



The Changing Face of Canada *To Target or Not to Target*

Presented: June 19, 2013

The Dilemma ...



To Target or Not to Target



How big is the
opportunity?



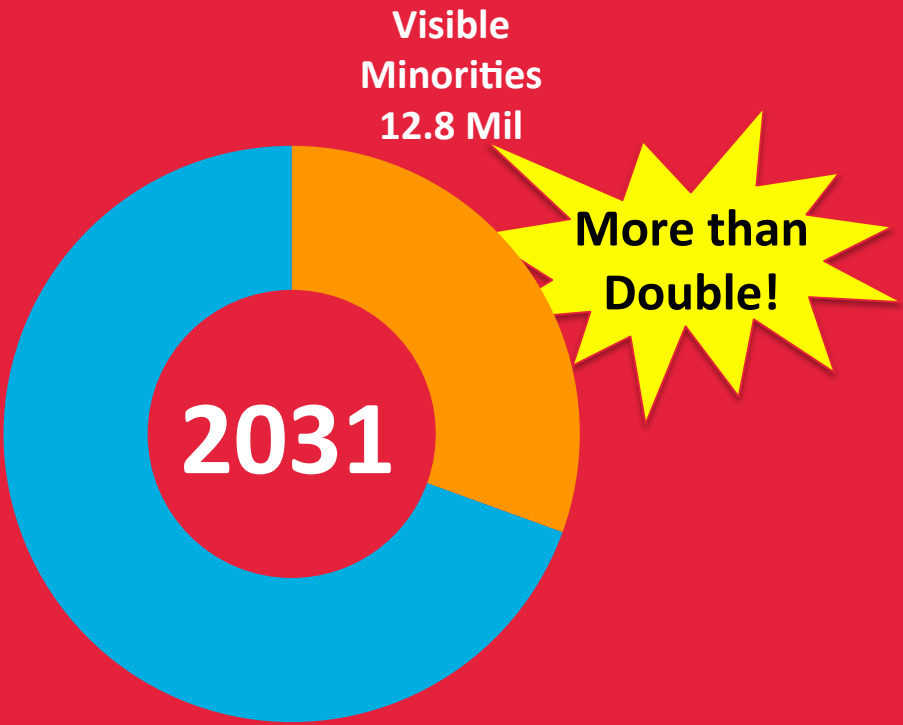
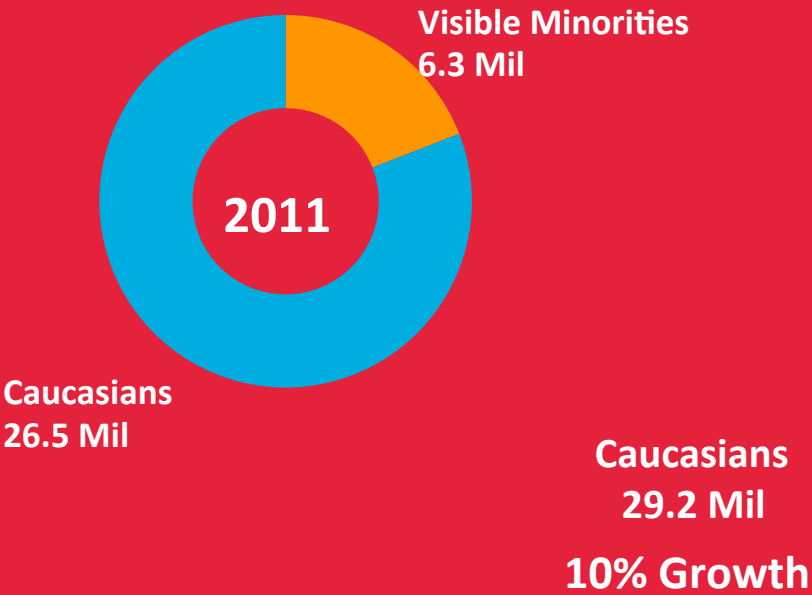
Who is she?



What are her
needs?

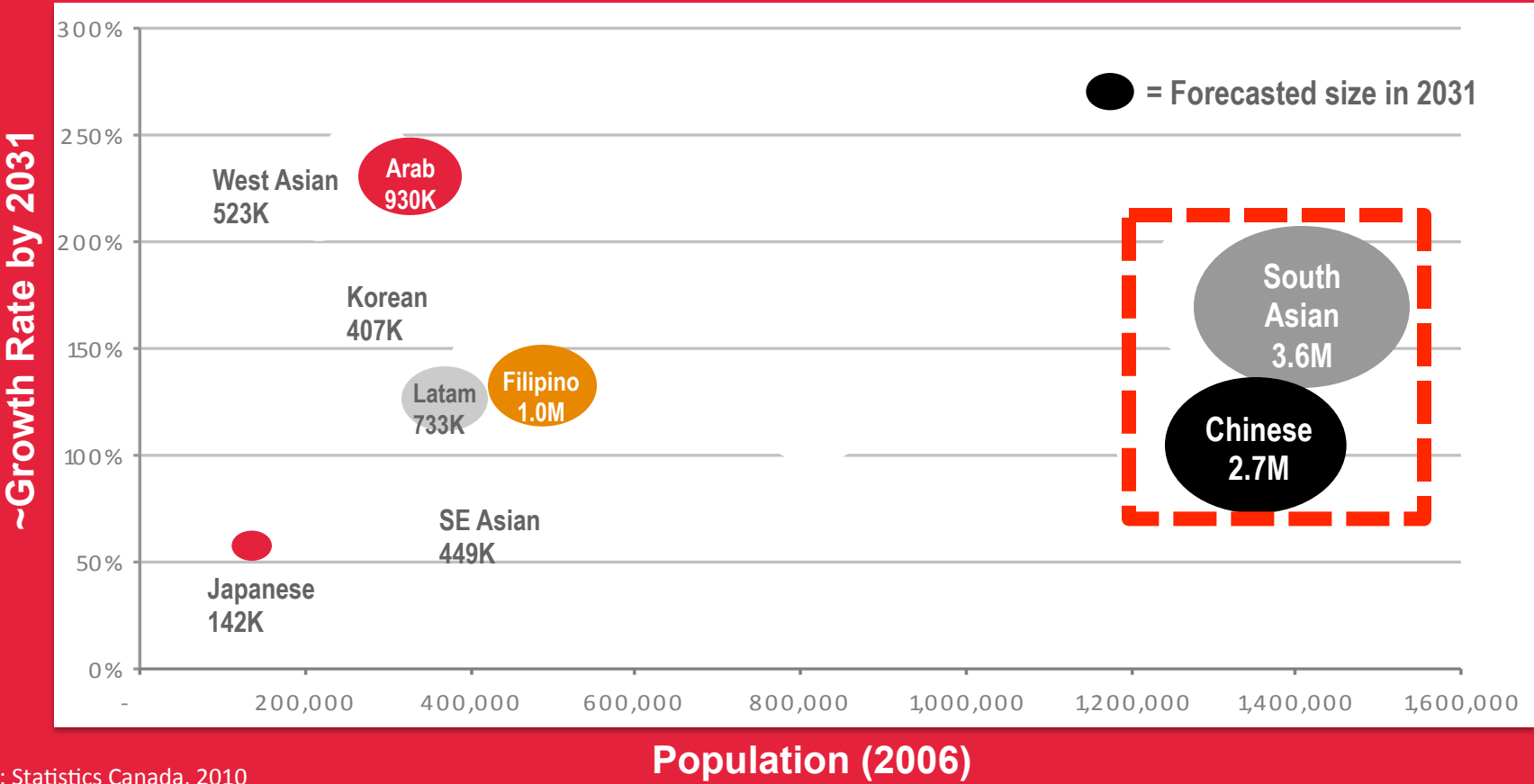
- ✓ Qualitative research
- ✓ Ethnographies & Ecosystem panels
- ✓ Findings are directional

Canadian Population Growth



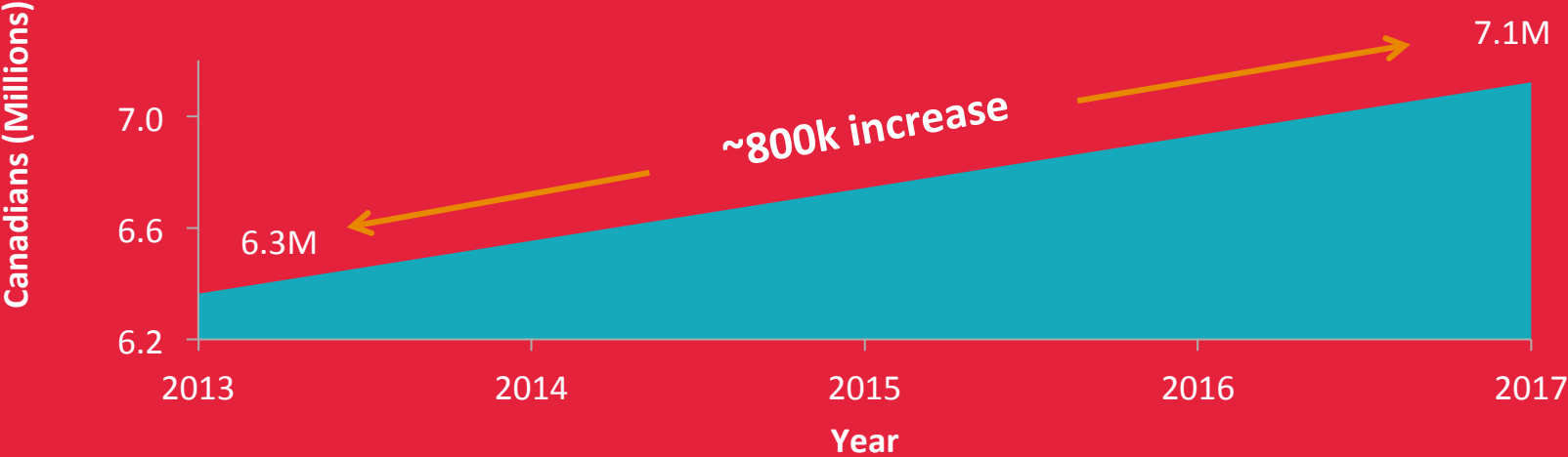
Source: Statistics Canada 2010 Medium Growth Scenario, 2011 Immigration & Ethno-cultural Diversity in Canada

Population Growth By Ethnicity

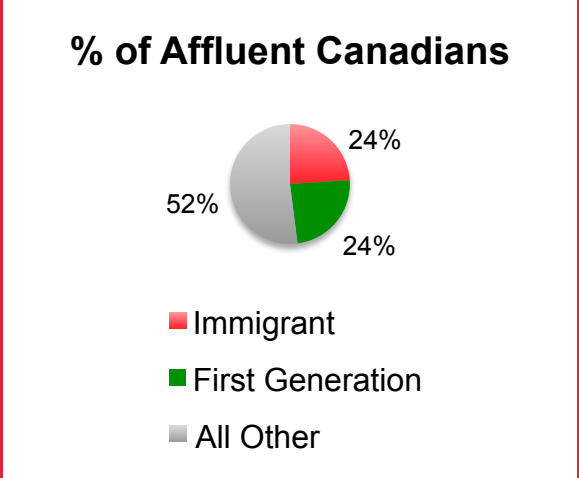
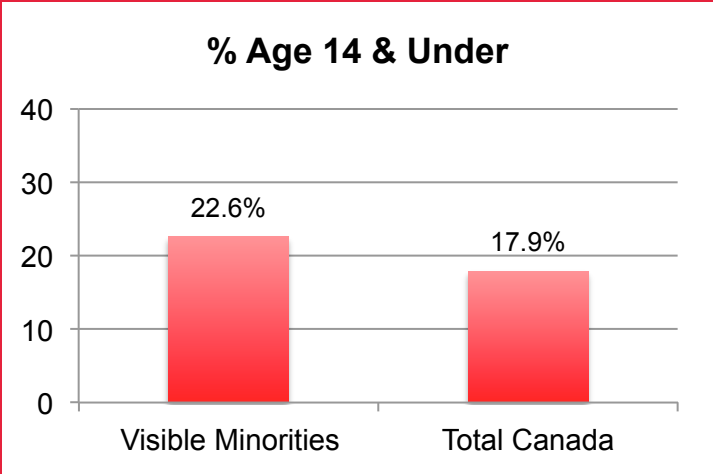
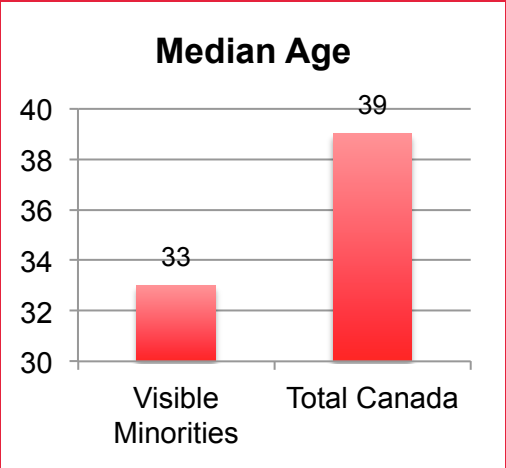


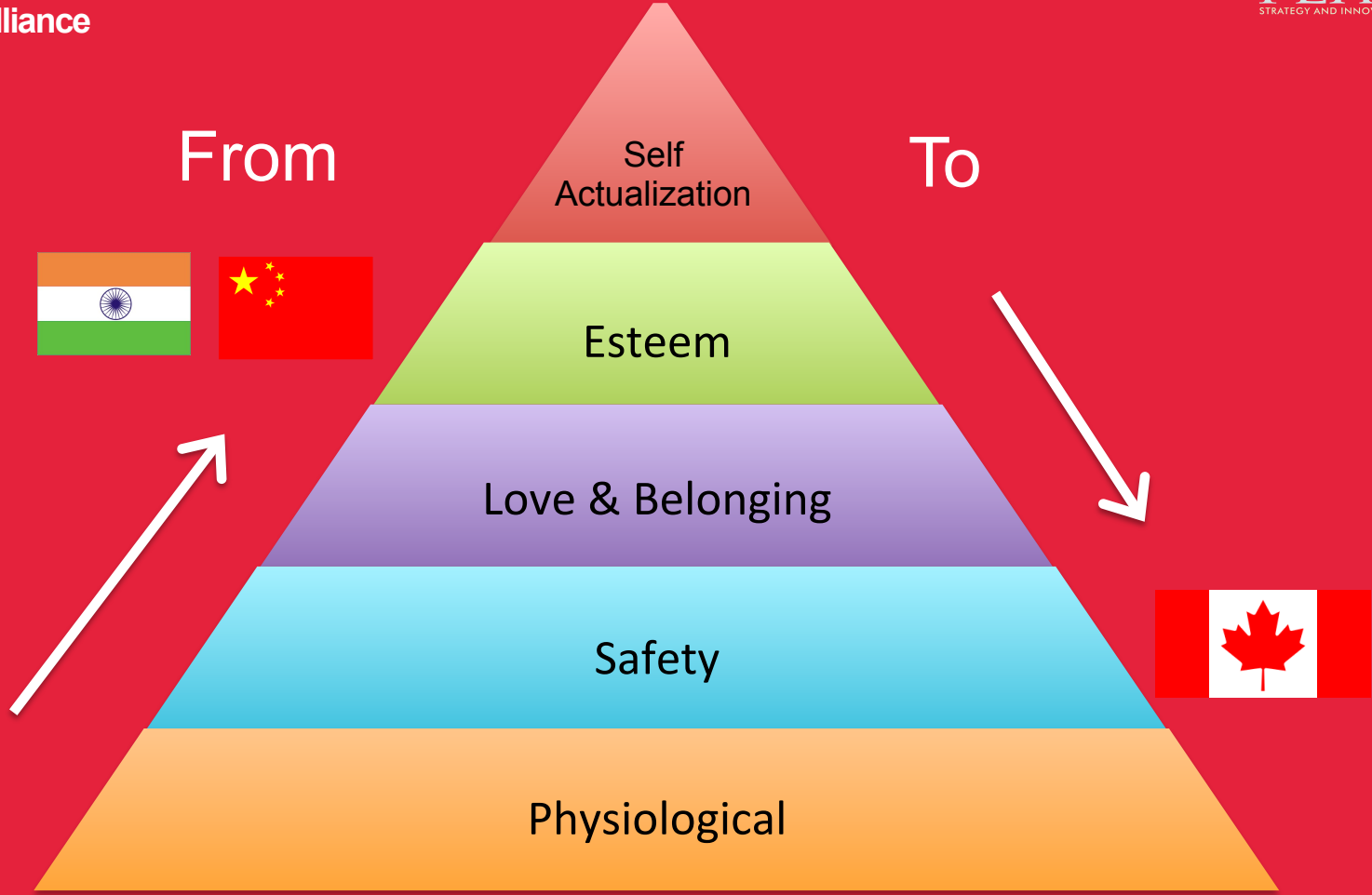
Source: Statistics Canada, 2010

Spending Growth By Visible Minorities



Source: Statistics Canada, 2010; Homescan data, 2012





New Canadians feel time starved as they perform many of the homemaking tasks previously performed by others in their home country.



Women struggle with feelings of loneliness in the first few years. Their perception is that there are few companies or brands trying to help them.





South Asian



This is a story about Paramjeep.

Born in India, Paramjeep has been living in Mississauga for 7 years with her husband and 3 kids, two sons who are 8 and 5, and a daughter 3.

Her family, (originally an upper middle class family in India) came to Canada to move beyond the environmental and political conditions in India.

Paramjeep wants her children to have a better life.

Paramjeep is a homemaker now, but is university educated and has a high propensity for learning. Since coming to Canada she enjoys her new found independence.

Paramjeep's large circle of friends would describe her as an energetic, healthy person who strives to be successful.



Early on South Asians tend to go with familiar brands from their home country. As they acculturate they become brand explorers.





South Asians are quick to ramp up their social network as they are very social people. Word of mouth and referrals are very influential to their purchase decisions.





Most South Asians are well educated and maintain their learning orientation as they are constantly seeking to be their very best.





Functional

I want to get to my best health.

I need ways to save time.

Emotional

I want to feel confident.

I want to be my best.

Social

I want to be energized by those around me.

"I have always been health conscious. It is very important to me. I do read a lot of ingredient lists as far as food is concerned ... I try to get natural products."

"I never used this in India. This is an instant curry. There you make everything from scratch. These are so convenient, so I started using these."

"That's why I send people out of the house so that nobody sees me cleaning because I don't think it's the best of me that they're seeing."

"Social life in India was all about unplanned visits from friends and family. We would open our doors ... Our festival celebrations, sometimes they would include an entire village."



Television



Radio



Newspapers



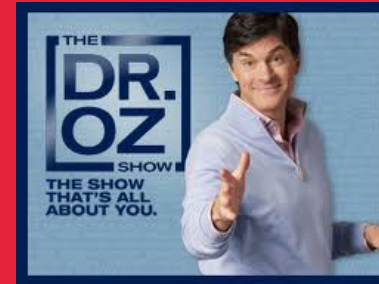
Google



Friends



**Books &
Magazines**



Experts



Chinese



This is a story about Amy.

Born in China, Amy has been in Canada for 8 years. She now resides in North York with her husband, 10 year old son and 6 year old daughter.

Amy's family came to Canada because her husband wanted to pursue his IT career. Amy also wanted more for her children. In her words, "school is too stressful for kids in China."

Amy is a homemaker now, but was a teacher back in China. Amy is still getting used to the slower pace of life in Canada.

Amy would describe herself as a person who values being efficient and prides herself in making smart decisions.



The Chinese place high value on knowledge and will seek out facts and data to help them make big decisions. Popular brands and expert recommendations are ways they make informed decisions without doing “all the research.”





The Chinese have a value orientation that reflects their need to be smart and efficient with their money. Quality trumps price, because a higher quality choice will save money in the long run.





The Chinese want to be perceived as successful, and will gravitate to brands and services that signal that to the outside world.





Functional

I want to live
a long life.

I need help
being
efficient.

Emotional

I want to
feel in
control.

I want to
make a
smart
choice.

Social

I need respect
from those
around me.

“The old traditional people say that if you drink cold water your circulation is no good ... They recommend the women to drink more warm or hot water... because after they deliver the baby they will keep way better, good health.”

“We have a very stable life so we do not change too much, but if something happens we can be flexible to change.”

“Costco is not like other stores ... I just go there and I know its ok.”

“Back in China, everyone was chasing after money. The busier you are, the more respect you get.”



Television



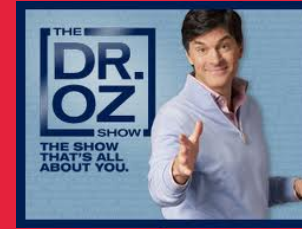
Newspapers



Internet



Google



Experts



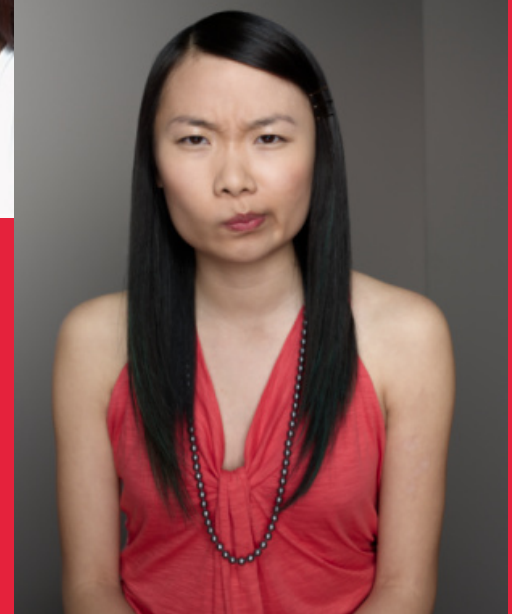
Friends



Magazines

WHAT NOW?

1. Understand where your brand fits in their journey along Maslow's hierarchy
2. If necessary, optimize your positioning to deliver against their specific cultural needs
3. Consider how your choice of media and language signals your brand's intention to address an existing home country or acculturation need



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