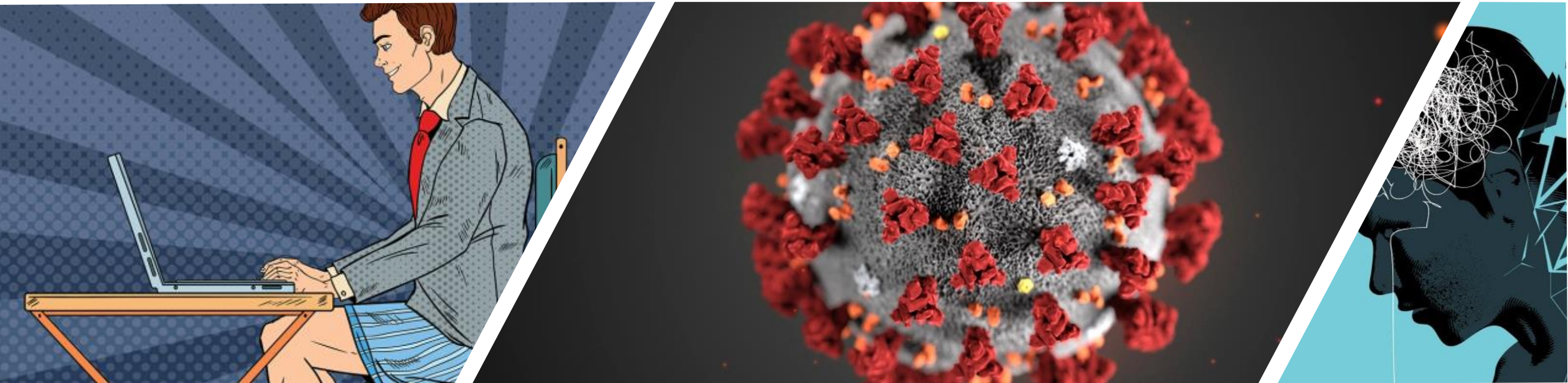


maru/ REPORTS



COVID-19 Feel, Think, Behave Tracker

A daily look at the evolving feelings, thoughts, perceptions, and behaviors of consumers during the COVID-19 pandemic.

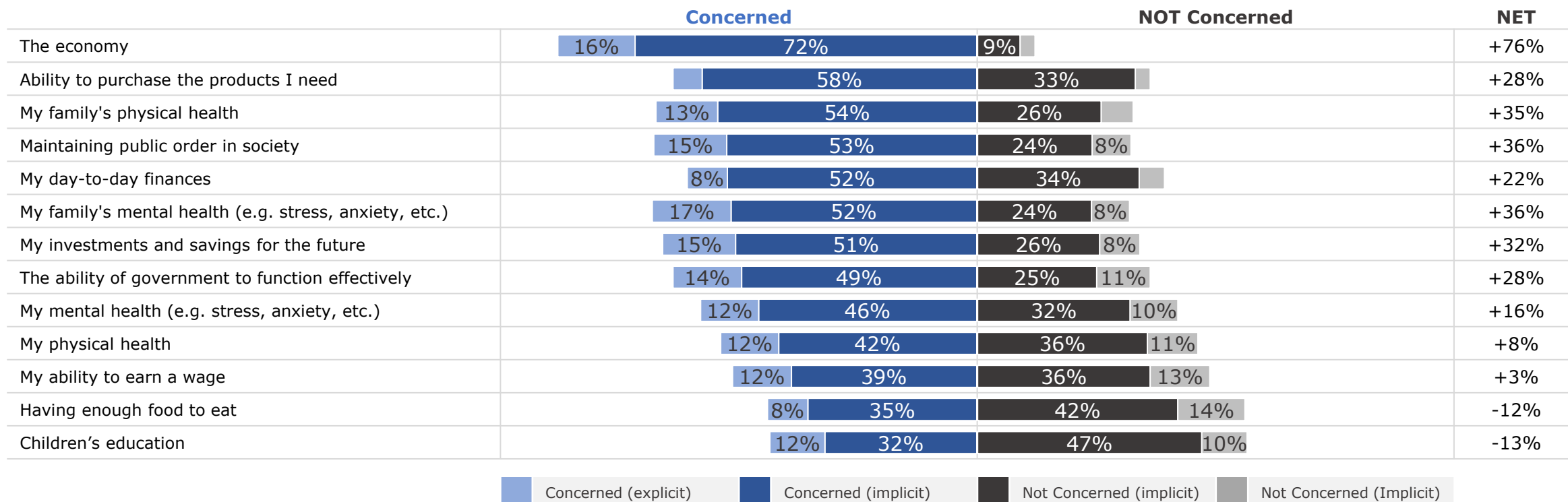


MARCH 2020

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.

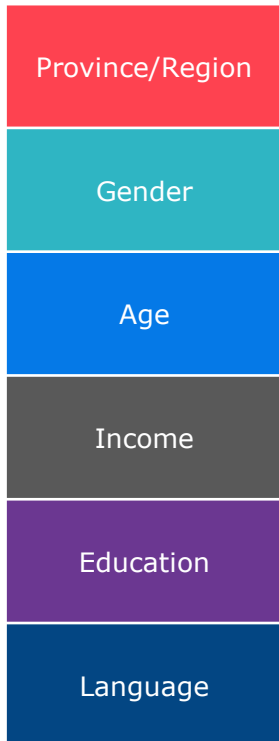
IMPLICIT ASSOCIATION – CONCERNS DURING COVID-19 PANDEMIC



Those in Western provinces, women, lower earners, and Gen X are more concerned than their counterparts

- Of the 13 possible concerns we tested, those in the Provinces of Manitoba, Saskatchewan, and Alberta average about 9 per person.
- Women average 8.5/13 concerns per person, while men only have an average of 7.4 concerns.
- Quebecers seem to be much less concerned about COVID-19 than any other province, averaging just 7 concerns per resident.

NUMBER OF CONCERNS PER PERSON (OUT OF 13 TESTED)



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

	Province/Region						Gender		Age			Income			
	Total	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%

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%		

C2. Please indicate the extent to which you agree or disagree with each of the following statements

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...	
I really miss watching sports	+20% (M vs. W)
I feel safe going shopping, so long as it is not too crowded	+10%
COVID-19 is just a temporary problem. Life will get back to normal soon	+9%
Society is overreacting to coronavirus/COVID-19	+8%

Men and Women evenly agree...	
My province's government is doing a good job protecting citizens	+3% (M vs. W)
I am concerned there is not enough trustworthy information out there	+3%
I feel well-informed about how to keep myself protected from COVID-19	0%
I believe that coronavirus/COVID-19 is a hoax and/or conspiracy	0%
I am concerned about personally contracting coronavirus/COVID-19	-1%
I believe there will be a coronavirus/ COVID-19 vaccine widely available in 2020	-2%
I worry that coronavirus/COVID-19 will impact the economy for a long time	-4%
I am concerned about the healthcare system's ability to handle this situation	-4%

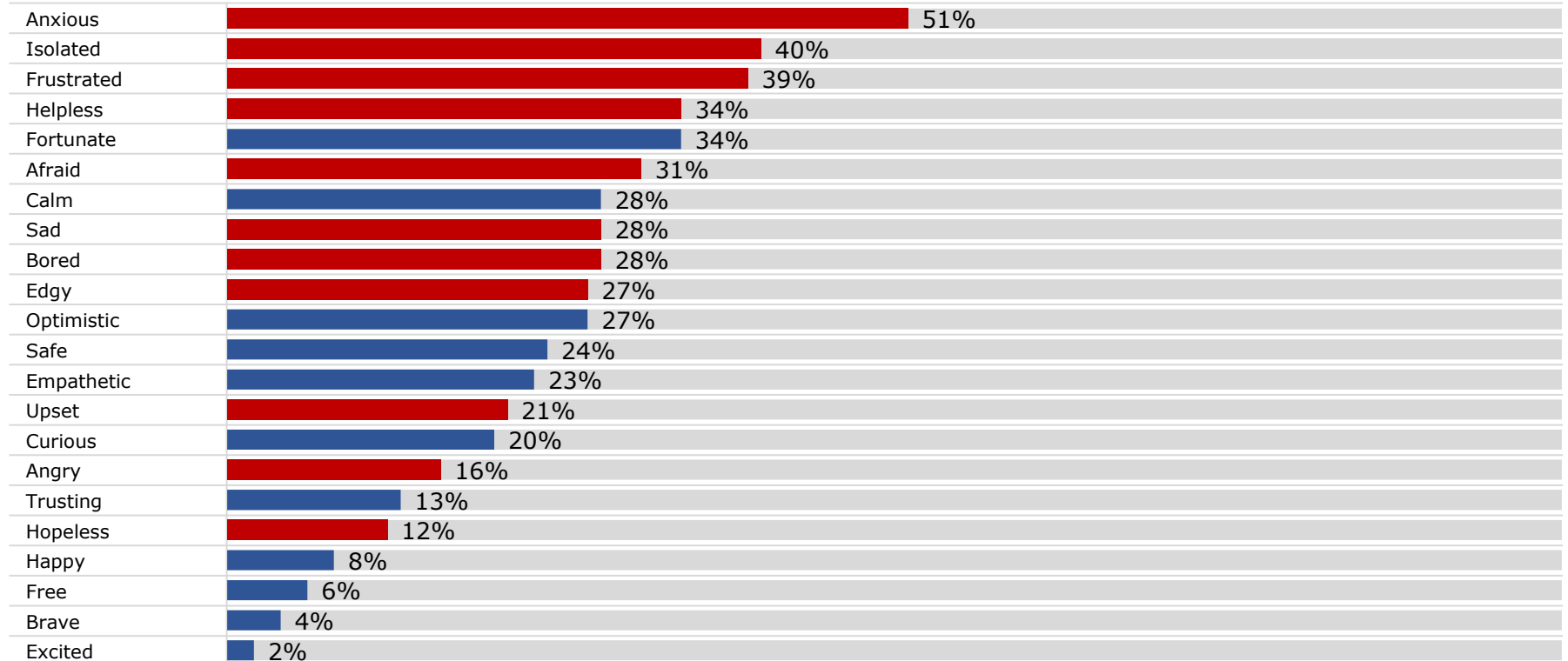
Women are MORE likely to say...	
I am worried about paying my bills (incl. rent or mortgage) if this keeps up much longer	+20% (W vs. M)
I am afraid to see my doctor because I might contract coronavirus/COVID-19	+15%
The Canadian government is doing a good job protecting citizens	+13%
I don't think life will ever be the same, after the virus	+11%
Where I live, things are going to get worse before they get better	+11%
I don't feel safe in large crowds	+9%
I don't feel safe going outside	+8%
I do not believe there are enough tests to get an accurate picture of the cases in Canada	+5%

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?









































C3. What of the following words best describe how you are feeling these days?

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

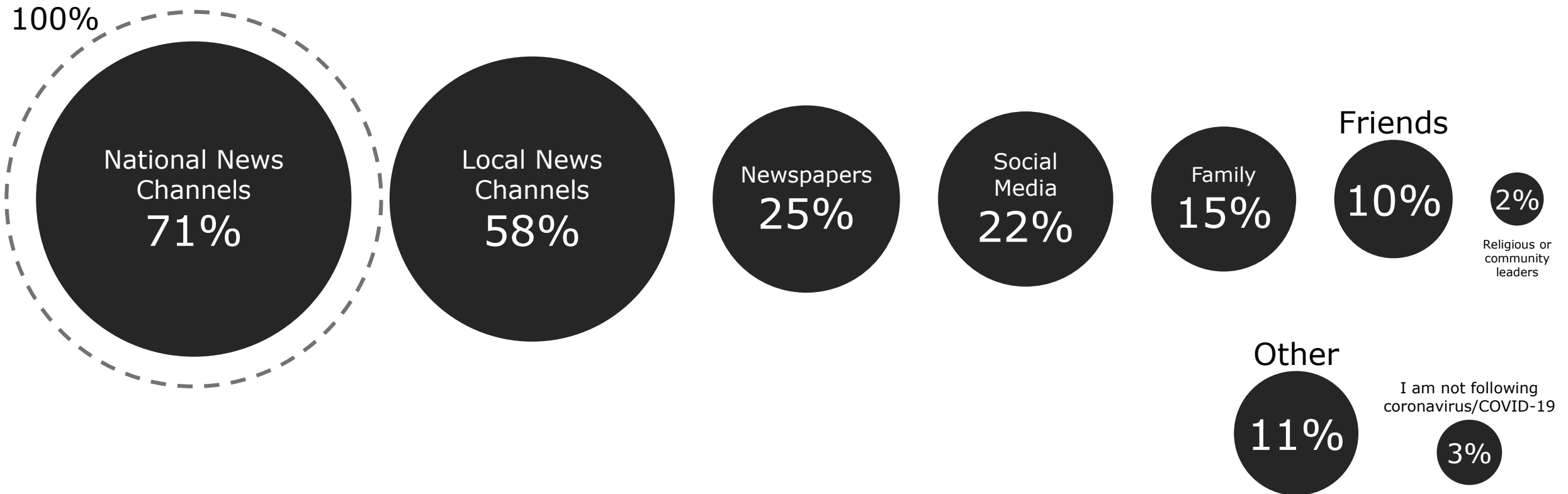
BC feels...		AB feels...		MB/SK feels...		ON feels...		PQ feels...		ATL feels...	
 Anxious	50%	 Anxious	59%	 Anxious	69%	 Anxious	55%	 Helpless	53%	 Anxious	58%
 Fortunate	43%	 Frustrated	52%	 Fortunate	47%	 Frustrated	42%	 Isolated	46%	 Isolated	55%
 Frustrated	42%	 Fortunate	41%	 Afraid	47%	 Isolated	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									

C3. What of the following words best describe how you are feeling these days?

National and local news channels (including online versions) are by far the most-preferred source for COVID-19 information

National news sources are turned to by nearly three-quarters of Canadians for information on COVID-19, while about six-in-ten turn to their local news channels. Social media has risen dramatically over the past decade as a news source, however is trusted by just 22% for timely and accurate COVID-19 information.

WHERE CANADIANS ARE TURNING FOR CREDIBLE AND TIMELY INFORMATION



Just one-quarter of Canadians reported going to work (outside the home) on Tuesday; expected to decline further

- One-half of Canadians or more watched broadcast TV, streamed content, and went grocery shopping.
- Fewer expected to go grocery shopping on Wednesday than Tuesday; perhaps many households feel they are well-stocked for the near future.
- Entertainment has ground to a halt; just 5% got together with friends, 3% went to a bar or restaurant, 1% went to the gym, and virtually nobody traveled by air.

PAST-24 HOUR ACTIVITIES, ANTICIPATED NEXT-24 HOUR ACTIVITIES

	Past 24-Hour Activities	Anticipated Next-24 Hour Activities	Anticipated Change
Watch broadcast TV (i.e. tv coming through a cable, satellite, or antenna)	59%	52%	-7%
Watch streamed content (e.g. TV or movies)	51%	46%	-5%
Go grocery shopping for food or health-related home essentials in a physical store	50%	39%	-11%
Go to work (outside your home)	24%	21%	-3%
Go shopping for things other than food or health-related home essentials in a physical store	14%	8%	-6%
Go through a drive-thru for food or coffee	13%	13%	--
Purchase groceries health-related home essentials online	10%	7%	-3%
Purchase things other than food or health-related home essentials online	10%	9%	-1%
Get together with extended family (i.e. family who do not live in your home)	8%	7%	-1%
Take public transit	6%	6%	--
Get together with friends	5%	4%	-1%
Talk to a healthcare professional about coronavirus/COVID-19	5%	3%	-2%
Sit down in a bar or restaurant	3%	1%	-2%
Donate to charity	2%	3%	+1%
Go to the gym	1%	1%	--
Book a vacation for some time in 2020	1%	1%	--
Go to the movies	0%	0%	--
Give blood	0%	1%	+1%
Travel by air	0%	0%	--
None of the above	8%	12%	+4%

Somebody is not admitting to buying a lot of toilet paper

- While just one-in-six Canadians (17%) admits to stocking up on extra TP for the pandemic, nearly six-in-ten report they have had a difficult or impossible time finding toilet paper, paper towels, or other paper products.
- Roughly three-in-ten say they stocked up on non-perishables, perishable food, and frozen groceries, though outages do not appear to have been a major problem in these categories.

STOCKING UP FOR THE PANDEMIC

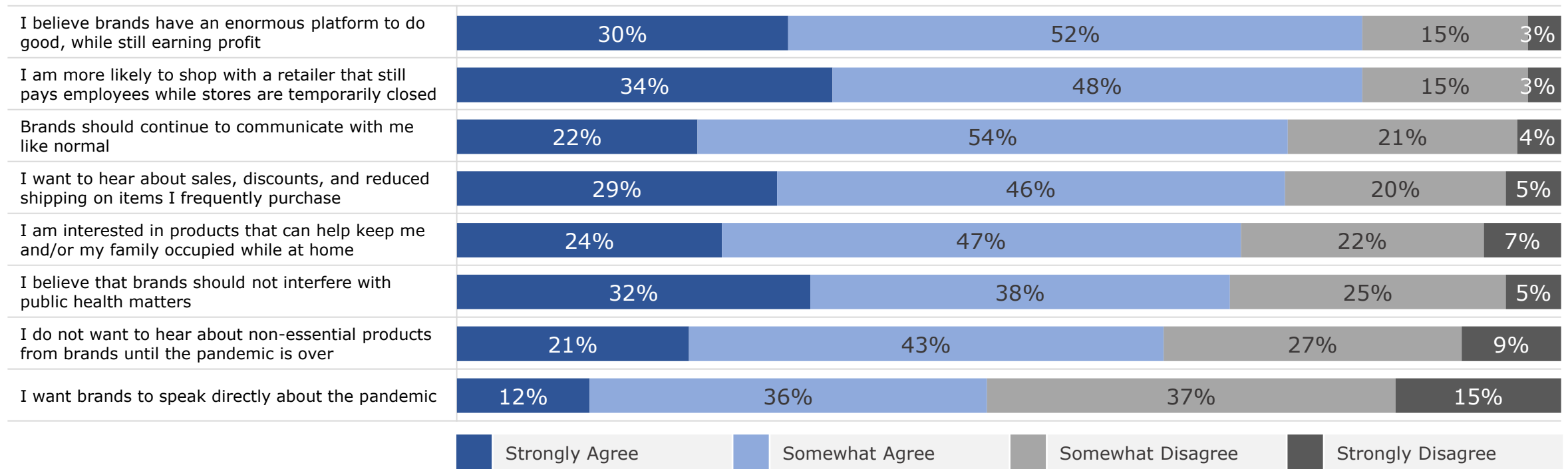
	I Have Bought Extra Supplies	This Has Been Hard to Find
Non-perishable goods (i.e., canned goods, pantry items, snacks, etc.)	32%	22%
Perishable food (i.e., Fresh fruit, vegetables, and meat)	29%	18%
Frozen groceries (e.g. meat, fruit or vegetables)	29%	17%
Water	17%	8%
Beverages (non-alcohol, non-water... e.g. juice, soda)	17%	6%
Toilet paper, paper towels, or other paper products	17%	56%
Household cleaning products	15%	20%
Personal care (i.e., toothpaste, hand sanitizers, rubbing alcohol, etc.)	14%	24%
Pet care	12%	1%
Medical Preventative Products (cough/cold/flu products, etc.)	11%	8%
Alcoholic beverages	10%	1%
Feminine care products	6%	1%
Baby care	2%	3%
Sexual Health products	1%	1%
None of the above	41%	28%

C7. What extra supplies, if any, have you purchased for your home in the last week due to coronavirus/ COVID-19?
 C8. What products, if any, have you found to be DIFFICULT OR IMPOSSIBLE to find, in the past week?

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)



More than one-half of Canadians spent less than two hours outside their home on Tuesday

On a normal Tuesday, Canadians are at work, at school, playing and attending sports and activities. For St. Patrick's Day 2020, most Canadians were outside their home for less than two hours.

HOW CANADIANS SPEND THE PAST 24 HOURS

