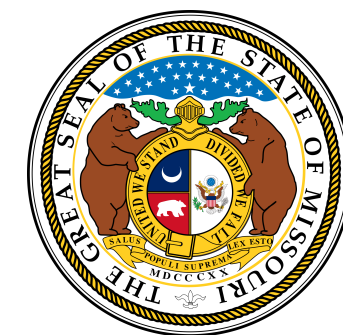
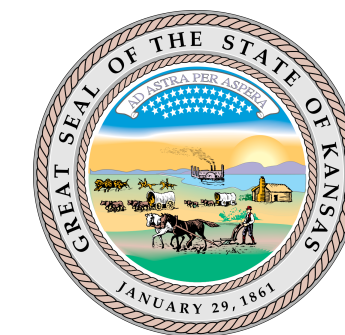




#STAYHOMEKC
#ONEKC

COVID-19 Survey Results

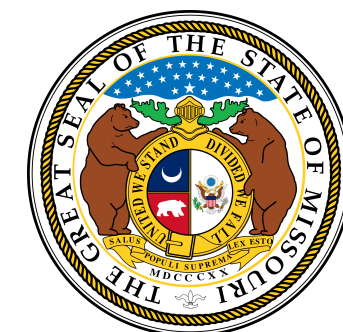
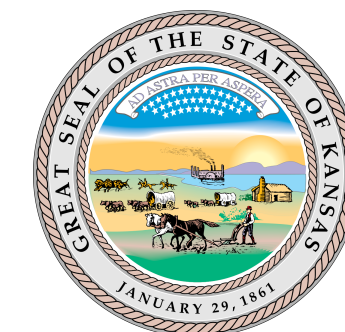
MARCH 30, 2020





Introduction

The **KC Chamber**, **Civic Council of Greater Kansas City** and the **Kansas City Area Development Council**, along with the **State of Kansas** and the **State of Missouri**, joined together to survey their collective membership and stakeholders across the two-state KC region regarding the immediate impact and planned response to the COVID-19 global pandemic. Responses from **nearly 350** KC area businesses are summarized below, with the collective goal of informing business partnerships, policy and trade efforts that will support and prepare KC's regional business community for the post-pandemic economy.





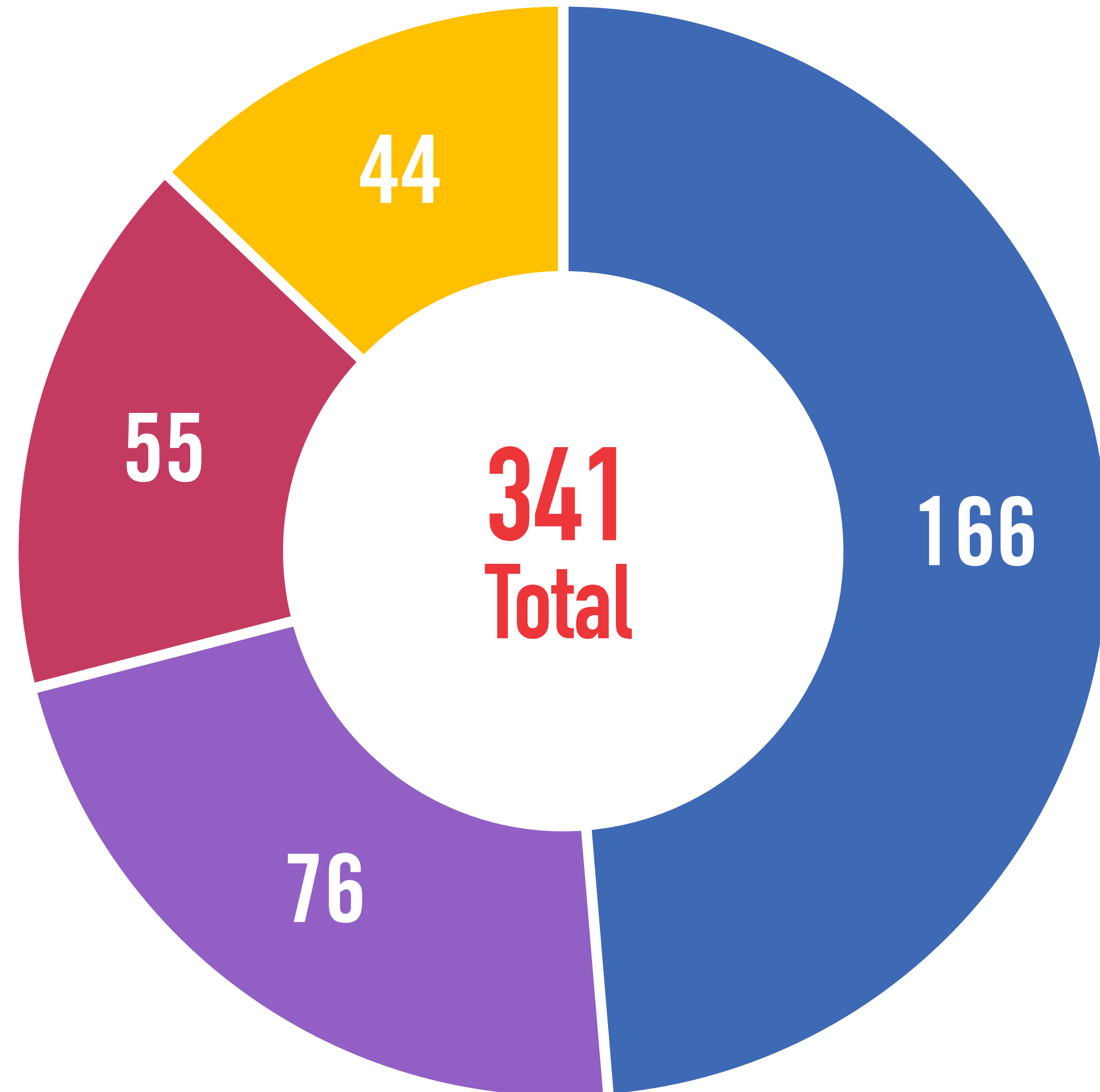
Respondents (by business size)

Small
(1 to 49 employees)

Medium
(50 to 249 employees)

Large
(250 to 999 employees)

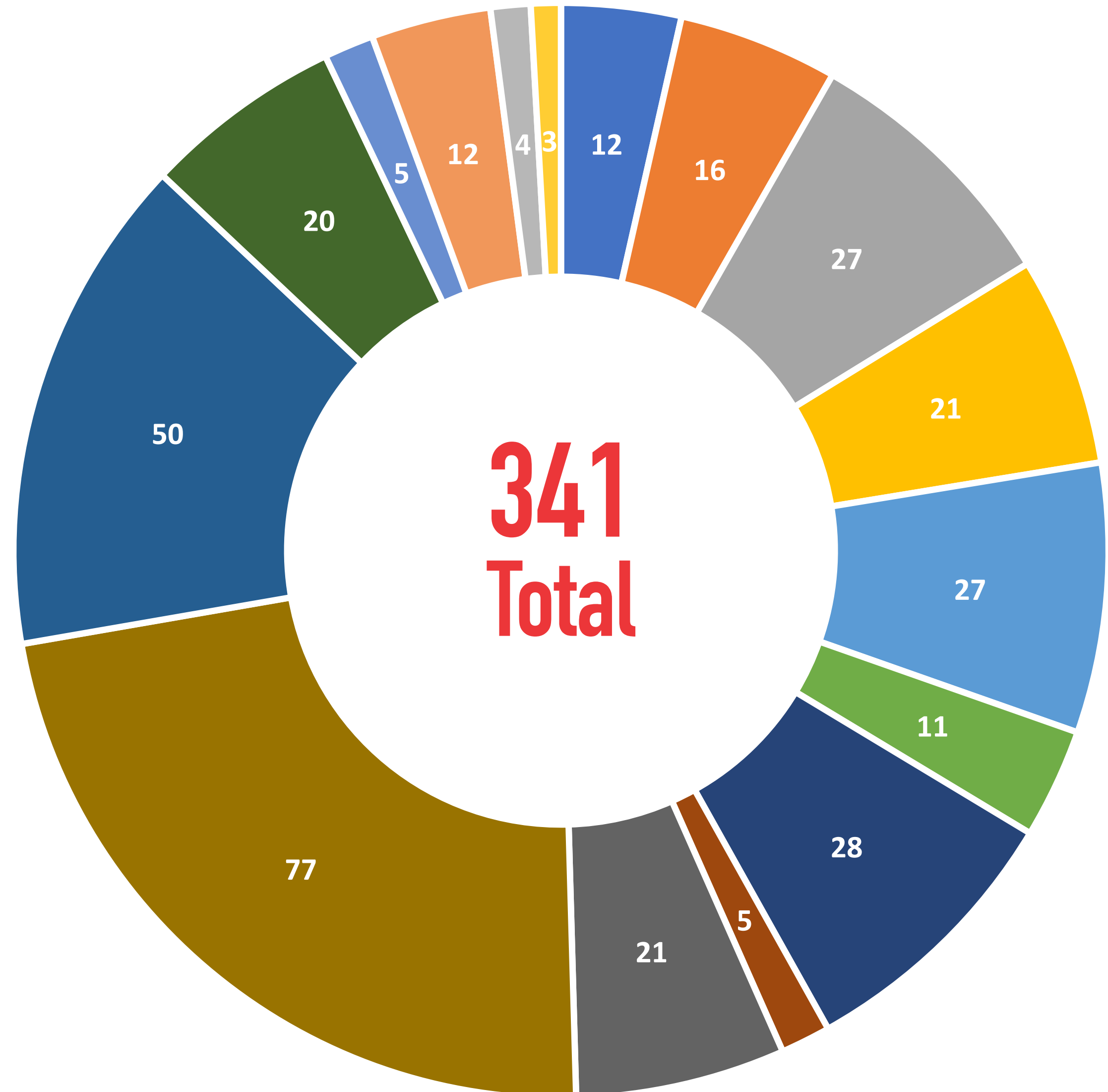
Extra Large
(1,000 or more employees)





Respondents (by industry)

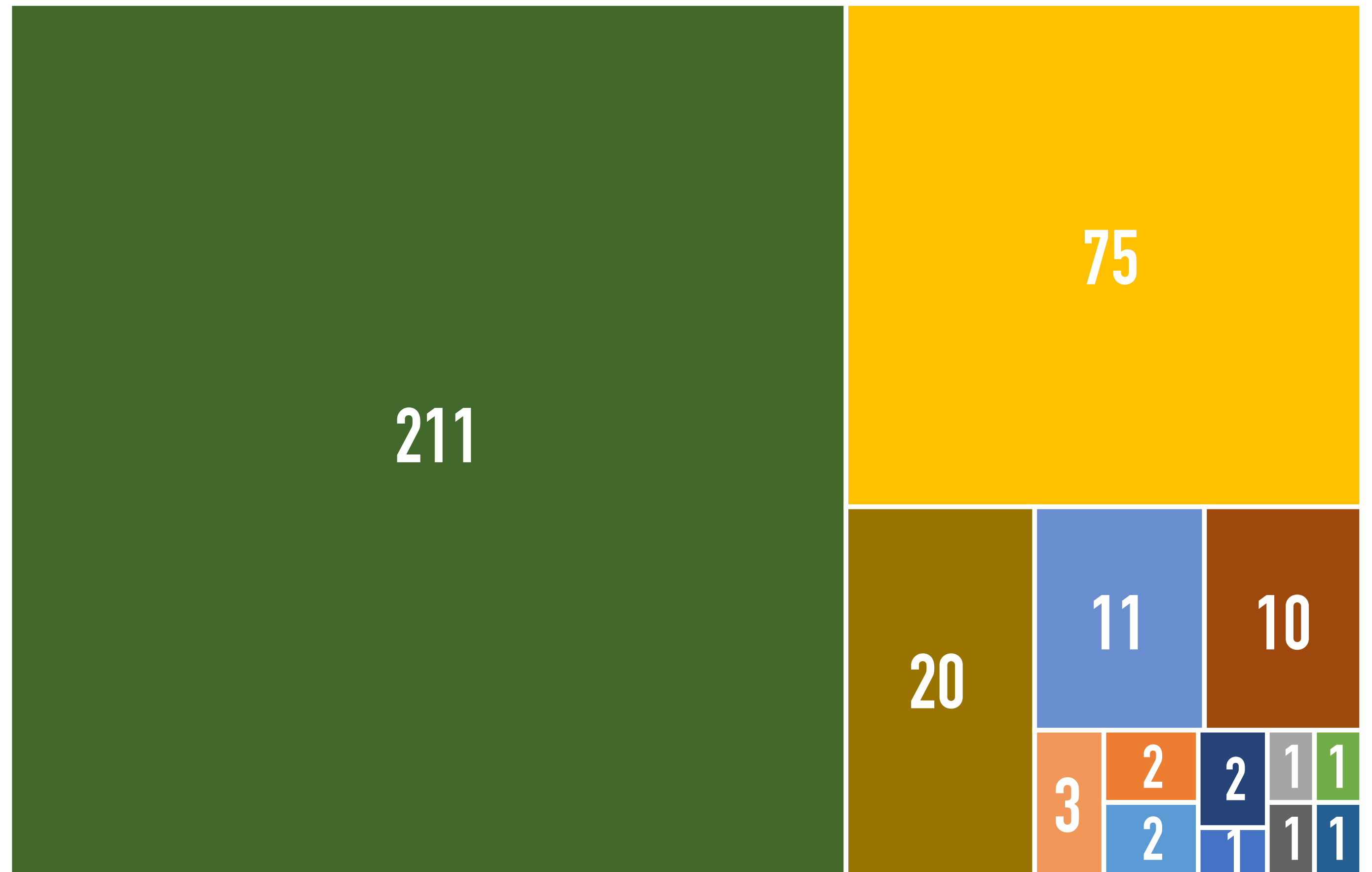
Accommodation and Food Services	12
Arts, Entertainment, and Recreation	16
Construction	27
Educational Services	21
Finance and Insurance	27
Government	11
Health Care and Social Assistance	28
Information	5
Manufacturing	21
Other Services	77
Professional, Scientific, and Technical Services	50
Real Estate and Rental and Leasing	20
Retail Trade	5
Transportation and Warehousing	12
Utilities	4
Wholesale Trade	3





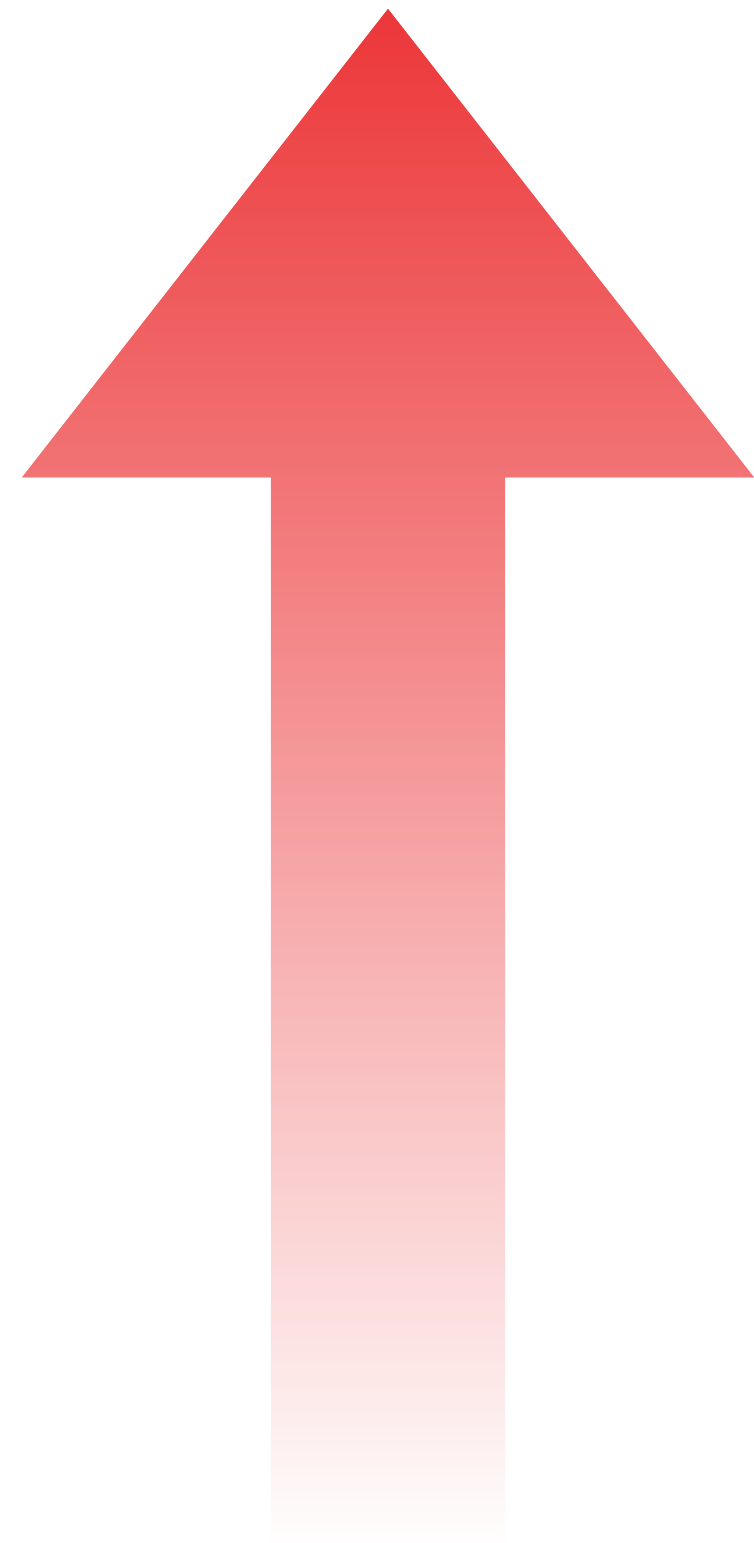
Respondents (by location)

Atchison County, Kansas – 1
Douglas County, Kansas – 2
Franklin County, Kansas – 1
Johnson County, Kansas – 75
Leavenworth County, Kansas – 2
Miami County, Kansas – 1
Shawnee County, Kansas – 2
Wyandotte County, Kansas – 10
Cass County, Missouri – 1
Clay County, Missouri – 20
Clinton County, Missouri – 1
Jackson County, Missouri – 211
Johnson County, Missouri – 11
Platte County, Missouri – 3





Top Worries (in order of most concerning)



Concern about the health and wellness of my workforce and their families

Uncertainty of the future

Concern about having to layoff staff

Meeting financial obligations

Impact to supply and/or demand within my industry

Availability of cleaning supplies and necessities for my place of employment



% of Respondents Taking Specific Extraordinary Measures with Employees





Write-in Comments

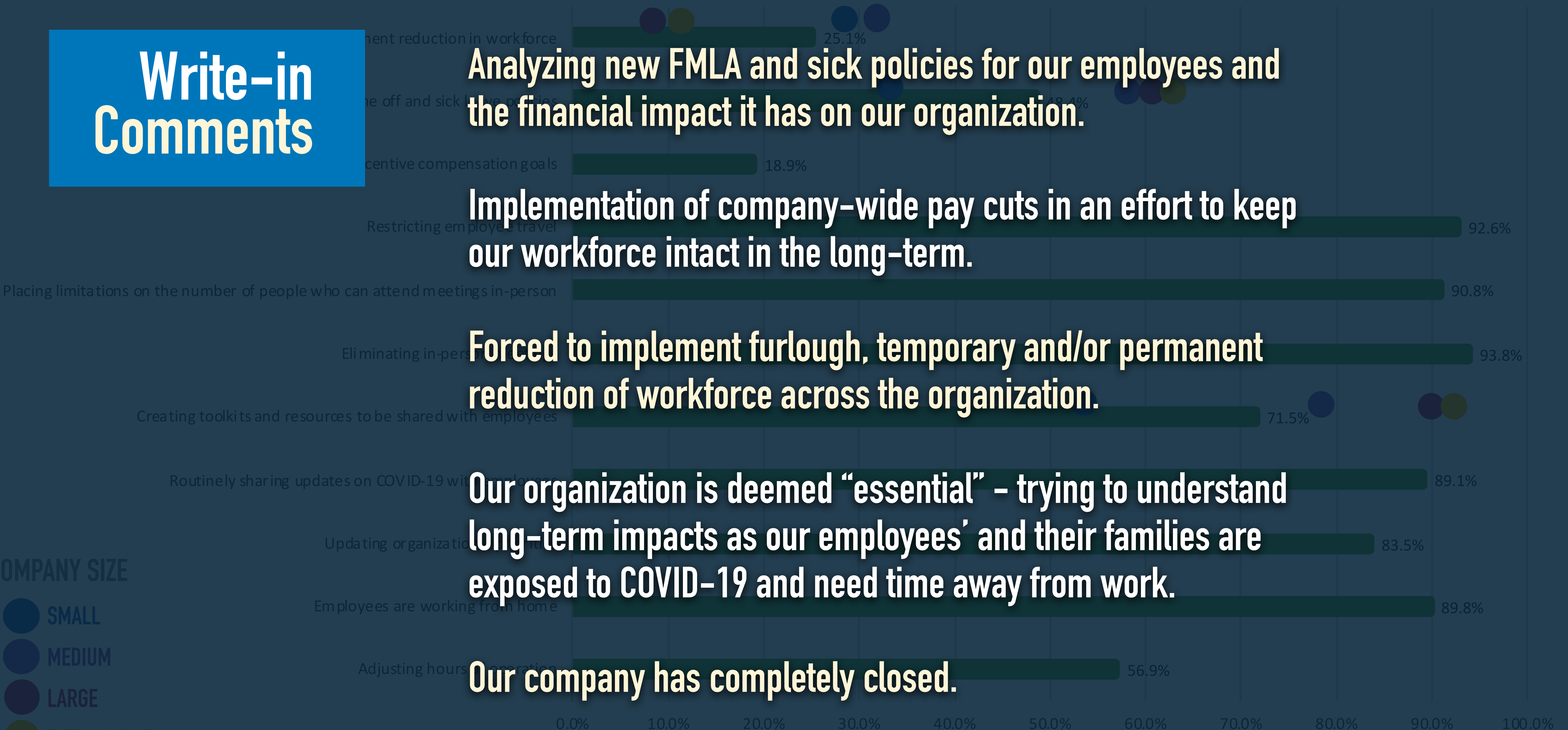
Analyzing new FMLA and sick policies for our employees and the financial impact it has on our organization.

Implementation of company-wide pay cuts in an effort to keep our workforce intact in the long-term.

Forced to implement furlough, temporary and/or permanent reduction of workforce across the organization.

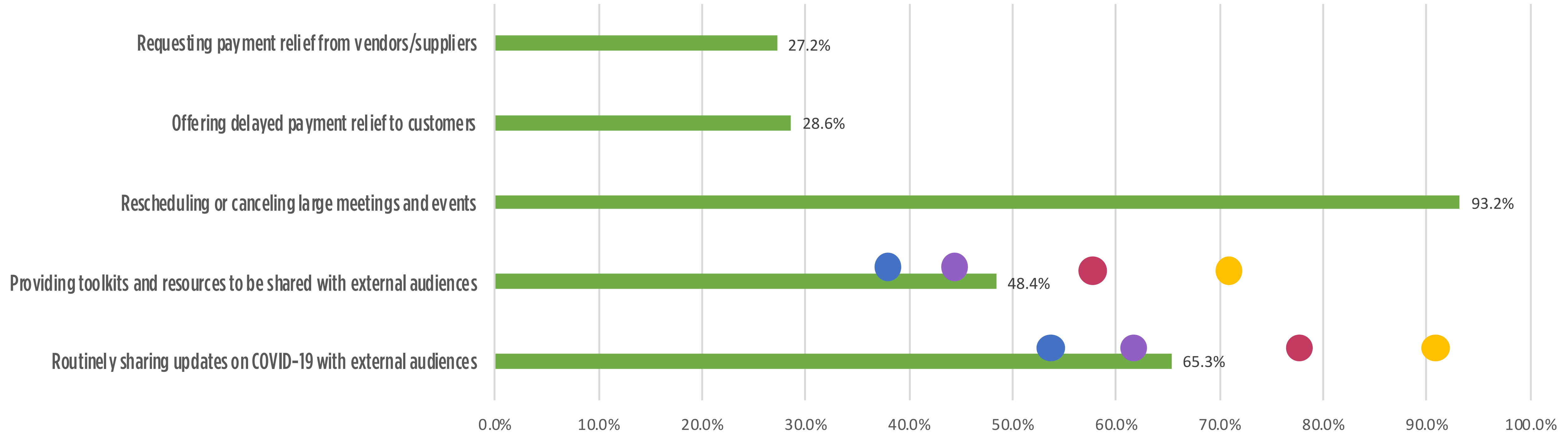
Our organization is deemed “essential” – trying to understand long-term impacts as our employees’ and their families are exposed to COVID-19 and need time away from work.

Our company has completely closed.





% Taking Extraordinary Measures with Customers, Clients, Vendors and Suppliers



** Results by industry - matrix attached as Appendix B

COMPANY SIZE

- SMALL
- MEDIUM
- LARGE
- EXTRA LARGE



Write-in Comments

Operating capital is our number one concern; we have the tenacity to see ourselves through this time.

We are working to get lenders and vendors to defer or waive payment obligations, as well as cutting expenses and potentially selling equipment.

Rescheduling or canceling large meetings and events

93.2%

Providing toolkits and resources to be shared with external audiences

48.4%

Routinely sharing updates on COVID-19 with external audiences

65.3%

0.0% 10.0% 20.0% 30.0% 40.0% 50.0% 60.0% 70.0% 80.0% 90.0% 100.0%

COMPANY SIZE



SMALL



MEDIUM



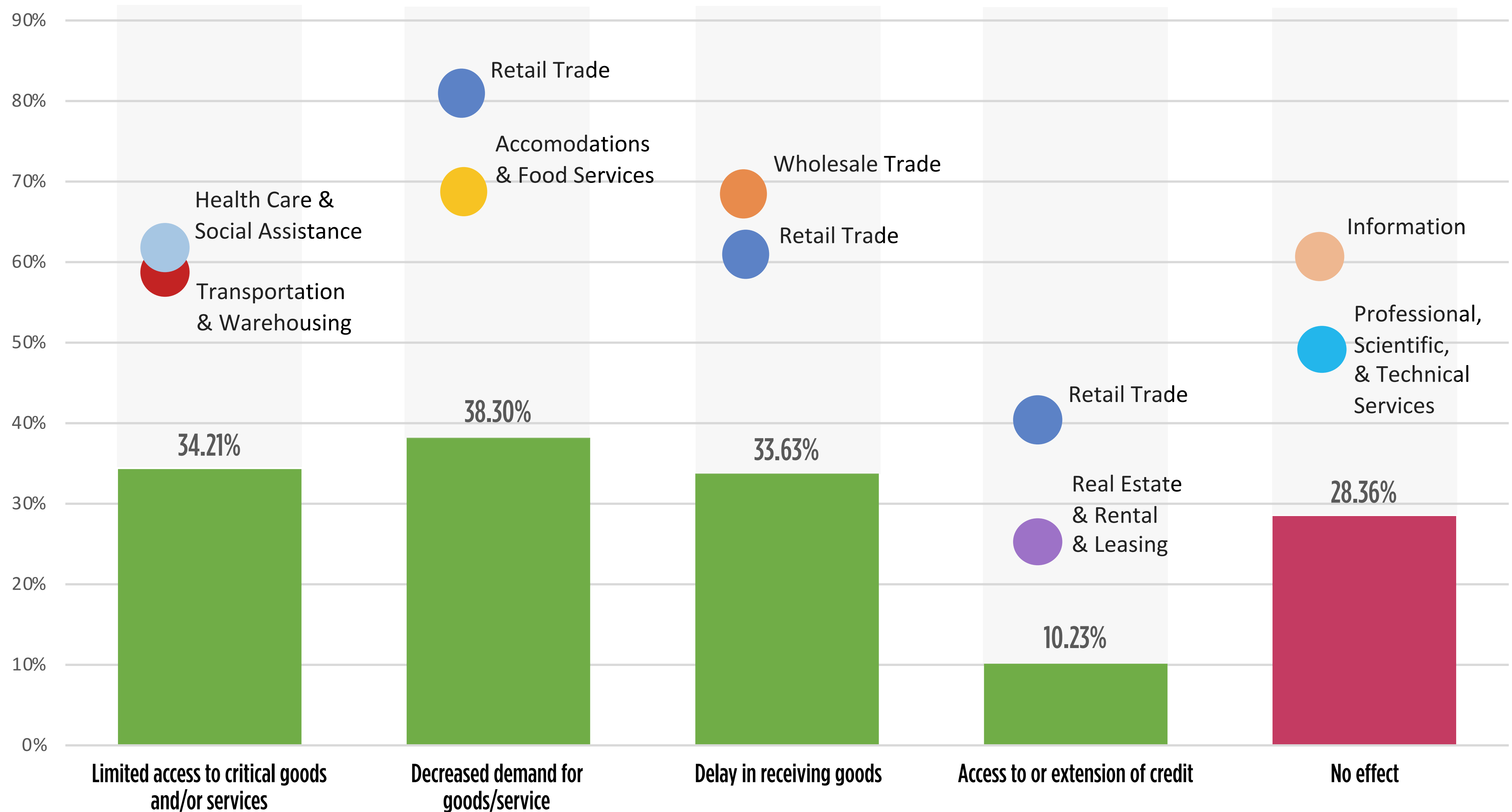
LARGE



EXTRA LARGE



% with Supply Chain Impacts



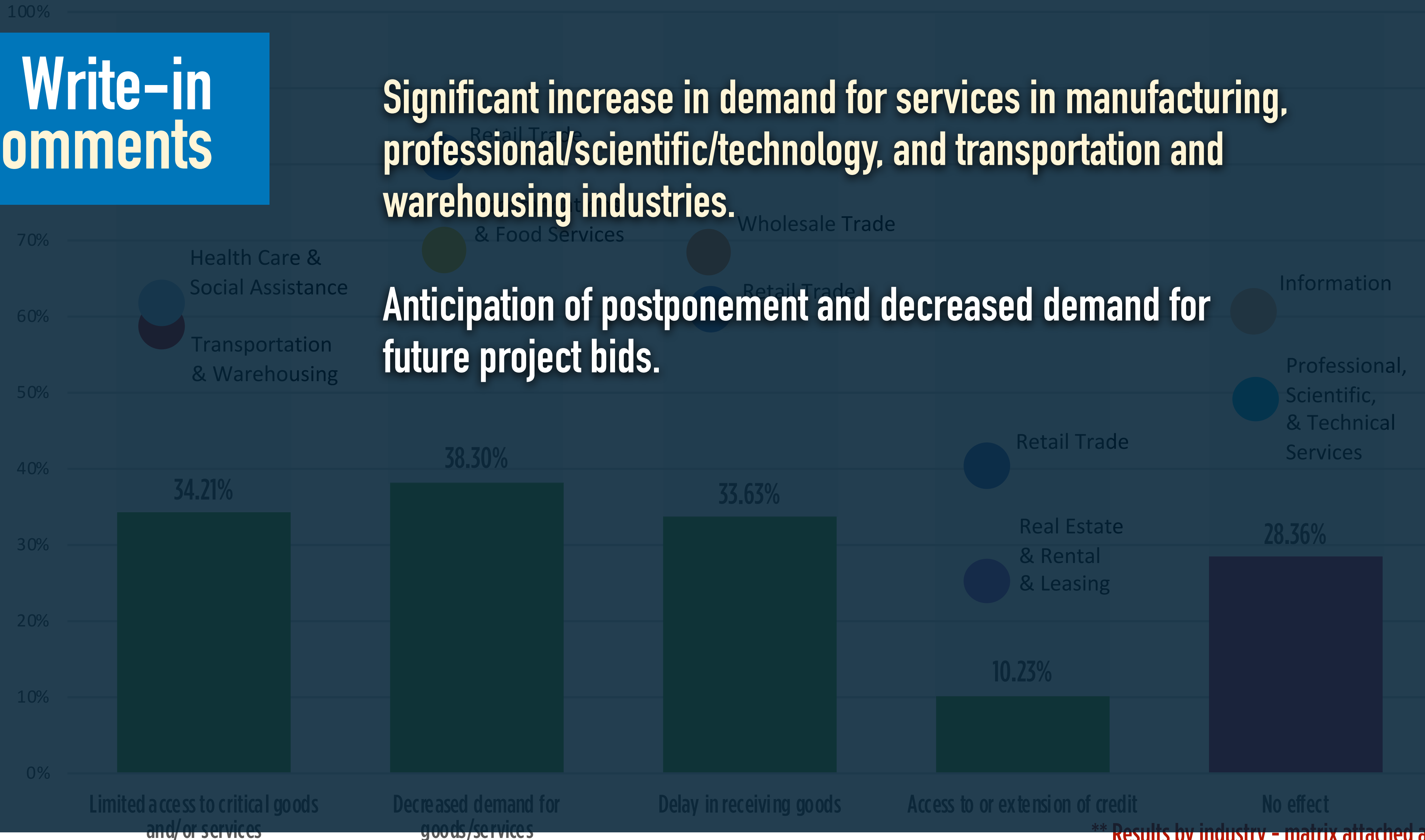


% with Supply Chain Impacts

Write-in Comments

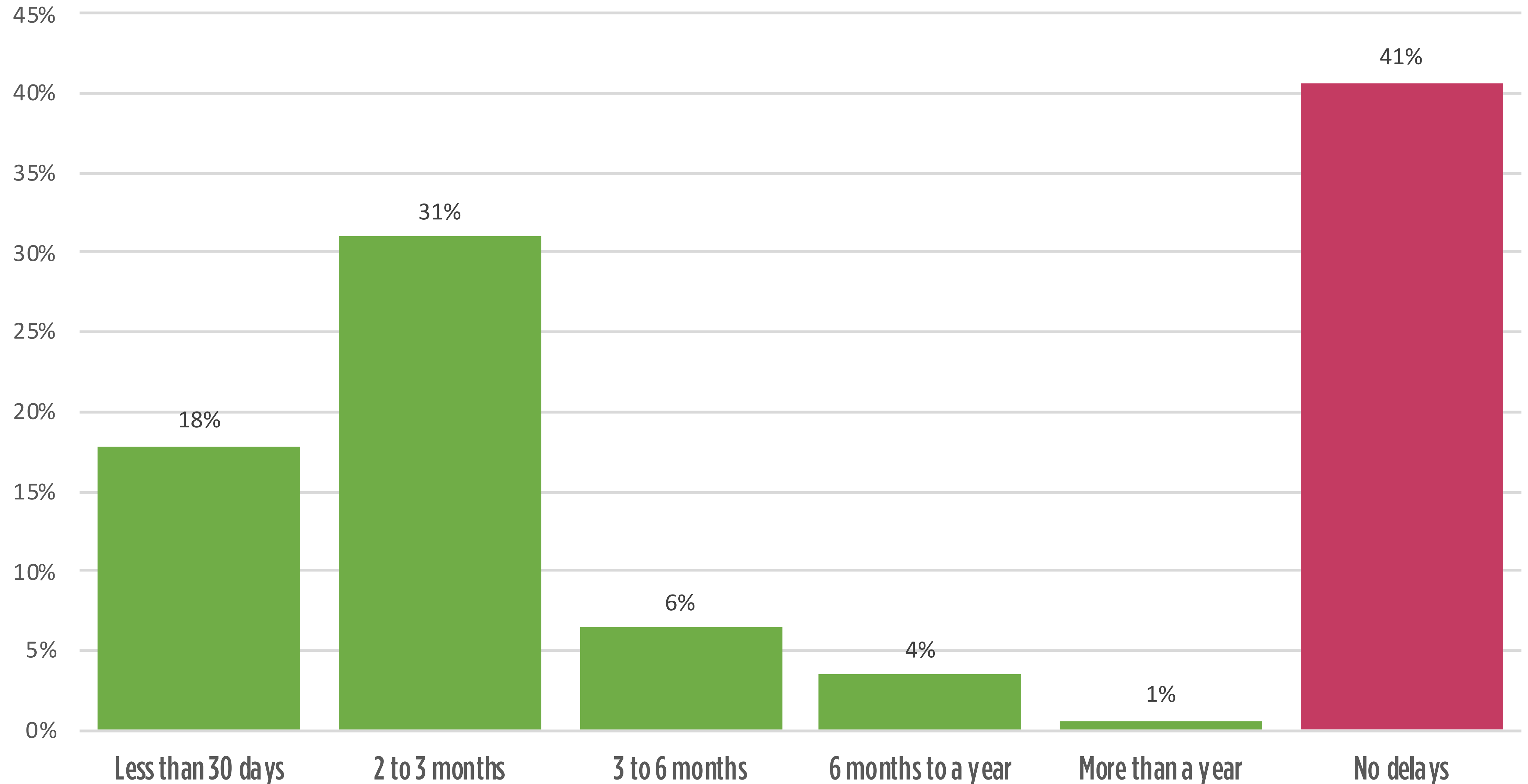
Significant increase in demand for services in manufacturing, professional/scientific/technology, and transportation and warehousing industries.

Anticipation of postponement and decreased demand for future project bids.



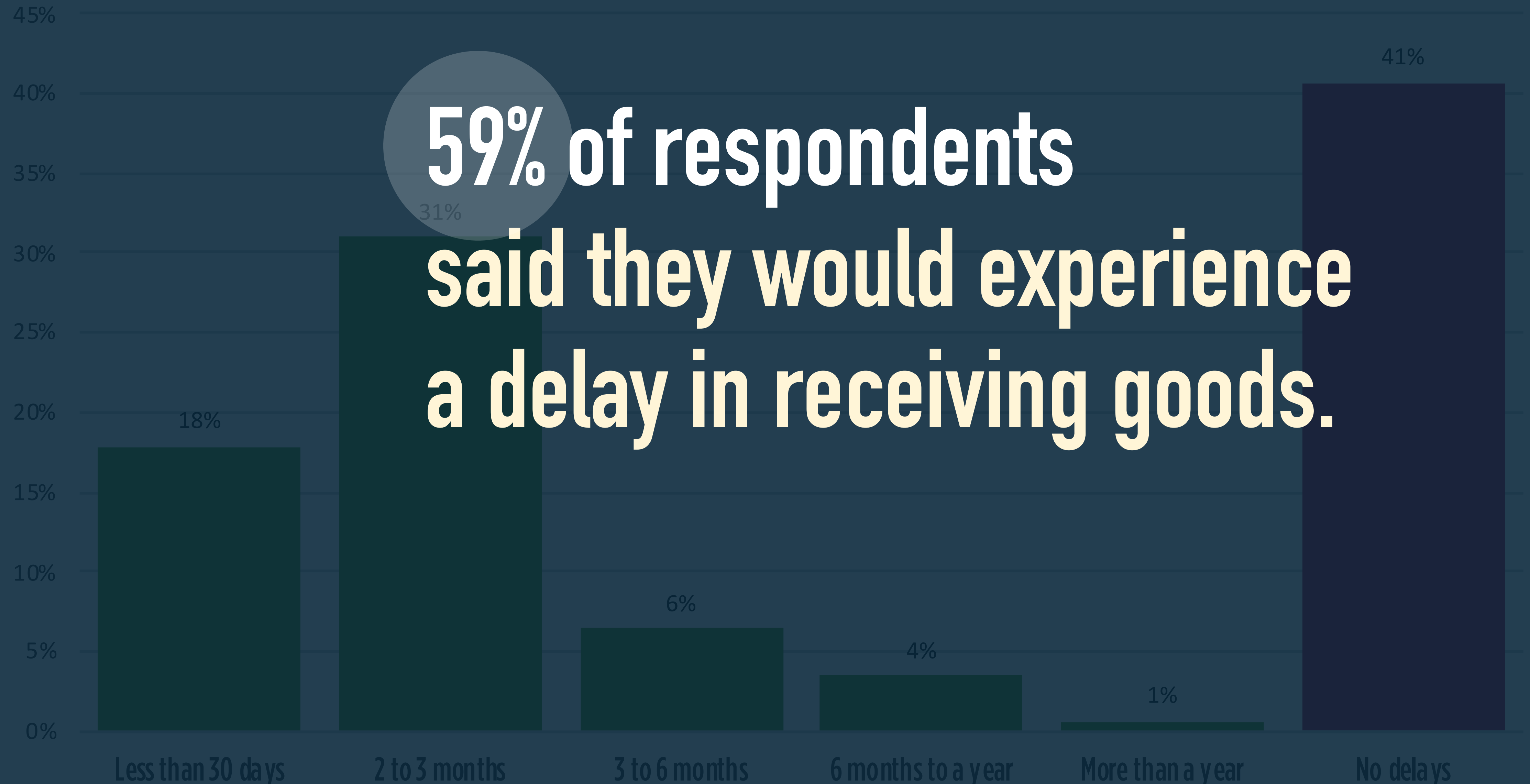


% with Expected Delay of Goods





% with Expected Delay of Goods





Most Critical Tools (in order of most needed)

Access to workforce

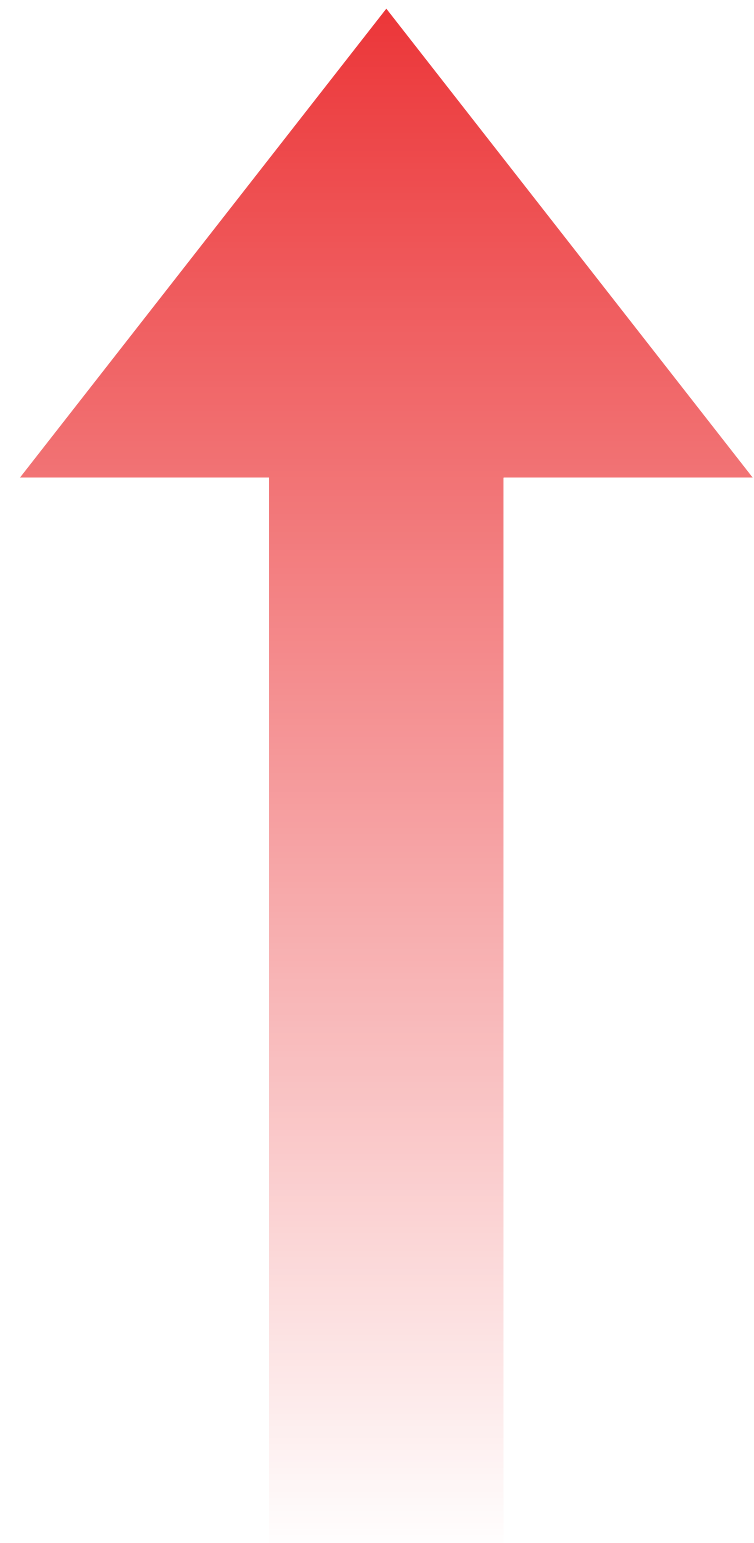
Tax relief

Short-term and low-interest loans

Marketing and communication assistance

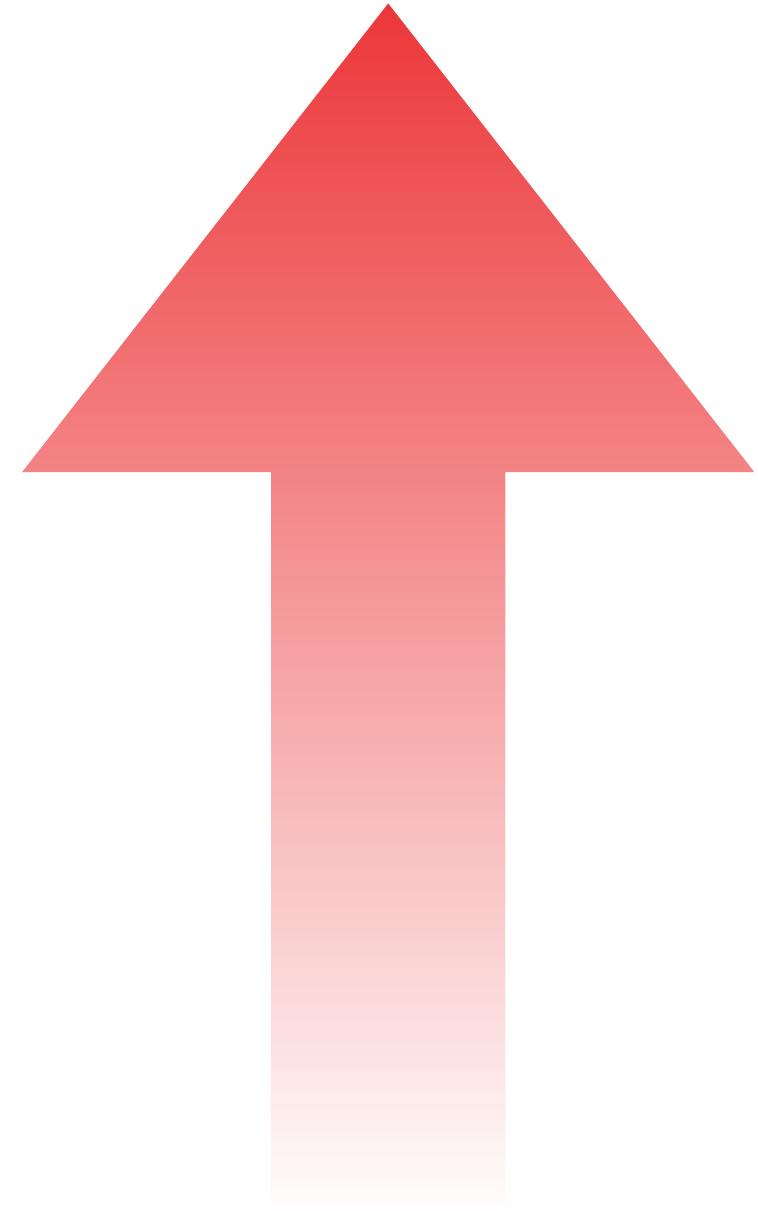
Supply-chain assistance

Technical assistance to apply for aid





Community Needs (in order of importance)



Access to medical care

Child care

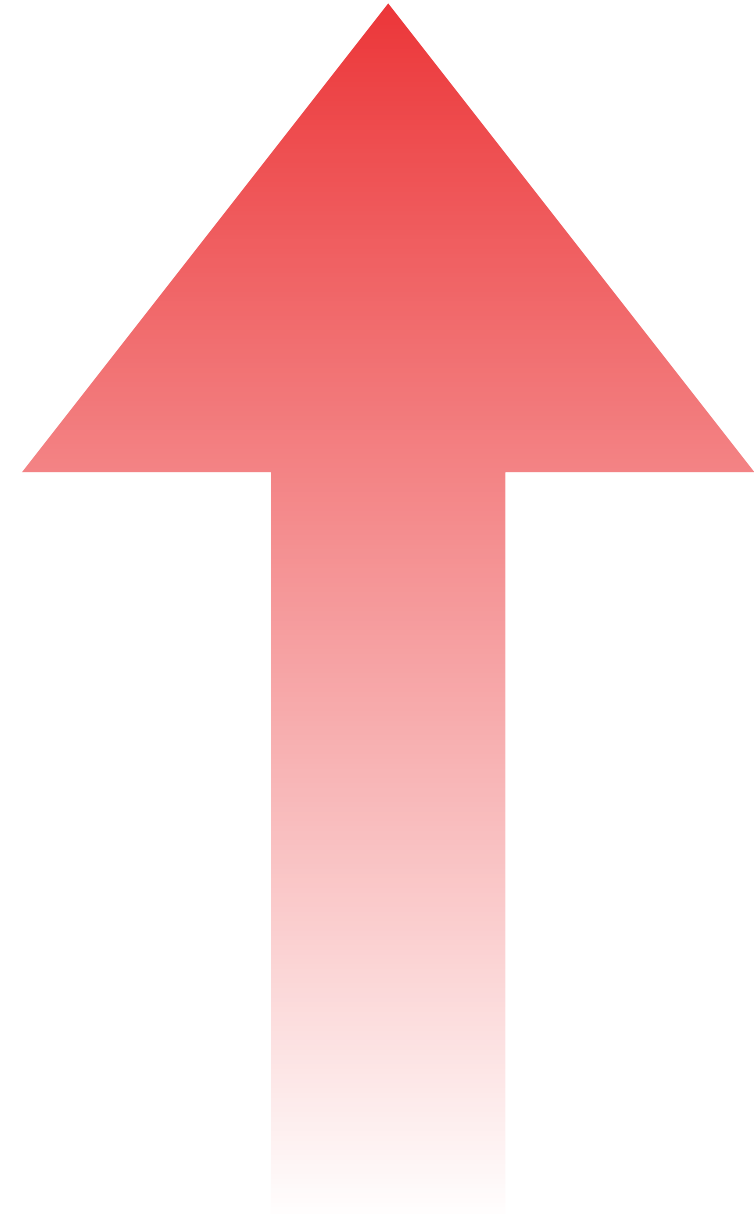
Food bank support

Housing relief



Community Needs (in order of importance)

Write-in Comments:



Supporting small businesses and nonprofits including financial aid.

Rent and mortgage relief both for both commercial and residential properties.

Interventions to help individuals who are homebound with food and necessities, as well as home checks of known domestic abuse offenders to ensure safety.

Support for displaced workers including financial relief and employment search resources.



Would your business be able to comply with HR 6201 (FMLA changes)? (by business size)

YES 

NO 

Small
(1 to 49 employees)

46%

54%

Medium
(50 to 249 employees)

67%

33%

Large
(250 to 999 employees)

66%

34%

Extra Large
(1,000 or more employees)

69%

31%



Would your business be able to comply with HR 6201 (FMLA changes)? (by business size)

Only 57% of all businesses would be able to comply.

Disproportionately harder for small businesses.

Small
(1 to 49 employees)

Medium
(50 to 249 employees)

Large
(250 to 999 employees)

Extra Large
(1,000 or more employees)

YES

NO

46%

54%

67%

33%

66%

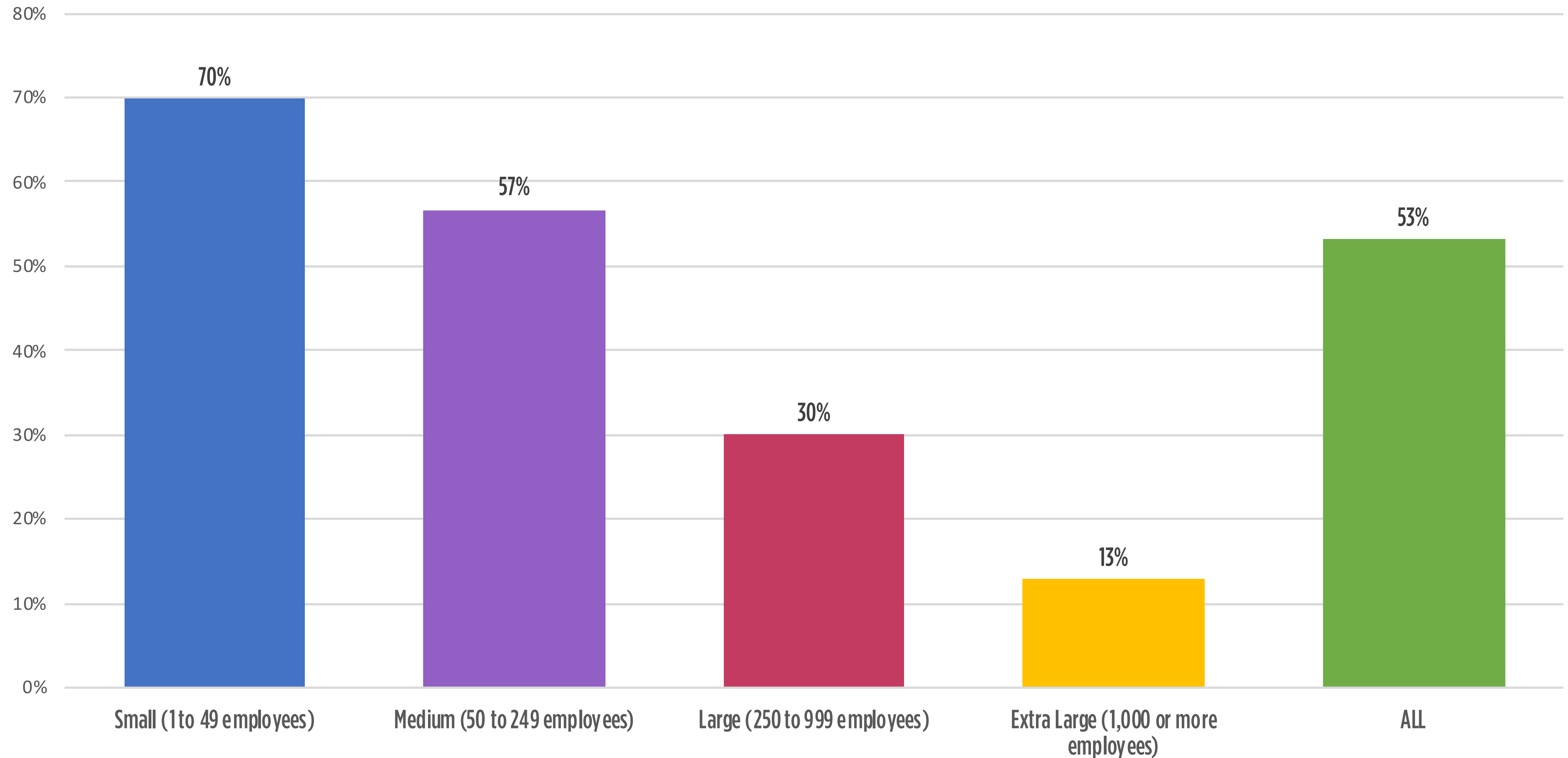
34%

69%

31%



Financial Obligation Struggles (by business size)





Financial Obligation Struggles (by business size)



53% of all businesses expect to struggle to meet financial obligations.

The larger the business, the more likely to meet financial obligations.



Interest in Low-Interest Rate SBA Loans

85

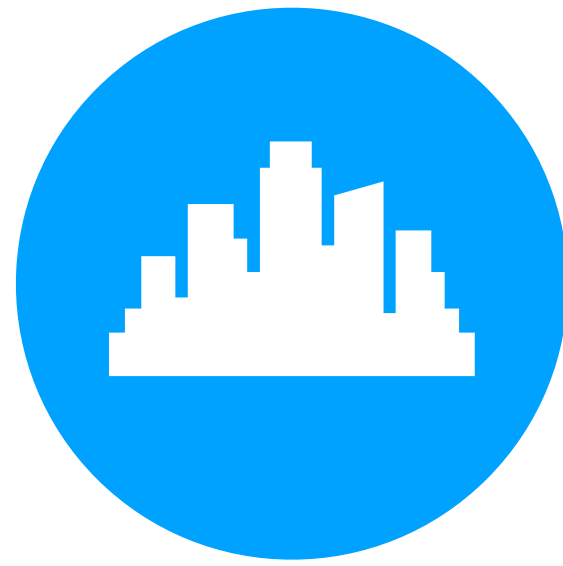
85 businesses responded that they would be interested in a low-interest rate SBA loan.

55%

55% of all Small to Medium-sized businesses (1 to 249 employees) responded that they would be interested in a low-interest rate SBA loan.



State/Federal regulation road blocks



The top impediment for businesses in the KC region is the inconsistency in the application of what is deemed an “essential business” across various state and local regulatory actions.



Top 5 Takeaways

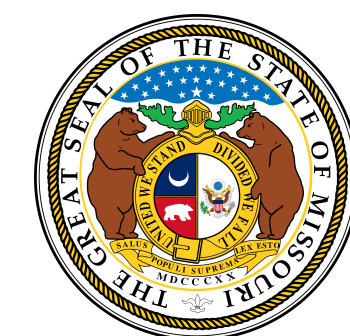
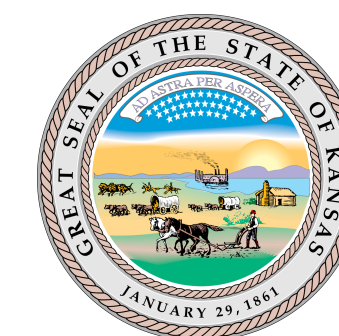
- 1** For companies large and small, employees' **health and well-being** is a top concern.
- 2** More than half of survey respondents **expect to struggle** to meet financial obligations.
- 3** One third of medium to extra large businesses and more than half of small businesses would **not be able to comply** with changes to FMLA.
- 4** One in four businesses are **reducing their workforce** temporarily or permanently.
- 5** When asked about the broader community, businesses listed these top concerns: **access to medical care; child care; food bank support; and housing relief.**



COVID-19 Survey Results

FOR MORE INFORMATION, PLEASE CONTACT:

KCPartners@thinkKC.com





Appendix A

Percentage of companies taking the following extraordinary measures with their employees at this time

By Industry

	<i>Adjusting hours of operation</i>	<i>Employees are working from home</i>	<i>Updating organizational priorities</i>	<i>Routinely sharing updates on COVID-19 with employees</i>	<i>Creating toolkits and resources to be shared with employees</i>	<i>Eliminating in-person meetings</i>	<i>Placing limitations on the number of people who can attend meetings in-person</i>	<i>Restricting employee travel</i>	<i>Updating employee incentive compensation goals</i>	<i>Changing time off and sick leave policies</i>	<i>Implementing temporary or permanent reduction in workforce</i>
Accommodation and Food Services	83%	42%	100%	100%	82%	73%	100%	91%	82%	45%	92%
Arts, Entertainment, and Recreation	82%	88%	88%	71%	65%	100%	88%	88%	24%	35%	47%
Construction	59%	100%	78%	100%	81%	100%	100%	96%	22%	48%	19%
Educational Services	80%	100%	95%	90%	81%	100%	90%	90%	5%	48%	19%
Finance and Insurance	41%	100%	81%	96%	78%	100%	89%	96%	7%	67%	11%
Government	100%	100%	90%	91%	90%	100%	100%	100%	27%	55%	18%
Health Care and Social Assistance	61%	79%	93%	100%	86%	86%	93%	89%	32%	68%	21%
Information	60%	100%	80%	100%	60%	100%	100%	100%	20%	0%	0%
Manufacturing	62%	81%	85%	100%	76%	81%	90%	95%	10%	57%	29%
Other Services	47%	88%	81%	86%	65%	91%	91%	87%	19%	40%	30%
Professional, Scientific, and Technical Services	42%	100%	80%	71%	60%	98%	84%	100%	14%	38%	15%
Real Estate and Rental and Leasing	65%	95%	85%	95%	70%	95%	95%	95%	10%	55%	10%
Retail Trade	100%	100%	100%	80%	75%	100%	80%	100%	20%	60%	80%
Transportation and Warehousing	25%	50%	67%	100%	75%	92%	83%	83%	17%	58%	17%
Utilities	50%	100%	100%	100%	75%	100%	100%	75%	0%	75%	25%
Wholesale Trade	33%	100%	67%	67%	0%	100%	100%	100%	0%	33%	33%



Appendix B

Percentage of companies taking the following extraordinary measures with their external customers, clients, vendors and suppliers at this time

By Industry

	<i>Routinely sharing updates on COVID-19 with external audiences</i>	<i>Providing toolkits and resources to be shared with external audiences</i>	<i>Rescheduling or canceling large meetings and events</i>	<i>Offering delayed payment relief to customers</i>	<i>Requesting payment relief from vendors/suppliers</i>
Accommodation and Food Services	92%	42%	100%	25%	67%
Arts, Entertainment, and Recreation	41%	35%	88%	35%	29%
Construction	74%	63%	96%	19%	19%
Educational Services	71%	62%	100%	33%	24%
Finance and Insurance	78%	59%	96%	48%	11%
Government	80%	64%	100%	45%	27%
Health Care and Social Assistance	79%	64%	96%	19%	27%
Information	80%	60%	80%	20%	40%
Manufacturing	76%	30%	95%	20%	25%
Other Services	61%	42%	89%	28%	29%
Professional, Scientific, and Technical Services	41%	39%	94%	20%	23%
Real Estate and Rental and Leasing	70%	60%	95%	50%	25%
Retail Trade	40%	40%	80%	20%	100%
Transportation and Warehousing	75%	33%	83%	17%	42%
Utilities	75%	75%	100%	50%	0%
Wholesale Trade	67%	0%	67%	33%	0%



Appendix C

Percentage of companies experiencing the following impacts to their supply chain

By Industry

	Limited access to critical goods and/or services	Decreased demand for goods/services	Delay in receiving goods	Access to or extension of credit	No effect
Accommodation and Food Services	50%	67%	58%	8%	0%
Arts, Entertainment, and Recreation	29%	53%	18%	24%	41%
Construction	22%	33%	56%	4%	37%
Educational Services	33%	33%	29%	19%	33%
Finance and Insurance	26%	19%	26%	11%	30%
Government	55%	27%	55%	9%	36%
Health Care and Social Assistance	61%	25%	36%	11%	18%
Information	20%	20%	20%	0%	60%
Manufacturing	38%	48%	48%	5%	19%
Other Services	34%	47%	29%	8%	21%
Professional, Scientific, and Technical Services	18%	28%	22%	4%	48%
Real Estate and Rental and Leasing	40%	55%	35%	25%	10%
Retail Trade	40%	80%	60%	40%	20%
Transportation and Warehousing	58%	42%	33%	8%	33%
Utilities	0%	25%	25%	25%	25%
Wholesale Trade	33%	0%	67%	0%	0%