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Re-Entry for Retailers

June 18, 2020

www.DowntownNJ.com

DOWNTOWN

NEW JERSEY

Education

- Technical Assistance
- Quarterly Newsletters
- Quarterly Round Tables
- Webinars & ZOOM Exchanges
- Annual Conference

Advocacy

- Quarterly Policy Watch
- Real Time Policy Advisories
- Legislative Testimony

Recognition

- Annual Awards
- Quarterly Member Spotlights
- Social Media Shares

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Save the Date!

DNJ Virtual Conference –
Friday, October 23rd

Upcoming Forums:

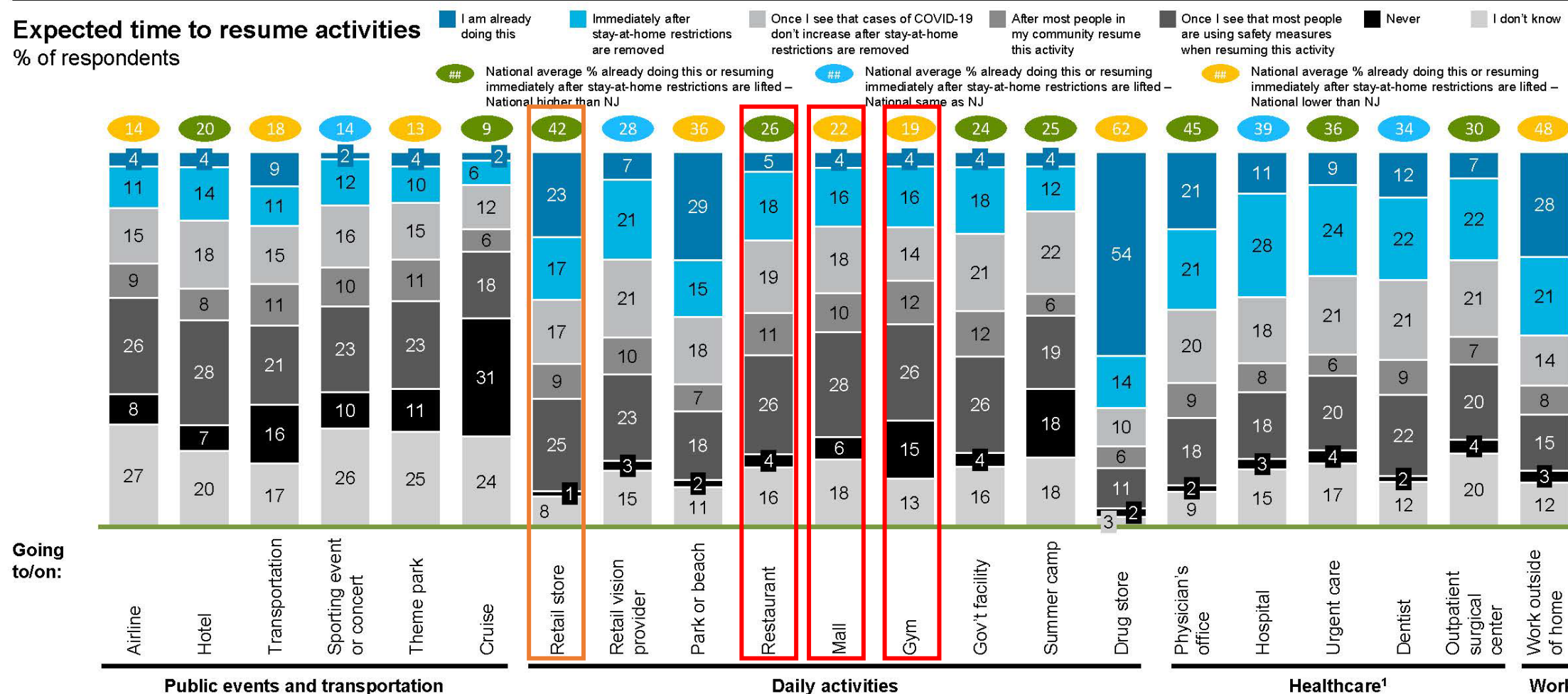
- June 26: Commercial District Recovery w/ Larisa Ortiz of Streetsense
- Send us your suggestions for future forums...
info@downtownnj.com

Past Forums:

- June 12: Digital Resources for Downtowns
- May 29: NJEDA Phase 2 Small Business Assistance Grants
- May 22: Is Your Downtown Ready to Re-Open for Business?
- May 13: Farmers Markets in the New Normal
- May 8: Getting Back to Business Safely
- April 28: Supporting Local Economies Webinar
- April 24: Downtown Budgeting Now
- April 17: What's next for the Retail Real Estate Market?
- April 4: Survival Marketing Workshop
- March 27: State & Federal Relief Programs
- March 20: Downtown Manager Exchange

Overall, NJ residents do not plan to resume most activities even after stay-at-home restrictions are lifted

Expected time to resume activities % of respondents



QRESUME. After stay-at-home restrictions (if any) are removed, please indicate when you would resume each of the following activities: (Respondents with "this activity is not applicable to me" where excluded)

1. If in need of care

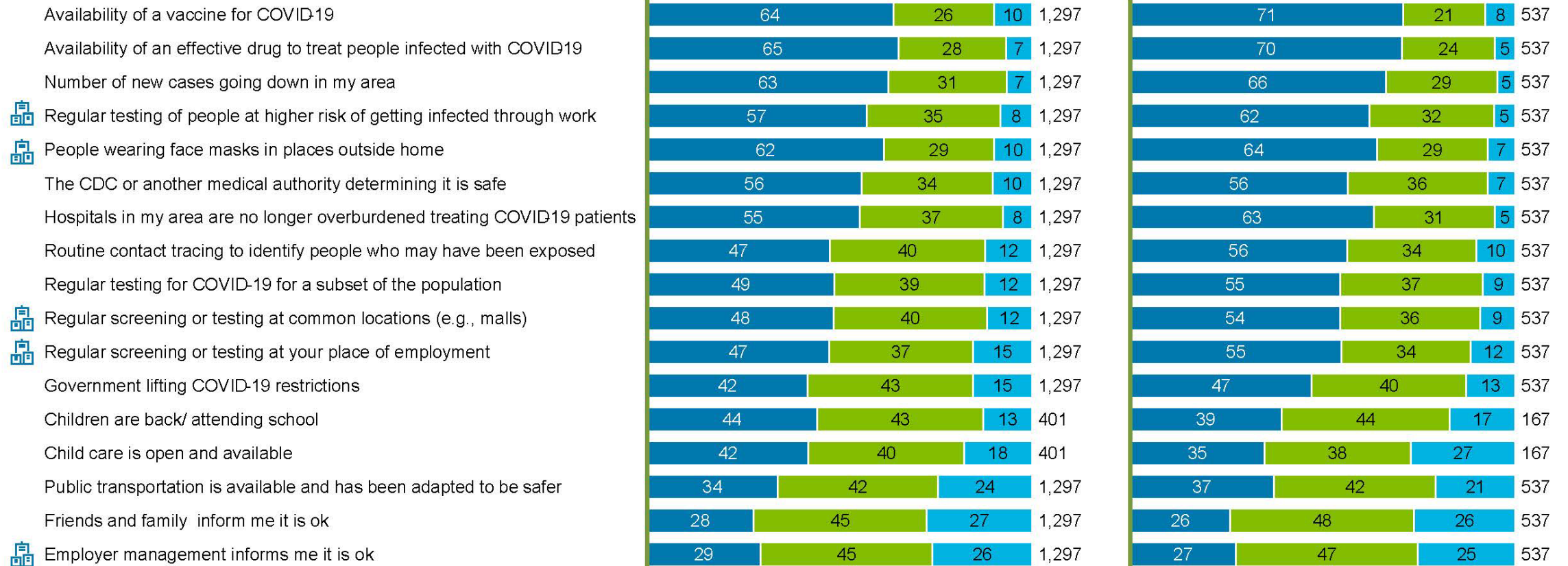
While a vaccine and treatment for COVID were most important to consumers to resume normal activity, they also identified several confidence factors within businesses' control

Respondent importance levels in resuming normal activity based on various factors, % of respondents

Very important Somewhat important Not important
Private sector-influenced activity

National sample

NJ



QFEEL5. Please indicate how important each of the following would be for making you feel comfortable resuming your normal daily activities. (10-point scale from extremely unimportant to extremely important). "Very important" is 8-10, "Somewhat important" is 4-7, and "Not important" is 1-3. | 1 Change in "very important" from 5/18/2020 survey | 2 Question is net new for 6/8/2020

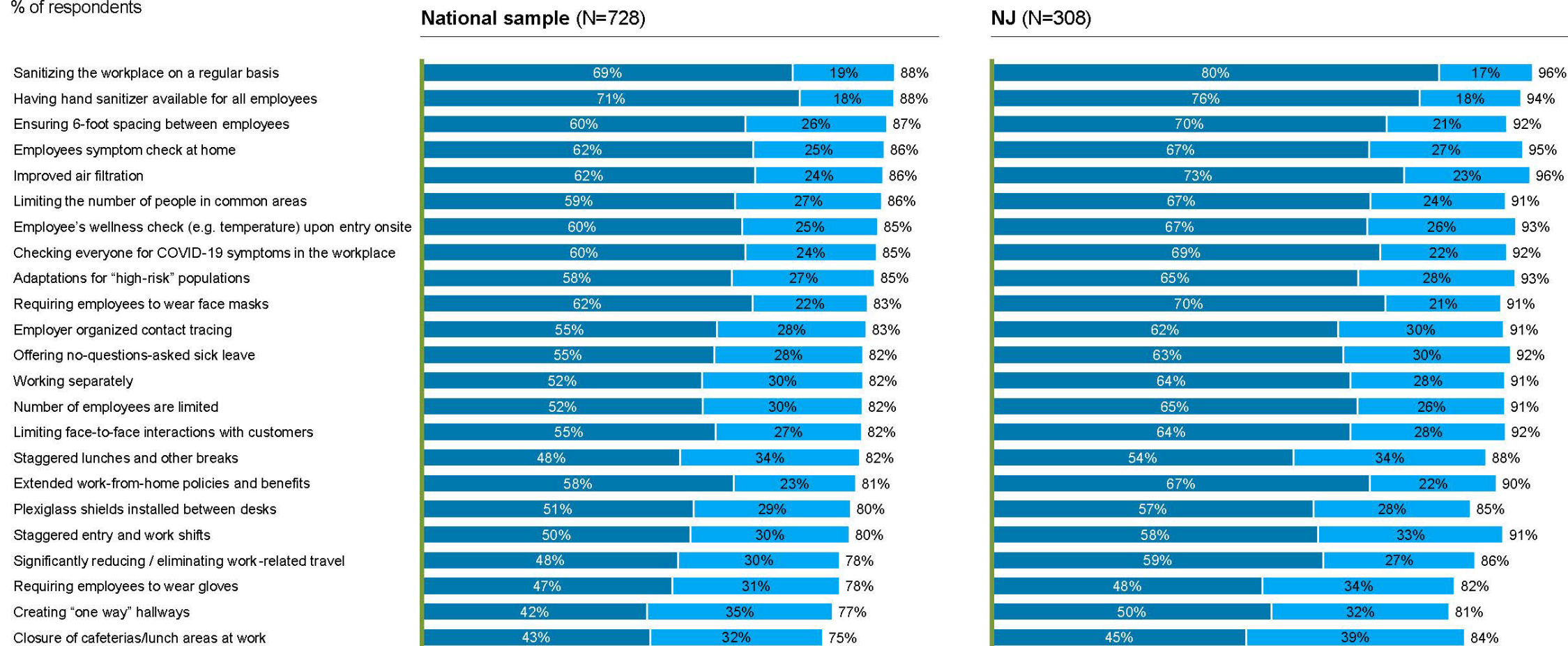
Source: McKinsey COVID-19 Consumer Survey - National (06/08/2020), NJ (06/09/2020), 5/18/2020

NJ residents place a heavier emphasis on promoting safety in the workplace than the national average, and ranked workplace sanitization and air filtration as the most important safeguards

Respondent importance levels of factors to promote comfort and safety in the work environment¹

% of respondents

■ Very important² ■ Somewhat important²



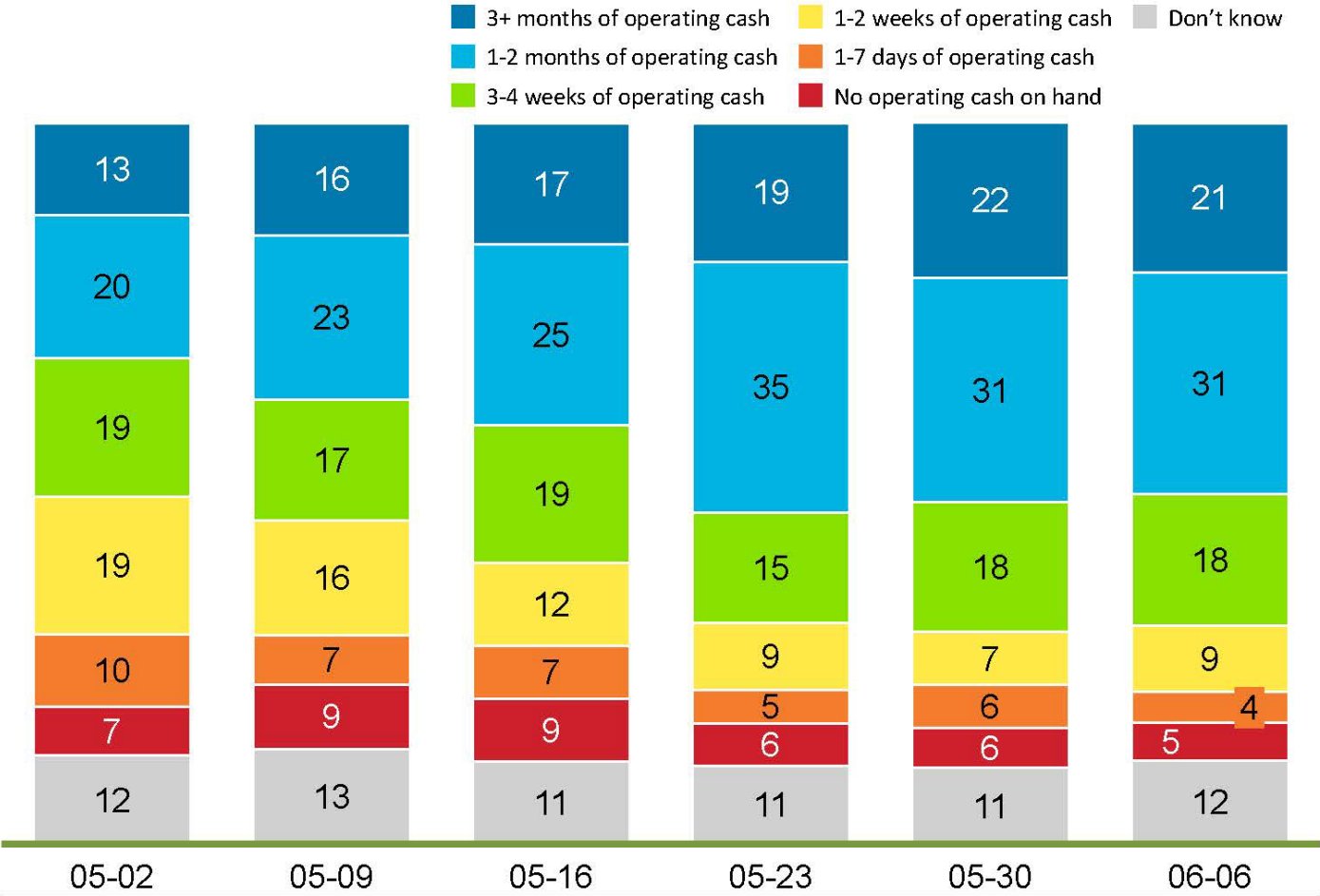
QEMP6. Please indicate how important each of the following would be for you to feel comfortable working at your place of employment.
1. Excludes "Don't Know" and "Not important" responses | 2. "Very important" is 8-10, "Somewhat important" is 4-7, and "Not important" is 1-3

Source: McKinsey COVID-19 Consumer Survey - National (06/08/2020), NJ (06/09/2020)

DRAFT – PREDECISIONAL – DELIBERATIVE – CONSULTATIVE

The number of NJ small businesses with a month or more of operating cash on hand has increased since May

Amount of operating cash on hand for businesses employing <500 people
% of respondents each week, May 2 – June 6



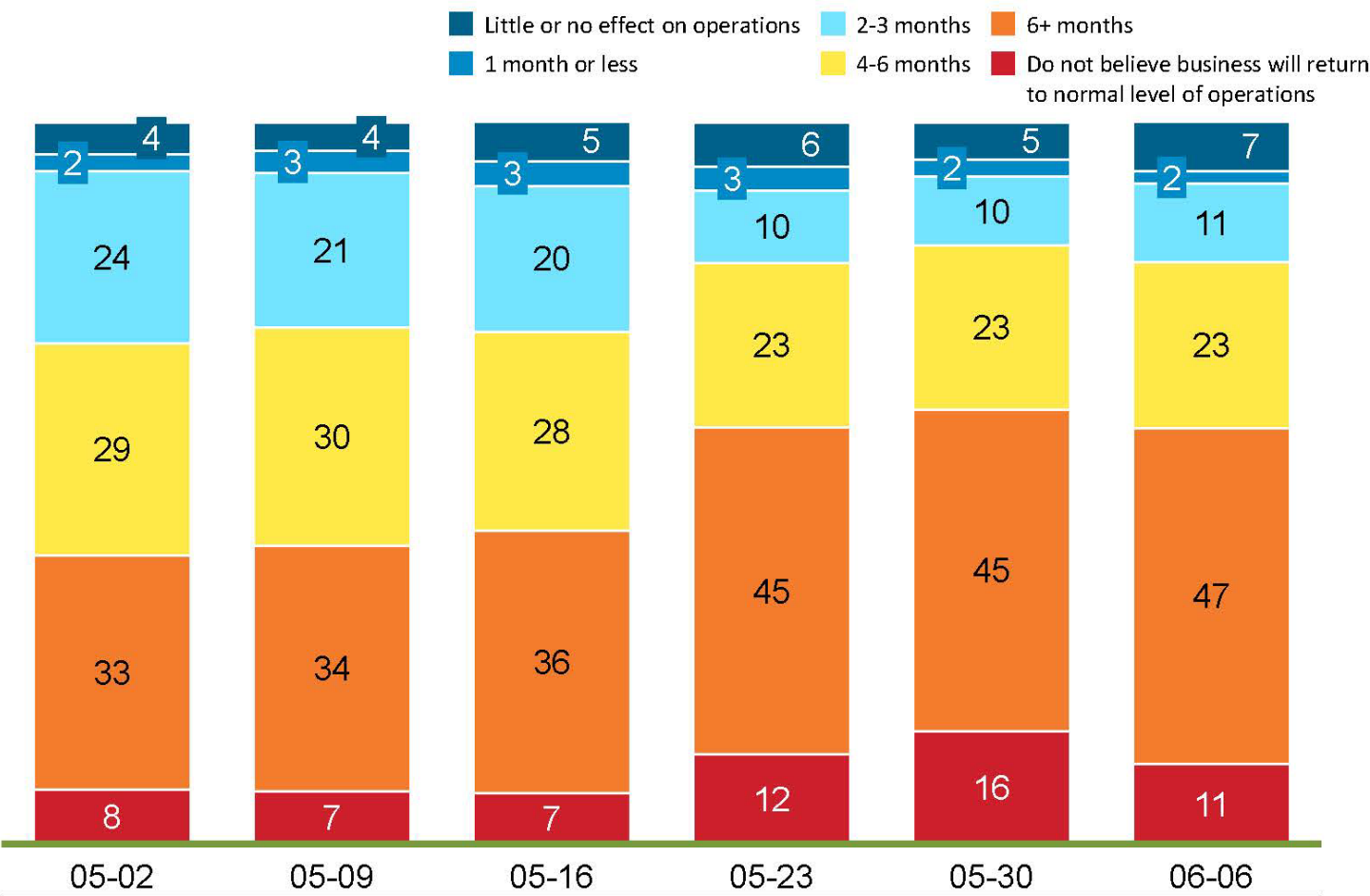
The majority of businesses (51%) have **more than a month's worth** of operating cash on hand – a significant turnaround from early May, when ~1/3 of businesses could sustain themselves for a month or more

The **Paycheck Protection Program (PPP)** may be a significant driver for increased cash availability – 69% of businesses reported receiving PPP funds by June, whereas ~1/4 of businesses had received them in early May

Source: US Census Bureau Small Business Pulse Survey (NJ cut)

Small businesses now believe that the economic impact of COVID will last longer than they anticipated in early May

Estimated time that will pass before business returns to its usual level of operations
% of respondents each week, May 2 – June 6



In early may, **24% of businesses** expected a return to usual business in 2-3 months, compared to **10% of businesses** in early June

~70% of businesses now believe that it will take more than 4 months for business to return to its usual level

Source: US Census Bureau Small Business Pulse Survey (NJ cut)



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RE-ENTRY FOR RETAILERS: RETURNING TO THE STORE

Many are still recovering from the shock of the last few months, with their focus split between safety of family and employees and the real and urgent need to quickly get their business up and running again.

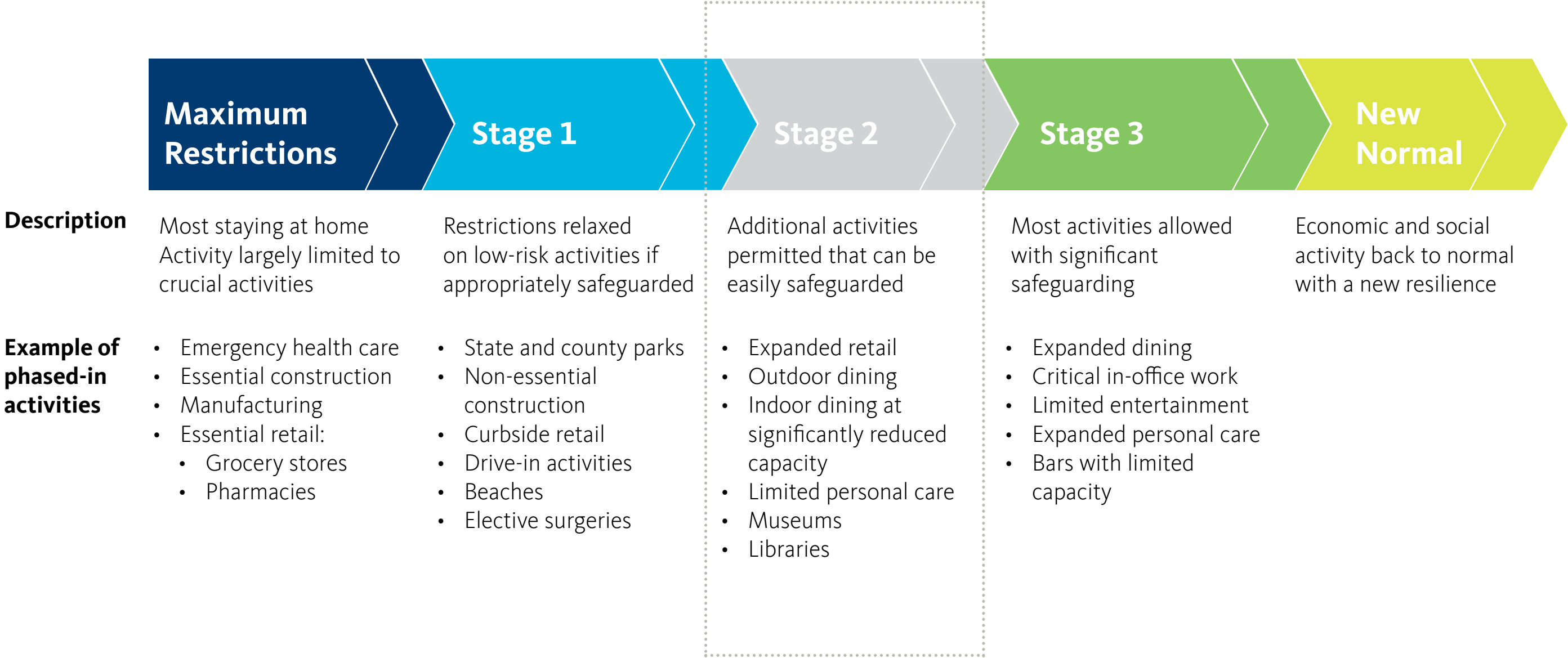


THE CORONAVIRUS HAS TURNED THE WORLD UPSIDE DOWN

The impact of COVID-19 on the global economy has forced organizations in all industries to become more flexible and to evolve, both in real time and over the long term.

SOURCE: [WWW.BBC.COM/NEWS/WORLD-US-CANADA-52094332](https://www.bbc.com/news/world-us-canada-52094332)

THE ROAD BACK: MOVING FORWARD
DELIBERATELY



SOURCE: WWW.NJ.GOV

RETAIL BUSINESSES PERMITTED TO OPERATE MUST FOLLOW THESE GUIDELINES:

- Limit occupancy to 50% of maximum store capacity at one time
- Establish hours of operation specifically for the exclusive use of high-risk individuals
- Install a physical barrier, such as a shield guard, between customers and cashiers/baggers where possible and anywhere you cannot maintain 6 feet of distance
- Provide employees break time for regular hand washing
- Arrange for contactless pay options, pickup, or delivery of goods wherever possible;
- Provide hand sanitizer and wipes to staff and customers;
- Frequently sanitize high-touch areas like restrooms, credit card machines, keypads, counters and shopping carts
- Require infection control practices such as regular hand washing, coughing and sneezing etiquette, and proper tissue usage
- Place conspicuous signage at entrances and throughout the store alerting staff and customers to the required 6 feet of distance
- Mark out 6 feet of spacing in check-out lines for appropriate social distancing
- Require workers and customers to wear cloth face coverings, and require workers to wear gloves

RESTAURANTS, CAFETERIAS, FOOD COURTS, BARS, ETC., THAT ARE STILL PERMITTED TO OPERATE MUST FOLLOW THESE GUIDELINES:

- Limit occupancy to 10% of stated maximum capacity
- Ensure 6 feet of distance between workers and customers (except at the moment of payment or exchange of goods)
- Arrange for contactless pay options, pickup, or delivery wherever possible
- Provide hand sanitizer and wipes to staff and customers
- Frequently sanitize high-touch areas like credit card machines, keypads, and counters
- Require infection control practices such as regular hand washing, coughing and sneezing etiquette, and proper tissue usage
- Place conspicuous signage at entrances and throughout the food business alerting staff and customers to the required 6 feet of distance
- Require workers and customers to wear cloth face coverings, and require workers to wear gloves

A close-up photograph of a human hand, palm facing forward, holding a bright, glowing white ring. The ring is perfectly circular and emits a strong light, creating a high-contrast scene against the dark background. The hand is positioned on the left side of the frame, with fingers slightly spread.

A Time of Change

WHAT NEXT?

**WHAT CAN RETAILERS DO
TO PREPARING FOR FUTURE
RESILIENCE**



SHORT-TERM RESPONSE

GET THE BASICS RIGHT

MINIMIZE PHYSICAL CONTACT POINTS

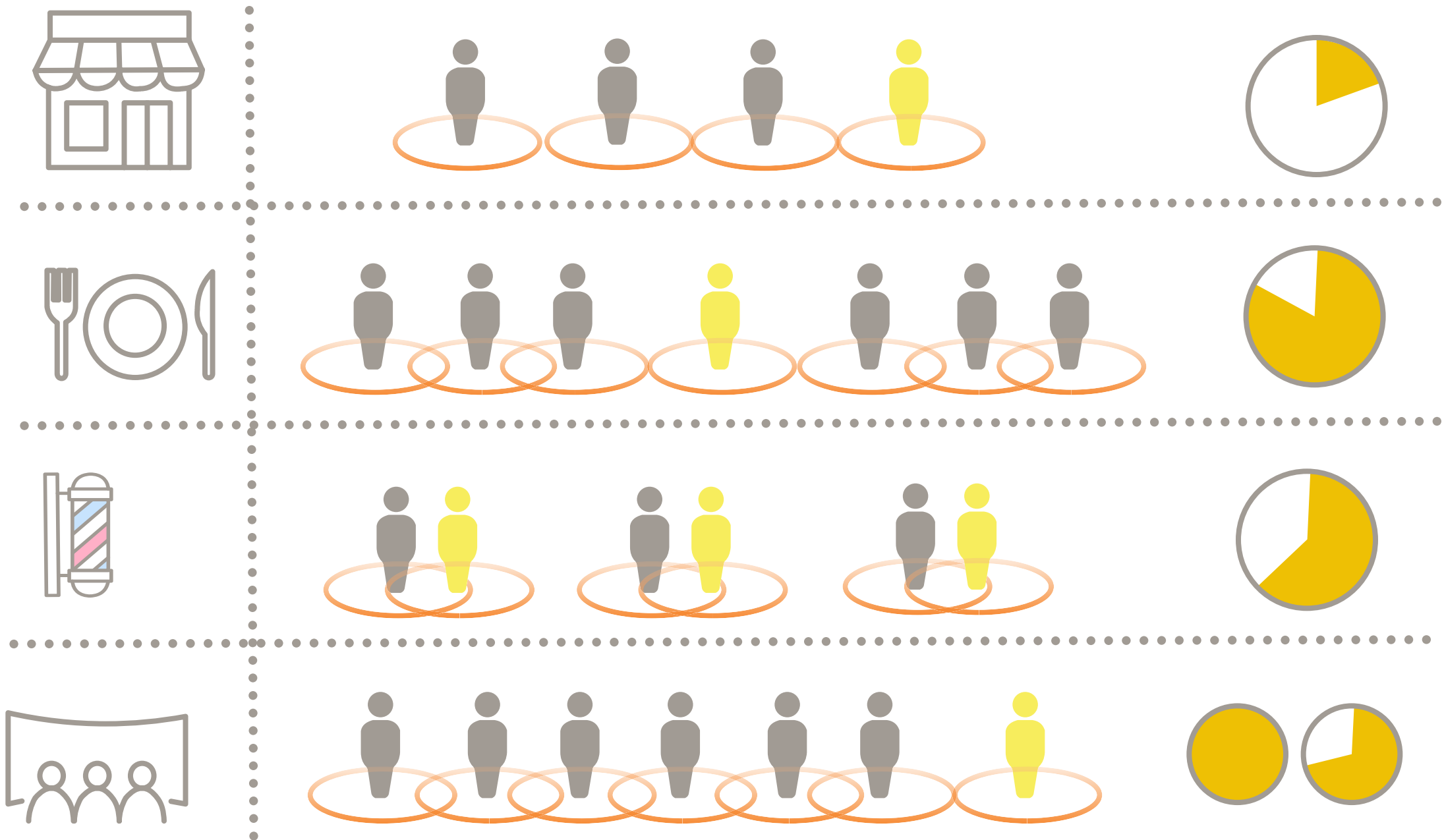
Store designs should consider limiting the number of touchpoints a person has within a space, and clearly messaging navigation and circulation.

DESIGN STRATEGIES

One size does not fit all

Downtown consumer businesses typically have varying proximity needs, dwell times and occupancies.

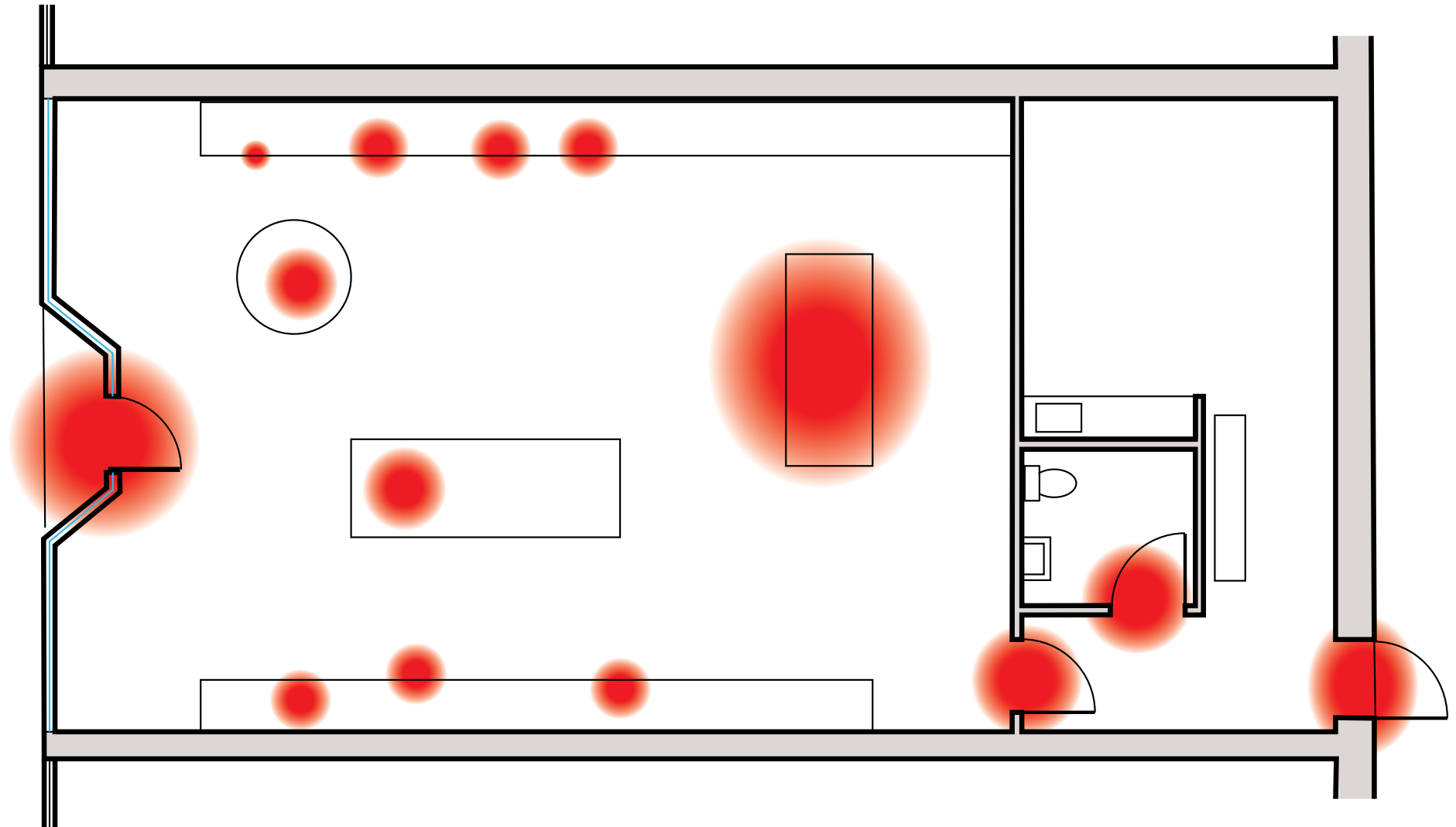
Each business type needs to find a balance of appropriate distance separation, physical separation and extent of PPE that staff need to utilize



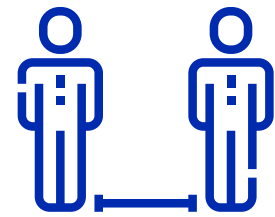
DESIGN STRATEGIES

Identify Touch key touch point 'hot spots' and how to manage them

Consider Store entry doors, cashwraps, merchandise shelving and restroom doors etc. Each space is unique but the goal is to minimize contact, maintain a noticeably clean environment and manage separation



DESIGN STRATEGIES



Deploy Distance Separation

Assign queueing lines at 6' intervals to help customers keep a safe and appropriate distance from one another.



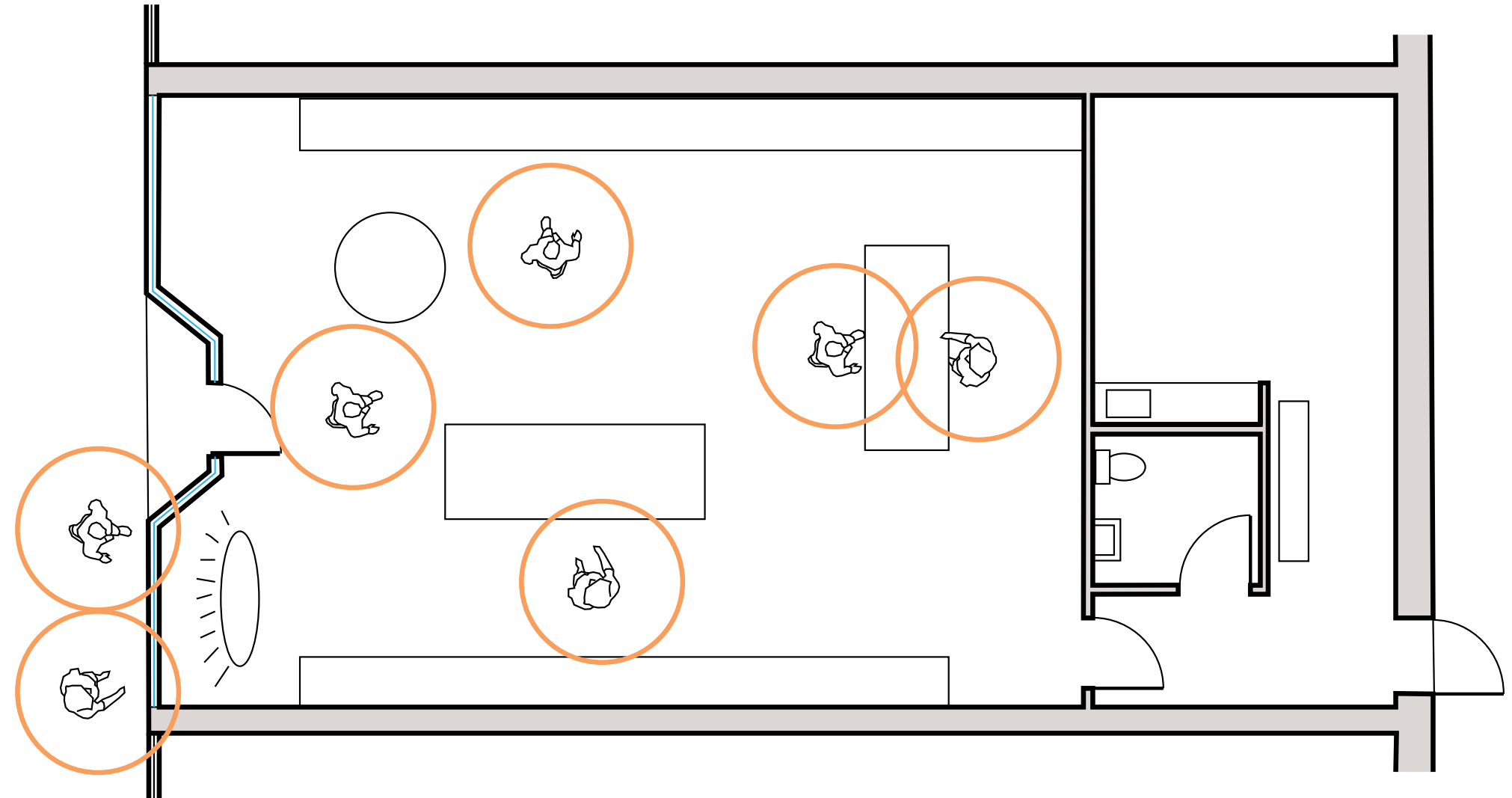
DESIGN STRATEGIES

Regulate occupancy in a practical relationship to the space

The state has mandated a 50% occupancy and 6' separation for retail and 10% occupancy for restaurants.

Consider practicalities of circulation, whether to install screens where separation cannot be maintained.

In some circumstances queueing may be unavoidable leading to longer dwell times at display windows





SHORT-TERM RESPONSE

GET THE BASICS RIGHT

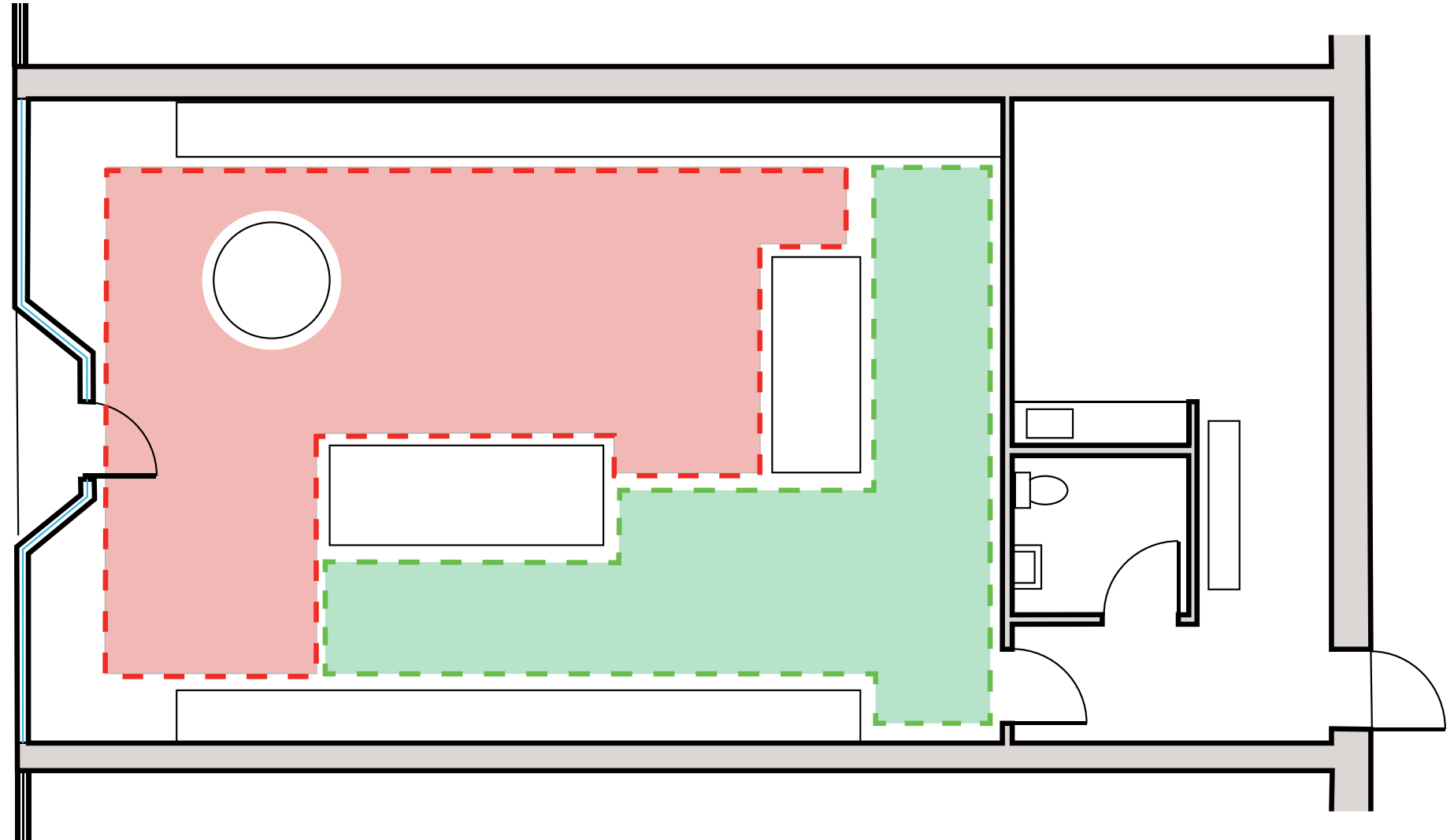
PROTECT YOUR EMPLOYEES & CUSTOMERS

Knowing a business cares deeply about its employees demonstrates that business' value of people, and customers will take note.

DESIGN STRATEGIES

Utilise the existing features/ fixtures

Work with what you have to set up specific customer and employee 'highways' using the fixtures as physical separators where business allows. Train staff to try to use these features to regulate their distance from the customer.



DESIGN STRATEGIES

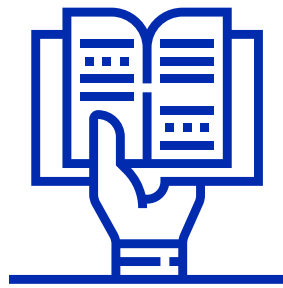


Enable Contactless Transactions

Leverage chip and pin cards or contactless payment systems like Apple Pay, Google Wallet, Wechat, RFID Technology, and even facial recognition



EMERGING DESIGN STRATEGIES

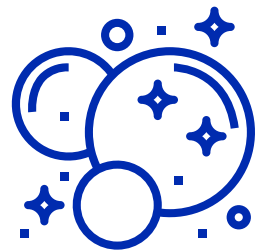


Get Training Right

People are coming back into downtown establishments again - BUT some will have heightened emotions. Empathy and service will be critical at this time and training associates to be supportive of their customer's emotional well-being will determine how a customer remembers their experience with the brand



EMERGING DESIGN STRATEGIES



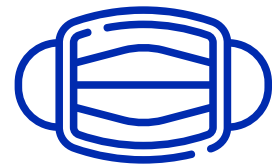
Change Your Cleaning Policy

Develop a training playbook to assign employees cleaning tasks frequently during store hours.

This is a good way to rebuild trust with customers as you show them that you're taking their health seriously.



DESIGN STRATEGIES

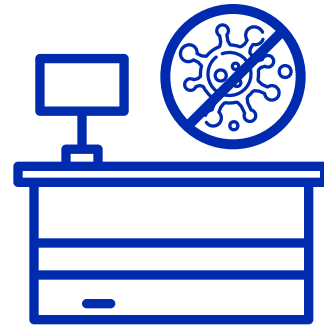


Provide Appropriate Personal Protective Equipment (PPE)

Protect workers by equipping them with sneeze guards, gloves, masks, disinfecting wipes, and hand sanitizer to reduce exposure.



VV-DESIGN STRATEGIES



Introduce Antimicrobial Surfaces

New anti microbial products are coming out daily to help aid in sanitation and materials such as copper are stated to have antimicrobial properties.

Consider floor mats that can help sanitize and disinfect footwear upon entry into a space.





A time of Opportunity

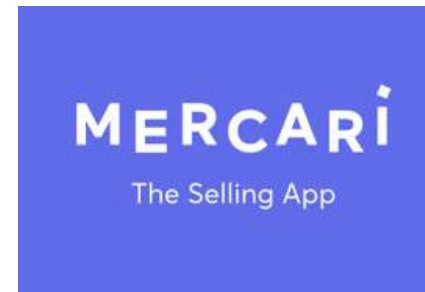
HOW ARE YOU ADAPTING YOUR BUSINESS TO THE NEW NORM?



LONG-TERM RESPONSE

EASE CUSTOMER'S STRESS AND MAXIMIZE THEIR TIME

Stores need to clearly consider themselves as a Brand and the services the brand offers too. Click and collect, delivery from store in under two hours, and alterations/customizations are among the opportunities to maximize the customer's time and reduce stress. Brand experiences are Human experiences so it needs to be worthwhile.



LONG-TERM RESPONSE

TAP INTO EXISTING DIGITAL NETWORKS

Brands should be providing a variety of options for the consumer for sales opportunities as well as platforms for navigating between these easily.

Local platforms can be utilised as gateways to sell sites



LONG-TERM RESPONSE

GENERATION GAP HAS SHRUNK- RAPIDLY

The Covid 19 Pandemic has forced older generations to embrace online delivery services.

Other services such as online medical consultancy and therapy have been adapted through necessity.



LONG-TERM RESPONSE

IMPLEMENT REAL-TIME INVENTORY SOLUTIONS

Consider machine learning enabled systems that can provide clarity and transparency of what your store has in stock both onsite and off.



LONG-TERM RESPONSE

BE TRANSPARENT ABOUT SUPPLY CHAIN LINEAGE

The current health crisis will have lasting implications to the supply chain that will affect businesses long after the doors open.



CONSUMERS
WILL DEMAND
A NEW RETAIL
ENVIRONMENT
THAT MEETS THEIR
NEW AND EVER
CHANGING
EXPECTATIONS

A modern office interior with a large, colorful, geometric ceiling installation made of many small, triangular panels in shades of blue, yellow, and red. The office has large windows, brick walls, and a wooden reception desk. Two people wearing face masks are walking in the background. The floor is light wood, and there are several colorful armchairs and ottomans. The overall atmosphere is bright and contemporary.

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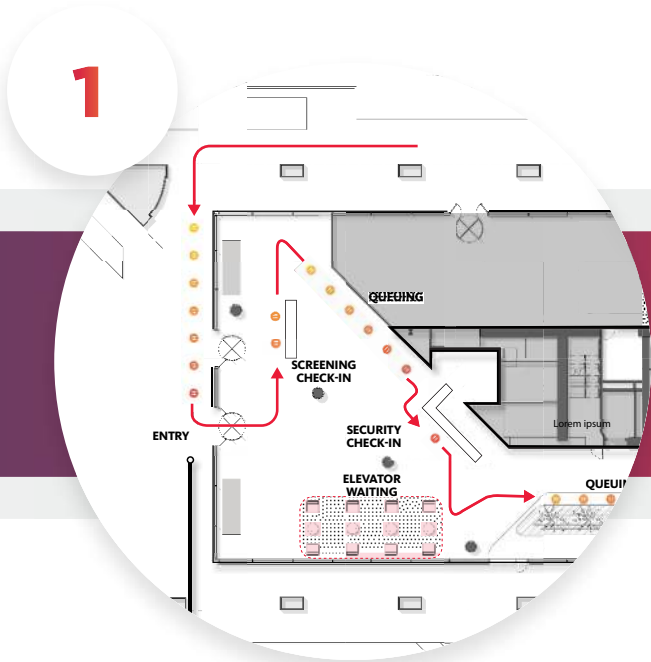
BACK TO THE OFFICE

RETURN STRATEGIES
FOR THE WORKPLACE
AND OFFICE BUILDINGS

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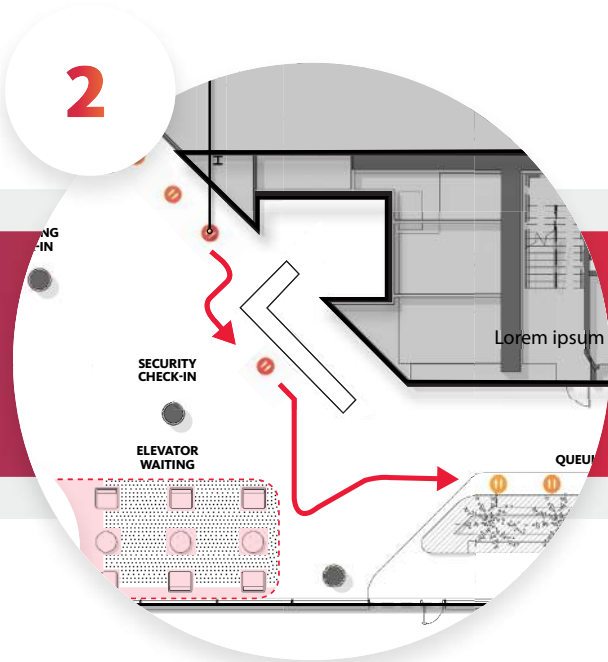
SPACE GUIDELINES - BUILDING

Building Access:
Entrances + Queuing



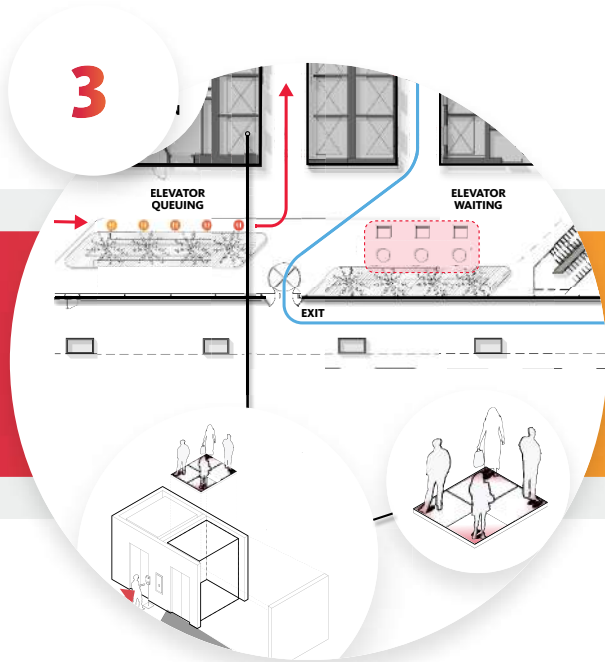
- Single door entries, automatic
- Limit entry points
- Floor decals to adhere to physical distancing guidelines

Building Lobby:
Screening, Check-in + Security



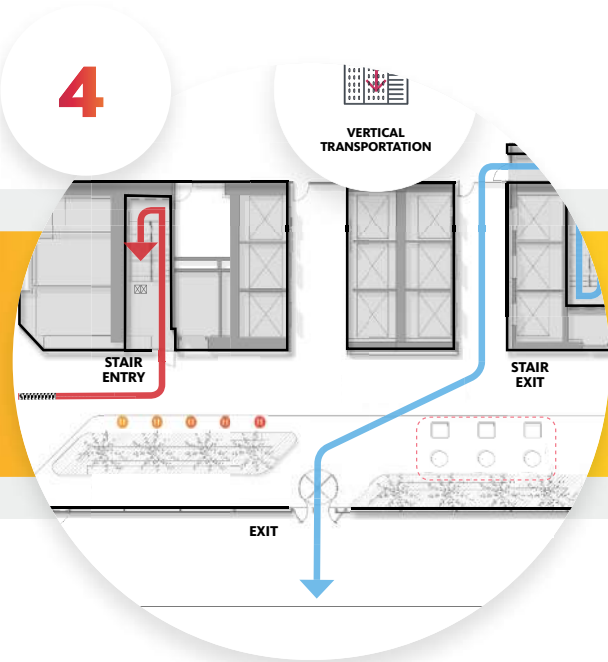
- Centralized check-in for health and wellness screening, monitoring, and sign-in
- Designated queuing and waiting area for elevators

Building Circulation:
Elevators



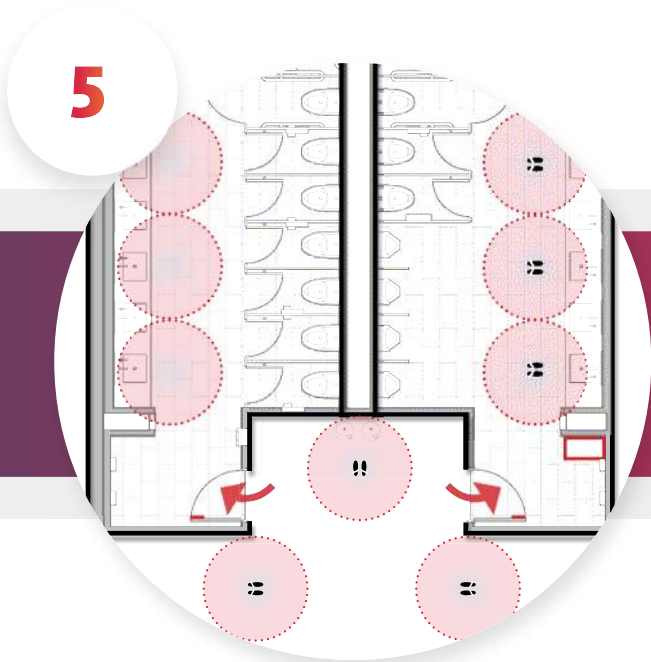
- Elevator capacity limited by cab size
- Floor decals to adhere to physical distancing guidelines: boarding, riding, and disembarking

Building Circulation:
Fire Stairs



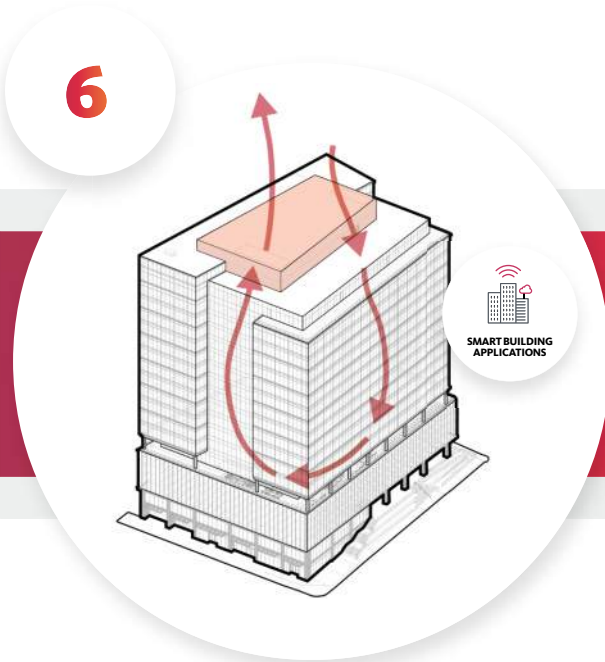
- Use fire stairs for one way traffic in lieu of elevators (for lower floors)

Building Public Space:
Restrooms



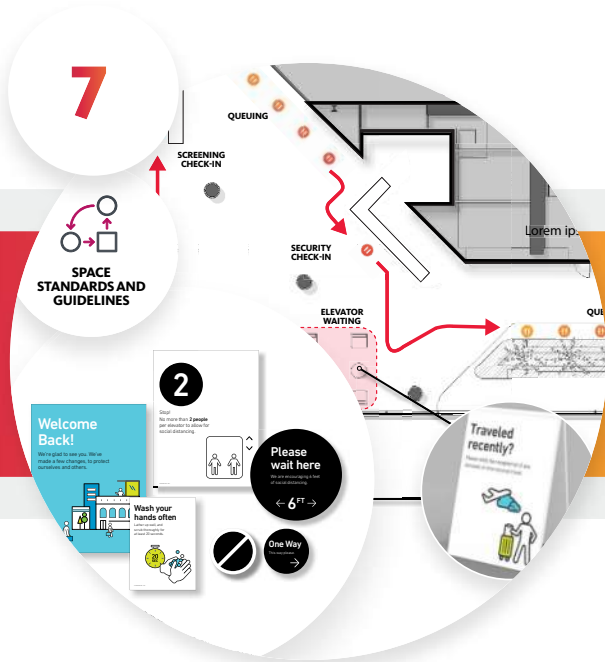
- Use alternating stalls to control capacity and support physical distancing, confirm with local code compliance
- Heightened cleaning protocols, with protocol + occupancy signage

Building Systems:
Filtration + Ventilation



- Increased fresh air intake
- Advanced air filtration
- Increase frequency of air flushing

Wayfinding, Signage +
Graphics



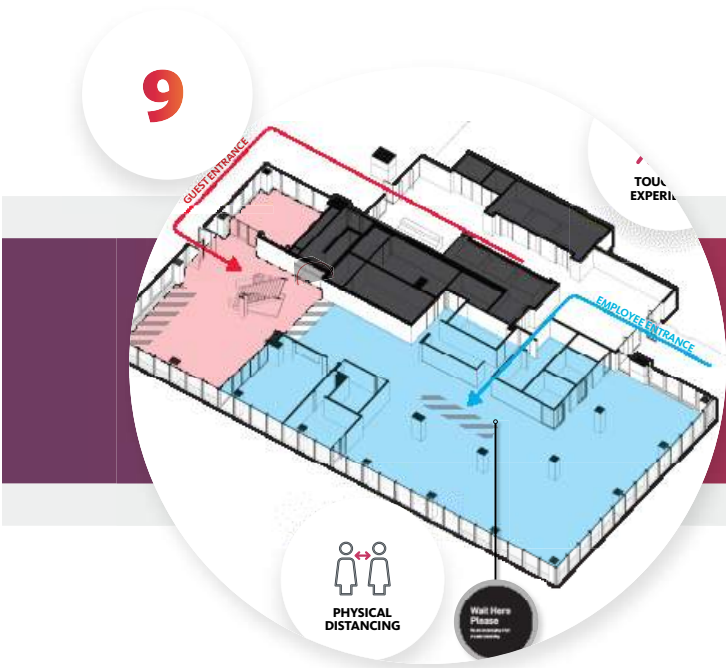
- Core, integrated and customized branding and signage components, supporting key areas
- Signage and decals to guide employees through multiple spaces and encourage best-practice protocols

Protocols + Cleaning



- Implement cleaning protocols
- Use signage to encourage people to clean equipment, door handles, and surfaces before and after use

Workplace Entrances:
Visitor + Employee



- Separated visitor and employee entrances + screening
- Designate employee safe zone after check-in, with no visitor access

Workplace Lobby:
Queuing + Check-In



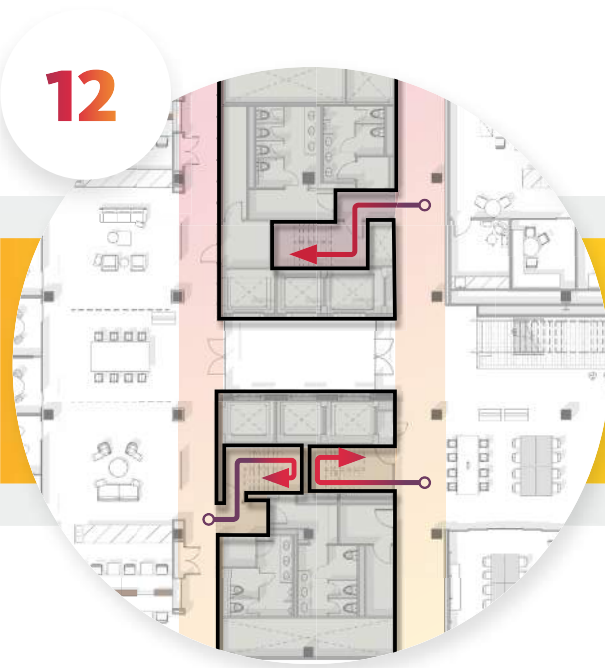
- Centralized check-in and monitoring
- Floor graphic decals to adhere to physical distancing guidelines

Workplace Circulation:
Path



- One way circulation, avoid crossing in opposite directions
- Paths noted with directional signage

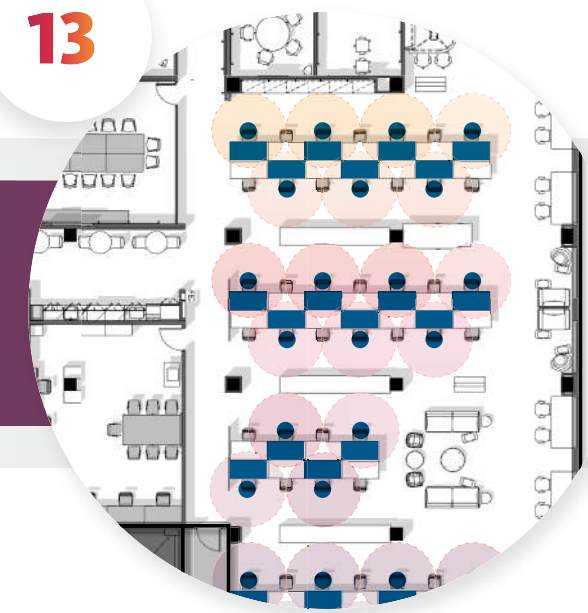
Workplace Circulation:
Fire Stairs



- Use fire stairs instead of elevators for multi-floor tenants
- Enhanced communications and signage

Workplace Open Plan:
De-densification

13



- Maintain physical distancing guidelines between individual desks
- Limit desks that would require people to directly face each other

Workplace:
Offices + Conference Rooms

14



- Doors to remain open
- Limited occupancy per room size
- Meeting members to participate virtually from the office or home

Workplace:
Collaborative + Food Spaces

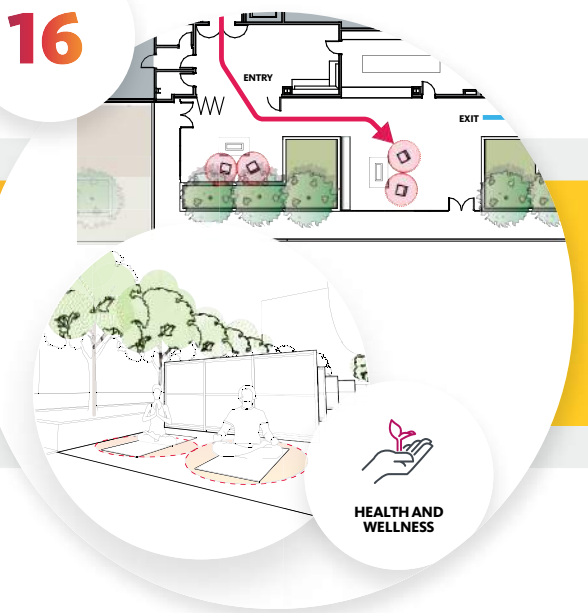
15



- Limit seating that would require people to directly face each other
- Designate physical distancing guidelines in pantry/kitchen/amenity areas

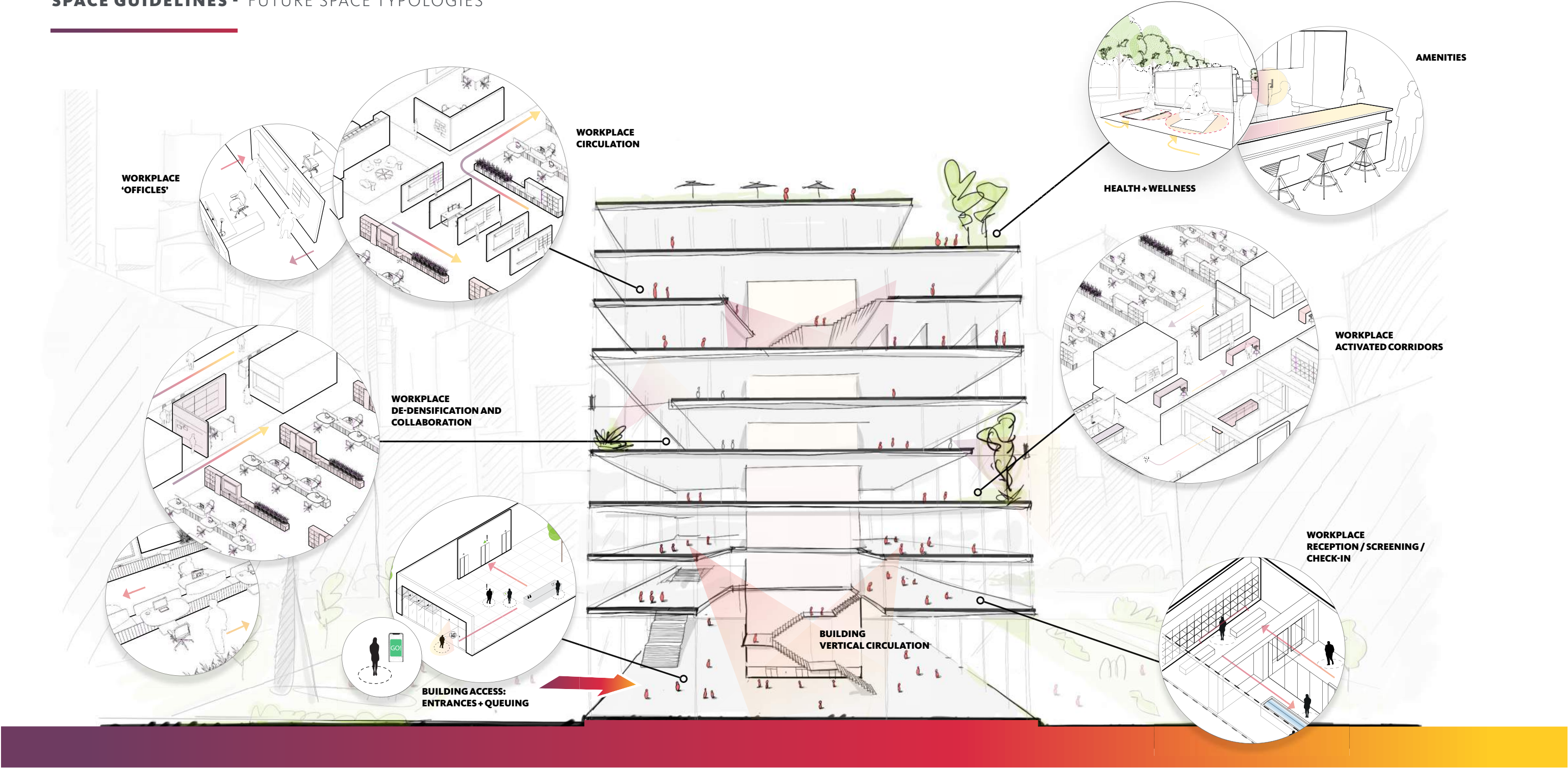
Workplace:
Outdoor Areas

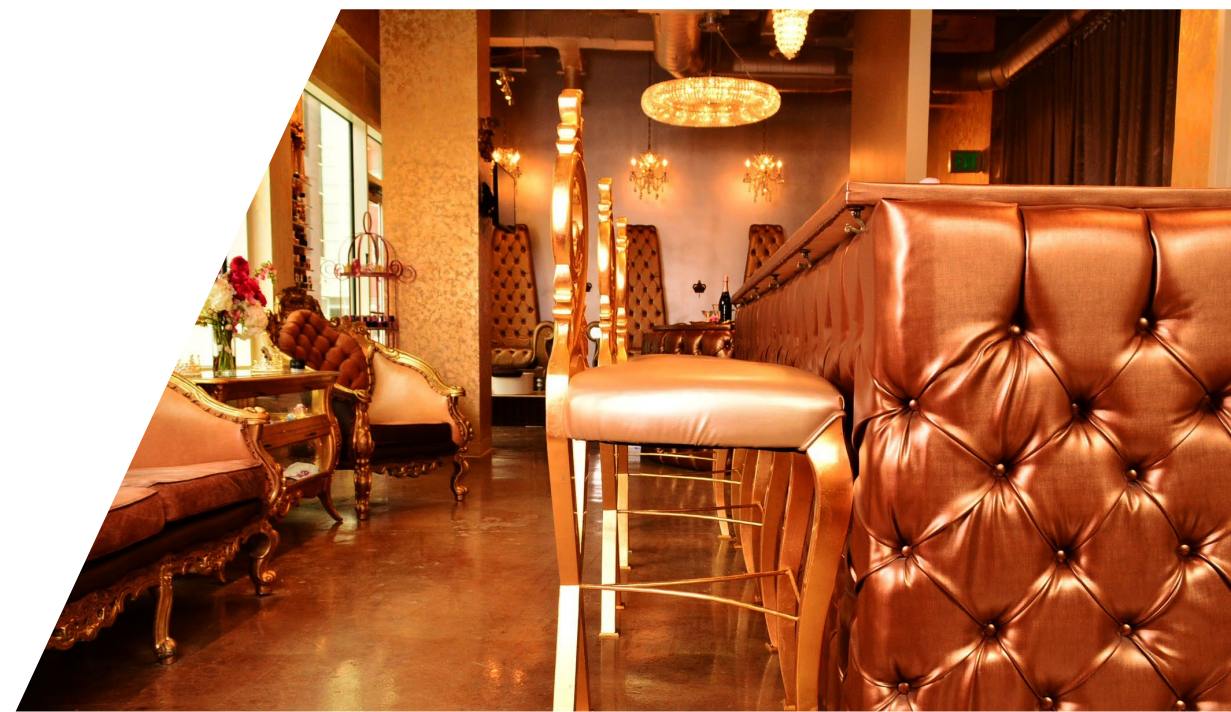
16



- Reconfigure to support physical distancing guidelines
- Limit seating that would require people to directly face each other

SPACE GUIDELINES - FUTURE SPACE TYPOLOGIES









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