

Kansas City, Missouri Employer Survey

Findings Report

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2018

Submitted to the City of Kansas City, Missouri

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2018 Kansas City, Missouri Employer Survey Executive Summary

Purpose and Methodology

ETC Institute conducted the seventh annual survey of businesses for the City of Kansas City, Missouri and the Economic Development Corporation (EDC) of Kansas City during the November and December of 2018. Previous surveys have been conducted during the same time period since 2011. The purpose of the survey is to identify the importance of various issues to businesses and to identify expansion/retention plans of businesses in the future.

The survey was administered by mail and online to a sample of 4,000 establishments during November and December of 2018. A total of 413 businesses completed the survey, with at least 100 surveys being completed in each of the four geographic zones. The results for the random sample of 413 businesses have a precision of at least +/- 4.8% at the 95% level of confidence.

This report contains:

- An executive summary of the methodology for administering the survey and major findings,
- charts depicting the overall results of the survey,
- importance-satisfaction analysis used to determine priority actions for the City,
- GIS maps showing the results of selected survey questions as a map of the City,
- tables that show the results of the survey,
- a copy of the survey instrument.

Respondent Profile

Business Sector: Respondents were asked to indicate, from a list of 21 possible descriptors, which one best describes their business/organization's sector. ETC Institute then reorganized the 21 possible descriptors into seven broader categories that would allow the responses based on sector type to be analyzed side by side in a meaningful way. Each of the seven categories that were developed include enough respondents to ensure the responses by sector are significant. Twenty-five percent (25%) of respondents indicated their business is in supply chain management sector, 10% are in the health sciences and services sector, 7% are in the specialized manufacturing sector, 8% are in the financial and technical services sector, 7% are in the arts sector, 7% are in the non-profit management sector, and the remaining 29% of respondents were grouped into a category titled other.

Length of Time Business has been Located in Kansas City, Missouri: Respondents were asked to indicate how many years their business/organization has been located in Kansas City, Missouri. Sixty-five percent (65%) indicated they have been in Kansas City, Missouri for 21 or more years, 19% have been in Kansas City, Missouri between 11 and 20 years, 9% have been in Kansas City,

Missouri between 6 and 10 years, 3% have been in Kansas City, Missouri between 3 and 5 years, 2% have been in Kansas City, Missouri between 1 and 2 years, 1% have been in Kansas City, Missouri for less than one year, and 1% of respondents did not provide a response to this question.

Lease or Own Facility: Respondents were asked to indicate whether they lease or own their facility. Fifty-eight percent (58%) of respondents indicated they own their facility, 40% lease, and 2% did not provide a response to this question.

Number of Employees: Respondents were asked to indicate how many employees their organization employees at the location where the survey was received. Forty-one percent (41%) of respondents indicated they have fewer than 10 employees, 28% have between 10 and 24 employees, 16% have between 25 and 49 employees, 8% have between 50 and 99 employees, 6% have 100 or more employees, and less than 1% did not provide a response to this question. Seventy-three percent (73%) of respondents indicated their business/organization does not have employees at other locations in the metropolitan Kansas City area.

Local Business/Trade Association Affiliation: Respondents were asked to indicate whether their business/organization is currently a member of a local business/trade association. Forty-four percent (44%) of respondents indicated their business is currently a part of a local business/trade association, 51% are not a part of a local business/trade association, and 5% did not provide a response to this question.

Anticipated Organizational Change Over the Next Three Years: Half of respondents (50%) indicated their business/organization does not plan to take any of the actions listed over the next three years.

Twenty-seven (27%) of respondents indicated they were planning to increase employment over the next three years. Of those who planned to increase employment 62% anticipate hiring five or fewer employees, 11% plan to hire between 6 and 10 new employees, 15% plan to hire between 11 and 20 new employees, 8% plan to hire between 21 and 30 new employees, and 2% plan to hire 31 or more new employees over the next three years. The average salary of the new employees anticipate hiring over the three years is \$25.65 which is over \$7.00 more than the 2018 average of \$18.04. Only 2% of respondents indicated they anticipate decreasing employment over the next three years. Of those who plan to decrease employment 57% plan to layoff between 1 and 4 employees, and 43% plan to layoff 10 or more employees over the next three years.

Twenty-five percent (25%) of respondents indicated they plan on expanding/renovating their facility in its current location over the next three years. Nine percent (9%) of respondents plan to relocate to another location in Kansas City, Missouri over the next three years, 6% plan to relocate outside of Kansas City, Missouri, and 1 % plan to close within the next three years. In 2017 the number of respondents who indicated they plan to close their business/organization over the past three years was 4%.

Major Findings

Perceptions of Doing Business in the City of Kansas City, Missouri: Overall, 68% of respondents indicated the City of Kansas City, Missouri is either an “excellent” (23%) or “good” (45%) place to do business. When asked to rate their satisfaction with various perceptions of the City, 70% were either “very satisfied” or “satisfied” with the overall quality of life in the City. Seventy-two percent (72%) of respondents were satisfied with the overall image of the City, and 67% were satisfied with the quality of new development in the City. Respondents were least satisfied with the overall quality of the education system within the City (18%).

Reasons to do Business in the City of Kansas City, Missouri: Respondents were asked to indicate how important various reasons were to their decision to keep their business in the City of Kansas City Missouri. Eighty-five percent (85%) of respondents indicated the availability of telecommunications, utilities, and other infrastructure was either “extremely important” or “very important” to their decision to locate their business in Kansas City. Other reasons that were viewed as “extremely important” or “very important” include: the attitude of local government towards business (78%), the low crime rate (75%), and the availability of trained employees (70%).

Rating City Services, Departments, and Programs: Respondents were asked to indicate whether their business has used 23 various services during the past two years. Respondents who indicated they had used a particular service were then asked to indicate how satisfied they are with the service. Ninety-six percent (96%) of respondents indicated they were either “very satisfied” or “satisfied” with fire incident response, 90% were satisfied with ambulance-medical emergency response, 86% were satisfied with fire inspection, 84% were satisfied with the KC Streetcar, 76% were satisfied with health inspections, 74% were satisfied with KCATA bus service, 72% were satisfied with police-crime/safety response, and 65% were satisfied with business licensing. Police-crime/safety response (40%), street maintenance (20%), water services (18%), and business licensing (16%) are the four most important city departments or programs to businesses.

Rating the Workforce: Seventy-six percent (76%) of respondents rated Kansas City as an “excellent” or “good” place to work. Respondents were least satisfied with the availability of workers (44%), the education/technical skill of workers (44%), the quality of workers (46%), and the stability of workers (47%). The quality of workers is the workforce issue that is most important to the respondent’s decision to stay in Kansas City, Missouri.

Awareness and Use of Business Assistance Programs: Respondents were asked to indicate whether they were aware of and have used seven various business assistance programs offered to businesses in Kansas City, Missouri. For each of the business assistance programs the respondent used they were asked to indicate their level of satisfaction with the program. Sixty-percent (60%) were aware of Metropolitan Community College and 13% have used it, 49% were aware of the Economic Development Corporation of Kansas City, Missouri and 12% have used it, 38% were aware of the Full Employment Council and 9% have used it, 19% were aware of KCSourceLink and 4% have used it, 17% were aware of KC Bizcare and 4% have used it, 10% were aware of Altcap and 1% have used it, and 8% were aware of Justine Petersen Small Business Loans and 2% have used it.

When rating their satisfaction with the business assistance programs used by respondents, 80% of respondents indicated they were either “very satisfied” or “satisfied” with Justine Petersen Small Business Loans, 75% were satisfied with Altcap, 72% were satisfied with the Economic Development Corporation of Kansas City, Missouri, 70% were satisfied with Metropolitan Community College, 58% were satisfied with KCSOURCELINK, 54% were satisfied with KC Bizcare, and 50% were satisfied with the Full Employment Council.

Respondents were also asked if they were aware of several services provided by the Economic Development Corporation of Kansas City, Missouri. Twenty-one percent (21%) of respondents indicated they were aware of pottery tax abatement, 21% were aware of tax incremented financing, 20% were aware of redevelopment incentives, 17% were aware of financing, 16% were aware of job/investment incentives, 12% were aware of training funds, 11% were aware of City service aid, 9% were aware of real estate aid, and 8% were aware of regulatory aid.

Funding: Respondents were asked to indicate the sources of funding they used for their business needs during the past five years. Most respondents (43%) indicated they used working capital as a means of funding their business, bank loans were used by 37%, personal savings were used by 19%, credit cards were used by 17%, asset backed loans were used by 10%, loans from family/friends were used by 7%, government grants/funding/incentives were used by 7%, and equity financing were used by 4%.

Additional Findings

- Twelve percent (12%) of respondents indicated their company currently sells products/services outside the United States
- Forty-eight percent (48%) of respondents indicated they prefer to get information about business assistance programs via email.
- Forty-five percent of respondents indicated their personal residence is located in Kansas City, Missouri.

Investment Priorities

Recommended Priorities for the Next Two Years. In order to help identify investment priorities for the next two years, ETC Institute conducted an Importance-Satisfaction (I-S) analysis. This analysis examined the importance respondents placed on City services and the level of satisfaction with each service. By identifying services of high importance and low satisfaction, the analysis identified which services will have the most impact on overall satisfaction with City services over the next two years. The City should prioritize investments in services with the highest Importance Satisfaction (I-S) ratings. Details regarding the methodology for the analysis are provided in Section 2 of this report.

Overall Priorities for the City by Major Category. This analysis reviewed the importance of and satisfaction with major categories of City services. This analysis was conducted to help set the

overall priorities for the City. Based on the results of this analysis, the major services that are recommended as the top priorities for investment over the next two years in order to raise overall satisfaction ratings are listed below:

- Street maintenance (IS Rating=0.1270)
- Police-crime/safety response (IS Rating=0.1126)

The table below shows the importance-satisfaction rating for all 23 major categories of City services that were rated.

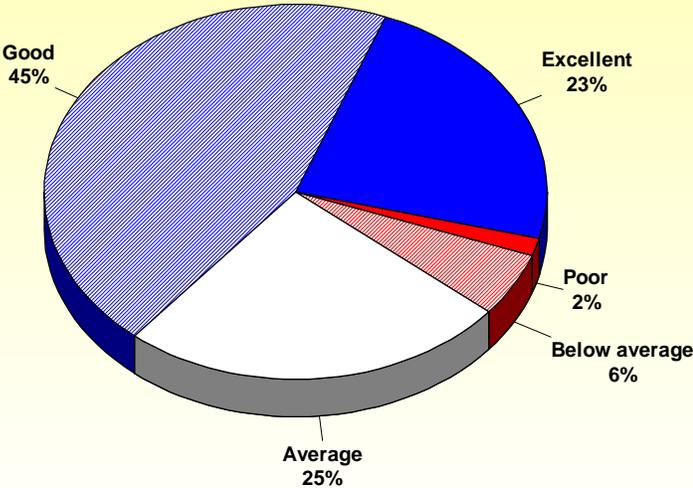
2018 Importance-Satisfaction Rating Kansas City, Missouri Employer Survey Major Categories of City Services						
Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
High Priority (IS .10-.20)						
Street maintenance	20%	2	36%	23	0.1270	1
Police-crime/safety response	40%	1	72%	7	0.1126	2
Medium Priority (IS <.10)						
Water services	18%	3	62%	10	0.0687	3
Business licensing	16%	4	65%	8	0.0570	4
Building permits	9%	8	52%	15	0.0416	5
Code enforcement	7%	13	39%	21	0.0411	6
Airport services	10%	7	60%	12	0.0395	7
Stormwater drainage	8%	10	50%	18	0.0389	8
Tax collection	8%	9	53%	14	0.0364	9
Website usefulness (kcmo.gov)	6%	16	60%	11	0.0219	10
Regulated industries licensing/inspections	6%	14	63%	9	0.0215	11
Sidewalk maintenance	3%	19	37%	22	0.0202	12
Development review	4%	18	49%	19	0.0199	13
311 call center	4%	17	57%	13	0.0177	14
Health inspections	7%	12	76%	5	0.0176	15
KCATA bus service	6%	15	73%	6	0.0149	16
Public incentives requests	2%	21	44%	20	0.0123	17
Fire inspection	8%	11	86%	3	0.0109	18
Ambulance-medical emergency response	11%	6	90%	2	0.0106	19
MBE/WBE certification	2%	22	52%	16	0.0091	20
Municipal court	2%	23	51%	17	0.0083	21
Fire incident response	12%	5	96%	1	0.0049	22
KC Streetcar	3%	20	84%	4	0.0047	23

Section 1

Charts and Graphs

Q1. How would you rate Kansas City, Missouri overall as a place to do business?

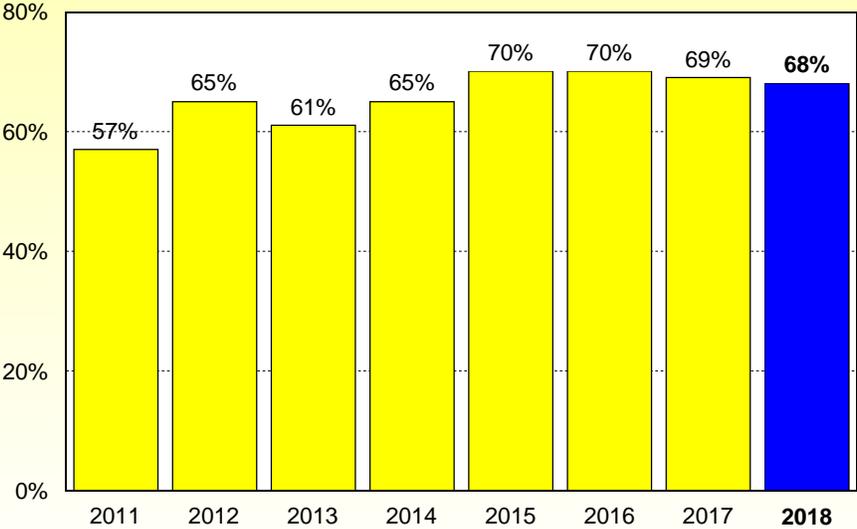
by percentage of respondents (excluding "don't know" responses)



Source: ETC Institute (2018)

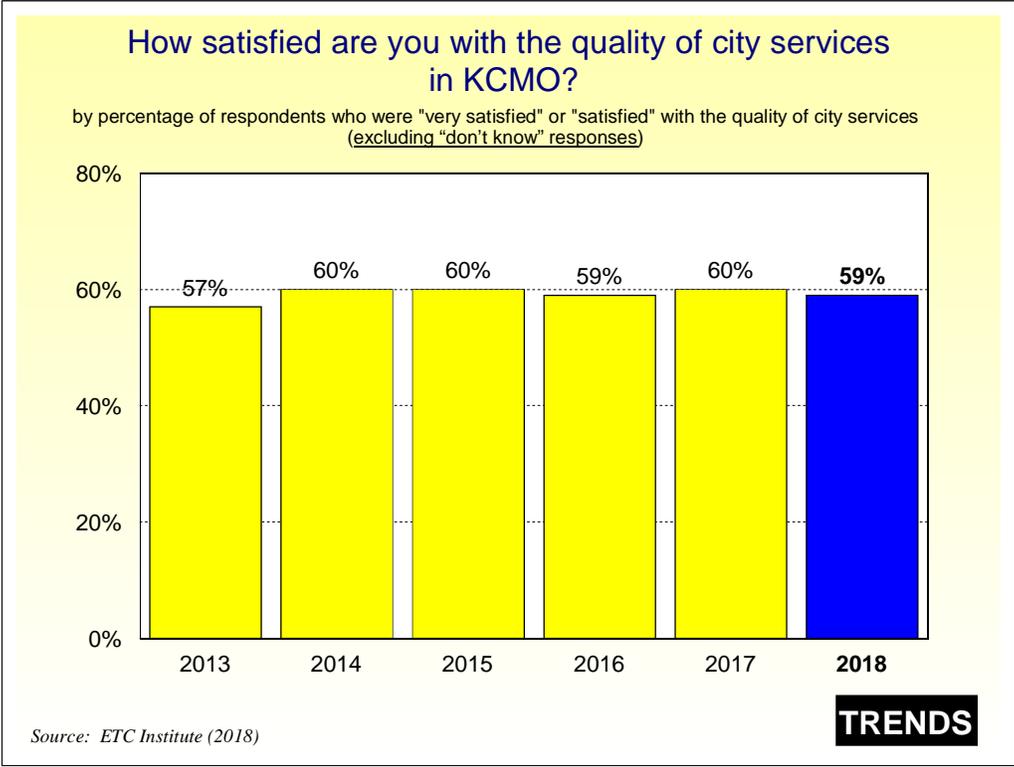
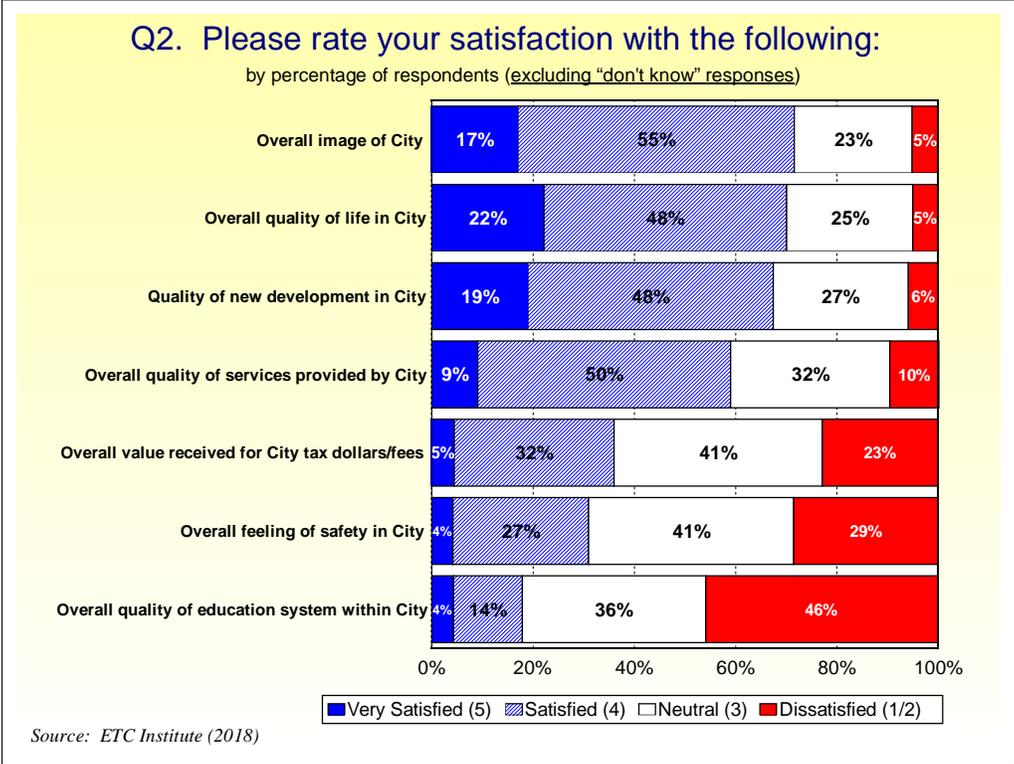
How would you rate Kansas City, Missouri overall as a place to do business?

by percentage of respondents who rated Kansas City as an "excellent" or "good" place to do business (excluding "don't know" responses)



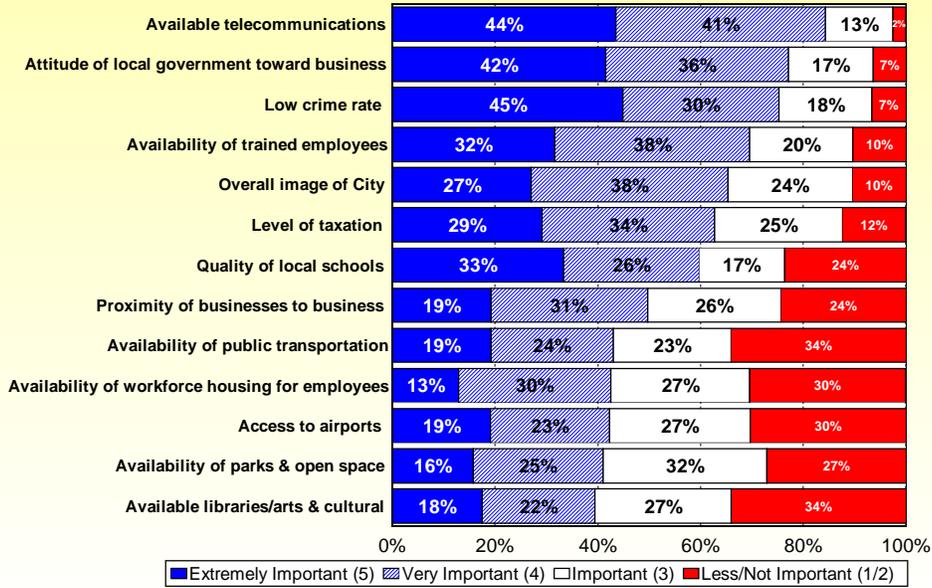
Source: ETC Institute (2018)

TRENDS



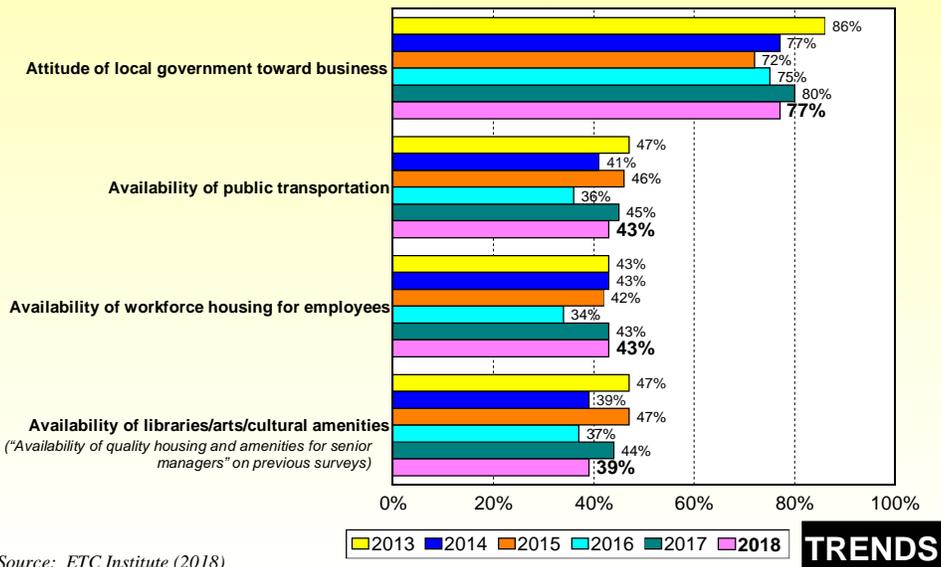
Q3. How important were each of the following reasons in your decision to locate your business in the City of Kansas City?

by percentage of respondents (excluding "don't know" responses)



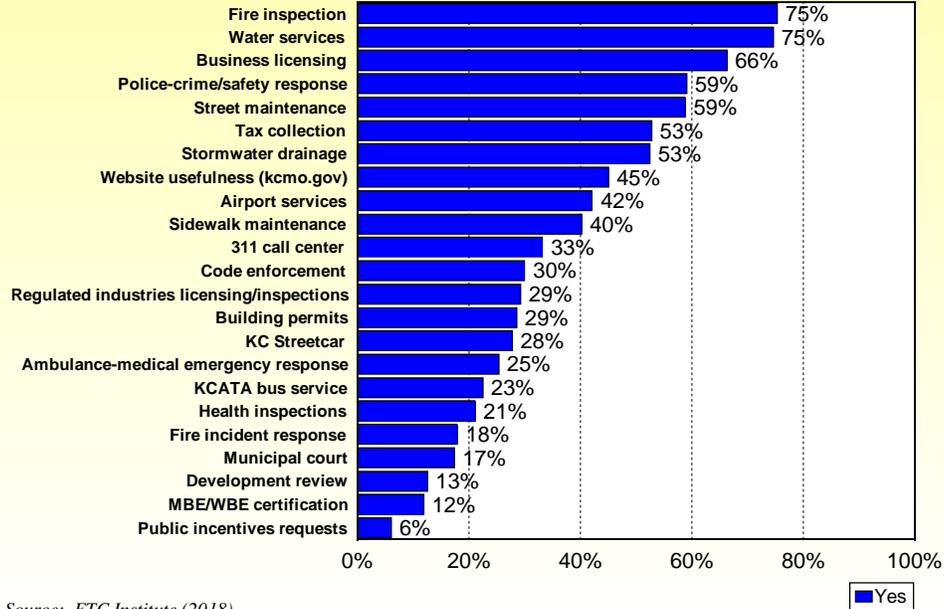
How important were each of the following reasons in your decision to locate your business in the City of Kansas City? 2013 to 2018

by percentage of respondents who indicated the reason was "extremely important" or "very important" (excluding "not provided" responses)



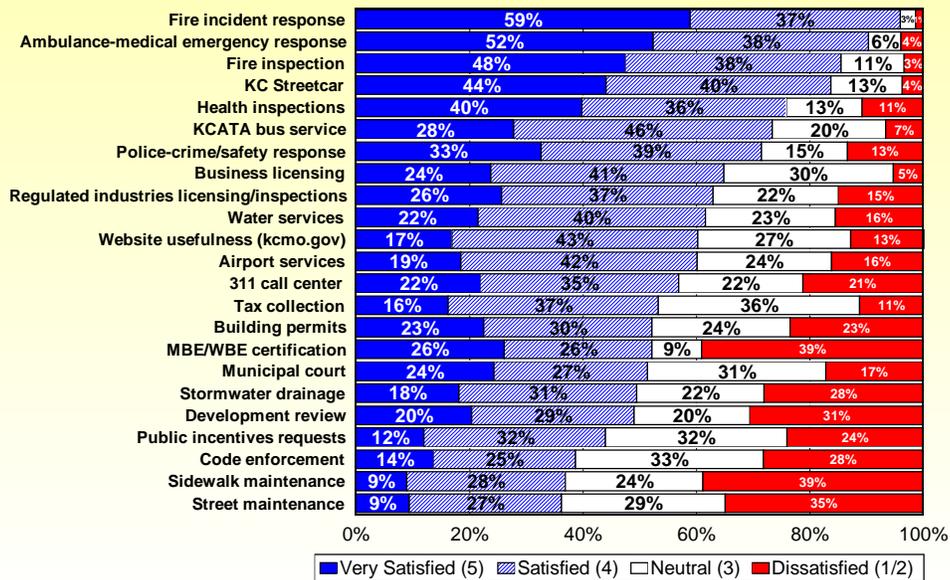
Q4. Has your business used these services over the past 2 years?

by percentage of respondents who answered "yes"



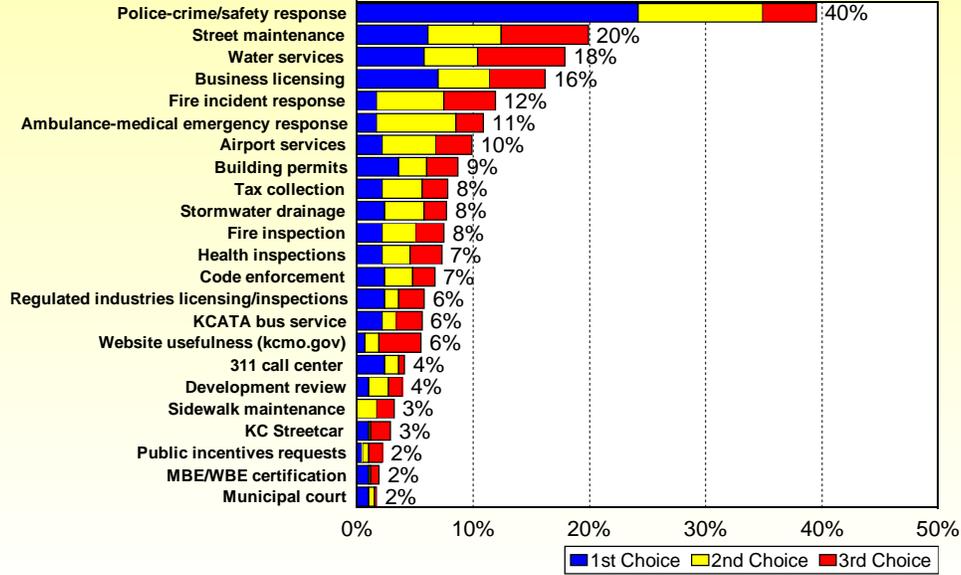
Q4. Please rate your satisfaction with the following City services:

by percentage of respondents who indicated that they have used the service over the past 2 years (excluding "don't know" responses)



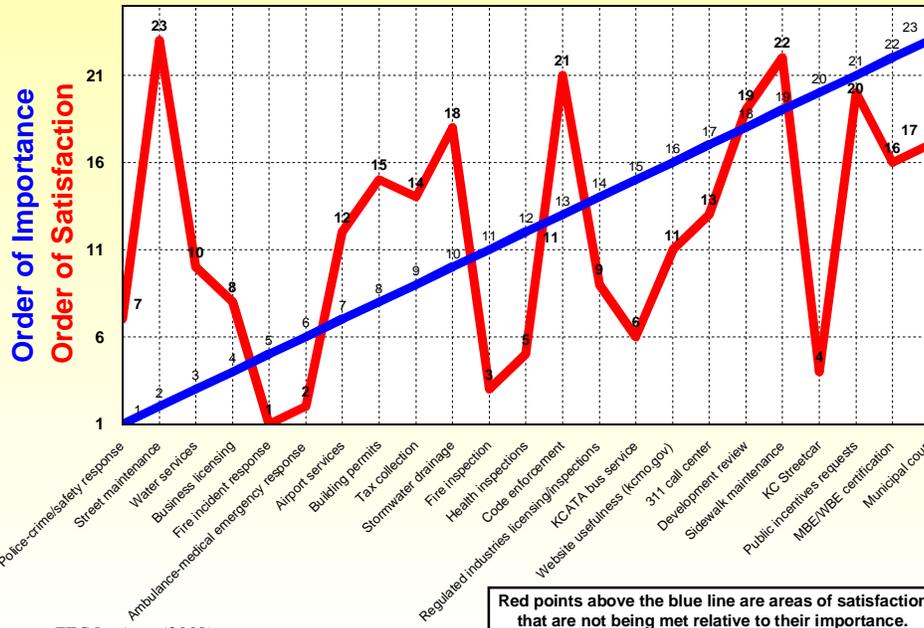
Q5. Which THREE of these services, City departments or programs are MOST IMPORTANT to your business?

by percentage of respondents who selected the item as one of their top three choices (excluding "none chosen")



Source: ETC Institute (2018)

Satisfaction with City Services, Departments and Programs vs. Level of Importance

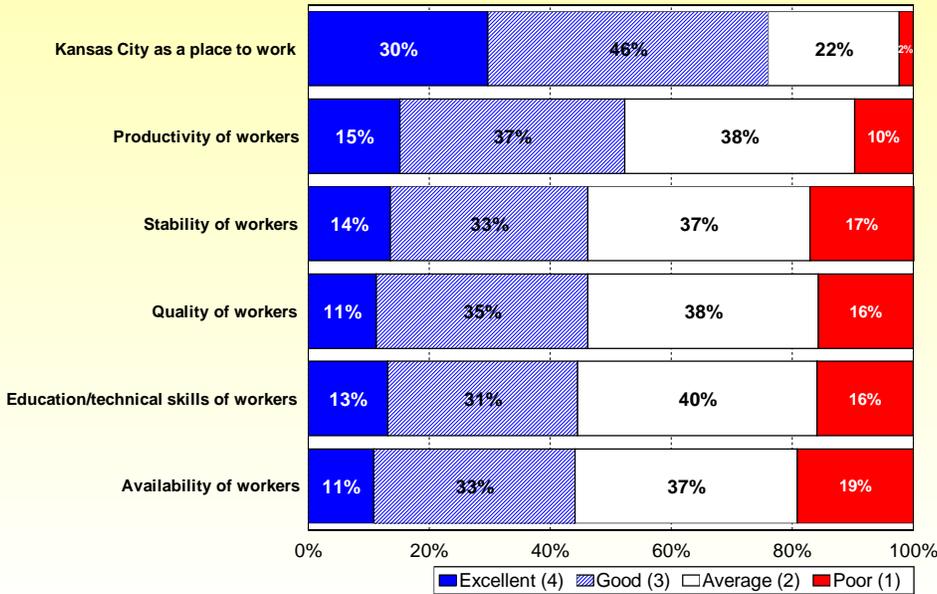


Source: ETC Institute (2018)

Red points above the blue line are areas of satisfaction that are not being met relative to their importance.

Q6. Please rate several issues about the workforce in Kansas City

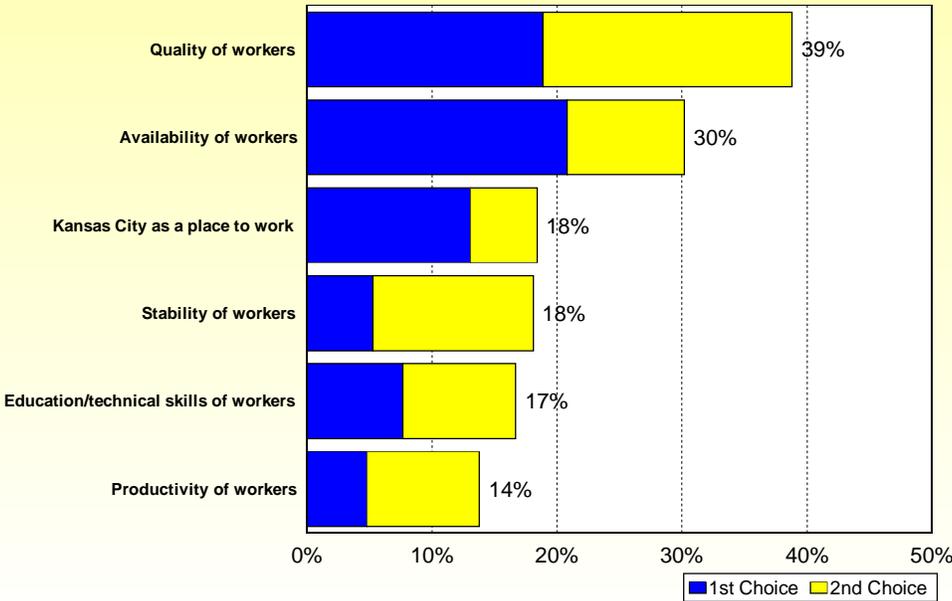
by percentage of respondents (excluding "don't know" responses)



Source: ETC Institute (2018)

Q7. Which TWO of these issues are most important in your decision to stay in Kansas City, Missouri?

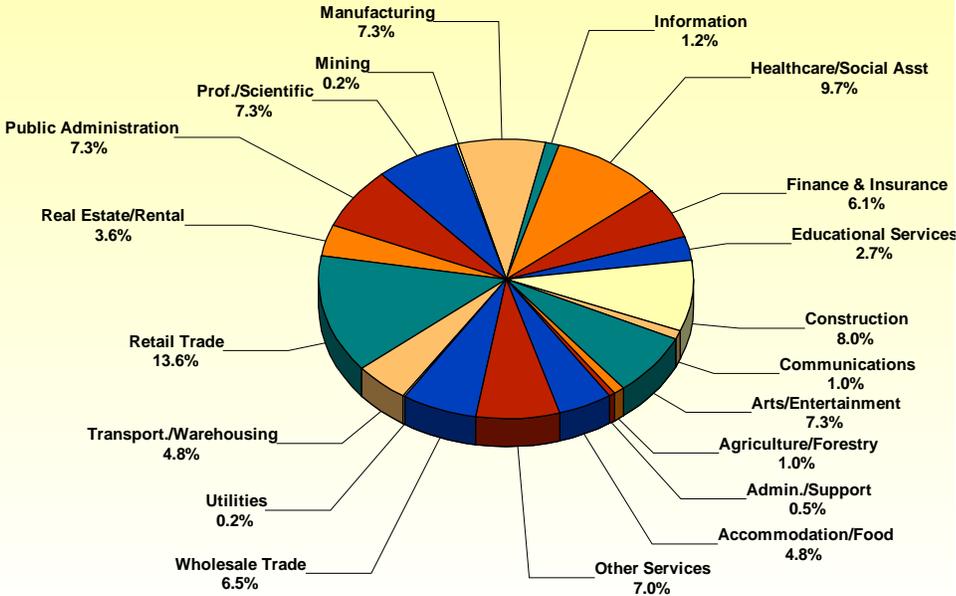
by percentage of respondents who selected the item as one of their top two choices



Source: ETC Institute (2018)

Q8. Which of the following best describes your business/organization's sector?

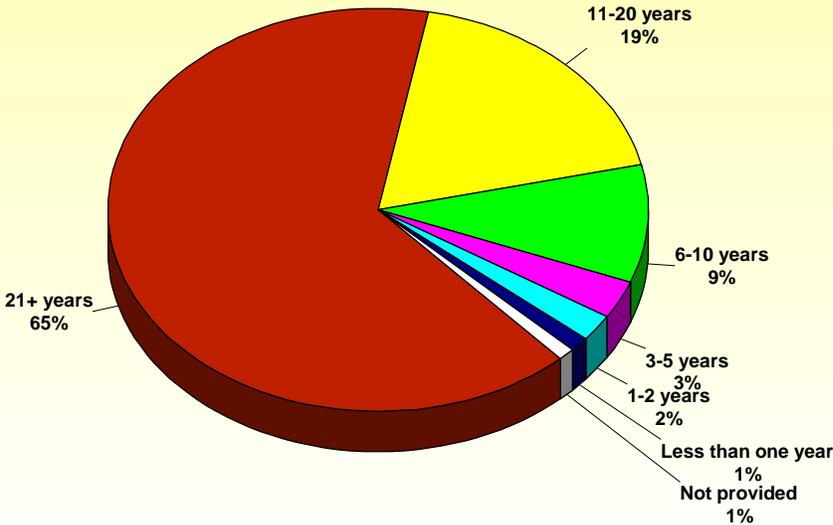
by percentage of respondents



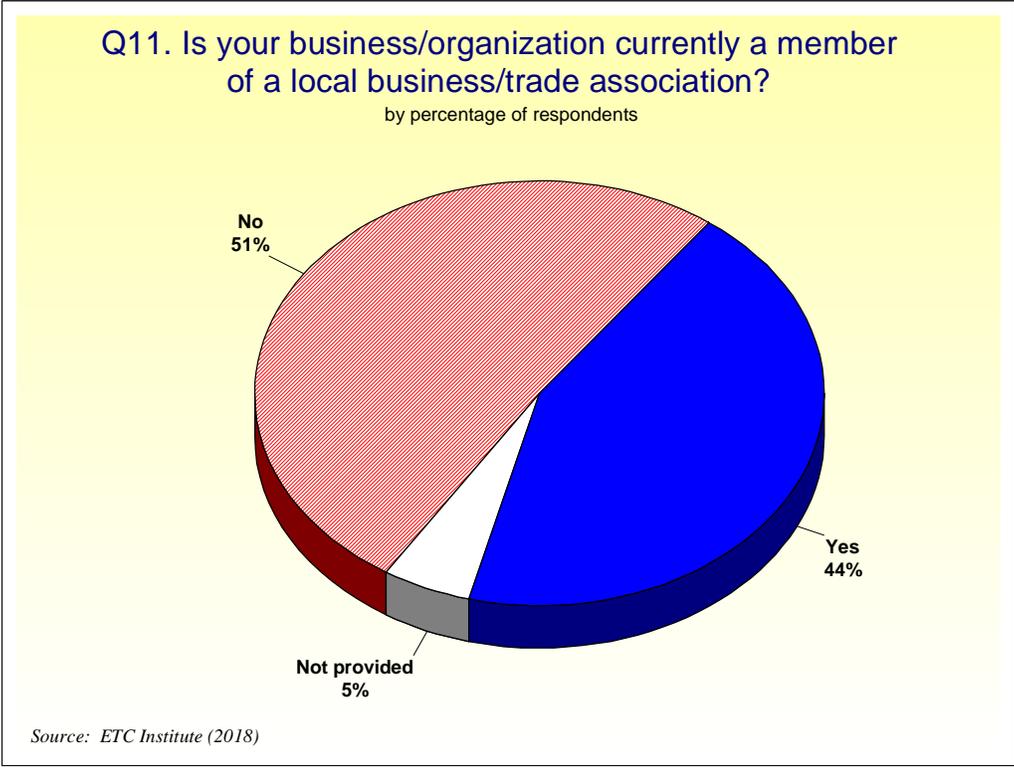
Source: ETC Institute (2018)

Q9. How long has your business/organization been located in Kansas City, Missouri?

by percentage of respondents

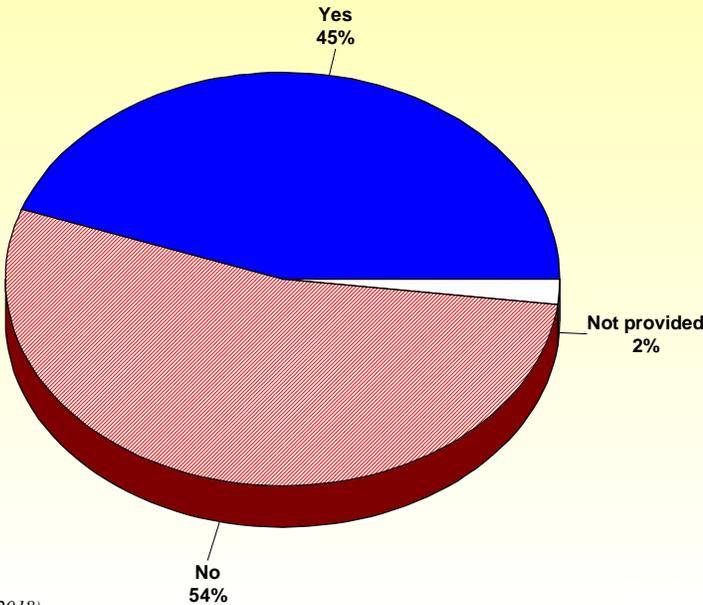


Source: ETC Institute (2018)



Q12. Is your personal residence located in Kansas City, Missouri?

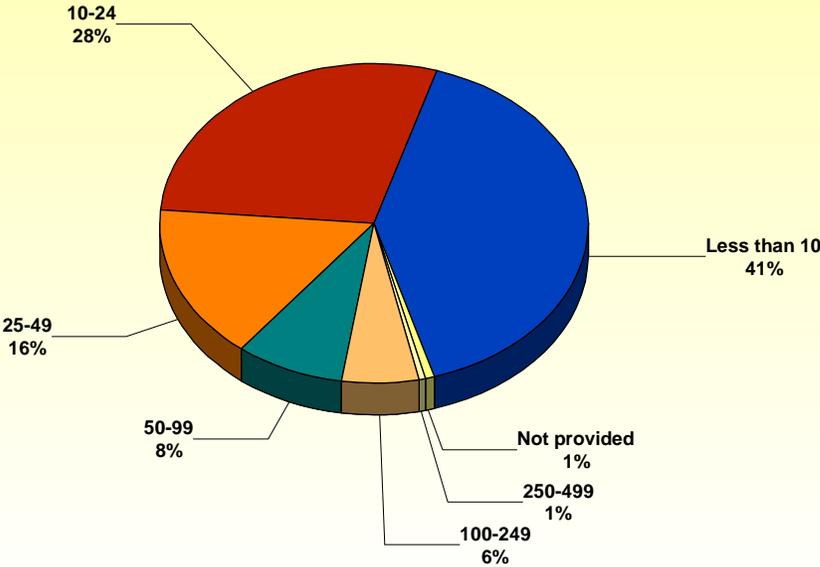
by percentage of respondents



Source: ETC Institute (2018)

Q13. Approximately how many employees does your organization employ at this location?

by percentage of respondents

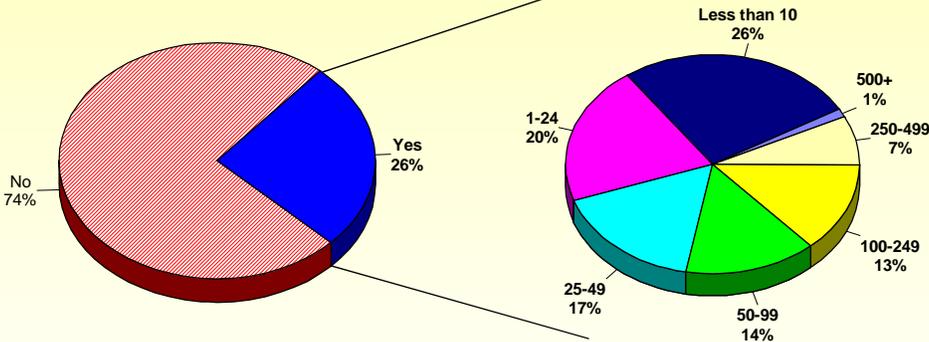


Source: ETC Institute (2018)

Q14. Does your company have employees at other locations in the metropolitan Kansas City area?

by percentage of respondents

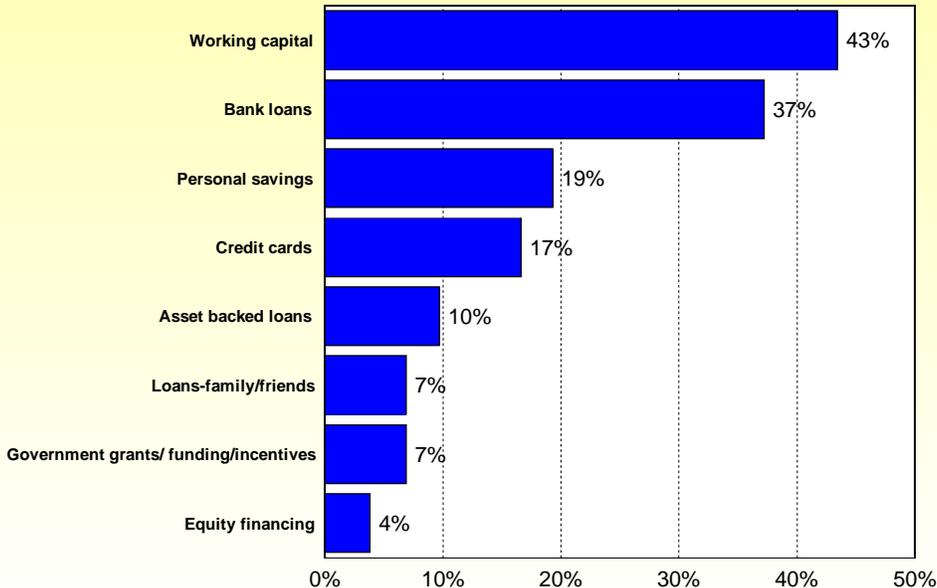
Q14-1. If YES, how many employees do you have at other locations in the Kansas City area?



Source: ETC Institute (2018)

Q15. Which of following has your organization used to fund your business needs during the past five years?

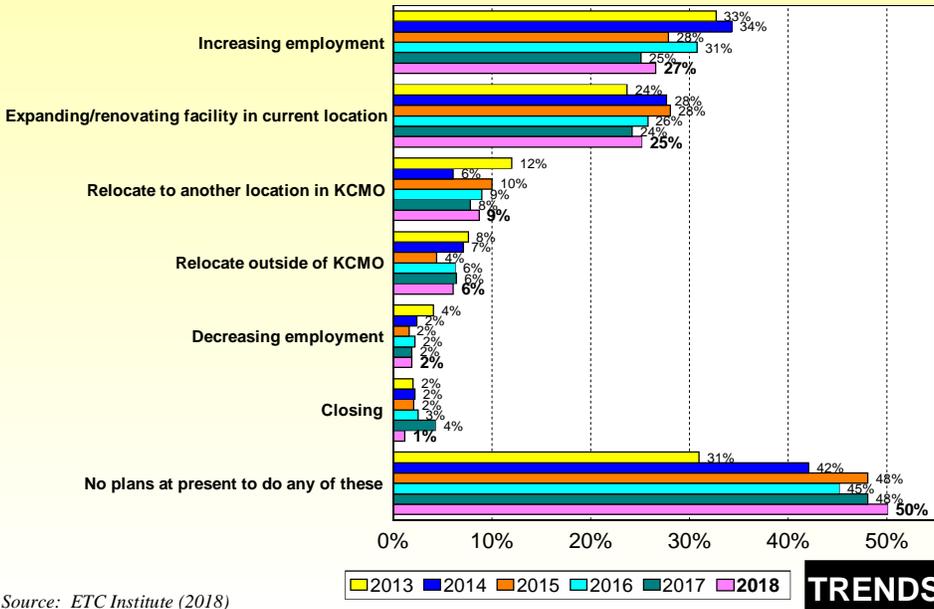
by percentage of respondents



Source: ETC Institute (2018)

Q16. In the next three years, is your organization planning to do any of the following? 2013 to 2018

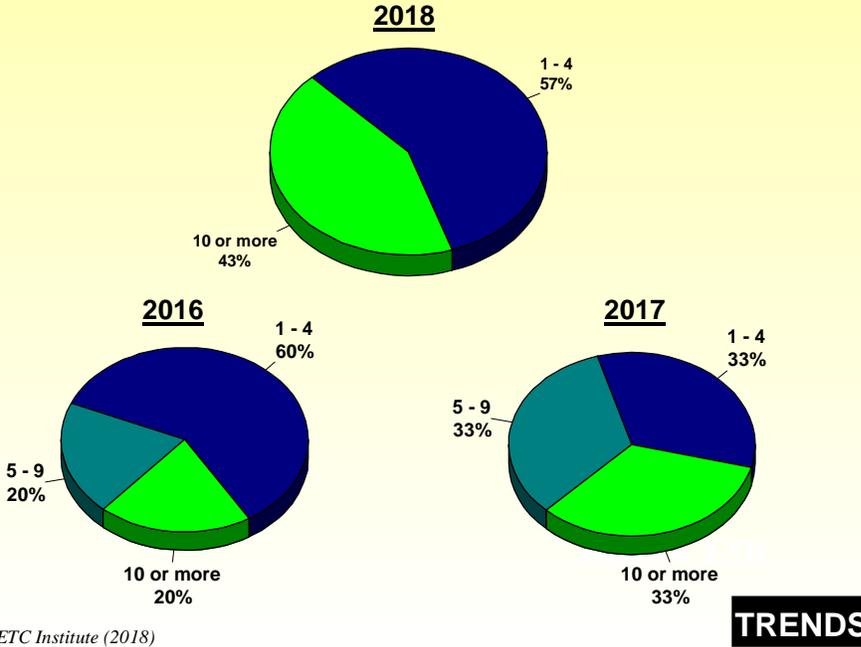
by percentage of respondents (multiple selections could be made)



Source: ETC Institute (2018)

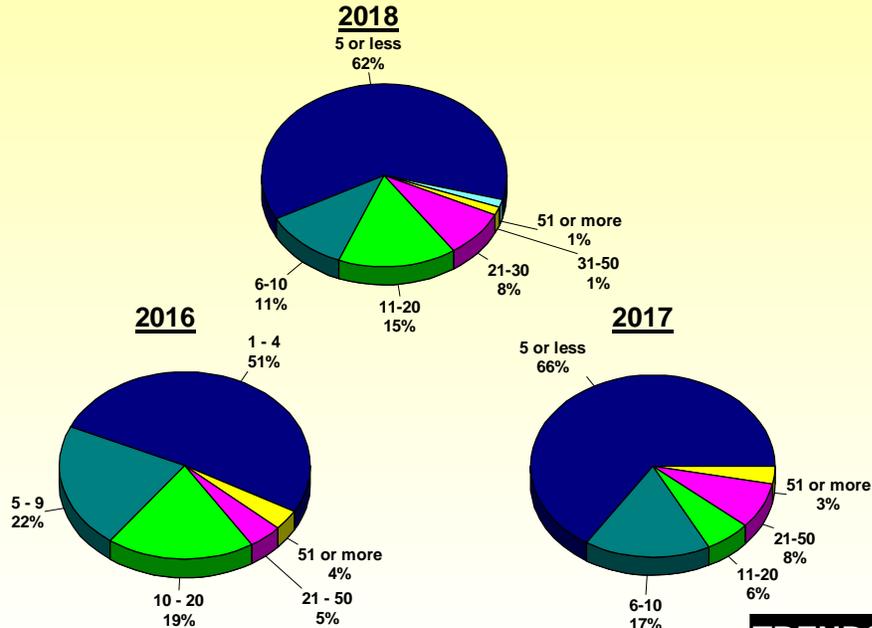
Q16(4). Please indicate the anticipated number of layoffs

by percentage of respondents who selected "decreasing employment" on Question 16



Source: ETC Institute (2018)

Q16(5). Please indicate the anticipated number of new hires
by percentage of respondents who selected "increasing employment" on Question 16

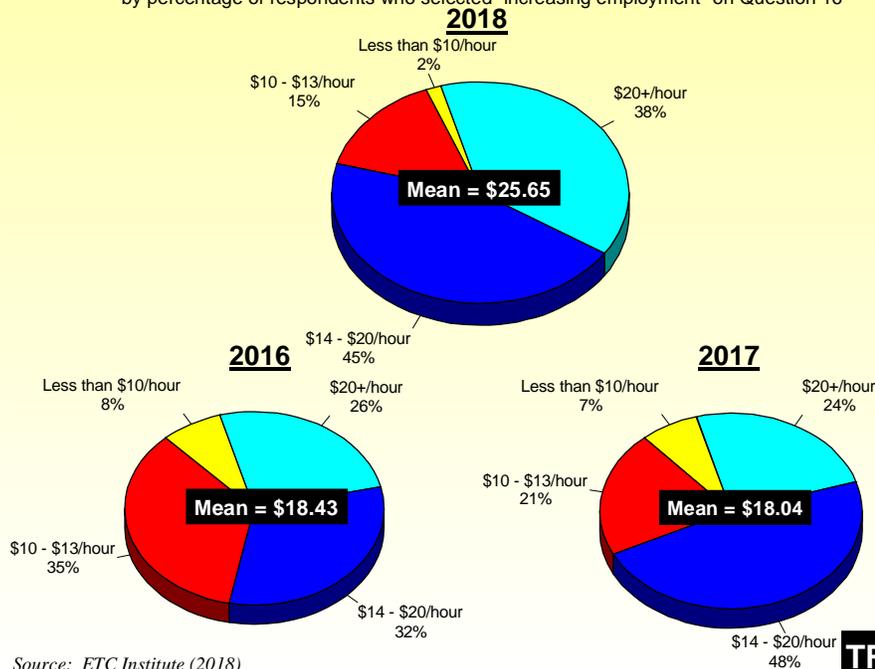


Source: ETC Institute (2018)

TRENDS

Q16(5). Wage level (hourly)

by percentage of respondents who selected "increasing employment" on Question 16

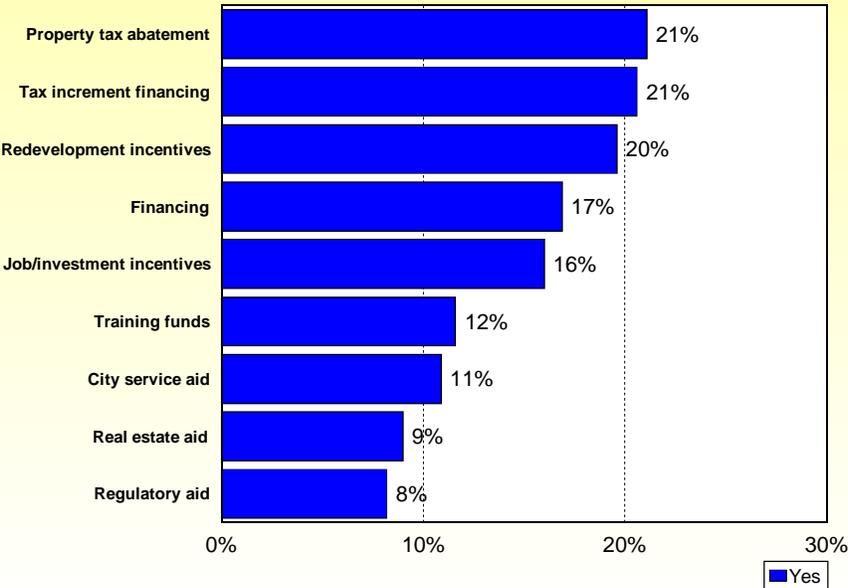


Source: ETC Institute (2018)

TRENDS

Q17. Are you aware of the services provided by the EDC of KCMO?

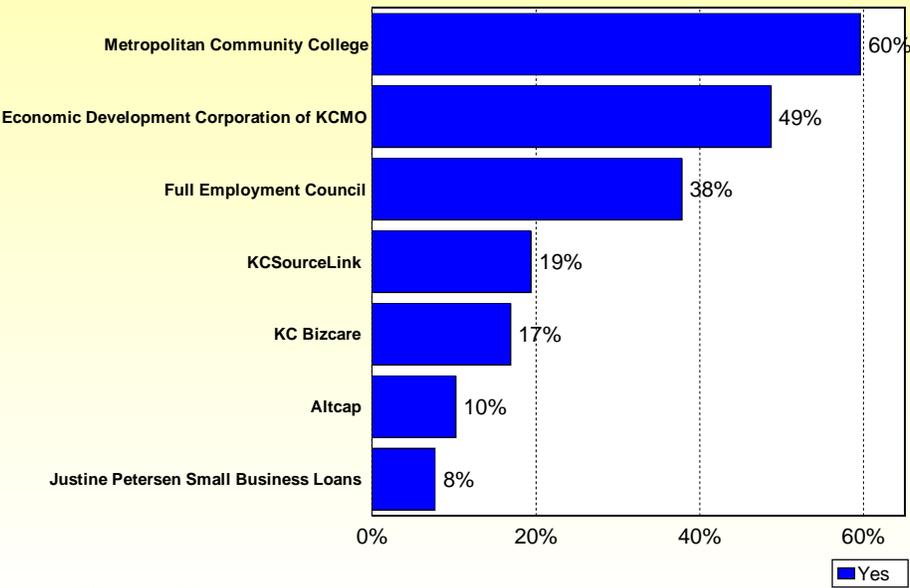
by percentage of respondents (multiple selections could be made)



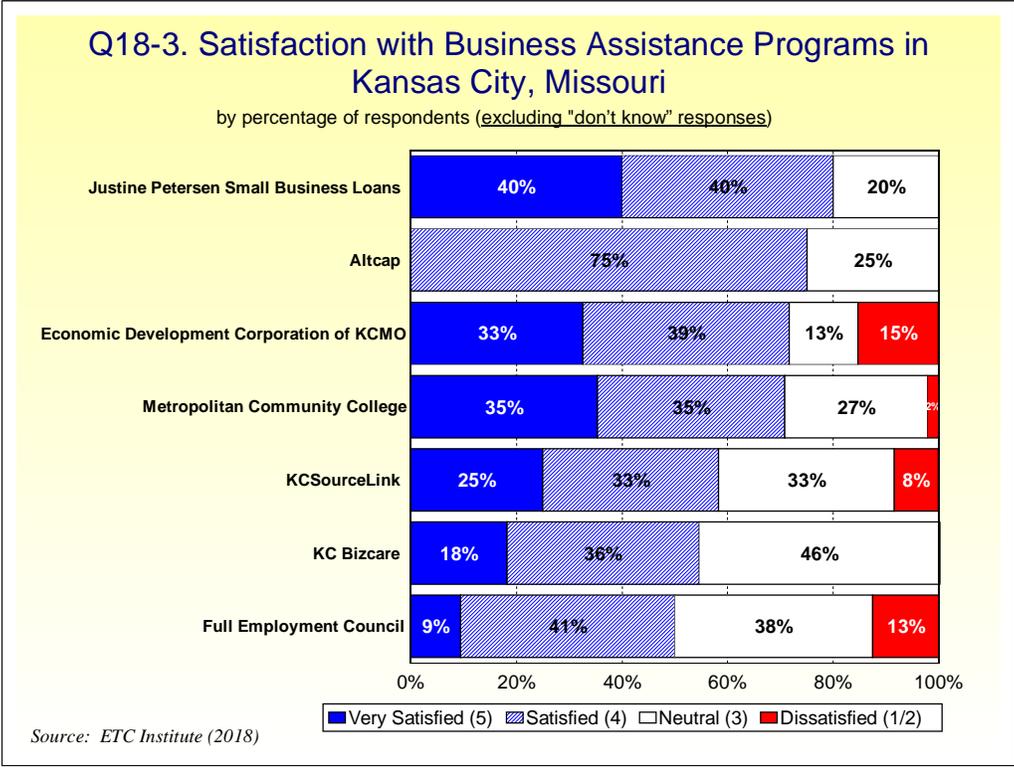
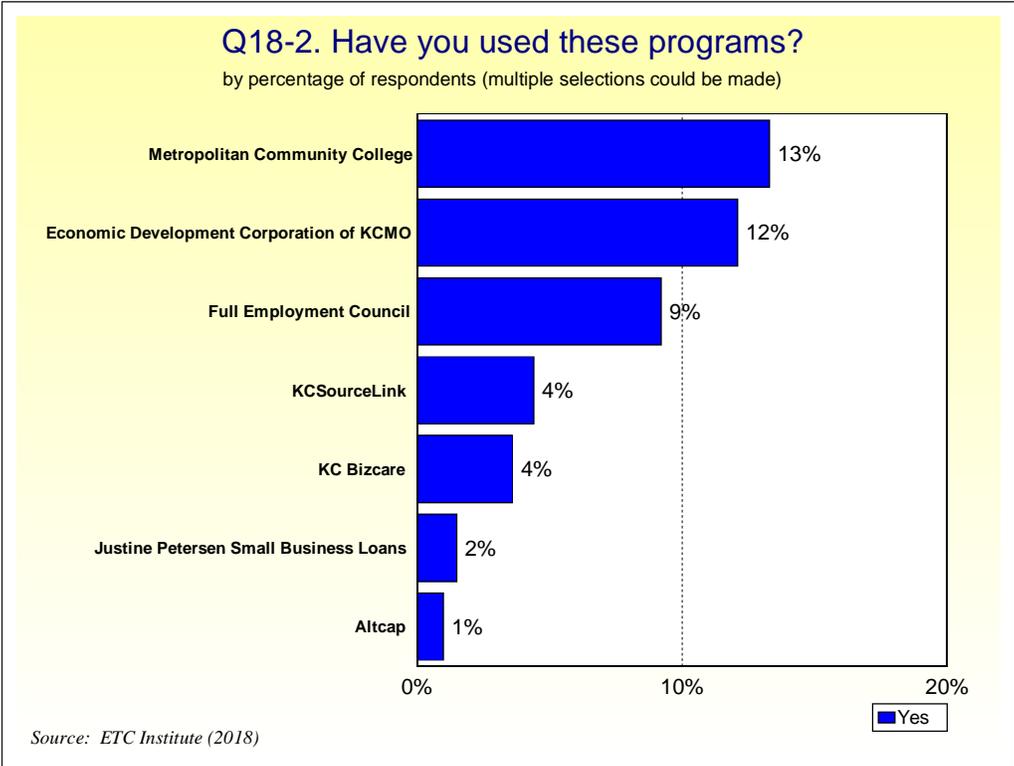
Source: ETC Institute (2018)

Q18-1. Are you aware of the following business assistance programs?

by percentage of respondents (multiple selections could be made)

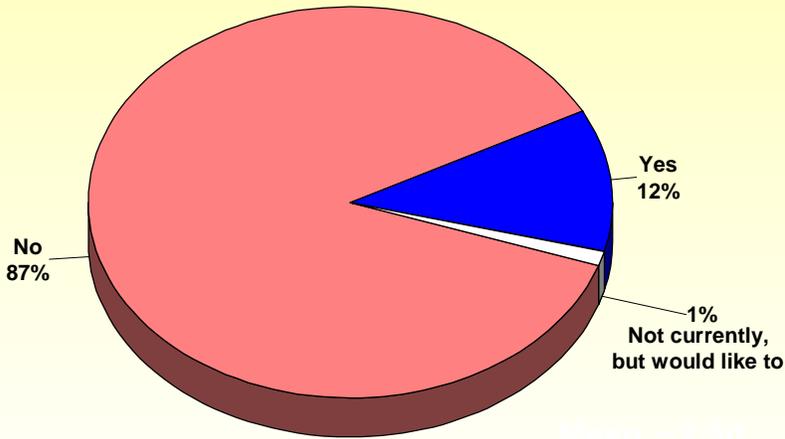


Source: ETC Institute (2018)



Q19. Does your company currently sell any products/services outside of the United States?

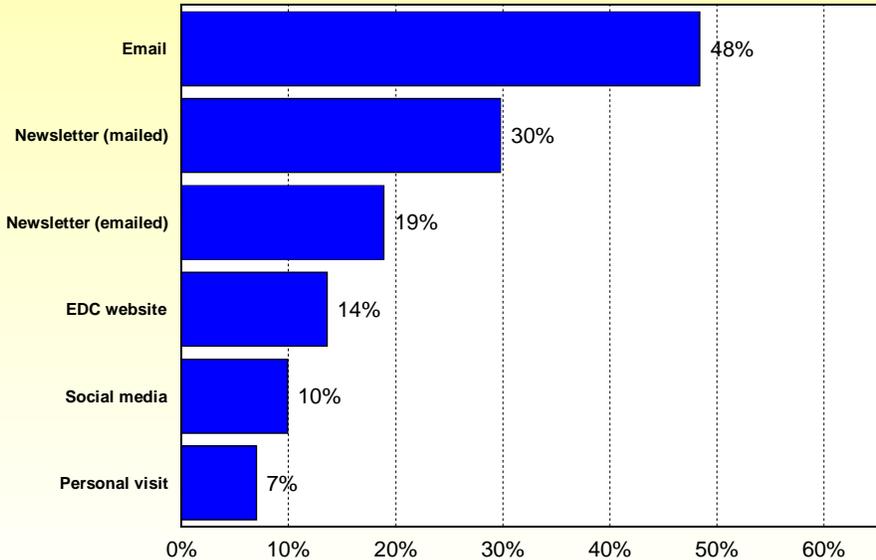
by percentage of respondents



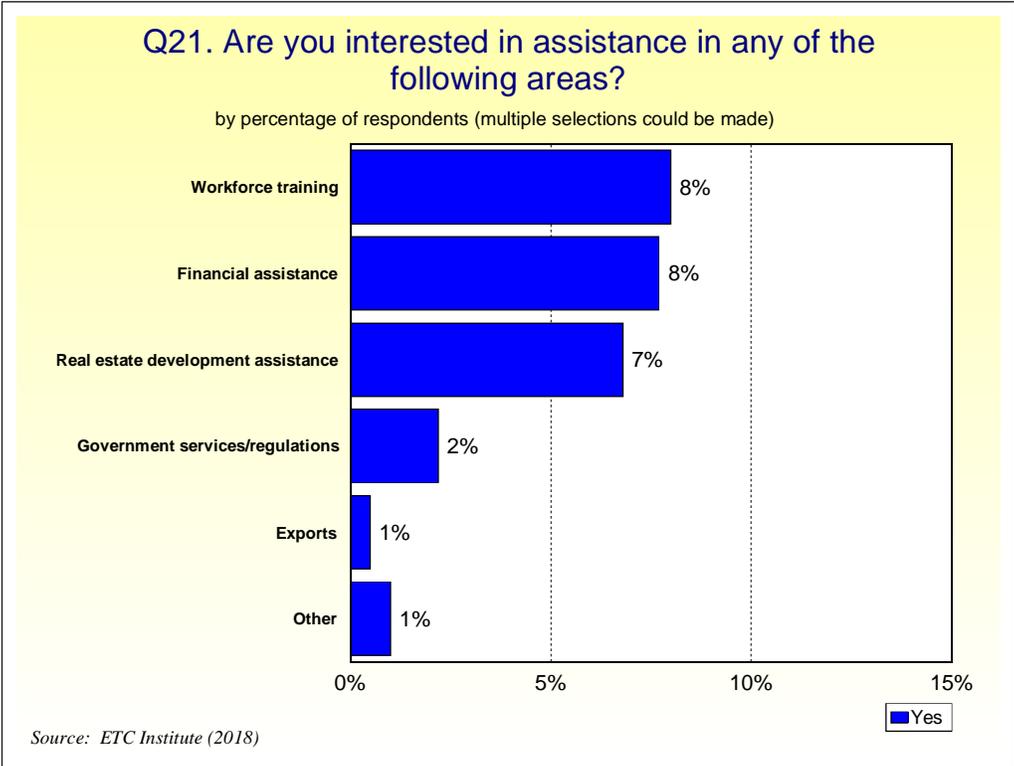
Source: ETC Institute (2018)

Q20. Which are your TWO preferred methods of getting information about business assistance programs?

by percentage of respondents (two selections could be made)



Source: ETC Institute (2018)



Section 2

Importance-Satisfaction Analysis



Importance-Satisfaction Analysis

Kansas City, Missouri Employer Survey

Overview

Today, City officials have limited resources which need to be targeted to activities that are of the most benefit to their businesses. Two of the most important criteria for decision making are (1) to target resources toward services of the highest importance; and (2) to target resources toward those services where businesses are the least satisfied.

The Importance-Satisfaction (IS) rating is a unique tool that allows public officials to better understand both of these highly important decision-making criteria for each of the services they are providing. The Importance-Satisfaction rating is based on the concept that public agencies will maximize overall customer satisfaction by emphasizing improvements in those areas where the level of satisfaction is relatively low and the perceived importance of the service is relatively high.

Methodology

The rating is calculated by summing the percentage of responses for items selected as the first, second, and third most important services. The sum is then multiplied by 1 minus the percentage of respondents who indicated they were positively satisfied with the City's performance in the related area (the sum of the ratings of 4 and 5 on a 5-point scale excluding "Don't Know" responses). "Don't Know" responses are excluded from the calculation to ensure the satisfaction ratings among service categories are comparable. $[IS = \text{Importance} \times (1 - \text{Satisfaction})]$.

Example of the Calculation: Respondents were asked to identify the major categories of City services that are most important to their business. Twenty percent (20%) of respondents selected *the street maintenance* as one of the most important services.

With regard to satisfaction, 36% of respondents surveyed rated the City's overall *street maintenance* as a "4" or "5" on a 5-point scale (where "5" means "Very Satisfied") excluding "Don't Know" responses. The I-S rating for *street maintenance* was calculated by multiplying the sum of the most important percentages by 1 minus the sum of the satisfaction percentages. In this example 20% was multiplied by 64% (1-0.36). This calculation yielded an I-S rating of 0.1270 which ranked first out of 23 major service categories.

The maximum rating is 1.00 and would be achieved when 100% of the respondents select an item as one of their top three choices to emphasize over the next two years and 0% indicate they are positively satisfied with the delivery of the service.



The lowest rating is 0.00 and could be achieved under either of the following two situations:

- If 100% of the respondents were positively satisfied with the delivery of the service
- If none (0%) of the respondents selected the service as one for the three most important areas for the City to emphasize over the next two years.

Interpreting the Ratings

Ratings that are greater than or equal to 0.20 identify areas that should receive significantly more emphasis over the next two years. Ratings from 0.10 to 0.20 identify service areas that should receive increased emphasis. Ratings less than 0.10 should continue to receive the current level of emphasis.

- *Definitely Increase Emphasis* ($IS \geq 0.20$)
- *Increase Current Emphasis* ($0.10 \leq IS < 0.20$)
- *Maintain Current Emphasis* ($IS < 0.10$)

The results for the City of Kansas City, Missouri Employer Survey are provided on the following pages.

2018 Importance-Satisfaction Rating

Kansas City, Missouri Employer Survey

Major Categories of City Services

Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
High Priority (IS .10-.20)						
Street maintenance	20%	2	36%	23	0.1270	1
Police-crime/safety response	40%	1	72%	7	0.1126	2
Medium Priority (IS <.10)						
Water services	18%	3	62%	AB	0.0687	3
Business licensing	16%	4	65%	8	0.0570	4
Building permits	9%	8	52%	15	0.0416	5
Code enforcement	7%	13	39%	21	0.0411	6
Airport services	10%	7	60%	12	0.0395	7
Stormwater drainage	8%	10	50%	18	0.0389	8
Tax collection	8%	9	53%	14	0.0364	9
Website usefulness (kcmo.gov)	6%	16	60%	11	0.0219	10
Regulated industries licensing/inspections	6%	14	63%	9	0.0215	11
Sidewalk maintenance	3%	19	37%	22	0.0202	12
Development review	4%	18	49%	19	0.0199	13
311 call center	4%	17	57%	13	0.0177	14
Health inspections	7%	12	76%	5	0.0176	15
KCATA bus service	6%	15	73%	6	0.0149	16
Public incentives requests	2%	21	44%	20	0.0123	17
Fire inspection	8%	11	86%	3	0.0109	18
Ambulance-medical emergency response	11%	6	90%	2	0.0106	19
MBE/WBE certification	2%	22	52%	16	0.0091	20
Municipal court	2%	23	51%	17	0.0083	21
Fire incident response	12%	5	96%	1	0.0049	22
KC Streetcar	3%	20	84%	4	0.0047	23

Note: The I-S Rating is calculated by multiplying the "Most Important" % by (1-'Satisfaction' %)

Most Important %:

The "Most Important" percentage represents the sum of the first, second, and third most important responses for each item. Respondents were asked to identify the items they thought should be the City's top priorities.

Satisfaction %:

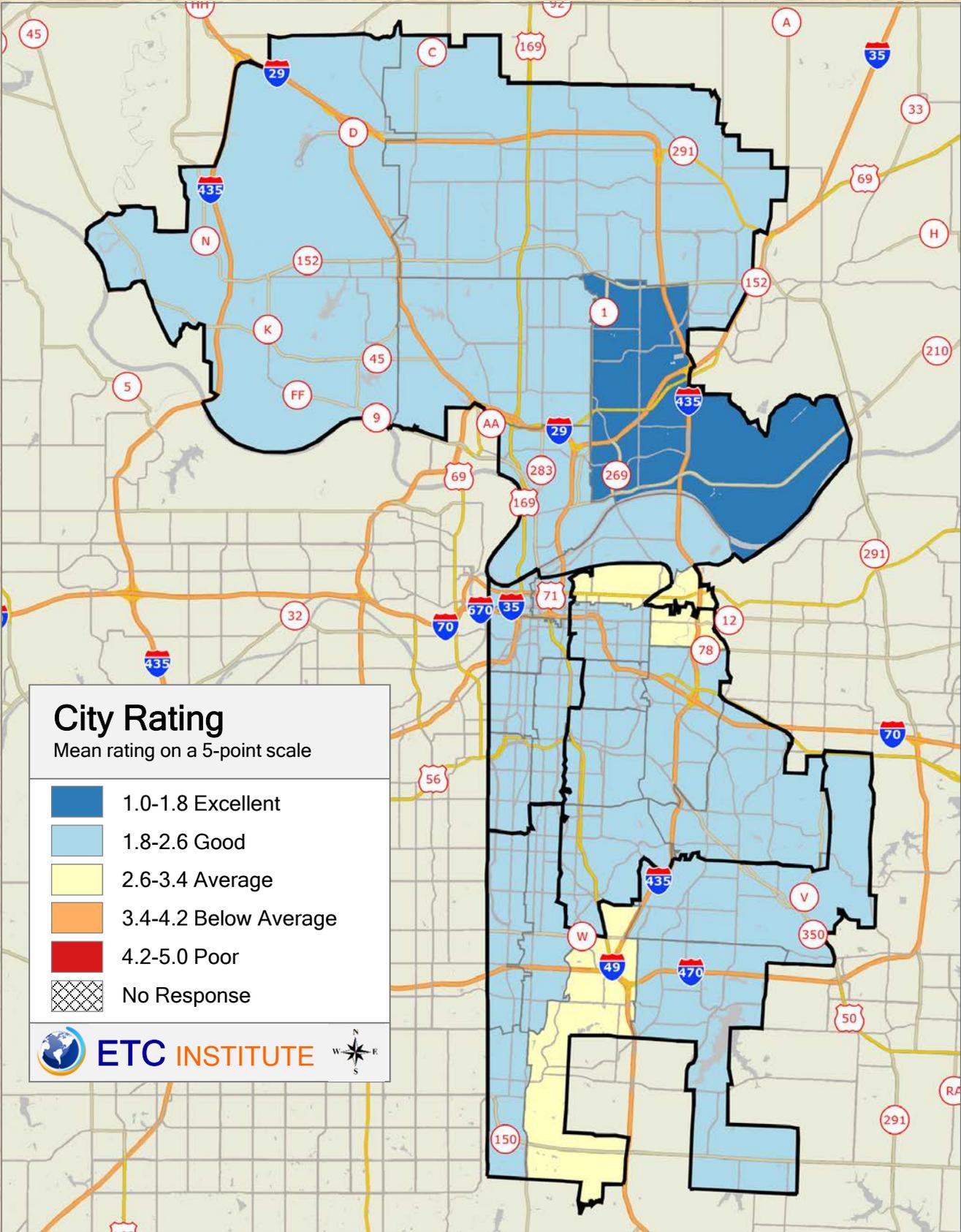
The "Satisfaction" percentage represents the sum of the ratings "5" and "4" excluding 'don't knows.' Respondents ranked their level of satisfaction with each of the items on a scale of 5 to 1 with "5" being Very Satisfied and "1" being Very Dissatisfied.

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Section 3

GIS Maps

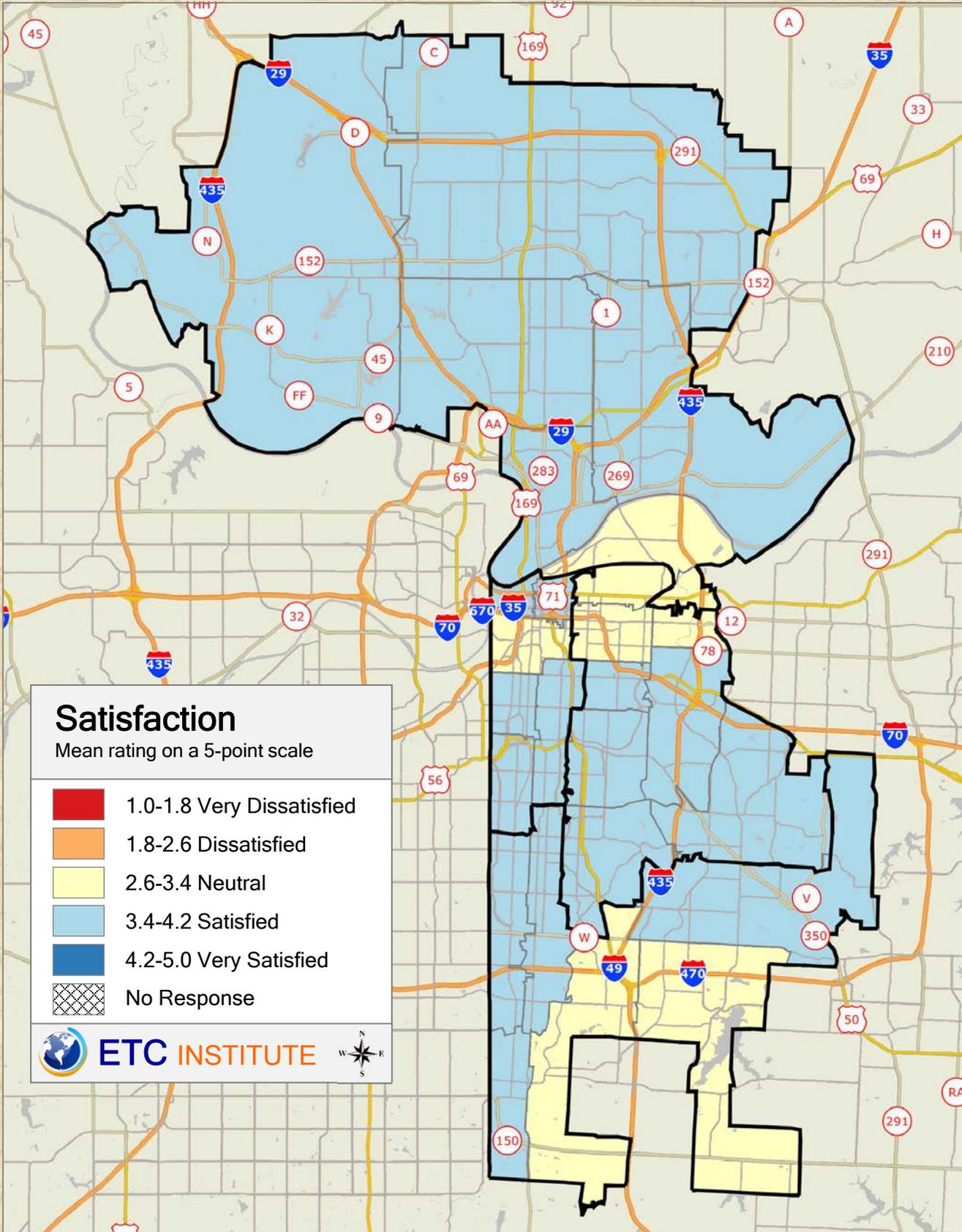
Q1. How would you rate Kansas City, Missouri overall as a place to do business?



2018 Kansas City, Missouri Employer Survey

Shading reflects the mean rating for all respondents by ZIP Code (merged as needed)

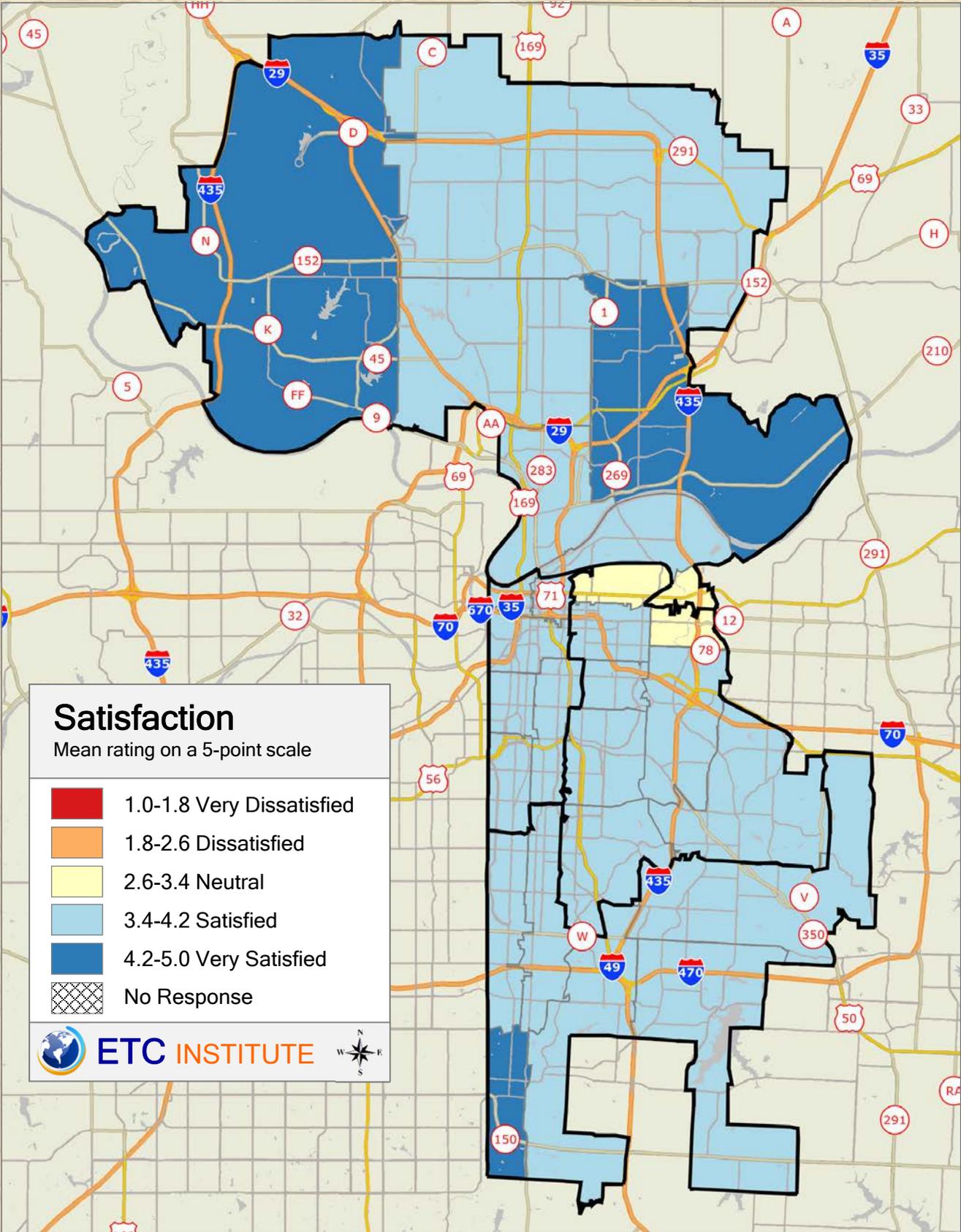
Q2.1 Satisfaction with: Overall quality of services provided by the City



2018 Kansas City, Missouri Employer Survey

Shading reflects the mean rating for all respondents by ZIP Code (merged as needed)

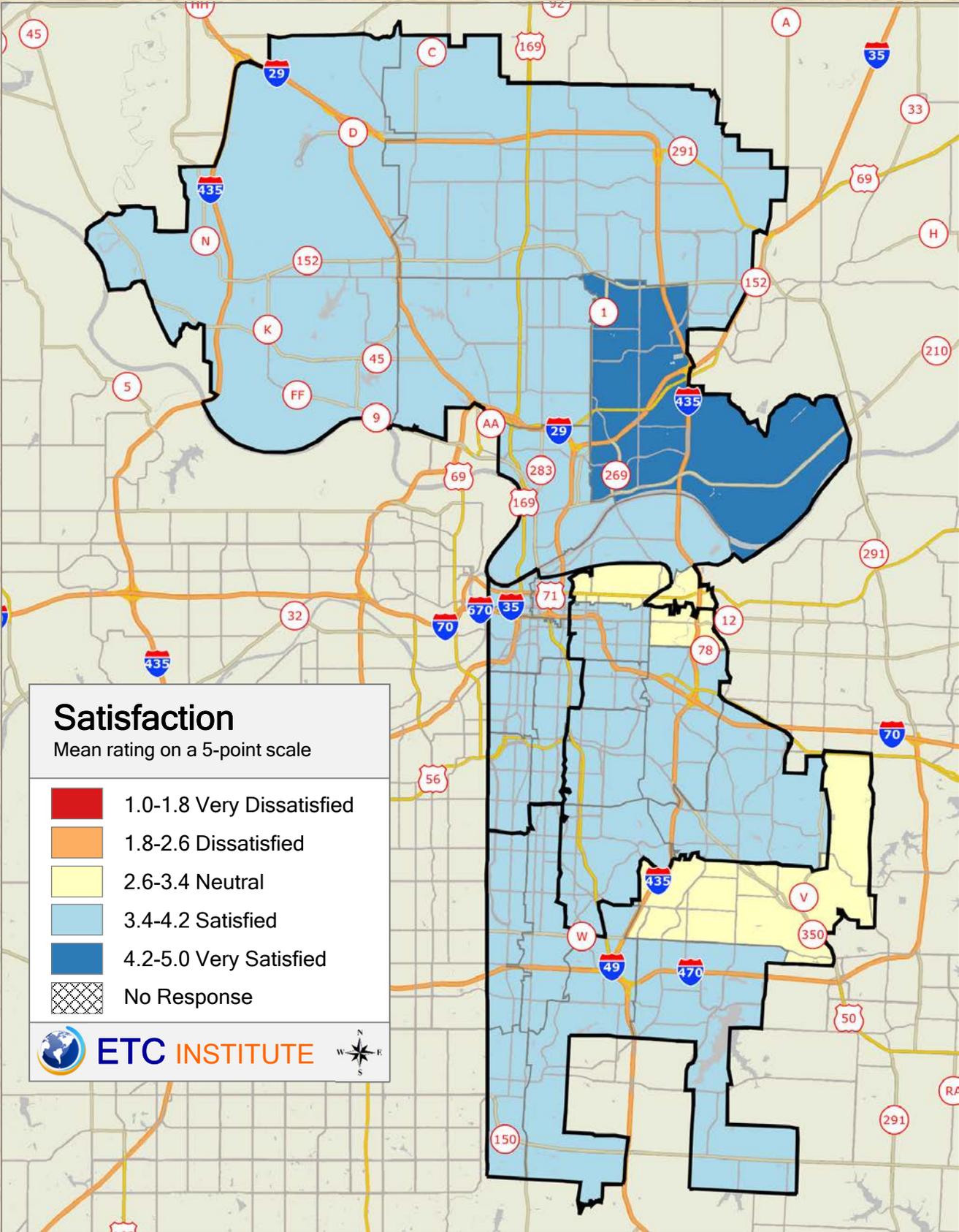
Q2.2 Satisfaction with: Overall image of the City



2018 Kansas City, Missouri Employer Survey

Shading reflects the mean rating for all respondents by ZIP Code (merged as needed)

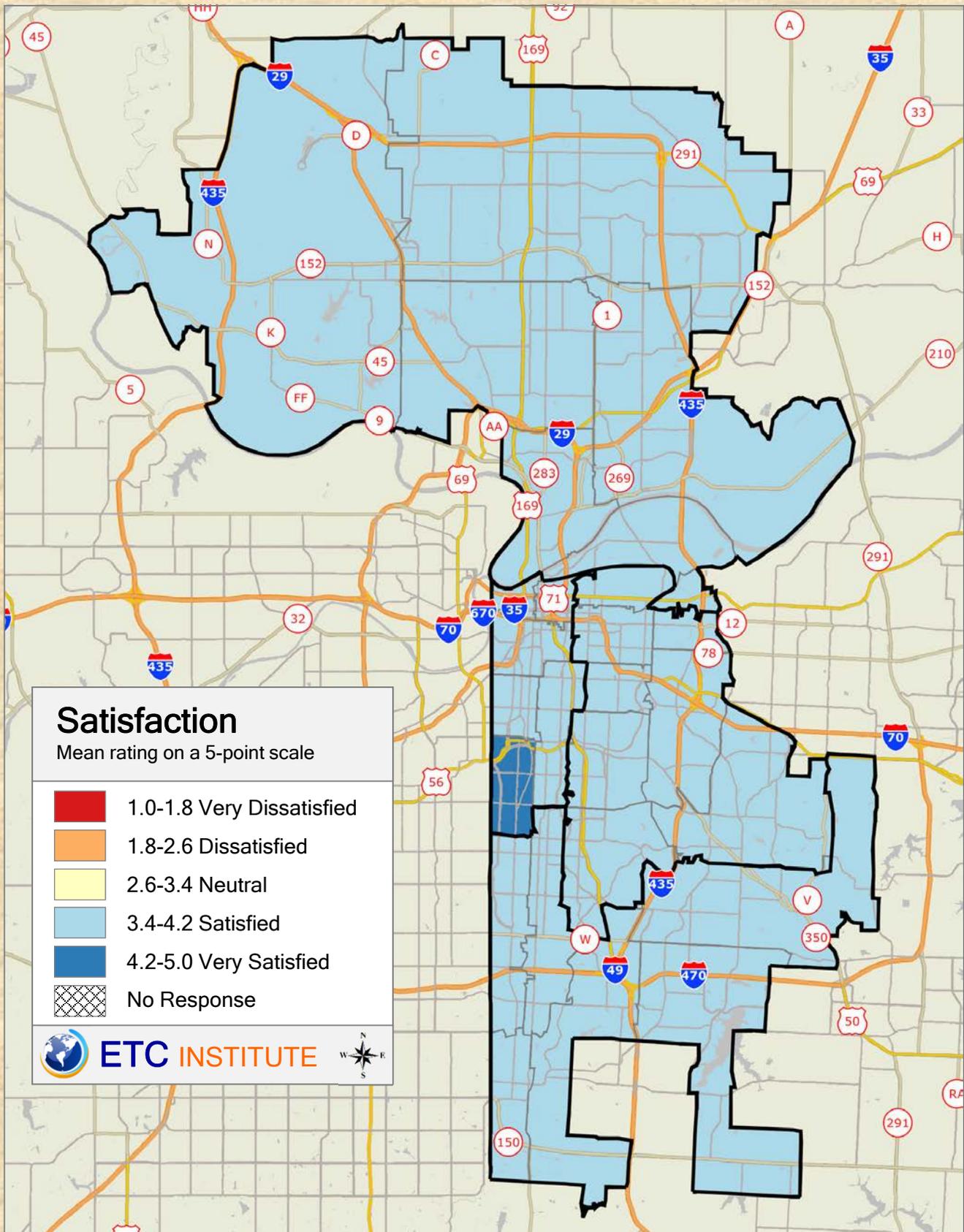
Q2.3 Satisfaction with: Overall quality of life in the City



2018 Kansas City, Missouri Employer Survey

Shading reflects the mean rating for all respondents by ZIP Code (merged as needed)

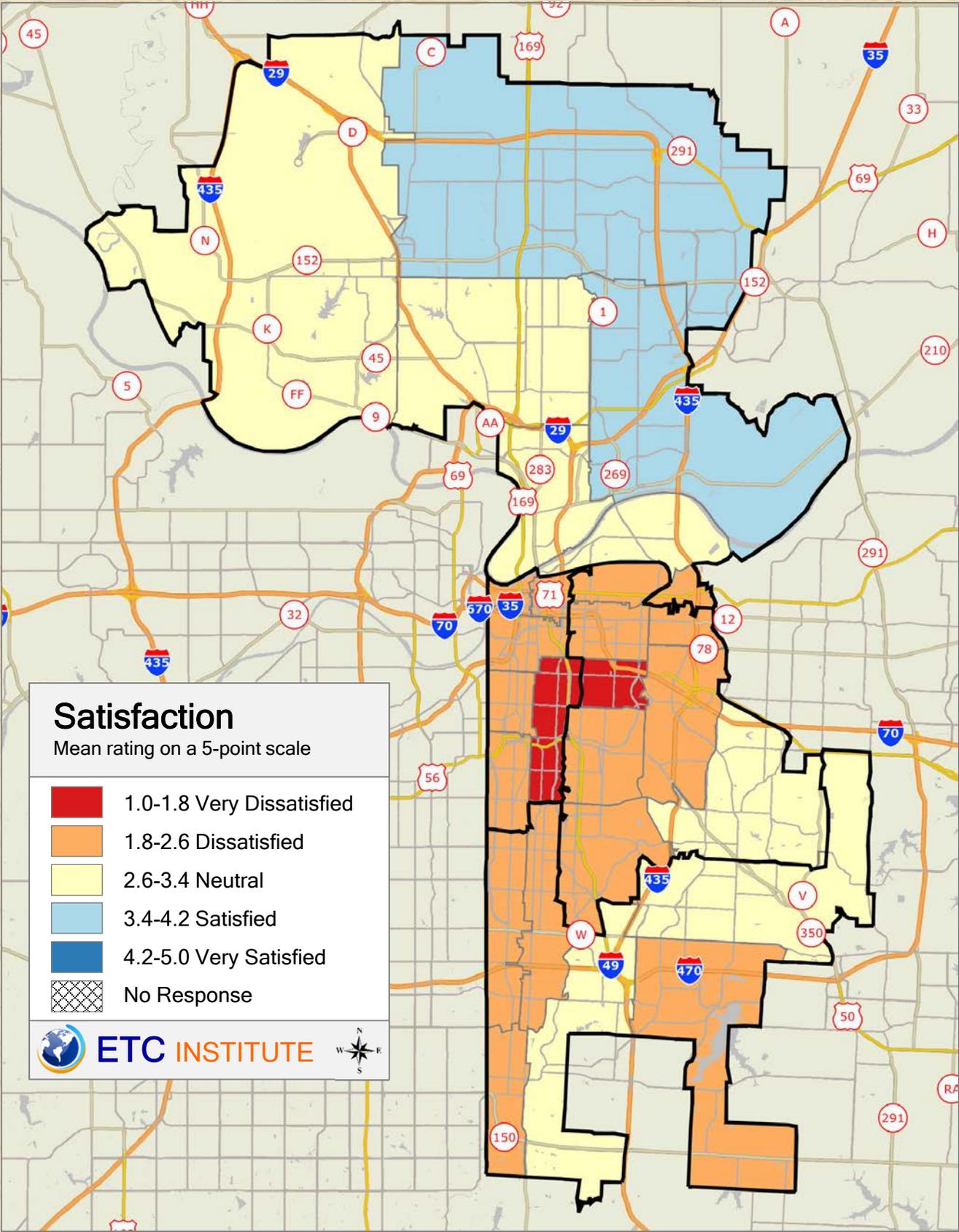
Q2.4 Satisfaction with: Quality of new development in the City



2018 Kansas City, Missouri Employer Survey

Shading reflects the mean rating for all respondents by ZIP Code (merged as needed)

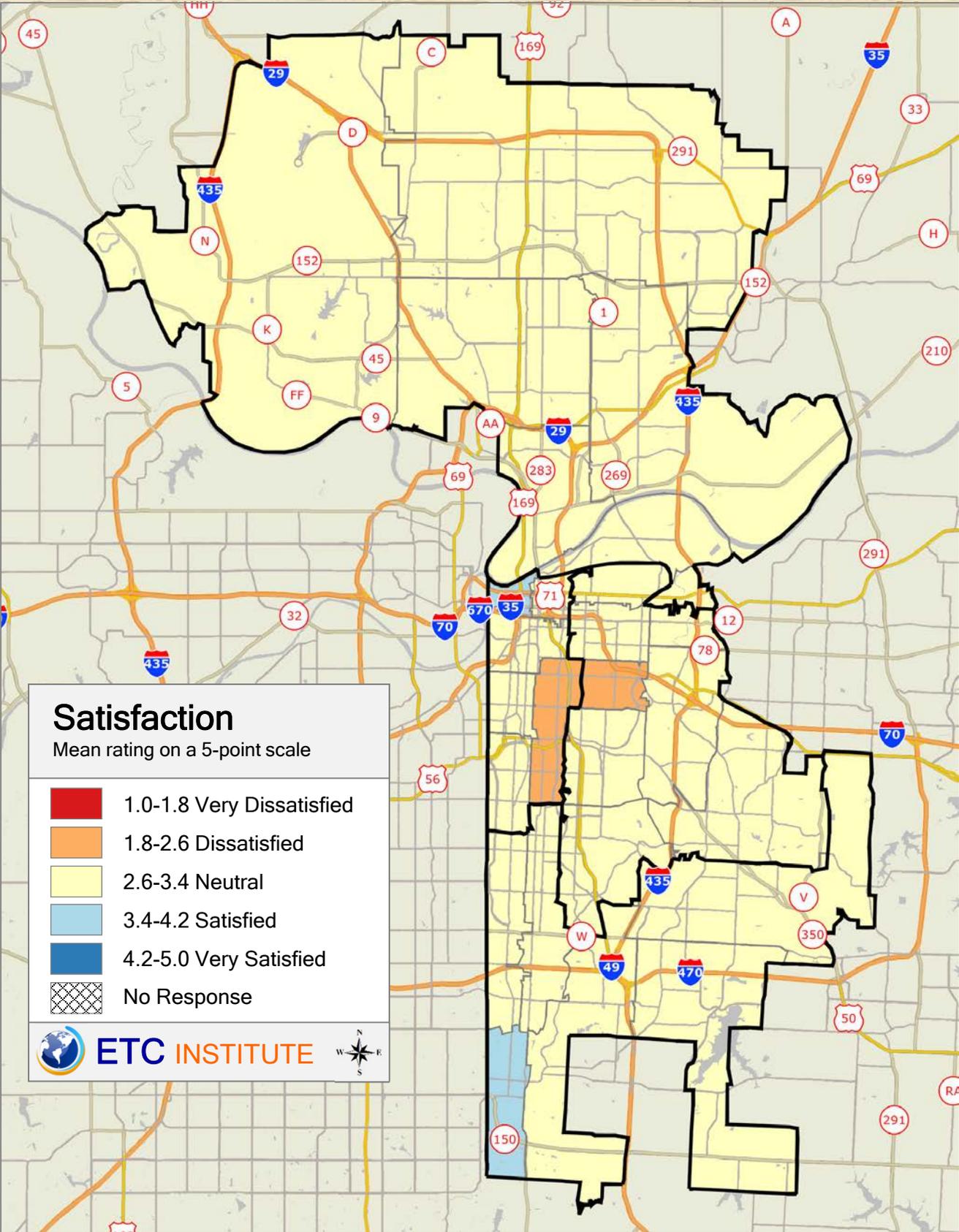
Q2.5 Satisfaction with: Overall quality of the education system within the City



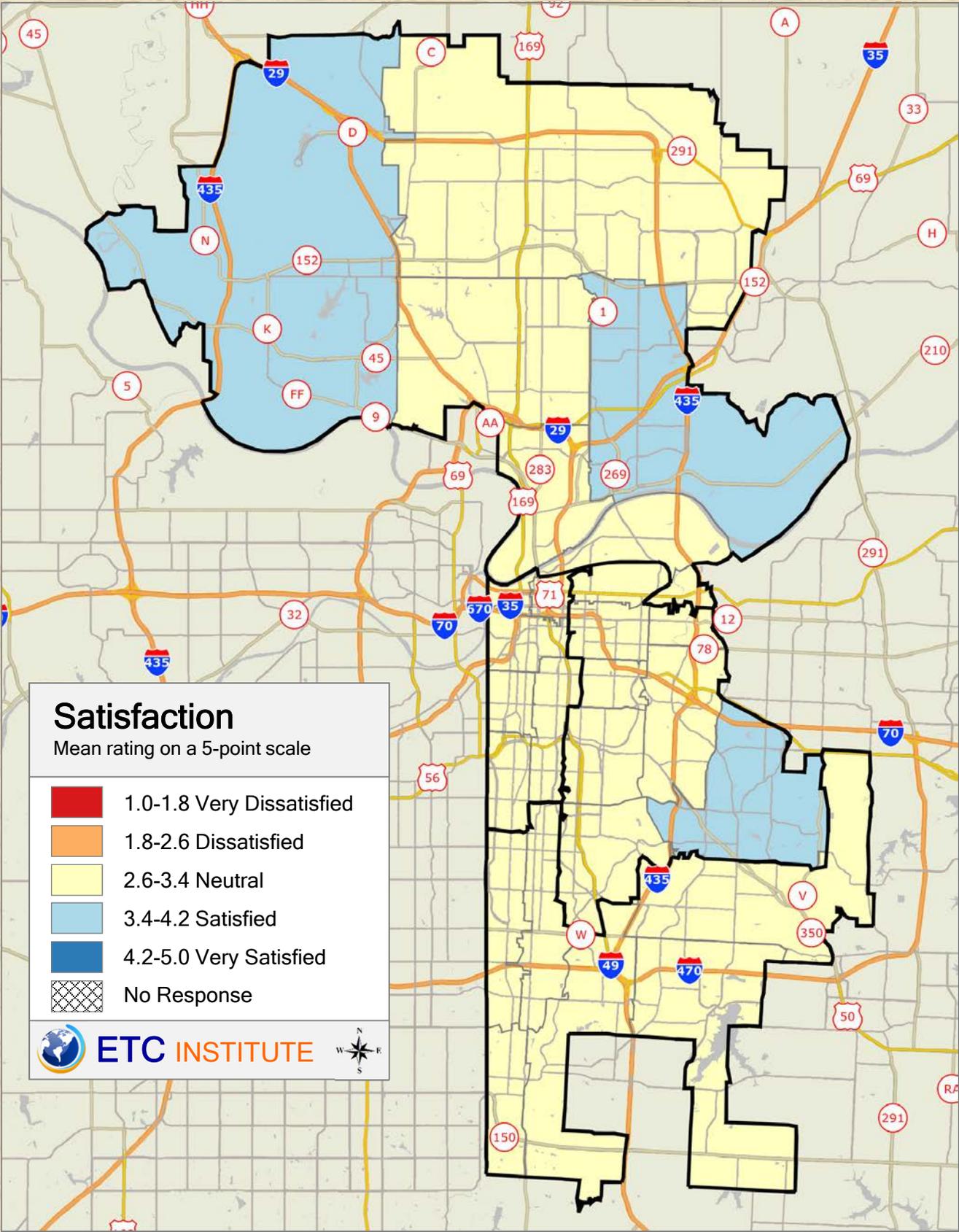
2018 Kansas City, Missouri Employer Survey

Shading reflects the mean rating for all respondents by ZIP Code (merged as needed)

Q2.6 Satisfaction with: Overall feeling of safety in the City



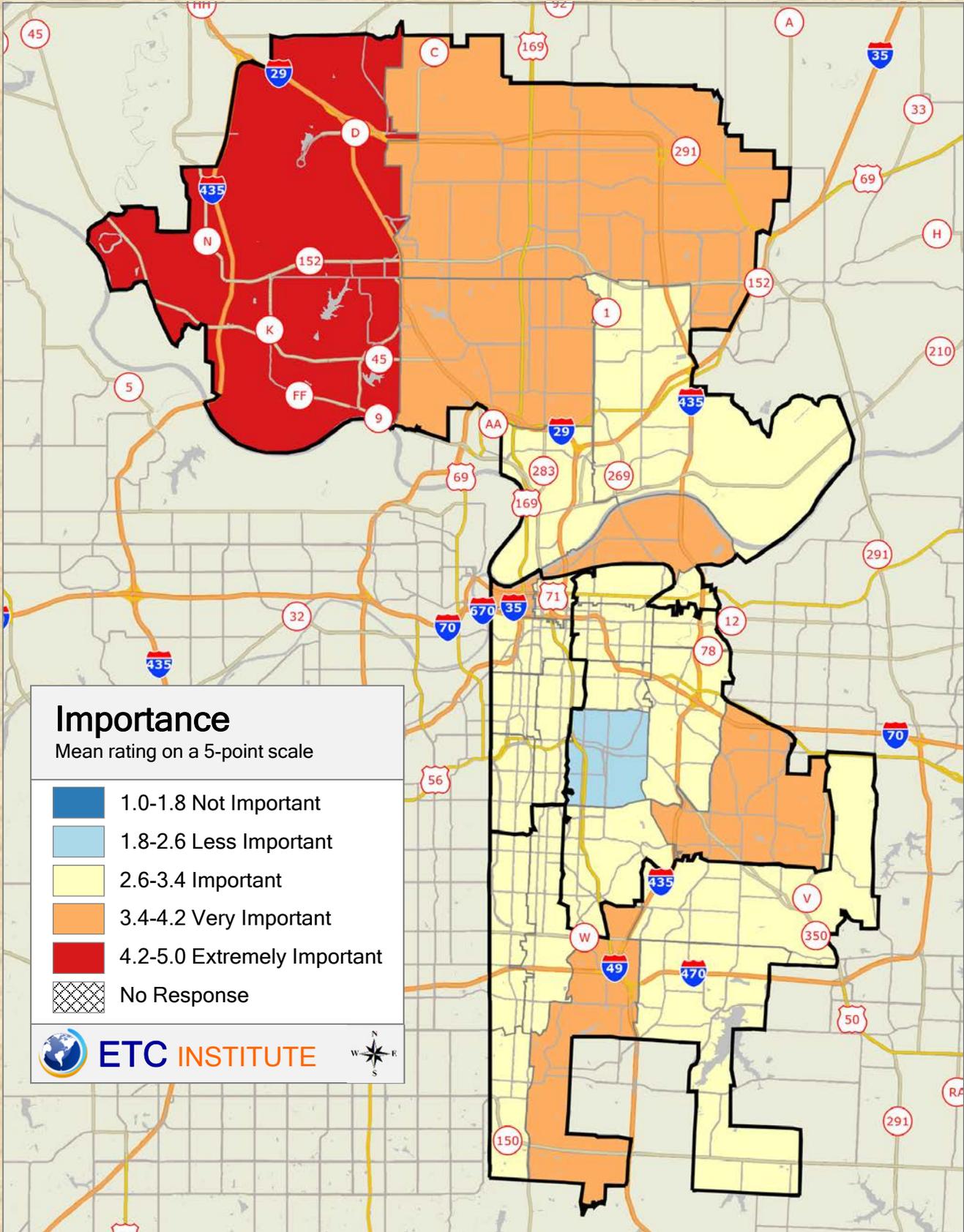
Q2.7 Satisfaction with: Overall value that you receive for your City tax dollars and fees



2018 Kansas City, Missouri Employer Survey

Shading reflects the mean rating for all respondents by ZIP Code (merged as needed)

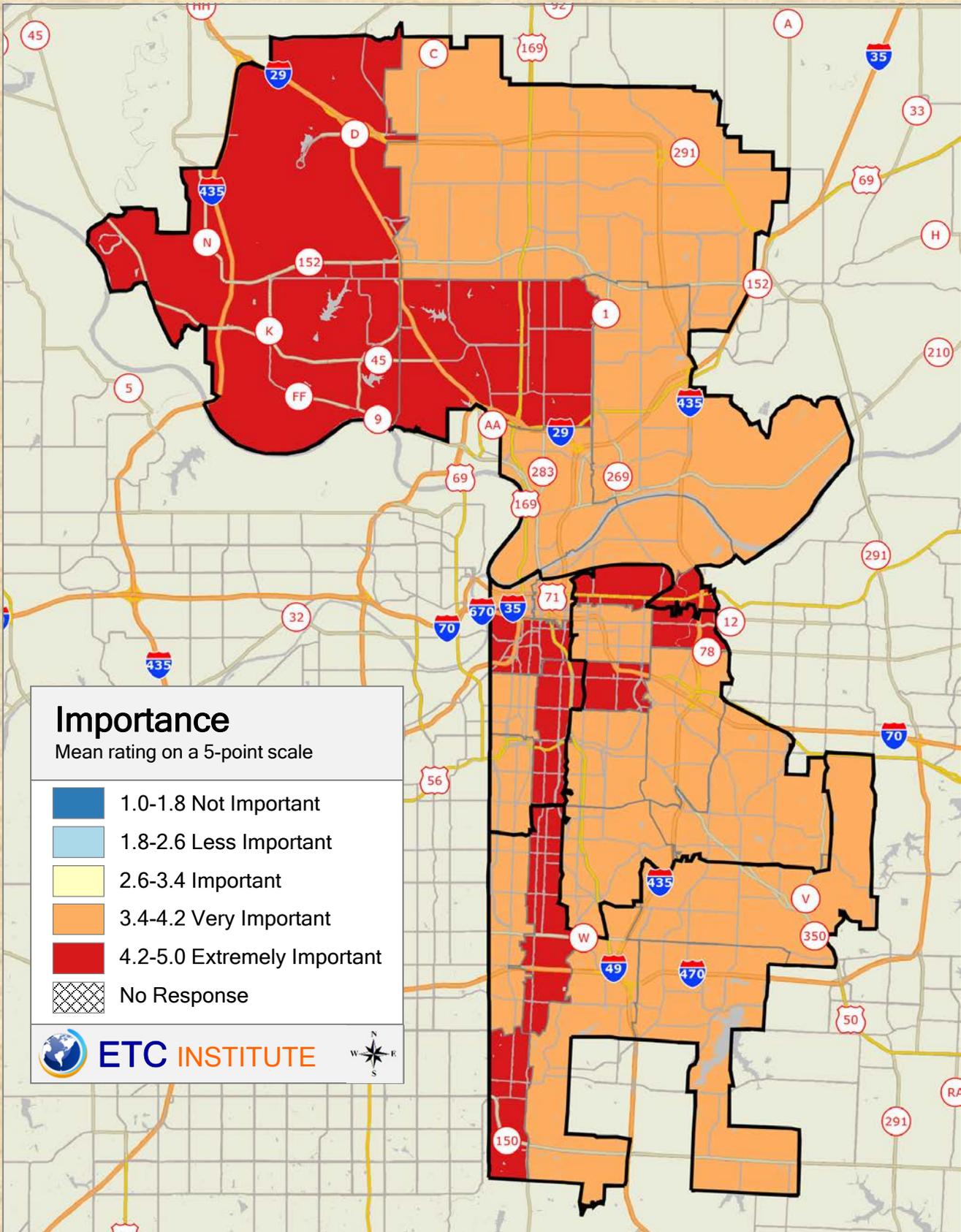
Q3.6 Importance of: Access to airports



2018 Kansas City, Missouri Employer Survey

Shading reflects the mean rating for all respondents by ZIP Code (merged as needed)

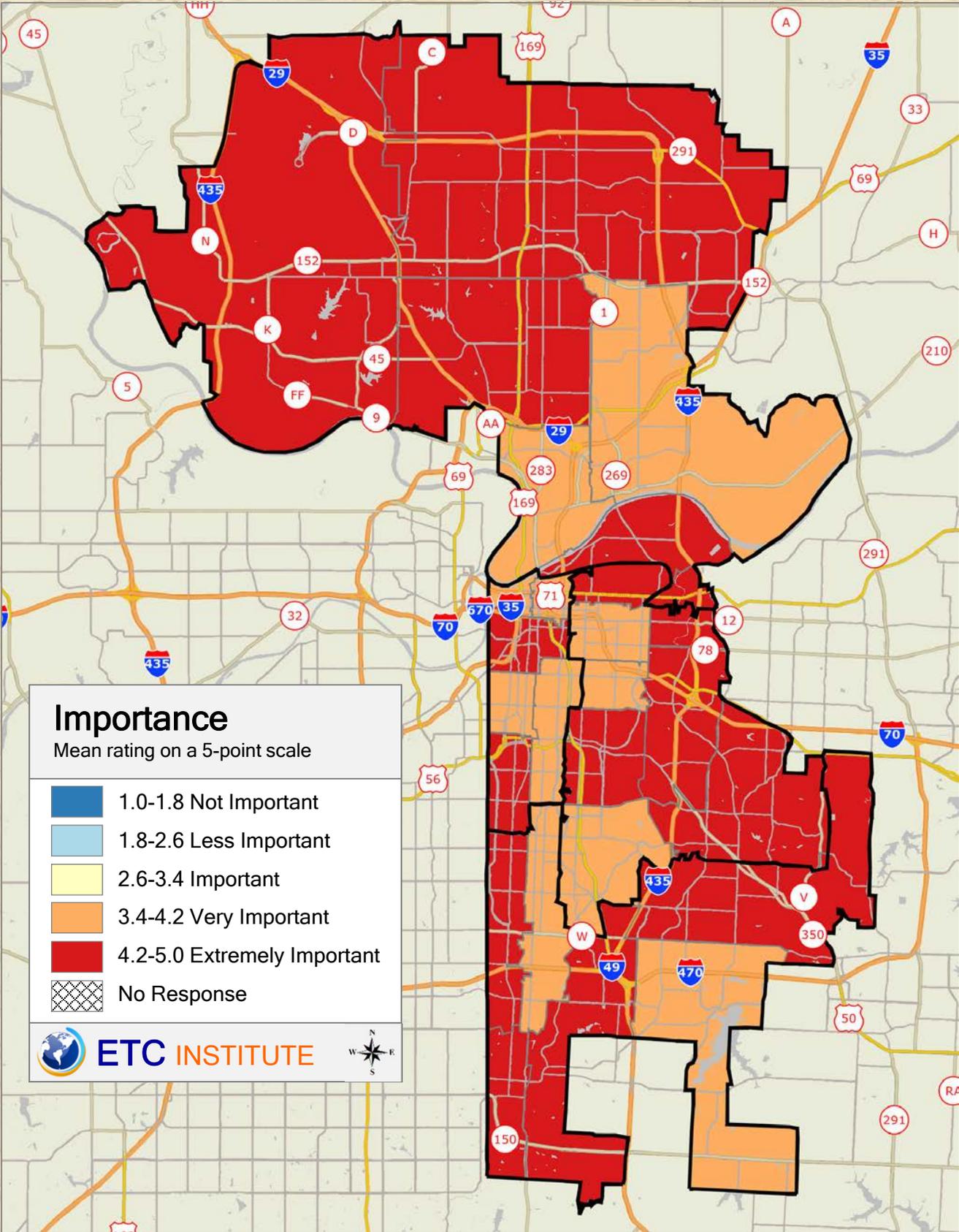
Q3.11 Importance of: Attitude of local government toward business



2018 Kansas City, Missouri Employer Survey

Shading reflects the mean rating for all respondents by ZIP Code (merged as needed)

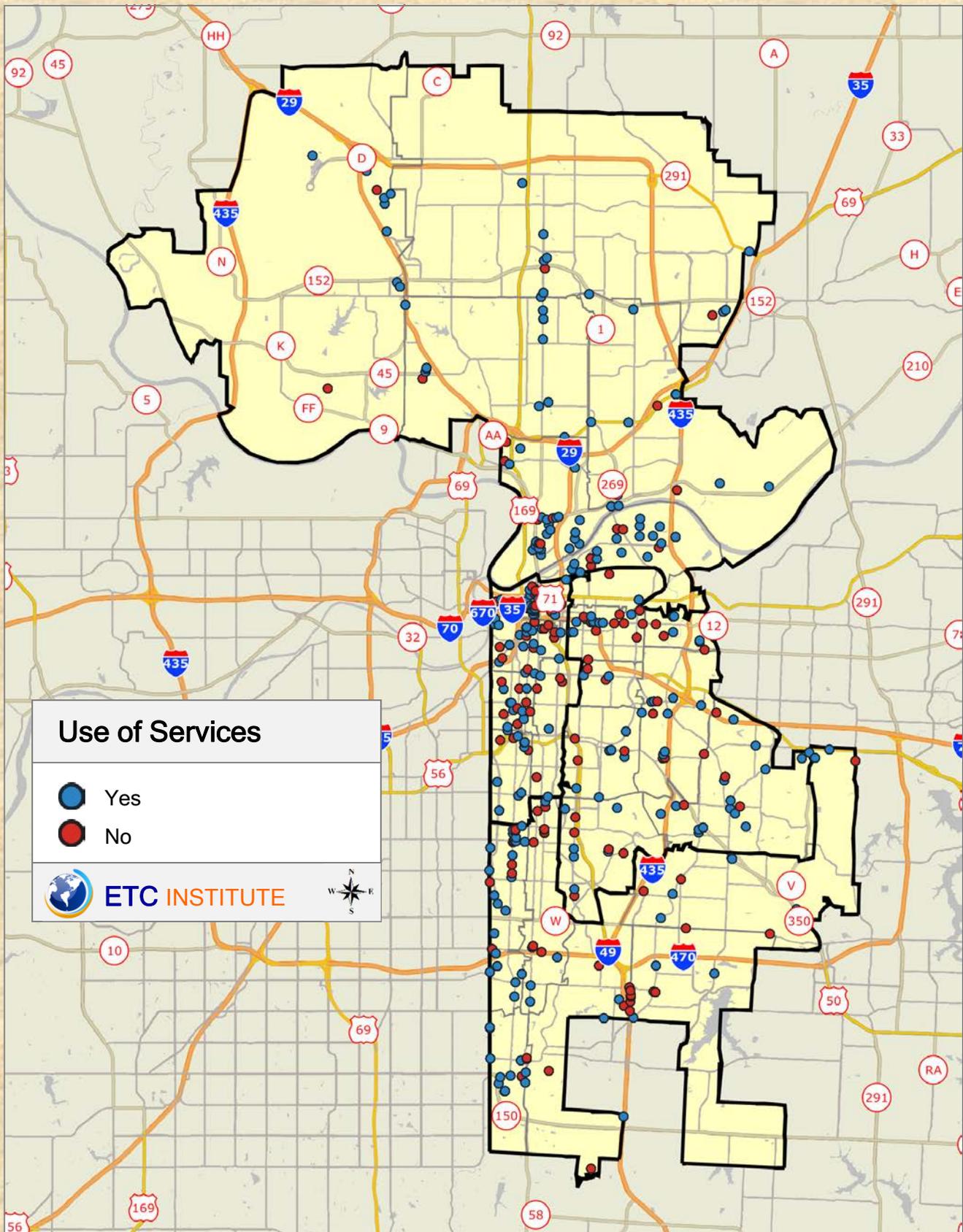
Q3.12 Importance of: Availability of telecommunications, utilities, and other infrastructure



2018 Kansas City, Missouri Employer Survey

Shading reflects the mean rating for all respondents by ZIP Code (merged as needed)

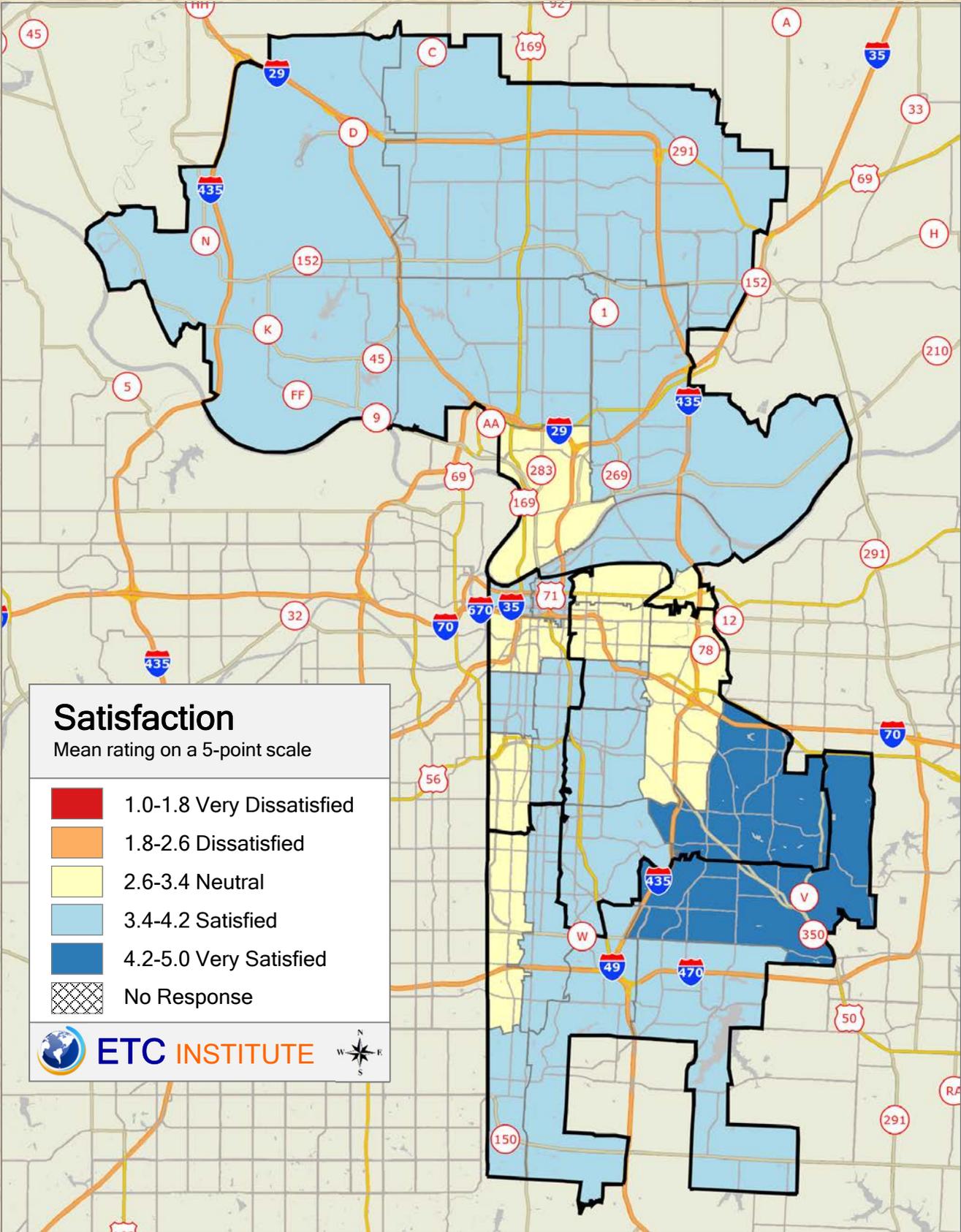
Q4a.1 Have you used: 311 call center



2018 Kansas City, Missouri Employer Survey

Shading reflects the mean rating for all respondents by ZIP Code (merged as needed)

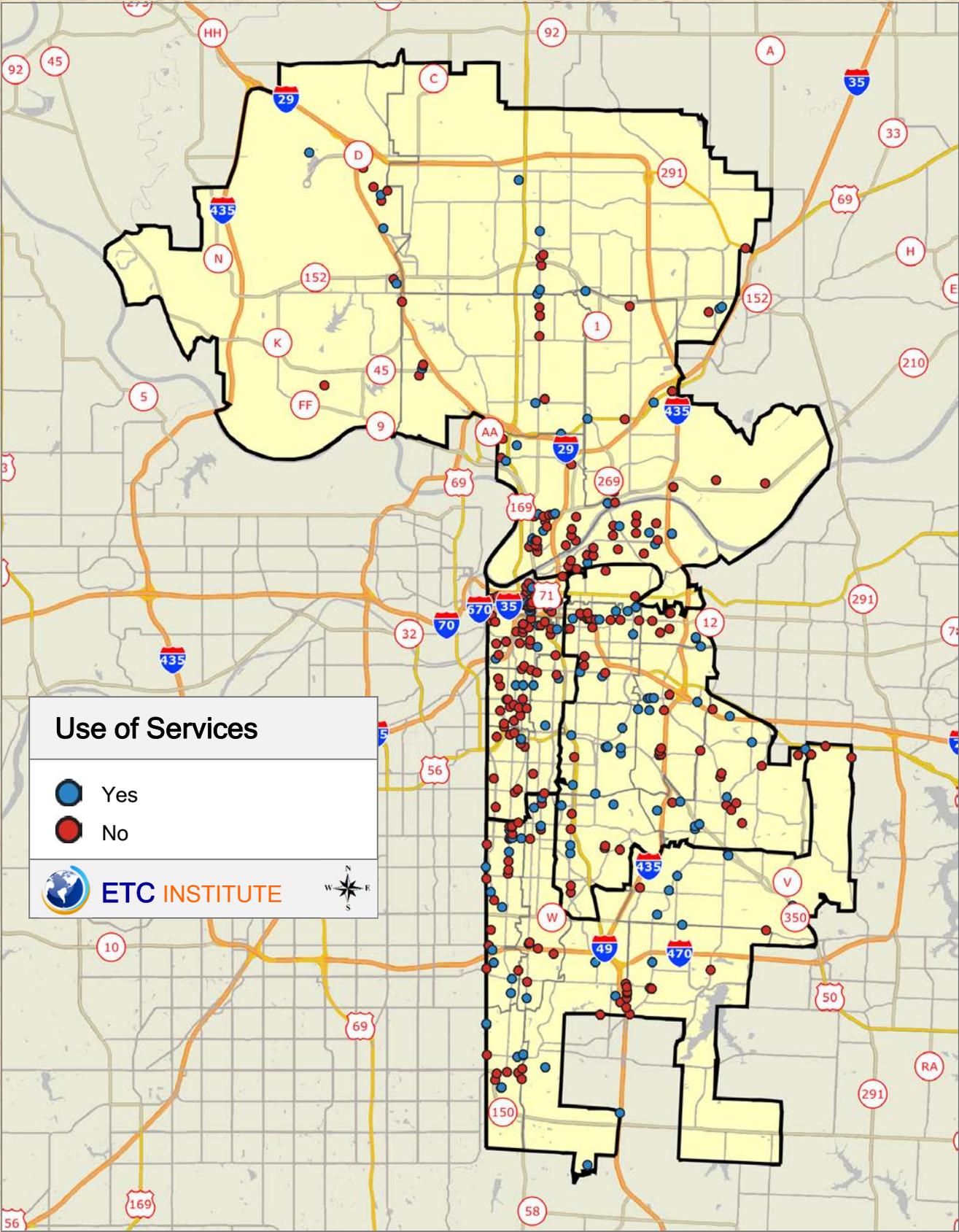
Q4b.1 Satisfaction with: 311 call center



2018 Kansas City, Missouri Employer Survey

Shading reflects the mean rating for all respondents by ZIP Code (merged as needed)

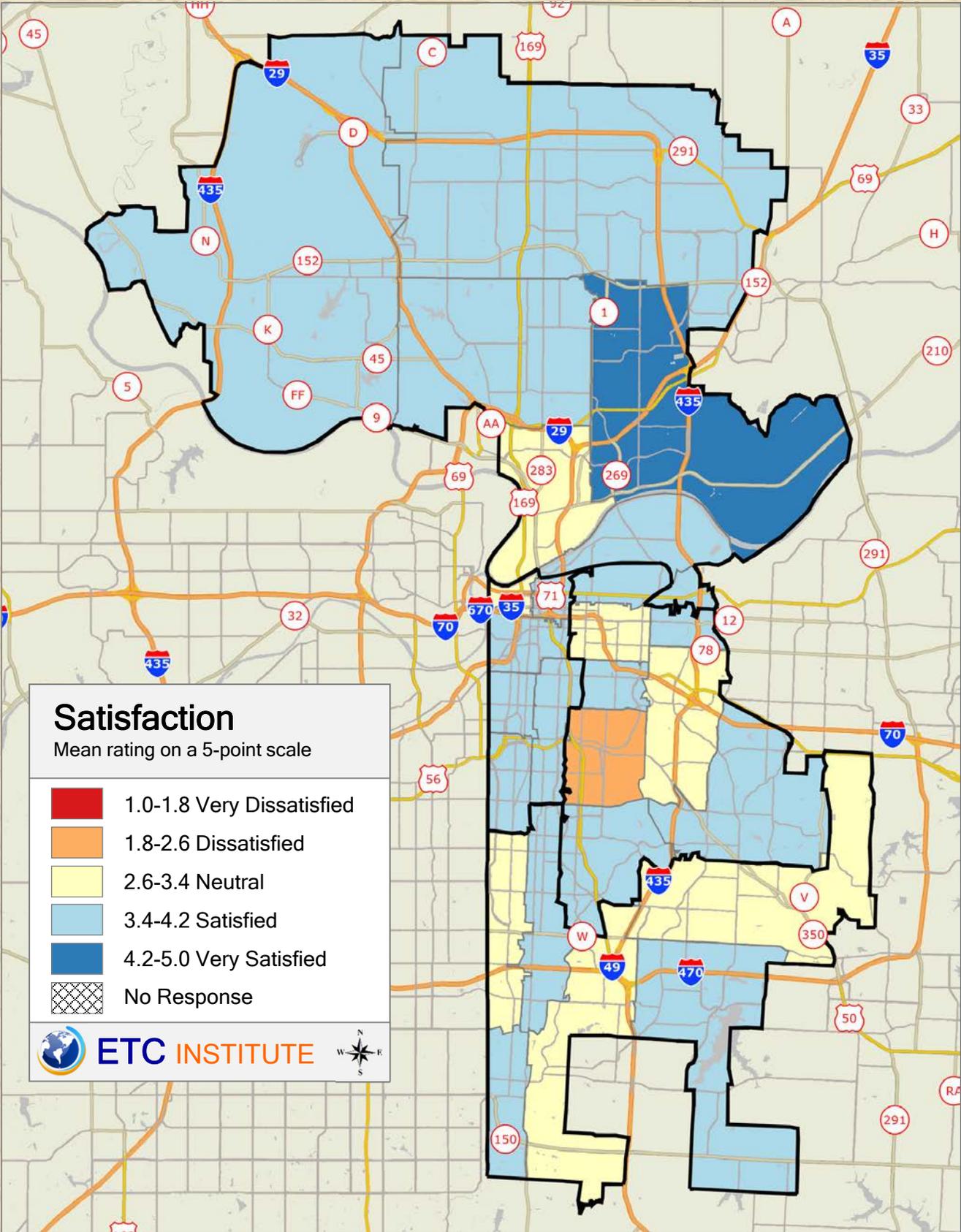
Q4a.2 Have you used: Business licensing



2018 Kansas City, Missouri Employer Survey

Shading reflects the mean rating for all respondents by ZIP Code (merged as needed)

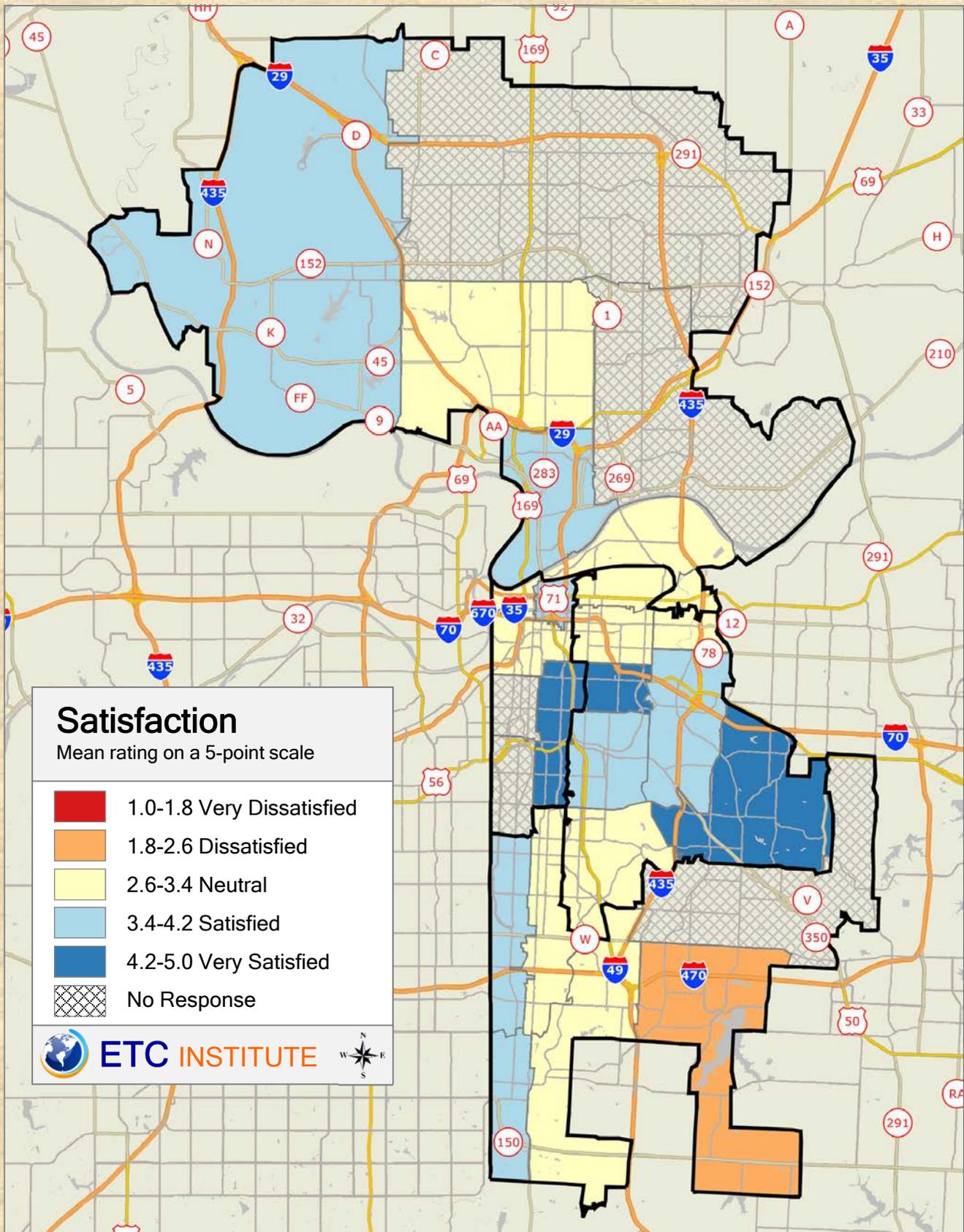
Q4b.3 Satisfaction with: Tax collection



2018 Kansas City, Missouri Employer Survey

Shading reflects the mean rating for all respondents by ZIP Code (merged as needed)

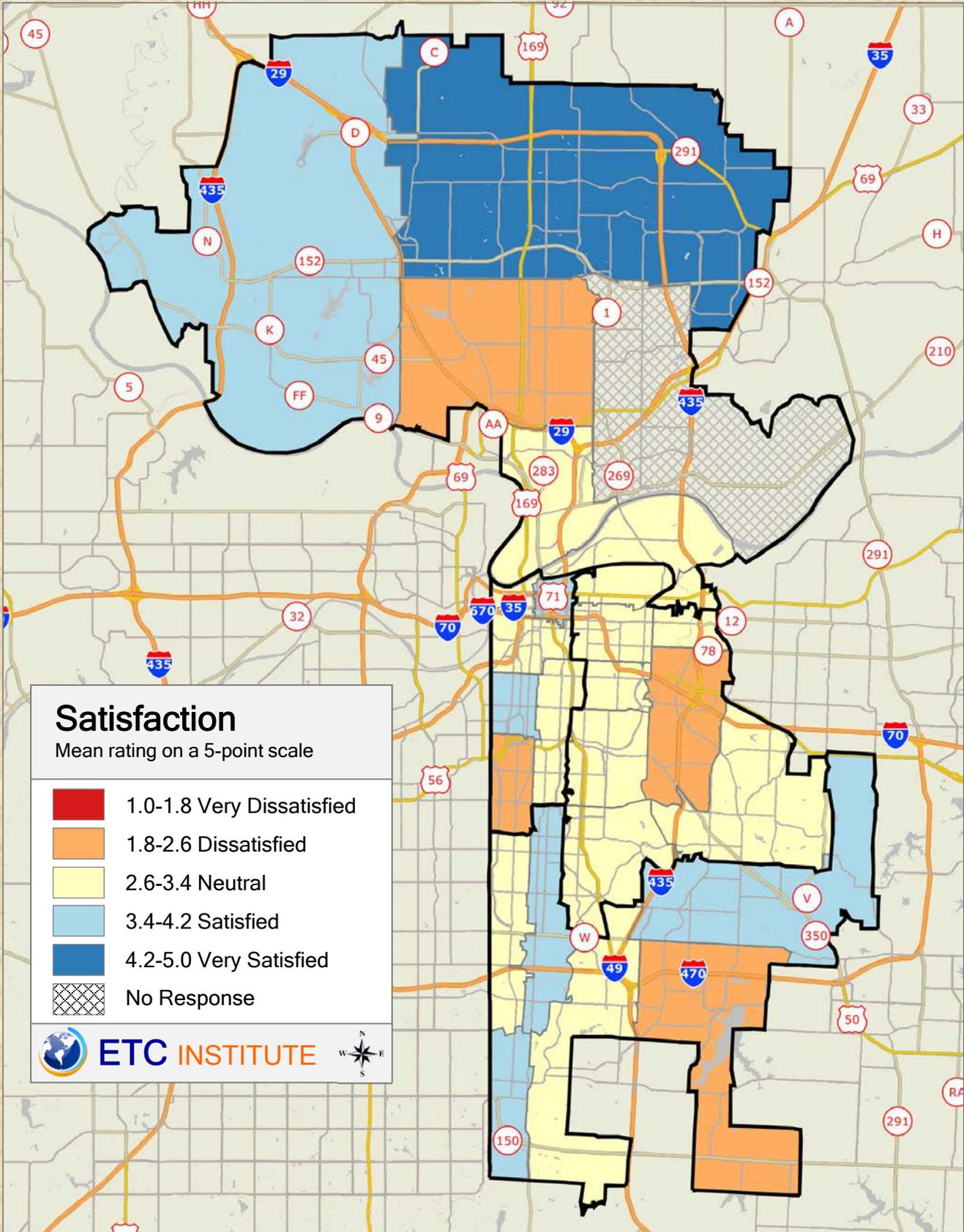
Q4b.4 Satisfaction with: Municipal court



2018 Kansas City, Missouri Employer Survey

Shading reflects the mean rating for all respondents by ZIP Code (merged as needed)

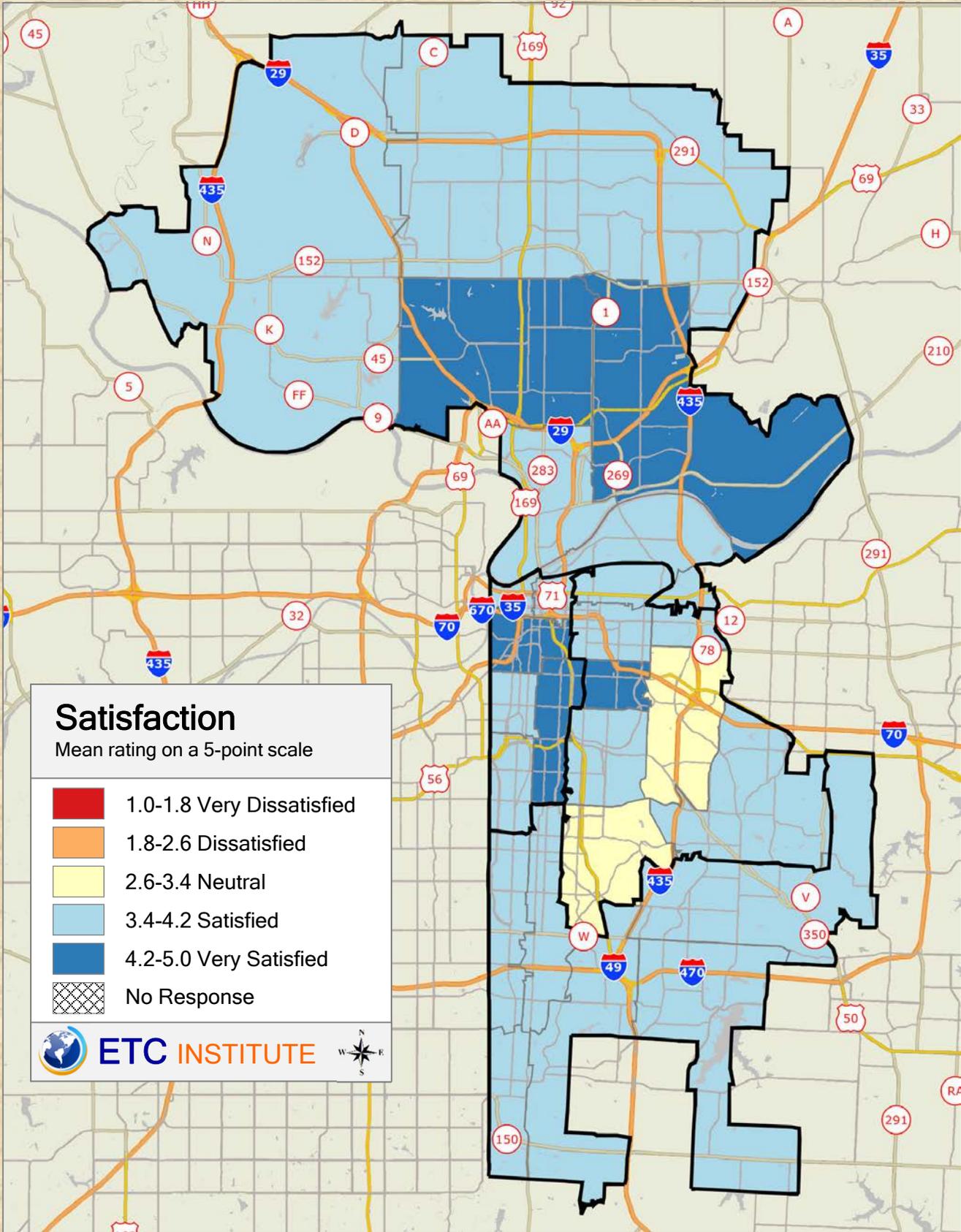
Q4b.5 Satisfaction with: Code enforcement



2018 Kansas City, Missouri Employer Survey

Shading reflects the mean rating for all respondents by ZIP Code (merged as needed)

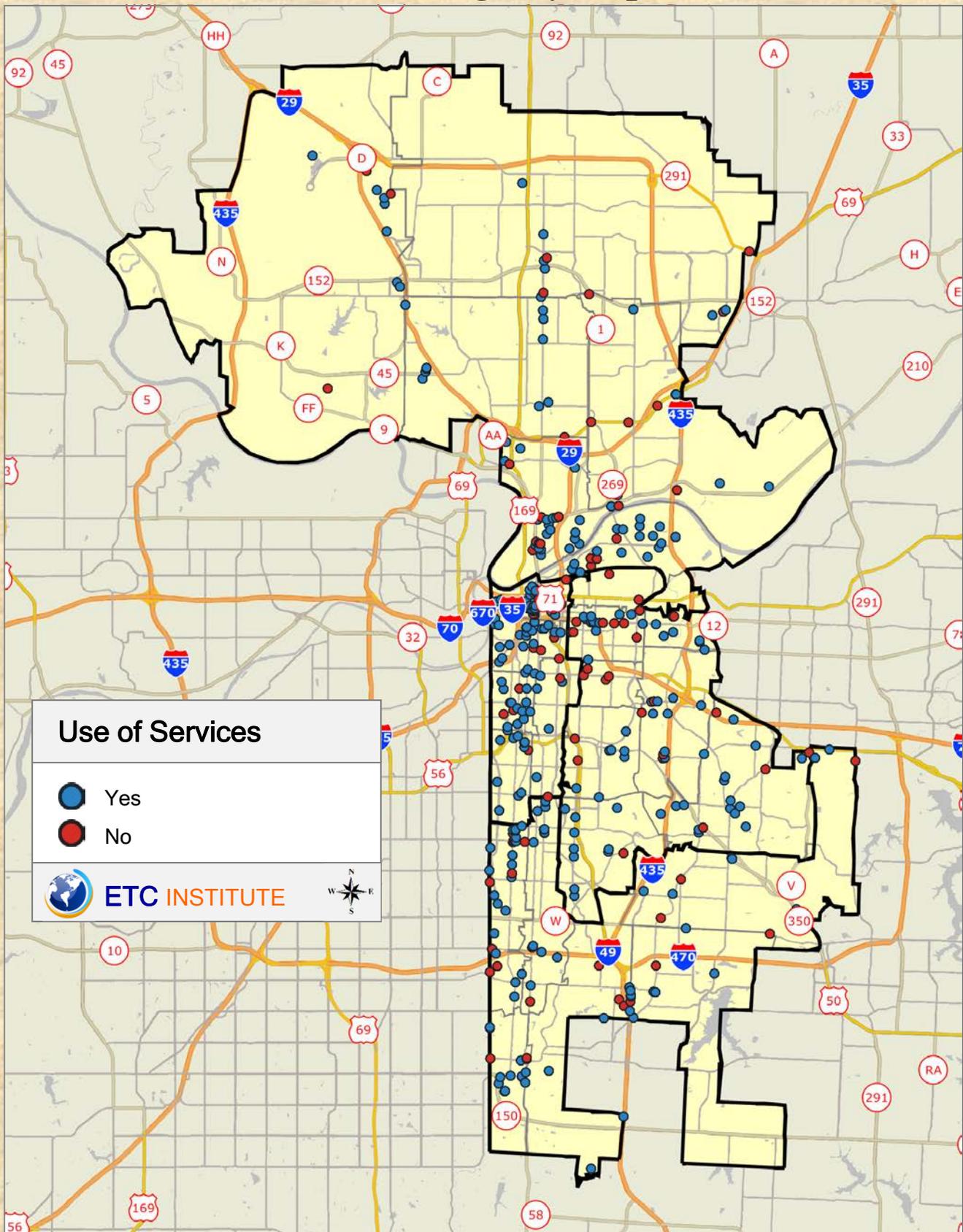
Q4b.6 Satisfaction with: Police - crime/safety response



2018 Kansas City, Missouri Employer Survey

Shading reflects the mean rating for all respondents by ZIP Code (merged as needed)

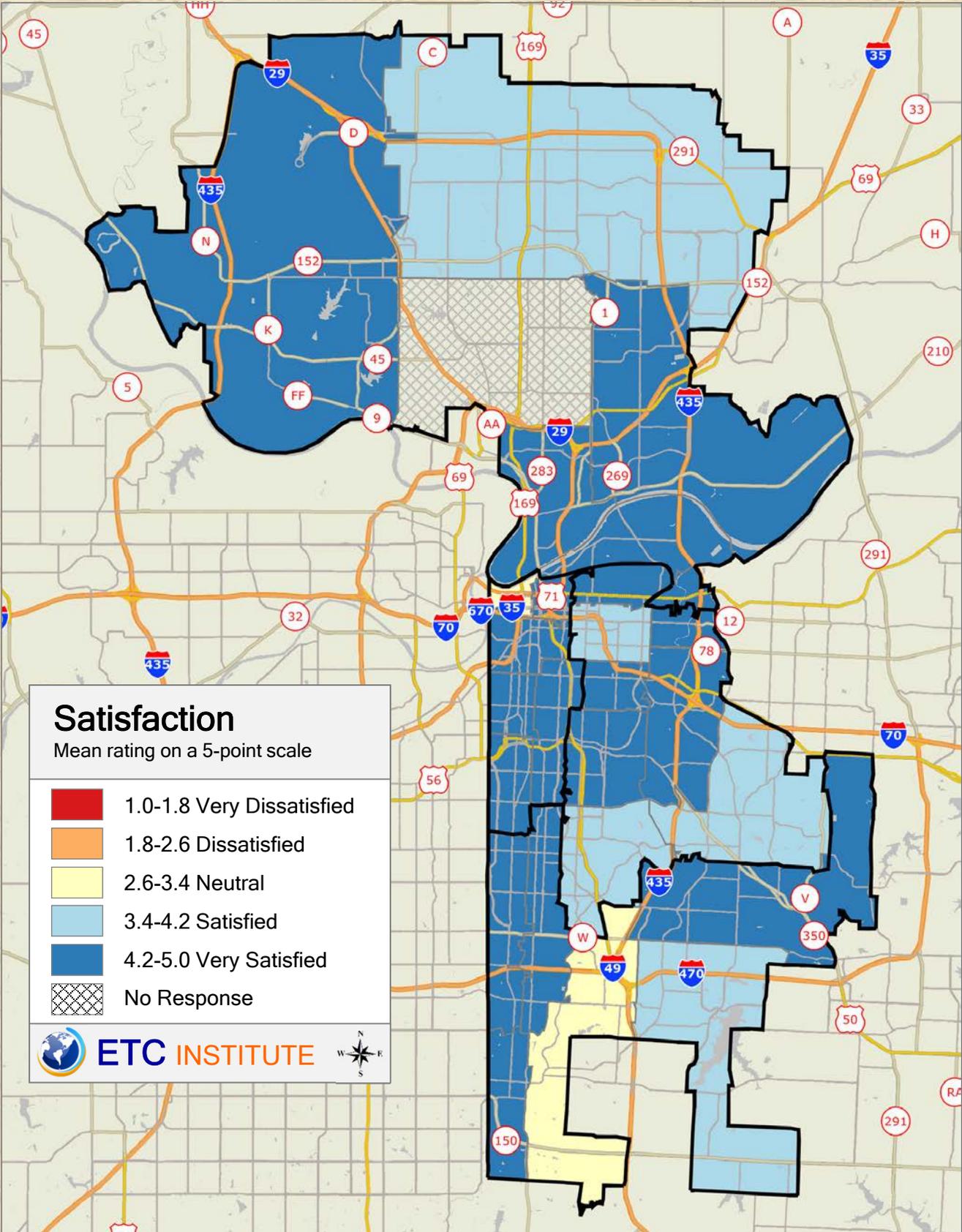
Q4a.7 Have you used: Ambulance – medical emergency response



2018 Kansas City, Missouri Employer Survey

Shading reflects the mean rating for all respondents by ZIP Code (merged as needed)

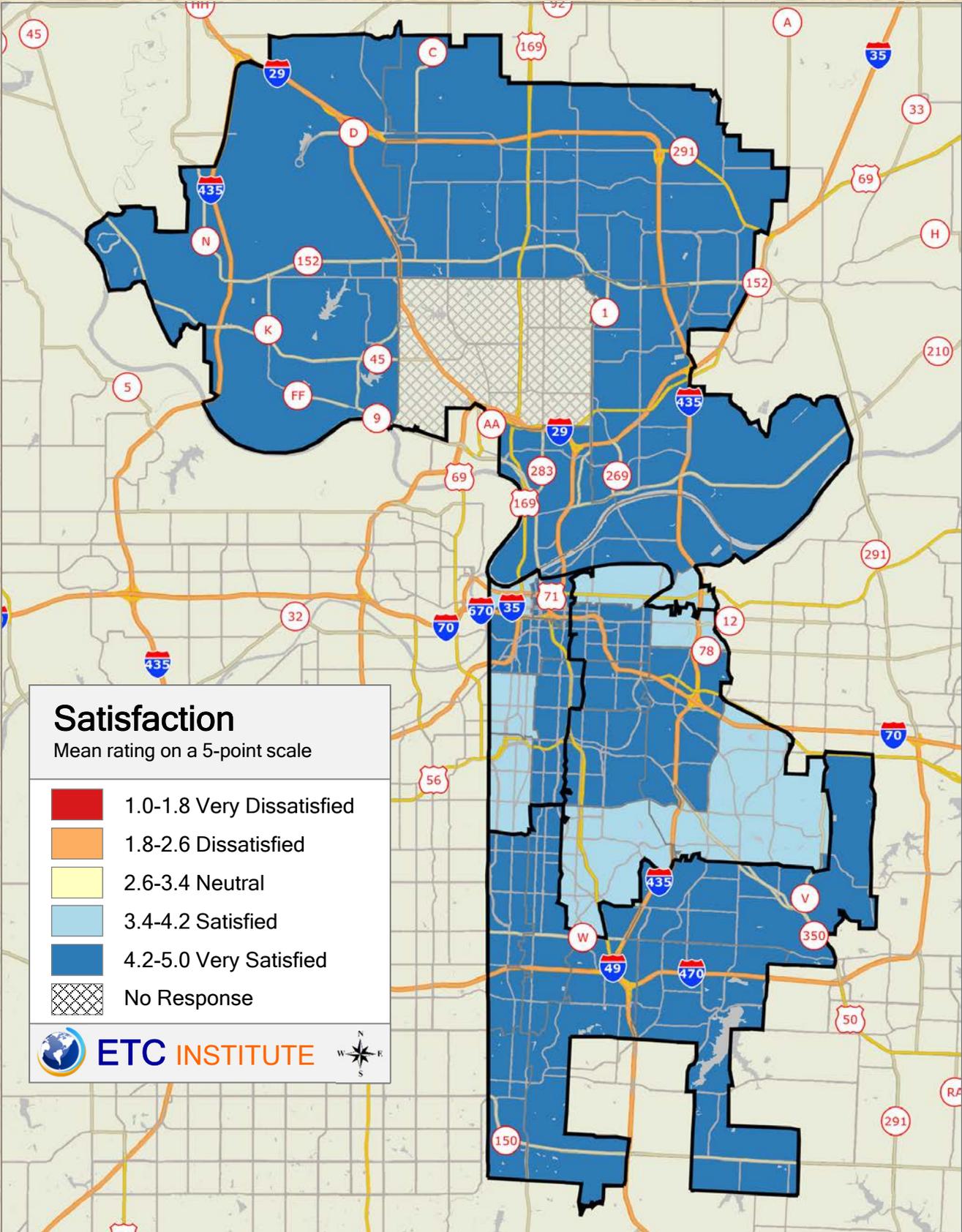
Q4b.7 Satisfaction with: Ambulance – medical emergency response



2018 Kansas City, Missouri Employer Survey

Shading reflects the mean rating for all respondents by ZIP Code (merged as needed)

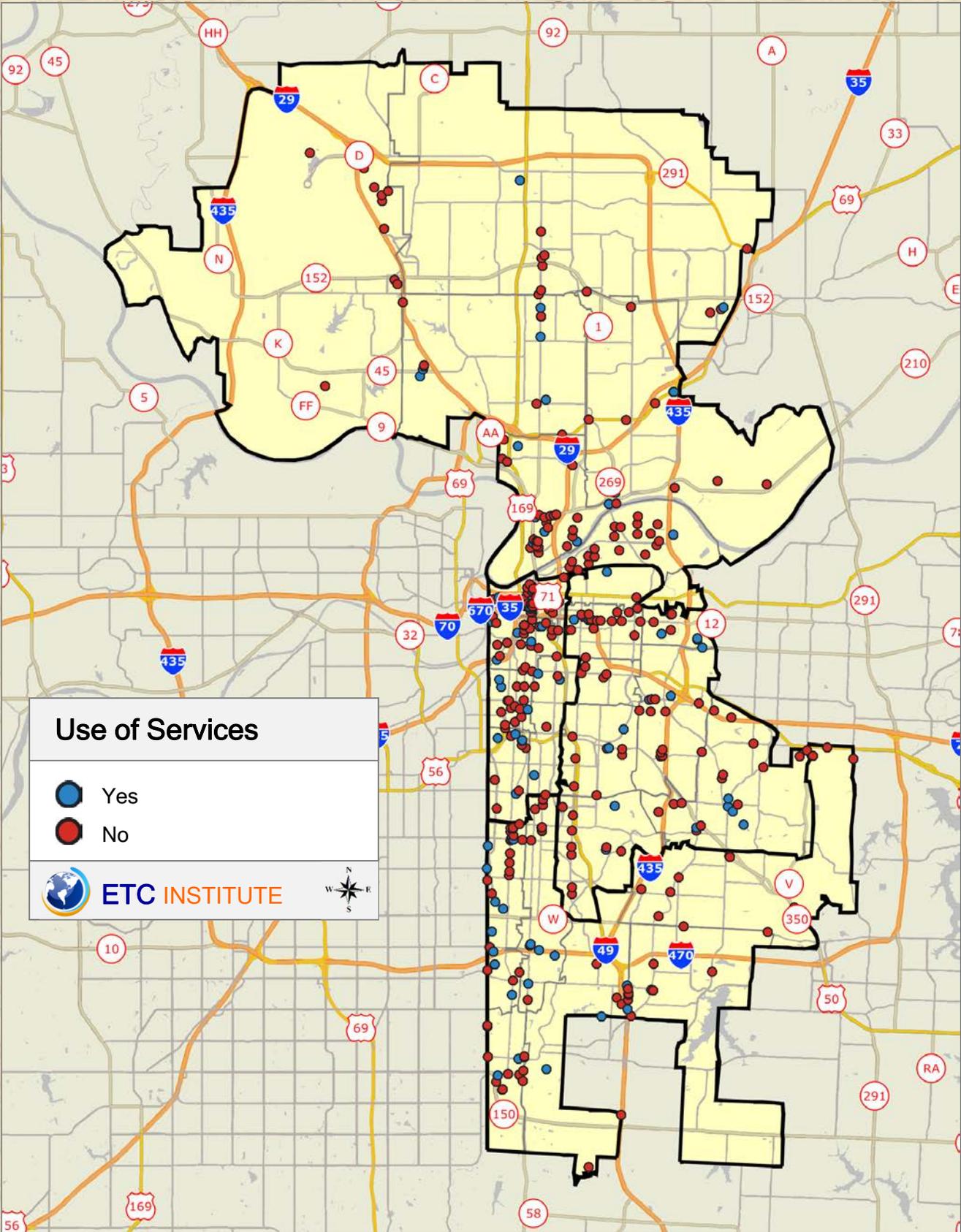
Q4b.8 Satisfaction with: Fire incident response



2018 Kansas City, Missouri Employer Survey

Shading reflects the mean rating for all respondents by ZIP Code (merged as needed)

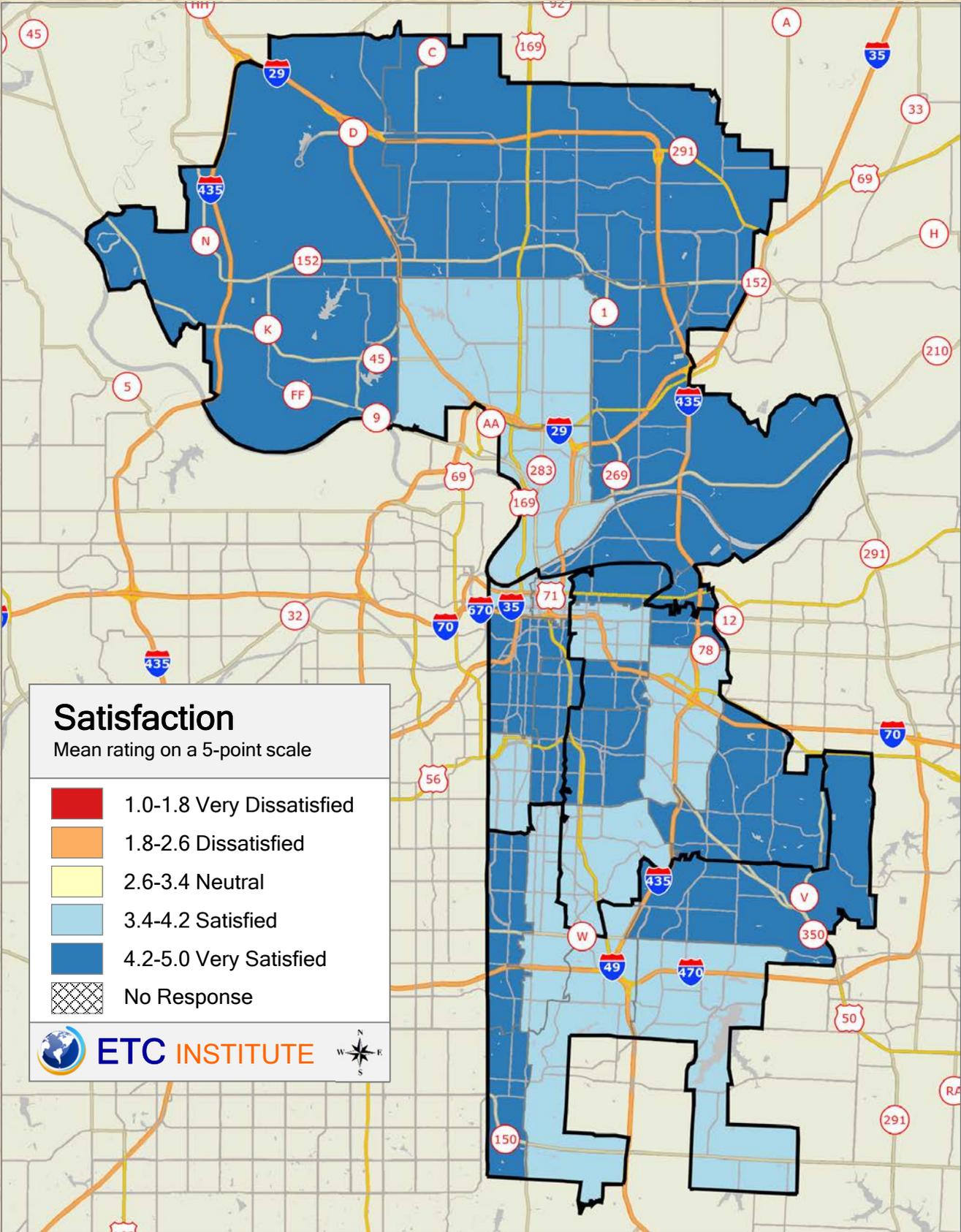
Q4a.9 Have you used: Fire inspection



2018 Kansas City, Missouri Employer Survey

Shading reflects the mean rating for all respondents by ZIP Code (merged as needed)

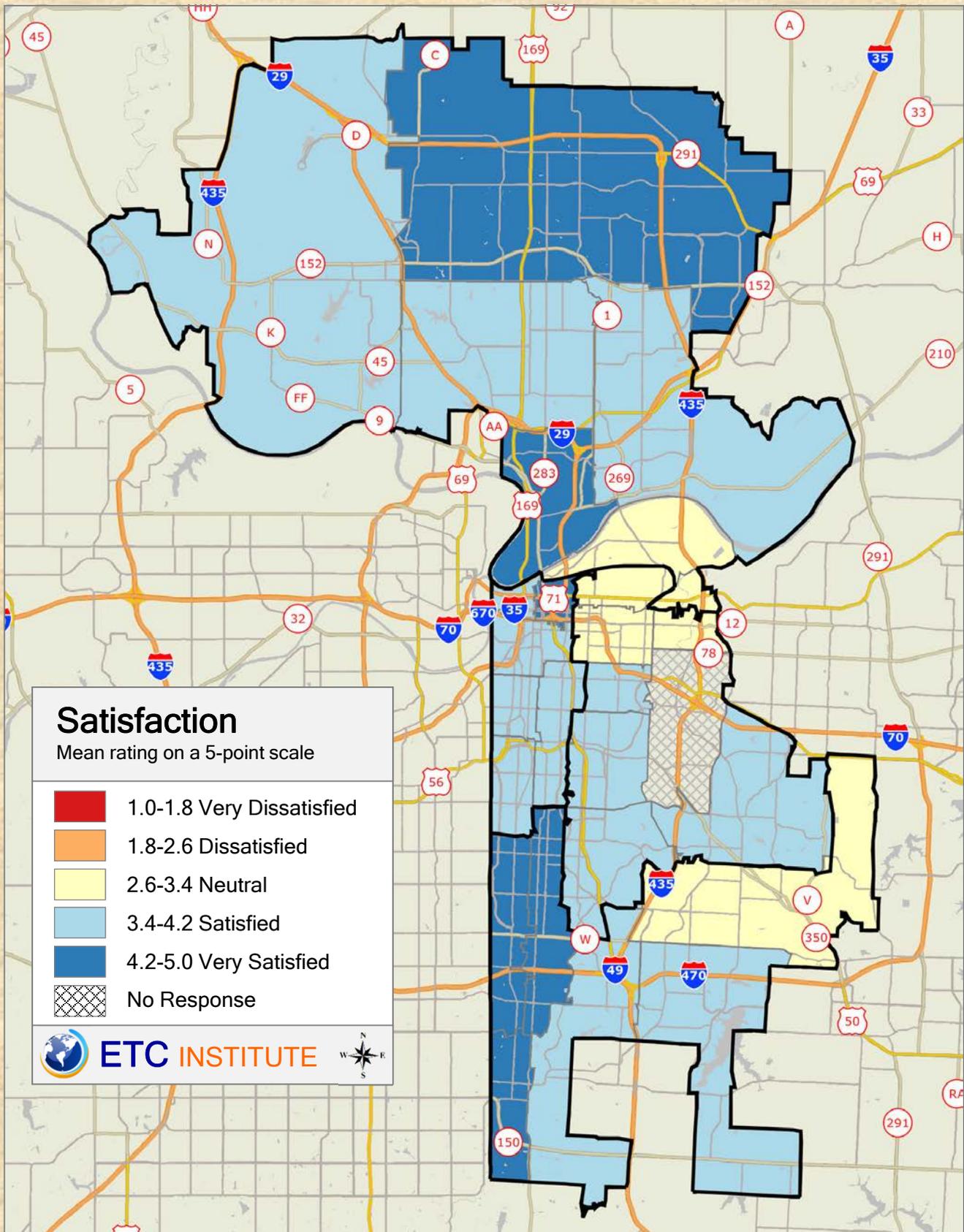
Q4b.9 Satisfaction with: Fire inspection



2018 Kansas City, Missouri Employer Survey

Shading reflects the mean rating for all respondents by ZIP Code (merged as needed)

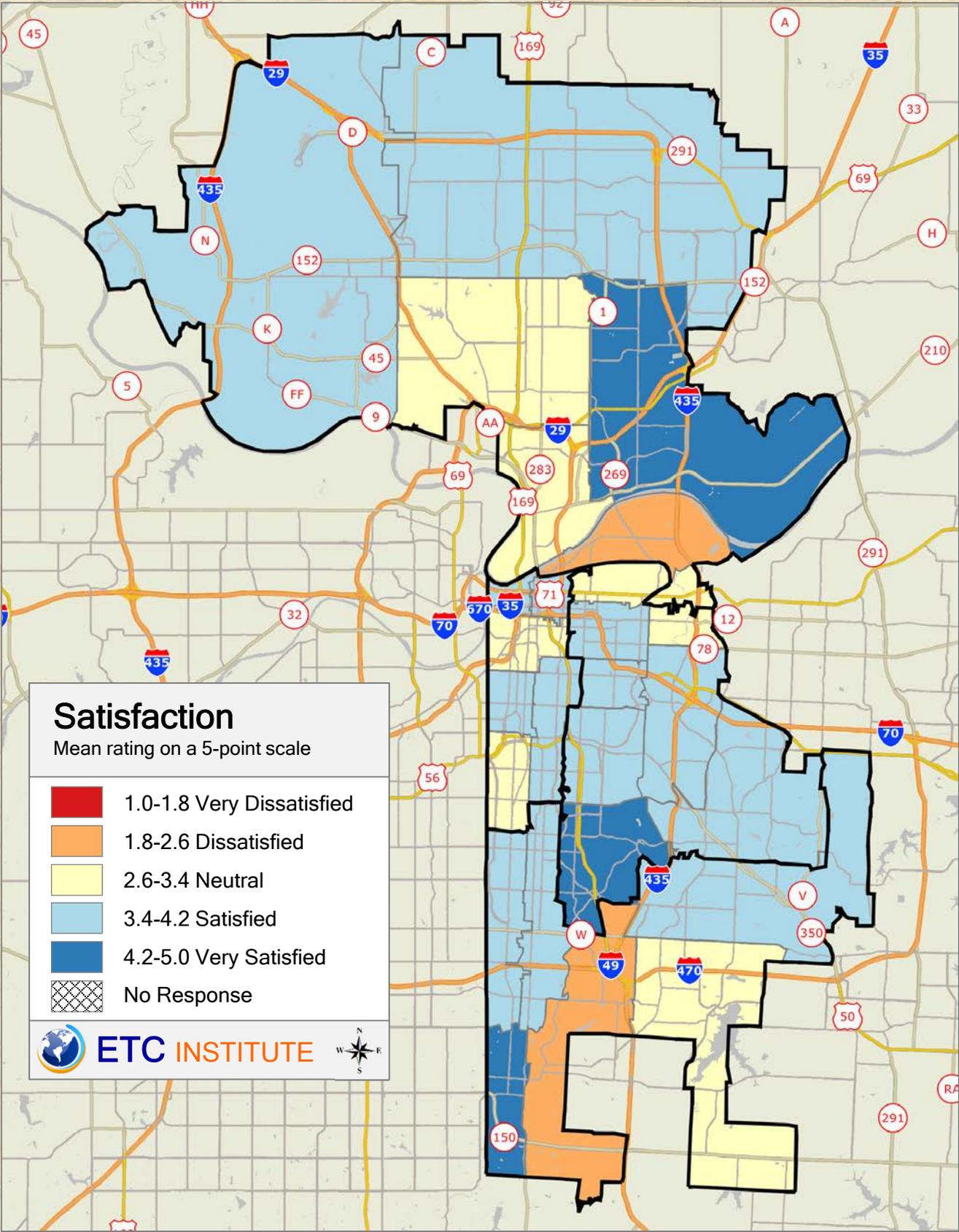
Q4b.10 Satisfaction with: Health inspections



2018 Kansas City, Missouri Employer Survey

Shading reflects the mean rating for all respondents by ZIP Code (merged as needed)

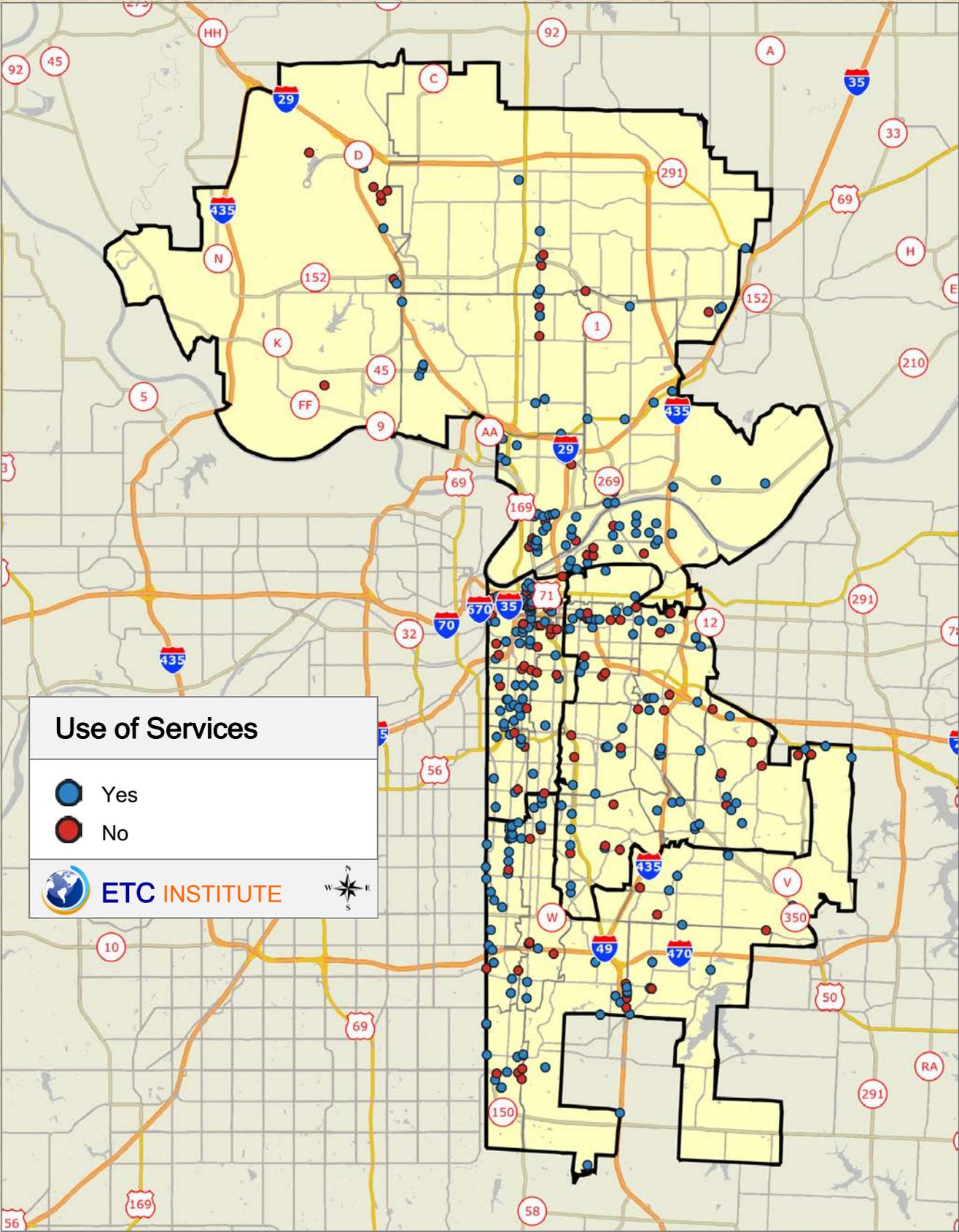
Q4b.11 Satisfaction with: Regulated Industries licensing/inspections



2018 Kansas City, Missouri Employer Survey

Shading reflects the mean rating for all respondents by ZIP Code (merged as needed)

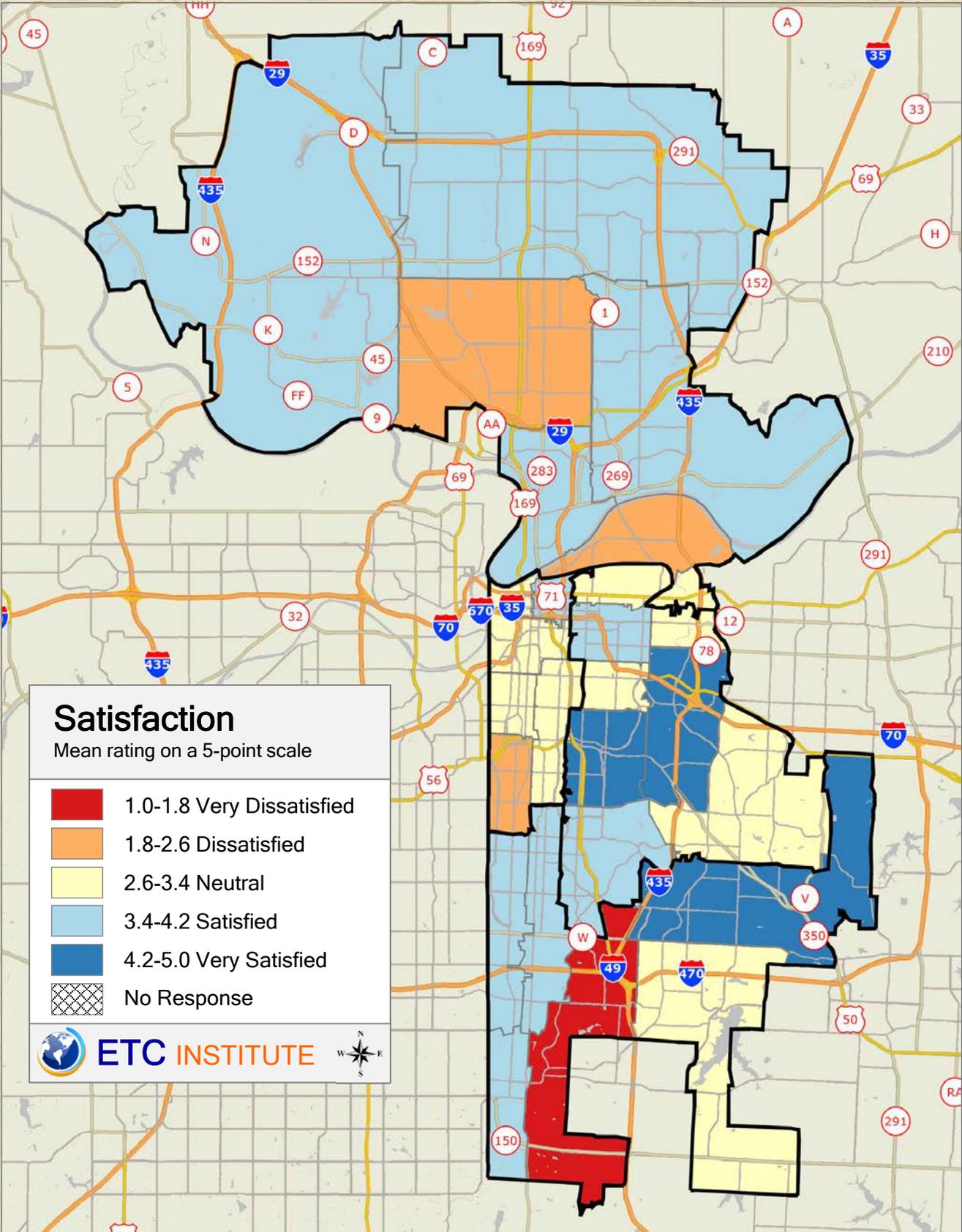
Q4a.12 Have you used: Building permits



2018 Kansas City, Missouri Employer Survey

Shading reflects the mean rating for all respondents by ZIP Code (merged as needed)

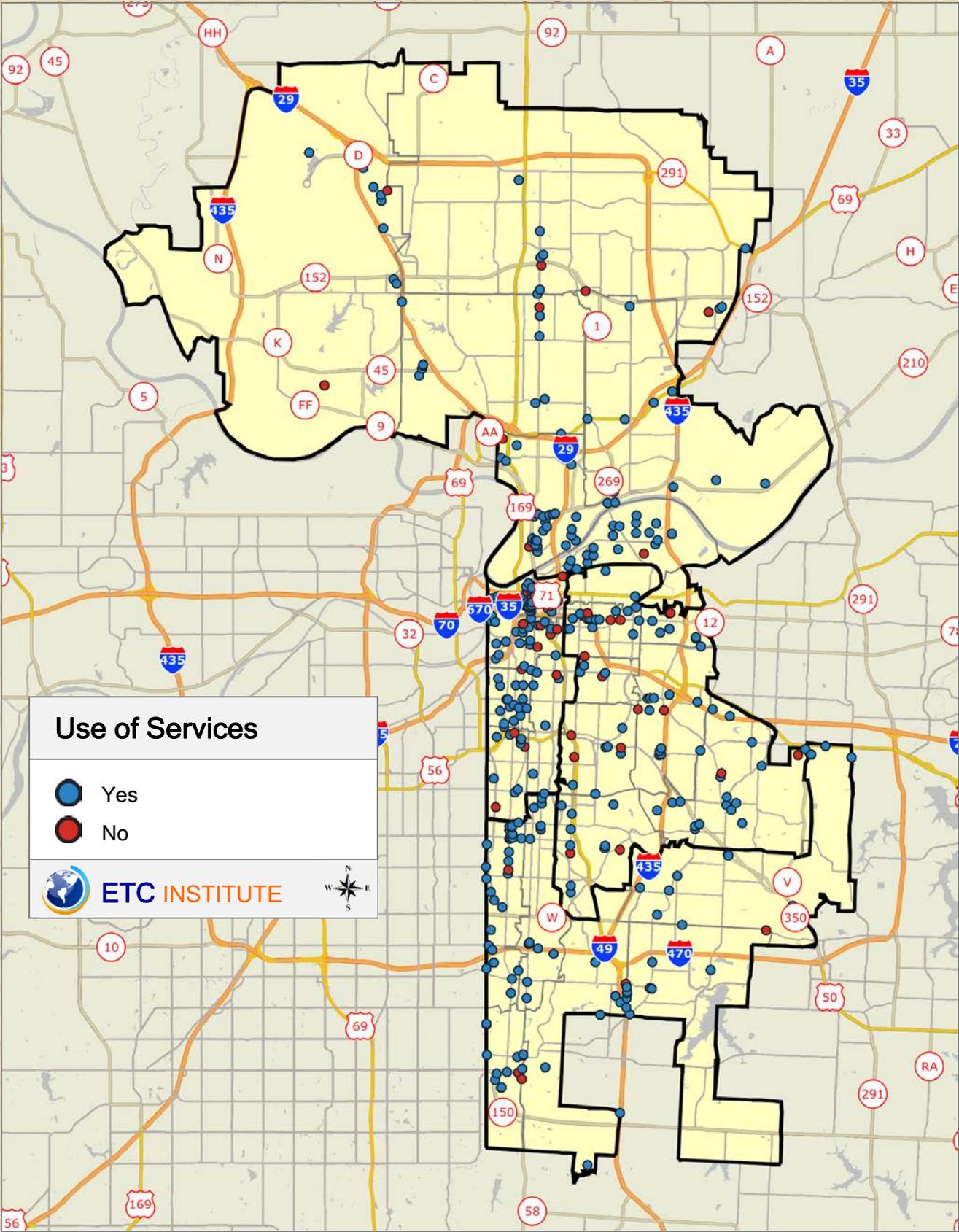
Q4b.12 Satisfaction with: Building permits



2018 Kansas City, Missouri Employer Survey

Shading reflects the mean rating for all respondents by ZIP Code (merged as needed)

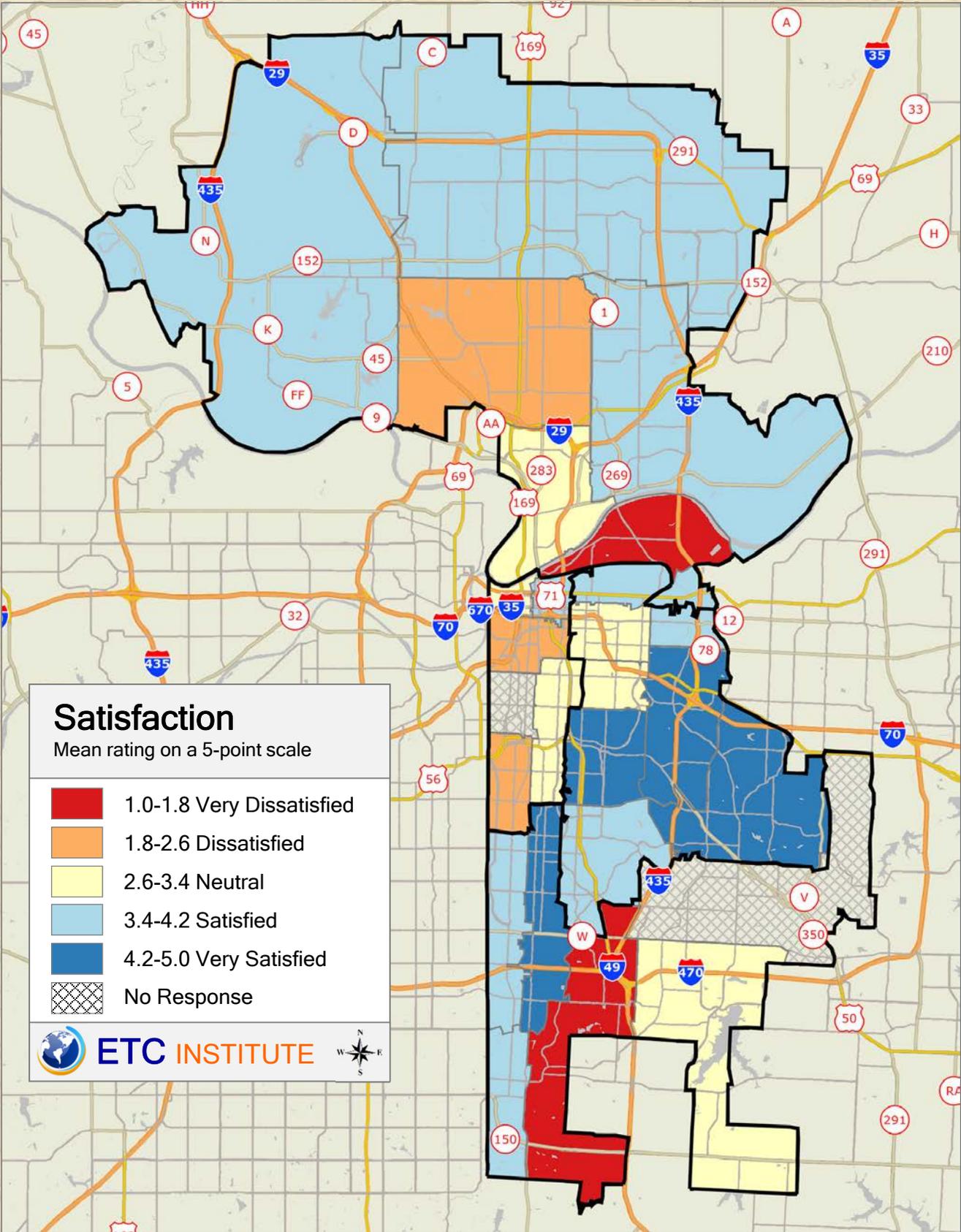
Q4a.13 Have you used: Development review



2018 Kansas City, Missouri Employer Survey

Shading reflects the mean rating for all respondents by ZIP Code (merged as needed)

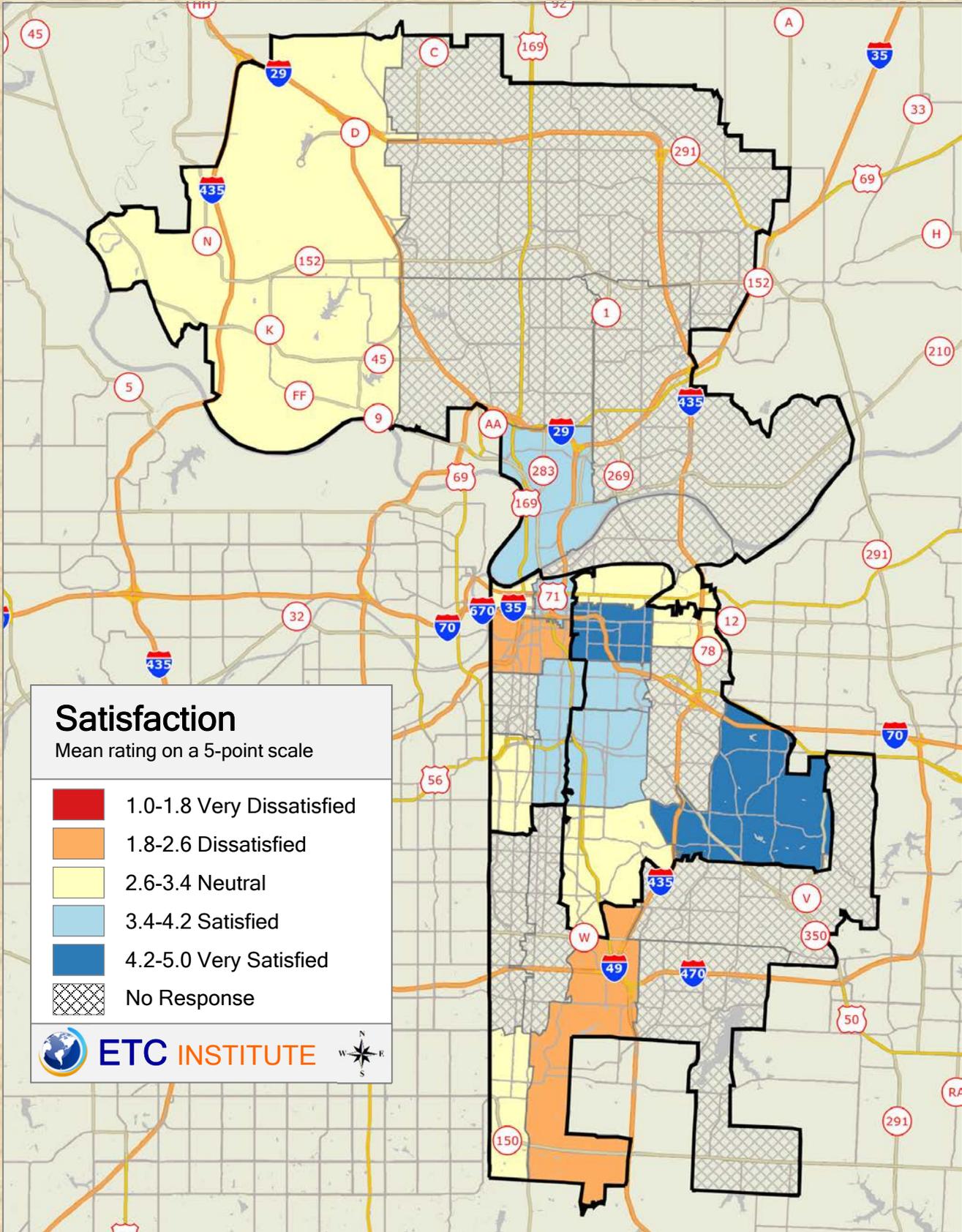
Q4b.13 Satisfaction with: Development review



2018 Kansas City, Missouri Employer Survey

Shading reflects the mean rating for all respondents by ZIP Code (merged as needed)

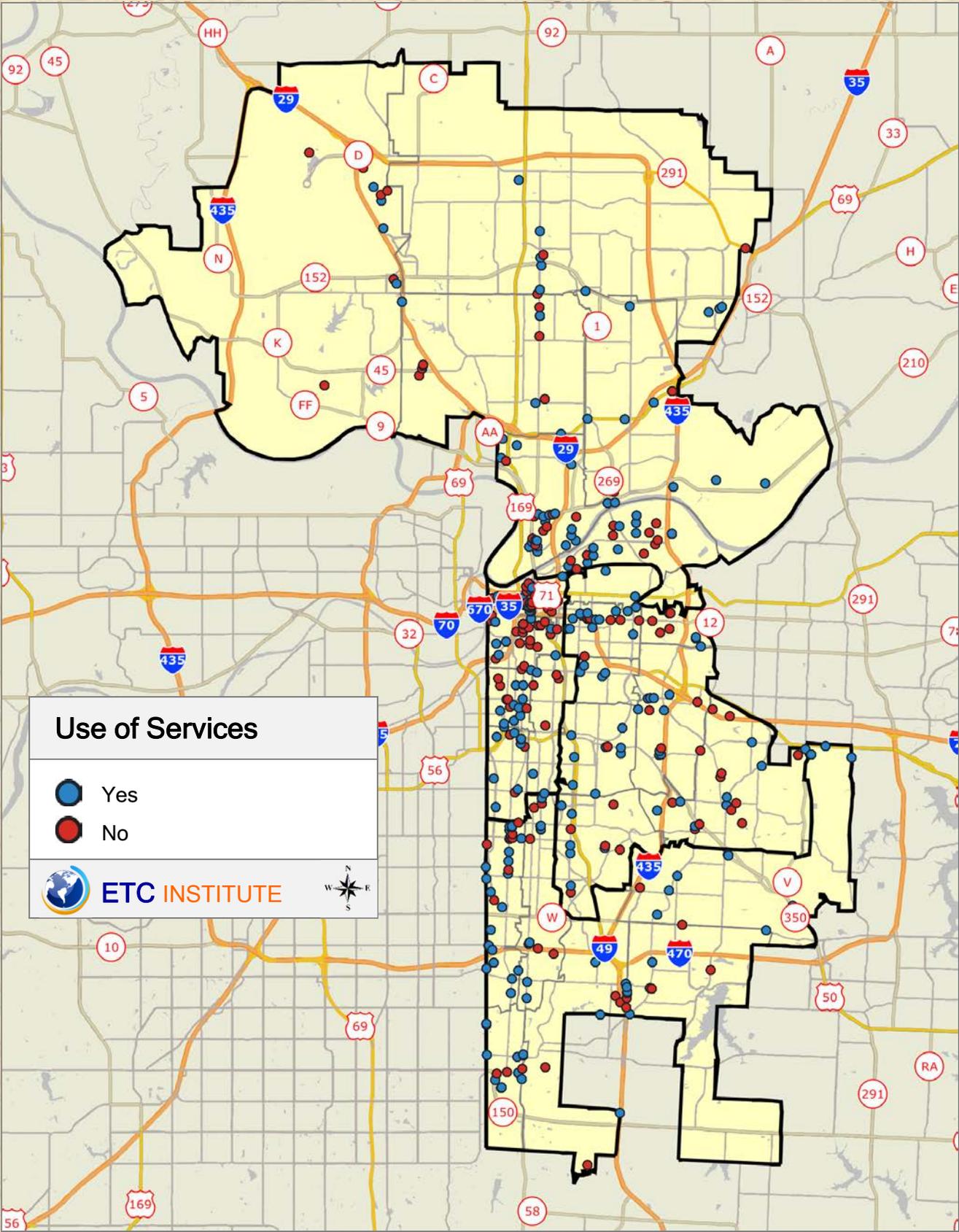
Q4b.14 Satisfaction with: Public incentives requests



2018 Kansas City, Missouri Employer Survey

Shading reflects the mean rating for all respondents by ZIP Code (merged as needed)

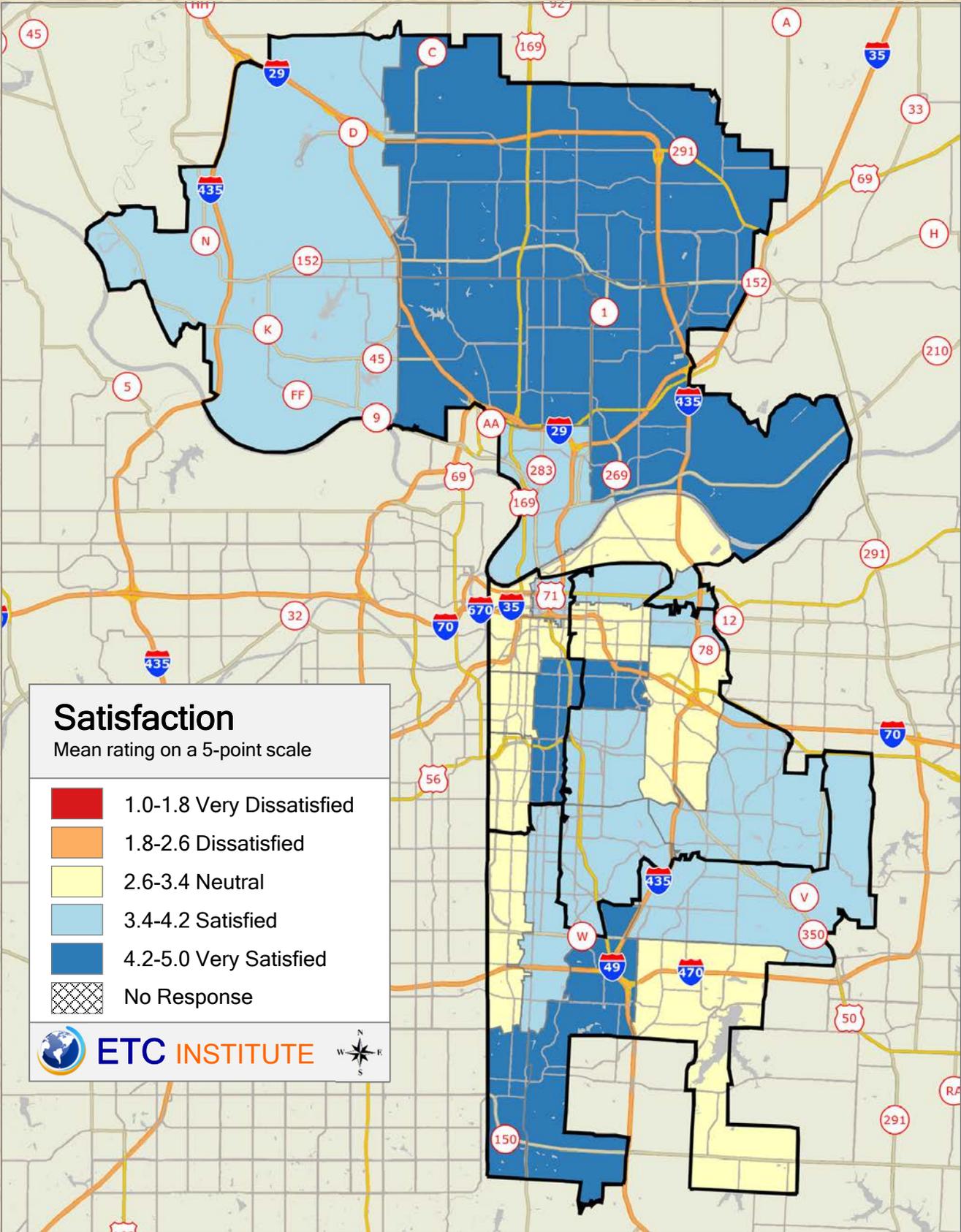
Q4a.15 Have you used: Airport services



2018 Kansas City, Missouri Employer Survey

Shading reflects the mean rating for all respondents by ZIP Code (merged as needed)

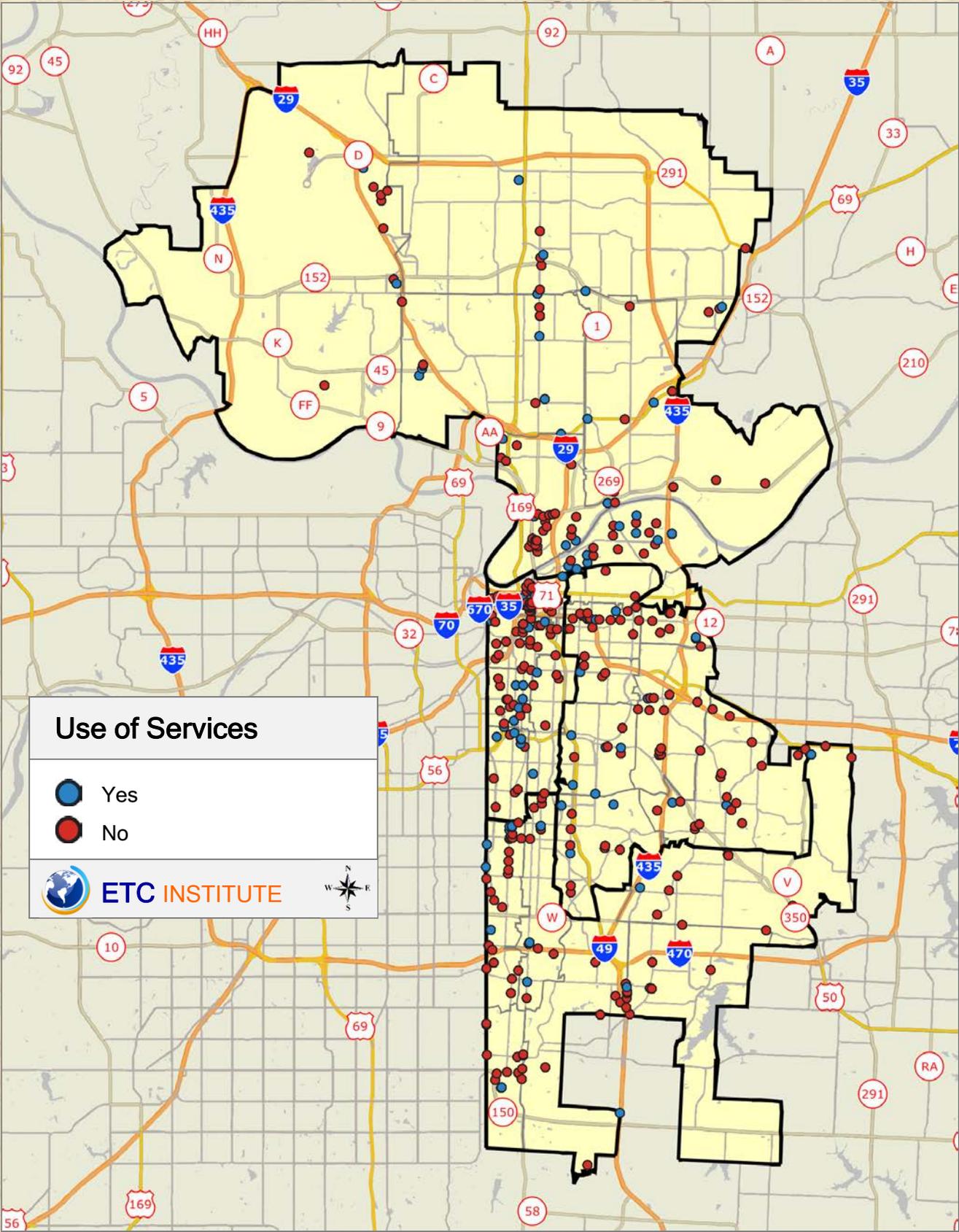
Q4b.15 Satisfaction with: Airport services



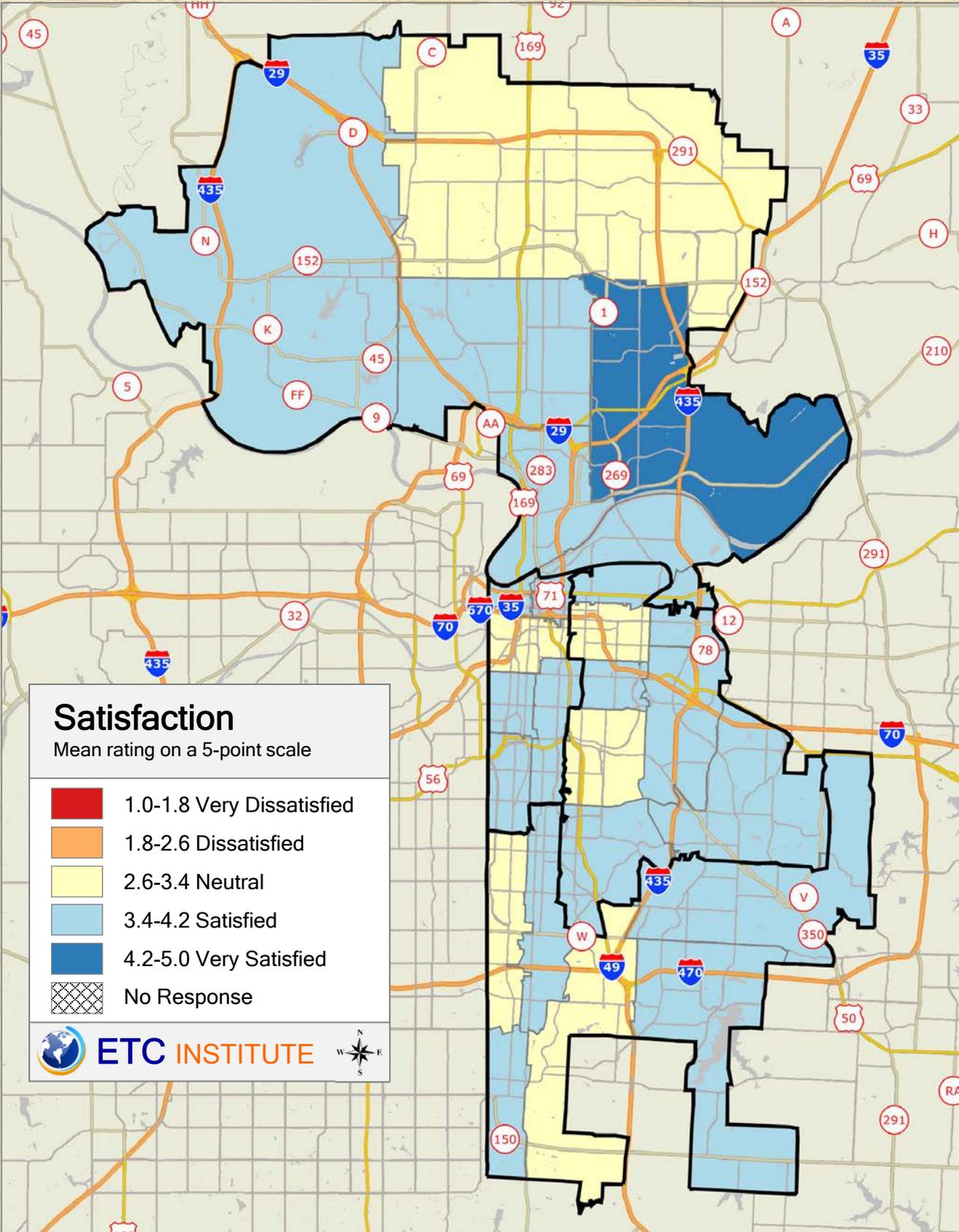
2018 Kansas City, Missouri Employer Survey

Shading reflects the mean rating for all respondents by ZIP Code (merged as needed)

Q4a.16 Have you used: Water services



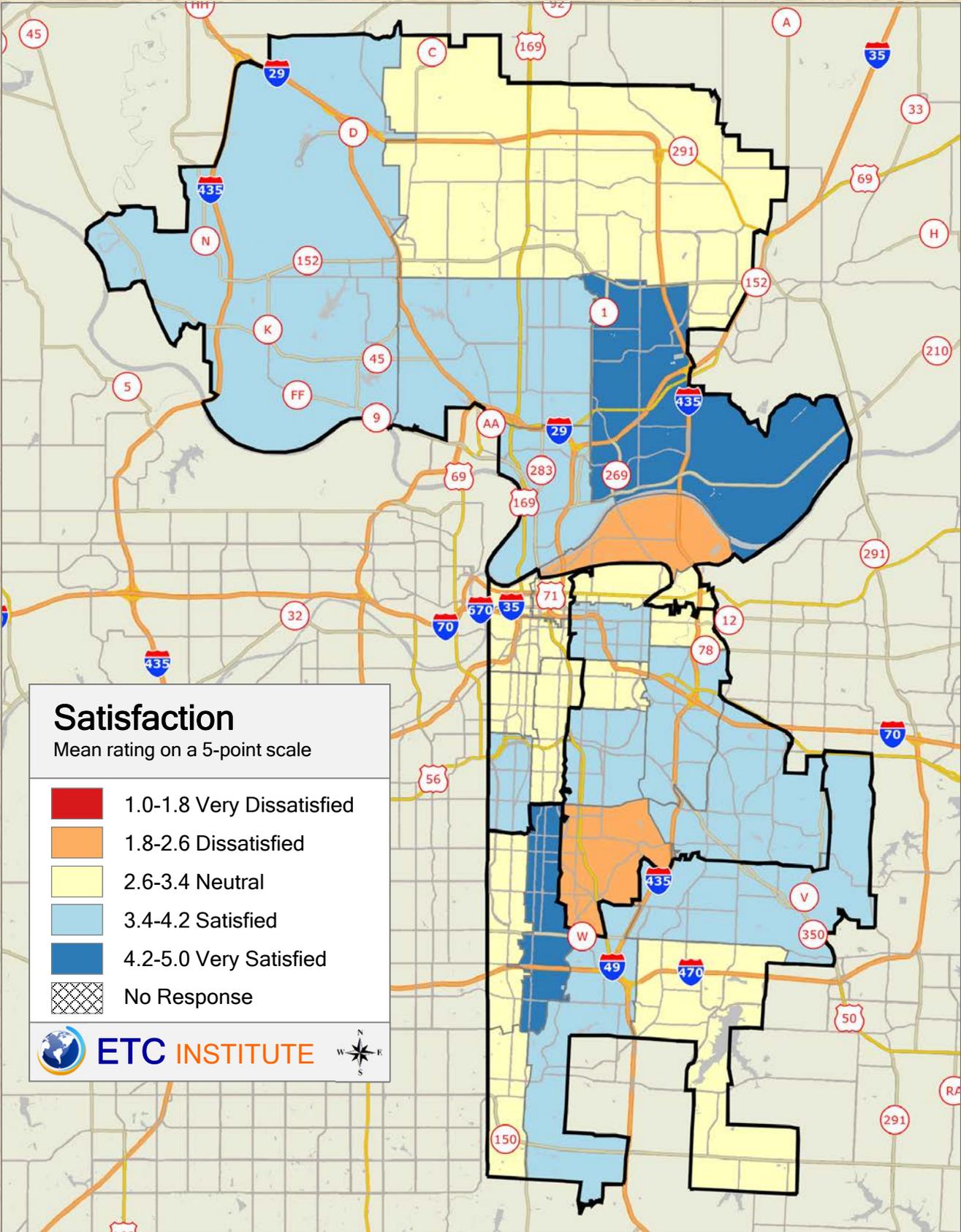
Q4b.16 Satisfaction with: Water services



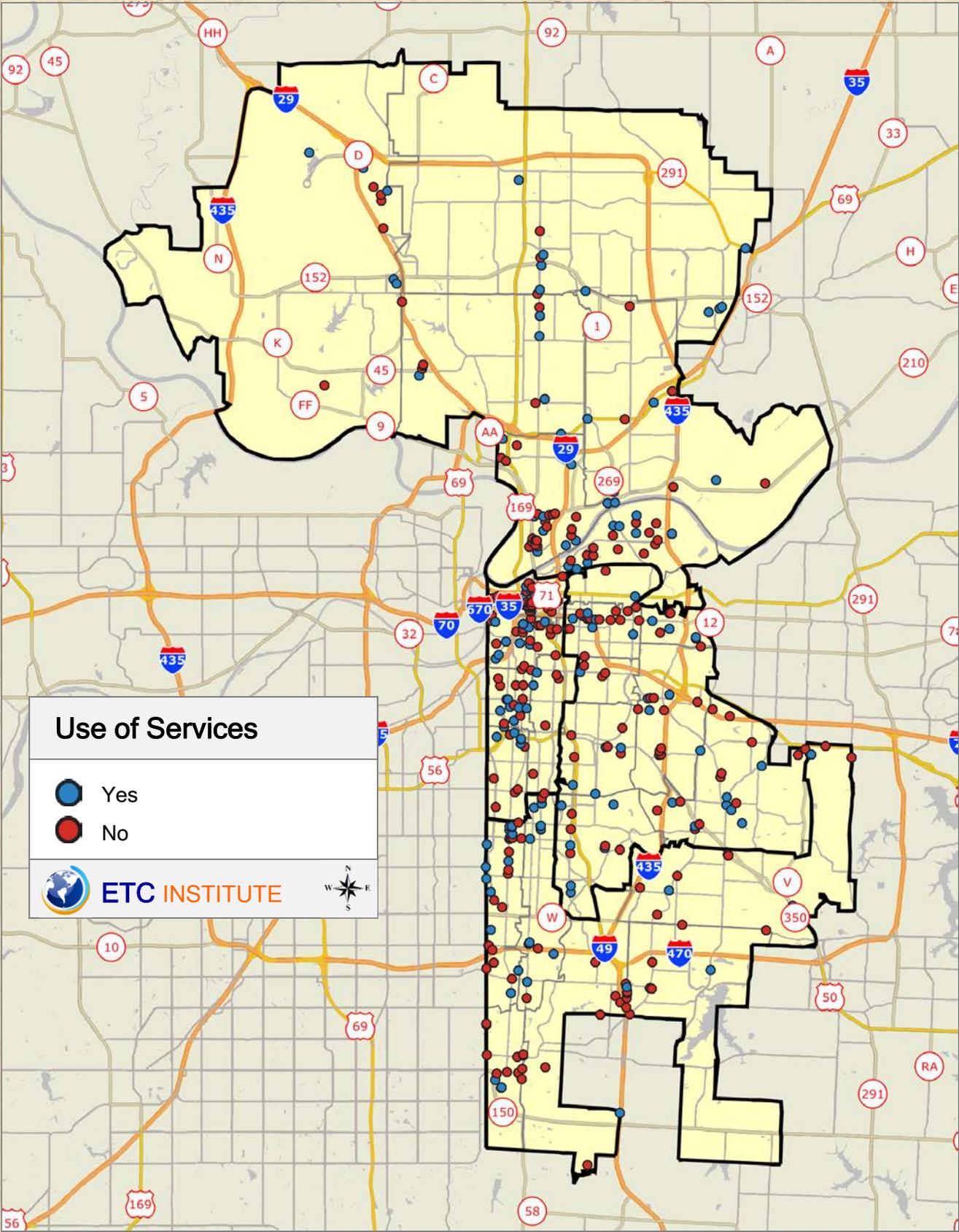
2018 Kansas City, Missouri Employer Survey

Shading reflects the mean rating for all respondents by ZIP Code (merged as needed)

Q4b.17 Satisfaction with: Stormwater drainage



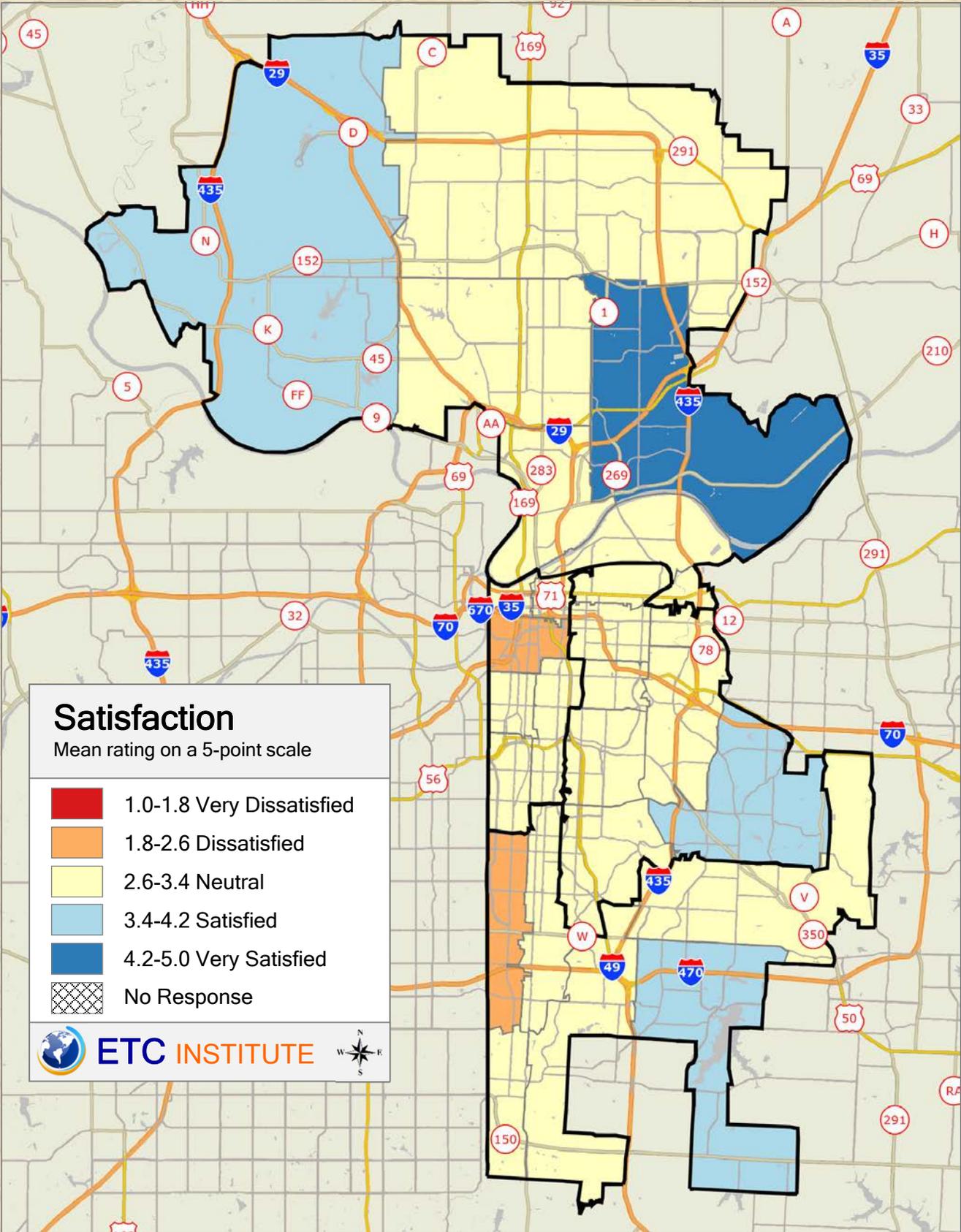
Q4a.18 Have you used: Street maintenance



2018 Kansas City, Missouri Employer Survey

Shading reflects the mean rating for all respondents by ZIP Code (merged as needed)

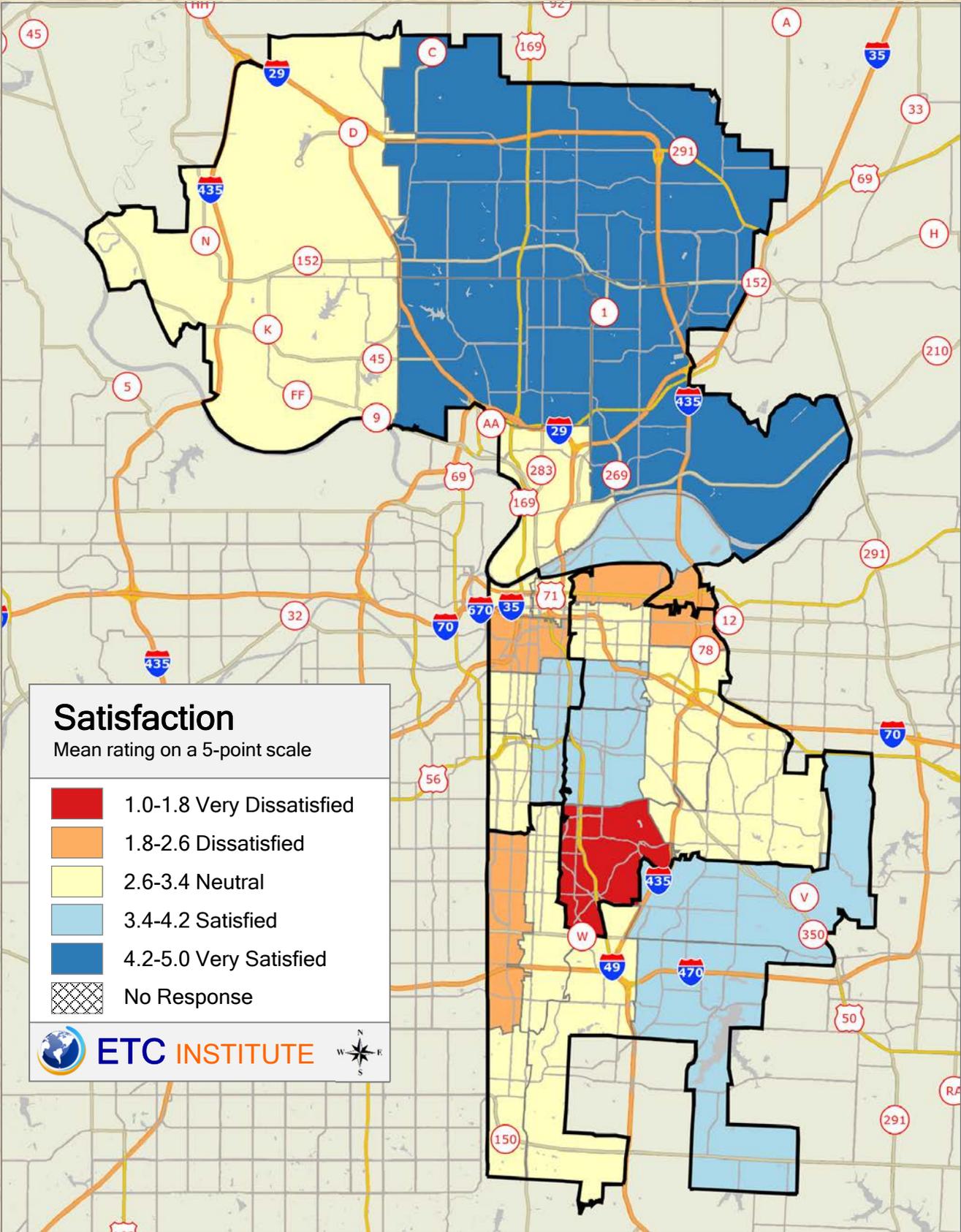
Q4b.18 Satisfaction with: Street maintenance



2018 Kansas City, Missouri Employer Survey

Shading reflects the mean rating for all respondents by ZIP Code (merged as needed)

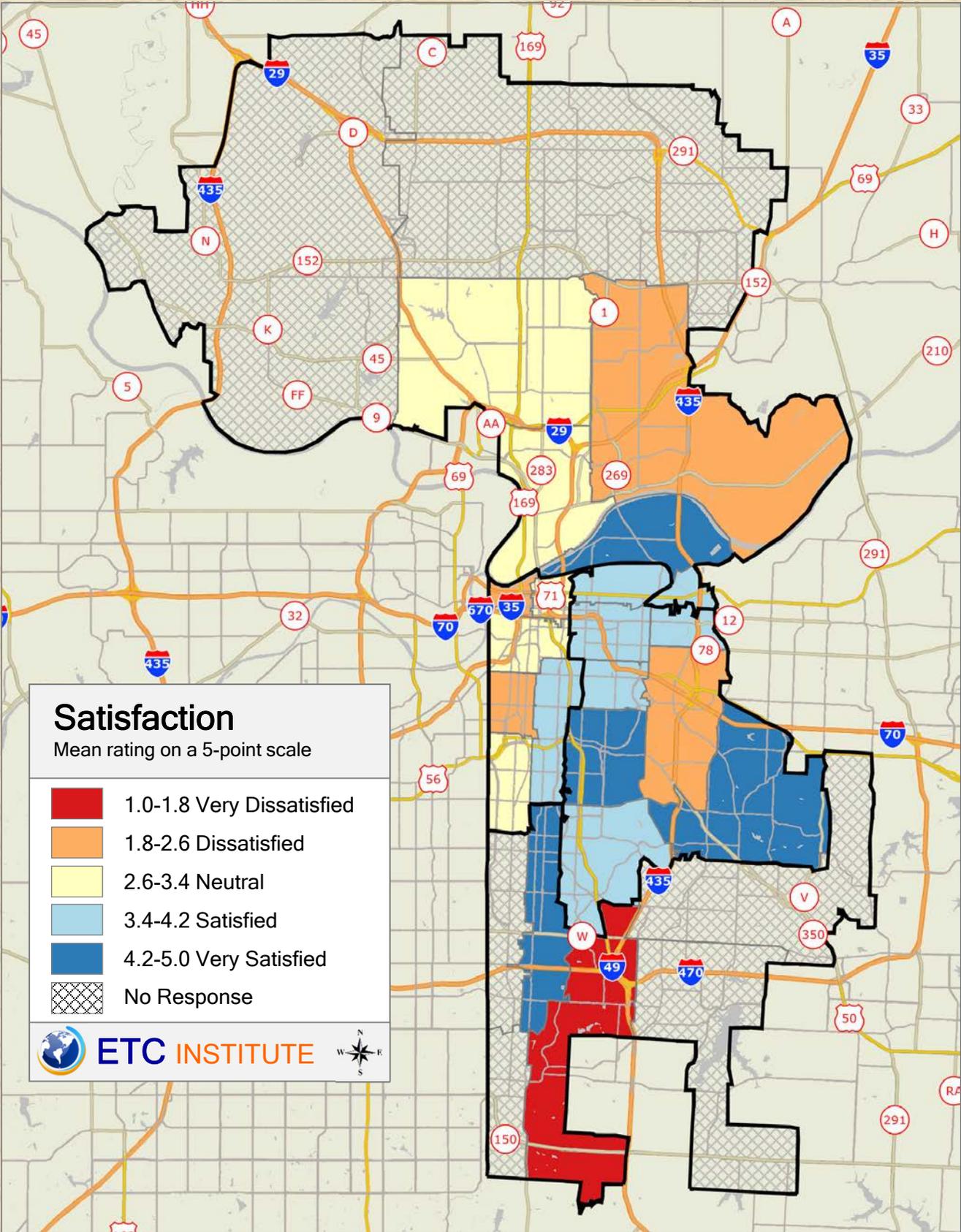
Q4b.19 Satisfaction with: Sidewalk maintenance



2018 Kansas City, Missouri Employer Survey

Shading reflects the mean rating for all respondents by ZIP Code (merged as needed)

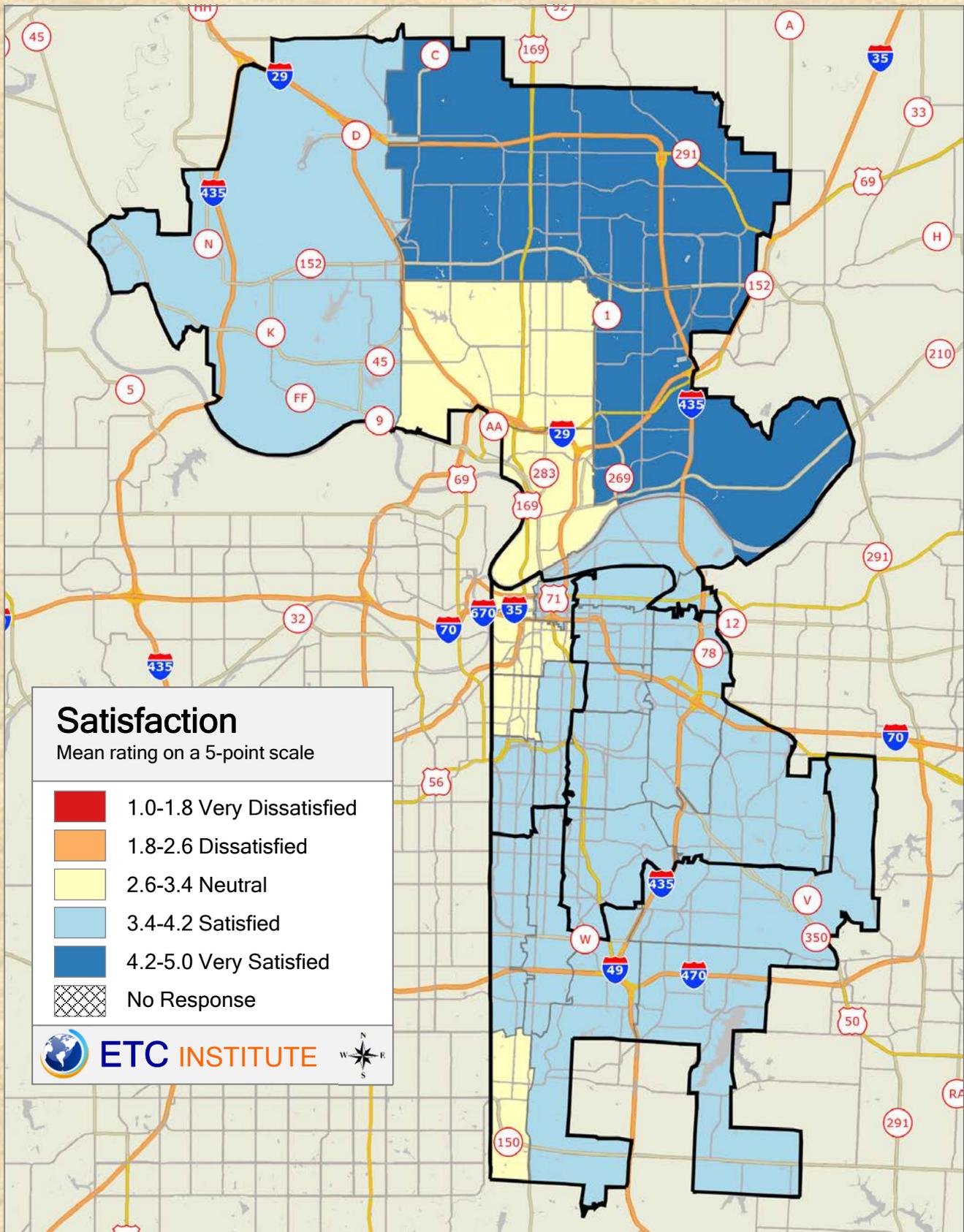
Q4b.20 Satisfaction with: MBE/WBE certification



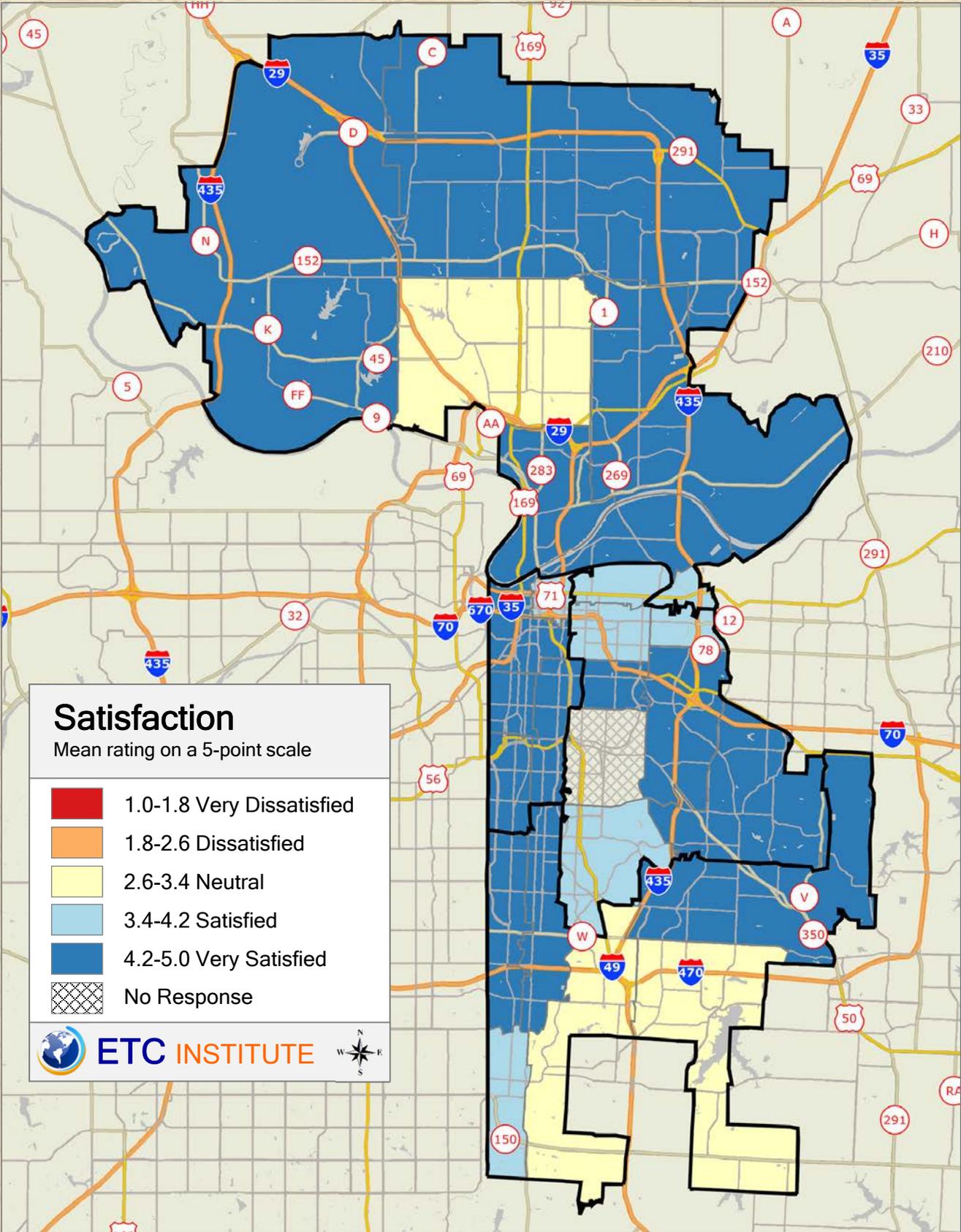
2018 Kansas City, Missouri Employer Survey

Shading reflects the mean rating for all respondents by ZIP Code (merged as needed)

Q4b.21 Satisfaction with: Website usefulness (kcmo.gov)



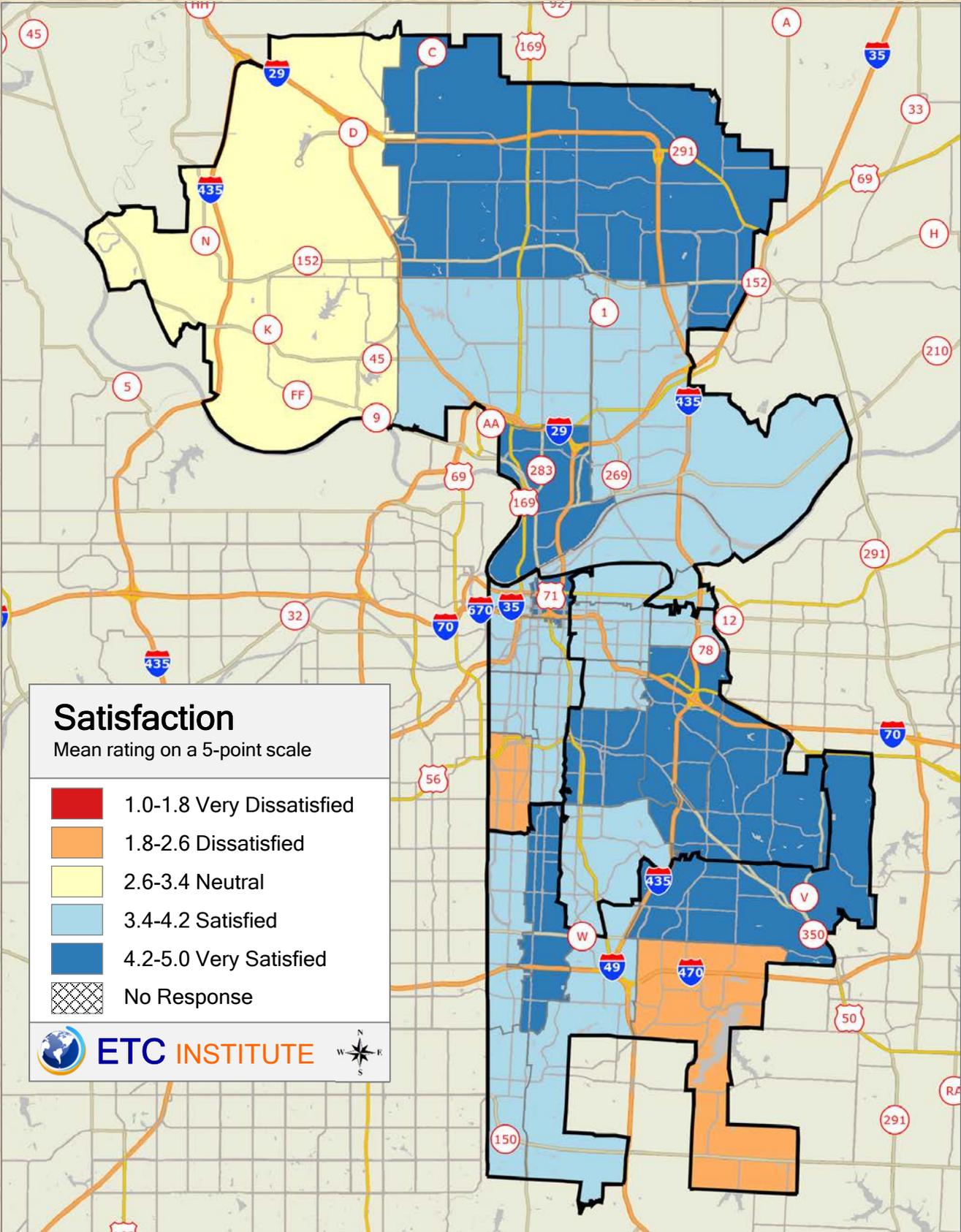
Q4b.22 Satisfaction with: KC Streetcar



2018 Kansas City, Missouri Employer Survey

Shading reflects the mean rating for all respondents by ZIP Code (merged as needed)

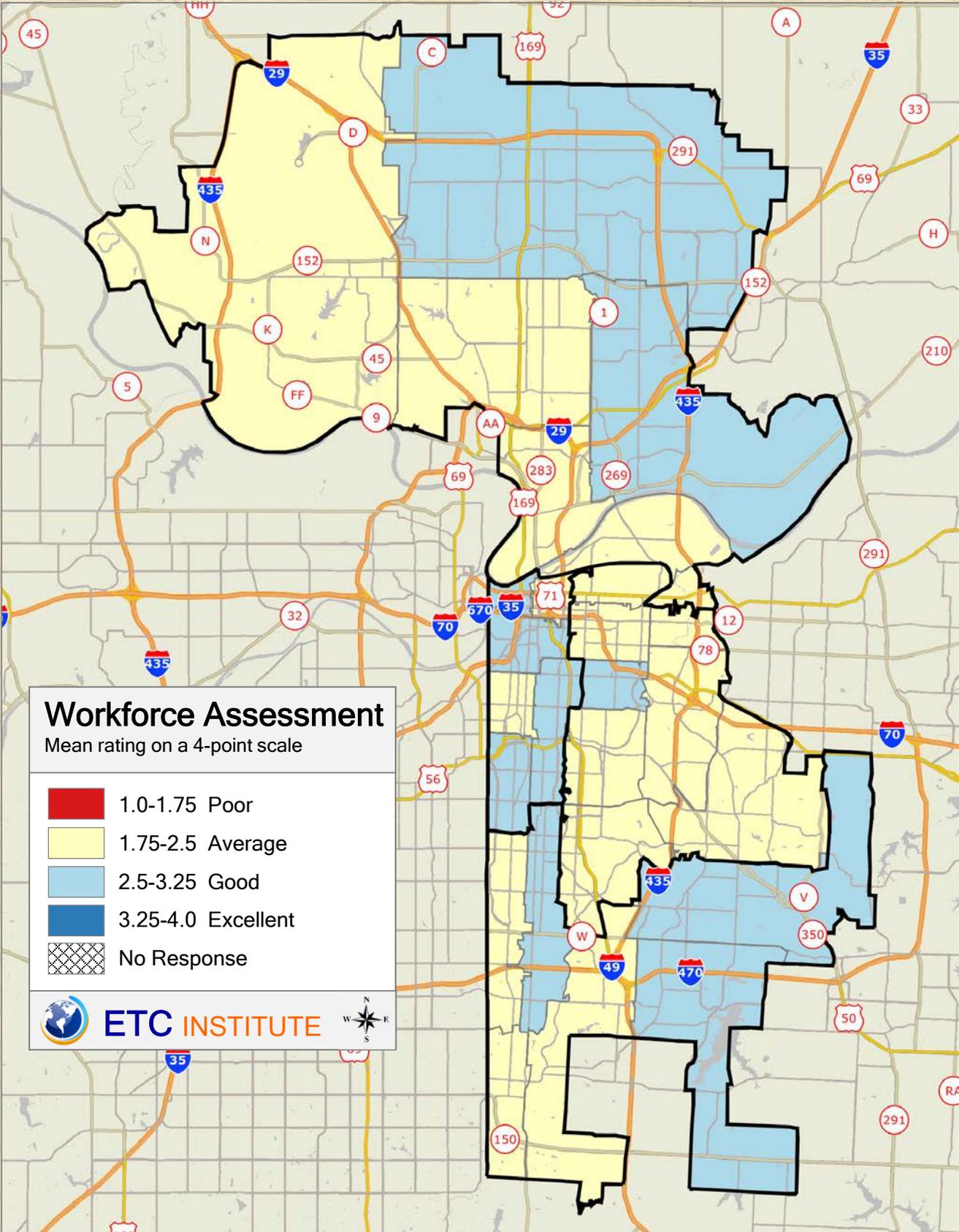
Q4b.23 Satisfaction with: KCATA bus service



2018 Kansas City, Missouri Employer Survey

Shading reflects the mean rating for all respondents by ZIP Code (merged as needed)

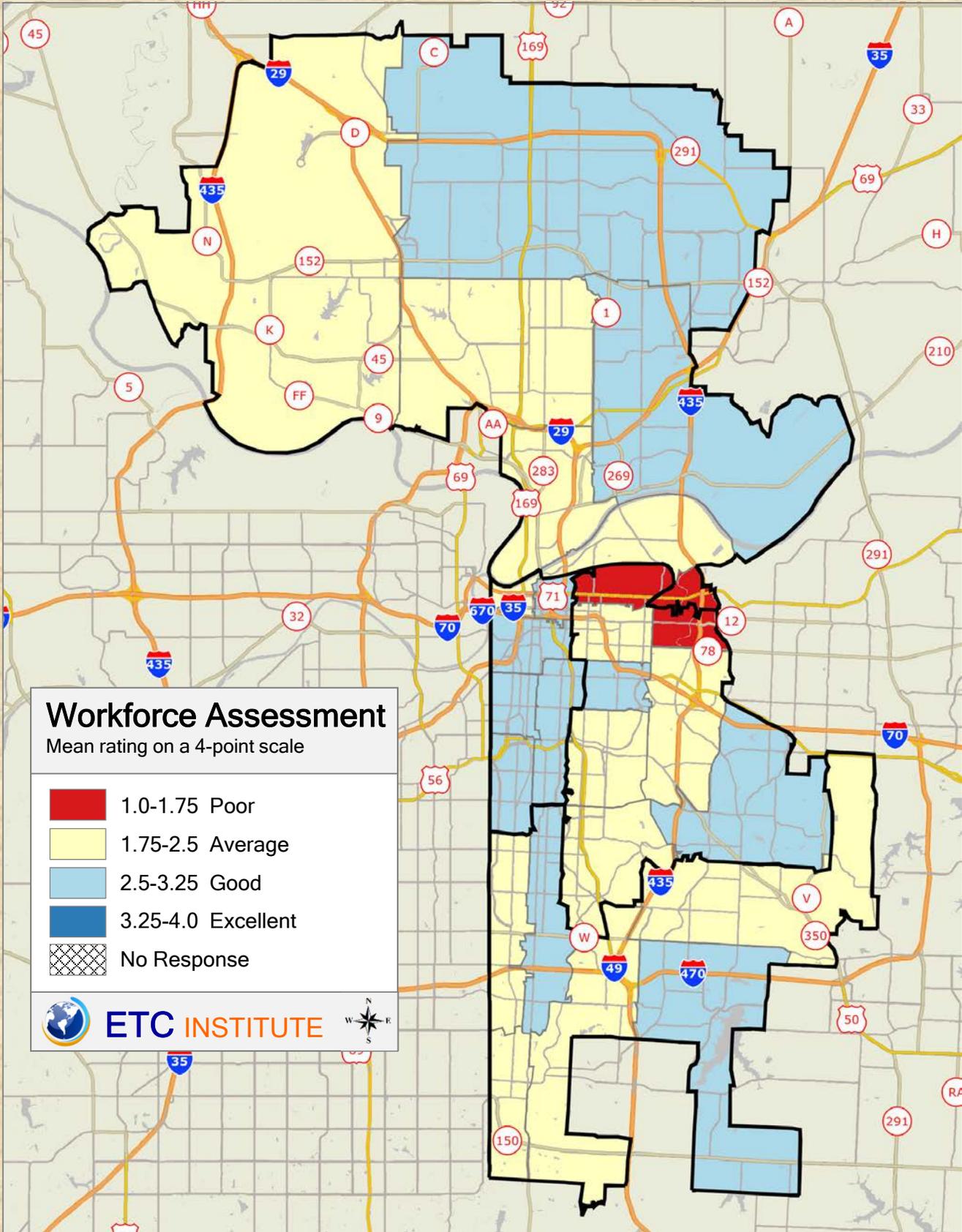
Q6.1 Rating the quality of: The availability of workers



2018 Kansas City, Missouri Employer Survey

Shading reflects the mean rating for all respondents by ZIP Code (merged as needed)

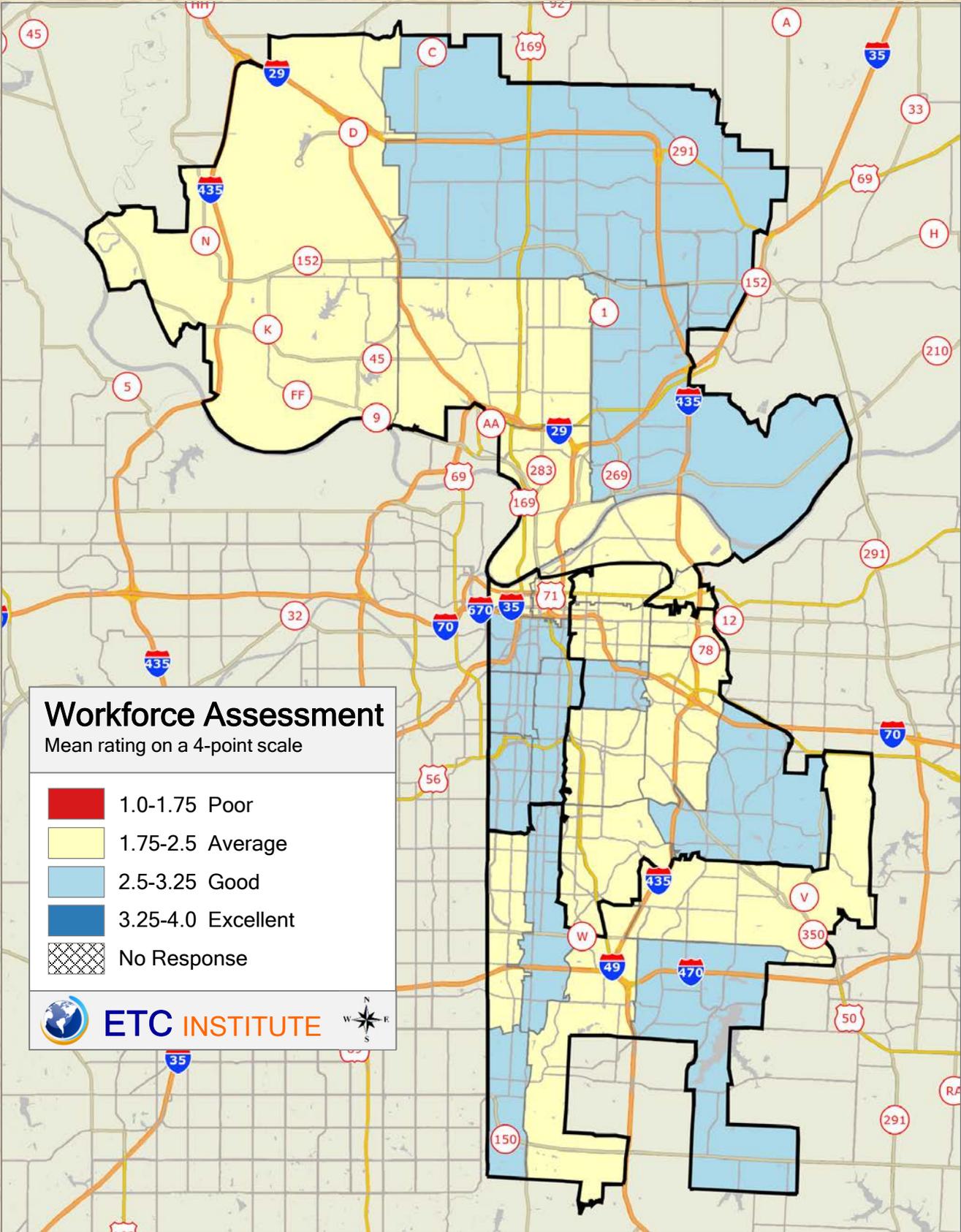
Q6.2 Rating the quality of: The quality of workers



2018 Kansas City, Missouri Employer Survey

Shading reflects the mean rating for all respondents by ZIP Code (merged as needed)

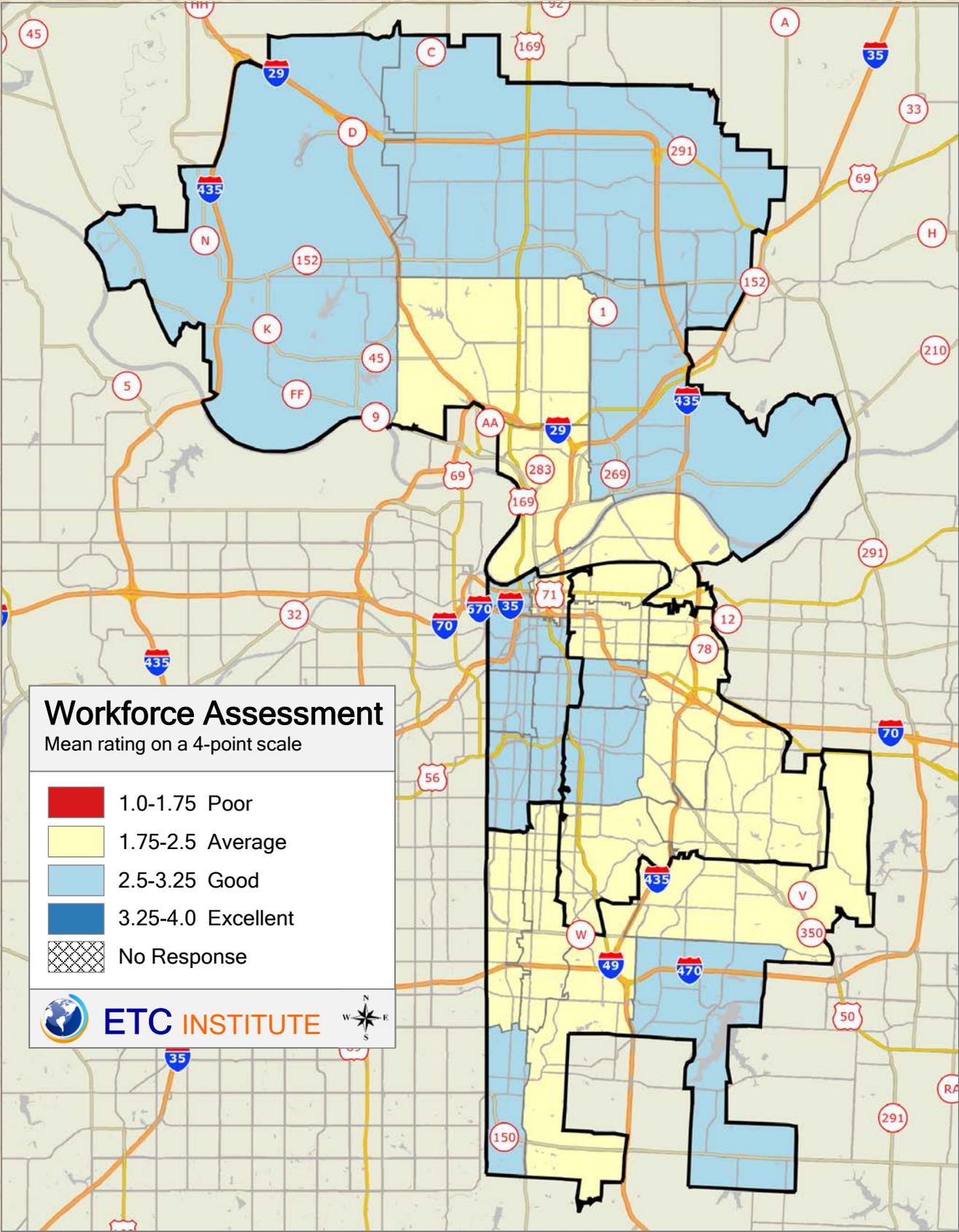
Q6.3 Rating the quality of: The stability of workers



2018 Kansas City, Missouri Employer Survey

Shading reflects the mean rating for all respondents by ZIP Code (merged as needed)

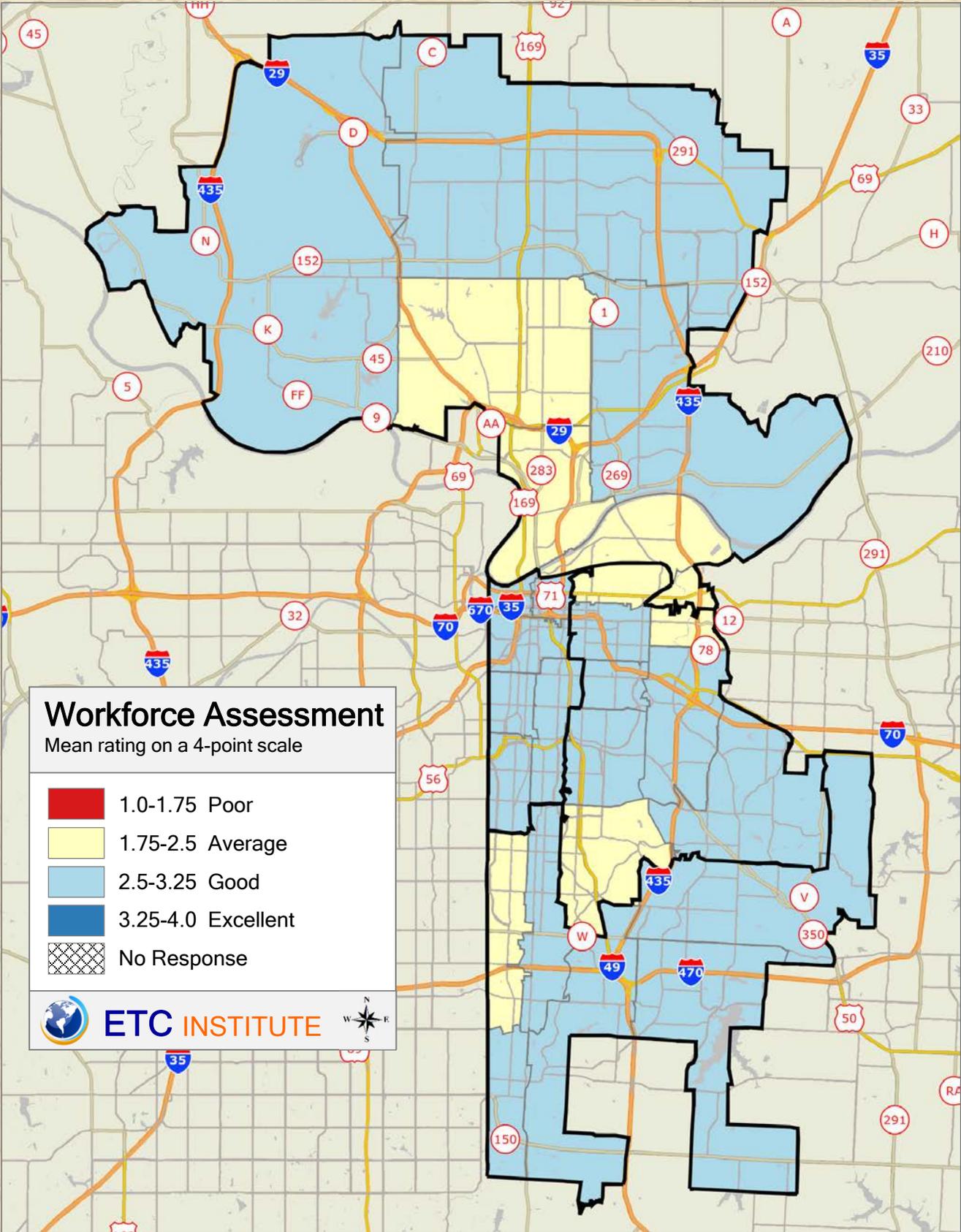
Q6.4 Rating the quality of: The education/technical skills of workers



2018 Kansas City, Missouri Employer Survey

Shading reflects the mean rating for all respondents by ZIP Code (merged as needed)

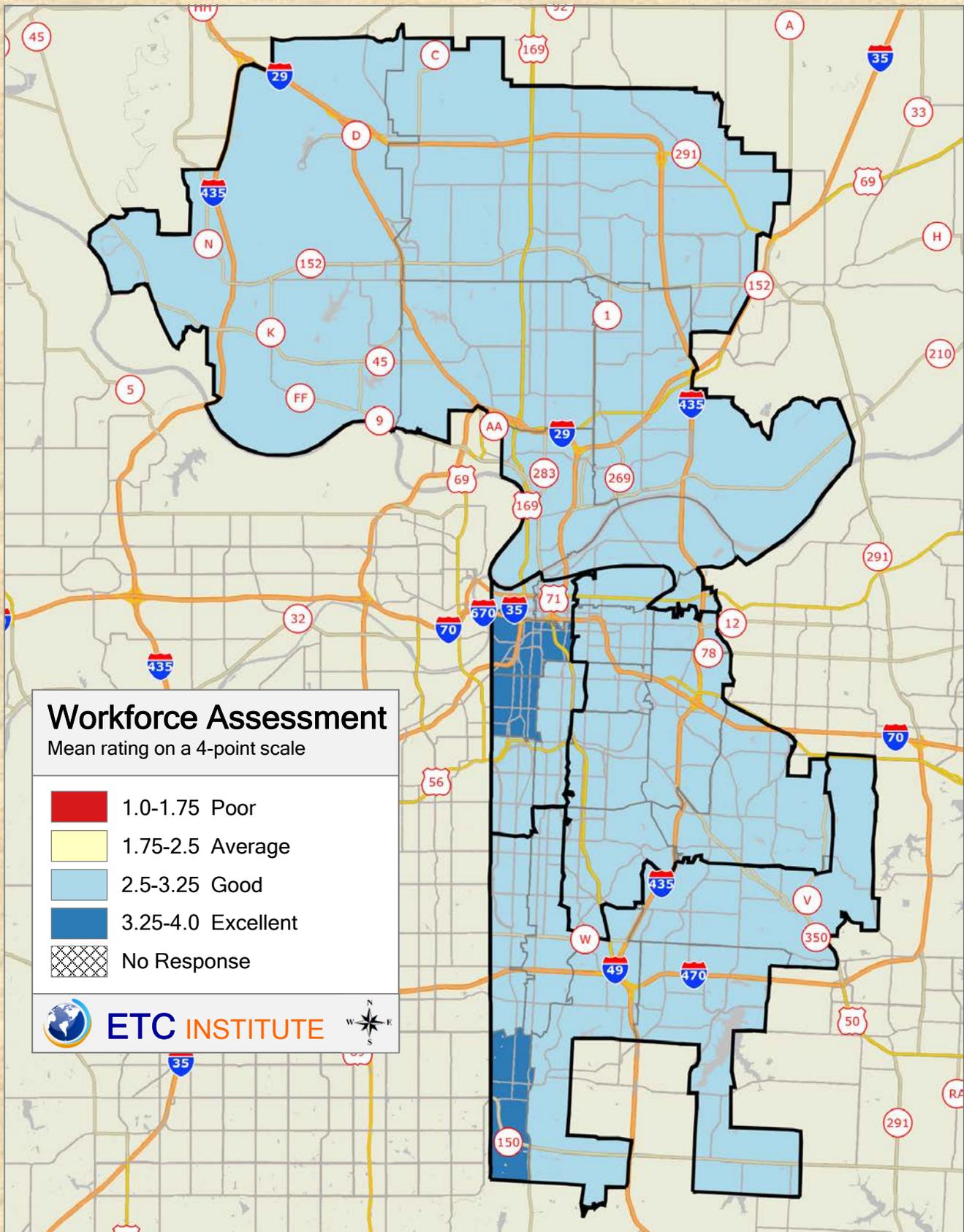
Q6.5 Rating the quality of: The productivity of workers



2018 Kansas City, Missouri Employer Survey

Shading reflects the mean rating for all respondents by ZIP Code (merged as needed)

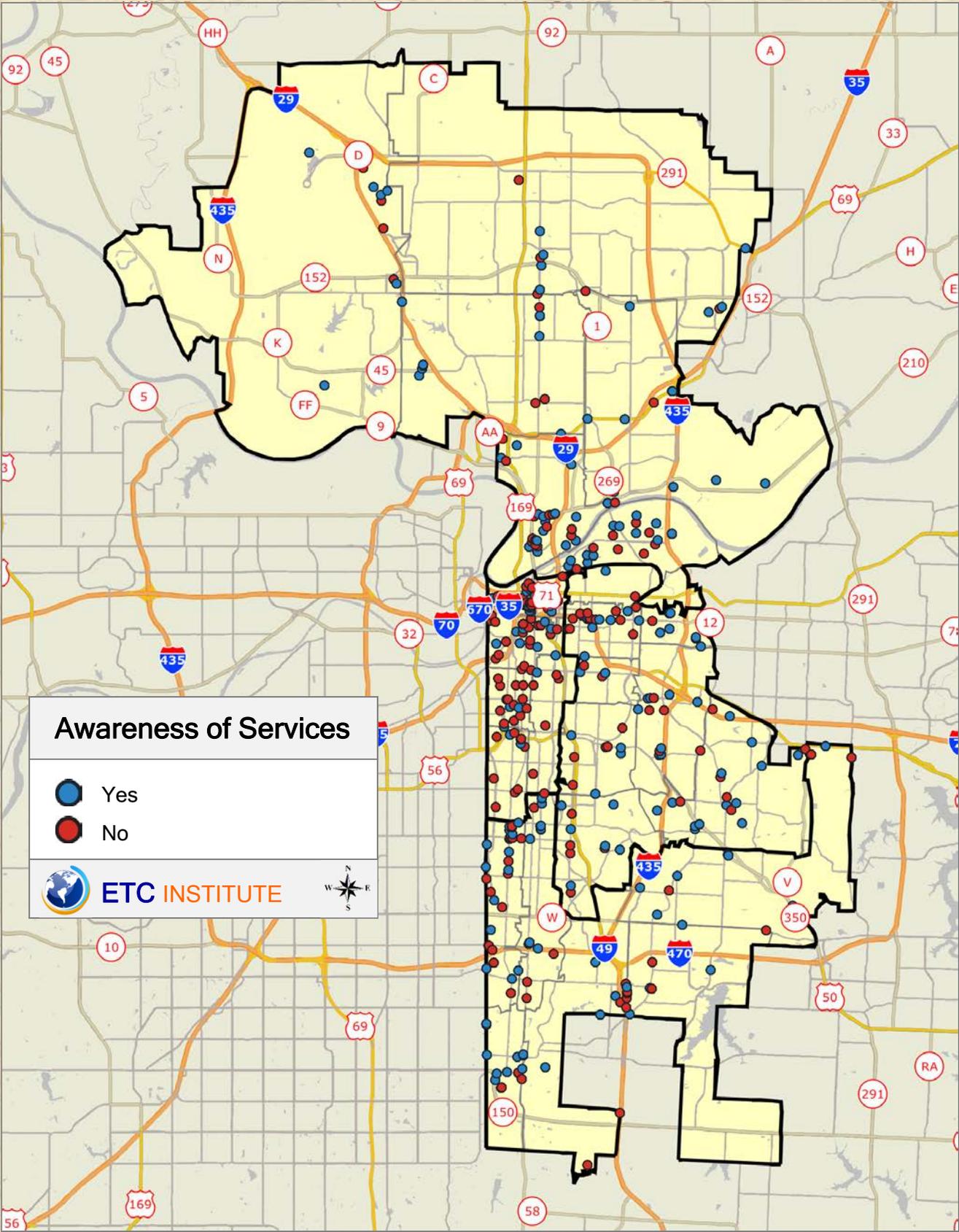
Q6.6 Rating the quality of: Kansas City as a place to work



2018 Kansas City, Missouri Employer Survey

Shading reflects the mean rating for all respondents by ZIP Code (merged as needed)

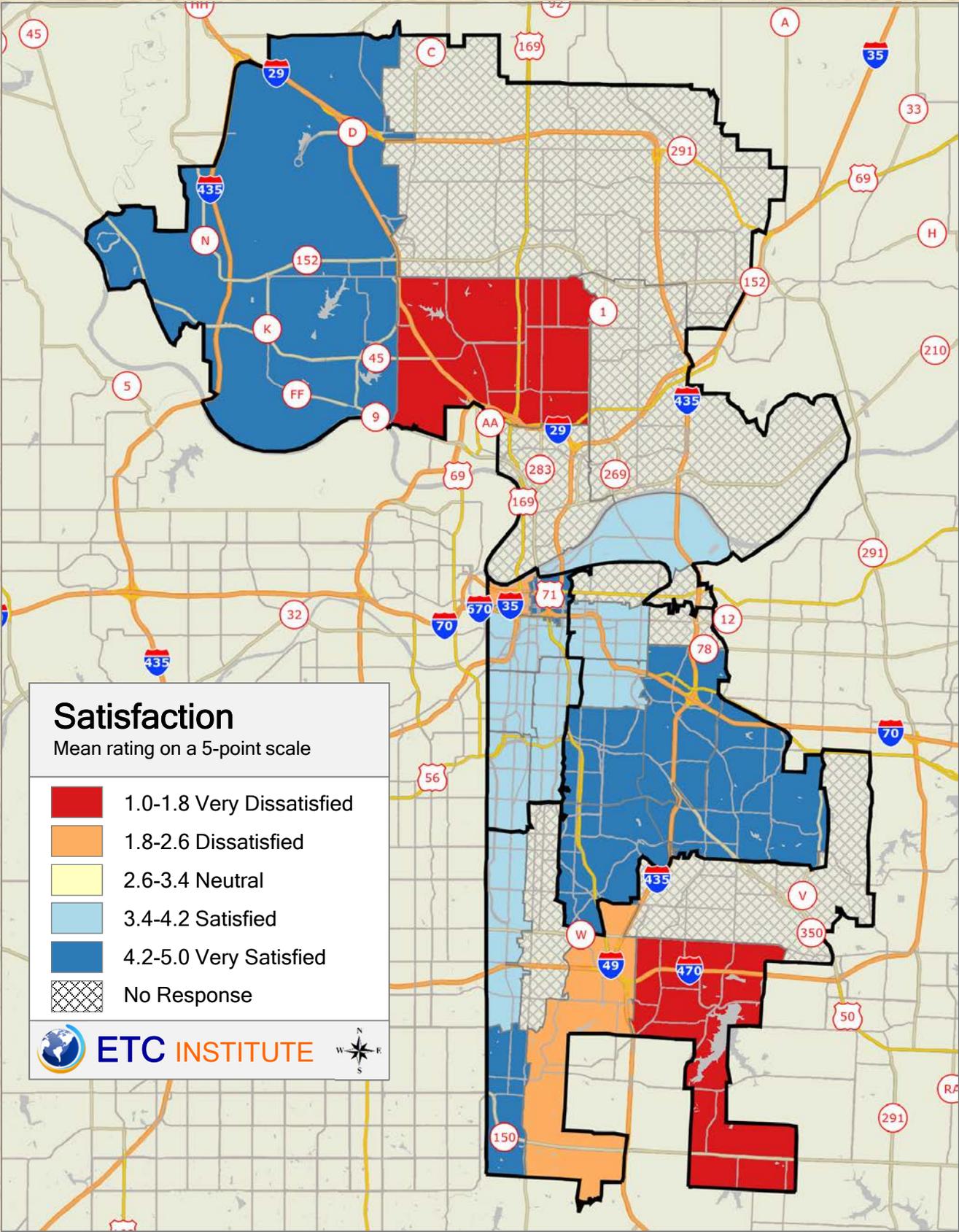
Q18a.1 Are you aware of: Economic Development Corporation of KCMO



2018 Kansas City, Missouri Employer Survey

Shading reflects the mean rating for all respondents by ZIP Code (merged as needed)

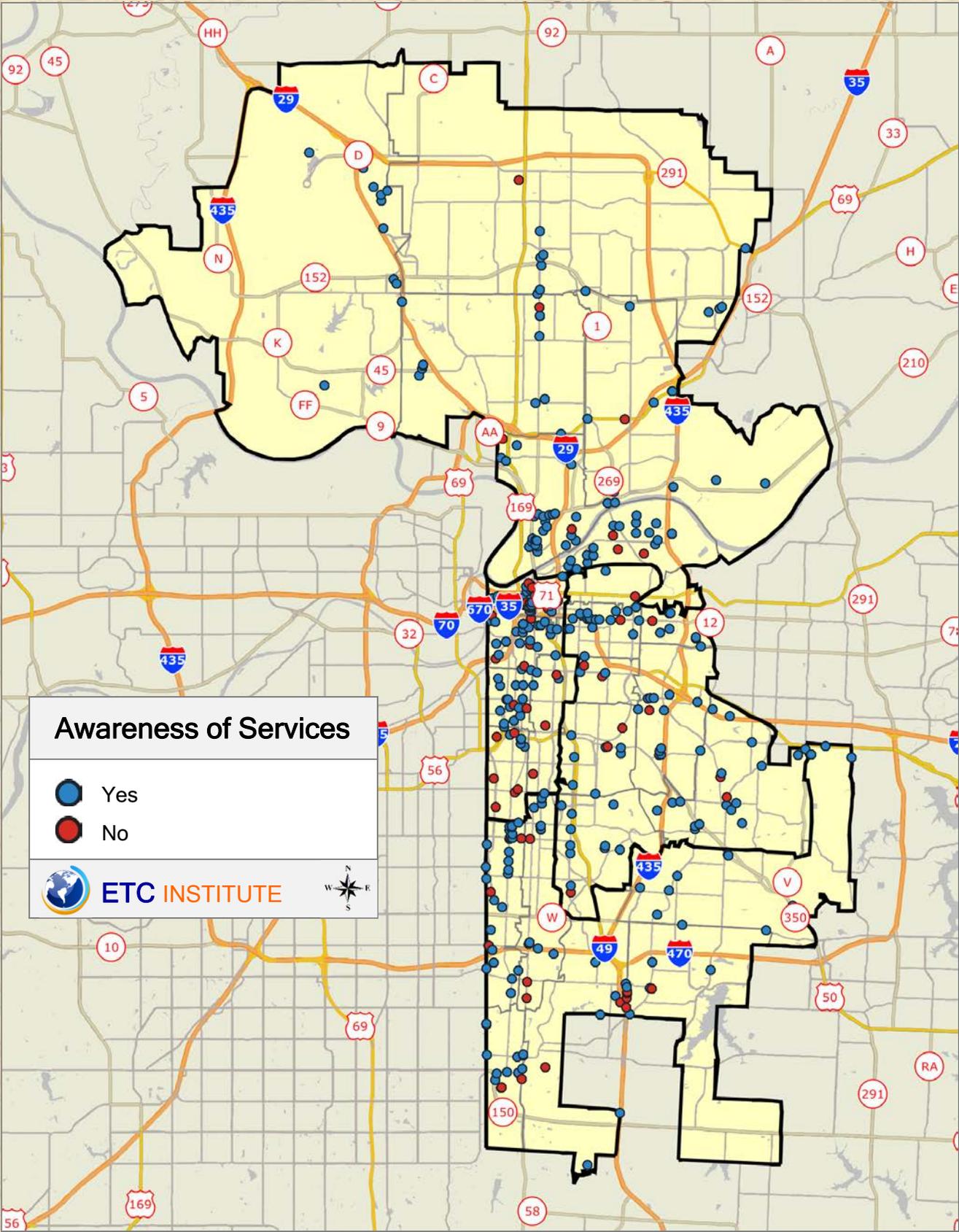
Q18c.1 Satisfaction with: Economic Development Corporation of KCMO



2018 Kansas City, Missouri Employer Survey

Shading reflects the mean rating for all respondents by ZIP Code (merged as needed)

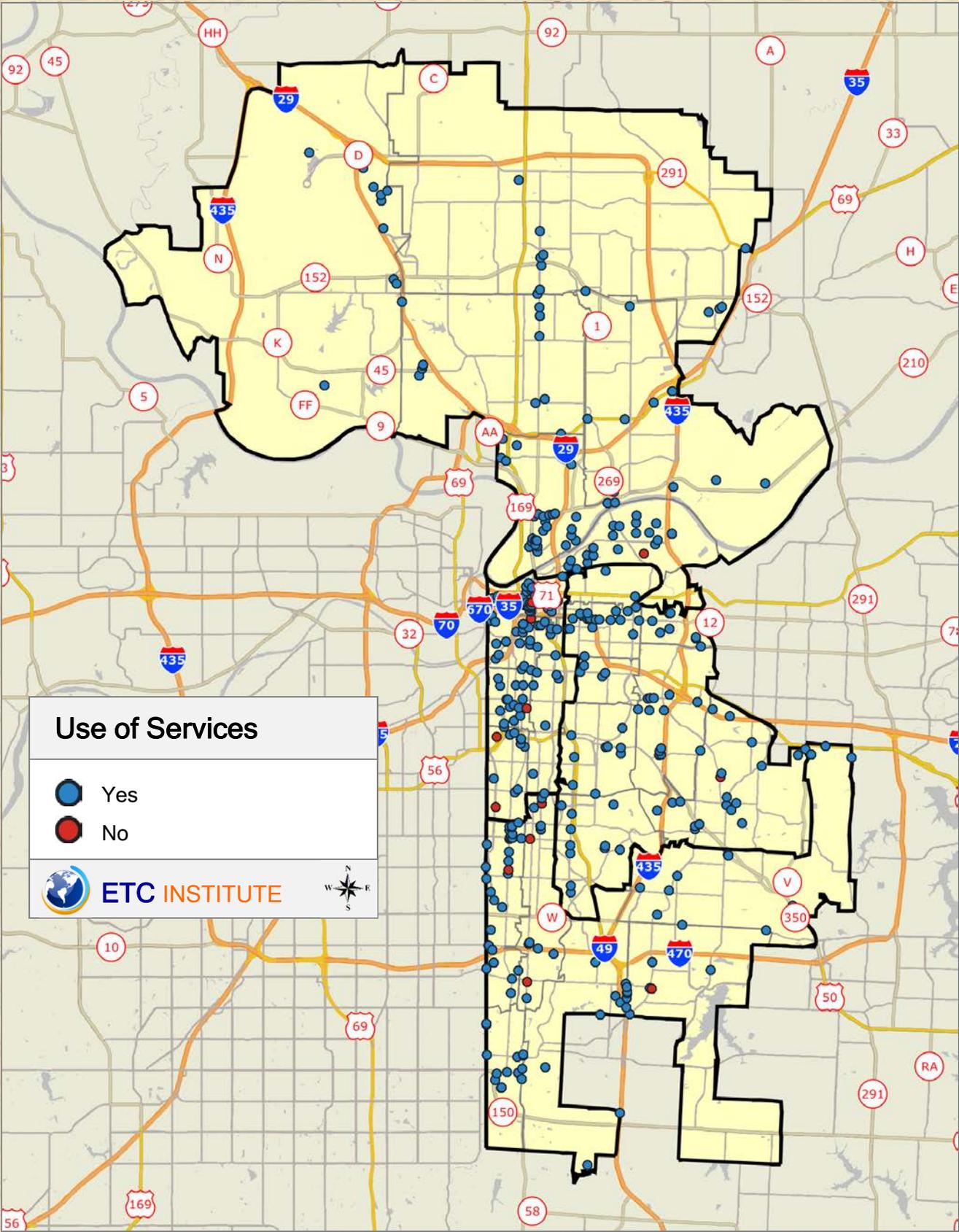
Q18a.2 Are you aware of: KC Bizcare



2018 Kansas City, Missouri Employer Survey

Shading reflects the mean rating for all respondents by ZIP Code (merged as needed)

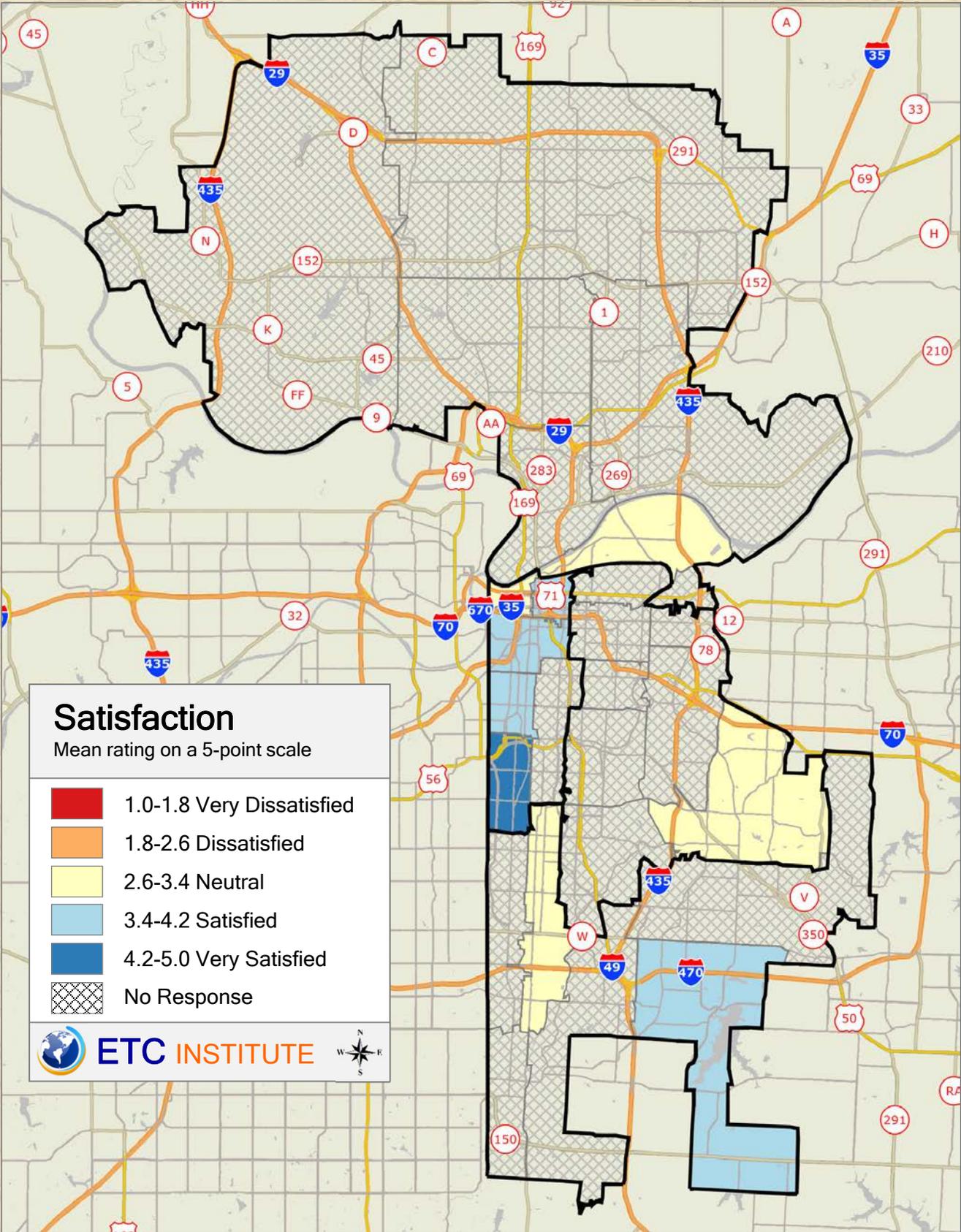
Q18b.2 Have you used: KC Bizcare



2018 Kansas City, Missouri Employer Survey

Shading reflects the mean rating for all respondents by ZIP Code (merged as needed)

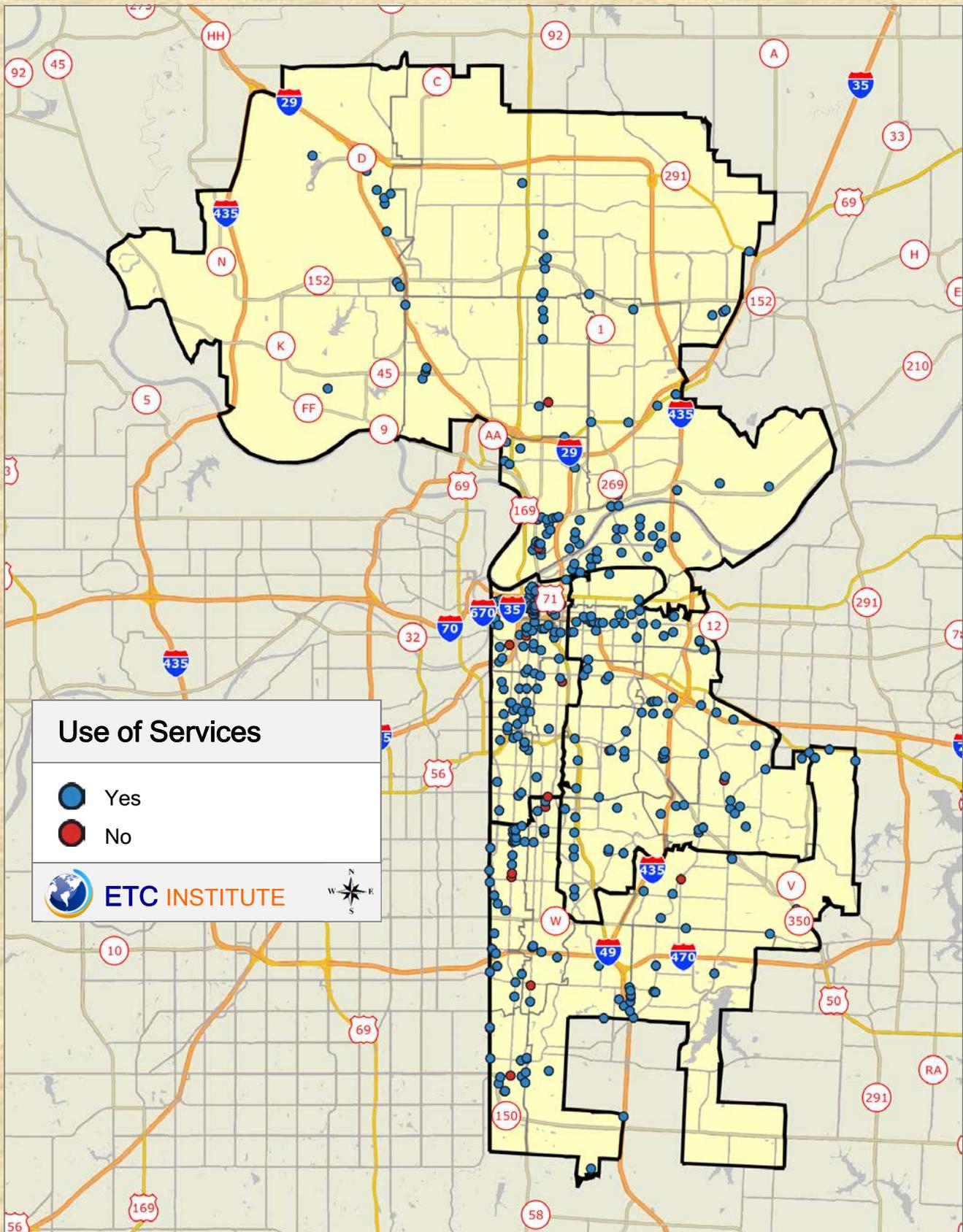
Q18c.2 Satisfaction with: KC Bizcare



2018 Kansas City, Missouri Employer Survey

Shading reflects the mean rating for all respondents by ZIP Code (merged as needed)

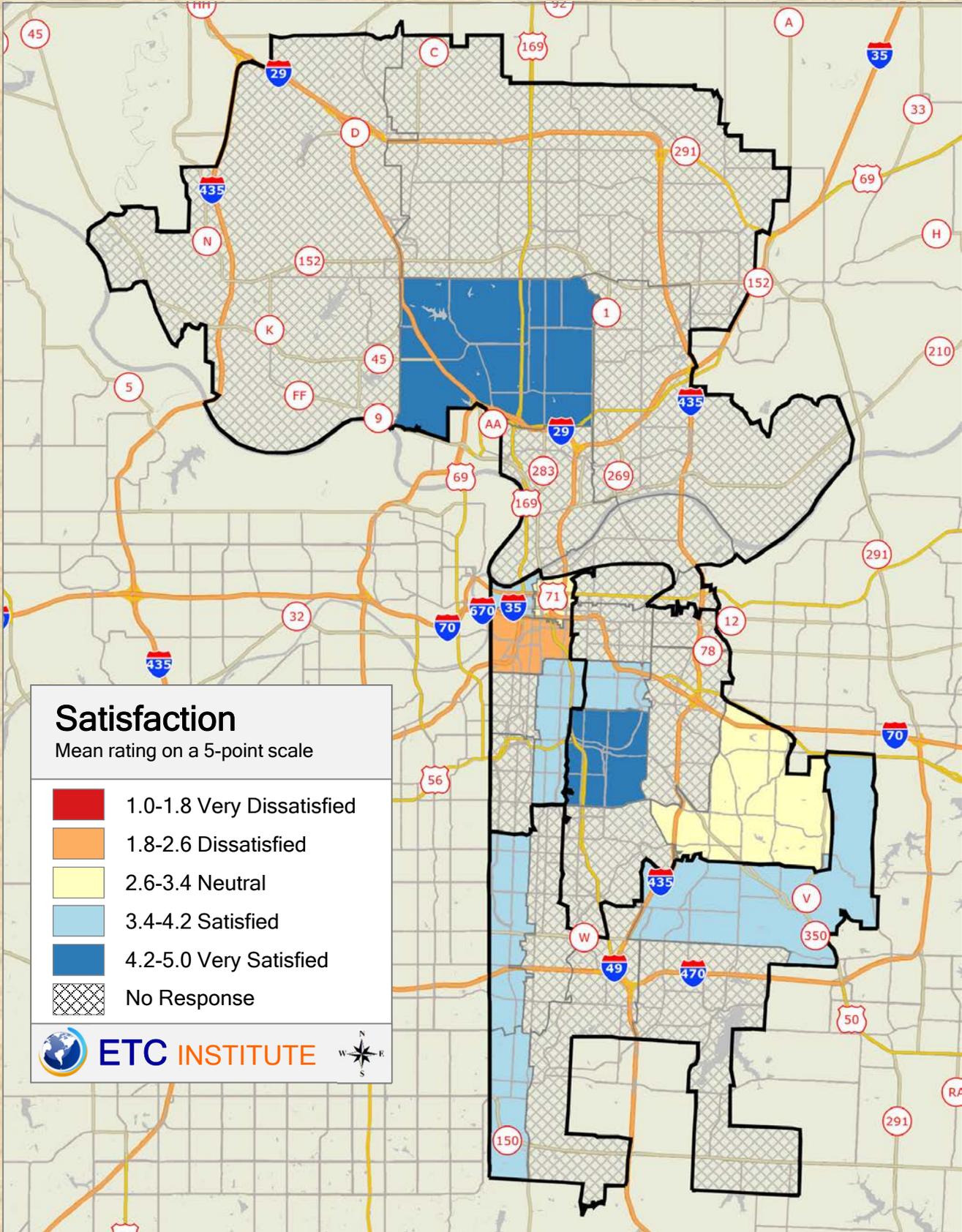
Q18b.3 Have you used: KCSourceLink



2018 Kansas City, Missouri Employer Survey

Shading reflects the mean rating for all respondents by ZIP Code (merged as needed)

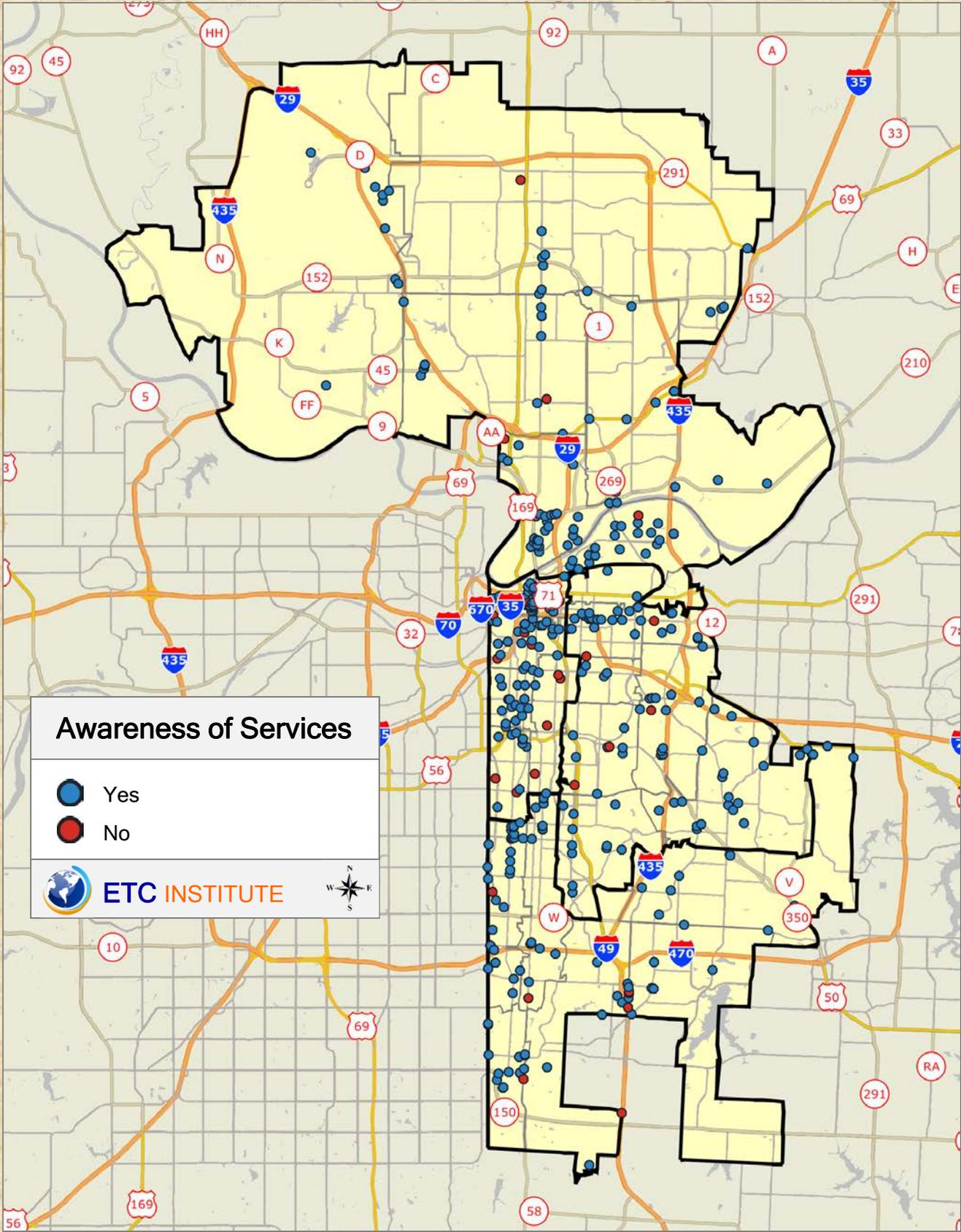
Q18c.3 Satisfaction with: KCSourceLink



2018 Kansas City, Missouri Employer Survey

Shading reflects the mean rating for all respondents by ZIP Code (merged as needed)

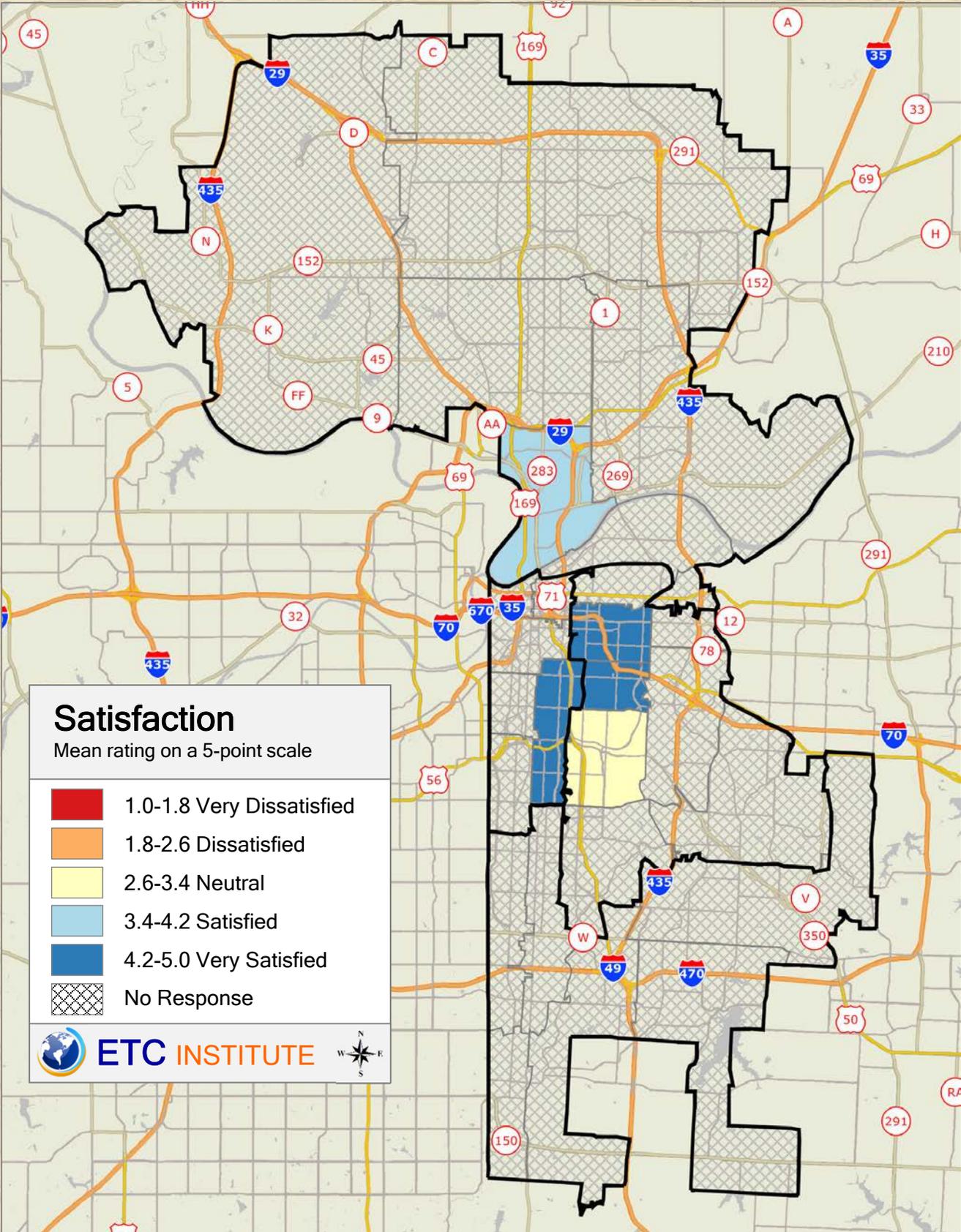
Q18a.4 Are you aware of: Justine Petersen Small Business Loans



2018 Kansas City, Missouri Employer Survey

Shading reflects the mean rating for all respondents by ZIP Code (merged as needed)

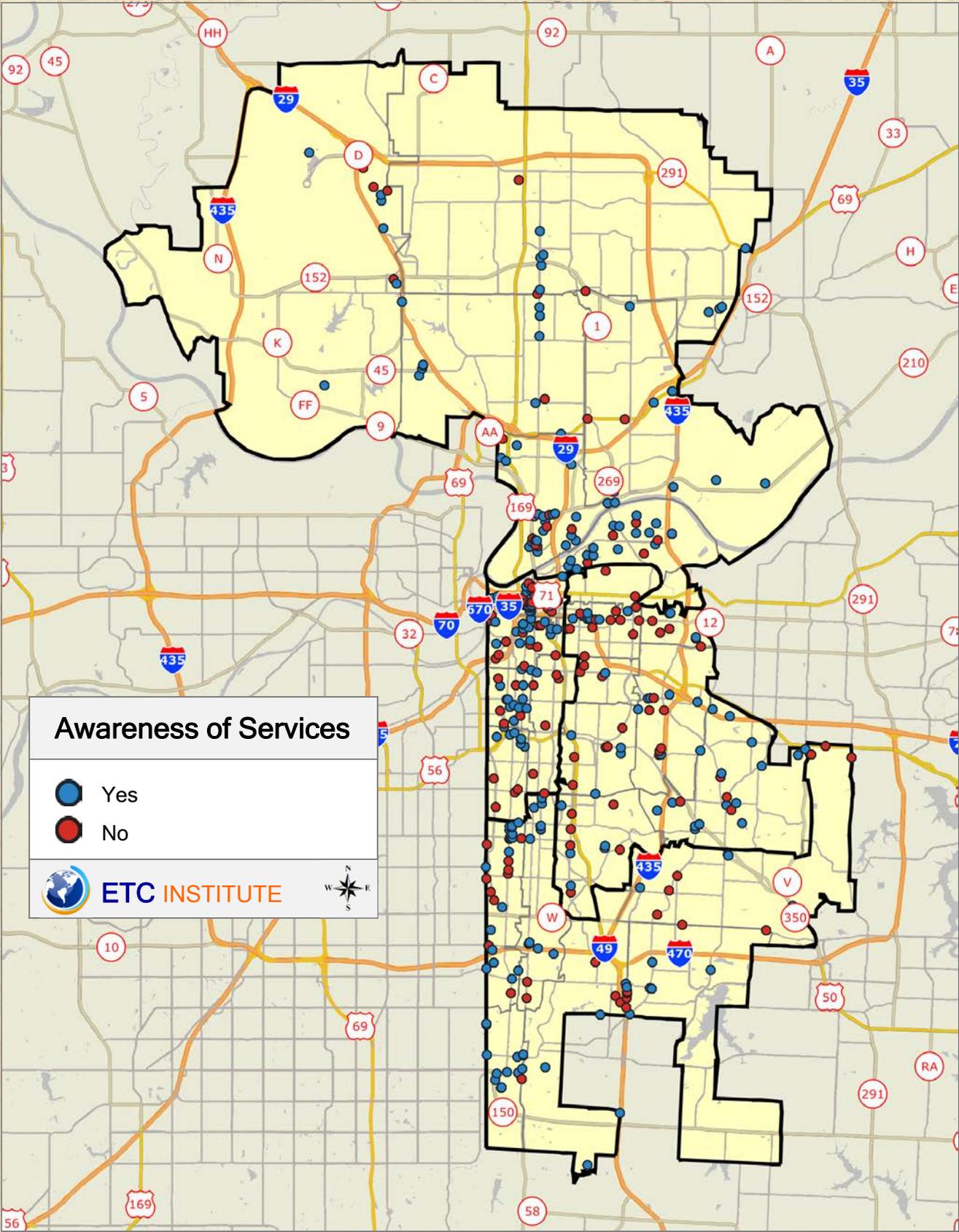
Q18c.4 Satisfaction with: Justine Petersen Small Business Loans



2018 Kansas City, Missouri Employer Survey

Shading reflects the mean rating for all respondents by ZIP Code (merged as needed)

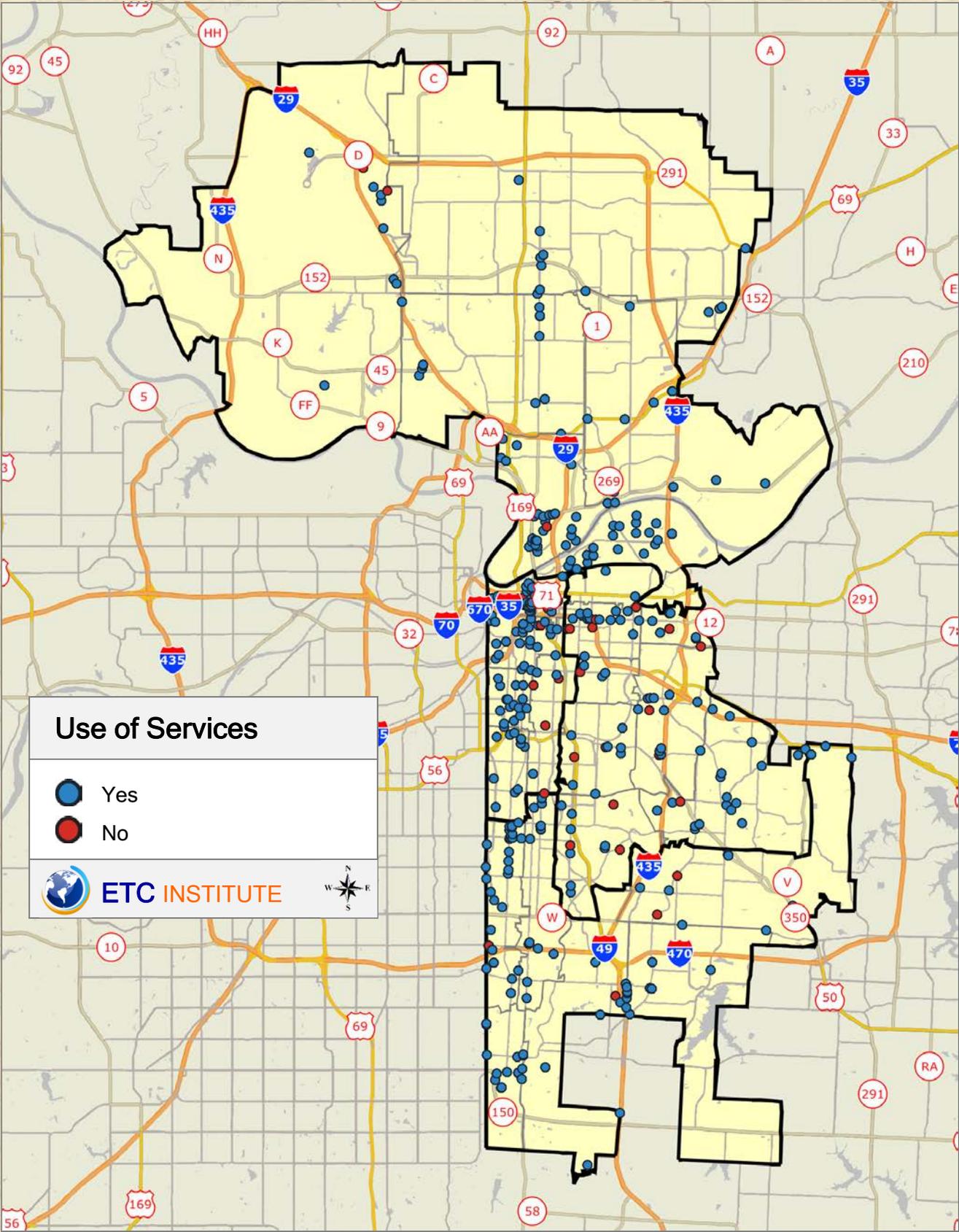
Q18a.5 Are you aware of: Full Employment Council



2018 Kansas City, Missouri Employer Survey

Shading reflects the mean rating for all respondents by ZIP Code (merged as needed)

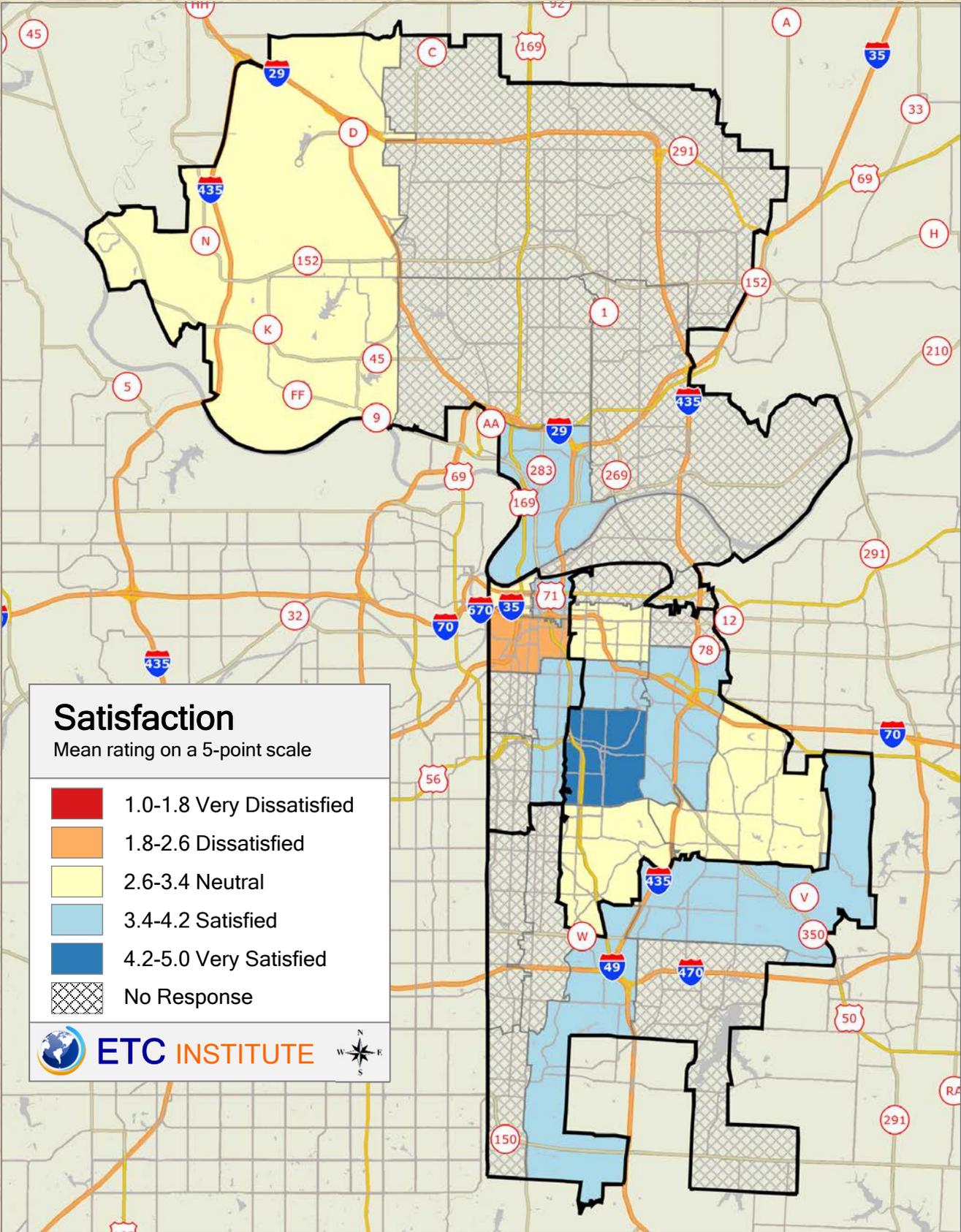
Q18b.5 Have you used: Full Employment Council



2018 Kansas City, Missouri Employer Survey

Shading reflects the mean rating for all respondents by ZIP Code (merged as needed)

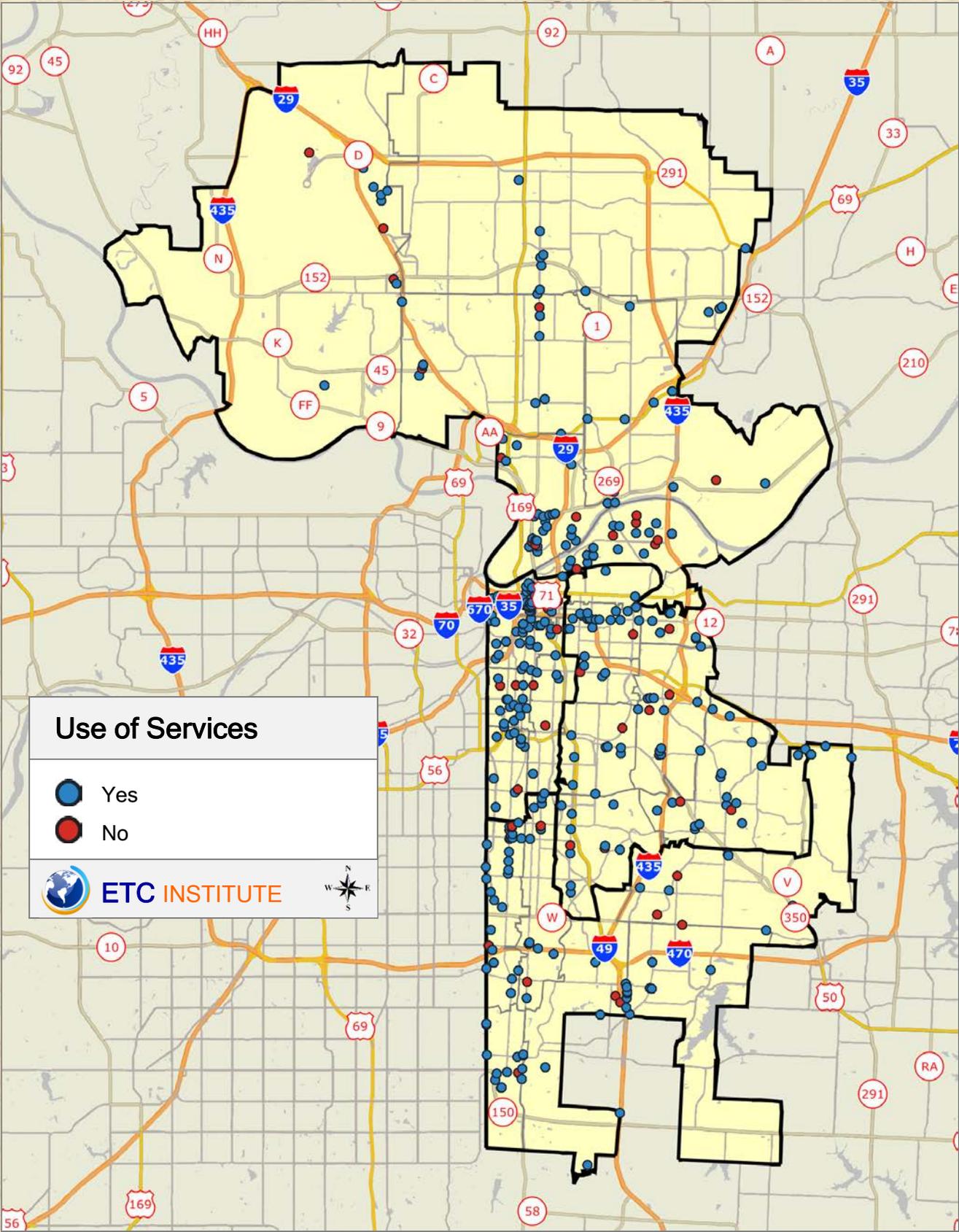
Q18c.5 Satisfaction with: Full Employment Council



2018 Kansas City, Missouri Employer Survey

Shading reflects the mean rating for all respondents by ZIP Code (merged as needed)

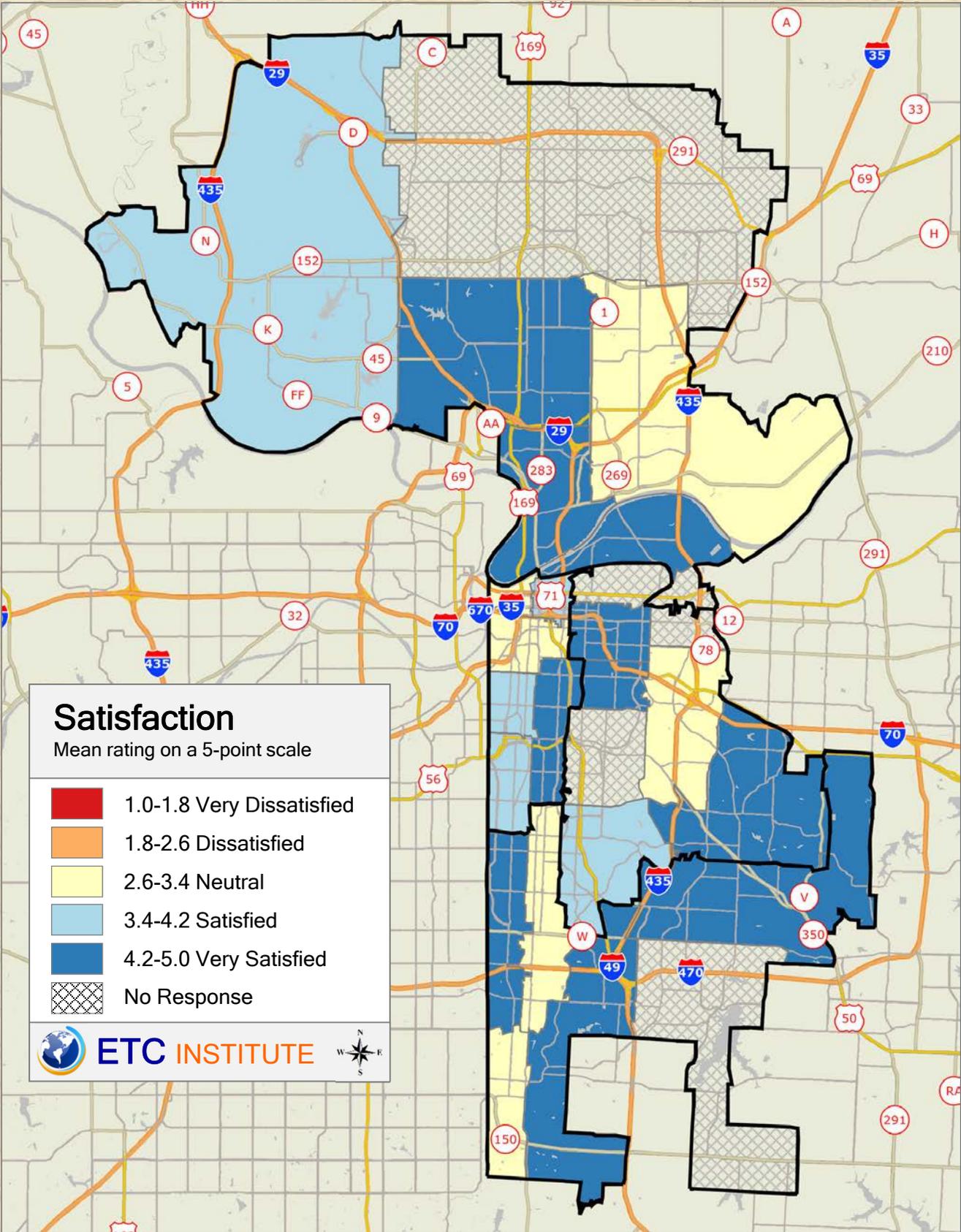
Q18b.6 Have you used: Metropolitan Community College



2018 Kansas City, Missouri Employer Survey

Shading reflects the mean rating for all respondents by ZIP Code (merged as needed)

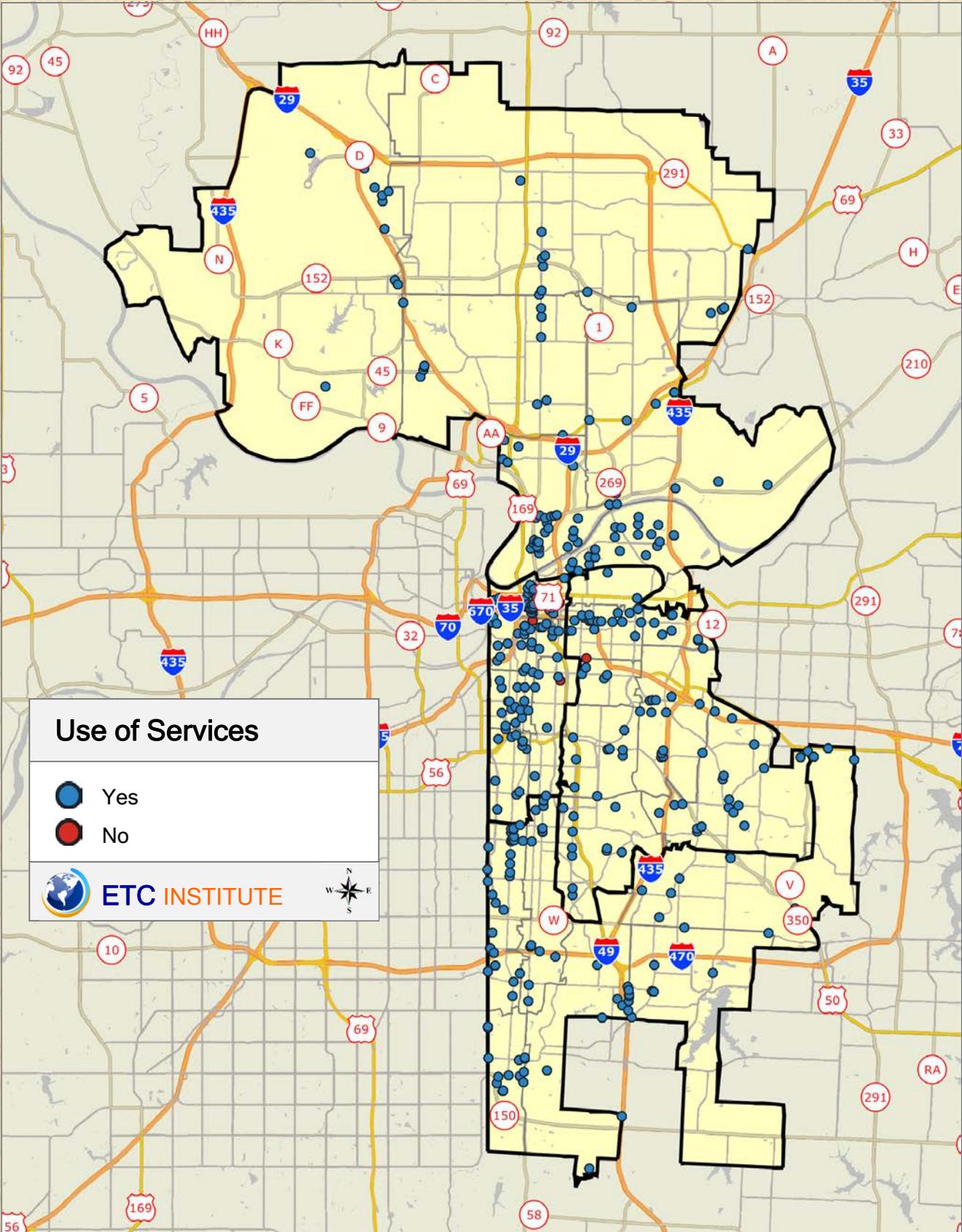
Q18c.6 Satisfaction with: Metropolitan Community College



2018 Kansas City, Missouri Employer Survey

Shading reflects the mean rating for all respondents by ZIP Code (merged as needed)

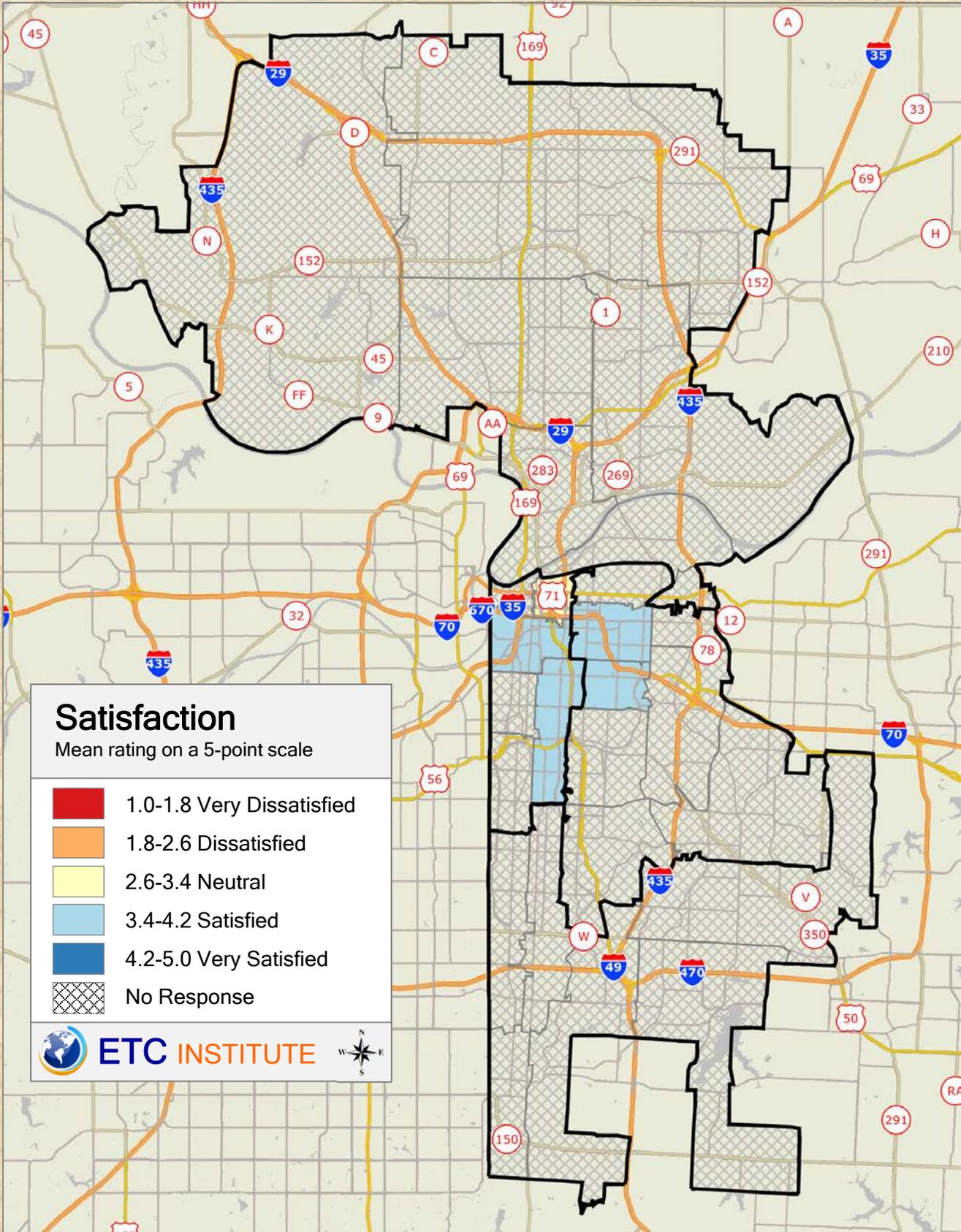
Q18b.7 Have you used: Altcap



2018 Kansas City, Missouri Employer Survey

Shading reflects the mean rating for all respondents by ZIP Code (merged as needed)

Q18c.7 Satisfaction with: Altcap



2018 Kansas City, Missouri Employer Survey

Shading reflects the mean rating for all respondents by ZIP Code (merged as needed)

Section 4

Tabular Data

Q1. How would you rate Kansas City, Missouri overall as a place to do business?

Q1. How would you rate Kansas City, Missouri overall as a place to do business	Number	Percent
Excellent	92	22.3 %
Good	177	42.9 %
Average	99	24.0 %
Below average	22	5.3 %
Poor	6	1.5 %
Don't know	17	4.1 %
Total	413	100.0 %

WITHOUT "DON'T KNOW"**Q1. How would you rate Kansas City, Missouri overall as a place to do business? (without "don't know")**

Q1. How would you rate Kansas City, Missouri overall as a place to do business	Number	Percent
Excellent	92	23.2 %
Good	177	44.7 %
Average	99	25.0 %
Below average	22	5.6 %
Poor	6	1.5 %
Total	396	100.0 %

Q2. Several items that may influence your perception of the City of Kansas City, Missouri are listed below. Please rate each item on a scale of 1 to 5, where 5 means "Very Satisfied" and 1 means "Very Dissatisfied."

(N=413)

	Very satisfied	Satisfied	Neutral	Dissatisfied	Very dissatisfied	Don't know
Q2-1. Overall quality of services provided by City	8.7%	47.9%	30.3%	8.0%	1.2%	3.9%
Q2-2. Overall image of City	16.9%	54.0%	23.0%	3.6%	1.5%	1.0%
Q2-3. Overall quality of life in City	21.5%	46.5%	24.2%	4.6%	0.2%	2.9%
Q2-4. Quality of new development in City	18.2%	46.0%	25.4%	3.9%	1.7%	4.8%
Q2-5. Overall quality of education system within City	3.6%	11.4%	30.3%	21.5%	16.7%	16.5%
Q2-6. Overall feeling of safety in City	4.1%	26.4%	40.0%	19.9%	8.2%	1.5%
Q2-7. Overall value that you receive for your City tax & fees	4.1%	28.6%	37.3%	13.1%	7.7%	9.2%

WITHOUT "DON'T KNOW"

Q2. Several items that may influence your perception of the City of Kansas City, Missouri are listed below. Please rate each item on a scale of 1 to 5, where 5 means "Very Satisfied" and 1 means "Very Dissatisfied." (without "don't know")

(N=413)

	Very satisfied	Satisfied	Neutral	Dissatisfied	Very dissatisfied
Q2-1. Overall quality of services provided by City	9.1%	49.9%	31.5%	8.3%	1.3%
Q2-2. Overall image of City	17.1%	54.5%	23.2%	3.7%	1.5%
Q2-3. Overall quality of life in City	22.2%	47.9%	24.9%	4.7%	0.2%
Q2-4. Quality of new development in City	19.1%	48.3%	26.7%	4.1%	1.8%
Q2-5. Overall quality of education system within City	4.3%	13.6%	36.2%	25.8%	20.0%
Q2-6. Overall feeling of safety in City	4.2%	26.8%	40.5%	20.1%	8.4%
Q2-7. Overall value that you receive for your City tax & fees	4.5%	31.5%	41.1%	14.4%	8.5%

Q3. Using a scale of 1 to 5, where a 5 is "Extremely Important" and a 1 is "Not Important," please indicate how important each of the following reasons are in your decision to keep your business in the City of Kansas City.

(N=413)

	Extremely important	Very important	Important	Less important	Not important	Not provided
Q3-1. Overall image of City	26.6%	37.8%	24.0%	5.6%	4.6%	1.5%
Q3-2. Low crime rate	44.3%	30.0%	17.9%	3.9%	2.7%	1.2%
Q3-3. Quality of local schools	32.9%	25.9%	16.5%	9.4%	13.8%	1.5%
Q3-4. Availability of trained employees	31.2%	37.5%	19.9%	5.6%	4.6%	1.2%
Q3-5. Level of taxation	28.6%	32.9%	24.5%	4.4%	7.7%	1.9%
Q3-6. Access to airports	18.9%	23.0%	27.1%	12.6%	17.4%	1.0%
Q3-7. Availability of workforce housing for employees	12.6%	28.8%	26.4%	13.6%	16.0%	2.7%
Q3-8. Proximity of businesses that are important to your business	18.9%	30.0%	25.7%	15.0%	9.0%	1.5%
Q3-9. Availability of public transportation	18.9%	23.5%	22.5%	20.8%	12.8%	1.5%
Q3-10. Availability of libraries, arts, & cultural amenities	17.2%	21.5%	26.2%	17.9%	15.5%	1.7%
Q3-11. Attitude of local government toward business	40.7%	34.9%	16.2%	3.4%	2.9%	1.9%
Q3-12. Availability of telecommunications, utilities, & other infrastructure	43.1%	40.4%	13.1%	1.2%	1.2%	1.0%
Q3-13. Availability of parks & open space	15.5%	24.9%	31.5%	15.7%	10.9%	1.5%

WITHOUT "NOT PROVIDED"

Q3. Using a scale of 1 to 5, where a 5 is "Extremely Important" and a 1 is "Not Important," please indicate how important each of the following reasons are in your decision to keep your business in the City of Kansas City. (without "not provided")

(N=413)

	Extremely important	Very important	Important	Less important	Not important
Q3-1. Overall image of City	27.0%	38.3%	24.3%	5.7%	4.7%
Q3-2. Low crime rate	44.9%	30.4%	18.1%	3.9%	2.7%
Q3-3. Quality of local schools	33.4%	26.3%	16.7%	9.6%	14.0%
Q3-4. Availability of trained employees	31.6%	38.0%	20.1%	5.6%	4.7%
Q3-5. Level of taxation	29.1%	33.6%	24.9%	4.4%	7.9%
Q3-6. Access to airports	19.1%	23.2%	27.4%	12.7%	17.6%
Q3-7. Availability of workforce housing for employees	12.9%	29.6%	27.1%	13.9%	16.4%
Q3-8. Proximity of businesses that are important to your business	19.2%	30.5%	26.0%	15.2%	9.1%
Q3-9. Availability of public transportation	19.2%	23.8%	22.9%	21.1%	13.0%
Q3-10. Availability of libraries, arts, & cultural amenities	17.5%	21.9%	26.6%	18.2%	15.8%
Q3-11. Attitude of local government toward business	41.5%	35.6%	16.5%	3.5%	3.0%
Q3-12. Availability of telecommunications, utilities, & other infrastructure	43.5%	40.8%	13.2%	1.2%	1.2%
Q3-13. Availability of parks & open space	15.7%	25.3%	31.9%	16.0%	11.1%

Q4. Please indicate if your business has used each of the services, departments, and programs listed below over the past TWO years.

(N=413)

	Yes	No
Q4-1. 311 call center	33.2%	66.8%
Q4-2. Business licensing	66.3%	33.7%
Q4-3. Tax collection	52.8%	47.2%
Q4-4. Municipal court	17.4%	82.6%
Q4-5. Code enforcement	30.0%	70.0%
Q4-6. Police-crime/safety response	59.1%	40.9%
Q4-7. Ambulance-medical emergency response	25.4%	74.6%
Q4-8. Fire incident response	17.9%	82.1%
Q4-9. Fire inspection	75.3%	24.7%
Q4-10. Health inspections	21.1%	78.9%
Q4-11. Regulated industries licensing/inspections	29.3%	70.7%
Q4-12. Building permits	28.6%	71.4%
Q4-13. Development review	12.6%	87.4%
Q4-14. Public incentives requests	6.1%	93.9%
Q4-15. Airport services	42.1%	57.9%
Q4-16. Water services	74.6%	25.4%
Q4-17. Stormwater drainage	52.5%	47.5%
Q4-18. Street maintenance	58.8%	41.2%
Q4-19. Sidewalk maintenance	40.2%	59.8%
Q4-20. MBE/WBE certification	11.9%	88.1%

Q4. Please indicate if your business has used each of the services, departments, and programs listed below over the past TWO years.

	Yes	No
Q4-21. Website usefulness (kcmo.gov)	45.0%	55.0%
Q4-22. KC Streetcar	27.8%	72.2%
Q4-23. KCATA bus service	22.5%	77.5%

Q4. If "Yes," please rate your overall satisfaction with these City services using a scale of 1 to 5, where 5 is "Very Satisfied" and 1 is "Very Dissatisfied."

(N=404)

	Very satisfied	Satisfied	Neutral	Dissatisfied	Very dissatisfied	Don't know
Q4-1. 311 call center	21.9%	35.0%	21.9%	15.3%	5.8%	0.0%
Q4-2. Business licensing	23.3%	40.2%	29.3%	1.9%	3.4%	1.9%
Q4-3. Tax collection	15.0%	34.1%	32.7%	6.5%	3.7%	7.9%
Q4-4. Municipal court	23.9%	26.8%	31.0%	12.7%	4.2%	1.4%
Q4-5. Code enforcement	13.7%	25.0%	33.1%	16.1%	12.1%	0.0%
Q4-6. Police-crime/safety response	32.4%	38.6%	14.9%	9.5%	3.7%	0.8%
Q4-7. Ambulance-medical emergency response	52.4%	37.9%	5.8%	1.9%	1.9%	0.0%
Q4-8. Fire incident response	58.1%	36.5%	2.7%	1.4%	0.0%	1.4%
Q4-9. Fire inspection	46.4%	37.2%	10.9%	1.6%	1.6%	2.3%
Q4-10. Health inspections	38.8%	35.3%	12.9%	5.9%	4.7%	2.4%
Q4-11. Regulated industries licensing/inspections	25.0%	36.2%	21.6%	9.5%	5.2%	2.6%
Q4-12. Building permits	21.6%	28.4%	23.3%	12.1%	10.3%	4.3%
Q4-13. Development review	19.2%	26.9%	19.2%	17.3%	11.5%	5.8%
Q4-14. Public incentives requests	12.0%	32.0%	32.0%	20.0%	4.0%	0.0%
Q4-15. Airport services	18.5%	41.6%	23.7%	11.0%	5.2%	0.0%

Q4. If "Yes," please rate your overall satisfaction with these City services using a scale of 1 to 5, where 5 is "Very Satisfied" and 1 is "Very Dissatisfied."

	Very satisfied	Satisfied	Neutral	Dissatisfied	Very dissatisfied	Don't know
Q4-16. Water services	21.3%	39.5%	22.6%	8.6%	6.6%	1.3%
Q4-17. Stormwater drainage	17.9%	31.1%	22.2%	16.0%	11.8%	0.9%
Q4-18. Street maintenance	9.3%	26.7%	28.8%	21.6%	13.1%	0.4%
Q4-19. Sidewalk maintenance	8.9%	28.0%	24.2%	22.9%	15.9%	0.0%
Q4-20. MBE/WBE certification	25.0%	25.0%	8.3%	20.8%	16.7%	4.2%
Q4-21. Website usefulness (kcmo.gov)	16.4%	42.1%	26.2%	9.8%	2.7%	2.7%
Q4-22. KC Streetcar	43.4%	38.9%	12.4%	0.9%	2.7%	1.8%
Q4-23. KCATA bus service	27.5%	45.1%	19.8%	3.3%	3.3%	1.1%

WITHOUT "DON'T KNOW"

Q4. If "Yes," please rate your overall satisfaction with these City services using a scale of 1 to 5, where 5 is "Very Satisfied" and 1 is "Very Dissatisfied." (without "don't know")

(N=404)

	Very satisfied	Satisfied	Neutral	Dissatisfied	Very dissatisfied
Q4-1. 311 call center	21.9%	35.0%	21.9%	15.3%	5.8%
Q4-2. Business licensing	23.8%	41.0%	29.9%	1.9%	3.4%
Q4-3. Tax collection	16.2%	37.1%	35.5%	7.1%	4.1%
Q4-4. Municipal court	24.3%	27.1%	31.4%	12.9%	4.3%
Q4-5. Code enforcement	13.7%	25.0%	33.1%	16.1%	12.1%
Q4-6. Police-crime/safety response	32.6%	38.9%	15.1%	9.6%	3.8%
Q4-7. Ambulance-medical emergency response	52.4%	37.9%	5.8%	1.9%	1.9%
Q4-8. Fire incident response	58.9%	37.0%	2.7%	1.4%	0.0%
Q4-9. Fire inspection	47.5%	38.0%	11.1%	1.7%	1.7%
Q4-10. Health inspections	39.8%	36.1%	13.3%	6.0%	4.8%
Q4-11. Regulated industries licensing/ inspections	25.7%	37.2%	22.1%	9.7%	5.3%
Q4-12. Building permits	22.5%	29.7%	24.3%	12.6%	10.8%
Q4-13. Development review	20.4%	28.6%	20.4%	18.4%	12.2%
Q4-14. Public incentives requests	12.0%	32.0%	32.0%	20.0%	4.0%
Q4-15. Airport services	18.5%	41.6%	23.7%	11.0%	5.2%
Q4-16. Water services	21.5%	40.1%	22.9%	8.8%	6.7%
Q4-17. Stormwater drainage	18.1%	31.4%	22.4%	16.2%	11.9%
Q4-18. Street maintenance	9.4%	26.8%	28.9%	21.7%	13.2%
Q4-19. Sidewalk maintenance	8.9%	28.0%	24.2%	22.9%	15.9%
Q4-20. MBE/WBE certification	26.1%	26.1%	8.7%	21.7%	17.4%

Q4. If "Yes," please rate your overall satisfaction with these City services using a scale of 1 to 5, where 5 is "Very Satisfied" and 1 is "Very Dissatisfied." (without "don't know")

	Very satisfied	Satisfied	Neutral	Dissatisfied	Very dissatisfied
Q4-21. Website usefulness (kcmo.gov)	16.9%	43.3%	27.0%	10.1%	2.8%
Q4-22. KC Streetcar	44.1%	39.6%	12.6%	0.9%	2.7%
Q4-23. KCATA bus service	27.8%	45.6%	20.0%	3.3%	3.3%

Q5. Which THREE of the services, City departments, or programs listed in Question 4 are MOST IMPORTANT to your business?

Q5. Top choice	Number	Percent
311 call center	10	2.4 %
Business licensing	29	7.0 %
Tax collection	9	2.2 %
Municipal court	4	1.0 %
Code enforcement	10	2.4 %
Police-crime/safety response	100	24.2 %
Ambulance-medical emergency response	7	1.7 %
Fire incident response	7	1.7 %
Fire inspection	9	2.2 %
Health inspections	9	2.2 %
Regulated industries licensing/inspections	10	2.4 %
Building permits	15	3.6 %
Development review	4	1.0 %
Public incentives requests	2	0.5 %
Airport services	9	2.2 %
Water services	24	5.8 %
Stormwater drainage	10	2.4 %
Street maintenance	25	6.1 %
MBE/WBE certification	4	1.0 %
Website usefulness (kcmo.gov)	3	0.7 %
KC Streetcar	4	1.0 %
KCATA bus service	9	2.2 %
None chosen	100	24.2 %
Total	413	100.0 %

Q5. Which THREE of the services, City departments, or programs listed in Question 4 are MOST IMPORTANT to your business?

Q5. 2nd choice	Number	Percent
311 call center	5	1.2 %
Business licensing	18	4.4 %
Tax collection	14	3.4 %
Municipal court	2	0.5 %
Code enforcement	10	2.4 %
Police-crime/safety response	44	10.7 %
Ambulance-medical emergency response	28	6.8 %
Fire incident response	24	5.8 %
Fire inspection	12	2.9 %
Health inspections	10	2.4 %
Regulated industries licensing/inspections	5	1.2 %
Building permits	10	2.4 %
Development review	7	1.7 %
Public incentives requests	2	0.5 %
Airport services	19	4.6 %
Water services	19	4.6 %
Stormwater drainage	14	3.4 %
Street maintenance	26	6.3 %
Sidewalk maintenance	7	1.7 %
MBE/WBE certification	1	0.2 %
Website usefulness (kcmo.gov)	5	1.2 %
KC Streetcar	1	0.2 %
KCATA bus service	5	1.2 %
None chosen	125	30.3 %
Total	413	100.0 %

Q5. Which THREE of the services, City departments, or programs listed in Question 4 are MOST IMPORTANT to your business?

Q5. 3rd choice	Number	Percent
311 call center	2	0.5 %
Business licensing	20	4.8 %
Tax collection	9	2.2 %
Municipal court	1	0.2 %
Code enforcement	8	1.9 %
Police-crime/safety response	19	4.6 %
Ambulance-medical emergency response	10	2.4 %
Fire incident response	18	4.4 %
Fire inspection	10	2.4 %
Health inspections	11	2.7 %
Regulated industries licensing/inspections	9	2.2 %
Building permits	11	2.7 %
Development review	5	1.2 %
Public incentives requests	5	1.2 %
Airport services	13	3.1 %
Water services	31	7.5 %
Stormwater drainage	8	1.9 %
Street maintenance	31	7.5 %
Sidewalk maintenance	6	1.5 %
MBE/WBE certification	3	0.7 %
Website usefulness (kcmo.gov)	15	3.6 %
KC Streetcar	7	1.7 %
KCATA bus service	9	2.2 %
None chosen	152	36.8 %
Total	413	100.0 %

Q5. Which THREE of the services, City departments, or programs listed in Question 4 are MOST IMPORTANT to your business? (top 3)

Q5. Sum of top 3 choices	Number	Percent
311 call center	17	4.1 %
Business licensing	67	16.2 %
Tax collection	32	7.7 %
Municipal court	7	1.7 %
Code enforcement	28	6.8 %
Police-crime/safety response	163	39.5 %
Ambulance-medical emergency response	45	10.9 %
Fire incident response	49	11.9 %
Fire inspection	31	7.5 %
Health inspections	30	7.3 %
Regulated industries licensing/inspections	24	5.8 %
Building permits	36	8.7 %
Development review	16	3.9 %
Public incentives requests	9	2.2 %
Airport services	41	9.9 %
Water services	74	17.9 %
Stormwater drainage	32	7.7 %
Street maintenance	82	19.9 %
Sidewalk maintenance	13	3.1 %
MBE/WBE certification	8	1.9 %
Website usefulness (kcmo.gov)	23	5.6 %
KC Streetcar	12	2.9 %
KCATA bus service	23	5.6 %
None chosen	100	24.2 %
Total	962	

Q6. Please rate the following several issues about the work force in Kansas City using a scale of 1 to 4, where 4 means "Excellent" and 1 means "Poor."

(N=413)

	Excellent	Good	Average	Poor	Don't know
Q6-1. Availability of workers	9.9%	30.8%	33.9%	17.7%	7.7%
Q6-2. Quality of workers	10.4%	32.4%	35.4%	14.5%	7.3%
Q6-3. Stability of workers	12.3%	30.0%	33.7%	15.7%	8.2%
Q6-4. Education/technical skills of workers	11.6%	27.8%	35.1%	14.0%	11.4%
Q6-5. Productivity of workers	14.0%	34.6%	35.4%	9.0%	7.0%
Q6-6. Kansas City as a place to work	27.8%	43.6%	20.3%	2.2%	6.1%

WITHOUT "DON'T KNOW"

Q6. Please rate the following several issues about the work force in Kansas City using a scale of 1 to 4, where 4 means "Excellent" and 1 means "Poor." (without "don't know")

(N=413)

	Excellent	Good	Average	Poor
Q6-1. Availability of workers	10.8%	33.3%	36.7%	19.2%
Q6-2. Quality of workers	11.2%	35.0%	38.1%	15.7%
Q6-3. Stability of workers	13.5%	32.7%	36.7%	17.2%
Q6-4. Education/technical skills of workers	13.1%	31.4%	39.6%	15.8%
Q6-5. Productivity of workers	15.1%	37.2%	38.0%	9.6%
Q6-6. Kansas City as a place to work	29.6%	46.4%	21.6%	2.3%

Q7. Which TWO of the items listed in Question 6 are MOST IMPORTANT in your decision to stay in Kansas City, Missouri?

Q7. Top choice	Number	Percent
Availability of workers	86	20.8 %
Quality of workers	78	18.9 %
Stability of workers	22	5.3 %
Education/technical skills of workers	32	7.7 %
Productivity of workers	20	4.8 %
Kansas City as a place to work	54	13.1 %
None chosen	121	29.3 %
Total	413	100.0 %

Q7. Which TWO of the items listed in Question 6 are MOST IMPORTANT in your decision to stay in Kansas City, Missouri?

Q7. 2nd choice	Number	Percent
Availability of workers	39	9.4 %
Quality of workers	82	19.9 %
Stability of workers	53	12.8 %
Education/technical skills of workers	37	9.0 %
Productivity of workers	37	9.0 %
Kansas City as a place to work	22	5.3 %
None chosen	143	34.6 %
Total	413	100.0 %

Q7. Which TWO of the items listed in Question 6 are MOST IMPORTANT in your decision to stay in Kansas City, Missouri? (top 2)

Q7. Sum of top 2 choices	Number	Percent
Availability of workers	125	30.3 %
Quality of workers	160	38.7 %
Stability of workers	75	18.2 %
Education/technical skills of workers	69	16.7 %
Productivity of workers	57	13.8 %
Kansas City as a place to work	76	18.4 %
None chosen	121	29.3 %
Total	683	

Q8. Which of the following best describes your business/organization's sector?

Q8. What best describes your business/ organization's sector	Number	Percent
Agriculture, Forestry, Fishing & Hunting	4	1.0 %
Mining	1	0.2 %
Utilities	1	0.2 %
Construction	33	8.0 %
Communications	4	1.0 %
Manufacturing	30	7.3 %
Wholesale Trade	27	6.5 %
Retail Trade	56	13.6 %
Transportation & Warehousing	20	4.8 %
Information	5	1.2 %
Finance & Insurance	25	6.1 %
Real Estate & Rental Leasing	15	3.6 %
Professional, Scientific & Technical Services	30	7.3 %
Administrative, Support, Waste Management, Remediation Services	2	0.5 %
Educational Services	11	2.7 %
Health Care & Social Assistance	40	9.7 %
Arts, Entertainment, & Recreation	30	7.3 %
Accommodation & Food Services	20	4.8 %
Public Administration	30	7.3 %
Other Services	29	7.0 %
Total	413	100.0 %

Q9. How long has your business/organization been located in Kansas City, Missouri?

Q9. How long has your business/organization been located in Kansas City, Missouri	Number	Percent
Less than one year	5	1.2 %
1-2 years	9	2.2 %
3-5 years	13	3.1 %
6-10 years	38	9.2 %
11-20 years	77	18.6 %
21+ years	267	64.6 %
Not provided	4	1.0 %
Total	413	100.0 %

WITHOUT "NOT PROVIDED"**Q9. How long has your business/organization been located in Kansas City, Missouri? (without "not provided")**

Q9. How long has your business/organization been located in Kansas City, Missouri	Number	Percent
Less than one year	5	1.2 %
1-2 years	9	2.2 %
3-5 years	13	3.2 %
6-10 years	38	9.3 %
11-20 years	77	18.8 %
21+ years	267	65.3 %
Total	409	100.0 %

Q10. Do you lease or own your facility?

<u>Q10. Do you lease or own your facility</u>	<u>Number</u>	<u>Percent</u>
Own	240	58.1 %
Lease	166	40.2 %
Not provided	7	1.7 %
Total	413	100.0 %

WITHOUT "NOT PROVIDED"**Q10. Do you lease or own your facility? (without "not provided")**

<u>Q10. Do you lease or own your facility</u>	<u>Number</u>	<u>Percent</u>
Own	240	59.1 %
Lease	166	40.9 %
Total	406	100.0 %

Q11. Is your business/organization currently a member of a local business/trade association?

<u>Q11. Is your business/organization currently a member of a local business/trade association</u>	<u>Number</u>	<u>Percent</u>
Yes	181	43.8 %
No	211	51.1 %
Not provided	21	5.1 %
Total	413	100.0 %

WITHOUT "NOT PROVIDED"**Q11. Is your business/organization currently a member of a local business/trade association? (without "not provided")**

<u>Q11. Is your business/organization currently a member of a local business/trade association</u>	<u>Number</u>	<u>Percent</u>
Yes	181	46.2 %
No	211	53.8 %
Total	392	100.0 %

Q12. Is your personal residence in KCMO?

<u>Q12. Is your personal residence in KCMO</u>	<u>Number</u>	<u>Percent</u>
Yes	184	44.6 %
No	221	53.5 %
Not provided	8	1.9 %
Total	413	100.0 %

Q12. Is your personal residence in KCMO? (without "not provided")

<u>Q12. Is your personal residence in KCMO</u>	<u>Number</u>	<u>Percent</u>
Yes	184	45.4 %
No	221	54.6 %
Total	405	100.0 %

Q13. Approximately how many employees does your organization employ at the location where you received this survey?

Q13. How many employees does your organization employ at the location where you received this survey

	Number	Percent
Less than 10	169	40.9 %
10-24	117	28.3 %
25-49	65	15.7 %
50-99	34	8.2 %
100-249	23	5.6 %
250-499	2	0.5 %
Not provided	3	0.7 %
Total	413	100.0 %

WITHOUT "NOT PROVIDED"**Q13. Approximately how many employees does your organization employ at the location where you received this survey? (without "not provided")**

Q13. How many employees does your organization employ at the location where you received this survey

	Number	Percent
Less than 10	169	41.2 %
10-24	117	28.5 %
25-49	65	15.9 %
50-99	34	8.3 %
100-249	23	5.6 %
250-499	2	0.5 %
Total	410	100.0 %

Q14. Does your company have employees at other locations in the metropolitan Kansas City area?

Q14. Does your company have employees at other locations in the metropolitan Kansas City

area	Number	Percent
Yes	106	25.7 %
No	302	73.1 %
Not provided	5	1.2 %
Total	413	100.0 %

WITHOUT "NOT PROVIDED"

Q14. Does your company have employees at other locations in the metropolitan Kansas City area? (without "not provided")

Q14. Does your company have employees at other locations in the metropolitan Kansas City

area	Number	Percent
Yes	106	26.0 %
No	302	74.0 %
Total	408	100.0 %

Q14-1. (If YES to Question 14) How many employees do you have at other locations in the Kansas City area?

Q14-1. How many employees do you have at other locations in the Kansas City area

	Number	Percent
Less than 10	22	20.8 %
10-24	17	16.0 %
25-49	14	13.2 %
50-99	12	11.3 %
100-249	11	10.4 %
250-499	6	5.7 %
500+	1	0.9 %
Not provided	23	21.7 %
Total	106	100.0 %

WITHOUT "NOT PROVIDED"**Q14-1. (If YES to Question 14) How many employees do you have at other locations in the Kansas City area? (without "not provided")**

Q14-1. How many employees do you have at other locations in the Kansas City area

	Number	Percent
Less than 10	22	26.5 %
10-24	17	20.5 %
25-49	14	16.9 %
50-99	12	14.5 %
100-249	11	13.3 %
250-499	6	7.2 %
500+	1	1.2 %
Total	83	100.0 %

Q15. For the last FIVE years, please indicate the sources of funding for your business needs.

<u>Q15. Sources of funding for your business needs</u>	<u>Number</u>	<u>Percent</u>
Personal savings	56	13.6 %
Loans-family/friends	20	4.8 %
Bank loans	108	26.2 %
Working capital	126	30.5 %
Asset backed loans	28	6.8 %
Credit cards	48	11.6 %
Government grants/ funding/incentives	20	4.8 %
Equity financing	11	2.7 %
Not needed	123	29.8 %
Total	540	

WITHOUT "NOT NEEDED"**Q15. For the last FIVE years, please indicate the sources of funding for your business needs. (without "not needed")**

<u>Q15. Sources of funding for your business needs</u>	<u>Number</u>	<u>Percent</u>
Personal savings	56	19.3 %
Loans-family/friends	20	6.9 %
Bank loans	108	37.2 %
Working capital	126	43.4 %
Asset backed loans	28	9.7 %
Credit cards	48	16.6 %
Government grants/ funding/incentives	20	6.9 %
Equity financing	11	3.8 %
Total	417	

Q16. In the next THREE years, is your organization planning to do any of the following?

Q16. What is your organization planning to do in next three years	Number	Percent
Expanding/renovating your facility in its current location	104	25.2 %
Relocating to another location in Kansas City, Missouri	36	8.7 %
Relocating to another location outside Kansas City, Missouri	25	6.1 %
Decreasing employment	8	1.9 %
Increasing employment	110	26.6 %
Closing	5	1.2 %
No plans at present to do any of these	207	50.1 %
Total	495	

Q16-2. Where do you plan on moving to another location in Kansas City?

Q16-2. Where are you relocating to	Number	Percent
Not determined	25	69.4 %
KCMO	2	5.6 %
Depends on what's available at the time	1	2.8 %
IVANHOE	1	2.8 %
9229 WARD PKWY	1	2.8 %
11000 NW PRAIRIE VIEW RD	1	2.8 %
Bannister & Troost	1	2.8 %
MIDTOWN	1	2.8 %
NEARBY NEIGHBORHOOD	1	2.8 %
Blue Ridge Blvd	1	2.8 %
Waldo	1	2.8 %
Total	36	100.0 %

Q16-2. Why do you plan on moving to another location in Kansas City?

<u>Q16-2. Why are you relocating</u>	<u>Number</u>	<u>Percent</u>
More space	3	15.8 %
Expanding	1	5.3 %
NORTH LOCATION	1	5.3 %
Our current building will not allow us to expand much more to house growth	1	5.3 %
EXPANDING	1	5.3 %
SMALLER OFFICE, CHEAPER	1	5.3 %
NOT WELCOME HERE	1	5.3 %
Merger	1	5.3 %
Closer to city	1	5.3 %
Not enough space	1	5.3 %
Space	1	5.3 %
SAFETY/SPACE/IMAGE	1	5.3 %
The violence around my current location	1	5.3 %
Location	1	5.3 %
OWN THE PROPERTY ALREADY	1	5.3 %
BIGGER SPACE AND CURRENT LEASE EXPIRES	1	5.3 %
<u>Bought a building</u>	<u>1</u>	<u>5.3 %</u>
Total	19	100.0 %

Q16-3. Where do you plan on moving to another location outside of Kansas City?

<u>Q16-3. Where/what city are you relocating to</u>	<u>Number</u>	<u>Percent</u>
Not determined	11	44.0 %
Kansas	4	16.0 %
DALLAS AREA	1	4.0 %
SOUTH	1	4.0 %
Lees Summit	1	4.0 %
NKC	1	4.0 %
SHAWNEE KS	1	4.0 %
OVERLAND PARK KS	1	4.0 %
RIVERSIDE	1	4.0 %
Platte or Clay County	1	4.0 %
Savannah	1	4.0 %
<u>Across the country</u>	<u>1</u>	<u>4.0 %</u>
Total	25	100.0 %

Q16-3. Why do you plan on moving to another location outside of Kansas City?

<u>Q16-3. Why are you relocating to another city</u>	<u>Number</u>	<u>Percent</u>
Taxes	3	18.8 %
CHEAPER WATER AND TAXES	1	6.3 %
EASIER TO EXPAND	1	6.3 %
Growth	1	6.3 %
EXPENSES	1	6.3 %
ACCESS FOR TRUCK	1	6.3 %
Additional branches	1	6.3 %
EARNINGS TAX	1	6.3 %
LOWER CRIME	1	6.3 %
TAX INCENTIVE	1	6.3 %
Sewer issues	1	6.3 %
New opportunity	1	6.3 %
KC zoning no longer allows new billboards	1	6.3 %
Location	1	6.3 %
Total	16	100.0 %

Q16-4. Please indicate the anticipated number of layoffs:

<u>Q16-4. What is the anticipated number of layoffs</u>	<u>Number</u>	<u>Percent</u>
2	2	28.6 %
3	1	14.3 %
4	1	14.3 %
15	1	14.3 %
50	1	14.3 %
100	1	14.3 %
Total	7	100.0 %

Q16-5. Please indicate the anticipated number of new hires:

<u>Q16-5. What is the anticipated number of new hires</u>	<u>Number</u>	<u>Percent</u>
5 or less	44	62.0 %
6-10	8	11.3 %
11-20	11	15.5 %
21-30	6	8.5 %
31-50	1	1.4 %
51+	1	1.4 %
Total	71	100.0 %

Q16-5. Please indicate the hourly wage level:

<u>Q16-5. What is the hourly wage level</u>	<u>Number</u>	<u>Percent</u>
9.0	1	1.7 %
10.0	2	3.3 %
11.0	4	6.7 %
11.6	1	1.7 %
12.0	1	1.7 %
13.0	1	1.7 %
13.5	1	1.7 %
14.0	1	1.7 %
14.5	1	1.7 %
15.0	13	21.7 %
17.0	4	6.7 %
18.0	2	3.3 %
19.0	2	3.3 %
20.0	3	5.0 %
22.0	1	1.7 %
25.0	8	13.3 %
30.0	4	6.7 %
32.0	1	1.7 %
35.0	3	5.0 %
40.0	1	1.7 %
50.0	2	3.3 %
58.0	1	1.7 %
60.0	1	1.7 %
66.0	1	1.7 %
Total	60	100.0 %

Q16-6. Why are you planning on closing?

<u>Q16-6. Why are you closing</u>	<u>Number</u>	<u>Percent</u>
Retirement	2	66.7 %
KC limits billboards which limits the growth of my business	1	33.3 %
Total	3	100.0 %

Q17. Are you aware of the following services provided by the Economic Development Corporation of KCMO?

Q17. Are you aware of following services
provided by Economic Development Corporation
of KCMO

	Number	Percent
Financing	70	16.9 %
Job/investment incentives	66	16.0 %
Redevelopment incentives	81	19.6 %
Property tax abatement	87	21.1 %
Tax increment financing	85	20.6 %
Training funds	48	11.6 %
Regulatory aid	34	8.2 %
City service aid	45	10.9 %
Real estate aid	37	9.0 %
Total	553	

Q18. Please indicate if you are aware of each of the following business assistance programs.

(N=413)

	Yes	No
Q18-1. Economic Development Corporation of KCMO	48.7%	51.3%
Q18-2. KC Bizcare	16.9%	83.1%
Q18-3. KCSOURCELINK	19.4%	80.6%
Q18-4. Justine Petersen Small Business Loans	7.7%	92.3%
Q18-5. Full Employment Council	37.8%	62.2%
Q18-6. Metropolitan Community College	59.6%	40.4%
Q18-7. Altcap	10.2%	89.8%

Q18. Please indicate if you have used of each of the following business assistance programs.

(N=413)

	Yes	No
Q18-1. Economic Development Corporation of KCMO	12.1%	87.9%
Q18-2. KC Bizcare	3.6%	96.4%
Q18-3. KCSOURCELINK	4.4%	95.6%
Q18-4. Justine Petersen Small Business Loans	1.5%	98.5%
Q18-5. Full Employment Council	9.2%	90.8%
Q18-6. Metropolitan Community College	13.3%	86.7%
Q18-7. Altcap	1.0%	99.0%

Q18. Next, please rate your overall satisfaction with these programs using a scale of 1 to 5, where 5 means "Very Satisfied" and 1 means "Very Dissatisfied."

(N=121)

	Very satisfied	Satisfied	Neutral	Dissatisfied	Very dissatisfied	Don't know
Q18-1. Economic Development Corporation of KCMO	32.6%	39.1%	13.0%	6.5%	8.7%	0.0%
Q18-2. KC Bizcare	18.2%	36.4%	45.5%	0.0%	0.0%	0.0%
Q18-3. KCSOURCELINK	23.1%	30.8%	30.8%	7.7%	0.0%	7.7%
Q18-4. Justine Petersen Small Business Loans	40.0%	40.0%	20.0%	0.0%	0.0%	0.0%
Q18-5. Full Employment Council	9.1%	39.4%	36.4%	9.1%	3.0%	3.0%
Q18-6. Metropolitan Community College	34.0%	34.0%	26.0%	2.0%	0.0%	4.0%
Q18-7. Altcap	0.0%	75.0%	25.0%	0.0%	0.0%	0.0%

WITHOUT "DON'T KNOW"

Q18. Next, please rate your overall satisfaction with these programs using a scale of 1 to 5, where 5 means "Very Satisfied" and 1 means "Very Dissatisfied." (without "don't know")

(N=121)

	Very satisfied	Satisfied	Neutral	Dissatisfied	Very dissatisfied
Q18-1. Economic Development Corporation of KCMO	32.6%	39.1%	13.0%	6.5%	8.7%
Q18-2. KC Bizcare	18.2%	36.4%	45.5%	0.0%	0.0%
Q18-3. KCSOURCELINK	25.0%	33.3%	33.3%	8.3%	0.0%
Q18-4. Justine Petersen Small Business Loans	40.0%	40.0%	20.0%	0.0%	0.0%
Q18-5. Full Employment Council	9.4%	40.6%	37.5%	9.4%	3.1%
Q18-6. Metropolitan Community College	35.4%	35.4%	27.1%	2.1%	0.0%
Q18-7. Altcap	0.0%	75.0%	25.0%	0.0%	0.0%

Q19. Does your company currently sell any products/services outside of the United States?

Q19. Does your company currently sell any products/services outside United States	Number	Percent
Yes	47	11.4 %
No	355	86.0 %
Not currently but would like to	5	1.2 %
Not provided	6	1.5 %
Total	413	100.0 %

WITHOUT "NOT PROVIDED"

Q19. Does your company currently sell any products/services outside of the United States? (without "not provided")

Q19. Does your company currently sell any products/services outside United States	Number	Percent
Yes	47	11.5 %
No	355	87.2 %
Not currently but would like to	5	1.2 %
Total	407	100.0 %

Q20. Which of the following are your TWO preferred methods of getting information about business assistance programs?

Q20. Your preferred methods of getting information about business assistance programs	Number	Percent
Email	200	48.4 %
Personal visit	29	7.0 %
Newsletter (mailed)	123	29.8 %
Newsletter (emailed)	78	18.9 %
Social media	41	9.9 %
EDC website	56	13.6 %
Total	527	

Q21. Please indicate if you are interested in assistance in any of the following areas.

Q21. In what areas are you interested in assistance	Number	Percent
Financial assistance	32	7.7 %
Workforce training	33	8.0 %
Real estate development assistance	28	6.8 %
Government services/regulations	9	2.2 %
Exports	2	0.5 %
Other	4	1.0 %
Total	108	

Q21. Other

Q21-6. Other	Number	Percent
LABOR RESOURCES	1	25.0 %
RECRUITING	1	25.0 %
TAX CREDITS	1	25.0 %
Sidewalk help	1	25.0 %
Total	4	100.0 %

Zone

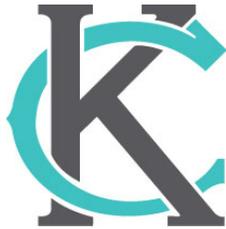
<u>Zone</u>	<u>Number</u>	<u>Percent</u>
EAST	100	24.2 %
NORTH	103	24.9 %
SOUTH	102	24.7 %
WEST	108	26.2 %
Total	413	100.0 %

Sector

<u>Sector</u>	<u>Number</u>	<u>Percent</u>
Specialized Manufacturing	30	7.3 %
Supply Chain Management	103	24.9 %
Financial & Technical Services	30	7.3 %
Design & Engineering	30	7.3 %
Health Sciences & Services	40	9.7 %
Arts	30	7.3 %
Non-Profit Management	30	7.3 %
Other	120	29.1 %
Total	413	100.0 %

Section 5

Survey Instrument



October 2018

Dear Kansas City Employer:

Thank you for choosing Kansas City as a place to do business!

The City of Kansas City, Missouri and the Economic Development Corporation (EDC) of Kansas City value your company and recognize your importance to making Kansas City a great place to do business. Your perspective is important to us. We would like to offer an opportunity for you to provide feedback about operating a business in Kansas City, Missouri.

We kindly request your participation in the 2018 Annual Kansas City Employer Survey. Now in its eighth year, the survey helps the EDC and City leadership identify issues that affect businesses and determine potential solutions to problems so you receive services more effectively.

Please complete and return the survey at your earliest convenience. A postage-paid envelope -- addressed to ETC Institute, the contracting agency that conducts this survey -- is enclosed. You may also complete the survey online at kcmo2018bizsurvey.com.

Your responses will remain confidential. If you have a specific need for EDC or City services, please indicate that need in the space provided on the last page of the survey.

We plan to have the survey results completed and available by January 2019. A copy of the 2018 results will be accessible on the EDC website at www.edckc.com and the City of Kansas City, Missouri website at www.kcmo.gov.

If you have any questions concerning the process, please call Jim Malle at the EDC at 816-691-2127 or at jmalle@edckc.com.

Thank you for taking the time to help us improve the business climate in Kansas City, Missouri.

Sincerely,

Sylvester "Sly" James
Mayor
Kansas City, Missouri

Robert Langenkamp
President & CEO
Economic Development Corporation of Kansas City

2018 Kansas City, Missouri Employer Survey

This survey is sponsored by the City of Kansas City, Missouri and the Economic Development Corporation of Kansas City, Missouri and is designed to improve the services to Kansas City, Missouri's businesses. If you have questions, please call Jim Malle at 816-691-2127 or email at jmalle@edckc.com for clarification. Your responses are confidential unless you indicate a need for a response at the end of this survey.

1. How would you rate Kansas City, Missouri overall as a place to do business?

(1) Excellent (3) Average (5) Poor
 (2) Good (4) Below Average (9) Don't Know

2. Several items that may influence your perception of the City of Kansas City, Missouri are listed below. Please rate each item on a scale of 1 to 5, where 5 means "Very Satisfied" and 1 means "Very Dissatisfied."

How satisfied are you with...	Very Satisfied	Satisfied	Neutral	Dissatisfied	Very Dissatisfied	Don't Know
1. Overall quality of services provided by the City	5	4	3	2	1	9
2. Overall image of the City	5	4	3	2	1	9
3. Overall quality of life in the City	5	4	3	2	1	9
4. Quality of new development in the City	5	4	3	2	1	9
5. Overall quality of the education system within the City	5	4	3	2	1	9
6. Overall feeling of safety in the City	5	4	3	2	1	9
7. Overall value that you receive for your City tax dollars and fees	5	4	3	2	1	9

3. Using a scale of 1 to 5, where 5 is "Extremely Important" and 1 is "Not Important," please indicate how important each of the following reasons are in your decision to keep your business in the City of Kansas City.

Reason	Extremely Important	Very Important	Important	Less Important	Not Important
01. Overall image of the City	5	4	3	2	1
02. Low crime rate	5	4	3	2	1
03. Quality of local schools	5	4	3	2	1
04. Availability of trained employees	5	4	3	2	1
05. Level of taxation	5	4	3	2	1
06. Access to airports	5	4	3	2	1
07. Availability of workforce housing for employees	5	4	3	2	1
08. Proximity of businesses that are important to your business	5	4	3	2	1
09. Availability of public transportation	5	4	3	2	1
10. Availability of libraries, arts, and cultural amenities	5	4	3	2	1
11. Attitude of local government toward business	5	4	3	2	1
12. Availability of telecommunications, utilities, and other infrastructure	5	4	3	2	1
13. Availability of parks and open space	5	4	3	2	1

4. Please indicate if your business has used each of the services, departments, and programs listed below over the past TWO years. If "Yes," rate your overall satisfaction with these City services using a scale of 1 to 5, where 5 is "Very Satisfied" and 1 is "Very Dissatisfied."

Department/Service/Program	Has your business used this service over the past 2 years?		Very Satisfied	Satisfied	Neutral	Dissatisfied	Very Dissatisfied	Don't Know
	Yes	No						
01. 311 call center	Yes	No	5	4	3	2	1	9
02. Business licensing	Yes	No	5	4	3	2	1	9
03. Tax collection	Yes	No	5	4	3	2	1	9
04. Municipal court	Yes	No	5	4	3	2	1	9
05. Code enforcement	Yes	No	5	4	3	2	1	9
06. Police - crime/safety response	Yes	No	5	4	3	2	1	9
07. Ambulance - medical emergency response	Yes	No	5	4	3	2	1	9
08. Fire incident response	Yes	No	5	4	3	2	1	9
09. Fire inspection	Yes	No	5	4	3	2	1	9
10. Health inspections	Yes	No	5	4	3	2	1	9
11. Regulated Industries licensing/inspections	Yes	No	5	4	3	2	1	9
12. Building permits	Yes	No	5	4	3	2	1	9
13. Development review	Yes	No	5	4	3	2	1	9
14. Public incentives requests	Yes	No	5	4	3	2	1	9
15. Airport services	Yes	No	5	4	3	2	1	9
16. Water services	Yes	No	5	4	3	2	1	9
17. Stormwater drainage	Yes	No	5	4	3	2	1	9
18. Street maintenance	Yes	No	5	4	3	2	1	9
19. Sidewalk maintenance	Yes	No	5	4	3	2	1	9
20. MBE/WBE certification	Yes	No	5	4	3	2	1	9
21. Website usefulness (kcmo.gov)	Yes	No	5	4	3	2	1	9
22. KC Streetcar	Yes	No	5	4	3	2	1	9
23. KCATA bus service	Yes	No	5	4	3	2	1	9

5. Which THREE of the services, City departments, or programs listed in Question 4 are MOST IMPORTANT to your business? [Write in your answers below using the numbers from the list in Question 4, or circle "NONE."]

1st: _____ 2nd: _____ 3rd: _____ NONE

6. Please rate the following items concerning the workforce in Kansas City using a scale of 1 to 4, where 4 means "Excellent" and 1 means "Poor."

Workforce	Excellent	Good	Average	Poor	Don't Know
1. The availability of workers	4	3	2	1	9
2. The quality of workers	4	3	2	1	9
3. The stability of workers	4	3	2	1	9
4. The education/technical skills of workers	4	3	2	1	9
5. The productivity of workers	4	3	2	1	9
6. Kansas City as a place to work	4	3	2	1	9

7. Which TWO of the items listed in Question 6 are MOST IMPORTANT in your decision to stay in Kansas City, Missouri? [Write in your answers below using the numbers from the list in Question 6, or circle "NONE."]

1st: _____ 2nd: _____ NONE

8. Which of the following best describes your business/organization's sector?

- | | |
|---|---|
| <input type="checkbox"/> (01) Agriculture, Forestry, Fishing, and Hunting | <input type="checkbox"/> (12) Real Estate and Rental Leasing |
| <input type="checkbox"/> (02) Mining | <input type="checkbox"/> (13) Professional, Scientific, and Technical Services |
| <input type="checkbox"/> (03) Utilities | <input type="checkbox"/> (14) Management of Companies and Enterprises |
| <input type="checkbox"/> (04) Construction | <input type="checkbox"/> (15) Administrative, Support, Waste Management, Remediation Services |
| <input type="checkbox"/> (05) Communications | <input type="checkbox"/> (16) Educational Services |
| <input type="checkbox"/> (06) Manufacturing | <input type="checkbox"/> (17) Health Care and Social Assistance |
| <input type="checkbox"/> (07) Wholesale Trade | <input type="checkbox"/> (18) Arts, Entertainment, and Recreation |
| <input type="checkbox"/> (08) Retail Trade | <input type="checkbox"/> (19) Accommodation and Food Services |
| <input type="checkbox"/> (09) Transportation and Warehousing | <input type="checkbox"/> (20) Public Administration |
| <input type="checkbox"/> (10) Information | <input type="checkbox"/> (21) Other Services |
| <input type="checkbox"/> (11) Finance and Insurance | |

9. How long has your business/organization been located in Kansas City, Missouri?

- | | | |
|---|---|---|
| <input type="checkbox"/> (1) Less than one year | <input type="checkbox"/> (3) 3-5 years | <input type="checkbox"/> (5) 11-20 years |
| <input type="checkbox"/> (2) 1-2 years | <input type="checkbox"/> (4) 6-10 years | <input type="checkbox"/> (6) 21 or more years |

10. Do you lease or own your facility? (1) Own (2) Lease

11. Is your business/organization currently a member of a local business/trade association?

- (1) Yes (2) No

12. Is your personal residence in KCMO? (1) Yes (2) No

13. Approximately how many employees does your organization employ at the location where you received this survey? [Do not include employees who work at other locations that are owned/operated by your organization.]

- | | | | |
|---|------------------------------------|--------------------------------------|--|
| <input type="checkbox"/> (1) Less than 10 | <input type="checkbox"/> (3) 25-49 | <input type="checkbox"/> (5) 100-249 | <input type="checkbox"/> (7) 500 or more |
| <input type="checkbox"/> (2) 10-24 | <input type="checkbox"/> (4) 50-99 | <input type="checkbox"/> (6) 250-499 | |

14. Does your company have employees at other locations in the metropolitan Kansas City area?

- (1) Yes (How many employees do you have at other locations in the Kansas City area? _____)
 (2) No

15. For the last FIVE years, please indicate the sources of funding for your business needs. [Check all that apply.]

- | | | |
|---|---|---|
| <input type="checkbox"/> (1) Personal Savings | <input type="checkbox"/> (5) Asset Backed Loans | <input type="checkbox"/> (8) Equity Financing |
| <input type="checkbox"/> (2) Loans-Family/Friends | <input type="checkbox"/> (6) Credit Cards | <input type="checkbox"/> (9) Not Needed |
| <input type="checkbox"/> (3) Bank Loans | <input type="checkbox"/> (7) Government Grants/
Funding/Incentives | |
| <input type="checkbox"/> (4) Working Capital | | |

16. In the next THREE years, is your organization planning to do any of the following? [Check all that apply.]

- (1) Expanding/renovating your facility in its current location
 (2) Relocating to another location in Kansas City, Missouri
 (Where? _____ Why? _____)
 (3) Relocating to another location outside Kansas City, Missouri
 (What city/where? _____ Why? _____)
 (4) Decreasing employment (Please indicate the anticipated number of layoffs: _____)
 (5) Increasing employment
 (Please indicate the anticipated number of new hires: _____ HOURLY Wage Level: _____)
 (6) Closing (Why? _____)
 (7) No plans at present to do any of these

17. Are you aware of the following services provided by the Economic Development Corporation of KCMO? [Check all that apply.]

- (1) Financing
- (2) Job/Investment Incentives
- (3) Redevelopment Incentives
- (4) Property tax abatement
- (5) Tax Increment Financing
- (6) Training funds
- (7) Regulatory aid
- (8) City service aid
- (9) Real estate aid

18. Please indicate if you are aware of and if you have used each of the following business assistance programs. Next, please rate your overall satisfaction with these programs using a scale of 1 to 5, where 5 means "Very Satisfied" and 1 means "Very Dissatisfied."

Business Assistance Programs	Are you aware of this program?		Have you used this program?		Very Satisfied	Satisfied	Neutral	Dissatisfied	Very Dissatisfied	Don't Know
	Yes	No	Yes	No						
1. Economic Development Corporation of KCMO	Yes	No	Yes	No	5	4	3	2	1	9
2. KC Bizcare	Yes	No	Yes	No	5	4	3	2	1	9
3. KCSOURCELINK	Yes	No	Yes	No	5	4	3	2	1	9
4. Justine Petersen Small Business Loans	Yes	No	Yes	No	5	4	3	2	1	9
5. Full Employment Council	Yes	No	Yes	No	5	4	3	2	1	9
6. Metropolitan Community College	Yes	No	Yes	No	5	4	3	2	1	9
7. Altcap	Yes	No	Yes	No	5	4	3	2	1	9

19. Does your company currently sell any products/services outside of the United States?

- (1) Yes
- (2) No
- (3) Not currently, but would like to

20. Which TWO of the following are your preferred methods of getting information about business assistance programs?

- (1) Email
- (2) Personal visit
- (3) Newsletter (mailed)
- (4) Newsletter (emailed)
- (5) Social media
- (6) EDC Website

21. Please indicate if you are interested in assistance in any of the following areas. [Check all that apply.]

- (1) Financial Assistance
- (2) Workforce training
- (3) Real estate development assistance
- (4) Government services/regulations
- (5) Exports
- (6) Other: _____

If you would like to discuss the survey, or have a need to be contacted by an Economic Development Corporation of Kansas City, Missouri representative on one of the above issues, please add your contact information below.

Your Name: _____ Telephone : _____
 Title: _____ Email: _____
 Company Name: _____

This concludes the survey. Thank you for your time!
 Please return your completed survey in the enclosed return-reply envelope addressed to:
 P.O. Box 480320, Kansas City, Missouri 64148-9902.

Your responses will remain completely confidential. The Information printed to the right will ONLY be used to help identify which areas of the City are having problems. If your address is not correct, please provide the correct information. Thank you.