



Public Affairs Association of Canada COVID-19 Impacts on the GR Environment

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Behavioural Changes: A strong majority say they are confident that they're taking all necessary steps to protect themselves from COVID



Do you agree or disagree with the following statements?

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

Results from May 29 – June 1 Polling

NET Agree

I am confident that I am taking all the steps needed to protect myself and my family from COVID-19



+76%

I am worried that if we don't take special precautions COVID-19 could come back and put more lives at risk



+67%

■ Strongly agree

■ Somewhat disagree

■ Somewhat agree

■ Strongly disagree

■ Neither agree nor disagree

■ Don't know

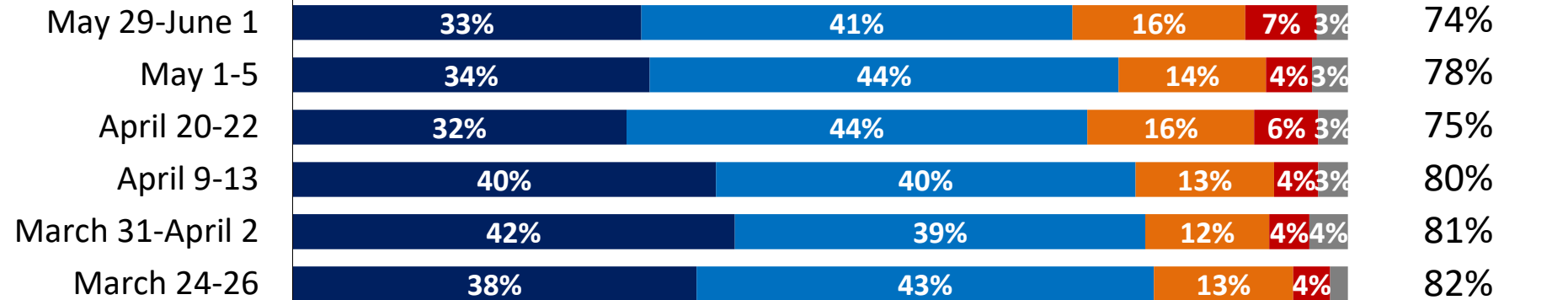
Concern: Concern that a vulnerable friend or relative will contract the virus is down 4-pts since early May to 74%



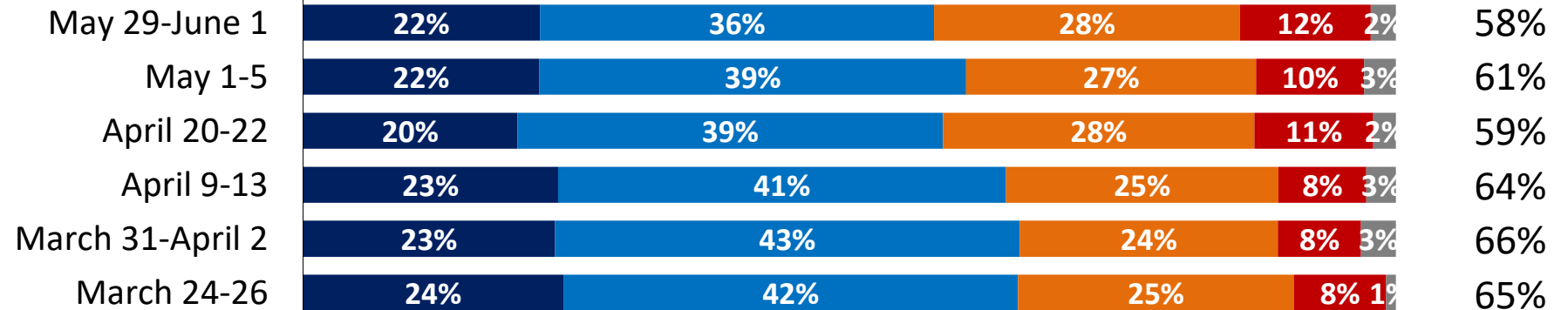
How concerned are you personally about each of the following?

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

That a vulnerable friend or a relative will contract COVID-19



That you yourself will contract COVID-19



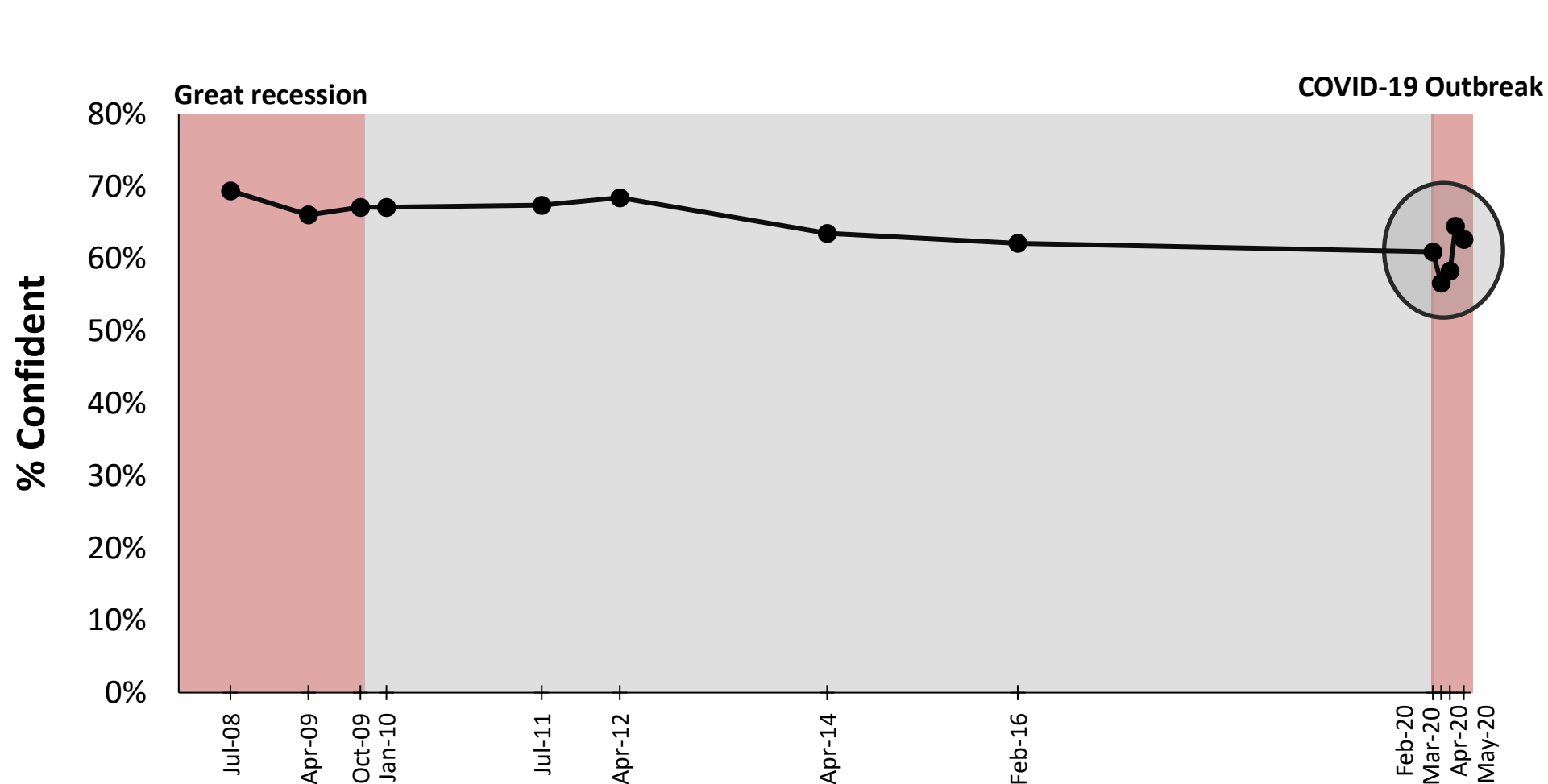
■ Very concerned
 ■ Somewhat concerned
 ■ Not very concerned
 ■ Not at all concerned
 ■ Don't know

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

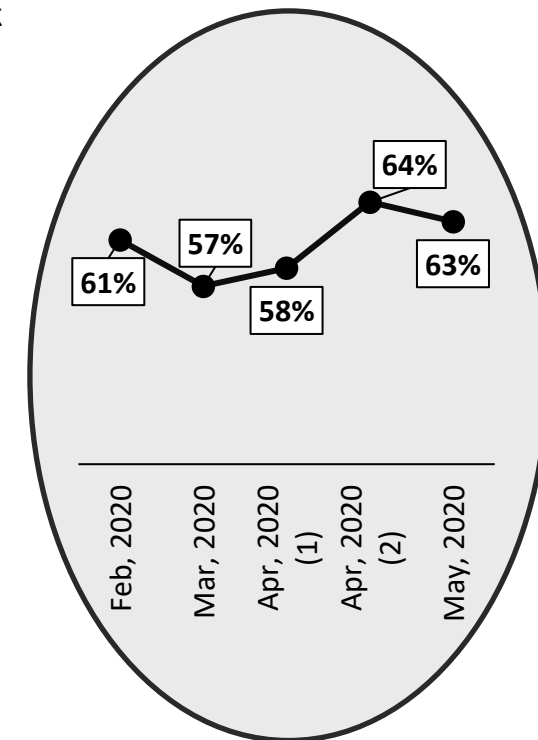


Generally speaking, how confident and secure do you feel about your household's current financial situation?

[all respondents, n=1,500]



Highlight on recent tracking



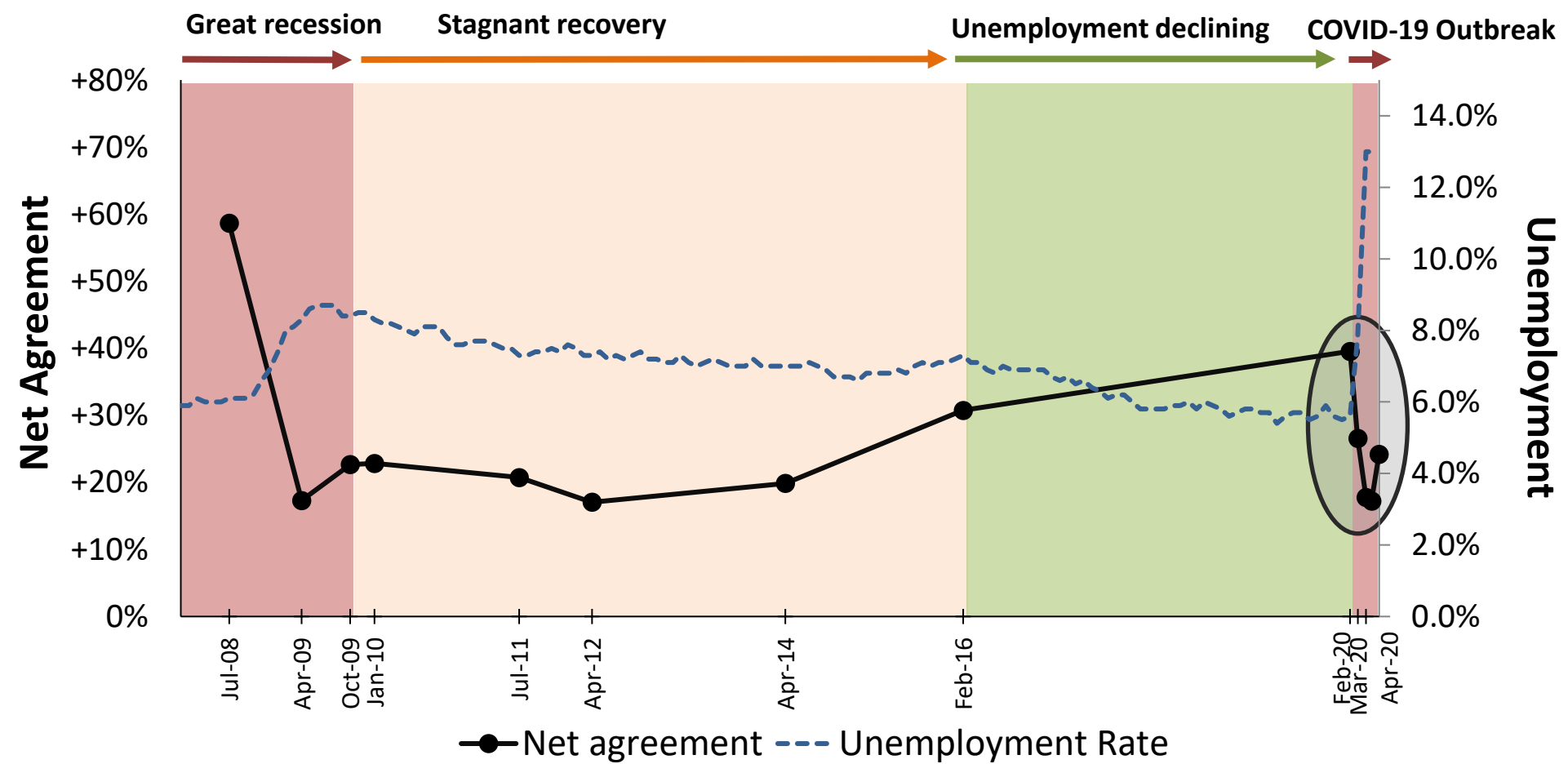
Notes: Two data points are shown for April 2020 (both waves of April tracking)

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

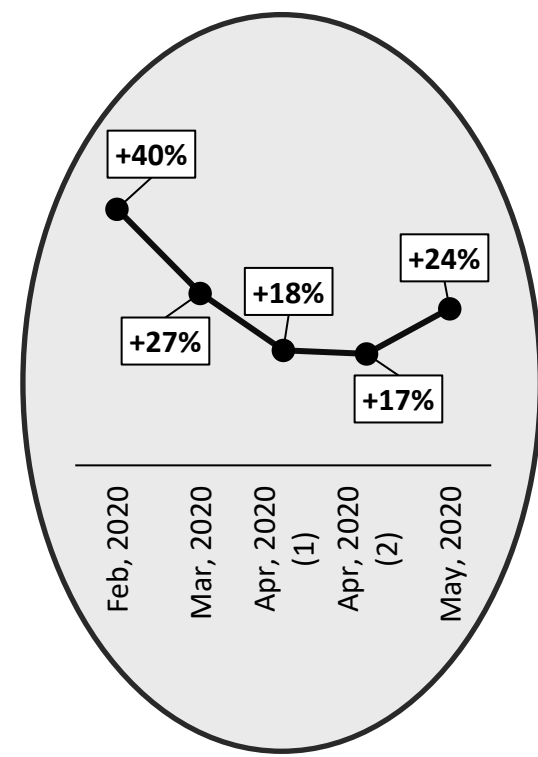


Net agreement: I feel confident that I could get another job somewhere else if I wanted to
[results shown of those who are currently employed; n=689 for the current wave]

Among those who are currently employed



Highlight on recent tracking



Notes: Two data points are shown for April 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.

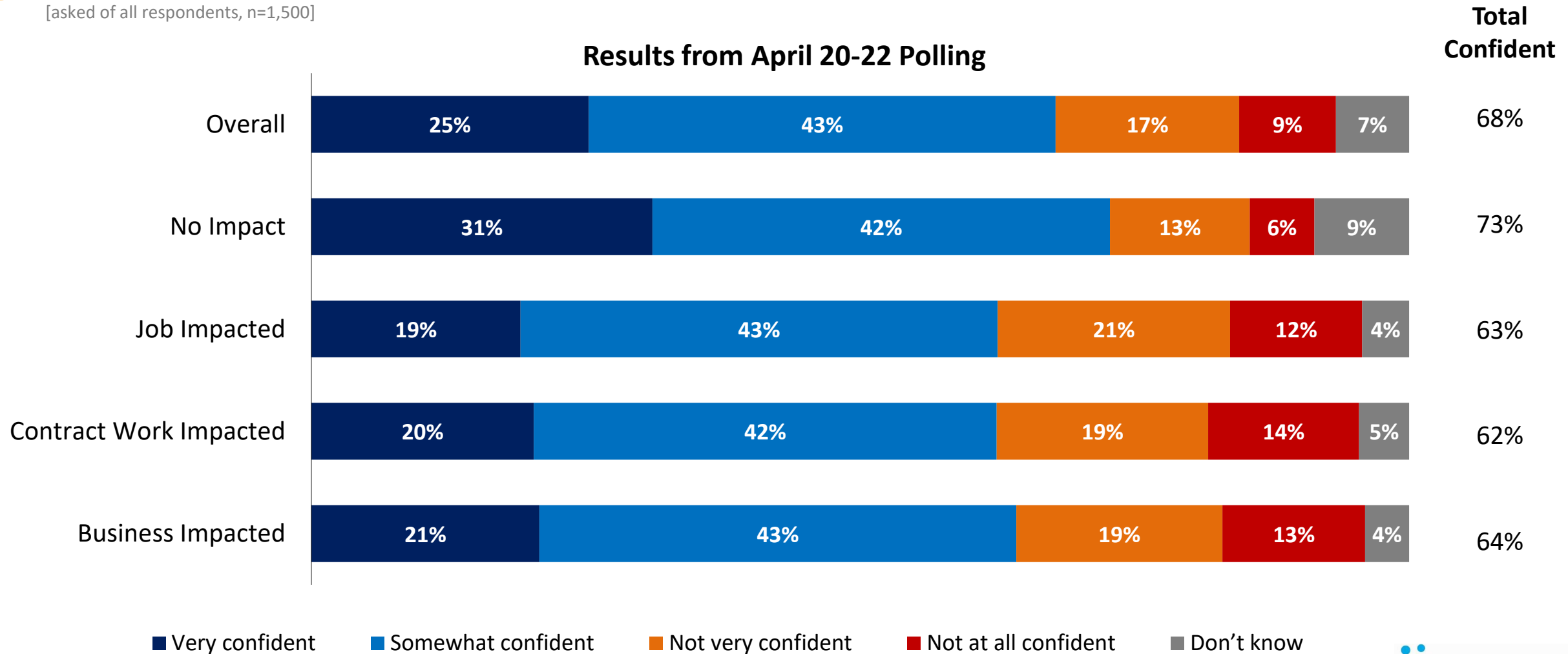
Financial Impacts of Government Programs: The majority of respondents who have felt an impact still feel confident



Taking into account assistance you expect to receive from government programs, as well as your other income and savings, how confident are you that you will be able to meet your household's financial needs during the COVID-19 outbreak? BY Impact

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

Results from April 20-22 Polling



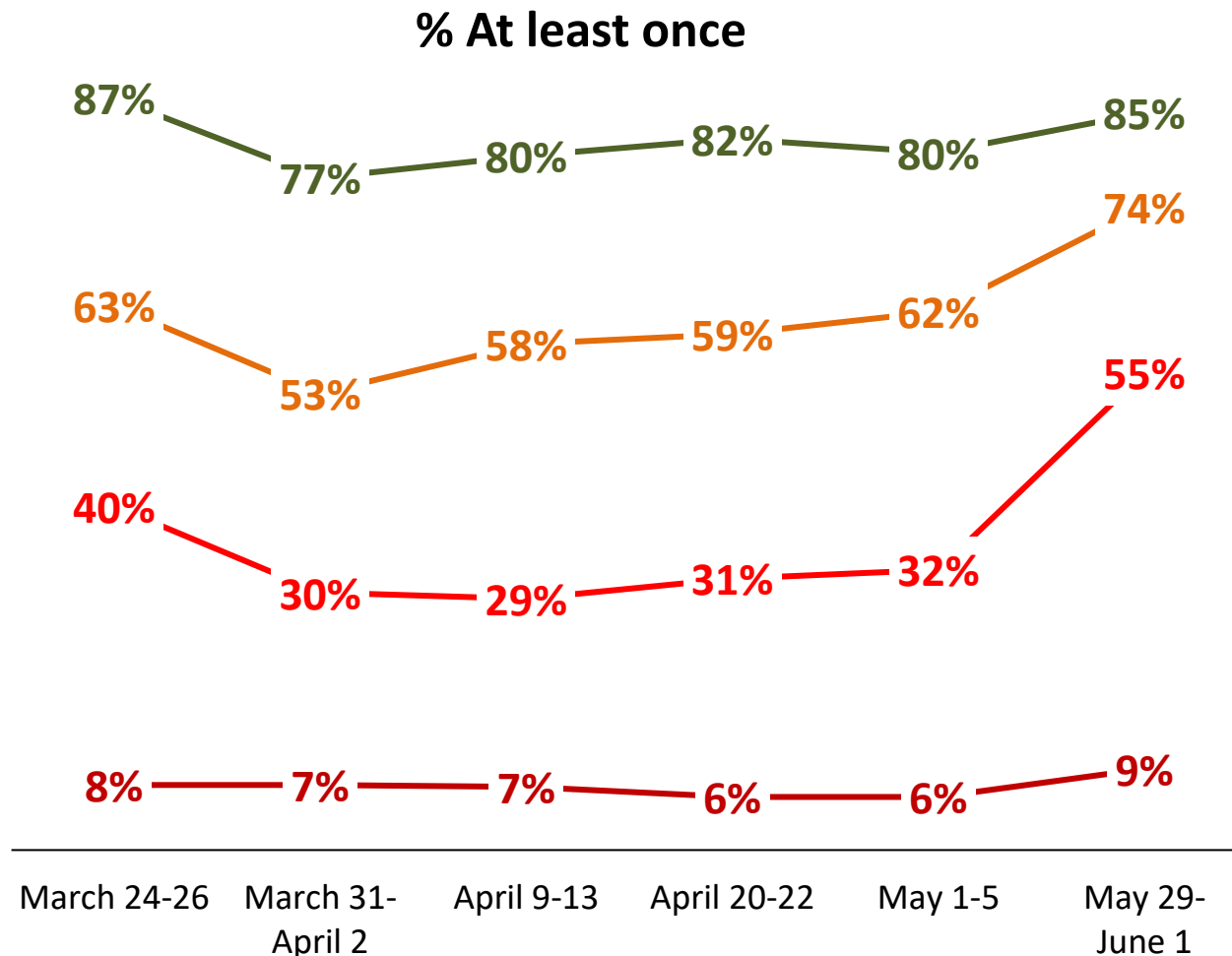
Corona Virus as a Way of Life

Activities: Since early May, those who say they've done a higher risk activity at least once in the last week is up 23-pts to over half (55%)



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

[all respondents, n=1,500]



We asked respondents how many times they have done each behaviour separately and summed their responses into the following risk categories:

Lower risk

- Made a trip to a grocery store or a drug store

Middle risk

- Made a trip to a store other than a grocery store or a drug store
- Met up with a relative or friend outdoors

Higher risk

- Visited a relative or friend in their home
- Hosted a relative or friend in my own home
- Gathered with a small group inside a home
- Met up with a small group outdoors

Large gathering

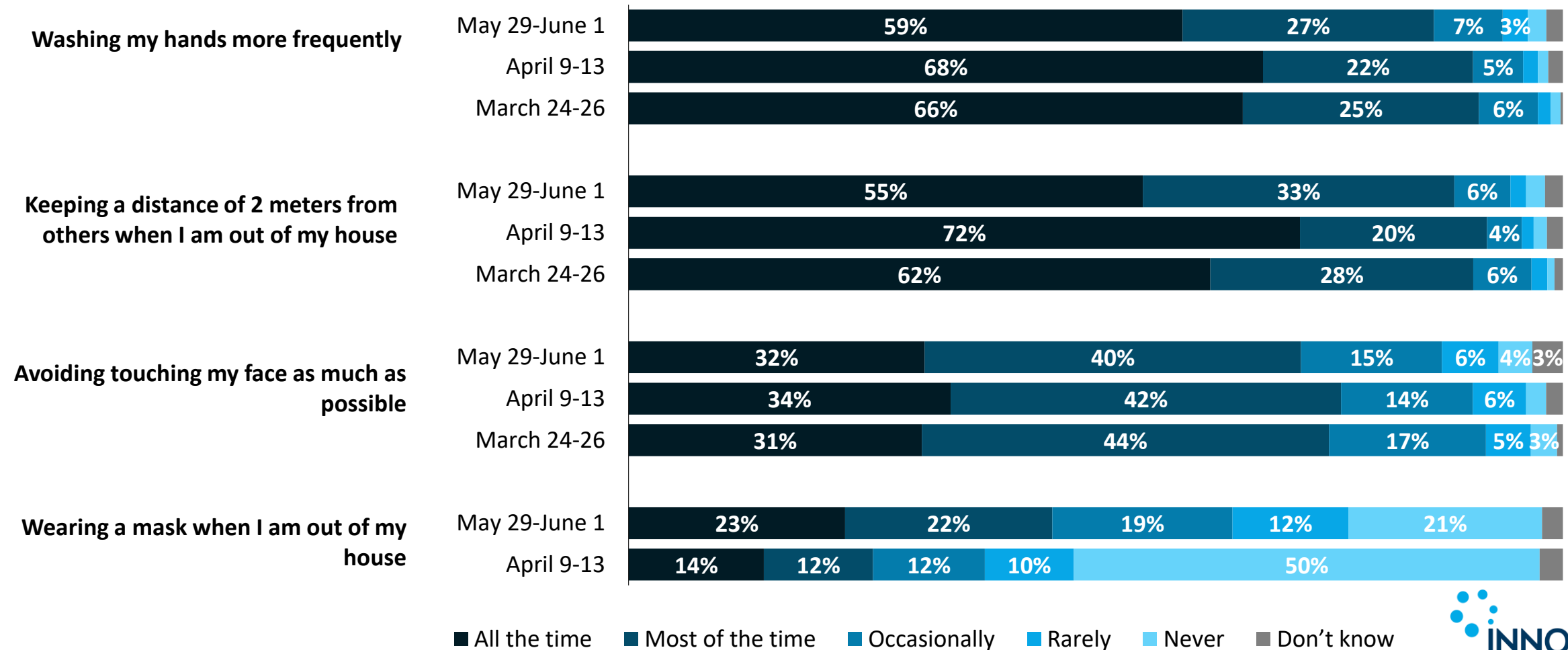
- Attended a large gathering of about 50 people or more

Protective Behaviours: While respondents are becoming more lax on other behaviours, reported mask wearing is up 19-pts since mid-April



And specifically, how often are you doing each of the following things to reduce the chance you will get COVID-19 or pass it to others?

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



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

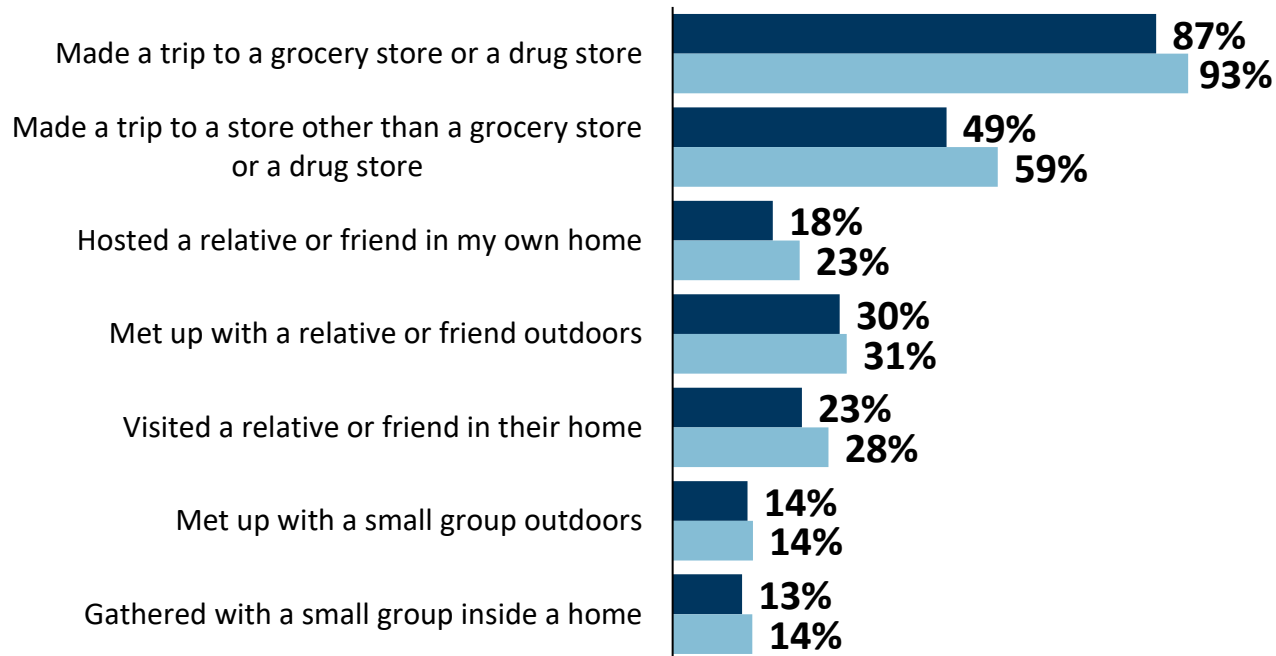
However, those who say they are self-isolating are only leaving the house and gathering with friends slightly less



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]

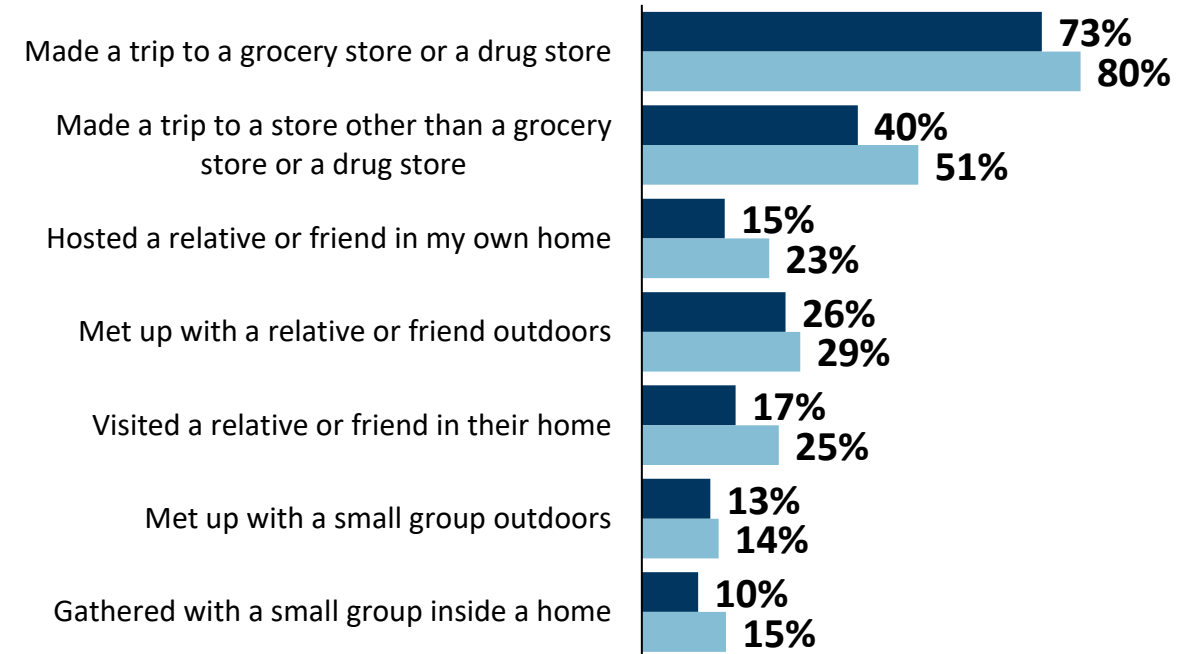
Among individuals who do NOT say that they are self-isolating



■ Mar 31 - Apr 2

■ Mar 23-26

Among individuals who DO say that they are self-isolating



■ Mar 31 - Apr 2

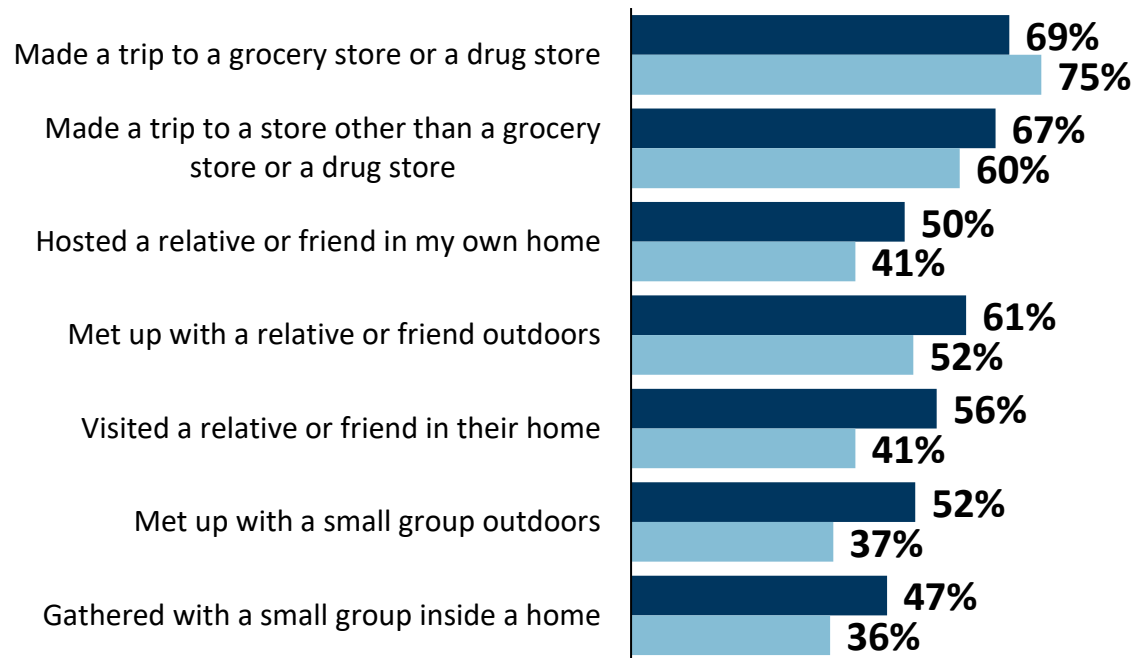
■ Mar 23-26

Physical Distancing by Travel: Households with a returnee only made slightly fewer shopping trips and social visits week-to-week in late March

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 23-26

Among individuals who have travelled out of Canada



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

The Impact of COVID-19 on Industry Reputation

Detailed Results: Nearly half say grocery stores and hospitals have had a very good response to the challenges of the COVID-19 crisis

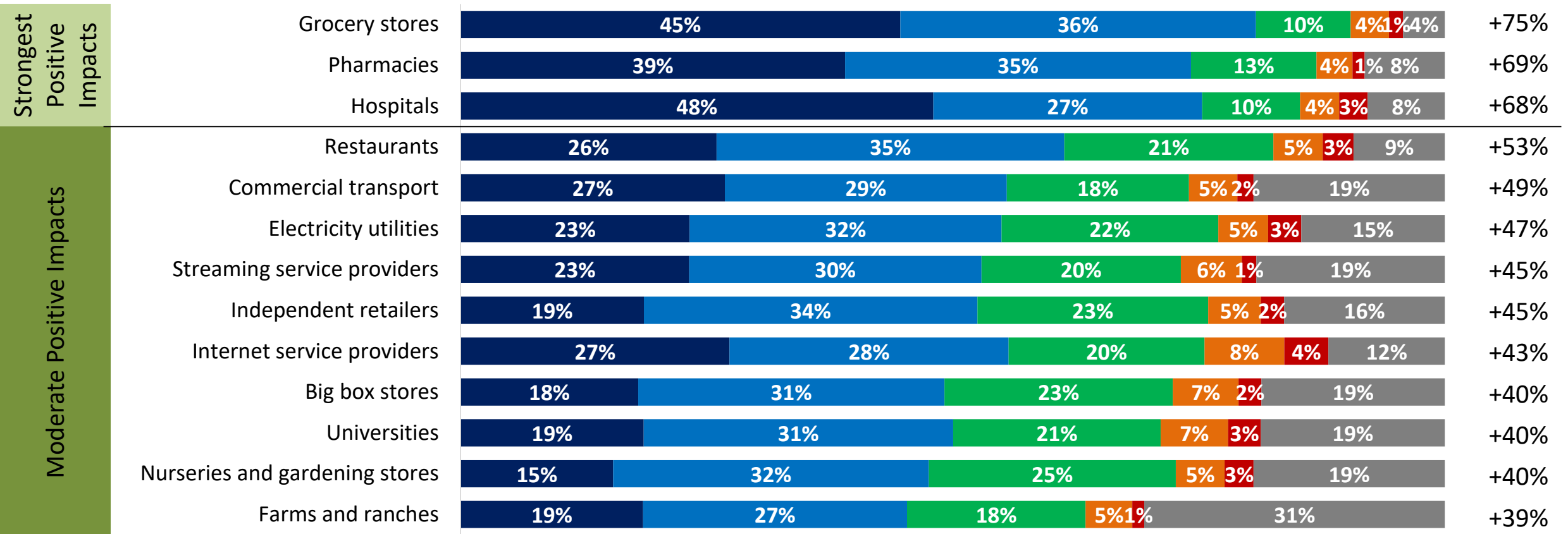


Based on what you have read, seen, or heard, would you say each of the sectors below has done a good job or a poor job of responding to the challenges of the COVID-19 crisis?

[asked of all respondents, Total n=1,500; split sample each industry is asked of half of the sample at random]

Results from May 15-20 Polling

Net Good



■ Very good
 ■ Somewhat good
 ■ Neither good nor poor
 ■ Somewhat poor
 ■ Very poor
 ■ Don't know

Detailed Results: Half say nursing/long-term care homes have had a poor response to the challenges of the COVID-19 crisis



Based on what you have read, seen, or heard, would you say each of the sectors below has done a good job or a poor job of responding to the challenges of the COVID-19 crisis?

[asked of all respondents, Total n=1,500; split sample each industry is asked of half of the sample at random]

Results from May 15-20 Polling

Net Good

Moderate Positive
Impacts

Banks

18% 33% 23% 8% 5% 12%

+39%

K-12 schools

22% 28% 22% 8% 3% 17%

+38%

Colleges & CEGEPs

17% 29% 23% 6% 3% 23%

+38%

Manufacturing

14% 30% 23% 6% 3% 25%

+35%

Construction

14% 31% 24% 8% 3% 21%

+33%

Public Transit

16% 29% 24% 9% 3% 20%

+33%

Cell/mobile phone service providers

17% 24% 24% 10% 5% 20%

+26%

Risking
Reputation
Damage

Airlines

9% 25% 25% 15% 9% 18%

+10%

Residential landlords

6% 21% 24% 14% 6% 29%

+7%

Insurance

10% 18% 24% 12% 9% 26%

+6%

Suffering
Reputation
Damage

Meat packaging plants

9% 20% 17% 22% 16% 16%

-10%

Retirement homes*

10% 18% 15% 19% 25% 14%

-15%

Nursing or long-term care homes*

11% 16% 14% 19% 31% 10%

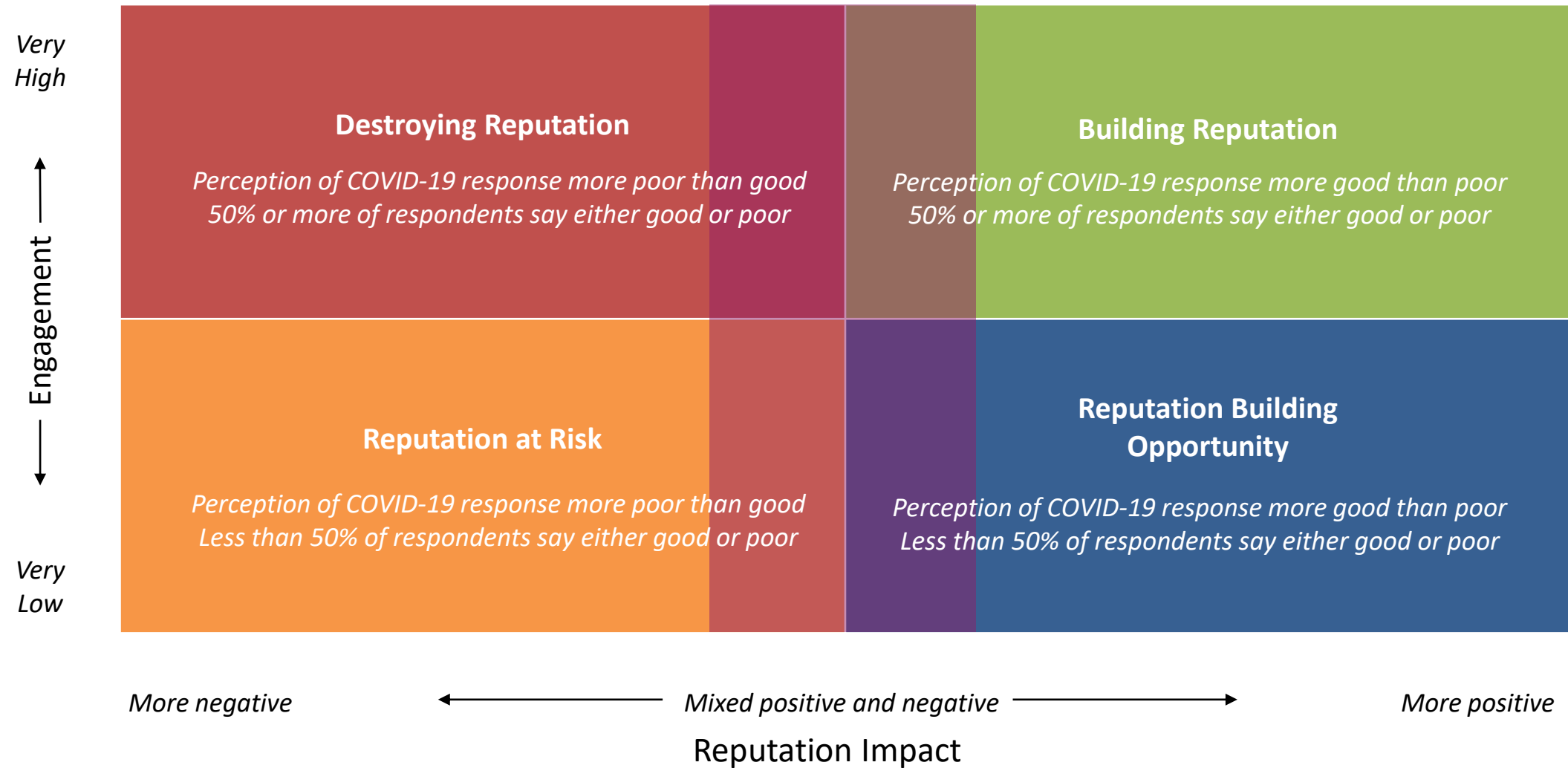
-23%

■ Very good ■ Somewhat good ■ Neither good nor poor ■ Somewhat poor ■ Very poor ■ Don't know

*Note: In order to clarify the difference, the fuller descriptions given for retirement and long-term care homes are "Nursing or long-term care homes for seniors in need of active day-to-day assistance/care" and "Retirement homes for more independent/healthy seniors who need limited/moderate assistance".

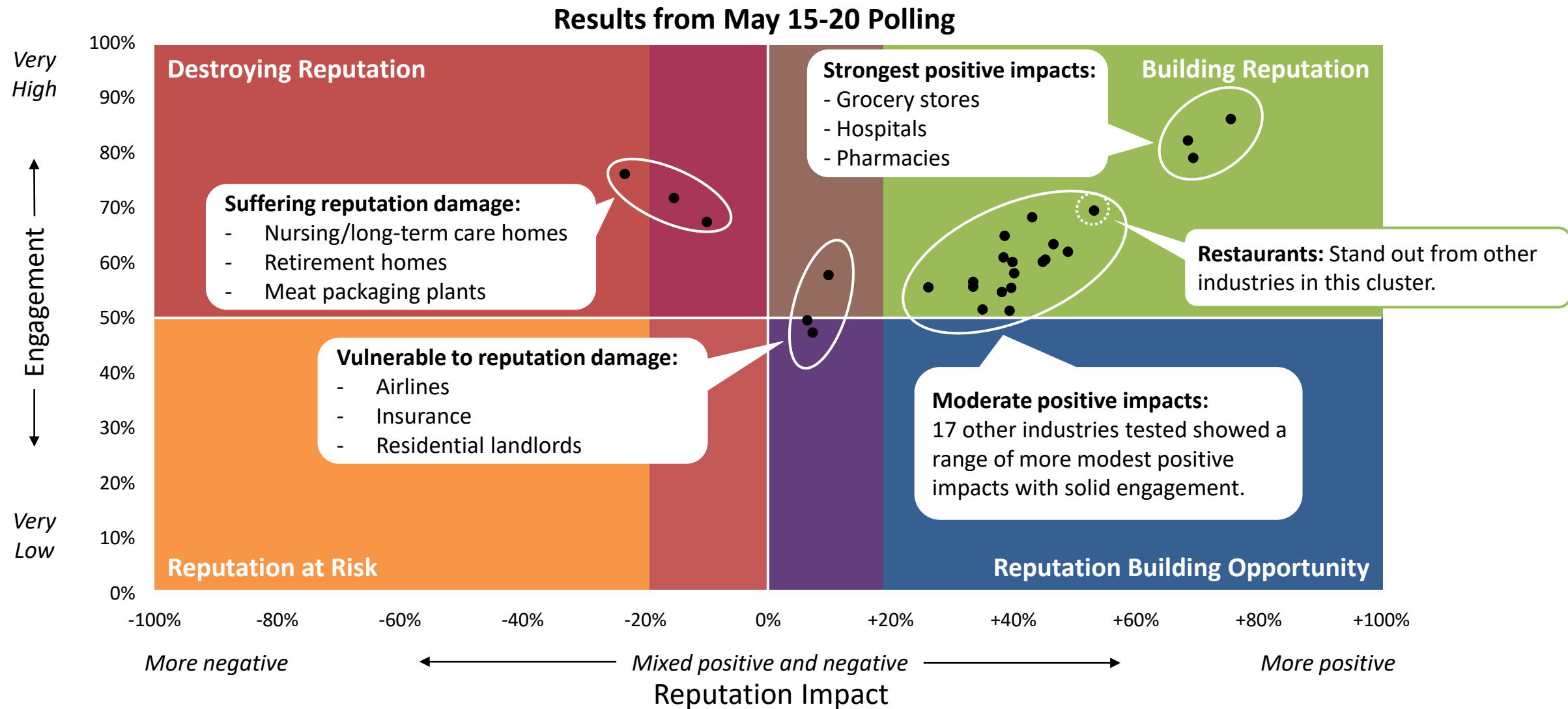
Measuring Reputational Impact

When we measure the public’s perception of industry response to the COVID-19 outbreak, we find that for some industries more people have an opinion – whether positive or negative – than other industries. We call this **engagement**. When we compare this to the **reputation impact** we see the potential for industries to build reputation or put their reputation at risk.



Reputational impacts: Grocery stores, hospitals and restaurants are building on a positive reputation with their response to COVID-19

Three of the industries tested are seeing clear negative impacts with high engagement and net negative impact scores from Canadians. On the other hand, grocery stores, hospitals, pharmacies, and to a lesser extent restaurants are seeing high engagement with very positive reputation impacts.



The Policy Playing Field

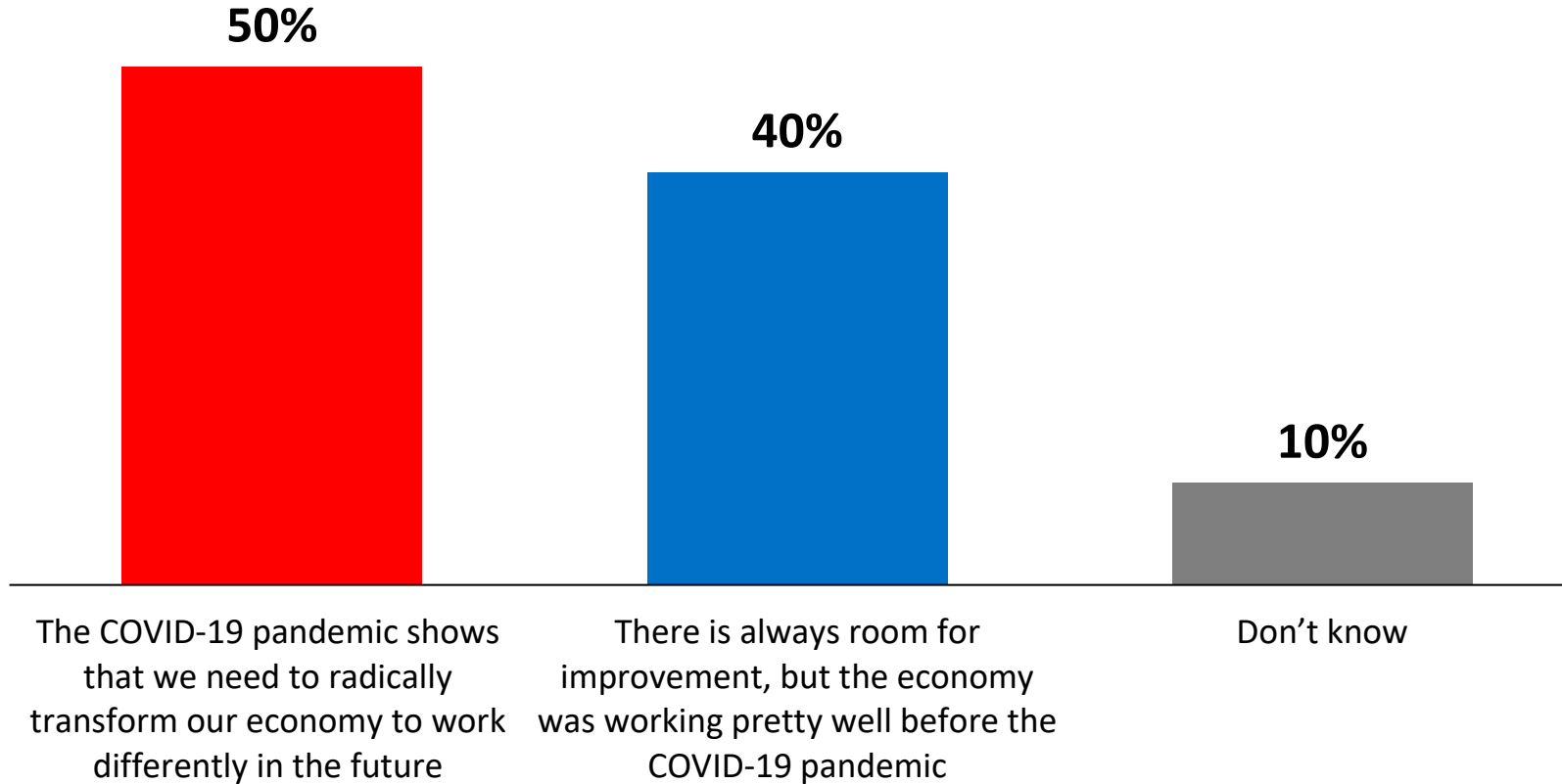
Transform Economy: Half of Canadians believe we need to radically transform our economy; highest amongst women and NDP partisans



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]

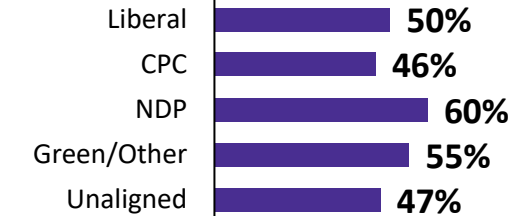
Results from May 29 – June 1 Polling



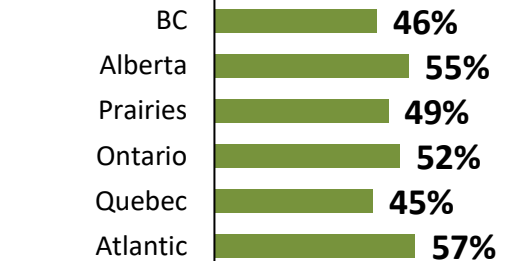
Segmentation

Those who say 'Radically transform'

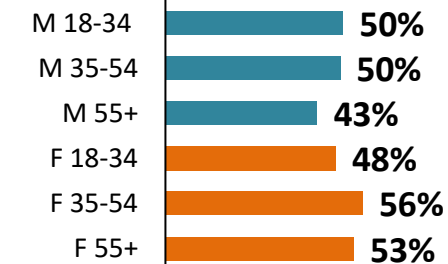
Party ID



Region



Age-Gender



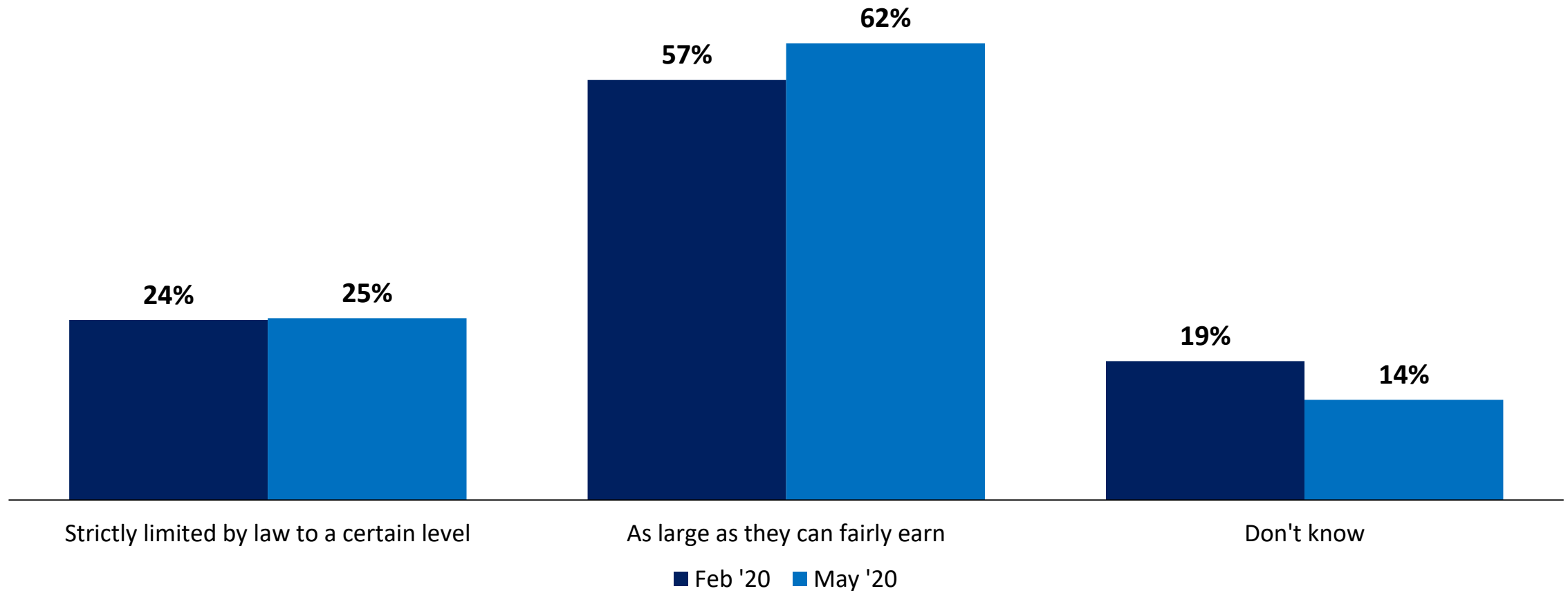
47%

53%

Profit Size: 6-in-10 (62%) say that profits should be as large as they can fairly earn, up 5-pts since February



The profits a company or business can earn should be...
[asked of all respondents; n=1,500]

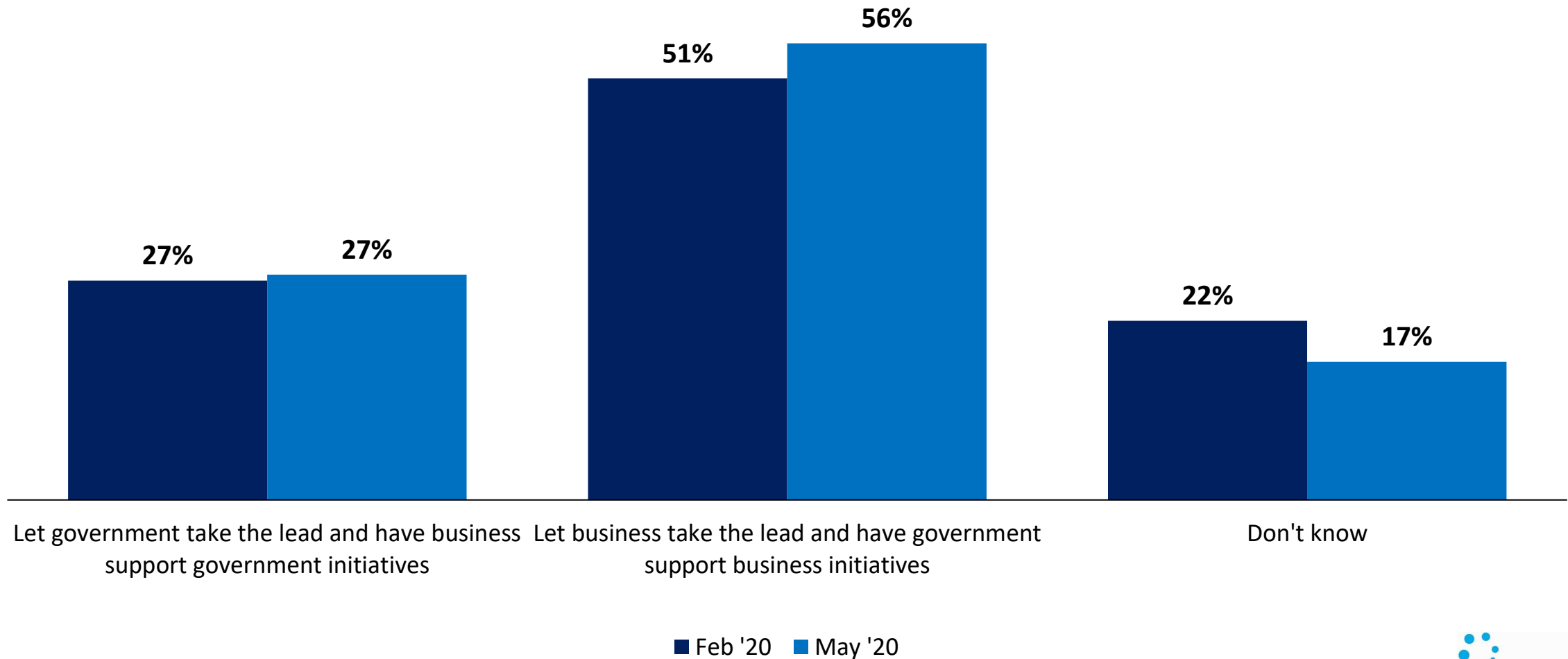


Economic Growth: Majority (56%) say we should let businesses take the lead, an increase of five points since February



When it comes to economic growth, should we...

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

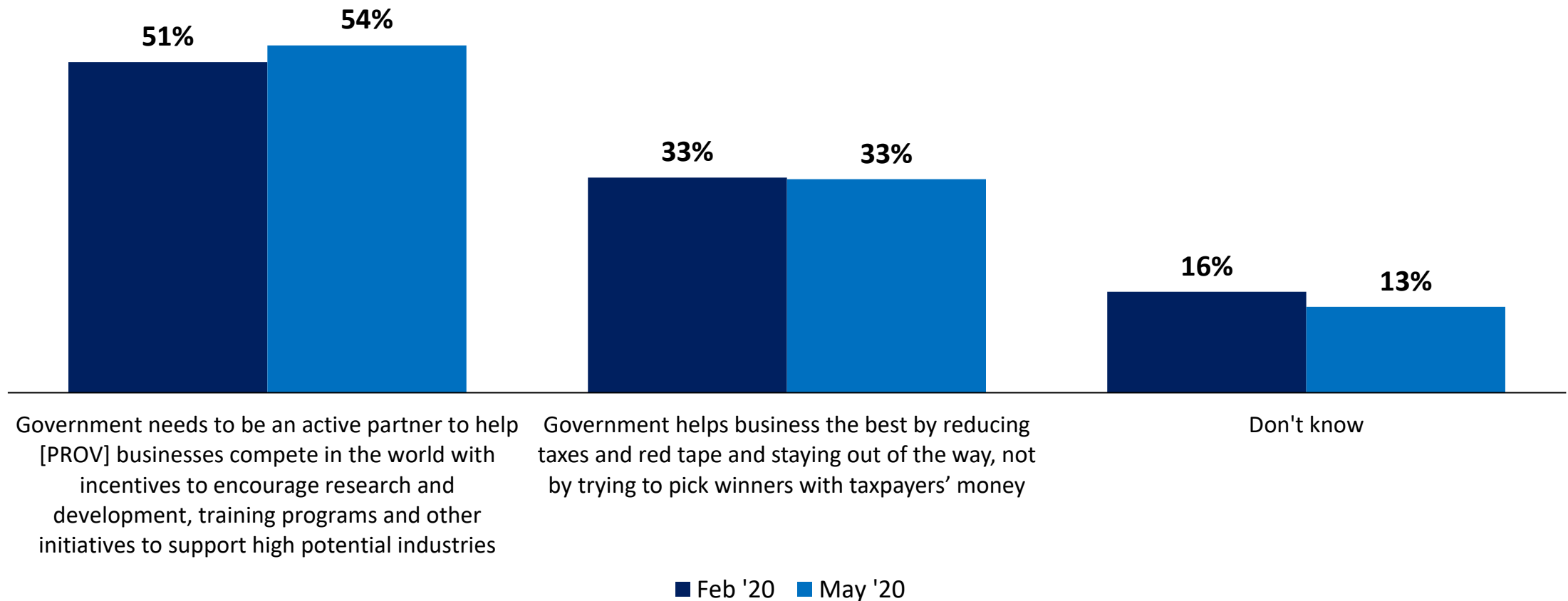


Role of Provincial Govt: Majority (54%) say provincial gov't should be an active partner to help businesses, up directionally since February



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=1,500]

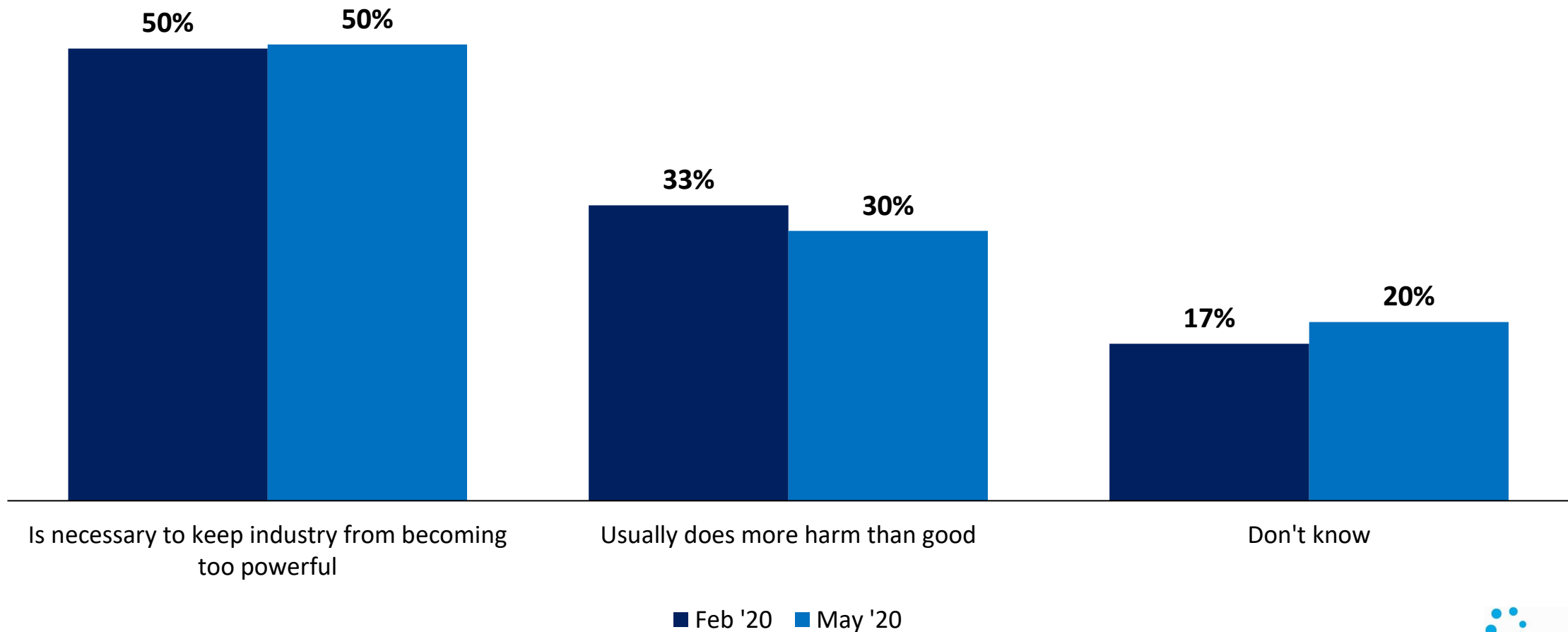


Govt Regulation: Half (50%) say government regulation of business is necessary, 3-in-10 (30%) say it does more harm than good



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

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

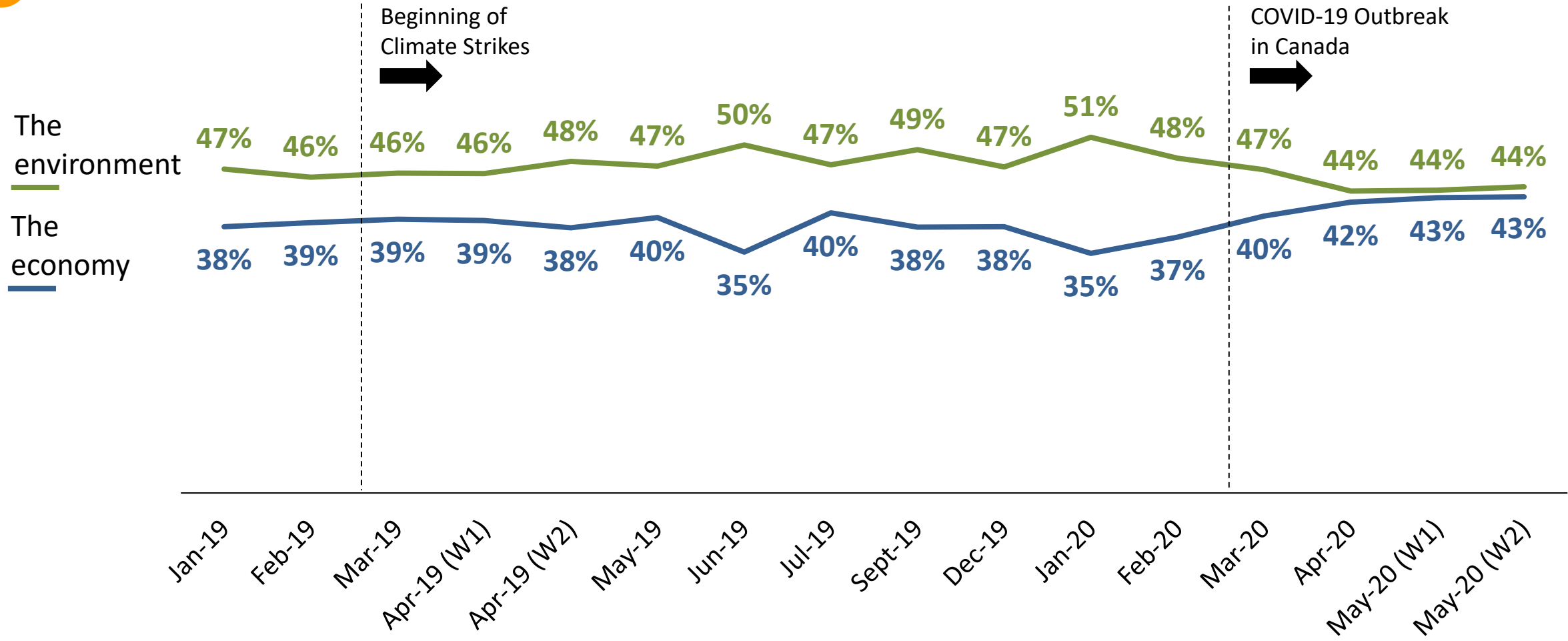


More said the environment was more important than the economy last year. But the gap has narrowed in the last few months.



When it comes to trade-offs between the economy and the environment, which is more important to you:

[asked of all respondents]



Energy Transition: Majorities support pro-oil statements, pro-transition statements enjoy less support

To fully understand Canadians' attitudes towards oil/gas developments, we ask respondents to react to a series of agree and disagree statements on energy transition from a wide range of perspectives.

Based on their responses, we would then group respondents who share similar attitudes into groups for further analysis.



Do you agree or disagree with the following statements?

[asked of all respondents]

Results from May 15-20 Polling

Agree

Support Oil/Gas Developments

It is critical to Canada's ongoing prosperity that we responsibly develop and export our oil and gas resources

It makes no sense to leave Canada's oil and gas in the ground because if Canada doesn't meet the global demand, another country will

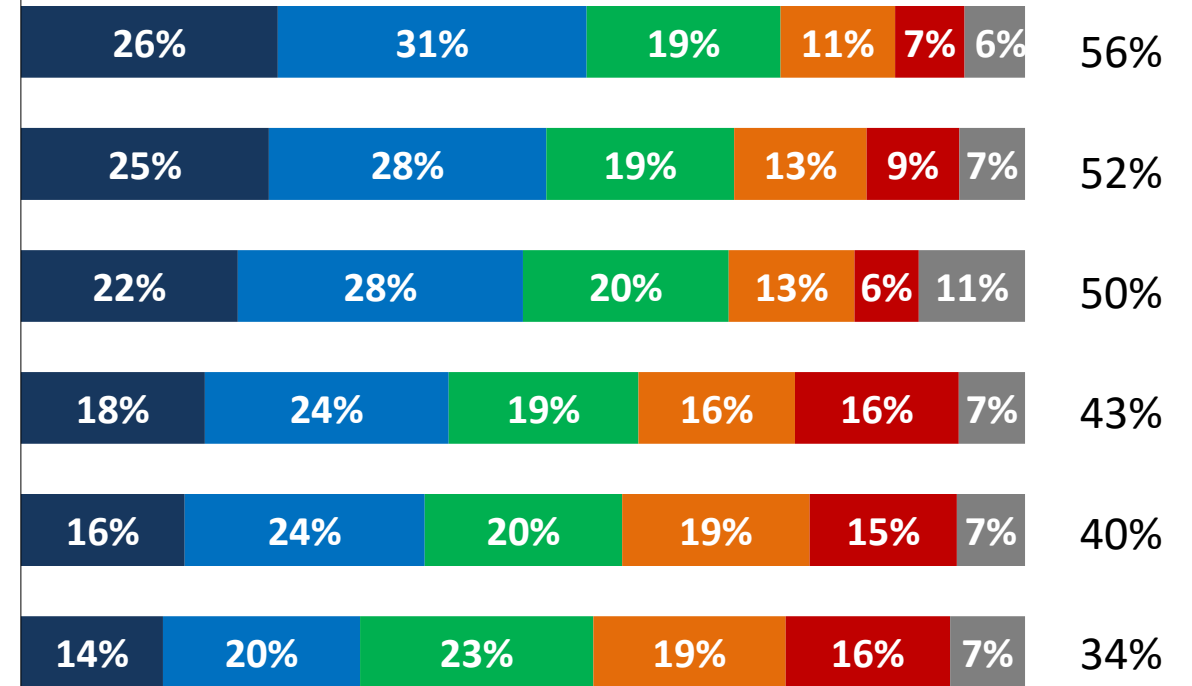
Canada is one of the most responsible countries in the world when it comes to how we develop and export our oil and gas resources

Move Away from Oil/Gas Developments

The world is facing a climate emergency and it is irresponsible of Canada to add to the problem by developing new oil and gas projects

Fossil fuels should be phased out as quickly as possible to speed up the shift to a lower-carbon future even if it means job losses or paying more for energy

Because of the low price of oil, it doesn't make any sense to continue investing in oil and gas in Canada



Strongly agree

Somewhat agree

Neither agree nor disagree

Somewhat disagree

Strongly disagree

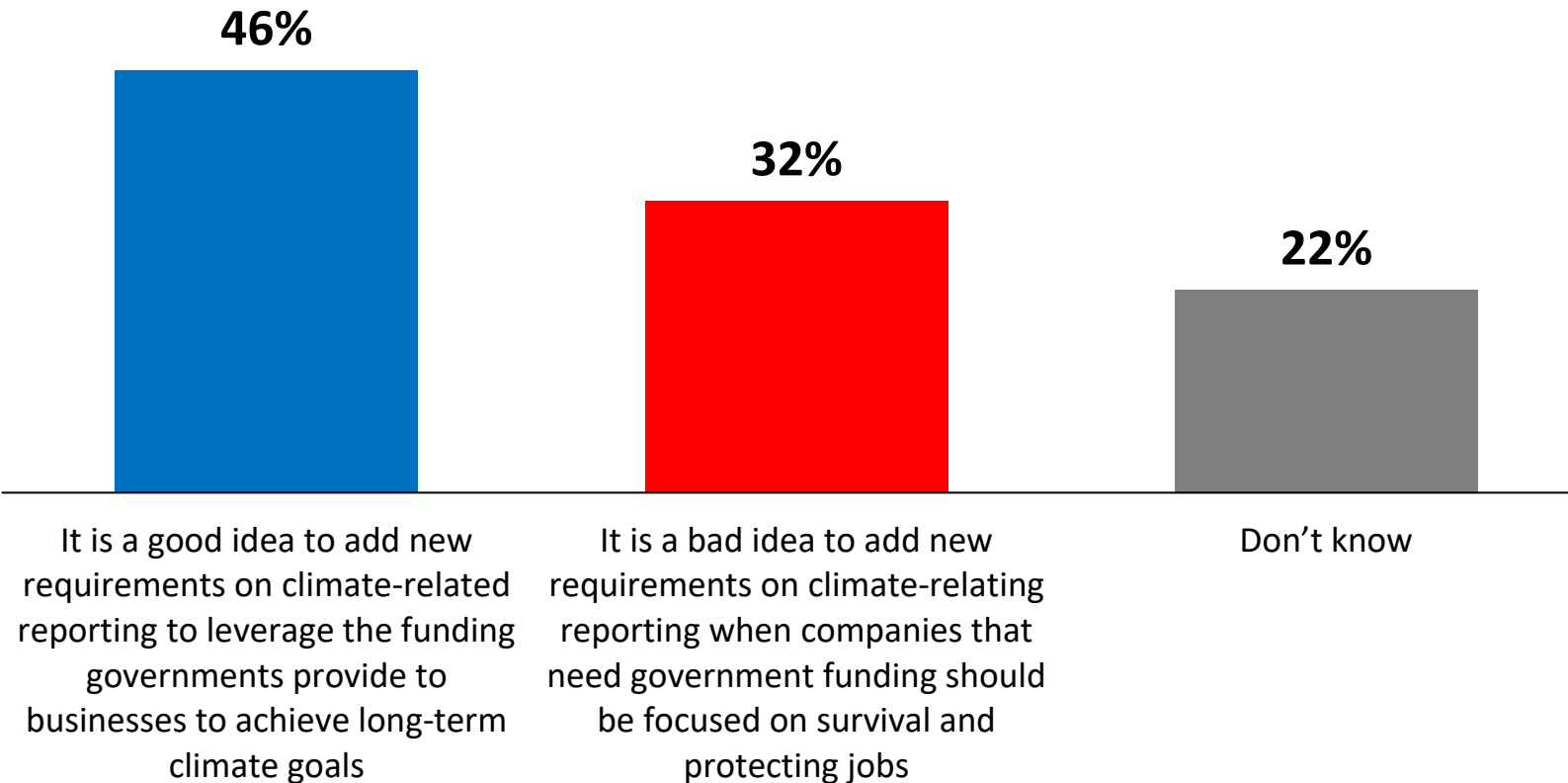
Don't know

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



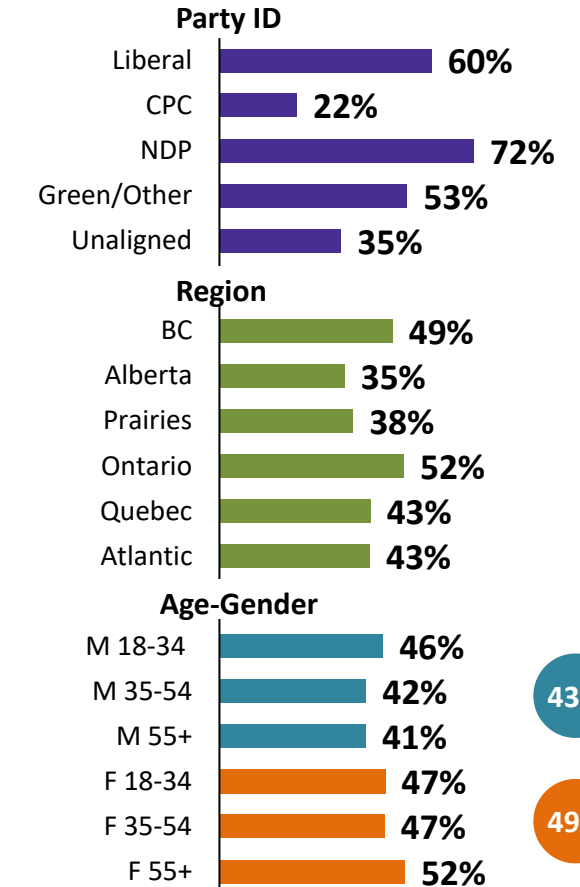
Thinking about the LEEFF program, which of the following comes closest to your point of view?
[asked of all respondents; n=1,500]

Results from May 29 – June 1 Polling



Segmentation

Those who say 'It is a good idea'

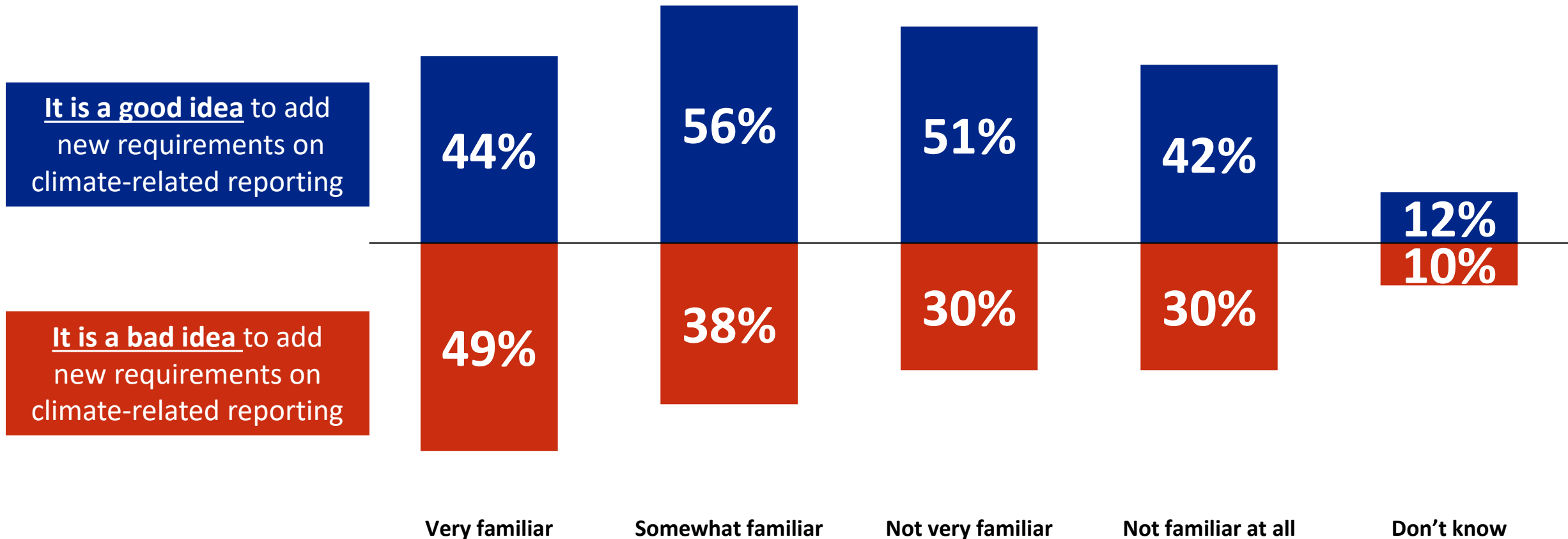


LEEFF Opinion by Familiarity: Those very familiar with the proposals are slightly opposed; remainder believe it is a good idea



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]

Results from May 29 – June 1 Polling



Note: 'Don't know' not shown.

Populism: Canadians shift from agreeing that too often government listens to experts towards agreeing that government should listen to experts



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

Too often the government listens to experts instead of common sense OR

Provincial issues are complicated so government should listen to experts when it comes to policy

[asked of all respondents; n=1500]

Use Common Sense 47%
Listen to Experts 38%



Feb 6-11

Use Common Sense 40%
Listen to Experts 48%



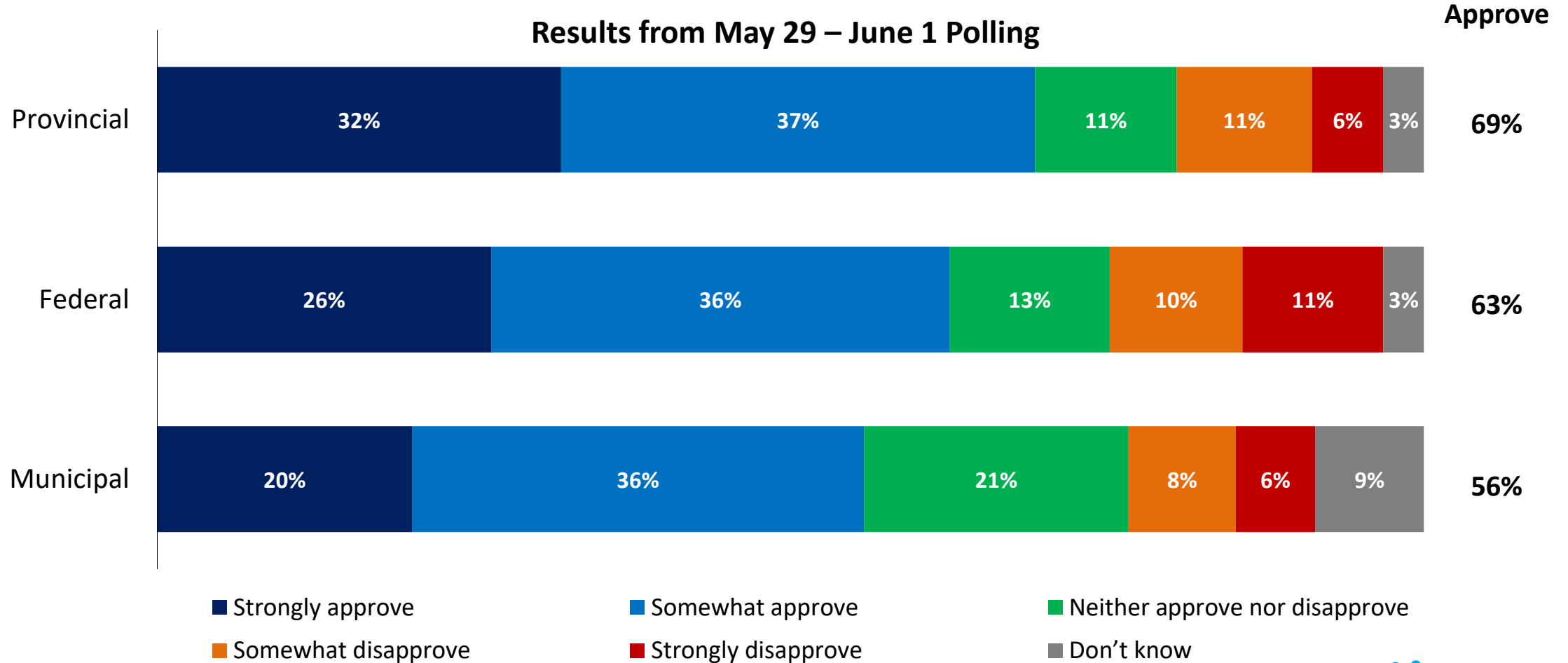
May 15-20

Rally 'Round the Flag

Government Handling of COVID-19: Approval of the provincial government's handling is highest (69%) followed by federal (63%)

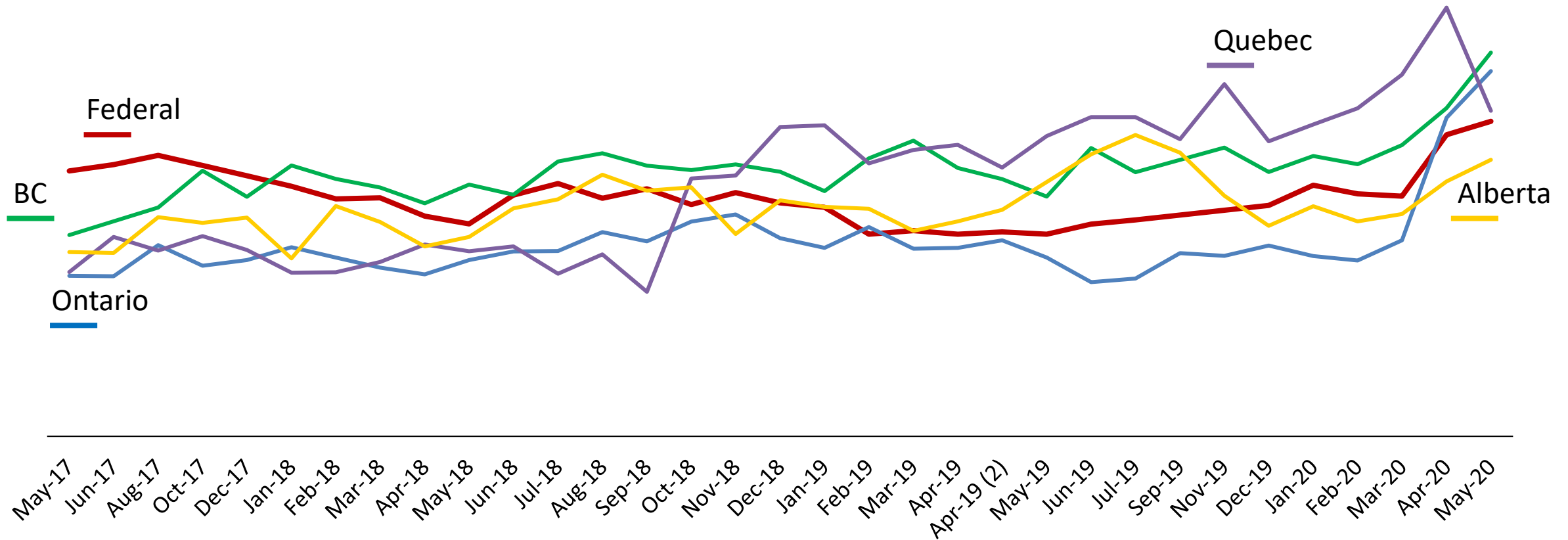


Do you approve or disapprove of the way the [PROV/federal/your local municipal] Government has handled the outbreak of COVID-19?
[asked of all respondents; n=1,500]



The federal government and four largest provinces all have seen jumps³² in satisfaction since January, though Quebec is down from March

% **satisfied** with government performance: Federal, Ontario, Quebec, BC, and Alberta
[asked of all respondents; n=1500]

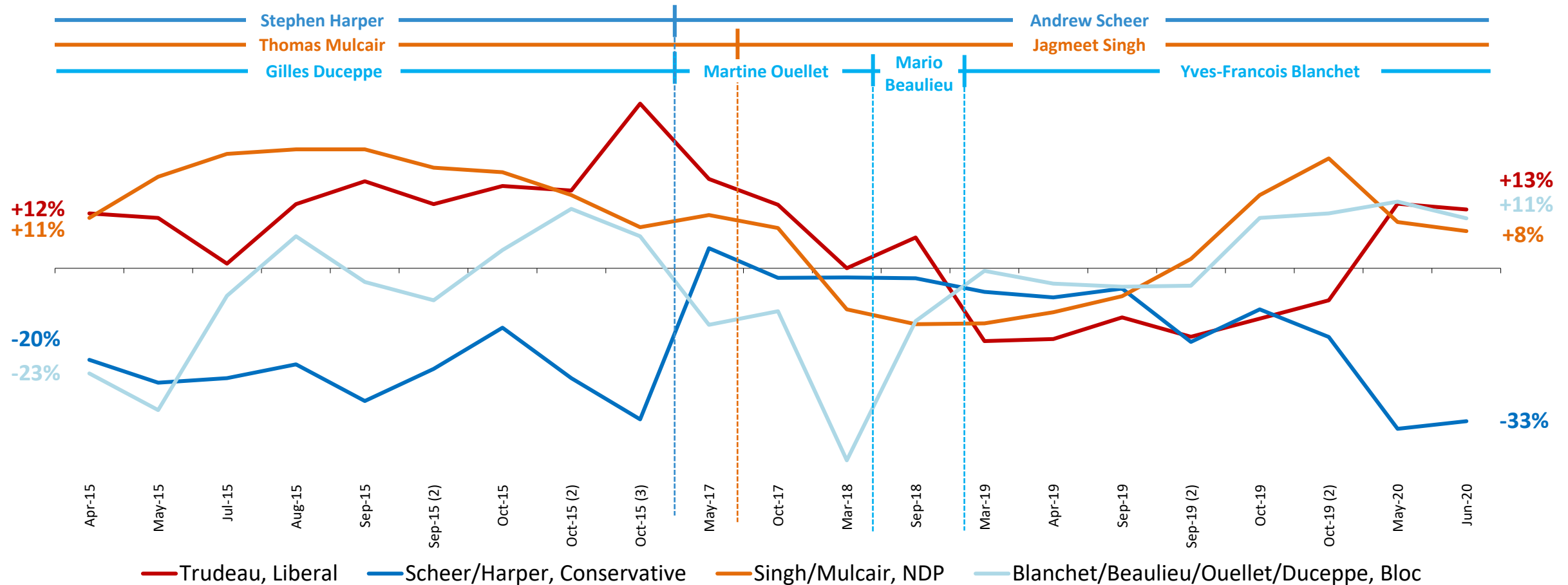


Federal Party Leader NET Favourables Tracking: Net favourability of party leaders is steady with Trudeau seen most favourably (+13% net)



Now we are going to provide you with several names of public figures. Please indicate whether you have heard of that person and, if so, whether you have a favourable or unfavourable impression of that person. If you do not recognize the name, just indicate that.

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



Note: Green Leader, People's Party Leader not shown.

Current data: June 2020

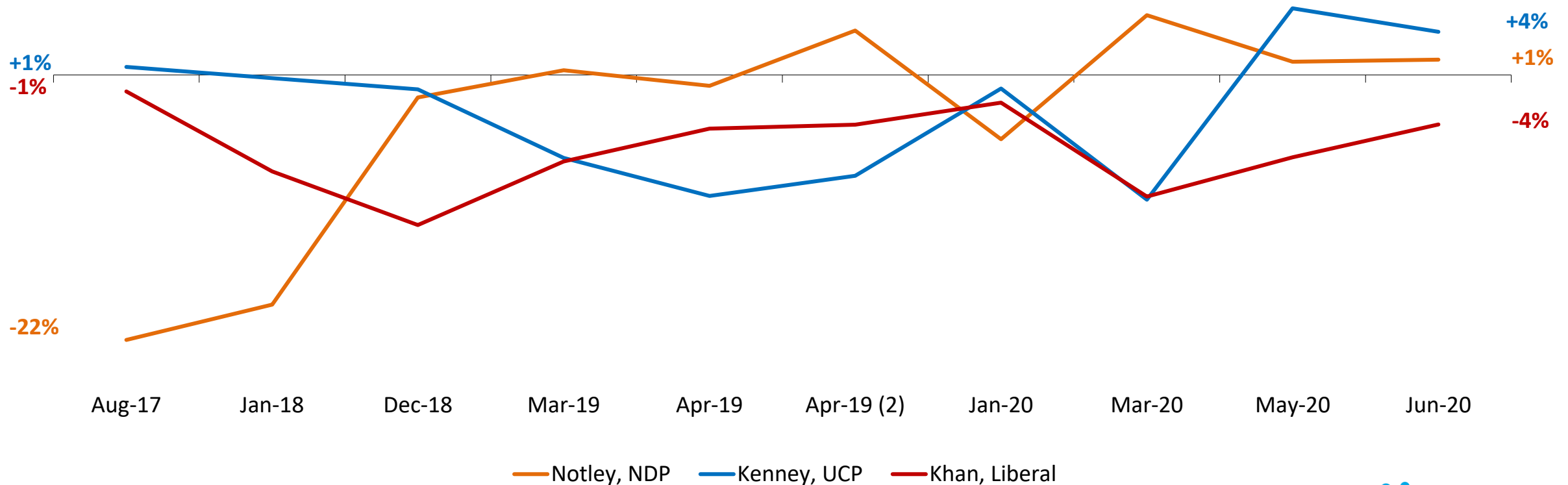
Note: Results for Yves-Francois Blanchet for Quebec respondents only

Alberta Party Leader NET Favourables Tracking: Net favourability of Khan up from March and May, though still negative



Below are the names of several individuals who have been mentioned in the news recently. For each one, please indicate whether you have heard of that person and, if so, whether you have a very favourable, somewhat favourable, neither favourable or unfavourable, somewhat unfavourable or very unfavourable impression of that person. If you do not recognize the name, just indicate that.

[asked of all respondents; n=300]

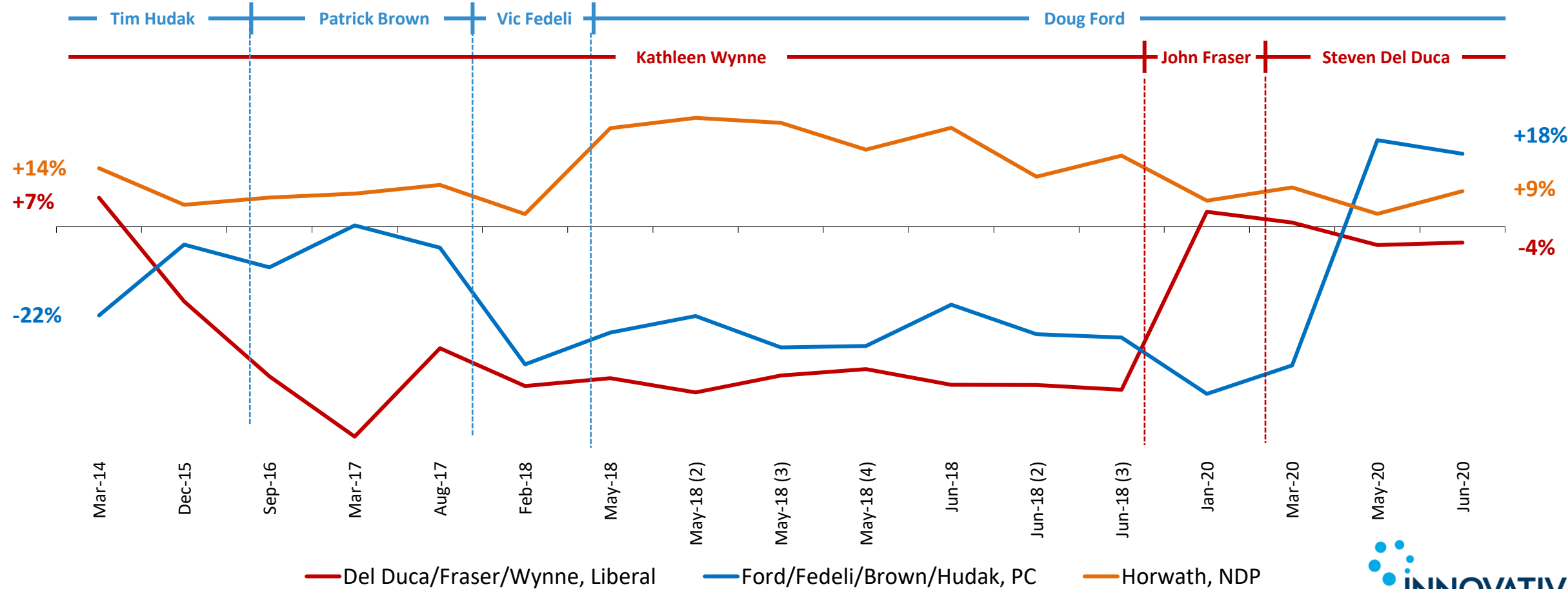


Ontario Party Leader NET Favourables Tracking: Ford holds highest net favourability among the three parties since May 2020



Below are the names of several individuals who have been mentioned in the news recently. For each one, please indicate whether you have heard of that person and, if so, whether you have a very favourable, somewhat favourable, neither favourable or unfavourable, somewhat unfavourable or very unfavourable impression of that person. If you do not recognize the name, just indicate that.

[asked of all respondents; n=600]

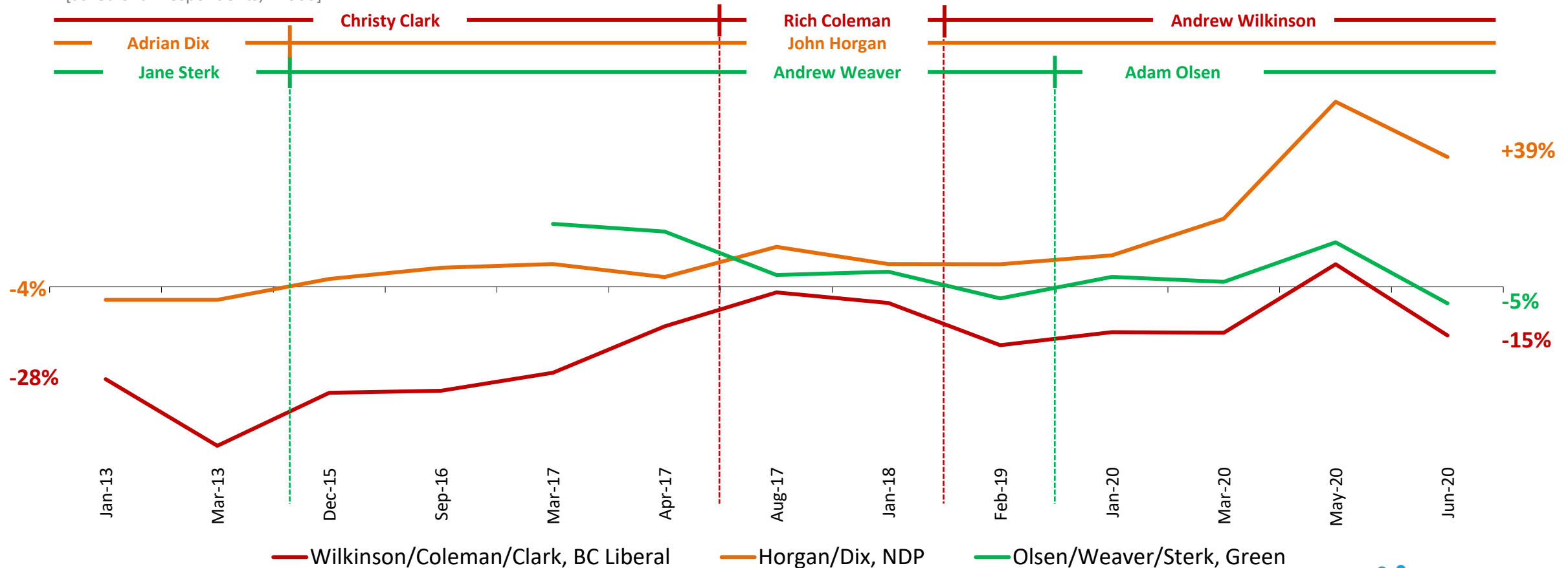


BC Party Leader NET Favourables Tracking: Net favourability has dropped for all three party leaders since May, Horgan remains far ahead

Q

Below are the names of several individuals who have been mentioned in the news recently. For each one, please indicate whether you have heard of that person and, if so, whether you have a very favourable, somewhat favourable, neither favourable or unfavourable, somewhat unfavourable or very unfavourable impression of that person. If you do not recognize the name, just indicate that.

[asked of all respondents; n=300]

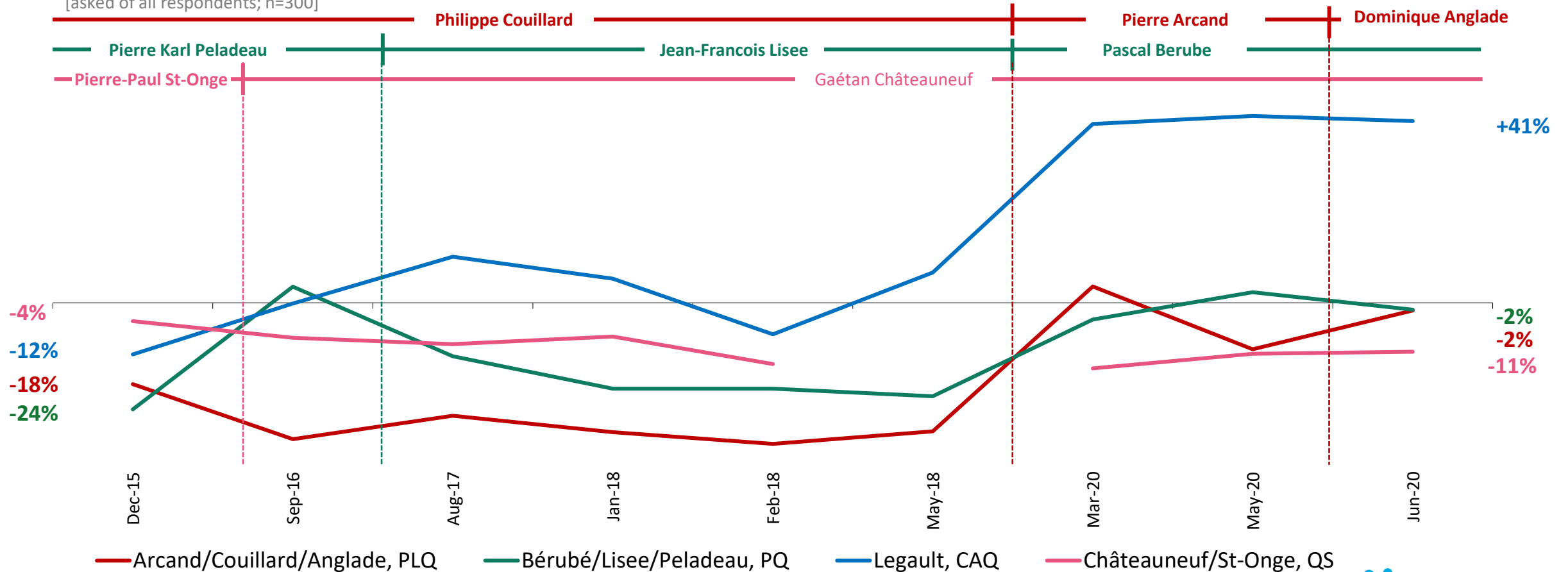


Quebec Party Leader NET Favourables Tracking: New party leader, Anglade, boosts net favourability by 8 points for the liberal party

Q

Below are the names of several individuals who have been mentioned in the news recently. For each one, please indicate whether you have heard of that person and, if so, whether you have a very favourable, somewhat favourable, neither favourable or unfavourable, somewhat unfavourable or very unfavourable impression of that person. If you do not recognize the name, just indicate that.

[asked of all respondents; n=300]



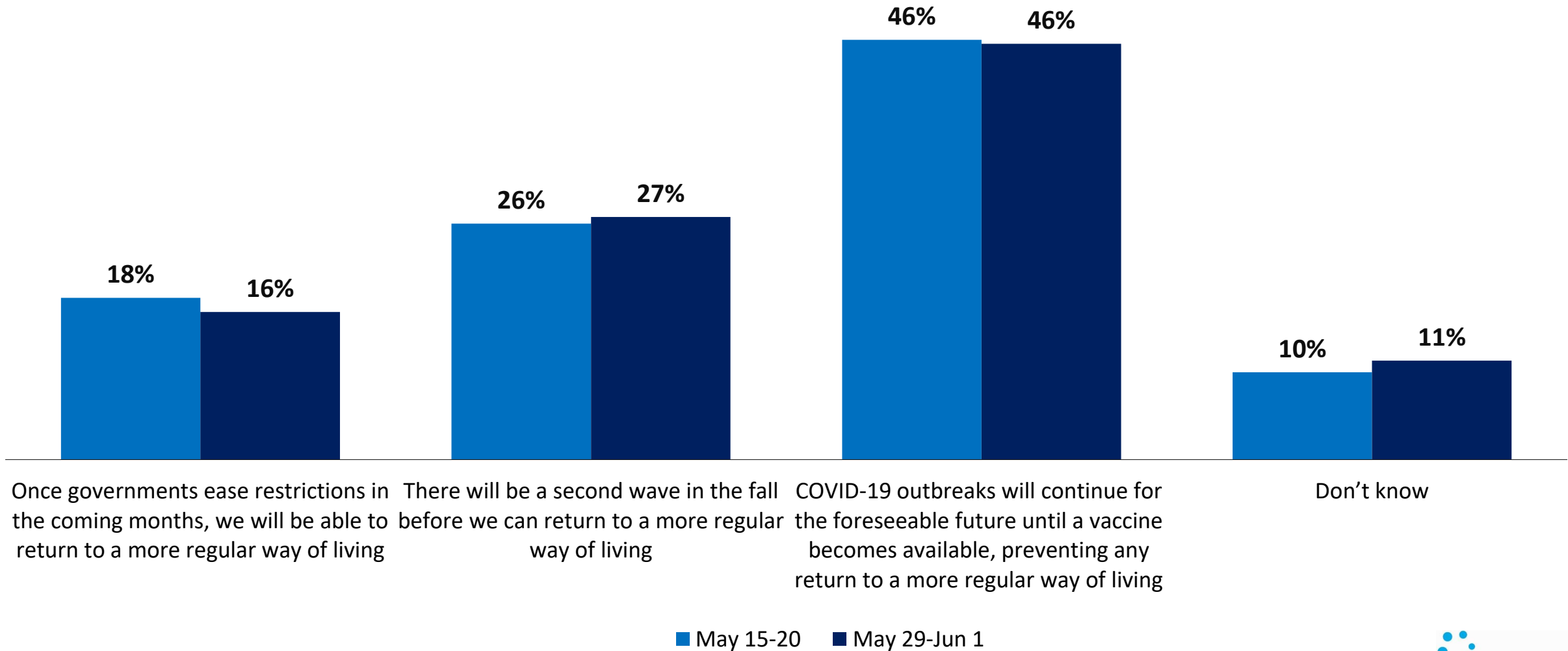
What's Next?

Re-opening: Beliefs around when things will return to normal are steady; most (46%) say outbreaks will continue until vaccine available



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

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

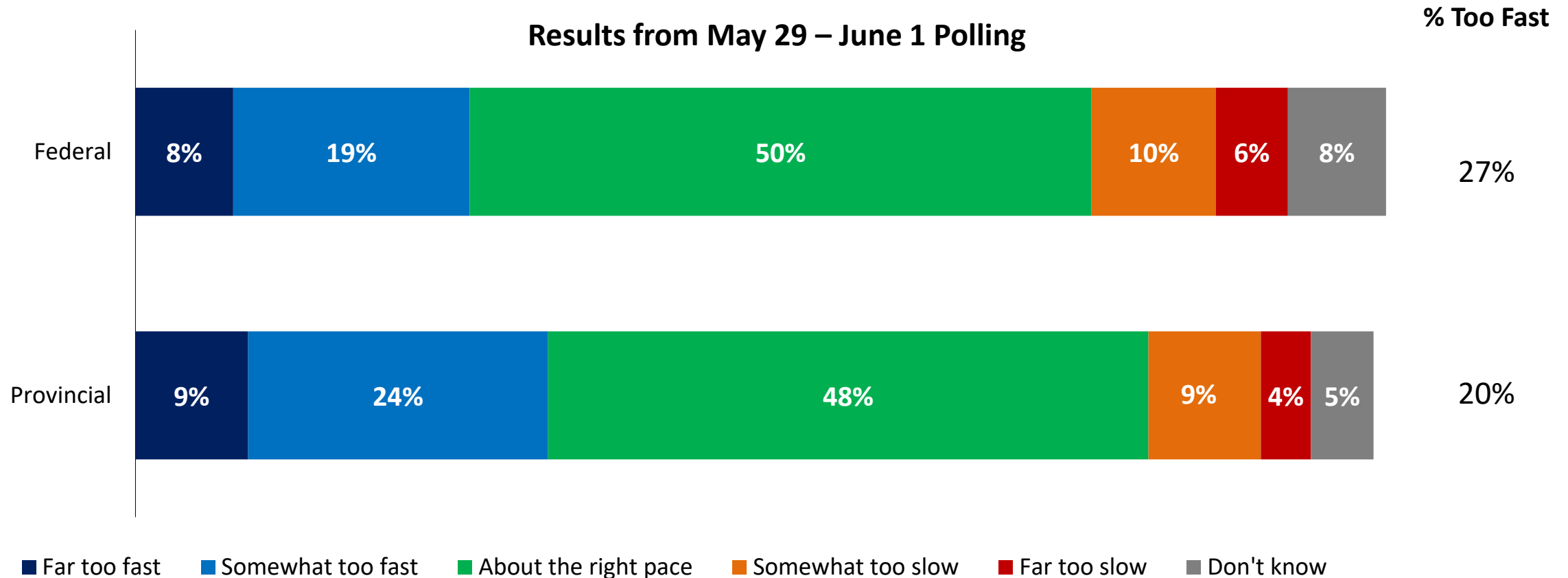


Easing Restrictions: Most feel that both the federal gov't and their provincial gov't have gone at about the right pace



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

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



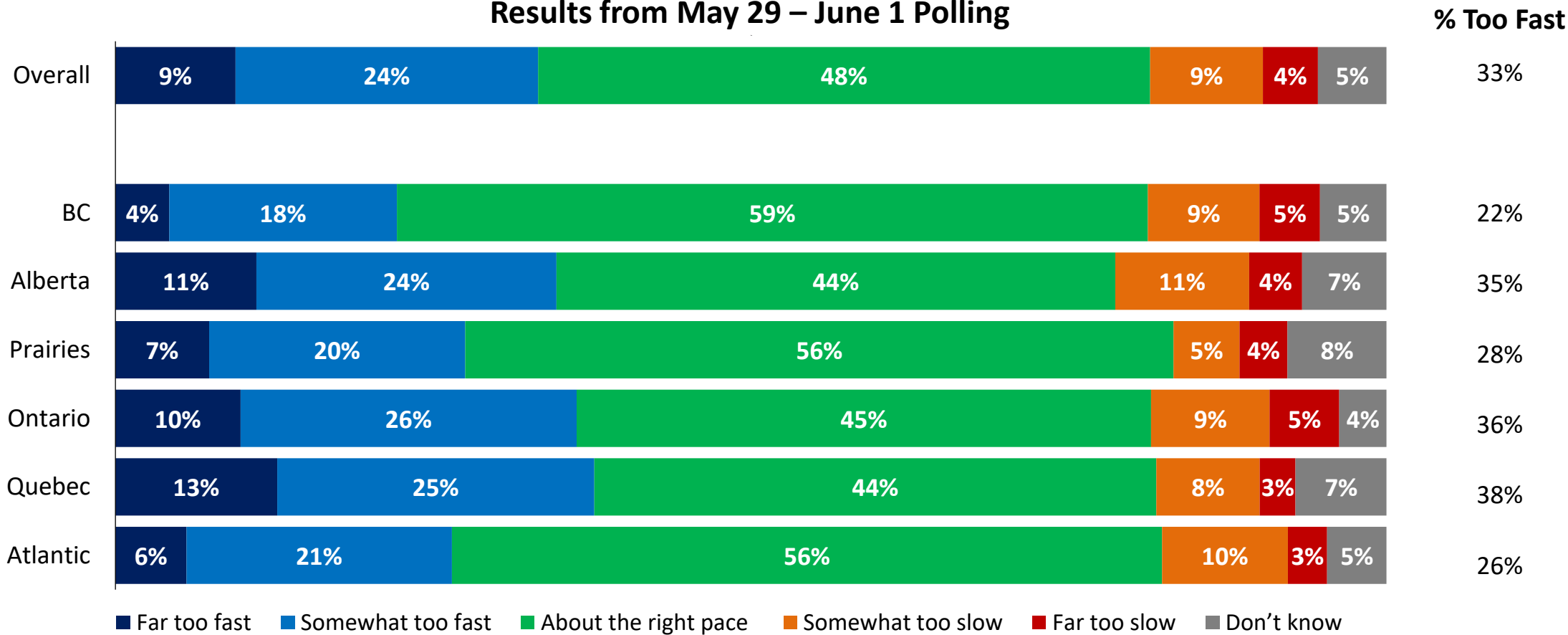
Easing Restrictions, Provincial: Those in AB, ON, and QC are more likely⁴¹ to say their provincial governments are easing restrictions too fast



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=1,500]

Results from May 29 – June 1 Polling



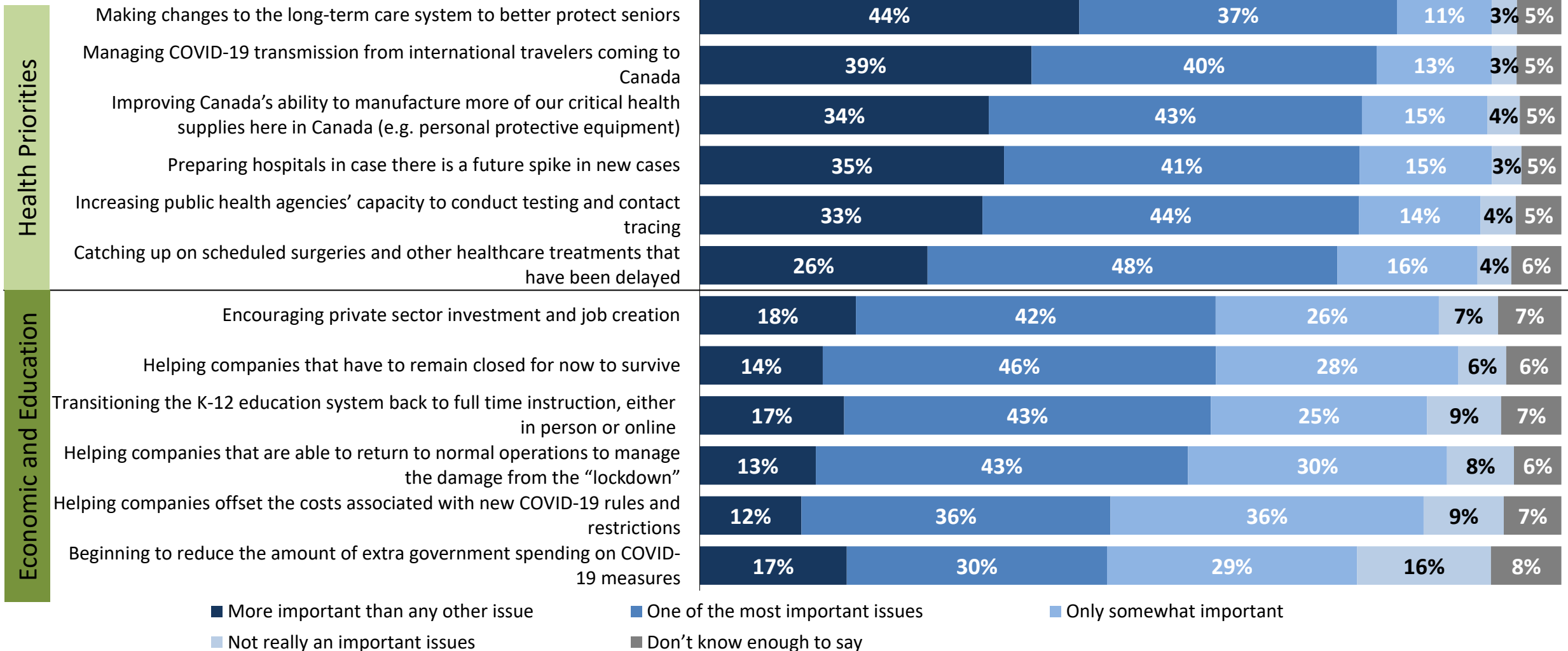
Important Issues: Top issues include protecting seniors, managing transmission from travelers, and manufacturing supplies domestically



Currently, experts expect that COVID-19 outbreaks will continue in Canada for the next year or more. As governments address these ongoing impacts from COVID-19, there are a number of issues they may consider. On the list below, please indicate how important each issue is to you personally?

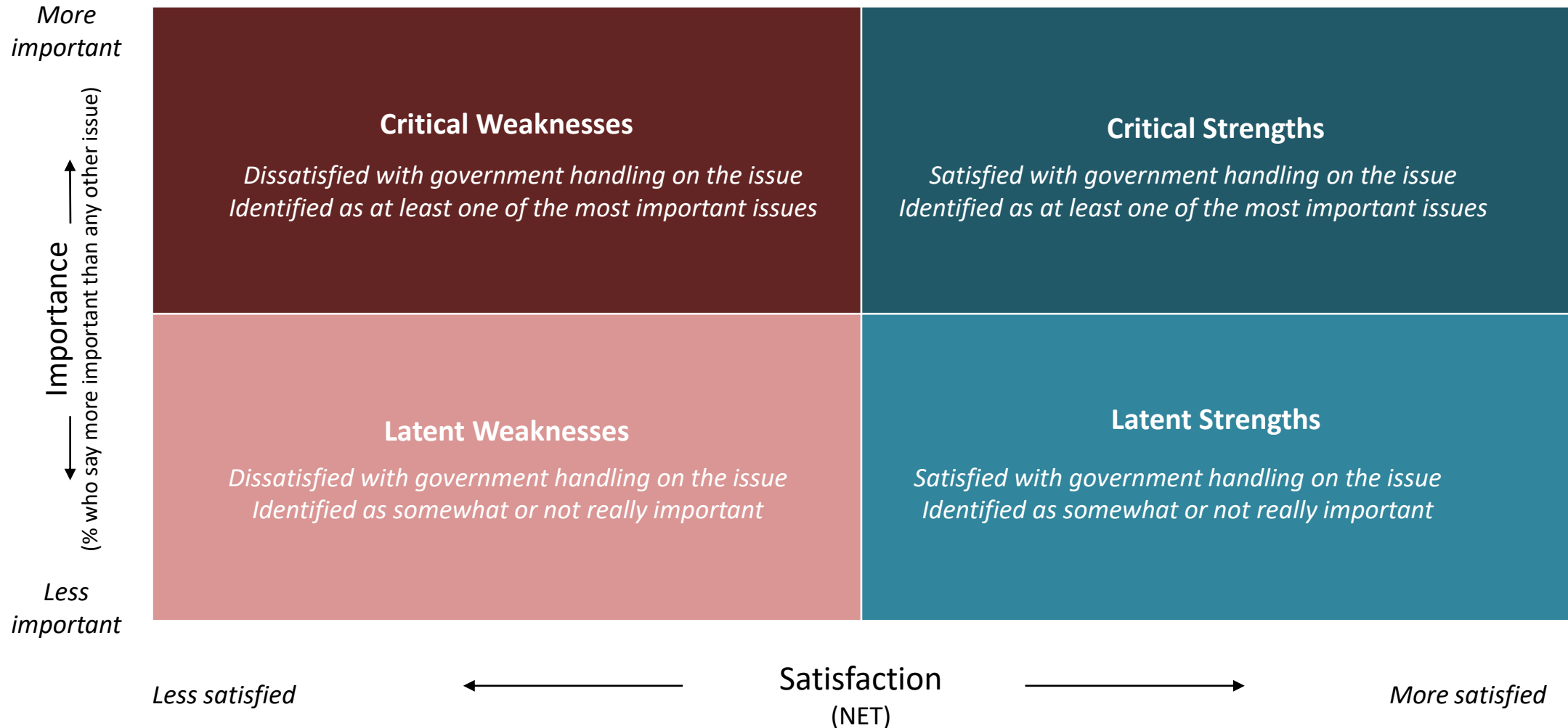
[asked of all respondents; n=1,500]

Results from May 29 – June 1 Polling



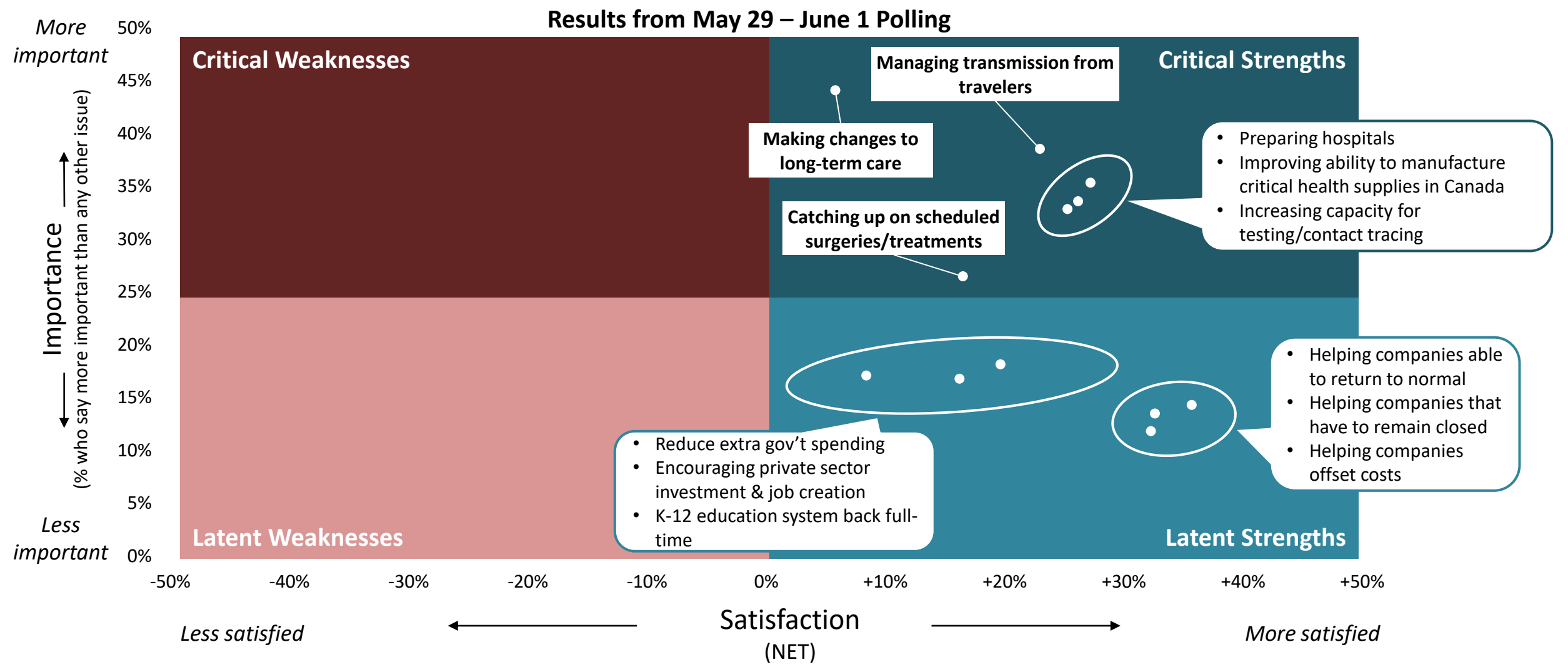
Measuring Importance of Issues vs Satisfaction

When we measure the public's perception of the importance of various issues impacted by the COVID-19 outbreak, we find that respondents place higher importance on some issues compared to others. We call this **importance**. When we compare this to the **satisfaction** of government handling on the issue, we can categorize issues into critical and latent strengths or weaknesses.



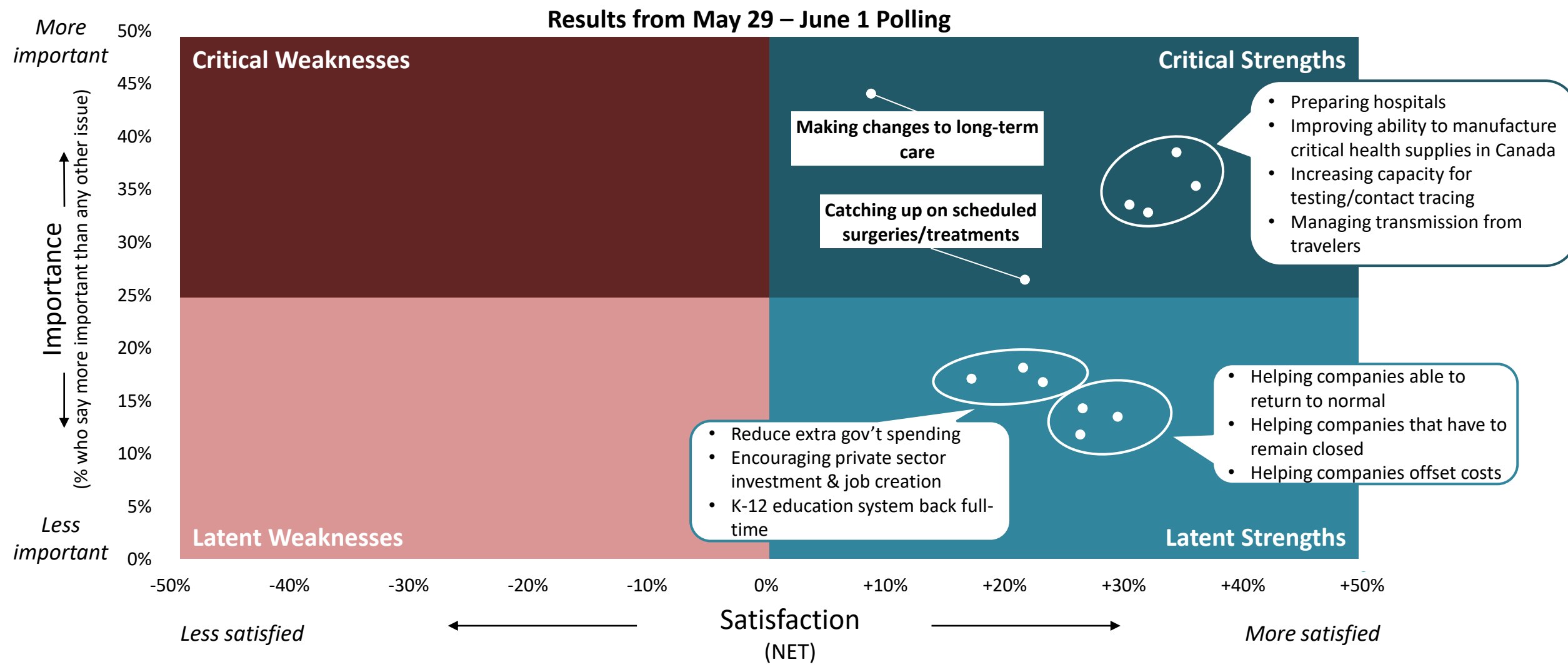
Importance by Federal Satisfaction: Making changes to long term care a key vulnerability for the federal gov't

The federal government is receiving top marks on high-importance issues related to health care such as preparing hospitals for a second wave, improving the ability to manufacture critical health supplies here in Canada, and increasing the capacity of public health agencies to do testing and contact tracing. Making changes to the long-term care system to better protect seniors is the area given the highest importance but receives the lowest net satisfaction score. This area is most at danger for becoming a critical weakness.



Importance by Provincial Satisfaction: Making changes to long-term care homes also greatest vulnerability for provinces

Like the federal government, provincial governments are receiving positive net satisfaction on all areas and are receiving the highest marks on various issues related to public health. Also similar to the federal government, the area most at risk for becoming a critical weakness is for making changes to the long-term care system to better protect seniors.

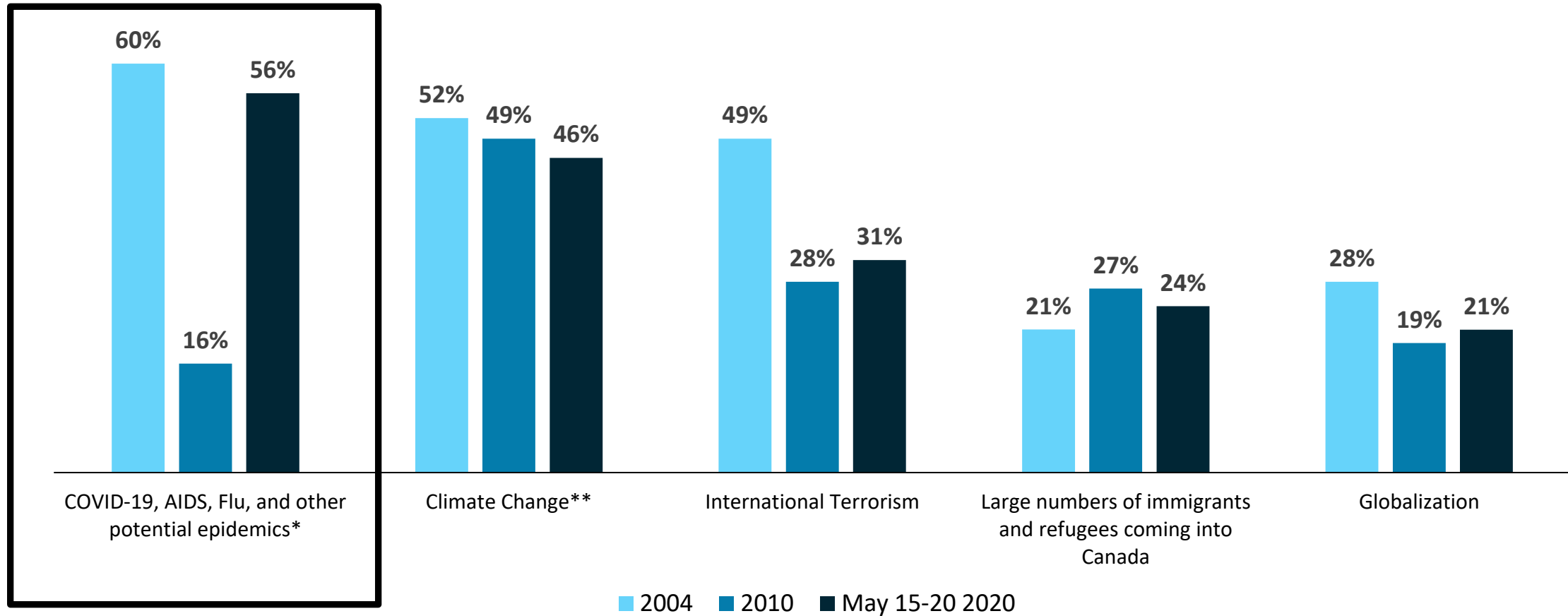


We are fickle



Below is a list of possible threats to the vital interests of Canada in the next 10 years. For each one please indicate whether you see this as a critical threat, an important but not critical threat, or not an important threat at all. **Those who said “Critical threat”**

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



* In 2010, “AIDS, Flu, and other potential epidemics” was used in the survey

** In 2004, “Global Warming” was used in the survey

Five Things to Remember

1. While people see the pandemic as a threat, personal levels of fear and anxiety on many measures are stable as the public is confident in the health and economic measures taken by government.
2. While most Canadians are doing well at limiting social interactions and engaging in safe practices, those who go out the most are taking the fewest precautions while many returning travelers went shopping and met friends and family. Now that people are going out more, we see a decline in several key good practices.
3. The idea of pivoting off COVID into a major economic transition has appeal but it is not translating in different views on the role of government and business. It also is not translating into increased priority for environment although climate change initiatives have initial appeal.
4. Canadians are strongly supportive of the response from all levels of governments to COVID-19, and this is translating into broader support for government generally. It has also resulted in an increase in deference and decline in populism. Most leaders are improving their underlying brand, some dramatically.
5. Most Canadians are in this for the long haul. They expect at least one more wave and their priority is for government to prepare for it. Consistent with that view, there is some unease with the pace of re-opening.



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Building Understanding.