



COWICHAN COVID-19 BUSINESS SURVEY #2

Survey Dates: August 5 to 19, 2020

Results Published: September 1, 2020

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This Post Disaster Needs Assessment (PDNA) was undertaken to assess the impact of the COVID-19 event on Cowichan business operations. The research was collectively undertaken by the CVRD and community partners. The results have generated a Cowichan-specific snapshot that can be used to:

- Identify local business needs at a point in time
- Feed into regional economic recovery planning processes
- Allow the CVRD to lobby the Provincial Government on behalf of Cowichan businesses
- Provide data to support the work of local economic development organizations

This is the second in a series of surveys that will be launched to assess the progress of economic recovery within the regional district.

To provide some context to the information, the data gathered in Survey #2 is presented in this report alongside other relevant BC, Vancouver Island, and Cowichan data from additional sources.

Key Findings of Survey #2

Business Overview

- As of December 2019, the Cowichan region was reported to have 3,040 businesses with employees and 14,736 businesses with no employees (Table 1.1)
- Survey #2 received responses from 101 businesses. Business location and annual sales levels are shown in Graphs 1.1 and 1.2
- The PDNA survey was conducted as a self-selected survey (not a random sample) where businesses had the choice of whether to participate or not and therefore no margin of error can be calculated for the resulting data
- Survey #2 received responses from a wider range of sectors than did Survey #1, resulting in a more complete and representative view of the region (Graph 1.3)
- This report makes comparisons between the goods sector and the services sector. Firms surveyed from the goods sector included construction and manufacturing companies. Firms from the services sector included accommodations, arts and recreation, food services, retail, health services, professional services, and more
- Businesses in the goods sector did not report deriving any income from the tourism sector, whereas 32% of service sector businesses reported 25% or more sales income derived from tourism. It was found that the tourism businesses followed similar trends to the services sector overall, and therefore the services sector was used as a proxy for the tourism sector in the analysis to follow (Graphs 1.4 and 1.5)



Impacts on Business

BC and Vancouver Island Tourism

In BC, the percentage of tourism firms reporting business as usual is up to 28% in this latest survey, which is still lower than the Canadian national average of 38% as reported by the Canadian Federation of Independent Business. There has been a 29% reduction in staffing capacity across all firms when compared to normal times. 39.2% of businesses reported revenue decreases of at least 50% compared to July 2019.

On Vancouver Island, 62% of tourism businesses reported reduced operations and 9% were temporarily closed, leaving just 29% reporting business as usual. 38% reported revenue decreases of at least 50% compared to July 2019, and 17% reported that they had lost all revenue. The average change in revenue year over year for island tourism businesses was -53%¹.

Cowichan Specific Impacts

Cowichan businesses are reopening their doors and seeing some business return, but many have reduced staff levels and are experiencing difficulties related to external factors such as supply chain issues or cancellation of important events they depend on. (Graph 1.6)

- 55% of respondents reported a decrease in sales volumes (versus 77% in Survey #1)
- 58% of service sector businesses reported a decrease in sales volume, versus 33% in the goods sector (Graph 1.7)
- 41% have temporarily or indefinitely shut down (versus 59% in Survey #1)
- 1% of the 101 businesses surveyed have closed their doors permanently
- 27% reported decreased demand for their products and services (versus 56% in Survey #1)
- 43% have experienced disruptions to the supply chain they depend on to operate their business (versus 37% in Survey #1). Of those who have experienced supply chain issues, 23% reported investigating alternatives for purchasing product, 2% for sales and distribution, and 11% for both
- 42% have experienced cancellations of important meetings, gatherings or events they depend on (versus 40% in Survey #1)

Revenue is trending back towards typical levels, but there is still a way to go. (Graph 1.8)

- 11% seeing revenue reductions of 75% or more compared with July 2019 (versus 62% in Survey #1 as compared with April 2019)
- 26% of respondents reported no impact or increased revenue compared to July 2019 (versus 10% in Survey #1)

¹ BC Regional Tourism Secretariat COVID-19 Tourism Impact Report, July 27 to August 4, 2020
<https://tourismresiliency.ca/reports/>



Mental Wellbeing

Mental wellbeing has improved significantly since Survey #1. (Graphs 1.9 and 1.10)

- 20% reported feeling Poor or Fair (versus 98% reporting negative consequences of the crisis in Survey #1)
- 80% reported feeling Good, Very Good or Excellent (versus 29% reporting positive feelings in Survey #1)

Employment

BC Wide

As reported in the July 2020 Labour Force Statistics Highlights published by BC Stats, the unemployment rate in BC was 11.1% in July, down 1.9 percentage points from June and up 6.6 percentage points from 12 months ago.

In July, the BC labour force continued to increase (+ 20,000) after substantial declines in March and April, while the number of jobs grew as well (+70,200). Both saw decreases compared to 12 months ago, with employment down by 192,200 and 17,000 fewer individuals in the labour force, mainly due to the implications of the pandemic.

Youth in BC have been especially hard hit, with the unemployment rate for youth aged 15 to 24 years up 14.9 percentage points over July 2019, to sit at 24.1%. Differences were also seen between genders, with the unemployment rate for men down from 9.3% in June to 8.9% in July, and for women the rate was down from 11.4% in June to 8.7% in July².

Cowichan Specific

Cowichan businesses are operating with lower staffing levels than pre-COVID and expect this to continue into 2021.

- 44% have reduced staff hours from pre COVID-19 levels and 39% have laid-off employees. Survey #1 saw 54% reporting reductions in staff levels (Graph 1.6)
- Businesses in the service sector were much more likely to report reduced staff hours (46%) and layoffs (40%) than goods sector businesses (25% for both) (Graph 1.7)
- On average, respondents reported a 10% decrease in full-time employees and a 33% decrease in part-time employees compared with typical staffing levels for July 2019
- 27% of respondents have already returned to pre-COVID employment levels (Graph 1.12)
- Of those who have not already returned to pre-COVID employment levels, 33% expect to return by Spring 2021 or sooner
- 17% expect the decrease in staffing to be permanent, at least for the foreseeable future
- 50% of goods sector businesses have already returned to pre-COVID employment levels, versus 22% for the services sector (Graph 1.13)

² BC Labour Force Statistics Highlights: <https://www2.gov.bc.ca/gov/content/data/statistics/employment-labour/labour-market-statistics>



- 42% reported adjusting their hiring procedures to temporarily reduce staff levels, 15% reported permanently reducing staff levels due to reduced demand (Graph 1.14)

Business Response

Cowichan businesses have responded to the crisis in a variety of ways, both in the short-term and in their long-term business planning.

- 21% have introduced a new product or service, and 10% wish to do so in the future (Graph 1.15)
- 20% of service sector businesses have introduced a new product or service, versus 8% for goods sector businesses (Graph 1.16)
- 19% are planning to reduce the size/scope of their business, and 10% are planning to sell or close in the next year (Graph 1.15)

Long-term Changes to Business Model

The following are some changes to their business models that businesses intend to keep (Graph 1.17):

- 70% will keep increased sanitation procedures (versus 36% in Survey #1)
- 36% expect reduced occupancy to continue (versus 11% in Survey #1)
- 37% will maintain reduced hours/level of service (versus 7% in Survey #1)

Greatest Challenges for Businesses

The greatest challenges for businesses in returning to regular business operations are (Graph 1.18):

- Limits to occupancy capacity (39%), challenges in meeting WorkSafe BC requirements and provincial orders (30%), and consumer confidence (28%)
- Financial challenges were reported by 27% of businesses (versus 35% in Survey #1)

Business Resiliency

- ³Respondents reported implementation of PPE, sanitation and social distancing measures (24%), expansion into the digital economy (22%), and reduced operating hours (10%) as the biggest changes they have made to help ensure the viability of their business (Graph 1.19)
- 63% do not have time for or do not feel they need to engage in business resiliency programs (Graph 1.20)
- 20% are interested in Innovation Island's Digital Economy Restart, Recover, Re-imagine Program (DER3) (Graph 1.20)
- 15% are interested in Tourism Vancouver Island's Vancouver Island Tourism Resiliency Program (Graph 1.20)

³ The themes identified here have been drawn from responses to open ended questions. Every effort has been made to accurately reflect the spirit of the business owners' responses.



Digital Economy

- 38% have introduced or increased online, digital or e-commerce operations (versus 30% in Survey #1 who had implemented online ordering options), and 66% of those businesses identified these changes as permanent. An additional 20% of businesses surveyed want to increase digital engagement in the future (Graph 1.15)
- A total of 58% of businesses have increased or want to increase their engagement in the digital economy. 31% (16) of these are interested in engaging with the DER3 Program run through Innovation Island
- 43% of businesses who have introduced online, digital or e-commerce operations have seen a decrease in sales volumes, versus 62% for businesses who have not introduced online, digital or e-commerce operations (Graph 1.21)
- 37% of companies who have increased their digital operations have also introduced a new product or service, versus 9% for those who have not increased their digital presence (Graph 1.21)
- Businesses expanding into the digital economy were also less likely to have plans to reduce the size/scope of their business (11%), or to have plans to sell or close their business in the next year (3%) versus those who have not expanded into digital (20% and 11%, respectively) (Graph 1.21)
- 36% of respondents from the service sector have introduced or increased online, digital or e-commerce operations, and 20% would like to do so in the future. Comparatively, 25% of goods sector businesses have increased engagement in the digital economy (Graph 1.16)

Government Support

Businesses are making use of available support programs, but many do not have a plan in place for when government supports end.

- 33% report not using any government support programs (Graph 1.22)
- The most popular programs are CEWS (30%), CEBA (28%), and CERB (24%) (Graph 1.22)
- This is on par with BC as a whole, which saw 35% of businesses not using any government support programs (38% island-wide), and the most useful programs as CEWS, CERB and CEBA⁴
- 13% of respondents did not qualify for government support programs (Graph 1.22)
- 43% of respondents do not know what they plan to do once government support ends (Graph 1.23)
- 29% plan to return to business as usual once government support ends (Graph 1.23)
- 11% plan to layoff or terminate employees once government support ends, 7% plan to close their business either temporarily or permanently (Graph 1.23)

⁴ BCMindReader.com COVID Impact Pulse Check #4, summary results for July 7 to 13, 2020, <https://www.bcmindreader.com/hub/posts/banner-1-network-25520864>



Regional Response Suggestions

- ⁵Respondents identified increased access to government support and services, and reducing fear / increasing consumer confidence as some of the most important actions towards recovery to be coordinated on a regional scale (Graph 1.24)

⁵ The themes identified here have been drawn from responses to open ended questions. Every effort has been made to accurately reflect the spirit of the business owners' responses.



Graphs and Tables Summarizing Findings

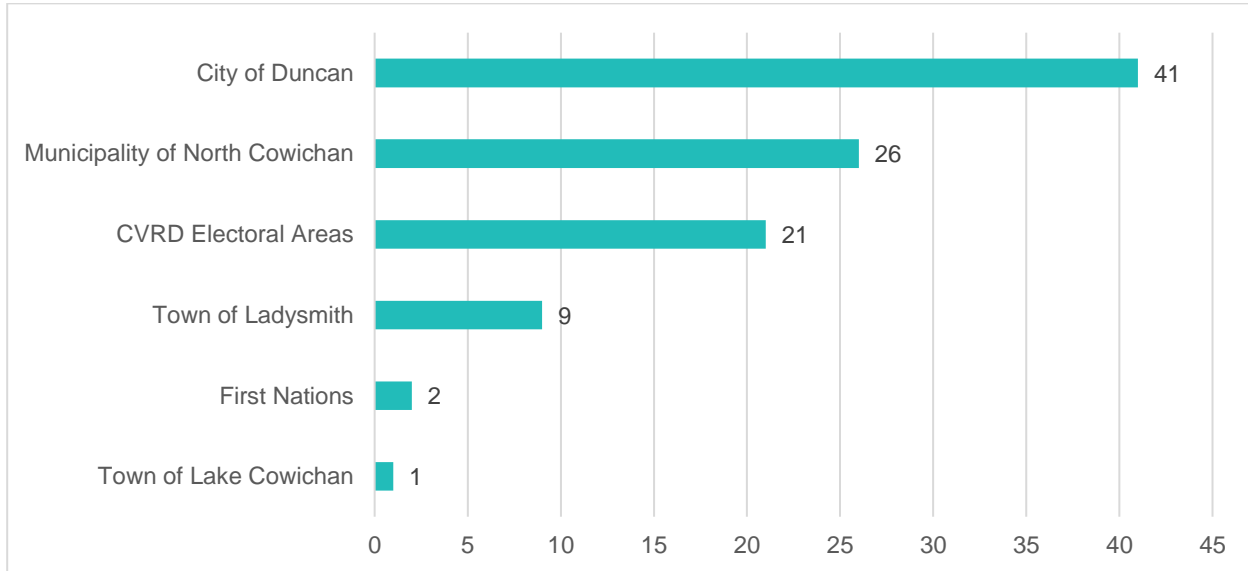
Table 1.1 Cowichan business counts for December 2019⁶

NAICS2 Description	No Employees	Employment Size Range							Total with Employees	All Sizes
		1 to 4	5 to 9	10 to 19	Less than 20	20 to 49	50 to 199	200+		
Total, All Industries	14,736	1,722	651	358	2,731	205	91	13	3,040	17,776
Utilities	12	2	0	1	3	0	0	0	3	15
Public Administration	2	2	7	4	13	4	5	3	25	27
Mining & Oil & Gas Extraction	19	7	2	0	9	0	0	0	9	28
Management of Companies & Enterprises	42	7	0	3	10	0	0	0	10	52
Information & Cultural Industries	142	11	3	3	17	1	0	0	18	160
Wholesale Trade	157	41	15	14	70	7	1	1	79	236
Transportation & Warehousing	243	40	19	13	72	4	2	0	78	321
Educational Services	381	18	7	4	29	2	2	3	36	417
Accommodation & Food Services	242	37	48	33	118	42	17	0	177	419
Finance & Insurance	395	48	22	15	85	13	2	0	100	495
Manufacturing	351	62	36	25	123	21	14	3	161	512
Arts, Entertainment & Recreation	505	26	11	7	44	4	4	0	52	557
Unclassified	609	130	24	8	162	1	1	0	164	773
Admin. & Support, Waste Mgmt. & Remedion.	847	65	26	9	100	8	3	0	111	958
Health Care & Social Assistance	726	185	56	35	276	15	6	0	297	1,023
Retail Trade	706	145	102	71	318	37	18	3	376	1,082
Agriculture, Forestry, Fishing & Hunting	992	98	35	22	155	12	8	0	175	1,167
Other Services (excl. Public Administration)	1,052	155	67	23	245	5	3	0	253	1,305
Construction	1,292	312	122	46	480	20	3	0	503	1,795
Professional, Scientific & Technical Services	1,547	237	34	14	285	7	1	0	293	1,840
Real Estate & Rental & Leasing	4,474	94	15	8	117	2	1	0	120	4,594

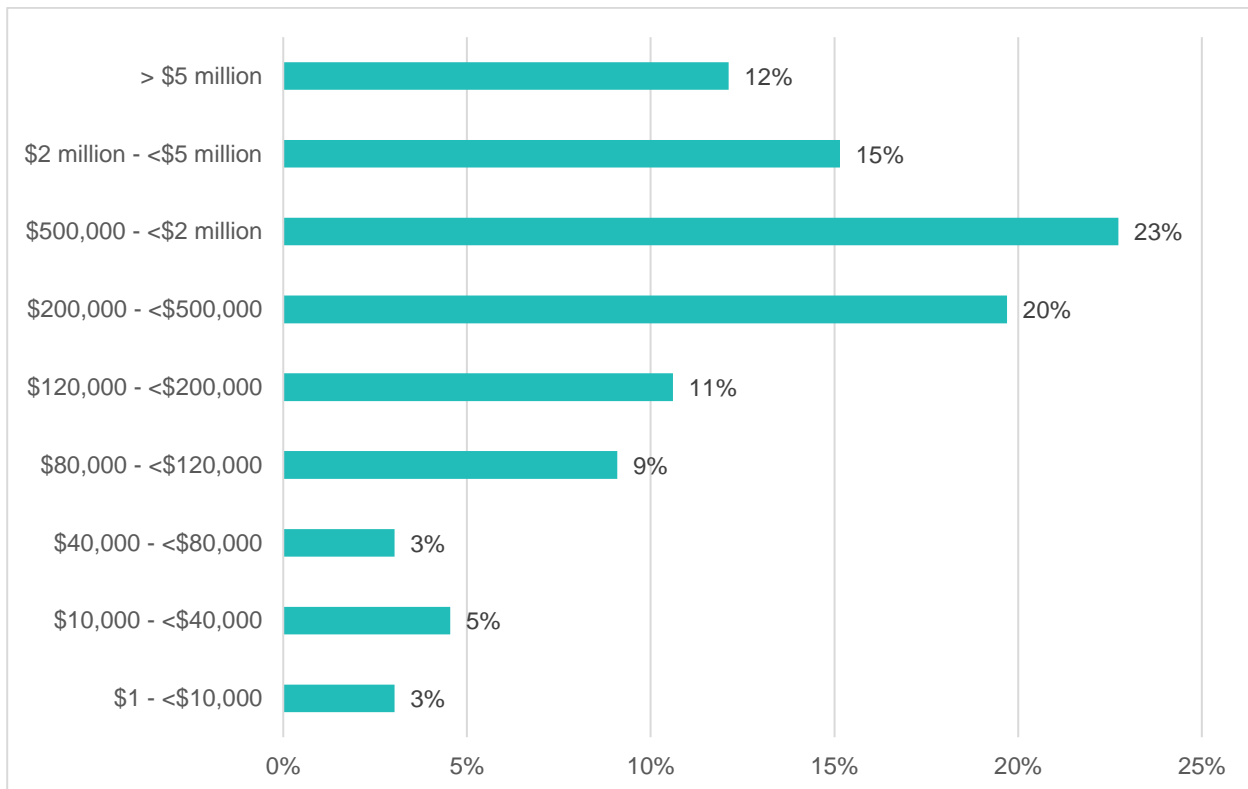
⁶ BC Number of Businesses & Employment by Industry, <https://www2.gov.bc.ca/gov/content/data/statistics/business-industry-trade/number-of-businesses-and-employment-by-industry>



Graph 1.1 Location of businesses surveyed (n=100)

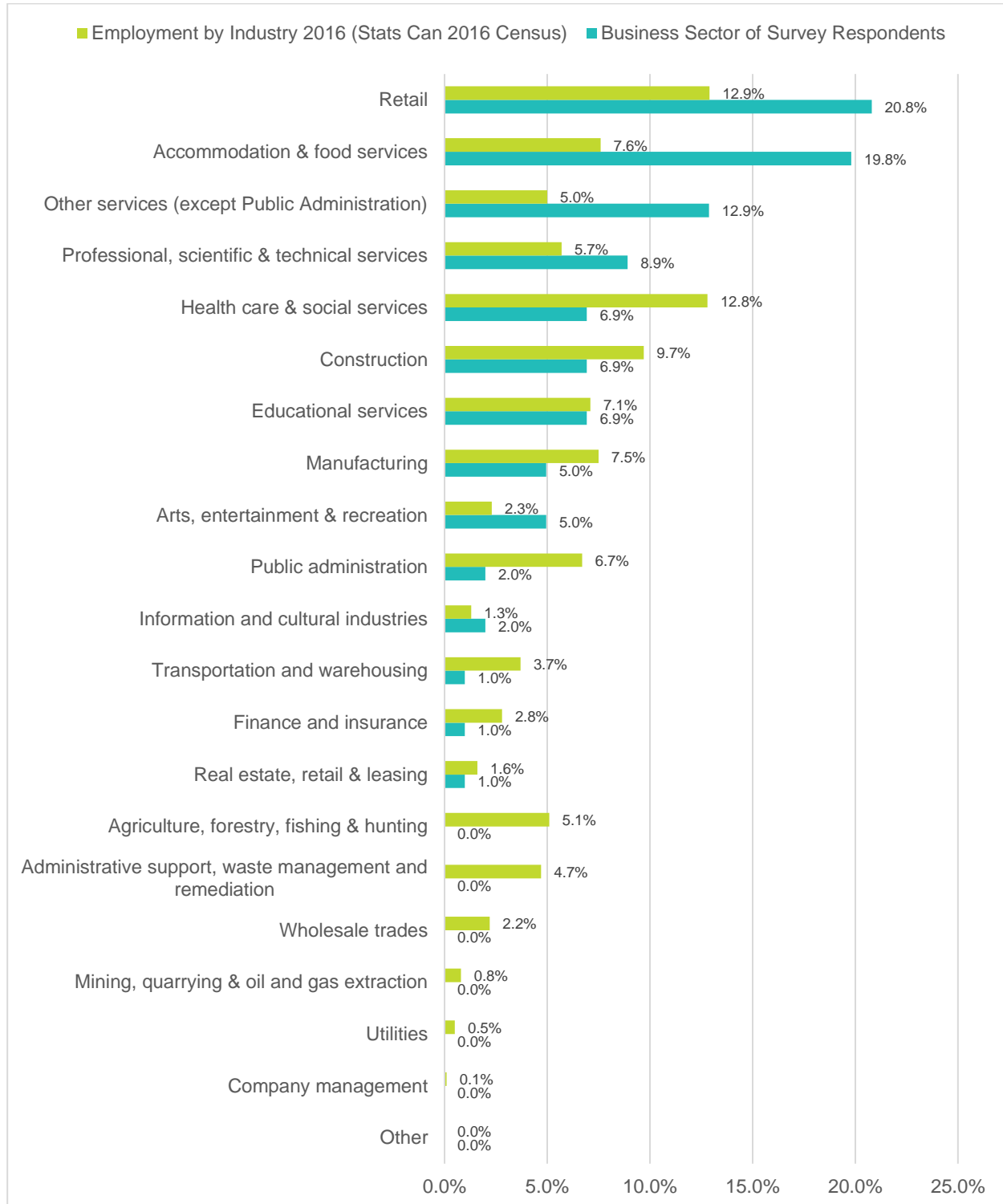


Graph 1.2 What are your annual sales levels? (n=66)



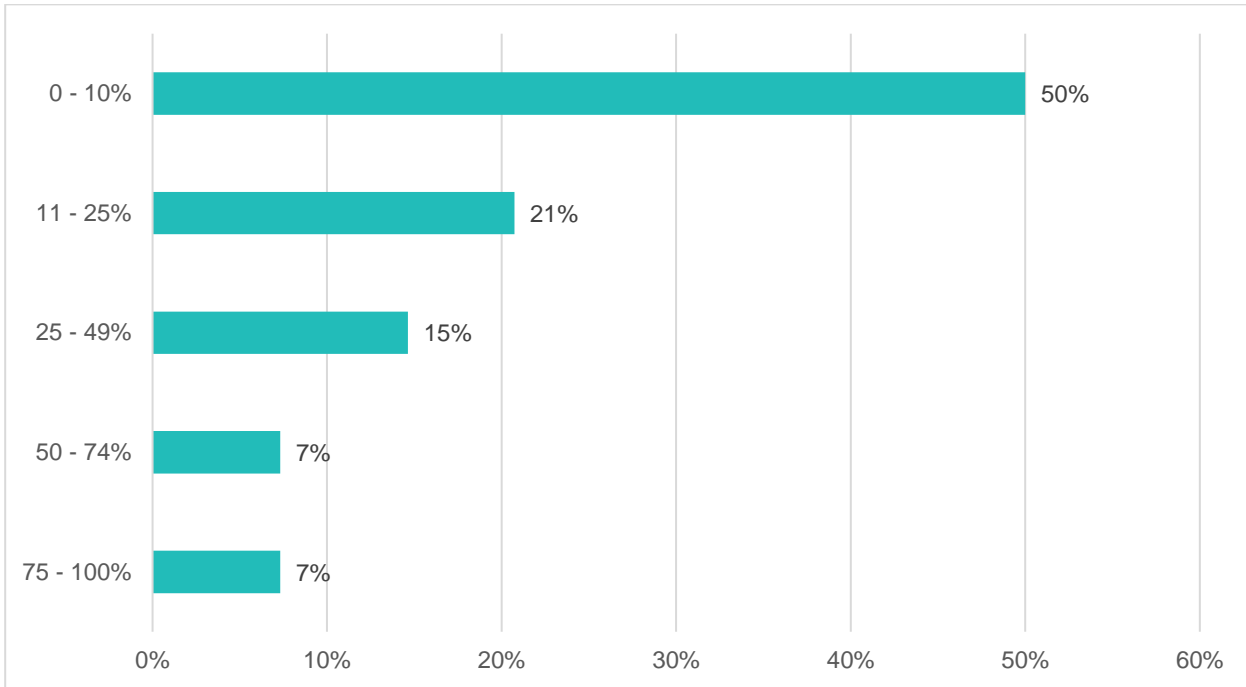


Graph 1.3 Sectors of Cowichan businesses surveyed compared to regional employment by industry

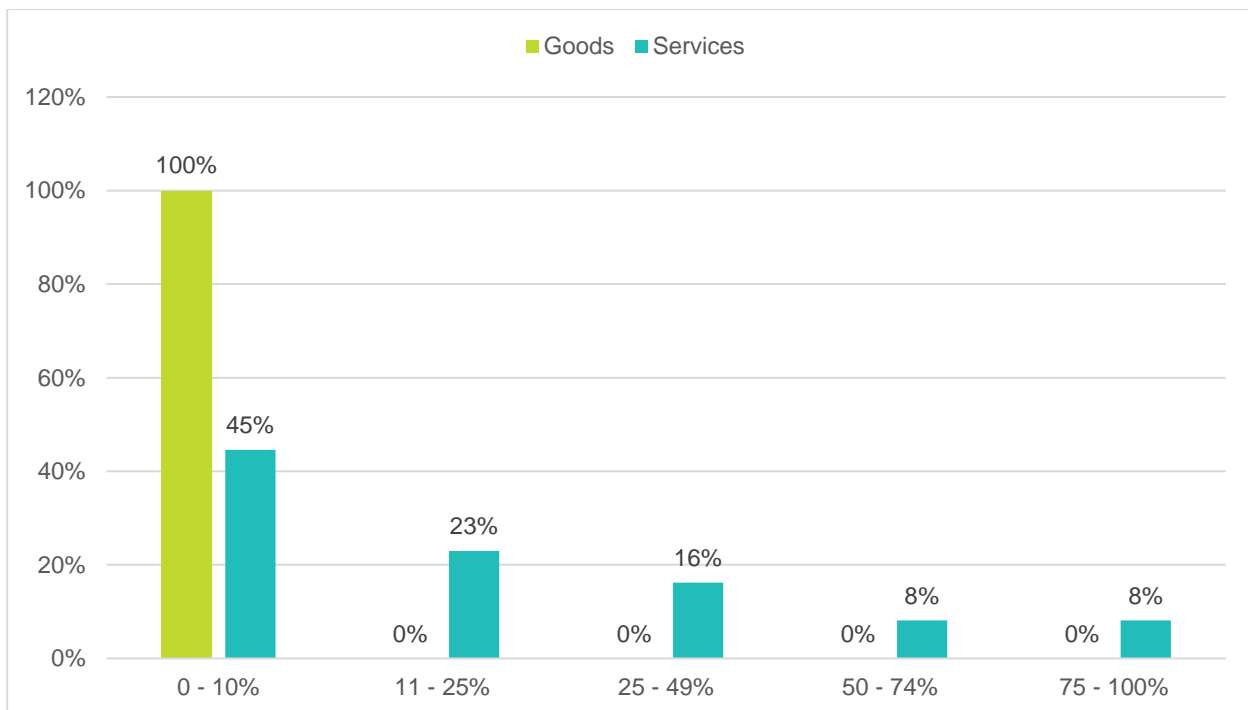




Graph 1.4 What percentage of your sales income do you typically derive from tourism, if any? (n=82)

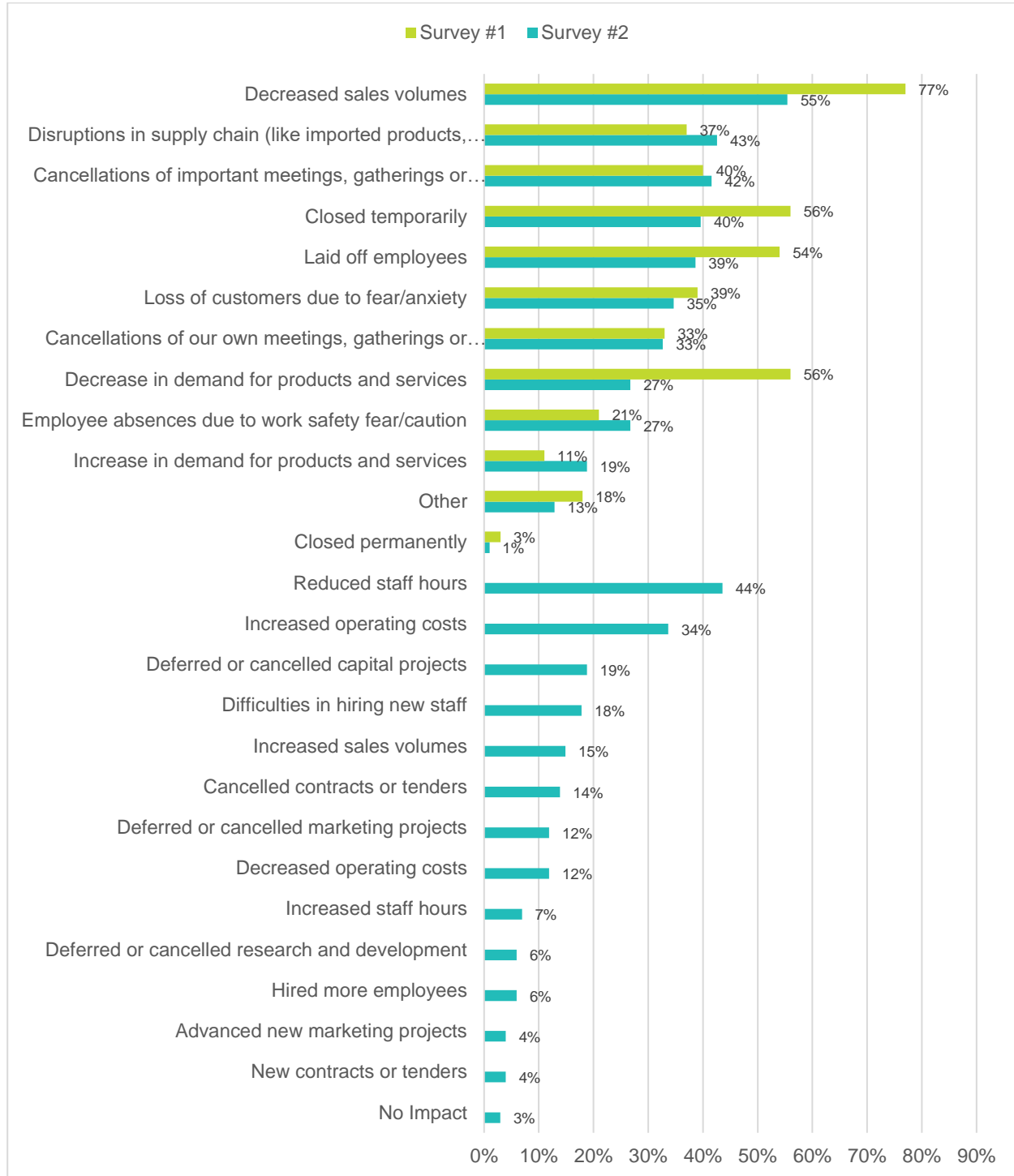


Graph 1.5 Percentage of sales income derived from tourism by sector



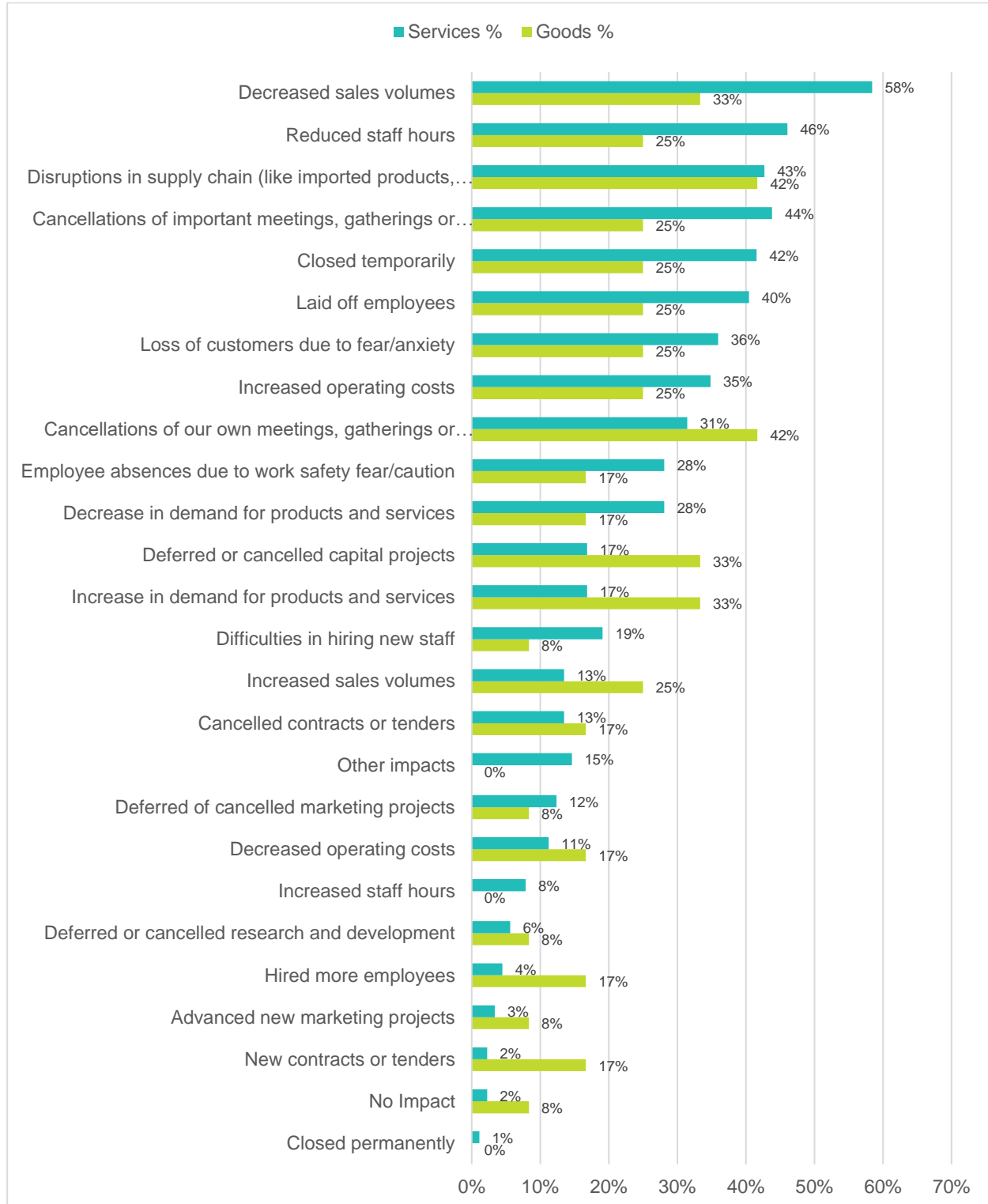


Graph 1.6 How has COVID-19 impacted your business? (n=101)



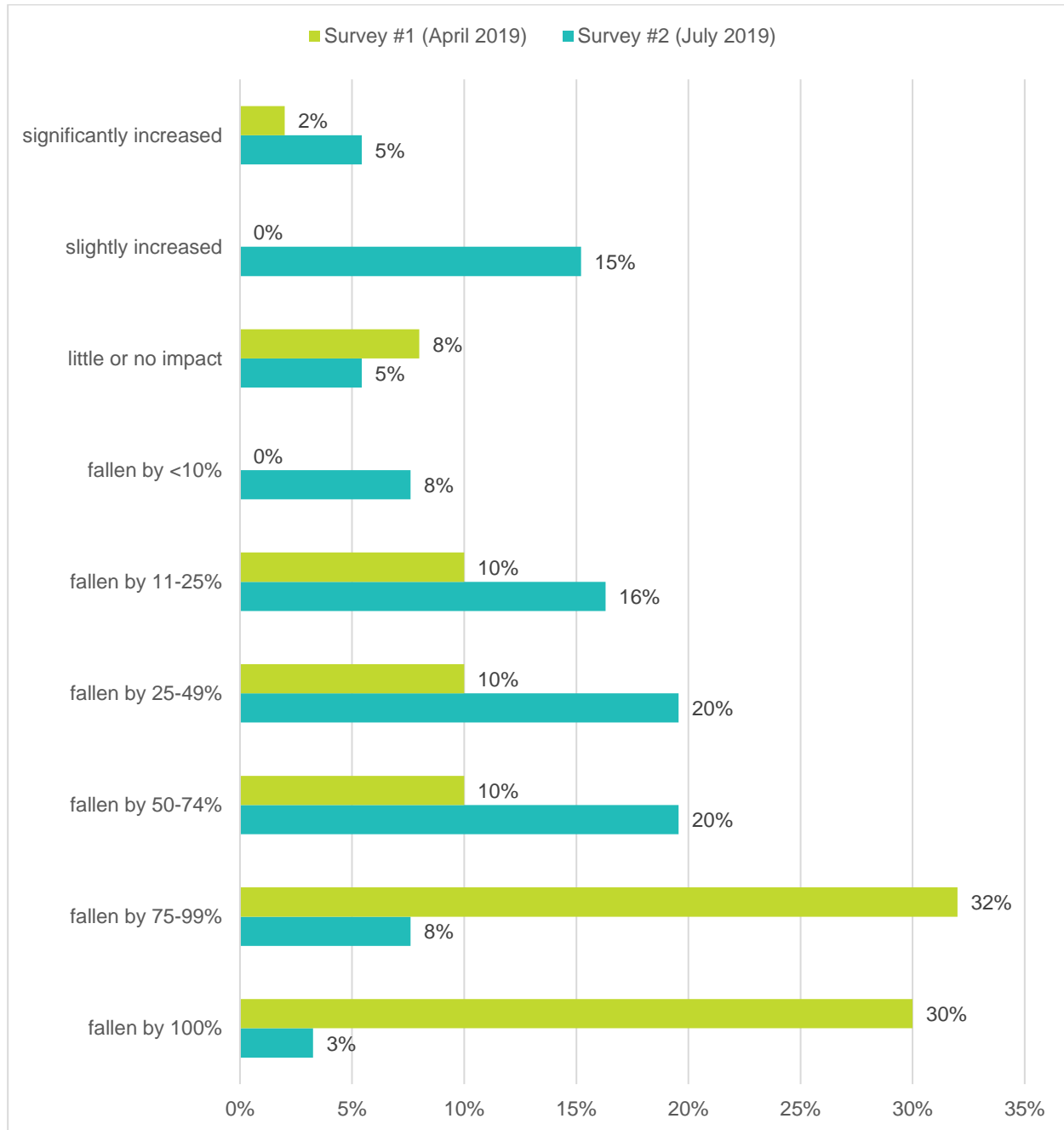


Graph 1.7 Impacts of COVID-19 by sector



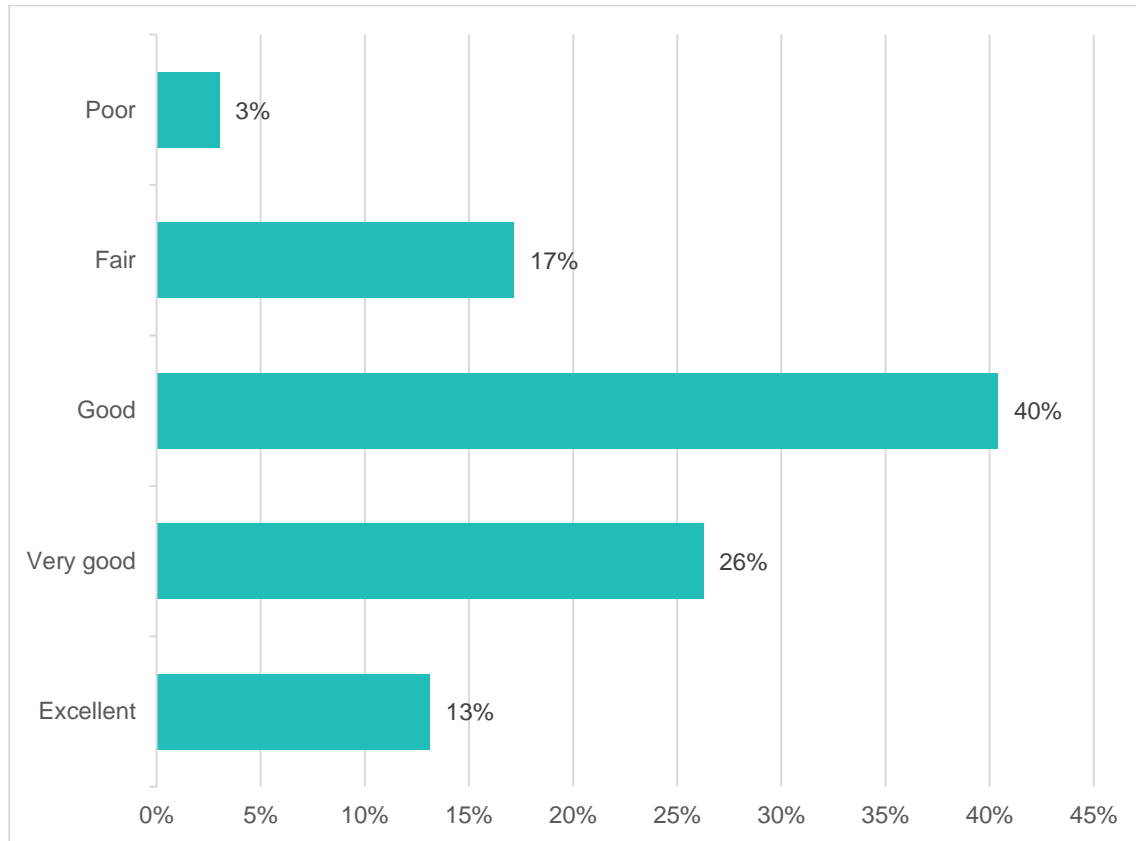


Graph 1.8 How does your revenue stream compare with July 2019? (n=92)

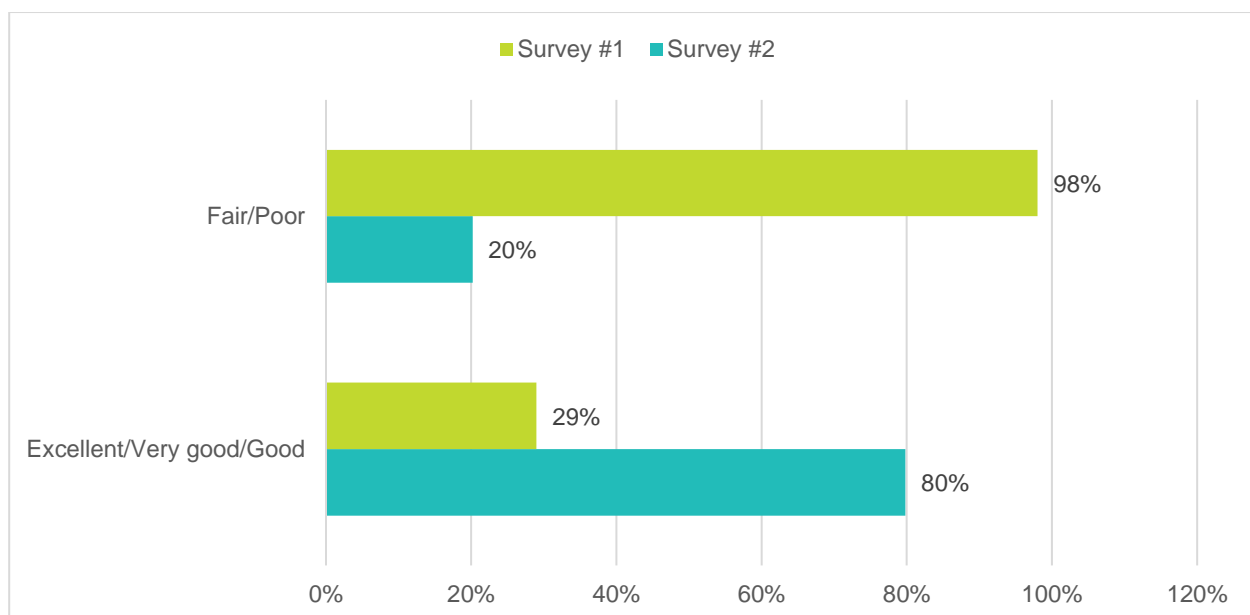




Graph 1.9 How would you describe your current mental wellbeing? (n=99)

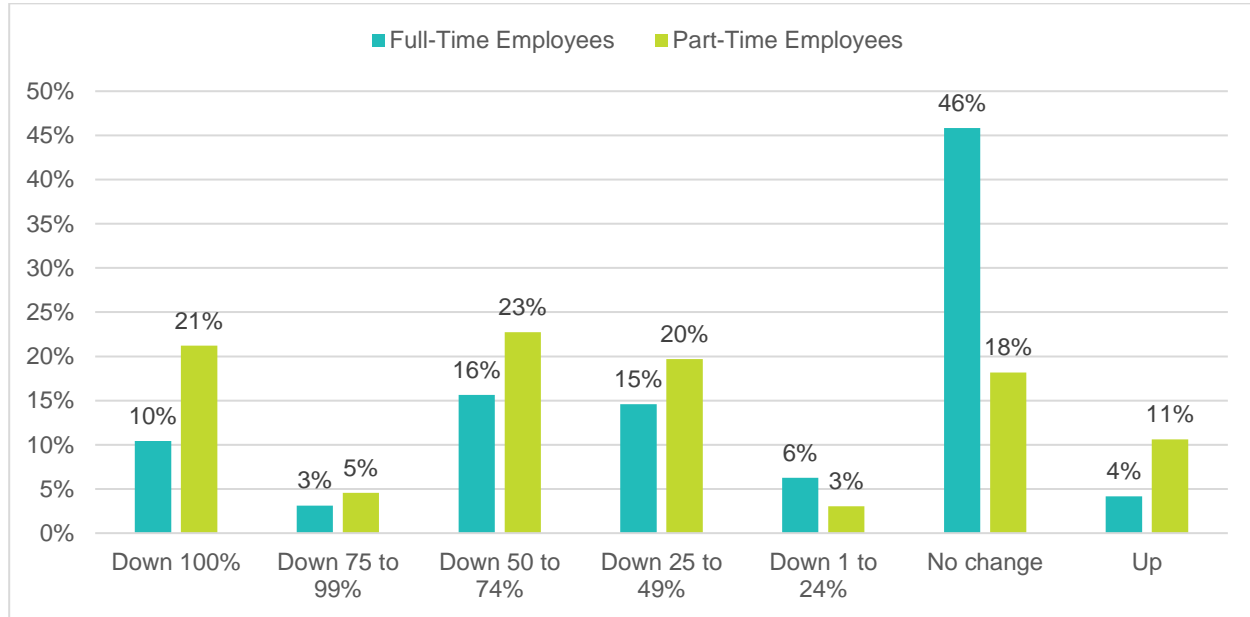


Graph 1.10 Mental wellbeing for survey #1 and survey #2

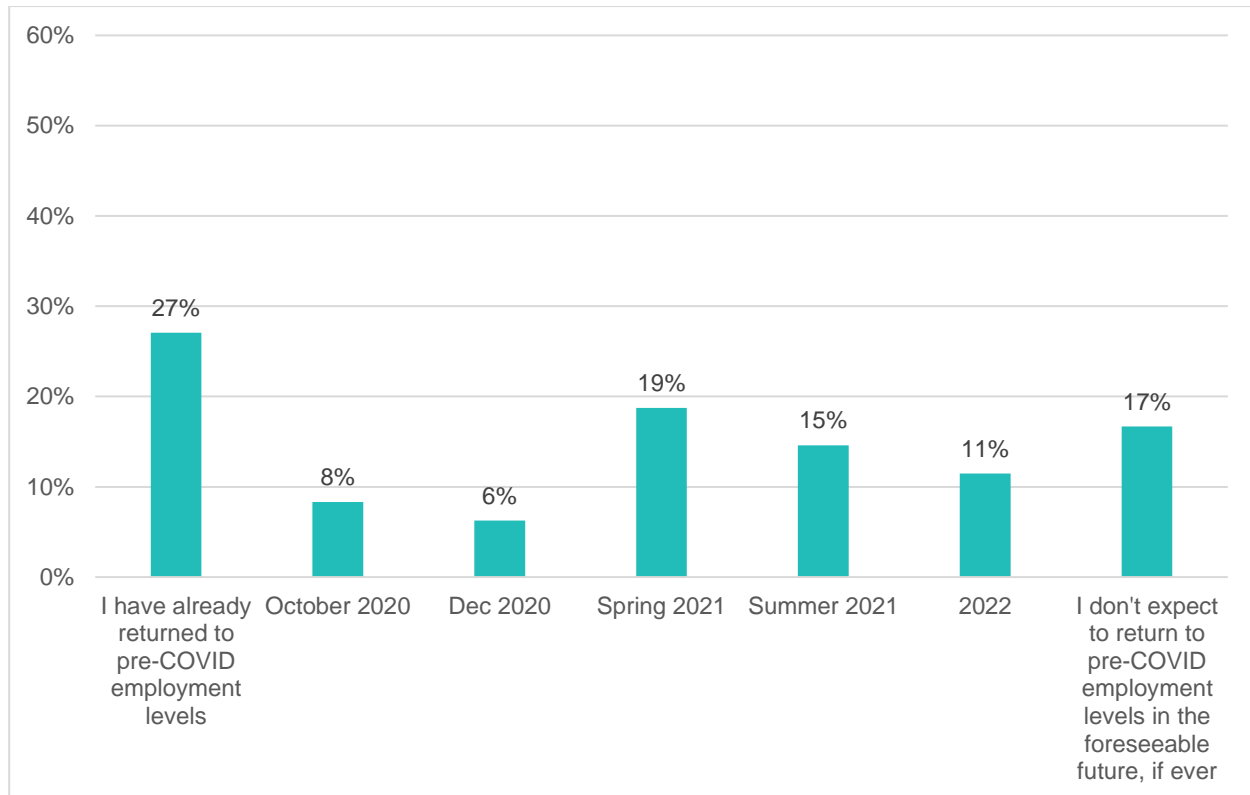




Graph 1.11 Changes in staffing levels compared with July 2019 (n=100)

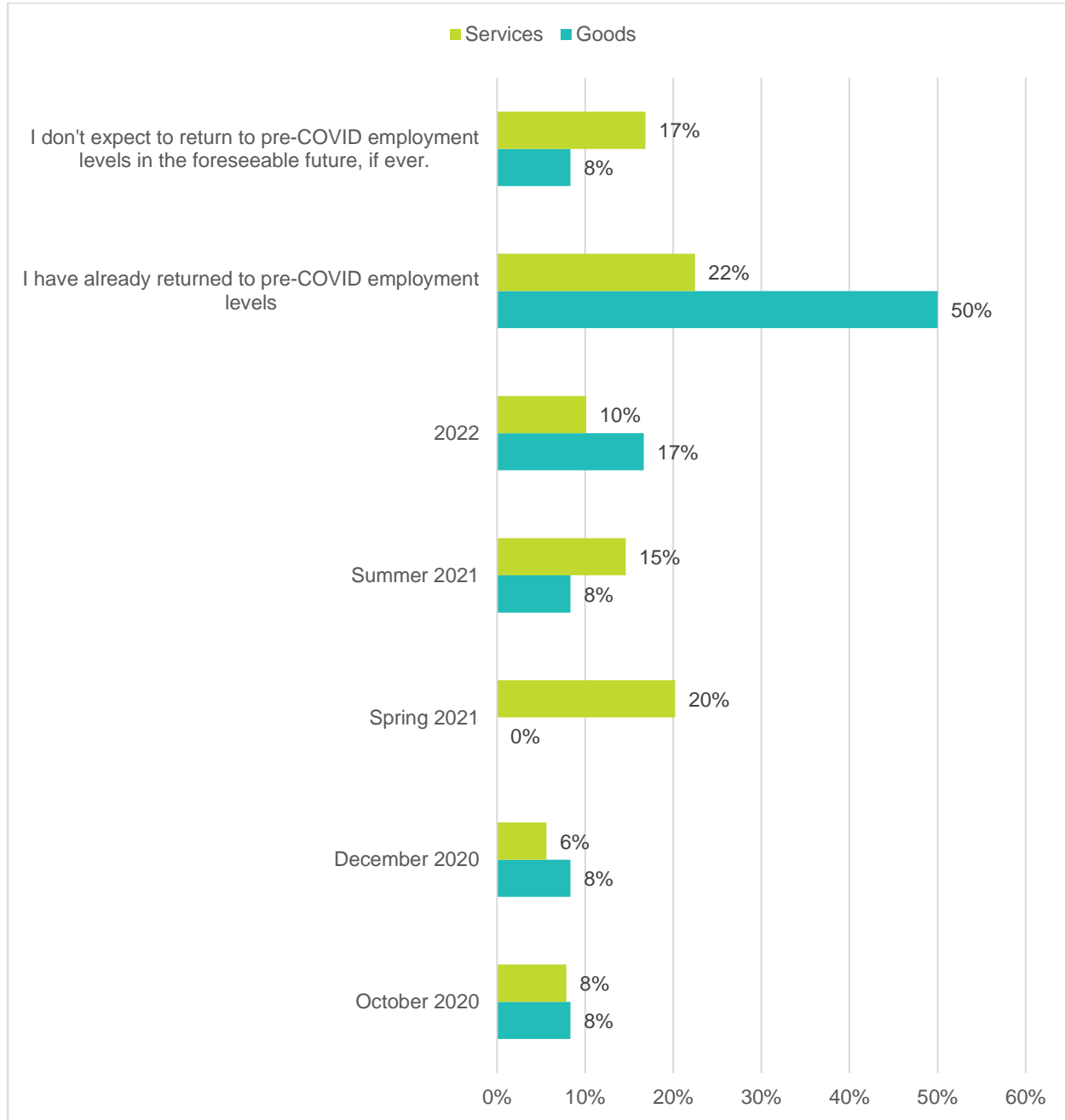


Graph 1.12 When do you expect to return to pre-COVID employment levels? (n=96)



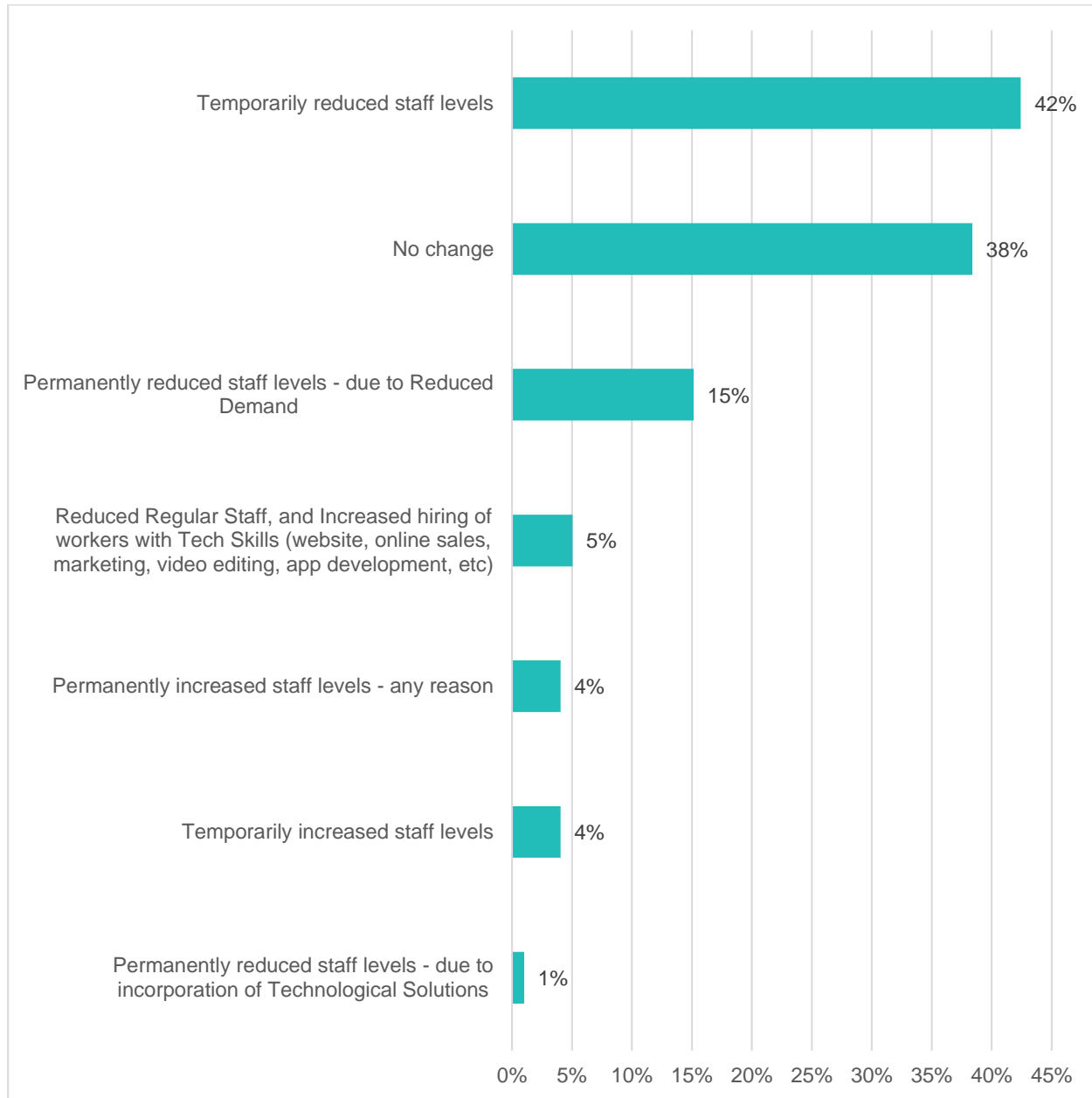


Graph 1.13 Return to pre-COVID employment levels by sector



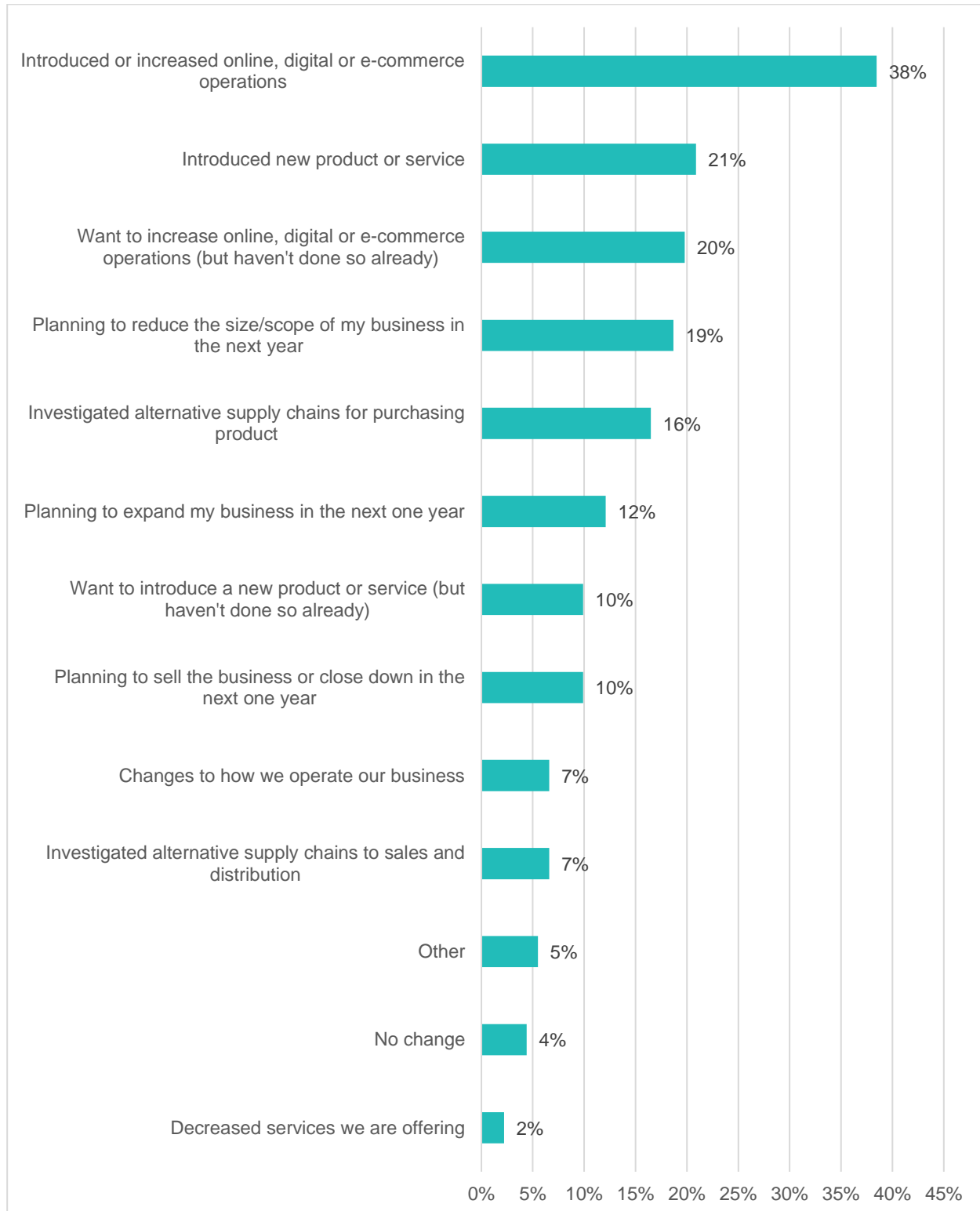


Graph 1.14 How have your hiring decisions changed as a result of this crisis? (n=99)



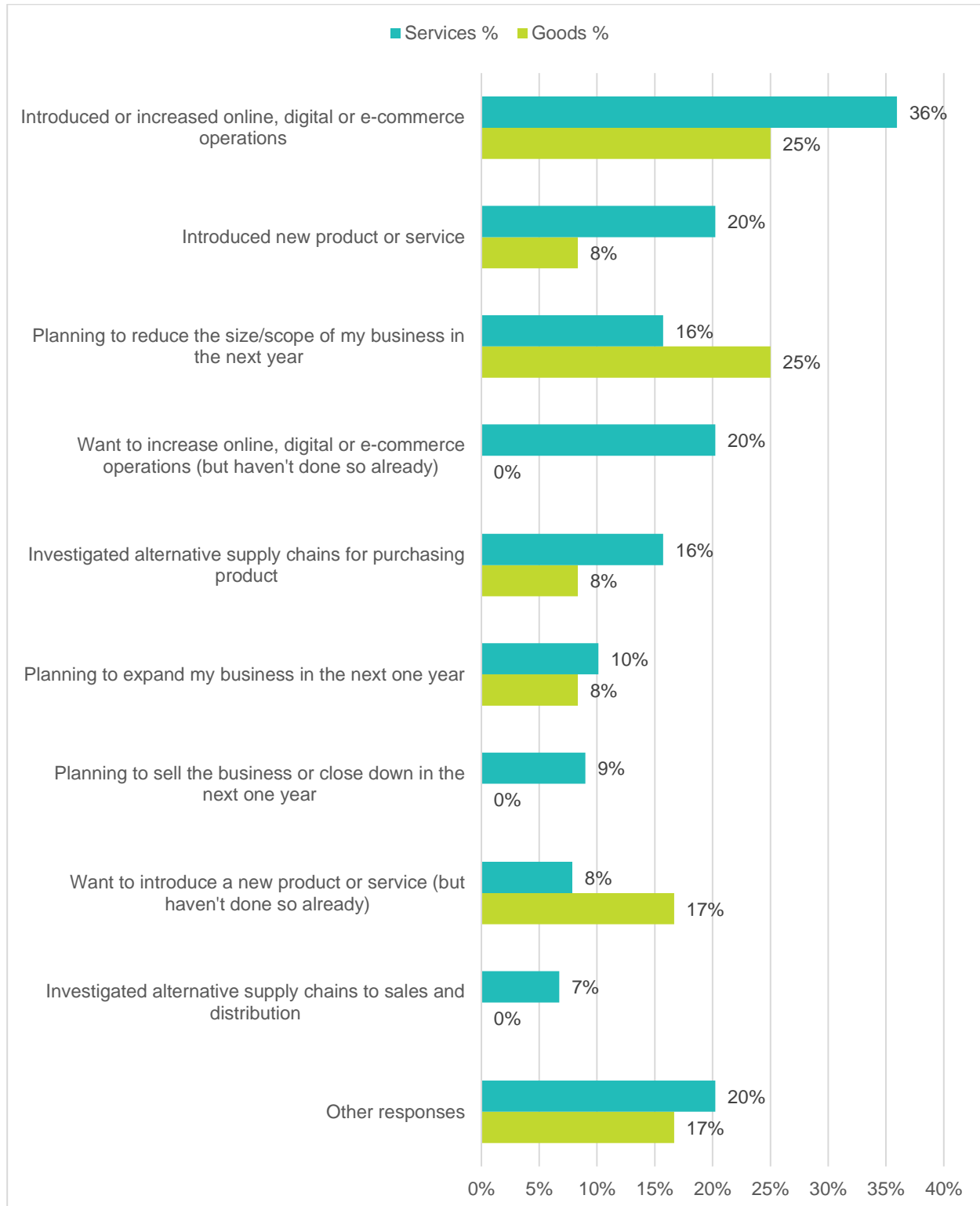


Graph 1.15 How has your business responded to COVID-19? (n=91)



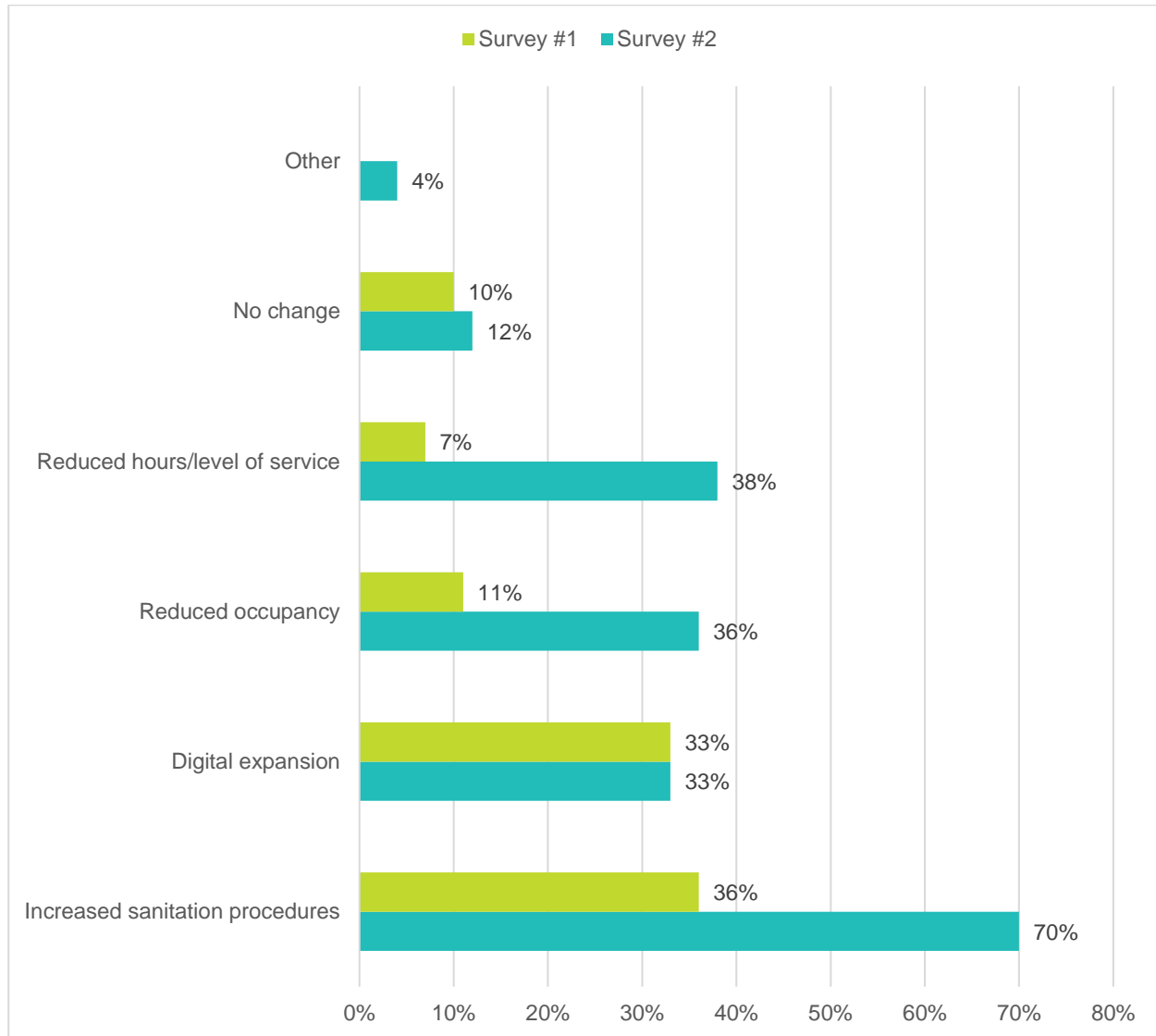


Graph 1.16 Responses to COVID-19 by sector



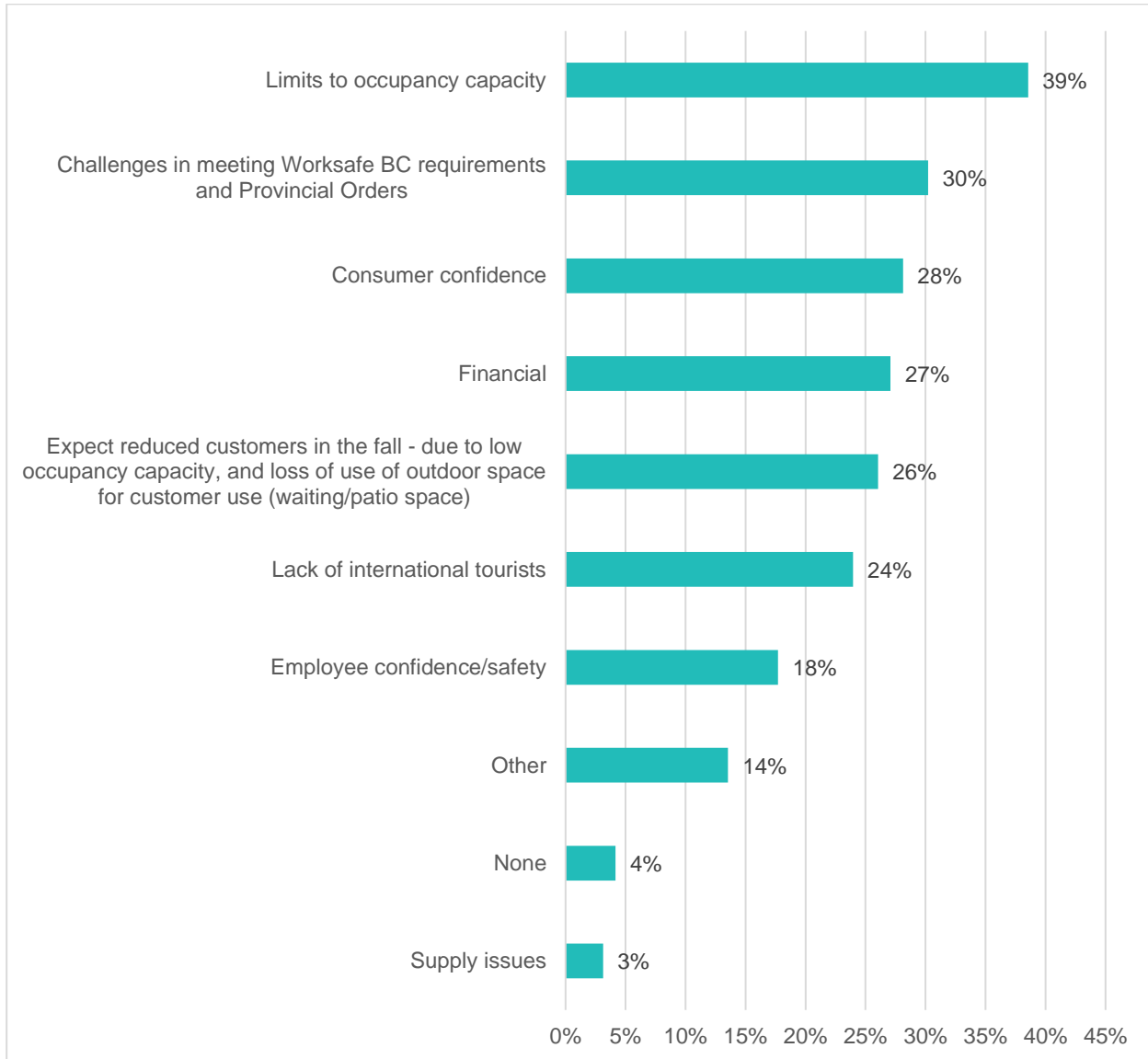


Graph 1.17 What are some permanent changes in your business model? (n=100)



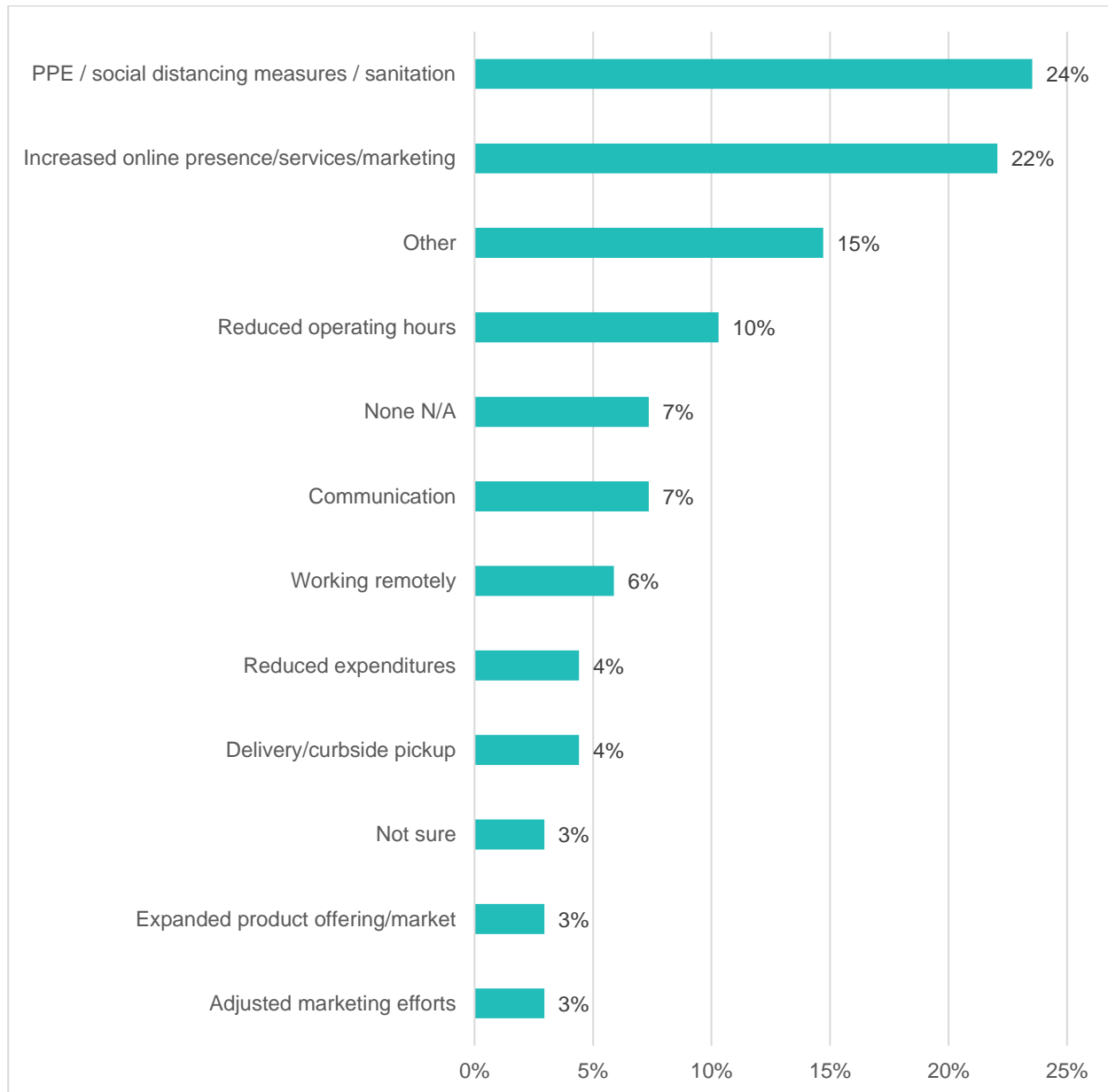


Graph 1.18 What are the greatest challenges you have in returning to regular business operations? (n=96)



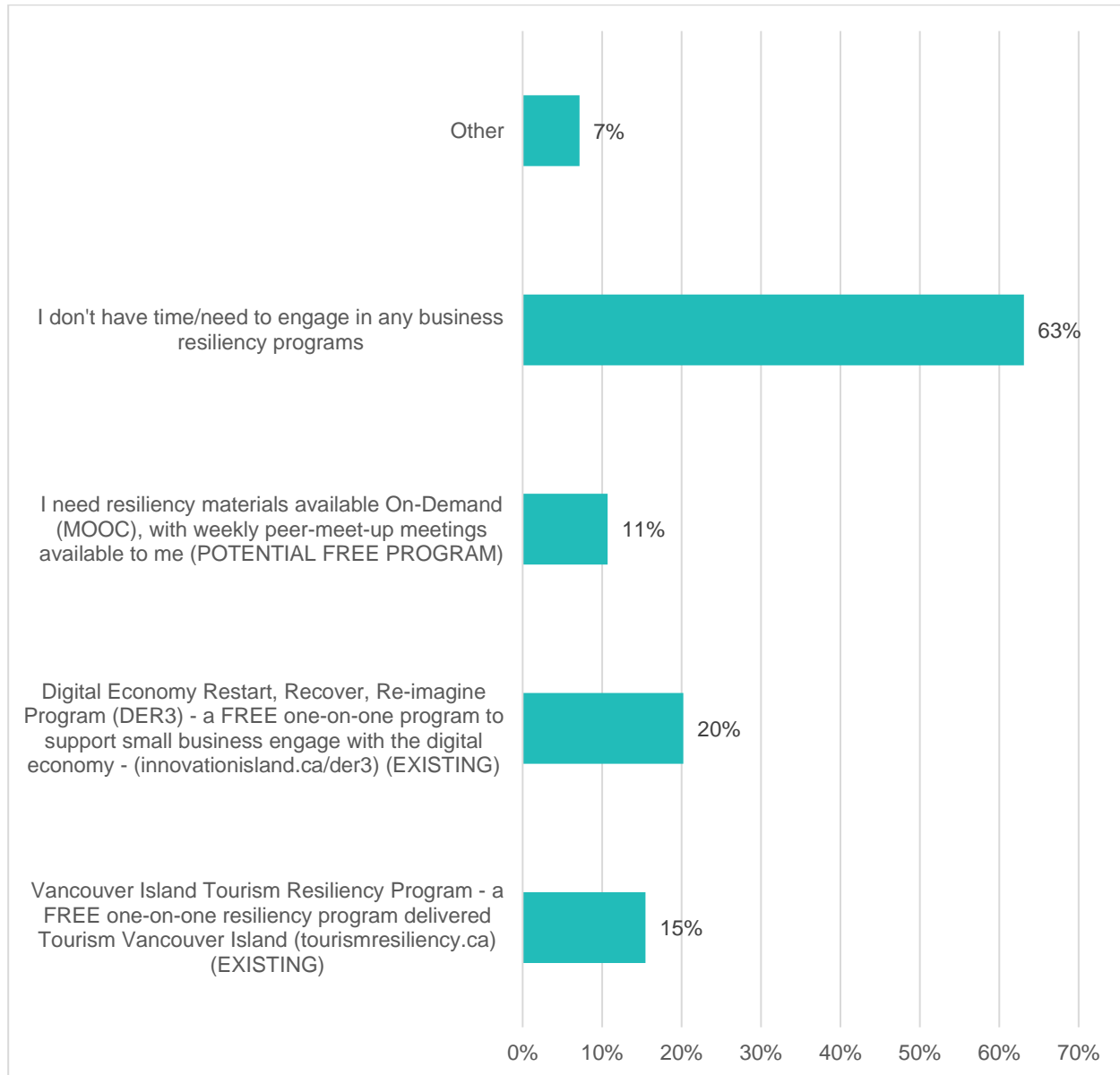


Graph 1.19 What is the biggest operational change you have made to help ensure the viability of your business (that others could learn from)? (n=68)



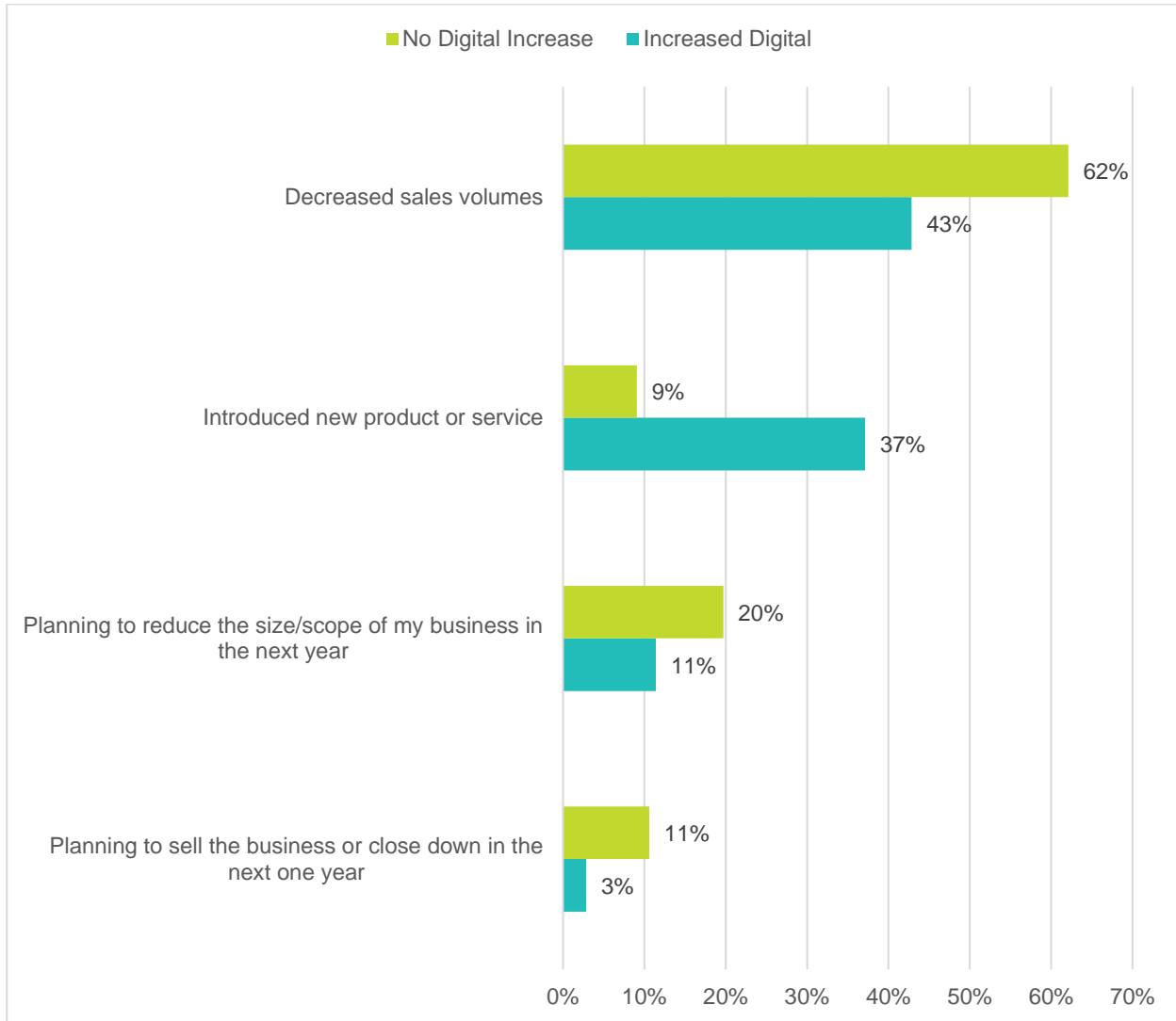


Graph 1.20 Which business resiliency programs are you most interested in? (n=84)



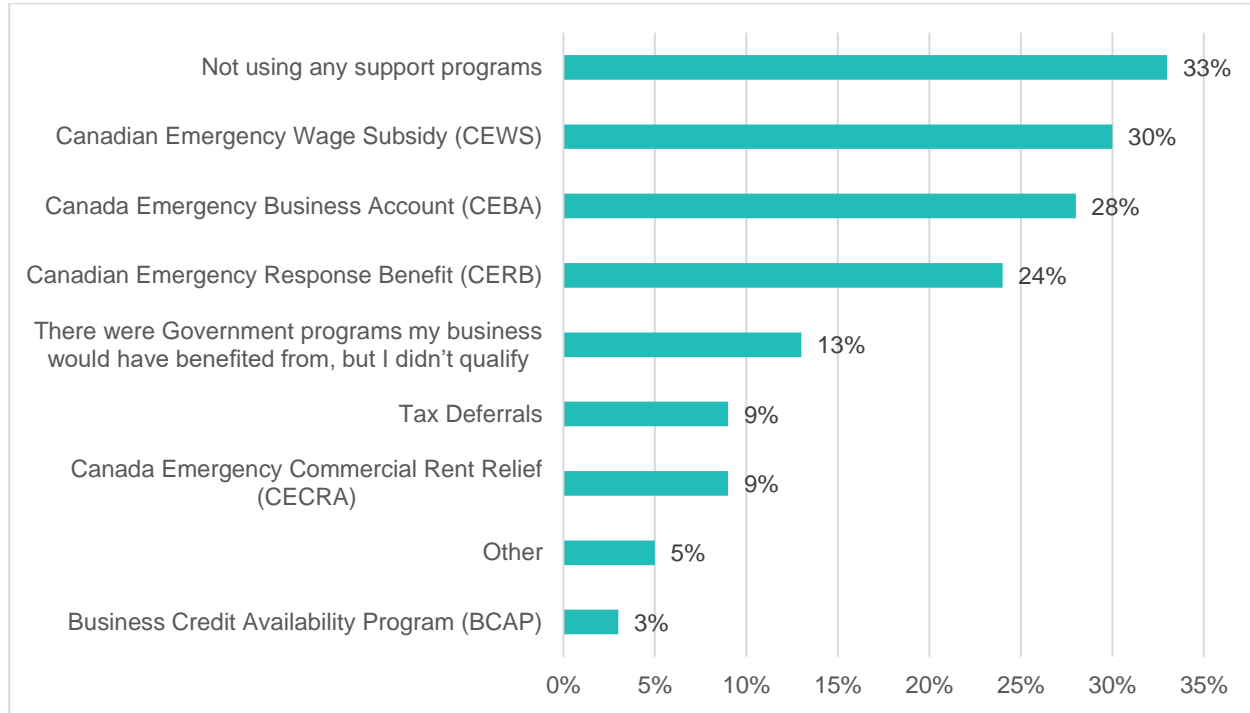


Graph 1.21 Relationship between engagement in the digital economy and response to the crisis

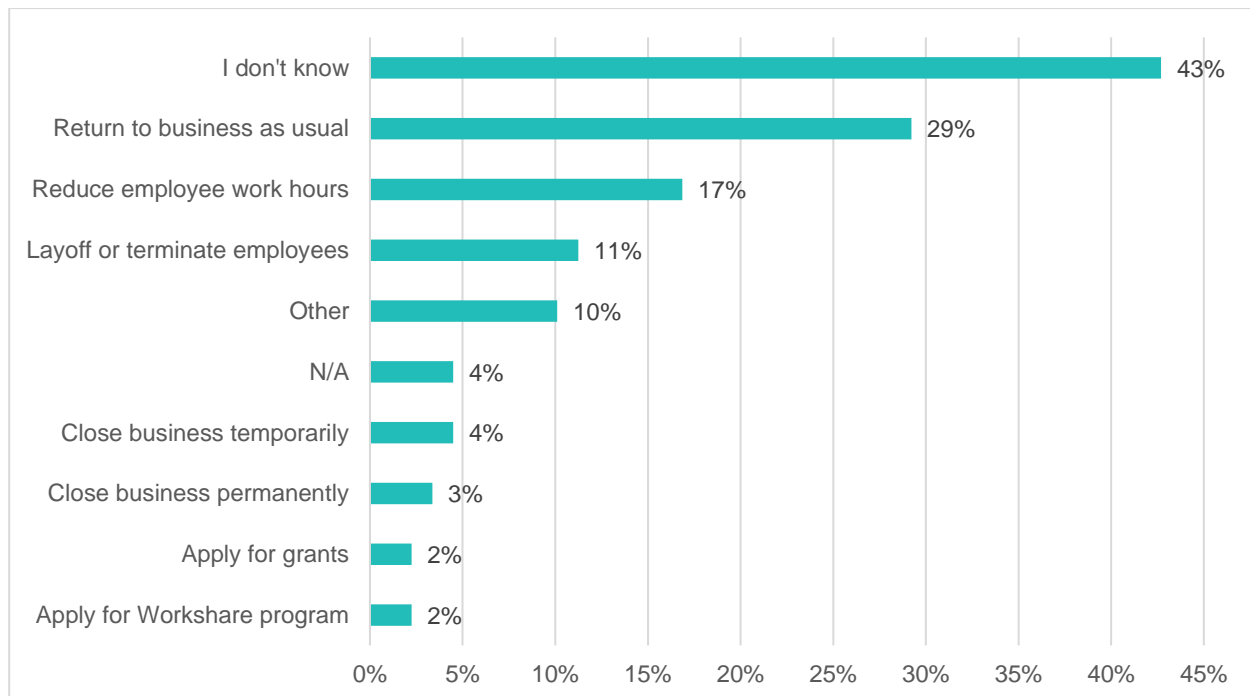




Graph 1.22 Are you using any government support programs? (n=100)

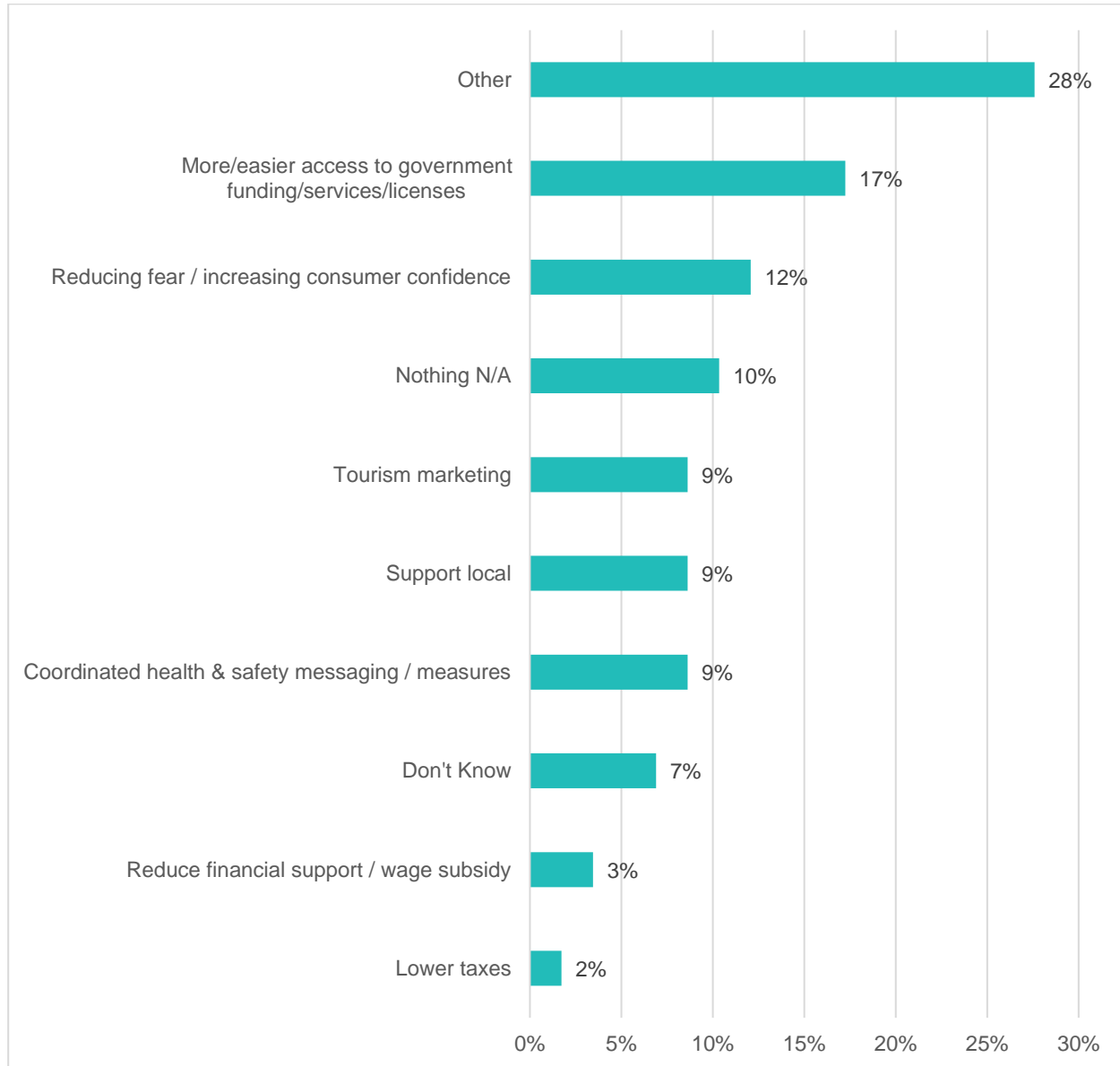


Graph 1.23 What is your business planning to do once government support ends? (n=89)





Graph 1.24 What actions/initiatives coordinated on a regional scale would greatly support the recovery of your business sector or that of the regional economy? (n=58)





Appendix A: Open Ended Responses

Below are the responses to two open-ended questions, entered as free text in the survey. Each bullet is an individual response. Text that may identify the author has been removed to maintain survey privacy.

What is the biggest operational change you have made to help ensure the viability of your business (that others could learn from)? (n=68)

- *Not sure. We've done everything but no product means no sales*
- *Diversification in service. Expanded awareness via recommendations*
- *Use of masks in my office*
- *Expanded the floor space to accommodate in an attempt to allow (at least) the same number of customers as pre-COVID*
- *Expanding online services*
- *Being informed*
- *Put attractive permanent markings on the floor (my logo) to help people keep their distance safely. Slightly reducing hours to be less dependant on staffing challenges, but still maintaining adequate opening hours to be profitable*
- *Closed my office, switched to online work*
- *Focus on customer immediate needs to bridge the current situation*
- *Internet advertising*
- *Reduced store hours. Now closed 2 days per week*
- *Limited operating hours*
- *Word of mouth marketing aggressively*
- *Create a safe environment that patients feel comfortable visiting - protocol is universal precautions (treat all as if infected)*
- *More online presence*
- *We are switching to a more digital media environment to attract new clients and better support existing clients*
- *Employees now working mostly from home offices. Shortened work week to 4 days.*
- *Be proactive in reducing expenditures*
- *Streamlining products*
- *Requiring customers and staff to wear a mask and sanitize their hands before entering the store*
- *We have reduced the number of days and the number of hours the shop is open*
- *No changes*
- *Connect with other owners*
- *Staff work remotely from home*
- *Reduced our hours and staff*
- *Allowing only one family at a time as opposed to previously 2*
- *Increasing digital platform - not for sales but marketing. Picking up more clients outside of BC*
- *Needed to have a strong supported vision with the desire to see the success through a transition. Go public and explain the situation*
- *Online sales and delivery*
- *Sanitation*
- *Expanded into new areas*



- *Went from 25% digital to 90%*
- *Communicate better with your staff and customers*
- *Sanitation!*
- *Was going to retire. Can't as we have to lay off staff and continue working. As owner of the business, we currently do not take a wage in order to keep the business running.*
- *Downsized*
- *Trying to trim costs*
- *Expansion into online sales (for both mail order and curbside pickup)*
- *Outdoor classes only, reduced number of students per class, more online teaching (where possible)*
- *Availability through online presence and response (social media, emails, texts, etc.)*
- *Reducing hours, we are open to the public to allow staff to perform some of their duties before store hours (ordering, stocking, cleaning)*
- *Social media marketing - one staff person responsible*
- *Good communication of expectations*
- *Employees do multiple roles (Front Desk also prepares breakfast; housekeeping also does some pool and grounds tasks)*
- *Window service only*
- *Creative use of social media for social action campaigns, outdoor services*
- *Worked with other businesses to become hyper-local*
- *Quicker turnover of tables*
- *Working from home offices and adapted our services and products*
- *Increased communication with the public/our members regarding hygiene within our facilities*
- *Sanitization is key*
- *Developed with all employees' input a COVID plan for us all to abide by*
- *Sanitized stations throughout the building. Feel safe doing that. Also sanitizing first thing in the morning and once in afternoon good habit to get into*
- *Not to let the Government executed scare tactic of COVID become a mindset within our employees. We instill safety and preventive measures with consciousness and awareness of COVID*
- *Directional arrows, queuing spots*
- *Positive attitude*
- *COVID control measures*
- *Gone online*
- *Establish sanitation and other COVID protocols*
- *All visitor interactions using masks on both sides*
- *Still not clear*
- *Instagram posts*

What actions/initiatives coordinated on a regional scale would greatly support the recovery of your business sector or that of the regional economy? (n=58)

- *Not sure*
- *Remove fear in the general population*
- *More regional grant opportunities*
- *Everyone wearing a mask always while in public*



- *Shop Local - Shop Local - Shop Local*
- *Ensure local government shops locally*
- *Affordable housing*
- *Help tourism rebound to Vancouver Island*
- *Rules that allow the breaking of leases from landlords who refused to access rent relief*
- *As a sole proprietor of a small business, I did not qualify for most of the supports. I'm not sure what kind of support would help me to not fall through the cracks as I have*
- *Support hospitality business with flexible bylaws, support small businesses with equipment and materials to improve COVID safety and reduce their expenses towards this*
- *Do not know*
- *Stop the financial supports*
- *Support from local governments*
- *Creating a culture of outdoor shopping and dining like they have in Europe. Many cities in Europe close the city centre streets at certain times or permanently and allow shops and restaurants onto pavements and roads to trade, even pre COVID. The outdoor farmers market is the only time we see anyone in our downtown now. It's become a ghost town as people are scared.*
- *N/A for our business*
- *Increased media messaging with community letting them know that it is safe to resume previous activities if all COVID safety measures are in place and respected by all*
- *Help lower fixed costs for businesses wherever possible*
- *Consumer confidence*
- *Not sure*
- *Encourage tourism with visitors from other parts of the island and the rest of Canada*
- *My sector is stable*
- *Coordinated messaging in safety*
- *Easier wage subsidy qualifications*
- *Free advertising*
- *More support for sole proprietors. The \$40k loan is impossible to get as many of my fixed costs are eligible*
- *Don't know*
- *Reduce the wage subsidy*
- *Reduce Property Taxes*
- *A super focused local marketing program*
- *CVRD planning dept needs to implement cannabis retail zoning changes approved by the board last fall*
- *Staff education about sanitary procedures*
- *Access to business resources such as financial advisors, bookkeepers and planners as well as funds*
- *Support for staff who need to be off if they or their children are sick*
- *CVRD help with parking; still the biggest problem in Cowichan Bay*
- *Research into what contributes to consumer confidence*
- *Encouraging local travel*
- *Collaboration with key stakeholders for community sharing/distribution of emergency funds which we have done and most stakeholders collaborated but a few were self-serving*
- *Creating hyper-local incentivization, marketing, assistance in 'hubbing' businesses as much as possible. Creating business pods*



- *Creating a vaccine so we can have tables closer than six feet and do larger functions*
- *Greater transition into digital services*
- *Nothing*
- *It should be mandatory to wear masks*
- *More tourism marketing*
- *Clear all the extra and normal red tape for permits and licences so one can proceed efficiently with projects. More expedient inspections. Have tools and resources in place that help businesses to weather the impact of any disasters. We have to keep the country running. Shutting it down should not be an option. The impact affects people more disastrously than the Pandemic itself.*
- *Support local initiatives*
- *It is time to work together and implement the United Nations Declaration of Indigenous People in all aspects; prenatal to Elderhood.*
- *Reduce taxation at the municipal level*
- *Reduce the size of local government, North Cowichan to take over the City of Duncan*
- *None needed*
- *Unilaterally adopted COVID protocols*
- *Mandated mask-wearing and efficient and thorough contact tracing to keep COVID rates low so people have the confidence to go to restaurants and hotels*
- *Working with School Districts to enroll High School students in online courses and practice groups for diversity education*
- *The supply chain for shipping and receiving needs to be mended!*
- *Confidence in the fact that there is not a 2nd wave of COVID-19*



Appendix B: Other Resources

BC Mind Reader COVID Impact Pulse Check Surveys -

<https://www.bcmindreader.com/hub/posts/banner-1-network-25520864>

BC Tourism Resiliency Network Research - <https://tourismresiliency.ca/reports/>

Statistics Canada July 2020 Labour Force Survey - <https://www150.statcan.gc.ca/n1/daily-quotidien/200807/dq200807a-info-eng.htm>

BC Stats July 2020 Labour Force Highlights -

<https://www2.gov.bc.ca/gov/content/data/statistics/employment-labour/labour-market-statistics>

Business Council of British Columbia Surveys - <https://bcbc.com/insights-and-opinions/how-are-b-c-s-large-employers-faring-through-covid-19-results-from-our-fourth-survey>

Business Council of British Columbia, The 2020 Shutdown: How Deep is the Economic Hole? -

<https://bcbc.com/reports-and-research/the-2020-shutdown-how-deep-is-the-economic-hole>

Business Council of British Columbia, News Release: Stronger Tomorrow, Starting Today Charts a Course to Rebuilding British Columbia's Economy and Personal Prosperity -

<https://bcbc.com/media/news-release-stronger-tomorrow-starting-today-charts-a-course-to-rebuilding-british-columbias-economy-and-personal-prosperity>

Emerging Economy Task Force final report released -

<https://news.gov.bc.ca/releases/2020JEDC0009-000854>

Canadian Federation of Independent Business - <https://www.cfib-fcei.ca/en/research/survey-results/investigating-the-impact-of-covid-19-on-independent-business>