

Initial Highlights | April 2020

Week 3: Tracking the Impact of COVID-19

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COVID-19 Survey Summary – April 3rd, 2020

Today, INNOVATIVE is releasing the third survey in our ongoing project to understand public opinion as the COVID-19 situation evolves in Canada.

The national survey conducted between March 31 and April 2, 2020 in both English and French has a weighted sample size of 1,500 respondents across Canada. A full methodology is available in the appendix.

Today's release focuses on 3 key questions:

1. Are Canadians changing their perceptions of and engagement with this disease?
2. Are Canadians changing their behaviour and, if so, how are they doing so?
3. How is approval of the government's response changing over time?

Note: Results are drawn from a larger omnibus survey containing multiple topics. This release focuses on the COVID-19 pandemic and the relevant section of the questionnaire is provided as an appendix.

Issue Agenda:

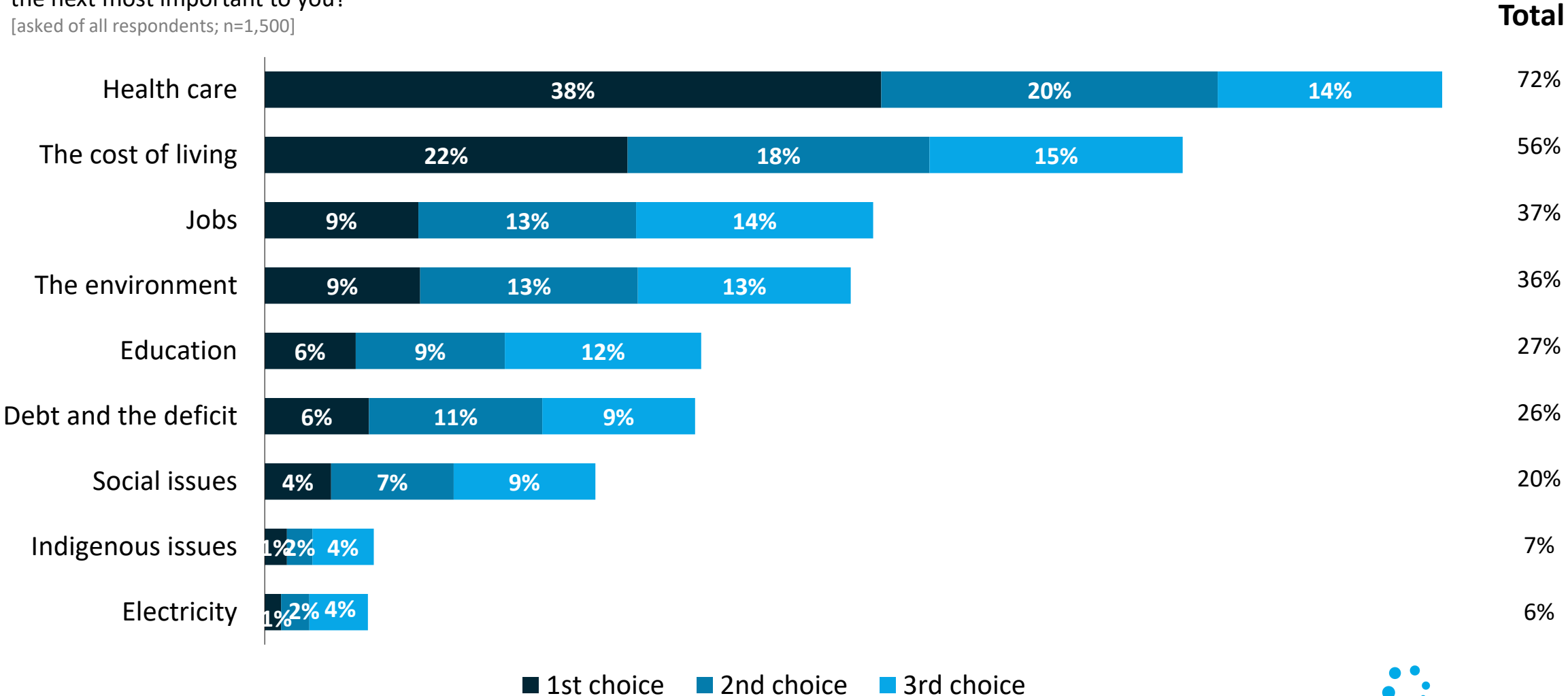
Health continues to dominate. Job concerns grow and affordability and environment ebb.

Issue Importance: More than 7-in-10 respondents (72%) say health care⁵ is one of the most important issues to them



Which of the following issues is the most important issue to you? And which of these issues is the next most important to you? And which of these issues is the next most important to you?

[asked of all respondents; n=1,500]



■ 1st choice ■ 2nd choice ■ 3rd choice



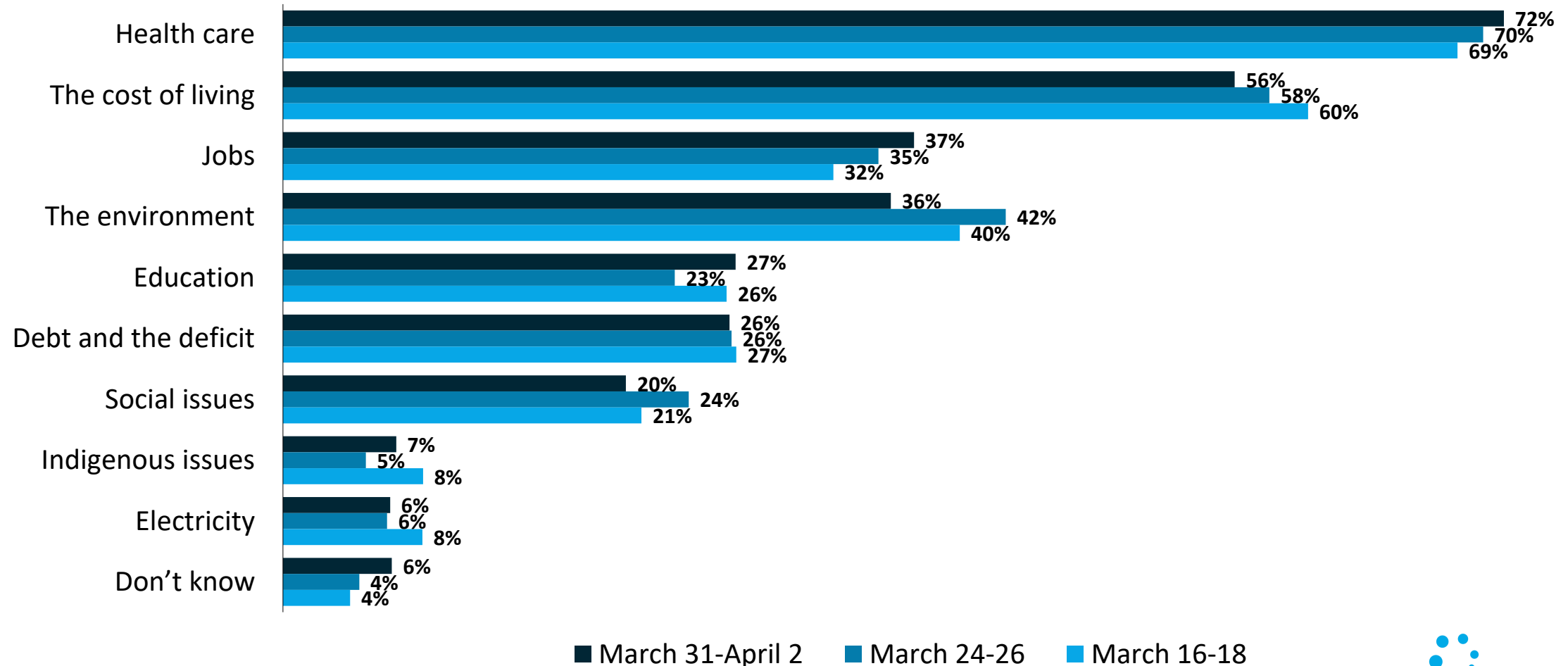
Note: "Don't know" not shown, respondents who say 'don't know' do not get asked for further priorities.

Issue Importance: Health care remains top important issue, while Jobs continues to rise; cost of living and environment decrease in importance



Which of the following issues is the most important issue to you? And which of these issues is the next most important to you? And which of these issues is the next most important to you? **Showing total.**

[asked of all respondents; n=1,500]



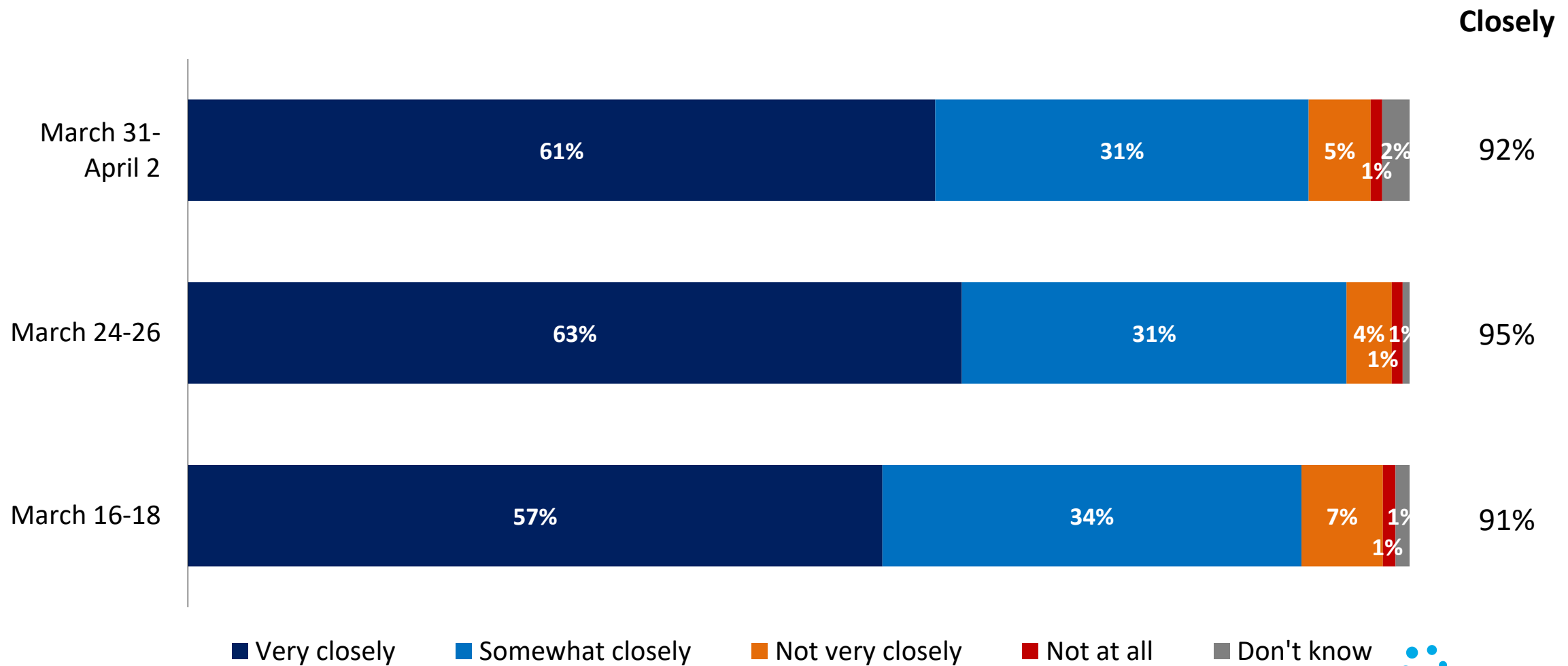
COVID 19 Engagement and Key Attitudes:

Engagement and most attitudes have plateaued.

Attention to COVID-19 News: Attention to COVID-19 is down directionally, but remains high overall



How closely have you been following news about COVID-19 which is also known as the novel coronavirus?
[asked of all respondents; n=1,500]



Very closely Somewhat closely Not very closely Not at all Don't know

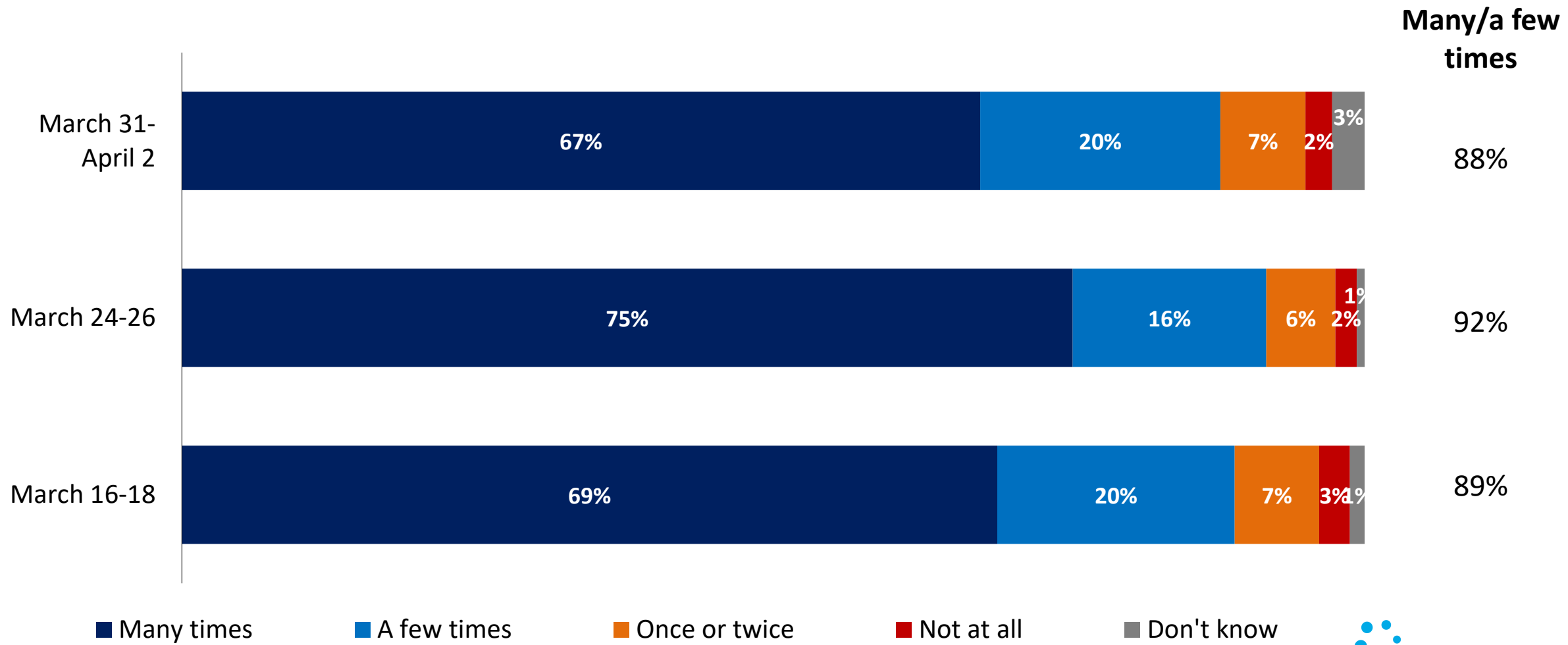


Discussion of COVID-19: Frequent discussion of COVID-19 down 8 points but 67% still say they discussed it many times this week



In the past few weeks, how often have you discussed COVID-19 with your family or friends?

[asked of all respondents; n=1,500]

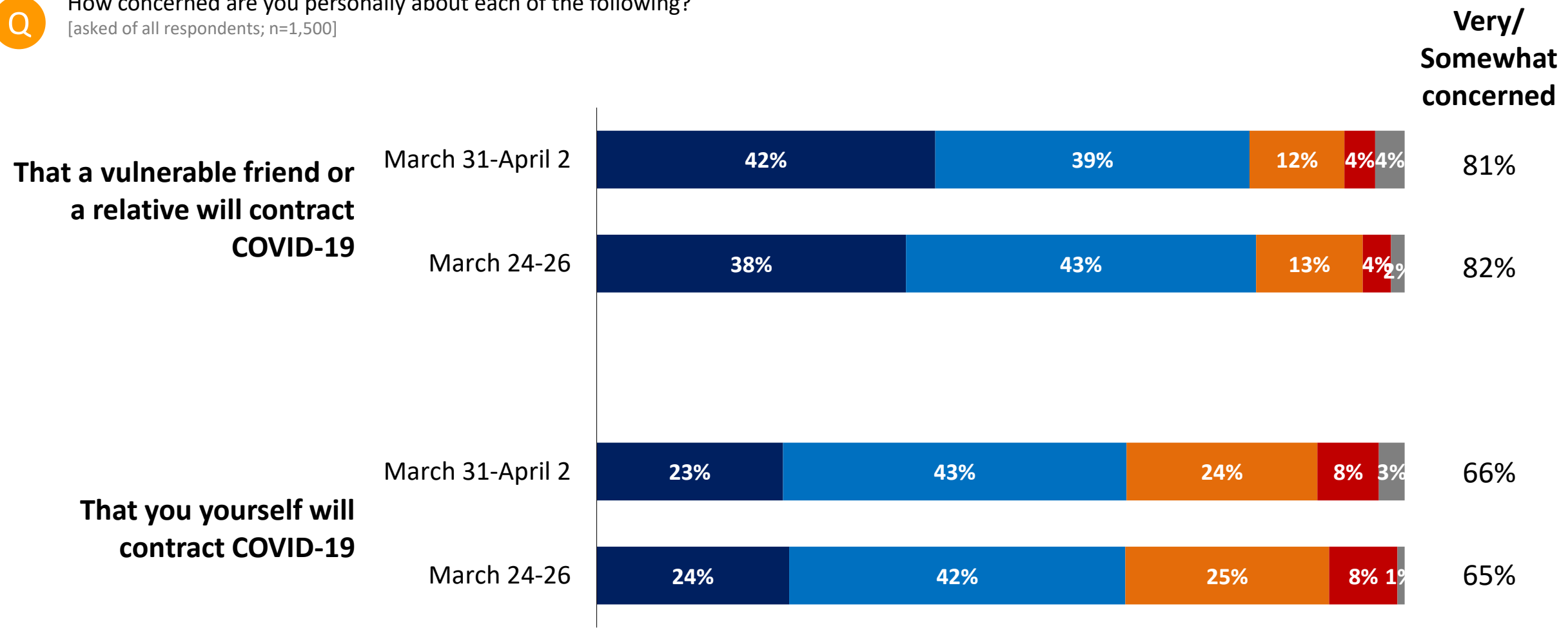


■ Many times ■ A few times ■ Once or twice ■ Not at all ■ Don't know



Concern: Moderate levels of concern that respondents themselves or a vulnerable relative or friend will contract the virus ¹⁰

Q How concerned are you personally about each of the following?
 [asked of all respondents; n=1,500]



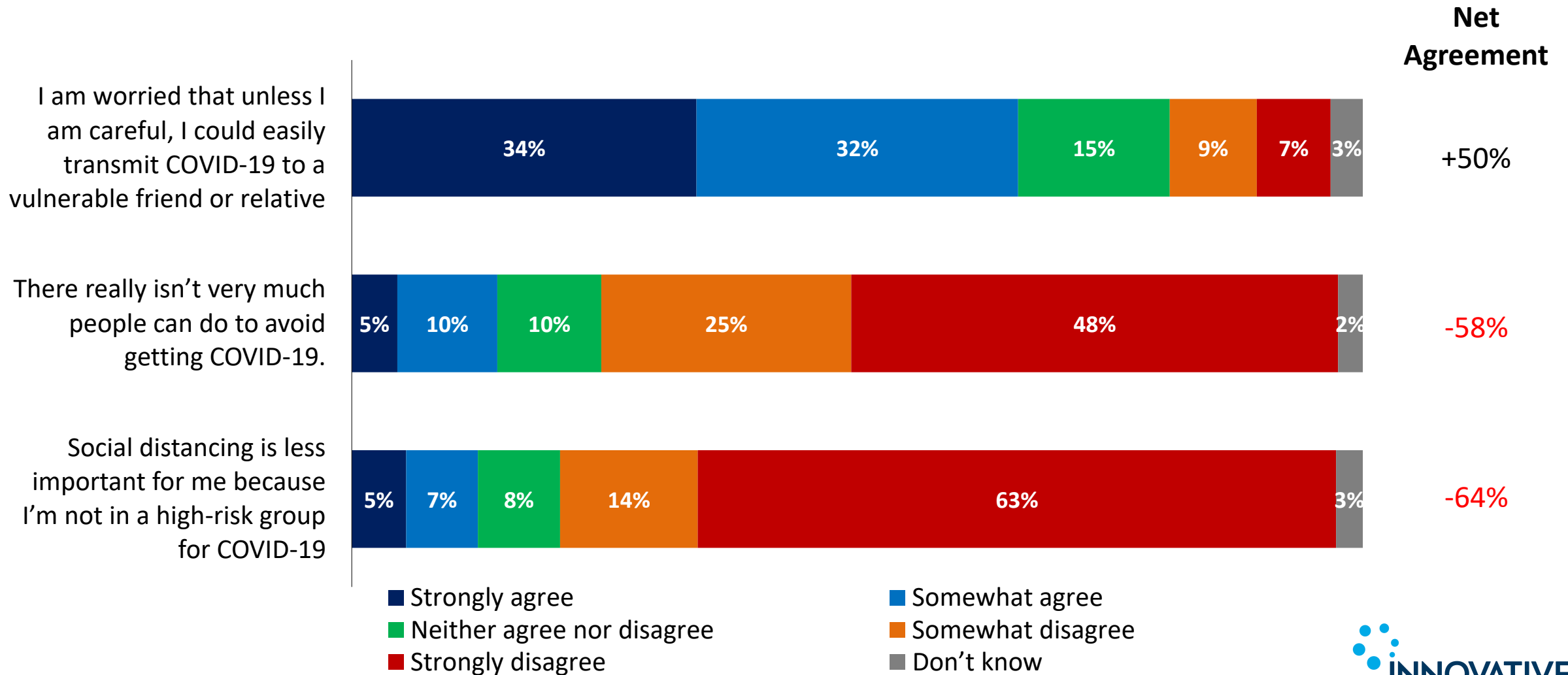
■ Very concerned
 ■ Somewhat concerned
 ■ Not very concerned
 ■ Not at all concerned
 ■ Don't know

Attitudes: 15% of respondents agree that there isn't much people can do to avoid getting COVID-19



Do you agree or disagree with the following statements?

[asked of all respondents; n=1,500]

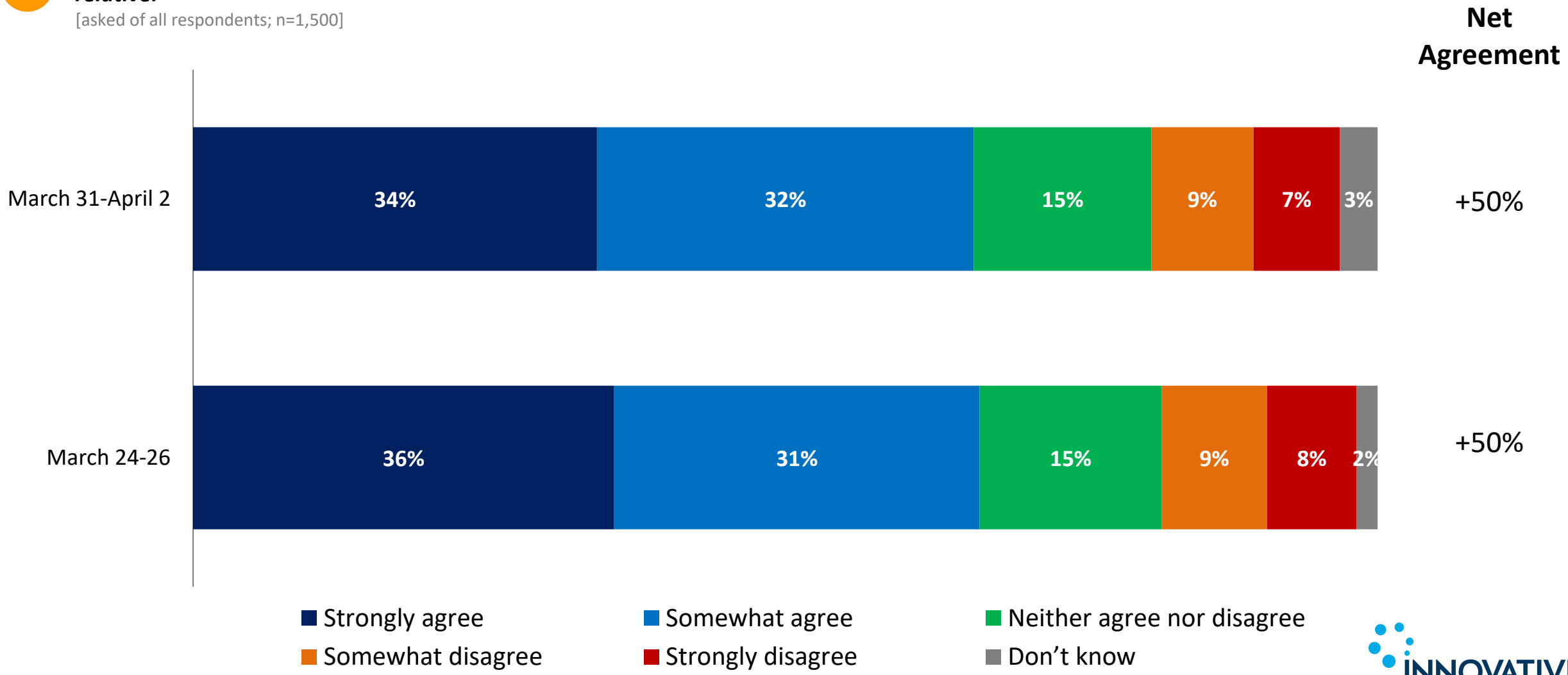


Transmission: Concern for vulnerable people stable; 2-in-3 worry that they could transmit COVID-19 to a vulnerable person



Do you agree or disagree with the following statements? *I am worried that unless I am careful, I could easily transmit COVID-19 to a vulnerable friend or relative.*

[asked of all respondents; n=1,500]



- Strongly agree
- Somewhat agree
- Neither agree nor disagree
- Somewhat disagree
- Strongly disagree
- Don't know

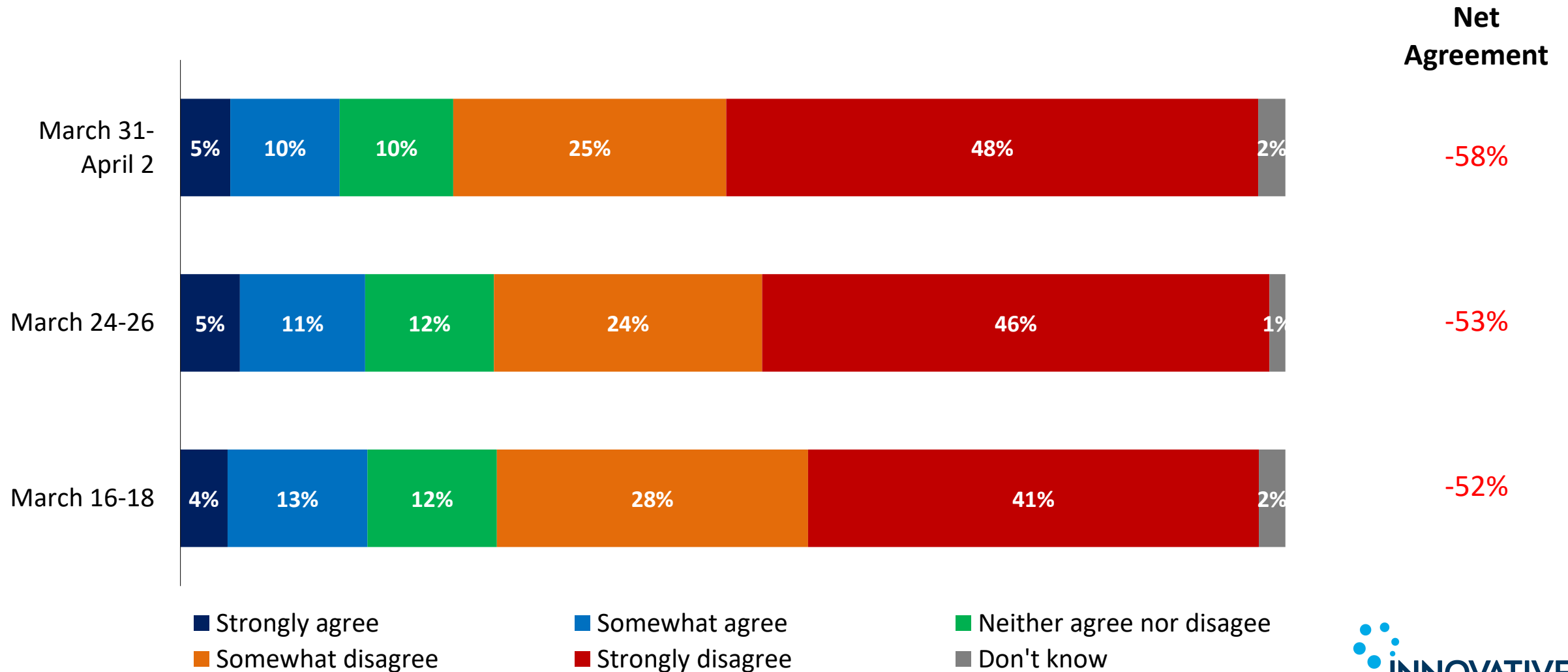


Avoidance: There has been a 5 point improvement in net agreement since the last wave, more believe they can make a difference.



Do you agree or disagree with the following statements? *There really isn't very much people can do to avoid getting COVID-19.*

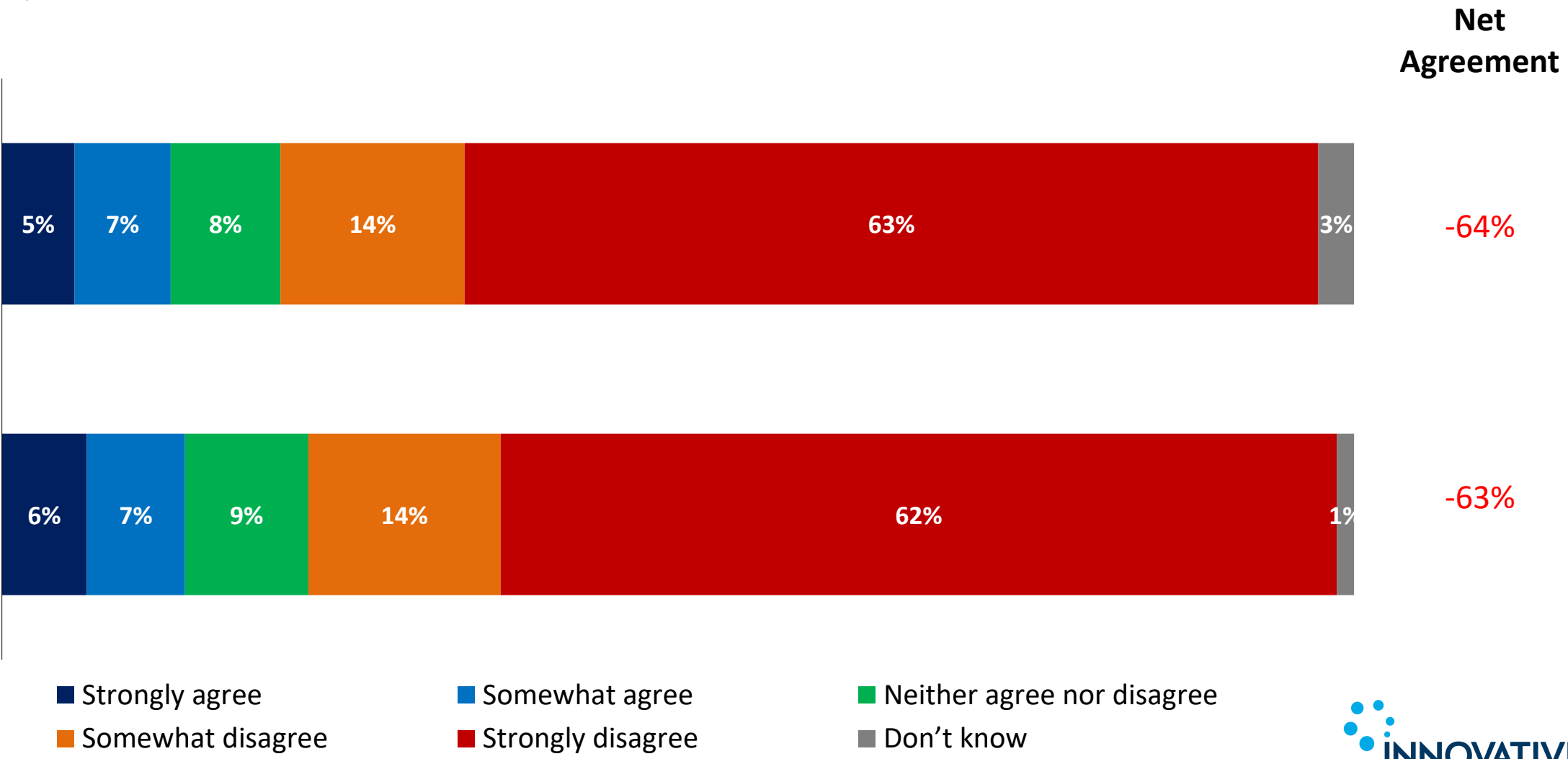
[asked of all respondents; n=1,500]



Social Distancing: 12% still agree that social distancing is less important¹⁴ because they are not in a high risk group



Do you agree or disagree with the following statements? *Social distancing is less important for me because I'm not in a high-risk group for COVID-19*
[asked of all respondents; n=1,500]



■ Strongly agree ■ Somewhat agree ■ Neither agree nor disagree
■ Somewhat disagree ■ Strongly disagree ■ Don't know



Behaviour Change:

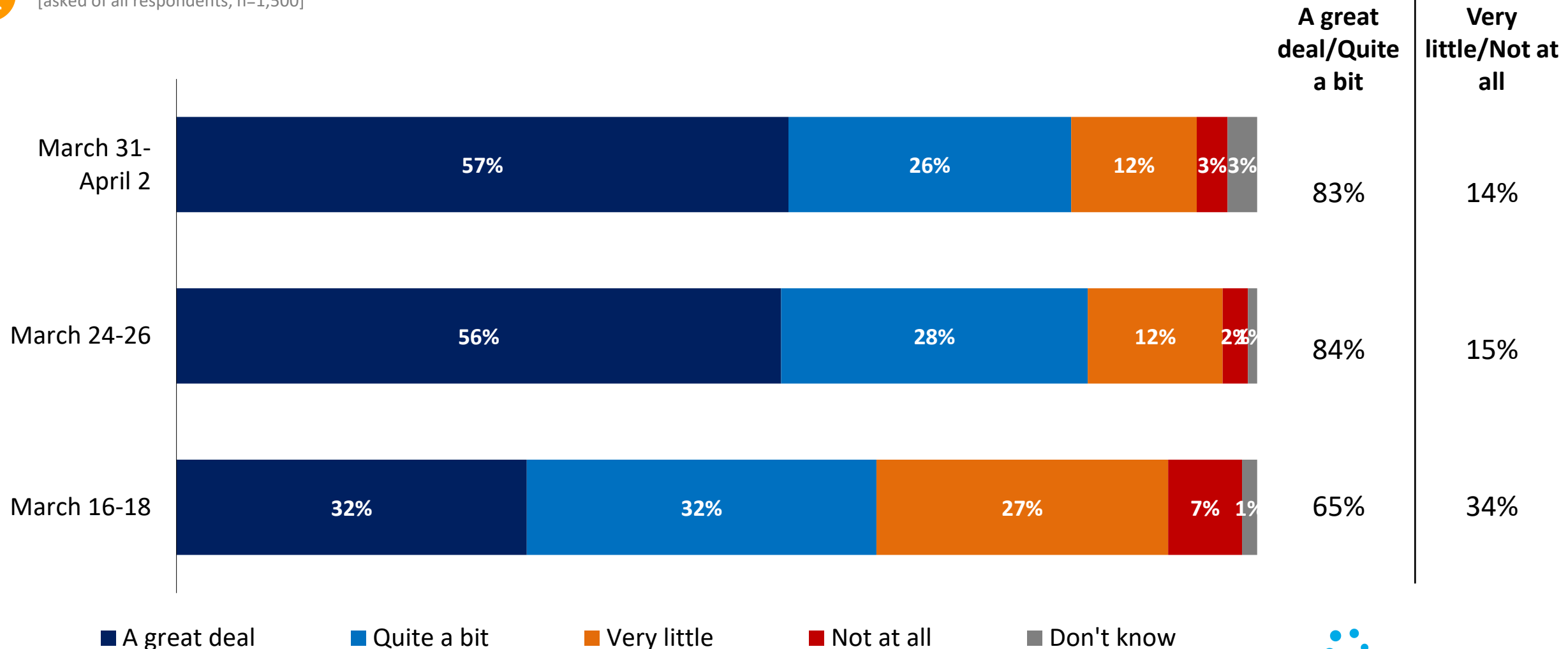
Behaviours show limited improvement. Self-reported change is flat with 57% reporting major change. There is some reduction in shopping and visiting homes. But social connections outside remain stable. People who claim to be self-isolating are almost as active as others. More conviction is needed.

Behavioural Changes: Over 8-in-10 continue to report changing behaviour at least quite a bit – steady from last week



How much have you changed your day-to-day behaviour in order to reduce the chance you will get COVID-19 or pass it on to others?

[asked of all respondents; n=1,500]



■ A great deal

■ Quite a bit

■ Very little

■ Not at all

■ Don't know

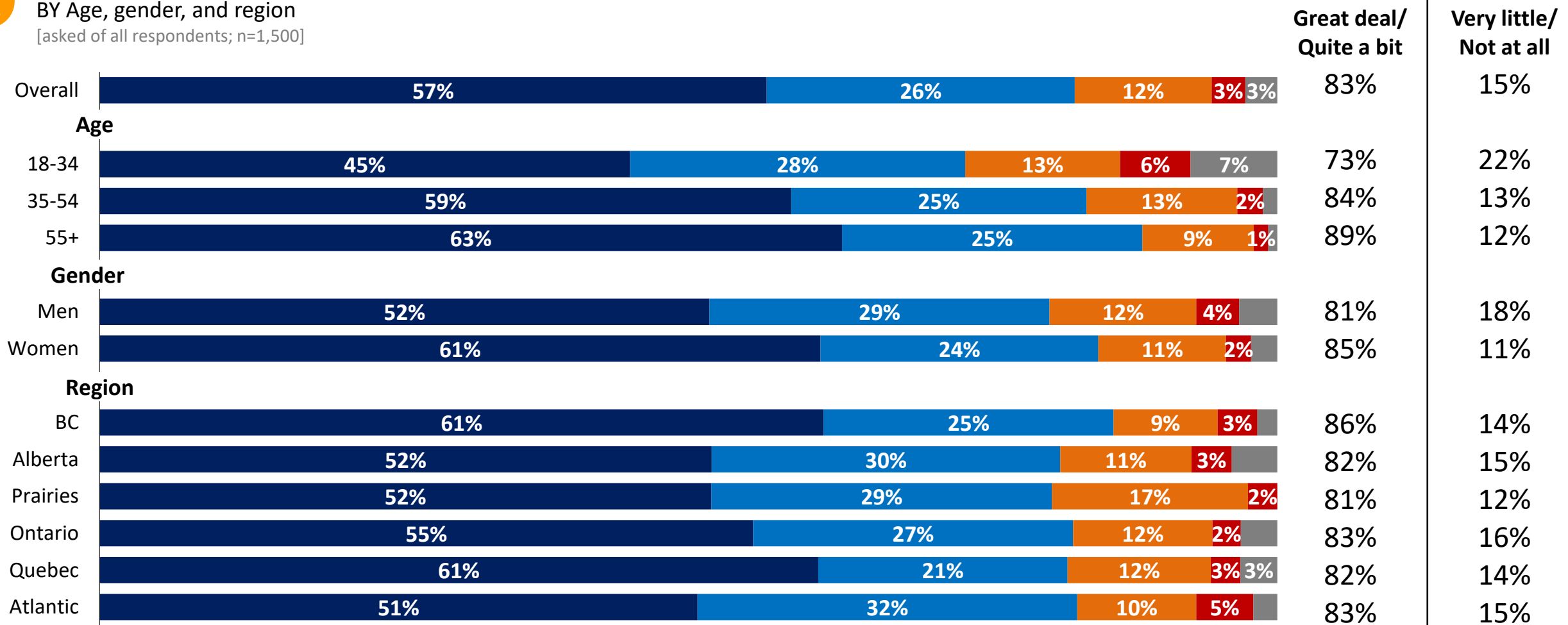
Behavioural Changes: 18-34-year-olds (73%) report the least amount of behavioural change of any demographic



How much have you changed your day-to-day behaviour in order to reduce the chance you will get COVID-19 or pass it to others?

BY Age, gender, and region

[asked of all respondents; n=1,500]



■ A great deal ■ Quite a bit ■ Very little ■ Not at all ■ Don't know

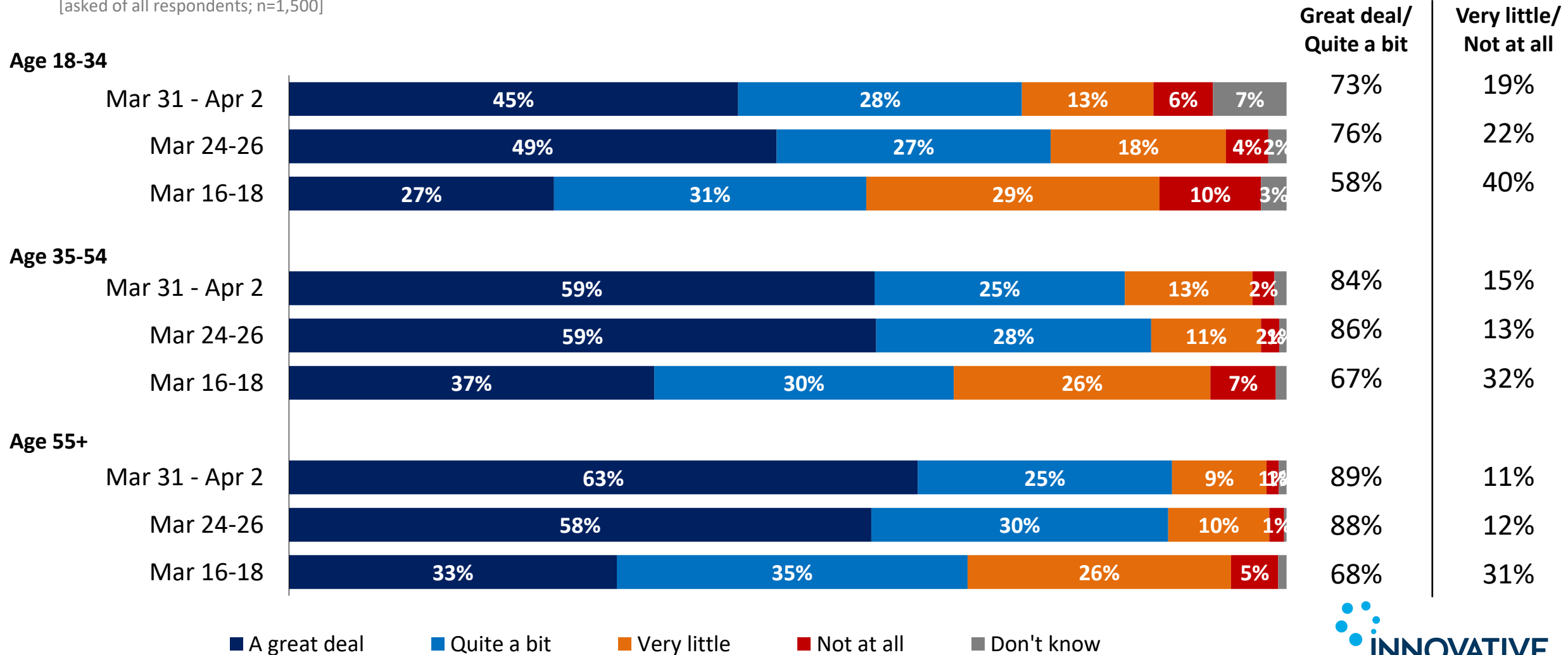
Behavioural Changes – Trend by age: Increasing numbers of those over 55 now say they have changed their behaviour “A great deal”¹⁸



How much have you changed your day-to-day behaviour in order to reduce the chance you will get COVID-19 or pass it to others?

BY Age

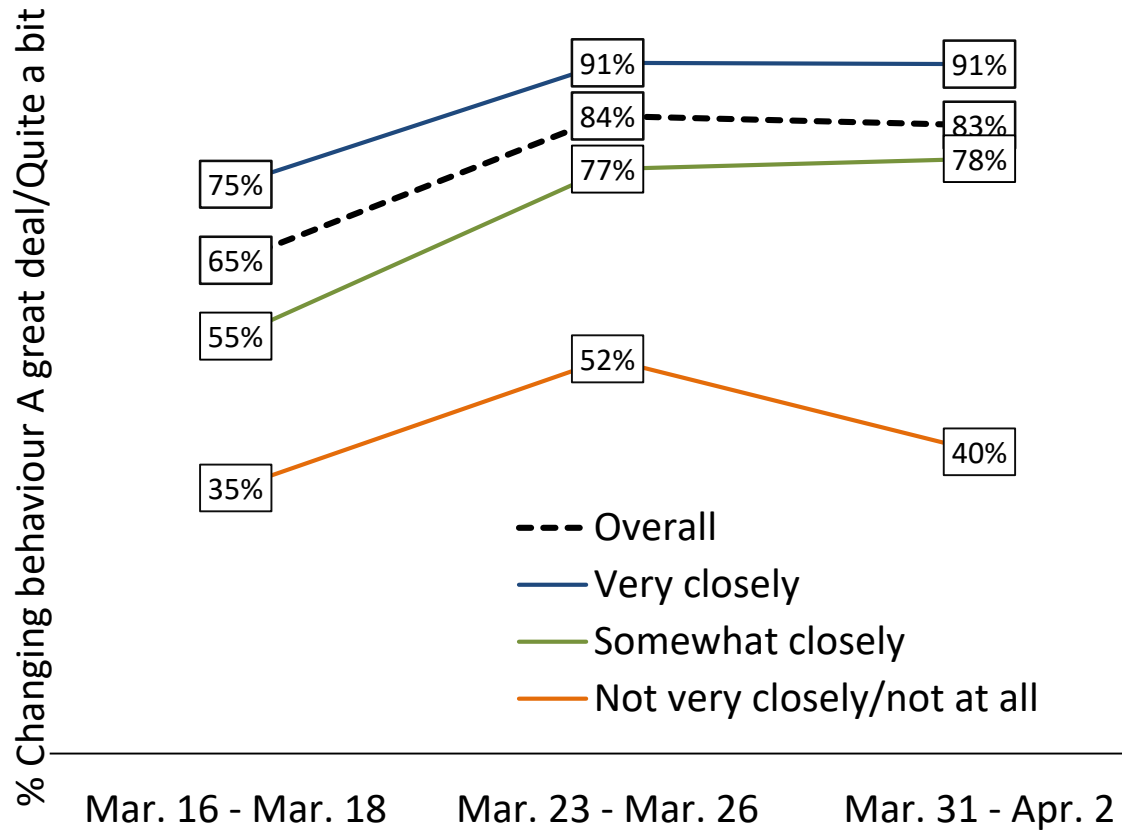
[asked of all respondents; n=1,500]



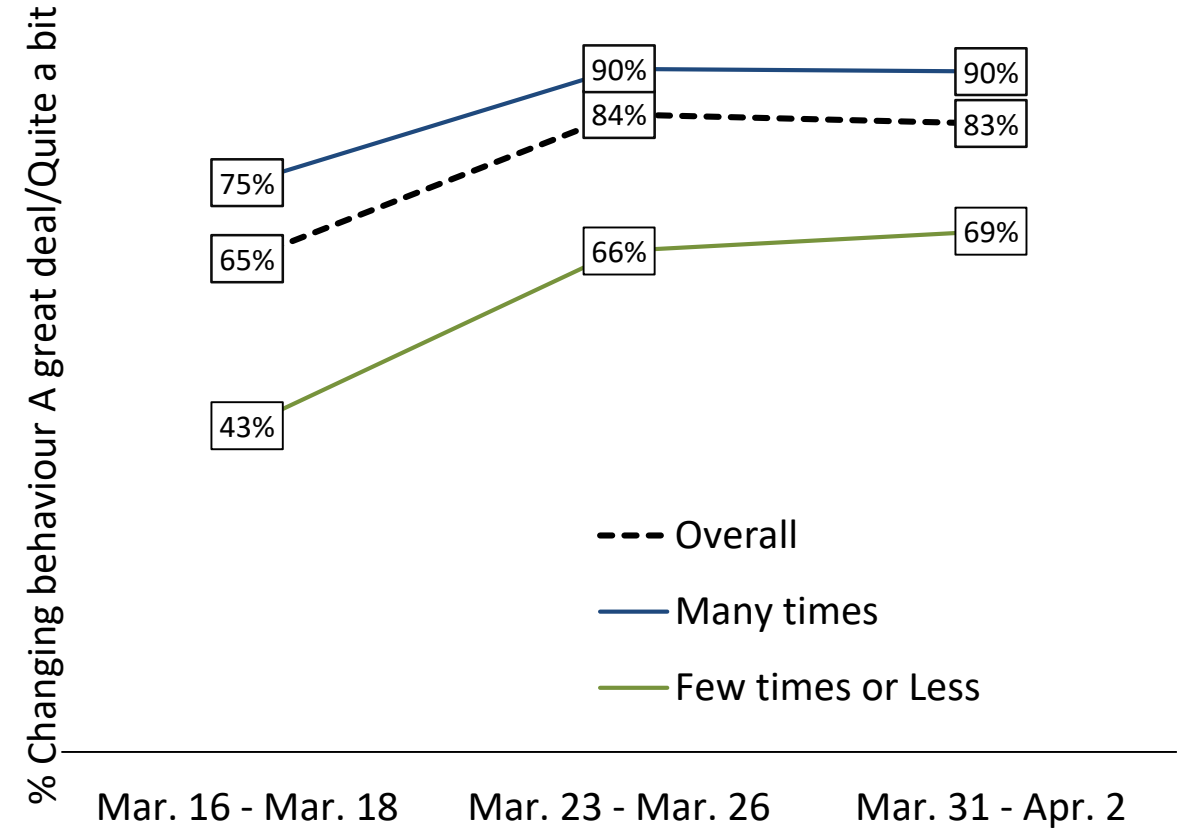
■ A great deal
 ■ Quite a bit
 ■ Very little
 ■ Not at all
 ■ Don't know

Behavioural Changes: The small group still not paying close attention are slipping back in their behaviour change, discussion helps.

Behaviour change BY Attention to COVID-19

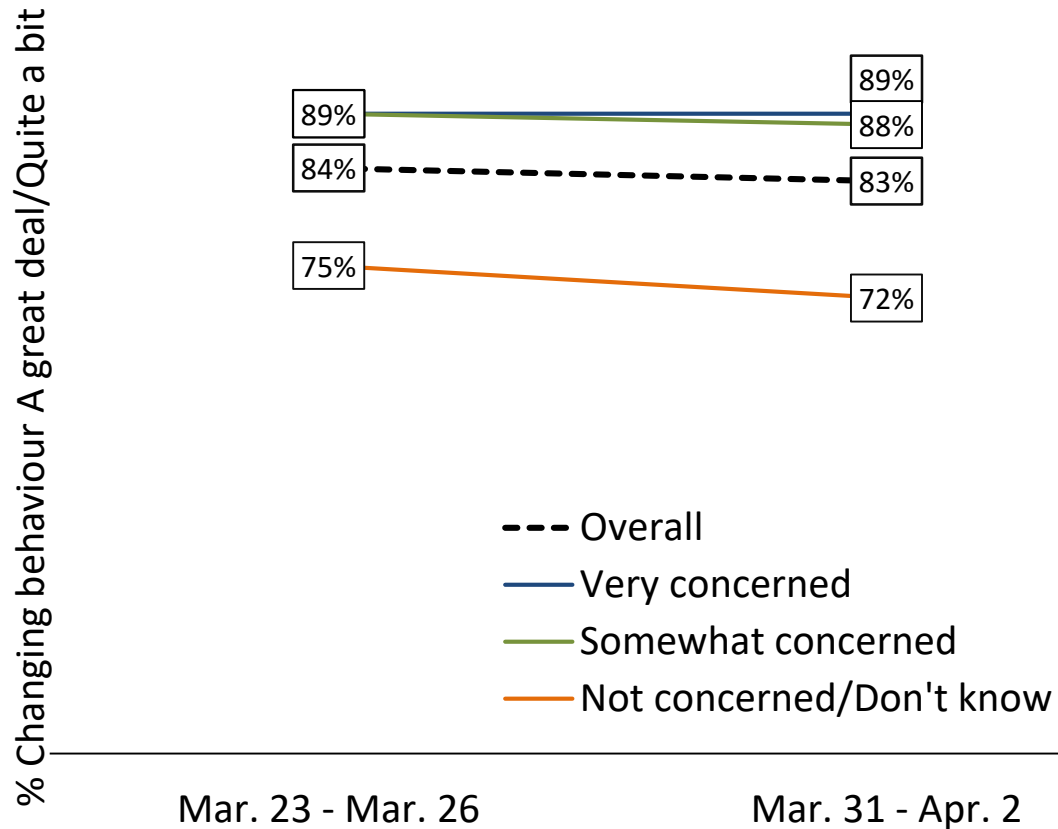


Behaviour change BY Discussion of COVID-19

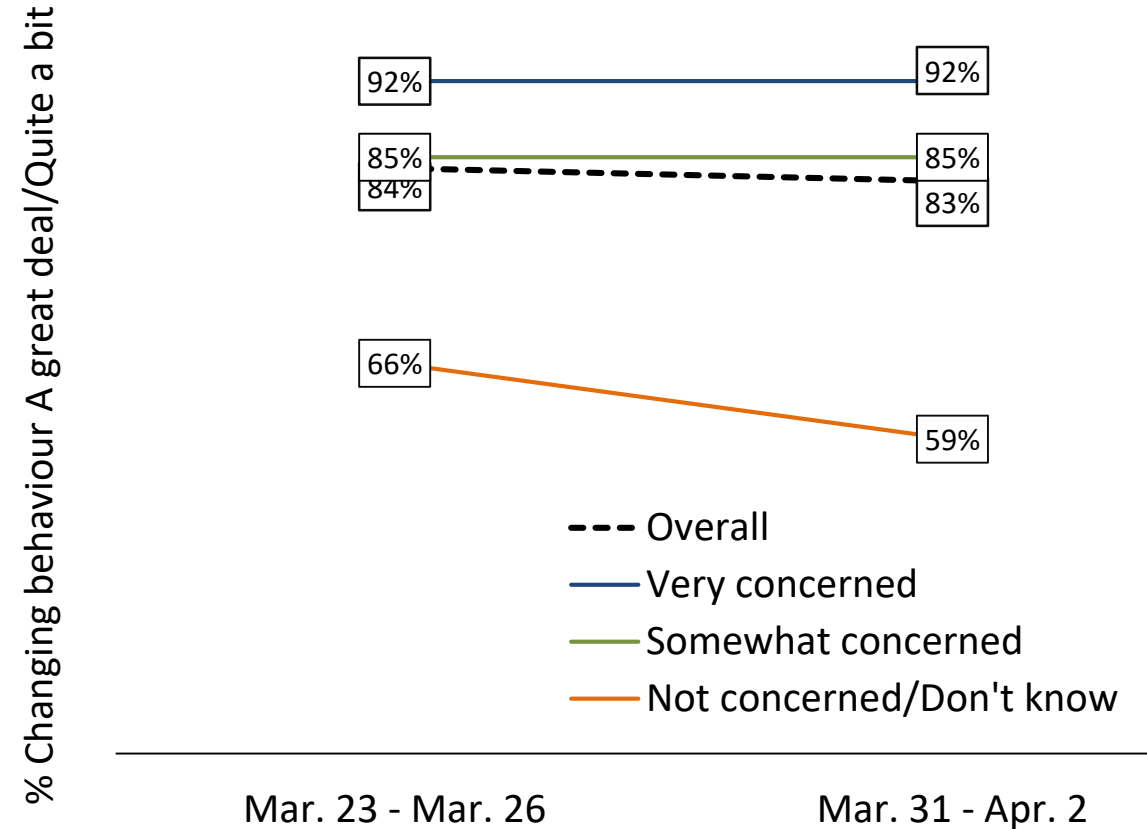


Behavioural Changes: some decline in reported behaviour change among those not concerned a friend/relative will get COVID-19

Behaviour change BY Concern I will get COVID-19



Behaviour change BY Concern a friend/relative will get COVID-19



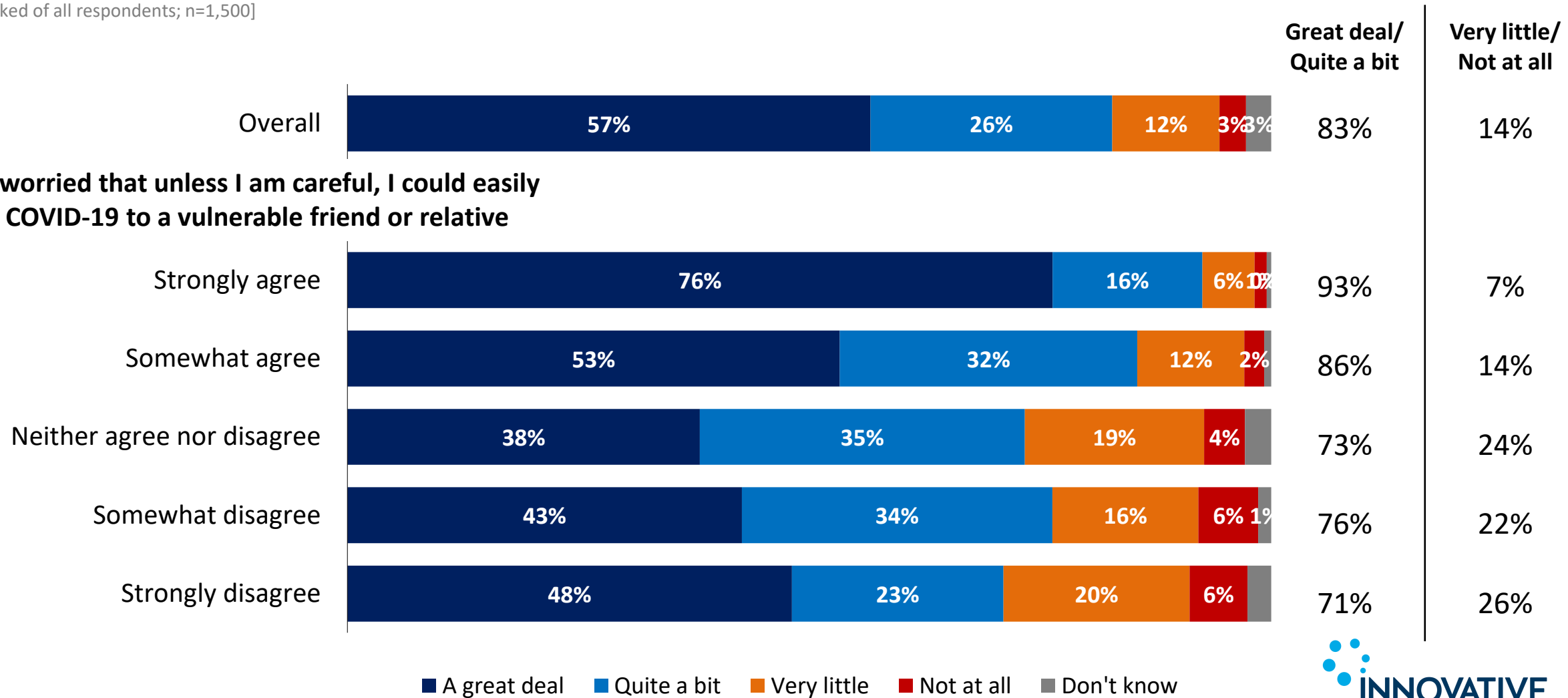
Behavioural Changes: Passion equals action. Change is highest among the most concerned about the need to avoid transmitting COVID-19



How much have you changed your day-to-day behaviour in order to reduce the chance you will get COVID-19 or pass it to others?

BY Concern about passing COVID to others

[asked of all respondents; n=1,500]



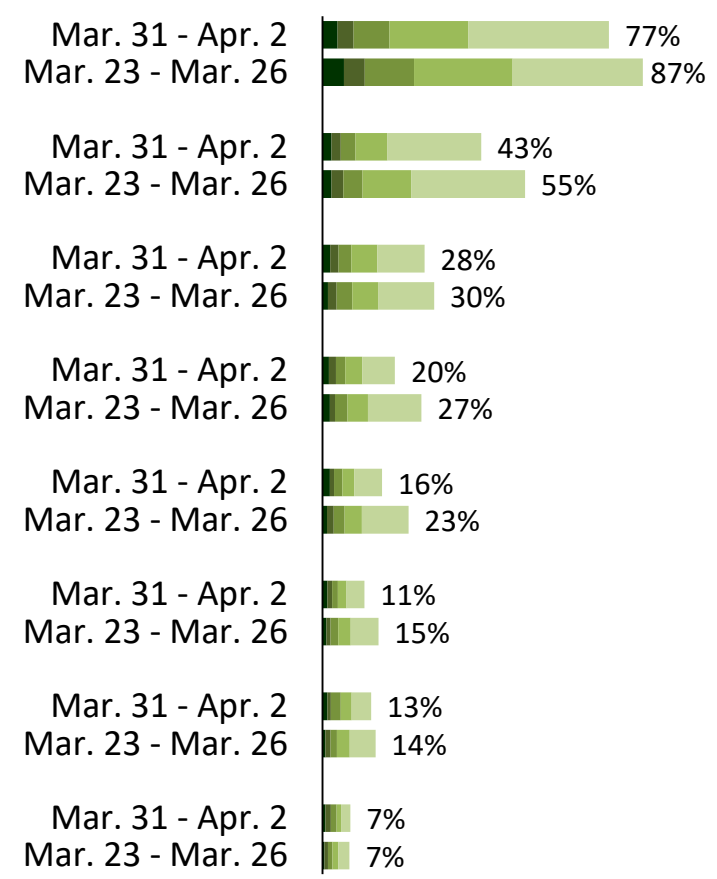
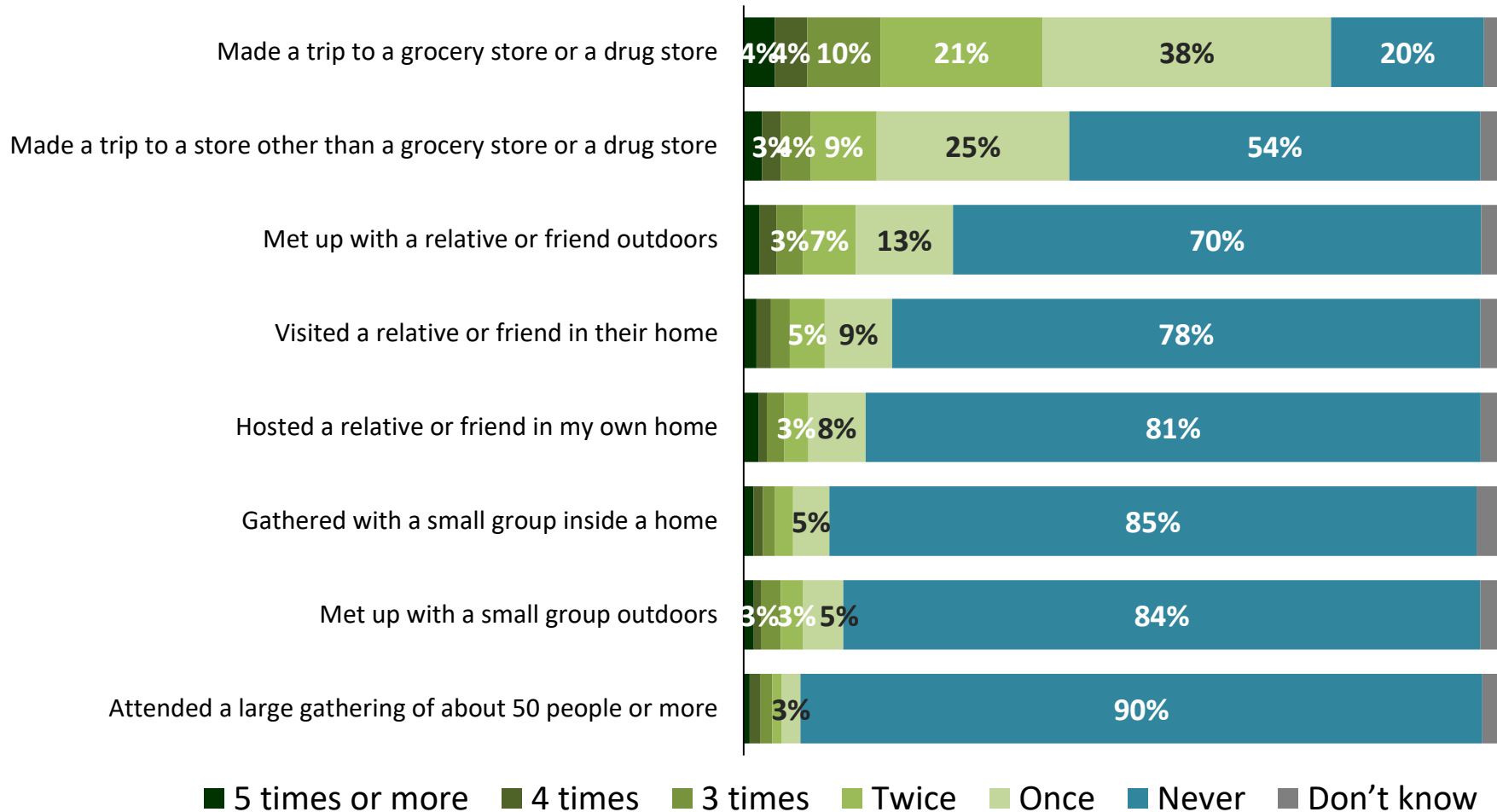
Physical Distancing: Canadians are shopping less, but many still say they are visiting and hosting friends



Over the past 7 days, how often have you done each of the following?
[asked of all respondents; n=1,500]

Current Wave: Mar. 31 – Apr. 2

Tracking: % at least once



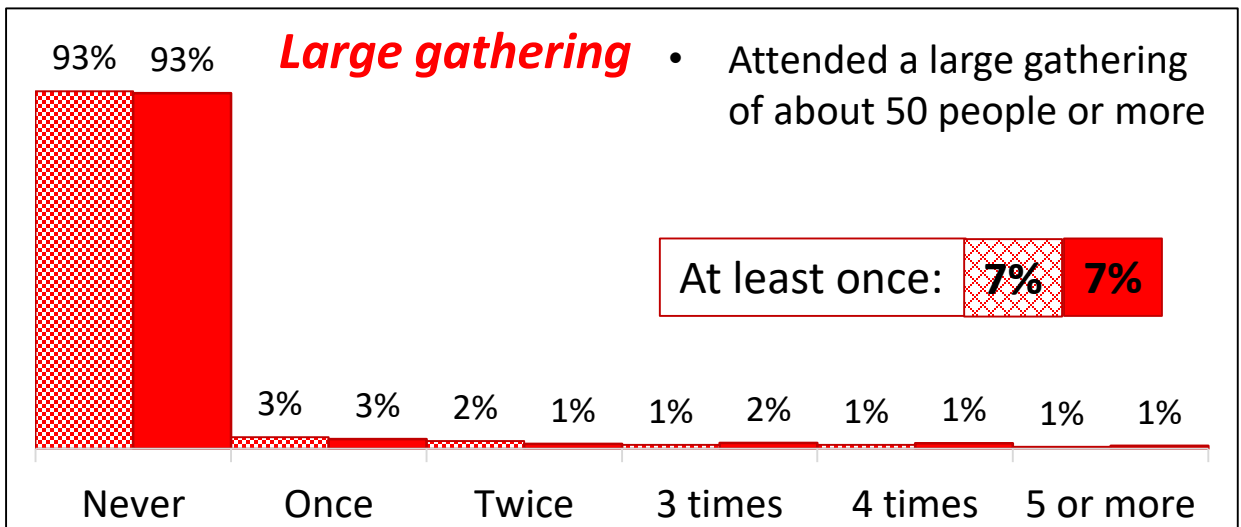
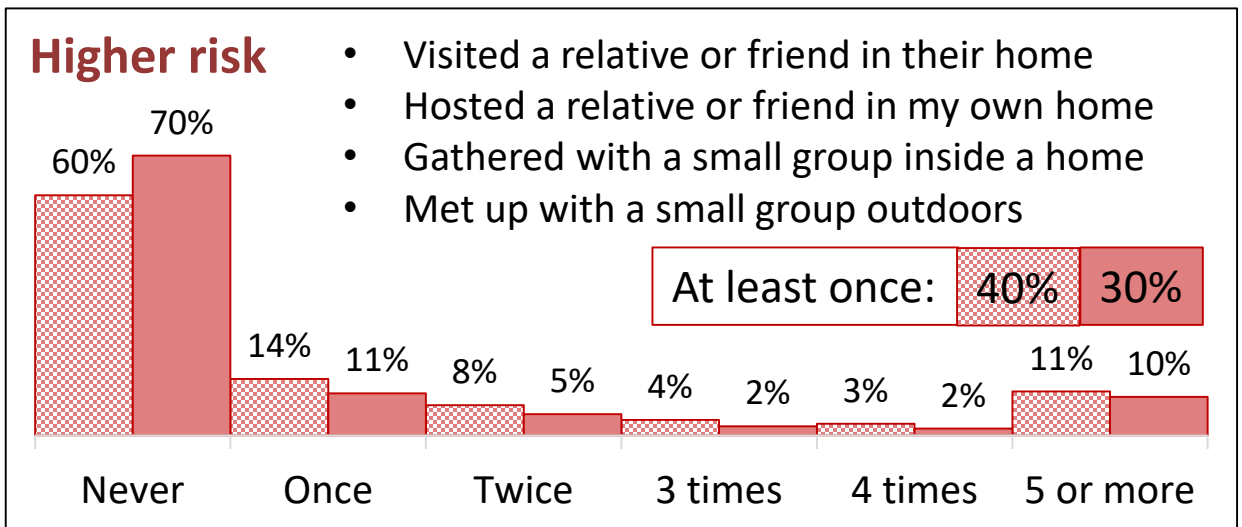
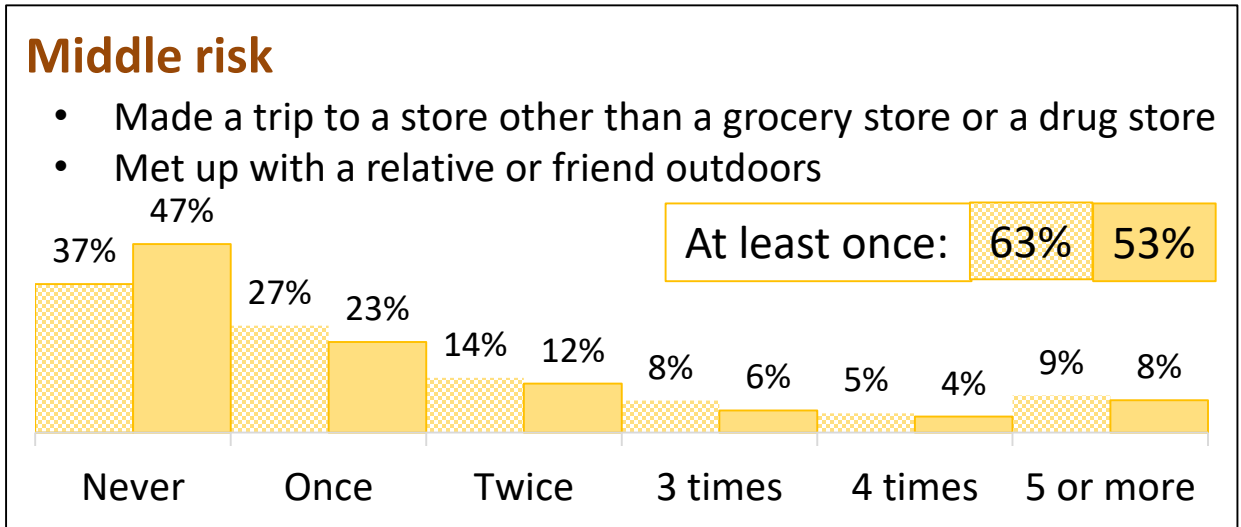
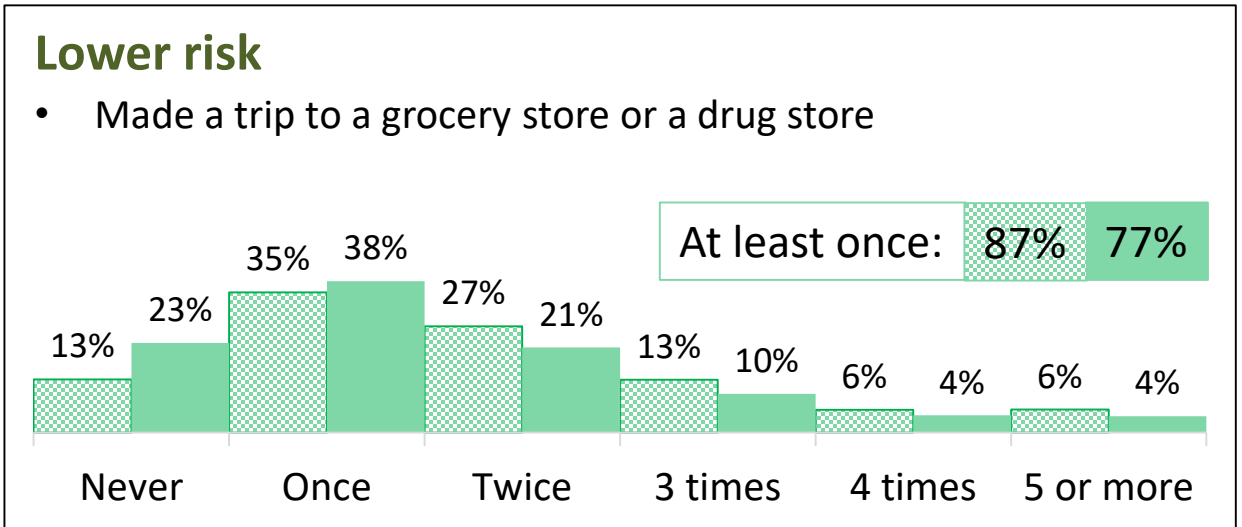
■ 5 times or more ■ 4 times ■ 3 times ■ Twice ■ Once ■ Never ■ Don't know

Note: Labels not shown for categories with a frequency of 2% or less

Physical Distancing: Since last week, physical distancing has increased across all categories but 30% are still having higher risks social visits

Q Over the past 7 days, how often have you done each of the following?
 [NOTE: Each behaviour asked separately, results for groups are summed; all respondents, n=1,500]

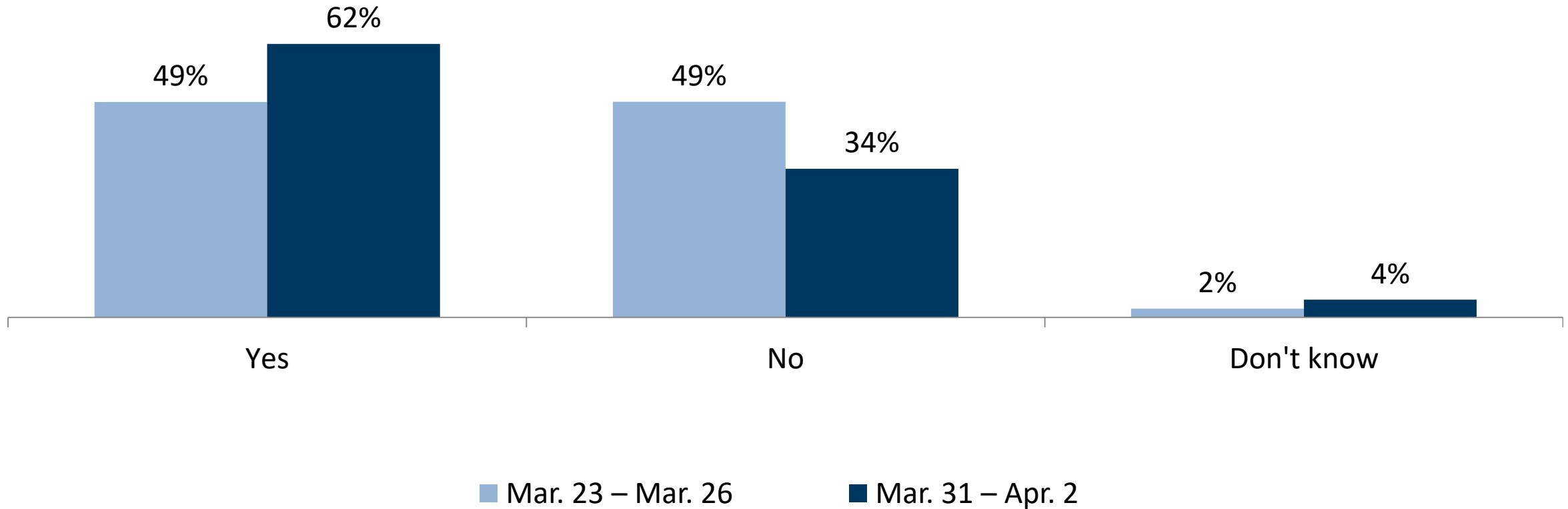
Mar 23 – Mar 26 Mar 31 – Apr 2



Self-Isolating: 62% say they are currently self-isolating – up from 49% last week



Are you currently in self-isolation or self-quarantine at home as part of the effort to reduce the spread of COVID-19?
[asked of all respondents; n=1,500]



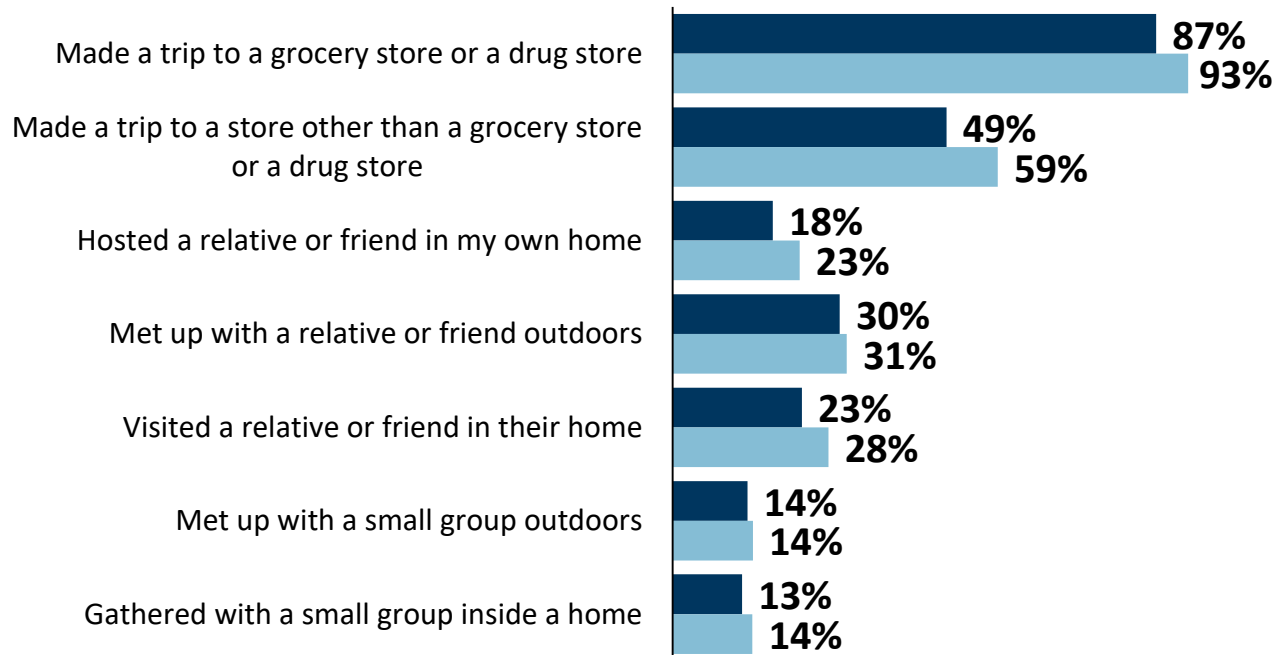
Self-Isolating: It appears Canadians don't think self-isolating means staying at home. Those self-isolating are almost as active as others.



Over the past 7 days, how often have you done each of the following? BY Self-isolating or not

[asked of all respondents; n=1,500]

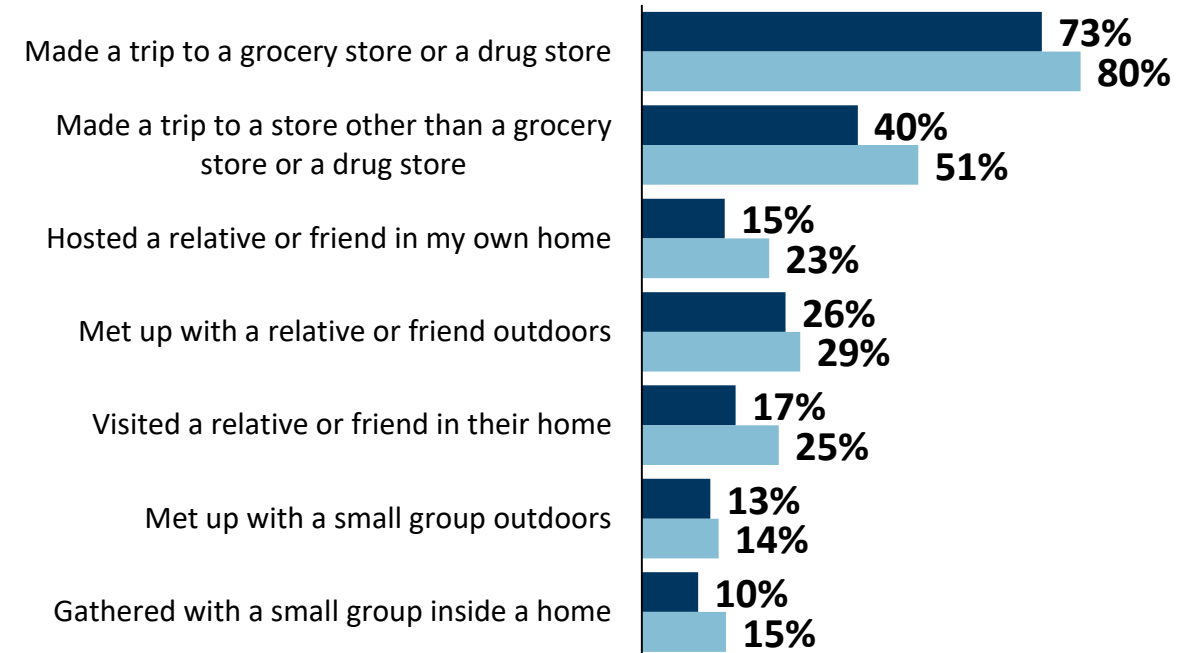
Among individuals who do NOT say that they are self-isolating



■ Mar. 31 - Apr. 2

■ Mar. 23 - Mar. 26

Among individuals who DO say that they are self-isolating



■ Mar. 31 - Apr. 2

■ Mar. 23 - Mar. 26

Returning Travelers:

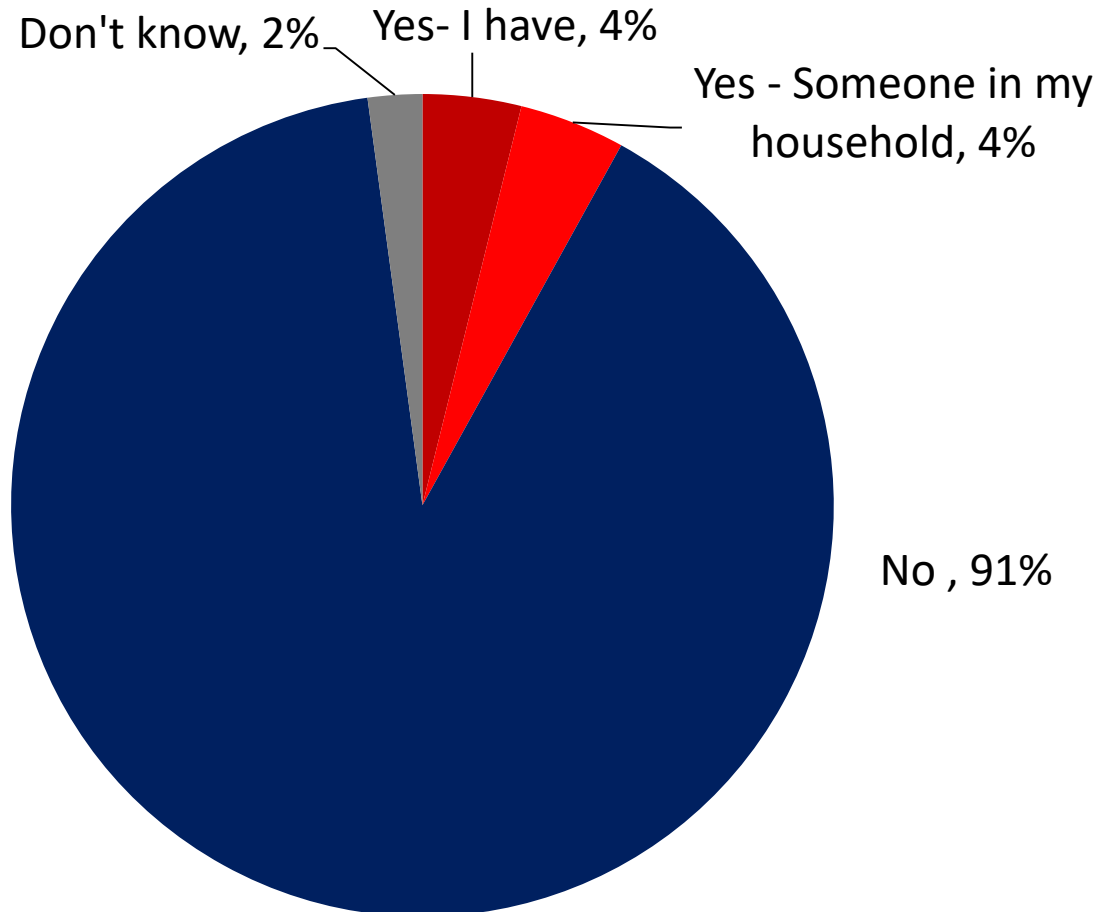
Returning travelers remain a problem. Half of returning travellers went shopping this week. A third hosted someone in their home and 39% went to someone else's home.

Travel: 4% of respondents say they traveled outside of Canada in the last 14 days; an additional 4% say someone in their household has



Have you or someone in your household travelled outside of Canada in the last 14 days?

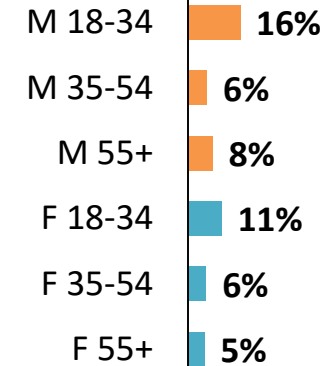
[asked of all respondents; n=1,500]



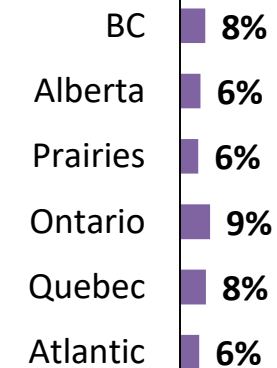
Segmentation

Respondents who say "Yes"

Age-Gender



Region

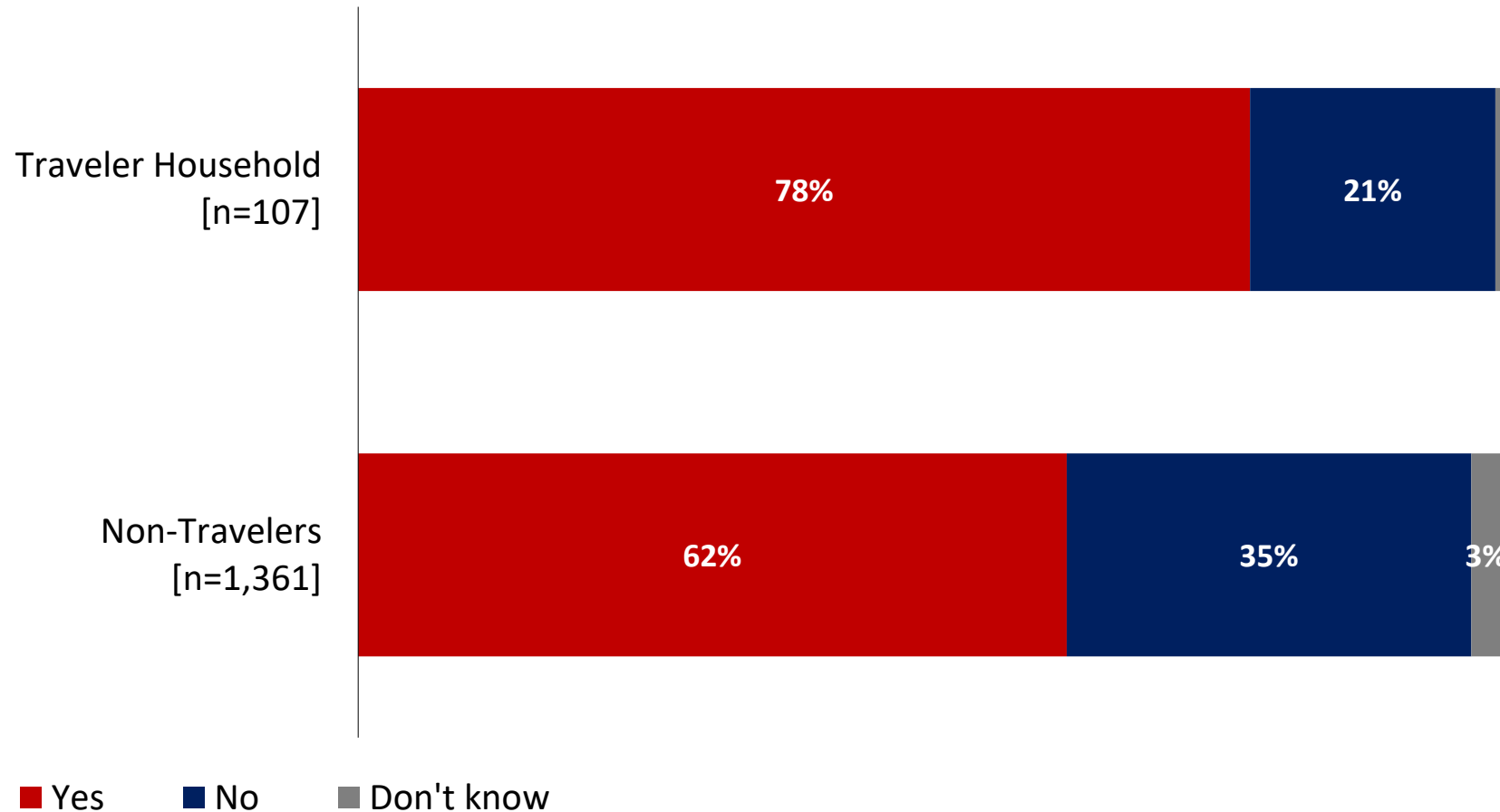


Travel and Self-Isolation: One in five (21%) people from traveler households say they are NOT self-isolating

Self-isolating



Are you currently in self-isolation or self-quarantine at home as part of the effort to reduce the spread of COVID-19?
[asked of all respondents; n=1,500]

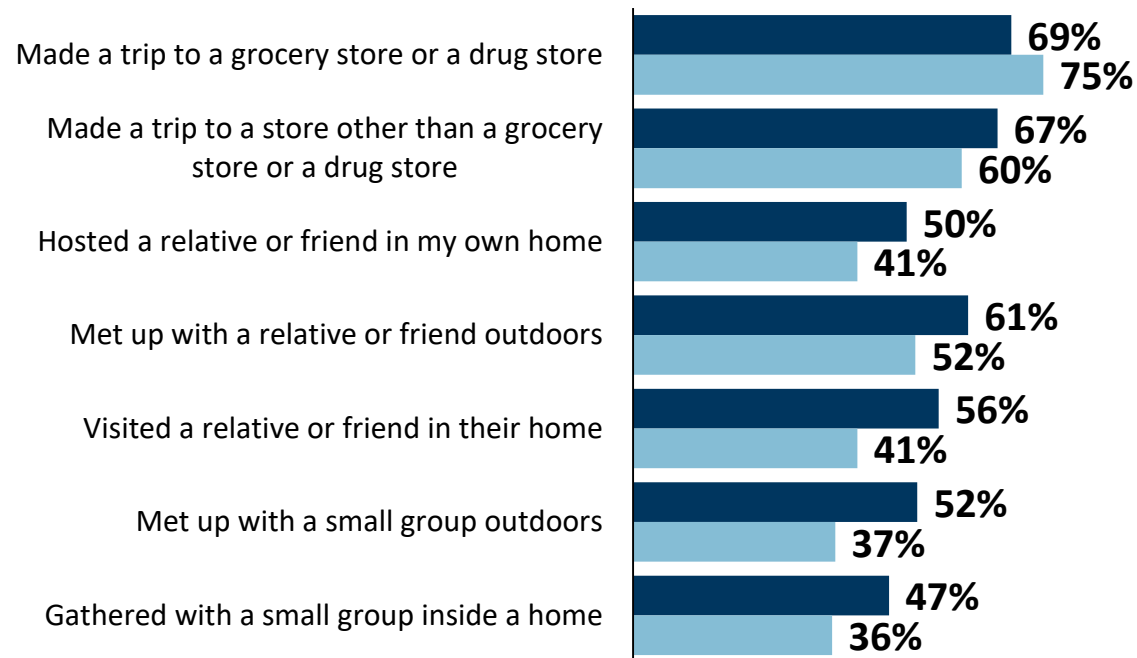


Physical Distancing by Travel: Households with a returnee only making slightly fewer shopping trips and social visits this week vs. last

Among households where someone has travelled outside of Canada



Over the past 7 days, how often have you done each of the following?
[asked of all respondents; showing those in a household where someone has travelled n=107]



■ Mar. 31 - Apr. 2 ■ Mar. 23 - Mar. 26

Among ONLY individuals who have travelled out of Canada themselves



Over the past 7 days, how often have you done each of the following?
[asked of all respondents; showing those who have travel outside Canada n=58]



■ Mar. 31 - Apr. 2

Government Approval:

Approval of the federal and provincial government response is largely steady from last week. About half of the Canadians say the governments have responded the right amount. For the remaining half, more say they are doing too little than too much. Most feel the list of essential services strikes a good balance. Concern the list is too broad highest in Ontario.

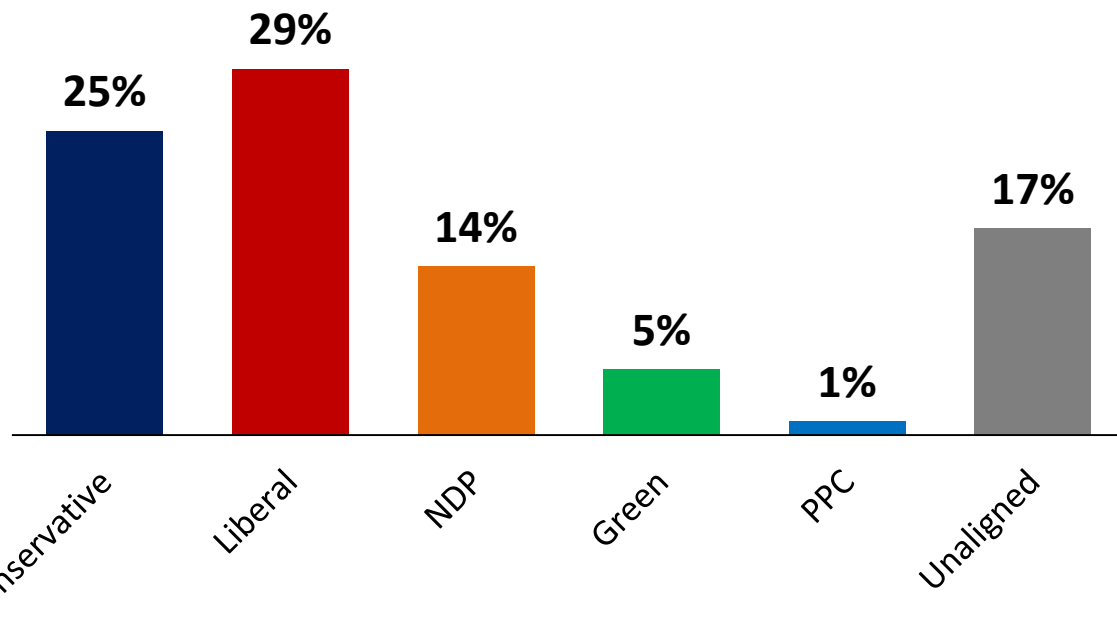
Federal Party ID: Liberals have a 8-pt lead on ID over Bloc in Quebec; Conservatives (25%) only 4 pts behind Liberals (29%) in Rest of Canada



Thinking about politics in Canada, generally speaking, do you think of yourself as a...

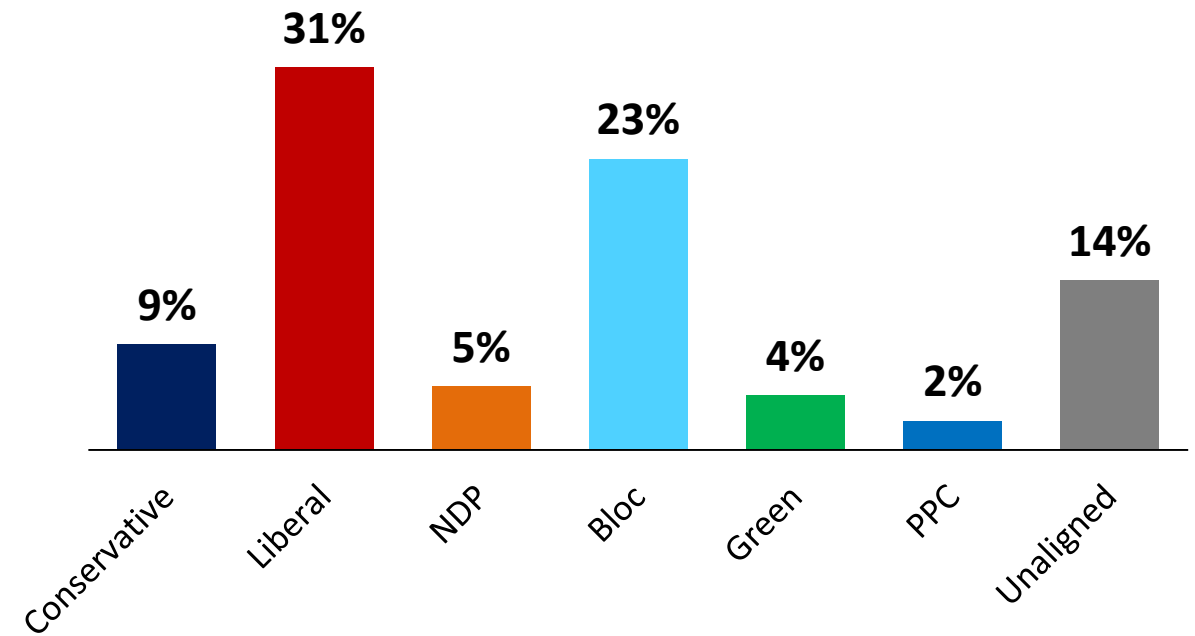
[asked of all respondents; n=1,500]

Rest of Canada



n=1,150

Quebec



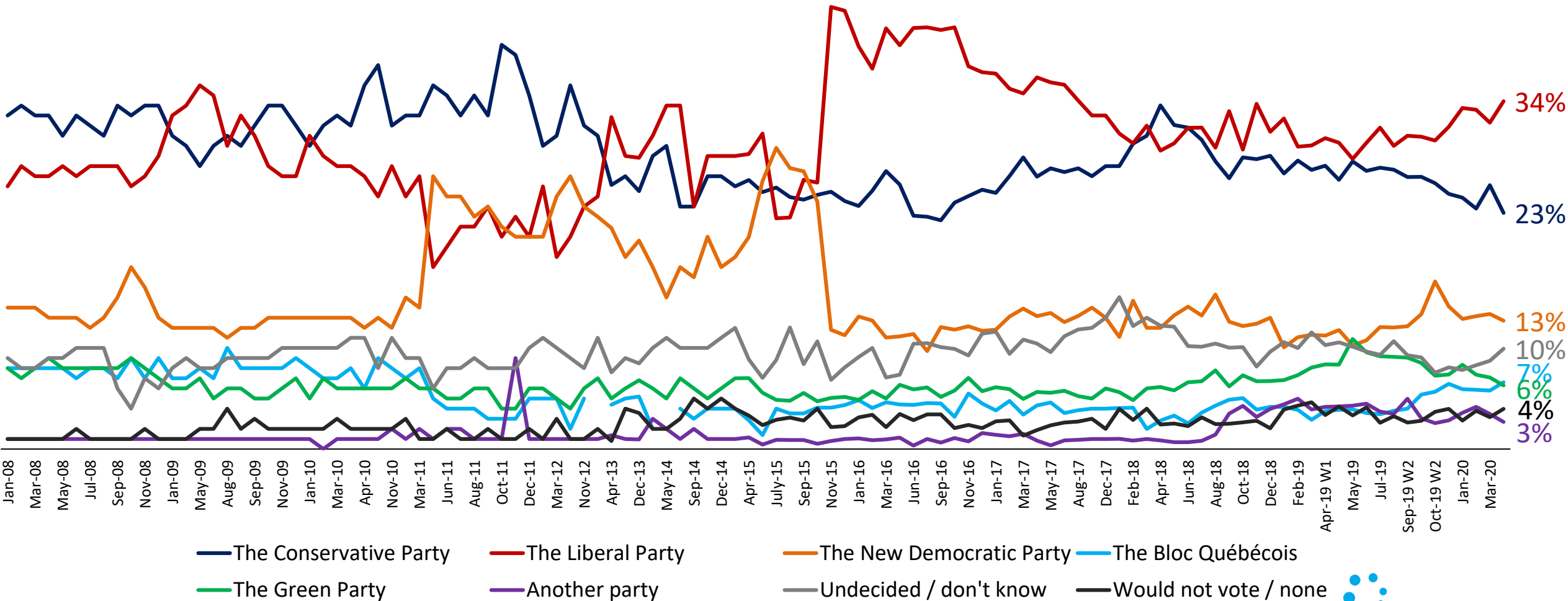
n=350

Combined Federal Vote: The Liberal Party (34%) continues lead over the Conservative Party (23%) while NDP trails (13%)



If a federal election were held today, which party would you vote for? In that case, which party do you lean toward slightly? [VOTE + LEAN]

[asked of all respondents; n=1,500]

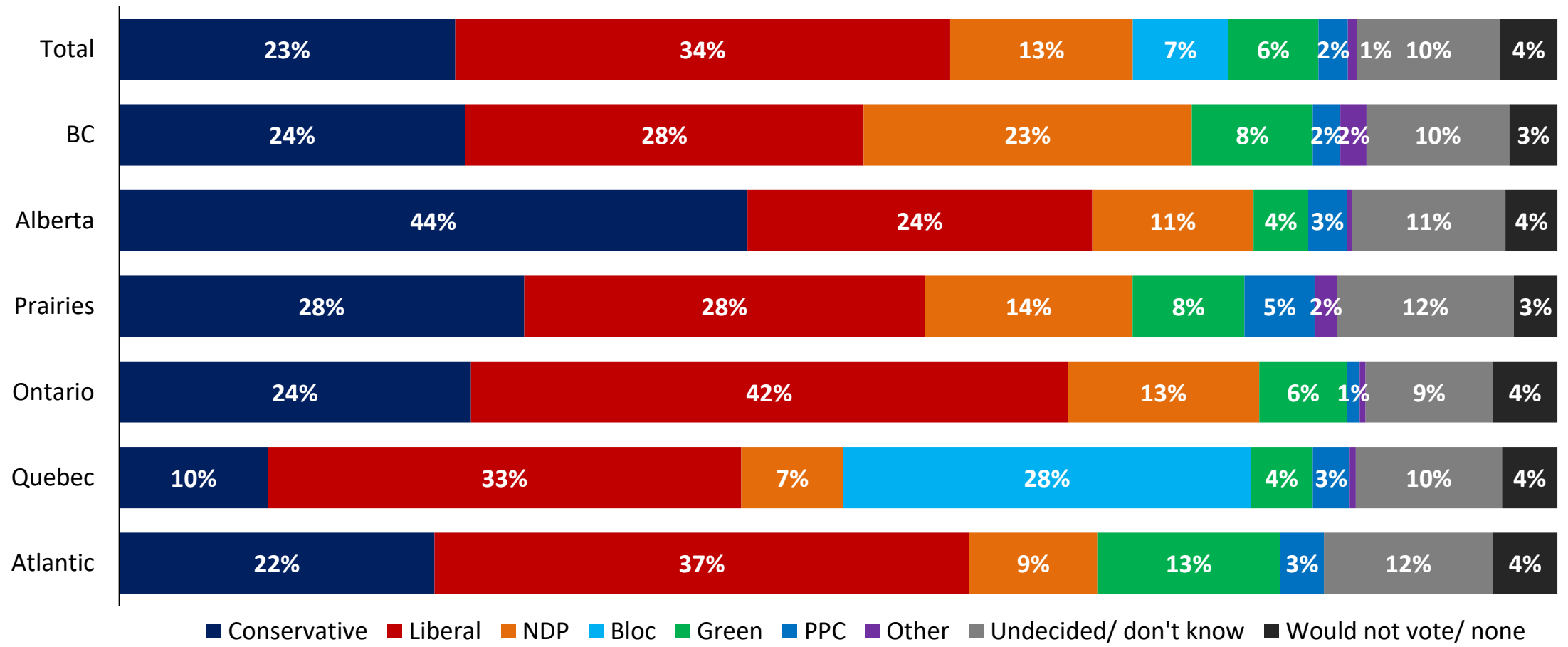


Note: People's Party of Canada has been added since September 2018, included in 'Another party'.

Combined Federal Vote by Region: The Liberal Party leads in Ontario and Atlantic while CPC leads in Alberta and Atlantic while CPC leads in Alberta



If a federal election were held today, which party would you vote for? In that case, which party do you lean toward slightly? [VOTE + LEAN]
 [asked of all respondents; n=1,500]



Govt Approval: Provincial approval (67%) still higher than federal approval (61%); both steady week-to-week

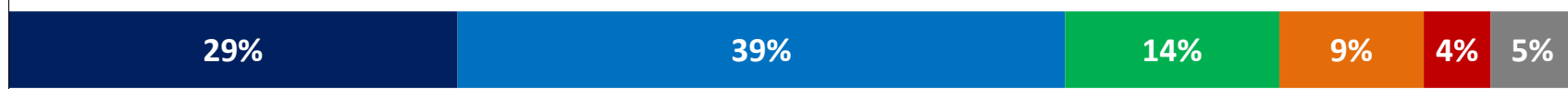
Provincial government approval



Do you approve or disapprove of the way the [PROV] Government has handled the outbreak of COVID-19?

[asked of all respondents; n=1,500]

Mar 31-Apr 2



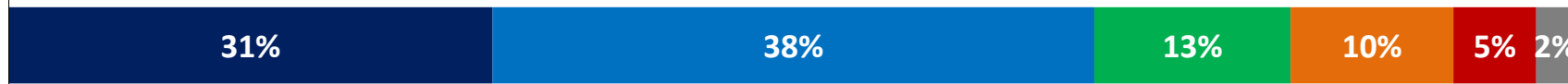
Approve

67%

Approve Δ

-2%

March 24-26



69%

+6%

March 16-18



63%

--

Federal government approval



Now thinking about the federal government, do you approve or disapprove of the way the federal government has handled the outbreak of COVID-19?

[asked of all respondents; n=1,500]

Mar 31-Apr 2



61%

+2%

March 24-26



59%

+9%

March 16-18



50%

--

- Strongly approve
- Somewhat approve
- Neither approve nor disapprove
- Somewhat disapprove
- Strongly disapprove
- Don't know



Note: Week-to-week changes of approval rating in red are significantly different from 0 at a 95% confidence level. Week-to-week changes in blue are significantly different from 0 at a 90% confidence level.

Federal Government Approval: Those in Alberta and in the Prairies are least likely to say they approval of the federal government

Federal government approval

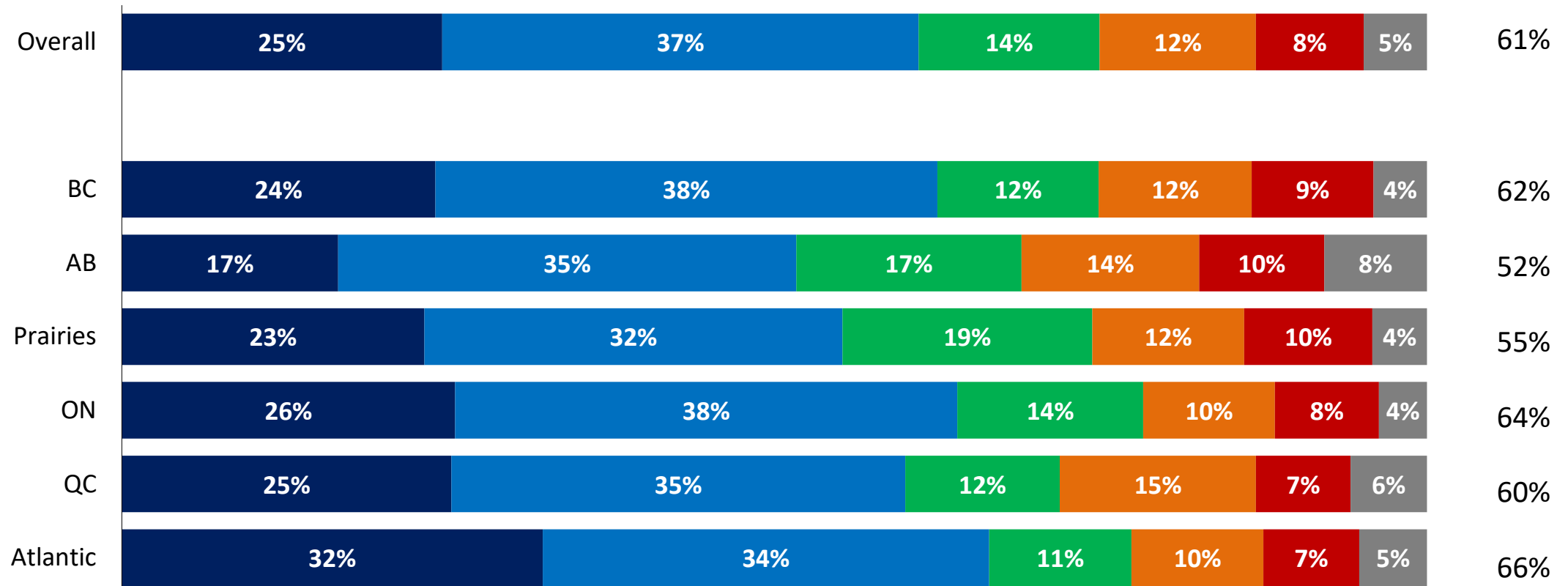


Now thinking about the federal government, do you approve or disapprove of the way the federal government has handled the outbreak of COVID-19?

BY Region

[asked of all respondents; n=1,500]

Approve



■ Strongly approve
 ■ Somewhat approve
 ■ Neither approve nor disapprove
■ Somewhat disapprove
 ■ Strongly disapprove
 ■ Don't know

Approval from BC is improving every week, and is now on par with the national average. Alberta and the Prairies dip marginally this week

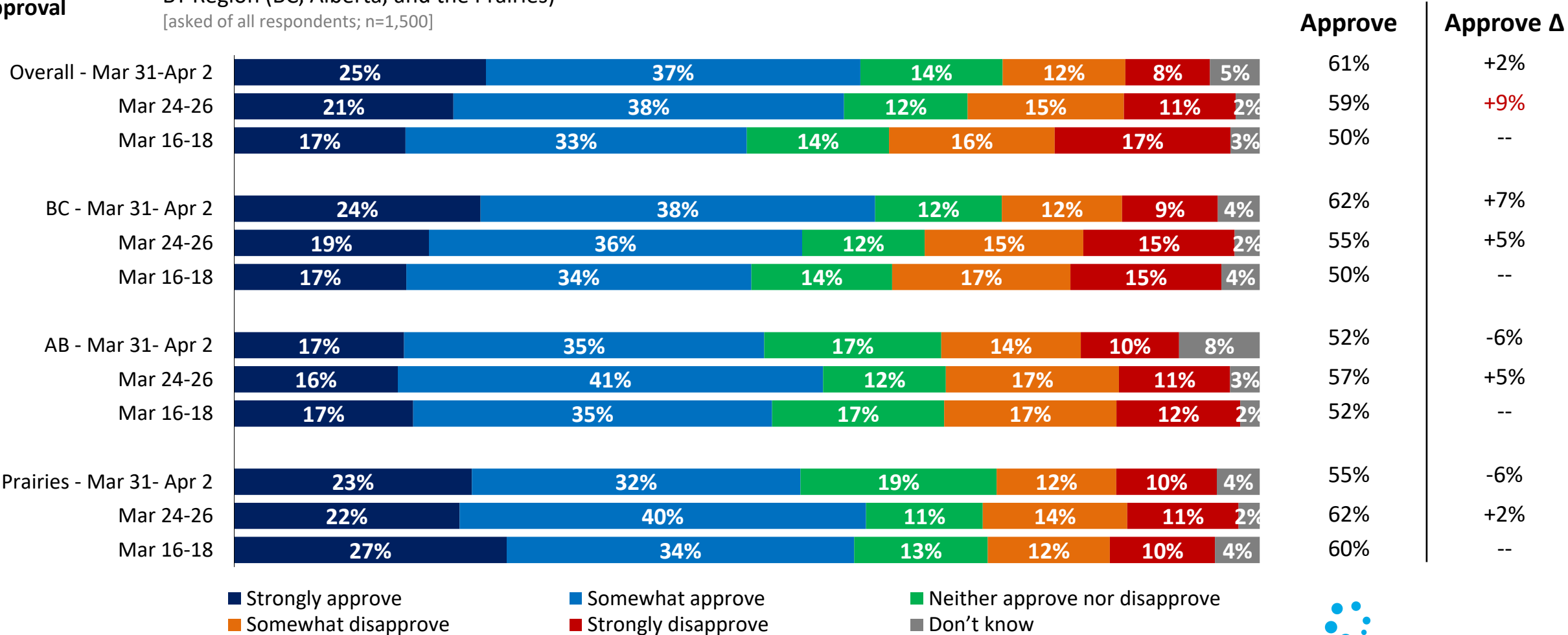
Federal government approval



Now thinking about the federal government, do you approve or disapprove of the way the federal government has handled the outbreak of COVID-19?

BY Region (BC, Alberta, and the Prairies)

[asked of all respondents; n=1,500]



Note: Week-to-week changes of approval rating in red are significantly different from 0 at a 95% confidence level. Week-to-week changes in blue are significantly different from 0 at a 90% confidence level.



Ontario and Québec are up directionally from last week, on par with the national average. Atlantic sees a slight dip this week

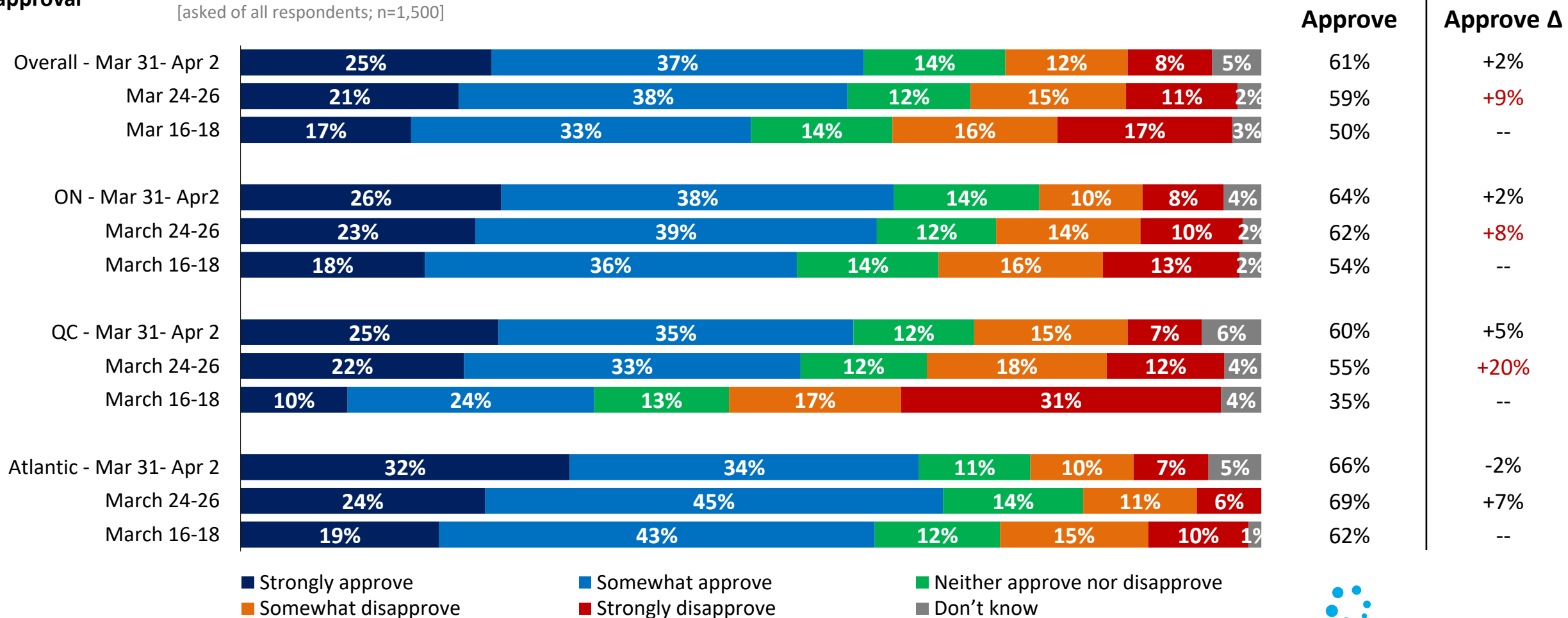
Federal government approval



Now thinking about the federal government, do you approve or disapprove of the way the federal government has handled the outbreak of COVID-19?

BY Region (Ontario, Quebec, and the Atlantic)

[asked of all respondents; n=1,500]



Note: Week-to-week changes of approval rating in red are significantly different from 0 at a 95% confidence level.

Week-to-week changes in blue are significantly different from 0 at a 90% confidence level.

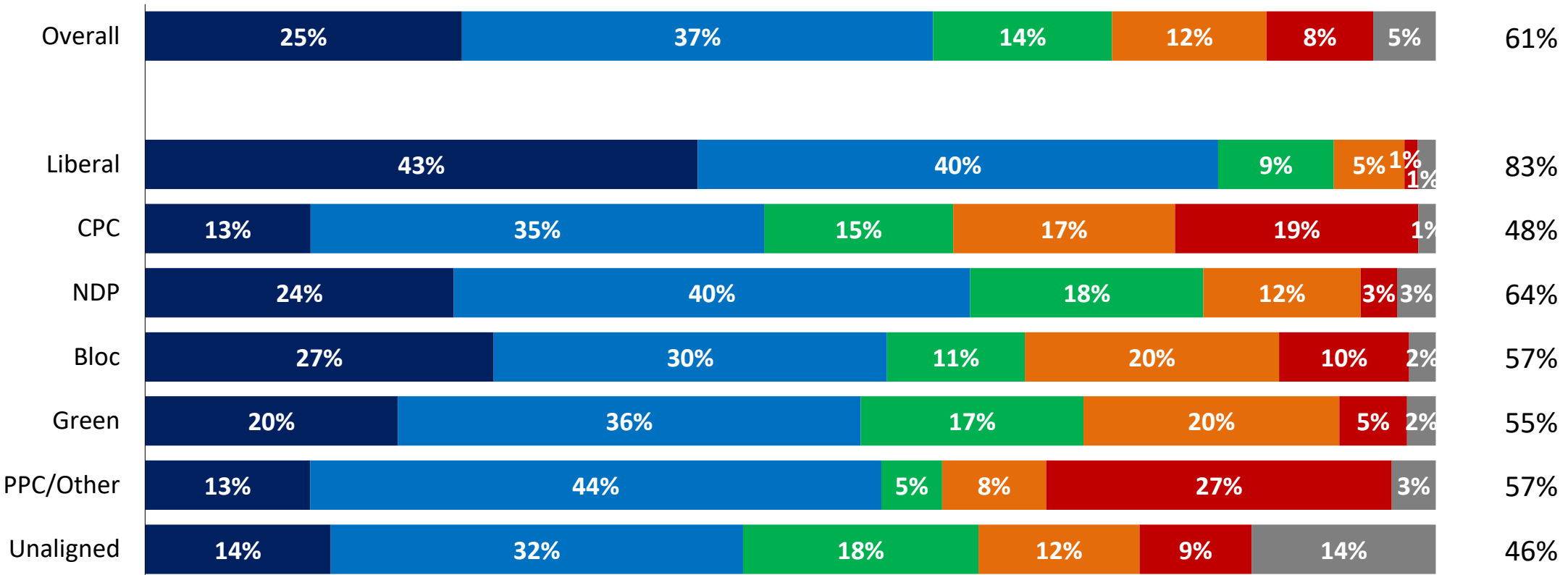
Federal Approval by Party ID: Approval ratings among Bloc and NDP partisans are comparable to the national average

Federal government approval



Now thinking about the federal government, do you approve or disapprove of the way the federal government has handled the outbreak of COVID-19?
 BY Party ID
 [asked of all respondents; n=1,500]

Approve



■ Strongly approve
 ■ Somewhat approve
 ■ Neither approve nor disapprove
■ Somewhat disapprove
 ■ Strongly disapprove
 ■ Don't know



Provincial Government Approval: Provincial approval is lowest in Prairies (58%) and Alberta (59%); around 7-in-10 approve in all other regions

Provincial government approval

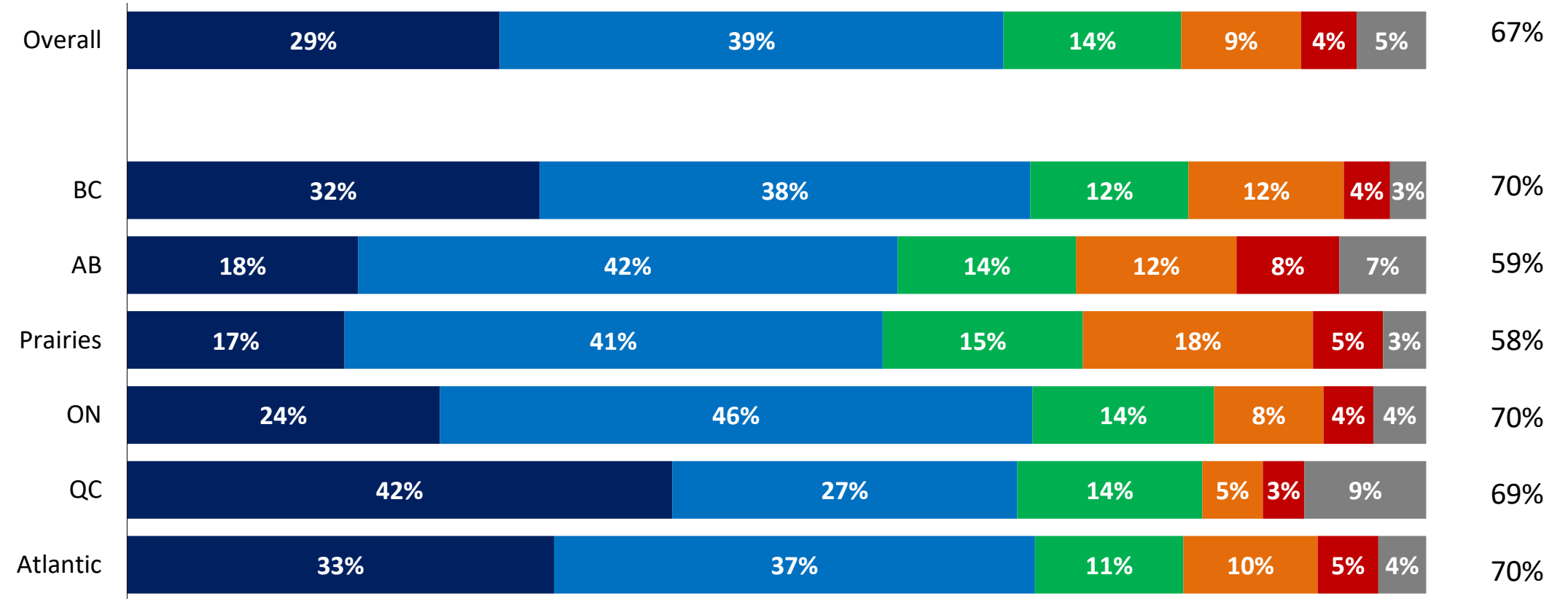


Do you approve or disapprove of the way the [PROV] Government has handled the outbreak of COVID-19?

BY Region

[asked of all respondents; n=1,500]

Approve



■ Strongly approve
 ■ Somewhat approve
 ■ Neither approve nor disapprove
■ Somewhat disapprove
 ■ Strongly disapprove
 ■ Don't know



Approval of the BC Government sees a 7-point increase, yet the approval of the Alberta Government dips 6 points week-to-week

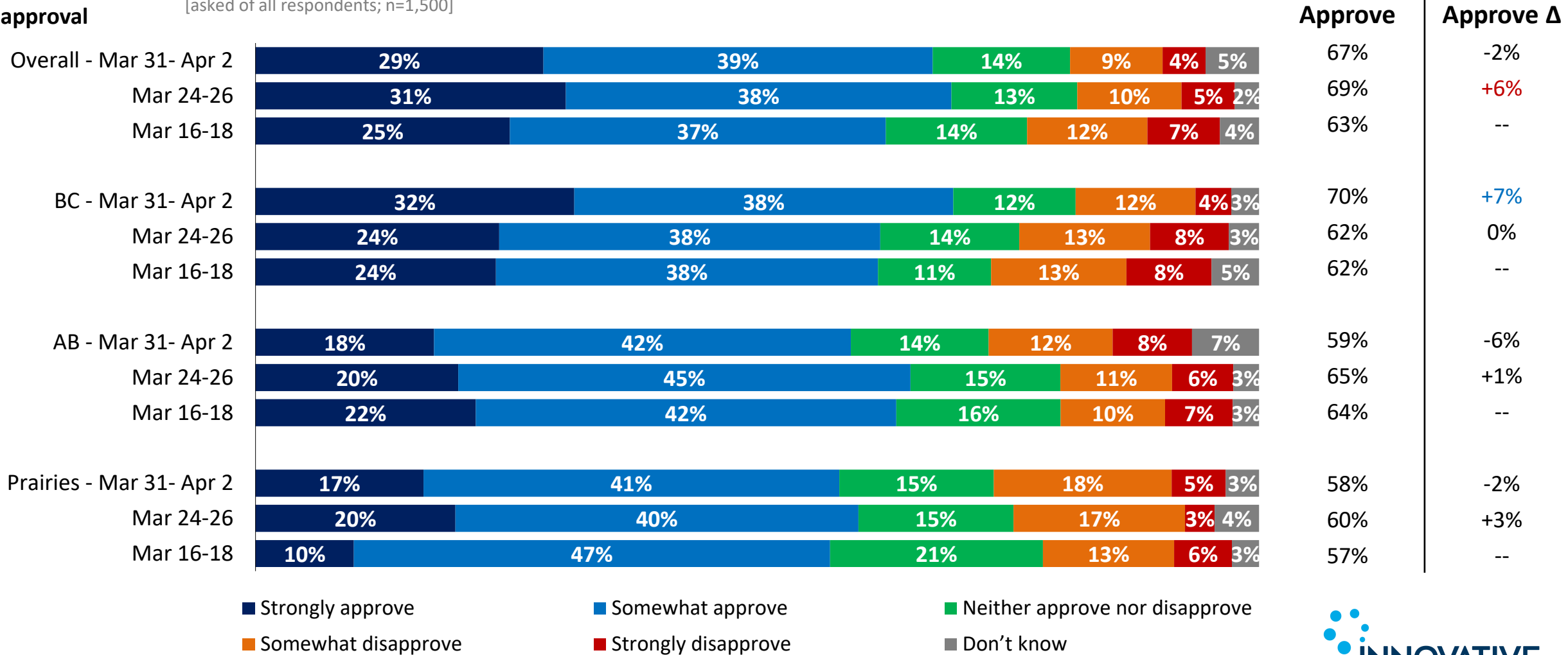
Provincial government approval



Do you approve or disapprove of the way the [PROV] Government has handled the outbreak of COVID-19?

BY Region (BC, Alberta, and the Prairies)

[asked of all respondents; n=1,500]



Note: Week-to-week changes of approval rating in red are significantly different from 0 at a 95% confidence level. Week-to-week changes in blue are significantly different from 0 at a 90% confidence level.

Approval of the Quebec Government sees a sharp decline week-to-week, now on par with the national average

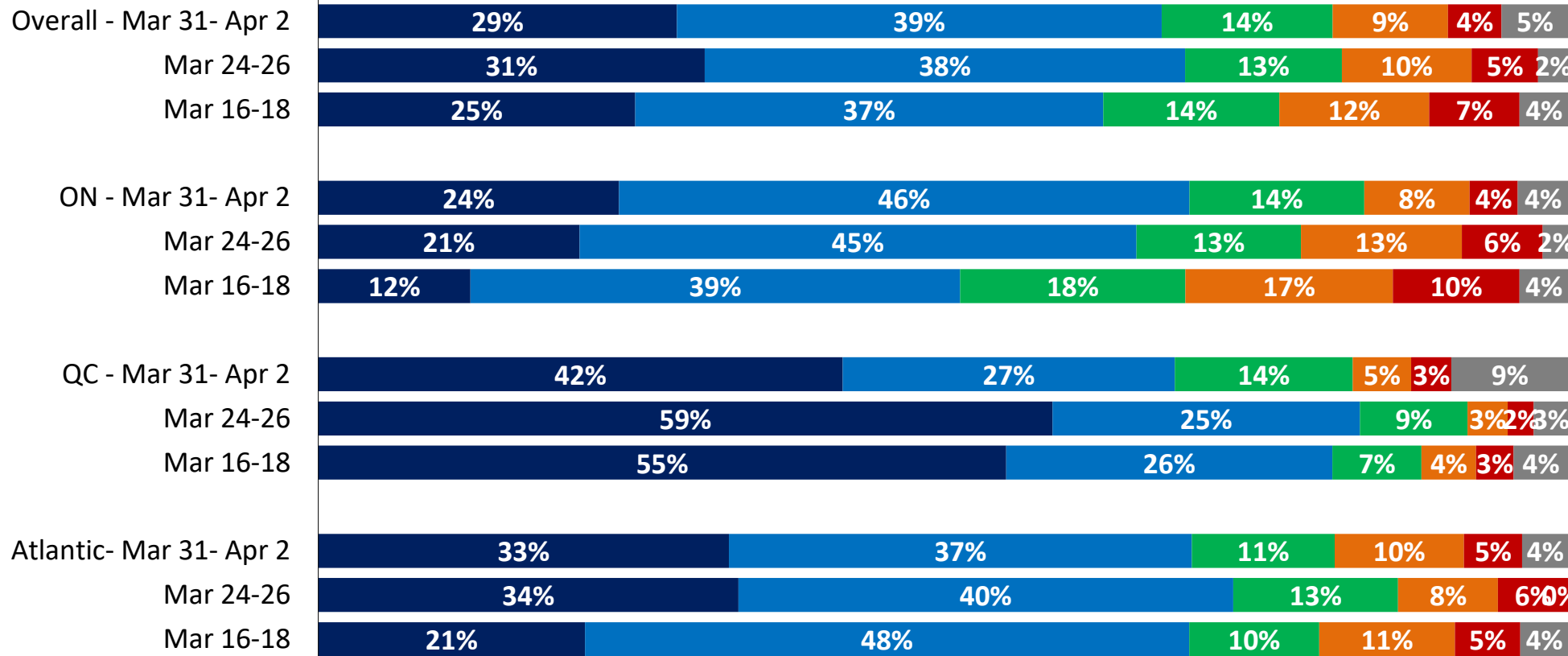
Provincial government approval



Do you approve or disapprove of the way the [PROV] Government has handled the outbreak of COVID-19?

BY Region (Ontario, Quebec, and the Atlantic)

[asked of all respondents; n=1,500]



Approve | Approve Δ

67%	-2%
69%	+6%
63%	--
70%	+4%
65%	+14%
51%	--
69%	-15%
83%	+2%
81%	--
70%	-3%
73%	+3%
70%	--

■ Strongly approve
 ■ Somewhat approve
 ■ Neither approve nor disapprove
■ Somewhat disapprove
 ■ Strongly disapprove
 ■ Don't know



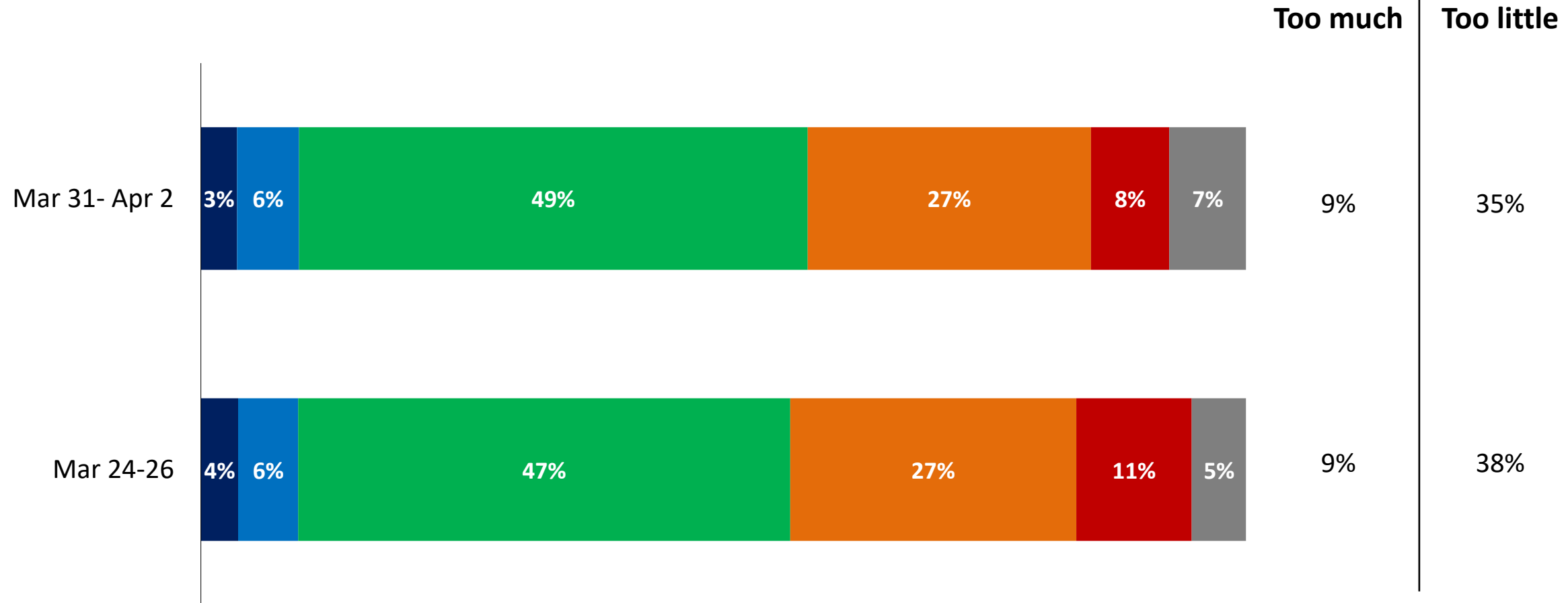
Note: Week-to-week changes of approval rating in red are significantly different from 0 at a 95% confidence level. Week-to-week changes in blue are significantly different from 0 at a 90% confidence level.

Half say that the govt has responded the right amount. For others, more want to see more done. Results are consistent week-to-week



Would you say that in response to the COVID-19 outbreak so far governments have done too much, too little, or the right amount?

[asked of all respondents; n=1,500]



■ Far too much ■ Somewhat too much ■ The right amount ■ Somewhat too little ■ Far too little ■ Don't know

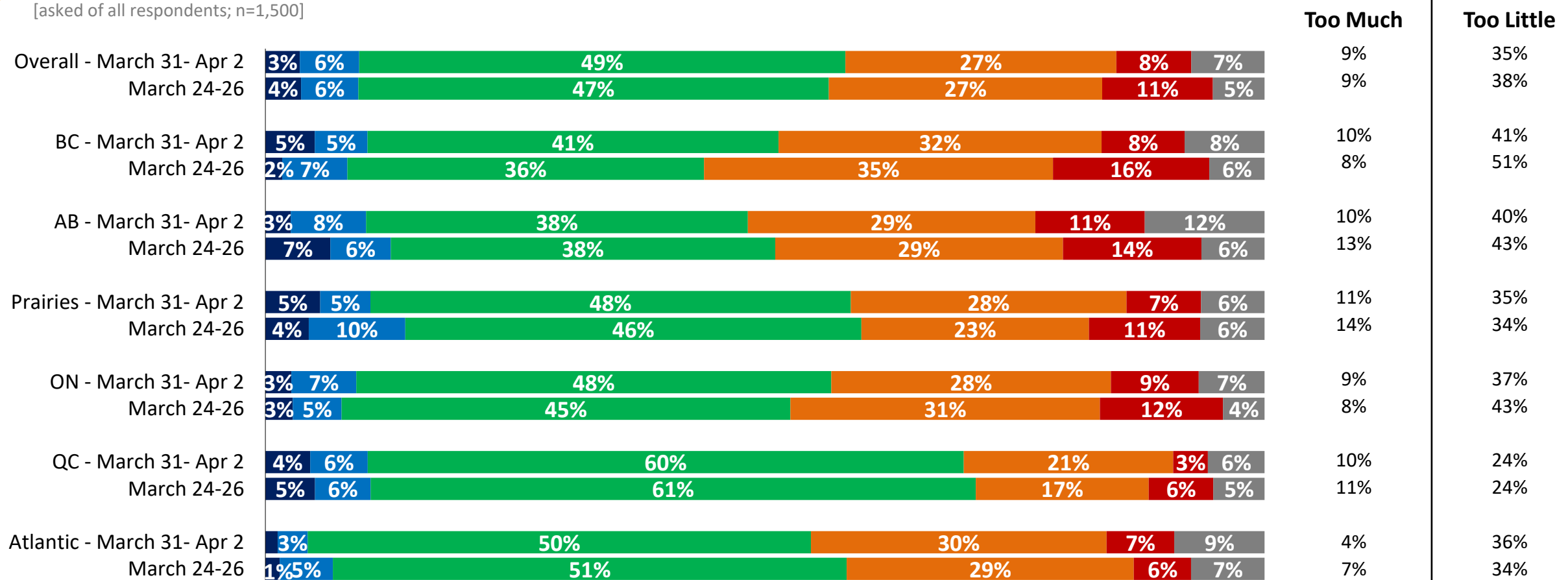
Response from Govts: Those in BC are now 10 points *less* likely to say governments are doing “too little” (41%) than last week (51%)



Would you say that in response to the COVID-19 outbreak so far governments have done too much, too little, or the right amount?

BY Region

[asked of all respondents; n=1,500]



■ Far too much ■ Somewhat too much ■ The right amount ■ Somewhat too little ■ Far too little ■ Don't know

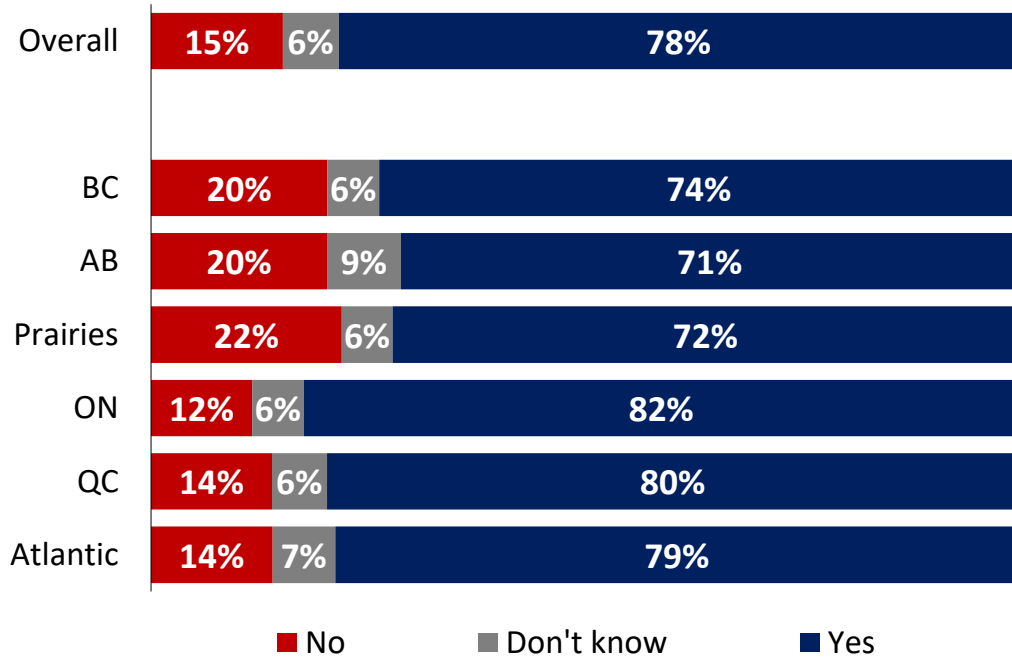


Most say provinces have found a good balance on essential services, but 38% of Ontarians said this week that their list was too broad

Q Many provinces have announced a list of essential services allowed to remain open during the COVID-19 pandemic.

Have you read, seen or heard anything about a list of essential services in your province?

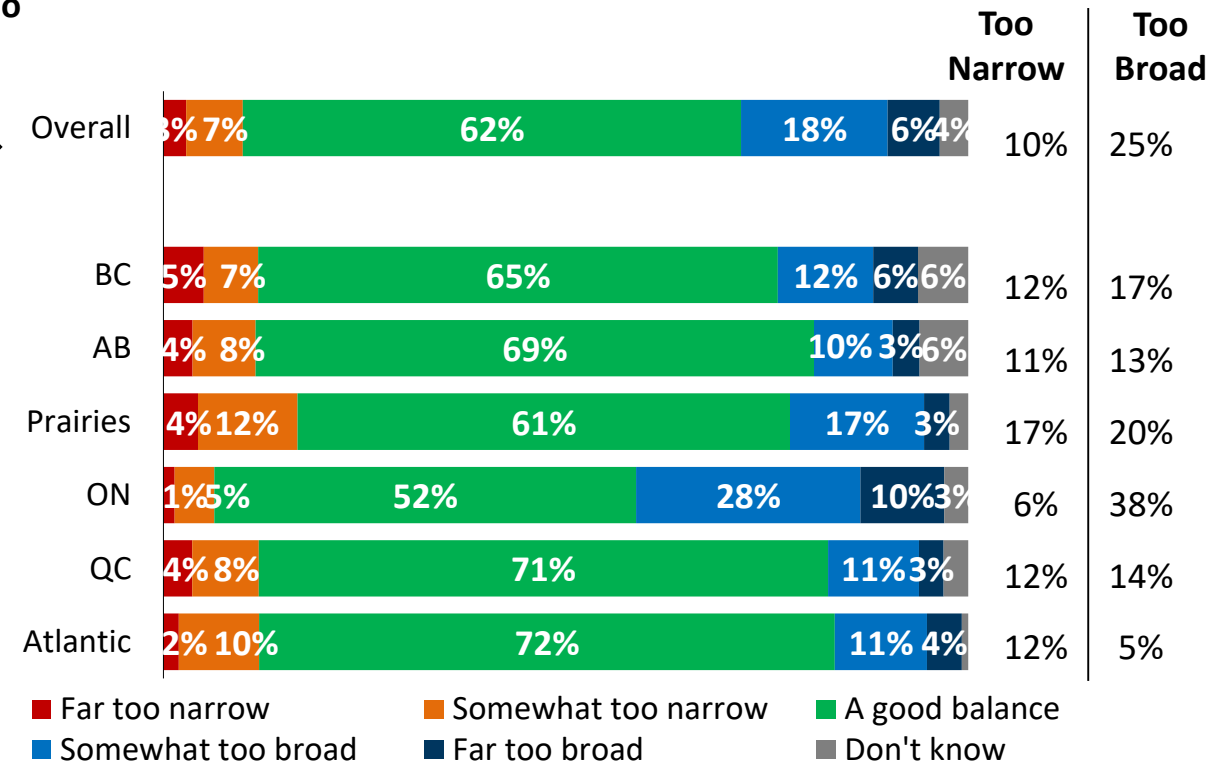
[asked of all respondents; n=1,500]



Among those who have read, seen, or heard

Q Based on what you have read, seen, or heard, would you say the list of essential services in your province is too narrow, too broad, or does it strike a good balance?

[asked of all respondents who have read, seen or heard about list of essential services ; n=1,175]



Appendix: Methodology & Questionnaire

Survey Methodology

These are the results of an online survey conducted between March 31st and April 2nd, 2020.

Method: This online survey was conducted using INNOVATIVE's Canada 20/20 national research panel with additional respondents from Lucid, a leading provider of online sample. Each survey is administered to a series of randomly selected samples from the panel and weighted to ensure that the overall sample's composition reflects that of the actual Canadian population according to Census data to provide results that are intended to approximate a probability sample. This survey includes oversamples of BC and Alberta to take a deeper look at these provinces.

Sample Size: n=2,059 general population, 18 years or older. The results are weighted to n=1,500 based on Census data from Statistics Canada.

Field Dates: March 31st to April 2nd, 2020.

Weighting: Results for Canada are weighted by age, gender, and region to ensure that the overall sample's composition reflects that of the actual population according to Census data; in order to provide results that are intended to approximate a probability sample. Weighted and unweighted frequencies are reported in the table.

Margin of Error: This is a representative sample. However, since the online survey was not a random probability based sample, a margin of error cannot be calculated. Statements about margins of sampling error or population estimates do not apply to most online panels.

Note: Graphs may not always total 100% due to rounding values rather than any error in data. Sums are added before rounding numbers.

Results are drawn from a larger omnibus survey containing multiple topics. This release focuses on the COVID-19 pandemic and the relevant section of the questionnaire is provided as an appendix.

	Unweighted (n)	Unweighted (%)	Weighted (n)	Weighted (%)
Males 18-34	217	10.5%	206	13.8%
Males 35-54	295	14.3%	251	16.7%
Males 55+	579	28.1%	272	18.1%
Females 18-34	254	12.3%	204	13.6%
Females 35-54	285	13.8%	260	17.4%
Females 55+	429	20.8%	307	20.4%
Region				
BC	365	17.7%	205	13.7%
Alberta	304	14.8%	170	11.3%
Prairies	127	6.2%	100	6.7%
Ontario	694	33.7%	573	38.2%
Quebec	423	20.5%	350	23.3%
Atlantic	146	7.1%	102	6.8%

COVID-19 Questionnaire

1. Over the past 7 days, how often have you done each of the following?

1a. Made a trip to a grocery store or a drug store

1b. Made a trip to a store other than a grocery store or a drug store

5 times or more

4 times

3 times

Twice

Once

Never

Don't know

2. Over the past 7 days, how often have you done each of the following?

2a. Visited a relative or friend in their home

2b. Hosted a relative or friend in my own home

2c. Met up with a relative or friend outdoors

2d. Gathered with a small group inside a home

2e. Met up with a small group outdoors

2f. Attended a large gathering of about 50 people or more

5 times or more

4 times

3 times

Twice

Once

Never

Don't know

3. How closely have you been following news about COVID-19 which is also known as the novel coronavirus?

Very closely

Somewhat closely

Not very closely

Not at all

Don't know

4. How concerned are you personally about each of the following?

4a. That you yourself will contract COVID-19.

4b. That a vulnerable friend or a relative will contract COVID-19.

Very concerned

Somewhat concerned

Not very concerned

Not at all concerned

Don't know

5. How much have you changed your day-to-day behaviour in order to reduce the chance you will get COVID-19 or pass it to others?

Not at all

Very little

Quite a bit

A great deal

Don't know

COVID-19 Questionnaire cont.

6. Have you or someone in your household travelled outside of Canada in the last 14 days?

- Yes – I have
- Yes – Someone in my household
- No
- Don't know

7. Are you currently in self-isolation or self-quarantine at home as part of the effort to reduce the spread of COVID-19?

- Yes
- No
- Don't know

8. In the past few weeks, how often have you discussed COVID-19 with your family or friends?

- Not at all
- Once or twice
- A few times
- Many times
- Don't know

9. Do you agree or disagree with each of the following statements?

- 9a. There really isn't very much people can do to avoid getting COVID-19.**
- 9b. Social distancing is less important for me because I'm not in a high-risk group for COVID-19**
- 9c. I am worried that unless I am careful, I could easily transmit COVID-19 to a vulnerable friend or relative**

- Strongly agree
- Somewhat agree
- Neither agree nor disagree
- Somewhat disagree
- Strongly disagree

10. Would you say that in response to the COVID-19 outbreak so far governments have done too much, too little, or the right amount?

- Far too much
- Somewhat too much
- The right amount
- Somewhat too little
- Far too little
- Don't know

11. Do you approve or disapprove of the way the [PROV] Government has handled the outbreak of COVID-19?

- Strongly approve
- Somewhat approve
- Neither approve nor disapprove
- Somewhat disapprove
- Strongly disapprove
- Don't know

COVID-19 Questionnaire cont.

12. Now thinking about the federal government, do you approve or disapprove of the way the federal government has handled the outbreak of COVID-19?

Strongly approve

Somewhat approve

Neither approve nor disapprove

Somewhat disapprove

Strongly disapprove

Don't know



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Building Understanding.