COVID-19

Weekly Monitoring of Canadian Perceptions & Behaviour

WAVE 4

APRIL 8, 2020





Next report will be available: Wednesday April 15

Methodology





STUDY

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FIELD DATES



SAMPLE

 $\sqrt{}$



NOTE

confidence level.

 $\sqrt[n]{}$

 \checkmark

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

Field date for the next wave Monday April 13th.

Wave 1: n=1,514 Wave 2: n=1,004 Wave 3: n=1,006 Wave 4: n=1,007

For this most recent wave, a representative sample of n=1,007Canadian 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. Throughout the report, and are used to denote statistically significant increases or decreases from previous waves at 95%



5 Things You Should Know

01

02

03

04

05

Canadians have settled into their new reality. Over the last couple of waves, we've seen levels of stress and concern (over both safety and finances) have stabilized. Even though there is widespread agreement that things will get worse before they get better, Canadians are displaying some stoicism in that their stress is <u>not</u> rising as Covid-19 cases rise dramatically in Canada.

Even though cases continue to rise in Canada, more Canadians are feeling optimistic. While still the vast minority, a growing proportion of Canadians are saying that things are getting better across the globe, across Canada and in their communities. This comes at a time when the number of Covid-19 cases in Canada has over doubled since last week.

Feeding the country – Canadians are stocking their fridge, ordering online and cooking more. Canadians also seem to be entering a new routine when it comes to food. One-in-five are using "click and go" grocery shopping (doubling since the first wave of tracking). Canadians are also buying more so they also have to go shopping less. Finally, Canadians are taking this opportunity to cook more with almost half saying that they're trying new recipes.

Three-quarters of online Canadians engage in video calls. Since the start of tracking, the most dramatic change in behaviour is the use of video calls. Three-quarters of Canadians who engage in this practice say they are doing it more than they did four weeks ago.

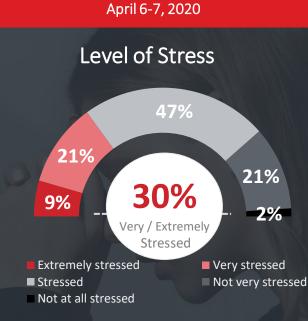
It is important for Canadian companies to engage. While Canadians are still divided on the appropriateness of advertising, they still want to see Canadian companies engage in the issue. Canadians overwhelmingly state that those companies who take an active role during this crisis will be rewarded with their loyalty as a customer. Conversely, a majority say that companies who do nothing at this time will lose them as a customer.



Key Findings

Level of Stress from COVID-19 Pandemic





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





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...



PAGE

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

Questions that matter

COVID-19 Perceptions <u>% Agree</u> (Strongly agree or Agree) Things are going to get worse before they get 92% better My workplace is responding well to the situation 82% It's time for things to go back to normal 32% It's business as per usual for me 19% The health risk of the coronavirus has been 14% overblown



April 6-7, 2020

Mar

23-24

94%

78%

34%

19%

14%

Mar

16-17

92%

78%

44%

33%

28%

Mar

30-31

93%

78%

34%

22%

14%

 Δ last

week

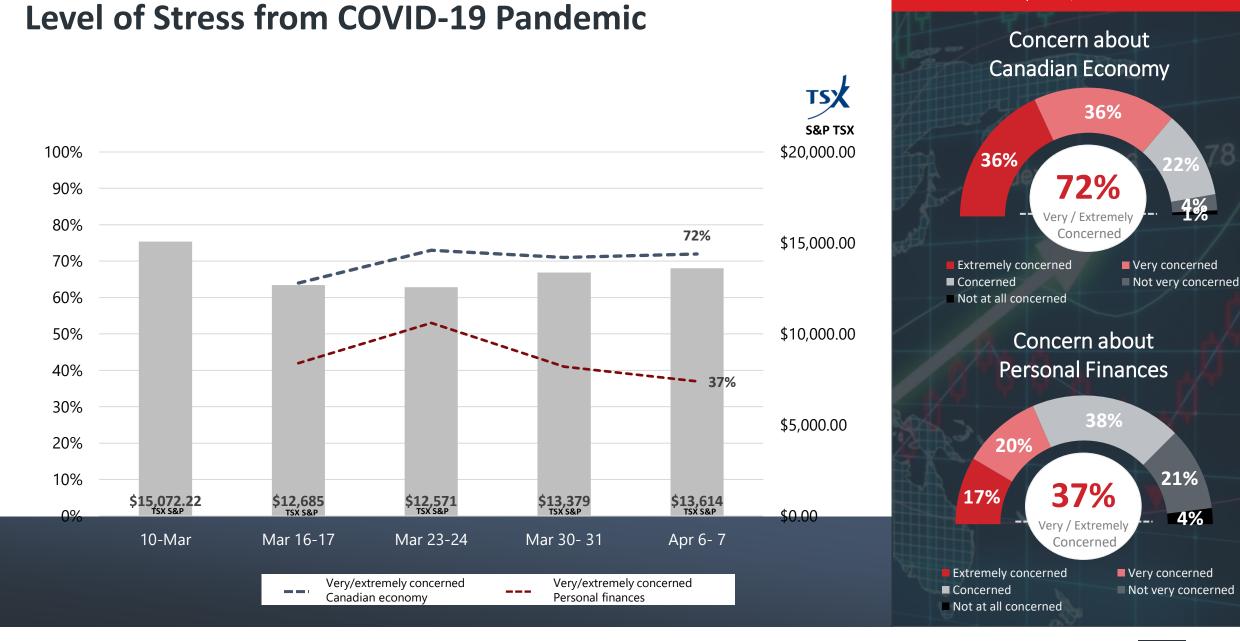
-1

+4

-2

-3

=



Base: TOTAL (n=1,007) ANGUS REID O

Questions that matter

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?

4%

April 6-7, 2020

Financial Actions Taken as a Result of COVID-19

∆ last week	Mar 30- 31	Mar 23-24	Mar 16-17
-1	39%	39%	24%
1		10	and the second
+3	34%	31%	27%
			11
+1	14%	11%	9%
11E			No.
=	14%	8%	6%
4	Kej (s		100
-1	8%	6%	4%
1	1000		
-3	7%	5%	4%
1		A STATE WIT	
=	7%	6%	3%
+1	4%	2%	2%

38%

37%

% Have Done Cut back on spending Ensure I have an available cash nest egg for the duration of the crisis Talk to someone at a financial institution about your finances Made investments 115% Sold investments 7%

Cancelled automatic bill payments Cash in some/all of RRSP



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

7%

5%

Cash in some/all my TFSA 4%

Perceptions of Advertising and Finances

On advertising & business	<u>% Agree</u> (Strongly agree or Agree)
Canadian companies that take an active role during this crisis will have gained a loyal customer in me	
Generally speaking, Canadian companies are doing a great job of responding to this crisis	
It's reassuring to hear from Canadian companies at this time	
It's in poor taste for airline companies to advertise right now	67%
Canadian companies that do nothing during this crisis will lose a customer in me	
It's in poor taste for companies to advertise their partnerships to airlines right now	57%
This is the wrong time for companies to advertise to me to buy their products/services	54%
I don't want to see companies launching any new advertising or promotions at this time	54%
Now is the time to start stimulating our economy back to health	51%
I don't want to see companies launching any new products or services at this time	49%
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	29%
I'm holding off making any major purchases	
I'm holding off making any new investments	
I'm concerned about my employer's ability to keep paying me	52%
Investors are over-reacting to the outbreak	38%

April 6-7, 2020 Mar Mar Ma 0- 31 23-24 16-1

∆ last week	Mar 30- 31	Mar 23-24	Mar 16-17
na	-	-	-
+1	82%	80%	-
na	-	-	-
+2	65%	73%	65%
na	-	-	-
+3	54%	61%	56%
-3	57%	65%	58%
-3	57%	64%	60%
+1	50%	54%	
-5	54%	61%	57%
=	48%		
-1	30%	20%	42%
=	87%	90%	80%
-1	82%	85%	77%
-2	54%	58%	49%
-4	42%	42%	56%

86%

87%

81%

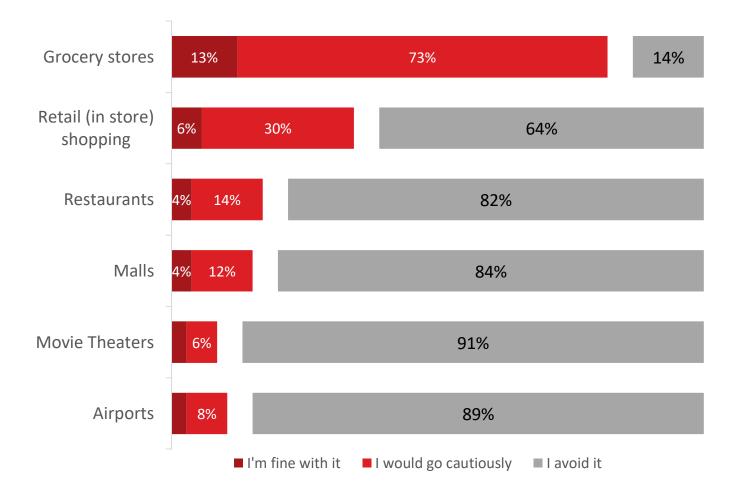
83%

80%



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

Perceptions of Going Out



April 6-7, 2020 AVOID Mar Mar Mar **Δ** last 30-31 23-24 16-17 week 7% 14% 13% = 63% 62% 44% +1 82% 83% 59% = 82% 64% +2 85% 92% 92% 80% -1 89% 91% 82% =



Use of Online Transactions/Services

Have Done (Within the last 2 Weeks) Mar Mar Mar Δ last 30-31 23-24 16-17 week Online banking 80% 83% 72% -3 79% Retail shopping online 54% +6 48% 44% 38% Restaurant takeout 37% 37% 30% 24% = Food ordering services 23% +5 18% 17% 13% Online grocery services 19% +2 17% 10% 16% None of these 10% 8% 11% 19% +2



April 6-7, 2020

April 6-7, 2020

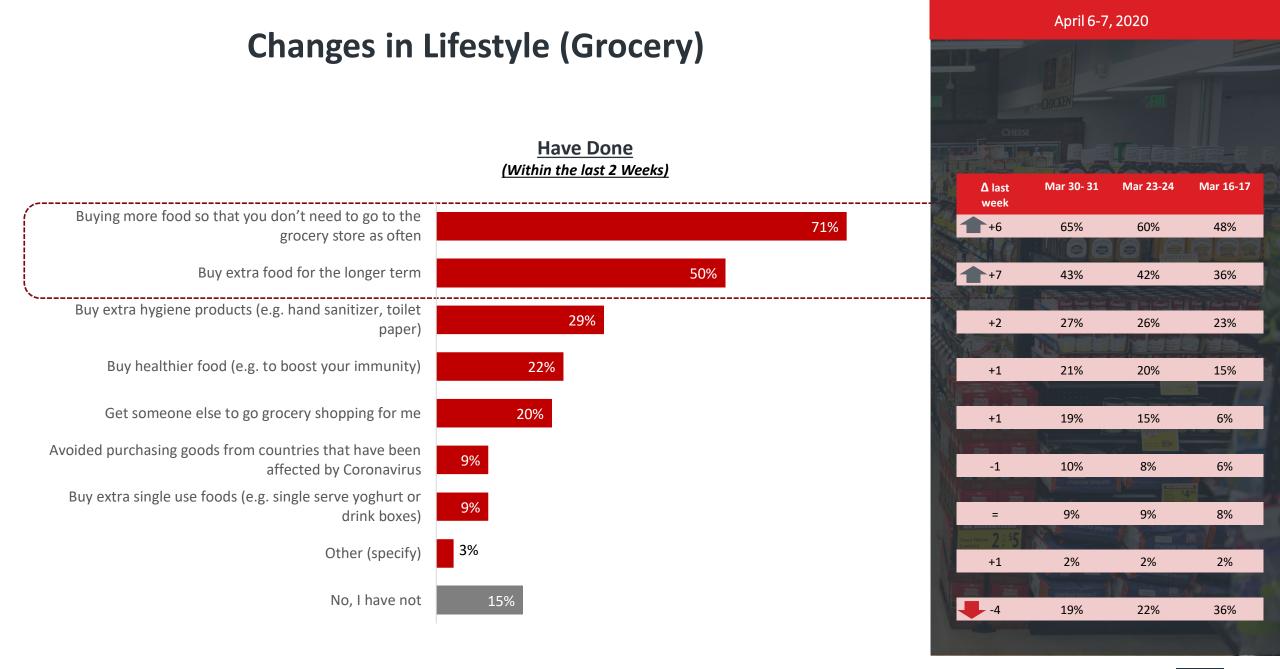
Changes in Lifestyle (Leisure & Transit)

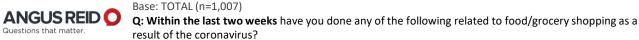
Doing More of This		Doing Less	DOING MORE			
	(Compared to 2 Weeks Ago)	<u>of This</u>	Δ last week	Mar 30- 31	Mar 23-24	Mar 16-17
Video calls with people (e.g. Skype)	73'	<mark>%</mark>	+4	69%	57%	35%
Watching streaming TV (e.g. Netflix)	59%	3%	+1	58%	56%	37%
Making meals/baking at home	58%	2%	+4	54%	51%	32%
Surfing the internet	56%	2%	+1	55%	56%	39%
On social media (e.g. Facebook, Twitter)	56%	4%	-1	57%	56%	38%
Playing video games	55%	6%	na		•	-
Watching cable TV	50%	6%	+3	47%	50%	32%
Texting with people	45%	4%	+3	42%	45%	30%
Trying new recipes	45%	5%	+6	39%	32%	22%
Listen to podcasts	28%	12%	=	28%	25%	
Renting movies	27%	14%	-3	30%	26%	20%
Listen to radio	23%	22%	-2	25%	24%	
Driving	<mark>6%</mark> 74%		+2	DOING 72%	64%	34%
Use ride-hailing companies (e.g. Uber or Lyft)	<mark>4</mark> % 76%		-+14	62%	63%	40%
Take transit	1% 80%		+1	79%	74%	60%



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 (Workplace)

	Have Done (Within the last 2 Weeks)
Worked from home	44%
My workplace has been in frequent communication with me about the coronavirus	37%
Minimize/cancel internal meetings	26%
Minimize/cancel meetings with clients	24%
Work trips have been cancelled/postponed	23%
Shortening of work shifts/fewer work hours	16%
My company has shut down	15%
Take time off	8%
Other (specify)	12%
No – I have not been impacted at my place of work	14%

April 6-7, 2020				
Δ last week	Mar 30-31	Mar 23-24	Mar 16-17	
-2	46%	38%	31%	
	-			
-1	38%	40%	39%	
			-	
=	26%	28%	24%	
			-	
-1	25%	26%	25%	
		1	-	
-2	25%	24%	27%	
-2	18%	15%	12%	
		1	-191-	
-1	14%	14%	11%	
			(and the	
+1	7%	9%	8%	
		4.004	100/	
+1	11%	16%	12%	
12	120/	1.40/	220/	
+2	12%	14%	23%	



QB5. In the last two weeks, has any of the following happened in your workplace as a result of the coronavirus?

Telecom Satisfaction

April 6-7, 2020





100%

95%

90%

85%

80%

75%

70%

65%

60%

55%

50%

Base: TOTAL if applicable (n=various)

Internet reliability

Mar 16-17

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?

___ Customer Service

Mar 23-24

Satisfaction with...

(very satisfied/satisfied)

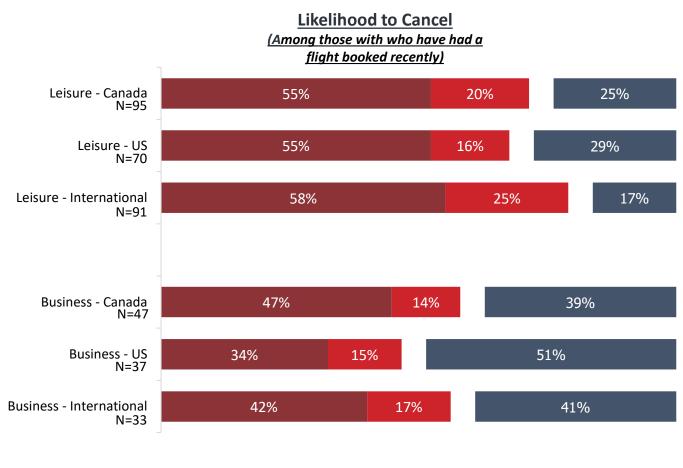
Avoiding Flights

April 6-7, 2020

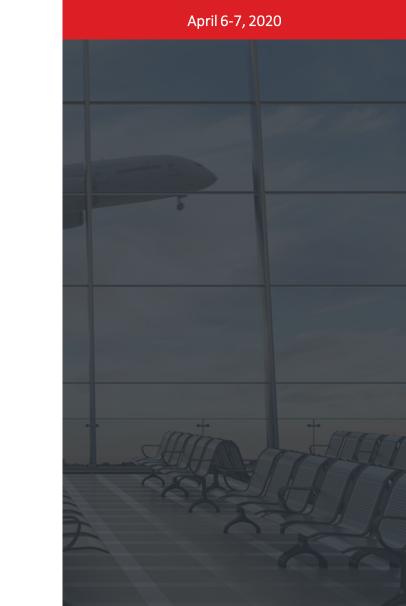




Flight Cancellations



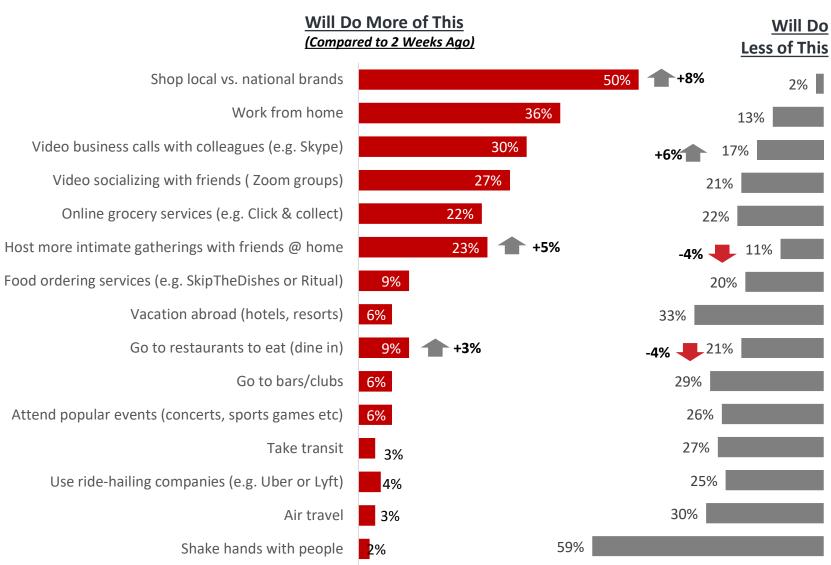
Have cancelled Likely to cancel Unlikely/no chance I'll cancel



Note: only significant changes since last week shown



When Things Are "Back To Normal"





ANGUS REID O Questions that matter. Base: TOTAL applicable (n=various)

Q: Do you think you will engage in the following more or less than you used to after things are "back to normal"

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