WINTER IS COMING...
CANADIANS, A PANDEMIC, AND PUBLIC OPINION

RESEARCH AND ANALYSIS FROM CANADA’S LEADING PUBLIC AFFAIRS AND MARKET RESEARCH EXPERTS
1. PRE-COVID TRENDS WILL ACCELERATE.

2. CANADIANS HAVE BEEN FAIRLY SATISFIED WITH THE CANADIAN GOVERNMENT’S RESPONSE TO THE PANDEMIC.

3. BUT OUR POLITICS REMAINS VERY COMPETITIVE.
THE CONTEXT
CANADIANS ARE ANXIOUS AGAIN ABOUT COVID-19

ABACUS DATA
Overall, how worried, if at all, is the situation with the coronavirus or COVID-19 making you right now?

- Extremely/A lot: 36%
- Somewhat: 26%
- A little: 30%
- Not at all: 8%
THE “WORRY” CURVE IS RISING AGAIN
% who say they are extremely/worried a lot about coronavirus/COVID-19

ARE WE BECOMING MORE OR LESS WORRIED?

MORE WORRIED

Mar 22  68%
Apr 7   61%
Apr 24  33%
May 6   28%
May 18  25%
May 24  29%
June 6  30%
June 21 28%
July 16 29%
July 29 35%
Aug 18  33%
Sept 22 49%
Oct 8   55%
Oct 13  57%
Oct 25  45%

LESS WORRIED

Mar 22  8%
Apr 7    7%
Apr 24  20%
May 6   28%
May 18  28%
May 24  25%
June 6  24%
June 21 30%
July 16 22%
July 29 19%
Aug 18  19%
Sept 22 11%
Oct 8    8%
Oct 13  11%
Oct 25  9%
GETTING COVID YOURSELF

JUNE 2020: 37% → OCT 2020: 46%

A FAMILY MEMBER GETTING COVID

JUNE 2020: 44% → OCT 2020: 55%
Which of the following best describes your view about the coronavirus outbreak?

- IS THE WORST STILL TO COME?
  - 63%
  - 69%
  - 36%
  - 42%
  - 36%
  - 40%
  - 33%
  - 32%
  - 35%
  - 44%
  - 46%
  - 44%
  - 45%
  - 55%
  - 57%
  - 58%
  - 52%

Dates:
- Mar 22
- Apr 7
- Apr 24
- Apr 30
- May 6
- May 11
- May 18
- June 6
- June 21
- July 6
- July 16
- July 29
- Aug 19
- Sept 9
- Sept 22
- Oct 8
- Oct 13
- Oct 25
## THE PUBLIC MINDSET

<table>
<thead>
<tr>
<th></th>
<th>Pre-COVID</th>
<th>Today</th>
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</thead>
<tbody>
<tr>
<td><strong>UNEMPLOYMENT</strong></td>
<td>5.5%</td>
<td>9.0%</td>
</tr>
<tr>
<td><strong>CONSUMER CONFIDENCE</strong></td>
<td>102</td>
<td>85</td>
</tr>
<tr>
<td><strong>JOB INSECURITY</strong></td>
<td>18%</td>
<td>26%</td>
</tr>
<tr>
<td><strong>CANADA IN RECESSION</strong></td>
<td>30%</td>
<td>95%</td>
</tr>
<tr>
<td><strong>SAVING SPARE CASH</strong></td>
<td>40%</td>
<td>51%</td>
</tr>
<tr>
<td><strong>GOOD TIME TO MAKE MAJOR PURCHASE</strong></td>
<td>42%</td>
<td>22%</td>
</tr>
<tr>
<td><strong>FEDERAL DEFICIT</strong></td>
<td>$34 B</td>
<td>$343 B</td>
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</table>
1. GROWING ANXIETY ABOUT COVID-19 AS A SECOND SPIKE CONTINUES. WINTER IS COMING...

2. MANY THINK IT WILL TAKE A YEAR OR MORE BEFORE WE ARE BACK TO NORMAL.

3. CHANGES IN PREFERENCES AND BEHAVIOURS WILL PRESIST AND BE MORE LIKELY TO STICK...
HOW ARE CANADIANS FEELING ABOUT THEIR GOVERNMENT AND POLITICAL SYSTEM.
THINGS HEADED IN THE RIGHT DIRECTION

THE WORLD 16%

THE UNITED STATES 10%

CANADA 35%
GENERALLY SPEAKING, DO YOU THINK THINGS ARE HEADED IN THE RIGHT DIRECTION?
RIGHT TRACK VS. FED GOV'T APPROVAL

Generally speaking, do you think things are headed in the right direction or are they off on the wrong track?

Mar 19 34% 34%
Apr 19 35% 35%
June 19 35% 36%
Aug 19 39% 37%
Nov 19 40% 37%
Dec 19 40% 38%
Jan 20 39% 35%
Feb 20 35% 37%
May 20 58% 43%
June 20 52% 42%
July 20 48% 41%
July 20 44% 39%
Aug 20 45% 39%
Sep 3-20 44% 38%
Sep 21-20 46% 38%
Sep 29-20 47% 38%
Oct 7-20 45% 35%

RIGHT TRACK | GOV'T APPROVAL
FEDERAL GOVERNMENT APPROVAL

38% → 45%

JANUARY 2020
APPROVE

OCT 2020
ABACUS DATA
OVERALL, DO YOU APPROVE OR DISAPPROVE OF THE JOB THE FEDERAL GOVERNMENT LED BY JUSTIN TRUDEAU IS DOING?
Impression of Leaders

Do you have a positive or negative impression of Justin Trudeau?

- **Trudeau**
  - Positive: 40%
  - Neutral: 19%
  - Negative: 40%
  - Don't know enough about them: 1%

- **O'Toole**
  - Positive: 23%
  - Neutral: 25%
  - Negative: 25%
  - Don't know enough about them: 28%

- **Singh**
  - Positive: 34%
  - Neutral: 29%
  - Negative: 24%
  - Don't know enough about them: 13%

**Abacus Data**
WHAT MATTERS MOST?

- Having a plan and policies to help deal with the COVID-19 pandemic: 43%
- Having a plan for the Canadian economy in the future: 16%
- Finding the right balance in spending and taxation levels: 12%
- Helping protect existing jobs and create new jobs: 11%
- Coming up with ideas to combat climate change and protect the planet: 10%
- Working to improve equality of all people in Canada: 9%
### WHAT MATTERS MOST? – LIBERAL VOTERS

<table>
<thead>
<tr>
<th>Issue</th>
<th>Percentage</th>
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</thead>
<tbody>
<tr>
<td>Having a plan and policies to help deal with the COVID-19 pandemic</td>
<td>53%</td>
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<td>Having a plan for the Canadian economy in the future</td>
<td>13%</td>
</tr>
<tr>
<td>Finding the right balance in spending and taxation levels</td>
<td>8%</td>
</tr>
<tr>
<td>Helping protect existing jobs and create new jobs</td>
<td>6%</td>
</tr>
<tr>
<td>Coming up with ideas to combat climate change and protect the planet</td>
<td>11%</td>
</tr>
<tr>
<td>Working to improve equality of all people in Canada</td>
<td>10%</td>
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WHAT MATTERS MOST? – CONSERVATIVE VOTERS

Having a plan and policies to help deal with the COVID-19 pandemic – 32%

Having a plan for the Canadian economy in the future – 28%

Finding the right balance in spending and taxation levels – 18%

Helping protect existing jobs and create new jobs – 13%

Coming up with ideas to combat climate change and protect the planet – 4%

Working to improve equality of all people in Canada – 4%
Do you want an election?

- Yes: 21%
- No: 57%
- Not sure: 22%
How would you vote tomorrow?

- Liberal: 33%
- Conservative: 31%
- NDP: 17%
- Green: 8%
- BQ: 7%

Graph showing the percentage breakdown over time from Dec-19 to Oct 26-20.

Data source: Abacus Data.
DO YOU HAVE A POSITIVE OR NEGATIVE IMPRESSION OF JUSTIN TRUDEAU?

<table>
<thead>
<tr>
<th>TRUMP</th>
<th>POSITIVE</th>
<th>NEUTRAL</th>
<th>NEGATIVE</th>
<th>DON'T KNOW ENOUGH ABOUT THEM</th>
</tr>
</thead>
<tbody>
<tr>
<td>12%</td>
<td>10%</td>
<td>77%</td>
<td>2%</td>
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</table>

<table>
<thead>
<tr>
<th>BIDEN</th>
<th>POSITIVE</th>
<th>NEUTRAL</th>
<th>NEGATIVE</th>
<th>DON'T KNOW ENOUGH ABOUT THEM</th>
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<tbody>
<tr>
<td>36%</td>
<td>27%</td>
<td>22%</td>
<td>16%</td>
<td></td>
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</table>
IF YOU COULD VOTE IN THE US PRESIDENTIAL ELECTION...

JOE BIDEN 75%

DONALD TRUMP 25%
FINAL THOUGHTS

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