



BACK TO THE BASICS:

Delivering Meaning in Post-COVID Canada

MARCH 28, 2020

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Anstice is a research and marketing communications consultancy that uses human science-based approaches to inform on and solve business problems.

Services include insights and stakeholder engagement, digital marketing, public relations, issues management, design, customer experience and marketing & brand strategy.



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Why This Survey?

- People expect meaning from what they purchase, but what does “meaning” look like in a post-COVID world?
- Humanity is currently in the midst of a global pandemic related to the COVID virus. Everyone on the planet is being encouraged or mandated to isolate to avoid spreading the virus.
- Millions of jobs have been lost are more are in jeopardy.
- We wanted to reach out to Canadians to find out what the organizations that serve them can do to add meaning to the lives of Canadians now, and after the crisis is over.
- We discovered that things are changing out there.

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- Challenges & Objectives
- Methodology & Limitations
- Overview
- Detailed Findings
- Summary & Recommendations

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Challenges & Objectives

Challenges & Objectives

Business Challenge

- Consumers demand meaning from what they buy.
- How will meaning shift in a post-COVID world?

Research Objective

- Gauge what might bring meaning after the COVID-19 crisis.

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Why Meaning?

When you focus on bringing meaning to people:

- You help them live their own values
- You connect with them for a longer time
- You start finding innovative ways to add value
- You think differently about knowing who they are
- You bring them closer into your planning process
- Your team focuses on what matters

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You can persuade people without knowing them, but to create meaning requires intimate understanding.



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Methodology & Limitations

Methodology & Limitations

Research Objectives

- Measure attitudes related to thoughts, feelings and attitudes about changes related life in this crisis, including personal priorities, spending habits, expectations of brands, communications tools, various essential services, working from home, and related matters.
- Use grounded theory to explore any relevant thoughts, feelings and emotions.
- Discover anomalies or interesting hidden data that might be useful in building post-COVID-19 strategies for developing products, services, communications and community engagement.

Methodology & Limitations

Methodology

- Online survey of Canadians
 - *Non-random* sample
 - n=802
 - March 19-21, 2020
 - Confidence Interval: 95%
 - Margin of Error: 3.47%
- Note on Generations:
 - Gen Z: 16-23 years
 - Millennials: 24-37 years
 - Gen X: 38-56 years
 - Boomers: 57-64 years

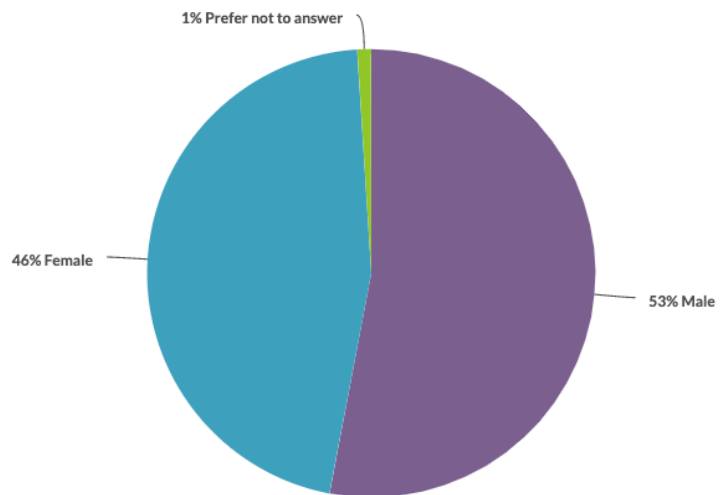
Limitations

- This is NOT a random sample of all Canadians. This report indicates opportunities for further research, as noted. Findings should be taken as statistically valid within the surveyed respondents but not be extrapolated beyond that group. Population ratios may not match GenPop census data, including low response from Québec and Eastern Canada. Qualitative findings are intended to be directional only.

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Methodology & Limitations

Sex & Age



Value	Percent	Responses
15 or younger	0.6%	5
16 to 23	11.3%	91
24 to 37	31.3%	251
38 to 56	34.4%	276
57 to 64	12.3%	99
65 to 74	7.9%	63
75 or older	2.1%	17

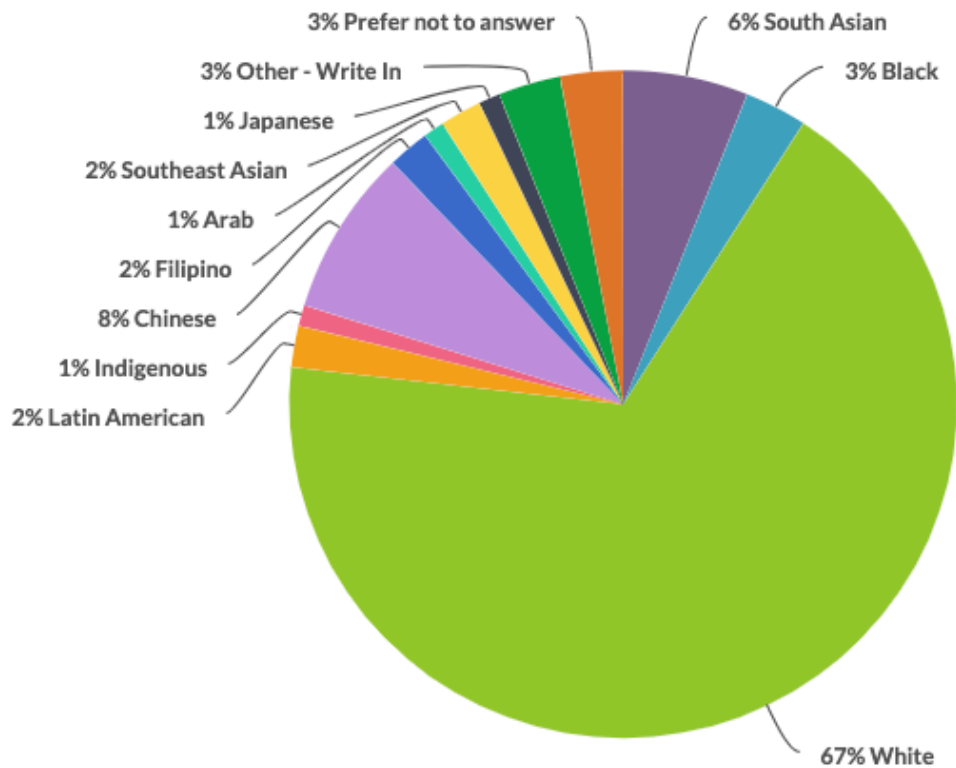
Totals: 802

Note: Not GenPop

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Methodology & Limitations

Ethnicity

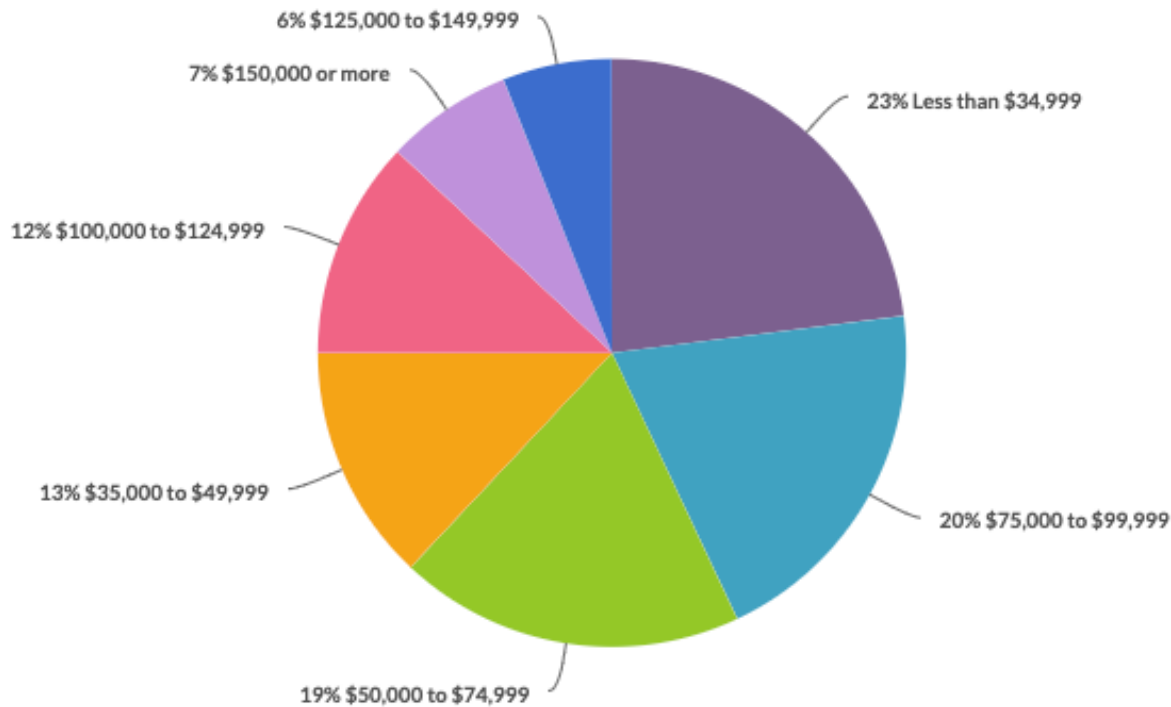


Note: Not GenPop

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Methodology & Limitations

Household Income













Note: Not GenPop

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Methodology & Limitations

Province

Province	Value	Percent	Responses
Ontario		39.7%	318
British Columbia		25.4%	204
Alberta		19.8%	159
Manitoba		7.0%	56
Saskatchewan		6.6%	53
Quebec		0.6%	5
New Brunswick		0.4%	3
Northwest Territories		0.2%	2
Newfoundland and Labrador		0.1%	1
Nova Scotia		0.1%	1

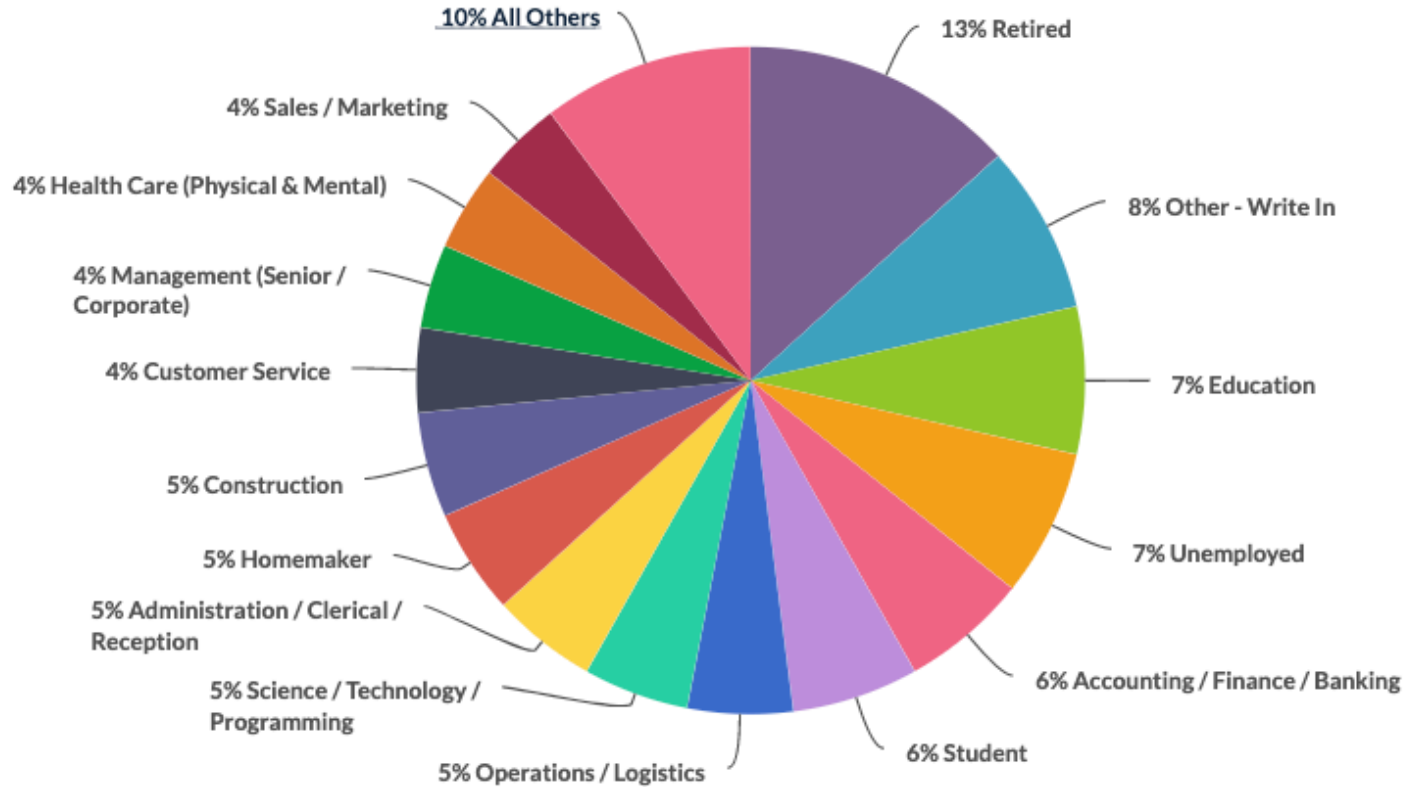
Totals: 802

Note: Not GenPop

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Methodology & Limitations

Role



Note: Not GenPop

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Overview

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Back to Basics



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Consumerism is Cancelled

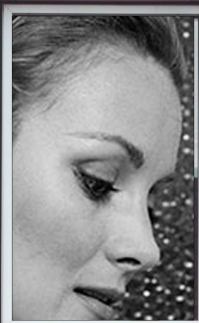
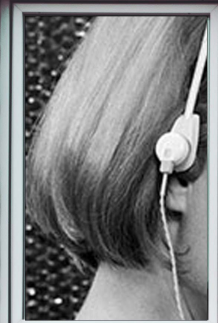


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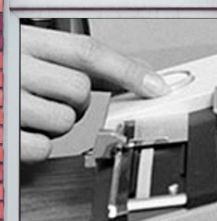
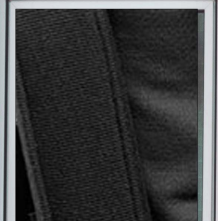
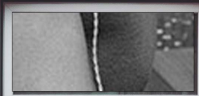
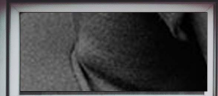
Energy Matters Again



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WFH



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The image is a collage of three vertical panels. The left panel shows a man with dark hair and a beard, wearing yellow-rimmed glasses and a white t-shirt. The middle panel shows a woman with dark hair, smiling, wearing a black top and a thin necklace; a horizontal strip of a cartoon character with large blue eyes is overlaid on her face. The right panel shows a woman with long brown hair, smiling, wearing a black and white diamond-patterned shirt; a horizontal strip of a cartoon character with large red eyes is overlaid on her face.

Now It's About Strangers

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Detailed Findings

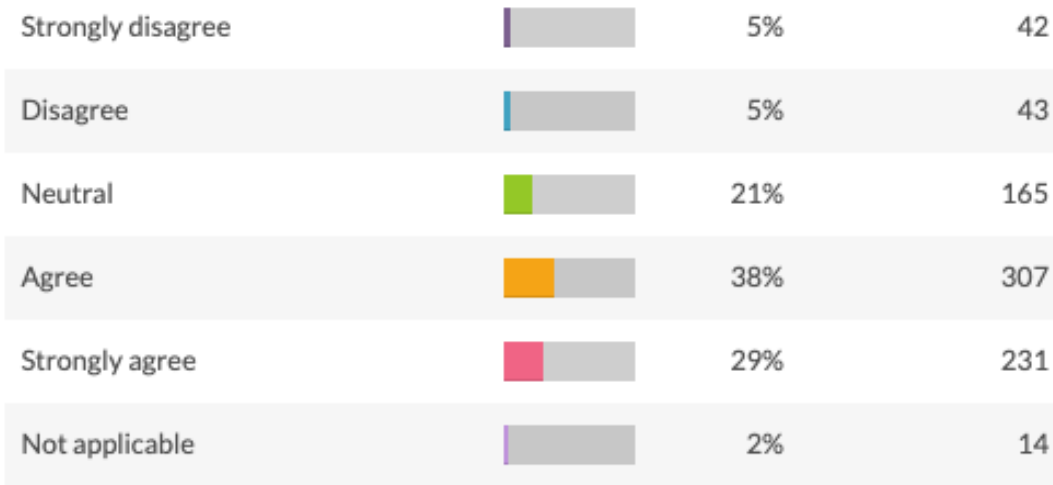
Basics of Life

*How much do you disagree
or agree with this statement:
"The basic aspects of life are
now more important to me
because of this crisis."*

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Basics of Life

How much do you disagree or agree with this statement: "The basic aspects of life are now more important to me because of this crisis."



Totals: 802

Basics of Life

Implications

- When people are valuing toilet paper like prison cigarettes, you know that the nice-to-haves are less important. For now, at least.

Recommendations

- When serving and communicating with Canadians, organizations should consider making a clear connection between the meaning they bring to people and the basics of life.
- There may be an opportunity to demonstrate how your organization or brand impacts or improves the basic aspects of life for those now confined to one location.
- Consider skewing this messaging towards **women**.
- Consider skewing this messaging this towards **Gen Z, Boomers and 65+, skipping Millennials and Gen X.**

Basics of Life

Related Facts

Sex

- Men generally are more likely to *Strongly/Disagree*.
- Women are more likely to say *Strongly Agree*.

Age

- Gen Z & Millennials are more likely to say *Strongly/Disagree* or *Neutral*
- Gen X are more likely to say *Strongly Agree*.
- Boomers are more likely to say *Disagree* and *Agree*

HHI

- <\$35k are more likely to disagree.
- \$25k-\$35k are more likely to say *Strongly Disagree*
- \$75k-\$100k are more likely to Strongly Disagree
- \$150k+ are more likely to *Disagree* or *Strongly Agree* (bimodal)

Demographic Details

	What was your sex at birth?		Row Total	What is your age?						Row Total	What is your household income?								Row Total
	Male	Female		16 to 23	24 to 37	38 to 56	57 to 64	65 to 74	75 or older		Less than \$25,000	\$25,000 to \$34,999	\$35,000 to \$49,999	\$50,000 to \$74,999	\$75,000 to \$99,999	\$100,000 to \$124,999	\$125,000 to \$149,999	\$150,000 or more	
How much do you disagree or agree with this statement: "The basic aspects of life are now more important to me because of this crisis."																			
Strongly disagree	24	17	41	9	16	13	1	1	0	40	7	5	5	5	11	5	2	2	42
Frequency	24	17	41	9	16	13	1	1	0	40	7	5	5	5	11	5	2	2	42
Row %	59%	41%	5%	23%	40%	33%	3%	3%	0%	5%	17%	12%	12%	12%	26%	12%	5%	5%	5%
Column %	6%	5%		10%	6%	5%	1%	2%	0%		7%	6%	5%	3%	7%	5%	4%	4%	
Index	107	88		194	125	92	20	31	0		125	117	92	61	130	99	72	67	
Disagree	26	15	41	2	18	12	8	2	0	42	8	3	4	9	9	5	1	4	43
Frequency	26	15	41	2	18	12	8	2	0	42	8	3	4	9	9	5	1	4	43
Row %	63%	37%	5%	5%	43%	29%	19%	5%	0%	5%	19%	7%	9%	21%	21%	12%	2%	9%	5%
Column %	6%	4%		2%	7%	4%	8%	3%	0%		8%	4%	4%	6%	6%	5%	2%	7%	
Index	116	78		41	134	81	151	59	0		140	69	72	108	104	96	35	131	
Neutral	98	66	164	21	48	60	20	14	2	165	31	16	25	37	27	14	7	8	165
Frequency	98	66	164	21	48	60	20	14	2	165	31	16	25	37	27	14	7	8	165
Row %	60%	40%	21%	13%	29%	36%	12%	8%	1%	21%	19%	10%	15%	22%	16%	8%	4%	5%	21%
Column %	23%	18%		23%	19%	22%	20%	22%	12%		30%	20%	25%	24%	17%	15%	13%	14%	
Index	109	86		110	91	103	96	105	56		141	96	117	115	81	70	64	68	
Agree	169	135	304	33	97	95	48	27	6	306	33	31	35	58	61	44	23	22	307
Frequency	169	135	304	33	97	95	48	27	6	306	33	31	35	58	61	44	23	22	307
Row %	56%	44%	39%	11%	32%	31%	16%	9%	2%	39%	11%	10%	11%	19%	20%	14%	7%	7%	39%
Column %	40%	37%		36%	39%	34%	48%	43%	35%		31%	39%	34%	38%	38%	46%	44%	39%	
Index	102	95		93	99	88	124	110	90		81	99	88	97	98	119	114	101	
Strongly agree	104	127	231	24	68	95	19	17	7	230	24	22	31	42	50	24	19	19	231
Frequency	104	127	231	24	68	95	19	17	7	230	24	22	31	42	50	24	19	19	231
Row %	45%	55%	30%	10%	30%	41%	8%	7%	3%	29%	10%	10%	13%	18%	22%	10%	8%	8%	29%
Column %	24%	35%		26%	27%	34%	19%	27%	41%		23%	28%	30%	27%	31%	25%	37%	34%	
Index	82	117		90	92	117	65	92	140		78	94	104	94	107	86	125	116	
Chi-square Test	X ² : -12 DF: 4 P-Value: 0.01898		-	X ² : -31 DF: 20 P-Value: 0.055407						-	X ² : -25 DF: 28 P-Value: 0.638421								-
Column Total	427	367	781	91	251	276	99	63	17	783	105	80	102	153	159	95	52	56	788
	55%	47%	100%	12%	32%	35%	13%	8%	2%	100%	13%	10%	13%	19%	20%	12%	7%	7%	100%

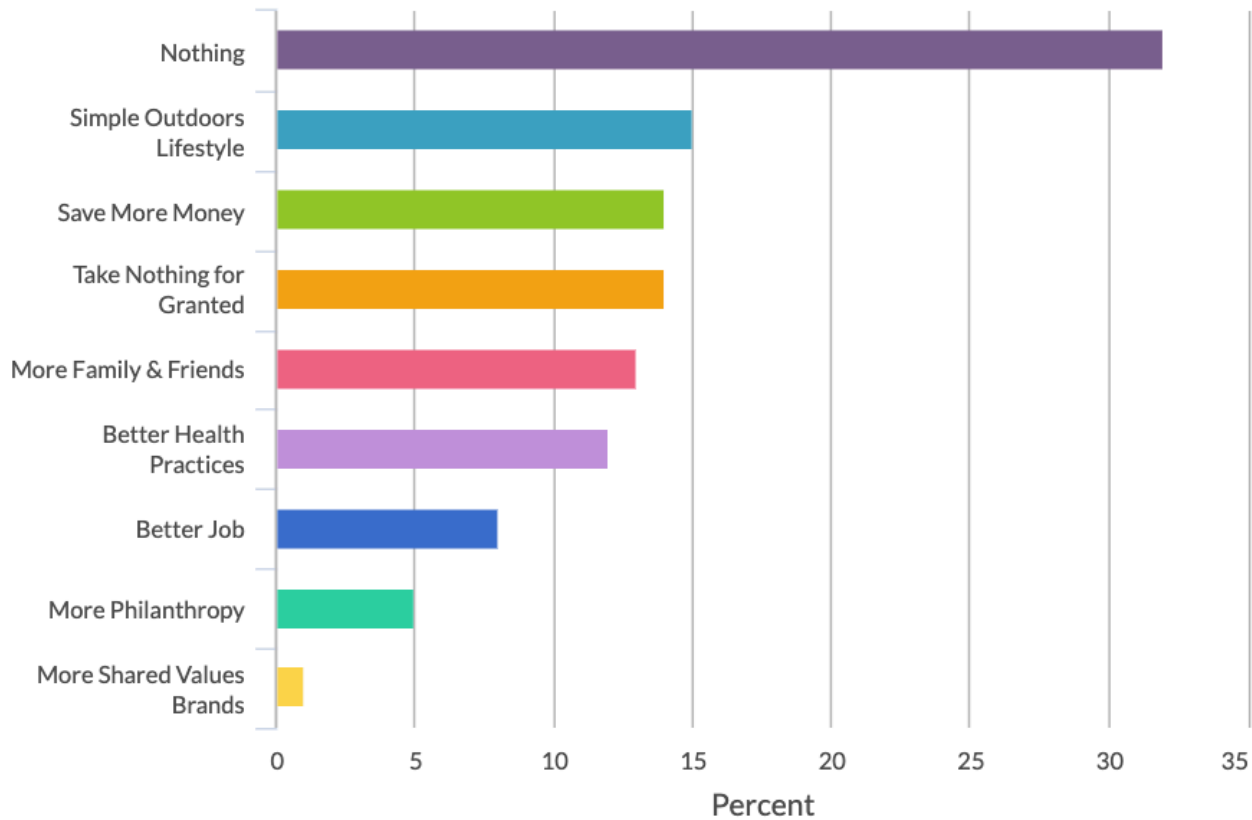
Life Changes

*When all this is over, what is the
one thing you plan to change in
your life?*

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Life Changes

When all this is over, what is the one thing you plan to change in your life?



Life Changes

When all this is over, what is the one thing you plan to change in your life?

The verbatims indicate these themes:

- **Nothing (32%):** No intention of changing
- **Simple Outdoors Lifestyle (15%):** Get outside more and simplify life
- **Save More Money (14%):** Prioritizing liquidity
- **Take Nothing for Granted (14%):** It can all be taken away easily
- **More Family & Friends (13%):** Spend more time with family & friends
- **Better Health Practices (12%):** Doing whatever it takes to be healthier and safer
- **Better Job (8%):** Find a better employment
- **More Philanthropy (5%):** Focus more on helping others
- **More Shared Values Brands (1%):** Prioritize spending on brands that share my values



IN THEIR OWN WORDS...

Slow down and smell the roses. I know that is an old adage but is very true. Slowing down allows us to see the important things in our life. These can often be forgotten about in pre virus state.

Appreciate my surroundings more

get my self outta debt and better situated with emergency fund

Not taking social gatherings interactions for granted. Personally I'm not much of a socialite, but even i miss the connection of random strangers

The thing I plan to change in my life is having more hope in humanity when hard times like this happen.

We need to be strong as a community and stick together following rules given to us. Or we wont succeed.

I already work from home because of my health. I am already deeply religious and believe strongly in ethical practices and donating generously to others.

nothing at all. I will continue on living during the pre-COVID-19 days.

I plan to go outside more, houses are very stuffy.

Nothing this is stupid

Life Changes

Implications

- If an organization intends to bring meaning to the people they serve, what better way than to help them find opportunities to bring about the life changes they want to see in themselves?

Recommendations

- Find out if, how and in what ways the people you serve want change their lives.
- Craft your offering, product or service to them in a way that will help them accomplish that.
- Speak to them in those terms.
- Consider treating Gen Z and 65+ similarly

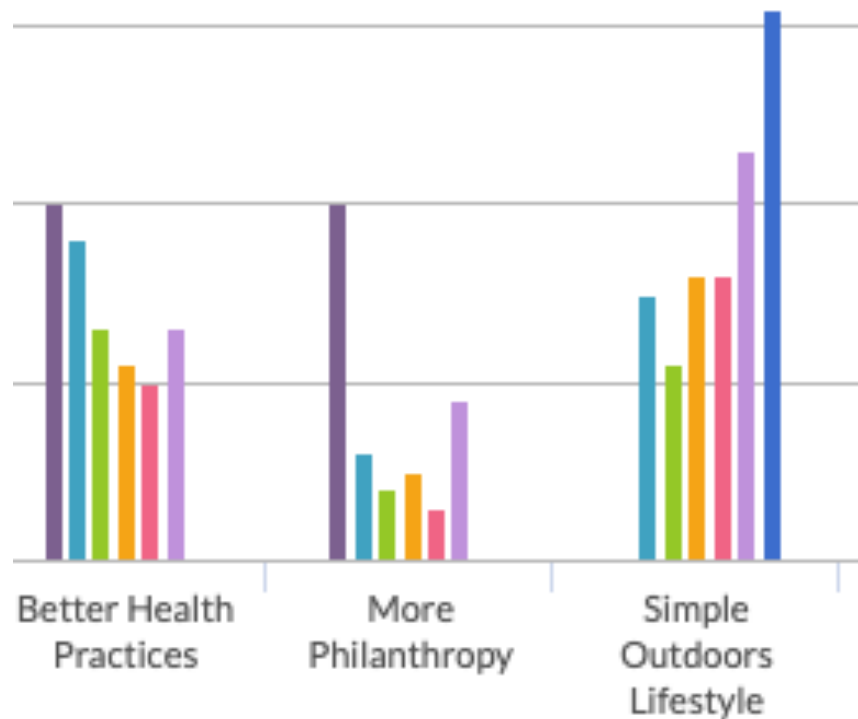
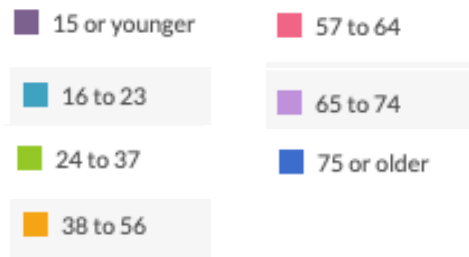
Related Facts

- Gen Z and Millennials are more interested in *Better Health Practices*
- Gen Z and 65-75 are interested in *More Philanthropy*
- *65-75 and 75+* are more interested in *Simple Outdoor Lifestyle*

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Life Changes

Demographic Details



Encouragement

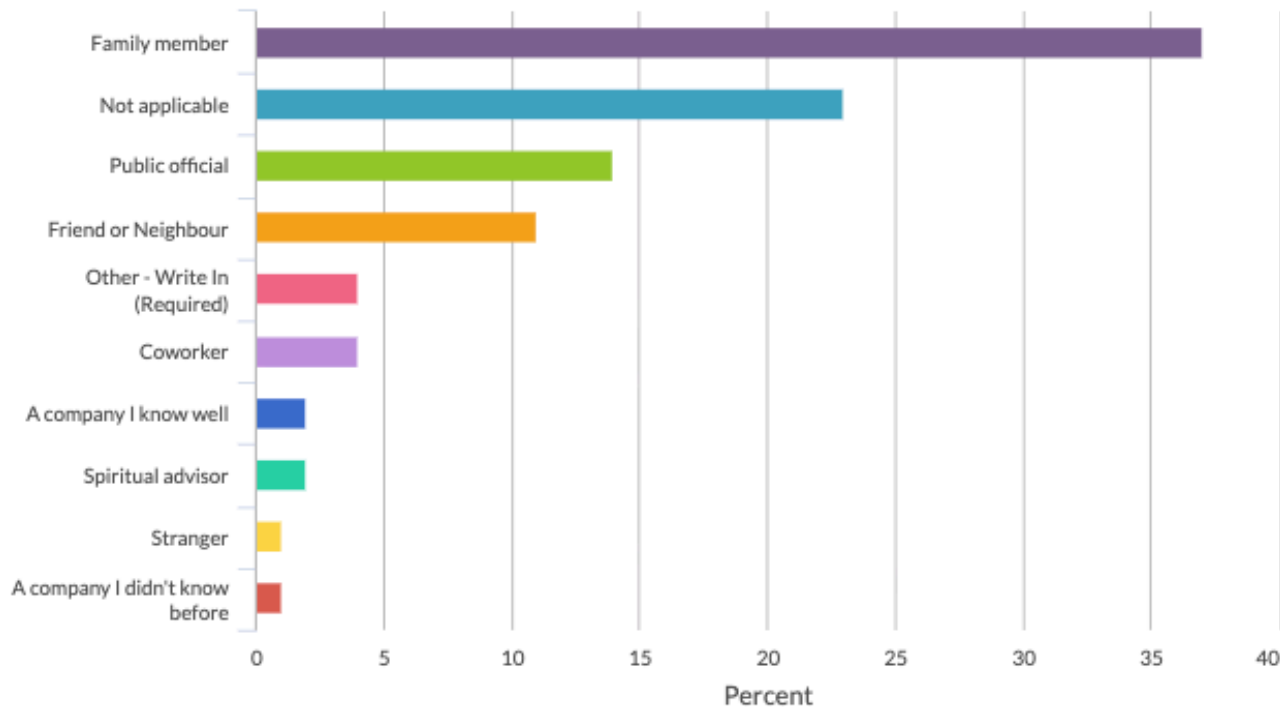
In this current crisis, what person or company, if any, has been the most encouraging to you?

Tell us the story of how they encouraged you.

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Encouragement

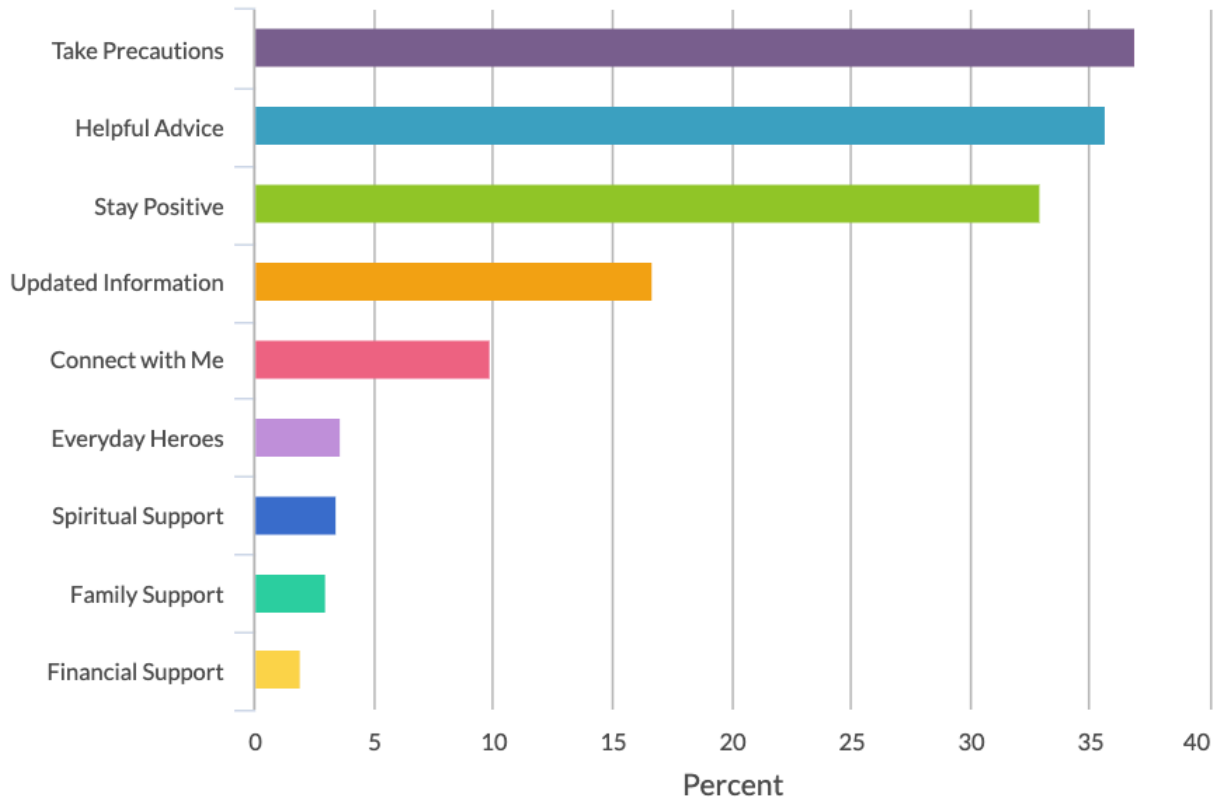
In this current crisis, what person or company, if any, has been the most encouraging to you?



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Encouragement

Tell us the story of how they encouraged you.



Encouragement

Tell us the story of how they encouraged you.

The verbatims indicate these themes:

1. **Take Precautions (37%):** Reminders to stay safe
2. **Helpful Advice (36%):** Practical steps to get through the challenges
3. **Stay Positive (33%):** Putting the best light on the situation
4. **Updated Information (17%):** Trustworthy, timely facts helped alleviate stress
5. **Connect with Me (10%):** The simple fact of reaching out
6. **Everyday Heroes (4%):** People who go above and beyond in the crisis time
7. **Spiritual Support (3%):** Reminders of transcendence
8. **Family Support (3%):** Connection from family
9. **Financial Support (2%):** Assurances of material well-being



IN THEIR OWN WORDS...

I think we have a very close family. We tend to build each other up and talk about the things we can do to protect ourselves rather than paint pictures of failure for each other. I think this allows us to see a positive outcome rather than dwell on the possible negatives. This is very encouraging especially as a diabetic paraplegic with an already compromised immune system.

The Chief health Officer is always calm and collected and puts things in a positive way where you want to do what she's requesting the public to do, for their own safety. Very impressive.

Encouragement

Implications

- If a brand wishes to offer encouragement, they will be wise to target both the substance and messaging as closely as possible to their audience with different psychographic triggers.

Recommendations

- The substance and messaging can leverage one or more of the encouragement types.
- For Over 65, consider the substance and messaging as if delivered by a trusted public official. (e.g. Alberta's Dr. Deena Hinshaw)
- For Women, Gen X and Boomers, consider openly leveraging your existing relationship with them.
- For Millennials and HHI <\$25k, consider leveraging social media and focus less on existing brand relationship.

Related Facts

- Encouragement from *Public Officials* increases with age, with Gen Z unlikely and Over 65 very likely to agree.
- Millennials are more likely to say *Coworker* and *Stranger*
- Women and Boomers are more likely to say *Companies I Know Well*

Demographic Details

	What was your sex at birth?		Row Total	What is your age?							Row Total	What is your household income?								Row Total
	Male	Female		16 to 23	24 to 37	38 to 56	57 to 64	65 to 74	75 or older	Less than \$25,000		\$25,000 to \$34,999	\$35,000 to \$49,999	\$50,000 to \$74,999	\$75,000 to \$99,999	\$100,000 to \$124,999	\$125,000 to \$149,999	\$150,000 or more		
In this current crisis, what person or company, if any, has been the most encouraging to you?																				
Coworker	15	17	32	3	17	8	3	1	0	32	3	3	2	8	8	4	2	2	32	
Frequency	47%	53%	6%	9%	53%	25%	9%	3%	0%	6%	9%	6%	25%	25%	13%	6%	6%	6%	6%	
Row %	4%	5%	3%	3%	7%	3%	3%	2%	0%	3%	3%	4%	5%	5%	4%	4%	4%	4%	4%	
Column %	63	83	59	59	122	52	55	29	0	52	52	68	36	95	91	76	70	65	65	
Family mem...	147	149	296	41	93	103	39	17	4	297	42	34	33	51	51	41	22	24	298	
Frequency	50%	50%	51%	14%	31%	35%	13%	6%	1%	51%	14%	11%	11%	17%	17%	14%	7%	8%	51%	
Row %	34%	41%	45%	37%	37%	39%	27%	24%	4%	40%	40%	43%	32%	33%	32%	43%	42%	43%	40%	
Column %	67	79	88	72	73	77	52	46	77	78	83	63	63	65	62	84	82	83	83	
Spiritual advi...	8	10	18	1	3	9	3	2	0	18	0	2	2	4	3	6	1	0	18	
Frequency	44%	56%	3%	6%	17%	50%	17%	11%	0%	3%	0%	11%	11%	22%	17%	33%	6%	0%	3%	
Row %	2%	3%	1%	1%	3%	3%	3%	0%	0%	0%	0%	2%	2%	3%	2%	6%	2%	0%	0%	
Column %	60	87	35	38	105	97	102	0	0	0	81	63	63	84	61	204	62	0	0	
Public official	69	41	110	7	32	38	14	14	5	110	8	8	15	19	28	13	10	9	110	
Frequency	63%	37%	19%	6%	29%	35%	13%	13%	5%	19%	7%	7%	14%	17%	25%	12%	9%	8%	19%	
Row %	16%	11%	8%	13%	14%	14%	22%	29%	12%	8%	10%	15%	18%	18%	18%	14%	19%	16%	16%	
Column %	85	58	40	67	72	74	117	154	117	40	53	78	78	65	93	72	101	85	85	
A company I ...	7	11	18	2	3	9	5	0	0	19	0	0	4	2	6	2	2	3	19	
Frequency	39%	61%	3%	11%	16%	47%	26%	0%	0%	3%	0%	0%	21%	11%	32%	11%	11%	16%	3%	
Row %	2%	3%	2%	1%	3%	5%	0%	0%	0%	0%	0%	0%	4%	1%	4%	2%	4%	5%	0%	
Column %	52	96	67	36	99	153	0	0	0	0	0	0	120	40	115	64	117	164	164	
A company I ...	4	4	8	1	3	3	0	0	0	7	1	1	2	0	1	1	0	2	8	
Frequency	50%	50%	1%	14%	43%	43%	0%	0%	0%	1%	13%	13%	25%	0%	13%	13%	0%	25%	1%	
Row %	1%	1%	1%	1%	1%	0%	0%	0%	0%	69	1%	1%	2%	0%	1%	1%	0%	4%	1%	
Column %	67	78	91	99	90	0	0	0	0	69	91	142	0	0	46	76	0	259	259	
Friend or Nei...	38	47	85	14	31	21	10	6	3	85	10	10	11	22	14	9	4	6	86	
Frequency	45%	55%	15%	16%	36%	25%	12%	7%	4%	15%	12%	12%	13%	26%	16%	10%	5%	7%	15%	
Row %	9%	13%	10%	15%	12%	8%	10%	10%	18%	64	84	73	97	59	64	52	8%	11%	15%	
Column %	60	87	104	84	52	69	65	120	120	64	84	73	97	59	64	52	8%	11%	15%	
Stranger	4	5	9	1	8	0	0	0	0	9	3	0	1	2	2	1	0	0	9	
Frequency	44%	56%	2%	11%	89%	0%	0%	0%	0%	2%	33%	0%	11%	22%	22%	11%	0%	0%	2%	
Row %	1%	1%	1%	1%	3%	0%	0%	0%	0%	3%	0%	1%	1%	1%	1%	0%	0%	0%	0%	
Column %	60	87	70	204	0	0	0	0	0	184	0	63	63	84	81	68	0	0	0	
Chi-square Test	χ ² : -9 DF: 7 P-Value: 0.229715		-	χ ² : -53 DF: 35 P-Value: 0.026294							-	χ ² : -47 DF: 49 P-Value: 0.542327								-
Column Total	427	367	576	91	251	276	99	63	17	577	105	80	102	153	159	95	52	56	580	
	74%	64%	100%	16%	44%	48%	17%	11%	3%	100%	18%	14%	18%	26%	27%	16%	9%	10%	100%	

a

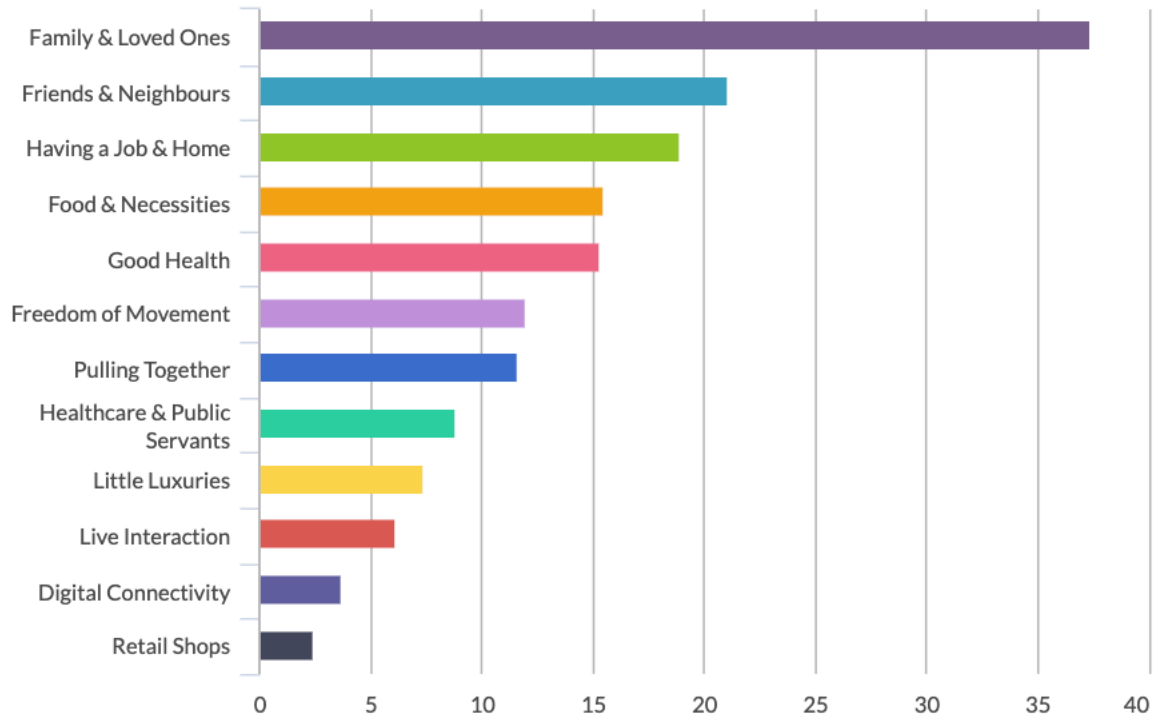
Appreciation

*In this current crisis, what do you
find yourself appreciating now
more than ever, if anything?*

a

Appreciation

In this current crisis, what do you find yourself appreciating now more than ever, if anything?



Appreciation

In this current crisis, what do you find yourself appreciating now more than ever, if anything?

The verbatims indicate people appreciated:

- 1. Family & Loved Ones (37%):** The main source of appreciation
- 2. Friends & Neighbours (21%):** A wide circle of connections
- 3. Having a Job & Home (19%):** Income and a place to live
- 4. Food & Necessities (16%):** The ability to feed oneself and look after basic needs
- 5. Good Health (15%):** Being virus-free, but also general health
- 6. Freedom of Movement (12%):** The ability to come and go as you please
- 7. Pulling Together (12%):** Seeing societal cohesions and mutual support
- 8. Healthcare & Public Servants (9%):** Essential services that support in crisis
- 9. Little Luxuries (7%):** The small non-necessary things that make life enjoyable
- 10. Live Interaction (6%):** Connecting in real life
- 11. Digital Connectivity (4%):** The ability to access people and services digitally
- 12. Retail Shops (2%):** Being able to go to businesses, shops and have retail experiences



IN THEIR OWN WORDS...

The healthcare system has had to take on many cases and testing for the virus that is making it harder to keep up with everything that's happening, but the system is pulling it together and doing everything they can to combat this pandemic. The government is also putting a lot of money towards making sure everyone in Canada is safe and will continue to be.

The development of online shopping, online education, online work, and online communications really help to keep people connected and keep society moving to a certain extent.

Additionally, I know myself (and I'd expect others) have a feeling of pride and gratitude for those who are working on the front-lines or those who are working in essential services. I think a lot of times we get caught up in plans - and although uncertainty can be scary it can also help us remember what is important to each of us.

Wanting to spend time with them, but also not wanting to put others at risk, especially the old and vulnerable, is very difficult. I would love to spend more time with my Grandmother, but don't want to put her at unnecessary risk.

Appreciation

Implications

- Respondents seem to be appreciating the basics of living; the aspects of modern life that they may have taken for granted.

Recommendations

- Based on what they currently appreciate at the outset of this crisis, the respondents will respond if you acknowledge the importance of the basics that we used to take for granted: Simplified living. Core priorities. The not-so-little aspects of modern life that we appreciate now more than ever.

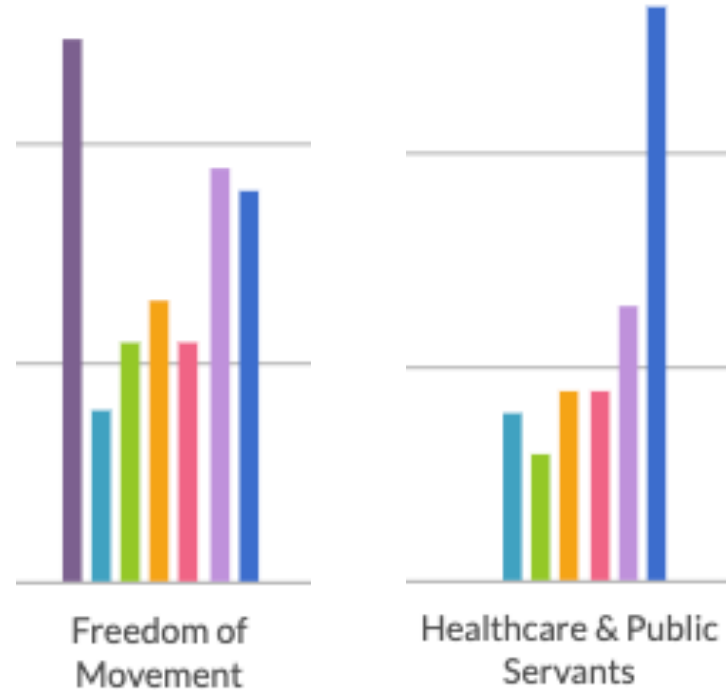
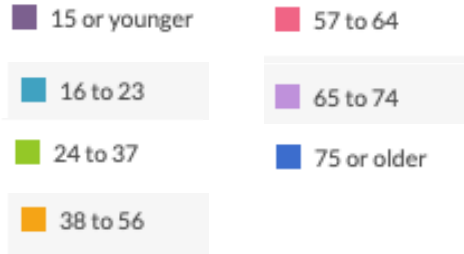
Related Facts

- Gen Z and Over 65 both appreciate *Freedom of Movement* more than other generations.
- 75+ appreciates Healthcare & Public Servants more than other generations.

a

Appreciation

Demographic Details



Spending Changes

After the crisis, will you think about spending your money differently?

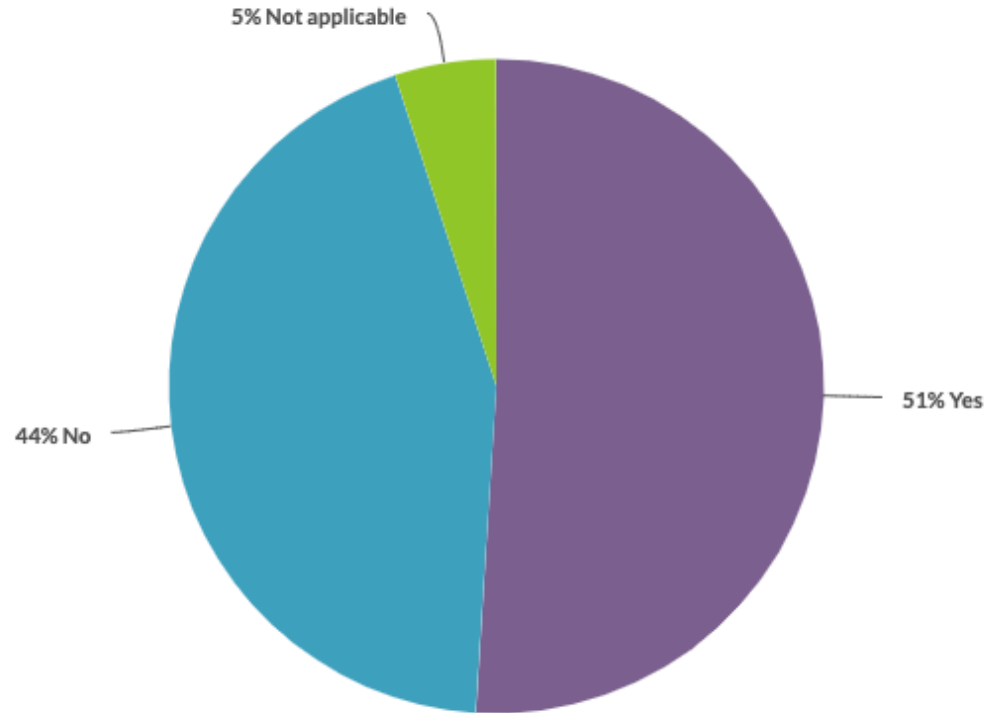
Why might you want to spend your money differently after the crisis is over?

After this is over, how might you spend your money differently? Rank them in order of priority.

a

Spending Changes

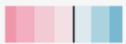

After the crisis, will you think about spending your money differently?




a

Spending Changes

After this is over, how might you spend your money differently? Rank them in order of priority.

Item	Overall Rank	Rank Distribution	Score
Higher quality products that last longer	1		2,087
More giving to organized charities	2		1,687
More generosity to random strangers	3		1,643
More owning things versus renting/leasing	4		1,641
More indulgent, fun things for myself	5		1,560
More investing in financial markets	6		1,517
More material goods	7		1,330

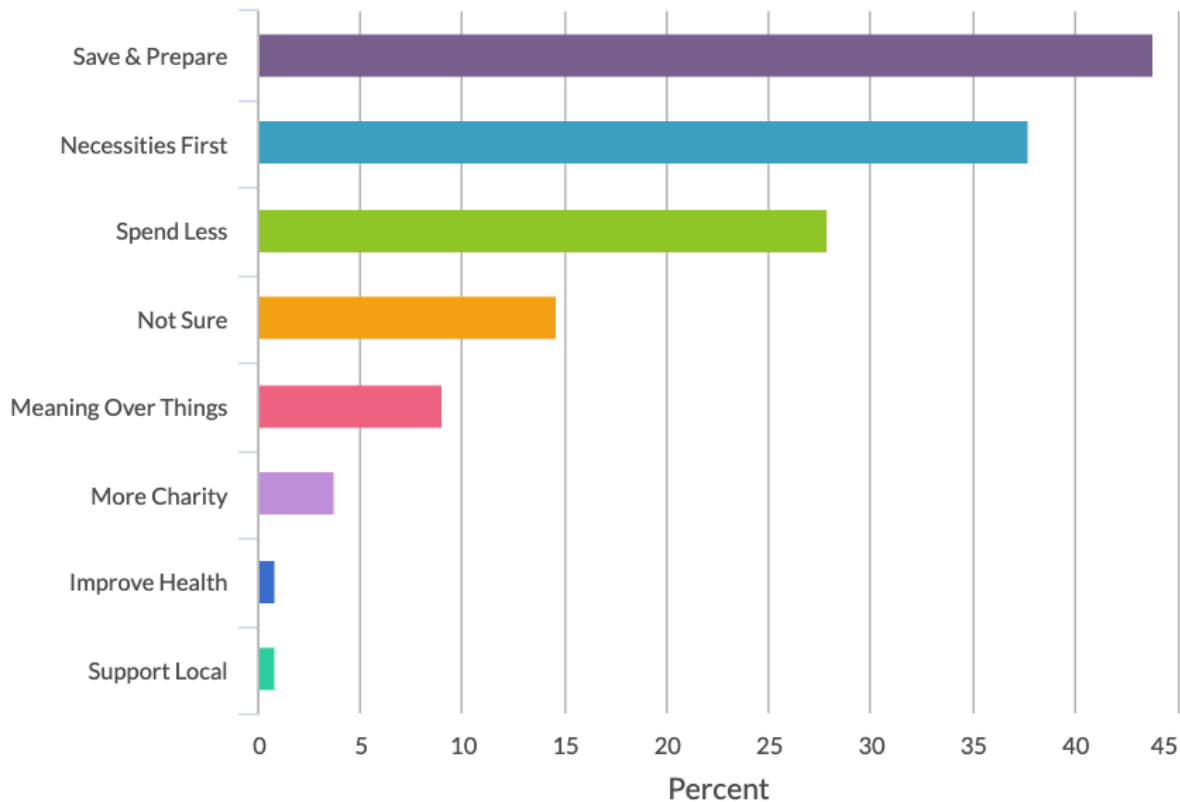


 Lowest Rank Highest Rank

a

Spending Changes

Why might you want to spend your money differently after the crisis is over?



Spending Changes

Why might you want to spend your money differently after the crisis is over?

The verbatims indicate these themes:

1. **Save & Prepare (44%):** Be better prepared with liquidity in case of more disruptions
2. **Necessities First (38%):** Prioritize the basics and keep it simple
3. **Spend Less (28%):** Simply spend less money
4. **Not Sure (15%):** Some respondents just are not sure yet how they will spend differently
5. **Meaning Over Things (9%):** Focus on whatever adds meaning more than buying things
6. **More Charity (4%):** More philanthropic activity
7. **Improve Health (1%):** Items/services that will help maintain and improve health
8. **Support Local (1%):** Wherever possible, support businesses with a local connection



IN THEIR OWN WORDS...

There are certain material objects that prior to this I may have desired but it's been highlighted that these little things really don't matter in life or death.

This crisis has exposed the vulnerability and helplessness of humans.

Property, money, etc., are not priorities, I've now learned. Human lives are more important.

I will value lives more than any other things. I'll learn to help others who are in need

I think it's just a new perspective on things I spend a lot on fun things so may be time to slow down and help others

Just realizing life is short and don't take anything for granted

This has been a real eye opener for me and my family as to what really matters in life. How good we have it. To share a little more who do not.

Spending Changes

Implications

- If these hold true after the crisis, this essentially turns indulgent consumer culture upside down. Less focus on self, more on goods that last, generosity and ownership.

Recommendations

- When focusing on bringing meaning to the lives of *Women, Younger people* and *higher HHI*, realize that they will be predisposed to changing how they have spent money in the past.
- When focusing on bringing meaning to the lives of *Men, Older people* and *lower HHI*, realize that they will be less interested in changing their spending habits, although 75+ are more likely to want to save, prepare and spend less.
- Couch offerings and messaging in terms of meaning that is related to fewer-things-more-quality, saving and preparing for great uncertainty in the future, generosity, and their innate desire to accumulate LESS than they might have beforehand.

Related Facts

- More likely to say *Yes*: Younger, Women, higher HHI
- More likely to say *No*: Older, Men, lower HHI
- 75+ are more likely to say *Save & Prepare* and *Spend Less*.

Demographic
Details

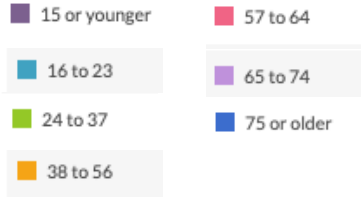
What was your sex at birth?		What is your age?								What is your household income?								
Male	Female	Row Total	16 to 23	24 to 37	38 to 56	57 to 64	65 to 74	75 or older	Row Total	Less than \$25,000	\$25,000 to \$34,999	\$35,000 to \$49,999	\$50,000 to \$74,999	\$75,000 to \$99,999	\$100,000 to \$124,999	\$125,000 to \$149,999	\$150,000 or more	Row Total

After the crisis, will you think about spending your money differently?

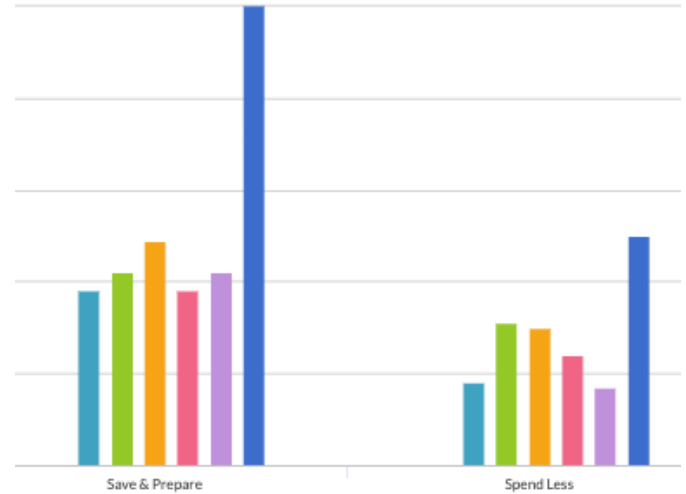
Yes																			
Frequency	205	205	410	63	147	152	32	15	2	411	55	35	47	73	83	54	30	35	412
Row %	50%	50%	54%	15%	36%	37%	8%	4%	0%	54%	13%	8%	11%	18%	20%	13%	7%	8%	54%
Column %	48%	56%		69%	59%	55%	32%	24%	12%		52%	44%	46%	48%	52%	57%	58%	63%	
Index	89	103		128	109	102	60	44	22		97	81	85	88	97	105	107	116	
No																			
Frequency	204	143	347	25	89	115	65	43	14	351	42	40	46	74	71	38	21	20	352
Row %	59%	41%	46%	7%	25%	33%	19%	12%	4%	46%	12%	11%	13%	21%	20%	11%	6%	6%	46%
Column %	48%	39%		27%	35%	42%	66%	68%	82%		40%	50%	45%	48%	45%	40%	40%	36%	
Index	104	85		60	77	90	143	148	179		87	109	98	105	97	87	88	78	
Chi-square Test	X ² : ~5 DF: 1 P-Value: 0.019046		-	X ² : ~65 DF: 5 P-Value: < 0.001						-	X ² : ~7 DF: 7 P-Value: 0.44786								-
Column Total	427	367	757	91	251	276	99	63	17	762	105	80	102	153	159	95	52	56	764
	56%	48%	100%	12%	33%	36%	13%	8%	2%	100%	14%	10%	13%	20%	21%	12%	7%	7%	100%

a

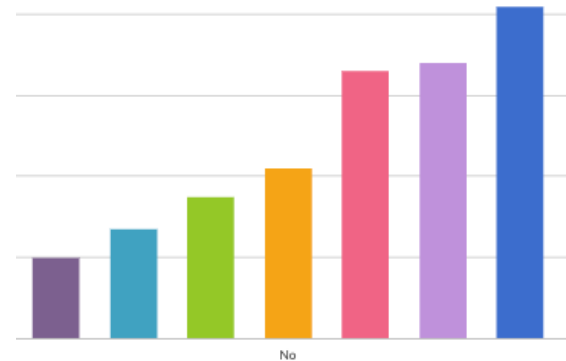
Demographic Details



Why might you want to spend your money differently after the crisis is over?



After the crisis, will you think about spending your money differently?



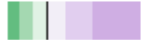

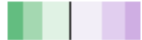



Brand Expectations


*Once this crisis is over,
please prioritize what you
will expect to see from
the brands you purchase.*

a

Brand Expectations

*Once this crisis is over,
please prioritize what you
will expect to see from
the brands you purchase.*

Item	Overall Rank	Rank Distribution	Score
Be compassionate to staff	1		3,476
Live their values beyond the product	2		3,033
Demonstrate a local connection	3		2,882
Help me live my own values	4		2,694
Provide easy online purchase	5		2,463
Connect with me individually	6		2,294



 Lowest Rank Highest Rank

Brand Expectations

Implications

- If this holds true, it will some traditional brand thinking on its head, which traditionally focuses on personalized connection and ease of purchase.
- Respondents place a much higher priority on values and expect to see them demonstrated by brands.
- For example, a brand that was *demonstrably, openly* compassionate to staff will be much more appreciated than one that connects with someone individually.

Recommendations

- Now and in the future, visibly and clearly demonstrate your commitment to the people in your company.
- Go beyond just openly living your own corporate values – bring new meaning to customers by helping them live their own values too.
- Make extra effort to leverage and openly demonstrate all local connections to each community in which you operate.
- Focus less on connecting with customers individually and prioritize the foregoing.

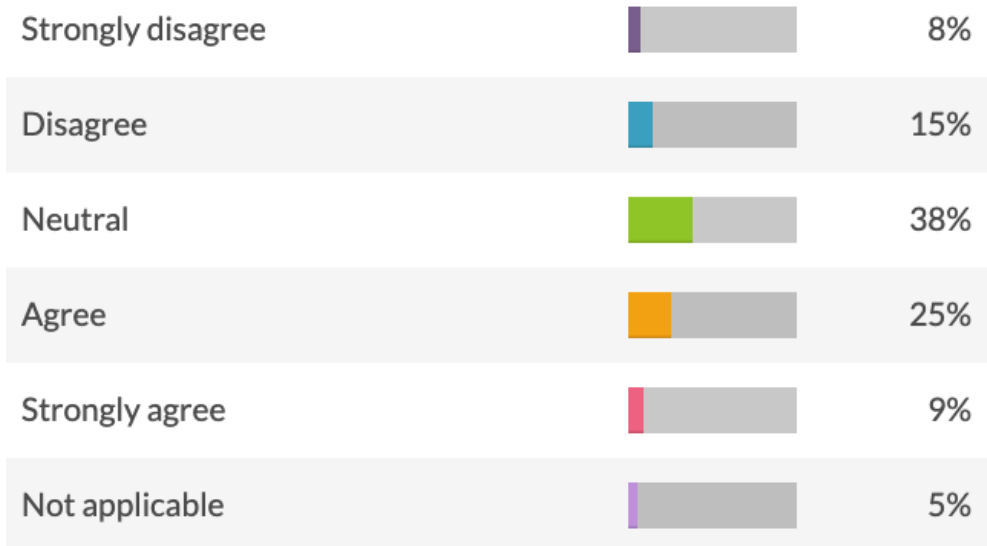
Word of Mouth

How much do you disagree or agree with this statement: "I am using personal connections and word of mouth more than before to find the products I need."

a

Word of Mouth

How much do you disagree or agree with this statement: "I am using personal connections and word of mouth more than before to find the products I need."



Word of Mouth

Implications

- As supply chains are disrupted and uncertainty around products increases, Women and those over 75 are more likely to find the product they need through personal connections.
- In the social media section below we will cover this as well, but this question did not probe into the mechanism people are using.

Recommendations

- Expect a dramatic increase in sales drivers from outside corporate strategies.
- The role of trusted friend and word of mouth seems to be stronger than before this crisis.
- For women referral marketing or promotions should be a consideration – benefiting the person recommending and person receiving the recommendation.
- Encouraging feedback from your customers and displaying it in a way that reaches other possible consumers will serve everyone involved. You can do this through social channels, displayed on your website, etc.

Related Facts

- Women are more likely to *Strongly Agree*.
- Gen Z are more likely to *Strongly Disagree*.
- Boomers are most likely to *Disagree*.
- 75+ are most likely to *Strongly Agree*.

Further Research: This question is strongly correlated to Age and may have predictive value (P-Value <0.001)



Demographic Details

	What was your sex at birth?		Row Total	What is your age?						Row Total	What is your household income?							Row Total	
	Male	Female		16 to 23	24 to 37	38 to 56	57 to 64	65 to 74	75 or older		Less than \$25,000	\$25,000 to \$34,999	\$35,000 to \$49,999	\$50,000 to \$74,999	\$75,000 to \$99,999	\$100,000 to \$124,999	\$125,000 to \$149,999		\$150,000 or more
How much do you disagree or agree with this statement: "I am using personal connections and word of mouth more than before to find the products I need."																			
Strongly disagree																			
Frequency	42	24	66	14	21	18	10	1	0	64	11	5	12	13	9	9	5	2	66
Row %	64%	36%	9%	22%	33%	28%	16%	2%	0%	8%	17%	8%	18%	20%	14%	14%	8%	3%	9%
Column %	10%	7%		15%	8%	7%	10%	2%	0%		10%	6%	12%	8%	6%	9%	10%	4%	
Index	112	75		181	99	77	119	19	0		121	72	135	98	65	109	111	41	
Disagree																			
Frequency	67	51	118	9	31	42	24	10	2	118	13	14	19	27	23	10	8	5	119
Row %	57%	43%	16%	8%	26%	36%	20%	8%	2%	16%	11%	12%	16%	23%	19%	8%	7%	4%	16%
Column %	16%	14%		10%	12%	15%	24%	16%	12%		12%	18%	19%	18%	14%	11%	15%	9%	
Index	100	89		63	79	97	155	102	75		79	112	119	113	92	67	98	57	
Neutral																			
Frequency	159	142	301	34	78	110	43	31	6	302	51	30	39	57	60	31	18	18	304
Row %	53%	47%	40%	11%	26%	36%	14%	10%	2%	40%	17%	10%	13%	19%	20%	10%	6%	6%	40%
Column %	37%	39%		37%	31%	40%	43%	49%	35%		49%	38%	38%	37%	38%	33%	35%	32%	
Index	93	97		93	78	100	109	123	88		121	94	96	93	94	82	87	80	
Agree																			
Frequency	110	89	199	24	83	64	13	12	5	201	20	13	23	33	44	34	12	22	201
Row %	55%	45%	26%	12%	41%	32%	6%	6%	2%	27%	10%	6%	11%	16%	22%	17%	6%	11%	26%
Column %	26%	24%		26%	33%	23%	13%	19%	29%		19%	16%	23%	22%	28%	36%	23%	39%	
Index	97	92		99	124	87	49	72	110		72	61	85	82	105	135	87	149	
Strongly agree																			
Frequency	32	37	69	8	24	32	4	2	0	70	7	12	5	16	12	8	6	4	70
Row %	46%	54%	9%	11%	34%	46%	6%	3%	0%	9%	10%	17%	7%	23%	17%	11%	9%	6%	9%
Column %	7%	10%		9%	10%	12%	4%	3%	0%		7%	15%	5%	10%	8%	8%	12%	7%	
Index	82	110		95	103	125	44	34	0		72	163	53	114	82	91	125	78	
Chi-square Test	X ² : -5 DF: 4 P-Value: 0.320297		-	X ² : -49 DF: 20 P-Value: < 0.001						-	X ² : -37 DF: 28 P-Value: 0.123514							-	
Column Total	427	367	753	91	251	276	99	63	17	755	105	80	102	153	159	95	52	56	760
	57%	49%	100%	12%	33%	37%	13%	8%	2%	100%	14%	11%	13%	20%	21%	13%	7%	7%	100%

Altruism

*How much do you disagree or agree with this statement:
"I feel more altruistic towards strangers now."*

a

Altruism

*How much do you disagree or agree with this statement:
"I feel more altruistic towards strangers now."*

Strongly disagree



5%

Disagree



8%

Neutral



45%

Agree



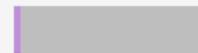
30%

Strongly agree



8%

Not applicable



3%

Altruism

Implications

- It will be difficult to find people feeling a stronger sense of altruism based on demographics alone. Psychographic segmentation (i.e. thoughts, feelings and behaviours) will be more effective.
- It will be interesting to see how this evolves over time as the crisis unfolds.

Recommendations

- When creating strategy around living one's organizational values, as well as helping customers live out theirs, be mindful of the fact that altruism towards strangers is an important part of the consideration set right now.

Related Facts

- Men are more likely to *Strongly Disagree*.
- Gen Z are conflicted, and more likely to both *Strongly/Disagree* and *Strongly Agree*.
- Millennials are more likely to *Strongly Agree*.
- Boomers are more likely to *Strongly Disagree*.
- 75+ are more likely to *Agree*.
- <\$25k are more likely to *Strongly/Disagree*.
- HHI \$50k-\$75k are more likely to *Strongly Disagree*.
- HHI \$100k-\$125 are more likely to *Strongly/Agree*.
- HHI \$150k+ are more likely to *Strongly/Agree and Strongly/Disagree*.

Further Research: This question is very close to being correlated to HHI and may have predictive value (P-Value: <0.011)

a

Demographic Details

	What was your sex at birth?		Row Total	What is your age?						Row Total	What is your household income?								Row Total
	Male	Female		16 to 23	24 to 37	38 to 56	57 to 64	65 to 74	75 or older		Less than \$25,000	\$25,000 to \$34,999	\$35,000 to \$49,999	\$50,000 to \$74,999	\$75,000 to \$99,999	\$100,000 to \$124,999	\$125,000 to \$149,999	\$150,000 or more	
How much do you disagree or agree with this statement: "I feel more altruistic towards strangers now."																			
Strongly disagree	29	9	38	5	11	11	9	1	0	37	7	2	6	10	4	4	2	4	39
Frequency	29	9	38	5	11	11	9	1	0	37	7	2	6	10	4	4	2	4	39
Row %	76%	24%	5%	14%	30%	30%	24%	3%	0%	5%	18%	5%	15%	26%	10%	10%	5%	10%	5%
Column %	7%	2%	5%	4%	4%	9%	2%	0%	7%	3%	6%	7%	3%	4%	4%	7%	4%	7%	5%
Index	137	50	114	91	83	189	33	0	132	50	117	130	50	84	76	142	142	142	39
Disagree	36	29	65	12	23	27	5	1	0	68	13	4	5	9	16	9	3	9	68
Frequency	36	29	65	12	23	27	5	1	0	68	13	4	5	9	16	9	3	9	68
Row %	55%	45%	8%	18%	34%	40%	7%	1%	0%	9%	19%	6%	7%	13%	24%	13%	4%	13%	9%
Column %	8%	8%	13%	9%	10%	5%	2%	0%	12%	5%	5%	6%	10%	9%	6%	6%	16%	16%	9%
Index	100	93	149	104	111	57	18	0	141	57	56	67	115	108	66	183	183	183	68
Neutral	194	170	364	37	111	118	48	42	6	362	48	41	61	69	78	31	21	15	364
Frequency	194	170	364	37	111	118	48	42	6	362	48	41	61	69	78	31	21	15	364
Row %	53%	47%	47%	10%	31%	33%	13%	12%	2%	47%	13%	11%	17%	19%	21%	9%	6%	4%	47%
Column %	45%	46%	41%	44%	43%	48%	67%	35%	46%	51%	60%	45%	49%	33%	40%	27%	27%	27%	47%
Index	96	98	86	94	91	103	142	75	97	109	127	96	104	69	86	57	57	57	362
Agree	120	115	235	25	71	89	27	16	8	236	22	22	19	50	49	38	17	20	237
Frequency	120	115	235	25	71	89	27	16	8	236	22	22	19	50	49	38	17	20	237
Row %	51%	49%	31%	11%	30%	38%	11%	7%	3%	31%	9%	9%	8%	21%	21%	16%	7%	8%	31%
Column %	28%	31%	27%	28%	32%	27%	25%	47%	21%	28%	19%	33%	31%	40%	33%	36%	36%	36%	31%
Index	92	103	90	92	105	89	83	154	69	90	61	107	101	131	107	117	117	117	237
Strongly agree	37	30	67	10	26	24	6	1	0	67	9	7	10	9	8	10	7	7	67
Frequency	37	30	67	10	26	24	6	1	0	67	9	7	10	9	8	10	7	7	67
Row %	55%	45%	9%	15%	39%	36%	9%	1%	0%	9%	13%	10%	15%	13%	12%	15%	10%	10%	9%
Column %	9%	8%	11%	10%	9%	6%	2%	0%	9%	9%	9%	10%	6%	5%	11%	13%	13%	13%	9%
Index	99	94	126	119	100	70	18	0	99	101	113	68	58	122	156	145	145	145	67
Chi-square Test	$\chi^2: .-9$ DF: 4 P-Value: 0.072008		-	$\chi^2: .-35$ DF: 20 P-Value: 0.019727						-	$\chi^2: .-48$ DF: 28 P-Value: 0.011079								-
Column Total	427	367	769	91	251	276	99	63	17	770	105	80	102	153	159	95	52	56	775
	56%	48%	100%	12%	33%	36%	13%	8%	2%	100%	14%	10%	13%	20%	21%	12%	7%	7%	100%

a

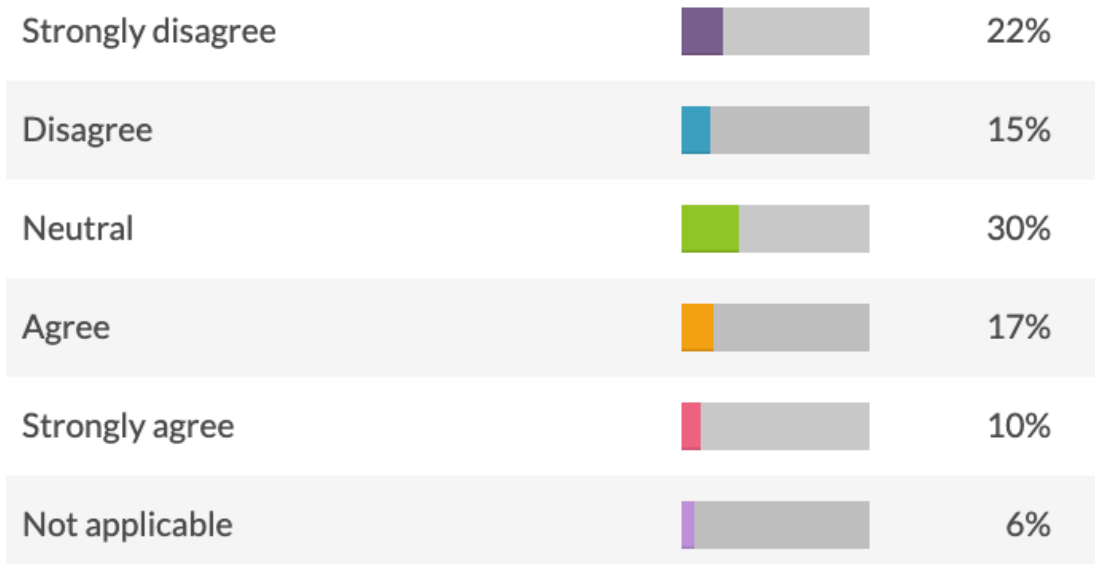
Faith

*How much do you disagree
or agree with this statement:
"I have a renewed sense of
religious faith."*

a

Faith

*How much do you disagree or agree with this statement:
"I have a renewed sense of religious faith."*



Faith

Implications

- We cannot ignore the fact that in difficult times people can renew their religious faith.
- Gen Z continue their consistently quality of being more traditional than the immediately preceding generations.

Recommendations

- Depending on your organization's brand and mandate, at least be respectful of religious sensibilities.

Related Facts

- Men are more likely to *Disagree*.
- Age is a correlated factor, as one would expect:
 - Gen Z are more likely to *Strongly Agree*
 - Millennials are more likely to both *Agree* and *Strongly Disagree*
 - Boomers & 65-75 are less likely to *Strongly/Agree*
 - 75+ are more likely to *Agree*
 - Gen Z are more likely to *Agree*
- <\$25k are more likely to *Strongly Agree*
- \$35k-\$50k are more likely to *Disagree*
- \$75k-\$100k are more likely to *Disagree*
- \$100k-\$125k are more likely to *Strongly/Agree*
- \$125k+ are generally more likely to *Strongly/Disagree*

Further Research: This question is correlated to Age and may have predictive value (P-Value: <0.01).

a

Demographic Details

	What was your sex at birth?		Row Total	What is your age?						Row Total	What is your household income?								Row Total
	Male	Female		16 to 23	24 to 37	38 to 56	57 to 64	65 to 74	75 or older		Less than \$25,000	\$25,000 to \$34,999	\$35,000 to \$49,999	\$50,000 to \$74,999	\$75,000 to \$99,999	\$100,000 to \$124,999	\$125,000 to \$149,999	\$150,000 or more	
How much do you disagree or agree with this statement: "I have a renewed sense of religious faith."																			
Strongly disagree																			
Frequency	109	65	174	18	67	62	16	7	3	173	21	14	29	32	32	22	17	10	177
Row %	62.6%	37.4%	23.3%	10.4%	38.7%	35.8%	9.2%	4.0%	1.7%	23.2%	11.9%	7.9%	16.4%	18.1%	18.1%	12.4%	9.6%	5.6%	23.5%
Column %	25.5%	17.7%		19.8%	26.7%	22.5%	16.2%	11.1%	17.6%		20.0%	17.5%	28.4%	20.9%	20.1%	23.2%	32.7%	17.9%	
Index	109	76		85	115	97	70	48	76		85	74	121	89	86	98	139	76	
Disagree																			
Frequency	62	60	122	12	38	45	19	6	1	121	11	8	18	20	33	11	8	13	122
Row %	50.8%	49.2%	16.4%	9.9%	31.4%	37.2%	15.7%	5.0%	0.8%	16.2%	9.0%	6.6%	14.8%	16.4%	27.0%	9.0%	6.6%	10.7%	16.2%
Column %	14.5%	16.3%		13.2%	15.1%	16.3%	19.2%	9.5%	5.9%		10.5%	10.0%	17.6%	13.1%	20.8%	11.6%	15.4%	23.2%	
Index	89	100		81	93	101	118	59	36		65	62	109	81	128	71	95	143	
Neutral																			
Frequency	120	116	236	28	62	81	34	30	2	237	30	28	30	49	45	29	11	15	237
Row %	50.8%	49.2%	31.6%	11.8%	26.2%	34.2%	14.3%	12.7%	0.8%	31.7%	12.7%	11.8%	12.7%	20.7%	19.0%	12.2%	4.6%	6.3%	31.5%
Column %	28.1%	31.6%		30.8%	24.7%	29.3%	34.3%	47.6%	11.8%		28.6%	35.0%	29.4%	32.0%	28.3%	30.5%	21.2%	26.8%	
Index	89	100		97	78	93	108	150	37		91	111	93	102	90	97	67	85	
Agree																			
Frequency	73	60	133	17	52	35	16	10	5	135	17	12	13	30	28	18	7	10	135
Row %	54.9%	45.1%	17.8%	12.6%	38.5%	25.9%	11.9%	7.4%	3.7%	18.1%	12.6%	8.9%	9.6%	22.2%	20.7%	13.3%	5.2%	7.4%	18.0%
Column %	17.1%	16.3%		18.7%	20.7%	12.7%	16.2%	15.9%	29.4%		16.2%	15.0%	12.7%	19.6%	17.6%	18.9%	13.5%	17.9%	
Index	96	92		103	115	70	89	88	163		90	84	71	109	98	106	75	99	
Strongly agree																			
Frequency	44	37	81	15	22	32	7	3	2	81	19	7	8	15	13	12	4	3	81
Row %	54.3%	45.7%	10.9%	18.5%	27.2%	39.5%	8.6%	3.7%	2.5%	10.8%	23.5%	8.6%	9.9%	18.5%	16.0%	14.8%	4.9%	3.7%	10.8%
Column %	10.3%	10.1%		16.5%	8.8%	11.6%	7.1%	4.8%	11.8%		18.1%	8.8%	7.8%	9.8%	8.2%	12.6%	7.7%	5.4%	
Index	95	93		152	81	107	65	44	108		168	81	73	91	76	117	71	50	
Chi-square Test	X ² : -6.6 DF: 4 P-Value: 0.159066		-	X ² : -37.7 DF: 20 P-Value: < 0.01						-	X ² : -31.4 DF: 28 P-Value: 0.29867								-
Column Total	427	367	746	91	251	276	99	63	17	747	105	80	102	153	159	95	52	56	752
	57.2%	49.2%	100%	12.2%	33.6%	36.9%	13.3%	8.4%	2.3%	100%	14.0%	10.6%	13.6%	20.3%	21.1%	12.6%	6.9%	7.4%	100%

a

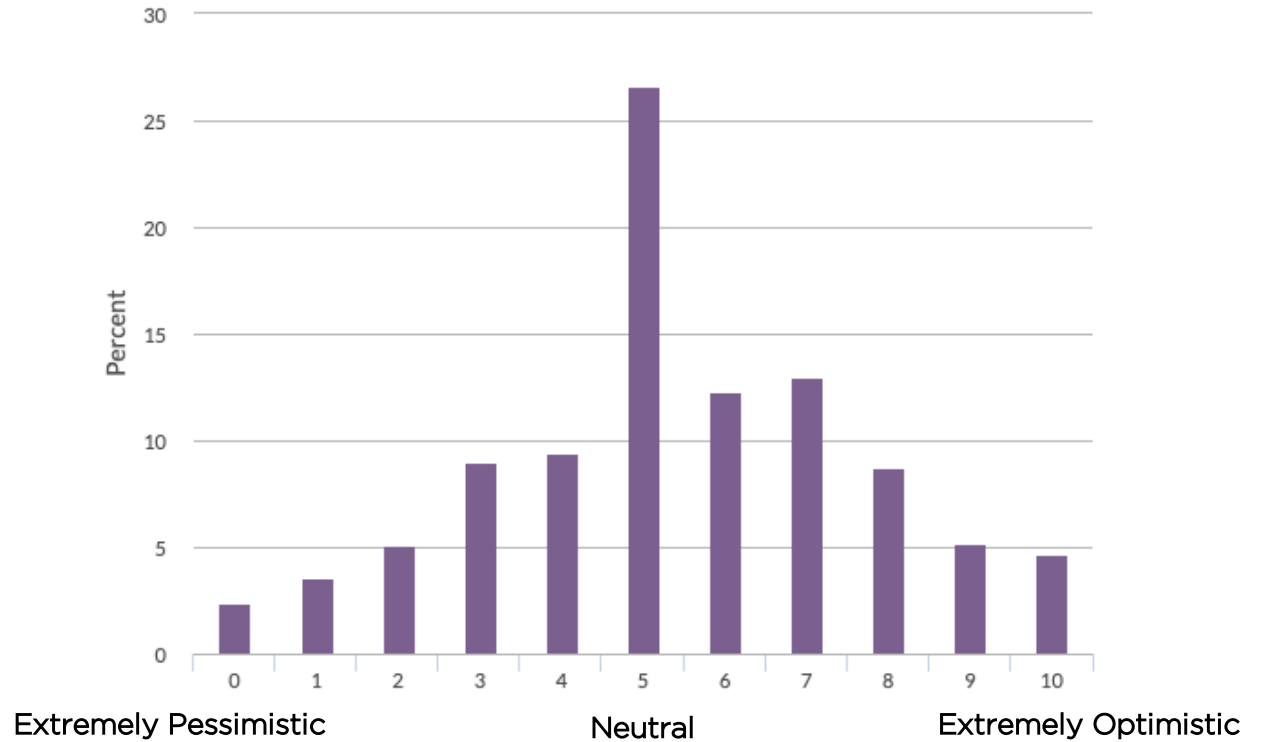
Optimism

*What is your level of
pessimism or optimism
about the next year?*

a

Optimism

What is your level of pessimism or optimism about the next year?



Optimism

Related Facts

- About 25% of respondents have a neutral outlook about the next year.
- The remaining respondents are fairly evenly-distributed between pessimistic and optimistic, with a slight edge towards optimism.

Implications

- Most people are in a wait-and-see mode right now, with a cautiously skeptical mindset.

Recommendations

- For the optimists, give them reasons to continue.
- For the neutrals, give them reasons to not give up.
- For the pessimists, speak to their hearts more than their minds.

Work from Home

Have you worked from home during this crisis?

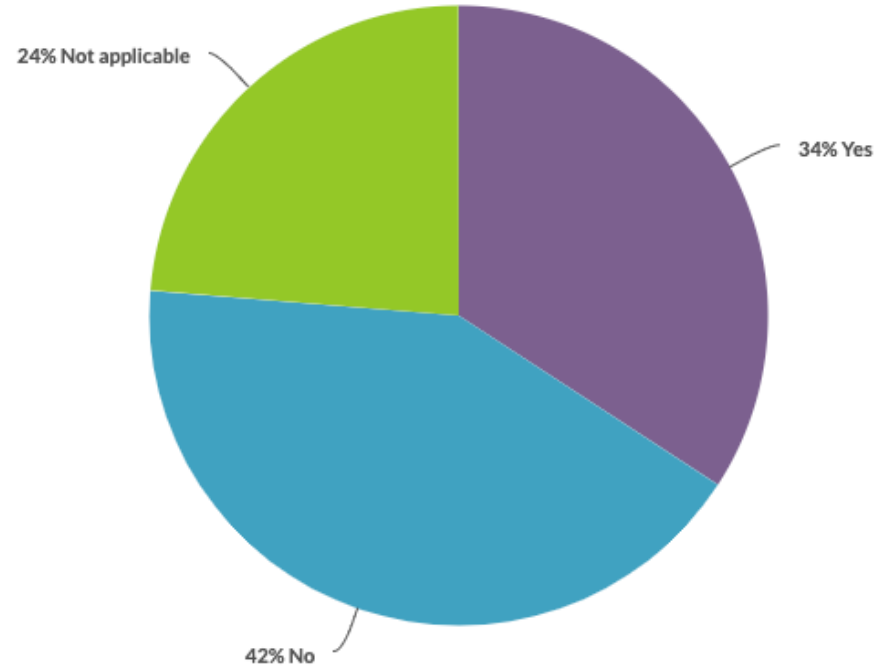
How much do you disagree or agree with this statement: "After this crisis, I would like to work from home more often."

Please rank what you have found to be the more challenging aspects of working from home.

a

Work from Home

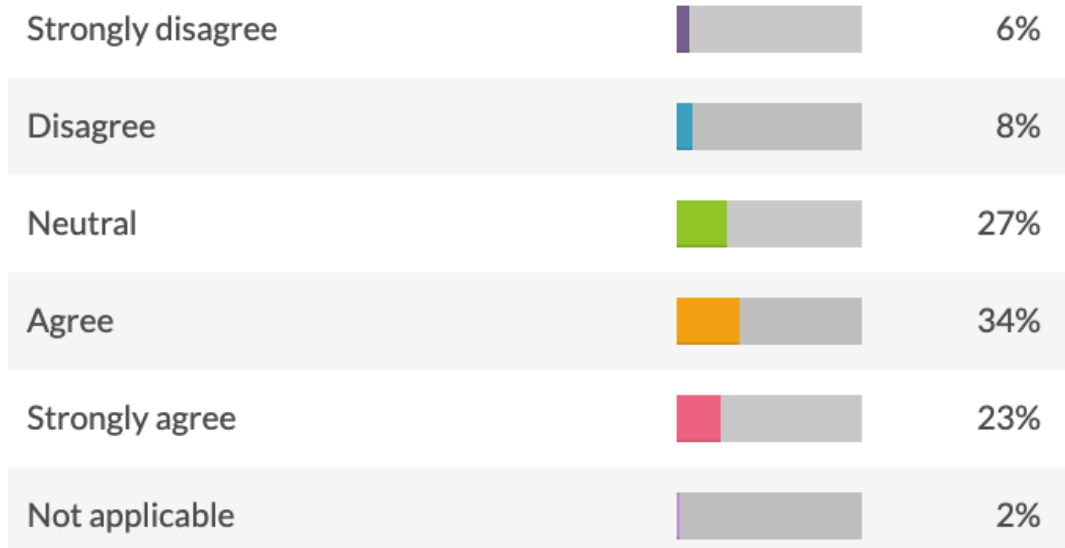
Have you worked from home during this crisis?



a

Work from Home


*How much do you disagree or agree with this statement:
"After this crisis, I would like to work from home more often."*




a

Work from Home

Please rank what you have found to be the more challenging aspects of working from home.

Item	Overall Rank	Rank Distribution	Score	No. of Rankings
Missing daily human contact	1		1,345	274
Difficulty coordinating task items with coworkers	2		1,226	274
Hard time keeping myself motivated	3		1,221	274
Challenges collaborating and brainstorming	4		1,134	274
Reasons to get dressed and be presentable	5		1,039	274
Access to files and documents	6		868	274
Video conference technical challenges	7		818	274


 Lowest Rank Highest Rank

Work from Home

Implications

- The main implications lie in the challenges that respondents face when working from home. They have little to do with the technology, and everything to do with the human contact on which people rely to do their work and to thrive. This includes just the simple fact of having contact, as well as being able to collaborate on project details and co-creative activities.

Recommendations

- For organizations involved with, or serving, those who have remote workers, it is critical that they address the importance of daily human contact as a challenge, separate and above the function challenges of distance cooperation and team dynamics.

This question is strongly correlated to HHI and may have predictive value (P-Value: <0.001)

Work from Home

Related Facts (Have Worked from Home)

- Millennials and Gen X are more likely to answer *Yes* than other age groups.
- \$100k to \$150k+ are all more likely to say *Yes*.
- Under \$100k are least likely to say *Yes*.
- Jobs more likely to say *Yes*: Accounting, Architecture, Buying, Consulting, Education, Management, Real Estate, Sales, Science/Technology/Programming,
- Jobs more likely to say *No*: Construction, Healthcare, Restaurant.

Further Research: This question is strongly correlated to HHI and may have predictive value (P-Value: <0.001)

Work from Home

Related Facts (Want to Do So After Crisis)

- Men are more likely to *Strongly Disagree* and *Agree* (bimodal).
- Women are more likely to be *Neutral* or *Strongly Agree*.
- Gen Z are more likely to *Strongly Disagree*.
- Millennials & Boomers are more likely to *Strongly Agree*.
- 65-75 are more likely to *Disagree*.

HHI

- <\$35k are more likely to *Strongly/Disagree* or be *Neutral*.
- \$75k-\$150k are more likely to *Strongly/Disagree* or be *Neutral*.
- \$125k+: Some are more likely to *Agree*, but:
 - \$125k-\$150k more likely to *Disagree*

Job

- More likely to say *Strongly/Agree*: Arts/Entertainment, Buying, Healthcare, Science/Tech/Programming, Social Service, Homemaker.
- More likely to say *Strongly/Disagree*: Accounting, Admin, Architecture, Consulting, Education, Science/Tech/Programming, Social Service, Unemployed.

Demographic
Details

What was your sex at birth?		What is your age?								What is your household income?								
Male	Female	Row Total	16 to 23	24 to 37	38 to 56	57 to 64	65 to 74	75 or older	Row Total	Less than \$25,000	\$25,000 to \$34,999	\$35,000 to \$49,999	\$50,000 to \$74,999	\$75,000 to \$99,999	\$100,000 to \$124,999	\$125,000 to \$149,999	\$150,000 or more	Row Total

Have you worked from home during this crisis?

Yes																				
Frequency	156	114	270	32	97	111	23	7	2	272	20	21	23	46	56	45	31	32	274	
Row %	57.8%	42.2%	44.5%	11.8%	35.7%	40.8%	8.5%	2.6%	0.7%	44.7%	7.3%	7.7%	8.4%	16.8%	20.4%	16.4%	11.3%	11.7%	44.8%	
Column %	36.5%	31.1%		35.2%	38.6%	40.2%	23.2%	11.1%	11.8%		19.0%	26.3%	22.5%	30.1%	35.2%	47.4%	59.6%	57.1%		
Index	82	70		79	86	90	52	25	26		43	59	50	67	79	106	133	128		
No																				
Frequency	179	158	337	42	119	119	38	16	2	336	45	34	46	74	71	32	17	19	338	
Row %	53.1%	46.9%	55.5%	12.5%	35.4%	35.4%	11.3%	4.8%	0.6%	55.3%	13.3%	10.1%	13.6%	21.9%	21.0%	9.5%	5.0%	5.6%		
Column %	41.9%	43.1%		46.2%	47.4%	43.1%	38.4%	25.4%	11.8%		42.9%	42.5%	45.1%	48.4%	44.7%	33.7%	32.7%	33.9%		
Index	76	78		84	86	78	69	46	21		78	77	82	88	81	61	59	61		
Chi-square Test	X ² : ~1.1 DF: 1 P-Value: 0.286574		-	X ² : ~4.4 DF: 5 P-Value: 0.494402						-	X ² : ~31.9 DF: 7 P-Value: < 0.001									-
Column Total	427	367	607	91	251	276	99	63	17	608	105	80	102	153	159	95	52	56	612	
	70.3%	60.5%	100%	15.0%	41.3%	45.4%	16.3%	10.4%	2.8%	100%	17.2%	13.1%	16.7%	25.0%	26.0%	15.5%	8.5%	9.2%	100%	

a

Demographic Details

	What was your sex at birth?		Row Total	What is your age?						Row Total	What is your household income?								Row Total
	Male	Female		16 to 23	24 to 37	38 to 56	57 to 64	65 to 74	75 or older		Less than \$25,000	\$25,000 to \$34,999	\$35,000 to \$49,999	\$50,000 to \$74,999	\$75,000 to \$99,999	\$100,000 to \$124,999	\$125,000 to \$149,999	\$150,000 or more	
How much do you disagree or agree with this statement: "After this crisis, I would like to work from home more often."																			
Strongly disagree																			
Frequency	11	5	16	5	3	5	1	0	0	14	2	2	1	2	4	2	1	2	16
Row %	69%	31%	6%	36%	21%	36%	7%	0%	0%	5%	13%	13%	6%	13%	25%	13%	6%	13%	6%
Column %	7%	4%		16%	3%	5%	4%	0%	0%		10%	10%	4%	4%	7%	4%	3%	6%	
Index	117	73		298	59	86	83	0	0		168	160	73	73	120	75	54	105	
Disagree																			
Frequency	13	9	22	2	9	10	1	1	0	23	2	0	2	4	4	5	4	2	23
Row %	59%	41%	8%	9%	39%	43%	4%	4%	0%	9%	9%	0%	9%	17%	17%	22%	17%	9%	9%
Column %	8%	8%		6%	9%	9%	4%	14%	0%		10%	0%	9%	9%	7%	11%	13%	6%	
Index	100	95		73	108	105	50	166	0		117	0	102	102	84	130	151	73	
Neutral																			
Frequency	36	35	71	8	24	34	4	4	0	74	6	9	6	10	12	15	8	8	74
Row %	51%	49%	27%	11%	32%	46%	5%	5%	0%	28%	8%	12%	8%	14%	16%	20%	11%	11%	28%
Column %	23%	31%		25%	25%	31%	17%	57%	0%		30%	43%	26%	22%	21%	33%	26%	25%	
Index	86	115		90	89	111	63	206	0		109	156	95	79	78	121	94	91	
Agree																			
Frequency	60	33	93	12	33	36	9	1	2	93	3	5	7	15	21	15	13	14	93
Row %	65%	35%	35%	13%	35%	39%	10%	1%	2%	35%	3%	5%	8%	16%	23%	16%	14%	15%	35%
Column %	38%	29%		38%	34%	32%	39%	14%	100%		15%	24%	30%	33%	38%	33%	42%	44%	
Index	110	82		108	98	93	112	41	287		43	69	88	94	108	96	121	127	
Strongly agree																			
Frequency	34	29	63	5	25	25	7	1	0	63	5	5	6	15	14	7	5	6	63
Row %	54%	46%	24%	8%	40%	40%	11%	2%	0%	24%	8%	8%	10%	24%	22%	11%	8%	10%	23%
Column %	22%	25%		16%	26%	23%	30%	14%	0%		25%	24%	26%	33%	25%	16%	16%	19%	
Index	92	107		66	109	95	129	61	0		107	102	111	139	107	66	69	80	
Chi-square Test	X ² : -4 DF: 4 P-Value: 0.358924		-	X ² : -20 DF: 20 P-Value: 0.484627						-	X ² : -18 DF: 28 P-Value: 0.934779								-
Column Total	156	114	265	32	97	111	23	7	2	267	20	21	23	46	56	45	31	32	269
	59%	43%	100%	12%	36%	42%	9%	3%	1%	100%	7%	8%	9%	17%	21%	17%	12%	12%	100%

Social Media

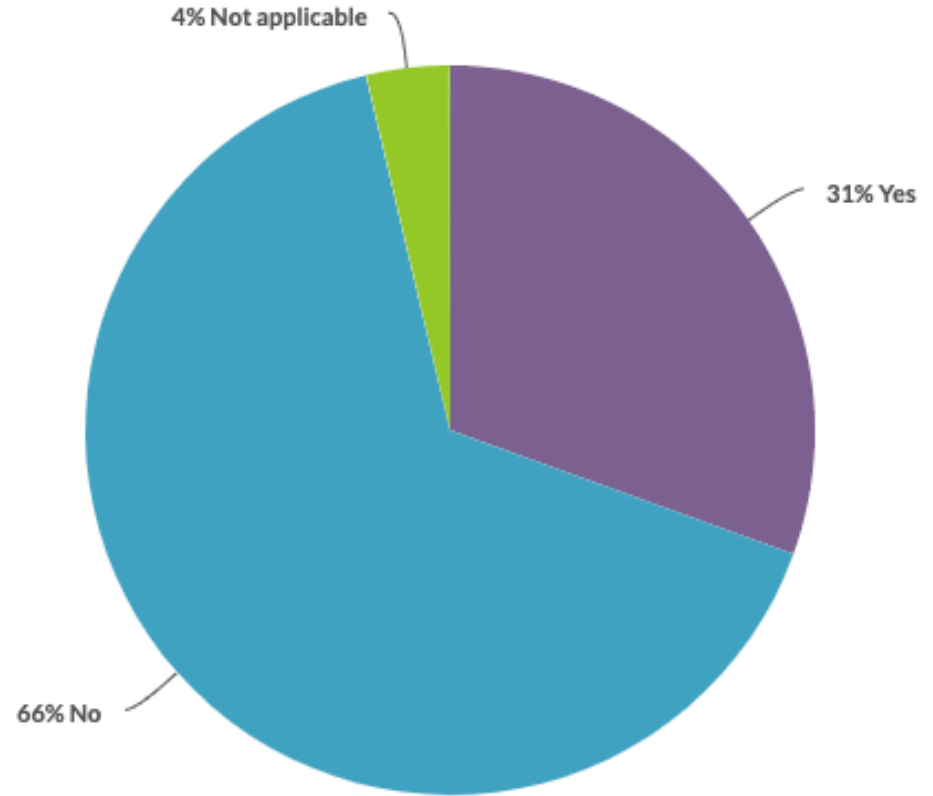
As a result of the crisis, do you find yourself using digital and social media in new ways?

Describe one new way you are using digital and social media.

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Social Media

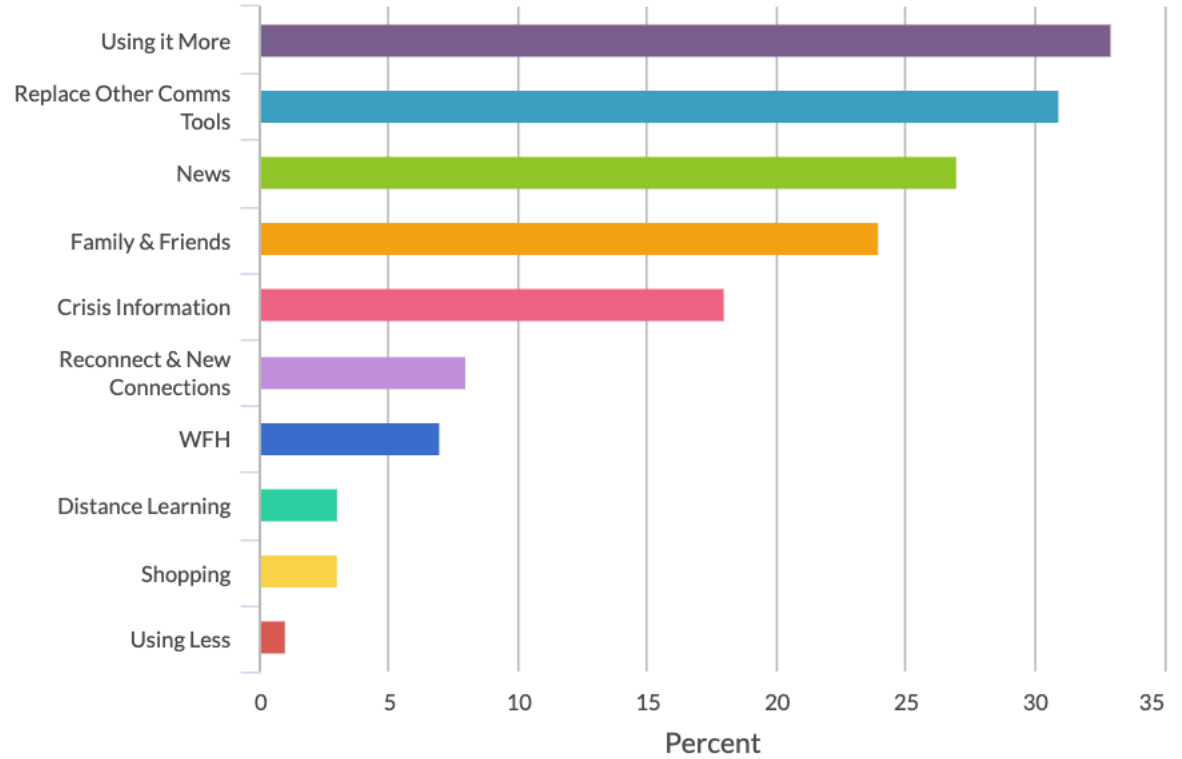
As a result of the crisis, do you find yourself using digital and social media in new ways?



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Social Media

Describe one new way you are using digital and social media.



Social Media

Describe one new way you are using digital and social media.

The verbatims indicate these themes:

- **Using it More (33%):** Increased use of social media
- **Replace Other Comms Tools (31%):** Using social media to replace phone, email, and other tools of communication
- **News (27%):** Send and receive news updates
- **Family & Friends (24%):** Connect with family and friends
- **Crisis Information (18%):** Send and receive information related to the crisis
- **Reconnect & New Connections (8%):** Reach out to people I have not connected with recently
- **WFH (7%):** Working from home
- **Distance Learning (3%):** Participate in online education
- **Shopping (3%):** Using social media for eCommmmerce
- **Using Less (1%):** Using social media less, to block out the noise



IN THEIR OWN WORDS...

Constantly looking at news updates which I never cared for before because it's so depressing but now it's a must

i'm staying connected to friends who i haven't talked to in years

Partaking in More surveys and other online work

I am using much more frequently

contacting my family more no longer face to face. and checking on people more often.

I am being more aware and paying more attention to the news and news articles surrounding the virus.

reconnecting with others, and engaging more with those that are also social distancing.

Learned to use Twitch and Discord for new ways of connecting with other people, musician and artists that I appreciate and would go support (concert, shows) under regular circumstances

There are people on social media such as TikTok that are promoting dances on how to promote social distancing and washing your hands and I think that's really creative and encourages other people to do so as well

Social Media

Implications

- While Social Media has been ubiquitous across demographic boundaries for some time now, Gen Z and Millennials are finding new, incremental ways to put it to use in the crisis. This merits deeper study.

Recommendations

- As organizations deliver meaning to the people they serve, Gen Z and Millennials can be expected to push the envelope in terms of novel usage.

Related Facts

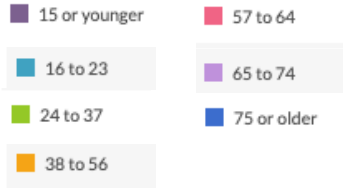
- New usage of social media is highly correlated to age and sex.
- Women are more likely to say *Yes*, and men slightly more likely to say *No*.
- Gen Z and Millennials are more likely to say *Yes*, and Gen X to 75+ more likely to say *No*.

Further Research: This question is strongly correlated to Sex and Age and may have predictive value (P-Values <0.01 and 0.001, respectively).

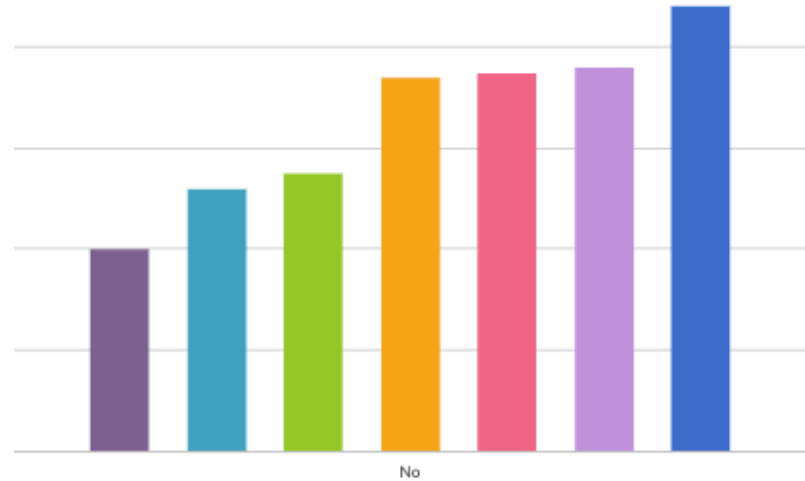
a

Social Media

Demographic Details



As a result of the crisis, do you find yourself using digital and social media in new ways?



Demographic
Details

	What was your sex at birth?			What is your age?						What is your household income?									Row Total	
	Male	Female	Row Total	16 to 23	24 to 37	38 to 56	57 to 64	65 to 74	75 or older	Row Total	Less than \$25,000	\$25,000 to \$34,999	\$35,000 to \$49,999	\$50,000 to \$74,999	\$75,000 to \$99,999	\$100,000 to \$124,999	\$125,000 to \$149,999	\$150,000 or more		
As a result of the crisis, do you find yourself using digital and social media in new ways?																				
Yes																				
Frequency	112	129	241	39	103	65	24	11	1	243	34	26	30	36	51	35	17	16	245	
Row %	46%	54%	32%	16%	42%	27%	10%	5%	0%	32%	14%	11%	12%	15%	21%	14%	7%	7%	32%	
Column %	26%	35%		43%	41%	24%	24%	17%	6%		32%	33%	29%	24%	32%	37%	33%	29%		
Index	83	112		135	130	74	77	55	19		102	102	93	74	101	116	103	90		
No																				
Frequency	299	225	524	47	138	203	74	48	15	525	61	51	67	109	104	60	35	40	527	
Row %	57%	43%	68%	9%	26%	39%	14%	9%	3%	68%	12%	10%	13%	21%	20%	11%	7%	8%	68%	
Column %	70%	61%		52%	55%	74%	75%	76%	88%		58%	64%	66%	71%	65%	63%	67%	71%		
Index	102	90		76	80	108	109	111	129		85	93	96	104	96	93	99	105		
Chi-square Test	X ² : ~7 DF: 1 P-Value: < 0.01		-	X ² : ~40 DF: 5 P-Value: < 0.001						-	X ² : ~6 DF: 7 P-Value: 0.585688									-
Column Total	427	367	765	91	251	276	99	63	17	768	105	80	102	153	159	95	52	56	772	
	56%	48%	100%	12%	33%	36%	13%	8%	2%	100%	14%	10%	13%	20%	21%	12%	7%	7%	100%	

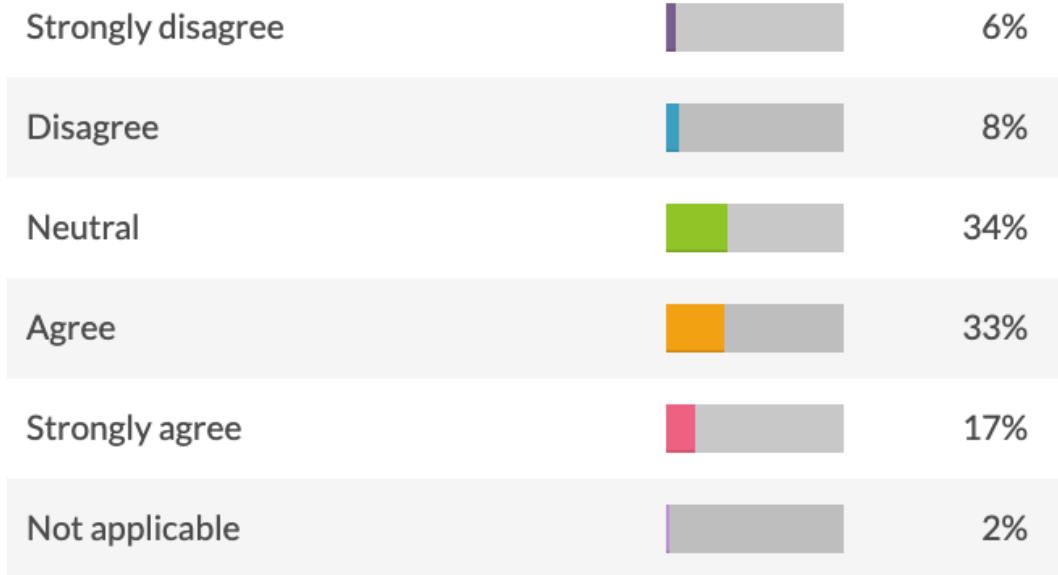
Utilities

How much do you disagree or agree with this statement: "I have a new-found appreciation for my utilities provider (e.g. electricity, gas, water, etc.)."

a

Utilities Provider

*How much do you disagree or agree with this statement:
"I have a new-found appreciation for my utilities provider (e.g. electricity, gas, water, etc.)."*



Utilities Provider

Implications

- Women seem to have a slightly stronger new-found appreciation for their utilities provider.
- Boomers and those with HHI under \$100k may be the sweet spot in terms of who to target for reputation persuasion.

Recommendations

- For utility organizations consider focusing reputation efforts on Women-friendly approaches based on this new-found appreciation; although further research is advisable.
- Consider skewing reputation efforts at those below \$100k in HHI.
- Consider skewing reputation efforts at neutral generations like Gen X and Boomers.

Related Facts

- Gen X and Boomers are more less likely to agree, but the other generations are more likely to agree.
- Men are more likely to say *Strongly Disagree*, Women more likely to say *Strongly Agree*.
- Boomers are the most likely to say *Neutral*.
- Those with HHI of \$100k-\$150K are more likely to *Disagree*.
- Interestingly, Construction and Operations workers are more likely to *Strongly/Disagree*.

Further Research: This question is strongly correlated to Age and may have predictive value (P-Value <0.01).

Demographic Details

	What was your sex at birth?			What is your age?						What is your ethnicity?			What is your household income?										
	Male	Female	Row Total	16 to 23	24 to 37	38 to 56	57 to 64	65 to 74	75 or older	Row Total	White	Chinese	Row Total	Less than \$25,000	\$25,000 to \$34,999	\$35,000 to \$49,999	\$50,000 to \$74,999	\$75,000 to \$99,999	\$100,000 to \$124,999	\$125,000 to \$149,999	\$150,000 or more	Row Total	
How much do you disagree or agree with this statement: "I have a new-found appreciation for my utilities provider (e.g. electricity, gas, water, etc.)."																							
Strongly disagree																							
Frequency	34	14	48	9	14	18	5	1	0	47	36	2	38	7	4	7	8	13	6	1	3	49	
Row %	71%	29%	6%	19%	30%	38%	11%	2%	0%	6%	95%	5%	6%	14%	8%	14%	16%	27%	12%	2%	6%	6%	
Column %	8%	4%		10%	6%	7%	5%	2%	0%		7%	3%		7%	5%	7%	5%	8%	6%	2%	5%	5%	
Index	129	62		165	93	109	84	26	0		104	49		107	80	110	84	131	101	31	86		
Disagree																							
Frequency	36	26	62	2	19	28	8	6	1	64	40	7	47	7	7	5	10	13	12	6	4	64	
Row %	58%	42%	8%	3%	30%	44%	13%	9%	2%	8%	85%	15%	8%	11%	11%	8%	16%	20%	19%	9%	6%	8%	
Column %	8%	7%		2%	8%	10%	8%	10%	6%		7%	11%		7%	9%	5%	7%	8%	13%	12%	7%	7%	
Index	106	89		27	92	124	99	116	72		93	139		82	108	60	80	101	155	142	88		
Neutral																							
Frequency	148	127	275	24	70	103	45	26	5	273	201	15	216	43	26	39	55	44	31	16	21	275	
Row %	54%	46%	35%	9%	26%	38%	16%	10%	2%	35%	93%	7%	37%	16%	9%	14%	20%	16%	11%	6%	8%	35%	
Column %	35%	35%		26%	28%	37%	45%	41%	29%		37%	24%		41%	33%	38%	36%	28%	33%	31%	38%	35%	
Index	98	98		76	80	107	130	118	84		102	65		117	93	109	103	79	93	88	107		
Agree																							
Frequency	140	122	262	28	89	87	25	25	8	262	172	21	193	29	24	32	50	58	33	20	17	263	
Row %	53%	47%	34%	11%	34%	33%	10%	10%	3%	34%	89%	11%	33%	11%	12%	19%	22%	22%	13%	8%	6%	33%	
Column %	33%	33%		31%	35%	32%	25%	40%	47%		32%	33%		28%	30%	31%	33%	36%	35%	38%	30%	33%	
Index	98	99		92	106	94	75	118	140		98	102		83	90	94	98	109	104	115	91		
Strongly agree																							
Frequency	63	70	133	23	53	40	15	3	2	136	80	16	96	14	17	18	27	31	13	7	9	136	
Row %	47%	53%	17%	17%	39%	29%	11%	2%	1%	17%	83%	17%	16%	10%	13%	13%	20%	23%	10%	5%	7%	17%	
Column %	15%	19%		25%	21%	14%	15%	5%	12%		15%	25%		13%	21%	18%	18%	19%	14%	13%	16%	17%	
Index	87	112		145	121	83	87	27	68		91	156		77	123	102	102	113	79	78	93		
Chi-square Test	X ² : -8 DF: 4 P-Value: 0.081875		-	X ² : -39 DF: 20 P-Value: < 0.01						-	X ² : -9 DF: 4 P-Value: 0.061088			X ² : -19 DF: 28 P-Value: 0.908716									-
Column Total	427	367	780	91	251	276	99	63	17	782	538	63	590	105	80	102	153	159	95	52	56	787	
	55%	47%	100%	12%	32%	35%	13%	8%	2%	100%	91%	11%	100%	13%	10%	13%	19%	20%	12%	7%	7%	100%	

Energy Sector

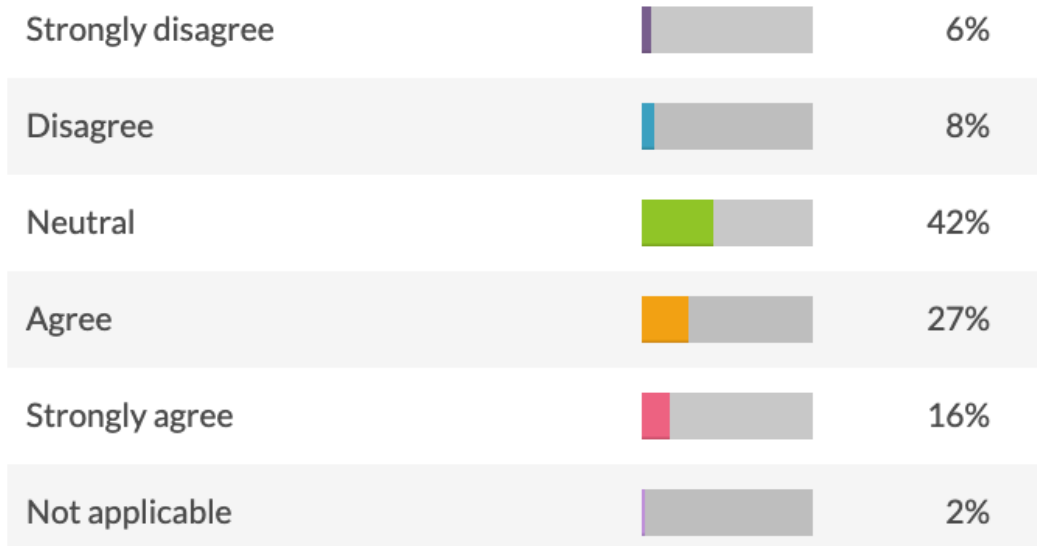
How much do you disagree or agree with this statement: "I have a new-found respect for people working in the energy sector."

Why might you have new-found respect for folks in the energy sector?

a

Energy Sector

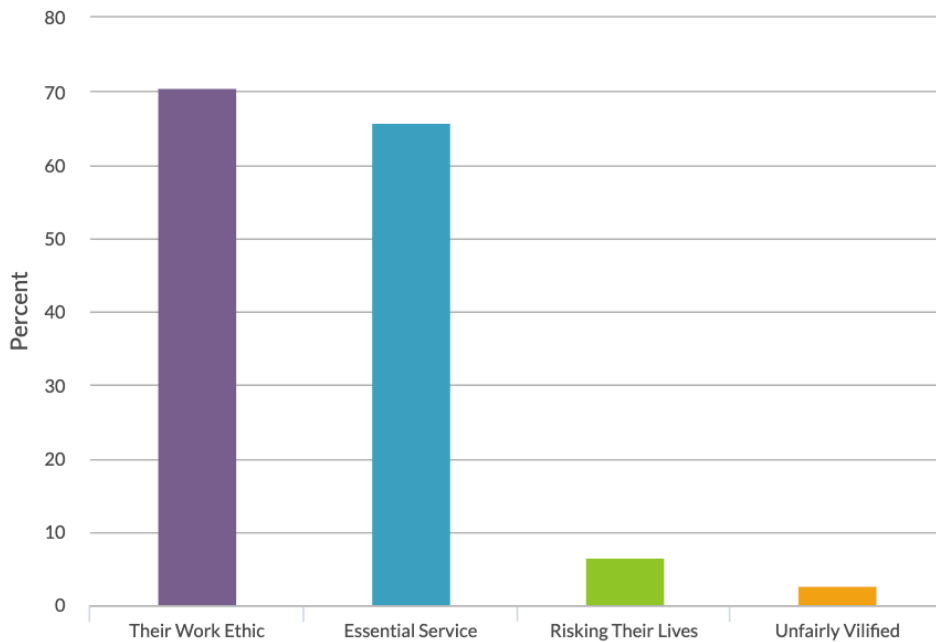
How much do you disagree or agree with this statement: "I have a new-found respect for people working in the energy sector."



a

Energy Sector

Why might you have new-found respect for folks in the energy sector?

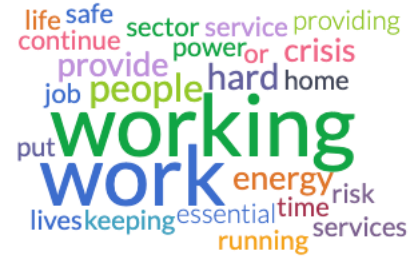


Energy Sector

Why might you have new-found respect for folks in the energy sector?

The verbatims indicate these themes:

1. **Their Work Ethic (71%):** They work extremely hard, in difficult conditions
2. **Essential Service (66%):** They provide an essential service
3. **Risking Their Lives (21%):** They risk their lives in their job, both from work conditions and being out during the pandemic
4. **Unfairly Vilified (9%):** They have been been unfairly vilified



IN THEIR OWN WORDS...

it is necessity so they need to work and put themselves at risk

They have to work side by side - and I mean WORK hard physically. They put their lives on the line every day, and I appreciate it.

They're still working and risking their lives because [they] are an essential service.

The world still needs to keep moving even in times like these, so I personally appreciate the people in these sectors to provide and keep on providing!!

Just the fact that they are still working and risking their own lives so our world can stay some what normal it's a selfless action.

Regardless of what is happening crisis wise they still show up for work and continue to do their jobs.

They are working so hard to keep everyone safe.

Because they have to keep working, focusing on making sure the economy keeps running while others are trapped at home.

I received an e-mail today from my electricity provider and they said they are in "crisis mode" and plan to continue to offer us services. Thank God!

Energy Sector

Implications

- This is interesting news for the energy sector, which in Canada has taken a significant beating in terms of domestic policy. The generally positive response may have been supported by the question, which focused on the people in the energy sector, not the sector itself. Further research would be advised on that front.

Recommendations

- Communications and service offerings should leverage the support among Gen Z (who are generally more conservative and traditional than pre-65+ generations), and those Millennials who are positively predisposed. This messaging can skew towards their *Unfairly Vilified* perspective.
- Leverage the current goodwill respondents displayed for the people delivering the services to regain the moral high ground.

Related Facts

- More Gen Z and Millennials said *Unfairly Vilified* than other generations.
- As with Utilities, Men are more likely to *Strongly/Disagree*; Women more likely to *Strongly/Agree*.
- Interestingly, Gen Z was very likely to *Strongly Agree*, in sharp contrast to Millennials who were conflicted and both highly likely to *Strongly Disagree* AND *Strongly Agree* (i.e. bimodal).
- Those 75+ were highly likely to *Agree*.
- For those who agreed gave the following reasons: *Essential Service*, *Risking Their Lives*, *Their Work Ethic*, and *Unfairly Vilified*

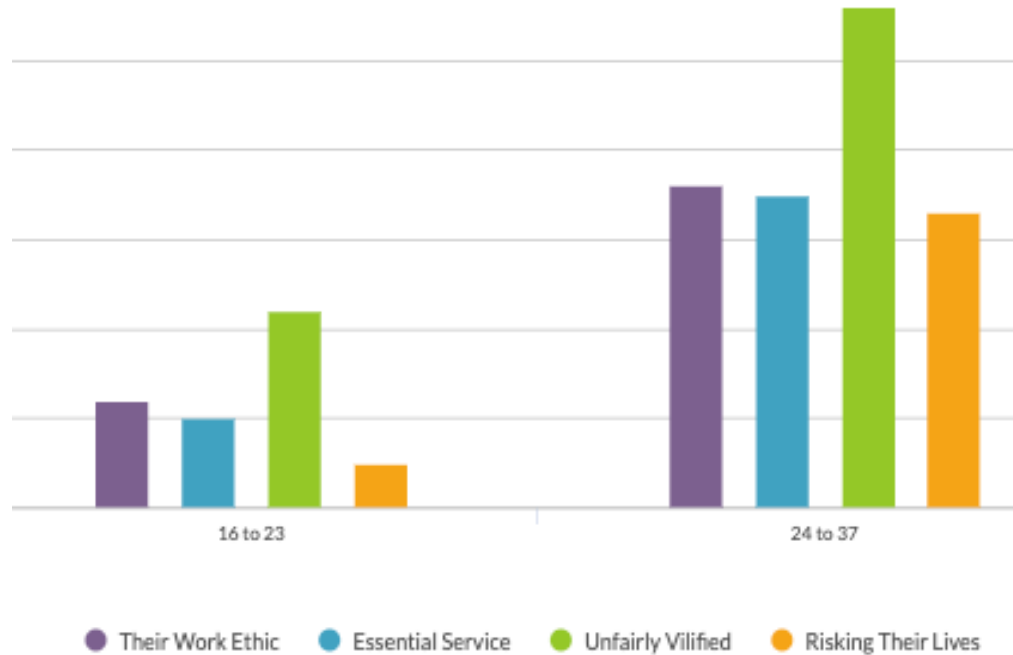
a

Demographic Details

	What was your sex at birth?		Row Total	What is your age?						Row Total	What is your household income?								Row Total
	Male	Female		16 to 23	24 to 37	38 to 56	57 to 64	65 to 74	75 or older		Less than \$25,000	\$25,000 to \$34,999	\$35,000 to \$49,999	\$50,000 to \$74,999	\$75,000 to \$99,999	\$100,000 to \$124,999	\$125,000 to \$149,999	\$150,000 or more	
How much do you disagree or agree with this statement: "I have a new-found respect for people working in the energy sector:"																			
Strongly disagree	29	16	45	5	17	13	5	2	0	42	5	4	8	7	9	7	2	3	45
Frequency	29	16	45	5	17	13	5	2	0	42	5	4	8	7	9	7	2	3	45
Row %	64%	36%	6%	12%	40%	31%	12%	5%	0%	5%	11%	9%	18%	16%	20%	16%	4%	7%	6%
Column %	7%	4%		5%	7%	5%	5%	3%	0%		5%	5%	8%	5%	6%	7%	4%	5%	
Index	117	75		102	125	87	94	59	0		83	87	136	80	98	128	67	93	
Disagree	38	21	59	7	16	30	4	6	0	63	10	6	8	5	13	10	2	9	63
Frequency	38	21	59	7	16	30	4	6	0	63	10	6	8	5	13	10	2	9	63
Row %	64%	36%	8%	11%	25%	48%	6%	10%	0%	8%	16%	10%	13%	8%	21%	16%	3%	14%	8%
Column %	9%	6%		8%	6%	11%	4%	10%	0%		10%	8%	8%	3%	8%	11%	4%	16%	
Index	117	75		95	79	134	50	118	0		118	93	97	41	102	131	48	200	
Neutral	183	151	334	36	88	124	48	33	5	334	45	30	39	72	66	35	23	24	334
Frequency	183	151	334	36	88	124	48	33	5	334	45	30	39	72	66	35	23	24	334
Row %	55%	45%	43%	11%	26%	37%	14%	10%	1%	43%	13%	9%	12%	22%	20%	10%	7%	7%	43%
Column %	43%	41%		40%	35%	45%	48%	52%	29%		43%	38%	38%	47%	42%	37%	44%	43%	
Index	100	96		92	82	105	113	122	69		100	88	90	110	97	86	104	100	
Agree	107	107	214	19	71	73	28	14	7	212	23	25	25	41	42	29	15	14	214
Frequency	107	107	214	19	71	73	28	14	7	212	23	25	25	41	42	29	15	14	214
Row %	50%	50%	28%	9%	33%	34%	13%	7%	3%	27%	11%	12%	12%	19%	20%	14%	7%	7%	27%
Column %	25%	29%		21%	28%	26%	28%	22%	41%		22%	31%	25%	27%	26%	31%	29%	25%	
Index	91	106		77	104	97	104	82	151		80	114	90	98	97	112	106	91	
Strongly agree	62	62	124	21	52	32	13	6	3	127	18	13	20	25	26	11	9	5	127
Frequency	62	62	124	21	52	32	13	6	3	127	18	13	20	25	26	11	9	5	127
Row %	50%	50%	16%	17%	41%	25%	10%	5%	2%	16%	14%	10%	16%	20%	20%	9%	7%	4%	16%
Column %	15%	17%		23%	21%	12%	13%	10%	18%		17%	16%	20%	16%	16%	12%	17%	9%	
Index	91	106		141	127	71	80	58	108		106	100	121	101	101	71	107	55	
Chi-square Test	X ² : -7 DF: 4 P-Value: 0.146299		-	X ² : -32 DF: 20 P-Value: 0.041177						-	X ² : -22 DF: 28 P-Value: 0.778367								-
Column Total	427	367	776	91	251	276	99	63	17	778	105	80	102	153	159	95	52	56	783
	55%	47%	100%	12%	32%	35%	13%	8%	2%	100%	13%	10%	13%	20%	20%	12%	7%	7%	100%

Demographic Details

Why might you have new-found respect for folks in the energy sector?



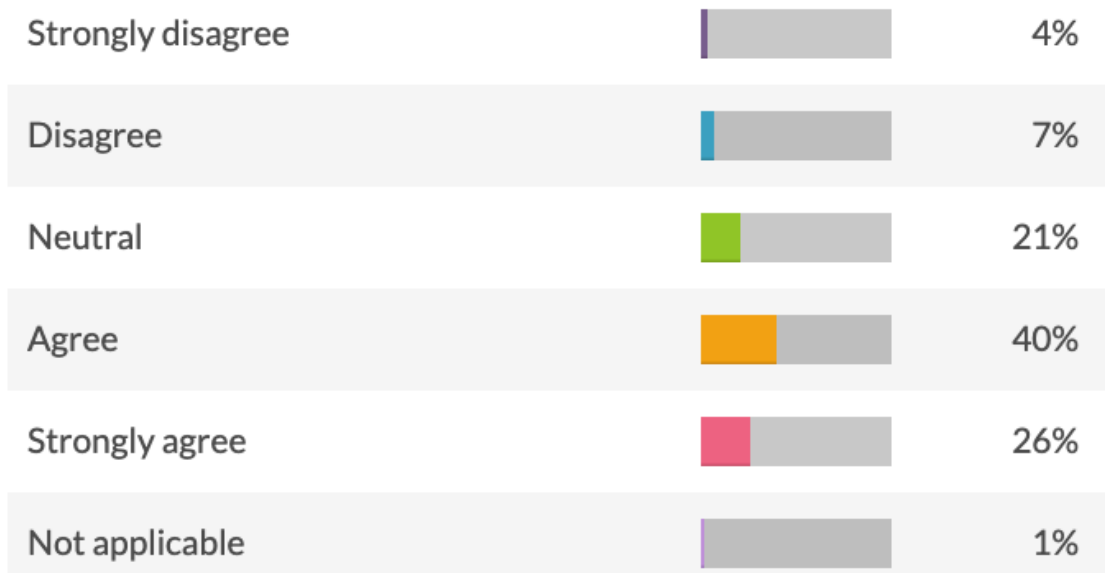
Environmental Design

How much do you disagree or agree with this statement: "Folks who plan public spaces need to know that people might not want to be too close together anymore."

a

Environmental Design

*How much do you disagree or agree with this statement:
"Folks who plan public spaces need to know that people might not want to be too close together anymore."*



Environmental Design

Implications

- The challenge for planners of public space moving forward will be how to design public spaces that acknowledge the new reality of spatial distancing in a post-COVID world.

Recommendations

- Public planners should prioritize this issue immediately and brief their suppliers to be on the lookout for solutions.
- This is a challenging topic that merits further study.

Related Facts

- \$25k-\$35k were more likely to *Strongly Agree*
- \$35k-\$75k and \$125k-\$150k+ were likely to *Strongly/Disagree*
- There were some interesting differences in Job profiles:
 - More likely to *Strongly/Disagree*: Architecture, Admin, Healthcare, Healthcare (bimodal), Unemployed, Education
 - More likely to *Strongly/Agree*: Accounting, Admin, Arts, Consulting, Customer Service, Healthcare (bimodal), Management, Sales/Marketing, Social Service, Science/Tech

Demographic Details

	What was your sex at birth?		Row Total	What is your age?						Row Total	What is your household income?								Row Total
	Male	Female		16 to 23	24 to 37	38 to 56	57 to 64	65 to 74	75 or older		Less than \$25,000	\$25,000 to \$34,999	\$35,000 to \$49,999	\$50,000 to \$74,999	\$75,000 to \$99,999	\$100,000 to \$124,999	\$125,000 to \$149,999	\$150,000 or more	
How much do you disagree or agree with this statement: "Folks who plan public spaces need to know that people might not want to be too close together anymore."																			
Strongly disagree	17	13	30	4	5	14	4	1	0	28	3	2	3	8	7	3	2	2	30
Frequency	17	13	30	4	5	14	4	1	0	28	3	2	3	8	7	3	2	2	30
Row %	57%	43%	4%	14%	18%	50%	14%	4%	0%	4%	10%	7%	10%	27%	23%	10%	7%	7%	4%
Column %	4%	4%		4%	2%	5%	4%	2%	0%		3%	3%	3%	5%	4%	3%	4%	4%	
Index	104	93		123	56	142	113	45	0		75	66	78	138	116	83	101	94	
Disagree	32	26	58	6	20	18	10	1	3	58	4	3	10	6	11	5	10	9	58
Frequency	32	26	58	6	20	18	10	1	3	58	4	3	10	6	11	5	10	9	58
Row %	55%	45%	7%	10%	34%	31%	17%	2%	5%	7%	7%	5%	17%	10%	19%	9%	17%	16%	7%
Column %	7%	7%		7%	8%	7%	10%	2%	18%		4%	4%	10%	4%	7%	5%	19%	16%	
Index	101	96		89	108	88	137	22	239		52	51	134	53	94	72	262	219	
Neutral	96	73	169	23	58	56	17	14	2	170	28	15	18	40	34	16	5	15	171
Frequency	96	73	169	23	58	56	17	14	2	170	28	15	18	40	34	16	5	15	171
Row %	57%	43%	22%	14%	34%	33%	10%	8%	1%	22%	16%	9%	11%	23%	20%	9%	3%	9%	22%
Column %	22%	20%		25%	23%	20%	17%	22%	12%		27%	19%	18%	26%	21%	17%	10%	27%	
Index	104	92		117	107	94	79	103	54		123	87	82	121	99	78	44	124	
Agree	175	142	317	34	90	109	44	33	8	318	39	30	42	57	65	48	20	19	320
Frequency	175	142	317	34	90	109	44	33	8	318	39	30	42	57	65	48	20	19	320
Row %	55%	45%	40%	11%	28%	34%	14%	10%	3%	40%	12%	9%	13%	18%	20%	15%	6%	6%	40%
Column %	41%	39%		37%	36%	39%	44%	52%	47%		37%	38%	41%	37%	41%	51%	38%	34%	
Index	101	96		92	89	98	110	129	116		92	93	102	92	101	125	95	84	
Strongly agree	104	106	210	23	72	78	23	13	3	212	26	29	26	40	42	23	15	11	212
Frequency	104	106	210	23	72	78	23	13	3	212	26	29	26	40	42	23	15	11	212
Row %	50%	50%	27%	11%	34%	37%	11%	6%	1%	27%	12%	14%	12%	19%	20%	11%	7%	5%	27%
Column %	24%	29%		25%	29%	28%	23%	21%	18%		25%	36%	25%	26%	26%	24%	29%	20%	
Index	91	108		94	106	105	86	77	65		92	135	95	98	99	90	108	73	
Chi-square Test	χ ² : -3 DF: 4 P-Value: 0.639101		-	χ ² : -22 DF: 20 P-Value: 0.355734						-	χ ² : -42 DF: 28 P-Value: 0.044305								-
Column Total	427	367	784	91	251	276	99	63	17	786	105	80	102	153	159	95	52	56	791
	54%	47%	100%	12%	32%	35%	13%	8%	2%	100%	13%	10%	13%	19%	20%	12%	7%	7%	100%

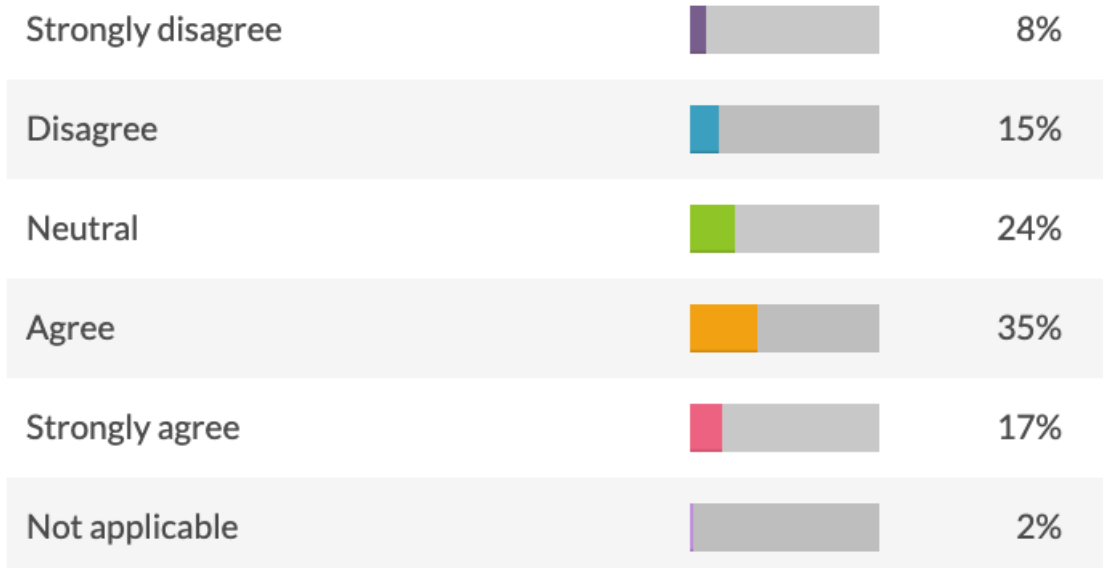
Online Education

How much do you disagree or agree with this statement: "When it comes to education, I believe online learning will be a sustainable approach over the long term."

a

Online Education

How much do you disagree or agree with this statement: "When it comes to education, I believe online learning will be a sustainable approach over the long term."



Online Education

Implications

- The respondents are not experts, but there are no obvious large-scale patterns in opinion. It may be necessary to cherry-pick specific demographics and study their perspective further.

Recommendations

- For institutions serving men with under \$35k HHI, there may be some perception barriers to surmount. There also may be resistance from within the Education industry.
- Further research may be worthwhile to get more actionable insight into the behavioural drivers and barriers related to distance education.

Online Education

Related Facts

- Men and Women are both likely to *Strongly/Disagree*.
- Gen Z, Millennials and Gen Z are more likely to *Strongly/Disagree*.
- Boomers are more likely to *Strongly/Agree*.
- 65-75 are more likely to *Disagree or be Neutral*.
- 75+ are more likely to *Agree*.

HHI

- <\$35k are more likely to *Strongly/Disagree*
- \$25k-\$35k are more likely to *Disagree* and *Strongly Agree* (bimodal)
- \$35k-\$75k are more likely to be *Neutral*
- \$125k-\$150k are more likely to *Strongly/Disagree*

Job

- *Strongly/Disagree*: Accounting, Admin, Architecture, Arts/Entertainment, Education (!!), Healthcare, Student
- *Strongly/Agree*: Healthcare, Management, Homemaker

Demographic Details

	What was your sex at birth?		Row Total	What is your age?						Row Total	What is your household income?								Row Total
	Male	Female		16 to 23	24 to 37	38 to 56	57 to 64	65 to 74	75 or older		Less than \$25,000	\$25,000 to \$34,999	\$35,000 to \$49,999	\$50,000 to \$74,999	\$75,000 to \$99,999	\$100,000 to \$124,999	\$125,000 to \$149,999	\$150,000 or more	
How much do you disagree or agree with this statement: "When it comes to education, I believe online learning will be a sustainable approach over the long term."																			
Strongly disagree																			
Frequency	39	22	61	6	20	26	3	3	0	58	9	6	5	10	14	6	6	5	61
Row %	64%	36%	8%	10%	34%	45%	5%	5%	0%	7%	15%	10%	8%	16%	23%	10%	10%	8%	8%
Column %	9%	6%		7%	8%	9%	3%	5%	0%		9%	8%	5%	7%	9%	6%	12%	9%	8%
Index	117	77		89	107	127	41	64	0		110	97	63	84	113	81	149	115	
Disagree																			
Frequency	55	62	117	22	42	33	9	11	0	117	15	15	13	17	21	18	12	6	117
Row %	47%	53%	15%	19%	36%	28%	8%	9%	0%	15%	13%	13%	11%	15%	18%	15%	10%	5%	15%
Column %	13%	17%		24%	17%	12%	9%	17%	0%		14%	19%	13%	11%	13%	19%	23%	11%	5%
Index	86	112		161	112	80	61	117	0		96	126	86	75	89	127	155	72	
Neutral																			
Frequency	108	81	189	22	55	68	26	18	2	191	23	17	31	49	31	15	10	15	191
Row %	57%	43%	24%	12%	29%	36%	14%	9%	1%	24%	12%	9%	16%	26%	16%	8%	5%	8%	24%
Column %	25%	22%		24%	22%	25%	26%	29%	12%		22%	21%	30%	32%	19%	16%	19%	27%	8%
Index	104	91		99	90	101	107	117	48		90	87	125	132	80	65	79	110	
Agree																			
Frequency	150	131	281	24	88	95	42	21	11	281	34	21	37	50	67	39	15	20	283
Row %	53%	47%	36%	9%	31%	34%	15%	7%	4%	36%	12%	7%	13%	18%	24%	14%	5%	7%	36%
Column %	35%	36%		26%	35%	34%	42%	33%	65%		32%	26%	36%	33%	42%	41%	29%	36%	7%
Index	97	99		73	97	96	118	93	180		90	73	101	91	117	114	80	99	
Strongly agree																			
Frequency	70	61	131	15	44	49	18	7	1	134	18	20	16	23	22	16	9	10	134
Row %	53%	47%	17%	11%	33%	37%	13%	5%	1%	17%	13%	15%	12%	17%	16%	12%	7%	7%	17%
Column %	16%	17%		16%	18%	18%	18%	11%	6%		17%	25%	16%	15%	14%	17%	17%	18%	5%
Index	97	99		96	102	103	106	65	34		101	147	92	88	81	99	102	105	
Chi-square Test	X ² : -6 DF: 4 P-Value: 0.236969		-	X ² : -33 DF: 20 P-Value: 0.033288						-	X ² : -31 DF: 28 P-Value: 0.308036								-
Column Total	427	367	779	91	251	276	99	63	17	781	105	80	102	153	159	95	52	56	786
	55%	47%	100%	12%	32%	35%	13%	8%	2%	100%	13%	10%	13%	19%	20%	12%	7%	7%	100%

Rent vs. Own

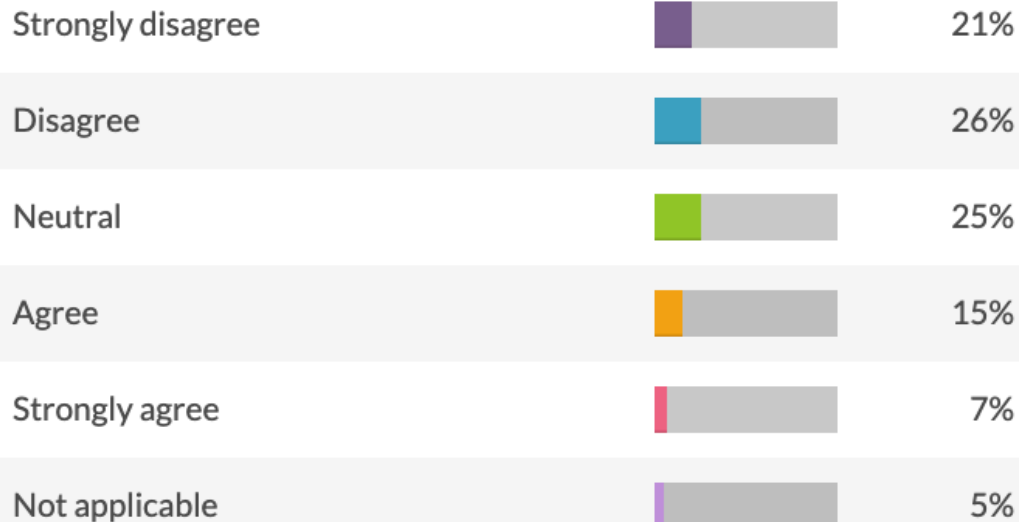
*How much do you disagree
or agree with this statement:
"If I needed a new place to
live, I would rent rather
than buy."*

*Why might you prefer to rent
rather than buy at this point?*

a

Rent vs. Own

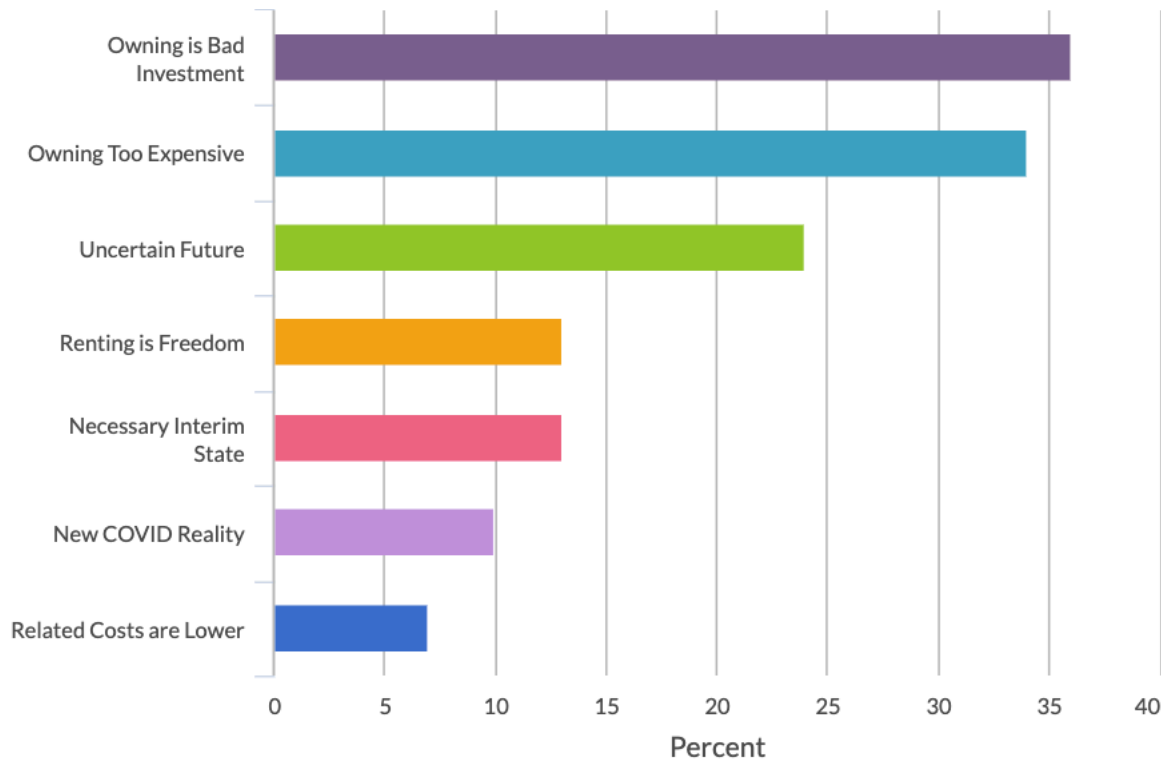
*How much do you disagree or agree with this statement:
"If I needed a new place to live, I would rent rather than buy."*



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Rent vs. Own

Why might you prefer to rent rather than buy at this point?



Rent vs. Own

How much do you disagree or agree with this statement: "If I needed a new place to live, I would rent rather than buy."

The verbatims indicate these themes:

1. **Owning is Bad Investment (36%):** Concerns over market volatility over the long term
2. **Owning Too Expensive (34%):** Getting into the market is cost-prohibitive
3. **Uncertain Future (24%):** When times are uncertain, renting is more attractive
4. **Renting is Freedom (13%):** I can come and go as I please and not be tied to one location
5. **Necessary Interim State (13%):** Renting is just something I have to do for now
6. **New COVID Reality (10%):** The virus has changed my perspective away from ownership
7. **Related Costs are Lower (7%):** All the associated costs are lower or non-existent with renting (e.g. maintenance, insurance, property upkeep, etc.)



IN THEIR OWN WORDS...

Why own it I might die tomorrow?

Because renting provides freedom vs being tied to a mortgage

Ability to pack and go. You wouldn't be tied down to something such as mortgage or tenants renting your home. More freedom I think

At this point in time I would rather rent because who knows where we might end up, alive or dead because of COVID-19 virus. I am just going to rent until I find out what happens next week or year.

Renting isn't throwing money away, you get a place to live. Buying has an opportunity cost, the amount you can invest and earn on the down payment, taxes, insurance payments, and interest. You don't have to pay for repairs, maintenance, or other issues that come up

I preferred to rent before the virus. I like the opportunity to be free to move around

We are low income seniors who couldn't afford to buy. Plus, we can live on a lot less without all the extra expenses like utilities and upkeep. There would be far less hassle if we pass away as family would have to disperse everything. Not having to sell property would simplify everything.

Rent vs. Own

Implications

- For real estate organizations focused on rental property there are some compelling reasons in favour of renting, and it appears that the kind of uncertainty we see now drives people out of the buying market.
- This may be an opportunity to break out of the Age/HHI rut in which renting has traditionally found itself.

Recommendations

- Consider ways to position renting considering the identified crisis realities and develop product offerings that acknowledge people's perceptions that favour renting as a viable alternative.
- Consider focusing on the strongest support: Millennials, Gen Z and 65+ (not Gen X and Boomers), with a *Renting is Freedom* message and/or *Related Costs are Lower*.

Rent vs. Own

Related Facts

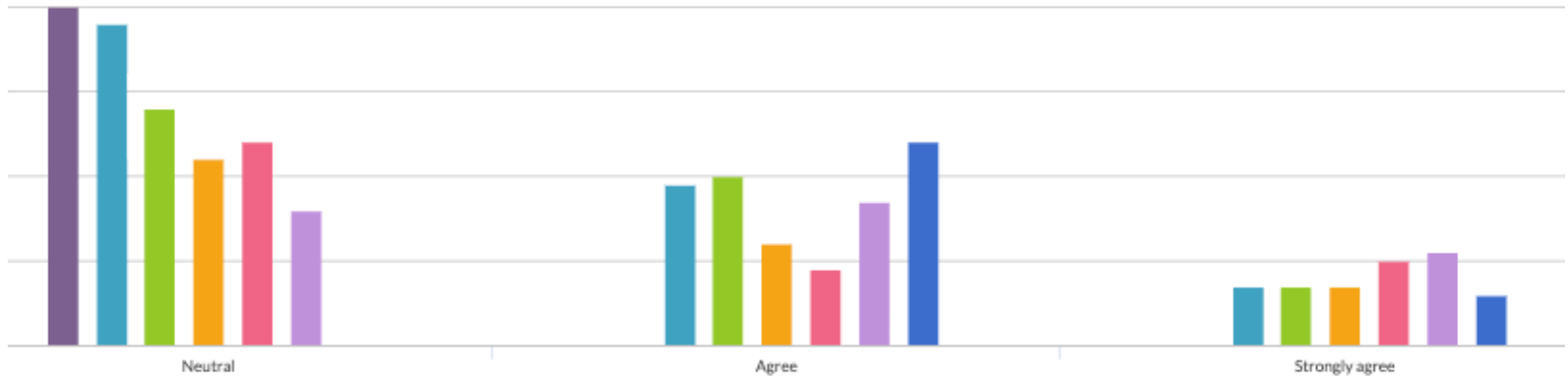
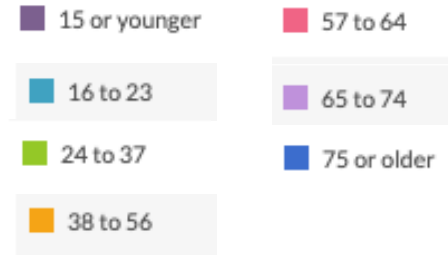
- Gen X and Boomers agree less than Gen Z, Millennials, and 65+.
- As people age, they are:
 - More likely to *Strongly/Disagree*
 - More likely to *Agree*, becoming increasingly more certain as they age
- Lower HHI are more likely to *Agree/Strongly Agree* (esp. \$25k+).
- Higher HHI are more likely to *Strongly/Disagree*.
- The inflection point seems to be \$75k-\$100k.
- Consider focusing on the strongest support: Millennials, Gen Z and 65+ (not Gen X and Boomers), who also said *Renting is Freedom* most.
- Boomers and 65-75 said *Related Costs are Lower* more than other generations.

Further Research: This question is strongly correlated to Age and HHI and may have predictive value (P-Values: <0.01 and <0.001 respectively)

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Rent vs. Own

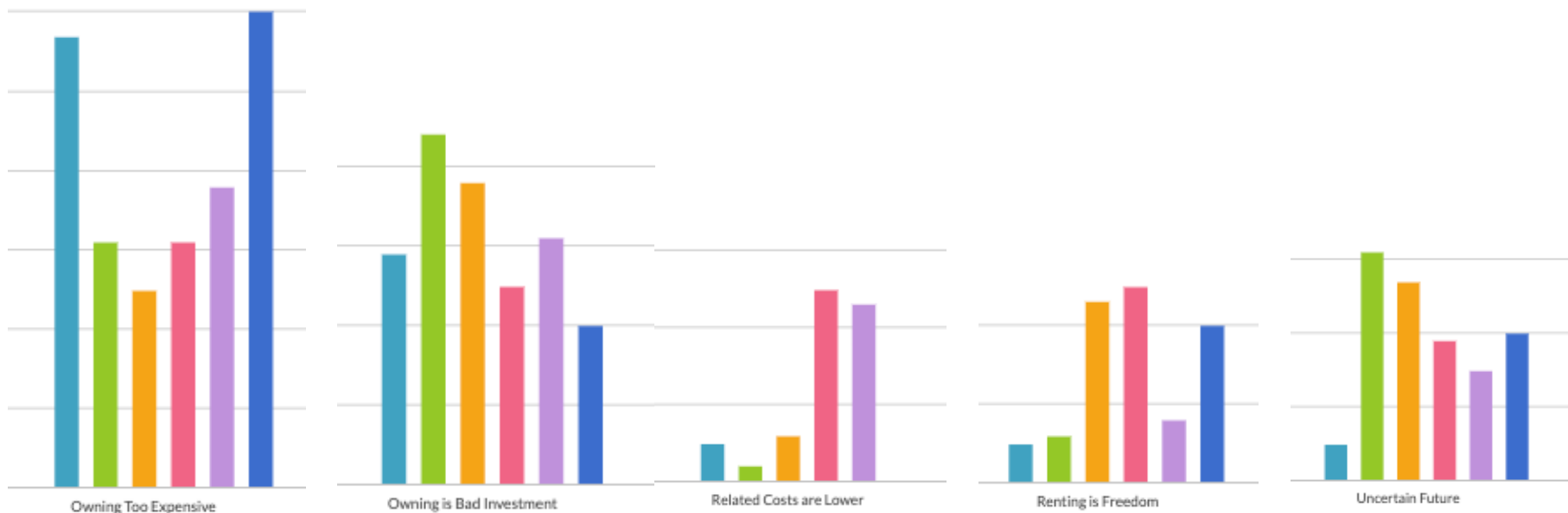
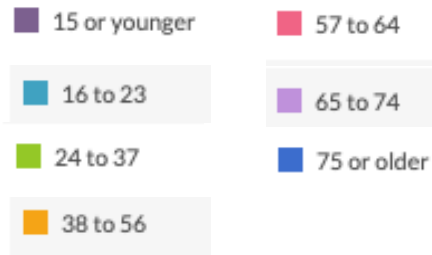
Demographic
Details



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Rent vs. Own

Demographic
Details



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Demographic Details

	What was your sex at birth?			What is your age?							What is your household income?										
	Male	Female	Row Total	16 to 23	24 to 37	38 to 56	57 to 64	65 to 74	75 or older	Row Total	Less than \$25,000	\$25,000 to \$34,999	\$35,000 to \$49,999	\$50,000 to \$74,999	\$75,000 to \$99,999	\$100,000 to \$124,999	\$125,000 to \$149,999	\$150,000 or more	Row Total		
How much do you disagree or agree with this statement: "If I needed a new place to live, I would rent rather than buy."																					
Strongly disagree	93	74	167	11	52	63	22	14	2	164	17	12	20	20	34	25	23	16	167		
Frequency	56%	44%	22%	7%	32%	38%	13%	9%	1%	22%	10%	7%	12%	12%	20%	15%	14%	10%	22%		
Row %	22%	20%		12%	21%	23%	22%	22%	12%		16%	15%	20%	13%	21%	26%	44%	29%			
Column %	99	91		56	96	106	103	103	54		74	69	90	60	98	120	202	131			
Index																					
Disagree	110	99	209	19	54	85	29	19	5	211	15	21	23	42	50	26	14	20	211		
Frequency	53%	47%	28%	9%	26%	40%	14%	9%	2%	28%	7%	10%	11%	20%	24%	12%	7%	9%	28%		
Row %	26%	27%		21%	22%	31%	29%	30%	29%		14%	26%	23%	27%	31%	27%	27%	36%			
Column %	93	98		75	77	111	105	108	106		52	95	82	99	114	99	97	129			
Index																					
Neutral	111	90	201	35	71	62	24	10	0	202	30	20	24	46	36	27	7	14	204		
Frequency	55%	45%	27%	17%	35%	31%	12%	5%	0%	27%	15%	10%	12%	23%	18%	13%	3%	7%	27%		
Row %	26%	25%		38%	28%	22%	24%	16%	0%		29%	25%	24%	30%	23%	28%	13%	25%			
Column %	98	92		144	106	84	91	60	0		107	94	88	112	85	106	50	94			
Index																					
Agree	63	58	121	17	49	32	9	11	4	122	24	11	20	24	25	9	6	3	122		
Frequency	52%	48%	16%	14%	40%	26%	7%	9%	3%	16%	20%	9%	16%	20%	20%	7%	5%	2%	16%		
Row %	15%	16%		19%	20%	12%	9%	17%	24%		23%	14%	20%	20%	16%	9%	12%	5%			
Column %	92	99		116	121	72	56	108	146		143	86	123	98	98	59	72	34			
Index																					
Strongly agree	33	25	58	6	17	18	10	7	1	59	9	11	10	14	9	4	1	1	59		
Frequency	57%	43%	8%	10%	29%	31%	17%	12%	2%	8%	15%	19%	17%	24%	15%	7%	2%	2%	8%		
Row %	8%	7%		7%	7%	7%	10%	11%	6%		9%	14%	10%	9%	6%	4%	2%	2%			
Column %	101	89		85	87	84	130	143	76		111	178	127	118	73	54	25	23			
Index																					
Chi-square Test	X ² : ~1 DF: 4 P-Value: 0.934012		-	X ² : ~38 DF: 20 P-Value: < 0.01							-	X ² : ~63 DF: 28 P-Value: < 0.001									-
Column Total	427	367	756	91	251	276	99	63	17	758	105	80	102	153	159	95	52	56	763		
	56%	49%	100%	12%	33%	36%	13%	8%	2%	100%	14%	10%	13%	20%	21%	12%	7%	7%	100%		

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Summary & Recommendations

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Summary & Recommendations

1. Back to Basics
2. Consumerism is Cancelled
3. Energy Matters
4. Working from Home
5. Now It's About Strangers

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Back to Basics



Summary & Recommendations

Back to Basics

The basics of life are now more important than ever.

- 67% of respondents Strongly/Agree that the basic aspects of life are now more important because of this crisis, and 10% Strongly/Disagree. The basics include:
 - Family
 - Human connection
 - Altruism
 - Practical support
 - Essential services
 - Public-mindedness
 - Less materialism
 - Freedom of movement
 - Simplified lifestyle
 - Access to outdoors
 - Quality and longevity in products
- **Recommendation:** When serving and communicating with Canadians, organizations should consider making a clear connection between the meaning they bring to people and these basics of life.

Consumerism is Cancelled



Summary & Recommendations

Consumerism is Cancelled

Respondents' ranking of brand expectations for the future was counterintuitive.

- The highest priority, by far, is *Be Compassionate to Staff*. The next priority is *Live their Values Beyond the Product*, followed by *Demonstrate a Local Connection* and *Helping Me Live My Own Values*. Comparatively less important are *Easy Online Purchasing* and *Connecting with Me Individually*.
- In terms of spending changes they expect to make post-COVID, respondents said the following: *Save & Prepare* (44%), *Necessities First* (38%), *Spend Less* (28%), *Not Sure* (15%), *Meaning Over Things* (9), *More Charity* (4%), etc.
- **Recommendation:** Now and in the future, visibly and clearly demonstrate your commitment to the people in your company. Go beyond just openly living your own corporate values – bring new meaning to customers by helping them live their own values too. Make extra effort to leverage and openly demonstrate all local connections to each community in which you operate. Focus less on connecting with customers individually and prioritize the foregoing.

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Energy Matters Again



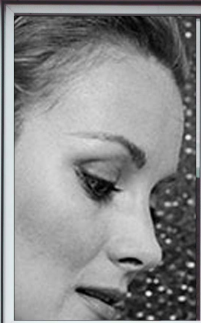
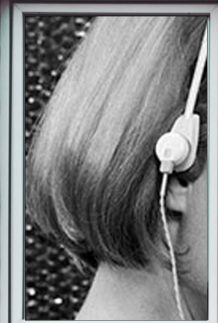
Summary & Recommendations

Energy Matters Again

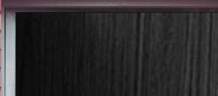
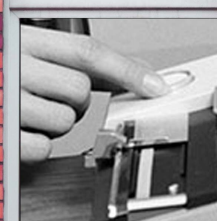
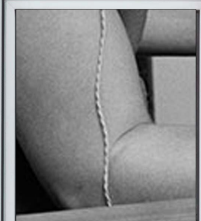
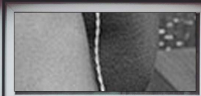
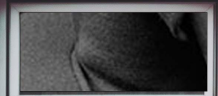
Respondents have new-found appreciation and respect for the energy sector.

- 43% of respondents Strongly/Agree they have new-found respect for people working in the energy sector and only 14% Strongly/Disagree. Reasons included *Their Work Ethic, Essential Services, Risking Their Lives, Unfairly Vilified*. Similarly, 50% of respondents have a few-found appreciation for their utility provider.
- **Recommendation:** Communications and service offerings should leverage the support among Gen Z (who are generally more conservative and traditional than pre-65+ generations), and those Millennials who are positively predisposed. Leverage the current goodwill respondents displayed for the people delivering the services to regain the moral high ground.

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WFH



Summary & Recommendations

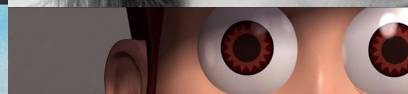
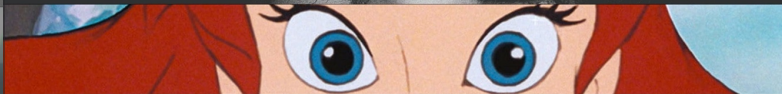
Working from Home

Respondents are mixed on work from home.

- 34% of respondents have worked from home during the crisis, 57% of those would like to do so more often, and 14% would not.
- The highest priority challenges respondents face are not technical, but interpersonal. They ranked their challenges in this order: *Missing Basic Human Connection*. Other challenges include *Difficulty Coordinating Task Items*, *Hard Time Keeping Myself Motivated*, *Challenges Collaborating and Brainstorming*, *Reasons to Get Dressed and Be Presentable*, followed by *Access to Files and Documents*, and *Video Conference Technical Challenges*.
- **Recommendation:** For organizations involved with, or serving, those who have remote workers, it is critical that they address the importance of daily human contact as a challenge, separate and above the function challenges of distance cooperation and team dynamics.

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Now It's About Strangers



Summary & Recommendations

Now It's About Strangers

Respondents say they are more altruistic.

- 38% of respondents Strongly/Agree that they feel more altruistic to strangers now. 27% report a renewed sense of religious faith, and 37% did not.
- **Recommendation:** When creating strategy around living one's organizational values, as well as helping customers live out theirs, be mindful of the fact that altruism towards strangers is an important part of the consideration set right now, especially for Gen Z, and that religious sensibilities should be at least respected.

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Thank you.

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Raw data access available on request

