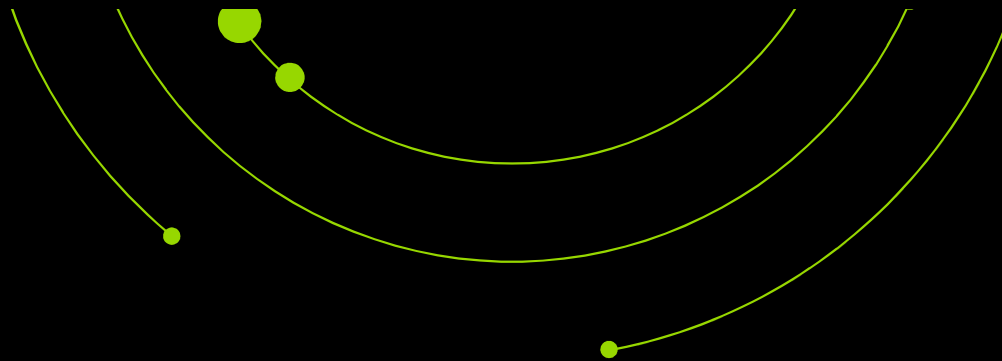


CANADIANS IN ISOLATION

EXPLORING THE IMPACT OF COVID-19 ON CANADIAN CONSUMERS

WAVE #2



Methodology

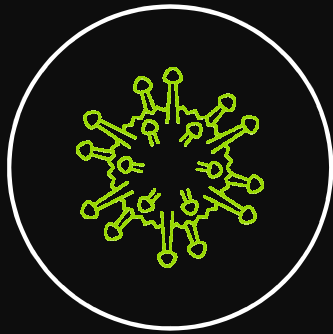
	Wave #1	Wave #2
Field Dates	March 27-30	April 10-14
Total Sample*	1013	1000
Men	505	493
Women	508	507
18-34	338	336
35-44	335	331
45-54	340	333

CORUS.

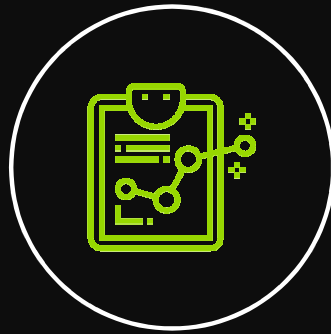
Canadians from English Canada

WAVE 2

Areas of Exploration



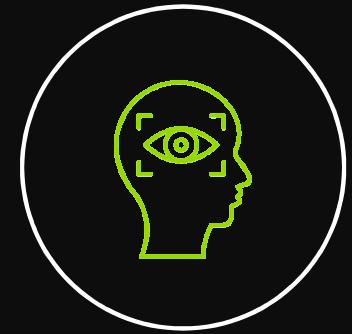
Feeling around &
perceptions of the
COVID-19 crisis



Managing the
information about
COVID-19

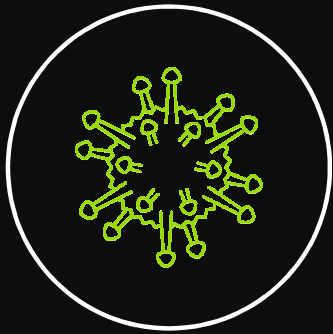


Economic impact to
consumers to date



Perceptions of
advertising

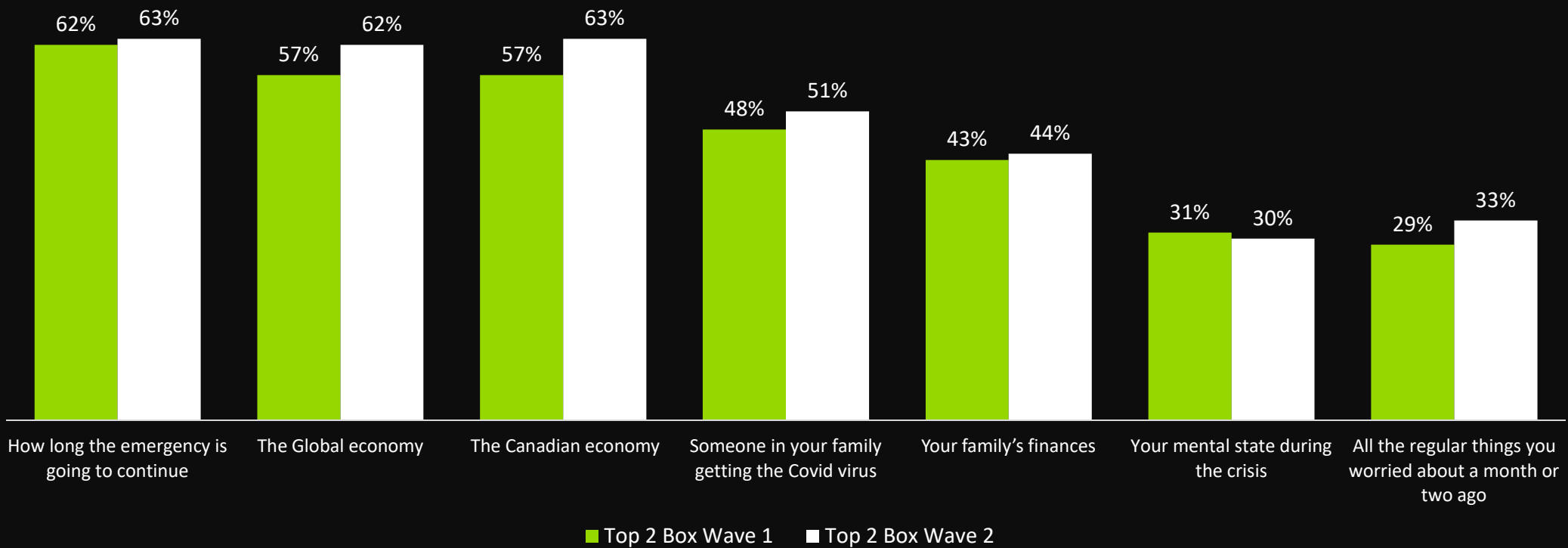
corus.



FEELING AROUND & PERCEPTIONS OF THE COVID-19 CRISIS

corus.

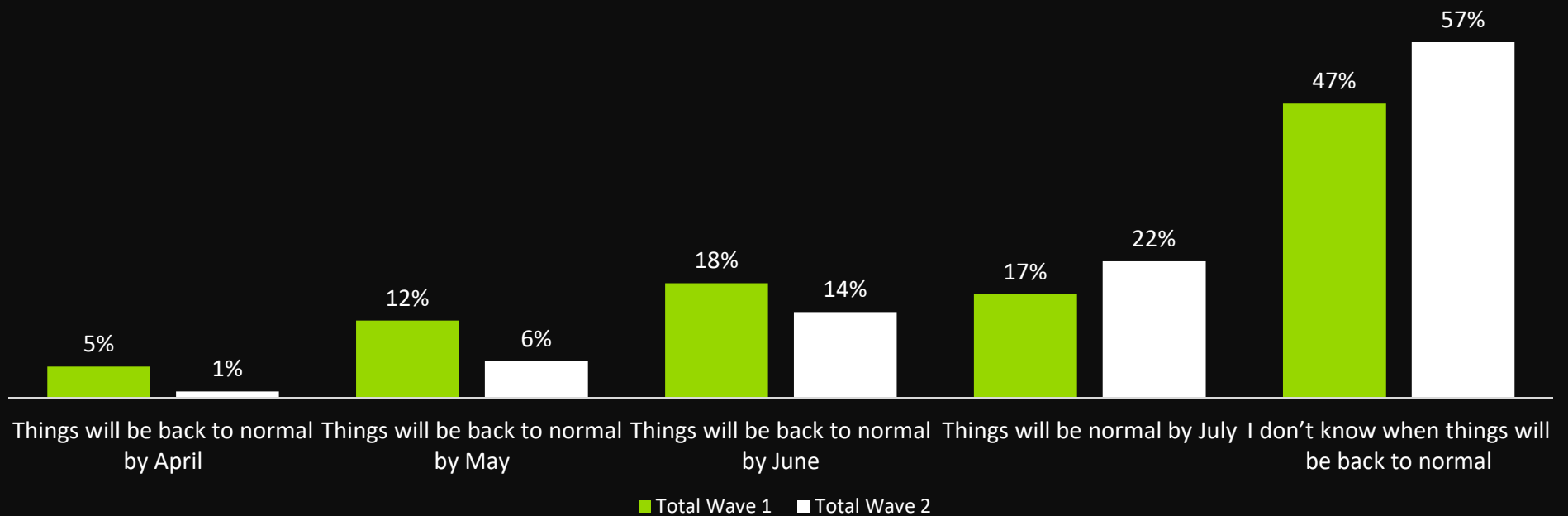
Increasing concern regarding the economic fall-out from the crisis



It's an unusual time. How worried are you right now about...

WAVE 2

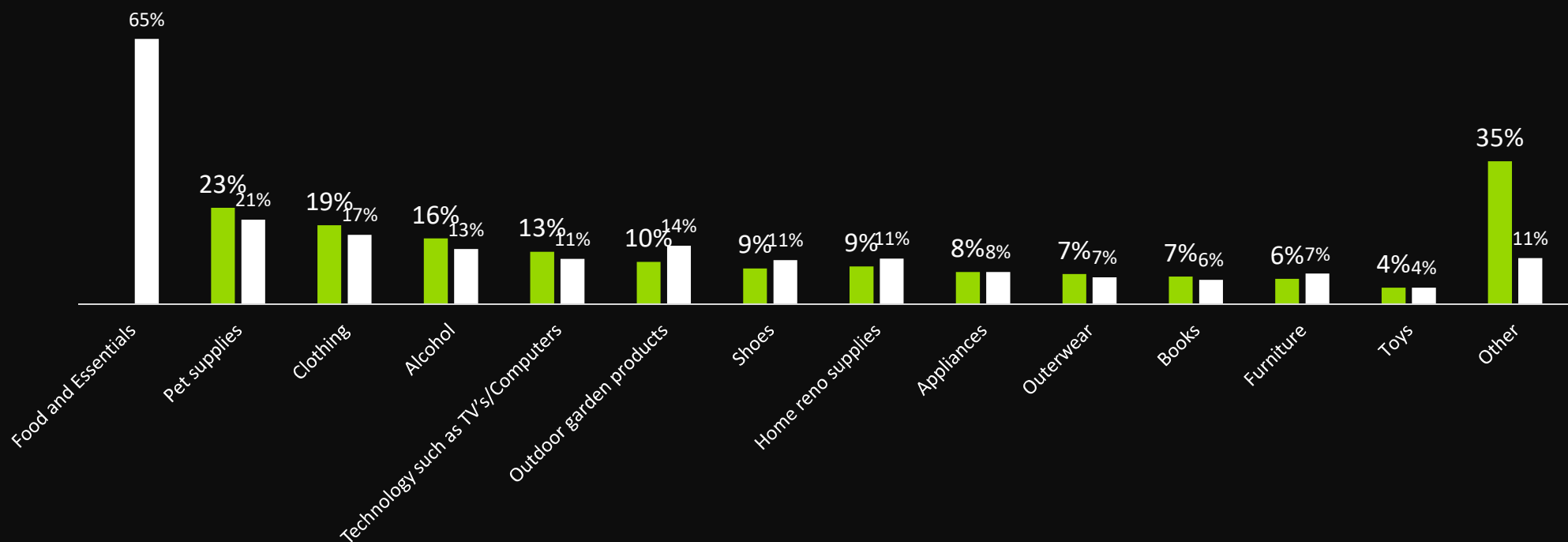
Increased uncertainty regarding when we will be back to normal



How long do you think that we will need to be Social Distancing?

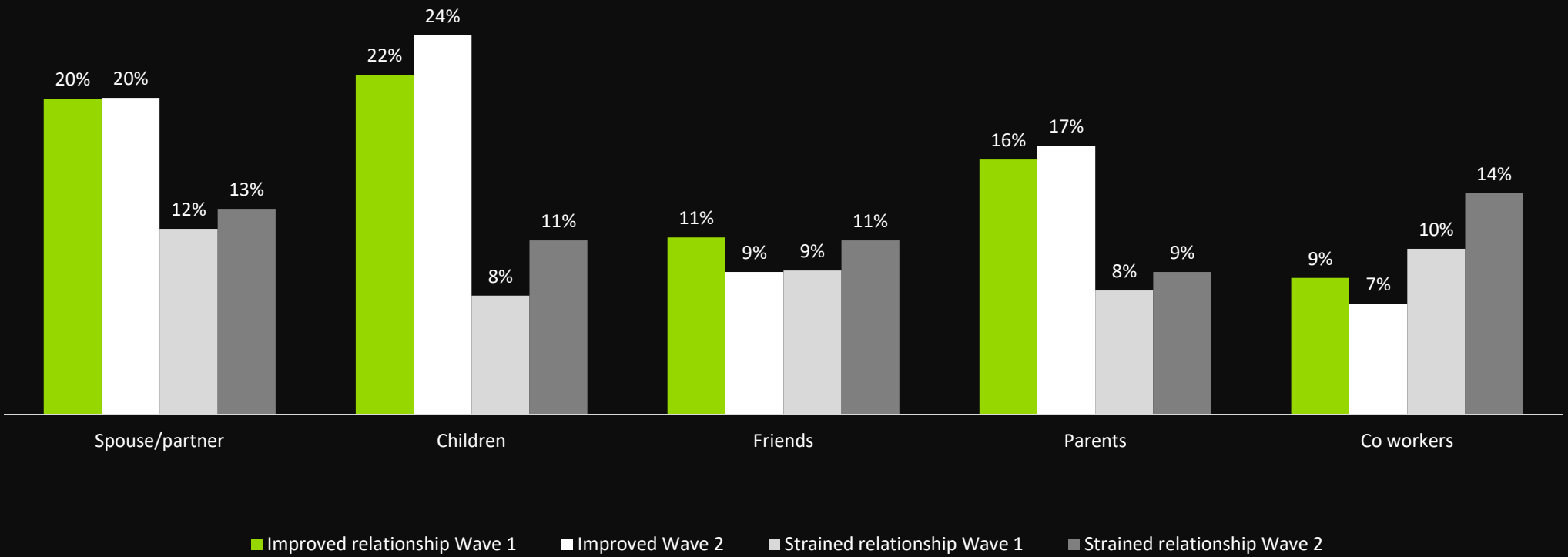
WAVE 2

There's a concern about food/essentials supply chains



If social distancing and self-isolation lasts for more than a few weeks, are you concerned about being able to purchase any of

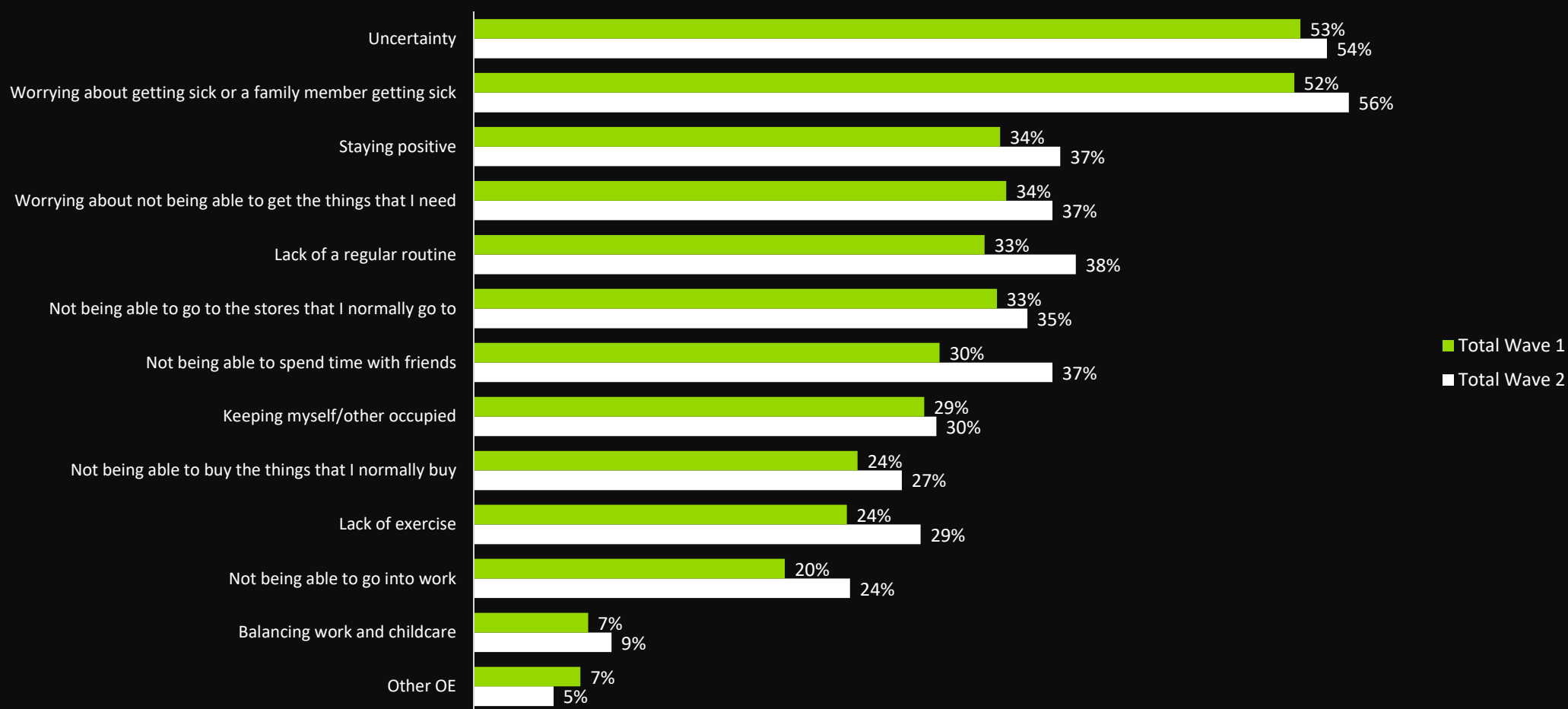
Relative stability regarding relationships



We've seen media reports about a spike in divorces in China when the quarantine was eased up... How do you feel the current restrictions have impacted your relationship with your...

WAVE 2

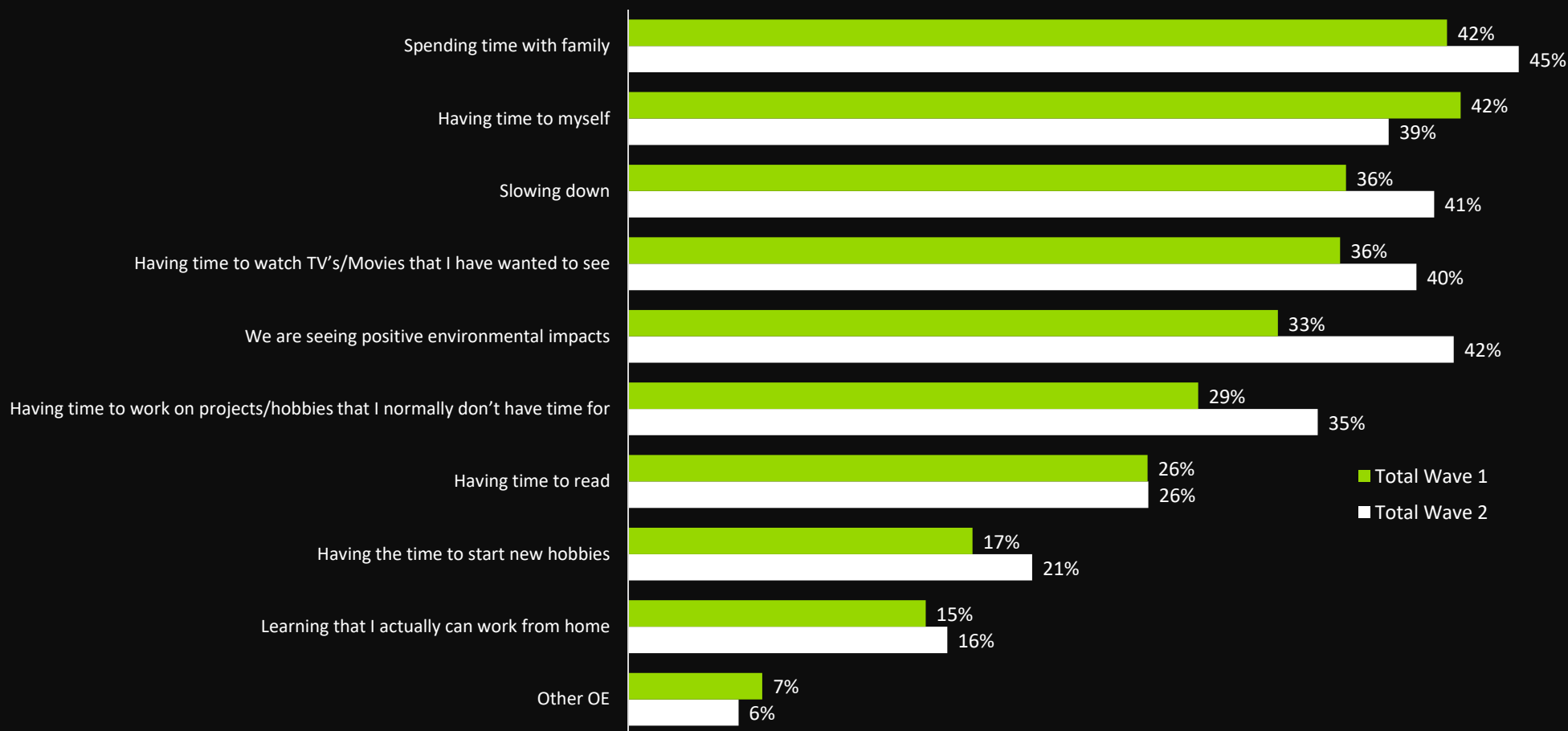
Self-isolation is slightly more challenging than it was 2 weeks ago



What's the hardest part about self-isolation?

WAVE 2

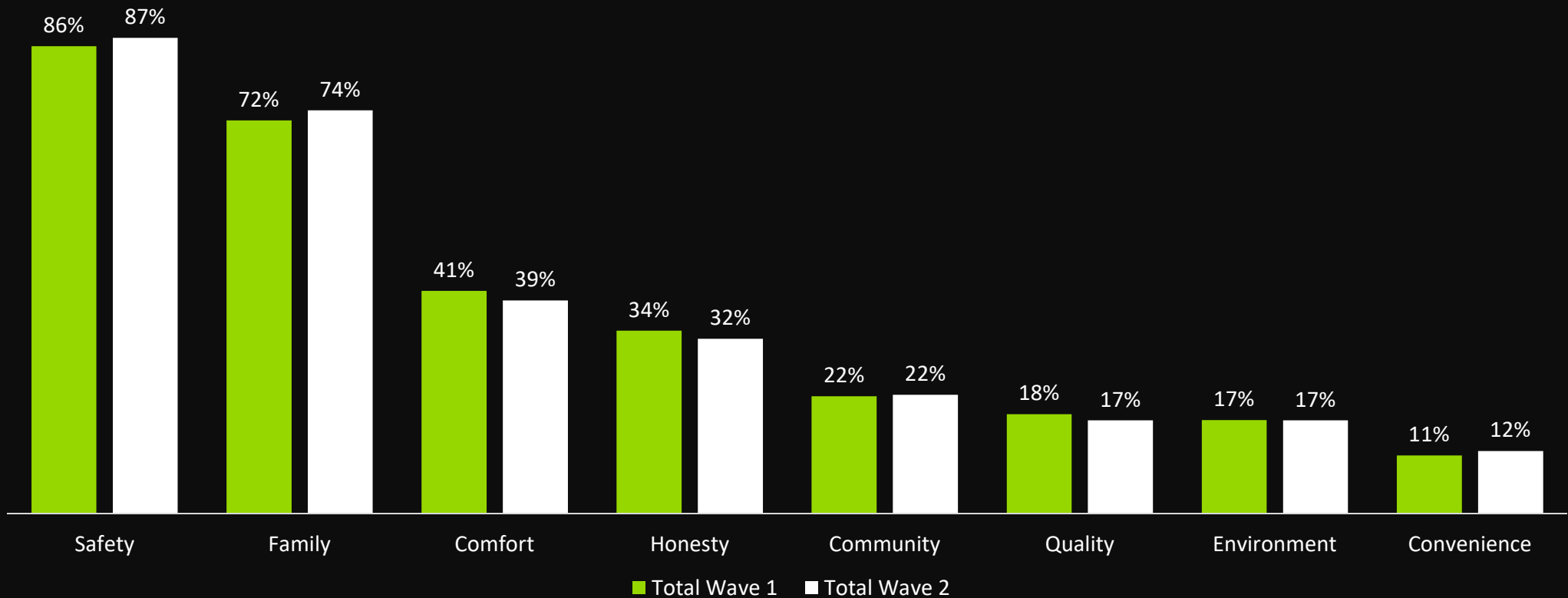
Some increase to benefits – especially around the environment



What's the best part about self-isolation?

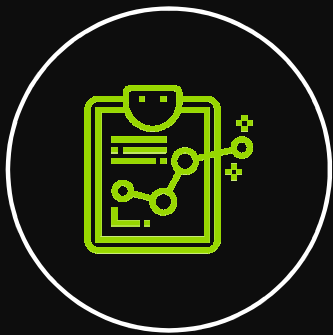
WAVE 2

Not surprisingly, the values of “safety” and “family” are holding



Right now which of the following values would you say are most important to you? (pick 3)

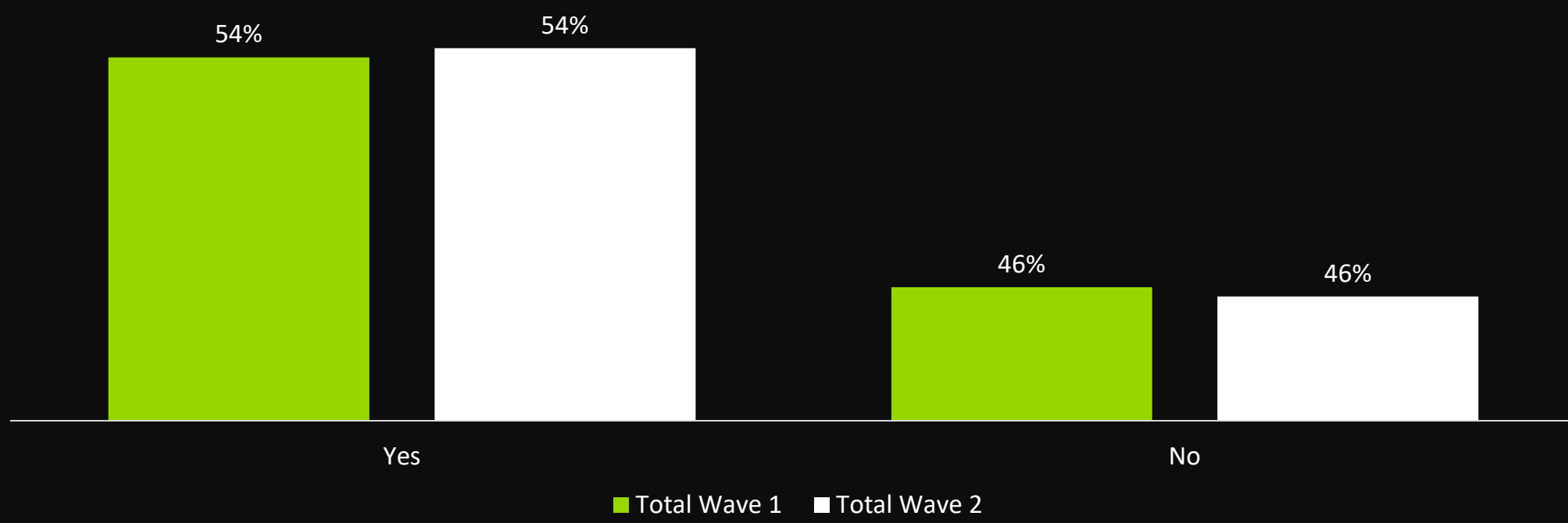
WAVE 2



MANAGING THE INFORMATION ABOUT COVID-19

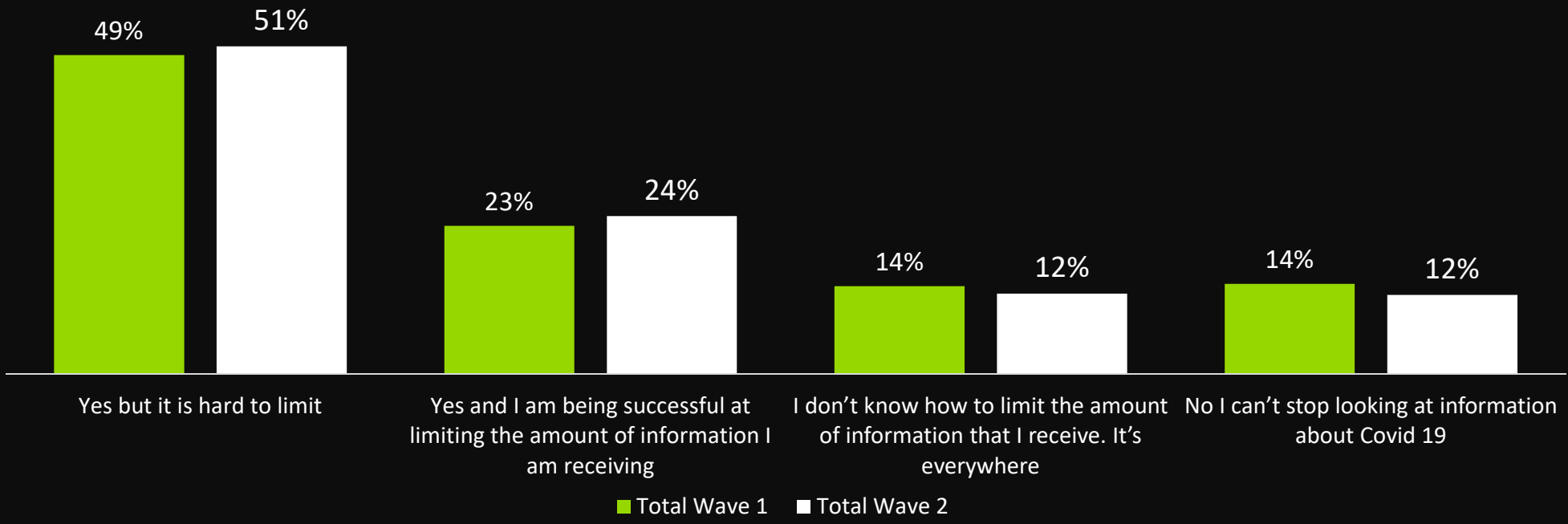
corus.

Over half of all respondents still report feeling overwhelmed by the amount of information they are receiving about COVID-19



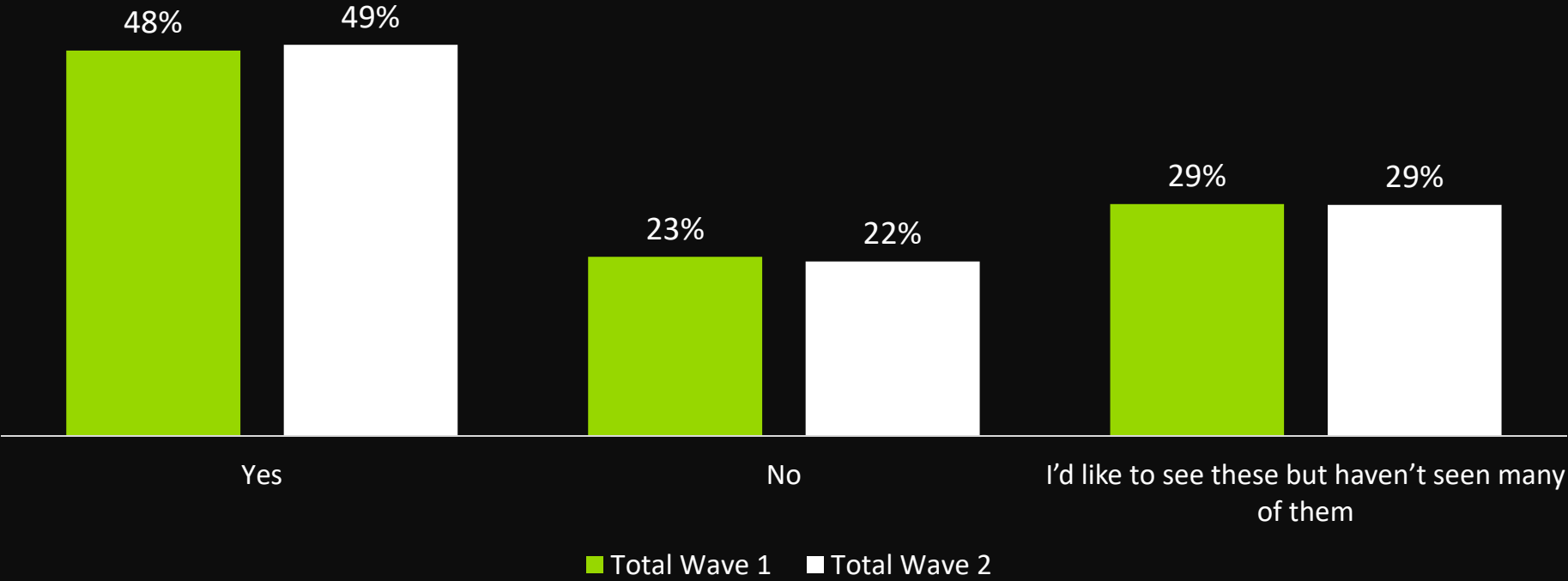
Do you feel overwhelmed by the amount of information you are receiving about COVID-19?

They are trying to limit their exposure to the information but are struggling to do so

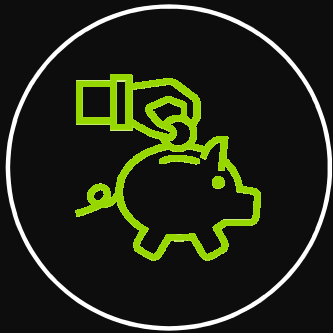


(if yes) Are you trying to limit the amount of information that you receive about COVID-19?

Canadians are looking for reflections of “normal life”



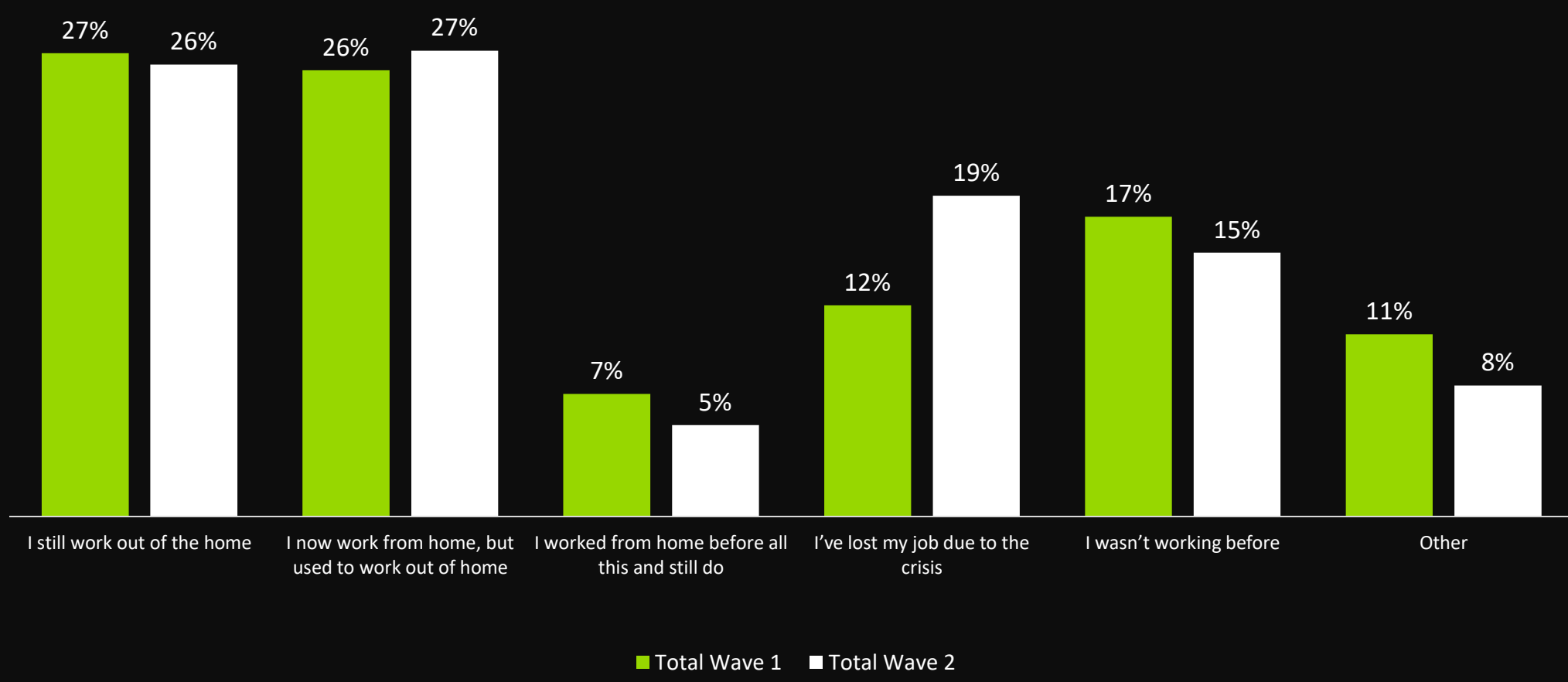
Do you find it helpful to see “normal” messages or stories that reflect normal life or normal life in the near future such as summer etc.



ECONOMIC IMPACT TO CONSUMERS TO DATE

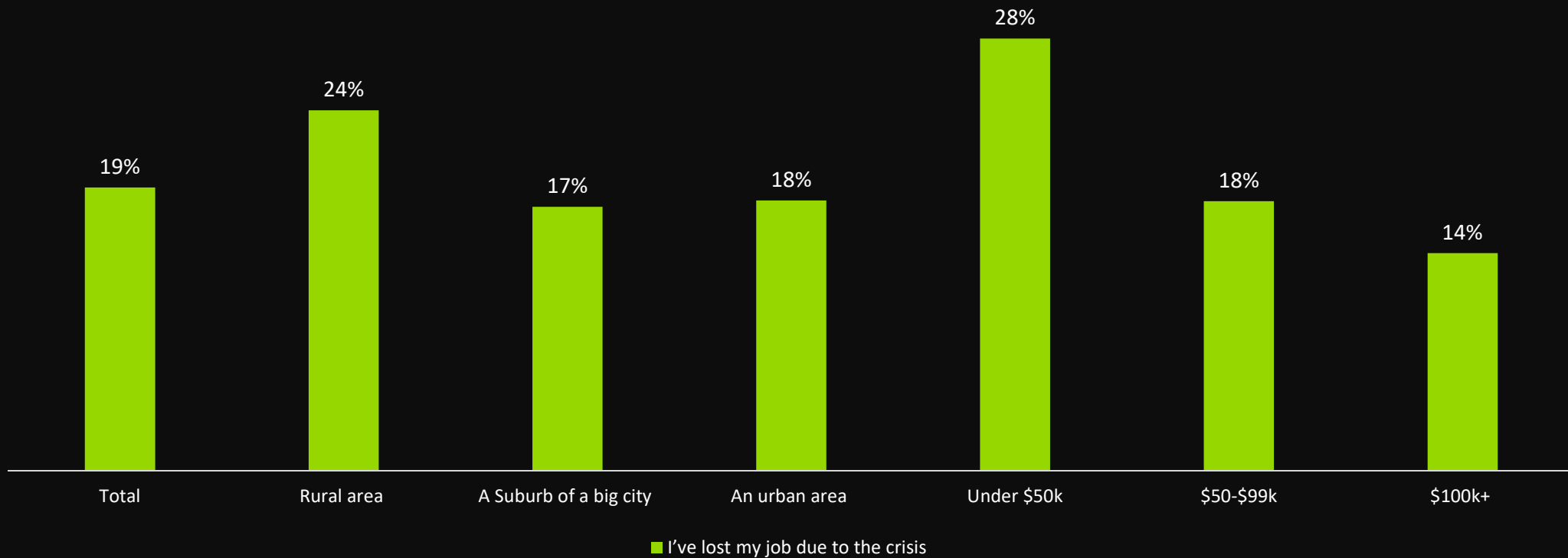
corus.

19% are now reporting having lost their job

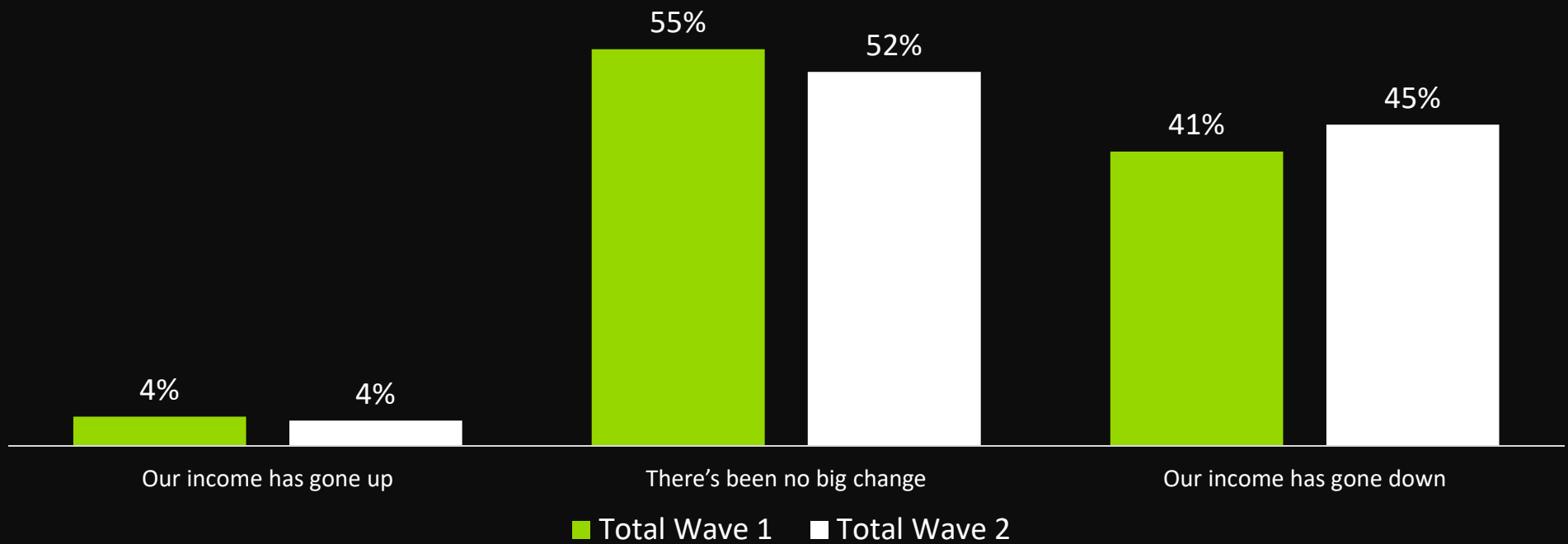


How has COVID-19 impacted your work?

They are more likely to come from rural communities or households that earn under 50K a year



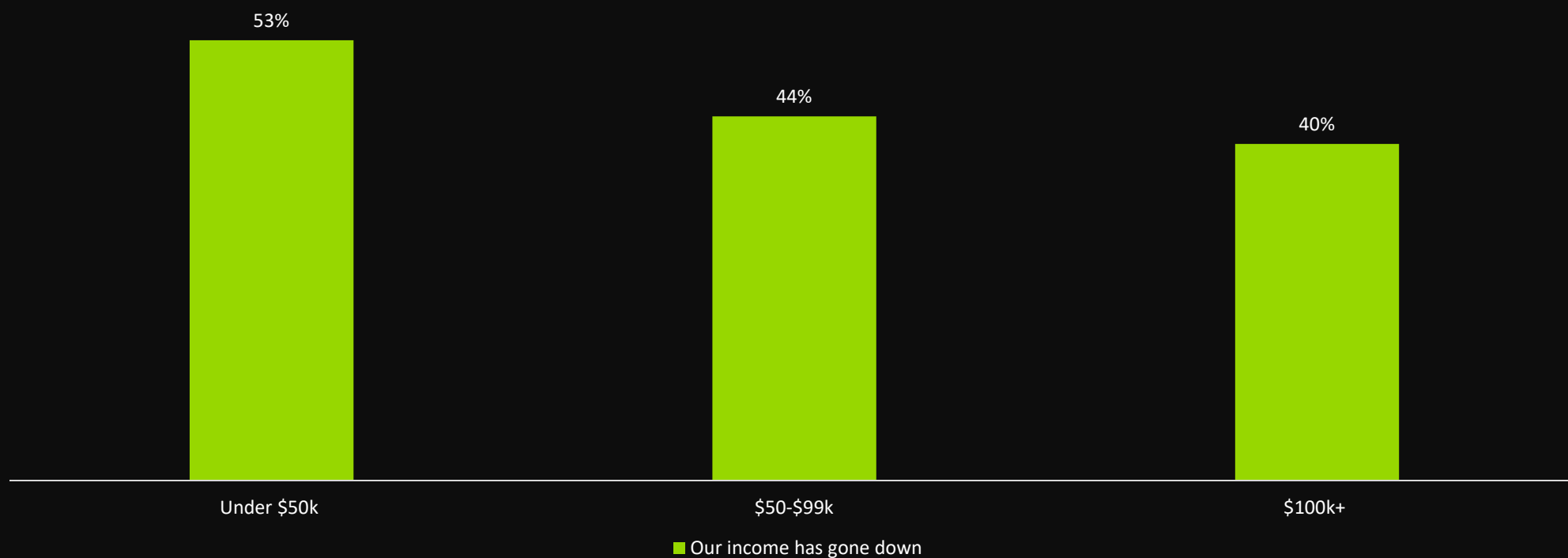
But 45% are now reporting a decrease in income



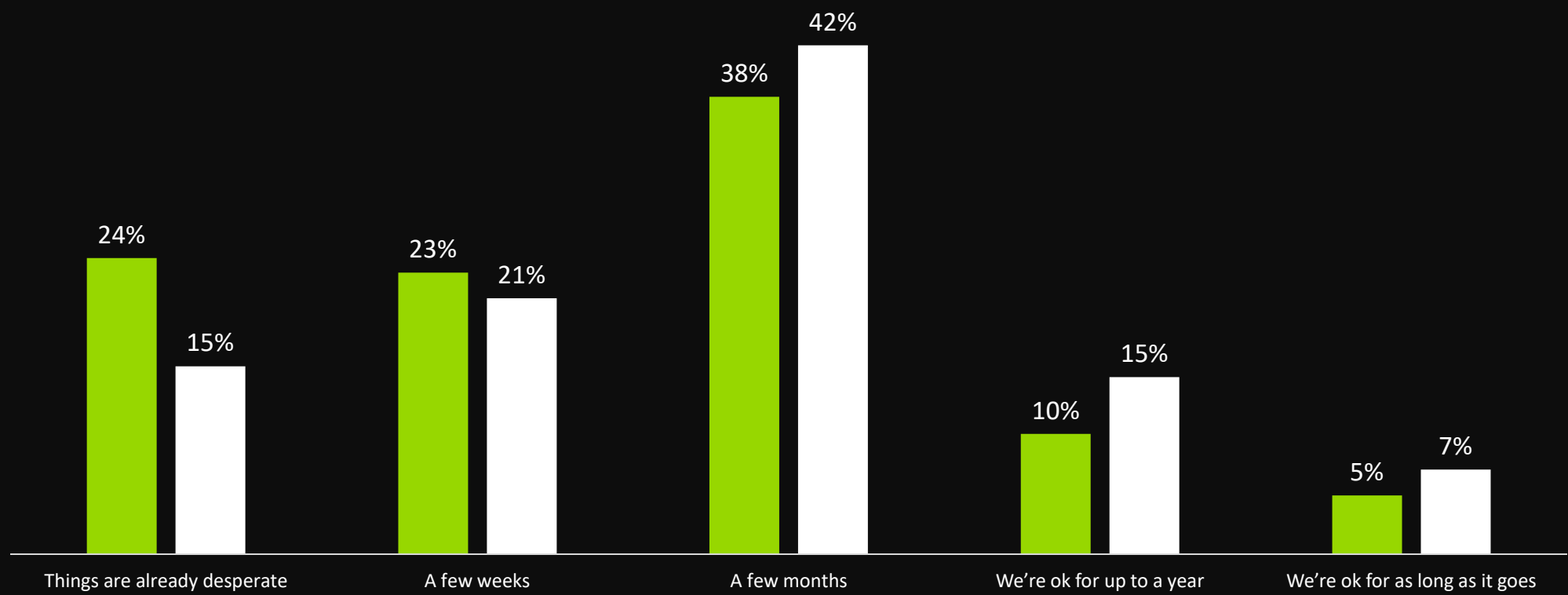
And how has it impacted your family's income?

WAVE 2

This is also more prevalent in those homes with a HHI under 50K

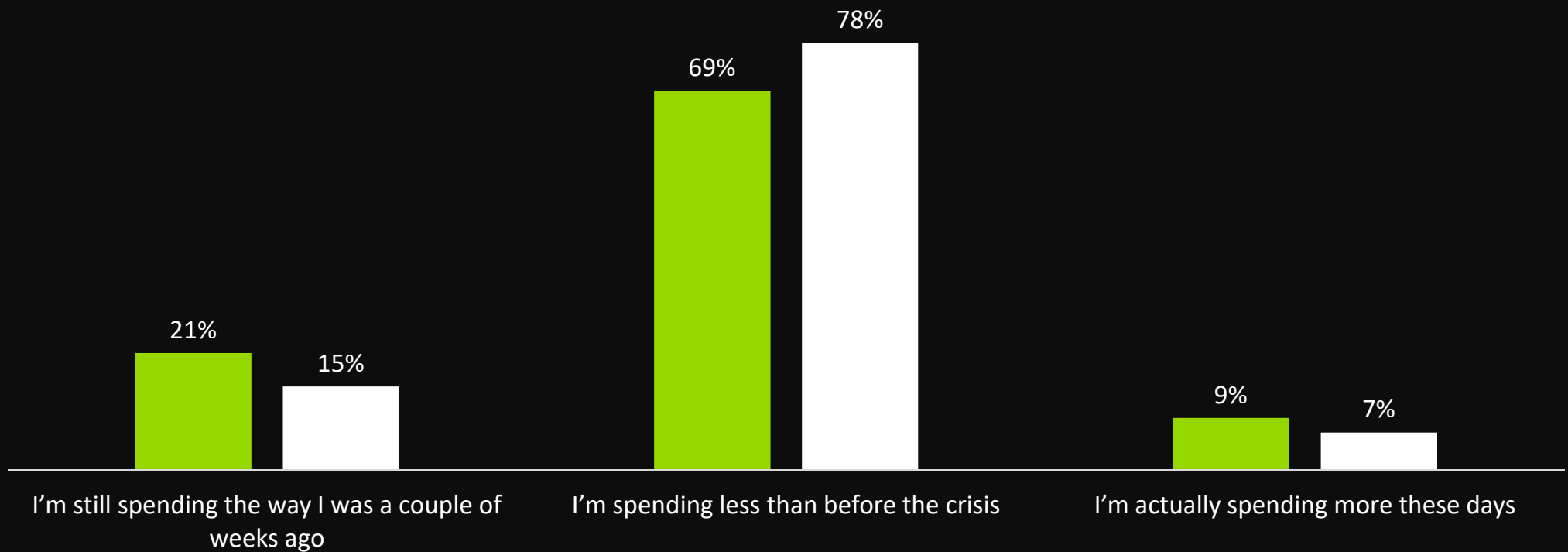


We may be seeing the impact of government programs



IF GONE DOWN. How long can you handle the reduced income before things become really desperate?

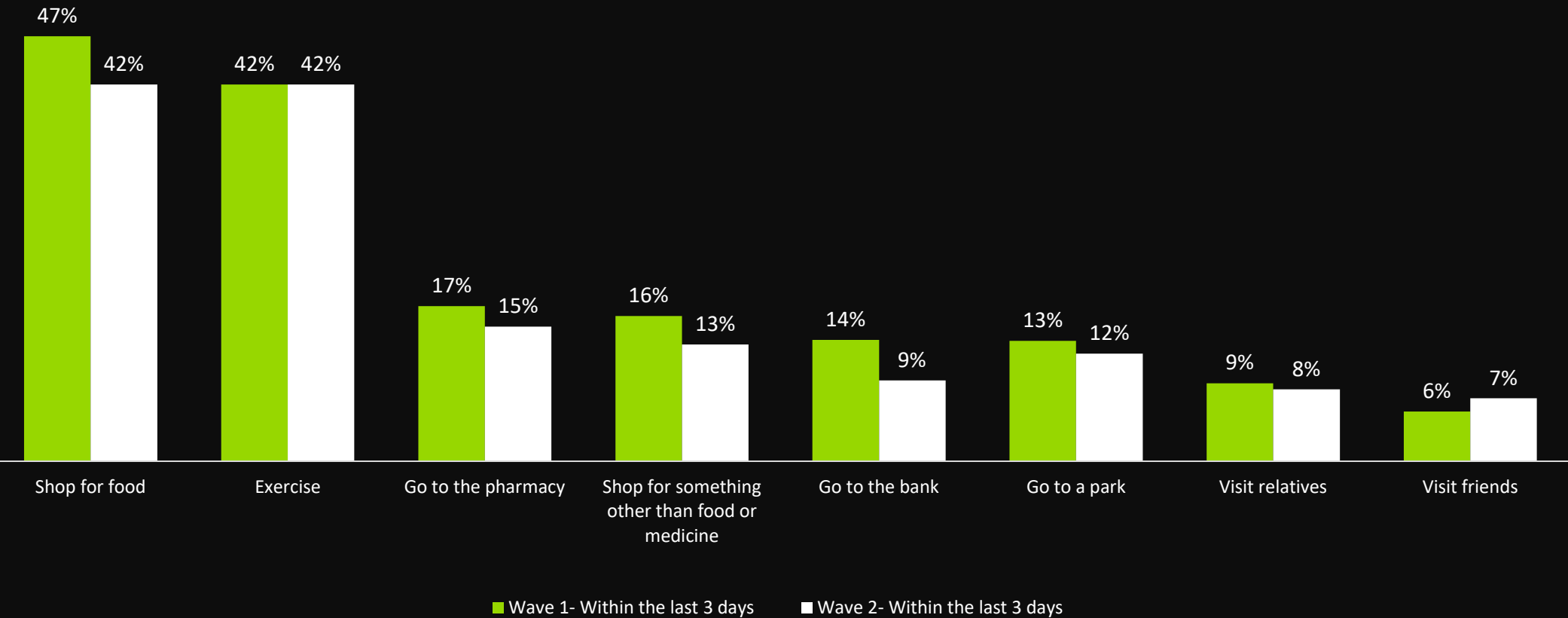
Most respondents report that they are currently spending less



How are you approaching your spending right now?

WAVE 2

Shopping for food & exercising are the most common activities Canadians are leaving their home to do



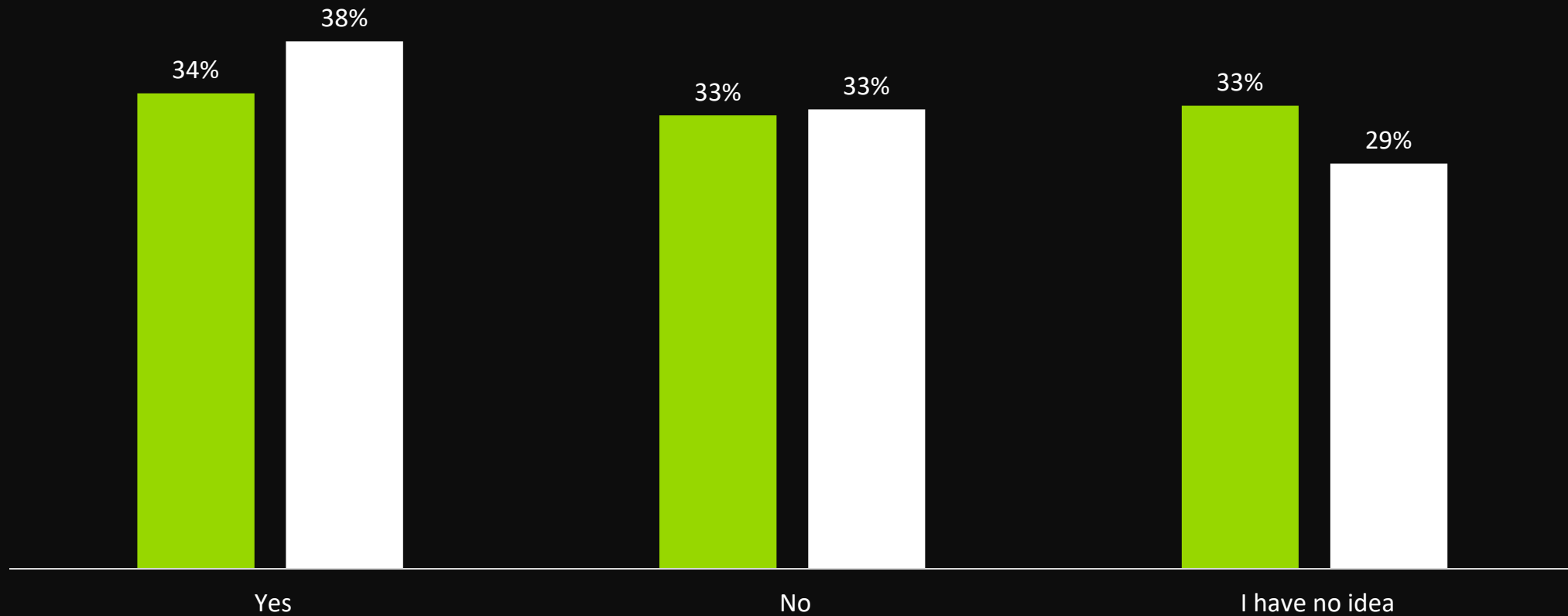
When was the last time you left your home to do the following?

More Canadians are picking up and ordering in food



Which of these have you done since social distancing started?

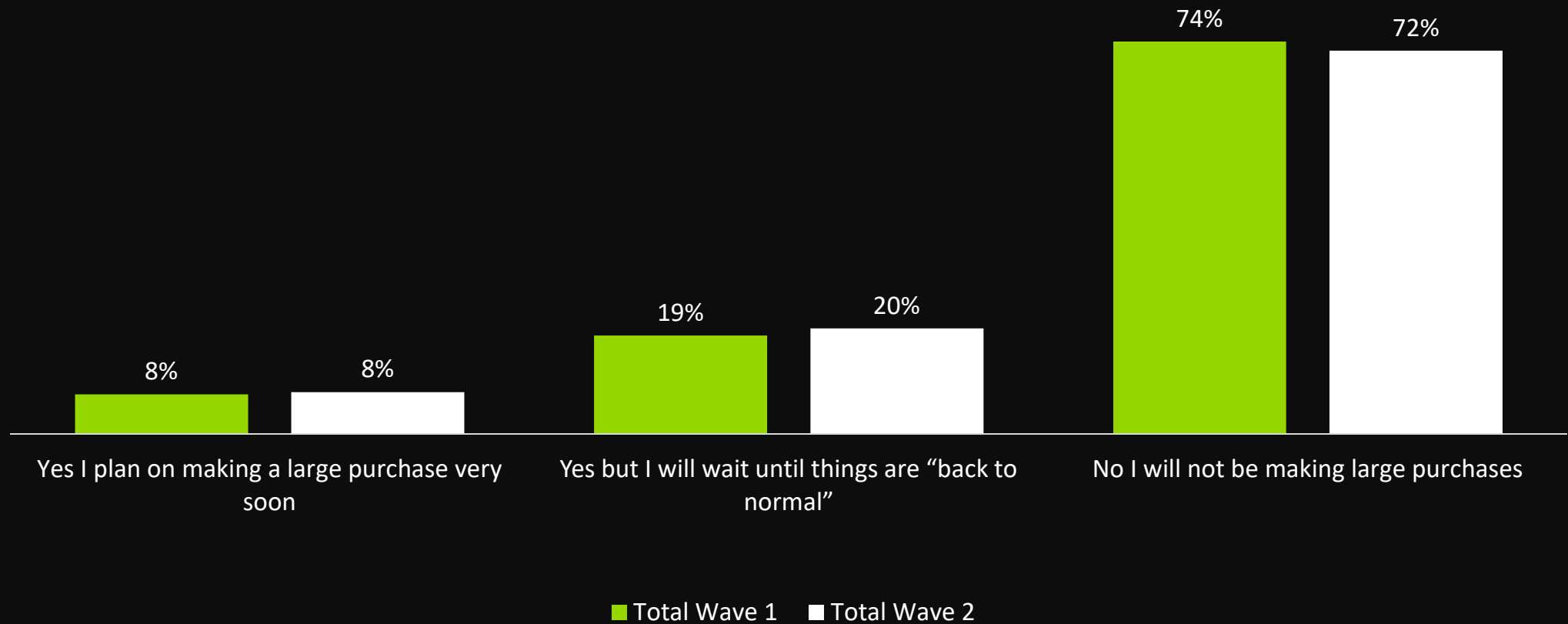
38% of respondents think that they will benefit form lower interest rate & another 29% are not sure



Do you think that you/your family will benefit from lower interest rates?

WAVE 2

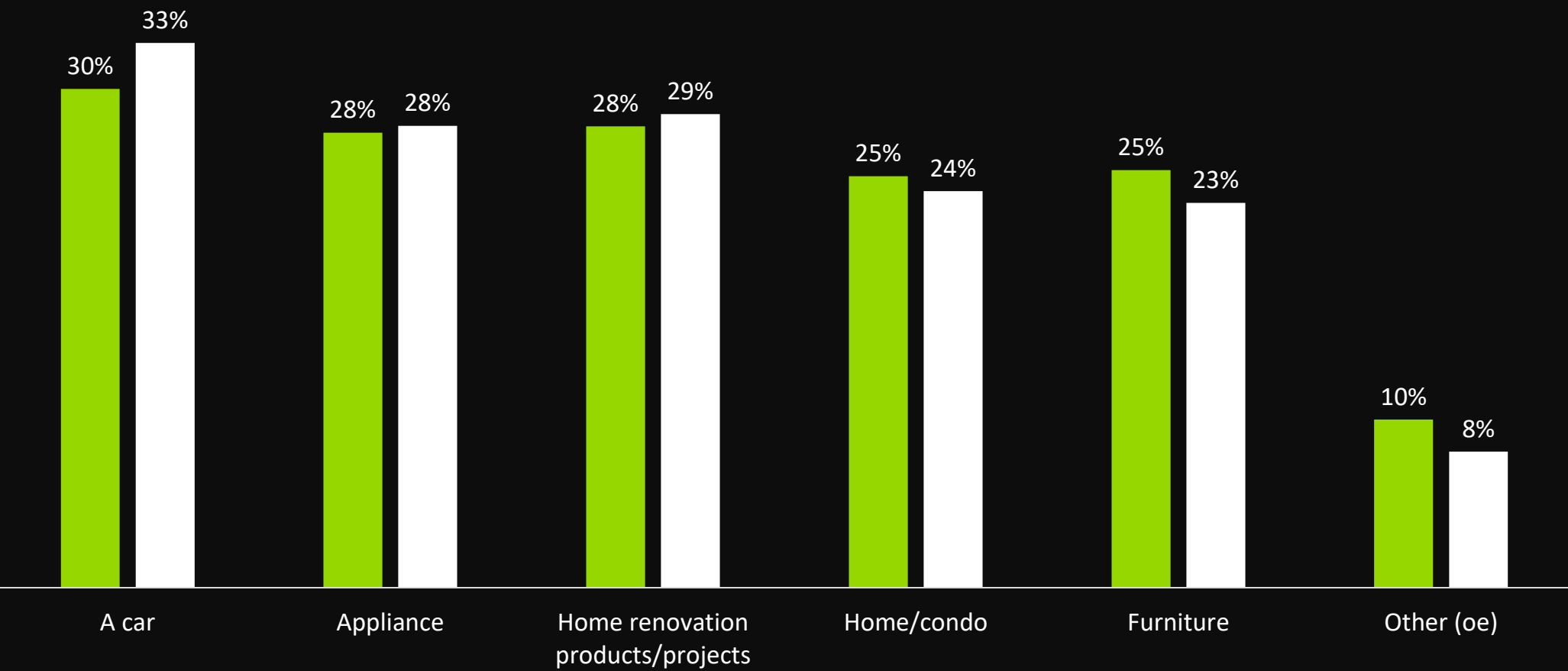
28% of respondents intend on making a large purchase in the near future



(if yes) Do you intend on making a large purchase now that interest rates are lower?

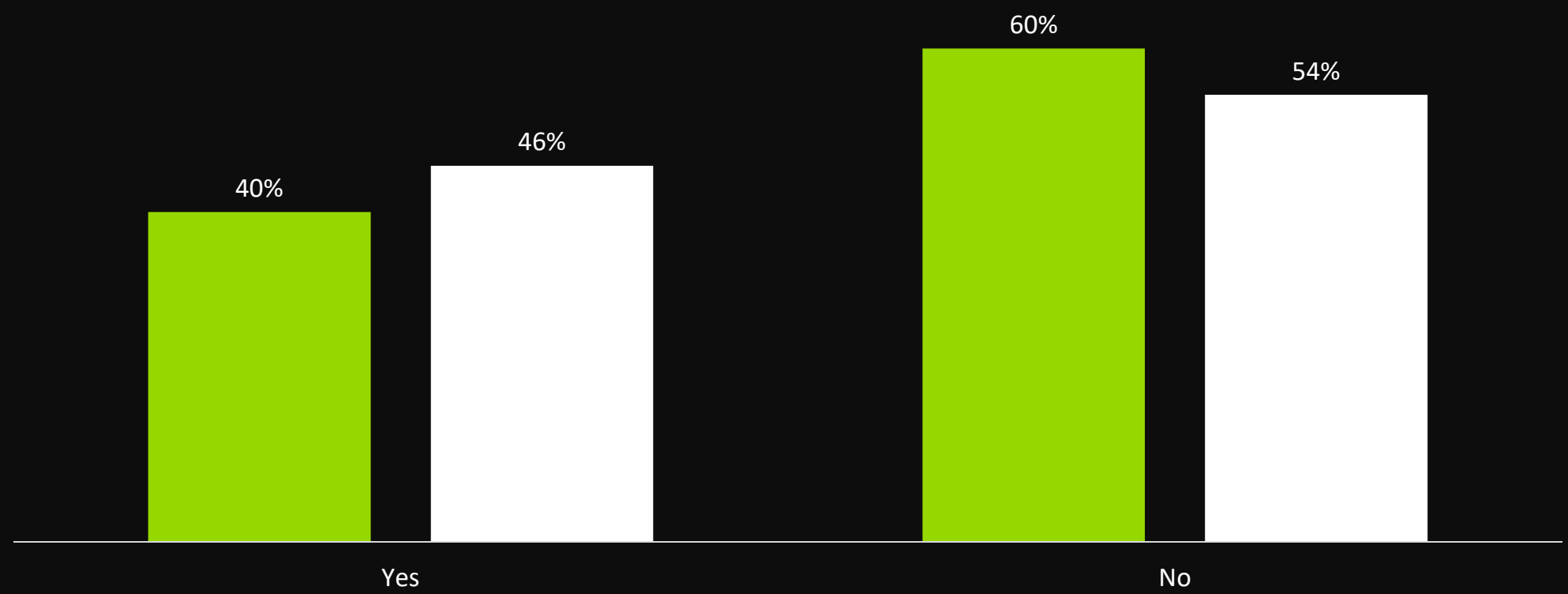
WAVE 2

Intended purchases span categories



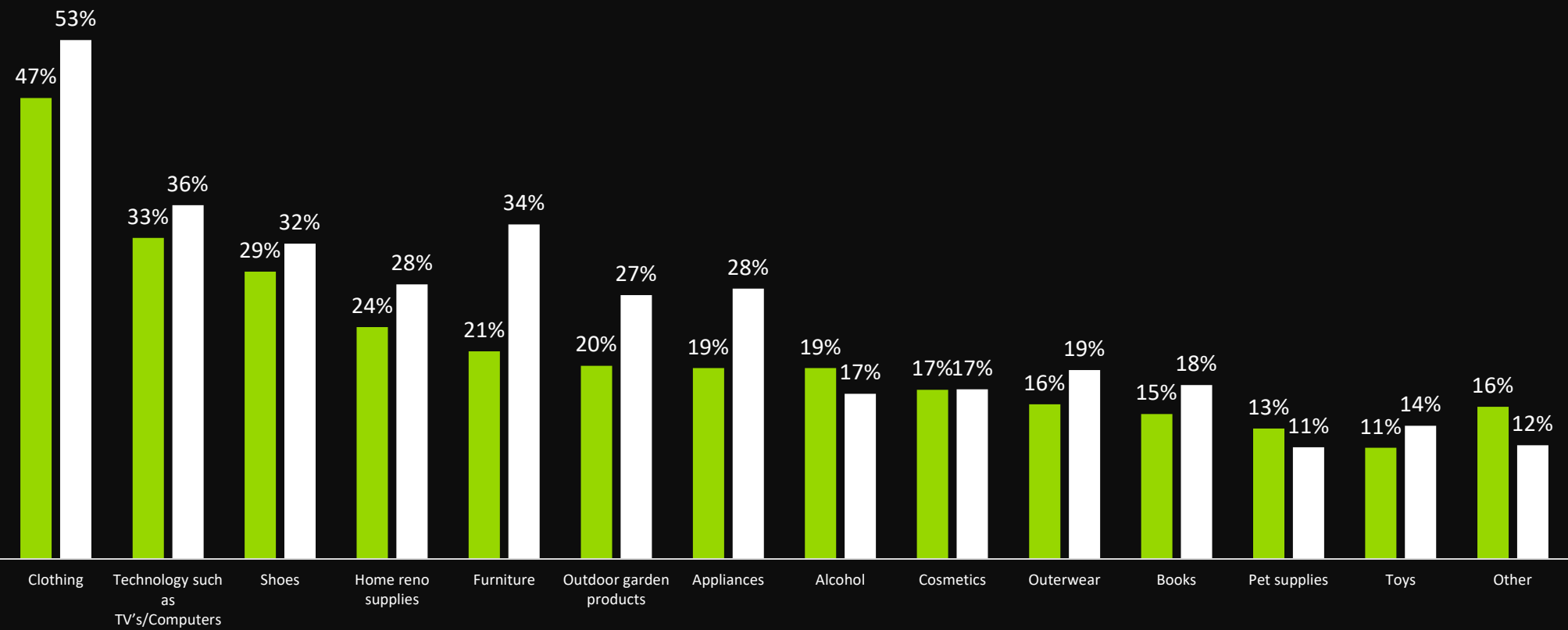
(if yes) What do you intend on purchasing? (select all)

46% of respondents have now started thinking about what they are going to buy once things go back to “normal”



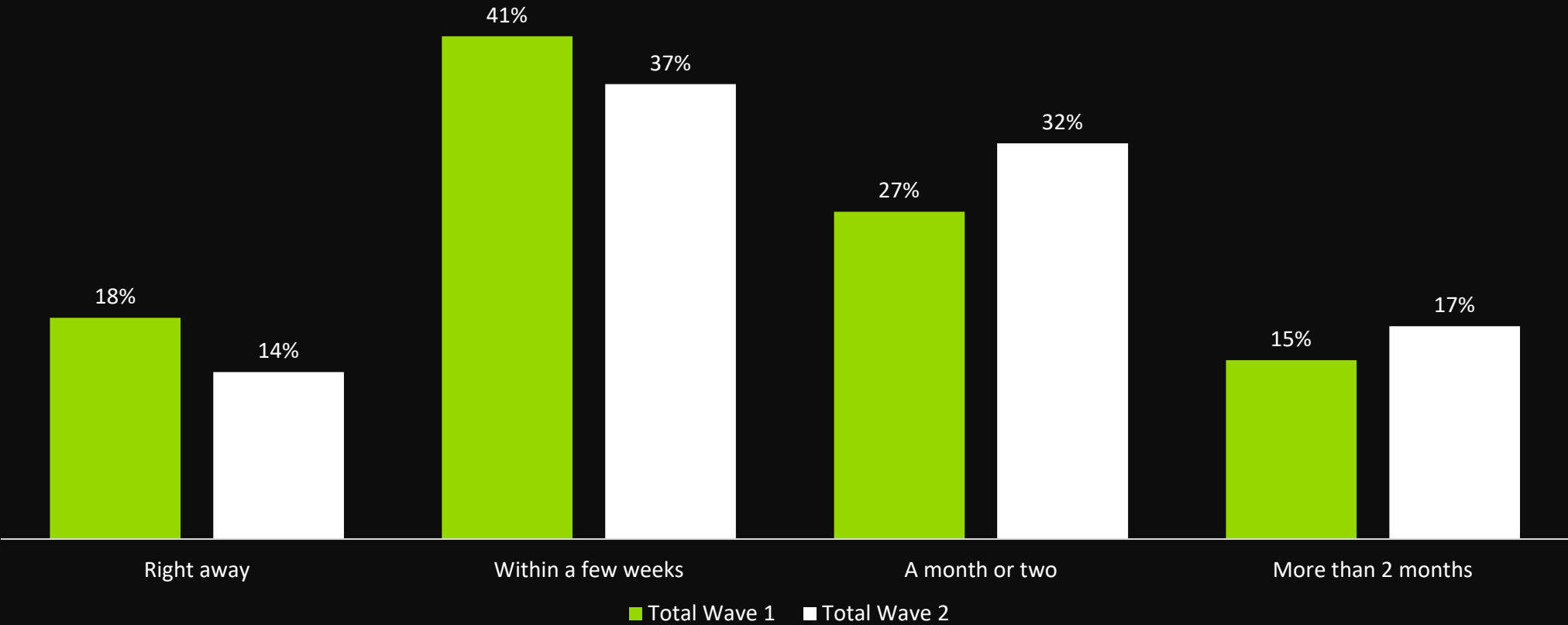
Have you started thinking about things you plan to buy once things go back to “normal”?

Some changes in the categories that consumers are thinking about

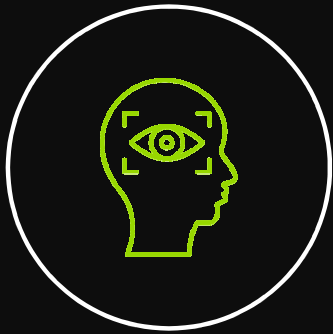


IF YES. What things are on your list of things to buy after this is over?

Small changes in when they expect to be spending post crisis



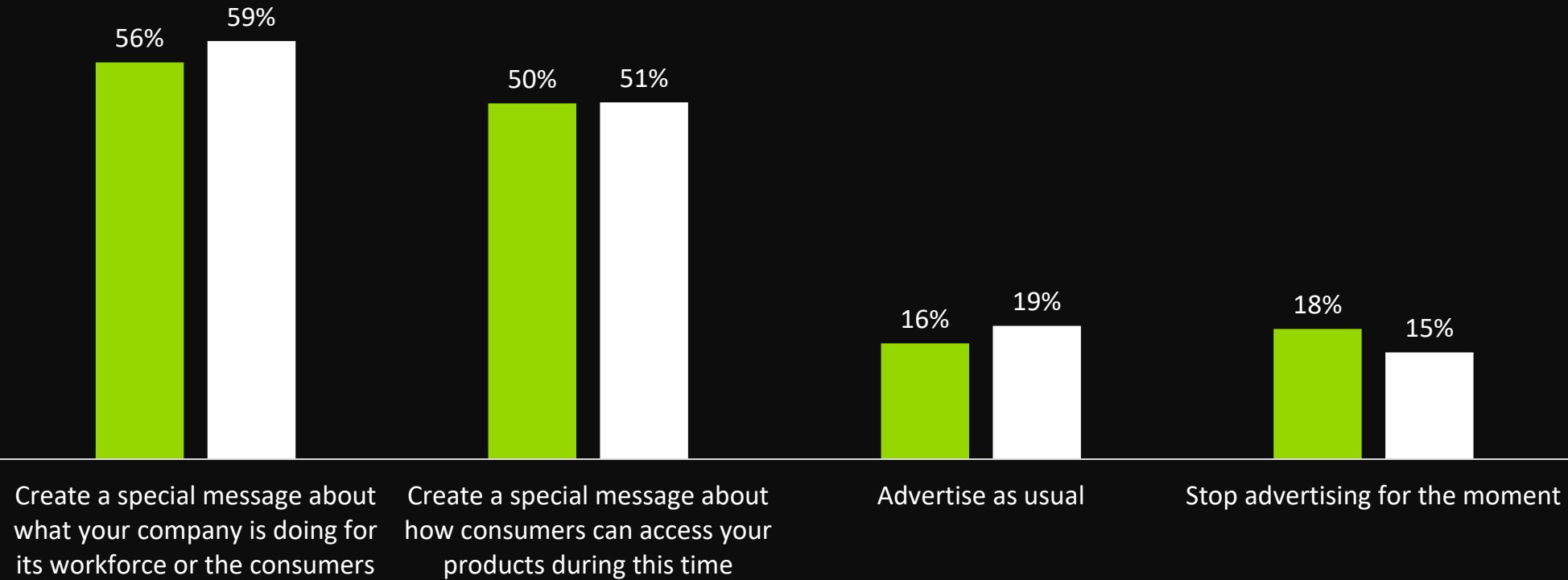
IF YES. How long after the crisis is over do you think you'll wait to start buying things on this list?



PERCEPTIONS OF ADVERTISING

corus.

If they were a marketer, most respondents said that they would create a special message

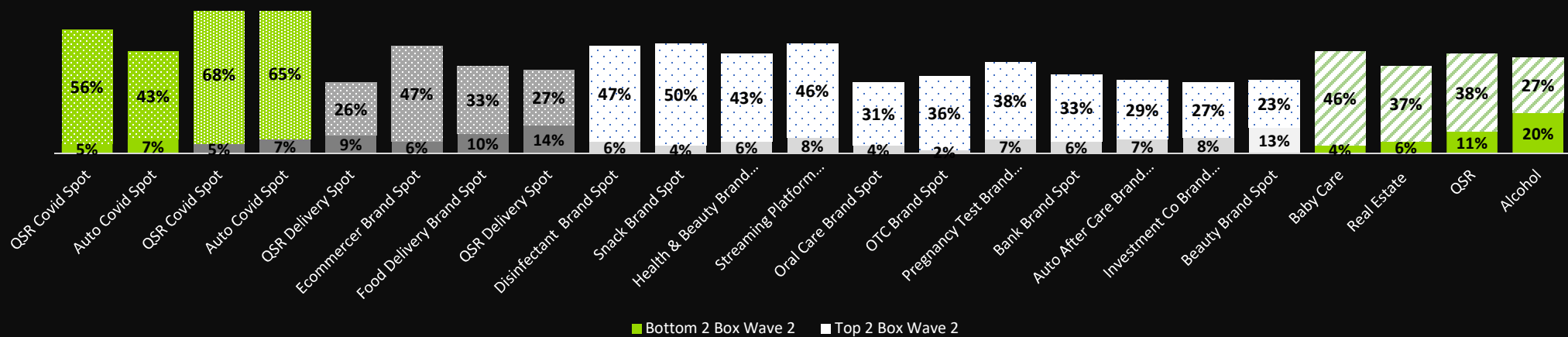
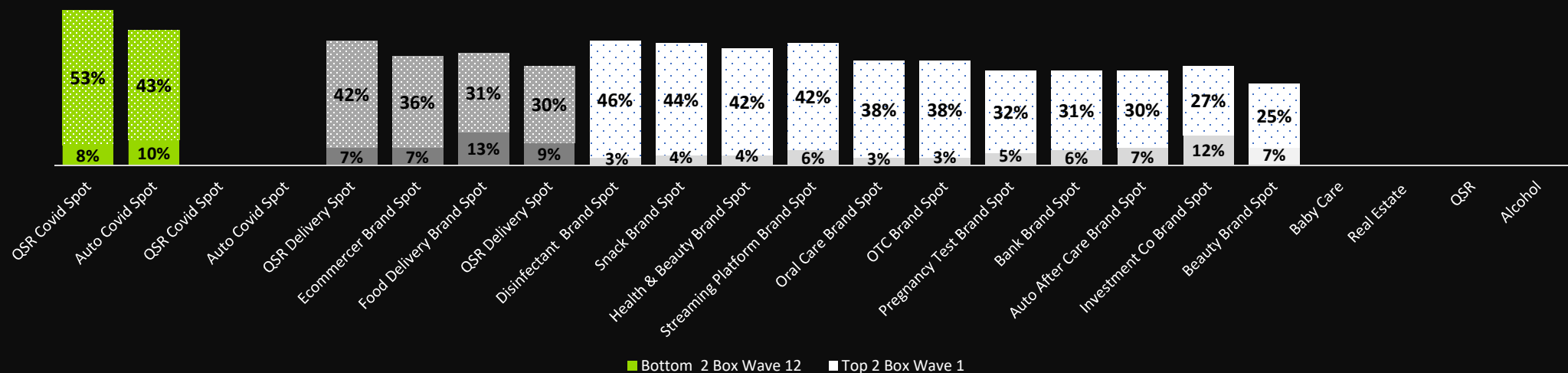


If you were an advertiser what would you do right now?

WE DID AN ASSESSMENT OF 17 DIFFERENT
COMMERCIALS IN WAVE #1 & 23 IN WAVE #2

WHAT WE FOUND WAS THAT A “SPECIAL” COVID
SPOT IS NOT REQUIRED IN ORDER TO HAVE A
POSITIVE BRAND IMPACT

corus.



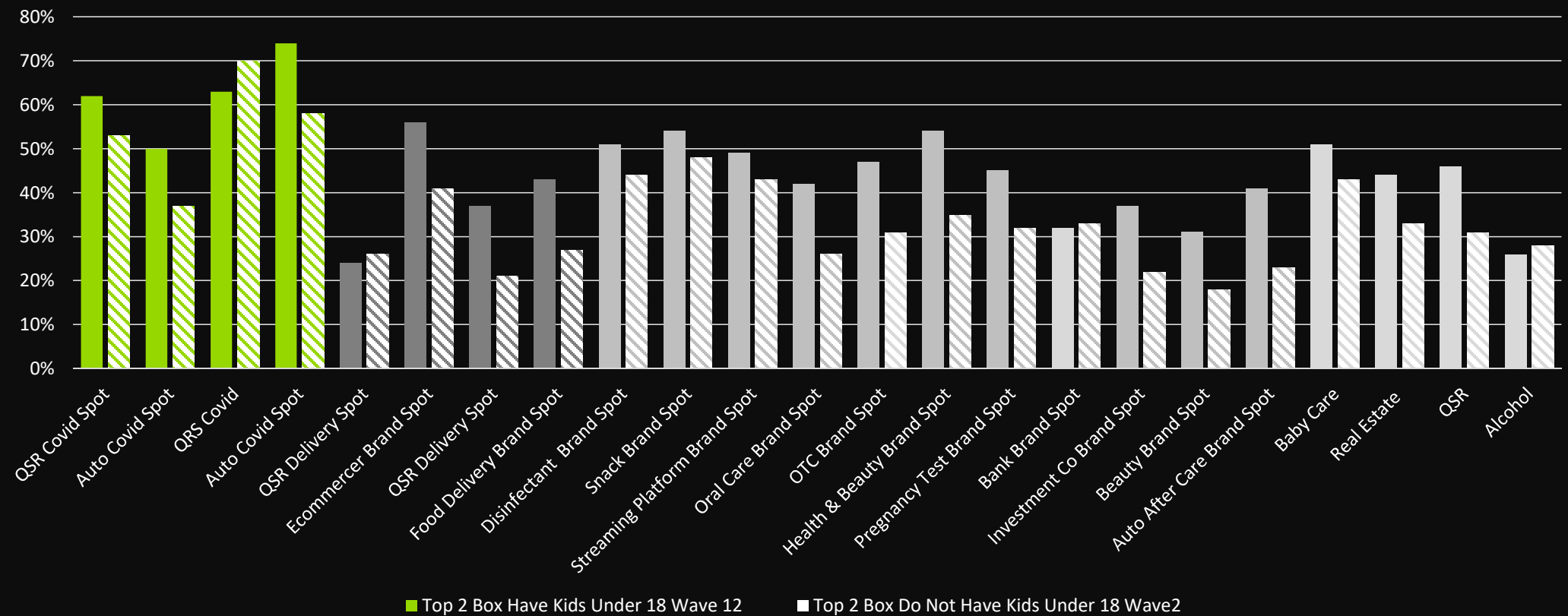
Did this spot make you feel more or less positive about the ...brand?

WAVE 2

DEMOGRAPHICS ACCELERATE POSITIVE BRAND MOMENTUM

corus.

We see spots higher for those respondents who have children under the age of 18



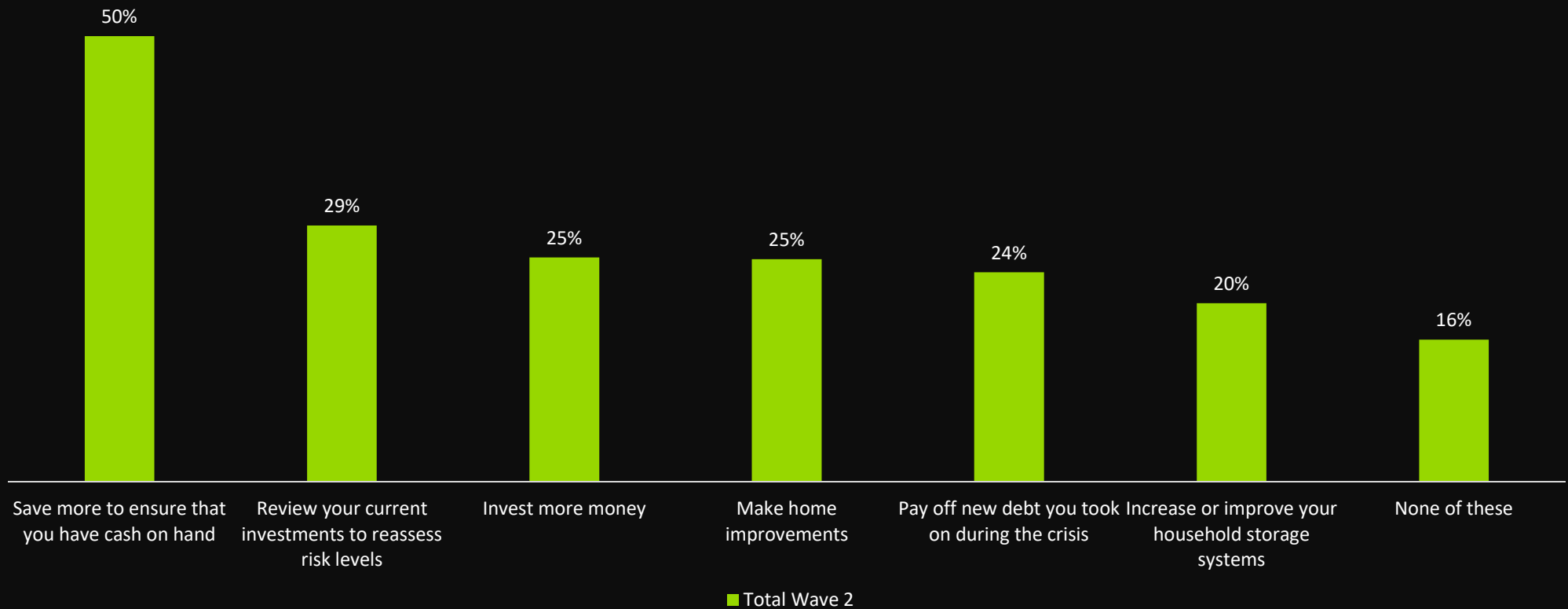
Did this spot make you feel more or less positive about the ...brand?

WAVE 2

HOW CONSUMERS ARE THINKING ABOUT A POST-COVID WORLD

corus.

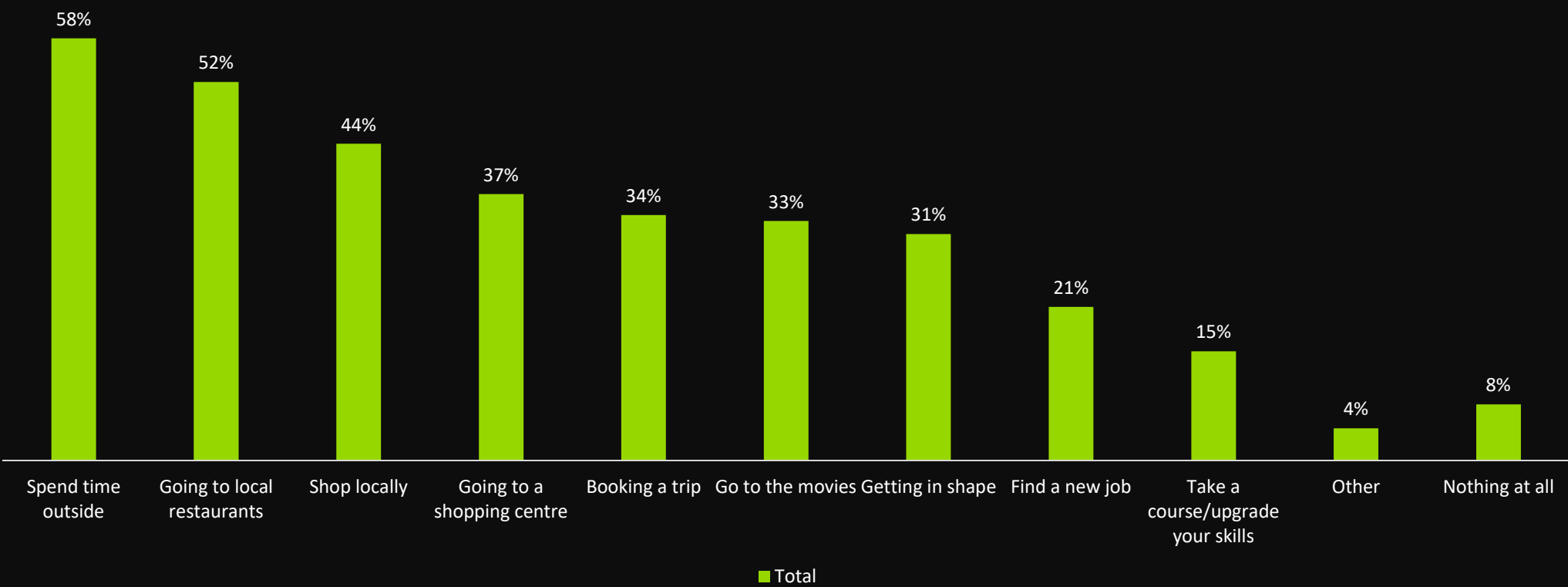
The importance of savings is top of mind



Which of the following if any do you think that you will do once the crisis has passed?

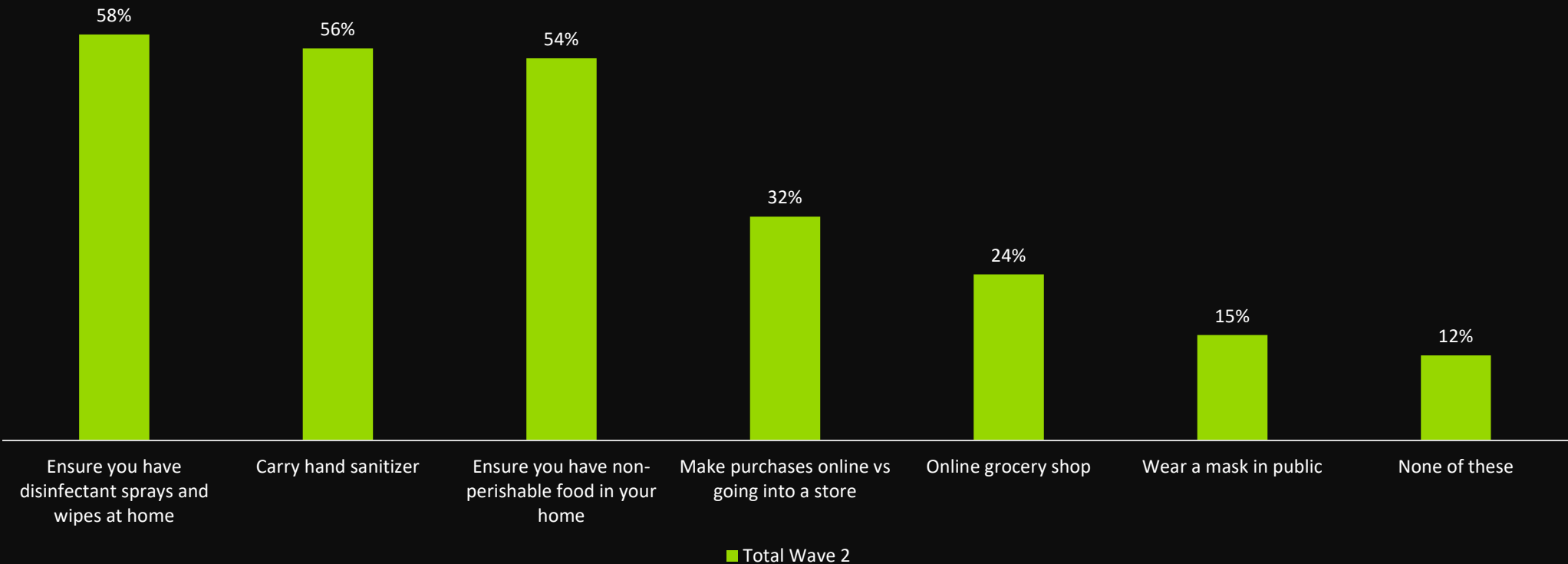
WAVE 2

Canadians are looking forward to getting outside and engaging with their community



Which of the following are on your “post-COVID” to-do list?

Being able to sanitize and well as having food on hand are the top activities that consumers believe will carry over into “normal” life



Once the crisis is over do you think that you will continue to do any of the following?

WAVE 2

Leaning on insights from the Great Recession

- Similar to the recession, this is a challenging time for brands and they are under tremendous pressure to save
- But as the recession did, this crisis will end and there will be brands that emerge stronger & brands that emerge weaker
- History has shown that those who emerge stronger will be the brands who are able to maintain SOV (share of voice) at or above SOM (share of market) during a downturn
- If competitors are cutting budgets the longer-term benefit of maintaining SOV at or above SOM will be even greater.

Canadians are concerned about the COVID-19 crisis.

Uncertainty rules the day as the biggest concerns center around how long the crisis will last and what the impacts will be to both the Global and Canadian economies.

Despite the uncertainty, 45% have started thinking about the purchases that they would need to make once life “returns to normal”. 38% believed that they will be able to benefit from lower interest rates with an additional 29% saying that they were unsure.

Canadians are very open to hearing COVID specific messages from brands. Messages about what a brand is doing to support employees/the community or messages about how they are making it easier for consumers to access their products resonate well.

However, Marketers should not assume that their regular brandsell will not work in this environment. In fact, we saw net positive brand impressions across categories when consumers were exposed to standard brandsell messages.

CORUS.

.....

THANK YOU!

.....

corus.