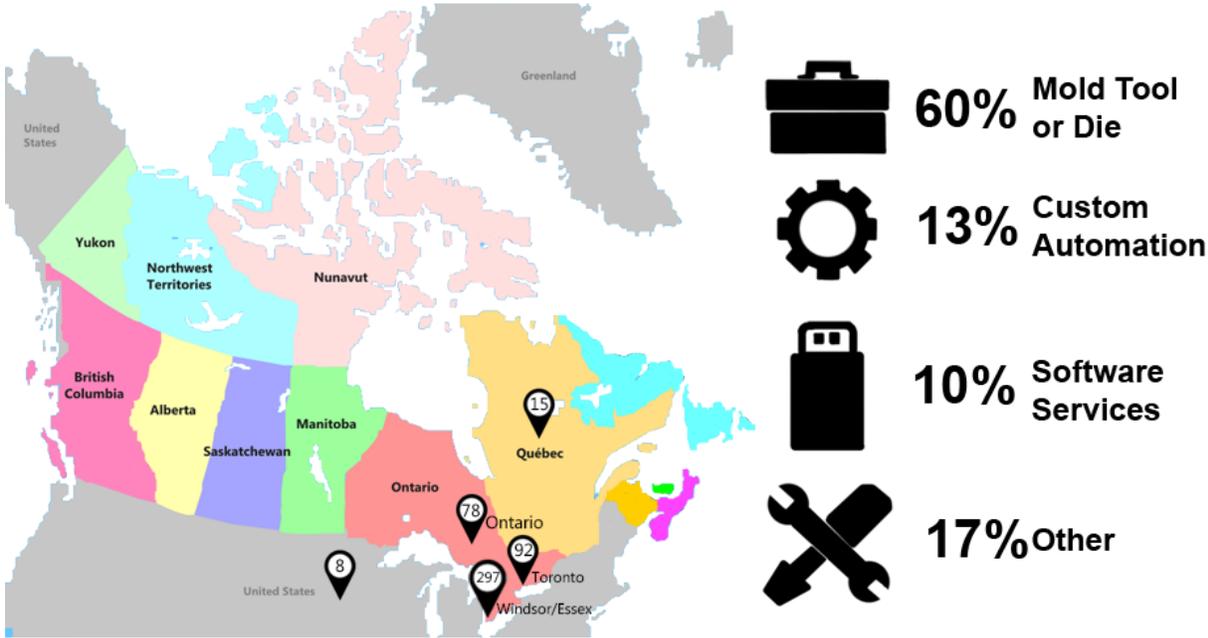


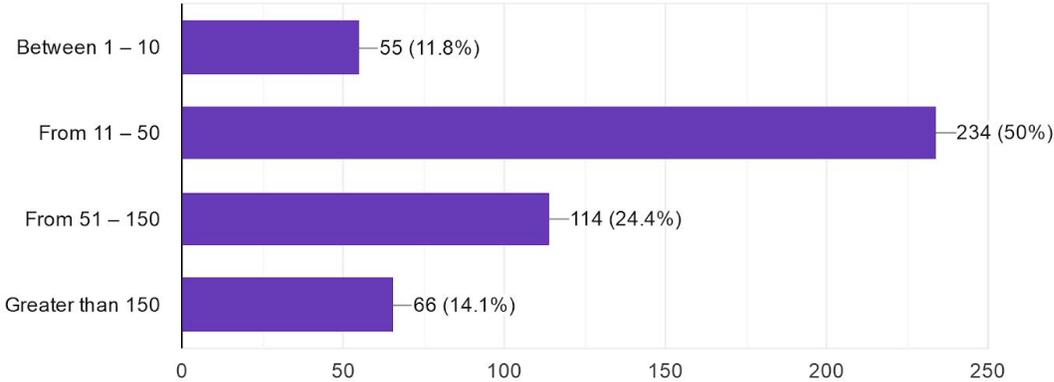
Survey conducted by CAMM and Automate Canada with a total of 61 responses for the Week Six survey (470 responses in total to date).

**Location and primary business activity of our respondents to date**



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

62% of our respondents are small companies, with between 1 - 50 employees.

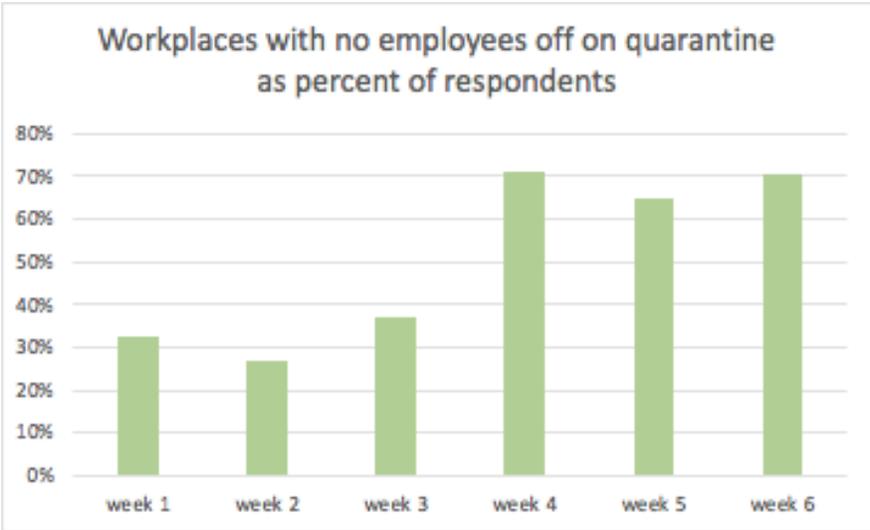
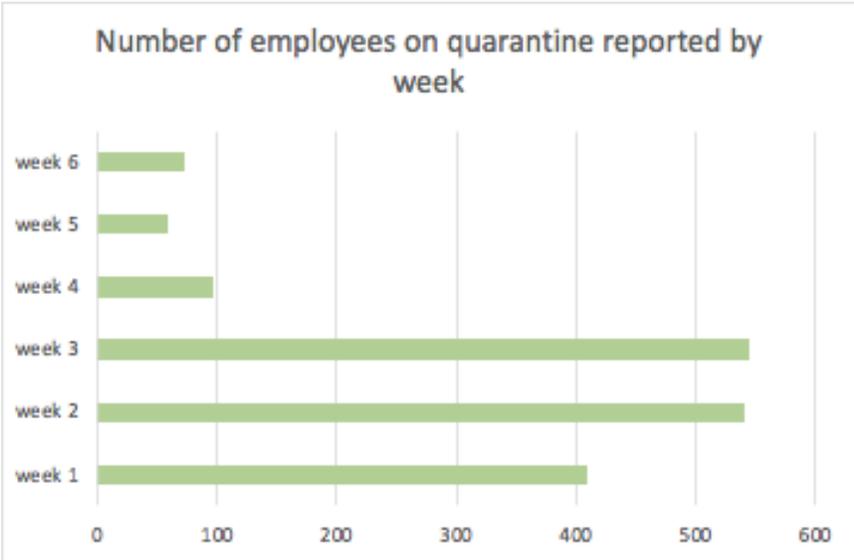


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**Direct impact reported on the workforce:**

**Mandatory Isolation or Quarantine:** The number of employees out of the workplace due to isolation or quarantine is up this week - up to 73 in total (compared to 58 last week).

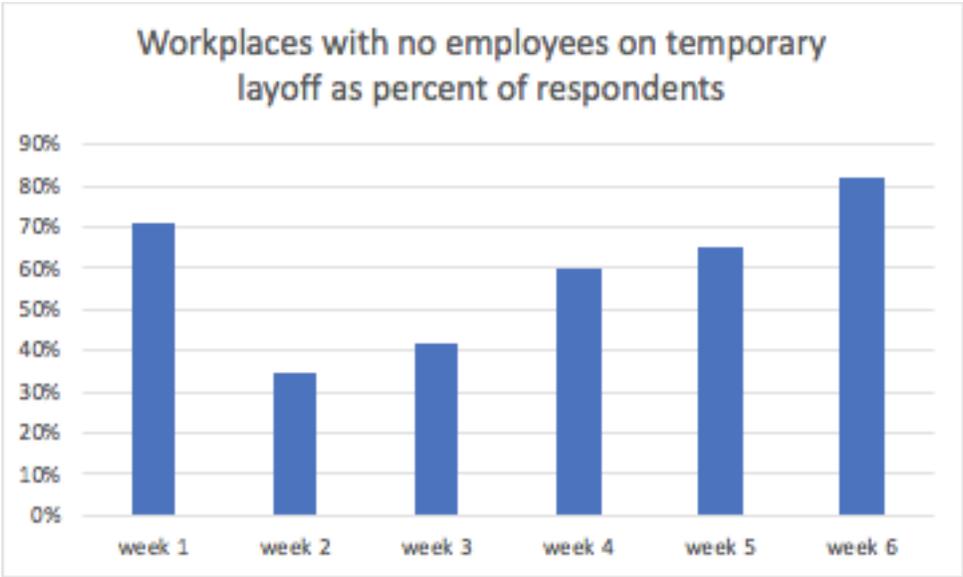
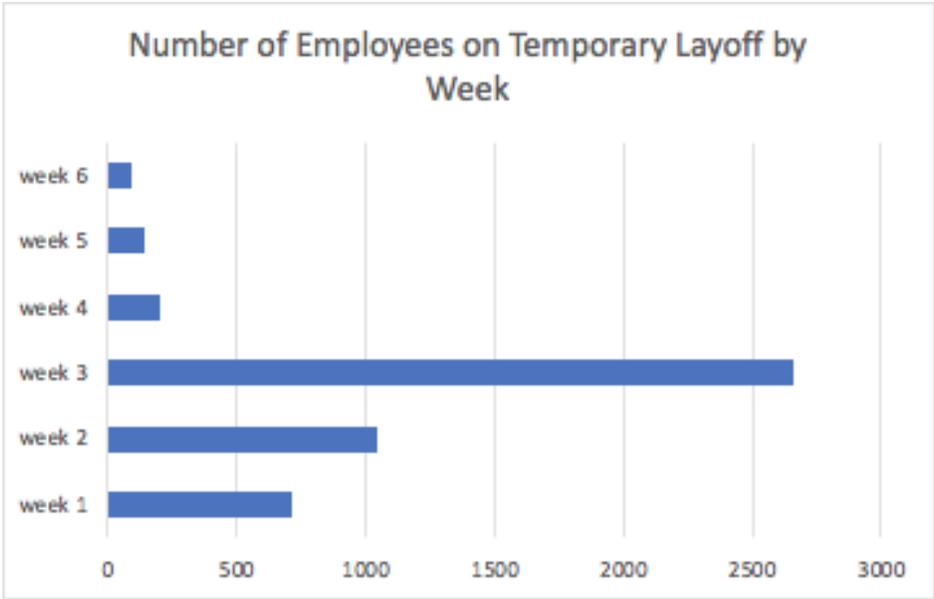
43 manufacturing workplaces reported having no employees on quarantine.



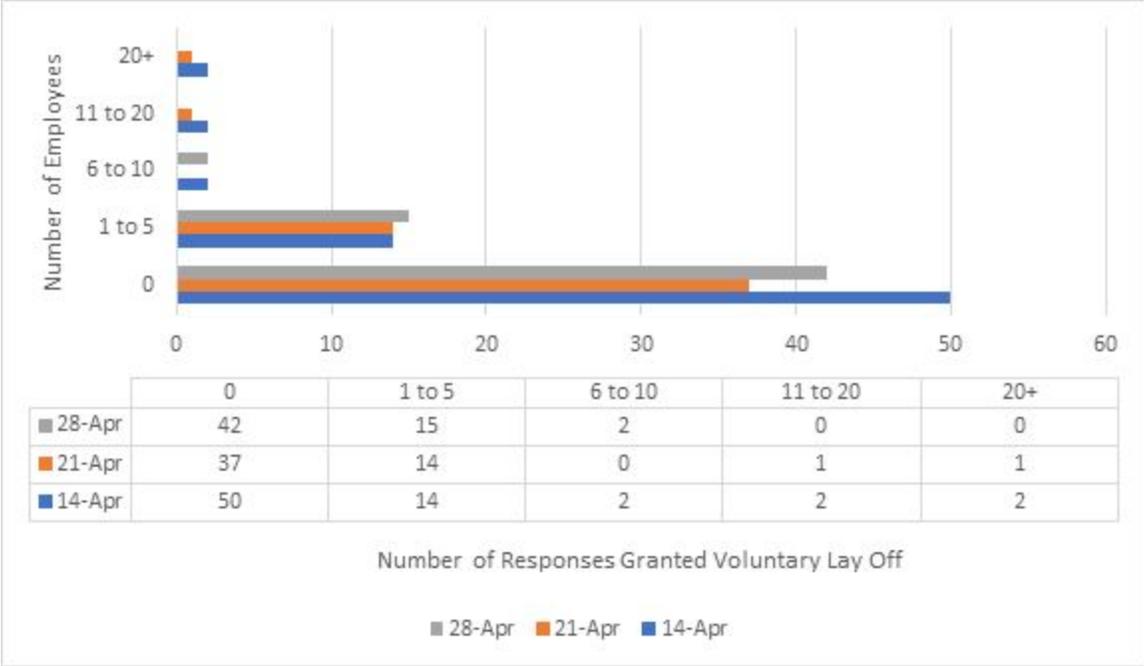
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**Temporary Layoffs:** 50 workplaces laid off no workers this week. In another positive trend, this increased from last week, where 46% of our respondents had not laid anyone off.

The number of employees laid off also decreased this week, declining to a total of 90 employees laid off temporarily, compared to 143 in week 5. Even with fewer participants in this week’s survey, this still shows a sharp decline in temporary layoffs and demonstrates that employee counts have stabilized.

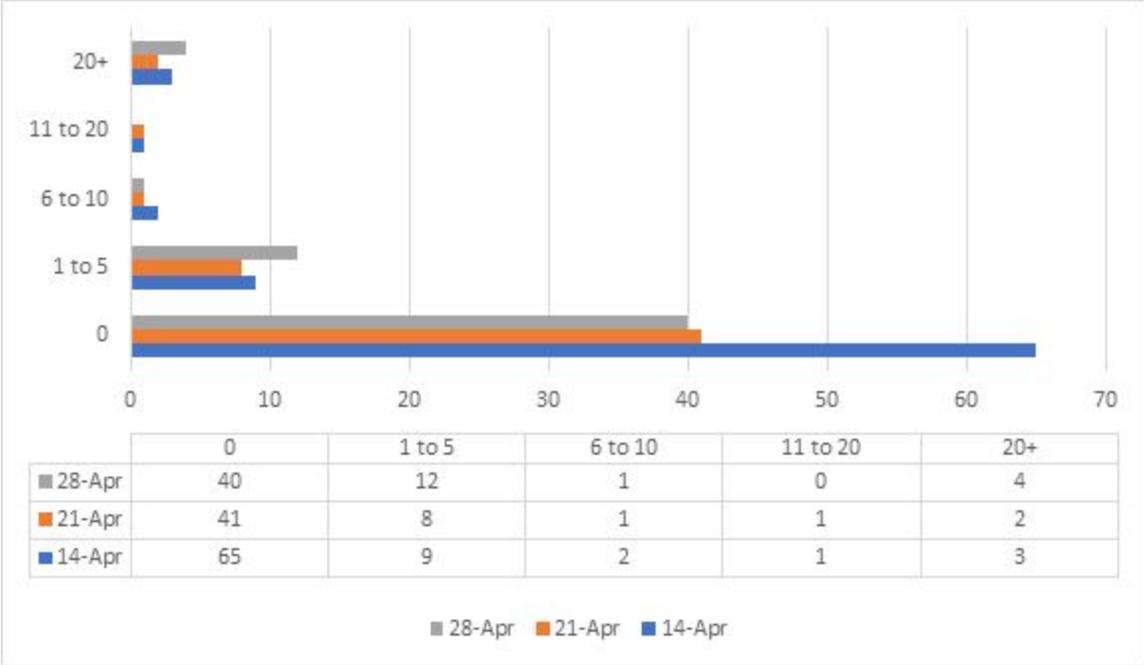


**How many employees were granted voluntary layoffs:** In total, 43 employees were reported as off on layoff at their request. 82% of our respondents represent workplaces with zero voluntary layoffs last week.



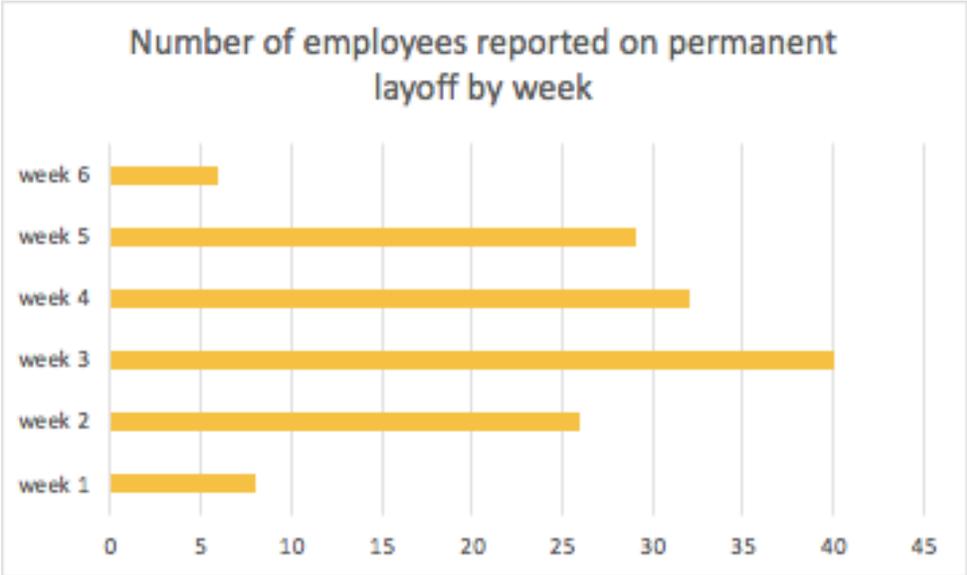
**What about employees who have received full or partial wages, but were not actively working?** In the past 7 days, there were a total of 515 “furloughed” employees, up from the 395 reported as furloughed last week. This was our largest category this week in terms of employment impacts, undoubtedly facilitated by the impact of CEWS.

Interestingly, 2/3rds of the workplaces reported no furloughed employees last week, which means the 515 were concentrated in just 1/3rd of our respondents.



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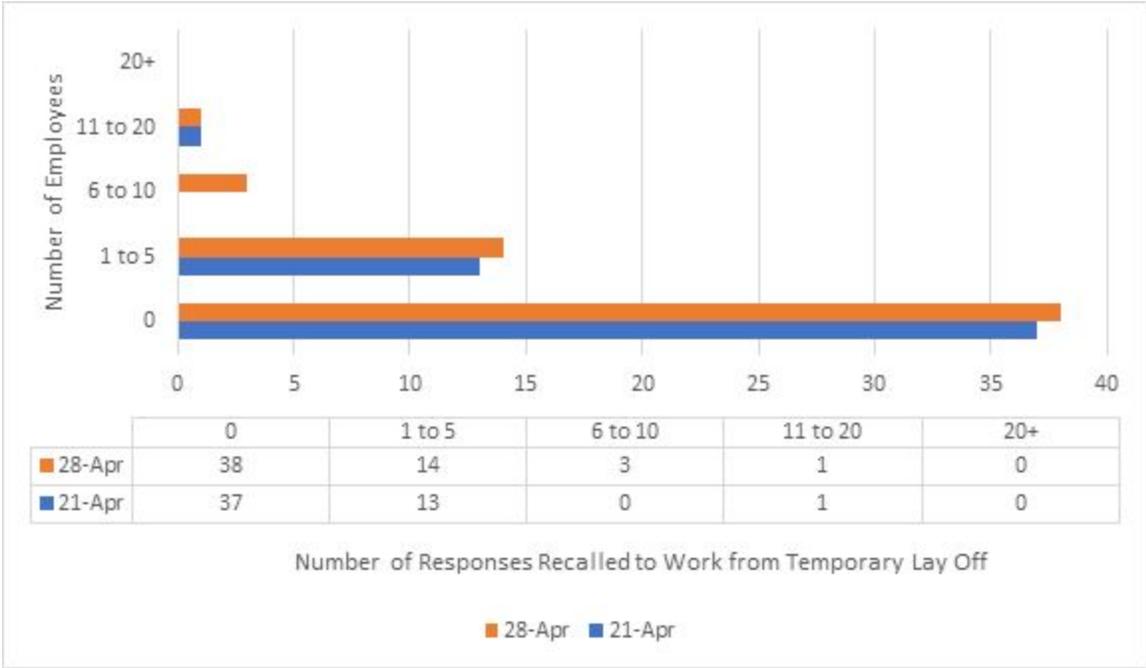
**Most workplaces are still not letting employees go permanently.** 6 employees were reported as permanently laid off in week 6, down from 29 the week prior. From week to week, only 10% of workplace reported permanent layoffs.



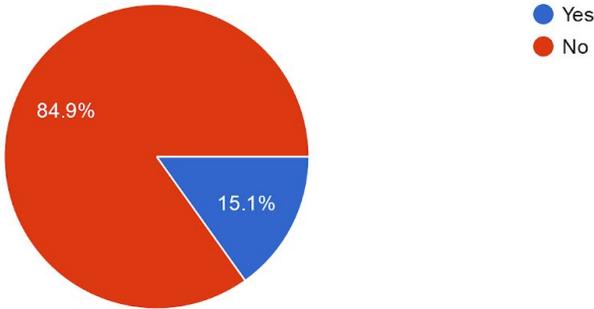
Manufacturing continues to hire, albeit at a slow pace. This week, respondents reported hiring 8 new employees.



**Two weeks ago, we added a question to ask how many employees have been recalled in the prior week from temporary layoff.** And the good news is that they continue to recall employees - 60 to be exact were reported as recalled by 30% of our respondents this week. This is up from the 43 reported as recalled last week.

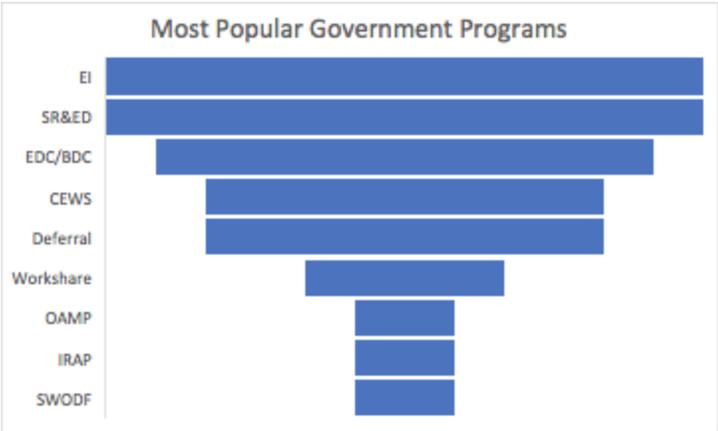
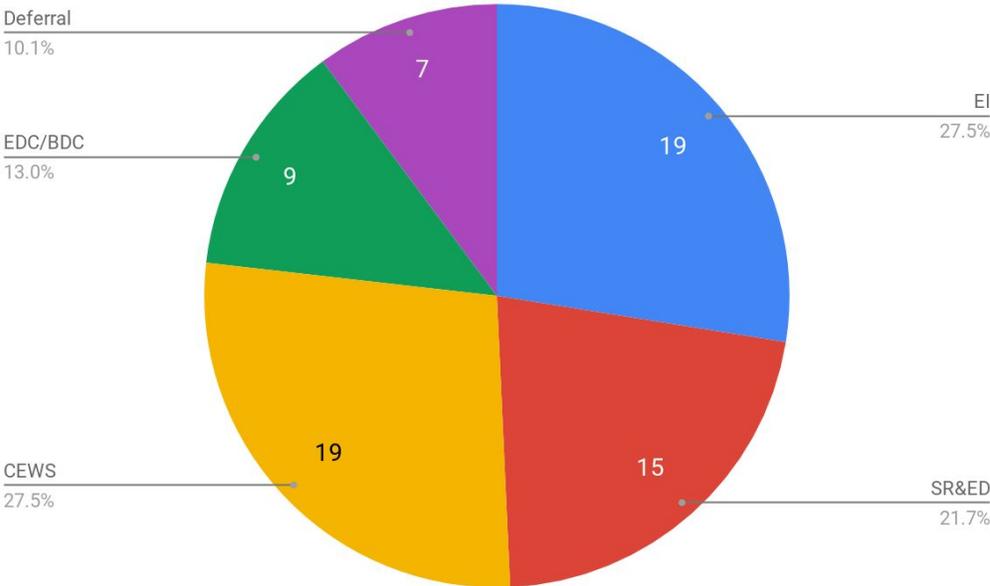


**We asked how many workplaces are paying some kind of premium to their employees as an incentive to keep them actively working.** 15% have decided to offer some kind of premium, consistent with what we've seen in the past 3 weeks.



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

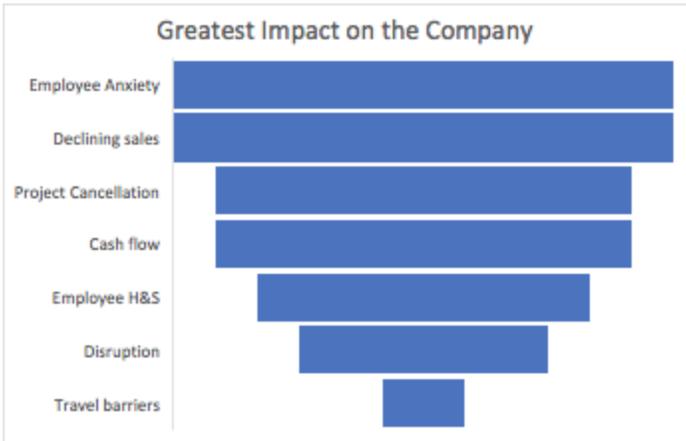
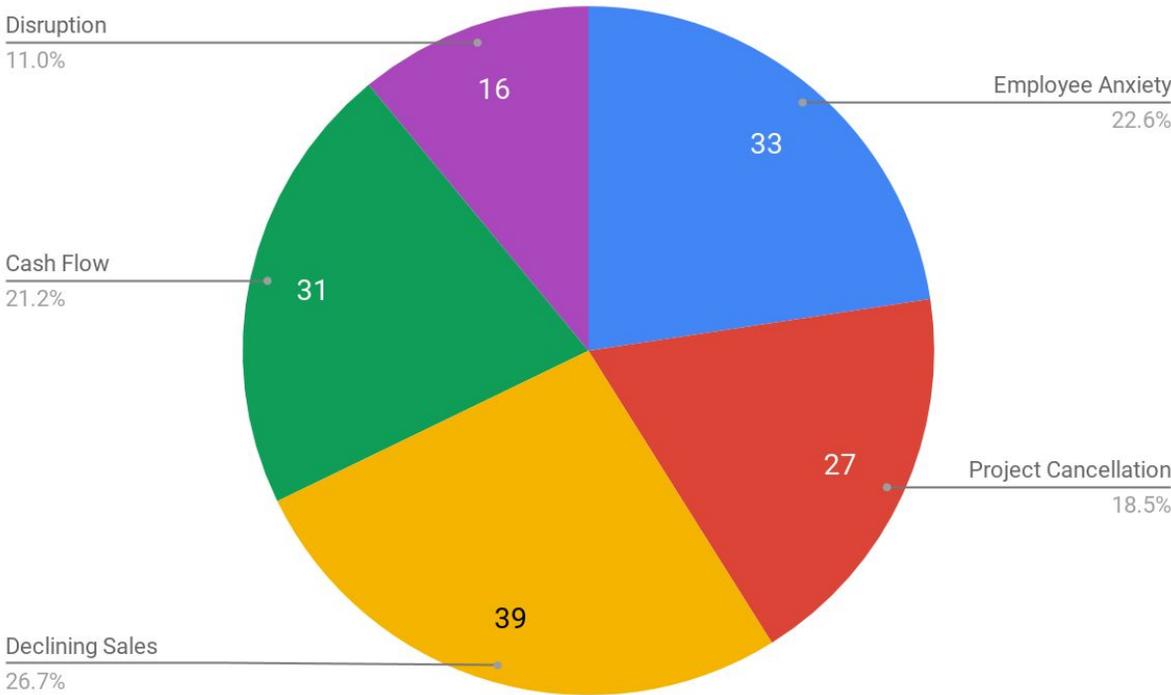
It seems the federal government really hit on a success with CEWS, which moved to the top of this list this week, tied with EI as the most popular program. Manufacturers are continuing with their R&D programs through SR&ED support, and accessing programs through EDC & BDC, along with deferring remittances to preserve cash flow.



Over the past 6 weeks, the programs listed in the top five are shown above by frequency

**Biggest Impact on Canadian Business to Date:**

Our respondents continue to be impacted by the double whammy of declining sales & tightening cash flow. They're still impacted by employee anxiety, which is no doubt heightening as the return to full operations approaches. General disruption and project cancellations were in the top five again this week

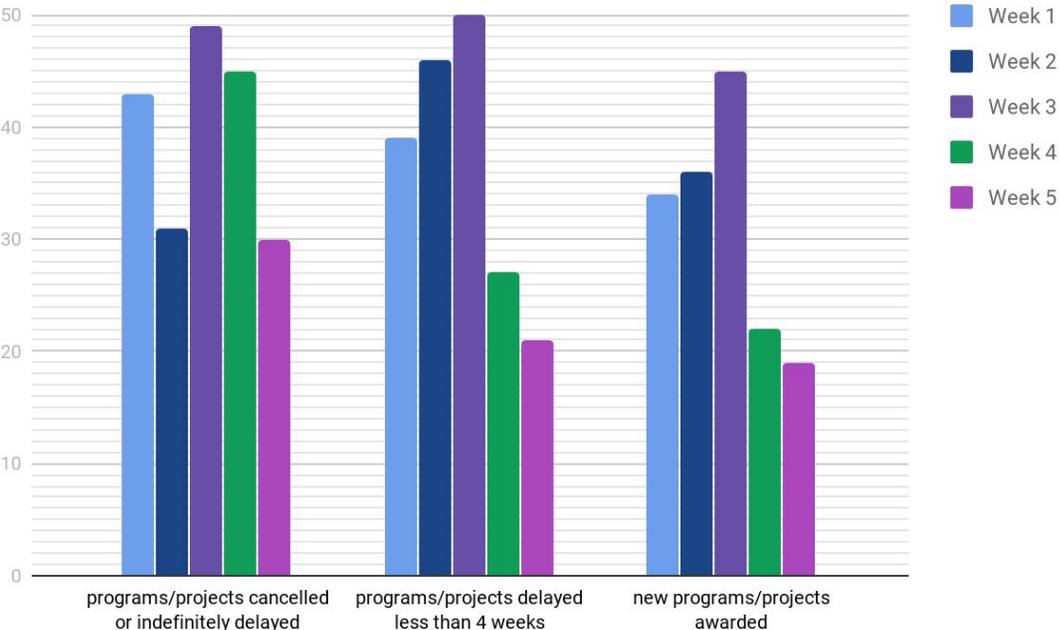


Over the past 6 weeks, the programs listed in the top five are shown above by frequency

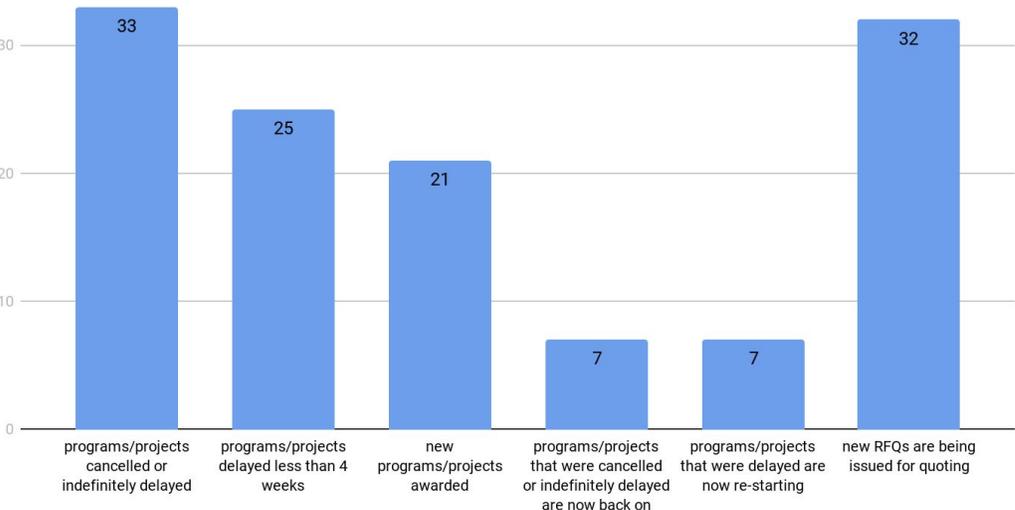
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**Level of interruption/disruption to the sales pipeline**

It's difficult to compare these week over week as response rates vary. Looking at the trend though, we're still seeing project cancellations dominating the list with temporary delays and new order levels picking up slightly compared with last week.

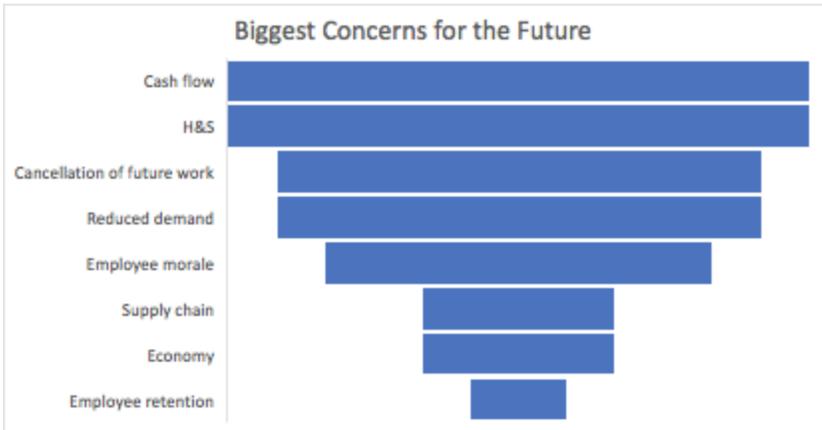
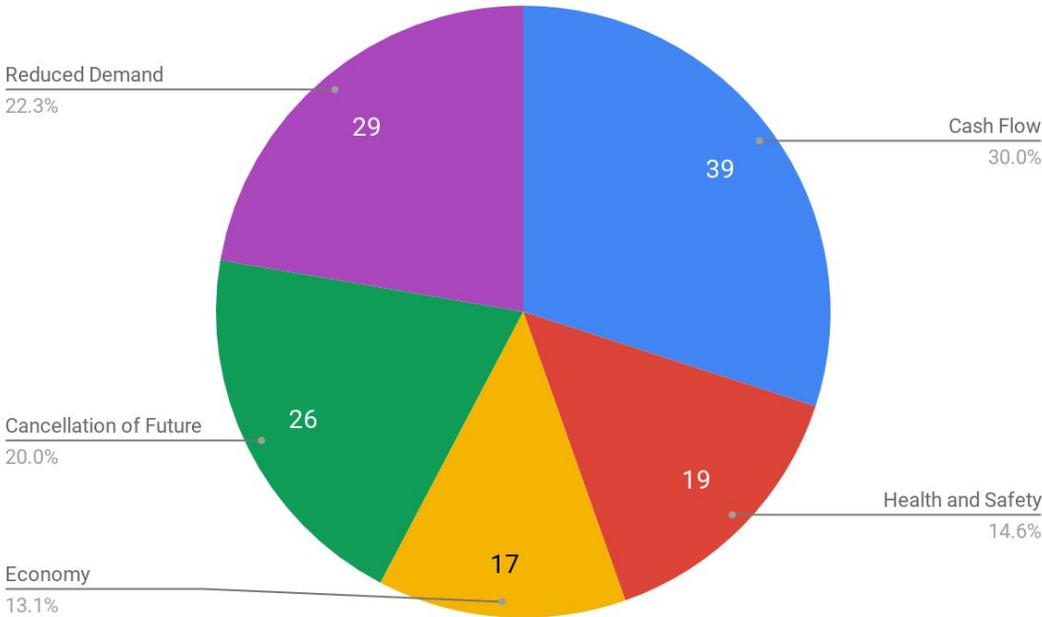


We added three choices to this question in week six in order to get a sense of if things are restarting as we've heard. Requests for quote, or RFQs, are up at a level higher than temporary delays and almost equal to cancellations, which is good news.



**Top Challenges in the coming month: What is manufacturing worried about for the future?**

For the past 6 weeks, cash flow has consistently been king. This week, reduced demand and cancellation of future projects worry our mold, tool, die & industrial automation firms. The economy & workplace health & safety continue to be in the top five

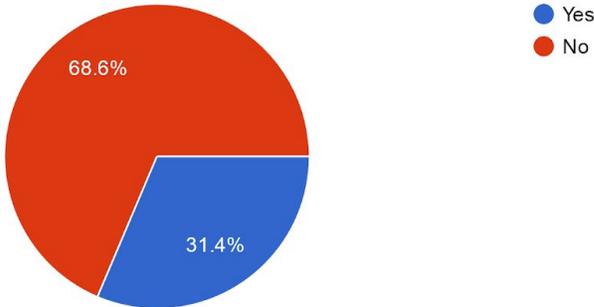


Over the past 6 weeks, the programs listed in the top five are shown above by frequency

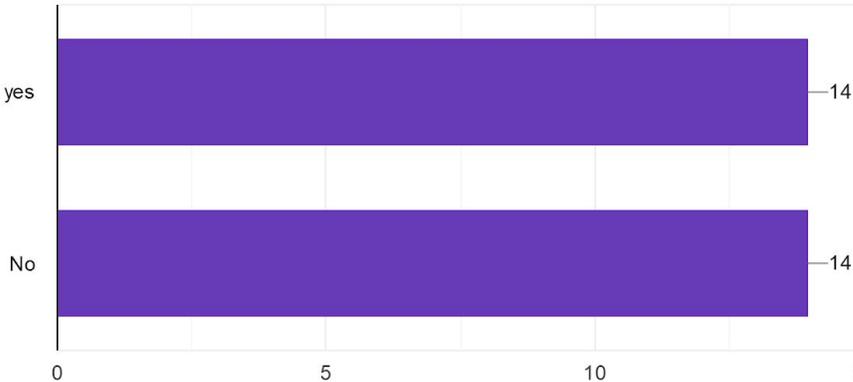
**Since last week, has your business expanded existing products and services to the medical sector, or added new products or services for the manufacturing of medical devices or medical equipment?**

In week 1, 75% of our respondents said they were willing and able to supply products or services for medical equipment or devices. For each of our subsequent survey weeks, about 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.

Half of the companies who have pivoted to either expand or add products & services for medical equipment manufacturing plan to continue service that sector; this is excellent diversification news.



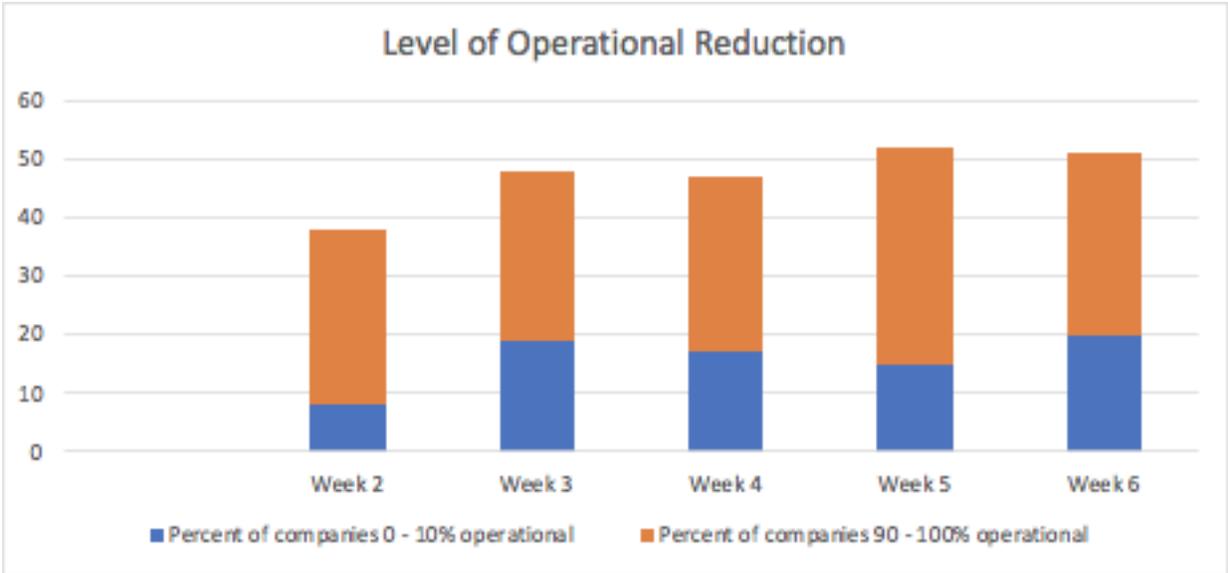
If you answered “yes” to the question above, do you intend to continue to work in the medical device/equipment manufacturing sector permanently, as part of your company’s diversification strategy?



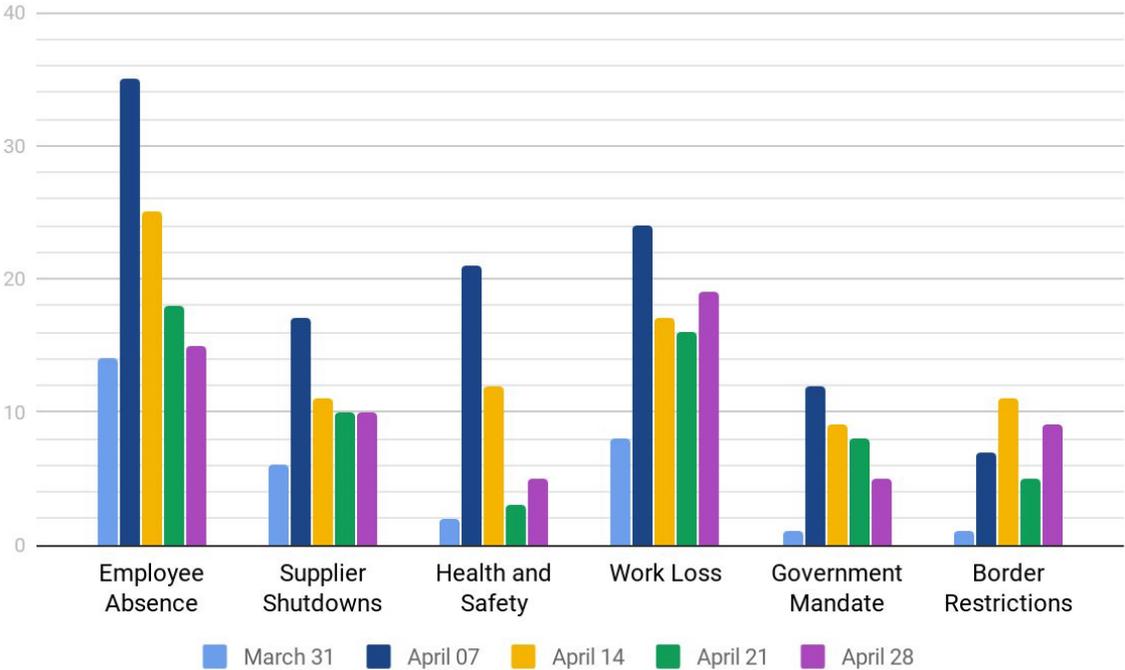
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**We asked about the level of shutdown at our manufacturers.** Respondents were asked to indicate the percentage of operations they are currently at. In other words, 100% means they have had no reduction in operations; 0% means they are completely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

We've been tracking this statistic since week 1. The percentage of respondents reporting over 90% of full operations has been fairly consistent at about 1/3rd for the past 5 weeks, dropping slightly week over week this week. On the flip side, the percentage of respondents shut down, or almost completely shut down, increased to 20% this week (up from 15% last week). This seems contrary to the various industries preparing to support a ramp up of manufacturers, but could be tied to the high numbers of furloughed employees.



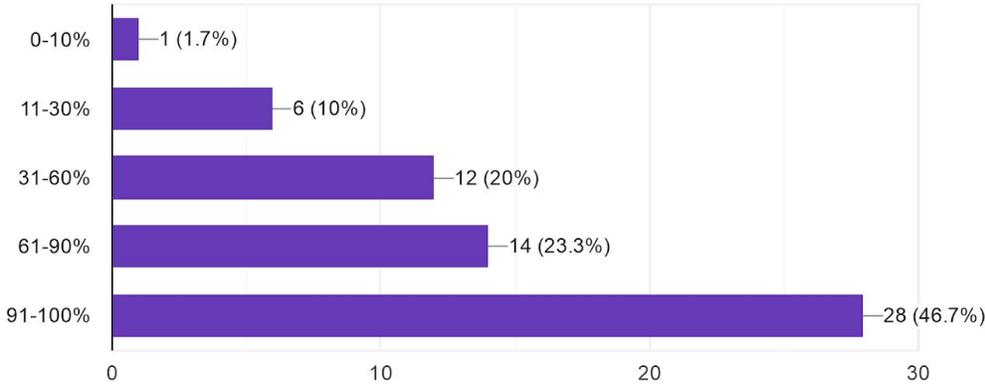
**We asked why they've shut all or some of their operations down.** Shutdowns were due primarily to employee absences & loss of work, with this being the first week that "loss of work" was the most frequently listed reason. Supplier shutdowns and border restrictions were a close third & fourth in importance as we look to ramping up in response to the re-opening of shuttered manufacturing plants.



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**This week, we added questions to assess the level of readiness to ramp up.**

With an eye to the start up at major manufacturers tentatively planned for May 4th, what level of operations do you expect to be at by the end of this week ie. May 1st. Almost half of our respondents predicted they will be at over 90% of full operations by the end of this week.



Where are you in your preparedness level for increased operations?

04/28



**We asked about any positive outcomes that have occurred as a result of this crisis.**

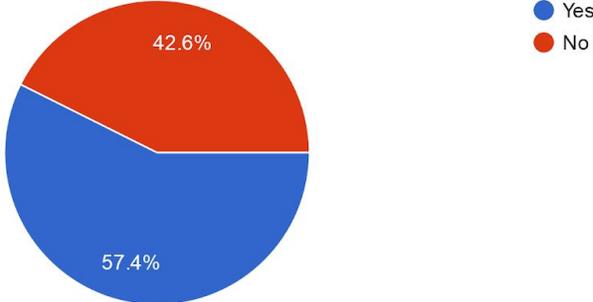
They told us that the increased level of government programs is positive, along with improved collaboration within their company, diversification of their markets, improved connection to government services, adoption of new technologies and better workplace health & safety:

	04/21	04/28		04/21	04/28
Availability of more government programs	16	14	Improved health & safety in the workplace	12	30
Increased collaboration within your company	15	23	Improved employee engagement	11	18
Market/customer diversification	14	8	Increased operational efficiency	6	15
Better connection to government services	13	13	Supplier diversification	4	7
Adoption of new technologies	12	14	Greater investment in R&D	0	3

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**This week, we added questions about the planned return to full operations.** We had heard that there were problems accessing PPE for manufacturers, and this first question confirmed it. 43% of our respondents said they do not have sufficient PPE in their workplaces.

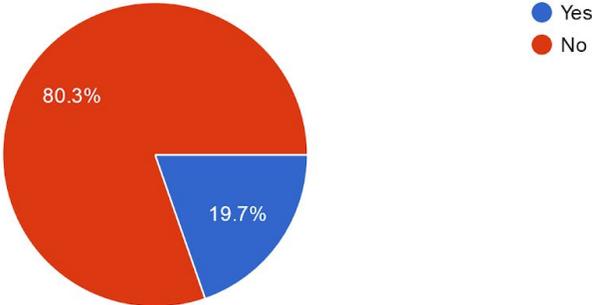
Do you have sufficient PPE (Personal Protective Equipment) specific to the prevention of virus spread in your workplace?



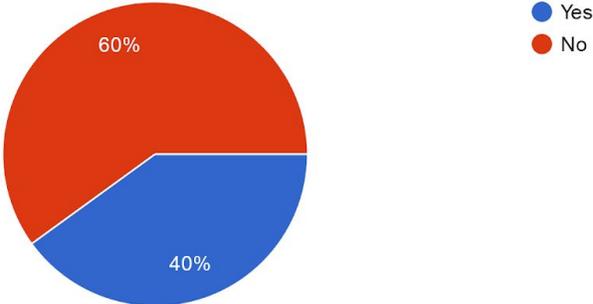
**Workplace screening with a temperature sensing device is a recommended best practice.**

Only 20% of our respondents are currently using one and only 40% currently plan to use one.

Are you currently using a temperature sensing device to screen employees for fever at your workplace?



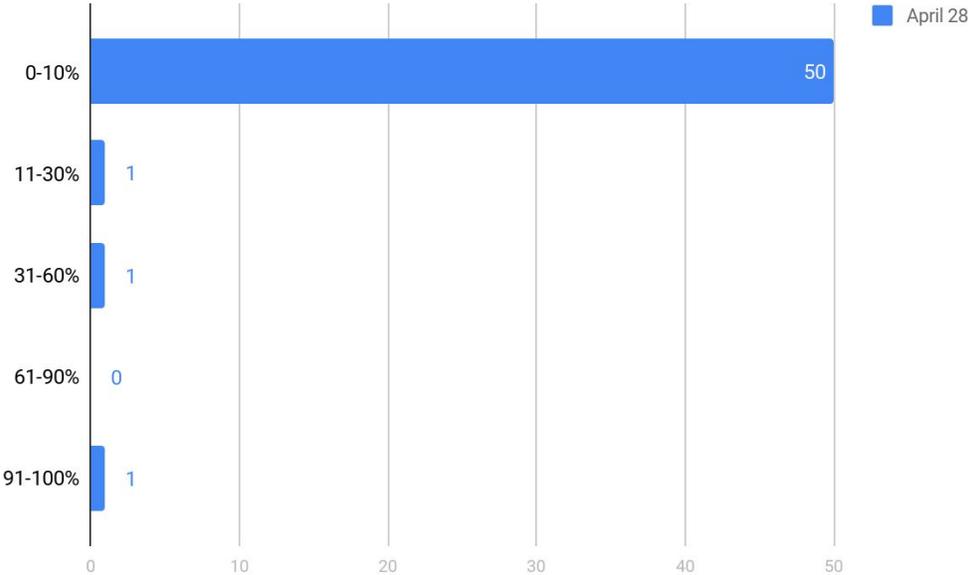
Do you plan to use a temperature sensing device to screen employees for fever at your workplace prior to increasing operations?



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**We also added a question to help gauge how successful processing of applications for EI benefits has been, as we were told that problems are being experienced as Service Canada reviews applicants.** It looks like only a handful of companies are getting calls for clarification from Service Canada and none of the applications will be declined.

Of the total ROEs (Record of Employment) that you have issued for employees in the past 6 weeks, what percentage of them resulted in calls from Service Canada to either clarify the information that was included or to request more information



Of the ROEs that were questioned by Service Canada, what percentage will be declined as not eligible for EI (or other wage supports for workers offered by Service Canada)?

