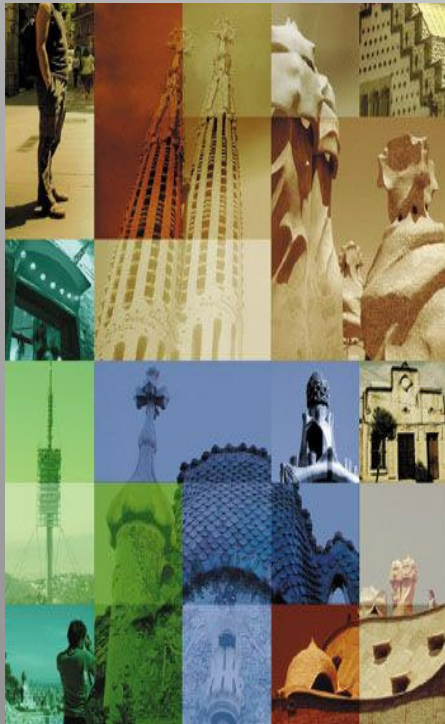


Synovate Hotspots Canada



lifeto life



Bringing
Canada
to life



Bringing Canada life to life

- This document is designed to give you an overview of Canada, its people and some of the key issues and trends Synovate is observing in the country today.
- The core source of information is ‘LifeWorlds’ (Synovate’s ethnographic approach), but it is complemented with Synovate’s broader understanding of this country’s culture.
- Following a brief introduction, our discussion has two main parts:
 - “Big Ideas”: insights into Canadian culture and consumers
 - Implications for research

Some numbers

- Total Population : 31,612,987 (2006)
- Established 1867
- 10 provinces, two territories
- National capital: Ottawa
- Two official languages: English and French
- Parliamentary system: Federal government and each Province and Territory has their own parliament.
- A commonwealth country
- Top 4 cities and populations (2006)
 - Toronto: 5,113,149
 - Montreal: 3,635,571
 - Vancouver: 2,116,581
 - Ottawa: 1,130,761

Some more numbers

	<u>Toronto</u>	<u>Montreal</u>	<u>Vancouver</u>	<u>Ottawa</u>	<u>Canada</u>
<i>Population size (2006)</i>	5,113,149	3,635,571	2,116,581	1,130,761	31,612,897
<i>Age</i>					
Under 25	32%	30%	30%	31%	31%
25-50	39%	38%	39%	38%	36%
50+	29%	32%	32%	30%	33%
<i>Average Income</i>	\$61,800	\$58,600	\$58,580	\$80,300	\$60,600
<i>Population size (2001)*</i>	4,467,960	3,380,645	1,967,480	1,050,755	29,639,035
Canadian	19%	56%	19%	44%	39%
English	17%	4%	24%	19%	20%
French	5%	27%	7%	26%	16%
Scottish	11%	3%	16%	14%	14%
Irish	10%	5%	12%	17%	13%
German	5%	2%	10%	6%	9%
Italian	9%	7%	4%	4%	4%
Chinese	9%	2%	18%	3%	4%
Ukrainian	2%	1%	4%	2%	4%
North American Indian	n/a	1%	2%	2%	3%

*Ethnic or cultural origins of respondents ancestors. Multiple mentions allowed.

Top 10 Canadian brands

- RBC Financial Group
- TD Canada Trust
- Petro-Canada
- Bell
- Shoppers Drug Mart
- Tim Hortons
- BMO Financial Group
- Canadian Tire
- Scotiabank
- Telus



Top 10 Canadian iconic brands

1. Cirque du Soleil
2. Tim Hortons
3. CBC
4. Roots
5. Toronto Maple Leafs
6. Montreal Canadiens
7. Calgary Stampede
8. IMAX
9. CN Tower
10. Terry Fox

CIRQUE DU SOLEIL



A single dream. A world of hope.
The Terry Fox Foundation
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Top 5 “Impact” brands in North America

1. Apple



2. YouTube



3. Google



4. Starbucks



5. Facebook





Section I: Big Ideas

Bringing Canada to life: “Big Ideas”

Insights into Canadian culture and consumers

- Multi-Cultural but not a Melting Pot: Canada is a nation of immigrants but its focus is not on blending these cultures but celebrating a cultural diversity that encompasses both Europe and Asia.
- Neighbourly Relations: Canada has a deep friendship with its southerly neighbour – but Canadians go to great length to point out that they are not anything like Americans!
- Age and its Implications: Canada’s aging population is about to have far-reaching affects on the nation’s political system and economy.
- Countries Within a Country: Canada’s three major cities (Toronto, Montreal, and Vancouver) are a study in contrasts.

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Multi-cultural: A nation of immigrants

- The roots of Canada's multi-culturalism are in its history as a nation of immigrants
- Immigration continues to shape Canada's future with more than 1,000,000 immigrants arriving since 2002 and 20% of all Canadians are foreign born.
- The foreign born population is growing four times as fast as Canadian born.
- More than 150 languages are spoken in Canada: English French and Chinese spoken most, then Italian, Punjabi Spanish, German and Tagalog.
- Canada's embrace of cultural diversity is consciously distinct from America's "melting pot" concept – the goal being to create vibrantly co-existing traditions vs. one homogenous national identity.
- This diversity is not achieved without tension and recent years have seen growing resentment amongst those from "founding", Western European nations.

Multi-cultural cultural icons

- Canada traditionally straddled Europe and America taking fashion, food and artistic cues and trends equally from both.
- Today Asia and the subcontinent play an increasingly dominant role:
 - We are not only Hollywood north but Bollywood west
 - Canada is the second most important market for Chinese pop artists
 - Korea is the fastest growing trade partner and is increasingly important for cultural exchange
- Canadians still have to leave home to make it “big” and numerous have, selling culture that combines a diverse set of cultural influences that is uniquely Canadian:
 - John Candy
 - Jim Carrey
 - Celine Dion
 - Avril Lavinge
 - Nelly Furtado
 - Cirque du Soleil
 - Leonard Cohen
 - William (beam me up) Shatner!



Multi-cultural: Quebec and francophone Canada

- Quebec is one of the best examples of Canada's cultural diversity
- The majority of Quebecois speak French.
- Fiercely proud of traditions and language but still North American.
- Entirely different media habits including three french Quebec networks.
- A more European feel, laid back and open but Catholic roots.
- Distinct foods...e.g. poutine and tourtiere.
- Separate "star" system than the rest of Canada – own award shows. More well-known in France than in Canada.



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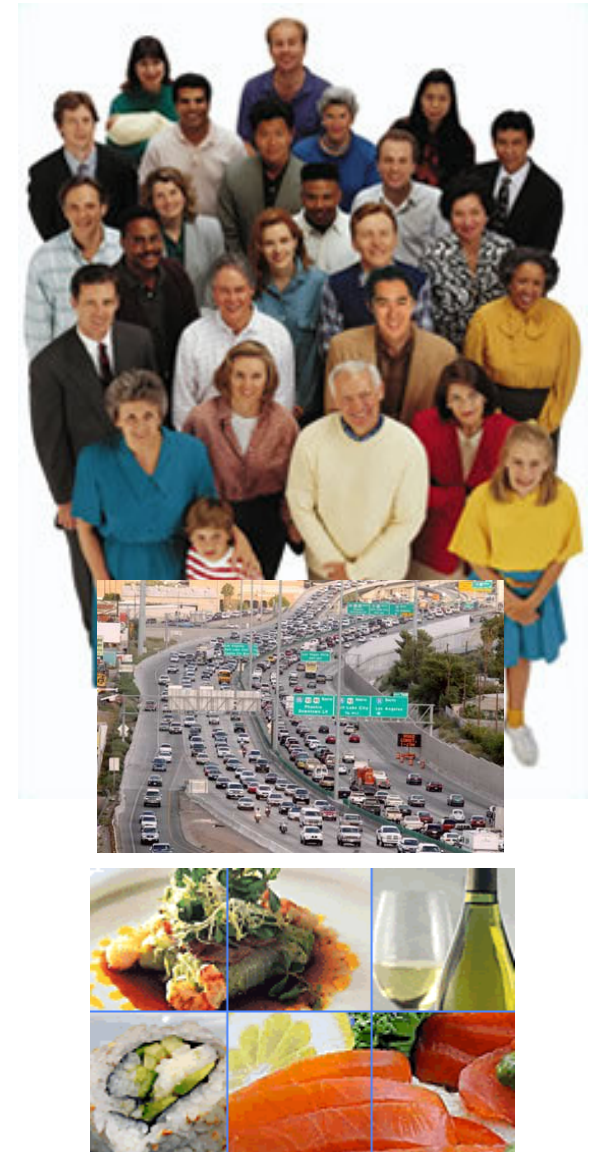
Neighbourly relations: The influence of the USA

- 90% of the population lives within 3 hours of the US border- we can't help but absorb and sometimes aspire to the "dream"....
- Canadians live a life very similar to Americans, though few would admit to it:
 - The majority of households have two working persons.
 - Women have very high participatory rates in the work force.
 - We strive to own our homes. We are materialists but not without soul.
 - Canadians are concentrated in urban areas
 - Canadians' consumer behaviour similar to Americans in many ways
- Canada and America's deep friendship finds physical expression in the longest undefended border in the world
- We are not envious of our neighbours but rather, relish our independence.



The elusive Canadian identity

- Canada is not a deeply religious country, and there is no central Canadian faith.
- There are no Canadian national food rituals, nor truly national dishes that are mainstays of Canadian culture and unity.
- We are not flag wavers, we are not nationalistic – we go about our day to day lives with a very much 9-5 Monday to Friday attitude and way of life.
- Canadians see their national attributes as more unassuming than emphatic: friendly, peaceful, polite and modest
- One celebrated and distinctly Canadian area is the sport of ice hockey which is a source of national pride and obsession
- Our climate has helped shaped both our individualism and our collective will.

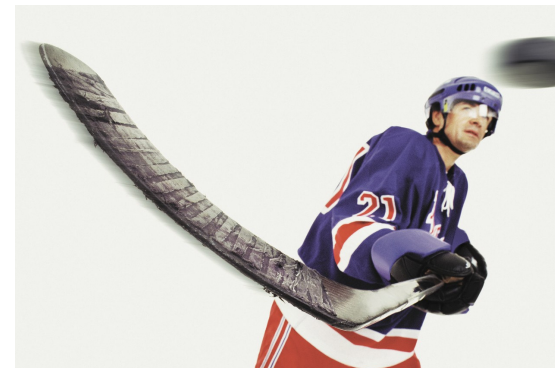




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Neighbourly relations: Defining ourselves as NOT American

- While the US is a huge influence on Canada, Canadians see themselves as very different from Americans and to a certain extent define themselves as being what Americans are not.
- For example, Canadians concept of social welfare and social justice are very different from Americans: universal healthcare is a fiercely defended system which many feel is emblematic of Canada's social values
- Canadians see themselves as a nation of peacemakers vs. their sometimes aggressive neighbour to the south



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Age and its implications: An aging population...

Age	Males		Females	
	Number	Per cent	Number	Per cent
0-4	864,600	2.7%	825,940	2.6%
5-9	926,855	2.9%	882,520	2.8%
10-14	1,065,860	3.3%	1,014,060	3.2%
15-19	1,095,285	3.5%	1,045,205	3.3%
20-24	1,047,950	3.3%	1,032,435	3.3%
25-29	975,945	3.1%	1,009,635	3.2%
30-34	987,730	3.1%	1,032,515	3.3%
35-39	1,083,495	3.4%	1,124,780	3.6%
40-44	1,285,535	4.1%	1,324,925	4.2%
45-49	1,290,125	4.1%	1,330,470	4.2%
50-54	1,158,970	3.7%	1,198,330	3.8%
55-59	1,026,395	3.2%	1,058,230	3.3%
60-64	780,135	2.5%	809,730	2.6%
65-69	593,810	1.9%	640,770	2.0%
70-74	493,460	1.6%	560,320	1.8%
75-79	386,485	1.2%	493,095	1.6%
80-84	251,420	0.8%	395,285	1.3%
85+	161,930	0.5%	358,680	1.1%
Totals	15,475,970	49.0%	16,136,930	51.0%

An Aging Population

- Canadians' median age is already 40
- Baby boomers (those born after 1945) will comprise close to 40% of the population at current population trends.
- Unprecedented numbers of baby boomers will turn age 65 in 2011.

....Creates pressures and opportunities

Implications of aging population for the social contract:

- Canada Pension Plan and Healthcare system will be especially will be strained.
- Health care eats 40% of budget and will increase year over year.
- New legislation ends mandatory retirement and many will continue to work as they will still be in demand (see next page).

Opportunities for service providers (private and public):

- Seniors are wealthy, not afraid to spend. They are savvy and organised and powerful political clout.
- They grew up in an era or live-human customer service and want respect.
- Discriminating elder population will drive demand for more personalized and customized service delivery in health care services.
- Greater emphasis on prevention: e.g. Sports and nutrition products



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Age and its implications: increased pressure on universal health care

Universal in thought but in reality forced into two tier

- We can no longer pretend that our Health Care system works.
- Wait times are increasing and so are the numbers of Canadians willing to spend their money to cross the border to the US for treatment.

So what?

- Losing our health care system will take away a key cultural identifier.
- It will, however, provide growth opportunity and need for increasing numbers of medical community not addressed,

Implications :

- Medical Tourism
- Increased need for Medically trained immigrants



Age and its implications: Labour force

An Aging Population and few replacement workers

- Canada's old age population bulge means there have been chronic labour shortages since 2003.
- Partial attempts have been made to address this by encouraging skilled and semiskilled workers to immigrate to Canada on short term ,2 year work visas

So what?

- If not properly addressed the labour shortage will continue to fuel inflation, interrupt work or cancel work on necessary mega infrastructure projects.
- Labour shortage has already decreased GDP by .6 percentage points.
- Fewer younger workers will not provide the critical mass of consumers nor will they provide the critical mass of tax revenues necessary for universal health care and social assistance programs.

Implications :

- Youth will be served. They will be a precious commodity – service sector increasingly underserved. Careful if you depend on face to face in store service.



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Toronto snapshot

- Largest city in Canada.
- The unofficial financial and power capital of Canada.
- All major products are launched in this market
- Traditional and Conservative by nature - influenced by the east and central Coast of the US.
- A city of proud neighbourhoods.
- In essence, Canada's New York.
- Ethnically diverse – make a point of celebrating different cultures. Euro, Caribbean, Asian
- Thought of as the economic engine of Canada but now replaced by Alberta Oil.
- Striving and achievement are highly valued.



Montreal snapshot

- A European oasis in North America.
- Vibrant, sexy, fashion leading centre of Francophone Canada.
- Bilingual but French is the dominant language by law.
- Centre of all things francophone arts and culture.
- English speaking pockets of residents
- Established 17th Century
- Easy going and liberal – dinner and nightlife always later than the rest of the country.



Vancouver snapshot

- Often referred to as the left Coast: birth of flower power in Canada.
- Secessionist attitudes and a certain smugness about the outdoor lifestyle, green and organic way of life,
- Pacific Rim jewel seems to have more in common with Hong Kong and L.A than other places in Canada.
- Canada's most beautiful city!
- Huge Asian influx: up to 90% are Chinese in some municipalities.
- Cosmopolitan but an understated San Francisco.
- A gateway to famed tourist locations such as Whistler and Victoria
- Seattle is only 3 hours south - over 1,000,000 car trips to Vancouver.
- Most expensive real estate in Canada but also voted most livable city in the world.
- Home to the winter Olympics in 2010.





Section II: Implications for research

Implications for qualitative research in Canada

- Be aware of the city you are choosing – it may not be representative of the whole country!
- In Canada there are three principle markets: Vancouver, Toronto, and Montreal (which is French speaking dominant). Important to remember that our attitudes and preferences DO NOT align East West across Canada but North South.
- Vancouver aligns with the US west Coast, Toronto with East Coast and Montreal - Europe
- Toronto is the default English speaking market.
- Groups usually start at 5:30 or 6 pm and 7:30 or 8 pm
- Incentives start @\$75 and go up
- Consumers are research savvy – tough to find qualitative virgins – recruiting costs are rising.
- There will be an Ethnic mix in almost all groups but do not try “understand” the Chinese segment, for example, by having a token representation in a mixed group.
- With the exception of a few cultures, respondents are pretty much open to experimenting with techniques and tools.
- We are, however, polite!

Launching products in Canada

There is greater opportunity for new products in Canada if they ...

- Reflect the differences between English and French Canada.
- Encourage cultivation of the Canadian multicultural-tolerant identity. We are not a melting pot.
- That we are NOT Americans, but we appreciate who they are.
- Help us laugh at ourselves or at those who think they know us.
- Acknowledge our contributions to the world (because we're too polite to draw attention to ourselves!)

Bringing lifetolife



Thank you