



COVID-19

Manitoba Business Action Report

Phase 2: Business Revival (May 22 - June 2, 2020)

In partnership with:

 **The Chamber**
The Winnipeg Chamber of Commerce

Leger

Pandemic Business Revival Survey Report



2020-06-
08



CONTEXT AND OBJECTIVES

Context

With the COVID-19 situation public health situation improved, the provincial government has announced a phased return-to-work plan. While many businesses have remained open throughout the pandemic, some are re-opening and still others are opening in future phases. Businesses still need support as they navigate operating during a pandemic, and working towards recovery.

The Manitoba Chambers of Commerce and The Winnipeg Chamber of Commerce look to understand the operational state of businesses in order to support plans to accelerate restoration of robust economic activities in the province.

Objectives

The objectives of this study are to understand the current state of Manitoba businesses, the challenges as they return to restoring services, the awareness and use of government relief programs, and areas in which Chambers of Commerce can advocate on behalf of their membership.

For this purpose, Manitoba Chambers of Commerce and The Winnipeg Chamber of Commerce jointly commissioned a membership survey. The results provide a statistically sound reading on the business challenges and support expectations in Manitoba.



METHODOLOGY

Data Collection

- A total of n=344 online surveys were conducted by sending survey links to members via email.
- Data was collected from May 22 to June 02, 2020.

Target Respondents

- Members of Manitoba Chambers of Commerce and The Winnipeg Chamber of Commerce were included in the survey.

Margin of Error

- As a non-probability sample internet survey, a margin of error is technically not to be reported.
- If the data were collected through a random sample of businesses, the margin of error would be $\pm 5.0\%$, 19 times out of 20. The confidence interval decreases when examining subsets of the total sample.
- The numbers presented have been rounded to the nearest whole number. However, raw values were used to calculate the sums presented and therefore may not correspond to the manual addition of these numbers.



Detailed Results

Results

- **Current state of businesses:** While 20% of business in Manitoba are still waiting to open, over two-thirds of businesses never closed during the lockdown and 12% of the businesses have recently opened their operations.
 - Over 85% of medium-large businesses (over 50 employees) stayed open during the pandemic vs. 62% small businesses (1-10 employees). Restaurants/ Tourism/Hospitality and Non-profit/Arts and Culture industries were most affected by the pandemic as over one-third of these are still closed temporarily.
 - In terms of impact on operations, six in 10 businesses saw a decline in operations from last year. Consumer/Retail/Services industries were most affected, three in 10 of these have reported 70% lower operational activity compared to last year.
 - Despite weak operations across businesses, only 1% are considering CCAA.
 - Half of the businesses feel they will be able to recover from the losses in over a year, while around 16% are uncertain their operations can ever reach pre-pandemic levels again, more so in Restaurant/Hospitality/ Tourism (31% uncertain).
- **Business Challenges:** Managing short term liquidity is the major operational challenge among businesses, especially small and medium sized, as over 40% businesses mentioned it as their top concern. Medium large industries also have travel restrictions and managing facilities as their major concerns.
 - Around 60% of the businesses are also concerned about change in customer behaviour/shift in demand. Among employee/ HR challenges, employee safety and wage support are major concerns across industries. One third of Restaurant/ Hospitality/ Tourism industry is also concerned about workforce replenishment/labour shortage.

Results

- **Awareness and utilization of government relief funds:** Almost all businesses in Manitoba (96% - 98%) are aware of Canada Emergency Wage Subsidy (CEWS), Canada Emergency Business Account (CEBA) and half of the aware businesses have also subscribed to the benefits. Among the individual benefit programs, deferred income tax returns has highest awareness (98% aware), followed by Employment Insurance (96%) and the Canada Emergency Response Benefit (94% aware).
- **Changes in business operations:** Businesses have most commonly re-organized their workforce by allowing work from home (39% of businesses), especially businesses in Winnipeg (51%). The next highest change was technology upgrades. In terms of information to help them manage changes to their operations, around 80% of businesses feel health and safety codes for employees and public is important information for them to work in this new business situation.
- **Assistance expectations:** Over half of the companies look forward to getting continued information on changing regulations and around four in 10 businesses believe that financial assistance would be most important for them to be able to return to work successfully. Apart from getting updates on government policies, regulations and programs (56%), businesses also expect organizations such as Manitoba Chambers of Commerce and The Winnipeg Chamber of Commerce to continue to lobby governments to keep up the support for businesses (53%).
 - When asked about their thoughts on getting Manitoba's economy back on track, four in 10 business leaders recommend the provincial government "invest in healthcare infrastructure to mitigate potential disruptions from a second surge in pandemic cases", while a third of businesses suggest "supporting local tourism" as well as "reducing regulations."



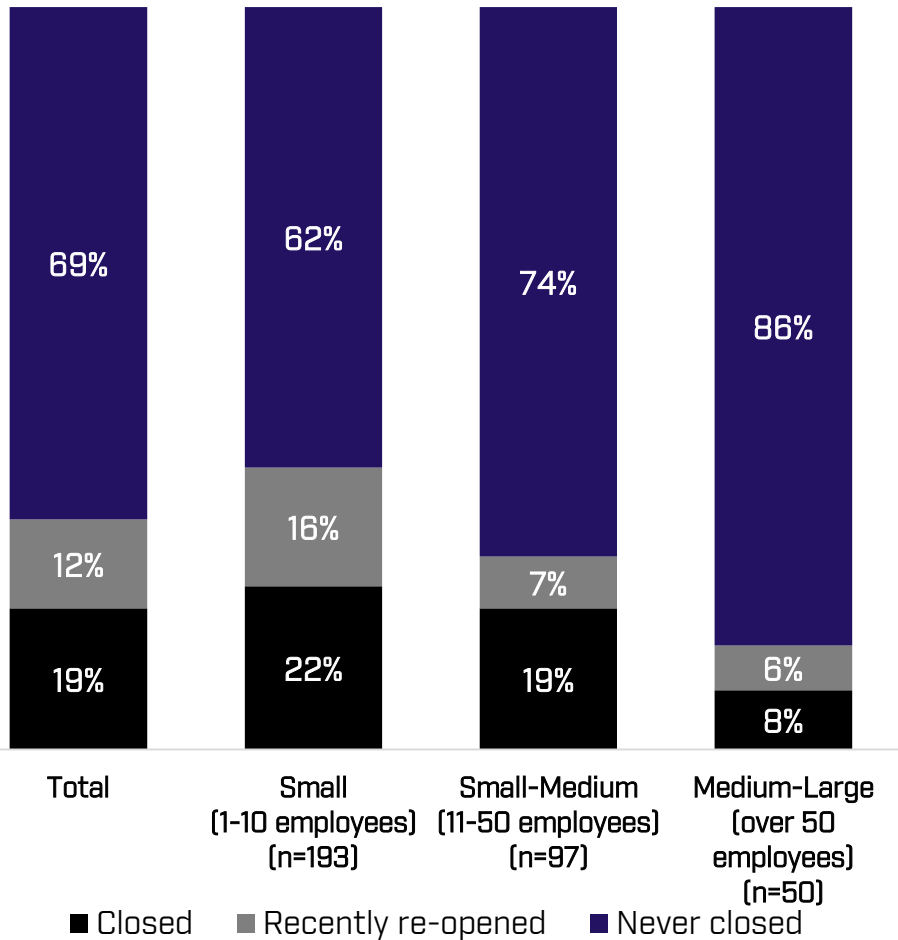
Current State of Businesses

Current State of Businesses

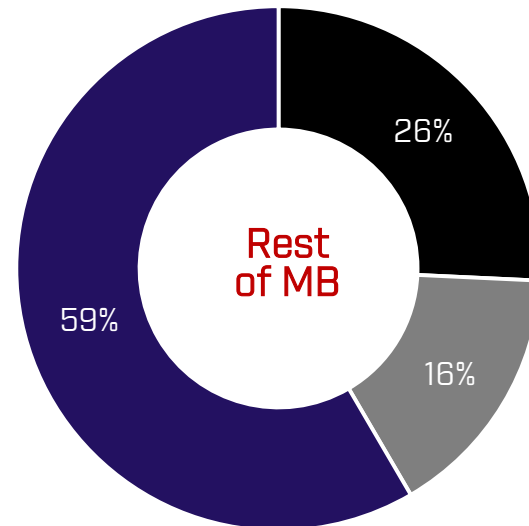
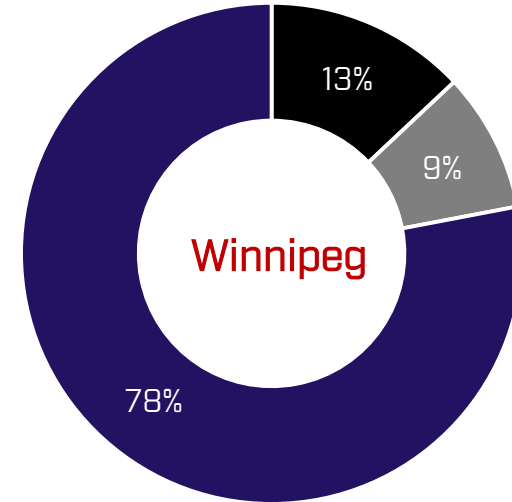
Q1B: What best describes your business situation currently?

QEMP What size is your business?

Base : Manitoba Chambers of Commerce & The Winnipeg Chamber of Commerce Members (n=344)



Recall that ~30% of small and 15% of medium-large businesses expected high impact when contacted in March.



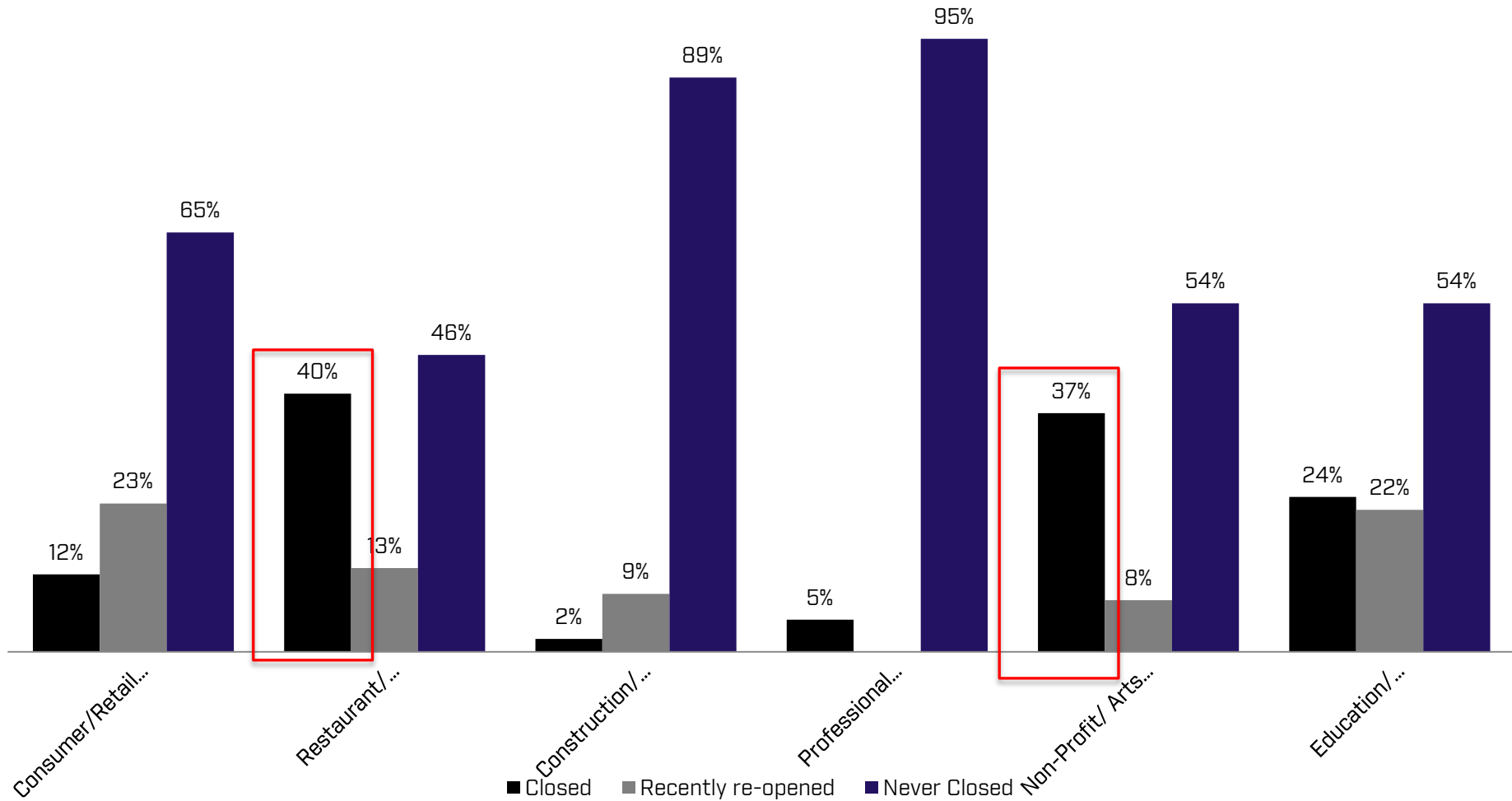
Current state of Businesses – By Industry Type

Q1: Which of the following best describes the principal activity/industry of your organization?

Q1B: What best describes your business situation currently?

QEMP What size is your business?

Base : Manitoba Chambers of Commerce & The Winnipeg Chamber of Commerce Members (n=344)



Business Operations vs. Last Year – by Industry Type

Q2: Thinking about the impact of COVID-19 pandemic on your business, how would you describe the state of your operations currently compared to the same period last year?

Q1: Which of the following best describes the principal activity/industry of your organization?

Base : Manitoba Chambers of Commerce & The Winnipeg Chamber of Commerce Members (n=344)

Business Impact	Total	Consumer/ Retail/ Services	Restaurant/ Hospitality/ Tourism/ Recreation	Construction/ Manufacturing/ Agriculture/ Transportation	Professional Services/ Technology/ Communications	Non-profit/ Associations/ Arts and Culture	Education/ Healthcare/ Government/ Public Admin
Shut down operations temporarily	11%	9%	29%	-	4%	17%	14%
Lower than last year	64%	72%	62%	54%	64%	61%	68%
~70 lower	26%	31%	35%	15%	19%	36%	24%
~50 lower	19%	12%	19%	19%	18%	24%	24%
~30 lower	18%	29%	8%	20%	27%	2%	19%
Same to minimally changed	17%	12%	6%	31%	23%	17%	14%
Higher than last year	6%	3%	4%	15%	7%	5%	3%
~30% higher	4%	3%	4%	9%	5%	2%	3%
~50% higher	1%	-	-	6%	1%	-	-
~70% higher	1%	-	-	-	-	3%	-

Business Operations vs. Last Year – by Industry size

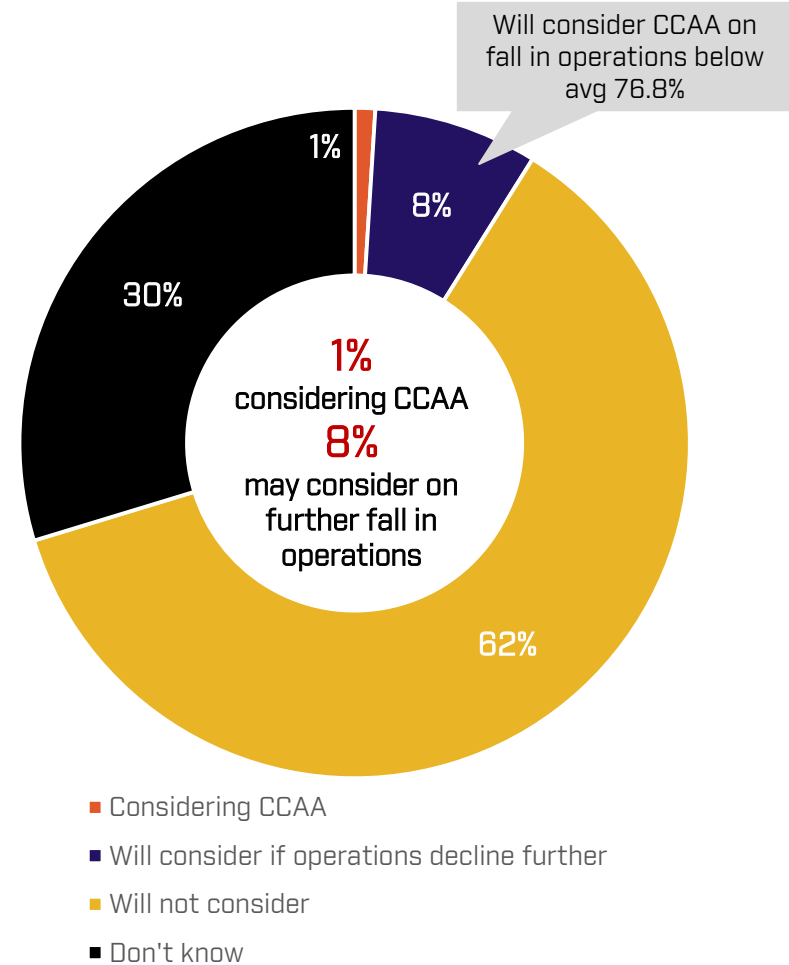
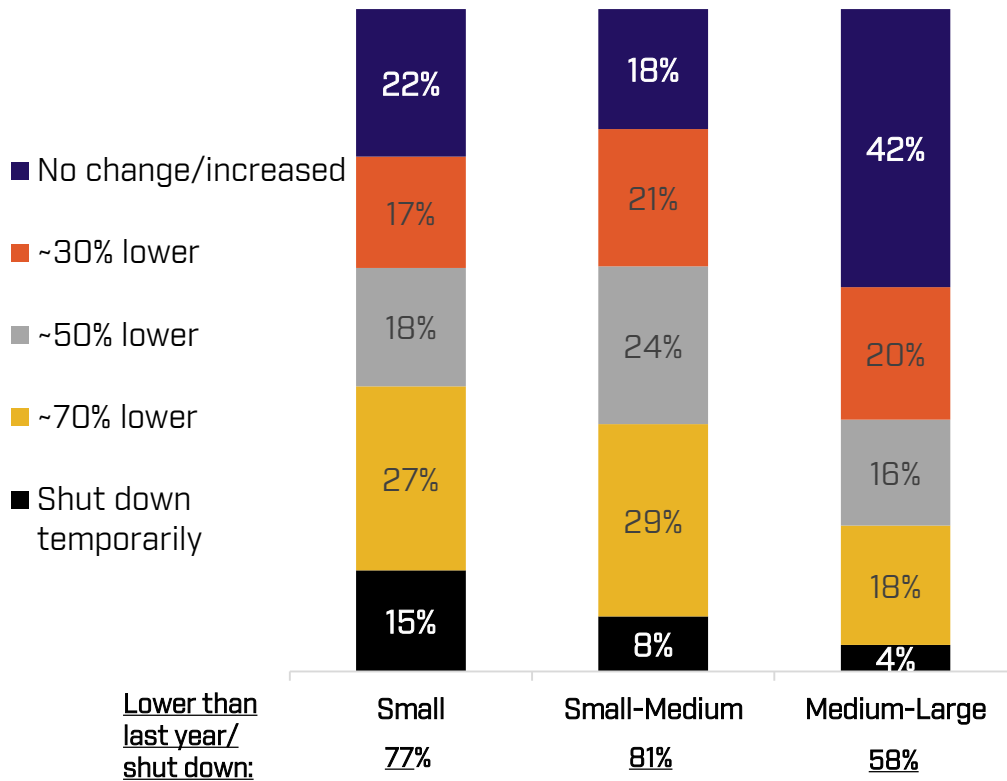
Q2: Thinking about the impact of COVID-19 pandemic on your business, how would you describe the state of your operations currently compared to the same period last year?

QEMP What size is your business?

Base : Manitoba Chambers of Commerce & The Winnipeg Chamber of Commerce Members (n=344)

Q2A: Are you considering invoking the Companies' Creditors Arrangement Act (CCAA)/ close operation? Please provide a percent estimate of decline to consider invoking CCAA.

Base : Manitoba Chambers of Commerce & The Winnipeg Chamber of Commerce Members (n=196), operations lower than 50%



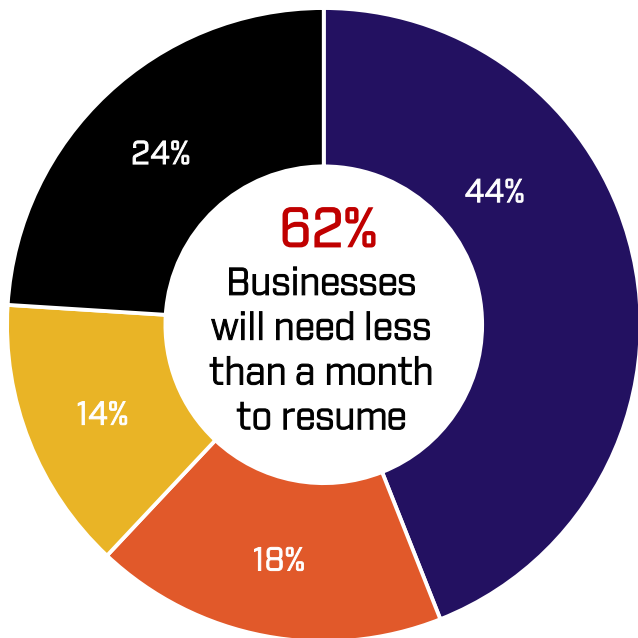
Impact is more on Winnipeg businesses: 8% of Winnipeg businesses are shut down vs 16% in Rest of MB; 31% Winnipeg businesses saw over 70% fall in operations vs 21% of business in Rest of MB.

Time Required to Resume Operations

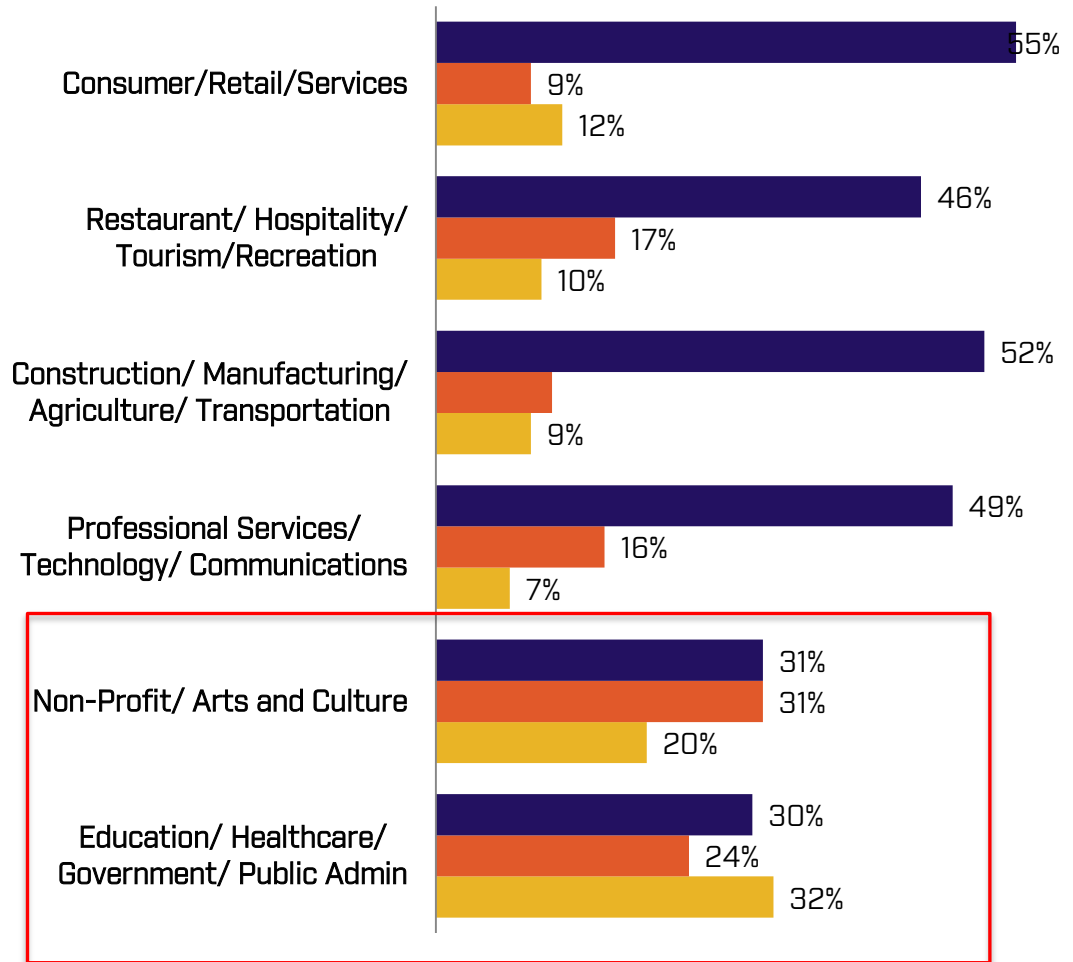
Q5. Whether you have been allowed to re-open or still waiting to re-open, how much time will you need to properly resume business operations? Will you need..

Q1: Which of the following best describes the principal activity/industry of your organization?

Base : Manitoba Chambers of Commerce & The Winnipeg Chamber of Commerce Members (n=344)



■ A week or less ■ 2 to 3 weeks
 ■ A month or more ■ Don't know



■ A week or less ■ 2-3 weeks ■ A month or more

25% of the businesses shut down or working on less than 70% of operations expect to need more than a month vs. 7% of businesses in better state of operations

Time to reach pre-pandemic operations level – by Industry Size

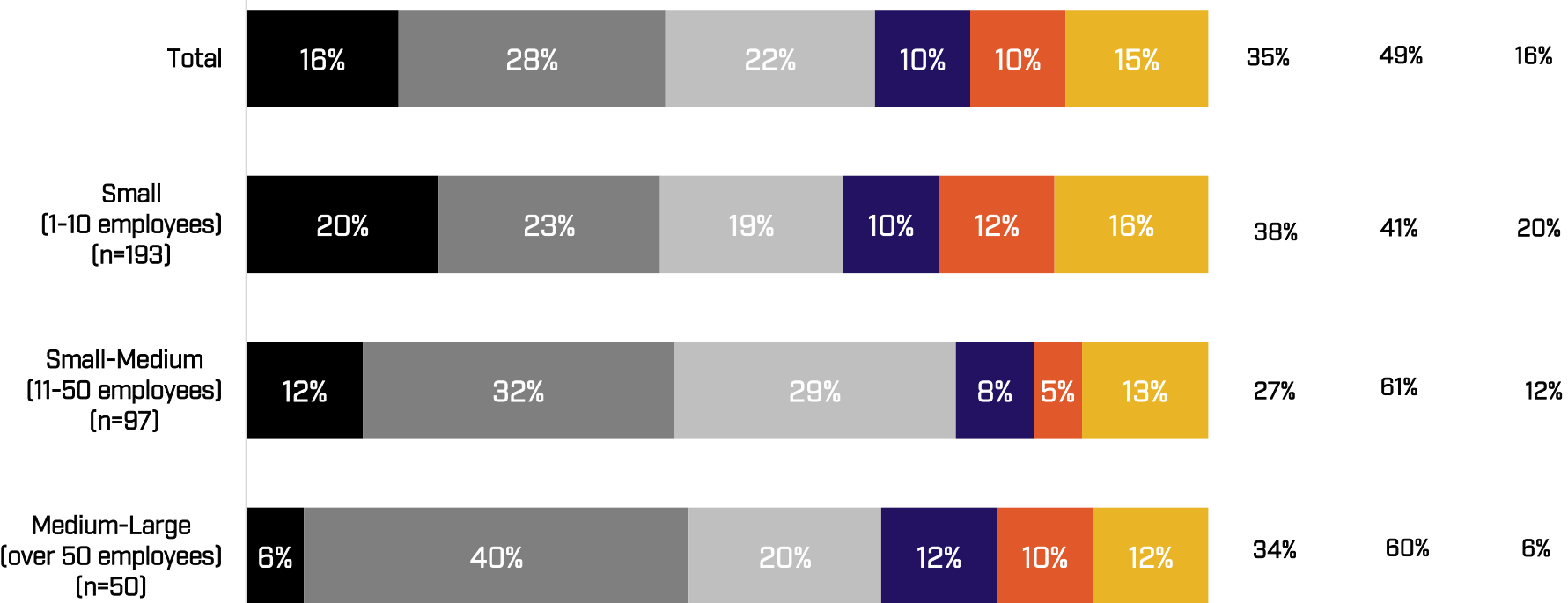
Q6: How long do you think it would take your business to reach the pre-pandemic (its usual) state of operations?

QEMP What size is your business?

Base : Manitoba Chambers of Commerce & The Winnipeg Chamber of Commerce Members (n=344)

Less than 6 Months More than 6 Months Unsure Ever reaching

Uncertain ← ----- ► Immediately



- Unsure ever reaching
- More than 1 year
- 6 months to 1 year
- 4-6 months
- 1-3 months
- Immediately/Within few weeks

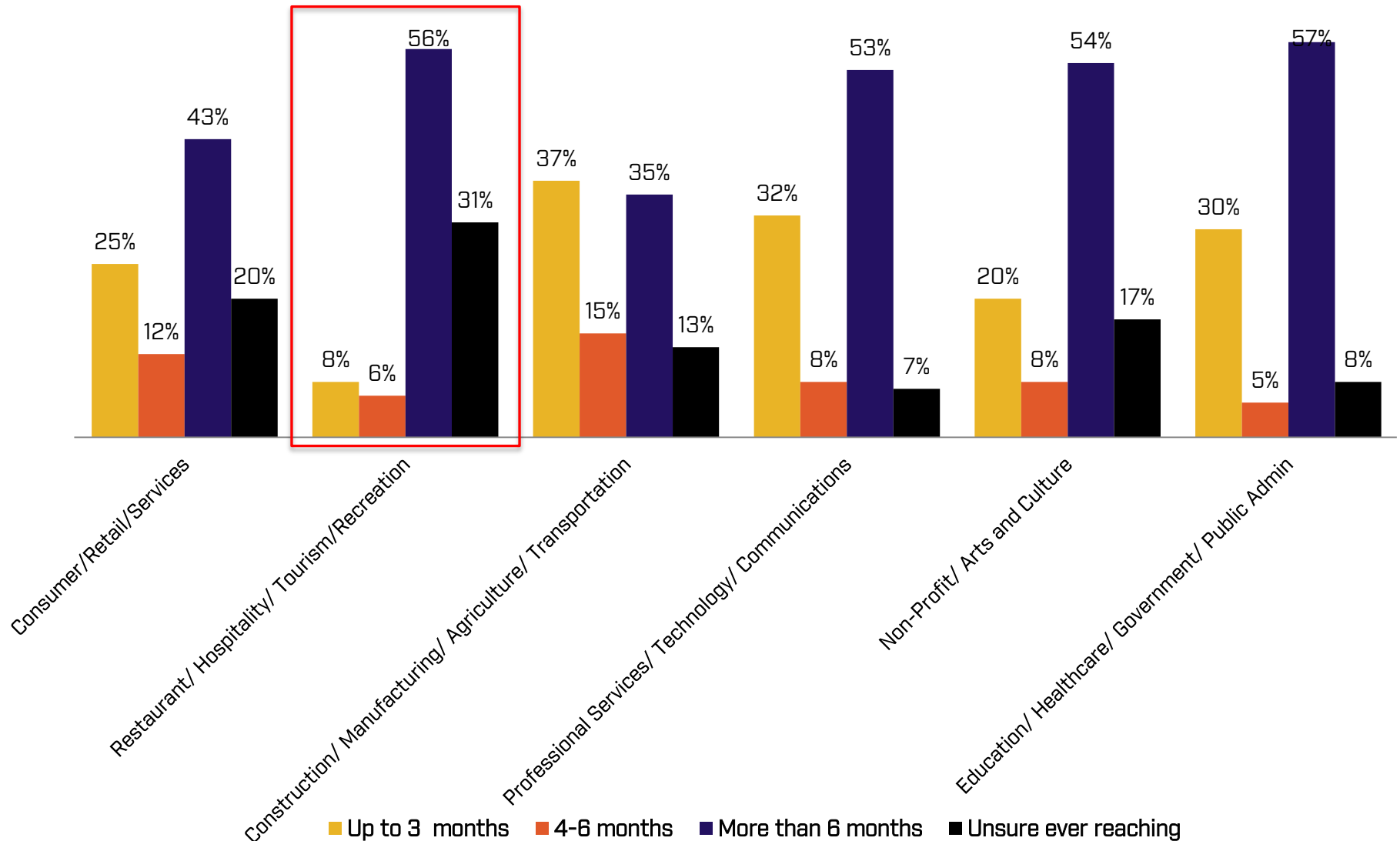
- 31% of Winnipeg business expect recovery to take more than a year vs 21% of businesses outside Winnipeg.
- 25% of business in rest of MB are unsure whether they will ever reach pre-pandemic levels, vs. 8% of Winnipeg businesses.
- Regardless, this uncertainty is highest in businesses temporarily shut down or running at less than 70% of operations (25% vs 10% for businesses at higher level of operations)

Time to reach pre-pandemic operations level – by Industry Type

Q6: How long do you think it would take your business to reach the pre-pandemic (its usual) state of operations?

Q1: Which of the following best describes the principal activity/industry of your organization?

Base : Manitoba Chambers of Commerce & The Winnipeg Chamber of Commerce Members (n=344)





Return to Work Challenges

Financial/Operational Challenges

Q7: Please select two major concerns/challenges for your business in each category.

Base : Manitoba Chambers of Commerce & The Winnipeg Chamber of Commerce Members (n=344)



Financial/Operational Challenges- by Industry Size

Q7: Please select two major concerns/challenges for your business in each category.

Base : Manitoba Chambers of Commerce & The Winnipeg Chamber of Commerce Members (n=344)

Financial/Operational Challenges	Winnipeg	Rest of MB	Medium-Large	Small-Medium	Small
Short-term liquidity: cash flow/Bank or Credit support	41%	38%	20%	44%	42%
Debt repayment/deferral/forgiveness	21%	28%	12%	24%	27%
Border/travel restrictions	21%	23%	30%	24%	19%
Facilities management: remodeling/cleaning/landlord viability	21%	16%	28%	21%	16%
Legal concerns/managing regulatory liabilities	10%	15%	8%	13%	12%
Supply chain: near-shore/scale-up/quality control	13%	11%	14%	18%	8%
Transportation & Logistics: maintain stock/personnel/warehousing	11%	9%	12%	12%	7%
Vendor management: Vendor credit/capital & operating supports	7%	8%	8%	9%	7%
Enforcing new healthy and safety policies (including social distancing, PPE, sick pay, etc.)	6%	2%	-	4%	5%
Gaining consumer confidence back/Consumer Demand	5%	1%	6%	1%	4%
Growing or building new business	2%	1%	2%	2%	1%
Staff not willing to come back to work/Currently receiving CERB	1%	2%	-	3%	1%
No major concern	10%	16%	14%	6%	16%

Financial/Operational Challenges – by Industry Type

Q7: Please select two major concerns/challenges for your business in each category.

Base : Manitoba Chambers of Commerce & The Winnipeg Chamber of Commerce Members (n=344)

Industry Type	Financial and operational Challenges
Consumer/ Retail/Services	<ul style="list-style-type: none"> • Short-term liquidity: cash flow/Bank or Credit support (51%) • Debt repayment/deferral/forgiveness (34%) • Border/ travel restrictions (14%) • No major concern (12%) • Supply chain: near-shore/scale-up/quality control (12%)
Restaurant/ Hospitality/ Tourism/ Recreation	<ul style="list-style-type: none"> • Debt repayment/deferral/forgiveness (46%) • Short-term liquidity: cash flow/ Bank or Credit support (42%) • Border/ travel restrictions (37%) • Facilities management: remodeling/cleaning/landlord viability (15%) • Supply chain: near-shore/scale-up/quality control (10%)
Construction/ Manufacturing/ Agriculture/ Transportation	<ul style="list-style-type: none"> • Short-term liquidity: cash flow/ Bank or Credit support (31%) • Transportation & Logistics: maintain stock/personnel/ warehousing (26%) • Border/ travel restrictions (24%) • Debt repayment/deferral/forgiveness (20%) • Supply chain: near-shore/scale-up/quality control (20%)
Professional Services/ Technology/ Communications	<ul style="list-style-type: none"> • Short-term liquidity: cash flow/ Bank or Credit support (36%) • No major concern (23%) • Border/ travel restrictions (19%) • Debt repayment/deferral/forgiveness (18%) • Facilities management: remodeling/cleaning/landlord viability (15%)
Non-profit/ Associations/ Arts and Culture	<ul style="list-style-type: none"> • Short-term liquidity: cash flow/Bank or Credit support (46%) • Facilities management: remodeling/cleaning/landlord viability (34%) • Border/ travel restrictions (19%) • No major concern (12%) • Legal concerns/managing regulatory liabilities (10%)
Education/ Healthcare/ Government/ Public Admin	<ul style="list-style-type: none"> • Facilities management: remodeling/cleaning/landlord viability (32%) • Legal concerns/managing regulatory liabilities (32%) • Short-term liquidity: cash flow/ Bank or Credit support (27%) • Border/ travel restrictions (24%) • Debt repayment/deferral/forgiveness (16%)

Employee/Human resource challenges

Q7: Please select two major concerns/challenges for your business in each category.

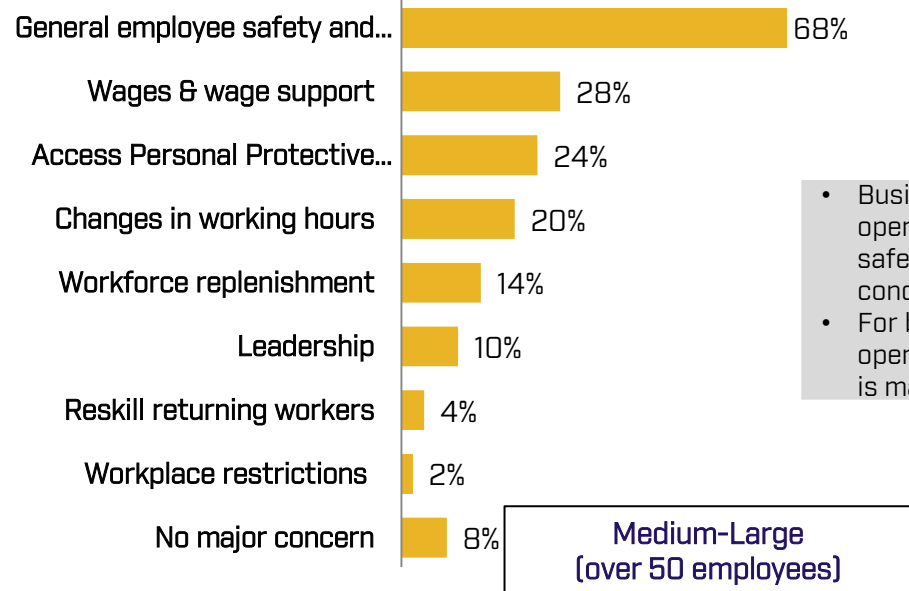
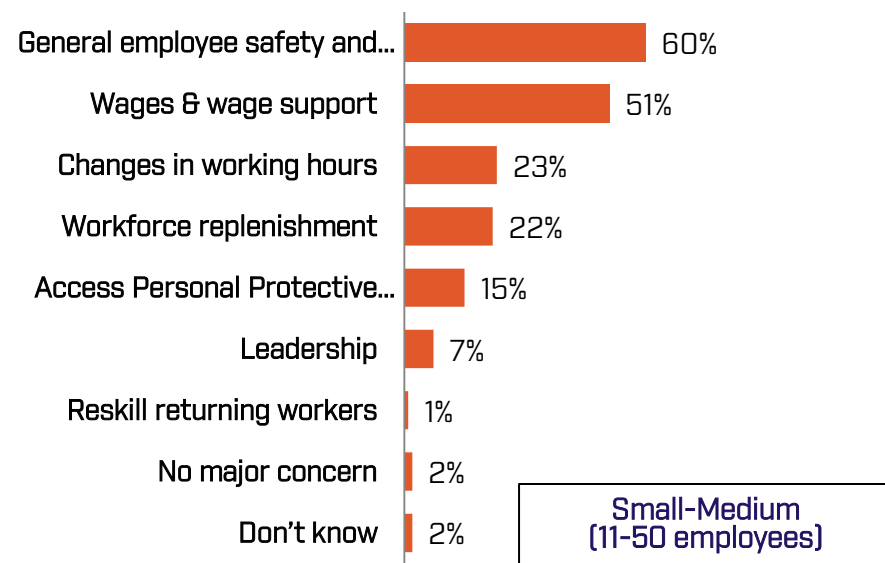
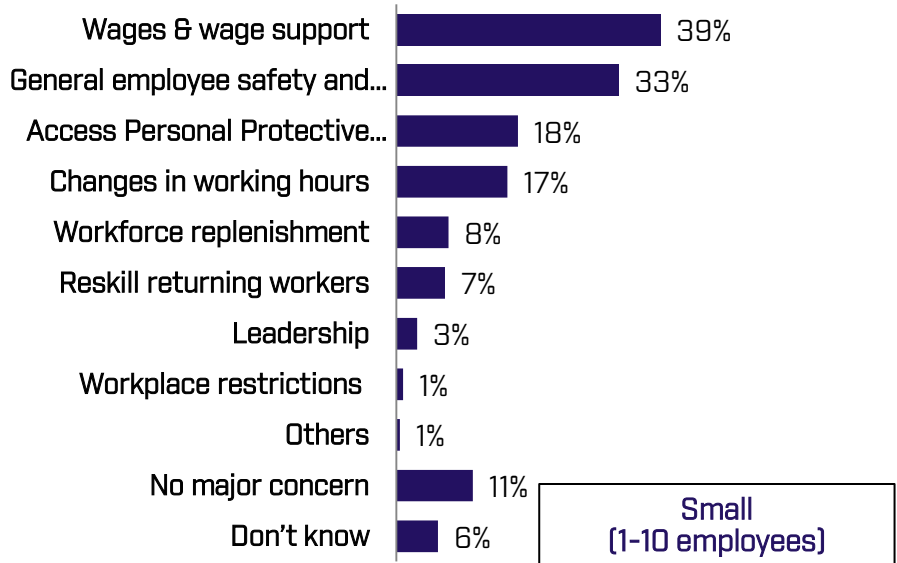
Base : Manitoba Chambers of Commerce & The Winnipeg Chamber of Commerce Members (n=344)



Employee/Human resource challenges – by Industry Size

Q7: Please select two major concerns/challenges for your business in each category.

Base : Manitoba Chambers of Commerce & The Winnipeg Chamber of Commerce Members (n=344)



- Businesses with no change/increased operations have general employee safety as their major concern (58% concerned).
- For businesses with reduced operations, wages and wage support is major concern (50% concerned)

Employee/Human resource challenges – by Industry Type

Q7: Please select two major concerns/challenges for your business in each category.

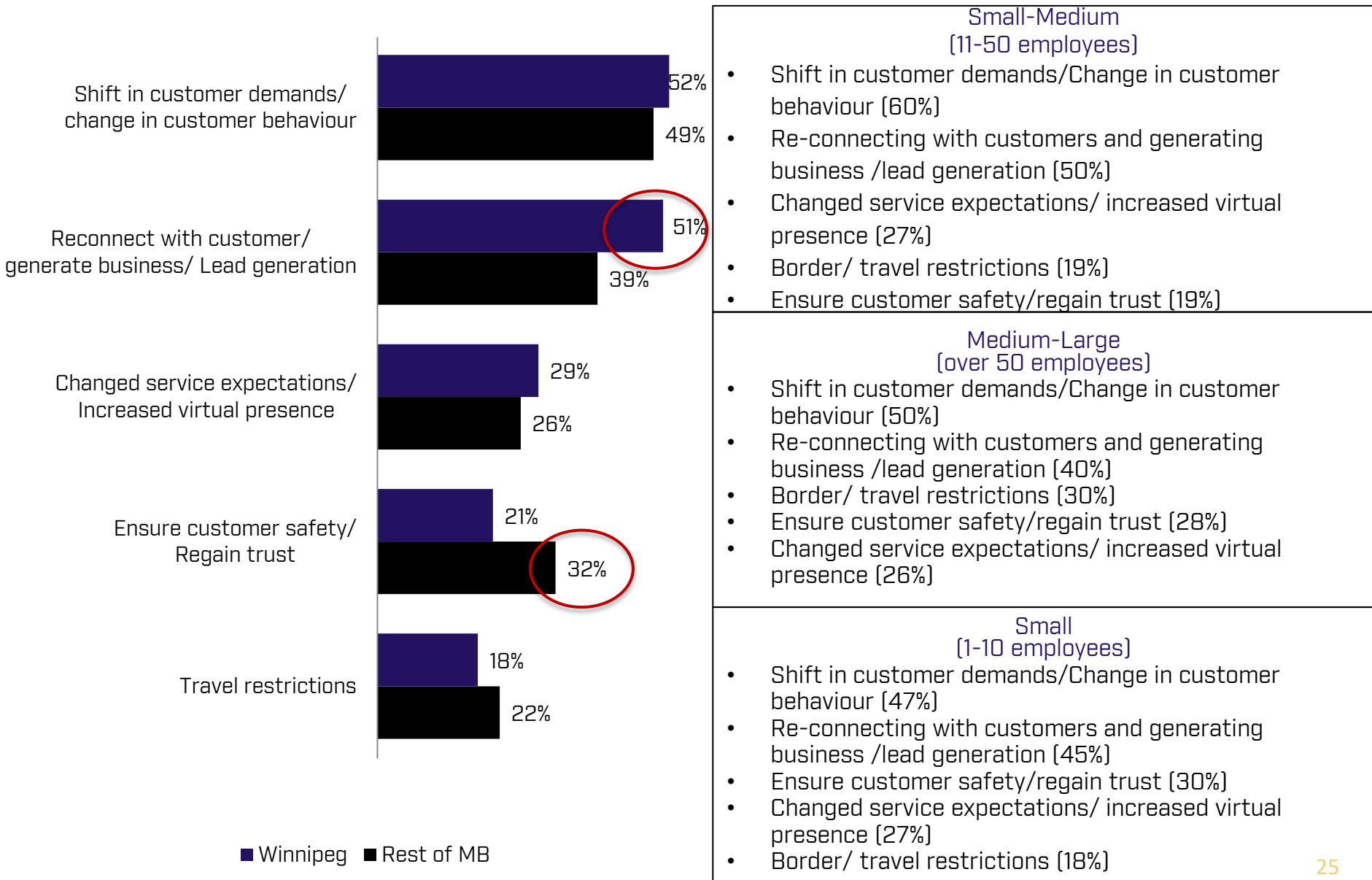
Base : Manitoba Chambers of Commerce & The Winnipeg Chamber of Commerce Members (n=344)

Human resources challenge	Consumer/ Retail/ Services	Restaurant/ Hospitality/ Tourism/ Recreation	Construction/ Manufacturing/ Agriculture/ Transportation	Professional Services/ Technology/ Communications	Non-profit/ Associations/ Arts and Culture	Education/ Healthcare/ Government/ Public Admin
Wages & wage support	42%	46%	43%	33%	46%	41%
General employee safety and health/ employee well-being program	35%	50%	39%	47%	54%	54%
Changes in working hours/defining over-time	22%	10%	20%	25%	20%	14%
Access Personal Protective Equipment	9%	6%	19%	18%	15%	54%
Workforce replenishment/labour shortage	6%	31%	17%	7%	8%	11%
New skills required for returning workers	5%	4%	2%	4%	10%	5%
Leadership	2%		6%	8%	10%	5%
Workplace restrictions (working remotely, travel restrictions, etc.)	-	-	-	1%	3%	-
No major concern	22%	15%	17%	21%	7%	-
Don't know	9%	8%	6%	-	-	-

Customer/Business development challenges – by Industry Size

Q7: Please select two major concerns/challenges for your business in each category.

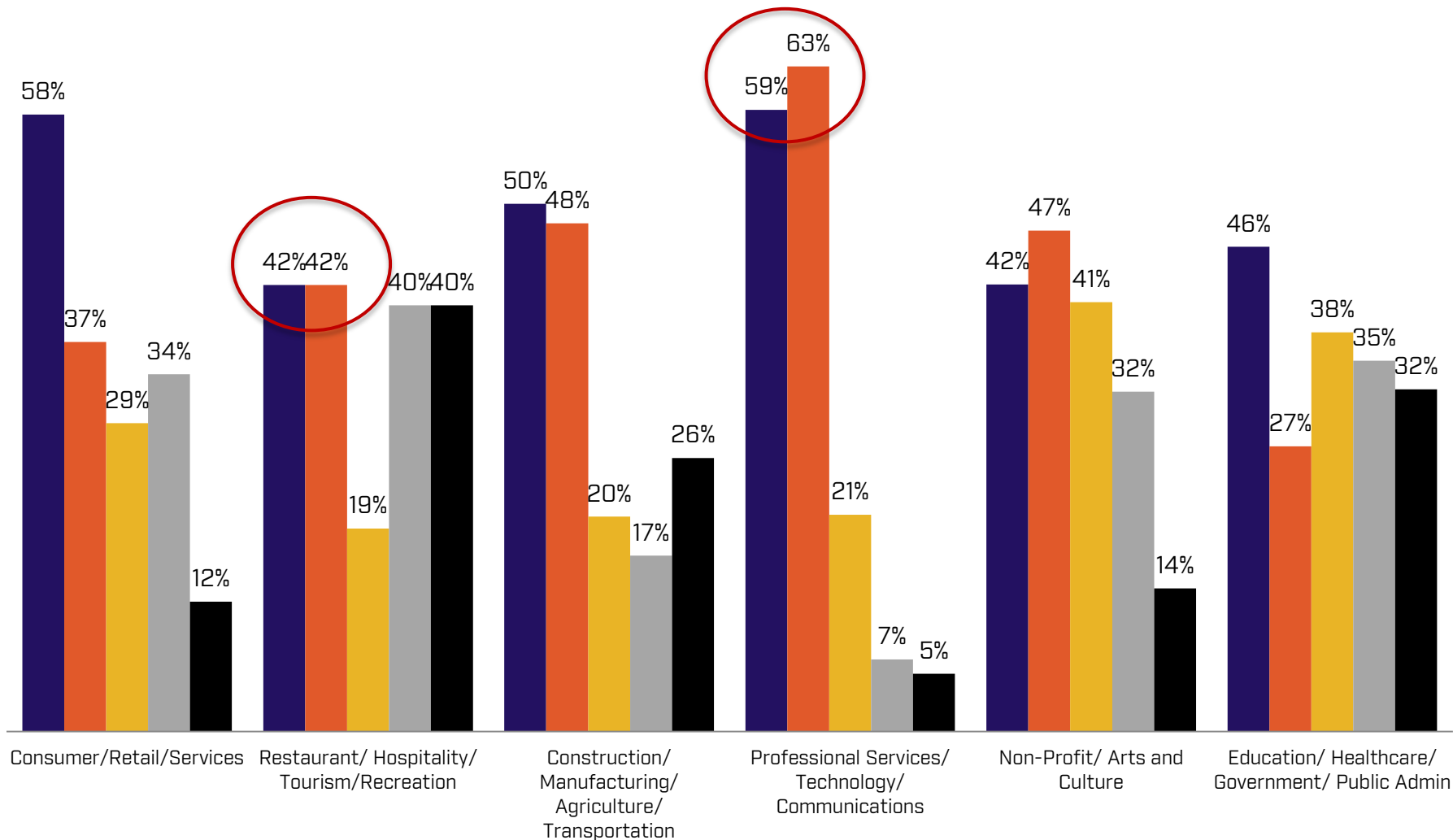
Base : Manitoba Chambers of Commerce & The Winnipeg Chamber of Commerce Members (n=344)



Customer/Business development challenges – by Industry type

Q7: Please select two major concerns/challenges for your business in each category.

Base : Manitoba Chambers of Commerce & The Winnipeg Chamber of Commerce Members (n=344)



■ Shift in customer demands ■ Lead generation ■ Changed service expectations ■ Regain trust ■ Border/ travel restrictions



Awareness – Government Relief Funds

Government Business Support Plans – Awareness

Q3: Federal and provincial governments have announced multiple COVID-19 support plans for the businesses. Which of the following support plans are you aware of/applied to or received benefits for?

Base : Manitoba Chambers of Commerce & The Winnipeg Chamber of Commerce Members (n=344)

Relief funds	Total Aware	Total Unaware	Total Applied	Applied			Not Applicable
				Received	Not received	Denied	
Canada Emergency Wage Subsidy - 75% [CEWS]	98%	2%	40%	32%	7%	1%	29%
Canada Emergency Commercial Rent Assistance [CECRA]	94%	6%	8%	-	6%	2%	48%
10% Temporary Wage Subsidy for Employers	93%	7%	34%	30%	4%	-	33%
Canada Emergency Business Account [CEBA]	92%	8%	40%	34%	4%	1%	28%
Support for Indigenous businesses	91%	9%	<1%	<1%	-	-	77%
Reduced and Deferred - Income /Sales /Customs duty payments	90%	10%	18%	15%	3%	1%	35%
Summer Student Recovery Program	89%	11%	9%	4%	4%	1%	43%
Temporary Foreign Workers Program	89%	11%	-	-	-	-	73%
Temporary Changes to the Canada Summer Jobs Program	85%	15%	13%	5%	7%	1%	43%
Food Supply and Agri Recovery Support Initiatives	85%	15%	1%	1%	-	-	72%
Extended Workshare Program	81%	19%	3%	1%	1%	-	49%
Business Credit Availability Program [BCAP]	76%	24%	7%	3%	1%	2%	35%
Expansion of Insured Mortgage Purchase program	76%	24%	1%	1%	-	-	59%
Rural support-Community Futures Network	75%	25%	2%	<1%	1%	1%	54%
Manitoba Gap Protection Plan [MGPP]	72%	28%	11%	8%	1%	1%	33%
RDA-Small Medium business support	68%	32%	3%	1%	2%	1%	33%
Regional Relief and recovery fund [RRRF]	63%	37%	4%	-	3%	1%	36%
Manitoba Protection Plan for Business	60%	40%	1%	<1%	<1%	<1%	32%

Government Business Support Plans – Awareness by Sector

Q3: Federal and provincial governments have announced multiple COVID-19 support plans for the businesses. Which of the following support plans are you aware of/applied to or received benefits for?

Base : Manitoba Chambers of Commerce & The Winnipeg Chamber of Commerce Members (n=344)

Relief funds	Consumer/ Retail/ Services	Restaurant/ Hospitality/ Tourism/ Recreation	Construction/ Manufacturing/ Agriculture/ Transportation	Professional Services/ Technology/ Communication s	Non-profit/ Associations / Arts and Culture	Education/ Healthcare/ Government/ Public Admin
Canada Emergency Wage Subsidy - 75% [CEWS]	100%	100%	94%	100%	97%	92%
Canada Emergency Commercial Rent Assistance [CECRA]	97%	94%	91%	96%	97%	92%
Reduced and Deferred - Income /Sales /Customs duty payments	94%	94%	91%	92%	88%	73%
Temporary Changes to the Canada Summer Jobs Program	94%	87%	70%	84%	98%	73%
Support for Indigenous businesses	94%	96%	85%	86%	95%	86%
Temporary Foreign Workers Program	94%	90%	91%	86%	93%	73%
10% Temporary Wage Subsidy for Employers	92%	94%	93%	95%	97%	81%
Canada Emergency Business Account [CEBA]	89%	98%	91%	95%	97%	86%
Summer Student Recovery Program	89%	88%	85%	95%	95%	70%
Food Supply and Agri Recovery Support Initiatives	89%	81%	89%	85%	85%	76%
Extended Workshare Program	85%	77%	85%	86%	80%	68%
Manitoba Gap Protection Plan [MGPP]	82%	62%	67%	73%	78%	70%
Expansion of Insured Mortgage Purchase program	82%	69%	74%	74%	81%	76%
RDA-Small Medium business support	71%	60%	67%	74%	75%	57%
Rural support-Community Futures Network	71%	77%	70%	81%	83%	62%
Business Credit Availability Program [BCAP]	68%	75%	80%	84%	78%	65%
Regional Relief and recovery fund [RRRF]	63%	63%	59%	68%	69%	46%

Government Business Support Plans – Applied by Sector

Q3: Federal and provincial governments have announced multiple COVID-19 support plans for the businesses. Which of the following support plans are you aware of/applied to or received benefits for?

Base : Manitoba Chambers of Commerce & The Winnipeg Chamber of Commerce Members (n=344)

Relief funds	Consumer/ Retail/ Services	Restaurant/ Hospitality/ Tourism/ Recreation	Construction/ Manufacturing/ Agriculture/ Transportation	Professional Services/ Technology/ Communications	Non-profit/ Associations/ Arts and Culture	Education/ Healthcare/ Government/ Public Admin
Canada Emergency Business Account (CEBA)	40%	62%	37%	32%	39%	32%
Canada Emergency Wage Subsidy - 75% (CEWS)	29%	54%	39%	41%	47%	27%
Manitoba Gap Protection Plan (MGPP)	22%	12%	4%	7%	7%	14%
10% Temporary Wage Subsidy for Employers	20%	40%	33%	44%	39%	30%
Reduced and Deferred - Income /Sales /Customs duty payments	18%	21%	20%	27%	7%	11%
Canada Emergency Commercial Rent Assistance (CECRA)	12%	17%	2%	5%	3%	5%
Temporary Changes to the Canada Summer Jobs Program	8%	17%	7%	3%	32%	14%
Summer Student Recovery Program	8%	8%	20%	4%	8%	5%
Business Credit Availability Program (BCAP)	6%	13%	7%	11%	-	5%
Regional Relief and recovery fund (RRRF)	6%	4%	4%	5%	-	3%
RDA-Small Medium business support	3%	6%	2%	5%	2%	-
Extended Workshare Program	2%	4%	9%	1%	-	-
Rural support-Community Futures Network	2%	10%	-	1%	2%	-
Manitoba Protection Plan for Business	2%	-	-	3%	-	-
Expansion of Insured Mortgage Purchase program	-	4%	2%	1%	-	-
Support for Indigenous businesses	-	2%	-	-	-	-
Food Supply and Agri Recovery Support Initiatives	-	2%	2%	-	-	-

AWARENESS – Government Individual Support Plans

Q2: Federal and provincial governments have announced multiple COVID-19 support plans for the businesses. Which of the following support plans are you aware of/applied to or received benefits for?

Base : Manitoba Chambers of Commerce & The Winnipeg Chamber of Commerce Members (n=344)

Relief funds	Total Aware	Total Unaware	Total Applied	Applied			Not Applicable
				Received	Not received	Denied	
Extra time to file Income Tax Returns	98%	2%	-	-	-	-	32%
Unemployment Insurance	96%	4%	5%	3%	1%		60%
Canada Emergency Response Benefit	94%	6%	22%	20%	1%	1%	40%
Increasing Child Tax Benefit	94%	6%	16%	15%	1%		60%
Canada Emergency Student Benefit	94%	6%	1%	1%			74%
Moratorium - Canada Student & apprenticeship Loans Repayment	93%	7%	1%	1%	0%		78%
Mortgage Support	89%	11%	8%	8%	0%		51%
GST & HST Payment Enhancement	76%	24%	9%	8%	1%		37%



Return to Work – Changes in Operations

Changes in operations – by region

Q8: what changes from how you operated before the covid-19 pandemic have you implemented or likely to implement?

Base : Manitoba Chambers of Commerce & The Winnipeg Chamber of Commerce Members (n=344)



These changes are being implemented by businesses facing reduced operations. 23% of the businesses with unchanged/improved state of operations have not implemented any changes, vs. 2% of businesses with at least a 70% decline in operations.

- 36% of the business with reduced operations are looking to diversify vs only 15% of businesses with no change/ increased operations
- 45% of businesses with 70% decline in operations have reduced their workforce, vs. 10% of business with no change/ increased operations

■ Winnipeg
■ Rest of MB

Changes in operations – by industry size

Q8: What changes from how you operated before the covid-19 pandemic have you implemented or likely to implement?

Base : Manitoba Chambers of Commerce & The Winnipeg Chamber of Commerce Members (n=344)

Size of Industry	Changes in operations
<p>Medium-Large (over 50 Employees)</p>	<ul style="list-style-type: none"> • Workforce reorganization, including more working from home (74%) • Technology upgrades (44%) • Expand online sales and other low contact customer interactions (42%) • A reduced workforce (36%) • Diversification to new offering/business (34%)
<p>Small – Medium (11-50 Employees)</p>	<ul style="list-style-type: none"> • Workforce reorganization, including more working from home (49%) • A reduced workforce (42%) • Technology upgrades (33%) • Expand online sales and other low contact customer interactions (32%) • Diversification to new offering/business (31%)
<p>Small (1-10 Employees)</p>	<ul style="list-style-type: none"> • Expand online sales and other low contact customer interactions (31%) • Technology upgrades (28%) • Diversification to new offering/business (26%) • Workforce reorganization, including more working from home (26%) • A reduced workforce (25%)

Changes in operations – by industry type

Q8: what changes from how you operated before the covid-19 pandemic have you implemented or likely to implement?

Base : Manitoba Chambers of Commerce & The Winnipeg Chamber of Commerce Members (n=344)

Changes in operation	Consumer/ Retail/ Services	Restaurant/ Hospitality/ Tourism/ Recreation	Construction/ Manufacturing/ Agriculture/ Transportation	Professional Services/ Technology/ Communications	Non-profit/ Associations/ Arts and Culture	Education/ Healthcare/ Government/ Public Admin
Expand online sales and other low contact customer interactions	45%	31%	31%	30%	27%	30%
A reduced workforce	38%	48%	22%	23%	29%	30%
Diversification to new offering/ business	26%	38%	22%	23%	39%	27%
Re-evaluate inventory management	25%	21%	19%	3%	7%	8%
Technology upgrades	25%	21%	31%	42%	31%	46%
Look at changing business's supply chain	15%	8%	22%	4%	7%	-
Look at collaborating with other business/ partnerships	14%	19%	19%	23%	24%	16%
Workforce reorganization, including more working from home	12%	17%	39%	62%	58%	46%
Work-around for travel restrictions	6%	27%	35%	16%	8%	19%
Workforce skill upgrades	5%	10%	17%	18%	17%	16%
Introduced new health and safety measures (including PPE, social distancing, etc.)	2%	4%		1%	5%	8%
No major changes required	18%	8%	17%	5%	10%	14%

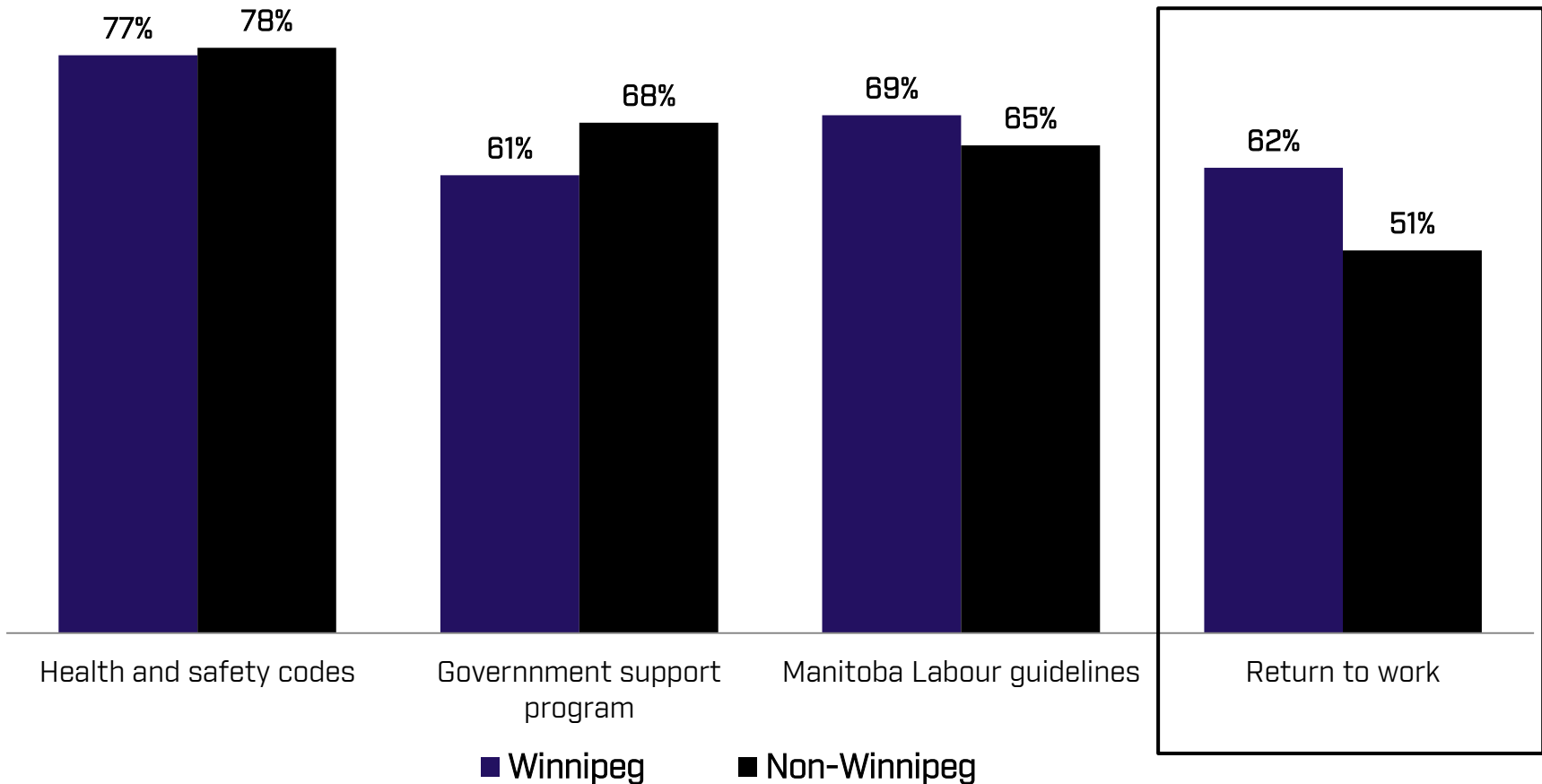


Return to Work – Assistance Areas

Important information needs (rated 8, 9, 10 out of 10) – by Region

Q4: Please rate the information in terms of its importance to re-starting/opening the business.

Base : Manitoba Chambers of Commerce & The Winnipeg Chamber of Commerce Members (n=344)



Health and safety codes: Information on health and safety codes for employees and the public (overall: 77%)

Government support program: Information on government covid-19 support programs and how they change in the transition to a return to work (overall: 64%)

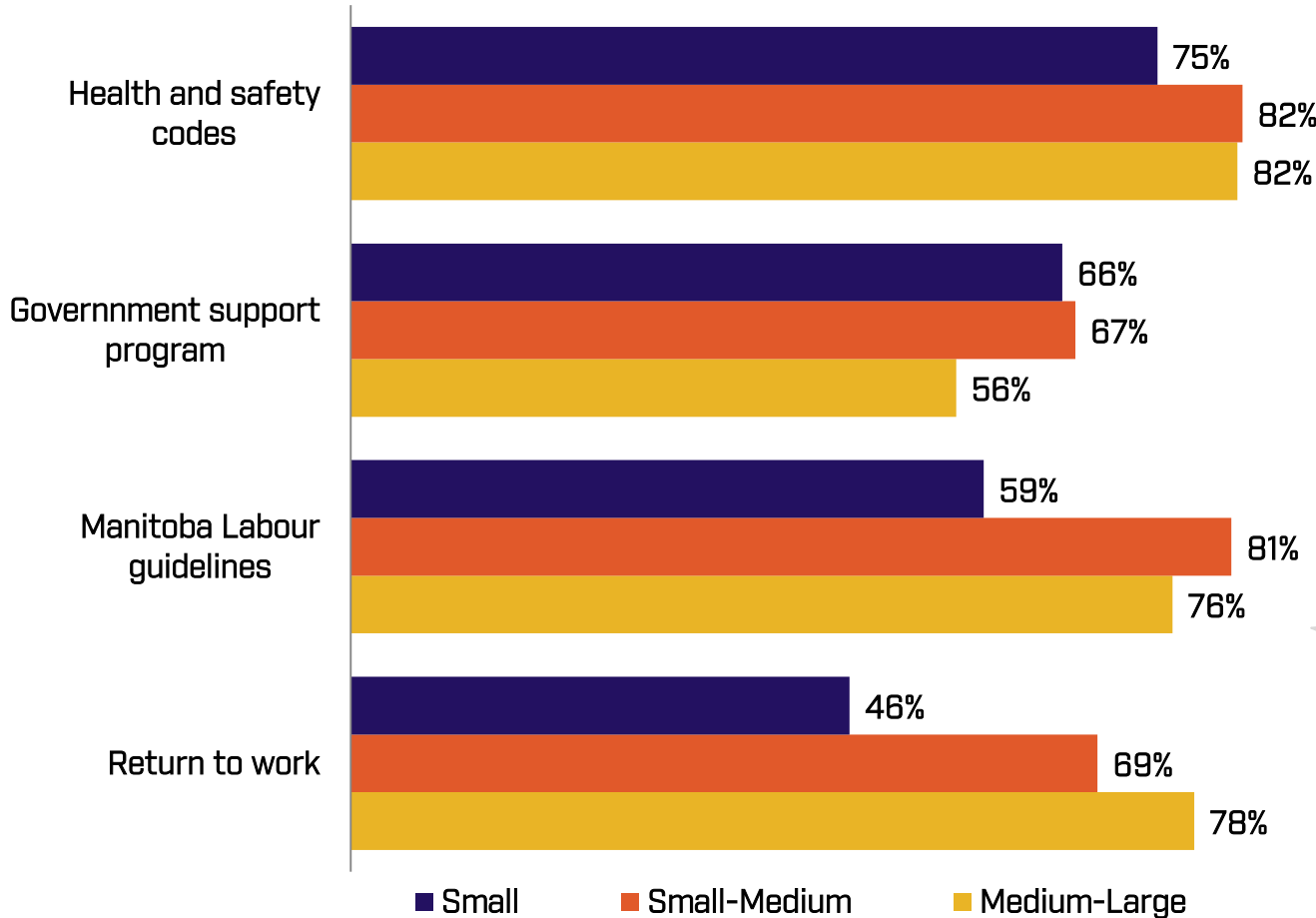
Manitoba Labour guidelines: Information on Manitoba Labour guidelines as they pertain to employee wellness (overall: 67%)

Return to work: Advice on HR/employee-related concerns about returning to work (overall: 57%)

Important information (rated 8, 9, 10 out of 10) – by Industry Size

Q4: Please rate the information in terms of its importance to re-starting/opening the business.

Base : Manitoba Chambers of Commerce & The Winnipeg Chamber of Commerce Members (n=344)



- Businesses shut down or having lower than 50% operations have more interest in Gov support program (70% vs 57%).
- Businesses that faced only up to 30% decline in operations are more interested in understanding Manitoba labour guidelines than businesses experiencing more than 70% loss in operations. (76% vs 59%)

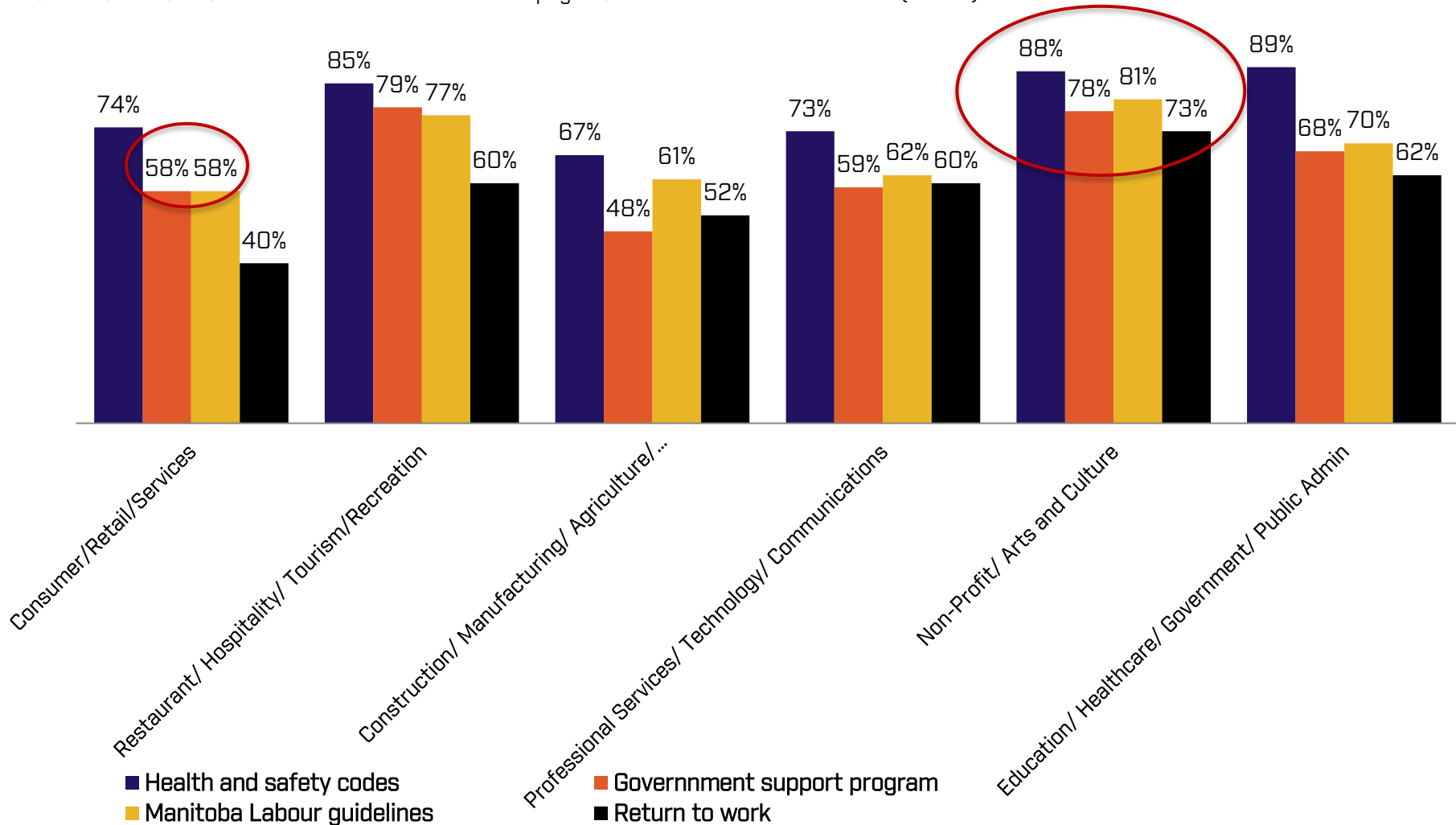
Importance of Manitoba labour guidelines has increased since March. Only 12% showed interest in Manitoba Labour guidelines information in last wave.

Health and safety codes: Information on health and safety codes for employees and the public (overall: 77%)
Government support program: Information on government covid-19 support programs and how they change in the transition to a return to work (overall: 64%)
Manitoba Labour guidelines: Information on Manitoba Labour guidelines as they pertain to employee wellness (overall: 67%)
Return to work: Advice on HR/employee related concerns about returning to work (overall: 57%)

Important information (rated 8, 9, 10 out of 10) – by Industry Type

Q4: Please rate the information in terms of its importance to re-starting/opening the business.

Base : Manitoba Chambers of Commerce & The Winnipeg Chamber of Commerce Members (n=344)



■ Health and safety codes

■ Manitoba Labour guidelines

■ Government support program

■ Return to work

Health and safety codes: Information on health and safety codes for employees and the public (overall: 77%)

Government support program: Information on government covid-19 support programs and how they change in the transition to a return to work (overall: 64%)

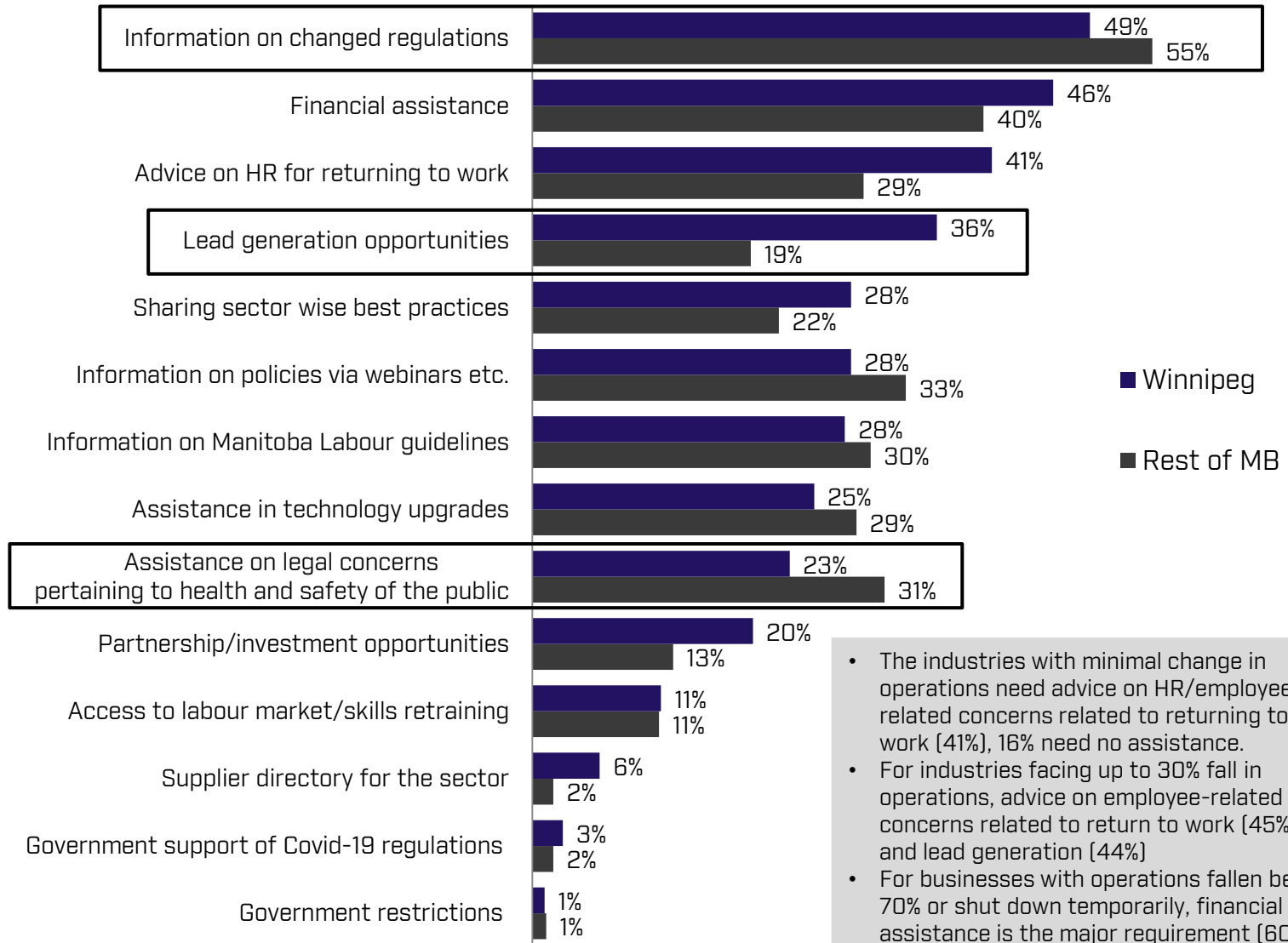
Manitoba Labour guidelines: Information on Manitoba Labour guidelines as they pertain to employee wellness (overall: 67%)

Return to work: Advice on HR/employee-related concerns about returning to work (overall: 57%)

Return to Work Assistance – by Region

Q9: Please select the items that will be most important assistance for your business to successfully return to work?

Base : Manitoba Chambers of Commerce & The Winnipeg Chamber of Commerce Members (n=344)



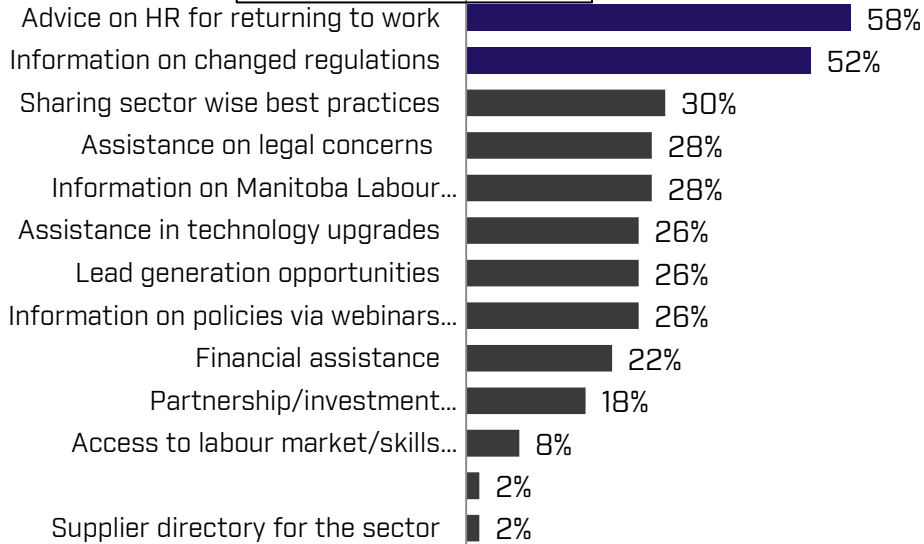
- The industries with minimal change in operations need advice on HR/employee-related concerns related to returning to work (41%), 16% need no assistance.
- For industries facing up to 30% fall in operations, advice on employee-related concerns related to return to work (45%) and lead generation (44%)
- For businesses with operations fallen below 70% or shut down temporarily, financial assistance is the major requirement (60%)

Assistance – by Industry Size

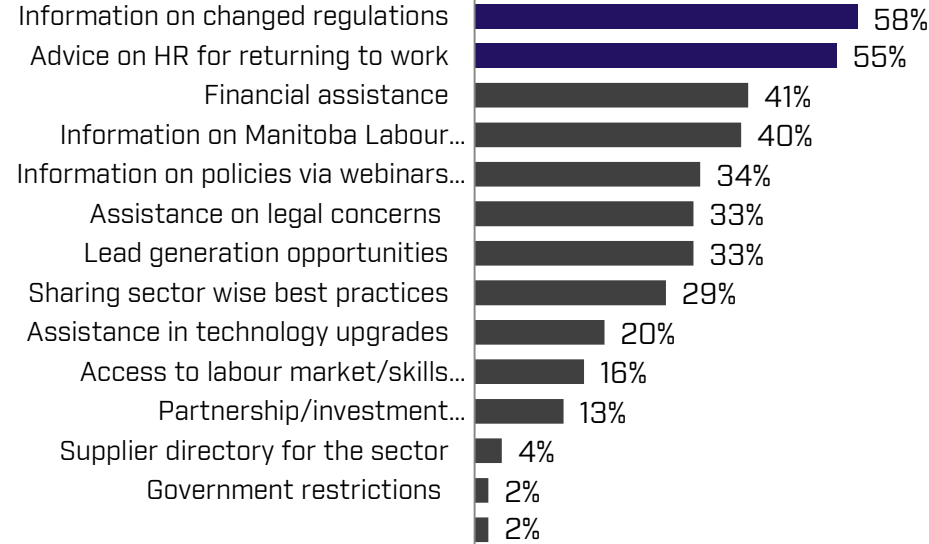
Q9: Please select the items that will be most important assistance for your business to successfully return to work?

Base : Manitoba Chambers of Commerce & The Winnipeg Chamber of Commerce Members (n=344)

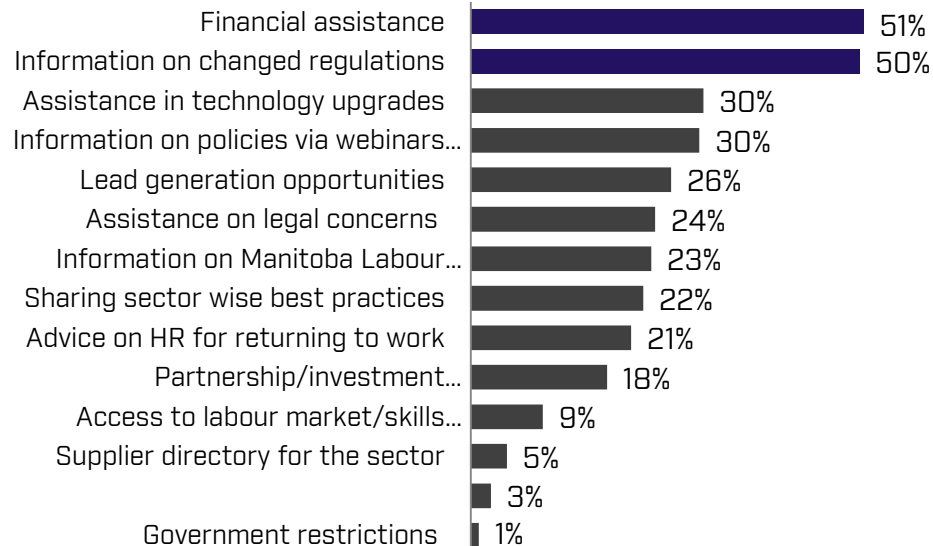
Medium-Large



Small-Medium



Small



Assistance – by Industry Type

Q9: Please select the items that will be most important assistance for your business to successfully return to work?

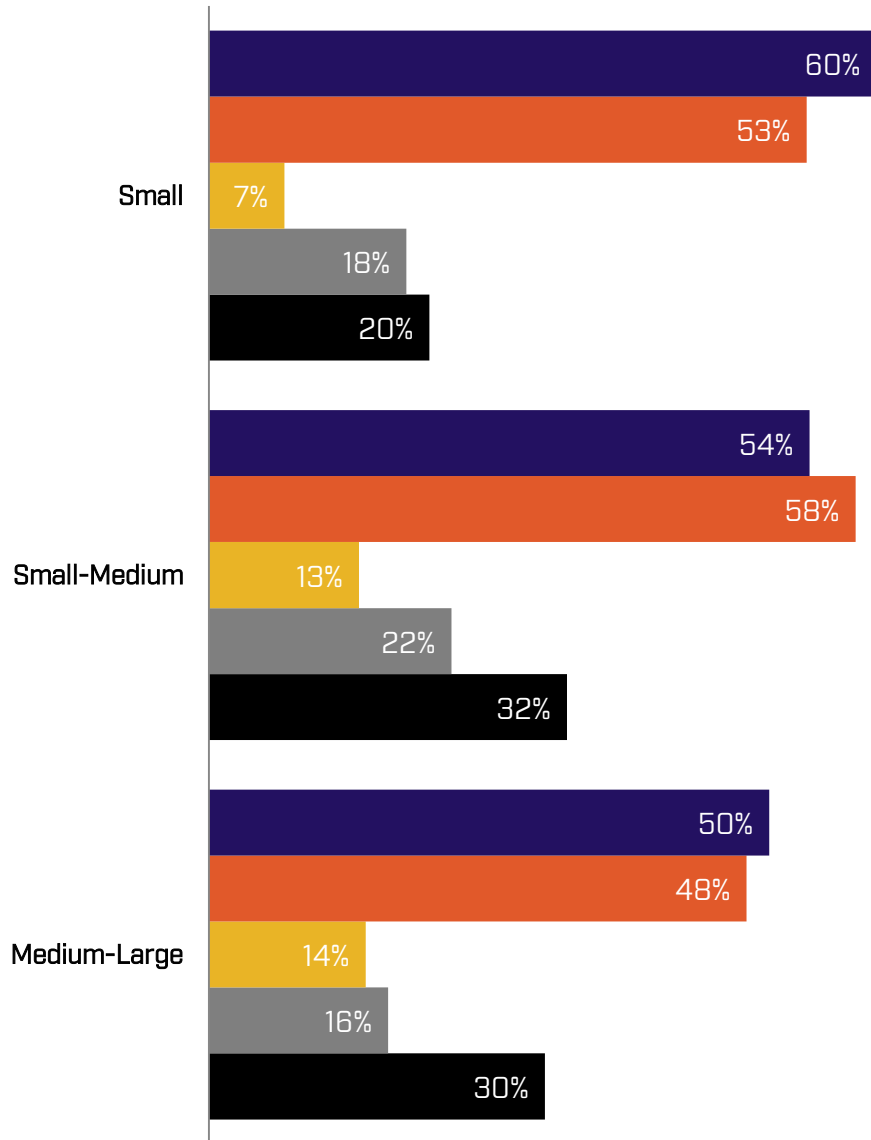
Base : Manitoba Chambers of Commerce & The Winnipeg Chamber of Commerce Members (n=344)

Assistance	Consumer/ Retail/ Services	Restaurant/ Hospitality/ Tourism/ Recreation	Construction/ Manufacturing/ Agriculture/ Transportation	Professional Services/ Technology/ Communications	Non-profit/ Associations/ Arts and Culture	Education/ Healthcare/ Government/ Public Admin
Information on changed regulations	48%	69%	41%	48%	59%	54%
Financial assistance/loan opportunities/ fund raising opportunities	43%	58%	31%	34%	63%	32%
Provision of information on government policies or assistance via webinars etc.	34%	38%	19%	29%	32%	35%
Information on Manitoba Labour guidelines	31%	33%	22%	25%	31%	38%
Assistance in technology upgrades	29%	15%	26%	33%	32%	22%
Lead generation opportunities/ networking/ trade shows	26%	27%	35%	38%	22%	14%
Advice on HR/employee related concerns related to returning to work	23%	29%	35%	44%	36%	54%
Sharing sector wise best practices	22%	23%	17%	25%	31%	43%
Assistance on legal concerns pertaining to health and safety of the public	14%	31%	19%	23%	32%	57%
Partnership/investment opportunities	14%	15%	26%	14%	17%	14%
Access to labour market/skills retraining	11%	15%	17%	5%	8%	16%
Supplier directory for the sector	6%	2%	4%	5%	3%	3%
Government support of Covid-19 regulations (including CECRA, PPE etc.)	2%	4%	-	-	5%	5%
Government restrictions (including travel bans, business restrictions, etc.)	-	4%	2%	1%	-	-

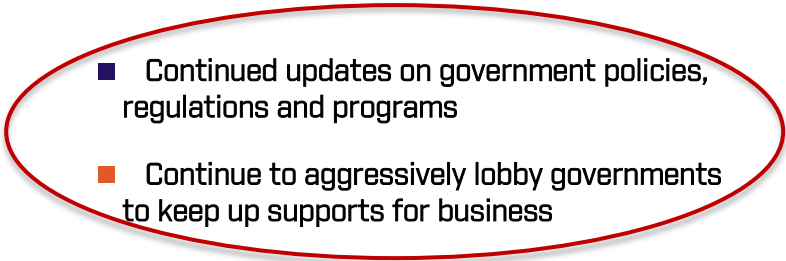
Expectations from the Chambers

Q10: What can organizations like the Manitoba or Winnipeg Chambers of Commerce do to help you successfully transition from the current situation to returning to work scenario?

Base : Manitoba Chambers of Commerce & The Winnipeg Chamber of Commerce Members (n=344)



- Businesses in Winnipeg are more interested in networking opportunities than those in rest of MB [25% vs. 12%]
- Lobbying for support is the widely expected by business facing slow down/shut-down [60% vs. 35% by businesses that had minimal change/improved operations]

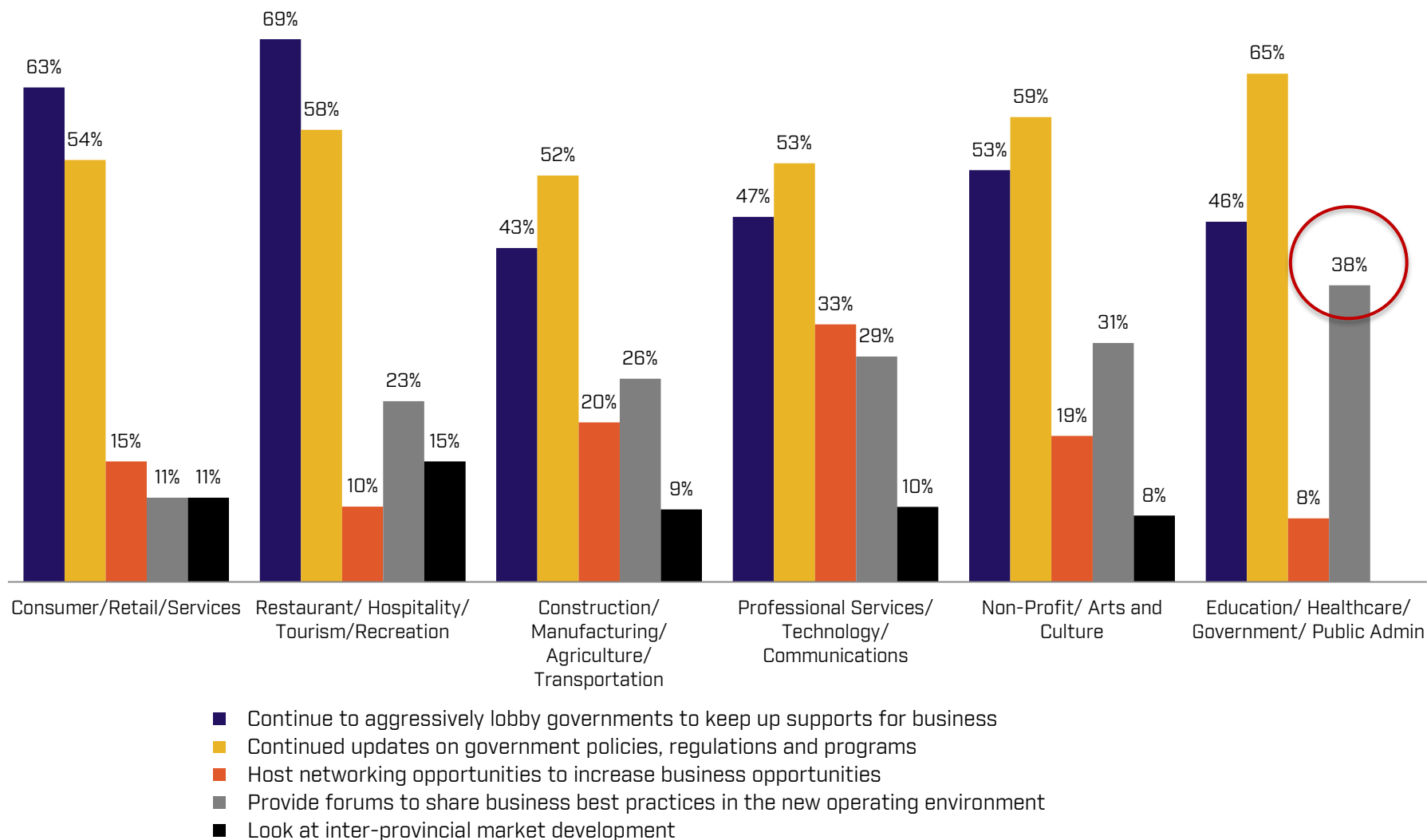


- Continued updates on government policies, regulations and programs
- Continue to aggressively lobby governments to keep up supports for business
- Look at inter-provincial market development
- Host networking opportunities to increase business opportunities
- Provide forums to share business best practices in the new operating environment

Expectations from Organizations – by Industry type

Q10: What can organizations like the Manitoba or Winnipeg Chambers of Commerce do to help you successfully transition from the current situation to returning to work scenario?

Base : Manitoba Chambers of Commerce & The Winnipeg Chamber of Commerce Members (n=344)



Recommendations for Economic Recovery

Q11: As a business person, what actions do you recommend the provincial government take to get Manitoba's economy back on track and growing again?

Base : Manitoba Chambers of Commerce & The Winnipeg Chamber of Commerce Members (n=344)

Recommendations – Economic recovery	Total	Winnipeg	Rest of MB	Medium-Large	Small-Medium	Small
Invest in healthcare infrastructure to help prepare the system for a possible second surge of covid-19	40%	42%	39%	40%	38%	48%
Support local tourism with increased marketing across Canada	33%	29%	38%	36%	34%	22%
Reduce regulations	31%	25%	38%	34%	30%	20%
Fast track investment in capital infrastructure even if it means increasing the deficit	28%	36%	19%	20%	34%	52%
Work with other provincial governments to lower inter-provincial trade barriers	25%	23%	28%	27%	24%	20%
Increase highway and other road related infrastructure	22%	20%	24%	17%	24%	40%
Reduce government spending	21%	18%	23%	21%	15%	24%
Invest in green technology and alternative energy	19%	22%	16%	19%	23%	12%
Raise personal taxes like the PST and income taxes to fund core services and allow stimulus spending	13%	15%	10%	10%	16%	12%
Financial support (including small businesses, local organizations, etc.)	4%	6%	2%	4%	5%	2%
Invest in education (including schools, training centres, child care centres, etc.)	3%	3%	2%	2%	2%	8%
Reduce taxes (including personal, business, PST, GST, etc.)	1%	3%	-	-	4%	2%

Recommendations for Economic Recovery – Industry type

Q11: As a business person, what actions do you recommend the provincial government take to get Manitoba's economy back on track and growing again? Base : Manitoba Chambers of Commerce & The Winnipeg Chamber of Commerce Members (n=344)

Industry Type	Recommendations – Economic recovery
Consumer/ Retail/ Services	<ul style="list-style-type: none"> • Reduce regulations [42%] • Invest in healthcare infrastructure to help prepare the system for a possible second surge of covid-19 [40%] • Reduce government spending [28%] • Work with other provincial governments to lower inter-provincial trade barriers [25%] • Support local tourism with increased marketing across Canada [23%]
Restaurant/ Hospitality/ Tourism/ Recreation	<ul style="list-style-type: none"> • Support local tourism with increased marketing across Canada [52%] • Invest in healthcare infrastructure to help prepare the system for a possible second surge of covid-19 [33%] • Reduce regulations [29%] • Fast track investment in capital infrastructure even if it means increasing the deficit [27%] • Increase highway and other road related infrastructure [25%]
Construction/ Manufacturing/ Agriculture/ Transportation	<ul style="list-style-type: none"> • Work with other provincial governments to lower inter-provincial trade barriers [37%] • Invest in healthcare infrastructure to help prepare the system for a possible second surge of covid-19 [33%] • Reduce regulations [33%] • Fast track investment in capital infrastructure even if it means increasing the deficit [31%] • Increase highway and other road related infrastructure [28%]
Professional Services/ Technology/ Communications	<ul style="list-style-type: none"> • Fast track investment in capital infrastructure even if it means increasing the deficit [48%] • Invest in healthcare infrastructure to help prepare the system for a possible second surge of covid-19 [42%] • Reduce regulations [30%] • Invest in green technology and alternative energy [29%] • Support local tourism with increased marketing across Canada [27%]
Non-profit/ Associations/ Arts and Culture	<ul style="list-style-type: none"> • Support local tourism with increased marketing across Canada [51%] • Invest in healthcare infrastructure to help prepare the system for a possible second surge of covid-19 [41%] • Work with other provincial governments to lower inter-provincial trade barriers [29%] • Invest in green technology and alternative energy [25%] • Reduce regulations [22%]
Education/ Healthcare/ Government/ Public Admin	<ul style="list-style-type: none"> • Invest in healthcare infrastructure to help prepare the system for a possible second surge of covid-19 [59%] • Support local tourism with increased marketing across Canada [27%] • Reduce regulations [27%] • Fast track investment in capital infrastructure even if it means increasing the deficit [27%] • Work with other provincial governments to lower inter-provincial trade barriers [24%]



DETAILED RESULTS – Respondent Profile

RESPONDENT PROFILE

	Unweighted		Unweighted
n=	344		n= 344
Role	[%]		Type of Industry
Owner, Partner, CEO, President	68		Consumer/ Retail/Services
Senior Management	15		Restaurant/ Hospitality/Tourism/Recreation
Management	8		Construction/ Trades/Repair
Administration/ Employee	6		Manufacturing/ Distribution/Agriculture/Transportation
Other	2		Professional Services/Technology/ Communication
Size			Non-profit/Arts and culture
Small (1-10 Employee)	56		Education/ Healthcare/ Government/ Public Admin
Small-Medium (11-50 Employees)	28		
Medium-Large (over 50 Employees)	15		
Region			
Winnipeg	53		
North	12		
Eastman	9		
Westman	16		
Southman	10		