COVID-19 Impact on Iowa Non-profits Survey 4 Report

Final Aggregate Findings – July, 21, 2022

Research conducted by:
University of Northern Iowa
Business & Community Services
Institute for Decision Making | Strategic Marketing Services
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Project Design Overview

The Iowa Economic Development Authority (IEDA) once again partnered with the University of Northern Iowa’s Institute for Decision Making (IDM) and Strategic Marketing Services (SMS) to survey businesses and organizations across the state about what they are experiencing and how the businesses and organizations are handling post-pandemic economic challenges. The survey was launched on Wednesday, March 16, 2022 and was closed at 5 pm on Friday, April 15, 2022. Nearly 4,000 businesses and organizations participated, with 377 identified as being Non-profits.

This survey was funded by the U.S. Economic Development Administration.

U.S. ECONOMIC DEVELOPMENT ADMINISTRATION
Demographics

Geographic Coverage

Non-Profit participation was achieved across the vast majority of the state, with the highest concentrations in urban areas such as Des Moines, Cedar Rapids, Iowa City and the Quad Cities.
Organization’s Industry Sector

More than 20% of respondents reported that their organization’s primary industry was of the following: Health Care and Social Assistance (28.2%), Other Services (23.1%), and Arts, Entertainment and Recreation (22.2%). 14.5% of respondents reported Educational Services. Less than 5% of respondents reported the following: Public Administration (3.7%), Retail Trade (2.6%), Accommodation and Food Services (2.0%), Finance and insurance (1.7%). The remaining primary industries were reported by less than 1% of respondents.

<table>
<thead>
<tr>
<th>Industry</th>
<th>Aggregate N=377</th>
</tr>
</thead>
<tbody>
<tr>
<td>Health care and Social Assistance</td>
<td>28.2%</td>
</tr>
<tr>
<td>Other services</td>
<td>23.1%</td>
</tr>
<tr>
<td>Arts, Entertainment and Recreation</td>
<td>22.2%</td>
</tr>
<tr>
<td>Educational Services</td>
<td>14.5%</td>
</tr>
<tr>
<td>Public Administration</td>
<td>3.7%</td>
</tr>
<tr>
<td>Retail Trade</td>
<td>2.6%</td>
</tr>
<tr>
<td>Accommodation and Food Services</td>
<td>2.0%</td>
</tr>
<tr>
<td>Finance and insurance</td>
<td>1.7%</td>
</tr>
<tr>
<td>Construction</td>
<td>0.9%</td>
</tr>
<tr>
<td>Professional, Scientific, and Technical Services</td>
<td>0.9%</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>0.3%</td>
</tr>
<tr>
<td>Utilities</td>
<td>0.0%</td>
</tr>
<tr>
<td>Wholesale Trade</td>
<td>0.0%</td>
</tr>
<tr>
<td>Transportation and Warehousing</td>
<td>0.0%</td>
</tr>
<tr>
<td>Administrative support and Waste Management and Remediation Services</td>
<td>0.0%</td>
</tr>
<tr>
<td>Agriculture, Forestry, Fishing and Hunting</td>
<td>0.0%</td>
</tr>
<tr>
<td>Real Estate and Rental and Leasing</td>
<td>0.0%</td>
</tr>
<tr>
<td>Information</td>
<td>0.0%</td>
</tr>
<tr>
<td>Management of Companies and Enterprises</td>
<td>0.0%</td>
</tr>
<tr>
<td>Mining, Quarrying, and Oil and Gas Extraction</td>
<td>0.0%</td>
</tr>
<tr>
<td>Not sure</td>
<td>0.0%</td>
</tr>
</tbody>
</table>
**Ownership Type**

A majority of respondents reported that their organization is not classified as any of the mentioned ownership types (93.9%).

<table>
<thead>
<tr>
<th>Ownership Type</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Woman owned</td>
<td>2.9%</td>
</tr>
<tr>
<td>Veteran owned</td>
<td>1.9%</td>
</tr>
<tr>
<td>Family owned</td>
<td>1.6%</td>
</tr>
<tr>
<td>Employee owned</td>
<td>1.3%</td>
</tr>
<tr>
<td>Minority owned</td>
<td>0.8%</td>
</tr>
<tr>
<td>Native American owned</td>
<td>0.3%</td>
</tr>
<tr>
<td>Foreign owned</td>
<td>0.0%</td>
</tr>
<tr>
<td>None of these</td>
<td>93.9%</td>
</tr>
</tbody>
</table>

N=377

Significant testing among respondent demographic groups was performed and is fully presented in Appendix A. The following statistically significant differences by industry sector are highlighted.

- Respondents in the Other Services (4.9%) industry are significantly more likely to be classified as Veteran owned as compared to the Arts, Entertainment and Recreation (0.0%), and Health Care and Social Assistance (0.0%) industry.
- Respondents in the Metro counties (5.5%) are significantly more likely to report that they are woman owned as compared to respondents in the Non-Metro counties (0.5%).
Employment

Just under half (45.4%) of the survey respondents were small businesses with fewer than 10 employees and 21.2% had 10 to 24 employees. A total of 7.2% reported having 25 to 49 employees and 6.6% reported 50 to 99 employees. In addition, 13.0% reported having 100 to 499 employees and 2.7% reported 500 or more employees.

Significant testing among respondent demographic groups was performed and is fully presented in Appendix A. However, no statistically significant findings of note are highlighted here.
Annual Revenue for 2021

A total of 309 respondents provided 2021 annual revenue information for a total sum of $1,270,217,400 using mid-point calculations. The average 2021 annual revenue was $4,110,735.92 with a median of $374,950.00. 62 respondents were unsure or did not provide an answer.

Just over half of the respondents reported an annual revenue of less than $1 million for 2021, while 19.7% indicated an annual revenue of $1 to $9.9 million. Only 7.8% of the respondents reported an annual revenue of $10 million or more with 10.0% preferring not to answer.

Significant testing among respondent demographic groups was performed and is fully presented in Appendix A. However, no statistically significant findings of note are highlighted here.
Survey Results
Was your business organization in existence prior to March 2020?

Nearly all respondents (99.2%) indicated their organization was in existence prior to March 2020.

Significant testing among respondent demographic groups was performed and is fully presented in Appendix A. However, no statistically significant findings of note are highlighted here.
At the present time, are the effects of current economic conditions created due to the lasting impacts of the coronavirus pandemic directly impacting your organization?

Almost two-thirds (62.1%) of respondents have been negatively impacted by current economic conditions created due to the lasting impacts of the (COVID-19) pandemic, while just 6.1% were positively impacted. Just over 20% of respondents have not been directly impacted at the time of the survey.

![Bar chart showing the percentage of respondents impacted by economic conditions](image)

<table>
<thead>
<tr>
<th></th>
<th>Yes, negatively</th>
<th>No direct impact</th>
<th>Not sure</th>
<th>Yes, positively</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aggregate N=377</td>
<td>62.1%</td>
<td>20.2%</td>
<td>11.7%</td>
<td>6.1%</td>
</tr>
</tbody>
</table>

Significant testing among respondent demographic groups was performed and is fully presented in Appendix A. The following statistically significant differences are highlighted.

- Respondents in the Other Services (25.9%) industry were significantly more likely to report no direct impact compared to respondents in the Arts, Entertainment, and Recreation (17.9%), Educational Services (17.6%), and Health Care and Social Assistance (11.1%) industries.
- Respondents in the Health Care and Social Assistance (73.7%) industry are significantly more likely to report a negative impact compared to respondents in the Other Services (55.6%), Arts, Entertainment, and Recreation (65.4%), and Educational Services (68.6%) industries.
Are you currently experiencing or do you anticipate (within the next year) any negative disruptions among critical suppliers or service providers?

Around 70% of respondents are experiencing some measure of disruption among critical suppliers or service providers. More specifically, 7.1% are experiencing severe disruption, 29.3% indicated moderate disruption and 35.5% reported mild disruption. In addition, 17.9% indicated no disruptions for their organizations and 10.2% were unsure.

![Bar chart showing percentage of respondents experiencing different levels of disruption]

Significant testing among respondent demographic groups was performed and is fully presented in Appendix A. However, no statistically significant findings by industry sector were found.
Among the respondents experiencing some level of disruption, over half (54.9%) are experiencing a shortage of supplies or inputs, while 41.9% are experiencing delivery delays due to supply constraints. About 10.3% are experiencing difficulty in moving or shipping goods, and just over a third of the respondents (34.4%) reported experiencing some other disruption.

Other responses include:
- Employee shortage (35)
- Expenses increasing (12)
- Demand (11)
- Funding (10)
- Health (7)
- Cash flow (4)
- Closure (3)
- Delays (3)

Significant testing among respondent demographic groups was performed and is fully presented in Appendix A. The following statistically significant differences are highlighted.

- Respondents with 6 to 24 (56.1%) and 25 or more employees (67.4%) were significantly more likely to report a shortage of supplies or inputs compared to respondents with 5 or less employees (40.8%).
- Respondents with 25 or more employees (26.9%) were significantly more likely to report a shortage of supplies or inputs compared to respondents with 6 to 24 employees (56.1%).
Which of the following are your organization’s top 3 concerns with respect to current economic conditions created due to the lasting impacts of the coronavirus pandemic?

The top organizational concerns with respect to current economic conditions created due to the lasting impacts of the coronavirus pandemic include Inflation (49.3%) and Revenue loss (41.4%).

A second tier of concerns included Employee health/well-being (32.9%), Cash Flow (29.7%), and Decreasing consumer confidence/spending (24.9%). The least concern was indicated for Workforce availability (9.5%), Workforce reduction (8.6%), and Lower productivity (5.3%).

Other responses include:

- Employee shortage (7)
- Additional expenses (6)
- Decreased attendance (5)
- Demand (5)
- Health (5)
- Supply shortage (4)
- Funding (3)
- Decreased enrollment (3)
- Closure

Significant testing among respondent demographic groups was performed and is fully presented in Appendix A. The following statistically significant differences are highlighted.

- Respondents in the Arts, Entertainment, and Recreation (41.0%) industry were significantly more likely to report cash flow as one of their top 3 concerns compared to respondents in the Educational services (17.6%), Health Care and Social Assistance (27.3%), and Other Services (30.9%) industries.
• Respondents in the Health Care and Social Assistance (81.8%) industries are significantly more likely to report workforce availability as one of their top 3 concerns as compared to respondents in the Arts, Entertainment, and Recreation (33.3%), Educational Services (66.7%), and Other Services (32.1%) industries.
How challenging has it been for your organization to address your top 3 concerns?

As a follow-up to identifying their organization’s top three concerns, respondents were also asked to share how challenging each concern has been. Percentages for extremely and very challenging have been combined to help identify the most difficult concerns. Workforce availability (80.0%), Workforce reduction (77.8%), and Lower productivity (70.0%) were identified most often as being extremely or very challenging.

A second tier of extremely or very challenging concerns included Revenue loss (53.2%), Cash flow (50.9%), Inflation (43.0%), and Employee health/well-being (41.1%). The lowest level of extremely or very challenging concern was expressed for Decreasing consumer confidence/spending (36.2%) and Impact on tax and trade issues (37.6%).

<table>
<thead>
<tr>
<th>Concern</th>
<th>Extremely Challenging</th>
<th>Very Challenging</th>
<th>Moderately Challenging</th>
<th>Slightly Challenging</th>
<th>Not at all Challenging</th>
<th>Not sure</th>
</tr>
</thead>
<tbody>
<tr>
<td>Workforce availability (N=195)</td>
<td>48.2%</td>
<td>31.8%</td>
<td>11.8%</td>
<td>7.2%</td>
<td>0.5%</td>
<td>0.5%</td>
</tr>
<tr>
<td>Workforce reduction (N=36)</td>
<td>41.7%</td>
<td>36.1%</td>
<td>8.3%</td>
<td>8.3%</td>
<td>2.8%</td>
<td>2.8%</td>
</tr>
<tr>
<td>Revenue loss (N=156)</td>
<td>24.4%</td>
<td>28.8%</td>
<td>34.0%</td>
<td>12.2%</td>
<td>0.0%</td>
<td>0.6%</td>
</tr>
<tr>
<td>Cash flow (N=112)</td>
<td>22.3%</td>
<td>28.6%</td>
<td>34.8%</td>
<td>13.4%</td>
<td>0.9%</td>
<td>0.0%</td>
</tr>
<tr>
<td>Lower productivity (N=20)</td>
<td>20.0%</td>
<td>50.0%</td>
<td>20.0%</td>
<td>10.0%</td>
<td>0.0%</td>
<td>0.0%</td>
</tr>
<tr>
<td>Inflation (N=186)</td>
<td>13.4%</td>
<td>29.6%</td>
<td>43.5%</td>
<td>11.8%</td>
<td>0.0%</td>
<td>0.0%</td>
</tr>
<tr>
<td>Employee health/well being (N=124)</td>
<td>12.1%</td>
<td>29.0%</td>
<td>37.1%</td>
<td>21.8%</td>
<td>0.0%</td>
<td>0.0%</td>
</tr>
<tr>
<td>Decreasing consumer confidence/spending (N=94)</td>
<td>11.7%</td>
<td>24.5%</td>
<td>42.6%</td>
<td>18.1%</td>
<td>1.1%</td>
<td>1.5%</td>
</tr>
<tr>
<td>Impact on tax and trade issues (N=16)</td>
<td>6.3%</td>
<td>31.3%</td>
<td>25.0%</td>
<td>31.3%</td>
<td>0.0%</td>
<td>6.3%</td>
</tr>
<tr>
<td>Other, please specify (N=43)</td>
<td>39.5%</td>
<td>39.5%</td>
<td>14.0%</td>
<td>4.7%</td>
<td>0.0%</td>
<td>2.3%</td>
</tr>
</tbody>
</table>

Significant testing among respondent demographic groups was performed and is fully presented in Appendix A. The following statistically significant differences are highlighted.

- Respondents in the Health Care and Social Assistance (37.0%) industry were significantly more likely to report their top 3 concern of cash flow as very challenging compared to respondents in the Arts, Entertainment and Recreation, Educational services (22.2%) and Other Services (24.0%) industries.
- Respondents with 5 or less employees (40.4%) were significantly more likely to report having cash flow as one of their top 3 concerns compared to respondents with 6 to 24 employees (30.4%) and 25 or more employees (18.0%).
- Respondents with 6 to 24 employees (30.4%) were significantly more likely to report having cash flow as one of their top 3 concerns compared to respondents with 25 or more employees (18.0%).
- Respondents with annual sales of $250K and less (40.5%) were significantly more likely to report having cash flow as one of their top 3 concerns compared to respondents with annual sales of $250K to $999.9K (28.9%), $1M to $9.9M (20.5%), and $10M or more (17.2%).
In the last 6 months, has your organization done any of the following?

Respondents frequently reported the following tasks as things their organization has done in the past six months: Identified and hired new employees (40.6%), Evaluated work arrangements for employees (38.5%), and Provide better safety for customer and employees (38.5%).

A second tier of frequently reported tasks include: Offered new/additional training for employees (28.1%), and Increased or pivoted marketing or sales efforts (27.1%), Obtained financial assistance or additional capital (27.1%), Adjusted their business model (24.7%), Increased prices due to inflation (23.3%), Identified new supply chain options (18.3%).

The least reported tasks included Developed online sales or websites (9.3%), Temporarily closed the business (7.4%), and Other (7.4%).

Other responses include:

- Grants/funding (6)
- Switched to online (5)
- Closure (5)
- Changed staff (3)
- Changed hours (3)
- Expanded services (2)
- Increased advertising

Significant testing among respondent demographic groups was performed and is fully presented in Appendix A. The following statistically significant differences are highlighted.

- Respondents with 6 to 24 employees (32.2%) were significantly more likely to report that they have increased prices due to inflation compared to respondents with 5 or less employees (18.4%) and 25 or more employees (22.5%).
• Respondents with annual sales of less than $250K (26.1%), $250K to $999.9K (28.9%), and $1M to $9.9M (31.5%) were significantly more likely to report needing to identify new supply chain options in the last 6 months compared to respondents with annual sales of $10M or more (3.4%).

• Respondents with annual sales of $10M or more (51.7%) were significantly more likely to report needing to offer new/additional training for employees in the last 6 months compared to respondents with annual sales of $250K and less (17.6%), $250K to $999.9K (25.0%), and $1M to $9.9M (39.7%).
In the next 6 months, do you think your organization will need to do any of the following?

The most reported tasks respondents think their organization will need to do in the next six months is Identify and hire new employees (48.0%).

A second tier of frequently reported tasks include: Increase prices due to inflation (27.1%), Offer new/additional training for employees (26.8%), Increase or pivot marketing or sales efforts (24.9%), Evaluate work arrangements for employees (23.9%), Adjust their business model (22.5%), Obtain financial assistance or additional capital (21.2%), and Identify new supply chain options (20.4%).

The least reported tasks are Provide better safety for employees and customers (13.3%), Develop online sales or websites (8.5%), and Permanently close the business (0.5%).

Other responses include:

- Change hours (3)
- Planning future events (3)
- Change staff (2)
- Change wages (2)
- Closure (2)
- Health

Significant testing among respondent demographic groups was performed and is fully presented in Appendix A. The following statistically significant differences are highlighted.

- Respondents in the Arts, Entertainment & Recreation (37.2%) industry were significantly more likely to report needing to increase or pivot marketing or sales efforts in the next 6 months as compared to respondents in the Educational Services (23.5%), Health Care and Social Assistance (22.2%), and other services (12.3%) industries.
• Respondents in the Health Care and Social Assistance (25.3%) industry were significantly more likely to report needing to learn how to better provide for the safety of customers and employees in the next 6 months as compared to respondents in the Arts, Entertainment & Recreation (11.5%), Educational Services (13.7%), and Other Services (7.4%) industries.

• Respondents with 25 or more employees (23.4%) were significantly more likely to report that they will have to learn how to better provide for the safety of their customers and employees compared to respondents with 5 or less employees (10.3%) and 6 to 24 employees (8.7%).

• Respondents with 25 or more employees (78.4%) were significantly more likely to report that they will have to identify and hire new employees compared to respondents with 5 or less employees (25.7%) and 6 to 24 employees (50.4%).

• Respondents with 25 or more employees (49.5%) were significantly more likely to report that they will have to offer additional training for employees compared to respondents with 5 or less employees (13.2%) and 6 to 24 employees (24.3%).

• Respondents with 25 or more employees (39.6%) were significantly more likely to report that they will have to evaluate work arrangements for employees compared to respondents with 5 or less employees (13.2%) and 6 to 24 employees (23.5%).
Please indicate whether your organization is currently doing, considering, or not considering each of the following.

Respondents most frequently reported the following tasks as things their organization is currently doing: Relying more heavily on communication services for their business operations (52.0%), Expanding their organization through digital means and related technologies (33.7%), and Increasing cash reserves (32.6%). Those tasks most often categorized as being under consideration include Expanding their organization through digital means and related technologies (21.8%), Creating or revising their supply chain strategy (19.6%) and Increasing cash reserves (17.0%). Tasks reported as being not under consideration at this time most often are Utilizing contractor services to segment workforce needs (31.0%), Increasing cash reserves (29.2%), Investing in work automation (25.2%), and Creating or revising their supply chain strategy (24.9%).

<table>
<thead>
<tr>
<th>N=377</th>
<th></th>
<th>Currently Doing</th>
<th>Considering Implementing</th>
<th>No consideration at this time</th>
<th>Not applicable/ Not sure</th>
</tr>
</thead>
<tbody>
<tr>
<td>Relying more heavily on communications services for our business operations</td>
<td>52.0%</td>
<td>9.3%</td>
<td>15.9%</td>
<td>22.8%</td>
<td></td>
</tr>
<tr>
<td>Expanding our organization through digital means and related technologies</td>
<td>33.7%</td>
<td>21.8%</td>
<td>17.8%</td>
<td>26.8%</td>
<td></td>
</tr>
<tr>
<td>Increasing cash reserves</td>
<td>32.6%</td>
<td>17.0%</td>
<td>29.2%</td>
<td>21.2%</td>
<td></td>
</tr>
<tr>
<td>Creating or revising our supply chain strategy</td>
<td>17.5%</td>
<td>19.6%</td>
<td>24.9%</td>
<td>37.9%</td>
<td></td>
</tr>
<tr>
<td>Utilizing contractors/contract services to segment workforce needs</td>
<td>15.6%</td>
<td>13.8%</td>
<td>31.0%</td>
<td>39.5%</td>
<td></td>
</tr>
<tr>
<td>Investing more in work automation</td>
<td>6.9%</td>
<td>9.5%</td>
<td>25.2%</td>
<td>58.4%</td>
<td></td>
</tr>
</tbody>
</table>

Significant testing among respondent demographic groups was performed and is fully presented in Appendix A. The following statistically significant differences are highlighted.

- Respondents with 25 or more employees (65.8%) were significantly more likely to report that they are currently relying more heavily on communications services for their business operations compared to respondents with 6 to 24 employees (44.3%), and 5 or less employees (50.7%).
- Respondents with annual sales of $250K to $999.9K (47.4%), and $1M to $9M (38.4%) were significantly more likely to report currently increasing cash reserves compared to respondents with annual sales of $250K or less (29.8%), and $10M or more (27.6%).
- Respondents in the Metro counties (63.0%) were significantly more likely to report that they are currently relying more heavily on communications services for their business operations compared to Non-Metro Respondents (41.8%).
Do you plan on making capital expenditures in Industry 4.0 technologies or applications focused on interconnectivity, automation and real-time data in 2022?

The majority of respondents report no plans to make capital expenditures in industry 4.0 (78.5%), while 8.2% have plans to make capital expenditures and 3.4% have already made capital expenditures in industry 4.0.

Other responses include:

- Unsure (4)
- Apr-June 2022 (3)
- July-Sep 2022 (2)
- Oct-Dec 2022 (2)
- 2023 (2)

Significant testing among respondent demographic groups was performed and is fully presented in Appendix A. The following statistically significant differences are highlighted.

- Respondents with 25 or more employees (8.1%) were significantly more likely to report having plans to make capital expenditures in industry 4.0 compared to respondents with 5 or less employees (1.5%) and 6 to 24 employees (1.7%).
- Respondents with annual sales of $10M or more (34.5%) were significantly more likely to report having already made capital expenditures in industry 4.0 compared to respondents with annual sales of $250K and less (2.3%), $250K to $999.9K (7.9%), and $1M to $9.9M (8.2%).
- Respondents with annual sales of $10M or more (13.8%) were significantly more likely to report having plans to make capital expenditures in industry 4.0 compared to respondents with annual sales of $250K and less (0.0%).
What types of investments have you made/will be making?

The top investments that respondents have reported making/plan on making include Cybersecurity (65.9%) and Software/ERP/Inventory Tracking (50.0%). Other moderately utilized or planned investments included System integration (43.2%), Cloud computing systems (40.9%), and Sensor/Scanning/Data Analytics (38.6%). Least utilized were Additive Manufacturing/3d printing (2.3%) and Augmented/Virtual reality (4.5%).

Other responses include:

- Technological enhancements (4)
- Online enhancements (2)
- Physical improvements

Significant testing among respondent demographic groups was performed and is fully presented in Appendix A. The following statistically significant differences are highlighted.

- Respondents with annual sales of $250K to $999.9K (87.5%) were significantly more likely to report investing in cloud computing systems compared to respondents with annual sales of $250K and less (66.7%), $1M to $9.9M (40.0%), and $10M or more (7.1%).
Please estimate what percentage increase or decrease of workplace footprints and workplace occupancy your organization has experienced now compared to before March 2020.

Respondents reported a mean decrease of 10.89% for current workplace occupancy compared to pre-pandemic. Similarly, respondents also reported a mean decrease of 2.37% for current workplace footprint compared to pre-pandemic.

Significant testing among respondent demographic groups was performed and is fully presented in Appendix A. However, no statistically significant findings by industry sector were found.
Do you expect this percentage to decrease, remain the same, or increase in the next six months?

Nearly 70% of respondents expect their workplace footprint percentage to remain the same in the next 6 months, and 61.3% of respondents expect their workplace occupancy percentage to remain the same in the next 6 months. Additionally, respondents reported both their workplace footprint and occupancy are more likely to increase rather than decrease.

Significant testing among respondent demographic groups was performed and is fully presented in Appendix A. The following statistically significant differences are highlighted.

- Respondents with annual sales of $250K to $999.9K (69.7%) were significantly more likely to report that workplace occupancy remained the same compared to respondents with annual sales of $10M or more (55.2%).
- Respondents with 25 or more employees (18.9%) were significantly more likely to report an increase in workplace footprint compared to respondents with 5 or less employees (5.1%).
Please estimate what percentage of your organization’s employees were eligible to work remotely in February 2022 compared to what percentage worked remotely in February 2022.

Respondents report 38.3% of their employees were eligible to work remotely in February 2022, while the percentage of employees working remotely in February 2022 was 23.5%.

Significant testing among respondent demographic groups was performed and is fully presented in Appendix A. The following statistically significant differences by industry sector are highlighted.

- Respondents in the Other Services (55.05%) industry were significantly more likely to report a higher increase in employees eligible to work remotely in February 2022 compared to respondents in the Arts, Entertainment and Recreation (39.85%), Educational Services (39.92%), and Health Care and Social Assistance (25.88%) industries.
- Respondents in the Arts, Entertainment and Recreation (39.85%), and Educational Services (39.92%) industries were significantly more likely to report a higher increase in employees eligible to work remotely in February 2022 compared to respondents in the Health Care and Social Assistance (25.88%) industry.
Do you expect this percentage to decrease, remain the same, or increase in the next six months?

Just under three-quarters of respondents report they believe the percentage of people eligible to work remotely will remain the same in the next 6 months while only 6.6% indicated the percentage of people eligible to work will decrease. Similarly, just over two-thirds of respondents indicated the number of employees working remotely will remain the same.

Significant testing among respondent demographic groups was performed and is fully presented in Appendix A. The following statistically significant differences are highlighted.

- Respondents with annual sales of $1M to $9.9M (16.4%) were significantly more likely to report that remote work has remained the same compared to respondents with annual sales of $250K or less (8.4%).
- Respondents with annual sales of $10M or more (13.8%) were significantly more likely to report an increase in working remotely compared to respondents with annual sales of $250K or less (3.8%), and $250K to $999.9K (3.9%).
How has your company been impacted by remote work options that are
becoming more prevalent in the U.S. economy?

Just over 30% of respondents reported their organization has not been impacted by remote work options, while 21.5% reported their organization has been both positively and negatively impacted. Only 6.6% of respondents reported being negatively impacted by remote work options and 6.4% indicated positive impact.

Significant testing among respondent demographic groups was performed and is fully presented in Appendix A. The following statistically significant differences are highlighted.

- Respondents with annual sales of $10M or more (17.2%) were significantly more likely to report a positive impact on remote work compared to respondents with annual sales of $250K or less (5.3%), $250K to $999.9K (6.6%), and $1M to $9.9M (9.6%).
- Respondents in the Health Care and Social Assistance (10.1%) industry were significantly more negatively impacted by remote work options as compared to respondents in the Arts, Entertainment and Recreation (5.1%), and Other Services (2.5%) industries.
- Respondents with 25 or more employees (32.4%) were significantly more likely to report both positive and negative impact from remote work compared to respondents with 5 or less employees (19.9%) and 6 to 24 employees (14.8%).
- Respondents in Metro counties (9.9%) were significantly more likely to report a positive impact from remote work options as compared to Non-Metro counties (3.1%).
How difficult is it for your organization to attract new talent compared to before March 2020?

Respondents were asked to report the level of difficulty or ease in attracting new talent as compared to before March 2020. A scale of -5 (much more difficult) to +5 (much easier) was employed. Just under two-thirds indicated attracting new talent is More difficult while 33.3% reported No difference in the level of difficulty. Only 2.2% reported talent attraction as being Easier. The mean for all respondents was -2.24.

![Bar Chart]

Significant testing among respondent demographic groups was performed and is fully presented in Appendix A. The following statistically significant differences are highlighted:

- Respondents in the Health Care and Social Assistance (-3.15) industry were significantly more likely to report a higher difficulty attracting new talent compared to respondents in the Other Services (-1.53) industry.
- Respondents with 25 or more employees (-3.00) were significantly more likely to report a higher difficulty in attracting new talent as compared to before March 2020 compared to respondents with 6 to 24 employees (-2.24), and 5 or less employees (-1.53).
Is your organization utilizing any of the following measures to respond to a shortage of qualified applicants?

The top two measures most often utilized to respond to the shortage of qualified applicants included Expanding recruiting methods (39.3%) and Hiring less experienced workers and providing additional training (34.2%). Other measures commonly employed are Offering additional/enhanced benefits (17.8%), Hiring non-traditional workers (16.7%), Internships/Apprenticeships (16.7%), Offering above market compensation packages (15.1%), Hiring contractors (14.6%), Offering referral bonuses to current employees (14.1%), and Offering signing bonuses (13.0%).

Other responses include:

- Increased wages (3)
- Bonuses (2)
- Benefits

Significant testing among respondent demographic groups was performed and is fully presented in Appendix A. The following statistically significant differences are highlighted.

- Respondents in the Health Care and Social Assistance (53.5%) industry were significantly more likely to report hiring less experienced workers and providing additional training as compared to respondents in the Arts, Entertainment & Recreation (26.9%), Educational Services (43.1%), and Other Services (17.3%) industries.
- Respondents in the Health Care and Social Assistance (30.3%) industry were significantly more likely to report offering above market compensation packages to current employees as compared to respondents in the Arts, Entertainment & Recreation (10.3%), Educational Services (13.7%), and Other Services (7.4%) industries.
- Respondents with 25 or more employees (57.7%) were significantly more likely to report hiring less experienced workers and providing additional training compared to respondents with 5 or less employees (16.2%) and 6 to 24 employees (36.5%).
Respondents with annual sales of $1M to $9.9M (32.9%) and $10M or more (27.6%) were significantly more likely to report that they are offering additional/enhanced benefits compared to respondents with annual sales of $250K or less (10.7%), and $250K to $999.9K (17.1%).

Respondents in the Metro counties (21.0%) were significantly more likely to report hiring non-traditional workers as compared to respondents from Non-Metro counties (12.8%).

Respondents in the Metro counties (47.0%) were significantly more likely to report expanding recruiting methods as compared to respondents from Non-Metro counties (32.1%).
Which of the following do you think could help your organization be more successful recruiting and retaining new talent?

Respondents identified the following strategies as being most successful for recruiting and retaining new talent: Higher starting wages (61.8%), Better benefits (41.1%), More flexible schedules (24.4%), and Partnering with local students (23.1%). Other more moderately successful strategies employed are Tuition reimbursement (17.8%), More outreach to colleges/universities (16.9%), More outreach to different talent pools (15.9%), Remote work options (15.6%), and Better promotion of development opportunities (15.4%).

Other responses include:

- Higher pay (2)
- More interested talent pool (2)
- College partnership (2)
- Health support
- More work options

Significant testing among respondent demographic groups was performed and is fully presented in Appendix A. The following statistically significant differences are highlighted:

- Respondents in the Metro counties (22.7%) were significantly more likely to report tuition reimbursement as being successful compared to respondents from Non-Metro counties (13.3%).
- Respondents with annual sales of $10M or more (31.0%) were significantly more likely to report having better promotion of training/career development opportunities as being successful compared to
• Respondents with annual sales of $250K or less (12.2%), $250K to $999.9K (3.9%), and $1M to $9.9M (20.5%).

• Respondents with 25 or more employees (25.2%) were significantly more likely to report better promotion of training/career development opportunities as being successful compared to respondents with 5 or less employees (12.5%) and 6 to 24 employees (11.3%).

• Respondents with 25 or more employees (36.0%) were significantly more likely to report more outreach to colleges/universities as being successful compared to respondents with 5 or less employees (14.7%) and 6 to 24 employees (20.9%).

• Respondents with 25 or more employees (42.3%) were significantly more likely to report more flexible schedules as being successful compared to respondents with 5 or less employees (19.1%) and 6 to 24 employees (16.5%).

• Respondents in the Health Care and Social Assistance (54.5%) and Educational Services (51.0%) industries were significantly more likely to consider offering better benefits as being successful compared to respondents in the Arts, Entertainment and Recreation (25.6%), and Other Services (37.0%) industries.
What areas of assistance would be most helpful to your organization?

Respondents identified the following areas as being most helpful to their organization: Providing support to the non-profit sector (49.3%), Financial assistance (36.9%), Efforts to attract new population/workers to community (31.6%), and Marketing/Promotion (30.0%). Those areas identified least often are Supplies/services for operations (6.6%), Assistance for remote work (6.1%), and Tax relief (5.0%).

Other responses include:

- Non-profit (3)
- Funding
- Immigration
- Interest
- Healthcare

Significant testing among respondent demographic groups was performed and is fully presented in Appendix A. The following statistically significant differences are highlighted.

- Respondents with 25 or more employees (41.4%) were significantly more likely to report that childcare support for families would be most helpful to their organization compared to respondents with 5 or less employees (18.4%) and 6 to 24 employees (16.5%).
- Respondents with annual sales of $10M or more (62.1%) were significantly more likely to report childcare support for families as being most helpful to their organization compared to respondents with annual sales of $250K or less (13.0%), $250K to $999.9K (11.8%), and $1M to $9.9M (35.6%).
- Respondents with annual sales of $10M or more (27.6%) were significantly more likely to report modification of licensing and government regulations as being most helpful to their organization compared to respondents with annual sales of $250K or less (7.6%), and $250K to $999.9K (7.9%).
• Respondents with annual sales of $1M to $9.9M (19.2%) were significantly more likely to report workforce training/development as being most helpful to their organization compared to respondents with annual sales of $250K or less (7.6%), and $250K to $999.9K (3.9%).
Childcare Support for Families

Respondents were asked to provide more specific responses via a verbatim follow-up question. This text was analyzed to identify common response themes. The table below contains the most frequent multi-word phrases found in the open-ended responses for the childcare support for families.

<table>
<thead>
<tr>
<th>Phrase</th>
<th>Count</th>
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</thead>
<tbody>
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<td>child care</td>
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</tr>
<tr>
<td>increase availability</td>
<td>3</td>
</tr>
<tr>
<td>affordable child</td>
<td>2</td>
</tr>
<tr>
<td>care center</td>
<td>2</td>
</tr>
<tr>
<td>care option</td>
<td>2</td>
</tr>
<tr>
<td>care workforce</td>
<td>2</td>
</tr>
<tr>
<td>childcare facility</td>
<td>2</td>
</tr>
<tr>
<td>childcare option</td>
<td>2</td>
</tr>
<tr>
<td>childcare provider</td>
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</tr>
<tr>
<td>childcare stipend</td>
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<tr>
<td>day care</td>
<td>2</td>
</tr>
<tr>
<td>daycare option</td>
<td>2</td>
</tr>
<tr>
<td>financial assistance</td>
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</tr>
<tr>
<td>onsite daycare</td>
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</tr>
<tr>
<td>provide assistance</td>
<td>2</td>
</tr>
<tr>
<td>reasonable cost</td>
<td>2</td>
</tr>
</tbody>
</table>

Financial Assistance

Respondents were asked to provide more specific responses via a verbatim follow-up question. This text was analyzed to identify common response themes. The table below contains the most frequent multi-word phrases found in the open-ended responses for the financial assistance category.

<table>
<thead>
<tr>
<th>Phrase</th>
<th>Count</th>
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</thead>
<tbody>
<tr>
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</tr>
<tr>
<td>reimbursement rate</td>
<td>4</td>
</tr>
<tr>
<td>grant opportunity</td>
<td>3</td>
</tr>
<tr>
<td>operate fund</td>
<td>3</td>
</tr>
<tr>
<td>child care</td>
<td>2</td>
</tr>
<tr>
<td>covid relief</td>
<td>2</td>
</tr>
<tr>
<td>current staff</td>
<td>2</td>
</tr>
<tr>
<td>financial assistance</td>
<td>2</td>
</tr>
<tr>
<td>forgivable loan</td>
<td>2</td>
</tr>
<tr>
<td>grant fund</td>
<td>2</td>
</tr>
<tr>
<td>increase revenue</td>
<td>2</td>
</tr>
<tr>
<td>increase wage</td>
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</tr>
<tr>
<td>low income</td>
<td>2</td>
</tr>
<tr>
<td>offer benefit</td>
<td>2</td>
</tr>
<tr>
<td>profit organization</td>
<td>2</td>
</tr>
</tbody>
</table>
Marketing/Promotion Assistance

Respondents were asked to provide more specific responses via a verbatim follow-up question. This text was analyzed to identify common response themes. The table below contains the most frequent multi-word phrases found in the open-ended responses for the marketing/promotion assistance category.

<table>
<thead>
<tr>
<th>Phrase</th>
<th>Count</th>
</tr>
</thead>
<tbody>
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<td>social medium</td>
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<tr>
<td>market promotion</td>
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</tr>
<tr>
<td>financial assistance</td>
<td>3</td>
</tr>
<tr>
<td>profit organization</td>
<td>3</td>
</tr>
<tr>
<td>low cost</td>
<td>2</td>
</tr>
<tr>
<td>market option</td>
<td>2</td>
</tr>
<tr>
<td>tourism market</td>
<td>2</td>
</tr>
<tr>
<td>web presence</td>
<td>2</td>
</tr>
</tbody>
</table>
Modification of Licensing and Government Regulations

Respondents were asked to provide more specific responses via a verbatim follow-up question. This text was analyzed to identify common response themes. There were no significant multi-word phrases found in the open-ended responses for the modification of licensing and government regulations category.

Providing Support to Non-profit Sector

Respondents were asked to provide more specific responses via a verbatim follow-up question. This text was analyzed to identify common response themes. The table below contains the most frequent multi-word phrases found in the open-ended responses for the providing support to non-profit sector category.

<table>
<thead>
<tr>
<th>Phrase</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>grant opportunity</td>
<td>9</td>
</tr>
<tr>
<td>financial support</td>
<td>8</td>
</tr>
<tr>
<td>profit sector</td>
<td>4</td>
</tr>
<tr>
<td>additional fund</td>
<td>3</td>
</tr>
<tr>
<td>fund program</td>
<td>3</td>
</tr>
<tr>
<td>additional support</td>
<td>2</td>
</tr>
<tr>
<td>endow iowa</td>
<td>2</td>
</tr>
<tr>
<td>grant fund</td>
<td>2</td>
</tr>
<tr>
<td>huge load</td>
<td>2</td>
</tr>
<tr>
<td>increase grant</td>
<td>2</td>
</tr>
<tr>
<td>iowa tax</td>
<td>2</td>
</tr>
<tr>
<td>operate grant</td>
<td>2</td>
</tr>
<tr>
<td>profit grant</td>
<td>2</td>
</tr>
<tr>
<td>profit organization</td>
<td>2</td>
</tr>
<tr>
<td>support nonprofit</td>
<td>2</td>
</tr>
<tr>
<td>support program</td>
<td>2</td>
</tr>
<tr>
<td>tax benefit</td>
<td>2</td>
</tr>
</tbody>
</table>

Supplies/Services for my Operations

Respondents were asked to provide more specific responses via a verbatim follow-up question. This text was analyzed to identify common response themes. There were no significant multi-word phrases found in the open-ended responses for the supplies/services for my operations category.

Tax Relief

Respondents were asked to provide more specific responses via a verbatim follow-up question. This text was analyzed to identify common response themes. There were no significant multi-word phrases found in the open-ended responses for the tax relief category.
Assistance for Remote Work

Respondents were asked to provide more specific responses via a verbatim follow-up question. This text was analyzed to identify common response themes. There were no significant multi-word phrases found in the open-ended responses for the assistance for remote work category.

Workforce Training

Respondents were asked to provide more specific responses via a verbatim follow-up question. This text was analyzed to identify common response themes. There were no significant multi-word phrases found in the open-ended responses for the workforce training category.

Efforts to Attract New Populations/Workers to Community

Respondents were asked to provide more specific responses via a verbatim follow-up question. This text was analyzed to identify common response themes. There were no significant multi-word phrases found in the open-ended responses for the efforts to attract new populations/workers to community category.

Other Assistance

Respondents were asked to provide more specific responses via a verbatim follow-up question. This text was analyzed to identify common response themes. There were no significant multi-word phrases found in the open-ended responses for the other assistance category.
Does your organization have any business travel planned for 2022?

Just over 40% of respondents report their organization has no travel plans for 2022, while 37.1% of respondents report traveling domestically and just 2.4% are traveling internationally.

Significant testing among respondent demographic groups was performed and is fully presented in Appendix A. The following statistically significant differences are highlighted.

- Respondents with annual sales of $10M or more (65.5%) were significantly more likely to report traveling domestically in 2022 compared to respondents with annual sales of $250K or less (29.8%), $250K to $999.9K (36.8%), and $1M to $9.9M (45.2%).
- Respondents in the Metro counties (47.0%) were significantly more likely to report traveling domestically as compared to Non-Metro counties (28.1%).
Which of the following describe the nature of your organization’s planned business travel for 2022?

Among those organizations currently traveling, 64.0% of respondents report traveling for conferences, 28.9% for External meetings and 18.2% for Tradeshows. Additionally, 13.8% are traveling for internal company meetings and 12.0% for Sales/business development.

![Bar chart showing travel purposes and percentages]

Other responses include:
- Regular business activities (6)
- Fundraising (3)
- Meetings (3)
- Education (3)
- Concerts (2)

Significant testing among respondent demographic groups was performed and is fully presented in Appendix A. The following statistically significant differences were highlighted.

- Respondents in the Health Care and Social Assistance (34.0%), and Other Services (41.2%) industries were significantly more likely to have travel planned for external meetings as compared to respondents in the Arts, Entertainment & Recreation (7.1%), and Educational Services (17.2%) industry.
- Respondents with annual sales of $10M or more (55.0%) were significantly more likely to have travel planned for external company meetings planned for 2022 compared to respondents with annual sales of 250K or less (21.4%), $250K to $999.9K (27.3%), and $1M to $9.9M (39.1%).
- Respondents in the Metro counties (73.7%) were significantly more likely to have travel planned for conferences as compared to Non-Metro counties (53.3%).
Which of the following best describes your organization’s gross sales in 2021 compared to the previous year?

Just over 25.0% of respondents report their organization’s gross sales have significantly or somewhat increased, while just under 30.0% report gross sales have significantly or somewhat declined. 13.0% indicated gross sales have remained the same and 30.0% reported not applicable.

Significant testing among respondent demographic groups was performed and is fully presented in Appendix A. The following statistically significant differences are highlighted.

- Respondents in the Arts, Entertainment and Recreation (24.4%) industry was significantly more likely to report gross sales in 2021 as significantly declining compared to the previous year as compared to respondents in the Other Services (4.9%), Educational Services (3.9%) and Health Care and Social Assistance (13.1%) industries.
Which of the following best describes your organization’s international sales in 2021 compared to the previous year?

The majority of respondents report they do not have international sales (91.5%). Of the remaining respondents, 2.1% report international sales have significantly declined, 1.9% indicate international sales have remained the same, and 1.3% report international sales have declined.

Significant testing among respondent demographic groups was performed and is fully presented in Appendix A. However, no statistically significant differences were found.
Estimate the impact the coronavirus pandemic had on your organization’s 2021 revenue and employment as compared to 2020 levels.

Aggregately, respondent organizations indicated their 2021 revenues had decreased by a mean of -6.28% and a median of 0.0%. Employment impact was lower with a mean of -8.01% and a median of 0.0%.

Significant testing among respondent demographic groups was performed and is fully presented in Appendix A. The following statistically significant difference is highlighted.

- Respondents in the Non-Metro Counties (-11.40%) were significantly more likely to report a higher decrease in employee impact for 2021 compared to respondents in the Metro Counties (-4.68%).
Responses regarding the percentage change of current volunteers as compared to 2019 levels ranged from -100% to +100% with a mean of -17.1%. Responses were provided by 366 non-profit organizations.

Significance testing among respondent demographic groups was performed and is fully presented in Appendix A. The following statistically significant difference by industry sector is highlighted.

- The Professional, Scientific & Technical Services (-31.00%), Construction (-26.33%), Health Care and Social Assistance (-24.43%) and Educational Services (-24.43%) industry sectors reported a significantly larger decrease in the current number of volunteers compared to 2019 levels as compared to the Arts, Entertainment & Recreation (-9.12%), Accommodation & Food Services (-8.00%) and Manufacturing (0.00%) industry sectors.

The average decrease in demand for 2021 services compared to 2020 was 6.5%, and the average decrease in income for 2021 compared to 2020 was 17.0%. Responses for both comparisons ranged from -100% to +100% among 366 non-profit respondents.

Significance testing among respondent demographic groups was performed and is fully presented in Appendix A. The following statistically significant differences by industry sector are highlighted.

- The Construction (16.33%), Manufacturing (16.00%) and Finance & Insurance (15.67%) industry sectors reported a significantly higher current projected demand for services in 2022 compared to 2021 as compared to the Professional, Scientific & Technical Services (-26.33%) and Accommodation & Food Services (-28.57%) industry sectors.

- The Construction (13.00%), Finance & Insurance (11.83%) and Manufacturing (10.0%) industry sectors reported a significantly higher income for 2022 compared to 2021 as compared to the Accommodation & Food Services (-26.29%) and Professional, Scientific & Technical Services (-26.33%) industry sectors.
Please estimate the percentage of clients/customers/beneficiaries who will either no longer be served or will receive reduced/incomplete service as a result of the coronavirus pandemic related funding shortages and volunteer support lost in 2021.

The average percentage of clients/customers/beneficiaries that will no longer be serviced or received reduced/incomplete services is 21.9%. Responses ranged from -99% to +100% among the 366 non-profit responses.

Significance testing among respondent demographic groups was performed and is fully presented in Appendix A. However, no statistically significant findings were found.

If your organization faces permanent closure related to the coronavirus pandemic, when do you project that permanent closure to occur?

Nearly 98% of the 366 non-profit respondents reported their organization was not facing permanent closure. However, two respondents indicated permanent closure would occur in Q2 of 2022, one respondent reported Q4 of 2022, and five reporting 2023 or later.

Significance testing among respondent demographic groups was performed and is fully presented in Appendix A. However, no statistically significant findings were found.

What is your organization’s projected budget shortfall to meet expenses through June 30, 2022?

Among the 317 reporting non-profit respondents, the average projected budget shortfall to meet expenses through June 30, 2022 was $120,814.71, and ranged from $0 to $10,000,000.

Significance testing among respondent demographic groups was performed and is fully presented in Appendix A. The following statistically significant differences by industry sector are highlighted.

- The Educational Services ($455,083.33) and Health Care and Social Assistance ($245,103.31) industry sectors reported a significantly higher budget shortfall to meet expenses through June 30, 2022 as compared to the Other Services ($14,959.15) industry sector.
**Appendix – Significant Difference Statements**

Statistical procedures such as crosstabs, independent t-tests and ANOVA were performed on the data set to identify significant differences between various segments. The following statements identify statistically significant differences by industry sector, employee size, revenue, county type (metro vs. non-metro).

**By Industry Sector**

**Q2 At the present time, were the effects of current economic conditions created due to the lasting impacts of the coronavirus pandemic directly impacting your organization?**

Respondents in the Other Services (25.9%) industry were significantly more likely to report no direct impact compared to respondents from the Arts, Entertainment, and Recreation (17.9%), Educational Services (17.6%), and Health Care and Social Assistance (11.1%) industries.

**Q5 Which of the following were your organization’s top 3 concerns with respect to current economic conditions created due to the lasting impacts of the coronavirus pandemic?**

Respondents in the Arts, Entertainment, and Recreation industry (41.0%) were significantly more likely to report cash flow as one of their top 3 concerns compared to respondents from the Educational services (17.6%), Health Care and Social Assistance (27.3%), and Other Services (30.9%) industries.

Respondents in the Arts, Entertainment, and Recreation industry (38.5%) and Other Services (38.3%) industries were significantly more likely to report decreasing consumer confidence as one of their top 3 concerns compared to respondents from the Educational services (11.8%), and Health Care and Social Assistance (7.1%) industries.

Respondents in the Educational Services (49.0%) and Health Care and Social Assistance industries (51.5%) were significantly more likely to report employee health/well-being as one of their top 3 concerns compared to respondents in Arts, Entertainment, and Recreation (20.5%), and Other Services (19.8%) industries.

Respondents in the Arts, Entertainment, and Recreation (64.1%) industry were significantly more likely to report revenue loss as one of their top 3 concerns compared to respondents from the Educational Services (29.4%), Health Care and Social Assistance (39.4%), and Other Services (42.0%) industries.

Respondents in the Health Care and Social Assistance (81.8%) industry were significantly more likely to report workforce availability as one of their top 3 concerns as compared to respondents from the Arts, Entertainment, and Recreation (33.3%), Educational Services (66.7%), and Other Services (32.1%) industries.

Respondents in the Health Care and Social Assistance (19.2%) industry were significantly more likely to report workforce reduction as one of their top 3 concerns as compared to respondents in the Arts, Entertainment, and Recreation (5.1%), Educational Services (3.9%), and Other Services (6.2%) industries.
Q6 How challenging has it been for your organization to address your Top 3 concerns?

Respondents in the Other Services (36.0%) industry were significantly more likely to report their top 3 concern of cash flow as slightly challenging compared to respondents in the Health Care and Social Assistance (8.3%), Educational services (0.0%), and The Arts, Entertainment, and Recreation (6.3%) industries.

Respondents in the educational services (44.4%) industry were significantly more likely to report their top 3 concern of cash flow as moderately challenging compared to respondents in the Health Care and Social Assistance (22.2%), and Other Services (28.0%) industries.

Respondents in the Health Care and Social Assistance (37.0%) industry were significantly more likely to report their top 3 concern of cash flow as very challenging compared to respondents in the Arts, Entertainment and Recreation (18.8%), Educational services (22.2%), and Other Services (24.0%) industries.

Q7 In the last 6 months, has your organization done any of the following?

Respondents in the Arts, Entertainment & Recreation (15.4%) industry were significantly more likely to report temporarily closing their business in the last 6 months as compared to respondents in the Educational Services (3.9%), and Health Care and Social Assistance (5.1%) industries.

Q8 In the next 6 months, do you think your organization will need to do any of the following?

Respondents in the Arts, Entertainment & Recreation (28.2%), and Health Care and Social Assistance (29.3%) industries was significantly more likely to report needing to obtain financial assistance or additional capital in the next 6 months as compared to respondents in the Educational Services (15.7%), and Other services (11.1%) industries.

Respondents in the Arts, Entertainment & Recreation (37.2%) industry were significantly more likely to report needing to increase or pivot marketing or sales efforts in the next 6 months as compared to respondents in the Educational Services (23.5%), Health Care and Social Assistance (22.2%), and Other Services (12.3%) industries.

Respondents in the Health Care and Social Assistance (31.3%) industry were significantly more likely to report needing to adjust their business model in the next 6 months as compared to respondents in the Other Services (12.3) industry.

Respondents in the Health Care and Social Assistance (25.3%) industry were significantly more likely to report needing to learn how to better provide for the safety of customers and employees in the next 6 months as compared to respondents in the Arts, Entertainment & Recreation (11.5%), Educational Services (13.7%), and Other Services (7.4%) industries.

Respondents in the Health Care and Social Assistance (69.7%) and Educational services (66.7%) industries were significantly more likely to report needing to identify and hire new employees in the next 6 months as compared to the Arts, Entertainment & Recreation (32.1%), and Other Services (30.9%) industry.
Respondents in the Health Care and Social Assistance (49.5%) industry were significantly more likely to report needing to offer new/additional training for employees in the next 6 months as compared to respondents in the Arts, Entertainment & Recreation (14.1%), Educational Services (33.3%), and Other Services (12.3%) industries.

Respondents in the Health Care and Social Assistance (35.4%) industry were significantly more likely to report needing to evaluate work arrangements or employees in the next 6 months as compared to respondents in the Arts, Entertainment & Recreation (21.8%), Educational Services (29.4%), and Other Services (13.6%) industries.

Q9 Please indicate whether your organization is currently doing, considering, or not considering each of the following.

Respondents in the Health Care and Social Assistance (24.2%) industry were significantly more likely to report currently creating or revising their supply chain strategy as compared to respondents in the Arts, Entertainment & Recreation (14.1%), Educational Services (7.8%), and Other Services (14.8%) industries.

Respondents in the Arts, Entertainment and Recreation (26.9%) industry were significantly more likely to report considering, creating, or revising their supply chain strategy as compared to respondents in Health Care and Social Assistance (19.2%), and Other Services (11.1%) industries.

Respondents in the Health Care and Social Assistance (11.1%) industry were significantly more likely to report currently investing more in work automation as compared to respondents in the Arts, Entertainment & Recreation (5.1%), Educational Services (2.0%), and Other Services (3.7%) industries.

Respondents in the Health Care and Social Assistance (12.1%), and Other Services (11.1%) industries were significantly more likely to report considering investing more in work automation as compared to respondents in the Arts, Entertainment & Recreation (6.4%), Educational Services (2.0%), and Other Services (3.7%) industries.

Respondents in the Health Care and Social Assistance (28.3%), and Arts, Entertainment and Recreation (28.2%) industries were significantly more likely to report not considering investing more in work automation as compared to respondents in the Educational Services (23.5%), and Other Services (16.0%) industries.

Respondents in the Health Care and Social Assistance (22.2%) industry were significantly more likely to report currently utilizing contractors/contract services to segment workforce needs compared to respondents in the Educational Services (7.8%), Arts, Entertainment and Recreation (12.8%), and Other Services (12.3%) industries.

Respondents in the Health Care and Social Assistance (17.2%) industry were significantly more likely to report considering utilizing contractors/contract services to segment workforce needs compared to respondents in the Educational Services (11.8%), Arts, Entertainment and Recreation (10.3%), and Other Services (13.6%) industries.

Respondents in the Educational Services (51.0%) industry were significantly more likely to report being not applicable to utilize contractors/contract services to segment workforce needs compared to respondents in the Health Care and Social Assistance (25.3%) industries.
Q10A [If Yes] What types of investments have you made/will you be making?

Respondents in the Educational Services (85.7%), Health Care and Social Assistance (66.7%), and Other Services (60.0%) industries were significantly more likely to report investing in Cybersecurity as compared to respondents in the Arts, Entertainment & Recreation (0.0%) industries.

Q12 Please estimate what percentage of your organization’s employees were eligible to work remotely in February 2022 compared to what percentage worked remotely in February 2022

Respondents in the Other Services (55.05%) industry were significantly more likely to report a higher increase in employees eligible to work remotely in February 2022, compared to respondents in the Arts, Entertainment and Recreation (39.85), Educational Services (39.92%), and Health Care and Social Assistance (25.88%) industries.

Respondents in the Arts, Entertainment and Recreation (39.85%), and Educational Services (39.92%) industries were significantly more likely to report a higher increase in employees eligible to work remotely in February 2022 compared to respondents in the Health Care and Social Assistance (25.88%) industry.

Q13 How has your company been impacted by remote work options that were becoming more prevalent in the U.S. economy?

Respondents in the Health Care and Social Assistance (12.1%) and Other Services (8.6%) industries were significantly more positively impacted by remote work options as compared to respondents in the Arts, Entertainment and Recreation (2.6%), and Educational Services (3.9%) industries.

Respondents in the Health Care and Social Assistance (10.1%) industry were significantly more negatively impacted by remote work options as compared to respondents in the Arts, Entertainment and Recreation (5.1%), and Other Services (2.5%) industries.

Respondents in the Educational Services (29.4%) industry were significantly more positively and negatively impacted by remote work options as compared to respondents in the Arts, Entertainment and Recreation (12.8%) industry.

Respondents in the Other Services (38.3%) industry were significantly more likely to report no impact from remote work options as compared to respondents in the Educational Services (25.5%), and Health Care and Social Assistance (24.2%) industries.

Q14: How difficult is it for your organization to attract new talent compared to before March 2020

Respondents in the Health Care and Social Assistance (-3.15) industry were significantly more likely to report a higher decrease in difficulty attracting new talent compared to respondents in the Other Services (-1.53) industry.

Q15: Is your organization utilizing any of the following measures to respond to a shortage of qualified applicants? (Select all that apply)

Respondents in the Health Care and Social Assistance (53.5%) industry were significantly more likely to report hiring less experienced workers and providing additional training as compared to respondents in
the Arts, Entertainment & Recreation (26.9%), Educational Services (43.1%), and Other Services (17.3%) industries.

Respondents in the Health Care and Social Assistance (45.6%) industry were significantly more likely to report hiring non-traditional workers as compared to respondents in the Arts, Entertainment & Recreation (9.0%), Educational Services (31.4%), and Other Services (9.9%) industries.

Respondents in the Health Care and Social Assistance (60.6%) industry were significantly more likely to report expanding recruiting methods as compared to respondents in the Arts, Entertainment & Recreation (24.4%), Educational Services (45.1%), and Other Services (30.9%) industries.

Respondents in the Health Care and Social Assistance (40.4%) industry were significantly more likely to report offering referral bonuses to current employees as compared to respondents in the Arts, Entertainment & Recreation (2.6%), Educational Services (13.7%), and Other Services (2.5%) industries.

Respondents in the Health Care and Social Assistance (29.3%) industry were significantly more likely to report offering additional/enhanced benefits to current employees as compared to respondents in the Arts, Entertainment & Recreation (6.4%), Educational Services (21.6%), and Other Services (11.1%) industries.

Respondents in the Health Care and Social Assistance (30.3%) industry were significantly more likely to report offering above market compensation packages to current employees as compared to respondents in the Arts, Entertainment & Recreation (10.3%), Educational Services (13.7%), and Other Services (7.4%) industries.

Respondents in the Health Care and Social Assistance (26.3%) industry were significantly more likely to report offering internships/apprenticeships as compared to respondents in the Arts, Entertainment & Recreation (17.9%), Educational Services (17.6%), and Other Services (8.6%) industries.

Respondents in the Health Care and Social Assistance (29.3%) industry were significantly more likely to report offering signing bonuses as compared to respondents in the Arts, Entertainment & Recreation (1.3%), and Other Services (3.7%) industries.

Respondents in the Health Care and Social Assistance (26.3%) industry were significantly more likely to report hiring contractors as compared to respondents in the Arts, Entertainment & Recreation (11.5%), Educational Services (9.8%), and Other Services (8.6%) industries.

Respondents in the Other Services (45.7%) industry were significantly more likely to report doing none of these as compared to respondents in the Educational Services (15.7%), and Health Care and Social Assistance (11.1%) industries.

Q16 Which of the following do you think could help your organization be more successful recruiting and retaining new talent?

Respondents in the Health Care and Social Assistance (54.5%) and Educational Services (51.0%) industries were significantly more likely to consider offering better benefits as being successful as compared to respondents in the Arts, Entertainment and Recreation (25.6%), and Other Services (37.0%) industries.
Respondents in the Health Care and Social Assistance (24.2%) industry were significantly more likely to consider offering better promotion of training/Career development opportunities as being successful as compared to respondents in the Arts, Entertainment and Recreation (11.5%), Educational Services (13.7%), and Other Services (6.2%) industries.

Respondents in the Health Care and Social Assistance (80.8%) and Educational Services (70.6%) industries were significantly more likely to consider offering higher starting wages as being successful as compared to respondents in the Arts, Entertainment & Recreation (50.0%), and Other Services (51.9%) industries.

Respondents in the Health Care and Social Assistance (33.3%) and Educational Services (31.4%) industries were significantly more likely to consider more outreach to colleges/universities as being successful as compared to respondents in the Arts, Entertainment & Recreation (23.1%), and Other Services (8.6%) industries.

Respondents in the Health Care and Social Assistance (34.3%) and Educational Services (23.5%) industries were significantly more likely to consider more flexible schedules as being successful as compared to respondents in the Arts, Entertainment & Recreation (9.0%), and Other Services (22.2%) industries.

Respondents in the Health Care and Social Assistance (8.1%) industry were significantly more likely to consider providing ESL courses as being successful as compared respondents in to Arts, Entertainment & Recreation (2.6%), Educational Services (2.0%), and Other Services (0.0%) industries.

Respondents in the Health Care and Social Assistance (39.4%) industry were significantly more likely to consider partnering with local high schools, trade schools, an/or community college students to inform students about their industry as compared to respondents in the Arts, Entertainment & Recreation (17.9%), Educational Services as being successful (23.5%), and Other Services (11.1%) industries.

Respondents in the Health Care and Social Assistance (35.4%) and Educational Services (25.5%) industries were significantly more likely to consider offering tuition reimbursement as being successful as compared to respondents in the Arts, Entertainment & Recreation (5.1%) and Other Services (12.3%) industries.

Q17 What areas of assistance would be most helpful to your organization?

Respondents in the Educational Services (37.3%) and Health Care and Social Assistance (32.3%) industries were significantly more likely to report Child Care support for families within their top 3 areas of assistance as compared to respondents in the Arts, Entertainment & Recreation (6.4%) and Other Services (21.0%) industries.

Respondents in the Arts, Entertainment & Recreation (41.0%) and Health Care and Social Assistance (51.5%) industries were significantly more likely to report financial assistance within their top 3 areas of assistance as compared to respondents in the Educational Services (35.3%), and Other Services (28.4%) industries.

Respondents in the Arts, Entertainment & Recreation (52.6%) industry was significantly more likely to report marketing/promotion within their top 3 areas of assistance as compared to respondents in the
Educational Services (25.5%), Health Care and Social Assistance (15.2%) and Other Services (27.2%) industries.

Respondents in the Educational Services (21.6%) and Health Care and Social Assistance (23.2%) industries were significantly more likely to report modification of licensing and government regulations within their top 3 areas of assistance as compared to respondents in the Arts, Entertainment & Recreation (2.6%) and Other Services (3.7%) industries.

Respondents in the Arts, Entertainment & Recreation (66.7%) and Other Services (58.0%) industries were significantly more likely to report providing support to the non-profit sector within their top 3 areas of assistance as compared to respondents in the Educational Services (31.4%) and Health Care and Social Assistance (48.5%) industries.

Respondents in the Health Care and Social Assistance (20.2%) industry was significantly more likely to report workforce training/development within their top 3 areas of assistance as compared to respondents in the Educational Services (5.9%), Other Services (6.2%), and Arts, Entertainment & Recreation (1.3%) industries.

Respondents in the Manufacturing (52.0%) and Public Administration (45.0%) industries were significantly more likely to report efforts to attract new population/workers to the community within their top 3 areas of assistance as compared to respondents in the Retail Trade (25.4%), Other Services (25.0%) and Arts, Entertainment & Recreation (23.2%) industries.

**Q20 If [Yes, not applicable/Not sure] Which of the following describe the nature of your organization’s planned business travel for 2022? (Select all that apply)**

Respondents in the Health Care and Social Assistance (34.0%), and Other Services (41.2%) industry were significantly more likely to have travel planned for external meetings as compared to the Arts, Entertainment & Recreation (7.1%), and Educational Services (17.2%) industry.

Respondents in the Other Services (23.5%) industry were significantly more likely to have travel planned for sales/business development as compared to the Educational Services (6.9%), Health Care and Social Assistance (5.7%) and Arts, Entertainment & Recreation (7.1%) industry.

Respondents in the Other Services (84.3%) industry were significantly more likely to have travel planned for conferences as compared to the Educational Services (55.2%), Health Care and Social Assistance (62.3%) and Arts, Entertainment & Recreation (47.6%) industry.

**Q21 Which of the following best describes your organization’s gross sales in 2021 compared to the previous year?**

Respondents in the Arts, Entertainment and Recreation (28.2%) industry were significantly more likely to report gross sales in 2021 as somewhat increasing compared to the previous year as compared to respondents in the Other Services (19.8%), Educational Services (11.8%) and Health Care and Social Assistance (10.1%) industries.

Respondents in the Arts, Entertainment and Recreation (24.4%) industry were significantly more likely to report gross sales in 2021 as significantly declining compared to the previous year as compared to
respondents in the Other Services (4.9%), Educational Services (3.9%) and Health Care and Social Assistance (13.1%) industries.

Q26 Please use the slider below to estimate what percentage describes the current number of volunteers at your organization as compared to 2019 (pre-pandemic) levels.

Respondents in the Educational Services (-24.43%) and Health Care and Social Assistance (-24.43%) industry were significantly more likely to report a higher decrease in volunteers as compared to 2019 compared to respondents in the Other Services (-13.33%) and Arts, Entertainment and Recreation (-9.12%) industries.

By Employee Size

Q4: Which of the following is your organization currently or anticipate experiencing?

Respondents with 6 to 24 employees (56.1%) and 25 or more (67.4%) were significantly more likely to report a shortage of supplies or inputs compared to respondents with 5 or less employees (40.8%).

Respondents with 25 or more employees (26.9%) were significantly more likely to report a shortage of supplies or inputs compared to respondents with 6 to 24 employees (56.1%).

Respondents with 5 or less employees (47.4%) were significantly more likely to report some other supply disruption compared to respondents with 6 to 24 employees (31.7%), and 25 or more employees (24.7%).

Q5: Which of the following were your organization’s top 3 concerns with respect to current economic conditions created due to the lasting impacts of the coronavirus pandemic?

Respondents with 5 or less employees (40.4%) were significantly more likely to report having cash flow as one of their top 3 concerns compared to respondents with 6 to 24 employees (30.4%) and 25 or more employees (18.0%).

Respondents with 6 to 24 employees (30.4%) were significantly more likely to report having cash flow as one of their top 3 concerns compared to respondents with 25 or more employees (18.0%).

Respondents with 5 or less employees (34.6%) were significantly more likely to report having decreasing consumer confidence as one of their top 3 concerns compared to respondents with 6 to 24 employees (25.2%) and 25 or more employees (10.8%).

Respondents with 25 or more employees (52.3%) were significantly more likely to report having employee health as one of their top 3 concerns compared to respondents with 6 to 24 employees (28.7%) and 5 or less employees (22.1%).

Respondents with 25 or more employees (80.2%) were significantly more likely to report having workforce availability as one of their top 3 concerns compared to respondents with 6 to 24 employees (53.0%) and 5 or less employees (32.4%).

Respondents with 5 or less employees (15.4%) were significantly more likely to report having something else as one of their top 3 concerns compared to respondents with 25 or more employees (3.6%).
Q7: In the last 6 months, has your organization done any of the following?

Respondents with 25 or more employees (25.2%) were significantly more likely to report that they have identified new supply chain options compared to respondents with 5 or less employees (11.0%).

Respondents with 6 to 24 employees (32.2%) were significantly more likely to report that they have increased prices due to inflation compared to respondents with 5 or less employees (18.4%) and 25 or more employees (22.5%).

Respondents with 25 or more employees (67.6%) were significantly more likely to report that they have identified and hired new employees compared to respondents with 5 or less employees (21.3%) and 6 to 24 employees (42.6%).

Respondents with 25 or more employees (45.9%) were significantly more likely to report that they have offered new/additional training for employees compared to respondents with 5 or less employees (12.5%) and 6 to 24 employees (32.2%).

Respondents with 25 or more employees (54.1%) were significantly more likely to report that they have evaluated work arrangements for employees compared to respondents with 5 or less employees (31.6%) and 6 to 24 employees (35.7%).

Respondents with 5 or less employees (12.5%) were significantly more likely to report that they have temporarily closed their business compared to respondents with 25 or more employees (2.7%) and 6 to 24 employees (5.2%).

Q8: In the next 6 months, do you think your organization will need to do any of the following?

Respondents with 25 or more employees (30.6%), and 6 to 24 employees (22.6%) were significantly more likely to report that they will have to identify new supply chain options compared to respondents with 5 or less employees (12.5%).

Respondents with 25 or more employees (30.6%) were significantly more likely to report that they will have to identify new supply chain options compared to respondents with 6 to 24 employees (12.5%).

Respondents with 5 or less employees (16.2%) were significantly more likely to report that they will have to develop online sales or websites compared to respondents with 6 to 24 employees (5.2%) and 25 or more employees (2.7%).

Respondents with 6 to 24 employees (38.3%) were significantly more likely to report that they will have to develop online sales or websites compared to respondents with 5 or less employees (23.5%) and 25 or more employees (20.7%).

Respondents with 25 or more employees (23.4%) were significantly more likely to report that they will have to learn how to better provide for the safety of their customers and employees compared to respondents with 5 or less employees (10.3%) and 6 to 24 employees (8.7%).

Respondents with 25 or more employees (78.4%) were significantly more likely to report that they will have to identify and hire new employees compared to respondents with 5 or less employees (25.7%) and 6 to 24 employees (50.4%).
Respondents with 6 to 24 employees (50.4%) were significantly more likely to report that they will have to identify and hire new employees compared to respondents with 5 or less employees (25.7%).

Respondents with 25 or more employees (49.5%) were significantly more likely to report that they will have to offer additional training for employees compared to respondents with 5 or less employees (13.2%) and 6 to 24 employees (24.3%).

Respondents with 25 or more employees (39.6%) were significantly more likely to report that they will have to evaluate work arrangements for employees compared to respondents with 5 or less employees (13.2%) and 6 to 24 employees (23.5%).

Q9: Please indicate whether your organization is currently doing, considering, or not considering each of the following.

Respondents with 25 or more employees (23.4%) were significantly more likely to report that they were currently creating or revising their supply chain strategy compared to respondents with 5 or less employees (15.4%) and 6 to 24 employees (16.5%).

Respondents with 25 or more employees (25.2%) and 6 to 24 employees (23.5%) were significantly more likely to report that they were considering creating or revising their supply chain strategy compared to respondents with 5 or less employees (13.2%).

Respondents with 5 or less employees (44.9%) were significantly more likely to report that they were not able to create or revise their supply chain strategy compared to respondents with 25 or more employees (29.7%) and 6 to 24 employees (33.0%).

Respondents with 25 or more employees (65.8%) were significantly more likely to report that they were currently relying more heavily on communications services for their business operations compared to respondents with 6 to 24 employees (44.3%), and 5 or less employees (50.7%).

Respondents with 6 to 24 employees (20.0%) were significantly more likely to report that they were not considering creating or revising their supply chain strategy compared to respondents with 25 or more employees (10.8%).

Respondents with 6 to 24 employees (27.8%) were significantly more likely to report that they were not considering creating or revising their supply chain strategy compared to respondents with 25 or more employees (15.3%).

Respondents with 25 or more employees (27.0%) were significantly more likely to report that they were currently utilizing contractors/contract services to segment workforce needs compared to respondents with 5 or less employees (11.8%) and 6 to 24 employees (11.3%).

Respondents with 25 or more employees (18.9%) and 6 to 24 employees (17.4%) were significantly more likely to report that they were considering utilizing contractors/contract services to segment workforce needs compared to respondents with 5 or less employees (8.1%).

Respondents with 5 or less employees (51.5%) were significantly more likely to report that they were not able to utilize contractors/contract services to segment workforce needs compared to respondents with 25 or more employees (21.6%) and 6 to 24 employees (38.3%).
Q10: Do you plan on making capital expenditures in Industry 4.0 technologies or applications focused on interconnectivity, automation and real-time data in 2022

Respondents with 25 or more employees (18.0%) were significantly more likely to report having already made capital expenditures in industry 4.0 compared to respondents with 5 or less employees (2.2%) and 6 to 24 employees (7.0%).

Respondents with 25 or more employees (8.1%) were significantly more likely to report having plans to make capital expenditures in industry 4.0 compared to respondents with 5 or less employees (1.5%) and 6 to 24 employees (1.7%).

Respondents with 5 or less employees (90.4%) were significantly more likely to report having no plans to make capital expenditures in industry 4.0 compared to respondents with 25 or more employees (56.8%) and 6 to 24 employees (84.3%).

Respondents with 25 or more employees (17.1%) were significantly more likely to report not being sure about their plans to make capital expenditures in industry 4.0 compared to respondents with 5 or less employees (5.9%) and 6 to 24 employees (7.0%).

Q11A: Do you expect this percentage to decrease, remain the same, or increase in the next six months?

Respondents with 5 or less employees (72.8%) were significantly more likely to report that workplace footprint has remained the same compared to respondents with 25 or more employees (65.8%) and 6 to 24 employees (65.2%).

Respondents with 5 or less employees (72.8%) were significantly more likely to report that they were not sure about their workplace footprint change compared to respondents with 25 or more employees (12.6%).

Q12: Please use the sliders below to estimate what percentage of your organization’s employees were eligible to work remotely in February 2022 compared to what percentage worked remotely in February 2022.

Respondents with 5 or less employees (59.1) were significantly more likely to report a higher change in employees eligible to work remotely in February 2022 as compared to respondents with 6 to 24 employees (31.07) and 25 or more employees (23.74).

Respondents with 5 or less employees (33.12) were significantly more likely to report a higher percentage of employees that worked remotely in February 2022 as compared to respondents with 25 or more employees (16.12).

Q13: How has your company been impacted by remote work options that were becoming more prevalent in the U.S. economy?

Respondents with 25 or more employees (32.4%) were significantly more likely to report both positive and negative impact from remote work compared to respondents with 5 or less employees (19.9%) and 6 to 24 employees (14.8%).
Respondents with 5 or less employees (31.6%) and 6 to 24 employees (34.8%) were significantly more likely to report that they were not applicable to answer this question compared to respondents with 25 or more employees (15.3).

**Q14: How difficult is it for your organization to attract new talent compared to before March 2020?**

Respondents with 25 or more employees (-3.0) were significantly more likely to report a higher difficulty in attracting new talent as compared to before March 2020 compared to respondents with 6 to 24 employees (-2.24), and 5 or less employees (-1.53).

Respondents with 6 to 24 employees (-2.24) were significantly more likely to report a higher difficulty in attracting new talent as compared to before March 2020 compared to respondents with 5 or less employees (-1.53).

**Q15: Is your organization utilizing any of the following measures to respond to a shortage of qualified applicants?**

Respondents with 25 or more employees (57.7%) were significantly more likely to report hiring less experienced workers and providing additional training compared to respondents with 5 or less employees (16.2%) and 6 to 24 employees (36.5).

Respondents with 25 or more employees (27.0%) were significantly more likely to report hiring non-traditional workers compared to respondents with 5 or less employees (7.4%) and 6 to 24 employees (19.1%).

Respondents with 25 or more employees (64.0%) were significantly more likely to report expanding recruiting methods compared to respondents with 5 or less employees (14.0%) and 6 to 24 employees (49.6%).

Respondents with 25 or more employees (35.1%) were significantly more likely to report offering referral bonuses to current employees compared to respondents with 5 or less employees (1.5%) and 6 to 24 employees (10.4%).

Respondents with 25 or more employees (27.0%) were significantly more likely to report offering additional/enhanced benefits compared to respondents with 5 or less employees (11.0%) and 6 to 24 employees (19.1%).

Respondents with 25 or more employees (24.3%) were significantly more likely to report offering above market compensation packages compared to respondents with 5 or less employees (11.0%) and 6 to 24 employees (13.0%).

Respondents with 25 or more employees (24.3%) were significantly more likely to report offering internships/apprenticeships compared to respondents with 5 or less employees (11.8%) and 6 to 24 employees (16.5%).

Respondents with 25 or more employees (31.5%) were significantly more likely to report offering signing bonuses compared to respondents with 5 or less employees (2.2%) and 6 to 24 employees (9.6%).

Respondents with 25 or more employees (27.9%) were significantly more likely to report hiring contractors compared to respondents with 5 or less employees (7.4%) and 6 to 24 employees (12.2%).
Respondents with 25 or more employees (8.1%) were significantly more likely to report investing in automation instead of hiring compared to respondents with 5 or less employees (1.5%) and 6 to 24 employees (2.6%).

Respondents with 5 or less employees (52.9%) were significantly more likely to report doing none of these compared to respondents with 25 or more employees (9.0%) and 6 to 24 employees (19.1%).

**Q16: Which of the following do you think could help your organization be more successful recruiting and retaining new talent?**

Respondents with 25 or more employees (25.2%) were significantly more likely to report better promotion of training/Career development opportunities as being successful compared to respondents with 5 or less employees (12.5%) and 6 to 24 employees (11.3%).

Respondents with 25 or more employees (73.9%) and 6 to 24 employees (70.4%) were significantly more likely to report higher starting wages as being successful compared to respondents with 5 or less employees (50.7%).

Respondents with 25 or more employees (36.0%) were significantly more likely to report more outreach to colleges/universities as being successful compared to respondents with 5 or less employees (14.7%) and 6 to 24 employees (20.9%).

Respondents with 25 or more employees (42.3%) were significantly more likely to report more flexible schedules as being successful compared to respondents with 5 or less employees (19.1%) and 6 to 24 employees (16.5%).

Respondents with 25 or more employees (15.3%) were significantly more likely to report offering on-the-job/paying for training as being successful compared to respondents with 5 or less employees (5.1%) and 6 to 24 employees (2.6%).

Respondents with 25 or more employees (7.2%) were significantly more likely to report providing ESL courses as being successful compared to respondents with 5 or less employees (2.2%) and 6 to 24 employees (0.0%).

Respondents with 25 or more employees (35.1%) were significantly more likely to report partnering with local high schools, trade schools, and/or community college students to inform students about their industry as being successful compared to respondents with 5 or less employees (16.2%) and 6 to 24 employees (22.6%).

Respondents with 25 or more employees (36.9%) were significantly more likely to report offering tuition reimbursement as being successful compared to respondents with 5 or less employees (8.8%) and 6 to 24 employees (12.2%).

Respondents with 5 or less employees (22.8%) were significantly more likely to report offering none of these as being successful compared to respondents with 25 or more employees (3.6%) and 6 to 24 employees (4.3%).
Q17: What areas of assistance would be most helpful to your organization?

Respondents with 25 or more employees (41.4%) were significantly more likely to report that childCare
support for families would be most helpful to their organization compared to respondents with 5 or less
employees (18.4%) and 6 to 24 employees (16.5%).

Respondents with 25 or more employees (19.8%) were significantly more likely to report that
modification of licensing and government regulations would be most helpful to their organization
compared to respondents with 5 or less employees (5.9%) and 6 to 24 employees (10.4%).

Respondents with 5 or less employees (64.0%) were significantly more likely to report that providing
support to non-profit sector would be most helpful to their organization compared to respondents with
25 or more employees (31.5%) and 6 to 24 employees (48.7%).

Respondents with 6 to 24 employees (12.2%) were significantly more likely to report that
supplies/services for their operation would be most helpful to their organization compared to
respondents with 25 or more employees (4.5%) and 5 or less employees (4.4%).

Respondents with 25 or more employees (18.9%) were significantly more likely to report that workforce
training/development would be most helpful to their organization compared to respondents with 5 or
less employees (6.6%) and 6 to 24 employees (7.8%).

Respondents with 25 or more employees (47.7%) were significantly more likely to report that efforts to
attract new population/workers to community would be most helpful to their organization compared to
respondents with 5 or less employees (22.8%) and 6 to 24 employees (29.6%).

Q26: Please estimate what percentage describes the current number of volunteers at your
organization as compared to 2019 (pre-pandemic) levels.

Respondents with 25 or more employees (-24.18) were significantly more likely to report a higher
decrease in volunteers as compared to 2019 compared to respondents with 5 or less employees (-10.74).
By Organization Revenue

Q4: As a result of the coronavirus pandemic, which of the following is your organization currently experiencing?

Respondents with annual sales of $250K to $999.9K (56.0%), $1M to $9.9M (66.7%), and $10M or more (70.8%) were significantly more likely to report a shortage of supplies or inputs as compared to respondents with annual sales of $250K or less (42.1%).

Respondents with annual sales of $250K to $999.9K were significantly more likely to report delivery delays due to supply constraints (54.0%) as compared to respondents with annual sales of $250K and less (27.6%), $1M to $9.9M (43.9%), and $10M or more (45.8%).

Q5: Which of the following were your organization’s top 3 concerns with respect to the effects of the coronavirus pandemic?

Respondents with annual sales of $250K and less (40.5%) were significantly more likely to report having cash flow as one of their top 3 concerns compared to respondents with annual sales of $250K to $999.9K (28.9%), $1M to $9.9M (20.5%), and $10M or more (17.2%).

Respondents with annual sales of $250K and less (38.2%) were significantly more likely to report having decreasing consumer confidence/spending as one of their top 3 concerns compared to respondents with annual sales of $250K to $999.9K (25.0%), $1M to $9.9M (19.2%), and $10M or more (3.4%).

Respondents with annual sales of $10M or more (58.6%) were significantly more likely to report having employee health/well being as one of their top 3 concerns compared to respondents with annual sales of $250K to $999.9K (26.3%), $1M to $9.9M (38.4%), and less than $250K (19.8%).

Respondents with annual sales of $250K to $999.9K (57.9%), $1M to $9.9M (67.1%), and $10M or more (72.4%) were significantly more likely to report having workforce availability as one of their top 3 concerns compared to respondents with annual sales of $250K and less (30.5%).

Q7: In the last 6 months, has your organization done any of the following?

Respondents with annual sales of less than $250K (26.1%), $250K to $999.9K (28.9%), and $1M to $9.9M (31.5%) were significantly more likely to report needing to identify new supply chain options in the last 6 months compared to respondents with annual sales of $10M or more (3.4%).

Respondents with annual sales of $1M to $9.9M (31.5%) were significantly more likely to report needing to increase prices due to inflation in the last 6 months compared to respondents with annual sales of less than $250K (22.9%), and $10M or more (3.4%).

Respondents with annual sales of $250K to $999.9K (36.8%), $1M to $9.9M (65.8%), and $10M or more (69.0%) were significantly more likely to report needing to identify and hire new employees in the last 6 months compared to respondents with annual sales of less than $250K (20.6%).

Respondents with annual sales of $10M or more (51.7%) were significantly more likely to report needing to offer new/additional training for employees in the last 6 months compared to respondents with annual sales of $250K and less (17.6%), $250K to $999.9K (25.0%), and $1M to $9.9M (39.7%).
Respondents with annual sales of $10M or more (65.5%) were significantly more likely to report needing to evaluate work arrangements for employees in the last 6 months compared to respondents with annual sales of $250K and less (29.8%), $250K to $999.9K (38.2%), and $1M to $9.9M (49.3%).

Q8: In the next 6 months, do you think your organization will need to do any of the following?

Respondents with annual sales of $1M to $9.9M (32.9%), and $10M or more (37.9%) were significantly more likely to report needing to identify new supply chain options in the next 6 months compared to respondents with annual sales of $250K or less (14.5%).

Respondents with annual sales of $250K to $999.9K (47.4%), $1M to $9.9M (69.9%), and $10M or more (75.9%) were significantly more likely to report needing to identify and hire new employees in the next 6 months compared to respondents with annual sales of $250K or less (23.7%).

Respondents with annual sales of $10M or more (55.5%) were significantly more likely to report needing to offer new/additional training for employees in the next 6 months compared to respondents with annual sales of $250K or less (14.5%), $250K to $999.9K (18.4%), and $1M to $9.9M (42.5%).

Respondents with annual sales of $10M or more (48.3%) were significantly more likely to report needing to evaluate work arrangements for employees in the next 6 months compared to respondents with annual sales of $250K or less (13.7%), $250K to $999.9K (21.1%), and $1M to $9.9M (37.0%).

Q9: Please indicate whether your organization is currently doing, considering, or not considering each of the following.

Respondents with annual sales of $250K to $999.9K (47.4%), and $1M to $9M (38.4%) were significantly more likely to report currently increasing cash reserves compared to respondents with annual sales of $250K or less (29.8%), and $10M or more (27.6%).

Respondents with annual sales of $250K or less (20.6%), and $10M or more (24.1%) were significantly more likely to report considering increasing cash reserves compared to respondents with annual sales of $1M to $9.9M (15.1%), and $250K to $999.9K (13.2%).

Respondents with annual sales of $1M to $9.9M (37.0%) were significantly more likely to report not considering increasing cash reserves compared to respondents with annual sales of $250K to $999.9K (27.6%), and $10M or more (17.2%).

Respondents with annual sales of $10M or more (31.0%) were significantly more likely to report not being applicable to increase cash reserves as compared to respondents with annual sales of $250K or less (17.6%), $250K to $999.9K (11.8%), and $1M to $9.9M (9.6%).

Respondents with annual sales of $10M or more (75.9%) were significantly more likely to report currently relying more heavily on communications services for their business operations as compared to respondents with annual sales of $250K or less (40.5%), $250K to $999.9K (52.6%), and $1M to $9.9M (63.0%).

Respondents with annual sales of $250K and less (13.7%) were significantly more likely to report considering relying more heavily on communications services for their business operations as compared to respondents with annual sales of $250K to $999.9K (5.3%).
Respondents with annual sales of $250K and less (20.6%) were significantly more likely to report not considering relying more heavily on communications services for their business operations as compared to respondents with annual sales of $10M or more (10.3%).

Respondents with annual sales of $250K and less (25.2%) were significantly more likely to report being not applicable to rely more heavily on communications services for their business operations as compared to respondents with annual sales of $1M to $9.9M (13.7%), and $10M or more (6.9%).

Respondents with annual sales of $10M or more (58.6%) were significantly more likely to report currently expanding their organization through digital means and related technologies as compared to respondents with annual sales of $250K or less (29.0%), $250K to $999.9K (32.9%), and $1M to $9.9M (37.0%).

Respondents with annual sales of $1M to $9.9M (26.0%) were significantly more likely to report considering expanding their organization through digital means and related technologies as compared to respondents with annual sales of $250K to $999.9K (14.5%).

Respondents with annual sales of $250K and less (21.1%) were significantly more likely to report not considering expanding their organization through digital means and related technologies as compared to respondents with annual sales of $10M or more (10.3%).

Respondents with annual sales of $250K to $999.9K (31.6%) were significantly more likely to report being not applicable to expand their organization through digital means and related technologies as compared to respondents with annual sales of $250K and less (25.2%), $1M to $9.9M (19.2%), and $10M or more (6.9%).

Respondents with annual sales of $10M or more (24.1%) were significantly more likely to report currently utilizing contractors to segment workforce needs as compared to respondents with annual sales of $250K or less (10.7%), $250K to $999.9K (9.2%), and $1M to $9.9M (20.5%).

Respondents with annual sales of $10M or more (24.1%) were significantly more likely to report considering utilizing contractors to segment workforce needs as compared to respondents with annual sales of $250K or less (4.6%).

Respondents with annual sales of $1M to $9.9M (38.4%) were significantly more likely to report not considering utilizing contractors to segment workforce needs as compared to respondents with annual sales of $250K to $999.9K (30.3%).

Respondents with annual sales of $250K and less (51.9%) were significantly more likely to report being not applicable to utilize contractors to segment workforce needs as compared to respondents with annual sales of $250K to $999.9K (38.2%), $1M to $9.9M (17.8%), and $10M or more (17.2%).

Q10: Do you plan on making capital expenditures in Industry 4.0 technologies or applications focused on interconnectivity, automation and real-time data in 2022?

Respondents with annual sales of $10M or more (34.5%) were significantly more likely to report having already made capital expenditures in industry 4.0 compared to respondents with annual sales of $250K and less (2.3%), $250K to $999.9K (7.9%), and $1M to $9.9M (8.2%).
Respondents with annual sales of $10M or more (13.8%) were significantly more likely to report having plans to make capital expenditures in industry 4.0 compared to respondents with annual sales of $250K and less (0.0%).

Q10A: What types of investments have you made/will be making?

Respondents with annual sales of $250K to $999.9K (87.5%) were significantly more likely to report investing in cloud computing systems compared to respondents with annual sales of $250K and less (66.7%), $1M to $9.9M (40.0%), and $10M or more (7.1%).

Q11A Do you expect this percentage to decrease, remain the same, or increase in the next six months?

Respondents with annual sales of $10M or more (10.3%) were significantly more likely to report workplace footprint has decreased compared to respondents with annual sales of $250K or less (1.5%), and $1M to $9.9M (1.4%).

Respondents with annual sales of $10M or more (27.6%) were significantly more likely to report workplace footprint has increased compared to respondents with annual sales of $250K or less (10.7%), and $250K to $999.9K (6.6%).

Respondents with annual sales of $250K and less (21.4%) were significantly more likely to report that they were unsure about workplace footprint change compared to respondents with annual sales of $10M or more (0.0%).

Respondents with annual sales of $250K to $999.9K (69.7%) were significantly more likely to report that workplace occupancy remained the same compared to respondents with annual sales of $10M or more (55.2%).

Respondents with annual sales of $10M or more (37.9%) were significantly more likely to report workplace occupancy has increased compared to respondents with annual sales of $250K or less (12.2%), $250K to $999.9K (9.2%), and $1M to $9.9M (23.3%).

Respondents with annual sales of $250K and less (20.6%) were significantly more likely to report being unsure about workplace occupancy change compared to respondents with annual sales of $10M or more (6.9%).

Respondents with annual sales of $250K and less (-59.77) and $250K to $999.9K (-55.89) were significantly more likely to report a higher current workplace footprint compared to respondents with annual sales of $10M or more (-22.96).

Q12: Please estimate what percentage of your organization's employees were eligible to work remotely in February 2022 compared to what percentage worked remotely in February 2022.

Respondents with annual sales of $10M or more (13.8%) were significantly more likely to report a decrease in eligibility to work remotely compared to respondents with annual sales of $250K or less (3.8%), and $250K to $999.9K (6.6%).
Respondents with annual sales of $10M or more (10.3%) were significantly more likely to report an increase in eligibility to work remotely compared to respondents with annual sales of $250K or less (3.8%).

Respondents with annual sales of $250K or less (22.1%) were significantly more likely to report that they were unsure about remote work changes compared to respondents with annual sales of $250K to $999.9K (5.3%), $1M to $9.9M (2.7%), and $10M or more (3.4%).

Q12A Do you expect this percentage to decrease, remain the same, or increase in the next six months?

Respondents with annual sales of $1M to $9.9K (16.4%) were significantly more likely to report that remote work has remained the same compared to respondents with annual sales of $250K or less (8.4%).

Respondents with annual sales of $250K to $999.9K (76.3%) were significantly more likely to report that remote work has remained the same compared to respondents with annual sales of $250K or less (63.4%).

Respondents with annual sales of $10M or more (13.8%) were significantly more likely to report an increase in working remotely compared to respondents with annual sales of $250K or less (3.8%), and $250K to $999.9K (3.9%).

Respondents with annual sales of $250K or less (24.4%) were significantly more likely to report that they were unsure about remote work changes compared to respondents with annual sales of $250K to $999.9K (6.6%), $1M to $9.9M (4.1%), and $10M or more (3.4%).

Q13 How has your company been impacted by remote work options that were becoming more prevalent in the U.S. economy?

Respondents with annual sales of $10M or more (17.2%) were significantly more likely to report a positive impact on remote work compared to respondents with annual sales of $250K or less (5.3%), $250K to $999.9K (6.6%), and $1M to $9.9M (9.6%).

Respondents with annual sales of $10M or more (13.8%) were significantly more likely to report a negative impact on remote work compared to respondents with annual sales of $250K or less (6.1%), $250K to $999.9K (5.3%), and $1M to $9.9M (5.5%).

Respondents with annual sales of $10M or more (27.6%) and $1M to $9.9M (27.4%) were significantly more likely to report both a negative and positive impact on remote work compared to respondents with annual sales of $250K or less (16.8%), and $250K to $999.9K (18.4%).

Q14: How difficult is it for your organization to attract new talent compared to before March 2020?

Respondents with annual sales of $10M or more (-3.11), and $1M to $9.9M (-2.73) reported a significantly larger decrease in difficulty attracting new talent compared to respondents with annual sales of $250K or less (-1.54).

Q15: Please indicate whether your organization is currently doing, considering, or not considering each of the following?
Respondents with annual sales of $10M or more (69.0%) were significantly more likely to report that they were hiring less experienced workers and providing additional training compared to respondents with annual sales of $250K or less (18.3%), $250K to $999.9K (30.3%), $1M to $9.9M (47.9%),

Respondents with annual sales of $10M or more (69.0%) were significantly more likely to report that they were expanding recruiting methods compared to respondents with annual sales of $250K or less (20.6%), $250K to $999.9K (36.8%), and $1M to $9.9M (61.6).

Respondents with annual sales of $10M or more (34.5%) were significantly more likely to report that they were offering referral bonuses to current employees compared to respondents with annual sales of $250K or less (3.8%), $250K to $999.9K (10.5%), and $1M to $9.9M (23.3%).

Respondents with annual sales of $10M or more (32.9%) and $1M to $9.9M (32.9%) and $10M or more (27.6%) were significantly more likely to report that they were offering additional/enhanced benefits compared to respondents with annual sales of $250K or less (10.7%), and $250K to $999.9K (17.1%).

Respondents with annual sales of $10M or more (34.5%) were significantly more likely to report that they were offering signing bonuses compared to respondents with annual sales of $250K or less (3.1%), $250K to $999.9K (9.2%), and $1M to $9.9M (19.2%).

Respondents with annual sales of $10M or more (31.0%) were significantly more likely to report that they were hiring contractors compared to respondents with annual sales of $250K or less (3.8%), and $250K to $999.9K (11.8%).

Respondents with annual sales of $10M or more (34.5%) were significantly more likely to report that they were investing in automation compared to respondents with annual sales of $250K or less (0.8%), and $250K to $999.9K (0.0%).

Respondents with annual sales of $250K or less (45.0%) were significantly more likely to report that they were investing in none of these compared to respondents with annual sales of $250K to $999.9K (30.3%), $1M to $9.9M (12.3%), and $10M or more (10.3%).

Q16: Which of the following do you think could help your organization be more successful recruiting and retaining new talent?

Respondents with annual sales of $10M or more (31.0%) were significantly more likely to report having better promotion of training/Career development opportunities as being successful compared to respondents with annual sales of $250K or less (12.2%), $250K to $999.9K (3.9%), and $1M to $9.9M (20.5%).

 Respondents with annual sales of $10M or more (82.8%) and $1M to $9.9M (78.1%) were significantly more likely to report offering higher starting wages as being successful compared to respondents with annual sales of $250k or less (48.9%), and $250K to $999.9K (64.5%).

Respondents with annual sales of $10M or more (44.8%) were significantly more likely to report having more outreach to different talent pools as being successful compared to respondents with annual sales of $1M to $9.9M (17.8%), $250K to $999.9K (21.1%) and less than $250K (17.6%).
Respondents with annual sales of $10M or more (44.8%) were significantly more likely to report having more outreach to universities/colleges as being successful compared to respondents with annual sales of $250K or less (17.6%), $250K to $999.9K (23.7%), and $1M to $9.9M (28.8%).

Respondents with annual sales of $10M or more (37.9%) and $1M to $9.9M (37.0%) were significantly more likely to report offering more flexible schedules as being successful compared to respondents with annual sales of $250K or less (13.7%), and $250K to $999.9K (18.4%).

Respondents with annual sales of $10M or more (13.8%) were significantly more likely to report providing ESL courses as being successful compared to respondents with annual sales of $250K or less (2.3%), $250K to $999.9K (0.0%), and $1M to $9.9M (4.1%).

Respondents with annual sales of $10M or more (48.3%) were significantly more likely to report offering tuition reimbursement as being successful compared to respondents with annual sales of $250K or less (6.9%), $250K to $999.9K (9.2%), and $1M to $9.9M (30.1%).

Respondents with annual sales of $250K or less (20.6%) were significantly more likely to report offering none of these as being successful compared to respondents with annual sales of $250K to $999.9K (7.9%), and $1M to $9.9M (5.5%), and $10M or more (3.4%).

Q17: What areas of assistance would be most helpful to your organization?

Respondents with annual sales of $10M or more (62.1%) were significantly more likely to report Child care support for families as being most helpful to their organization compared to respondents with annual sales of $250K or less (13.0%), $250K to $999.9K (11.8%), and $1M to $9.9M (35.6%).

Respondents with annual sales of $10M or more (27.6%) were significantly more likely to report modification of licensing and government regulations as being most helpful to their organization compared to respondents with annual sales of $250K or less (7.6%), and $250K to $999.9K (7.9%).

Respondents with annual sales of $1M to $9.9M (19.2%) were significantly more likely to report workforce training/development as being most helpful to their organization compared to respondents with annual sales of $250K or less (7.6%), and $250K to $999.9K (3.9%).

Respondents with annual sales of $10M or more (48.3%) were significantly more likely to report efforts to attract new population/workers to community as being most helpful to their organization compared to respondents with annual sales of $250K or less (20.6%), and $250K to $999.9K (31.6%).

Q19: Does your organization have any business travel planned for 2022? (Select all that apply)

Respondents with annual sales of $10M or more (65.5%) were significantly more likely to report traveling domestically in 2022 compared to respondents with annual sales of $250K or less (29.8%), $250K to $999.9K (36.8%), and $1M to $9.9M (45.2%).

Q20: Which of the following describe the nature of your organization’s planned business travel for 2021?

Respondents with annual sales of $10M or more (55.0%) were significantly more likely to report that they have external company meetings planned for 2022 compared to respondents with annual sales of $250K or less (21.4%), $250K to $999.9K (27.3%), and $1M to $9.9M (39.1%).
Respondents with annual sales of $10M or more (100.0%) were significantly more likely to report that they have conferences planned for 2022 compared to respondents with annual sales of 250K or less (61.4%), $250K to $999.9K (61.4%), and $1M to $9.9M (71.7%).

Respondents with annual sales of $250K or less (27.1%) were significantly more likely to report that they have none of these planned for 2022 compared to respondents with annual sales of $250K to $999.9K (20.5%), $1M to $9.9M (15.2%), and $10M or more (0.0%).

**Q23B: Which one of the following ownership types best describes your organization?**

Respondents with annual sales of $10M or more (100.0%) and $1M to $9.9M (100.0%) were significantly more likely to report that their organization is none of these compared to respondents with annual sales of 250K or less (88.5%), and $250K to $999.9K (92.1%).

**Q23C: Which one of the following best describes your organization’s primary industry?**

Respondents with annual sales of $250K or less (34.4%) were significantly more likely to report that their primary industry is arts, entertainment and recreation compared to respondents with annual sales of $250K to $999.9K (21.1%), $1M to $9.9M (15.1%), and $10M or more (0.0%).

Respondents with annual sales of $10M or more (27.6%) were significantly more likely to report that their primary industry is educational services compared to respondents with annual sales of $250K or less (7.6%), $250K to $999.9K (5.3%), and $1M to $9.9M (12.3%).

Respondents with annual sales of $250K to $999.9K (30.3%) were significantly more likely to report that their primary industry is other services compared to respondents with annual sales of $10M or more (13.8%), and $1M to $9.9M (11.0%).

**Q25: Please estimate what percentage describes the current/projected income and demand for services in 2022 as compared to 2021 levels.**

Respondents with annual sales of $250K to $999.9K (8.18) were significantly more likely to report a higher increase in demand for services as compared to 2020 levels compared to respondents with annual sales of $250K and less (-10.73).

Respondents with annual sales of $250K to $999.9K (-4.96) and $1M to $9.9M (-5.55) were significantly more likely to report a higher increase in income as compared to 2020 levels compared to respondents with annual sales of Less than $250K (-23.15).

**Q26: Please estimate what percentage describes the current number of volunteers at your organization as compared to 2019 (pre-pandemic) levels.**

Respondents with annual sales of $1M to $9.9M (-20.70) were significantly more likely to report a higher decrease in volunteers as compared to 2019 compared to respondents with annual sales of Less than $250K (-6.77%).
Q31 The State of Iowa would like to have a better first-hand understanding of the current and potential future impact of the coronavirus pandemic on revenue and workforce for Iowa businesses and organizations in 2021 in comparison to 2020.

Respondents with annual sales of less than $250K (-23.75%) were significantly more likely to report a higher decrease in revenue impact for 2021 compared to respondents with annual sales of $1M to $999.9K (-6.1%)

By County Type (Metro vs Non-Metro)

Q7: In the last 6 months, has your organization done any of the following?

Respondents in the Metro counties (47.0%) were significantly more likely to report having evaluated work arrangements for employees in the last 6 months compared to Non-Metro counties (30.6%)

Q8: In the next 6 months, do you think your organization will need to do any of the following?

Respondents in the Non-Metro counties (33.2%) were significantly more likely to report needing to increase prices due to inflation in the next 6 months compared to respondents in the Metro counties (20.4%).

Respondents in the Metro counties (35.9%) were significantly more likely to report needing to increase prices due to inflation in the next 6 months compared to respondents in the Non-Metro counties (18.4%).

Respondents in the Metro counties (31.5%) were significantly more likely to report needing to evaluate work arrangements for employees in the next 6 months compared to respondents in the Non-Metro counties (16.8%).

Q9: Please indicate whether your organization is currently doing, considering, or not considering each of the following.

Respondents in the Metro counties (63.0%) were significantly more likely to report that they were currently relying more heavily on communications services for their business operations compared to Non-Metro Respondents (41.8%).

Respondents in the Non-Metro counties (18.9%) were significantly more likely to report that they were not considering relying more heavily on communications services for their business operations compared to respondents in the Metro counties (12.7%).

Respondents in the Non-Metro counties (30.1%) were significantly more likely to report that they were not applicable to rely more heavily on communications services for their business operations compared to respondents in the Metro counties (14.9%).

Respondents in the Metro counties (40.3%) were significantly more likely to report that they were currently expanding their organization through digital means and related technologies compared to Non-Metro Respondents (27.6%).
Q10A: What types of investments have you made/will be making?
Respondents in Non-Metro counties (13.3%) were significantly more likely to report having made investments in augmented reality/virtual reality compared to respondents in the Metro counties (0.0%).

Q11: Please estimate what percentage increase or decrease of workplace footprint (sq. footage) and workplace occupancy your organization has experienced now compared to before March 2020
Respondents in the Metro counties (74.0%) were significantly more likely to report no change in workplace footprint compared to respondents in the Non-Metro counties (60.7%).
Respondents in the Non-Metro counties (26.0%) were significantly more likely to report that they were not sure about a change in workplace footprint compared to respondents in the Metro counties (9.9%).
Respondents in the Non-Metro Counties (-62.46%) were significantly more likely to report a higher decrease in workplace footprint compared to before March 2020, compared to respondents in the Metro Counties (-42.66%).

12: Please estimate what percentage of your organization's employees were eligible to work remotely in February 2022 compared to what percentage worked remotely in February 2022.
Respondents in the Non-Metro Counties (19.4%) were significantly more likely to report that they were not sure about a change in remote work eligibility compared to respondents in the Metro Counties (7.7%).
Respondents in the Metro Counties (8.8%) were significantly more likely to report an increase in employees working remotely compared to respondents in the Non-Metro Counties (3.1%).
Respondents in the Non-Metro Counties (20.4%) were significantly more likely to report that they were not sure about a change in employees working remotely compared to respondents in the Metro Counties (9.4%).
Respondents in the Metro Counties (42.54%) were significantly more likely to report a higher increase of employees eligible to work remotely in February 2022 compared to respondents in Non-Metro Counties (32.72%).
Respondents in the Metro Counties (27.93%) were significantly more likely to report a higher increase of employees that worked remotely in February 2022 compared to respondents in Non-Metro Counties (17.7%).

Q13: How has your company been impacted by remote work options that were becoming more prevalent in the U.S. economy?
Respondents in Metro counties (9.9%) were significantly more likely to report a positive impact from remote work options as compared to Non-Metro counties (3.1%).
Respondents in Metro counties (25.4%) were significantly more likely to report a both a negative and positive impact from remote work options as compared to Non-Metro counties (17.9%).
Respondents in Non-Metro counties (36.7%) were significantly more likely to report that they were not applicable to answer as compared to Metro counties (20.4%).
Q15: Is your organization utilizing any of the following measure to respond to a shortage of qualified applicants?

Respondents in the Metro counties (21.0%) were significantly more likely to report hiring non-traditional workers as compared to respondents from Non-Metro counties (12.8%).

Respondents in the Metro counties (47.0%) were significantly more likely to report expanding recruiting methods as compared to respondents from Non-Metro counties (32.1%).

Respondents in the Metro counties (22.1%) were significantly more likely to report offering additional/enhanced benefits as compared to respondents from Non-Metro counties (13.8%).

Respondents in the Metro counties (21.0%) were significantly more likely to report offering internships/apprenticeships as compared to respondents from Non-Metro counties (12.8%).

Respondents in the Non-Metro counties (6.1%) were significantly more likely to report being unsure compared to respondents from Metro counties (1.7%).

Q16: Which of the following do you think could help your organization be more successful recruiting and retaining new talent?

Respondents in the Metro counties (67.4%) were significantly more likely to report offering higher starting wages as being successful compared to respondents from Non-Metro counties (56.6%).

Respondents in the Metro counties (29.3%) were significantly more likely to report more outreach to different talent pools as being successful compared to respondents from Non-Metro counties (11.2%).

Respondents in the Metro counties (29.3%) were significantly more likely to report more outreach to colleges/universities as being successful compared to respondents from Non-Metro counties (16.3%).

Respondents in the Metro counties (22.7%) were significantly more likely to report tuition reimbursement as being successful compared to respondents from Non-Metro counties (13.3%).

Respondents in the Non-Metro counties (17.3%) were significantly more likely to report none of these as being successful compared to respondents from Metro counties (8.8%).

Q17 What areas of assistance would be most helpful to your organization?

Respondents in the Metro counties (55.2%) were significantly more likely to report providing support to non-profit sector as a top 3 area of assistance compared to respondents in the Non-Metro counties (43.9%).

Q19: Does your organization have any business travel planned for 2022?

Respondents in the Metro counties (47.0%) were significantly more likely to report traveling domestically as compared to Non-Metro counties (28.1%).

Respondents in the Non-Metro counties (45.4%) were significantly more likely to report not having any travel plans for 2022 as compared to Metro counties (34.8%).
Respondents in the Non-Metro counties (26.0%) were significantly more likely to report not being applicable to answer the question as compared to Metro counties (16.6%).

**Q20 Which of the following describe the nature of your organization’s planned business travel for 2022?**

Respondents in the Metro counties (73.7%) were significantly more likely to report traveling for conferences as compared to Non-Metro counties (53.3%).

Respondents in the Non-Metro counties (35.5%) were significantly more likely to report traveling for none of these as compared to Metro counties (11.9%).

Respondents in the Non-Metro counties (5.6%) were significantly more likely to report not being sure what they were traveling for as compared to Metro counties (0.8%).

Respondents in the Metro counties (12.7%) were significantly more likely to report traveling for some other reason as compared to Non-Metro counties (3.7%).

**Q23B: Can your organization be described as any of the following?**

Respondents in the Metro counties (5.5%) were significantly more likely to report that they were woman owned as compared to respondents in the Non-Metro counties (0.5%).

Respondents in the Non-Metro counties (96.9%) were significantly more likely to report that they were none of these as compared to respondents in the Metro counties (90.6%).

**Q25 Please use the slider below to estimate what percentage describes the current/projected income and demand for services in 2022 as compared to 2021 levels.**

Respondents in the Metro Counties (4.9%) were significantly more likely to report an increase in current/projected demand for services in 2022 as compared to 2021 levels, compared to respondents in Non-Metro Counties (-17.41%).

Respondents in the Non-Metro Counties (-25.51%) were significantly more likely to report a higher current/projected income for services in 2022 as compared to 2021 levels compared to respondents in Metro Counties (-8.16%).

**Q31 The State of Iowa would like to have a better first-hand understanding of the current and potential future impact of the coronavirus pandemic on revenue and workforce for Iowa businesses and organizations in 2021 in comparison to 2020.**

Respondents in the Non-Metro Counties (-11.40%) were significantly more likely to report a higher decrease in employee impact for 2021 compared to respondents in the Metro Counties (-4.68%).