



The Western Cape Business Survey Report

- the impact of COVID-19 on businesses -

23 April 2020

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1. EXECUTIVE SUMMARY

To assist the Western Cape Government to better understand in real time, both the impact of COVID-19 on business and to determine how government can best support business for planned recovery, the Department of Economic Development and Tourism, within a week from the pronouncement of the Disaster Management Act and the first lockdown period activated, conducted a survey with businesses across the province to establish the extent of the impact of COVID-19 across all regions.

The Western Cape Business Survey asked businesses to reflect how they are affected, how they believe they will be affected, what business recovery support they need and what assistance they believe they require to build business continuity.

The global analysis of some businesses, coupled with the wealth of information that has been gathered within this report, provides some useful insights of how businesses are being impacted by COVID-19. The graphical representation of feedback from firms via our survey, along with the analysis thereof, illustrates some of the challenges caused by the COVID-19 pandemic and brings to light how businesses are adapting to overcome them. It also highlights areas that provide hope that firms will be able to navigate their way through this difficult period.

It is important to note that though the firms are navigating the same storm they are not all in the same boat. Some firms will be better able to cope with the challenges that they experience than others. Several reports could be written using this rich dataset. The focus of the current report is limited to providing a preliminary overview of the data and some initial insights.

2. BACKGROUND

The full effects of COVID-19's impact on the world will not be fully understood until the crisis has passed. Health and mortality aside, the impact on the South African economy and various sectors within have been immense. Given that this is a global pandemic, what happens internationally and how other countries manage the COVID-19 virus and the interventions that they implement will have an impact on South Africa's post-COVID-19 economy.

Based on a survey of SMEs in February, reports on China showed that a third of SMEs only had enough cash to cover fixed expenses for a month, with another third running out within two months, putting millions of Chinese SMEs at risk. Reporting on 14 March suggests 60% of Chinese SMEs are back in business, but now face further challenges due to reduced demand from other markets.

A survey by Deutscher Industrie und Handelstag (DIHK) of over 10000 German companies (85% of which had less than 200 employees), released on 9 March, indicated that almost half of respondents expected a negative impact on their business in 2020, with almost one third expecting a decline in turnover of more than 10%.

An early March survey of micro and small firms in Italy showed that 72% of the 6000 responding firms were directly affected by the situation because of a drop-in demand or problems along the supply chain and/or transport and logistics. One third of respondents estimated a decrease in revenues greater than 15%, and an additional 18% of firms estimated that decrease to be between 5-15%. The most affected firms are those in transport (98.9%) due to the demand downfall, then tourism (89.9%), fashion (79.9%), and agro-food (77.7%).

Also, in early March, the Korean Federation of SMEs published a survey of SMEs engaging in import/export. Of the 191 firms surveyed, 71.8% expected to be affected by the outbreak, with more than half of these firms stating that they were unable to meet delivery dates due to factory closures in China. A new wave of this survey among 407 SMEs (conducted between 17 and 20 March and released on 26 March) shows that 61.1% of SMEs have been impacted by the outbreak. 42.1% cannot continue business for more than 3 months; and 70.1% for no longer than 6 months. The entrepreneurs indicated that their situation is much more serious than during the 1997 Asian and 2008 Global financial crisis.

A UK survey by the platform Market Finance, released on 12 March, showed that 69% of SMMEs¹ have significant cash flow problems, with more than one-third fearing that without support they would not last until Easter.

Many of the issues that are being experienced by organisations globally resonates with the experiences of our local firms.

¹ Small, medium and emerging enterprises

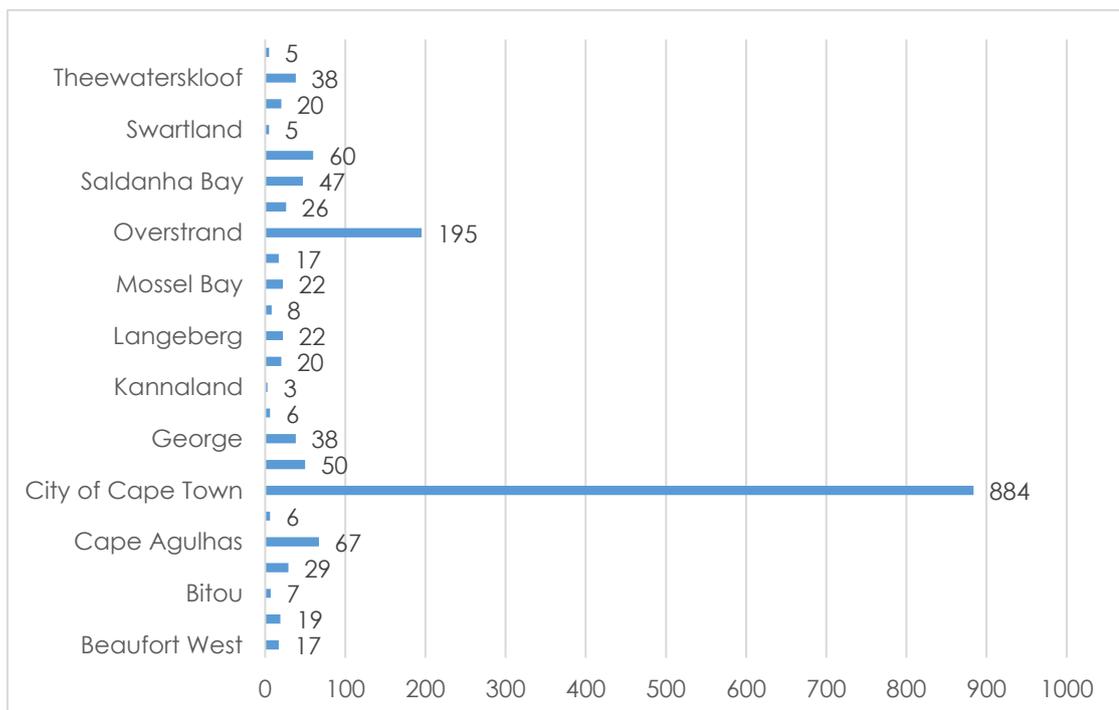
3. SURVEY DESCRIPTION AND DATA COLLECTION

The purpose of the survey is to provide close to real-time economic insight into the impact of the COVID 19 pandemic.

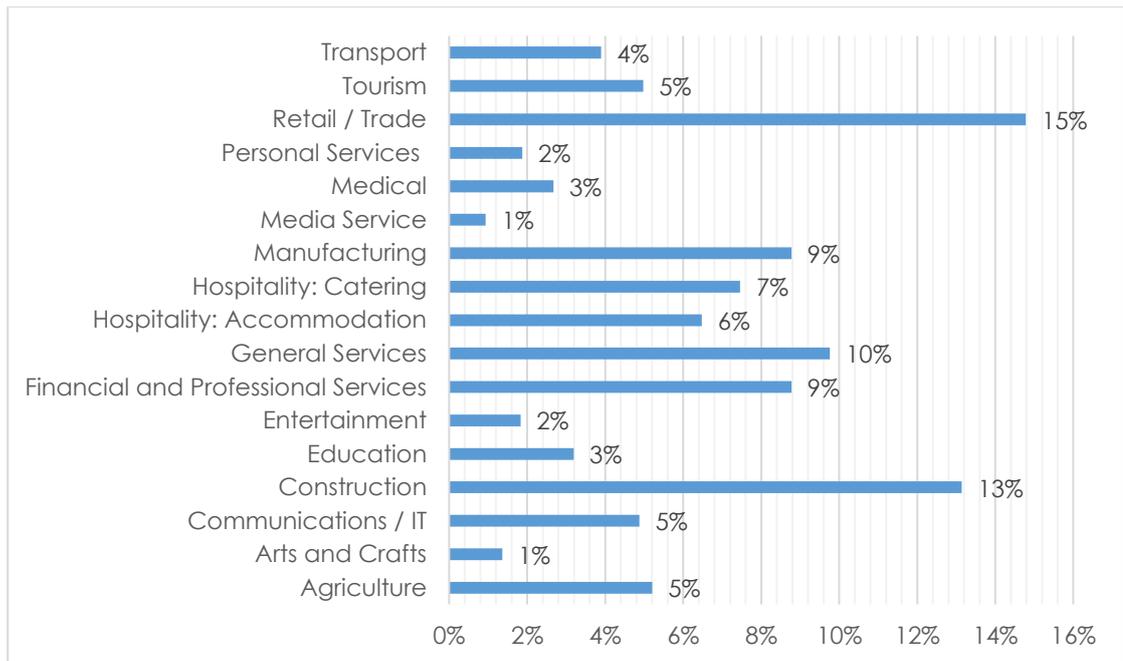
The survey developed within the first 5 days of the lockdown period, kicked-off on the 03 April 2020, and intended to reach out to businesses of all sizes across the metro and all five districts. Provincial government and municipal forums and agencies, social media platforms, sector bodies and organised business partners were amongst the range of networks accessed as widely as possible to gain essential information. Within 10 days responses exceeded 2000 from across the Province and the survey closed with 2150 respondents having participated, by 14 April 2020.

Note: In each category of questions, responses were verified as complete and valid. Variance in response numbers reflected are due to responses rendered invalid

Businesses were interviewed across a geographical spread and a range of sectors as captured in Graph 1, below.

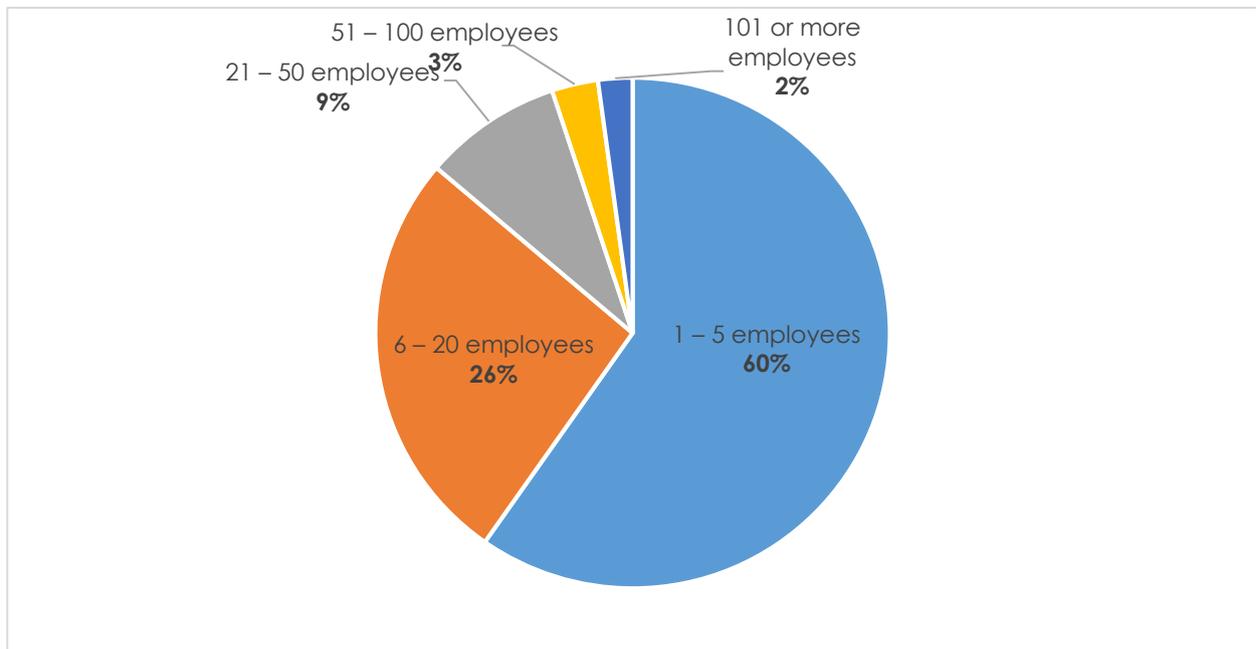


Graph 1: Single Site Business Response Distribution - 1611 Respondents



Graph 2: Standardised Sector Distribution - 2131 Respondents

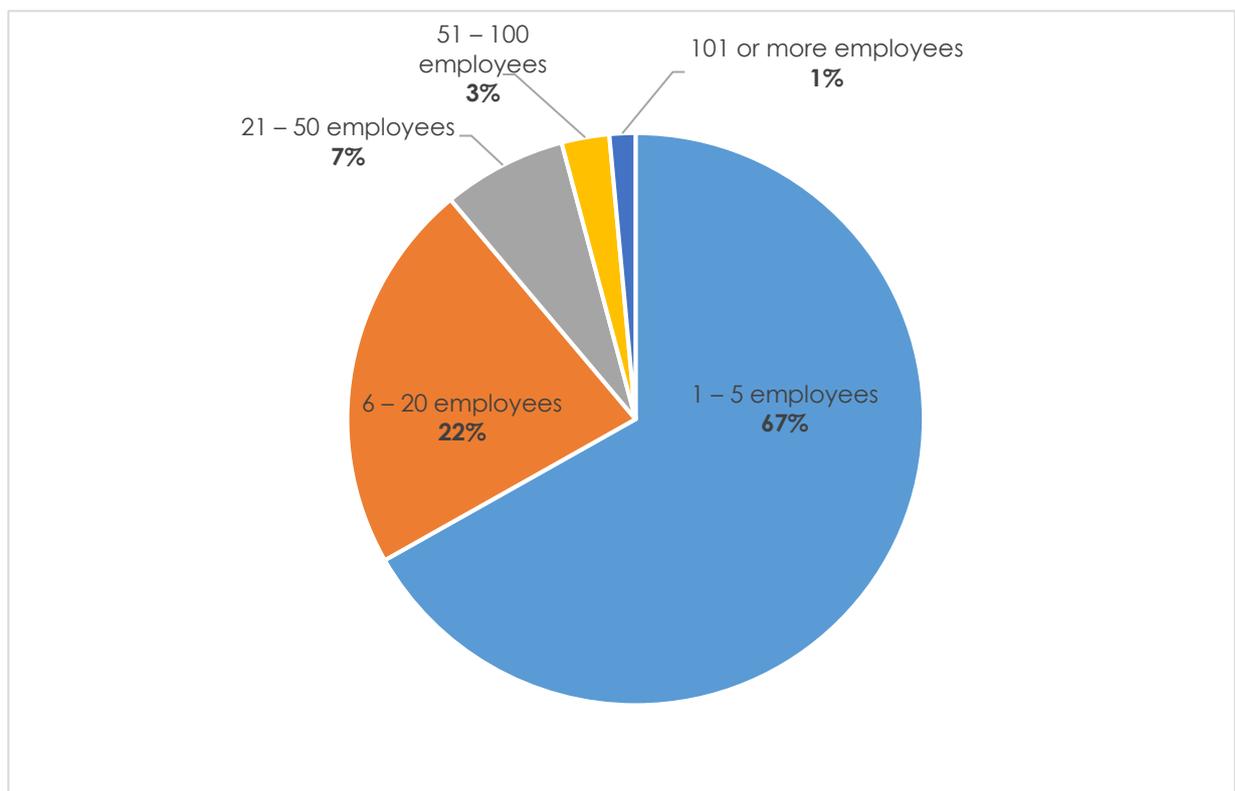
Graph 2 shows the range of businesses covered in the survey. 60% of the businesses surveyed employ between 1-5 employees and so would be classified as SMMEs. Of the remaining 40%, an estimated 26% of businesses employ between 6-20 employees.



Graph 3: Business Size by Employment - 2131 Respondents

The survey covered not only SMMEs but a number of bigger businesses as well.

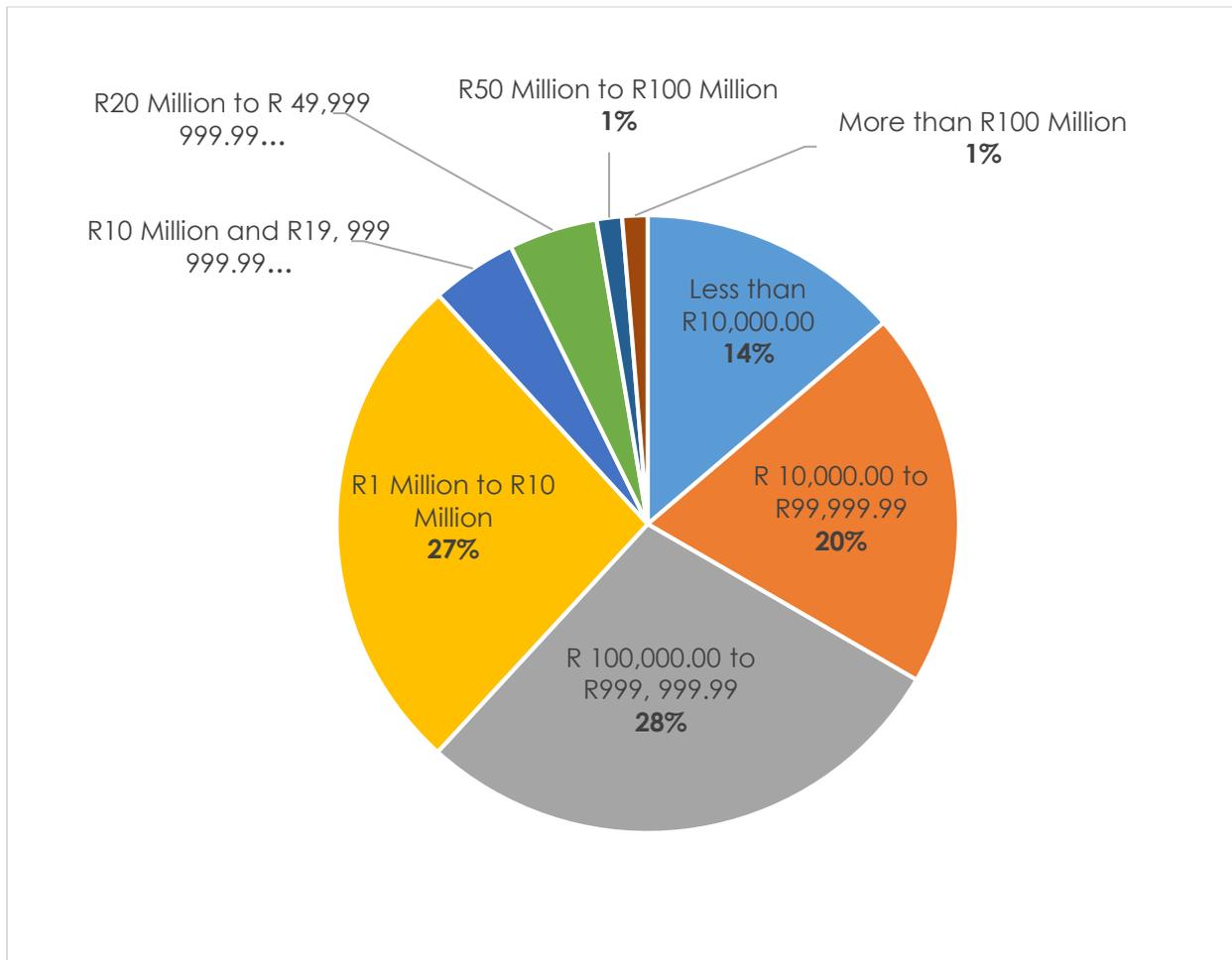
More than two-thirds of employees of these businesses are permanent employees who would be significantly impacted if the business were to shut down.



Graph 4: Number of Permanent Employees - 2129 Respondents

Many of the businesses employ people permanently but there are casual employees who are likely to lose their jobs first if the business shuts down.

The range of the “size” of the businesses is further illustrated in Graph 5, by the reported turnover of these businesses.



Graph 5: Indicated turnover of respondents – 2125 Respondents

Many businesses have relatively low annual turnover, this shows business support is very important and many businesses may not have any kind of financial buffer for an extended period of inactivity. Smaller companies, particularly, may not have the financial resources available to manage COVID-19 response options.

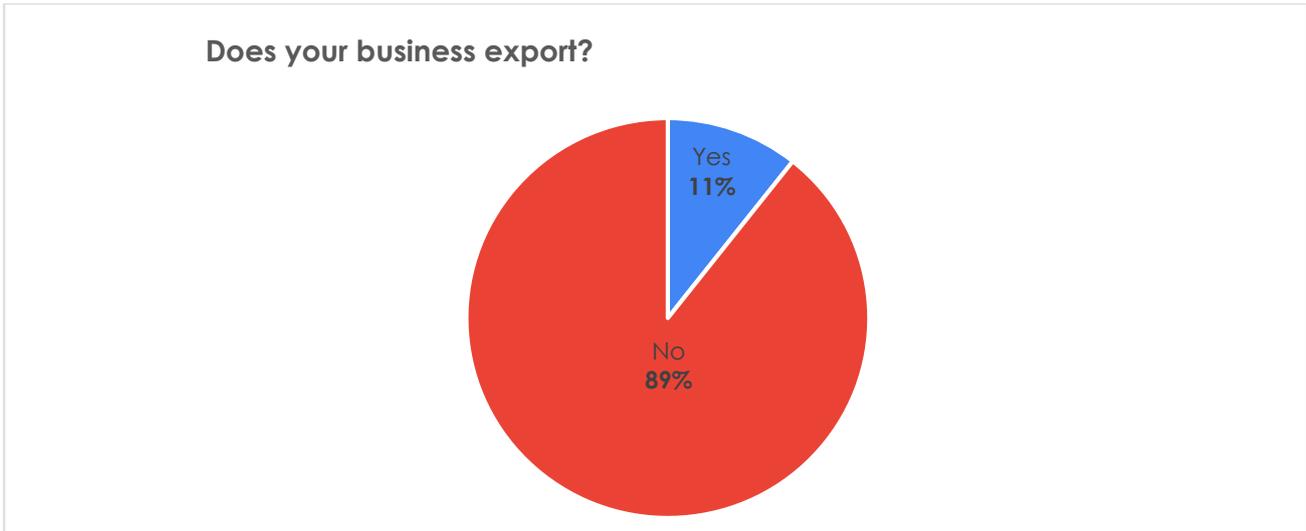
3. CHALLENGES EXPERIENCED BY BUSINESSES

Many of the businesses surveyed are dependent on domestic demand and only 10.6% of them export. The South African economy is expected to contract sharply. The Reserve Bank estimates that a contraction of 6.1% is likely, the IMF - 5.8% and Moody's -2.5%. Business for South Africa projects the economy could contract by a whopping 10%. Regardless of what the exact size of the contraction will be, it points to the fact that demand will be constrained, and many businesses are destined to experience challenges to remain operational.

Table 1 below, shows the retail/trade, construction and general services sectors staggeringly reflecting that just under 50% of these businesses expect to generate no revenue in the next 3-6 months.

Sector	Percentage Responses per Sector	Percentage that expects to generate no revenue	Percentage that expects to generate 80% less revenue
Retail / Trade	15%	49%	33%
Construction	13%	48%	26%
General Services	10%	46%	30%
Financial & Professional Services	9%	18%	32%
Manufacturing	9%	38%	38%
Hospitality: Catering	7%	58%	28%
Hospitality: Accommodation	6%	73%	23%
Agriculture	5%	34%	35%
Tourism	5%	76%	14%
Communications / IT	5%	28%	33%
Transport	4%	55%	27%
Education	3%	43%	28%
Medical	3%	21%	39%
Personal Services	2%	55%	23%
Entertainment	2%	62%	26%
Arts and Crafts	1%	59%	38%
Media Service	1%	40%	40%

Table 1: Sector reflection on revenue generation



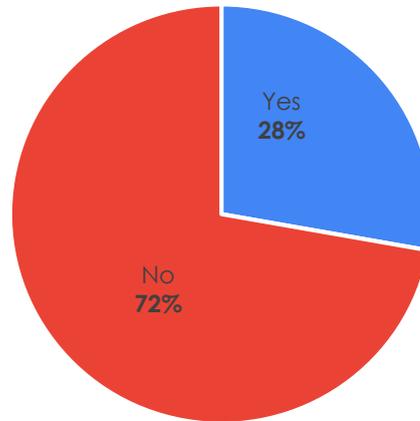
Graph 6: Businesses that export – 2131 Respondents

89% of businesses produce for local demand, which will be challenging going forward as domestic demand is projected to experience a significant contraction. Weekly StatsSA data related to food basket figures show that prices are seriously under pressure due to reduced demand; the extent differs per product.

Due to the challenging landscape in which businesses in the Western Cape find themselves, it is hard to adjust to the changing business environment. Over 70% of the businesses in the Western Cape have not found new business opportunities in response to the pandemic.

Given that many firms are focusing on survival it is concerning that only a small proportion of businesses have identified new business opportunities. It is however completely understandable that firms cannot necessarily easily pivot into new opportunities during a crisis.

Have you identified new business opportunities as a result of the pandemic?



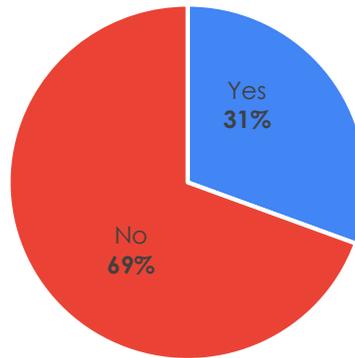
Graph 7: New business opportunities – 2131 Respondents

Findings of the Rapid Assessment on Business Recovery survey also revealed that adopting new business models, is not easy. Feedback from that survey reflected that even the retail sector (seen as more amenable to shifts to new business modelling) faces challenges, like traditional consumer behaviour that if more creatively expanded could open more opportunities to shift to online shopping that can expand online sales.

A big corporate noted that existing consumer behaviour, as well as delivery constraints, limits expanding online sales. The firm reported:

“Online/ Omni-channel is a key enabler for retail at this time. It must be noted though that online penetration is still low within the SA retail context. It might take some time for the SA customer to shift shopping patterns. Delivery capacity and last-mile challenges will be the only constraints”.

Have you had to source from different suppliers?



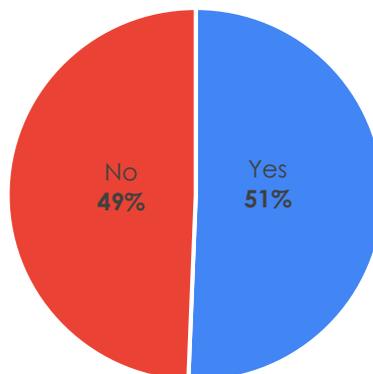
Graph 8: Different supply sources – 2131 Respondents

Most of the businesses surveyed (69%) are still maintaining the same suppliers.

Shifting to new business opportunities may also require shifting to new suppliers and this is something that many businesses have not been able to achieve. Suppliers may also be reluctant to accept new clients for fear of raising bad debt, given that many businesses may struggle to service debts owed to existing suppliers.

As discussed above, shifting to new suppliers and restructuring the business model to explore new opportunities could be challenging within a context where the business is struggling to generate income. Half (50.6%) of businesses interviewed had to cancel business contracts due to the COVID-19 pandemic.

Has your business had to cancel any business contracts due the COVID-19 pandemic?



Graph 9: Business contracts cancelled - 2131 Respondents

51% of the businesses lost contracts due to the COVID-19 pandemic. This links challenges that may be faced in trying to restructure the businesses in order to explore new business opportunities that may exist within the changing business needs.

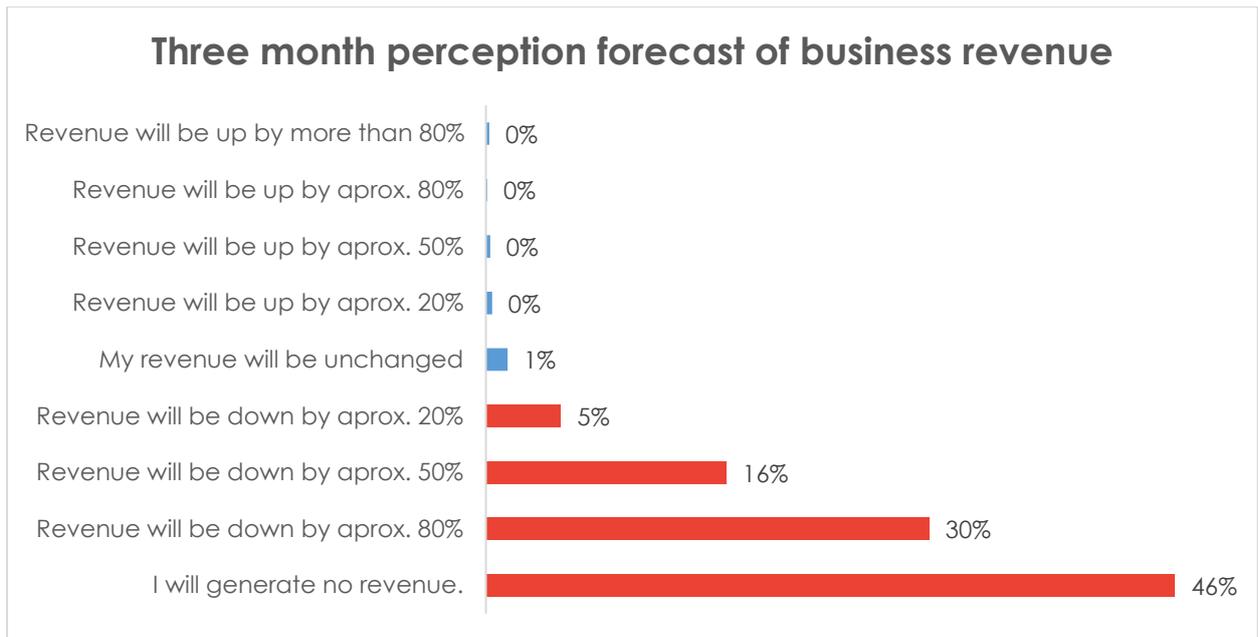
The table below summarises contracts that have been cancelled and the expected impact this will have on businesses. The total number of reported cancelled contracts amounted to 19123, with a value of over R1,5 billion, which could result in a total of 7789 potential employees being retrenched. Furthermore, the total number of businesses that could close either temporarily or permanently (cumulative) amounts to 529, representing a quarter of businesses surveyed.

Reported number of contracts cancelled (<i>in period of the survey review</i>)	19123	
Reported value of these cancelled contracts	R1,561,888,304	
Average value of reported cancelled contracts	R81 676	
Number of businesses indicating they will have to close either temporarily or permanently (cumulative)	529	25%
Business indicating, they might need to retrench workers (cumulative)	617	29%
Potential number of retrenched employees	7780 Employees	

Table 2: Impact of contracts cancelled

The cancelling of contracts is linked to the challenges businesses may experience in being able to afford to pay their most important business expenses. Almost three quarters (65%) of businesses reported that they would not be able to pay their most important business expenses.

This is further illustrated in businesses' response when asked about the perceived impact the lockdown will have on business revenue.



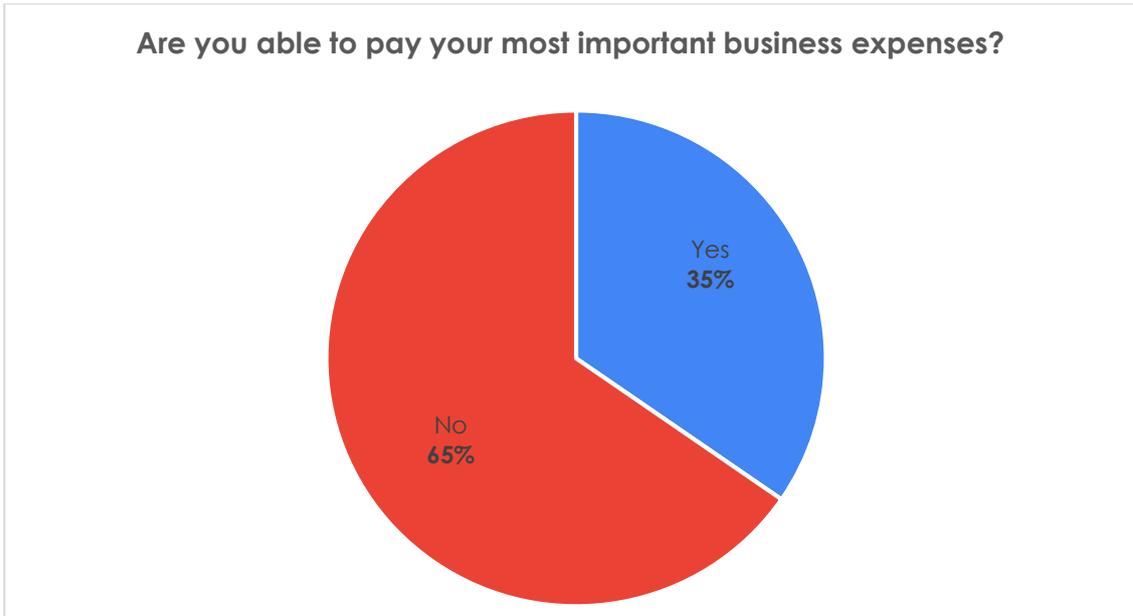
Graph 10: 3-Month perception forecast of business revenue – 2131 Respondents

76% forecast that they will either generate no revenue or face an 80% reduction in revenue. The question of business liquidity is critically highlighted then as businesses start to consider how basic operational costs will be covered.

The results mirror those of the “Business impact survey of the COVID-19 pandemic in South Africa 2020” conducted by STATS SA with 85% of the 707 respondents reported that their turnover was below the normal range.

A further parallel is highlighted in the assertion by STATS SA that the data indicates that “30,6% [of respondents] indicated they can survive less than a month without any turnover, while 54,0% can survive between 1 and 3 months.”

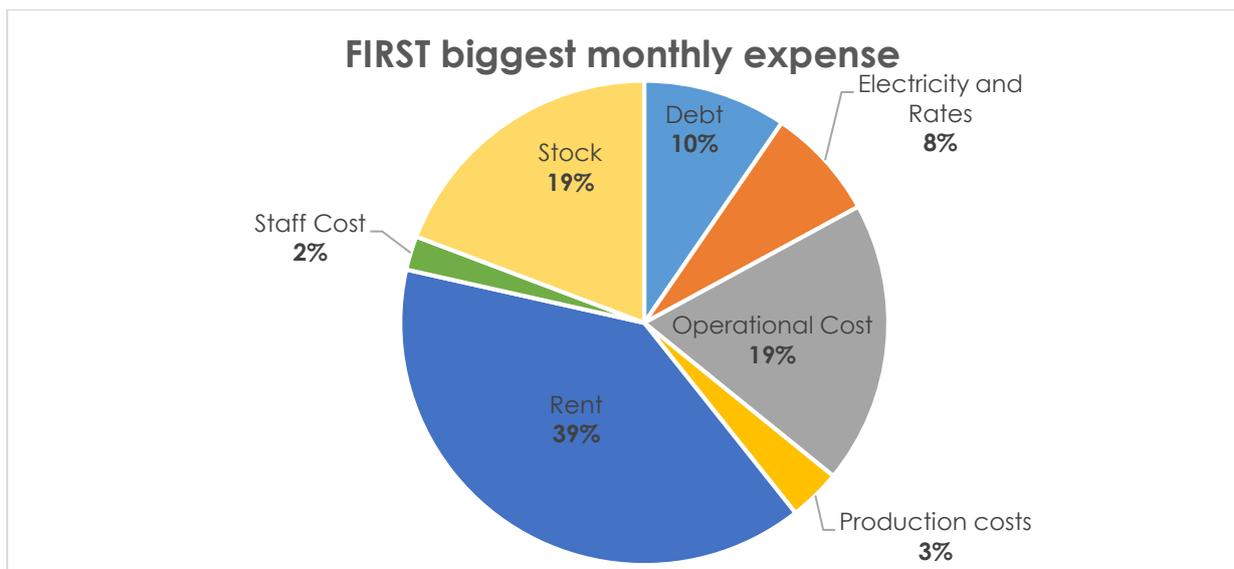
In the context of the Western Cape Business Survey 65% of respondents that they would not be able to afford their primary business expenses.



Graph 11: Most important business expense - 2131 Respondents

Many businesses will struggle to cover their most important business expenses. This will limit the working capital of businesses and it might have a long-term effect on business operations, resulting into a total closure of many, most likely small, enterprises. As well as expanding the level of unemployment.

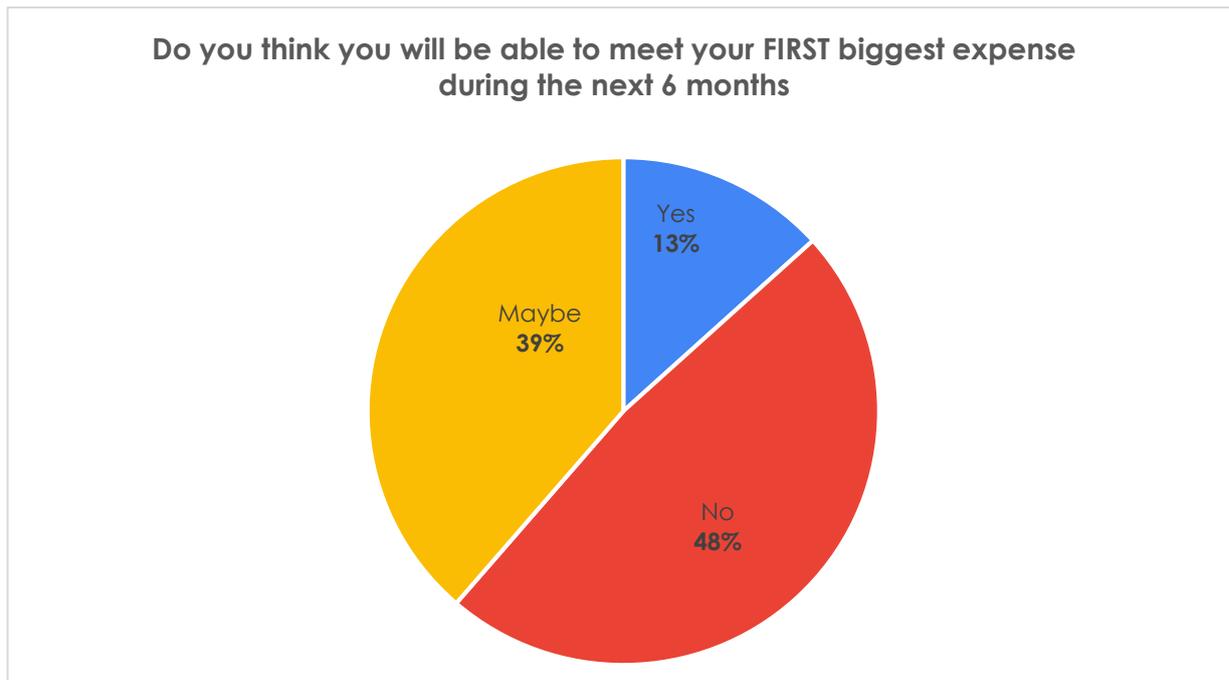
The detail of the business expenses that businesses will find challenging to service are described in greater detail below. Businesses will struggle to cover their rent, pay for stock and service their operational costs.



Graph 12: FIRST biggest monthly expense - 2078 Respondents

The biggest portion of monthly business expenses excluding wages and salaries goes to rental. Close to 40% of monthly expenses goes to rent.

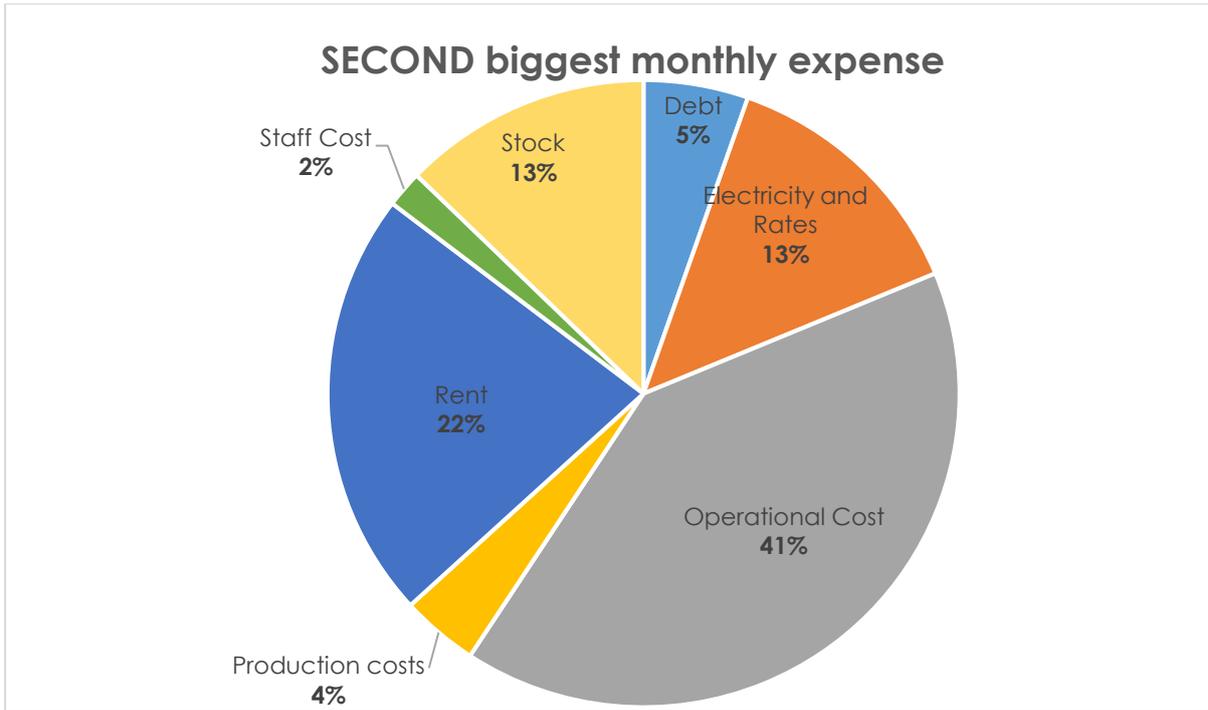
Only 13% of businesses are confident that they will be able to meet their biggest expense during the next 6 months. This highlights how few businesses have cash reserves and if they are unable to operate they are unable to meet their cost obligations.



Graph13: Perception on FIRST biggest expense during the next 6 months - 2131 Respondents

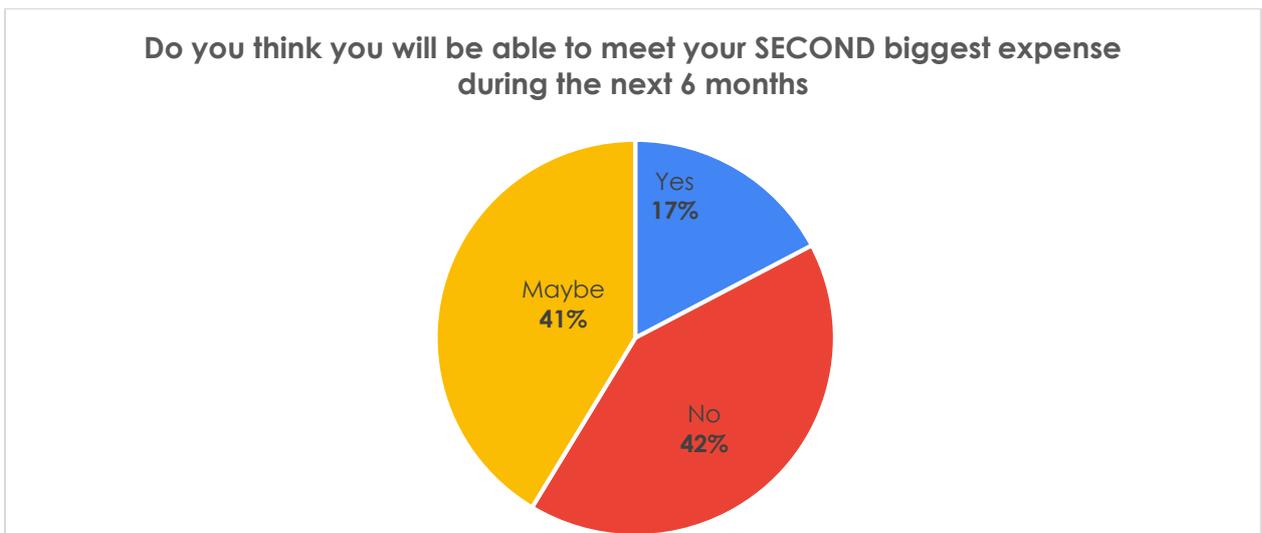
The potential devastation of businesses not being able to operate is laid bare in this graph because it reveals that 86,7% of businesses will be unable to meet their biggest expenses in the next 6 months.

The trends exhibited in the biggest business expense, other than wages and salaries, is mirrored in the profile of the second and third biggest expenses.



Graph 14: Perception on SECOND biggest expense during the next 6 months - 2071 Respondents

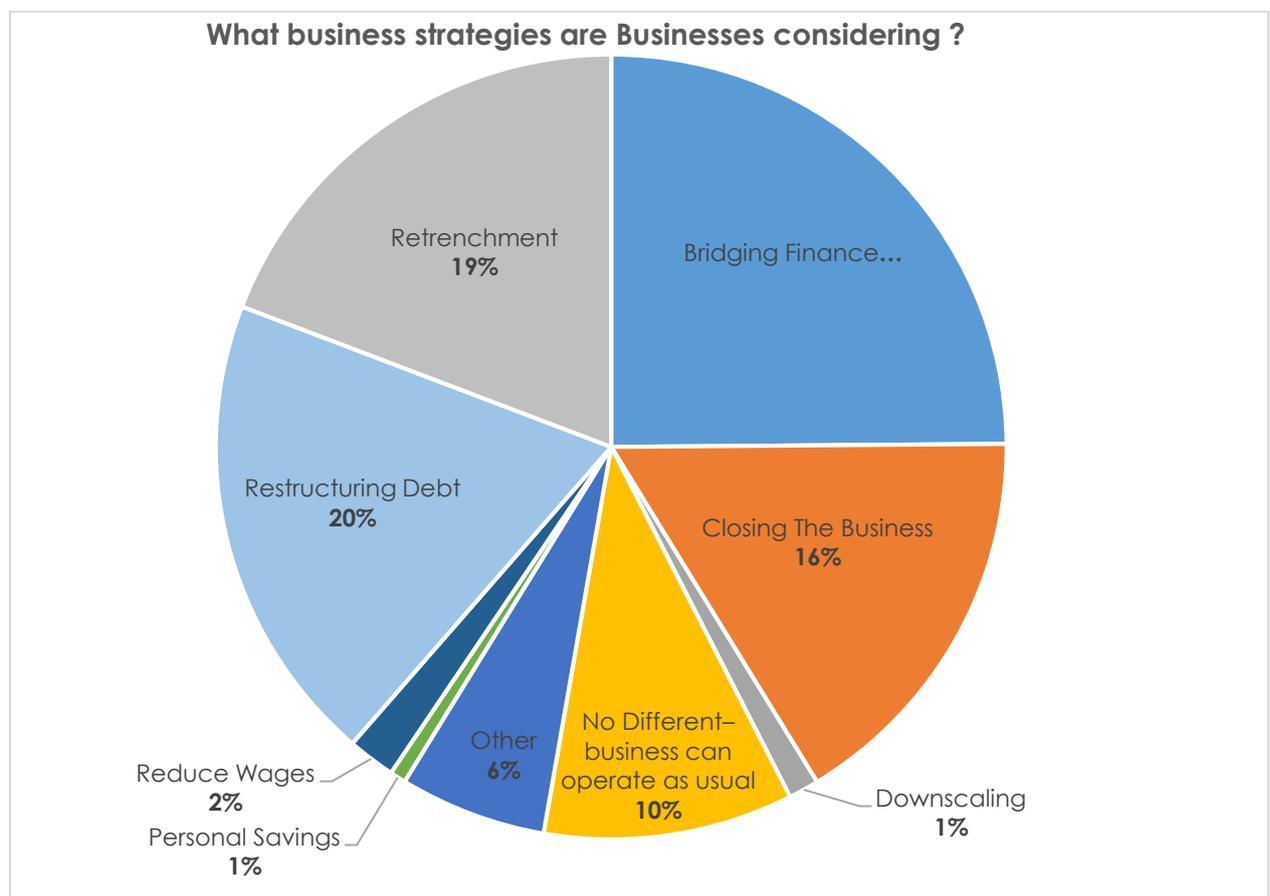
Operational costs constitute the second biggest monthly business expense excluding wages and salaries with over 40%. Rentals (over 22%) persist as the second biggest monthly business expense that businesses need to incur in order to operate. Only 17% of firms are confident that they will be able to meet their second biggest expense during the next 6 months.



Graph15: Perception on ability to meet SECOND biggest expense during the next 6 months - 2131 Respondents

83% of businesses are not sure that they will be able to meet their second biggest expenses in the next 6 months.

Financial containment strategies have been identified by businesses to deal with COVID-19. Approximately, 25% of businesses have identified bridging finance as the number one business strategy to deal with COVID-19 and over 19% opted for restructuring debt. Retrenchment has come out as the third most likely business strategy that businesses will opt for in order to help the business cope with the challenges they face in order to ensure their survival. It is encouraging that businesses will not immediately shed staff but will instead first try to generate more capital or manage their debt. However, the picture painted remains rather bleak.



Graph 16: Business strategies being considered - 3212 Cumulative Respondents

Financial containment (bridging finance and restructuring debt) are the strategies identified by businesses to ensure survival during the COVID-19 pandemic. Retrenchment is the third most likely business strategy that businesses will opt for.

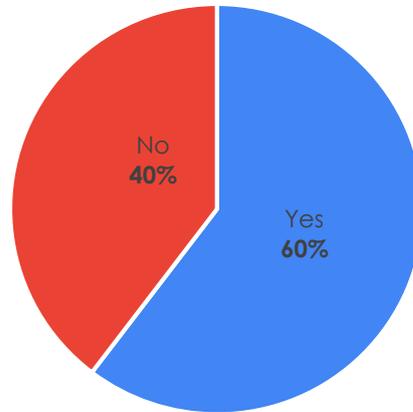
Business strategies being considered by firms to deal with COVID-19		
Options	No. of responses	% of consideration
Bridging Finance	799	25%
Closing the Business	527	16%
Downscaling	40	1%
No Different–business can operate as usual	328	10%
Other	193	6%
Personal Savings	21	1%
Reduce Wages	63	2%
Restructuring Debt	625	19%
Retrenchment	616	19%

Table 3: Business strategies being considered – 3212 Cumulative Respondents

The information presented in the preceding table also mirror the results of the STATS SA dataset whereby STATS SA found that 38% of businesses would need to rely on a Government relief scheme, 20% would require a debt relief holiday and 13% would need a small business grant or loan. This again highlights the need to provide liquidity security in some form to businesses affected thus ensuring they can bridge the lean months ahead, and be operational once the economy reopens.

STAS SA also found that in relation to strategies impacting on workers, that “28,3% [of respondents] indicated that their workforce has decreased working hours and 19,6% reported laying off of staff in the short term”. This again is mirrored in the Western Cape Survey data.

Have you informed your bank, shareholders and other important stakeholders regarding the impact of the pandemic on your business?



Graph 17: Key stakeholders informed - 2131 Respondents

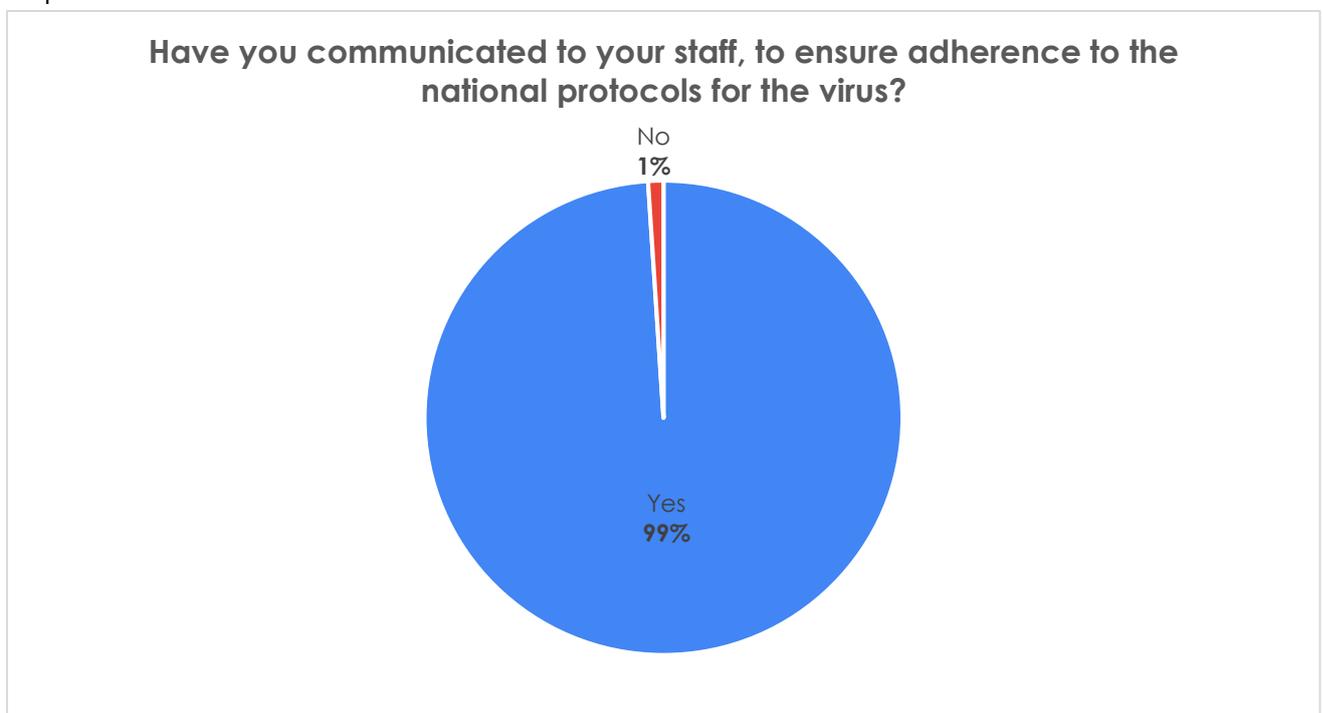
Businesses need to communicate to access support.

Given the challenges being faced by businesses it is concerning that only 60% of firms have informed their banks, shareholders and other important stakeholders regarding the impact of the pandemic on their business. There may be business support, particularly from banks, that businesses may not know that they can access. The 40% of businesses that have not communicated with their banks, shareholders or stakeholders about the impact of the pandemic on their business could improve their chances of survival if they did communicate.

4. HOPE AND SILVER LININGS IN FEEDBACK FROM BUSINESSES

The analysis reveals a bleak picture, understandably so. However, as highlighted in the introduction, even though businesses face the same storm they are not all in the same boat. There are glimmers of hope and some silver linings revealed by the feedback received from businesses.

Nearly 99% of firms are keeping their staff informed about the virus and trying to make sure that they adhere to national protocols. Whether these firms have the required monitoring mechanisms in place, is unclear but it does reveal that they are ensuring that the very basic health system (communication of information) is implemented.

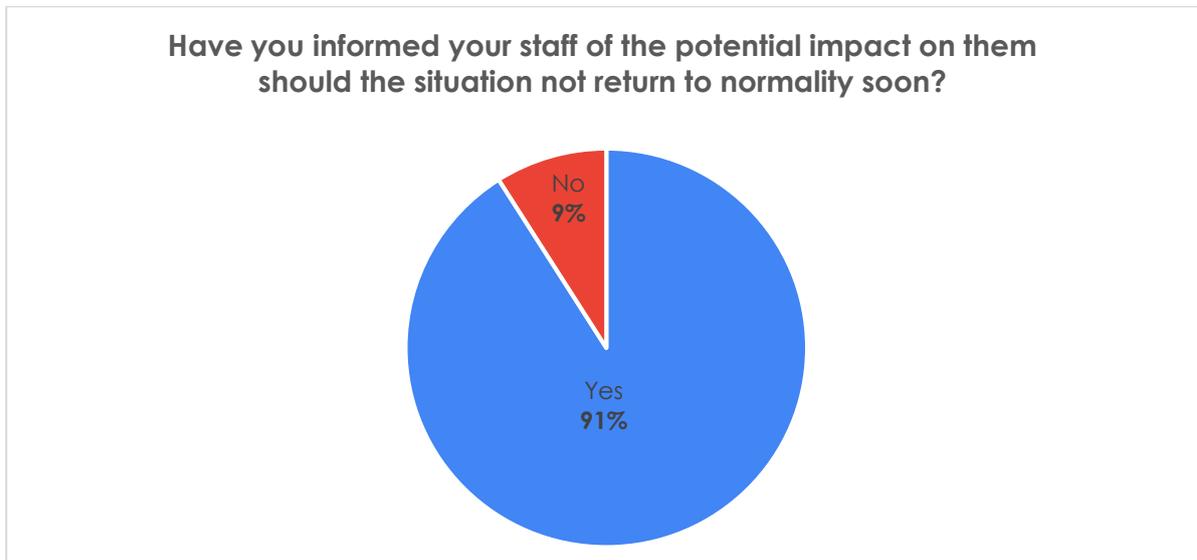


Graph 18: Communicated with staff - 2131 Respondents

Most businesses made sure to relay information about national protocols to their staff. This is very important as being informed and maintaining basic hygiene is the cornerstone of fighting against the pandemic.

Businesses are also communicating to their staff on the potential impact on them if the situation does not return to normality soon. In a context that is filled with uncertainty, anything that a business can do to try to keep their employees informed about how their lives could be impacted is good. Even if the outcomes are not ideal, and that the impact on the employee is that it could lead to retrenchments, it is arguable that it is better if employees are informed. Being informed means that employees could try to develop household mitigating

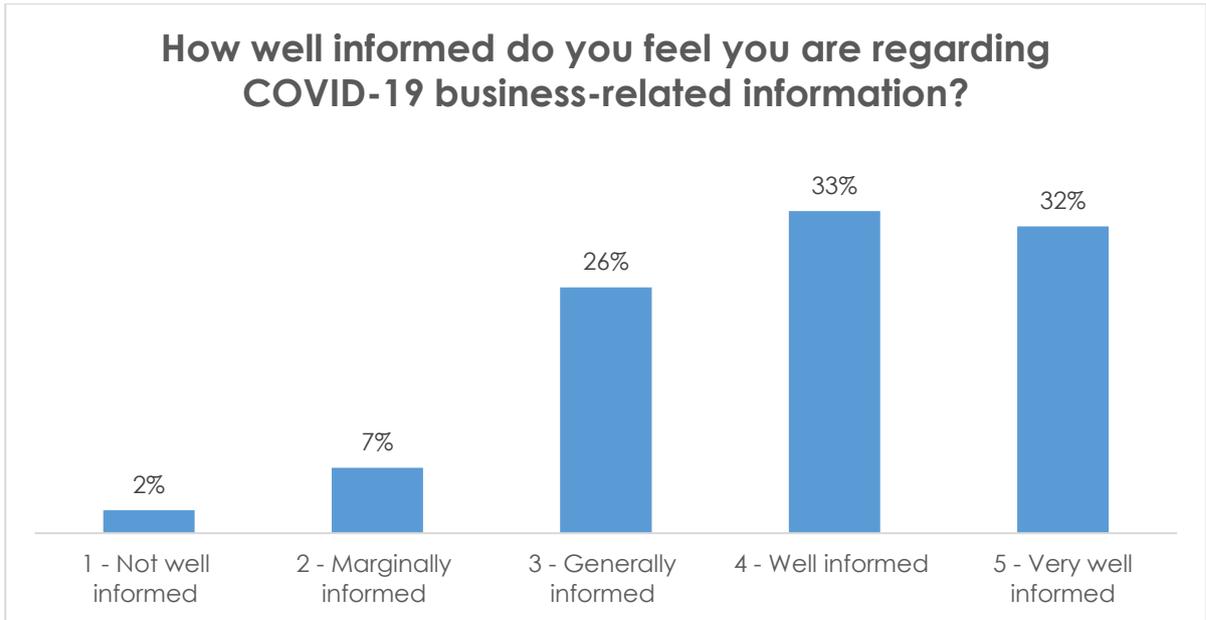
strategies in response to a loss of income. It would arguably be far worse to be “surprised” to learn that you have lost your job.



Graph 19: Staff informed of impact - 2131 Respondents

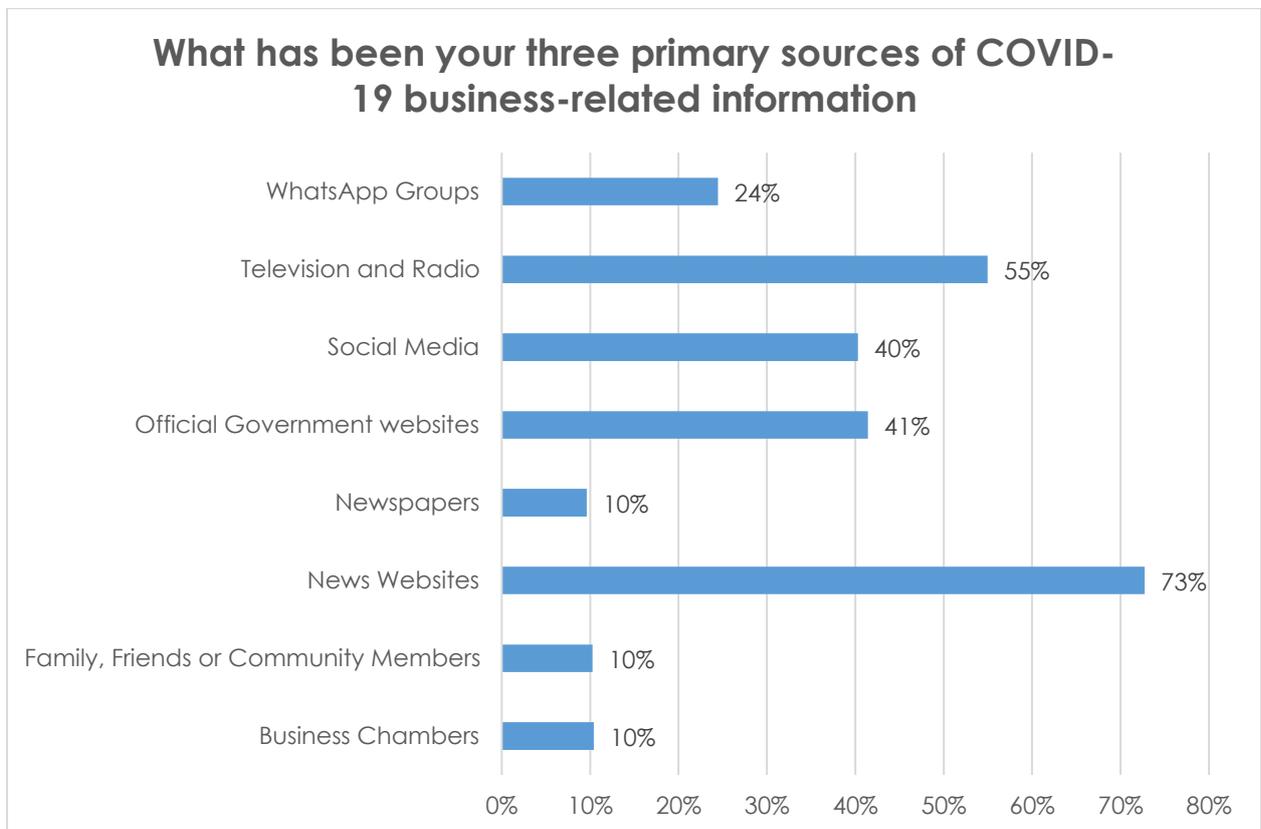
Over 90% of the businesses report that their staff are aware of the potential impact of the pandemic. Engaging with staff should allow them to understand that the pandemic is not only just a health issue but also an economic issue.

Given that businesses are sharing lots of information with their staff it is good as it shows that they are well informed about the pandemic. Only 2.4% of businesses reported that they are not well informed regarding COVID-19. With 65.3% of businesses reporting that they are either well informed or very well informed.



Graph 20: Level of awareness of business-related information - 2138 Respondents

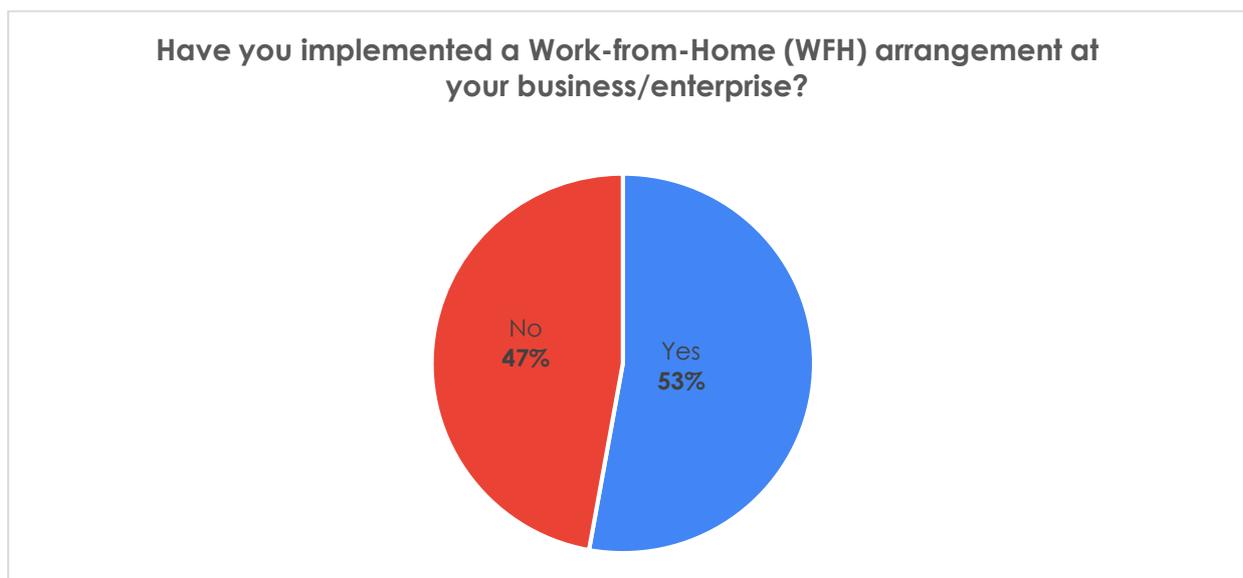
Given that businesses need to be informed in order to communicate information to their staff it is good to see that their key sources of information are reputable. This helps to minimise the spread of “false news”.



Graph 21: Primary sources business-related information- 2141 Cumulative Respondents

The three primary sources of COVID-19 business related information that businesses used to inform and enhance their thinking and decisions, have been; (1) News websites, such as News 24, Daily Maverick etc. (73%), (2) Television and radio (55%) and (3) Official Government Websites (41%).

Even though we have been thrust into a pandemic without too much time to prepare, it is encouraging that many businesses have been able to implement working-from-home arrangements. Approximately half of all businesses have implemented some form of working-from-home system.



Graph 22: Work-from-Home (WFH) implemented - 2131 Respondents

It must however be noted that not all sectors lend themselves to working from home arrangements. There are some businesses that require on-site presences as stated by a firm interviewed in the other WCG survey:

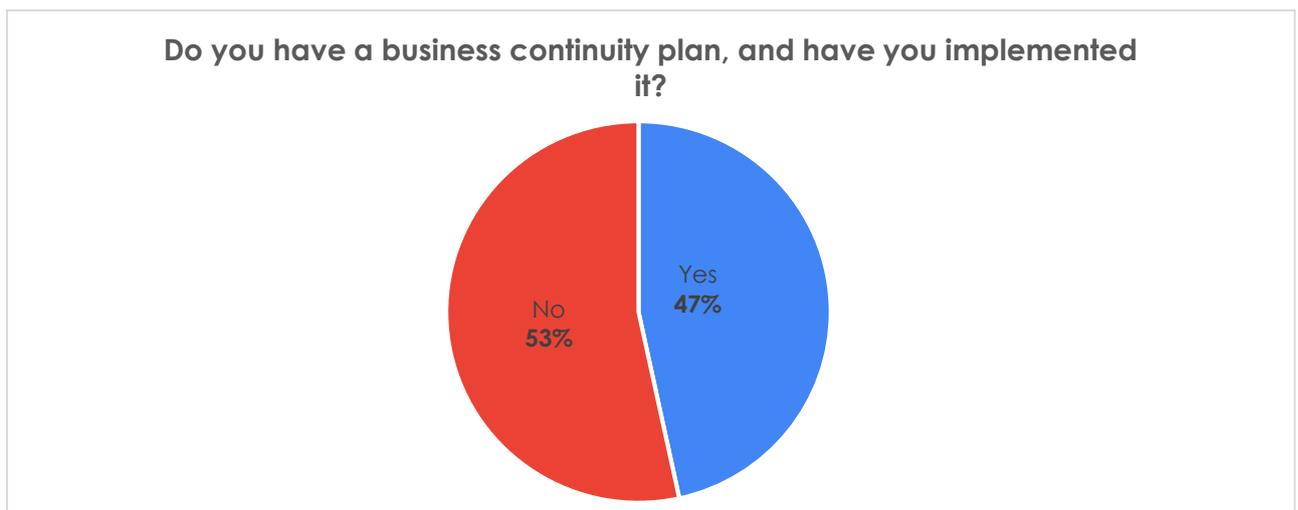
"We as the construction industry can have our office staff work from home, but the revenue gets generated on site."

This point is further reinforced by other businesses that reported:

“Not possible to operate at less than 80% of maximum capacity. Less than 3% of employees can work from home.”

Furthermore, working from home does not imply that the business can continue as usual.

A number of businesses have implemented some business continuity planning (46.6%). It is important to not over-emphasise this as being something positive because it remains challenging that 53.4% of businesses have not implemented business continuity planning. This piece of analysis falls into the silver lining category as there is a definite challenge with business continuity that should not be downplayed. However, sight should also not be lost of the fact that businesses are trying their best to navigate through the stormy waters of the pandemic.

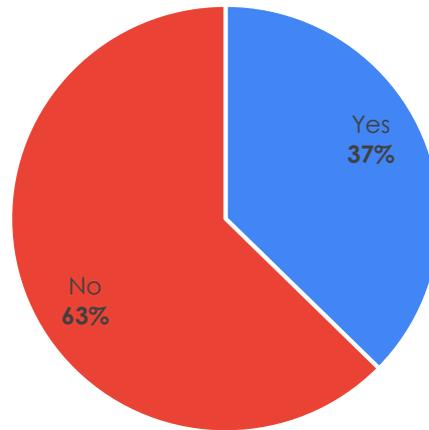


Graph 23: Business Continuity Planning - 2131 Respondents

Businesses are trying to navigate through the current challenges and ensure their survival and 46.6% of businesses have implemented some form of business continuity planning.

In planning for continuity and linked to the fact that businesses are trying to remain informed, it is encouraging that some businesses are aware of the support business webpage. Again, this is a silver lining where challenges remain, because there are still many businesses that need to be made aware of this webpage.

Are you aware of the www.supportbusiness.co.za website?

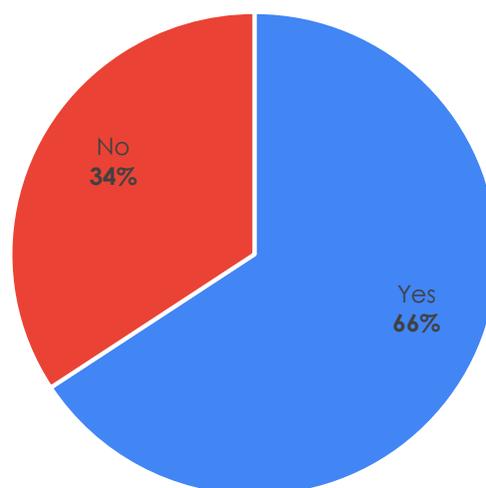


Graph 24: Awareness of www.supportbusiness.co.za website - 2141 Respondents

An estimated 37.4% of businesses are aware of the www.supportbusiness.co.za website. However, there is room for improvement in increase awareness of the webpage and business information and support available.

It is also encouraging that as businesses try to develop new business models in order to ensure business continuity, that 65.7% of businesses are interested in receiving tips and assistance with taking their business digital.

Are you interested in receiving tips and assistance with taking your business digital?



Graph 25: Greater digital access - 2121 Respondents

Two thirds of businesses surveyed are interested in receiving tips and assistance with taking their businesses digital

5. RECOMMENDATIONS

The insights gained from analysing the business survey reveal several recommendations that could help mitigate the impact of COVID-19 on business. The recommendations are the following:

Both businesses and employees need support, urgently.

- Many of the businesses surveyed are dependent on domestic demand. Although demand is, and probably will be constrained in the near future, support to stimulate demand is needed as businesses are challenged to remain operational. Particularly, businesses in the retail and trade, construction and general services sectors predict that they will generate no revenue over the lockdown period. A gradual lifting of lockdown restriction is needed;
- With no revenue coming in, business needs assistance with wage and rental bills that are accruing;
- Business needs assistance with operational cost buffers to address overheads and cashflow challenges;
- Business requires government to consider municipal utilities and tax relief or reprieves (like interim concession on carbon tax, PAYE, etc.);
- Business needs assistance to understand the implications and gain access to, support containment strategies around bridging finance and business continuity planning;
- Similarly, business needs to understand the implications of selecting containment strategies like downscaling, wage reductions, retrenchments and business closure;
- Businesses need to be encouraged to reach out to banks, shareholders and important stakeholders to learn what support may be available; businesses need to be informed about any opportunities that may exist in their sector;
- Institutions like banks, insurance companies, business chambers, etc. need to give serious consideration to where they direct appropriate support and 'put skin in the game';
- It is particularly important that businesses engage with their banks given that financial containment strategies have been identified. Support is required around issues like debt restructuring or reduce the cost of borrowing, reduction in bank fees, etc.;
- Insurance companies to consider reducing excess amounts on insurance claims; Insurance companies have been less visible in announcing support to business than the banks have. There should be an exploration to see

what can be offered; greater awareness (like that required for the banks), is needed;

- Organised business formations like business chambers and sector forums to establish working groups on innovative ways where some sectors could increase their work-from-home segment of their operations, consider online processing and/or sales;
- Existing consumer behaviour (and delivery constraints) limit expanding online sales; however, there is an opportunity for consumer education by retailers for various LSM levels. Now is the time to educate South African customers to shift shopping patterns.

Workers need support with the ability to return to work and earn.

- Easing and opening of sectors require lockdown restrictions to lift, i.e. essential needs to be redefined in an evolving manner.;
- The provision of protective wear for all workers needs to be mandatory where any new sectors or industries can operate;
- Workers need safe and sanitized public transport options;
- Workers need government support to consider minimizing short-time and retrenchments;

Government needs to protect jobs and drive recovery of the economy.

- Government needs to consider financial and non-financial support interventions and measures to assist business and employees in the above areas highlighted;
- Government needs to accelerate availability and applicability of support strategies, schemes, funding models and most importantly, access for business and workers (like secured access to UIF funding support);
- With more than 80% of respondents to the survey being SMMEs, dedicated support from government, for small business, is imperative. The survey shows that these SMMEs do not have financial buffers for an extended period of inactivity;

Greater awareness and access to information needs to increase.

- Feedback to businesses via as many networks as possible on this 'snapshot' of the two-week real time window' of the local economy;
- Communication Initiatives are still not optimally reaching businesses and increased awareness of websites hosting business information and support available, needs to occur;
- Businesses need to be fed tips and be given assistance on how they could take their business digital.

6. CONCLUSION

With COVID-19, South Africa finds itself in lockdown not only as individuals and families, but as business entities and industries too. The prospect of a very tough recovery ahead is real.

The purpose of the survey is to provide economic insight into the impact of the COVID 19 pandemic. This it delivers.

The survey provides useful insights that reveal the challenges that businesses are facing and sheds some light on what they are doing to navigate these stormy waters.

The findings of the survey mirror, results and insights that have emerged through similar assessment initiatives undertaken at both national government level (like the StatsSA's Business impact survey of the COVID-19 pandemic in South Africa) and local government level (like the City of Cape Town's Industrial Survey – Emerging Issues Report).

The survey is Western Cape-specific and with a sample size of well over 2000 respondents, represents one of the largest surveys completed in South Africa to date. Conducted under lockdown conditions, it also represents as close to real-time insight, as possible;

The intent is that Western Cape Government and its partners - municipalities, agencies, sector bodies, organised business and most importantly businesses that shared their experiences - utilises the real time information to better understand the impact of this pandemic on our regional economy, but more importantly on business. The survey offers the opportunity to economic stakeholders to gain insight into enterprise, sectoral and municipal impact areas.

The survey confirms that there is a significant role for everyone to play.

Businesses and workers need to play its role to ensure business continuity and economic resilience of their entities.

Government and all its partners need to protect workers and stimulate a more resilient economy to emerge. To do this, government at all three spheres, should position and align its initiatives to ensure effective recovery support in the short, medium and long-term is activated.

We believe that recovery is possible, but only if we remain resilient and work together.

7. BUSINESS SURVEY INFORMATION

- Graph 1: Single Site Business Response Distribution
 - Graph 2: Standardised Sector Distribution
 - Graph 3: Business Size by Employment
 - Graph 4: Number of Permanent Employees
 - Graph 5: Indicated turnover of respondents
 - Graph 6: Businesses that export
 - Graph 7: New business opportunities
 - Graph 8: Different supply sources
 - Graph 9: Business contracts cancelled
 - Graph 10: 3-Month perception forecast of business revenue
 - Graph 11: Most important business expense
 - Graph 12: First biggest monthly expense
 - Graph 13: Perception on FIRST biggest expense during the next 6 months
 - Graph 14: Perception on SECOND biggest expense during the next 6 months
 - Graph 15: Perception on ability to meet SECOND biggest expense during the next 6 months
 - Graph 16: Business strategies being considered - 3212 Cumulative Respondents
 - Graph 17: Key stakeholders informed
 - Graph 18: Communicated with staff
 - Graph 19: Staff informed of impact
 - Graph 20: Level of awareness of business-related information
 - Graph 21: Primary sources business-related information
 - Graph 22: Work-from-Home (WFH) implemented
 - Graph 23: Business Continuity Planning
 - Graph 24: Awareness of www.supportbusiness.co.za website
 - Graph 25: Greater digital access
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- Table 1: Sector reflection on revenue generation
 - Table 2: Impact of contracts cancelled
 - Table 3: Business strategies being considered