

COVID-19 PUBLIC TRUST & READINESS BAROMETER

A guide to safely re-opening
the Canadian economy.

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ENVIRONICS
RESEARCH



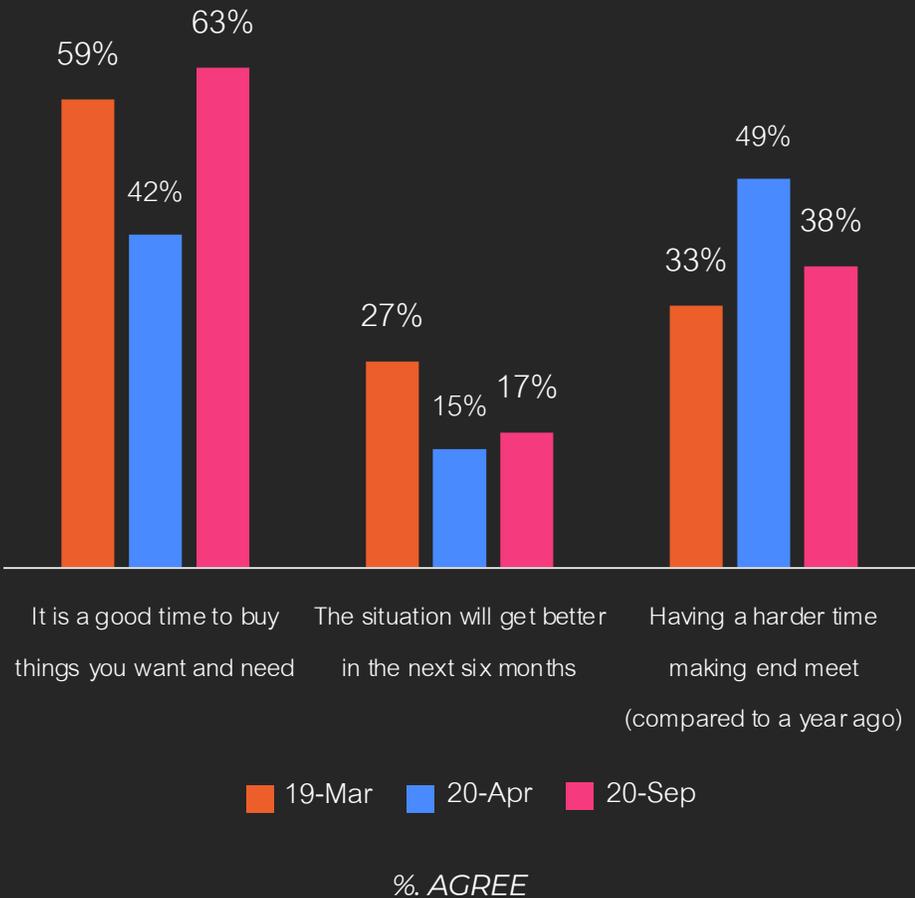
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INTRODUCTION

Following a several month shut down across much of Canada, economic activity resumed mid-year as restrictions were eased and many Canadians enjoyed a relatively “normal” summer. But as predicted, a second wave has arrived and case counts are mounting in several regions across the country. Discussions are underway about the type of restrictions that will be needed to manage the health crisis while balancing the economic fall out.

Canadians are re-gaining their confidence as consumers, but substantial worries remain in relation to the overall economy and specific aspects of life. Trust in governments has declined. While Canadians want to be doing the right thing to protect others in the community, they are losing confidence about the right balance between public health and economic activity. Governments and public officials will need to provide clearer direction.

Consumer Confidence

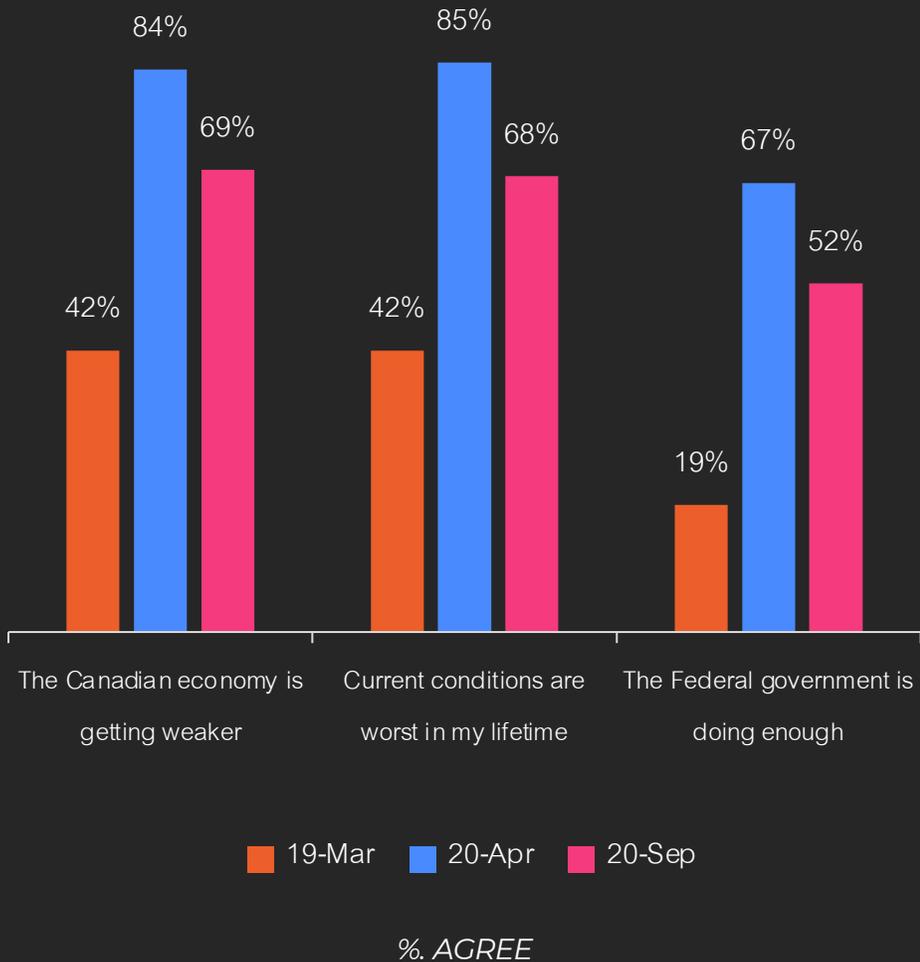


REGAINING CONSUMER CONFIDENCE

After dropping moderately in April 2020, consumer confidence has returned to pre-pandemic levels. A similar rebound is evident in Canadians' reported ability to make ends meet. After a surge of financial stress in April, the proportion of Canadians who say it's harder to get by than it was a year ago has declined to near pre-pandemic levels.

Canadians' optimism about their near-term financial outlook has taken a more lasting hit, however. The share who anticipate that their financial circumstances will improve over the next six months has declined and stayed low.

Canadian Economy



WORRY ABOUT THE CANADIAN ECONOMY

Relative to April this year, fewer Canadians now see the country’s economy as getting weaker or feel that current conditions are the worst in their lifetimes. Nevertheless, both these forms of concern are higher than they were in early 2019.

While only one in five felt the federal government was doing enough about the economic situation in March 2019, that proportion increased to two in three in April this year, as the government rolled out an extensive slate of pandemic relief supports. The share of Canadians believing the government is doing enough has since declined to about half.



IMAGE CREDIT:
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PUBLIC SAFETY REMAINS PARAMOUNT

Canadians continue to prioritize public safety over resuming economic activity, although there has been some movement in favour of the latter priority. Two-thirds of Canadians still say that public health is the most important concern for society right now, even if protective measures mean a longer economic downturn.

As governments work to reopen the economy without letting the spread of the virus get out of control, the key balance will be permitting as much economic activity as possible while maintaining enough restrictions and enforcement to sustain public confidence. A public that prioritizes safety will shy from a “reopened” economy they see as too risky.

Priorities In The Pandemic

While there has been some movement toward permitting economic activity, two-thirds of Canadians prioritize protecting public health, even if that means a longer economic downturn.

Q: Which of the following is your priority for the coming months?

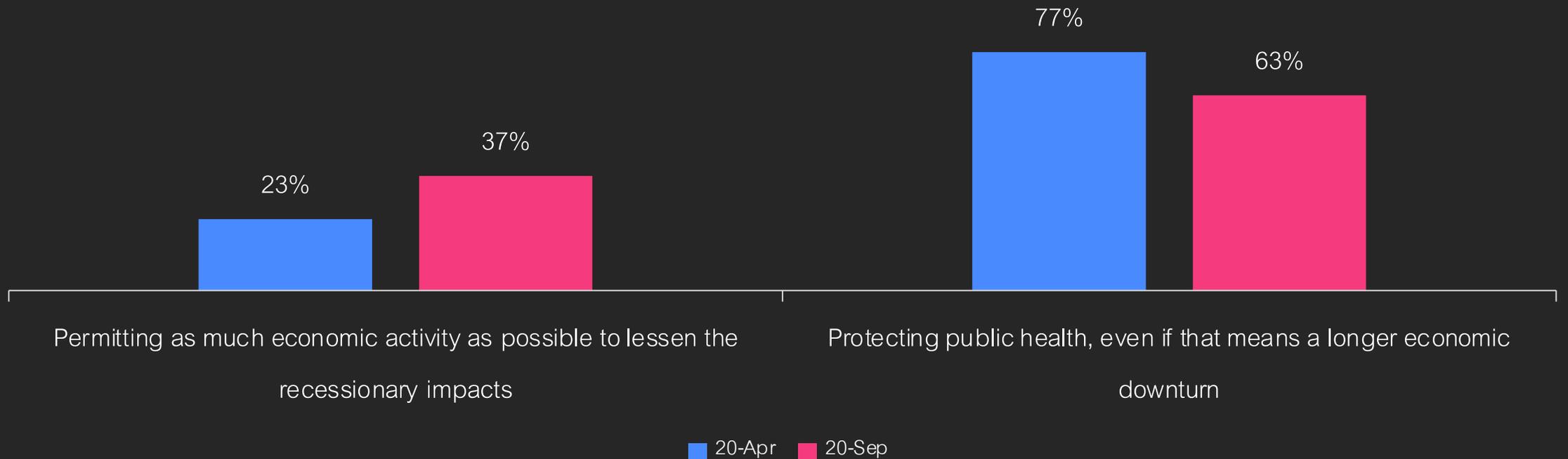




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STAYING HEALTHY MATTERS MOST

Since our last measure in April, two priorities remain fixed at the top of Canadians' list: not getting COVID-19 themselves, and protecting others in the community.

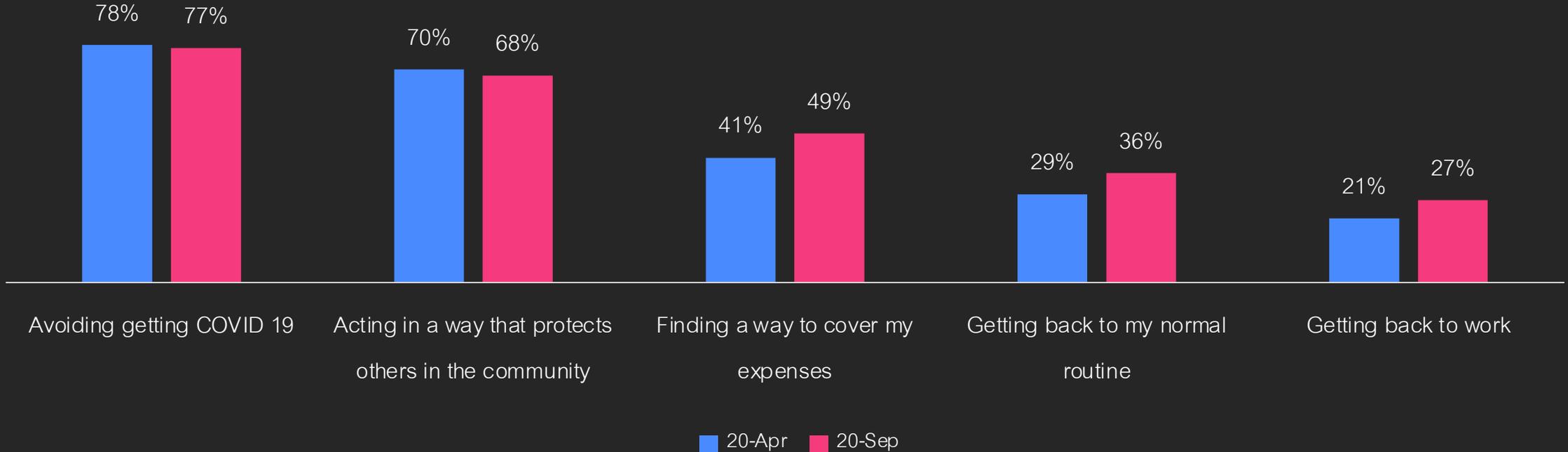
Between April and September the public emphasis on other priorities has shown moderate growth. Canadians are now more focused on finding ways to cover their expenses, getting back to their normal routines and getting back to work.

Even with this increased attention to economic and lifestyle priorities, however, personal wellbeing and the health of others are still Canadians' main focus.

What Is Important To Canadians?

While Canadians continue to prioritize avoiding COVID-19 and protecting others in the community, there have been modest increases since April in the proportions placing strong importance on finding a way to cover their expenses (+8), getting back to their normal routines (+7), or getting back to work (+6).

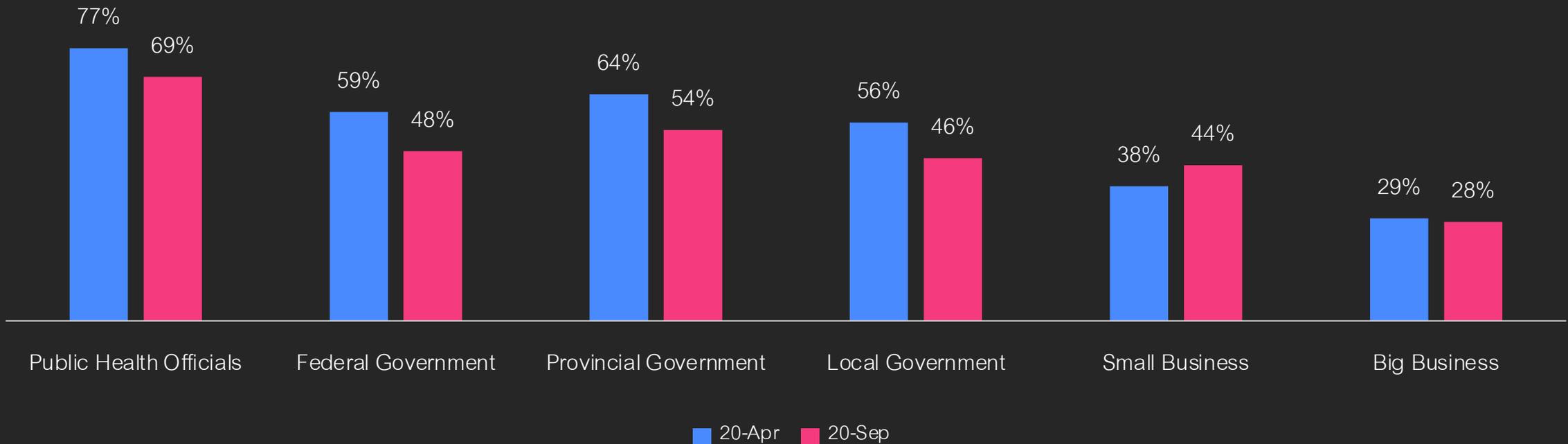
Q: What is important to Canadians (% VERY IMPORTANT)?



Declining Trust In Governments

Trust in governments and public health officials has declined somewhat over the past few months, while trust in big business has held steady (at a relatively low level) and confidence in small businesses has grown slightly.

Q: When it comes to managing the pandemic and steering the economy, how much do you trust each of the following to make decisions in the public interest (%7-10/10)?



PUBLIC CONFIDENCE RETURNING, SELECTIVELY

Canadians are moderately confident that others' will behave appropriately in the face of COVID-19. This confidence has remained stable between April and September, with Canadians' faith in employers, large and small businesses, and the public at large remaining largely unchanged. One notable exception: there has been a decline in the share of Canadians who believe governments will strike the right balance between protecting public health and encouraging economic activity.

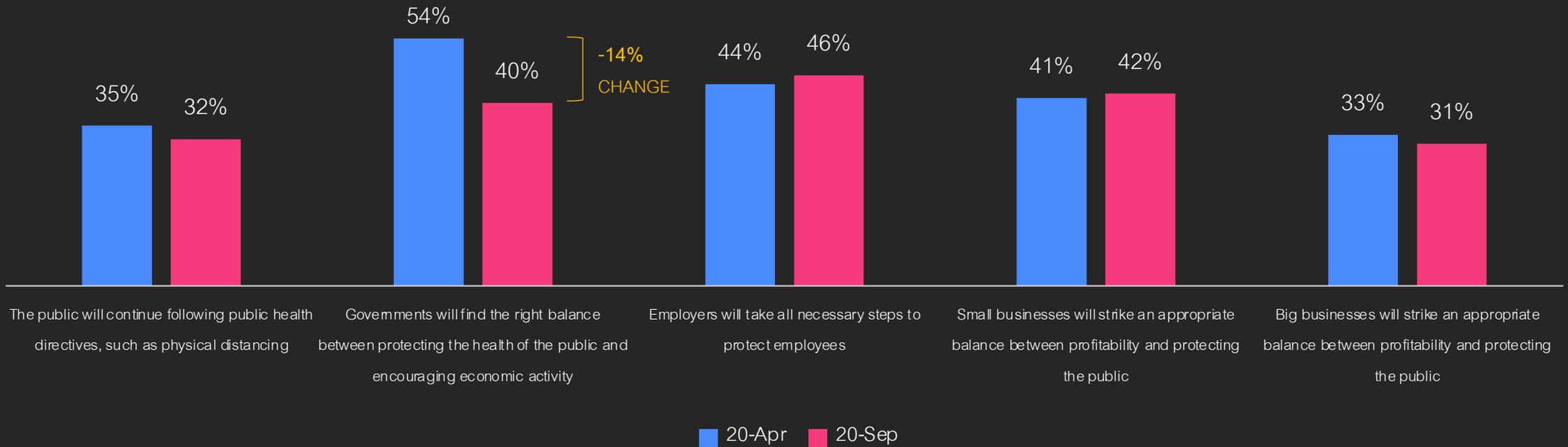
Canadians have become more confident about a range of shopping activities and personal services, such as haircuts and medical appointments. They remain wary about some activities such as public transit, movies, sporting events and going to the gym, while confidence about returning to work and resuming normal routines more generally has declined somewhat between April and September.



How Confident Are Canadians Feeling?

Canadians confidence that their fellow citizens, employers and businesses will do the right thing is largely unchanged. Their confidence in the ability of governments to appropriately balance public health with economic activity, however, has declined over the past several months.

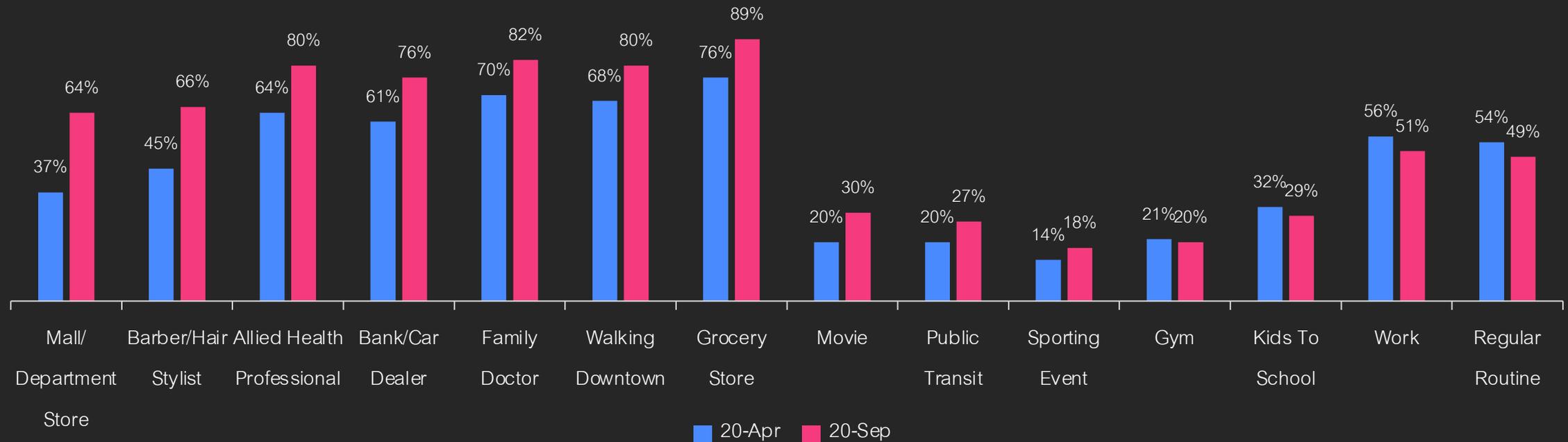
Q: How confident are you in each of the following? (% 7-10/10)



How Comfortable Are Canadians Feeling?

Canadians have become more confident about a range of shopping and services, but remain worried about things like public transit, movies, sporting events, going to the gym and returning their kids to school. They have also become slightly less comfortable with the idea of return to work or to their normal routines.

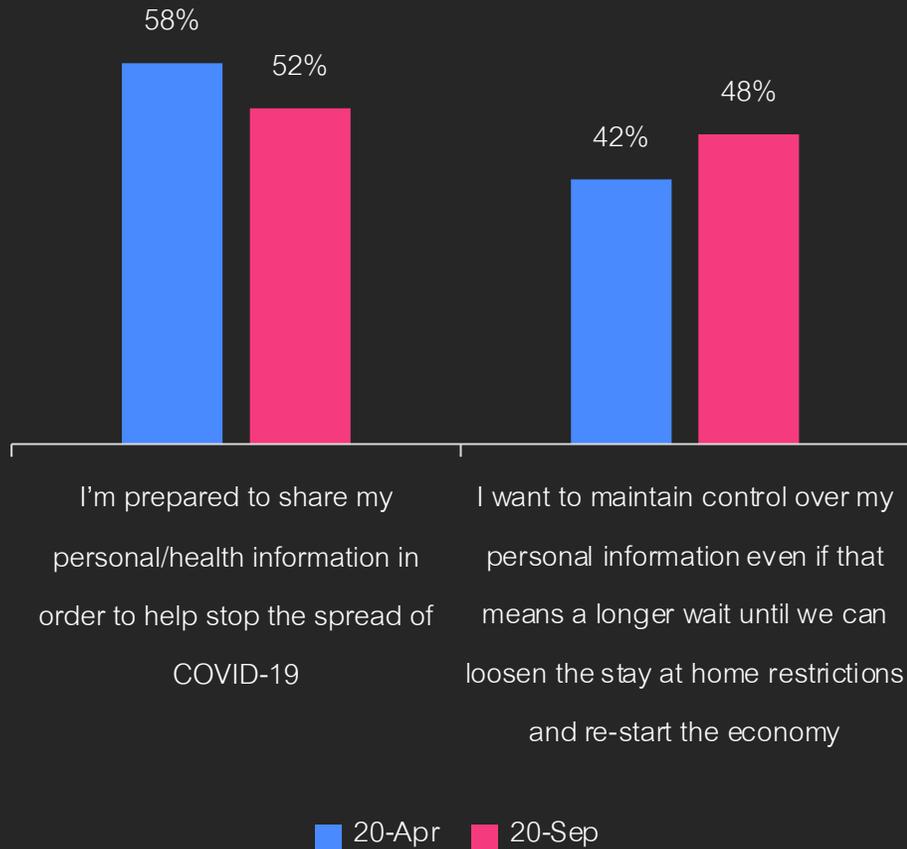
Q: How comfortable do you feel about using or going to: ... ? (% VERY/SOMEWHAT COMFORTABLE)



Information Privacy

WHICH OF THE FOLLOWING IS CLOSEST TO YOUR OPINION?

% AGREE



TRACKING APPS: INFORMATION PRIVACY VS. PUBLIC HEALTH

Canadians remain divided over the use of mobile phone apps to track COVID-19 status. When asked to choose between information privacy and helping to stop the spread of the virus, Canadians are about evenly split between the two priorities. Between April and September of 2020, the public became moderately more likely to favour protecting their privacy.

Technology experts argue that the federal government's COVID-19 app is designed to protect users' privacy and anonymity while alerting them to possible virus exposure. But, along with inter-governmental sparing, public fears about privacy may help to explain why as of early November the app had been downloaded only about 5 million times.



IMAGE CREDIT:
GETTY IMAGES

LEVERAGING SOCIAL VALUES TO ENCOURAGE PUBLIC HEALTH TRACKING APP USE

Analysis of the social values of those who reject app use on privacy grounds, point to opportunities to engage and potentially influence them toward acceptance.

This group has an interest in new and modern products and services and want to experience something new each day. They also have a desire to impress others, meaning that framing COVID apps as contributing to the public good may appeal to this audience. The social values analysis also suggests that those who are concerned about protecting their personal information also have a tendency to trust and use advertising as a source of information.



IMAGE CREDIT:
UNSPLASH

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Competing apps and sparring governments do little to build public confidence or create clarity around what is needed from citizens in the fight against COVID-19. Governments and public health officials must re-assert themselves to build confidence in their ability to find the appropriate balance between public health and economic activity.

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—Tony Coulson, Group Vice President,
Corporate & Public Affairs

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CONCLUSION

Many Canadians are feeling conflicted at this stage in the pandemic. While most want to protect themselves and others, half are now focussed on finding a way to cover their expenses and many are craving a return to some sort of normal.

Economic concerns combined with declining trust in public officials is creating a situation where clear directions are needed to guide public action. Governments and public health officials must re-assert themselves in a way that builds confidence in their ability to find the right balance between public health and economic activity.

The controversy over COVID tracking apps is a case in point. Competing apps and sparring governments do little to build public confidence or create clarity around what is needed from citizens in the fight against COVID-19.

ABOUT THIS STUDY

The Environics' Public Trust & Readiness Barometer provides guidance to decision-makers in the public and private sectors who are working to balance public health and economic activity. This is the second wave of a tracking study that measures:

- Public trust and confidence in government and employers across the country and in a range of sectors
- Readiness and participation in consumer activity across a range of sectors, including retail, food and beverage, healthcare, tourism and entertainment.
- Custom questions provided only to subscribers.

The first Public Trust and Readiness survey was conducted April 28-30, 2020 with 1,294 adult Canadians. The second wave was conducted September 3-14, 2020 with a sample of 1,628 Canadians.

ABOUT SOCIAL VALUES

The Environics Research Social Values measurement system identifies the structure of social values in society and monitors change in those values over time. Social Values represent a person's mental posture or fundamental world view; and set the context for reactions to situations, events, opportunities or challenges.

Environics Research has been measuring Social Values since 1983. Since then, we have compiled the largest database of *Social Values* trends in North America. Our annual surveys of more than 10,000 Canadians and Americans allow us to precisely track changes in Social Values over time. Data on specific topics, such as public trust as addressed in this paper, can be attached to the larger data set, enabling deeper insight into motivations and world views.



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