



EXECUTIVE SUMMARY BISMARCK-MANDAN BUSINESS IMPACTS FROM COVID-19 April 1, 2020

A collaborative group of Bismarck-Mandan business organizations and government entities issued a joint survey March 26-31, 2020 to businesses in the area to gauge impacts of the COVID-19 pandemic. Partners invited businesses to complete the survey primarily through emails to members and stakeholders.

Survey partners:

- Bismarck Downtowners
- Bismarck Mandan Board of Realtors
- Bismarck Mandan Chamber EDC
- Bismarck Mandan Convention and Visitors Bureau
- Bismarck Mandan Home Builders Association
- Center for Technology and Business at the IDEA Center
- City of Bismarck
- City of Mandan Business Development and Communications Department
- Mandan Progress Organization

The survey received 436 responses with self-identification from 116 indicating a Bismarck location, 71 from Mandan, and 7 other. The remainder chose not to complete this section.

Aggregated Findings

The number of respondents to each question is indicated in parentheses.

- Current operating status (436) — 83% open; 16% closed
- Reason for closure (67) — 75% voluntary decision; 25% forced closure.
- Operating levels & supply chain (244) — Averages of 57% on-site operating level as compared to normal; 39% remote operating level; receiving 78% of goods and services purchased from vendors; able to sell, ship and/or deliver 73% of goods and services.
- Changes in employee counts (295) — 62% no change; 38% changed. Among those responding to the type of change (108), six reported new hires, 75 reported layoffs and 13 reported terminations.
- Payment for employees temporarily not reporting for work (250) — reported 47% of employees on average are being paid during the work hiatus; 48% are not.
- If employees are being paid, how many weeks they will be compensated (250) — 74% uncertain at this time; 1-2 weeks, 13%; 3-4 weeks, 5%; 5-6 weeks, 2%; 7-8 weeks, 2%; 9-10 weeks, 1%; 11-12 weeks, 1%; and more than 12 weeks, 2%.
- Provision of any temporary aid to unpaid employees during furlough (250) — 85% no; 18% yes. Examples included use of sick and annual leave, paid benefits, partial pay, gift cards and food.
- Remote work (249) — reported 27% of workforce is working remotely and 41% is unable to work remotely.

- Workforce morale (250) — With a 7 point range where 1=no confidence and 7=determined, the average rating was a 4.21.
- Employee concerns beyond general health (229) — Predominant themes included business ability to retain employees and make payroll, employee financial stability, potential loss of employees to other industries, ability of employees to work remotely, and mental health concerns.
- Weekly revenue (250) — 82% reported a decrease, 3% reported an increase, and 16% no change. Among those reporting an increase, most were in the less than 10% category. Reported decreased were almost equally distributed across all percentage ranges with the most, 18% in the category of 90-100%.
- Access to working capital (231) — 43% have a standing line of credit; 57% do not.
- Contact with bank (231) — 29% have contacted their lender about deferred payments, interest-only payments, a bridge loan or other financing; 45% have not; 25% indicated it is unnecessary.
- Interest in SBA disaster loan (229) — 69% are not interested; 31% are interested.
- Top concerns (220) — 67% decreasing consumer confidence/spending, 64% financing impact on operations and/or liquidity and capital, 55% global or U.S. recession, 43% employee stress, 21% supply chain disruptions, 17% lower productivity, 16% workforce reduction, 10% lack of information for decision-making and 3% impact on tax and trade issues.
- Business supports (208) — 51% indicated a buy local/support local campaign, 37% employee resources, 23% distribution of other employer best practices, 22% advocacy, 19% assistance referrals, and 7% technical assistance.

Partners in the survey will use findings to determine and prioritize services for area businesses, members and stakeholders. They will also share results with local, state and federal elected and appointed officials.