COVID-19

Weekly Monitoring of Canadian Perceptions & Behaviour

WAVE 13

June 10, 2020





Next report will be available: Wednesday June 17

Methodology



STUDY



৵

FIELD DATES



SAMPLE

 $\sqrt{2}$



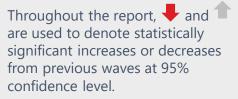
NOTE

 $\sqrt[n]{}$

 $\sqrt[n]{}$

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. 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 7: April 27-28, 2020 Wave 8: May 4-5, 2020 Wave 9: May 11-12, 2020 Wave 10: May 19-20, 2020 Wave 11: May 25-26, 2020 Wave 12: June 1-2, 2020 Wave 13: June 8-9, 2020 Field date for the next wave Monday June 8st. 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 Wave 9: n=1,003, Wave 10: n=1,510 Wave 11: n=1,008, Wave 12: n=1,005 Wave 13: n=1,007

For this most recent wave, a representative sample of n=1,007 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 \pm 3.1%, 19 times of out 20.



Tracking data shown in text on the right side of charts omits March 30-31, April 13-14, April 27-28, May 11-12 waves, and May 19-20 waves.

5 Things You Should Know

01

02

03

04

05

Lowest levels of concern more optimism in Canada: Since tracking began, the proportions of "extreme"/"very" stressed Canadians started at roughly 34%. Now, this proportion is half of that, and two-in-five Canadians instead report that they are "not very"/"not at all" stressed. In tandem, 86% now see things getting better (as opposed to worse), its highest level since measurement began. This outlook is not so rosy around the world, however. Globally, cases continue to escalate and only 58% of Canadians say things are getting better with the remaining 42% saying things are getting worse.

The economy outweighs the health crisis: For the last four weeks, the proportion who are focusing on the economy (instead of the health crisis) has consistently grown. Whereas last week, these two measures were tied, this week, we see the economy pull ahead for the first time.

Time to open up businesses: The sentiment that we need to open up businesses continues to rise week over week. Canadians are also ready to frequent their favourite businesses with lowest ever levels of those who would avoid retail, restaurants, malls, movies, airports and live sporting events

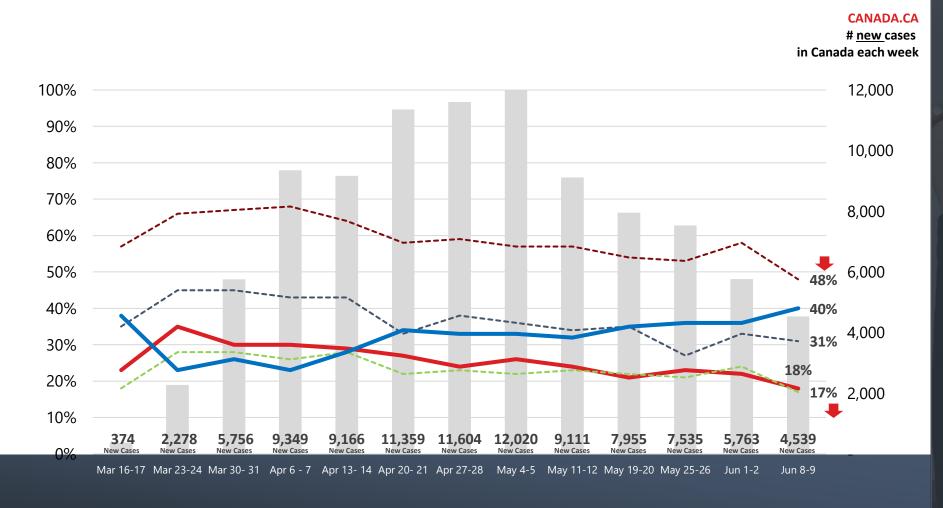
Travel plans are shifting to within the province: While the bulk of Canadians say that they are likely to maintain their summer plans, clearly these plans are changing due to the pandemic with a large proportion opting for staycations or travel plans within their province.

Canadians are giving less: Generally speaking, the proportion of Canadians who donate to charity each year hovers around two-thirds. We are now seeing that Canadians are pulling back on their donations with only 46% reporting that they gave money to a charity. Among those who donated recently due to the pandemic, food banks and food security related causes are what they are most focused on.



Key Findings

Level of Stress from COVID-19 Pandemic





<u>Concern about Getting Sick</u> (Extremely, very concerned)



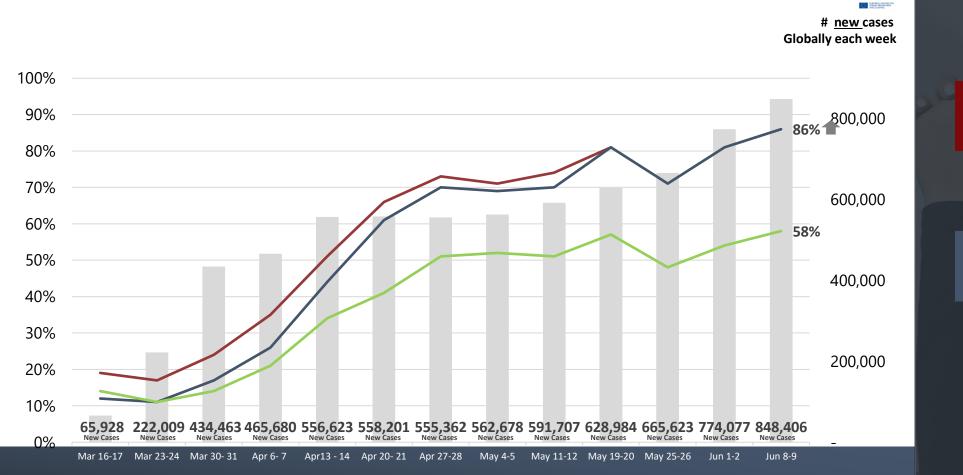


Base: TOTAL (n=1,007)

ANGUS REID

Questions that matter

Q: Generally speaking, how would you describe your level of stress, if any, about the coronavirus outbreak? Base: TOTAL applicable (n=various) Q: How concerned are you about . .



Are Things Getting Better or Worse?

June 8-9, 2020

Are things getting better or worse?



86% Better



ecoc

Worldwide 42% Worse 58% Better

Better – around the world Better – in Canada



06 PAGE

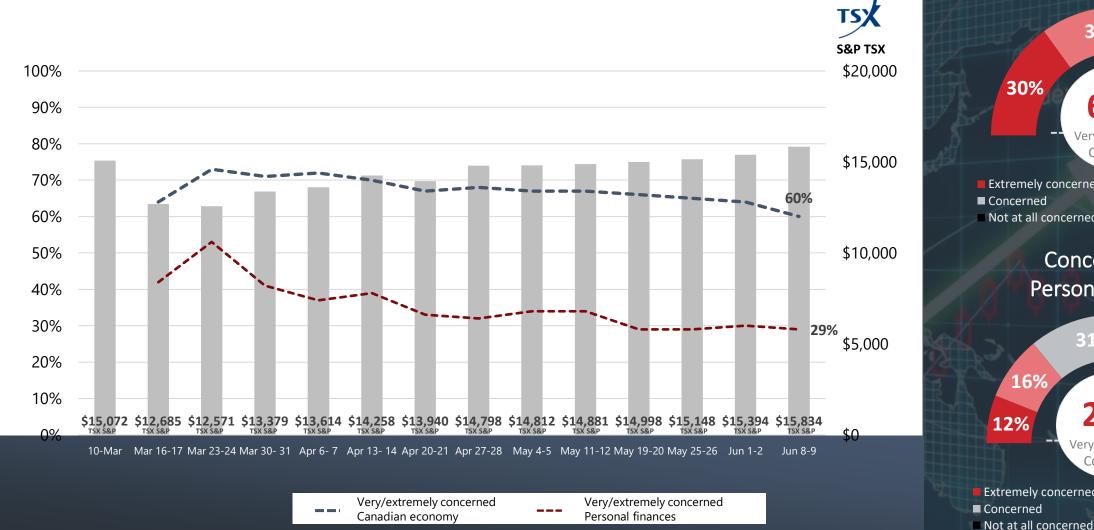
COVID-19 Perceptions

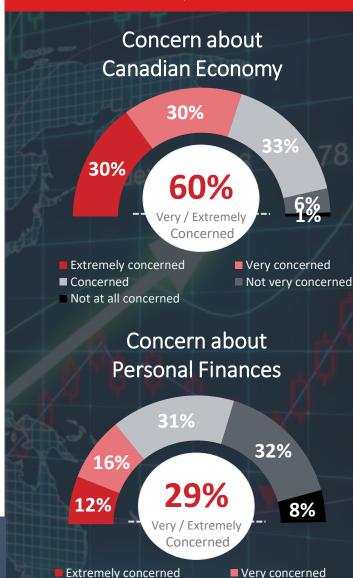
<u>% Agree</u> (Strongly agree or Agree) Things are going to get worse before they get 58% better It's time for things to go back to normal 48% The health risk of the coronavirus has been 30% overblown





Financial Concern





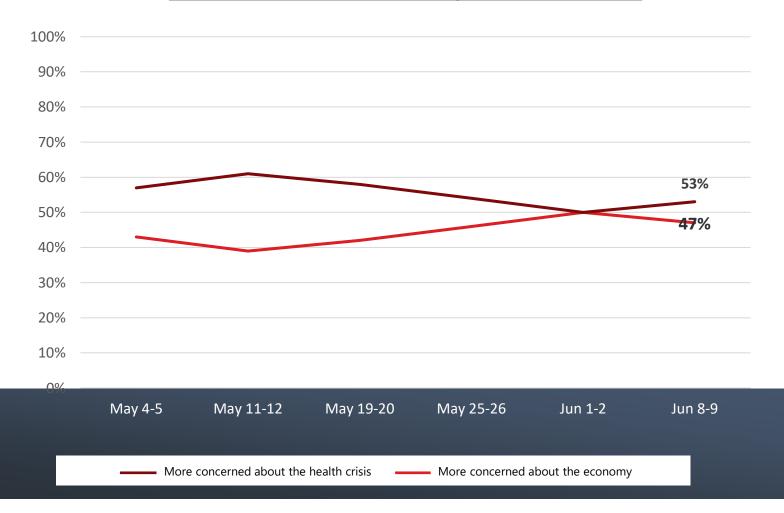
June 8-9, 2020

ANGUS REID O

Base: TOTAL (n=1,007) 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? Not very concerned

Concern Over Economy versus Health Crisis During Pandemic

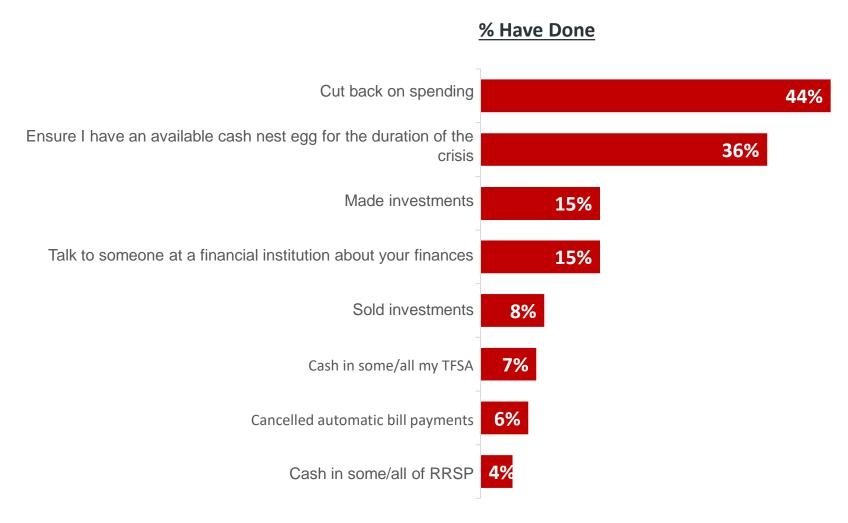
<u>% Concerned About the Economy vs. the Health Crisis</u>





June 8-9, 2020

Financial Actions Taken as a Result of COVID-19



May 19-20, 2020 Jun May May Mar Mar Δ Apr Apr 19-20 4-5 20-21 6-7 23-24 16-17 1-2 last week 40% 37% 40% 42% 38% 39% 24% +4 -2 38% 35% 33% 34% 37% 31% 27% -5 🖊 20% 13% 16% 17% 14% 8% 6% 15% 13% 16% 16% 15% 11% 9% = 8% 9% 7% 8% 7% 6% 4% = +1 6% 5% 4% 6% 4% 5% 4% 6% 5% 7% 6% 7% 6% 3% = 4% 4% 5% 4% 5% 2% 2% =



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

Perceptions of Advertising and Finances

On advertising & business . . .

<u>% Agree</u> (Strongly agree or Agree)

Now is the time to start stimulating our economy back to health	78%
It's about time the government starts re-opening public places (like parks)	
Canadian companies that take an active role during this crisis will have gained a loyal customer in me	
It's reassuring to hear from Canadian companies at this time	
It's about time the government starts re-opening businesses	70%
It's in poor taste for airline companies to advertise right now	50%
My bank (or primary financial institution) has my back during this crisis	48%
I don't mind if companies continue as if it's business as usual	46%
Canadian companies that do nothing during this crisis will lose a customer in me	43%
It's in poor taste for companies to advertise their partnerships to airlines right now	42%
This is the wrong time for companies to advertise to me to buy their products/services	36%
I don't want to see companies launching any new advertising or promotions at this time	36%
I don't want to see companies launching any new products or services at this time	29%
On personal finances I'm holding off making any new investments	68%
Investors are over-reacting to the outbreak	40%
I'm concerned about my employer's ability to keep paying me	36%

June 8-9, 2020								
∆ last week	Jun 1-2	May 25-26	May 4-5	Apr 20-21	Apr 6-7	Mar 23-24	Mar 16-17	
+2	76%	69%	64%	52%	51%	54%	-	
+7	68%	58%	55%	-	-	-	-	
-4	77%	79%	79%	82%	86%	-	-	
-3	76%	80%	77%	80%	80%			
+6	64%	58%	49%	-	-	-	-	
-4	54%	57%	57%	61%	67%	73%	65%	
-5	53%	47%	49%	53%	48%	-	-	
+3	43%	41%	34%	35%	29%	20%	42%	
=	43%	50%	46%	46%	57%	-	-	
+1	41%	49%	48%	52%	57%	61%	56%	
-2	38%	39%	46%	52%	54%	65%	58%	
-2	38%	40%	47%	52%	54%	64%	60%	
-1	30%	34%	41%	48%	49%	61%	57%	
-1	69%	72%	77%	76%	81%	85%	77%	
+1	39%	43%	40%	41%	38%	42%	56%	
-6	42%	41%	44%	43%	52%	58%	49%	



Base: TOTAL applicable (n=various)

Q: To what extent do you agree or disagree with the following statements about the coronavirus?

Perceptions of Advertising During the Pandemic



Now is the time to start stimulating our economy back to health

This is the wrong time for companies to advertise to me to buy their products/services

I don't want to see companies launching any new products or services at this time

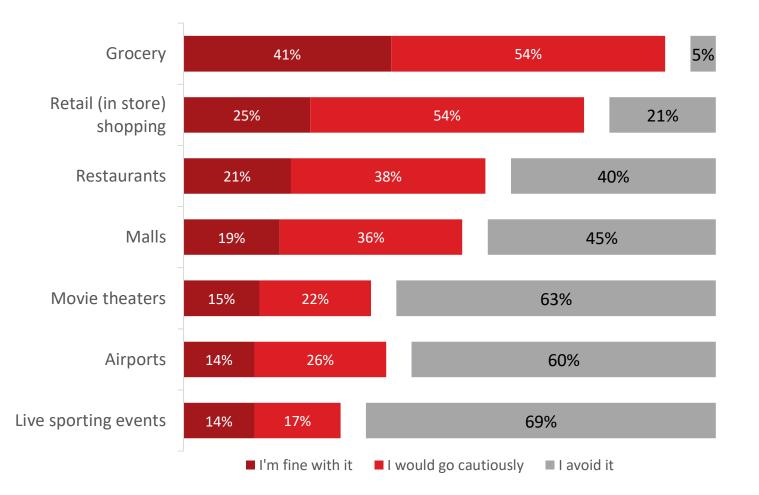
June 8-9, 2020

ANGUS REID O Questions that matter.

Base: TOTAL (n=1,007)

Q: To what extent do you agree or disagree with the following statements about the coronavirus? Q: Which of the following statements do you agree with most when it comes to company communications during the COVID-19 pandemic?

Perceptions of Going Out



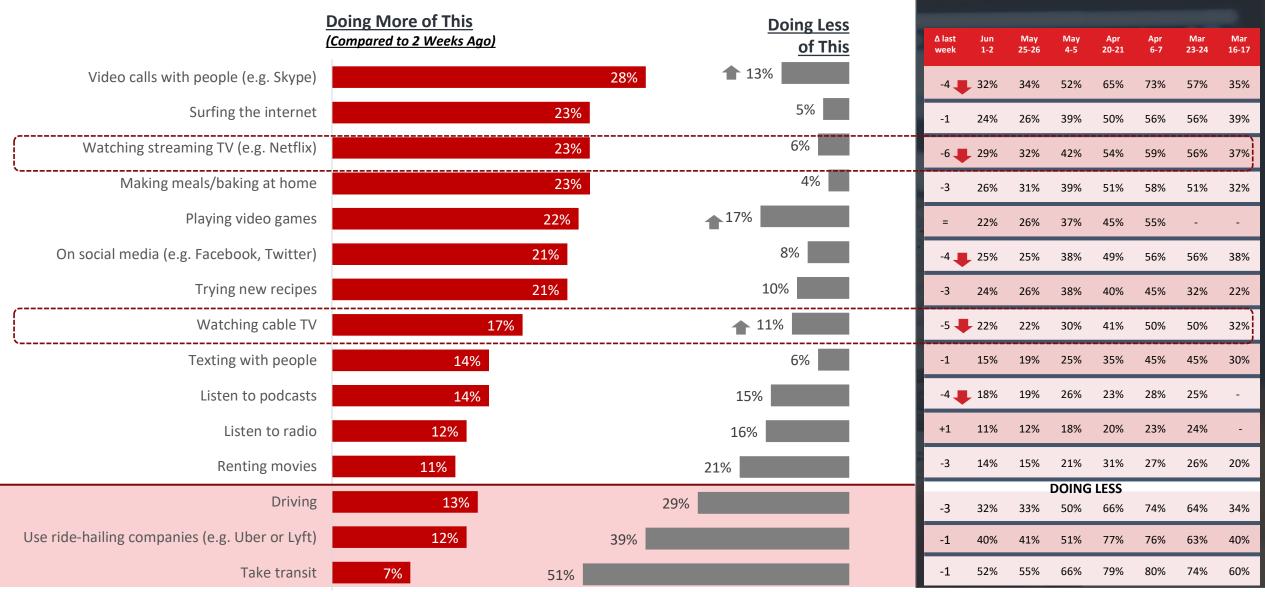




June 8-9, 2020

DOING MORE

Changes in Lifestyle (Leisure & Transit)





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 Buy extra food for the longer term 29% Buy extra hygiene products (e.g. hand sanitizer, toilet 23% paper) Buy healthier food (e.g. to boost your immunity) 20% Get someone else to go grocery shopping for me 12% Avoided purchasing goods from countries that have been 11% affected by Coronavirus Buy extra single use foods (e.g. single serve yoghurt or 5% drink boxes) 1% Other (specify) No, I have not 29%

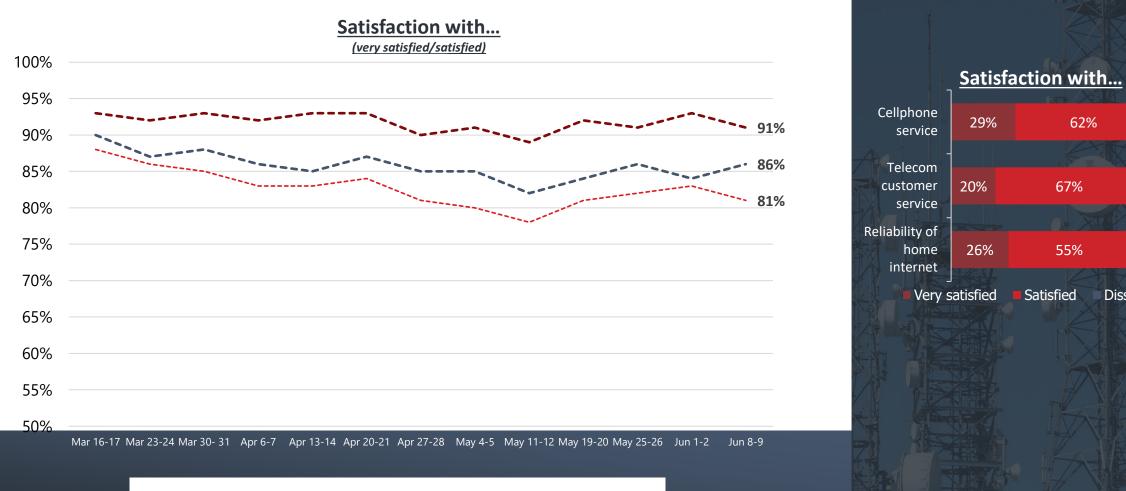
Jun 8-9, 2020 ∆ last May Mar Mar May Apr Apr week 25-26 4-5 20-21 6-7 23-24 16-17 -2 54% 61% 59% 71% 60% 48% -2 31% 38% 32% 50% 42% 36% 23% 20% 22% 29% 26% 23% = 23% -3 21% 14% 22% 20% 15% 13% 17% 20% 15% 6% -1 17% 9% 9% 8% 6% +2 10% 8% -3 8% 6% 9% 9% 8% 8% 2% 2% 5% 3% 2% 2% -1 +2 27% 21% 24% 15% 22% 36%

52%



Telecom Satisfaction

June 8-9, 2020



Internet reliability **___** Customer Service ---- Cellphone reliability

ANGUS REID O Questions that matter

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?

62%

67%

55%

Satisfied

9%

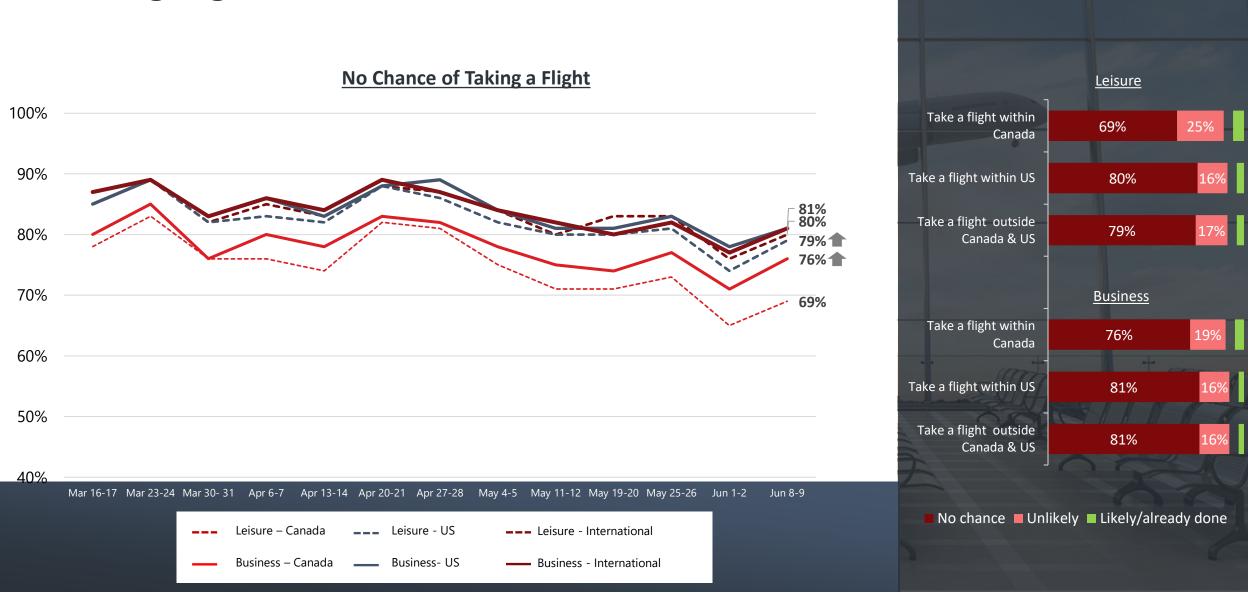
13%

19%

Dissatisfied

Avoiding Flights

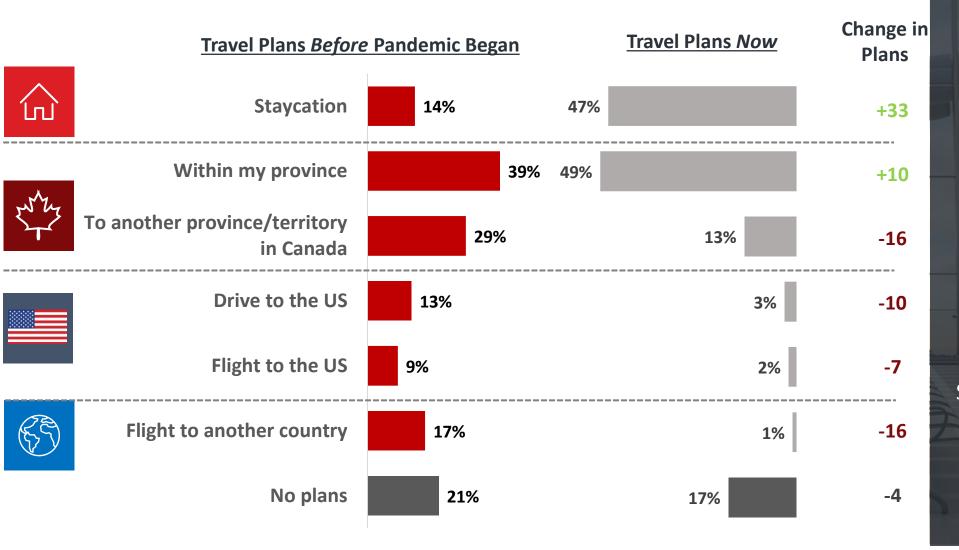
June 8-9, 2020





Summer Travel/Leisure Plans

June 8-9, 2020



79%

Had summer travel plans <u>before</u> the pandemic

83%

Still have summer travel plans



Base: TOTAL (n=1,007) Q: Before the pandemic started, did you have plans to travel for leisure/vacation for this summer? Q: And now, what are your current plans for this summer?

Charitable Donations

June 8-9, 2020

Nov

2019

64%

42%

20%

15%

4%

17%

Δ

-18

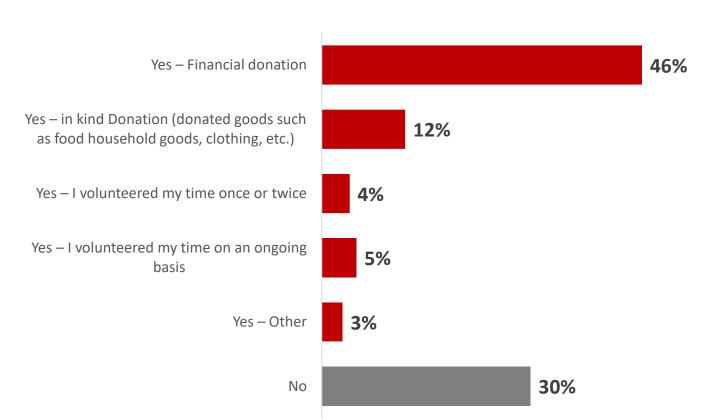
-30

-16

-10

-1

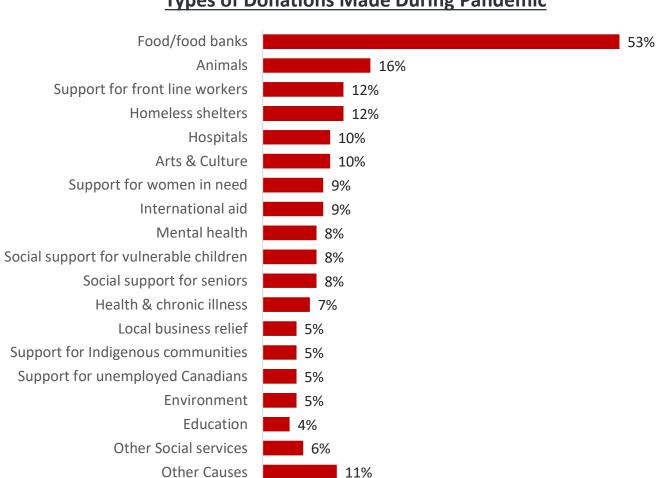
+13



Charitable Donations Past 12 Months

ANGUS REID O Questions that matter. Questions that m

Charitable Donations During the Pandemic



Types of Donations Made During Pandemic



Base: TOTAL (n=1,007) Q: Have you made a charitable donation since the pandemic began in early March? Base: Made charitable donation(s) due to pandemic (n=247) Q: What types of charitable donations did you make due to the pandemic? June 8-9, 2020

52%

Have made a donation since the start of March

Types of Donations Made Since Start of March

Financial donation I made due to the pandemic	17%
Financial donation I would have made anyways	31%
In kind donation I made due to the pandemic	8%
In kind donation I would have made anyways	9%
None	48%

For more information please contact

Demetre Eliopoulos

SVP & Managing Director, Public Affairs demetre.eliopoulos@angusreid.com 705.465.0411

