

Public Policy and the Next Normal: **Return to work**



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Leger

NORMAL
NEW

Public Policy and the Next Normal

Return to Work



PARTICIPANTS AND METHODOLOGY

Study Population

- Canadian residents

Data Collection

- A total of n=1536 online surveys were conducted via Leger's online panel, LEO.
- Interviews were conducted from May 29 to May 31, 2020.

Statistical Analysis

- As a non-probability internet panel survey, a margin of error is technically not to be reported.
- If the data were collected through a random sample, the margin of error would be Canada Residents (n=1500) $\pm 2.5\%$, 19 times out of 20.
- Results were weighted according to age, gender, and region (using data from the 2016 Census) in order to ensure a representative sample of the population.
- The numbers presented have been rounded to the nearest whole number. However, raw values were used to calculate the sums presented and therefore may not correspond to the manual addition of these numbers.





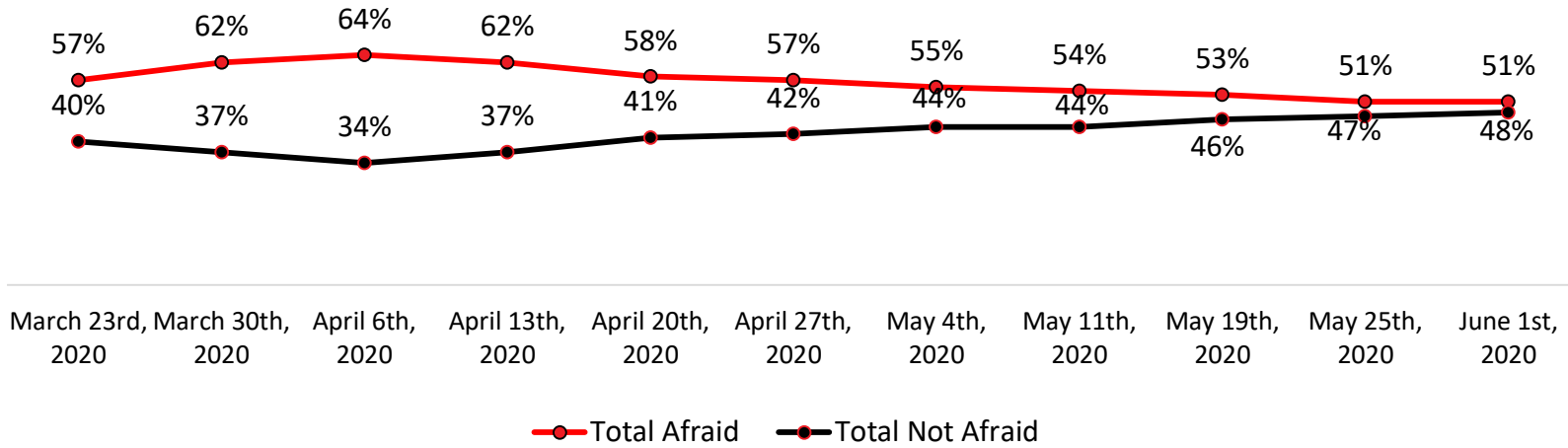
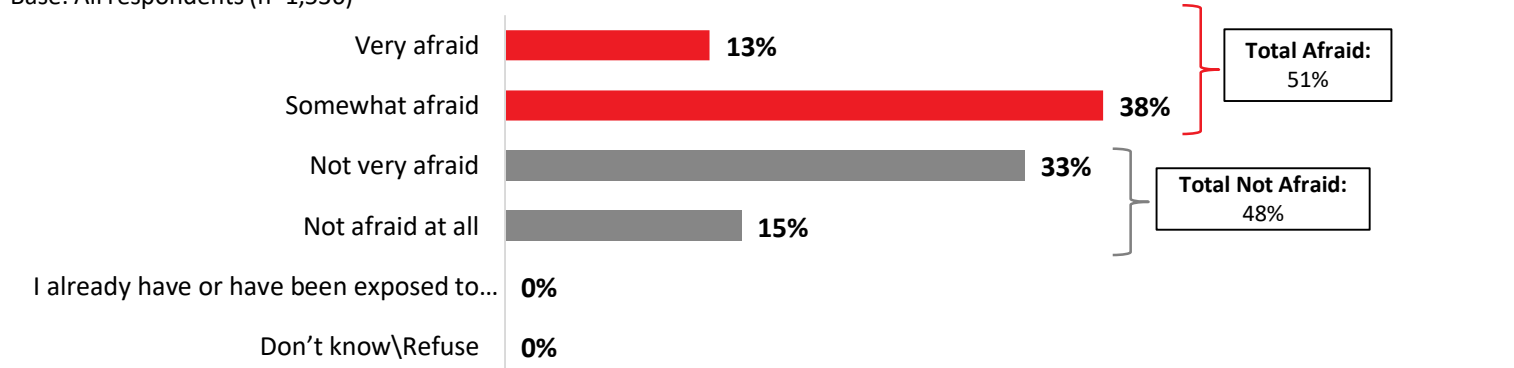
CURRENT CANADIAN ATTITUDES & THE PANDEMIC



FEAR OF CONTRACTING THE VIRUS

CTC1. Are you personally afraid of contracting the COVID-19 (Coronavirus)?

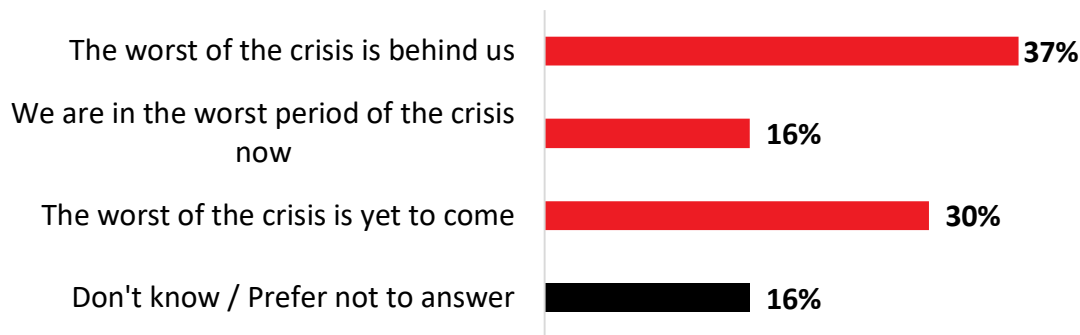
Base: All respondents (n=1,536)



EVOLUTION OF THE COVID-19 PANDEMIC

CTC20: What statement best describes your personal opinion of the COVID-19 crisis for Canada?

Base: All respondents (n=1,536)

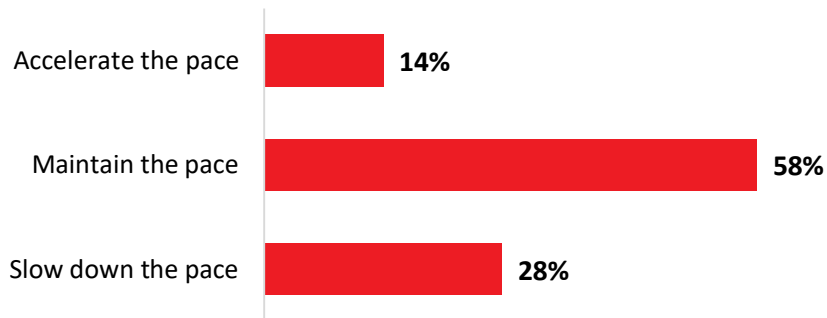


	TOTAL CANADA	ATL	QC	ON	MB/SK	AB	BC	TOTAL May 25 th	Gap
Weighted n =	1,536	105	360	590	100	172	208	1,510	
Unweighted n =	1,536	103	419	604	125	125	160	1,510	
The worst of the crisis is behind us	37%	32%	41%	33%	34%	38%	47%	28%	+9
We are in the worst period of the crisis now	16%	17%	16%	15%	18%	20%	14%	17%	-1
The worst of the crisis is yet to come	30%	34%	31%	31%	30%	31%	26%	33%	-3
Don't know / Prefer not to answer	16%	18%	12%	20%	18%	11%	13%	22%	-6

PACE OF RELAXING PROTECTIVE MEASURES BY GOVERNMENTS

CTC64. Do you feel that governments should accelerate, maintain, or slow down the pace at which it is relaxing social distancing/self-isolation measures to allow a gradual return to normal activities?

Base: All respondents (n=1,536)

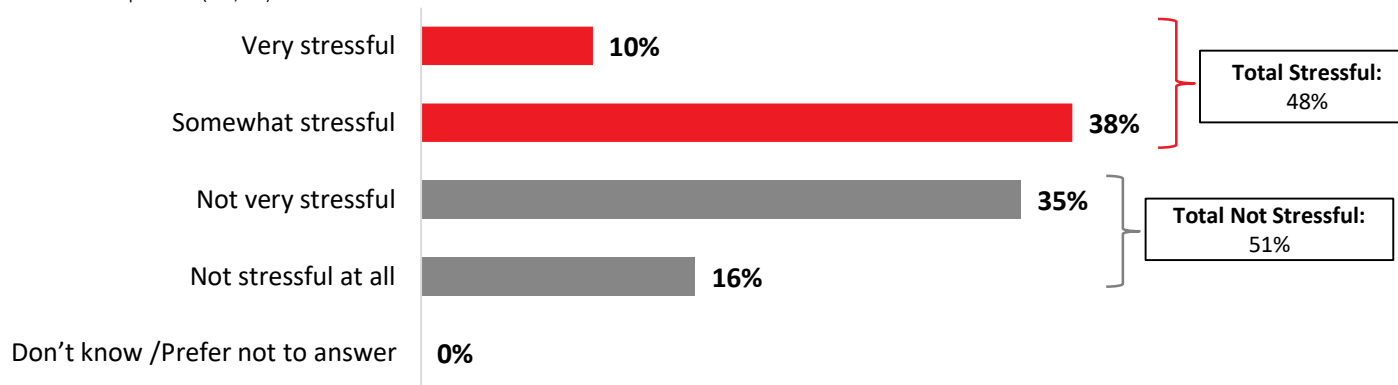


	TOTAL CANADA	ATL	QC	ON	MB/SK	AB	BC	18-34	35-54	55+
Weighted n =	1,536	105	360	590	100	172	208	419	524	593
Unweighted n =	1,536	103	419	604	125	125	160	389	492	655
Accelerate the pace	14%	11%	13%	14%	9%	14%	17%	20%	13%	10%
Maintain the pace	58%	59%	61%	54%	70%	55%	64%	51%	58%	64%
Slow down the pace	28%	30%	26%	32%	21%	32%	19%	29%	30%	26%

STRESS: LEAVING THE HOUSE / BEING IN PUBLIC

CTC72. When you have to leave your house and be out in public, to what extent do you find that stressful?

Base: All respondents (n=1,536)

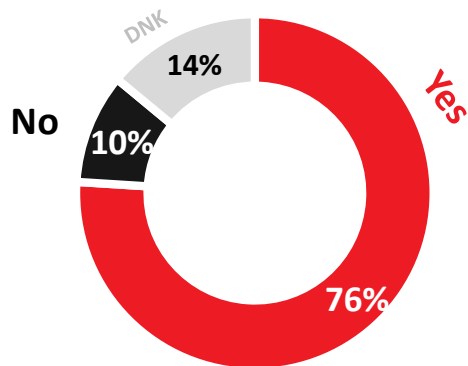


	TOTAL CANADA	ATL	QC	ON	MB/SK	AB	BC	18-34	35-54	55+	TOTAL May 25 th	Gap
Weighted n =	1,536	105	360	590	100	172	208	419	524	593	1,510	
Unweighted n =	1,536	103	419	604	125	125	160	389	492	655	1,510	
Total Stressful	48%	50%	37%	57%	48%	49%	40%	50%	51%	44%	51%	-3
Total Not Stressful	51%	50%	63%	42%	50%	51%	60%	49%	49%	55%	48%	+3

SECOND WAVE OF THE VIRUS

CTC96. Do you think there will be a second wave of the virus ?

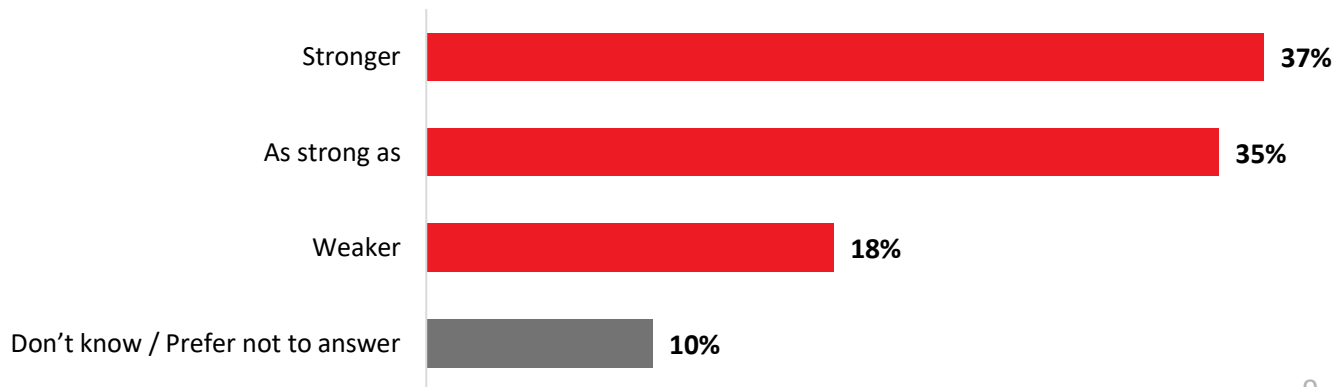
Base: All respondents (n=1,536)



STRENGTH OF THE SECOND WAVE

CTC97. Do you think the second wave will be stronger, as strong or weaker than the current wave?

Base: Respondents who think there will be a second wave (n=1,188)





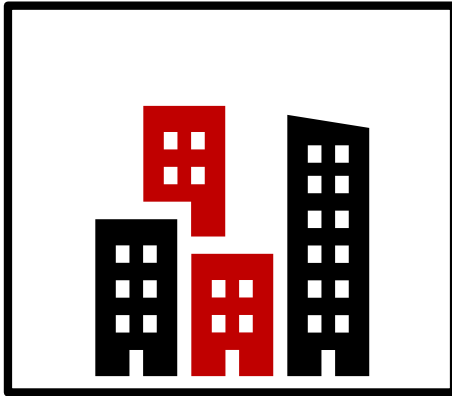
RETURN TO WORK IMPRESSIONS



Before pandemic, 79% of Canadians worked outside their homes and/or commuted daily

Pre-Pandemic

79%



Commuted daily to work/school

11%



Mainly worked/studied at home

8%



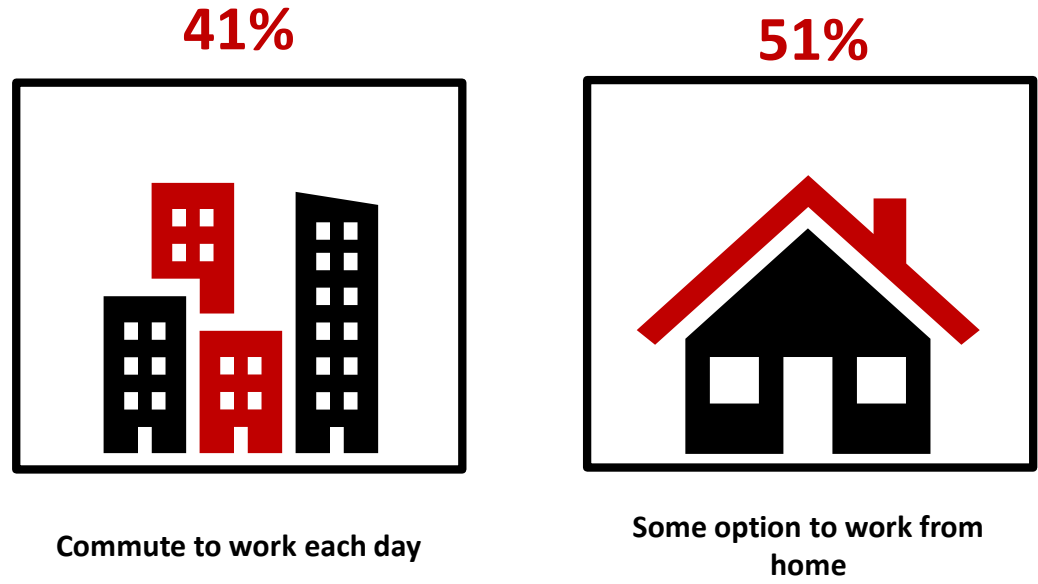
Not regularly working/studying/other

Q. Prior to the pandemic which of the following descriptions best described your work/school situation?

Base : Employed/Students (n=1010)

After pandemic, about half of Canadians prefer to have a work from home available

Post-Pandemic

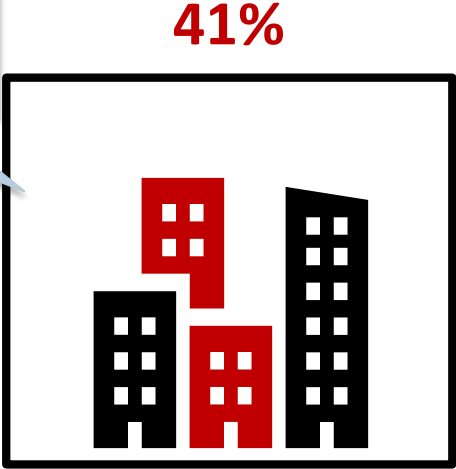


Q. After the pandemic crisis has passed and workplaces are allowed to open under certain operating conditions, which of the following work/school situations would you most prefer? Base : Employed/Students (n=1010)

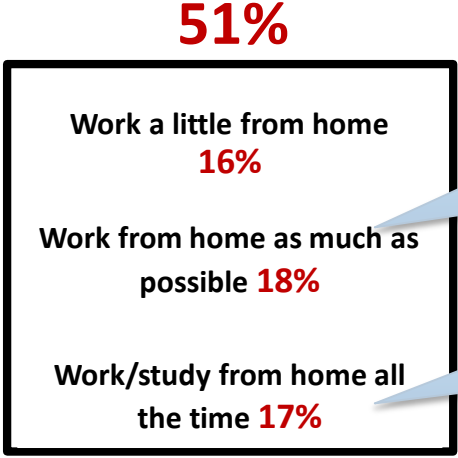
After pandemic, about half of Canadians prefer to have a work from home available

Post-Pandemic

Women are less likely to say they want to resume working/studying in the workplace (38%)



Commute to work each day



Some option to work from home

Residents in Suburban areas more likely to prefer to work home as much as possible (22%)

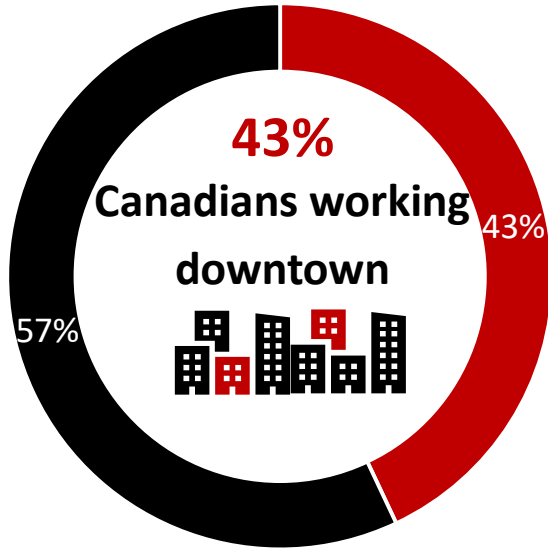
Those age 55+ least likely to work from home all the time (12%)

Only 45% of those previously commuting daily to work/school, want to return to the daily commute post-pandemic

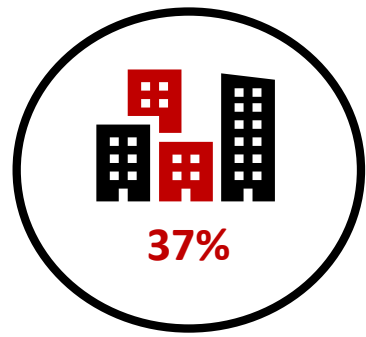
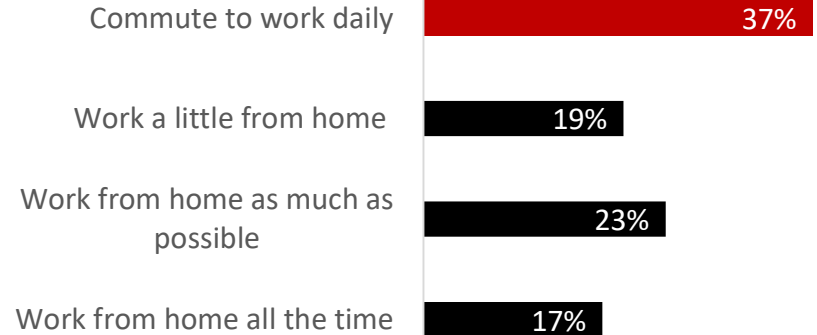
Q. After the pandemic crisis has passed and workplaces are allowed to open under certain operating conditions, which of the following work/school situations would you most prefer? Base : Employed/students (n=1010)

Those working downtown have lower willingness to return to the commute than others

**Pre-Pandemic -
Working downtown**



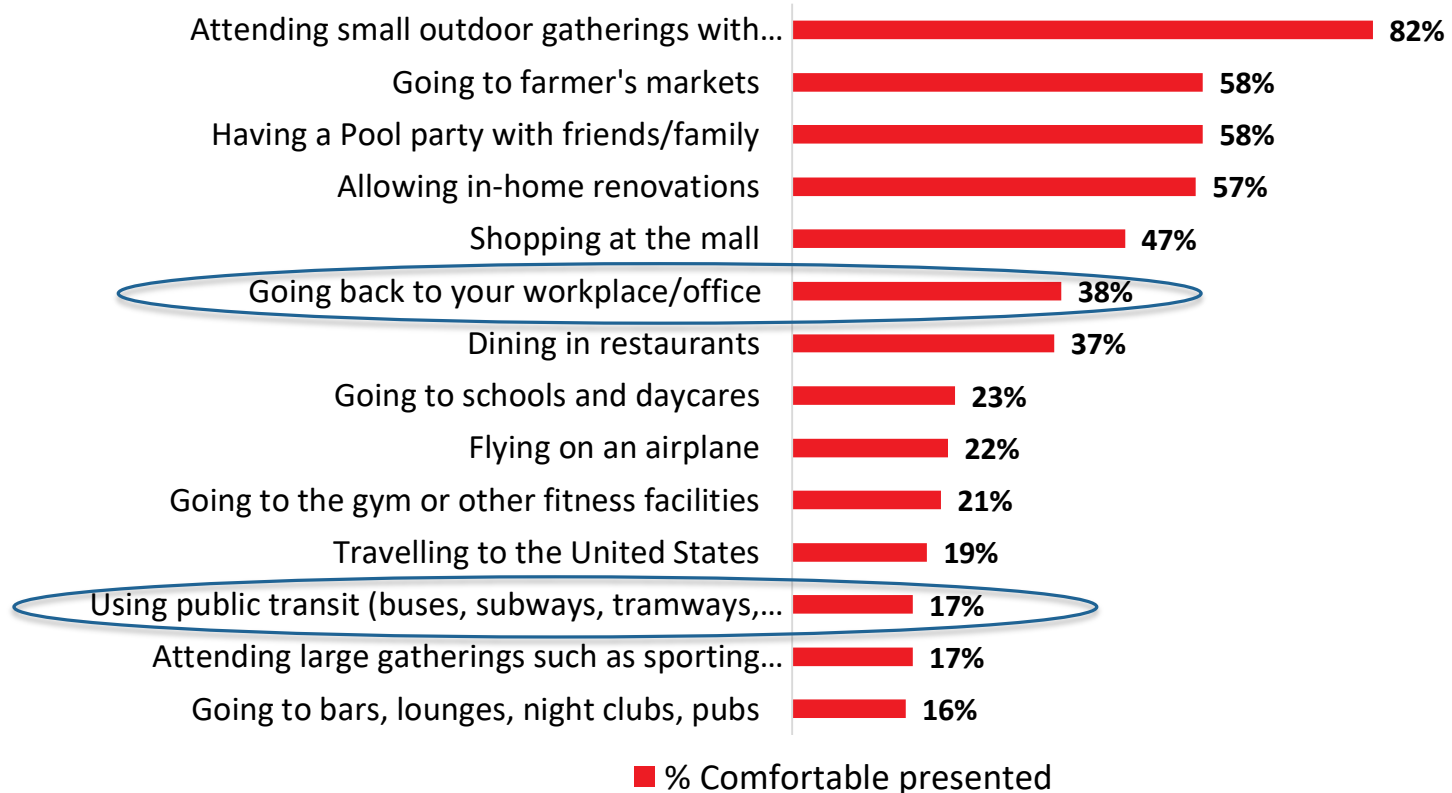
**Post-Pandemic -
Working downtown**



Q. Ordinarily (pre-pandemic) do you work or attend school downtown in a large city (pop. 200,000 or more)? Base : Employed/Student (n=1010)

Q. Which of the following work/school situations would you most prefer? Base : Working/Studying downtown (n=432)

LEVEL OF COMFORT WITH ACTIVITIES AFTER PROTECTIVE MEASURES ARE LIFTED



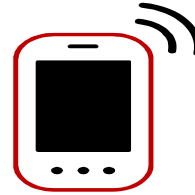
Over two-third of Canadians working from home found broadband and wireless services adequate, courier has scope to improve

Rural Canadians significantly more likely to say services **Inadequate**



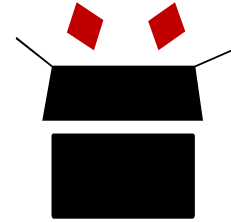
Broadband

77%



Wireless

77%



Courier

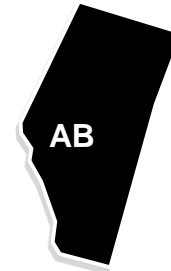
60%

% Saying Adequate

Similar
across provinces



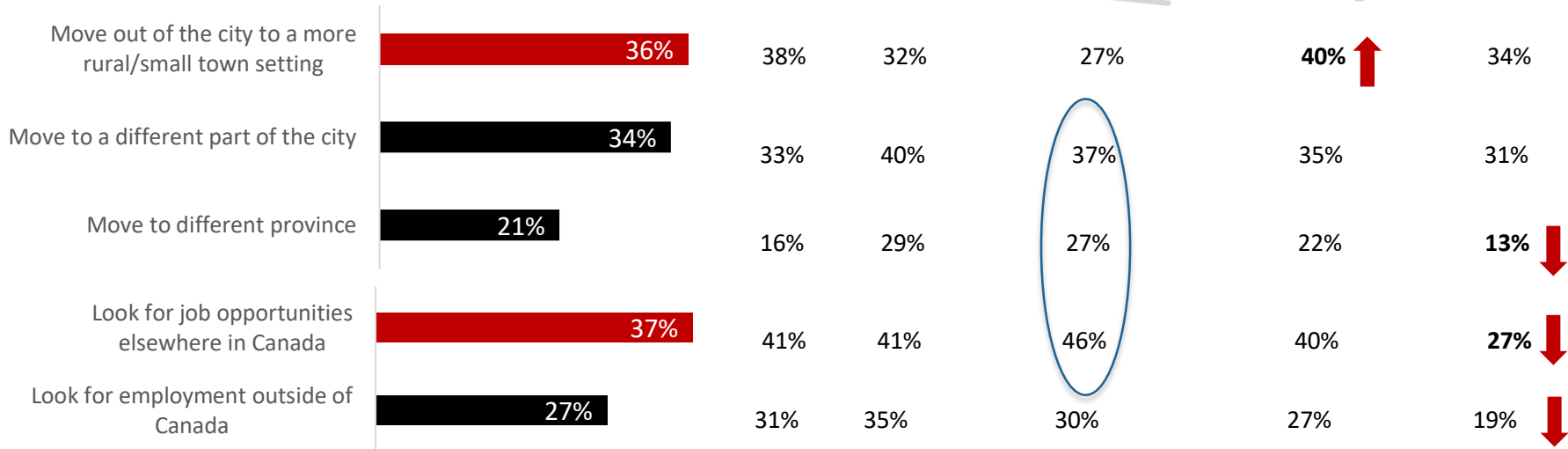
Strongest
85% adequate



Weakest
50% adequate

Given flexibility to work remotely, one-third Canadians would consider moving away from city or work elsewhere

In the scenario where working and/or study remotely is common.



18-34 year olds are more likely to say they will do all of the items above compared to older respondents

Q. Imagine a scenario where you can work and/or study remotely. Please indicate how likely you would be to consider the options listed in the table below.

Base : Employed/Students (n=1010)

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