

**CAMP JEFFERSON**

# **HOW CANADIANS ARE FEELING**

The Impact of COVID-19 on Canadians: Week of June 22, 2020

# THIS WEEK'S HIGHLIGHTS:

## HOW CANADIANS FEEL RIGHT NOW

# 1

*Focus on re-starting commerce shifting to safe and healthy practices in businesses.*

Although fewer Canadians claim to be personally practicing social distancing and mask-wearing, they're putting onus on businesses to ensure health & safety measures: 2 in 3 are willing to forego a business completely if they don't feel that they will be safe, and nearly 7 in 10 believe businesses aren't doing enough to ensure the health and safety of patrons.

# 2

*Extreme theories about coronavirus are spreading, perpetuated by social media.*

Generally, there is not a large proportion of Canadians who believe in extreme theories: the most popular theories are believed by no more than 1 in 5. However, social platforms are showing potential to grow acceptance of these theories: those who get rely on social media as their primary sources of news are more likely to believe in or support extreme theories about the crisis.

# THIS WEEK'S HIGHLIGHTS:

## HOW CANADIANS FEEL RIGHT NOW

### 3

*Changing shopper behaviour indicates a bigger reliance on omni-channel.*

As discretionary purchases are slowly gaining steam, consumer attitudes and behaviours generally indicate that omni-channel experiences will be even more important in the future. Even as many intend to return to traditional sources of purchase in the near future (i.e. malls), the tools they use and the paths they take to make purchase decisions are significantly changing, driven by the need to rely on digital tools over the past 4 months.

### 4

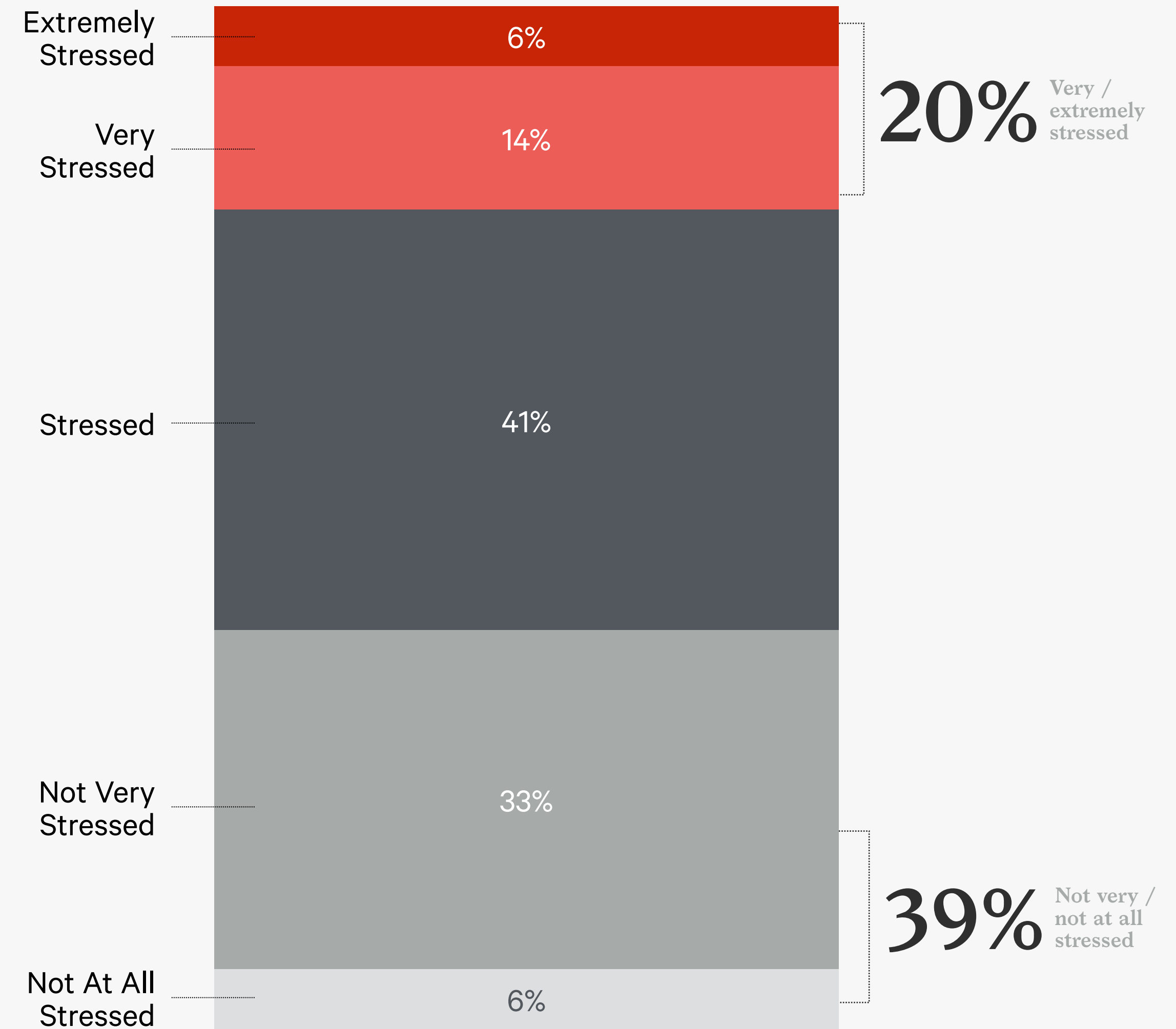
*Sentiment continues to move in favour of continuing “business as usual”.*

Canadians continue to express more openness to businesses returning to normal practices, such as releasing new ad campaigns, launching new products, or promoting offers. Relative to the proportion of the population who are still extremely worried about the crisis, it is unlikely that some of these opinions will ever reach a total consensus of agreement, but they continue to move in favour of returning to business as usual.

# GENERAL CONCERNS ABOUT THE CRISIS ARE STABLE.

For the past few weeks, Canadians overall stress levels haven't changed significantly. Overall, stress levels are trending downwards, with a larger % of people reporting that they are not stressed at all, or not very stressed. Though 1 in 5 claim that they are still very or extremely stressed, this is a proportion that has not changed significantly since May, and is 15pts lower than the high point of 35% saying they were very stressed at the beginning of the lockdowns in March.

Sources:  
Angus Reid Global, COVID-19 Weekly Monitoring of Canadian Perceptions & Behaviour, n=1,001



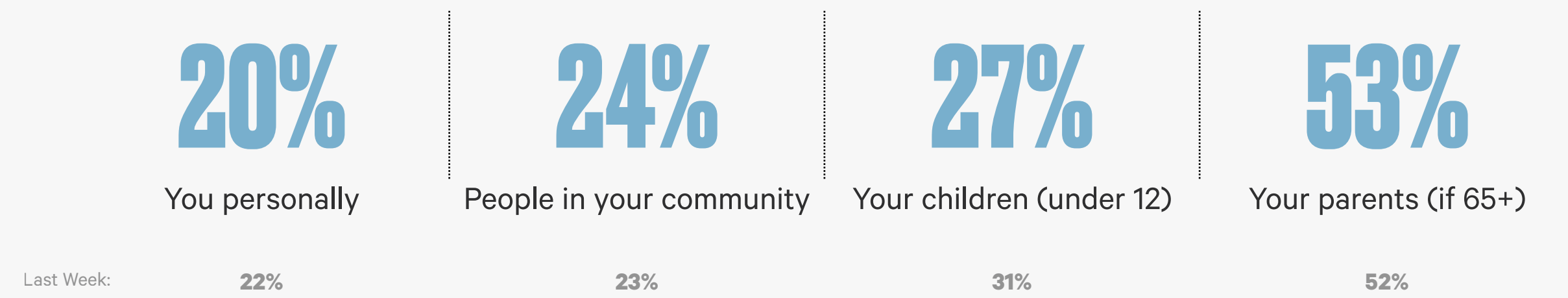
*Stress levels about COVID-19, as of June 22*

# OPTIMISM CONTINUES TO GROW AT HOME & FALL ABROAD.

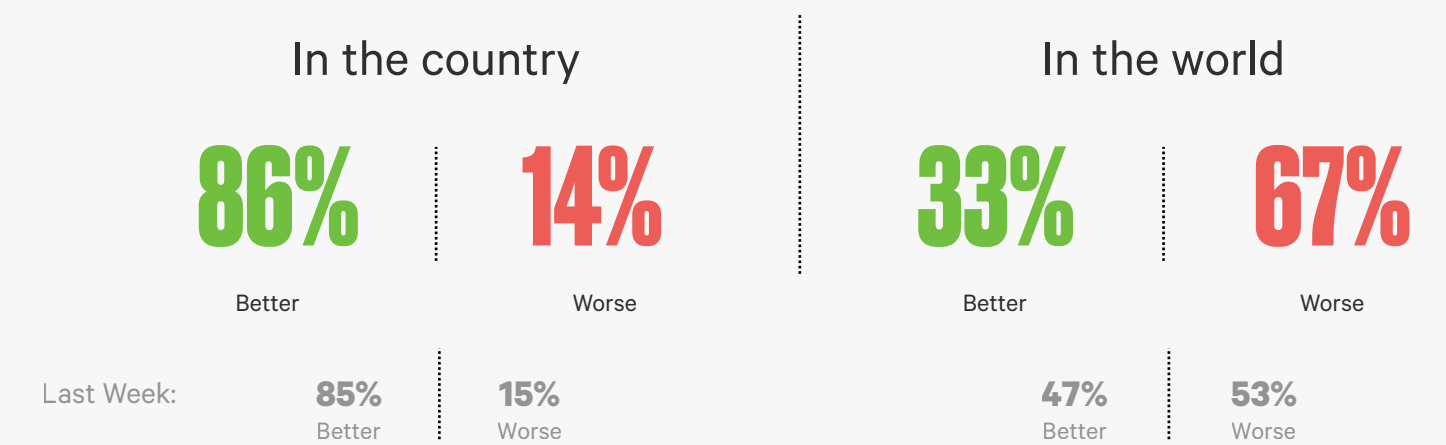
As fears about getting sick continue to fall, optimism about the crisis continues to improve domestically. However, Canadians' perception of the state of the rest of the world is not as bright. More than 2 in 3 believe that the situation is getting worse outside of Canada. Despite a growing belief that things are getting better overall, many Canadians aren't yet convinced that it's time for things to go back to normal.

Sources:  
Angus Reid Global. COVID-19 Weekly Monitoring of Canadian Perceptions & Behaviour. n=1,001

## Who are you most concerned about getting sick?



## Do people believe things are getting better or worse?



## COVID-19 Outlook



# SOCIAL MEDIA IS FUELLING EXTREME THEORIES & OPINIONS.

Generally, there is not a large proportion of Canadians who believe (or who are entertaining the idea of) extreme theories related to COVID-19. Those who get rely on social media as their primary sources of news are more likely to believe that COVID-19 is more than a naturally occurring public health crisis, and are also more likely to believe in or support more extreme theories about the crisis.

Sources:  
Maru/Blue. Emotional State of the Country: Canada. n=1,511

*Coronavirus was probably created in a laboratory*  
% believe: 23%

*Most people in the country have already had coronavirus without knowing it*  
% believe: 21%

*The number of people being reported as dying from the virus is being deliberately reduced or hidden by authorities.*  
% believe: 21%

*The coronavirus is a cover for Bill Gates to implant people with a trackable microchip*  
% believe: 6%

*There is no hard evidence that coronavirus really exists*  
% believe: 5%

*The symptoms that most people blame on coronavirus appear to be linked to 5G radiation*  
% believe: 3%

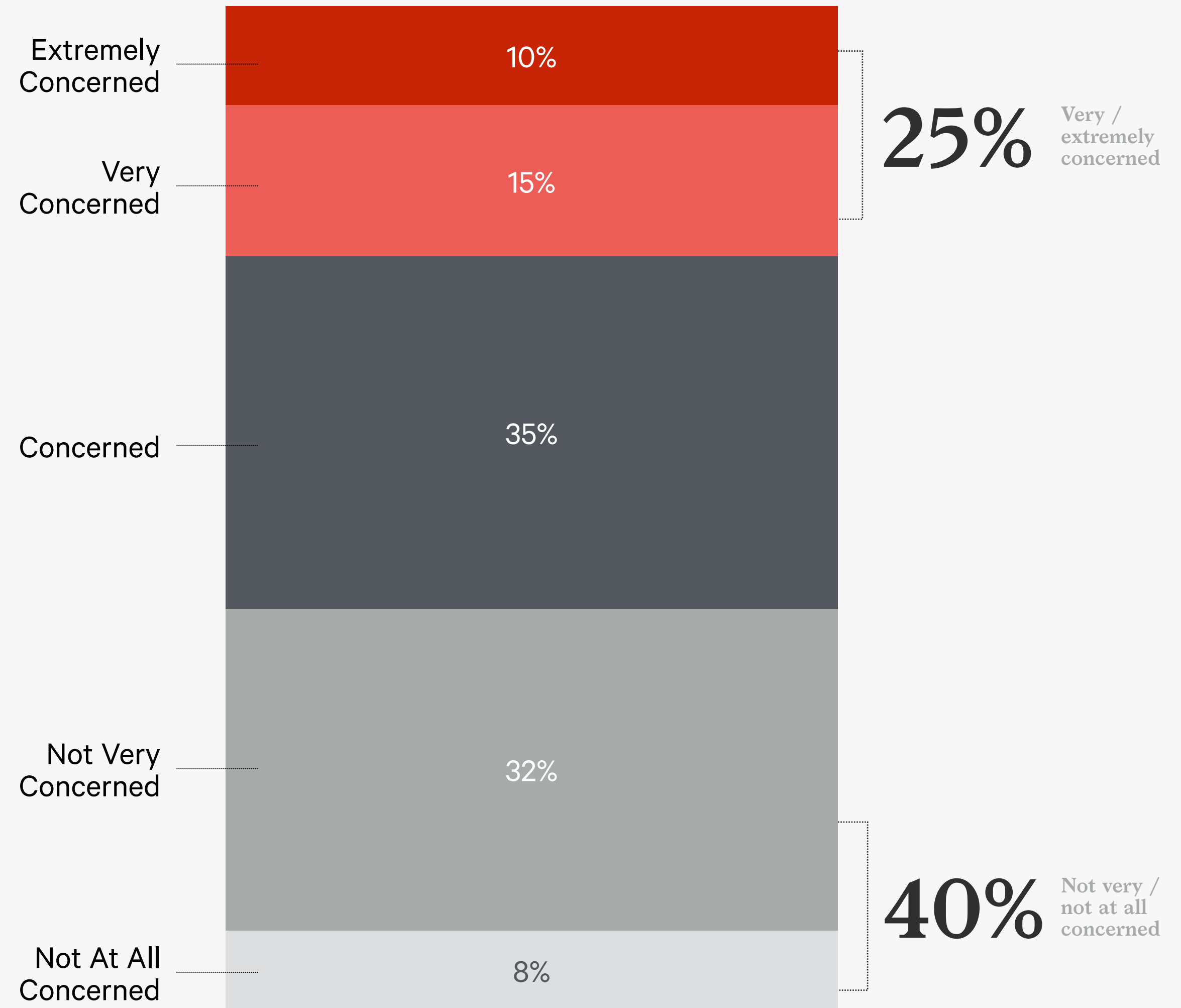




# FINANCIAL CONCERNS CONTINUE TO EASE OVER TIME.

At the beginning of June, Canadians reported that the economy was of greater importance than the health crisis. Since then, opinions have diverged slightly, but the country is still generally divided: 54% are more concerned about the health crisis, while 46% are concerned more about the economy. Outside of relative comparisons, the health of the economy is still an issue: 59% are very or extremely concerned. However, worries about personal finances are easing: only 1 in 4 now express a high degree of concern.

Sources:  
Angus Reid Global. COVID-19 Weekly Monitoring of Canadian Perceptions & Behaviour. n=1,001



*Concern about personal finances, as of June 22*

# CANADIANS WANT NORMALIZATION, BUT ARE STILL CAUTIOUS.

Though public sentiment for normalization is still at generally the same levels it has been over the past few weeks, a new tension is emerging: amidst the re-opening of businesses and public places, Canadians are sensitive to the steps being taken in these places to ensure their health and safety. Despite a desire for things to open up, many are claiming to take a “wait-and-see” approach to actually taking action: 8 in 10 claim they will delay returning to casual activities (like shopping).

**Sources:**  
Angus Reid Global. COVID-19 Weekly Monitoring of Canadian Perceptions & Behaviour. n=1,001  
Ipsos. Consumer Health & Safety Check Up. n=1,000

*Desire to normalize, by the numbers:*

72%

Believe it's time for the government to re-open public places

Last Week:  
74%

68%

Believe it's time for the government to start re-opening businesses

Last Week:  
72%

80%

Intending to delay returning to shopping once restrictions are lifted

Last Week:  
N/A

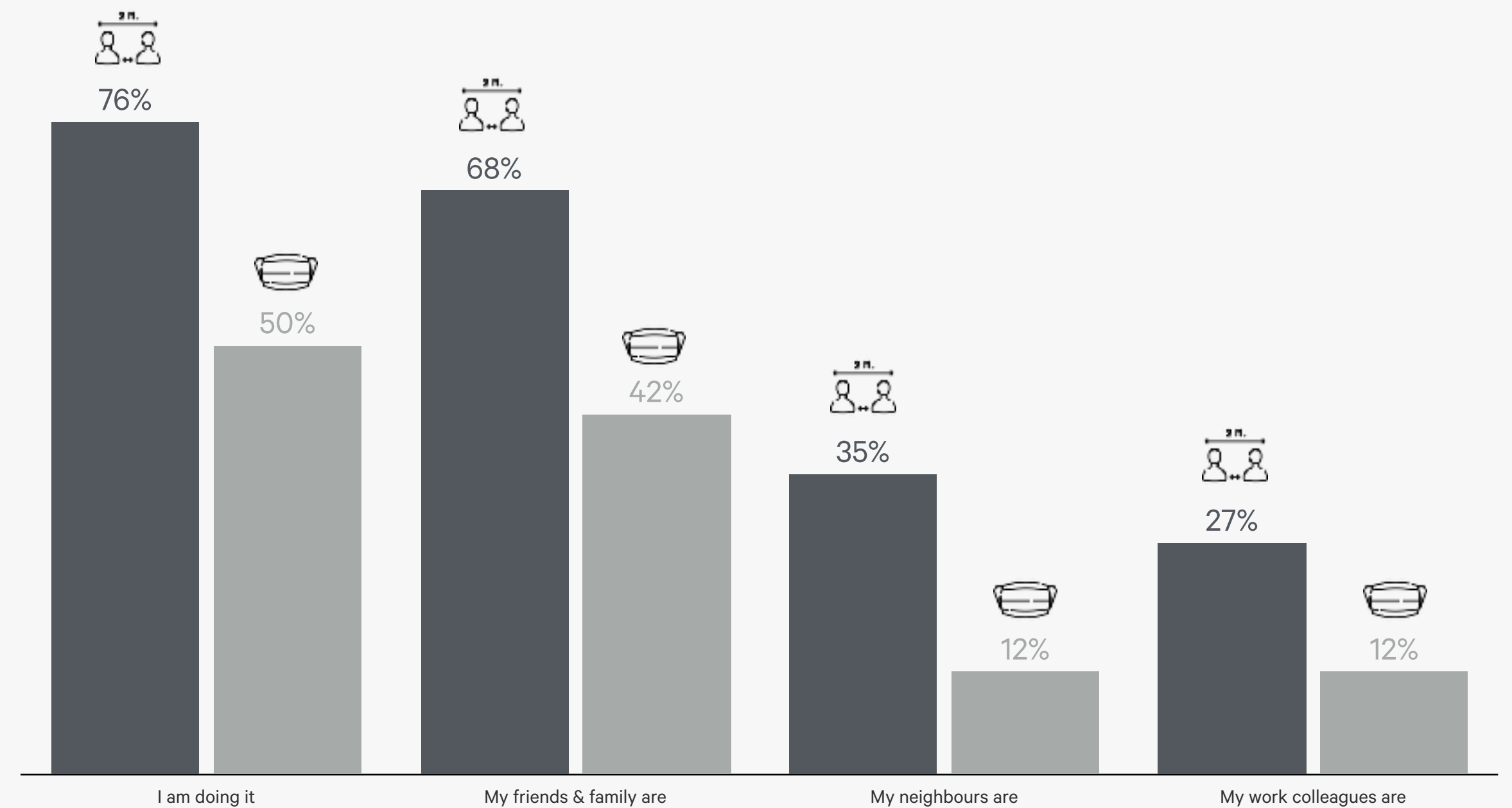


# PUBLIC HEALTH PRECAUTIONS ARE BEING PRACTICED LESS FREQUENTLY.

As reported in past reporting waves, Canadians more likely to believe that they are personally upholding model behaviour, while believing it is being practiced less in their social circles and neighbourhoods. Regardless of perceptions, fewer Canadians now claim to be practicing social distancing personally (vs. 92% at the end of March). By comparison, Canadians are less likely to be wearing a mask outside, too.

Sources:  
Angus Reid Global. COVID-19 Weekly Monitoring of Canadian Perceptions & Behaviour. n=1,001

*% of Canadians claiming to be practicing social distancing / wearing a mask*

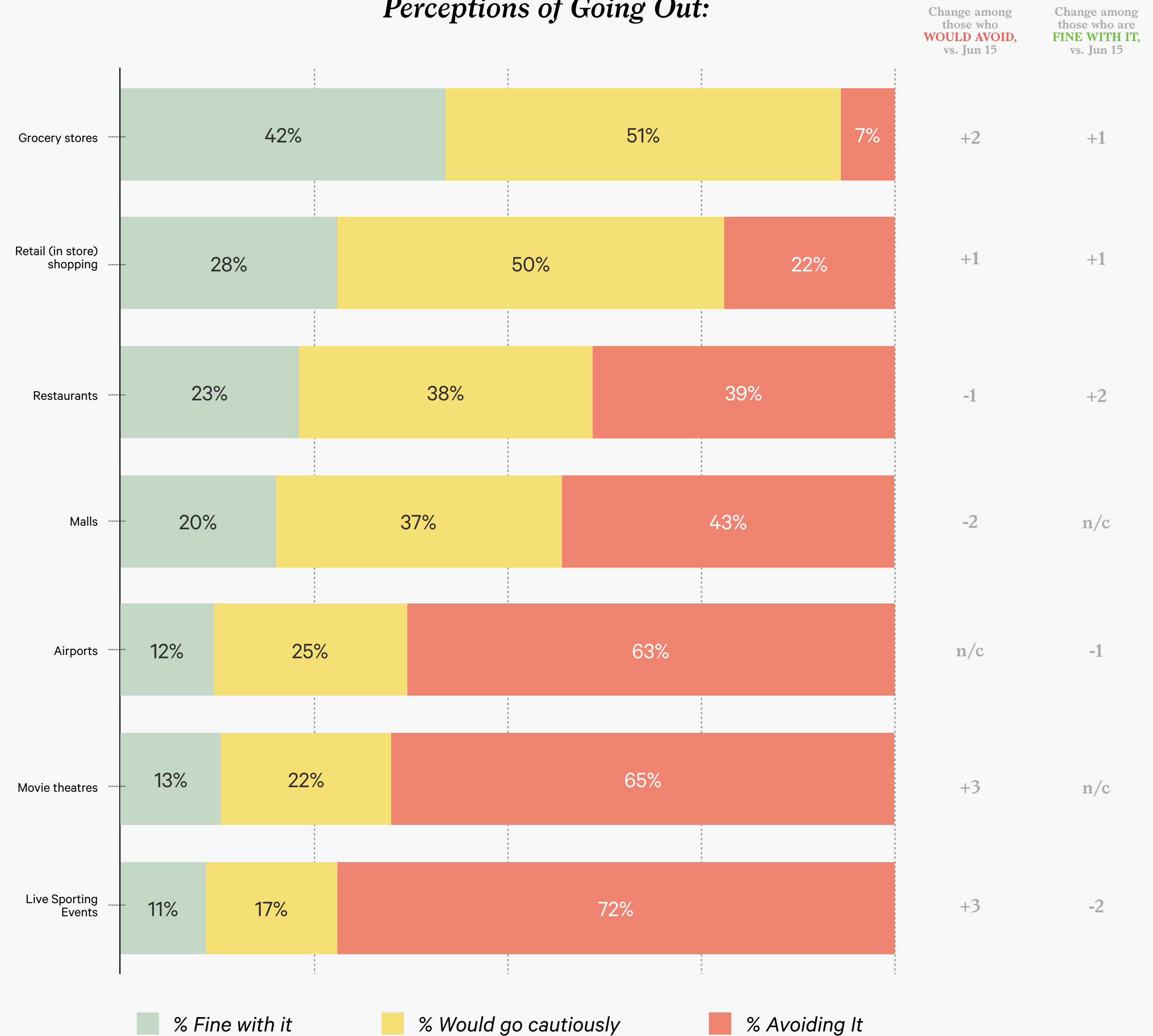


# COMMUNITY-BASED BUSINESSES STILL PERCEIVED AS THE SAFEST TO VISIT.

Though there were some small fluctuations in perception (e.g. grocery stores, restaurants and live sporting events), Canadians are generally comfortable with getting back out to businesses and public places in their communities, that have proven themselves to be a safe place to visit. However, for other public venues offering desirable, but less important services (like movie theatres, sporting venues), most Canadians believe it will be winter or later before they consider returning with regularity.

Sources:  
Angus Reid Global. COVID-19 Weekly Monitoring of Canadian Perceptions & Behaviour. n=1,001

Perceptions of Going Out:



# SOME SHOPPING DECISIONS AND EXPECTATIONS ARE CHANGING.

It is still too early to say exactly how consumer behaviour will be permanently changed as a result of isolation restrictions, but consumer attitudes and expectations generally indicate that omni-channel experiences will be even more important in the future. Even as many intend to return to traditional sources of purchase in the near future (i.e. malls), the tools they use and the paths they take to make purchase decisions are significantly changing, driven by the need to rely on digital tools over the past 4 months.

**Sources:**

Ipsos. *The Path Forward - Understanding Emerging Consumer Behaviour*, updated June 23. n=1000



*People will return to malls.*

Right now, only 1 in 5 Canadians feel totally fine visiting a mall. But more than 2 in 3 say they would be comfortable visiting a mall within the next 3 months.



*Omni-channel will accelerate the change of shopping experiences.*

Nearly 8 in 10 Canadians claim to now spend less time browsing in-store because they want to get in and out quickly, while more than 3 in 10 have replaced online tools as a replacement for shopping they used to do in store.



*Traditional notions of brand preference will change.*

49% of shoppers bought a new brand because of their omnichannel experience, and 30% say they will shop at local small businesses even after the pandemic is over.

# BUSINESSES ARE BEING HELD TO A HIGH HEALTH & SAFETY STANDARD.

Despite the lower incidence of Canadians practicing social distancing and mask-wearing personally, they are putting much of their personal onus onto businesses and operators of public places to make spaces safe and comfortable for patrons. More than 8 in 10 cite health and safety measures to be an important factor when considering to return to a business, yet 1 in 3 do not feel confident that businesses are doing all they can to follow health and safety protocols.

Sources:  
Ipsos. Consumer Health & Safety Check Up. n=1,000

## Retail health & safety, by the numbers:

**82%**

Believe health & safety measures to be the most important factor when considering returning to a retailer

**64%**

Claim they will stop or temporarily stop shopping at location(s) that doesn't take health and safety seriously.

**28%**

Do not trust businesses for their cleanliness and health / safety protocols

**69%**

Believe companies were not exerting the greatest effort to keep customers safe

# SENTIMENT CONTINUES TO EASE TOWARDS NEW CAMPAIGNS.

Building on several weeks of positive momentum, Canadians continue to express more openness to businesses returning to normal practices, such as releasing new ad campaigns, launching new products, or promoting offers. Relative to the proportion of the population who are still extremely worried about the crisis, it is unlikely that some of these opinions will ever reach a total consensus of agreement, but they continue to move in favour of returning to business as usual.

Sources:  
Angus Reid Global. COVID-19 Weekly Monitoring of Canadian Perceptions & Behaviour. n=1,001

*By the numbers:*

**77%**

Now is the time to start stimulating our economy back to health (% agree)

Last Week:  
**79%**

**32%**

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

Last Week:  
**35%**

**34%**

Do not want to see companies launching any new ads or promotions right now

Last Week:  
**36%**

**47%**

Do not mind if companies continue business as usual

Last Week:  
**46%**

# WANT TO CHAT? WE'RE HERE FOR YOU.

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