



Canada This Month Transforming the Economy

Public Opinion Research
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Field Dates: May 29th to June 1st, 2020

The Effect of COVID-19 on the Canadian Economy

The COVID-19 outbreak has had an extensive impact on the Canadian economy. Canada is now faced with the decision to either rebuild the economy as it was before or to make significant changes to the economic systems.

Today, INNOVATIVE is releasing results from the 8th wave of our COVID-19 tracking. This online survey was in field from May 29th to June 1st with a weighted sample size of 1,500 Canadian residents. Detailed methodology is provided in the appendix.

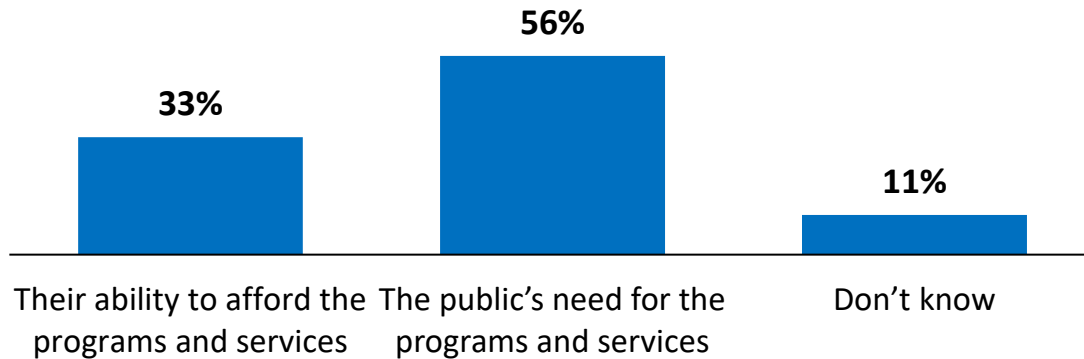
This report covers key results on how Canadians perceive the current economy and their sentiment towards tying relief funding with climate-related reporting.

We group individuals into segments based on key political and economic values and attitudes

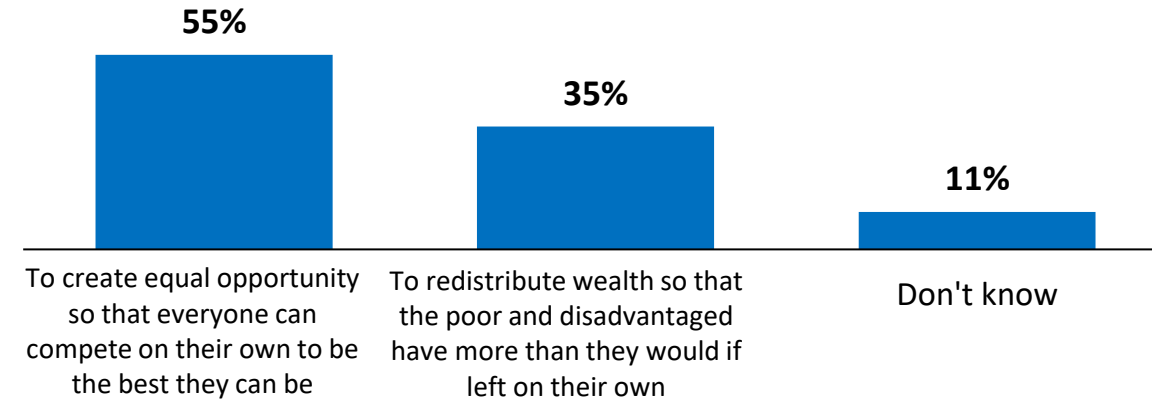
We use these segments throughout the remainder of the report to understand the results.

Core Political Values

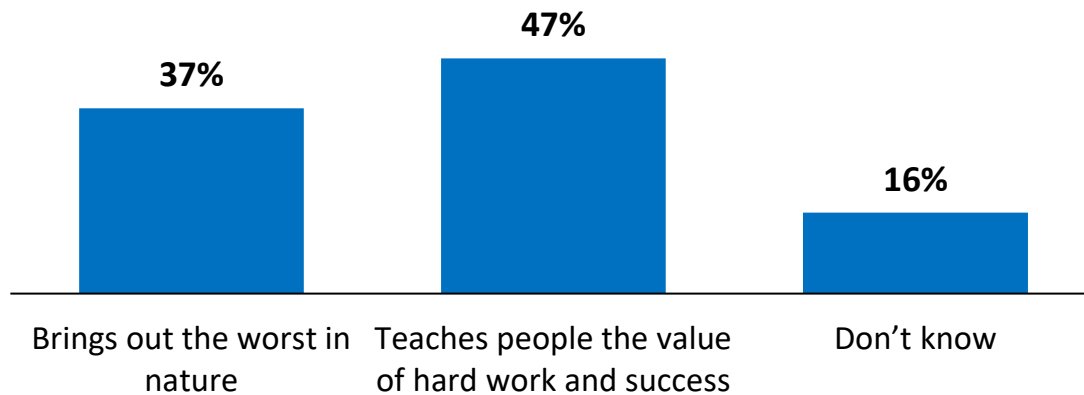
Q When governments make major decisions concerning spending on programs and services, do you think they should be based on ...?



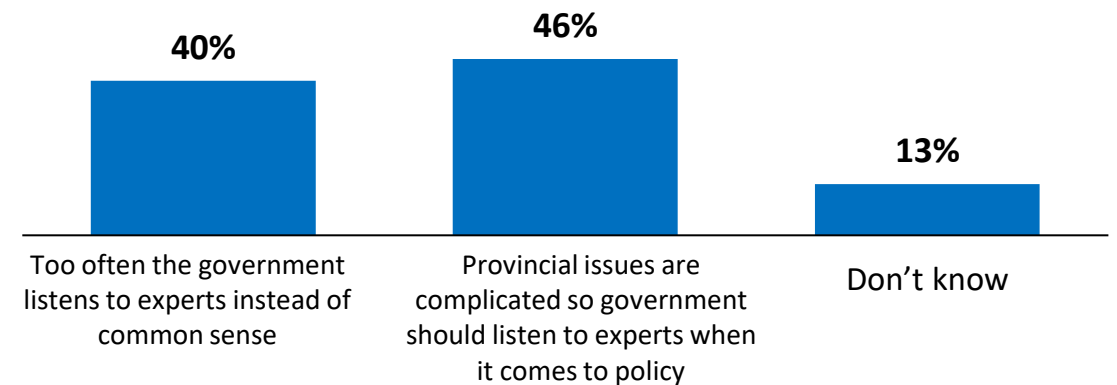
Q Is the main role of government ...?



Q Which one of the following statements comes closest to your view? The profit system ...

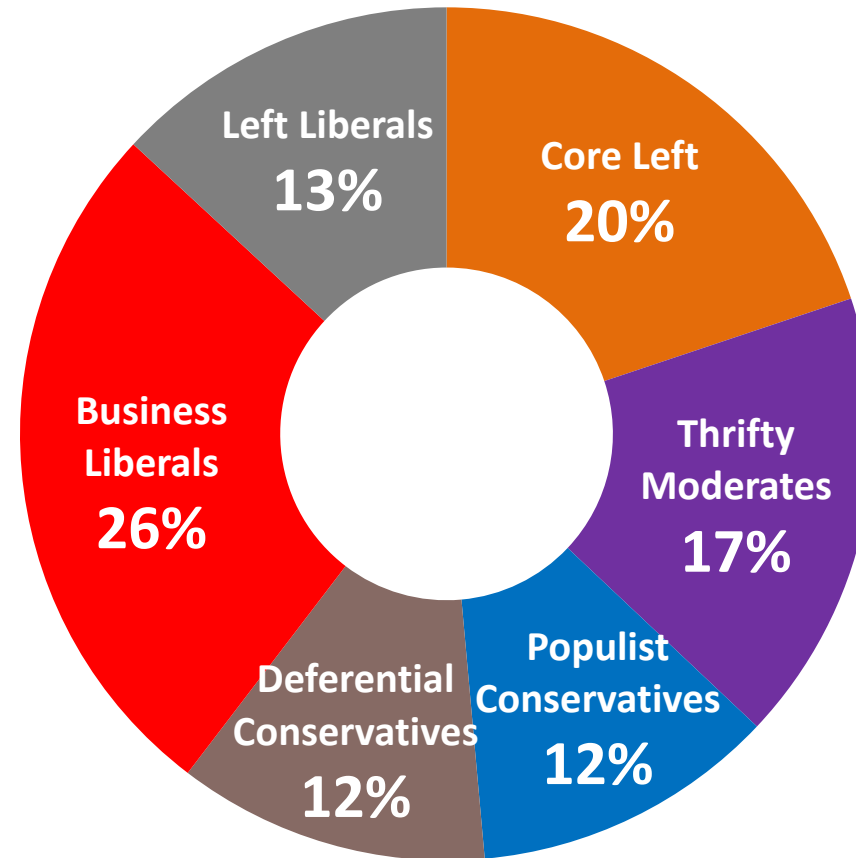


Q When it comes to government decision making, which of the following statements is closest to your view?



Value Clusters

Based on four core political value questions on *equal opportunity versus redistribution*; *trust in the profit system*; *whether spending should be based on ability to afford or public need*; and *whether government should listen to experts or common sense*, we group respondents who share similar values into six segments to better understand their motivations and vote choice.



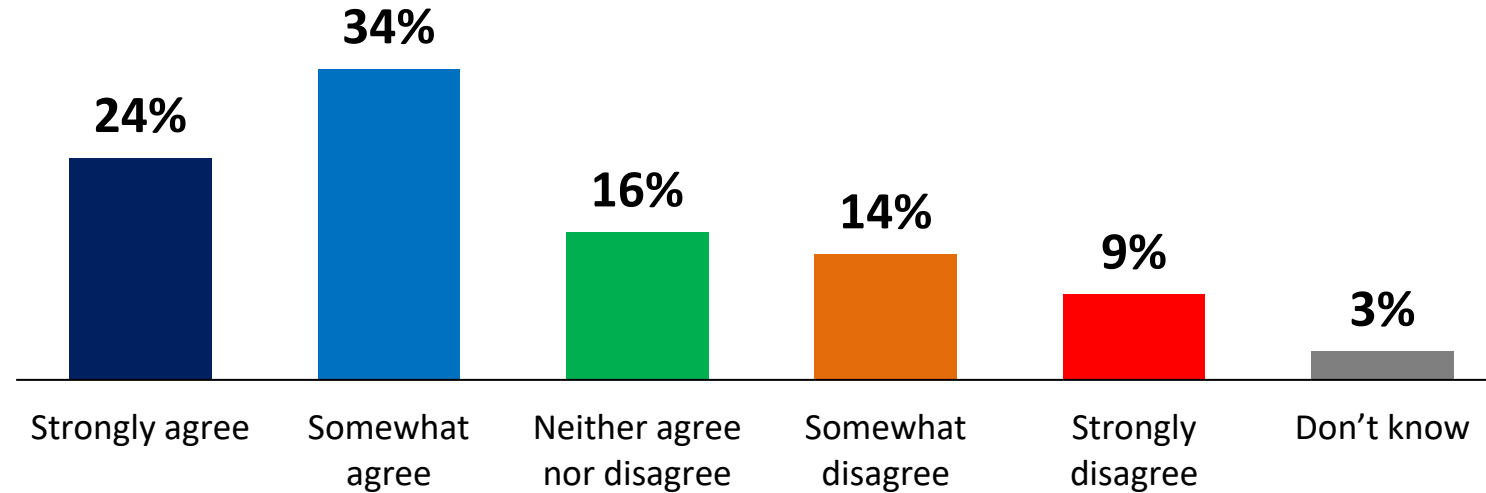
Defining Value Clusters

Core Political Values by Value Clusters

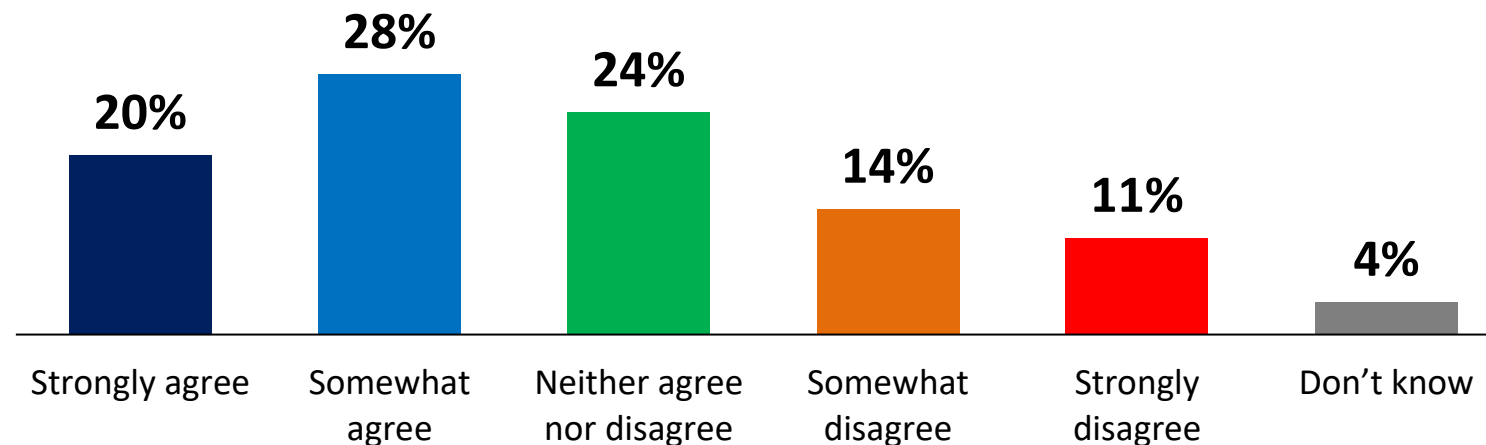
Column %		Core Left	Thrifty Moderates	Populist Conservatives	Deferential Conservatives	Business Liberals	Left Liberals
Is the main role of government to ...?	Create equal opportunity	0%	27%	97%	76%	65%	97%
	Redistribute wealth	95%	37%	0%	20%	26%	0%
The profit system ...	Brings out worst in human nature	86%	54%	0%	0%	0%	80%
	Teaches value of hard work and success	0%	9%	94%	93%	89%	0%
When gov'ts make decisions on spending on programs/services, do you think they should base their decisions on...	Ability to afford	0%	68%	92%	91%	0%	0%
	Public need	94%	0%	0%	0%	97%	89%
When it comes to government decision making...	Rely on common sense	32%	47%	100%	0%	32%	46%
	Listen to experts	59%	20%	0%	90%	57%	40%

Economic Gap Segmentation

Q Do you agree or disagree with the following statement? - Here in [PROV] you can be anything you want if you are willing to work for it.
[asked of all respondents; n=1,500]



Q Do you agree or disagree with the following statement? - No matter how hard I work, every year it seems more difficult to get by.
[asked of all respondents; n=1,500]

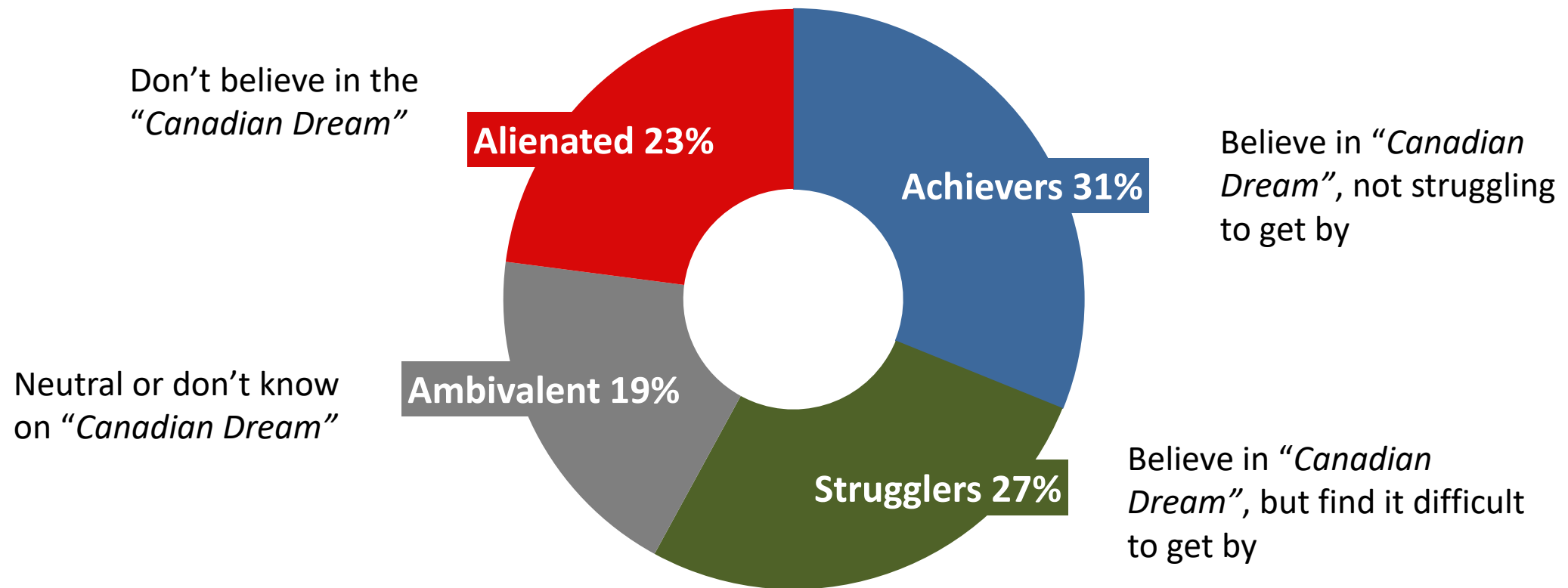


Economic Gap Segmentation

Economic Gap segmentation: Agree with “Here in [PROVINCE] you can be anything you want if you are willing to work for it” (i.e. “*the Canadian Dream*”)

BY Agree with “No matter how hard I work, every year it seems more difficult to get by”.

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

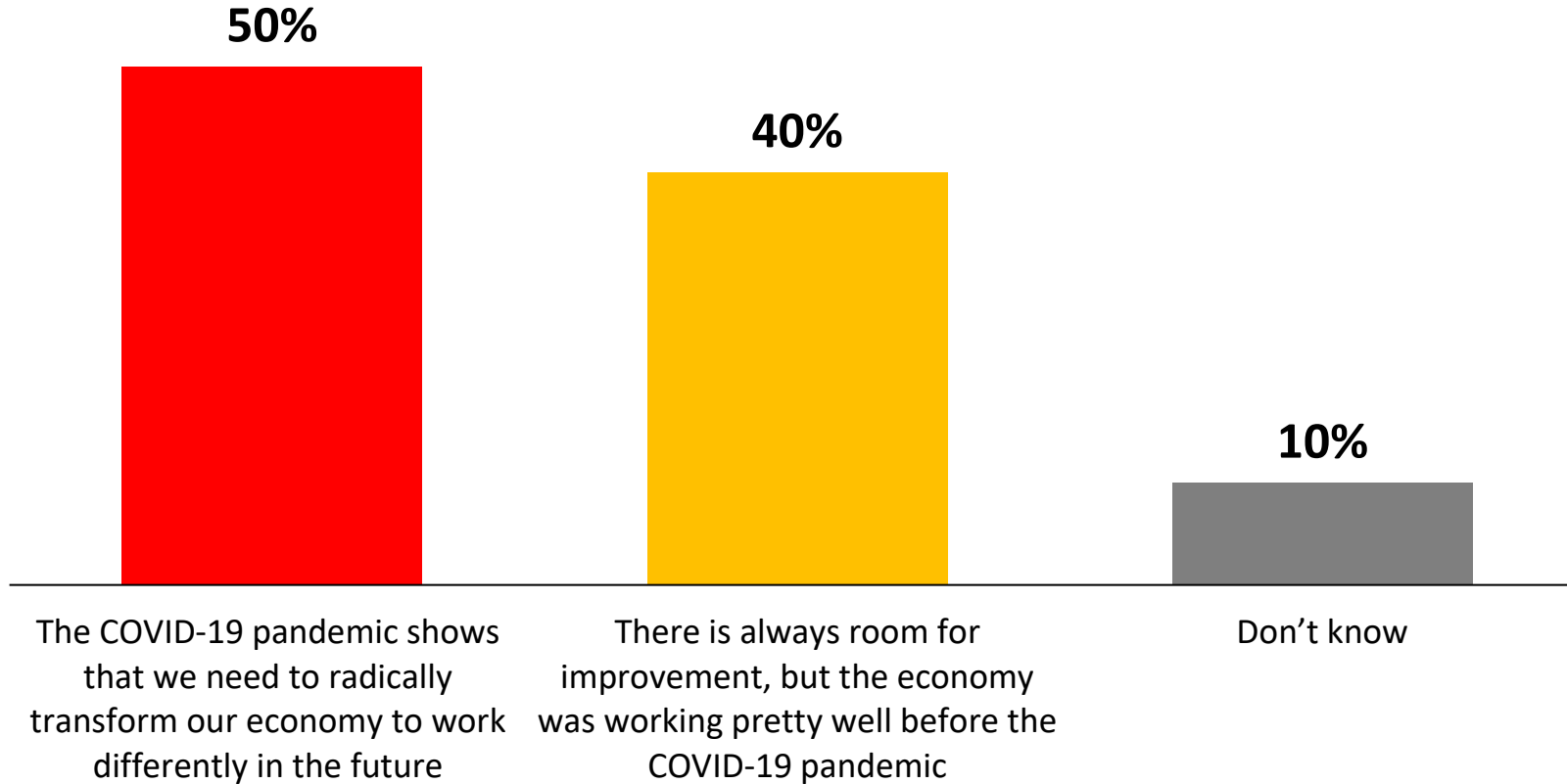


Half of Canadians believe we need to radically transform our economy following the impacts of COVID-19

Transform Economy: Half of Canadians believe we need to radically transform our economy; highest amongst women and NDP partisans

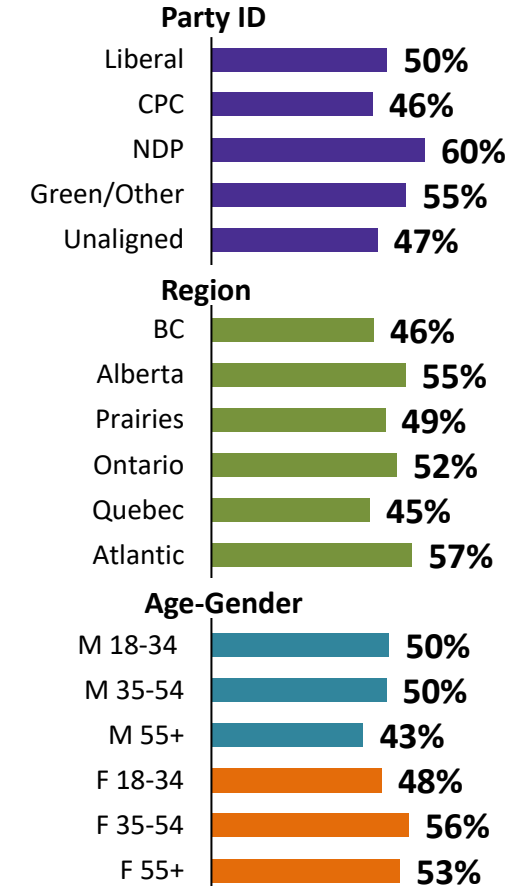


One of the priorities for government has been dealing with the economic impacts of COVID-19. Which of the following comes closest to your point of view?
[asked of all respondents; n=1,500]



Segmentation

Those who say 'Radically transform'



Transform Economy by Clusters: More left clusters tend to support change, more right clusters tend to support status quo



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

BY Value Clusters

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

Column %	Core Left	Thrifty Moderates	Populist Conservatives	Deferential Conservatives	Business Liberals	Left Liberals
The COVID-19 pandemic shows that we need to radically transform our economy to work differently in the future	64%	46%	39%	43%	47%	56%
There is always room for improvement, but the economy was working pretty well before the COVID-19 pandemic	29%	29%	55%	51%	48%	34%
Don't know	7%	26%	6%	6%	5%	10%

Transform Economy by Gap Segmentations: Economically alienated strongly support change, Achievers lean towards status quo



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

BY Gap Segmentations

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

Column %	Achievers	Strugglers	Ambivalent	Alienated
The COVID-19 pandemic shows that we need to radically transform our economy to work differently in the future	42%	50%	46%	65%
There is always room for improvement, but the economy was working pretty well before the COVID-19 pandemic	52%	43%	35%	26%
Don't know	6%	8%	19%	10%

The Large Employer Emergency Financing Facility (LEEFF) is a practical test of the desire for change

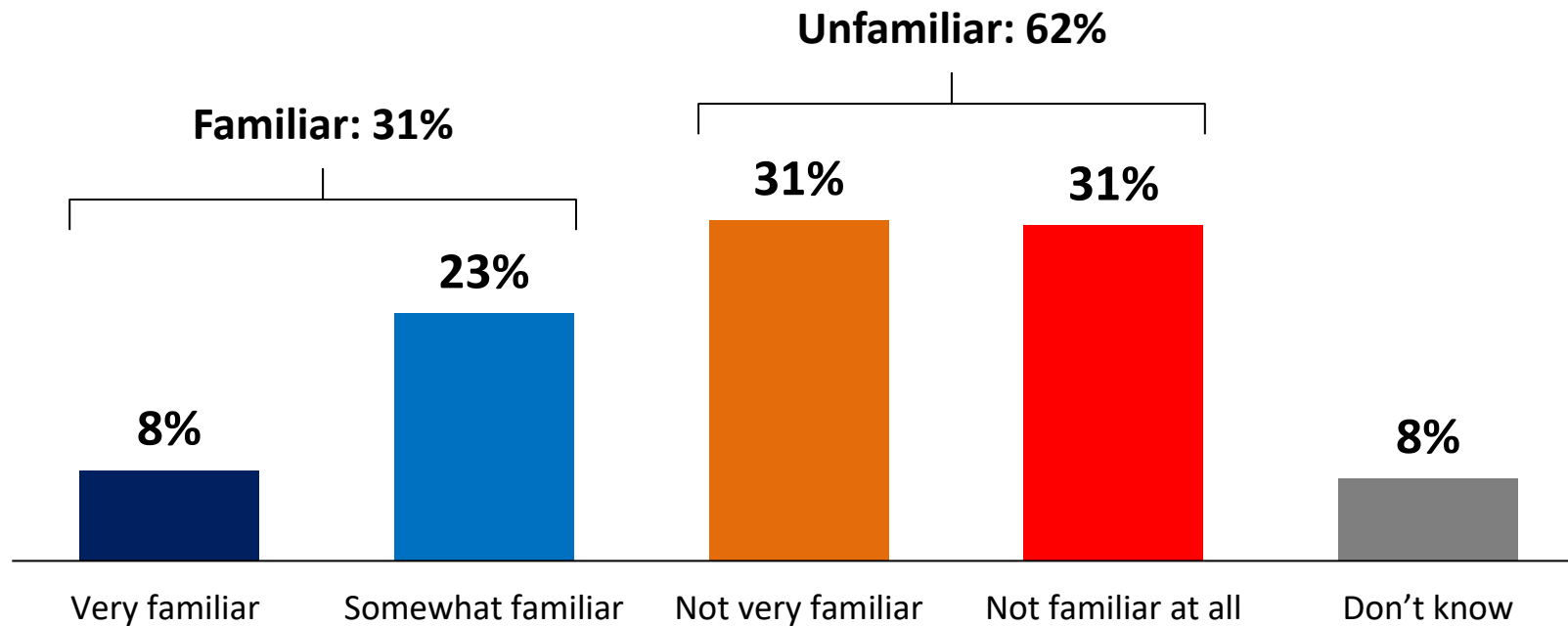
Relief Funding & Climate Goals: A third (31%) say they are familiar with the relief funding proposals; highest amongst males and Ontarians



The federal government has announced a support program for large employers called the Large Employer Emergency Financing Facility (LEEFF). The objective of the program is to support the largest employers in Canada and keep their operations going throughout the COVID-19 crisis. Recipients of funding would also be required to publish climate-related disclosure reports that include how their future operations will support environmental sustainability and national climate goals.

How familiar are you with proposals to tie relief funding to transitioning to a low-carbon economy?

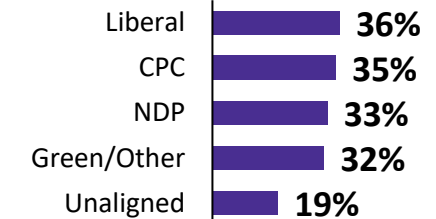
[asked of all respondents; n=1,500]



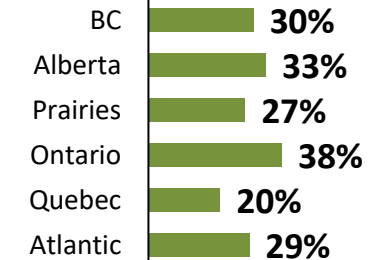
Segmentation

Those who say 'Familiar'

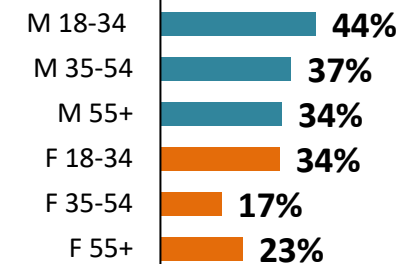
Party ID



Region



Age-Gender



38%

24%

Relief Funding & Climate Goals by Clusters: Populist Conservatives are most familiar with the proposals; Liberals and Core Left least familiar



How familiar are you with proposals to tie relief funding to transitioning to a low-carbon economy?

BY Value Clusters

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

Column %	Core Left	Thrifty Moderates	Populist Conservatives	Deferential Conservatives	Business Liberals	Left Liberals
Very familiar	6%	9%	14%	10%	7%	7%
Somewhat familiar	25%	16%	31%	24%	21%	22%
Not very familiar	34%	26%	26%	32%	34%	31%
Not familiar at all	32%	29%	27%	29%	32%	32%
Don't know	3%	20%	3%	5%	5%	7%
Familiar	31%	25%	44%	34%	28%	30%
Unfamiliar	65%	55%	52%	61%	66%	64%

Relief Funding & Climate Goals by Gap Segmentations: Highest level of familiarity of proposals is amongst Ambivalent segmentation



How familiar are you with proposals to tie relief funding to transitioning to a low-carbon economy?

BY Gap Segmentations

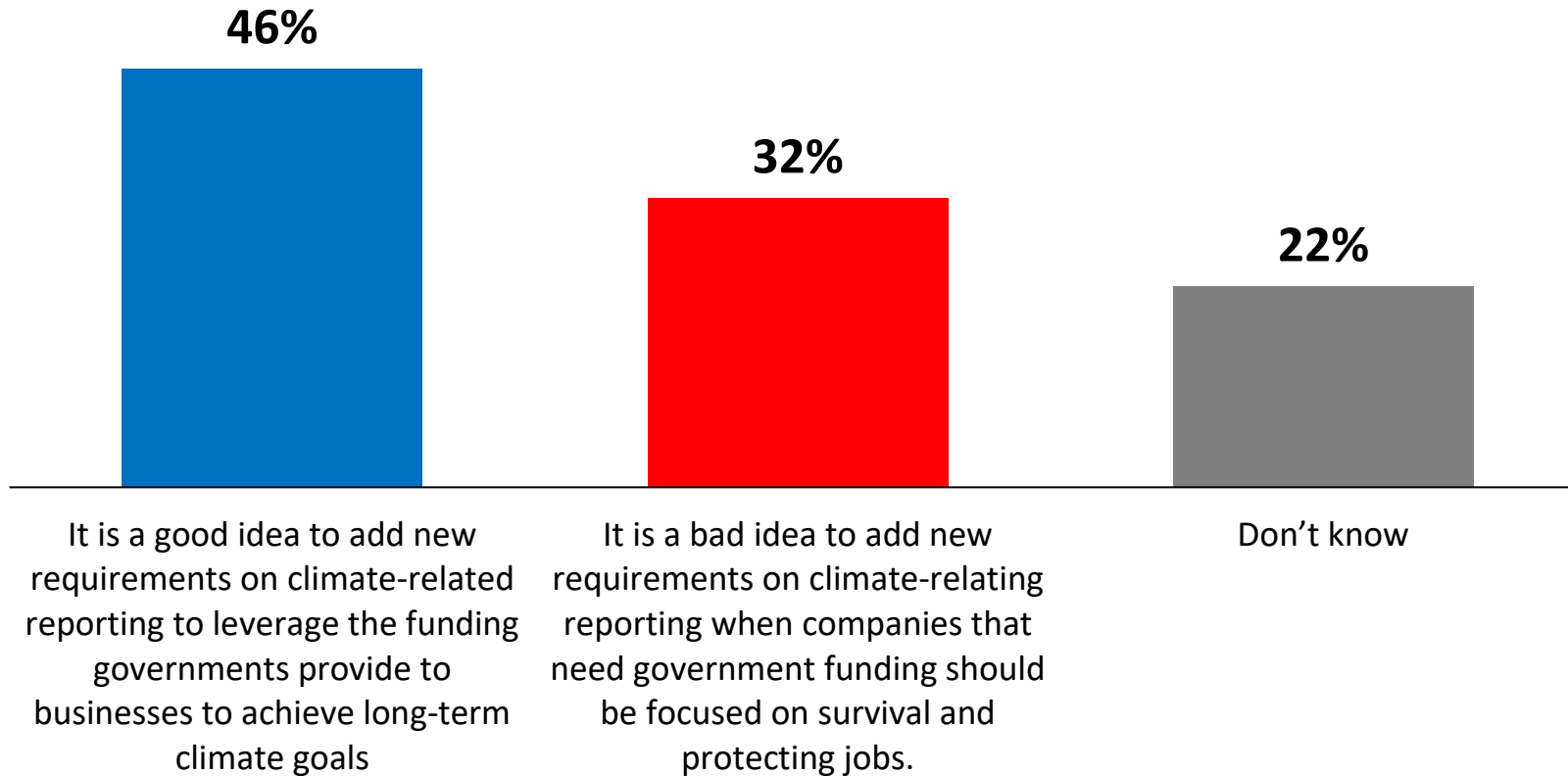
[asked of all respondents; n=1,500]

Column %	Achievers	Strugglers	Ambivalent	Alienated
Very familiar	6%	15%	5%	6%
Somewhat familiar	27%	23%	17%	21%
Not very familiar	32%	32%	31%	30%
Not familiar at all	32%	25%	27%	39%
Don't know	4%	5%	20%	5%
Familiar	31%	33%	38%	22%
Unfamiliar	62%	63%	56%	58%

LEEFF Program Opinion: 46% say it is a good idea to leverage funding with climate-related reporting; highest in Ontario and BC

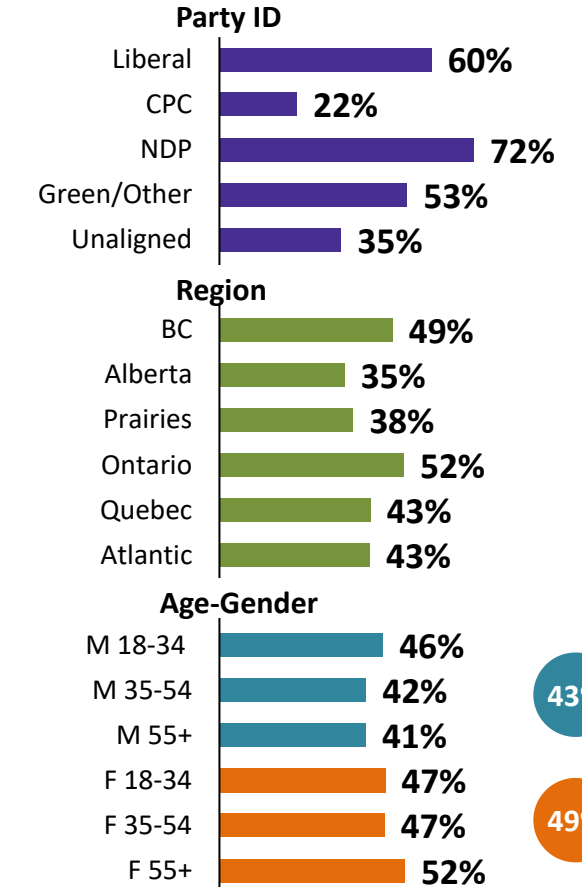


Thinking about the LEEFF program, which of the following comes closest to your point of view?
[asked of all respondents; n=1,500]



Segmentation

Those who say 'It is a good idea'



LEEFF Opinion by Cluster: Centre left clusters support climate reporting by large margins



Thinking about the LEEFF program, which of the following comes closest to your point of view?

BY Value Clusters

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

Column %	Core Left	Thrifty Moderates	Populist Conservatives	Deferential Conservatives	Business Liberals	Left Liberals
It is a good idea to add new requirements on climate-related reporting to leverage the funding governments provide to businesses to achieve long-term climate goals.	69%	36%	19%	38%	48%	53%
It is a bad idea to add new requirements on climate-relating reporting when companies that need government funding should be focused on survival and protecting jobs.	15%	27%	68%	45%	30%	24%
Don't know	16%	37%	13%	16%	23%	23%

LEEFF Opinion by Gap Segmentations: Strugglers divided, other clusters support new climate reporting requirements



Thinking about the LEEFF program, which of the following comes closest to your point of view?

BY Gap Segmentations

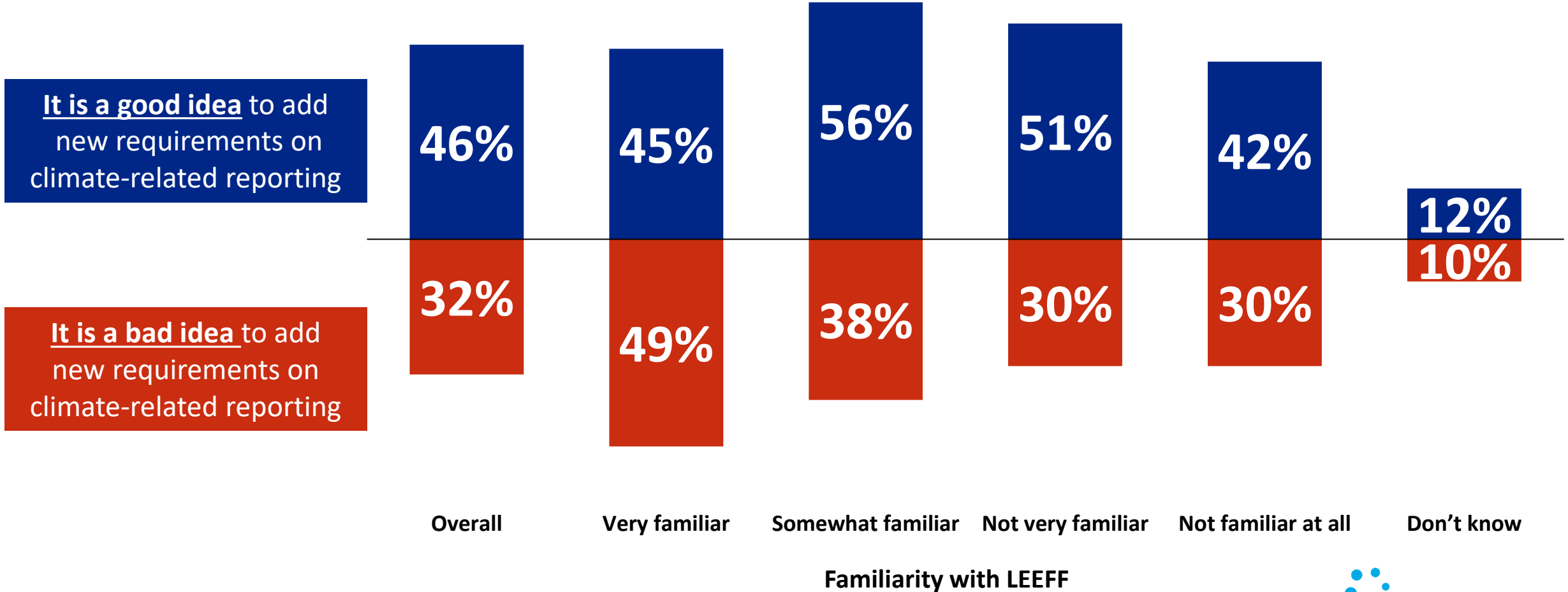
[asked of all respondents; n=1,500]

Column %	Achievers	Strugglers	Ambivalent	Alienated
It is a good idea to add new requirements on climate-related reporting to leverage the funding governments provide to businesses to achieve long-term climate goals.	48%	42%	33%	59%
It is a bad idea to add new requirements on climate-relating reporting when companies that need government funding should be focused on survival and protecting jobs.	33%	38%	26%	27%
Don't know	19%	19%	41%	14%

LEEFF Opinion by Familiarity: Those very familiar with the proposals are slightly opposed; remainder believe it is a good idea



Thinking about the LEEFF program, which of the following comes closest to your point of view?
BY How familiar are you with proposals to tie relief funding to transitioning to a low-carbon economy?
[asked of all respondents; n=1,500]



Note: 'Don't know' not shown.



Methodology

Survey Methodology

These are results of an online survey conducted between May 29th and June 1st, 2020. The survey is still in field to complete oversamples in four smaller provinces.

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=2,246 general population, 18 years or older. The results are weighted to n=1,500 based on Census data from Statistics Canada.

Field Dates: May 29th to June 1st, 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	249	11.1%	205	13.7%
Males 35-54	269	12.0%	250	16.7%
Males 55+	653	29.1%	271	18.1%
Females 18-34	263	11.7%	204	13.6%
Females 35-54	319	14.2%	261	17.4%
Females 55+	493	22.0%	308	20.5%
BC	375	16.7%	206	13.7%
Alberta	304	13.5%	170	11.4%
Prairies	241	10.7%	100	6.7%
Ontario	698	31.1%	573	38.2%
Quebec	359	16.0%	349	23.2%
Atlantic	269	12.0%	102	6.8%



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Building Understanding.