



# Special Committee on Economic Recovery

**Eric Stafford**

**Vice President of Government Affairs**

**Kansas Chamber of Commerce**

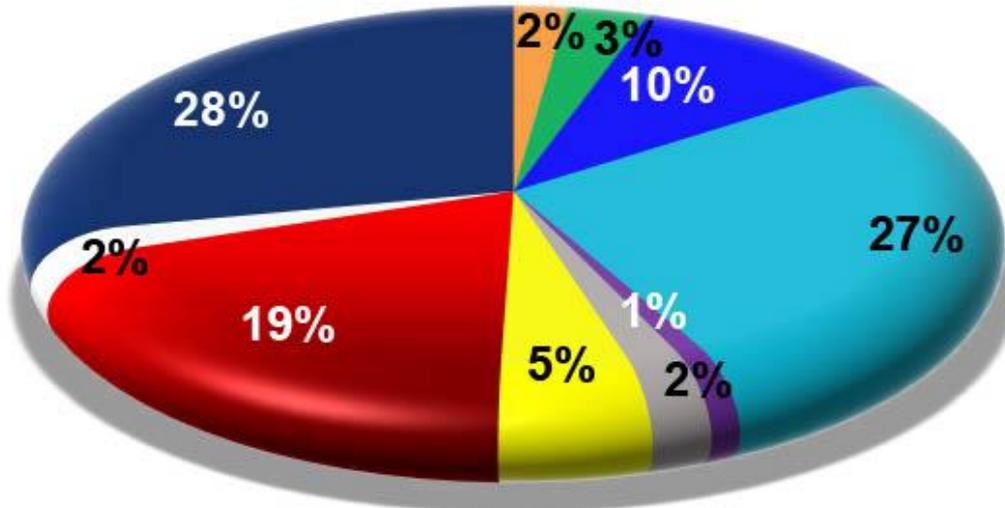
**August 13, 2020**

# COVID-19 Poll Results

- Conducted by CHS & Associates March 30-April 7
- Surveyed Kansas Chamber members regarding COVID impact and government response.
- Second survey conducted April 16-18.

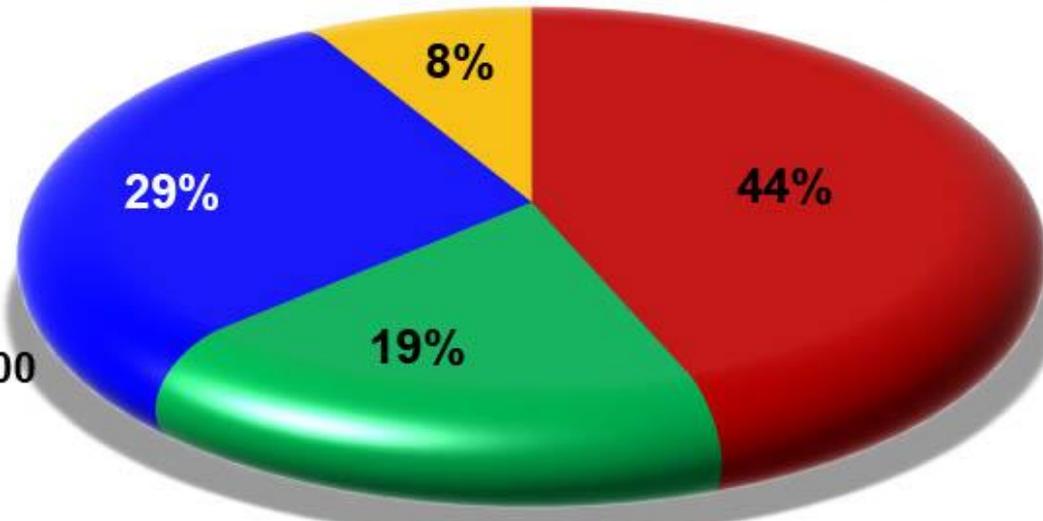
# Demographics

## Industry



-  Agriculture
-  Mining
-  Construction
-  Manufacturing
-  Transportation
-  Utilities
-  Retail
-  Professional Services
-  Health / Education
-  Other / Unclassified

-  Less Than 25
-  25 to 100
-  100 to 1000
-  More Than 1000



This information is from the Kansas Chamber file and was not asked of respondents.

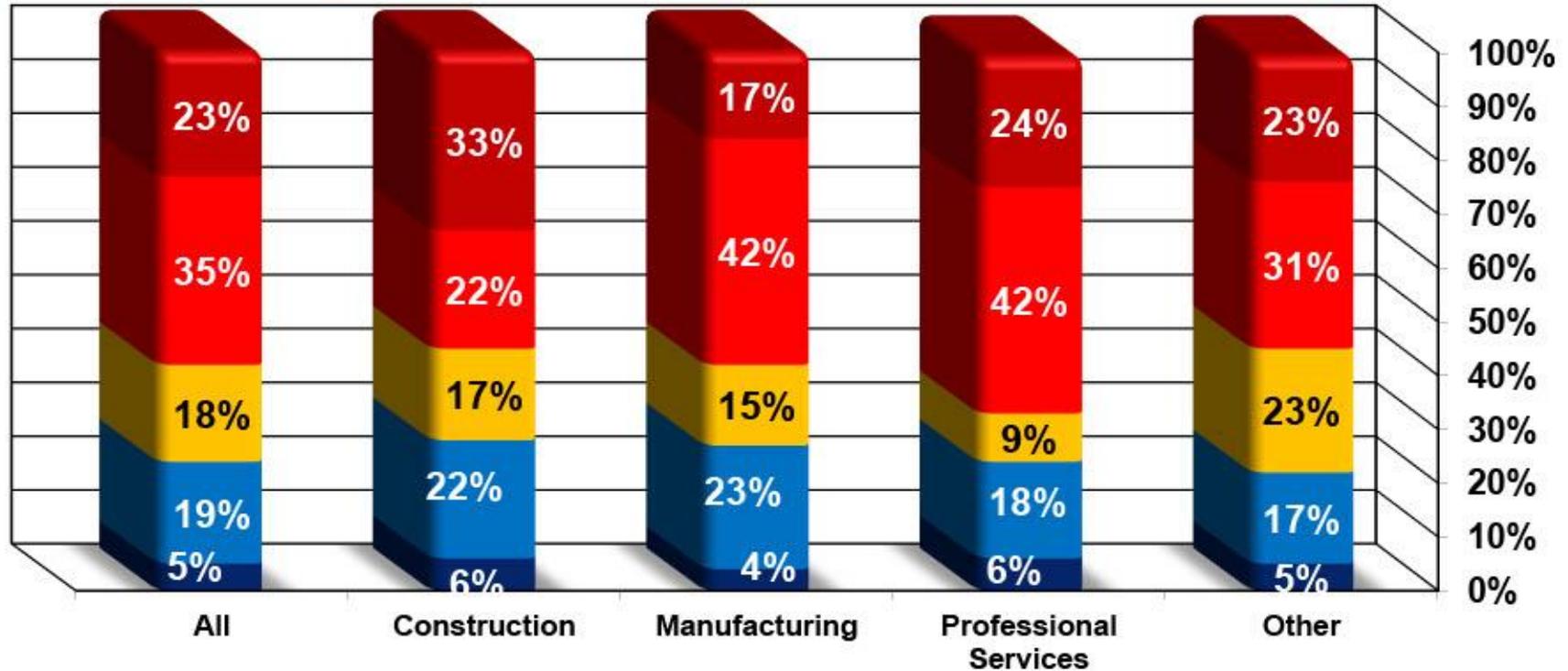
## Full Time Employees

\* Percentages may not add to 100% due to refusals and / or rounding.

# Effect of COVID-19 on Business?

5% Greatly Helped; 19% Somewhat Helped; 18% Had No Effect;  
35% Somewhat Hurt; 23% Greatly Hurt

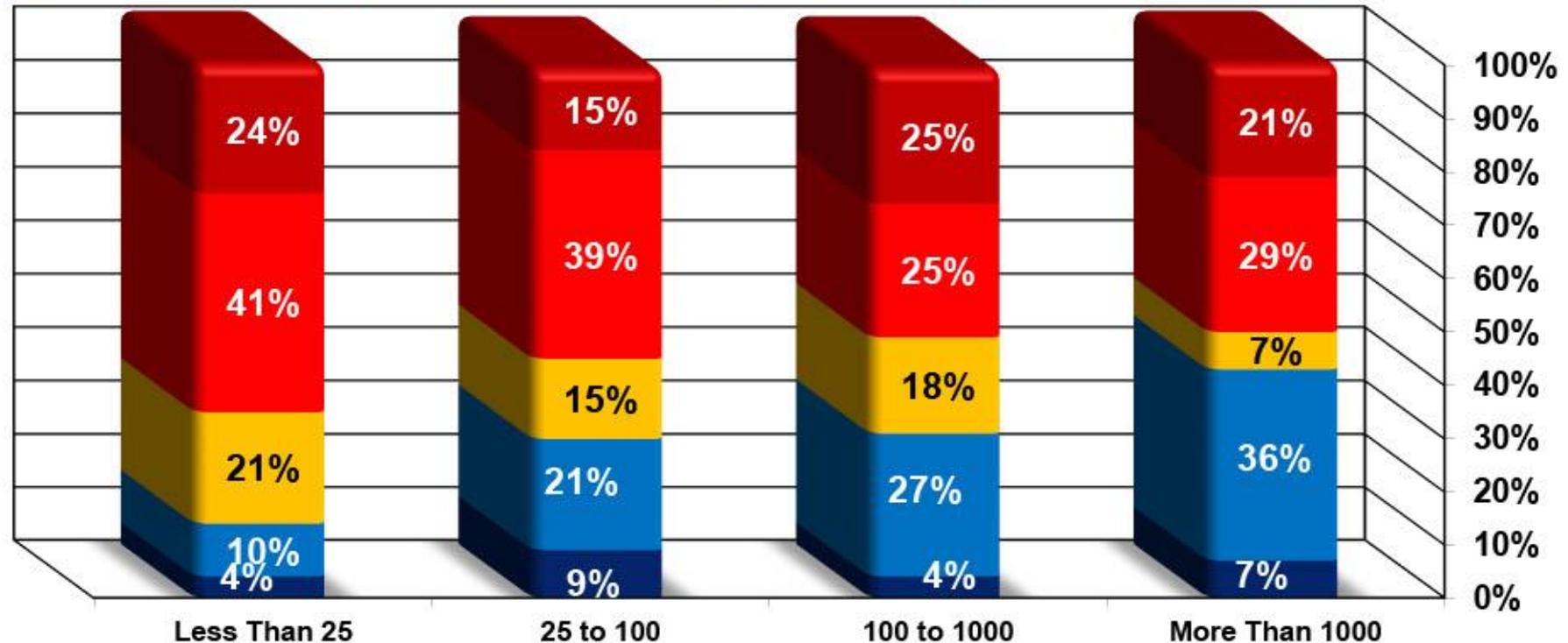
■ Greatly Helped ■ Somewhat Helped ■ No Effect ■ Somewhat Hurt ■ Greatly Hurt



**58% of chamber members have seen their business hurt by Covid-19 and the government response. This increases to 66% among those in professional services. The open-ended question reveals that a significant number of those saying it has helped their business are referring to new government programs.**

# Effect of COVID-19 on Business?- By Employees

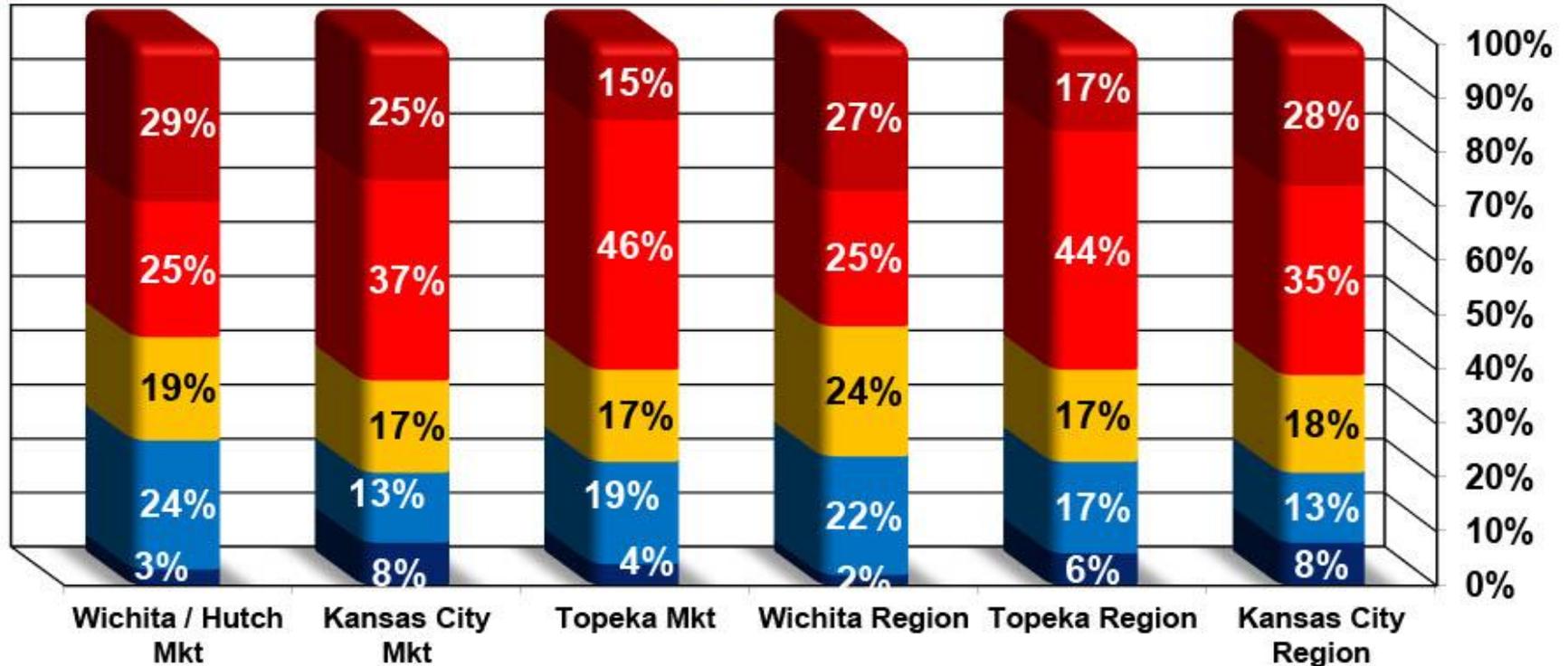
■ Greatly Helped ■ Somewhat Helped ■ No Effect ■ Somewhat Hurt ■ Greatly Hurt



Those with fewer employees have been the most hurt – but the number reaches at least 50% even among the larger companies.

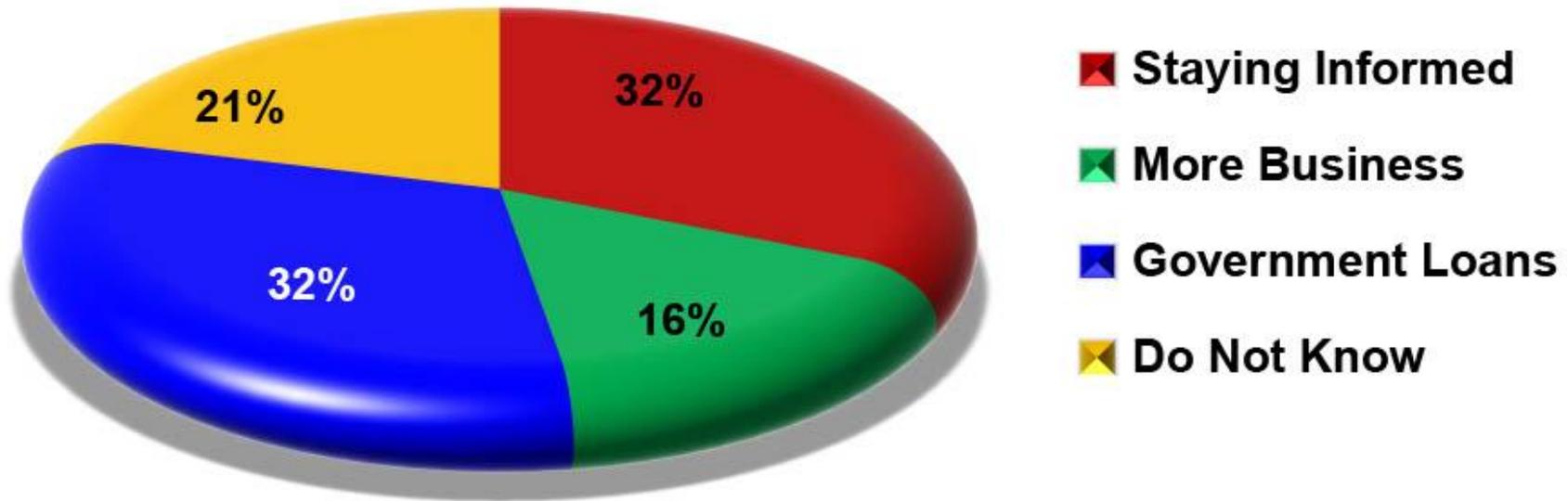
# Effect of COVID-19 on Business?- By Region

■ Greatly Helped 
 ■ Somewhat Helped 
 ■ No Effect 
 ■ Somewhat Hurt 
 ■ Greatly Hurt



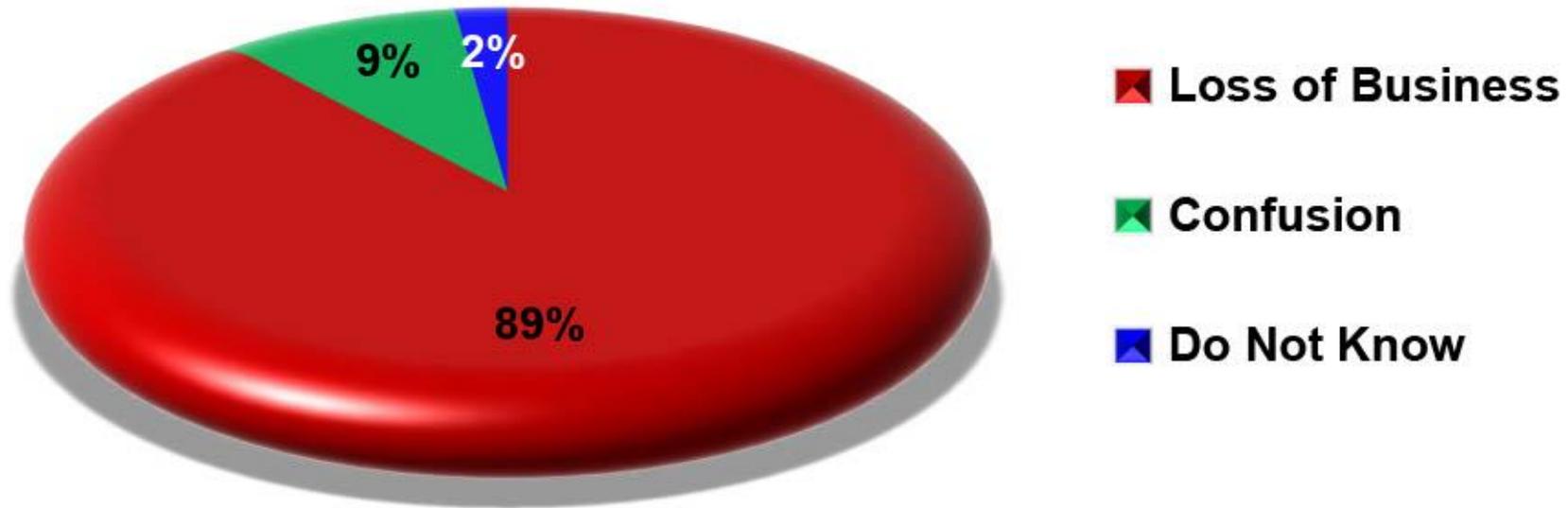
Geographically, Sedgwick and the surrounding counties appear to be a little less affected than the rest of the state.

# How Has COVID-19 Helped Business



**Only one in six of the 24% who say Covid-19 has helped their company indicate it has created more business for them. This would be only 4% of the entire universe. Two-thirds (or 16% of all businesses) say that having information or government loans has been a benefit.**

# How Has COVID-19 Hurt Business



**Among the 58% of businesses suffering due to Covid-19, the loss of business is the overwhelming reason. That being said, the 9% who mention confusion over items like the definition of “essential business” exceeds in raw numbers those who say they have been helped by increased business.**

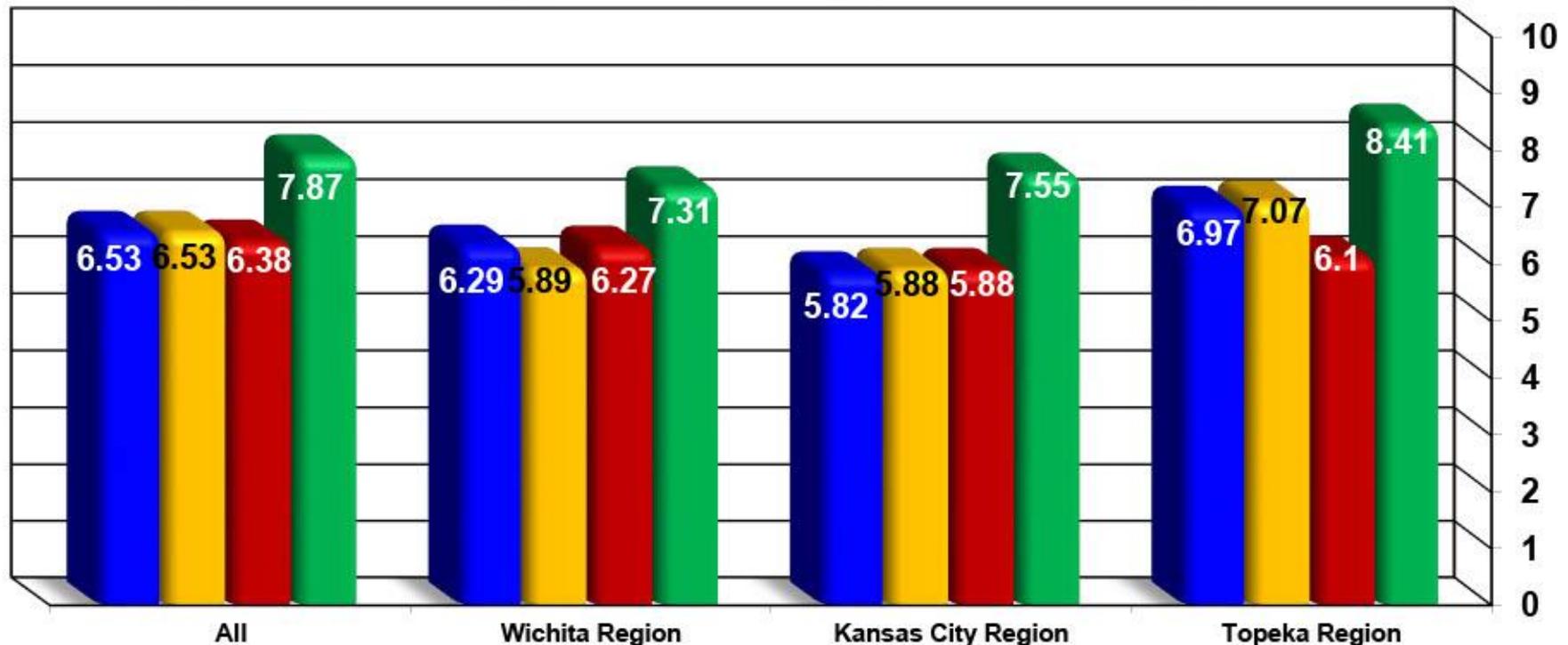
# Response Rating?

**Federal**

**State**

**Local**

**Chamber**



**Of the entities tested, the response of the Kansas Chamber is rated the best. Those in KC are more critical of governments while those in Topeka are the most positive – especially when it comes to state government response.**

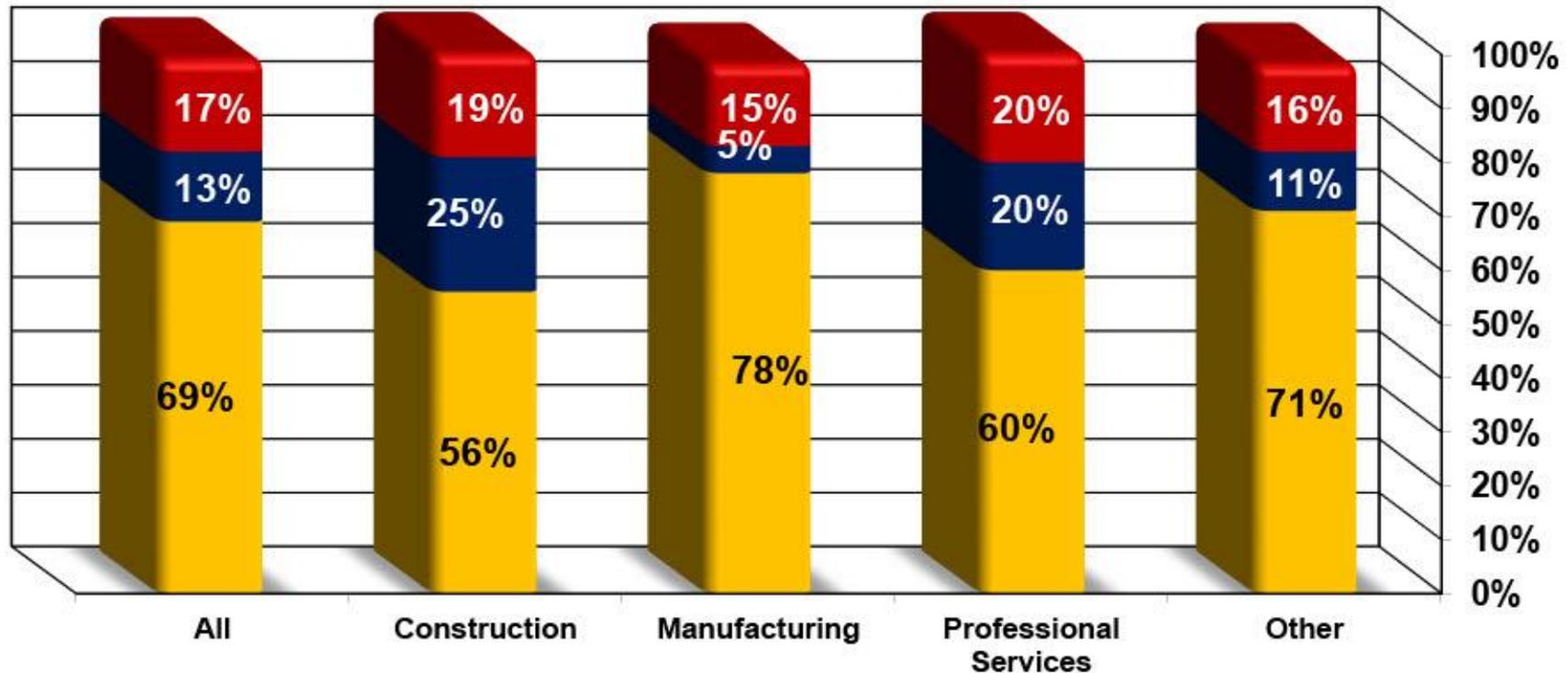
# Stance on Federal Gov't Response to COVID-19?

69% Approach is Appropriate; 13% Needs More Crack-Down;  
17% Cracked-Down Too Much; 1% Undecided

■ Appropriate

■ More Crack-Down

■ Too Much Crack-Down



Chamber members largely embrace the approach taken by the federal government to date. Almost equal numbers believe the response should be more restrictive (13%) as believe it should be less (17%). In manufacturing, three-times as many think there has been too many restrictions as too few, but still 78% are supportive of what has been done.

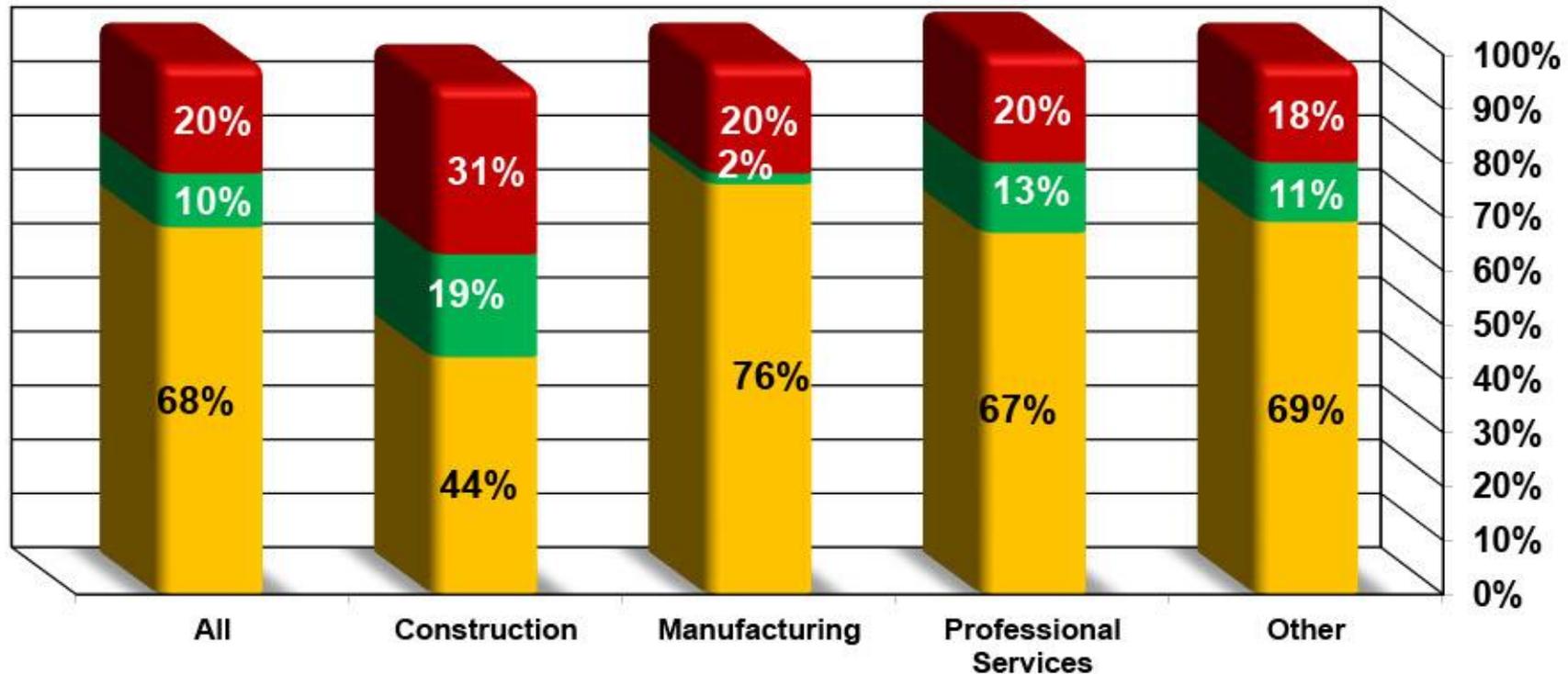
# Stance on Kansas Gov't Response to COVID-19?

68% Approach is Appropriate; 10% Needs More Crack-Down;  
20% Cracked-Down Too Much; 2% Undecided

■ Appropriate

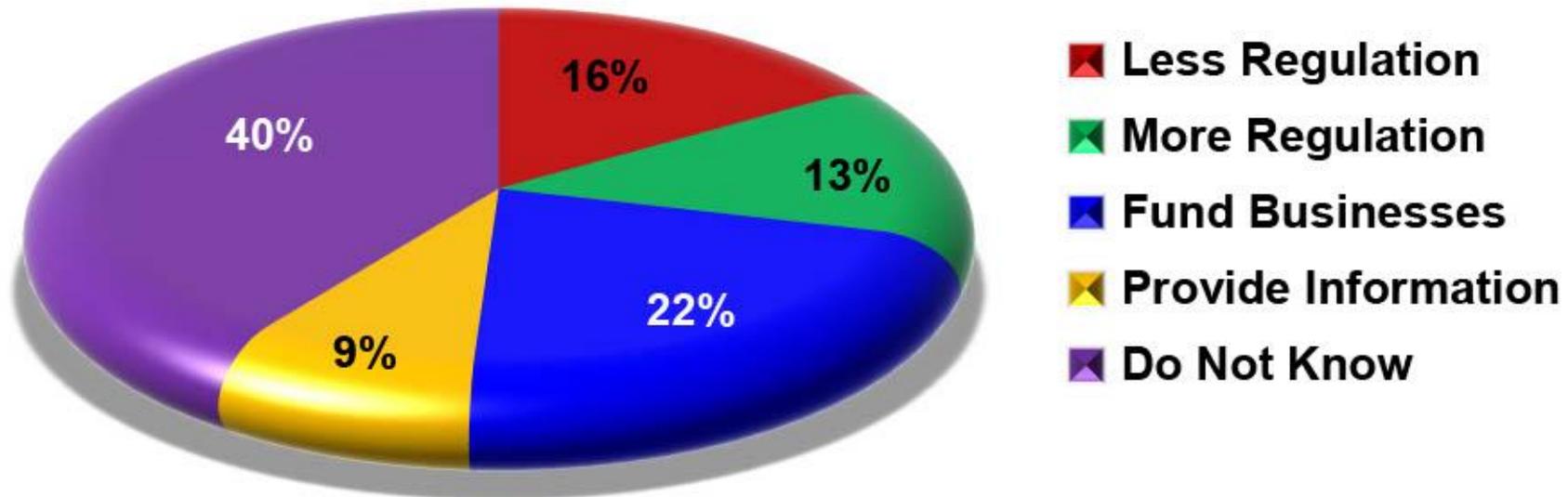
■ More Crack-Down

■ Too Much Crack-Down



When it comes to Kansas government, while we still see the vast majority thinking the response has been appropriate, those who think it has gone too far double those who think it needs to go further. Almost a third of those in the construction sector say the state government has gone too far.

# What Should Kansas Do to Help State Recover?



**Most are unable to respond to this question.**

# COVID-19 Poll Results

Second survey conducted April 16-18, two weeks later

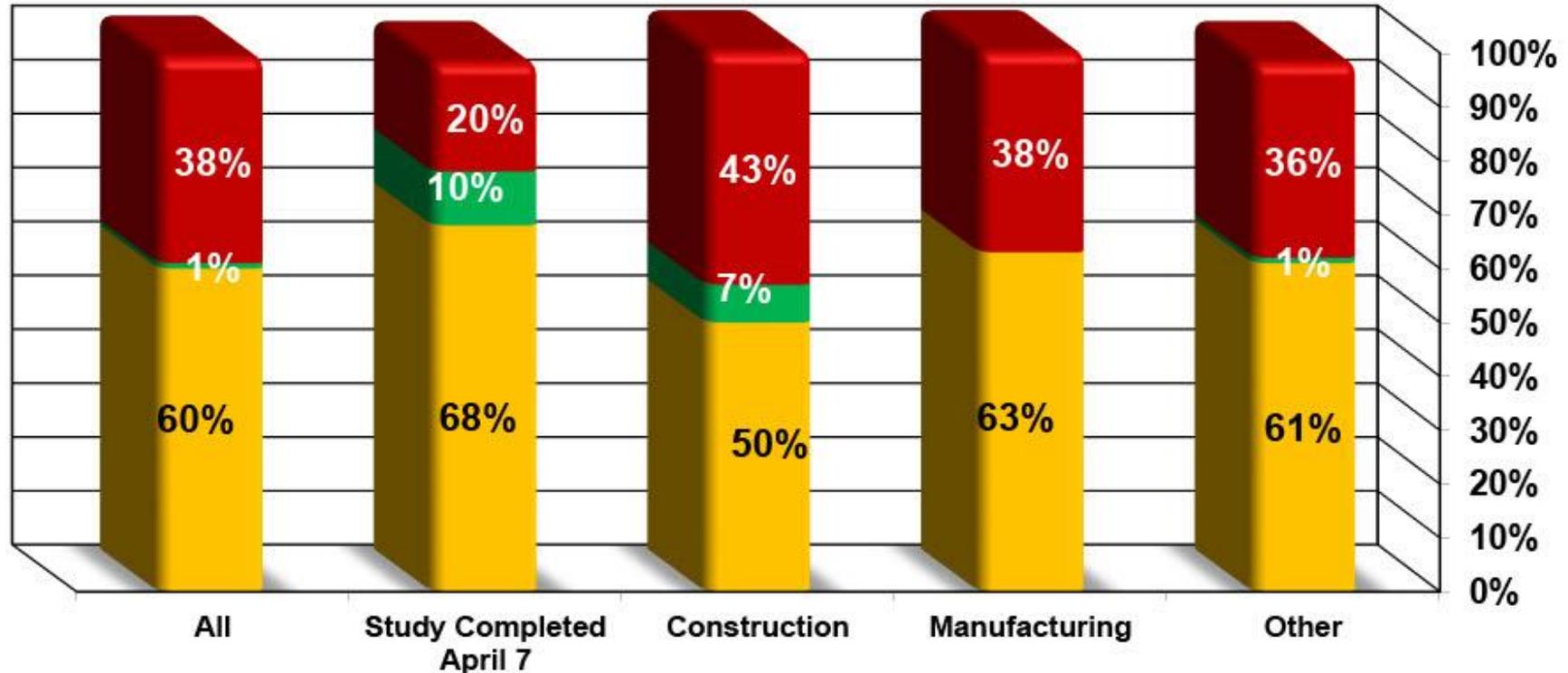
# Stance on Kansas Gov't Response to COVID-19?

60% Approach is Appropriate; 1% Needs More Crack-Down;  
38% Cracked-Down Too Much; 1% Undecided

■ Appropriate

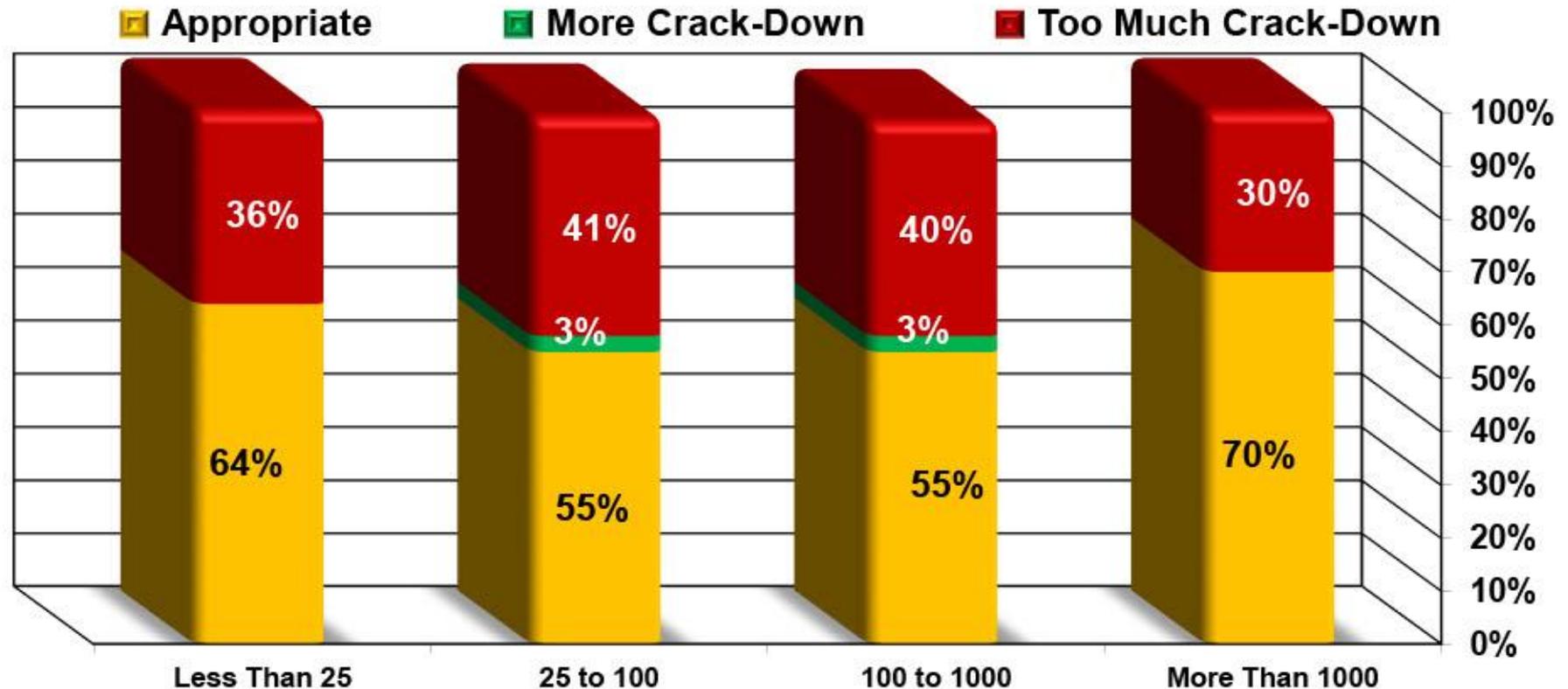
■ More Crack-Down

■ Too Much Crack-Down



We see dramatic movement in the last 10 days. We no longer see a significant number of members wanting greater restrictions and those thinking things have gone too far has doubled.

# Kansas Gov't Response to COVID-19?- By Employees



The desire to rollback restrictions is strongest among those with between 25 and 1000 employees.

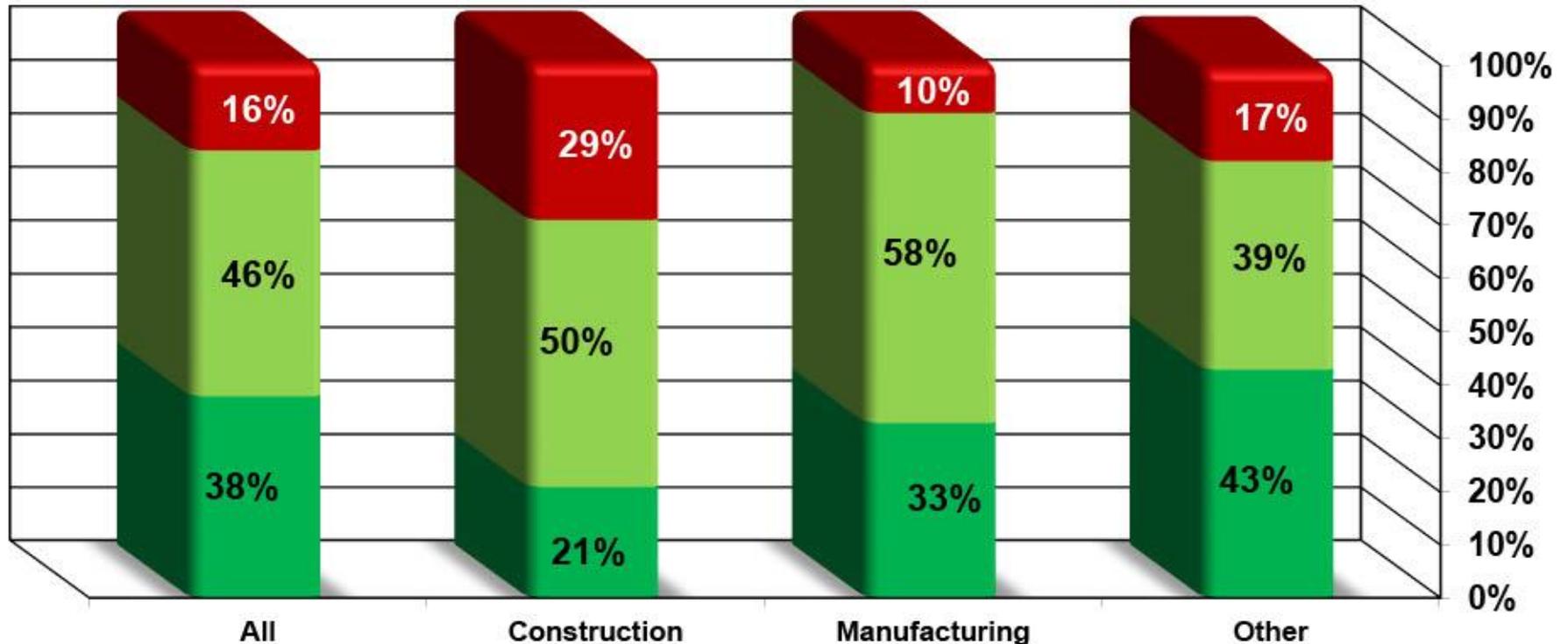
# Stance on Reopening Economy?

38% Reopen Now; 46% Begin / Two Weeks; 16% Wait on Reopening;  
1% Undecided

**Reopen Now**

**Begin / Two Weeks**

**Wait to Reopen**



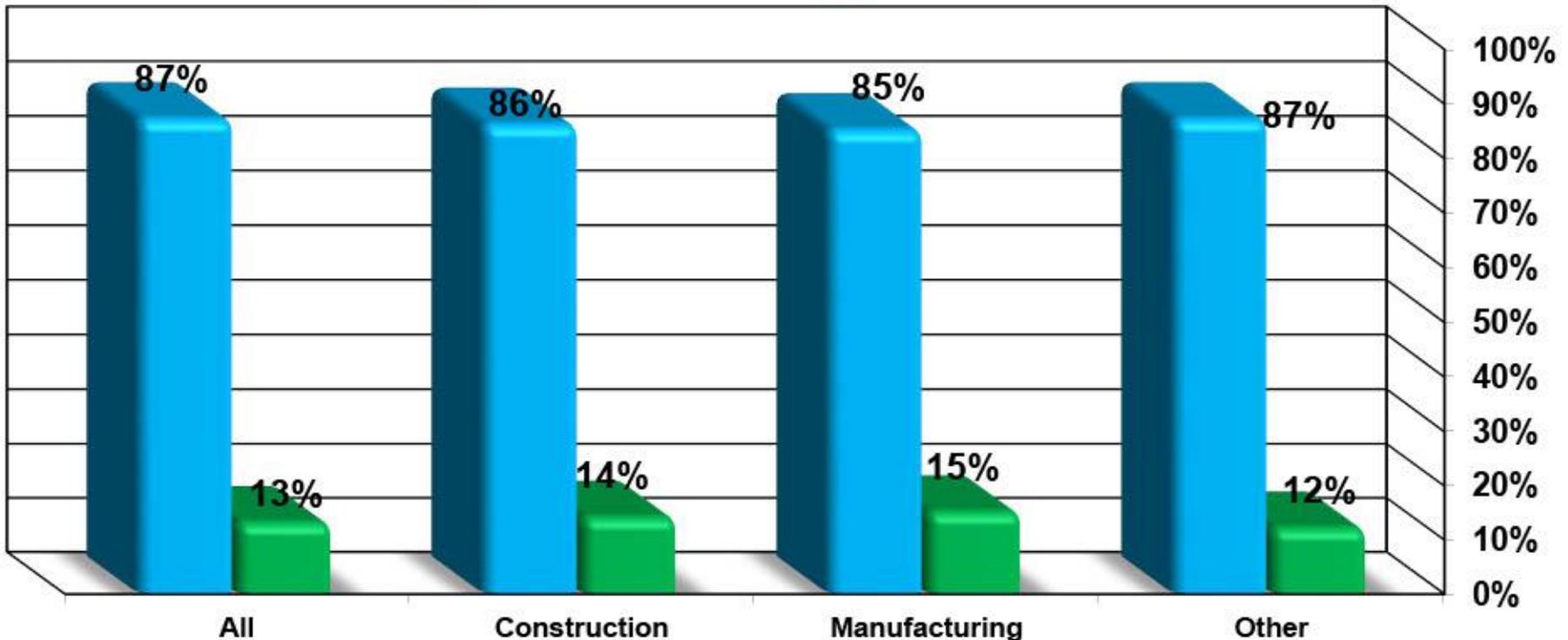
Fully 84% of chamber members think the business restrictions should start to be reduced either immediately (38%) or in the next two weeks (46%).

# Not All of Kansas Should Be Treated the Same?

87% Agree; 13% Disagree; 1% Undecided

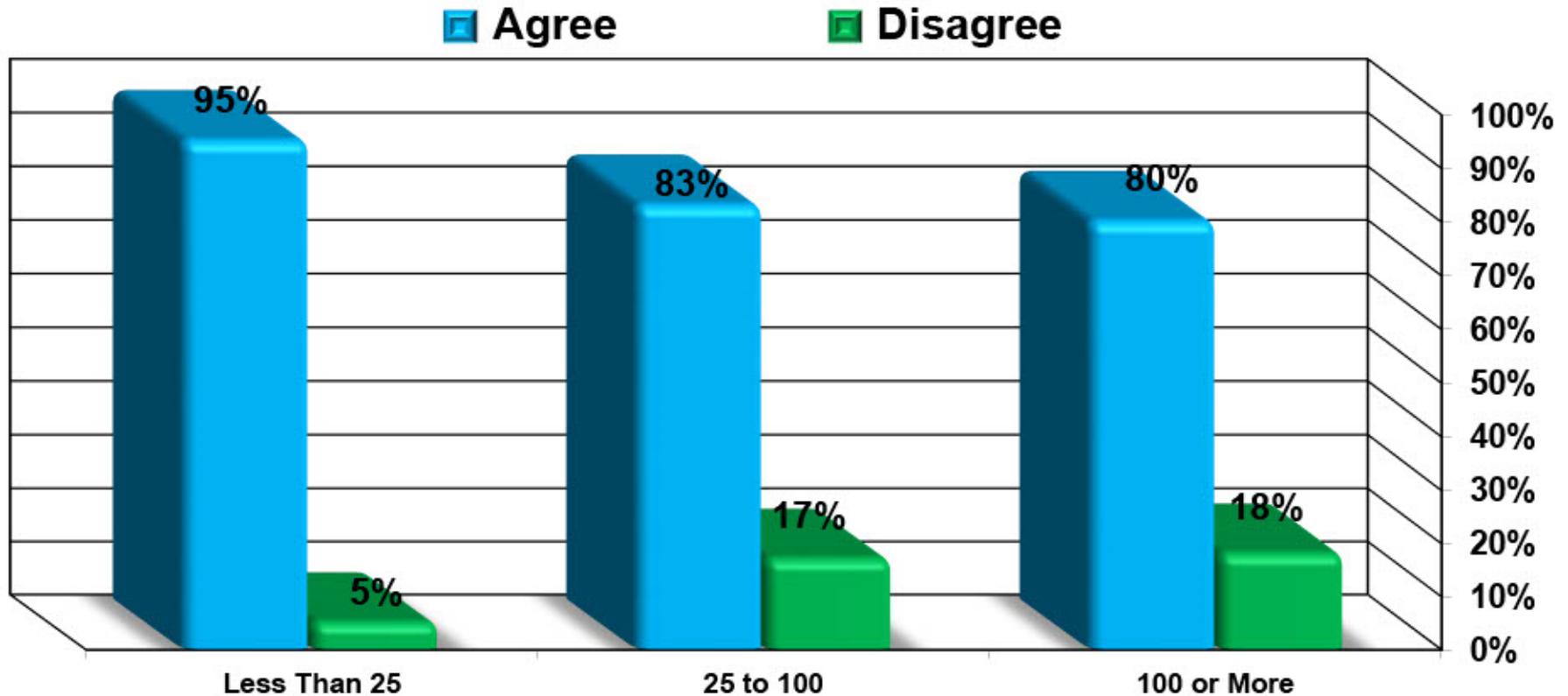
■ Agree

■ Disagree



**With near unanimity, chamber members believe that not all of Kansas should be treated the same when it comes to opening the economy.**

# Not All of Kansas Should Be Treated the Same?



**Smaller companies are the most adamant that not all parts of the state should be treated the same.**

# Statewide Survey

## 500 Registered voters

- Conducted May 14-15, 2020
- 53% Republican
- 27% Democrat
- 20% Unaffiliated
- Registered voters, not Chamber members

# Statewide Survey

## 500 Registered voters

- **Thinking about your community, which is more concerning to you?**
  - 40% The health risk related to the spread of the coronavirus
  - 54% The economic damages such as loss of employment, wages, and retirement planning related to the virus
  - 6% Undecided

# Statewide Survey

## 500 Registered voters

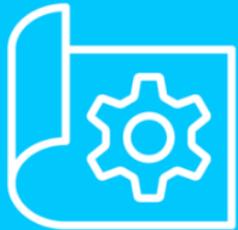
- **Which of the following comes closest to your belief?**
  - 18% The state government should strictly mandate statewide rules to keep people inside their homes and shut down additional businesses in my community so we can stop the spread of the virus.
  - 77% It is fine to loosen restrictions on businesses so people can get back to work and provide for their families as long as strict health and safety guidelines are met.
  - 5% Undecided

# COVID-19 Data Dashboard

- <https://www.kansaschamber.org/relief-recovery-dashboard/>
- We started tracking economic activity in response to COVID to help leaders understand the impact of the initial decision to shut down businesses.
- Data is broken out in three categories:
  - Consumer & Business Spending
  - Business Recovery
  - Employment & Income

# Consumer & Business Spending

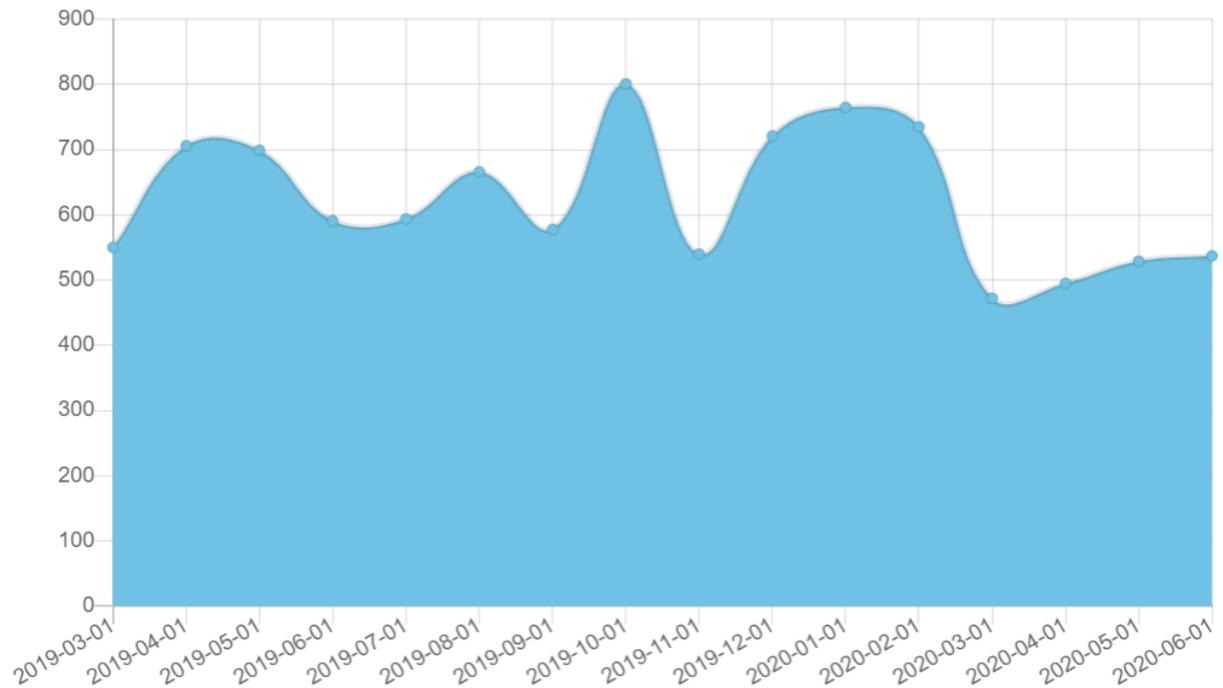
## Building Permits



**BUILDING  
PERMITS**

### Building Permit Trend

Through June, 2020 (Source: FRED)



# Consumer & Business Spending

## Retail & Food Service Sales

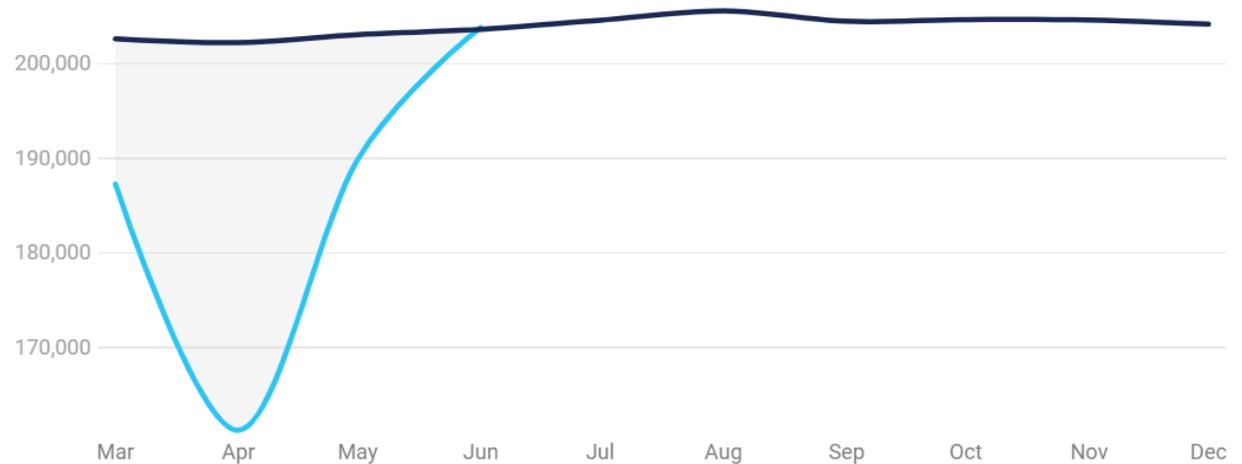


**RETAIL & FOOD  
SERVICE SALES**

### Retail and Food Service Sales

Millions of USD, 2019 vs. 2020

— 2019 — 2020



Source: Emsi • [Get the data](#) • Created with [Datawrapper](#)



# Consumer & Business Spending

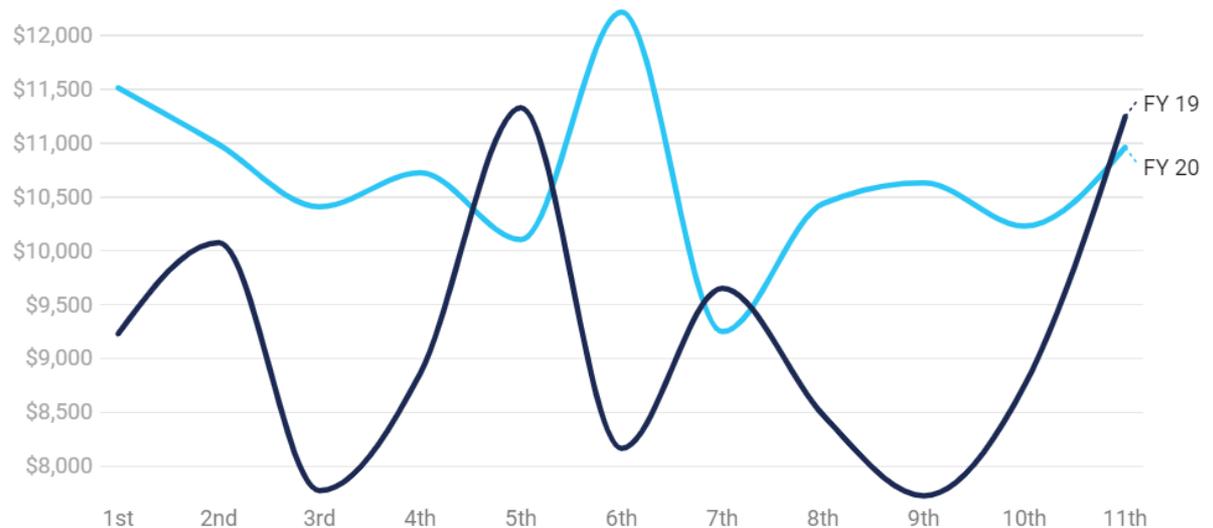
## Fuel & Sales taxes



**FUEL SALES  
& TAXES**

### Diesel Taxes (in thousands)

FY 19 vs. FY 20, 1st Month is July



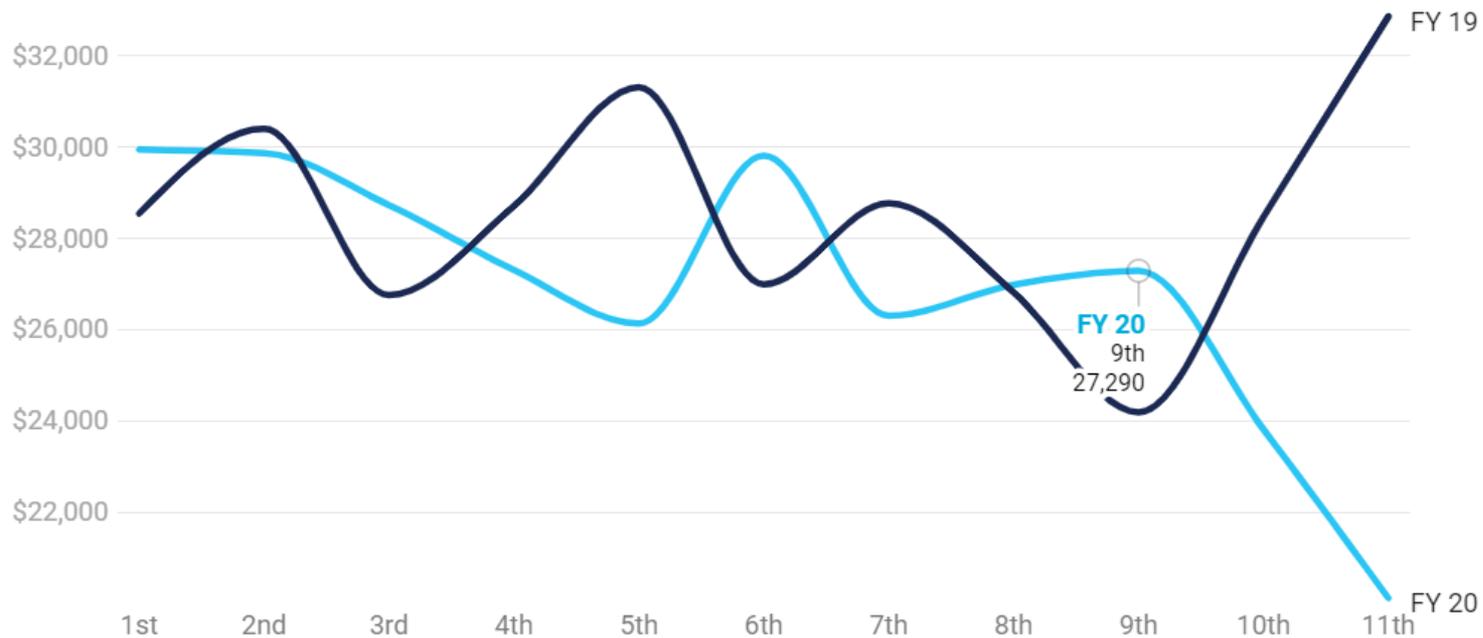
Source: KS Dept of Revenue • [Get the data](#) • Created with [Datawrapper](#)

# Consumer & Business Spending

## Fuel & Sales taxes

### Gasoline and Gasohol Taxes (in thousands)

FY 19 vs. FY 20, 1st Month is July



Source: KS Dept of Revenue • [Get the data](#) • Created with [Datawrapper](#)

# Consumer & Business Spending

## Hotels & Lodging



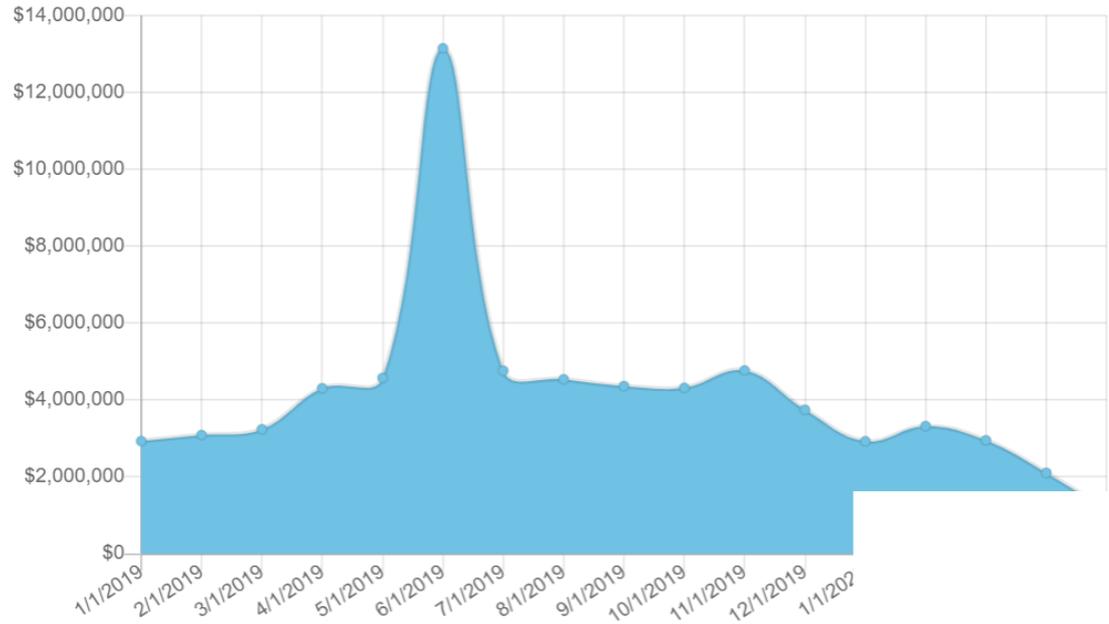
**HOTEL &  
LODGING**

**38.30%**  
Current Occupancy

**-32.30%**  
YoY Change

### Transient Guest Tax

Through March, 2020 (Source: KS Dept of Rev)



# Consumer & Business Spending

## Electricity Use



**ELECTRICITY  
USE**

### Commercial & Industrial Electricity Use

Thousands of Megawatthours

■ May 2020 ■ May 2019



Source: U.S. Energy Information Administration • [Get the data](#) • Created with [Datawrapper](#)

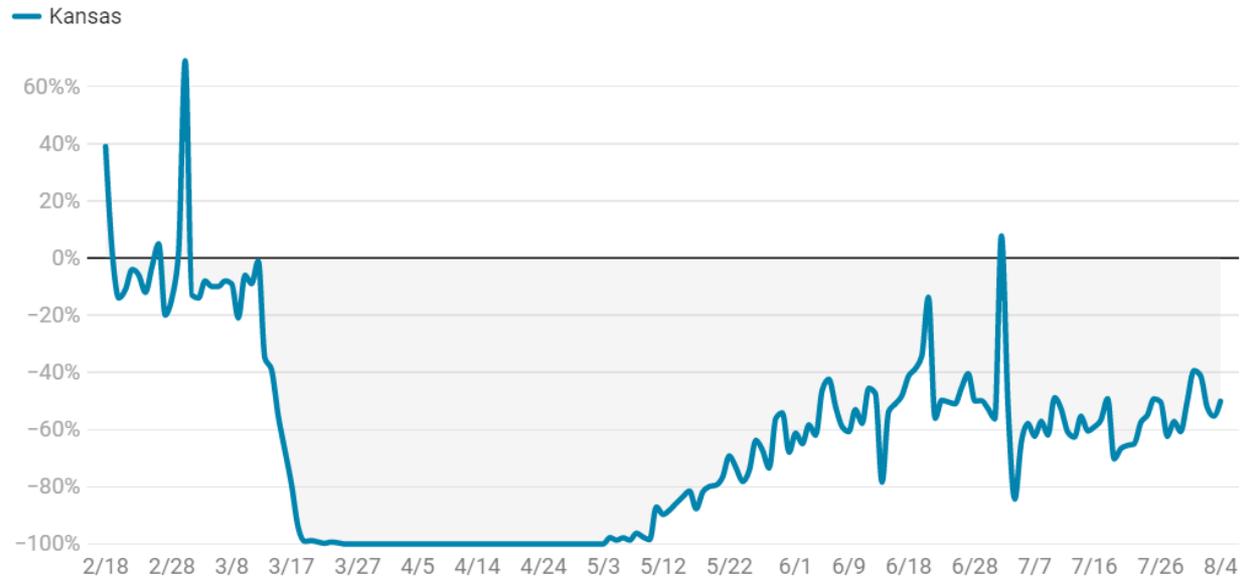
# Consumer & Business Spending

## Seated Diners in Restaurants



**SEATED DINERS  
IN RESTAURANTS**

### Seated Diners - % Change 2019 to 2020



Source: OpenTable • [Get the data](#) • Created with Datawrapper

# Business Recovery

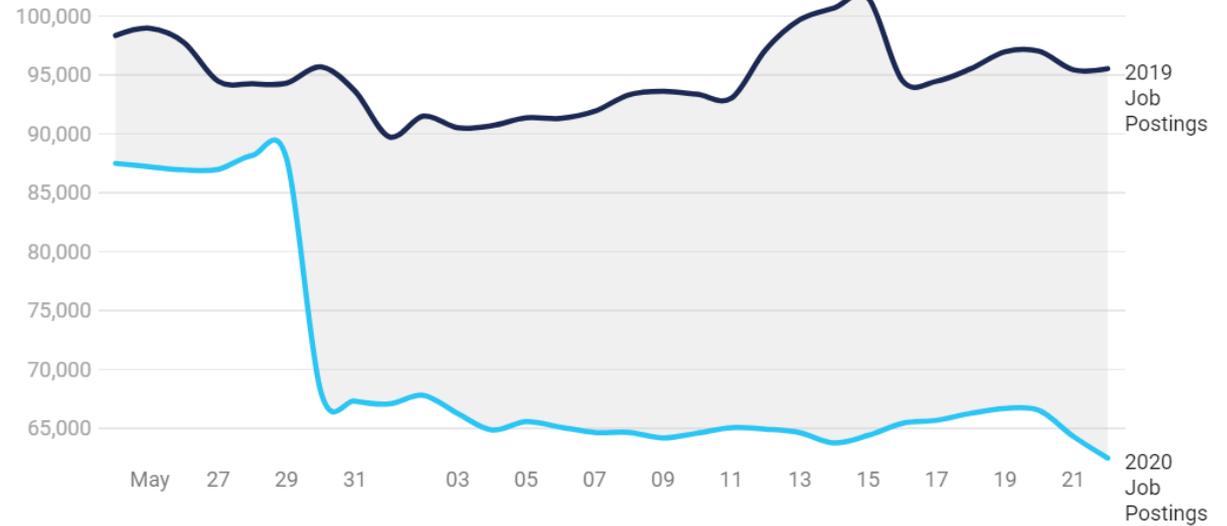
## Job Postings



**JOB POSTINGS  
ACROSS THE STATE**

### Job Posting Trend, 2019 vs. 2020

Unique job postings period comparison



Source: Emsi • [Get the data](#) • Created with [Datawrapper](#)

# Business Recovery

## Business Applications



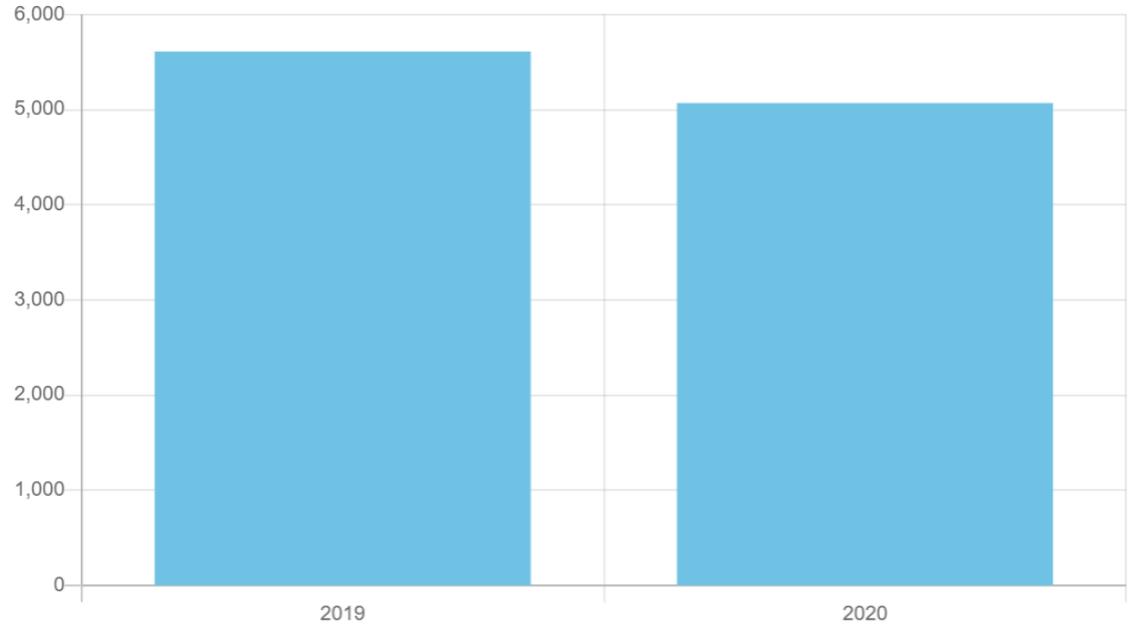
**BUSINESS  
APPLICATIONS**

**-9.64%**

Q1 2020 YoY Change

### Business Applications

Q1 2020 vs. 2019 (Source: U.S. Census)

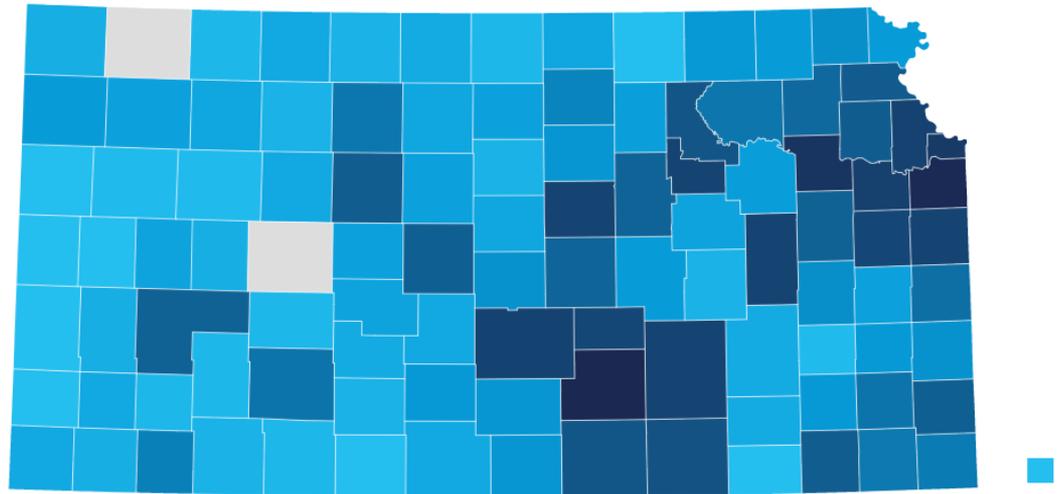


# Business Recovery Bankruptcies



## Bankruptcies by County

Hover over county to see current numbers



Source: U.S. Courts • [Get the data](#) • Created with [Datawrapper](#)

# Business Recovery

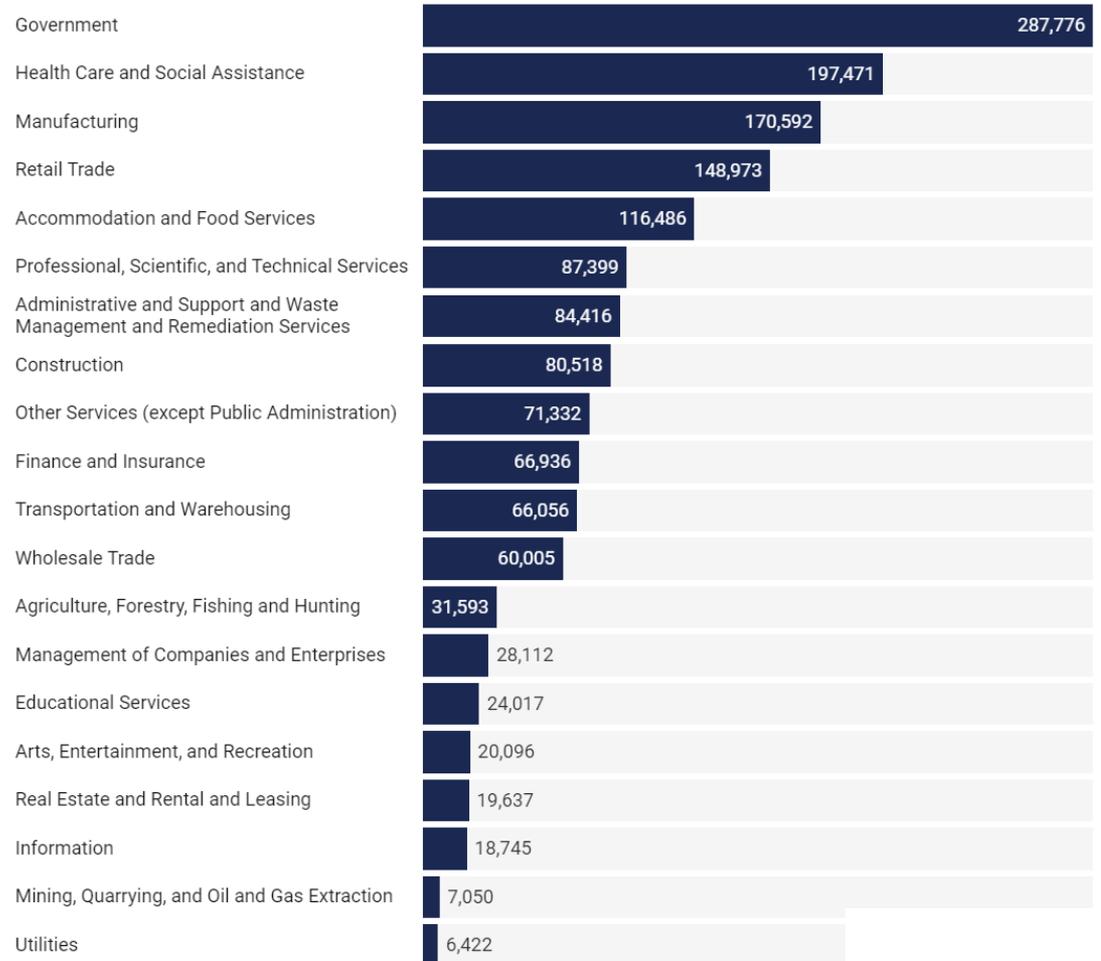
## Employment by Sector



### EMPLOYMENT BY SECTOR

#### Employment by Sector

2-digit NAICS Industries



# Employment & Income

## Unemployment Claims



**UNEMPLOYMENT  
CLAIMS**

### Initial Unemployment Claims

Through 4/25/2020 (Source: FRED)

