

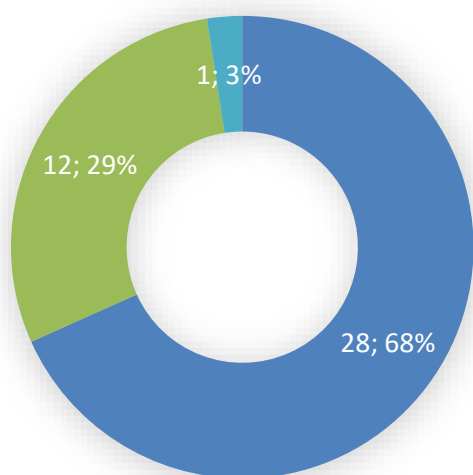
Orangeville COVID Recovery Survey Results August 17 – September 10, 2020

Sectoral Representation and Operating Status

Representation of the Town’s primary industries was achieved. During the surveying process, some emphasis was placed on outreach to highly impacted tourism-related ventures (Accommodation and Food Services, Retail Trade, and Arts, Entertainment and Recreation).

The majority of businesses (68%) indicated that they had been able to remain open in some capacity and/or with an alternative operating model throughout the pandemic stages, 30% indicated that they had reopened after a temporary closure and one business participated that had closed permanently.

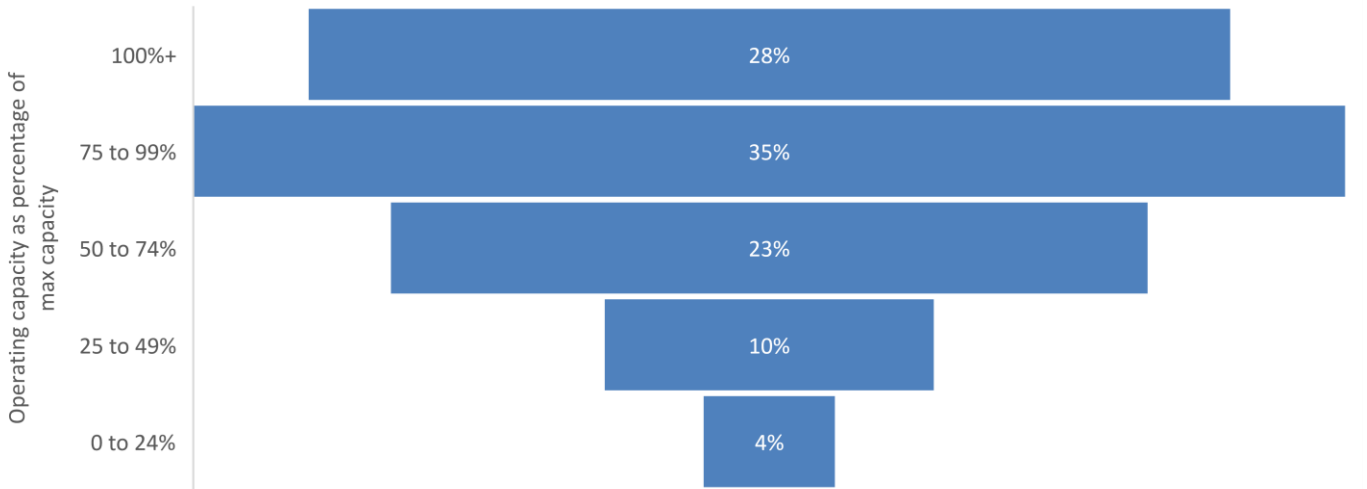
Sector	Responses
Manufacturing	7
Accommodation and Food Services	6
Professional, Scientific, and Technical Services	5
Retail Trade	5
Arts, Entertainment, and Recreation	4
Finance and Insurance	4
Other Services	3
Construction	2
Health Care and Social Assistance	2
Administrative and Support	1
Real Estate and Rental and Leasing	1
Wholesale Trade	1
Total	41



- Open (never closed or remained open under alternative operating model)
- Reopened after temporary closure
- Permanently closed

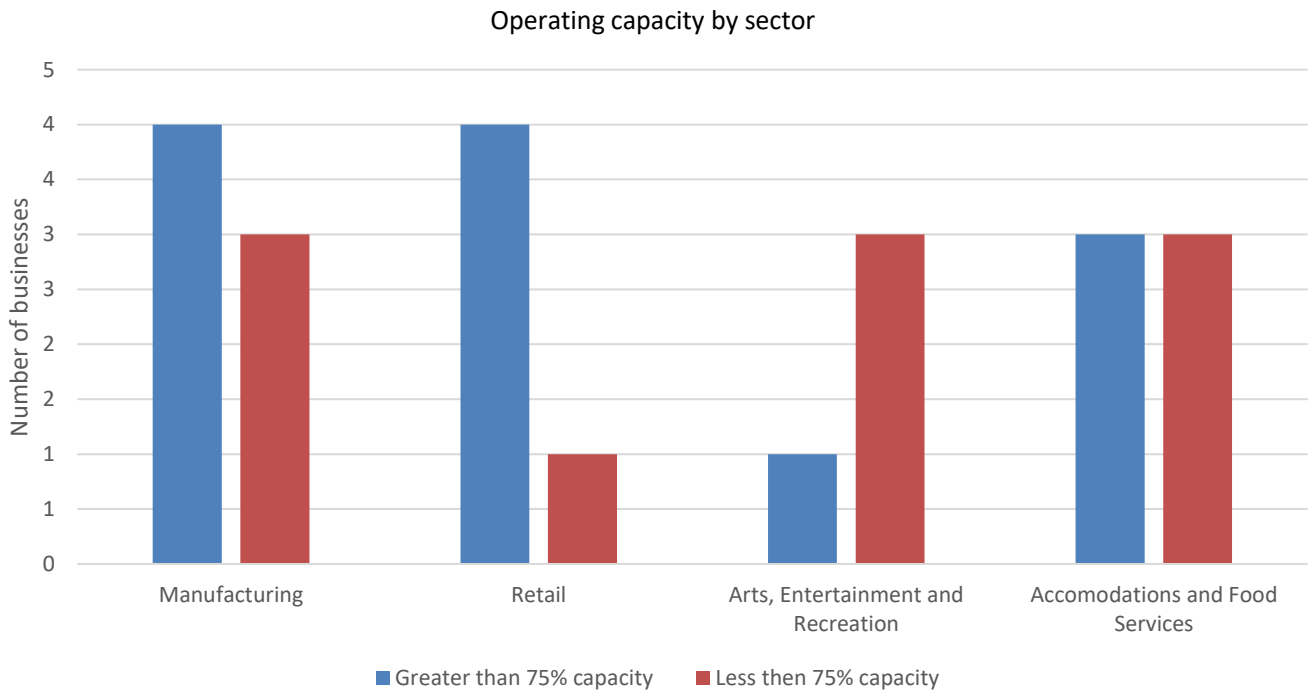
Operating Capacity

Sixty-three percent of businesses indicated that they were operating at 75% or better of their maximum capacity. Of the total respondents, 28% were operating at capacity of 100% or more.



While overall operational levels were positive, the results varied based on the sector. Manufacturing was generally performing well with 57% operating at greater than 75% capacity. Retailers surveyed were also performing well, with 80% operating at 75% capacity or more.

Capacity at Accommodations and Food Services businesses was split – 50% reported operating at or above 75% capacity, the others below. Arts, Entertainment and Recreation reported the greatest impact to capacity with 75% of respondents operating at less than 50% capacity.



Revenue

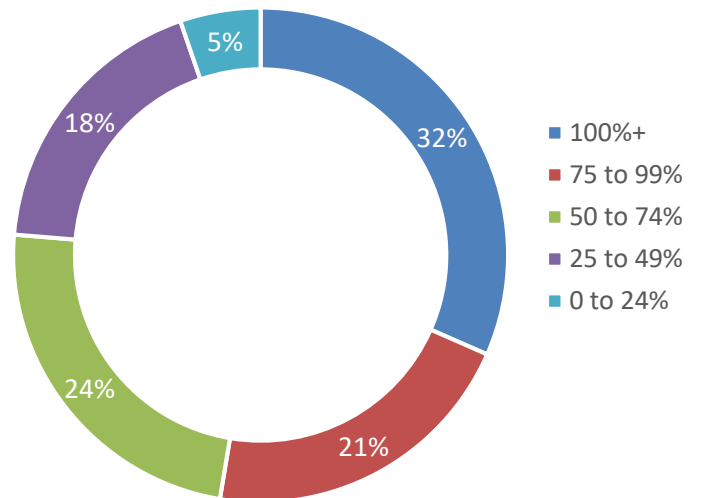
Like operating capacity, overall revenues generally told a positive story with 53% of business owners indicating that they were generating 75 to 100+ % of monthly revenues over the same time last year.

Again, the financial impact to tourism-related sectors was apparent. The majority of Arts, Entertainment and Recreation businesses (75%) indicated that revenues were 49% or lower than last year.

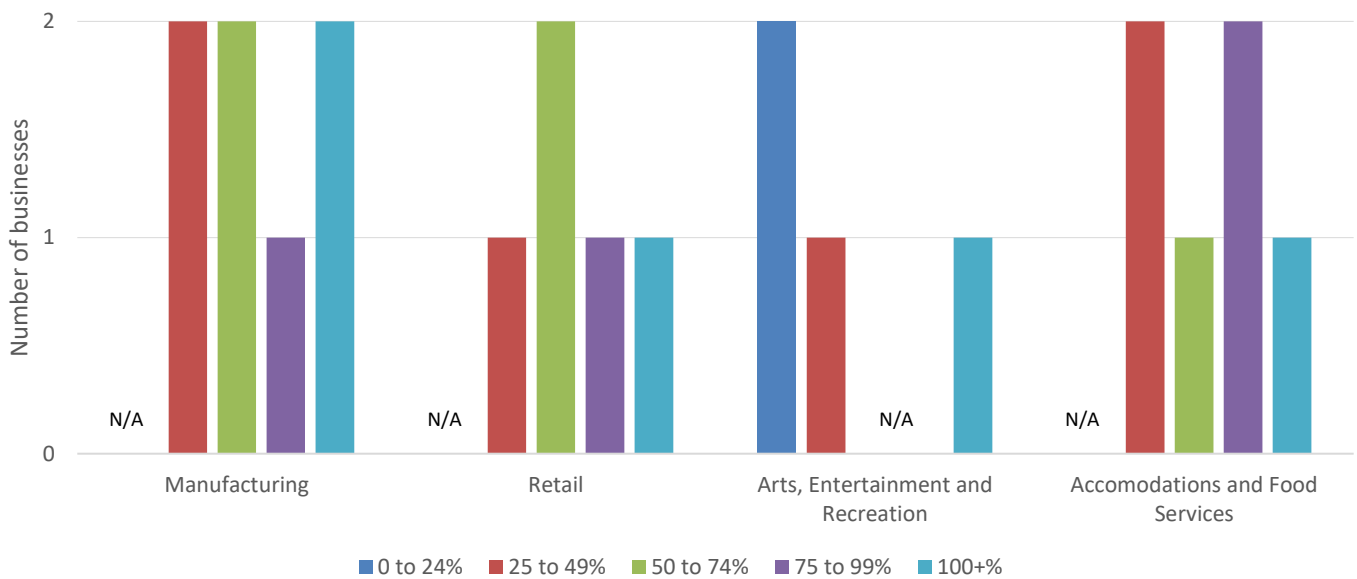
Revenue for Accommodations and Food Services businesses was split – 50% reporting revenues above 75% vs. the same time last year and the other half below.

Although retailers reported operating at higher capacities, their revenues have been impacted. Sixty percent reported revenues of less than 75% vs. last year.

Monthly revenue as percentage of 2019 monthly revenue



Revenue by sector



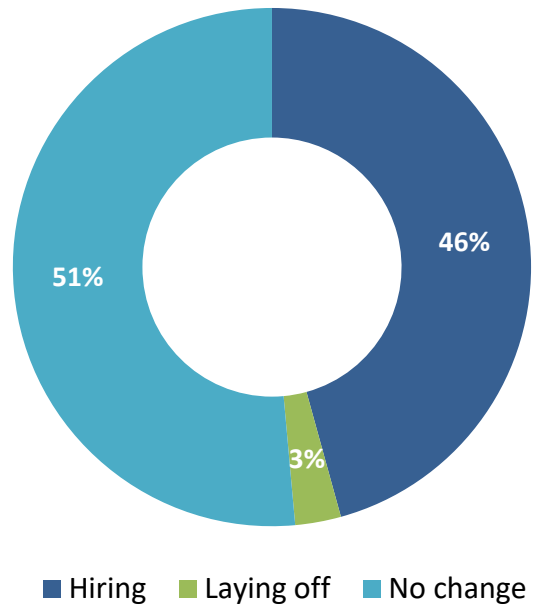
Workforce

Businesses were asked about changes to their workforce. The total number of employees pre-COVID compared to the total number of employees at the current time was 23% higher on average.

Fifty-one percent of businesses anticipated no changes to staffing within the next three months, 46% anticipated hiring, and one business (3%) indicated that there would be lay-offs (seasonal norm). The number of positions expected to be offered by hiring businesses was modest at 1 to 3 positions per business. Many indicated that positions being sought would involve customer service, online marketing (social media), and administrative skills.

The percentage of the workforce working remotely increased from 13% in February to 30% in June. However, most businesses did not expect a longer-term continuation of this style of work. Businesses indicated that approximately 17% of their workforce would continue working remotely once the COVID-19 pandemic is over.

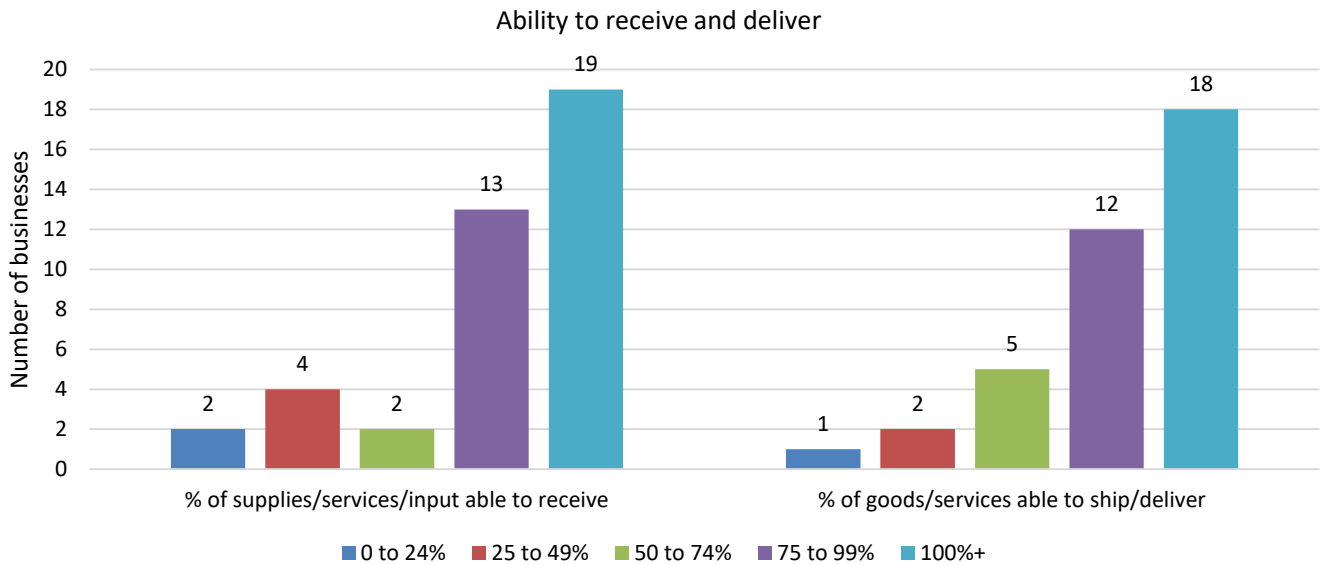
Staffing changes in next three months



Procurement and Sales

Fifty-five percent of respondents indicated that they were able to obtain the products they required to operate. Of the businesses experiencing procurement issues, the majority indicated challenges in obtaining PPE related products and supplies. Additional challenges identified were related to industry-specific needs such as specialty foods or other products imported from other countries as well as products impacted by manufacturing shut-downs in the early stages of the pandemic (ex. lumber).

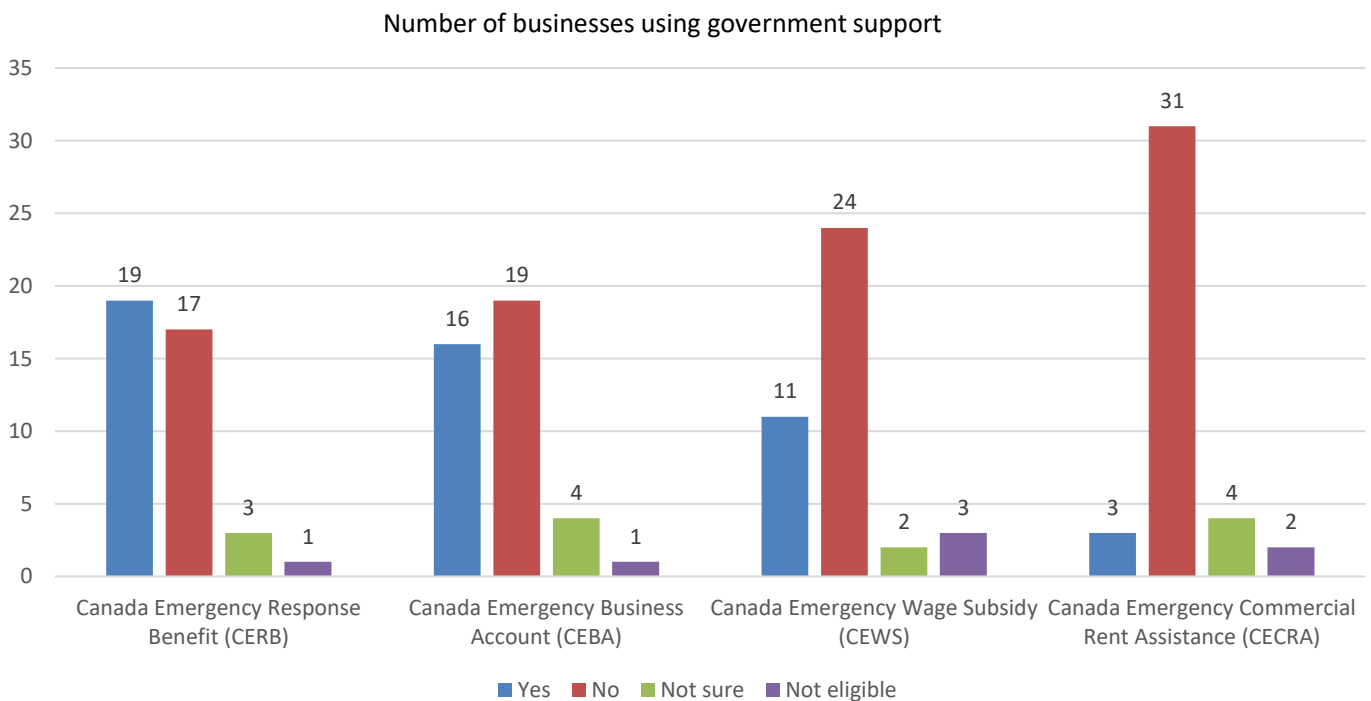
The majority of respondents (80%) have been able to receive 75 to 100% of the necessary supplies, services and inputs needed to conduct business. Their ability to ship and deliver goods and services was also generally not impacted – 79% of businesses indicated that they could ship/deliver 75% or more of their goods and services.



Respondents also indicated online sales revenues of approximately 10% in the period leading up to June 30, 2020. These businesses estimated online sales increasing to 20% in the future.

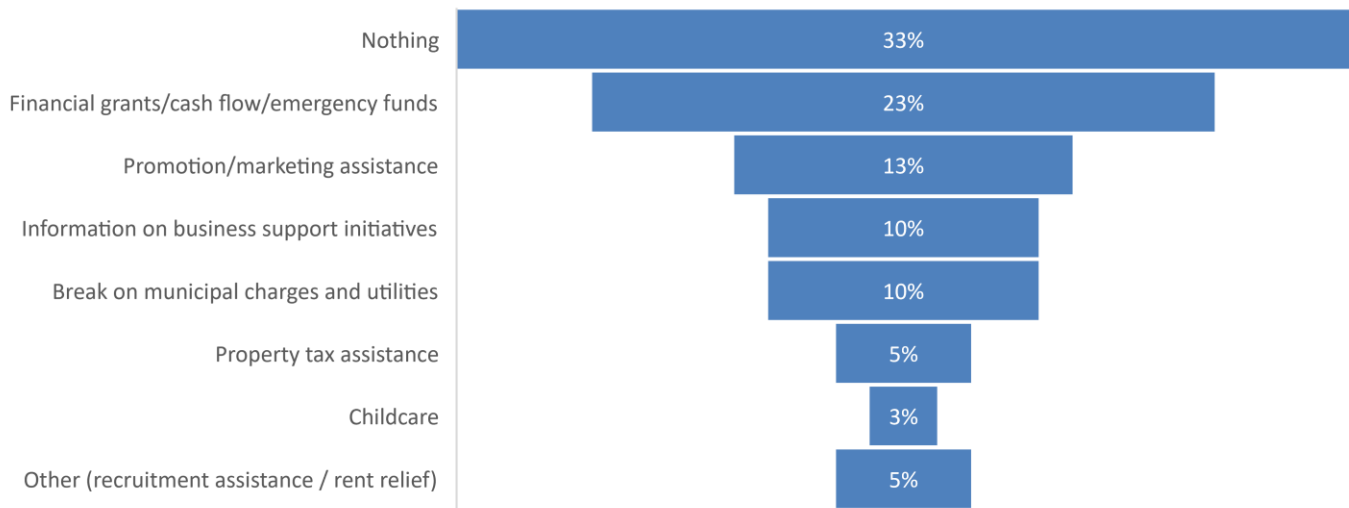
Business supports and needs

Of the financial support offered to businesses by the various levels of government, the Canada Emergency Response Benefit (CERB) and Canada Emergency Business Account (CEBA) have been the most widely used programs.



When asked what other support they currently require most, 33% of businesses indicated that no help was needed. Twenty-two percent were looking for financial grants and emergency funding.

Support required by local businesses



In general, most businesses (68%) said that they were receiving enough information on business supports. However, those who were interested were guided to resources offered by the Town’s Economic Development & Culture/SBEC office. Any specific questions or concerns were dealt with directly at time of meeting.

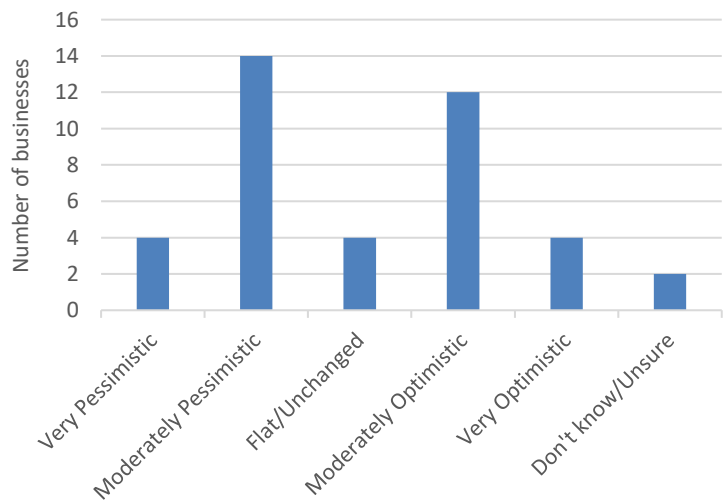
Business Outlook

Respondents were asked if the COVID-19 outbreak had changed their business outlook for 2020. There was a noticeable split in attitudes. Forty-five percent of businesses had a more pessimistic outlook while 40% had a more optimistic outlook.

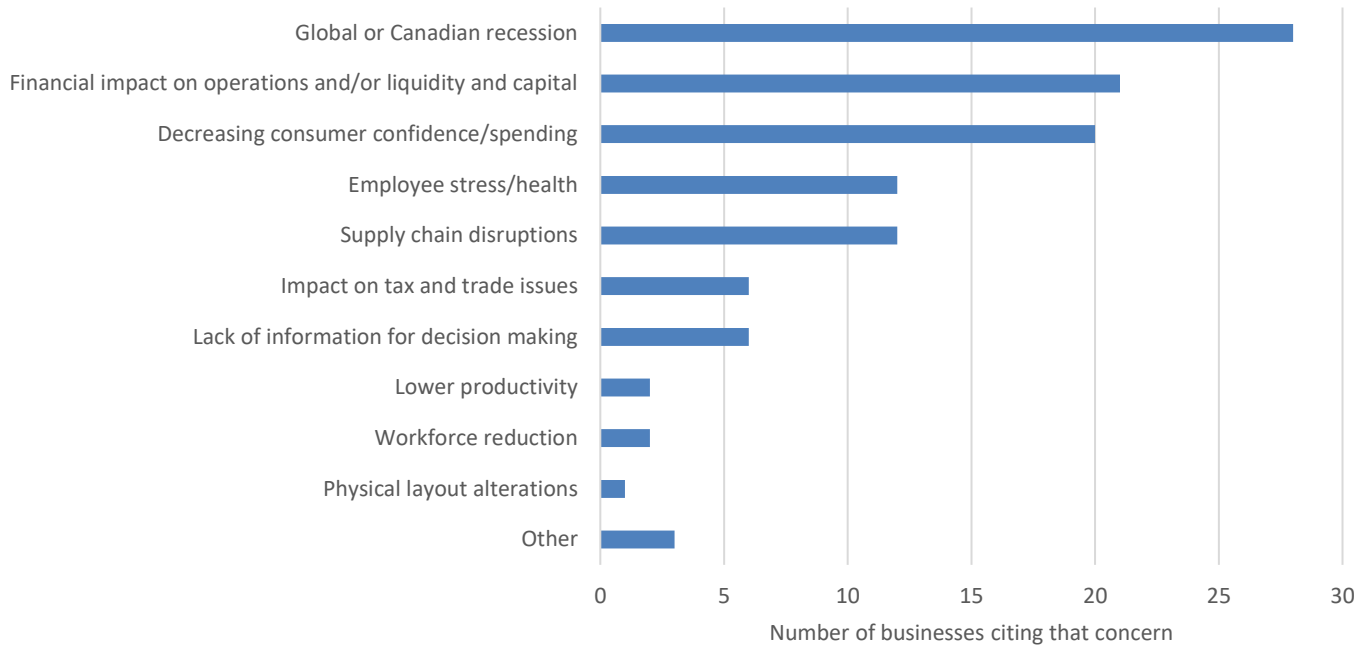
The top three concerns cited by respondents included:

- Global or Canadian recession
- Financial impact on operations and/or liquidity and capital
- Decreasing consumer confidence/spending

Business outlook for 2020



Top concerns looking forward



Respondents were asked to share what they thought could be the biggest economic opportunity for the community's recovery from COVID-19. Answers varied, but some common themes included:

- Encouraging residents and businesses to consider buying local from retailers, wholesalers, and service providers
- Supporting businesses as they adapt to new ways of doing business, particularly online sales and services
- Focusing on re-building tourism-related businesses

Other comments included:

- "The pandemic has pushed business owners to move digitally and think distantly. There is more opportunity to reach more people."
- "People are being more creative and thinking about business opportunities that they didn't have time to think about before when everything was rush, rush, rush."
- "Maintain an attractive and positive environment for consumers."
- "The pandemic has forced all of us to rethink how we provide service, how we demand service, and how we live our lives."
- "The Town focuses on the downtown core. More attention should be paid to businesses that aren't located downtown. Shop local, not just shop Broadway."
- "Focus on engaging local consumers. There is a lack of marketing education [among local business businesses]."
- "Need to push buying local with the community and make it [the community] understand the impact."
- "Take advantage of Orangeville's proudest assets (eg. most beautiful main street in Ontario) to attract visitors."

Finally, respondents were also asked to choose a few words to describe how they currently feel as a business owner. Again, results were quite varied, but a sense of cautious optimism was evident.

