COVID-19 Survey Results

MARCH 30, 2020
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) - 44
- Medium (50 to 249 employees) - 55
- Large (250 to 999 employees) - 76
- Extra Large (1,000 or more employees) - 166

Total: 341
COVID-19 Survey Results

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
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
COVID-19 Survey Results

Percentage of Respondents Taking Specific Extraordinary Measures with Employees

- Implementing temporary or permanent reduction in workforce: 25.1%
- Changing time off and sick leave policies: 48.4%
- Updating employee incentive compensation goals: 18.9%
- Restricting employee travel: 92.6%
- Placing limitations on the number of people who can attend meetings in-person: 90.8%
- Eliminating in-person meetings: 93.8%
- Creating toolkits and resources to be shared with employees: 71.5%
- Routinely sharing updates on COVID-19 with employees: 89.1%
- Updating organizational priorities: 83.5%
- Employees are working from home: 89.8%
- Adjusting hours of operation: 56.9%

**Results by industry - matrix attached as Appendix A**
% of Respondents Taking Specific Extraordinary Measures with Employees

- Adjusting hours of operation (56.9%)
- Employees are working from home (89.8%)
- Updating organizational priorities (83.5%)
- Routinely sharing updates on COVID-19 with employees (89.1%)
- Creating toolkits and resources to be shared with employees (71.5%)
- Eliminating in-person meetings (61.5%)
- Restricting employee travel (93.8%)
- Updating employee incentive compensation goals (48.4%)
- Placing limits on the number of people who can attend meetings in-person (25.1%)
- Restricting employee travel (93.8%)
- Analyzing new FMLA and sick policies for our employees and the financial impact it has on our organization (20.0%)
- Implementation of company-wide pay cuts in an effort to keep our workforce intact in the long-term (92.6%)
- Forcing to implement furlough, temporary and/or permanent reduction of workforce across the organization (93.8%)
- 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 (89.1%)
- Our company has completely closed (89.8%)

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.
- Forcing 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.
COVID-19 Survey Results

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

- Requesting payment relief from vendors/suppliers: 27.2%
- Offering delayed payment relief to customers: 28.6%
- 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%

**Results by industry - matrix attached as Appendix B**
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.
COVID-19 Survey Results

% with Supply Chain Impacts

Limited access to critical goods and/or services: 34.21%
Decreased demand for goods/services: 38.30%
Delay in receiving goods: 33.63%
Access to or extension of credit: 10.23%
No effect: 28.36%

**Results by industry - matrix attached as Appendix C**
COVID-19 Survey Results

% with Supply Chain Impacts

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.

Results by Industry - matrix attached as Appendix C
COVID-19 Survey Results

% with Expected Delay of Goods

- Less than 30 days: 18%
- 2 to 3 months: 31%
- 3 to 6 months: 6%
- 6 months to a year: 4%
- More than a year: 1%
- No delays: 41%
59% of respondents said they would experience a delay in receiving 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)

<table>
<thead>
<tr>
<th>Business Size</th>
<th>YES</th>
<th>NO</th>
</tr>
</thead>
<tbody>
<tr>
<td>Small (1 to 49)</td>
<td>46%</td>
<td>54%</td>
</tr>
<tr>
<td>Medium (50 to 249)</td>
<td>67%</td>
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<tr>
<td>Large (250 to 999)</td>
<td>66%</td>
<td>34%</td>
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<tr>
<td>Extra Large (1,000+)</td>
<td>69%</td>
<td>31%</td>
</tr>
</tbody>
</table>
COVID-19 Survey Results

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

(by business size)

- **Small** (1 to 49 employees):
  - Yes: 67%
  - No: 33%

- **Medium** (50 to 249 employees):
  - Yes: 66%
  - No: 34%

- **Large** (250 to 999 employees):
  - Yes: 69%
  - No: 31%

- **Extra Large** (1,000 or more employees):
  - Yes: 70%
  - No: 30%

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

Disproportionately harder for small businesses.
COVID-19 Survey Results

Financial Obligation Struggles (by business size)

- Small (1 to 49 employees): 70%
- Medium (50 to 249 employees): 57%
- Large (250 to 999 employees): 30%
- Extra Large (1,000 or more employees): 13%
- All: 53%
53% of all businesses expect to struggle to meet financial obligations. The larger the business, the more likely to meet financial obligations.
85 businesses responded that they would be interested in a low-interest rate SBA loan.

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.
For companies large and small, employees’ health and well-being is a top concern.

More than half of survey respondents expect to struggle to meet financial obligations.

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.

One in four businesses are reducing their workforce temporarily or permanently.

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

<table>
<thead>
<tr>
<th>By Industry</th>
<th>Adjusting hours of operation</th>
<th>Employees are working from home</th>
<th>Updating operational priorities</th>
<th>Routinely sharing updates on COVID-19 with employees</th>
<th>Creating isolated areas and resources to be reached in person</th>
<th>Enhancing in-person meetings</th>
<th>Physical limitations on the number of people who can attend in-person meetings</th>
<th>Restricting employee travel</th>
<th>Updating employee incentive compensation</th>
<th>Changing time of end- and lease policies</th>
<th>Implementing temporary or permanent reduction in workforce</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accommodation and Food Services</td>
<td>83%</td>
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<td>100%</td>
<td>73%</td>
<td>100%</td>
<td>91%</td>
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<td>82%</td>
<td>86%</td>
<td>86%</td>
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<td>65%</td>
<td>100%</td>
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</tbody>
</table>
# COVID-19 Survey Results

## Appendix B

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

### By Industry

<table>
<thead>
<tr>
<th>Industry</th>
<th>Routinely sharing updates on COVID-19 with external audiences</th>
<th>Preventing travel and resources to be shared with external audiences</th>
<th>Rescheduling or canceling large meetings and events</th>
<th>Offering delayed payment relief to customers</th>
<th>Requesting payment relief from vendors/suppliers</th>
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</thead>
<tbody>
<tr>
<td>Accommodation and Food Services</td>
<td>92%</td>
<td>42%</td>
<td>100%</td>
<td>25%</td>
<td>67%</td>
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<tr>
<td>Arts, Entertainment, and Recreation</td>
<td>41%</td>
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<td>Transportation and Warehousing</td>
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## Appendix C
Percentage of companies experiencing the following impacts to their supply chain

<table>
<thead>
<tr>
<th>Industry</th>
<th>Limited access to critical goods and services</th>
<th>Decreased demand for goods/services</th>
<th>Delay in receiving goods</th>
<th>Access to or exhaustion of credit</th>
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<td>Accommodation and Food Services</td>
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<td>38%</td>
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