



Business Resilience Taskforce



ROCKINGHAM COUNTY | VA
ECONOMIC DEVELOPMENT



Small Businesses & Recovery: What Customers Want

We surveyed the community to find out how they feel about a variety of topics related to public health and what influences the decisions they make about the places they visit and patron.

The previous implementation of this survey was administered in advance of the lifting of restrictions on small businesses and mass gatherings in Virginia. Those results depicted customers' attitudes prior to Virginia entering Phase 1 of reopening.

This summary covers the results of a follow up to that survey, which was administered during Phase 3 of Virginia's reopening. Brief comparisons are included at the end of each question to provide context on how customers' attitudes have shifted since the previous survey.

The survey was shared by organizations and local governments in the City of Harrisonburg and Rockingham County. We received feedback from 435 survey respondents.

Key takeaways:

- Customers want businesses to make public health a priority. They want businesses to continue taking precautions that keep both employees and customers safe, and they want these precautions to be posted or shared, physically or virtually (Q1, Q11, Q12).
- There was a 21.9% increase in the number of survey respondents who said "employees wearing facemasks" impacted their level of comfort patronizing a business (Q1).
- Customers wish to touch as few common surfaces as possible (Q5, Q8, Q10).
- The number of people inside could impact customers' desire to enter or stay (Q1, Q7).
- Many respondents indicated they have already started patronizing retail businesses and restaurants that offer outdoor dining; however, people show much more uncertainty when it comes to dining indoors and engaging in recreational activities (Q2).
- Buffet-style restaurants and other self-service options will make people uncomfortable for a long time, as evidenced by both the previous and current survey results (Q2).
- The majority of respondents do not feel comfortable attending events or gatherings – indoors or outdoors – despite adherence to social distancing guidelines (Q3).

- Moving forward, roughly 60% of respondents indicated interest in business and social networking events that are held either virtually or in small outdoor gatherings (Q4).
- Over 76% of respondents said locally owned businesses capture their attention with products, services, and specials using Facebook or word of mouth. 55% indicated that google search results are influential (Q6).
- Many intend to frequently or occasionally shop online with locally owned retailers and restaurants that have e-commerce options available for pick-up or delivery (Q9).

How could businesses respond?

- Follow CDC/VDH guidelines; regularly check for new information and adapt.
- Frequently disinfect commonly touched surfaces, such as handles and card machines. Do this in front of customers.
- Post signs explaining precautions outside and inside the establishment as well as on social media pages. Ensure all employees and customers are following what is posted.
- Continue using e-commerce systems; implement e-commerce if not already in place.
- Use Facebook and Instagram to enhance your marketing – highlighting actual products, menu, items and detailed descriptions that encourage people to make a purchase. Use google adwords as part of your marketing strategy so your website can get “found” more easily.
- Explore “touchless” and low-contact systems for your business, such as: disposable paper or QR Code menus, posted chalk board menus, touchless payment, and other strategies.
- Limit the number of patrons inside establishments. If it is feasible with the type of business or establishment, consider taking reservations (using free online tools) or making appointments.
- Install automatic hand sanitizer dispensers.
- Continue offering curbside pick-up and delivery options.
- Continue offering or try implementing “senior hours” for older customers.
- Use social media and e-newsletter lists to engage customers and ask for feedback on plans. Ask customers what you can do to retain their business through this time.
- Share positive Google/Facebook/Yelp reviews that recognize your efforts to keep your staff and customers safe on social media & let your customers speak for you!

The following details share more information and specific responses to each survey question.

Q1: Which of the following factors do you feel impacts your level of comfort regarding which businesses you would patronize? (Select all that apply)

- 89.6% said employees wearing facemasks
- 87.0% said customers wearing facemasks
- 83.6% said customers and employees practicing social distancing
- 76.6% said employees frequently disinfecting surfaces, such as door handles
- 65.0% said how many customers are already inside the business
- 63.4% said plexiglass barriers where appropriate
- 57.2% said ability to order or pay online or over the phone
- 54.4% said the type of business (bank vs. yoga studio vs. restaurant)
- 53.9% said posted practices aimed at preventing the spread of the coronavirus

COMPARED TO THE PREVIOUS SURVEY
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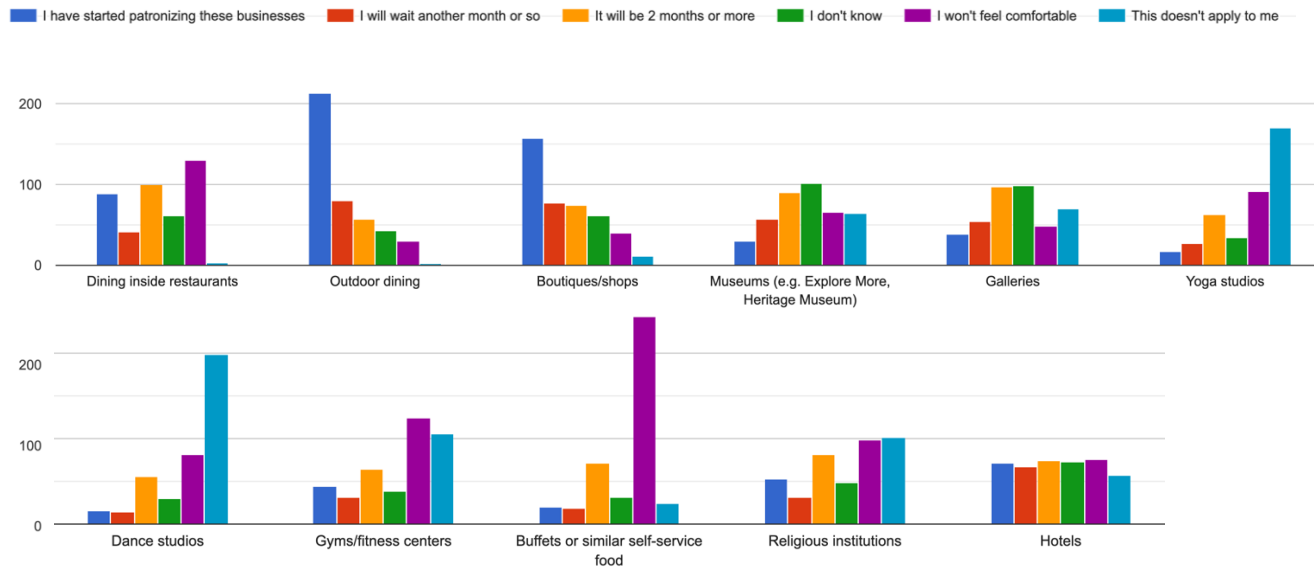
The following factors showed increased percentages compared to the survey that was administered

prior to Virginia entering Phase 1 of reopening: employees wearing facemasks, plexiglass barriers, type of business, posted practices, and physical size of the business.

The following factors were not included in the previous survey: customers wearing facemasks, customers and employees practicing social distancing, and ability to order or pay online/over phone.

The two factors that had the largest percentage change between the previous survey implementation and the most recent one, are: “employees wearing facemasks” (*increased* by 21.9%) and “employees wearing gloves” (*decreased* by 12.5%).

Q2: Now that Virginia is in Phase 3, please indicate your comfort level regarding if and when you might patronize the following type of businesses:



RESTAURANTS

Dining Inside: The majority of respondents indicated they do not feel comfortable patronizing dine-in restaurants, even now that Virginia is in Phase 3 of reopening (29.9%, 130 respondents). A number of survey respondents also indicated they will “wait two months or more” before dining in (23.2%, 101 respondents) or have already started to patronize these businesses (20.5%, 89 respondents). Still, some say they are uncertain about when they will feel comfortable (14.3%, 62 respondents) or intend to “wait another month or so” before patronizing these restaurants (9.7%, 42 respondents).

Outdoor Dining: Most respondents indicated they have already started to patronize these businesses (49.0%, 213 respondents). However, several also said they will “wait another month or so” (18.4%, 80 respondents), “wait two months or more” (13.3%, 58 respondents), are uncertain about when they will feel comfortable (9.9%, 43 respondents), or do not feel comfortable (6.9%, 30 respondents) patronizing outdoor dining establishments.

Buffet-Style: The vast majority of respondents indicated they “won’t feel comfortable” (55.9%, 243 respondents) patronizing buffet-style restaurants and self-service food stations. Only a few respondents said they “already started patronizing these businesses” (4.6%, 20 respondents).

RETAIL

Boutiques and Shops: In contrast to certain dining options, respondents seem to feel more comfortable with patronizing retail businesses, with many indicating they have already started to do so (36.3%, 158 respondents). However, more than half of respondents indicated they will “wait another month or so” (17.7%, 77 respondents), “wait two months or more” (17.0%, 74 respondents), are uncertain when they will feel comfortable (14.0%, 61 respondents), or do not feel comfortable (9.2%, 40 respondents).

RECREATION

Museums and Galleries: Many respondents said they are uncertain when they will feel comfortable visiting museums (23.4%, 102 respondents) and galleries (22.8%, 99 respondents). This was nearly tied with the number of respondents who expect to “wait two months or more” before visiting museums (20.9%, 91 respondents) and galleries (22.3%, 97 respondents).

Yoga and Dance Studios: For the majority of respondents, these types of recreation did not apply to them. However, those that do participate said that they would not feel comfortable attending yoga (21.1%, 92 respondents) and dance (18.9%, 82 respondents) classes in-person.

Gyms and Fitness Centers: About one-fourth of respondents indicated that they do not utilize these types of facilities, but for those who do, the majority said they do not feel comfortable utilizing them at this time (28.5%, 124 respondents).

Hotels: The respondents were relatively evenly split between all of the available options, with nearly an equal number indicating they do not feel comfortable at this time (17.5%, 76 respondents) or have already started to patronize these businesses (16.6%, 72 respondents).

RELIGION

Religious Institutions: Although a small proportion of respondents have already started to attend their respective religious services (12.2%, 53 respondents), more say they do not feel comfortable attending at this time (22.8%, 99 respondents). Several still claim they will “wait two months or more” (18.6%, 81 respondents), are uncertain about when they will feel comfortable (11.3%, 49 respondents), or will “wait another month or so” (7.1%, 31 respondents) to attend in-person services.

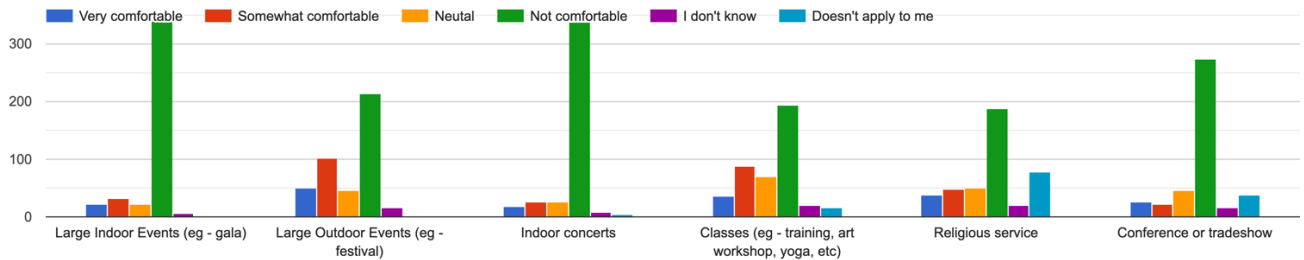
COMPARED TO THE PREVIOUS SURVEY

- **RESTAURANTS:** Previously, the majority of respondents indicated they would “wait another month or so” prior to patronizing dine-in restaurants (32.8%, 550 respondents). In the second survey, the percentage of respondents who answered this way decreased significantly (9.7%, 42 respondents). This may be partly attributed to the 6% increase (from 23.8% to 29.9%) in respondents who said they do not feel comfortable dining inside restaurants. Outdoor dining was not included separately on the previous survey, and the percentage of respondents who do not feel comfortable patronizing buffet-style restaurants remained nearly the same.
- **RETAIL:** In both surveys, respondents expressed less hesitation in patronizing retail businesses compared to restaurants. Several respondents indicated on the first survey that they would patronize retail businesses immediately following the conclusion of the stay-at-home order (32.6%, 547 respondents). This is fairly consistent with the percentage of respondents who

indicated they have already started to patronize these businesses (36.3%, 158 respondents).

- **RECREATION:** In the previous survey, respondents generally indicated they would wait longer to visit recreational establishments, such as museums, galleries, fitness centers, and hotels. In the second survey, more respondents are indicating uncertainty or discomfort.
- **RELIGION:** Recent survey results show mixed levels of comfort in attending in-person religious services. In the previous survey, 38% of those who attend religious services indicated they would be comfortable attending service in-person immediately following the conclusion of the stay-at-home order. However, this is not consistent with the number of respondents who indicated on the recent survey that they have already started to attend in-person services (12.2%, 53 respondents).

Q3: While adhering to appropriate social distancing guidelines (however they might evolve), how comfortable might you be in the coming months with the following:



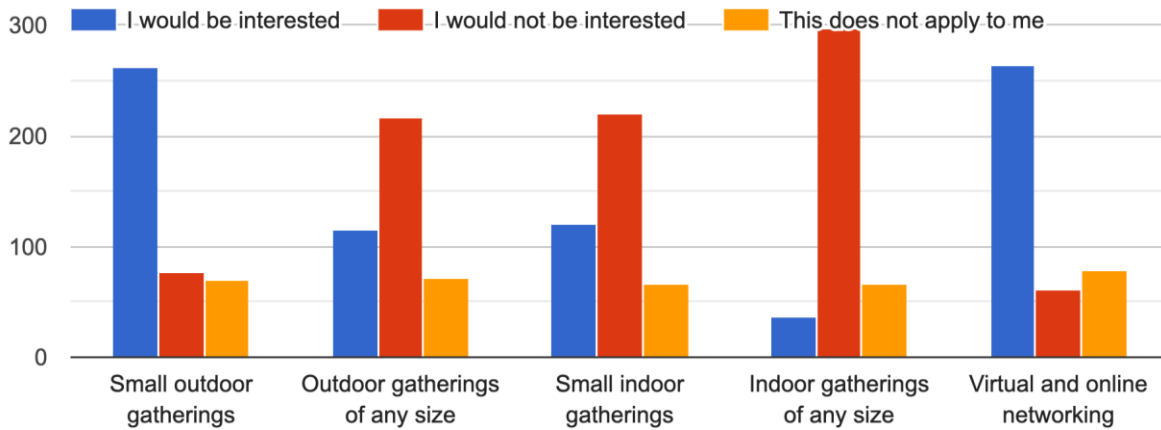
The overwhelming majority of respondents indicated that they would not feel comfortable attending large indoor events (77.9%, 339 respondents), large outdoor events (49.0%, 213 respondents), indoor concerts (77.5%, 337 respondents), classes (44.4%, 193 respondents), religious services (43.0%, 187 respondents), and conferences or tradeshows (63.0%, 274 respondents) at this time, even while adhere to appropriate social distancing guidelines.

COMPARED TO THE PREVIOUS SURVEY

Similar to the previous survey, an overwhelming number of survey respondents are not comfortable attending large indoor events, indoor concerts, or conferences at this time.

However, there have been sufficient decreases in the number of respondents who said they are “very comfortable” attending large outdoor events, classes, and religious services. For instance, 54.9% said they felt very comfortable attending religious services in the previous survey, but only 8.74% said the same in the second survey (*decreased* by 46.2%). Likewise, 23% of respondents said they felt very comfortable attending large outdoor events in the previous survey, but only 11.3% said the same in the second survey (*decreased* by 34.9%).

Q4: If you previously attended in-person business or social networking events before the pandemic, please indicate your interest today in the following types of activities:

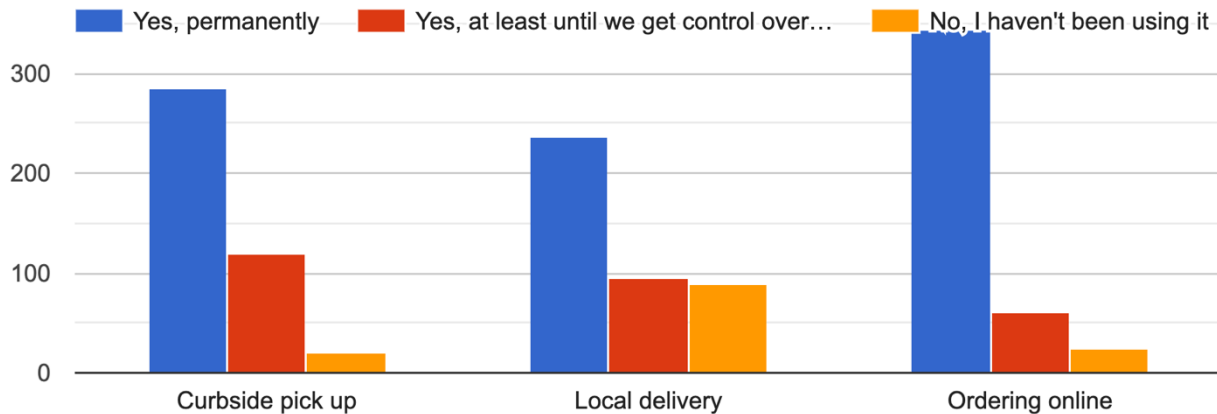


The two social activities that currently have the most support and interest from respondents include small outdoor gatherings (60.5%, 263 respondents) and virtual or online networking (60.7%, 264 respondents). Indoor gatherings of any size (68.3%, 297 respondents) seems to generate the least interest, followed by small indoor gatherings (50.6%, 220 respondents) and outdoor gatherings of any size (49.7%, 216 respondents).

COMPARED TO THE PREVIOUS SURVEY

This question was not included in the previous survey.

Q5: Which convenience options would you like to see continued?



Many respondents said they would like convenience options to continue permanently, especially ordering online (78.9%, 343 respondents) and curbside pick-up (65.5%, 285 respondents).

COMPARED TO THE PREVIOUS SURVEY

This question was adapted from the previous survey. This question originally only asked about the continuance of curbside options. Previously, 50.8% of respondents said they wanted to see curbside options continue at least until the spread of coronavirus is more controlled and another 37.5% of respondents said they wanted to see curbside options continue permanently. Now, the majority of respondents are looking to add curbside, delivery, and online options on a more permanent basis.

Q6: When thinking about how you hear about products, services, menu items, or specials from smaller, locally owned businesses, indicate ways they might capture your attention:

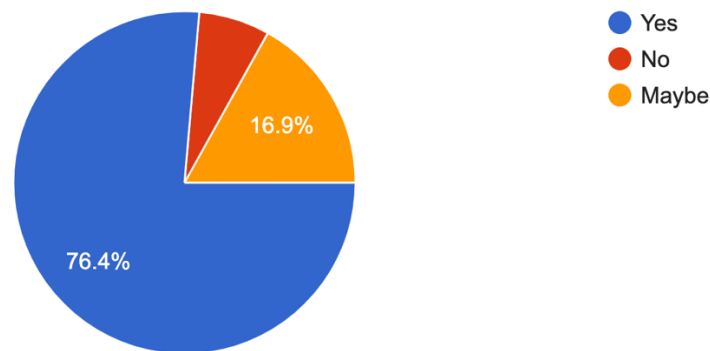
- 76.6% said Facebook
- 76.4% said word of mouth
- 54.9% said online search engines
- 53.7% said Harrisonburg Downtown Renaissance's social media or newsletter
- 43.7% said Instagram
- 24.5% said radio advertisements

COMPARED TO THE PREVIOUS SURVEY

This question was not included in the previous survey.

Q7: Are you more comfortable going into businesses that limit the number of patrons inside at one time?

Over three-fourths of respondents reported they feel more comfortable going into businesses that limit the number of patrons allowed inside at any given time (76.4%, 330 respondents).

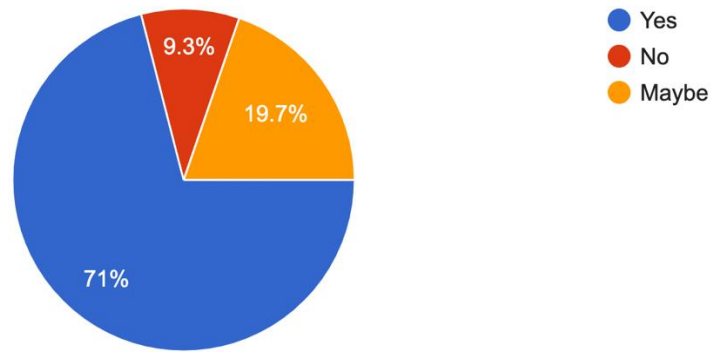


COMPARED TO THE PREVIOUS SURVEY

The percentage of respondents who answered “yes” to this question increased by 9.4% (67.0% in the previous survey, compared to 76.4% in this survey). In the previous survey, there was an additional question that asked specifically about level of comfort patronizing restaurants that had fewer tables or limits on the number of dine-in customers at a time. For comparison, 58.2% had either said that they are or would be more comfortable dining at those establishments.

Q8: Would you like to see more “touch-free” payment options?

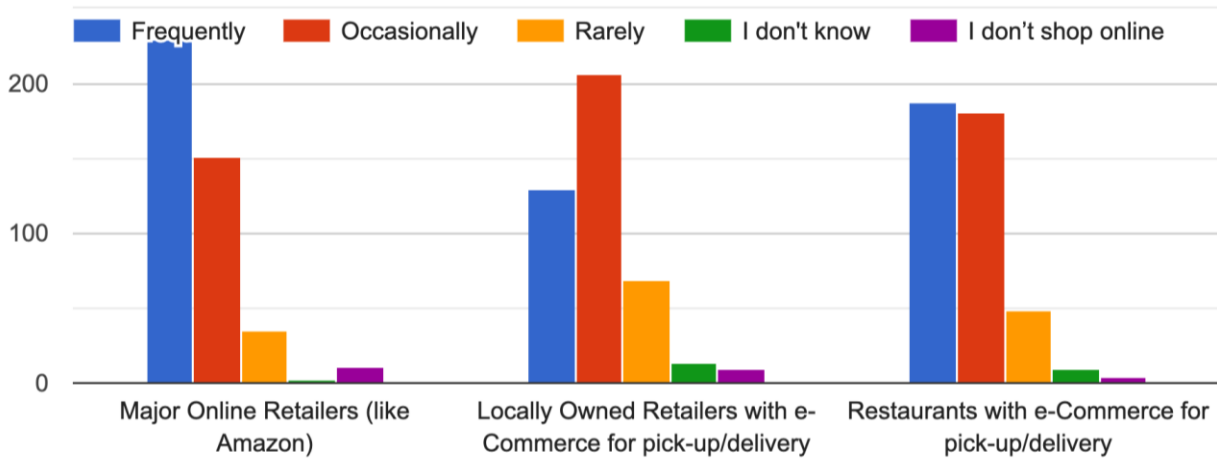
Most respondents indicated that they would like to see more touch-free payment options as part of local response to COVID-19 (71.0%, 306 respondents).



COMPARED TO THE PREVIOUS SURVEY

The results from this question remained relatively stable. In the first survey, 75.3% of respondents indicated they were interested in using more touch-free payment options, with another 13.3% saying “maybe.” In this survey, there was a slight decrease in the number of respondents who would like to see more touch-free options, as well as an increase in the number who said “maybe.” This could be a result of increased adoption of these practices since the previous survey. Note that there were similar percentages of respondents that said they would not like to see more touch-free payment options in both surveys (9.8% in the previous survey, compared to 9.3% in this survey).

Q9: Think about your ONLINE shopping habits pre-COVID-19. In the coming months, how frequently do you expect to shop online with the following businesses:



Survey respondents indicated plans to continue shopping online at major retailers either frequently (52.6%, 229 respondents) or occasionally (34.7%, 151 respondents) in the coming months. Many also said they plan to continue shopping at locally owned retailers with e-commerce for pick-up/delivery options occasionally (47.4%, 206 respondents), and possibly even, frequently (29.9%, 130 respondents). Similar numbers can also be seen with restaurants that have e-commerce options. There is a relatively even number of respondents who said they would dine with these establishments either frequently (43.0%, 187 respondents) or occasionally (41.4%, 180 respondents). Across all categories, no more than 16% said they would rarely shop or purchase online.

COMPARED TO THE PREVIOUS SURVEY

The same patterns were exhibited in the previous survey, with the majority indicating they would frequently shop online at major retailers and occasionally shop at locally owned retailers with e-

commerce for pick-up/delivery. Likewise, there were relatively even numbers of respondents that said they would frequently or occasionally patronize restaurants with e-commerce options.

Q10: Since COVID-19, have there been any safety precautions or business operations that have made you feel UNCOMFORTABLE? 295 responses.

Survey respondents expressed the most concern and discomfort when businesses do not follow or enforce CDC/VDH recommendations, especially regarding lack of masks and misuse of gloves. Other practices customers are uncomfortable with include: having to sign receipts as part of contactless payment, too many people in indoor spaces/lack of social distancing, and other customers' behaviors.

Here are some sample responses:

- "If masks are required and I see that they are not enforced, I will not go into that business again. It makes me very uncomfortable if I see people not wearing a mask. I have abandoned my full basket & have left stores when I witness someone sneezing over the merchandise unmasked."
- "Patrons commenting on social media making light of businesses adopting safety precautions."
- "1) I have been uncomfortable being asked to sign a credit card receipt when I'm picking up an item for which I have paid online. I think the purpose of paying online is to ensure contactless pickup. 2) I do not want to patronize businesses where employees are wearing masks below their noses or not wearing them at all. 3) Employees wearing gloves...unless they are changed between customers the gloves protect them, but not me."
- "We have been staying home utilizing online services, no contact deliveries, and curbside pickups. No complaints or concerns about these options."
- "The true lack of social distancing in restaurants. I work in one and it is impossible."
- "People touching items, then putting them back on the shelf."
- "I have been uncomfortable because establishments haven't adopted safety precautions, or aren't following the ones they have adopted!"
- "Handling cash/cards with the same gloves as preparing/packing food. Either don't wear gloves and use hand sanitizer or have one person prepare/package and another collect payment."

COMPARED TO THE PREVIOUS SURVEY

Very similar responses were reflected in the previous survey. The general theme is that respondents are uncomfortable when businesses do not follow CDC/VDH recommendations. They also expressed discomfort with customers and staff not wearing facemasks, having to sign receipts during touch-free payment options, lack of social distancing, and other customers' behaviors in the previous survey.

Q11: Since COVID-19, have there been any safety precautions or business operations that have made you feel COMFORTABLE? 321 responses.

Of all the responses, the most common were: appropriate mask wearing and social distancing by both employees and customers, providing hand sanitizer, installing plexiglass barriers, employees regularly

cleaning surfaces, online ordering and curbside pick-up options, and limiting the number of patrons allowed in the business at any given time.

Here are some sample responses:

- “I love it when employees open the doors to let you exit (doctor's offices seem to do this consistently) and when they provide masks. I really appreciate it when businesses clearly made an effort to put thought into public safety for me and their employees.”
- “Curb side pick-up, online ordering, businesses sharing what they are doing to be safe.”
- “Signs prominently displayed saying that masks are required; signage prominently displayed indicating physical spacing between patrons; information on business' website listing their safety precautions; reducing business hours to allow more time for cleaning and restocking; offering online ordering and curbside pickup.”
- “Mandating masks and turning away customers without. I know this is not easy and I so appreciate this.”
- “Plexiglass barrier, masks, as no-contact as possible.”
- “Consistent mask wearing and limitations on numbers of people in a business.”
- “Lady Jane had appointment only shopping experiences and wiped down all surfaces after customers left the store.”

COMPARED TO THE PREVIOUS SURVEY

In the previous survey, the most common responses to this question involved: employees wearing facemasks, providing hand sanitizer for customers, plexiglass barriers, employees visibly cleaning, curbside options, and paying ahead or online.

Q12: As a consumer, we appreciate your loyalty to local businesses. Please share with us any other ideas and suggestions that you feel would make your shopping/dining/service experiences more comfortable as we all navigate our new normal. 143 responses.

Here are some sample responses:

- “Transparency. Constant updates of operating status when changed. Notification of potential COVID exposure. Mask wearing. Worried about potential outbreak when JMU students arrive in town and how business will respond to a potential outbreak.”
- “I answered this questionnaire earlier but forgot to mention I appreciate stores that open at 6:00 or 7:00 am, & those that have senior hours!!!”
- “Personally, I think it's better to err on the side of caution and to be explicit about connecting business practices to the scientific consensus about what is and is not safe.”
- “Please thank downtown businesses who have chosen to Continue on despite their challenges of COVID. Continue to inform our community via TV, newspaper, social media, etc., what shops

are doing to stay viable, how city/county govt is helping businesses. Post a regular update about all the businesses downtown and how to access them - including govt service such as courthouse, social services, Free clinic, library, banks, law offices, etc.”

- “If everyone wears a mask, I am more inclined to visit that store again & again. If mask wearing is not strictly enforced, I will not return there again even when COVID is gone.”
- “Using JMU students to help get some businesses to a better place of being able to order online. Some stores are still not well-equipped for this and unfortunately, it then makes it easier to shop somewhere else.”

COMPARED TO THE PREVIOUS SURVEY

In the previous survey, there were approximately equal proportions of respondents whose comments had themes of either: ‘businesses should reopen’ or ‘it is too soon to reopen’. In this survey, the most common themes were either reiterating the necessity of following CDC/VDH guidelines or providing ideas for how to make reopening as successful as possible.