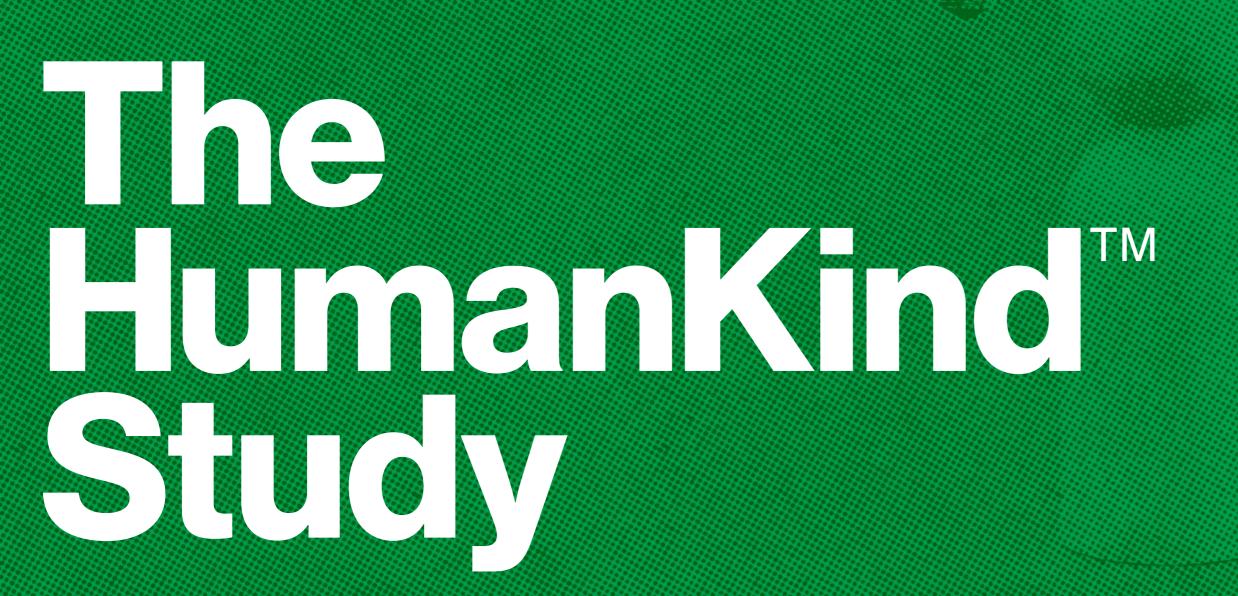
Leo Burnett Canada



A look at the top human problems facing Canadians heading into 2022, and how brands can take action to start solving them.



### Part of the problem, or part of the solution?

Over the past two years, the lives of Canadians have been upended in nearly every aspect — how they work, shop, socialise, learn, care for themselves and for their families has changed dramatically.

Unsurprisingly, with such disruption and changes in human behaviour, the problems Canadians are facing have changed dramatically as well. The pandemic intensified existing issues, tensions and challenges and introduced new ones for Canadians to face.

As Canadians head into a new year, albeit another year of uncertainty, their confidence is shaken. Findings from the Leo Burnett HumanKind<sup>™</sup> Study revealed that 50% of Canadians surveyed are not confident the re-elected government will be able to alleviate their personal, societal, and environmental concerns heading into 2022. What about brands? What role can they play?

While there was no shortage of 'we're all in this together' advertising during the first wave of the pandemic, study findings revealed that only 20% of Canadians expect brands to play a role in solving their problems going forward.

Why? Because Canadians (76%) don't believe brands have a clear understanding of their concerns, issues, or problems.

With Canadians on such unsure footing, this is a tremendous opportunity for brands to step up to fill the void and help Canadians move forward in more positive, helpful, human ways. And it starts by understanding what Canadians are struggling with and doing something about it.

The Leo Burnett HumanKind<sup>™</sup> Study highlights the eight main problem themes impacting the lives of Canadians and provides strategic starting points for how brands might help solve them.

The time is now for brands to step up and be part of the solution.



## Methodology

When the study was first launched in early 2021, it wasn't intended to be a 'Covid Report' heading into 2022. However, it is impossible to separate people's lives from that of the pandemic they are currently living in.

To that end, the responses from Canadians through all phases of the research over 10 months in 2021 reflect this reality, as their problems and challenges are heavily influenced by the pandemic they are still living through.

The survey by Maru Public Opinion was conducted by the online panel experts at Maru/ Blue. Comparable probability sample has an estimated margin of error of +/- 2.5%, for phases 1 and 3. Margin of error is not applicable for phase 2. Phase 1 Quantitative Problem Exploration

Phase 2 Qualitative Deep Dive

Phase 3 Brand Expectations Baseline

#### Sample Size

N=4,633, Adults 18+; all provinces.

Results weighted to census demos on age, gender, region and education.

**Date Range** February – October 2021



## In This Report

- **2.** 2022 Human Problem Themes
  - 2.1 Me-Mentality
  - **Divided We Stand** 2.2
  - 2.3 No Money, Mo Problems
  - 2.4 Mental (un)wellness
  - 2.5 Environment on the Brink
  - **2.6** The Fulfillment Crisis
  - 2.7 Parenting in the Unknown
  - Techno Takeover 2.8

**1.** Consumer Expectations: a Low Bar with High Return

**3.** A Renewed Political Era; Same Party. Same Problems.

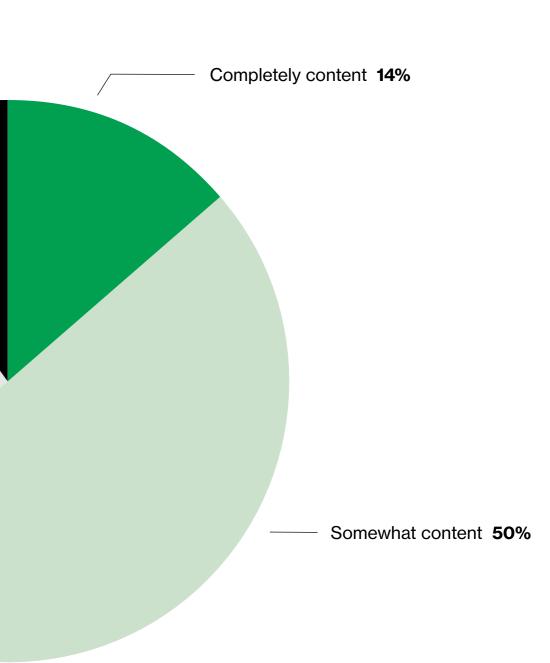
### a Low Bar with High Return

# Consumer Expectations:

# Psychologically, the pandemic has brought life starkly into question.

Surprisingly, 50% of Canadians we surveyed are somewhat enjoying the life they want to live. But as is the human condition, most of us are always looking for more. In fact, 37% of respondents have concluded this is not the life they want to live.

Q: Thinking back to the last 12 months of your life, how content are you with the life you are living today? Not at all content 10%



### Canadians aren't looking to brands, nor do they believe brands have a credible role to play in improving their lives.

"I don't want life to return to the way it was pre-pandemic, but I can't think of a single thing companies can do to help."

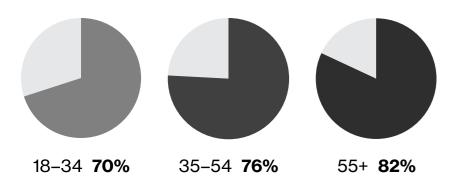
- Talia, Alberta



Of all respondents expect brands to help solve the problems in their lives.

# Low expectations stem from people's belief that brands don't understand their problems.

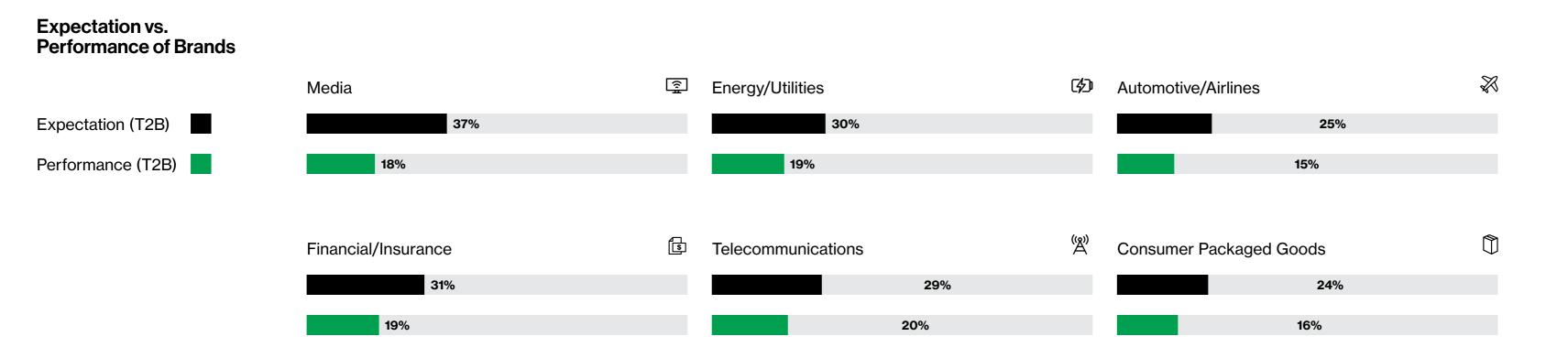
The view that brands do not understand people's issues, concerns and problems increases as people age.





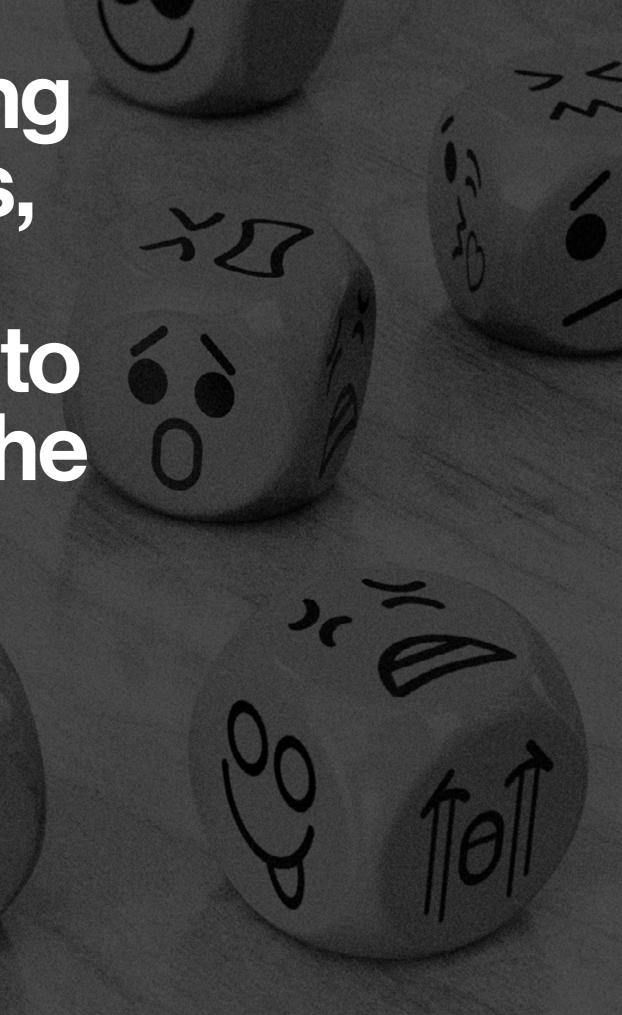
Of all respondents either don't believe, or are unsure that brands have a clear understanding of their concerns, issues or problems.

### While consumer expectations of brands across all major industries is low, their perceived ability to solve their problems is even lower.



Q: Thinking about the following categories, to what extent do the brands in these categories have a responsibility to help solve the concerns, issues or problems that are holding you back from living the life you want to live? Q: Thinking about brands you buy or are aware of in the following categories, how well do you think they are doing at helping to solve the concerns, issues or problems in your life? T2B

# Only by identifying and defining people's needs, barriers, fears, concerns, motivations, hopes and dreams, can brands start to better understand and solve the problems in their lives.



2.

# Human Problems

#### in need of solutions

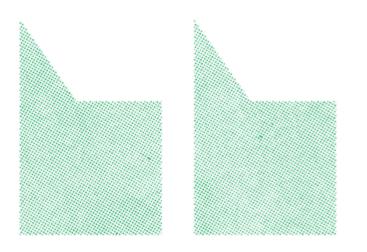
# 21

# Me-Mentality



## As Canadians emerge from lockdown, their focus has shifted from the collective good, to their personal best interests.





We've reverted back to individual needs. At the beginning, we rallied together, but as it has gone on, less and less people are adhering to the rules, and it's gone back to a me-first society.

- Trevor, Newfoundland

### Many are concerned society hasn't learned from the hardships and sacrifices endured over the past 2 years.

"We almost immediately failed to build back better!"

- Ruth, Saskatchewan

"Individual people may have learned lessons, but society as a whole hasn't."

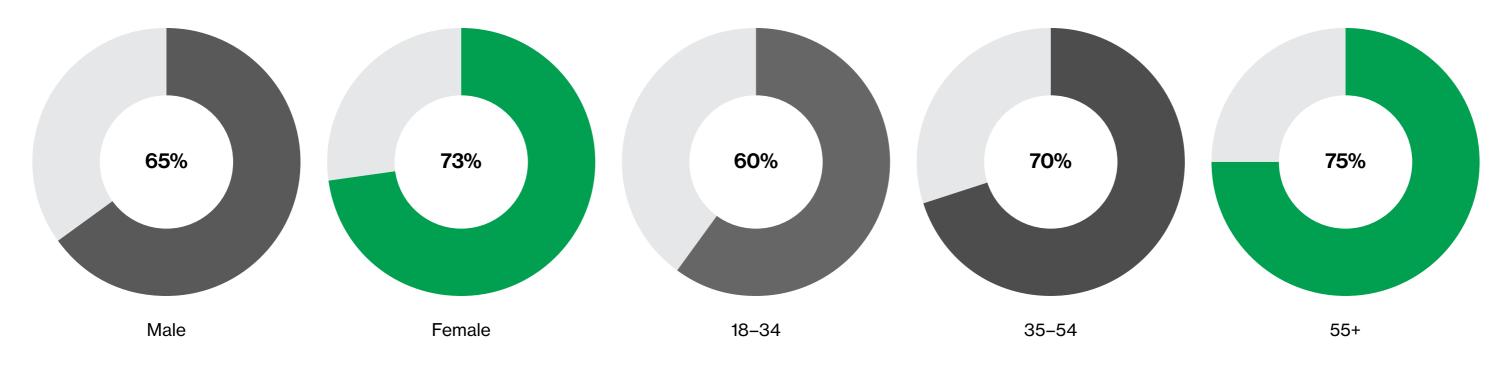
– Lauren, Alberta

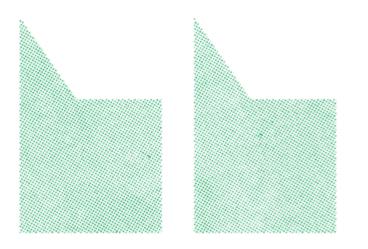


Of all respondents were very concerned or concerned, that, as a society, we haven't learned anything from the pandemic.

### Women and the ageing population are more concerned with society's inability to learn, evolve and improve for the better.

Concerned that, as a society, we haven't learned anything from the pandemic.





As a society, we haven't learned anything from the pandemic. People are still careless and reckless, many are not obeying current social and physical distancing rules, and some are against the vaccines recommended to prevent the spread of the virus.

– Ola, Ontario

## Without a greater sense of collectivism, the challenges feel like looming, inevitable problems.

**Canadians are worried** about a future full of:

- Economic uncertainty
- Extreme weather
- War and conflict
- Another pandemic

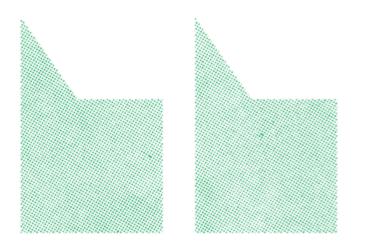


Q. Thinking about your physical and mental health, how concerned are you about each of the following? The future and what hardship might come next. T2B.

the future and what hardships might come next.

But there is hope and opportunity, as some see the pandemic as an opportunity to reset.

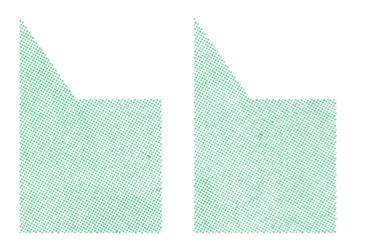




**Despite the circumstance, it's** allowed everyone to really evaluate what they value, and if their actions have been in line with those values, and those of society at large.

– Lauren, Alberta

## Brands have an opportunity to help Canadians come together as they seek to build better lives, better communities, and ultimately a better country for all.



I think that brands could play a **bigger role in changing our lives** for the better, post-pandemic. We should not be focusing on returning to normal, but rather being better than normal in a post-pandemic world.

– Minzie, Alberta

22

### Me-Mentality: Opportunities

# People at the core

How can you activate your brand's purpose, or redefine your value proposition, to focus on helping Canadians rebuild their lives in a way that puts the collective good in sharper focus? Prioritise those with the most concern

How can your brand support those who are carrying the burden of concern (women and ageing populations) for the uncertain future ahead?

#### Back to something better

What role can your brand credibly play in helping people create a better life to return to—even if it's small changes that can make a difference over time?

# 2.2

# **Divided We Stand**

# The pandemic has created two kinds of division: Philosophical and Physical.

Every issue is becoming a wedge issue. Canadians feel that our divisions have become worse, more pronounced and more divisive.

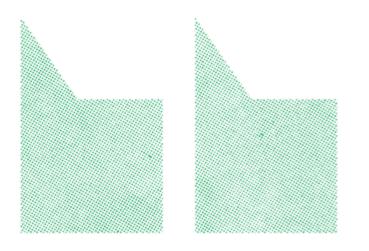
This is compounded by the literal physical divide created by lockdowns. Many are feeling a general sense of anxiety about being around other people that keeps us all at a distance from one another.





# Despite claims of 'togetherness', almost half of Canadians believe philosophically their communities are more divided than ever.

Q. Thinking about your community, how concerned are you about the following? Racism, discrimination or divisiveness in your community. T2B.



**Right now, there is a huge divide** between the two sides [of any issue] and I'm not really sure what can be done to help change people's minds.

– Aaron, Alberta

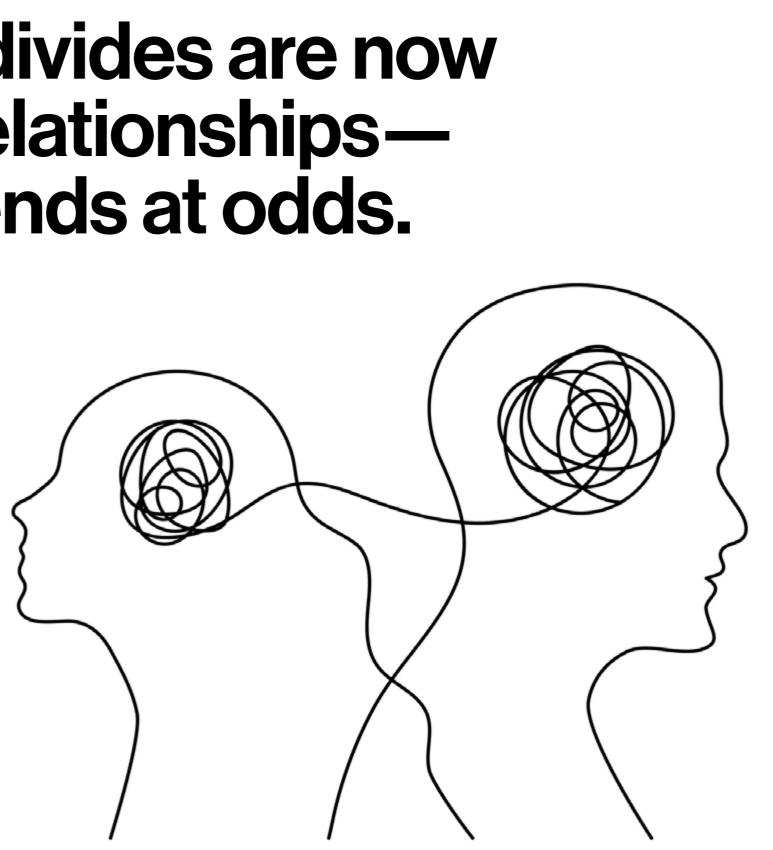
# These philosophical divides are now infiltrating personal relationships—putting family and friends at odds.

"Family get-togethers will be more than a little awkward with people who believe masks are child abuse and that getting vaccinated is somehow both Satan worship and acquiescing to communism."

#### - Aaron, Alberta

"In my volunteering, I will be pressured to be seen to be supporting the most vulnerable persons who often don't believe in COVID, and I am concerned about returning to experience that expectation."

- Ruth, Saskatchewan



# This divide may increase as people's fear of physically being around others will increase the distance between them.

"I think many aspects of our life that once were, won't be the same going forward; even once this pandemic is long over. And one of those is physically being around other people."

- Erica, Newfoundland



Of all respondents are very concerned or concerned about the fear of others (FOO) persisting long after the pandemic.

# Despite the divide, human beings are inherently social and desire human connection.

#### On one side

People are struggling with the notion of being around people they don't know, don't trust, or who don't share their same values or beliefs.

#### On the other side

People are excited to reunite with family and friends and get back the physical intimacy and closeness they've sorely missed over the past 2 years.





### **Divided We Stand:** Opportunities

#### Help those with fear of others

How can your brand help those with fear of others as they reemerge and navigate the new world—what comfort or reassurance can your brand provide them? Lead by example

How can your brand increase social cohesion—a long-standing power of brands—in a divided time?

#### Virtually connect

How can your brand thrive, not just survive, in a less physically connected future?

# 2.3

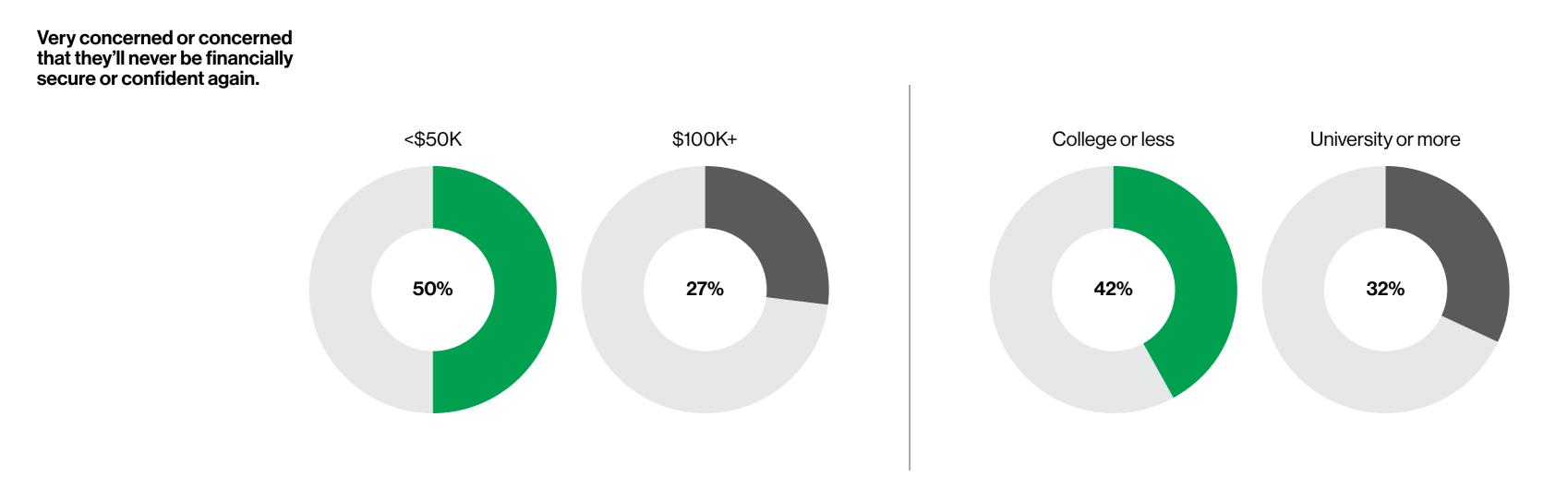
# No Money, No Problems

# 4 out of 10 Canadian respondents are concerned they will never feel financially secure or confident again.

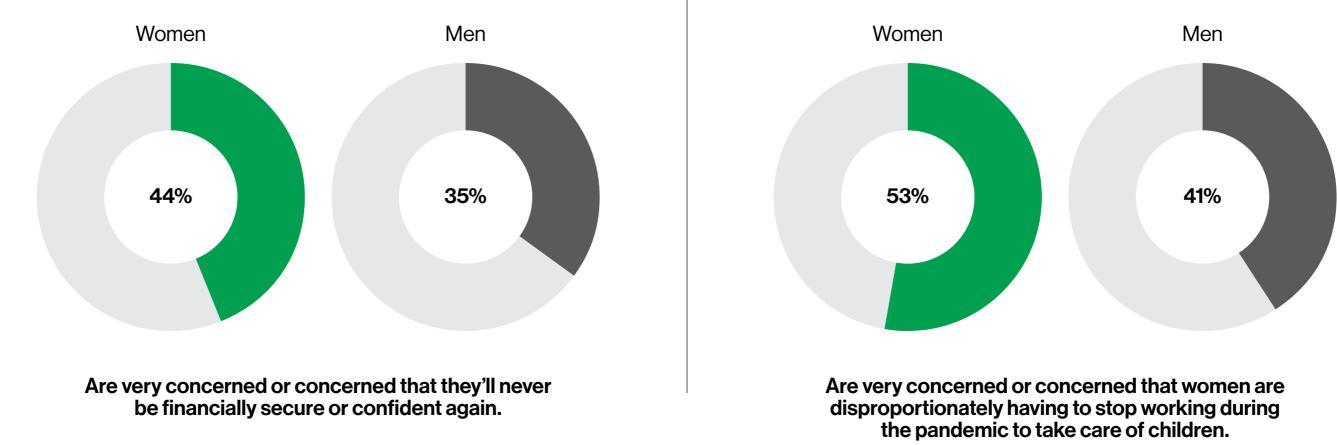




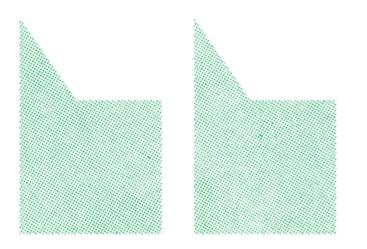
# Those with less education and HHI are feeling the most vulnerable.



### Having borne the brunt of the pandemic, women are particularly concerned about their financial future.



Thinking about your personal finances and those around you, how concerned are you about each of the following? That you'll never be financially secure or confident again AND That women are disproportionately having to stop working during the pandemic to take care of children. T2B.



The pandemic has exposed those who are the most marginalised in society. This group includes hourly workers who work in the hospitality industry... food delivery drivers, low-income wage earners, women, mothers... government and brands should be doing more to help.

– Ismail, Ontario

#### Leo Burnett Canada

#### **Regardless of people's socio-economic** status, most Canadians feel a tangible sense of financial unease.

"The continually rising cost of living has made it difficult for many hard-working people."

#### – Neil, Ontario

"It does seem like prices keep increasing far out of line with the (mild) increases in wages."

#### – Patrick, British Columbia

"If news reports are anything to go by, inflation is going to hit even worse in the coming years than it has recently."

- Michael, Alberta



Of all respondents are very concerned or concerned that everything costs too much and prices are going to keep going up.

### No Money, Mo Problems: Opportunities

## Getting at the heart of it

What are the structural issues underlying economic disparity your brand can credibly impact through marketing or ESG? Equitable pricing

How can you reconfigure existing product and service offerings into a tiered pricing structure to accommodate those with less means?

#### Innovation

How can your brand innovate products, services and customer experiences to ease people's financial stresses and worries?

## 2.4

## Mental (un)wellness

## 1 in 3 Canadians say that their mental health and wellbeing is the worst it has ever been, because of the trauma caused by the pandemic.

Q. Thinking about your mental health and those around you, how concerned are you about each of the following? That your mental health is the worst it has ever been because of the trauma caused by the pandemic. T2B.

### The increased stress is having a negative impact on the quality of their everyday life.

"I have had times when I had to set boundaries, shut doors, be curt in responding, just in order to meet the daily demands. I do function, but there are times when I am just so exhausted."

#### – Neil, Ontario

"Some days, I function at 100% and other days I do not even want to get out of bed."

- Ricky, Ontario



Of all respondents are very concerned or concerned that they're not feeling or functioning the way they'd like to because of stress and anxiety.

# Leaving people feeling increasingly vulnerable regarding their physical and mental health.

"It is not easy trying to see the positive when everything and everyone around me is negative."

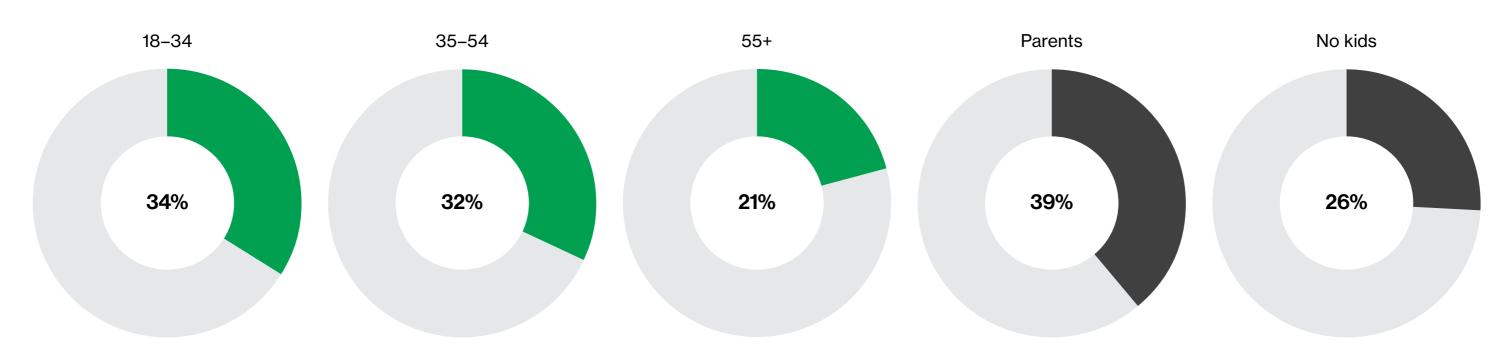
- Ismail, Ontario



Of all respondents are very concerned or concerned about their increased vulnerability to stress and pressure.

# As a coping mechanism, many are turning to vices that are detrimental to their overall health.

Concerned that you're coping with stress and anxiety in ways that are detrimental to your overall health (e.g., drugs, alcohol, over-eating, etc.).



# Young people and parents have struggled the most with their mental health.

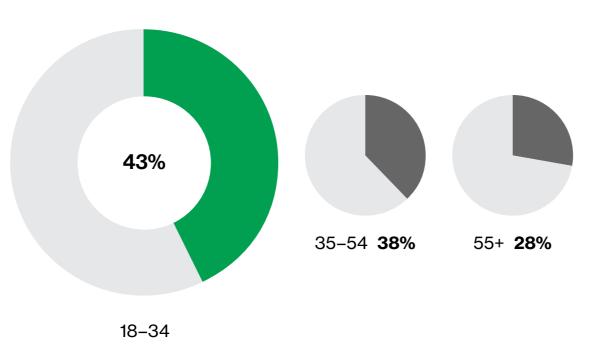
"The challenges my mental health bring up are feelings of tiredness, anxiety, lack of patience and understanding with kids, etc."

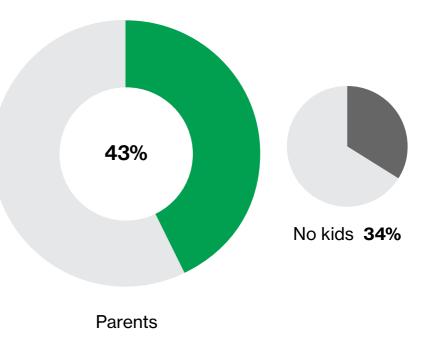
#### – Ali, Alberta

"There have been some rocky times with four in the household. Not saying it's like Survivor, but spending so much time at home with different, strong personalities, means added stress."

- Neil, Ontario

Concerned that your mental health is the worst it has ever been because of the trauma caused by the pandemic.





# Brands should not underestimate the impact of demonstrating their human qualities and traits in action.

"I know some people could just use more support... sometimes, it's almost impossible to get assistance from a real person over the phone because everything has shifted to more automatic and voice prompted telephone lines."

- Ariel, Saskatchewan

"All of them [brands] should do their best to listen to a customer when they reach out for assistance. Just showing that they care (or pretending to care) can help reduce stress in anyone's life."

– Billy, Ontario

### Mental (un)wellness: Opportunities

#### Make mental health a priority

Relook at how you can lean into your brand's purpose and make mental and emotional health for all—consumers and employees—a facet of how you do business. Give people the tools to manage

Think about how your brand can enable people to assess or manage their stresses in more immediate and beneficial ways.

## Moments of stress relief

Some stressors cannot be solved by your brand, but think how your brand can offer a distraction or moment of respite.

## 2.5

## **Environment** on the Brink

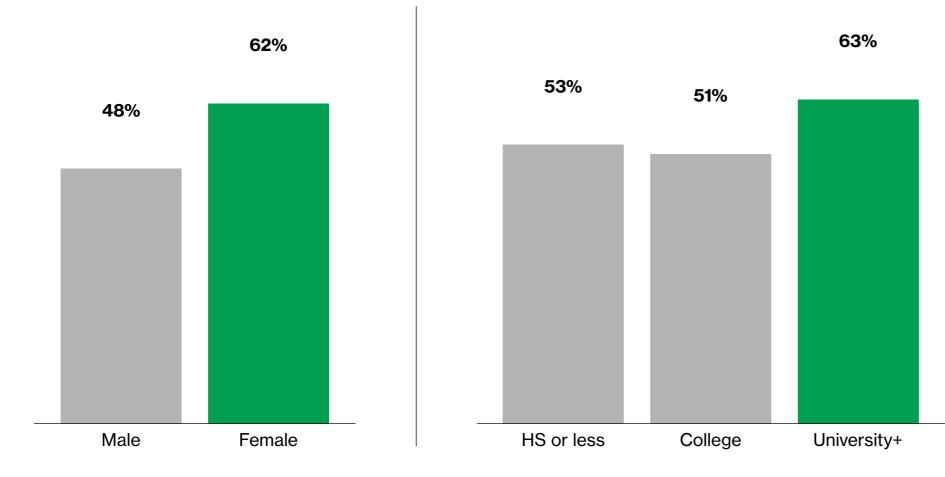


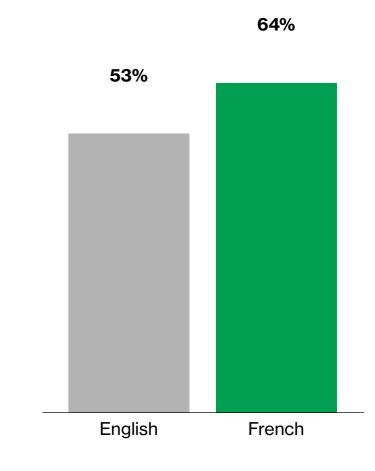
# 55% of Canadians are concerned the earth is past the point of saving.



#### Women and the university educated are particularly concerned that the damage is irreversible.

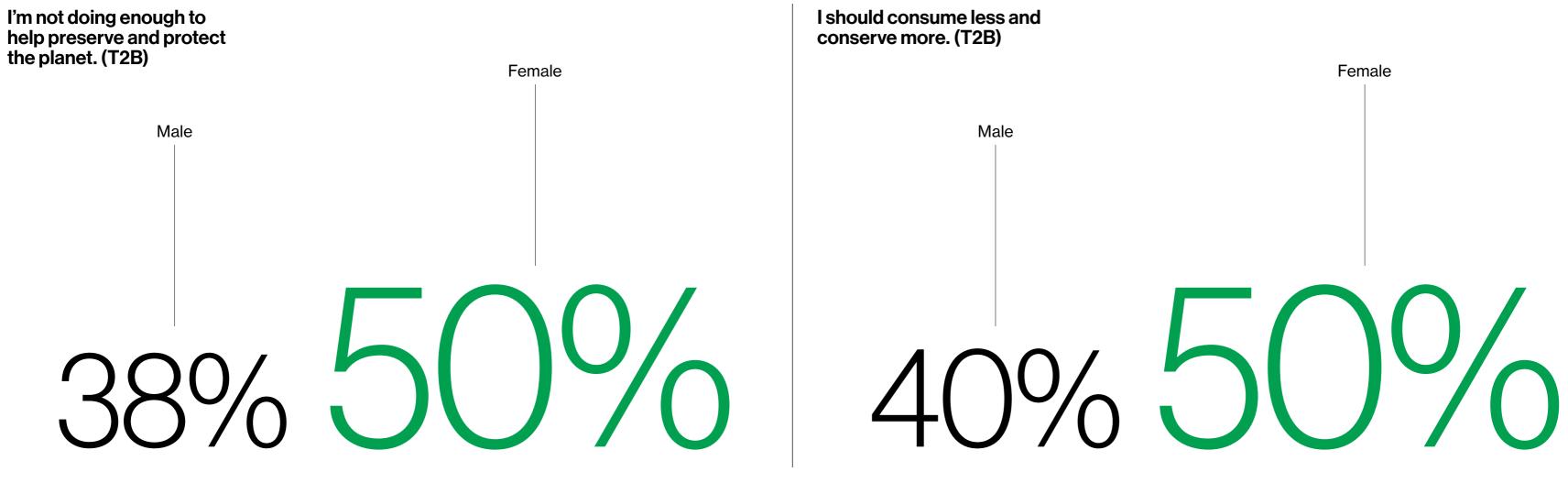
Concerned the earth is past the point of saving.

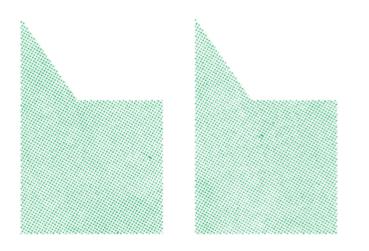




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#### The possibility of environmental crisis has caused some people to question their role.





When I was in school, I remember several people were advocating for the environment. But then it seems we grew up and out of that! Now, most of us have become part of the problem.

– Tetjana, Nova Scotia

# For some, blame shifting is easier than taking personal accountability.

"We are leaving the next generation a planet on the brink of death. We need to change the mindset of the generation that we are currently raising to increase their consciousness and appreciation for the fragility of the balance of life on this planet."

- Ariel, Saskatchewan



Of all respondents are very concerned or concerned that the next generation is taking the planet for granted.

### Despite the 'fait accompli' feeling, other Canadians feel that change of any kind can make a difference.

"The best time to start saving earth would have been 100 years ago, but I think that we have the capacity to help the earth and repair the damage we've done. I actually don't think we are doing enough at this point."

– Laura, Alberta

"The earth may be bad, but anything and everything can help slow the damage. Any organisation that seems to be trying — planting trees, preserving land or trying to find a way to change something — is helping."

- Ryan, British Columbia

## Key to making a difference lies in information.

Things Canadians report doing:

- Avoiding single use plastics
- Using reusable containers
- Driving less / taking transit more
- Eating less red meat
- Organising trash pick-up events
- Making informed choices

"I would like to be more educated on what companies are doing to be environmentally conscious, so that I know I am supporting more businesses that are doing the right thing. I think if companies took on a leadership role in being more environmentally conscious and published what they are doing and how it helps, it would be a great motivator for many citizens."

- Richard, British Columbia

## People just want brands to do something tangible that helps them feel as though they're part of the solution. There is a real feeling that a micro-action will lead to macro-change.

### **Environment on the Brink:** Opportunities

#### Action over words

What can your brand do, rather than say, to help mitigate environmental damage today while mitigating reputational damage tomorrow.

## Opportunity targeting

What are the quick wins or initiatives your brand can lead and/or co-create with consumers to help them feel as though they are making a little or a big difference.

#### Radical transparency

How transparent is your brand willing to be for the sake of trust and informed consumer decision making?

## 2.6

# Crisis



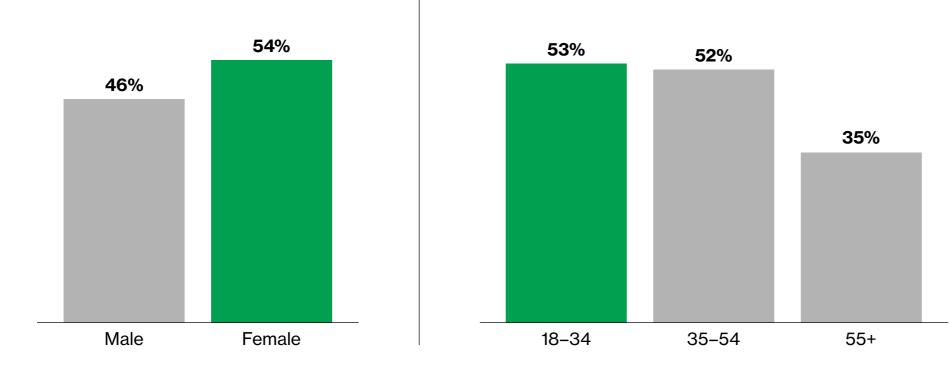


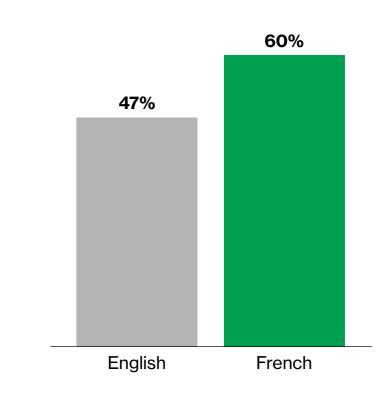
# 50% of Canadian respondents are concerned that too much of their life is being wasted doing something that doesn't make them happy.



### Women, younger gens and French Canadians are most concerned that life is passing them by.

Concerned that life is short and being wasted doing something that doesn't make you happy.





## 4 in 10 Canadians are not fulfilled in their job or career and want to make a change.

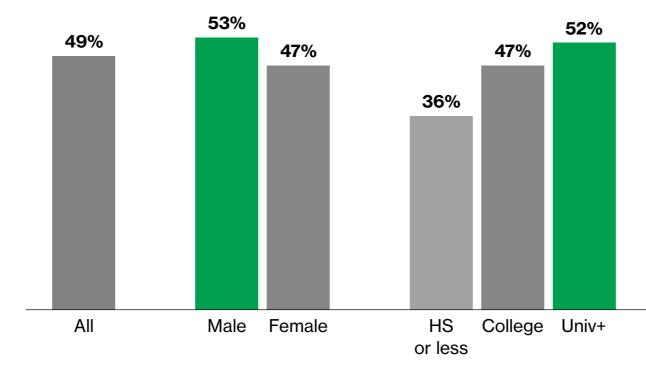


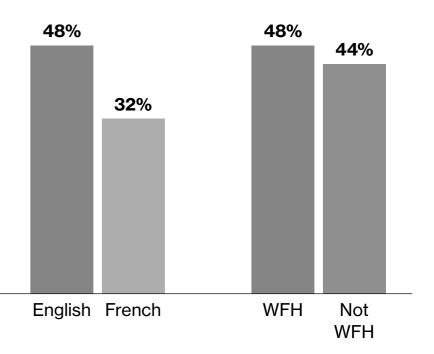
# Men and those with university education are feeling particularly burnt out.

"While it's great to say things like, 'Do what you love and you'll never work another day in your life,' not everyone is fortunate enough to be able to convert their passions into a livable career."

- Brian, Alberta

Feeling burnt out and worried that the workload is just going to get worse.

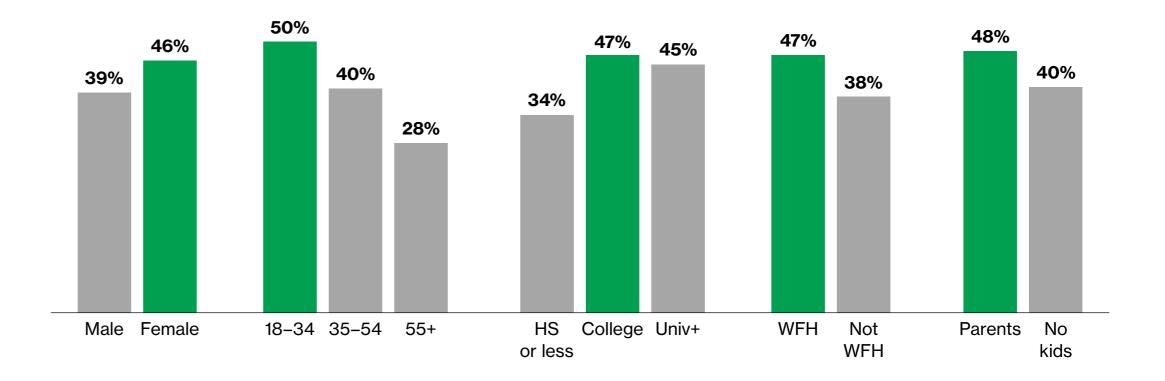




# The unbalance between work and life is a primary cause of unhappiness for many.

#### Maintaining balance as people return to office

Despite the general feeling that work and life are out of balance, as noted in the introduction to this report, many people reported working from home has improved their work/life balance. They want to maintain it and are looking for ways to make that happen as we transition out of the pandemic. Concerned my work and life are out of balance and need adjusting.



#### But Canadian pragmatism runs deep, with some looking to take, rather than cede control of their own happiness.

"My job doesn't make me happy, but I don't feel like I'm wasting my life away, either. I think the key thing is that you are in control of your own life."

- Michelle, British Columbia

"Personally, I think the onus is on the person to ensure they are having a fulfilling life."

- Craig, Alberta

## There's a fulfillment crisis in Canada, and brands can play a meaningful role in helping people find a path to a moment of real contentment.

#### The Fulfillment Crisis: Opportunities

## Purpose with profit

How can you activate your brand's purpose throughout your organisation to put people's needs and desires at the core of what you offer?

# Brand evangelists

How is your brand uniquely suited to providing balance, meaning and fulfillment in your consumer's life?

#### **A life** worth living

How can your brand empower those who are most concerned their life is passing them by to take control, and have a say on their contentment in life?

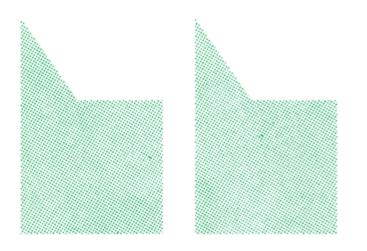
## 2.7

## Parenting in the Unknown



## 61% of parents are worried that their children may have been more emotionally impacted by the pandemic than they're letting on.

Q. Thinking about your role as a parent, how concerned are you about each of the following? That your child(ren) may have been emotionally impacted beyond what they are openly sharing. T2B.



I think my children have been impacted more than they share. My son golfs competitively and is looking to play in college and much of that dream is being shattered by the restrictions limiting tournament play in Canada.

– Myron, Manitoba

#### In part due to the pandemic, 1 in 2 parents are concerned that they need to be more actively involved in their children's lives.

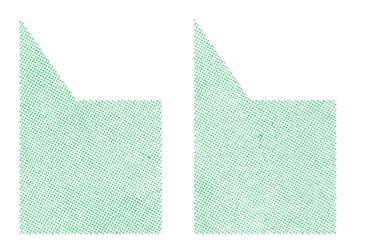
#### This issue affects both people who work outside of the home and those who work from home.

It's a common refrain for people in both situations, either a result of a commute or working longer hours at home: there's just not enough time in the day. This often includes spending time with our children.

But for some Canadians who have been working from home during the pandemic, they've had an opportunity to be more actively involved in their children's lives by virtue of proximity. Now, they're wondering how to best maintain that closeness as the normalcy of life, schedules and routines returns.



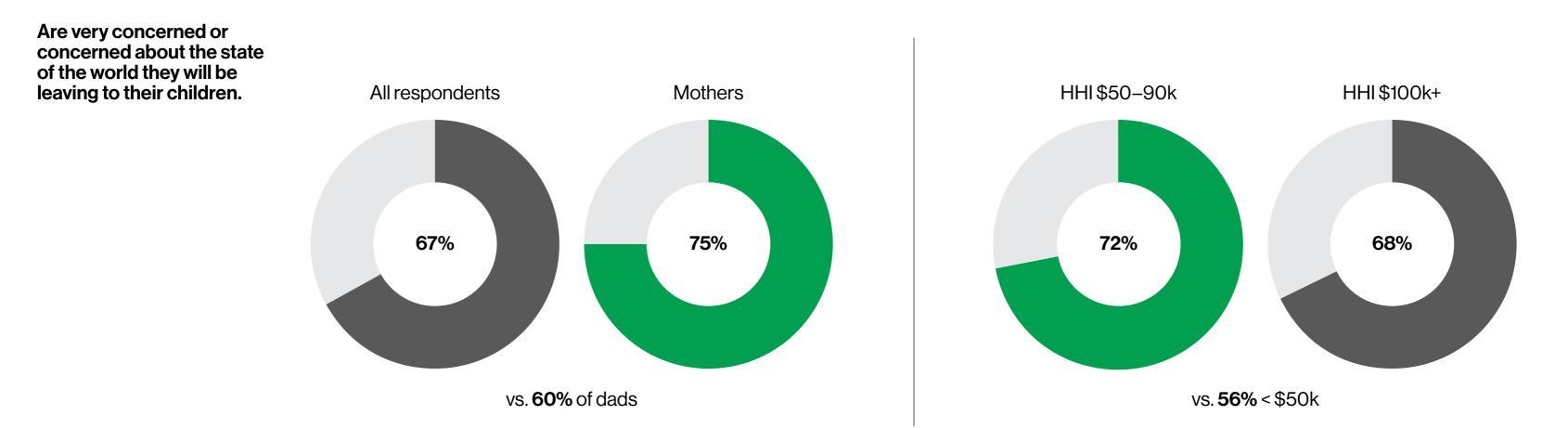




Oddly enough, the pandemic gave me more time to spend with my children. I normally feel like I can't fully participate in all of their activities due to work, but I had more time with them with less going on.

– Andrea, Ontario

#### Parents, especially moms, are concerned about the state of the world they are leaving their children.



#### The state of the world is but one of a long and growing list of worries parents have for their kids.

What keeps Canadian parents up at night?

- 2. Providing a well-balanced life for their kids
- 3. Children's mental health
- 4. Financial inequality today and in the future
- 5. Their job and career stability
- 6. Being able to provide for their family

- 9. Balancing their careers and raising children
- **10.** The perilous state of the planet

**1.** Providing the best possible upbringing for their children

7. The possibility of someone in their family contracting COVID-19

8. The long-term impact of homeschool on their children's development

## Brands have an opportunity to become partners to parents by helping them focus their energy and efforts on their most important cause: their children.

### Parenting in the Unknown: Opportunities

#### A brighter future

What can your brand do to help provide some optimism and opportunity for the future lives of children? Social solutions

How can your brand, product or service enable parents to rebuild connections, either with their children, or for their children?

#### **New routines**

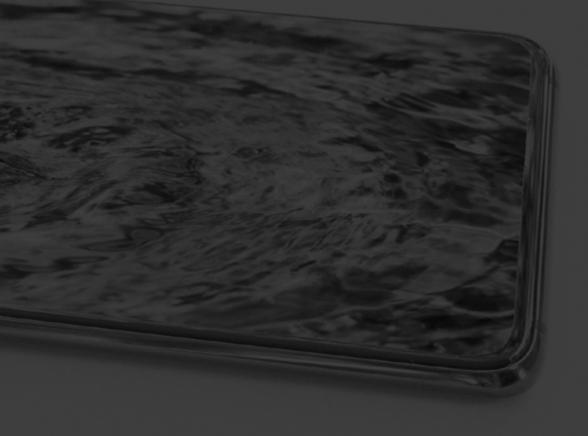
How can your brand support parents, moms especially, who are trying to maintain a closeness with their children while returning to routine?

# 2.8

## Techno Takeover

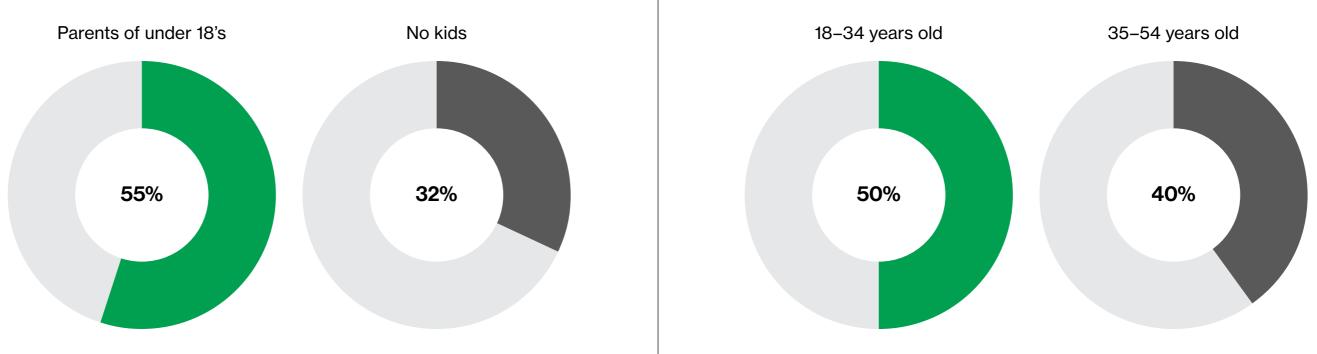


## 4 in 10 Canadians are concerned about screen addiction and its effect on their relationships.



# Parents and young adults are most concerned about the negative effects of increased screen time.

Concerned or very concerned about the negative effect of screen addiction on my relationships.



#### Screens = resentment

In qualitative research, people talked about how screens are dividing their household, with some family members feeling that screens are being prioritised over time with each other.

This is felt more acutely by those working from home, and those who are deliberately trying to minimise screen use when not working. "It is something my husband and I will fight about. I want to have a conversation without him staring at his phone... and my kids get cranky when I tell them it is time to turn off the phones."

– Jessica, Nova Scotia



### 4 in 10 are concerned that technology will eliminate the need for face-to-face connections in the future.



Q. Thinking about your community, how concerned are you about the following? That technology and online communities mean that you no longer need to connect with people in real life. T2B.

#### The content on social media is just as concerning as the excessive screen time

#### Many respondents mentioned the pros of social media (especially during lockdown):

- Able to connect with far away family/friends
- Instant access to news to feel in the loop

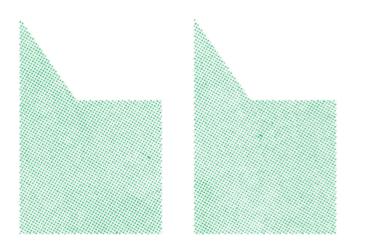
**BUT**—they were quick to point out several concerns too:

- Addictive
- Faceless / no accountability for hurtful posts
- No oversight of disinformation
- Impact of 'always on / always positive' mentality on people's mental health

Of all respondents are concerned or very concerned about social media culture and the unrealistic expectations it creates.



80



Social media is a scourge on society. It is a massive waste of time and has negative effects on young people's minds. We discourage all social media in our house, because it's not real life.

- Craig, Ontario

#### With its impact on mental health, children and relationships, technology and the challenges it poses are pervasive.

"There are so many companies, brands, and products that use technology and social media, that I can't think of one off the top of my head that does it particularly well."

– Melissa, Quebec

"I haven't seen companies that are using technology or social media well at the moment."

- Nicolas, Ontario

People are looking for solutions, and just putting it aside is often not enough. Brands, and how they utilise technology, can help address this human problem.

#### Techno Takeover: Opportunities

#### Leading the way

What role can your brand play in leading the way to contributing more positively to social media? Tech with purpose

How can your brand utilise digital technology to bring people together vs. push them apart?

#### Time to turn off

How can your brand encourage moments of real, in-person connection?

3.

# A Renewed Political Era

#### Same Party. Same Problems.

# Canadians stayed the course despite choices for change.

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During the final phase of research for this study a Federal Election was called. Elections can change a little, or change a lot of things in people's lives, and we wanted to understand what this election meant for the problems people are facing heading into 2022. NOTE

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Have the election results made any problems worse? Better? Are there new problems? Before publishing this report, we went back in field to help answer these questions.

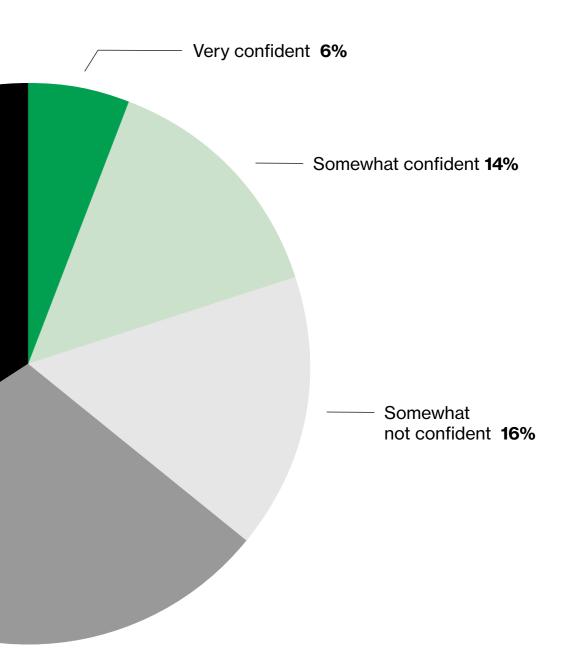
#### **Canadians have lost confidence** in the government they elected.

Prior to the election, 52% of Canadians expected the government to help solve their problems. Post-election, only 20% of Canadians are confident that the new (re-elected) government can help solve the problems in their life. This reported shift in confidence represents a big opportunity for brands to step in and earn people's trust.

Level of confidence in the new government to help solve problems facing Canadians.

Not at all confident **34%** 

Neither confident nor not confident **30%** 



# For many, the expectation is low that this government will address the problems they are facing in their lives.

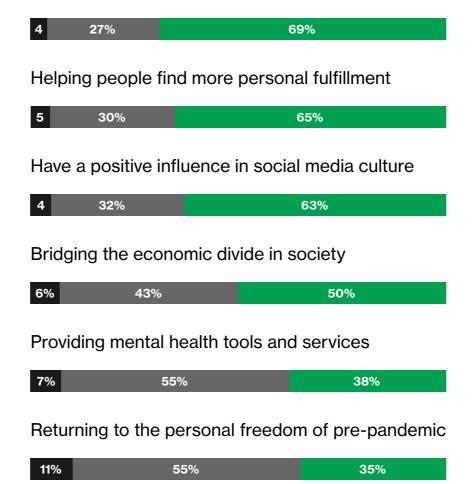
Q: To what extent do you think the new government will address the following concerns, issues or problems?

Completely address

Somewhat address

Not address at all

Reducing screen addiction and its impact



Helping parents connect with their children better

5	29%	67%		
Helping people manage their finances better				
6%	30%	64%		
Help people balance the demands of work and life				
5	37%	58%		
Reducing the divisiveness between people				
7%	44%	49%		
Reducing negative environmental impacts				
9%	47%	44%		
Reducing racism and discrimination in society				

9%	55%	36%

#### Brands have an opportunity to step in and step up where the government is perceived to be falling short.





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## It's time to think forward.

"What helps people, helps business."

- Leo Burnett

The findings in this study are a tremendous opportunity for brands. With greater understanding of what's on the minds of Canadians and the barriers in their lives, brands can focus on helping to alleviate people's problems and in doing so, increase brand trust, intimacy and ultimately — growth.

To learn how Leo Burnett can help you understand the people behind your brand's future growth, please visit **leoburnett.ca** or reach out directly to **ben.tarr@leoburnett.ca** to learn more about the new Leo Burnett "Think Forward" creative product.

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