June 2021

COVID-19 and Industry Reputation Tracking

Release Date: July 08, 2021

Field Dates: June 10 to June 29, 2021

Understanding the Impact of COVID-19 on Industry Reputation
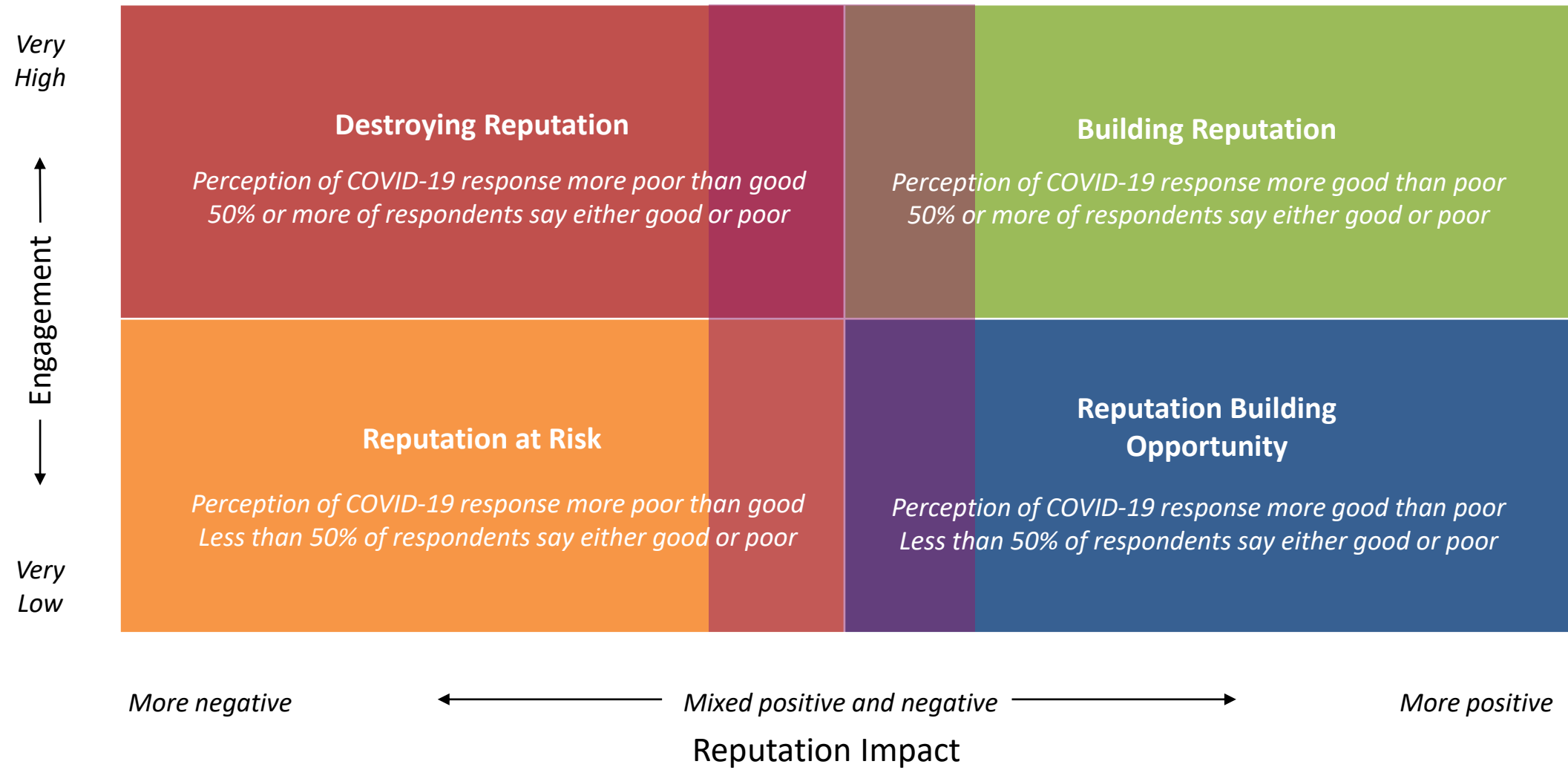
July 8, 2021

COVID-19 has continued to have significant impacts on every part of our lives and the economy, as case counts have continued to both rise and fall across the country.

Some industries have faired better than others. Grocery stores, pharmacies, and hospitals have been at the top of the pack since the September and continue to be in a strong position to improve their reputation. However, not every industry has been as successful: both nursing homes and retirement homes have struggled with their reputation. More respondents believe they have done a poor job handling the pandemic than say they have done a good job.

Since September 2020, construction and manufacturing have suffered the largest decline in their reputation. In September both were among the better performing groups in the publics' opinion, but now they have declined from a net score of +38% for construction and +32% for manufacturing to only +20% and +19% respectively.

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.

Engagement (axis, Very High to Very Low)

Destroying Reputation

*Perception of COVID-19 response more poor than good
50% or more of respondents say either good or poor*

Building Reputation

*Perception of COVID-19 response more good than poor
50% or more of respondents say either good or poor*

Reputation at Risk

*Perception of COVID-19 response more poor than good
Less than 50% of respondents say either good or poor*

Reputation Building Opportunity

*Perception of COVID-19 response more good than poor
Less than 50% of respondents say either good or poor*

More negative — *Mixed positive and negative* — *More positive*

Reputation Impact

Reputational impacts 2021: Nursing/long-term care homes & retirement homes still suffer the largest reputational damage from COVID-19

Only two 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, and pharmacies are seeing high engagement with very positive reputation impacts. **JUNE 2021**
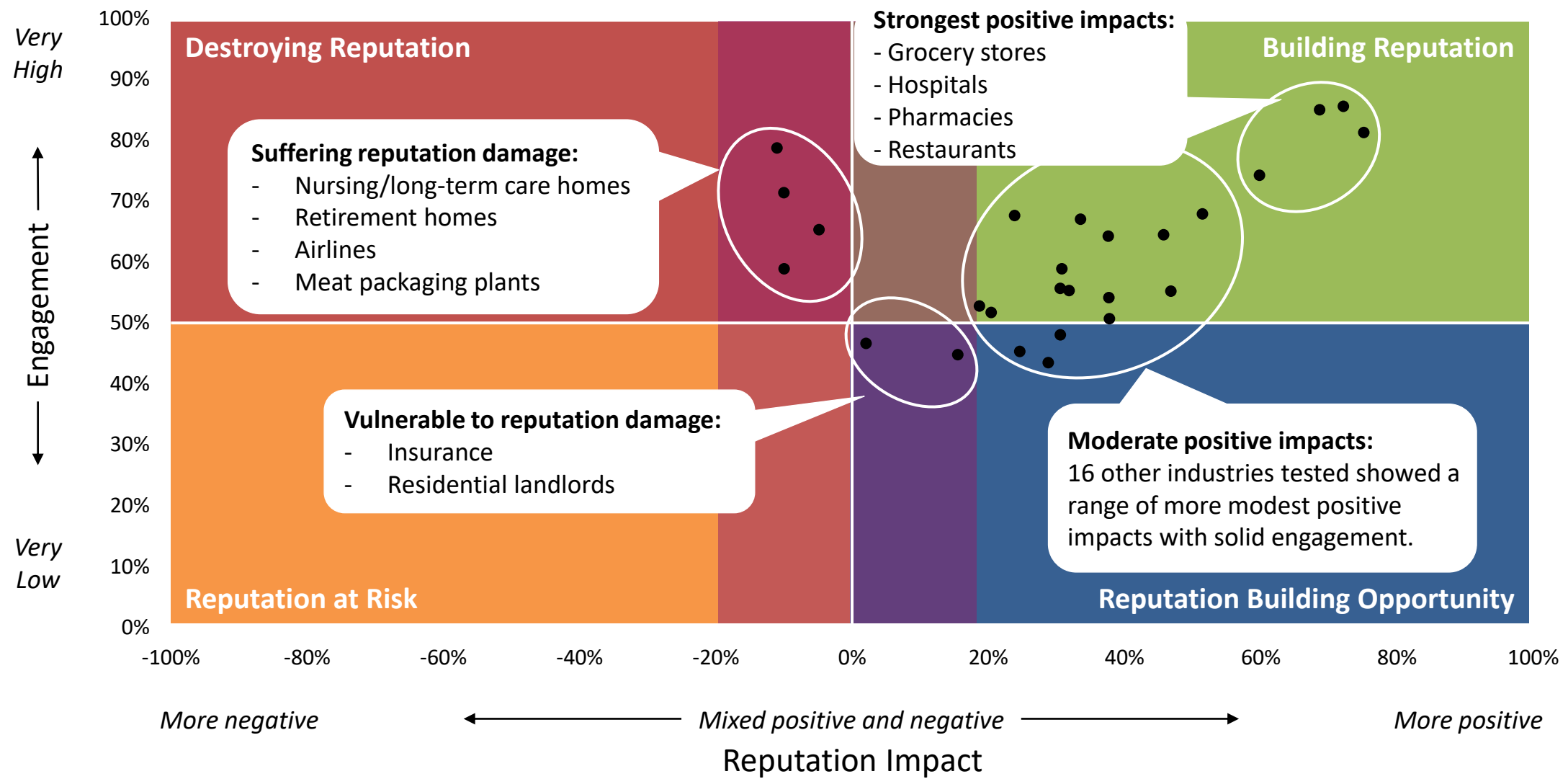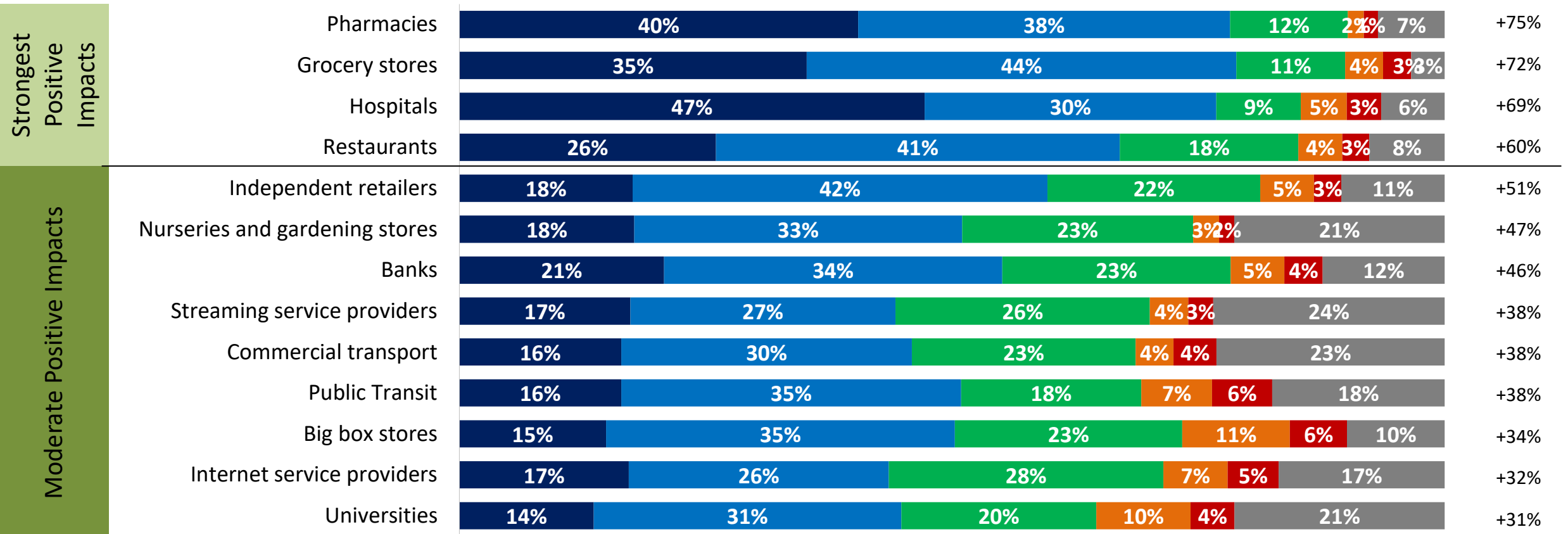
Detailed Results: Pharmacies, grocery stores and hospitals are the clear best performing industries

Q 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]

Net Good

Strongest Positive Impacts

Industry	Very good	Somewhat good	Neither good nor poor	Somewhat poor	Very poor	Don't know	Net Good
Pharmacies	40%	38%	12%	2%	1%	7%	+75%
Grocery stores	35%	44%	11%	4%	3%	3%	+72%
Hospitals	47%	30%	9%	5%	3%	6%	+69%
Restaurants	26%	41%	18%	4%	3%	8%	+60%

Moderate Positive Impacts

Industry	Very good	Somewhat good	Neither good nor poor	Somewhat poor	Very poor	Don't know	Net Good
Independent retailers	18%	42%	22%	5%	3%	11%	+51%
Nurseries and gardening stores	18%	33%	23%	3%	2%	21%	+47%
Banks	21%	34%	23%	5%	4%	12%	+46%
Streaming service providers	17%	27%	26%	4%	3%	24%	+38%
Commercial transport	16%	30%	23%	4%	4%	23%	+38%
Public Transit	16%	35%	18%	7%	6%	18%	+38%
Big box stores	15%	35%	23%	11%	6%	10%	+34%
Internet service providers	17%	26%	28%	7%	5%	17%	+32%
Universities	14%	31%	20%	10%	4%	21%	+31%

■ Very good ■ Somewhat good ■ Neither good nor poor ■ Somewhat poor ■ Very poor ■ Don't know
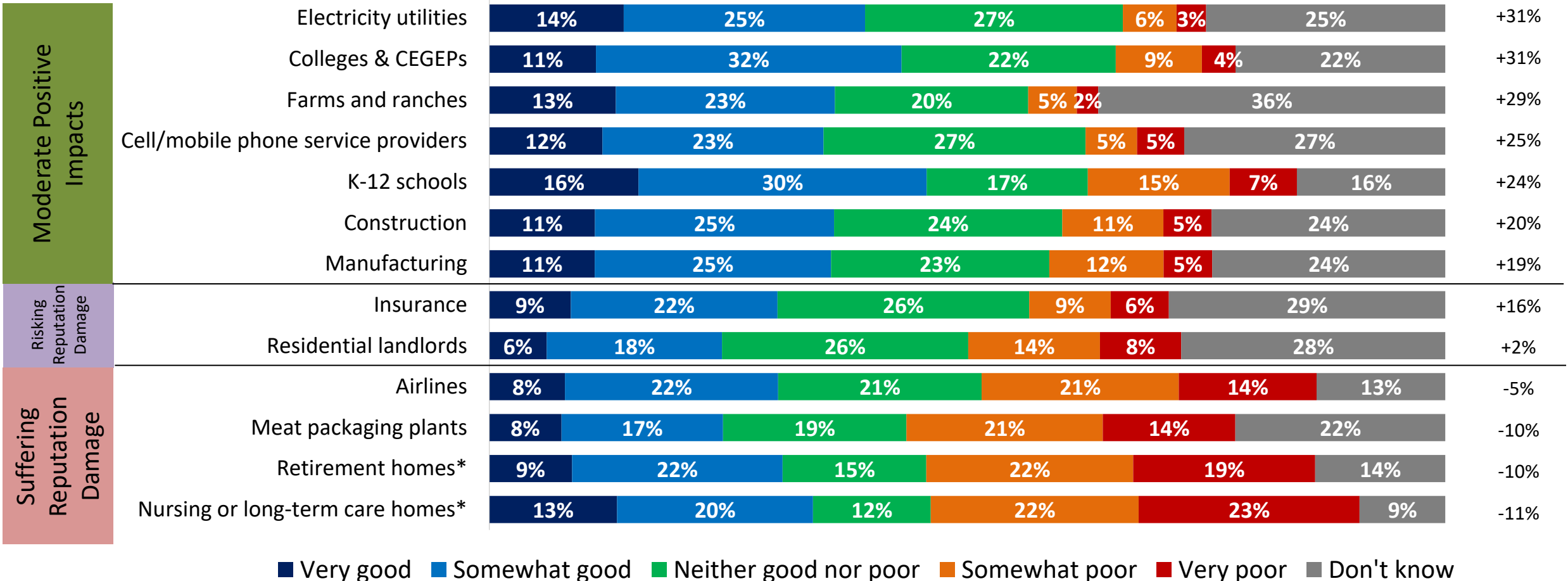
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Detailed Results: Both retirement homes and long-term care homes are suffering reputational damage

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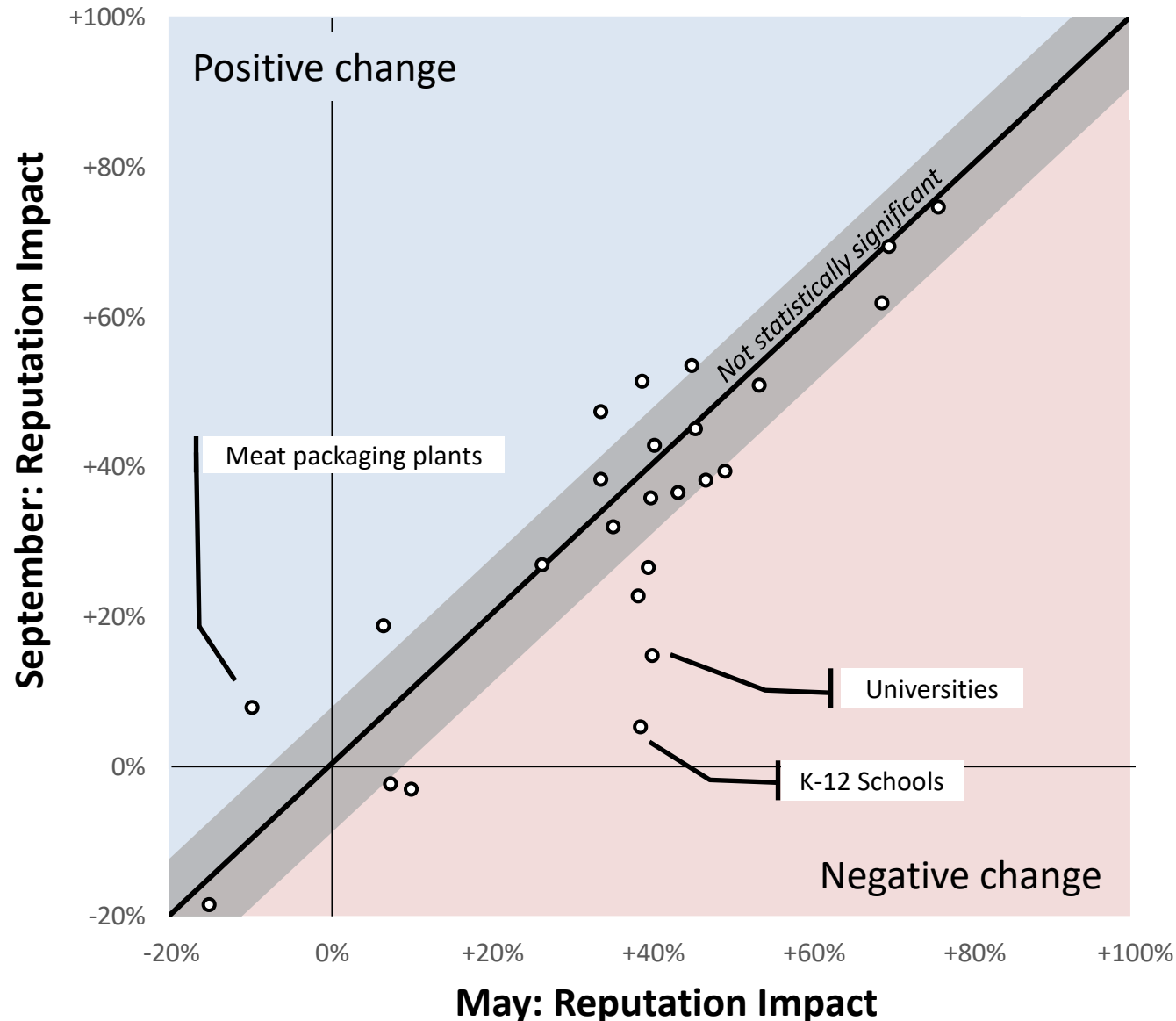
[asked of all respondents, Total n=1,500; split sample each industry is asked of half of the sample at random]

Category	Sector	Very good	Somewhat good	Neither good nor poor	Somewhat poor	Very poor	Don't know	Net Good
Moderate Positive Impacts	Electricity utilities	14%	25%	27%	6%	3%	25%	+31%
Moderate Positive Impacts	Colleges & CEGEPs	11%	32%	22%	9%	4%	22%	+31%
Moderate Positive Impacts	Farms and ranches	13%	23%	20%	5%	2%	36%	+29%
Moderate Positive Impacts	Cell/mobile phone service providers	12%	23%	27%	5%	5%	27%	+25%
Moderate Positive Impacts	K-12 schools	16%	30%	17%	15%	7%	16%	+24%
Moderate Positive Impacts	Construction	11%	25%	24%	11%	5%	24%	+20%
Moderate Positive Impacts	Manufacturing	11%	25%	23%	12%	5%	24%	+19%
Risking Reputation Damage	Insurance	9%	22%	26%	9%	6%	29%	+16%
Risking Reputation Damage	Residential landlords	6%	18%	26%	14%	8%	28%	+2%
Suffering Reputation Damage	Airlines	8%	22%	21%	21%	14%	13%	-5%
Suffering Reputation Damage	Meat packaging plants	8%	17%	19%	21%	14%	22%	-10%
Suffering Reputation Damage	Retirement homes*	9%	22%	15%	22%	19%	14%	-10%
Suffering Reputation Damage	Nursing or long-term care homes*	13%	20%	12%	22%	23%	9%	-11%

■ 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"

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May to September Change: While most industries have seen no significant change, K-12 Schools and Universities have decreased

September: Reputation Impact (vertical axis)

May: Reputation Impact (horizontal axis)

Positive change

Not statistically significant

Meat packaging plants
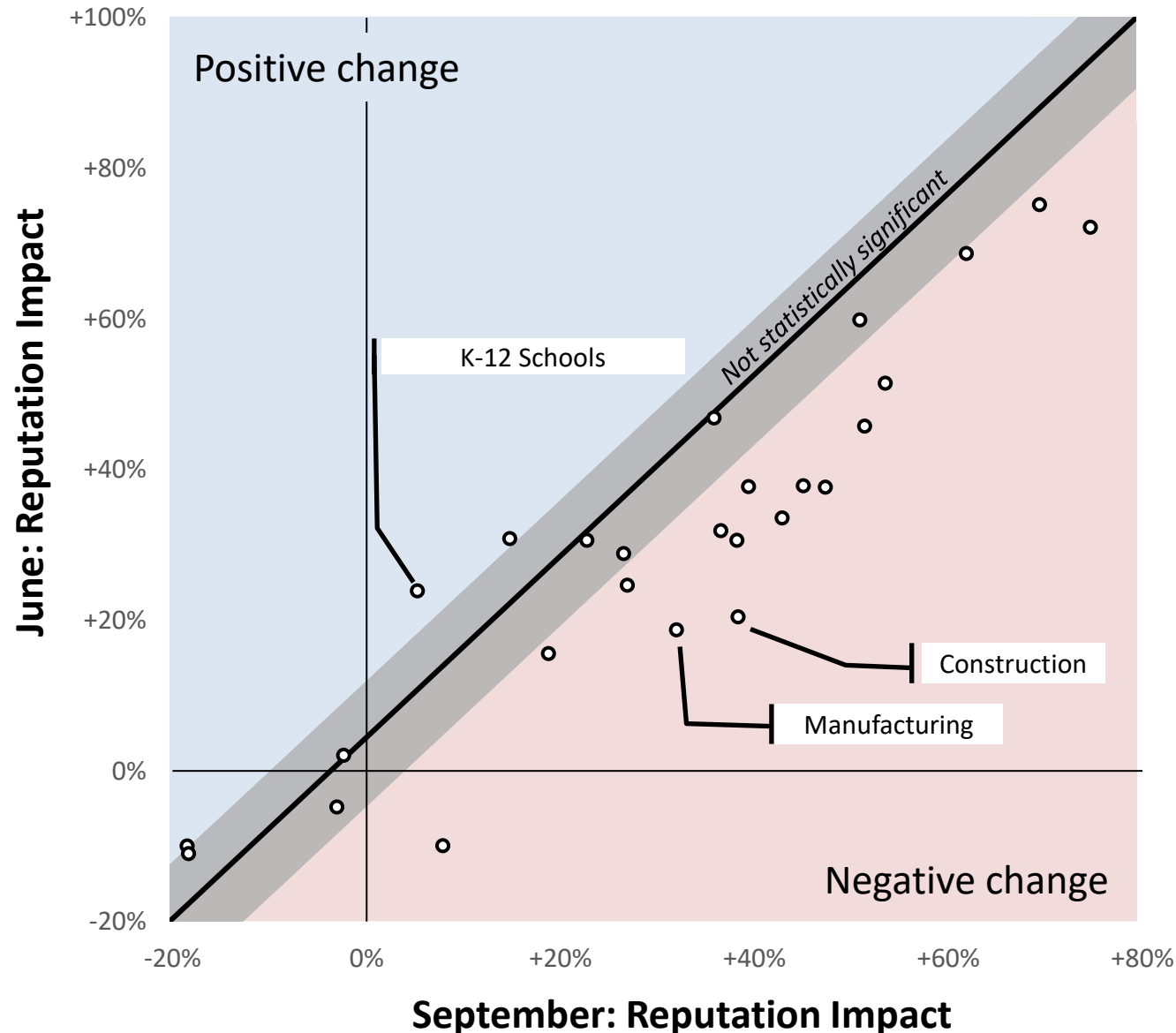
Universities

K-12 Schools

Negative change

This chart shows tracking from our survey in May 2020 to these September 2020 results.

The Reputation Impact Score from April (% who say "Good" minus % who say "Poor") is shown on the horizontal axis. The score from May is shown on the vertical axis.

Industries above the line have seen improvements between May and September. Industries below have seen declines in their score. Differences that fall into the grey band are not statistically significant.

Thirteen industries have seen statistically significant changes from May to September. The largest of these decreases are for **K-12 Schools** which dropped from +38% to +5% and **Universities** which improved from +40% to +15%. The largest increase in reputation was from **Meat Packaging Plants**, which feel from -10% to +8%.

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Sep 2020 to June 2021 Change: K-12 Schools have seen the highest increase while Construction and Manufacturing have decreased

This chart shows tracking from our survey in September 2020 to these June 2021 results.

The Reputation Impact Score from September 2020 (% who say "Good" minus % who say "Poor") is shown on the horizontal axis. The score from September 2020 is shown on the vertical axis.

Industries above the line have seen improvements between September 2020 and June 2021. Industries below have seen declines in their score. Differences that fall into the grey band are not statistically significant.

Eighteen industries have seen statistically significant changes from May to September. The largest of these decreases are for **Construction** which dropped from +38% to +20% and **Manufacturing** which dropped from +32% to +19%. The largest increase in reputation was from **K-12 Schools**, which feel from +5% to +24%.

Tracking | Industry sector response: Pharmacies, hospitals and restaurants are outperforming compared to the past tracking periods

Q 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, June 2021 n=1,500; split sample each industry is asked of half of the sample at random]

Net Good

Strongest Positive Impacts

Pharmacies
- June 2021: Very good 40%, Somewhat good 38%, Neither good nor poor 12%, Very poor 2%, Don't know 7% — **+75%**
- September 2020: Very good 34%, Somewhat good 40%, Neither good nor poor 14%, Somewhat poor 3%, Very poor 2%, Don't know 8% — **+69%**

Grocery Stores
- June 2021: Very good 35%, Somewhat good 44%, Neither good nor poor 11%, Somewhat poor 4%, Very poor 3%, Don't know 3% — **+72%**
- September 2020: Very good 38%, Somewhat good 43%, Neither good nor poor 10%, Somewhat poor 4%, Very poor 2% — **+75%**
- May 2020: Very good 45%, Somewhat good 33%, Neither good nor poor 10%, Somewhat poor 6%, Very poor 2%, Don't know 4% — **+71%**

Hospitals
- June 2021: Very good 47%, Somewhat good 30%, Neither good nor poor 9%, Somewhat poor 5%, Very poor 3%, Don't know 6% — **+69%**
- September 2020: Very good 38%, Somewhat good 34%, Neither good nor poor 11%, Somewhat poor 7%, Very poor 3%, Don't know 7% — **+62%**
- May 2020: Very good 48%, Somewhat good 27%, Neither good nor poor 11%, Somewhat poor 4%, Very poor 2%, Don't know 8% — **+68%**

Restaurants
- June 2021: Very good 26%, Somewhat good 41%, Neither good nor poor 18%, Somewhat poor 4%, Very poor 3%, Don't know 8% — **+60%**
- September 2020: Very good 17%, Somewhat good 47%, Neither good nor poor 18%, Somewhat poor 10%, Very poor 4%, Don't know 4% — **+51%**
- May 2020: Very good 27%, Somewhat good 37%, Neither good nor poor 19%, Somewhat poor 5%, Very poor 3%, Don't know 9% — **+56%**

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

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Tracking| Industry sector response: Nurseries are performing better since the last tracking period while other industries are underperforming
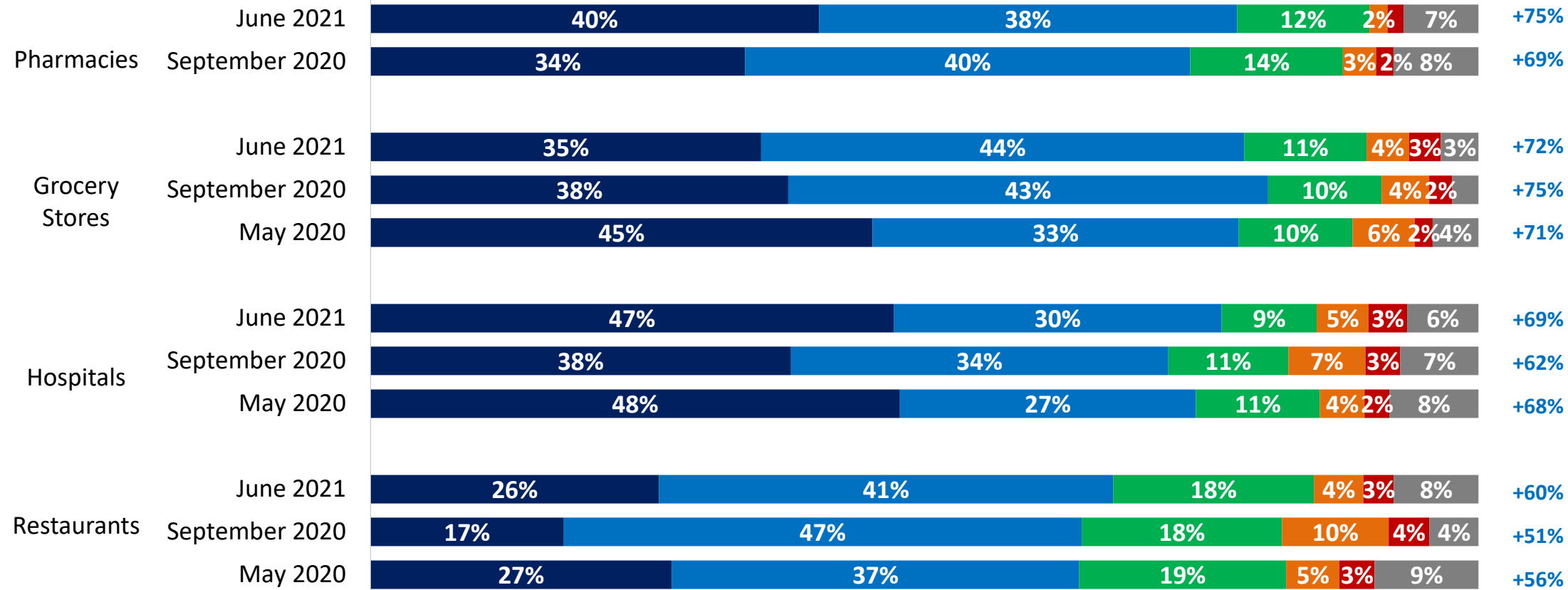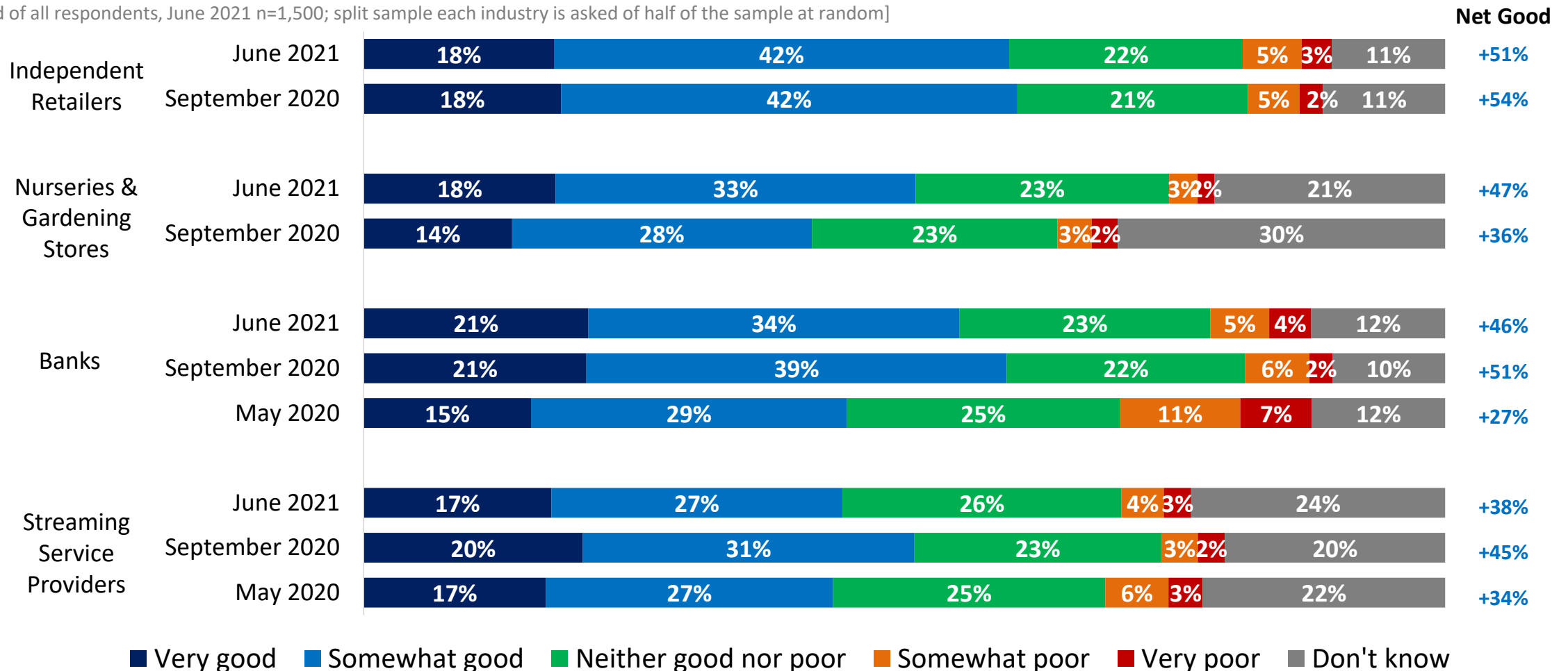
Q Based on what you have read, seen, or heard, would you say each of the sectors below has done a good job or a poor job of responding to the challenges of the COVID-19 crisis?

[asked of all respondents, June 2021 n=1,500; split sample each industry is asked of half of the sample at random]

Net Good

Moderate Positive Impacts

Independent Retailers

Period	Very good	Somewhat good	Neither good nor poor	Somewhat poor	Very poor	Don't know	Net Good
June 2021	18%	42%	22%	5%	3%	11%	+51%
September 2020	18%	42%	21%	5%	2%	11%	+54%

Nurseries & Gardening Stores

Period	Very good	Somewhat good	Neither good nor poor	Somewhat poor	Very poor	Don't know	Net Good
June 2021	18%	33%	23%	3%	2%	21%	+47%
September 2020	14%	28%	23%	3%	2%	30%	+36%

Banks

Period	Very good	Somewhat good	Neither good nor poor	Somewhat poor	Very poor	Don't know	Net Good
June 2021	21%	34%	23%	5%	4%	12%	+46%
September 2020	21%	39%	22%	6%	2%	10%	+51%
May 2020	15%	29%	25%	11%	7%	12%	+27%

Streaming Service Providers

Period	Very good	Somewhat good	Neither good nor poor	Somewhat poor	Very poor	Don't know	Net Good
June 2021	17%	27%	26%	4%	3%	24%	+38%
September 2020	20%	31%	23%	3%	2%	20%	+45%
May 2020	17%	27%	25%	6%	3%	22%	+34%

■ Very good ■ Somewhat good ■ Neither good nor poor ■ Somewhat poor ■ Very poor ■ Don't know
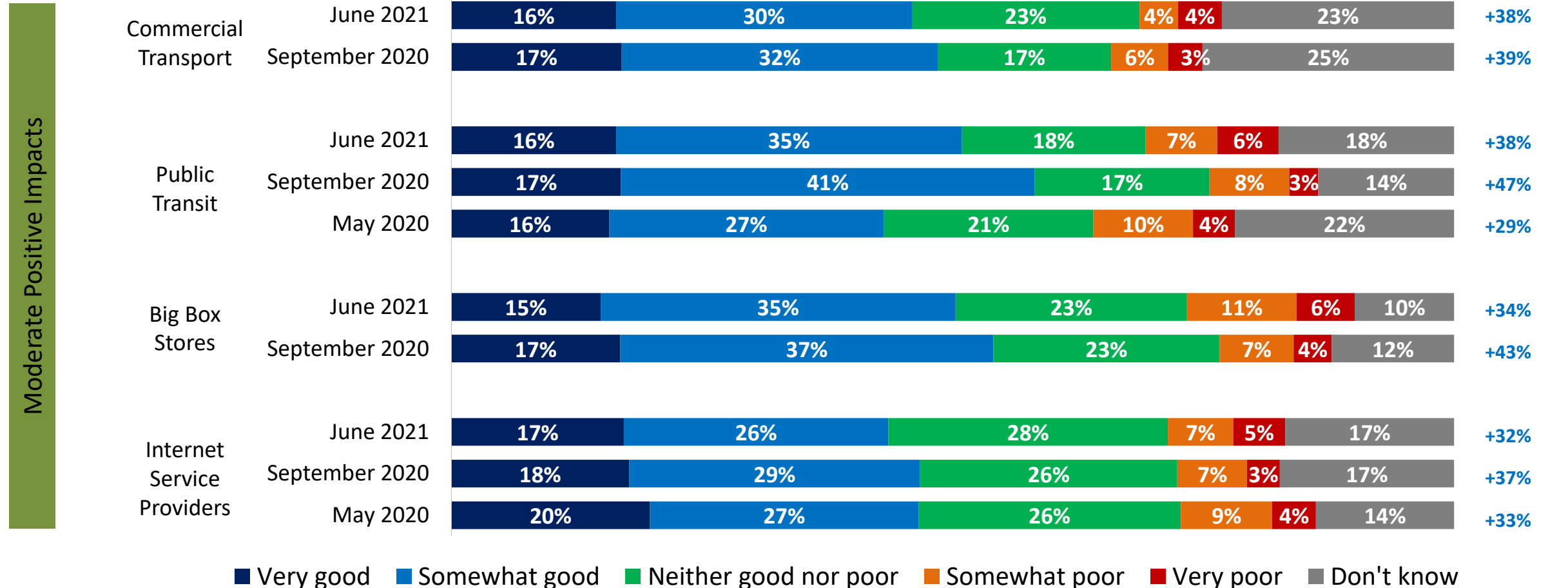
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Tracking| Industry sector response: All of the following industries have underperformed or remained at the same level since previous tracking

Q 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, June 2021 n=1,500; split sample each industry is asked of half of the sample at random]

Net Good

Moderate Positive Impacts

Industry	Period	Very good	Somewhat good	Neither good nor poor	Somewhat poor	Very poor	Don't know	Net Good
Commercial Transport	June 2021	16%	30%	23%	4%	4%	23%	+38%
	September 2020	17%	32%	17%	6%	3%	25%	+39%
Public Transit	June 2021	16%	35%	18%	7%	6%	18%	+38%
	September 2020	17%	41%	17%	8%	3%	14%	+47%
	May 2020	16%	27%	21%	10%	4%	22%	+29%
Big Box Stores	June 2021	15%	35%	23%	11%	6%	10%	+34%
	September 2020	17%	37%	23%	7%	4%	12%	+43%
Internet Service Providers	June 2021	17%	26%	28%	7%	5%	17%	+32%
	September 2020	18%	29%	26%	7%	3%	17%	+37%
	May 2020	20%	27%	26%	9%	4%	14%	+33%

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

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Tracking| Industry sector response: Universities and Colleges are performing better since the last tracking period

Q 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, June 2021 n=1,500; split sample each industry is asked of half of the sample at random]
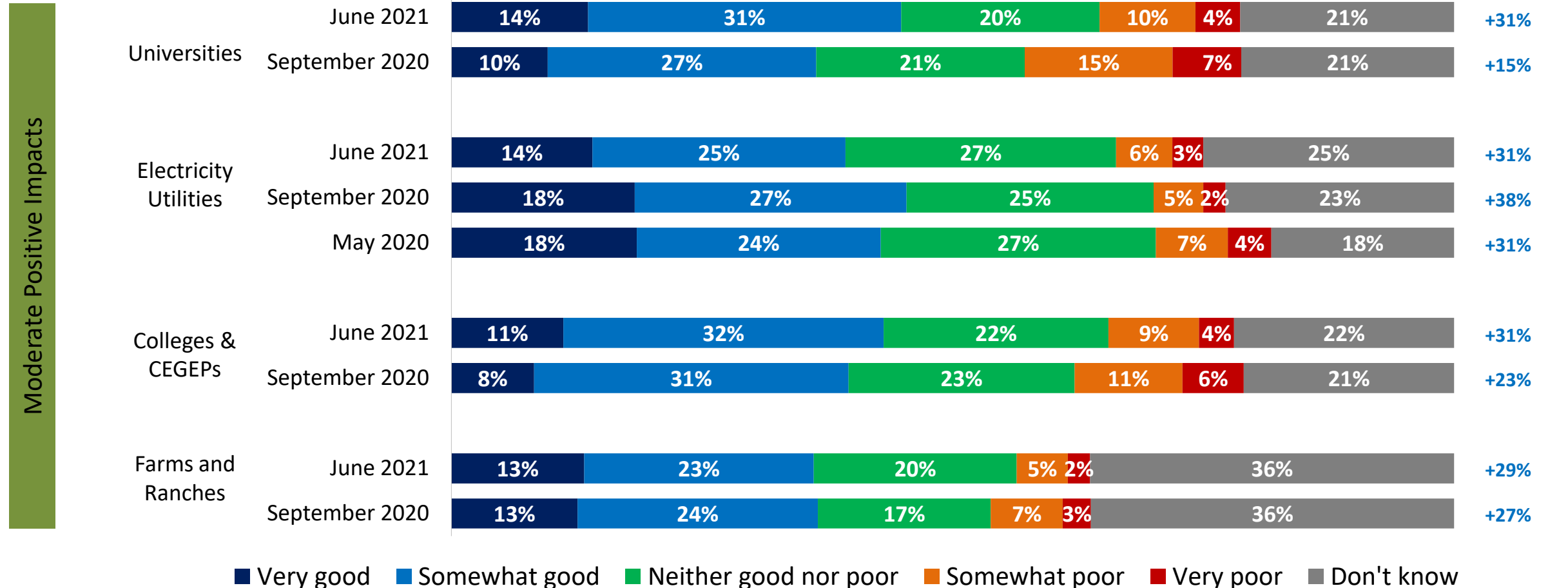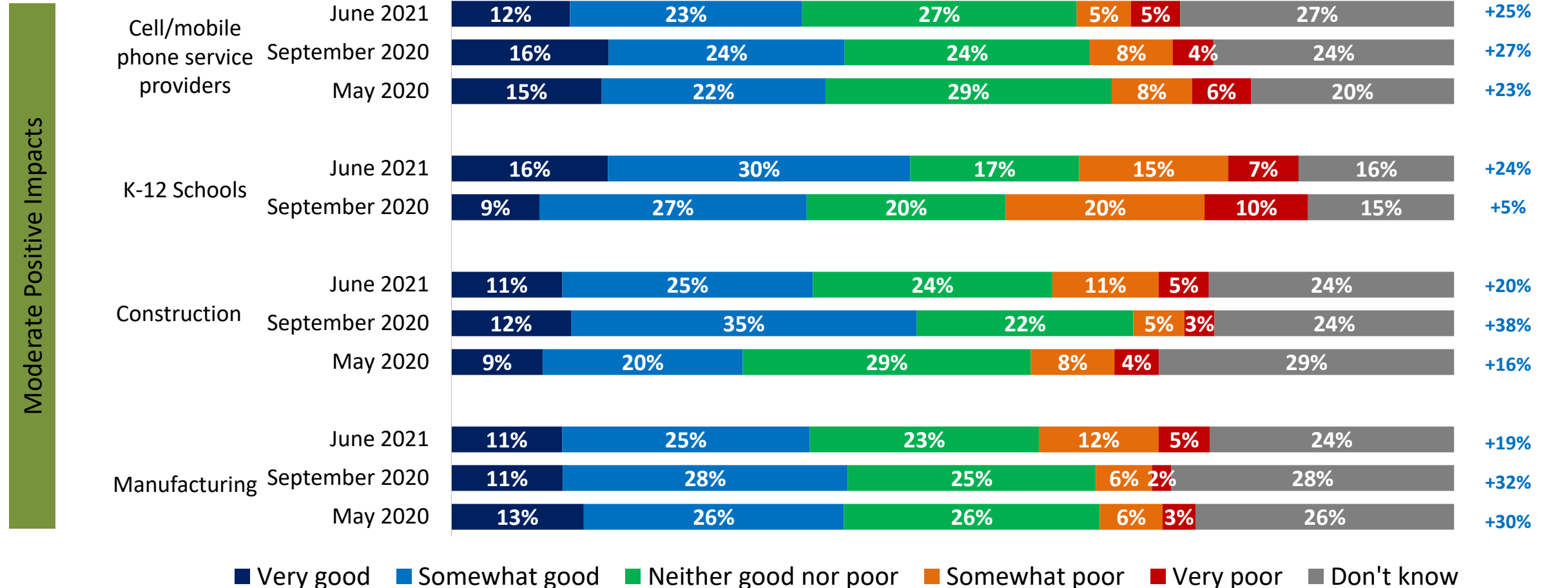
Net Good

Moderate Positive Impacts

Universities
	Very good	Somewhat good	Neither good nor poor	Somewhat poor	Very poor	Don't know	Net Good
June 2021	14%	31%	20%	10%	4%	21%	+31%
September 2020	10%	27%	21%	15%	7%	21%	+15%

Electricity Utilities
	Very good	Somewhat good	Neither good nor poor	Somewhat poor	Very poor	Don't know	Net Good
June 2021	14%	25%	27%	6%	3%	25%	+31%
September 2020	18%	27%	25%	5%	2%	23%	+38%
May 2020	18%	24%	27%	7%	4%	18%	+31%

Colleges & CEGEPs
	Very good	Somewhat good	Neither good nor poor	Somewhat poor	Very poor	Don't know	Net Good
June 2021	11%	32%	22%	9%	4%	22%	+31%
September 2020	8%	31%	23%	11%	6%	21%	+23%

Farms and Ranches
	Very good	Somewhat good	Neither good nor poor	Somewhat poor	Very poor	Don't know	Net Good
June 2021	13%	23%	20%	5%	2%	36%	+29%
September 2020	13%	24%	17%	7%	3%	36%	+27%

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

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Tracking| Industry sector response: Schools are outperforming since the last tracking period while other industries are underperforming

Q 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, June 2021 n=1,500; split sample each industry is asked of half of the sample at random]
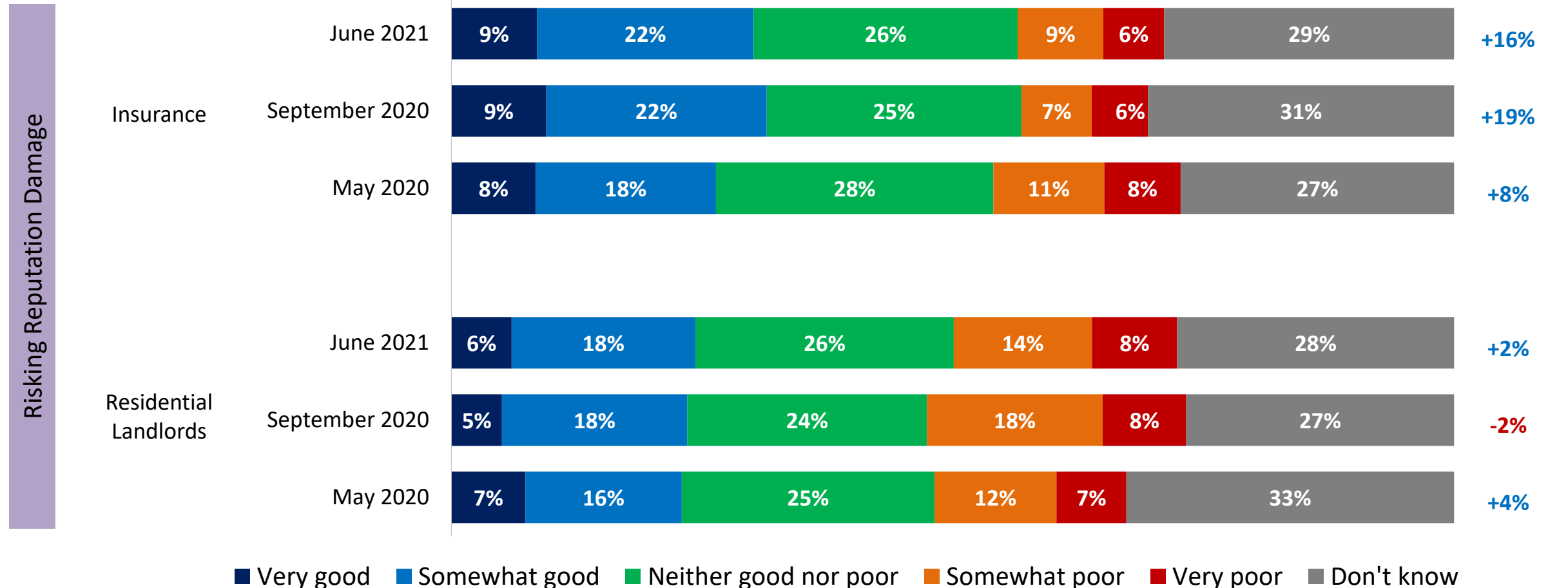
Moderate Positive Impacts

		Very good	Somewhat good	Neither good nor poor	Somewhat poor	Very poor	Don't know	Net Good
Cell/mobile phone service providers	June 2021	12%	23%	27%	5%	5%	27%	+25%
	September 2020	16%	24%	24%	8%	4%	24%	+27%
	May 2020	15%	22%	29%	8%	6%	20%	+23%
K-12 Schools	June 2021	16%	30%	17%	15%	7%	16%	+24%
	September 2020	9%	27%	20%	20%	10%	15%	+5%
Construction	June 2021	11%	25%	24%	11%	5%	24%	+20%
	September 2020	12%	35%	22%	5%	3%	24%	+38%
	May 2020	9%	20%	29%	8%	4%	29%	+16%
Manufacturing	June 2021	11%	25%	23%	12%	5%	24%	+19%
	September 2020	11%	28%	25%	6%	2%	28%	+32%
	May 2020	13%	26%	26%	6%	3%	26%	+30%

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

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Tracking | Industry sector response: Residential landlords have started to perform better after a decline in performance in Sept 2020

Q 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, June 2021 n=1,500; split sample each industry is asked of half of the sample at random]
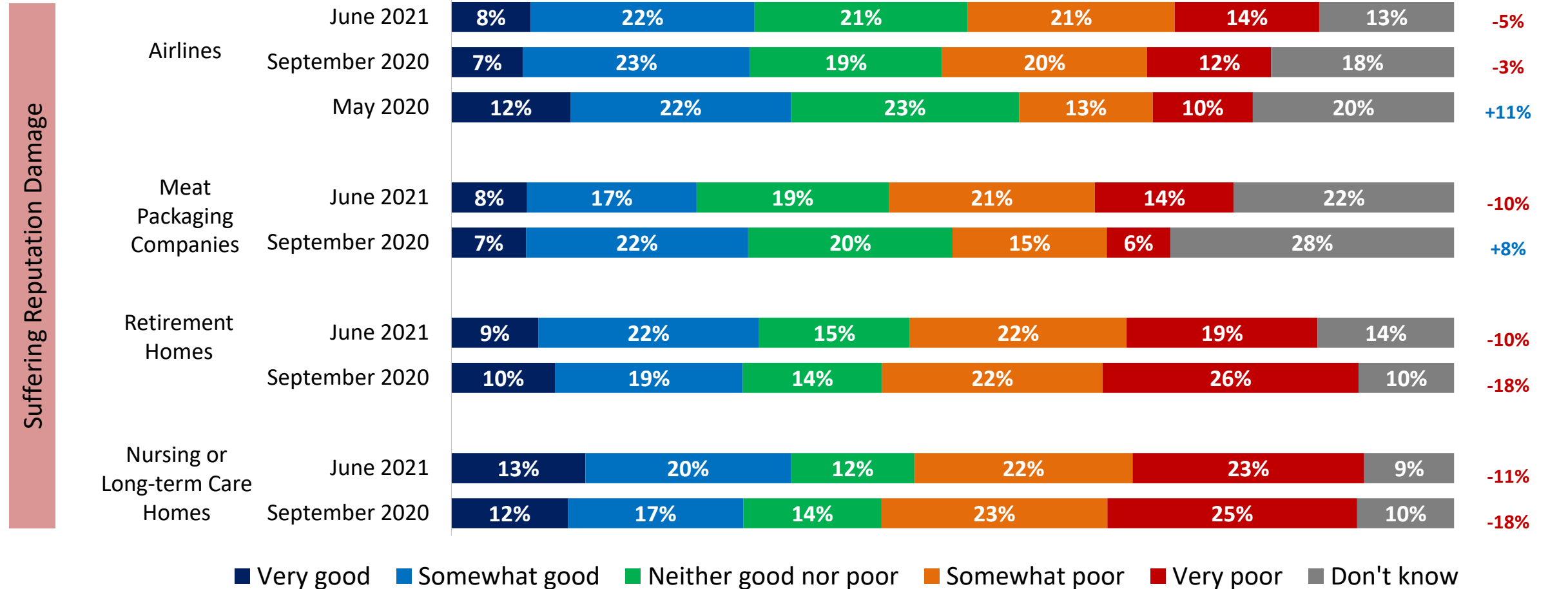
Net Good

Risking Reputation Damage

Insurance

	Very good	Somewhat good	Neither good nor poor	Somewhat poor	Very poor	Don't know	Net Good
June 2021	9%	22%	26%	9%	6%	29%	+16%
September 2020	9%	22%	25%	7%	6%	31%	+19%
May 2020	8%	18%	28%	11%	8%	27%	+8%

Residential Landlords

	Very good	Somewhat good	Neither good nor poor	Somewhat poor	Very poor	Don't know	Net Good
June 2021	6%	18%	26%	14%	8%	28%	+2%
September 2020	5%	18%	24%	18%	8%	27%	-2%
May 2020	7%	16%	25%	12%	7%	33%	+4%

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

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Tracking| Industry sector response: Retirement and nursing homes are performing better since the last tracking period

Net Good

Suffering Reputation Damage

Sector	Period	Very good	Somewhat good	Neither good nor poor	Somewhat poor	Very poor	Don't know	Net Good
Airlines	June 2021	8%	22%	21%	21%	14%	13%	-5%
	September 2020	7%	23%	19%	20%	12%	18%	-3%
	May 2020	12%	22%	23%	13%	10%	20%	+11%
Meat Packaging Companies	June 2021	8%	17%	19%	21%	14%	22%	-10%
	September 2020	7%	22%	20%	15%	6%	28%	+8%
Retirement Homes	June 2021	9%	22%	15%	22%	19%	14%	-10%
	September 2020	10%	19%	14%	22%	26%	10%	-18%
Nursing or Long-term Care Homes	June 2021	13%	20%	12%	22%	23%	9%	-11%
	September 2020	12%	17%	14%	23%	25%	10%	-18%

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

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Methodology

Survey Methodology

These are the results of an online survey conducted between June 10th and June 29th, 2021.

Method: This online survey was conducted using INNOVATIVE's Canada 20/20 national research panel with additional respondents from Dynata, 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.

For the industry reputation questions, each industry is asked of half the sample at random to reduce survey fatigue.

Sample Size: n=1,887 general population, 18 years or older. The results are weighted to n=1,500 based on Census data from Statistics Canada.

Field Dates: June 10th to 29th, 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	151	8.0%	197	13.3%
Males 35-54	257	13.7%	245	16.5%
Males 55+	517	27.5%	272	18.3%
Females 18-34	218	11.6%	205	13.8%
Females 35-54	301	16.0%	257	17.3%
Females 55+	433	23.1%	306	20.6%
BC	287	15.2%	199	13.3%
Alberta	244	12.9%	167	11.1%
Prairies	89	4.7%	99	6.6%
Ontario	683	36.2%	581	38.8%
Quebec	430	22.8%	350	23.3%
Atlantic	154	8.2%	103	6.9%

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Building Understanding.