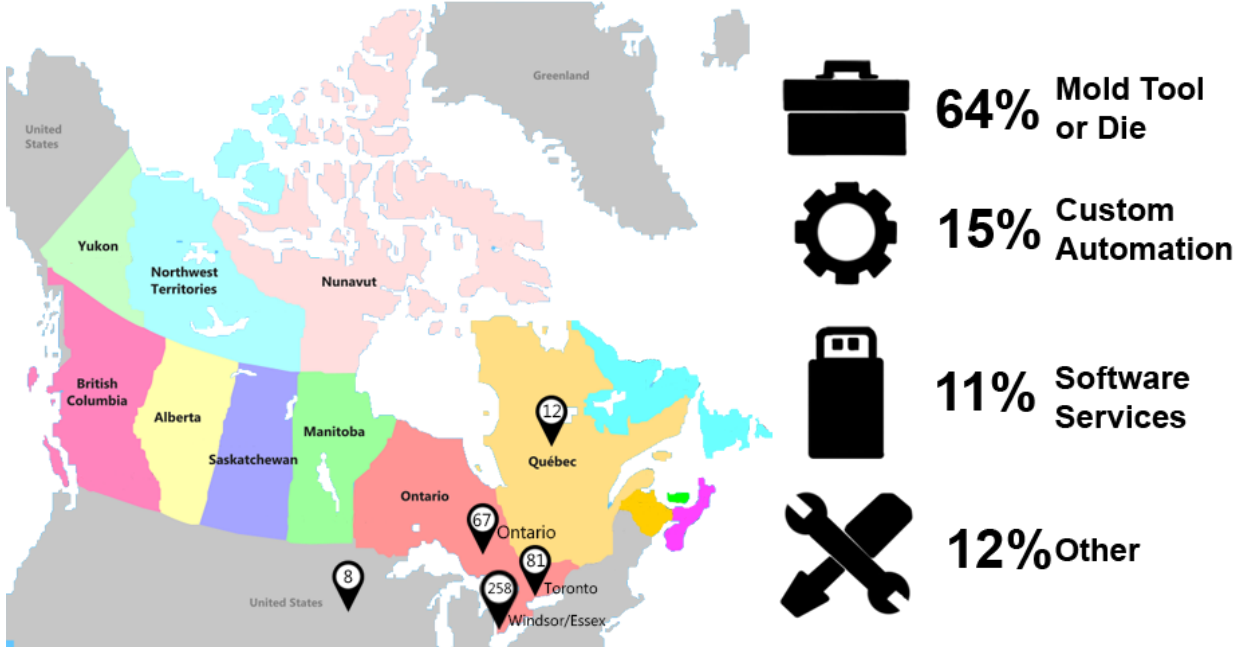


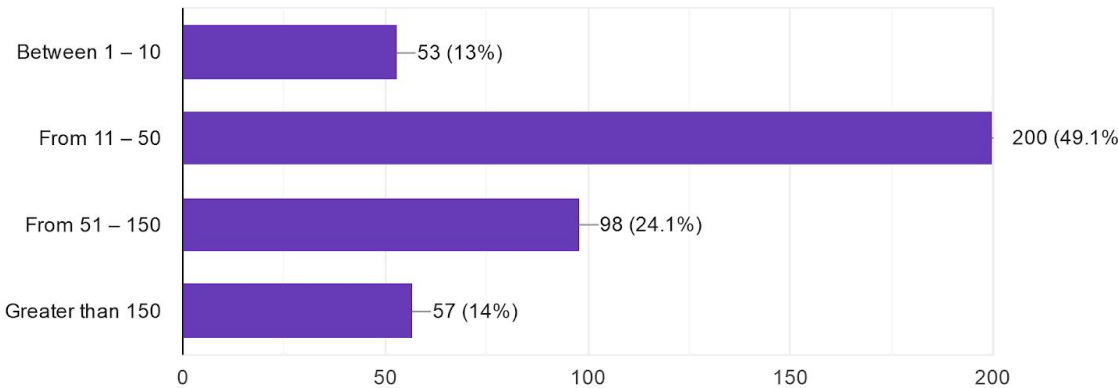
Survey conducted by CAMM and Automate Canada with a total of 54 responses for the Week Five survey (409 responses in total to date). This is lower than prior weeks, so some results and graphs must be considered in light of that.

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



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

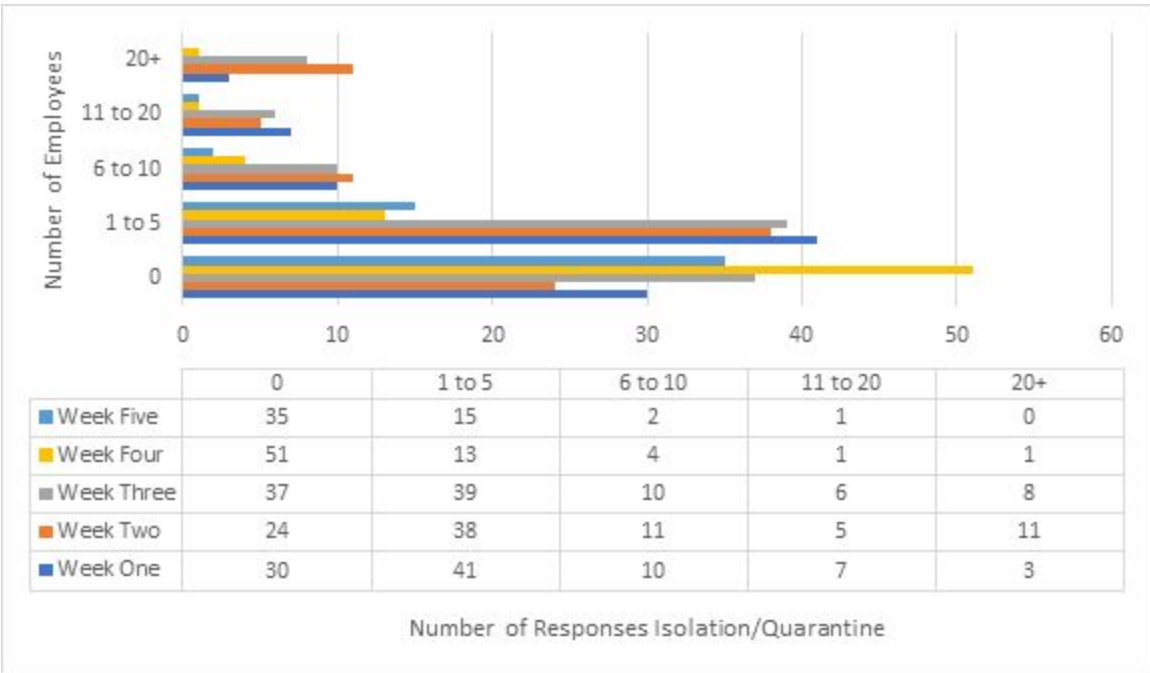
62% of our respondents are small companies, with between 1 - 50 employees.



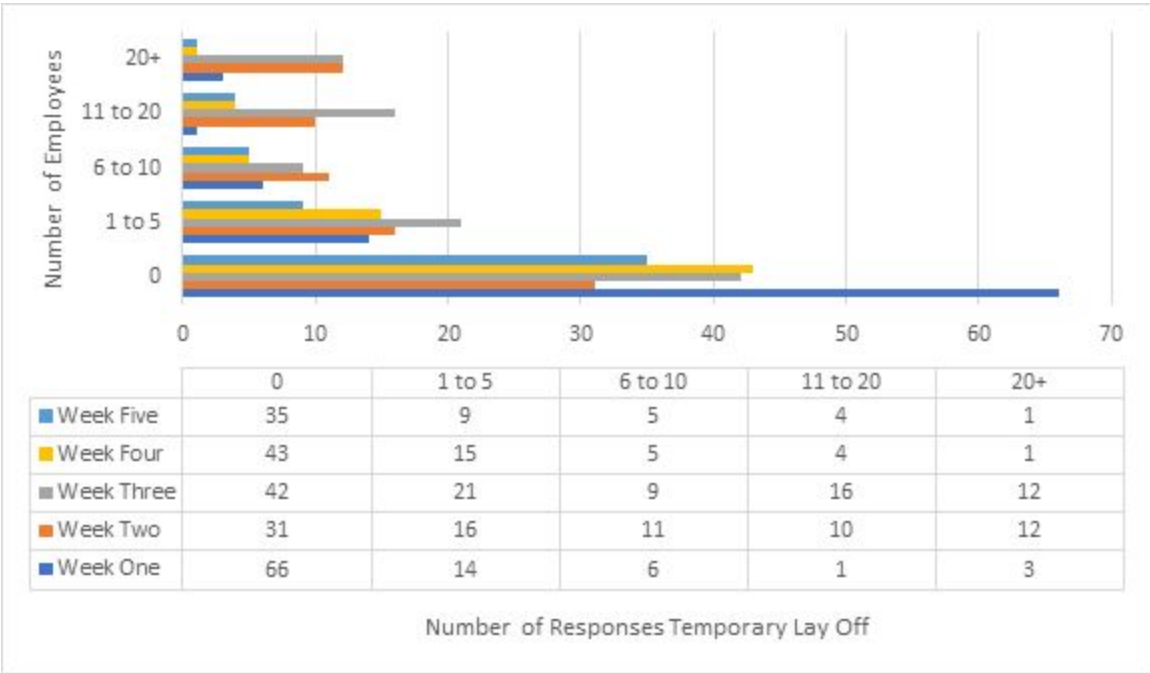
**Direct impact reported on the workforce:**

**Mandatory Isolation or Quarantine:** The number of employees out of the workplace due to isolation or quarantine dropped again this week - down to 58 in total (compared to 97 last week).

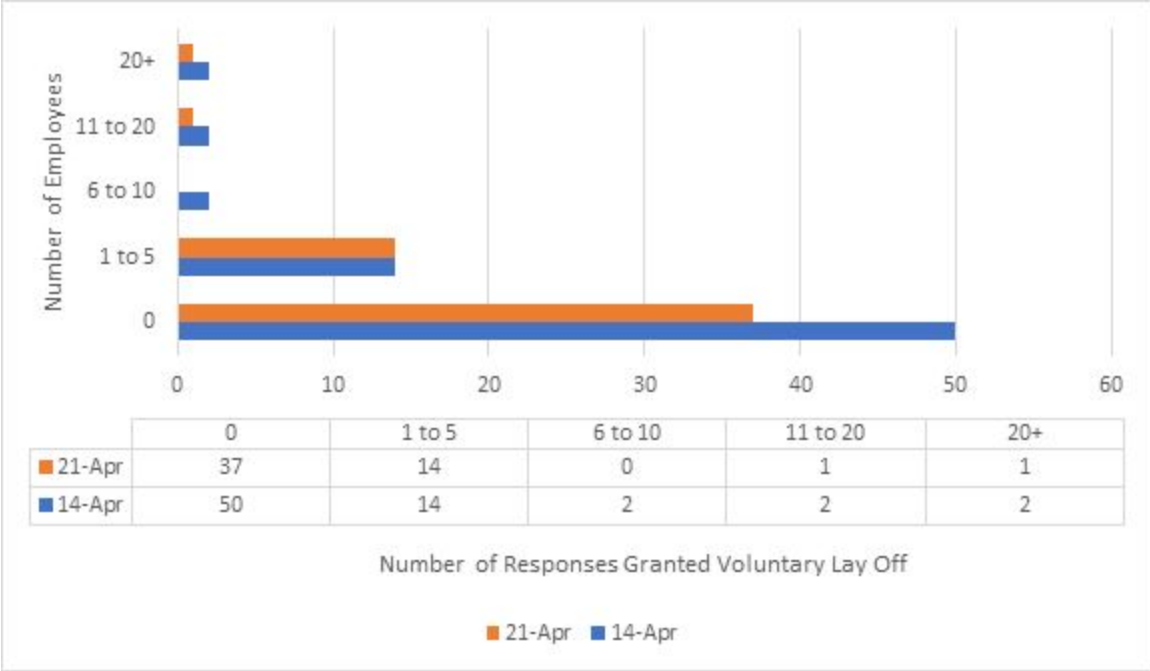
35 manufacturing workplaces reported having no employees on quarantine, down from 51 in week 4. For the first time, none of our larger workplaces reported having 20 or more employees off on quarantine.



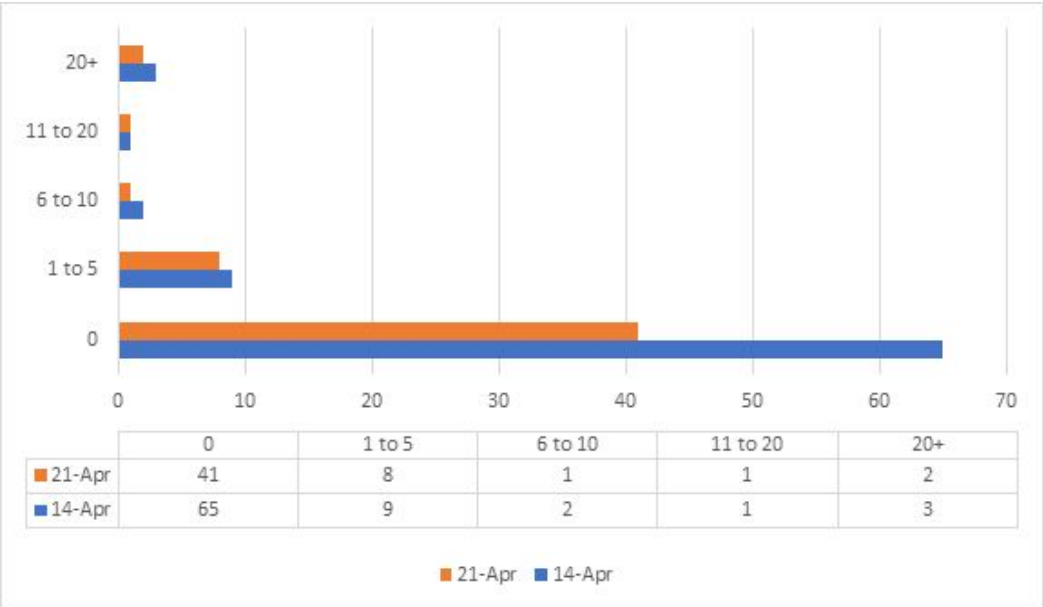
**Temporary Layoffs:** 35 workplaces, or 65% of our respondents, laid off no workers this week. In another positive trend, this increased from last week, where 46% of our respondents had not laid anyone off. The number of employees laid off also decreased this week, declining to a total of 143 employees laid off temporarily, compared to 197 in week 4. Even with fewer participants in this week’s survey, this still shows a sharp decline in temporary layoffs and demonstrates that employee counts have stabilized.



**How many employees were granted voluntary layoffs:** In total, 64 employees were reported as off on layoff at their request, about half of what the number was last week.

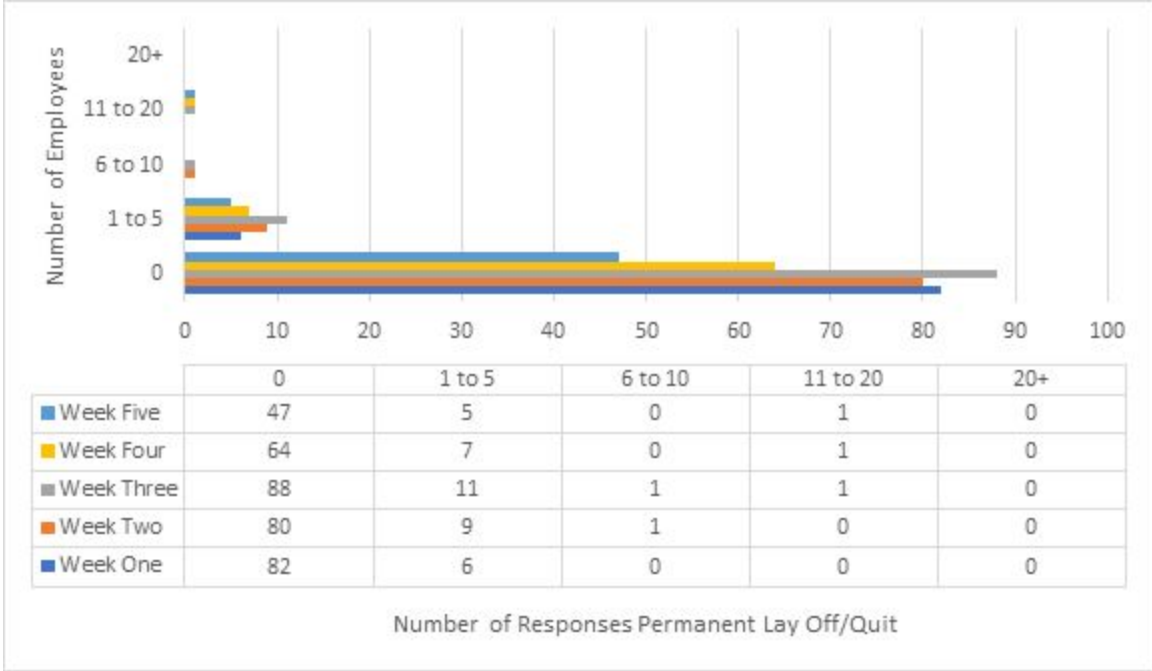


**What about employees who have received full or partial wages, but were not actively working?** In the past 7 days, there were a total of 395 “furloughed” employees, down from the 475 reported as furloughed last week.

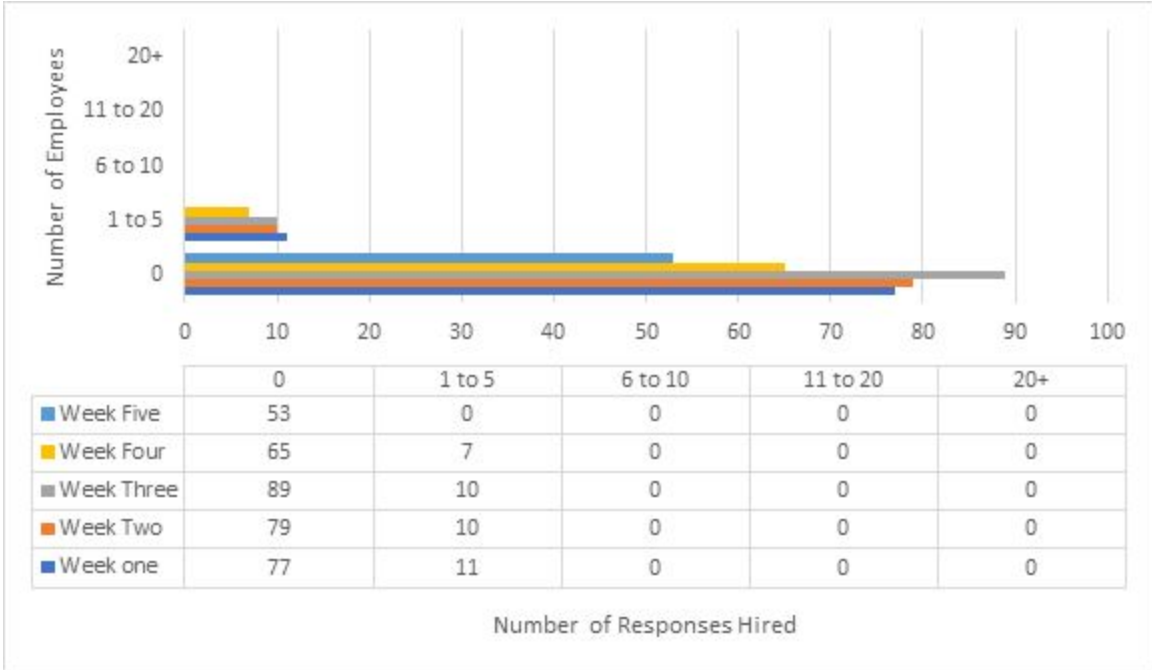


Manufacturing Sector Committee  
 Report to Windsor-Essex Regional Task Force

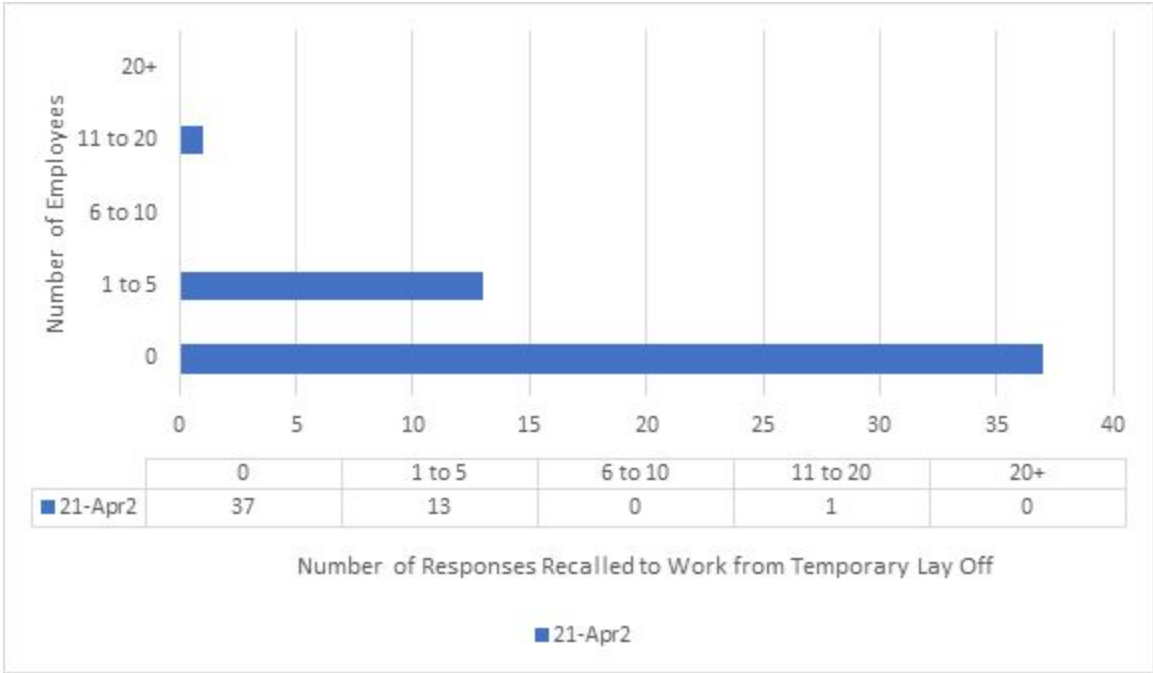
**Most workplaces are still not letting employees go permanently.** 29 employees were reported as permanently laid off in week 5, down from 32 the week prior. 87% of our respondents reported not letting anyone go permanently.



**This week shows no new hires.** This is the first time that 0 employees were hired in the past 7 days.

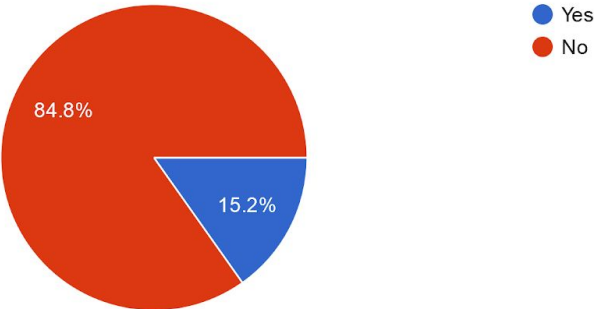


**We added a question to ask how many employees have been recalled in the prior week from temporary layoff.** And the good news is that they have started to recall employees - 43 to be exact. 32% of our respondents reported calling at least one employee back. We will continue to track this going forward.



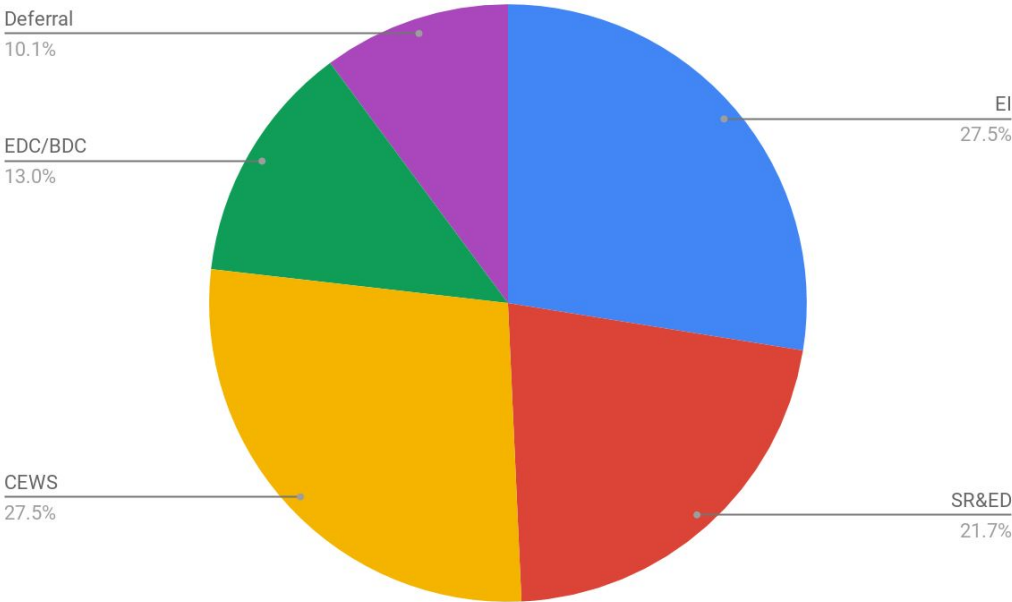
Manufacturing Sector Committee  
Report to Windsor-Essex Regional Task Force

**We asked how many workplaces are paying some kind of premium to their employees as an incentive to keep them actively working.** 15% have decided to offer some kind of premium, slightly less than what was reported last week.



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

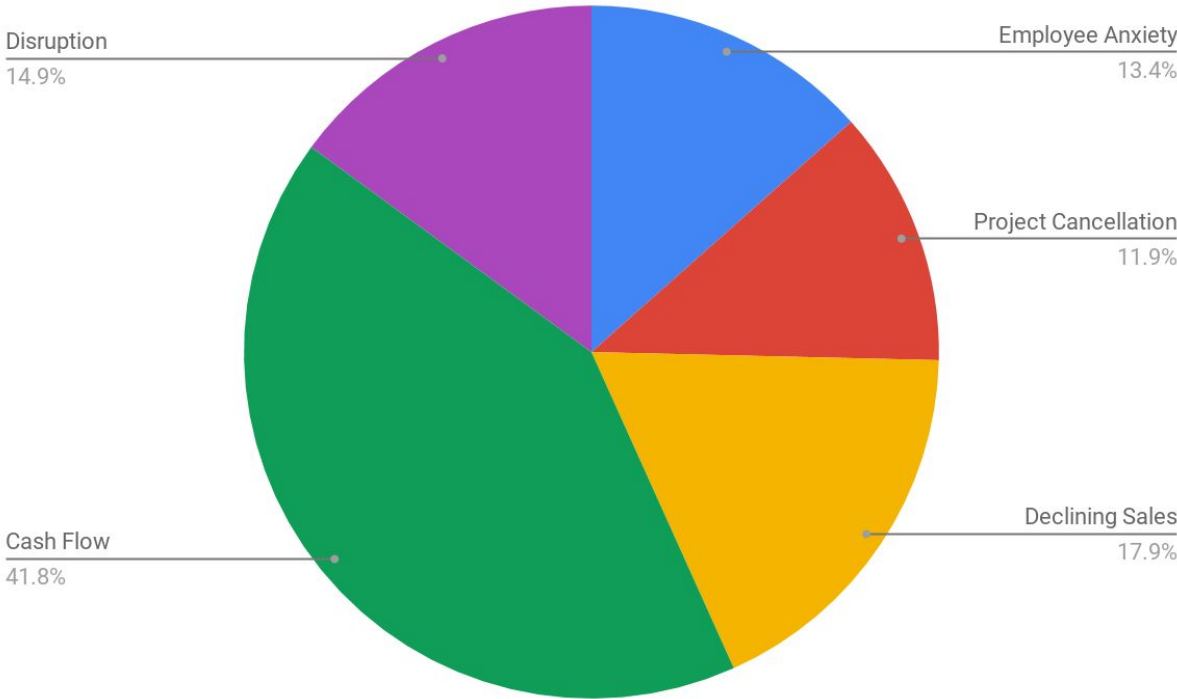
Manufacturers are continuing to take advantage of the Canada Emergency Wage Subsidy program, deferring remittance of taxes & duties and of products from EDC & BDC. The most commonly mentioned programs across each week, however, were still EI & SR&ED.





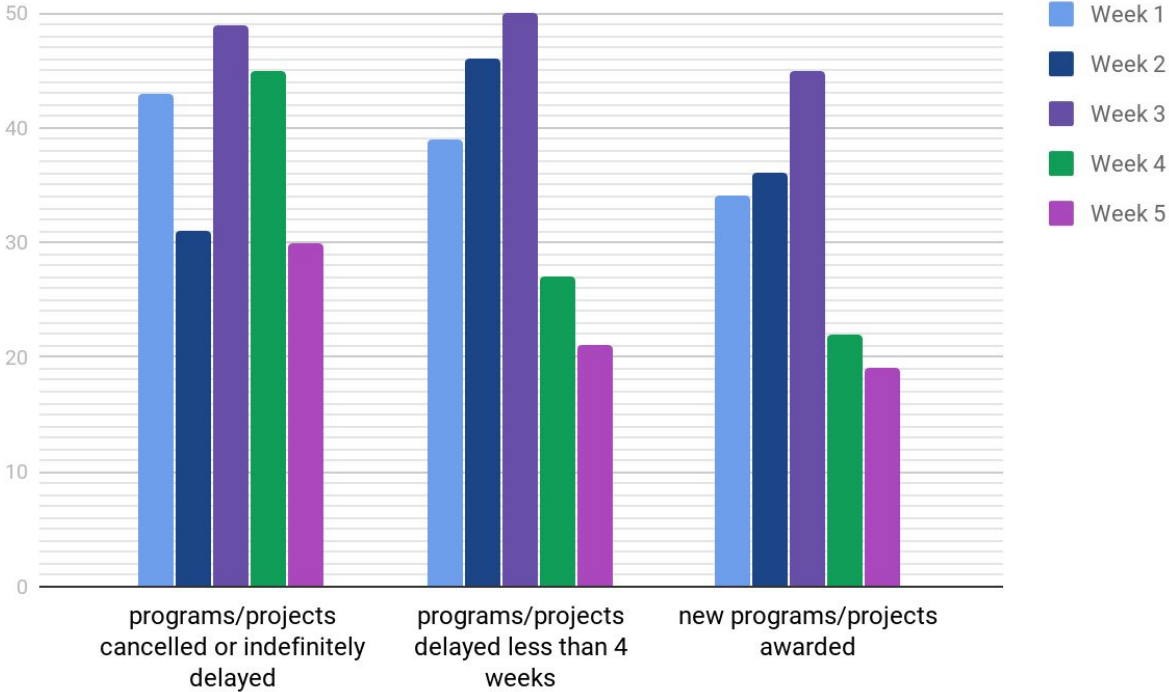
**Biggest Impact on Canadian Business to Date:**

There was a bit of a shift with respect to the largest impacts on our businesses reported this week. Cash flow shifted to the top of the list. While employee anxiety is still in the top 5, it's much lower in impact according to our respondents. Declining sales and "disruption" moved up. Project cancellations was also in the top 5. What could this mean? It is clear that our manufacturing sector is feeling the financial pain.



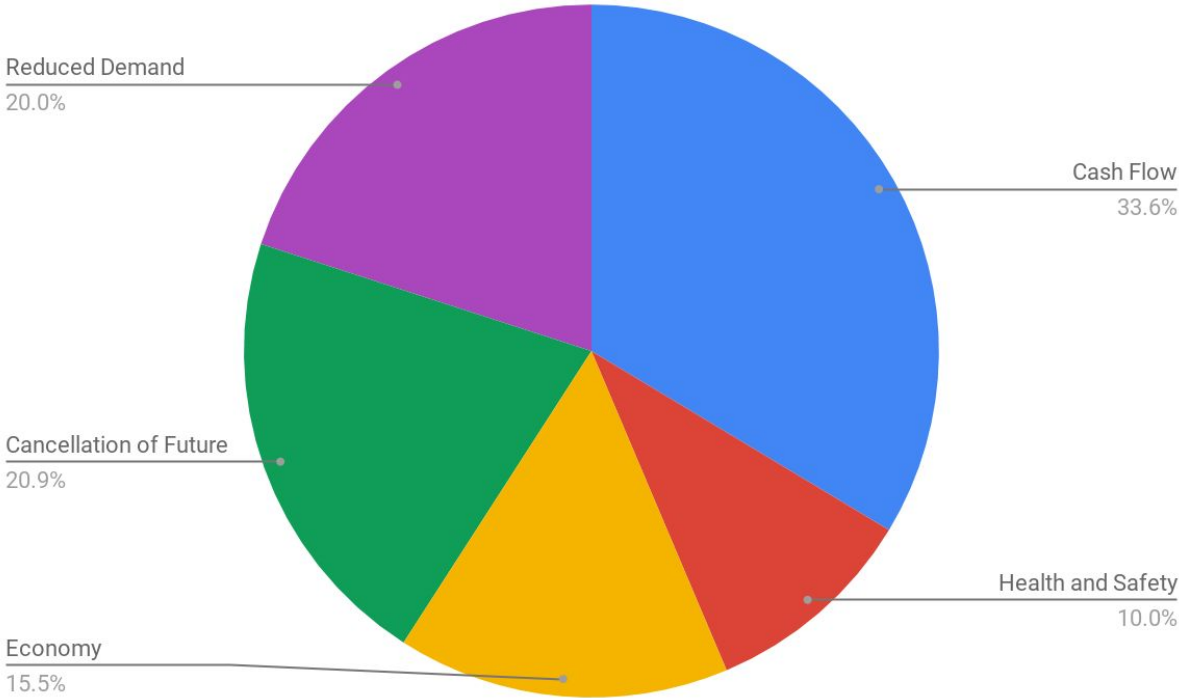
**Level of interruption/disruption to the sales pipeline**

It's difficult to compare these week over week as we had fewer respondents this week. Looking at the trend though, we're still seeing project cancellations dominating the list with continued slowing of delays and new programs compared to prior weeks.



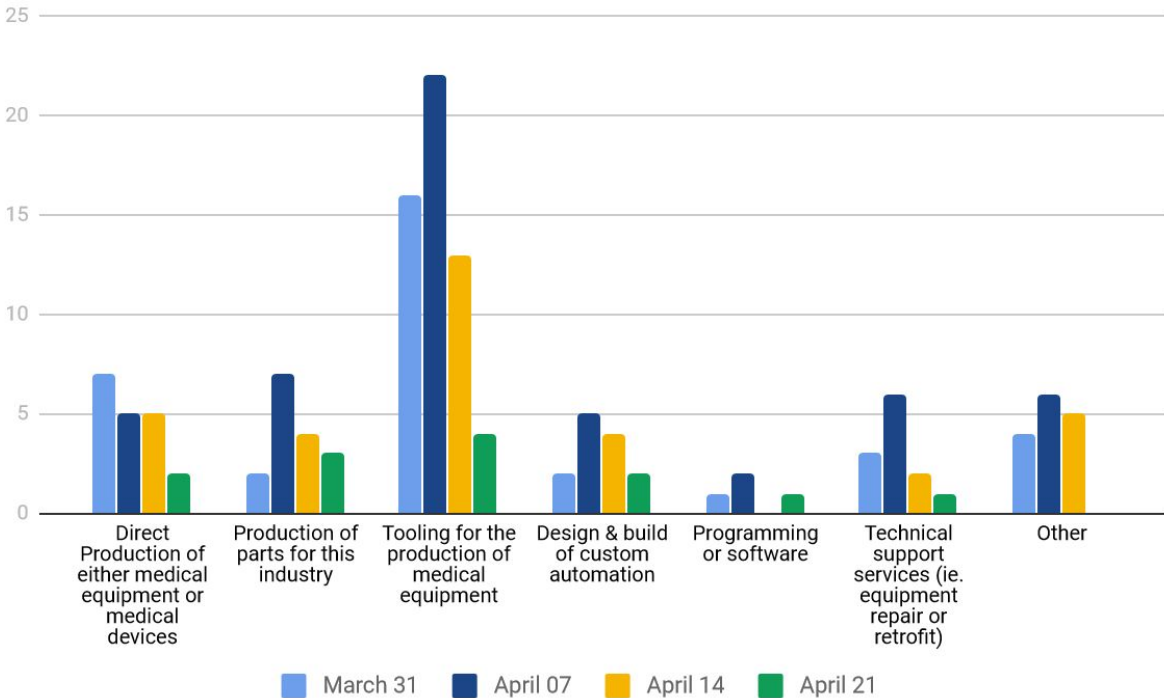
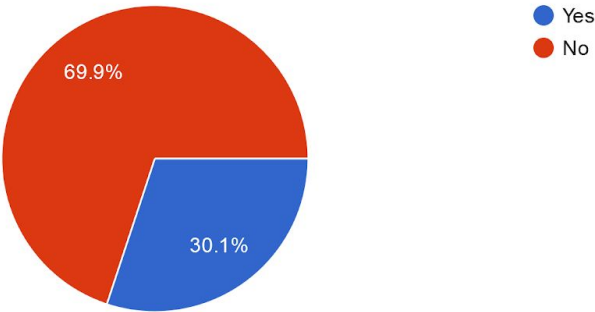
**Top Challenges in the coming month:What is manufacturing worried about for the future?**

For the past 5 weeks, we've seen that while cash flow worries are still top of mind, employee health keeps our manufacturers up at night, along with cancellation of projects and reduced demand. The general state of the economy was in the top five this week, while employee morale was bumped out of the top five. Was our webinar last week on Mental Health in the Workplace so effective that they were able to access resources to help bolster morale? While it was an informative and well attended webinar, the change this week is likely due to the stabilization of the situation in our workplaces, in particular with respect to the slowing of layoffs and improved health & safety practices.

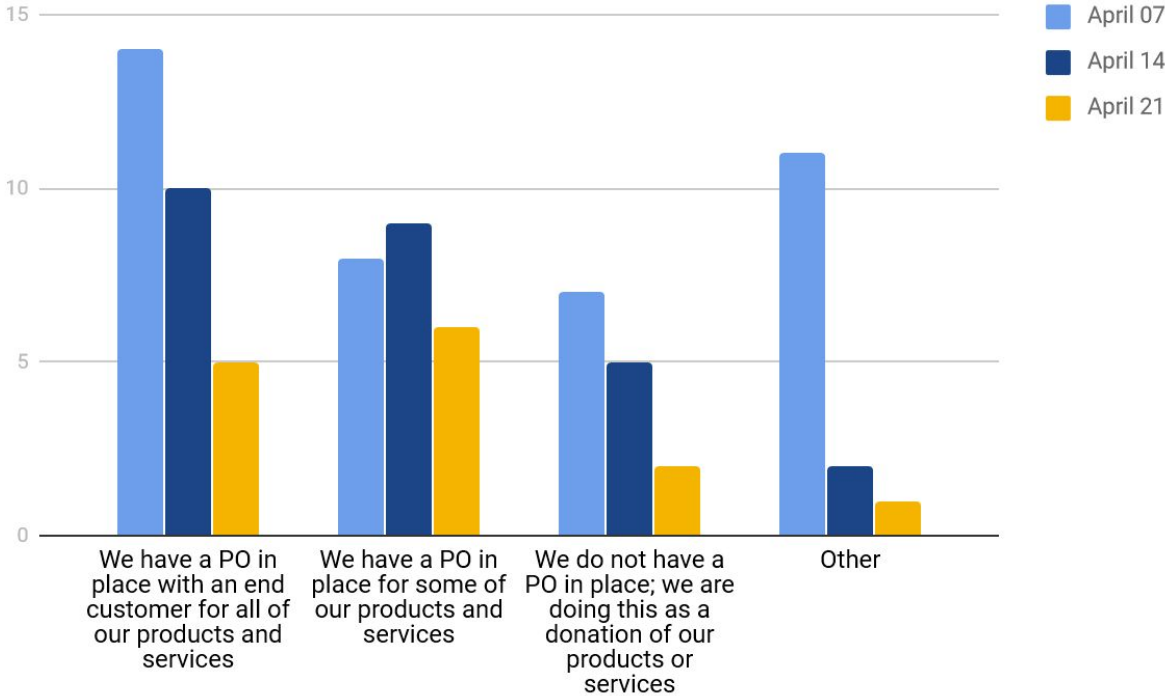


**Since last week, has your business expanded existing products and services to the medical sector, or added new products or services for the manufacturing of medical devices or medical equipment?**

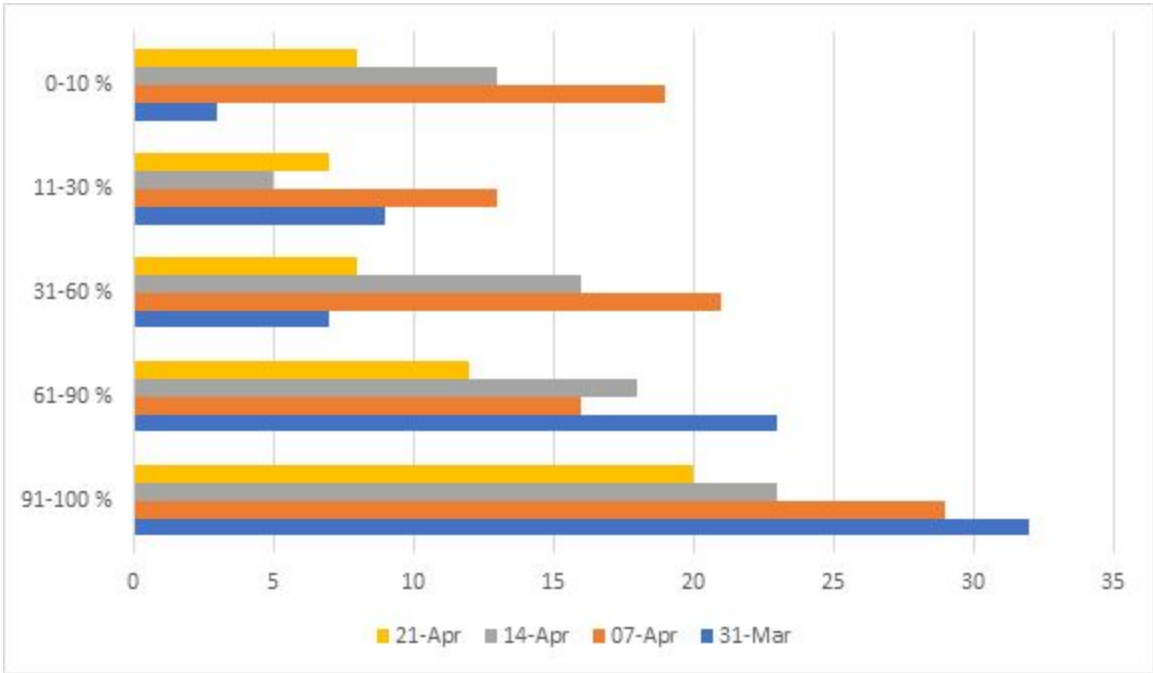
In week 1, 75% of our respondents said they were willing and able to supply products or services for medical equipment or devices. For each of our subsequent survey weeks, about one third of respondents have been able to answer the call for their services or products, mostly in the production of tooling for medical equipment manufacturing.



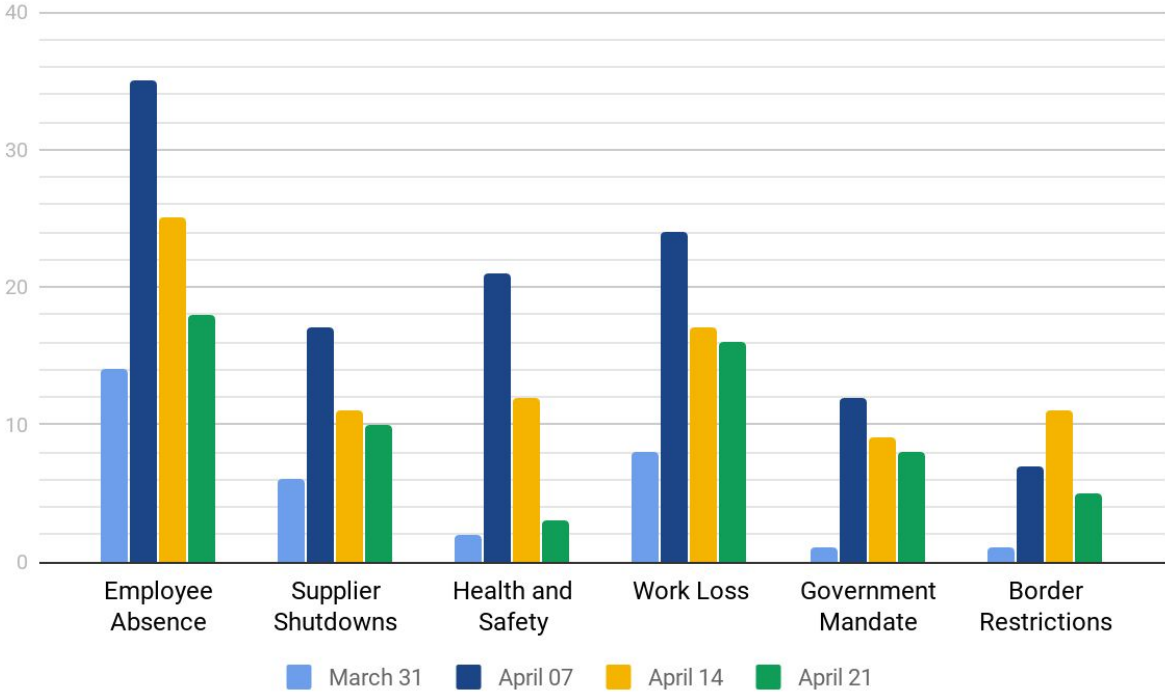
Knowing that we are in the process of pivoting to help address the need for medical equipment, we wanted to know how many companies are working under a PO and how many are donating their products and services. 4% of our respondents are donating their products or services, while 96% are working under a purchase order. This has shifted this week, with a big drop in the percentage of respondents who are doing the work for free, however this is likely driven by the reduced number of respondents.



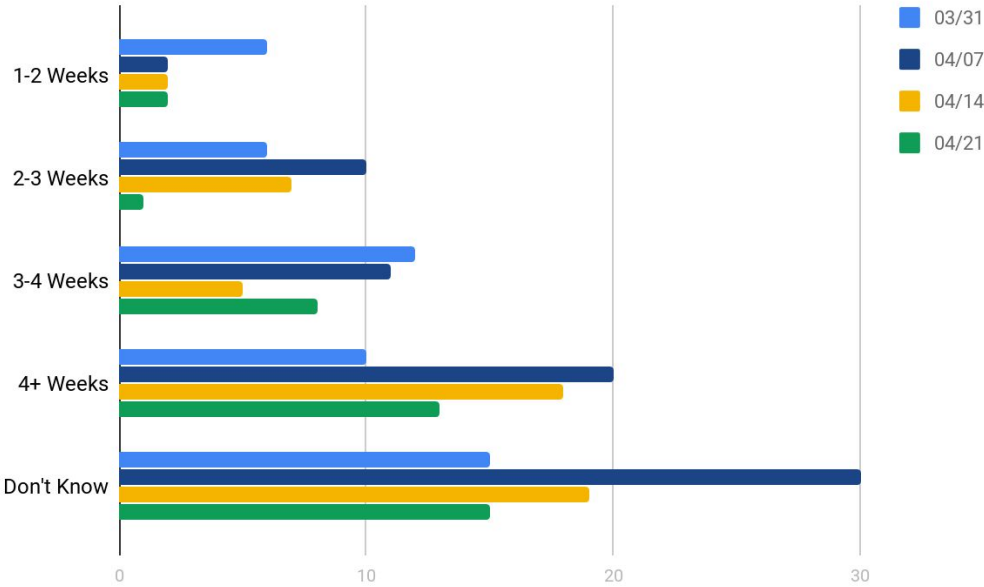
**We asked about the level of shutdown at our manufacturers.** Respondents were asked to indicate the percentage of operations they are currently at. In other words, 100% means they have had no reduction in operations; 0% means they are completely closed. The increases we've seen in workplace shutdowns have slowed - a positive development this week. 37% of our respondents are at over 90% of full operations (higher than last week's number of 30%). The number of workplaces that are completely (or almost completely) shut down remained fairly consistent this week at 15%.



**We asked why they've shut all or some of their operations down.** Shutdowns were due primarily to employee absences & loss of work. Health and safety concerns didn't factor as heavily this week as in prior weeks which suggests that workplaces have adopted effective health & safety practices.



**And how long do they think their shutdown will last?** It's clear from our most recent results that we're still feeling pessimistic about this situation. Most respondents either wouldn't commit to a date or feel that it is going to be at least 4 more weeks before they return to full operations.



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

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

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