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Presenters only - private mode Audio mode is off

## WHAT WE WILL COVER IN THE NEXT HOUR...

### OUR WEEKLY STUDY OF CANADIANS

- HOW CANADIANS ARE FEELING
- WHAT CANADIANS ARE DOING TO SPEND TIME IN SELF ISOLATION
- WHAT CONSUMERS EXPECT FROM BRANDS

### CULTURE VULTURE (ISOLATION EDITION)

ATTENDEES

**PRESENTERS**

- Sarah Thompson (host)
- Devon Macdonald (presenter)
- Laura (presenter)
- LC@MS (presenter)

**ATTENDEES**

- +141672...7
- +141680...8

**CHAT**

Chris Kaschuk  
no sound

Lucie Prapette  
my audio is on

Maryse  
No sound

Lakshmi Radhakrishnan  
no audio

Karen Perringtill\_1  
no sound

Leticia Santos  
no sound

Sarah Thompson  
One moment

Chloe  
i don't have sound either

Sarah Thompson  
We are dialing in

Sarah Thompson  
one moment please

Sarah Thompson  
technology :)

Eric  
Thanks!

Type your message

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**MARCH 11TH**  
**WAVE 1 OF RESEARCH**  
500 REPORTED PRESUMED CASES OF COVID-19 WAS NAMED A PANDEMIC BY WHO

**MARCH 12TH**  
SOPHIE GRÉGOIRE TRUDEAU'S TEST RESULTS CAME BACK POSITIVE  
TRUMP ANNOUNCES US TRAVEL BAN TO EU

**MARCH 13TH**  
ONTARIO ANNOUNCES PUBLIC SCHOOL BOARD TO CLOSE  
TRUDEAU LIMITS INTERNATIONAL FLIGHTS TO CANADA &  
URGES CANADIANS ABROAD TO COME HOME

**MARCH 14TH**  
NFLD & PEI ANNOUNCED THEIR FIRST PRESUMED CASES

**MARCH 15TH**  
BIGGEST JUMP OF CASES IN A SINGLE DAY IN CANADA

**MARCH 16TH**  
ALBERTA & NOVA SCOTIA ANNOUNCE SCHOOL CLOSURES

**MARCH 17TH**  
**WAVE 2 OF RESEARCH**  
825 REPORTED PRESUMED CASES OF COVID-19  
ONTARIO & ALBERTA ANNOUNCED STATE OF EMERGENCY



ATTENDEES

**PRESIDENTS**

- Sarah Thompson (host)
- +141689...0 (phone)
- Devon MacDonald (presenter)
- Laura (presenter)
- LC@MS (presenter)

**ATTENDEES**

- +141656...0

**CHAT**

Unread messages: 09. Click to go to first unread message.

The dial in doesn't work

Please stay where you are. The audio will be up in a moment.

Host: what's the dial in number?

Hollegard: we cant get it either

Chris Powell: This has been my past 10 days.

Chrosine: Me too!!

Andrea: hahaha, hang tight everyone

Boris Cho: Phone access: Toronto +1(647) 497-7729 (more)  
Participant PIN: 1744499

Lynette: so we don't need to dial in? Audio will be through the computer soon?

Andrea: sarah will dial in to have audio for the group

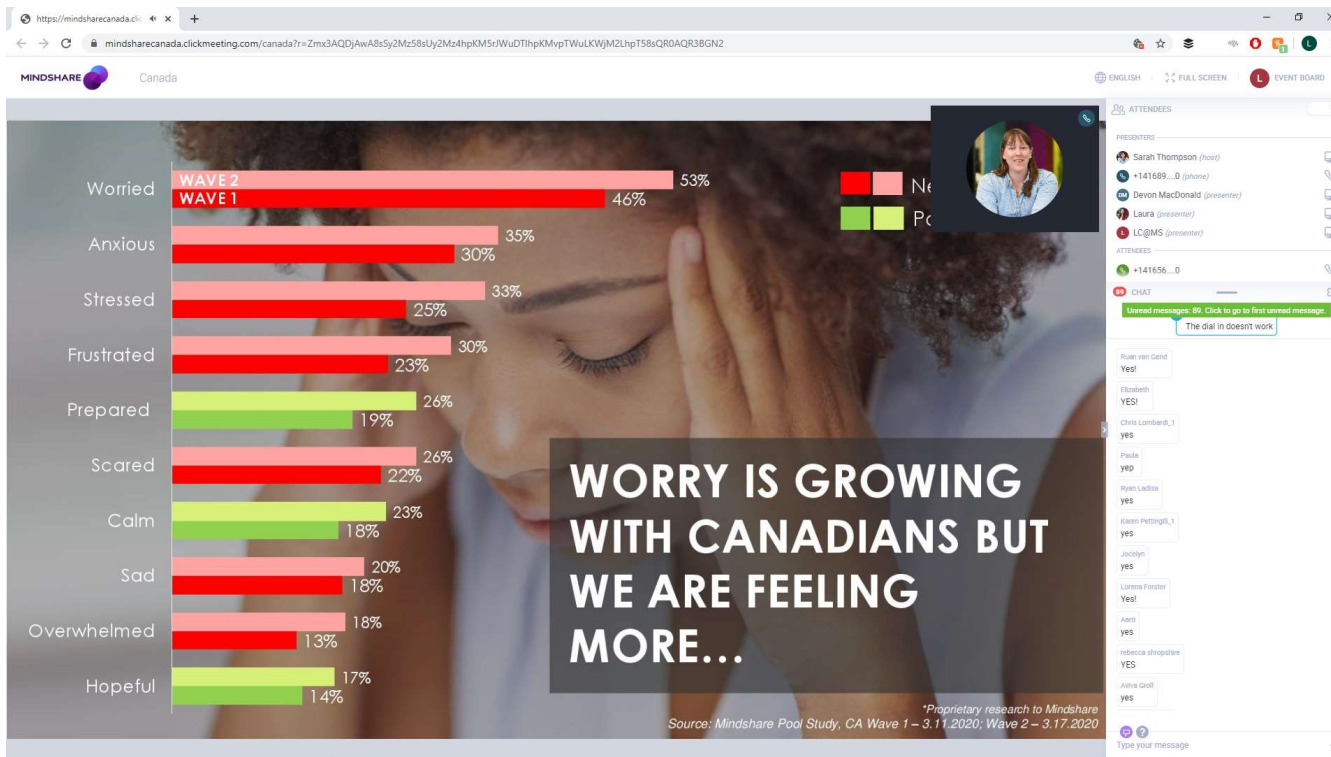
Andrea: we can stay here

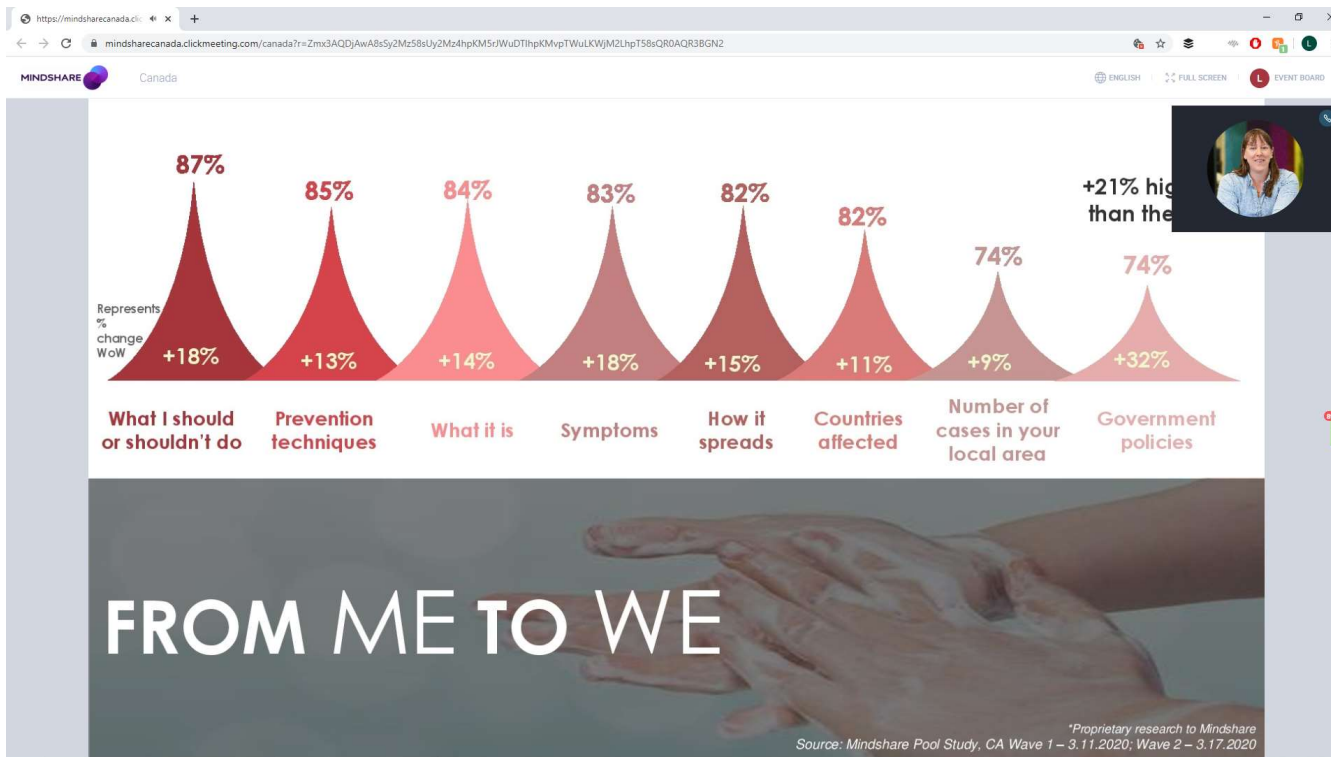
Laura

Type your message



At this point, the Canada-US Border shutdown had not been announced, the closure of Ontario/Quebec non-essential businesses, and the rest of Canada announcing provincial states of emergency.






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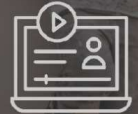
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# AS CANADIANS PRACTICE SOCIAL DISTANCING



## WE ARE SPENDING **MORE** TIME

-   
WATCHING  
LIVE TV
-   
WATCHING  
MOVIES
-   
SPENDING  
TIME ONLINE
-   
ON SOCIAL  
MEDIA
-   
STREAMING  
TV

\*Proprietary research to Mindshare  
Source: Mindshare Pool Study, Wave 2 – 3.17.2020

		CONSULT	TRUST
1	TV News Station	60% <sup>1</sup>	40% <sup>1</sup>
2	TV News Programming	51% <sup>2</sup>	27% <sup>3</sup>
3	Government Websites	39% <sup>3</sup>	31% <sup>2</sup>
4	Online News Site	38%	14%
5	Social Media	35%	5%
6	Friends & Family	33%	9%
7	News Radio Show	26%	10%
8	Print Newspaper	26%	10%
9	Radio Station	20%	6%
10	Healthcare Websites	19%	12%

**NEWS &  
GOVERNMENT ARE  
VALUED RESOURCES  
& SOCIAL MEDIA IS  
NOT TRUSTED**



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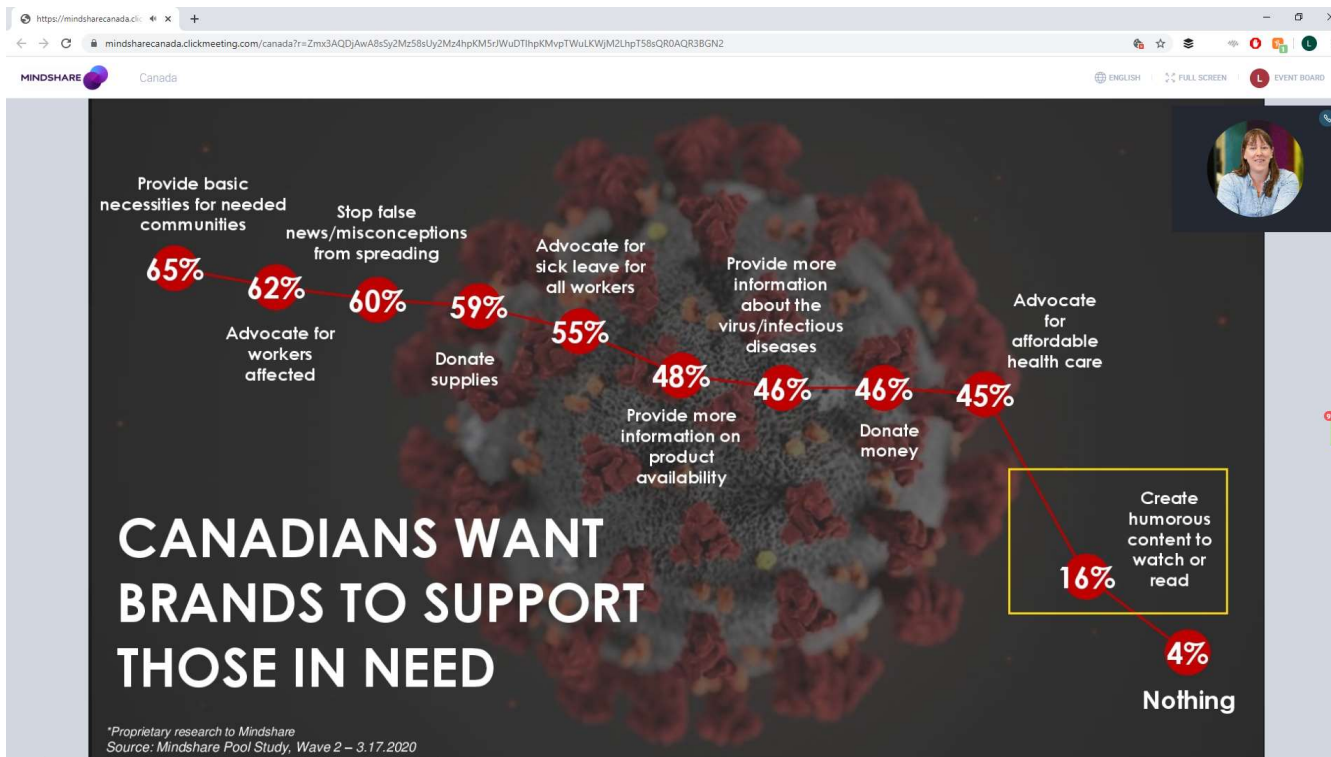
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# TRUSTED SOURCES

## TV NEWS SOURCES ARE TRUSTED IN QUEBEC

	ENGLISH CANADA	FRENCH CANADA
1	Government Websites 35%	TV News Station 51%
2	TV News Station 32%	TV News Show 37%
3	TV News Show 20%	Government Websites 25%
4	Healthcare Websites 16%	Online News Site 14%
5	Online News Site 13%	News Radio Show 14%

\*Proprietary research to Mindshare  
Source: Mindshare Pool Study, Wave 2 – 3.17.2020






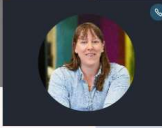



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## HOW DO WE COMPARE TO THE US






**WE ARE MORE WORRIED**  
(53% CANADA VS. 46% USA)

**HOWEVER, WE FEEL MORE INFORMED ABOUT WHAT OUR GOVERNMENT IS DOING THAN THE US**  
(74% CANADA VS. 53% USA)



**WE ARE MORE TRUSTING OF OUR TV NEWS THAN THE US**  
(40% CANADA VS. 31% USA)



**WE BOTH ARE EQUALLY AWARE OF BRANDS INVOLVEMENT**  
(65% OF CANADIANS WANT BRANDS TO HELP VULNERABLE COMMUNITIES VS. 67% OF AMERICANS THINK BRANDS SHOULD DONATE SUPPLIES)

\*Proprietary research to MindShare  
Source: Mindshare Post-Study: Canada & US, Wave 2 – 3.17.2020

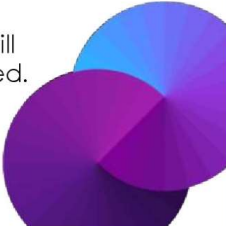
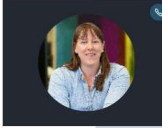
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## KEY TAKEAWAYS

- 1 WE ARE CHANGING OUR MEDIA HABITS QUICKLY.**  
COVID-19 is quickly impacting consumer sentiments, opinions, purchase behaviours, and media habits and it is still changing and evolving.
- 2 WE ARE CONSUMING MORE.**  
TV, Radio, and Print are core touchpoints for Canadians to stay up to date – however, Canadians are still spending more time online and with social media.
- 3 BRANDS ARE EXPECTED TO ACT.**  
Canadians expect that brands who engage in COVID-19 activity will do so to support vulnerable communities in Canada who are in need.



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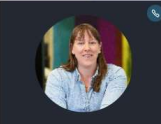
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# culture vulture

CULTURAL THINGS WE ARE SEEING  
IN CANADA AND AROUND  
THE WORLD AND PREDICTIONS

THE ISOLATION EDITION  
2020


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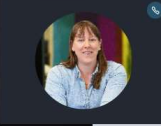
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WHAT WE ARE SEEING

People supporting each other in new ways

community

self

People exploring self improvement and enriching activities

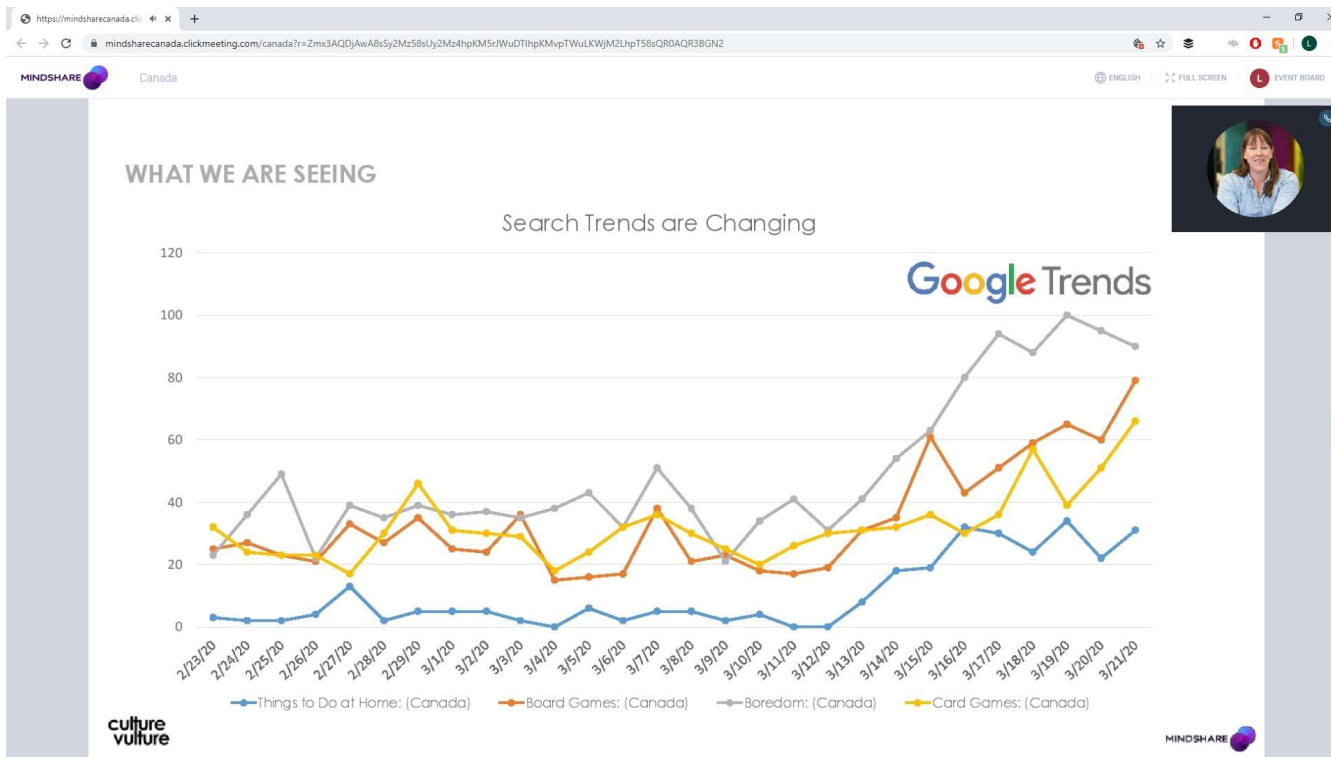
Brands leaning into this moment in history and keeping the industry wheels moving

industry

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community.


"The best way to cheer yourself is to try to cheer somebody else up" - Mark Twain

culture  
culture

THE ISOLATION EDITION

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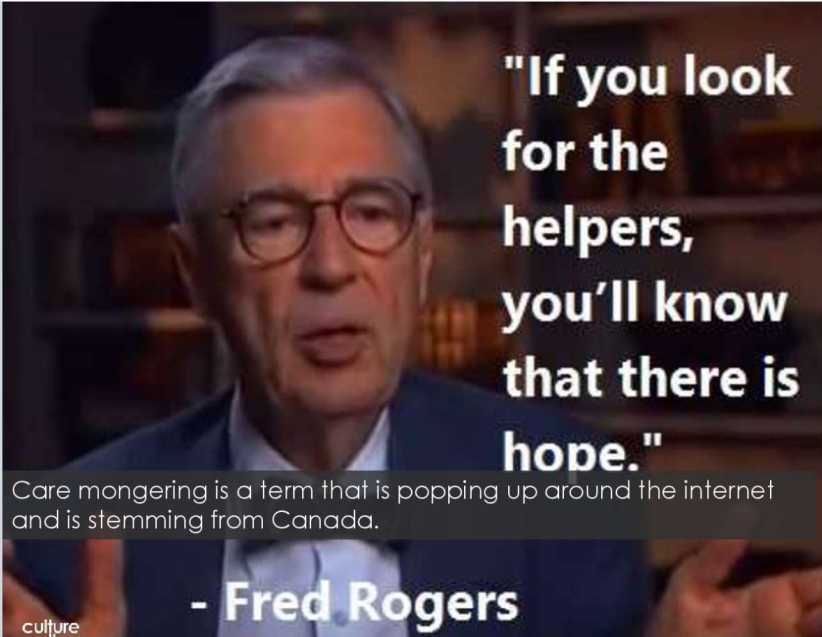
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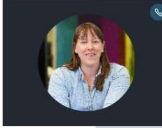


"If you look for the helpers, you'll know that there is hope."

Care mongering is a term that is popping up around the internet and is stemming from Canada.

- Fred Rogers

culture



**KINDNESS IS HAPPENING.**

Facebook Groups are popping up across the country with the name "Care Mongering" as a central place for people who need help to get it. In Toronto, there is a group of 14,000 and growing. There are 30 groups now in Canada.

**Prediction:**  
People will maintain these groups and continue to help each other out in cities across Canada.

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Inbox - Lisa Dillon...

mindshare ppt...


2:26 PM

2020-03-24

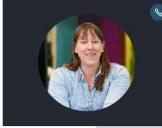
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**MUSIC KEEPS PEOPLE CONNECTED.**

The Italians started a viral musical sensation with people singing across balconies together.

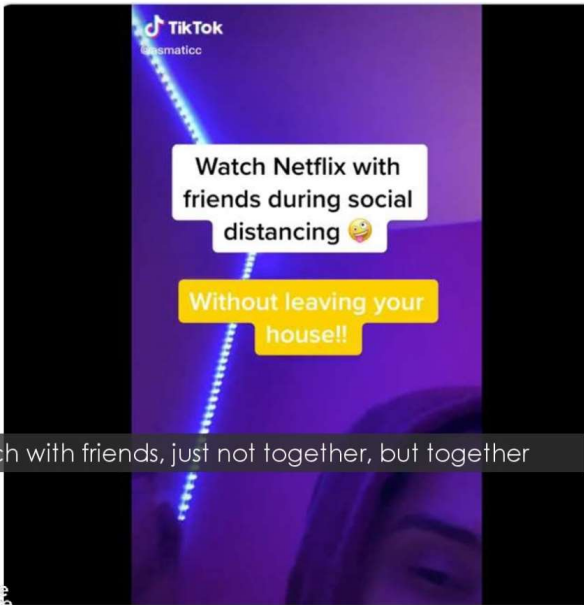
**Prediction:**  
People know what song is being sung every evening due to WhatsApps connecting neighbourhoods. This will continue to keep neighbours connected in communities.

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**Watch Netflix with friends during social distancing 🤝**

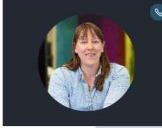
**Without leaving your house!!**

Watch with friends, just not together, but together

**SHARED VIEWING IS HAPPENING.**

Netflix Party is a chrome extension that allows for many people to sit and watch a show together with chat. There is one for Disney+ too.

**Prediction:**  
Group watching will finally take off and will be the hidden media activity that will grow faster than expected in 2020.



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**COMMUNITY BONDING.**

People are building community sites and process to help keep local businesses alive. Many are call this "dining bonds."

In SF, this is the quickest way to get a gift card and keep the businesses open.

In NYC, Helpmainstreet.com has appeared to do the same thing. There is also Cellars NYC that is selling the wine supply of restaurants to help them with cash flow.

**Prediction**  
Community activism for local business will continue to surge post pandemic crisis. And they will join forces into marketplaces.

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**the neighbourgood**

shop redeem for merchants contact us about us

support local businesses  
It's easy to support your favorite local businesses today, even during more social times.

we're the neighbourgood  
your local not-for-profit helping small businesses with support from you, the local community.

**Your favorite SF restaurant might close forever. Help save it.**  
Gift cards help "flatten the curve" of lost income from COVID-19.

**Solving the needs of local business**

Or explore by neighborhood

Business District Pacific Heights North Beach & Chinatown Napa & Sonoma Valley Richmond District Sonoma Valley West Portal & Sausalito

**CELLARS NYC** View map Support restaurant About

**Save NYC restaurants by buying their wine**  
You can't have the best of both worlds of food and wine until now—Cellars NYC does it for you.

Join a restaurant

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STREAMING = CONTENT

Fundraising has gone to streaming very quickly with communities working on music, gaming and other streams that go on and on and on. In China, JD started 3-hour live shows called online clubbing that saw sales increase by 30%.

Prediction:

Non-for-profits will need to consider stream-a-thons as a new method of fundraising.

For profits, exclusive online content streaming as a new way to connect with audiences.

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PATREON

weird  
stream-a-thon

MARCH 18, 4PM-7PM PST

京东超市

JD  
音乐合

新内容是我们的优势 欢迎来到直播的大厅

京东超市

PeafrogSims @peafrogSims · Mar 15

Streaming today in two hours, after @SikenSims ! What should I do on my 5 hour stream? YOU decide! #switch @SimStreamSquad #SimStreamSquad #streamathon #Sims4

Carry on Simself & hammy

39.1%

Do a Build Challenge

34.8%

100 Baby!

26.1%

23 votes · Final results

1

2

7

SOUTH BAY  
STREAM-A-THON

PLEASED + THE LUCKY SIMS +  
JAZZAL SIMS + FISHIES & SIMS +  
KARASIMMONS & HEARTS PRODUCTIONS +  
POTTERY POTIONS & BAKES


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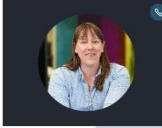
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Something to do, together

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### VR COMES BACK

VR becomes the solution for travel bans and hanging out together.

Second Life is having a second life. They are targeting the corporate sector (again).

**Prediction:**  
VR finally becomes the "other" place to hang out (again). This will create the comeback for us as we search for a Zoom alternative.

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self

"Self Isolation is a great time for self improvement"

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culture

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Online learning is about to boom

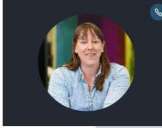
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culture

### ISOLATED LEARNING

Access to online education from Ivy League schools to being able to tour a museum from your home to tapping into a live stream to learn to cook, draw or play an instrument are all in play for people in isolation.

**Prediction:**  
The new media channel – eLearning. People will take time from people will be learning something new as this could become a new habit/hobby.

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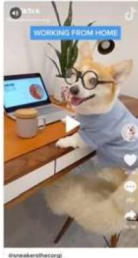
SO MUCH TO WATCH.

The surge in content created right now on social media channels from TikTok to Instagram is due to bored teens at home and organic challenges that are popping up. #stayathomechallenge

Prediction:  
People that never made content before now do and we will continue to see growth for a few months. TikTok is and will continue to surge.


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WORKING FROM HOME




thelakeofthetong

High school for (Chris) video (30)




highschoolfor (Chris) video (30)

First day of online school cause of corona



firstdayofonline school cause of corona

Did you know why Bette and I are here?



Did you know why Bette and I are here?

So much content to make...

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# industry.

Adapting and evolving

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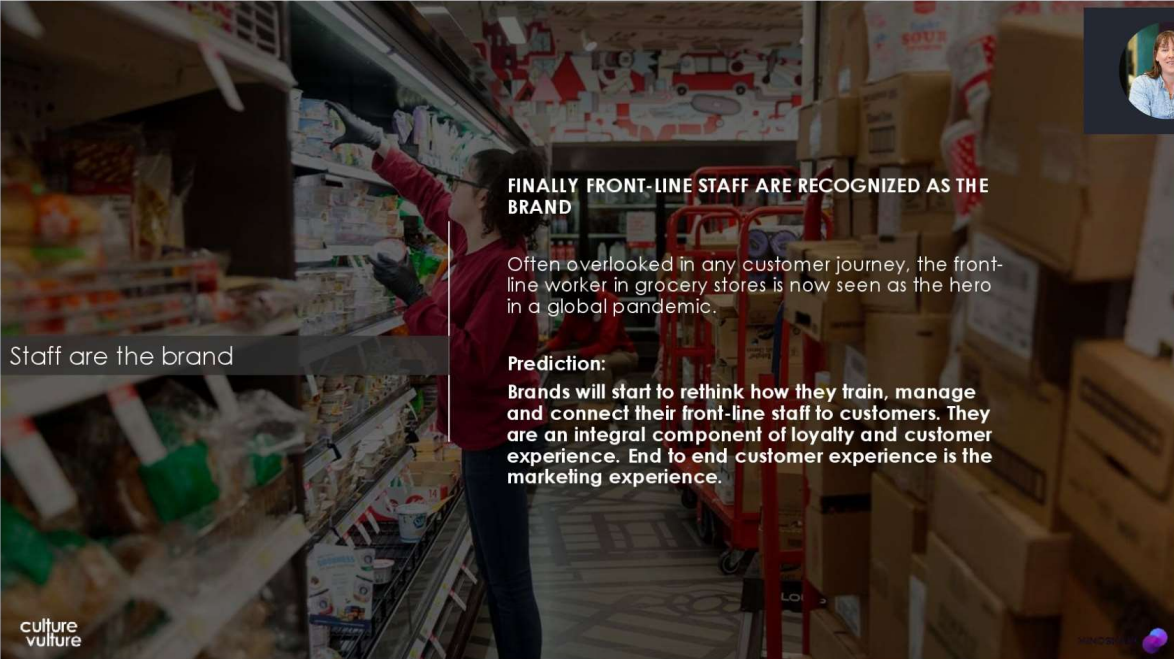
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Staff are the brand

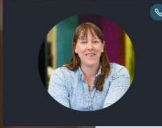
**FINALLY FRONT-LINE STAFF ARE RECOGNIZED AS THE BRAND**

Often overlooked in any customer journey, the front-line worker in grocery stores is now seen as the hero in a global pandemic.

**Prediction:**  
Brands will start to rethink how they train, manage and connect their front-line staff to customers. They are an integral component of loyalty and customer experience. End to end customer experience is the marketing experience.

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Musicians can make money for themselves

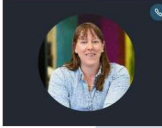
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### MUSIC FOR MONEY

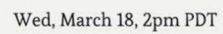
Multiple artists are giving away free live streamed or recorded performances and what they are finding is excitement to be able to access and chat about music. Ben Gibbard and the Dropkick Murphys have already done performances.

**Prediction:**  
Musicians will flock to a new stream of revenue from fans by performing pay for concerts in streaming platforms. This will create a new avenue for brand sponsorships.

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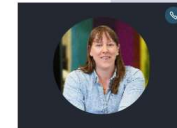
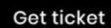






MEMOIR  
*The Valedictorian of  
Being Dead*

and scientifically fascinating, *The Valedictorian of Being Dead* brings to light a groundbreaking new treatment for depression.




Join your favorite authors on Zoom where you can have spirited discussions from the privacy of our own quarantined space. Platforms like Patreon are making this easier.

**Prediction:**  
Authors will do the same thing...and find that going to a bookstore to connect with fans is no longer necessary.

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Meal Kits are Booming and Grow

**KIT MY MEAL**

With no restaurants and limited cooking skills people are turning to meal kits quickly.

**Prediction:** Canadians will see their pocketbooks lighten and eat at home again.

Grocers in Canada will need to up their game or purchase one of the meal kit providers.



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## THE NEW LOCAL MARKETPLACE

Farmer's Markets and others local business go to eCommerce platforms to keep their businesses moving. The new digital Main Street is starting to emerge. Much of the sentiment of Canadians is around saving the local store. Apps like Cornerstore are also starting to grow quickly.

Keep in mind – eCommerce has a long way to go in Canada.

### Prediction:

Local businesses find some support in local communities and start to find holes in the Amazon armor of the marketplace. Shopify will do very well in this reality.

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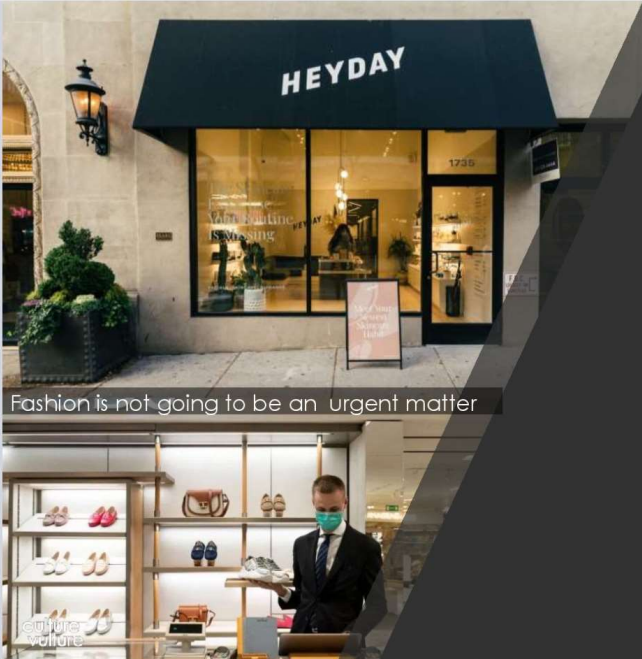
The screenshot displays the FoodHub website interface. At the top, there's a navigation bar with links for HOME, PRODUCT LIST, MEET YOUR PRODUCERS, and SIGN UP. Below this, a banner indicates the current ordering period closes on Monday, March 22 at 7:00 PM. The main content area is titled 'All Products' and 'Vegetables', featuring a grid of product listings such as 'Micro Greens - Nasturtium', 'Micro greens - Pea Shoots', 'Micro Greens - Pop', 'Micro greens - Sunflower S...', 'Organic Microgreens - Gre...', 'Organic Microgreens - Red...', 'Organic Pea Shoots (Large...', and 'Organic Sunflower Shoots'. Each listing includes a small image, the product name, and the price. A video overlay on the right side of the product grid shows a woman in a blue shirt. Below the product grid, a dark banner with the text 'Businesses go online that weren't before' is visible. At the bottom of the screenshot, there's a 'Shop Locally' section with the text 'Connect to premium brands and in-stock products at your favorite local shops.' and a search bar with the text 'Shop Locally in Toronto, ON' and a 'Search' button.

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Fashion is not going to be an urgent matter

### FASHION TAKES A BIG HIT.

Fashion brands have halted their eCommerce operations mostly because their supply chain is slow, and the consumer demand has halted. As people are working from home, spending money on clothes has stopped. Fashion influencers are dressed in their sweats. And with China and Italy closed for manufacturing, this will be a long return to have supply chain working again. (In fact, 40% of clothing comes from China.) Fashion magazines are shutting.

**Prediction:**  
Fashion (and beauty) won't be the same. We won't feel the need to refill our closets, two seasons will be missed, and we will start to continue the trend with renting and buying gently used – this is an industry that won't be the same again. The great Depression motto of "Repair, reuse, make do, and don't waste anything" will come to be again. Minimalism will thrive, excess will not.



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Movies go home...


MOVIES ARE DEMANDED


Many movies are going to VOD faster and are skipping the theater entirely. With 4K TVs at home and snacks, will people start to see that the movie theatre isn't that great? More will go VOD as this drags on in the US.

Prime Video Cinema Hub has launched.

Prediction:

Theatres will have to massively overhaul their service and capabilities to address the new model that appears. New models will be created for advertising for first run movies – online.





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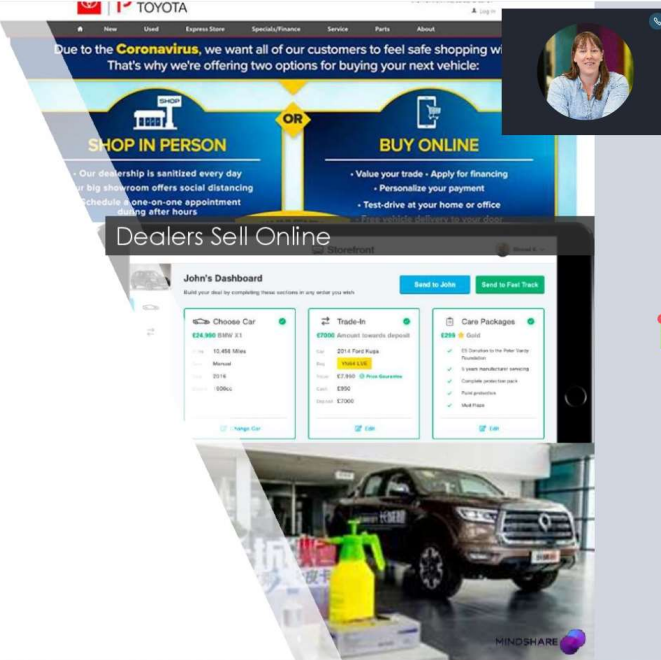
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## DEALER EVOLUTION

Slow foot traffic in China to dealers as well as the requirement to book in advance and take measures continues to affect automotive sales. Websites for dealers that were locked with limited functionality will need to evolve quickly. SilverBullet, a leading dealer eCommerce service is offering a free trial.

**Prediction:**  
This will speed up to shift to bringing the test drive to people and eCommerce in automotive.

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The screenshot shows a Toyota dealership website. At the top, a banner reads: "Due to the Coronavirus, we want all of our customers to feel safe shopping with us. That's why we're offering two options for buying your next vehicle: SHOP IN PERSON OR BUY ONLINE". Below this, the "Dealers Sell Online" section features "John's Dashboard" with three main categories: "Choose Car", "Trade-In", and "Care Packages".


Choose Car	Trade-In	Care Packages
<b>\$24,999 BMW X1</b>	<b>\$7,500</b> Amount towards deposit	<b>\$299</b> Gold
Year: 2018	Year: 2015 Ford Focus	✓ 60 months or 100,000 km (whichever comes first)
Mileage: 100K	Year: 2014	✓ 3 years manufacturer warranty
Color: 100K	Year: 2013	✓ Complete protection plan
	Year: 2012	✓ Roadside assistance
	Year: 2011	✓ Wheel & tire

Below the dashboard, there is a photo of a dark-colored Toyota SUV parked in a showroom.



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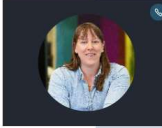
The isolation baby boom

culture  
culture

SHORT BABY BOOM

Many people are predicting that in 9-10 months there will be a surge of new births comparable to that of the surge after WWII.

**Prediction:**  
The baby boom will happen but not to the size people expect or for long as the recession will have more people watching their dollars not growing their families.




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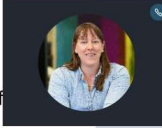
Welcome to the homebody economy.

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### The New World

"Meanwhile, new types of consumption continue to grow, such as online shopping and other online services, providing new impetus to economic growth."  
- Ha Zengyou, director-general of the department of employment and income distribution under the National Development and Reform Commission, China

**Prediction:**  
People who never "eCommerced" or used delivery services will keep doing so post-quarantine.



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