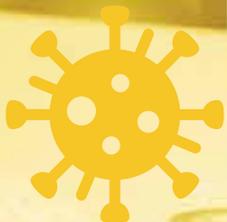


COVID-19 IMPACTS



The Labour Market Group administered a survey to several target groups.

IN MAY 2020

In May 2020, the Labour Market Group administered a survey to several target groups, which included an on-line link, targeted outreach to North Bay employers and to West Nipissing employers, as well as targeted outreach to employment service providers. In total, 238 respondents started the survey. The surveys were reviewed to ensure there were responses to the substantive questions which began after respondents were asked to identify the nature of their establishment. In the end, there were 208 responses which form the basis for this analysis.

PROFILE OF EMPLOYERS



Table 1 profiles the survey responses by industry. The table presents the actual number of survey responses by industry and the percentage share of the total survey population by industry to compare to the actual percentage distribution by industry of all establishments with employees in Nipissing and Parry Sound. Six respondents did not identify the industry to which they belonged.

TABLE 1: DISTRIBUTION OF SURVEY RESPONDENTS BY INDUSTRY

	SURVEY NUMBER	SURVEY PERCENT	ACTUAL PERCENT
Accommodation and Food Services	38	18.8%	8.3%
Administrative & Support, Waste Management	13	6.4%	3.9%
Agriculture, Forestry, Fishing and Hunting	1	0.5%	1.8%
Arts, Entertainment and Recreation	8	4.0%	2.6%
Construction	21	10.4%	17.8%
Educational Services	4	2.0%	1.1%
Finance and Insurance	4	2.0%	3.3%
Health Care and Social Assistance	22	10.9%	10.0%
Information and Cultural Industries	3	1.5%	1.9%
Manufacturing	22	10.9%	4.0%
Mining, Quarrying, and Oil and Gas Extraction	0	0.0%	0.4%
Other Services (except Public Administration)†	13	6.4%	8.9%
Professional, Scientific & Technical Services	9	4.5%	6.3%
Public Administration	1	0.5%	1.4%
Real Estate and Rental and Leasing	3	1.5%	5.3%
Retail Trade	33	16.3%	15.9%
Transportation and Warehousing	5	2.5%	3.7%
Utilities	1	0.5%	0.2%
Wholesale Trade	1	0.5%	2.8%
TOTAL	202	100%	99.4%

Actual distribution of Nipissing and Parry Sound employers from Statistics Canada, Canadian Business Counts, June 2020.

†Such as automotive repair, hairdressing or dry-cleaning services.

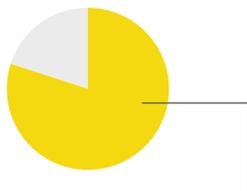
In most cases, the distribution by industry of survey respondents very closely matches the distribution by industry of local employers. The main differences are that the survey has a higher proportion of employers in both Accommodation & Food Services as well as Manufacturing, and a smaller proportion among Construction as well as Real Estate & Rental and Leasing, compared to the local industry profile.

TABLE 2: DISTRIBUTION OF SURVEY RESPONDENTS BY NUMBER OF EMPLOYEES

	NUMBER OF EMPLOYEES						
	0	1-4	5-9	10-19	20-49	50-99	100+
Survey	11%	20%	17%	17%	19%	7%	10%
Actual	64%	19%	8%	5%	3%	1%	1%

Respondents represented a range of firms by employee size. Compared to the actual distribution of establishments in Nipissing and Parry Sound by employee size, the survey sample was tilted as more heavily toward firms with employees and towards larger firms (Table 2).

Actual distribution of Nipissing and Parry Sound employers from Statistics Canada, Canadian Business Counts, June 2020.



Seven out of ten (72%) of the respondents were located in North Bay.



Other towns with a higher proportion of respondents included: Parry Sound (5%); Callander (3%); South River (3%); and Sturgeon Falls (3%).

OVERALL IMPACT OF COVID



Respondents were first asked to describe the nature of the losses they experienced as a result of COVID. Follow-up questions in the survey quantify these losses, but this initial question provided as opportunity for respondents to express the impact in their own words. This was an open-ended question and it is noteworthy that almost everyone (90%) wrote a response. Of those who replied, half (49%) cited lay-offs, ranging from a proportion to all of their staff. One out of five (19%) noted that their businesses closed completely, while a significant proportion had partial closures (dining room closed but take-out still operating; offices closed but employees still working from home; certain essential functions still operating but the main portion of the business closed to the general public). A handful of businesses were seasonal operations and they were not certain in May how things would pan out during the summer. A small proportion (4%) indicated that the pandemic had not affected their functions and 5% said the question was not applicable to them. Only one respondent out of the 189 who answered this question said that business had increased as a result of the pandemic.

A few comments illustrate the tone of many of the responses:

“Had to layoff 17 of 20 staff while we are closed (since March 15). Business has dropped by 80% on new orders and 95% on invoicing. Significant financial loss due to the timing of the pandemic.”

“There is a 90% reduction in sales revenue. Any revenues are used to pay rent, utilities, and goods. There is not enough revenue for wages.”

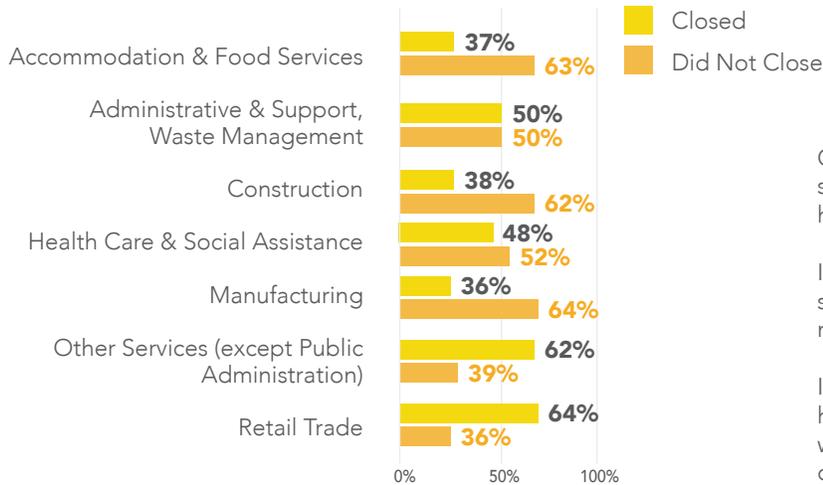
“Fluctuating numbers of layoffs, temporary closure of sales department, significant decrease in revenues due to COVID-19 safety concerns and economic uncertainty until after COVID has run its course.”

TEMPORARY CLOSURE



Respondents were asked if they had been forced to close their doors temporarily as a result of the COVID-19 pandemic. The responses were almost evenly split: 47% did close temporarily, 53% did not. Surprisingly, in many industries, there was a rough balance between those who closed and those who did not, as Table 3 demonstrates. (The table only lists those industries where there were at least 10 responses).

TABLE 3: PERCENTAGE OF BUSINESSES THAT TEMPORARILY CLOSED, BY INDUSTRY (MINIMUM 10 RESPONSES)



Of course, industries have their subsectors, and each of these would have had a different response to a lockdown.

In Retail Trade, for example, grocery stores were required to stay open, but non-essential retail stores were closed.

In Health Care and Social Assistance, hospitals and nursing homes stayed open, whereas various social services and child daycare centres closed.

OTHER MODIFICATIONS FOR BUSINESSES THAT TEMPORARILY CLOSED

Respondents were asked, in addition to having temporarily closed, what other modifications they may have put in place. Table 4 lists the percentage distribution of modifications taken by those respondents who had temporarily closed.

TABLE 4: OTHER MODIFICATIONS IMPLEMENTED BY BUSINESSES THAT HAD TEMPORARILY CLOSED



Percentages do not add up to 100% because respondents were able to select more than one response.

Employers had to adapt in a number of ways to ensure the continued operation of their organizations. These modifications run the gamut of adjustments. Only one-third did not make some modification.

A large majority (81%) of respondents indicate that they experience a loss of revenue.

RE-OPENING AFTER THE COVID-19 CRISIS PASSES



Respondents were canvassed about their views regarding re-opening after the crisis has passed. (Recall that this question was posed in May, before the further province-wide restrictions put in place during the seasonal holiday period.) Of the 95 respondents who closed temporarily, only three felt that they would not re-open after the pandemic had ended.

LOSS OF REVENUE



A large majority (81%) of respondents indicate that they experience a loss of revenue as a result of COVID-19. Respondents were also asked to estimate their loss as a percentage of their gross annual revenue. The average percentage loss was estimated at 50%.

There was general consistency in the estimated percentage revenue losses by industry, with larger losses expressed by Other Services (this would include personal services, such as hairdressers and barbers and nail salons, as well as auto repair shops), by Accommodation and Food Services and Administrative & Support (includes cleaning/janitorial firms, landscaping firms and temp employment agencies).

TABLE 5: PERCENTAGE ESTIMATED REVENUE LOSSES BY INDUSTRY

The average percentage loss was estimated at 50%.

	NUMBER	% LOSS
Accommodation & Food Services	34	62%
Administrative & Support, Waste Management	9	59%
Construction	17	48%
Health Care & Social Assistance	14	52%
Manufacturing	19	43%
Other Services (except Public Administration)	10	66%
Retail Trade	27	56%

To estimate the dollar figure which this loss represented, we applied the percentage loss to their gross annual revenue figure. Because respondents were given a range to choose from, we used the lowest end of the range, so that the dollar figure is the most conservative estimate. By this calculation, based on 109 respondents who provided both an estimate of their percentage loss and their gross annual revenue, the average dollar loss expressed by these establishments was at least \$571,888 (for the 13 firms with estimated revenues of under \$30,000, we applied an average revenue figure of \$15,000).

A caution regarding these figures: these losses were expressed in terms of annual revenue figures, whereas the time frame for the losses were for approximately two months (from the time the pandemic started until when the survey was administered). It may be more likely that respondents were expressing the percentage losses over this limited period. If these restricted conditions were to continue through the year, then one could extrapolate those losses to the entire year. Nevertheless, even for this period, the percentage figures represent substantial losses.

ABILITY TO WORK FROM HOME



Respondents were asked to estimate what percentage of their workforce could work from home. Table 6 shows the distribution of responses by percentage ranges of employees who could work from home. For a large share (66% -- two-thirds) of the establishments surveyed, only a very small portion (under 10%) of their workforce could work from home. For a minority of establishments (10%), almost all their employees could work from home.

TABLE 6: DISTRIBUTION OF RESPONDENTS BY SHARE OF EMPLOYEES WHO COULD WORK FROM HOME

PERCENT OF EMPLOYEES WHO COULD WORK FROM HOME	SHARE OF RESPONSES
Under 10%	66%
10% to 25%	14%
26% to 50%	9%
51% to 75%	2%
76% to 100%	10%

In the case of establishments in:



Accommodation and Food Services, 90% indicated that less than 10% of their workforce could work from home, compared to 70% of firms in Retail Trade.



In Health Care and Social Assistance, the responses coalesced at the two ends: 60% of establishments indicated that less than 10% of their workforce could work from home (likely health care services), while 30% said that 90% or more of their employees could work from home (likely social services).

LAYOFFS



Roughly six of ten (58%) of respondents had to lay off staff. The layoff rates were higher for some industries, but all industries were affected. Table 7 provides data for some of the industries with larger numbers of respondents. In this sample, the Manufacturing sector had the highest proportion of employers who had laid off staff, followed by Other Services and Accommodation & Food Services.

TABLE 7: PERCENT OF RESPONDENTS BY INDUSTRY WHO HAD TO LAY OFF EMPLOYEES

	YES	NO
ALL INDUSTRIES	58%	42%
Manufacturing	77%	23%
Other Services	69%	31%
Accommodation & Food Services	68%	32%
Health Care & Social Assistance	55%	45%
Retail Trade	53%	47%
Construction	52%	48%



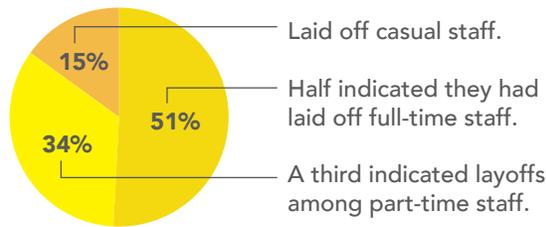
Table 8 illustrates the distribution of layoffs by the size of the firm. According to this data, it would appear that firms with 20-49 employees were more likely than others to lay off half or more of their staff.

TABLE 8: DISTRIBUTION OF NUMBER OF LAYOFFS BY SIZE OF FIRM

SIZE OF FIRM	NUMBER OF LAYOFFS					
	LESS THAN 5	6-10	11-20	21-50	51-99	100+
1-4	18	1				
5-9	17	8				
10-19	9	10	5			
20-49	5	3	9	11		
50-99	1	2	1	1	2	
100+	2	4	1	2	2	1

Layoffs were more likely to occur among full-time staff, although this is likely a reflection of more employees working full-time, compared to those working part-time or casual.

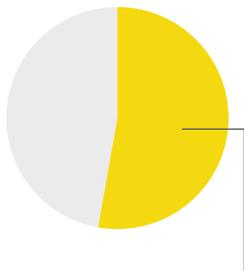
Among all respondents who indicated they laid off staff:



EMPLOYEES SELF-QUARANTINING

Respondents were asked the following question:

“What percentage of your current staff are still employed, but have chosen to go on leave due to ‘self-quarantining’ (i.e., choosing to stay home due to sickness/symptoms or if they are a high-risk individual)?”



Around half (53%) of respondents reported that no employees were self-quarantining.

Among the rest, most employers reported a very small proportion of employees self-quarantining (one-fifth saying that 1% to 9% of employees were self-quarantining). Out of 197 responses, five employers said that all their staff was self-quarantining (all five firms each had less than 20 employees).

Table 9 shows the distribution of responses by percentage range of employees self-quarantining.

TABLE 9: PERCENTAGE OF EMPLOYERS BY RANGE OF EMPLOYEES SELF-QUARANTINING

PERCENT OF EMPLOYEES SELF-QUARANTINING	PERCENT OF RESPONDENTS
0%	53%
1% to 9%	21%
10% to 49%	16%
50% to 99%	7%
100%	3%



OPERATING ON-LINE

Employers were asked whether they could fully or partially operate their business on-line.

Almost four in ten (38%) employers said they could fully or partially operate on-line. There were, not surprisingly, considerable variations by industry sector, from a high of 59% of businesses in Retail Trade to a low of 14% in Manufacturing.

There was no discernable pattern based on the size of the firm, except that firms with 5-9 employees were less likely to be able to work on-line. (Table 11)

TABLE 10: PERCENTAGE OF EMPLOYERS WHO COULD OPERATE FULLY OR PARTIALLY ON-LINE, SELECT INDUSTRIES



TABLE 11: PERCENTAGE OF EMPLOYERS WHO COULD OPERATE FULLY OR PARTIALLY ON-LINE, BY NUMBER OF EMPLOYEES

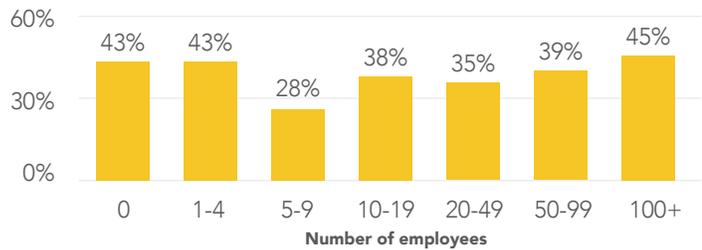
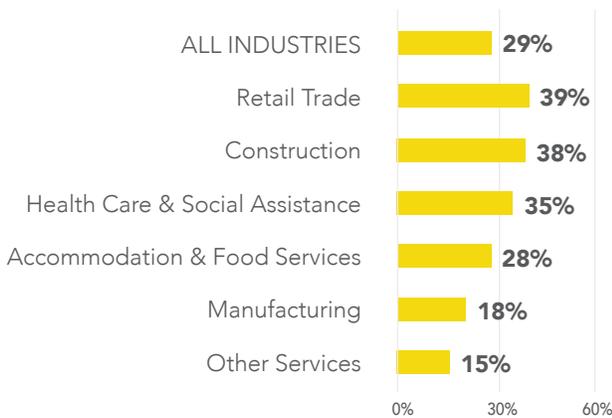


TABLE 12: PERCENTAGE OF EMPLOYERS WHO WERE HIRING IN MAY DESPITE COVID, BY SELECT INDUSTRIES



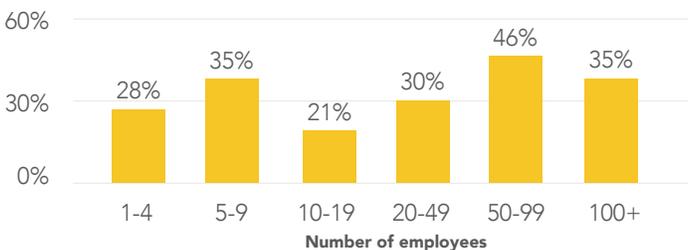
HIRING DURING COVID-19



The survey probed respondents whether, despite COVID, they were currently hiring (currently refers to the month of May). Slightly more than one quarter (28%) of employers indicated they were hiring. Table 12 shows the variations by select industries. While the Arts, Entertainment & Recreation had only seven responses, it is noteworthy that all seven said they were not hiring.

There is a slight tendency for larger firms to be more likely to be hiring during this time, although firms with 5-9 employees also were more inclined to hire. (Table 13)

TABLE 13: PERCENTAGE OF EMPLOYERS WHO WERE HIRING IN MAY DESPITE COVID, BY NUMBER OF EMPLOYEES



The occupations which employers were hiring for ran the gamut of jobs, from numerous entry-level and service jobs (labourers, cashiers, servers, cleaners, housekeeping, dishwashers, cooks, bartenders), to health care positions (personal support workers, registered practical nurses, registered nurses), skilled trades (carpenters, plumbers) and office and manager occupations (accounts receivable/payroll, branch manager). More than three-quarters (78%) indicated that they were having difficulty finding qualified individuals.

Respondents were asked: “What (if any) stimulus measures would be most effective during the recovery period?”

5

Respondents were provided an opportunity to suggest up to five measures.

IN TOTAL

155 respondents answered this question, providing 314 entries.

Of these suggestions, 19 related to “no comment,” “none” or some other response that did not involve a suggestion.

Many respondents provided more than one measure, so that the following breakdown by various suggestions can include a respondent proposing multiple measures.

Ninety-seven responses referred to some form of financial aid that did not involve a wage subsidy but referred to some way of providing assistance with some other operational expense. This included:

- **36** which sought some form of tax relief or deferral,
- **19** seeking help with rent,
- **14** seeking assistance or deferral for interest payments and
- **13** wishing help with cash flow.

84

Respondents specifically sought assistance with wages.



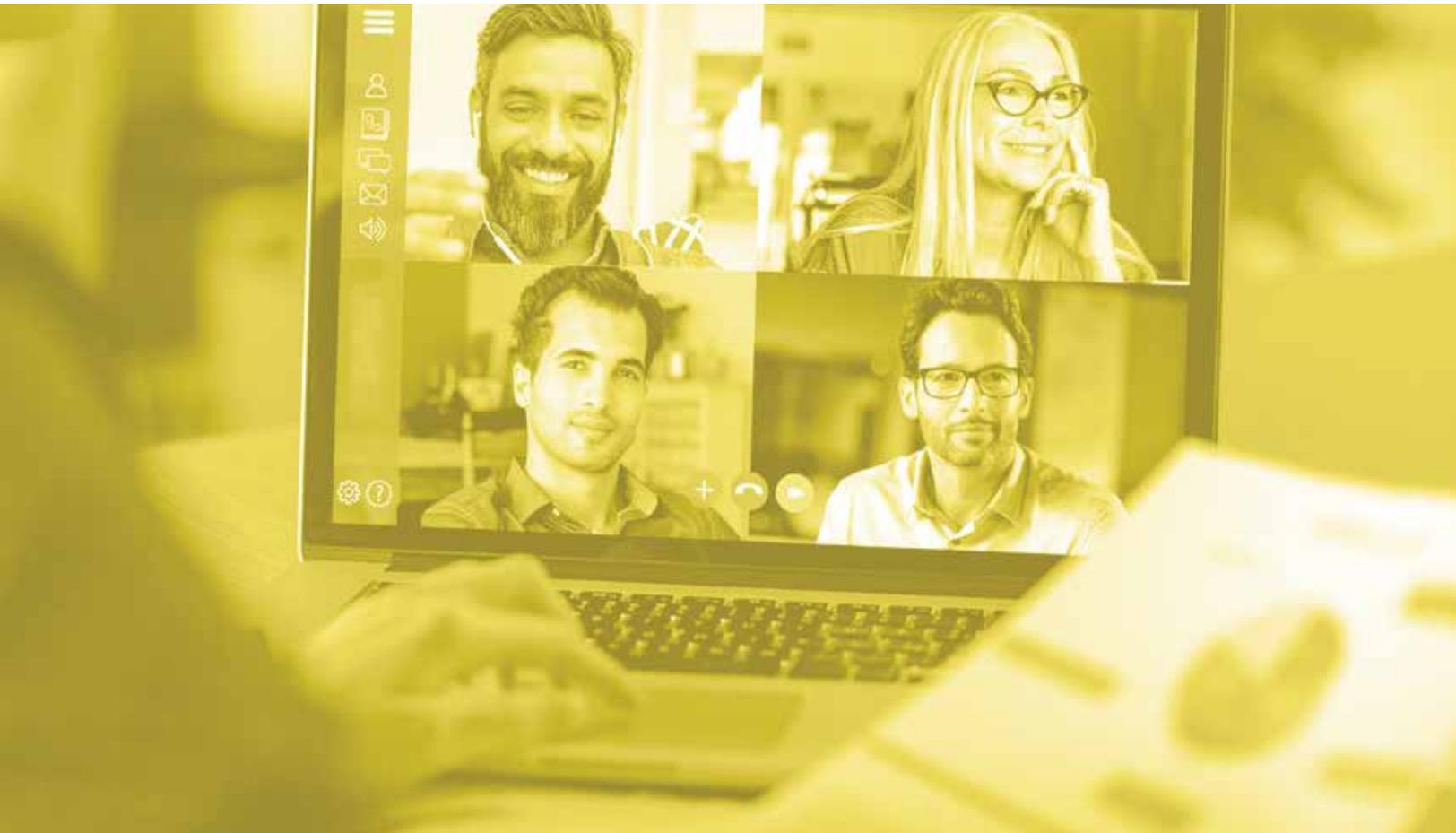
10

Identified the need to attract more visitors and customers.



9

Sought assistance with training.



MID-OCTOBER AND MID-NOVEMBER, 2020

Through mid-October and mid-November, 2020, the Labour Market Group surveyed employers a second time to assess how businesses were managing through the fall. In total, 74 employers participated in this survey, around two-thirds from Nipissing District and one-third from Parry Sound District. Slightly over 60% of the respondents were a corporation, 25% were self-employed, 6% were a not-for-profit organization and 3% were a partnership (the remainder declined to answer).

There was at least one employer from each industry category except for Information & Cultural Industries. Industries with at least five respondents each included: Manufacturing (9); Retail Trade (9); Construction (7); Health Care & Social Assistance (7); Accommodation & Food Services (6); Transportation & Warehousing (5); and Professional, Scientific & Technical Services (5).

IMPACT ON BUSINESS IN TERMS OF STAFFING

Chart 1 lists the ways in which the pandemic affected staffing on the part of survey respondents.

CHART 1: IMPACT ON BUSINESS IN TERMS OF STAFFING



Evidently, modifying health and safety protocols was the major consideration, but trouble hiring new job candidates and recalling employees also were prominent concerns.

IMPACT ON BUSINESS IN TERMS OF FINANCES

AROUND HALF OF RESPONDENTS AFFIRMED THE FOLLOWING IMPACTS ON THEIR BUSINESS FINANCES:	% OF RESPONDENTS
Decreased sales	53%
Restricted spending	51%
Increased expenses/overhead	47%
SECONDARY IMPACTS ON BUSINESS FINANCES INCLUDED:	% OF RESPONDENTS
Increased debt load	28%
Increased sales	19%

ITEMS WHICH ATTRACTED LESS AGREEMENT (UNDER 10%) INCLUDED:
Decreased expenses/overhead
Created new revenue stream(s)
No impact

IMPACT ON BUSINESS IN TERMS OF OPERATIONS

Respondents were asked to identify ways in which their business operations were impacted.

THE MOST PROMINENT IMPACT:	% OF RESPONDENTS
Increased cleaning/sanitation and or protection measures in office/facility	70%
SECOND TIER IMPACTS (AROUND ONE-THIRD OF RESPONDENTS):	% OF RESPONDENTS
Modified customer interaction (delivery, takeout, curbside, capacity limits, etc.)	39%
Supply chain interrupted	35%
Cancelled events	32%
THIRD-TIER IMPACTS (ONE-FIFTH TO ONE-QUARTER OF RESPONDENTS):	% OF RESPONDENTS
Reduced hours	26%
Clients have cancelled contracts with us	22%
Cancelled expansion/reno plans	20%

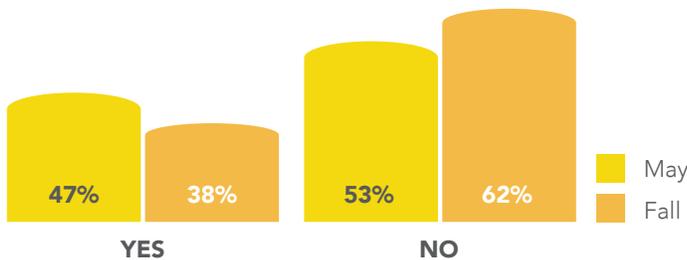
LESS FREQUENTLY CITED IMPACTS (UNDER 10% OF RESPONDENTS):
Re-tooled/retrofitted to offer new services/products
Increased hours
Filling more orders than this time last year
We have cancelled contracts with clients
Developed new partnerships with other businesses, non-profits/charities
Signed new contracts with government
Signed new contracts with other businesses
Telephone orders only
Excess perishable supplies
Online orders only

CLOSED TEMPORARILY AS OF MAY 1, 2020



A slightly smaller proportion of the respondents who replied in the fall had closed temporarily, compared to the sample who responded to the May survey (Chart 2).

CHART 2: DISTRIBUTION OF RESPONDENTS BY WHETHER THEY CLOSED TEMPORARILY



Of those that closed, 89% have since physically re-opened and none have closed their doors permanently.



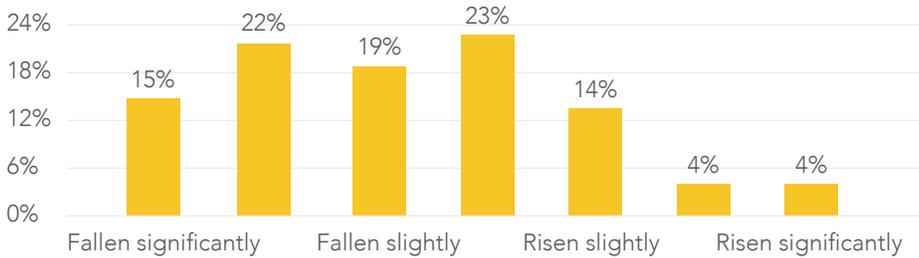
CHANGES TO THE BUSINESS



Several survey questions probed the ways in which businesses have changed.

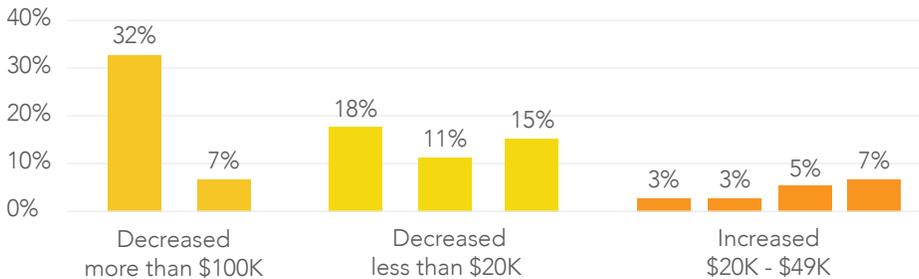
For the majority of respondents, their business equity has fallen (Chart 3) and two-thirds have experienced a decline in sales or income, with a third estimating the decline as \$100,000 or more (Chart 4).

CHART 3: CHANGE IN BUSINESS EQUITY DUE TO COVID-19



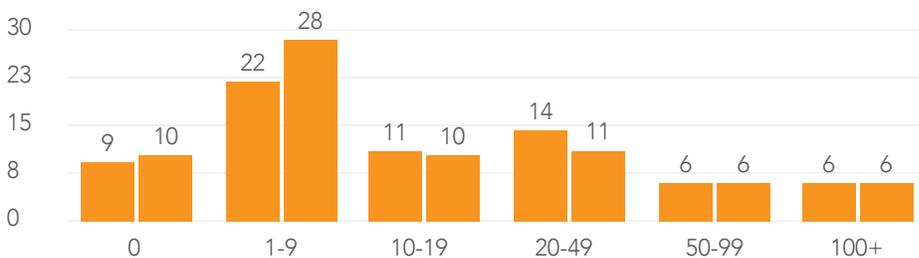
Only 14% of respondents said that their business had to be refitted or retooled to allow for new products or services.

CHART 4: CHANGE IN SALES OR INCOME DUE TO COVID-19



There has been a slight downward movement in the number of workers employed by the respondents when comparing employment before COVID-19 and on October 1 (Chart 5). There were 68 responses for the pre-COVID number and 71 for October 1, but the shift in employment is larger than the difference of three in the number of responses.

CHART 5: DISTRIBUTION OF RESPONDENTS BY EMPLOYEE SIZE RANGES, PRE-COVID-19 AND OCTOBER 1

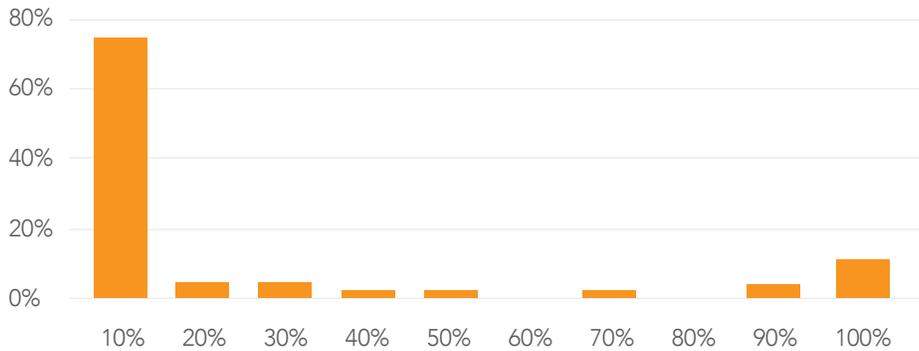


ABILITY TO WORK FROM HOME



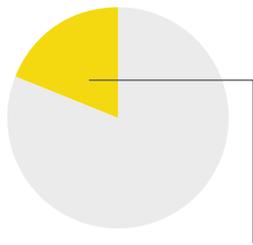
Three quarters (74%) of the respondents indicated that 10% or less of their workforce could work from home. This is similar to the result of the May survey, when 66% of respondents provided the same estimate. Statistics Canada projects that across the entire workforce, around 40% of workers could work from home, so these figures are considerably below the projected national estimate.

CHART 5: PERCENTAGE OF EMPLOYEES WHO COULD WORK FROM HOME



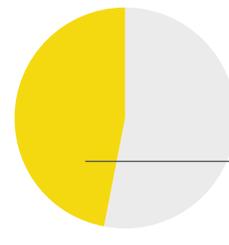
10% or less of their workforce could work from home.

EMPLOYEES SELF-QUARANTINING



Only one-fifth (19%)

Respondents were asked if they still had employed staff who had chosen to go on leave due to self-quarantine. Only one-fifth (19%) indicated that this was the case.



Almost half (47%)

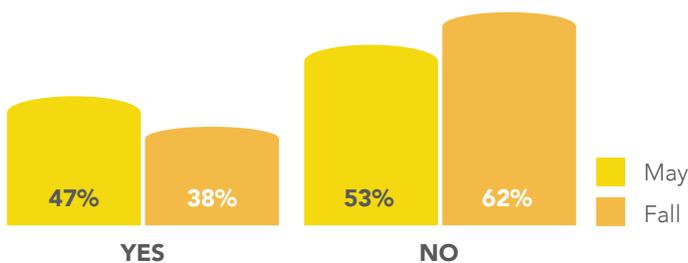
In May, when this question was asked, almost half (47%) had employees who were self-quarantining, although in most instances, these quarantining employees represented a small proportion of their workforce.

LAYOFFS



Fewer of the respondents in the Fall survey said that they had to layoff staff, compared to the responses to the May survey.

CHART 6: PERCENTAGE OF RESPONDENTS WHO LAID OFF EMPLOYEES AS A RESULT OF COVID-19



It is possible that the discrepancy in responses has to do with how the question was posed:

- **May survey:** Have you been forced to initiate layoffs as a direct result of COVID-19?
- **Fall survey:** Did you have to lay off employees following the release of the essential services list on March 26th, 2020?

TABLE 1: DISTRIBUTION OF LAYOFFS BY CATEGORY OF EMPLOYEE

	FULL-TIME	PART-TIME	SEASONAL	CONTRACT	CASUAL
Fall Survey	73%	21%	6%	1%	—
May Survey	51%	73%	—	—	15%

However, there also was somewhat of a discrepancy in the category of employees being laid off (Table 1).

The two surveys did not ask provide exactly the same employee categories, although that was less an issue than the difference between the distribution of layoffs between full-time and part-time employees.

Over 70% of the respondents to the Fall survey indicated that they had recalled their layoff employees. The employees being recalled were far more likely to be seasonal or contract employees as opposed to part-time or full-time employees. In particular, among the largest category, that of full-time employees, only seven in ten (71%) had been recalled at the time of the survey (Table 2).

TABLE 2: EMPLOYEES RECALLED BY CATEGORY

	NUMBER LAID OFF	NUMBER RECALLED	PERCENT RECALLED
Full-time	223	159	71%
Part-time	64	29	45%
Seasonal	17	26	153%
Contract	2	2	100%

Of the 20 employers who did recall workers, 12 employers (60%) indicated they had difficulties recalling them. When asked to elaborate on these difficulties, 15 employers responded, with several citing multiple reasons, as follows:

- Employees prefer to access CERB/CESB (12 respondents)
- Concern for the health and safety of themselves & their families (9 respondents)
- Lack of childcare (2 respondents)

HIRING



A significant portion of employers (38%) indicated that they have hired additional employees since the pandemic struck. Table 3 lists the number of employees hired and the number of employers involved. A small number of employers were responsible for a larger proportion of the hiring which took place.

TABLE 3: EMPLOYEES HIRED BY CATEGORY AND NUMBER OF EMPLOYERS HIRED

	NUMBER OF EMPLOYEES HIRED	NUMBER OF EMPLOYERS HIRED	COMMENT
Full-time	114	23	44 hires by 2 employers
Part-time	100	19	49 hires by 3 employers
Seasonal	17	3	15 hires by 1 employer

28% said they were currently (mid-October to mid-November) hiring. The occupations run the gamut of entry-level positions (cleaners, school bus drivers) to tradespersons (carpenters, welders, CNC machinist) to health sector workers (PSWs, RPNs).

For those who are hiring, 81% say they are having difficulty finding job candidates. There is a small sample (17 respondents) for questions about hiring, but among this group, the most frequent reasons provided for their recruiting difficulties were:

- Few suitable candidates (9 of the respondents)
- Competing with other employers (9)
- Finding people who want to work during a pandemic (8)
- Applicants lack technical skills (7)

MEASURES TO SUPPORT/PROTECT EMPLOYEES



Employers were asked what measures they have applied to support or protect their employees during the crisis.

THE TWO MOST PROMINENT MEASURES WERE:	%
Educated employees as to symptoms, risks, as well as prevention	78%
Implemented social distancing measures	77%
A SECOND TIER OF MEASURES IMPLEMENTED BY ALMOST HALF OF EMPLOYERS INCLUDED:	%
Informed employees of government assistance programs	45%
Made employees aware of mental health & wellbeing resources	43%
A SMALLER PROPORTION OF EMPLOYERS (ONE QUARTER OR LESS) USED THESE MEASURES:	%
Asked employees to work remotely	27%
Continue to pay wages to employees that are off work due to quarantine or illness	16%
Staggered work hours	15%
Asked employees to use vacation, sick, or personal days to defer layoffs	7%
Increased benefit programs	7%

GOVERNMENT SUPPORT PROGRAMS



Respondents were asked regarding their awareness of a specific list of government support programs, which spanned financial support, wage support, job programs and specific incentive programs. They were further asked which of these they had applied to and what was the status of their application. The full results are listed in Table 4. (They are listed in ascending order of those who did not apply.)



There is a wide discrepancy in the degree to which various programs are known to respondents, as well as a wide divergence in the level of uptake of the various programs.

Two support programs figure prominently among respondents (more applied than did not apply):

- Canada Emergency Business Account Loan – Up to \$40,000
- Canada Emergency Wage Subsidy (75%)

In addition, several other programs had some level of uptake (at least 10 applications from the 74 respondents):

- Temporary Wage Subsidy for Employers (10%)
- Canada Emergency Response Benefit (CERB)
- Canada Summer Jobs Program
- Canada Emergency Commercial Rent Assistance
- Regional Relief & Recovery Fund (via your local CFDC)

TABLE 4: KNOWLEDGE OF AND RELIANCE ON GOVERNMENT SUPPORT PROGRAMS

	AWARE OF	DID NOT APPLY	APPROVED	APPLIED	DENIED
Canada Emergency Business Account Loan – Up to \$40K	72%	28	30	5	3
Canada Emergency Wage Subsidy (75%)	73%	38	25	4	3
Temporary Wage Subsidy for Employers (10%)	49%	45	14	2	3
Canada Emergency Response Benefit (CERB)	77%	47	11	3	3
Canada Summer Jobs Program	35%	51	8	3	0
Canada Emergency Commercial Rent Assistance	43%	52	8	1	1
Regional Relief & Recovery Fund (via your local CFDC)	24%	53	4	4	2
Business Credit Availability Program	15%	57	1	1	2
Deferral of HST, income tax, and/or tax filing extensions	54%	59	4	3	0
Work Sharing Program	22%	59	2	0	0
Entrepreneurial Support Programs	7%	59	1	1	0
Regional Opportunities Investment Tax Credit	5%	60	1	0	0
Industrial Research Assistance Program	5%	60	1	0	0
Large Employer Emergency Financing Facility Program	5%	60	1	0	0
Insured Mortgage Purchase Program	4%	60	1	0	0

Applied means that the outcome is not yet known

Employers were asked the reasons why they might not have applied to a support program, which varied as follows:



Among the “Other” responses were such reasons as: did not know why; unsure about applicability; did not wish to go into further debt.

WHAT IF SCENARIOS

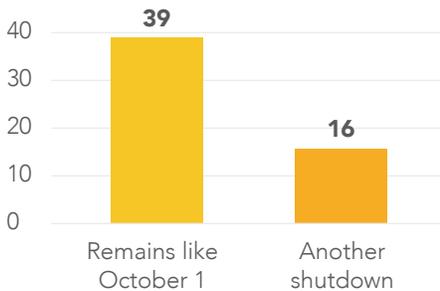
The survey asked respondents to indicate what their actions might be, in the case of two “*what if*” possibilities, as follows:

- If the situation remains as it was on October 1
- If a second wave results in another shutdown

Each of the following charts illustrates the responses, based on the number of replies (there were a variable number of replies for each circumstance and for comparison’s sake it make more sense to listen how many respondents responded according to each situation).

Employers are far more likely to increase services if there is increased demand if circumstances are much as they were on October 1, but are less likely to consider that option if there is a second wave shutdown (Chart 7).

CHART 7: EXPANDING SERVICES TO MEET INCREASED DEMAND



Employers are less likely to recall laid-off employees under either scenario, likely because many have already recalled these workers (Chart 8).

On the other hand, employers are more likely to consider hiring new employees if things remain as they were on October 1 (Chart 9). Their responses to this question are very similar to their response to expanding services where demand increases (Chart 7).

The next questions asked about different variations of opening, as follows:

- Continue full-time operations with required safety measures in place
- Continue part-time operations with required safety measures in place
- Continue full-time operations remotely
- Continue part-time operations remotely

Chart 10 shows the responses if conditions remain as on October 1, and illustrates the answers where a second wave results in another shutdown.

Employers are far more likely to consider in-person operations, more likely full-time, where circumstances are like they were on October 1. A second shutdown would result in a larger number selecting remote operations, more or less split between part-time and full-time hours.

CHART 8: RECALLING LAID OFF EMPLOYEES

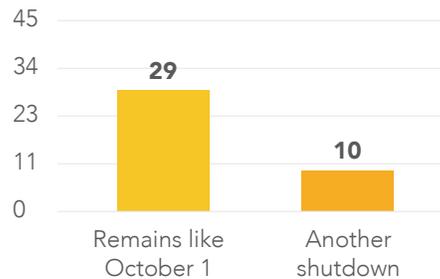


CHART 9: HIRING FOR NEW POSITIONS

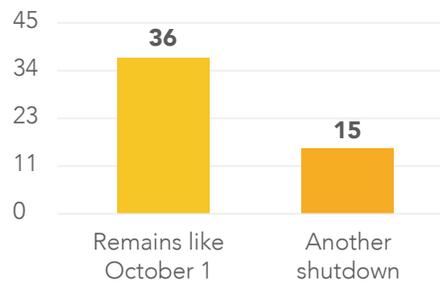
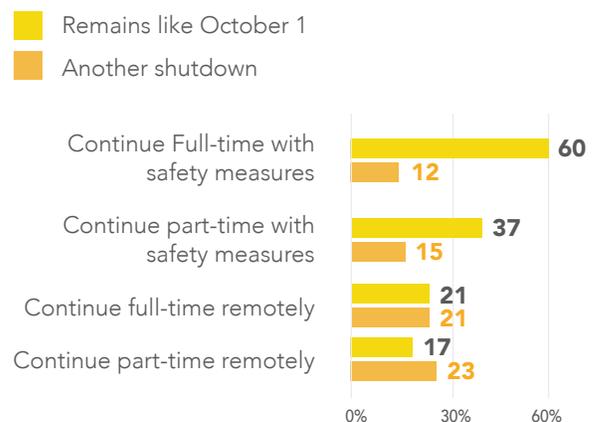


CHART 10: NATURE OF BUSINESS OPENING IF THE SITUATION REMAINS AS IT WAS ON OCTOBER 1, AND IF A SECOND WAVE RESULTS IN ANOTHER SHUTDOWN





Charts 11 and 12 compared the impact of an increase or a decrease in business on the size of one's workforce. A decrease in business in the case of a shutdown would appear to cause more employers to reduce their workforce than the number of employers projecting an increase in their workforce caused by an increase in business.

CHART 11: REDUCED WORKFORCE DUE TO DECREASE IN BUSINESS

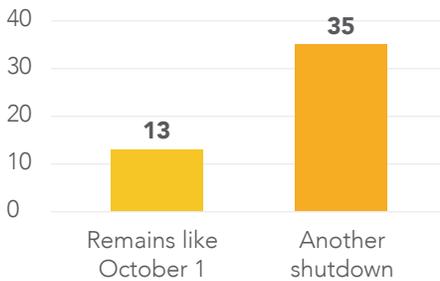
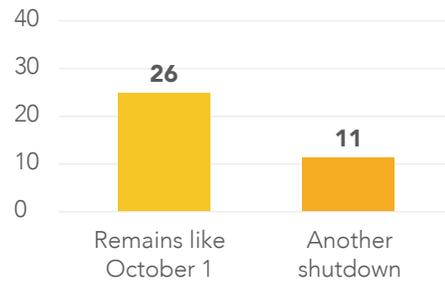


CHART 12: INCREASED WORKFORCE DUE TO INCREASE IN BUSINESS



The last two charts probe the likelihood of temporary and permanent closures of the business.

Should there be another shutdown, it is expected that non-essential businesses would close temporarily, and so the results in Chart 13 are not so surprising. What is more surprising is that under the conditions of October 1 that five firms indicated they would be closed temporarily.

The responses from Chart 14 are more concerning. Even under the conditions of October 1, six firms indicated they would be likely to close permanently, whereas if a second shutdown occurred, 21 firms state they would shut down permanently as a result. The entire survey consisted of 74 respondents, so this number represents a considerable proportion of this sample size.

CHART 13: LIKELIHOOD OF CLOSING TEMPORARILY

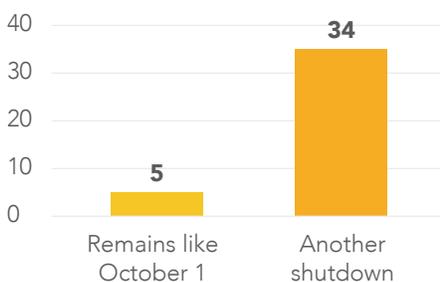
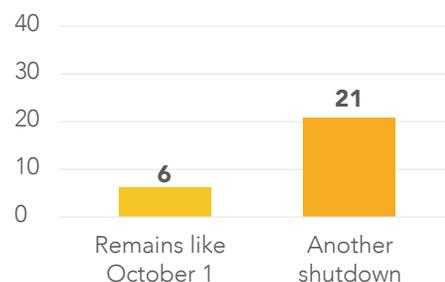


CHART 14: LIKELIHOOD OF CLOSING PERMANENTLY



SUPPORT TO MOVE TO ECONOMIC RECOVERY

Respondents were asked to suggest what resources or assistance they felt was needed to support economic recovery, if things stayed much as they were as on October 1. In most instances, the suggestions referred to various forms of financial assistance, including help with fixed expenses (such as rent) and/or wage subsidies. Several made the point that the assistance should be in the form of grants, not loans, or if loans, then interest-free or forgivable. The point was also made that this assistance would need to be in place for the medium-term. A few asked that the application process for assistance be made easier.

Among items which did not involve direct financial assistance to businesses, the following suggestions emerged:

- Improved access to reliable and high-speed Internet services
- Improved access to liability insurance
- Avoid further shutdowns.

When asked about support from different levels of government, many respondents reiterated the call for continuing financial assistance. In addition, the following items were identified by more than one respondents that were relevant initiatives by various levels of government:

LOCAL	PROVINCIAL	FEDERAL
Support local business/local tourism campaigns	Ensure that a regional perspective is taken into consideration when it comes to shutdown strategies	Almost all suggestions directed to the federal government related to financial assistance
Reduction/deferral of property tax/utility bills		
Improved access to Internet, to tech equipment and to tech support		