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COVID-19 Impact on Nebraska Businesses: Nebraska Business Response Survey Report Round 1

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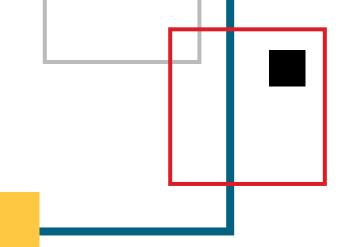
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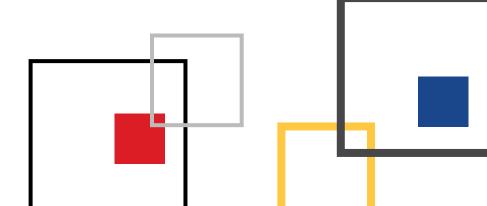
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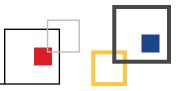


COVID-19 IMPACT ON NEBRASKA BUSINESSES

NEBRASKA BUSINESS RESPONSE SURVEY REPORT



SPONSORS



NEBRASKA

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REPORT PREPARED BY

Josie Schafer, director, UNO Center for Public Affairs Research Tara Grell, graphic designer, UNO Center for Public Affairs Research Melanie Kiper, community service specialist, UNO Center for Public Affairs Research The State of Nebraska, the Nebraska Chamber of Commerce, the University of Nebraska and several local project partners came together to develop and share the Nebraska Business Response Survey to understand the impact coronavirus (COVID-19) is having on the revenue and workforce of organizations across the state and find the best ways to support our business and nonprofit community during this crisis.

The survey launched Wednesday, April 15, 2020, at 2 P.M. and closed Friday, April 24, 2020, at 5 P.M. The survey was only made available online and in English and Spanish. The survey was translated into Spanish by Lissette Aliaga-Linares, Ph.D., assistant professor of sociology and anthropology at the University of Nebraska at Omaha. The survey was distributed by email invitation from survey partners to their organization's associates and publicly announced at a press conference by Pete Ricketts, Governor of the State of Nebraska.

After the first 100 responses were received, a real-time, publicly available summary of each question response was made available at cpar.unomaha.edu\nebusinessresults. The summary report can still be accessed at that website. A series of reports using the survey data will be made available throughout May of 2020. This report provides an executive summary for the survey and analysis of quantitative survey questions by industry and by regions in Nebraska. The regions are based on zip codes in community college districts. An additional region was created in the area of the City of Lincoln due to the high number of responses.

First, the survey results can only represent the views of those that responded during the 10 days that the survey was open. We recognize that the current global pandemic is rapidly evolving and thus viewpoints may evolve as well. Second, not all respondents answered all questions. Thus, the percentages and the number of respondents are given for most data points in the report and do vary across questions. Finally, in some places results may not add up to 100% due to rounding.

Questions about the data and analysis of the survey can be directed to: Josie Gatti Schafer, Ph.D., director, Center for Public Affairs Research University of Nebraska at Omaha jgschafer@unomaha.edu

Questions about survey development or future surveys on this topic can be directed to: Catherine Lang, state director, Nebraska Business Development Center <u>cdlang@unomaha.edu</u>

EXECUTIVE SUMMARY

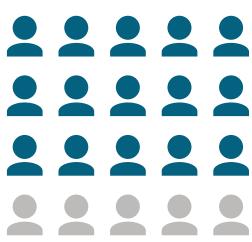


7,649

the survey

5,785

completed more than 45% of the survey



Largest Industry Sectors Represented

15.2% (696)



Other Services

 (includes automotive repair and services, equipment repair, barber/beauty shops, funeral services, dry cleaning, churches and religious organizations, civic and social organizations, business and professional associations, and labor union organizations)

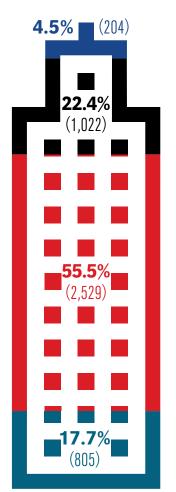


9.8% (448)



Retail Trade

Most Respondents Were Small Businesses



250 to 1,000 or more employees

20 to 249 employees

1 to 19 employees

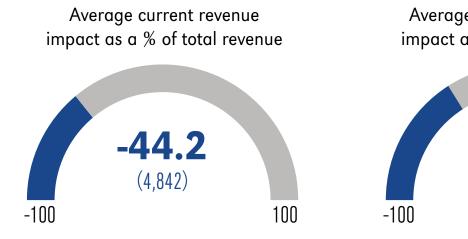
No employees other than the sole proprietor



Industries that report the largest negative impacts from coronavirus (COVID-19)



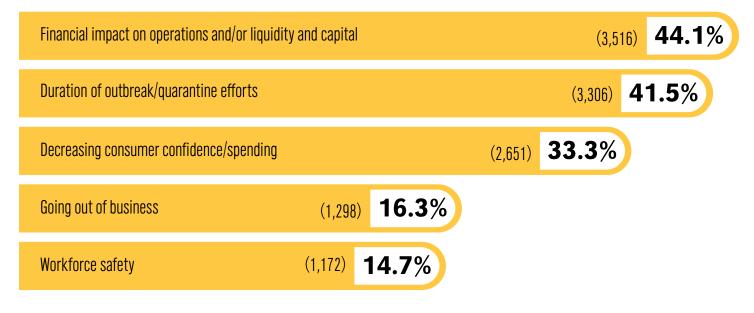
Respondents report negative revenue and employment impacts as a result of coronavirus (COVID-19)



Average current employment impact as a % of all employees



Respondents top concerns with respect to the coronavirus (COVID-19)



Most organizations have placed some restrictions on employees (51%, 2,873) and the public (71%, 4,027) from entering their workplaces



49.9%

The average percent of the workforce that is able to work remotely

of businesses are **considering or currently applying for any federal programs** (for example, capital or employment assistance from the Small Business Administration) as a result of the coronavirus (COVID-19). *The United States Small Business Administration's Payroll Protection Program (PPP) is the most common program being considered.

Will you need help applying for any federal business support programs?



(3,713)

66%

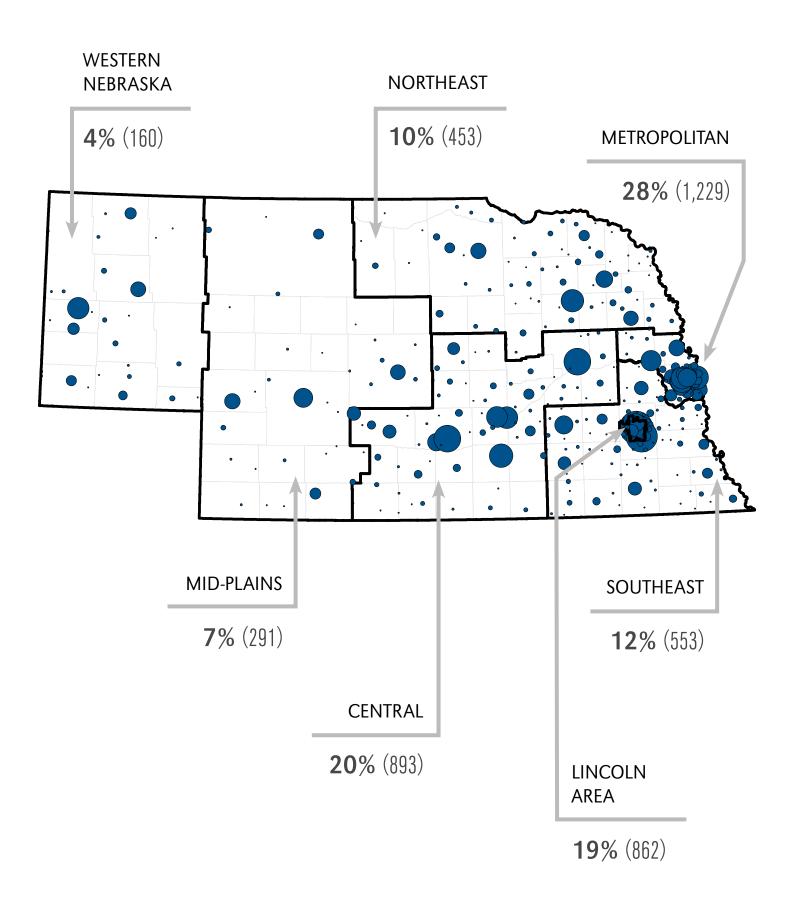


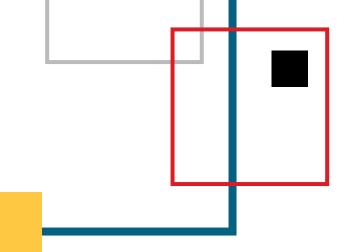




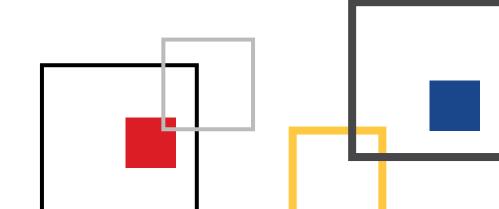




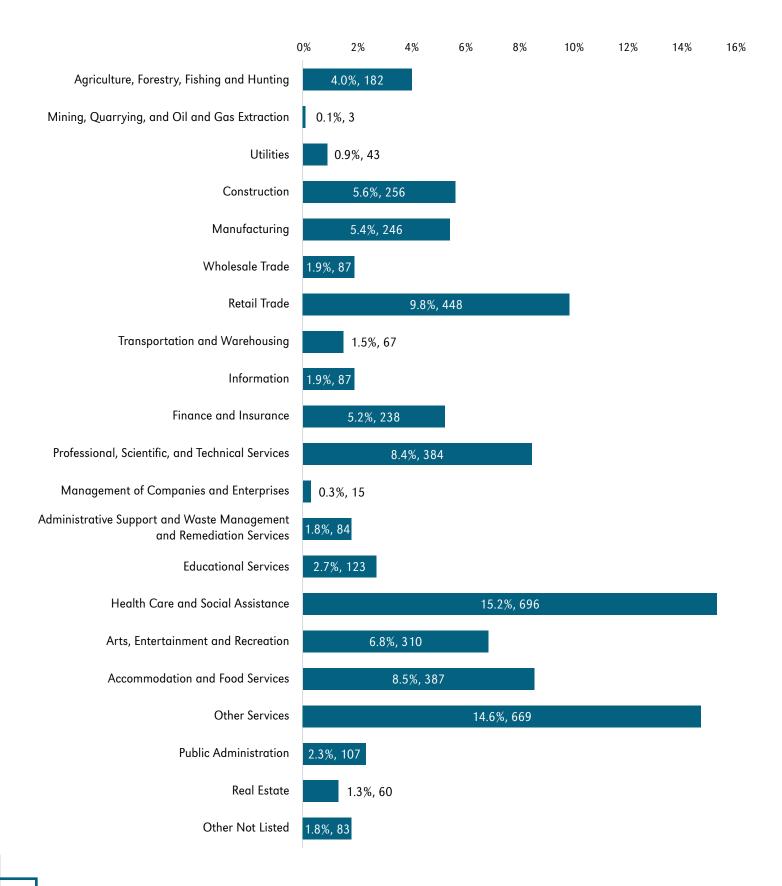




INDUSTRY REPORT

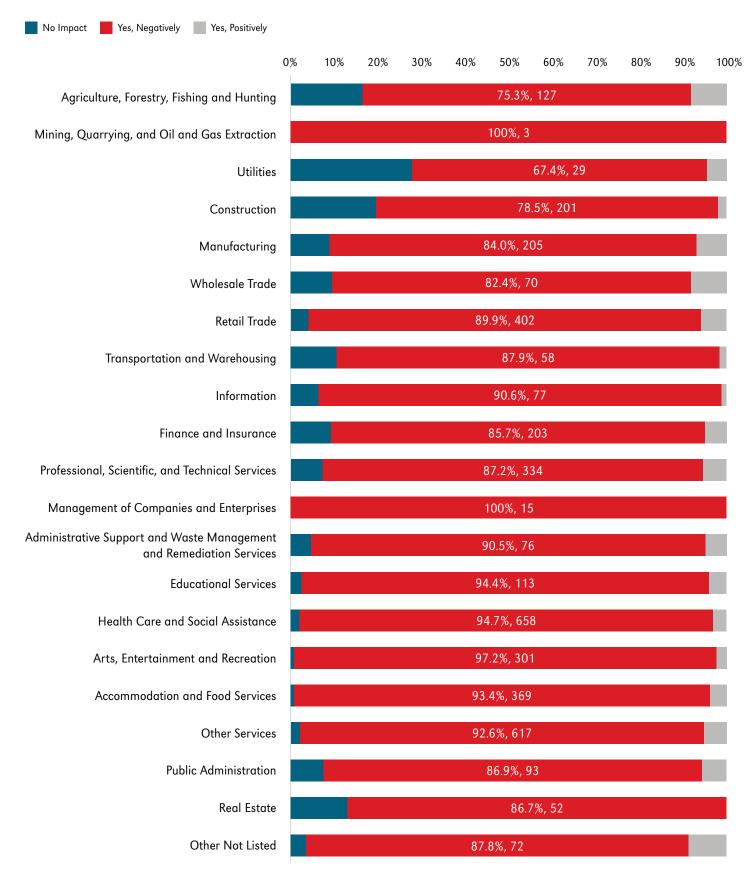


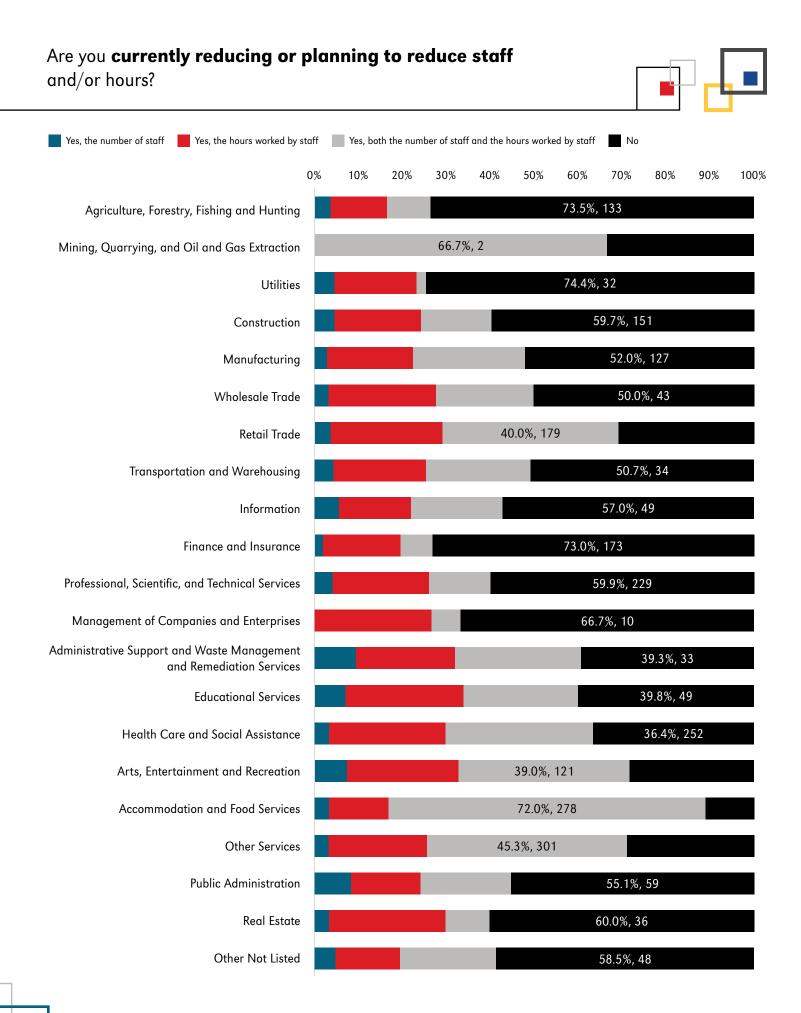


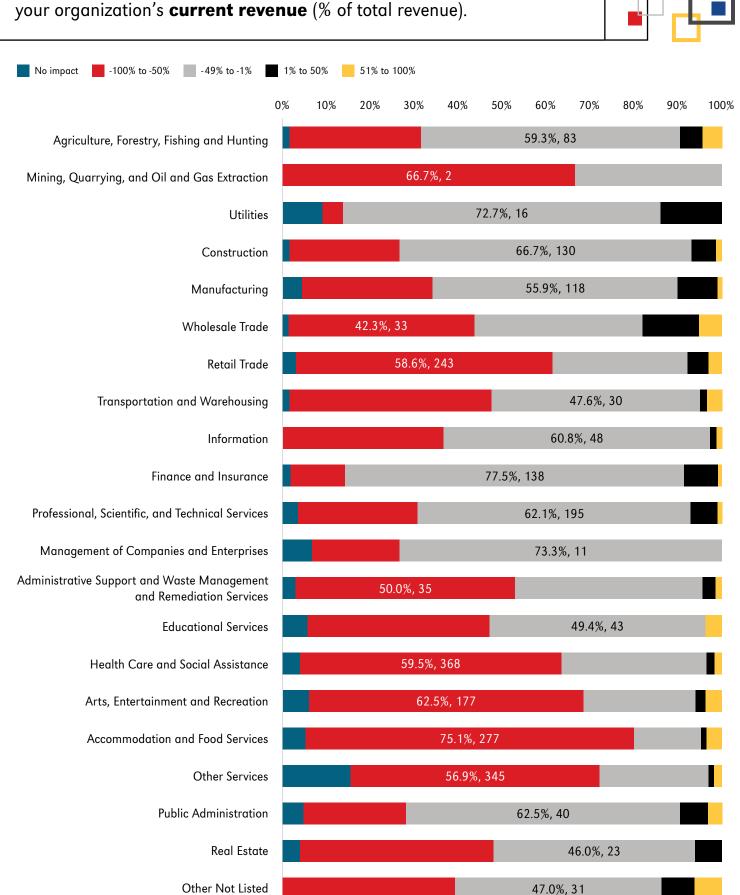


Has the recent outbreak of the coronavirus (COVID-19) directly **impacted your organization**?







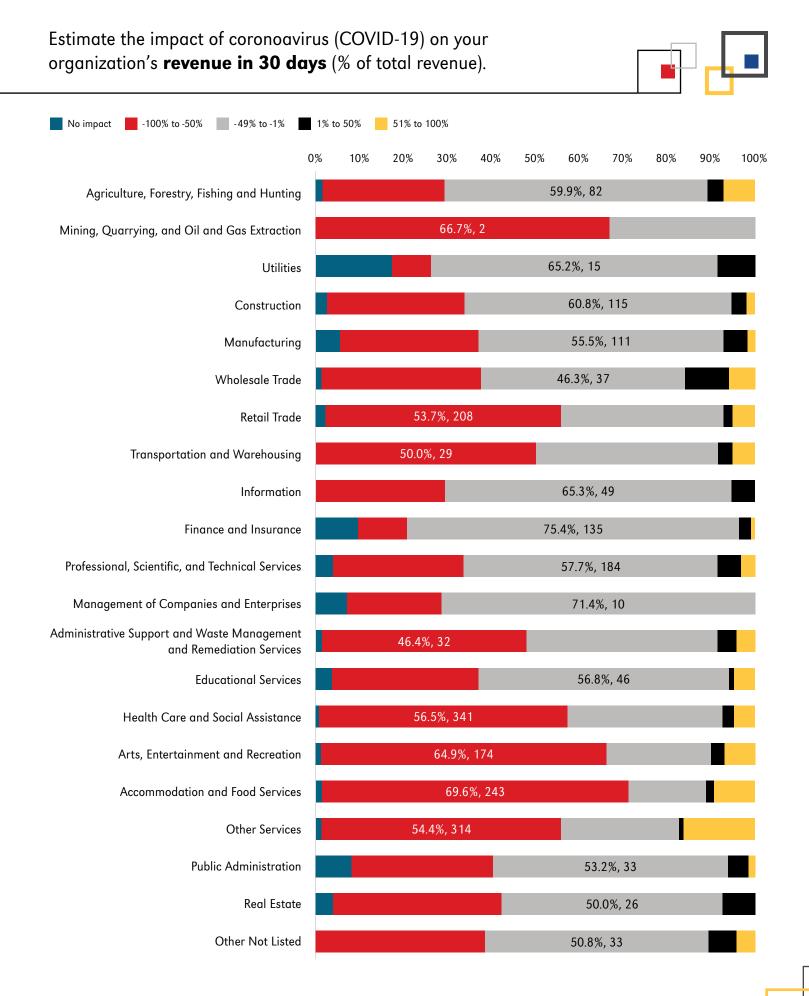


Estimate the impact the coronavirus (COVID-19) is having on your organization's **current revenue** (% of total revenue).

Estimate the impact the coronavirus (COVID-19) is having on your organization's **current employment** (% of all employees).

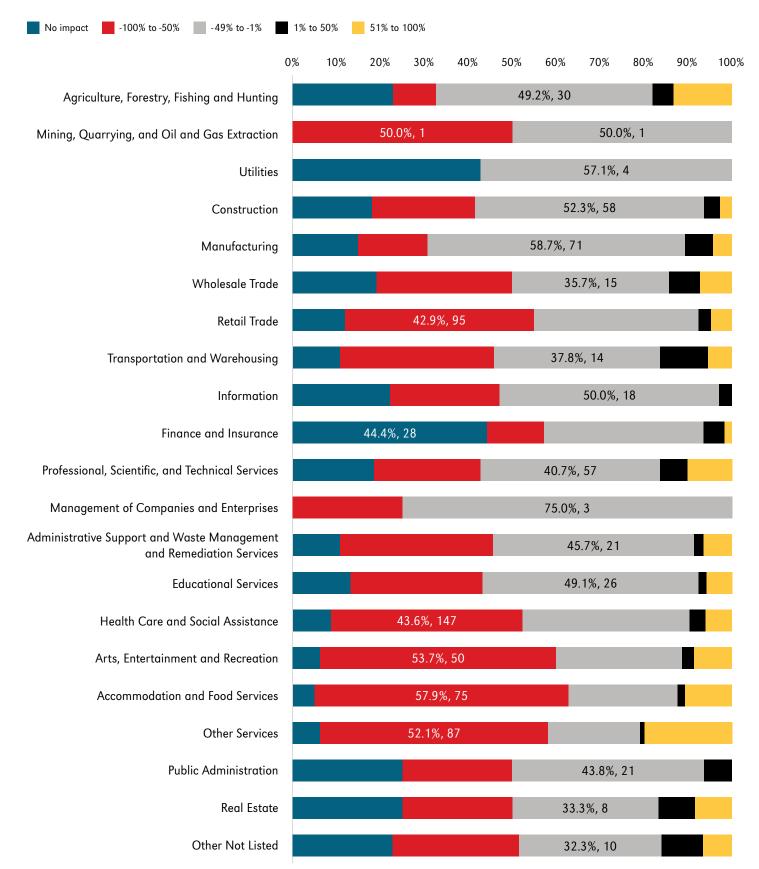


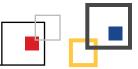
No impact -100% to -50% -49% to -1%	1% to	50%	51% to	100%							
	0%	10%	20%	30%	40%	50%	60%	70%	80%	90%	100%
Agriculture, Forestry, Fishing and Hunting					54	.0%, 34					
Mining, Quarrying, and Oil and Gas Extraction		50.0%, 1						50.0	0%,1		
Utilities						4	45.5%, 5				
Construction		62.1%, 72									
Manufacturing		62.8%, 76									
Wholesale Trade		58.1%, 25									
Retail Trade		44.7%, 127									
Transportation and Warehousing		54.3%, 19									
Information		54.1%, 20									
Finance and Insurance							47.8%	, 33			
Professional, Scientific, and Technical Services		52.1%, 73									
Management of Companies and Enterprises		60.0%, 3									
Administrative Support and Waste Management and Remediation Services		53.2%, 25									
Educational Services							60.6%,	40			
Health Care and Social Assistance			44.9%	6, 182							
Arts, Entertainment and Recreation				55.0%, 1	105						
Accommodation and Food Services				64.5%, 2	211						
Other Services			5	2.8%, 242	2						
Public Administration						63.3	3%, 31				
Real Estate				32.0	0%, 8						
Other Not Listed					Ę	50.0%, 1	6				



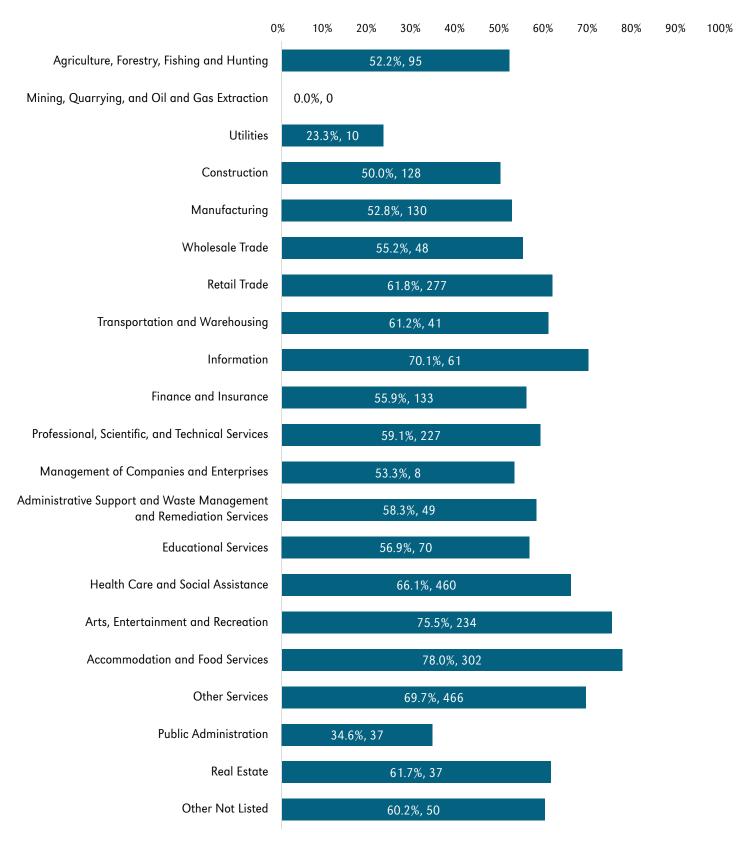
Estimate the impact of coronoavirus (COVID-19) on your organization's **employment in 30 days** (% of total all employees).







1/5: Financial impact on operations and/or liquidity and capital





0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100% Agriculture, Forestry, Fishing and Hunting 47.3%, 86 Mining, Quarrying, and Oil and Gas Extraction 100%, 3 Utilities 60.5%, 26 Construction 52.7%, 135 Manufacturing 51.6%, 127 Wholesale Trade 50.6%, 44 **Retail Trade** 52.0%, 233 Transportation and Warehousing 64.2%, 43 Information 58.6%, 51 Finance and Insurance 55.5%, 132 Professional, Scientific, and Technical Services 58.9%, 226 Management of Companies and Enterprises 60.0%, 9 Administrative Support and Waste Management 46.4%, 39 and Remediation Services **Educational Services** 69.9%, 86 64.8%, 451 Health Care and Social Assistance Arts, Entertainment and Recreation 71.6%, 222 Accommodation and Food Services 57.4%, 222 **Other Services** 61.3%, 410 **Public Administration** 60.7%, 65 **Real Estate** 61.7%, 37 Other Not Listed 61.4%, 51

2/5: Duration of outbreak/quarantine efforts

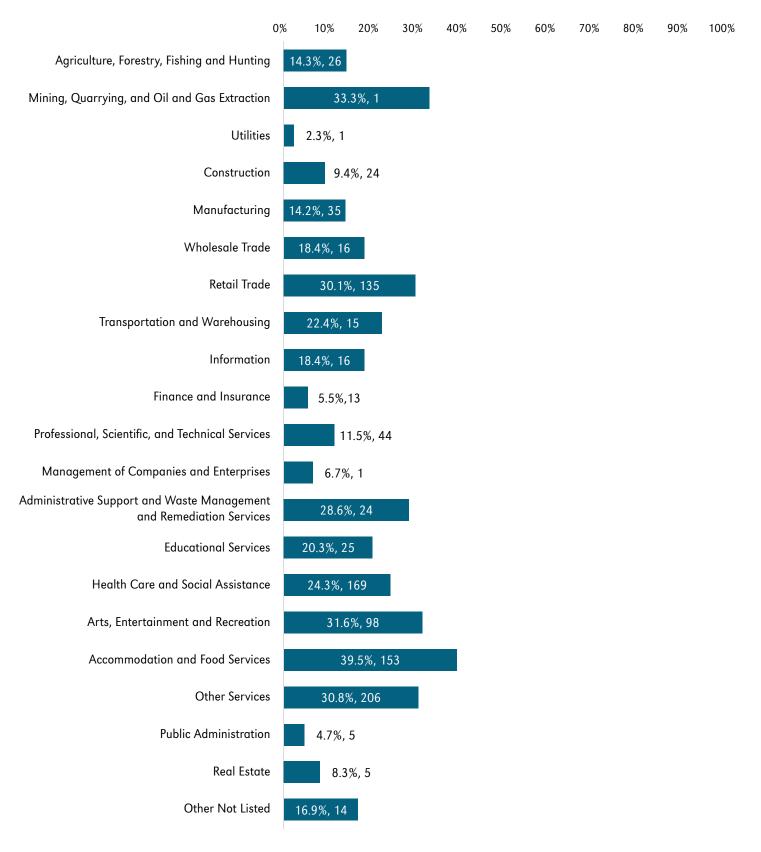


0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100% Agriculture, Forestry, Fishing and Hunting 41.8%, 477 Mining, Quarrying, and Oil and Gas Extraction 33.3%, 76 Utilities 37.2%, 1 Construction 60.9%, 16 Manufacturing 45.9%, 156 Wholesale Trade 55.2%, 113 **Retail Trade** 64.5%, 48 Transportation and Warehousing 38.8%, 289 Information 57.5%, 26 Finance and Insurance 54.2%, 50 Professional, Scientific, and Technical Services 52.1%, 129 Management of Companies and Enterprises 46.7%, 200 Administrative Support and Waste Management 45.2%, 7 and Remediation Services **Educational Services** 32.5%, 38 Health Care and Social Assistance 26.4%, 40 Arts, Entertainment and Recreation 60.6%, 184 Accommodation and Food Services 48.6%, 188 **Other Services** 46.6%, 188 **Public Administration** 35.5%, 312 **Real Estate** 68.3%, 38 Other Not Listed 41.0%, 41

3/5: Decreasing consumer confidence/spending

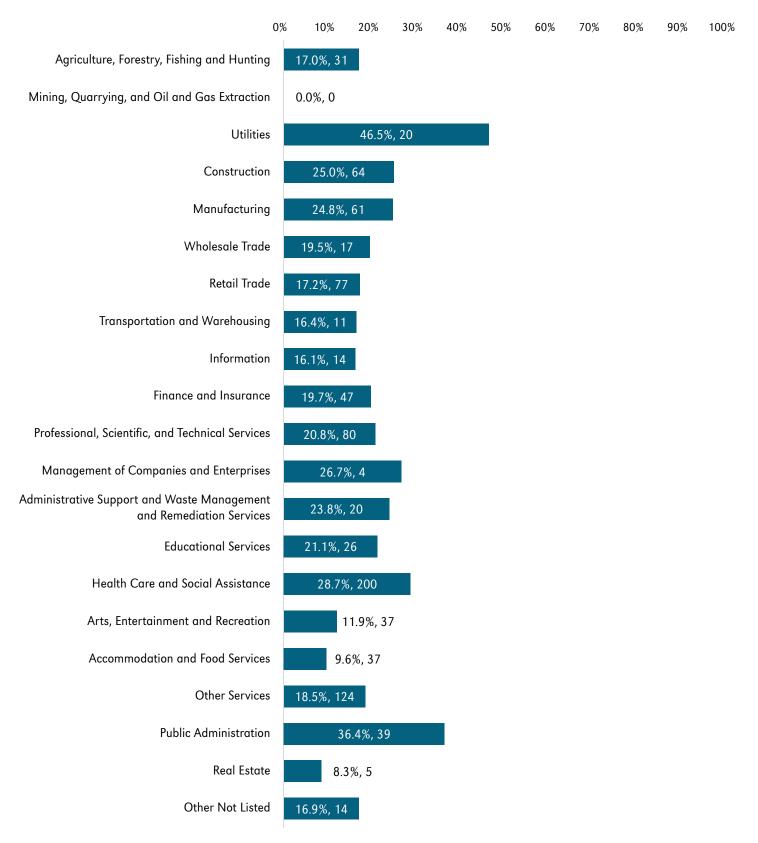


4/5: Going out of business





5/5: Workforce safety



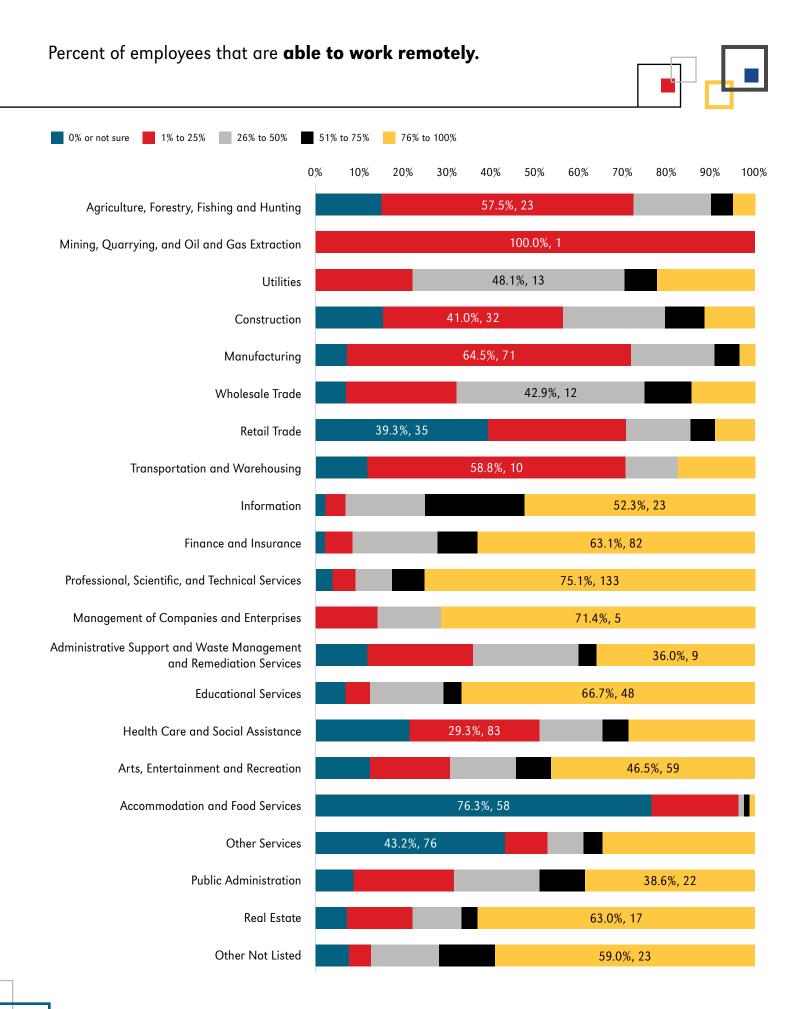


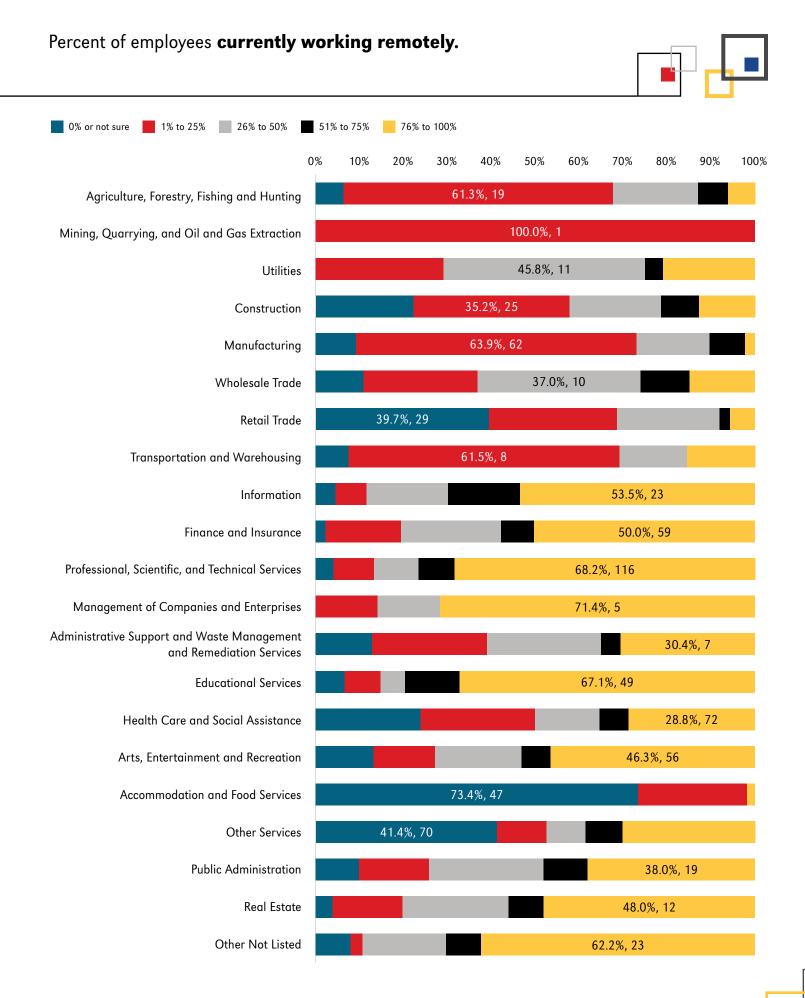
No Not Sure Not Applicable Yes 0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100% 46.2%, 84 Agriculture, Forestry, Fishing and Hunting 66.7%, 2 Mining, Quarrying, and Oil and Gas Extraction 86.0%, 37 Utilities 49.6%, 127 Construction 74.0%, 182 Manufacturing 56.3%, 49 Wholesale Trade 60.9%, 273 **Retail Trade** 47.8%, 32 Transportation and Warehousing 58.6%, 51 Information Finance and Insurance 85.3%, 203 Professional, Scientific, and Technical Services 60.7%, 233 73.3%, 11 Management of Companies and Enterprises Administrative Support and Waste Management 44.0%, 37 and Remediation Services 83.7%, 103 **Educational Services** 80.9%, 563 Health Care and Social Assistance 77.4%, 240 Arts, Entertainment and Recreation Accommodation and Food Services 80.9%, 313 78.8%, 527 **Other Services Public Administration** 86.9%, 93 **Real Estate** 66.7%, 40 Other Not Listed 62.7%, 52

Has your organization placed any restrictions on employees entering your physical work sites?



No Not Sure Not Applicable Yes 0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100% 50.0%, 91 Agriculture, Forestry, Fishing and Hunting 66.7%, 2 Mining, Quarrying, and Oil and Gas Extraction 72.1%, 31 Utilities 45.7%, 117 Construction 54.1%, 133 Manufacturing 43.7%, 38 Wholesale Trade **Retail Trade** 48.9%, 219 43.3%, 29 Transportation and Warehousing 50.6%, 44 Information Finance and Insurance 57.6%, 137 Professional, Scientific, and Technical Services 49.7%, 191 40.0%, 6 Management of Companies and Enterprises 40.0%, 6 Administrative Support and Waste Management 45.2%, 38 and Remediation Services 65.0%, 80 **Educational Services** 60.1%, 418 Health Care and Social Assistance 56.1%, 174 Arts, Entertainment and Recreation Accommodation and Food Services 43.2%, 167 57.8%, 387 **Other Services Public Administration** 62.6%, 67 56.7%, 34 **Real Estate** Other Not Listed 53.0%, 44





Are you considering **applying for any federal business support** programs as a result of the coronavirus (COVID-19)?



Yes Not Sure No 0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100% 62.6%, 112 Agriculture, Forestry, Fishing and Hunting 66.7%, 2 Mining, Quarrying, and Oil and Gas Extraction 55.8%, 24 Utilities 80.1%, 205 Construction 64.1%, 157 Manufacturing 69.8%, 60 Wholesale Trade 79.4%, 355 **Retail Trade** 68.7%, 46 Transportation and Warehousing 72.9%, 62 Information Finance and Insurance 48.1%, 114 Professional, Scientific, and Technical Services 72.9%, 280 Management of Companies and Enterprises 80.0%, 12 Administrative Support and Waste Management 72.6%, 61 and Remediation Services 51.2%, 63 **Educational Services** 72.8%, 505 Health Care and Social Assistance 68.7%, 213 Arts, Entertainment and Recreation Accommodation and Food Services 78.3%, 303 70.4%, 470 Other Services **Public Administration** 51.4%, 55 **Real Estate** 70.0%, 42 Other Not Listed 51.2%, 42

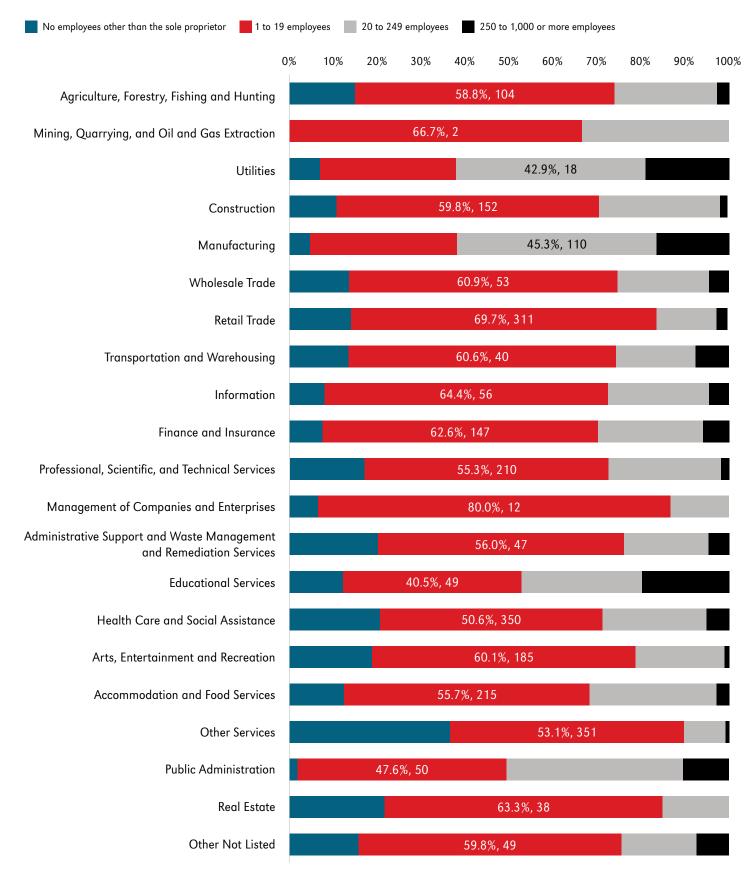
Will you **need support or advice** before applying for any federal business support programs?

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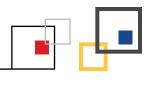
Yes No Not Sure 0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100% 47.1%, 64 Agriculture, Forestry, Fishing and Hunting 50.0%, 1 50.0%, 1 Mining, Quarrying, and Oil and Gas Extraction 47.4%, 9 Utilities 58.5%, 134 Construction 64.9%, 126 Manufacturing 56.9%, 41 Wholesale Trade **Retail Trade** 57.2%, 230 58.5%, 31 Transportation and Warehousing Information 56.8%, 42 Finance and Insurance 61.0%, 89 Professional, Scientific, and Technical Services 59.7%, 190 Management of Companies and Enterprises 76.9%, 10 Administrative Support and Waste Management 47.9%, 34 and Remediation Services 54.4%, 43 **Educational Services** 43.6%, 263 Health Care and Social Assistance Arts, Entertainment and Recreation 44.2%, 110 Accommodation and Food Services 51.1%, 179 Other Services 39.6%, 218 **Public Administration** 43.1%, 22 **Real Estate** 44.2%, 23 Other Not Listed 62.3%, 33

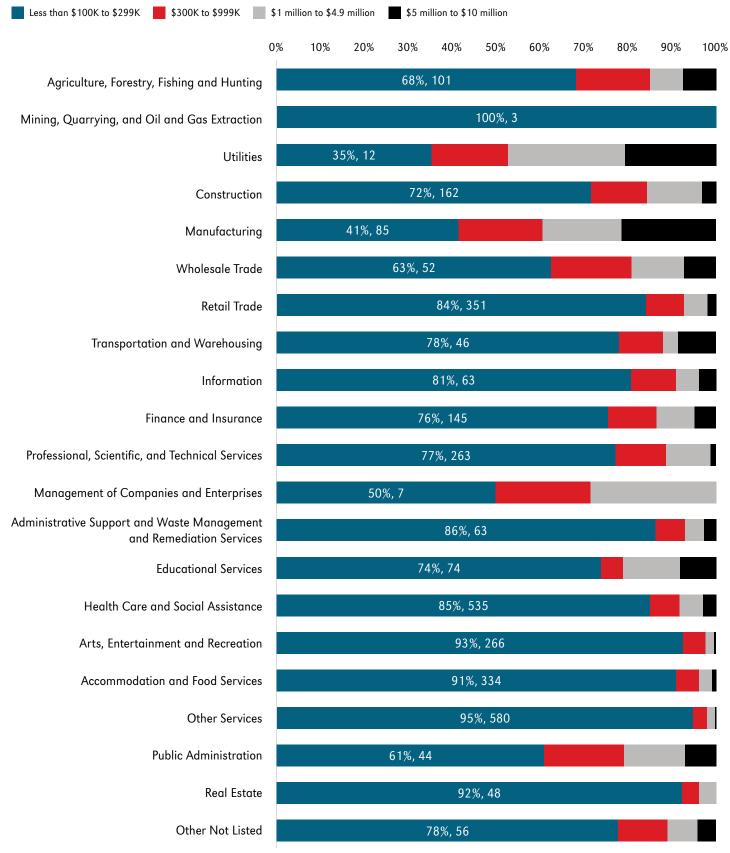
In February of 2020, what was your organization's total **monthly employment** at your main location?

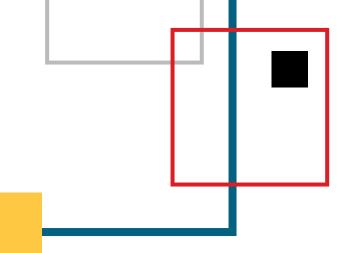




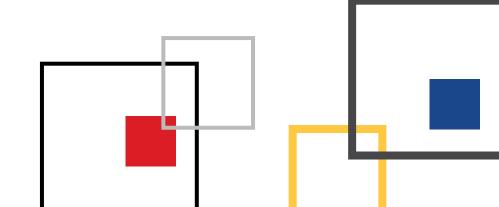
In February of 2020, what was your organization's **monthly revenue**?

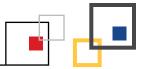


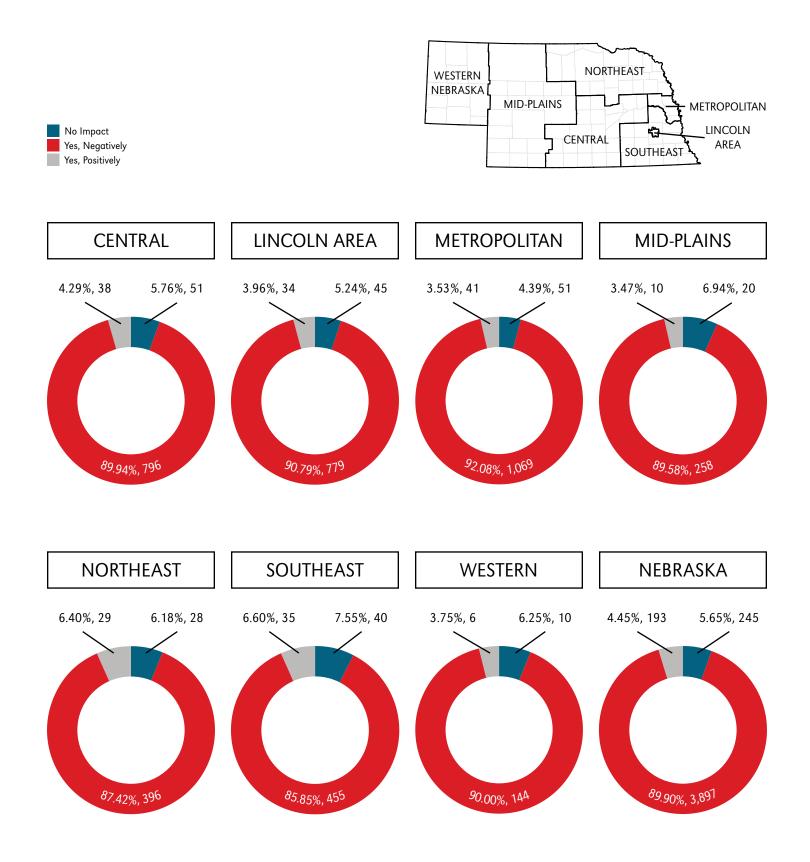




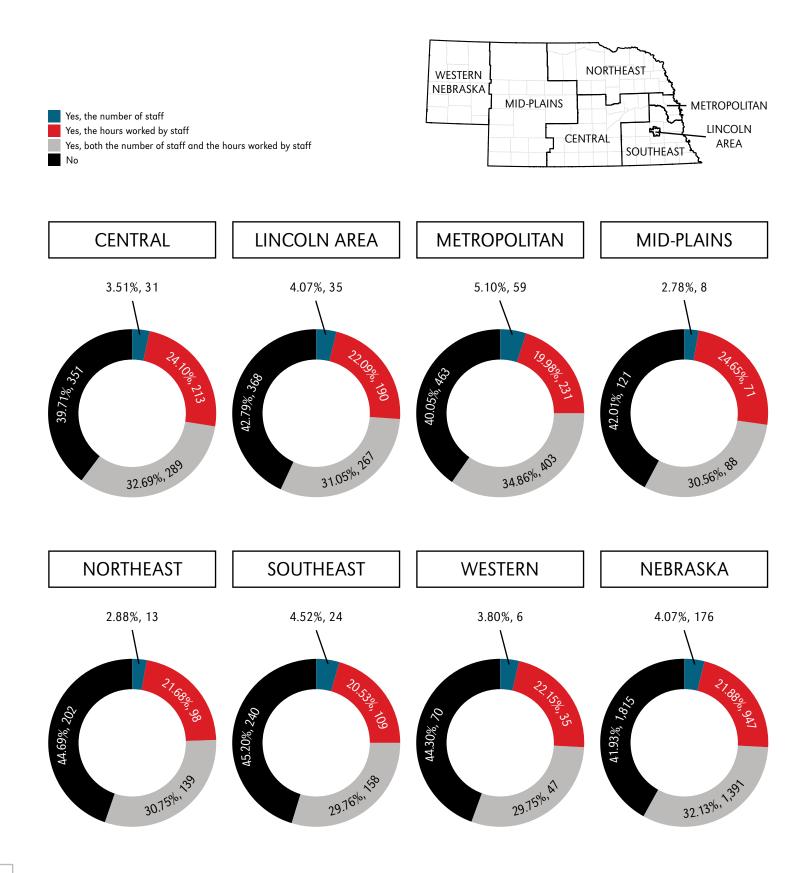
REGIONAL REPORT



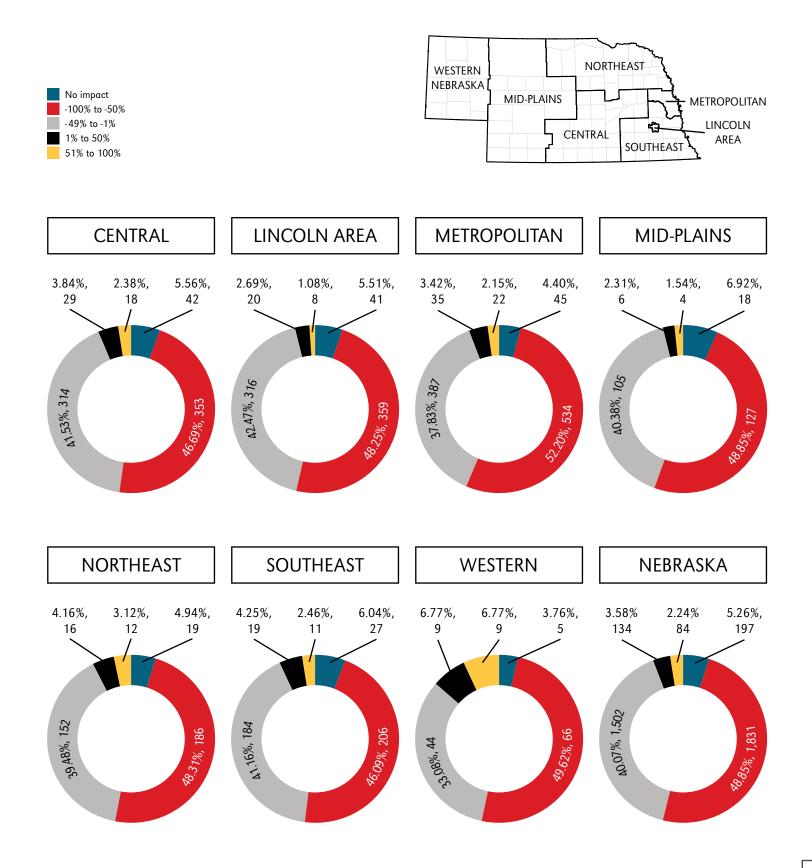




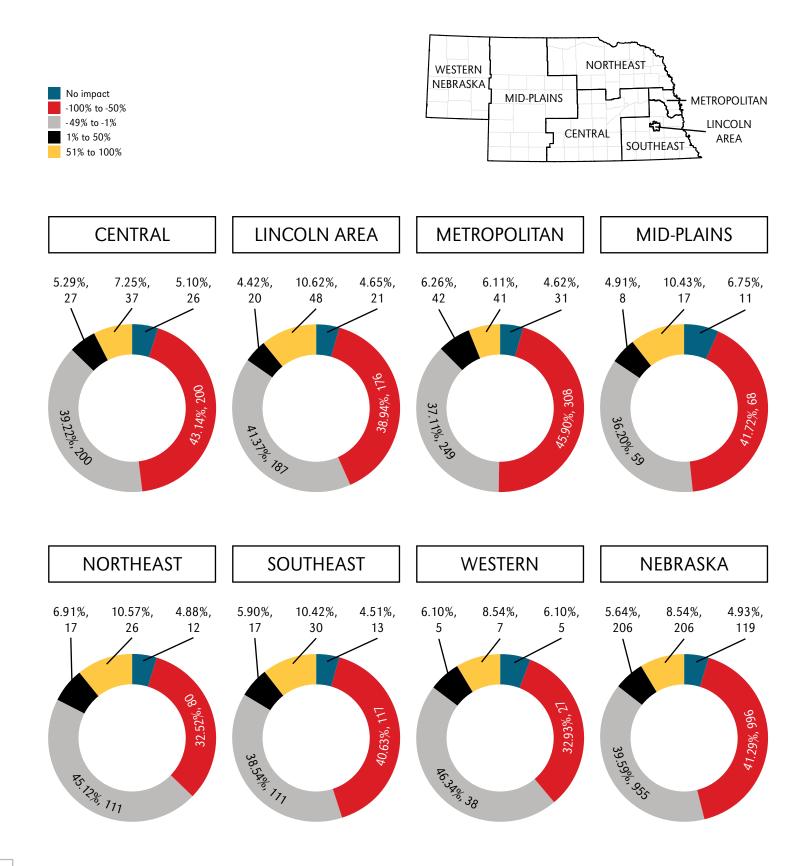






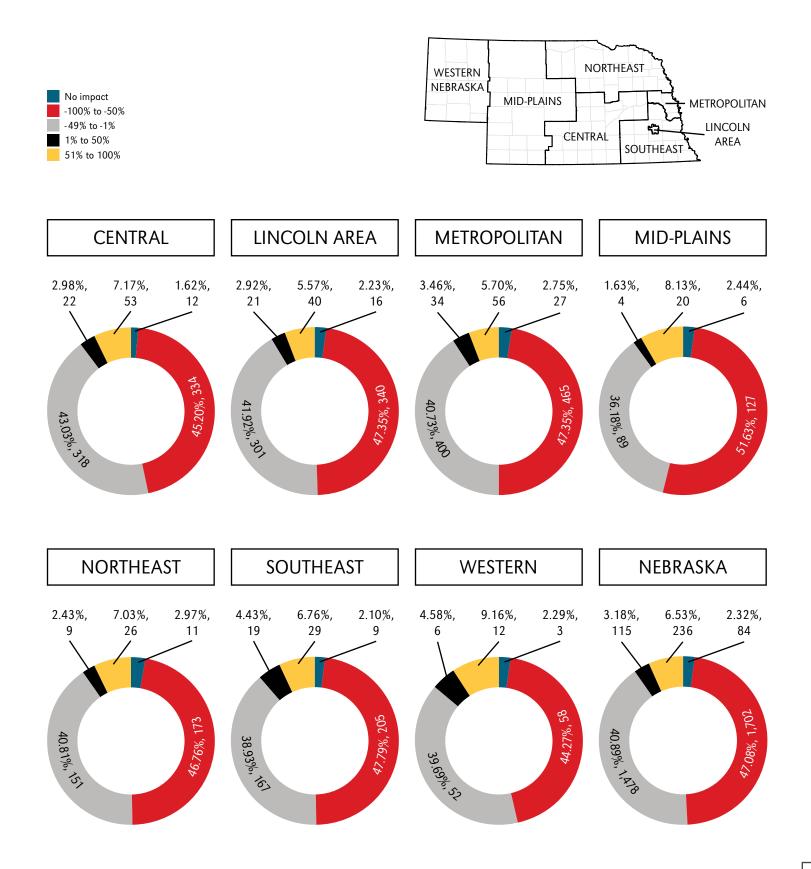




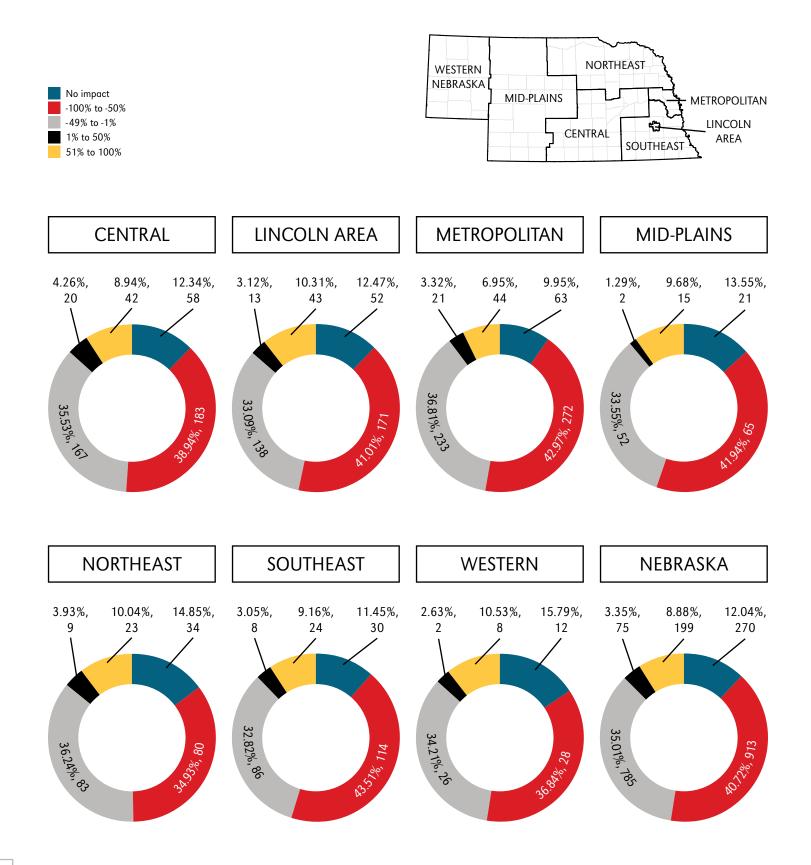


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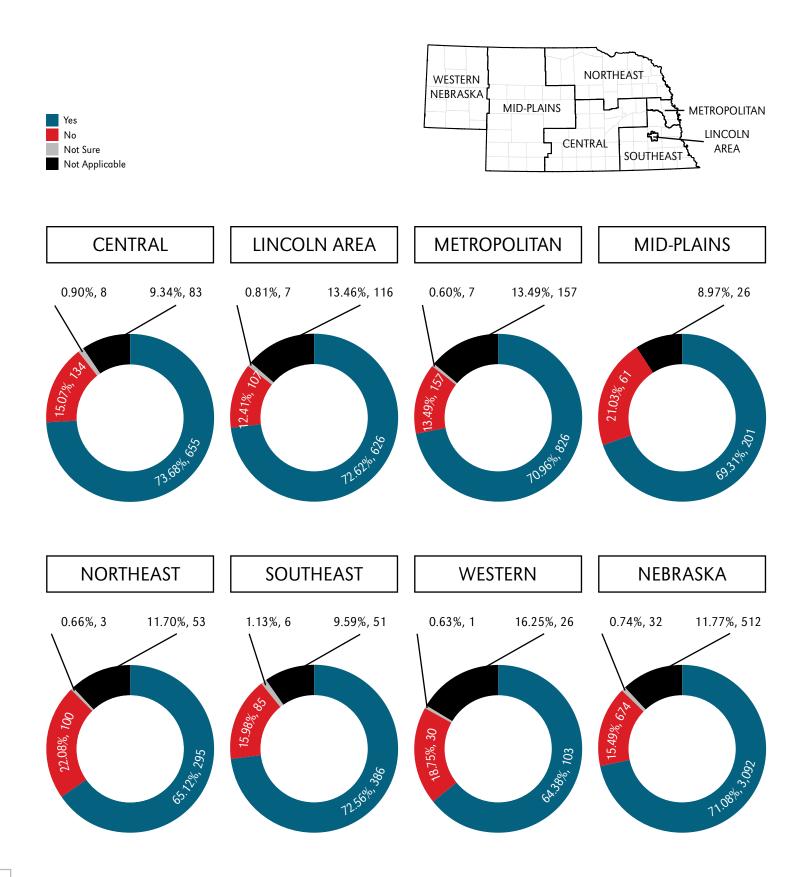




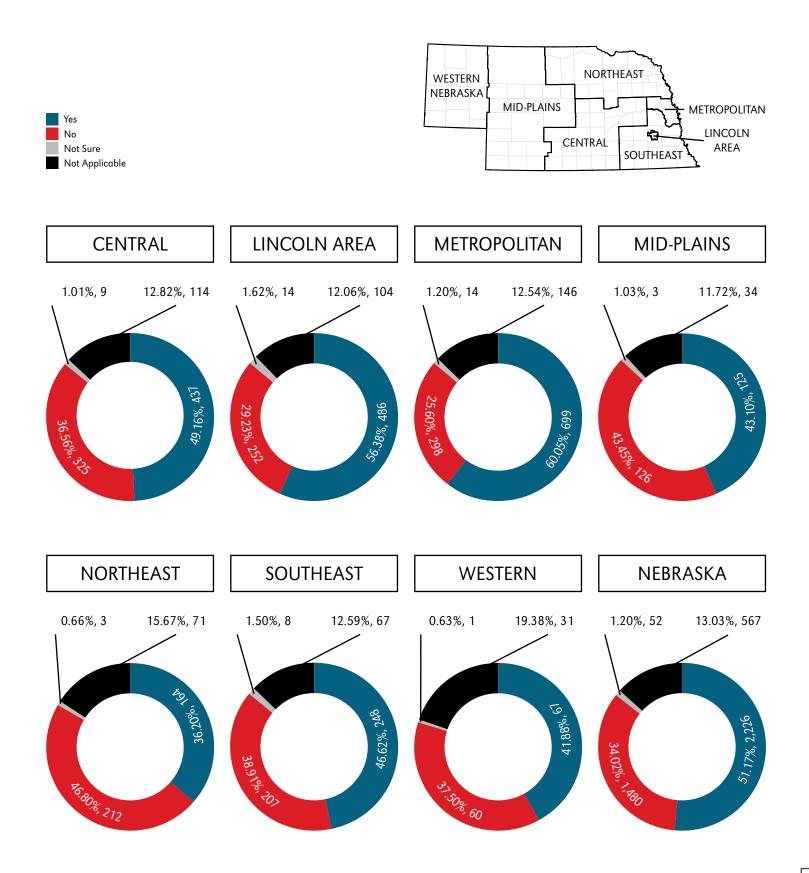


	0%	10%	20%	30%	40%	50%	60%	70%	80%	90%	100%
1: Financial	Central		(63.33%,	563						
impact on	Lincoln Area	61.83%, 533									
operations and/or	Omaha Metro	63.66%, 741									
liquidity and	Mid-Plains	61.72%, 179									
capital	Northeast	66.00%, 299									
	Southeast		(63.35%,	337						
	Western		5	9.38%, 9	5						
	Nebraska		6	3.15%, 2	,747						
2: Duration	Central			59.51%,	529						
of outbreak/	Lincoln Area			59.16%,	510						
quarantine efforts	Omaha Metro	60.40%, 703									
	Mid-Plains		5	5.86%, 1	62						
	Northeast		Ę	58.06%, 2	263						
	Southeast			59.96%,	319						
	Western			58.13%,	93						
	Nebraska		5	9.29%, 2	2,579						
3: Decreasing	Central		49.6	51%, 441							
consumer	Lincoln Area		46.52	%, 401							
confidence/ spending	Omaha Metro		45.19	%, 526							
spending	Mid-Plains 48.62%, 141										
	Northeast		51.	43%, 23	3						
	Southeast		49.0	6%, 261							
	Western		48.1	3%, 77							
	Nebraska		47.82	%, 2,080)						_



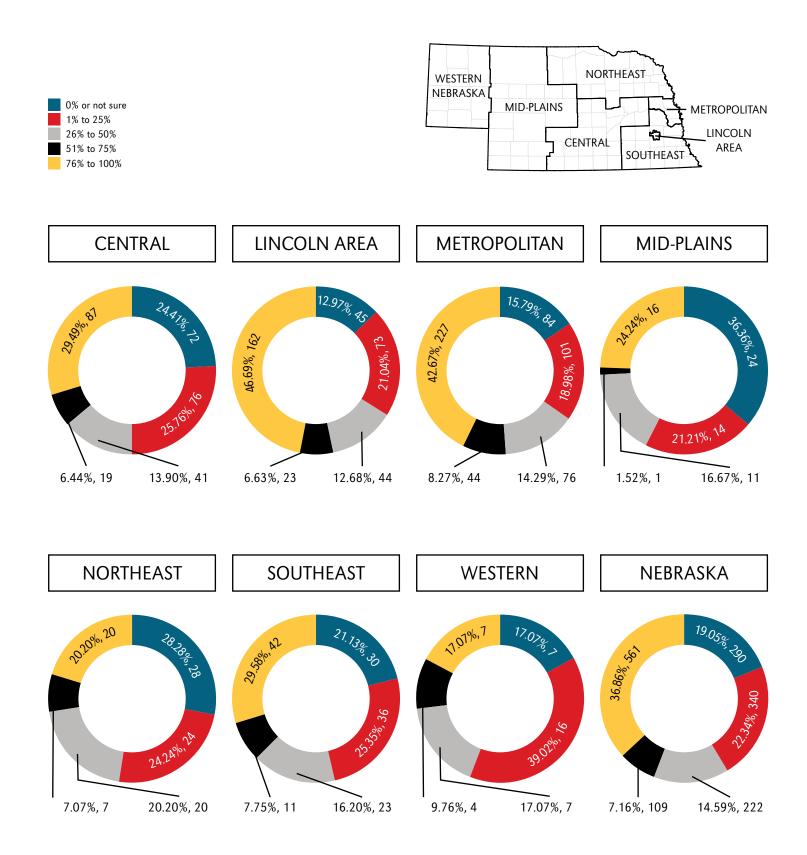




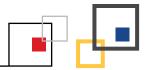


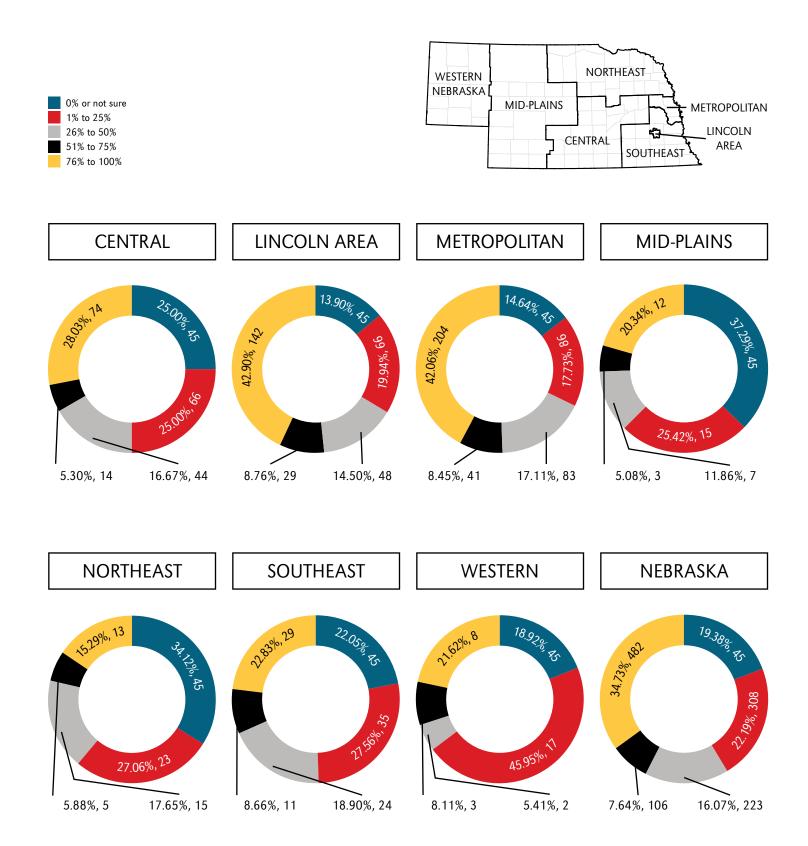
Percent of employees that are **able to work remotely**.



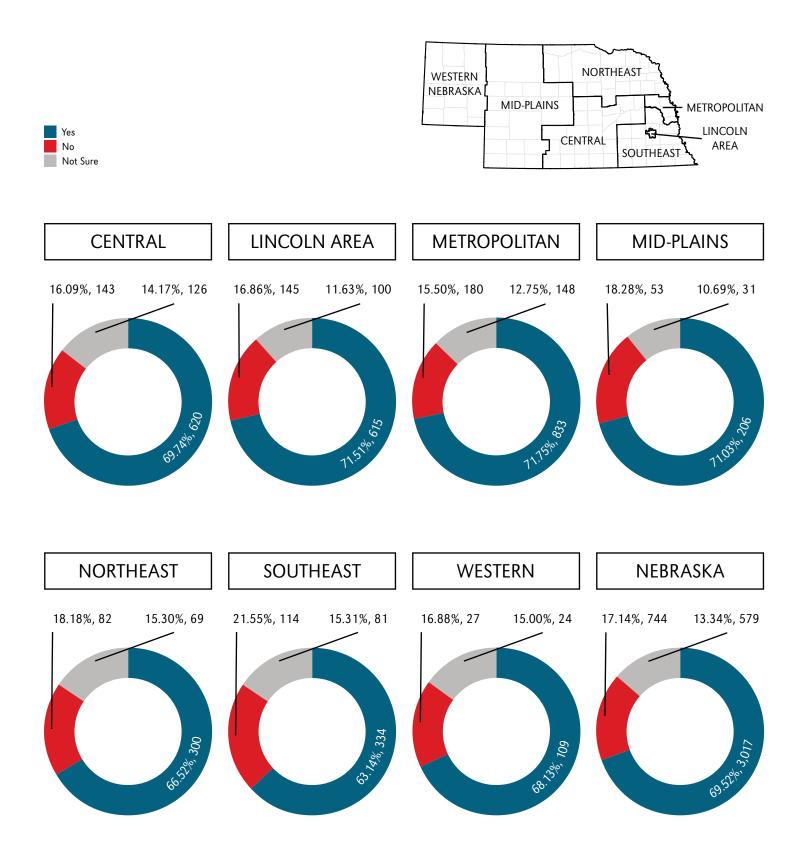


Percent of employees currently working remotely.

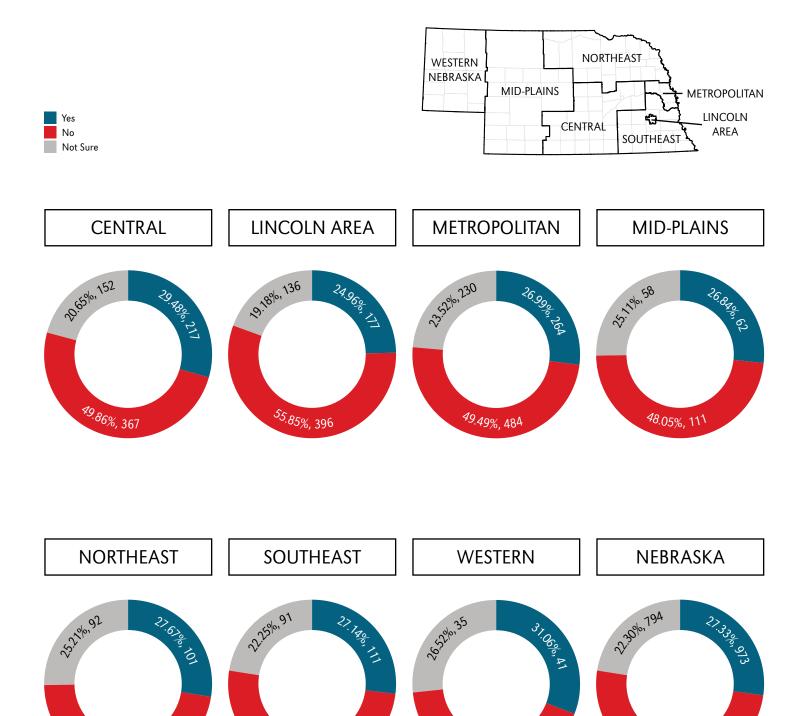












50.61%, 207

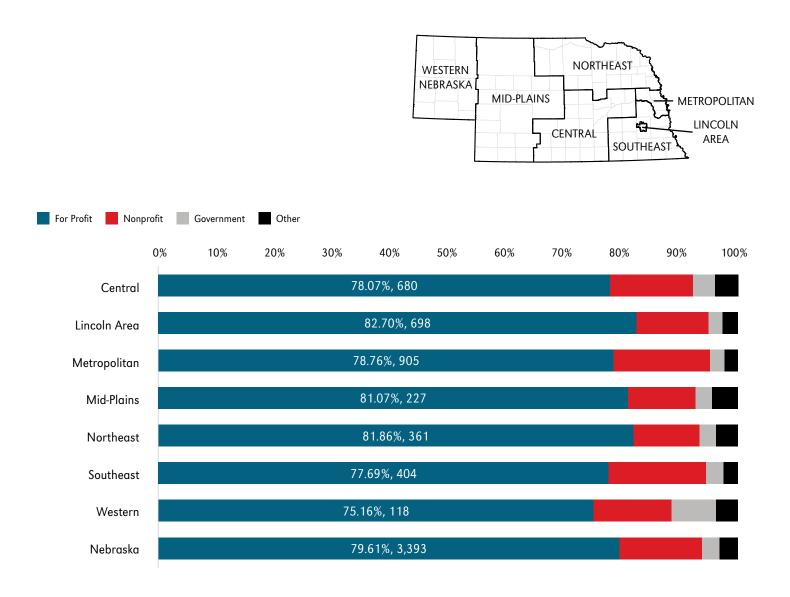
47.12%, 172

42.42%, 56

45

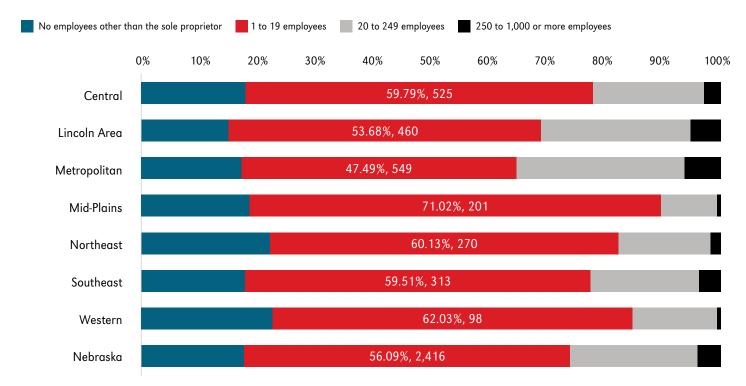
50.37%, 1,793



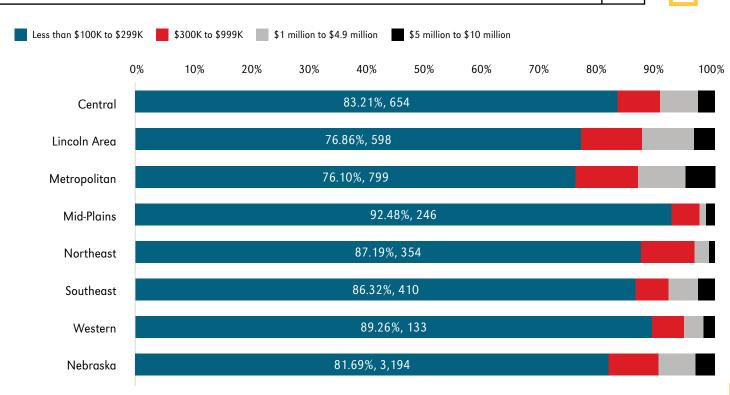


In February of 2020, what was your organization's total **monthly employment** at your main location?





In February of 2020, what was your organization's **monthly revenue**?



NEBRASKA BUSINESS RESPONSE SURVEY REPORT – REGIONAL REPORT



A survey gauges the opinion of a target population with data from a sample, a subset of the population. The Nebraska Business Reponses survey intends to understand the impact of COVID-19 on all private-sector businesses and nonprofit organizations in Nebraska. All private-sector businesses and nonprofits in Nebraska is the population.

We sampled these organizations by providing an open-access link through multiple communication mediums. Organizations self-selected into the study. Self-selection into a survey impacts the confidence we can have when we generalize from our sample to the population¹. As a result, we do not claim to provide information for all private and nonprofit organizations in Nebraska. We can only summarize the views of those that responded to the survey. Consistent with this approach, we do not provide confidence intervals or margins of error for any data points in the survey, despite the large sample. However, we will provide some analysis of how representative the sample is. A representative sample accurately reflects the population on some key demographics. The key demographics we will examine are: geographic distribution of organizations across the state and the size of organizations, based on number of employees they have. The comparison data comes from Nebraska Department of Labor (DOL).

	Central Community College	Metro Community College	Mid-Plains Community College	Northeast Community College	Southeast Community College	Western Nebraska Community College
DOL % of businesses in each community college district	17%	38%	6%	9%	24%	5%
% of organizations that responded to the survey in each district	20%	27%	7%	10%	32%	4%

Table 1: Percentage of businesses that are in each community college district of Nebraska | DOL datacompared to survey response data

*Numbers from the DOL are based on 2019 Quarter 3 businesses with 0-249 employees which represents 97% of all businesses. This was due to a data access at the time of analysis

*DOL data includes the City of Lincoln as part of the Southeast region. In the survey and reporting we are able to separate the City of Lincoln. Here they are combined for easy comparison.

¹Keiding, N., & Louis, T. A. (2018). Web-based enrollment and other types of self-selection in surveys and studies: consequences for generalizability. Annual Review of Statistics and Its Application, 5, 25-47.

Based on the data in Table 1, we conclude that our survey respondents represent the distribution of organizations across the community college districts of Nebraska. Next we examine the size of organizations, measured by the number of employees they have.

Number of Employees	DOL (n)	DOL %	Survey (n)	Survey %	
0	7,145	10.7%	805	17.6%	
1-4	30,900	46.4%	1,187	26.0%	
5-9	11,289	17.0%	721	15.8%	
10-19	8,132	12.2%	621	13.6%	
20-49	5,837	8.8%	545	12.0%	
50-99	1,898	2.9%	284	6.2%	
100-249	881	1.3%	193	4.2%	
250-499	251	0.4%	83	1.8%	
500-999	169	0.3%	51	1.1%	
1,000 or more	54	0.1%	70	1.5%	
TOTAL	66,557	100.0%	4,560	100.0%	

Table 2 demonstrates that we generally have a proportionally representative sample, when examining size of organizations. For example, in the DOL data the largest category is 1-4 employees. In the survey responses, 1-4 employees, is also the category with the largest number of responses. However, we have more responses from larger organizations compared to their proportion of all organizations in the Nebraska Department of Labor data.

As a result of this analysis, we can say that we generally have a fair representation of organizations across the regions of Nebraska and among different size organizations.



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