



COVID-19 Task Force

Survey #3

Preliminary Results



Survey Overview

Preliminary survey results are as of May 19, 2020 at which time the survey was closed.

This summary report highlights key trends and themes from our business community and should not be considered statistically accurate. Note that for this report data has not been validated to identify where more than 1 response has been obtained for the same organization. Figures presented within have been rounded.

Survey Format

The survey contained 13 questions. Each question in the survey was optional.

Survey logic was applied based on the selection of supply change impacts. Only where respondents entered “Yes” to supply chain changes (Q7) were they asked to answer Q8 to identify types of changes.

The survey asks about severity of impacts, business recovery time, financial impact, and other questions that may cause high stress, and the introduction to the survey provided a disclaimer.

Summary of Total Responses

396

Number of Responses

96%

Survey Completion

6m:30s

Average Time Spent



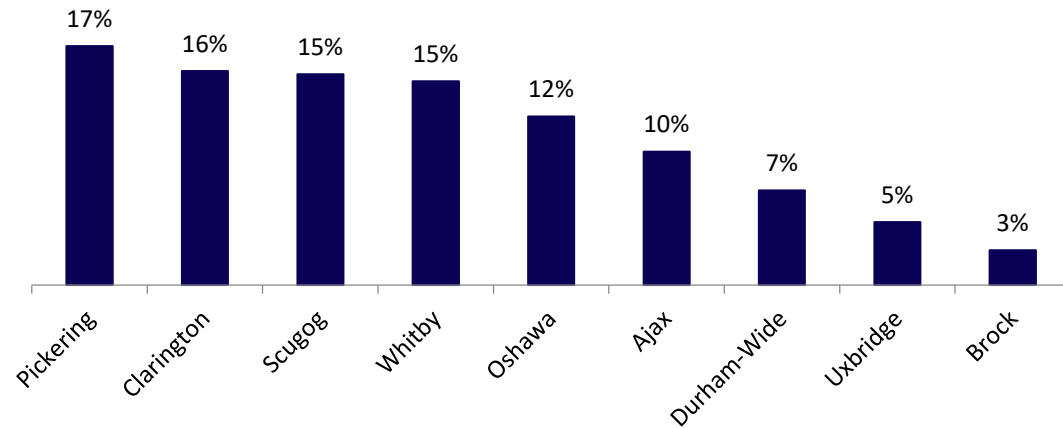
Survey Response: Summary

Location and Membership

Observations

Q1

Primary Business Location



21 respondents noted that they were from outside of Durham, predominantly other GTA locations including Toronto, Mississauga, and Scarborough.

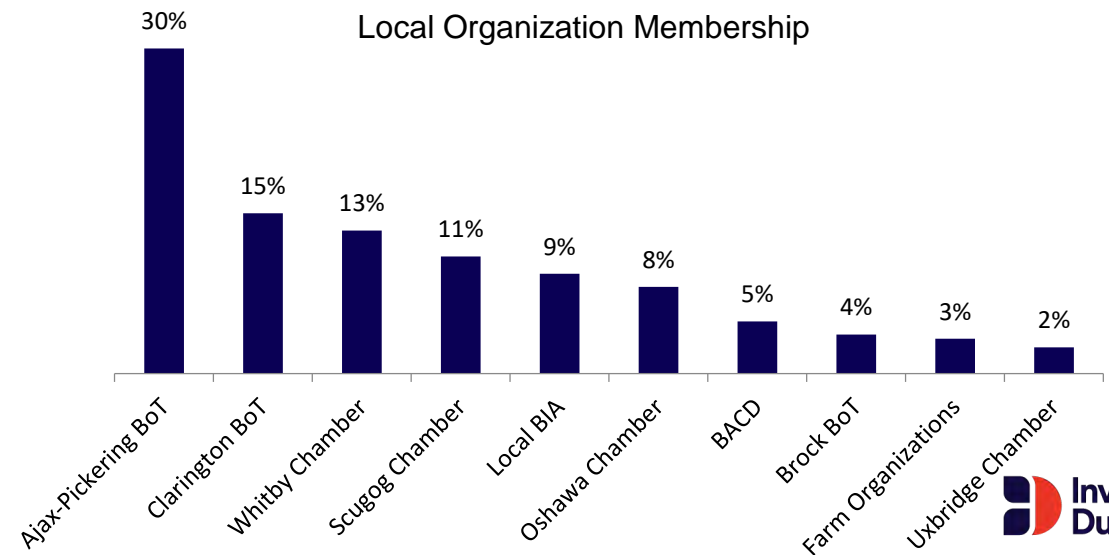
Number of responses: 392

Q12

Respondents were asked if they have a membership with any local organizations. 63% of respondents noted that they were a member of a local organization.

Number of responses: 250

Local Organization Membership





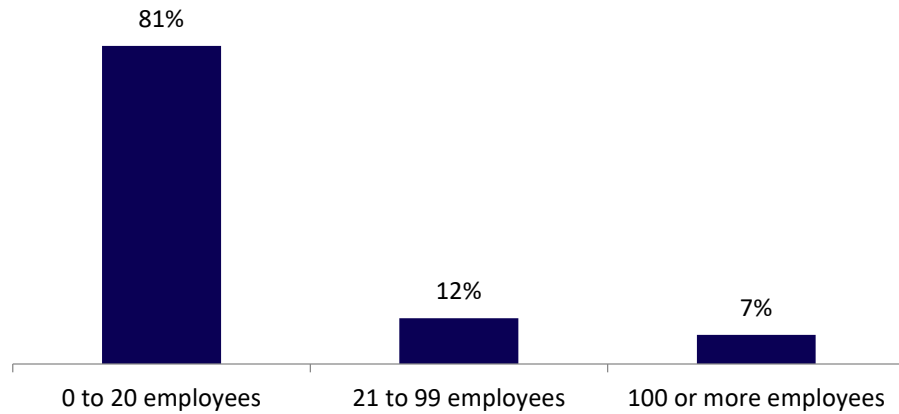
Survey Response: Summary

Company Size and Industry

Observations

Q10

Company Size (Normal Conditions)



Percentage of companies within each size category were consistent with results of Survey #2.

Number of responses: 378

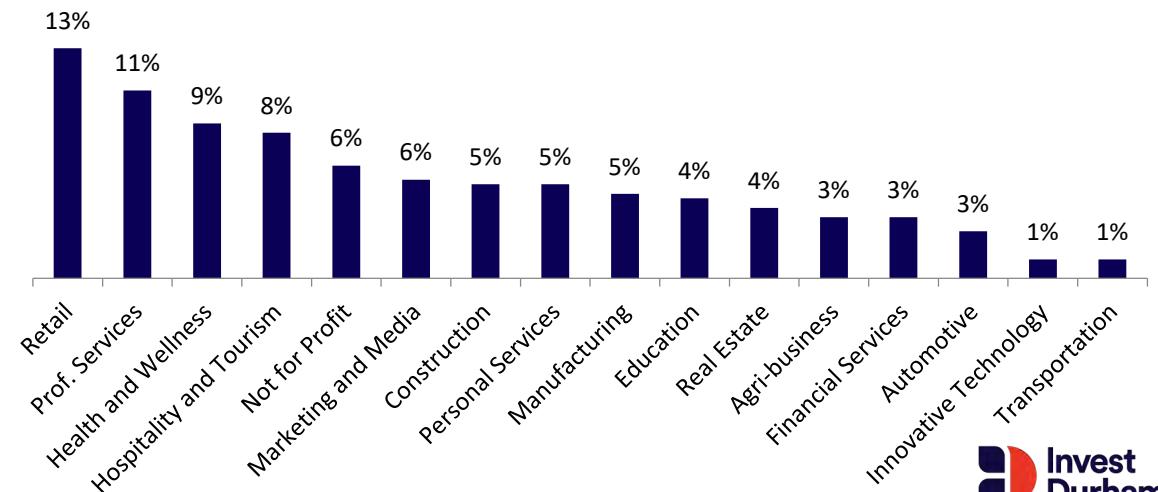
Q11

The top 90% of responses were from industries noted in the chart below.

The remaining respondents selected "Other" as an industry.

Number of responses: 379

Business Industry





Survey Response: Summary

Q2 - Current Business Impact: What is your organization's current level of impact due to the COVID-19 pandemic?

Observations

98% of survey respondents answered this question with only 6 respondents not providing a response.

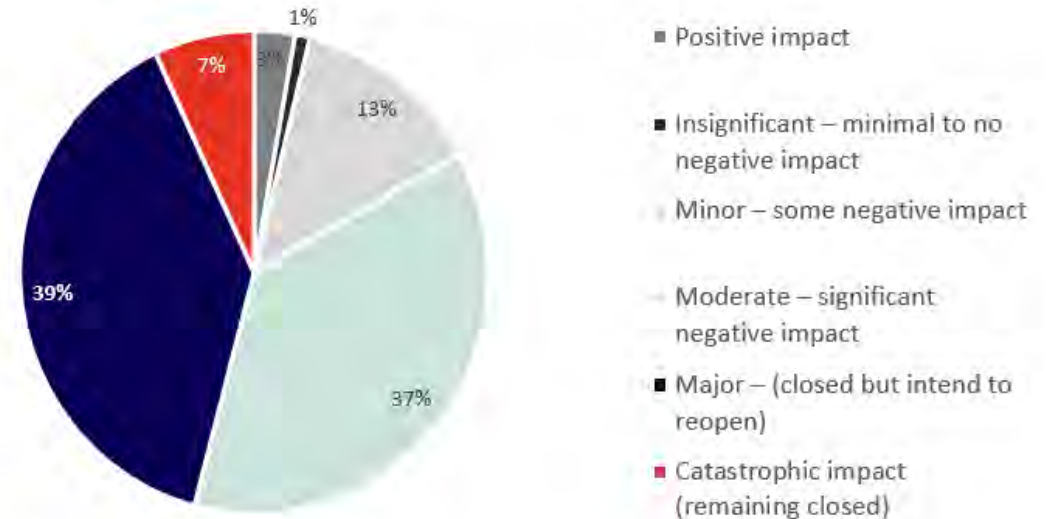
46% of respondents report major or catastrophic impacts to their businesses

37% report moderate business impact, while 14% report only minor or insignificant impacts.

Approximately 3% of respondents (11) have noted that they have had a positive impact during the COVID-19 crisis.

Number of responses:390

Current Business Impact





Survey Response: Summary

Q3 – Provincial Recovery Plan

Observations

There was a 99% response rate to this question.

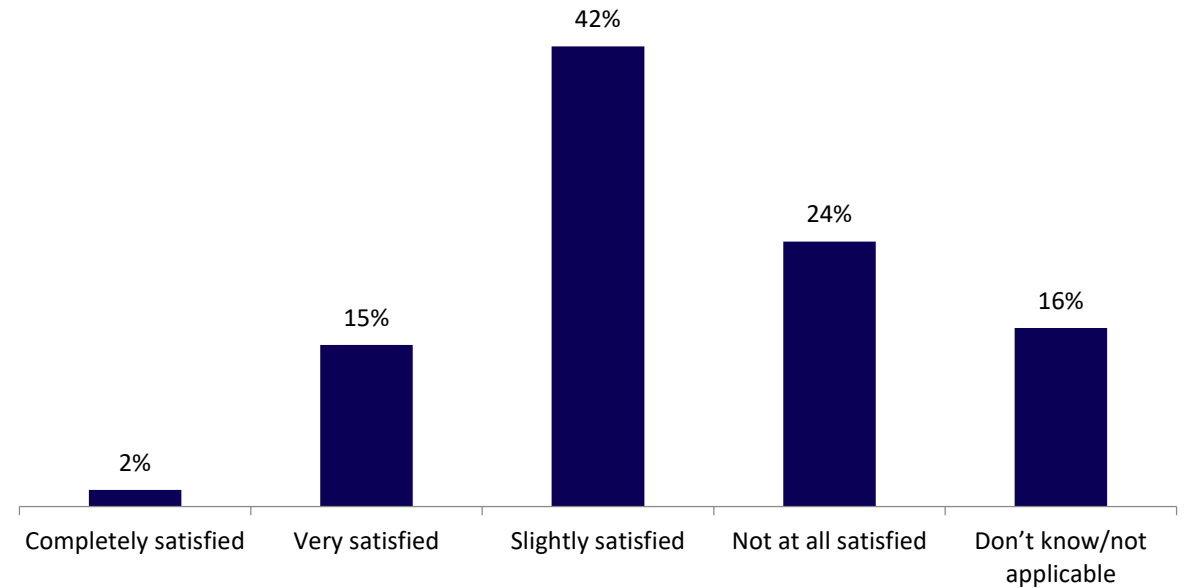
Respondents were asked to what extent they were satisfied that the Provincial Recovery plan addresses concerns about the COVID 19 recovery phase.

Comments provided were mixed. Key themes included:

- Lack of support for rent recovery
- Too much ambiguity
- A mix of responses between opening with caution and taking a more aggressive approach

Number of responses: 391

Provincial Recovery Framework





Survey Response: Summary

Q4 – Barriers to Recovery

Respondents were asked to note their level of concern across various factors. A selection was made from the options: “extreme barrier, moderate barrier, somewhat of a barrier or not applicable”

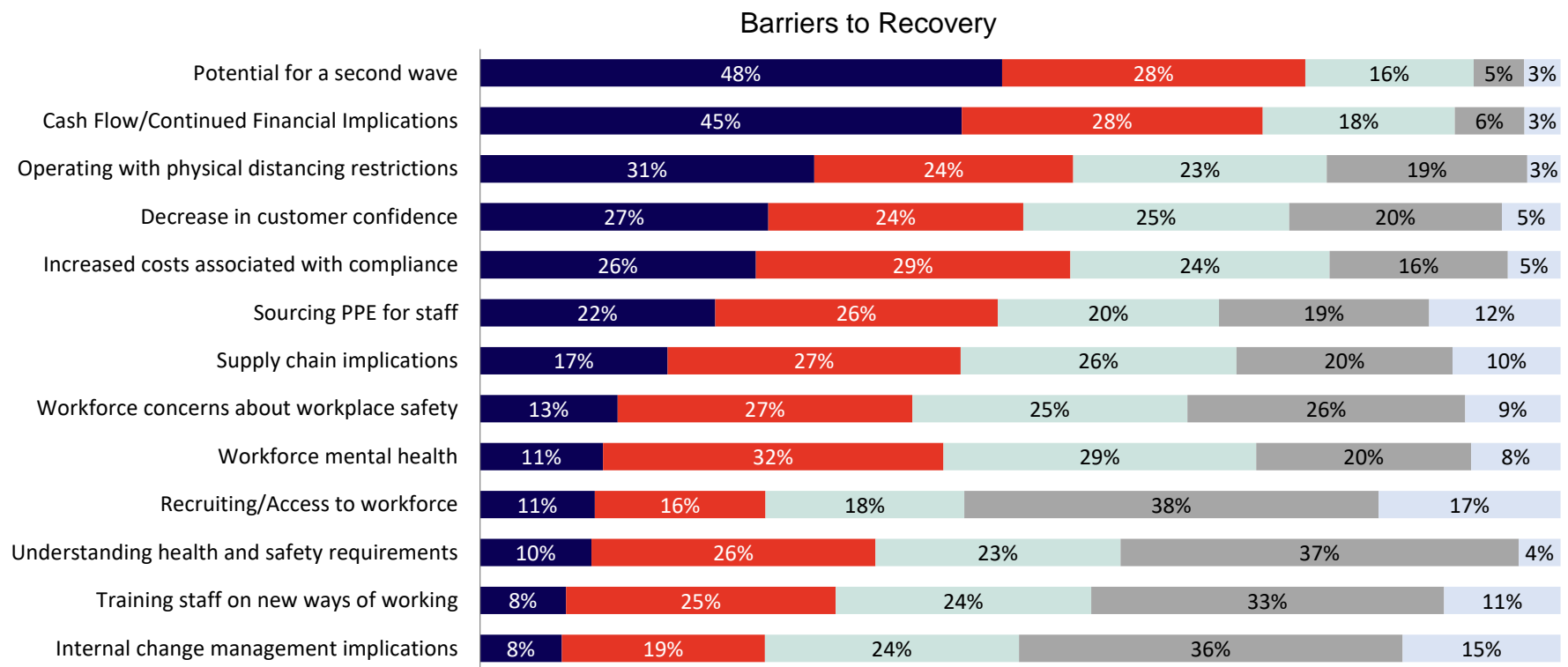
Observations

Number of responses: 389

76%
Of respondents note the possibility of a second wave as the top barrier to recovery.

73%
Identify continuing financial implications as a barrier to recovery

55%
Concerned about increased cost of compliance



■ Extreme Barrier ■ Moderate Barrier ■ Somewhat of a Barrier ■ Not a Barrier ■ Unknown/Not Applicable



Survey Response: Summary

Q5 – Economic Stimulus Strategies

Respondents were asked to rank potential strategies in terms of their importance in stimulating the Regional economy. A selection was made from the options: “very important, important, somewhat important, not important or not applicable”

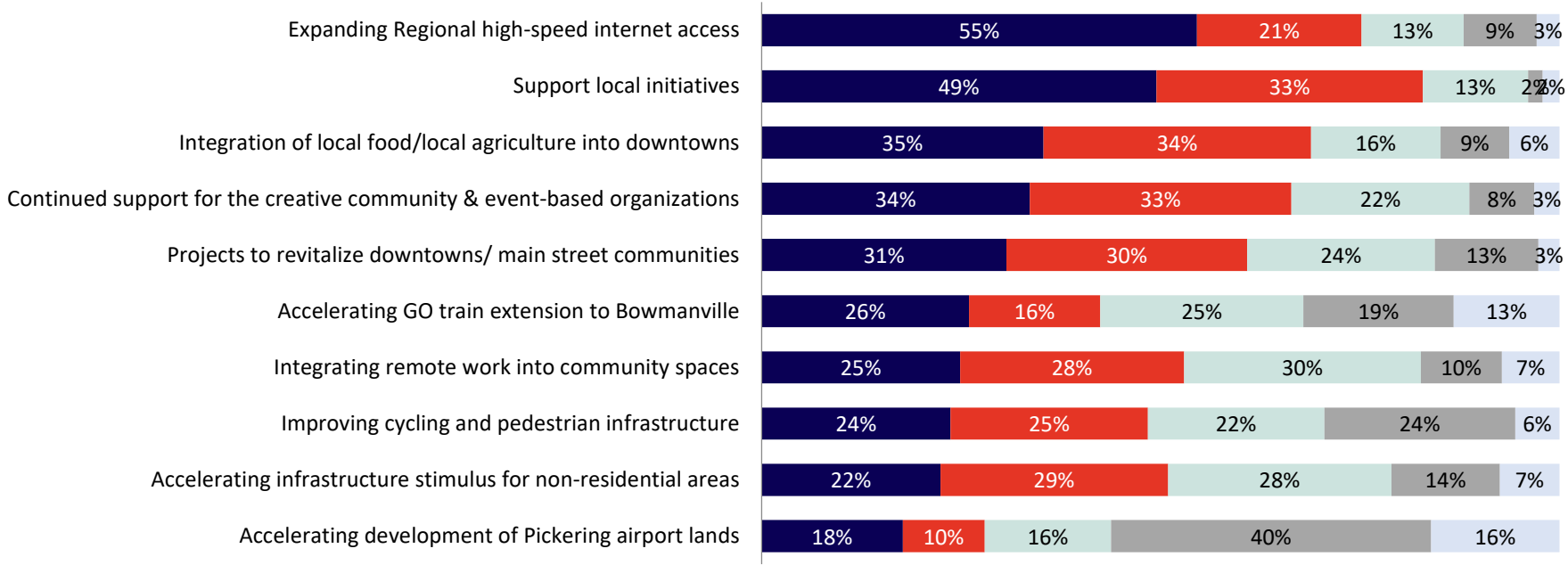
Observations

Number of responses: 386

55%
Note expanding high speed internet is very important

49%
Note that supporting local initiatives are very important

Recovery Stimulus Strategies



Very Important Important Somewhat Important Not Important Not Applicable





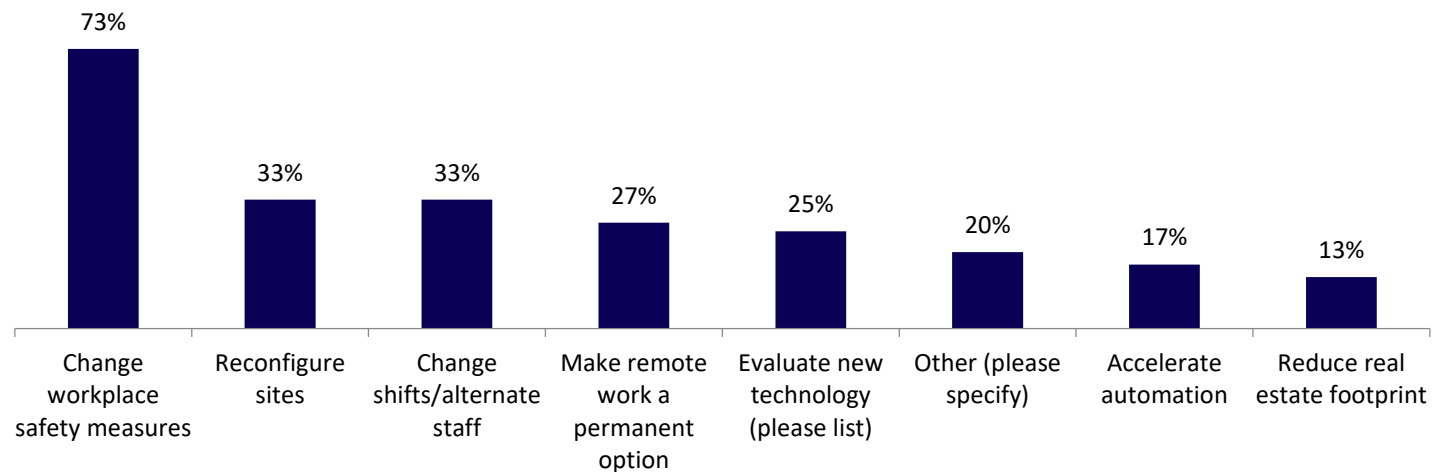
Survey Response: Summary

Q6 - Business Recovery: Organizational Strategies

Respondents were asked: Which of the following is your company planning to implement once you start to transition back to on-site work? (select all that apply)

Observations

Organizational Recovery: Strategy



93% of respondents answered this question. 20% of respondents noted 'other strategies' would be implemented, and the majority of these included pivoting to online mechanisms for business operations (work from home, ecommerce, modifying websites, collaboration tools, etc.) Notably, one comment specifically noted the use of more large scale high tech agriculture tools on smaller scale local farms.

Number of responses: 368

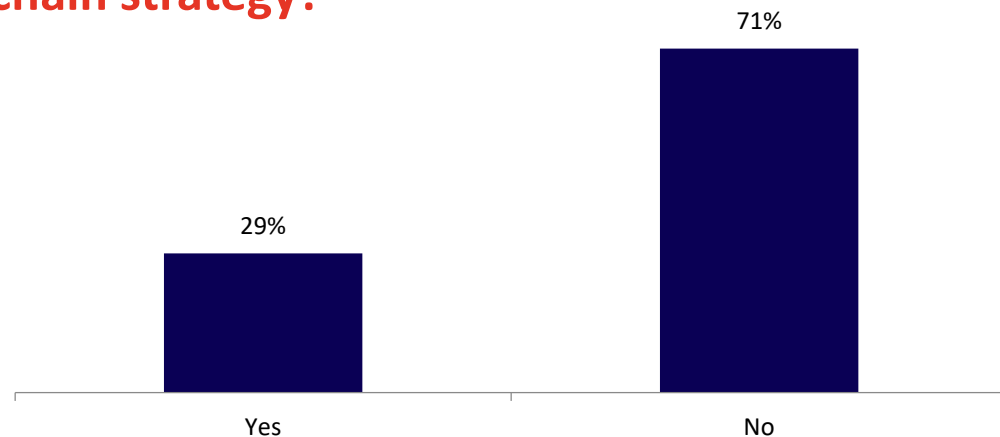


Survey Response: Summary

Q7 and Q8: Supply Chain Strategies

Observations

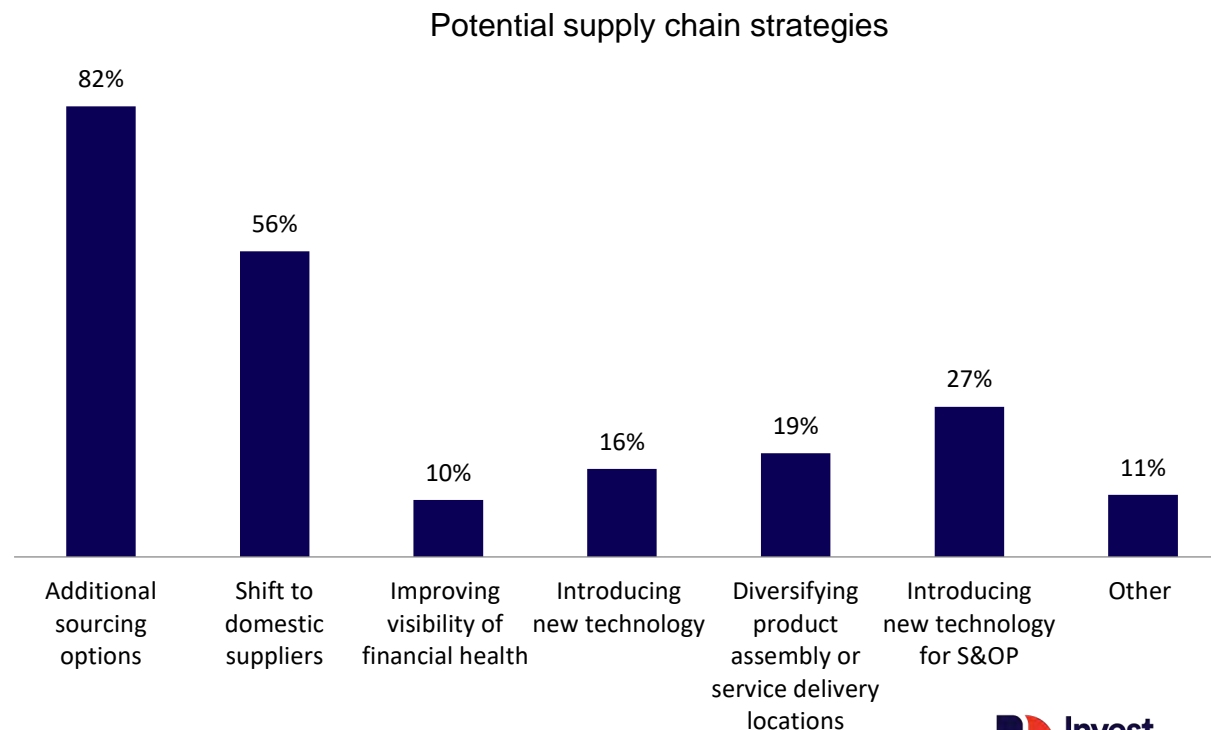
Q7: Are you considering changes to your supply chain strategy?



29% of respondents noted that they are considering changes to their supply chain strategies. These respondents were prompted to answer question 8.

Approximately 98% of survey respondents answered this question.
Number of responses: 389

Q8: Supply chain strategies (select all that apply)





Survey Response: Summary and Comparison

Q9 - Business Recovery: Estimate

Business Recovery - If you were to estimate a recovery period if the COVID-19 pandemic were to end today, how much time do you think it would take to get back to business as usual?

Observations

There was a 96% response rate to this question.

Approximately 43% of respondents noted that they would be able to recover within 0-6 months.

Notably, compared to Survey 2 results, the data in survey 3 notes 27% of respondents who will take more than 12 months to recover, compared to 8% in the first survey.

Number of responses: 379

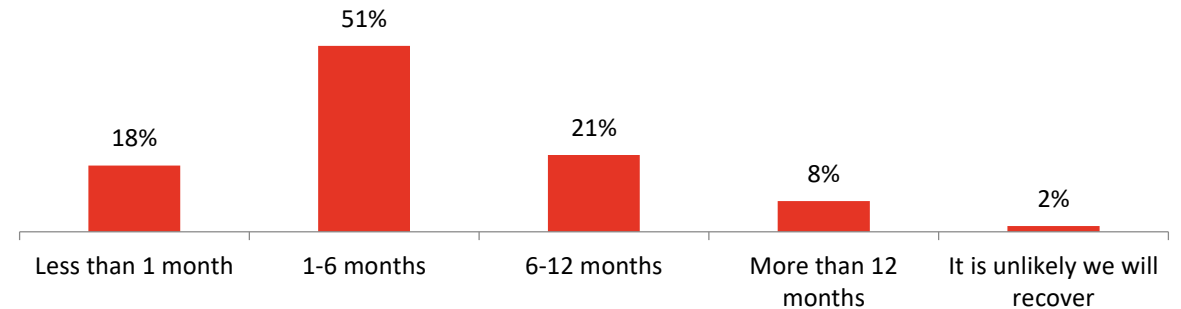
5

Business that report it is unlikely they will recover

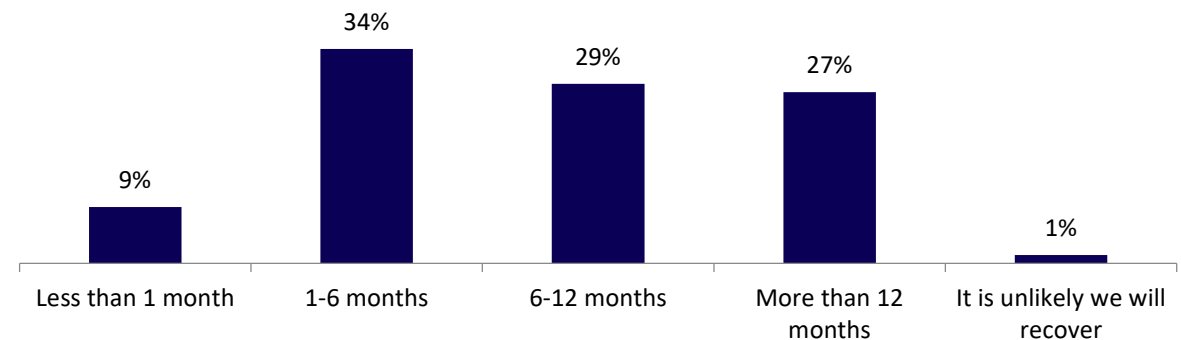
43%

Respondents who indicate they would recover in 0-6 months

Estimated Recovery Period: Survey 2 Responses



Estimated Recovery Period: Survey 3 Responses





Thank You