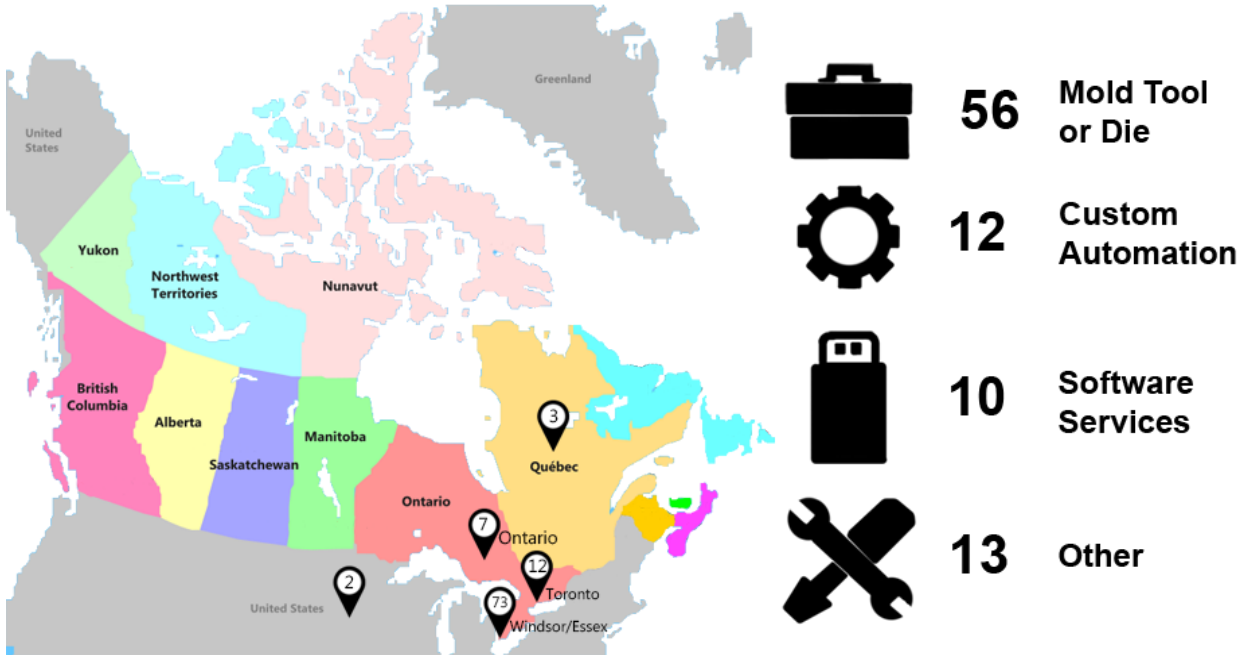


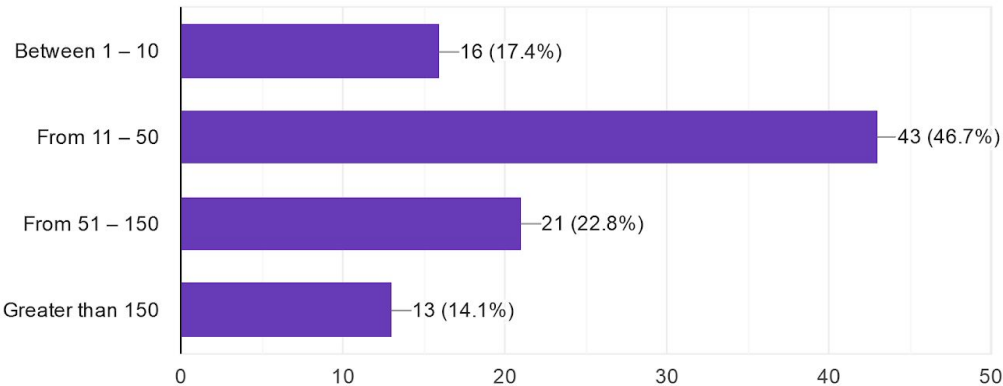
Survey conducted by CAMM and Automate Canada with a total of 93 responses.

Where respondents are and what is their primary business activity



Company Size (# of employees on 01/31/2020)

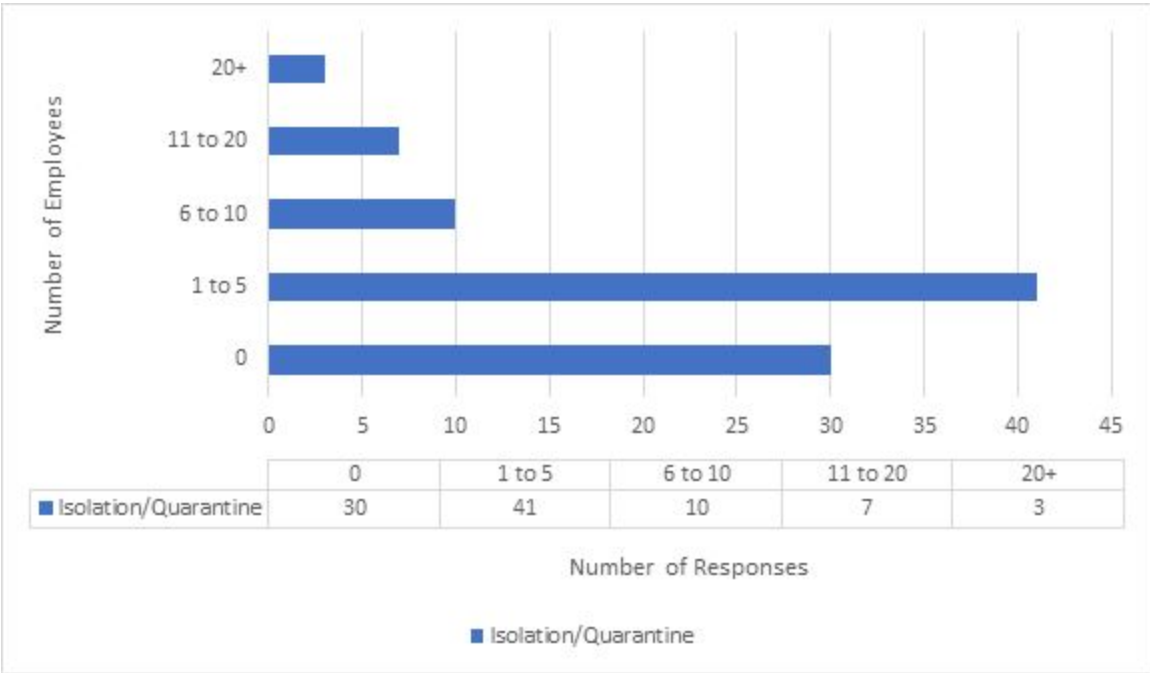
Almost 65% of our respondents are small companies, with between 1 - 50 employees.



Direct impact reported on the workforce:

Most workplaces still have no measures in place. Self isolation/quarantine are the most frequent actions right now. Workplaces do have some layoffs that have started and some have actually hired a couple of employees.

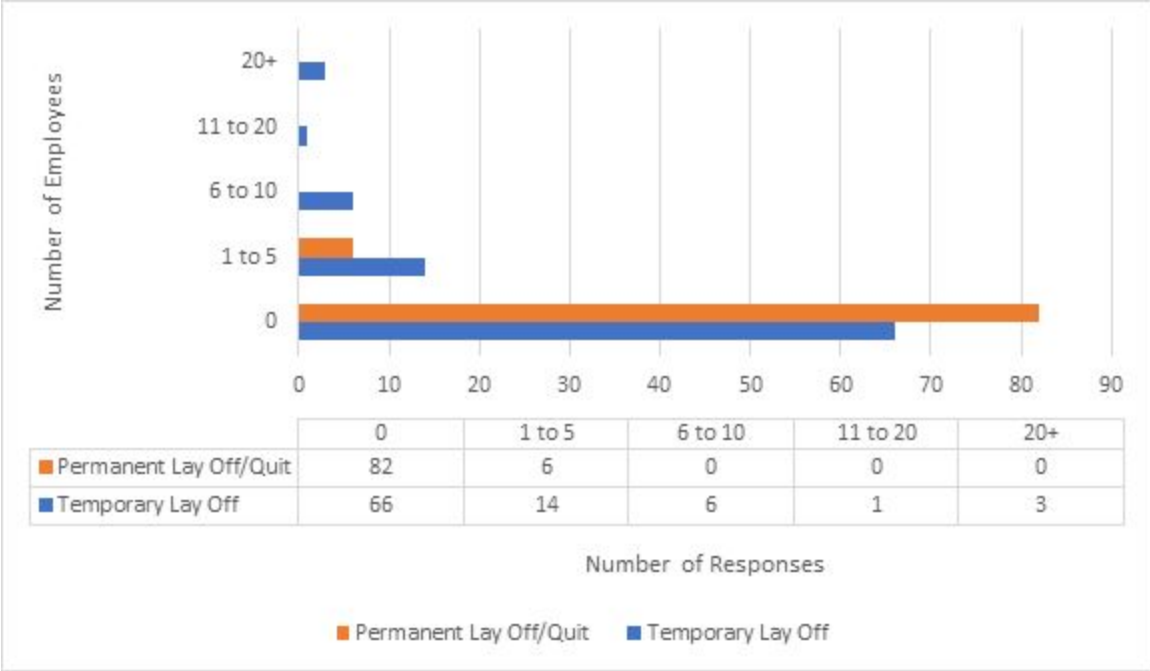
30 manufacturing workplaces reported having no employees on quarantine, which means over 2/3rds are affected by isolation/quarantine. In total 410 employees are currently in isolation/quarantine, in relatively small numbers at each workplace.



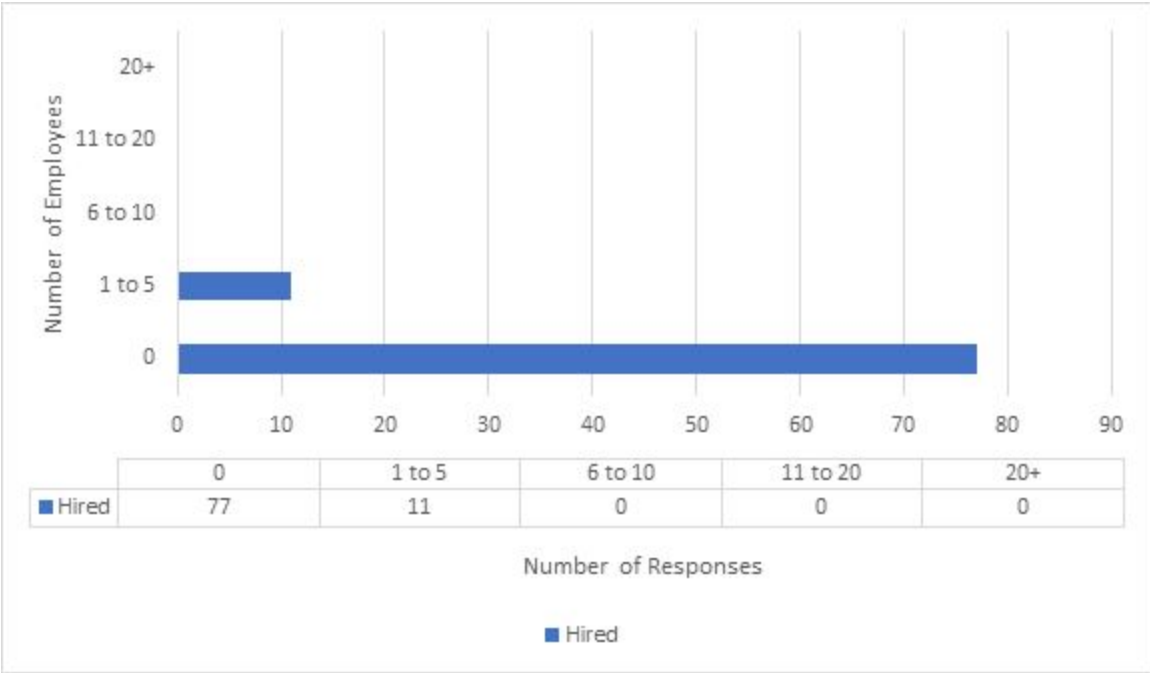
The majority of manufacturers reported no layoffs - neither temporary nor permanent.

Of our respondents, 71% have no employees on temporary layoff. Only 22% have let someone go permanently.

A total of 711 employees were placed onto temporary layoffs and 8 employees were let go permanently.



And yes, some manufacturers are hiring! 16 employees were hired in the past 7 days by 12% of our respondents.



Government Programs Currently Being Accessed (with # of times mentioned):

The Work Share program and accessing EI for laid off workers were the most frequently mentioned programs.

Workshare	5	SWODF	2
EI	4	EDC/BDC	1
O-AMP	4	OCE	1
IRAP	3	COJG	1
SR&ED	3	Mitacs	1
FEDEV	2	NGEN	1

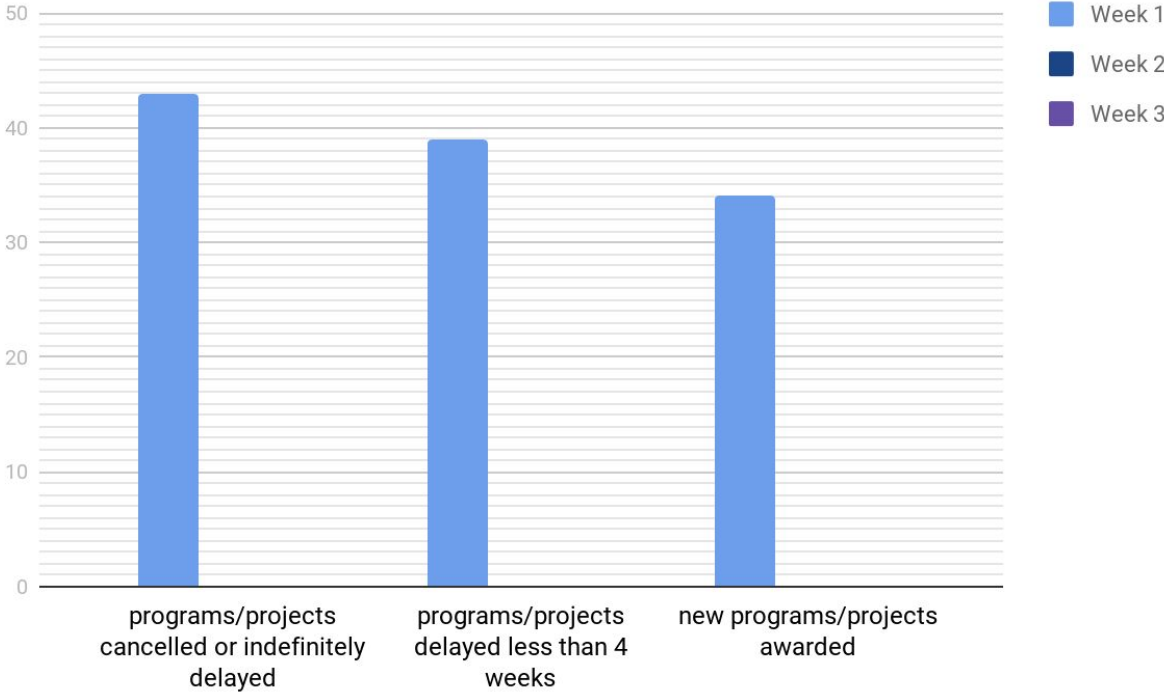
Biggest Impact on Canadian Business to Date (# of times Mentioned):

The general anxiety of the workforce (and its impact on productivity, we assume), project cancellations, inability to safely travel & challenges of working from home were the most mentioned impacts. The potential to lose employees, projects and sales are also big stress points.

Employee Anxiety	16	Supply Chain Delays	3
Project Cancellation or Delay	16	End of Face-Face Meetings	3
Employee Protection	17	Extra Costs	2
Declining Sales	15	US Exchange rate (declining Canadian dollar)	2
Travel	6	Completing Current Projects	2
Disruption	6	Media	1
Uncertainty of Plant Closure	5	Efficient Collaboration With at Home Workers	1
OEM Shutdowns	4	Massive Market Decline	1
Cash Flow	3	Lack of Government Direction	1
Supply Chain Delays	3	Border Backups	1
End of Face-Face Meetings	3	Cancellation of Classes & a Hold on Succession	1

Level of interruption/disruption to the sales pipeline

It's heartening to see that our members are reporting the award of new programs. Program delays & cancellations are inevitable; we are expecting this question to give us a trend to watch closely in the weeks to come.



Top Challenges in the coming month (# of times mentioned):

What is manufacturing worried about for the future? Cash flow is king, followed by employee retention, health & safety & supply chain sustainability

Cash Flow	52	Completion of Current Work	11
Employee Retention	27	Economy	8
Health and Safety	21	Off Site Employees	8
Supply Chain	18	Finding Employees	8
Employee Morale	17	Border Crossing/Travel restrictions	6
Cancellation of Future Work	17	Managing Change	8
Shutdown Effects	15	Transportation of Goods	5
Reduced Demand	11	Cybersecurity	1

Is the company willing and able to supply medical devices or other medical equipment or to supply molds/automation/services/other needed goods or services for medical devices/pharmaceutical manufacturing?

An overwhelming proportion (75%) said yes.

