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A REPORT TO CIRA

COVID-19 Online Behaviours and Attitudes

April 2020

About the Research

BACKGROUND

The Strategic Counsel is pleased to provide CIRA with the following report of findings from a survey of Canadians about changes in online behaviours and attitudes as a result of the COVID-19 pandemic.

Topics include:

- Working from home
- Satisfaction with home internet service
- Online shopping habits
- Level of support for Canadian businesses
- Leisure activities and staying in touch with family & friends

METHODOLOGY

An online panel methodology was used to survey a total of n=1,200 Canadian internet users (18-79 years of age) between the dates of April 3 - 7, 2020.

The total sample is proportionate to population by gender, age and province.

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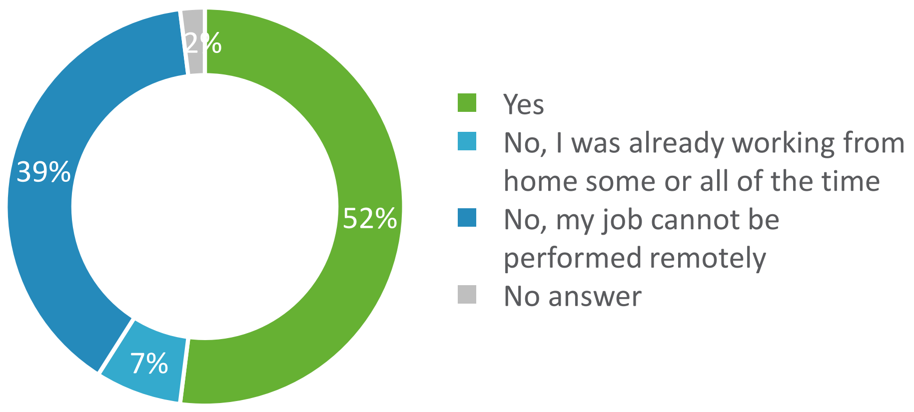
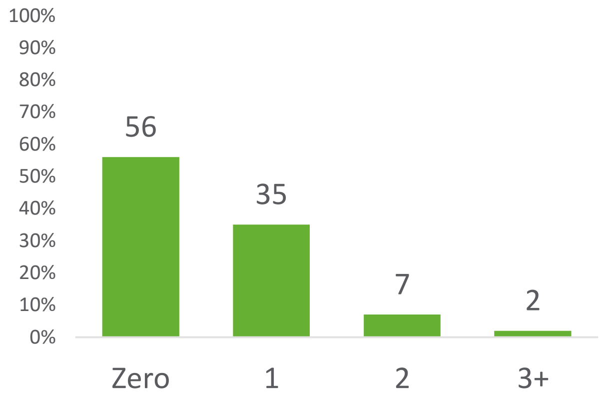
DETAILED FINDINGS

Just over half (52%) of those who are employed say that they are working from home as a result of the pandemic (7% were already working from home).

Working at home as a result of COVID-19?



Others in household working from home as a result of COVID-19



Q5.	Are you working from home as a result of the COVID-19 pandemic?
Base:	Working full or part time (n=692)
Q8.	How many other people in your household are working from home as a result of the COVID-19 pandemic?
Base:	Those with >1 person in HH (n=964)

Two-thirds (67%) of those currently working from home because of COVID-19 say that they rarely or never did prior to the pandemic.

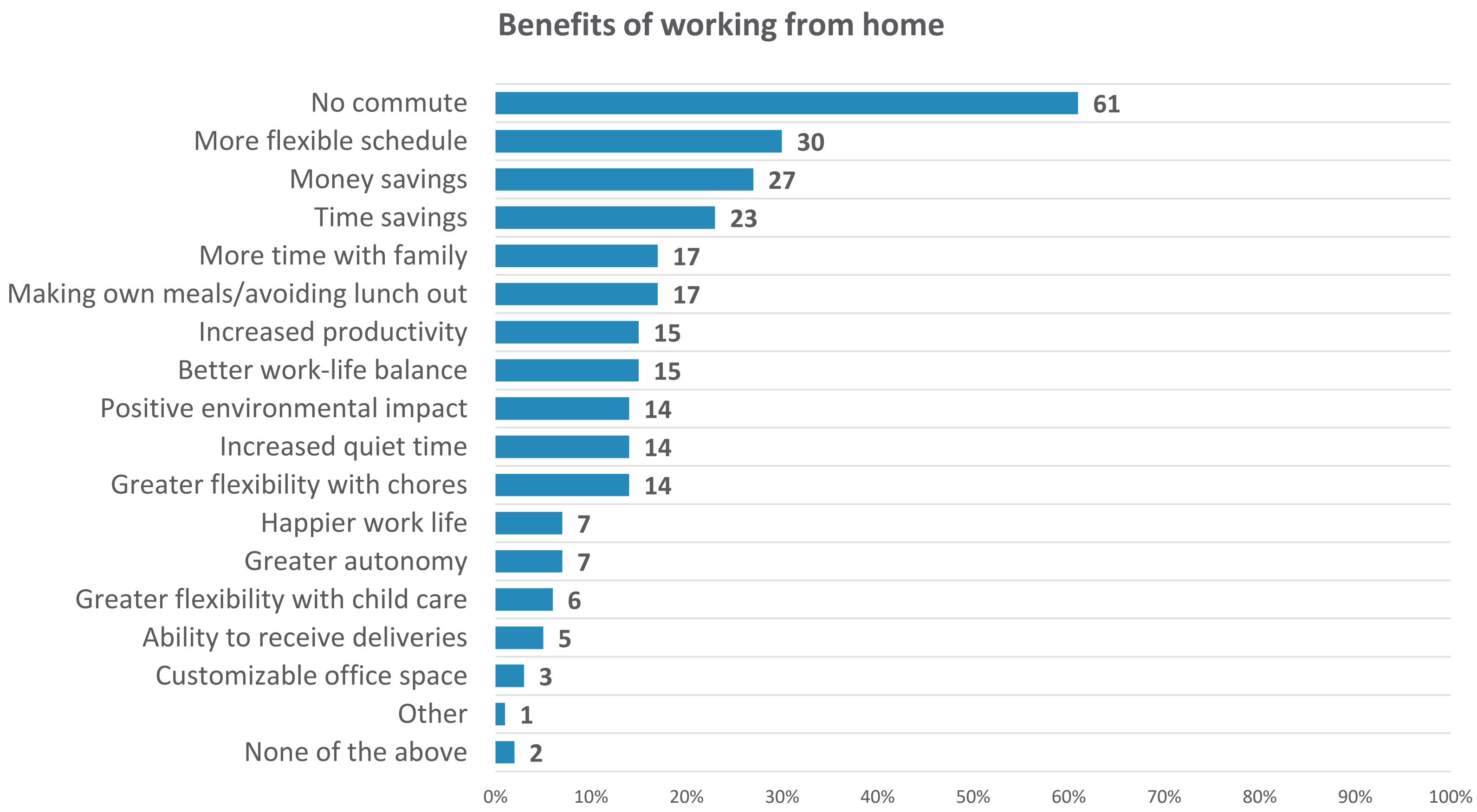
Frequency of working from home prior to COVID-19

		Working at home because of COVID-19	Worked at home before COVID-19	Others in Household
TOTAL ALWAYS/MOST OF THE TIME	15	8%	63%	6%
Always or almost always	7	4%	33%	4%
Most of the time	8	4%	29%	2%
Some of the time	25	24%	29%	8%
Rarely	27	30%	--	10%
Never	33	37%	8%	57%
TOTAL RARELY/NEVER	60	67%	8%	66%

0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%

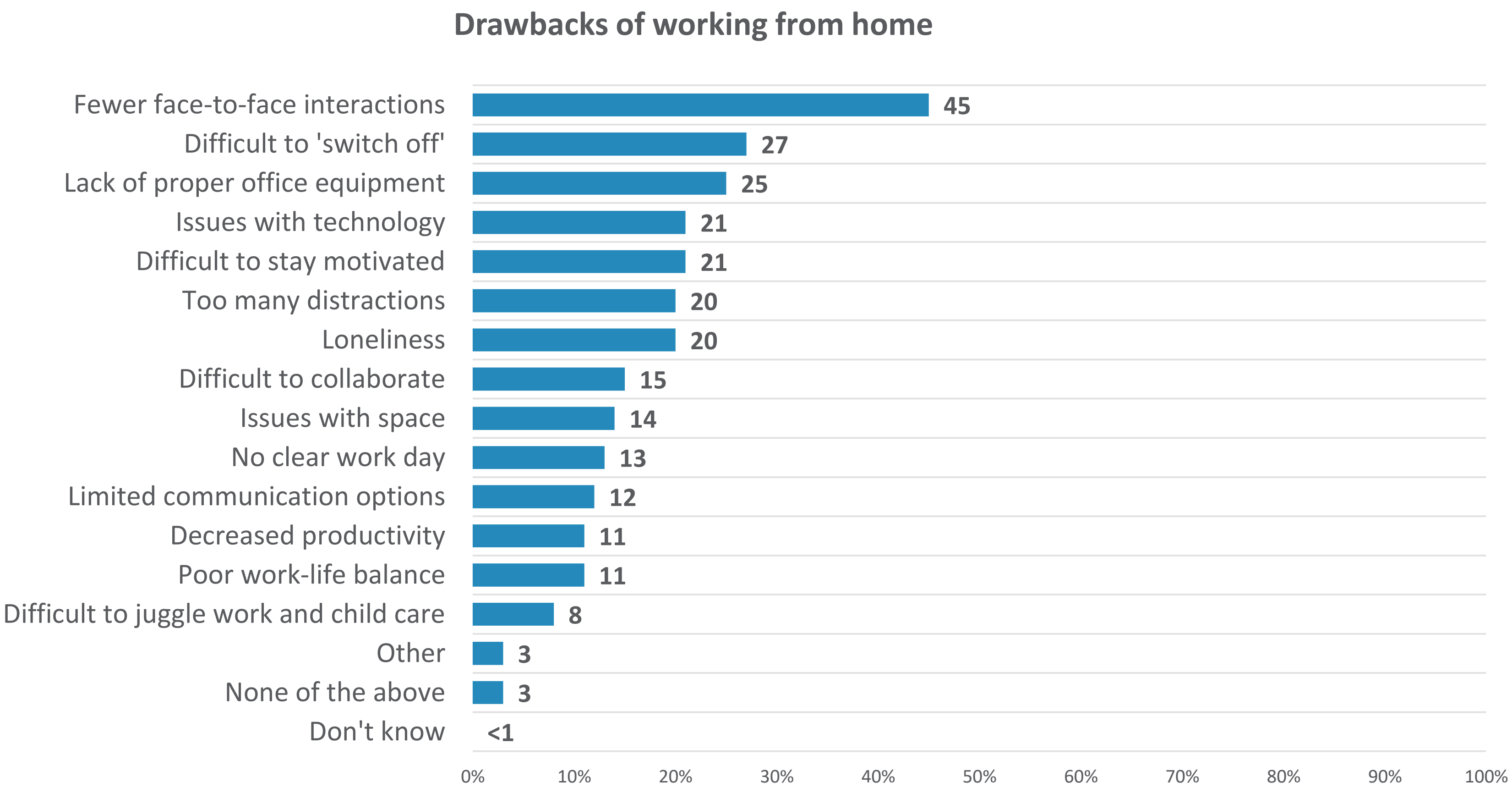
Q6. Prior to the COVID-19 pandemic, how often did you work from home?
Base: Work from home some or all of the time (n=409)
Q10. And how often did others in your household work from home prior to the COVID-19 pandemic?
Base: One or more people in household working from home as a result of COVID-19 (n=1807 – sum of mentions))

Having no commute is by far the biggest perceived benefit of working from home. A more flexible schedule, money savings, and time savings are also high on the list.



Q11. Listed below are different possible benefits of working from home. Please select up to 3 of the most important benefits for you personally.
Base: Work from home some or all of the time (n=409)

Fewer face-to-face interactions is the biggest drawback of working from home. Difficulties 'switching off' and lack of proper office equipment are also among the top mentions.

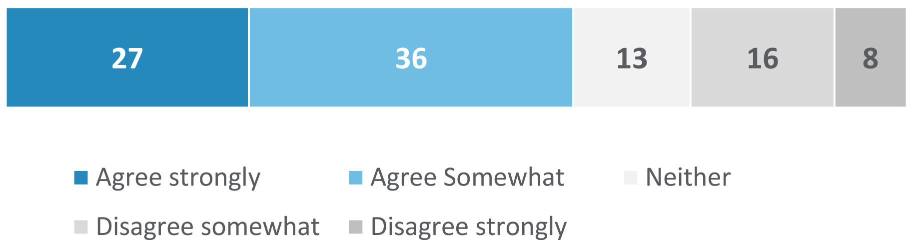


Q12. Listed below are different possible drawbacks of working from home. Please select up to 3 of the drawbacks for you personally.
Base: Work from home some or all of the time (n=409)

PREPAREDNESS TO WORK FROM HOME AS A RESULT OF COVID-19

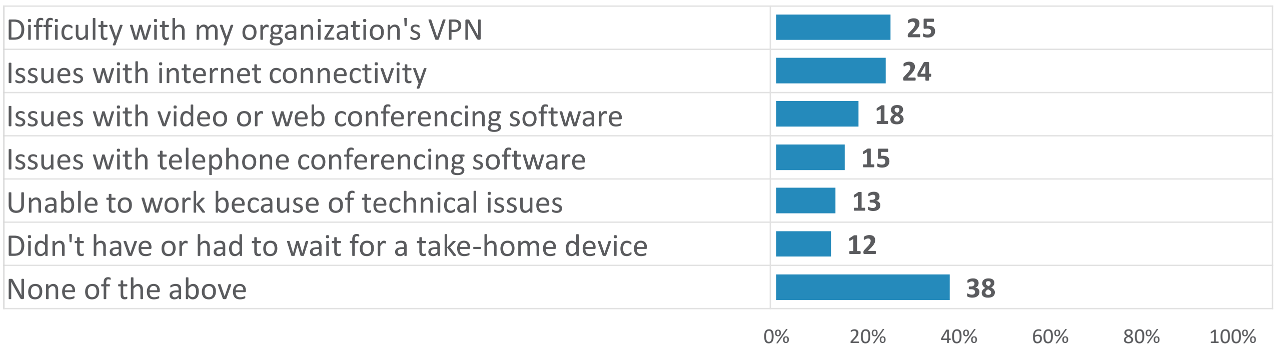
63% of those working from home as a result of COVID-10 agree that their workplace was well-prepared. However, 62% have experienced some difficulty, most commonly with the VPN or internet connectivity. About one-quarter (26%) do not have a dedicated workspace at home.

"My workplace was well-prepared to have employees work remotely"



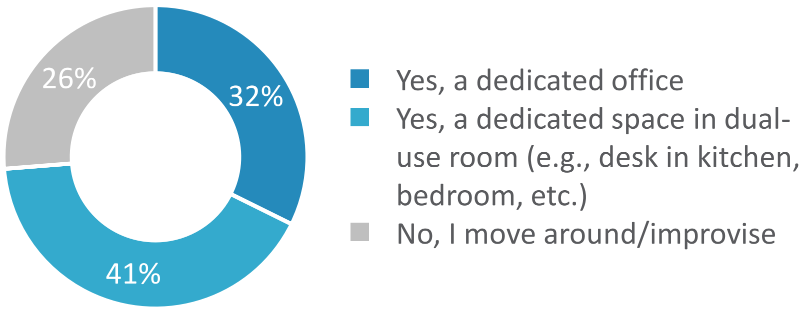
Difficulties experienced as a result of working from home

62%
Have experienced some difficulty



73%
Have dedicated workspace at home

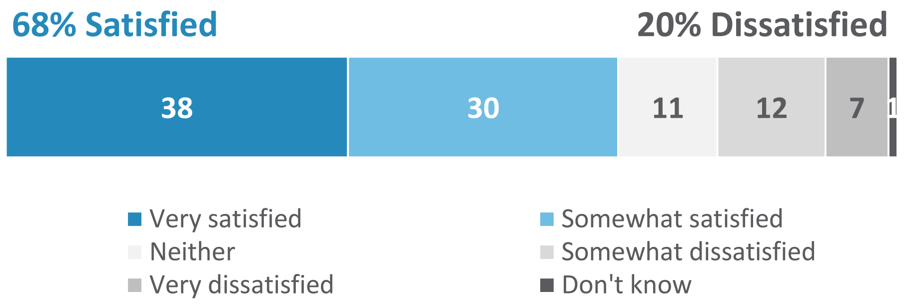
26%
Move around/improvise



Q13. How much do you agree or disagree with the following statement about working from home as a result of the COVID-19 pandemic? Base: Working from home as a result of COVID-19 (n=358)
Q14. Which of the following difficulties, if any, have you experienced as a result of working from home during the COVID-19 pandemic? Base: Working from home as a result of COVID-19 (n=358)
Q15. Do you have a dedicated workspace at home? Base: Working from home as a result of COVID-19 (n=358)

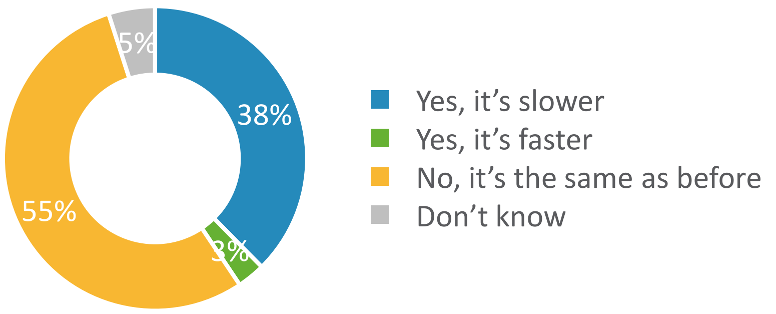
68% are satisfied with the performance of their home internet service since the pandemic began. However, 38% say it is slower than before.

Overall satisfaction with performance of home internet service since COVID-19 pandemic began



BC residents are more likely to say that their internet is slower: 49%

Have noticed a change in performance of home internet since COVID-19 pandemic began?



9%
Have reached the monthly data limit on mobile phone plan since COVID-19 pandemic began

64% No, have not reached the limit
17% Doesn't apply/have unlimited data
10% Don't know

5%
Have reached the monthly data limit on home internet service since COVID-19 pandemic began

48% No, have not reached the limit
35% Doesn't apply/have unlimited data
12% Don't know

Q16. Overall, how satisfied are you with the performance of your home internet service since the COVID-19 pandemic began?
Q17. Have you noticed any change in the performance of your home internet service since the COVID-19 pandemic began?
Q18. Have you reached the monthly data limit on your mobile phone plan since the COVID-19 pandemic began?
Q19. Have you reached the monthly data limit on your home internet service since the COVID-19 pandemic began?
Base: Total sample (n=1,200)

CHANGE IN FREQUENCY OF SHOPPING AT DIFFERENT KINDS OF MERCHANTS

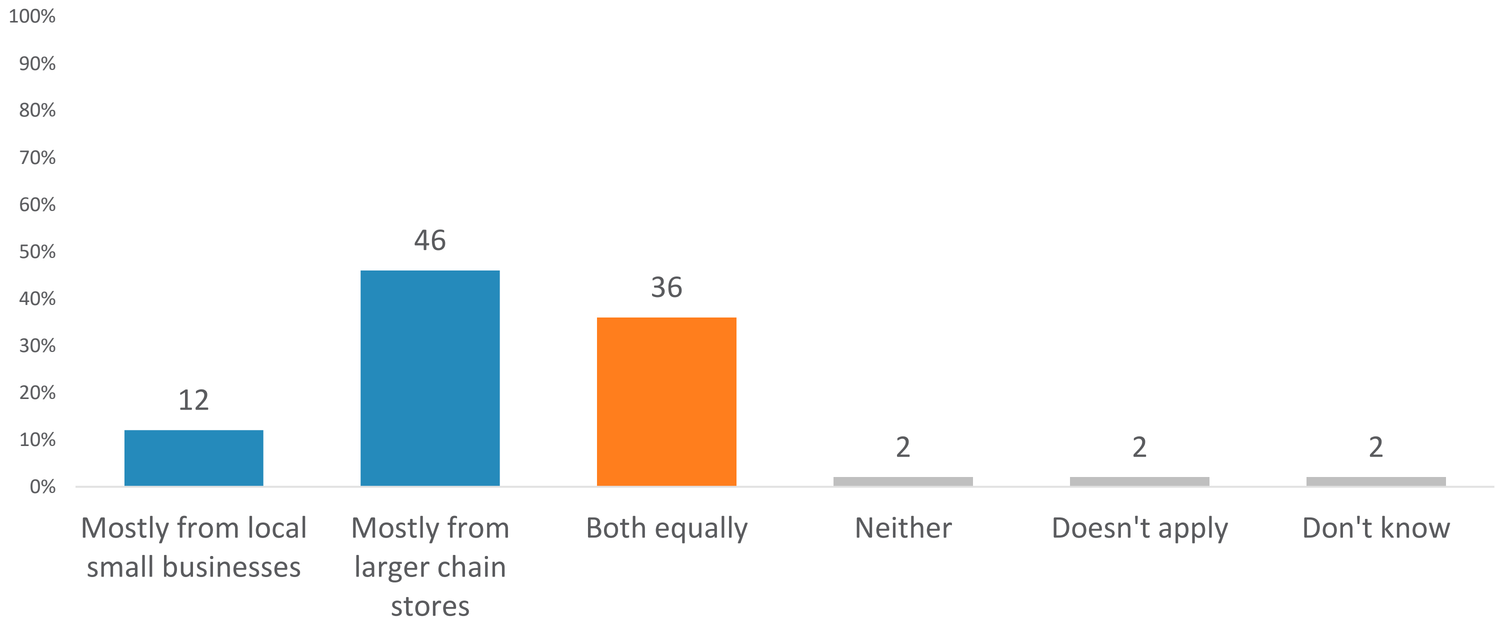
People are more likely to say that their online shopping frequency has increased with large retailers than with local independent stores. Only 15% say they are ordering home food delivery more frequently than before.

	Much more frequently	Somewhat more frequently	About the same amount	Somewhat less frequently	Much less frequently	Doesn't apply	Don't know	% More Frequently	% Less Frequently
Global e-commerce retailers (e.g., Amazon, etc.)	6	14	37	8	13	21	1	20	21
National or large chain grocery stores	7	10	26	12	14	30	1	17	26
Traditional 'bricks and mortar' retailers that also have online stores	3	10	28	11	20	26	2	13	31
Local independent grocery stores	4	7	25	9	16	38	1	11	25
Ordering home food delivery	4	11	24	8	13	39	1	15	21

Q20. Are you shopping online from the following kinds of merchants more or less frequently than you were before the COVID-19 pandemic began?
Q21. Are you ordering home food delivery more or less frequently than you were before the COVID-19 pandemic began?
Base: Total sample (n=1200)

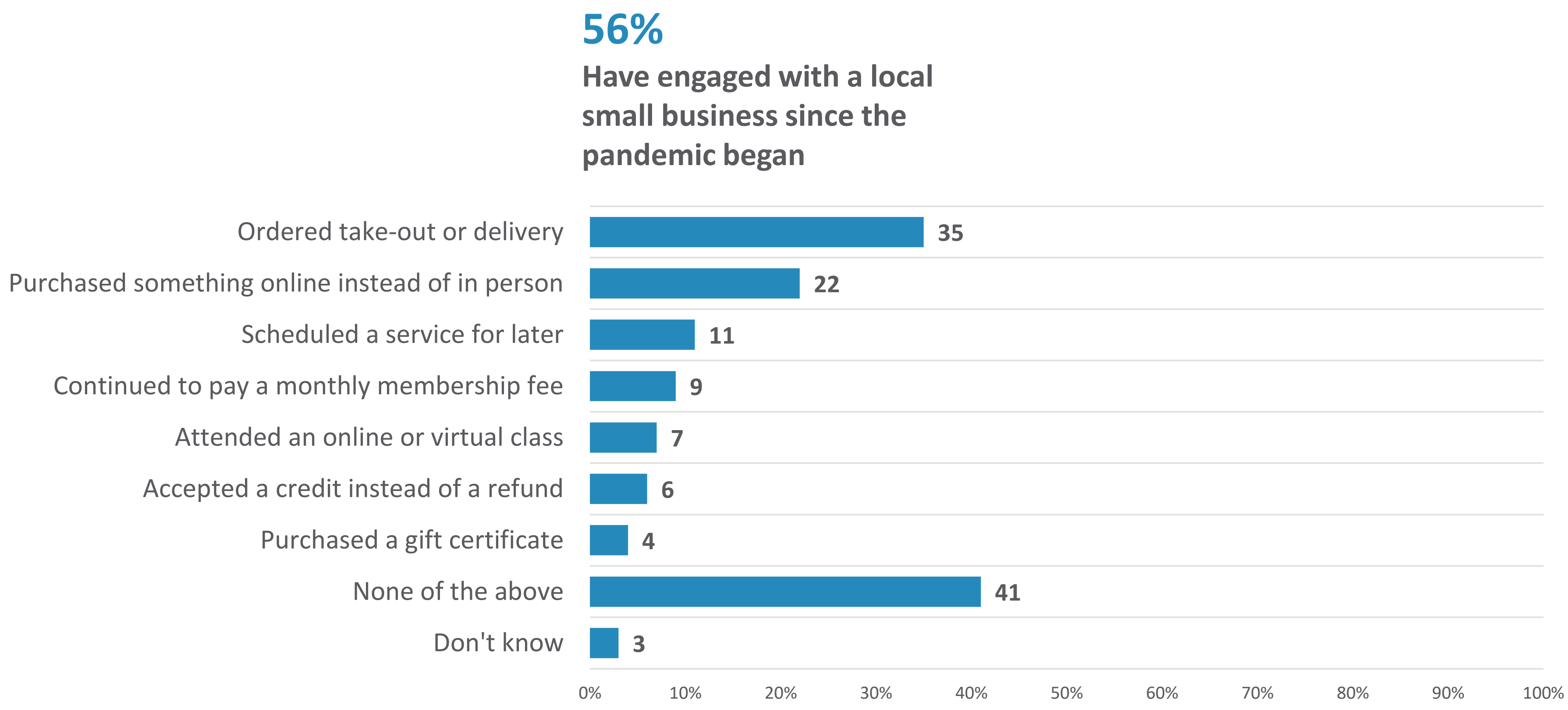
INCIDENCE OF SHOPPING FROM LOCAL SMALL BUSINESSES OR LARGER CHAIN STORES

Over 4-in-10 (46%) say they are shopping mostly from large chain stores for food and other items, while 36% are shopping from both large chain stores and local small businesses. Few (12%) are shopping mostly from local small businesses.



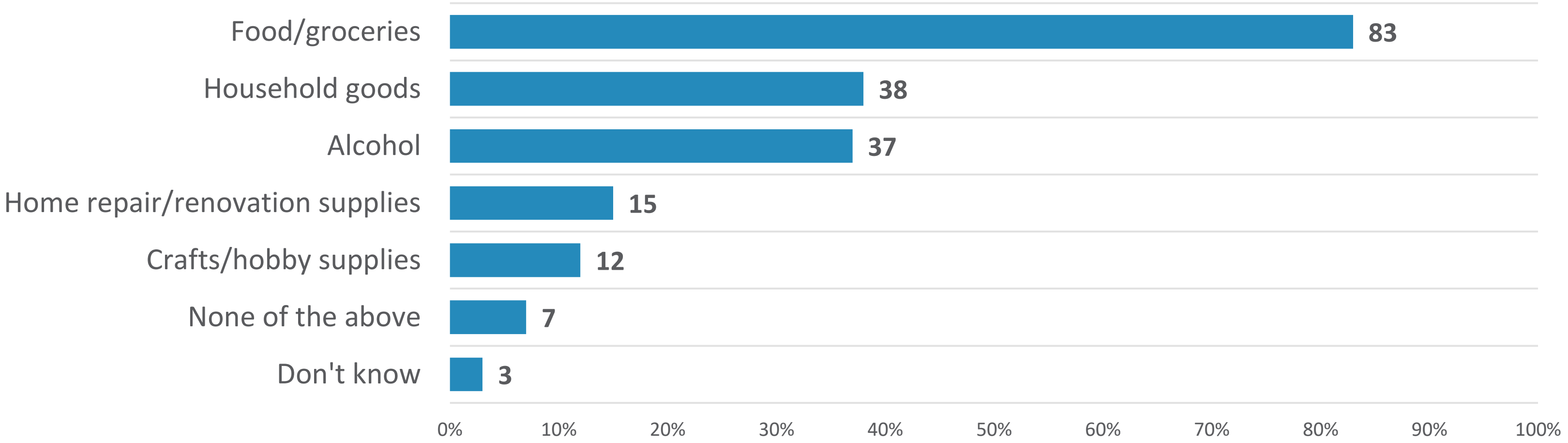
Q22. Would you say that you are shopping for food and/or other items mostly from local area small businesses or mostly from larger chain stores?
Base: Total sample (n=1200)

The most common way of engaging with local area small businesses is by ordering take-out or delivery (35%).



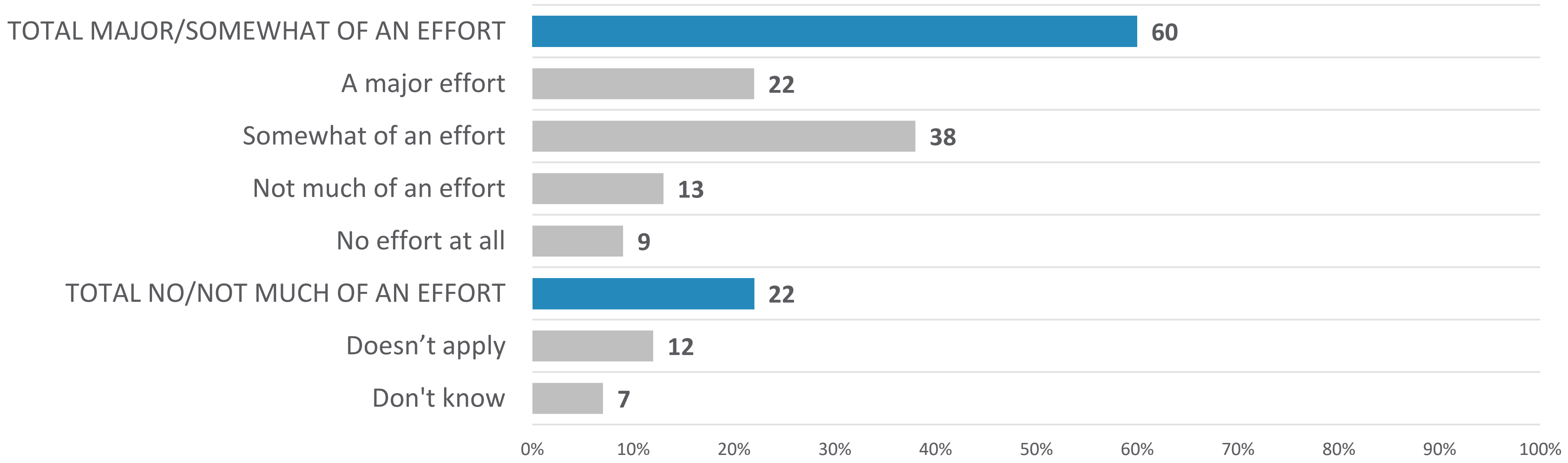
Q23. In which of the following ways, if any, have you engaged with local area small businesses since the COVID-19 pandemic began?
Base: Total sample (n=1200)

9-in-10 have made a purchase from a Canadian business or retailer since the pandemic began, especially food/groceries (83%), household goods (38%) and/or alcohol (37%).



Q24. Which of the following items, if any, have you purchased from **Canadian** businesses and retailers since the COVID-19 pandemic began?
Base: Total sample (n=1200)

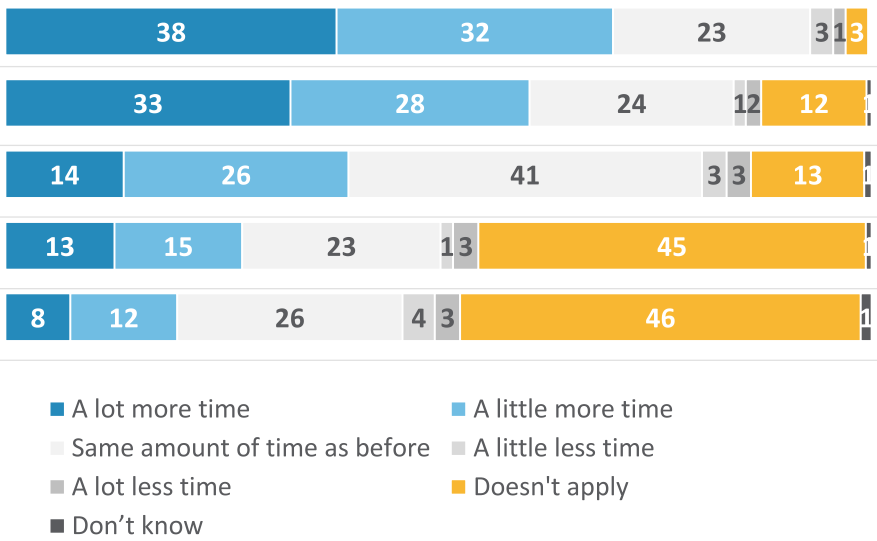
6-in-10 have made an effort to support Canadian businesses and retailers instead of international ones when shopping online since the pandemic began.



Q25. How much of an effort, if any, have you made to support Canadian businesses and retailers instead of international ones when shopping online since the COVID-19 pandemic began?
Base: Total sample (n=1200)

TIME SPENT ENGAGED IN DIFFERENT ACTIVITIES

A third or more are spending ‘a lot’ more time watching TV/movies and connecting with family & friends since the pandemic began.

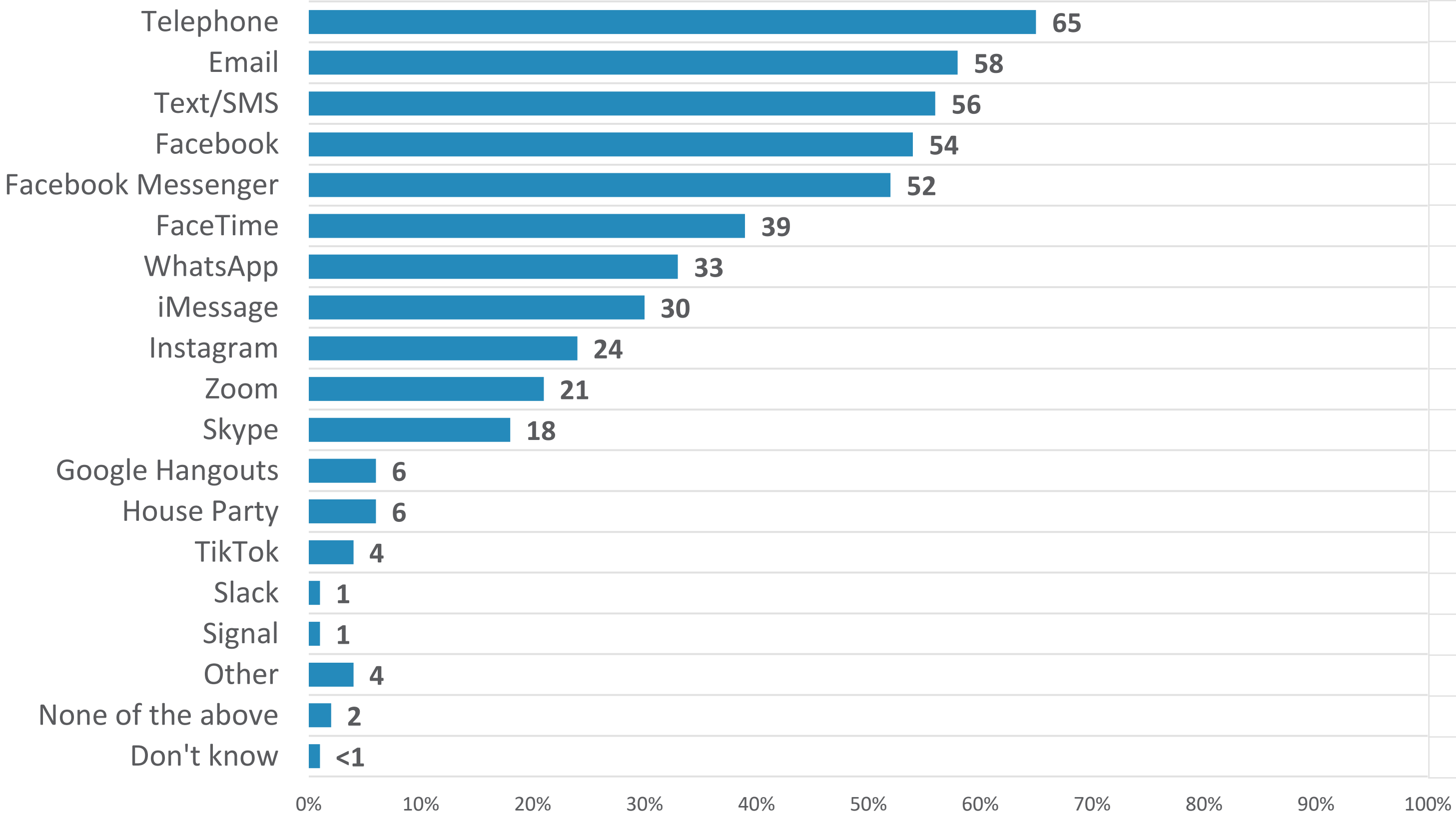


	% More Time	18-39	40-59	60+
Watching TV/movies	70	73	68	69
Connecting with family and friends via video or teleconference	61	67	55	59
Reading books	40	39	36	45
Playing video games online	27	39	21	19
Listening to podcasts	20	25	16	18

18-39 year olds are more likely than those 40+ to be spending more time playing video games and listening to podcasts.

Q26. Are you spending more or less time engaged in the following kinds of activities since the COVID-19 pandemic began?
Base: Total sample (n=1200)

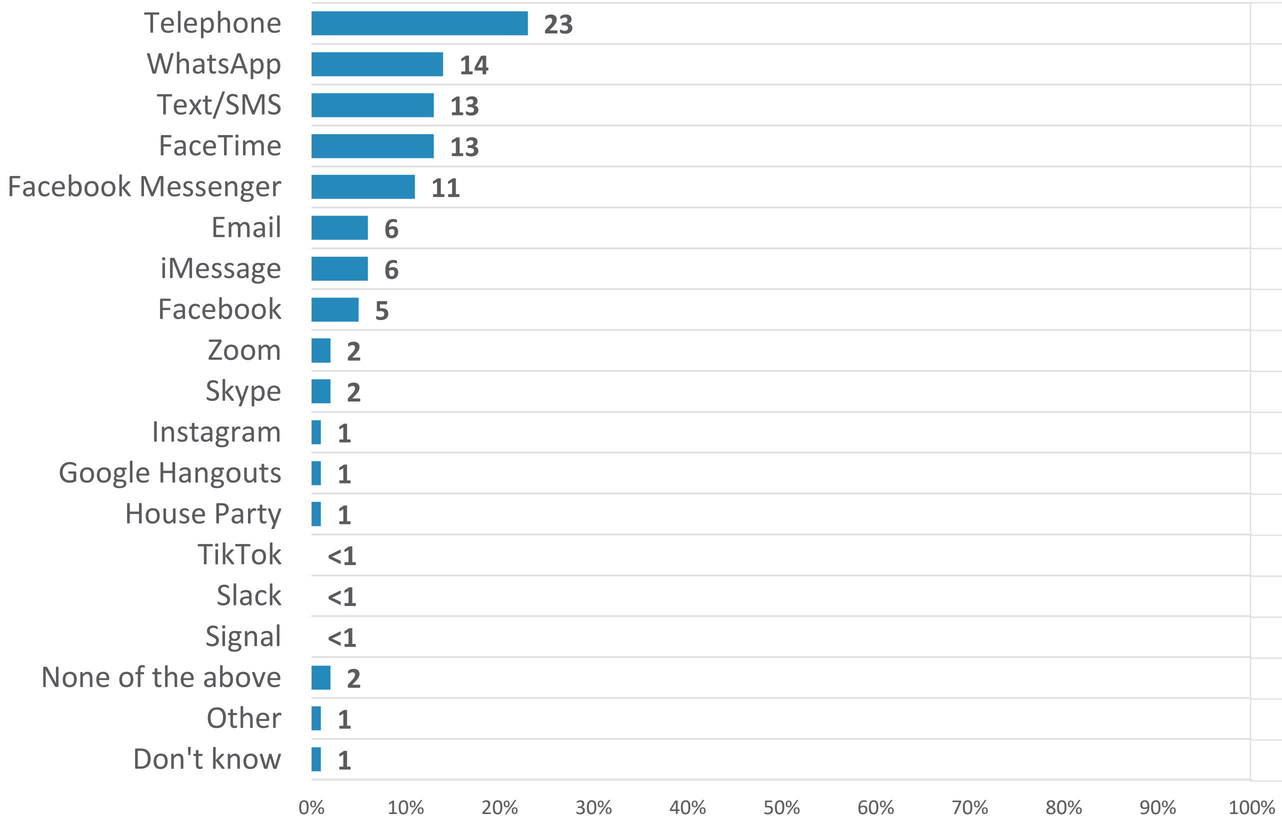
Facebook and Facebook Messenger are the most common ways of connecting online, while telephone is most common overall.



	18-39	40-59	60+
Telephone	51	67	82
Email	42	60	78
Text/SMS	60	59	44
Facebook	53	52	56
Facebook Messenger	57	49	48
FaceTime	43	37	34
WhatsApp	45	33	16
iMessage	38	27	20
Instagram	41	17	10
Zoom	24	21	19
Skype	17	20	16
Google Hangouts	10	4	4
House Party	12	2	2
TikTok	7	2	1
Slack	2	1	<1
Signal	1	<1	<1
Other	4	6	3
None of the above	2	1	2
Don't know	1	<1	<1

Q27. Which of the following tools, apps and/or platforms are you using to stay in touch with family and friends?
Base: Total sample (n=1200)

Telephone tops the list of preferred ways for staying touch, especially among those 40+. Among 18-39 year olds, WhatsApp is most likely to be preferred.



	18-39	40-59	60+
Telephone	8	27	38
WhatsApp	20	14	5
Text/SMS	16	13	9
FaceTime	13	13	13
Facebook Messenger	12	10	9
Email	3	6	13
iMessage	9	6	2
Facebook	4	5	6
Zoom	3	2	1
Skype	2	1	2
Instagram	3	<1	-
Google Hangouts	1	1	1
House Party	1	<1	<1
TikTok	<1	-	-
Slack	<1	-	-
Signal	<1	-	-
None of the above	2	1	2
Other	2	1	<1
Don't know	1	<1	<1

Q28. Which one do you prefer the most for staying in touch with family and friends?
Base: Total sample (n=1200)

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RESPONDENT DEMOGRAPHIC PROFILE

RESPONDENT DEMOGRAPHICS

GENDER

49%	Male
50%	Female
<1%	Non-binary
<1%	Prefer not to answer

AGE

38%	18 to 39
37%	40 to 59
25%	60+

EDUCATION

2%	Some high school
9%	Graduated from high school
12%	Some college/technical/CEGEP
19%	Graduated from college
8%	Some university
30%	Graduated from university
18%	Post-graduate degree
1%	Prefer not to answer

HOUSEHOLD INCOME

20%	<$50K
31%	$50K TO $100K
31%	$100K+
6%	Less than $25,000
13%	$25,000 to just under $50,000
15%	$50,000 to just under $75,000
16%	$75,000 to just under $100,000
18%	$100,000 to just under $150,000
8%	$150,000 to just under $200,000
5%	$200,000 or more
18%	Prefer not to answer

EMPLOYMENT

58%	Working full or part-time
7%	Unemployed because of COVID-19 and looking for work
2%	Unemployed before COVID-19 and looking for work
3%	Unemployed and not looking for work
5%	Student
2%	Stay-at-home parent
22%	Retired
2%	Prefer not to answer

PROVINCE

1%	Newfoundland
<1%	Prince Edward Island
3%	Nova Scotia
2%	New Brunswick
23%	Quebec
39%	Ontario
4%	Manitoba
3%	Saskatchewan
11%	Alberta
14%	British Columbia

RESONDENT DEMOGRAPHICS

NUMBER OF PEOPLE IN HOUSEHOLD

20%	1
41%	2
19%	3
14%	4
4%	5
2%	6
1%	7
<1%	8+

NUMBER OF PEOPLE IN HOUSEHOLD UNDER 18

77%	0
12%	1
8%	2
3%	3
1%	4
<1%	5
<1%	6

COMMUNITY SIZE

27%	> 1 M
34%	100K TO 1 M
10%	10K TO 50K
26%	<10K
27%	City of more than 1,000,000 people
15%	City of 500,000 to 1,000,000
19%	City of 100,000 to just under 500,000
10%	City of 50,000 to just under 100,000
13%	City or town of 10,000 to just under 50,000
7%	Town of under 10,000
7%	Rural or remote
3%	Prefer not to answer

SECTOR (n=692)

11%	Health care
10%	Finance and insurance
9%	Professional, scientific and technical services
9%	Retail/Retail trade
8%	Education/Educational services
7%	Other services
6%	Technology
5%	Manufacturing
5%	Utilities
5%	Transportation and warehousing
3%	Construction
3%	Mining, quarrying, and oil and gas extraction
2%	Information and cultural industries
2%	Not-for-profit
2%	Arts, entertainment and recreation
2%	Agriculture, forestry, fishing and hunting
2%	Accommodation and food services
2%	Wholesale trade
1%	Real estate/rental and leasing
1%	Social assistance
1%	Management of companies and enterprises
<1%	Waste management and remediation services
8%	Other
3%	Government
1%	Military
4%	Other
3%	Prefer not to answer