COVID-19

Weekly Monitoring of Canadian Perceptions & Behaviour

WAVE 8

May 6, 2020

Next report will be available: Wednesday May 13
Methodology

STUDY

With the coronavirus outbreak in Canada and abroad, Angus Reid has commenced a weekly tracking study in order to investigate the current state of Canadian perceptions and the way this pandemic has affected their day-to-day lives and how it’s changing over time.

FIELD DATES

Wave 1: March 16 – 17, 2020
Wave 2: March 23 – 24, 2020
Wave 3: March 30 – 31, 2020
Wave 4: April 6 – 7, 2020
Wave 5: April 13-14, 2020
Wave 6: April 20 – 21, 2020
Wave 7: April 27-28, 2020
Wave 8: May 4-5, 2020

Field date for the next wave Monday May 11th.

SAMPLE

Wave 1: n=1,514, Wave 2: n=1,004
Wave 3: n=1,006, Wave 4: n=1,007
Wave 5: n=1,015, Wave 6: n=1,003
Wave 7: n=1,004, Wave 8: n=1,002

For this most recent wave, a representative sample of n=1,002 Canadian Adults (age 18+ yrs.) who are members of the Angus Reid Forum. The sample frame was balanced and weighted on age, gender, and province according to latest Census data. For comparison purposes only, a probability sample of this size would yield a margin of error of +/- 3.1%, 19 times of out 20.

NOTE

Throughout the report, ▼ and ▲ are used to denote statistically significant increases or decreases from previous waves at 95% confidence level.

Tracking data shown in text on the right side of charts omits March 30-31 and April 13-14 waves.
5 Things You Should Know

01

“New normal” of optimism has stabilized. We’ve reached a new phase of lower stress levels and optimism in Canada where perceptions have been relatively consistent over the last 2-3 weeks. The proportion who are not very stressed about the virus have overtaken those who are very/extremely stressed. Roughly 7-in-10 Canadians say that things are getting better in Canada.

02

Itching to get out. Over the last two weeks, there has been a sharp increase in the perception that "it's time for things to go back to normal". Additionally, 1-in-5 Canadians report having a difficult time maintaining social distancing right now. Each week, more and more indicate that they’re ready to go out to retail shopping, restaurants, malls, theaters and even airports.

03

It's time to re-open. Coupled with this urge to end social distancing, more Canadians are also indicating that it’s time to open up businesses and parks. Over the last two weeks, there has also been an uptake in the sentiment that “now is the time to start stimulating the economy back to health”.

04

Rise of the sceptics. In stark contrast to just three weeks ago, now a full quarter of Canadians agree that the health risk of the coronavirus has been overblown. When asked what they are more concerned about, 43% of Canadians say they are more concerned about the economy (compared to 57% who are concerned about the health crisis).

05

Sector winners and losers When asked which sectors have been hit hardest by the epidemic, hotels & tourism, airlines and restaurants top the list. Canadians see grocery stores, technology and telecom providers as sectors who have benefitted during this time.
Key Findings
Level of Stress from COVID-19 Pandemic

May 4-5, 2020

Q: Generally speaking, how would you describe your level of stress, if any, about the coronavirus outbreak?

Q: How concerned are you about . . .

Concern about Getting Sick
(Extremely, very concerned)

Base: TOTAL (n=1,002)

Q: How concerned are you about . . .

Base: TOTAL applicable (n=various)

CANADA.CA
# new cases
in Canada each week

Level of Stress

Extremely/very
stressed
Not very/not at all
stressed
Concern for
parents
Concern for
children
Concern for
self

Mar 16-17
Mar 23-24
Mar 30-31
Apr 6-7
Apr 13-14
Apr 20-21
Apr 27-28
May 4-5

374
NEW CASES
2,278
NEW CASES
5,756
NEW CASES
9,349
NEW CASES
9,166
NEW CASES
11,359
NEW CASES
11,604
NEW CASES
12,020
NEW CASES

0%
10%
20%
30%
40%
50%
60%
70%
80%
90%
100%

6%
22%
32%
33%
36%
57%

0
2,000
4,000
6,000
8,000
10,000
12,000

Very / Extremely
Stressed
Stressed
Not very
stressed
Not at all
stressed

57%
36%
26%
22%

57%
36%
30%
22%

Your parents (if over 65 yrs.)
Your children (under 12 yrs.)
People in your community
You personally

57%
36%
30%
22%

NEW CASES
NEW CASES
NEW CASES
NEW CASES
NEW CASES
NEW CASES
NEW CASES

Questions that matter.
Are Things Getting Better or Worse?

Thinking about coronavirus, do you think things are getting better or worse...

- 71% Better
- 29% Worse

In your community
- 69% Better
- 29% Worse

In Canada
- 69% Better
- 31% Worse

Worldwide
- 52% Better
- 48% Worse

NEW CASES

- Mar 16-17: 65,928
- Mar 23-24: 222,009
- Mar 30-31: 434,463
- Apr 6-7: 465,680
- Apr 13-14: 556,623
- Apr 20-21: 558,201
- Apr 27-28: 555,362
- May 4-5: 562,678

Are things getting better or worse?

# new cases
Globally each week

Better – around the world
Better – in Canada
Better - in my community

Base: TOTAL (n=1,002)
Q: Thinking about coronavirus, do you think things are getting better or worse...
COVID-19 Perceptions

% Agree
(Strongly agree or Agree)

Things are going to get worse before they get better 65%

It’s time for things to go back to normal 41%

The health risk of the coronavirus has been overblown 27%

Base: TOTAL (n=1,002)
Q: To what extent do you agree or disagree with the following statements about the coronavirus

Δ last week
Apr 27-28 Apr 20-21 Apr 6-7 Mar 23-24 Mar 16-17

-1 66% 72% 92% 94% 92%

+5 36% 33% 32% 34% 44%

+5 22% 19% 14% 14% 28%

May 4-5, 2020
Spare Time During the Pandemic

Since the start of the crisis, have you found that you had...

- More time on your hands than before: 55%
- About the same amount of time than before: 34%
- Less time on your hands than before: 12%

21% of Parents (with children under 18 in household) have LESS time on their hands.
Perceptions of Social Distancing

How Long People Think They Can Keep Social Distancing

<table>
<thead>
<tr>
<th>Duration</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>I'm having a hard time maintaining it now</td>
<td>17%</td>
</tr>
<tr>
<td>A few more weeks</td>
<td>22%</td>
</tr>
<tr>
<td>About another month or so</td>
<td>17%</td>
</tr>
<tr>
<td>Another few months or so</td>
<td>22%</td>
</tr>
<tr>
<td>Indefinitely</td>
<td>22%</td>
</tr>
</tbody>
</table>

Q. How long do you think you are personally able to maintain this current state of social distancing?

Base: Exclude “Don’t believe in social distancing” (n=983)

Self-Rating of Own Social Distancing Practices

<table>
<thead>
<tr>
<th>Rating</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>I've done all that I can to socially distance myself</td>
<td>48%</td>
</tr>
<tr>
<td>I've been very diligent about social distancing but I'm sure that there's more I could do</td>
<td>41%</td>
</tr>
<tr>
<td>I've put some effort in but not too much</td>
<td>9%</td>
</tr>
<tr>
<td>I have put little or no effort in social distancing</td>
<td>1%</td>
</tr>
<tr>
<td>I don't believe in social distancing</td>
<td>1%</td>
</tr>
</tbody>
</table>

Q: We've all been asked by the government to “socially distance” ourselves as best we can. How would you rate your own socially distancing efforts?

Base: All respondents (n=1,002)
Financial Concern

Q: As a result of the coronavirus, how concerned are you about The Canadian economy?

Q: As a result of the coronavirus, how concerned are you about Your personal finances?

Base: TOTAL (n=1,002)

Concern about Canadian Economy

Concern about Personal Finances
Concern Over Economy versus Health Crisis During Pandemic

May 4-5, 2020

Q. If you had to choose, which aspect of the COVID-19 situation are you currently more personally concerned about?

% Concerned About the Economy vs. the Health Crisis

- More Concerned about Economy: 43%
- More Concerned about Health Crisis: 57%

Base: Total (n=1,002)
Perceived Effect on Economic Sectors

<table>
<thead>
<tr>
<th>Hit Hardest During the Pandemic</th>
<th>Benefited Economically During Pandemic</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hotels &amp; Tourism</td>
<td>84%</td>
</tr>
<tr>
<td>Airlines</td>
<td>83%</td>
</tr>
<tr>
<td>Restaurants</td>
<td>80%</td>
</tr>
<tr>
<td>Retail</td>
<td>64%</td>
</tr>
<tr>
<td>Creative Industries</td>
<td>38%</td>
</tr>
<tr>
<td>Energy sector</td>
<td>27%</td>
</tr>
<tr>
<td>Agriculture &amp; fishing</td>
<td>22%</td>
</tr>
<tr>
<td>Real Estate, construction &amp; trades</td>
<td>18%</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>15%</td>
</tr>
<tr>
<td>Groceries, food &amp; Beverage</td>
<td>8%</td>
</tr>
<tr>
<td>Business/Professional Services</td>
<td>7%</td>
</tr>
<tr>
<td>Advertising, Marketing or Public Relations</td>
<td>5%</td>
</tr>
<tr>
<td>Financial Services, Banks &amp; Insurance</td>
<td>3%</td>
</tr>
<tr>
<td>Technology and Telecommunications</td>
<td>1%</td>
</tr>
<tr>
<td>None of these</td>
<td>2%</td>
</tr>
</tbody>
</table>

Base: TOTAL applicable (n=1,002)

Q: If you had to choose, which of these sectors do you think has been hardest hit economically by the crisis?

Q: If you had to choose, which of these sectors do you think have prospered or benefitted economically through the crisis?
Financial Actions Taken as a Result of COVID-19

May 4-5, 2020

Q: How likely are you to do any of the following related to your finances as a result of the coronavirus?

% Have Done

- Cut back on spending: 40%
- Ensure I have an available cash nest egg for the duration of the crisis: 33%
- Made investments: 16%
- Talk to someone at a financial institution about your finances: 16%
- Sold investments: 7%
- Cancelled automatic bill payments: 7%
- Cash in some/all of RRSP: 5%
- Cash in some/all my TFSA: 4%

Base: TOTAL applicable (n=various)

Δ last week

<table>
<thead>
<tr>
<th>Action</th>
<th>Apr 27-28</th>
<th>Apr 20-21</th>
<th>Apr 6-7</th>
<th>Mar 23-24</th>
<th>Mar 16-17</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cut back on spending</td>
<td>-6</td>
<td>46%</td>
<td>42%</td>
<td>38%</td>
<td>39%</td>
</tr>
<tr>
<td>Ensure I have an available cash nest egg for the duration of the crisis</td>
<td>-1</td>
<td>34%</td>
<td>34%</td>
<td>37%</td>
<td>31%</td>
</tr>
<tr>
<td>Made investments</td>
<td>+3</td>
<td>13%</td>
<td>17%</td>
<td>14%</td>
<td>8%</td>
</tr>
<tr>
<td>Talk to someone at a financial institution about your finances</td>
<td>+4</td>
<td>12%</td>
<td>16%</td>
<td>15%</td>
<td>11%</td>
</tr>
<tr>
<td>Sold investments</td>
<td>-1</td>
<td>8%</td>
<td>8%</td>
<td>7%</td>
<td>6%</td>
</tr>
<tr>
<td>Cancelled automatic bill payments</td>
<td>+1</td>
<td>6%</td>
<td>6%</td>
<td>7%</td>
<td>6%</td>
</tr>
<tr>
<td>Cash in some/all of RRSP</td>
<td>+1</td>
<td>4%</td>
<td>4%</td>
<td>5%</td>
<td>2%</td>
</tr>
<tr>
<td>Cash in some/all my TFSA</td>
<td>-2</td>
<td>6%</td>
<td>6%</td>
<td>4%</td>
<td>5%</td>
</tr>
</tbody>
</table>
### Perceptions of Advertising and Finances

#### On advertising & business...

<table>
<thead>
<tr>
<th>Statement</th>
<th>% Agree (Strongly agree or Agree)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Canadian companies that take an active role during this crisis will have gained a loyal customer in me</td>
<td>79%</td>
</tr>
<tr>
<td>It’s reassuring to hear from Canadian companies at this time</td>
<td>77%</td>
</tr>
<tr>
<td>Now is the time to start stimulating our economy back to health</td>
<td>64%</td>
</tr>
<tr>
<td>It’s in poor taste for airline companies to advertise right now</td>
<td>57%</td>
</tr>
<tr>
<td>It’s about time the government starts re-opening public places (like parks)</td>
<td>55%</td>
</tr>
<tr>
<td>My bank (or primary financial institution) has my back during this crisis</td>
<td>49%</td>
</tr>
<tr>
<td>It’s about time the government starts re-opening businesses</td>
<td>49%</td>
</tr>
<tr>
<td>It’s in poor taste for companies to advertise their partnerships to airlines right now</td>
<td>48%</td>
</tr>
<tr>
<td>I don’t want to see companies launching any new advertising or promotions at this time</td>
<td>47%</td>
</tr>
<tr>
<td>This is the wrong time for companies to advertise to me to buy their products/services</td>
<td>46%</td>
</tr>
<tr>
<td>Canadian companies that do nothing during this crisis will lose a customer in me</td>
<td>46%</td>
</tr>
<tr>
<td>I don’t want to see companies launching any new products or services at this time</td>
<td>41%</td>
</tr>
<tr>
<td>I don’t mind if companies continue as if it’s business as usual</td>
<td>34%</td>
</tr>
</tbody>
</table>

#### On personal finances

<table>
<thead>
<tr>
<th>Statement</th>
<th>% Agree (Strongly agree or Agree)</th>
</tr>
</thead>
<tbody>
<tr>
<td>I’m holding off making any new investments</td>
<td>77%</td>
</tr>
<tr>
<td>I’m concerned about my employer’s ability to keep paying me</td>
<td>44%</td>
</tr>
<tr>
<td>Investors are over-reacting to the outbreak</td>
<td>40%</td>
</tr>
</tbody>
</table>

Base: TOTAL applicable (n=various)

Q: How likely are you to do any of the following related to your finances as a result of the coronavirus?
Perceptions of Going Out

<table>
<thead>
<tr>
<th>Location</th>
<th>I'm fine with it</th>
<th>I would go cautiously</th>
<th>I avoid it</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grocery stores</td>
<td>33%</td>
<td>59%</td>
<td>8%</td>
</tr>
<tr>
<td>Retail (in store) shopping</td>
<td>19%</td>
<td>45%</td>
<td>36%</td>
</tr>
<tr>
<td>Restaurants</td>
<td>14%</td>
<td>35%</td>
<td>51%</td>
</tr>
<tr>
<td>Malls</td>
<td>13%</td>
<td>28%</td>
<td>59%</td>
</tr>
<tr>
<td>Movie Theaters</td>
<td>9%</td>
<td>19%</td>
<td>72%</td>
</tr>
<tr>
<td>Airports</td>
<td>10%</td>
<td>22%</td>
<td>68%</td>
</tr>
</tbody>
</table>

Base: TOTAL (n=1,002)
Q: As a result of the coronavirus, how do you feel about going to...

May 4-5, 2020

<table>
<thead>
<tr>
<th></th>
<th>Apr 27-28</th>
<th>Apr 20-21</th>
<th>Apr 6-7</th>
<th>Apr 23-24</th>
<th>Mar 16-17</th>
</tr>
</thead>
<tbody>
<tr>
<td>Perceptions of Going Out</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Grocery stores</td>
<td>-2</td>
<td>10%</td>
<td>12%</td>
<td>14%</td>
<td>13%</td>
</tr>
<tr>
<td>- Retail (in store) shopping</td>
<td>-6</td>
<td>42%</td>
<td>47%</td>
<td>64%</td>
<td>62%</td>
</tr>
<tr>
<td>- Restaurants</td>
<td>-11</td>
<td>62%</td>
<td>68%</td>
<td>82%</td>
<td>83%</td>
</tr>
<tr>
<td>- Malls</td>
<td>-7</td>
<td>66%</td>
<td>70%</td>
<td>85%</td>
<td>85%</td>
</tr>
<tr>
<td>- Movie Theaters</td>
<td>-5</td>
<td>77%</td>
<td>82%</td>
<td>92%</td>
<td>92%</td>
</tr>
<tr>
<td>- Airports</td>
<td>-6</td>
<td>74%</td>
<td>78%</td>
<td>89%</td>
<td>91%</td>
</tr>
</tbody>
</table>
Changes in Lifestyle (Leisure & Transit)

**Doing More of This (Compared to 2 Weeks Ago)**

- Video calls with people (e.g. Skype): 52%
- Watching streaming TV (e.g. Netflix): 42%
- Making meals/baking at home: 39%
- Surfing the internet: 39%
- On social media (e.g. Facebook, Twitter): 38%
- Trying new recipes: 38%
- Playing video games: 37%
- Watching cable TV: 30%
- Listen to podcasts: 25%
- Texting with people: 25%
- Renting movies: 21%
- Listen to radio: 18%
- Driving: 11%
- Use ride-hailing companies (e.g. Uber or Lyft): 11%
- Take transit: 6%

**Doing Less of This**

- Video calls with people (e.g. Skype): 6%
- Watching streaming TV (e.g. Netflix): 5%
- Making meals/baking at home: 4%
- Surfing the internet: 3%
- On social media (e.g. Facebook, Twitter): 6%
- Trying new recipes: 7%
- Playing video games: 7%
- Watching cable TV: 8%
- Listen to podcasts: 16%
- Texting with people: 7%
- Renting movies: 18%
- Listen to radio: 21%
- Driving: 50%
- Use ride-hailing companies (e.g. Uber or Lyft): 51%
- Take transit: 66%

Base: TOTAL applicable (n=various)

Q: Compared to **two weeks ago**, have you been doing any of the following more or less?
Changes in Lifestyle (Grocery)

Have Done
(Within the last 2 Weeks)

- Buying more food so that you don’t need to go to the grocery store as often: 61%
- Buy extra food for the longer term: 38%
- Buy extra hygiene products (e.g. hand sanitizer, toilet paper): 20%
- Buy healthier food (e.g. to boost your immunity): 21%
- Get someone else to go grocery shopping for me: 17%
- Avoided purchasing goods from countries that have been affected by Coronavirus: 10%
- Buy extra single use foods (e.g. single serve yoghurt or drink boxes): 8%
- Other (specify): 2%
- No, I have not: 21%

Base: TOTAL (n=1,002)

Q: Within the last two weeks have you done any of the following related to food/grocery shopping as a result of the coronavirus?
Telecom Satisfaction

Satisfaction with...
(very satisfied/satisfied)

- Cellphone service: 91% very satisfied, 85% satisfied, 9% dissatisfied
- Telecom customer service: 32% very satisfied, 59% satisfied, 9% dissatisfied
- Reliability of home internet: 21% very satisfied, 64% satisfied, 15% dissatisfied
- Satisfaction with...

Base: TOTAL if applicable (n=various)
Q: Over the last two weeks, how satisfied have you been with your...
Q: Have you experienced any issues with your internet connectivity over the last two weeks?
Avoiding Flights

No Chance of Taking a Flight

Mar 16-17  Mar 23-24  Mar 30-31  Apr 6-7  Apr 13-14  Apr 20-21  Apr 27-28  May 4-5

Base: TOTAL (n=1,002)
Q: How likely are you to do any of the following in the next 4 weeks?

Mar 16-17  Mar 23-24  Mar 30-31  Apr 6-7  Apr 13-14  Apr 20-21  Apr 27-28  May 4-5
Take a flight within Canada  84%  84%  84%  84%  84%  84%  84%  84%
Take a flight within US  84%  84%  84%  84%  84%  84%  84%  84%
Take a flight outside Canada & US  82%  82%  82%  82%  82%  82%  82%  82%

Leisure
Business
Take a flight within Canada  75%  75%  75%  75%  75%  75%  75%  75%
Take a flight within US  78%  78%  78%  78%  78%  78%  78%  78%
Take a flight outside Canada & US  84%  84%  84%  84%  84%  84%  84%  84%

Take a flight within Canada  78%  78%  78%  78%  78%  78%  78%  78%
Take a flight within US  84%  84%  84%  84%  84%  84%  84%  84%
Take a flight outside Canada & US  84%  84%  84%  84%  84%  84%  84%  84%

No chance  Unlikely  Likely/already done
For more information please contact

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