



The South Asian Path to Purchase

Pearl Strategy and Innovation Design
March 25, 2014

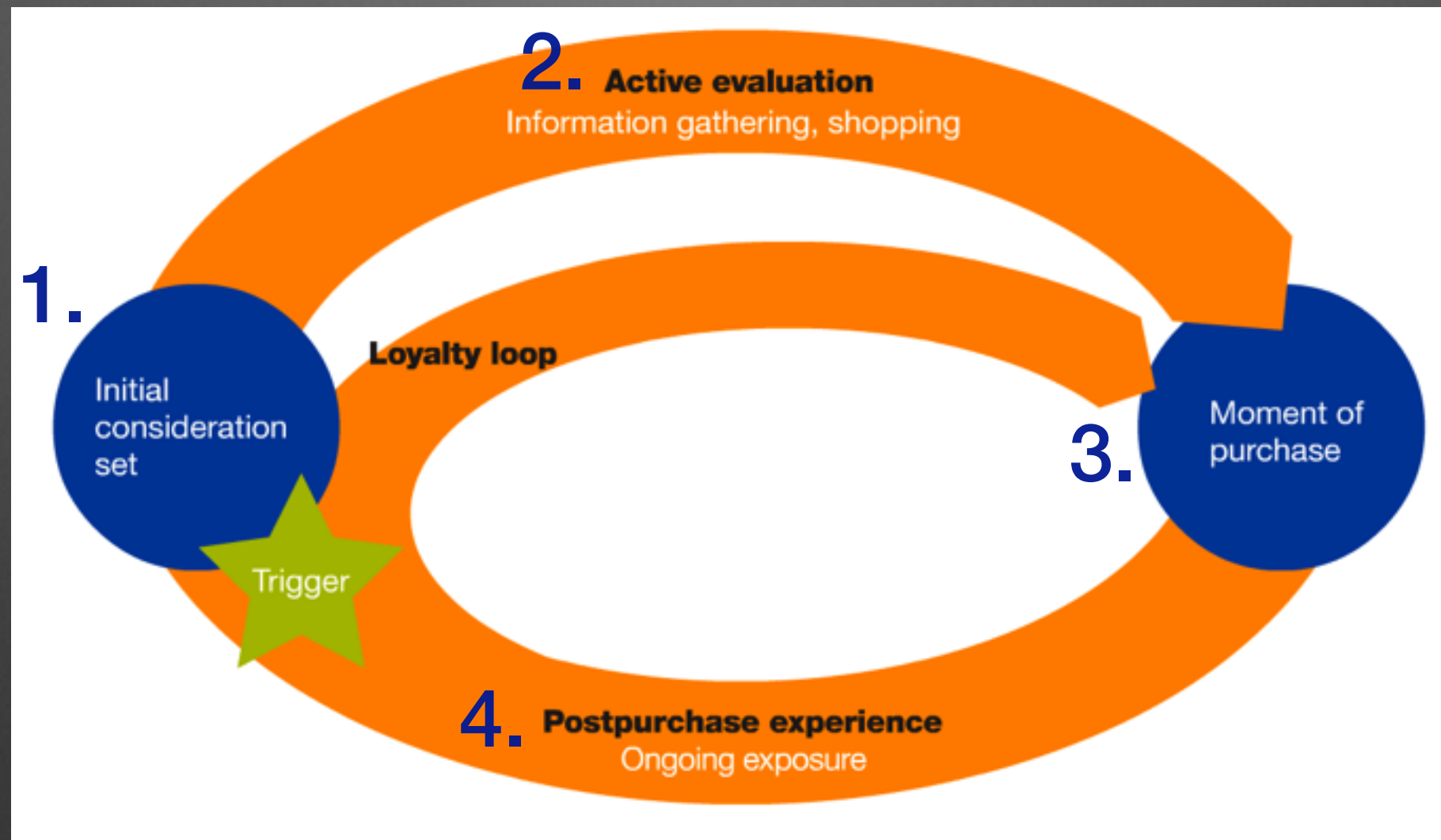
Study Approach

- Focus groups
- In-home ethnography
- Shop-along interviews
- Ecosystem panel



- Qualitative research findings are directional in nature

Study Approach



McKinsey Consumer Decision Journey

Agenda

- Coming to Canada
- Path to purchase - Food
- Path to purchase - Personal Care
- Implications



Coming to Canada

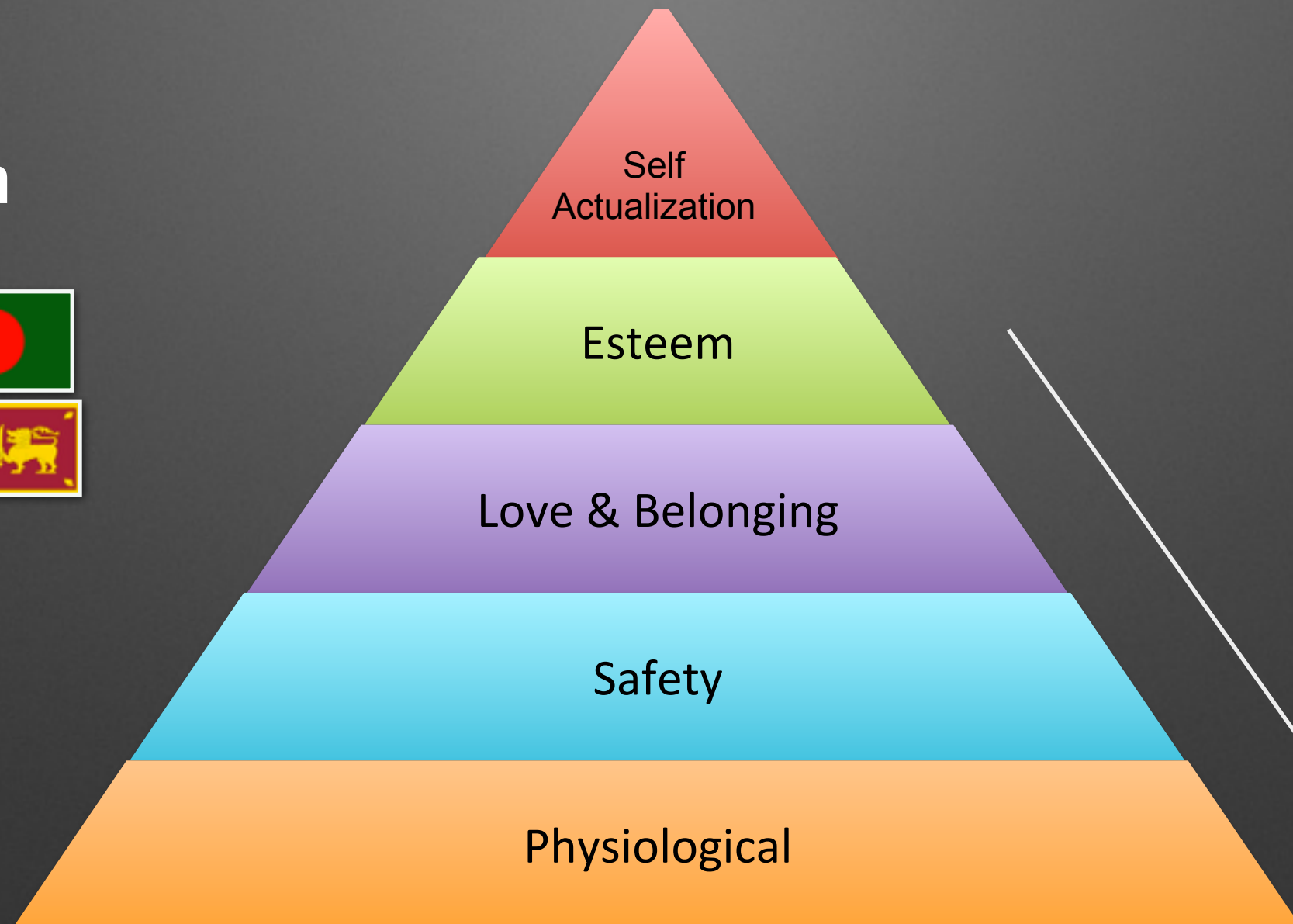
< 2
years

Maslow's Hierarchy of Needs

From



To



< 2
years

Maslow's Hierarchy of Needs



New Canadians worry about meeting their basic needs, while seeking stable employment.

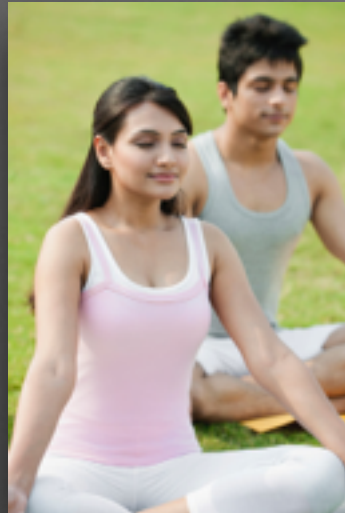


New Canadians are time starved as they perform tasks done by others in their home country.

Physiological

5+
years

Maslow's Hierarchy of Needs



As South Asian
become more stable,
their focus turns to
maintaining their
health.



Most South Asian
newcomers are well
educated and strive to
be their very best.

Esteem



Path to Purchase - Food

< 2
years

Food Acculturation



Barriers

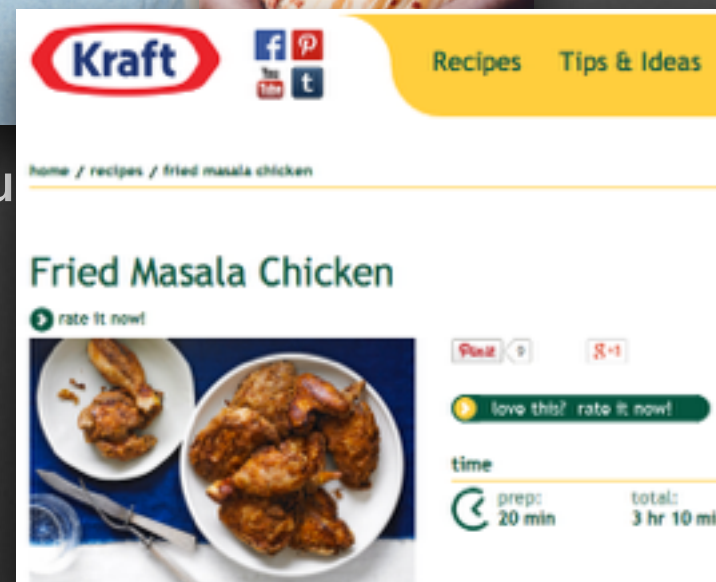


Religion

5+
years



Human



Fusion Cooking

Enablers



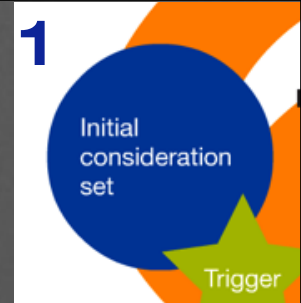
Adventure



Kids

< 2
years

Sources of Awareness



Friends



Kids

5+
years



Home Country

Media - North American skew



Media (South Asian skew)



Health Professionals



Quick Serve Restaurants

< 2
years

FAQs

2. **Active evaluation**
Information gathering, shopping



Halal



New Foods



Recipes

< 2
years

Sources of Information

2. **Active evaluation**
Information gathering, shopping



Friends



Settlement Workers
& English Teachers



Online

< 2
years

Flyers

2. **Active evaluation**
Information gathering, shopping



< 2
years

Channels

2. Active evaluation
Information gathering, shopping

5+
years



Ethnic



Discount



Warehouse Club



< 2
years

Category Attributes



Taste



Fresh



Convenience



< 2
years

Convenience

3.

Moment of
purchase



< 2
years

Product Attributes

3.

Moment of
purchase

5+
years



Trusted Brands

Quality

Health Claims

< 2
years

Product Attributes for Muslims

3.

Moment of
purchase



Halal Meats

Chicken
Goat
Beef
Turkey
Lamb

Blessed &
Slaughtered by
Hand



Blessed &
Slaughtered by
machine



Self-Blessed
Halal Eligible
Meat

< 2
years

Product Attributes for Muslims

3. Moment of purchase



Avoid

Alcohol
Pork
Rennet
Animal Fat



Check

Gelatin
Whey Powder



Categories

Yogurt
Cheese
Butter
Margarine
Chocolate
Marshmallows
Chips



< 2
years

Trial Drivers

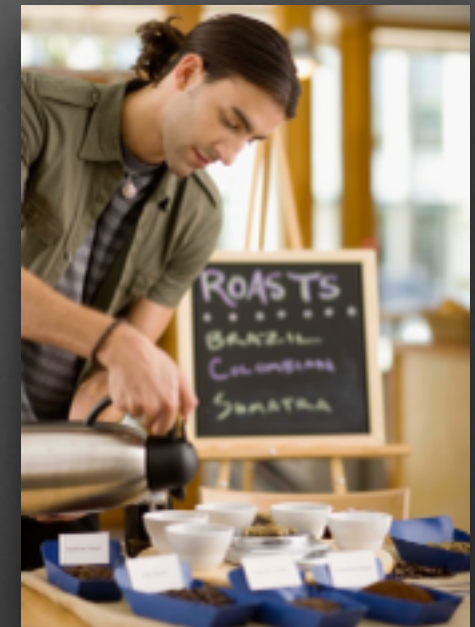


Price

5+
years



Display



Sampling



WAS 2.99

new lower prices

4.19

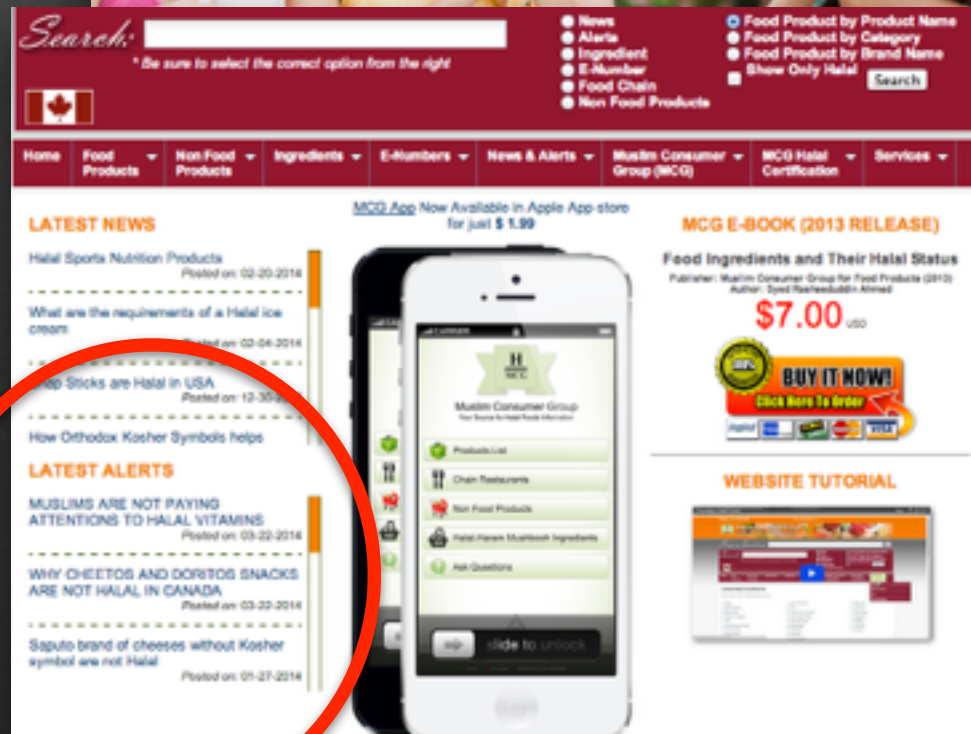
4.19



< 2
years

4. Postpurchase experience

Ongoing exposure



www.canadianhalalfoods.com



1-800#



Path to Purchase - Personal Care

< 2
years

Sources of Awareness



Home Country Brands



Friends

< 2
years

FAQs

2. **Active evaluation**
Information gathering, shopping

5+
years



Shiny Hair



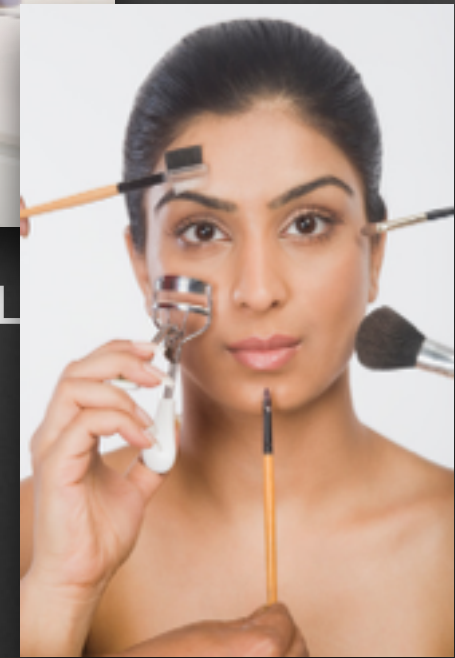
Hair & Dandruff



Face Care



Dry Skin & L



Make-up



< 2
years

Sources of Information

2. **Active evaluation**
Information gathering, shopping



5+
years

Select Friends



Health Professional



Search



In-Store



Cosmetician

< 2
years

Channels

2. **Active evaluation**
Information gathering, shopping



Discount



Mass Merchandiser



Drug Store

5+
years

Channels

2. **Active evaluation**
Information gathering, shopping



Store Location



Store Layout



Product Assortment



Optimum Points



Personalized Service



< 2
years

Product Attributes

3.

Moment of
purchase



Familiar Brands



Versatile



Quality
Natural



Cosmetician
Halal
Recommendation



Implications



< 2 years

Implications



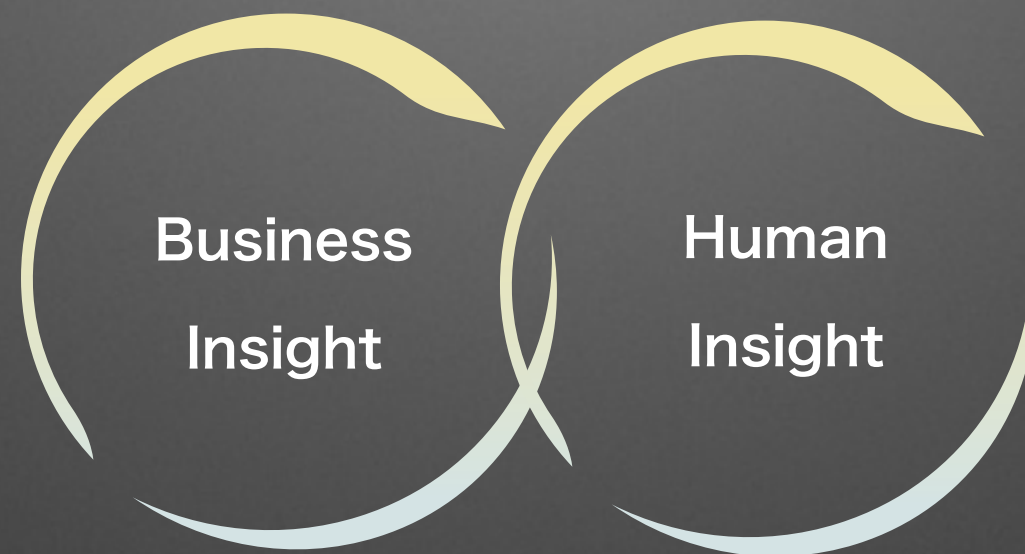
5+ years

1. Focus on meeting their functional needs.
2. Build brand awareness at the grassroots level.
3. Reduce barriers to trial.

1. Evolve to meeting their emotional needs.
2. Optimize their experience with your brand.
3. Reframe the moment of purchase from price to value.

PEARL

STRATEGY AND INNOVATION DESIGN



John Chan
416 575 2246
johnchan@pearl-strategy.ca