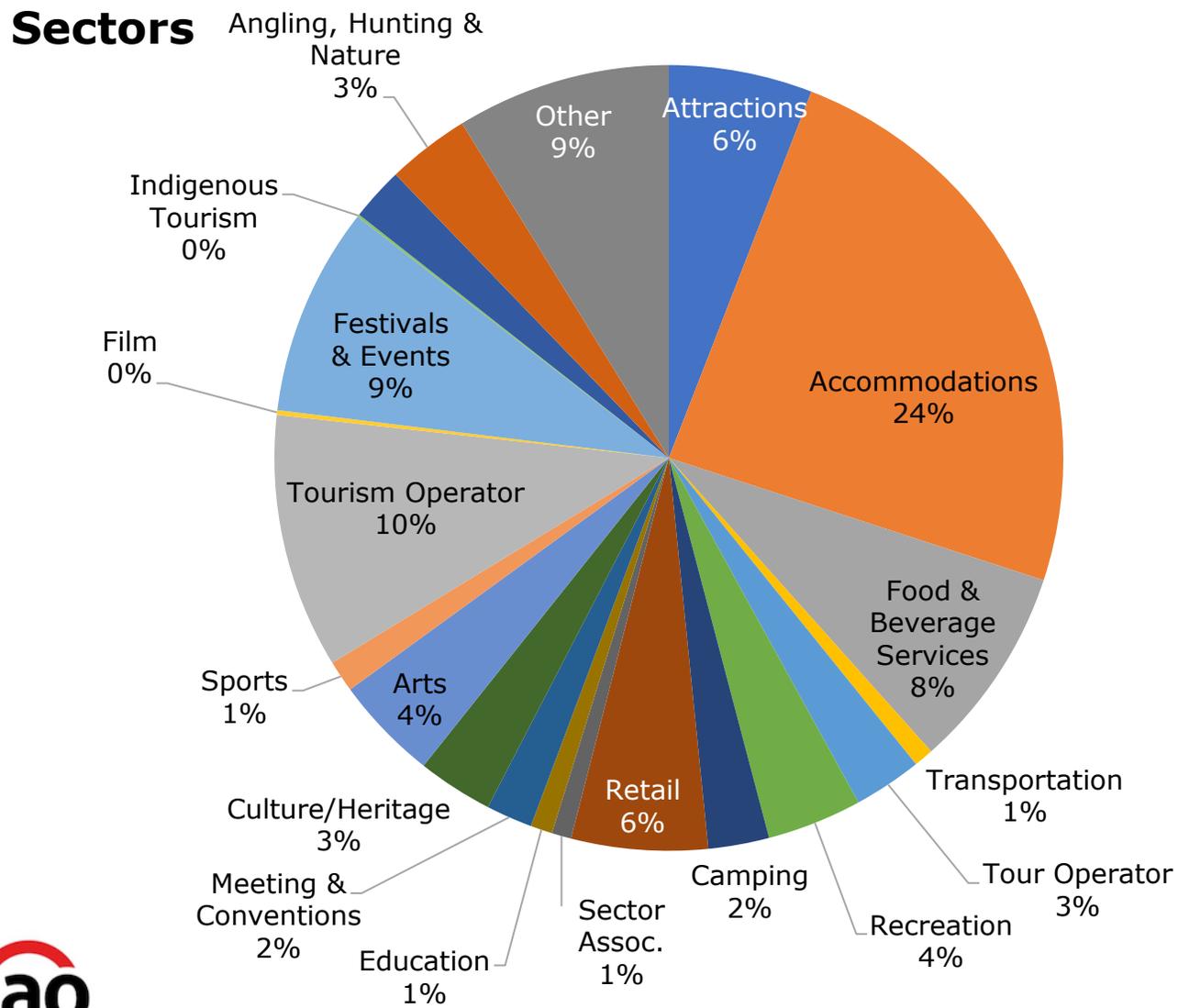




Ontario Regional Tourism Organizations
Covid-19 Survey 5 Results
May 13 – 19, 2020

Which sector do you operate in?

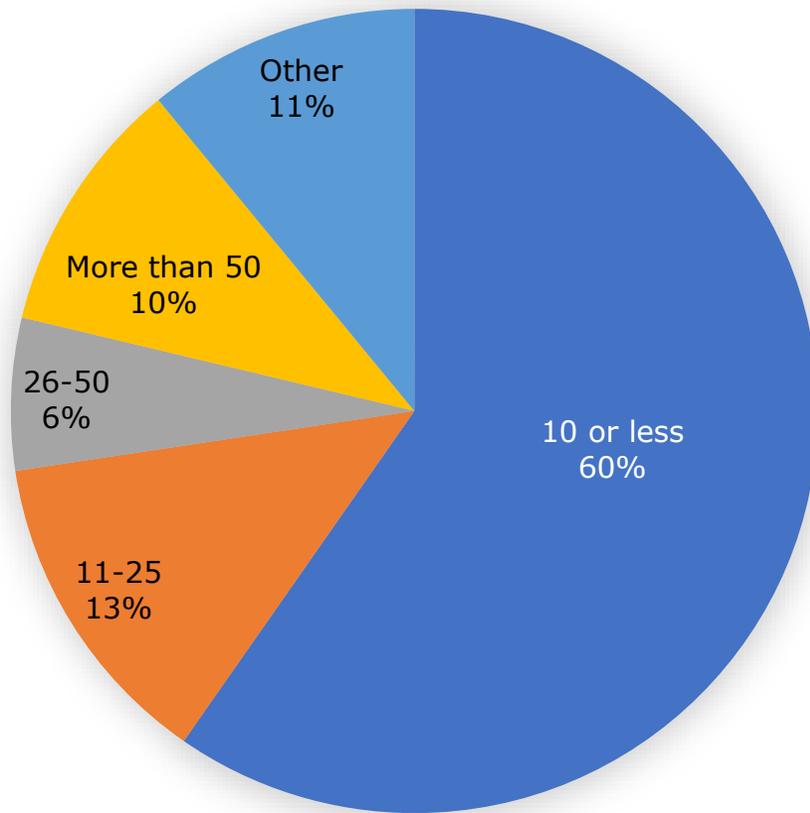
1,002 completed surveys



| Sectors | Value | % |
|---------------------------|-------|--------|
| Attractions | 59 | 5.89% |
| Accommodations | 242 | 24.15% |
| Food & Beverage Services | 84 | 8.38% |
| Transportation | 8 | 0.80% |
| Tour Operator | 28 | 2.79% |
| Recreation | 39 | 3.89% |
| Camping | 25 | 2.50% |
| Retail | 56 | 5.59% |
| Sector Association | 8 | 0.80% |
| Education | 9 | 0.90% |
| Meeting & Conventions | 19 | 1.90% |
| Culture/Heritage | 31 | 3.09% |
| Arts | 43 | 4.29% |
| Sport | 13 | 1.30% |
| Tourism Operator | 105 | 10.48% |
| Film | 2 | 0.20% |
| Festivals and Events | 86 | 8.58% |
| Indigenous Tourism | 1 | 0.10% |
| DMO | 22 | 2.20% |
| Angling, Hunting & Nature | 34 | 3.39% |
| Other | 88 | 8.78% |

How many employees does your business have?

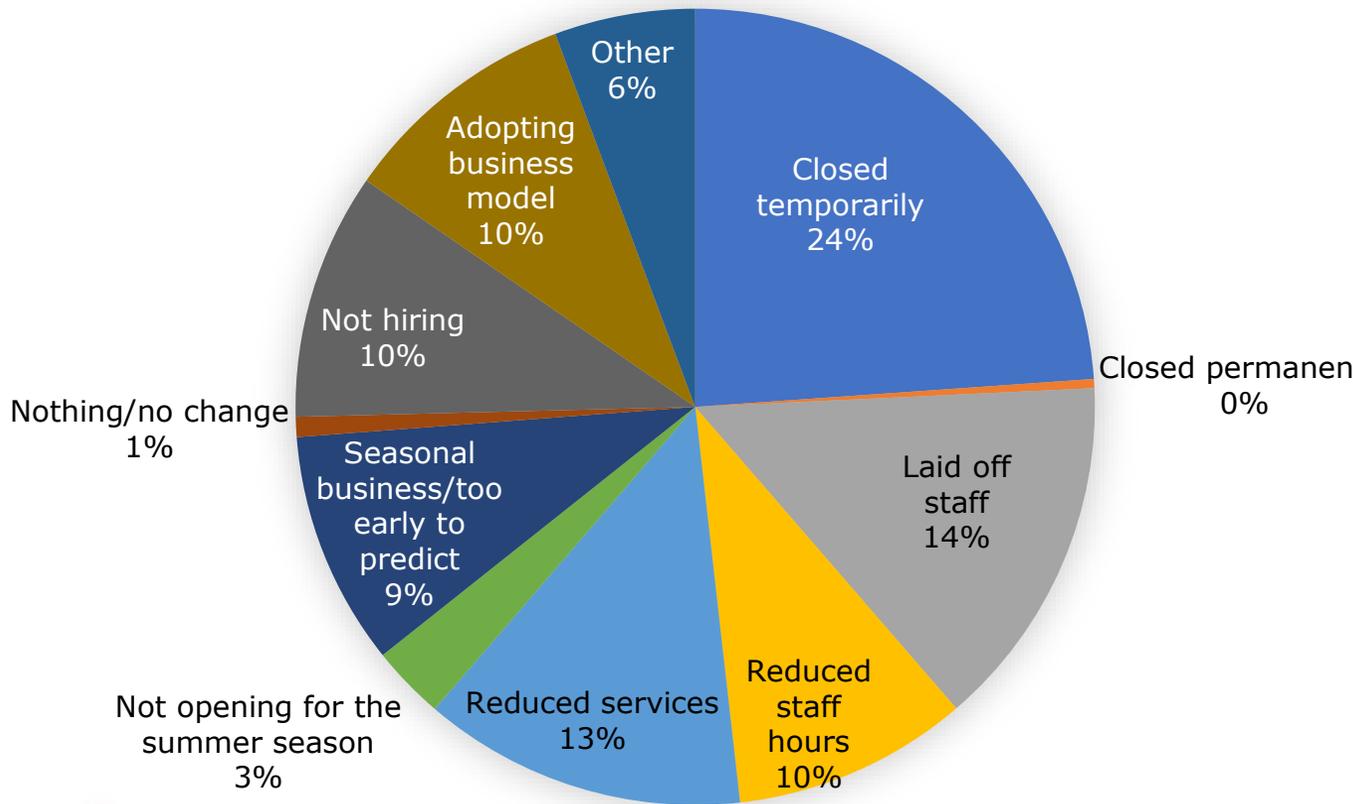
Number of Employees



| Number of Employees | Value | % |
|---------------------|-------|--------|
| 10 or less | 595 | 59.68% |
| 11-26 | 129 | 12.94% |
| 26-50 | 61 | 6.12% |
| More than 50 | 103 | 10.33% |
| Other | 109 | 10.93% |

What actions have you currently taken as a result of COVID-19? Select all that apply.

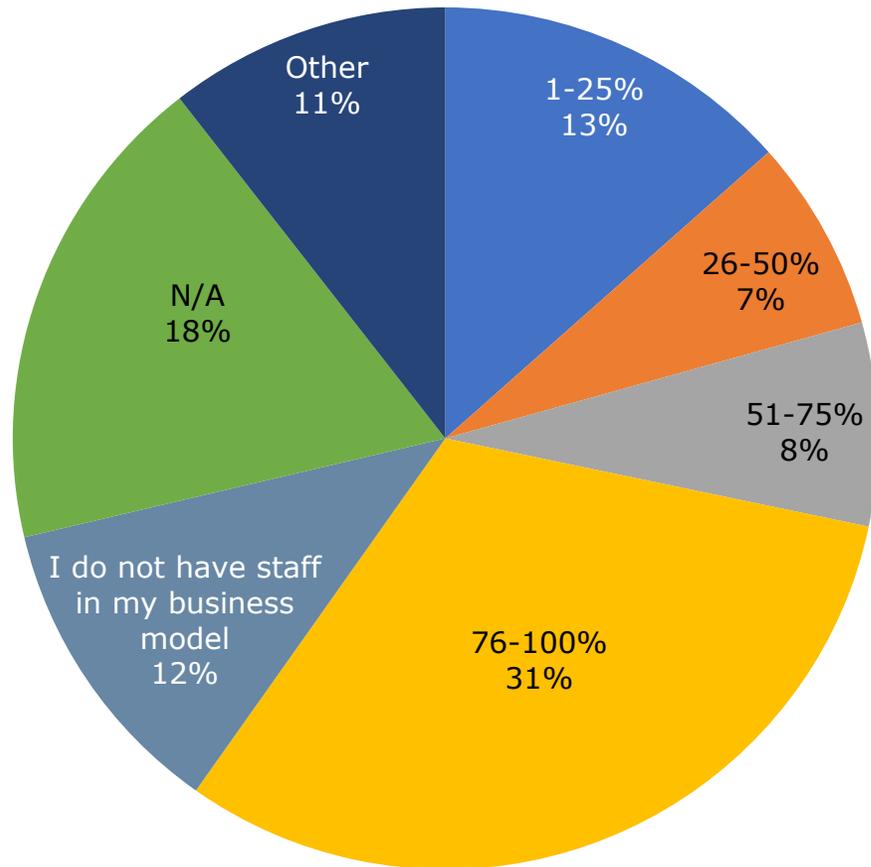
Actions currently taken as a result of COVID-19



| Actions taken as a result of COVID-19 Select all that apply | Value | % | % of Total Surveys |
|--|-------|--------|--------------------|
| Closed Temporarily | 646 | 23.88% | 64.47% |
| Closed Permanently | 10 | 0.37% | 1.00% |
| Laid off staff | 390 | 14.42% | 38.92% |
| Reduced staff hours | 258 | 9.54% | 25.75% |
| Reduced services | 354 | 13.09% | 35.33% |
| Not opening for the summer season | 81 | 2.99% | 8.08% |
| Seasonal business/too early to predict | 257 | 9.50% | 25.65% |
| Nothing/no change | 22 | 0.81% | 2.20% |
| Not hiring | 271 | 10.02% | 27.05% |
| Adotping business model | 262 | 9.69% | 26.15% |
| Other | 154 | 5.69% | 15.37% |

Please indicate what percentage of your employees are being laid off

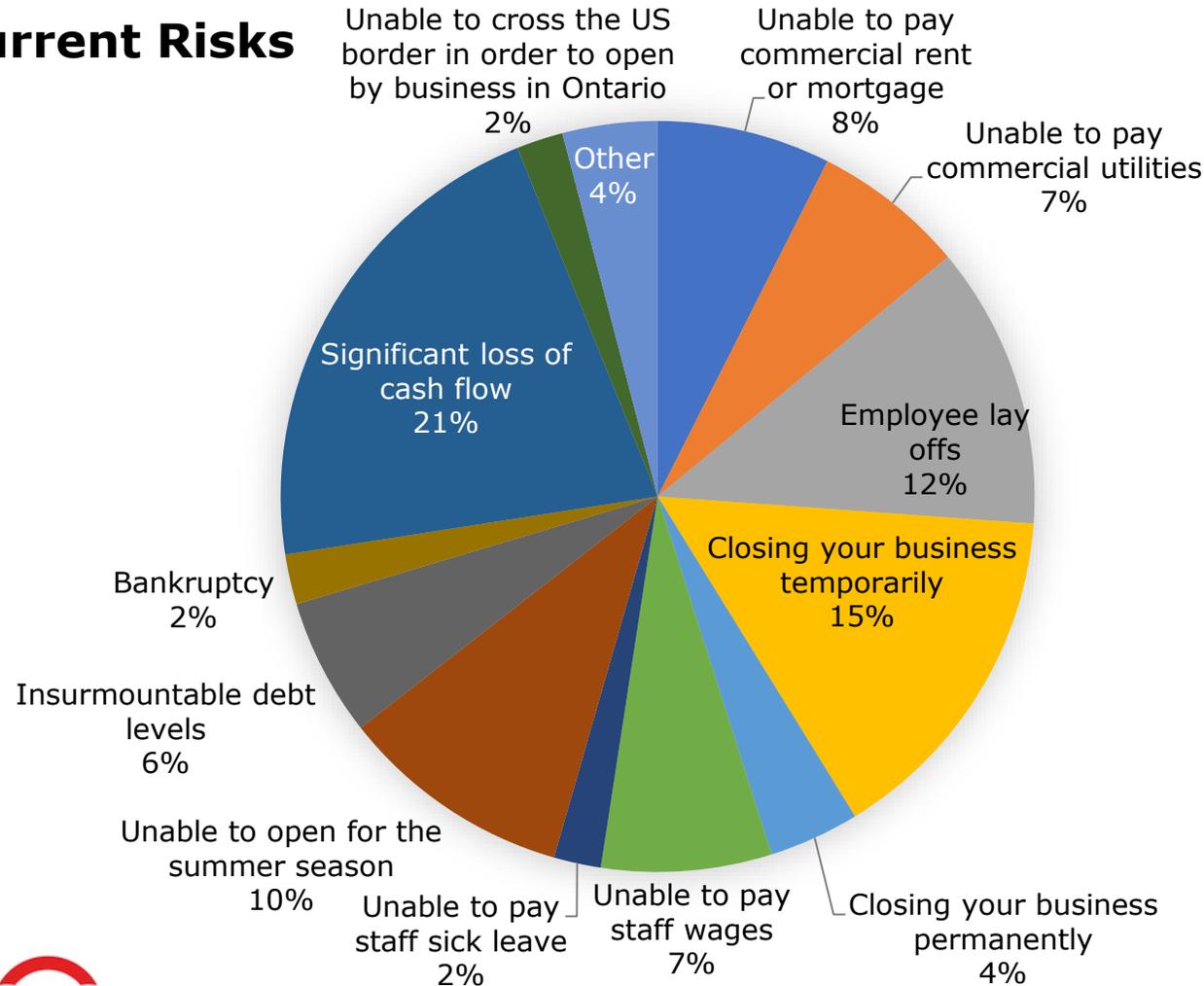
% of Employees Laid Off



| Percentage of employees laid off | Value | % |
|--|-------|--------|
| 1-25% | 134 | 13.44% |
| 26-50% | 72 | 7.22% |
| 51-75% | 76 | 7.62% |
| 76-100% | 314 | 31.49% |
| I do not have staff in my business model | 115 | 11.53% |
| N/A | 181 | 18.15% |
| Other | 105 | 10.53% |

Please indicate the risk your tourism business is facing presently.
Select all that apply.

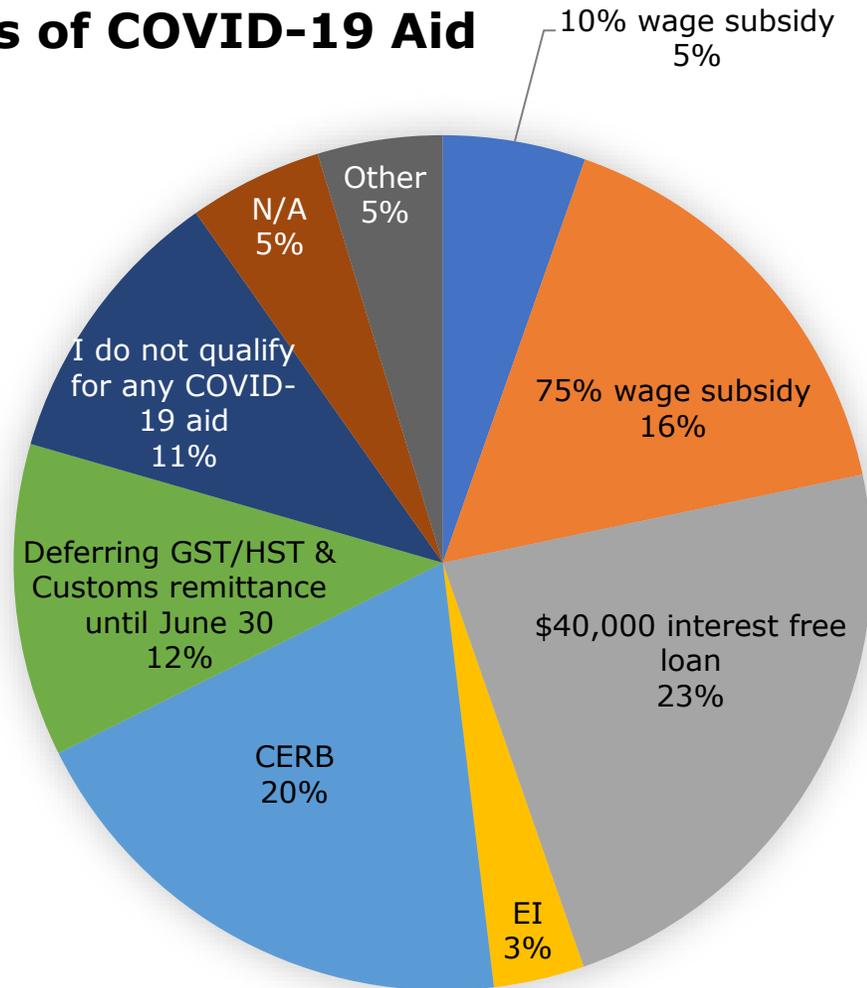
Current Risks



| Current Risks Select all that apply | Value | % | % of Total Surveys |
|---|-------|--------|--------------------|
| Can't pay commercial rent/mortgage | 276 | 7.44% | 27.54% |
| Can't pay commercial utilities | 243 | 6.55% | 24.25% |
| Employee Layoffs | 451 | 12.16% | 45.01% |
| Closing business temporarily | 559 | 15.07% | 55.79% |
| Closing business permanently | 144 | 3.88% | 14.37% |
| Unable to pay wages | 271 | 7.31% | 27.05% |
| Unable to pay sick leave | 75 | 2.02% | 7.49% |
| Unable to open for the summer | 371 | 10.00% | 37.03% |
| Insurmountable debt | 220 | 5.93% | 21.96% |
| Bankruptcy | 80 | 2.16% | 7.98% |
| Significant loss of cash flow | 794 | 21.41% | 79.24% |
| Unable to cross the US border in order to open by business in Ontario | 74 | 2.00% | 7.39% |
| Other | 151 | 4.07% | 15.07% |

Please indicate which types of COVID-19 related aid you have applied for. Select all that apply.

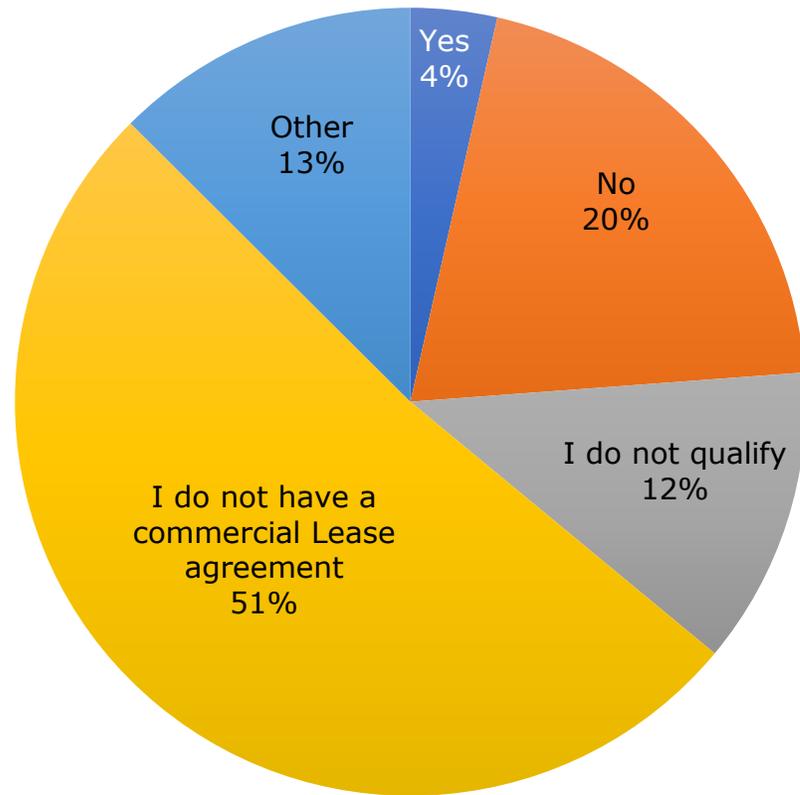
Which Types of COVID-19 Aid



| Types of COVID-19 Aid Select all that apply | Value | % | % of Total Surveys |
|--|-------|--------|--------------------|
| 10% wage subsidy | 96 | 5.38% | 9.58% |
| 75% wage subsidy | 291 | 16.31% | 29.04% |
| \$40k interest free loan | 410 | 22.98% | 40.92% |
| Employment insurance (EI) | 61 | 3.42% | 6.09% |
| Canada Emergency Response Benefit (CERB) | 349 | 19.56% | 34.83% |
| GST/HST/Customs Deferral | 211 | 11.83% | 21.06% |
| I did not qualify for any aid | 192 | 10.76% | 19.16% |
| N/A | 90 | 5.04% | 8.98% |
| Other | 84 | 4.71% | 8.38% |

Has your Landlord applied for the Ontario-Canada Emergency Commercial Rent Assistance (OCERCA) program?

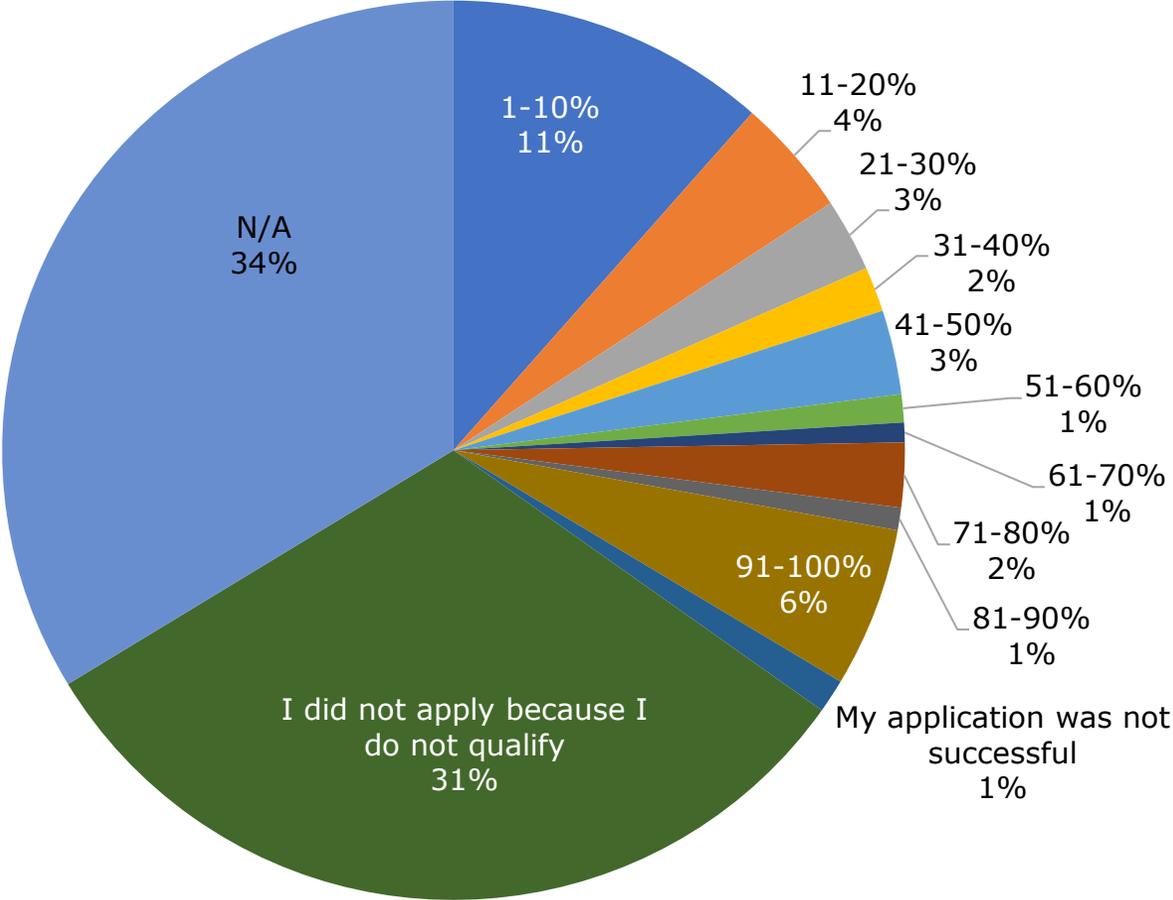
OCERCA Program



| Has your Landlord applied for OCERCA | Value | % |
|--|-------|--------|
| Yes | 35 | 3.53% |
| No | 201 | 20.28% |
| I do not qualify | 121 | 12.21% |
| I do not have a commercial lease agreement | 510 | 51.46% |
| Other | 124 | 12.51% |

Please indicate what percentage of your workforce you were able to sustain with the Canadian Emergency Wage Subsidy (CEWS)

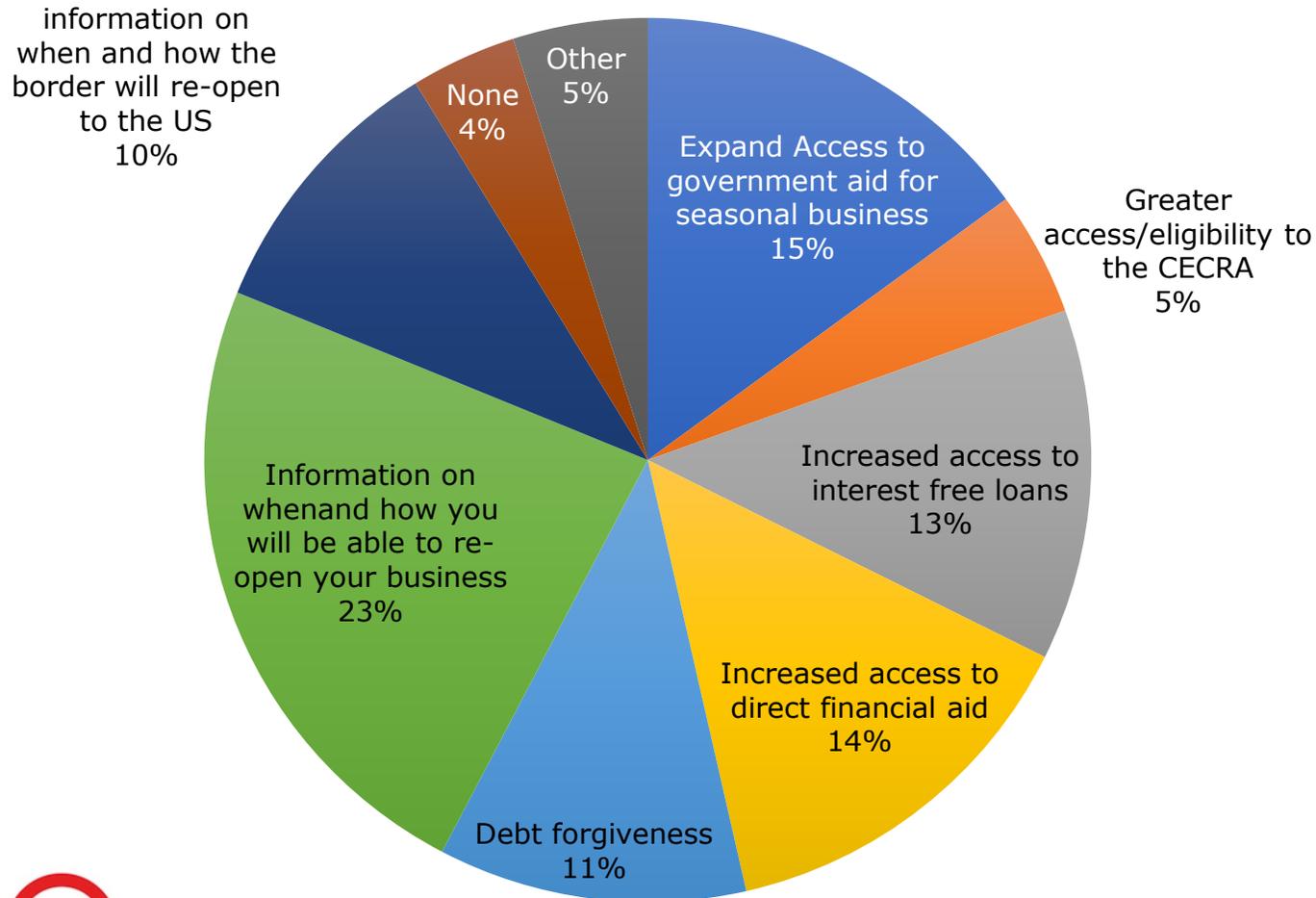
CEWS



| Percentage of your workforce you were able to sustain with CEWS | Value | % |
|---|-------|--------|
| 1-10% | 114 | 11.50% |
| 11-20% | 42 | 4.24% |
| 21-30% | 26 | 2.62% |
| 31-40% | 16 | 1.61% |
| 41-50% | 30 | 3.03% |
| 51-60% | 10 | 1.01% |
| 61-70% | 7 | 0.71% |
| 71-80% | 23 | 2.32% |
| 81-90% | 8 | 0.81% |
| 91-100% | 57 | 5.75% |
| My application was not successful | 12 | 1.21% |
| I did not apply because I do not qualify | 312 | 31.48% |
| N/A | 334 | 33.70% |

What other forms of aid/resources do you require during COVID-19? Select all that apply.

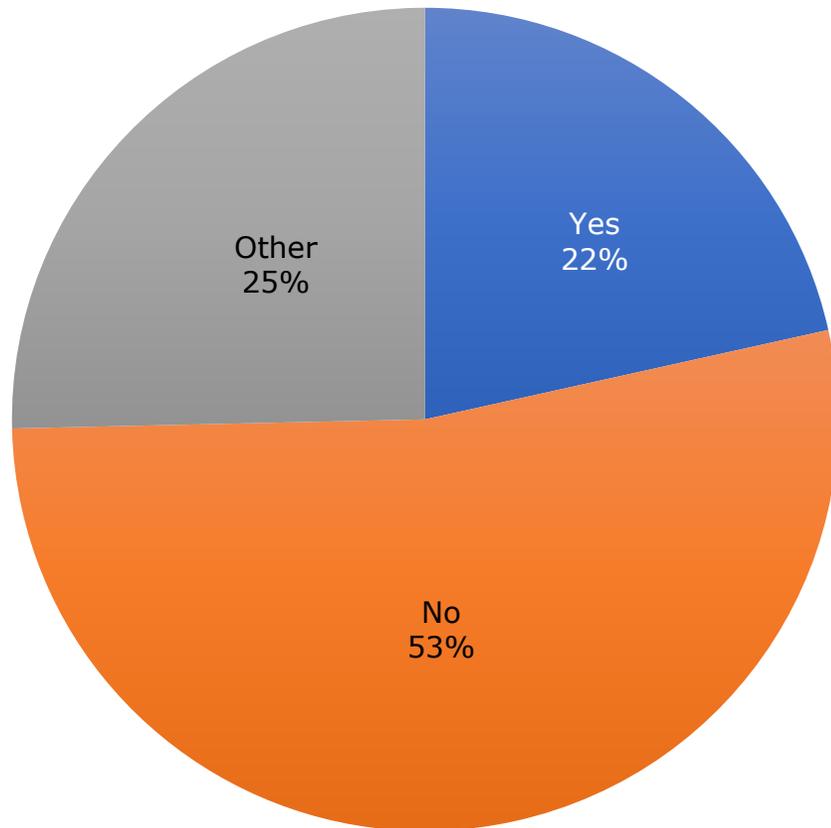
Other forms of aid



| Other forms of aid/resources required Select all that apply | Value | % | % of Total Surveys |
|---|-------|--------|--------------------|
| Expanded Access to government aid for seasonal businesses | 411 | 14.96% | 41.02% |
| Greater access/eligibility to the Canadian Emergency Commercial Rent Assistance | 125 | 4.55% | 12.48% |
| Increased access to interest free loans | 353 | 12.85% | 35.23% |
| Increased access to direct financial aid | 387 | 14.08% | 38.62% |
| Debt forgiveness | 309 | 11.24% | 30.84% |
| Information on when and how you will be able to re-open your business | 646 | 23.51% | 64.47% |
| Information on when and how the border will re-open to the US | 276 | 10.04% | 27.54% |
| None | 106 | 3.86% | 10.58% |
| Other | 135 | 4.91% | 13.47% |

Is the current COVID-19 Government aid sufficient to ensure that your tourism operation will remain viable and ready to open when the restrictions are lifted?

Government aid



| Is the Government aid enough | Value | % |
|------------------------------|-------|--------|
| Yes | 213 | 21.52% |
| No | 526 | 53.13% |
| Other | 251 | 25.35% |