



COVID-19 PUBLIC TRUST & READINESS BAROMETER

A guide to safely re-opening
the Canadian economy.

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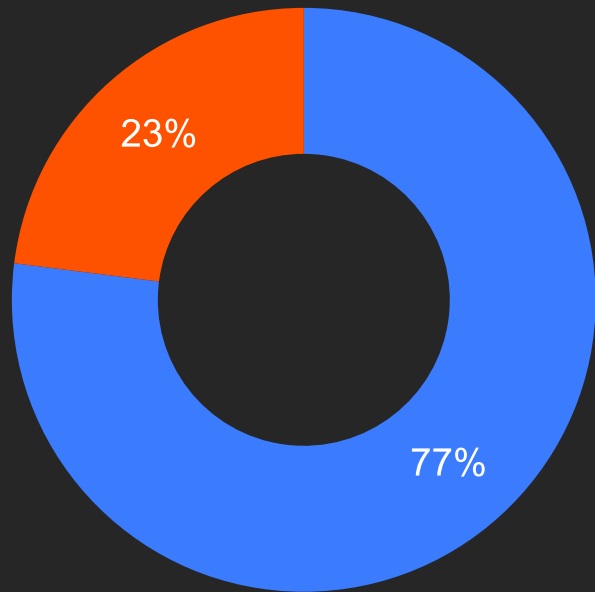


IMAGE CREDIT:
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INTRODUCTION

After nearly two months of shutdown, preparations are underway across Canada to restart the economy. Success over the coming weeks and months will require a careful balance between relaxing restrictions and creating a safe environment for commerce to resume. Businesses need to open despite the potential risks of doing so, and the public needs to participate, both as employees and consumers. Too little activity means the recovery will be slow and economically painful; but too much will lead to further outbreaks and, potentially, the need to re-establish stay-at-home protocols. This study is designed to inform the efforts of government and business to restart the economy by examining the Canadian public's priorities, their trust in a range of stakeholders who will make decisions related to the reopening, and their readiness to participate.

Which of the following is your top priority for the coming months?



Restarting the economy as fast as possible to lessen the recessionary impacts.

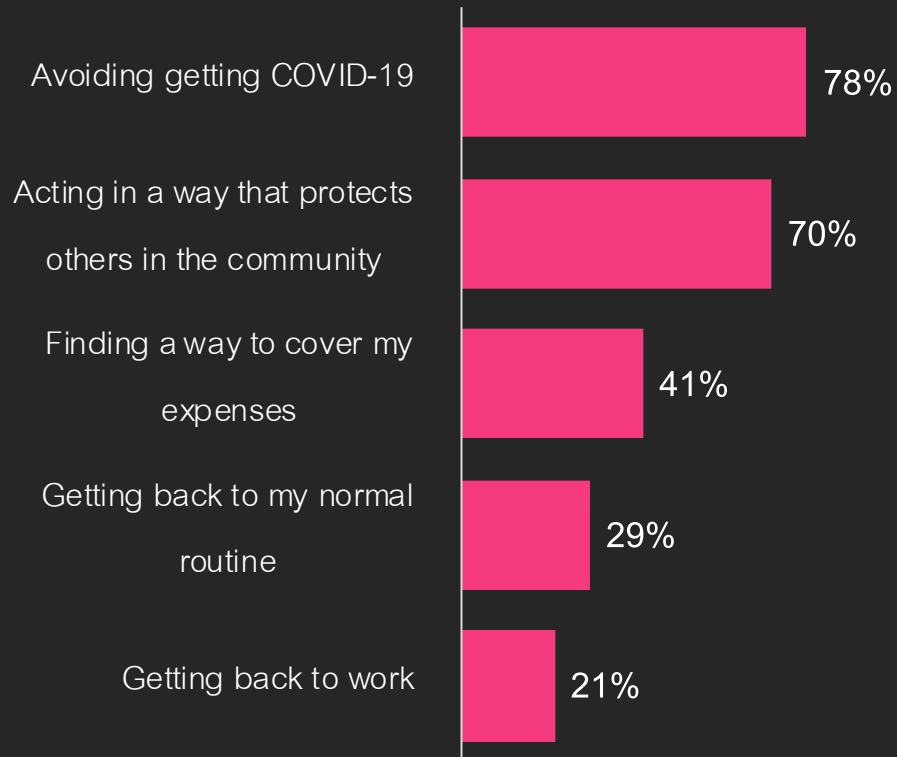
Protecting public health, even if that means a longer economic downturn.

PUBLIC SAFETY IS PARAMOUNT

Three-quarters of Canadians are feeling very cautious about resuming economic activity. They prioritize public health, and protecting themselves and others, above a return to normal; even if that means exacerbating the economic downturn.

At this moment, many Canadians will be anxious about leaving the safety of their homes and re-entering the economy. Whether that means going to work, sending their children to school, or just running personal errands. As governments move to reopen the economy, they will need to find an equilibrium where the economy can restart, but with enough restrictions in place to maintain public confidence.

How important are each of the following for you personally?



% VERY IMPORTANT

STAYING HEALTHY MATTERS MOST

Many Canadians have mixed feelings about getting back to normal. While they want to get back to their routines, they are also worried about becoming ill or putting others in harm's way. Staying healthy and acting in a way that protects others in the community are being prioritized over finding a way to cover personal expenses, getting back to their normal routine or even getting back to work.

As time wears on, though, how will these priorities change? Millions of Canadians have already applied for financial assistance, and we're hearing warnings about impending bankruptcies under worsening conditions. A successful reopening will depend on the right balance of participation: too cautious, and the economy won't rebound as needed; too eager, and restrictions will need to be renewed.

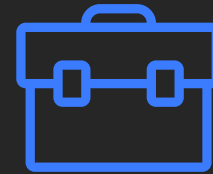
Are Canadians ready to resume economic activity?

If the restrictions were lifted tomorrow...



64%

of Canadians would be comfortable seeing a health professional such as a physiotherapist, dentist, eye doctor.



56%

of Canadians would be comfortable going to work.



30%

of Canadians would be comfortable dining at a restaurant or bar.



TO STIMULATE PARTICIPATION, CONSIDER HUMAN MOTIVATION

A little more than half of Canadians are aligned with the approaches being discussed. They expect services will open gradually, in phases, starting with critical business activities that can be done safely. In the remainder of the population, two segments emerge that will present challenges for decision-makers.

While each of the provinces and territories is taking its own approach to reopening the economy, Social Values provide a common lens through which we can understand the underlying motivations of Canadians, and offer guidance for how governments and businesses can responsibly encourage participation among the public, customers and employees.

OPEN-UP ENTHUSIASTS

8% of CANADIANS



IMAGE CREDIT:
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OPEN-UP ENTHUSIASTS WILL NEED CHECKS AND BALANCES

The first segment of concern for decision-makers is the Open-Up Enthusiasts, who are eager to resume their daily routines on all fronts. Physical distancing has been challenging for this segment, as they enjoy being surrounded by others and sharing events with large groups. They are risk-takers who will push boundaries to get what they want. This segment needs to be cautioned about the impact of not following the rules as the economy reopens. An appeal to their commitment to duty to others before their own needs will resonate and keep them in check. Dedicated store hours for vulnerable customers and health screenings likely won't be a deterrent for this group. In fact, the trust they have in businesses will only be reinforced.

Social Values Of Open-Up Enthusiasts



PENCHANT FOR RISK

Desire to take risks in order to get what one wants out of life. Also, indulging in dangerous and forbidden activities for their associated emotional high.



DUTY

Belief that duties and obligations to others should be fulfilled before turning to one's personal pleasures and interests.



ATTRACTION TO CROWDS

Enjoyment of being in large crowds as a means of deindividuation and connection-seeking.



CONFIDENCE IN BIG BUSINESS

Belief that big businesses strive to strike a fair balance between making profit and working in the public's interest. Expressing a certain level of faith that what serves the interest of big business also serves the interest of society, and vice versa. Associating good quality and service with big business and well-known products.

ANXIOUS CONSUMERS

30% of CANADIANS



IMAGE CREDIT
GETTY IMAGES

ANXIOUS CONSUMERS WILL NEED NUDGING

The second segment of concern for decision-makers is the Anxious Consumers. They represent a sizeable proportion of the population who are very hesitant to resume any type of activity, including allied health services. It will be necessary to convince this segment that it is in fact okay to resume activity. Anxious Consumers embrace predictability; the complexity of physical distancing, including the increased use of technology, has caused them to retreat from society. Routine is vital to this group; and they possess a strong sense of community. Communications that promote resuming connections with their community will resonate; and, although they are anxious about technology, businesses that can clearly articulate the benefits of new digital services and assure them that their privacy is protected will win these customers over in the long term.

Social Values Of Anxious Consumers



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AVERSION TO COMPLEXITY

A desire to keep one's life simple and predictable. People strong on this trend are intimidated and threatened by the changes and complexities in modern life and values. They look for stability and simplicity. (Inverse: Adaptability to Complexity).



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SOCIAL INTIMACY

A desire to be around and connect with smaller, closely knit groups of people. Feeling that smaller organizations are better than larger ones.



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TECHNOLOGY ANXIETY

People strong on this construct are intimidated and threatened by technological changes and express high concern regarding the ethical and moral dimensions towards which science is advancing.

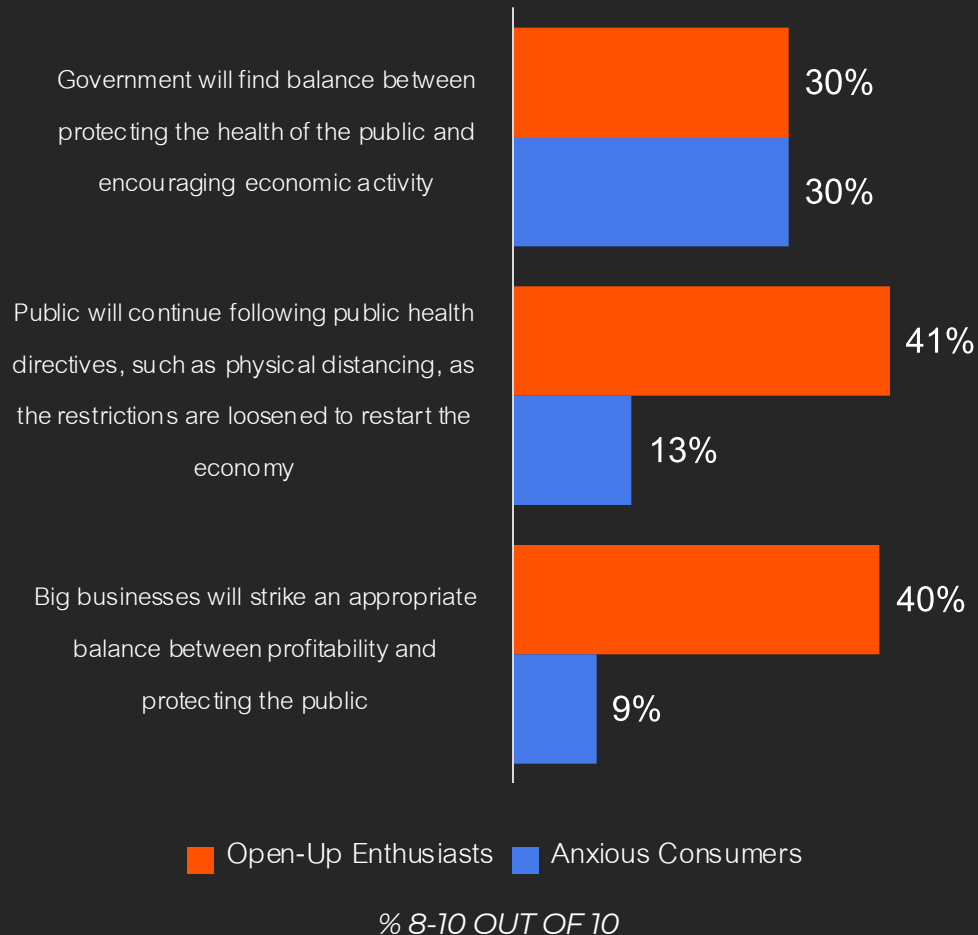


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CONTROL OF PRIVACY

Great concern about the fact that in databases, among other ways, government and business are amassing increasingly large banks of information about people's private lives. People strongest on this trend are selective in their purchases, notably by considering the ethics of the manufacturers.

How confident are you in each of the following?



BUSINESSES WILL HAVE TO JUSTIFY THEIR ACTIONS TO OPEN

Among both segments, only a minority expect governments to find the right balance between protecting the public and restarting the economy.

Anxious Consumers don't trust their fellow citizens to be cautious enough about physical distancing, or trust businesses to do enough to protect the public interest. They will be looking to see how businesses adhere to the guidelines set out by public health officials, and the corrective actions they take when problems arise.

Open-Up Enthusiasts have greater confidence in both the public and businesses to do the right thing because they expect public health controls will be in place. A lackadaisical approach will sour their impressions of brands they admire.



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Many Canadians are feeling anxious about the opening of the economy. At the same time, they have become quite trusting of public health officials and are looking to them for reassurance.

In order to maintain public confidence, businesses and governments will need to demonstrate alignment with the advice of these trusted officials.

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

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IMAGE CREDIT:
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SO WHAT?

When it comes to making decisions in the public interest, the public puts their faith in public health officials and, to a lesser extent, governments over businesses. Many Canadians lack confidence that the public will continue following public health directives, such as physical distancing, or that employers will take the necessary steps to protect employees.

Restarting the economy will require governments and public health officials to lead the conversations, and employers and businesses to act and communicate in ways that inspire public confidence. To maintain public trust and build the confidence required for a successful reopening, businesses will need to act – and be seen acting – in ways that protect employees and consumers.



IMAGE CREDIT:
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NOW WHAT?

The role of businesses will be to incorporate the use of personal protective equipment (PPE), and reconfigure places of business to enable physical distancing. It will also mean adapting to changing consumer needs; whether those are naturally occurring or a product of the current situation.

The role of governments will be to follow the advice of public health officials in setting and communicating the parameters, so that businesses and the public know what is expected, and what to expect; to ensure that PPE is available in the required quantities; and to communicate effectively, particularly to encourage the Anxious Consumers – but also to Open-Up Enthusiasts, who may need to be cautioned. In either case, developing a nuanced understanding of the attitudes and motivations of key audiences will increase the probability of a smooth recovery for the economy.



IMAGE CREDIT:
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Canadians will have new unmet needs as the economy reopens. The “next normal” lies somewhere between past preferences and current necessity; and will ultimately depend on how quickly confidence is restored.

—John Crockett, Vice President
Strategy & Innovation

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ABOUT THIS STUDY

Environics' Public Trust & Readiness Barometer provides guidance to decision-makers in the public and private sectors who are tasked with coordinating or implementing a reopening of our economy. This is the first wave of a bi-weekly tracking study that will measure:

- 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.

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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