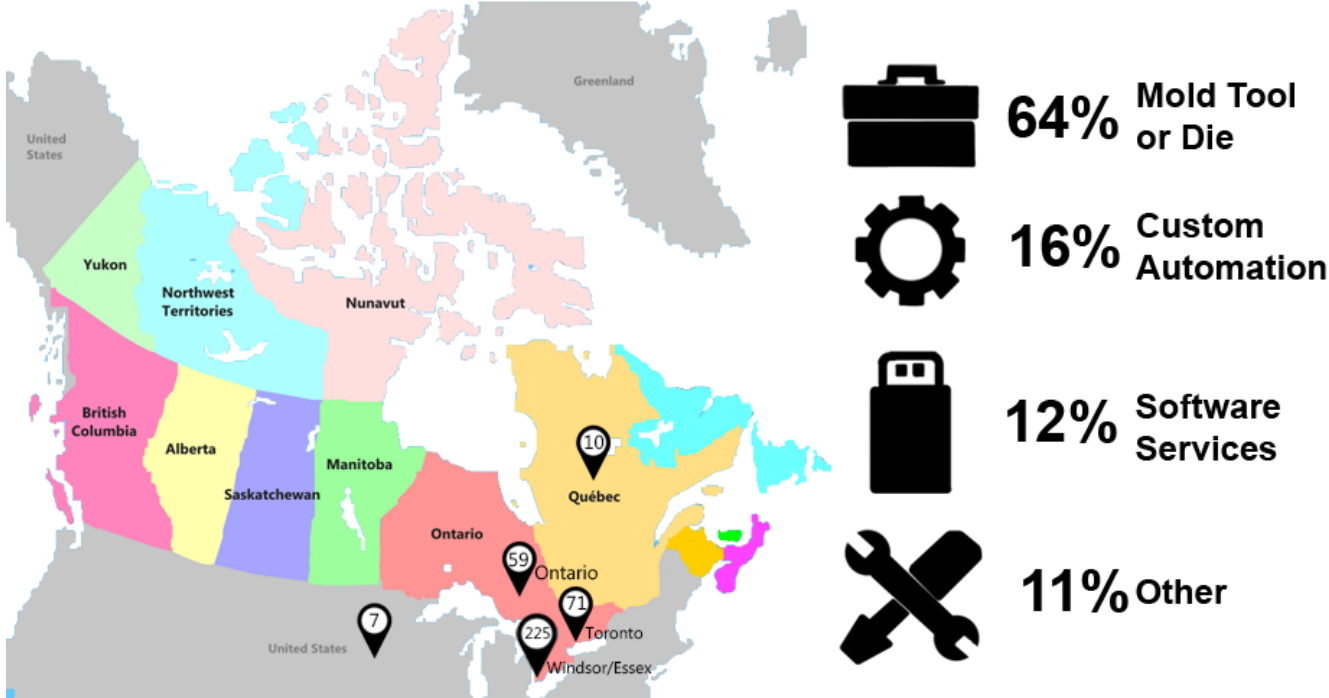


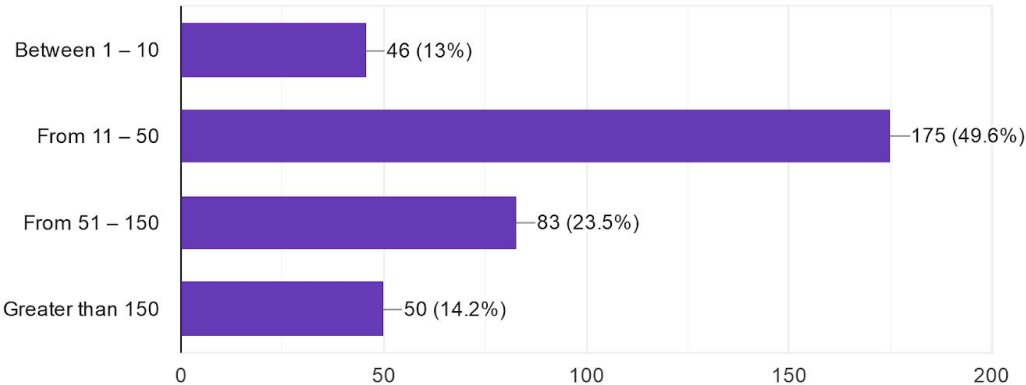
Survey conducted by CAMM and Automate Canada with a total of 72 responses for the Week Four survey (355 responses in total to date). This is approximately 25% less than the three prior weeks, so some results and graphs must be considered in light of that.

Location and primary business activity of our respondents to date



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

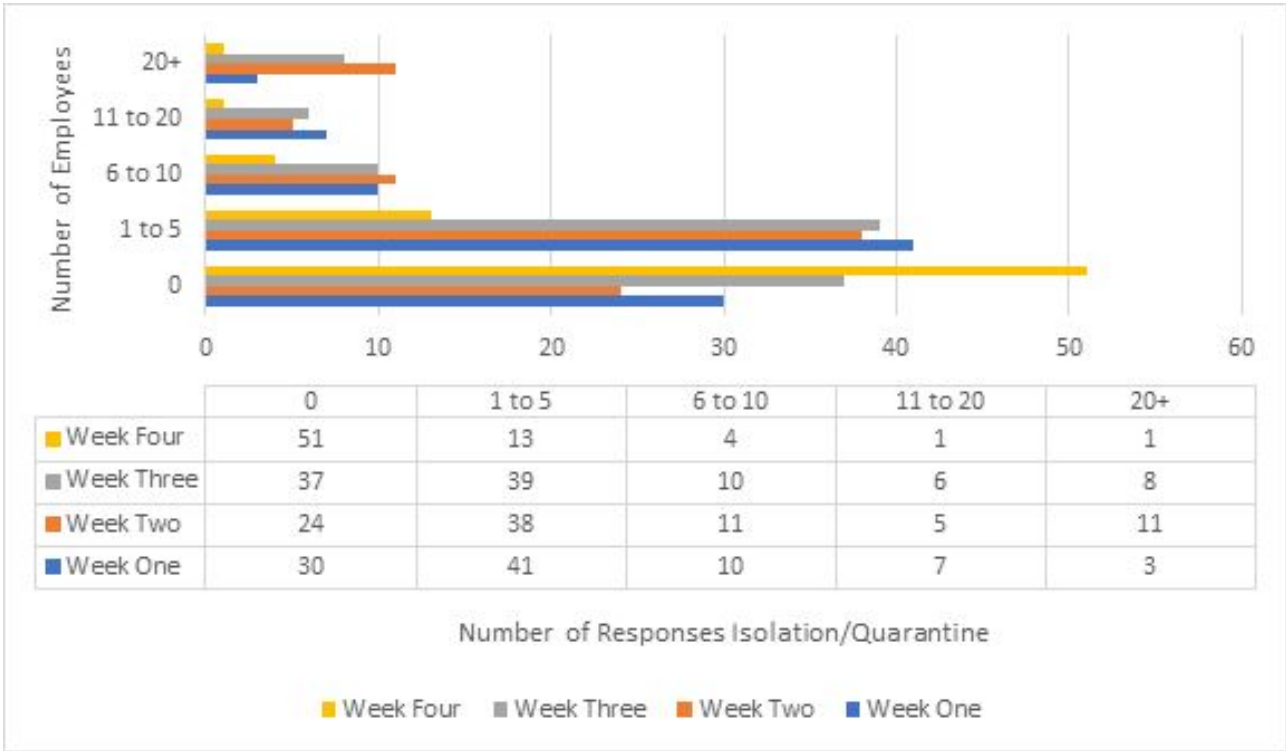
60% of our respondents are small companies, with between 1 - 50 employees.



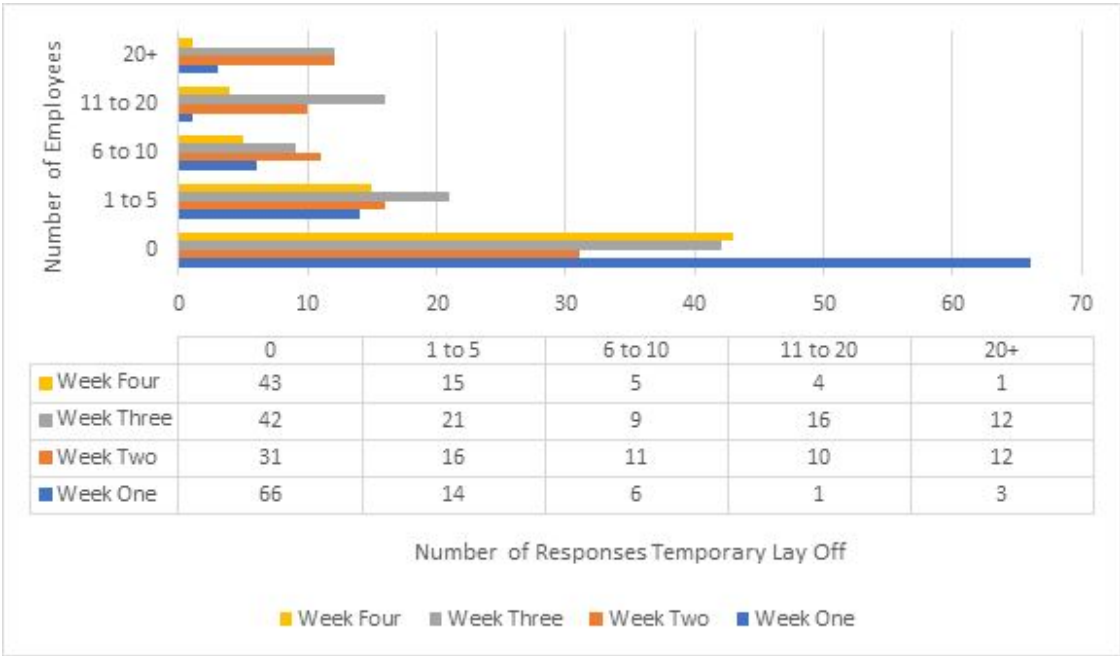
Direct impact reported on the workforce:

Mandatory Isolation or Quarantine: The number of employees out of the workplace due to isolation or quarantine dropped dramatically this week - down to 97 in total (compared to 544 last week).

51 manufacturing workplaces reported having no employees on quarantine, also up from 32 in week 3. Again, good news as this represents two thirds of our respondents with no employees off on quarantine or isolation.



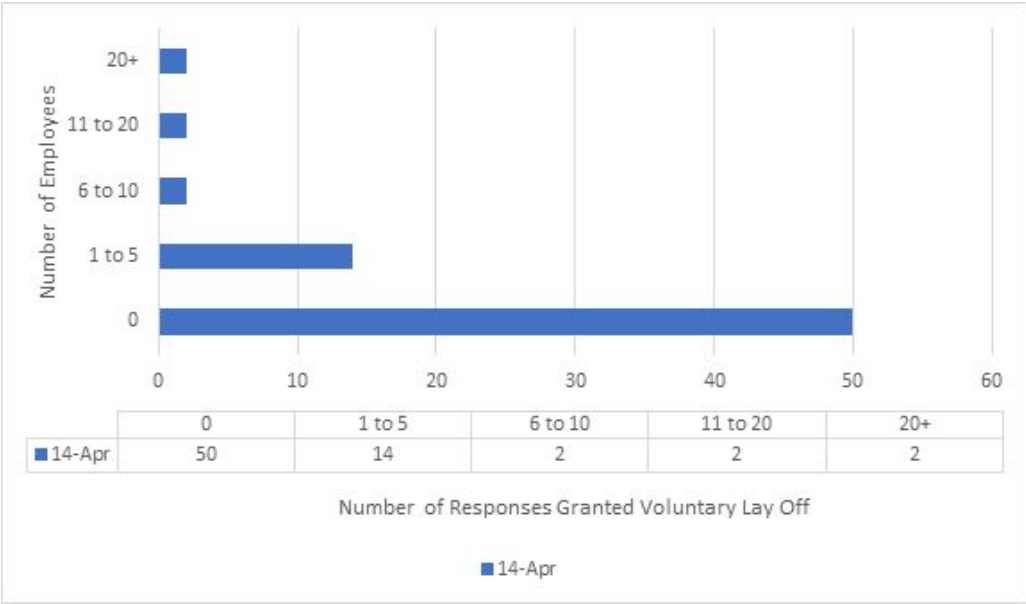
Temporary Layoffs: 43 workplaces, or 46% of our respondents, laid off no workers this week. In another positive trend, this increased from last week, where 33% of our respondents had not laid anyone off. The number of employees laid off also decreased dramatically, to a total of 197 employees laid off temporarily, compared to 2,661 in week 3. This is very positive news and a sign that workplace reductions or “right sizing” has likely moderated in response to decline in projects.



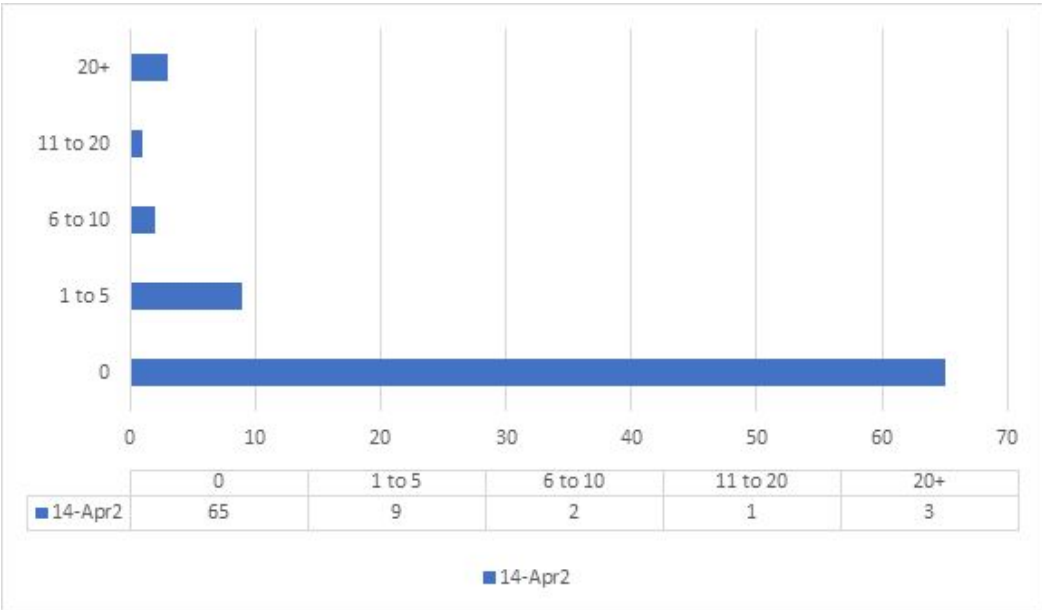
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We added two new questions this week

How many employees were granted voluntary layoffs: In total, 135 employees were reported as off on layoff at their request.

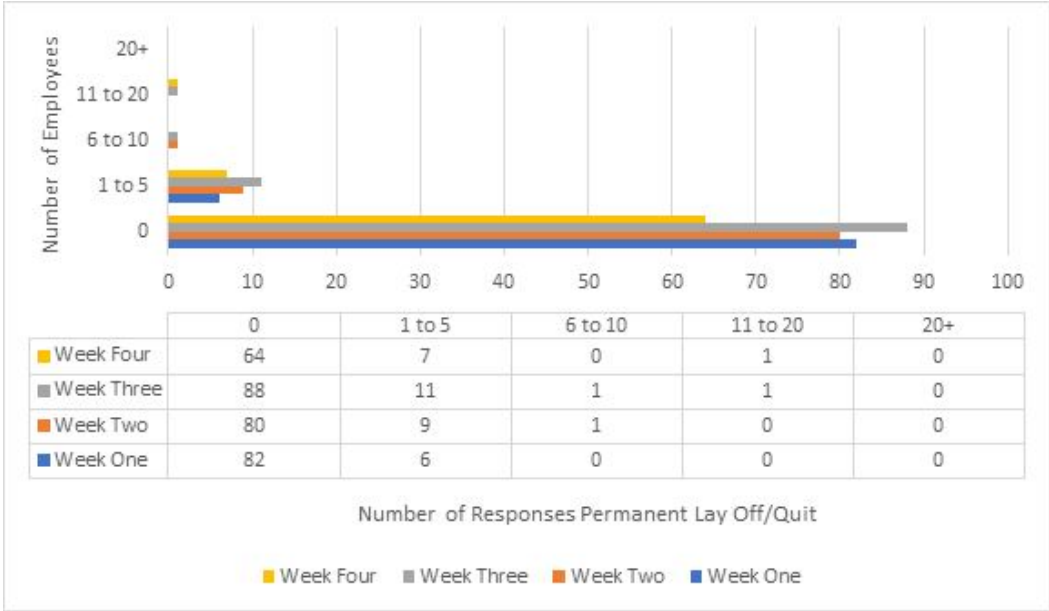


What about employees who have received full or partial wages, but are not actively working? In the past 7 days, there were a total of 475 “furloughed” employees. We’ll continue tracking these two categories going forward.

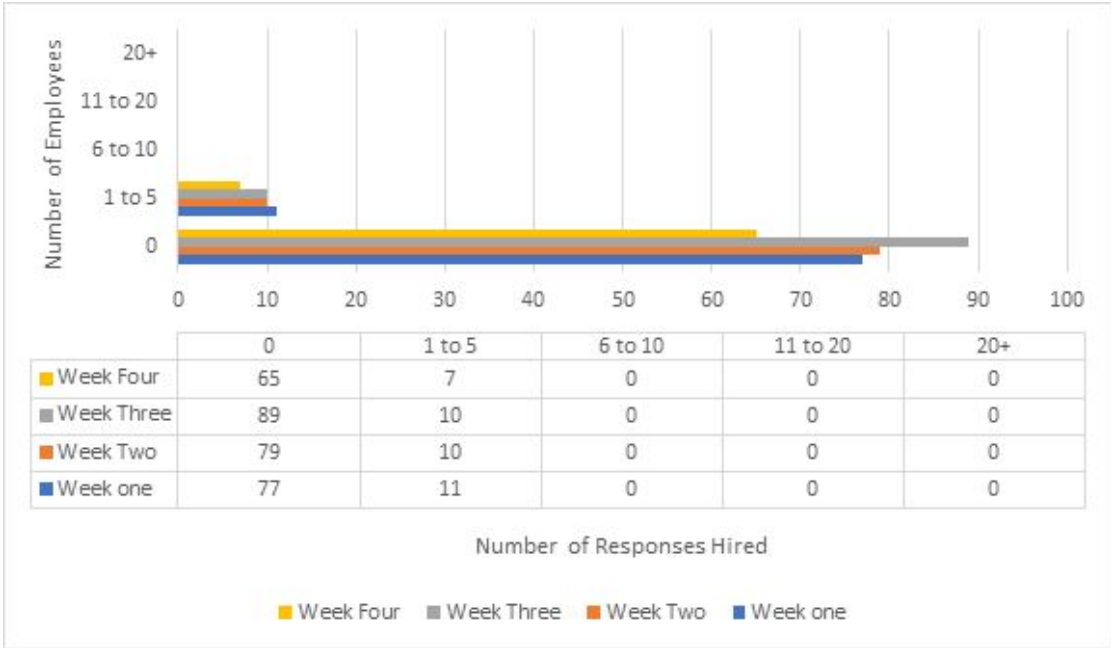


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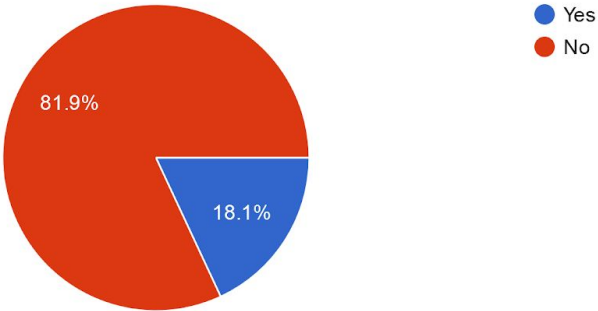
Most workplaces are still not letting employees go permanently. 32 employees were reported as permanently laid off in week 4.



And yes, some manufacturers are still hiring. 9 employees were hired in the past 7 days by 10% of our respondents (13 employees were reported hired last week).



We added a question to ask how many workplaces are paying some kind of premium to their employees as an incentive to keep them actively working. Just under 1/5th have decided to offer some kind of premium. We will also track this going forward.



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

Manufacturers are continuing to take advantage of the Canada Emergency Wage Subsidy program, deferring remittance of taxes & duties and of products from EDC & BDC. The most commonly mentioned programs across each week, however, were still EI & SR&ED.

	Wk 1	Wk 2	Wk 3	Wk 4		Wk 1	Wk 2	Wk 3	Wk 4
Workshare	5	13	11	5	SWODF	2	11	10	7
EI	4	49	42	33	EDC/BDC	1	22	23	13
O-AMP	4	4	6	3	OCE	1	3	4	6
IRAP	3	9	6	6	COJG	1	10	8	5
SR&ED	3	36	43	30	Mitacs	1	2	4	3
FEDDEV	2	9	5	7	NGEN	1	1	3	2
CEWS (Canada Emergency Wage Subsidy)			15	25	Business Credit Availability Program			3	3
Zero% Small Business Loan Program			9	6	Deferral of remittance of WSIB, EHT, HST, income tax, duty			24	18
US COVID relief programs			4	4					

Biggest Impact on Canadian Business to Date:

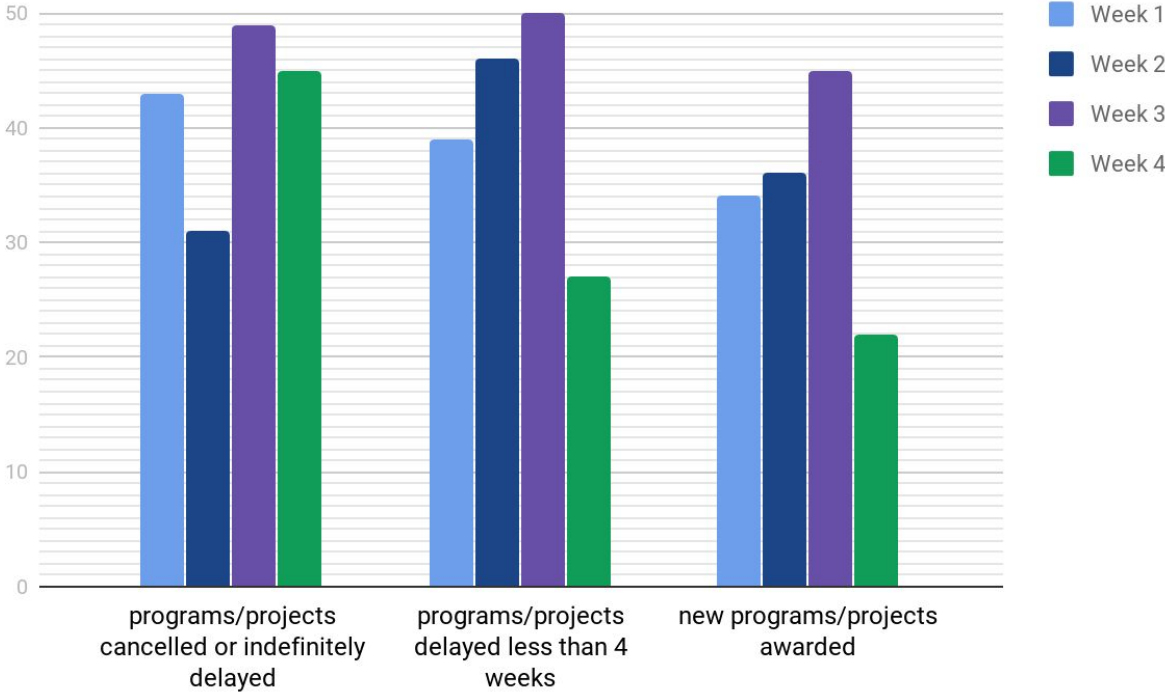
Each week, the biggest impacts reported were from employee anxiety, employee protection and declining sales. In other words, the mental & physical health of workforces are having a significant impact on their businesses as is the rapid decline in sales as it becomes increasingly difficult to fulfill current orders and obtain new work.

This week, employee anxiety still tops the list. Project cancellations and delays are also impacting our manufacturers, while cash flow is understandably affecting a large portion of our respondents.

	Wk 1	Wk 2	Wk 3	Wk 4		Wk 1	Wk 2	Wk 3	Wk 4
Employee Anxiety	16	70	71	47	End of Face-Face Meetings	3			
Project Cancellation or Delay	16	24	37	28	Extra Costs	2			
Employee Protection	17	48	40	22	US Exchange rate (declining Canadian dollar)	2			
Declining Sales	15	33	48	42	Completing Current Projects	2	18	21	14
Travel Barriers	6	21	24	15	Media	1			
Disruption	6	26	25	20	Efficient Collaboration With at Home Workers	1			
Plant Closures	5	17	24	13	Massive Market Decline	1	14	20	19
OEM Shutdowns	4	22	31	15	Lack of Government Direction	1			
Cash Flow	3	31	36	25	Border Backups	1			
Supply Chain Delays	3	20	25	10	Cancelation of Classes & a Hold on Succession	1			

Level of interruption/disruption to the sales pipeline

It's difficult to compare these week over week as we had fewer respondents this week. Looking at the trend though, this week we're seeing more project cancellations and a slowing of delays and new programs compared to prior weeks.



Top Challenges in the coming month:

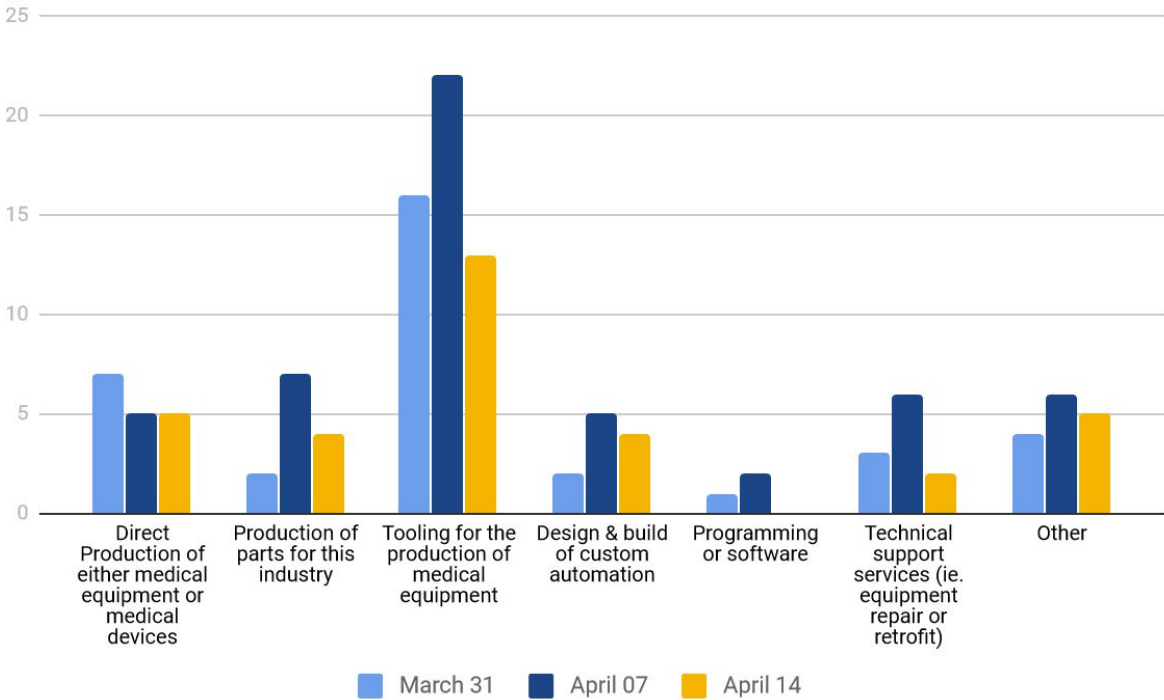
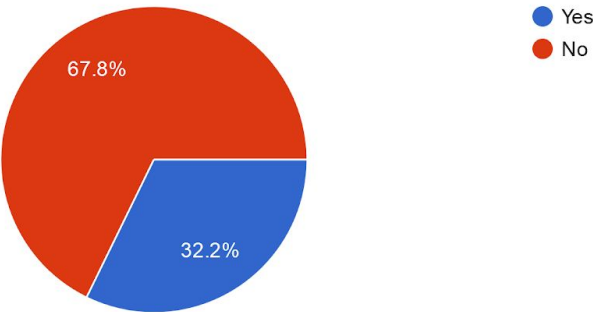
What is manufacturing worried about for the future?

For the past 4 weeks, we've seen that while cash flow worries are still top of mind, employee mental & physical health still keep our manufacturers up at night, , along with cancellation of projects and reduced demand.

	Wk 1	Wk 2	Wk 3	Wk 4		Wk 1	Wk 2	Wk 3	Wk 4
Cash Flow	52	52	63	50	Completion of Current Work	11	12	18	9
Employee Retention	27	21	17	15	Economy	8	36	26	23
Health and Safety	21	29	37	28	Off Site Employees	8			
Supply Chain	18	17	22	9	Finding Employees	8	5	8	3
Employee Morale	17	38	39	39	Border Crossing/Travel restrictions	6	13	16	21
Cancellation of Future Work	17	26	32	28	Managing Change	8	9	9	7
Shutdown Effects	15	25	26	19	Transportation of Goods	5			
Reduced Demand	11	32	35	29	Cybersecurity	1			

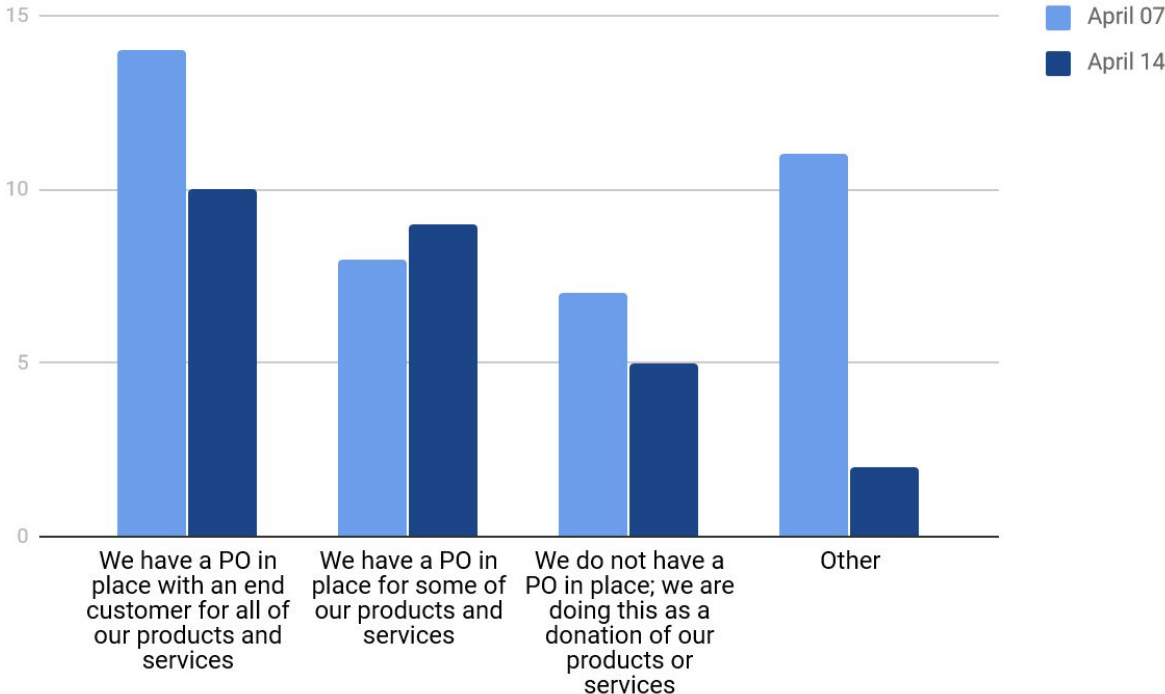
Since last week, has your business expanded existing products and services to the medical sector, or added new products or services for the manufacturing of medical devices or medical equipment?

In week 1, 75% of our respondents said they were willing and able to supply products or services for medical equipment or devices. This past week, one third of respondents have been able to answer the call for their services or products, mostly in the production of tooling for medical equipment manufacturing.



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Knowing that we are in the process of pivoting to help address the need for medical equipment, we wanted to know how many companies are working under a PO and how many are donating their products and services. 19% of our respondents are donating their products or services, while 73% are working under a purchase order.



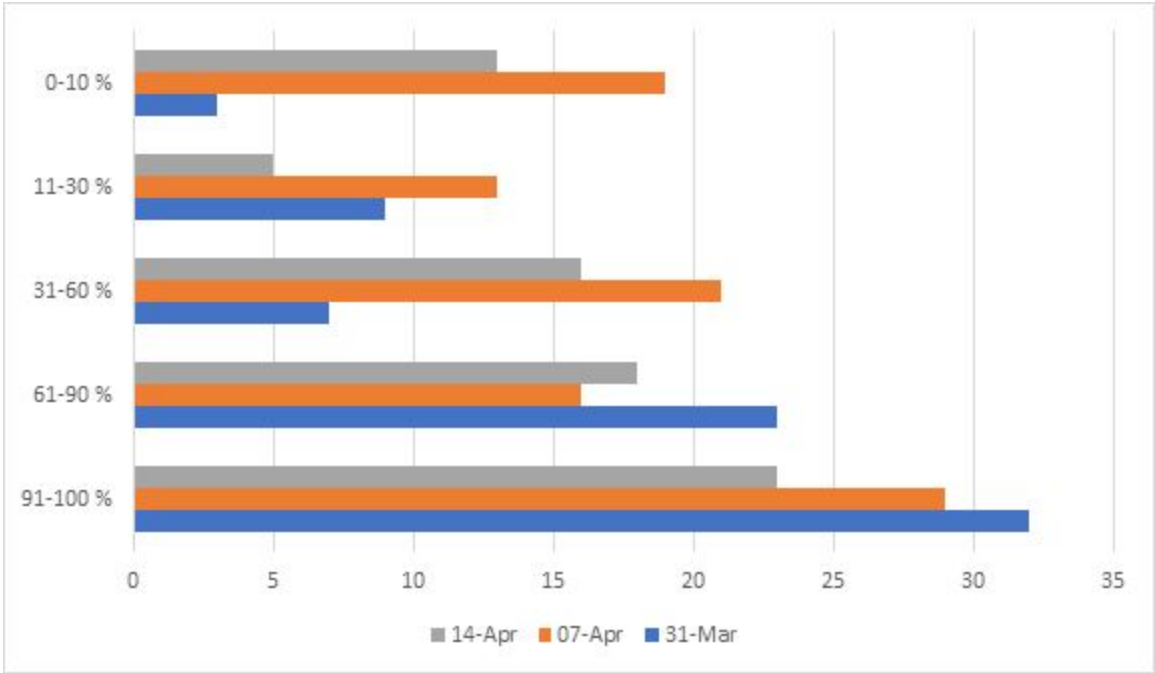
In terms of online registration to supply products/services, innovations and ideas to the government, the majority are primarily using the federal site.

	04/07	04/14		04/07	04/14
Canadian government "Buy and Sell"	13	17	Ontario provincial – for ideas	5	4
Ontario provincial – for supplies	5	9	Other	2	2
Ontario provincial – for innovation	5	1	NGEN (Supercluster)		4
OCE		7	NRC-IRAP		4

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We asked about the level of shutdown at our manufacturers. Respondents were asked to indicate the percentage of operations they are currently at. In other words, 100% means they have had no reduction in operations; 0% means they are completely closed.

The increases we've seen in workplace shutdowns have slowed - a positive development this week. 30% of our respondents are at over 90% of full operations. The number of workplaces that are completely (or almost completely) shut down remained fairly consistent this week at 17%.



We also asked why they've shut all or some of their operations down. Shutdowns were due primarily to employee absences, loss of work and health & safety concerns.

