

COVID-19 Timeline

- November 2019 First Case Wuhan China
- March 14, 2020 – Burlington Parks & Rec Facilities and Agencies closed to public, including 414 Locust and TechPlace.
 - Many City Services moved virtual. TechPlace programming postponed or moved virtual.
 - March 16 – All City Facilities closed to public, March 17 – Ontario declared emergency and closed
 - All bars and restaurants to take out only
 - Schools and Childcare
 - Rec facilities, libraries and theatres
- March 21 – Federal Government Closed Border to non essential travel
- March 21 – Mayor Meed Ward Declared an Emergency in City of Burlington
- March 24 – Province mandated closure all non-essential businesses for 14 days.
- March 30 – Province extended mandated closure all non-essential businesses until April 13.
- April 3 – Province reduced list of essential businesses

COVID-19 Current Situation (April 7, 2020)



Canada Cases: 17,046 Ontario Cases: 4,726

COVID-19 Government Business Support

Local

- Tax Relief for 2020 filings
- Free Transit
- Free Parking

Provincial

- Lowered Electrical Rates
- Implementation of the Municipal Emergency Act
- Deferred Taxes
- Extension of Validation Periods for Commercial Vehicles
- Covid-19 Emergency Relief Fund
- Multiple Employment Supports

Federal

- CERB Program
- Expanded EI eligibility
- Boosted Canada Child Benefits
- Deferred Taxes, GST/HST and Import Duties
- CEBA Program
- Canada Wage Subsidy
- New Loan Guarantee (EDC)
- New Co-Lending Program (BDC)
- Easing of the Canada Account
- Cutting of Interest Rates

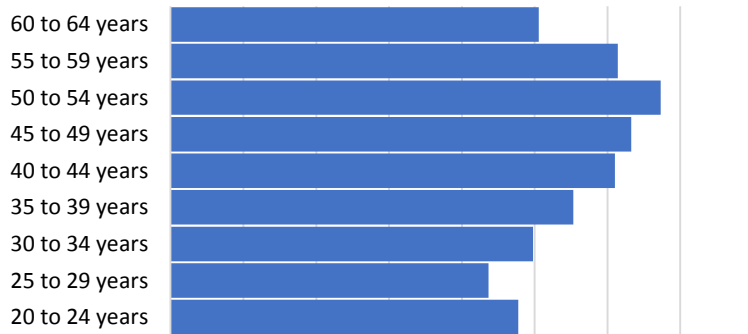
Gaps in Support to date

- Constraints on Municipal Support
- Lack of Health & Safety Guidance for business
- Uncertainty on essential business
- Unclear on direct contacts for supports at federal and provincial level and program rollout
- Direct guidance on how manufactures can retool

COVID-19 Labour Impact

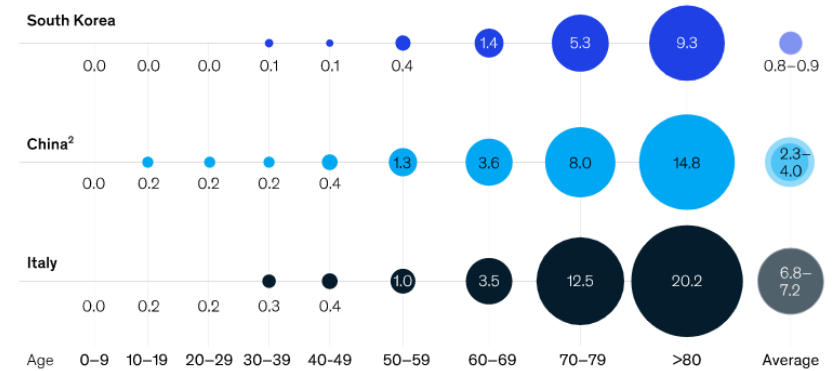
Burlington's Labour Demographics

Burlington's Labour Force Age



Source: Statistics Canada, Census Profile 2016

Case-fatality rate by age segment,¹ % mortality



¹As of data from Feb 11, 2020, in China and as of March 16 and 15, 2020, in South Korea and Italy, respectively.
²Data reported from China Feb 11, 2020, reports 2.3%, however latest deaths/cases from WHO indicate this may be higher.
 Source: China CDC; Korea CDC; L'Istituto Superiore di Sanità (ISS) Italy; WHO; McKinsey analysis

Higher Risk Age Segment (ages 50-64)
 → amounts to 35.9% of Burlington's labour force

COVID-19 Labour Impact

Most Impacted Sectors

Burlington Businesses and Jobs		
Agriculture (11)	Businesses	25
	Jobs	329
Retail (44-45)	Businesses	849
	Jobs	13,360
Tourism (5615)	Businesses	19
	Jobs	123
Healthcare (62)	Businesses	557
	Jobs	7,838
Hospitality (72)	Businesses	447
	Jobs	7,412

Source: Halton Employment Survey, 2018

Sectors expected to be most impacted by COVID-19:

- Agriculture
- Retail
- Tourism
- Healthcare
- Hospitality

In Burlington, a total number of **1,897** businesses and **29,062** jobs may be directly affected by the virus

COVID-19 Local Business Impacts to date

- Small Business Closures, Cashflow shortages & Layoffs
- Sales/Contracts paused and cancelled
- Critical Infrastructure supply chain under increased pressure
- Uncertainty on Health & Safety for Essential Business
- Labour force and recruitment concerns
- Uncertainty & delays for investments & Expansions

TEAM Burlington COVID-19 Response

WE ARE IN THIS TOGETHER

Team Burlington is here to support your business during COVID-19



TEAM Burlington COVID-19 Response

- Keeping our business community informed
- Key tools/resources to support
- Leading community partners and connecting organizations to support business,
- Advocating for the interests of business and the provision of relief measures
- Supporting long term economic recovery

Team Burlington COVID-19 Resources



Team Burlington Business Support Forum Series

Business Support for COVID-19

Business Support Phone Lines

Economic Relief for SMEs

Business Toolkits

Government Updates

Mental Health Resources

COVID-19 Virtual Business Support Forum Series

Team Burlington has organized the COVID-19 Virtual Business Support Forum Series, a 3-part video conference series to provide businesses of all sizes with an opportunity to ask questions and hear from subject matter experts, as well as key leaders and decision-makers from all levels of government.

1. Municipal and Regional Business Support Forum – April 2
 - Over 60 business participated
 - Webinar available online
2. Provincial & Federal Business Support Forum – April 6
3. Small Business Support Forum – April 16
4. Tourism Industry Recovery Forum - late April/early May

Team Burlington Business Support Forum Series

Questions asked by the Business Community

- How has the City defined Essential Services and is business support considered essential?
- How is the City of Burlington supporting small business?
- Are there relief measures related to property taxes?
- Will zoning ease off for small businesses needing to promote themselves through: having a sign on a lawn, parking etc.
- What is happening with respect to development application review and circulation during this time?
- What best practices would you recommend for essential businesses to support health and safety of employees?
- Are plastic screens and masks useful in stopping the infections and should we be implementing these in our business?
- Why are so many things preemptively closed for months when we don't yet have a handle on how long the outbreak will last?
- What is the economic impact on the city and the city's and region's budget?
- Is the City and Region considering any other measures to support businesses?
- How can businesses support the hospital and coordinate to meet healthcare needs?

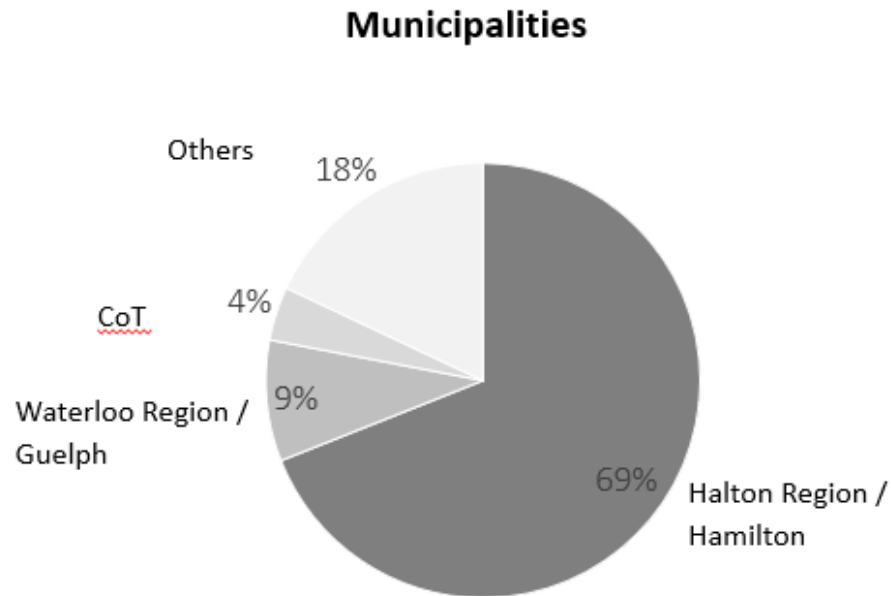
Questions asked by Team Burlington

- What impacts are you experiencing as a result of the COVID-19 pandemic?
- What is your current business status?
- Has your organization had to lay-off staff?
- How have your sales been impacted?
- What are your immediate business concerns?

Toronto Region Board Of Trade: Impact Of Covid-19 Survey Questions And Results

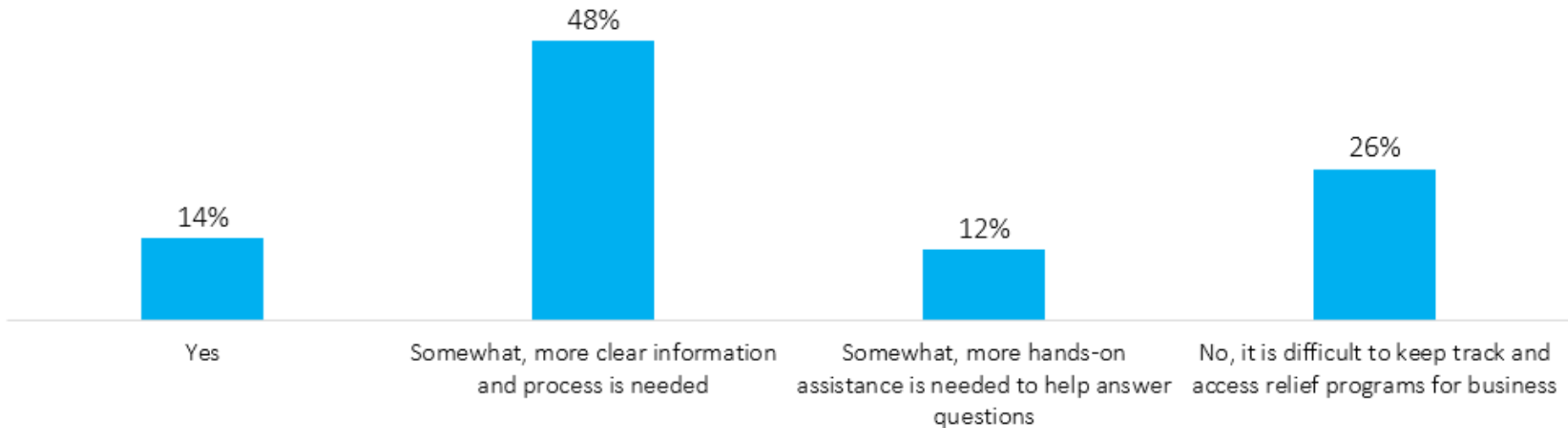
Questionnaire Sample Composition

Total Respondents: 104 companies



Toronto Region Board Of Trade: Impact Of Covid-19 Survey Questions And Results

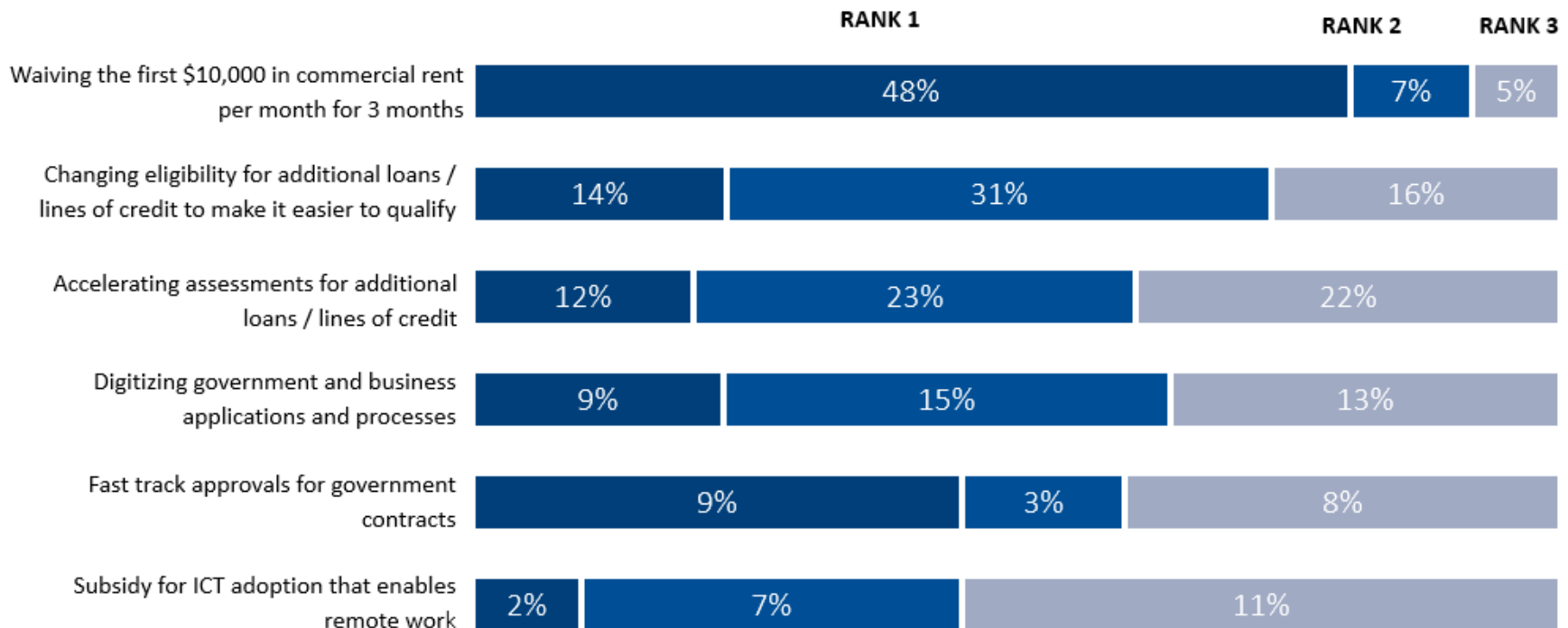
Q1. Does your business have the information it needs to effectively access the business relief measures and programs recently announced by the federal, provincial and municipal governments?



Base: 104 companies

Toronto Region Board Of Trade: Impact Of Covid-19 Survey Questions And Results

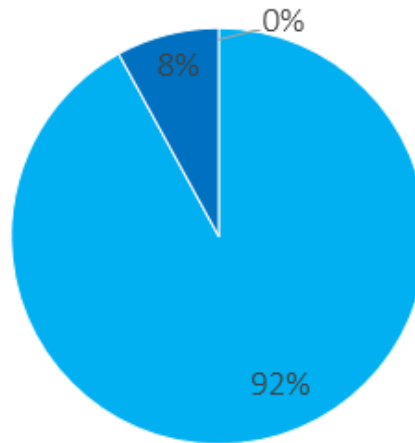
Q2. Governments have recently announced several measures to help businesses stay afloat. What is the most important additional support you still require from the government to help you stay in business. Please rank the top three government measures that you believe will help you stay in business



Base: 104 companies

Toronto Region Board Of Trade: Impact Of Covid-19 Survey Questions And Results

Q3. How do you expect COVID-19 will impact your revenue over the next 30 days?



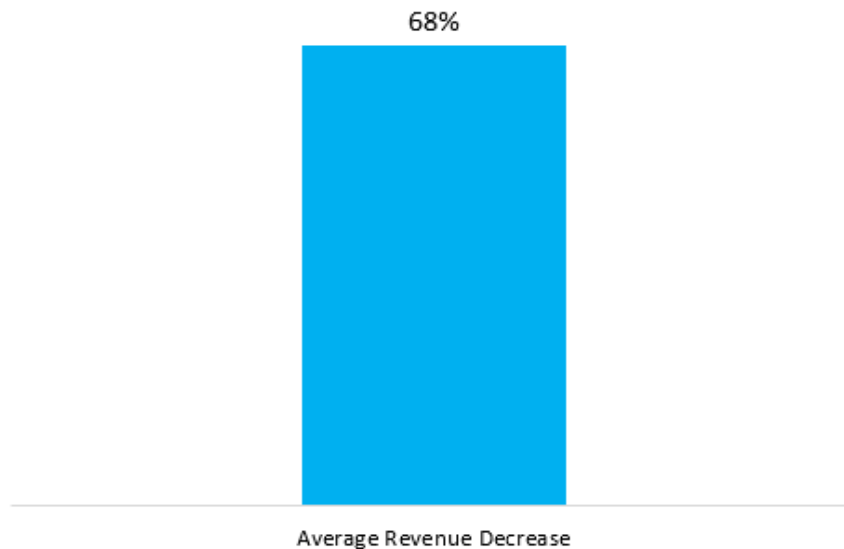
■ Increase in Revenue ■ Decrease in Revenue
■ Minimal to No Impact

Base: 104 companies

Toronto Region Board Of Trade: Impact Of Covid-19 Survey Questions And Results

Q3a. How much do you expect your revenue to decrease over the next 30 days?

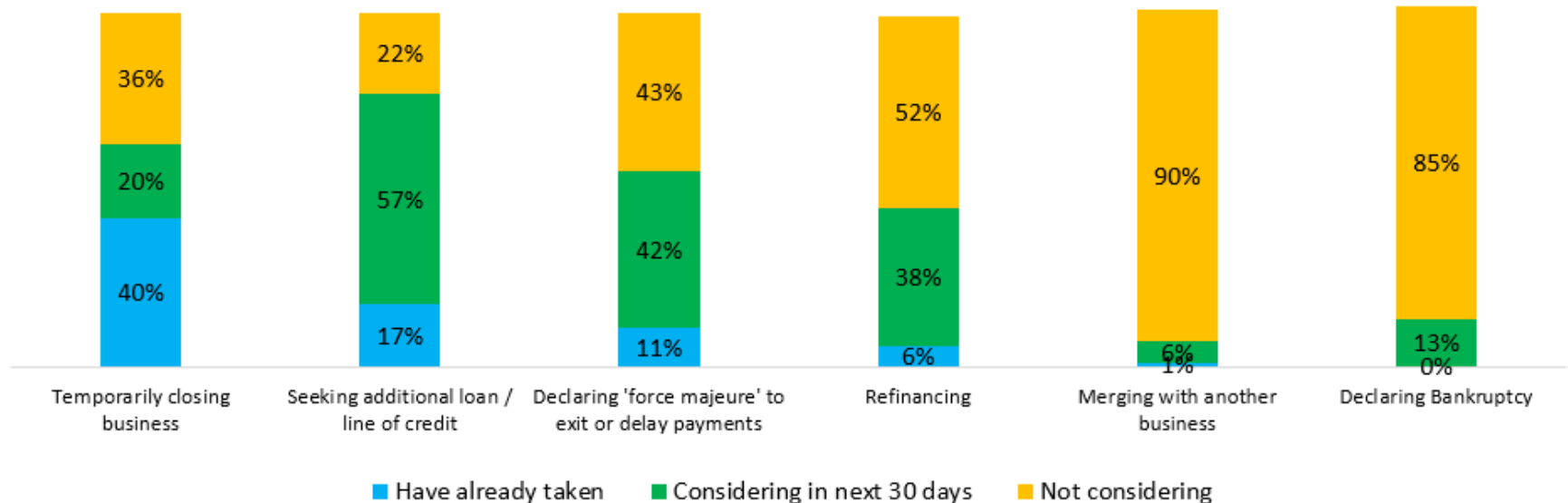
Average Revenue Decrease by (in percentage):



Base: 93 companies

Toronto Region Board Of Trade: Impact Of Covid-19 Survey Questions And Results

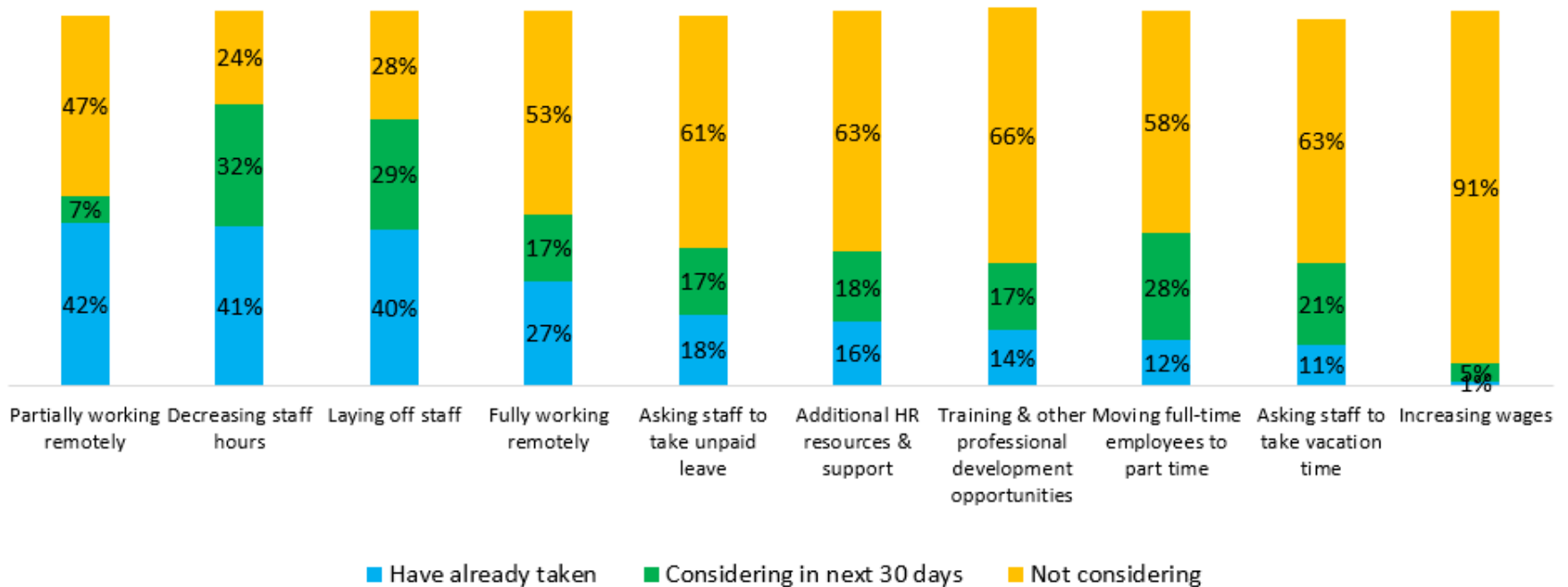
Q4. What measures to improve your liquidity have you taken or are you considering, in reaction to COVID-19?



Base: 104 companies

Toronto Region Board Of Trade: Impact Of Covid-19 Survey Questions And Results

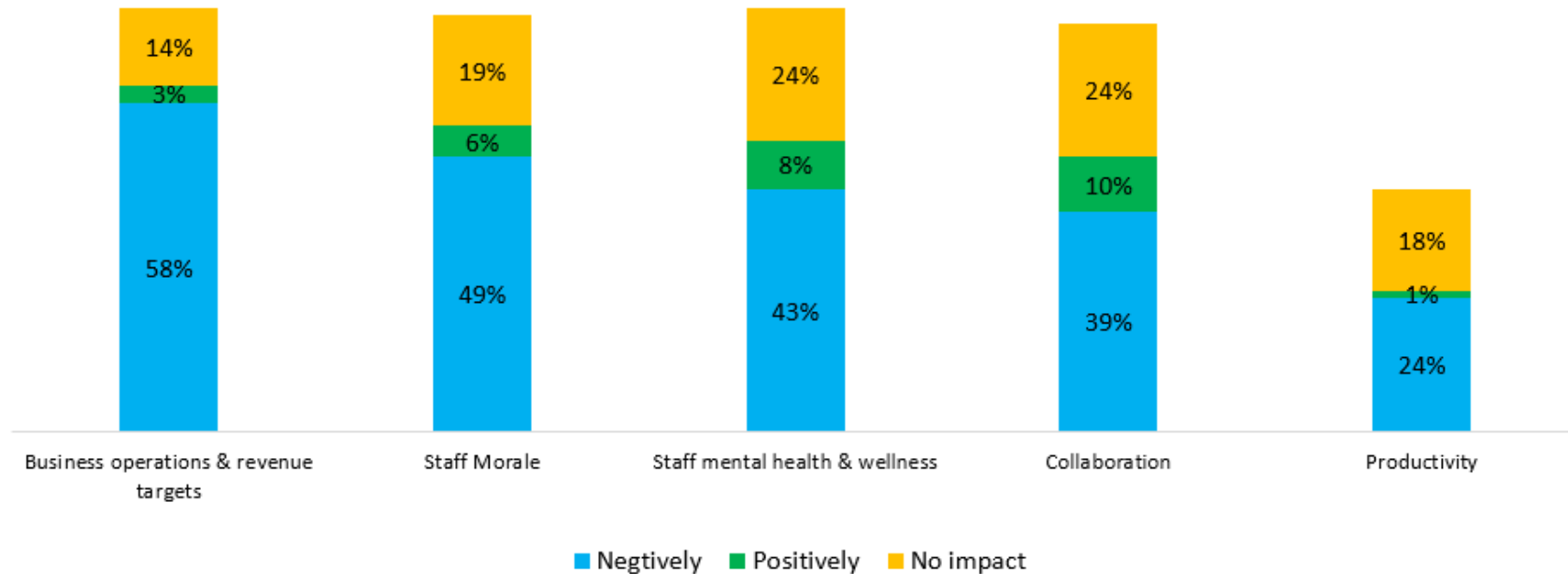
Q5. What measures associated with staffing have you taken or are you considering, in reaction to COVID-19?



Base: 104 companies

Toronto Region Board Of Trade: Impact Of Covid-19 Survey Questions And Results

Q5a. Has working remotely impacted your business positively, negatively or has it made no difference.

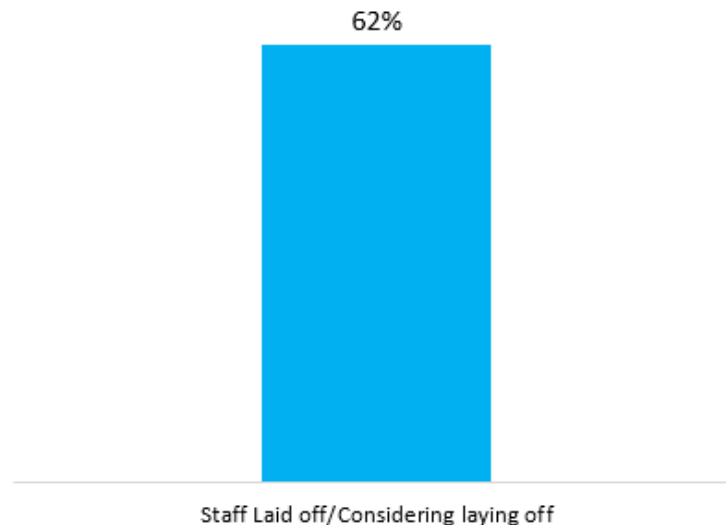


Base: 72 companies

Toronto Region Board Of Trade: Impact Of Covid-19 Survey Questions And Results

Q5b. What percentage of your staff have you laid off or are you considering laying off?

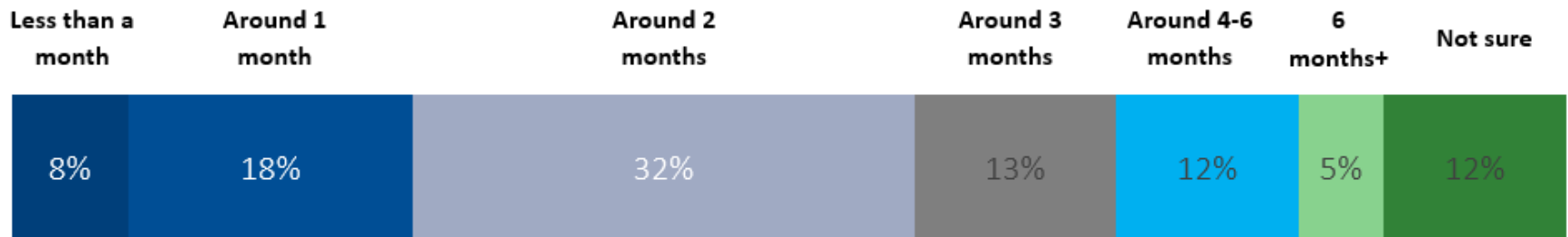
Percentage of Staff laid off / considering laying off



Base: 72 companies

Toronto Region Board Of Trade: Impact Of Covid-19 Survey Questions And Results

Q6. How long do you estimate your business can sustain itself while current social distancing measures are in place?



Base: 93 companies

COVID-19 Long Term Economic Impacts

- Significant impacts to hospitality and retail sector
 - Short term – business closures
 - Long Term – drop in consumer spending capacity
- Higher Unemployment rates
- Housing market shifts
- Economic growth slowing; recession likely
- Onshoring and near shoring become more important
- Technology becomes a greater competitive advantage
- Foreign Direct Investment becomes more difficult