

Shifting Gears in the Fight Against COVID-19

Public Opinion Research
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Field Dates: May 15, 2020 to May 19, 2020



Shifting Gears in the Fight Against COVID-19

As the new case counts begin to decline in Canada, the immediate challenge facing the federal government will shift from health to economic recovery.

Given this, INNOVATIVE is releasing results that shed light on three core questions:

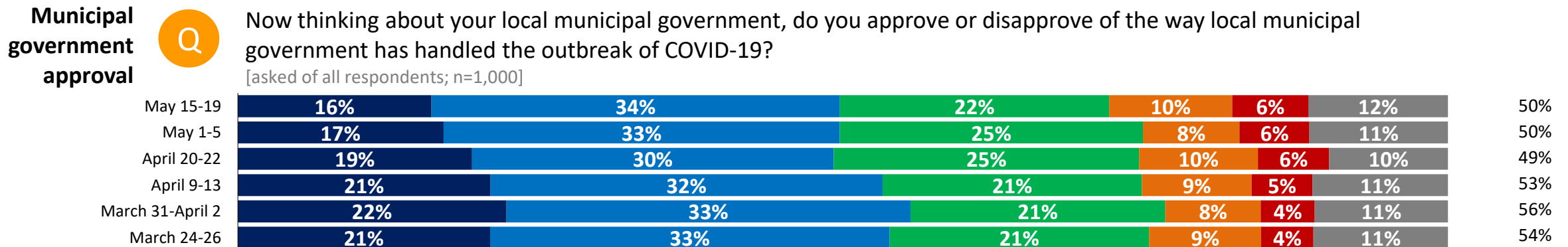
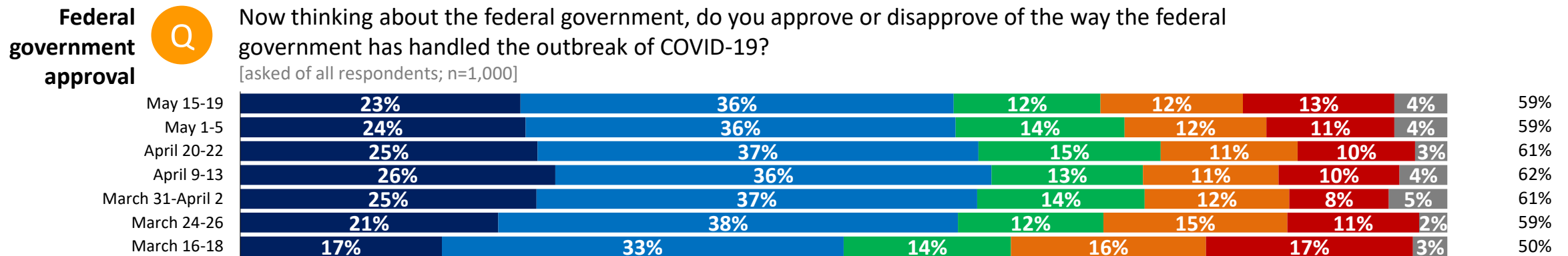
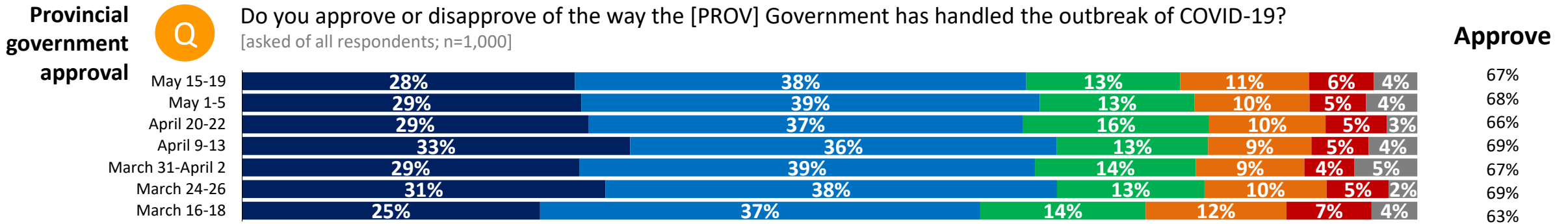
- I. Where do things stand – for governments and in terms of personal finances?*
- II. Compared to before the COVID-19 outbreak, have views on economic policy changed?*
- III. So where does that leave government?*

Results of this release come from INNOVATIVE's latest survey conducted between May 15th and May 19th with a weighted sample size of 1,000 Canadian residents. Detailed methodology is provided in the appendix.

1. Where do things stand – for governments?

Canadians are rallying around their governments. Approval of government's handling of the outbreak has been high for most Canadians since the early days of the outbreak and has remained that way as restrictions begin to ease.

Government Approval Tracking: Over half approve of provincial, federal,⁴ and municipal handling of COVID-19 since the early days of the outbreak



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

Provincial Government Approval: Approval for provincial handling is highest in BC, Ontario, and Atlantic Canada and lowest in Alberta

Provincial government approval

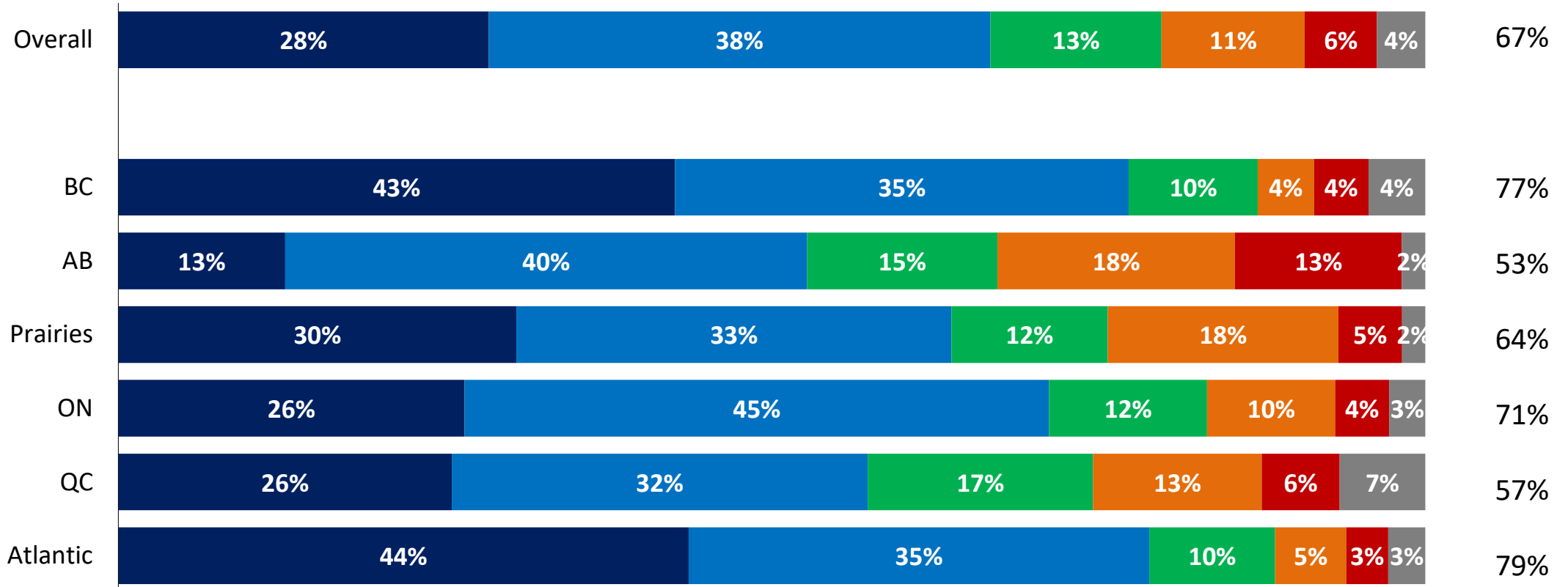


Do you approve or disapprove of the way the [PROV] Government has handled the outbreak of COVID-19?

BY Region

[asked of all respondents; n=1,000]

Approve



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



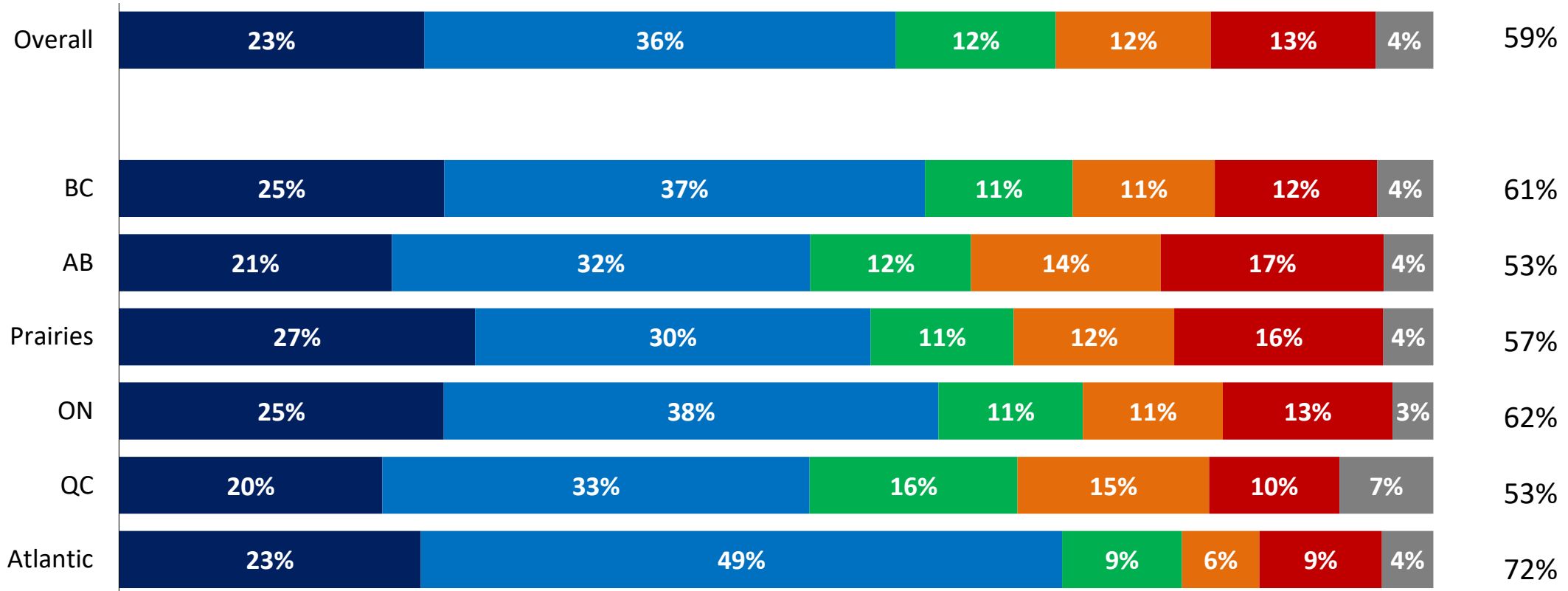
Federal Government Approval: Approval of the federal government's response is highest in BC, Ontario, and Atlantic Canada

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=1,000]

Approve



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



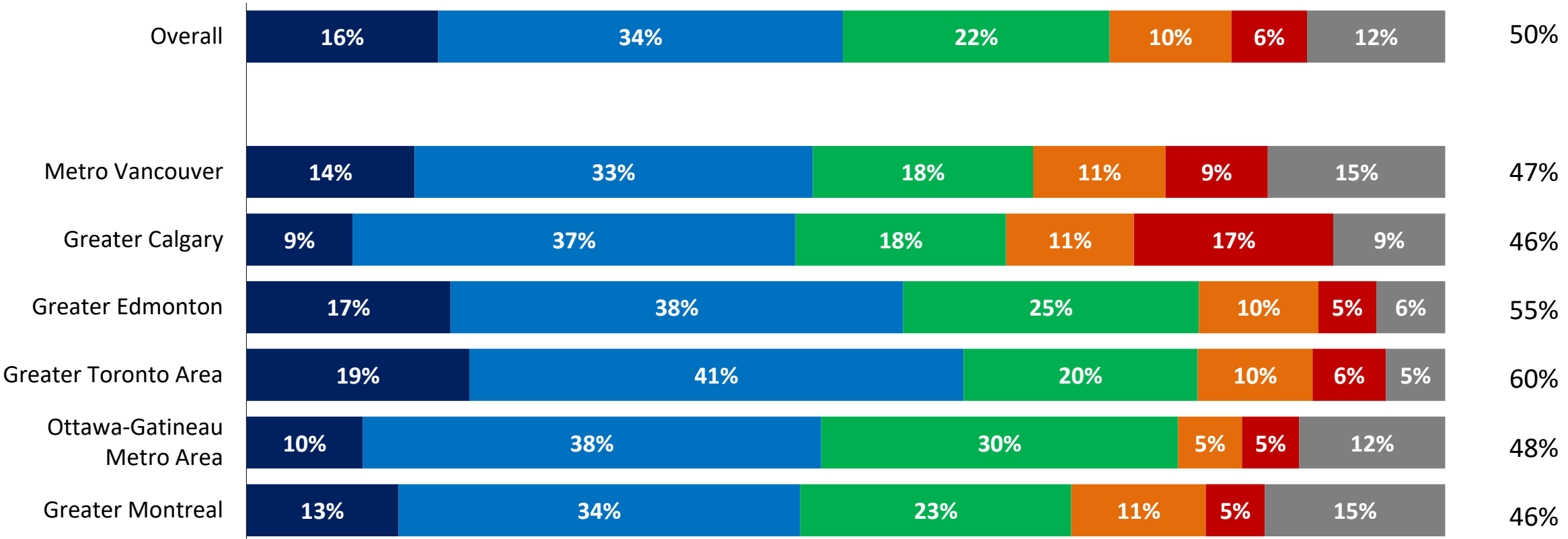
Municipal Government Approval: Approval for municipal handling is highest in the GTA (60%) and Edmonton (55%)

Municipal government approval



Now thinking about your local municipal government, do you approve or disapprove of the way local municipal government has handled the outbreak of COVID-19? BY Large Metropolitan Area
[asked of all respondents; n=1,000]

Approve



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

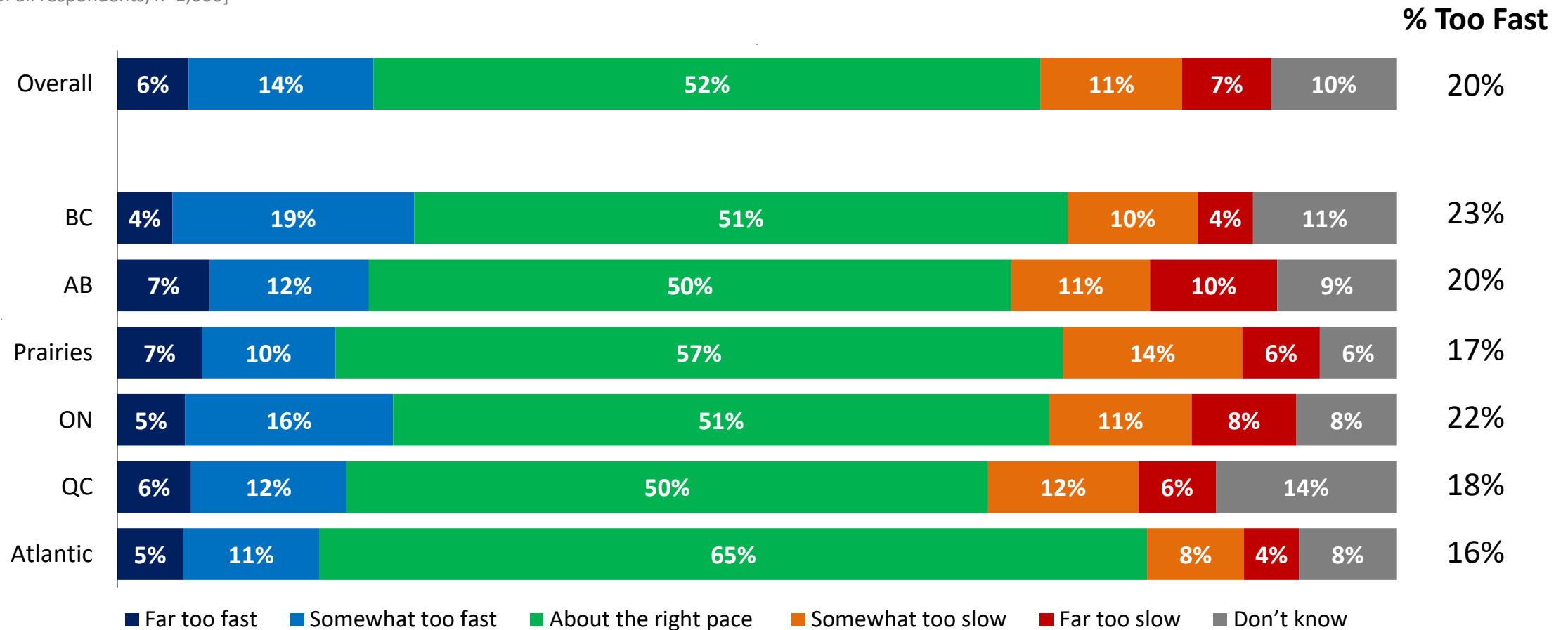


Easing Restrictions | Federal: The majority across all provinces believe the federal government is at the right pace on easing restrictions



Now, thinking about the steps the **federal** government has taken so far to ease restrictions on businesses and social contacts, do you think the federal government has gone too fast, has gone too slow, or has gone about the right pace?

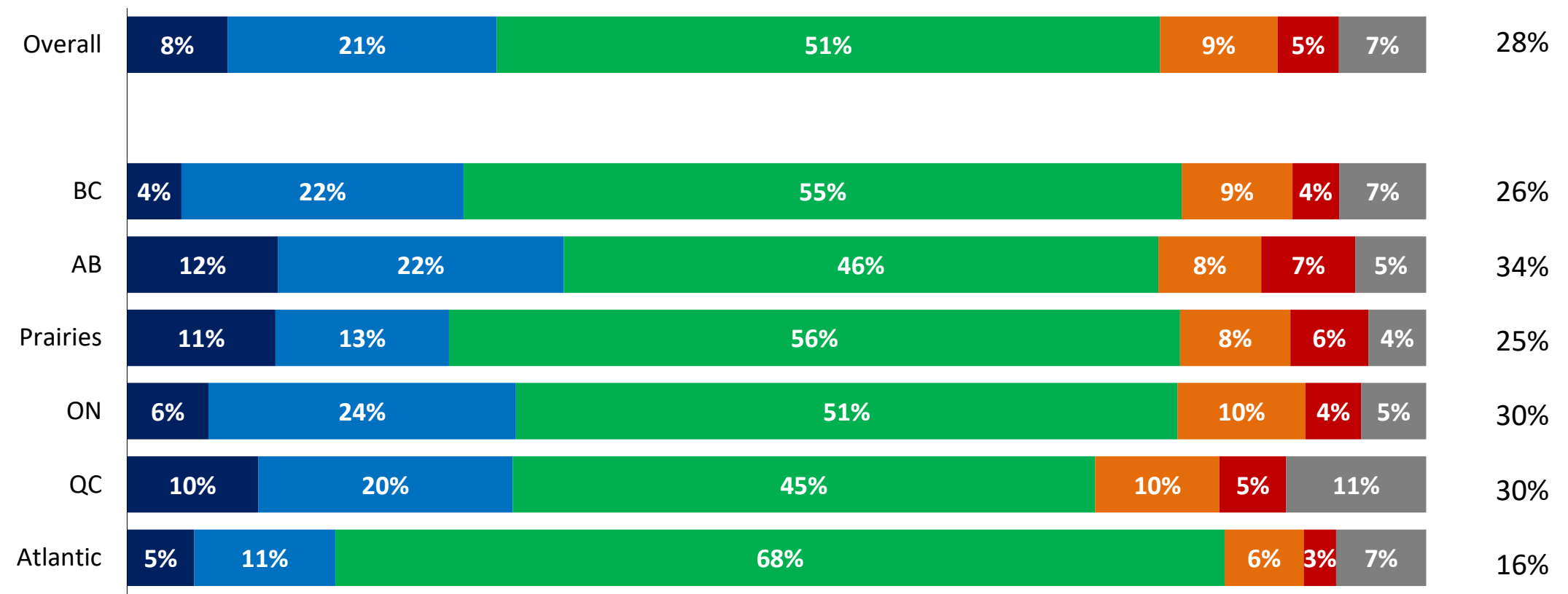
[asked of all respondents; n=1,000]



Easing Restrictions | Provincial: Most Canadians feel their provincial gov'ts have found the right balance when it comes to easing restrictions

Q Now, thinking about the steps the **provincial** government in [PROV] has taken so far to ease restrictions on businesses and social contacts, do you think the provincial government has gone too fast, has gone too slow, or has gone about the right pace?
 [asked of all respondents; n=1,000]

% Too Fast



■ Far too fast
 ■ Somewhat too fast
 ■ About the right pace
 ■ Somewhat too slow
 ■ Far too slow
 ■ Don't know



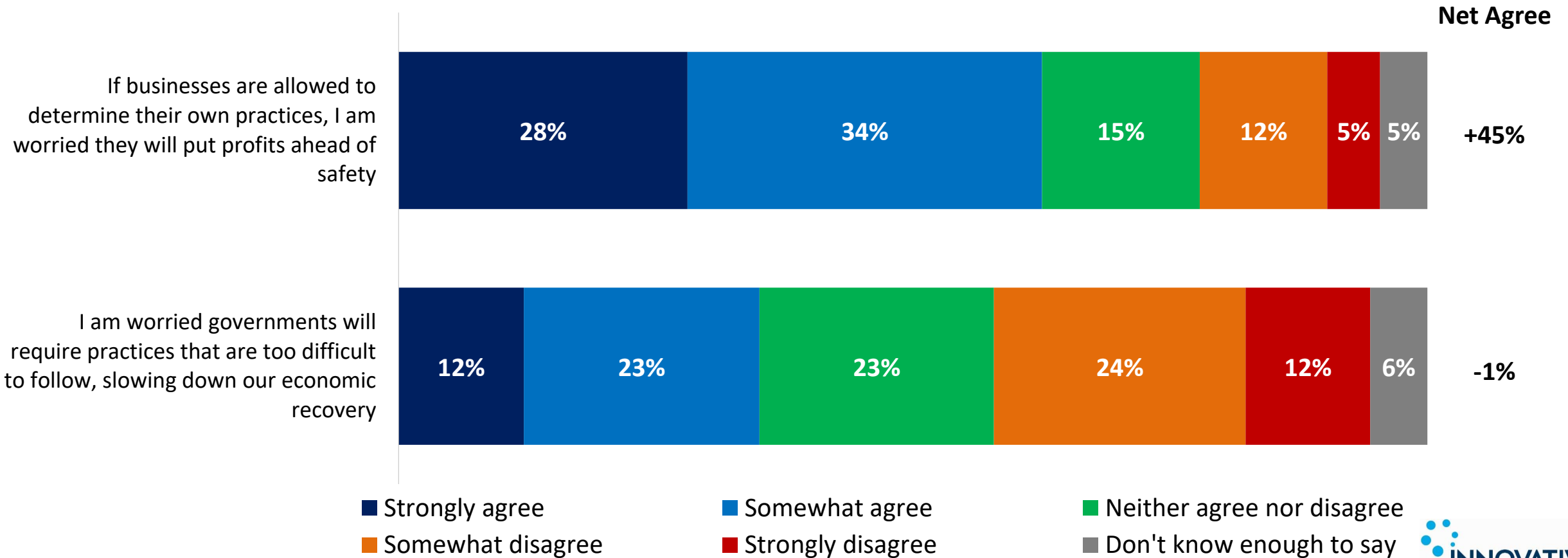
Health and Safety Practices: Over 3-in-5 (63%) agree they're worried about businesses putting profits ahead of safety



Governments have said that many restrictions on businesses will need to stay in place until there is a vaccine. However, in the meantime, most businesses will be able to operate with new health and safety practices in place.

When it comes to deciding on what health and safety practices businesses will need to follow, do you agree or disagree with each of the following statements?

[asked of all respondents; n=1,000]



*1. Where do things stand –
in terms of personal finance?*

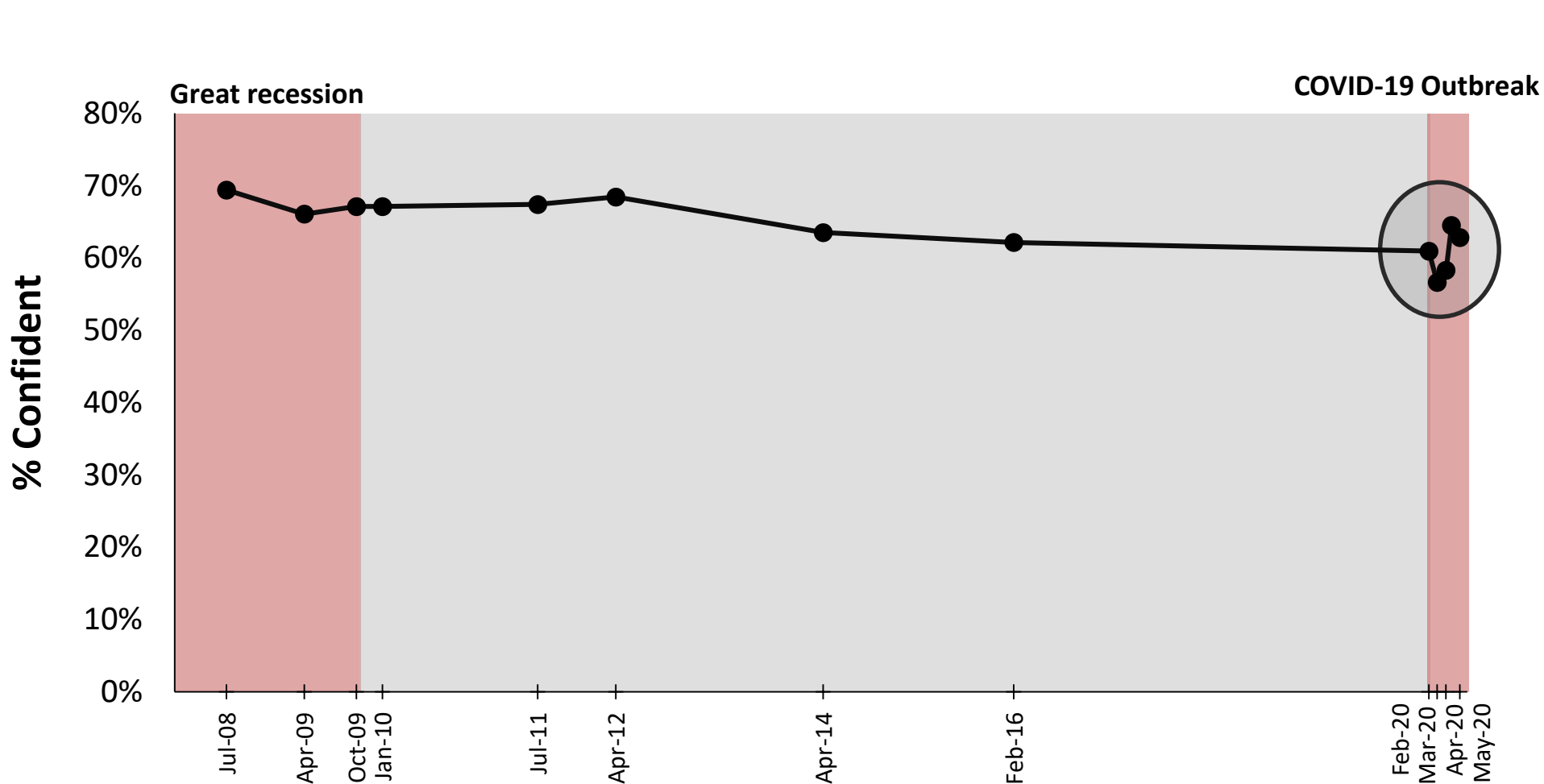
Canadians' sense of personal financial confidence has bounced back after an initial dip at the start of the outbreak. As Canadians look ahead, longer term economic worries are starting to grow.

Household financial confidence only took a small dip from its long-term trend at the outset of the pandemic and has since recovered

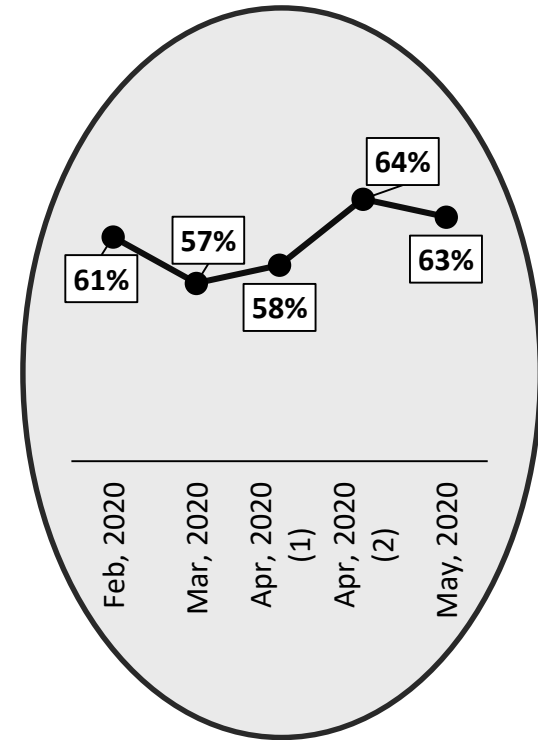


Generally speaking, how confident and secure do you feel about your household's current financial situation?

[all respondents, n=1,000]



Highlight on recent tracking



Notes: Two data points are shown for April 2020 (both waves of April tracking)

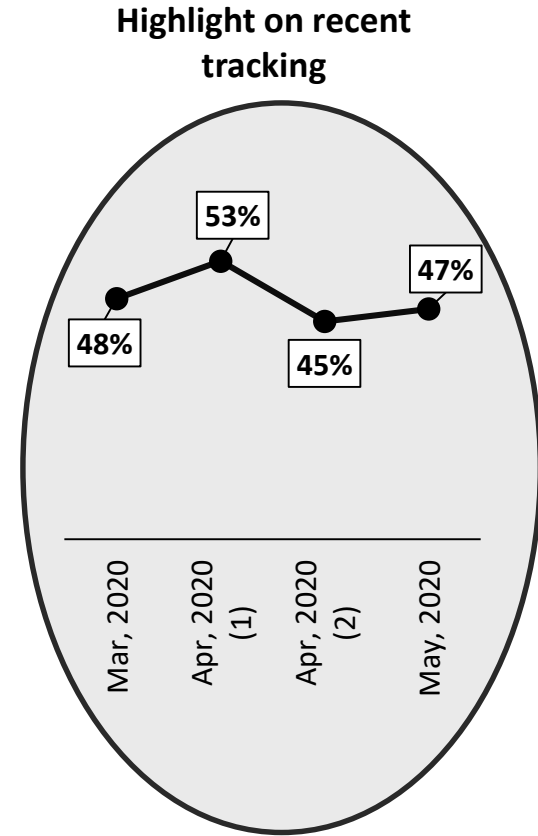
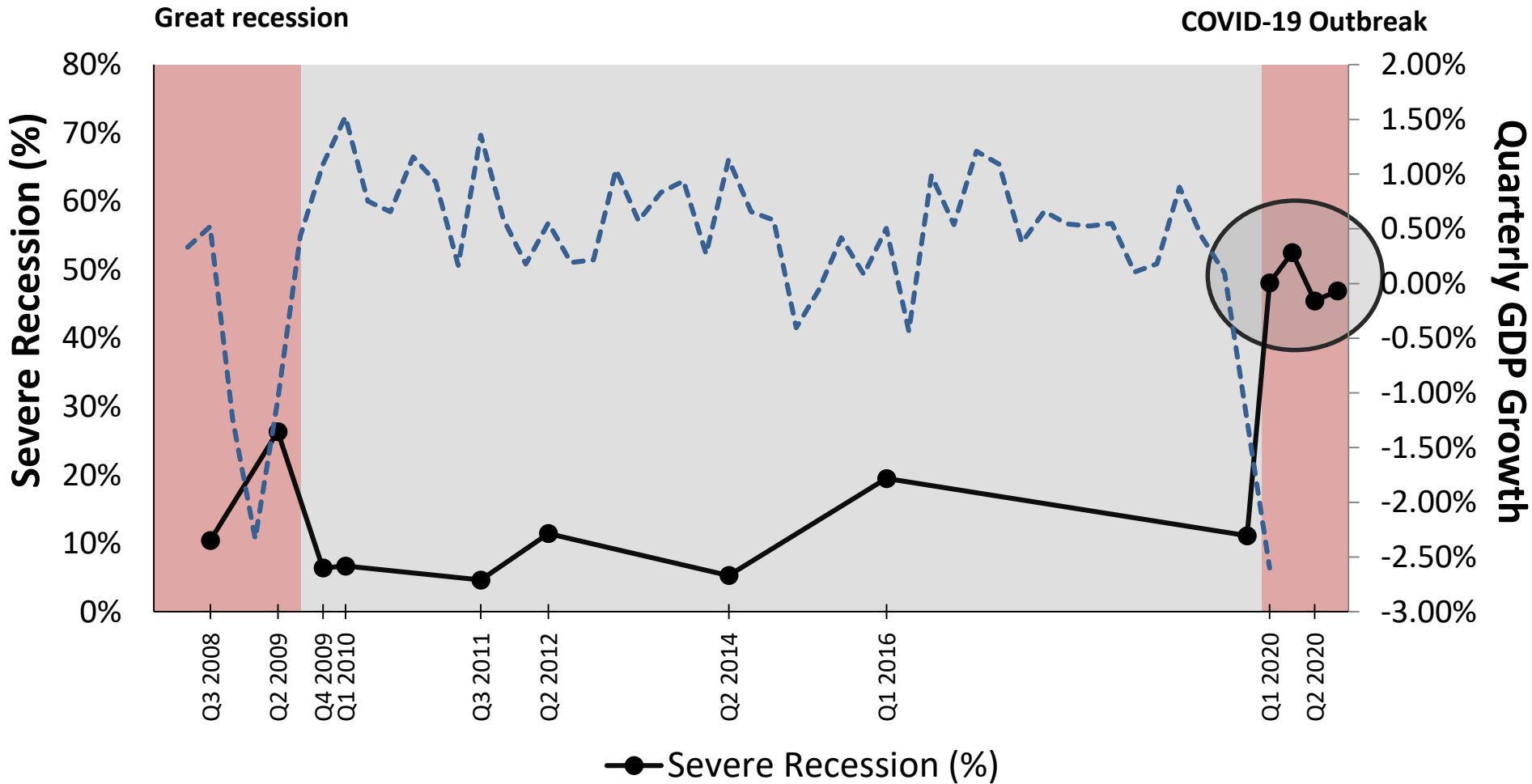
Concerns about a severe recession jumped at the outset of the COVID-19 outbreak to a level nearly twice what we saw in 2009



Do you feel the Canadian economy is moving into a period of recession or into a period of growth?

[% who say "Severe Recession"; compared against quarterly GDP growth]

[all respondents, n=1,000 for latest wave]



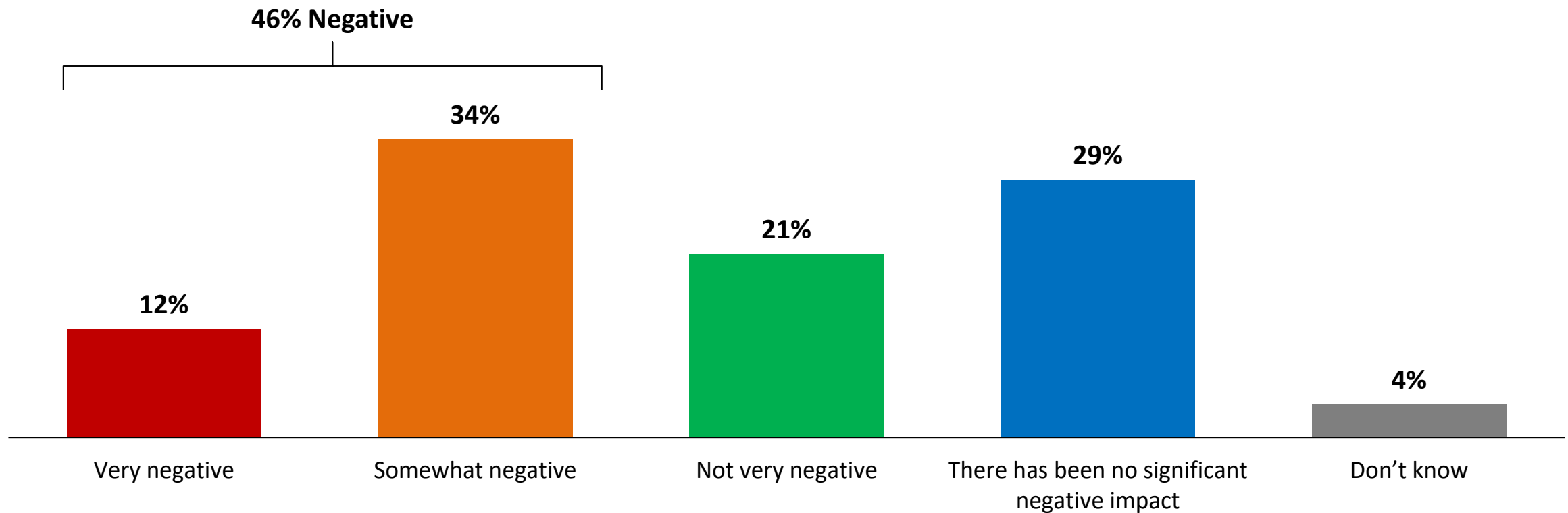
Notes: Months are assigned into their respective quarter for comparison to GDP, multiple data points are shown for Q1 2020 (February and March) and Q2 2020 (April wave 1, April wave 2, and May) GDP estimates are seasonally adjusted. Source: Statistics Canada Table 36-10-0449-01. Q2 2020 data is from the Statistics Canada 'flash estimate' released April 15, 2020.

Financial Impact: Close to half (46%) say they have experienced a negative financial impact



How big of a negative financial impact has the COVID-19 outbreak had on your household finances?

[asked of all respondents; n=1,000]

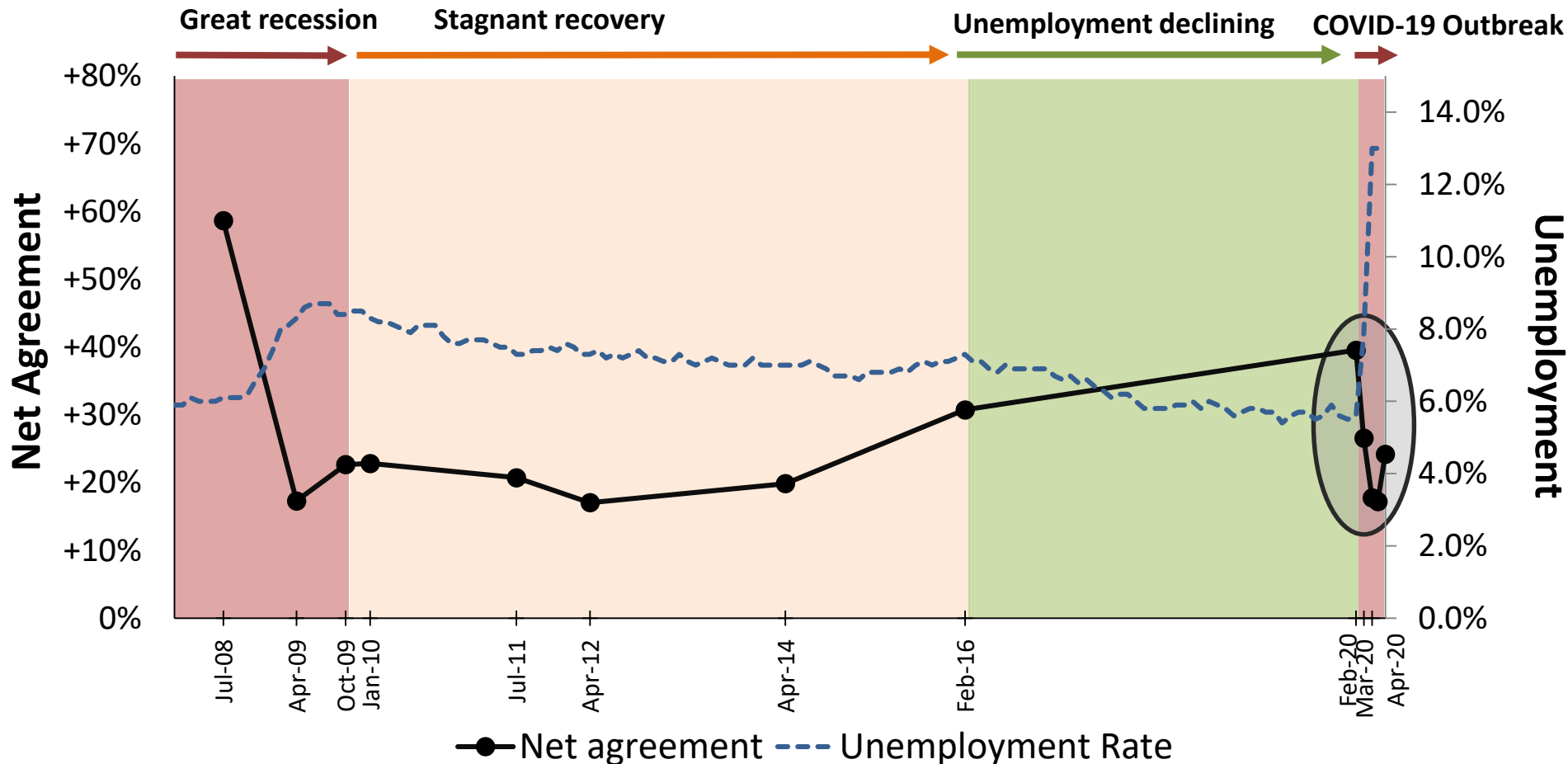


After a long recovery following the 2008/9 Recession, confidence in finding a new job dropped drastically in the wake of COVID-19

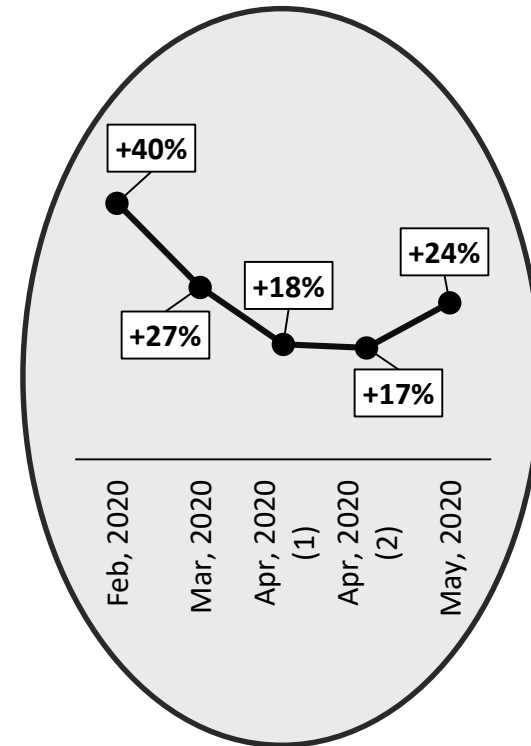


Net agreement: I feel confident that I could get another job somewhere else if I wanted to
 [results shown of those who are currently employed; n=447 for the current wave]

Among those who are currently employed



Highlight on recent tracking



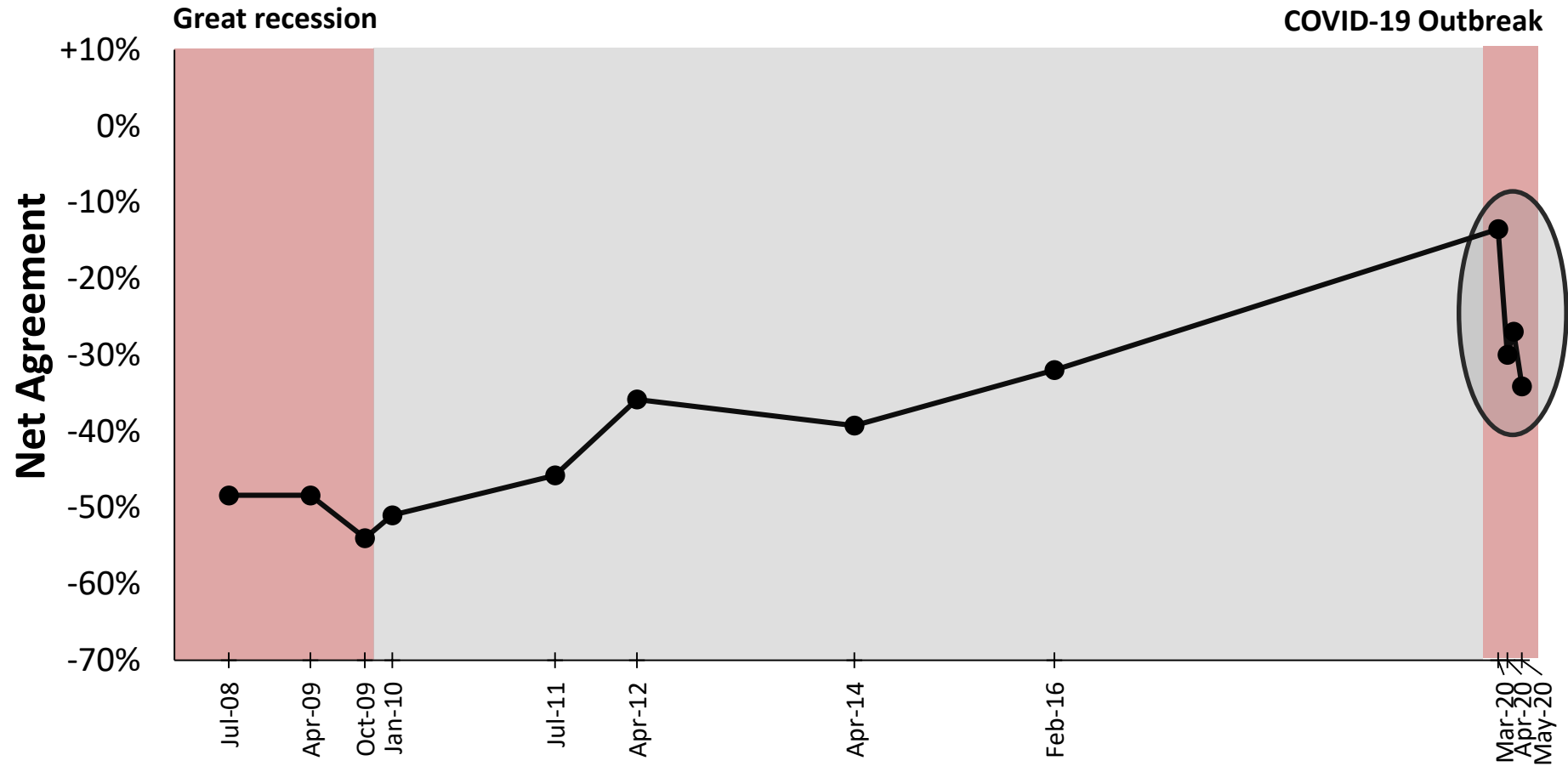
Notes: Two data points are shown for Q2 2020 (Both waves of tracking in April)
 NET AGREEMENT= AGREE (strongly, somewhat) minus DISAGREE (somewhat, strongly), "Neither/DK" not included.
 Unemployment rate is seasonally adjusted. Source: Statistics Canada. Table 14-10-0287-01.

At the outset of the COVID-19 outbreak Canadians' concern about the health of their employer jumped, but has since dropped back down ¹⁶

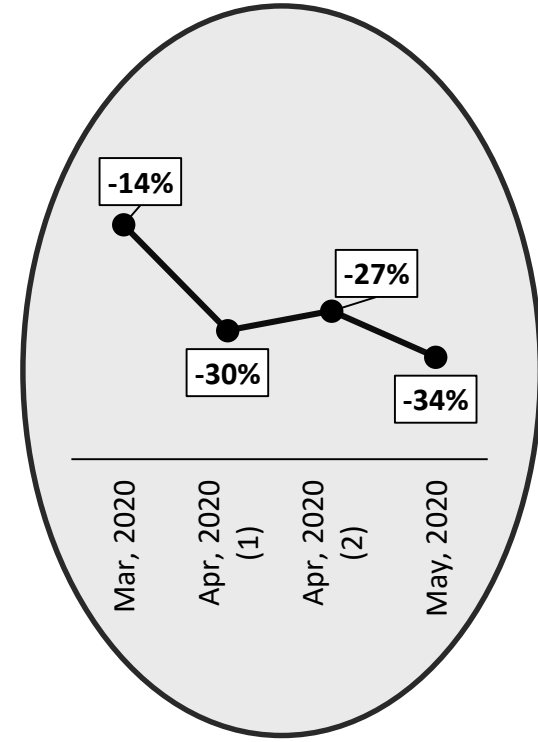


Net agreement: I'm **not** sure the organization I work for is going to survive the downturn in the economy.
 [results shown of those who are currently employed; n=447 for the current wave]

Among those who are currently employed



Highlight on recent tracking



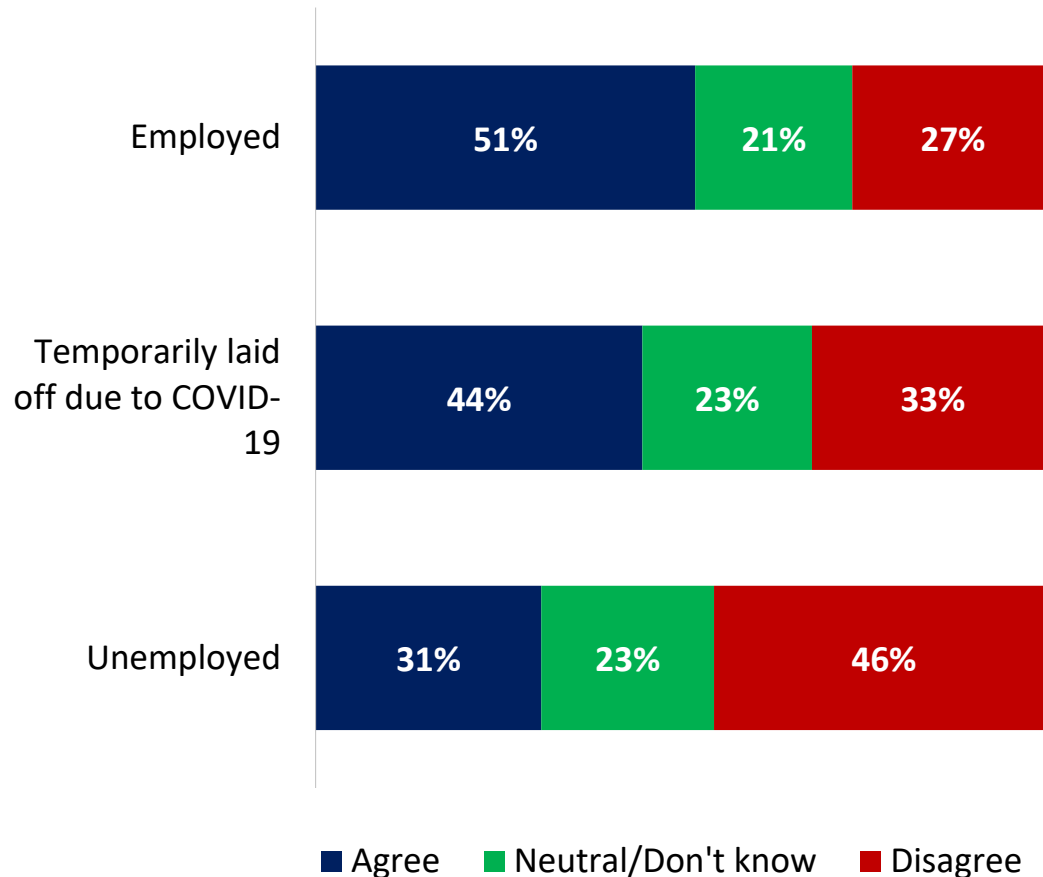
Note: NET AGREEMENT= AGREE (strongly, somewhat) minus DISAGREE (somewhat, strongly), "Neither/DK" not included
 Two data points are shown for April 2020 (both waves of April tracking)

Those who are temporarily laid off due to COVID-19 are less optimistic about the job market and their employer than the employed



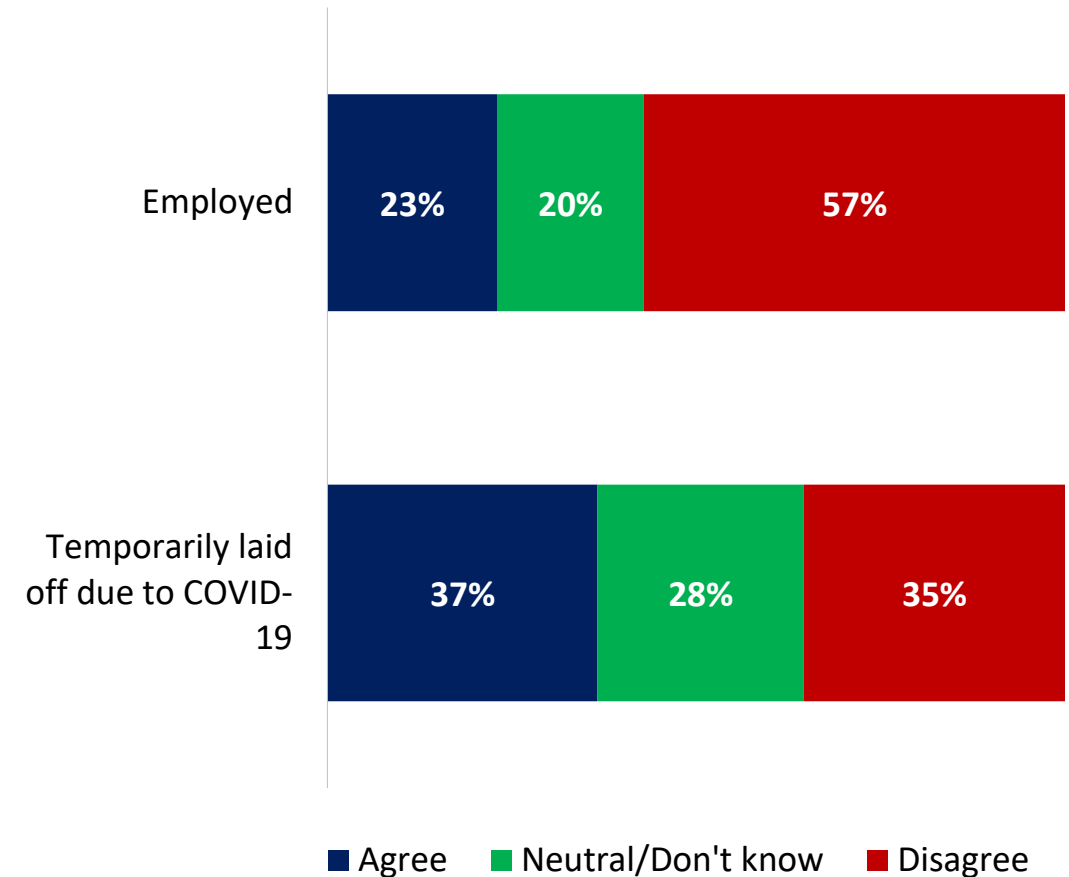
Net agreement: I feel confident that I could get another job somewhere else if I wanted to

[only asked of those who are in the workforce; n=610 for the current wave]



Net agreement: I'm **not** sure the organization I work for is going to survive the downturn in the economy.

[only asked of those who are employed and temporarily laid off; n=530 for the current wave]



II. Compared to before the COVID-19 outbreak, have views on economic policy changed?

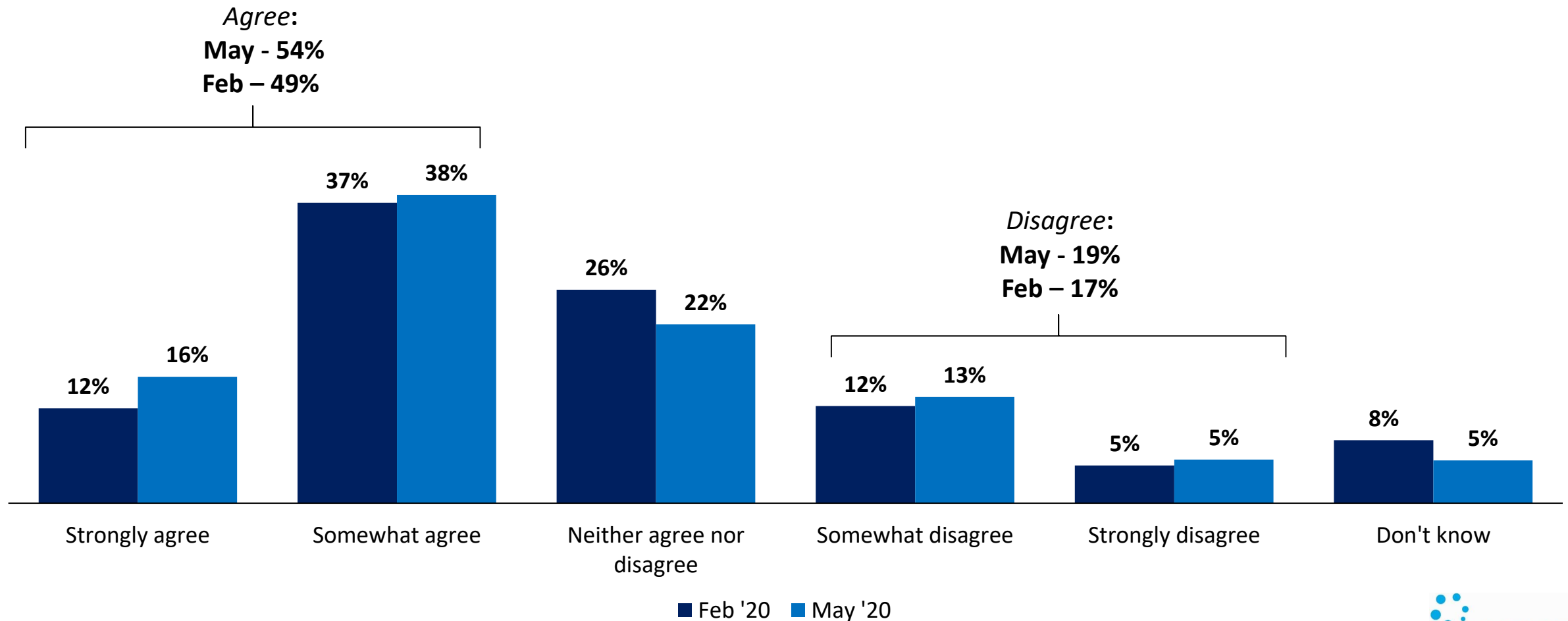
Canadians remain committed to free enterprise and the profit motive as the engine that drives our economy.

Free Enterprise: Majority (54%) feel that free enterprise economic system works well, up 5 points since February



Do you agree or disagree with the following statements about the economy? **On the whole, our free enterprise economic system works pretty well.**

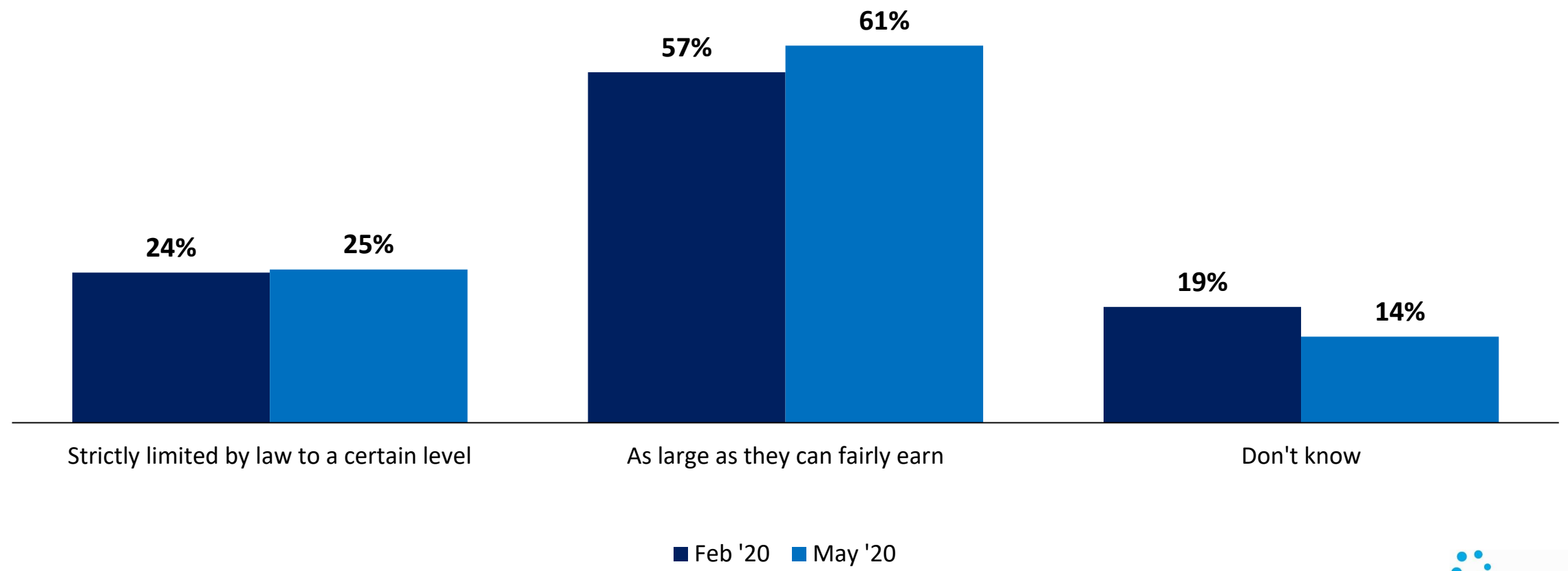
[asked of all respondents; n=1,000]



Profit Size: Majority continue to say profits a company can earn can be as large as they can fairly earn



The profits a company or business can earn should be...
[asked of all respondents; n=1,000]



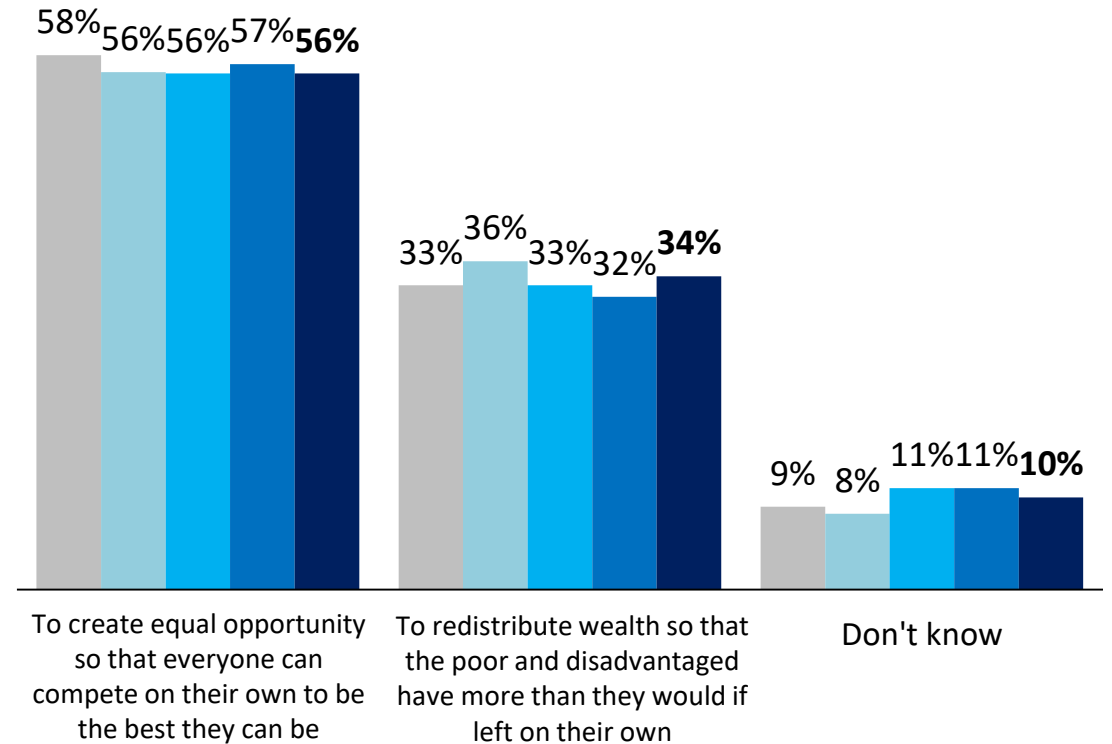
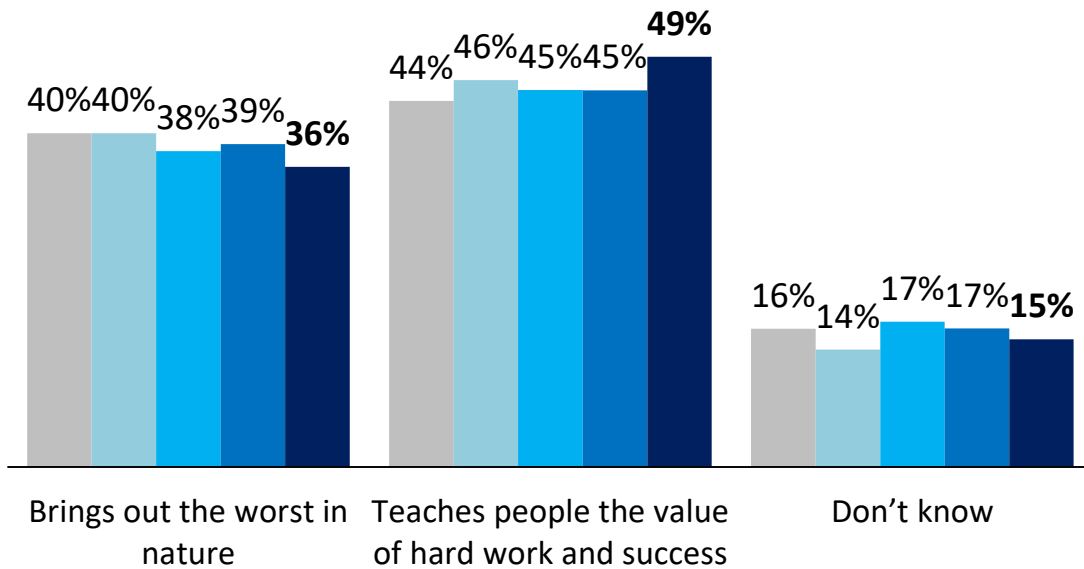
Key Values on equal opportunity vs redistribute wealth and whether profit teaches the value of hard work or bring out the worst are stable



Which one of the following statements comes closest to your view? The profit system ...
[asked of all respondents; n=1,000]



Is the main role of government ...?



March 17-18
 March 24-26
 March 31-April 2
 May 1-5
 May 15-19

March 17-18
 March 24-26
 March 31-April 2
 May 1-5
 May 15-19

II. Compared to before the COVID-19 outbreak, have views on economic policy changed?

Canadians want governments to play a strong role in the economy.

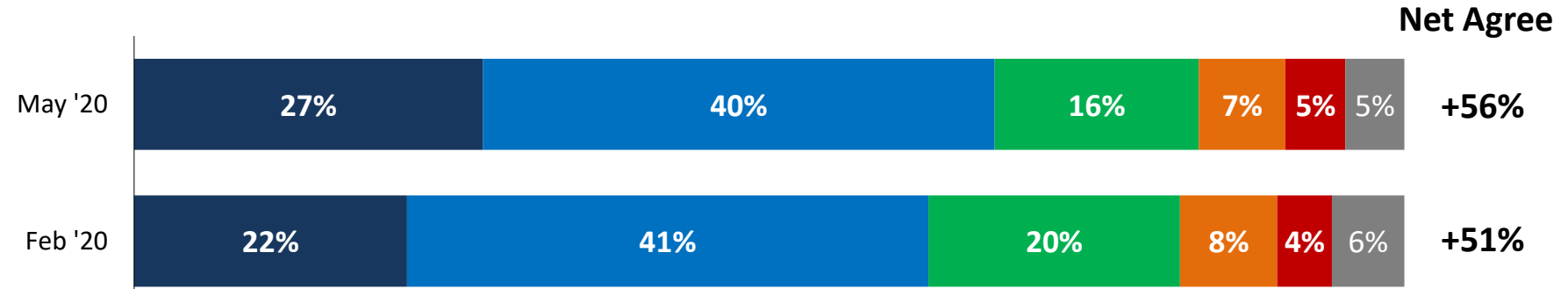
Role of Government: More expect to see a strong central gov't. Also, less now say government economic programs do more harm than good



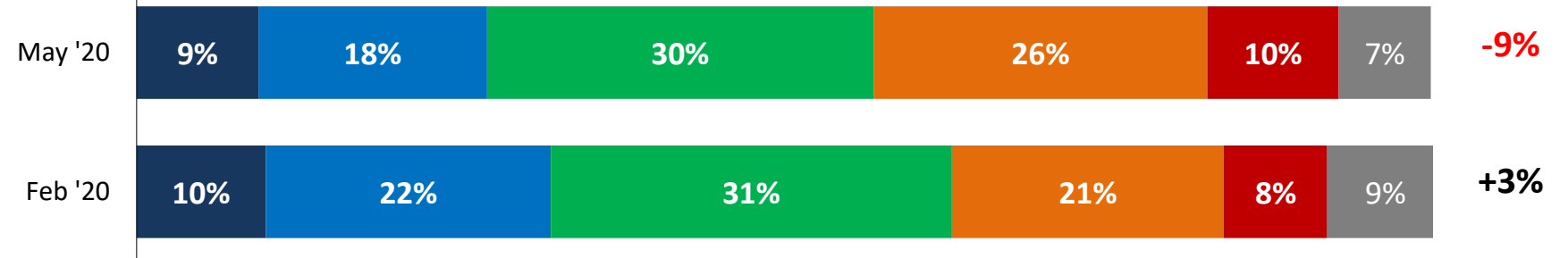
Now let's turn to economic issues and provincial finances. Do you agree or disagree with the following statements about the economy?

[asked of all respondents; n=1,000]

We need a strong central government to handle modern economic problems efficiently



Most government economic programs do more harm than good



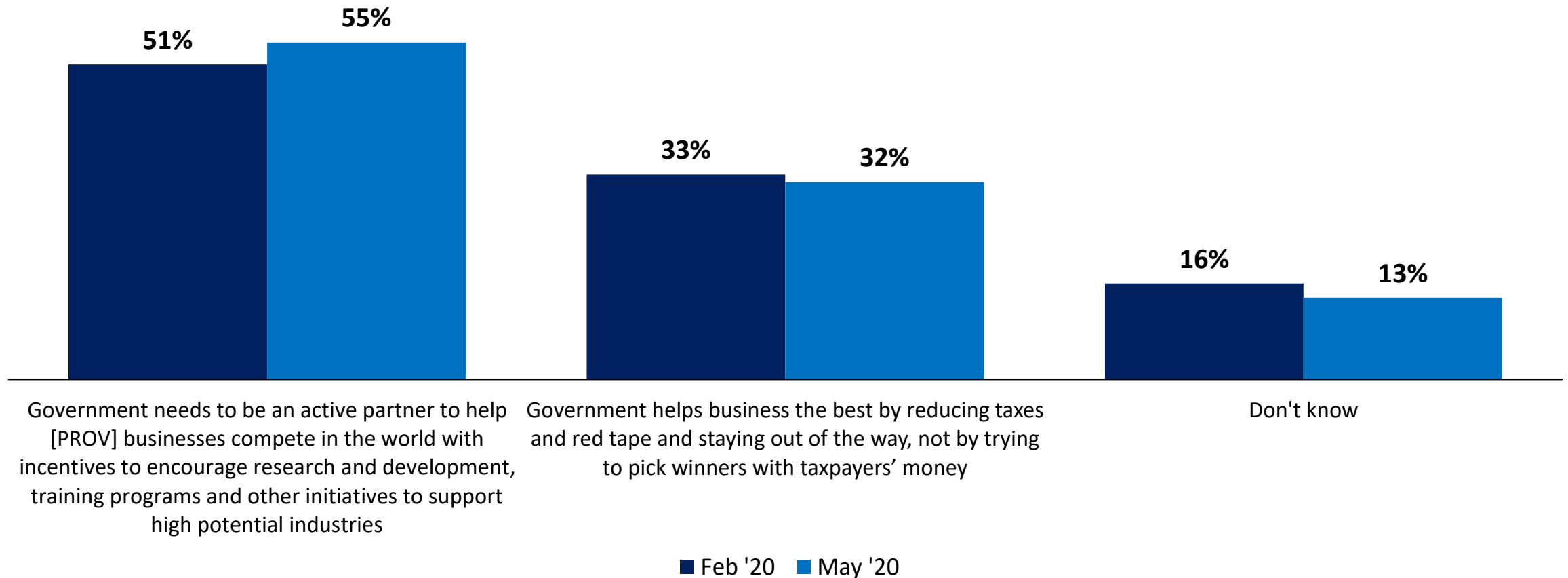
■ Strongly agree
 ■ Somewhat agree
 ■ Neither agree nor disagree
 ■ Somewhat disagree
 ■ Strongly disagree
 ■ Don't know

Role of Provincial Govt: Majority (55%) say provincial gov't should be an active partner to help businesses, up directionally since February



Thinking about the role of the provincial government when it comes to the economy, which statement is closest to your point of view?

[asked of all respondents; n=1,000]



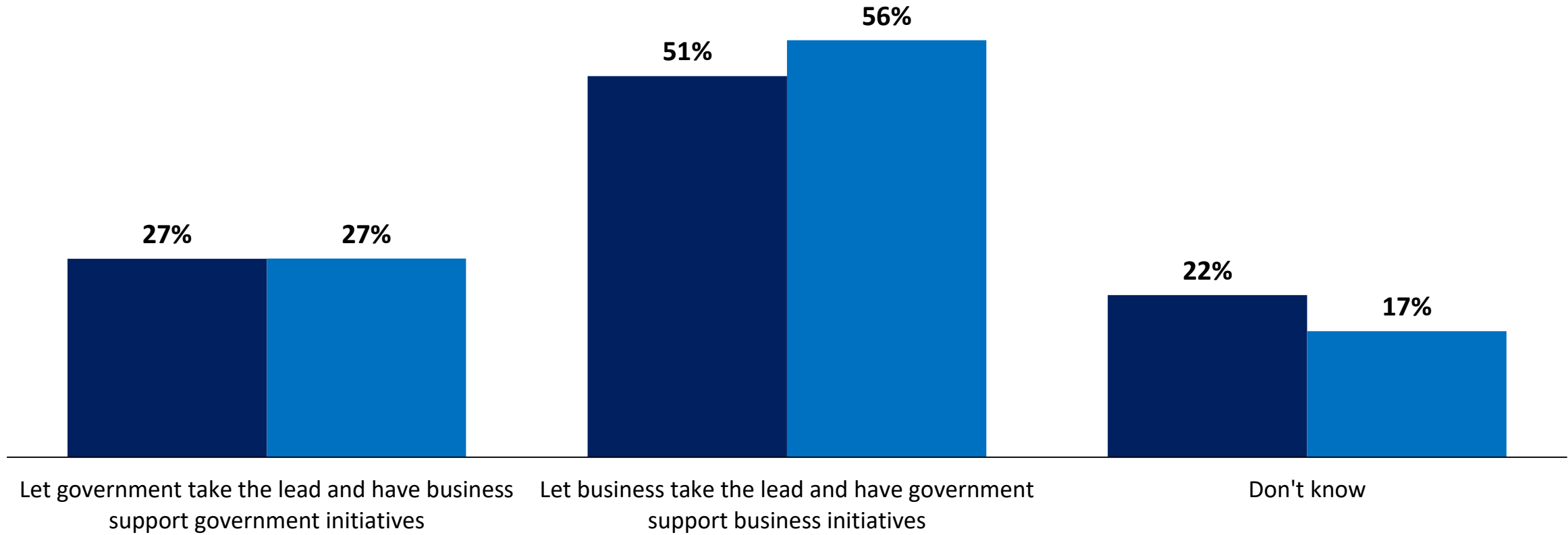
II. Compared to before the COVID-19 outbreak, have views on economic policy changed?

When it comes to generating economic growth, Canadians continue to say business should take the lead. But that doesn't mean they are giving businesses a blank cheque.

Growing the Economy: Majority (56%) say we should let businesses take the lead



When it comes to economic growth, should we...
[asked of all respondents; n=1,000]



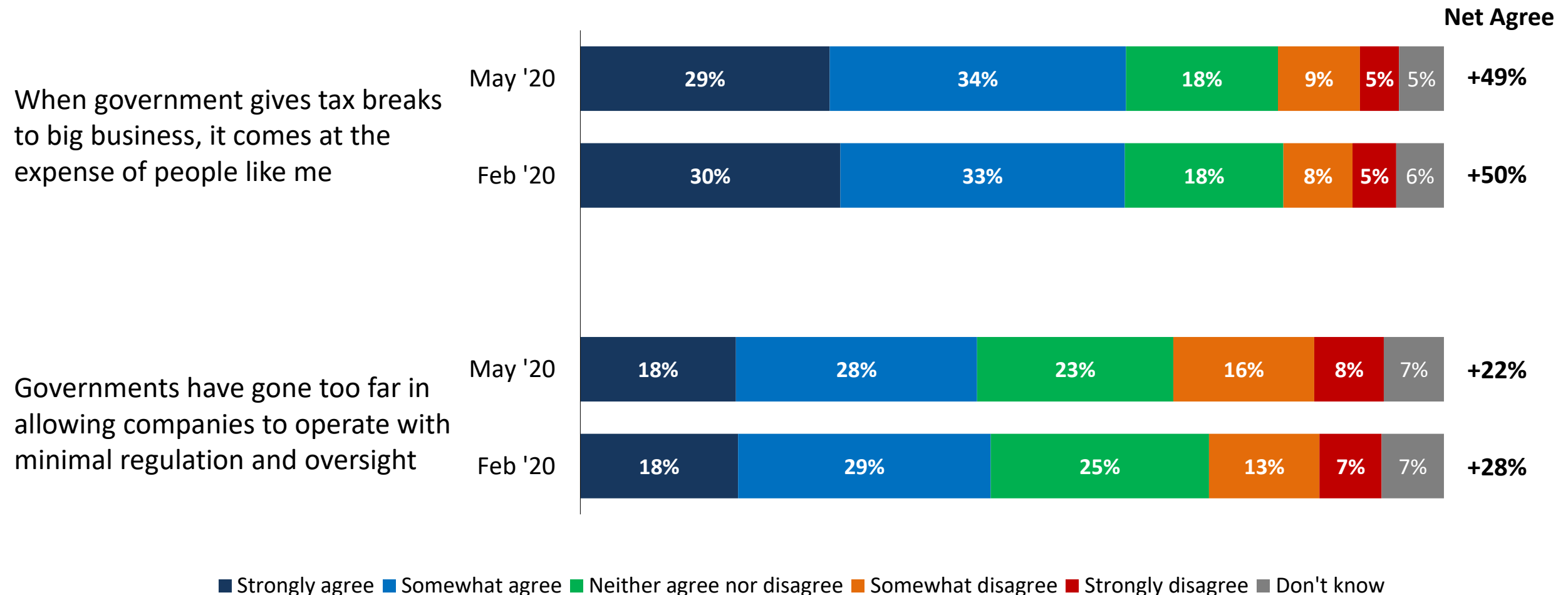
■ Feb '20 ■ May '20

63% agree that tax breaks for big business come at their expense. 46% say gov'ts have gone too far in allowing minimal regulation.



Now let's turn to economic issues and provincial finances. Do you agree or disagree with the following statements about the economy?

[asked of all respondents; n=1,000]

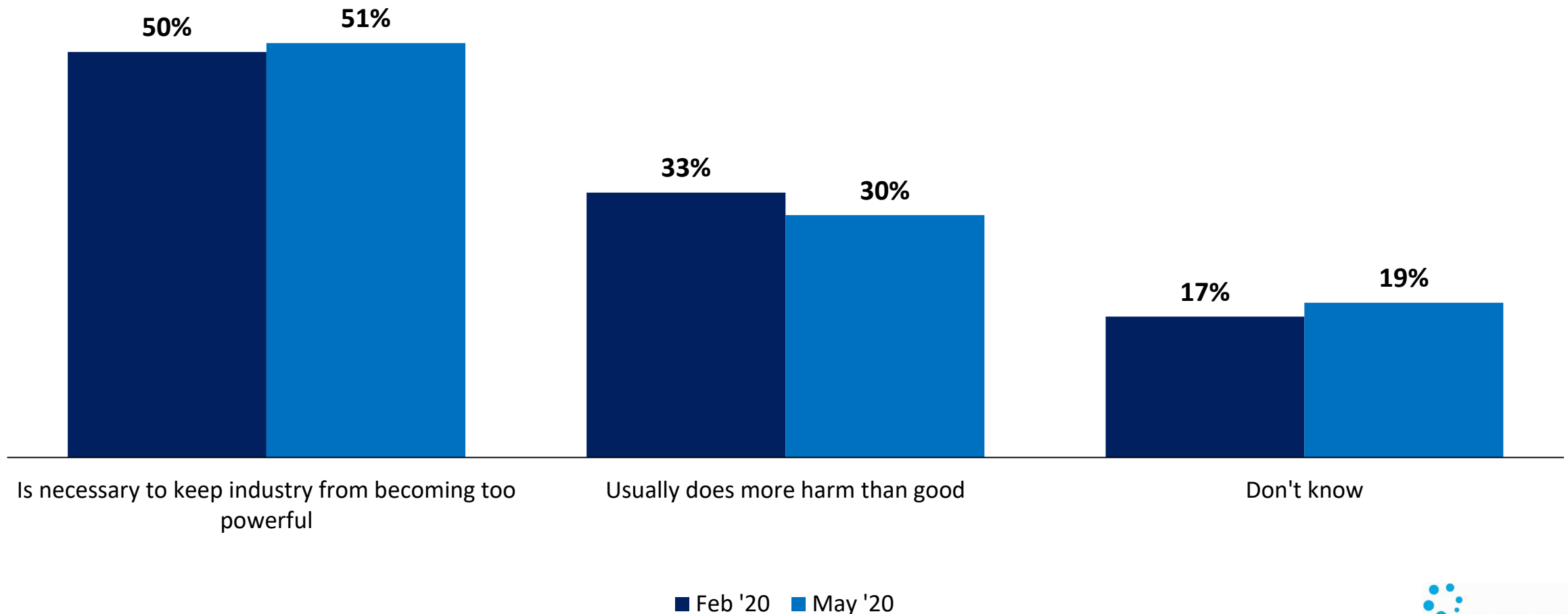


Government Regulation: Half (51%) say government regulation of business is necessary, 3-in-10 (30%) say it does more harm than good



Which of the following statements is closest to your view? Government regulation of business...

[asked of all respondents; n=1,000]



II. Compared to before the COVID-19 outbreak, have views on economic policy changed?

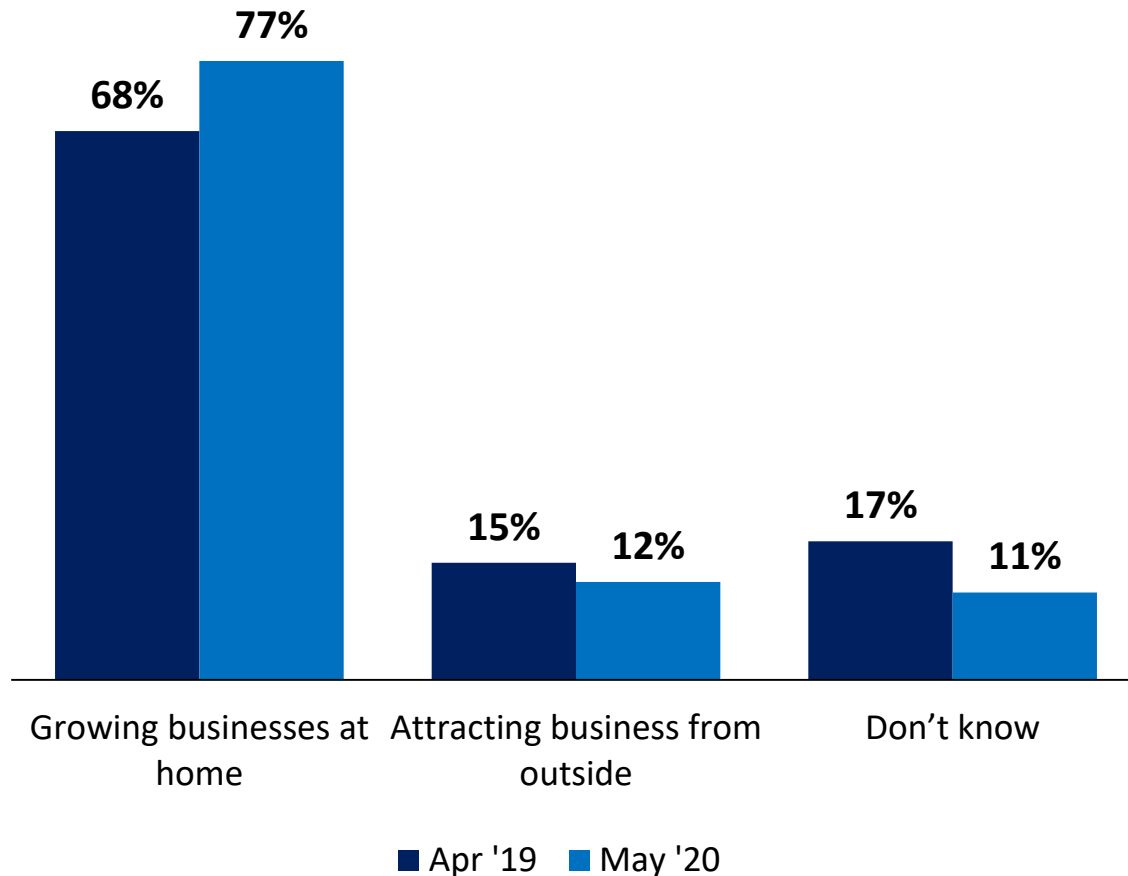
They continue to say the government should give priority to grow our local companies, but don't abandon trade.

Growing Business: A large majority continue to say priority should be given to grow local companies



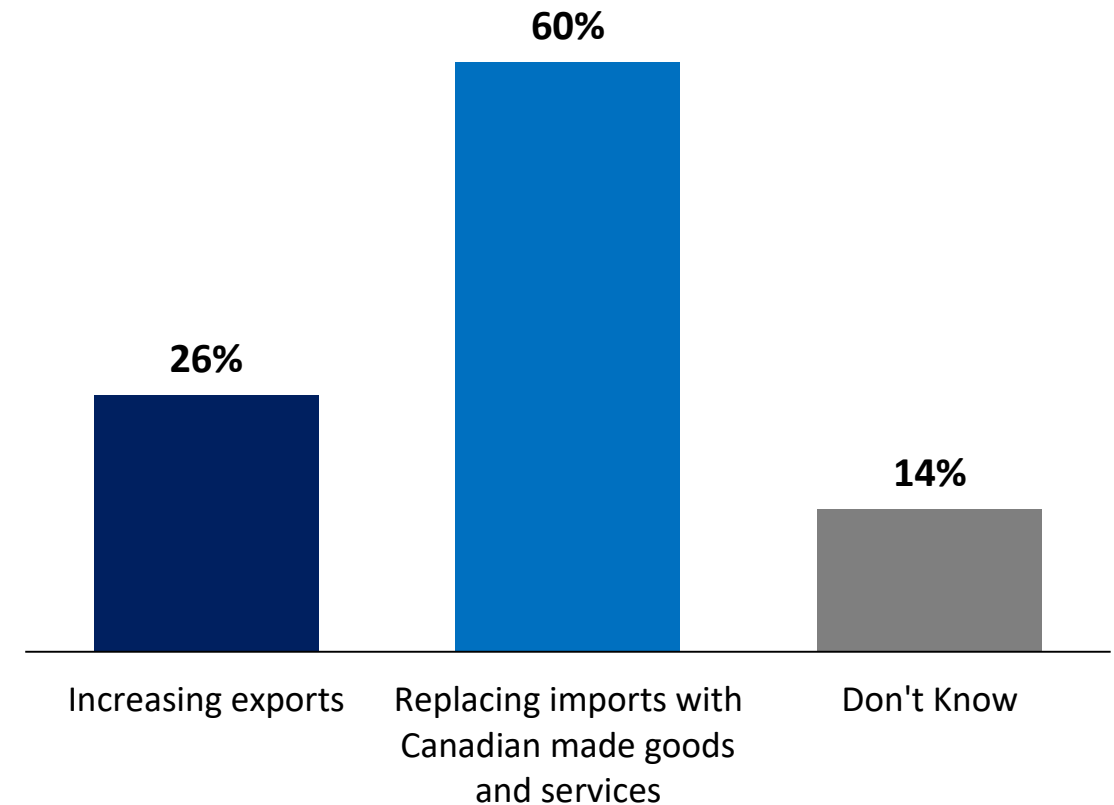
Should the federal government spend more resources growing businesses at home or attracting business from outside of Canada?

[asked of all respondents; n=1,000]



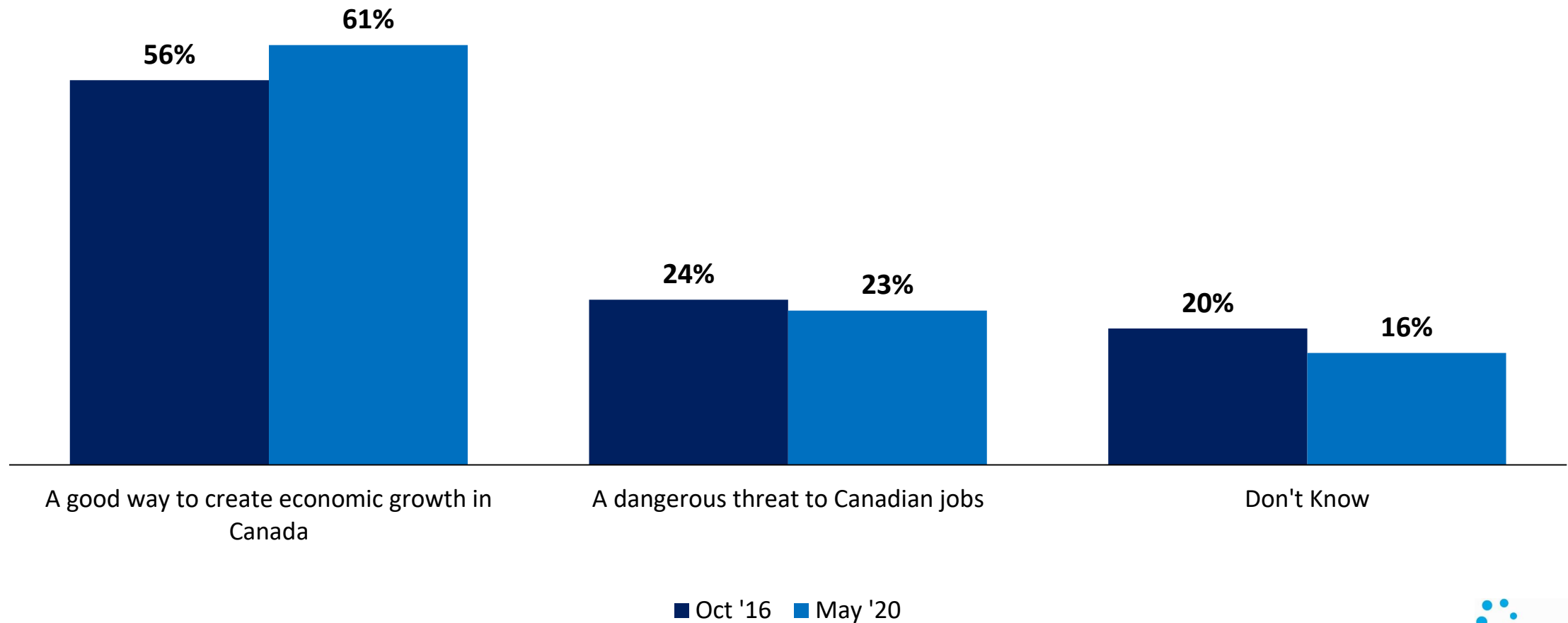
In thinking about an economic recovery from the current downturn, do you think Canada would be better off focusing on increasing exports or reducing imports?

[asked of all respondents; n=1,000]



Free Trade: Despite a strong emphasis on growing local businesses, many continue to say Canada should not abandon trade

Q Which statement is closer to your point of view? Free trade agreements are...
[asked of all respondents; n=1,000]



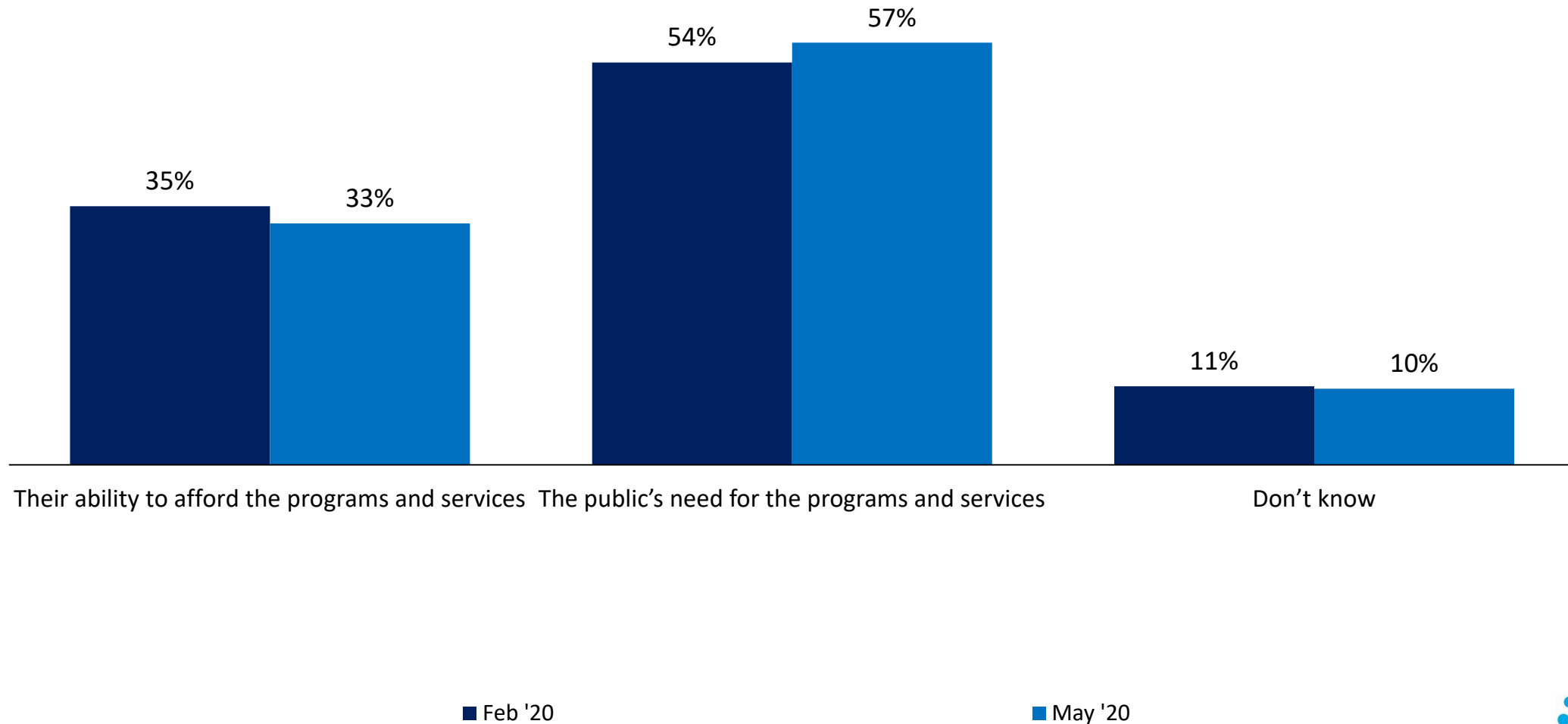
II. Compared to before the COVID-19 outbreak, have views on economic policy changed?

Although the federal deficit still a limited concern, the level of concern is higher now than it was in the last recession.

Spending Decisions: A majority say government decisions should give priority to ability to pay (33%) over the need for services (57%)



When governments make major decisions concerning spending on programs and services, do you think they should be based on ...?

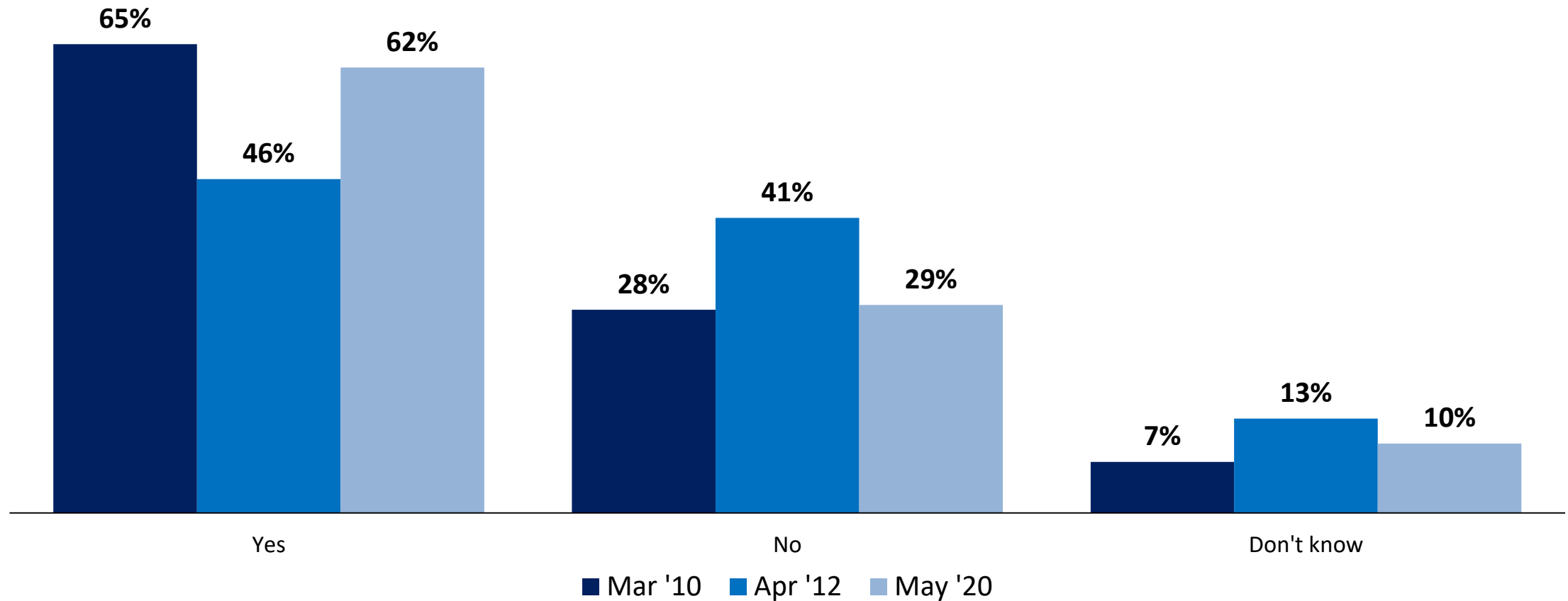


RSH Deficit: The deficit still a limited concern, now returning to 2010 post-recession levels



Have you read, seen or heard anything recently about the federal government running a deficit in its budget?

[asked of all respondents; n=1,000]

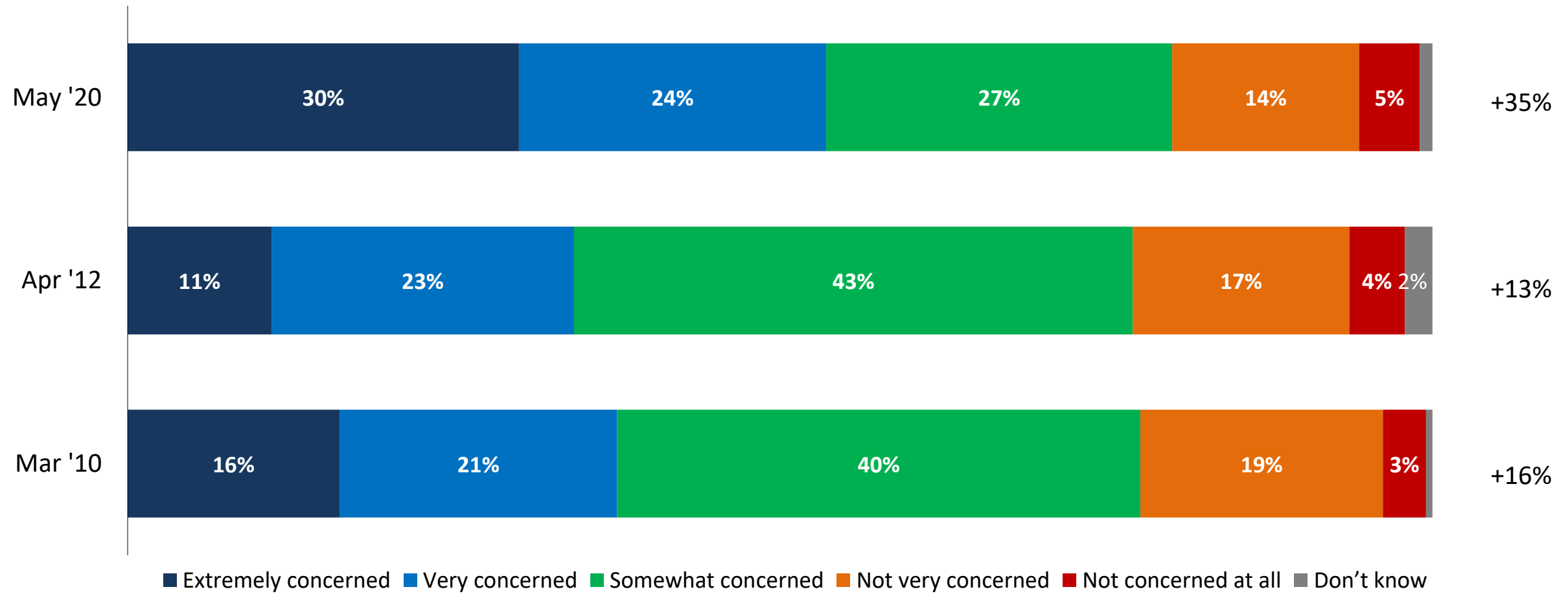


Deficit Concern: Concern about the federal deficit is higher now than it was in 2012 or in 2010 but still with more room to grow



How concerned are you with the current federal deficit?
[asked of all respondents who have read, seen, or heard about federal deficit; n=616]

% Net Concern



III. So where does that leave government?

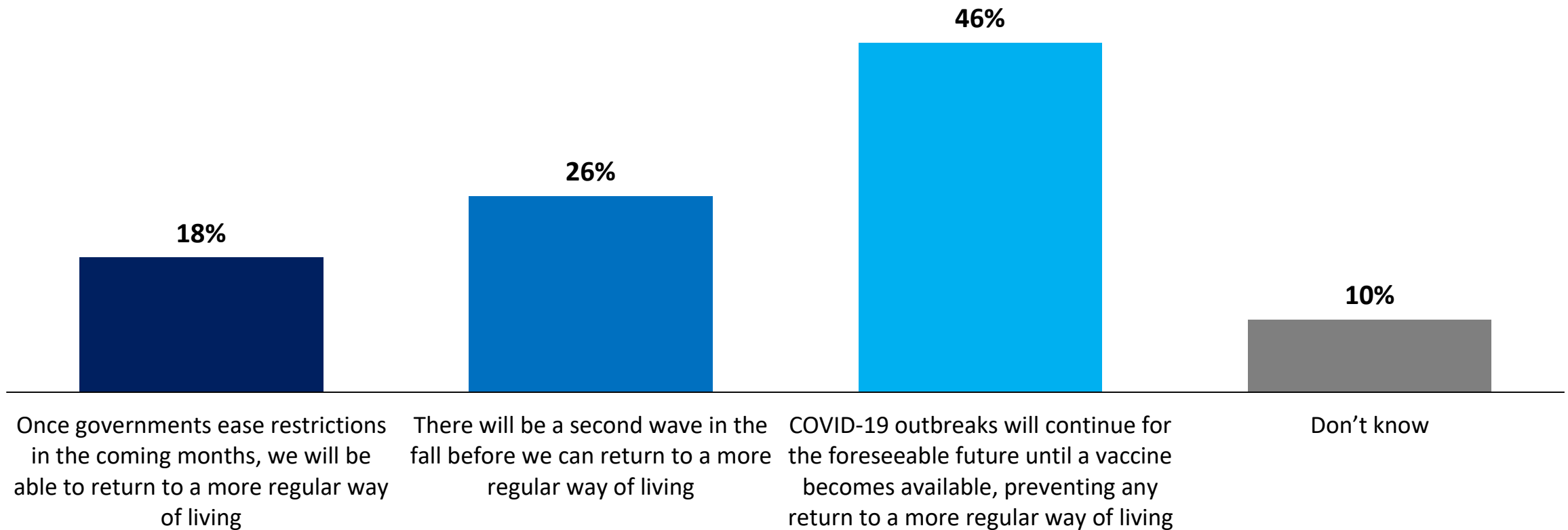
Canadians expect the battle with COVID-19 to be prolonged. For that, they – especially recipients of government benefit programs – are looking to their government for more support down the line.

Future Way of Living: Many Canadians (46%) anticipate the outbreaks will continue for the foreseeable future until a vaccine becomes available



Which of the following comes closest to your point of view?

[asked of all respondents; n=1,000]



Receiving CERB: 1-in-3 (29%) say either themselves or someone in their family has received CERB



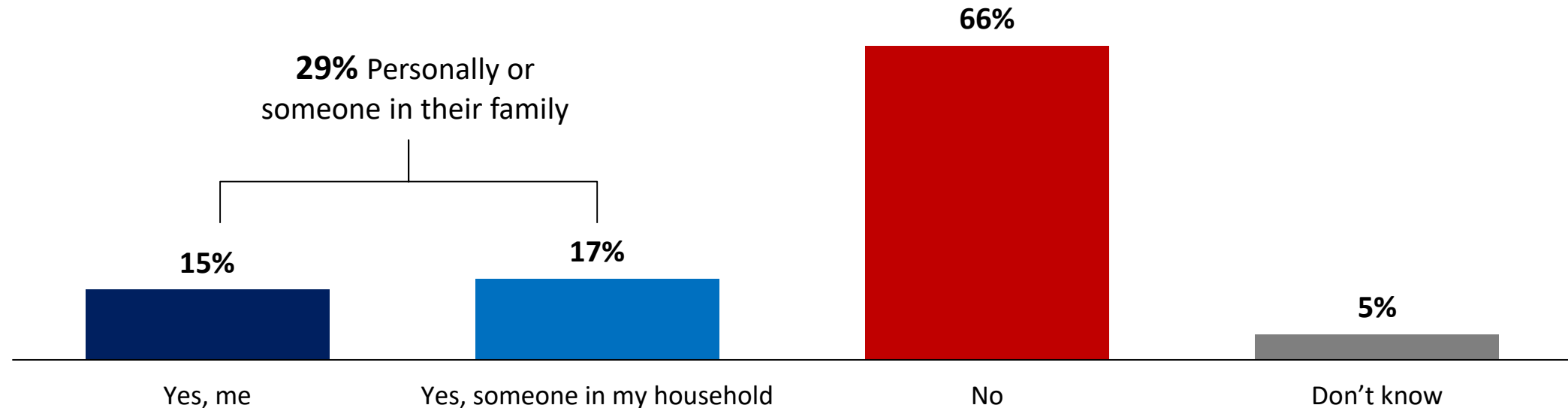
One of the main programs that the Federal government has put into place to assist Canadians impacted by the COVID-19 outbreak is the **Canada Emergency Response Benefit (CERB)**.

The CERB pays \$2,000 a month to Canadians who are unemployed or have incomes under \$1,000 a month due to the COVID-19 outbreak.

Currently, eligible Canadians can receive up to 4 months of support total, for any periods between now and October 3, 2020.

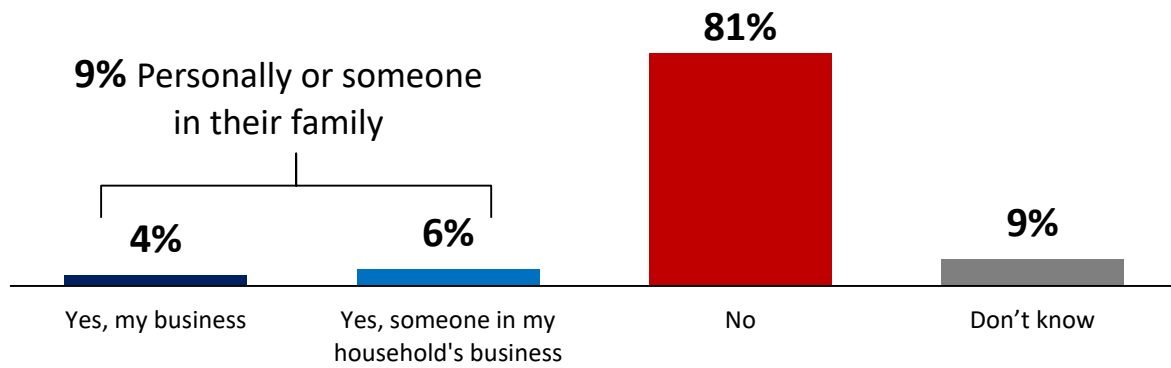
Have you or has anyone in your household received the Canada Emergency Response Benefit? *Please select all that apply.*

[asked of all respondents, multiple mentions allowed; n=1,000]

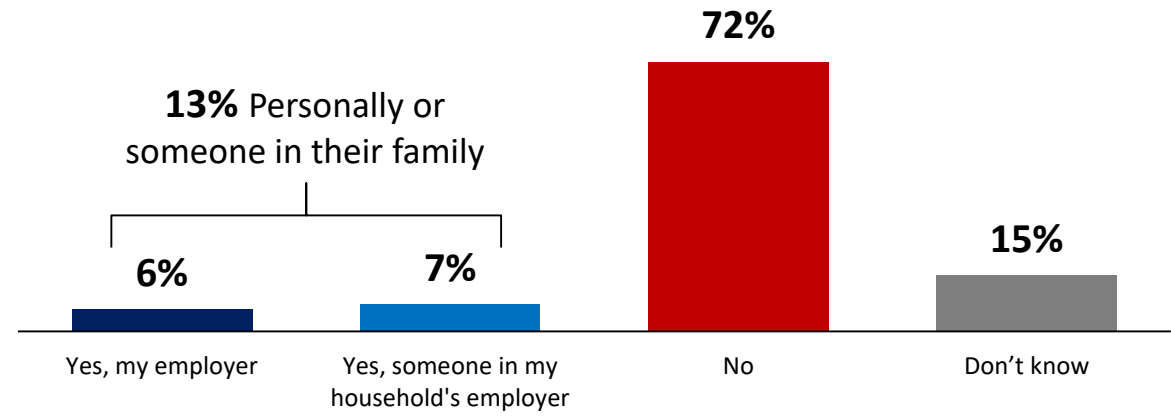


Receiving CEWS: 15% say either their or someone in their household's business or employer has received CEWS

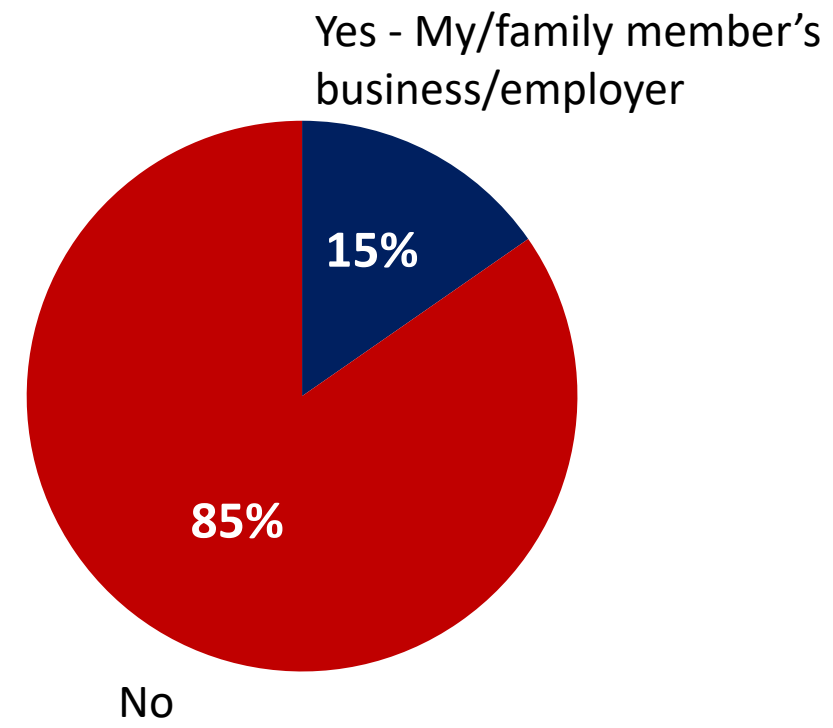
Q Do you or anyone in your household **own** a business (in whole or in part) that has received the **Canada Emergency Wage Subsidy**? *Please select all that apply.*
[asked of all respondents, multiple mentions allowed; n=1,000]



Q Do you or anyone in your household **work for a business** that has received the **Canada Emergency Wage Subsidy**? *Please select all that apply.*
[asked of all respondents, multiple mentions allowed; n=1,000]



My Business or Employer has Received CEWS

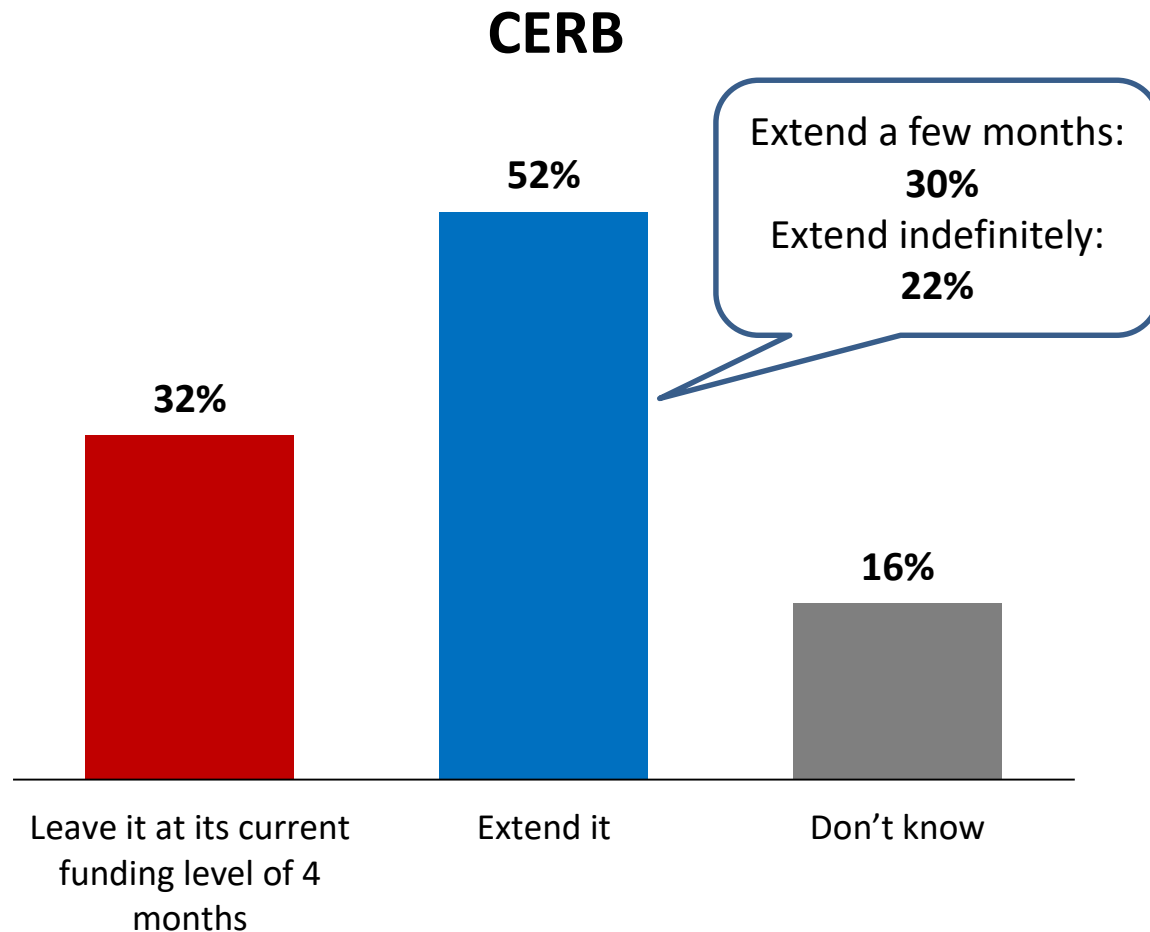


Extending Programs: Support to extend CERB (52%) is 11-pts higher than support to extend CEWS (41%)

Q

In your opinion, should the total number of months someone can receive CERB benefits be left the same, extended for a few months, or extended indefinitely until the COVID-19 outbreak is resolved?

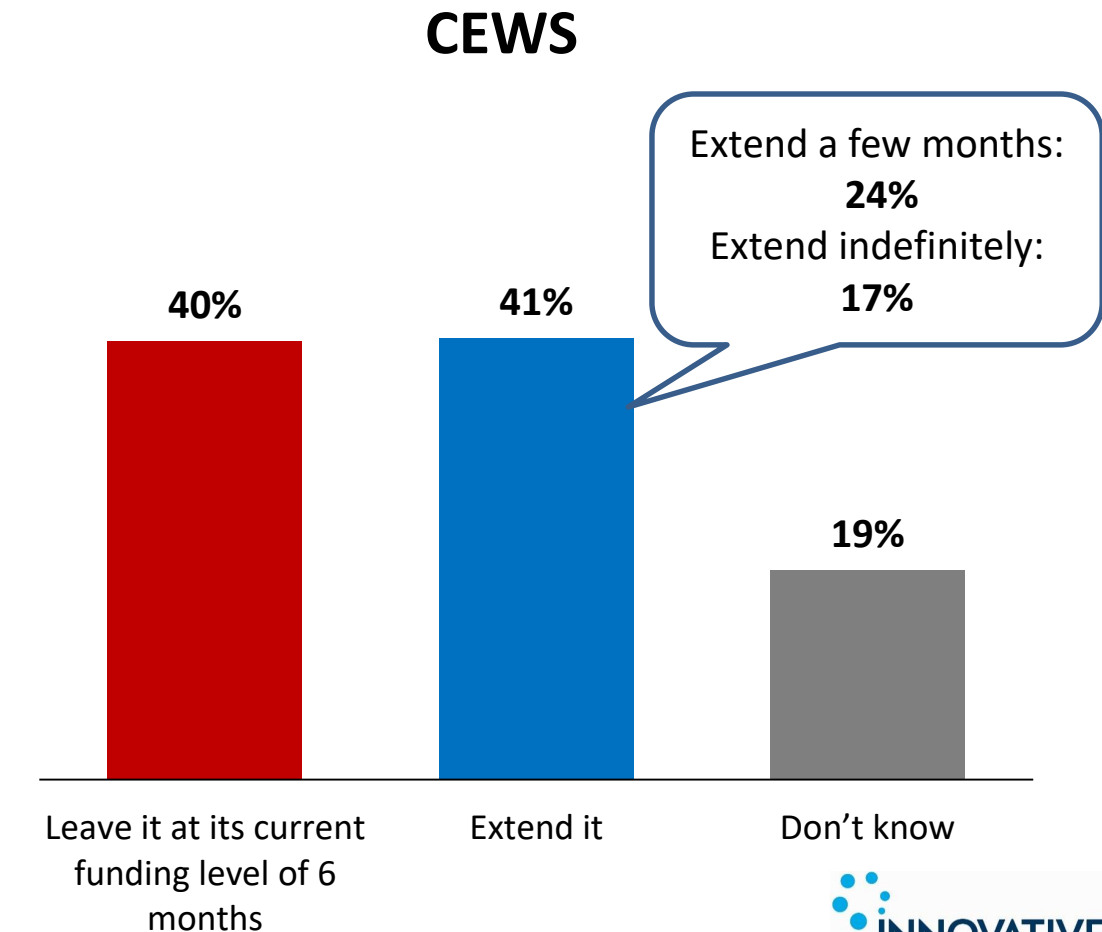
[asked of all respondents; n=1,000]



Q

In your opinion, should the total number of months a business can receive the wage subsidy be left the same, extended for a few months, or extended indefinitely until the COVID-19 outbreak is resolved?

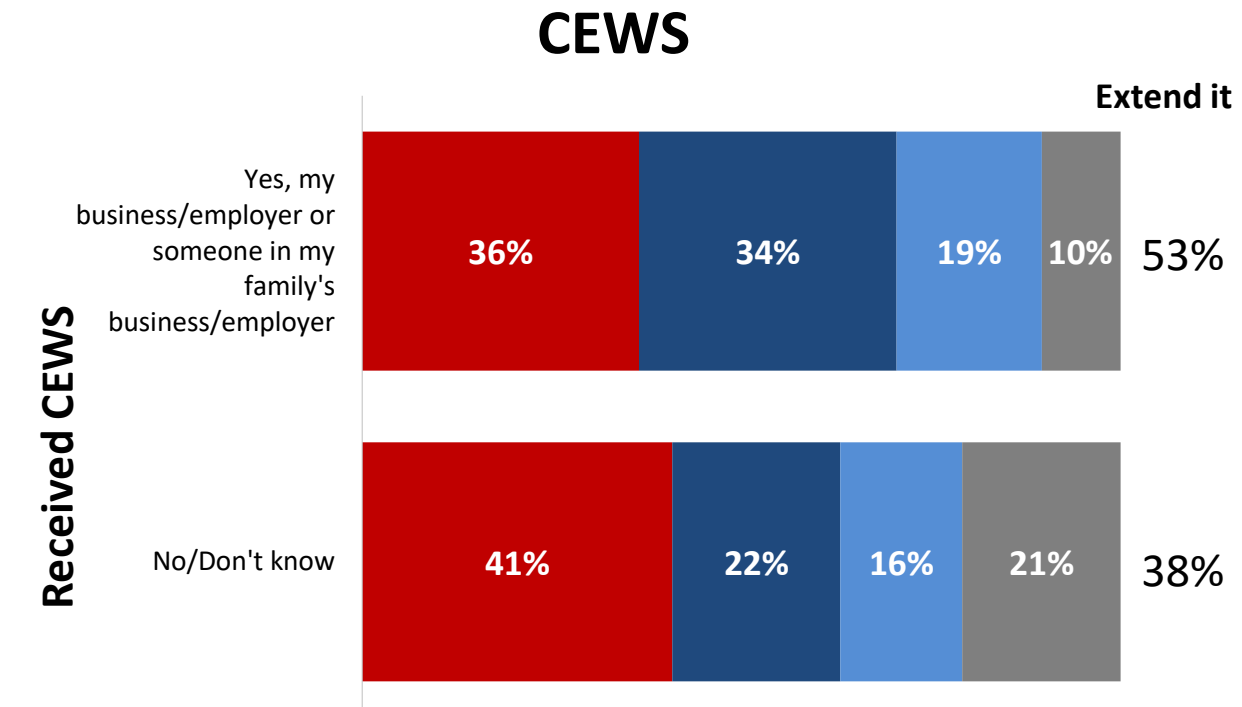
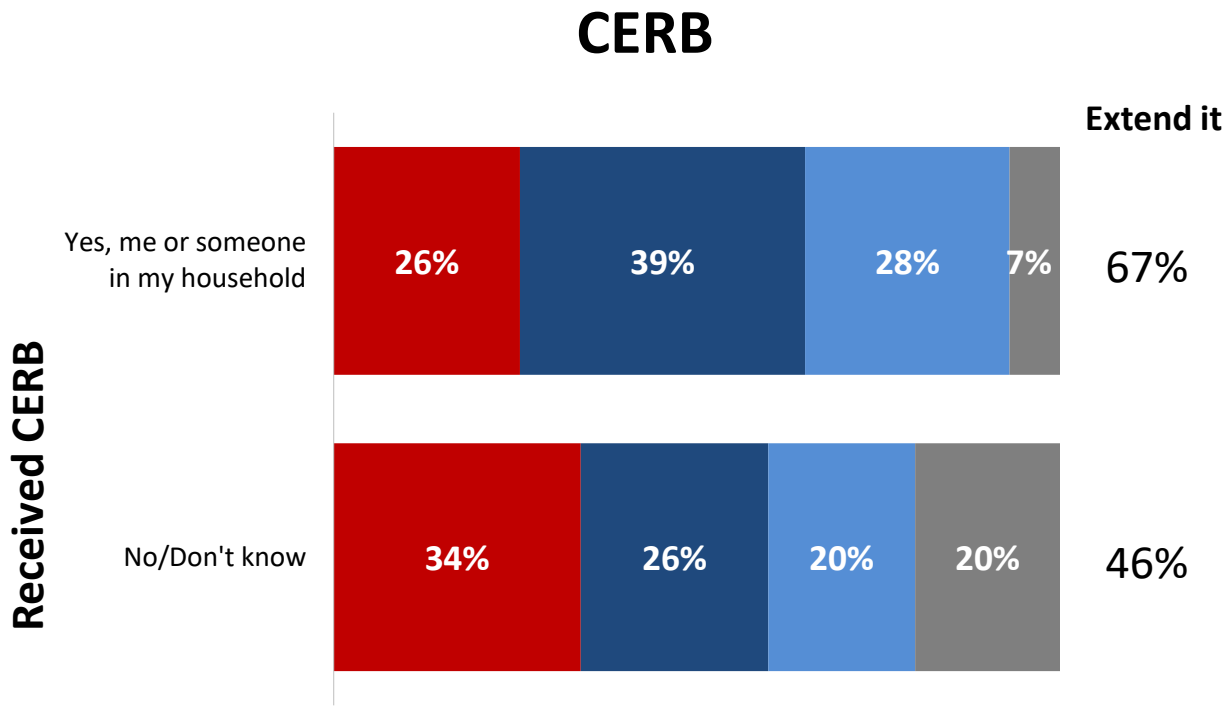
[asked of all respondents; n=1,000]



Extending Programs: For both CERB (67%) and CEWS (53%), support to extend it is higher among those who have received the benefit

Q In your opinion, should the total number of months someone can receive CERB benefits be left the same, extended for a few months, or extended indefinitely until the COVID-19 outbreak is resolved?
[asked of all respondents; n=1,000]

Q In your opinion, should the total number of months a business can receive the wage subsidy be left the same, extended for a few months, or extended indefinitely until the COVID-19 outbreak is resolved?
[asked of all respondents; n=1,000]



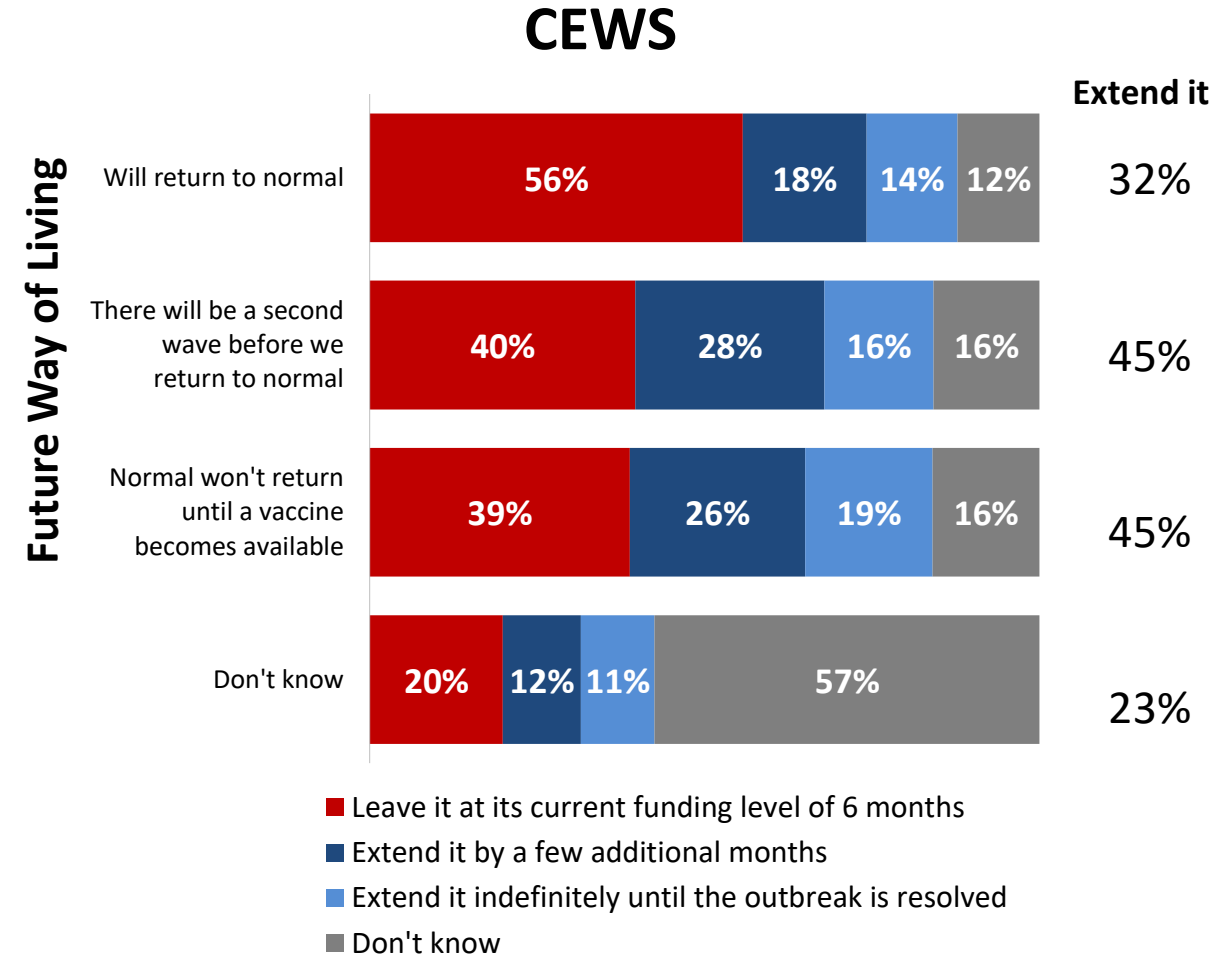
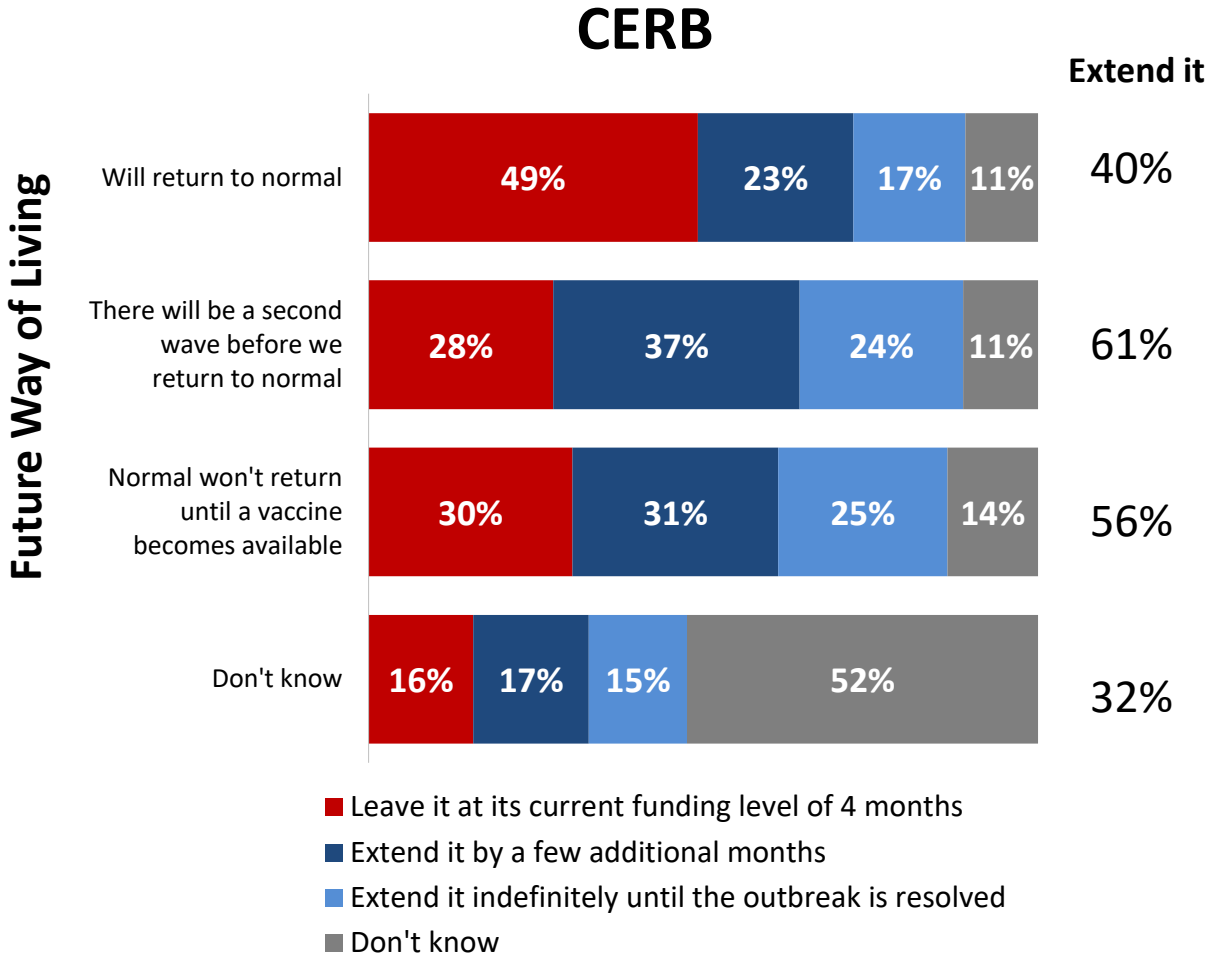
- Leave it at its current funding level of 4 months
- Extend it by a few additional months
- Extend it indefinitely until the outbreak is resolved
- Don't know

- Leave it at its current funding level of 6 months
- Extend it by a few additional months
- Extend it indefinitely until the outbreak is resolved
- Don't know

Extending Programs: Those who think they will return to normal are more likely to say we should leave programs at current funding levels

Q In your opinion, should the total number of months someone can receive CERB benefits be left the same, extended for a few months, or extended indefinitely until the COVID-19 outbreak is resolved?
 [asked of all respondents; n=1,000]

Q In your opinion, should the total number of months a business can receive the wage subsidy be left the same, extended for a few months, or extended indefinitely until the COVID-19 outbreak is resolved?
 [asked of all respondents; n=1,000]

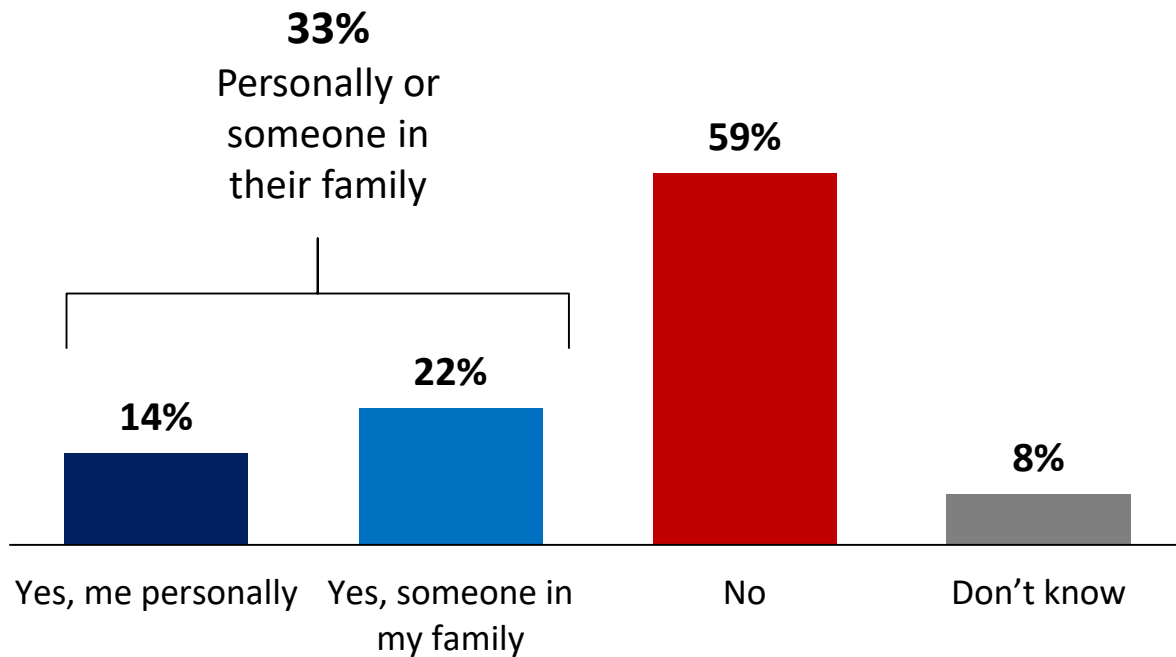


Perceived Impacts: About a third to less than half say their household will continue to face business disruptions



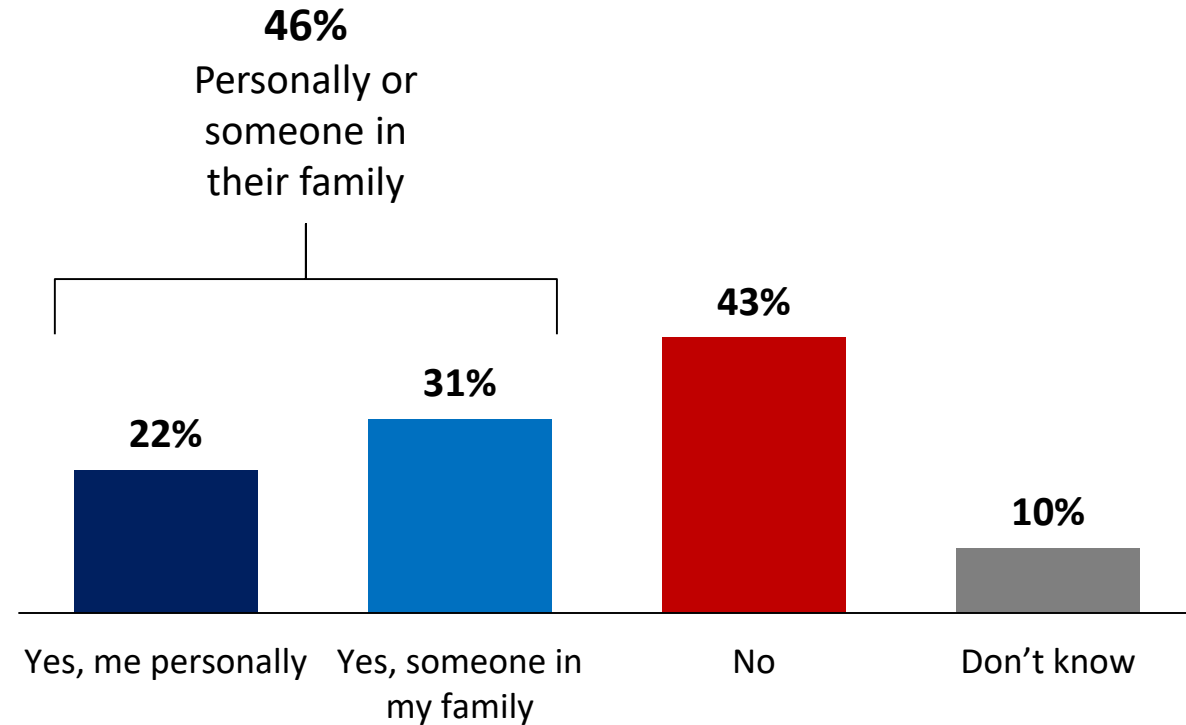
Currently, experts expect that COVID-19 outbreaks will continue in Canada for the foreseeable future. Do you or someone in your family work for a business that may remain shut down for months to come?

[asked of all respondents, multiple mentions allowed; n=1,000]



Do you or someone in your family work for a business that will have to change the way it operates, potentially resulting in increased costs of operation?

[asked of all respondents, multiple mentions allowed; n=1,000]

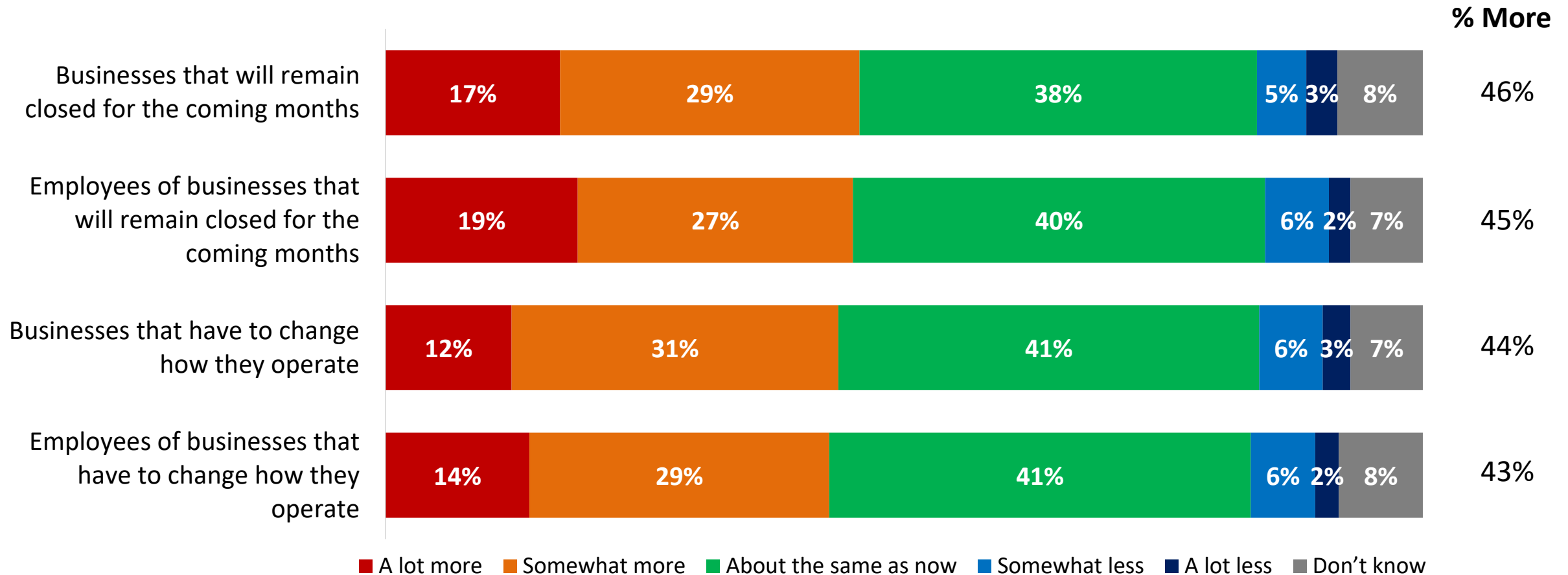


Government Support: Nearly half (46%) say the government needs to offer more support to businesses that will remain closed for months



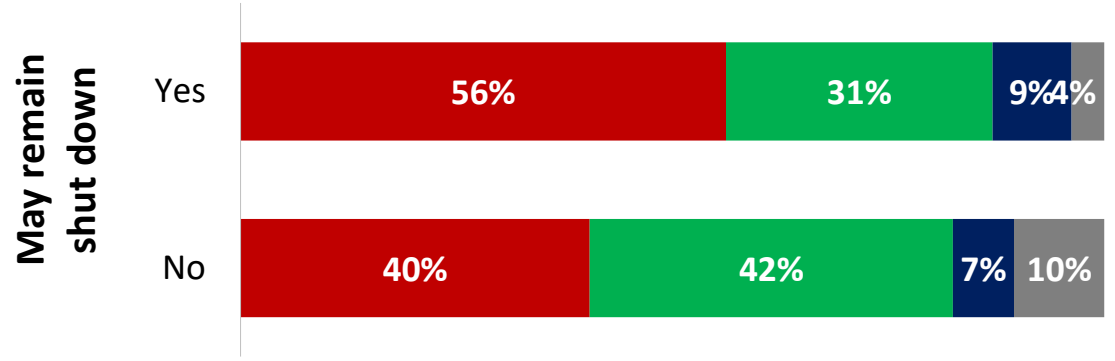
Thinking about the following groups, how much do you think the government should be doing to help support that group?

[asked of all respondents; n=1,000]

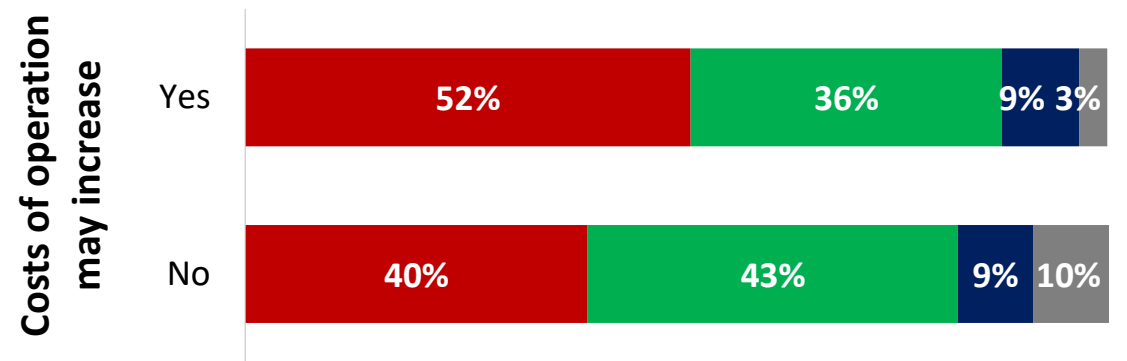


Impact: Those who say their household will be impacted by disruptions are 10+ points more likely to say gov't should provide more support

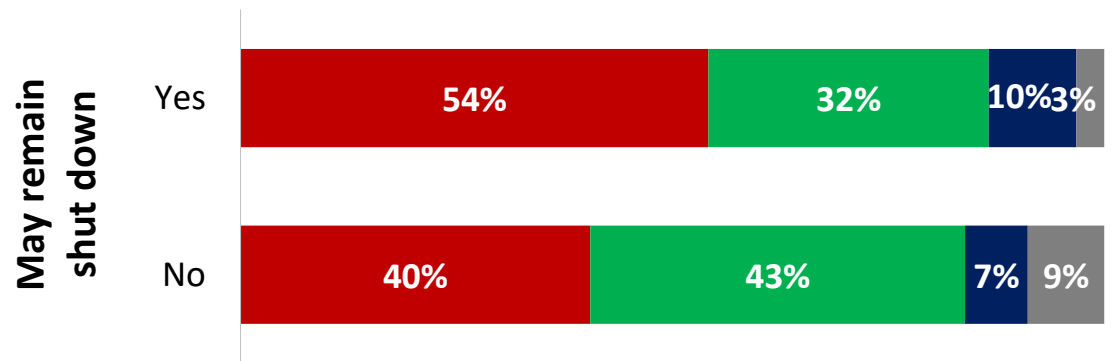
Q Help from government to support **Businesses that will remain closed for the coming months?**



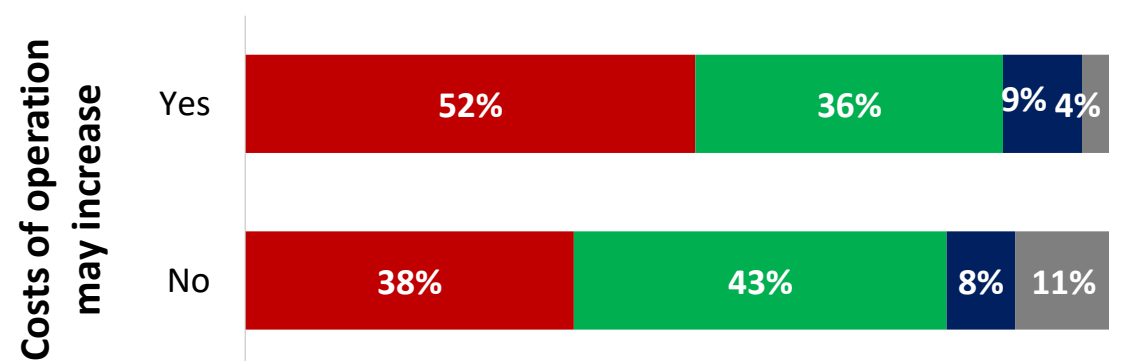
Q Help from government to support **Businesses that have to change how they operate?**



Q Help from government to support **Employees of businesses that will remain closed for the coming months?**



Q Help from government to support **Employees of businesses that have to change how they operate?**



More Same Less Don't know

More Same Less Don't know

III. So where does that leave government?

But Canadians are concerned that benefits may create unintended effects. Many think CERB recipients will continue collecting the benefit instead of working. That concern may be justified as recipients are split on whether they would be worse off taking a job than staying on the benefit.

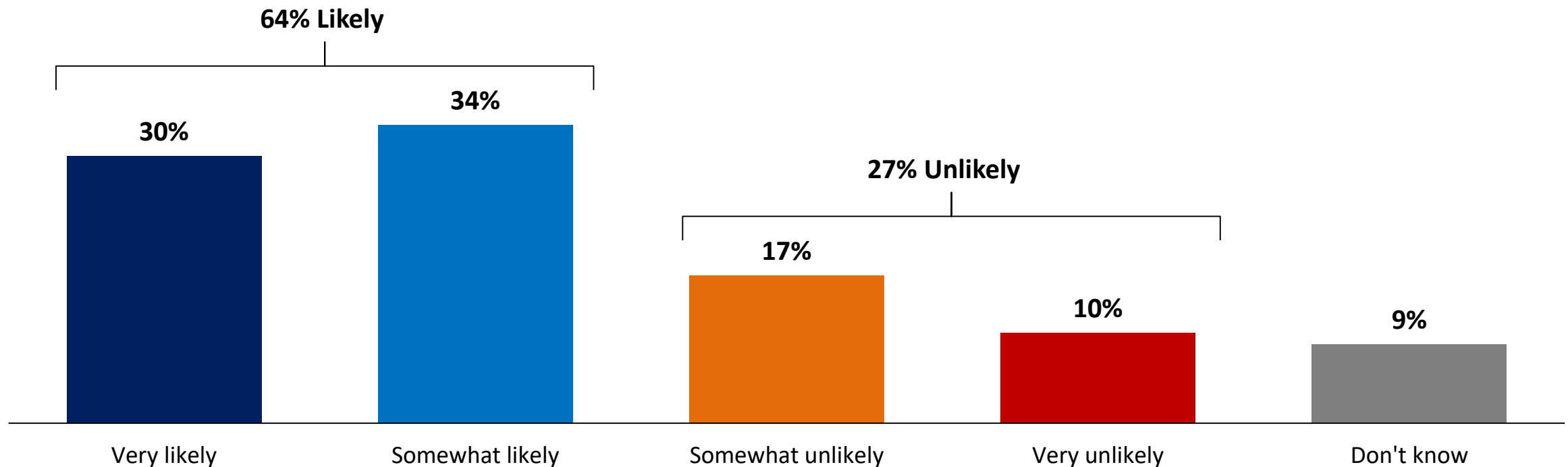
CERB Instead of Returning to Work: A majority (64%) say it's likely some Canadians on CERB will stay on the benefit instead of working



Some people have expressed concerns that Canadians who could work will choose to stay home and collect the CERB even as restrictions are lifted and the economy begins to re-open.

How likely do you think it will be that some Canadians currently on CERB will stay on the benefit rather than returning to work?

[asked of all respondents; n=1,000]



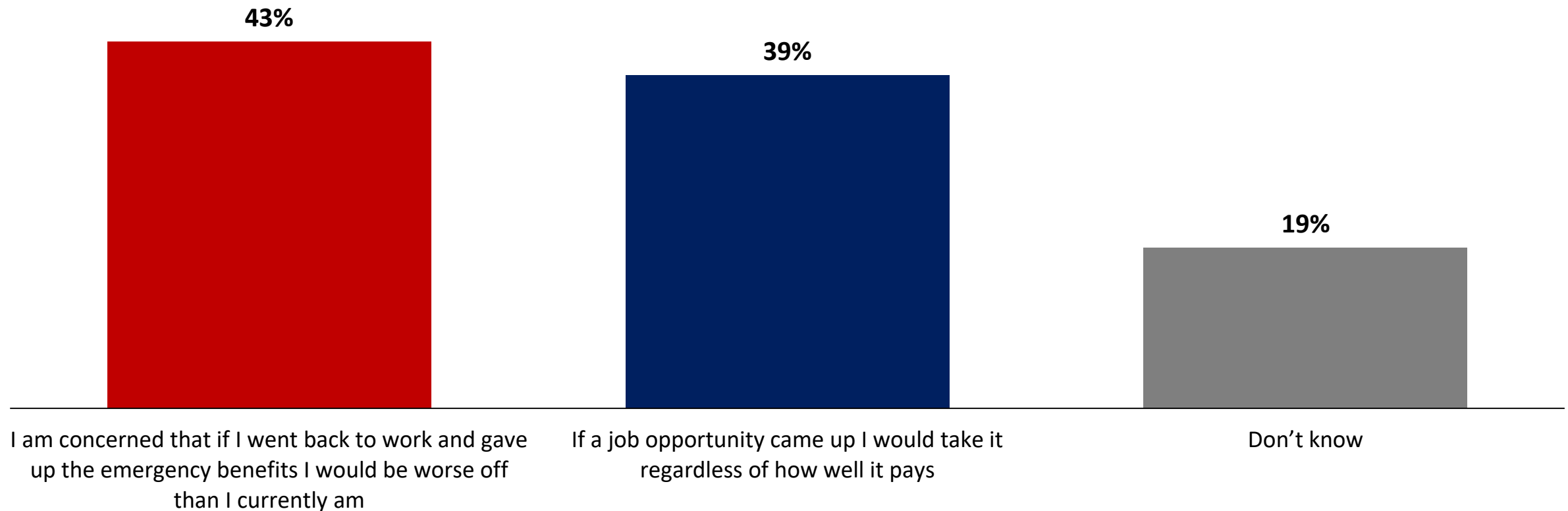
Giving Up Emergency Benefits: 2-in-5 (43%) are concerned about being worse off if they give up emergency benefits⁴⁸



Thinking about your own economic situation, which of the following statements comes closer to your point of view?

[only asked of all respondents who have received the CERB, n=147]

Among those who have received the CERB



III. So where does that leave government?

Childcare and K-12 education may also limit the recovery. While a significant number of parents are worried about access, safety is an even bigger concern.

Impact on Parents and Children: 6-in-10 (62%) parents are concerned about safety surrounding sending children back to daycare or school

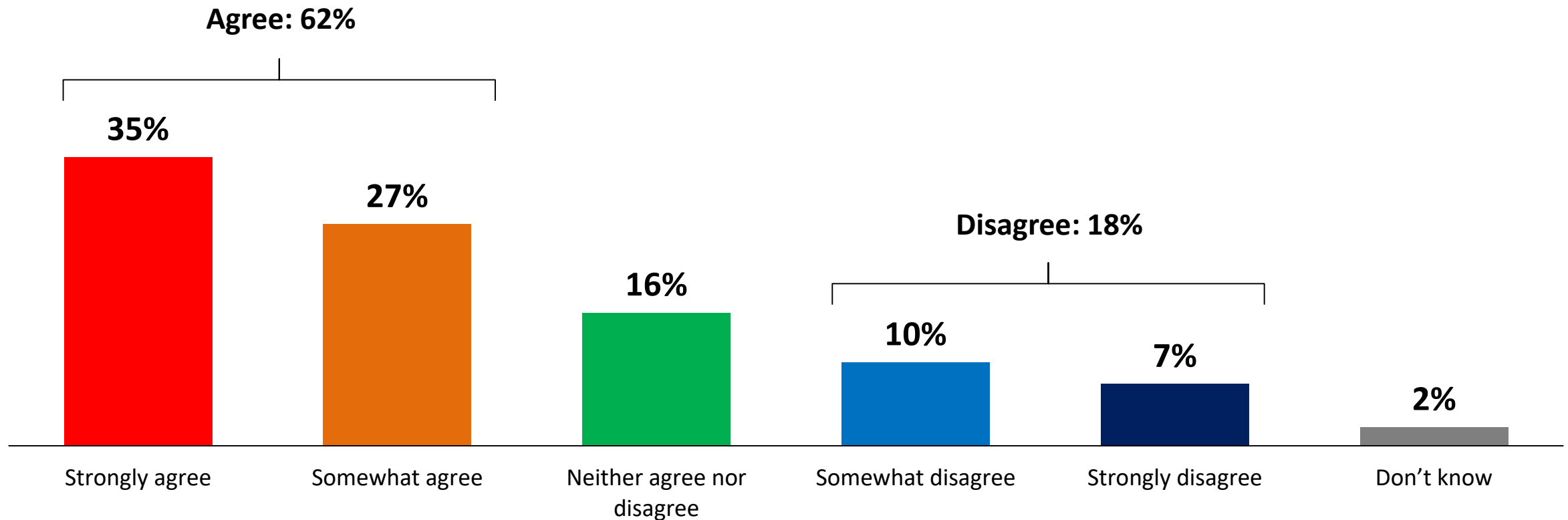


Do you agree or disagree with the following statements?

I am concerned that it won't be safe to send my child to daycare or school even if it is available to me.

[asked of all parents; n=452]

Among All Parents

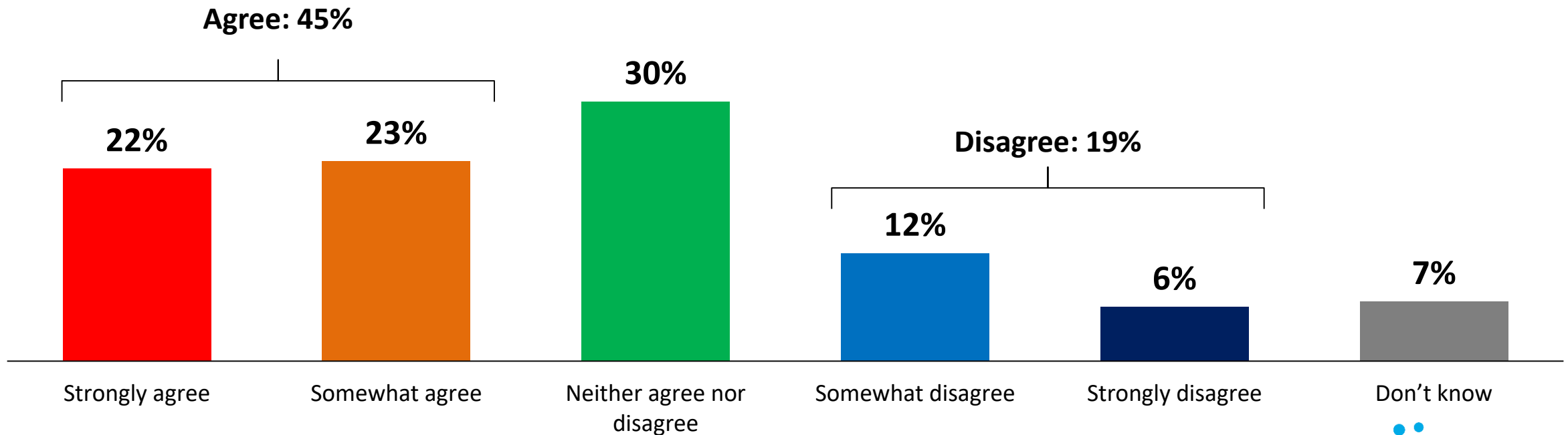


Note: Results on the daycare support come from the same survey conducted over a longer period of time, between May 15th and May 20th with a weighted sample size of 1,500 Canadian residents.

Impact on Parents and Children: Almost half (45%) of non-working parents agree they're concerned about access to childcare

Q Do you agree or disagree with the following statements?
I am concerned I won't be able to get access to the childcare I need to get back to work.
 [asked of non-working parents; n=83]

Among Non-Working Parents



Note: Results on the daycare support come from the same survey conducted over a longer period of time, between May 15th and May 20th with a weighted sample size of 1,500 Canadian residents.

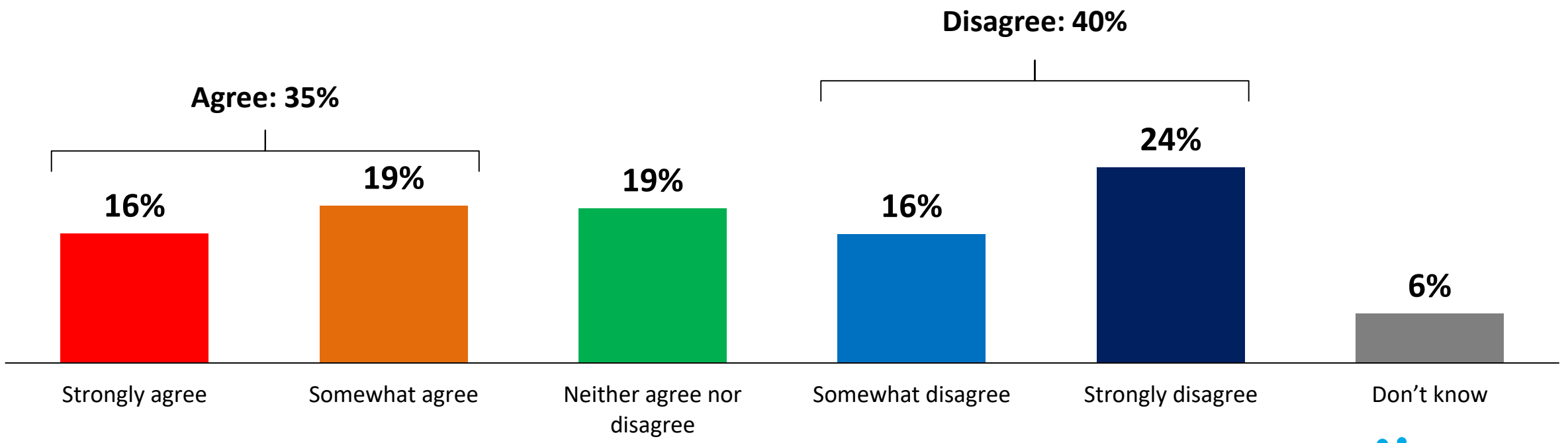
Impact on Parents and Children: Working parents are split on whether they can keep working or not without a childcare solution



Do you agree or disagree with the following statements?
I am not sure I can keep working without a better childcare solution.

[asked of working parents; n=284]

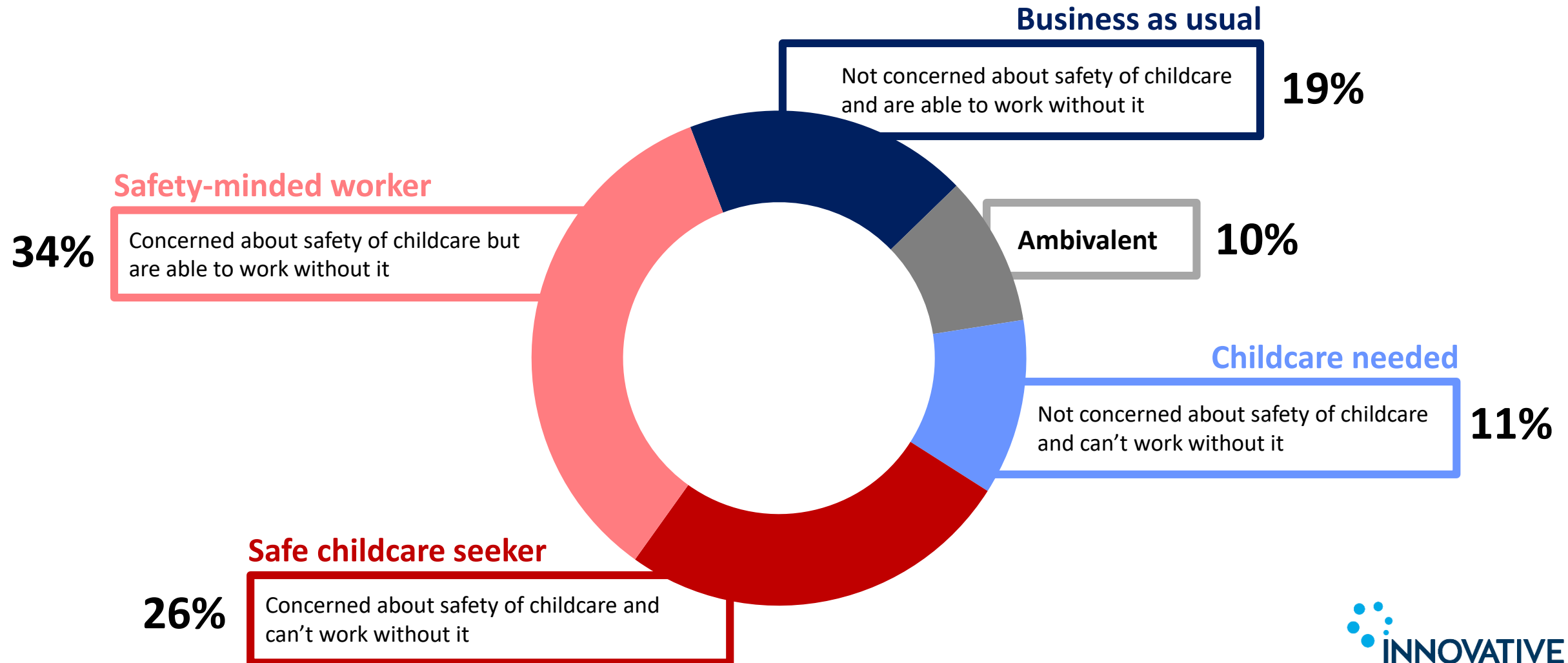
Among Working Parents



Note: Results on the daycare support come from the same survey conducted over a longer period of time, between May 15th and May 20th with a weighted sample size of 1,500 Canadian residents.

Segmenting Canadian Parents in the Workforce

Based on respondents' answers to: "I am not sure I can keep working without a better childcare solution" & "I am concerned that it won't be safe to send my child to daycare or school even if it is available to me."



Methodology

The background of the slide is a solid dark blue color. It features several faint, light blue circles of varying sizes scattered across the surface. The circles are semi-transparent and do not overlap each other.

Survey Methodology

These are the results of an online survey conducted between May 15th and May 19th, 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.

Sample Size: n=1,973 general population, 18 years or older. The results are weighted to n=1,000 based on Census data from Statistics Canada.

Field Dates: May 15th to May 19th, 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.

	Unweighted (n)	Unweighted (%)	Weighted (n)	Weighted (%)
Males 18-34	185	9.4%	137	13.7%
Males 35-54	214	10.8%	167	16.7%
Males 55+	625	31.7%	181	18.1%
Females 18-34	206	10.4%	136	13.6%
Females 35-54	266	13.5%	174	17.4%
Females 55+	477	24.2%	204	20.5%
Region				
BC	413	20.9%	136	13.6%
Alberta	284	14.4%	113	11.3%
Prairies	92	4.7%	67	6.7%
Ontario	822	41.7%	382	38.2%
Quebec	251	12.7%	234	23.4%
Atlantic	111	5.6%	68	6.8%



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Building Understanding.