



Office of the Regional Chair | Jim Bradley

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June 23, 2020

Re: Niagara COVID-19 Business Impact Survey Report – Part 2

In early April, Niagara's Economic Rapid Response Team (ERRT) shared the results of Part 1 of the Niagara COVID-19 Business Impact Survey. This survey was intended to better understand the initial effect and future projections the mandated closure of businesses resulting from the COVID-19 had on the local economy. The survey was a collaborative effort by all the regional economic development offices and led by Niagara Region Economic Development.

The second phase of the COVID-19 Business Impact Survey commenced on May 15, 2020. Niagara area businesses received a follow-up survey as a means for the ERRT to understand the impact COVID-19 has had on the regional economy and inform Niagara's recovery plan.

Together with the support of additional economic development partners, including Niagara's chambers of commerce, the survey data contained in the enclosed report identifies the gaps in the federal and provincial funding as well as initiatives that have been very successful and would benefit businesses with their continuation. This information illustrates the sectors most affected by the physical distancing restrictions and can advise public policy in determining the appropriate guidelines that can be reasonably implemented for businesses.

Key highlights contained in the Part 2 Survey Results include:

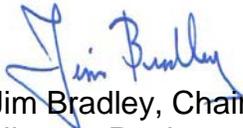
- 1,103 businesses accessed the various federal/provincial relief programs, while 229 respondents had not accessed any programs at all
- The most popular government programs were the Canada Emergency Wage Subside, Canada Emergency Business, and the Canada Emergency Response Benefit
- Estimated total lost revenue is \$7.8 billion across the economy, which can be largely attributed to Niagara's higher concentration of tourism-oriented industry sectors
- Jobs losses are expected to be significantly higher than what was reported in the Labour Force Survey (35,200+)
- Many businesses are not able to meet their monthly financial obligations
 - 36% reported the ability to only pay up to 50 percent of fixed expenses, i.e. rent, insurance, payroll, etc., and 22% reported only being able to cover up to 25% of fixed expenses
- 35% of businesses surveyed reported they are either at risk of permanent closure or vulnerable to closure, which disproportionately affects accommodation and food services; arts, entertainment and recreation, retail trade, and other personal services

With the collection of this valuable data, community stakeholders and all orders of government can ensure Niagara's business interests are included in any future recovery measures. To meet the needs of local businesses, at least \$35 million in large capital investments will be

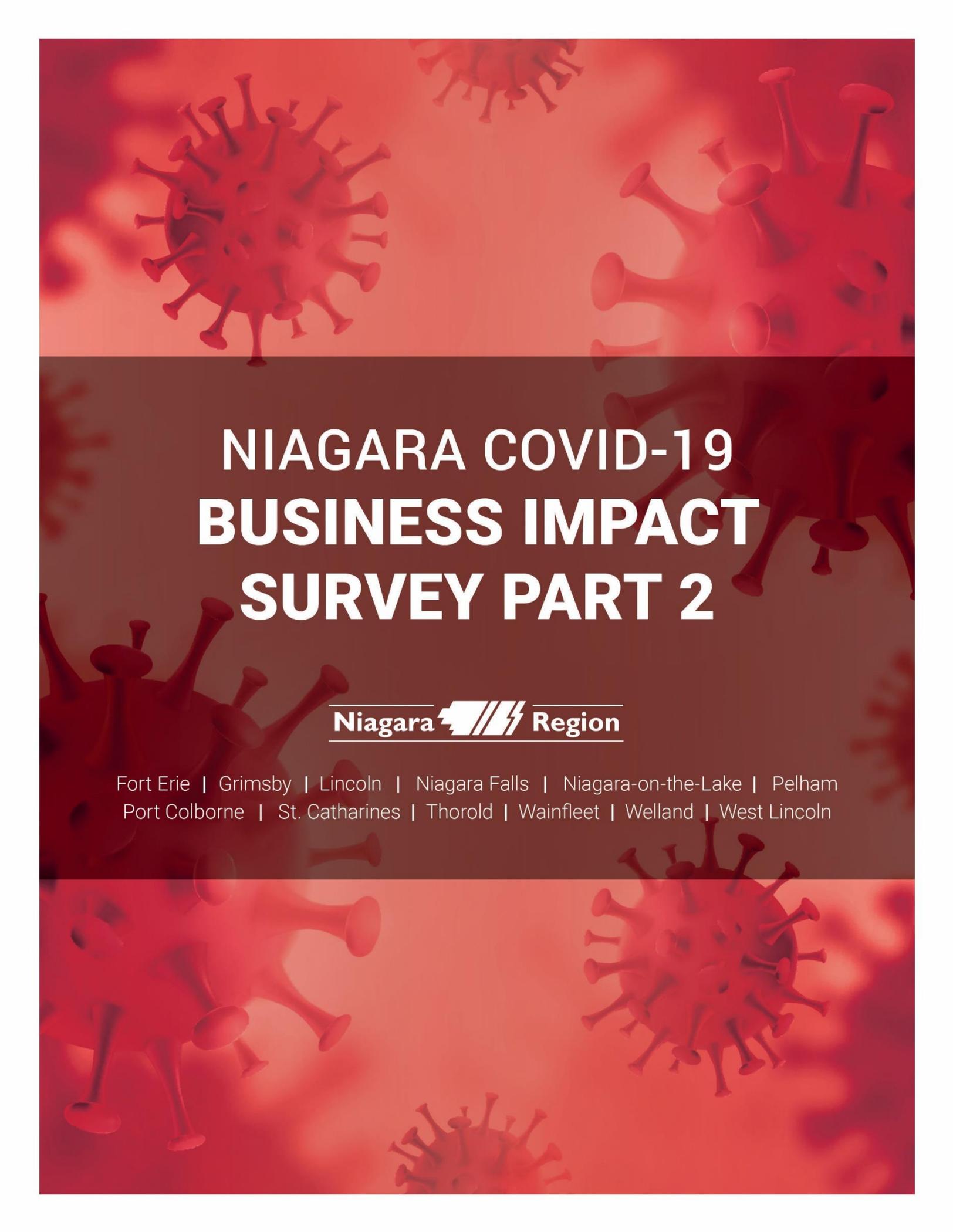
required for businesses to operate under COVID-19 precautionary measures. The data also offers some insight into what other tools can be developed to assist businesses in repurposing or transforming business models in order to adapt to the new way of conducting business in the post-COVID era. These supports will enable Niagara's economy to continue to thrive. Additional financial investments that reflect the needs of businesses will provide the foundation to boost job growth and reinvigorate Niagara's hospitality and tourism sector so that we can continue to be a keystone tourist destination in Ontario.

We look forward to collaborating with government representatives and community stakeholders in rebuilding Niagara's economy in the post-COVID period. For more information regarding the methodology or survey results, I welcome you to contact the Regional Chair's Office at 905-980-6000 ext. 3341.

Sincerely,



Jim Bradley, Chair
Niagara Region

The background of the entire page is a deep red color, overlaid with several 3D rendered virus particles. These particles are spherical with numerous protruding spikes, resembling coronaviruses. They are scattered across the page, with some appearing larger and more detailed than others, creating a sense of depth and movement.

NIAGARA COVID-19 BUSINESS IMPACT SURVEY PART 2

Niagara  Region

Fort Erie | Grimsby | Lincoln | Niagara Falls | Niagara-on-the-Lake | Pelham
Port Colborne | St. Catharines | Thorold | Wainfleet | Welland | West Lincoln

Introduction

COVID-19 has had a major impact on the lives and well-being of most people worldwide. This impact has certainly been felt in Niagara by both residents and the thousands of businesses that are the engine of the regional economy of Niagara.

Before the onset of COVID-19, Niagara was experiencing significant economic gains. By the end of 2019, the region had experienced the lowest unemployment rate in 20 years at 4.7 percent. Investment in new building construction was the highest it has ever been at \$2.4 billion. Export values were at an all time high of \$4.7 billion. Tourism expenditures were also reaching record levels at \$2.4 billion. The start of 2020 continued this momentum with the regional economy showing signs of strength and growth potential. However, COVID-19 abruptly stunted this economic progress; not just for Niagara, but for the entire global economy.

This Niagara COVID-19 Business Impact Survey – Part 2 is a collaborative effort of the Niagara Economic Rapid Response Team (ERRT), with an integrated and proactive focus on addressing the business and economic impacts of COVID-19, as well as planning the best steps for economic recovery. The ERRT was formed by the Niagara Regional Chair along with the mayors of Niagara's 12 municipalities: Fort Erie, Grimsby, Lincoln, Niagara Falls, Niagara-on-the-Lake, Pelham, Port Colborne, St. Catharines, Thorold, Wainfleet, Welland, and West Lincoln.

The survey results provide insights into the depth and breadth of the impact that COVID-19 has had on the Niagara economy. It is significant and challenging with no real precedent in the history of the region. The Great Recession in 2008 eroded underpinnings of the global economy, but this time it is expected that Niagara is in a position to bounce back quicker provided the spread of COVID-19 can be contained.

The ERRT is working together along with stakeholders in the business community to ensure that Niagara gets back to business as soon as possible, and as responsibly as possible.

Methodology

The Niagara COVID-19 Business Impact Survey – Part 2 was distributed to approximately 10,000 businesses from May 15 until June 1, 2020, mainly through direct email.

The economic development departments of the Town of Fort Erie, Town of Lincoln, City of Niagara Falls, City of St. Catharines, City of Port Colborne, and the City of Welland contacted the businesses in those respective municipalities while Niagara Region contacted businesses in the municipalities without economic development offices at the time, which included Wainfleet, Pelham, West Lincoln, Grimsby, Thorold, and Niagara-on-the-Lake.

Additional channels were used to promote the survey to Niagara businesses including Niagara-based chambers of commerce, various business and industry associations, as well as social media channels including LinkedIn, Facebook and Twitter.

The survey was intended only for businesses that operate in Niagara and non-Niagara businesses were removed from the data results.

Of the approximately 10,000 businesses that were contacted directly and reached through promotional channels, 1,382 businesses completed the survey for an approximate response rate of 13%.

Whereas the first Niagara COVID-19 Business Impact Survey focused specifically on the economic impact of COVID-19 as the crisis unfolded, the second survey focused on the continued economic impact of COVID-19, as well as business status, support measures, and details specific to business and economic recovery.

A copy of the survey instrument is included as an appendix.

The “n” figure on the graphs below refers to the number of responses to each part of the survey. Some sections will have more responses than total survey respondents due to the ability to select multiple answers on some questions.

Analysis

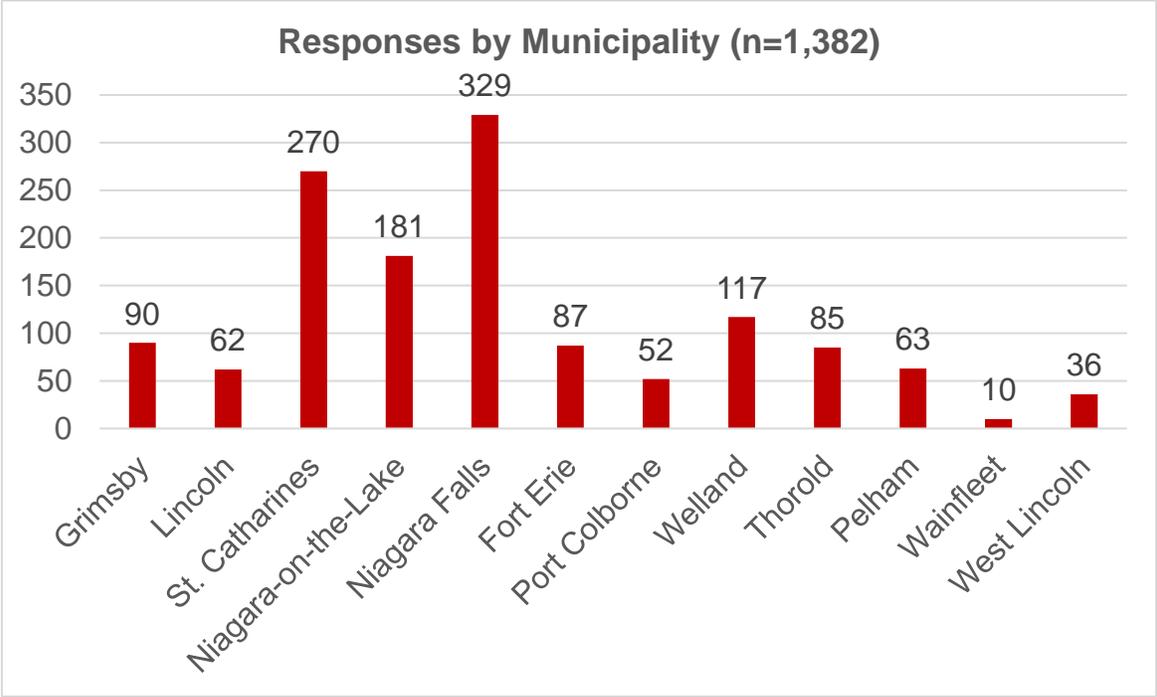
The following section provides a detailed analysis of the results from each question of the survey. The section is segmented into five sections:

- Respondents: This section provides information on the business that completed the survey.
- Employment: This section provide information on the effects of COVID-19 on employment and staffing.
- Revenue and Expenses: This section provides information on revenue loss, anticipate revenue loss, ability to pay, and added expenses.
- Business Status: This section provide information on the current situation of the businesses surveyed.
- Recovery: This section provides information on business recovery measures and related issues.

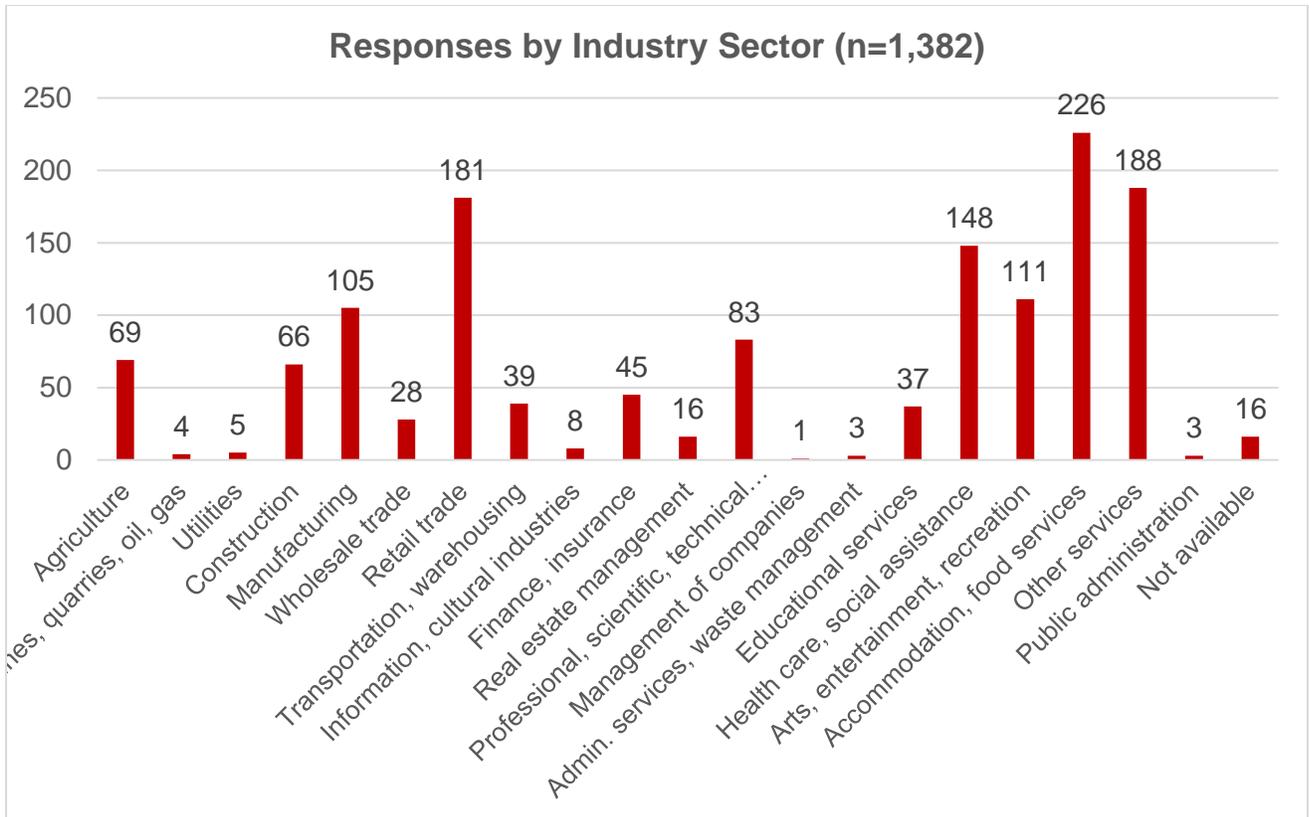
The respondents section provides information on the businesses that completed the survey. The employment section provides information on the effects of COVID-19 on employment and staffing. The revenue and expenses section provides information on lost revenue, the ability to pay, and added expenses. The business status section provides information on the current situation of businesses surveyed, and the recovery section provides information on business recovery measures and related issues to re-opening.

Respondents

The following section provides information on the number of business respondents by municipality, and the number of respondents by industry sector using the North American Industry Classification System (NAICS).



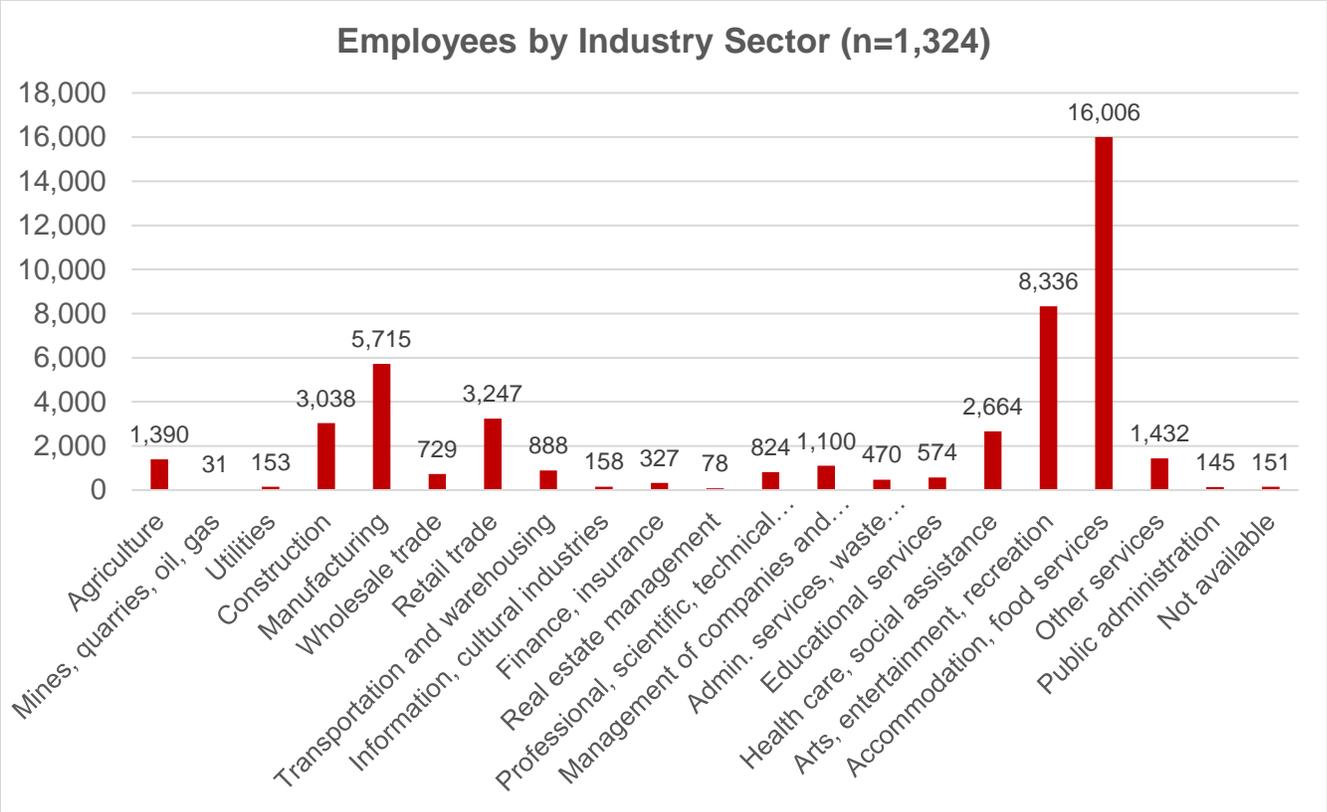
- Respondents selected the municipality in Niagara where their businesses have a physical presence. 1,382 businesses completed the survey with respondents from each Niagara municipality.



- Businesses self-identified the industry sector that best reflects their business activities. Responses were strong across the industry sectors that are most prevalent in Niagara.
- Responses were notably strong across industry sectors including accommodation and food services; other services; retail trade; health care and social assistance; and, arts, entertainment and recreation.

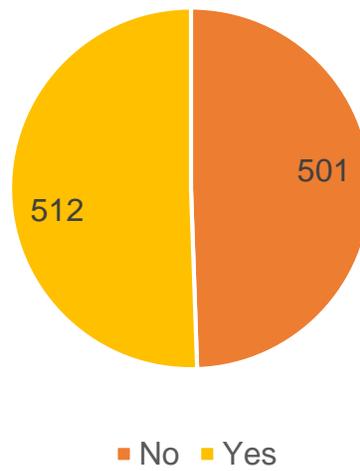
Employment

The following section provides employment and staffing characteristics of the respondent businesses. The information provided includes employees represented by industry sector, staff layoffs, and staff layoffs by employment type, total layoffs by industry sector, anticipated future layoffs, and anticipated future layoffs by industry sector.



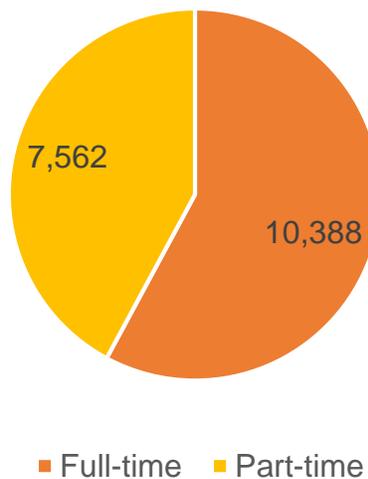
- Respondents were asked to identify the number of employees employed in their establishment. 1,324 respondents reported employing 47,456 staff.
- The industry sectors where respondents reported the highest number of employees included accommodation and food services (16,006); arts, entertainment and recreation (8,336); manufacturing (5,715); retail trade (3,247); and, health care and social assistance (2,664).

Staff Layoffs Since April 1, 2020 (n=1,013)

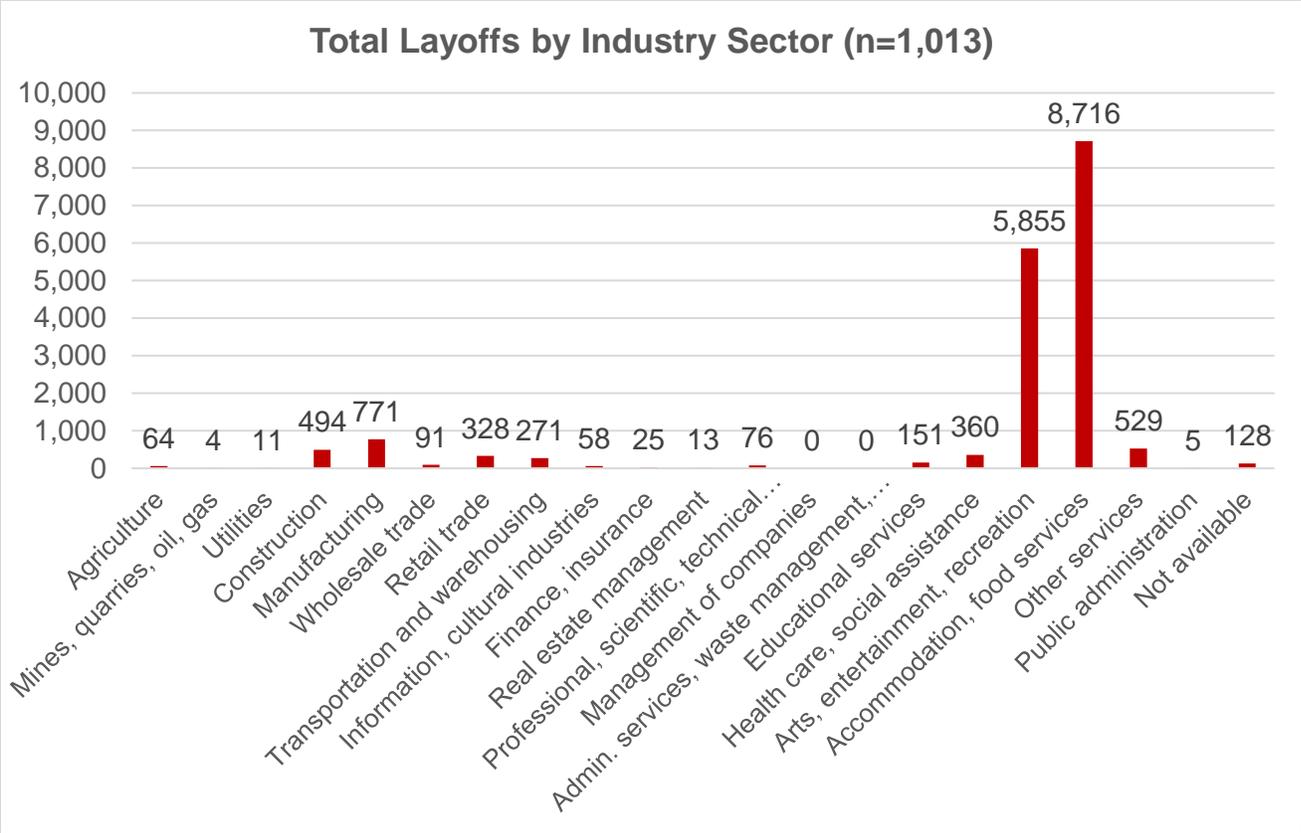


- 512 (51%) respondents reported that they laid off staff, while 501 (49%) had not laid off any staff.

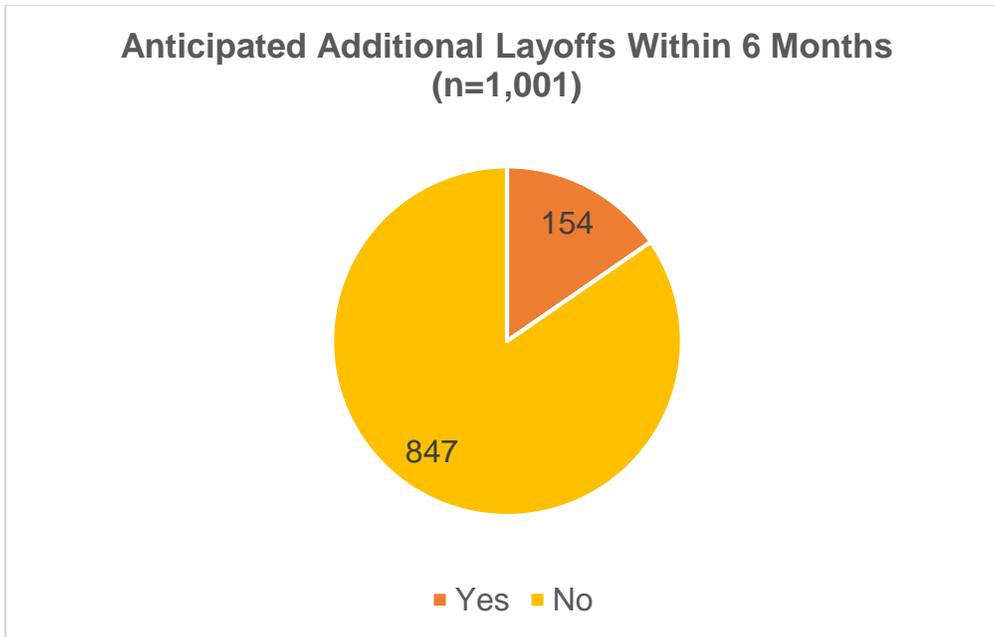
Staff Layoffs by Employment Type (n=1,013)



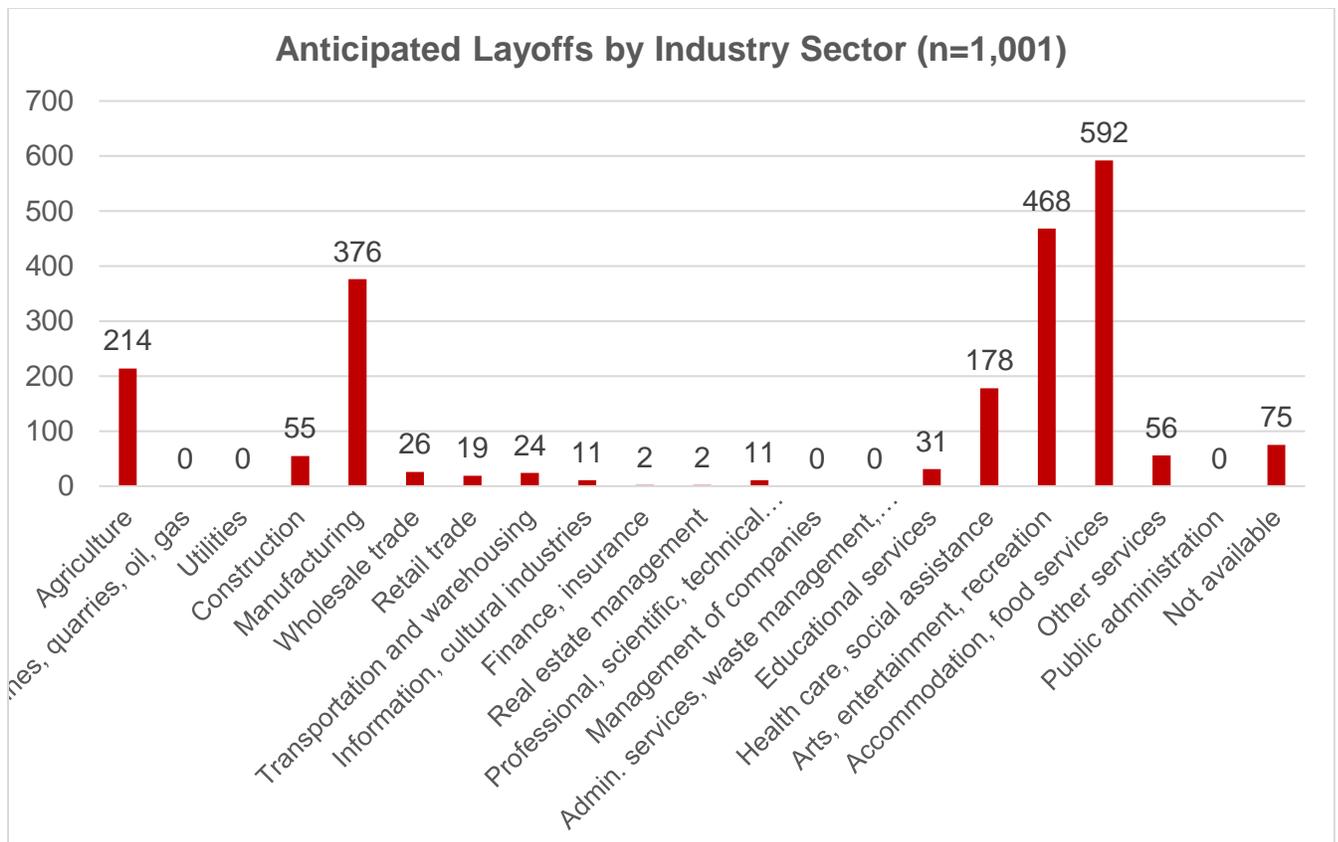
- Respondents reported total layoffs of 17,950 staff across industry sectors. 10,388 (58%) were full-time staff and 7,562 (42%) were part-time staff.



- Total staff layoffs were disproportionate by industry sector. Although accommodation and food services; and, arts, entertainment and recreation had the highest number of responses, the number of staff layoffs were exponentially higher than the other sectors.
- Manufacturing also reported a high number of layoffs, but it is important to note that food and beverage manufacturing businesses such as wineries and some food processing experienced significant layoffs.
- The other services sector also experienced a high number of layoffs. Many of the businesses in this sector include salons, personal services, repair services, funeral homes, pet care, civic and social organizations, etc.



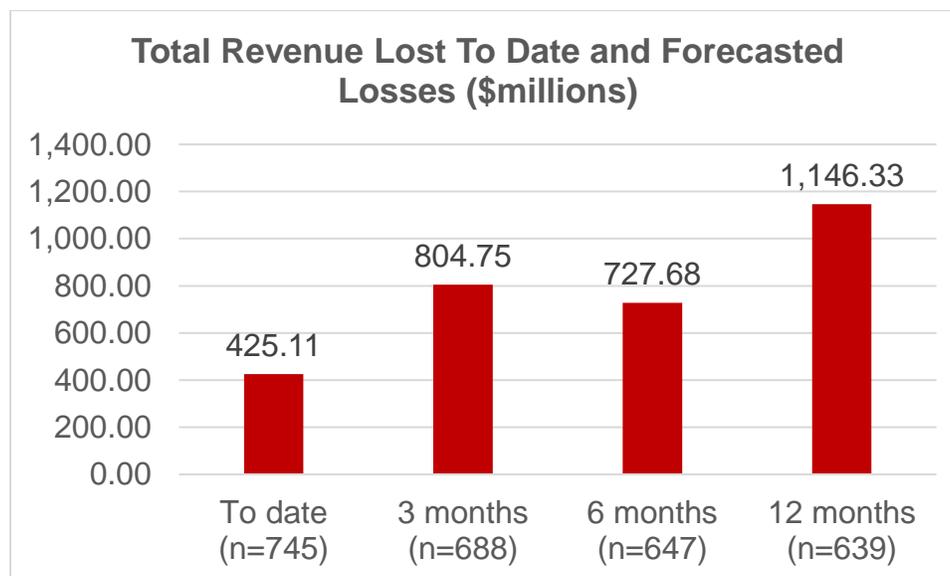
- Most respondents (85%) did not anticipate further staff layoffs within the next 6 months, while 15% indicated they would be making additional lay-offs. This would be contingent on measures implemented to open parts of the economy.



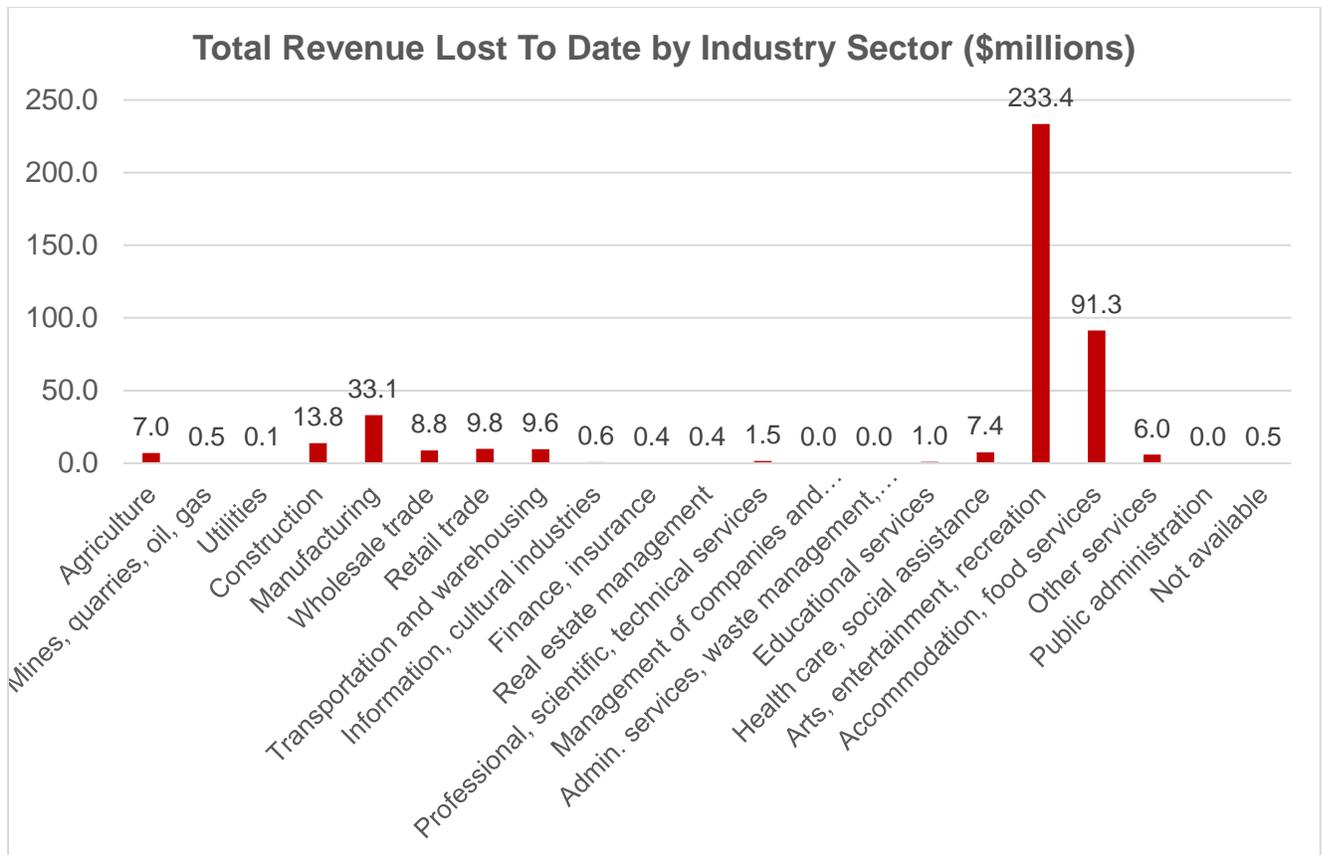
- The business in industry sectors that reported the most layoffs are also those that report the most number of anticipated layoffs. Accommodation and food services, and arts, entertainment and recreation report the highest number of anticipated layoffs.
- It is surprising to see that manufacturing reported such a high number of anticipated layoffs, but this could be a result of global supply chain challenges, as well as effects on food and beverage manufacturing sectors, particularly the wine industry since there is a hospitality component to those businesses.

Revenue and Expenses

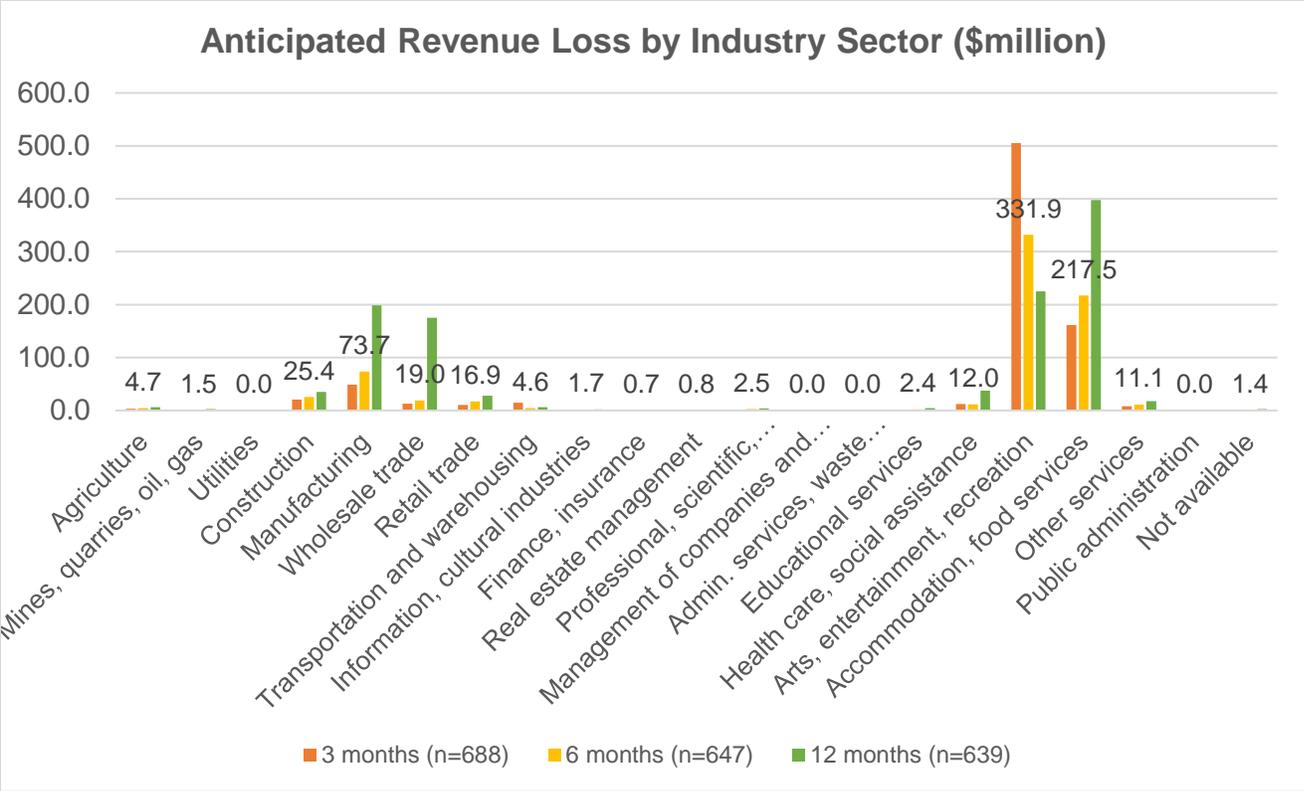
The following section provides information specific to current and forecasted lost revenue, current and forecasted lost revenue by industry sector, and the ability for businesses to pay fixed expenses.



- Businesses have reported a staggering loss of revenue since the start of COVID-19. 745 respondents reported a combined loss of \$425.11 million.
- In regards to anticipated losses, 688 businesses anticipated a loss of \$804.75 million within 3 months, 647 business anticipate a loss of \$727.68 million in 6 months, and 639 businesses reported anticipate losses of \$1.146 billion within 12 months.
- Respondents represent only 5% of businesses in Niagara, so existing and anticipated losses would be in the multi-billions of dollars across the regional economy.

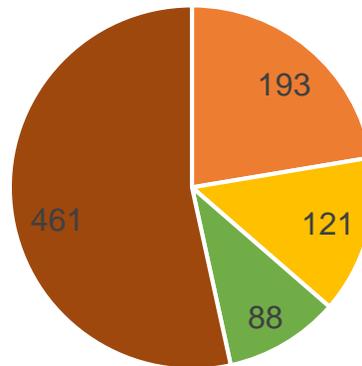


- It is apparent some industry sectors were affected disproportionately. Arts, entertainment and recreation (111 respondents) reported an estimated loss of \$233.4 million; accommodation and food services (226 respondents) reported an estimated loss of \$91.3 million; and, manufacturing (105 respondents) reported an estimated loss of \$33.1 million.
- The sectors that reported the smallest revenue losses include management of companies and enterprises; utilities; administration, waste management and remediation; mines, quarries, oil and gas extraction; finance and insurance; real estate management; and, information and cultural industries.



- The sectors that anticipated the largest ongoing loss of revenue included accommodation and food services at \$397.4 million over 12 months; arts, entertainment and recreation at \$225.1 million over 12 months; manufacturing at \$198.5 million over 12 months; and, wholesale trade at \$175.4 million over 12 months.

Percentage of Fixed Expenses Businesses Can Currently Pay (n=863)

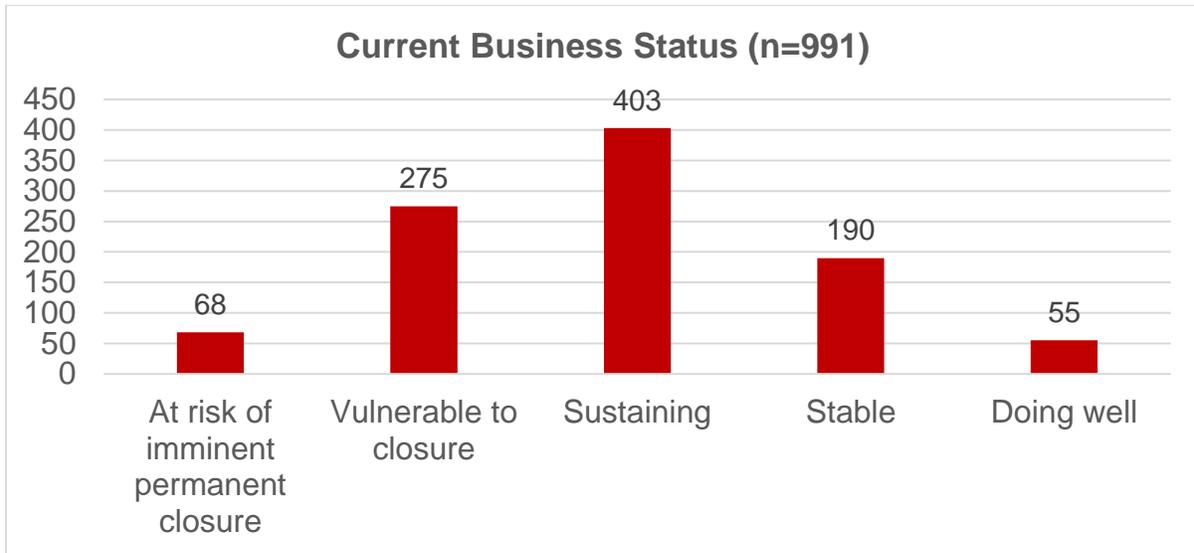


■ 1 to 25 percent ■ 26 to 50 percent
■ 51 to 75 percent ■ 76 to 100 percent

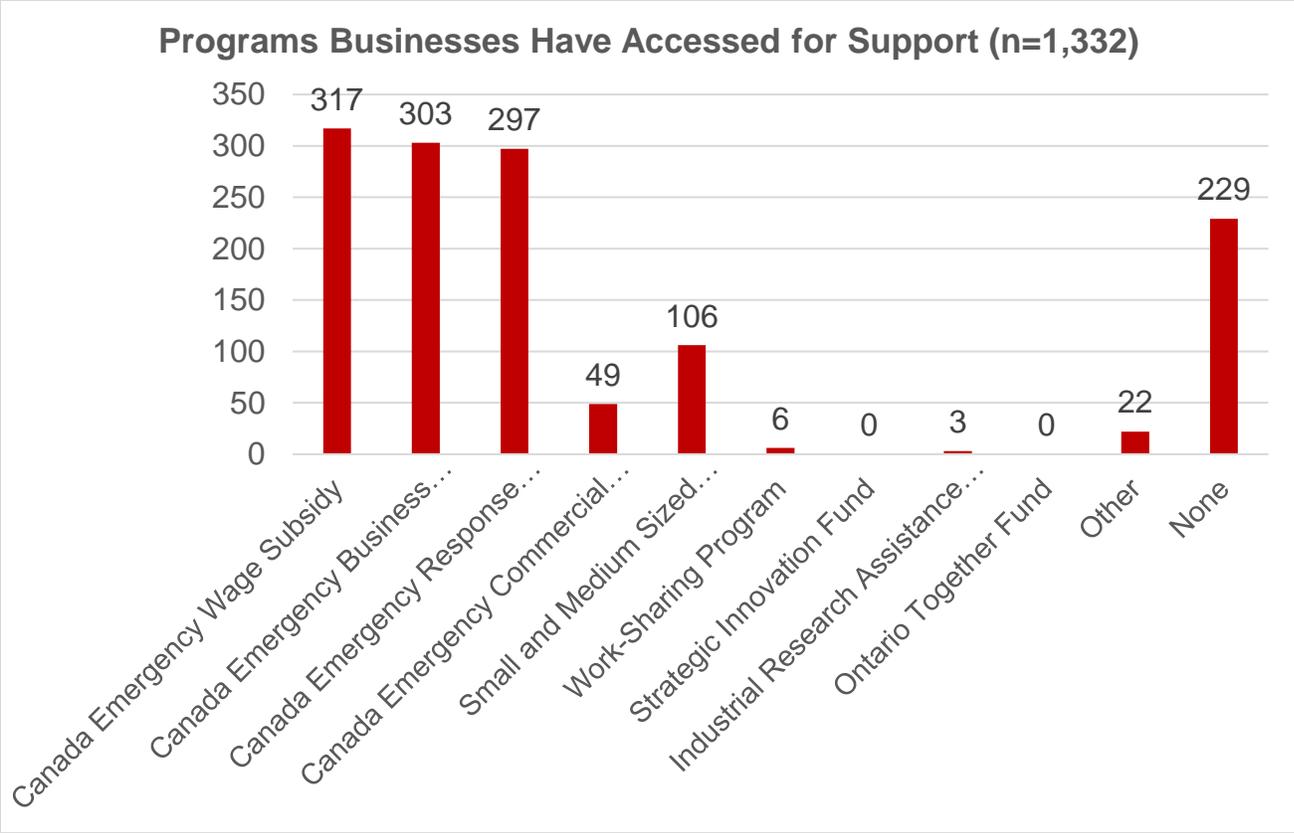
- Respondents reported the percentage of fixed business expenses they were able to pay under the current circumstances. These included expenses such as rent, insurance, subscriptions, equipment leases, payments on loans, depreciation, advertising, etc.
- Almost half of respondents (45%) reported that they were able to cover 100% of their current fixed expenses. However, 471 (55%) reported that they were not able to cover total current fixed expenses.
- 193 (22%) reported only being able to cover 1 to 25 percent of expenses, 121 (14%) reported only being able to cover 26 to 50 percent of current fixed expenses, 88 (10%) reported only being able to cover 51 to 74 percent, and 461 (53%) reported being able to cover 76 to 100 percent.

Business Status

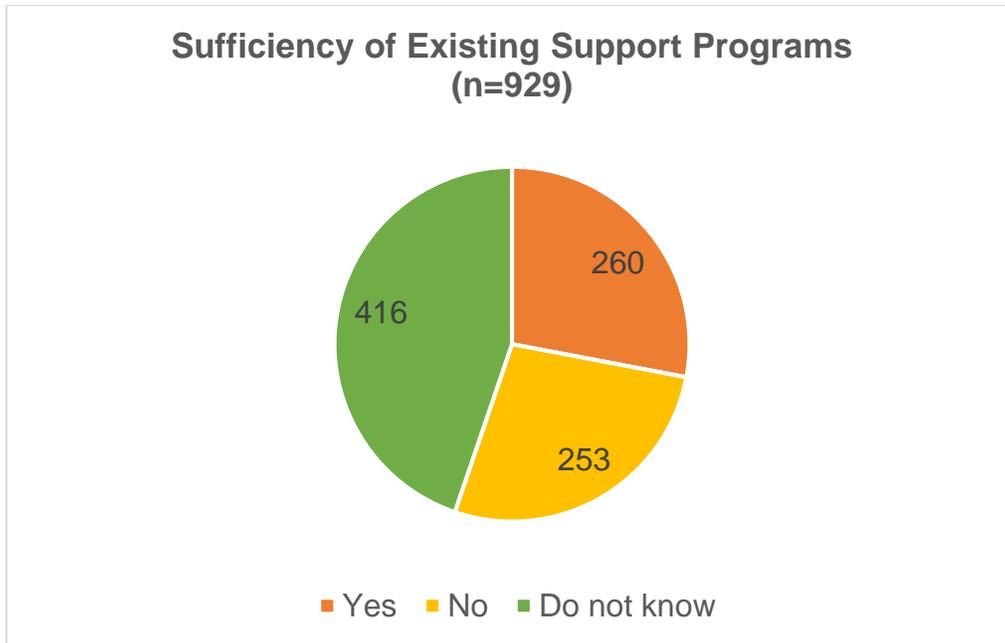
The following section provides information specific to the current status of business respondents including their well-being, support programs accessed, the sufficiency of the support programs offered, supports desired from local and regional government, resources required to pursue new opportunities, capital required to operate under COVID-19 precautionary measures, operating capacity under COVID-19 precautionary measures, and supply chain characteristics and sourcing intentions.



- Businesses were asked to identify their current business' level of vulnerability. Of 991 respondents, 68 (7%) indicated they were at risk of imminent permanent closure, 275 (28%) indicated that were vulnerable to closure, 403 (41%) indicated that they were sustaining, 190 (19%) indicated that they were stable, and 55 (6%) indicated that they were doing well.
- It is important to highlight that 343 (35%) of respondents are at serious risk of closure.

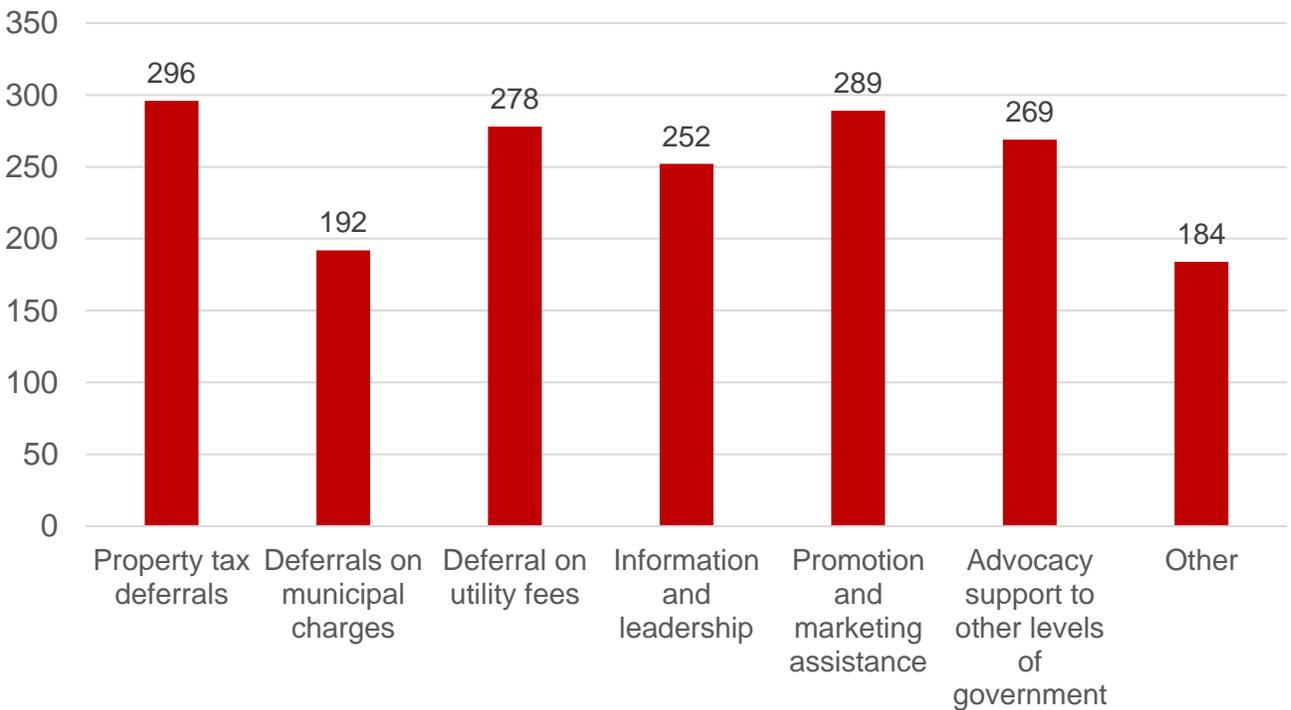


- A number of new business support programs were launched and some existing programs were directed to provide support to businesses struggling through COVID-19.
- In total, 1,103 respondents accessed programs while 229 respondents did not access any programs.
- Based on survey results, Canada Emergency Wage Subsidy program was the most accessed with 317 recipients, followed by Canada Emergency Business Account with 303 recipients, Canada Emergency Response Benefit with 297 recipients, and Small and Medium-Sized Business Enterprise Loan with 106 recipients.
- The lesser access programs included Canada Emergency Commercial Rent Assistance with 49 recipients, other programs with 22 recipients, Work-Sharing program with 6 recipients, and Industrial Research Assistance Program with 3 recipients.
- Respondents did not access the Strategic Innovation Fund or the Ontario Together Fund.

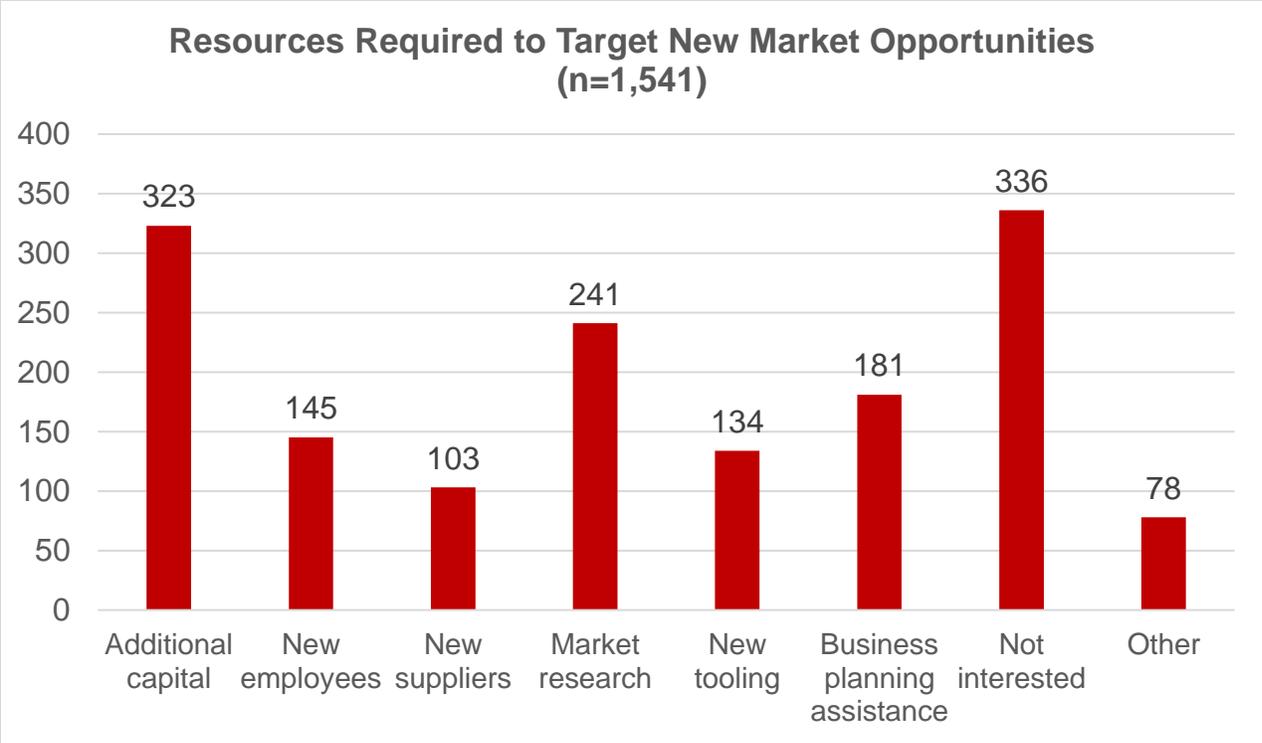


- Businesses were asked if the existing programs were sufficient to support them through COVID-19 to recovery. Of 929 respondents, 260 (28%) indicated yes, 253 (27%) indicated no, and 416 (45%) indicated that they do not know.

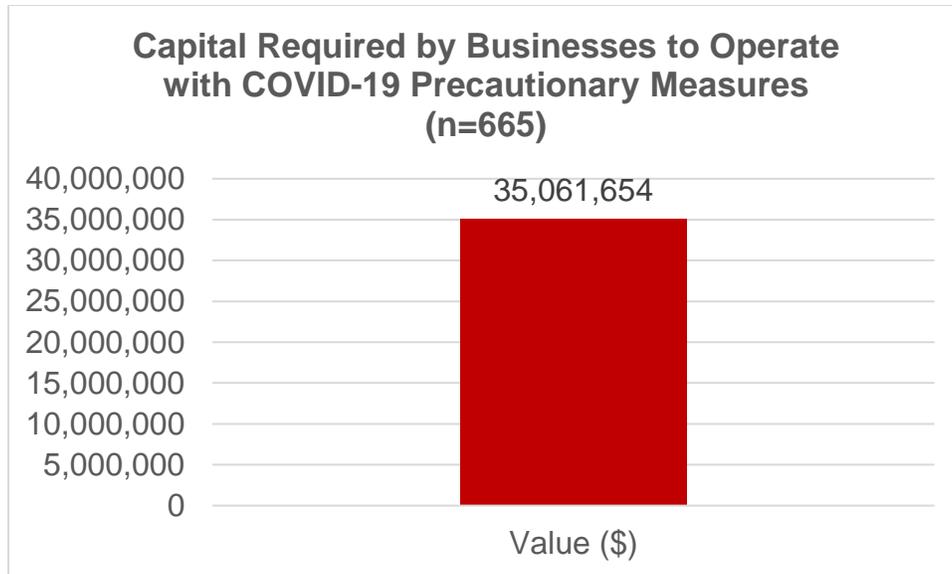
Supports Desired from Local and Regional Municipalities (n=1,760)



- Businesses were asked what type of supports they would like from local and regional municipalities.
- 296 (17%) reported they would like property tax deferrals, 289 (16%) reported they would like promotion and marketing assistance, 278 (16%) reported they would like deferrals on utility fees, 269 (15%) reported they would like advocacy and support to other levels of government, 252 (14%) indicated they would like information and leadership from the municipalities, 192 (11%) reported they would like deferrals on municipal charges.
- 184 (10%) reported other, which includes regulatory reductions, property tax forgiveness and reductions, and grants.

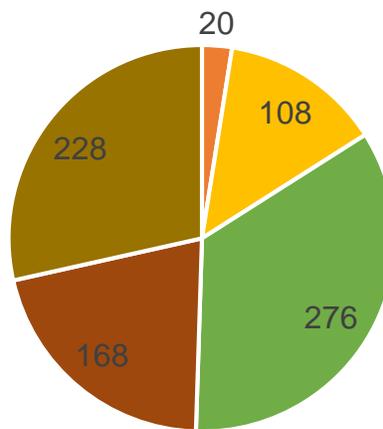


- Due to COVID-19, many businesses have had to make substantial pivots to survive.
- Businesses were asked what resources they require in order to pursue a new market and/or service/product delivery opportunities. 323 (21%) indicated they require additional capital, 241 (16%) indicated they need market research support, 181 (12%) indicated they need business planning assistance, 145 (9%) indicated they need new employees, 134 (9%) indicated they need new tooling, and 103 (7%) indicated they need new suppliers.
- 78 (5%) indicated they needed other supports, which were mostly technical/advisory in nature.



- In order to operate with COVID-19 precautionary measures in place businesses will need to make substantial capital investments into supplies, infrastructure and other fixed assets.
- 665 respondents reported a need to make a combined capital investments of \$35.1 million to operate with COVID-19 precautionary measures in place.
- The sectors that reported the highest amount of capital investments required included manufacturing (\$8.43 million), accommodation and food services (\$7.94 million), health care and social assistance (\$4.0 million), agriculture (\$2.7 million), and retail trade (\$1.4 million).

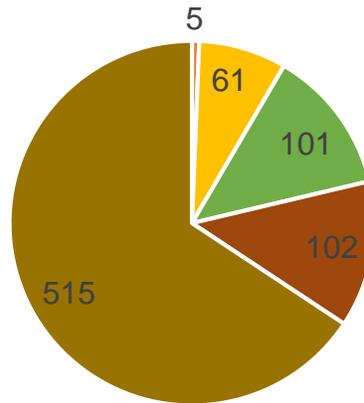
Capacity Businesses Can Operate Under COVID-19 Precautionary Measures (n=800)



■ 0 percent ■ 1 to 25 percent ■ 26 to 50 percent
■ 51 to 75 percent ■ 76 to 100 percent

- With COVID-19 precautionary measures in place, many businesses will not be able to operate at full capacity. Only 143 of 800 companies (18%) reported that they would be able to operate at full capacity with precautionary measures in place. 20 businesses (2.5%) reported that they would not be able to operate with precautionary measures in place.
- Almost half of respondents (384) have indicated they would be able to operate at 50% capacity or less, while 396 respondents (49%) reported that they would be able to operate above 50% capacity.

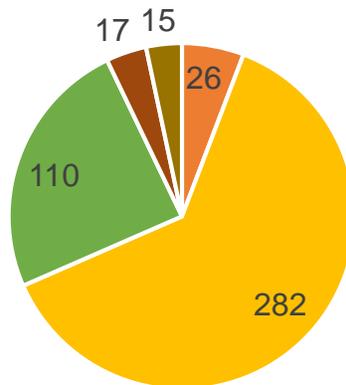
Percentage of Supply Chain Sourced in Canada (n=784)



- 0 percent
- 1 to 25 percent
- 26 to 50 percent
- 51 to 75 percent
- 76 to 100 percent

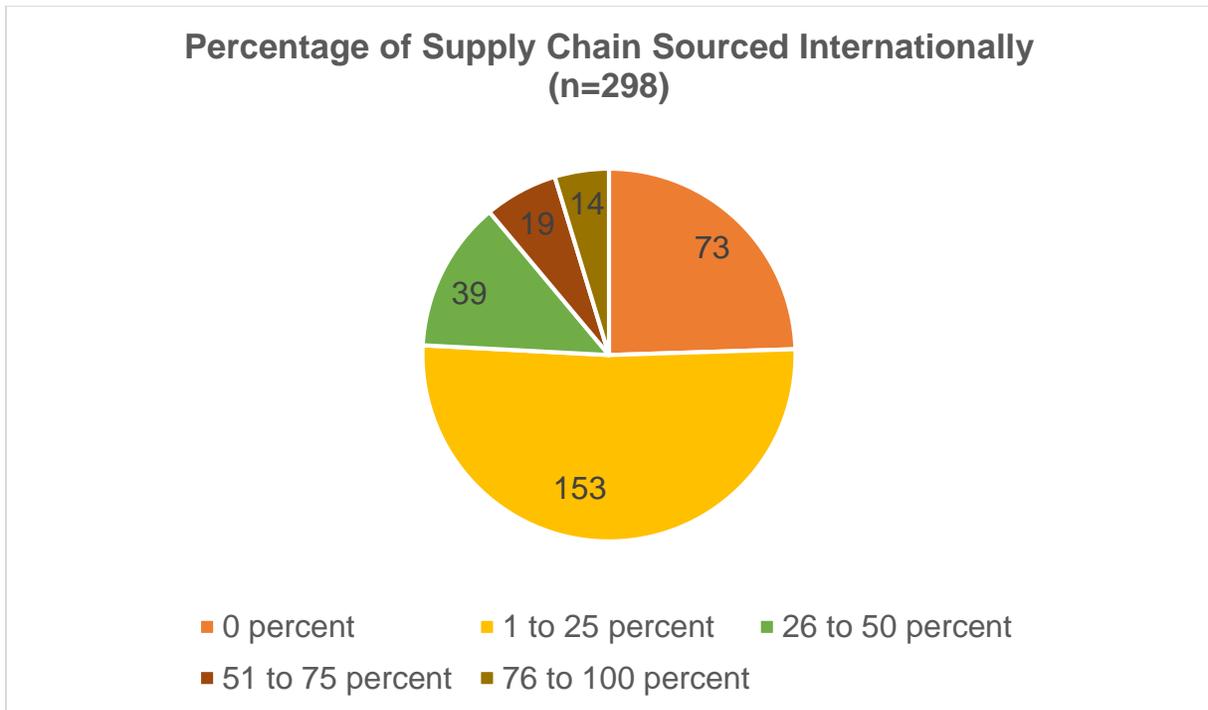
- Businesses were asked the percentage of supply chains sourced in Canada.
- Only 5 (1%) of respondents reported sourcing no supplies in Canada, while 61 (8%) reported sourcing 1 to 25 percent, 101 (13%) reported sourcing 26 to 50 percent, 102 (13%) reported sourcing 51 to 75 percent, and 515 (66%) reported sourcing 76 to 100 percent.

Percentage of Supply Chain Sourced in USA (n=450)



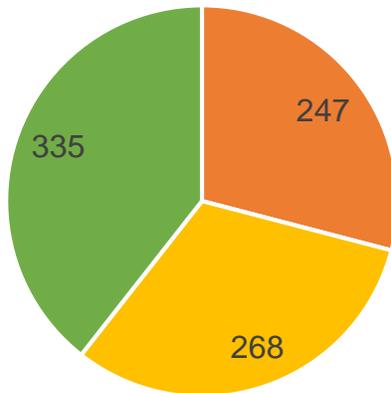
- 0 percent
- 1 to 25 percent
- 26 to 50 percent
- 51 to 75 percent
- 76 to 100 percent

- Business were asked to indicate the percentage of supply chains sourced in the USA. 26 (6%) reported no USA supply chains, 282 (63%) reported 1 to 25 percent, 110 (24%) reported 26 to 50 percent, 17 (4%) reported 51 to 75 percent, and 15 (3%) reported 76 to 100 percent.



- Businesses were also asked to indicate the percentage of supply chains sourced internationally. 73 (24%) reported no international suppliers, 153 (51%) reported 1 to 25 percent, 39 (13%) reported 26 to 50 percent, 19 (6%) reported 51 to 75 percent, and 14 (5%) reported 76 to 100 percent.

Plan to Increase Volume of Supplies Sourced in Canada (n=850)



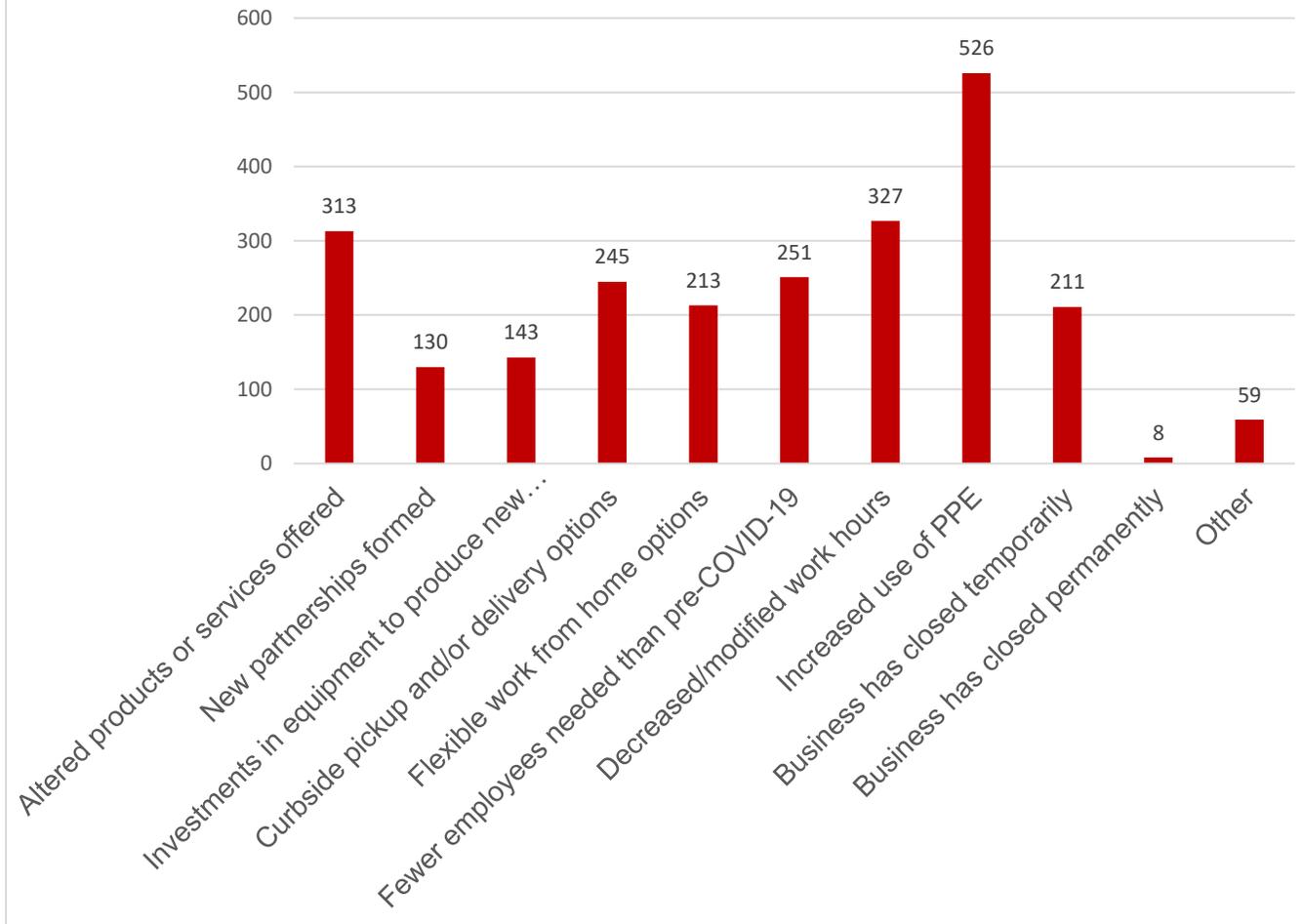
■ Yes ■ No ■ Do not know

- Businesses were asked if they plan to increase the volume of supplies they are sourcing from within Canada. 247 (29%) respondents reported yes, 268 (32%) reported no, and 335 (39%) reported that they do not know.

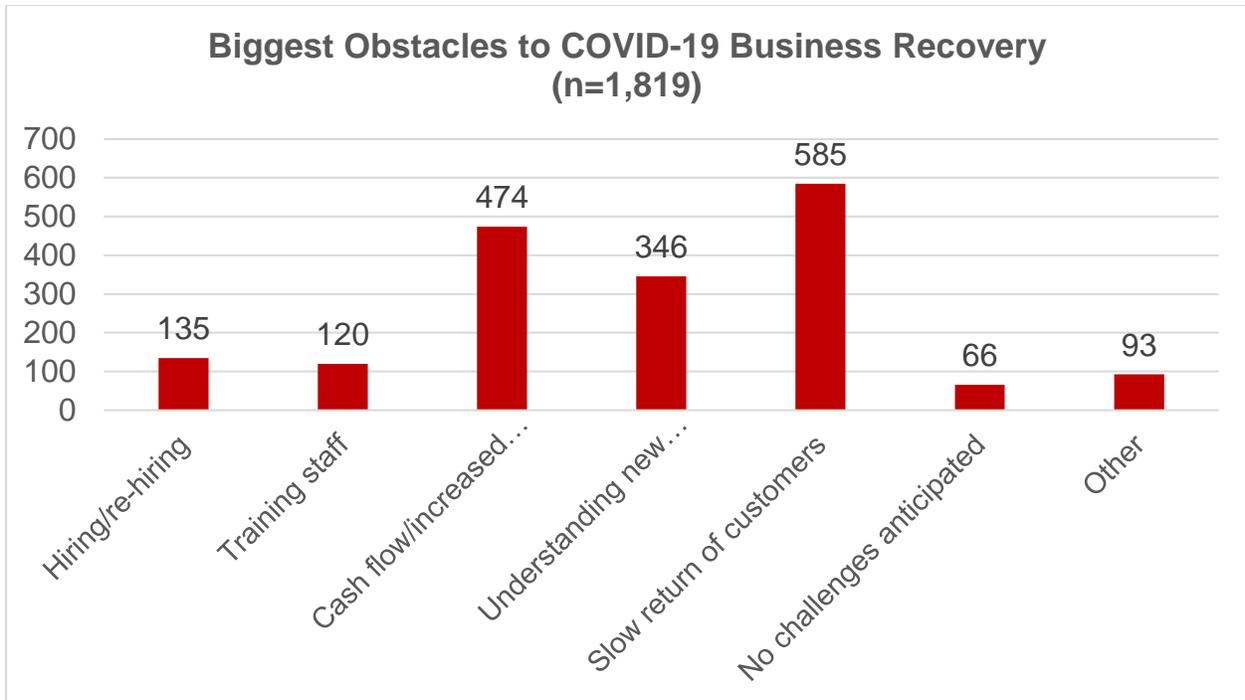
Recovery

The following section provides information on COVID-19 measures being maintained going forward, the biggest obstacles businesses face to recovery, businesses that need help with COVID-19 recovery, assistance measures required by businesses, and mental health resources required by businesses.

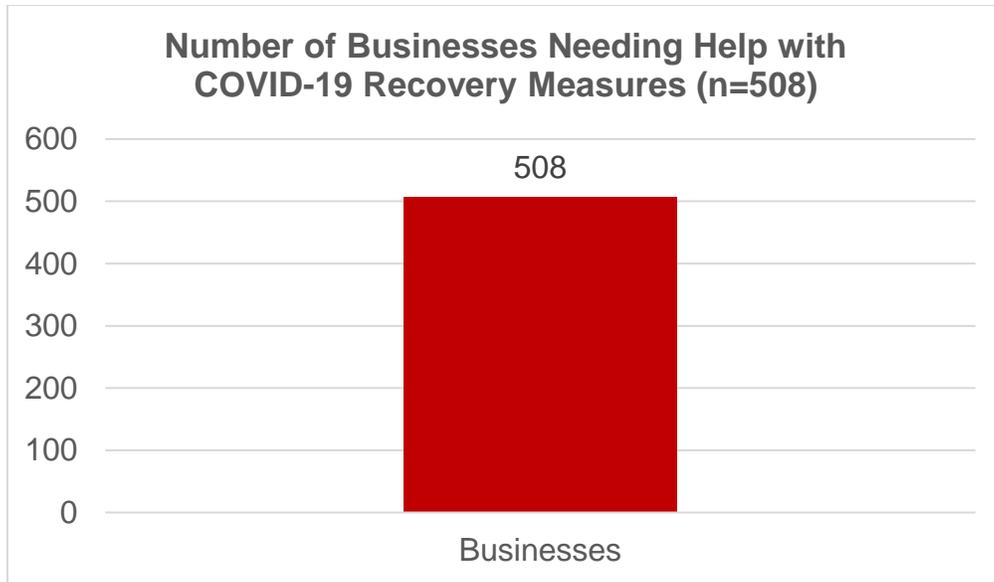
COVID-19 Business Measures Being Maintained (n=2,426)



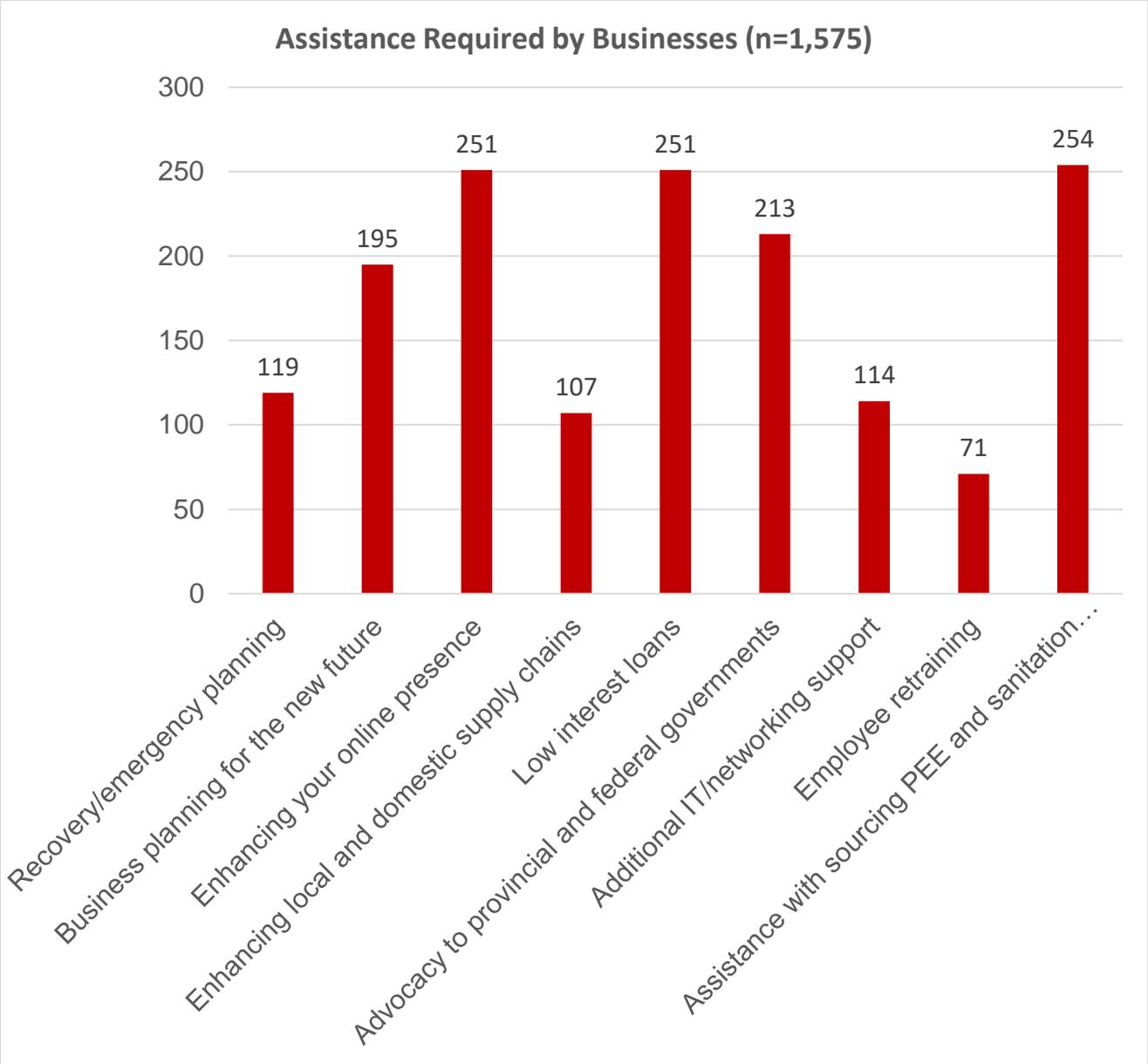
- Most businesses had to make substantial changes to operations with the onset of the COVID-19 pandemic, and many indicated they will maintain these changes going forward.
- The most prevalent change was increased use of PPE with 526 respondents (22%), followed by decreased/modified work hours with 327 respondents (13%), altered products or services offered with 313 respondents (13%), fewer employees needed than pre-COVID-19 with 251 respondents (10%), curbside pickup and/or delivery options with 245 respondents (10%), flexible work from home options with 213 respondents (9%), business has closed temporarily with 211 respondents (9%), investment in equipment to produce new offerings with 143 respondents (6%), new partnership formed with 130 respondents (5%), and other with 59 respondents (2%).
- 8 respondents (0.3%) reported closing the business permanently.



- The COVID-19 recovery process will present many obstacles and challenges to most businesses.
- Businesses reported the biggest obstacle to be the slow return of customers with 585 (32%) respondents, followed by cash flow/increased debt loads with 474 (26%) respondents, understanding new physical space requirements with 346 (19%) respondents, hiring or re-hiring with 135 (7%) respondents, training staff (with 120 (7%) respondents, and other with 93 (5%) respondents.
- 66 (4%) respondents reported no challenges anticipated.

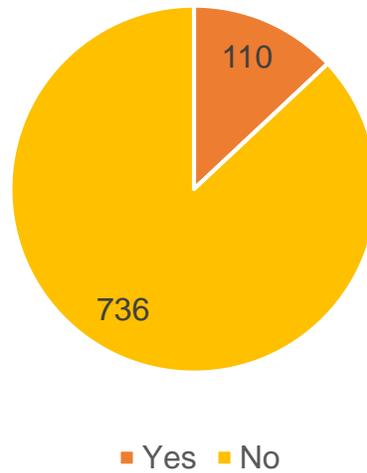


- Businesses will also require a significant amount of help and guidance when recovering from the impacts of COVID-19.
- 508 businesses (37%) of total respondents indicated that they need help with COVID-19 recover measures.



- The 508 businesses that reported needing help with COVID-19 recovery measures in the previous question selected 1,575 measures that they need help with.
- Businesses reported assistance with sourcing PPE and sanitation supplies as their biggest need with 254 (16%) respondents, followed by enhancing online presence with 251 (16%) respondents, low-interest loans with 251 (16%) respondents, advocacy to provincial and federal governments with 213 (14%) respondents, business planning for the new future with 195 (12%) respondents, recovery/emergency planning with 119 (8%) respondents, additional IT/networking support with 114 (7%) respondents, enhancing local and domestic supply chains with 107 (7%) respondents, and employee retaining with 71 (5%) respondents.

**Businesses That Request Mental Health Resources
from Niagara Region (n=846)**



- COVID-19 has affected the mental health and well-being of many people including business owners and employees.
- Businesses were asked if they would like to be contacted by Niagara Region Public Health for resources related to mental health. 846 businesses responded and 100 (13%) requested mental health resources while 736 (87%) did not.

Conclusion

All industry sectors and businesses in Niagara have experienced some form of negative effect from COVID-19. However, it is very clear that some have been affected disproportionately. The negative economic impact is staggering and if some businesses have not felt a negative effect yet, they may once they lost revenue, unemployment and decline in GDP ripples through the regional economy.

Revenue lost figures are staggering and have the potential to decimate Niagara's economy if the recovery process is prolonged and if we experience a second wave COVID-19. 745 respondents reported a combined loss of \$425.1 million. If we extrapolate this across the entire economy, the total estimated revenue losses would be \$7.8 billion. For perspective, total retail and restaurant expenditures in Niagara in 2017 alone were \$6.3 billion, tourism expenditures were \$2.4 billion, and Niagara's total GDP is approximately \$17.2 billion.

Niagara's GDP will be hit much harder than Ontario and Canada given our reliance on tourism-related industries, businesses and jobs. Niagara has a provincial tourism location quotient of 1.8, which means we have 1.8 times the concentration of jobs in Niagara than Ontario. This means our tourism industries will be affected much harder in Niagara than Ontario as a whole, so it is important to have resources and measures in place to support tourism in Niagara.

As mentioned, some industry sectors were affected disproportionately with respect to revenue loss and staff layoffs. Based on the survey results, the most vulnerable sectors include accommodation and food services; arts, entertainment and recreation; retail trade; other services; and, health care and social assistance. These sectors often involve businesses activities that rely on person-to-person interaction and or assembly of people in some form.

Most businesses surveyed (55%) cannot keep up with their current fixed expenses and this could lead to bankruptcies if recovery is prolonged, particularly in accommodation and food services; other services; arts, entertainment and recreation; health care and social assistance; and, retail trade

Many businesses are either at risk of imminent permanent closure (7%) or vulnerable to closure (28%) mainly affecting accommodation and food services; arts, culture and recreation; retail trade; and, health care and social assistance.

Many support programs have been accessed (1,332) by businesses across almost all industry sectors in Niagara. However, a high number of companies have specified the current supports are insufficient, especially in accommodation and food services; other services; retail trade; arts, entertainment and recreation; and health care and social assistance

Although many businesses are looking for some sort of financial relief from local and regional municipal governments, many are looking for non-financial supports including promotion and marketing assistance, advocacy and support to other higher levels of government, and information and leadership from municipalities.

Businesses will require a large range of support resources to pursue new market opportunities and diversify their markets and offerings in response to COVID-19. However, some in traditional industries and are not able to make substantial pivots.

A large amount of capital and investment is required for businesses to safely operate under COVID-19 precautionary measures. The average business will be required to invest \$52,724, which would equate to about \$720 million in capital investment required across the entire regional economy.

Business capacity and productivity declined abruptly in Niagara due to COVID-19. 72% of businesses cannot operate at full capacity under COVID-19 precautionary measures. 51% of businesses are operating at 50% capacity or less. Sectors that are not public-facing such as manufacturing, agriculture, construction, and finance and insurance and wholesale were not as affected.

Businesses in Niagara currently do most of their supply sourcing domestically. Some businesses that source from the USA and internationally will be looking to do more sourcing domestically to stabilize their supply chains while many are currently undecided on what they will do. This is an opportunity to help businesses find local suppliers where possible.

The recovery process will be resource intensive and require additional advisory supports to assist businesses through recovery. Many businesses are looking to maintain changes in operations due to COVID-19. However, many are looking to maintain lower staffing levels, which will pose a problem for employment recovery in Niagara

Businesses perceive many obstacles to recovery from COVID-19. Many businesses consider a slow return of customers, cash flow and debt repayment, and being familiar with new physical space requirements as their biggest obstacles to recovery.

Businesses will need a wide range of supports to recover from the effects of COVID-19. The biggest support needed will be sourcing the proper PPE and sanitation supplies and having sufficient supplies to meet demand. They will require financial supports such as no/low interest loans, technical and advisory supports to enhance their online presence, advocacy to upper levels of government for resources and support, market research, and business planning for the new future.

Lastly, many business owners and staff are dealing with mental health challenges during these times, especially given the uncertainties they face on a daily basis. They will need resources and supports to ensure that they remain well.

For more information economic development contacts are:

Niagara Region	Valerie Kuhns	Acting Director, Economic Development	valerie.kuhns@niagararegion.ca
Fort Erie	Caralee Grummett	Manager, Economic Development & Tourism Services	cgrummett@forterie.ca
Lincoln	Paul Dilanni	Economic Development Officer	pdilanni@lincoln.ca
Niagara Falls	Serge Felicetti	Director of Business Development	sfelicetti@niagarafalls.ca
Port Colborne	Julian Douglas-Kameka	Economic Development Officer	juliandouglas-kameka@portcolborne.ca
St. Catharines	Brian York	Director, Economic Development and Government Relations	byork@stcatharines.ca
Thorold	Marco Marino	Manager of Economic Development	marco.marino@thorold.ca
Welland	Dan Degazio	General Manager, Economic Development Recreation and Culture	dan.degazio@welland.ca

Appendix

Survey Instrument

1) Business name:

2) Municipality:

3) Number of employees:

4) Industry sector:

Agriculture

Mining, quarrying, oil and gas extraction

Utilities

Construction

Manufacturing

Wholesale trade

Retail trade

Transportation and warehousing

Information and cultural industries

Finance and insurance

Real estate management

Professional, scientific and technical services (includes business services)

Management of companies and enterprises

Administrative services, waste management and remediation

Educational services

Health care and social assistance

Arts, entertainment and recreation

Accommodation and food services

Other services

Public administration (government)

5) Please estimate the loss of business revenue to date due to COVID-19, as well as your projections for the next three months, six months, and 12 months:

To date

3 months

6 months

12 months

- 6) Have you made staff layoffs since April 1, 2020? If so, please indicate the number of full-time and part-time staff that have been laid off (e.g. 0, 1, 5, 10, etc.):
- 7) Do you anticipate having to make additional staff layoffs within the next 3-6 months? If yes, please indicate the number of anticipated layoffs (e.g. 1, 5, 10, etc.):
- 8) What percentage of your current fixed expenses (e.g. lease, mortgage, loans, insurance, etc.) are you able to pay under current conditions (e.g. 0, 10, 15, 50, 75, etc.)?
- 9) What best describes your current business situation?

At risk of imminent permanent closure
Vulnerable to closure
Sustaining
Stable
Doing well

- 10) Have you received support from any of the following programs or measures?
Please select all that apply:

Canada Emergency Wage Subsidy
Canada Emergency Business Account
Canada Emergency Response Benefit
Canada Emergency Commercial Rent Assistance
Small and Medium Sized Business Enterprise Loan
Work-Sharing Program
Strategic Innovation Fund
Industrial Research Assistance Program (IRAP)
Ontario Together Fund
Other (please specify)

- 11) Are existing government support programs sufficient to ensure your operation will remain viable and ready to reopen when COVID-19 restrictions are removed (yes/no)?
- 12) Are there other areas of support that the federal and/or provincial government can provide to assist your business during this time (please specify)?

13)What type of support would you like from local municipal/regional government right now (please check all that apply)?

- Property tax deferrals
- Deferrals on municipal charges
- Deferral on utility fees
- Information and leadership
- Promotion and marketing assistance
- Advocacy support to other levels of government
- Other (please specify)

14)If you were to change your product or service offering to target new market opportunities, what would you require?

- Additional capital
- New employees
- New suppliers
- Market research/intelligence
- New tooling
- Business planning assistance
- Not interested in offering new products or services
- Other (please specify)

15)What capital investments will be required for your business to operate safely under physical distancing and/or other precautionary measures (specify value)?

16)What capacity will your business be able to operate at while adhering to social distancing and other precautionary measures when you are able to reopen (e.g. 10%, 50%, 75%, etc.)?

17)What percentage of your supply chains and/or business supplies are sourced within Canada, the United States, and internationally (e.g. 10%, 20%, etc.)?

- Canada:
- United States:
- International:

18)Do you plan to increase the volume of supplies you are sourcing within Canada (yes/no)?

19) Do you anticipate maintaining any of the following changes you implemented due to COVID-19 (check all that apply)?

- Altered products or services offered
- New partnerships formed
- Investments in equipment to produce new products or provide new services
- Curbside pickup and/or delivery options
- Flexible work from home options
- Fewer employees needed than pre-COVID-19
- Decreased/modified work hours
- Increased use of PPE in the workplace
- Business has closed temporarily
- Business has close permanently
- Other (please specify)

20) What do you perceive to be your business' biggest obstacle to recovery from COVID-19? Check all that apply:

- Hiring/re-hiring
- Training staff
- Cash flow/increased debt loads
- Understanding new physical space requirements/enforcement
- Slow return of customers
- No challenges anticipated
- Other (please specify)

21) Would you like assistance with any of the following COVID-19 recovery measures (check all that apply)?

- Recovery/emergency planning
- Business planning for the new future
- Enhancing your online presence
- Enhancing local and domestic supply chains
- Low interest loans
- Advocacy to provincial and federal governments
- Additional IT/networking support
- Employee retraining
- Assistance with sourcing PPE and sanitation supplies

22) If you selected any of the items above, please provide your email address:

23) Due to COVID-19, employers and employees in Niagara are facing increased stress, anxiety and uncertainty about the future. Would you like to be contacted by Niagara Region Public Health regarding the mental health resources and supports available for your workplace? If yes, please provide your email address: