COVID-19 RECOVERY RESEARCH NAVIGATING THE **ROAD TO SUCCESS: HOW TO SUPPORT WOMEN ENTREPRENEURS**

Integrated Report

February 2021

WEOC Women's Enterprise Organizations of Canada





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Notes to Readers:

Results have been weighted to reflect the national population of self-employed women based on the 2016 Census.

Be cautious when interpreting results where the base size is small. Data should be interpreted qualitatively, and directionally in nature.

Unless otherwise stated, data in is report are in percentages.

On charts, V arrows indicate where data is below and above average.

In tables, red / blue font indicate where data is significantly above or below other cells



FOREWORD

BACKGROUND

Women's Enterprise Organizations of Canada (WEOC) is an association of organizations that work directly with women entrepreneurs. Members deliver a variety of services to support their clients, including business advising, training, networking, mentoring and loans.

WEOC's goal is to provide its members with information, data, learning opportunities and best practices, so that they have the tools and resources to support their clients.

The onset of the COVID-19 pandemic in early 2020 has dramatically affected businesses in Canada. With a constantly evolving environment, Canadians' behaviour and expectations are also in state of flux. The objective of the survey was to learn more about women entrepreneurs in general, and the impact of the pandemic on their business. Insights stemming from the research will be useful for participants in the women's enterprise eco-system, to evaluate existing programs and identify gaps in order to contribute to the overall success of women entrepreneurs across the country.

WEOC partnered with Environics Research, an independent market research consultancy, to undertake this research project.

This report outlines the findings of Phase 1, integrating insights from qualitative and quantitative research. Phase 2 of the research will be conducted in Spring 2021, to understand the changing landscape.

Yes, We're

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OBJECTIVES

- Better understand the challenges that women entrepreneurs across Canada face, in general and as a result of COVID-19.
- Identify the changing needs of women entrepreneurs, and resources that would contribute to their success.
- Determine awareness levels and access to existing programs for women entrepreneurs.
- Capture data that illustrate the situation for women entrepreneurs in Canada; and enable relevant comparisons among regions, industries and a variety of business sizes.
- Inform the development of relevant tools that support women entrepreneurs.
- Understand the longer-term impacts of, and the rate of recovery from, the COVID-19 pandemic for women-owned businesses.



METHODOLOGY

- In this preliminary exercise, we spoke with a diverse mix of women entrepreneurs, drawn from various industries across Canada.
- This report outlines the findings of Phase 1, integrating insights from qualitative and quantitative research.
 - Qualitative Research: n=20 in-depth interviews with Canadian women entrepreneurs
 - Quantitative Research: 25-minute, online survey with n=410 self-identified Canadian women entrepreneurs
- Participants were recruited from a variety of sources, including WEOC member networks, panels and social media.
- The results reflect a preliminary look into the current experiences of women entrepreneurs in Canada. A follow-up survey, to be conducted in Spring 2021, will seek to further explore women entrepreneurs' experience and ecosystem, deepening these insights, as well as track the ongoing impacts of the COVID-19 pandemic on women entrepreneurs.
- Results at the total, national level are reflective of women entrepreneurs. In those regions with smaller sample sizes, findings should be interpreted qualitatively and used directionally.





KEY INSIGHTS

1. Women entrepreneurs have been deeply impacted by COVID-19 across all facets of their lives: business, family and home life, and physical and mental well-being.

- Uncertainty continues | Nine months into the pandemic, the situation for women entrepreneurs remains uncertain. With the advancing second wave, there were no consistent indicators that recovery was on the horizon. One-third of respondents state they are worse off compared to three months earlier; one-third indicate that their situation is neither worse nor better; and one-third say their situation is improving.
- Negative impacts felt | Three-quarters indicate that their business has been negatively impacted in some way; with 6 in 10 expecting financial losses this year.
- Shouldering multiple burdens | Many women entrepreneurs feel that they're shouldering the burden of the pandemic: juggling work, family and household obligations in an uncertain situation. This extremely challenging time has taken a toll on their physical and mental health; 8 in 10 report at least one negative health impact, ranging from stress to insomnia, anxiety and weight gain. Yet only 1 in 10 have accessed mental health supports.
- Need for support | Despite the volume of information and resources available, these women desire more support. Many don't know where to look, nor do they have the time to investigate or sort through all of the information available.





2. While the situation remains challenging for many, there is an underlying sense of optimism about the future. Many are looking forward to the future, and can recognize silver linings emerging as a result of the pandemic.

- Some positives | Around half of women entrepreneurs surveyed indicate that the pandemic has had at least some positive impact, with 2 in 10 saying that their business has grown as a result of the pandemic.
- Optimism abounds | Seven in ten (68%) are optimistic about the future. Nearly 9 in 10 believe that they're at least somewhat likely to be in business 5 years from now. Further to this, majorities who implemented severe measures like reducing salaries and staff, closing physical locations, and giving up real estate – in addition to being unable to pay rent – believe that these measures are just temporary.
- Values underpin resilience | Canadian self-employed women embody a unique set of *social values* that can help explain why and/or how they can remain positive in such unprecedented times. They're more likely to be optimistic about the future and approach life with unrivalled vigour. Adapting to challenging or unforeseen circumstances comes easily to them. They care deeply for their community and strive to contribute toward it, or toward something bigger than themselves. Through personal challenge, they are persevering, goal-focused and tend to reject failure.



3. Leveraging their unique values, mindsets, tools and available resources, they've adapted, pivoted and implemented various strategies to help them cope with the everchanging and challenging situations they face.

- Reflective times | Acknowledging feelings of uncertainty surrounding the pandemic, many of the women we spoke with took this as an opportunity to reflect (on self and business), reprioritize and focus efforts. Being resourceful, upskilling where possible, and expressing gratitude, are common tools they draw on to get by.
- Proactive steps taken | Nine in ten women entrepreneurs surveyed have implemented at least one action to manage the impacts of COVID-19 on their business. A plurality (40%) report that they've adapted by working from home; just over one-third (36%) accessed government support; and 27 percent have taken a personal pay cut.
- Resources underutilized | Despite the challenges they've experienced, only 18 percent sought out support or resources specifically from groups, organizations and networks; and even fewer have sought out mental health supports (14%). Looking forward, as 3 in 10 (29%) see mental and physical health as a priority area, promoting programs and ensuring access to mental health supports will be important.





WOMEN'S ENTERPRISE ORGANIZATIONS OF CANADA | COVID-19 RECOVERY SURVEY – Qualitative Insight

Strategic planning and COVID-19

- The pandemic has been a significant disrupter. In many instances, the pandemic has accelerated plans that were in the long-term pipeline, or forced business owners to completely reconsider their strategy, in order to survive in this new normal.
- The future outlook has been reigned in, with many reluctant to think past the next few months (i.e., beyond March 2021).
- Future-proofing, developing agile strategic plans and emergency preparedness are key resources and information needs that could have appeal to many.

"We were able to pivot quickly; and with a quick marketing idea, we were able to get our name out to the community faster and had more community support as a result."



Digitization and technology

Most of the women we spoke with are well-versed in technology; and have a good understanding, skill set and comfort level needed to adapt with the changing environment. For many, completely shifting to digital (i.e., working from home, ecommerce, virtual conferences, virtual service delivery) was not a significant leap during the onset of the pandemic; but did take time, capital investment, and a bit of a learning curve to adapt and adopt. Of course, not all were so easily able to adapt and pivot.

- As their *social values* imply, adapting to, and working one's way around, complexities are key characteristics of this group. Their flair for making the most with existing resources, and learning and changing with situations, has helped them navigate the pandemic; with technology being an important catalyst.
- *Enthusiasm for Technology* is a key value held by Canadian business owners; however, male entrepreneurs skew much higher on this construct. Women entrepreneurs, while comfortable using technology, tend to over-index on *Technology Anxiety*, suggesting that tech innovation and digitization may not come naturally; therefore, support and encouragement are required.
- Many women entrepreneurs utilized the lockdown to re-evaluate their businesses, and formulate plans to keep afloat using technology and digital platforms.
- For some, the lockdown only propelled the process of digital transformation within their organizations. But for others, this change posed some challenges. That said, in most cases, digitizing business processes, systems and offerings was met with little aversion, as shifting to digital seemed inevitable.
- Those who are younger, higher-educated and in businesses that rely on technology are among the most likely to have made an easy switch; or had already been operating in this fashion for some time. Urbanity doesn't seem to have a significant impact on ability to adapt even among those in rural or remote areas with the exception of inconsistent Wi-Fi/Internet connection.

TECHNOLOGY ANXIETY

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People strong on this construct are intimidated and threatened by technological changes and express high concern regarding the ethical and moral dimensions towards which science is advancing.

ENVIRONICS

SOCIAL VALUES

STATUS AND

SECURITY

4. One-third (36%) of women entrepreneurs surveyed have accessed government business supports, and fear they will be negatively impacted once the supports are terminated (73% say negative).

- Reliance on government supports | Those who have accessed COVID-19-related government supports report various benefits, including enabling operations to continue (including paying employee wages), opportunity to invest in upgrades (i.e., e-commerce), pay/subsidize/defer rent and, above all, ensuring some peace of mind (even if only temporarily).
- Unclear access a deterrent | Those who have not sought out government supports cite confusion and being overwhelmed by the options available. Some also mention financial risk as a deterrent, with smaller businesses not wanting to incur large debts.
- Complexity a barrier | Outside of COVID-19, there are several barriers to accessing business supports, which may help to explain and contextualize the reluctance to obtain assistance now, including a lack of awareness of options available, as well as a lack of clarity about who qualifies and what's needed to qualify. There is also a perception that the research and application processes are long, drawn out and complicated, with no guaranteed outcome (and they would rather spend time elsewhere). The size/amount of support available also seems daunting for some, especially those with smaller revenues. And there is a strong sense of pride/ownership and wanting to do it on their own without assistance.



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5. Three-quarters have sought out support, information or resources since the beginning of the pandemic; yet only 4 in 10 feel that they have decent enough access to the supports they need to be successful in the future. Only one-third find it easy to access the information they need.

- Elevate accessibility | Given that 6 in 10 are feeling potentially underserved, and one-quarter did not seek out any information, improving access to, and visibility of, programming and resources will be important moving forward.
- Low exposure | Lack of awareness of what is available is a key barrier to access. Women business owners want support resources and development programs, but are not always actively searching for programs or information; nor are they aware of the options available or relevant to them. While some actively seek out specific, relevant programs based on business/personal needs and challenges, most are accessing resources through happenstance or push campaigns.
- Not an easy process | Of those who sought out information, only onethird (32%) indicate it was easy. Long, complicated and drawn-out processes are a deterrent; large volumes of information are daunting.
- Information overload | The pandemic has led to an influx of resources and information from many different sources – which can be overwhelming, and exacerbate existing stress and anxiety. Many indicate that they've been bombarded with information since the beginning of the pandemic – ranging from email newsletters, Instagram posts, invites to webinars/symposiums, and conversations with their network. Therefore, any new information needs to break through and differentiate, and be easily digestible.

WEOC

Nomen's Enterprise

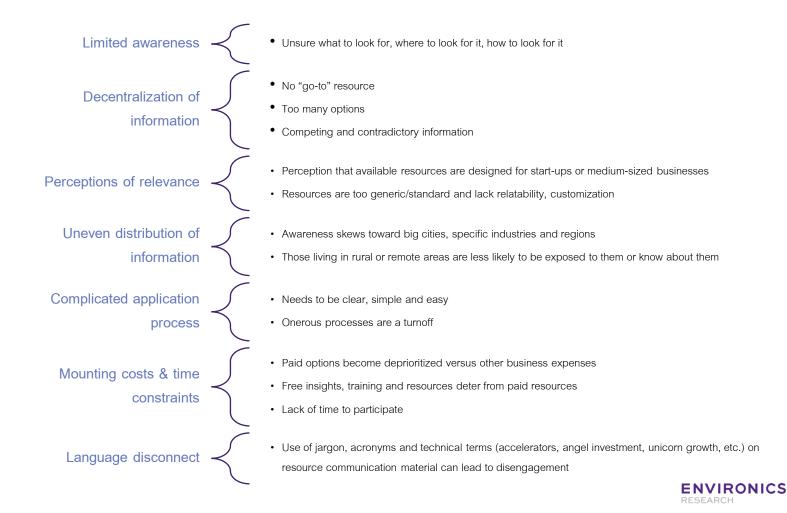






The women we spoke with are looking for support programs and resources, but are unable to do so successfully due to limited awareness, uneven distribution of information (for those living in remote or rural areas), and lack of relatability and engagement. There is an opportunity to better serve women entrepreneurs by ensuring that information resources have a wide reach and are easily accessible, and that processes are streamlined. Resources that bridge the gap between generic and customized are likely to have more relevance and appeal.

Key barriers to accessing information & resources



6. Marketing, revenue generation, business development and government support are priority areas in the short-term; and in highest demand for increased support and resources.

- Generating business is key | Most are focusing efforts on customer attraction and retention, increasing revenue, and marketing and business development activities. Consequently, these areas are in high demand for increased support and resources.
- Shoring up marketing knowledge | Many of the women we spoke with admit that marketing is not one of their strengths or focuses. Key areas where they could use more support include: identifying target segments, finding and targeting customers, developing resonant and meaningful messaging, unique selling points, reasons to believe, branding, design, website, and managing social media presence. Naming products and pricing strategies also pose a challenge for some.

Incredible ways to increase your revenue while maintaining satisfaction

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7. There is widespread agreement that groups and organizations that support women entrepreneurs are relevant; however, only 3 in 10 are members of such organizations.

- Organizations relevant early on | Organizations/groups that support women entrepreneurs have higher perceived relevance among businesses in the early stages of their journey – the utility and relevance of which seems to wane as businesses become more established.
- Perception gaps apparent | Many associate these organizations with networking and/or social benefits (i.e., making connections). There is weaker association with learning/upgrading skills; business expansion/set-up; and self-care, health and wellness – which are, consequently, key areas of interest.
- Prioritizing development | There is growing interest in opportunities to learn, develop and gain new skills, which are areas that are not currently strongly associated with these types of organizations and groups.





8. Organizations and groups that support women entrepreneurs play an important role in business success, helping to neutralize some of the impacts of the pandemic among their constituents.

- Membership cushions COVID-19 impact | Current members of organizations/groups that support women entrepreneurs are likely to view the pandemic through a neutral lens, as having both positive and negative impacts (40%). In contrast, non-members are significantly more likely to report that the pandemic has had negative impacts (49%).
- Proactive and empowered | While they are just as likely to report financial loss or gain, current members are significantly more likely to feel optimistic about the future (86% versus 62% non-members). This optimism may be explained by the fact that members are significantly more likely than non-members to have taken action to combat the effects of COVID-19 (especially training, shifting to digital, transforming business model, etc.) and to have actively sought out information (especially government subsidies and marketing). On average, members have taken 5 actions to mitigate the impacts versus 2 actions taken, on average, by non-members.
- Value of membership realized | Current members are more likely to draw the connections to activities and supports like learning, skills development and business supports, over and above traditional networking perceptions.
- Broaden the reach | With a current reach of around 25% of women entrepreneurs, and mostly among those in earlier stages of business, there is an opportunity to reframe how women entrepreneurs view and engage with these organizations.



ENVIR RESEARCH 9. There is an opportunity for organizations and groups to realign tools and resources to meet changing needs and reframe perceptions.

- Reframe perceptions | Perception: some organizations serve only select groups or paint all women entrepreneurs with the same brush. The risk is that this may lead to organizations underserving more sophisticated or high-growth businesses, or even alienating others.
- Tailoring to individual needs | Women entrepreneurs in Canada have diverse needs and goals; and it's important that support systems, processes and resources be structured in a way that ensures the entrepreneur is met at their level and aligned with their goals.
- Target mindsets | The research uncovered 4 key mindsets of women entrepreneurs, anchored by growth trajectory and willingness/openness to support:
 - Mindset 1: Organic Growth + Low Access of Supports
 - Mindset 2: High Growth + Low Access of Supports
 - Mindset 3: Modest Growth + Open to Supports
 - Mindset 4: Significant Growth + Open to Supports

THE FUTURE IS FEMALE

WEOC Women's Enterprise Organizations of Canada ENVIRONICS RESEARCH

Considerations

Address Access

- To extend reach and impact, raise the profile of groups and organizations that support entrepreneurs, including services, resources and benefits provided; reframe positioning to align with the needs and mindsets of today's entrepreneur.
- Address barriers, and facilitate ease of access to information and resources.
 Consider how information and tools are delivered and presented, to accommodate this time-stressed group.

Serve & Support

- Reframe perceptions, and address relevance and resonance by speaking more holistically to, and serving, the diversity of women entrepreneurs.
- Evaluate and optimize supports for growthoriented businesses.
- Share experiences, learn from others, and elevate wins.

Align Resources

- Going forward, promoting programs and ensuring access to mental health supports will be an important way to support women entrepreneurs.
- Support the shift to digital, to enable success.
- Promote and develop resources related to marketing: customer attraction and retention, brand and online presence.

ENVIRONICS

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REGIONAL SNAPSHOTS

BRITISH COLUMBIA

COVID-19 Landscape During Field (Nov. 10-27, 2020)

In British Columbia, the province reached close to 7,000 active cases, the highest total to date. The social lockdown that was already in place was further extended, with new rules implemented such as mandatory masks in indoor public and retail spaces as well as restricting social gatherings to household members only for everyone across B.C.

SAMPLE BREAKDOWN (n=58)*

Age	l i i i	L	Jrbanity	I	Ethnicity	
18-24	-	A	Urban: 36%		Visible	
25-34	14%				minority: 5%	6
35-54	51%	æ	Suburban: 42%		Indigenous	: 7%
55-65	24%	۵			Ū	
65+	11%		Rural: 19%	\triangle	White/Cauc 90%	asian:
	Size of business	Other: 3%	Туре	other: 7% of Industry		
Micro (Just me – 2 to 4): 89%			Retail Trade			11%
			Professional, Scientific a	rvices (e.g.	10%	
Small	Small (5 to 49): 11%		legal, accounting, adver		10%	
ШО			Health Care and Social Assistance			10%
			Educational Services			8%
WEOC Women's Enterprise Organizations of Canada			Other services			36%

REGIONAL SNAPSHOT: COVID Impacts to Date

Impact of COVID-19 Pandemic on Business

- Impact is mixed, with similar proportion of respondents indicating negative (33%), neutral (25%), or no impact (25%).
- Versus other regions, respondents in BC are slightly more positive about the change in business situation versus 3 months ago, with 8 in 10 indicating their situation is the same or better.
- One-third accessed government supports, subsidies.

Personal Impact of COVID-19 Pandemic

- Neutral to negative personal impact, with mixed impacts reported when it comes health and well-being (44% indicate negative impacts, 38% indicate some negative some positive).
- Stress, anxiety, weight gain, lethargy are the most significant health impacts, yet only 2 in 10 accessed mental health supports.

COVID-19 Supports

- 6 in 10 respondents from BC feel they have good access to supports/resources and found the process of finding information to be easy and the information to be effective.
- 3 in 10 accessed government supports, yet the termination of such supports is predicted to have a mixed impact.

Participation in Groups/Organizations that Support Women in Business

• Of our survey respondents in BC, 2 in 10 are current members of organizations or groups that support women in business and two-thirds find such groups relevant, especially for business development, mentorship, networking, expert advice, and staying up-to-date on trends.

Future Outlook

- Optimistic about the future and about the prospect of being in business 5 years on.
- Top priorities: Customer attraction & retention, marketing, and revenue, but significantly less inclined to focus on business development activities.
- Need more support in marketing and generating revenue, but also seeking more mental health supports.

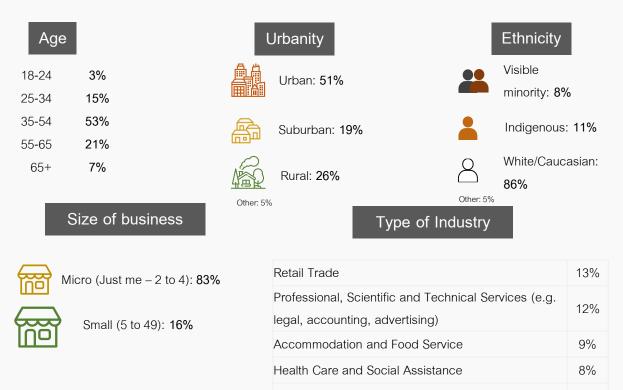
Opportunity for Groups/Organizations Supporting Women in Business – Focus supports and resources on marketing and customer retention, but also self-care, including providing access to mental health supports.

PRAIRIES

COVID-19 Landscape During Field (Nov. 10-27, 2020)

In the prairies, a record number of new cases was set (Alberta) and several outbreaks had been declared (Manitoba). The government implemented restrictions by closing indoor fitness activities and reduced operating hours for restaurants, implementing a mandatory mask policy, and restricting indoor private gathering sizes.

SAMPLE BREAKDOWN (n=125)



Other services

REGIONAL SNAPSHOT: COVID Impacts to Date

Impact of COVID-19 Pandemic on Business

- Mostly negative impact, and perception that it is worsening. This is especially so in Alberta and Manitoba.
- Most likely of the regions to report negative fallout of the pandemic (57% negative vs 43% overall), and to feel the situation is intensifying.
- Have implemented a number of strategies to cope with the pandemic are among the most likely to have taken training
 or courses, shifted/upgraded digital, and to have sought out mental health supports for self/staff.

Personal Impact of COVID-19 Pandemic

- Impact of the pandemic on themselves is neutral-to-negative; respondents in the Prairies are the most likely to report negative personal impacts (48%).
- A majority report their mental and physical health have been negatively impacted (54%), including stress, anxiety, insomnia (among others).
- Higher likelihood of seeking out, and accessing mental health supports and information about mental health and wellbeing (27%).

COVID-19 Supports

- Only one-third feel they have decent access to supports/resources, with plurality of 40% who are indifferent about access. While many are neutral about how easy it is to find information (38%), this region is more likely to indicate the process of finding relevant information was difficult (29%). While most indicate the information eventually found was effective, they do so with less intensity versus other regions.
- 3 in 10 accessed government supports, yet the termination of such supports is predicted to have a mixed impact

Participation in Groups/Organizations that Support Women in Business

Of our survey respondents, 27% are current members of organizations or groups that support women in business and just over half find such groups relevant, especially for professional advice, business development, mentorship, networking and learning new skills.

Future Outlook

19%

- They tend to be optimistic about the future and about the prospect of being in business 5 years on. Alberta being the most optimistic and Manitoba being the least optimistic in the region.
- Top priorities: Customer attraction & retention, revenue, generation, marketing, business development, and paying bills/debt/rent.
- Seeking more support in marketing and generating revenue, accessing government subsidies, business development, and business strategy.

Opportunity for Groups/Organizations Supporting Women in Business – *Focus on accessibility of information and resources, including ease of use. Marketing and customer retention are key priorities as are strategies for financial management, including obtaining government supports, generating revenue, and prioritizing accounts payable.*



ONTARIO

COVID-19 Landscape During Field (Nov. 10-27, 2020)

In Ontario, Toronto and Peel Regions moved into Grey lockdown zone (modified Stage 1) during field as it tried to curb a steep rise in the COVID-19 cases, shuttering indoor dining, closing non-essential businesses and services; a further 5 neighbouring regions moved into more restrictive zones as well. Ontario reported over 1,400 new cases on Nov. 20 as the province's total case count since the pandemic crossed 100,000.

SAMPLE BREAKDOWN (n=165)

Ag	е	U	Jrbanity	- I	Ethnicity	
18 - 24	3%		Urban: 45%		Visible minority: 16	0/_
25-34	15%				minonty. 10	/0
35 - 54	46%	æ	Suburban: 30%		Indigenous:	: 7%
55 - 65	26%				5	
65+	10%	ALCO A		2	White/Cauca	asian:
			Rural: 24%		72%	
	Size of business	Other: 2%		Other: 11% pe of Industry		
Micro (Just me – 2 to 4): 90%			Professional, Scientific	and Technical Ser	vices (e.g.	17%
			legal, accounting, advertising)			17/0
			Arts, Entertainment and Recreation			14%
			Health Care and Social Assistance			9%
			Retail Trade			6%
WEOC			Other Services			25%

REGIONAL SNAPSHOT: COVID Impacts to Date

Impact of COVID-19 Pandemic on Business

- A plurality report mostly negative impacts resulting from the pandemic (44%), with losses anticipated to be less than 50% of revenue.
- Despite the impacts felt, a plurality of 4 in 10 feel they are better off versus August 2020, however, 6 in 10 still feel like their situation is the same or getting worse.
- Versus other regions, Ontarians were most likely to have worked from home (46%) and accesses government supports (42%). They were also more likely to have taken training courses and addressed digital capabilities.

Personal Impact of COVID-19 Pandemic

Most report a neutral to negative personal impact from the pandemic, with 50% indicating the impact has been neutral (somewhat higher than their counterparts in other regions). Results are similar when it comes to their mental and physical health, with nearly equal proportions indicating impacts have been negative (44%) or some positive, some negative (45%). Again, Ontarians are most inclined to recognize both positive and negative impacts, yet only 2 in 10 have sought out mental health supports.

COVID-19 Supports

- Perception of access to supports is mixed, with a plurality of 43% indicate access is neither good nor bad; Respondents from Ontario are most likely to indicate their access to information and resources is poor (26%). While many are neutral about how easy it is to find information (47%), this region is among the most likely to indicate the process of finding relevant information was difficult (27%). Just over 6 in 10 indicate the information eventually found was effective.
- Respondents from Ontario are more likely than their counterparts in other regions to have sought information and resources related to marketing, digitization/e-commerce, business strategy, and R&D/innovation.

Participation in Groups/Organizations that Support Women in Business

Among our respondents in Ontario, 40 percent are current members of organizations or groups that support women in business, and two-thirds find such groups relevant, especially for professional advice, mentorship, business development, making personal connections and learning new skills. They are the most likely of the regions to find these groups/organizations can generate hiring leads or support in the hiring process.

Future Outlook

- Very optimistic about the future and about the prospect of being in business 5 years on.
- Top priorities: Customer attraction & retention, marketing, revenue, business development, and health and well-being; and more emphasis placed on training and skills building versus other regions.
- Similar to other regions, they are seeking more support in marketing and generating revenue, business development, and place more emphasis on digitization/e-commerce than other regions.

Opportunity for Groups/Organizations Supporting Women in Business – As Ontario continues to face province-wide shutdowns, including non-essential services closed, focus supports on marketing and customer retention, and digitization.



COVID-19 Landscape During Field (Nov. 10-27, 2020)

Quebec's total number of cases since the start of the pandemic increased to over 117,000, with just under 11,000 still active. Quebec has been gradually updating the province's response and imposing various restrictions that had previously been lifted. During field, the province was in Red Alert, with public health measures in effect including keeping dining rooms, gyms, bars and museums closed.

SAMPLE BREAKDOWN (n=24)*

Age		l	Jrbanity	I	Ethnicity		
18-24	7%		Urban: 57%		Visible minority: 4 %	6	
25-34 35-54	4% 33%						
55-65	27%	 	Suburban: 34%	Ă	Indigenous	-	
65+	28%		Rural: 9%	\triangle	White/Cauc 92%	asian:	
Size of business Type of Industry							
Micro (Just me – 2 to 4): 89% Small (5 to 49): 11%			Professional, Scientific a		vices (e.g.	33%	
			legal, accounting, adver				
			Arts, Entertainment and Recreation			11%	
			Health Care and Social Assistance			10%	
			Retail Trade			8%	
WEOC Women's Enterpris Organizations of Canad	- 6		Other services			14%	

REGIONAL SNAPSHOT: COVID Impacts to Date

Impact of COVID-19 Pandemic on Business

- A plurality report mostly neutral impacts resulting from the pandemic (43%), with losses anticipated to be less than 50% of revenue.
- 56 percent, the highest across the regions, indicate their situation is neither worse nor better compared to August 2020.
- While many have implemented various measures to cope with the pandemic, versus other regions, they tend to report doing so in less frequency, especially accessing government supports, taking courses, shifting to digital, accessing support/resources, seeking out mental health supports, etc.

Personal Impact of COVID-19 Pandemic

Most report a neutral to negative personal impact from the pandemic. Results are similar when it comes to their mental and physical health, with nearly equal proportions indicating impacts have been negative (40%) or mixed (38%). That said, they are the least likely to have sought out mental health supports (13%) versus other regions.

COVID-19 Supports

Perception of access to supports is favourable, with almost half indicating they have good access (48%), and a further 56% who indicate they found it easy to access the information or resources they needed. Most are of the opinion that the information found is effective.

Participation in Groups/Organizations that Support Women in Business

- Versus other regions, our Quebec respondents are the least likely to be current members of any group, organization, or association supporting women entrepreneurs; they are least inclined to find such groups as relevant to their needs.
- ٠ As a result, they are least likely to have sought out information and resources during the pandemic from organizations/groups/associations.

Future Outlook

- While many are optimistic about the future, versus other regions, they are more likely to be neutral, and are more cautious about their future prospects.
- Top priorities: Marketing, customer attraction & retention, managing working from home, revenue, and business development.
- Similar to other regions, they are seeking more support in marketing, business development, accessing government support, camaraderie, and revenue/sales. That said, they are more likely to indicate they are not seeking out additional support or resources.

Opportunity for Groups/Organizations Supporting Women in Business - Our Quebec respondents tend to be of the "do it myself" mentality. Raise the profile of groups/organizations and the role they can play in supporting local entrepreneurs and driving success and mitigating the effects of the pandemic. Provide support in accessing government subsidies (as our Quebec respondents are least likely to have accessed such supports) as well as marketing, business development.

ATLANTIC

COVID-19 Landscape During Field (Nov. 10-27, 2020)

New restrictions were announced to restrict social gatherings in Halifax Regional Municipality to 5 people (down from 10). New Brunswick reported 23 new cases - the most new cases in one day - bringing the number of active cases to 71. Those regions were in orange phase of recovery. PEI implemented mandatory masks throughout shows at entertainment venues, even if physical distancing can be maintained.

SAMPLE BREAKDOWN (n=26)*

Age		l	Jrbanity			Ethnicity	
18-24	-		Urban: 31%			Visible	,
25-34	21%					minority: 2%	0
35-54	44%	A	Suburban: 27	%		Indigenous:	12%
55-65	11%	ஹை		70		0	
65+	24%		Rural: 43%		\triangle	White/Cauc 92%%	asian:
S	Size of business		l	Type of In	Other: 4%		
Æ M	icro (Just me – 2 to 4): 90%		Health Care an	d Social Assistan	се		17%
Small (5 to 49): 10%			Professional, Scientific and Technical Services (e.g. legal, accounting, advertising)				
			Information and Cultural Industries (e.g. publishing,			11%	
			broadcasting, Internet)			1170	
WEOC			Arts, Entertainment and Recreation				10%
Women's Enterprise Organizations of Canada	*1		Other Services	- 1:4 - 4: 1			24%,

REGIONAL SNAPSHOT: COVID Impacts to Date

Impact of COVID-19 Pandemic on Business

- A plurality report mostly negative business impacts resulting from the pandemic (40%), with losses mostly anticipated to be less than 50% of revenue. Respondents from the Atlantic region are least likely to report positive impacts resulting from the pandemic.
- Half indicate their situation is neither worse nor better compared to August 2020.
- They are most inclined to report they've worked from home, yet versus other regions, they tend to have adopted proactive measures in lower frequency, especially shifting to digital, transforming business models, fast-tracking plans, etc.

Personal Impact of COVID-19 Pandemic

 A plurality report neutral personal impacts from the pandemic (41%); however, respondents in this region are the most likely of the regions to indicate a positive impact (23%). When it comes to their mental and physical health, with nearly equal proportions indicating impacts have been negative (38%) or mixed (30%). That said, they are among the most likely to have sought out mental health supports (28%) versus other regions.

COVID-19 Supports

- Perception of access to supports is favourable, with almost half indicating they have good access (48%) and 81% indicating information and resources are effective. However, when it comes to ease of access, opinions are mixed: 39% indicate easy, and 43% are neutral.
- One in three Atlantic respondents indicate they accessed government supports, and the termination of which is expected to be negative.

Participation in Groups/Organizations that Support Women in Business

Versus other regions, one-quarter of respondents from the Atlantic region are current members of any group, organization, or association supporting women entrepreneurs; with two-thirds who agree they are relevant to their needs. Key benefits include expert advice, learning new skills, personal connections and mentorship, and staying current to trends.

Future Outlook

- Just over 6 in 10 are optimistic about the future generally, however, their feelings are mixed when it comes to the prospect of being in business in 5 years' time.
- Top priorities: Revenue, customer attraction and retention, working from home, paying bills, digitization.
- Similar to other regions, they are seeking more support in generating revenue/sales, accessing government support, accessing financing and funding, digitization, and health & well-being.

Opportunity for Groups/Organizations Supporting Women in Business – In the Atlantic region, where the impacts of COVID-19 have been less severe and closures less stringent (versus other regions), provide tools and resources needed to set them up for success and ready them should the situation change. Facilitate ease of access to information and supports, specifically around accessing government supports, revenue generation, and financing/funding.

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TERRITORIES

COVID-19 Landscape During Field (Nov. 10-27, 2020)

In Yukon, there was a total of 45 cases, 15 of them were active. Nunavut added a total of 46 new cases over one weekend, bringing the total to 128 active cases. In NWT, the government announced that all residents of a household must self-isolate for 14 days when a person in that home returns from travel.

SAMPLE BREAKDOWN (n=10)*

Age		l	Jrbanity			Ethnicity	
18-24	12%		Urban: 14%			Visible	_
25-34	57%					minority: 7%	D
35-54	31%	æ	Suburban: 40)%		Indigenous:	-
55-65	-					J. J	
65+	-		Rural: 27%		\triangle	White/Cauca 93%	asian:
Size of business Type of Industry							
Mi	cro (Just me – 2 to 4): 89%			Scientific and Teching, advertising)	nnical Sei	rvices (e.g.	14%
	Small (5 to 49): 11%		Educational Se			12%	
			Agriculture, Fo	restry, Fishing an	d Hunting	9	8%
			Administrative and Support, Waste Management and Remediation Services				7%
WEOC Women's Enterprise Organizations of Canada			Other Services	;			34%
er Bannzaciona or callada	*Low base size Results sh	hould be	interpreted a	ulitatively and us	ad diract	ionally due to	small

REGIONAL SNAPSHOT: COVID Impacts to Date

Impact of COVID-19 Pandemic on Business

- Participants from the Territories report neutral to positive impacts resulting from the pandemic, with the situation remaining the same for the most part, versus August 2020.
- They implemented a number of different strategies to cope with the impacts of the pandemic, with catching up on admin, seeking mental health supports, and taking on new responsibilities as key measures.

Personal Impact of COVID-19 Pandemic

• They report mostly neutral personal impacts, generally, with most reporting negative impacts to their mental and physical health.

COVID-19 Supports

- Perception of access to supports is favourable, with most neutral about the ease of access, yet very favourable about the effectiveness and utility of the information received.
- While few participants from the Territories accessed government supports, those who did unanimously indicate the termination of such supports will have negative impacts.

Participation in Groups/Organizations that Support Women in Business

 Versus other regions, respondents from the Territories were less likely to be members of any groups, organizations, or associations supporting women entrepreneurs; respondents are divided as to the relevance of such organizations, they noted a range of personal and professional benefits.

Future Outlook

- Despite of the situation, the general tendency is to feel optimistic about the future, generally, as well as the prospect of being in business in 5 years' time.
- Top priorities: Customer attraction, expansion/scaling, paying bills, health, business development.
- Similar to other regions, they are seeking more support related to accessing government support, business plan development, financial management, accessing financing, and generating revenue.

Opportunity for Groups/Organizations Supporting Women in Business – In the Territories, where the impacts of COVID-19 have been less severe and closures less stringent, provide tools and resources needed to set them up for success and ready them should the situation change. Facilitate ease of access to information and supports, specifically around accessing government supports, financing and business expansion and marketing.

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