

PANDEMIC EFFECT STUDY REPORT

Exploring COVID-19's Impact on Ontario's
Women/Womxn-led Digital Media Businesses

「 PANDEMIC
EFFECT STUDY 」



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Objectives

The *Pandemic Effect: Exploring COVID-19's Impact on Women/Womxn-led Digital Media** *Businesses in Ontario* ("Pandemic Effect") study's objectives were to capture a snapshot of an unprecedented moment in time, and to identify and share crisis coping strategies from the perspective of these entrepreneurs as they navigate the disruption of COVID-19.

This report will inform women/womxn entrepreneurs, groups and support organizations, funders and collaborators alike with new insights about the gaps, challenges and opportunities women are facing within the digital media ecosystem. At this time, *Pandemic Effect* aims to shift our mindsets, putting inclusivity and gender, racial and economic parity at the fore for future discussion on policy and regulation. It builds on the feminist business principles embedded in CFC Media Lab's Fifth Wave Initiative, such as radical collaboration, socially generative models that aim for equity and liberation, and holistic resilience that takes into account the socio-economic and political contexts under which we operate.

** For the purposes of this study, Digital Media companies are technology or technology-enabled companies that provide content, services, consulting, platforms and/or products in categories including arts, entertainment, information, education, recreation, culture and immersive media.*



Executive Summary

From July through November 2020, over the course of three phases, a focused cohort of 28 women/womxn-led digital media businesses in Ontario participated in this study. The participating organizations ranged from companies formed in the past five years, to others with more than 15 years in operation. The companies are micro and small businesses, most employed 1-2 full-time workers at the time of the survey. Together, the 28 businesses employed an estimated 200 full-time employees and another 124 as part-time, contract or freelance workers in Ontario. The majority (2/3) offer digital media services and digital media content creation. The remaining third provide digital platforms and digital products.

At the time of completing the survey (roughly Sept/Oct 2020):

PRODUCTIVITY

Though one in five (21%) of respondents reported being more productive than in March 2020 (i.e., the start of the pandemic),

68% ↓

had slowed or halted their ability to develop or deliver products.



SETBACKS

About half of respondents experienced major business disruptions, including:

57% ↓

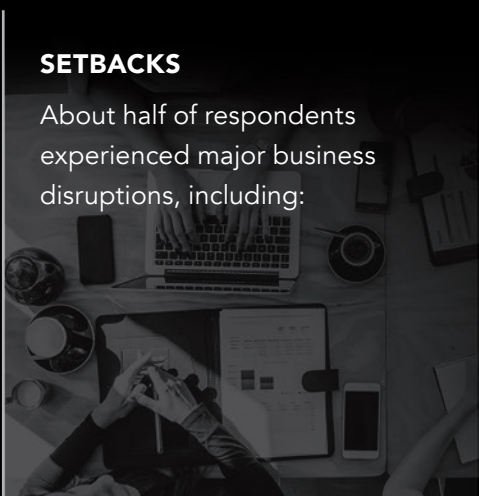
loss of business development opportunities

50% ↓

loss or cancellation of contracts

46% ↓

disruptions or delays to business



21% ↑

reported financial growth between March 2020 and the time of taking the survey in the Fall.



FINANCIALLY SPEAKING

50% of respondents described things as “fine for now” or “business as usual,” but 11% of respondents reported that they were in “dire straits” and another 18% were in survival mode, considering laying off staff.



On average, respondents anticipated a

20-month delay

in the development and delivery of their products and services.

The majority of companies reported that they had a six-month runway to cover expenses.

Ontario is home to 929 Interactive Digital Media companies according to InteractiveOntario (*Measuring Success: The Impact of the Interactive Digital Media Sector in Ontario*, 2019). The same study cites that in 2015, roughly a third (27%) of Ontario's interactive digital media workforce identified as women. Using this figure as a starting point, one could estimate that there are roughly 250 women-owned interactive digital media companies in Ontario's digital media universe. In this scenario, our sample of 28 women-owned digital media businesses represents roughly 11% of the universe. Importantly, the findings in this report are not intended to be interpreted as statistically significant.

Over the study period, we witnessed the transitions that the participants were experiencing. In the early days of the pandemic there was an explosion of response and reaction. By the time the survey went out in the Fall, trends and coping strategies had started to emerge. Shifts in priorities and the need for a 'new, no longer normal' outlook began to take shape.

A consistent theme appeared to be the value in building and maintaining a strong network where partnership and collaboration flourish. Questions emerged around the new types of partnering and what collaboration might look like in this new space and in response to the specific needs of different styles of business in a pandemic reality.

Three central themes emerged:



Business Adaptation

Respondents expressed concerns about ability to sustain or need to change core operational processes and offerings.



Social Distress

At a macro level, ranged from a landscape of uncertainty, movement toward social concerns and a wave of newly formed digital media companies to micro level of accessing financial resources and supports, managing company cultures, team structures and mental health.



Exhaustion, Change and Collaboration

Participants unanimously expressed burnout as a significant issue for them and their teams. All recognized the need to consider new collaborative configurations, partnerships, and support mechanisms.

The reality is that these business owners' circumstances continue to change and evolve as a result of COVID-19. The overarching strategies that they need will require that, as an ecosystem, we:

- Develop the concerted coordinations/mechanisms to address the challenges described by this cohort
- Invest in building resiliencies today that could help strengthen these businesses against future shocks
- Support the network connections: Build/enable partnerships and collaboration across different business models and sectors (e.g., support Fifth Wave Initiative and its work)
- Encourage opportunities for small businesses to coach the micro-businesses in a facilitated manner, while also supporting the small businesses with a more advanced level of coaching and mentorship

Women/womxn in Digital Media are leading the way forward with a multiplicity of solutions. They are demonstrating the beginning of a shift from the status quo, where the focus is on individual productiveness, to feminist-principled business, where the focus is on the collective - the contribution to the whole rather than the parts. This bold story is just the beginning.

SHIFT IN STATUS QUO

Focus is on the
collective - the
contribution to the
whole rather than
the parts.

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Acknowledgements

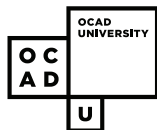
Spearheaded by CFC Media Lab as part of a response to the needs raised by the Fifth Wave Initiative, *Pandemic Effect* was designed to extend our understanding of the effects of COVID-19 on women/womxn-led Digital Media entrepreneurs in Ontario. The study was conducted with the research design and execution support by Nordicity and OCAD University's Super Ordinary Lab.

This study was funded by Ontario Creates Business Intelligence Program (BIP). Any opinions, findings, conclusions or recommendations expressed in this material are those of the author and do not necessarily reflect the views of Ontario Creates or the Government of Ontario. The Government of Ontario and its agencies are in no way bound by the recommendations contained in this document.

We are greatly appreciative of the participants who took part in the original COVID-19 strategic foresight sessions, who took the time to do our in-depth survey and who joined us in the two workshops to identify strategies for resilience as entrepreneurs and a business community.

As this work was conducted in Toronto, we acknowledge and reflect on the ancestral and traditional territories of the Mississaugas of the Credit, the Haudenosaunee, the Anishinaabe and the Huron-Wendat, who are the original owners and custodians of the land on which we stand and create.

IN PARTNERSHIP WITH:



FUNDED BY:



Approach & Methodology Background

The research was conducted over five months. From a research design perspective, it was prudent to stagger the phases of data collection, analysis, and reflection. These iterations allowed for the observation of shifts in perspective and identifying the main matters of concern to the entrepreneurs at a given moment in time.

The design of the participant engagement forums (surveys, worksheets and workshops), aimed to foster reflection and a deepening of insight. The following instruments were designed as “tools to think with” and meant to be beneficial to the participants (not just researchers):

- **Surveys** - see findings in [Phase 2](#) and in [Appendix A](#)
- **Participatory workshops** - see findings in [Phase 3](#) and in [Appendix C](#)
- **Worksheets** - see Appendices, sent as a participant thank you and incentive meant to aid entrepreneurs to continue this work within and for their own companies

This approach gave us the ability to chronicle the changing impacts of COVID over a short period of time. The research was based on Quantitative (numerical), Semi-Quantitative (where numbers represent evaluative concepts) and Qualitative (understanding and interpretation expressed as thematic concepts) data through the use of a comprehensive survey and two workshops. Our research design steps through these three forms of data collection that range from reliable (what is evident) to valid (what is understood) and coalesce on design thinking, sense making insights. The workshops dove in deeply, reviewing the rankings of matters of concern and discussing implications and strategies to address them.



Phases & Timelines



PHASE 1

Project Initiation & Key Questions

Working group shared research and literature scans on critical topics of relevance. The research team identified key questions, leading from the findings and discussions during the Fifth Wave Initiative's March 2020 "[Navigating the New Normal](#)" webinar series.

PHASE 2

Survey

Project team designed and distributed an online survey to women/womxn-led digital media entrepreneurs in Ontario. The survey asked participants to rate a series of issues according to the degree to which that issue was having an impact on their ability to run their business amid COVID, both now (Fall 2020), and if that issue were to persist for three years.

PHASE 3

Interactive Workshops A & B

With the critical issues ranked by impact, survey participants were invited to form working groups to explore the issues in more detail and identified potential coping strategies.

New pandemic effect issues were identified.

Deep dives on selected impacts created a discussion on the nature of the force, and strategies were identified and ranked according to impact and effect.

PHASE 4

Synthesis & Report

The project team synthesized all lines of research and highlighted key coping strategies.



PHASE 1

Project Initiation & Key Questions

JULY - AUGUST 2020

In this phase, Nordicity and OCAD University's Super Ordinary Team worked with CFC Media Lab to review and confirm the project's key objectives and workplan. The team identified the following broad research questions, all positioned within the context of COVID-19:

- Have these entrepreneurs had to adjust values and principles (e.g., equity) as they run their businesses? How have they retained and deepened those values?
- What tangible and intangible pressures on women/womxn entrepreneurs have been exacerbated at this time?
- What internal and external challenges have women/womxn entrepreneurs been facing over this time?
- What are the radically different work/life challenges?
- What supports were available to women/womxn entrepreneurs? What programs could they access? What supports could they not access but needed to?
- What strategies have been employed by women/womxn entrepreneurs to survive and thrive since March 2020?
- How can feminist business principles be used to mitigate the effects of COVID-19?

These questions would help to identify the key trends and drivers presented to respondents in the initial survey in Phase 2. The results of that survey would help to stage the facilitated sessions in Phase 3.

Alongside the key research questions, the discussions during the CFC Media Lab's Fifth Wave Initiative's "[Navigating the New Normal](#)" webinar series (March 2020), helped to inform the literature scan on critical topics of relevance for women/womxn entrepreneurs in digital media. Next, the Super Ordinary Team identified a series of COVID-19-related trends and drivers and arranged them according to a STEEP+V framework. The list below provides examples of patterns of change alongside their STEEP+V category:

- Physical distancing → Social
- Data transfer needs → Technological
- Unstable cash flow → Economic
- Digital carbon footprint → Environmental
- Social inequity → Values

While some readers may allocate trends/drivers to different STEEP+V categories, those presented are consistent with how they were presented to survey respondents.

The full list of trends and drivers included in the survey is available in [Appendix C](#).

TRENDS, DRIVERS & STEEP+V:

Throughout the report, readers will see the terms **STEEP+V** and **Trends and Drivers**. These terms are defined as:

- **STEEP+V:** Trends are identified and sorted through this horizon scanning tool that helps parse and sort trends into clear categories. These categories are: **S**ocial, **T**echnological, **E**conomic, **E**nvironmental, **P**olitical and **V**alues.
- **Trends & Drivers*:** Roughly speaking, drivers represent large disruptive forces, or patterns of change that affect the context within which we - or in this case, women/womxn entrepreneurs - operate. Drivers typically span many or all aspects of the STEEP+V categories of change. In the context of this report/exercise, it is not overly necessary to distinguish between a trend or a driver, as the difference between the two is never absolute and depends on the context.

* Further definition is provided in [Appendix B](#)

PHASE 2

Survey

AUGUST 31 - OCTOBER 27, 2020



APPROACH AND RESPONSE

The survey to a focus group of women/womxn entrepreneurs in Ontario was designed with two key components:

Section One - Respondents' Profile: This section focused on understanding the positioning of the participating organizations amid COVID-19 and asked about key attributes such as age of business, digital media specialization, size, and select business health indicators.

Second Two - Trends and Drivers: This section presented respondents with the series of COVID-19 Pandemic-related trends and drivers (organized by STEEP-V category) and asked respondents to select or rate the degree of impact that trend or driver had on their businesses in the present (Fall 2020), and three years into the future, if COVID-19 conditions were to persist. Respondents rated each force of change on a scale from, "Not Applicable", "No Impact", "Some Impact" to "Large Impact."

We balanced the need to survey the wide range of pandemic effects (central to participants) with survey length and involvement (demand on participants). We asked participants to consider the immediate state of their businesses and to estimate the potential pandemic effects, concerns and disruptions over time - the near-term future (3 years). The combined responses resulted in a preliminary ranking of the drivers and trends having the greatest impacts on respondents' businesses.

RESPONDENTS' PROFILE

While the sample size of respondents is relatively small at 28 firms, this focused group represents many years of experience and a diverse set of focus areas, from digital media services to content creation and platform development.

The participating companies:

- Are micro- and small-sized businesses: Two-thirds employ 1-2 full-time workers. Overall (as of Fall 2020), these 28 firms employ an estimated 200 full-time and another 124 as part-time, contract or freelance workers in Ontario.
- Range in age from new firms formed in the past five years (64%), to some with more than 15 years in business (14%).
- Have a range of specializations. The majority (2/3) offer digital media services and digital media content creation. The remaining third provide digital platforms and digital products.
- Had, at the time of the survey in Fall 2020, maintained their employment levels since March 2020.
- Were deeply concerned about cancelled contracts and a lack of new business. About half had experienced loss of business development opportunities (57%), loss or cancellation of contracts (50%), disruptions or delays to business (46%).
- Financially speaking:
 - 18% were in survival mode, considering laying off staff, while 11% of respondents reported that they were in “dire straights”
 - Half (50%) of respondents described things as “fine for now” or “business as usual”
 - The remainder (21%) reported financial growth between March and taking the survey in the Fall 2020
- Anticipated, on average, a 20-month delay in the development and delivery of their products and services. On average, companies reported that they had a six-month runway to cover expenses.

These findings are covered in more detail in [Appendix A](#).



TRENDS AND DRIVERS

Twenty-two Trends and Drivers were identified from the survey data as the top issues facing women or womxn-led digital media businesses in Ontario. These were all trends and drivers that had significant movement over the present to 3-year timeline.

Drivers: All 6 identified drivers were considered of high concern and impact now and into the future.

- Funding Uncertainties
- Awareness of Social Inequities
- Supply Chain Disruption
- Surging Unemployment
- Physical Distancing
- Misinformation

Trends: All social, technological and values trends stayed in the top ranks. The following economic, environmental and political trends remained in the top concerns.

In Phase 3, these preliminary findings are used to inform the workshop sessions, where discussing these impacts of change with attendees helps to gain a deeper understanding of these trends and drivers as the COVID timeline progresses.

SOCIAL	<ul style="list-style-type: none"> • Loss of Work/Life Boundaries • Increased Stress and Mental Health • Caregiving for Dependents • Increased Focus on Local Community
TECHNOLOGICAL	<ul style="list-style-type: none"> • Remote Working • Workplatform Proliferation • Criticality of Internet Access • Data Transfer Needs
ECONOMIC	<ul style="list-style-type: none"> • Cash Flow Instability • Business Model Adjustments • Inability to Access Some of the Subsidy Supports • Precarious Work
ENVIRONMENTAL	<ul style="list-style-type: none"> • Digital Carbon Footprint
POLITICAL	<ul style="list-style-type: none"> • Rapidly Changing Government Policies
VALUES	<ul style="list-style-type: none"> • Anti-feminist Backlash • Rising Racism • Anti-racist Awareness • Need for Reconciliation

The full list of trends and drivers included in the survey is available in [Appendix C](#).

TRENDS AND DRIVERS

To assess the respondents' ratings of trends and drivers, the team first tallied the total ratings and divided that figure by the total number of responses (i.e., 28) to get the mean average or "score" out of three. For the purposes of this report, the closer to 3, the higher the impact of that trend/driver, as assessed by all respondents. In other words, an average score below 1 indicates "No Impact", between 1 and 2 indicates "Some Impact", an average score between 2 and 3 indicates "Large Impact."

The initial assessment showed that entrepreneurs anticipated that if COVID-19 conditions persisted, they would have to weather the impacts of a greater number of disruptive changes:

- Between Fall 2020 and three years into the future, the average overall rating rose from "Some Impact" to "Large Impact".
- This rise is due in part because the number of trends/drivers rated by respondents as having a "Large Impact" (overall average score above 2) also rose over the same period from 11 trends/drivers to 17.

The following page will show the shifting priorities of each time period by comparing the top 10 trend/drivers from Fall 2020 and in three years time.

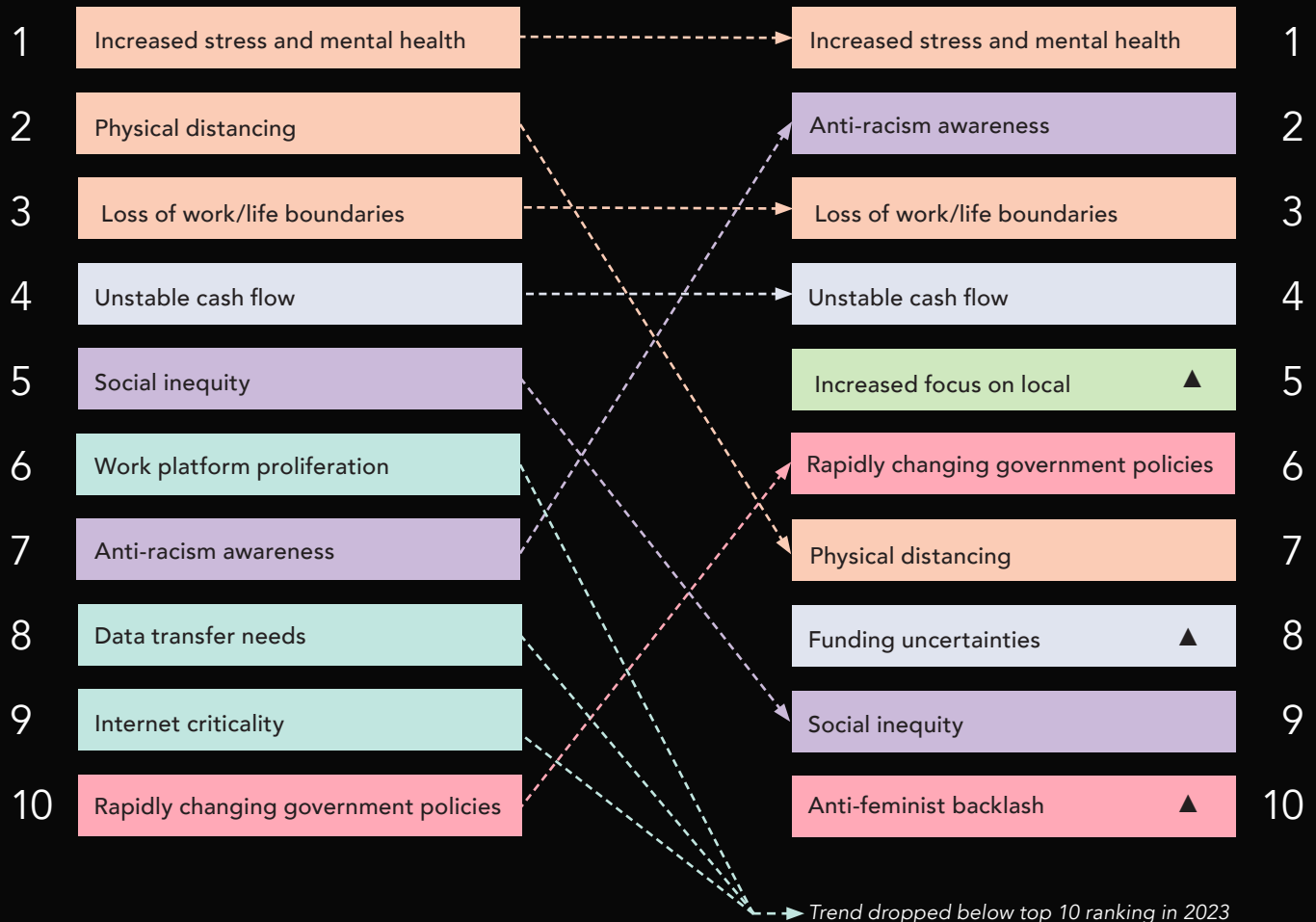
TRENDS AND DRIVERS - RANKING NOW AND IN 3 YEARS (TOP 10)

Below is a ranking of the top impacts from the time of the survey data and the respondent's 3-year future projections if COVID-19 was to continue. Impacts coming down in priority might be a sign of others taking priority - or - may indicate that the companies expect to have already dealt sufficiently with it within the 3-year window.

STEEP+V: Social Technological Economic Environmental Political Values

2020

RANKING



TRENDS AND DRIVERS - OVERALL IMPACT

Alongside the shifting priorities, we noted that some trends/drivers had a consistent impact score or rating, despite a drop in ranking. This effect shows us that even though overall impact priorities may have shifted from today to the future, that trend/driver itself is still independently weighted to be high impact (e.g., social inequity).

For example, there was a subset of trends and drivers that dropped in overall ranking (relative to other forces of change) between today and 3 years into the future, but for which the impact score was constant, or even rose. In other words, the trend/driver may hold just as much impact or potential to disrupt in the future. This escalation suggests that overall, the respondents believe there will simply be more trends/drivers (or forces of change) to manage, should current COVID-19 conditions persist for three years.

Examples of such trends/drivers that may have dropped in ranking, but not in mean score - and so should not be interpreted as having any less disruptive potential in the future - include (and would be perilous to ignore or view as "resolved"):

- "Social Inequity", "Business Model Adjustments", "Precarious Work" and "Criticality of Internet Access" drop in ranking, but impact scores rose
- "Work Platform Proliferations" drops in ranking but impact score stayed constant

BUSINESS DISRUPTIONS

About 50% of respondents reported that they were deeply concerned about cancelled contracts and a lack of new business.



PHASE 3A

Workshop 1 - Impacts & Strategies

OCTOBER 28, 2020

Building out from the trends and drivers identified in Phases 1 and 2, 10 business owners from the focus group convened to collaboratively assess the trends and drivers, consider what had changed with their businesses, dive deeply into four key trends or drivers and identify new strategies.

WORKSHOP GOALS

- To engage the group in dialogue to further refine understanding of COVID on their businesses
- To identify strategies for dealing with top issues from COVID
- To rank strategies according to impact and effort
- To identify supports for these strategies

TRENDS/DRIVER REVIEW

The workshop began with the participants reviewing the trends/drivers identified from the survey and identifying any new trends/drivers that might be affecting their businesses since the pandemic had progressed.

Next, each participant selected the top 4 trends/drivers that had been affecting their businesses during COVID-19 (*the number of votes are listed below the trends in the image below*).

Eight new trends were identified by the participants in this session. These trends show us how concerns are changing quickly as time passes and the pandemic continues. These evolving trends are:

- An unclear and unstable opportunity space
- Adapting HR to new needs and times
- Digital Gold Rush, flooding of new entrants to the space
- Societal distress
- Increased unrest/crime
- Recession: economic contraction
- Extreme homelessness and poverty
- Climate chaos



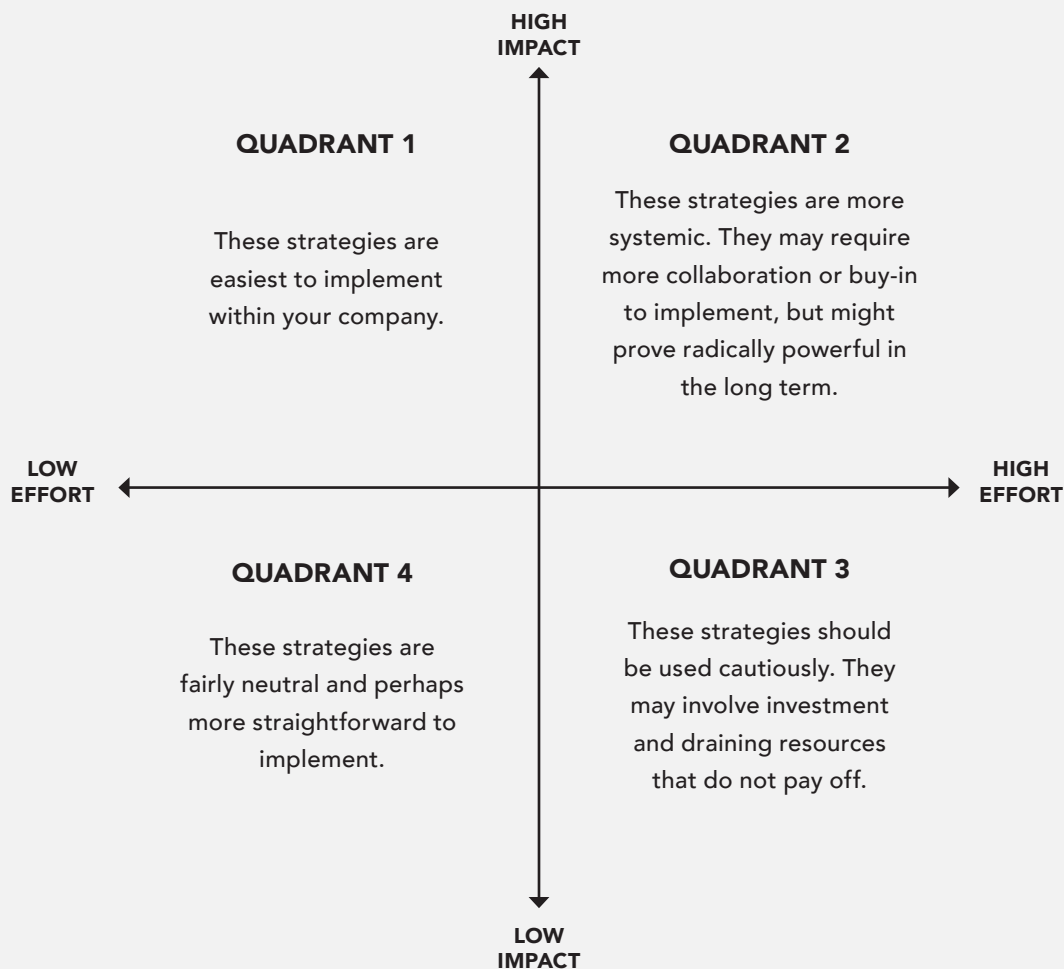
WORKSHOP 1 - DESIGN GROUP STRATEGY SESSION

After discussing the top trends that were affecting their businesses due to COVID, the attendees were split into two breakout groups to identify strategies that might address some of the problems their businesses were facing in light of the top trends.

One group chose 2 trends from the initial list of trends identified from the survey data: **Focus on Local** and **Business Model Adjustment**.

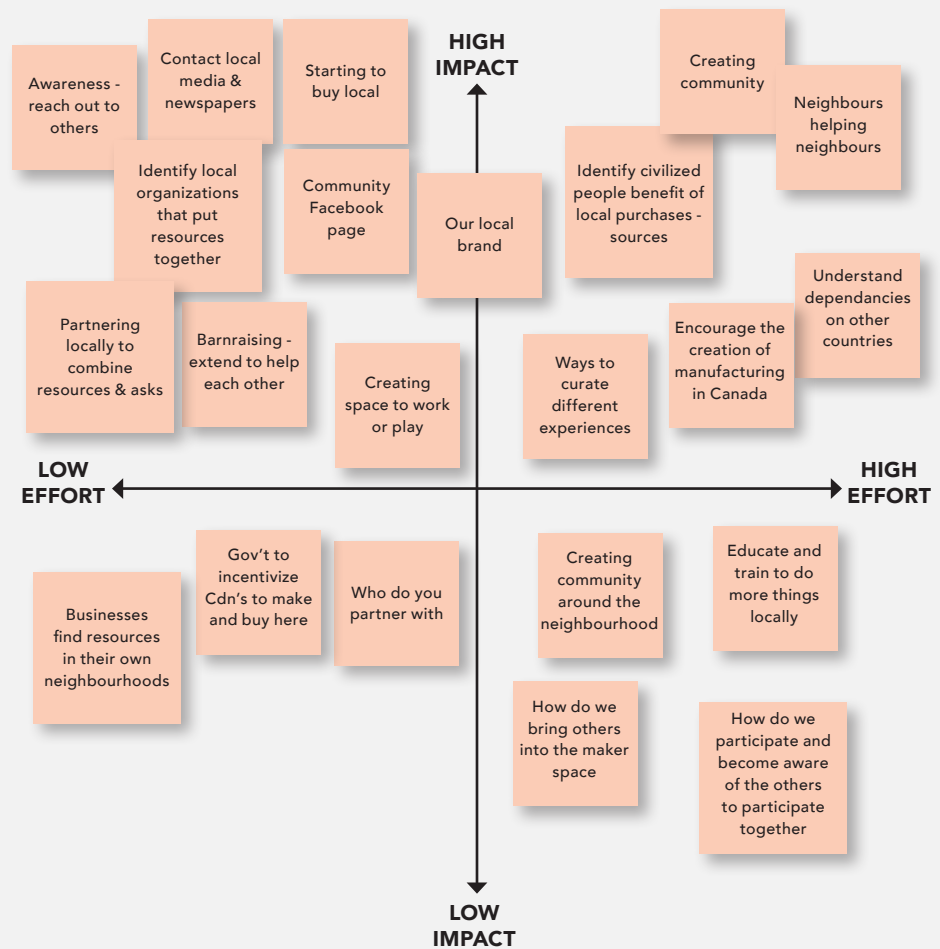
The other group chose 2 new trends that were added during the first part of the workshop: **Unclear & Unstable Opportunity Spaces** and **Adapting HR to Changing Needs & Times**.

Each group produced strategies to tackle each trend and placed them on a grid according to the level of effort, from low to high, that might be required to implement these strategies. The placement in these quadrants helps to assess the degree of robustness or ease of implementation for these strategies. There is a demand for high effort but high impact strategies that often require support beyond an individual business, through cross-organizational discussions, sectoral consideration and policy changes.



STRATEGY SESSION BREAKOUT

FOCUS ON LOCAL



COMMENTARY

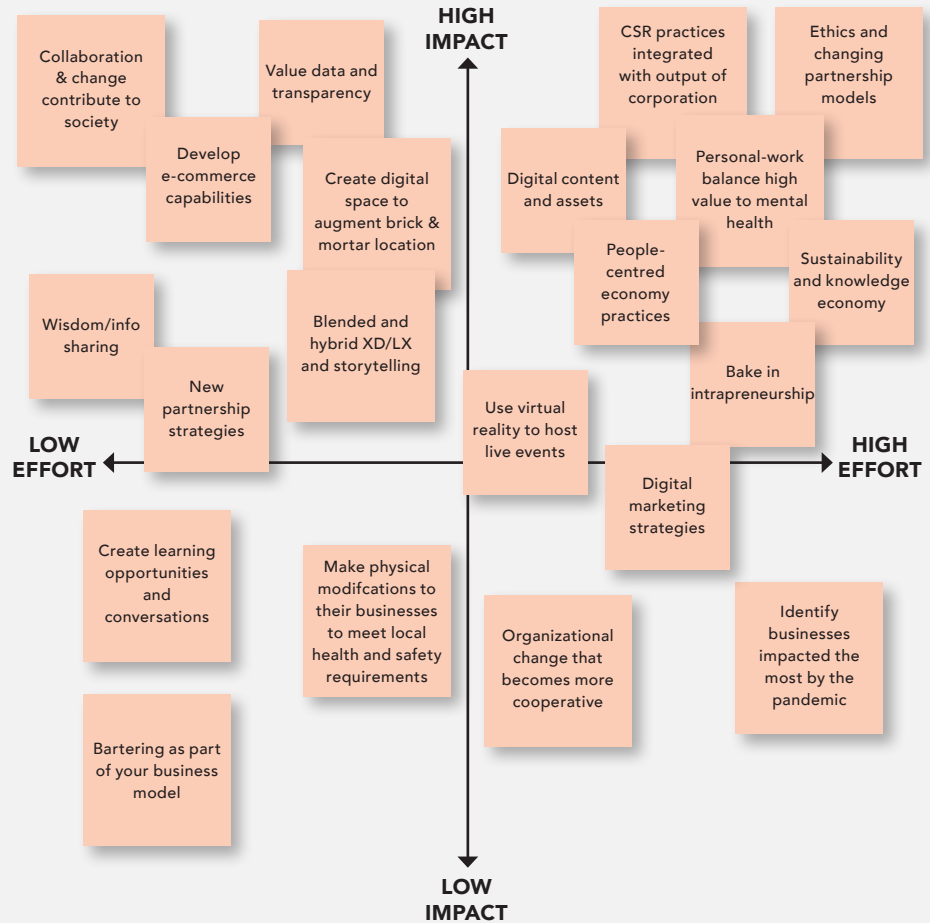
The "Focus on Local" trend is much more than just accessing business and services, it is about being aware of what is going on, who is in need, and how you can help. Stories of sharing with neighbours who didn't know each other and reached out to help, paying attention to the needs of others, and a desire for connection are things we are aware of now more than ever. "Focus on Local" is about creating and participating in community and connecting local brands through storytelling.

Strategies included:

- Develop an awareness - what is going on, who might need help.
- Participation is critical - this is how we make community happen.
- Pandemic has made it very clear people want to connect.
- Focus on ways to curate different experiences.
- Promote benefits of sourcing and serving locally.

STRATEGY SESSION BREAKOUT

BUSINESS MODEL ADJUSTMENT



COMMENTARY

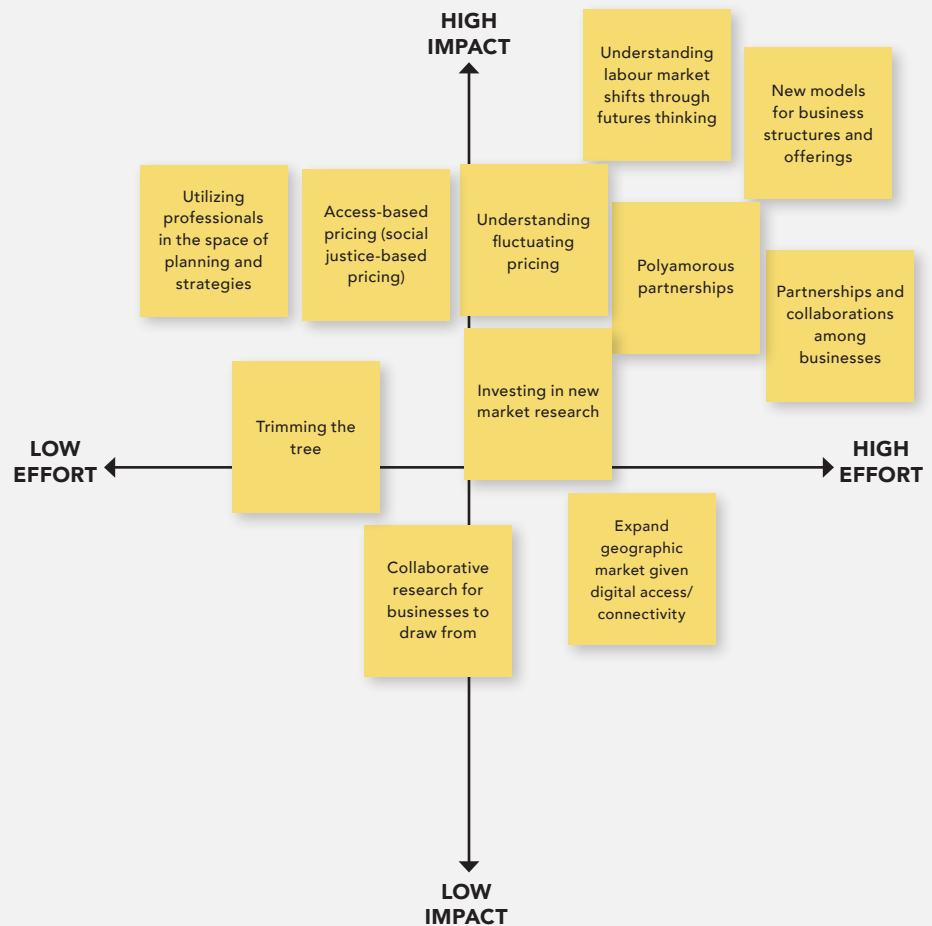
As business models shift their focus from production to resilient & regenerative community contributions, barter, access to community, wisdom sharing, and the people-centered economy grows. Businesses that encourage intrapreneurship and actively integrate their CSR principles contribute to work/life balance. As a result, we have hope for the future.

Strategies included:

- Collaborate both internally and externally to help struggling businesses, solve problems, and innovate.
- Co-collaboration may help to take on world challenges.
- Find a balance between transparency and confidentiality in business partnerships.
- Focus on knowledge economy.
- Responsible business translates into for profit and for purpose; focus on purpose first and profit will follow.
- Move ethics to the forefront.
- Storytelling is a new approach to branding.
- Focus on mental health.
- Be intentional and participate in society and (local) community.

STRATEGY SESSION BREAKOUT

UNCLEAR & UNSTABLE OPPORTUNITY SPACES



COMMENTARY

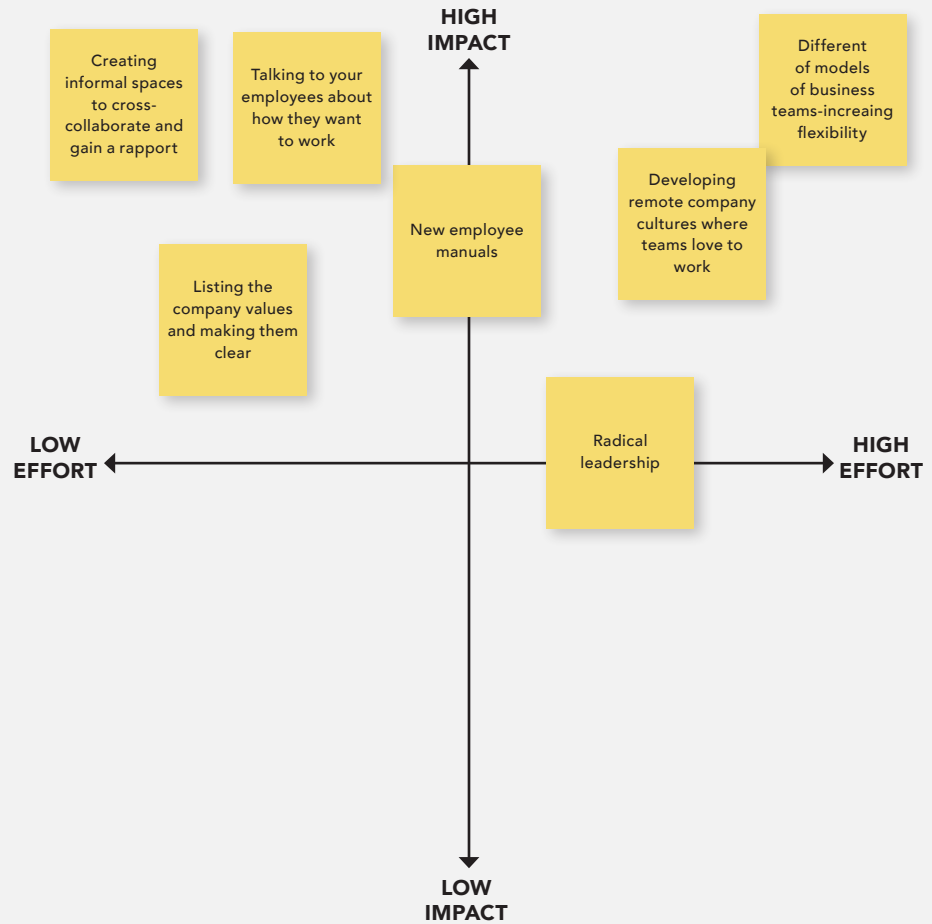
The digital space has exploded since most in-person business has ceased. There is more competition and an influx of new players, some with less expertise. The changing market has created new opportunities for everyone in the digital space, but it is unclear what actions will make the biggest impact. The group was focused on high impact strategies with a consensus among the participants that this is a high effort time.

Strategies included:

- Consider new models for business structures and offerings.
- Create expansive systems of partnership and polyamorous partnerships - using the strengths of many partners to contribute to a common goal that might lead to more beneficial outcomes and less burden on each partner.
- Understand labour market shifts through futures thinking.
- Invest in innovative, responsive and timely market research.
- Think about new access- (social justice) based pricing that might allow for new markets to come to the fore.
- Lean on professional partners that have extensive expertise in rolling out planning and strategic foresight.
- Get rid of extraneous systems that may not be working in the current climate.
- Use the expanded online-everything market to find new partnerships and clients that are not limited by geography.
- Create a pool of collaborative research for many businesses to draw from and use in their planning.

STRATEGY SESSION BREAKOUT

APDATING HR TO CHANGING NEEDS & TIMES



COMMENTARY

The new work from home (WFH) model has generated a lot of unanswered questions. There is a real need to rethink and remodel the approach to human resources, especially with small companies. Other key issues that surfaced were: understanding the liability of working from home, how to successfully onboard new employees, how to ensure connection and camaraderie within the team.

Strategies included:

- Use new models of working to allow for more flexibility in how work is completed.
- Develop a remote work company culture that employees want to participate in.
- Practice radical leadership; don't be afraid to employ very out of the box, innovative management tactics.
- Create new employee manuals for onboarding and updating current employees on protocols and values.
- Ask your employees about what issues are affecting them most and how they want to work.
- Use informal gatherings to help with cross-collaboration and rapport among coworkers.
- Review and restate the company values and make them clear to the team.

SUMMARY OF WORKSHOP 1 - IMPACT & STRATEGIES

This workshop revealed that there were some new issues affecting the focus group businesses since the original survey had been distributed in the months prior. These included: how HR policies needed to be adapted to reflect the work from home landscape, and the digital gold rush of entrepreneurs flooding the space with services and online stores.

Three key strategies that came up in the breakout groups consistently were the need for:

- Collaboration
- New partnership models
- New business models

The most common theme that came up as a throughline in the sessions overall was the social impact of the stress levels these business owners and teams were working under. Mental health impacts on them and their teams are real and all are in need of support.

STRESS ON WELLBEING

Mental health
impacts on
entrepreneurs
and their teams
are real and all
are in need of
support.



PHASE 3B

Workshop 2 - Deepening & Feedback

NOVEMBER 16, 2020

In this one-hour follow-up workshop, a focus group of 10 companies participated. It was designed for deepening and feedback. The research team reported on the key takeaways from the first workshop, reviewed the strategies and identified supports needed to implement the high effort and high impact strategies for the four forces identified, reviewed the trends and drivers from the survey and previous workshop, and requested that the participants identify any new trends and drivers affecting their businesses.

WORKSHOP GOALS

- To engage women/womxn entrepreneurs in dialogue to further identify, refine, understand and monitor trends and drivers impacting them
- To review top issues and strategies developed in Workshop 1 to see if they still applied
- To identify supports for strategies identified in quadrant 2: High Effort & High Impact for one trend/driver that was most impacting them now

WORKSHOP 2 - DESIGN

TRENDS/DRIVER REVIEW

The participants identified existing and new concerns from the unfolding pandemic since the last workshop and re-ranked the key trends and drivers to be monitored.

On the right are the participant-identified trends from Workshop 2. This session provided a noticeable explosion of new issues that reveal themselves as the COVID-19 timeline wore on. "Stress on Mental Health and Wellbeing," which was a top trend in the previous sessions, had progressed into "Burnout," as this Workshop revealed. As in the first Workshop, the participants ranked their top 4 concerns for their businesses (*the number of votes are listed below the trends in the image below*).

Below are the top new trends identified by the participants:

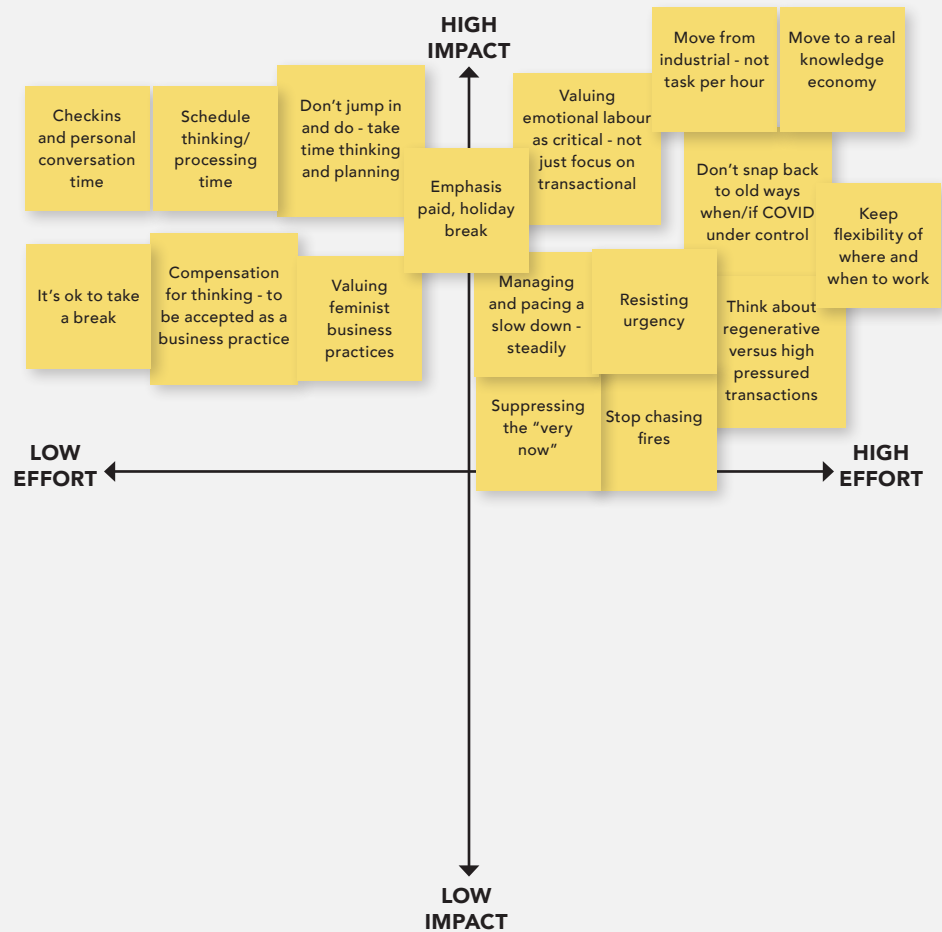
- Burnout
- Bar too high for small businesses
- Creating alternate forms of added income
- Loss of exercise and staying healthy through activities
- Engagement with information has changed - what are the rules and accountability?



A snapshot of the trend/driver board created in Miro from the second workshop. These are all of the new trends created by the workshop participants.

WORKSHOP DESIGN: STRATEGY SESSION WORKSHOP 2

BURNOUT



COMMENTARY

Burnout was the unanimous concern in Workshop 2. Participants noted that team members need additional communication: one-on-one calls - not just about work or tasks - but to check in on how things were going in their lives. They identified the need for more social time, which had been eliminated with the nature of online work. They noted that spontaneous and organic regular gatherings that happened when working under one roof had been lost and was having an impact.

They spoke to the need to remember that not all conversations should be transactional and that there was a lot more emotional labour for founders. Empathy in the workplace was found to be more important than ever.

Strategies included:

- Change mental models away from an industrial revolution framing of extracting transactional value from employees. A real knowledge economy would focus on the care and wellbeing of its workers.
- Value emotional labour as critical to the business functioning.
- Resist the temptation to respond to requests as urgent, when they may not need emergency attention.
- Slow down the pace of business in a more managed but sustainable manner.
- Encourage and pay people to take breaks.

SUMMARY FROM WORKSHOP 2

Several drivers and trends carried through over the course of the Study.

Many of the participants found that the bar was too high for the micro businesses to qualify for governmental supports, but expressed the need for help. Business models needed to adapt, processes and operational structures were needing to evolve. New forms of partnerships and revenue streams were all under consideration while trying to consider all of these with an ethical lense. Competition from a rush of new micro businesses in the digital space was a threat. All were looking to solutions to keep employees/teams in place and engaged and to evolving their corporate cultures.

The overwhelming trend in Workshop 2 was "Burnout." All the participants were feeling the weight of mental stress, conflicting or changing information, managing being isolated and being online continuously. Productivity was slowing down - for business owners, their teams, and their partners or clients. Stress is causing more stress, as people feel a downward spiral that needs collaboration to think through and rethink what to expect from or how we should work.



INCREASED EMOTIONAL LABOUR

Empathy in the
workplace was found
to be more important
than ever.



PHASE 4

Synthesis & Report

NOVEMBER 2020

Over the course of the *Pandemic Effect* study, the demands on Digital Media entrepreneurs in Ontario in this rapidly changing landscape emerged. The findings focus on the importance of continual monitoring, but also the need for resilience. Reaching out to others both informally and through new business model relations were repeatedly emphasized.

- Maintaining and supporting local and other network connections as further business adjustments, such as HR strategies, will require ongoing attention.
- Continuing to take a pulse on the effects of the pandemic and making sense of the forces of change and their impacts, is advised. This will help women continue to weather this storm and other anticipated future shocks.
- Disruption abounds - but transformation is needed.

** COVID-19 continues to rise as this report is finalized; a second lockdown in Toronto and Peel regions takes effect.*

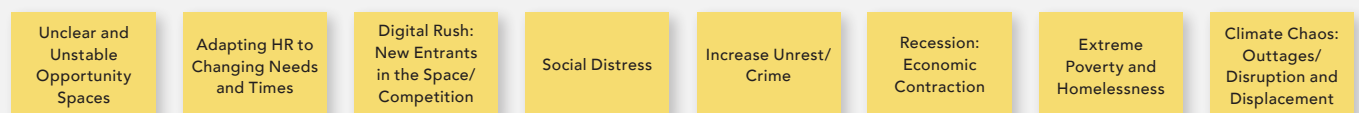
SNAPSHOT OF THE TRENDS AND DRIVERS

Below is a snapshot of the trends/drivers identified throughout the different phases of this research project. In the first section are the top 22 trends/drivers that were identified from the survey in September 2020. In the middle are the participant-identified trends from Workshop 1. At the bottom are the participant-identified trends from Workshop 2. In the November 16th snapshot it is clear that there is a general feeling of burnout and fatigue from the many sticky notes around this topic. A noticeable explosion of new issues that reveal themselves as the COVID-19 timeline wore on. Stress on mental health and wellbeing has progressed into Burnout with all of the other stressors pressuring it forward.

SEPTEMBER: Trends identified from survey results



OCTOBER 28: Additions from the workshop participants



NOVEMBER 16: Additions from the workshop participants



THEMED STRATEGIES

Participants focused on the High Impact & High Effort strategies in both Workshops.

The chart below offers businesses a thematic grouping of collaborative and partnership opportunities from only the Quadrant 2 strategies, which are **High Impact & High Effort**. These powerhouse strategies might be looked to when trying to untangle complex issues in the workplace. This data from the workshops comes from a focus group of entrepreneurs from the digital media sector in

Southern Ontario that have actively been thinking about or applying feminist values in their businesses.

These strategies could have larger impacts and implications for business beyond independently dealing with issues that have arisen in the pandemic.

Next steps are to establish supporting actions for each strategy. Another workshop could be proposed in the future for these supports and solutions.

BUSINESS MODEL & PLANNING	WORK/LIFE BALANCE
<ul style="list-style-type: none"> Understand labour market shifts with a focus on futures thinking New models for business structures and offerings Radical leadership Don't snap back to old ways when COVID is under control Valuing emotional labour as critical - not just focused on transactional 	<ul style="list-style-type: none"> People-centered economy practices Bake intrapreneurship into business practices Personal-work balance high value to mental health Keep flexibility of where and when to work Resist urgency; suppress the 'very now' and, stop 'chasing fires'
SPACES TO SUPPORT EMPLOYEES	VALUE CHAIN
<ul style="list-style-type: none"> Develop remote company cultures where teams love to work Different models of business teams and increasing flexibility New employee manuals Move away from industrial production mindset Emphasize paid holidays and breaks 	<ul style="list-style-type: none"> People benefit from local purchases Understand dependencies on and opportunities with other countries Encourage the creation of manufacturing in Canada/locally Understand fluctuating pricing Manage and pace a slow down steadily
PARTNERSHIPS	COMMUNITY & COLLABORATION
<ul style="list-style-type: none"> Evolve partnership models Partnerships and collaborations among businesses Move to a real knowledge economy 	<ul style="list-style-type: none"> Creating community Neighbours helping neighbours Think about regenerative versus high pressured transactions
MARKETING	
<ul style="list-style-type: none"> Ways to curate different experiences Digitize content and assets Use virtual reality to host live events Implement digital marketing strategies Invest in new market research 	

The full list of strategies organized by quadrants can be found in [Appendix C](#).

FINDINGS SUMMARY

We witnessed a move from considerations on internal accommodations (working from home, internet criticality, issues of policy), towards a look at the impact in a broader social context, and concerns for how operational Human Resources might or could respond. Over the course of the Study, trends and drivers shifted and evolved. By the last workshop, “burnout” was the number one problem identified by the entrepreneurs. Perhaps a culminating phenomenon, participants noted that its effects were far reaching and profoundly affecting the founders, their staff and partners.

Over the long term, we not only see the desire for business model change but also for greater collaboration across businesses and sectors to address large-scale societal problems. The ideological underpinning of extractive economies, typified by medium-size and mostly large-size businesses (who have received the bulk of government support, stimulus and bailouts) is under scrutiny by smaller sized businesses. These smaller sized businesses might validate a potential contemporary model for new, more socially and environmentally responsive models - if they can get broader institutional support in their new, more resilient manner of operating and exchanging value for and in the communities they serve. We discussed the idea that innovation that focused on ‘disruption’ was no longer appropriate - but that transformation towards new values and ecosystems was key. The pandemic has proven to be the ultimate disruption - and we are exhausted by it. Support is needed; not a push towards disruption as an ideal, as it is inherently destructive.

KEY INSIGHTS

Current, Near-term, Long-term: The progression of this Study shows a movement from immediate impact and implication thinking into the longer term. We see here an inquiring on immediate impacts of delivery and internal policy change that moves towards the contextual considerations and ideas for longer term resilience, that may require inter-organizational consideration and a rethinking of ‘value’ away from the resources extraction of employees towards more societal concerns.

Shifting Impacts and Implications: The pandemic has proved to be longer in duration than expected; many see it as a stress-test for our organizational and socio-economic foundations to begin with. Clearly, the impacts on Ontario-based women/womxn-led digital media companies have significantly changed over the short time of this study. The Pandemic Effects study charts a movement from operations towards the contextual environment, and back to the impact of mental health issues that need to be addressed by both operational and contextual issues that concern greater wellbeing and support. As discussed below, a possible positive transformation that is human-centred might evolve. Another phase in this study would benefit from consulting on and adding mechanisms to foster support and exchange amongst Digital Media women entrepreneurs.

Participants identified the utility in thinking through impacts and underlying forces, collaborating on preparedness, and fostering discussions on resiliency now. The application of this model of research and iterative workshops with focus groups should be considered for the anticipation and future-proofing of companies going forward.

CONTINUOUS SCANNING AND COLLABORATIVE RESPONSES

As noted above, there is a need for ongoing environmental scans, to take snapshots of matters of concern and introduce new discussions and sense-making tools (individual and collective) as a strategy forward. Collective sense-making in this time of shock should help to reduce the impact and foster new partners and a resilient network of entrepreneurs moving forward. The pandemic is one of many shocks that we anticipate on the horizon. Impacts and Strategies identified here may help in the preparation for future disruptions in the current context of the world.

NEW VALUES AND ECOSYSTEMS

Collective sense-making in this time of shock should help to reduce the impact and foster new partners and a resilient network of entrepreneurs.

Thank you to all of our participants

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Innovate by Day

Special thanks to our Community Supporters

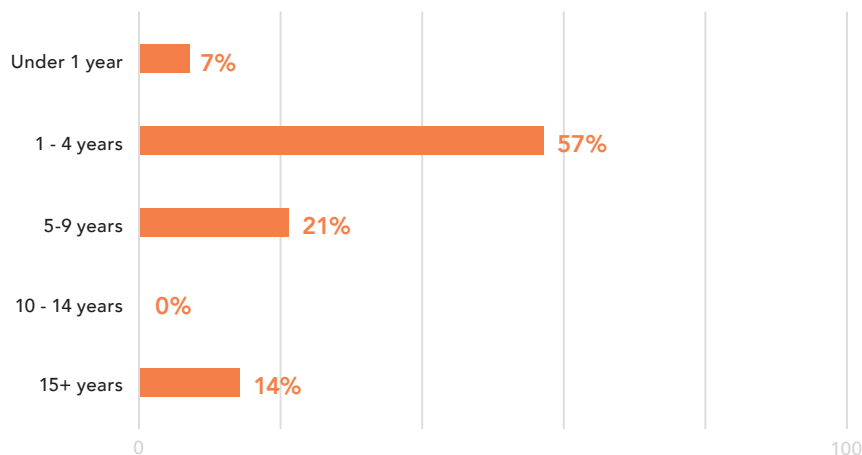


APPENDIX A

Survey Respondents' Profile

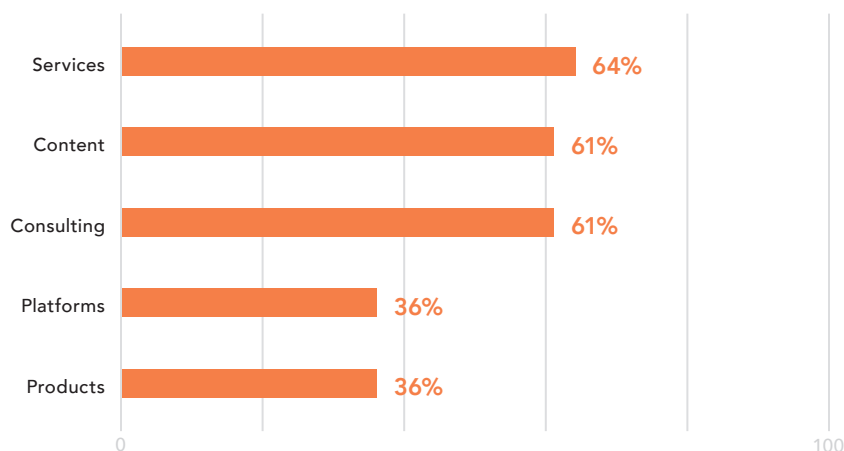
PROFILE OF RESPONDENTS

Age of Company



The sample of 28 companies includes both very young and highly experienced firms. Some 64% of respondents founded their companies after 2015, while at least four companies have been in business for more than 15 years.

Core Activities



Participating companies focus on a wide range of digital media activities. The main activities, offered by ~2/3 of respondents, include services, content development and consulting. About a third of companies have digital media platform or products.

PROFILE OF RESPONDENTS

Universe

Ontario is home to 929 Interactive Digital Media companies according to InteractiveOntario (*Measuring Success: The Impact of the Interactive Digital Media Sector in Ontario*, 2019). The same study cites that in 2015, roughly a third (27%) of Ontario’s interactive digital media workforce identified as women. Using this figure as a starting point, one could estimate that there are roughly 250 women-owned interactive digital media companies in Ontario’s digital media universe. In this scenario, our sample of 28 women-owned digital media businesses represents roughly 11% of the universe. Importantly, the findings in this report are not intended to be interpreted as statistically significant.

Employment

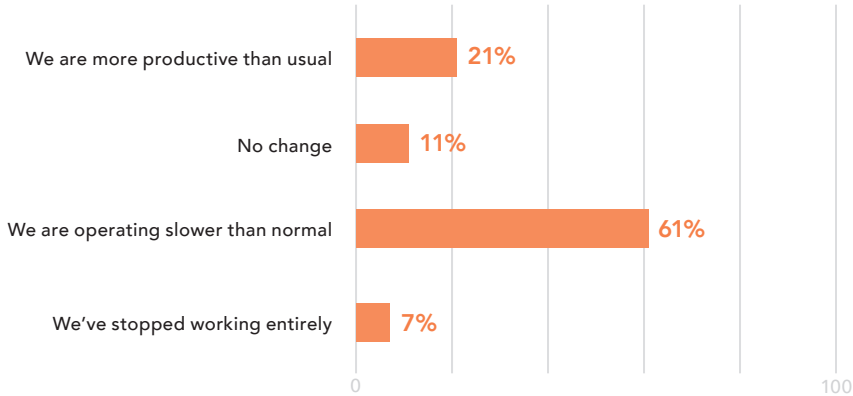
At the time the **28 respondents** completed the survey (mainly **September and October 2020**), COVID had not had a significant impact on survey participants’ workforce. The average number of full-time employees per company even grew very slightly between March 2020 and October 2020. These figures, however, may capture a turning point. By November 2020, companies that participated in the collaboration workshop reported the very real possibility of letting go of employees (or already having done so) and indicated that human resources management was a top issue or concern.

	TOTAL EMPLOYMENT		AVERAGE PER COMPANY		
	March 2020	Oct. 2020	March 2020	Oct. 2020	Change
Full Time	184	200	7.1	7.7	+ 0.6
Part-Time	29	31	1.7	1.7	+0.0
Contract/Freelancer	104	93	4.3	3.9	-0.5

IMPACT OF COVID-19 / ABILITY TO DELIVER

One assumption, leading into this engagement, was that digital media entities would be uniquely able to weather the storm of COVID as compared to other sectors. Respondents were asked, how (if at all) COVID had affected their ability to develop products and/or deliver services. About 1 in 5 respondents described their companies as “more productive than usual”, while 1 in 10 experienced no change in their ability to develop and deliver. The majority, however, (68% of respondents) indicated that COVID-19 had slowed or halted their ability to develop products/deliver their services.

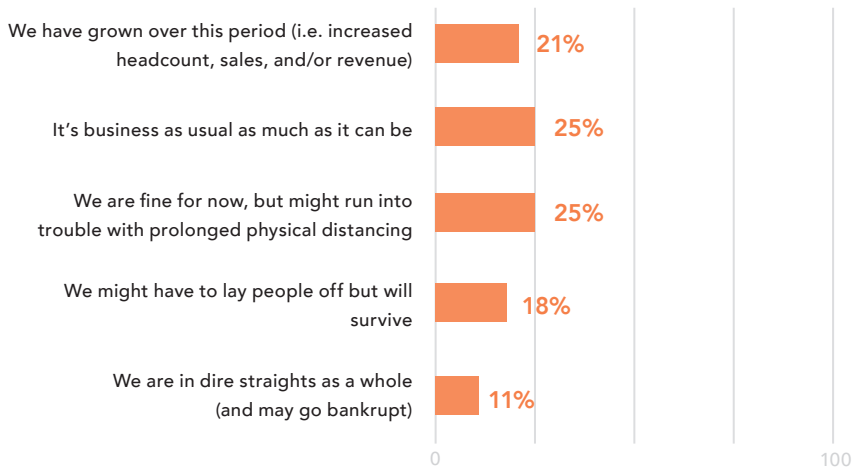
For those firms experiencing delays in getting products or services to market, the time lag was significant. On average, respondents estimated COVID had created up to a 20-month delay in development and delivery of products and services.



IMPACT OF COVID-19 / FISCAL HEALTH

When asked to characterize the impact of COVID on their overall fiscal health, responses were split fairly evenly across the spectrum. Some 11% of companies described themselves as in “dire straits.” One in five, however, indicated that they had “grown over this period” (21%).

For 50% of respondents, their fiscal situation has either not changed, i.e., “business as usual” or they feel “fine for now” amid COVID. Again - these responses largely reflect perspectives from September and October. Should current circumstances continue, respondents estimated that their company could keep covering expenses for an average of 6.4 months.



IMPACT OF COVID-19 / TOP ISSUES

Survey respondents were presented with a range of issues or impacts as a result of COVID and asked to rank those with the greatest anticipated impact on their company.

The top concerns related to loss of future business opportunities (57%) and the cancellation of current contracts (50%).

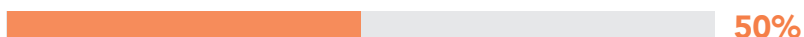
The next tier of concerns relate again to work loss and loss of productivity.

One third of firms are concerned about how to properly support employees amid COVID.

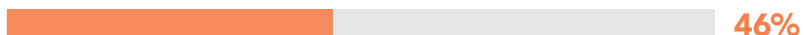
Loss of business development opportunities directly related to COVID-19 impacts and cancellations



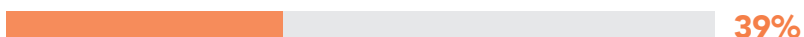
Contract cancellations, disruptions and/or delays



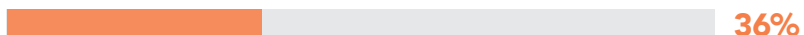
Inability to perform work requiring physical/in-person meetings (i.e. performance capture)



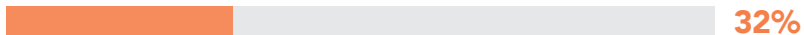
Loss of productivity due to teams working from home



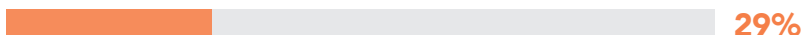
Properly supporting employees concerned about their livelihood and the health of their family



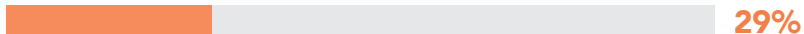
Decrease in sales due to reduced purchasing power of customers and/or ad budgets



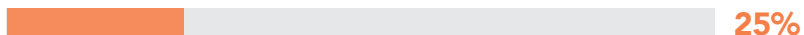
Cash flow issues



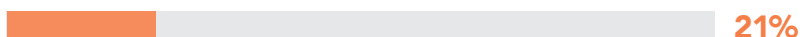
Not being able to maintain work/productivity if employees have COVID-19 related issues



Delays or cancellation of hiring new employees



Difficulty maintaining company culture



APPENDIX B

Trends and Drivers: Definition

DRIVERS

Drivers or drivers of change, are larger forces that have deep and disruptive impacts across several trend categories, which are patterns of change that are brought into being as a result of the Driver's force; they may affect one or a small few more of the dimensions of our contextual landscape. And although not totalizing in their impact, trends may become drivers themselves overtime. Together, with the Fifth Wave Initiative cohort, we began to work through the prominent Drivers and Trends - a refined set of 'Pandemic Effects'.

TRENDS

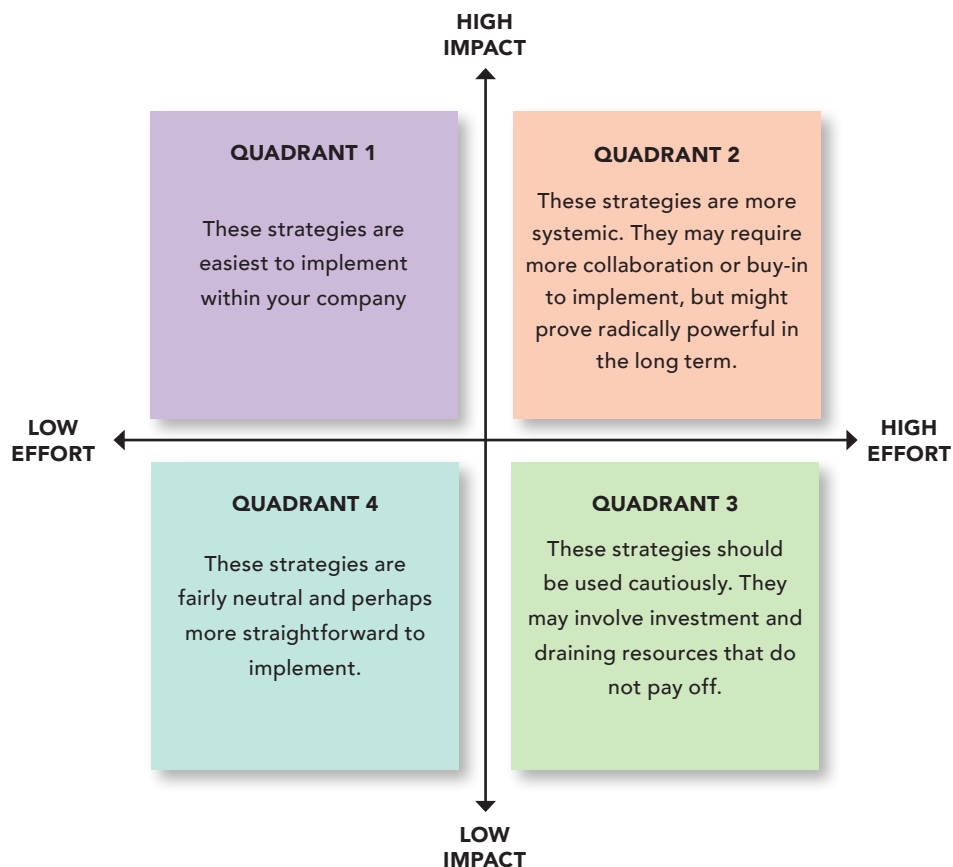
Trends are patterns of change that are happening now and need addressing. They are sorted into Social, Technological, Economic, Environmental, Political, and Values (STEEP+V). This is a standard framework used in Strategic Foresight practices to ensure that we are thinking thoroughly about potential changes and is meant to help comprehensively delineate aspects of the contextual landscape in which we operate. The framework is considered imperfect, hence the usage of the "+" in the framework acronym - "values" is sometimes omitted, or other categories (such as legal) may be used. However, we used "values" as the tension between social (institutional) and values changes are illuminating - and may be a signal to future shifts in the contradictions and complexities of their natures.

APPENDIX C

Pandemic Effect Worksheets

AREAS OF OPPORTUNITY: BY QUADRANT

The following pages amalgamate the strategies discussed across these four deep dives by quadrant and thematic cluster. Note that Quadrant Two is the area of high effort and high impact, and was centred in our discussions as a working group in the session.



Community & Collaboration

QUADRANT 2: High Impact & High Effort	<ul style="list-style-type: none">• Creating community• Neighbours helping neighbours
QUADRANT 1: High Impact & Low Effort	<ul style="list-style-type: none">• Collaboration and change contribute to society• Creating community around the neighbourhood• Starting to buy local• Partnering locally to combine resources and asks• Access bases pricing or social justice-based pricing
QUADRANT 4: Low Impact & Low Effort	<ul style="list-style-type: none">• Businesses find resources in their own neighborhoods• Collaborative research for businesses to draw from
QUADRANT 3: High Effort & Low Impact	<ul style="list-style-type: none">• Barnraising to help each other• Expand geographic market given digital access and connectivity

Work/Life Balance

QUADRANT 2: High Impact & High Effort	<ul style="list-style-type: none">• People-centered economy practices, baking intrapreneurship into how people work• Personal-work balance high value to mental health
QUADRANT 1: High Impact & Low Effort	<ul style="list-style-type: none">• Talking to your employees about how they want to work• Check ins and personal conversation time• It's ok to take a break

Creating New Spaces to Support Employees

QUADRANT 2: High Impact & High Effort	<ul style="list-style-type: none">• Developing remote company cultures where teams love to work• Different models of business teams and increasing flexibility• New employee manuals
QUADRANT 1: High Impact & Low Effort	<ul style="list-style-type: none">• Creating space to work or play• Creating informal spaces to cross-collaborate and gain a rapport• Listing company values and making them clear to the team
QUADRANT 4: Low Impact & Low Effort	<ul style="list-style-type: none">• Create learning opportunities and conversations

Business Model & Planning

QUADRANT 2: High Impact & High Effort	<ul style="list-style-type: none">• Understanding labour market shifts and doing labour market shifts futures thinking• New models for business structures and offerings• Radical leadership
QUADRANT 1: High Impact & Low Effort	<ul style="list-style-type: none">• Utilizing professionals in the space of planning and strategies• Trimming the tree• Schedule thinking and processing time• Compensation for thinking - to be accepted as a business practice• Valuing feminist business practices
QUADRANT 4: Low Impact & Low Effort	<ul style="list-style-type: none">• Identify businesses impacted the most by the pandemic• Bartering as part of your business model
QUADRANT 3: High Effort & Low Impact	<ul style="list-style-type: none">• Organizational change that becomes more cooperative• Educate and train to do more things locally

Partnerships

QUADRANT 2: High Impact & High Effort	<ul style="list-style-type: none">• Ethics = changing partnership models• Polyamorous partnerships• Partnerships and collaborations among businesses
QUADRANT 1: High Impact & Low Effort	<ul style="list-style-type: none">• New partnership strategies
QUADRANT 4: Low Impact & Low Effort	<ul style="list-style-type: none">• Expand geographic market given digital access and connectivity

Value Chain

QUADRANT 2: High Impact & High Effort	<ul style="list-style-type: none">• Identify 'civilized' people, benefit of local purchases• Understand dependencies on other countries• Encourage manufacturing in Canada• Understanding fluctuating pricing
--	--

Marketing

QUADRANT 2: High Impact & High Effort	<ul style="list-style-type: none">• Ways to curate different experiences• Digitize content & assets• Use Virtual Reality to host live events• Digital marketing strategies• Investing in new market research
QUADRANT 1: High Impact & Low Effort	<ul style="list-style-type: none">• Develop e-commerce capabilities• Create digital space for business to augment your bricks and mortar location• Blended and hybrid XD/LX and storytelling• Notice and reach out to others• Contact local media/newspapers• Community Facebook page

TREND RESULTS IN SURVEY: CURRENT & NEAR FUTURE

Respondents were asked to rank a series of issues/COVID-19 Trends and Drivers according to the degree to which that issue was having an impact on their ability to run their business amid COVID-19 both now, and if that issue were to persist. The ranking scale ranged from:

- Not applicable: 0 pt per answer
- No impact: 1 pt
- Some impact: 2 pts
- Large impact: 3 pts
- Mean: Total points / Total number of responses (28)

The closer the mean of a factor gets to 3, the higher impact it has had/will have on women entrepreneurs.

Importantly, as we shift from a current and future perspective, the mean score itself may remain unchanged but the overall ranking of that particular issue (within the full set) may have risen or declined in relation to the overall set. Note that while anti-racism did not hit the top 22 in the first round, anti-racism awareness did - as this would be a direct concern for integration in business practices and policies.

SURVEY RESULTS: DRIVERS

STEEP+V:

Social

Technological

Economic

Environmental

Political

Values

TREND DESCRIPTION	CURRENT RANK (2020)	RANK IN 3 YEARS (2023)
Increased Stress and Mental Health	1	1
Physical Distancing	2	7
Work/Life Boundaries	3	3
Unstable Cash Flow	4	4
Social Inequity	5	9
Work Platform Proliferations	6	11
Anti-racism Awareness	7	2
Data Transfer Needs	8	19
Internet Criticality	9	12
Rapidly Changing Government Policies	10	6
Increased Focus on Local Community	11	5
Precarious Work	12	15
Funding Uncertainties	13	8
Reconciliation/Decolonization	14	14
Business Model Adjustments	15	21
Digital Carbon Footprint	16	17
Caregiving Dependents	17	16
Rising Racism	18	18
Surging Unemployment	19	13
Misinformation	20	20
Anti-feminist Backlash	21	10
Remote Work	22	22
Political Extremism	23	23
Stimulus Spending	24	24
Supply Chain Disruptions	25	25
COVID Contact at Work	26	26
Access to PPE	27	27
Food Insecurity	28	28
Justice System Backlog	29	29

SURVEY RESULTS: DRIVERS

Impact Rating	Impact Score
Not Applicable	0
No Impact	1
Some Impact	2
Large Impact	3

STEEP+V:

Social

Technological

Economic

Environmental

Political

Values

INCREASED STRESS AND MENTAL HEALTH CONCERNS

To what degree has this large-scale driver impacted your business right now?

Not applicable	No Impact	Some Impact	Large Impact	Mean
0	0	8	19	2.70

If this persists over 3 years, will this have:

Not applicable	No Impact	Some Impact	Large Impact	Mean
0	1	4	22	2.78

PHYSICAL DISTANCING

To what degree has this large-scale driver impacted your business right now?

Not applicable	No Impact	Some Impact	Large Impact	Mean
2	1	10	14	2.33

If this persists over 3 years, will this have:

Not applicable	No Impact	Some Impact	Large Impact	Mean
2	2	9	14	2.30

WORK/LIFE BOUNDARIES

To what degree has this large-scale driver impacted your business right now?

Not applicable	No Impact	Some Impact	Large Impact	Mean
1	3	9	14	2.33

If this persists over 3 years, will this have:

Not applicable	No Impact	Some Impact	Large Impact	Mean
1	3	4	19	2.52

INCREASED FOCUS ON LOCAL COMMUNITY

To what degree has this large-scale driver impacted your business right now?

Not applicable	No Impact	Some Impact	Large Impact	Mean
2	4	12	9	2.04

If this persists over 3 years, will this have:

Not applicable	No Impact	Some Impact	Large Impact	Mean
2	1	9	15	2.37

SURVEY RESULTS: DRIVERS

Impact Rating	Impact Score
Not Applicable	0
No Impact	1
Some Impact	2
Large Impact	3

STEEP+V:

Social

Technological

Economic

Environmental

Political

Values

BUSINESS MODEL ADJUSTMENTS

To what degree has this large-scale driver impacted your business right now?

Not applicable	No Impact	Some Impact	Large Impact	Mean
3	6	9	9	1.89

If this persists over 3 years, will this have:

Not applicable	No Impact	Some Impact	Large Impact	Mean
3	5	9	10	1.96

CAREGIVING DEPENDENTS

To what degree has this large-scale driver impacted your business right now?

Not applicable	No Impact	Some Impact	Large Impact	Mean
5	5	11	6	1.65

If this persists over 3 years, will this have:

Not applicable	No Impact	Some Impact	Large Impact	Mean
5	3	6	13	2.00

SURVEY RESULTS: DRIVERS

Impact Rating	Impact Score
Not Applicable	0
No Impact	1
Some Impact	2
Large Impact	3

STEEP+V:

Social

Technological

Economic

Environmental

Political

Values

RAPIDLY CHANGING GOVERNMENT POLICIES

To what degree has this large-scale driver impacted your business right now?

Not applicable	No Impact	Some Impact	Large Impact	Mean
3	1	15	8	2.04

If this persists over 3 years, will this have:

Not applicable	No Impact	Some Impact	Large Impact	Mean
3	0	10	14	2.30

RECONCILIATION/DECOLONIZATION

To what degree has this large-scale driver impacted your business right now?

Not applicable	No Impact	Some Impact	Large Impact	Mean
2	5	13	7	1.93

If this persists over 3 years, will this have:

Not applicable	No Impact	Some Impact	Large Impact	Mean
2	3	11	11	2.15

RISING RACISM

To what degree has this large-scale driver impacted your business right now?

Not applicable	No Impact	Some Impact	Large Impact	Mean
0	12	12	3	1.67

If this persists over 3 years, will this have:

Not applicable	No Impact	Some Impact	Large Impact	Mean
0	8	9	10	2.07

MISINFORMATION

To what degree has this large-scale driver impacted your business right now?

Not applicable	No Impact	Some Impact	Large Impact	Mean
4	9	7	7	1.63

If this persists over 3 years, will this have:

Not applicable	No Impact	Some Impact	Large Impact	Mean
4	3	10	10	1.96

SURVEY RESULTS: DRIVERS

Impact Rating	Impact Score
Not Applicable	0
No Impact	1
Some Impact	2
Large Impact	3

STEEP+V:

Social

Technological

Economic

Environmental

Political

Values

ANTI-FEMINIST BACKLASH

To what degree has this large-scale driver impacted your business right now?

Not applicable	No Impact	Some Impact	Large Impact	Mean
1	10	15	1	1.59

If this persists over 3 years, will this have:

Not applicable	No Impact	Some Impact	Large Impact	Mean
1	1	15	10	2.26

POLITICAL EXTREMISM

To what degree has this large-scale driver impacted your business right now?

Not applicable	No Impact	Some Impact	Large Impact	Mean
7	2	14	4	1.56

If this persists over 3 years, will this have:

Not applicable	No Impact	Some Impact	Large Impact	Mean
7	2	8	10	1.78

STIMULUS SPENDING

To what degree has this large-scale driver impacted your business right now?

Not applicable	No Impact	Some Impact	Large Impact	Mean
8	4	9	6	1.48

If this persists over 3 years, will this have:

Not applicable	No Impact	Some Impact	Large Impact	Mean
8	1	8	10	1.74

SURVEY RESULTS: DRIVERS

Impact Rating	Impact Score
Not Applicable	0
No Impact	1
Some Impact	2
Large Impact	3

STEEP+V:

Social

Technological

Economic

Environmental

Political

Values

WORK PLATFORM PROLIFERATIONS

To what degree has this large-scale driver impacted your business right now?

Not applicable	No Impact	Some Impact	Large Impact	Mean
1	2	14	10	2.22

If this persists over 3 years, will this have:

Not applicable	No Impact	Some Impact	Large Impact	Mean
1	5	8	13	2.22

DATA TRANSFER NEEDS

To what degree has this large-scale driver impacted your business right now?

Not applicable	No Impact	Some Impact	Large Impact	Mean
1	5	12	9	2.07

If this persists over 3 years, will this have:

Not applicable	No Impact	Some Impact	Large Impact	Mean
1	6	12	8	2.00

INTERNET CRITICALITY

To what degree has this large-scale driver impacted your business right now?

Not applicable	No Impact	Some Impact	Large Impact	Mean
1	7	8	11	2.07

If this persists over 3 years, will this have:

Not applicable	No Impact	Some Impact	Large Impact	Mean
1	6	6	14	2.22

REMOTE WORK

To what degree has this large-scale driver impacted your business right now?

Not applicable	No Impact	Some Impact	Large Impact	Mean
3	9	11	4	1.59

If this persists over 3 years, will this have:

Not applicable	No Impact	Some Impact	Large Impact	Mean
3	5	13	6	1.81

SURVEY RESULTS: DRIVERS

Impact Rating	Impact Score
Not Applicable	0
No Impact	1
Some Impact	2
Large Impact	3

STEEP+V:

Social

Technological

Economic

Environmental

Political

Values

UNSTABLE CASH FLOW

To what degree has this large-scale driver impacted your business right now?

Not applicable	No Impact	Some Impact	Large Impact	Mean
1	2	13	11	2.26

If this persists over 3 years, will this have:

Not applicable	No Impact	Some Impact	Large Impact	Mean
1	2	6	18	2.52

PRECARIOUS WORK

To what degree has this large-scale driver impacted your business right now?

Not applicable	No Impact	Some Impact	Large Impact	Mean
3	6	6	12	2.00

If this persists over 3 years, will this have:

Not applicable	No Impact	Some Impact	Large Impact	Mean
3	6	2	16	2.15

FUNDING UNCERTAINTIES

To what degree has this large-scale driver impacted your business right now?

Not applicable	No Impact	Some Impact	Large Impact	Mean
4	1	14	8	1.96

If this persists over 3 years, will this have:

Not applicable	No Impact	Some Impact	Large Impact	Mean
1	3	9	14	2.26

SURGING UNEMPLOYMENT

To what degree has this large-scale driver impacted your business right now?

Not applicable	No Impact	Some Impact	Large Impact	Mean
3	7	13	4	1.67

If this persists over 3 years, will this have:

Not applicable	No Impact	Some Impact	Large Impact	Mean
2	3	10	12	2.19

SURVEY RESULTS: DRIVERS

Impact Rating	Impact Score
Not Applicable	0
No Impact	1
Some Impact	2
Large Impact	3

STEEP+V:

Social

Technological

Economic

Environmental

Political

Values

SUPPLY CHAIN DISRUPTIONS

To what degree has this large-scale driver impacted your business right now?

Not applicable	No Impact	Some Impact	Large Impact	Mean
5	7	13	2	1.44

If this persists over 3 years, will this have:

Not applicable	No Impact	Some Impact	Large Impact	Mean
6	4	10	7	1.67

COVID CONTACT AT WORK

To what degree has this large-scale driver impacted your business right now?

Not applicable	No Impact	Some Impact	Large Impact	Mean
7	7	10	3	1.33

If this persists over 3 years, will this have:

Not applicable	No Impact	Some Impact	Large Impact	Mean
6	2	16	3	1.59

ACCESS TO PPE

To what degree has this large-scale driver impacted your business right now?

Not applicable	No Impact	Some Impact	Large Impact	Mean
7	10	8	2	1.19

If this persists over 3 years, will this have:

Not applicable	No Impact	Some Impact	Large Impact	Mean
6	8	9	84	1.41

FOOD INSECURITY

To what degree has this large-scale driver impacted your business right now?

Not applicable	No Impact	Some Impact	Large Impact	Mean
9	12	5	1	0.93

If this persists over 3 years, will this have:

Not applicable	No Impact	Some Impact	Large Impact	Mean
9	7	8	3	1.19

SURVEY RESULTS: DRIVERS

Impact Rating	Impact Score
Not Applicable	0
No Impact	1
Some Impact	2
Large Impact	3

STEEP+V:

Social

Technological

Economic

Environmental

Political

Values

JUSTICE SYSTEM BACKLOG

To what degree has this large-scale driver impacted your business right now?

Not applicable	No Impact	Some Impact	Large Impact	Mean
11	9	5	1	0.85

If this persists over 3 years, will this have:

Not applicable	No Impact	Some Impact	Large Impact	Mean
11	8	5	3	1.00

SOCIAL INEQUITY

To what degree has this large-scale driver impacted your business right now?

Not applicable	No Impact	Some Impact	Large Impact	Mean
1	4	10	12	2.22

If this persists over 3 years, will this have:

Not applicable	No Impact	Some Impact	Large Impact	Mean
1	2	13	11	2.26

ANTI-RACISM AWARENESS

To what degree has this large-scale driver impacted your business right now?

Not applicable	No Impact	Some Impact	Large Impact	Mean
0	5	12	10	2.19

If this persists over 3 years, will this have:

Not applicable	No Impact	Some Impact	Large Impact	Mean
0	1	8	18	2.63

DIGITAL CARBON FOOTPRINT

To what degree has this large-scale driver impacted your business right now?

Not applicable	No Impact	Some Impact	Large Impact	Mean
1	10	9	7	1.81

If this persists over 3 years, will this have:

Not applicable	No Impact	Some Impact	Large Impact	Mean
1	7	8	11	2.07