

SURREY PULSE SURVEY

COVID-19 Employer and Workforce Impacts and Needs

November 9, 2020



Prepared by Human Capital Strategies



CONTENTS

	<u>Page</u>
Key Messages	2
Highlights	3
Background	8
Survey Overview	8
Survey Findings	10

KEY MESSAGES

1. **Surrey businesses are resilient** – only 5% have closed; 18% have partially re-opened; 27% have mostly or fully opened; and 23% have experienced no impacts or increased their operations.
2. However, **Surrey businesses are seriously impacted by the pandemic** – 48% have disrupted supply chains; 46% are experiencing staff absences; 44% say caution is keeping customers away; and 41% have reduced demand for their products or services.
3. **E-commerce and digital transformation** – 56% of Surrey businesses have shifted one-quarter to 100% of their business to e-commerce and digital work.
4. **Staff impacts** – One in six Surrey businesses have the majority of their staff laid off or shifted to non-regular/non-full-time work. 41% of Surrey businesses report that staff safety concerns prevent them from returning to or remaining at the workplace.
5. **Government support is mixed** – The federal CEWS and CERB programs are most used by Surrey employers and most Surrey businesses do not qualify the most for LEEFF and CECRA funding.¹
6. **Surrey businesses need different support** – 81% of Surrey businesses want general tax credits/tax cuts; 80% want greater economic stimulus funding; 79% want reduced interest rates; and 78% want better/more payroll tax breaks; and,
7. **Surrey business optimism is mixed** – 37% of Surrey businesses expect business to return to pre-COVID staffing and revenue levels by or before Q1 or Q2 of 2021. 27% percent expect that they will not see pre-COVID levels in staffing and revenue until 2022, later or never (3%).

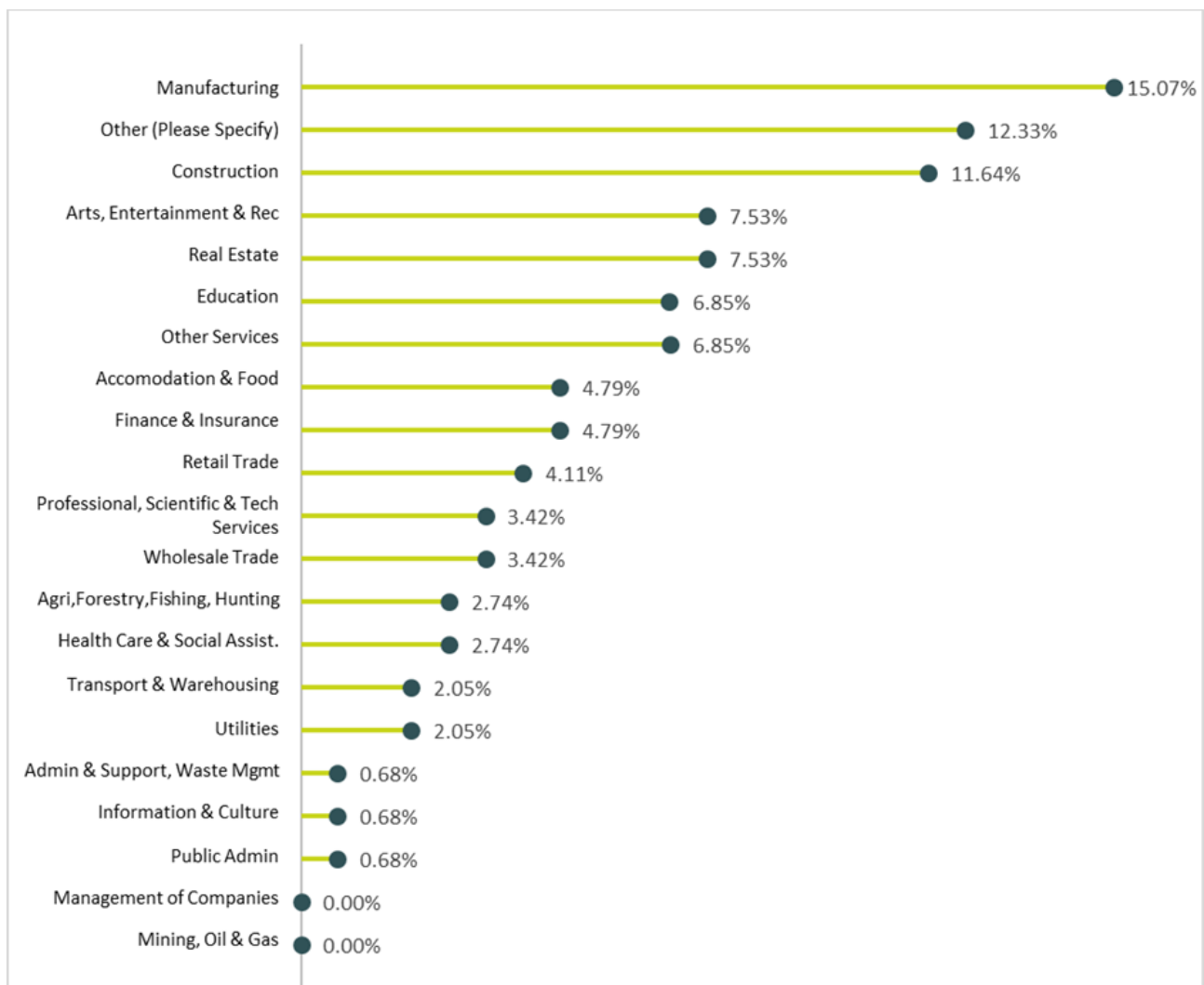
¹ CEWS (Canada Emergency Wage Subsidy Program); CERB (Canada Emergency Response Benefit Program); LEEFF (Large Employer Emergency Financing Facility Program); CECRA (Canada Emergency Commercial Rent Assistance Program).

HIGHLIGHTS

Respondent Sectors and Size

Goods-producing businesses totaled 24.7% of total respondents; and service-producing businesses totaled 75.3% of all respondents. This is similar to the Metro Vancouver and BC proportion. The largest industries in the survey responses were:

- Manufacturing – 15%
- Other Sectors – 12.3%
- Construction – 11.6%
- Arts, Entertainment & Recreation – 7.5%
- Real Estate – 7.5%
- Education – 6.9%
- Other Services – 6.9%



Small and medium-sized enterprises are well represented in the survey with 75% of respondents having less than 50 employees and 91% having less than 500 employees. 57% of respondents have less than 20 employees.

COVID-19 Impacts on Business

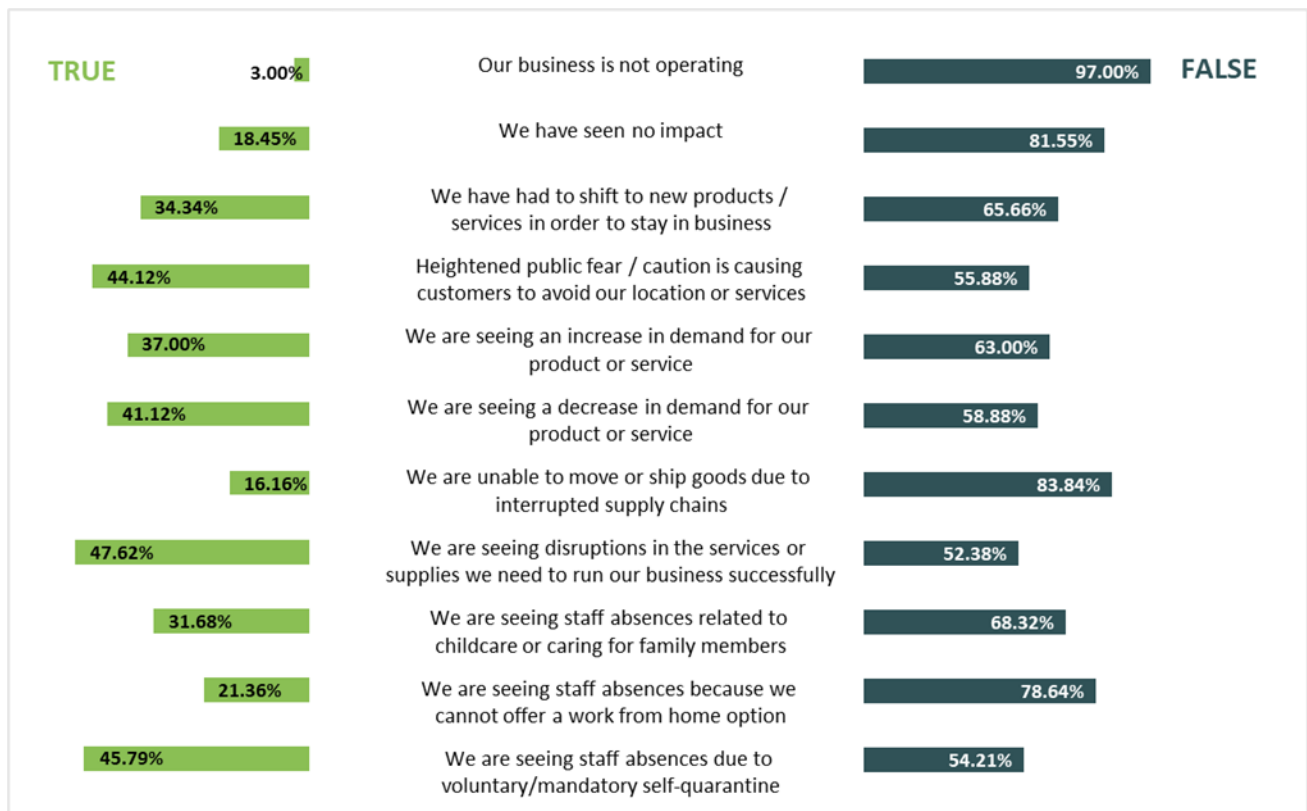
According to responses to this question, it is encouraging that no businesses have closed permanently; however, 5.3% have reported a temporarily closure.

The other respondents are on a continuum in terms of degree of opening.

- 18% have partially re-opened
- 26.5% have mostly or fully re-opened
- 9% have seen their business increased
- 14.3% have experienced no impact.

While about half of the respondents indicated they were mostly or fully open, and/or business increased and/or there has been no impact from the pandemic, in reviewing the comments, many businesses have experienced staffing and/or revenue impacts and have had to pivot to change their business model or move to digital platforms. Comments from those who selected “Other” are listed below so the reader can see them first-hand.

- Many respondents referred to modifying their operations, providing online services or shortening their operating hours to remain open;
- A number of respondents referred to staff layoffs and/or revenue losses;
- Some referred to sector-specific impacts (seniors living sector, performing arts, finance, accommodation, etc.); and,
- A few respondents experienced difficulty in finding and/or hiring employees.



Revenue Changes

While 11% of respondents have experienced an increase in revenue over the same period last year, a majority of them (56%) have experienced a decline in revenue of 20% or more since last year.

Twenty-one percent of respondents have seen a decrease in revenue of 60% to 100%

Shift to E-commerce or Digital Work

In this environment, it is interesting that 39% of respondents indicated that none of their business has shifted to e-commerce or digital work. On the other hand, more than half had shifted their business in this direction: 26% had shifted 75% to 100% of their business; and 28% of respondents had shifted by 25% to 50%.

Staffing Changes

An encouraging 44% of respondents are currently at pre-pandemic staffing levels or above (4% are above pre-pandemic levels). However, a significant almost 20% of responding businesses have experienced 40% to 100% of their being laid off and/or shifting to part-time/temporary/ seasonal status. One in six business have the majority of their staff laid off or shifted to non-regular/non-full-time work.

Key Barriers to Getting Employees Back to Work (and Retaining)

The key barriers to bringing back and/or retaining workers most cited by respondents were (percentages are the proportion of respondents that selected each barrier):

1. Employee safety concerns (41%)
2. Social distancing requirements (40%)
3. Other (29%) (see below)
4. CERB/Government benefits have discouraged employees from returning (22%)
5. Requirement for fewer workers to be operating (21%)
6. Staffing costs (14%)
7. Difficulty for employees to get safely to and from work (12%)

Extent of Certain Challenges

The most significant impacts reflected by the proportion of respondents were:

- Disruptions in services or supplies need to run one's business (48%)
- Staff absences due to voluntary/mandatory self-quarantine (46%)
- Heightened public fear causing customers to avoid their location or services (44%)
- Decreased demand for businesses' products or services (41%)

Almost four-in-ten businesses experienced an increase in demand for their products or services.

Use of Existing Government Relief Programs

- Thirty-five percent of businesses have used or are using the Canada Emergency Wage Subsidy program, and a further 5% plan to use it. The balance either do not need it (31%) or do not qualify (29%).
- More than one-quarter (26%) of Surrey businesses are using or have used Canada Emergency Business Account and a further 9% plan to do so. Two-thirds either do not need it (39%) or do not qualify (26%) for it.
- An equal number of Surrey businesses are either using/did use (6%) or plan to use (6%) the Canada Emergency Commercial Rent Assistance. Half of businesses do not need it and another 38% do not qualify.
- Business Credit Availability Program is being used or have been used by 8% of Surrey businesses, with a further 10% planning to use it. More than half (52%) indicate they do not need it and a further 30% do not qualify for it.
- Only 1 (1%) responding business is using or has used Large Employer Emergency Financing Facility (LEEFF), while an additional 3% are planning to do so. Half of businesses indicate they do not qualify and 46% indicate they do not need LEEFF support.

Overall:

- CEWS and CERB are the most used in Surrey
- BCAP and CERB are the programs most planned to be used
- BCAP, CECRA and LEEFF are the most not needed programs
- The programs where Surrey businesses do not qualify the most are LEEFF and CECRA

Usefulness of Types of Assistance Programs

The most popular types of assistance among Surrey businesses are:

1. General tax credits/cuts (81% believe very or somewhat useful)
2. Greater economic stimulus funding like business improvement grants (80%)
3. Better/more payroll tax breaks (78%)
4. Reduced interest rates (79%)

The options of least interest to Surrey employers are:

1. Business counselling (56% not useful at all)
2. Suspension of loan payments (43%)
3. Delayed municipal property tax payments (42%)
4. Better/more rent or lease assistance (41%)

Comments on Assistance Programs

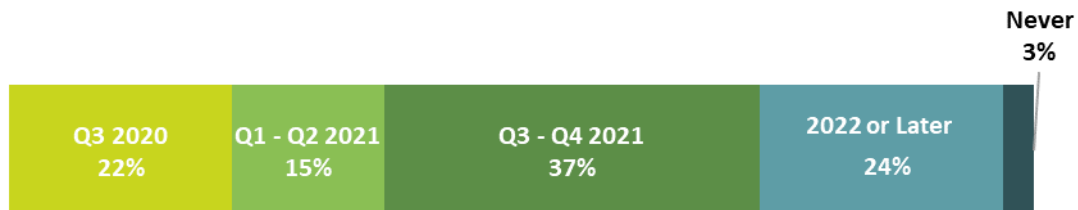
- Some businesses’ comments related to improving or increasing existing programs such as CEBA, CEWS and CECRA, arts/tourism supports and the BC SBRG.
- A few businesses’ comments suggested the need for rapid and on-site testing, including SBOT setting up a testing centre; and educating smaller employers in the Fraser Valley on COVID-19 health and safety practices.
- A few businesses’ comments referred to various types of economic stimulus efforts.

Expectations on Returning to Pre-COVID Staff and Revenue Levels

When asked when they expect business to return to pre-COVID staffing and revenue levels, 37% of Surrey businesses responded that they thought this would happen by or before Q1 or Q2 of 2021.

Another 37% of businesses believe this will not happen until Q3 or Q4 in 2021.

27% percent were even less optimistic and expect that they will not see pre-COVID levels in staffing and revenue until 2022, later or never (3%):



Other Comments on Business Impacts or Needs

Respondents provided a range of interesting and insightful comments:

- A number of respondents’ comments on key impacted sectors such as restaurants, live events, music and arts and non-profits.
- Better direction and more clear guidelines are needed from governments according to some of the business respondents.
- A number of comments related to adapting to the pandemic through digital platforms and greater flexibility to be able to respond what the pandemic brings.

- A few comments were made about supporting smaller businesses and encouraging greater community spirit and neighbourliness.

In Businesses' Own Words (Examples)

- "The PHO continues to play havoc with our plans. Restaurant cannot successfully open and the elimination of 50 person in a meeting room will kill our group business. We are left with small tour and leisure business."
- "There is a great need for businesses to reach out to their neighbours and not work in complete isolation. There is a need for greater community spirit and projects that help everyone like a new Hospital in Surrey-Cloverdale."
- "Clearer guidelines from authorities. There is too much inconsistency in the information fed through the news media. Nothing makes sense, and we do not know who to believe. Our clients are split 50/50 with wanting/needing a return to our normal services, and simply having disappeared."
- "Have had to reimagine fundraising in a virtual environment given that in-person events of more than 50 people (now 25) are not permitted."
- "We need money, plain and simple, and places to perform. Theatres are closed, and we do not have the technology and resources to stream our work. We need a cushion to help us survive until the vaccine arrives, theatres open, we can work together and teach again."
- "As a non-profit we have different needs than other business. Non-profits need qualified volunteers that can help with the many jobs that come with running a non-profit. We need government grants that don't need to be paid back."
- "Small business owners are too stressed to entertain any ideas that can really help them. There is a lack of curiosity and a bunker mentality. Very short-term oriented when they should also be planning for longer-term survival."
- "We are flexible in the way we operate so have been able to deal with most of the issues and the difficulties created by the pandemic."
- "The Art sector is been affected really hard, as musicians we went from performing every weekend or twice a week to 7 performances since February: 1) Organizations, Presenters, Festivals needs to organize online events to hire Artists; 2) Grants to Artists to keep them creating; and, 3) Create awareness, campaigns, in how important Art, Music is in people's lives."
- "We are in the music business. All of our business shut down and we have had to move to a digital platform for everything. Some of that brings in a limited amount of revenue, others bring in no revenue. We've had an 80-90% drop in revenue."
- "Staging in-person events and education is difficult if not impossible and those events account for a significant portion of our revenue."
- "From the business development side, this has been terrible for our innovative SME. We are not able to get in front of or meet important potential clients as we have had numerous trade show/conference events cancelled and there is no end in sight."
- "We need better direction and action from all levels of government."
- "I believe like all business we need to keep our employees employed. I feel there are many small businesses that cannot retain part time employees that are necessary to keep their doors open. I believe this is due to the government's continuation of the CERB or EI. I believe there are many jobs out there but the people that were employed in these positions make more on the government funding so there is no incentive to return to work."

BACKGROUND

The coronavirus pandemic (COVID-19) has precipitated the most widespread and deepest job loss and disruption to Canada and BC's economy in our history. The Surrey economy and labour market have not escaped the huge impacts of the pandemic.

Therefore, with B.C. Ministry of Social Development and Poverty Reduction funding, the Surrey Board of Trade (SBOT) initiated the *Workforce Reset* project (July 27, 2020 – July 23, 2021). Then and now many challenges exist for businesses and workers:

“The key barriers to getting employees back to the office or workplace are social distancing requirements (38%), employees’ reluctance to return to the workplace due to safety concerns at the workplace (35%) and, to a slightly lesser extent, getting to and from work (22%). Over 50% of large businesses report these challenges. The complexity and cost of safety measures are other issues.”¹

The goals of this project are to:

1. Support and build capacity among Surrey employers to plan, prepare for and take action on re-opening of the BC economy to mitigate risks and seize on workforce-related opportunities in the new normal during and after the coronavirus pandemic.
2. Work with workforce groups and employment and training service providers in Surrey to help support, build and coordinate their capacity to serve Surrey employers and workers. Employers will need help and to develop a capacity for being nimble, agile and responding to changes in workforce supply and demand driven by lockdowns, public health guidelines, re-openings and economic recovery. This project responds to this need.

The key project deliverables will be:

- A Playbook for Workforce and Employer Resilience (regularly updated) which includes several tools, templates, checklists, and hyperlinks to specialized information and resources.
- A Rapid-Response Centre to outreach and respond to individual employer needs for planning, preparing and executing recovery and back-to-work strategies.
- Real-time Labour Market Intelligence function through pulse surveying and other intelligence-gathering methods and regular LMI Reports to Surrey employers.

SURVEY OVERVIEW

In order to best serve businesses in this context, SBOT is conducting a series of bi-monthly short and focused pulse surveys to find out business impacts, business needs and how their economic situation evolves over the course of the pandemic. The goal is to offer solutions and connections.

On behalf of SBOT, Human Capital Strategies (HCS) is collecting and analyzing real-time labour market information to identify those employers, sectors and workers most impacted and most in need of

support in Surrey. The results of this survey will provide SBOT with the facts to build, tailor services and advocate for Surrey businesses and their workforce.

The first pulse survey was launched by SBOT on October 5th, 2020 with a deadline of October 16th, 2020. It was extended twice to October 19th, 2020 and October 21st, 2020. While it was closed October 23rd, 2020, the last survey response was received on October 21st, 2020. SBOT sent 4 reminders to prospective respondents.

The survey was distributed in the following ways:

- To 2,000 member businesses with a cover email and survey link; this was repeated as a reminder 4 times;
- To several Surrey stakeholder organizations who represent and/or work with individual businesses;
- To several business associations and industry associations with members in Surrey;
- Through SBOT social media activities; and,
- Through other SBOT channels and events.

The goal of the pulse surveys is to obtain responses to a small sample of representative (i.e. size, sector, Surrey region) businesses in a short period of time with a view to repeat some questions and cover new emerging topics every two months over the next year.

There were 723 individual views of the survey and 166 of these were respondents who started the survey. Of those who started the survey, 94 respondents fully completed the survey and another 56 respondents completed many of the 15 questions in the survey.

Individual question completion by respondent ranged from n=150 for Question 1 to n=91 for Question 15. The number of respondents for each question are listed below under each question.

- 78% of respondents used a computer, iPad or tablet
- 22% used a mobile device
- 7% used a Windows operating system
- 23% used a Mac computer or mobile operating system
- 6% used a mobile Android operating system

The average time for respondents to complete the survey was 9 minutes.

SURVEY FINDINGS

Q1. In which industry is your business in (select one)?

Goods-producing businesses totaled 24.7% of total respondents; and service-producing businesses totaled 75.3% of all respondents. This is similar to the Metro Vancouver and BC proportion. The largest industries in the survey responses were:

- Manufacturing – 22 (15%)
- Construction – 17 (11.6%)
- Other – 18 (12.3%)
- Arts, Entertainment & Recreation – 11 (7.5%)
- Real Estate – 11 (7.5%)
- Education – 10 (6.9%)
- Other Services – 10 (6.9%)

A number of industries may be under-represented in the responses to varying degree. Information & Culture, Mining and Oil & Gas, Public Administration, Retail Trade and Transportation & Warehouse categories should be higher given Surrey's business composition and economy.

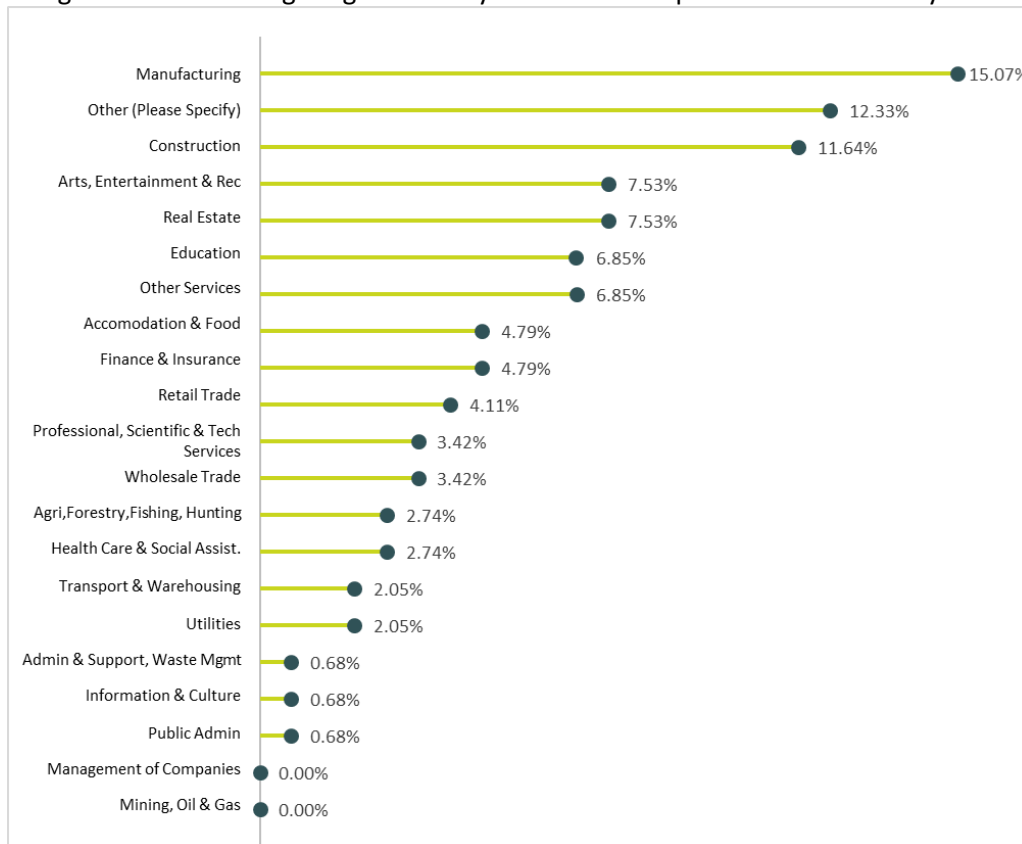


Figure 1: Respondents by Industry

Those respondents who selected “Other” indicated the following:

1. Settlement Services Non-profit (Other Services)
2. Commercial Transport repair and fabrication (Manufacturing)
3. Home Builders Association (Construction)
4. Material handling (Various)
5. Retirement living (Health Care & Social Assistance)
6. Promotional (Various)
7. Software (PSTS)
8. Broadcasting and publication (AER)
9. Professional Services Firm - Insolvency (Other Services)
10. Media (Information and Culture)
11. Technology (PSTS)
12. Not for profit (Other Services)
13. Gaming (AER)
14. Healthcare Innovation (Health Care or PSTS)
15. Charity (Other Services)
16. Non-profit (Other Services)

Q2. In February 2020, my business had (select one):

Small and medium-sized enterprises are well represented in the survey with 75% of respondents having less than 50 employees and 91% having less than 500 employees. 57% of respondents have less than 20 employees.

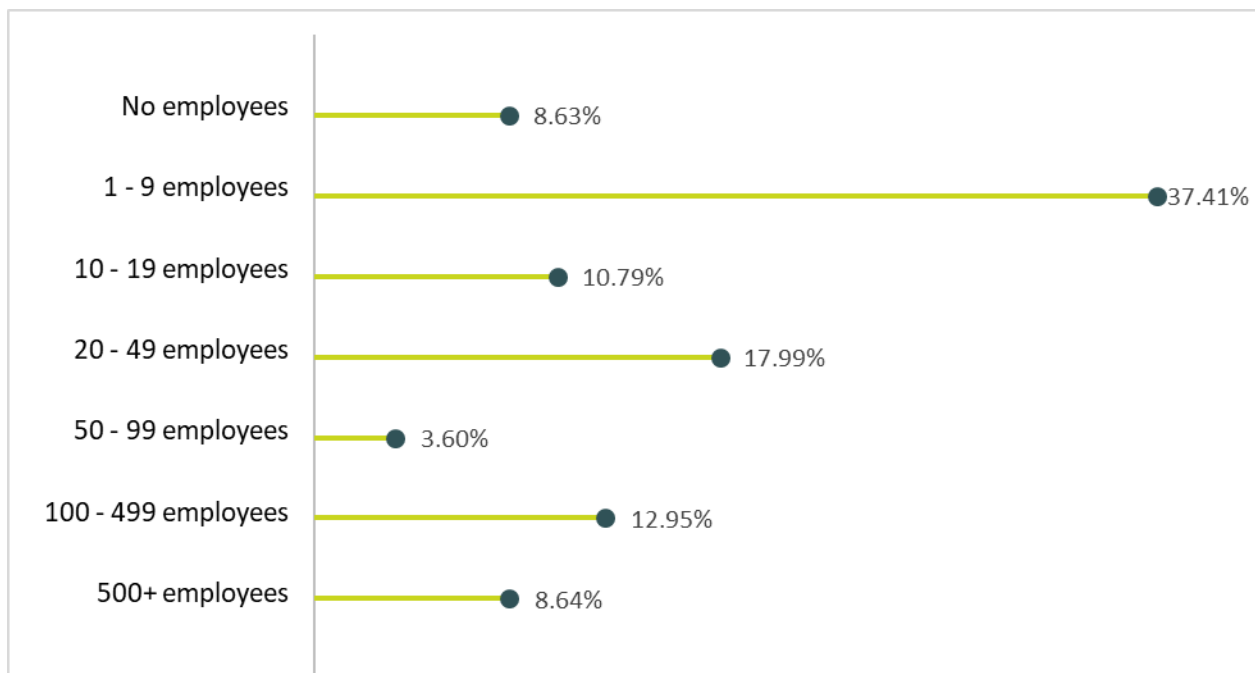


Figure 2: Respondent Business Size by Number of Employees

Q3. How has COVID-19 impacted your business (select one)?

According to responses to this question, it is encouraging that no businesses have closed permanently; however, 5.3% have reported a temporarily closure.

The other respondents are on a continuum in terms of degree of opening. 18% have partially re-opened; 35 or 26.5% have mostly or fully re-opened; 9% have seen their business increased; and 14.3% have experienced no impact.

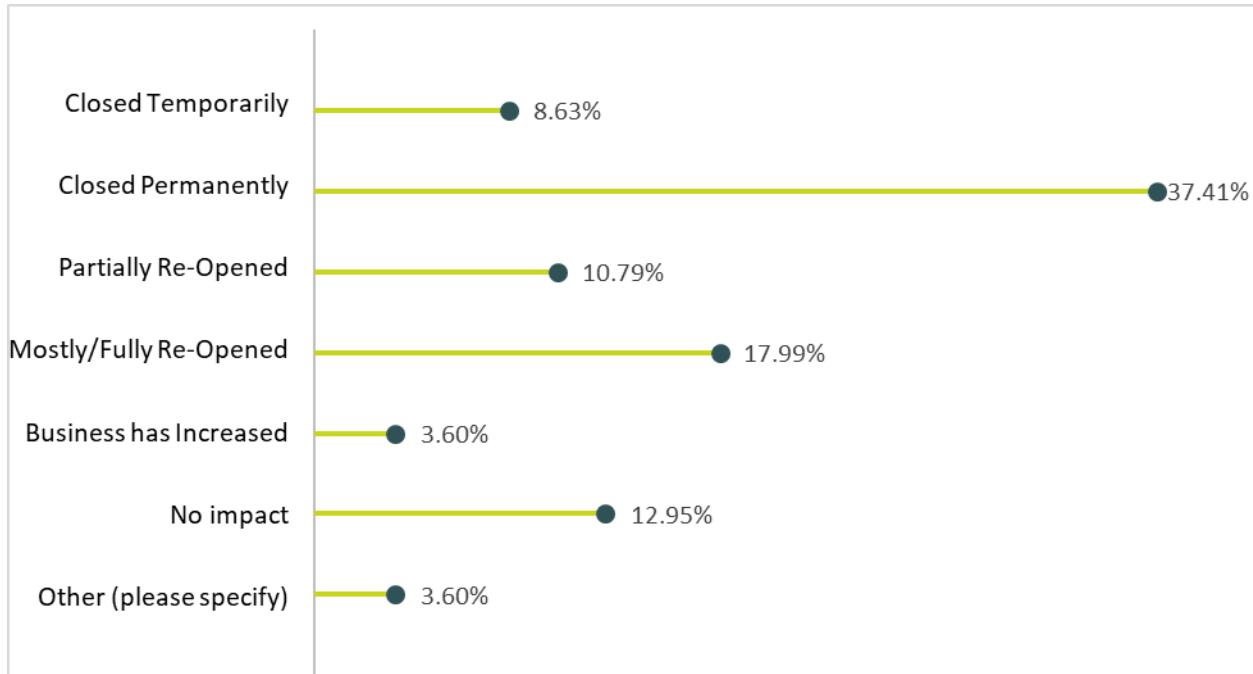


Figure 3: Impact on Business of Respondents

This does not tell the whole story. While about half of the respondents indicated they were mostly or fully open, and/or business increased and/or there has been no impact from the pandemic, in reviewing the comments, many businesses have experienced staffing and/or revenue impacts and have had to pivot to change their business model or move to digital platforms.

Many who have stayed open or re-opened fully have experienced reduced sales or revenue, and/or have reduced their staff complement and/or have moved to partial or full remote work for online sales.

Comments from those who selected “Other” are listed below so the reader can see them first-hand.

- Many respondents referred to modifying their operations, providing online services or shortening their operating hours to remain open;
- A number of respondents referred to staff layoffs and/or revenue losses;
- Some referred to sector-specific impacts (seniors living sector, performing arts, finance, accommodation, etc.); and,

- A few respondents experienced difficulty in finding and/or hiring employees.

Almost one-third of respondents offered “Other” comments:

1. We have kept working through COVID-19 as we are an essential service, servicing both Municipal and Commercial vehicles of all types; we are on the Work Share Program in order to keep our employees employed
2. We had to lay off most employees except for critical employees (X2)
3. Open the entire time but have lost revenue
4. Went from being extremely slow to very busy.
5. Being in retirement living a lot changed ministry and provincial strict guidelines we had to follow to keep residents safe. Very busy keeping COVID-19 out of the building by following all protocols necessary.
6. Layoff of all staff
7. Only 7 performances since February
8. We have modified operations and have remained open
9. We have partially re-opened and our families that we serve are asking for more help which puts a demand on our already strained finances
10. Open with less revenue
11. Online services; partial return to in-person
12. We have remained opened (never closed), but business has decreased
13. We were working, keeping WHO COVID-19 prevention guidelines in place
14. We worked remotely for a few months and, have now returned to the office full-time
15. Lost 60% of revenue slowly gaining it back
16. Never fully closed, just shortened operating hours and closed on Sundays.
17. We’ve had to totally change to an online format.
18. Local business has decreased, online business better
19. Travel restrictions and hazards severely impact my business imp
20. Difficulty in getting supplies and human resources
21. As a federal financial institution, we have remained opened to support our customers financially. As such, our business foot traffic has fallen a bit but is now back on the rise once again
22. Difficulty hiring new employees
23. Maintained operations but able to transition to work primarily from home - minimal impact
24. We have remained operational but moved to remote working and learning
25. Business was never closed
26. Essential service - never closed
27. Our business has slowed down and employees have been laid off
28. operated with minimal workers for (3) months
29. We have remained open during COVID-19 but working remotely from home
30. No closure, work hours reduced
31. slowed somewhat but able to keep running
32. Sales have decreased, but we did not close
33. Never closed but business is down and lobbies are 50% capacity

Q4. Relative to the same period last year, we have seen a reduction in revenue of (select one):

While 11% of respondents have experienced an increase in revenue over the same period last year, a majority of them, 56%, have experienced a decline in revenue of 20% or more since last year.

Twenty-one percent (26) of respondents have seen a decrease in revenue of 60% to 100%.

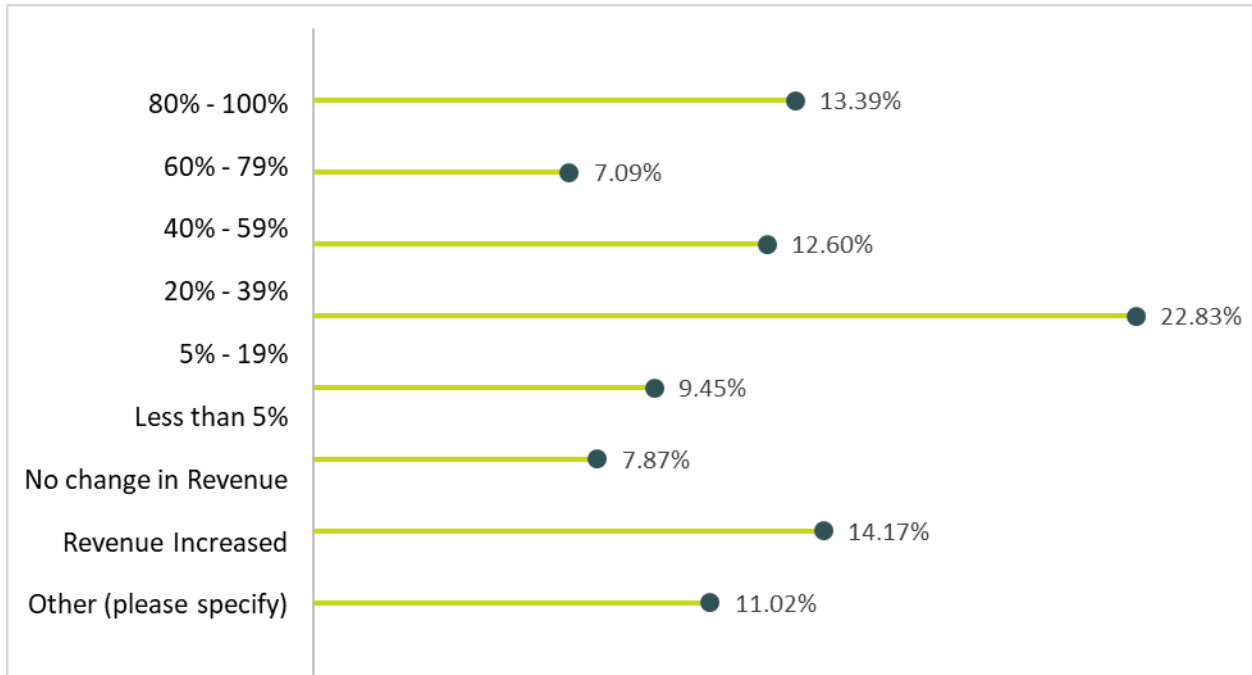


Figure 4: Respondent Reported Decrease in Revenue

Q5. How much of your business has shifted to e-commerce or digital work (select one)?

In this environment, it is interesting that 39% indicated none of their business has shifted to e-commerce or digital work. On the other hand, 26% had shifted 75% to 100% of their business in this direction. A further 28.4% of respondents had shifted by 25% to 50%.

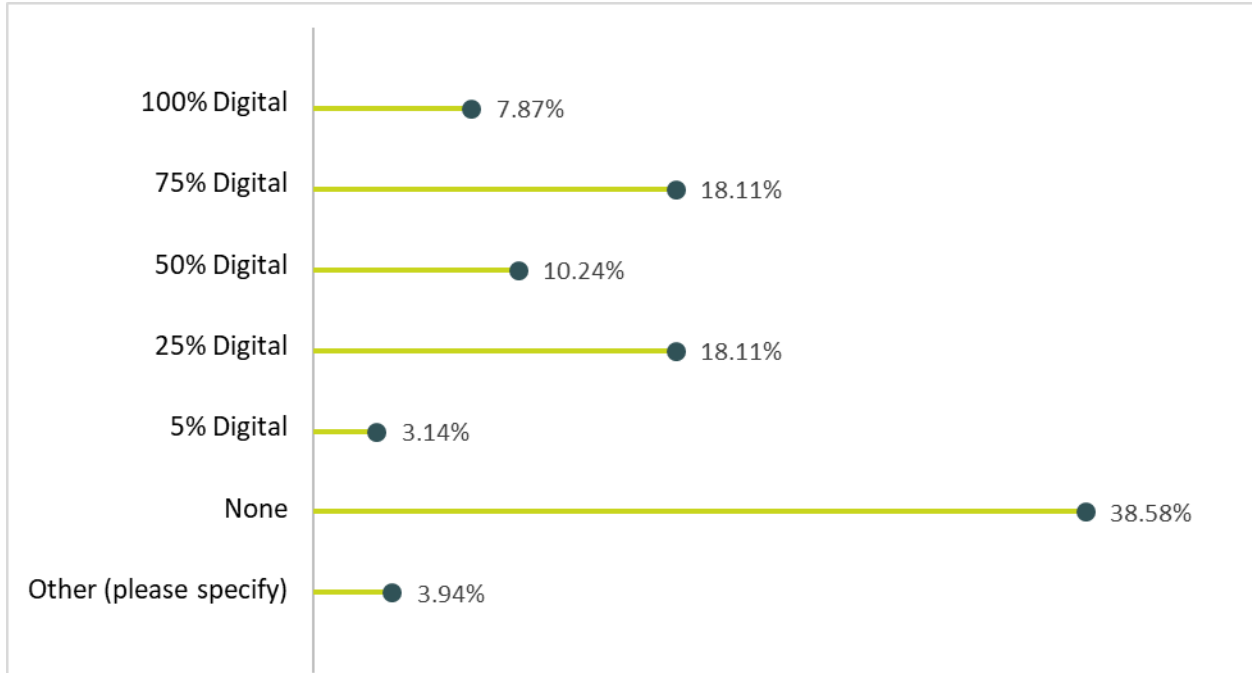


Figure 5: Respondent Reported Shift to E-Commerce or Digital Work

Q6. What percentage of your Full-Time staff has been shifted to Part-Time, Temporary, Seasonal or Laid Off status since February 2020 (select one)?

An encouraging 44% of respondents are currently at pre-pandemic staffing levels or above (4% are above pre-pandemic levels). However, a significant almost 20% of responding businesses have experienced 40% to 100% of their being laid off and/or shifting to part-time/temporary/ seasonal status. One in six business have the majority of their staff laid off or shifted to non-regular/non-full-time work.

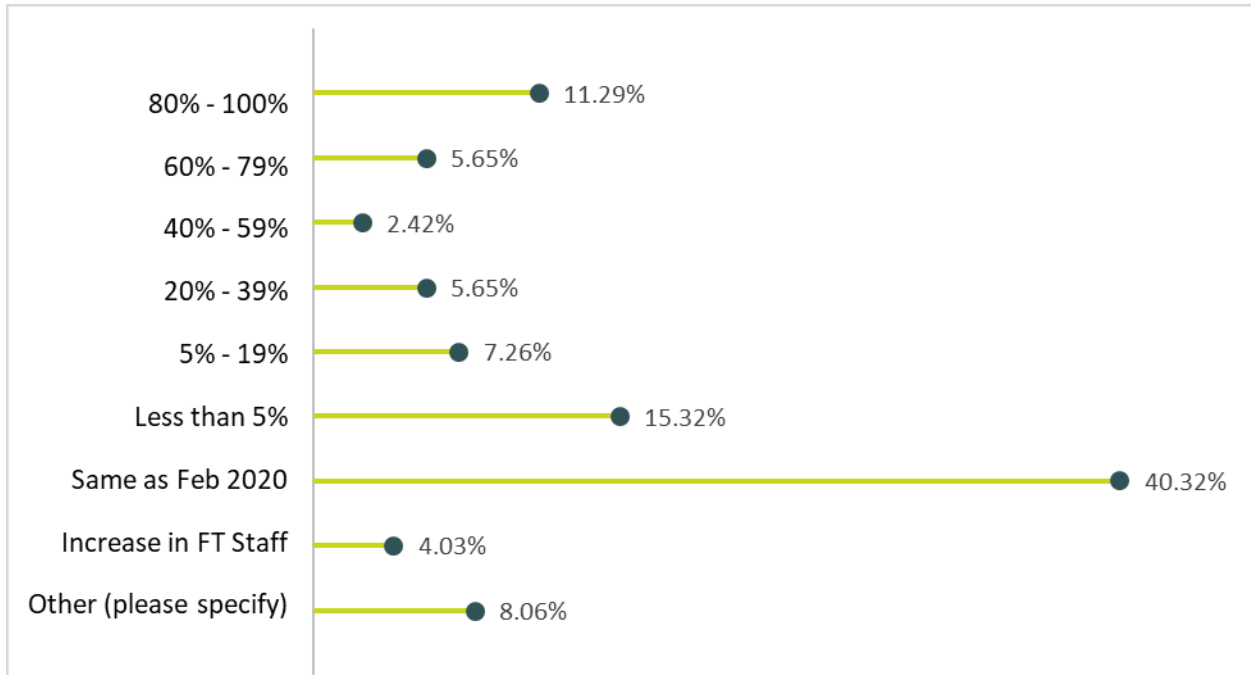


Figure 6: Respondent Reported Decrease in Full-Time Staff

Those who added “Other” comments did not really add any new information except that 2 respondents were self-employed and had no employees.

Q7. The key barriers to getting employees back to the workplace and retaining them are (select all that apply):

The barriers to bringing back and/or retaining workers most cited by respondents were (percentages are the proportion of respondents that selected each barrier):

1. Employee safety concerns (41%)
2. Social distancing requirements (40%)
3. Other (29%) (see below)
4. CERB/Government benefits have discouraged employees from returning (22%)
5. Requirement for fewer workers to be operating (21%)
6. Staffing costs (14%)

7. Difficulty for employees to get safely to and from work (12%)

Answer	Percent of Total Answers	Most Significant Barriers (% of Total Respondents)
We have not reopened but plan to do so in the near future.	1.82%	3.39%
Social distancing requirements	21.36%	39.83%
Employee safety concerns at the workplace	21.82%	40.68%
Difficulty for employees to get safely to and from work	6.36%	11.86%
CERB / Government Benefits have discouraged employees from returning to work	11.82%	22.03%
Staffing costs	7.73%	14.41%
Require fewer employees to operate	11.36%	21.19%
Staff no longer have the required skills needed to operate in the new climate	0.91%	1.69%
Staff are over-skilled / work requires lower skill set as a result of COVID-19	1.36%	2.54%
Other (please specify)	15.45%	28.81%

Figure 7: Respondent View on Barriers to Bringing Employees Back to the Workplace

The “Other” responses were a combination of several barriers such as:

- Challenge of finding workers and costs of training
- Not able to hold live events or large gatherings
- Staff concerns about safety
- Childcare for caregivers
- Restrictions on travel
- Lack of work volume to increase staffing

Q8. Please mark the following statements as True or False as they relate to your business:

Respondents were asked to indicate whether the following statements – possible business challenges from the pandemic – were true or false. In all cases, the proportion of those who answered “false” was higher than those who indicated “true.” The most significant impacts reflected by the proportion of respondents who answered “true” were:

1. Disruptions in services or supplies need to run one’s business (48%)
2. Staff absences due to voluntary/mandatory self-quarantine (46%)
3. Heightened public fear causing customers to avoid their location or services (44%)
4. Decreased demand for businesses’ products or services (41%)

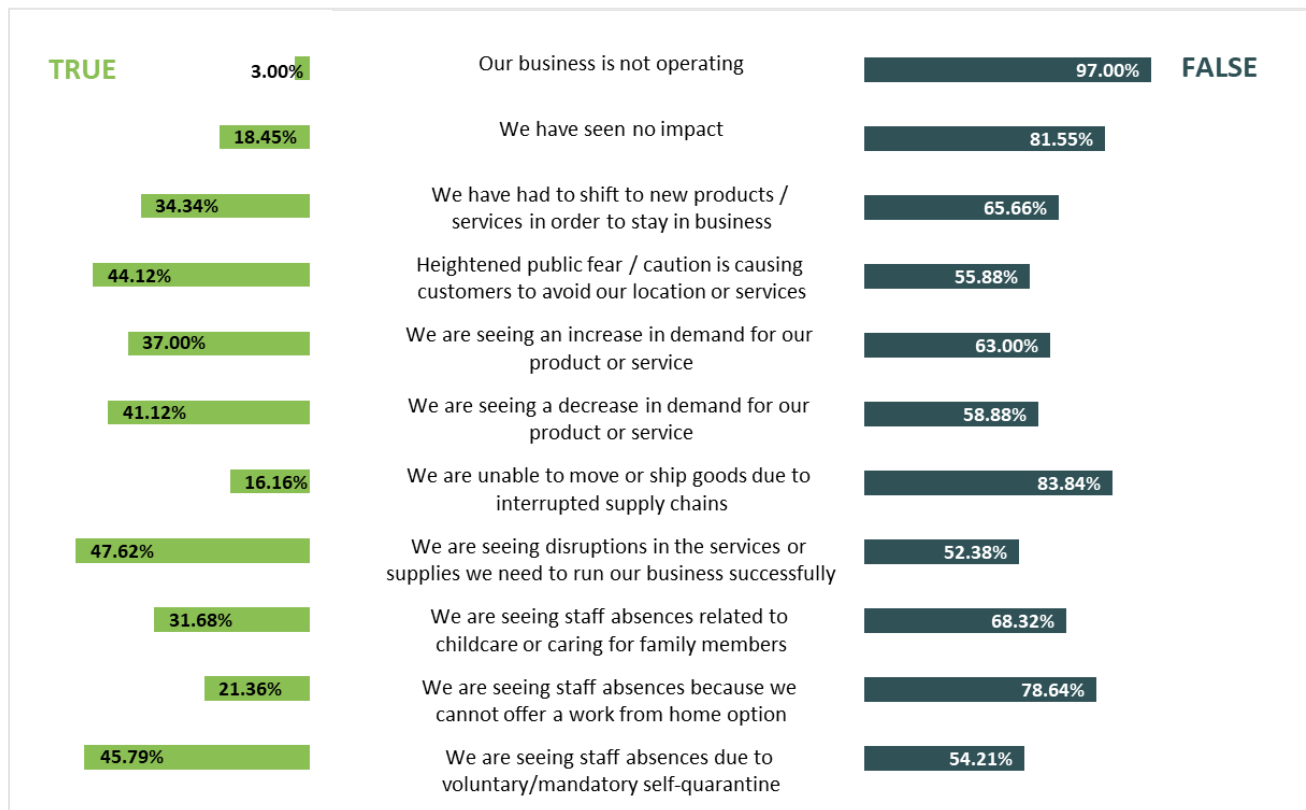


Figure 8: Impacts on Respondent Business

Here are the responses to all statements:

1. When asked, if “We are seeing staff absences due to voluntary/mandatory self-quarantine” is true or false, 46% of businesses indicated this is a reason for staff absences.
2. When asked if “We are seeing staff absences because we cannot offer a work from home option” is true or false, a large majority indicated this was false, and over 21% agreed that this is a barrier to staff being at work.

3. When asked if “We are seeing staff absences related to childcare or caring for family members” is true or false, 32% of businesses indicated this is a reason for staff absences.
4. When asked if “We are seeing disruptions in the services or supplies we need to run our business successfully” is true or false, almost half (48%) of businesses saw this as a disruption.
5. When asked if “We are unable to move or ship goods due to interrupted supply chains” is true or false, only 16% of businesses saw this as a problem.
6. When asked if “We are seeing a decrease in demand for our product or service” is true or false, 41% of businesses were experiencing this problem.
7. At the same time, when asked if “We are seeing an increase in demand for our product or service” is true or false, 37% of businesses are experiencing this.
8. When asked if “Heightened public fear/caution is causing customers to avoid our location or services” is true or false, 44% of businesses indicate this is the case.
9. When asked if “We have had to shift to new products / services in order to stay in business” is true or false, more than one-third (34%) businesses have had to pivot.
10. When asked if “We have seen no impact” is true or false, only 18% of businesses agreed that this has been the case.
11. When asked if “Our business is not operating” is true or false, consistent with responses to a previous question, only 3% of businesses indicate they are not operating.

Q9. Has your business used or intend to use the following existing government relief programs?

When asked, “Has your business used or intend to use the following existing government relief programs”

1. Thirty-five percent of businesses have used or are using the Canada Emergency Wage Subsidy (CEWS) program, and a further 5% plan to use it. The balance either do not need it (31%) or do not qualify (29%).
2. More than one-quarter (26%) of Surrey businesses are using or have used Canada Emergency Business Account (CERB) and a further 9% plan to do so. Two-thirds either do not need it (39%) or do not qualify (26%) for it.
3. An equal number of Surrey businesses are either using/did use (6%) or plan to use (6%) the Canada Emergency Commercial Rent Assistance (CECRA). Half of businesses do not need it and another 38% do not qualify.
4. Business Credit Availability Program (BCAP) is being used or have been used by 8% of Surrey businesses, with a further 10% planning to use it. More than half (52%) indicate they do not need it and a further 30% do not qualify for it.
5. Only 1 (1%) responding business is using or has used Large Employer Emergency Financing Facility (LEEFF), while an additional 3% are planning to do so. Half of businesses indicate they do not qualify and 46% indicate they do not need LEEFF support.

Program	Percent of Total			
	Currently Using/Have Used	Plan to Use	Do Not Need	Do Not Qualify
CEWS	34.95%	4.85%	31.07%	29.13%
CERB	26.00%	9.00%	39.00%	26.00%
CECRA	6.12%	6.12%	50.00%	37.76%
BCAP	8.25%	10.31%	51.55%	29.90%
LEEFF	1.06%	3.19%	45.74%	50.00%

Figure 9: Respondent Use of Government Assistance

Overall:

- CEWS and CERB are the most used in Surrey
- BCAP and CERB are the programs most planned to be used
- BCAP, CECRA and LEEFF are the most not needed programs
- The programs where Surrey businesses do not qualify the most are LEEFF and CECRA

Q10. Please rate how useful each of these types of assistance programs would be to your business.

Respondents were asked to rate types of assistance programs that would be useful to their business. The table below shows businesses' interest in the various options.

The most popular types of assistance among Surrey businesses are:

5. General tax credits/cuts (81% believe very or somewhat useful)
6. Greater economic stimulus funding like business improvement grants (80%)
7. Better/more payroll tax breaks (78%)
8. Reduced interest rates (79%)

The options of least interest to Surrey employers are:

5. Business counselling (56% not useful at all)
6. Suspension of loan payments (43%)
7. Delayed municipal property tax payments (42%)
8. Better/more rent or lease assistance (41%)

The bolded text in the table below shows the strongest responses (most very or somewhat useful or most not useful) to the assistance programs.

Assistance Program Options	Percent of Total		
	Very Useful	Somewhat Useful	Not Useful at All
Reduced interest rates	42.42%	26.26%	31.31%
Business counselling	11.70%	31.91%	56.38%
Delayed municipal property tax payments without penalty	28.57%	29.59%	41.84%
Easier access to zero interest loans	39.80%	29.59%	30.61%
Greater economic stimulus funding (e.g. Business improvement grants)	50.00%	29.59%	20.41%
Suspension of loan payments	24.47%	32.98%	42.55%
Better / More payroll tax breaks	48.96%	28.12%	22.92%
General tax credits / cuts	53.68%	27.37%	18.95%
Access to webinars and resources to help with future business functions	26.60%	43.62%	29.79%
Assistance with applications to access business supports, including government programs	29.79%	38.30%	31.91%
Better / More rent/lease assistance	37.63%	21.51%	40.86%
Assistance with implementation of digital technology	26.60%	37.23%	36.17%

Figure 10: Respondent View of Possible Assistance Programs

Q11. Are there any other programs (existing or not) that would assist your business in dealing with the pandemic?

There were a range of interesting suggestions from Surrey business responses:

- Some related to improving or increasing existing programs such as CEBA, CEWS and CECRA, arts/tourism supports and the BC SBRG
- A few comments suggested the need for rapid and on-site testing, including SBOT setting up a testing centre; and educating smaller employers in the Fraser Valley on COVID-19 health and safety practices
- A few comments referred to various types of economic stimulus efforts

Verbatim responses:

1. Anything to alleviate the financial strain of property taxes is useful
2. Better support from the local government
3. Further extension and increase to the CEBA loan program
4. The province keeps promising small business grants - but nothing has come to fruition. The federal government has stepped up but loans, interest-free or not, can be a death blow to a small business. We need help from the province with grants.
5. I just need people to feel safe.

6. More direct guidance to all businesses directly about the importance of masks and social distancing in the workplace - and tips on what that looks like (including i.e. staggered lunches, spaced seating etc) there is too much complacency with not being careful around the people that are seen at work every day, despite the risk this poses. Businesses in the valley seem to be more complacent maybe because they are smaller and many owner-operated - but they need to understand that although they may not say anything - it makes their employees, vendors and customers very uncomfortable sometimes!
7. Need help with rent payments, especially in the months when I'm only able to pay staff because of the wage subsidy - I really need help with rent
8. The current funding for financial aid for performing arts is distributed through BC Arts Council (Provincial) and Canada Council for the Arts (Federal). Only those organisations or artists who previously were granted funding from these agencies qualify to receive financial assistance now. Given that we were refused funding, we do not qualify for any assistance. Given that our workers are gig workers, independent contractors, we do not qualify for wage subsidy. We have fallen completely through the cracks. There is no assistance for us. We are surviving thanks to previous careful fiscal policies, but only because of that. Theatres are closed so we cannot perform. Our studio is closed so we cannot teach. There needs to be another programme to help organisations such as ourselves.
9. A vaccine or a cure so people feel safe enough to go to a Theatre or concert
10. People with dementia and their caregivers.
11. Not that I can think of top of my head but could use a part time helper in the shop and the CERB is keeping lower wage earners home.
12. SBoT controlled/sponsored member/employee COVID testing center. Possibly a call-in center for members or member employees dealing with anxiety, stress, exhaustion or isolation.
13. Setting up social media.
14. Yes, Language program, Cooking Program, grant writers.
15. Get infrastructure spending back on track
16. Our business is subject to market demand and as such we are impacted when other businesses have problems because of the pandemic.
17. Economic stimulus across the country for Oil and Gas Industry
18. The availability of a fast COVID-19 test that could be administered on-site would be extremely useful.
19. Ease travel restriction
20. Grants to Artists to continue engage and active producing Music, painting, writing etc.
21. The BC Small Business Recovery Grant would assist my business, however, the criteria to have the 75% loss in business in March 2020 is too strict considering that the state of emergency was declared halfway through the month and the repercussions followed for every month after with an average of 80-90% loss of revenue from the year before. Also, the Tourism Top Up should apply to the events industry as the events industry has had as many government restrictions as the tourism industry.
22. Stronger guidance from the government, WorkSafeBC and Dr. Bonnie Henry on face masks use inside given the research regarding aerosol spread in excess of the 6 feet – i.e. all shared office spaces and common areas / all shared manufacturing facility areas. This would allow us to implement this in the workplace without appearing over reactive or expecting anything different than the population in general and allow our us as employers, and our employees to feel much safer in the workplace. It also reduces the potential future lawsuit exposure if it is made clear how much more prudent we can prove ourselves by taking these measures.
23. The CECRA program should reimburse funds directly to the lessees (tenants) 50% of the rent even if the landlord does not participate on the basis the tenant qualifies and the tenant has already paid the rent in the months they qualify. 50% support is better than no support. Going forward the government should allow the tenant to apply instead of the landlord. With the same criteria, the tenant would still have to qualify, but the landlord will also have to prove they need the funds before they can be off the 'hook' of paying the other 25% for sharing the downturn due to this pandemic, whereby the government would allow the landlord to not participate.

24. CEWS has helped us keep our employees employed, with the reduction from 75% down to 35%, we will possibly have to lay some of our employees off if the downturn in the economy continues falling

Q12. When do you expect to see your business return to pre-COVID levels for staffing and revenue (select one)?

When asked when they expect business to return to pre-COVID staffing and revenue levels, 37% of Surrey businesses responded that they thought this would happen by or before Q1 or Q2 of 2021.

Another 37% of businesses believe this will not happen until Q3 or Q4 in 2021.

Twenty-seven percent were even less optimistic and expect that they will not see pre-COVID levels in staffing and revenue until 2022, later or never (3%).

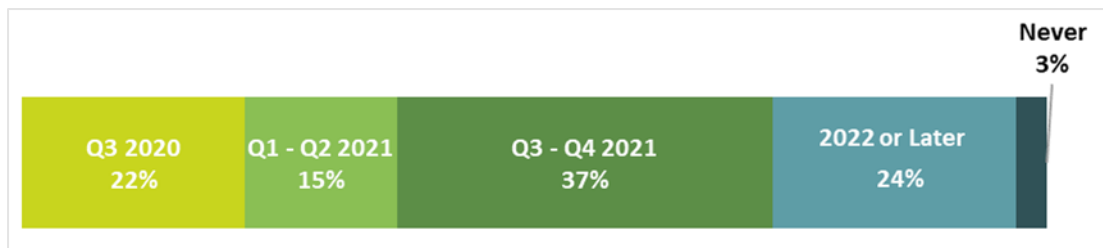


Figure 11: Respondent Expected Return to Pre-Covid Levels of Staffing and Revenue

Q13. Please select which option applies to you.

This question is more relevant for subsequent pulse surveys as it relates to comparing their level of optimism/pessimism with previous surveys.

Answer	Percent
I have answered this survey before and am feeling more optimistic since the last time	6.93%
I have answered this survey before and am feeling more pessimistic since the last time	4.95%
I have answered this survey before and am feeling similar to the last time	17.82%
I have never answered this survey before	70.30%
Total	100%

Q14 Is there any other information you would like to share with us about how your business has been impacted or what your business needs as a result of change related to COVID-19?

Respondents were asked this open-ended question about how the pandemic has impacted their business and what they need to respond to the challenges. About one-third of businesses responded to this question.

Respondents provided a range of interesting and insightful comments:

- A number of respondents' comments on key impacted sectors such as restaurants, live events, music and arts and non-profits.
- Better direction and more clear guidelines are needed from governments according to some of the business respondents.
- A number of comments related to adapting to the pandemic through digital platforms and greater flexibility to be able to respond what the pandemic brings.
- A few comments were made about supporting smaller businesses and encouraging greater community spirit and neighbourliness.

Verbatim responses:

1. The survey is embedded with a bias that my business has been negatively impacted. There should be an opportunity for neutrality in each question to reflect the businesses that have not seen a change, negative or positive. These businesses may just be a small percentage of the overall, but they do indeed exist.
2. The PHO continues to play havoc with our plans. Restaurant cannot successfully open and the elimination of 50 person in a meeting room will kill our group business. We are left with small tour and leisure business.
3. There is a great need for businesses to reach out to their neighbours and not work in complete isolation. There is a need for greater community spirit and projects that help everyone like a new Hospital in Surrey-Cloverdale
4. CERB has reduced the number of job applicants.
5. We were designated an essential service industry. We have never stopped operating at full capacity.
6. Clearer guidelines from authorities. There is too much inconsistency in the information fed through the news media. Nothing makes sense, and we do not know who to believe. Our clients are split 50/50 with wanting/needing a return to our normal services, and simply having disappeared.
7. Help the families who really need the assistance!
8. Have had to reimagine fundraising in a virtual environment given that in-person events of more than 50 people (now 25) are not permitted.
9. Some staff are worried about losing jobs.
10. We need money, plain and simple, and places to perform. Theatres are closed, and we do not have the technology and resources to stream our work. We need a cushion to help us survive until the vaccine arrives, theatres open, we can work together and teach again.
11. With the onset of Covid-19, many businesses had to pivot to digital and reduce or increase their staffing levels. Many businesses are still not at previous hiring or staffing levels
12. Home improvement is hugely popular right now. Especially outdoor spaces which is what we cover and enclose. It's been a stimulus to our business rather than a detriment.
13. Being a diversified business, we are addressing the future industry by industry.

14. Being event orientated, the pandemic has made us change our revenue model
15. As a non-profit we have different needs than other business. Non-profits need qualified volunteers that can help with the many jobs that come with running a non-profit. We need government grants that don't need to be paid back. We need help with online fundraising as this is the only way to bring in extra funds to keep us going. We are already working 24/7 to keep things going and don't have a lot of time to go through all the guidelines to find funding. We have had to move all our programs over to virtual to help our many families which took a lot to do. We don't get any help with the cost of PPE and yet we need to have our office up to the COVID guidelines. I find that non-profits needs are not been met.
16. Safety of our team is paramount
17. Small business owners are too stressed to entertain any ideas that can really help them. There is a lack of curiosity and a bunker mentality. Very short-term oriented when they should also be planning for longer-term survival.
18. We are flexible in the way we operate so have been able to deal with most of the issues and the difficulties created by the pandemic.
19. We are extremely fortunate with having an online selling model. Covid 19 has increased our sales and revenue.
20. My business is dealing with overseas contracting companies.
21. The Art sector is been affected really hard, as musicians we went from performing every weekend or twice a week to 7 performances since February.
 - 1 -Organizations, Presenters, Festivals needs to organize online events to hire Artists.
 - 2.- Grants to Artists to keep them creating
 - 3.- Create awareness, campaigns, in how important Art, Music is in people's lives
22. Get more funding for health care
23. We are in the music business. All of our business shut down and we have had to move to a digital platform for everything. Some of that brings in a limited amount of revenue, others bring in no revenue. We've had an 80-90% drop in revenue.
24. Staging in-person events and education is difficult if not impossible and those events account for a significant portion of our revenue
25. It has been a very difficult and uncertain time
26. From the business development side, this has been terrible for our innovative SME. We are not able to get in front of or meet important potential clients as we have had numerous trade show/conference events cancelled and there is no end in sight. Webinars are at least one avenue but are very limited and usually a one-sided conversation. If one was at a conference, you would be able to go and talk to the speaker afterwards. This has really hurt our company. Also, we are an exporting company so travel outside of Canada and returning and having to quarantine is impacting our company
27. We need better direction and action from all levels of government.
28. I believe like all business we need to keep our employees employed. I feel there are many small businesses that cannot retain part time employees that are necessary to keep their doors open. I believe this is due to the government's continuation of the CERB or EI. I believe there are many jobs out there but the people that were employed in these positions make more on the government funding so there is no incentive to return to work.