




RADIO AND COVID19

CONNECTING WITH CANADIANS

March 2020

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The coronavirus pandemic has forced businesses to think and act differently about how they work and how they communicate with employees and customers.

In order for broadcasters and marketers to respond appropriately, it's important to understand how Canadians are feeling.

The following provides highlights from Maru Canada's March 16 to 20th, 2020 report that took a daily look at the evolving feelings, thoughts, perceptions, and behaviors of consumers during the first weeks of isolating during COVID-19 pandemic.







































Canadians want to connect - Radio is how they can connect with their community during this time.

During the week of March 16th Canadians were united in our feelings of concern and worry.

Every province is feeling mostly negative

- While those West of Ontario are somewhat likely to feel Fortunate, the majority of emotion across the country is negative.
- Anxious is a top-three feeling in all provinces except Quebec, where helplessness, isolation, and fear are the most common feelings.
- Canada is generally a very happy country (ninth in the world in the 2019 World Happiness Report), however across the nation fewer than one-in-six feel happy right now (16% in BC is the highest happiness score among all provinces/regions).

HOW DO CANADIAN PROVINCES FEEL? TOP THREE AND BOTTOM THREE FEELINGS, BY PROVINCE

BC feels...		AB feels...		MB/SK feels...		ON feels...		PQ feels...		ATL feels...	
 Anxious	50%	 Anxious	59%	 Anxious	69%	 Anxious	55%	 Helpless	53%	 Anxious	58%
 Fortunate	43%	 Frustrated	52%	 Fortunate	47%	 Frustrated	42%	 Isolated	46%	 Isolated	55%
 Frustrated	42%	 Fortunate	41%	 Afraid	47%	 Isolated	41%	 Afraid	40%	 Frustrated	51%
... and not...		... and not...		... and not...		... and not...		... and not...		... and not...	
 Trusting	7%	 Brave	5%	 Free	1%	 Happy	6%	 Happy	7%	 Free	3%
 Brave	3%	 Excited	2%	 Brave	0%	 Brave	4%	 Brave	5%	 Brave	1%
 Excited	0%	 Free	1%	 Excited	0%	 Excited	3%	 Excited	2%	 Happy	0%
 Positive Feeling		 Negative Feeling									

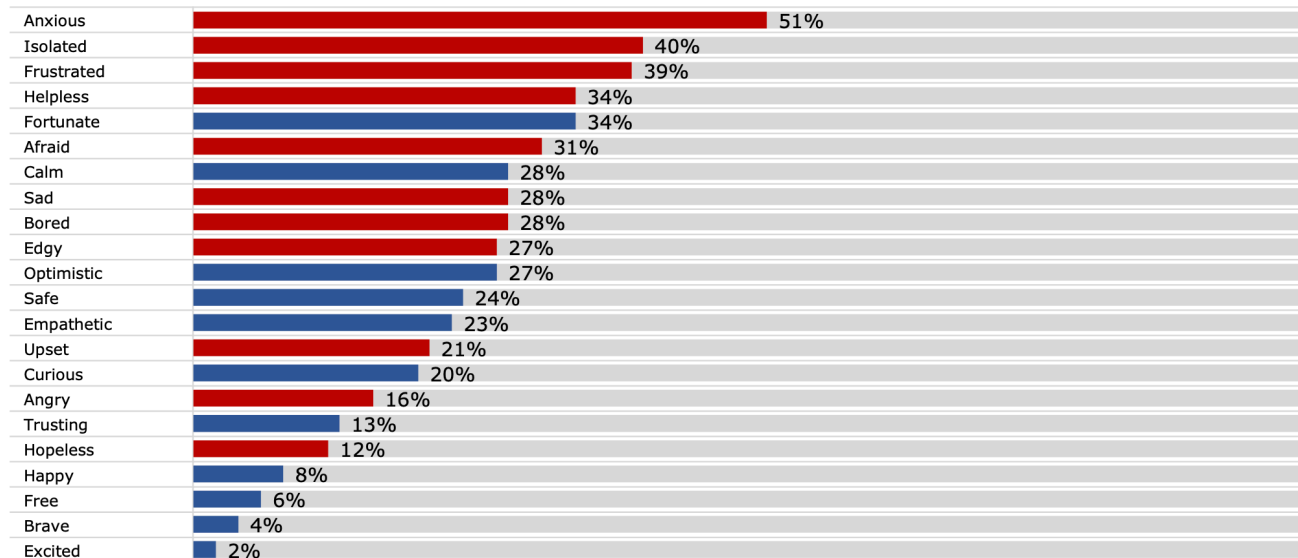
Canadians still felt fortunate.

Canadians are feeling largely anxious, isolated, frustrated, and helpless; but also fortunate

- We tested 11 positive emotions and 11 negative emotions, and the average Canadian is feeling about 1.4 MORE negative emotions than positive.
- Eight of the top ten emotions being felt by Canadians are negative, led by anxious, isolated, frustrated, and helpless.

Positive feelings/ emotions	Negative feelings/ emotions
1.9 / person	3.3 / person
NET -1.4 / person	

HOW DO CANADIANS FEEL?



Not surprising, it's the economy that had Canadians concerned from coast to coast.

Among a wide range of concerns Canadians have, the economy is clearly the biggest worry

- Nine-in-ten Canadians are concerned about the economy, and the economy is the #1 concern among every demographic of Canadians.
- Mental health concerns are prominent for young Canadians; 74% are worried about their family's mental health, and 67% are worried about their own.
- Despite widespread reports of hoarding and empty shelves, 'just' 44% say they are concerned about having enough food to eat; other products seem to be more concerning.

COVID-19 CONCERNS, BY CANADIAN SUBGROUP

	Total	Province/Region						Gender		Age			Income		
		BC	AB	MB/SK	ON	PQ	ATL	Male	Female	18-34	35-54	55+	<\$50K	\$50-99K	\$100K+
BASE: All Respondents	640	93	71	45	250	141	40	343	297	306	240	94	177	231	160
The economy	89%	89%	86%	96%	90%	88%	87%	87%	91%	84%	88%	94%	90%	86%	94%
Maintaining public order in society	69%	74%	69%	86%	70%	66%	50%	67%	71%	73%	63%	71%	74%	61%	67%
My family's physical health	67%	72%	78%	80%	67%	56%	71%	62%	73%	69%	70%	64%	68%	60%	71%
Ability to purchase the products I need	66%	68%	70%	68%	69%	54%	72%	60%	72%	66%	72%	60%	71%	57%	66%
My investments and savings for the future	65%	58%	66%	88%	69%	60%	45%	62%	67%	61%	69%	64%	61%	57%	75%
My family's mental health	65%	70%	76%	71%	65%	52%	78%	59%	71%	74%	65%	58%	66%	63%	60%
Ability of government to function effectively	63%	70%	73%	73%	68%	46%	60%	63%	64%	65%	64%	61%	68%	57%	64%
My day-to-day finances	62%	61%	73%	82%	58%	59%	57%	57%	67%	64%	67%	55%	66%	60%	55%
My physical health	54%	59%	63%	59%	55%	46%	57%	52%	56%	51%	55%	57%	58%	46%	51%
My mental health	54%	54%	61%	54%	55%	49%	55%	45%	62%	67%	60%	38%	57%	51%	45%
My ability to earn a wage	50%	51%	49%	50%	49%	49%	50%	43%	56%	54%	54%	41%	53%	43%	43%
Having enough food to eat	44%	39%	61%	44%	44%	36%	54%	40%	48%	45%	49%	39%	57%	37%	32%
Children's education	44%	43%	52%	65%	41%	38%	47%	41%	47%	43%	47%	41%	41%	45%	48%

COVID-19 Feel, Think, Behave Tracker

C1. In the next question, we will show you a series of statements and will ask you to tell us the extent to which you are concerned about the impact coronavirus (or COVID-19) will have on each, if at all. We will ask you to indicate this by clicking the 'Concerned' or 'Not Concerned' buttons that will appear below the statement.

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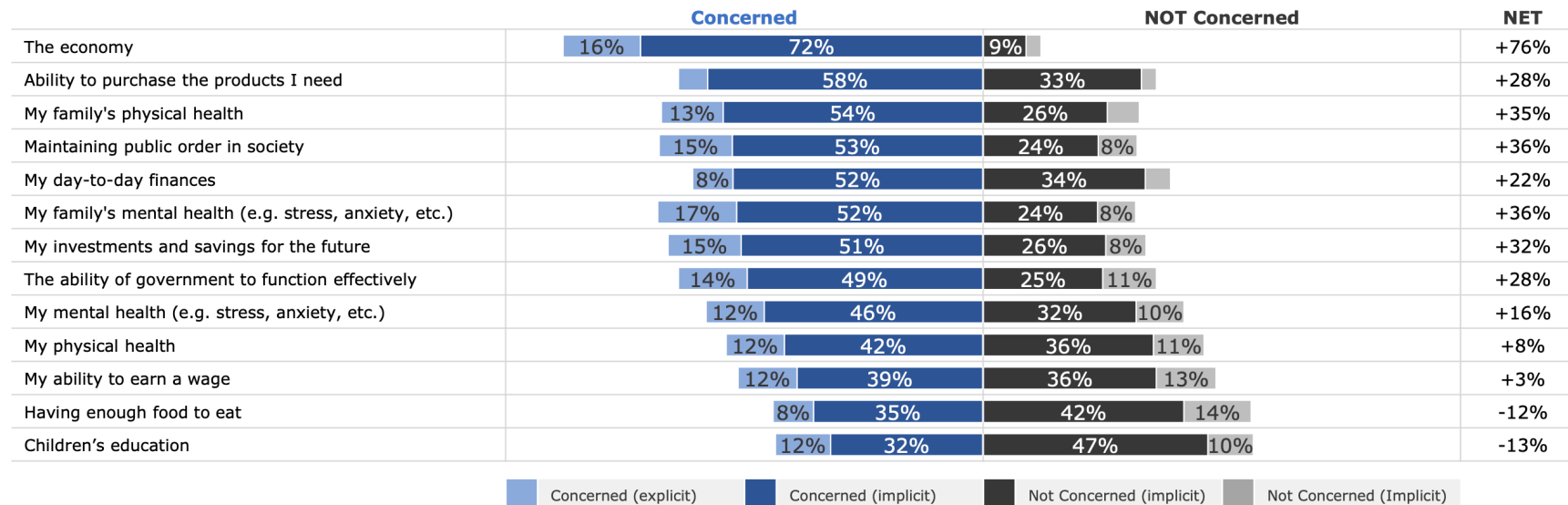
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Ability to purchase the products I need was a leading concern among Canadians in the week of March 16.

Most of Canadians' current concerns are implicit, implying a strong emotional response to COVID-19

When asked what they are and are not concerned about, the vast majority of Canadians answered very quickly, implying their feelings are already very deep-seated and partially emotionally-driven. In particular, *ability to purchase the products I need* had the highest proportion of implicit response (whether concerned or not), with 91% of Canadians having to think very little about their answer.

IMPLICIT ASSOCIATION – CONCERNS DURING COVID-19 PANDEMIC



More than 50% of Canadians said "they don't think life will ever be the same, after the virus".

Canadians feel well-informed; are concerned about the economy and healthcare system

- Canadians are largely taking COVID-19 very seriously, with just 13% saying they believe coronavirus is a hoax or conspiracy; however nearly four-in-ten do feel that society is overreacting to the situation.
- One-half of Canadians say they *don't think life will ever be the same, after the virus*; an incredible metric showing that many believe this is a world-altering event.

CANADIAN FEELINGS AND BELIEFS ABOUT COVID-19 (TOP-2 BOX AGREEMENT)

We can all (or MOSTLY) agree...		Canadians are divided on...		Most of us DO NOT agree...	
I worry that coronavirus/COVID-19 will impact the economy for a long time	92%	I do not believe there are enough tests to get an accurate picture of the cases in Canada	74%	Society is overreacting to coronavirus/COVID-19	39%
I feel well-informed about how to keep myself protected from COVID-19	91%	Where I live, things are going to get worse before they get better	72%	I really miss watching sports	38%
I am concerned about the healthcare system's ability to handle this situation	87%	The Canadian government is doing a good job protecting citizens	68%	I am afraid to see my doctor because I might contract coronavirus/COVID-19	37%
I don't feel safe in large crowds	80%	I am concerned about personally contracting coronavirus/COVID-19	59%	I don't feel safe going outside	31%
My province's government is doing a good job protecting citizens	80%	I am concerned there is not enough trustworthy information out there	57%	I believe that coronavirus/COVID-19 is a hoax and/or conspiracy	13%
I feel safe going shopping, so long as it is not too crowded	76%	I believe there will be a coronavirus/COVID-19 vaccine widely available in 2020	54%		
		COVID-19 is just a temporary problem. Life will get back to normal soon	53%		
		I am worried about paying my bills (incl. rent or mortgage) if this keeps up much longer	52%		
		I don't think life will ever be the same, after the virus	51%		

Men and Women have different feelings.

The biggest gender differences are that men miss sports, and women are worried about paying the bills

- Though not majority opinions, men are much more likely than women to say they miss sports, but also to feel that COVID-19 is just a temporary problem and that society is overreacting.
- Women seem to be taking isolation orders somewhat more seriously, mentioning they are afraid to see their doctor, they don't feel safe in large crowds, and even that they don't feel safe outdoors in proportionally higher numbers than men.

DIFFERENT FEELINGS AND BELIEFS BY GENDER

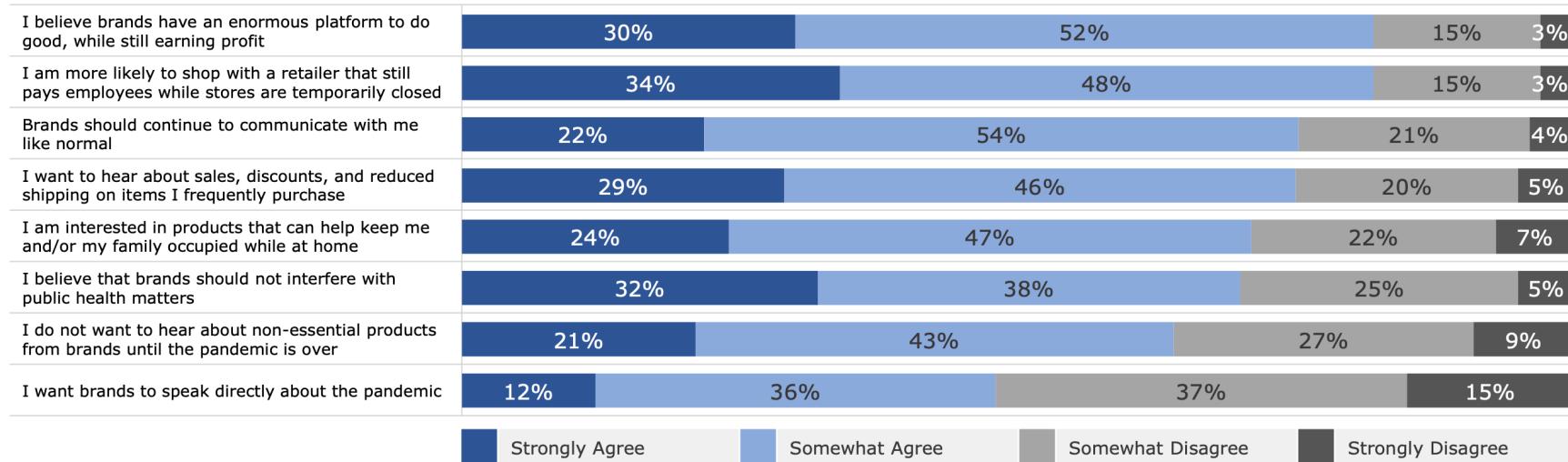
Men are MORE likely to say...		Men and Women evenly agree...		Women are MORE likely to say...	
I really miss watching sports	+20% (M vs. W)	My province's government is doing a good job protecting citizens	+3% (M vs. W)	I am worried about paying my bills (incl. rent or mortgage) if this keeps up much longer	+20% (W vs. M)
I feel safe going shopping, so long as it is not too crowded	+10%	I am concerned there is not enough trustworthy information out there	+3%	I am afraid to see my doctor because I might contract coronavirus/COVID-19	+15%
COVID-19 is just a temporary problem. Life will get back to normal soon	+9%	I feel well-informed about how to keep myself protected from COVID-19	0%	The Canadian government is doing a good job protecting citizens	+13%
Society is overreacting to coronavirus/COVID-19	+8%	I believe that coronavirus/COVID-19 is a hoax and/or conspiracy	0%	I don't think life will ever be the same, after the virus	+11%
		I am concerned about personally contracting coronavirus/COVID-19	-1%	Where I live, things are going to get worse before they get better	+11%
		I believe there will be a coronavirus/ COVID-19 vaccine widely available in 2020	-2%	I don't feel safe in large crowds	+9%
		I worry that coronavirus/COVID-19 will impact the economy for a long time	-4%	I don't feel safe going outside	+8%
		I am concerned about the healthcare system's ability to handle this situation	-4%	I do not believe there are enough tests to get an accurate picture of the cases in Canada	+5%

Most Canadians wanted to hear from brands, but in a meaningful way.

Most consumers want to keep hearing from the brands they do business with

There is no one perfect communications plan that will appease all Canadians. HOWEVER, while there are some Canadians who would prefer not to receive brand communications, by and large Canadians seem to want brands to continue to communicate with them during COVID-19, but perhaps in a more careful and specific way. 76% say *brands should continue to communicate with me like normal*, however just 48% agree they *want brands to speak directly about the pandemic* (and just 12% who strongly agree).

FEELINGS ABOUT BRAND RESPONSIBILITY AND COMMUNICATIONS DURING COVID-19 (RANKED BY TOP-2 BOX AGREEMENT)



COVID-19 Feel, Think, Behave Tracker

C13. We are curious to know what you expect from your favorite brands and retailers, while social distancing is in place across the country. Let us know the type of information that you this is appropriate to come from brands today:

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How do brands connect with Canadians during these extraordinary times?

“This moment in time for media is unprecedented. If we look at history, we know we lean more into our communities, our local broadcast and radio than ever before to truly understand what is happening in our community. This crisis will make people take notice of the media that matters in their lives and the media they can trust.”

— Sarah Thompson, CSO Mindshare Canada

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1. Continue to advertise: According to WARC/Millward Brown, it can take up to 5 years for brands to recover from “going dark”:
 - *76% of Canadians want brands to continue to communicate with them throughout COVID-19 (Maru Canada)*
 2. Place a greater emphasis on emotional campaigns to build your brand more strongly (*Millward Brown/Binet & Field*):
 - *82% of Canadians believe brands have an enormous platform to do good, while still earning a profit. (Maru Canada)*
 3. Brand building is typically long term but can be adapted to demonstrate how brands are working for Canadians now:
 - *75% of Canadians want to hear about sales, discounts, and reduced shipping on items I frequently purchase. (Maru Canada)*


Sources:

Marketing During a Recession: To Spend or Not to Spend Millward Brown 2008

Effectiveness in Context: A Manual for Brand Building. Binet & Field, Oct 2017

Pierre Bouvard 7 Strategies For An Uncertain Economy

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Canadians are feeling anxious: Radio voices are familiar and comforting.

Marketers need to be sensitive to consumer's moods and needs: Radio has the agility and flexibility to adapt messaging.

Canadians want timely information: Radio brings Canadian up-to-the-minute local news and information from credible and trusted sources.

Most Canadians want to hear from brands: Radio is always on and flexible, empowering advertisers to broadcast meaningful messages quickly, efficiently and affordably.