

Is Everyone Still Doing Meetings in Bunny Slippers?

An update on where Canada is working
now

July 2020



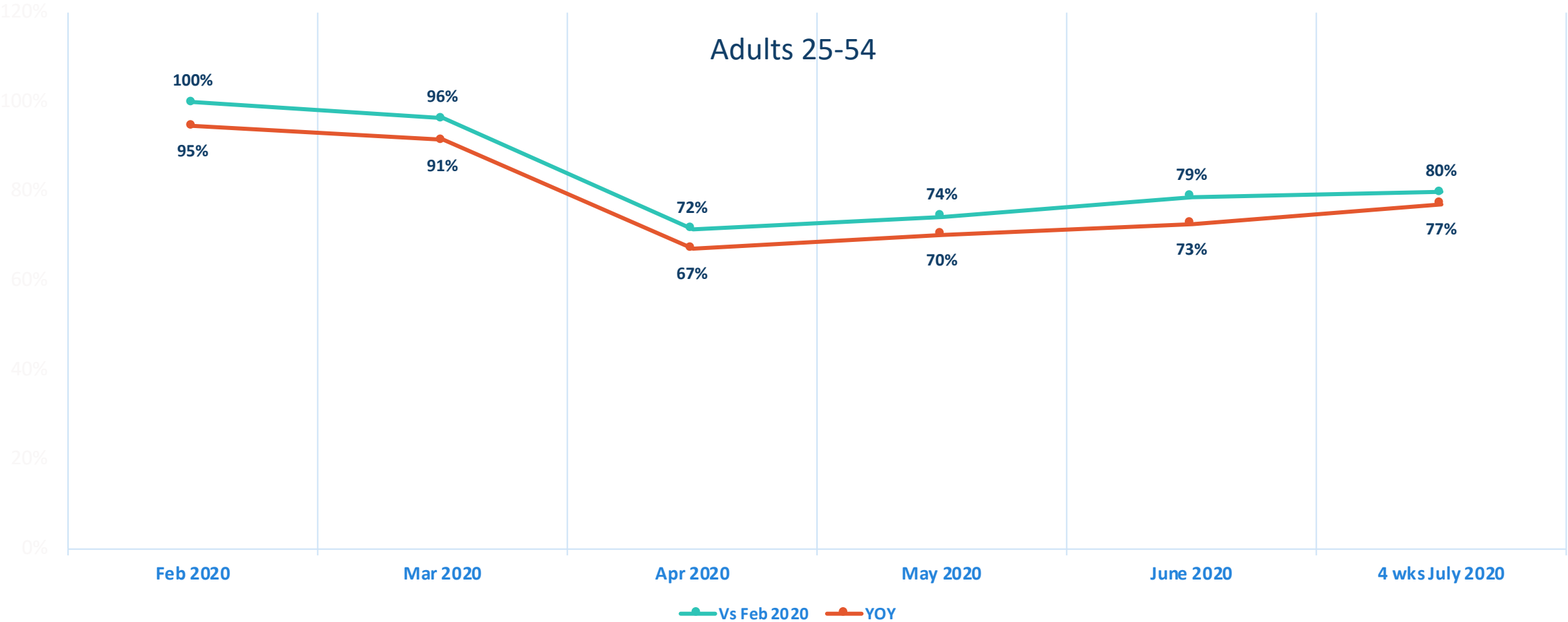
Radio is well-positioned to reach those ready to spend as Canada re-opens

Based on findings from an online survey among 1,515 Canadians aged 18+ from Maru Voice Canada July 7, 2020

- It isn't just the temperature that's been rising lately, so too has Canadian spending. On a year-over-year basis, weekly spending growth entered positive territory for the first time since the start of the pandemic, in the week ending July 10th. (Source: TD Bank Economic Outlook-July 21, 2020)
- Many Canadians have seen their employment situation change due to COVID-19, but the percentage of Canadians working outside the home is on the rise, and OOH tuning to AM/FM Radio is growing in pace.
- Heavy radio listeners are more likely to be working outside the home than the average Canadian and are more likely to be ready for spending on Stage 3 re-opening activities.
- Those Canadians not yet ready to 'get back to the office', will be looking for ways to make their @home work space comfortable.

WITH CONTINUED OPENINGS, WORKERS RETURNING TO JOBS, AND TRAFFIC BUILDING ON THE ROADS, AM/FM TUNING IS GROWING

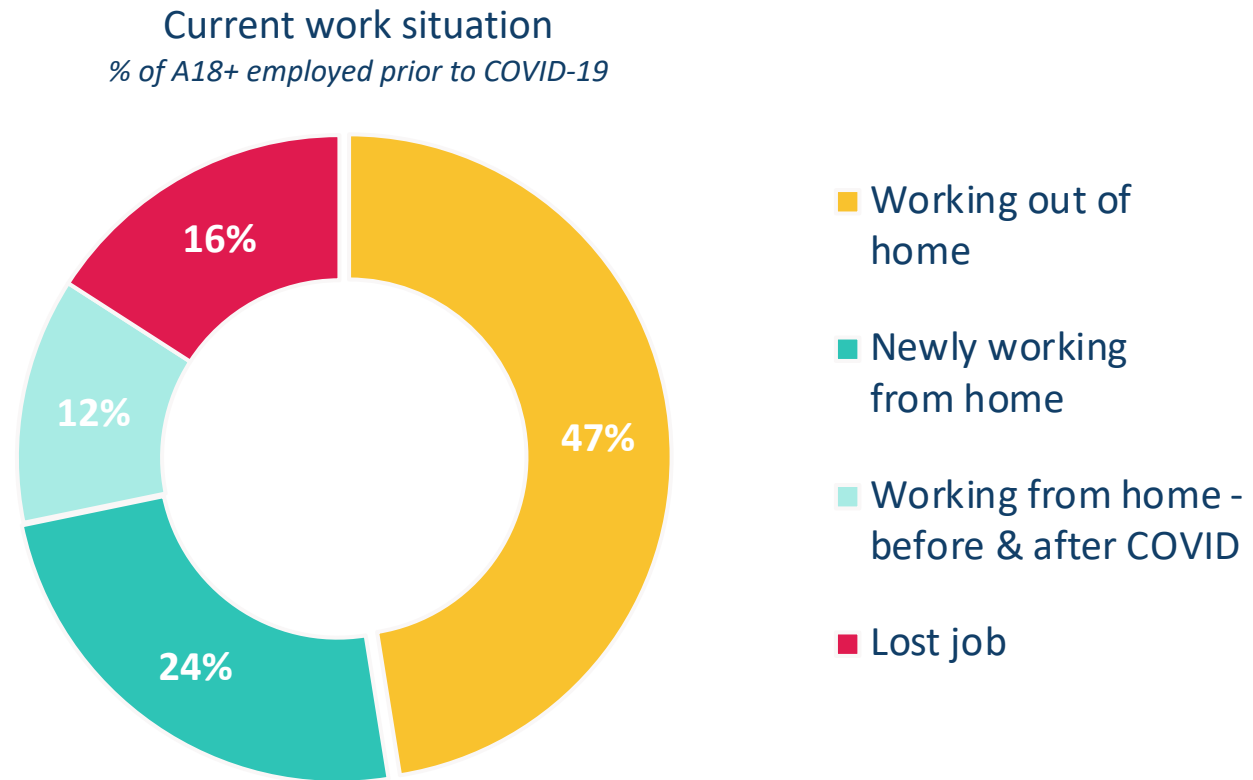
AM/FM is continuing its steady climb to PRE-COVID tuning levels, and those who are listening are ready to spend.



SOURCE: PPM NUMERIS, Total Radio, AW, Non-Currency Total Canada, AMA, A25-54

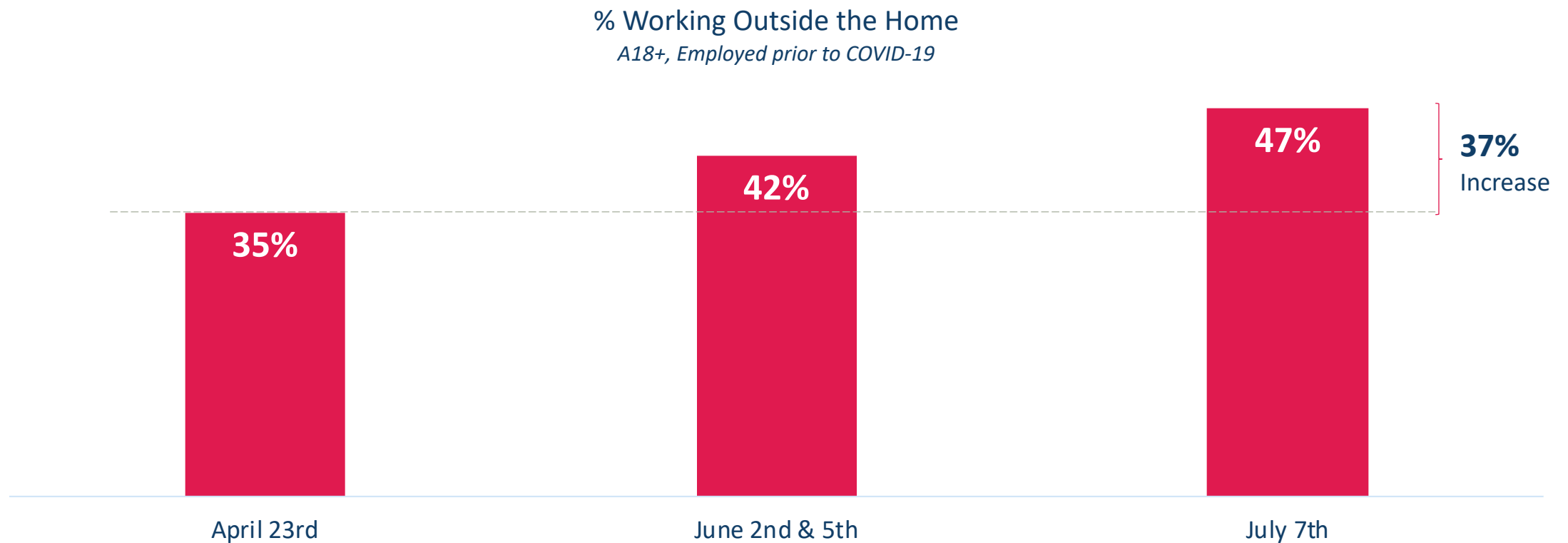
NEARLY HALF OF THE CANADIAN WORKFORCE IS CURRENTLY WORKING OUTSIDE THE HOME

Looking across the country, nearly twice as many Canadians are now working away from home vs. those newly working @home.



THE OUT-OF-HOME WORKFORCE IS STEADILY INCREASING

As Canada continues to emerge from the pandemic, the proportion of working adults who are now working away from home has increased by 37% since late April.



SOURCE: Maru Voice Canada, July, 2020

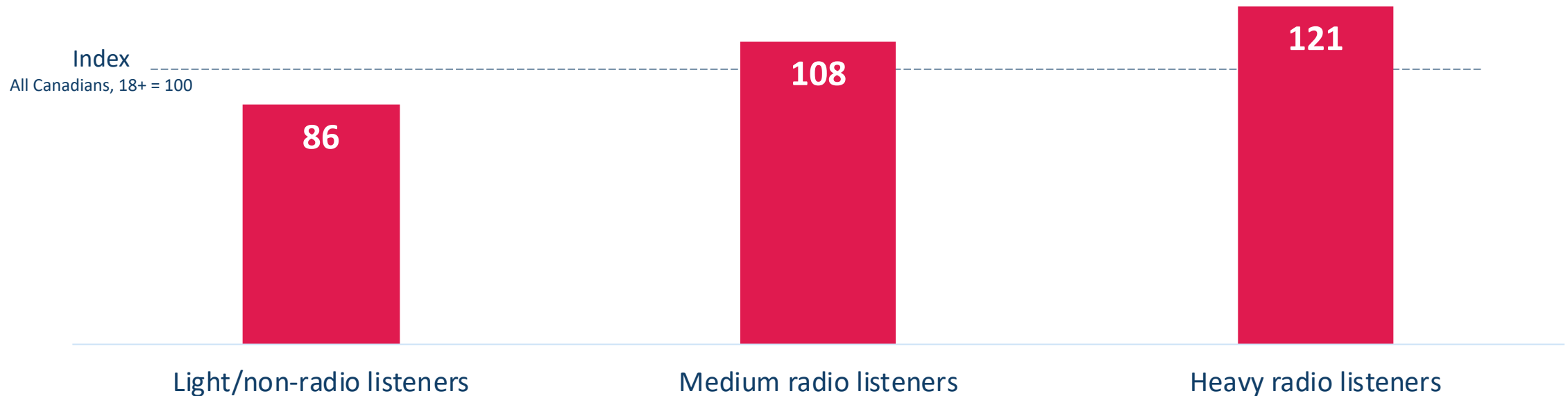
WS1b. The ways that Canadians work, shop, and socialize have changed dramatically in the past few months in an effort to stop the spread of coronavirus/COVID-19, Workplace situation

Base: Canadians 18+ employed prior to COVID-19 July 7 (n=894)

RADIO REACHES THE OUT-OF-HOME WORKER

Canadians working out of the home are out and about, and more likely to be heavy listeners to AM/FM Radio.

Working Outside the Home
Listening Levels, Indexed Against 18+ Canadians

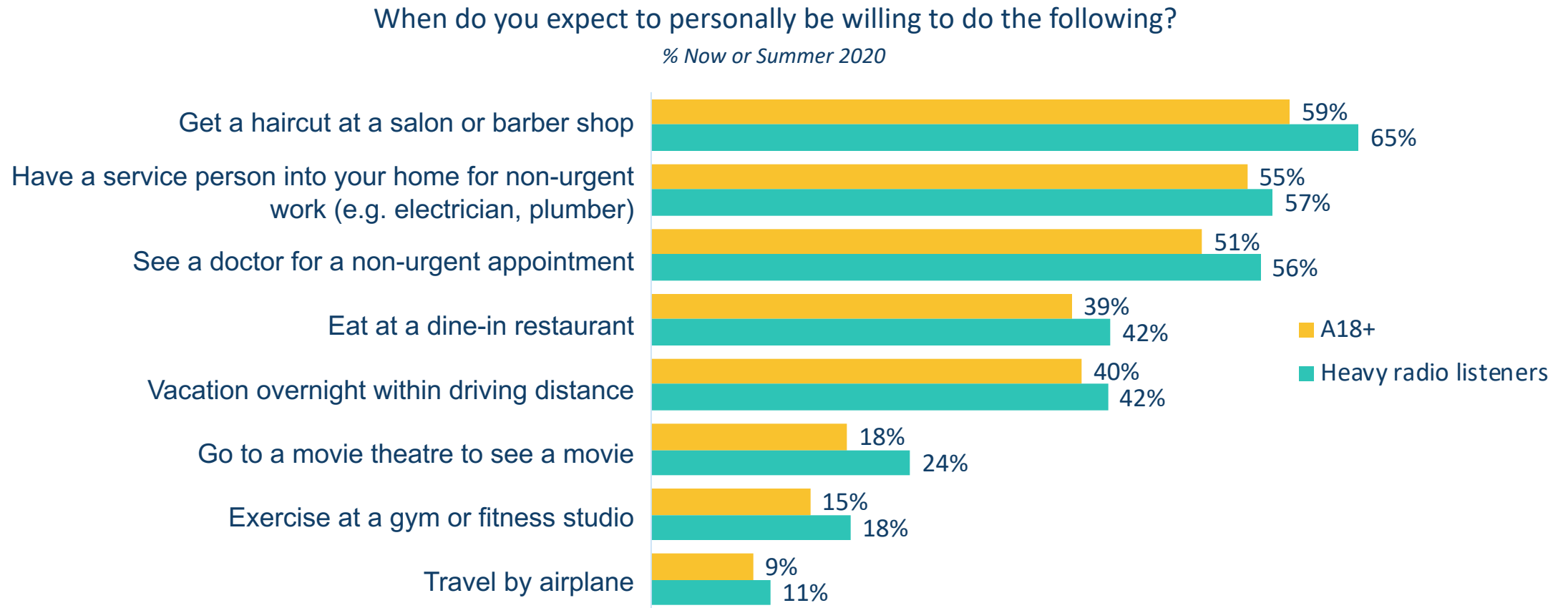


SOURCE: Maru Voice Canada, July 2020

WS1b. The ways that Canadians work, shop, and socialize have changed dramatically in the past few months in an effort to stop the spread of coronavirus/COVID-19; Workplace situation
Base: Canadians 18+ (n=1,514); light/non-radio listeners (n=717); medium radio listeners (n=500); heavy radio listeners (n=297)

WITH MANY WORKING OUT-OF-HOME, HEAVY RADIO LISTENERS ARE ALSO FIRST IN LINE FOR SPENDING ON STAGE 3 ACTIVITIES

Heavy radio listeners are more likely than the average Canadian to be ready to see a movie, exercise at a gym, dine-in at a restaurant and travel by air over the next couple of months.



SOURCE: Maru Voice Canada, July 2020

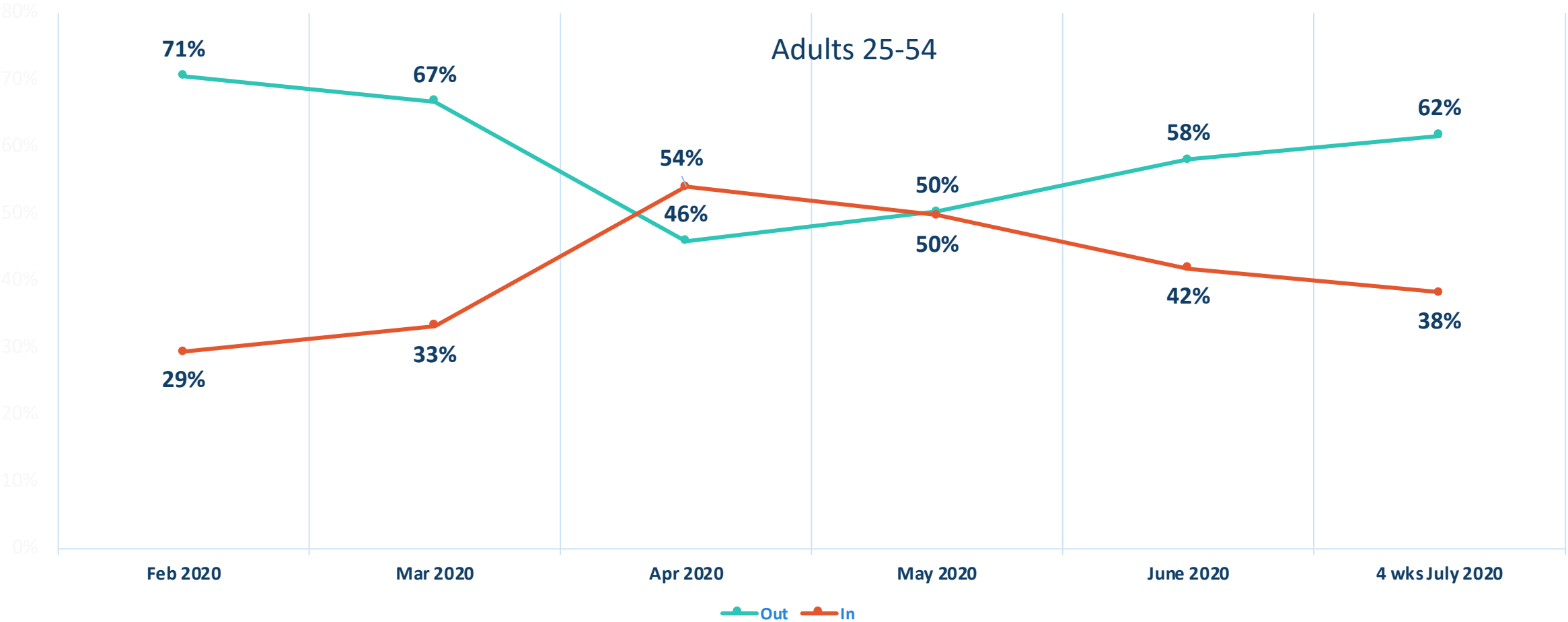
C53. Assuming the COVID-19 pandemic and response unfolds as you expect, when do you expect to personally be willing to do the following:

Base: Canadians 18+ (n=1,514), Heavy Radio Listeners (n=297)

Employers and new @home workers are looking for balance.

- Most Canadians working from home due to the pandemic are enjoying it and see it as a net positive for productivity and business culture.
- However, new @home workers do miss aspects of working outside the home, and few would choose to work from home *exclusively* after the pandemic.
- Most new @home workers say their employers have started talking about bringing them back to the workplace, many in the next few months.
- As Canadians return to ‘normal’ working locations, AM/FM Radio is along for the ride.

SHARE OF OUT OF HOME TUNING IS RETURNING TO PRE-SHUT DOWN LEVELS.



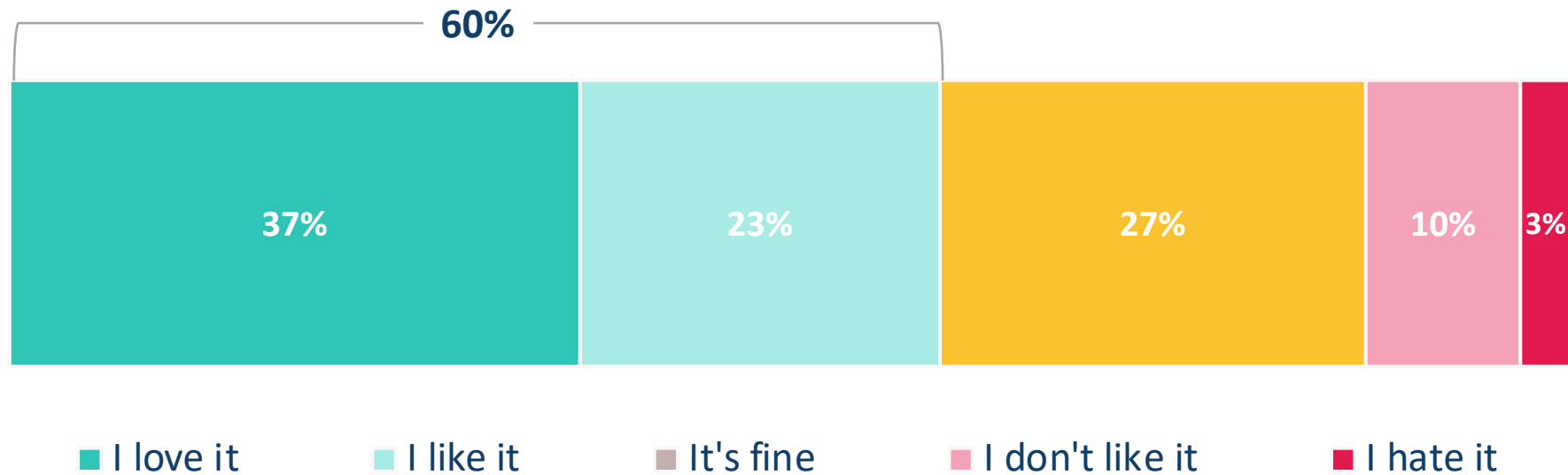
SOURCE: PPM NUMERIS, Total Radio, AW, Non-Currency Total Canada, AMA, A25-54

WORKING FROM HOME A POSITIVE FOR MOST

Working from home isn't a slam-dunk for everyone, but 6-in-10 employees who find themselves newly working from home feel good about their new situation.

What is your overall feeling about working from home?

% of New at-home workers, 18+



SOURCE: Maru Voice Canada, July 2020

WS2. Aside from the health benefits during COVID-19, what is your overall feeling about working from home?

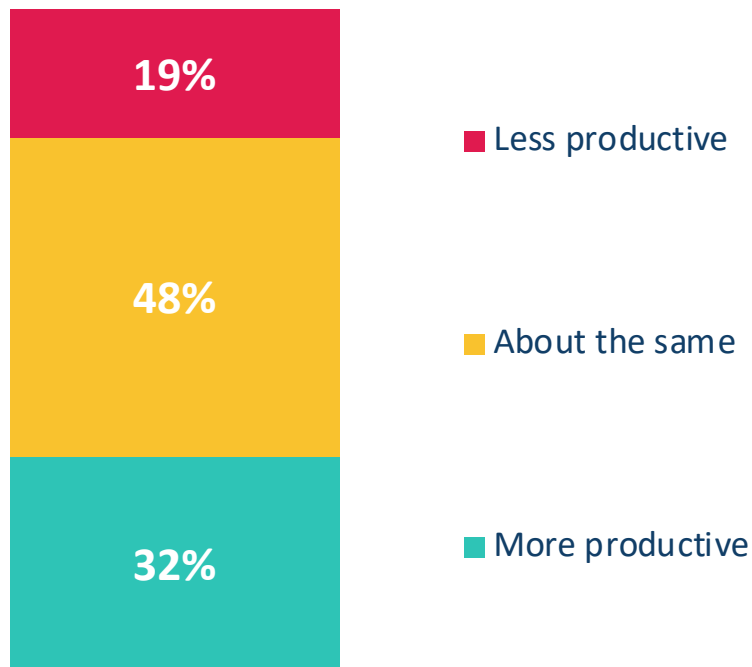
Base: Canadians 18+ , working from home due to COVID-19 (n=226)

NEW @HOME WORKERS SEE BENEFITS IN BOTH PRODUCTIVITY AND CULTURE

One-in-five new at-home workers are feeling less productive in their new environment, but overall the switch to working from home is seen as a net positive for both productivity and workplace culture.

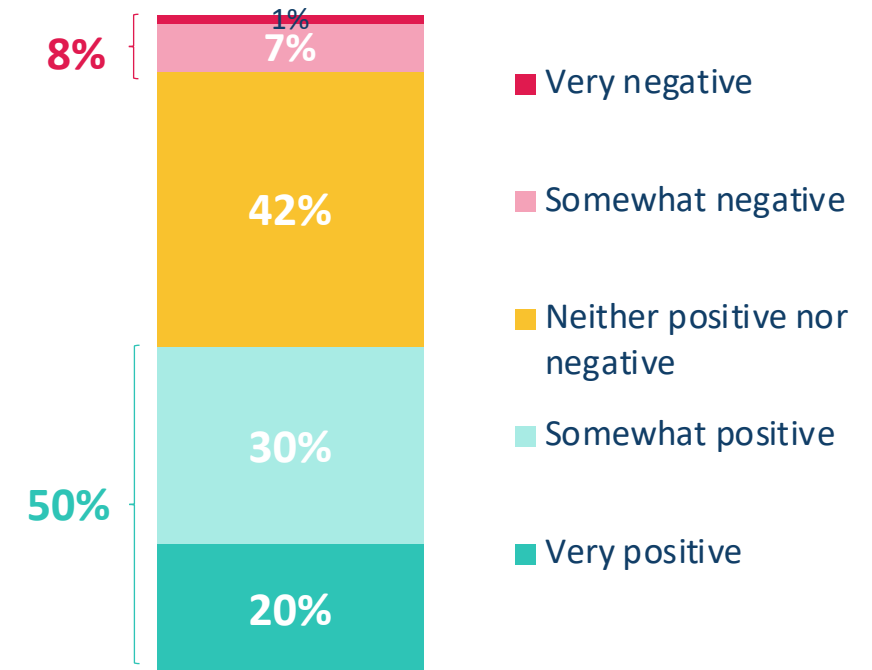
How productive are you when working from home?

% of New at-home workers, 18+



Impact on your firm/organization's culture

% of New at-home workers, 18+



SOURCE: Maru Voice Canada, July 2020

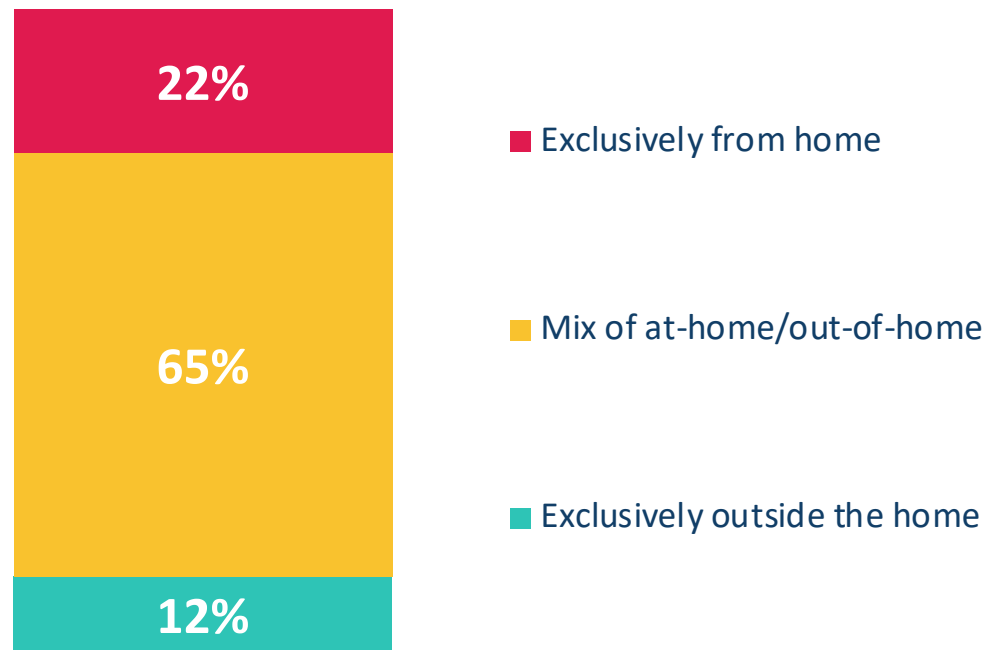
WS3. How productive are you when working from home? / WS7. Thinking of the impact on your firm/organization's culture, do you think that having more people working from home has had a positive or negative impact on your firm/organization's culture? Base: Canadians 18+ , working from home due to COVID-19 (n=226)

VERY FEW NEW @HOME WORKERS WOULD FOREGO THE OFFICE ENVIRONMENT ENTIRELY

Despite the benefits, only 22% of new @home workers would want to work *exclusively* from a home office once the pandemic is behind us. Meanwhile, 12% say they don't want to work from home at all.

Once the COVID-19 pandemic is completely behind us, how would you want to work?

% of New at-home workers, 18+



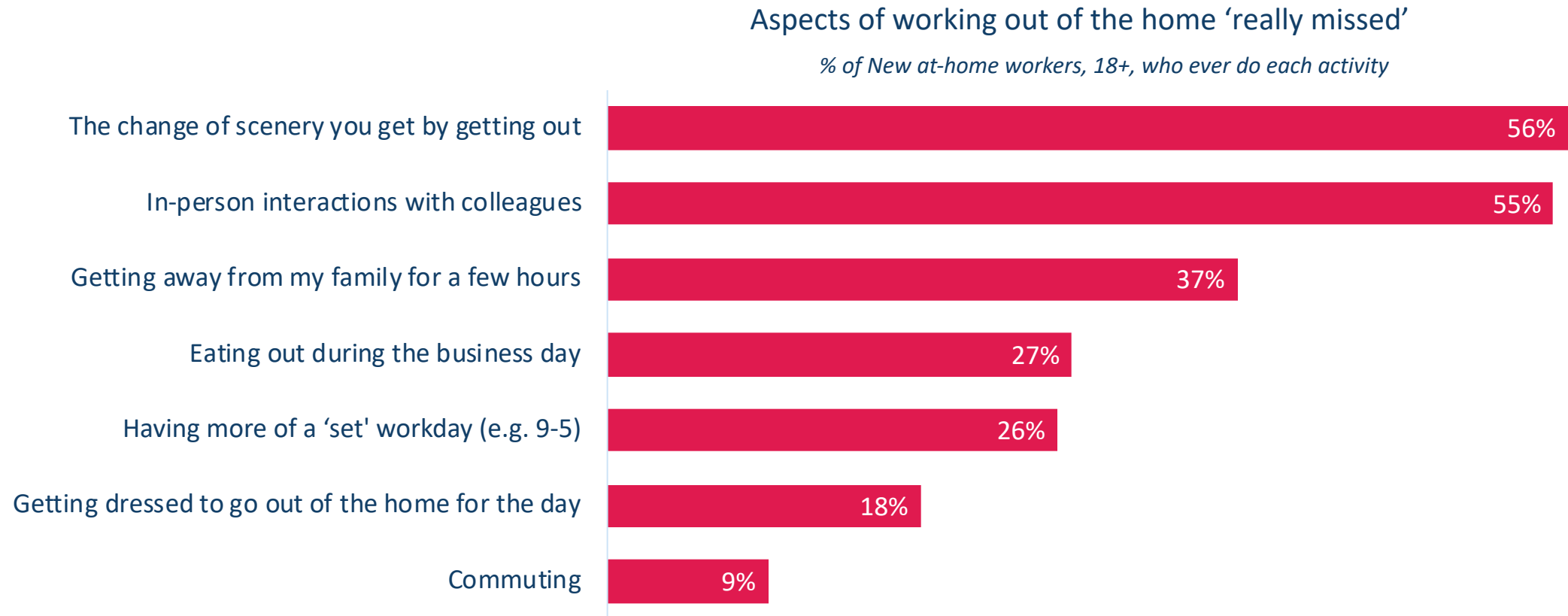
SOURCE: Maru Voice Canada, July, 2020

WS4b. If it were up to you, once the COVID-19 pandemic is completely behind us, how would you want to work?

Base: Canadians 18+ , working from home due to COVID-19 (n=226)

NEW @HOME WORKERS MISS MANY ASPECTS OF THEIR PRE-COVID WORKPLACE

Working from home has many Canadians missing elements of their old working situation—especially, the change of scenery that comes with getting out of the house, and the chance to interact with their co-workers in person.



SOURCE: Maru Voice Canada, July 2020

WS6. Are there any elements of working outside of the home that you miss, or that you are happy to be avoiding now that you are primarily working from home?

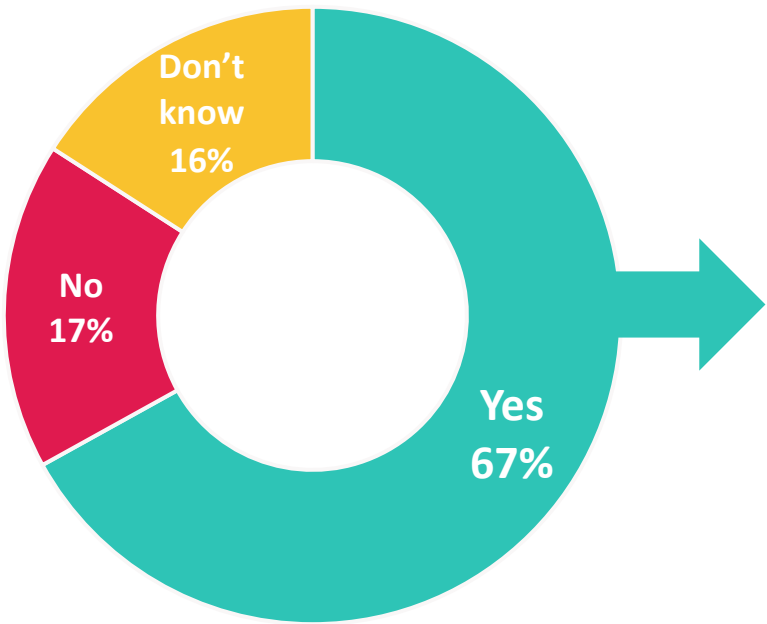
Base: Canadians 18+ , working from home due to COVID-19 (n=226)

TWO-THIRDS OF NEW @HOME WORKERS SAY THEIR EMPLOYERS ARE DISCUSSING A RETURN TO THE WORKPLACE

Discussions for a return to the workplace are in motion for most new @home workers. More than half of these employers plan to bring everyone back into the workplace.

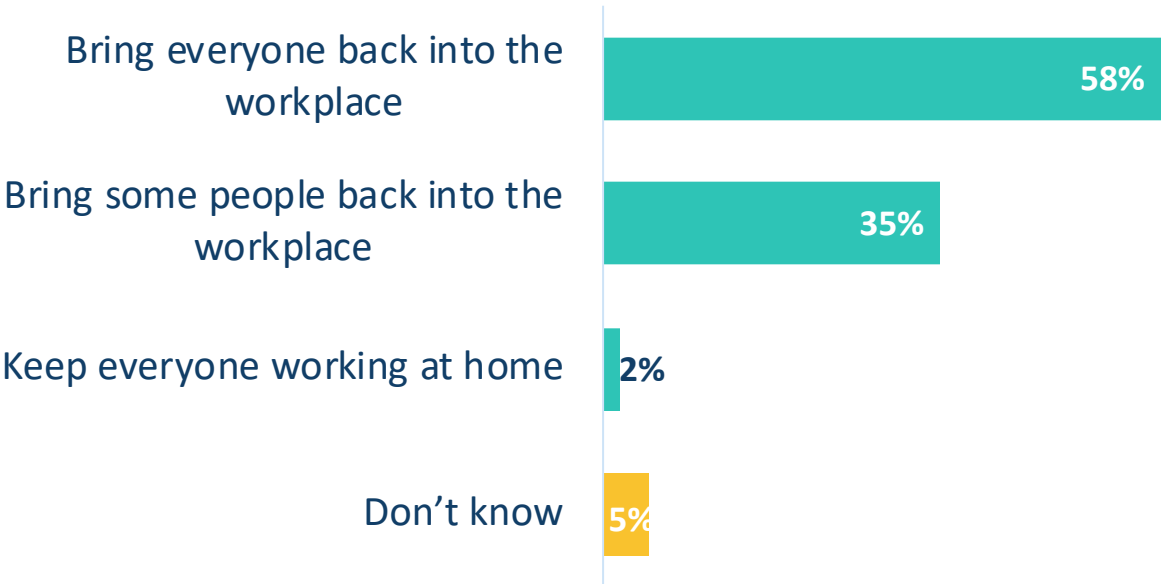
Is your employer discussing a return to the workplace?

% of New at-home workers, 18+



Which of the following does it look like your firm or organization is planning to do?

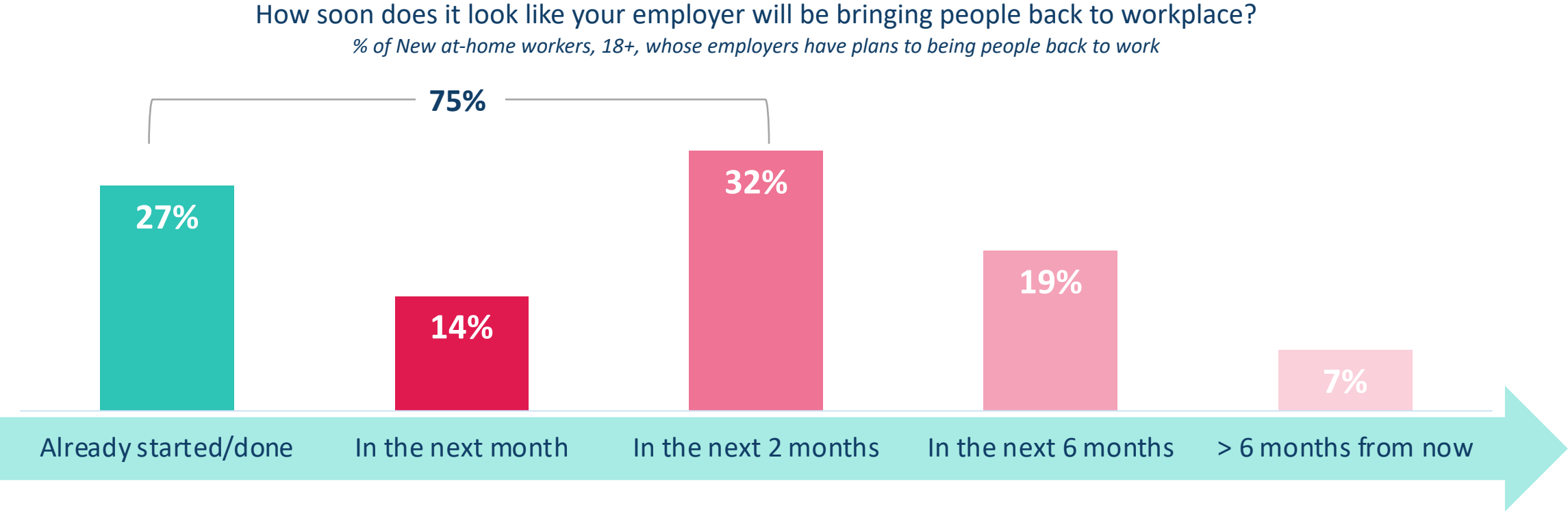
% of those whose employers are discussing a return to the workplace



SOURCE: Maru Voice Canada, July 2020
WS9. As far as you know, has the firm or organization you work for started having discussions about whether and how they will bring people back to workplaces?
Base: Canadians 18+ , working from home due to COVID-19 (n=232), whose employers are discussing a return to the workplace (n=158)

THREE-IN-FOUR EMPLOYERS LOOKING TO BRING PEOPLE BACK TO WORK PLAN TO GET STARTED IN THE NEXT COUPLE OF MONTHS

Most of the other return-to-work plans are being sketched out to start sometime in the next six months.



SOURCE: Maru Voice Canada, July, 2020
WS11. How soon does it look like your employer will [INSERT ANSWER FROM WS10]?
Base: Canadians 18+ , working from home due to COVID-19, aware of employer’s plan for a return to the workplace (n=147)

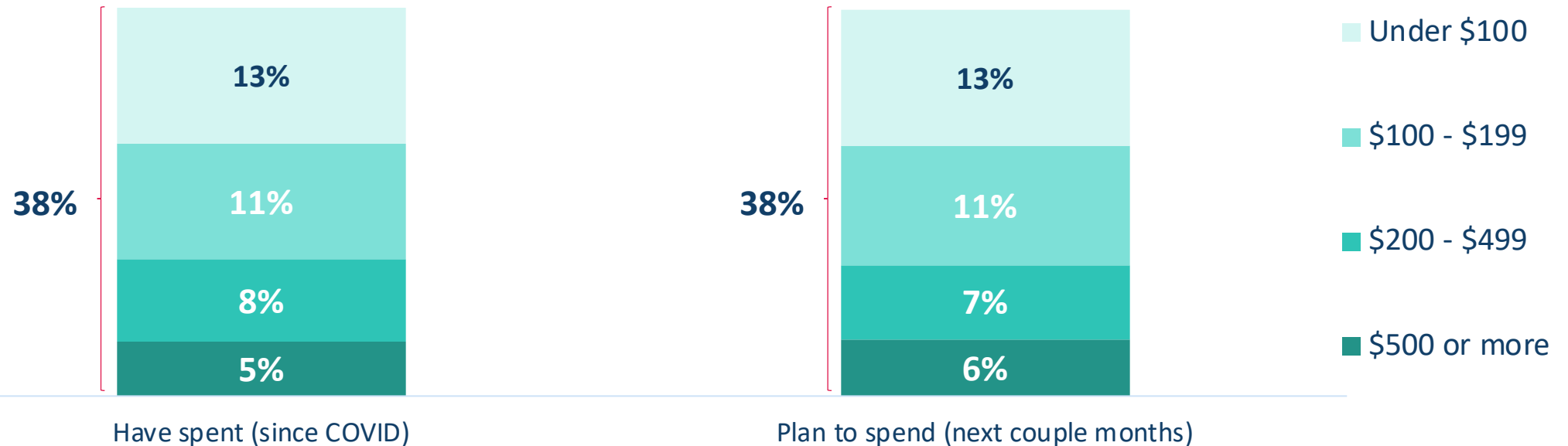
**@Home Workers are
looking to upgrade
their workplace, and
AM/FM Radio is
reaching them.**

- Sitting at the kitchen table or on the couch with a laptop is no longer cutting it—many Canadians are looking to improve their @home workspaces.
- While many are returning to work, those continuing to work from home expect to spend money on upgrading their workspace over the coming months, and AM/FM is reaching them.
- Interest in spending on their home office is particularly high among the 56% of @home workers who listen to AM/FM Radio while they're working.

CANADIANS WORKING FROM HOME ARE SPENDING TO UPGRADE THEIR SPACE

Workspace upgrades are on the mind of many Canadians who are working from home. More than a third say they have already spent and/or plan to spend on upgrading their home office over the next couple months.

Spending on furniture/equipment/décor etc. for @home work space
% of A18+ Working from home



SOURCE: Maru Voice Canada, July 2020

WS5b. How much, if anything, have you spent, and how much do you plan to spend on office furniture, equipment, décor, or other items for your home work space?

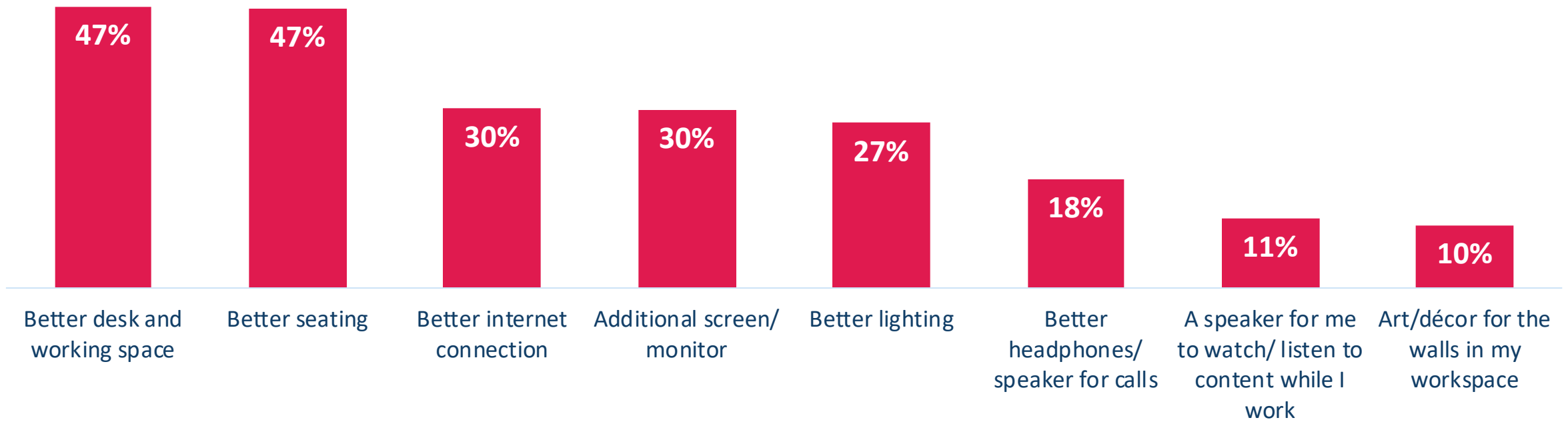
Base: Canadians 18+ working from home at least some of the time (n=460)

ERGONOMIC UPGRADES TOP THE HOME OFFICE WISHLIST

Desk space and seating are the top two priorities for Canadians working from home. While not as high on the list, improving their sound system is a priority for more than one-in-ten.

Thinking about your current working space when you work from home, which of the following are priorities for you to improve?

% of A18+ Working from home



SOURCE: Maru Voice Canada, July 2020

WS5. Thinking about your current working space when you work from home, which of the following are priorities for you to improve?

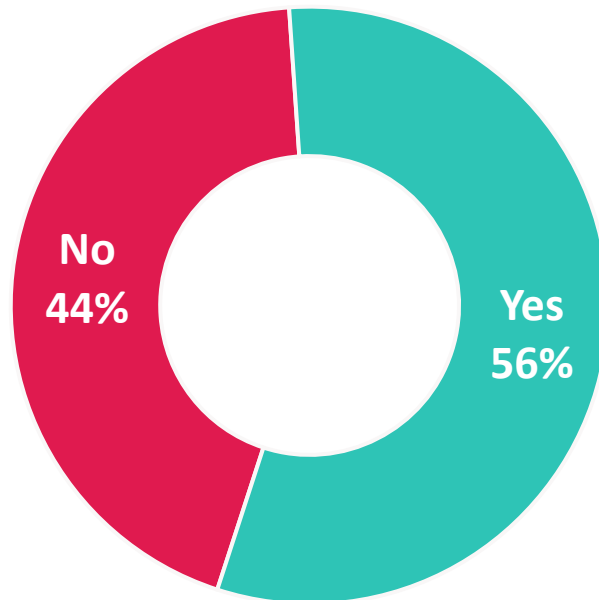
Base: Canadians 18+ , working from home at least some of the time (n=460)

CANADIANS LISTENING TO AM/FM RADIO WHILE WORKING @HOME ARE MORE LIKELY TO SPEND ON OFFICE UPGRADES

More than half of @home workers say they listen to at least some AM/FM Radio while they work during a typical workday. These listeners are nearly 2X more likely than non-listeners to say they plan to spend on upgrading their home office.

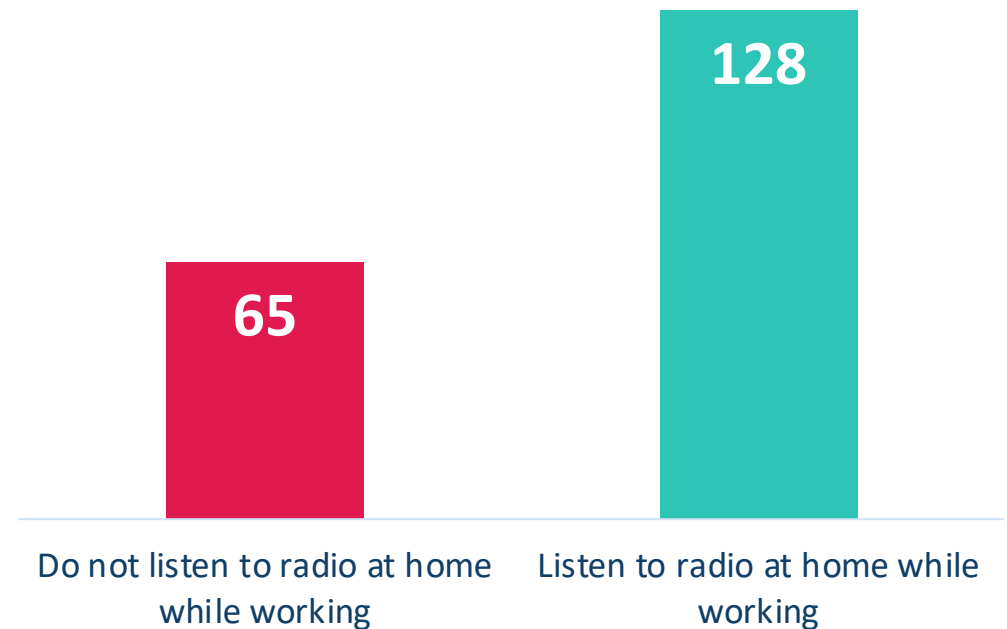
Listen to AM/FM while working from home

% of A18+ Working from home



Plan to spend in next couple months on home office

Index to total A18+ working from home



SOURCE: Maru Voice Canada, July 2020

WS5b. How much, if anything, have you spent, and how much do you plan to spend on office furniture, equipment, décor, or other items for your home work space?

Base: Canadians 18+ working from home at least some of the time (n=460), listen to radio at home while working (n=262), don't listen (n=198)

**On the path to
recovery, AM/FM
Radio continues to
connect with
consumers.**

- Canadian consumers are emerging from nationwide lockdowns with pent up demand and they are keen to spend.
- With more people out and about, AM/FM Radio continues to build toward seasonal norms providing advertisers the ability to reach those consumers who are ready to spend.
- Canadians continuing to work @home are listening while they work and are willing to spend money to improve their @home working environment.