



# Economic Impact of COVID-19 on Southern Illinois Businesses

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**Client**

Lynn Andersen Lindberg, Interim Executive Director<sup>1</sup>

Greg Bouhl, Director, Entrepreneurship & Business Dev.

Deborah Barnett, Director of Small Business Incubator Programs<sup>1</sup>

SIU Research Park<sup>1</sup>

Southern Illinois University

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**ARC Evaluation Team**

Adam Green, M.A., Project Lead

Wenqian Zhou, M.A., Project Co-Lead

Aarren Minneyfield, B.A., Project Co-Lead

Christina Engelken M.A., Project Personnel

Victoria Arndt, B.A., Project Personnel

Betty Akamani, B.A., Project Personnel

Aradhna Mohan, M.Sc., Project Personnel

Emily Galeza, M.A., Senior Advisor and Project Personnel

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**Project Supervisor**

Randall Davis, Ph.D., ARC Director

Applied Research Consultants (ARC)

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# SURVEY PROCESS EXECUTIVE SUMMARY

## Introduction

Applied Research Consultants was contracted by Lynn Andersen Lindberg, Deborah Barnett, and Greg Bouhl of the SIU Research Park, to collect information about the economic impact of COVID-19 on Southern Illinois businesses. Previous reports about the economic impact of COVID-19 in Illinois were largely focused on Chicago and its surrounding areas. Thus, the Client requested a more accurate depiction of the impact of COVID-19 on rural areas such as Southern Illinois. The goal of this project was to determine the economic impact of COVID-19 on surrounding businesses in five Southern Illinois counties (i.e., Franklin, Jackson, Jefferson, Perry, and Williamson). As a follow-up to the initial survey conducted in May 2020, this project also compared the impact of COVID-19 across the two time points. Additionally, this report also addresses how COVID-19 has impacted service versus non-service industry companies over both time points. The following report outlines the results and informs the Client of the economic impact of COVID-19 on Southern Illinois businesses.

## Method

The survey was open on Qualtrics for a total of 12 days (i.e., from February 3<sup>rd</sup>, 2021 through February 15<sup>th</sup>, 2021). Respondents were not required to answer every survey item and some items allowed respondents to provide multiple answers. Therefore, sample sizes vary from question to question. The survey contained 9 questions about information pertaining to respondents' business, including the industry, length of time in operation, and number of employees. For this iteration of the survey, respondents were also asked whether they had completed the first survey in April/May. The survey also contained 7 questions about the impact on COVID-19 on business operations, such as the number of employees respondents had to lay off or furlough and how revenue had been impacted. Further, the survey contained 11 questions about the respondents' feelings of concern regarding various aspects of their business, such as losing customer traffic and maintaining employees' financial welfare. Fifteen questions from the survey asked respondents about different types of assistance that would be helpful to their business. Two questions asked respondents to report any gap finance programs they have applied for, will apply for, or have received. Lastly, the survey contained an open response item in which respondents were able to report anything else that they believed would help their business recover from COVID-19.

# SUMMARIZED RESULTS

Of the 117 collected responses, the majority (53.8%) of businesses were located in Williamson ( $n = 34$ )<sup>1</sup> and Jackson ( $n = 29$ ) county with the remaining 46.2% of businesses located in Perry ( $n = 6$ ), Franklin ( $n = 7$ ), and Jefferson ( $n = 5$ ) county or a county not listed ( $n = 36$ ). Across all counties, most business owners reported that their business was locally owned (68.3%) and in operation for more than 10 years (49.5%). Over half of respondents own their workspace (56.4%) and most frequently employ 0-3 full-time (54.7%) and 0-1 part-time (54.7%) employees.



Most business owners reported that they did not have to lay-off (55.5%) or furlough (57.2%) any of their employees due to COVID-19. For overall sales, the majority (58.9%) of respondents reported a revenue decrease by 26.0% or greater; however, respondents who have an online sales component to their business reported a 4.46% increase in online sales since before COVID-19. If disruption were to continue at the current rate, 41.8% of business owners reported that they could only stay afloat 0-4 months. Of business owners who applied for gap finance programs, the most commonly received programs were the Small Business Administration (SBA) Paycheck Protection Program (PPP;  $n = 39$ ) and the Small Business Administration (SBA) Economic Injury Disaster Loan (EIDL;  $n = 27$ ).

Many businesses reported experiencing the same challenges due to COVID-19. Across all counties, revenue loss ( $n = 66$ ), cancelled events ( $n = 56$ ) and Added expenses to mitigate public safety (e.g., cleaning supplies, gloves, masks, etc.;  $n = 53$ ) were most frequently reported. Likewise, many businesses reported similar concerns about outcomes due to COVID-19, including losing business ( $M = 3.38$ ), protecting employees' health and safety ( $M = 3.21$ ), and losing customer traffic ( $M = 3.29$ ). Additionally, all counties indicated that more in-depth information about available financial assistance would be helpful to their business right now ( $M = 3.05$ ).

Although there were many commonalities among the five counties, there were also several differences that emerged between forms of assistance that would be helpful to each county. Business owners in Williamson ( $M = 2.55$ ) county reported that opportunities to talk with and learn from other business owners on expenses would be the most helpful forms of assistance. Jefferson county business owners reported that cash flow management ( $M = 3.00$ ) was one of the most helpful form of assistance it was also the only county to have it in its top 3. Further, business owners in Franklin ( $M = 3.50$ ) county reported that it would be most helpful to have information on how to sell their brand/business.

This report also compares the results from the initial survey, completed in April/May 2020, with the more current data from February 2021. Several differences arose between the two points in time. First, respondents were less concerned about factors such as the health and financial welfare of their employees in February (employee health  $M = 3.19$ )(financial welfare  $M = 2.84$ ), when compared to April/May (employee health  $M = 3.52$ )(financial welfare  $M = 3.10$ ). Second, respondents were more interested in how to hire new employees in February ( $M = 2.00$ ), when compared to April/May (1.60). Finally, more respondents had applied for (19.7% had not applied in April/May, while 11.5% had not

<sup>1</sup> Throughout the report “n” is used to denote a sample size (number) from the total response rate and “M” is used to denote mean.

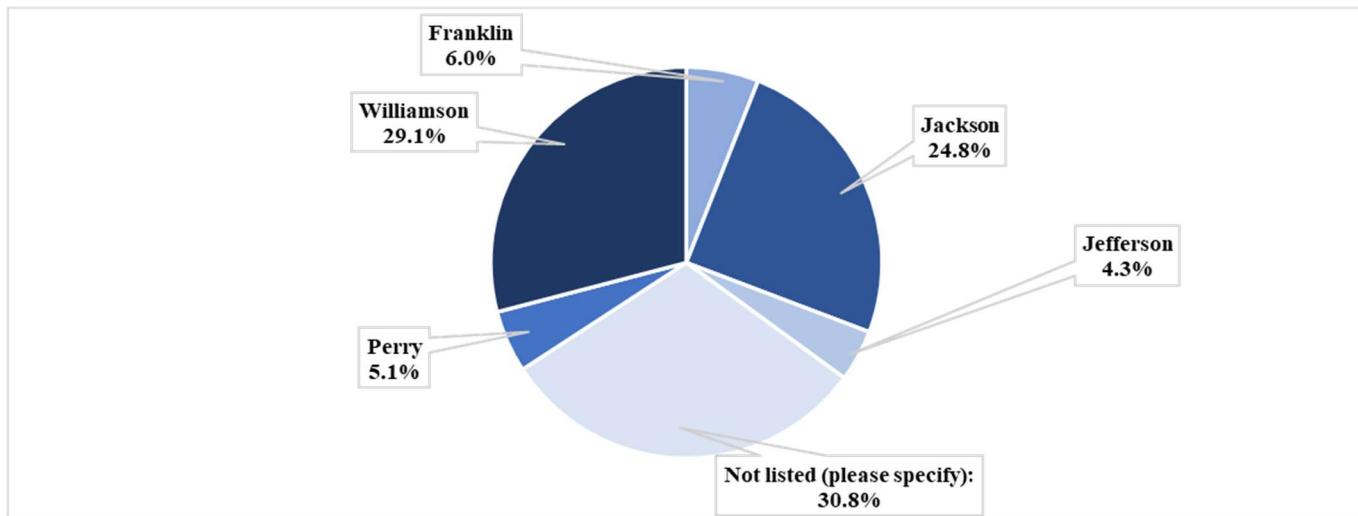
applied in February) and received (e.g. 8.3% had received EIDL funding in April/May, compared to 21.4% in February) assistance money in February, when compared to April/May.

This report also examines differences between service (e.g. restaurants, retail, etc.) and non-service industries (e.g. manufacturing, finance, etc.) from both time points. Several differences became apparent between the industry types. First, service industry respondents reported a wider variety of impacts brought on by the pandemic (e.g. loss of revenue, restriction of business hours, etc.) than did non-service industry respondents. Second, service industries were hit particularly hard during April/May, as the state was in a full lockdown at that point, meaning that many service industry businesses were fully locked down. This disparity in the impact of COVID-19 largely disappeared in February. Finally, service industry respondents rated technical training on social media ( $M = 2.66$ ) as more helpful than did non-service industry respondents ( $M = 2.30$ ).

# ALL COUNTIES

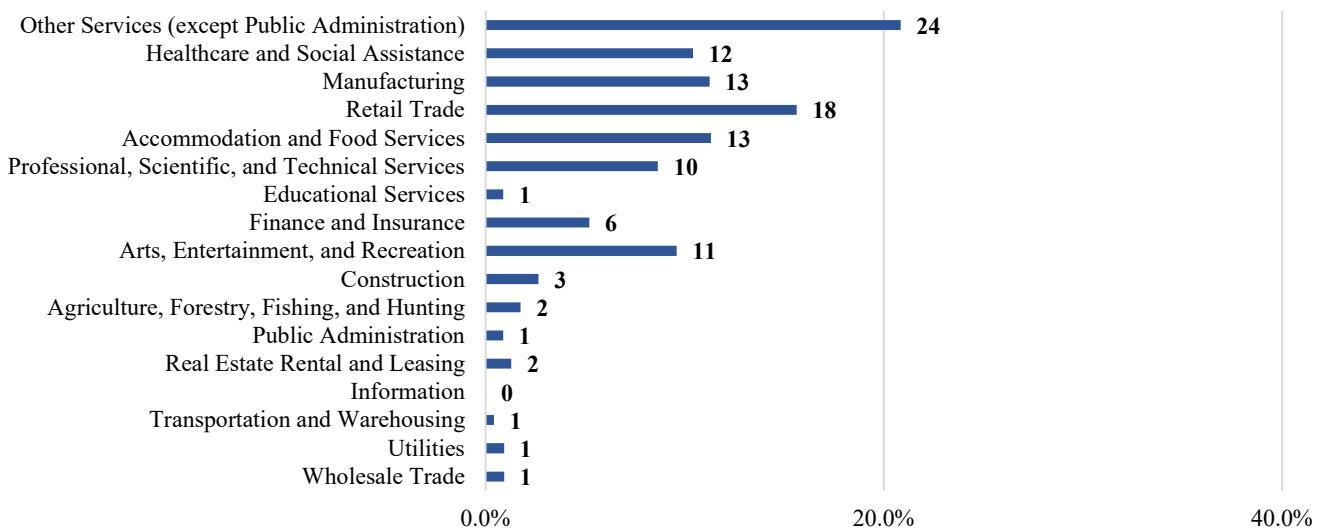
## Breakdown by County

- The breakdown by county was Williamson (29.1%), Jackson (24.8%), Perry (5.1%), Franklin (6.0%), Jefferson (4.3%), and Not listed (30.8%). The “Not listed” response option was intended to allow respondents who were not located in the five-county region the option to complete the survey or allow respondents who wanted to view the survey items the opportunity to do so without compromising the integrity of data collection. Due to the high percentage of respondents who reported being from “Not listed” counties, their data was included in the analysis to maintain an adequate sample size (n = 117).



## Breakdown by Industry

- The most commonly reported industry was Other Services (except Public Administration) (20.9%), followed by Retail Trade (15.7%), Accommodation and Food Services (11.3%), Healthcare and Social Assistance (10.4%), and Arts, Entertainment, and Rec. (9.6%) (n = 115).

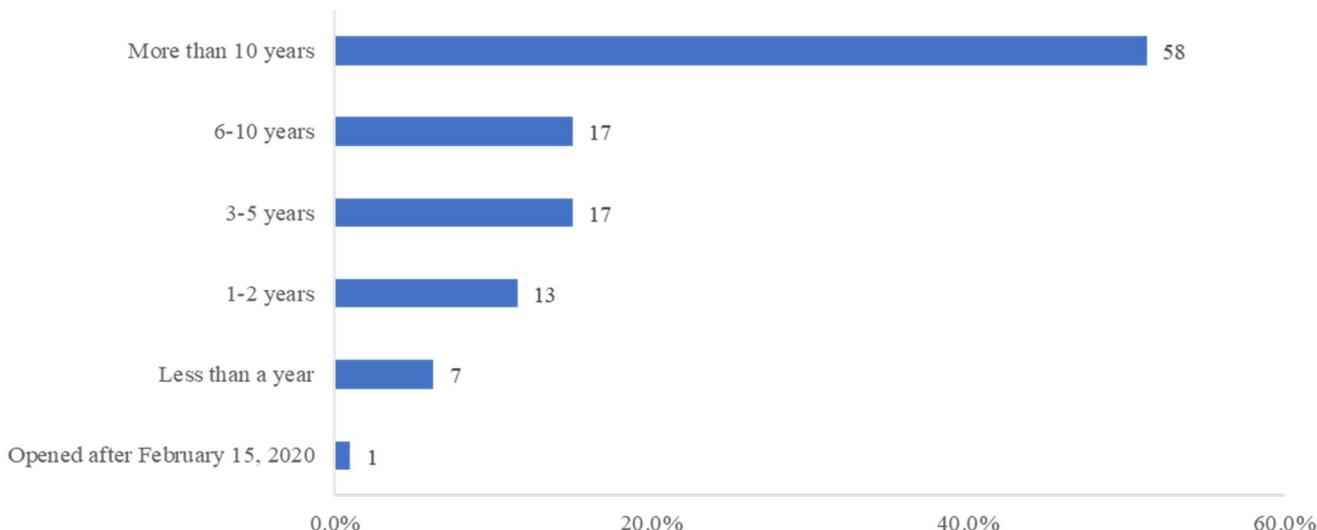


## Ownership

- Respondents were asked how they would characterize the ownership of their business. Most respondents reported that their business was locally owned (n = 80), followed by woman-owned (n = 30), minority-owned (n = 13), other (e.g., non-profit; n = 10), veteran-owned (n = 9), out-of-state-owned (n = 5), and out-of-country-owned (n = 1).

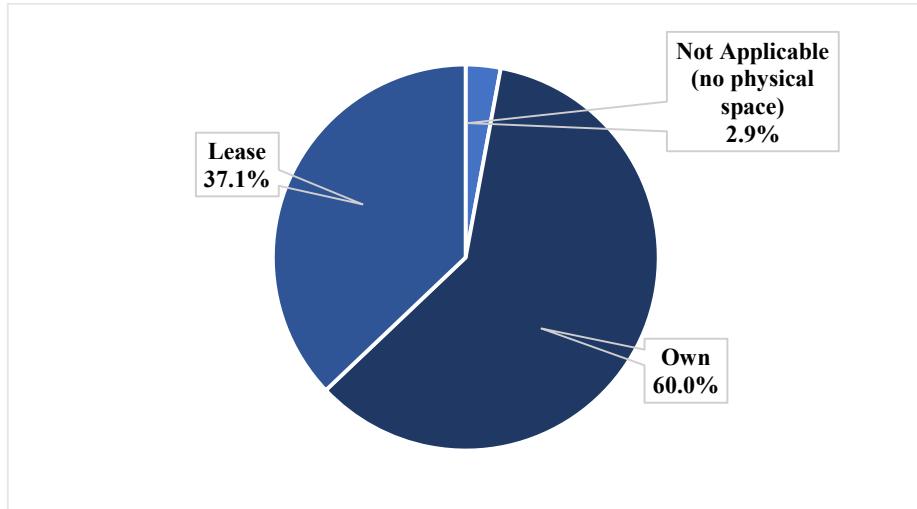
## Length of Operation

- When asked about length of operation, the majority (51.3%) of business owners reported that they have been operating more than 10 years. 15.0% have been operating 6-10 years, 15.0% 3-5 years, 11.5% 1-2 years, 6.2% less than a year, and 0.9% opened after February 15, 2020 (n = 113).

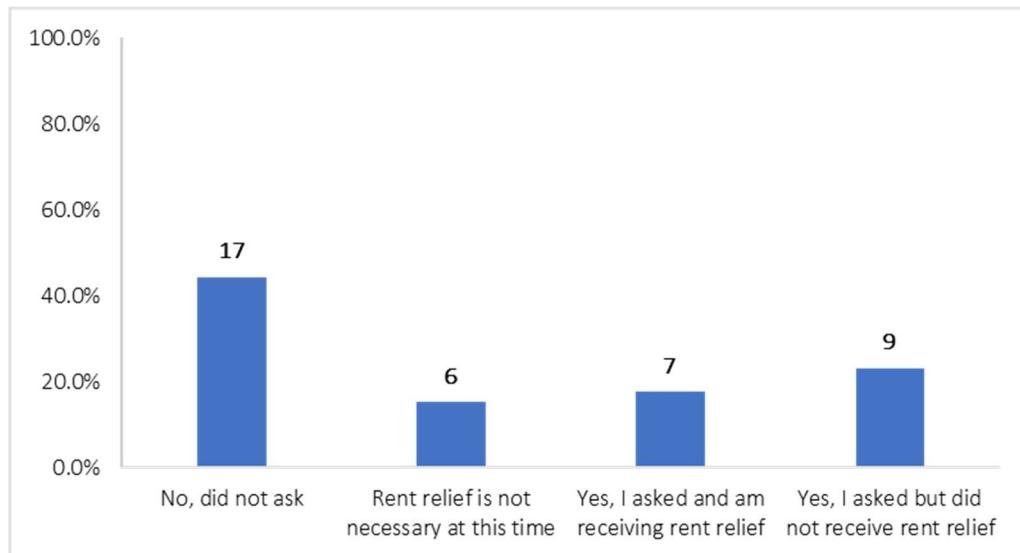


## Workspace

- Most respondents (58.4%) own their workspace, 34.5% lease their workspace, and 7.1% stated that they do not have a physical workspace (n = 113).

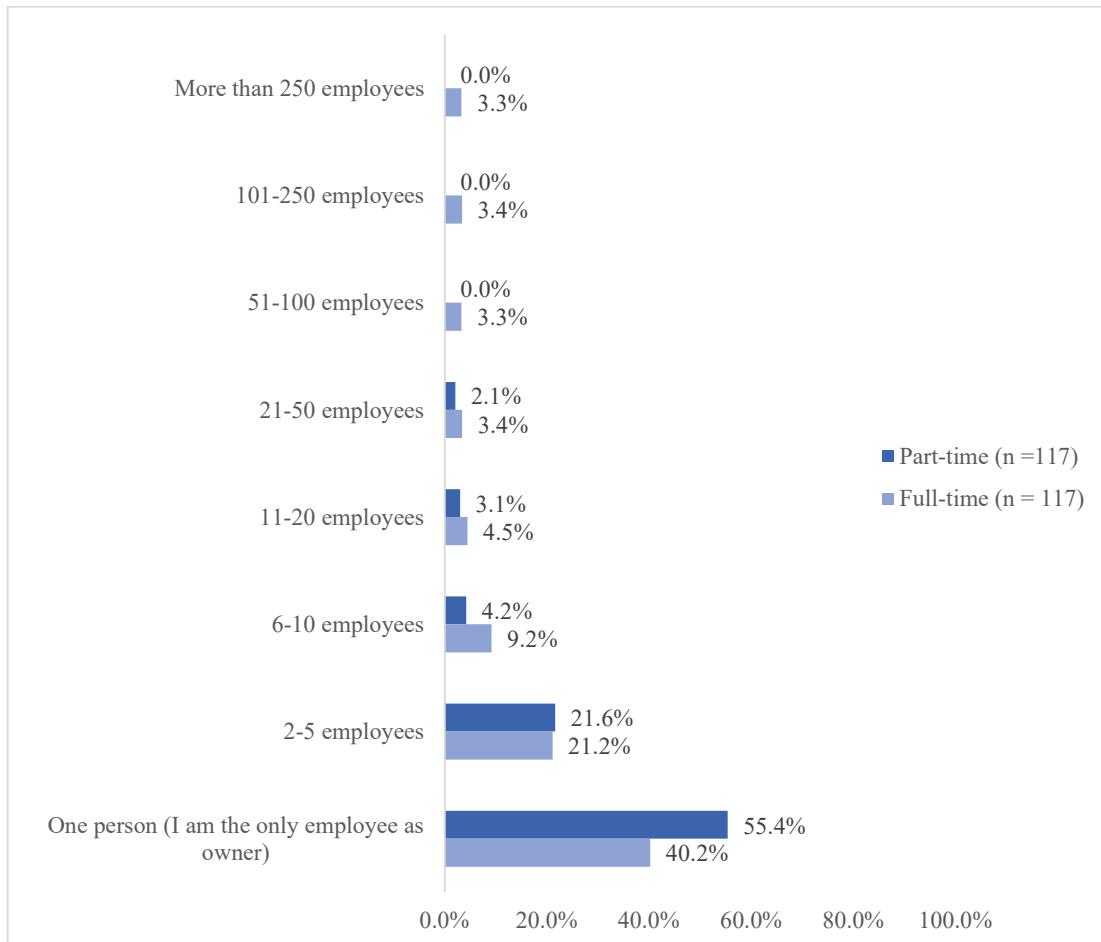


- Of respondents who lease their workspace (n = 39), 43.6% stated that they did not ask for rent relief, 15.4% stated that rent relief is not necessary at this time, 17.9% indicated that they received rent relief, finally 23.1% stated that they asked but did not receive rent relief.

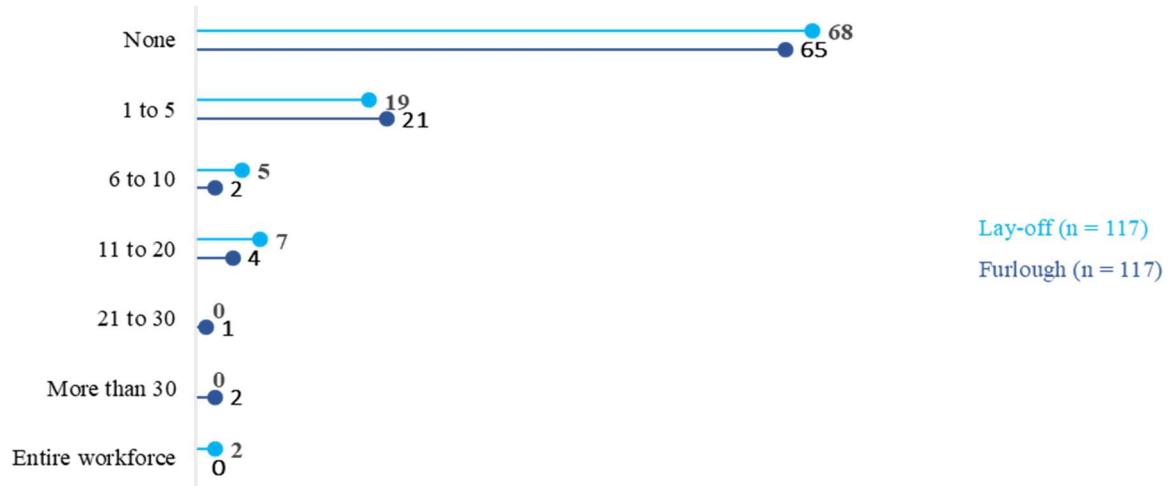


## Employees

- When respondents were asked how many full-time and part-time employees they have, the most frequently reported number of full-time (21.6%) and part-time (21.2%) employees was 2-5 employees. The largest category overall was respondents who had no other employees beyond themselves (55.4% had no other part-time employees, while 40.2% had no other full-time employees).

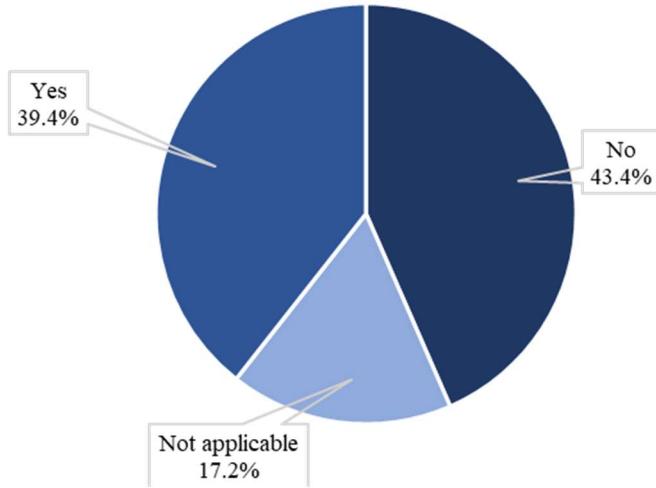


- Participants were asked how many employees they had to lay-off and/or furlough so far, as a result of COVID-19.
  - 55.6% did not have to lay off anyone, 16.3% laid off 1-5 employees, 4.3% laid off 6-10 employees, 6.0% laid off 11-20 employees, and 1.7% laid off the entire workforce.
  - 57.3% did not have to furlough anyone, 18.0% furloughed 1-5 employees, 7.3% furloughed 6-10 employees, 4.7% furloughed 11-20 employees, 0.5% furloughed 21-30 employees, 6.3% furloughed more than 30 employees.

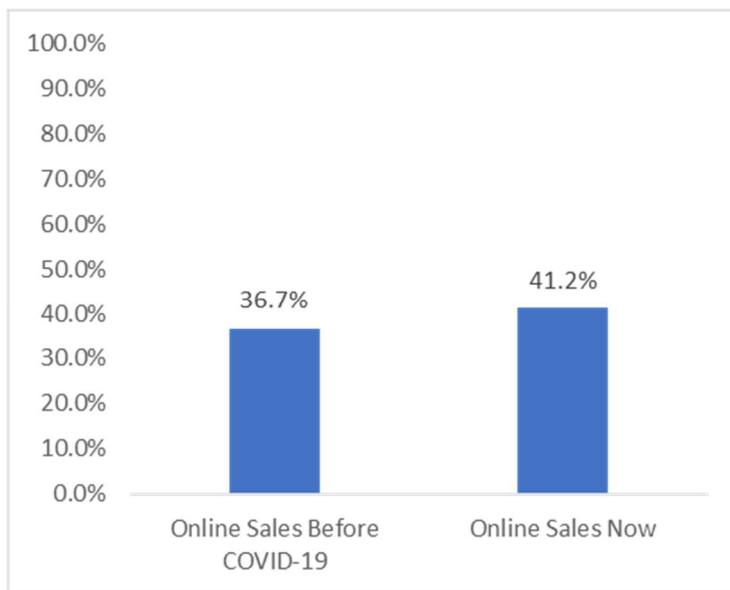


## Revenue

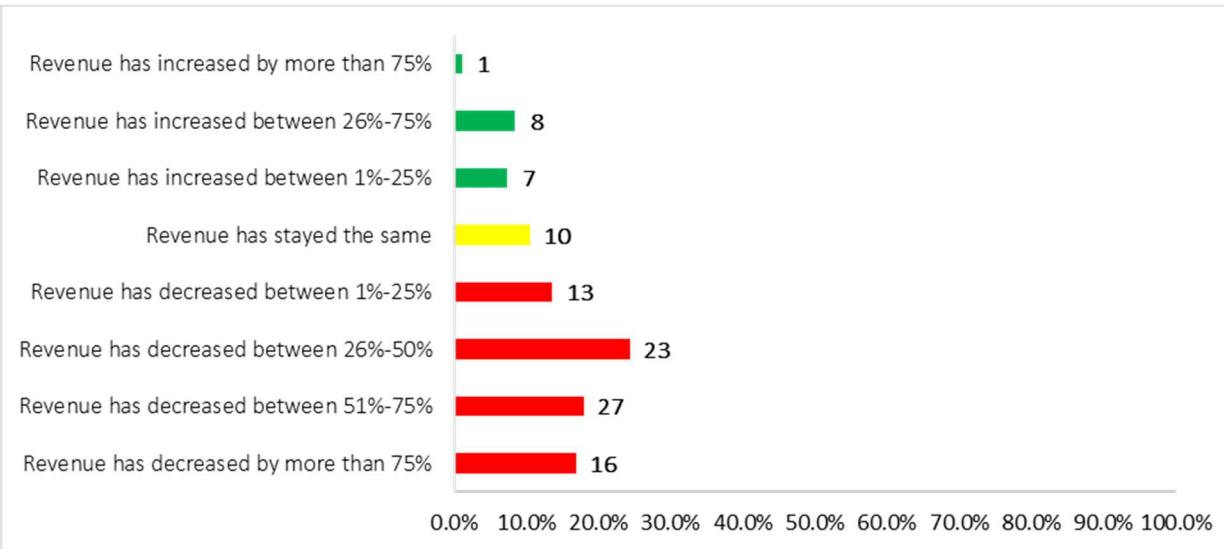
- Slightly more than half of respondents reported that they do not have an online sales component (43.4%). 39.4% of respondents do have an online sales component and 17.2% stated that online sales were not applicable (n = 99).



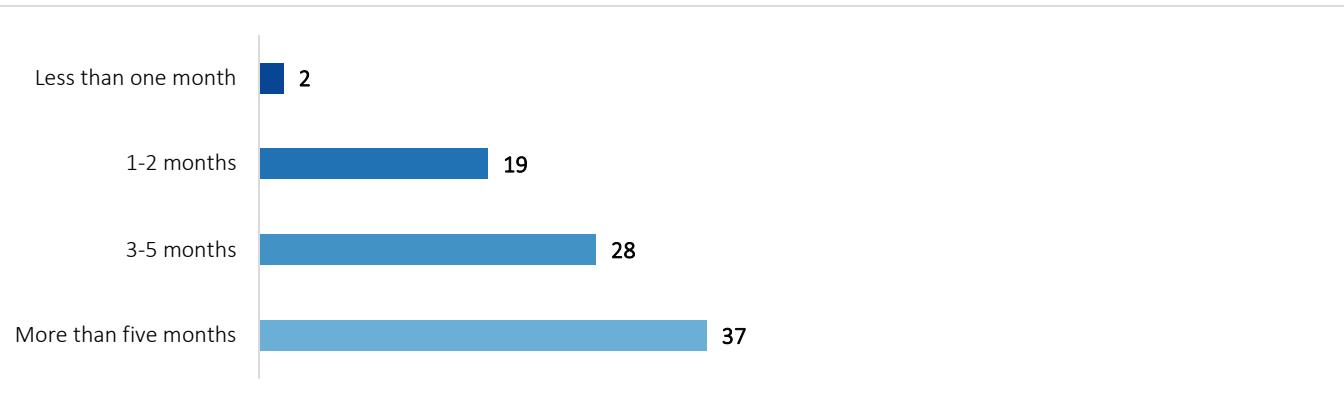
- For businesses that have an online sales component (39.4% of those surveyed), the average amount of revenue generated from online sales before COVID-19 was 36.7% (n = 55); whereas the average amount of revenue generated from online sales now is 41.2% (n = 36), indicating a 4.5% increase.



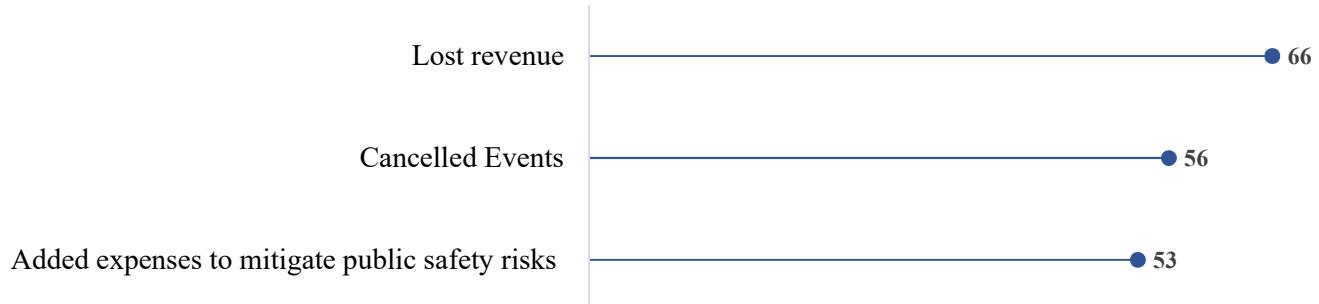
- Respondents were asked about revenue changes since March 2020 due to COVID-19. The majority (72.6%) of respondents reported a revenue decrease, 10.5% of respondents reported that revenue stayed the same and 16.9% of respondents reported a revenue increase (n = 95).



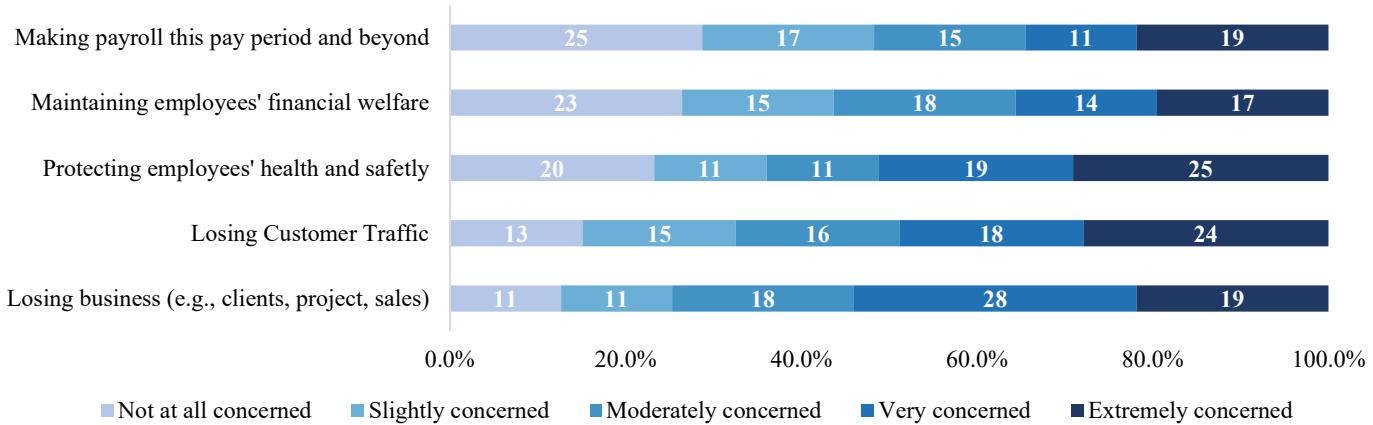
- Participants were asked, “if disruption were to continue at the current rate how soon will your business be at risk of closing permanently?” 31.6% indicated that their business would be at risk of closing after more than 5 months, 26.8% indicated 3-5 months, 9.6% indicated 1-2 months, and 3.9% indicated less than one month (n = 86).



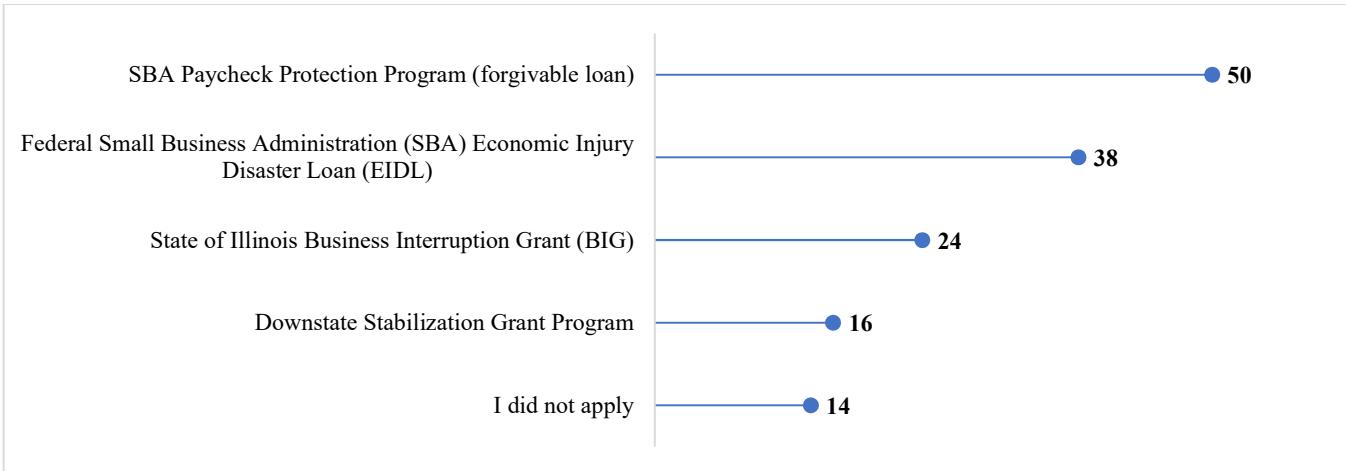
- When asked how COVID-19 has affected their business or organization, respondents most frequently reported revenue losses (n = 66), cancelled events (n = 56), and added expenses to mitigate public safety (n = 53).



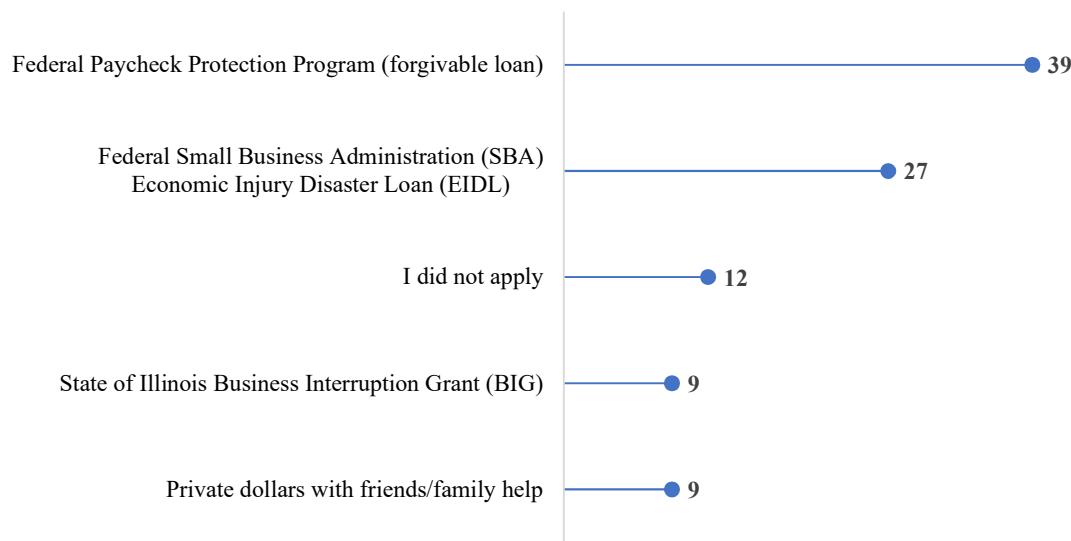
- Participants reported the extent to which they were concerned about several outcomes due to COVID-19 on a 1 (*Not at all concerned*) to 5 (*Extremely concerned*) rating scale. The top five responses with the highest average concern rating were: losing business ( $M = 3.38$ ; n = 87), losing customer traffic ( $M = 3.29$ ; n = 86), protecting employees' health and safety ( $M = 3.21$ ; n = 86), maintaining employees' financial welfare ( $M = 2.85$ ; n = 87), and making payroll this pay period and beyond ( $M = 2.79$ ; n = 87).



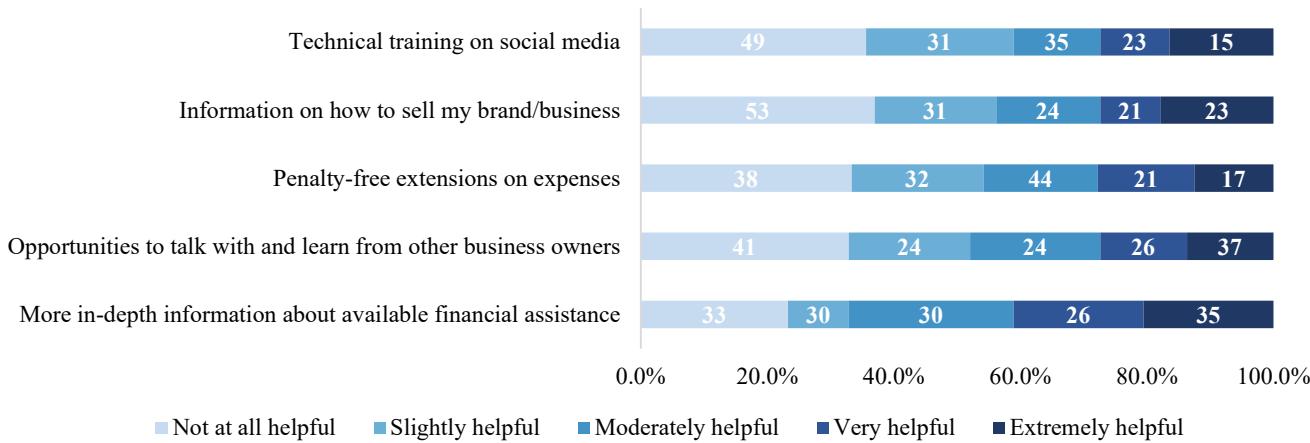
- Participants reported the gap finance programs they applied for or plan to apply for in the future. The top five responses are listed below.



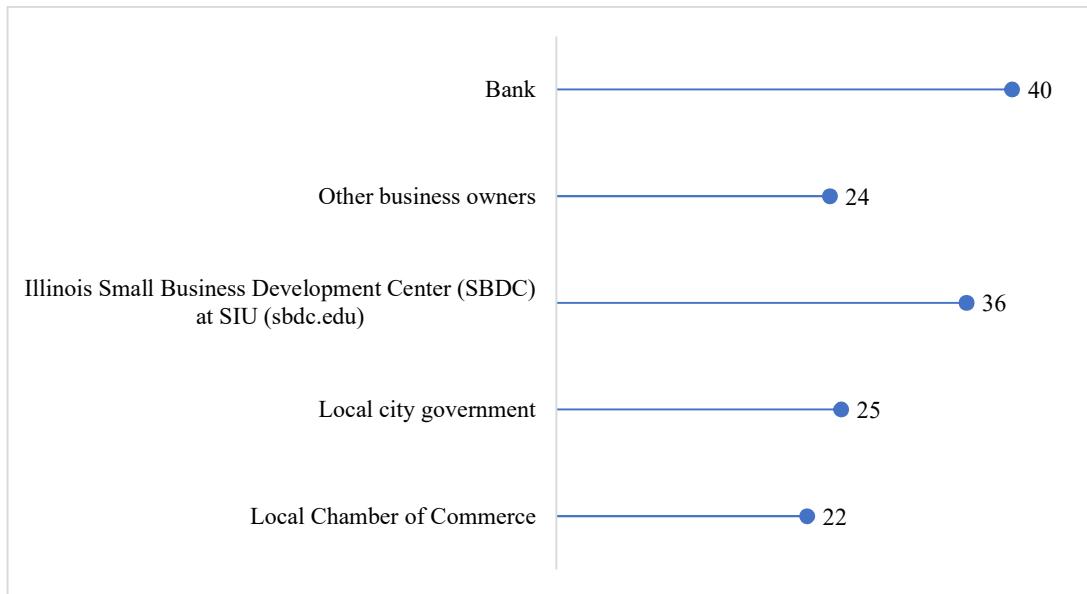
- Participants reported the gap finance programs they have already received. The top five responses are listed below.



- Respondents reported the extent to which several forms of assistance would be helpful to them or their business using a 1 (*Not at all helpful*) to 5 (*Extremely helpful*) rating scale. The top five responses with the highest average helpfulness rating were: more in-depth information about available financial assistance ( $M = 3.05$ ; n = 73), opportunities to talk with and learn from other business owners ( $M = 2.56$ ; n = 73), penalty-free extensions on expenses ( $M = 2.53$ ; n = 72), information on how to sell my brand/business ( $M = 2.52$ ; n = 73), and Technical training on social media ( $M = 2.49$ ; n = 73).



- Respondents were asked which local resources they accessed for assistance during this time. The top five responses are reported below.



# FRANKLIN COUNTY: N = 7

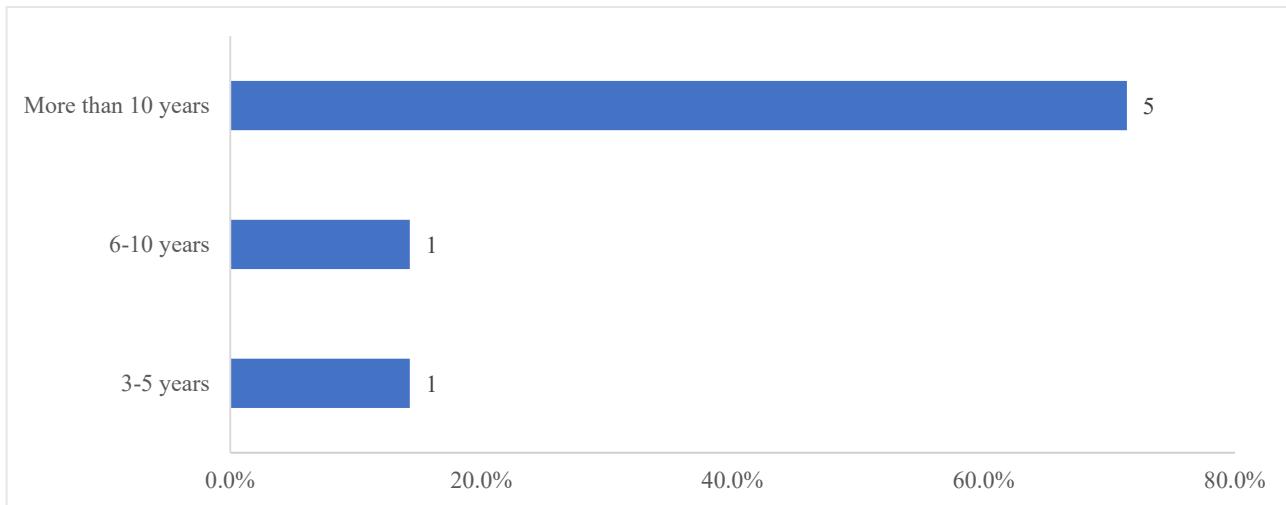


## Ownership

- Respondents were asked how they would characterize the ownership of their business. Most respondents reported that their business was locally owned (n = 4), followed by other (e.g., non-profit; n = 2), and out-of-state owned (n = 1).

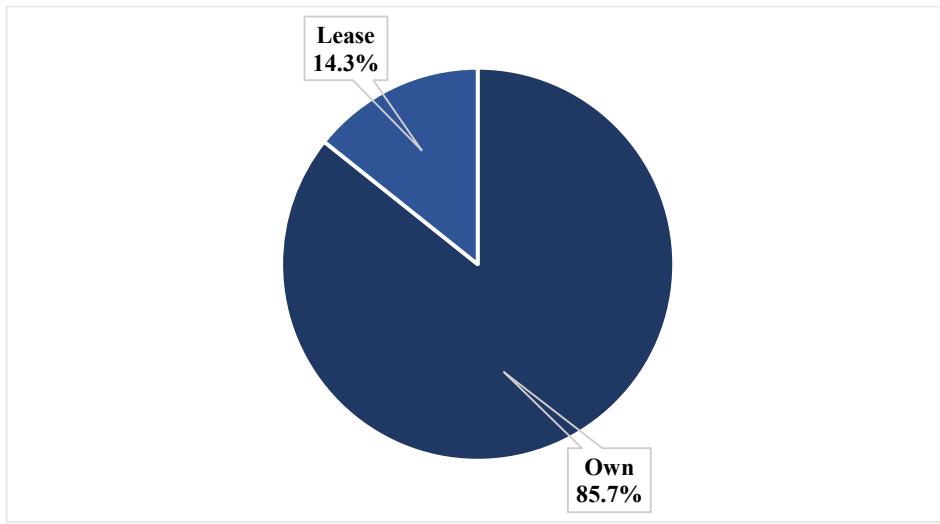
## Length of Operation

- When asked about length of operation, the majority (71.4%) of business owners reported that they have been operating more than 10 years. 14.3% have been operating 6-10 years, and 14.3% 3-5 years (n = 7).



## Workspace

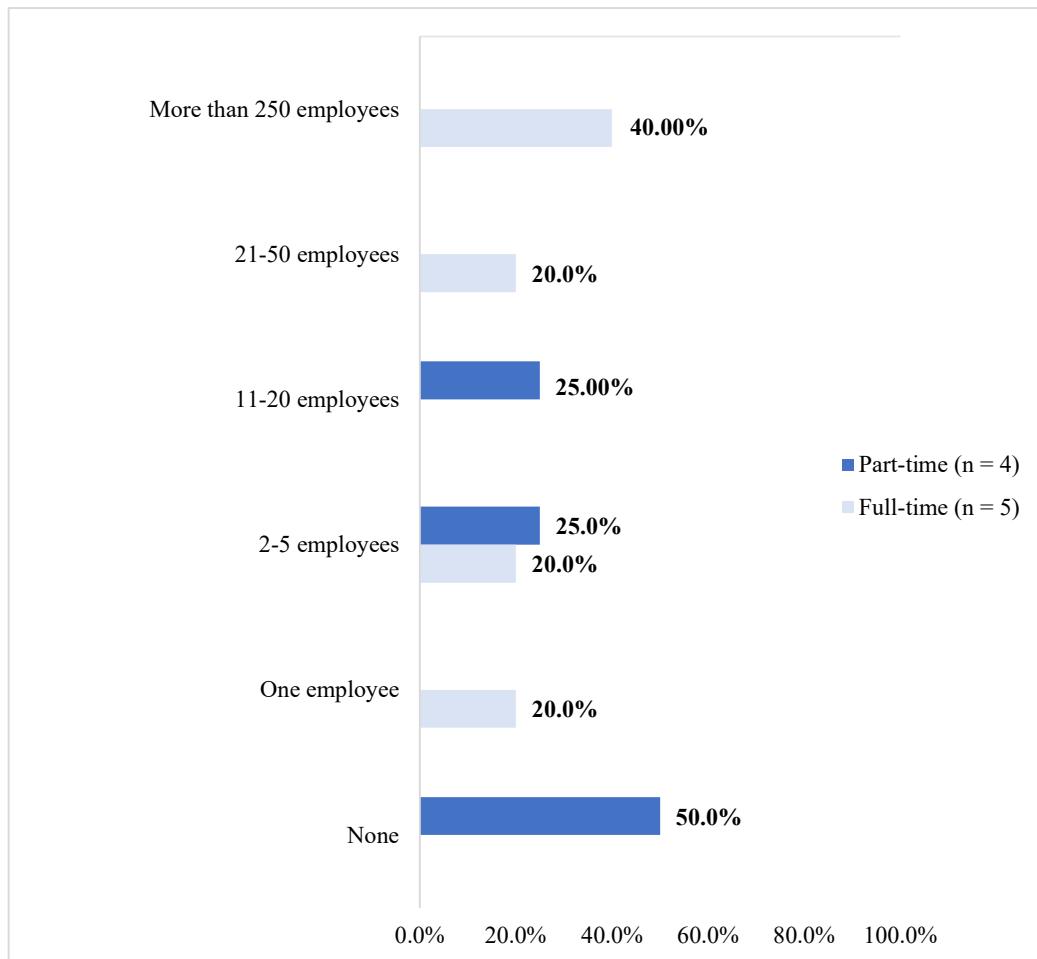
- Most respondents (85.7%) own their workspace and 14.3% lease their workspace (n = 7).



- Of respondents who lease their workspace (n = 1), one person stated yes, I asked, and I am receiving rent relief

## Employees

- When respondents were asked how many full-time and part-time employees they have, the most frequently reported number of full-time employees was 250 or more employees (40%) and 1-3 employees (40%) (n=5). The most frequently reported number of part-time employees was 0 employees (50%) (n=4).

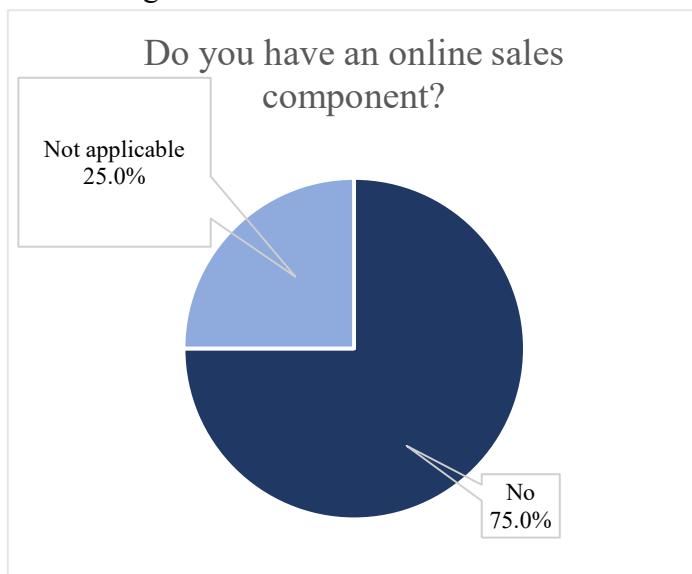


- Participants were asked how many employees they had to lay-off and furlough so far, as a result of COVID-19.
  - 50.0% did not have to lay off anyone, 25.0% laid off 1 employee, and 25.0% laid off 13 employees (n=4).
  - 50.0% did not have to furlough anyone, 25.0% furloughed 1 employee, and 25.0% furloughed 40 employees (n=4).

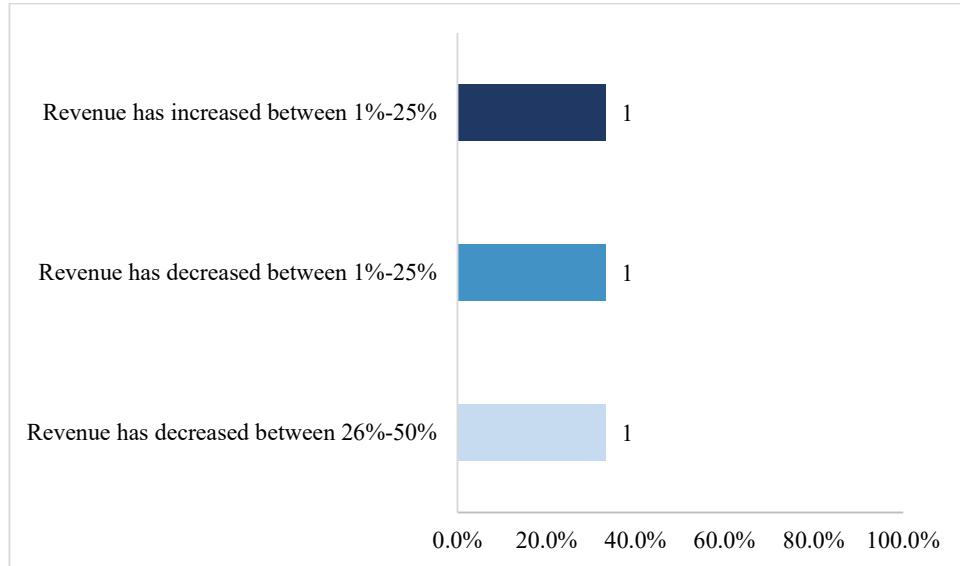


## Revenue

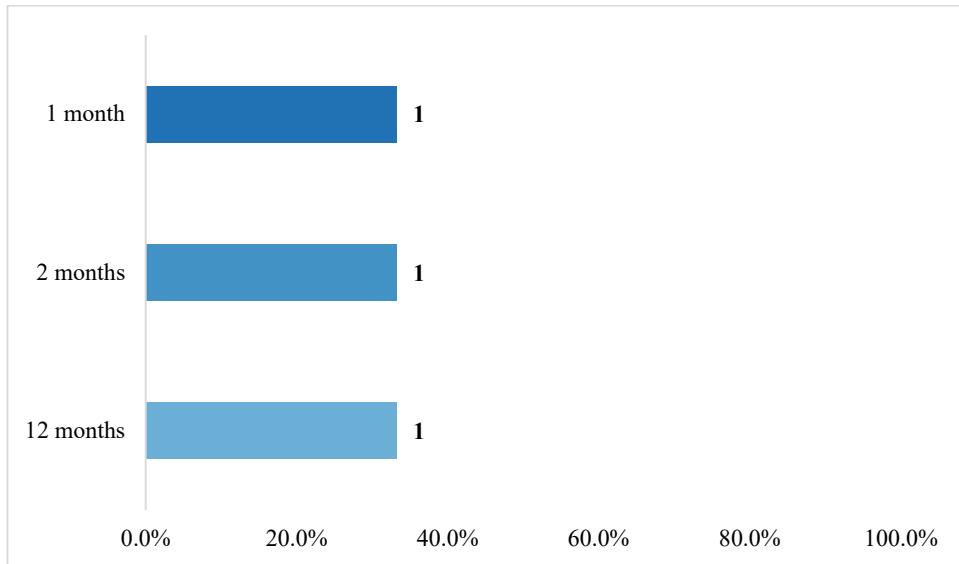
- 75.0% of respondents reported that they do not have an online sales component. No one reported having an online sales component and 25.0% stated that online sales were not applicable (n = 4).
- The average amount of revenue generated from online sales before COVID-19 was 0.0% the average amount of revenue generated from online sales now is 0.0%.



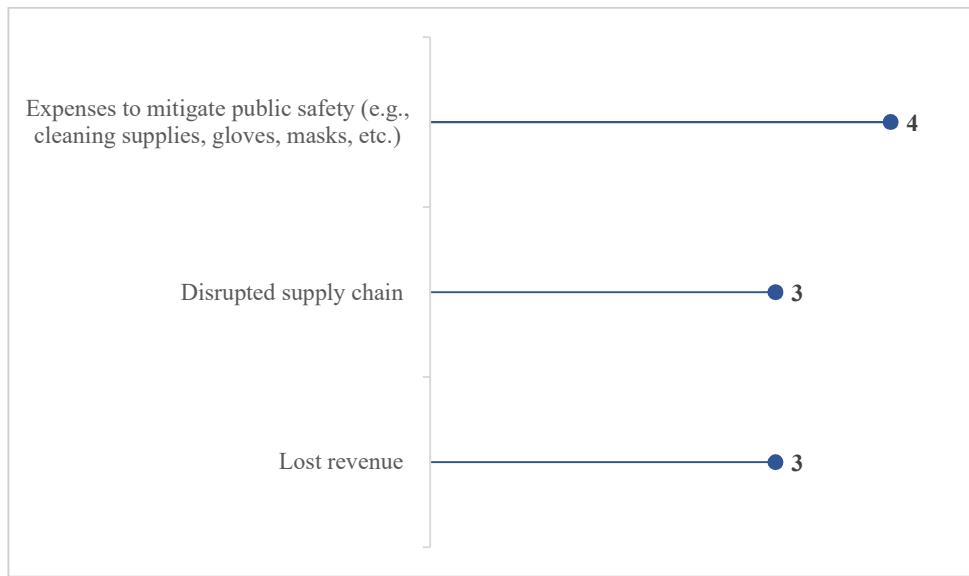
- Participants were asked about revenue changes since March 2020 due to COVID-19. 33.3% of participants reported a revenue decrease between 1%-25%, 33.3% of respondents reported that revenue has decreased between 26%-50%, and 33.3% of respondents reported that revenue has increased between 1%-25% (n=3).



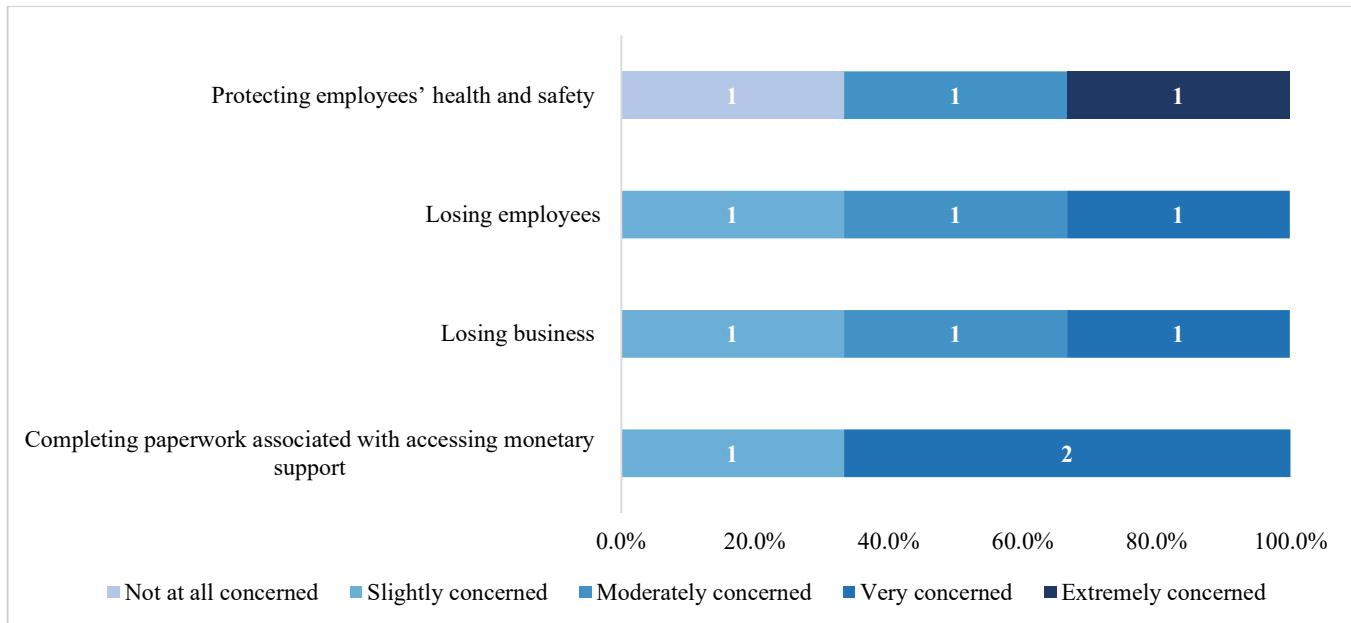
- Participants were asked, “How many months can you stay afloat with the funds you currently have at your disposal?” 33.3% of respondents reported 1 month, 33.3% indicated 2 months, and 33.3% indicated 12 months (n = 3).



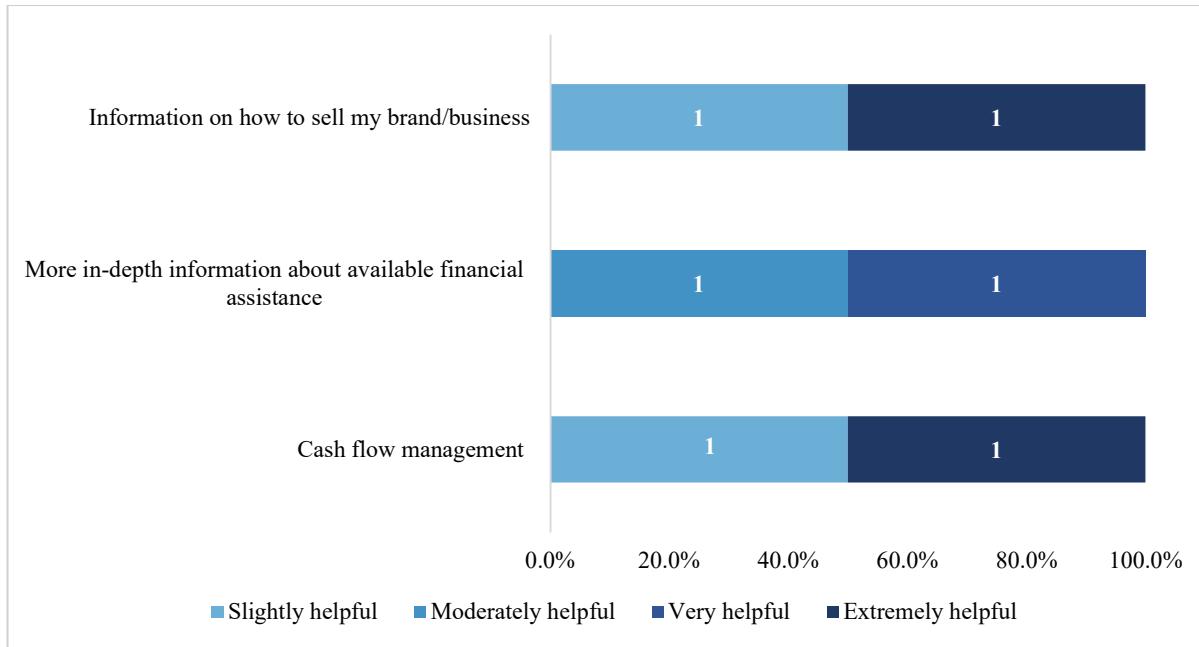
- When asked how COVID-19 has affected their business or organization, respondents most frequently reported added expenses to mitigate public safety (n = 4), disrupted supply chain (n = 3), and lost revenue (n = 3).



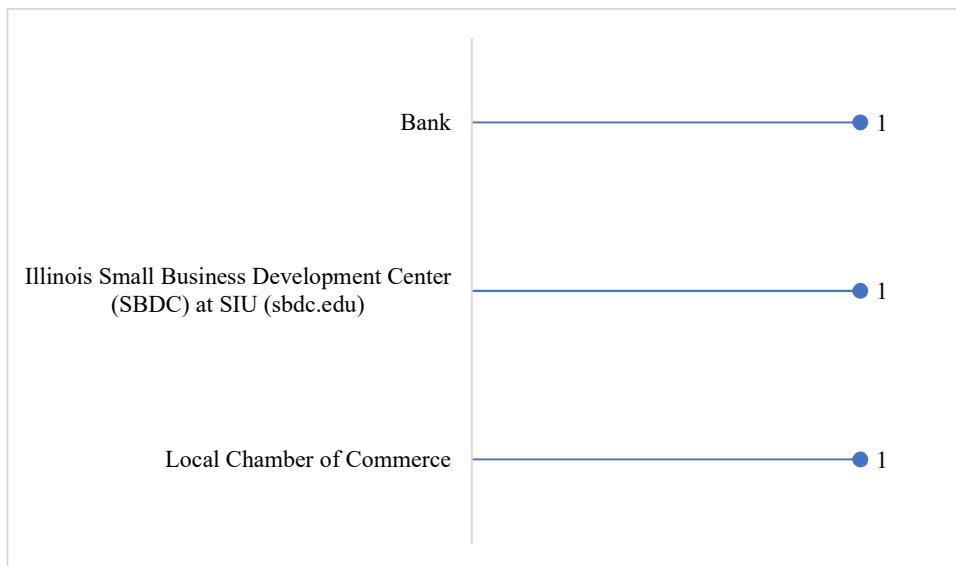
- Participants reported the extent to which they were concerned about several outcomes due to COVID-19 on a 1 (*Not at all concerned*) to 5 (*Extremely concerned*) rating scale. The top three responses with the highest average concern rating were: completing paperwork associated with accessing monetary support ( $M = 3.33$ ; n = 3), losing business ( $M = 3.00$ ; n = 3), losing employees ( $M = 3.00$ ; n = 3), and protecting employees' health and safety ( $M = 3.00$ ; n = 3).



- Respondents reported the extent to which several forms of assistance would be helpful to them or their business using a 1 (*Not at all helpful*) to 5 (*Extremely helpful*) rating scale. The top three responses with the highest average helpfulness rating were: information on how to sell my brand/business ( $M = 3.50$ ;  $n = 2$ ), more in-depth information about available financial assistance ( $M = 3.50$ ;  $n = 2$ ), and cash flow management ( $M = 3.50$ ;  $n = 2$ ).



- Respondents were asked which local resources they have accessed for assistance during this time. The top three responses are reported below.

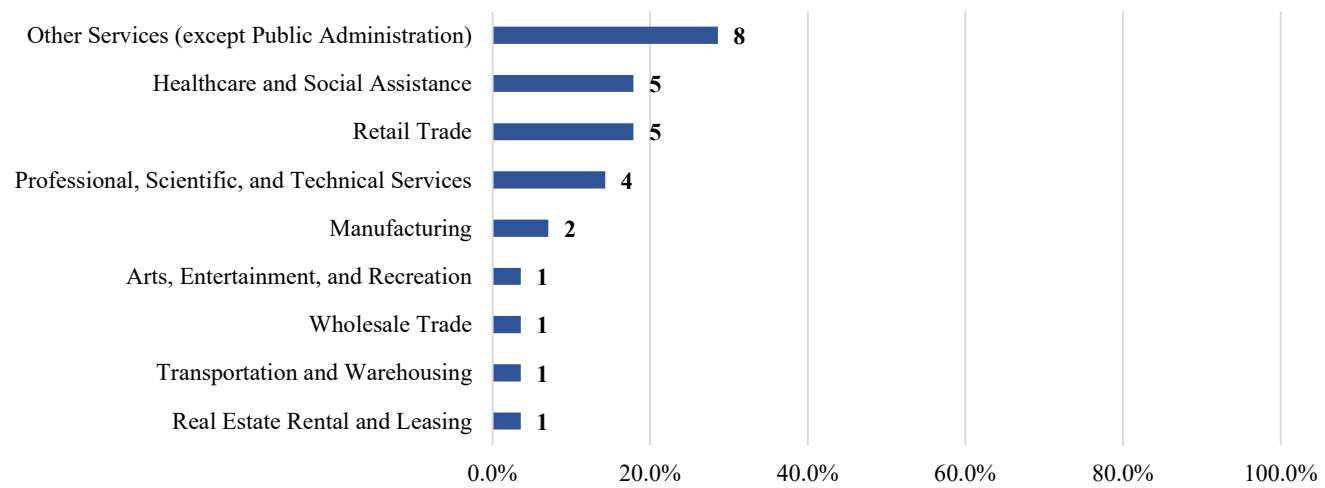


# JACKSON COUNTY: N = 29



## Breakdown by Industry

- The most commonly reported industry was Other Services (except Public Administration) (28.6%) followed by, Healthcare and Social Assistance (17.9%), Retail Trade (17.9%), and Professional Scientific and Technical Services (14.3%).

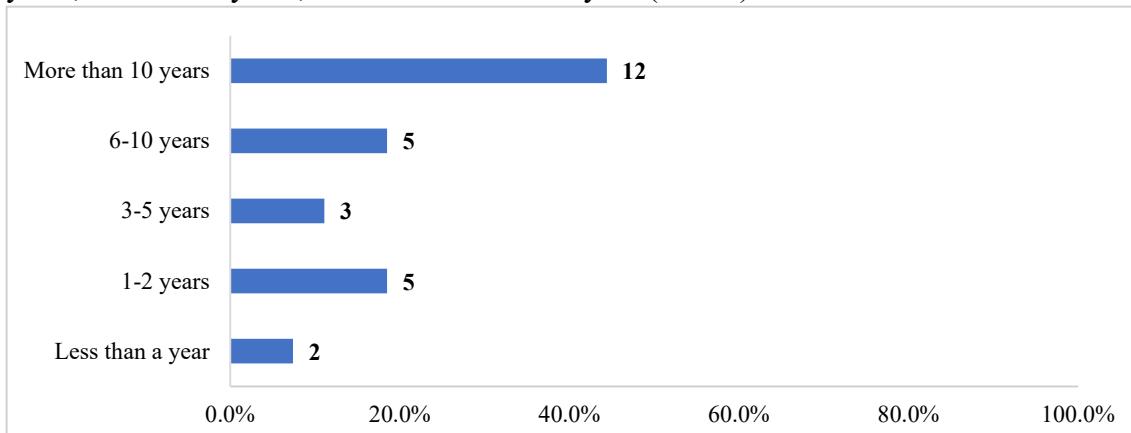


## Ownership

- Respondents were asked how they would characterize the ownership of their business. Most respondents reported that their business was locally owned (n = 22), followed by woman-owned (n = 7), and other (e.g., non-profit; n = 3)

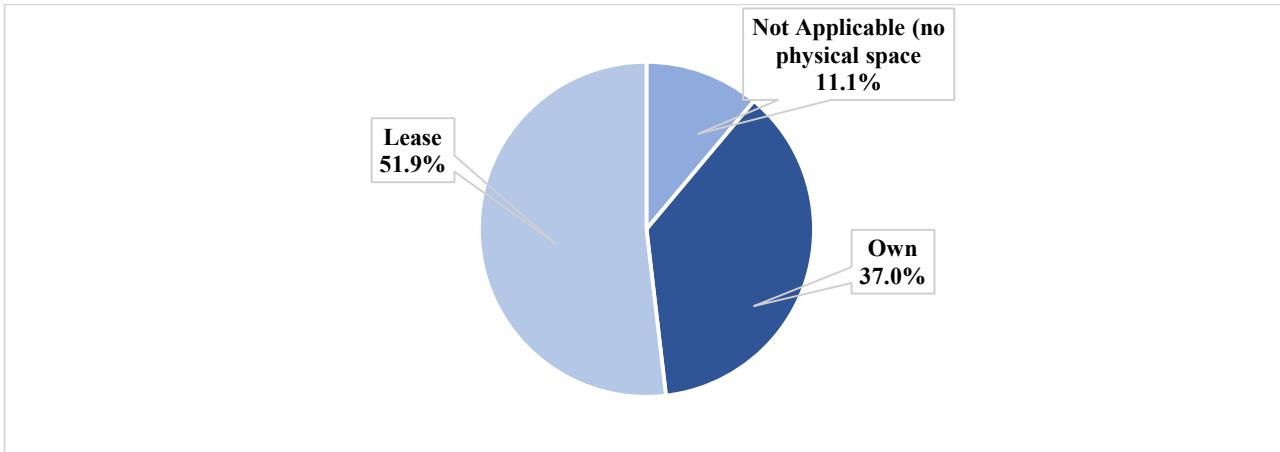
## Length of Operation

- When asked about length of operation, the majority (44.4%) of business owners reported that they have been operating more than 10 years. 18.5% have been operating 6-10 years, 11.1% 3-5 years, 18.5% 1-2 years, and 7.4% less than a year (n = 27).



## Workspace

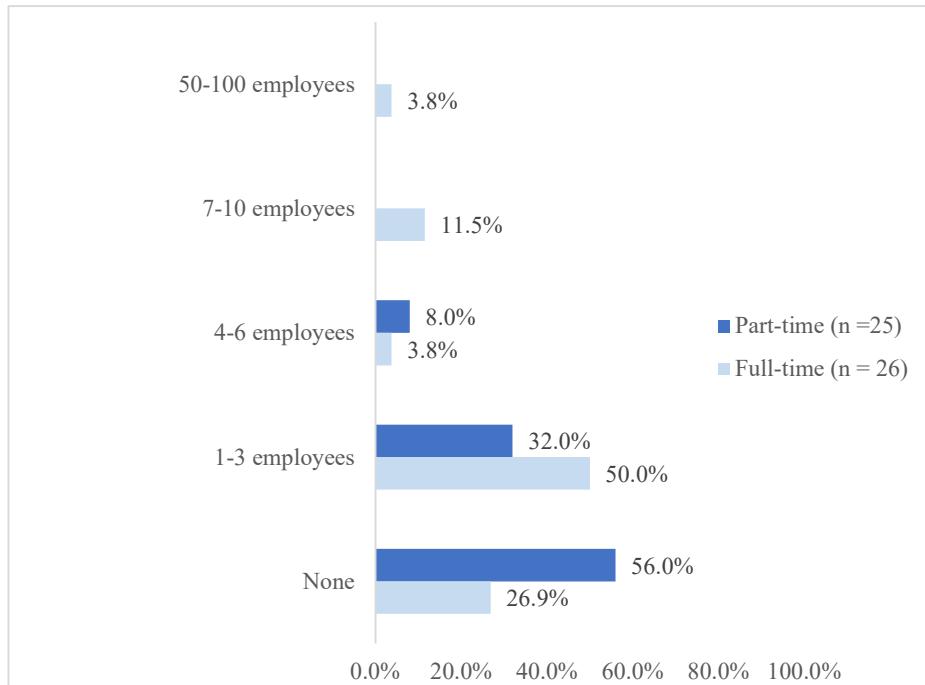
- Most respondents (51.9%) lease their workspace, 37.0% own their workspace and 11.1% stated that they do not have a physical workspace (n = 27).



- Of respondents who lease their workspace (n = 14), 64.3% stated that they did not ask for rent relief, 7.1% stated that rent relief is not necessary at this time, 14.3% stated that they asked but did not receive rent relief, and 14.3% stated they received rent relief.

## Employees

- When respondents were asked how many full-time and part-time employees they have, the most frequently reported number of full-time employees was 1 (32.0%) and not having any part-time employees (56.0%).

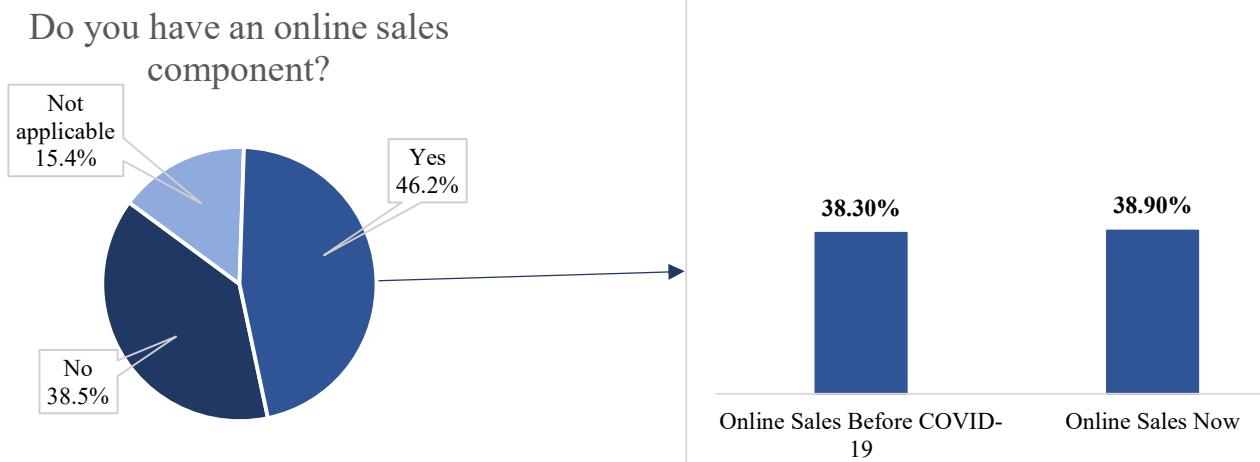


- Participants were asked how many employees they had to lay-off and furlough so far, as a result of COVID-19.
  - 68.0% did not have to lay off anyone, 8.0% laid off 1 employee, 8.0% laid off 2 employees, 4.0% laid off 7 employees, 4.0% laid off 12 employees, and 4.0% laid off 18 employees (n = 25)
  - 72.0% did not have to furlough anyone, 4.0% furloughed 1 employee, 12% furloughed 2 employees, 4.0% furloughed 7 employees, 4.0% furloughed 12 employees (n = 25).

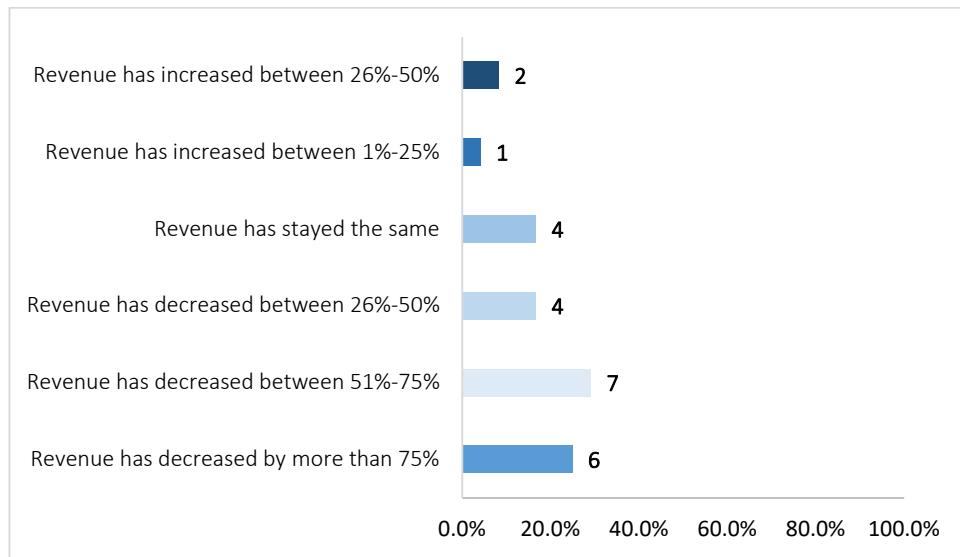


## Revenue

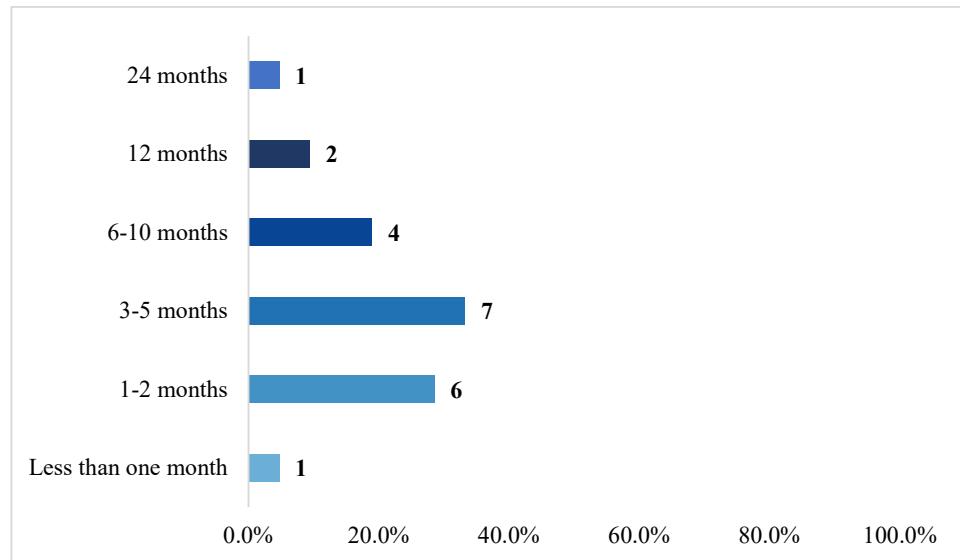
- 38.5% of respondents reported that they do not have an online sales component. 46.2% of respondents do have an online sales component and 15.4% stated that online sales were not applicable (n = 26).
- The average amount of revenue generated from online sales before COVID-19 was 38.30% (n = 10); whereas the average amount of revenue generated from online sales now is 38.90% (n = 11), indicating a .60% increase.



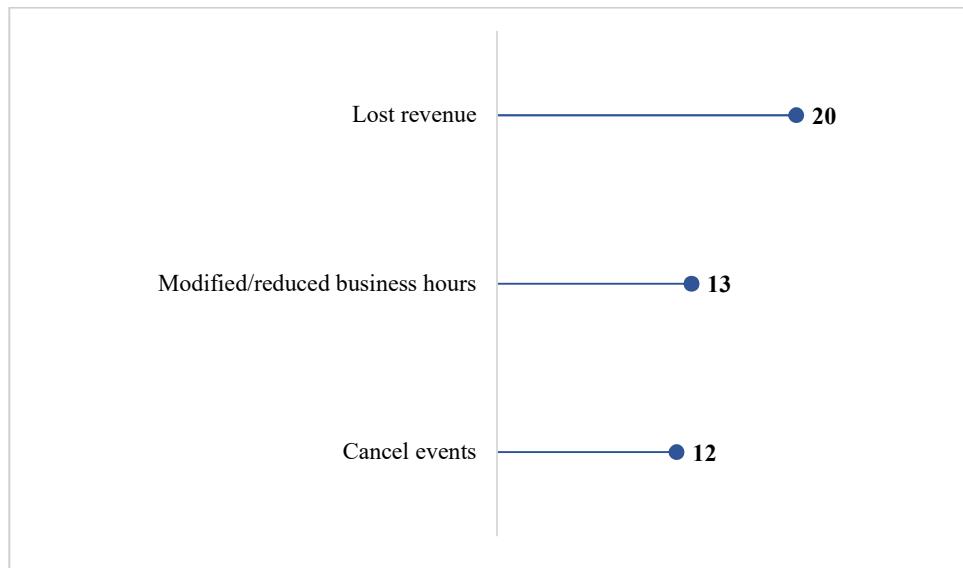
- Participants were asked about revenue changes since March 2020 due to COVID-19. The majority (70.9%) of participants reported a revenue decrease, 16.7% of respondents reported that revenue stayed the same and 12.5% of respondents reported a revenue increase (n = 24).



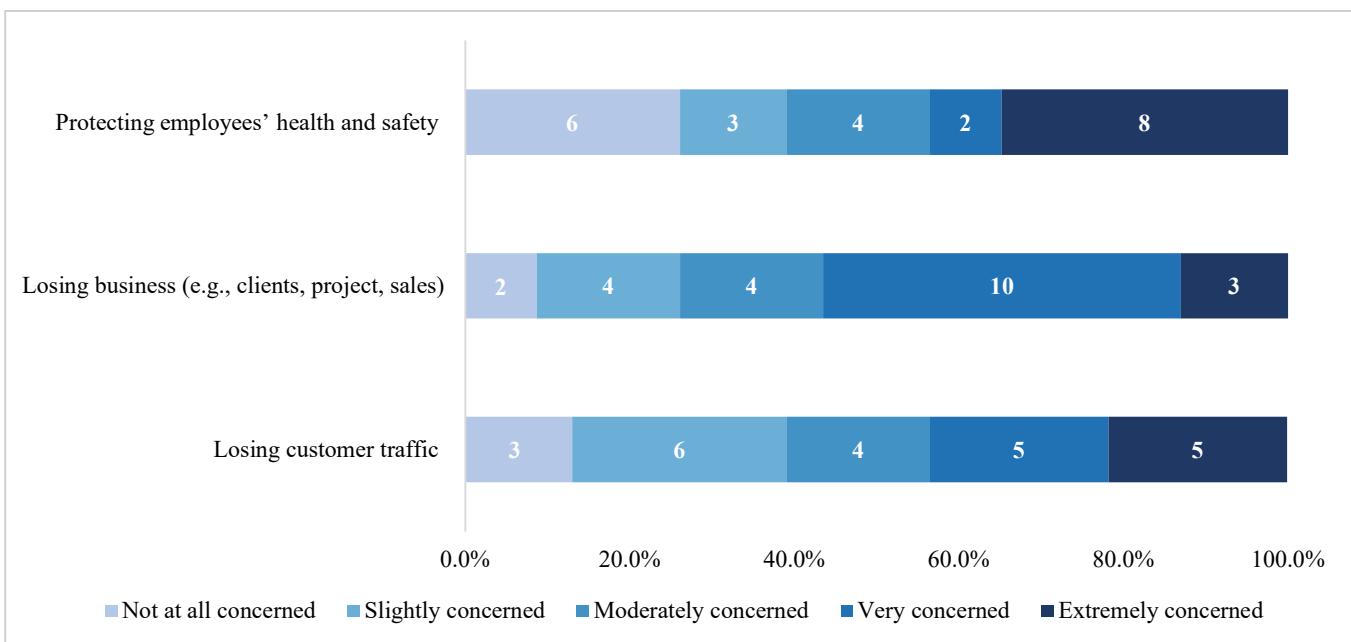
- Participants were asked, “How many months can you stay afloat with the funds you currently have at your disposal?” 14.2% indicated that their business would be at risk of closing after 12-24 months, 38.8% indicated 3-5 months, and 33.3% indicated 1-2 months, (n = 21).



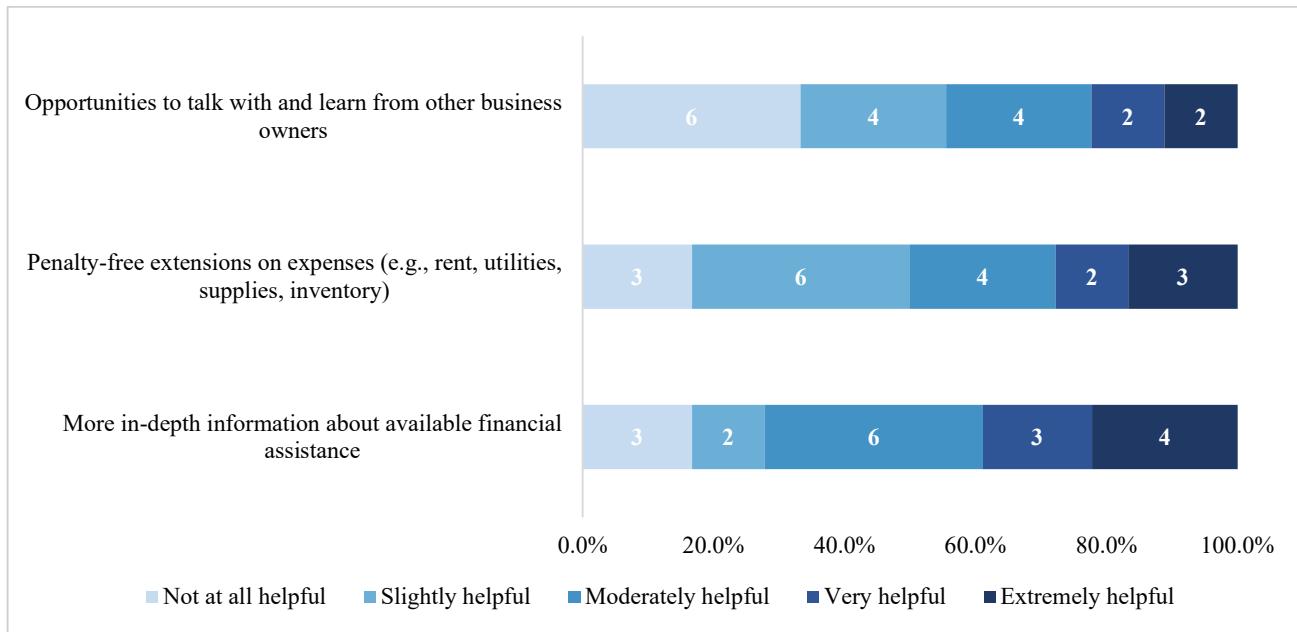
- When asked how COVID-19 has affected their business or organization, respondents most frequently reported revenue losses ( $n = 20$ ), modification/reductions of business hours ( $n = 13$ ) and cancel events ( $n = 12$ ).



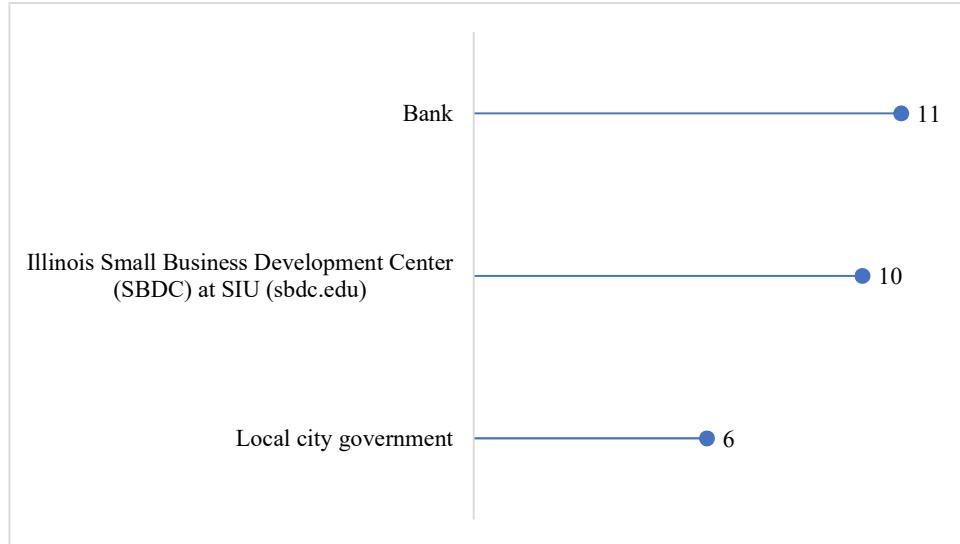
- Participants reported the extent to which they were concerned about several outcomes due to COVID-19 on a 1 (*Not at all concerned*) to 5 (*Extremely concerned*) rating scale. The top three responses with the highest average concern rating were: protecting employees' health and safety ( $M = 3.52$ ;  $n = 23$ ), losing business ( $M = 3.43$ ;  $n = 23$ ), losing customer traffic ( $M = 3.25$ ;  $n = 23$ ).



- Respondents reported the extent to which several forms of assistance would be helpful to them or their business using a 1 (*Not at all helpful*) to 5 (*Extremely helpful*) rating scale. The top three responses with the highest average helpfulness rating were: more in-depth information about available financial assistance ( $M = 3.07$ ;  $n = 18$ ), opportunities to talk with and learn from other business owners ( $M = 2.90$ ;  $n = 18$ ), and penalty-free extensions on expenses ( $M = 2.90$ ;  $n = 18$ ).



- Respondents were asked which local resources they have accessed for assistance during this time. The top three responses are reported below.



# JEFFERSON COUNTY: N = 5



## Ownership

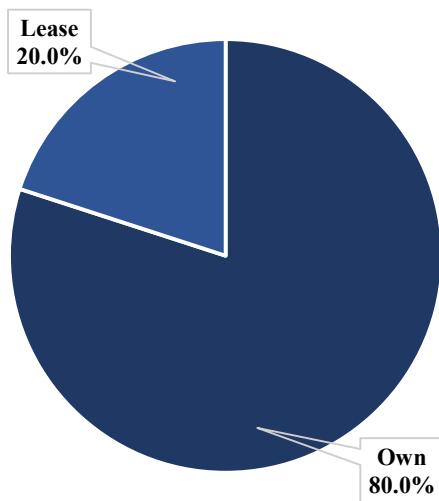
- Respondents were asked how they would characterize the ownership of their business. Most respondents reported that their business was locally owned (n = 4), followed by woman-owned (n = 2).

## Length of Operation

- When asked about length of operation, 60% of business owners reported that they have been operating more than 10 years (n = 3) and 40% reported they have been operating for 3-5 years (n = 2)

## Workspace

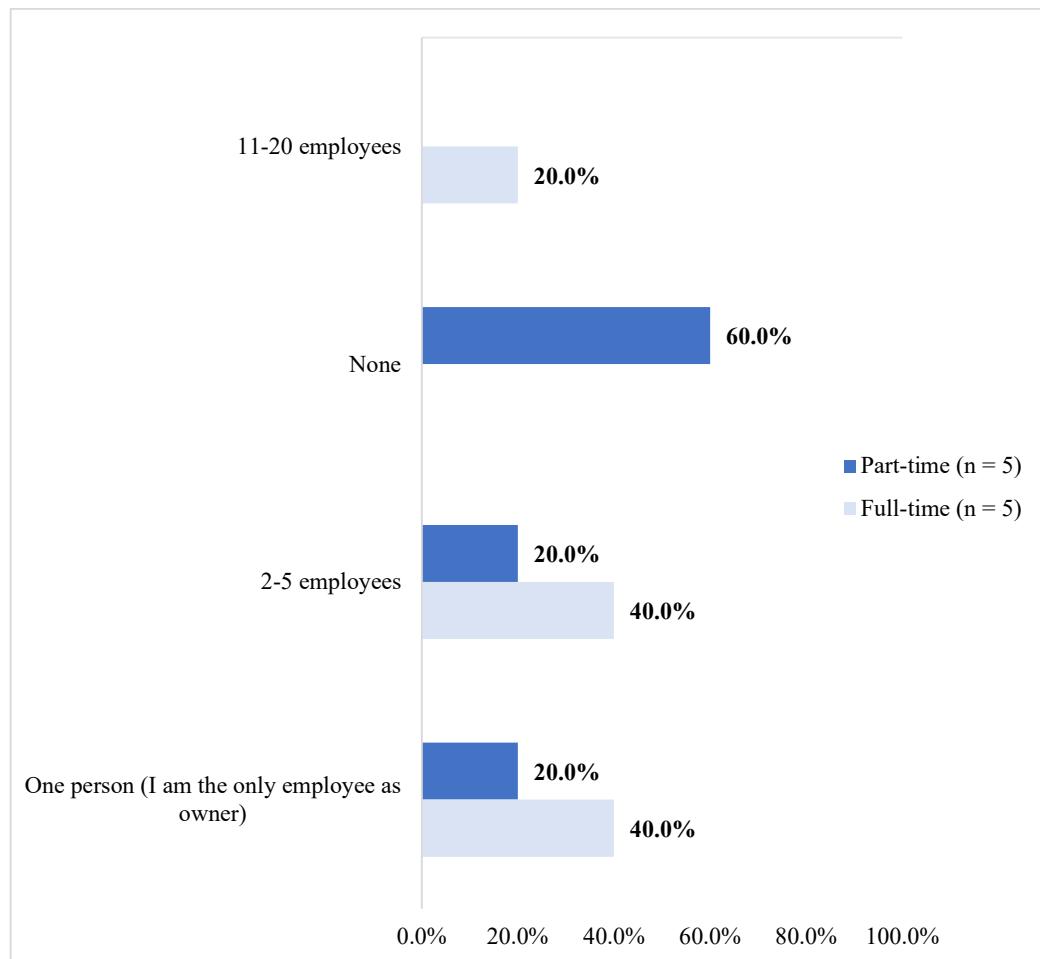
- The majority (80%) of respondents own their workspace and 20% lease their workspace (n = 5).



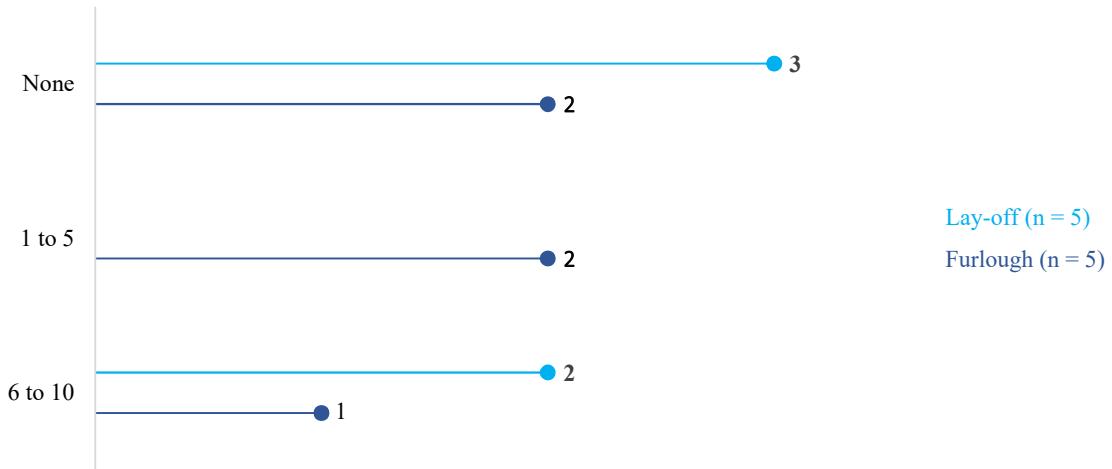
- The respondent who leases their workspace (n = 1), stated that rent relief is not necessary at this time.

## Employees

- When respondents were asked how many full-time and part-time employees they have, the most frequently reported number of full-time employees was one person (I am the only employee as owner; 40%) and the most frequently reported number of part-time employees was 0 (60%).

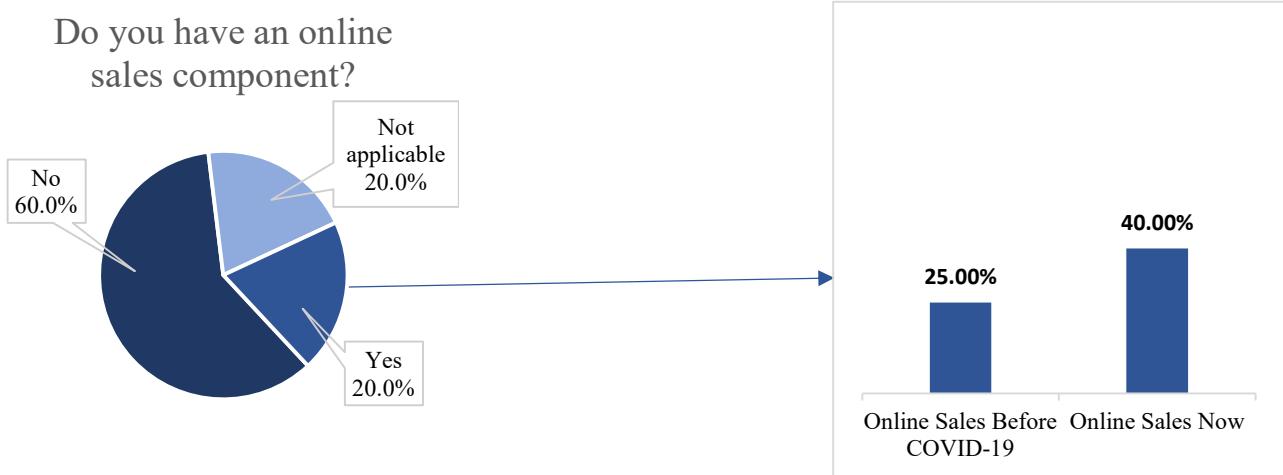


- Participants were asked how many employees they had to lay-off and furlough so far, as a result of COVID-19.
  - 60% did not have to lay off any employees, 40% laid off 6-10 employees, 40% did not have to furlough any employees, 40% furloughed 1-5 employees, and 20% furloughed 6-10 employees.



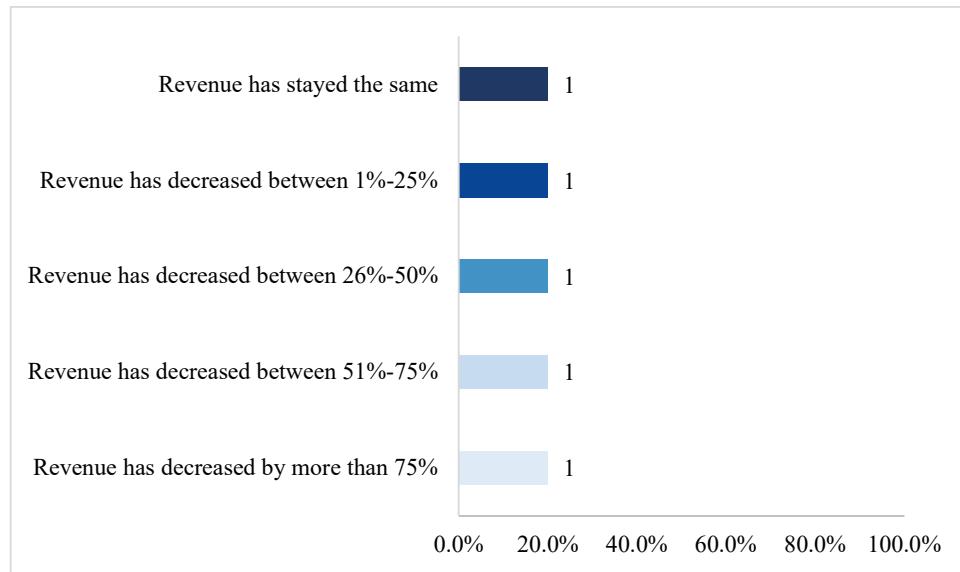
## Revenue

- More than half of respondents reported that they do not have an online sales component (60%). 20% of respondents do have an online sales component and 20% stated that online sales were not applicable (n = 5).

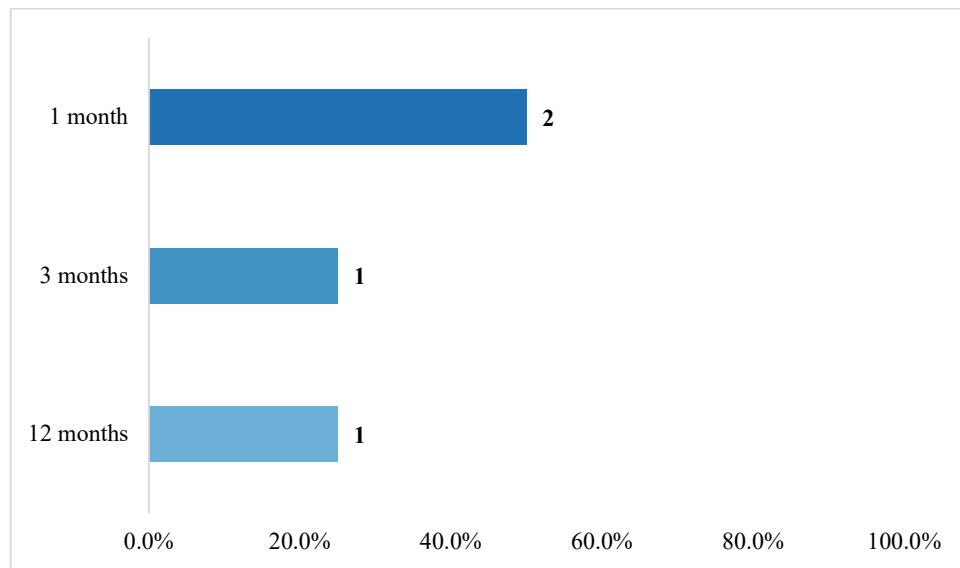


- The average amount of revenue generated from online sales before COVID-19 was 25% (n = 1); whereas the average amount of revenue generated from online sales now is 40% (n = 1), indicating a 15% increase.

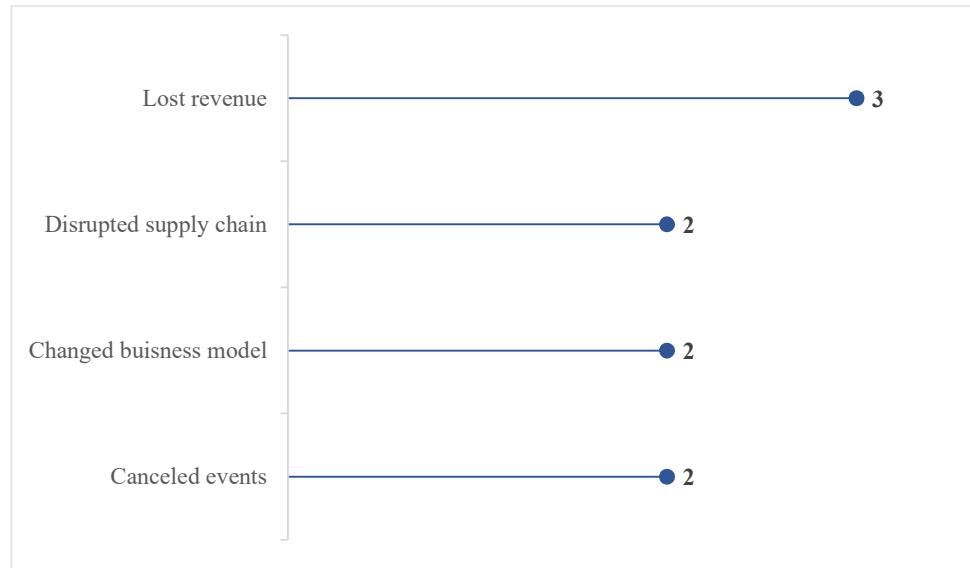
- Participants were asked about revenue changes since March 2020 due to COVID-19. The majority (80%) of participants reported a revenue decrease, the other 20% of respondents reported that revenue stayed the same (n = 5).



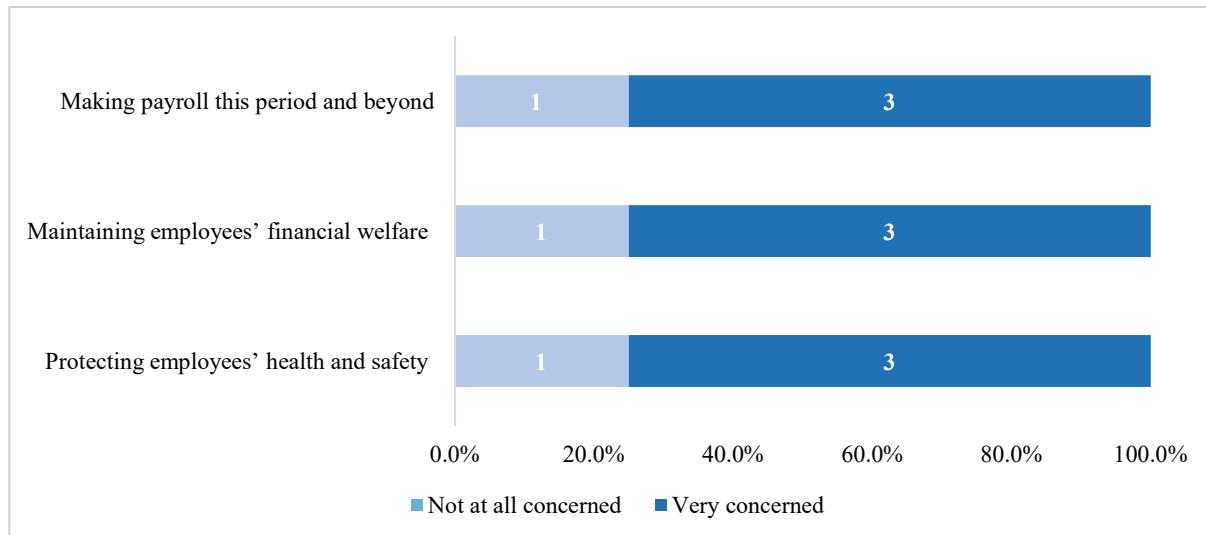
- Participants were asked, "How many months can you stay afloat with the funds you currently have at your disposal?" 50% of respondents indicated that their business could stay afloat for 1 month, 25% indicated 3 months, and 25% indicated 12 months (n = 4).



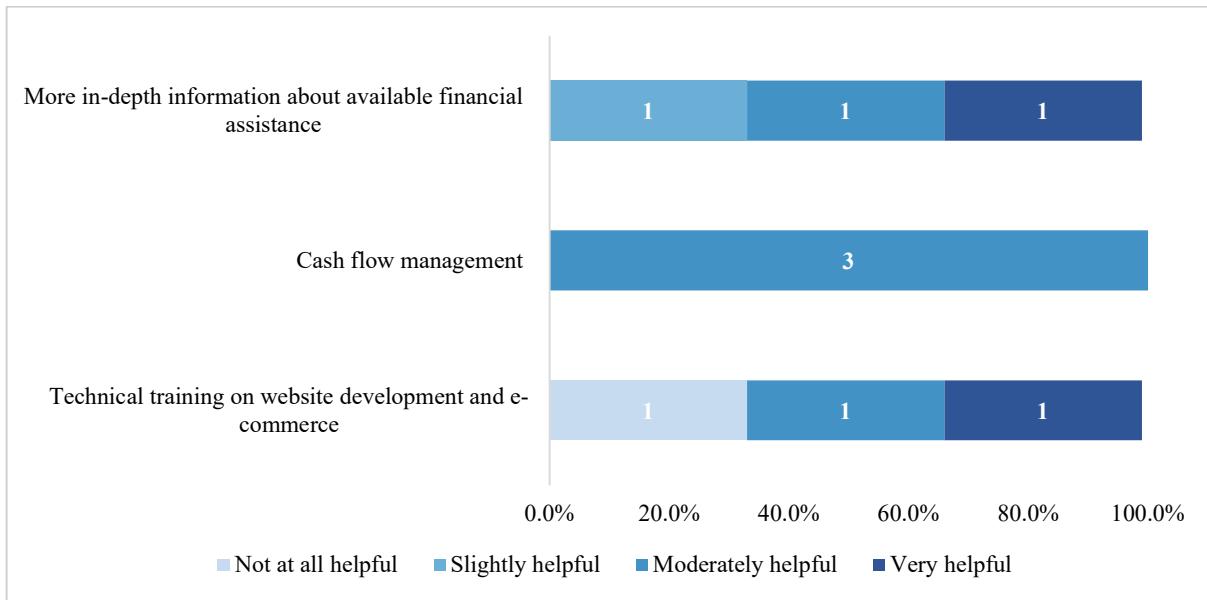
- When asked how COVID-19 has affected their business or organization, respondents most frequently reported revenue losses (n = 3), disrupted supply chain (n = 2), changed business model (n = 2), and cancelled events (n = 2).



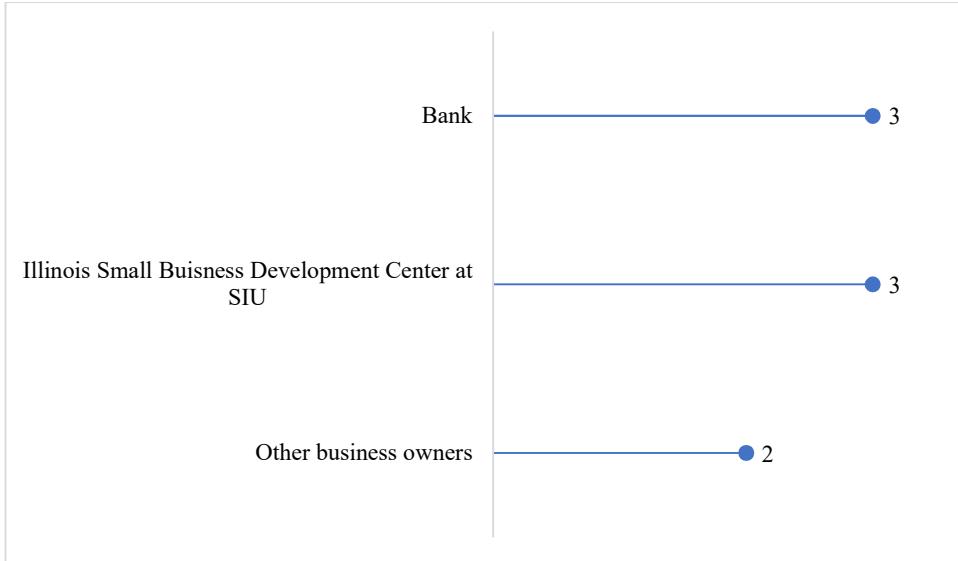
- Participants reported the extent to which they were concerned about several outcomes due to COVID-19 on a 1 (*Not at all concerned*) to 5 (*Extremely concerned*) rating scale. The top three responses with the highest average concern rating were: making payroll this period and beyond ( $M = 3.25$ ; n = 4), maintaining employees' financial welfare ( $M = 3.25$ ; n = 4), and protecting employees' health and safety ( $M = 3.25$ ; n = 4).



- Respondents reported the extent to which several forms of assistance would be helpful to them or their business using a 1 (*Not at all helpful*) to 5 (*Extremely helpful*) rating scale. The top three responses with the highest average helpfulness rating were: more in-depth information about available financial assistance ( $M = 3.00$ ;  $n = 3$ ), cash flow management ( $M = 3.00$ ;  $n = 3$ ), and technical training on website development and e-commerce ( $M = 2.67$ ;  $n = 3$ ).



- Respondents were asked which local resources they accessed for assistance during this time. The top three responses are reported below.



# PERRY COUNTY: N = 6

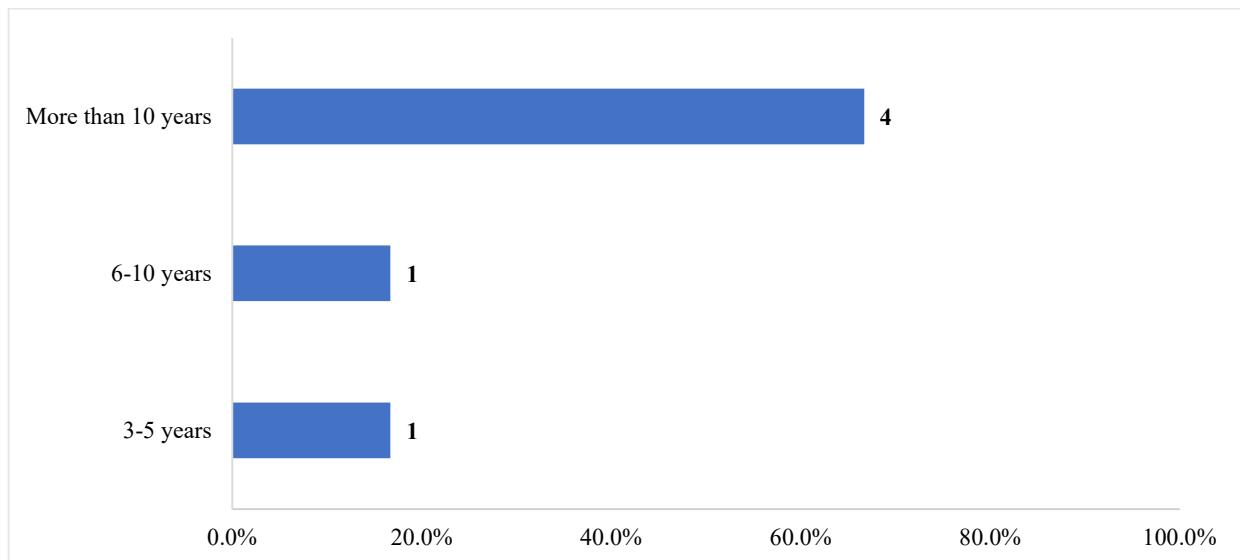


## Ownership

- Respondents were asked how they would characterize the ownership of their business. Most respondents reported that their business was locally owned (n = 5), followed by woman-owned (n = 1).

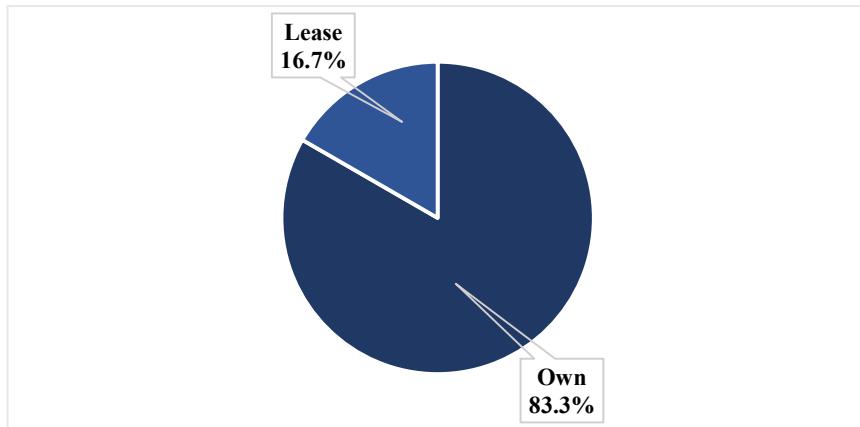
## Length of Operation

- When asked about length of operation, the majority (66.7%) of business owners reported that they have been operating more than 10 years. 16.7% have been operating 6-10 years, and 16.7% have been operating for 3-5 years (n = 6).



## Workspace

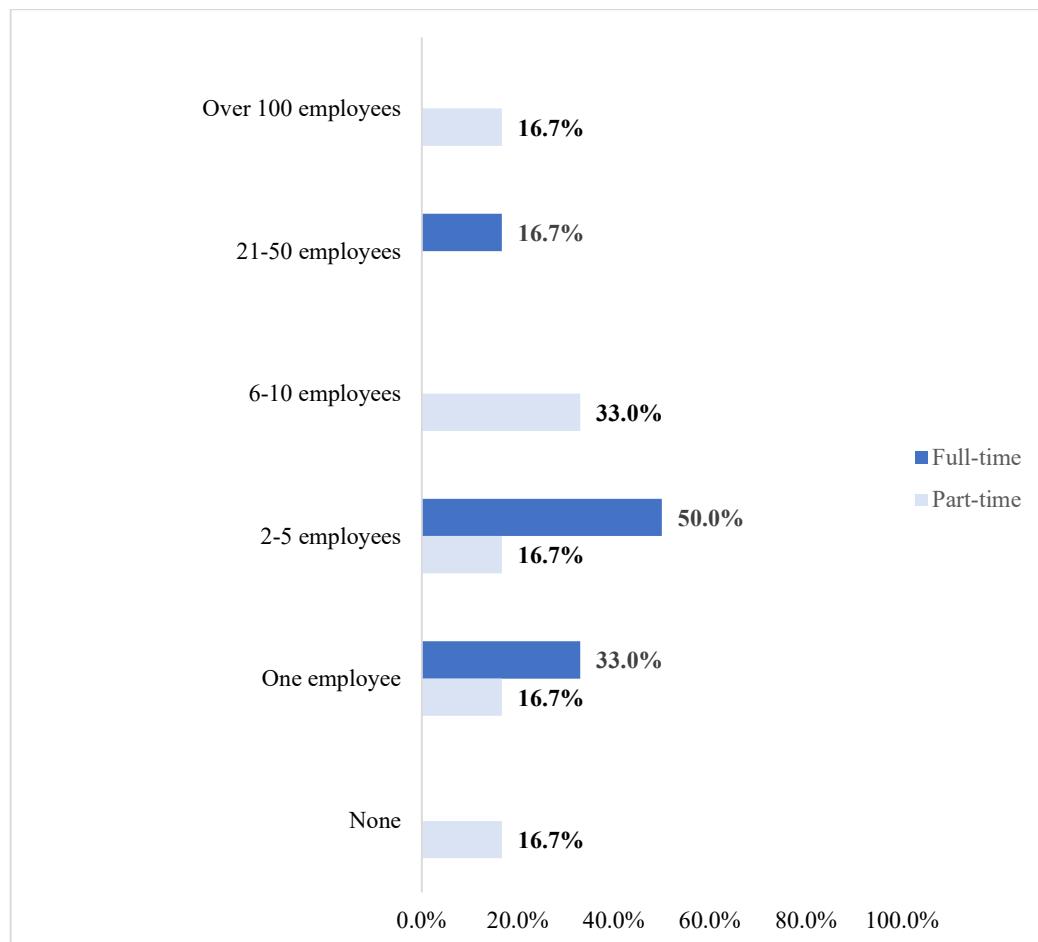
- The majority (83.3%) of respondents own their workspace and 16.7% lease their workspace (n = 6).



- The respondents who lease their workspace (n = 1), did not ask for rent relief.

## Employees

- When respondents were asked how many full-time and part-time employees they have, each respondent reported a different number ranging from 0-250. The most frequently reported number of part-time employees was 6-10 employees (33.3%), while 2-5 employees was the most common number of full-time workers (50.0%).

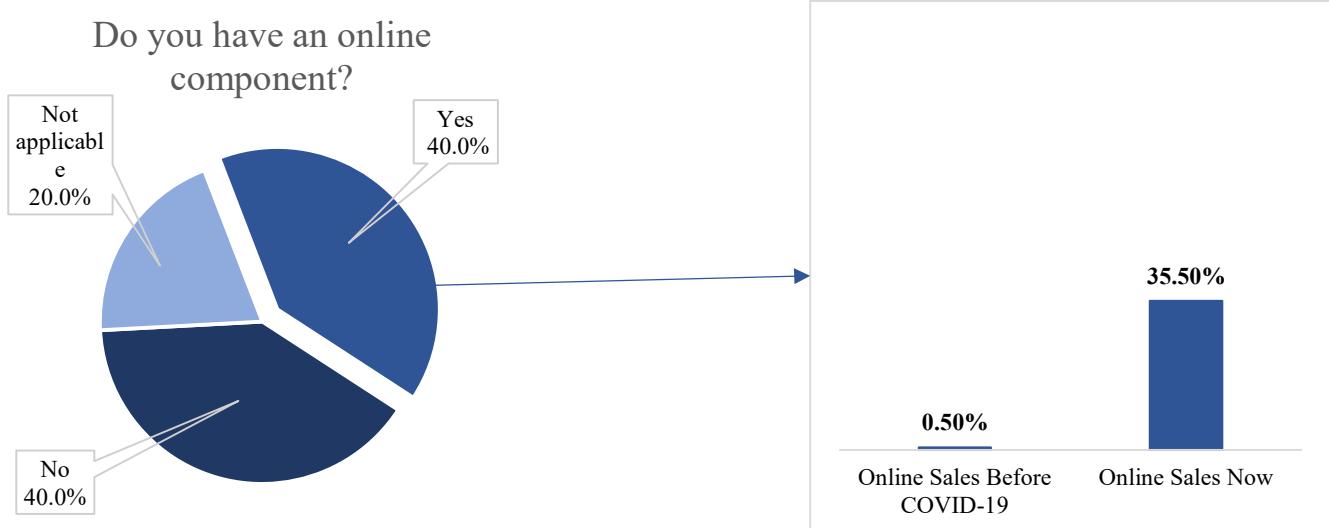


- Participants were asked how many employees they had to lay-off and furlough so far, as a result of COVID-19.
  - 80% did not have to lay off any employees, and 20% laid off 3 employees.
  - 80% did not have to furlough any employees, and 20% furloughed 4 employees.

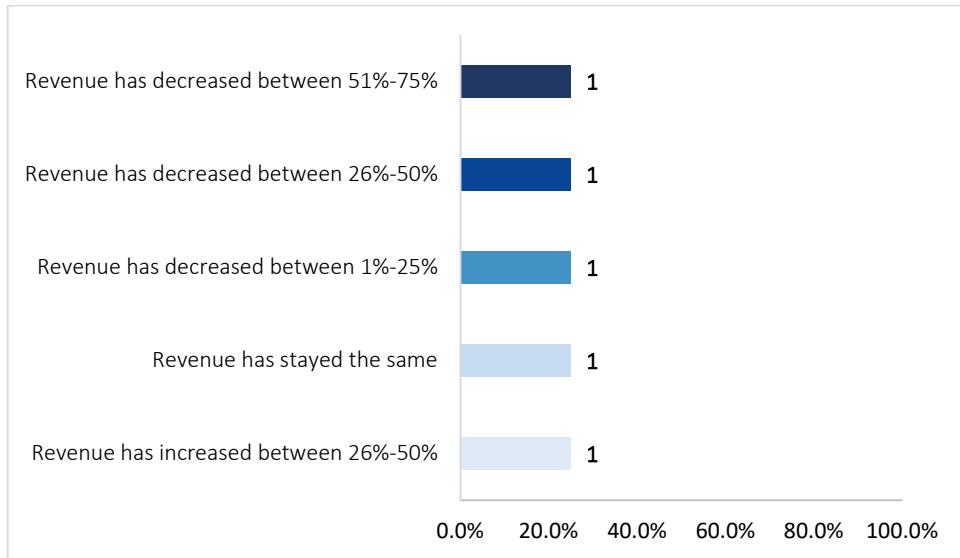


## Revenue

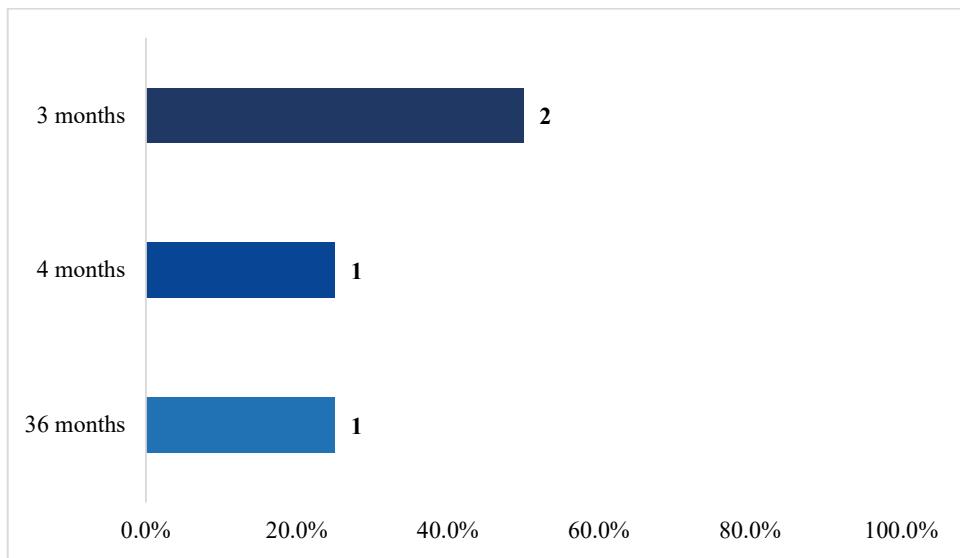
- Less than half of respondents reported that they do not have an online sales component (40%). 40% of respondents do have an online sales component and 20% stated that online sales were not applicable (n = 5).
- The average amount of revenue generated from online sales before COVID-19 was 0.5% (n = 2); whereas the average amount of revenue generated from online sales now is 35.5% (n = 2), indicating a 35% increase.



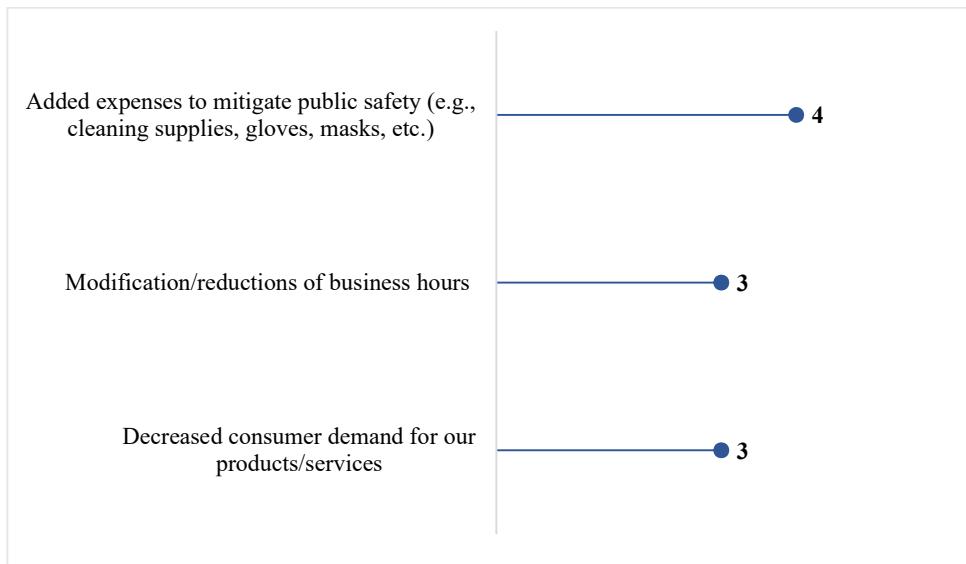
- Participants were asked about revenue changes since March 2020 due to COVID-19. Over half of the participants (60%) reported a revenue decrease (n = 3). Of the respondents whose revenue did not decrease, 16.7% of respondents reported revenue staid the same and 16.7% reported an increase in revenue (n = 2).



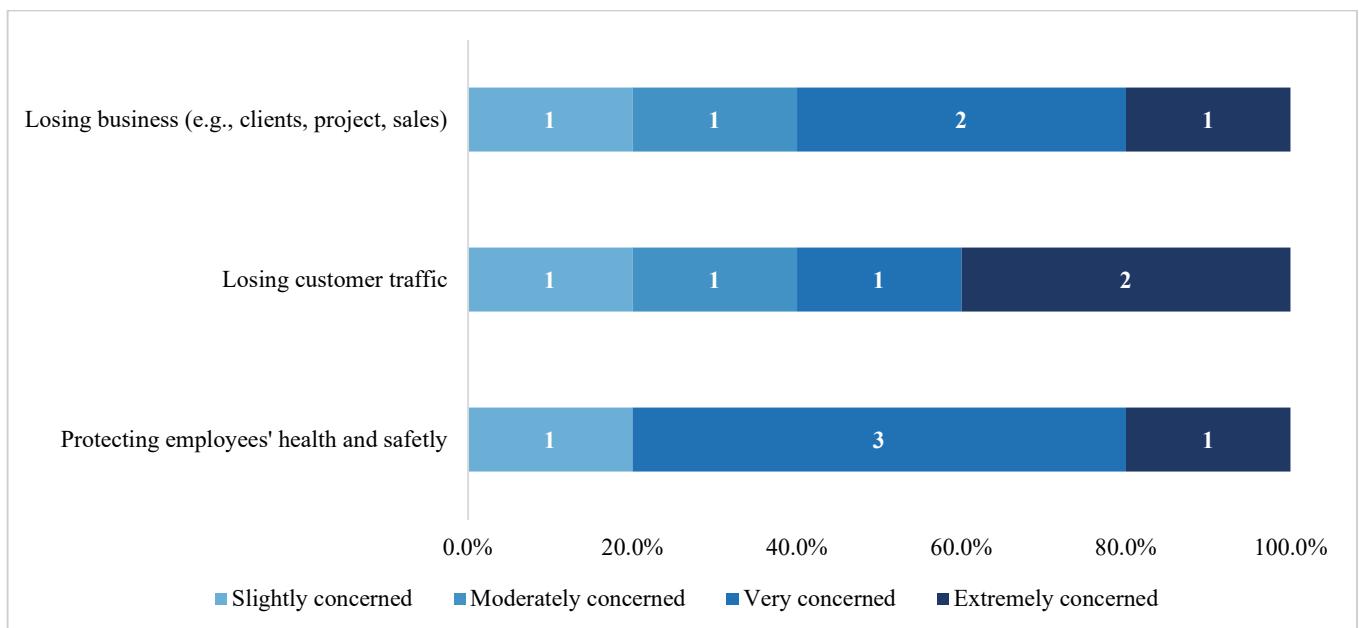
- Participants were asked, "How many months can you stay afloat with the funds you currently have at your disposal?" The majority (75%) of respondents reported they could stay afloat for 3-4 months, and 25% indicated that their business would be at risk of closing after 36 months (n = 4).



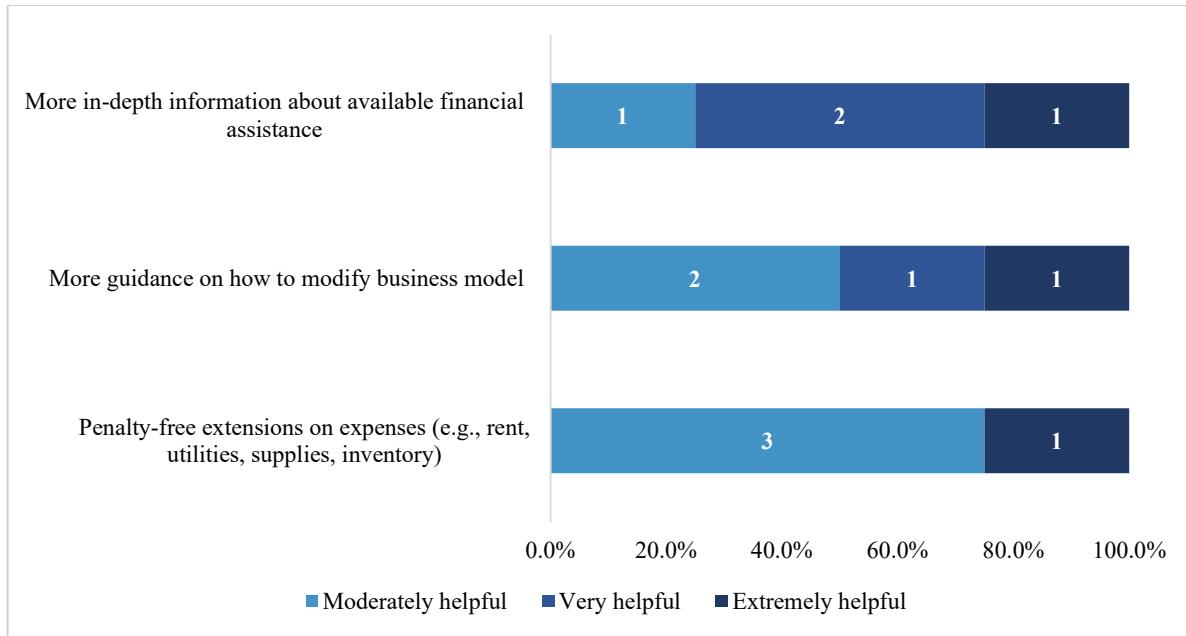
- When asked how COVID-19 has affected their business or organization, respondents most frequently reported added expenses to mitigate public safety (e.g., cleaning supplies, gloves, masks, etc.) ( $n = 4$ ), modification/reductions of business hours ( $n = 3$ ), and lost revenue ( $n = 3$ ).



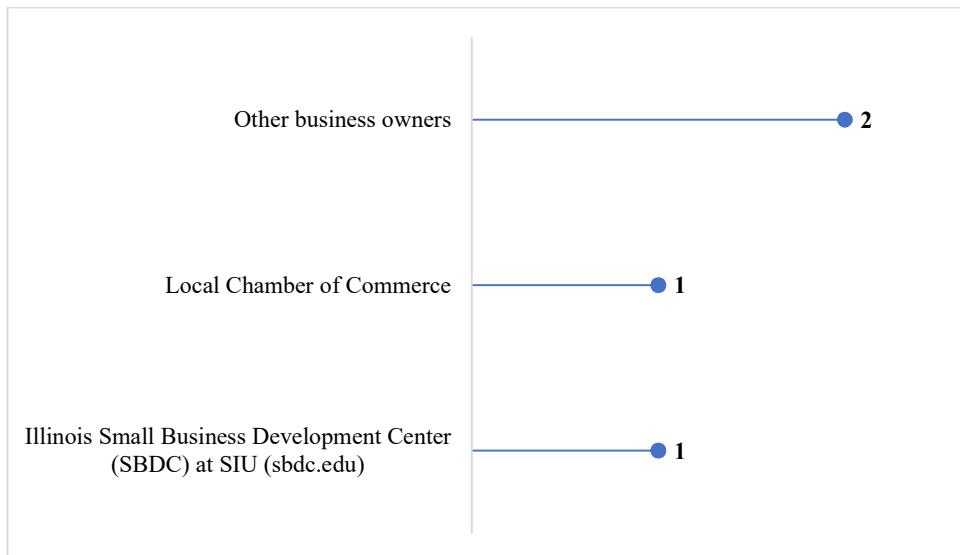
- Participants reported the extent to which they were concerned about several outcomes due to COVID-19 on a 1 (*Not at all concerned*) to 5 (*Extremely concerned*) rating scale. The top three responses with the highest average concern rating were: losing business ( $M = 3.95$ ;  $n = 5$ ), losing customer traffic ( $M = 3.80$ ;  $n = 5$ ), and protecting employees' health and safety ( $M = 3.80$ ;  $n = 5$ ).



- Respondents reported the extent to which several forms of assistance would be helpful to them or their business using a 1 (*Not at all helpful*) to 5 (*Extremely helpful*) rating scale. The top three responses with the highest average helpfulness rating were: more in-depth information about available financial assistance ( $M = 4.00$ ;  $n = 4$ ), more guidance on how to modify business model ( $M = 3.75$ ;  $n = 4$ ), and penalty-free extensions on expenses ( $M = 3.50$ ;  $n = 4$ ).



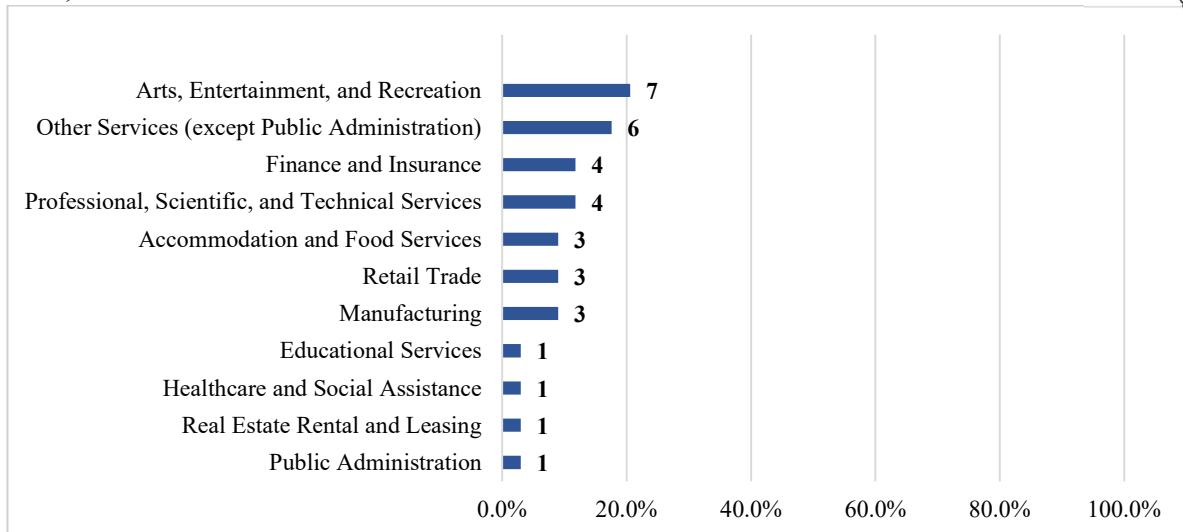
- Respondents were asked which local resources they accessed for assistance during this time. The top three responses are reported below.



# WILLIAMSON COUNTY: N = 34

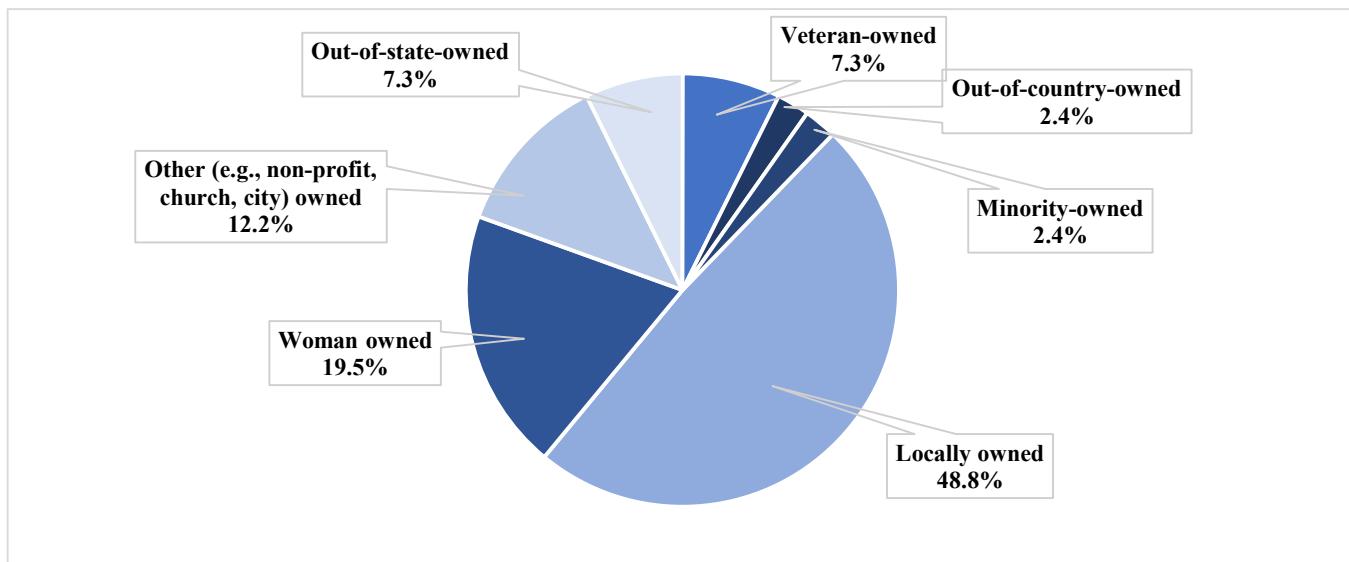
## Breakdown by Industry

- The most commonly reported industry was Arts, Entertainment, and Recreation (20.6%), followed by Other Services (except Public Administration) (17.6%), Professional, Scientific, and Technical Services (11.8%), and Finance and Insurance (11.8%).



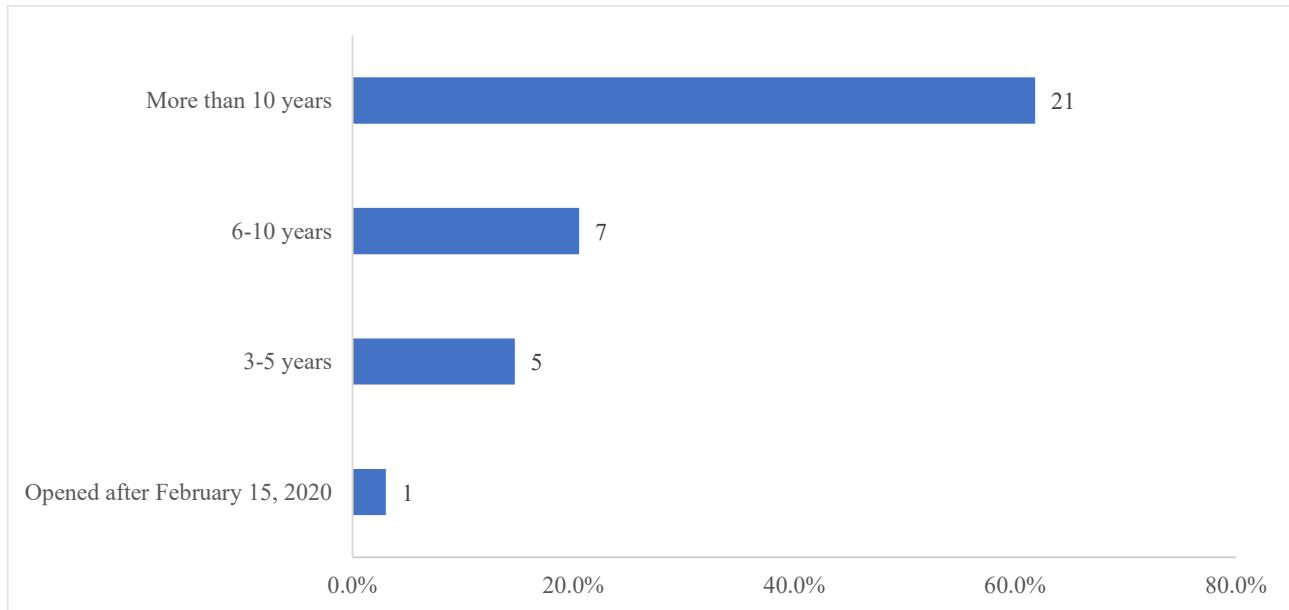
## Ownership

- Respondents were asked how they would characterize the ownership of their business. Most respondents reported that their business was locally owned (n = 20), followed by woman-owned (n = 8), other (e.g., non-profit, church, city owned; n = 5), out-of-state-owned (n = 3), veteran-owned (n = 3), out-of-country-owned (n = 1), and minority-owned (n = 1).



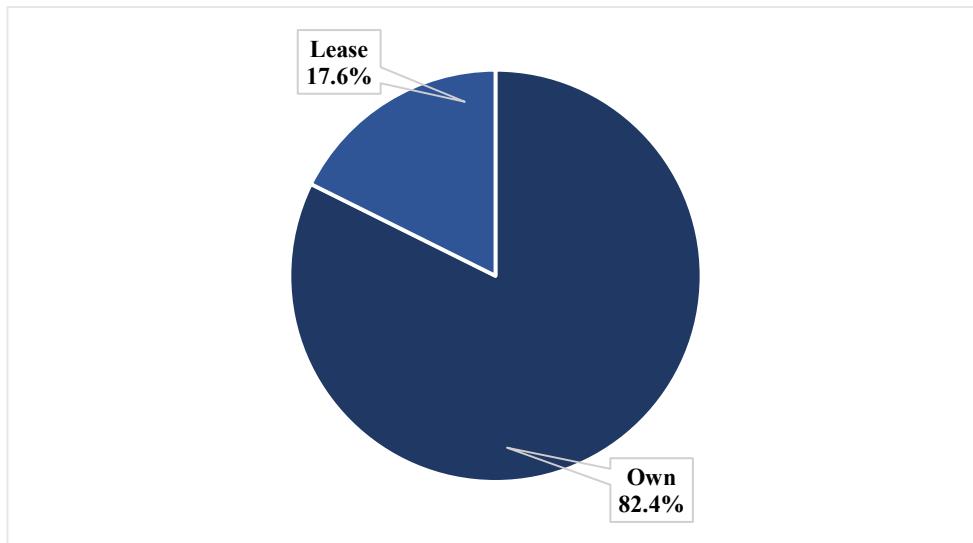
## Length of Operation

- When asked about length of operation, the majority (61.8%) of business owners reported that they have been operating more than 10 years. 20.6% have been operating 6-10 years, 14.7% 3-5 years, and 2.9% opened after February 15, 2020 (n = 34).



## Workspace

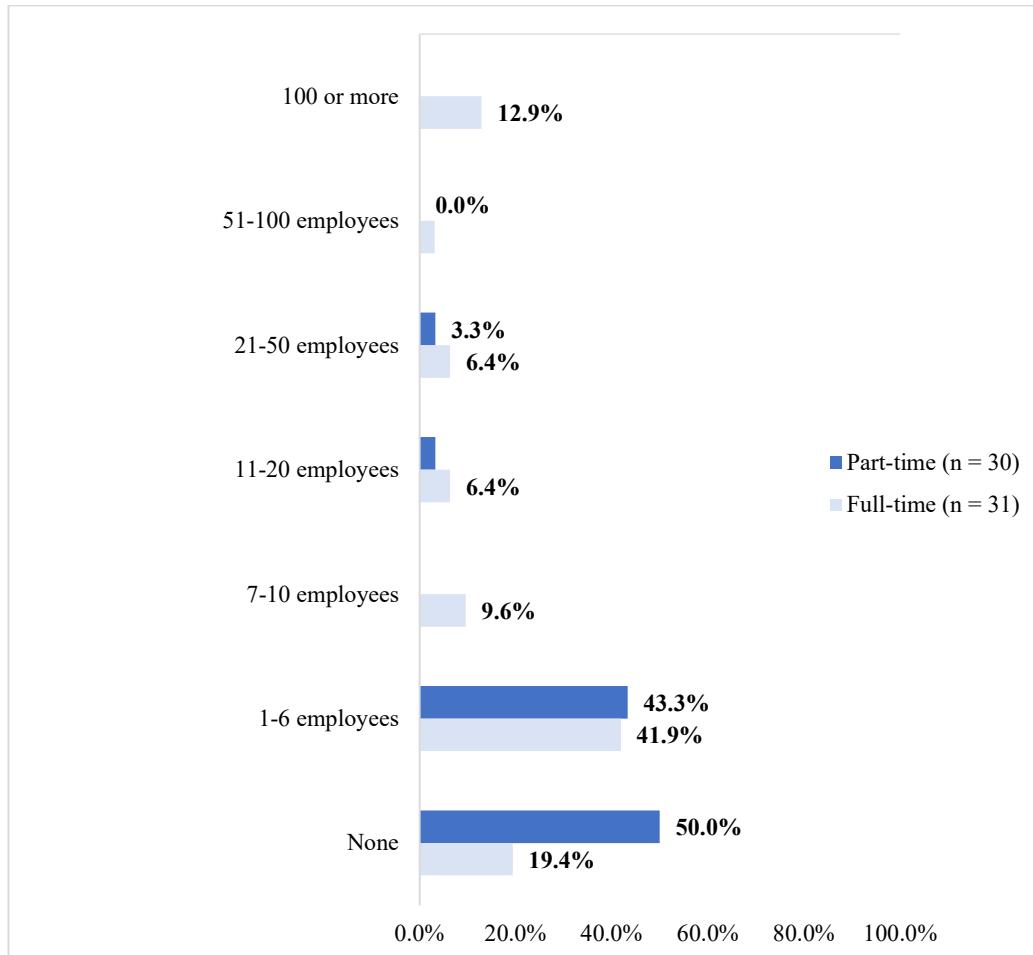
- Most respondents (82.4%) own their workspace, and 17.6% lease their workspace (n = 34).



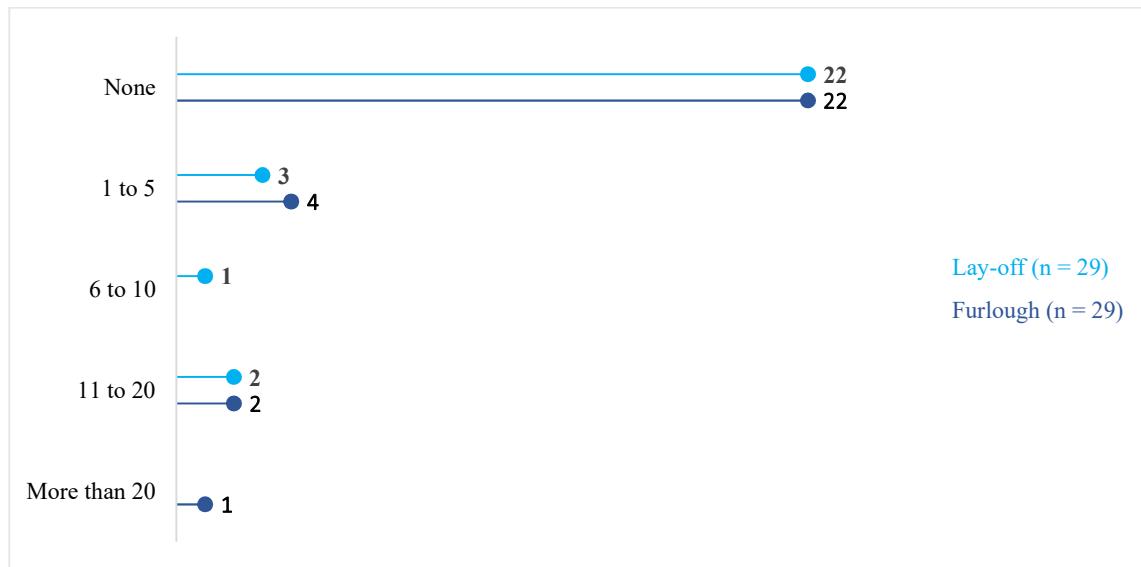
- Of respondents who lease their workspace (n = 6), 33.3% stated that they did not ask for rent relief, and 66.6% stated that rent relief is not necessary at this time.

## Employees

- When respondents were asked how many full-time and part-time employees they have, the most frequently reported numbers for full-time employees was 1-6 employees (41.9%) and not having any part-time employees (50.0%).



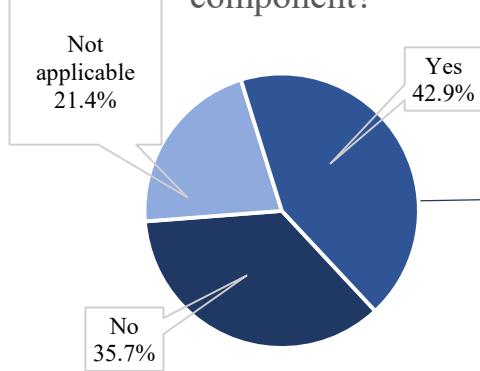
- Participants were asked how many employees they had to lay-off and furlough so far, as a result of COVID-19.
  - 64.7% did not have to lay off anyone, 8.8% laid off 1-5 employees, 2.9% laid off 6-10 employees, and 8.7% laid off 11-20 employees.
  - 64.7% did not have to furlough anyone, 11.7% furloughed 1-5 employees, 5.8% furloughed 11-20 employees, and 2.9% furloughed more than 20 employees.



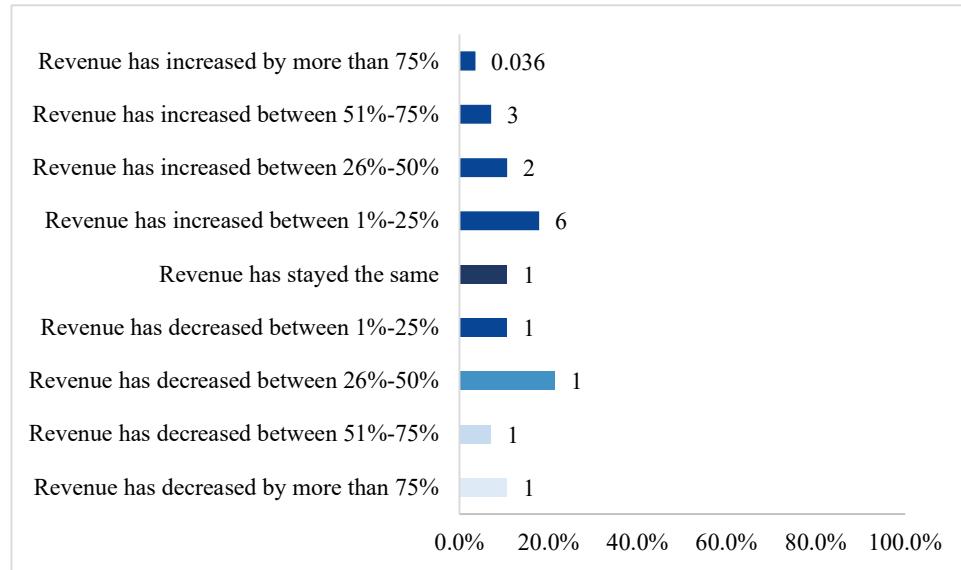
## Revenue

- Less than half of respondents reported that they do not have an online sales component (35.7%). 42.9% of respondents do have an online sales component and 21.4% stated that online sales were not applicable (n = 28).
- The average amount of revenue generated from online sales before COVID-19 was 44% (n = 11); whereas the average amount of revenue generated from online sales now is 63% (n = 8), indicating a 19% increase.

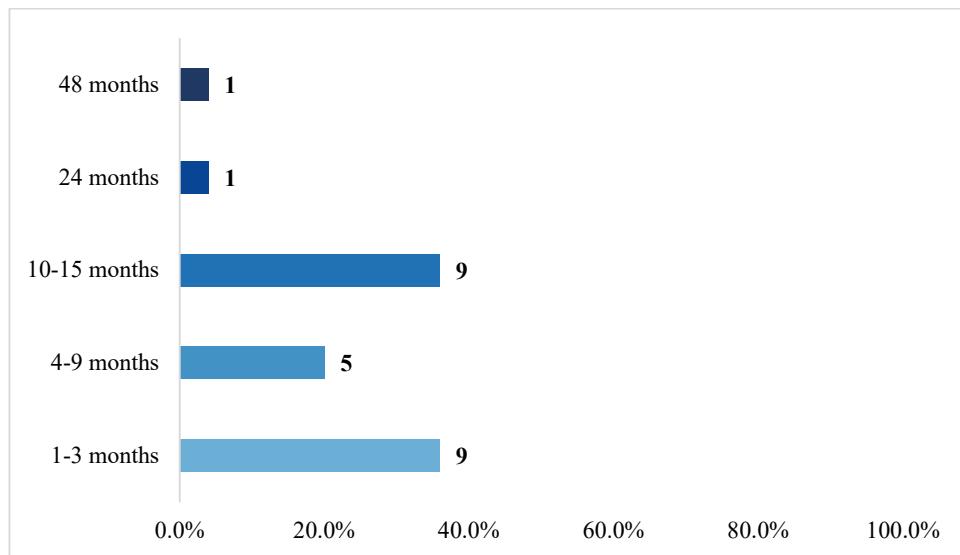
Do you have an online sales component?



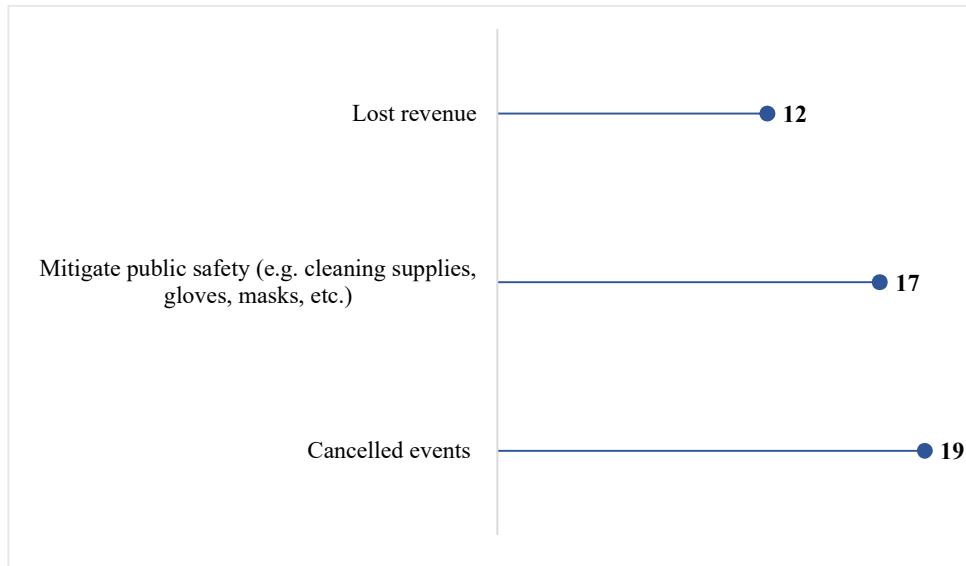
- Participants were asked about revenue changes since March 2020 due to COVID-19. 41.1% of participants reported a revenue decrease, 8.8% of respondents reported that revenue stayed the same and 32.3% of respondents reported a revenue increase (n = 28).



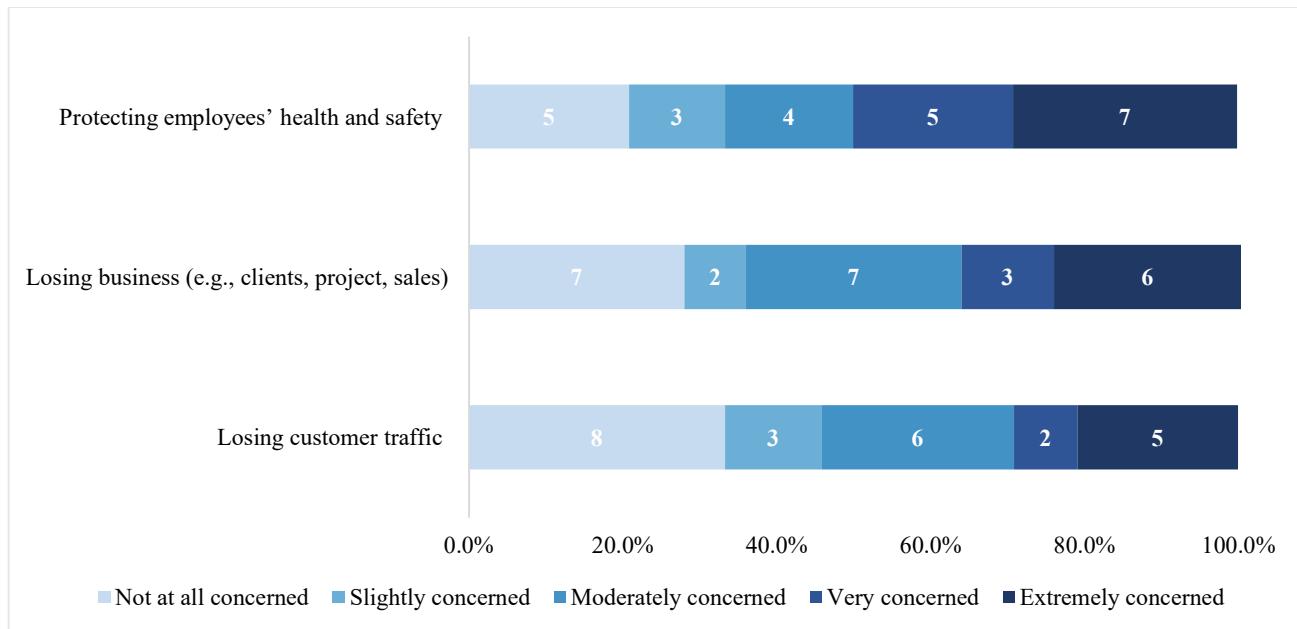
- Participants were asked, “How many months can you stay afloat with the funds you currently have at your disposal?” 36% reported that they can stay afloat for 1-3 months, 20% reported 4-9 months, and 44% reported they could remain open for 12+ months (n = 25).



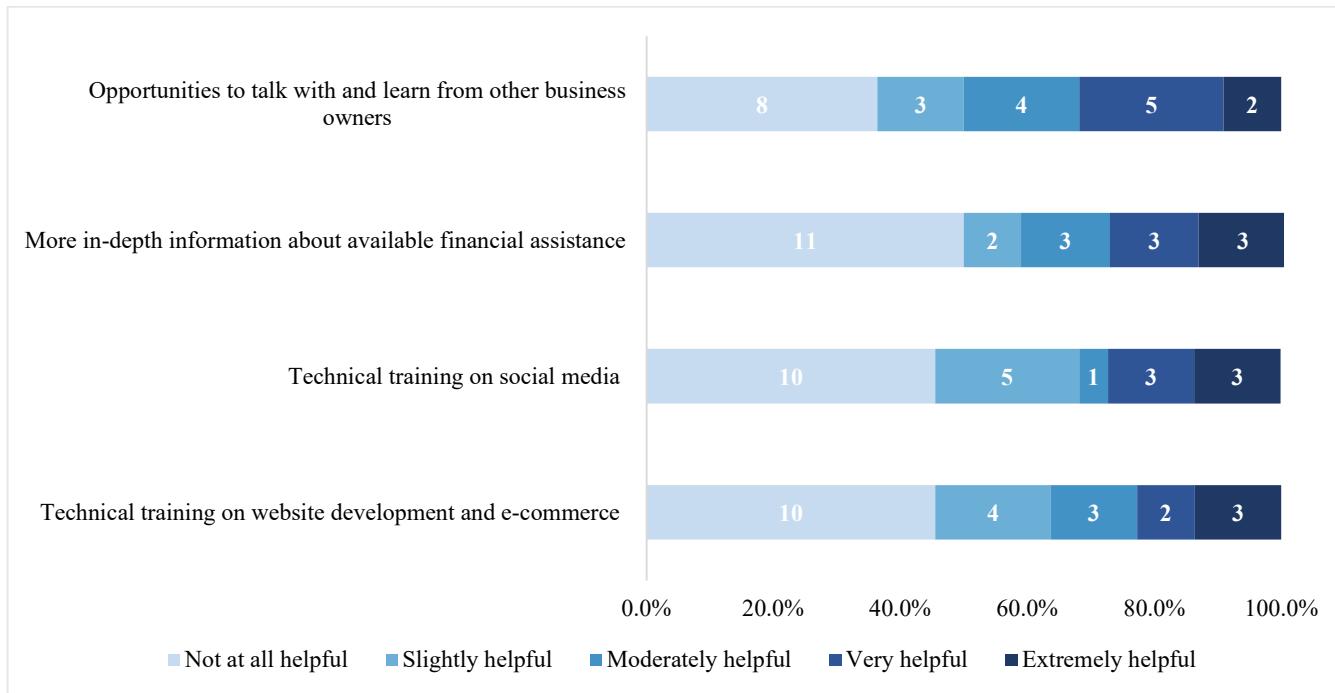
- When asked how COVID-19 has affected their business or organization, respondents most frequently reported cancelled events (n = 19), mitigate public safety (e.g., cleaning supplies, gloves, masks, etc.) (n = 17) and lost revenue (n = 12).



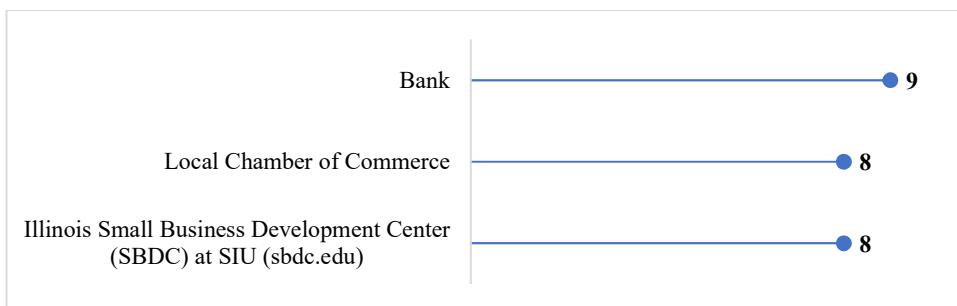
- Participants reported the extent to which they were concerned about several outcomes due to COVID-19 on a 1 (*Not at all concerned*) to 5 (*Extremely concerned*) rating scale. The top three responses with the highest average concern rating were: protecting employees' health and safety ( $M = 3.25$ ; n = 24), losing business ( $M = 2.96$ ; n = 25), and losing customer traffic ( $M = 2.71$ ; n = 24)



- Respondents reported the extent to which several forms of assistance would be helpful to them or their business using a 1 (*Not at all helpful*) to 5 (*Extremely helpful*) rating scale. The top three responses with the highest average helpfulness rating were: opportunities to talk with and learn from other business owners ( $M = 2.55$ ;  $n = 22$ ), more in-depth information about available financial assistance ( $M = 2.32$ ;  $n = 22$ ), technical training on social media ( $M = 2.27$ ;  $n = 22$ ), and technical training on website development and e-commerce ( $M = 2.27$ ;  $n = 22$ ).

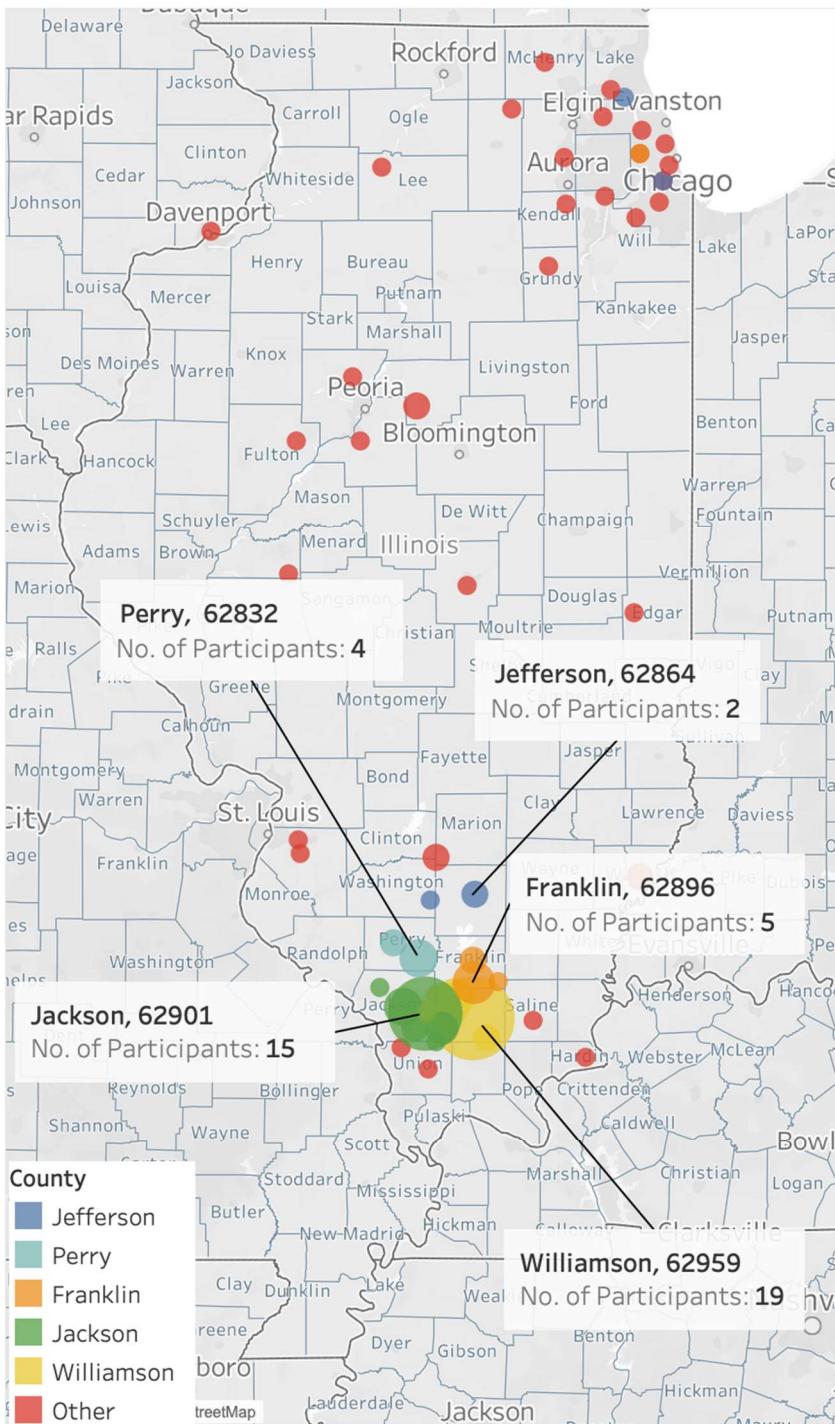


- Respondents were asked which local resources they have accessed for assistance during this time. The top three responses are reported below.

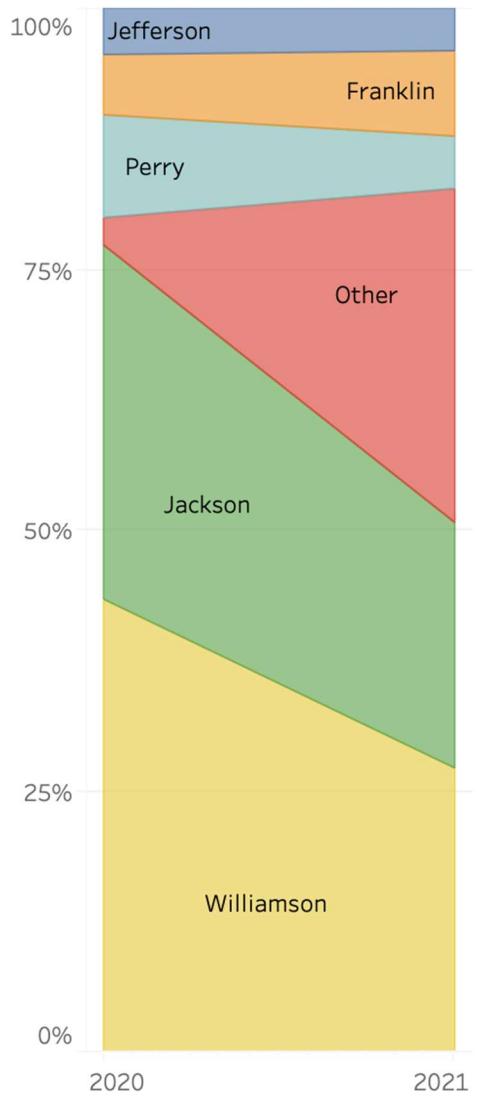


# ZIP CODES BY COUNTY

Zipcode (Feb. 2021)



County



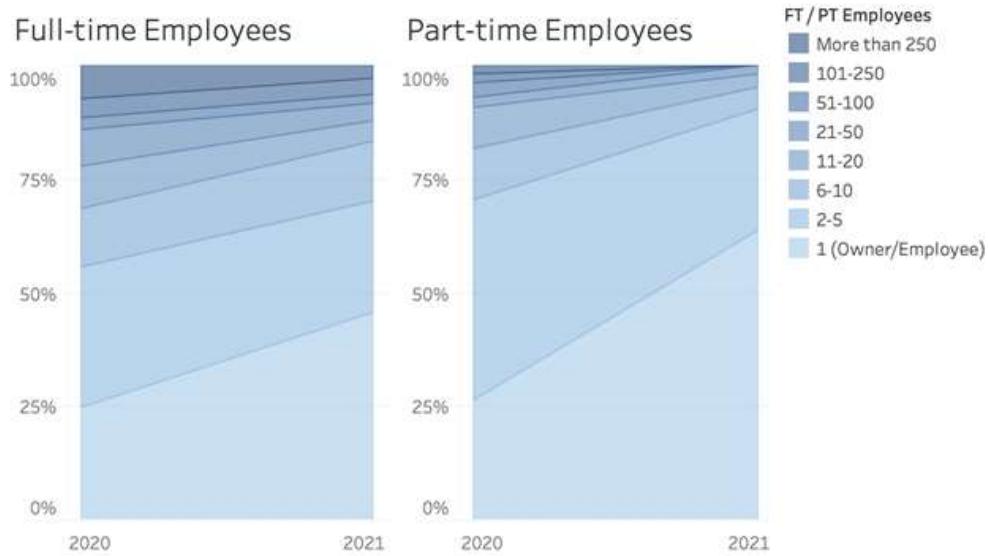
# Comparison of Time Points

As a follow-up to the previous survey which was distributed in April/May 2020, changes over time can be reported (though there was no way of associating specific responses from April/May to the February responses). A small majority of respondents in February had not taken the survey in April/May (53.9%), while 46.1% had taken the survey (n = 115).

## Employees

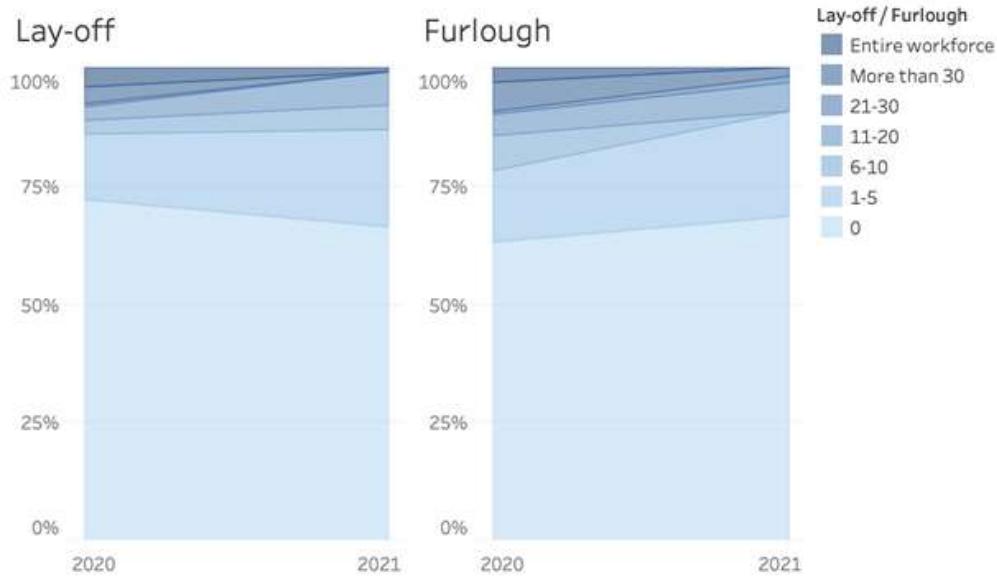
The number of respondents reporting that they were the only full-time employee increased from 24.6% to 40.2% (a 15.6%-point increase). The number of respondents reporting having between two and five full-time employees decreased from 31.2% to 24.2% (a 7.0%-point decrease). The number of respondents reporting having between six and ten full-time employees decreased from 12.6% to 12.1% (a 0.5%-point decrease). The number of respondents reporting having between 11 and 20 full-time employees decreased from 9.5% to 4.7% (a 4.8%-point decrease). The number of respondents reporting having between 21 and 50 full-time employees decreased from 8.0% to 3.7% (a 4.3%-point decrease). The number of respondents reporting having between 51 and 100 full-time employees increased from 2.5% to 2.8% (a 0.3%-point increase). The number of respondents reporting having between 101 and 250 full-time employees decreased from 4.0% to 3.7% (a 0.3%-point decrease). The number of respondents reporting having over 250 full-time employees decreased from 7.5% to 3.7% (a 3.8%-point decrease).

The number of respondents reporting that they did not have any part-time employees increased from 26.4% to 62.7% (a 36.3%-point increase). The number of respondents reporting having between two and five part-time employees decreased from 44.0% to 25.5% (a 18.5%-point decrease). The number of respondents reporting having between six and ten part-time employees decreased from 11.3% to 4.9% (a 6.4%-point decrease). The number of respondents reporting having between 11 and 20 part-time employees decreased from 8.8% to 3.9% (a 4.9%-point decrease). The number of respondents reporting having between 21 and 50 part-time employees decreased from 8.0% to 0.2% (a 4.3%-point decrease). The number of respondents reporting having between 51 and 100 part-time employees decreased from 3.1% to 0% (a 3.1%-point decrease). The number of respondents reporting having between 101 and 250 part-time employees decreased from 1.9% to 0% (a 1.9%-point decrease). The number of respondents reporting having over 250 part-time employees decreased from 1.9% to 0% (a 1.9%-point decrease).



The number of respondents reporting that they did not have to lay any employees off due the pandemic decreased from 72.0% to 65.0% (a 7.0%-point decrease). The number of respondents reporting having laid off between one and five employees increased from 14.0% to 19.0% (a 5.0%-point increase). The number of respondents reporting having laid off between six and ten employees increased from 2.6% to 5.0% (a 2.4%-point increase). The number of respondents reporting having laid off between 11 and 20 employees increased from 3.1% to 7.0% (a 3.9%-point increase). The number of respondents reporting having laid off between 21 and 30 employees decreased from 0.5% to 0% (a 0.5%-point decrease). The number of respondents reporting having laid off their entire workforce decreased from 4.1% to 2.0% (a 2.1%-point decrease).

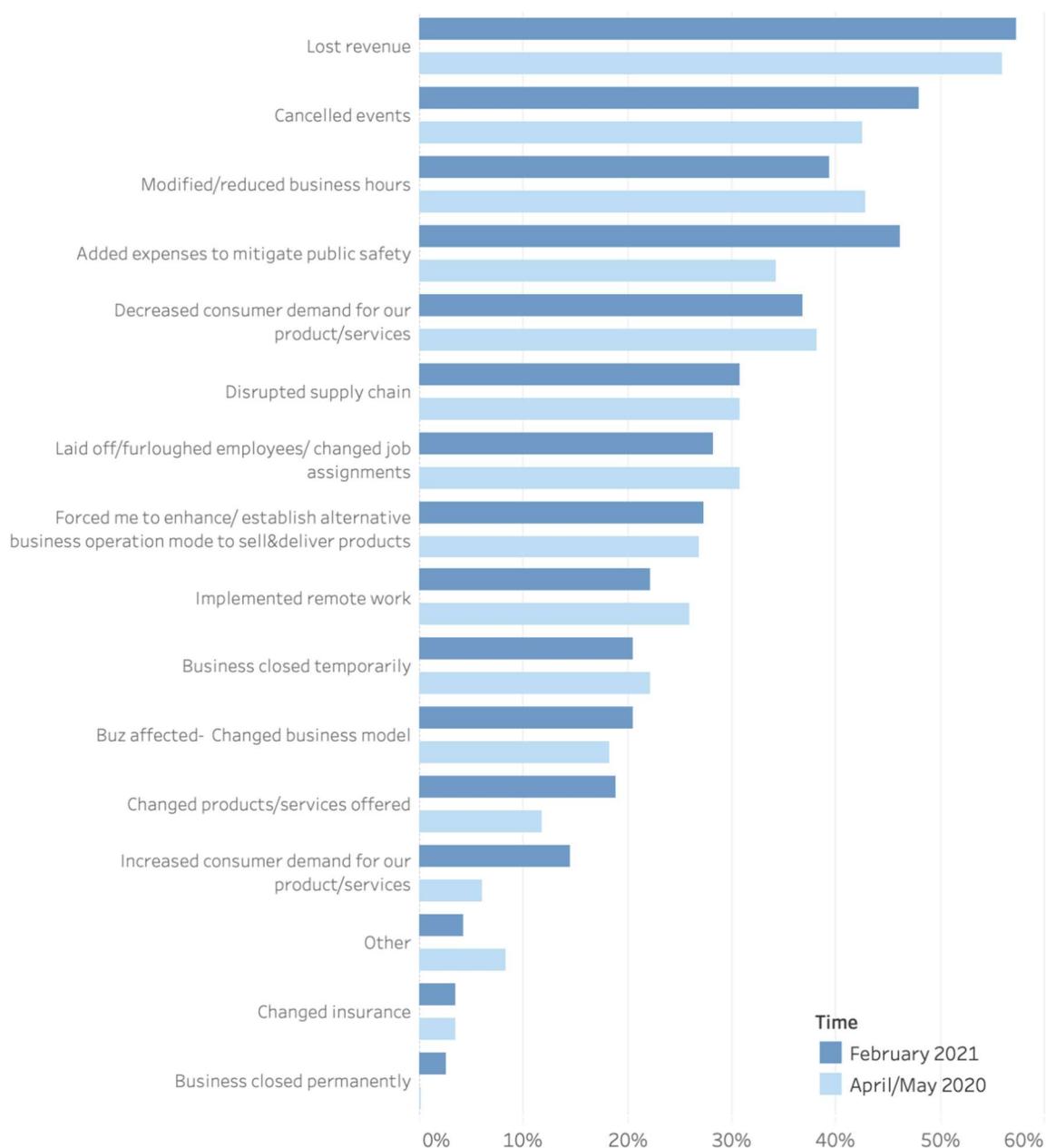
The number of respondents reporting that they did not have to furlough any employees due the pandemic increased from 62.7% to 67.7% (a 5.0%-point increase). The number of respondents reporting having furloughed between one and five employees increased from 15.0% to 23.2% (a 7.0%-point increase). The number of respondents reporting having furloughed between six and ten employees decreased from 7.3% to 2.0% (a 5.3%-point decrease). The number of respondents reporting having furloughed between 11 and 20 employees decreased from 4.7% to 4.0% (a 0.7%-point decrease). The number of respondents reporting having furloughed between 21 and 30 employees increased from 0.5% to 1.0% (a 0.5%-point increase). The number of respondents reporting having furloughed more than 30 employees decreased from 6.2% to 2.0% (a 4.2%-point increase).



## Revenue

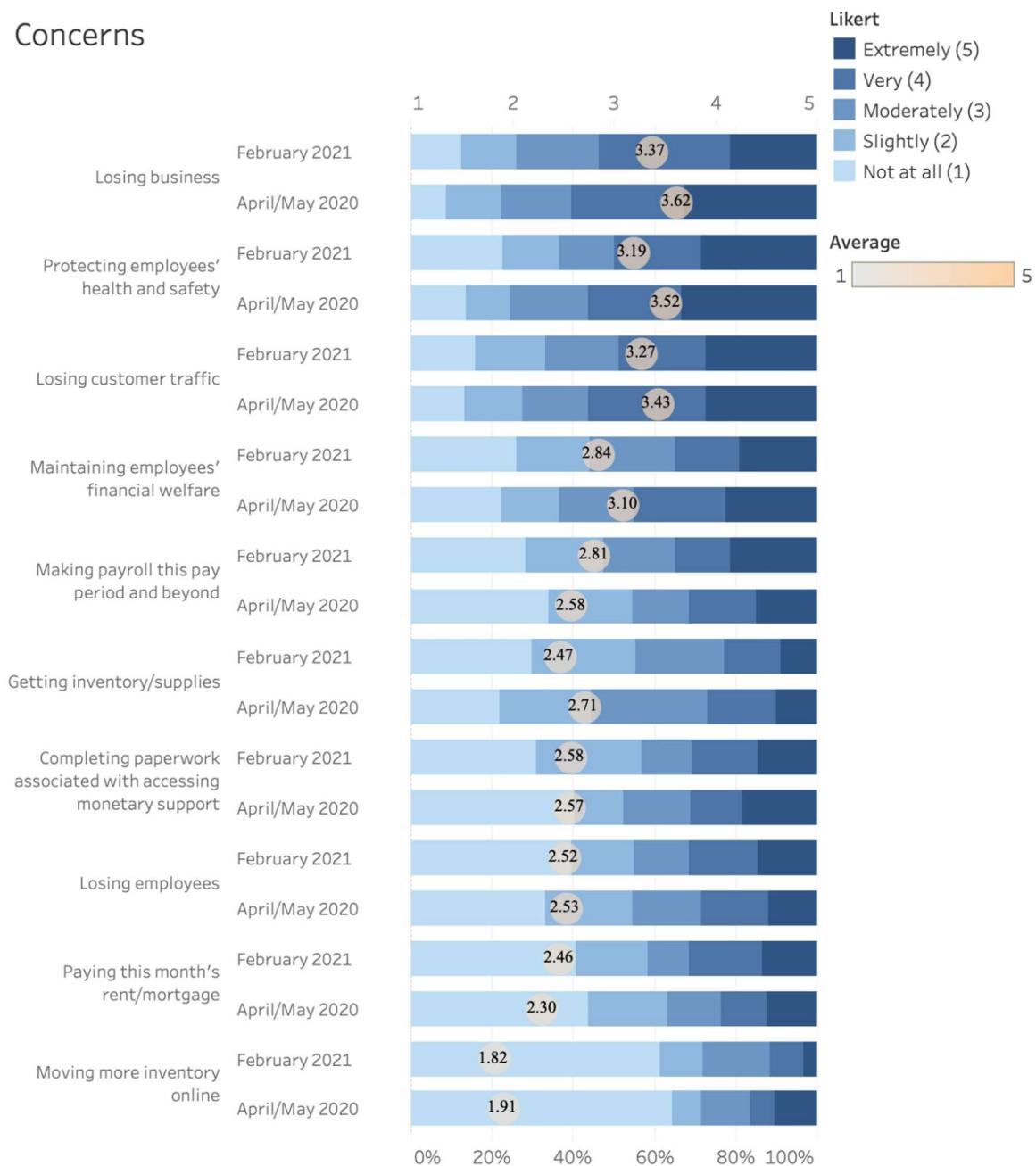
- When asked how COVID-19 has affected their business or organization, respondents from April/May tended to report similar impacts to respondents from February. However, there were several areas which differed between the time points.
- Several prominent differences are listed here:
  - The number of respondents reporting added expenses to mitigate risks to public safety increased from 33.2% to 45.3% (a 12.1%-point increase).
  - The number of respondents reporting increased demand for their products/services increased from 6.2% to 14.5% (an 8.3%-point increase).
  - The number of respondents reporting the cancellation of events increased from 41.1% to 47.9% (a 6.8%-point increase).
  - The number of respondents reporting changing the products/services they offered increased from 12.2% to 18.8% (a 6.6%-point increase).
  - The number of respondents reporting modified/reduced business hours decreased from 41.5% to 38.5% (a 3.0%-point decrease).

## Business Affected



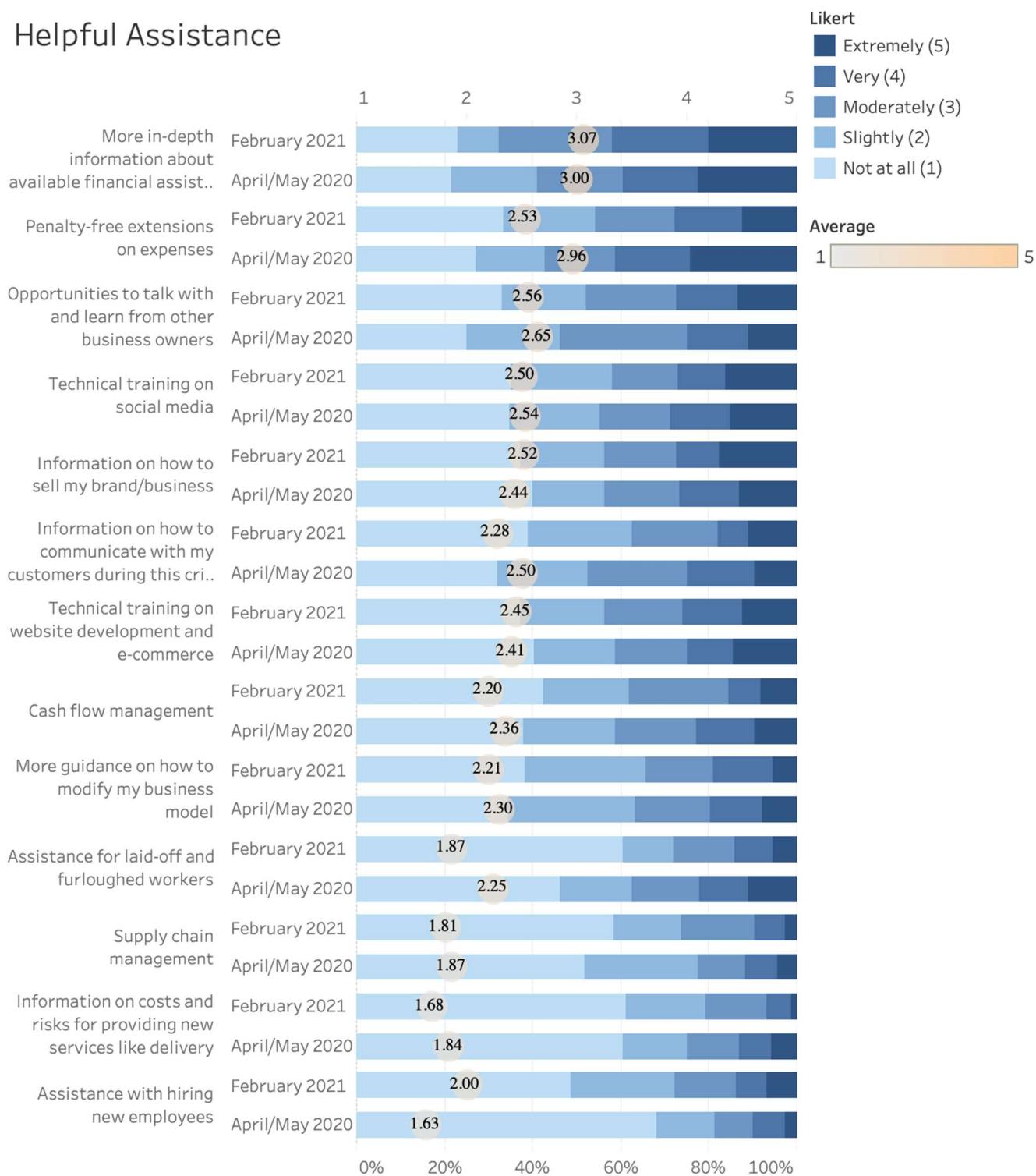
- When asked how much they are concerned with several factors pertaining to their business or organization, respondents from April/May tended to report similar concerns to respondents from February. However, there were several areas which differed between the time points.
- Several prominent differences are listed here:
  - Respondents reported less concern about protecting employees' health and safety in February ( $M = 3.19$ ) than did respondents in April/May ( $M = 3.52$ ).
  - Respondents reported less concern about losing business in February ( $M = 3.37$ ) than did respondents in April/May ( $M = 3.62$ ).
  - Respondents reported less concern about maintaining employees' financial welfare in February ( $M = 2.84$ ) than did respondents in April/May ( $M = 3.10$ ).
  - Respondents reported less concern about getting inventory and supplies in February ( $M = 2.47$ ) than did respondents in April/May ( $M = 2.71$ ).
  - Respondents reported more concern about making payroll in this pay period and beyond in February ( $M = 2.81$ ) than did respondents in April/May ( $M = 2.58$ ).

## Concerns



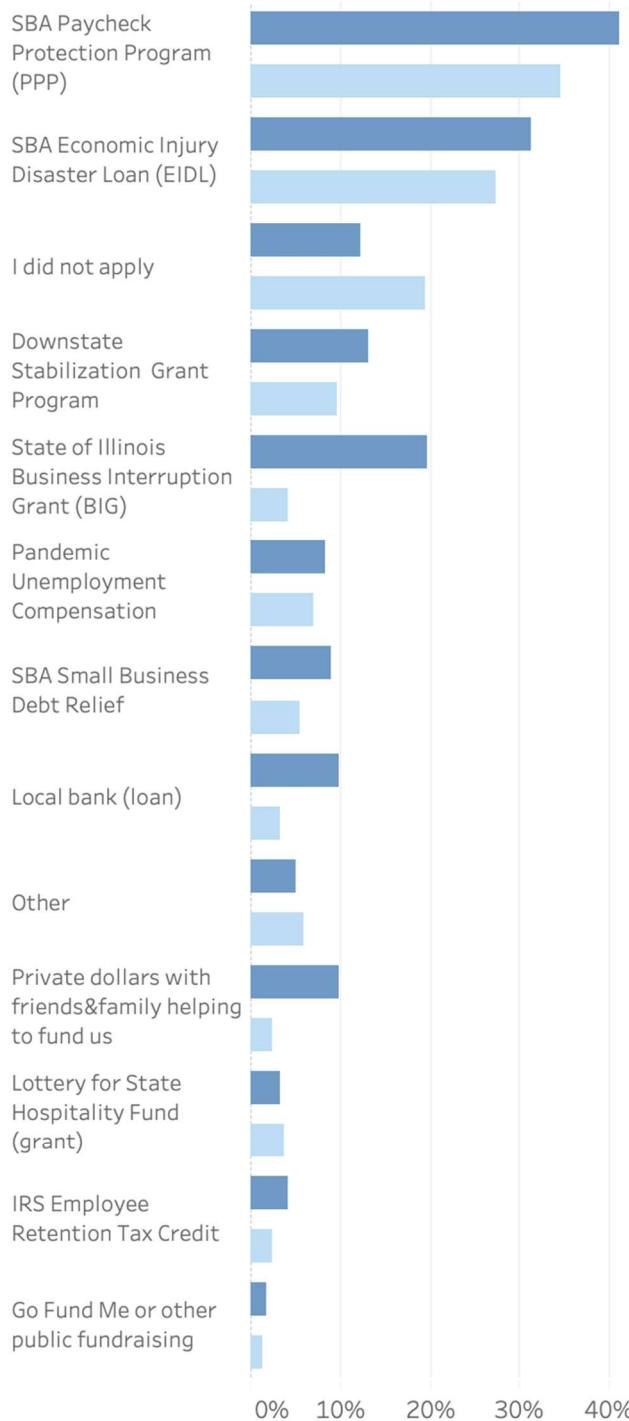
- When asked how much several forms of assistance could help their business or organization, respondents from April/May tended to report similar views to respondents from February. However, there were several areas which differed between the time points.
- Several prominent differences are listed here:
  - Respondents rated penalty-free extensions on expenses as less helpful in February ( $M = 2.53$ ) than did respondents in April/May ( $M = 2.96$ ).
  - Respondents rated information on how to communicate with customers as less helpful in February ( $M = 2.28$ ) than did respondents in April/May ( $M = 2.50$ ).
  - Respondents rated cash-flow management as less helpful in February ( $M = 2.20$ ) than did respondents in April/May ( $M = 2.36$ ).
  - Respondents rated assistance for laid-off/furloughed workers as less helpful in February ( $M = 1.87$ ) than did respondents in April/May ( $M = 2.25$ ).
  - Respondents rated information on costs and risks for providing new services like delivery as less helpful in February ( $M = 1.68$ ) than did respondents in April/May ( $M = 1.84$ ).
  - Respondents rated assistance with hiring new employees as more helpful in February ( $M = 2.00$ ) than did respondents in April/May ( $M = 1.63$ ).

## Helpful Assistance

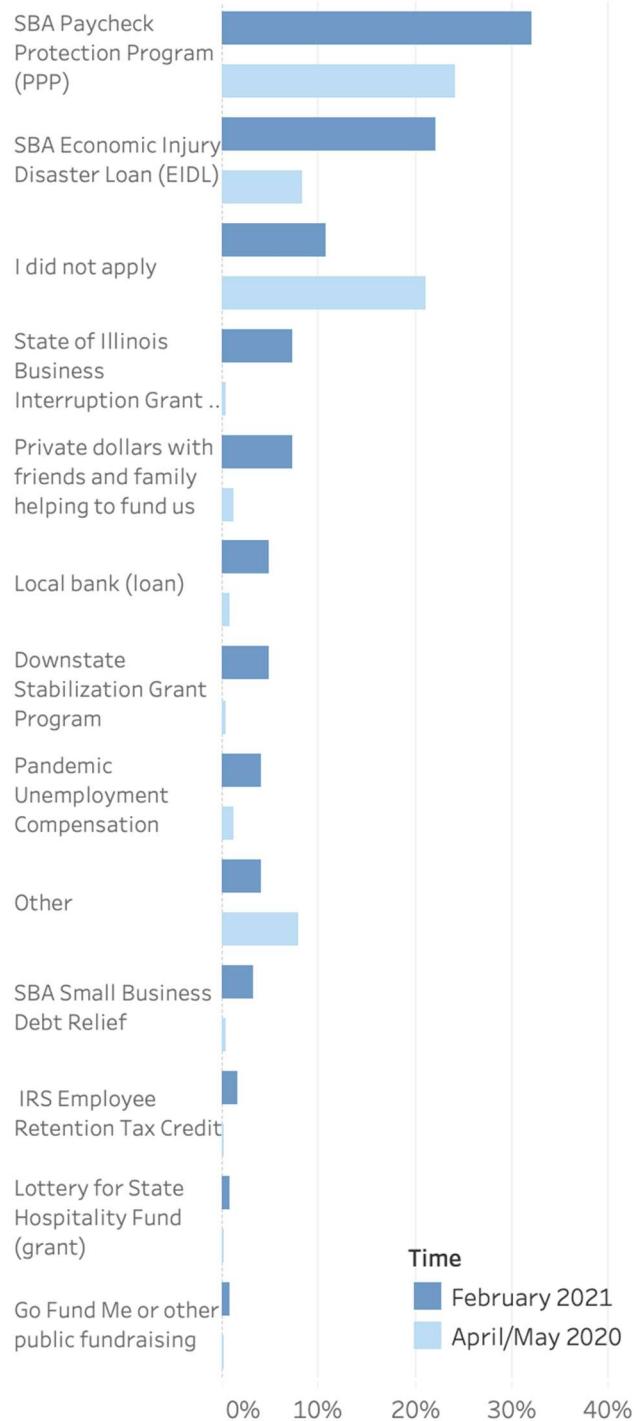


- When asked which, if any, financial resources they had applied for, respondents from April/May tended to report applying for similar levels of financial assistance to respondents from February. However, there were several areas which differed between the time points.
- Several prominent differences are listed here:
  - The number of respondents who applied for the SBA Paycheck Protection Program (PPP) increased from 35.3% to 40.6% (a 5.5%-point increase).
  - The number of respondents who applied for the State of Illinois Business Interruption Grant (BIG) increased from 4.7% to 19.8% (a 15.1%-point increase).
  - The number of respondents who applied for local bank loans increased from 3.7% to 10.0% (a 6.3%-point increase).
  - The number of respondents who sought private dollars with family/friends helping increased from 2.6% to 9.9% (a 7.3%-point increase).
  - The number of respondents who said they had not applied decreased from 19.7% to 11.5% (an 8.2%-point decrease).
  
- When asked which, if any, financial resources they had received, respondents from April/May tended to report receiving similar levels of financial assistance to respondents from February. However, there were several areas which differed between the time points.
- Several prominent differences are listed here:
  - The number of respondents who received money from the SBA Paycheck Protection Program (PPP) increased from 23.4% to 32.2% (an 8.8%-point increase).
  - The number of respondents who received money from the SBA Economic Injury Disaster Loan (EIDL) increased from 8.3% to 21.4% (a 13.1%-point increase).
  - The number of respondents who applied for the State of Illinois Business Interruption Grant (BIG) increased from 0.2% to 8.1% (a 7.9%-point increase).
  - The number of respondents who applied for local bank loans increased from 0.4% to 6.1% (a 5.7%-point increase).
  - The number of respondents who sought private dollars with family/friends helping increased from 0.8% to 8.0% (a 7.2%-point increase).

## Gap Finance Applied/ Applying

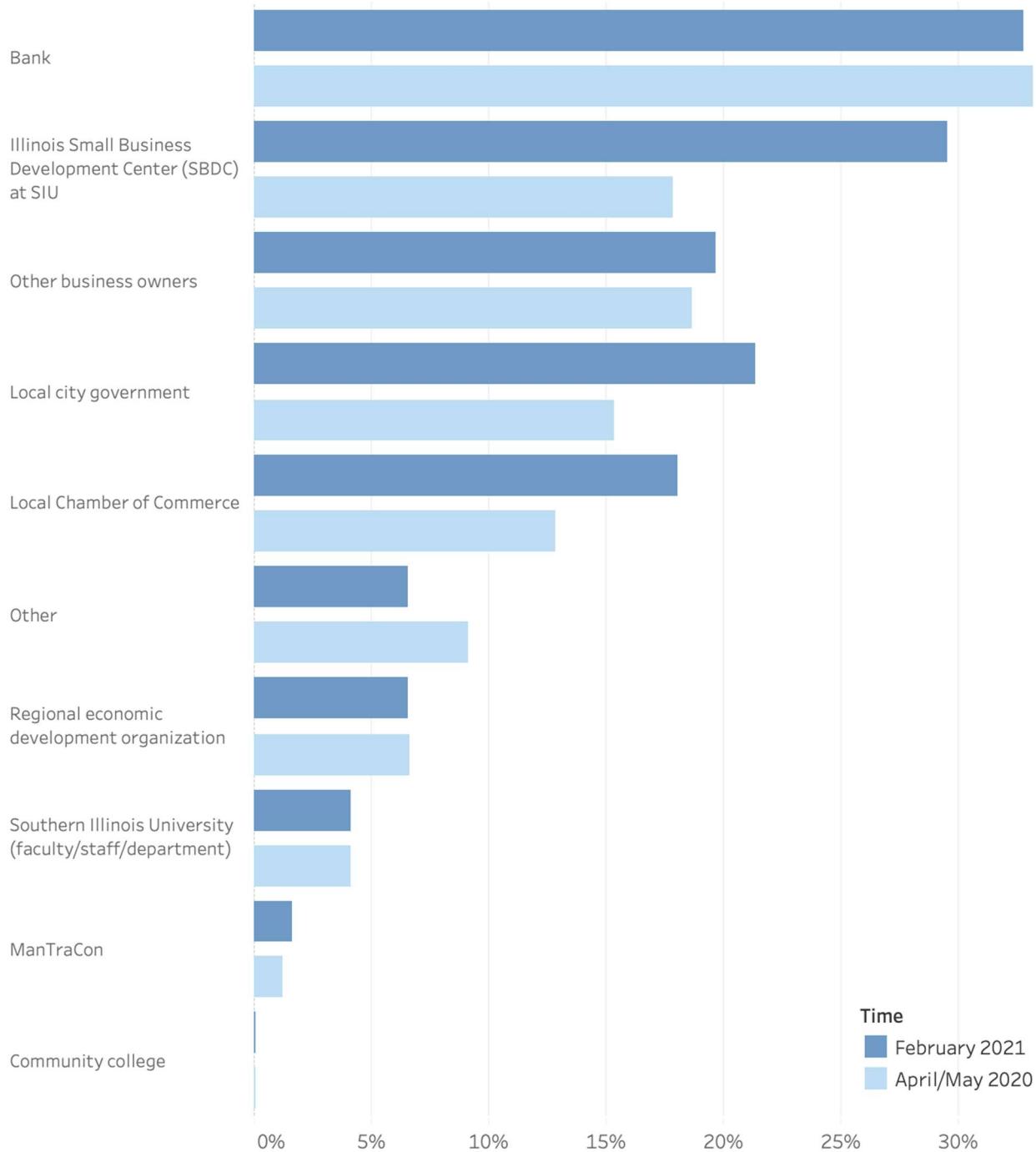


## Gap Finance Received



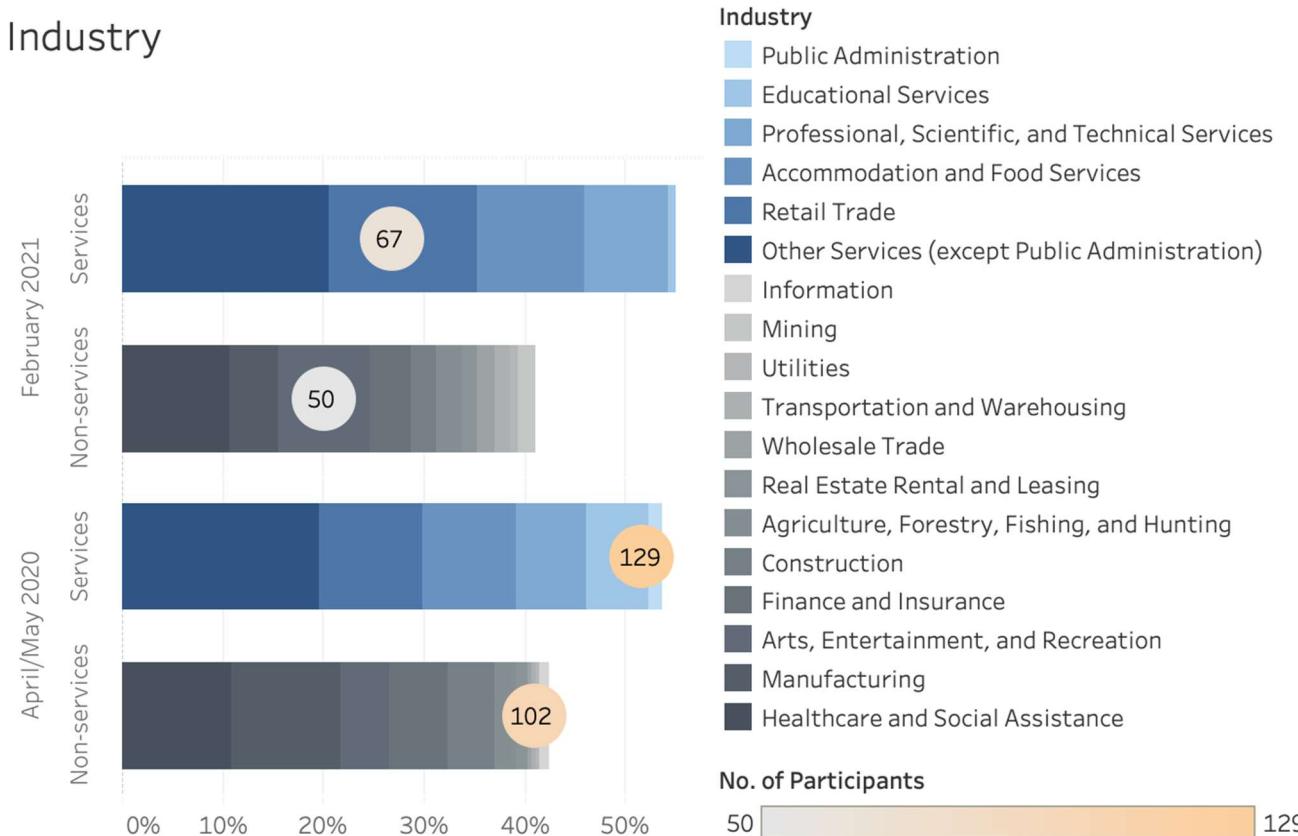
- When asked which, if any, local resources they had accessed, respondents from April/May tended to report accessing local resources at similar levels as respondents from February. However, there were several areas which differed between the time points.
- Several prominent differences are listed here:
  - The number of respondents who accessed the Small Business Development Center (SBDC) increased from 15.9% to 29.3% (a 13.4%-point increase).
  - The number of respondents who accessed their local city government increased from 15.5% to 21.4% (a 5.9%-point increase).
  - The number of respondents who accessed their local chamber of commerce increased from 12.8% to 18.0% (a 5.2%-point increase).
  - The number of respondents who accessed other local resources decreased from 9.2% to 6.5% (a 3.7%-point decrease).

## Local Resources Accessed



# Service versus Non-Service Industry Businesses

In addition, it may be of use to examine how businesses in different industries are faring during the pandemic in order to determine how best to aid a given business. Respondents were group according to whether their business was in the service industry or a non-service industry, as many services were highly impacted by the pandemic. The overall ratio of service and non-service respondents stayed similar across both April/May (55.8% service and 44.2% non-service) and February (57.3% service and 42.7% non-service).

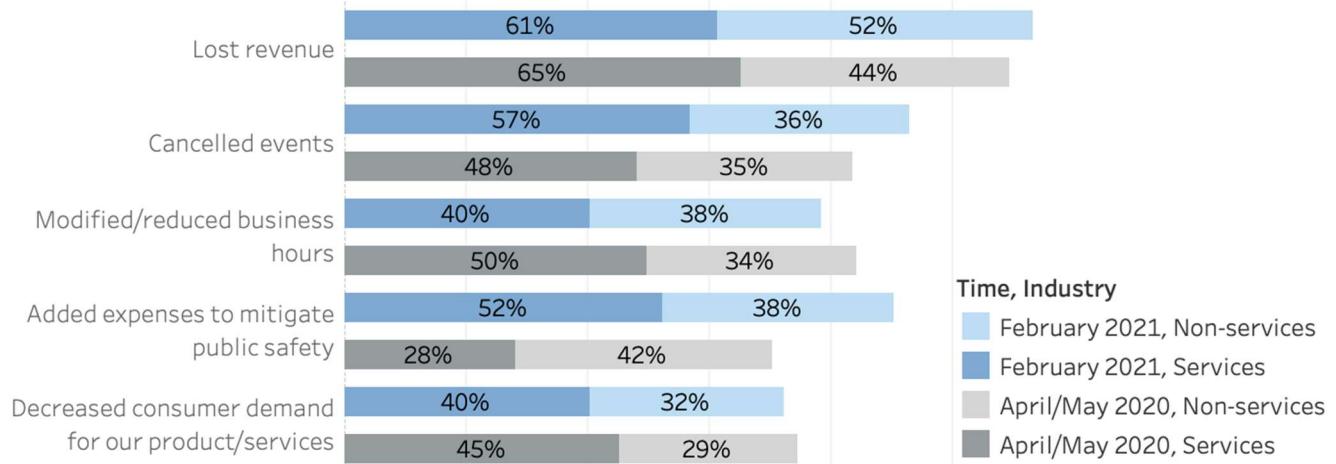


**\*Note:** These data are also broken down by time point, as it is important to clarify that some respondents took the survey at both time points, meaning that it is not advisable to simply combine them into an overall group.

## Revenue

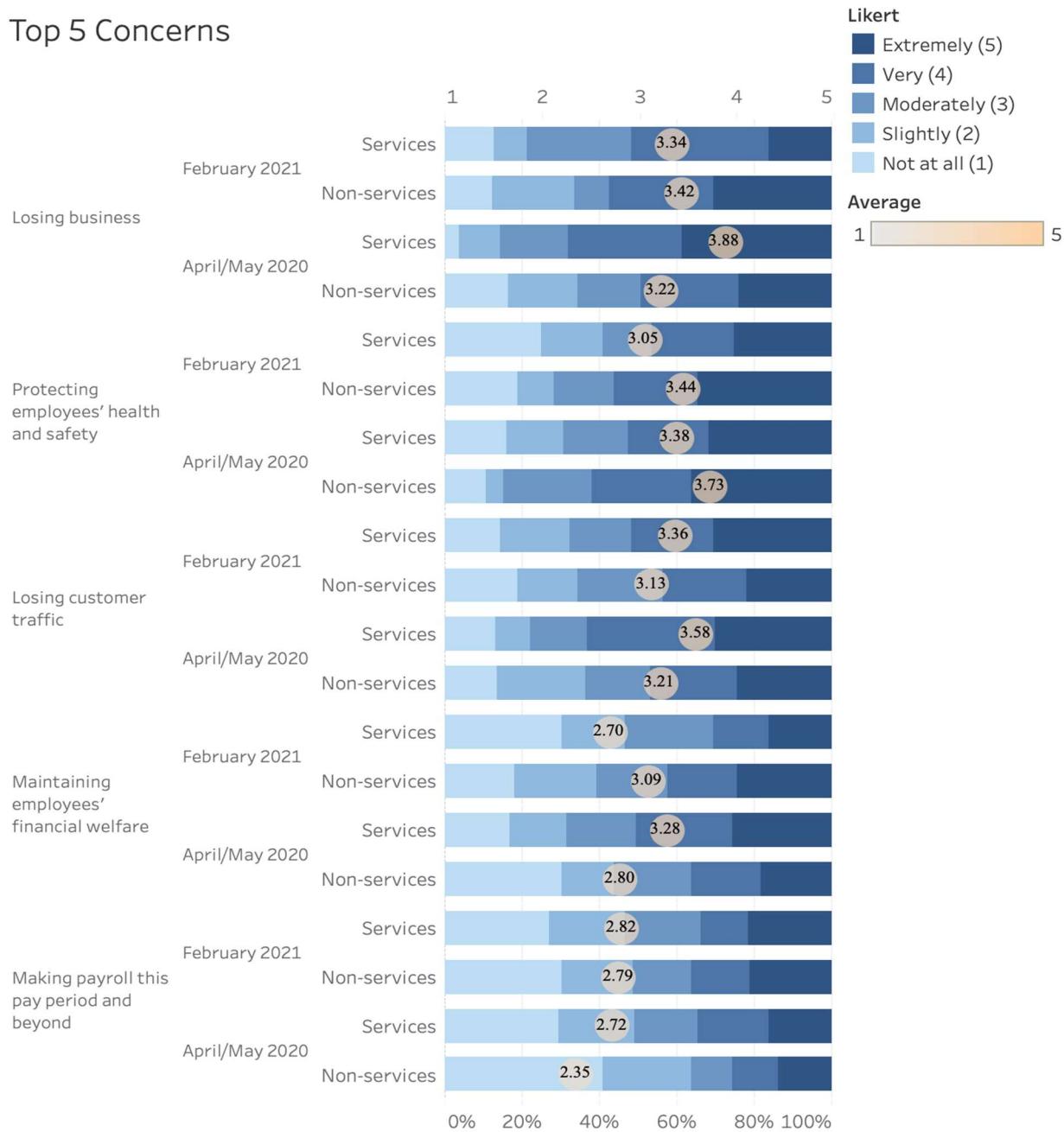
- When asked how COVID-19 has affected their business or organization, respondents from both service and non-service industries tended to report similar impacts. However, there were several areas which differed between the industries.
- Several prominent differences are listed here:
  - The number of service industry respondents in February reporting that cancelled events have impacted their business was greater (57.0%), compared to service industry respondents in April/May (48.0%). Additionally, service industry respondents reported more impact from the cancellation of events (52.5%) than did non-service industry respondents (35.5%) across both time points.
  - The number of service industry respondents in February reporting that they have been impacted by added expenses which mitigate risks to public safety was greater (52.0%), compared to service industry respondents in April/May (28.0%). Additionally, service industry respondents reported similar impact from these added expenses (40.0%) as non-service industry respondents (40.0%) across both time points, though service industry respondents in April/May reported the least impact from these expenses.
  - For all types of impact, except for added expenses to mitigate safety concerns, service industry respondents reported having been affected more severely than those in non-service industries.

### Top 5 Business Affected



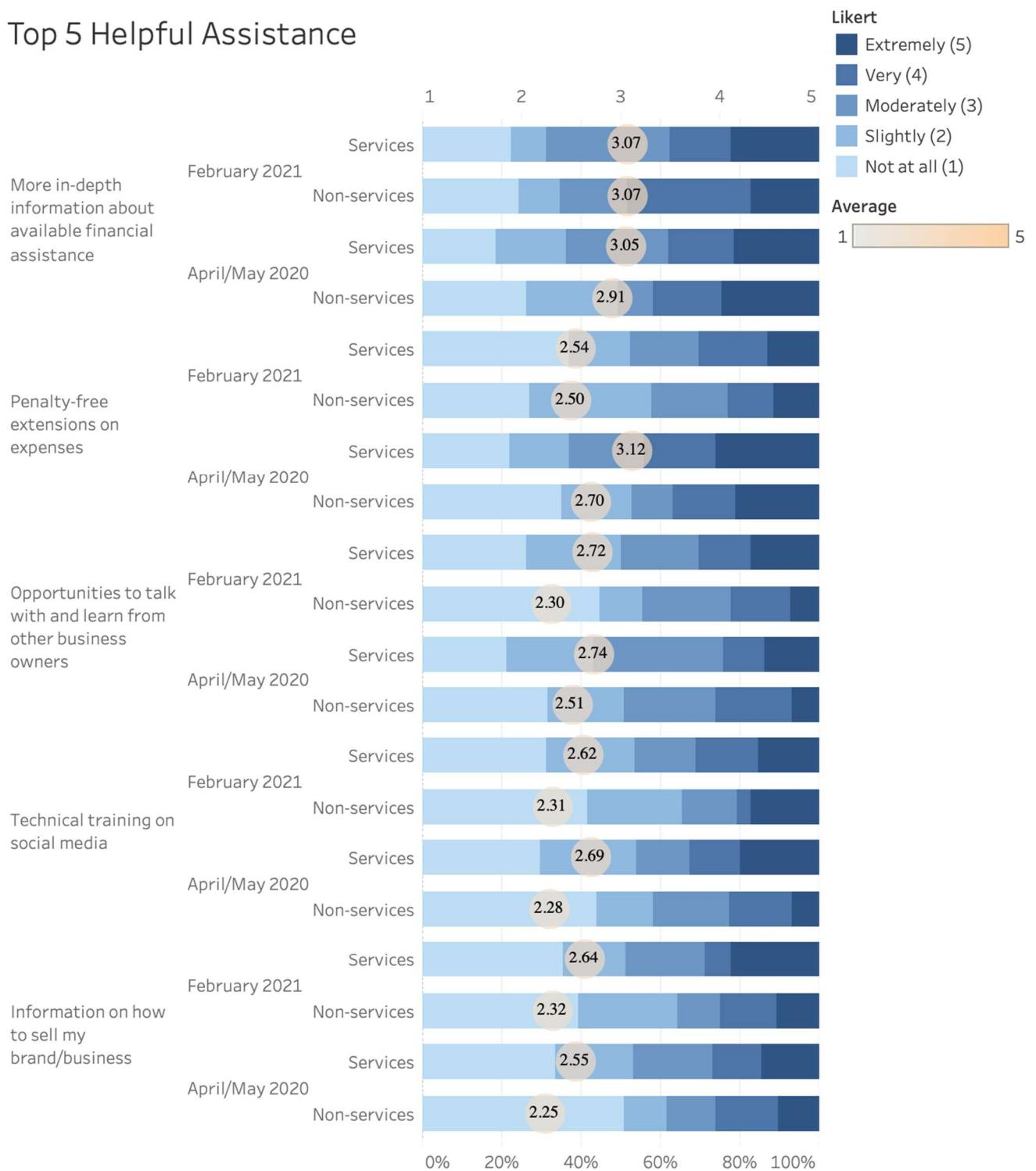
- When asked how much they are concerned with several factors pertaining to their business or organization, service industry respondents tended to report similar concerns to respondents from non-service industries. However, there were several areas which differed between the industries.
- Several prominent findings are listed here:
  - Service industry respondents in April/May were more concerned about losing business ( $M = 3.88$ ) than non-service respondents ( $M = 3.32$ ) and service respondents in February ( $M = 3.34$ ).
  - Service industry respondents in February were less concerned about protecting employees' health and safety than ( $M = 3.05$ ) than non-service respondents in February ( $M = 3.44$ ) and service respondents in April/May ( $M = 3.38$ ). Additionally, non-service industry respondents in April/May were the most concerned about protecting employees' health and safety ( $M = 3.73$ ).
  - Non-service industry respondents in April/May were less concerned about losing business ( $M = 2.35$ ) than non-service respondents in February ( $M = 2.79$ ) and service respondents ( $M = 2.77$ ).

## Top 5 Concerns



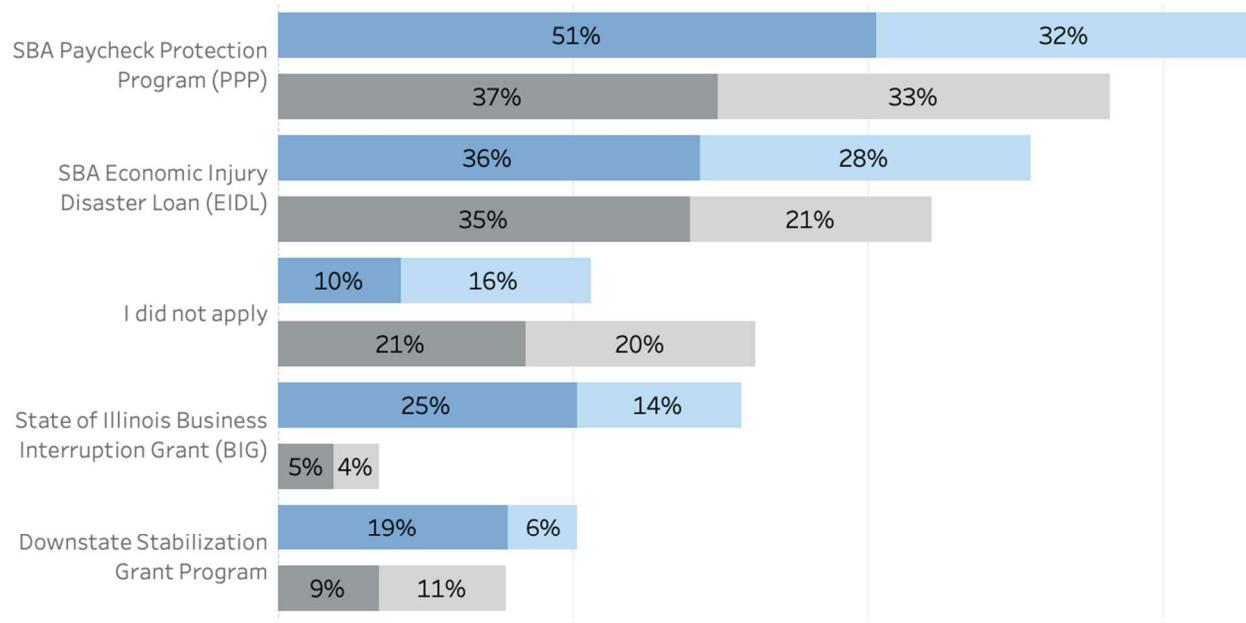
- When asked how much several forms of assistance could help their business or organization, respondents from the service industry tended to report similar views to respondents from non-service industries. However, there were several areas which differed between the industries.
- Several prominent differences are listed here:
  - Service industry respondents from April/May rated penalty-free extensions on expenses ( $M = 3.12$ ) as more helpful than service industry respondents in February ( $M = 2.54$ ), and non-service respondents ( $M = 2.60$ ).
  - Service industry respondents from both time points rated technical training on social media ( $M = 2.66$ ) as more helpful than did non-service respondents from both time points ( $M = 2.30$ ).
  - For both industry types and at both time points, in-depth information about financial assistance was consistently rated as helpful by respondents (means range from 2.91-3.07).

## Top 5 Helpful Assistance

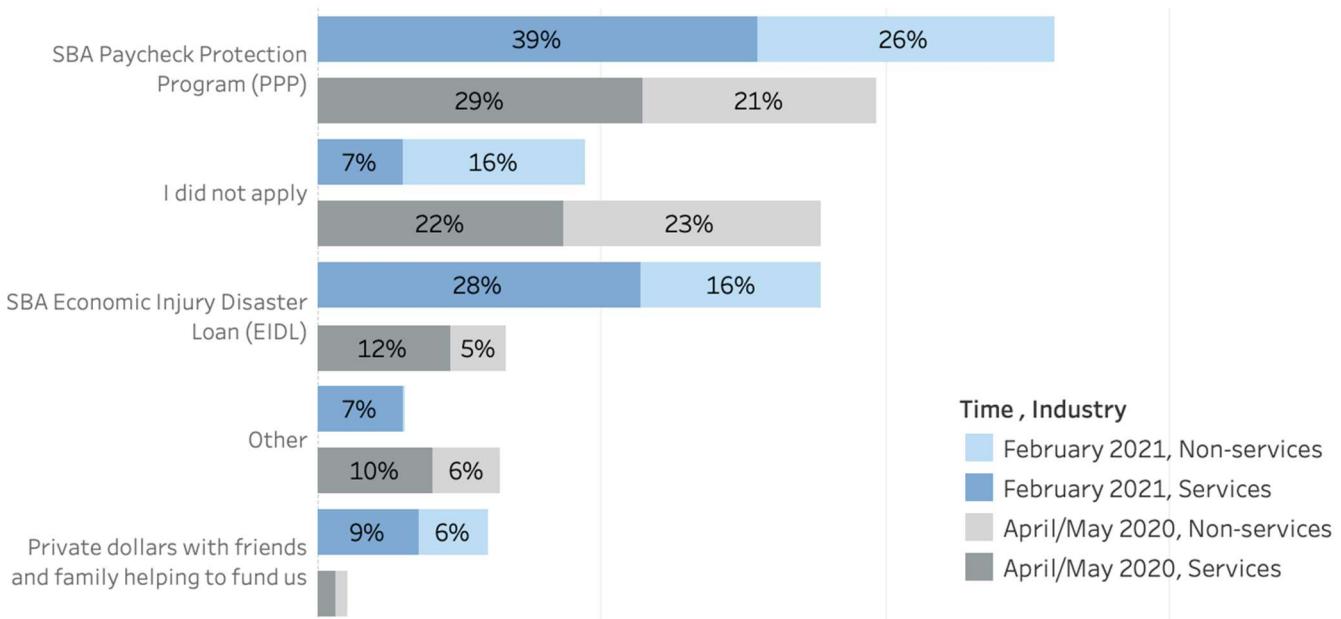


- When asked which, if any, financial resources they had applied for, respondents from service industries tended to report somewhat higher levels of applying for financial assistance than respondents from non-service industries. However, there were several areas which differed between the time points.
- Several prominent differences are listed here:
  - 51% of service industry respondents had applied for PPP funding by February, compared to 32% of non-service industry respondents, while this difference was not present in April/May.
  - 19% of service industry respondents had applied for Downstate Stabilization Grant Program funding by February, compared to 6% of non-service industry respondents, while this difference was not present in April/May.
  - 25% of service industry respondents had applied for BIG funding by February, compared to 14% of non-service industry respondents, while this difference was not present in April/May.
  - While the number of respondents who said they had not applied was similar across industries for April/May, by February only 10% of service industry respondents had not applied, while 16% of non-service industry respondents had not applied.
  
- When asked which, if any, financial resources they had received, respondents from service industries tended to report somewhat higher levels of receiving financial assistance than respondents from non-service industries. There were several areas which differed between the industries.
- Several prominent findings are listed here:
  - 39% of service industry respondents had received PPP funding by February, compared to 26% of non-service industry respondents.
  - 28% of service industry respondents had received EIDL funding by February, compared to 16% of non-service industry respondents.
  - 9% of service industry respondents had received private dollars from friends/family by February, compared to 6% of non-service industry respondents.
  - There did not appear to be much change what percentage of service industry respondents received relative to non-service respondents between April/May and February.

## Top 5 Gap Finance Applied/ Applying

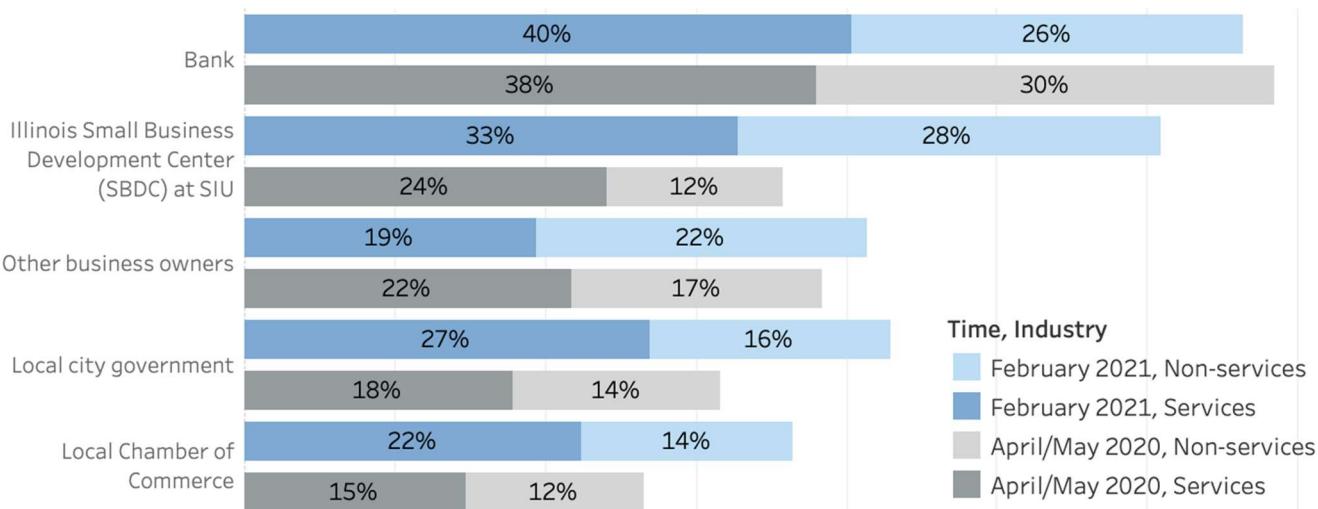


## Top 5 Gap Finance Received



- When asked which, if any, local resources they had accessed, respondents from service industries tended to report accessing local resources at similar levels as respondents from non-service industries. However, there were several areas which differed between the industries.
- Several prominent differences are listed here:
  - While only 12% of non-service industry respondents had accessed the SBDC in April/May, 28% of non-service industry respondents had accessed the SBDC by February.
  - The number of respondents who accessed local resources of any kind somewhat increased between April/May and February, across both industries (with the exception of utilizing banks).
  - Overall, service industry respondents reported somewhat higher utilization of local resources than did non-service respondents, across both time points.

## Top 5 Local Resources Accessed

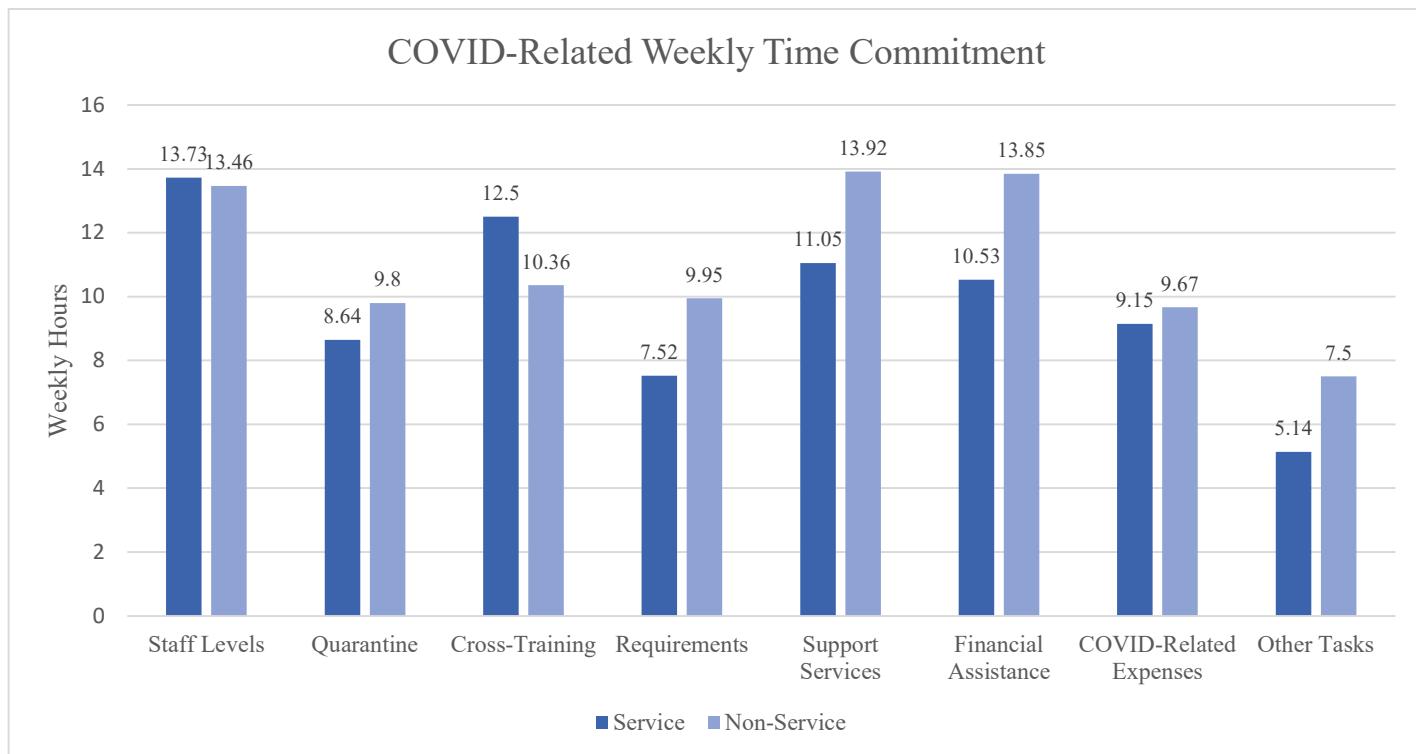


# Industry Breakdown: Weekly Time Expenditure Associated with COVID-19

Precautionary and administrative tasks associated with COVID-19 demand financial and time investments from businesses (e.g. seeking financial assistance, staff quarantining, setting up an online sales component, etc.). While not asked on the April/May version of this survey, respondents in February were asked whether they (the owner) or their employees spend time each week on seven activities related to COVID-19: ensuring proper staff levels, staff exposure/quarantine, cross-training to prepare for staff shortages, staying up-to-date on COVID-19 mitigations and requirements, accessing support services, applying for financial assistance (e.g. loans, grants, etc.), tracking COVID-related expenses, as well as any other tasks associated with COVID-19 safety/compliance.

As with the prior section, the data are broken down by industry (Service vs Non-Service). More than half (59.8%) of respondents indicated that they spend time each week on at least one of these tasks. Of the tasks included in this survey, staying up-to-date on COVID mitigations/requirements (Service: 54.5%, Non-Service: 44.9%) and applying for financial assistance (Service: 51.5%, Non-Service: 40.1%) were most commonly reported to take up some time each week, for both industries.

For business owners who reported spending time on these tasks, the mean amount of weekly hours spent on each task were calculated and presented in the table below, which breaks the results down by industry. Non-service businesses reported spending more weekly hours staying up-to-date on mitigations and requirements related to COVID-19, accessing support services, and applying for financial assistance than did service businesses, while service businesses reported spending more weekly hours cross-training to prepare for staff shortages than did non-service businesses.



# CONTACT INFORMATION

For more information, please contact the SIU Research Park staff:

**Lynn Andersen Lindberg**

Email: [lindberg@siu.edu](mailto:lindberg@siu.edu)

Phone: (618) 453-6754

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**Deb Barnett**

Email: [dbarnett@siu.edu](mailto:dbarnett@siu.edu)

Phone: (618) 453-3849

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**Greg Bouhl**

Email: [greg@siu.edu](mailto:greg@siu.edu)

Phone: (618) 536-2424