



COVID-19 HAMILTON BUSINESS IMPACT SURVEY REPORT (April 15 - April 24, 2020)

PRESENTED BY:
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SURVEY SUMMARY

The City of Hamilton's Business Impact Survey #1 launched on April 15th and closed on April 24th

In collaboration with the City of Hamilton's Economic Development Division, three Chambers of Commerce (Hamilton, Stoney Creek and Flamborough), Workforce Planning Hamilton and 13 Hamilton Business Improvement Areas

SURVEY SUMMARY

Over nine days 1,040 respondents contributed qualified responses.

Qualified responses met the following conditions:

- The respondent accepted the terms and conditions of the survey;
- The respondent completed the questions requesting that they identify their Industry and the revenue impact on their business;
- Only one response would be permitted for each individual local business.

SURVEY SUMMARY

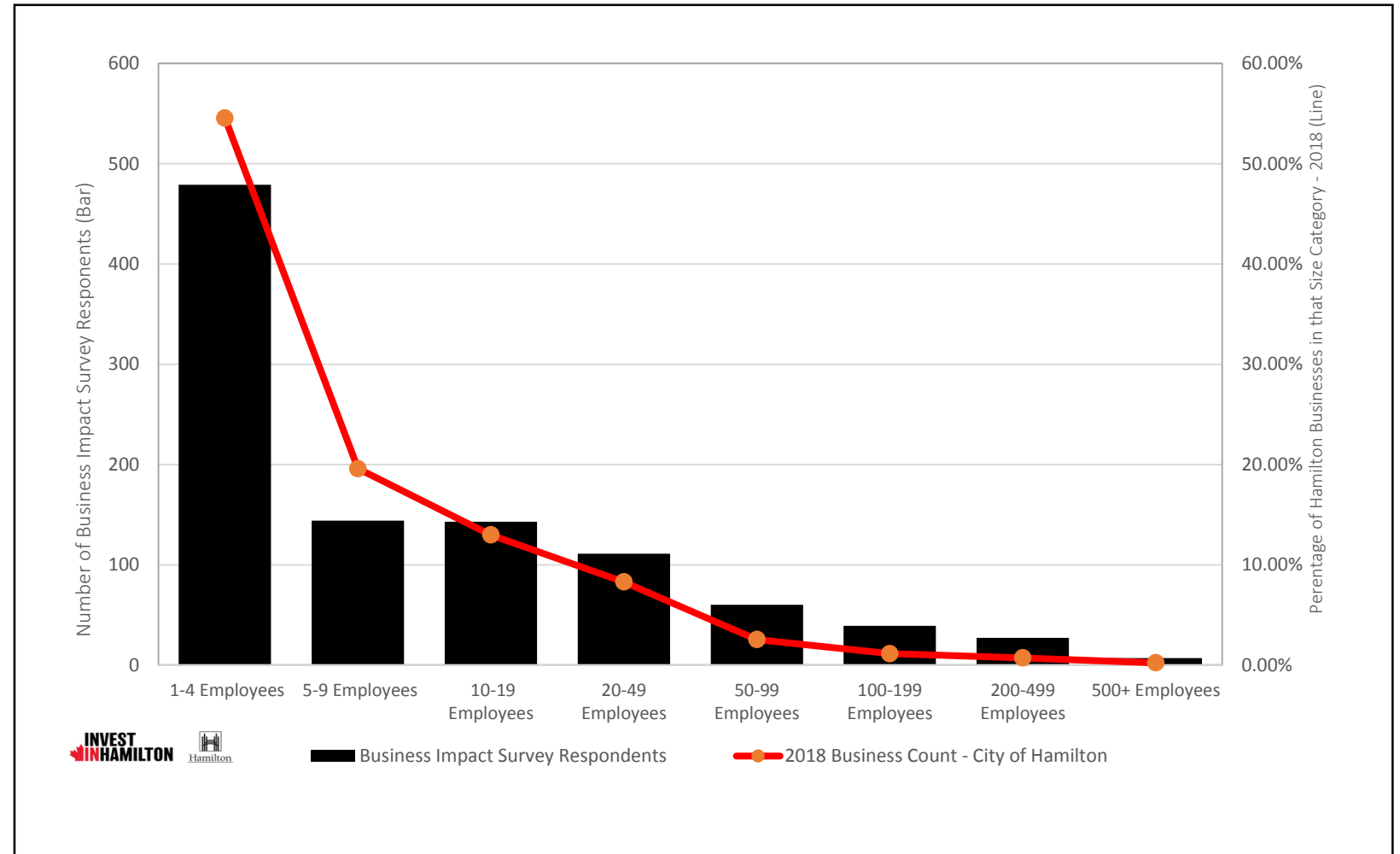
- A concerted effort was undertaken by the Business Impact Survey partners and other individuals through various social media channels encourage and enable any Hamilton based business owner to participate in the Business Impact Survey, and while the outcome of those efforts appear to have produced a fairly representative group of respondents, the Business Impact Survey did not pursue academic standards and methodologies to enable the results to be considered scientifically representative (such as random sampling, etc.).

KEY FINDINGS

- Businesses across all industry sectors, and across every business size category, have been significantly impacted by the COVID-19 pandemic and the resulting actions taken by governments around the world to mitigate the associated health impacts.
- The aggregated employment impact from all respondents who participated in the survey (who collectively represent approximately 35,000 employees) communicates an employment decrease of almost 13,000 jobs, which represents a city-wide decrease of 35.8%.
- Over 90% of respondents reported a decrease in revenue because of COVID-19, with over 50% of respondents indicating that the decrease in revenue was greater than 50% when compared to the month prior.
- Approximately 65% of respondents indicated that they have reduced their employment levels, with over 20% businesses reporting they have zero employees at the time they responded.

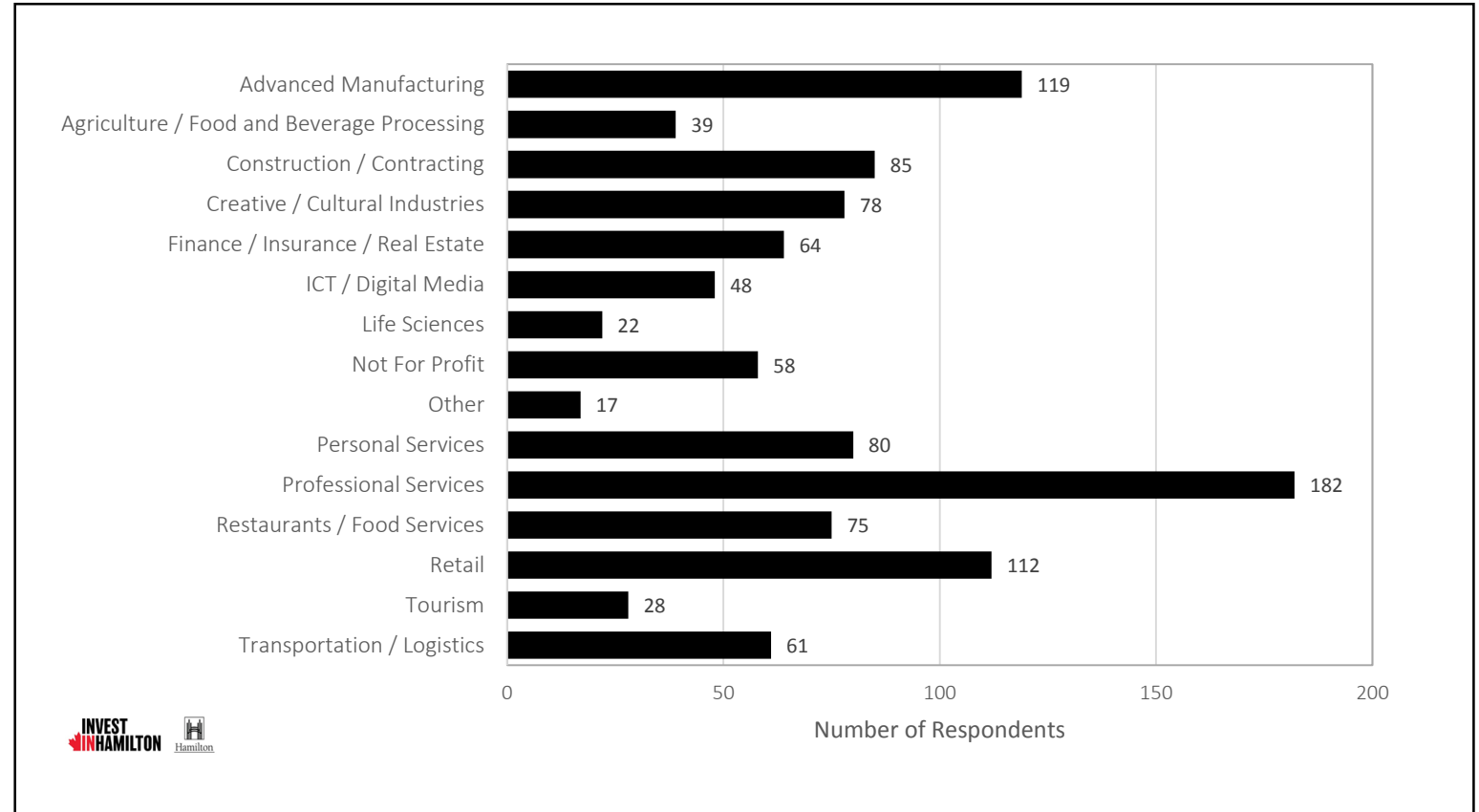
RESPONDENT DEMOGRAPHICS

DISTRIBUTION OF BUSINESS RESPONDENTS BY BUSINESS SIZE



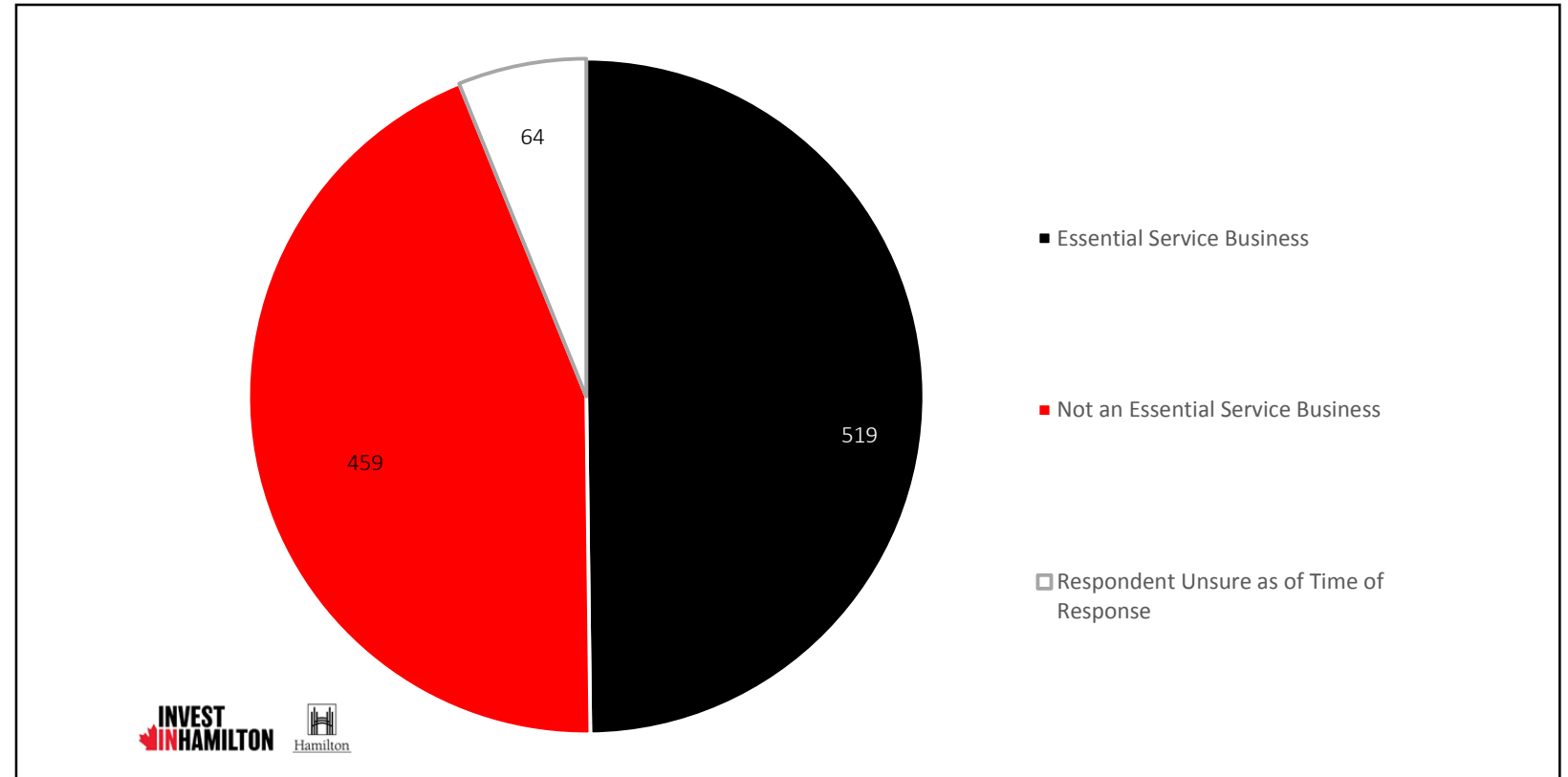
RESPONDENT DEMOGRAPHICS

DISTRIBUTION OF BUSINESS RESPONDENTS BY SECTOR



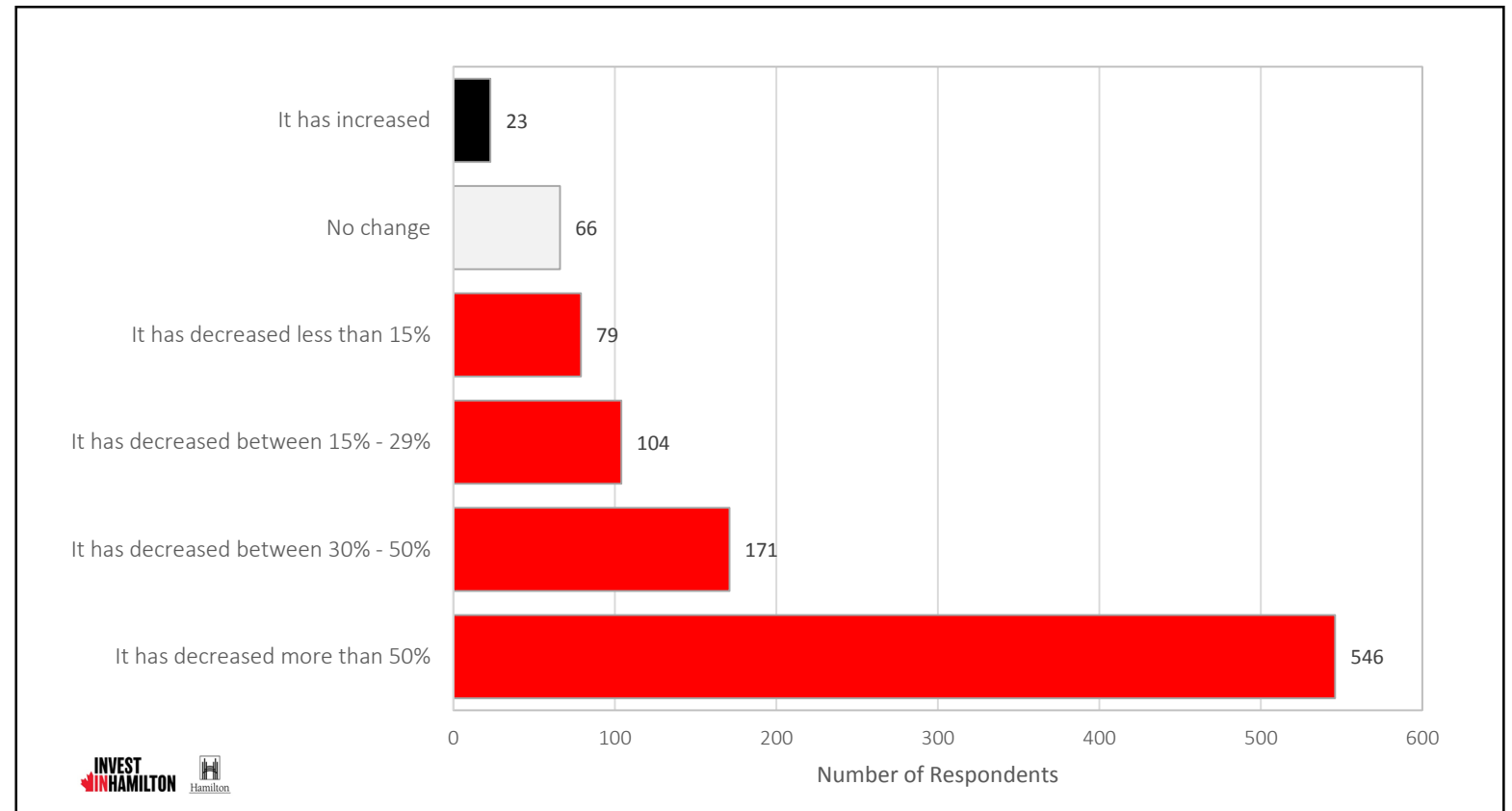
REPORTED NUMBER OF ESSENTIAL SERVICE BUSINESS (as of April 10, 2020)

RESPONDENT
DEMOGRAPHICS



IMPACT ON REVENUE

REPORTED IMPACT ON REVENUE (compared to previous month)



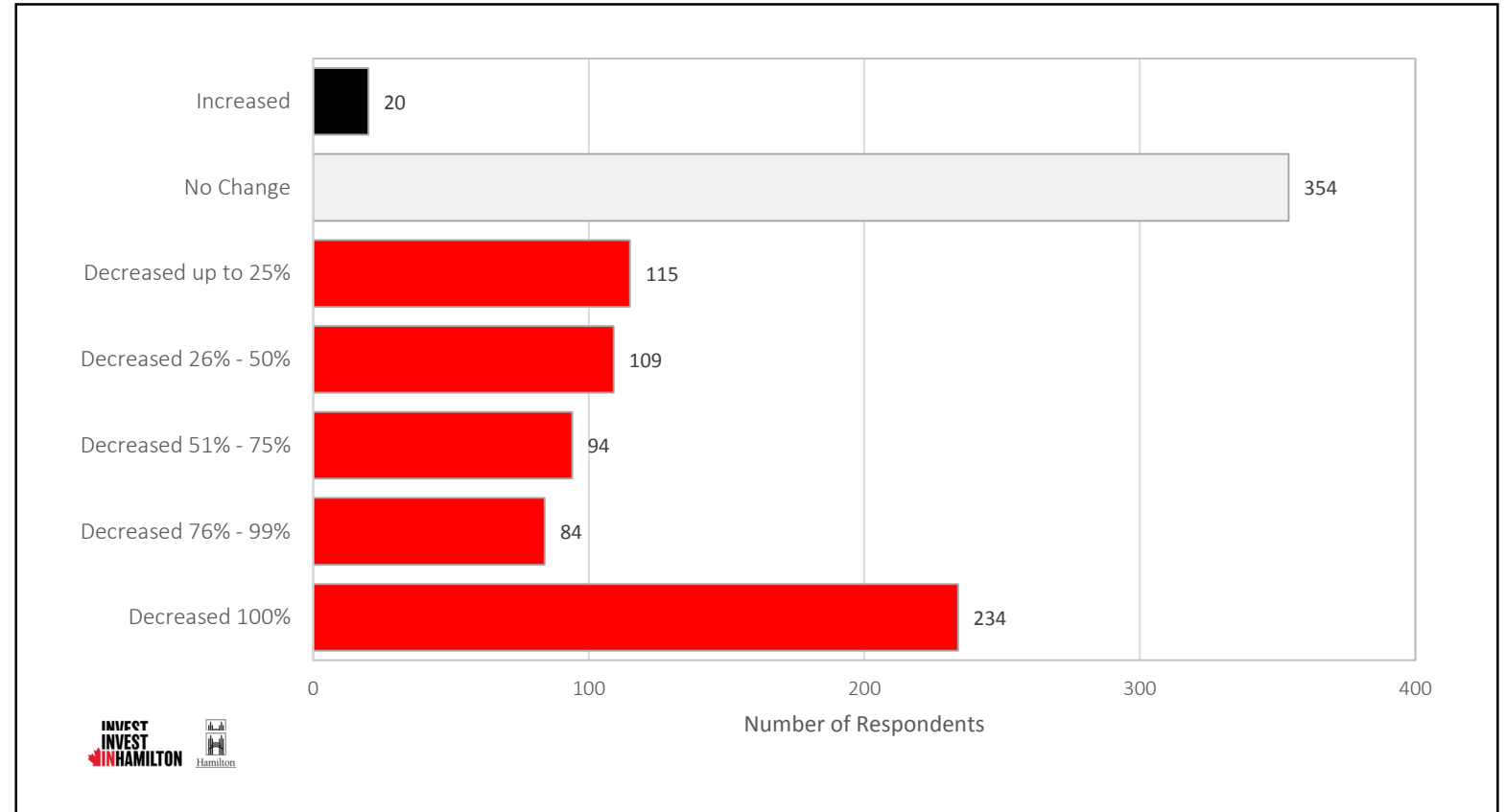
IMPACT ON REVENUE

REPORTED IMPACT ON REVENUE COMPARED TO MARCH 1, 2020 BY INDUSTRY CATEGORY

Industry Category	It has decreased more than 50%	It has decreased between 30% - 50%	It has decreased between 15% - 29%	It has decreased less than 15%	No change	It has increased	Total Population Size
Personal Services	85.7%	7.8%	3.9%	1.3%	1.3%	0.0%	77
Tourism	84.0%	12.0%	0.0%	0.0%	4.0%	0.0%	25
Restaurants / Food Services	81.8%	12.1%	3.0%	1.5%	0.0%	1.5%	66
Retail	77.8%	9.3%	6.5%	1.9%	1.9%	2.8%	108
Creative / Cultural Industries	71.6%	16.2%	4.1%	5.4%	1.4%	1.4%	74
Other	70.0%	0.0%	0.0%	10.0%	20.0%	0.0%	10
Life Sciences	60.0%	10.0%	10.0%	5.0%	15.0%	0.0%	20
Professional Services	58.0%	15.4%	13.6%	7.1%	5.9%	0.0%	169
Total	55.2%	17.3%	10.5%	8.0%	6.7%	2.3%	989
ICT / Digital Media	46.7%	31.1%	6.7%	2.2%	8.9%	4.4%	45
Construction / Contracting	40.2%	28.0%	9.8%	12.2%	6.1%	3.7%	82
Transportation / Logistics	34.5%	25.9%	15.5%	8.6%	12.1%	3.4%	58
Advanced Manufacturing	33.0%	22.9%	17.4%	14.7%	10.1%	1.8%	109
Agriculture / Food and Beverage Processing	29.4%	26.5%	8.8%	5.9%	5.9%	23.5%	34
Not For Profit	29.1%	16.4%	16.4%	16.4%	21.8%	0.0%	55
Finance / Insurance / Real Estate	26.3%	15.8%	22.8%	24.6%	8.8%	1.8%	57

REPORTED IMPACT ON EMPLOYMENT (compared to previous month)

IMPACT ON
EMPLOYMENT



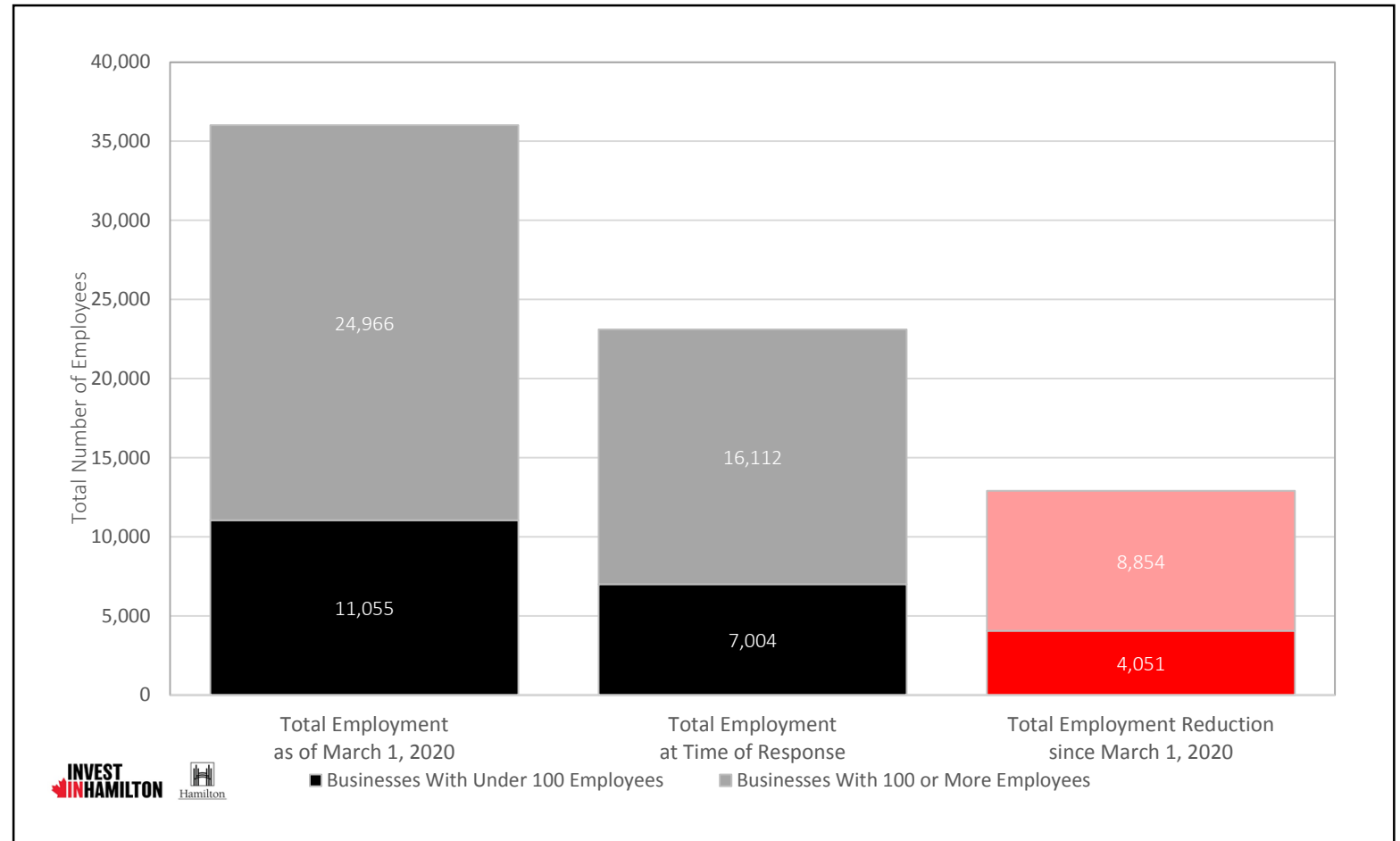
IMPACT ON EMPLOYMENT

REPORTED IMPACT ON EMPLOYMENT COMPARED TO MARCH 1, 2020 BY INDUSTRY CATEGORY

Industry Category	It has decreased 100%	It has decreased 76% - 99%	It has decreased 51% - 75%	It has decreased 26% - 50%	Decreased up to 25%	No Change	It has increased	Total Population Size
Personal Services	57.1%	5.2%	5.2%	3.9%	1.3%	27.3%	0.0%	77
Other	44.4%	0.0%	0.0%	0.0%	0.0%	55.6%	0.0%	9
Retail	40.2%	12.1%	7.5%	10.3%	4.7%	23.4%	1.9%	107
Creative / Cultural Industries	36.0%	10.7%	2.7%	9.3%	2.7%	37.3%	1.3%	75
Restaurants / Food Services	29.7%	28.4%	17.6%	4.1%	2.7%	17.6%	0.0%	74
Professional Services	24.1%	2.9%	5.7%	8.0%	8.0%	49.4%	1.7%	174
Total	23.2%	8.3%	9.3%	10.8%	11.4%	35.0%	2.0%	1010
Finance / Insurance / Real Estate	18.6%	3.4%	8.5%	6.8%	6.8%	55.9%	0.0%	59
Tourism	16.7%	25.0%	12.5%	4.2%	8.3%	33.3%	0.0%	24
ICT / Digital Media	15.2%	2.2%	10.9%	26.1%	4.3%	32.6%	8.7%	46
Life Sciences	13.6%	13.6%	13.6%	9.1%	4.5%	45.5%	0.0%	22
Construction / Contracting	12.2%	3.7%	18.3%	23.2%	17.1%	23.2%	2.4%	82
Agriculture / Food and Beverage Processing	10.8%	8.1%	10.8%	5.4%	13.5%	32.4%	18.9%	37
Not For Profit	7.4%	11.1%	9.3%	9.3%	18.5%	42.6%	1.9%	54
Advanced Manufacturing	6.2%	6.2%	10.6%	12.4%	32.7%	31.9%	0.0%	113
Transportation / Logistics	3.5%	3.5%	8.8%	21.1%	28.1%	35.1%	0.0%	57

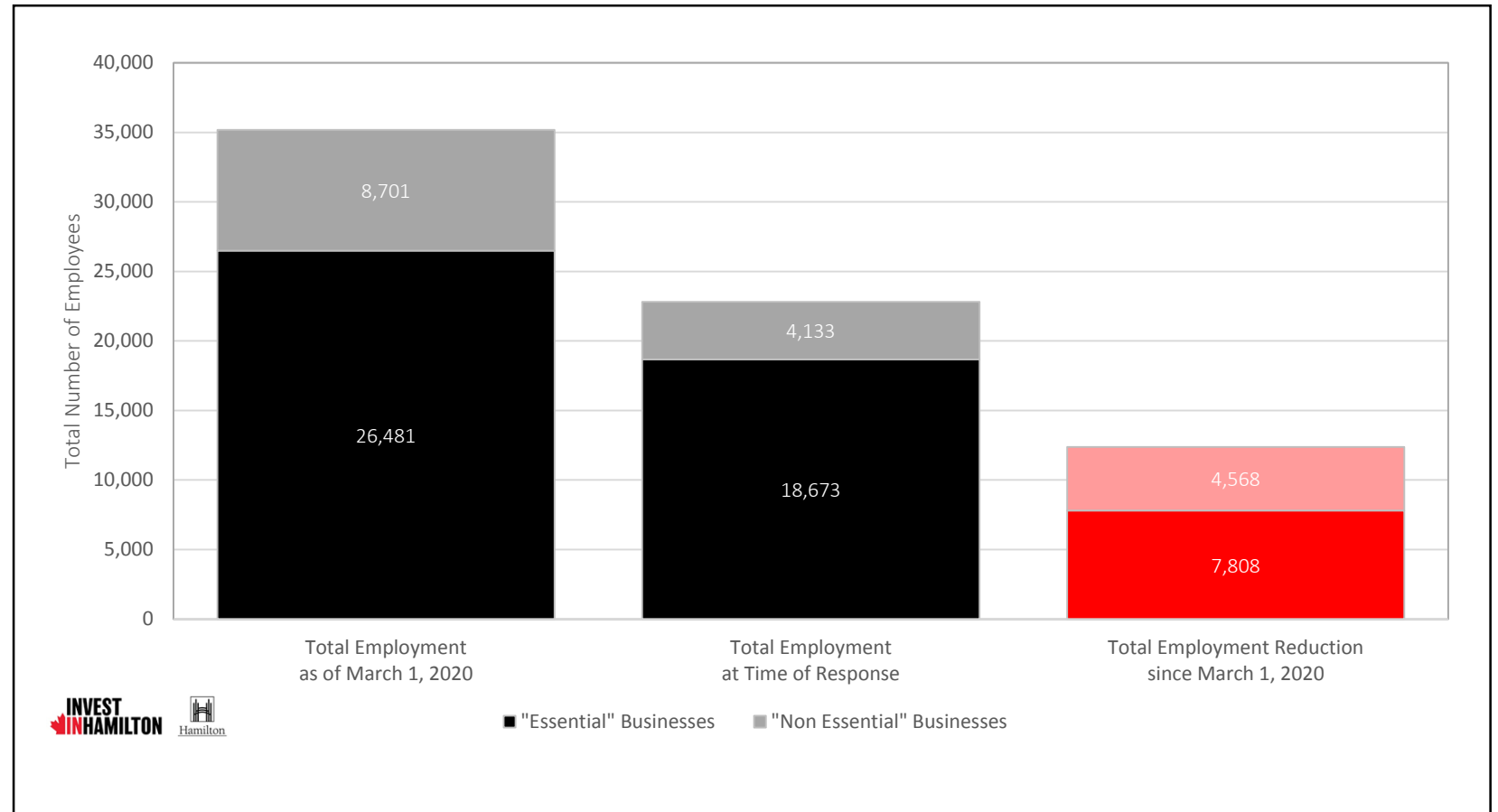
IMPACT ON EMPLOYMENT

IMPACT ON TOTAL EMPLOYMENT LEVELS OF RESPONDENTS BUSINESS SIZE COMPARISON



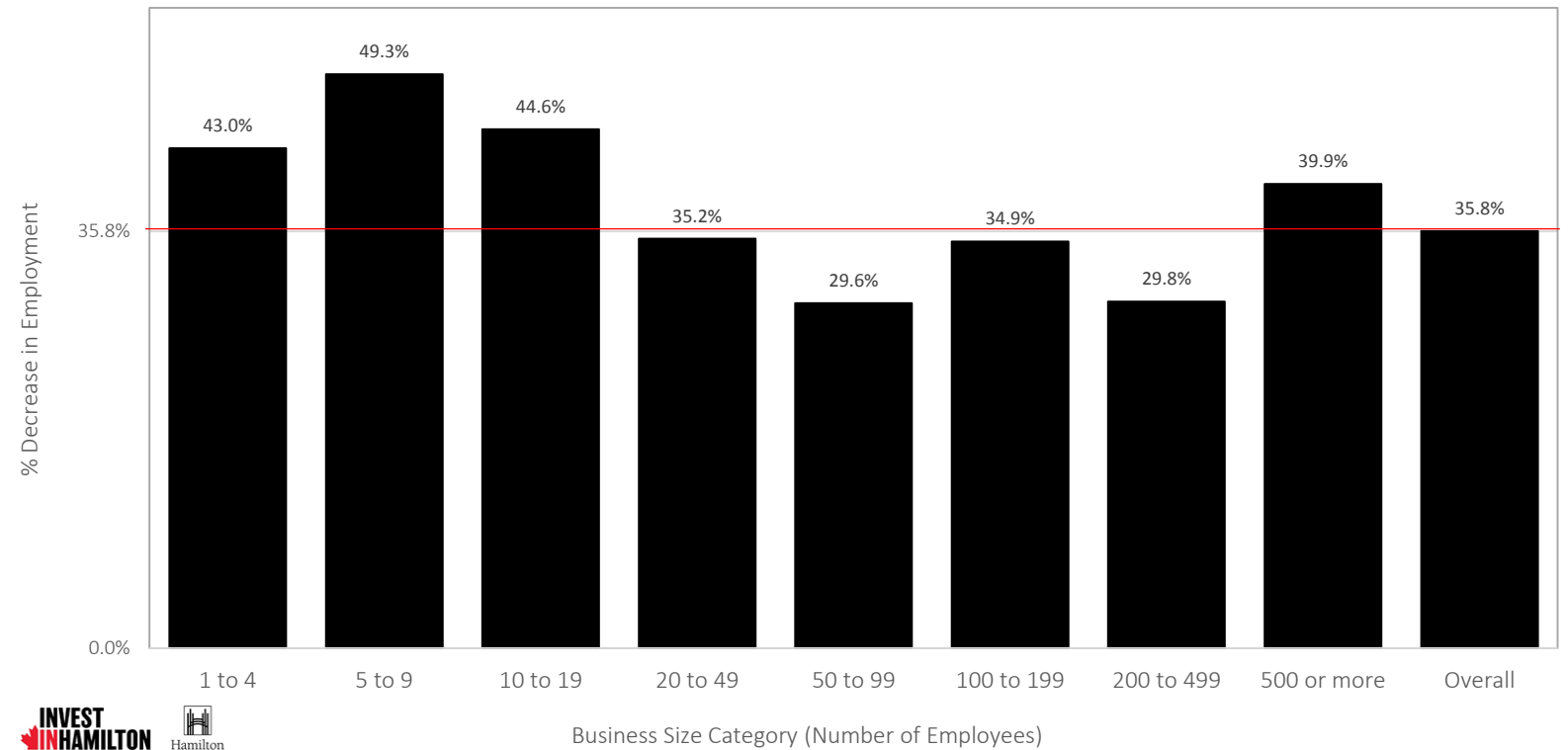
IMPACT ON TOTAL EMPLOYMENT LEVELS OF “ESSENTIAL SERVICE” SIZE COMPARISON

IMPACT ON
EMPLOYMENT



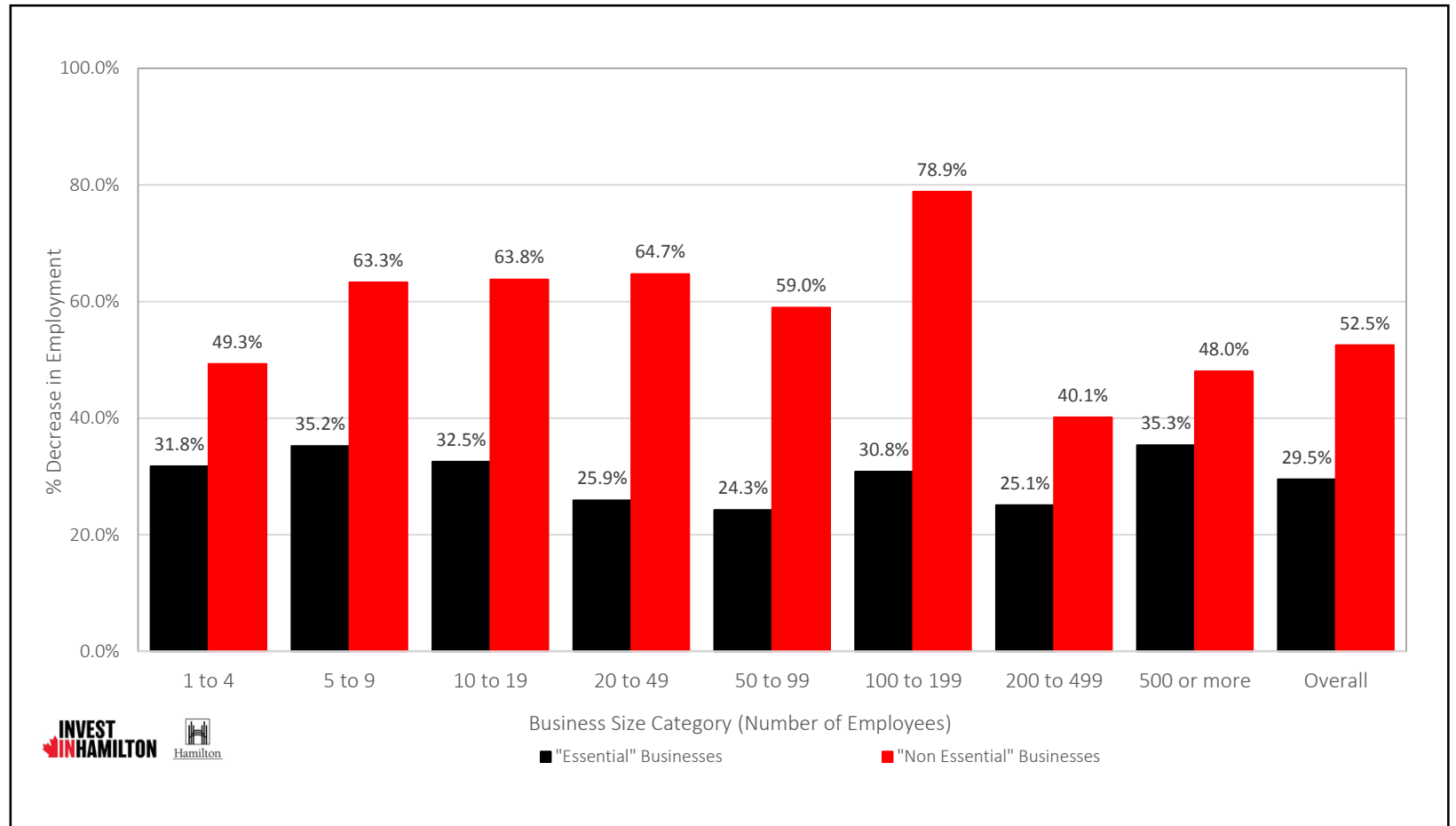
IMPACT ON EMPLOYMENT

REPORTED DECREASE IN EMPLOYMENT LEVELS BY BUSINESS SIZE CATEGORY



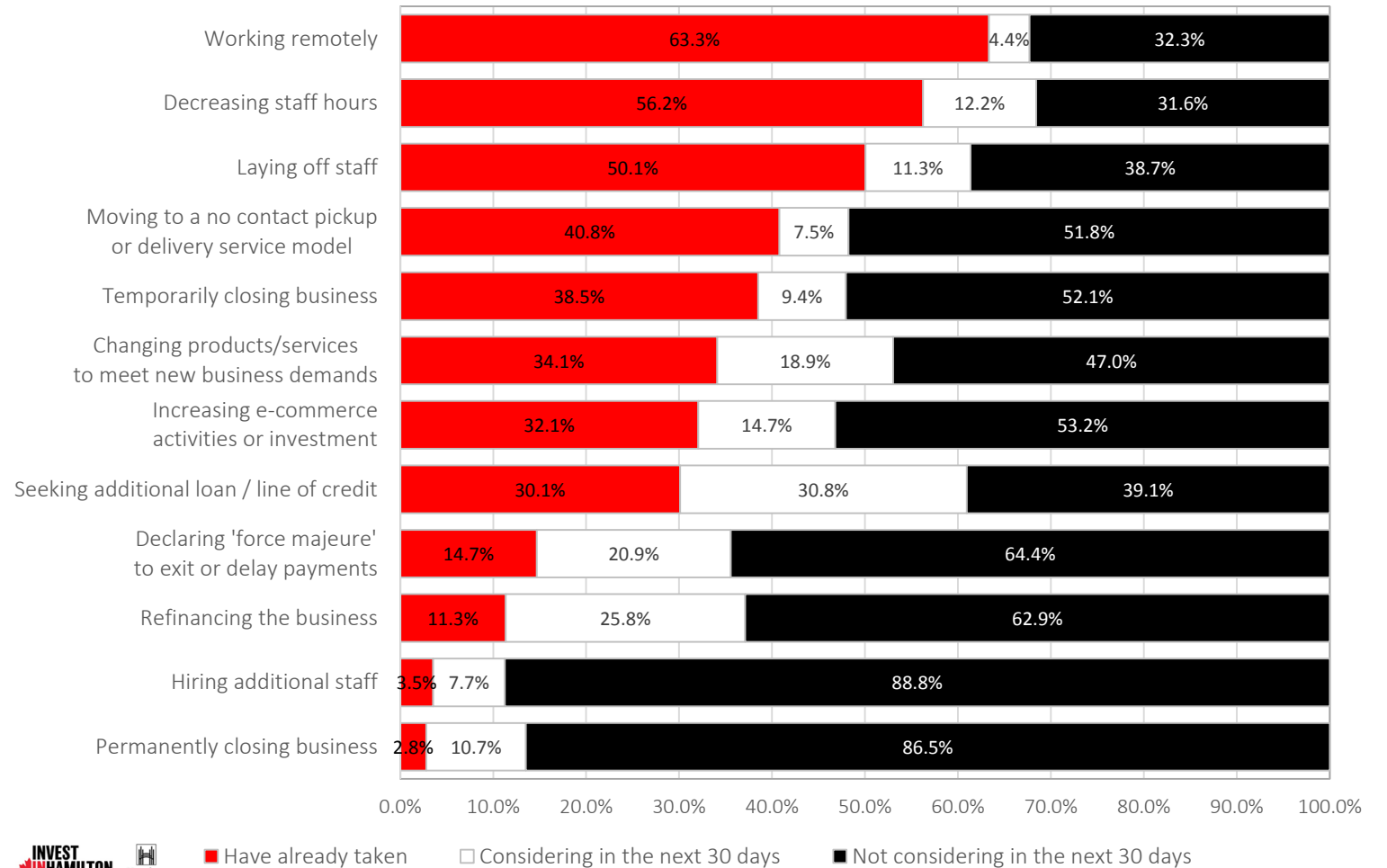
REPORTED DECREASES IN EMPLOYMENT LEVELS (by business size category and “essential service” classification)

IMPACT ON
EMPLOYMENT



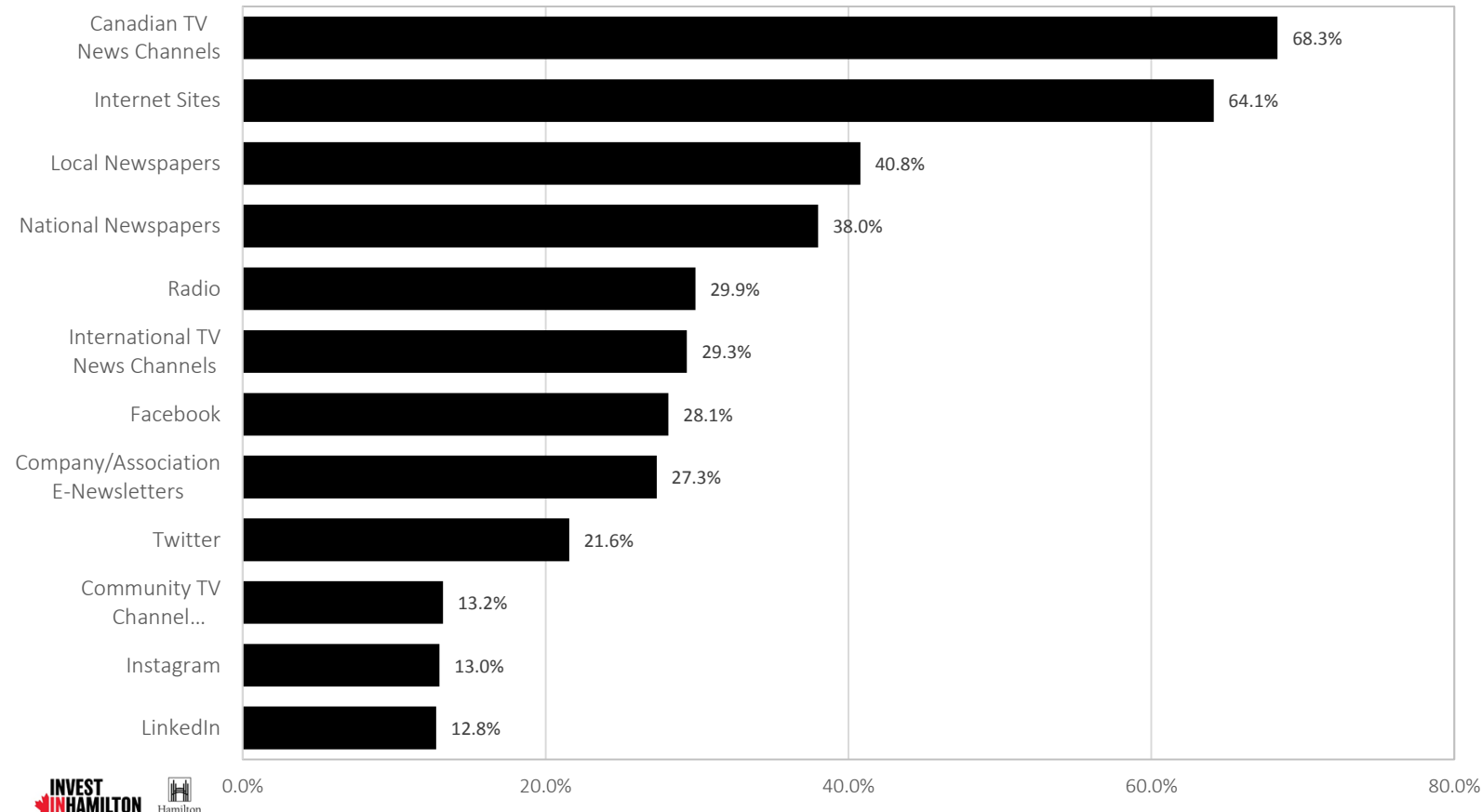
REPORTED MEASURES RESPONDENTS ARE TAKING TO MITIGATE IMPACTS OF THE COVID-19

IMPACT ON BUSINESS BEHAVIOR



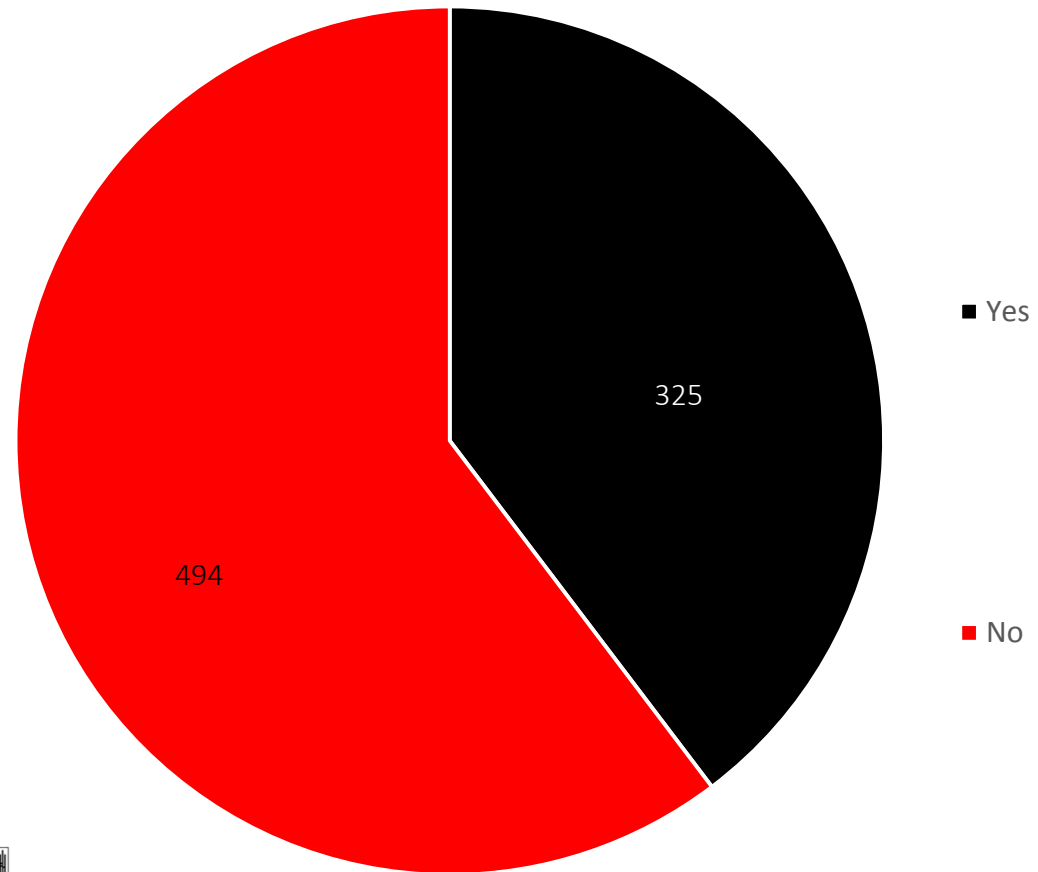
REPORTED CHANNELS RESPONDENTS ARE USING TO GATHER COVID-19 RELATED INFORMATION

LEADING INFORMATION CHANNELS



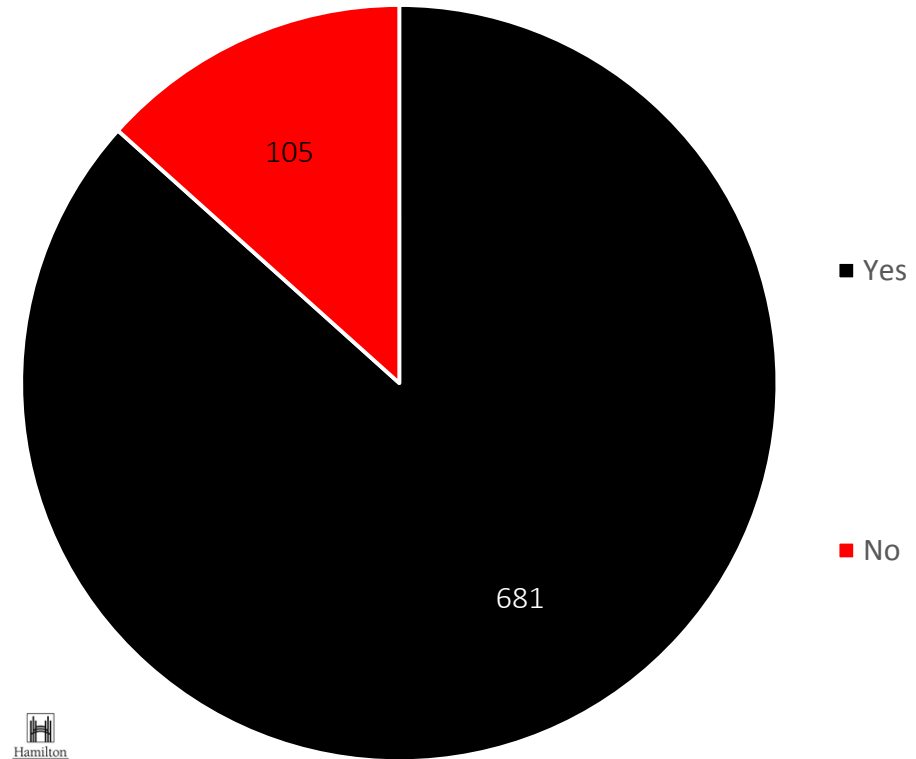
REPORTED AWARENESS OF THE PROPERTY TAX ASSISTANCE PROGRAM (at the time of completion)

AWARENESS
OF TAX
ASSISTANCE



REPORTED WILLINGNESS TO PARTICIPATE IN FUTURE SURVEYS

FUTURE
SURVEY
PARTICIPATIO
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THANK YOU NORM SCHLEEHAHN

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