



# Canada This Month COVID-19 and Changes in Consumer Behaviour

Public Opinion Research  
Release Date: July 02, 2020  
Field Dates: June 19 to June 23, 2020

# Getting Back to Normal

Today, INNOVATIVE is releasing results from our June Canada This Month survey. This report covers key results on how Canadians have changed their buying habits, banking habits, trips to restaurants and movies, as well as their travel habits.

This online survey was in field from June 19<sup>th</sup> to 23<sup>rd</sup>, with a weighted sample size of 1,200 and oversamples in BC and Alberta. A detailed methodology is provided in the appendix.

The COVID-19 outbreak has forced Canadians to change how they behave in a range of areas from travel, to social outings, to shopping. Canadians have had to find new ways to keep themselves busy and manage daily activities. Many say they are not planning to go back to how things were before.

# Major Purchases

While many delayed making major purchases since the outbreak of COVID-19 began, looking ahead to the next 6 months Canadians expect to make as many major purchases as we find in more prosperous times.

# Delayed Major Purchases: A large share of people who normally would have made a major purchase delayed them due to COVID-19<sup>4</sup>



Thinking about these same items, are there any that you delayed purchasing because of COVID-19?

[asked of all respondents; n=1,200]

**Make renovations to your home over and above regular maintenance and upkeep**

17%

78%

5%

**Purchase a TV, stereo, or home computer**

14%

81%

5%

**Purchase a car, truck, or other vehicle**

14%

81%

5%

**Purchase a fridge, stove, or other major appliance**

11%

84%

4%

**Purchase a new home**

8%

88%

4%

■ Yes

■ No

■ Don't know

# Potential Purchases: Some indication there may be some retail “catch-up” in the next few months



And looking to the next 6 months, are you planning to do any of the following...?

[asked of all respondents; n=1,200]

## Make renovations to your home over and above regular maintenance and upkeep



## Purchase a TV, stereo, or home computer



## Purchase a fridge, stove, or other major appliance



## Purchase a car, truck, or other vehicle



## Purchase a new home



■ Yes

■ No

■ Don't know

# Fear as a Barrier

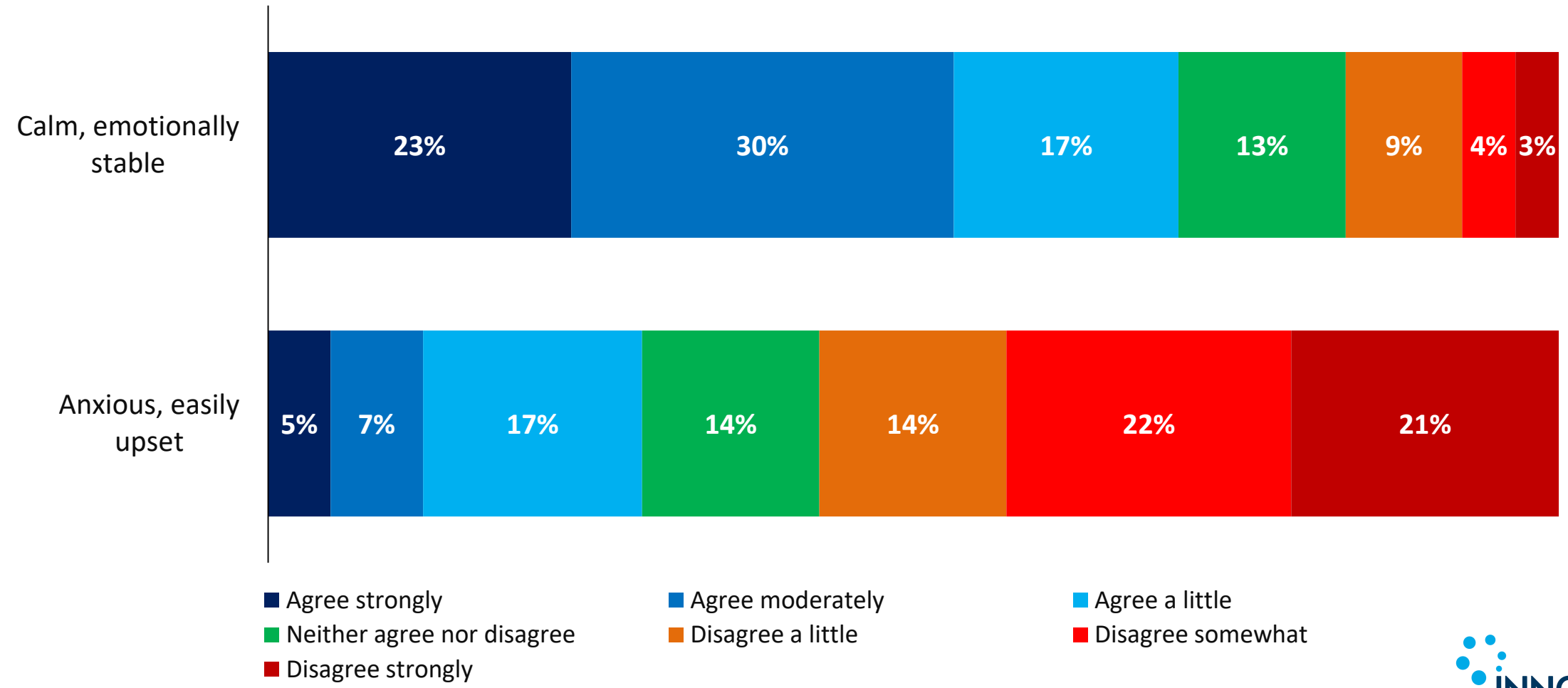
As we dig into public behaviours, we want to understand the role of anxiety in behaviour change. We have segmented respondents using two different measures of anxiety and fear – general anxiousness and specific concern about COVID-19. These segments are used for analysis throughout the remainder of the report.

# Some people are anxious in general. We use two-items from the Big 5 Personality battery to group people by level of general anxiety.



Here are a number of personality traits that may or may not apply to you. Please indicate the extent to which you agree or disagree with that statement. You should rate the extent to which the pair of traits applies to you, even if one characteristic applies more strongly than the other. I see myself as:

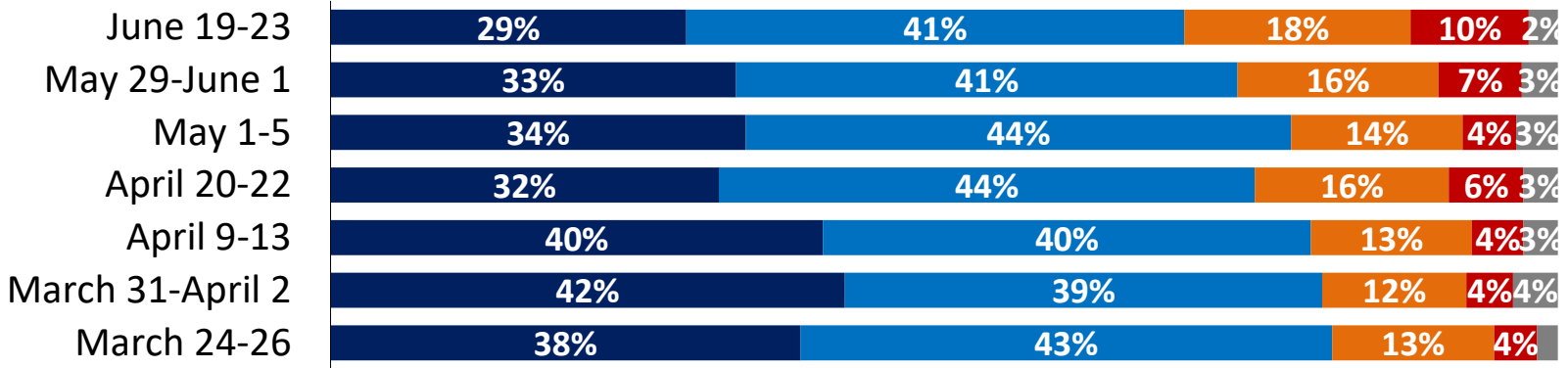
[asked of all respondents; n=1,200]



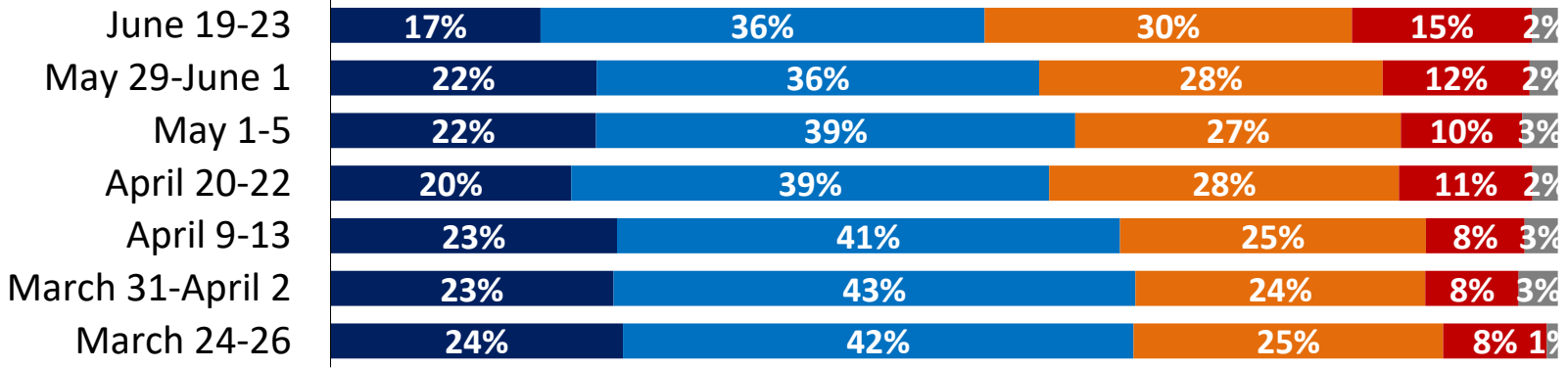
# COVID-19 Specific Anxiety: Strong concern that a vulnerable friend or relative will contract the virus down to 29%, lowest since tracking began

Q How concerned are you personally about each of the following?  
 [asked of all respondents; n=1,200]

**That a vulnerable friend or a relative will contract COVID-19**



**That you yourself will contract COVID-19**



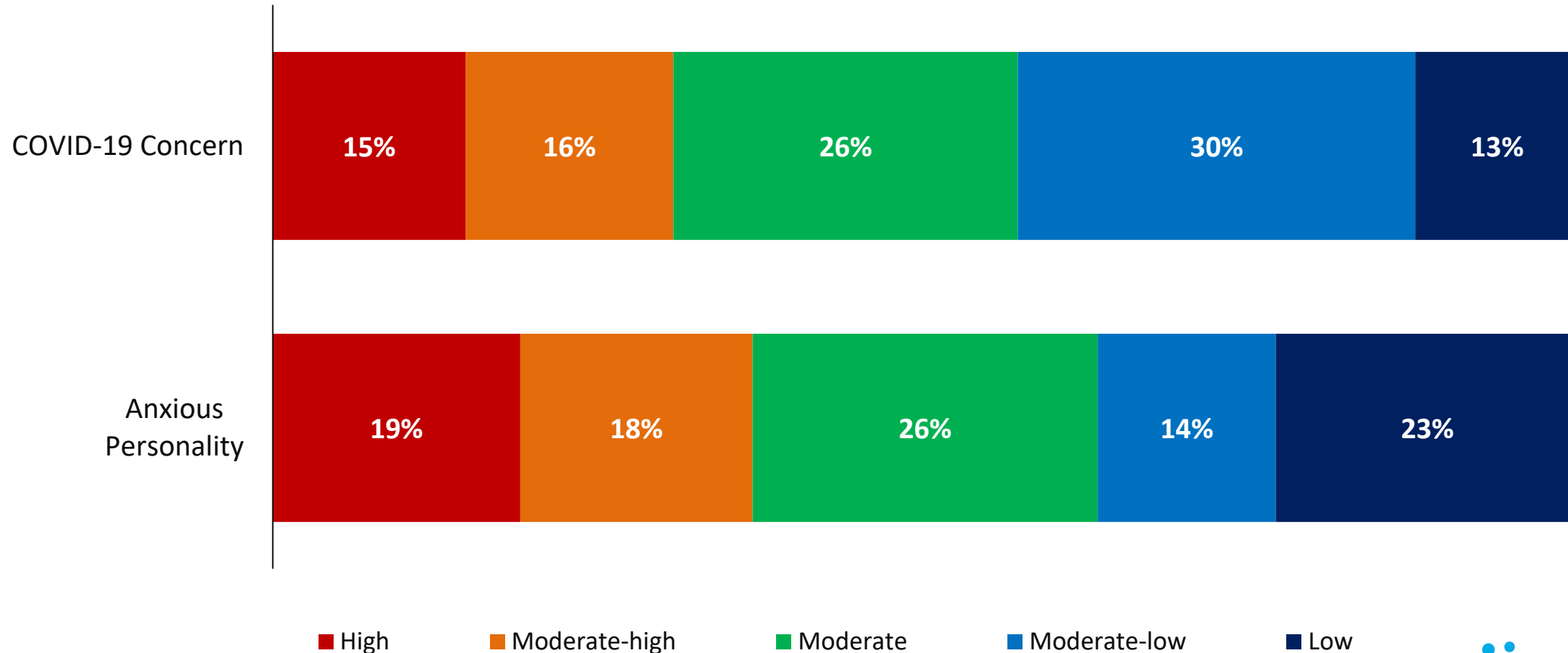
■ Very concerned   
 ■ Somewhat concerned   
 ■ Not very concerned   
 ■ Not at all concerned   
 ■ Don't know





# Anxiety and Concern Indexes

We have used both the concern about COVID-19 questions and the anxious personality questions to create two indexes of anxiety and concern. Respondents are grouped into quintiles with the other most similar respondents.



# Going to the Office

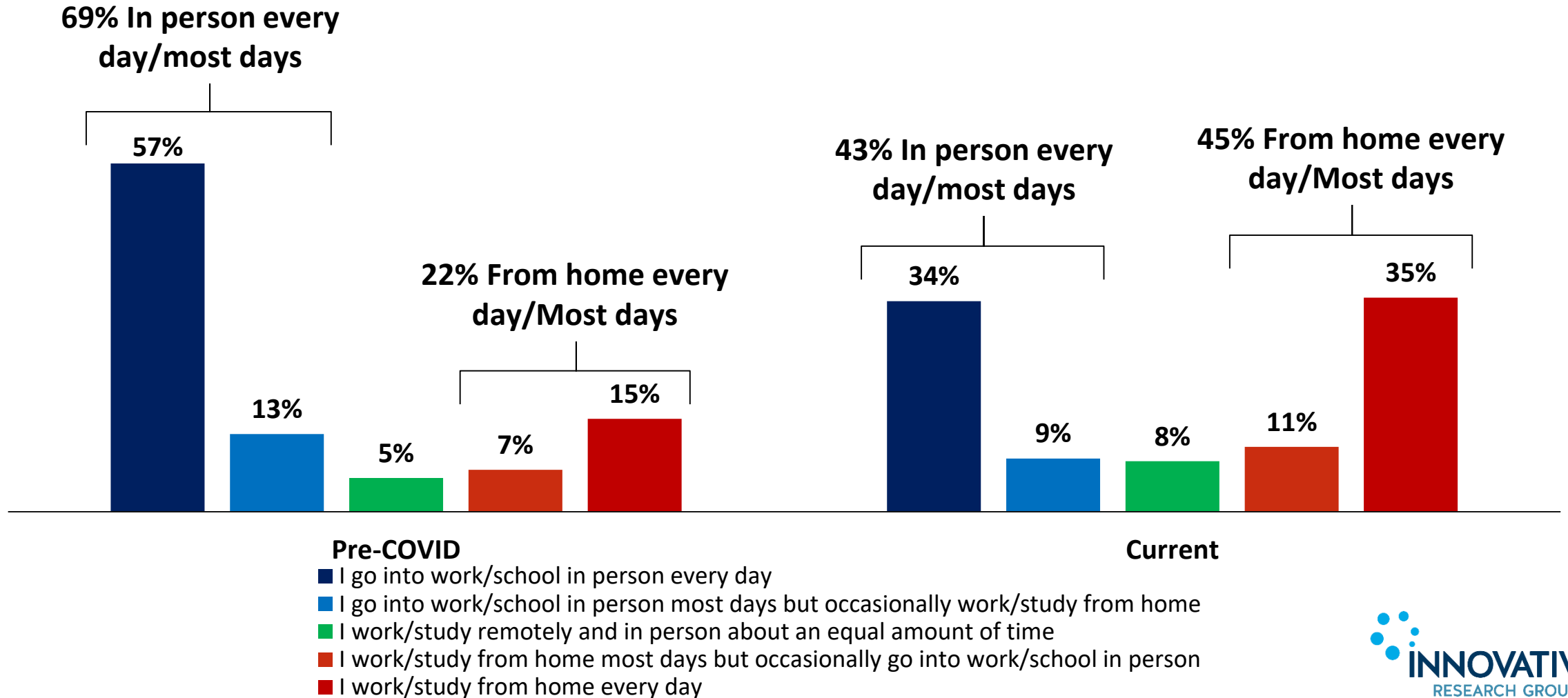
More than half of Canadians say that in January they went into work or school every day, but that share is down 22 points. The share who work from home every day is up 20 points. About two-thirds of those Canadians expect to go back to work.

Almost two thirds (64%) of those who expect to return to their workplace are worried that it will put them at risk of catching COVID-19 but only 24% say very concerned. Those worries are being driven by concerns about social distancing and fear of poor behaviour by others.

# Working From Home: A plurality now say they work from home at least most days including 35% who say they work exclusively from home



Thinking about the start of the year before the COVID-19 outbreak began, which of the following describes best described your work/school? **AND** Thinking about your work/school now, which of the following describes your current work/school best?  
[asked of those who are currently employed or at school; n=627]



Note: 'Don't know' not shown.

# Returning to Work: A majority of those currently working from home or temporarily laid off say it is likely they will be asked to return

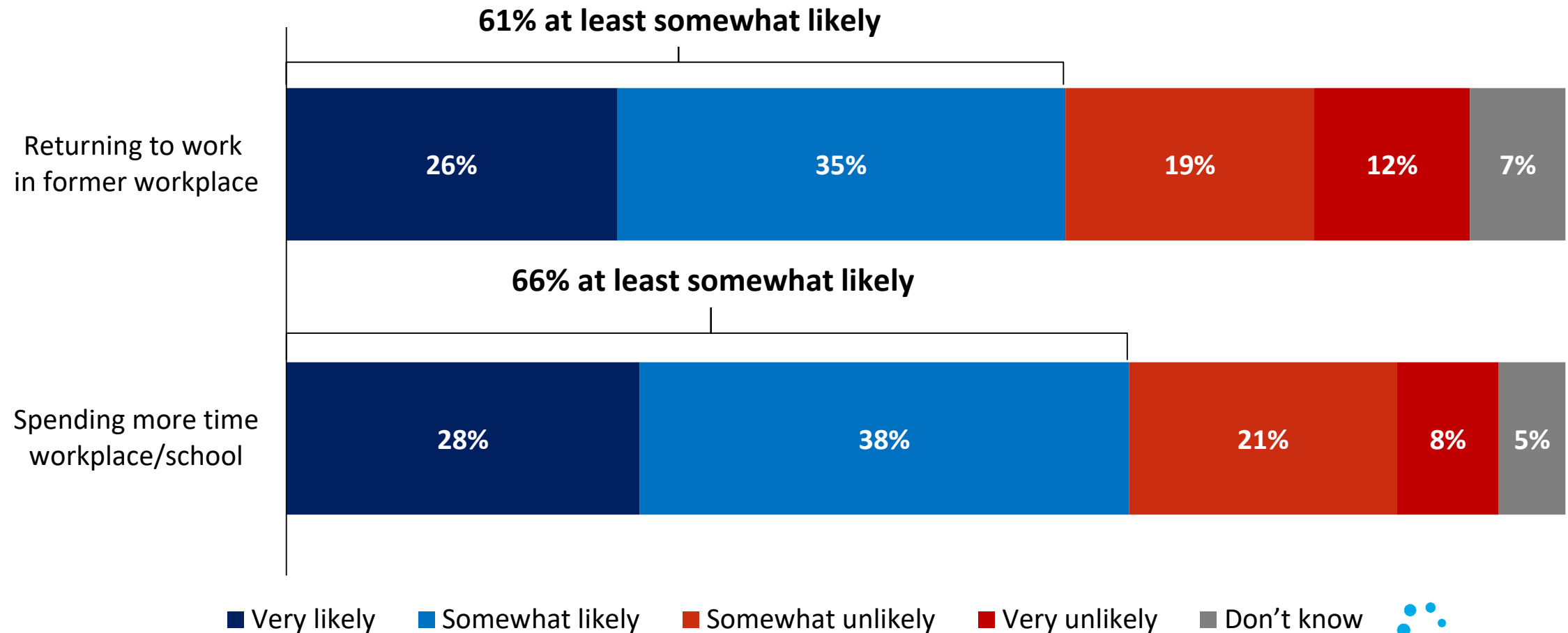


How likely do you think it is that you will be asked to return to work in your former workplace?

[asked of those who say they have been temporarily laid off due to COVID-19; n=70]

How likely do you think it is that at some point you will be asked to spend more time in your workplace/school?

[asked of those who are working/studying at home more now than in January; n=223]

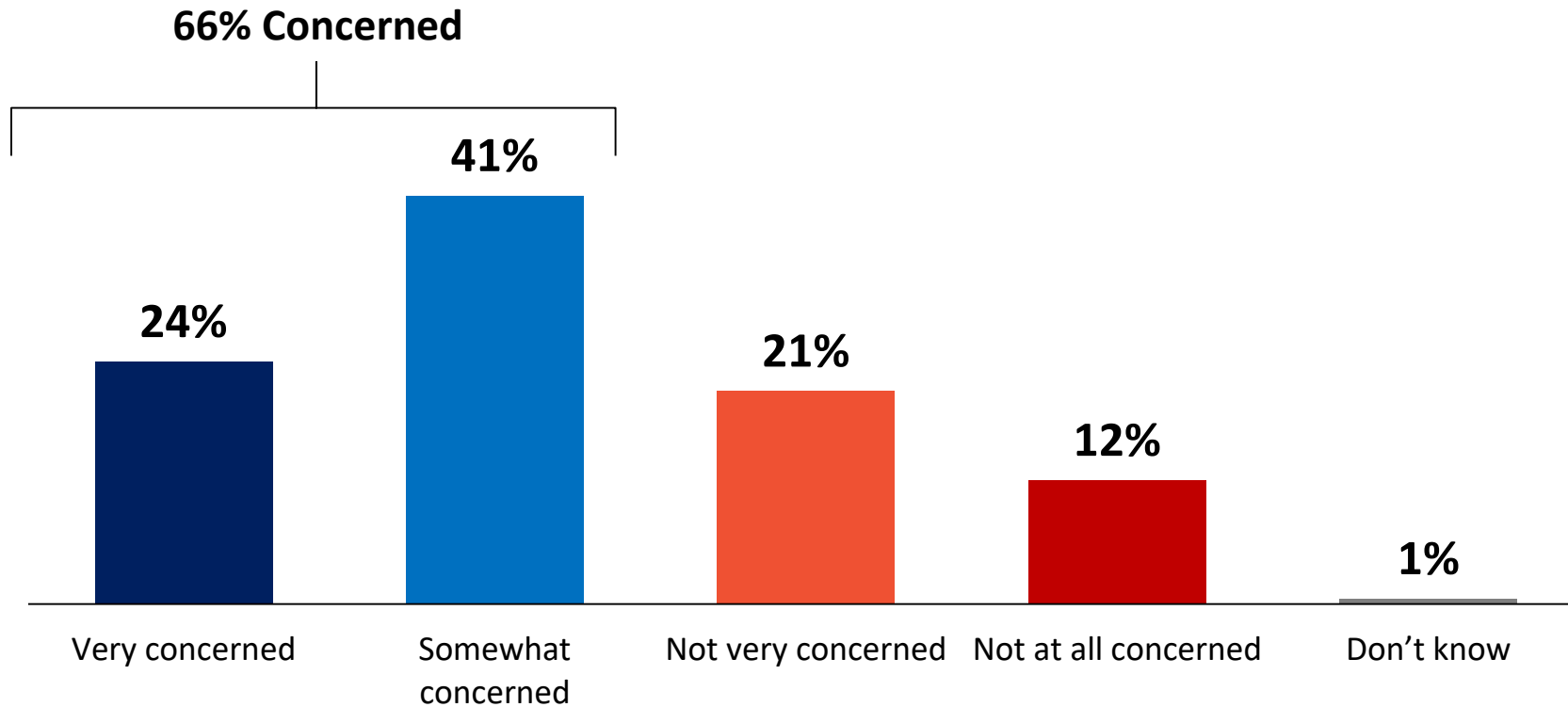


# Concern: Two-thirds of those who expect to be asked back to work say they are concerned of the risk of catching COVID-19 if they do



How concerned are you about the risk of catching COVID-19 if you have to go back to your school or workplace?

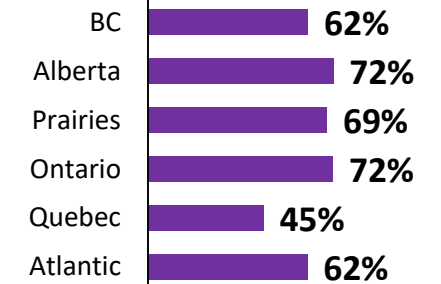
[asked of those who say it is likely they will be asked to return to work or school in person more often; n=189]



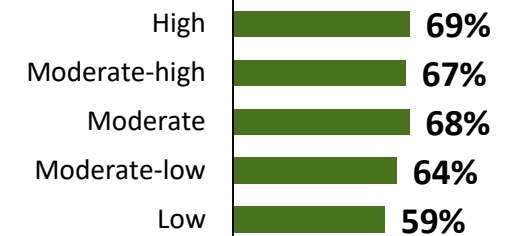
## Segmentation

Those who say 'concerned'

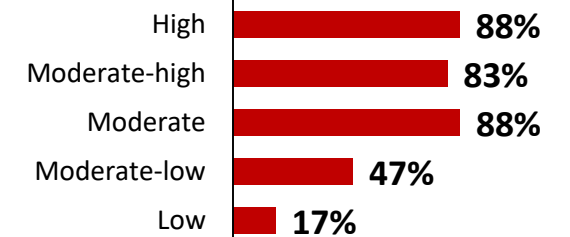
### Region



### General Anxiety



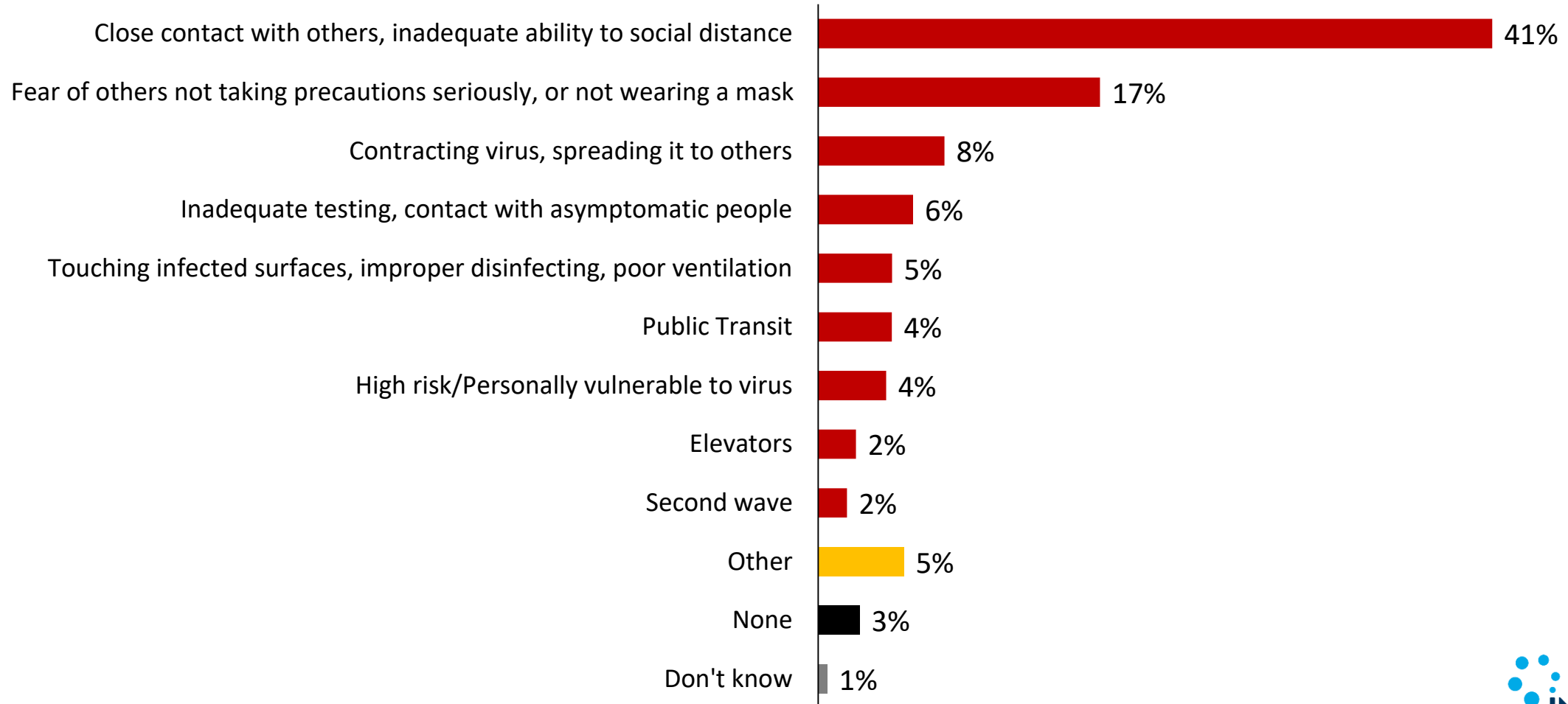
### COVID-19 Concern



# Specific Concern: Among those worried about returning to work or school, close contact and inability to social distance (41%) is the top issue



Thinking about returning to your school or workplace, what leaves you the most concerned you will be at risk of catching COVID-19? [OPEN]  
[asked of those who are concerned about catching COVID-19 at their school or workplace; n=124]



# Shopping and Banking in person

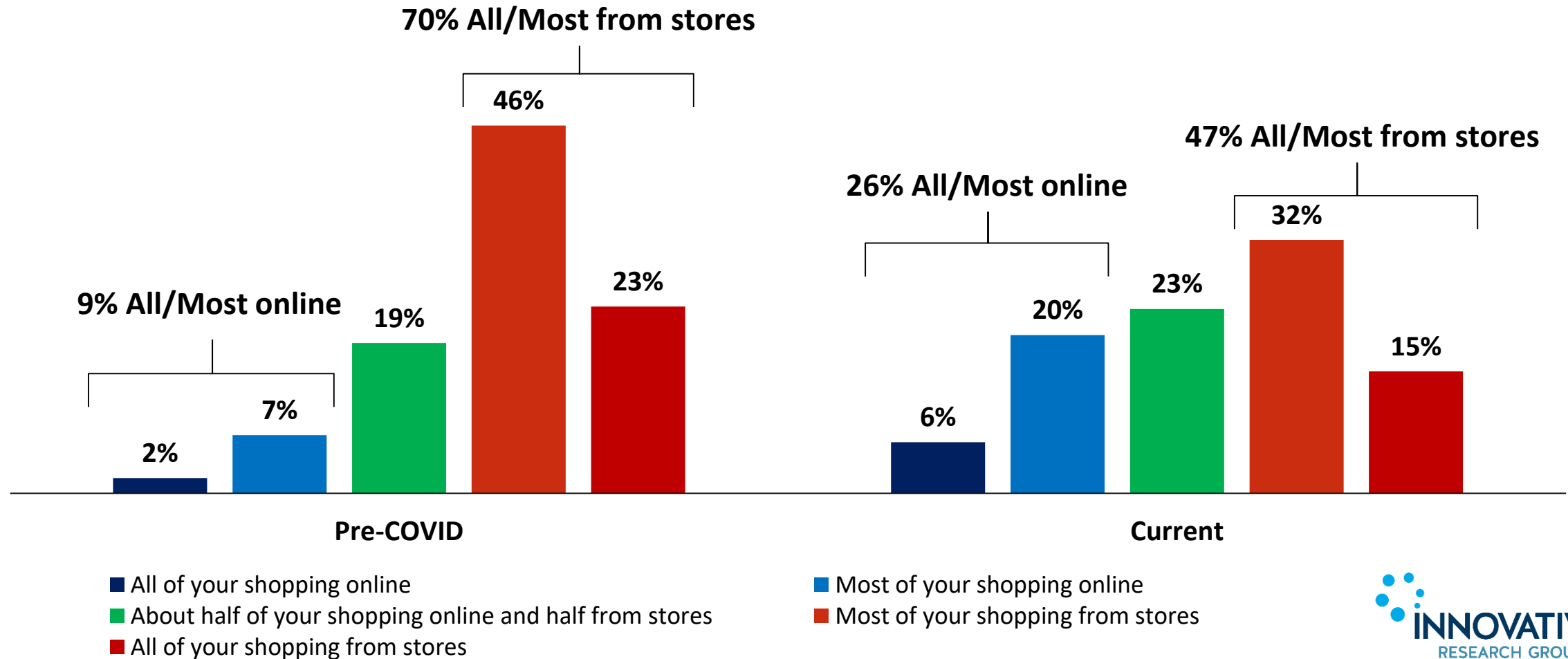
Canadians have shifted their shopping and banking behavior away from stores and towards online options. When asked if they intend to go back to doing those activities in person, a majority on both issues say that at most they will only partially revert to their old habits.

The change in shopping behaviour seems to be more fear based while banking changes are more about preferring online access.

# Online Shopping: More than a quarter (26%) say they now do all or most of their shopping online, up from only 9% before COVID-19



Before the COVID-19 outbreak started, would you say you did...? **AND**  
And now, would you say you do...?  
[asked of all respondents; n=1,200]



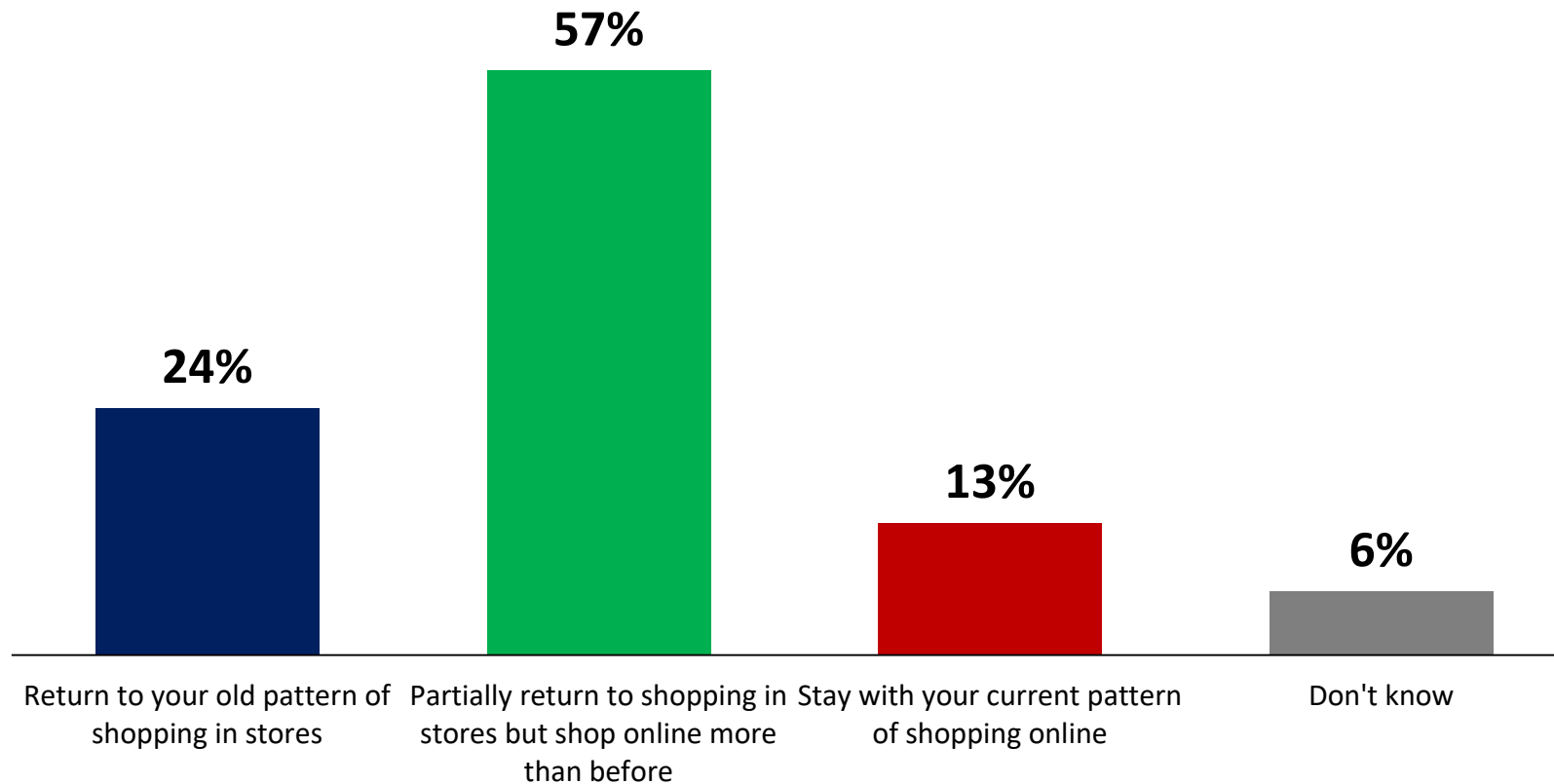


# Online Shopping – Future Plans: Less than 1-in-4 (24%) of those who changed say they will return to their old pattern of shopping in stores



Thinking about the future as businesses continue to reopen and restrictions continue to be lifted, will you...?

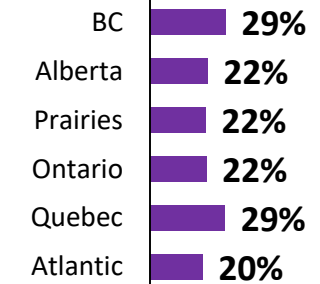
[asked of those who say they are shopping online more often than they did pre-COVID; n=497]



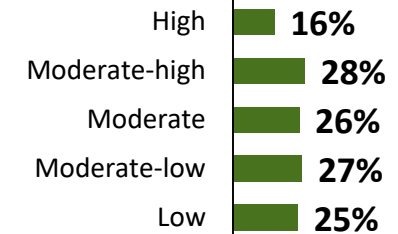
## Segmentation

Those who say 'Return to old pattern'

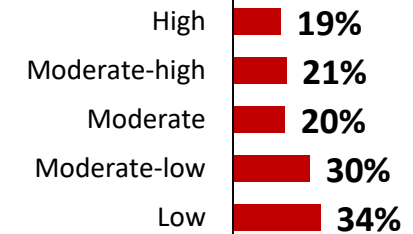
### Region



### General Anxiety



### COVID-19 Concern



# Change in Habits: Among those who did all of their shopping in-person before the pandemic, only 47% intend to return to that pattern



Thinking about the future as businesses continue to reopen and restrictions continue to be lifted, will you...? **By Pre-COVID Behaviour**

[asked of those who say they are shopping online more often than they did pre-COVID; n=497]

## Pre-COVID Behaviour

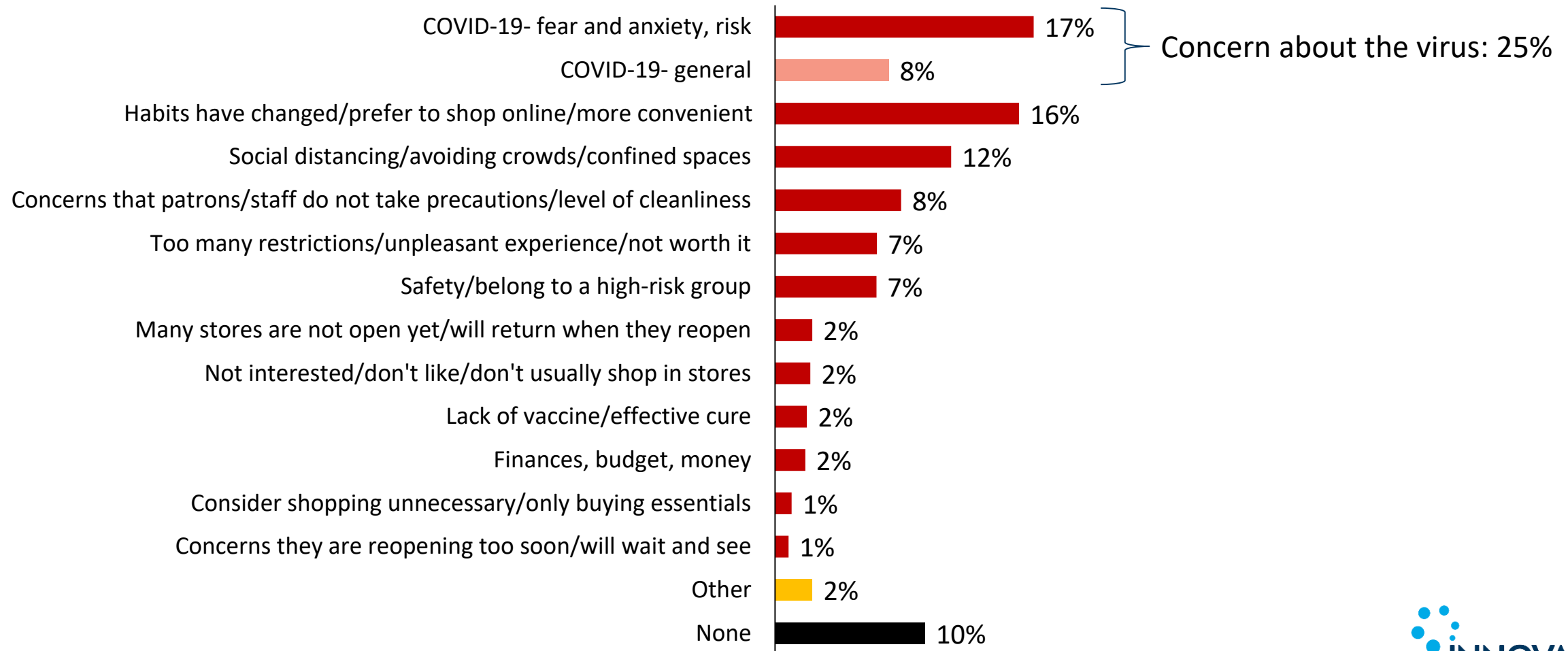
Future Plans	Showing Column %s	Mostly Online	Evenly Split	Mostly In-Person	All In-Person
	Return to your old pattern of shopping in stores		23%	12%	19%
Partially return to shopping in stores, but shop online more than before		51%	58%	64%	42%
Stay with your current pattern of shopping online		26%	25%	9%	6%
Don't Know		0%	6%	8%	5%

# Shopping Concern: Fears about COVID provide main reasons against in-person shopping but online convenience a significant stand-alone reason



Is there anything in particular that is holding you back from returning to your old pattern of shopping in stores? [OPEN]

[asked of those who plan to shop in stores less often; n=347]

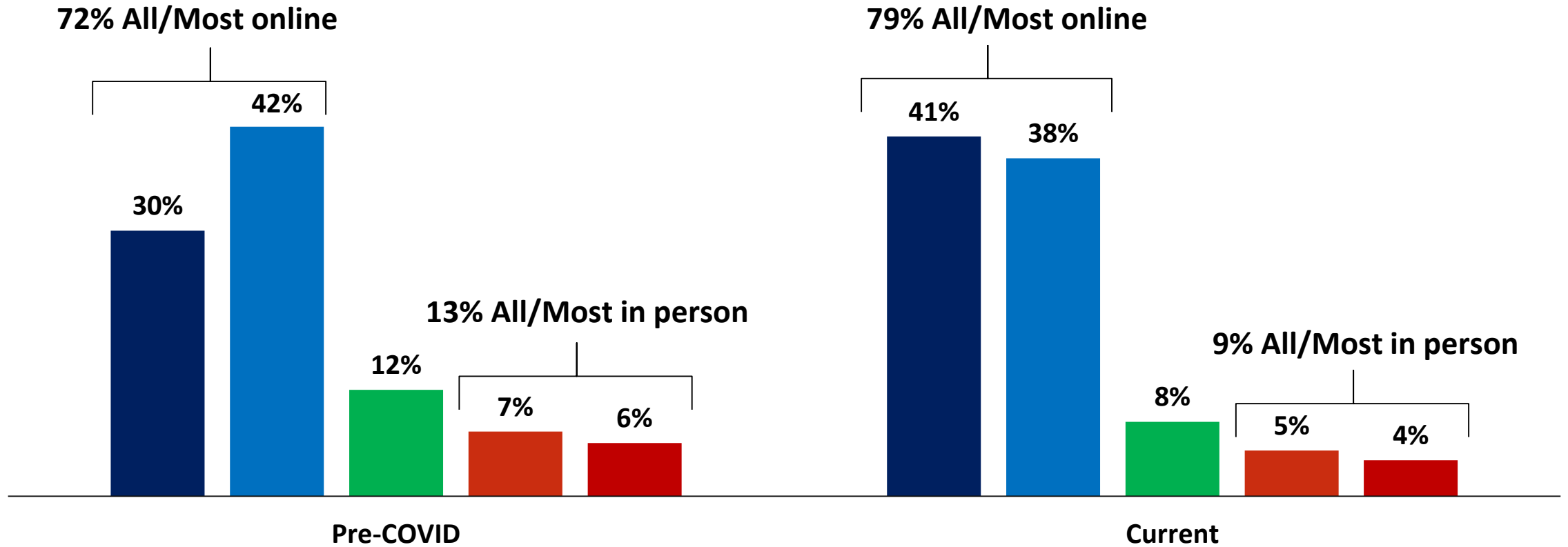


Note: 'Don't know' (<1%), 'Refused' (2%) not shown.

# Online Banking: Nearly 1-in-10 (9%) respondents say they still do most or all of their banking in person



Before the COVID-19 outbreak started, would you say you did...? **AND**  
And now, would you say you do...?  
[asked of all respondents; n=1,200]



- All of your banking online
- Most of your banking online
- About half of your banking online and half in person
- Most of your banking in person
- All of your banking in person



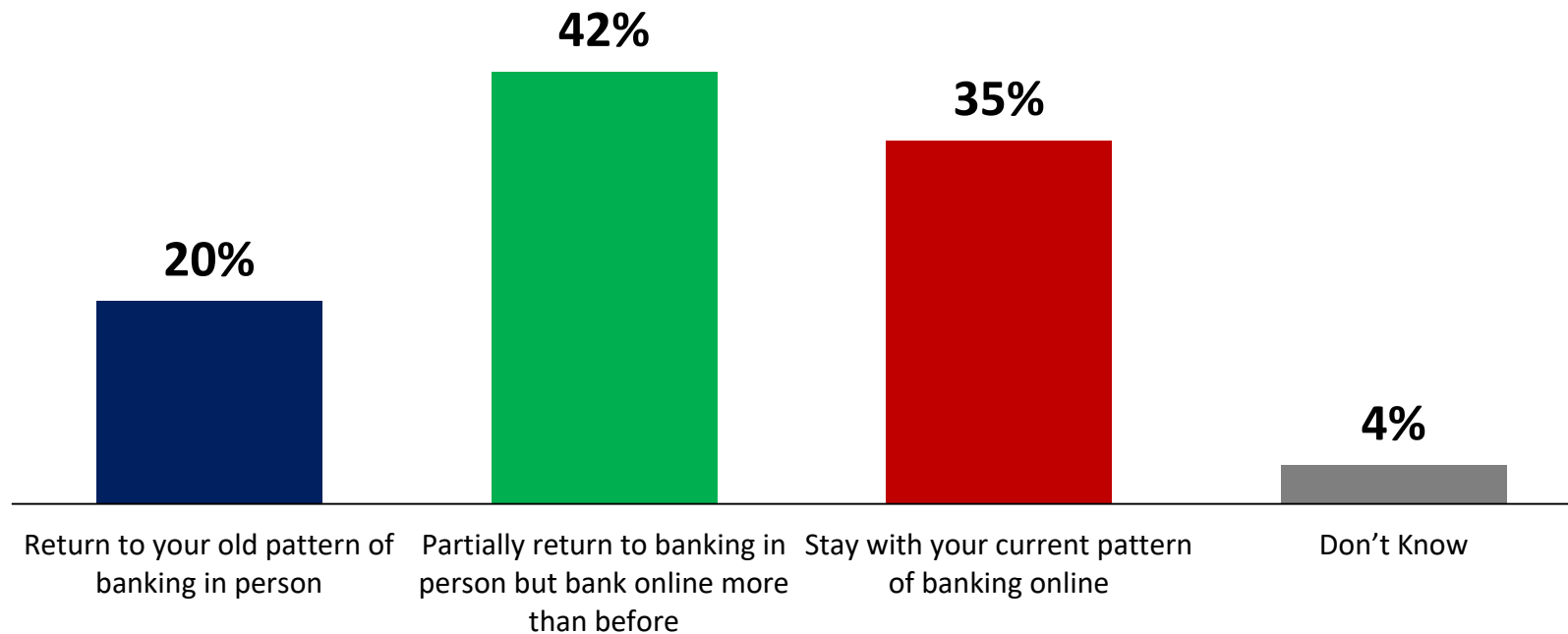
Note: 'Don't know' not shown.

# Online Banking – Future Plans: Only 20% of those who are banking more online say they will return to their old pattern of banking in person



Thinking about the future as banks continue to reopen and restrictions continue to be lifted, will you...?

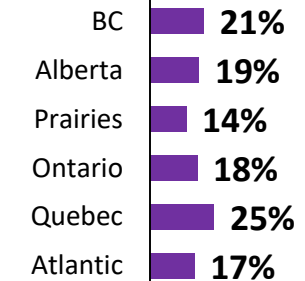
[asked of those who say they are banking online more often than they did pre-COVID; n=253]



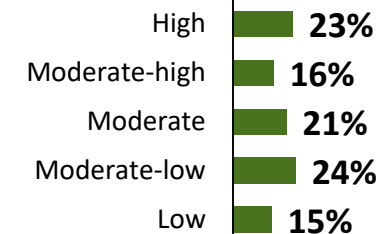
## Segmentation

Those who say 'return to your old pattern'

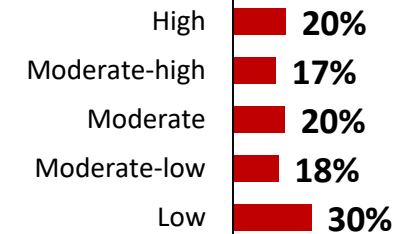
### Region



### General Anxiety



### COVID-19 Concern



# Change in Habits: Only a third of those who previously did all their banking in person plan to return to the bank



Thinking about the future as banks continue to reopen and restrictions continue to be lifted, will you...? **By Pre-COVID Behaviour**

[asked of those who say they are banking online more often than they did pre-COVID; n=253]

## Pre-COVID Behaviour

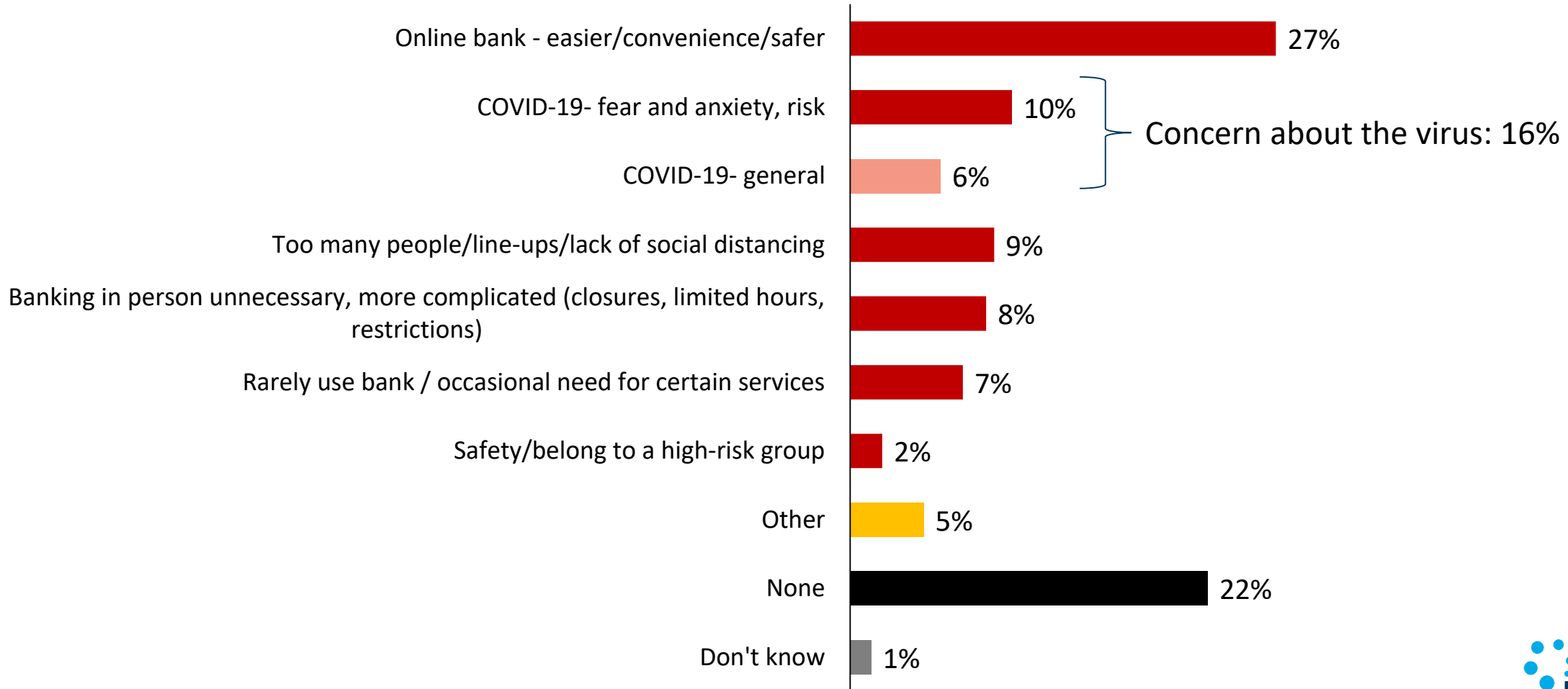
	Showing Column %s	Mostly Online	Evenly Split	Mostly In-Person	All In-Person
Future Plans	Return to your old pattern of banking in person	15%	23%	18%	35%
	Partially return to banking in person, but bank online more than before	35%	50%	50%	34%
	Stay with your current pattern of banking online	47%	24%	30%	24%
	Don't Know	3%	4%	2%	7%

# Banking Concern: 1-in-5 (22%) don't have anything 'holding them back';<sup>23</sup> for a plurality, it's just more convenient (27%) to bank online



Is there anything in particular that is holding you back from returning to your old pattern of banking in person? [OPEN]

[asked of those who plan to bank in person less often; n=195]



# Social Activity: Restaurants and Movies

Canadians have shifted their behavior dramatically since the start of the COVID-19 outbreak and many say they won't be returning to restaurants or movie theatres as frequently this summer.

For both activities, the top five reasons for not returning to past behaviour are all fear-related. Movie goers more worried about social distancing, restaurant patrons more worried about safety procedures and the behaviour of others.



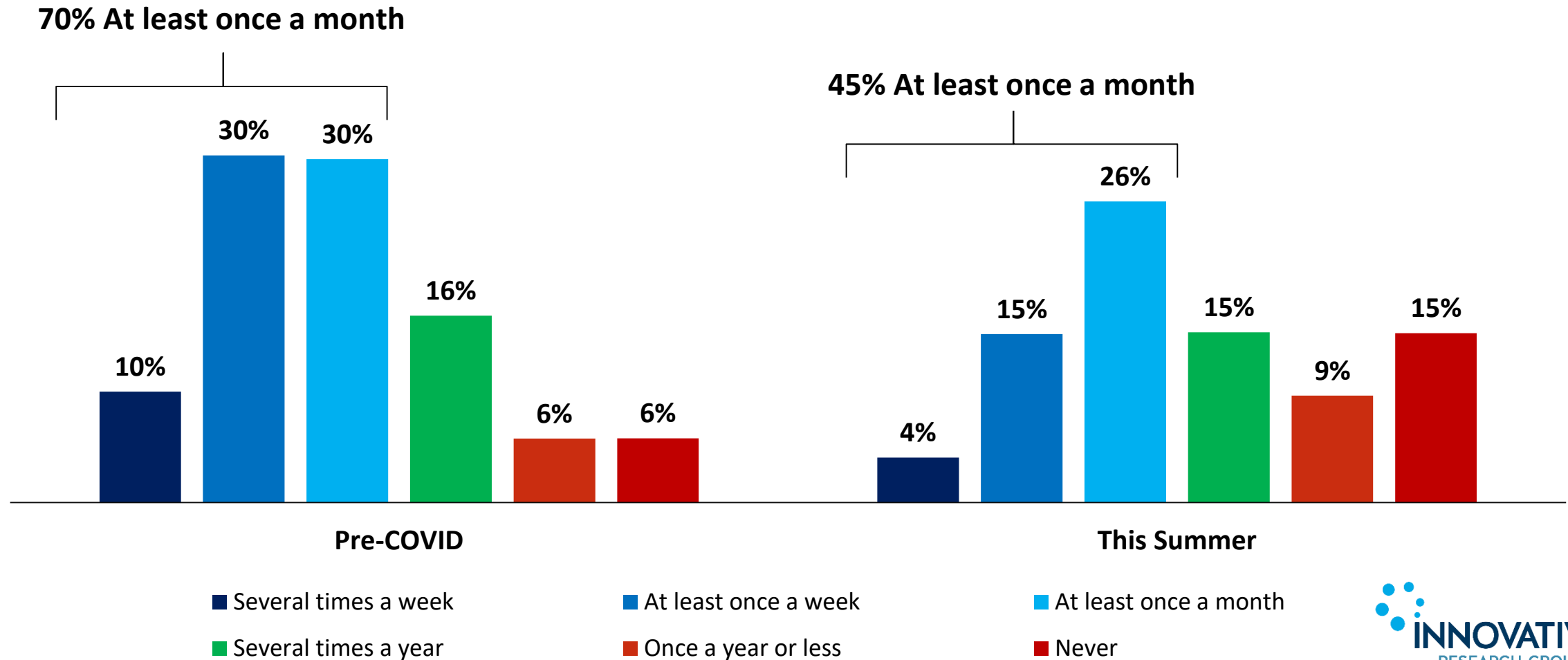
# Restaurants: Less than half (45%) say they will eat out at a restaurant at least once a month this summer



Before the COVID-19 outbreak started, how often did you go out to eat at restaurants? **AND**

Thinking about this summer when most restaurants will have reopened, how often do you expect you will go out to eat at them?

[asked of all respondents; n=1,200]



# Change in Habits: Among those who ate out most frequently, only 25% say they will return to that behaviour this summer



Thinking about this summer when most restaurants will have reopened, how often do you expect you will go out to eat at them? **By Pre-COVID Behaviour**

[asked of all respondents, n=1,200]

## Pre-COVID Behaviour

Behaviour in the Summer

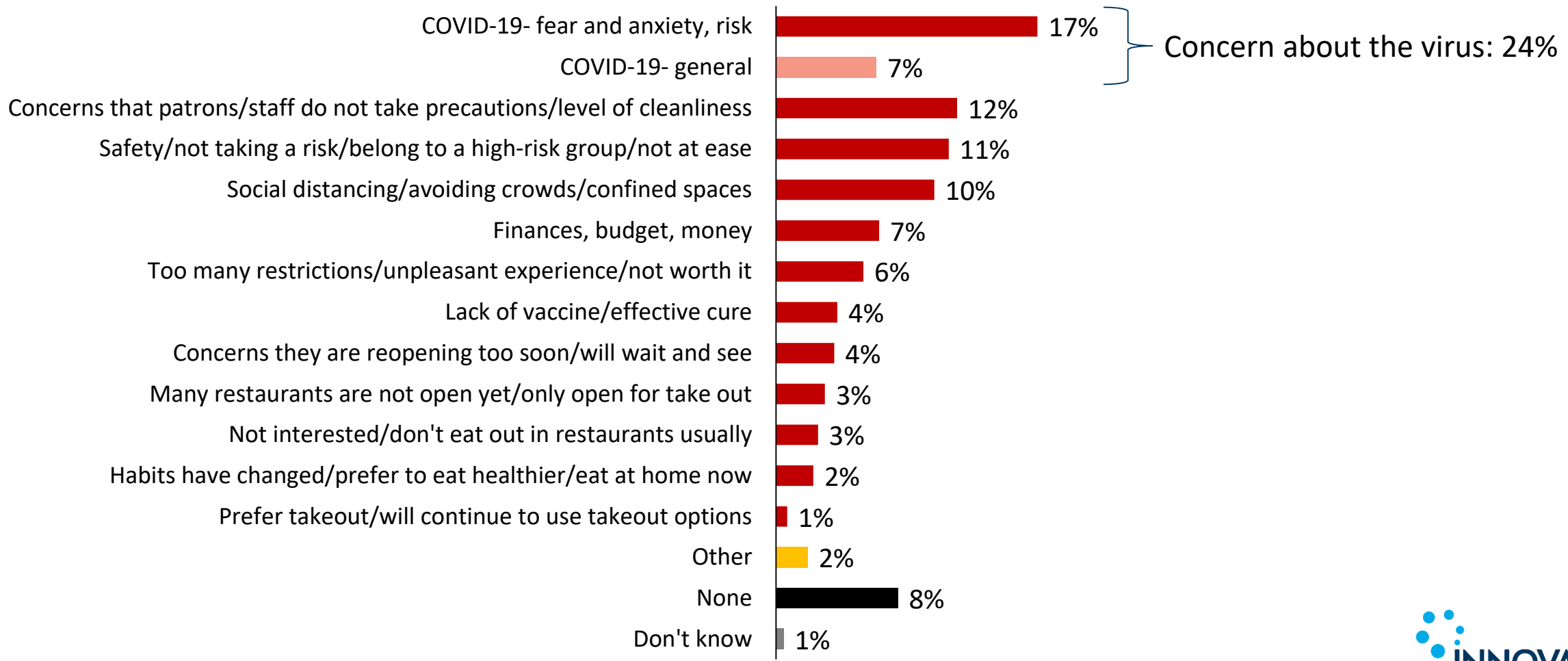
Showing Column %s	Several times a week	At least once a week	At least once a month	Several times a year	Once a year or less	Never
Several times a week	25%	3%	0%	1%	5%	1%
At least once a week	30%	30%	7%	3%	0%	3%
At least once a month	18%	34%	38%	10%	1%	21%
Several times a year	4%	6%	19%	37%	5%	9%
Once a year or less	2%	3%	7%	16%	47%	11%
Never	11%	10%	13%	19%	25%	41%
Don't know	11%	14%	16%	13%	16%	14%

# Restaurant Concern: 1-in-4 (24%) cite the virus specifically as the reason they won't return, followed by concerns about others taking precautions



Is there anything in particular that is holding you back from returning to your old pattern of eating out at restaurants? [OPEN]

[asked of those who plan to go out to a restaurant less often; n=499]



Note: 'Refused' (2%) not shown.



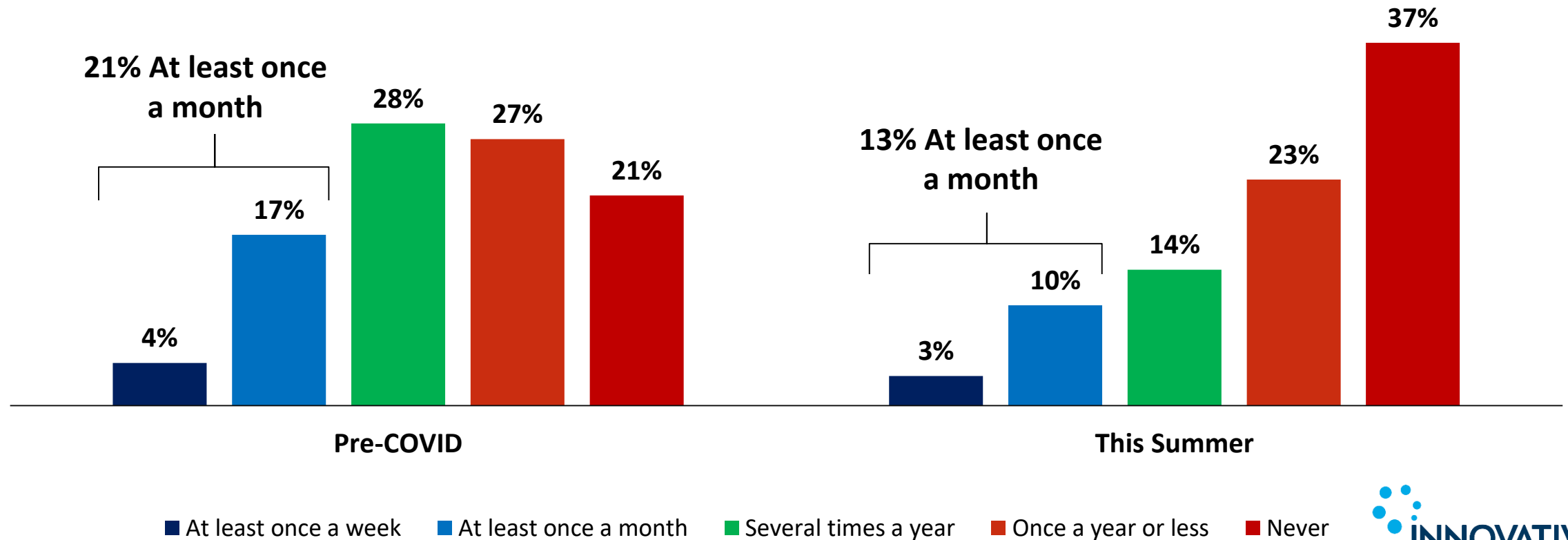
# Movies: Nearly 4-in-10 (37%) say they will never go out to see movies in theatres this summer, up from only 21% before the pandemic



Before the COVID-19 outbreak started, how often did you go out to watch movies in theatres? **AND**

Thinking about this summer when most movie theatres will have reopened, how often do you expect you will go out to watch movies in theatres?

[asked of all respondents; n=1,200]



# Change in Habits: Among the most frequent moviegoers, less than 40% expect to go back to normal



Before the COVID-19 outbreak started, how often do you expect go out to watch movies in theatres? **By Pre-COVID Behaviour**  
[asked of all respondents; n=1,200]

## Pre-COVID Behaviour

Behaviour in the Summer

Showing Column %s	At least once a week	At least once a month	Several times a year	Once a year or less	Never
At least once a week	36%	5%	1%	0%	0%
At least once a month	34%	38%	5%	2%	1%
Several times a year	7%	17%	32%	4%	2%
Once a year or less	4%	9%	22%	51%	5%
Never	8%	15%	24%	29%	90%
Don't Know	11%	16%	16%	14%	3%

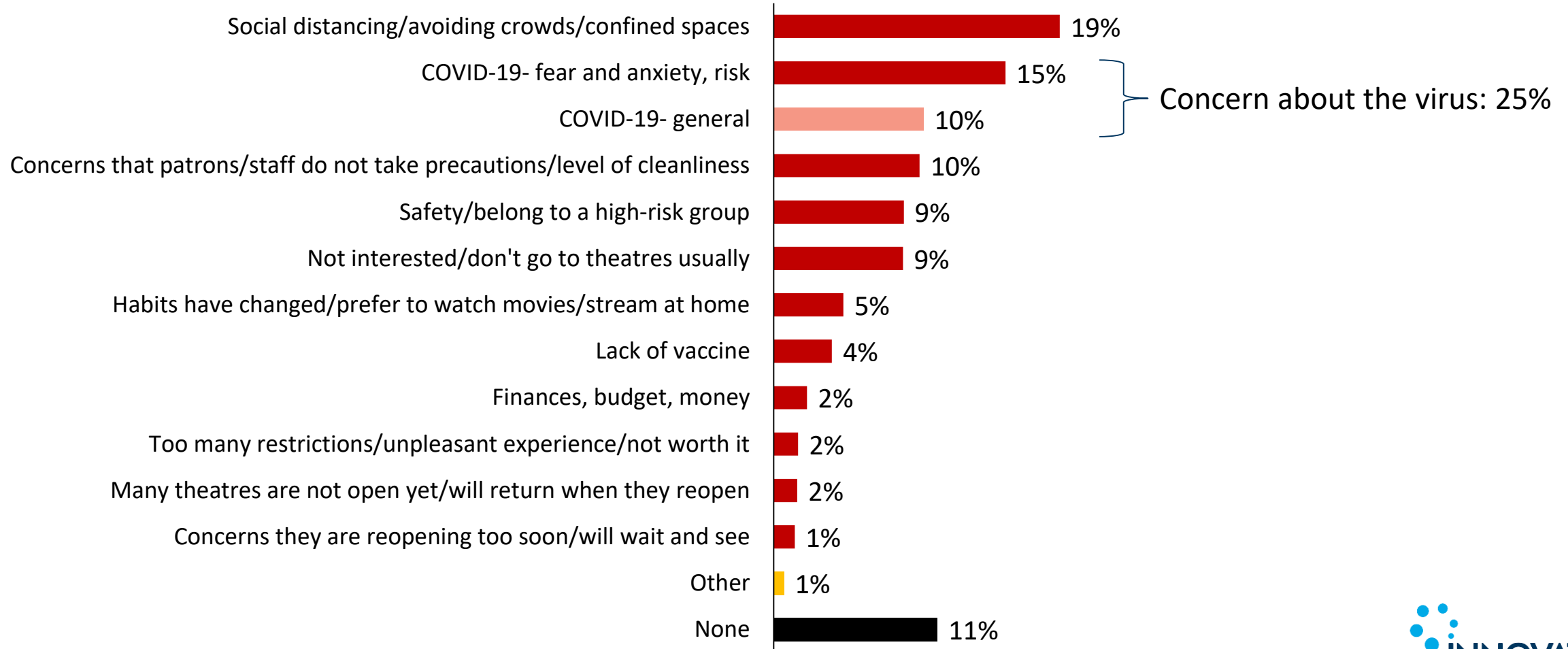


Note: Due to small n-size (n<30), those who say 'don't know' when asked if they used to go out to watch movies in theatres are not shown.

# Theatres Concern: When it comes to a return to movie theatres, ability to social distance in large crowds (19%) tops key concerns



Is there anything in particular that is holding you back from returning to your old pattern of going out to watch movies in theatres? [OPEN]  
[asked of those who plan to go out to a movie theatre less often; n=362]



Note: 'Don't know' (<1%), 'Refused' (2%) not shown.

# Flying

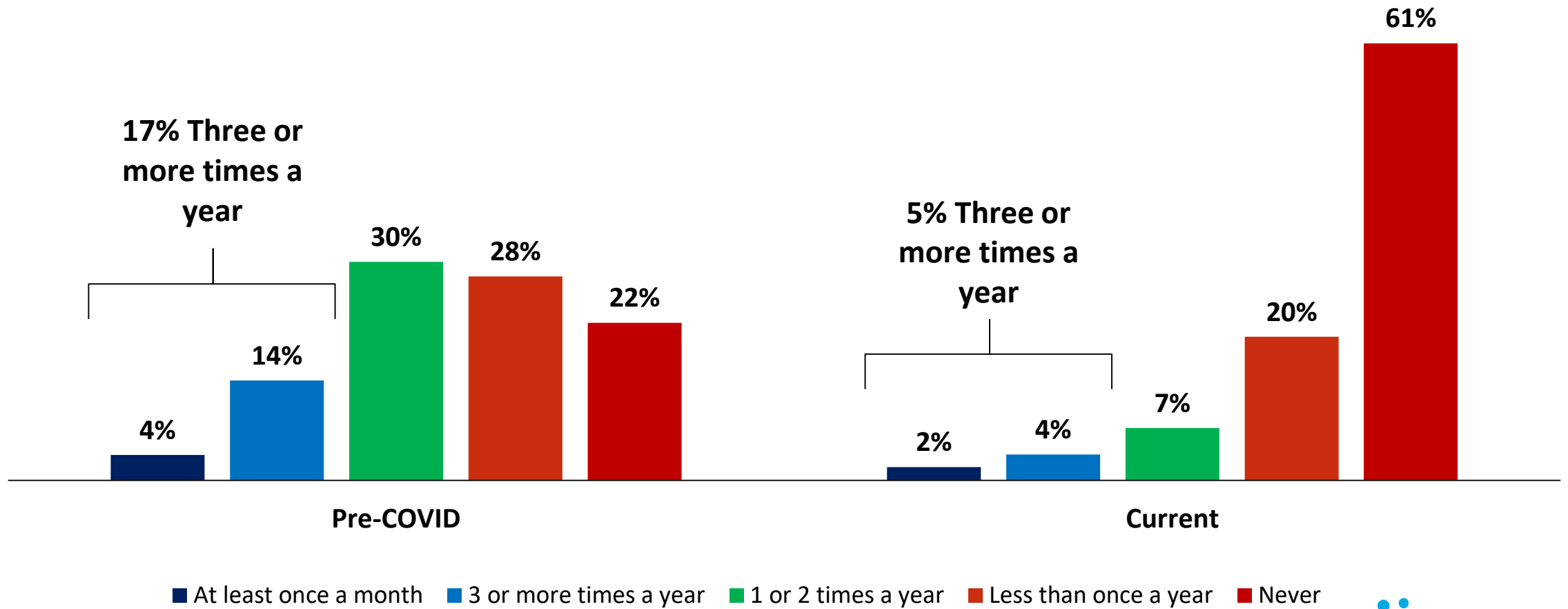
More than half of Canadians don't intend to travel by plane even as travel restrictions are eased.

While fear of COVID-19 is the key barrier, a significant number mention lack of funding, opportunity or need to fly.

# Flying: The majority (61%) of respondents say that they never travel by plane now



Before the COVID-19 outbreak started, on average, how frequently do you travel by plane? **AND**  
On average, how frequently do you travel by plane now?  
[asked of all respondents; n=1,200]



Note: 'Don't know' not shown.

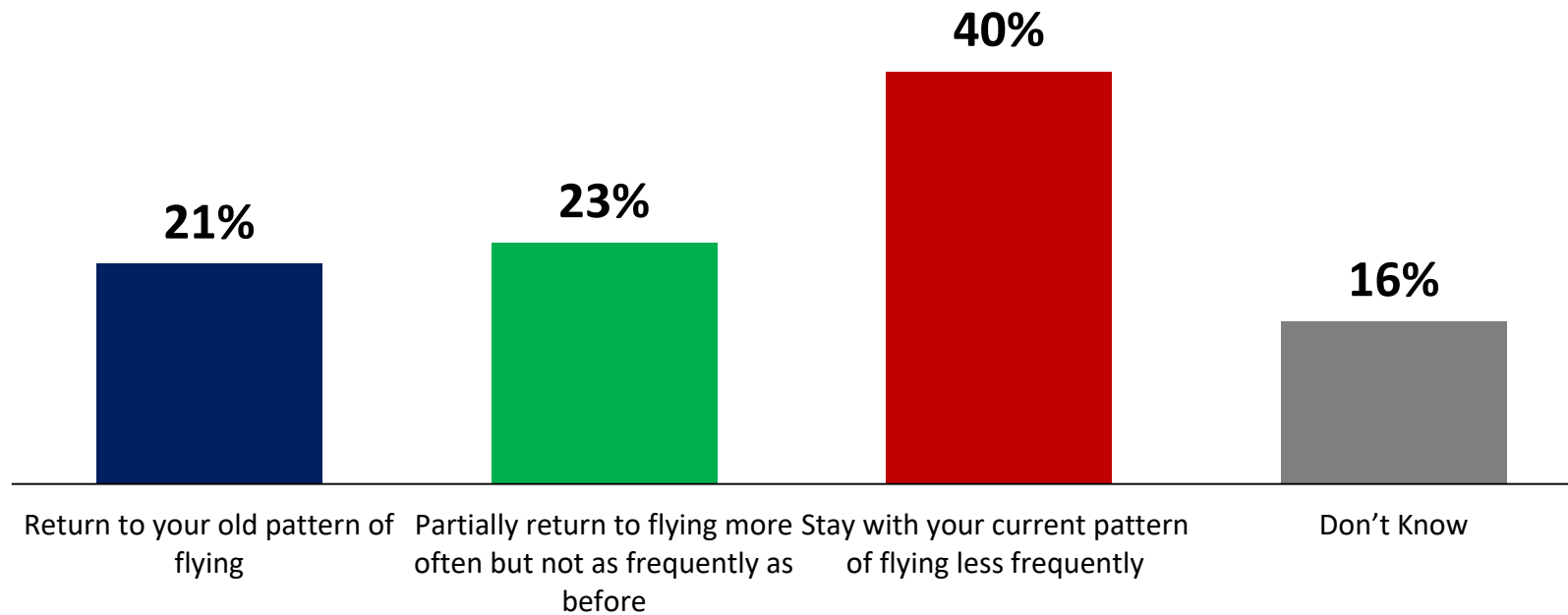


# Flying— Future Plans: Four-in-ten say that they will continue with their current pattern of flying less, even as travel restrictions are lifted



Thinking about the future as travel restrictions continue to be lifted, will you...?

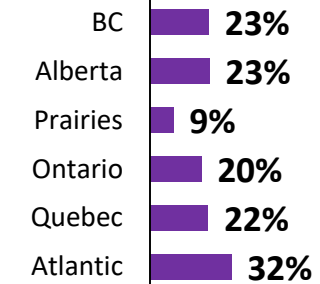
[asked of those who say they are flying less often than they did pre-COVID; n=593]



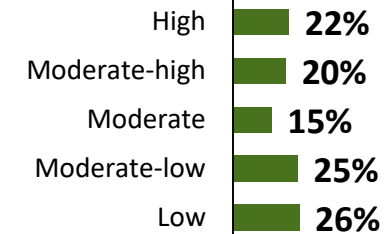
## Segmentation

Those who say 'return to your old pattern'

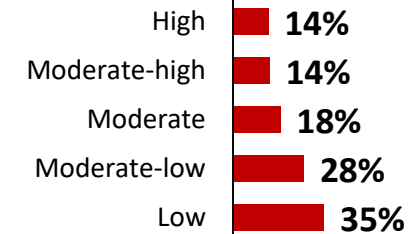
### Region



### General Anxiety



### COVID-19 Concern



# Change in Habits: Regardless of pre-COVID plane travel habits, a majority of respondents expect only a partial return to flying



Thinking about the future as travel restrictions continue to be lifted, will you...? **By Pre-COVID Behaviour**

[asked of those who say they are flying more often than they did pre-COVID; n=593]

## Pre-COVID Behaviour

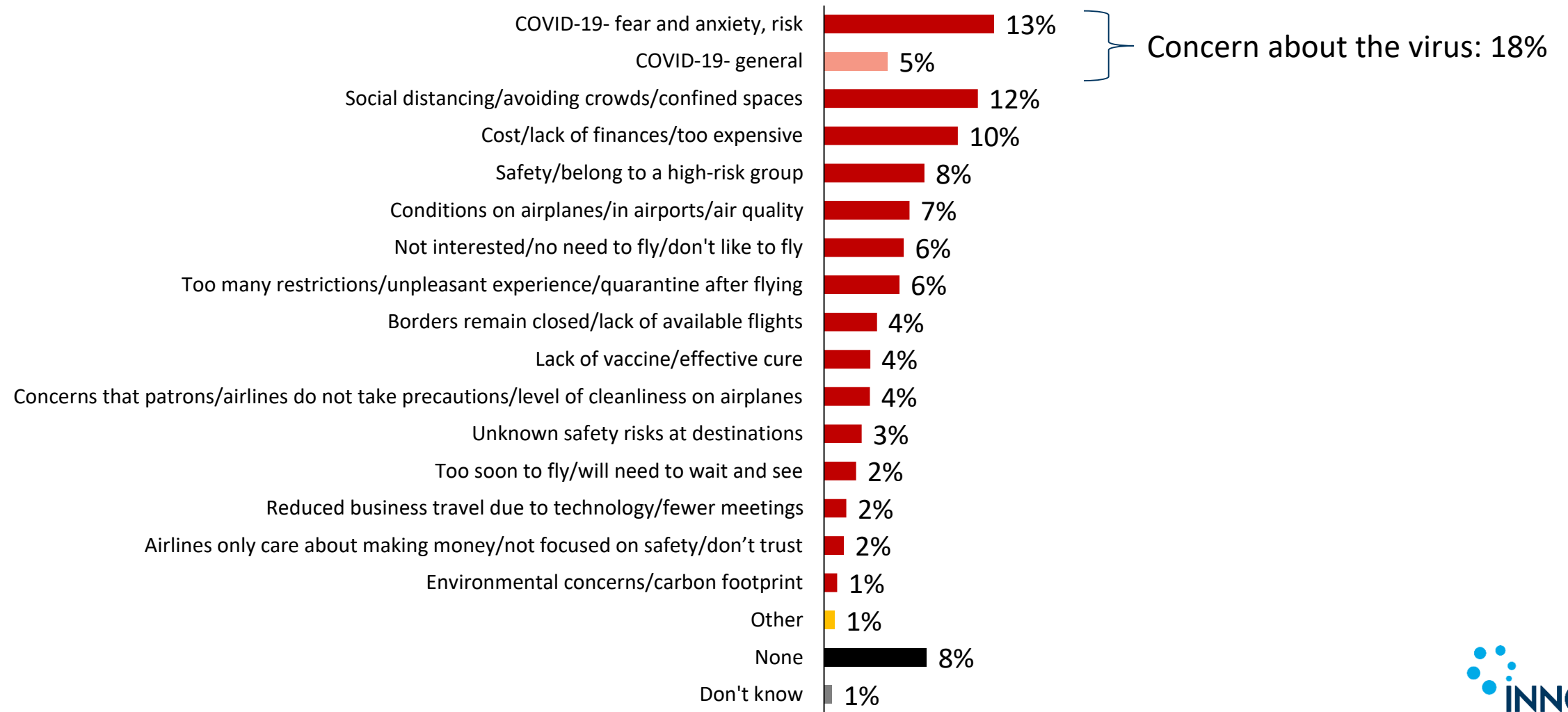
Future Plans	Showing Column %s	At least once a month	3 or more times a year	1 or 2 times a year	Less than once a year
	Return to your old pattern of flying		16%	30%	23%
Partially return to flying more often, but not as frequently as before		60%	31%	25%	9%
Stay with your current pattern of flying less frequently		13%	28%	38%	55%
Don't Know		11%	11%	14%	22%

# Flying Concern: Other than general concern about the virus (18%), social distancing and safety are the main deterrents from flying



Is there anything in particular that is holding you back from returning to your old pattern of flying? [OPEN]

[asked of those who plan to fly less often; n=374]



Note: 'Refused' (2%) not shown.



# Methodology

# Survey Methodology

**These are the results of an online survey conducted between June 19<sup>th</sup> and 23<sup>rd</sup>, 2020.**

**Method:** This online survey was conducted using INNOVATIVE's Canada 20/20 national research panel with additional respondents from Lucid, a leading provider of online sample. Each survey is administered to a series of randomly selected samples from the panel and weighted to ensure that the overall sample's composition reflects that of the actual Canadian population according to Census data to provide results that are intended to approximate a probability sample.

**Sample Size:** n=2,115 Canadian citizens, 18 years or older. Regional oversamples in Alberta and BC were used in order to adequately capture perspective on those provinces. The results are nationally weighted to n=1,200 based on Census data from Statistics Canada.

**Field Dates:** June 19th and 23rd, 2020.

**Weighting:** Results for Canada are weighted by age, gender, and region to ensure that the overall sample's composition reflects that of the actual population according to Census data; in order to provide results that are intended to approximate a probability sample. Weighted and unweighted frequencies are reported in the table.

**Margin of Error:** This is a representative sample. However, since the online survey was not a random probability based sample, a margin of error cannot be calculated. Statements about margins of sampling error or population estimates do not apply to most online panels.

**Note:** Graphs may not always total 100% due to rounding values rather than any error in data. Sums are added before rounding numbers.

	Unweighted (n)	Unweighted (%)	Weighted (n)	Weighted (%)
<b>Males 18-34</b>	190	9%	165	13.8%
<b>Males 35-54</b>	254	12%	201	16.7%
<b>Males 55+</b>	666	31.5%	217	18.1%
<b>Females 18-34</b>	200	9.5%	163	13.6%
<b>Females 35-54</b>	287	13.6%	208	17.4%
<b>Females 55+</b>	518	24.5%	245	20.4%
<b>Region</b>				
<b>BC</b>	384	18.2%	163	13.6%
<b>AB</b>	312	14.8%	136	11.3%
<b>Prairies</b>	114	5.4%	80	6.7%
<b>ON</b>	838	39.7%	459	38.3%
<b>QC</b>	336	15.9%	280	23.3%
<b>Atlantic</b>	126	6%	82	6.8%



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**Building Understanding.**