



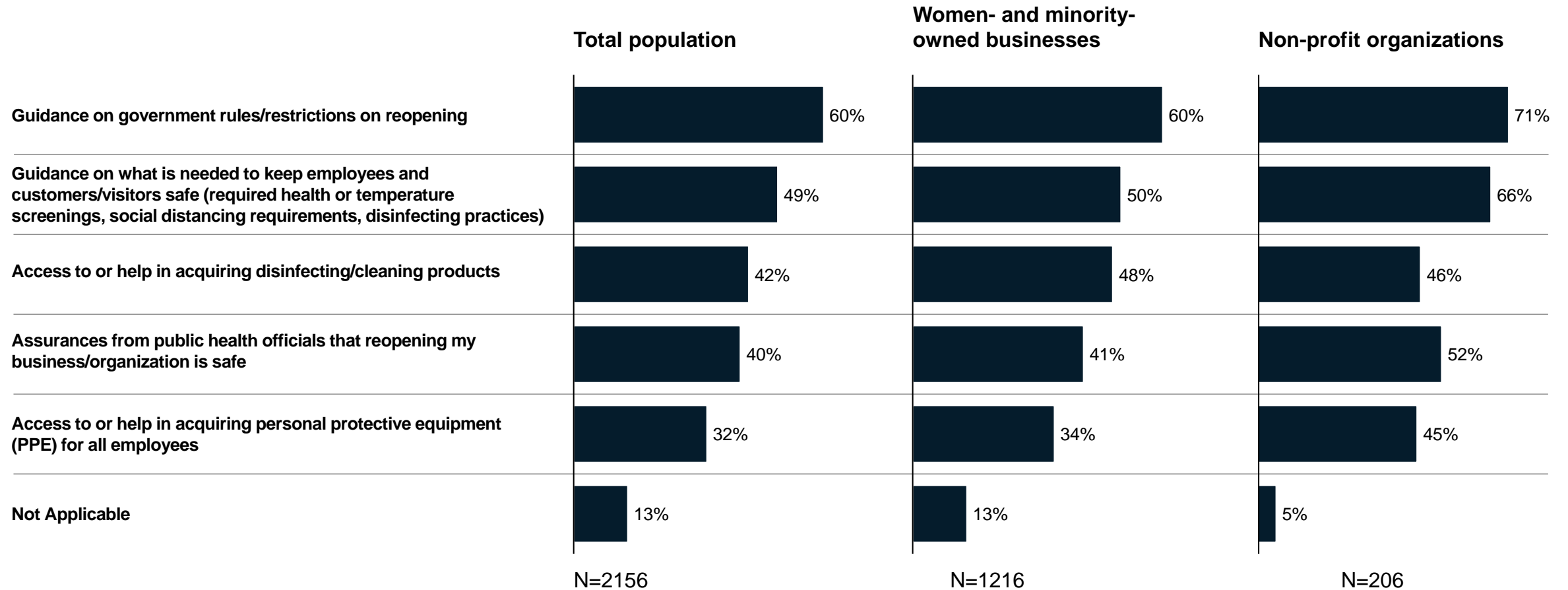
Q38: Most important support needed from state and local government
% of respondents



The primary need from state and local governments to reopen is guidance on government rules and restrictions

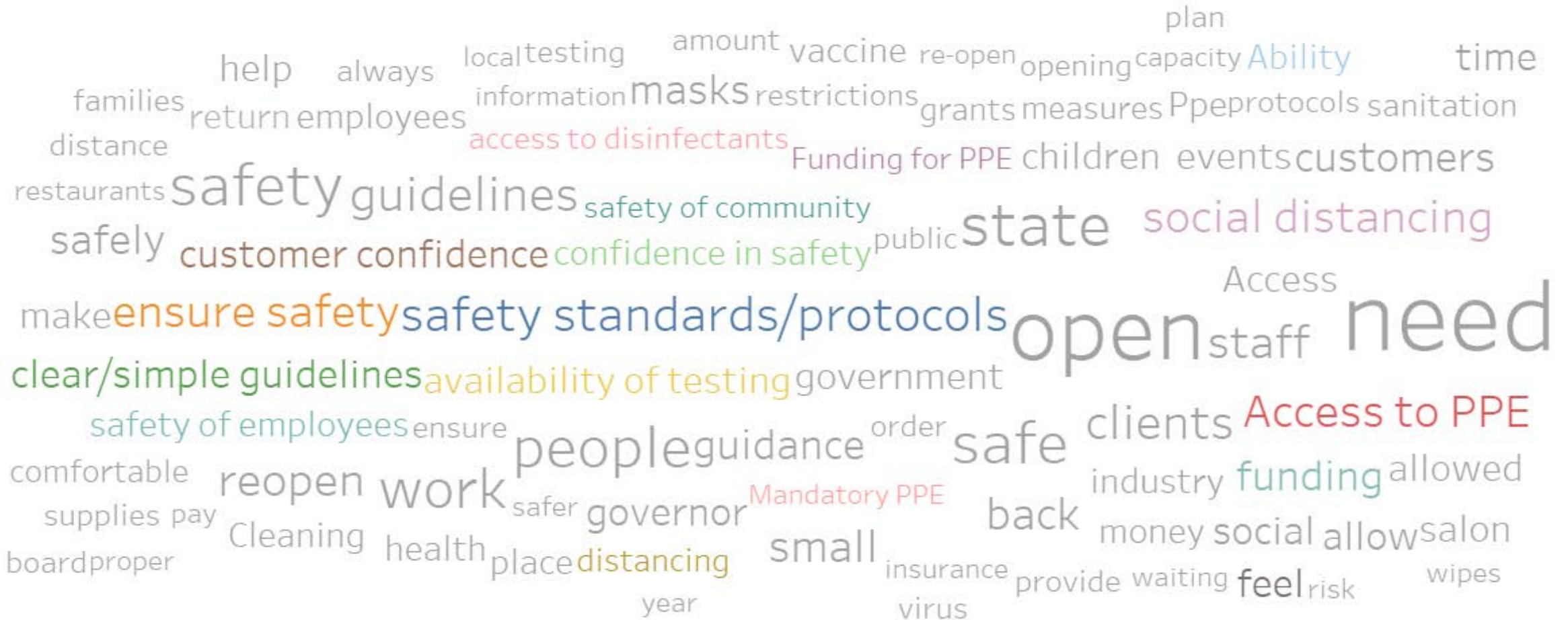
Needs from state and local government to reopen

% of responses, not mutually exclusive



Q37: Thinking about safety, what do you need from state and local government officials as you re-open? Check all that apply

Survey respondents also indicate that they need support for customer confidence, a clear reopening timeline and facts about the pandemic



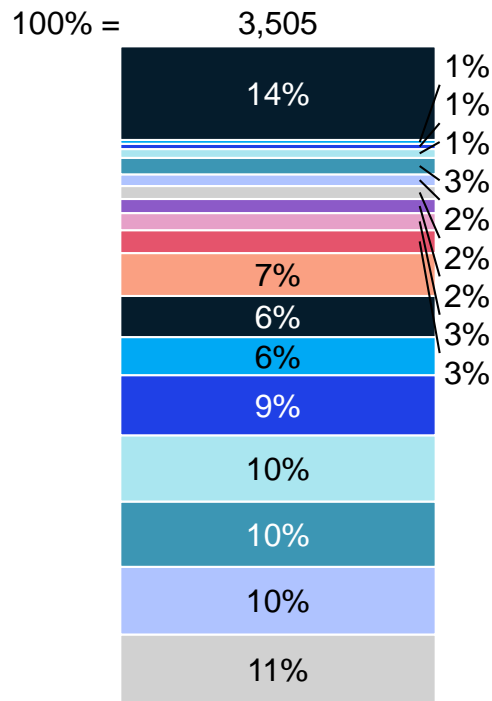
Q26: In a few words...What else is important to you to enable your business/organization to re-open safely?

N = 1,739

The survey population roughly mirrors the NJ population of employers by industry, though it oversamples: personal services, arts & recreation, and non-profit organizations

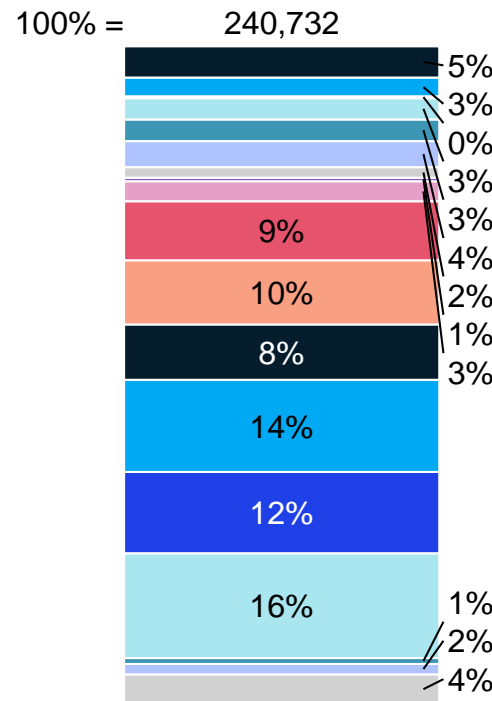
Q51: Employers surveyed by industry

% of responses



New Jersey employers by industry

% of NJ employers



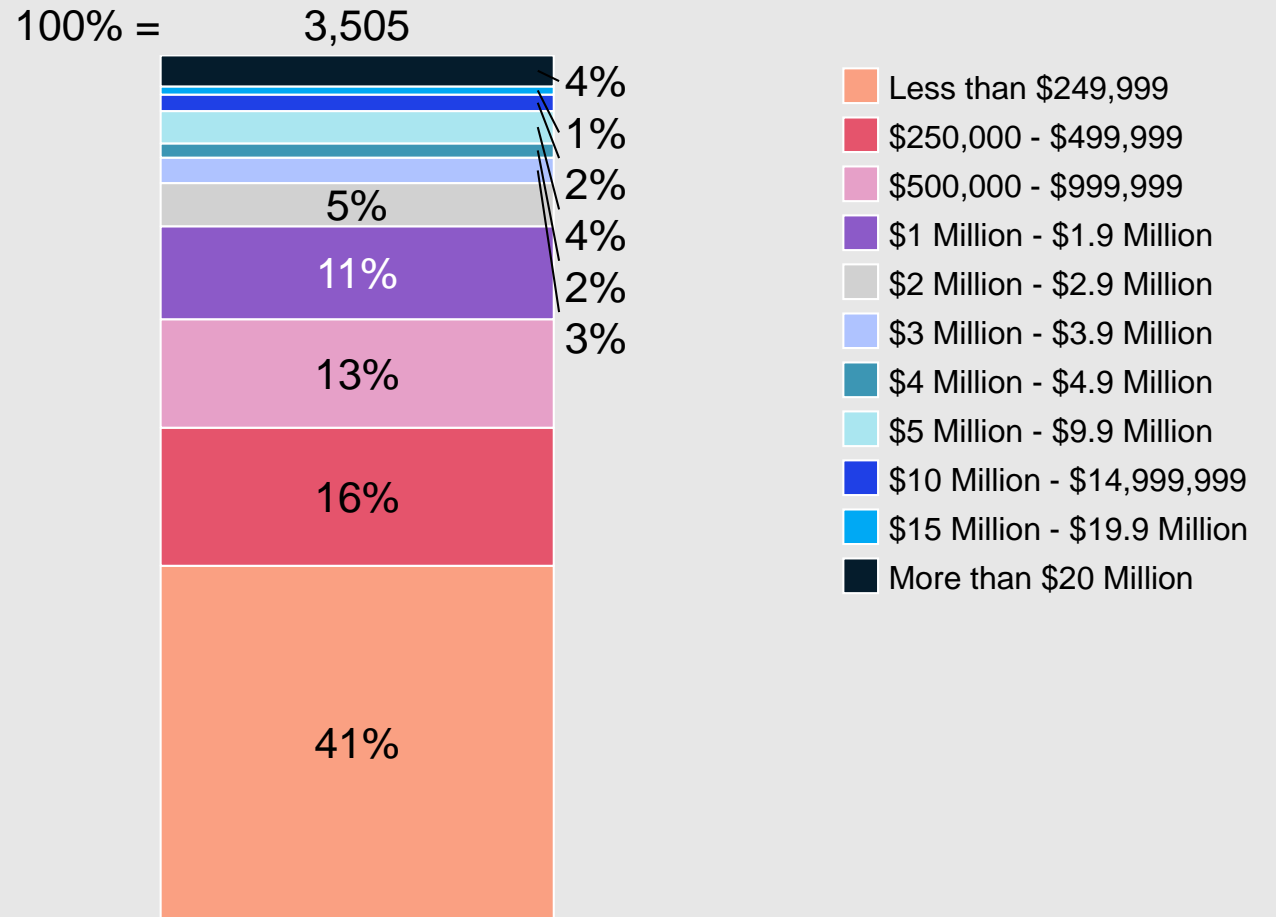
- Other
- Grocery, convenience store
- Warehousing and distribution
- Banking/finance
- Trade, Transportation, Utilities
- Real Estate
- Technology
- Tourism/Lodging/Hospitality/Leisure
- Manufacturing
- Construction
- Healthcare
- Restaurant/bar/catering
- Education or child care
- Professional and business services
- Retail and wholesale
- Non-profit organization
- Arts and entertainment, recreation
- Personal services

~40% of respondents' organizations had less than \$250K in annual revenue in 2019

Q52: What was your organization's revenue in 2019?

Source: Rutgers University's Heldrich Center for Workforce Development NJ COVID-19 non-probability impact survey for businesses/ organizations; May 21, 2020 to June 3, 2020

Organization revenue, 2019
% of responses



As of June 5, the survey population roughly mirrors the total New Jersey population of woman- and minority-owned businesses

Q53: Employers surveyed who are women- and minority-owned businesses/ organizations

% of responses



New Jersey employers who are woman- and minority-owned business

% of NJ employers



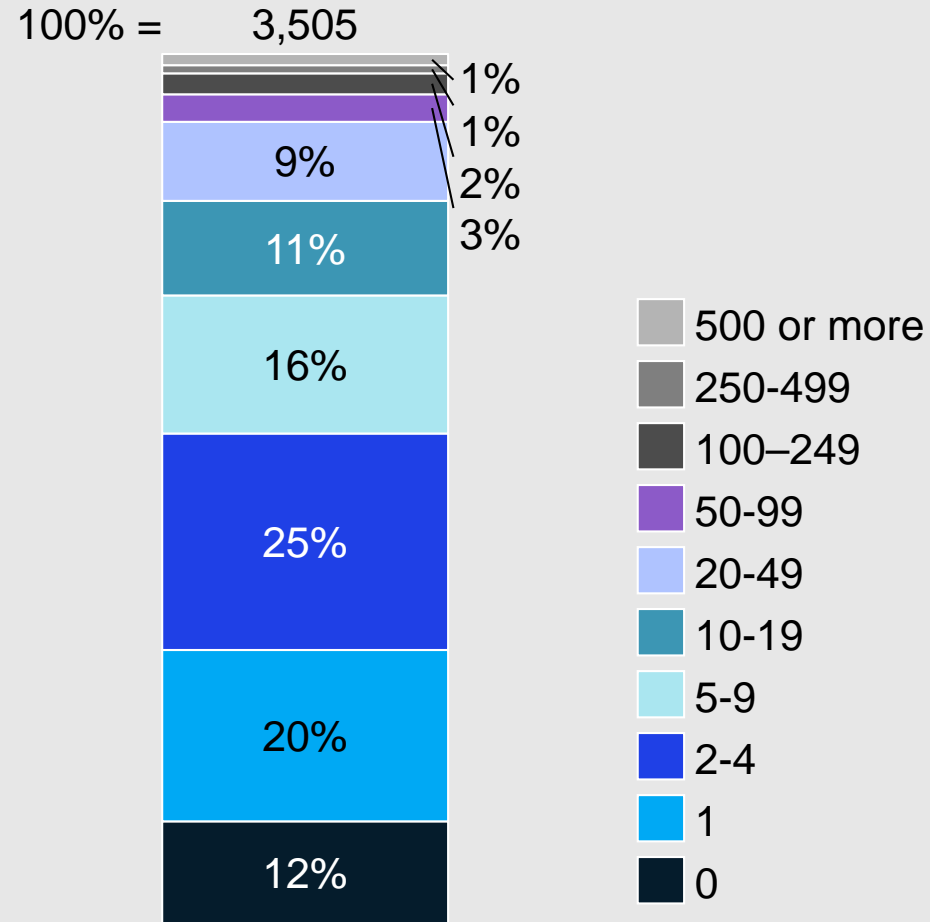
Source: Rutgers University's Heldrich Center for Workforce Development NJ COVID-19 non-probability impact survey for businesses/ organizations; May 21, 2020 to June 3, 2020; US Census Statistics for All U.S. Firms by Industry, Gender, Ethnicity, and Race for the U.S., States, Metro Areas, Counties; 2012

Over 3/4 of respondents employ fewer than 20 full-time workers

Q54: How many full-time employees did your organization employ in New Jersey before the COVID-19 crisis?

Source: Rutgers University's Heldrich Center for Workforce Development NJ COVID-19 non-probability impact survey for businesses/ organizations; May 21, 2020 to June 3, 2020

Number of full-time employees
% of responses



Survey respondents are operating businesses/ organizations across the state

Q61: In which region do most of your New Jersey-based organization's operations take place? Select one response.

Source: Rutgers University's Heldrich Center for Workforce Development NJ COVID-19 non-probability impact survey for businesses/ organizations; May 21, 2020 to June 3, 2020

Primary location of operations % of responses

100% = 3,505

