



NEW  
CANADIANS  
RESEARCH

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Source: Statistics Canada, 2016 Census Data

# BACKGROUND

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2/3 of Canada's population growth from migration



1.12 MM of 1.7 MM total growth from newcomers



By 2056, immigration is predicted to be the sole driver of Canada's population growth

# RESEARCH OBJECTIVES

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Understanding the newcomer journey by exploring their:



## CULTURAL MINDSET

Values, feelings upon arrival and how they maintain or adapt their cultural identity.



## MEDIA CONSUMPTION

Differences between New Canadians and Non-New Canadians; language, content and device preferences



## SHOPPING HABITS

Beauty; grocery; travel; autos; banking; telecommunications

# SOME FINDINGS WE LEARNED PREVIOUSLY

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## Highlights from 2014 study, how will these compare to 2017?

Accessible media is key

Smartphone dominant

Brand education is vital

Price sensitive

Balance of adopting “Canadian” practices and maintaining country of origin practices

Language preference leans to English

Heavy users of Yahoo, Google and YouTube

# METHODOLOGY

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## > QUANTITATIVE

*March - April 2017*

*Sample:* New Canadians (n=920) – those who came to Canada less than 5 years ago

**Age:** 18-69

**Region:** British Columbia (n=254), Ontario (n=482), Quebec (n=181), Alberta (n=3)

**Cultural background:** South Asian (n=215), Chinese (n=215), European (n=120), Filipino (n=133), African/Middle Eastern (n=21), South/Central American (n=102)

Canada-born (n=223)

## > QUALITATIVE

*May 2017*

*Sample:* New Canadians (n=15)

**Gender:** 7 men; 8 women

**Age:** under 29 (n=5); 30-39 (n=7); 40-49 (n=2); 50+ (n=1)

**Area of Origin:** South/Central American (n=4); Middle Eastern (n=2); Asian (n=3); South Asian (n=5); African (n=1)


**# of years living in Canada:** less than 2 years (n=4); 2-3 years (n=8); 3 to 5 years (n=3)



# 1

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## CULTURAL MINDSET

A young boy in a green inflatable ring and a young girl in a pink inflatable ring are floating in a swimming pool. The boy is on the left, wearing red and black goggles, with his right arm raised. The girl is on the right, wearing pink goggles and smiling. The water is clear blue with ripples. A white text box is centered over the image.

Immigration to Canada  
is largely driven by  
**opportunity.**

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“

We moved to  
Canada so that  
we could  
provide a  
**better**  
—  
experience for  
our kids.”

— Female, 32 Pakistan



**Oath:**  
A Verizon company



# DIFFERENCE IN ACTIVITIES BETWEEN CANADA BORN AND NEWCOMERS

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## > CANADA BORN

1. Watching TV
2. Playing video games
3. Going out for dinner
4. Sports & rec

## > NEW CANADIANS

1. Places of worship
2. Language classes/continuing ed.
3. Art galleries/museums
4. Hosting dinners for guests



# OUTLOOKS OVERLAP

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## > CANADA BORN

Describe themselves as:

1. Organized
2. Responsible
3. Independent

## > NEW CANADIANS

Describe themselves as:

1. Responsible
2. Independent
3. Happy



# ADOPTION VS. TRADITION

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**50%**  
Balance



**25%**  
Adopt

**25%**  
Maintain

The majority of New Canadians try to *balance* adoption of Canadian lifestyle and maintaining their culture and traditions.

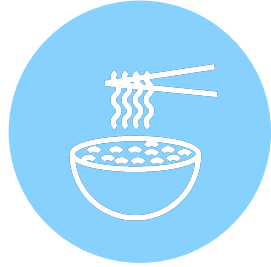
# WHAT THEY MAINTAIN

Top things New Canadians maintain to preserve a connection with their culture



## HOLIDAYS

62% of new Canadians continue to celebrate traditional holidays



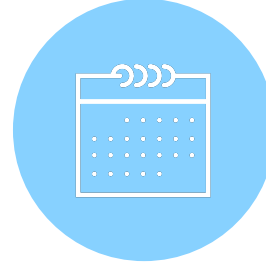
## FOOD

60% of new Canadians cook traditional foods from their home country



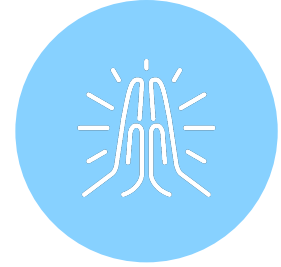
## NEWS

47% of new Canadians follow local news from their country of origin



## EVENTS

46% of new Canadians attend cultural events and festivals.



## RELIGION

41% of new Canadians visit places of worship.



“

Buying more Canadian

**clothes,**

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drinking Canadian coffee and  
eating Canadian foods.



“

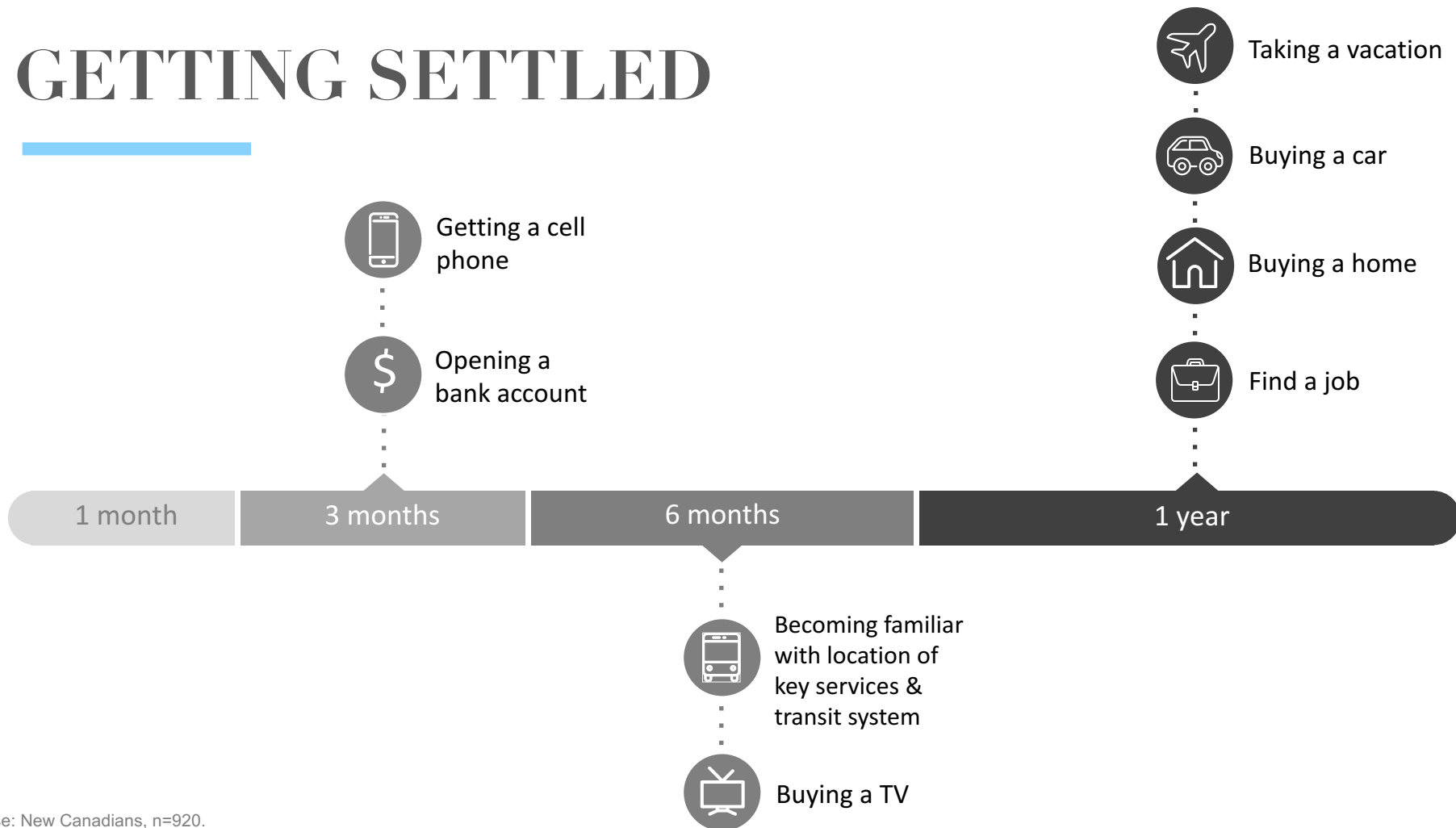
To be Canadian, you need to  
learn how to say

**sorry &  
thank you**

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for everything without reason.

# GETTING SETTLED



Base: New Canadians, n=920.

P8. How long did it take you to do the following after coming to Canada?



# 2

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## MEDIA HABITS



# EDUCATE & INFORM



New Canadians **want to know** about Canada and how to succeed in making it their home

*“My family and I did a lot of research about Canada, the culture and the work environment before we moved to Canada. We tried to learn as much as possible about the country so it wouldn't be a surprise or a shock after”. – Female, India, 53, Vancouver*



**Ads** help New Canadians learn products/services most used by “Typical Canadians.”

New Canadians  
perceive media as  
a valuable  
tool

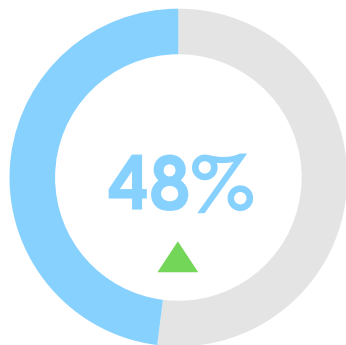
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in adjusting to their  
new lives

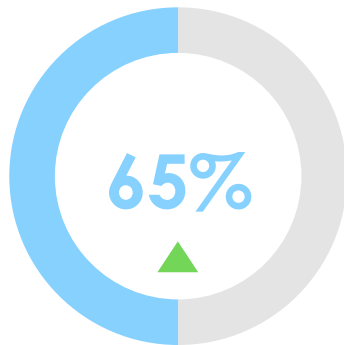


# ACCESSIBLE MEDIA DOMINATES

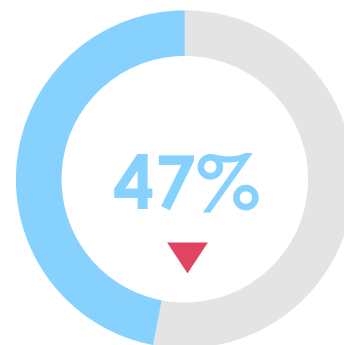
NEW  
CANADIANS



Use their smartphone  
daily for **3+ hours**

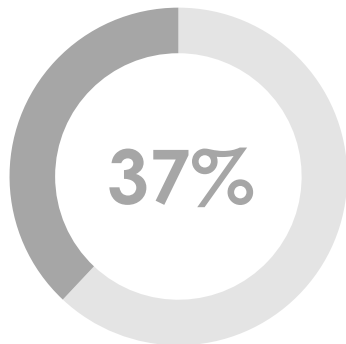


Watched **free**  
streamed/downloaded video  
content daily

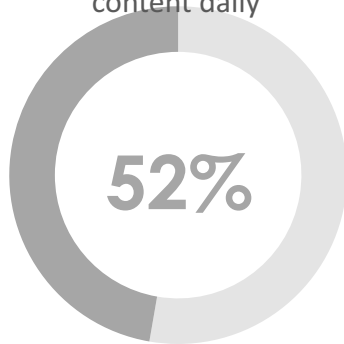


Watched **paid** subscription-  
based video streaming services daily

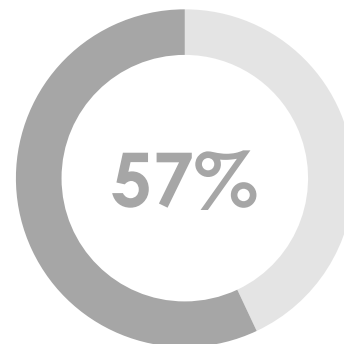
CANADIAN-  
BORN



37%



52%



57%



Significantly

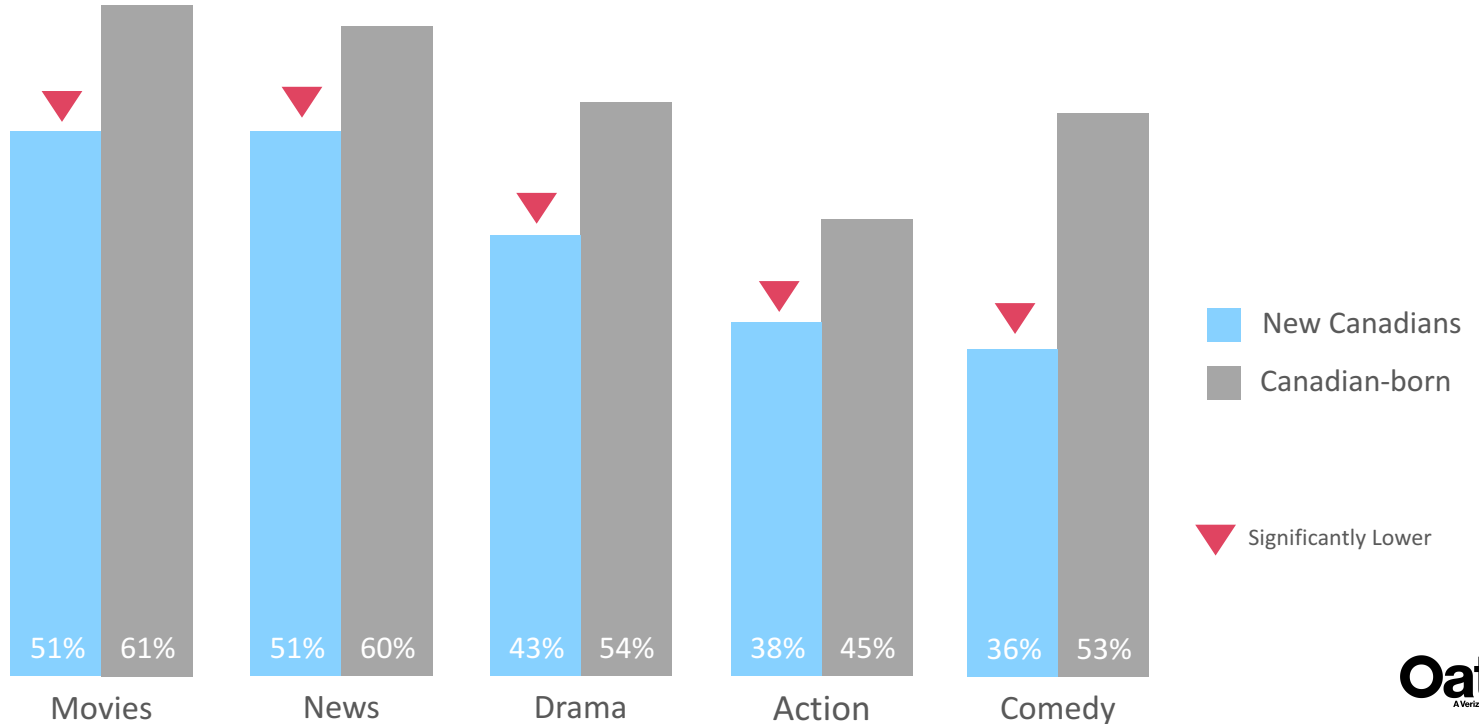


Significantly Lower

**Oath:**  
A Verizon company

# TV LESS ROUTINE FOR NEWCOMERS

Which of the following media content categories to you watch regularly on TV?



Base: New Canadians, n=442; Canadian-born, n=223.  
M8. Which of the following media content categories do you watch/read regularly on TV and Online?



# AV CONTENT ATTRACTS NEW CANADIANS

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Preferred Format – Digital Content in English or French

## NEW CANADIANS

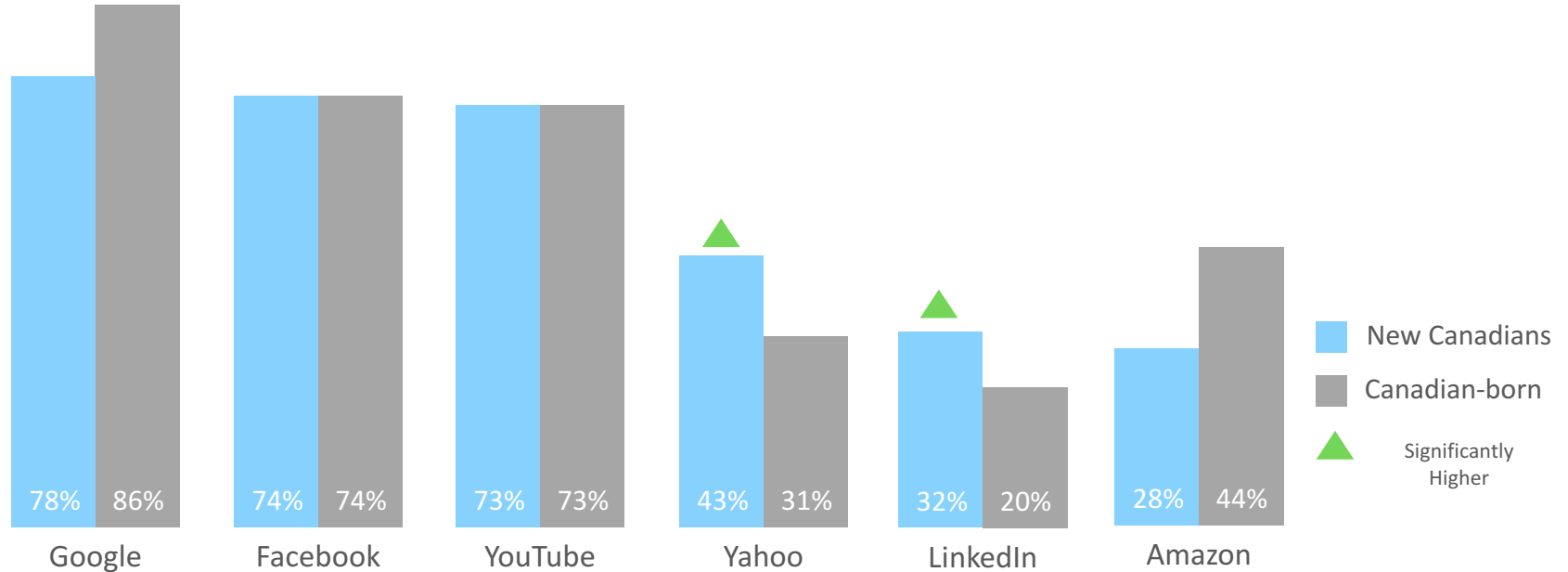
1. Videos (< 2 minutes)
2. Images
3. Audio

## CANADIAN BORN

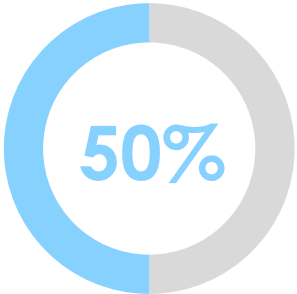
1. Images
2. Videos (< 2 minutes)
3. Article (< 2 minutes to read)

# HIGHER AFFINITY FOR YAHOO AND LINKEDIN

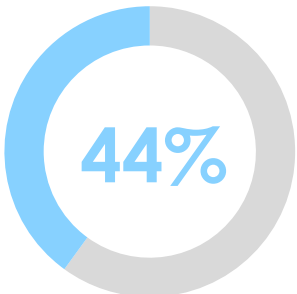
% Who visit sites at least once a week



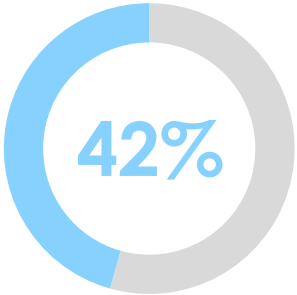
# CONTENT PRACTICES



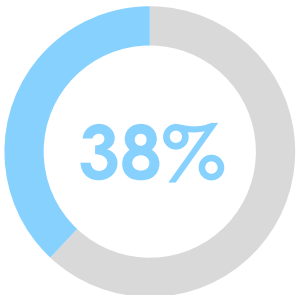
Actively seek out news from country of origin



Prefer to read online news in my native language



Prefer to read newspapers and magazines in my native language



Willing to pay for native cable TV channels

ES-30: New Canadians, n=442.

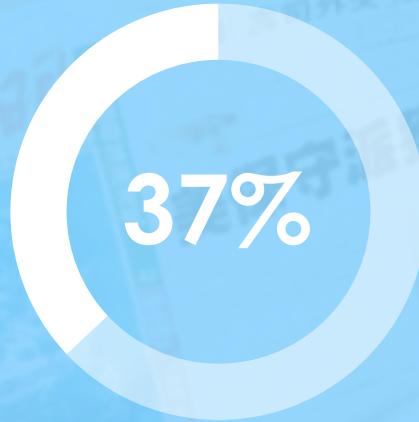
M11. Please indicate whether you agree or disagree with each of the following statements about your media habits in general

# LANGUAGE IS A BALANCE

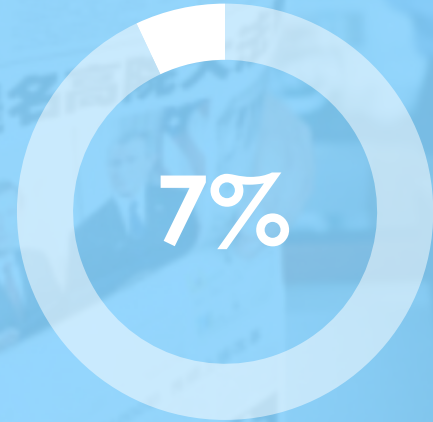
Share of language in which media content is consumed



ENGLISH



NATIVE LANGUAGE

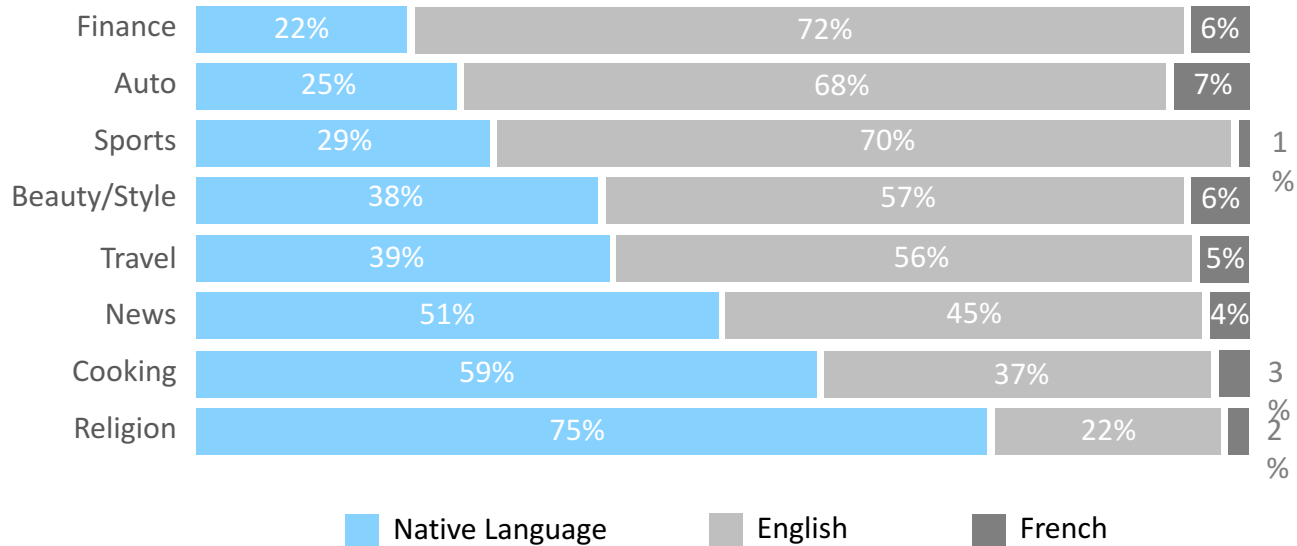


FRENCH



# LANGUAGE VARIES BY CONTENT

Language preferences according to content category



# Smartphones

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are seen as an integral part of the immigration process, acting as both computer and communication device to bridge the divide.



# Smartphones

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are seen as an integral part of the immigration process, acting as both computer and communication device to bridge the divide.

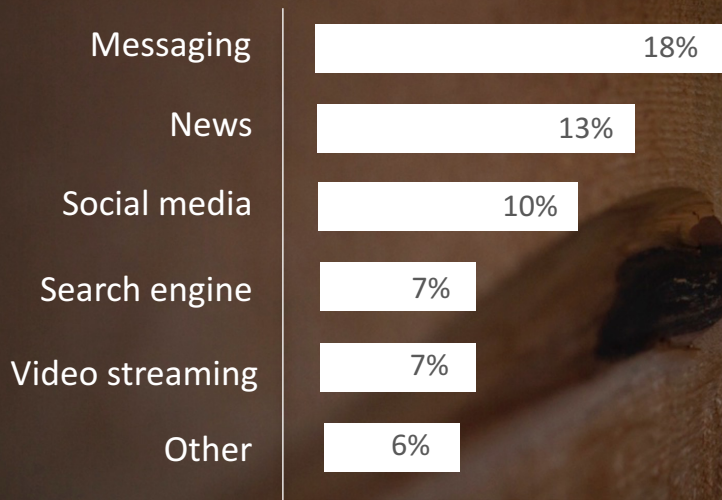
“Smartphone gives a quick access, anywhere you are, anytime of the day, to media. I've used my smartphone here in Canada more than I did before moving here.”

– Female, Philippines, 26, Saint-Hubert



# 40%

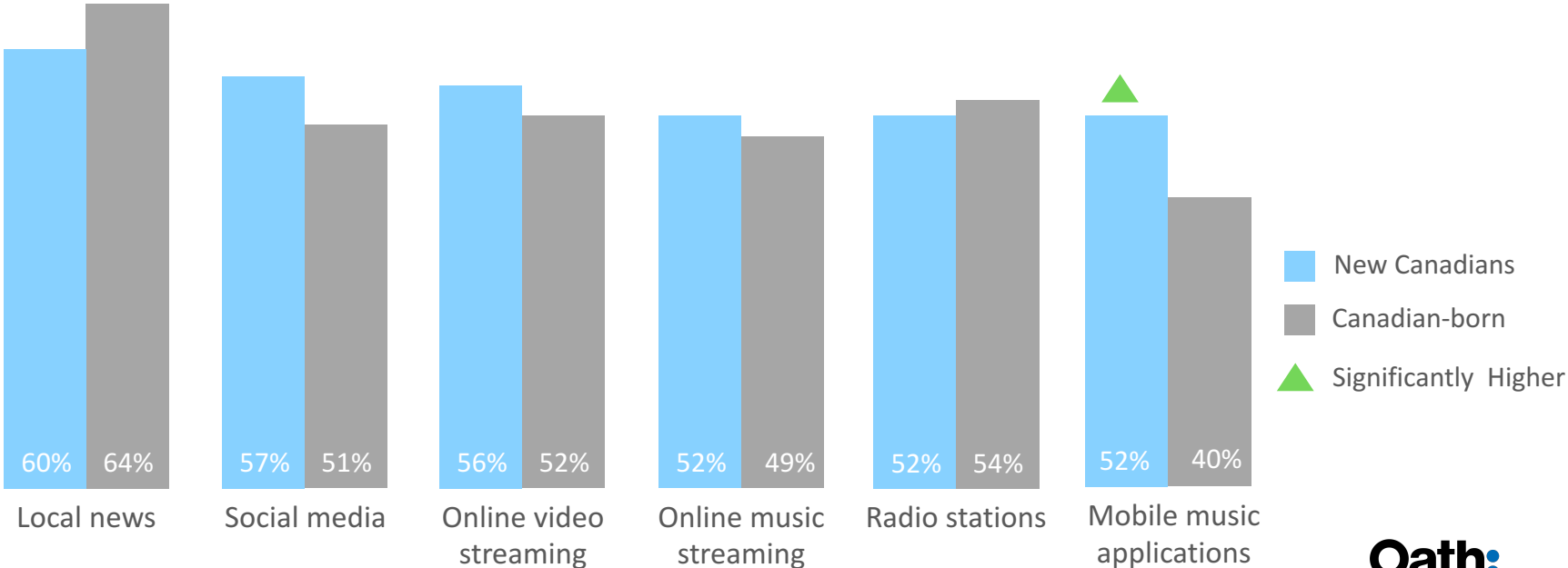
New Canadians use apps from country of origin, which are mostly messaging apps



*Usage of apps from country of origin*

# SATISFACTION WITH CANADIAN MEDIA IS SIMILAR TO NON NEWCOMERS...

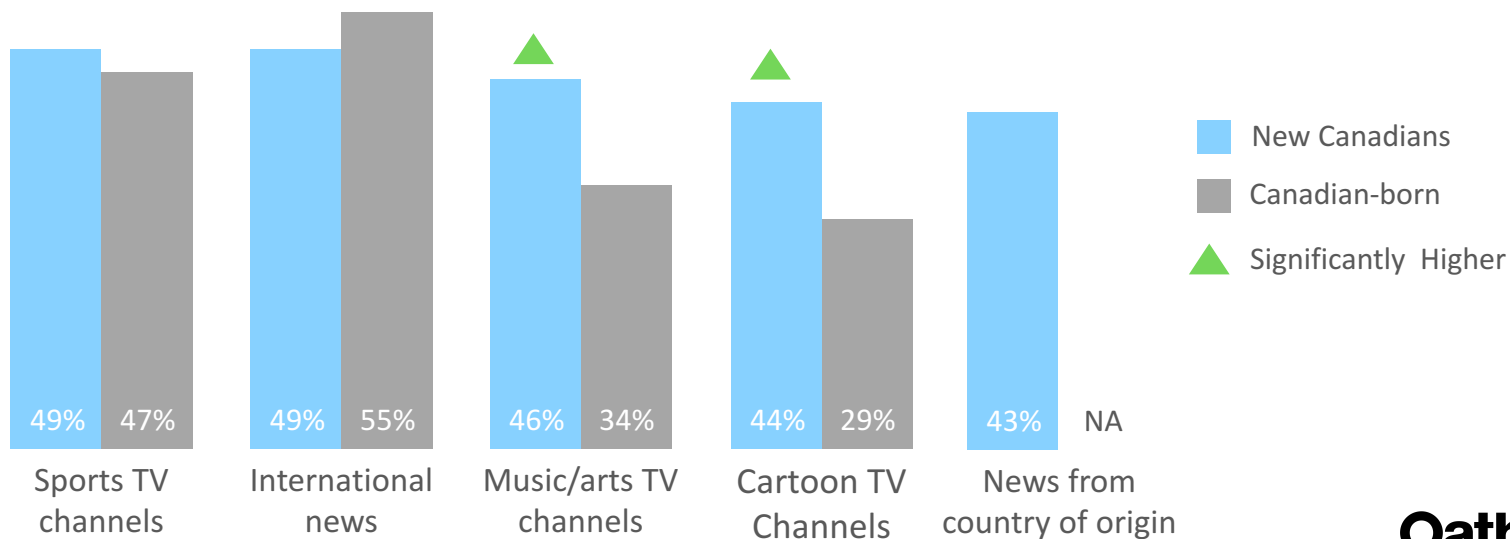
% Satisfied with Media in Canada



Base: New Canadians, n=442; Canadian-born, n=223.  
M12. Please indicate how satisfied you are with the following types of media offerings you are using in Canada

# ...AND SKEWS HIGHER FOR MUSIC AND CARTOON CONTENT

% Satisfied with Media in Canada



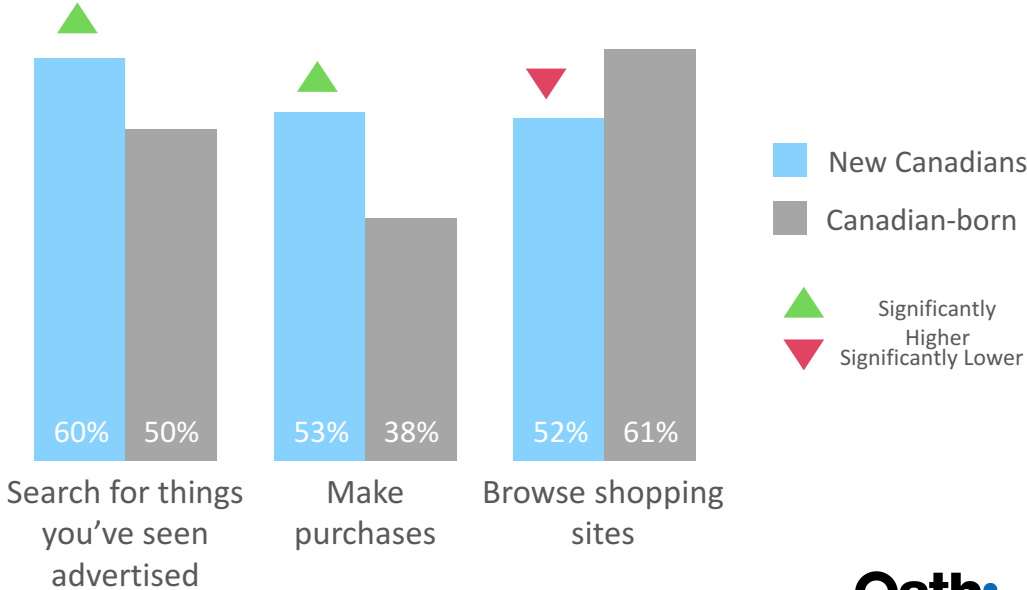
Base: New Canadians, n=442; Canadian-born, n=223.

M12. Please indicate how satisfied you are with the following types of media offerings you are using in Canada



# ACTIVE DIGITAL SHOPPERS

% Who carry out online activities at least once a week



Base: New Canadians, n=442; Canadian-born, n=223.  
M1a. How often, if at all, do you do any of the following online?



3

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# SHOPPING BEHAVIOUR



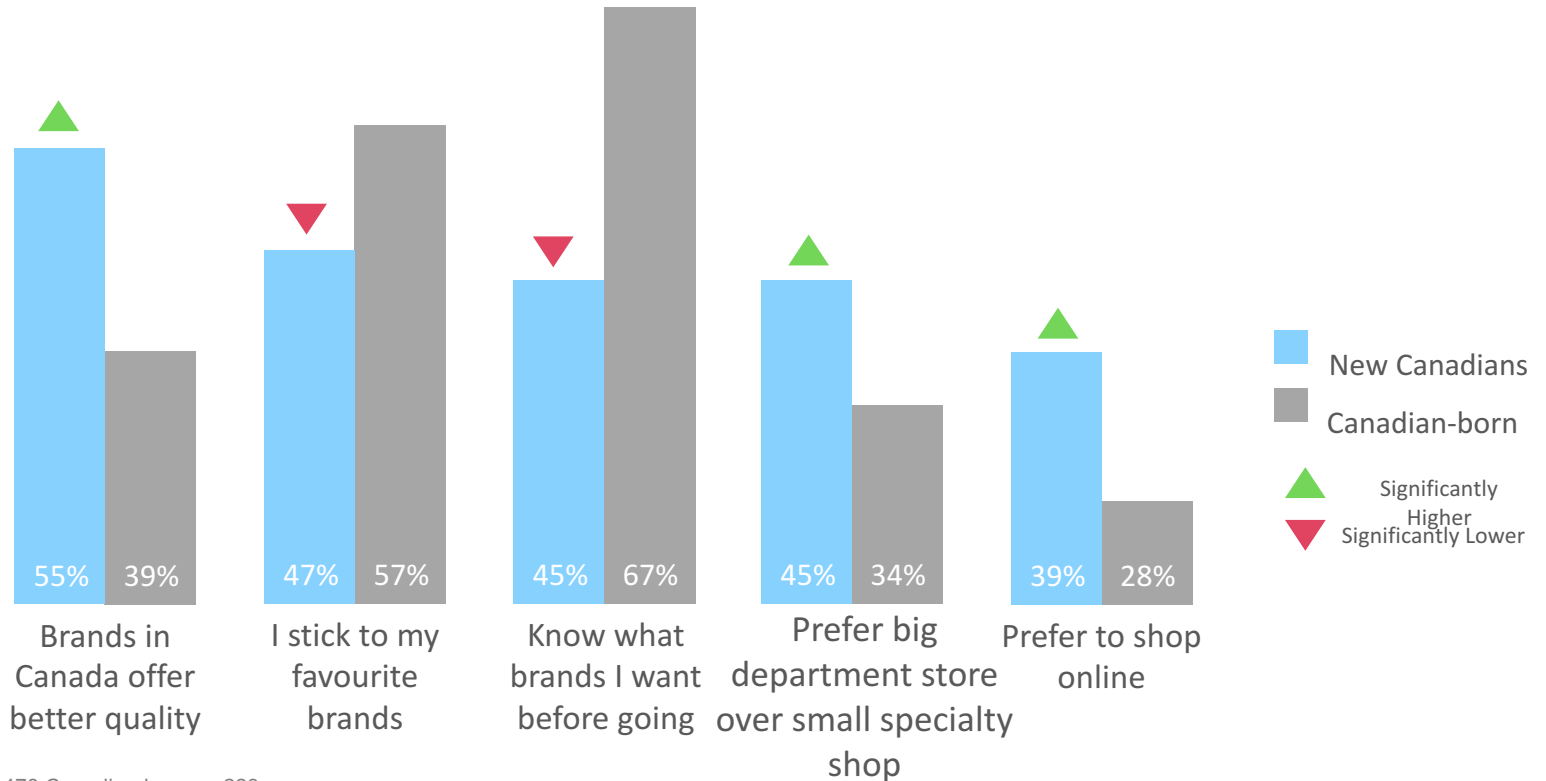
New Canadians  
shopping behaviour  
evolves over time as  
*experience,*  
*trust &*  
*confidence*

---

build up.



# NEWCOMERS ARE IDEAL AUDIENCE TO CONNECT WITH



Base: New Canadians, n=478; Canadian-born, n=223.

SG1. Please indicate whether you agree or disagree with each of the following statements about your shopping habits in general. (Strongly/Somewhat agree)

# How they build brand familiarity

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**Trial and error**



**Price and location**



**Advertising**



**Reviews**



**Big box as  
barometer**

# 1 in 2

New Canadians believe that brands should tailor their ads to the cultural diversity in Canada

I believe brands should tailor ads to ethnic diversity

54%

I pay more attention to ads in my native language

52%

I like brands more when their ads feature people with my cultural background

45%

I'm more likely to buy brands if ads in my native language

38%

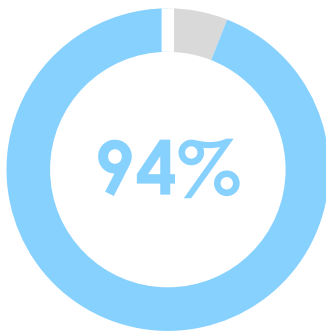


4  
—  
BEAUTY

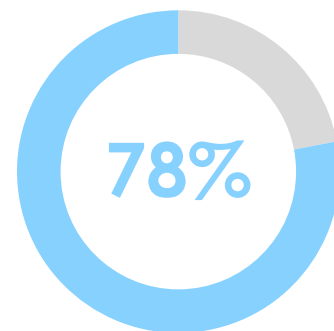


# BEAUTY REGIME

The majority of New Canadians adjusted their beauty regime to fit the available product offerings and Canadian weather



Started using at least some **new beauty products** since they moved.



Noticed at least some **differences in their beauty regime** since they moved

Base: New Canadians, purchase beauty products, and exposed, n=193.

BE1. Do you use the same beauty products in Canada as you did in country of origin?

BE1A. Do you use the same beauty regime (routine) in Canada as you did in country of origin?



“

I have started to give the  
utmost importance to my

skincare

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since I came here. The  
dryness here is too harsh for  
my skin.

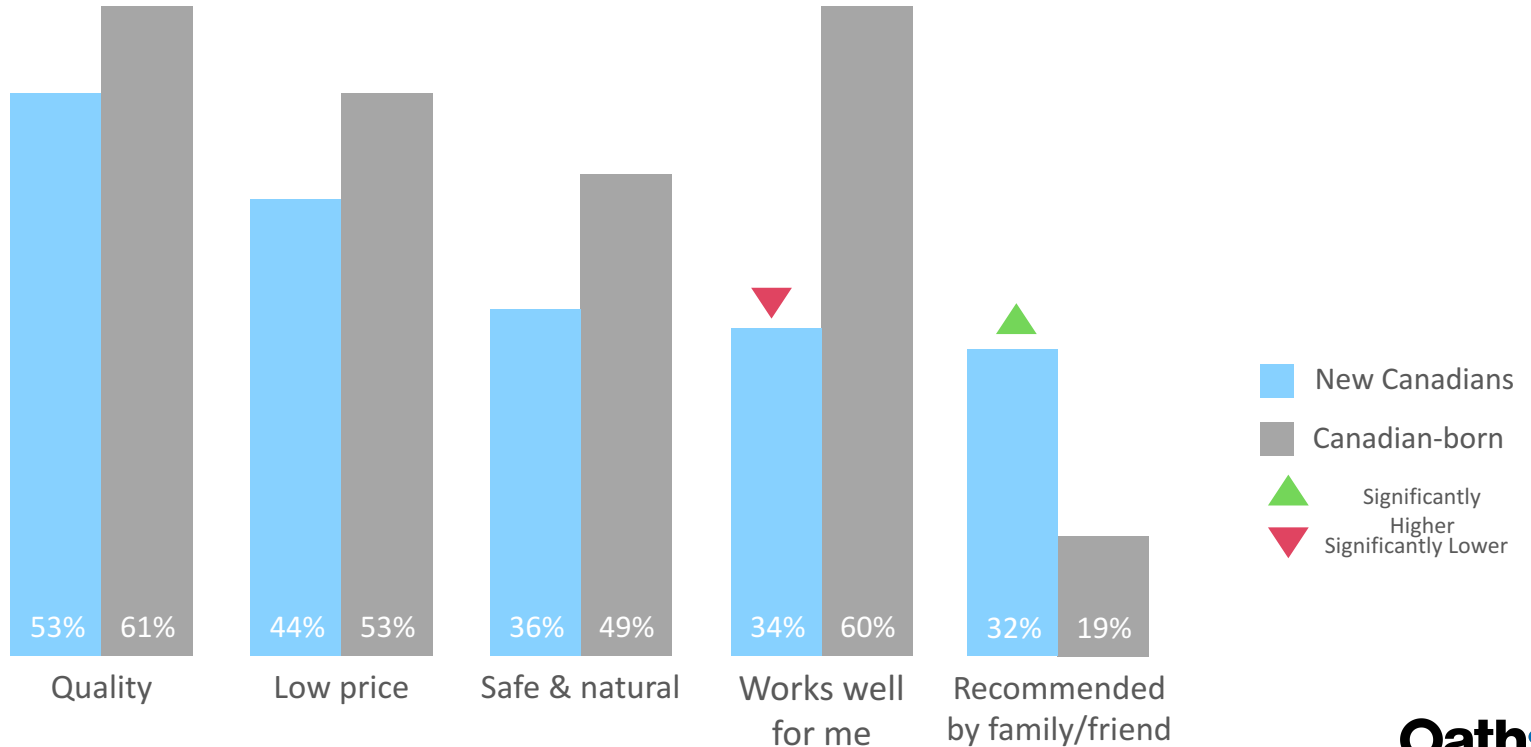
Base: New Canadians, purchase beauty products, and exposed, n=193  
Those whose beauty regime has changed, n=150.

BE2: In what ways has your beauty regime (routine) changed?

**Oath:**  
A Verizon company

# HOW DO YOU DECIDE WHAT TO BUY?

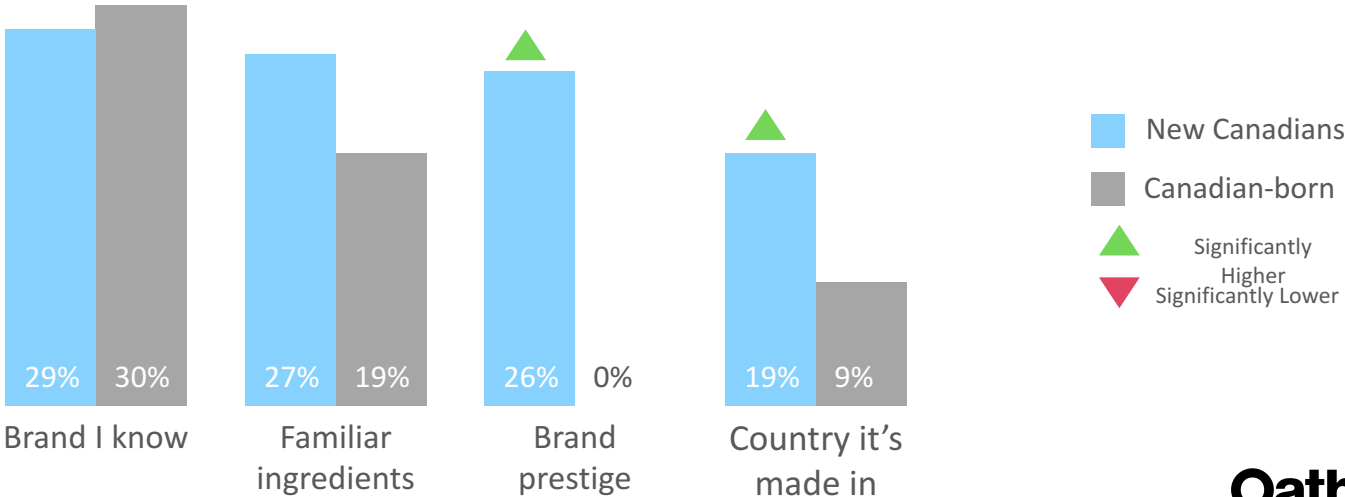
Slide 1 of 2





# HOW DO YOU DECIDE WHAT TO BUY

## Slide 2 of 2



Base: New Canadians, n=193; Canadian-born, n=43.  
BM1. What is the most important thing for you when purchasing beauty products?



“

The products are different in  
Canada. There is a lot more

*variety*

---

of sun protection products  
for your skin.

Base: New Canadians, purchase beauty products, and exposed, n=193

Those whose beauty regime has changed, n=150.

BE2: In what ways has your beauty regime (routine) changed?

**Oath:**  
A Verizon company



“

Even though I have less time  
and money, I could try more  
new products in Canada  
because they are

**less expensive**

---

than in Brazil.

Base: New Canadians, purchase beauty products, and exposed, n=193

Those whose beauty regime has changed, n=150.

BE2: In what ways has your beauty regime (routine) changed?

**Oath:**  
A Verizon company

91%

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of respondents were very or somewhat satisfied with the selection of beauty products in Canada.



**Oath:**  
A Verizon company

Base: New Canadians, n=193; Canadian-born, n=43.  
BS2. How satisfied are you with the selection of beauty products available in Canada

# ADVERTISING FOR BEAUTY IS CRITICAL

## Top 4 Influencers when shopping for beauty products

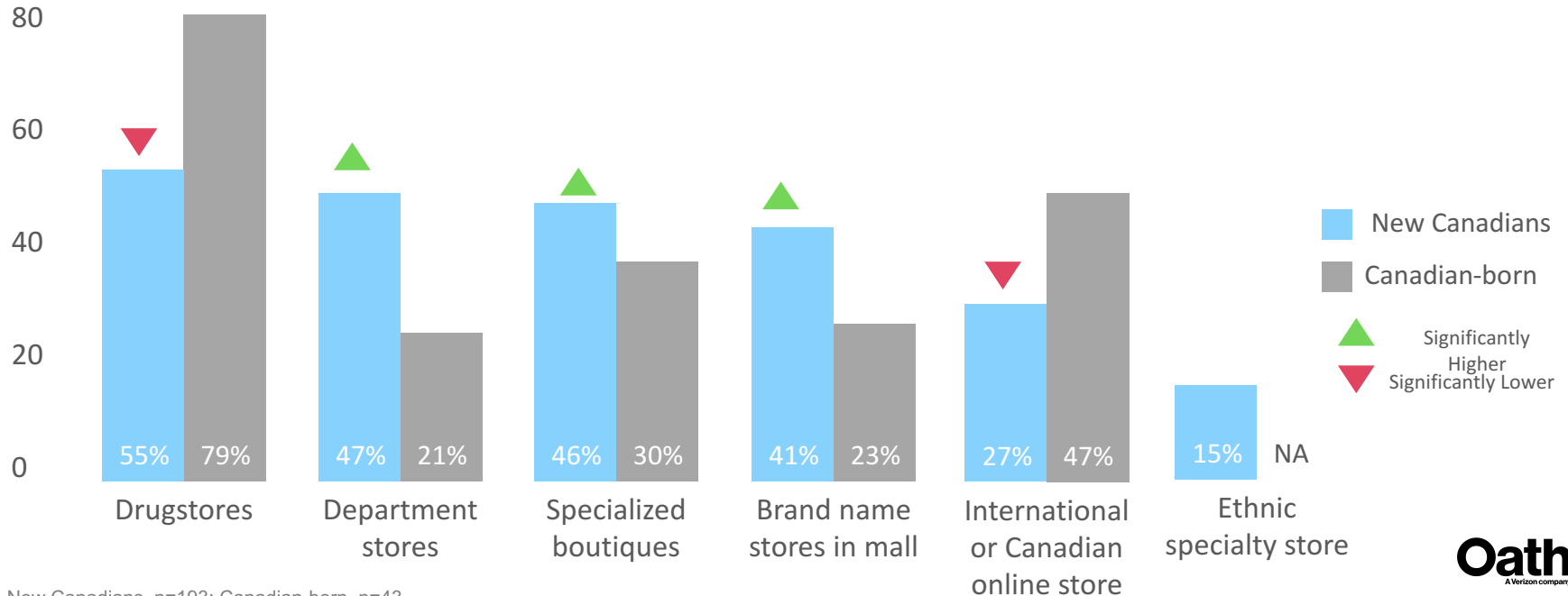


Base: New Canadians, n=193; Canadian-born, n=43

BA1. When shopping for beauty products, which sources of information are most likely to influence your decision to buy?

# STORE PREFERENCES DIFFER

Where do you buy beauty products?




Base: New Canadians, n=193; Canadian-born, n=43.  
BE3. Where do you buy beauty products?



5

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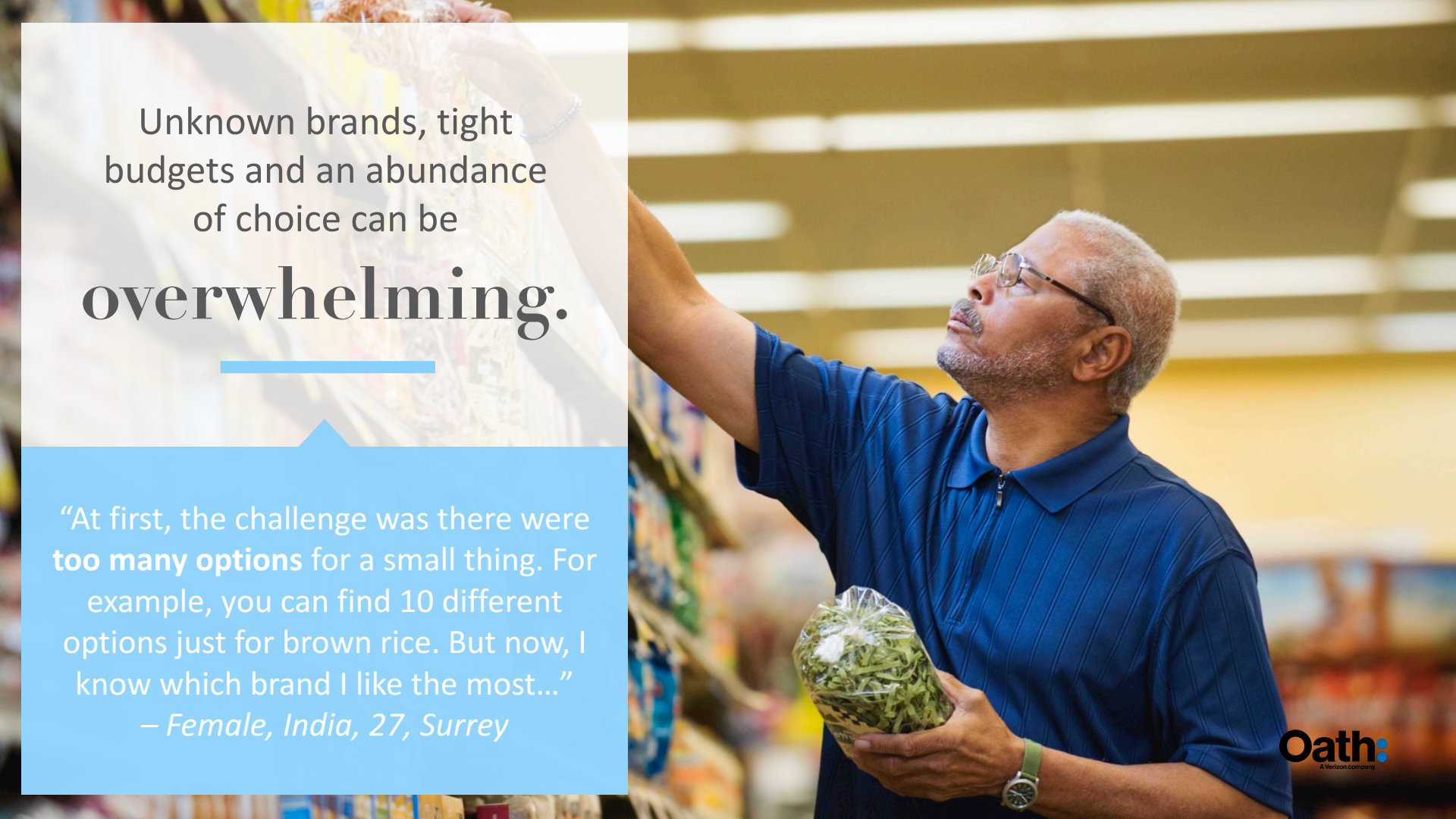
FOOD



Unknown brands, tight budgets and an abundance of choice can be **overwhelming.**

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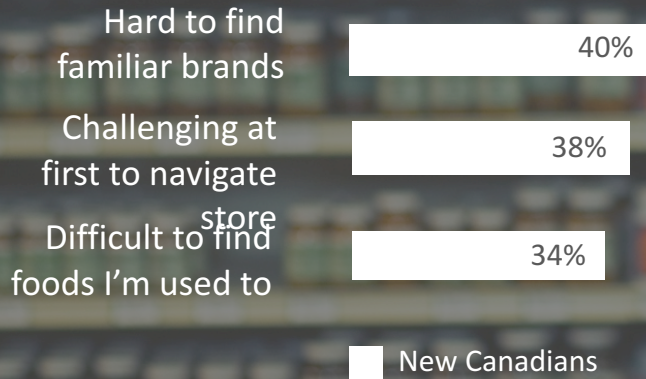


Unknown brands, tight budgets and an abundance of choice can be **overwhelming.**

“At first, the challenge was there were **too many options** for a small thing. For example, you can find 10 different options just for brown rice. But now, I know which brand I like the most...”  
— *Female, India, 27, Surrey*

# 86% of New Canadians are satisfied with selection of groceries in Canada

## But... Shopping Challenges Remain



Base: New Canadians, n=244

FS3. How satisfied are you with the selection of groceries in Canada?

FS1. What has been the biggest challenge in shopping for groceries in Canada?

# WHERE NEWCOMERS SHOP VARIES

## Top 2 Places Newcomers Shop for Different Grocery Products



### GRAINS

**59%** mainstream grocery stores  
**38%** wholesale stores



### FRUITS & VEGGIES

**61%** mainstream grocery stores  
**34%** large supermarkets selling food from country or origin



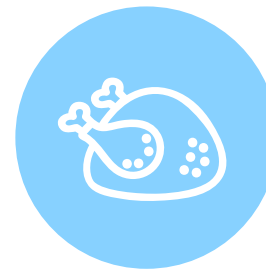
### SPECIAL INGREDIENTS

**48%** large supermarkets,  
**48%** visit smaller stores that sell food from country or origin  
**48%** visit ethnic grocery stores



### BAKED GOODS

**57%** mainstream grocery stores  
**36%** large supermarkets selling food from country or origin.



### MEAT

**53%** mainstream grocery stores  
**39%** large supermarkets selling food from country or origin

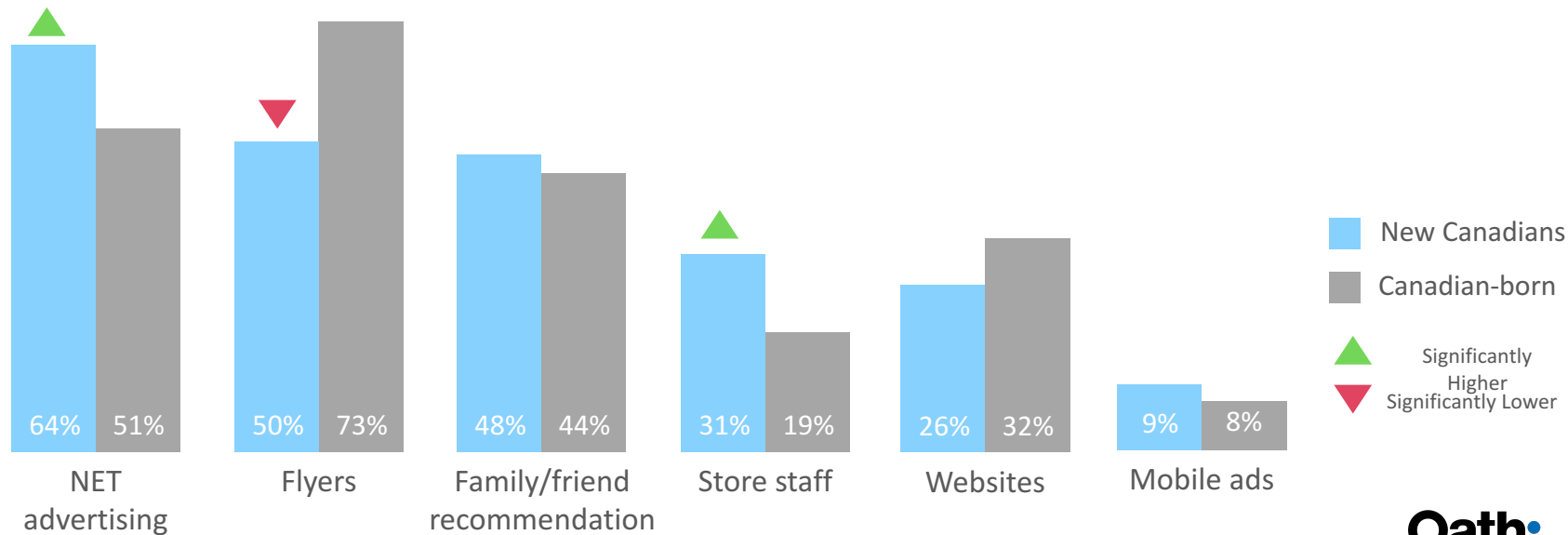
# PRICE IS PARAMOUNT

What's most important when choosing a main grocery store?



# ADVERTISING KEY FOR GROCERIES

What source of information most influential when choosing brands of food to buy?



Base: New Canadians, n=244; Canadian-born, n=59.

FA1. When shopping for groceries and food, which sources of information are most likely to influence your choice of what food brands to buy?

# 74%

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of New Canadians visit  
quick service  
restaurants **as often** or  
**more often** than in  
their country of origin



Restaurant dining is an opportunity to explore

## new tastes

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Although certain dietary restrictions require a bit more research



Restaurant dining is an opportunity to explore

## new tastes

---

Although certain dietary restrictions require a bit more research

“... For dining options, there aren't as many halal food options.”  
— Female, India, 53, Vancouver







6

TRAVEL

Travelling is not an initial priority  
for New Canadians. They want to

**settle in,**

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find a job and housing first.



Travelling is not an initial priority for New Canadians. They want to

**settle in,**

find a job and housing first.

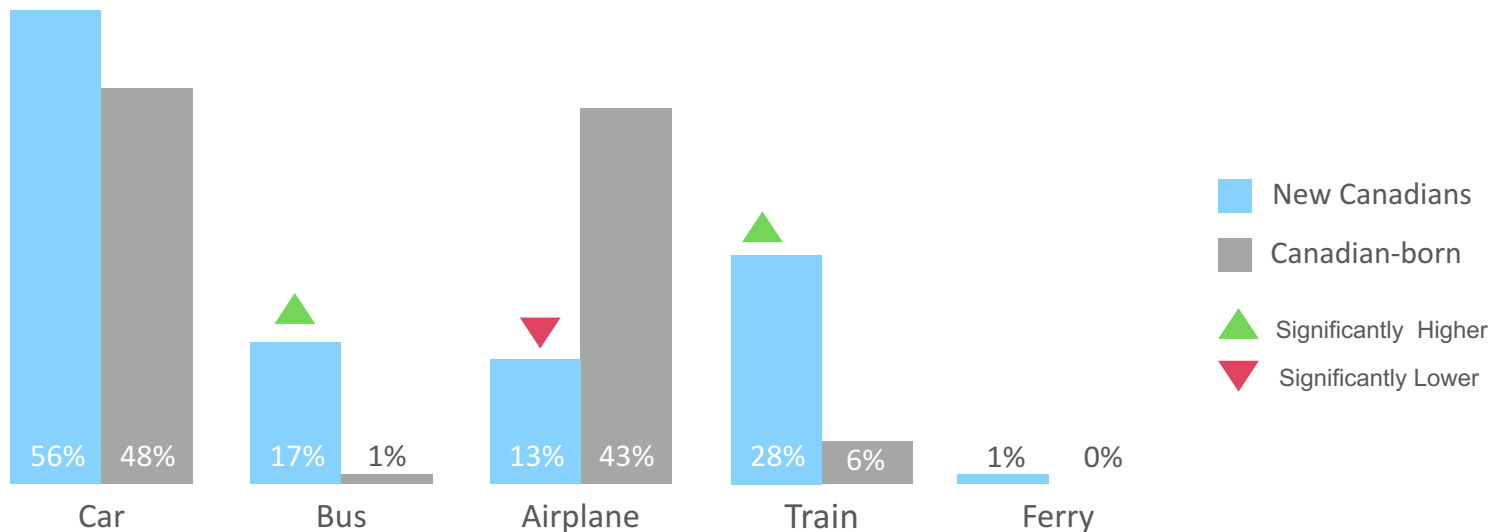
“We were **travelling less** for sure because my husband could only drive for 6 months on his international licence... Also, for USA we needed visa and I did not want to apply without any job...”

— *Female, India, 53, Vancouver*



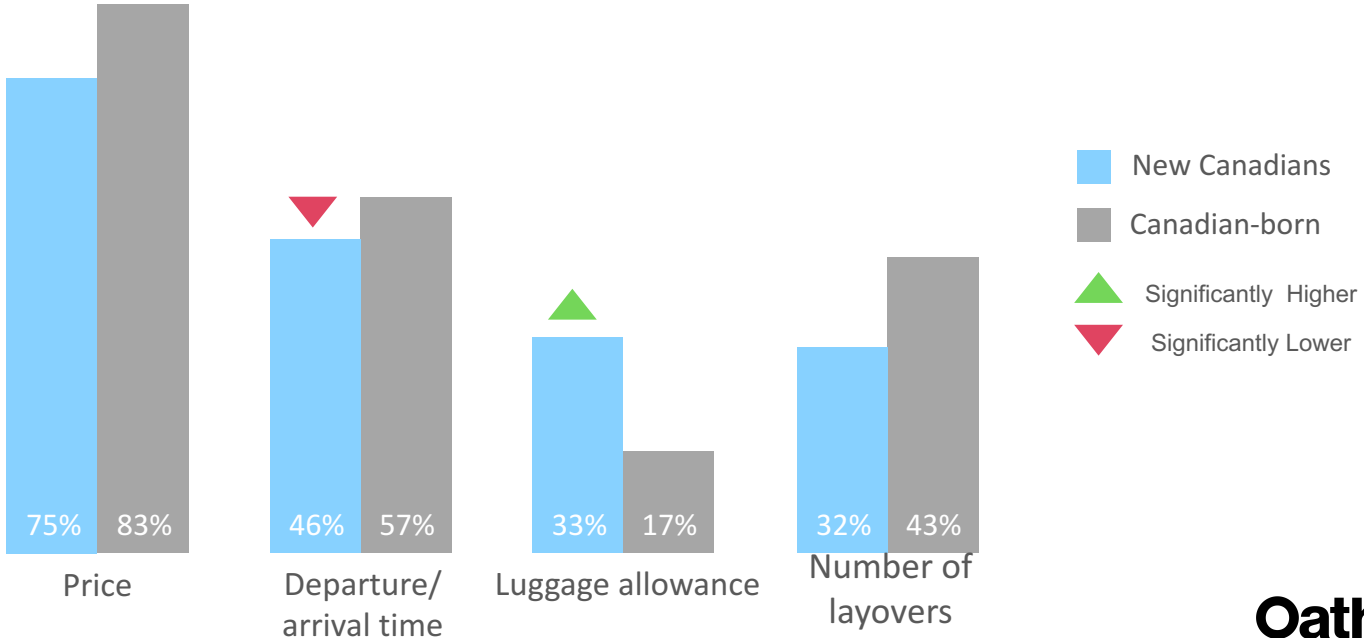
# BUS & TRAIN TRAVEL HIGHER FOR NEWCOMERS

Most often used mode of transportation when travelling



# PRICE #1 BUT LUGGAGE MATTERS FOR TRAVEL

Most important aspect when purchasing travel tickets

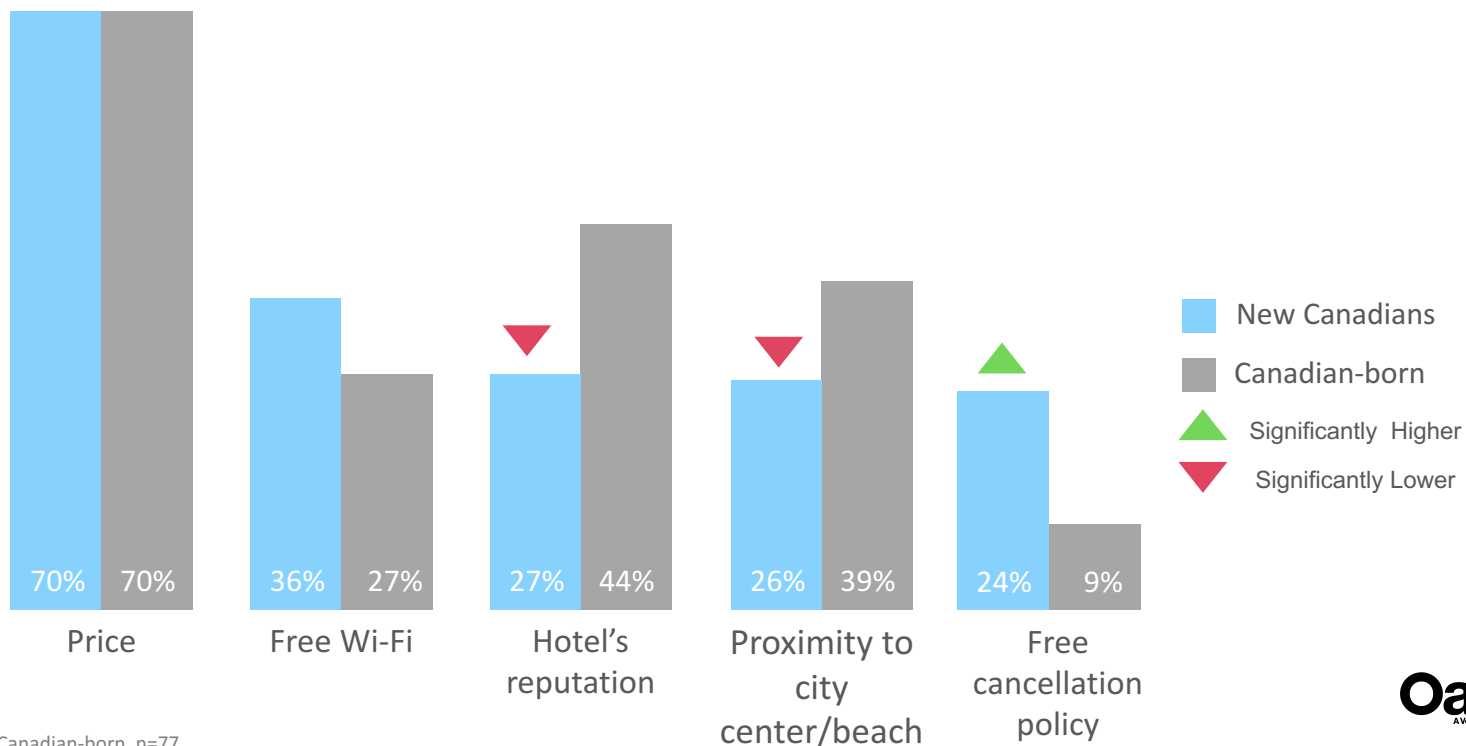


Base: New Canadians, n=256; Canadian-born, n=77.  
TM2. What is most important thing for you when purchasing flight/train/bus/ferry tickets?



# PRICE #1, FREE WIFI #2 FOR HOTEL

Most important aspects when booking hotel for trip

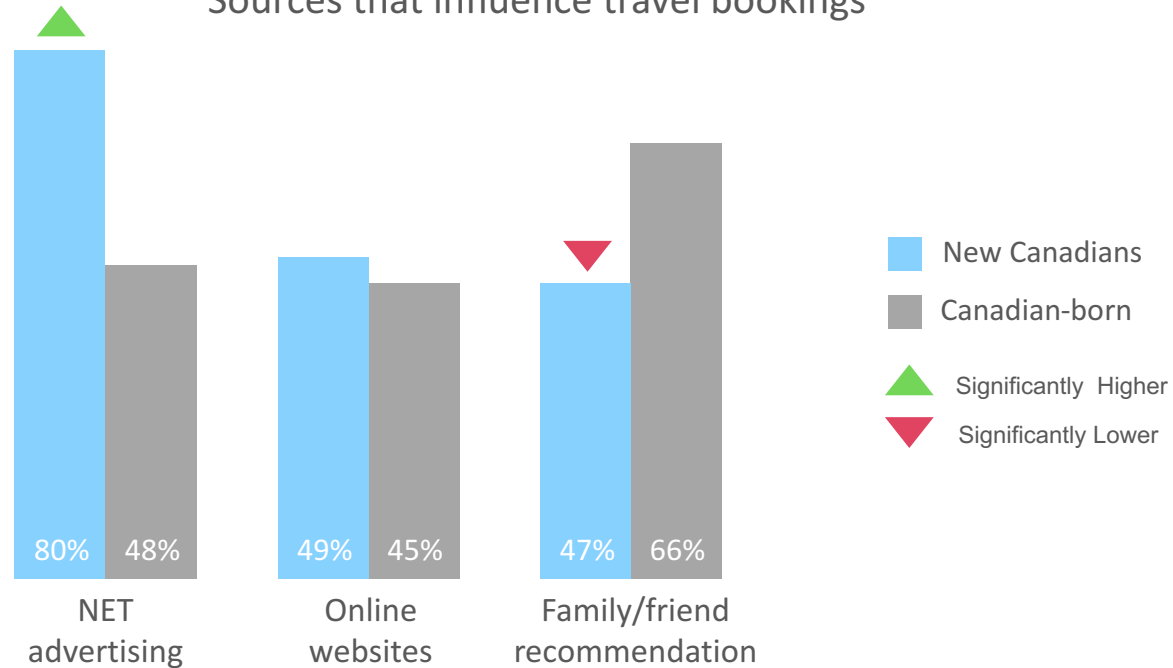


Base: New Canadians, n=256; Canadian-born, n=77.

TH1. What is most important thing for you when you book a hotel for your trip?

# ADVERTISING OF EXTRA IMPORTANCE FOR NEWCOMERS

Sources that influence travel bookings



# DIFFERENCES IN TRAVEL PLANNING SOURCES



## NEW CANADIANS

Top sources used:

1. Expedia (40%) ▼
2. Kayak (33%) ▲
3. Trip Advisor (25%)

## CANADA BORN

Top sources used:

1. Expedia (52%)
2. Trip Advisor (35%)
3. Airline Websites (25%)

▲ Significantly Higher ▼ Significantly Lower

Base: New Canadians, n=256; Canadian-born, n=77.

TH3. Which of the following sources, if any, do you usually use to plan your trip?





82%

are very/somewhat satisfied with the selection of *airlines* in Canada.

76%

are very/somewhat satisfied with the selection of *railway companies* in Canada.

80%

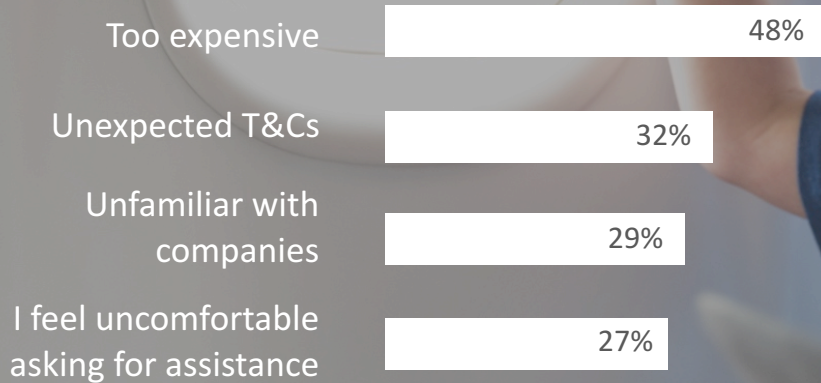
are very/somewhat satisfied with the selection of *bus companies* in Canada.

Base: New Canadians, n=256.

TS2. How satisfied are you with the selection of the following types of companies in Canada?

# Price and T&Cs are biggest shopping hurdles

## Challenges when purchasing travel tickets





7  
—  
AUTOS

# 91%

are very/somewhat satisfied with the selection of cars in Canada.

## Auto Shopping Experience is Generally Positive

Sales reps are friendlier/more eager to help

61%

More financing options available

56%

Sales reps are more knowledgeable

55%

*Buying/leasing a car in Canada vs. country of origin*

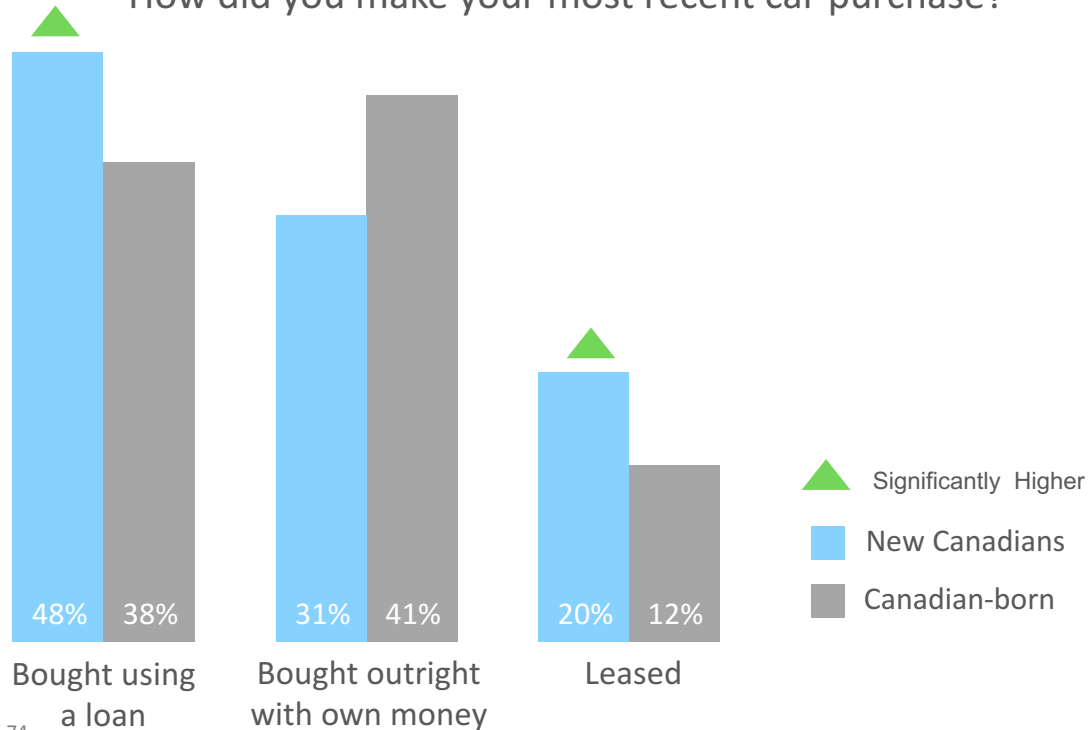
Base: New Canadians, n=259

CS1. How satisfied are you with the selection of cars in Canada compared to the selection in your country of origin?

CE4. Compared to buying/leasing a car in your country of origin, to what extent do you agree or disagree with the following statements about the car purchasing process in Canada?

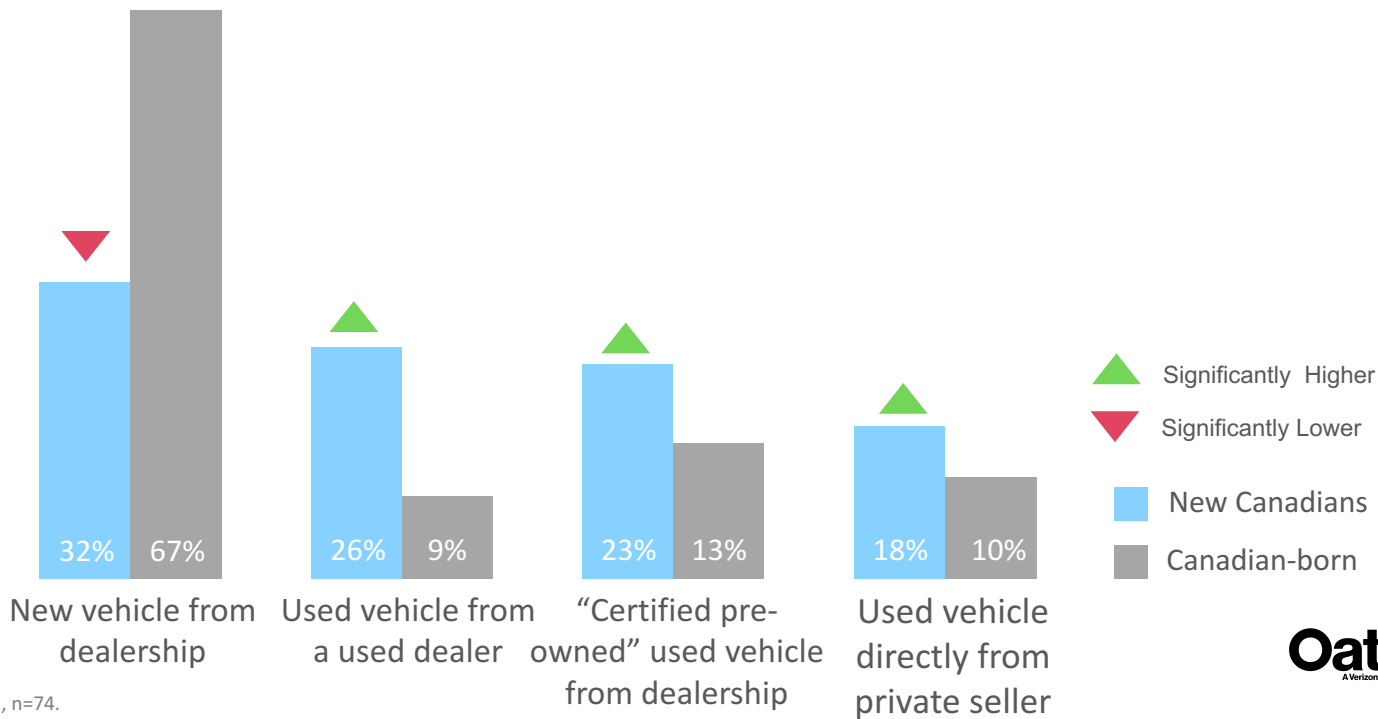
# NEW CANADIANS MORE LIKELY TO USE LOANS AND LEASE

How did you make your most recent car purchase?



# USED VEHICLES MORE POPULAR FOR NEW CANADIANS

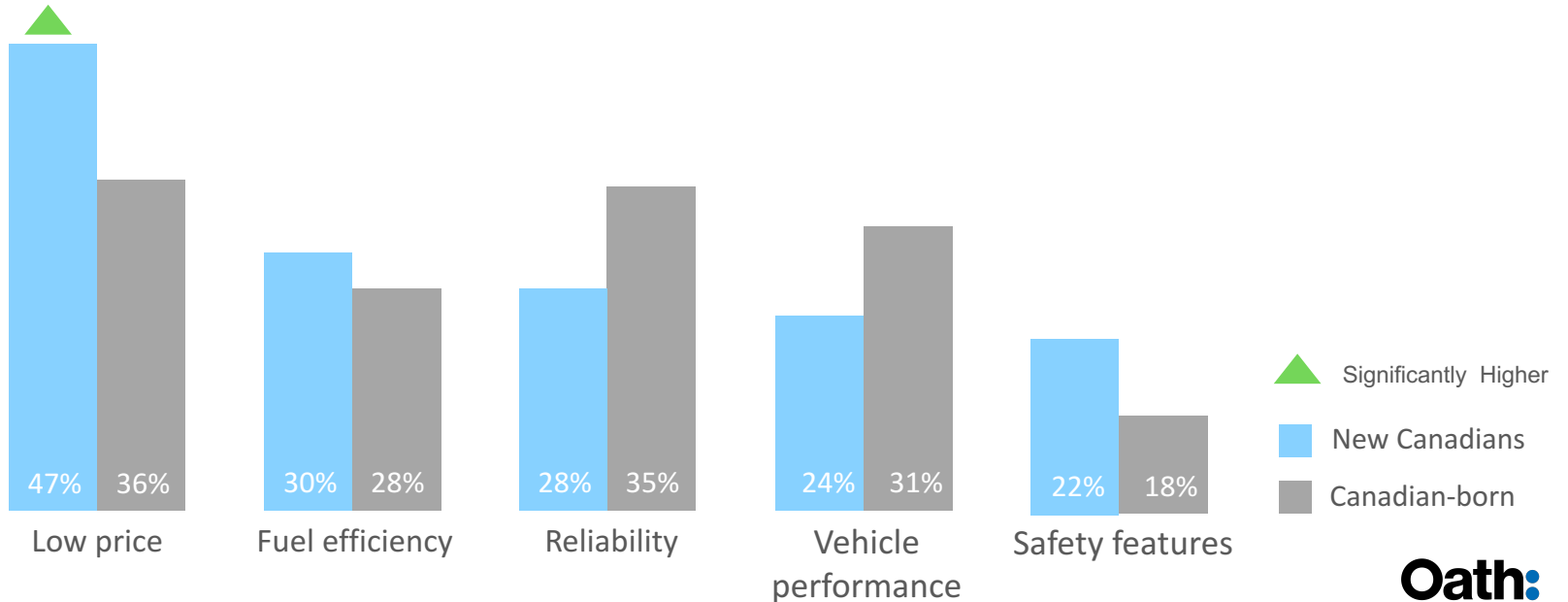
Where did you get your most recent vehicle?



Base: New Canadians, n=262. Canadian-born, n=74.  
CM3. Where did you buy/lease your most recent car?

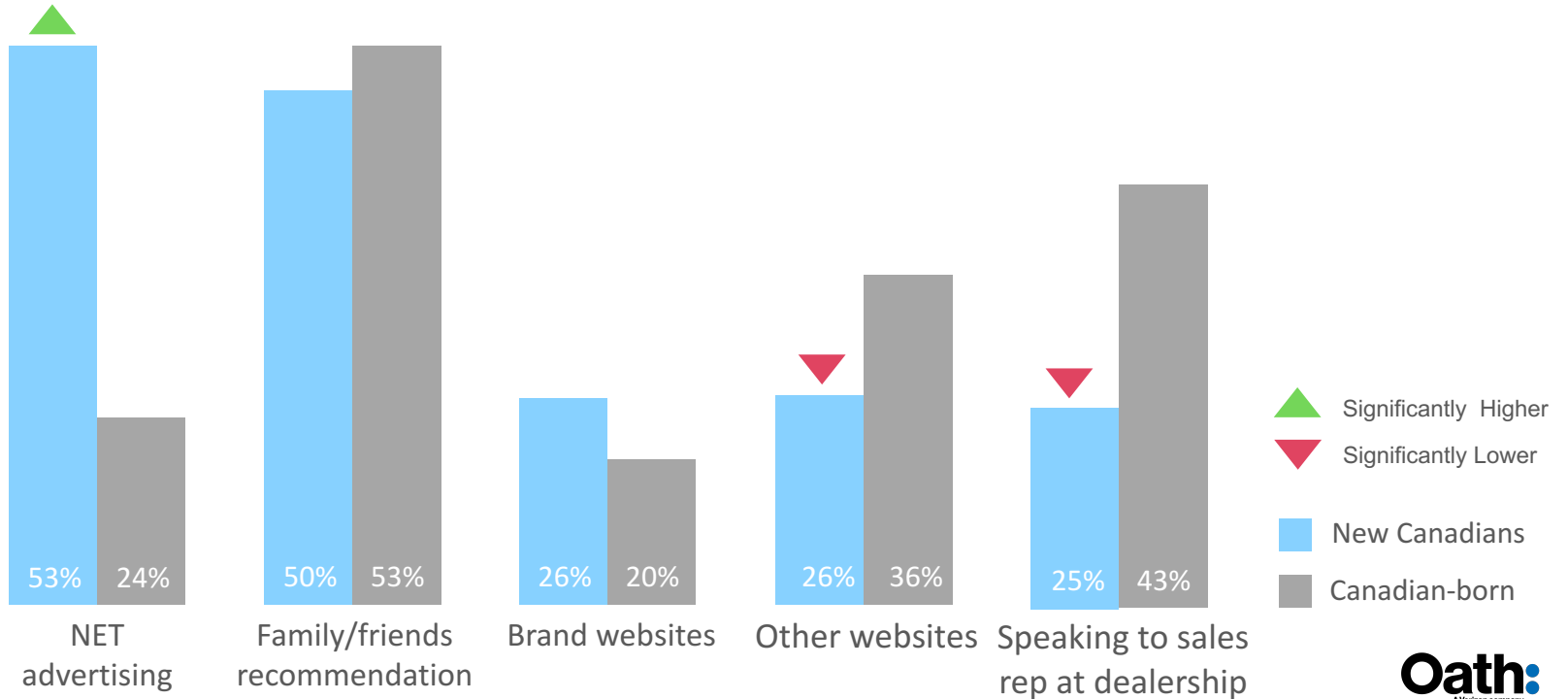
# PRICE RULES

## Factors influencing automotive purchase decisions



# ADVERTISING KEY TO MAKING DECISION

## Influential sources of information when auto shopping







8

BANKING

Most admit to  
researching banks  
from their  
**home  
countries**

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as there is a strong  
need to ensure the  
security of one's  
money.



A woman with long dark hair, wearing a light-colored short-sleeved top and a grey skirt, stands on the left side of the image, smiling and looking at her smartphone. She is positioned in front of an ATM. On the right side, a man in a light blue striped shirt and dark pants stands at another ATM, looking towards the machine. The background consists of dark grey panels and blue accents.

“

I was aware of Scotiabank  
before arriving. I search for

**all banks**

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in Canada on Google on my  
laptop.

— *Male, Lebanon, 31, Vancouver*



“

It was crucial for me to find an  
**internationally  
spread bank**

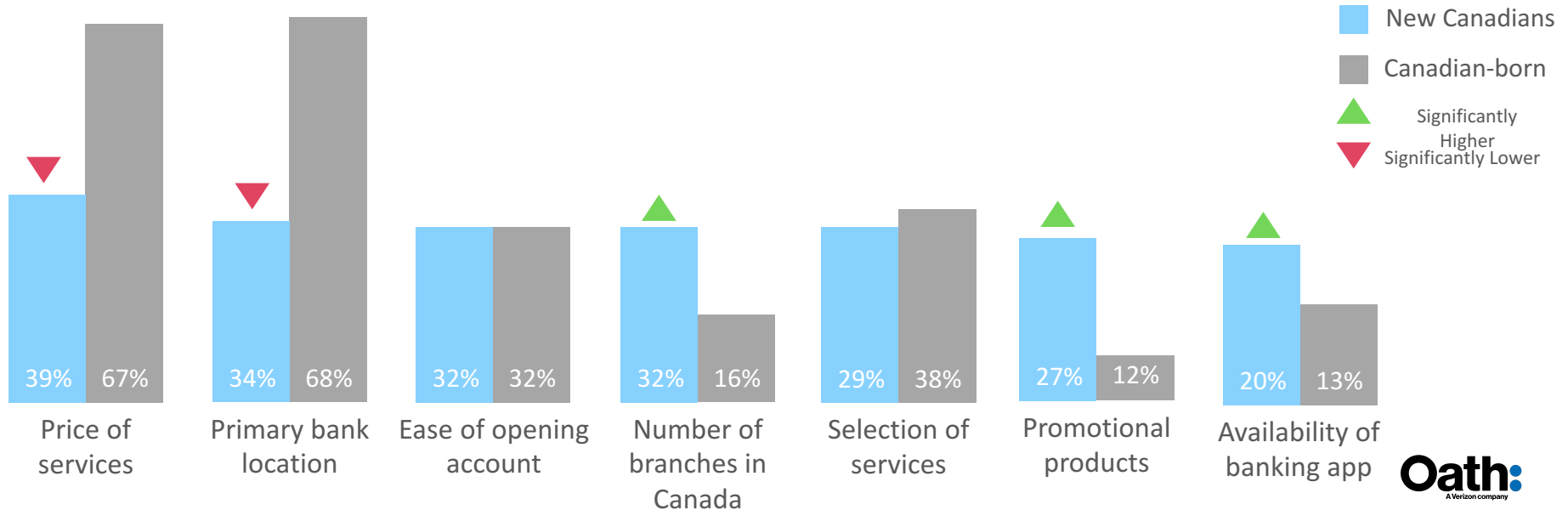
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with many branches in  
Montreal near [me], with low  
charges and convenient  
account opening procedures.

— *Male, Uganda, 32, Montreal*

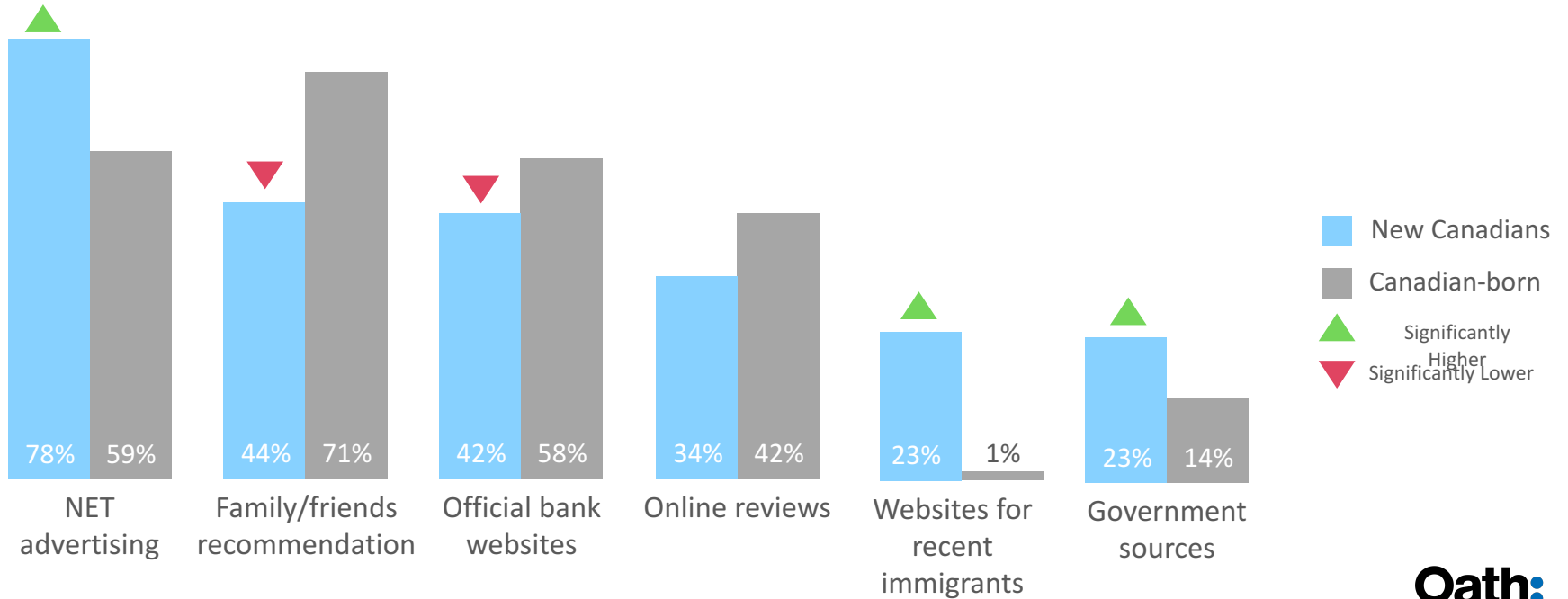
# CHOOSING A BANK

Opening a bank account is the first thing most New Canadians do upon arrival. They're more likely than Canadian-born bankers to choose banks with branches that are widely available.



# FINDING A BANK: SOURCE OF INFO

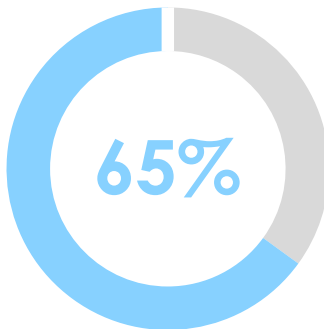
New Canadians turn to online resources (reviews, immigrant sites, government sources).



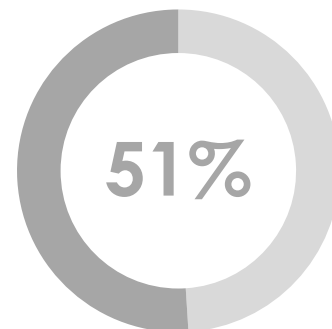


# BANKING APPS

New Canadians are more likely to have banking apps



of **new Canadians** have a Canadian banking app.



of **Canadian-born** have a Canadian banking app

# Top three challenges faced

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**53%** of new Canadians found bank fees too high in Canada. **50%** said they found it difficult to understand common financial products. **49%** weren't able to get financial products or services Canada due to lack of credit history.



**#1: Bank fees are too high in Canada**



**#2 : Can't understand financial products**



**#3 : Lack of credit history in Canada**



A woman with long dark hair, wearing a light-colored short-sleeved top and a grey skirt, stands on the left side of the image, smiling and looking at her smartphone. She is positioned in front of an ATM. On the right side, a man in a light blue striped shirt and dark pants stands at another ATM, looking towards the machine. The background is a dark blue wall with a lighter blue horizontal band.

“

If I could open the account  
**online**

---

that would have been very  
convenient for me. The most  
important thing would be the  
ease of the process.

— *Male, Uganda 32, Montreal*

A woman with long dark hair, wearing a light-colored short-sleeved top and a grey skirt, stands on the left side of the image, smiling and looking at her smartphone. She is positioned in front of an ATM. On the right side, a man in a light blue striped shirt and dark pants stands at another ATM, looking at a card or document he is holding. The background is a dark blue wall with a lighter blue horizontal band.

“

I would definitely meet  
someone like a  
**financial  
advisor.**

---

The most important thing when  
purchasing banking services  
online would be to have a  
video/live chat with an advisor.

— *Female, Philippines, 26, Saint-Hubert*

Since bank fees are perceived as high and budgets are low, **incentive programs**

---

are something that new Canadians would appreciate.





“

The area where brands are  
lacking is giving

**incentives to  
newcomers**

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in order to retain customers.  
Eg: TD doesn't offer discount  
on banking fees to newcomers  
whereas RBC and Scotiabank do.

— *Female, Pakistan, 32, Toronto*



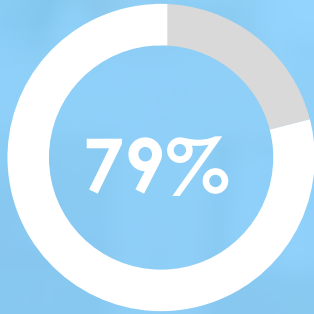
9

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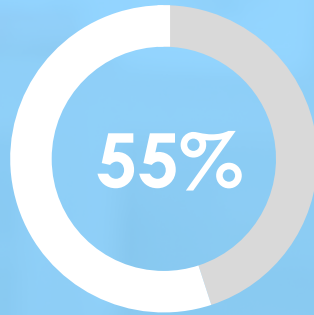
TELCOM

# APPS TO KEEP CONNECTED

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Have smartphone with  
data plan



Use **messenger apps** to  
stay in touch with friends  
& family outside of Canada



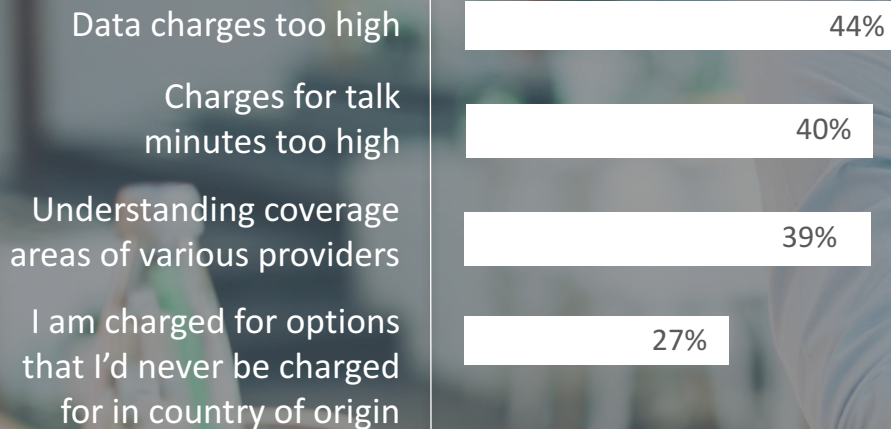
Base: New Canadians, n=342;

TEL1. Which of the following devices do you own?

TEL4. How well does the following describe you?

# 75%

are very/somewhat satisfied with the selection of telecom services in Canada, however...



*Challenges when buying a phone or phone plan*

Base: New Canadians, n=342;

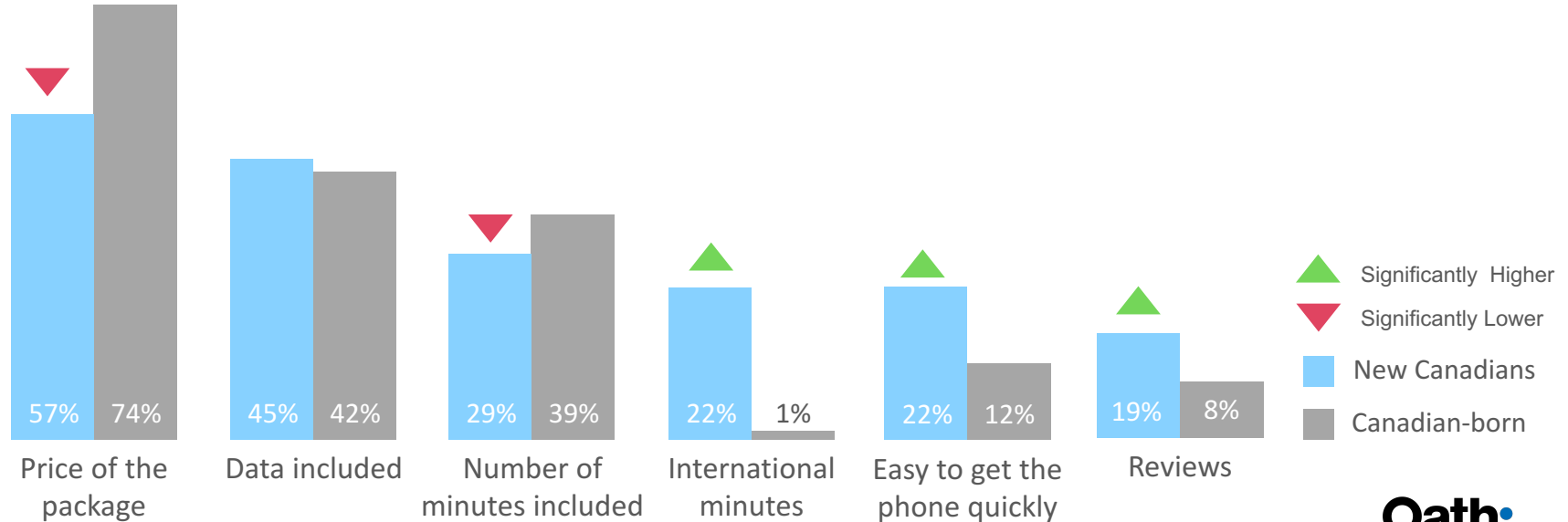
How satisfied are you with the selection of mobile telecommunication services in Canada?

What were the biggest challenges you had in shopping for a cell phone service provider/plan in Canada? Please list the top 3:

**Oath:**  
A Verizon company

# INTERNATIONAL MINUTES STAND OUT

What factors are important when shopping for cell phone service provider?

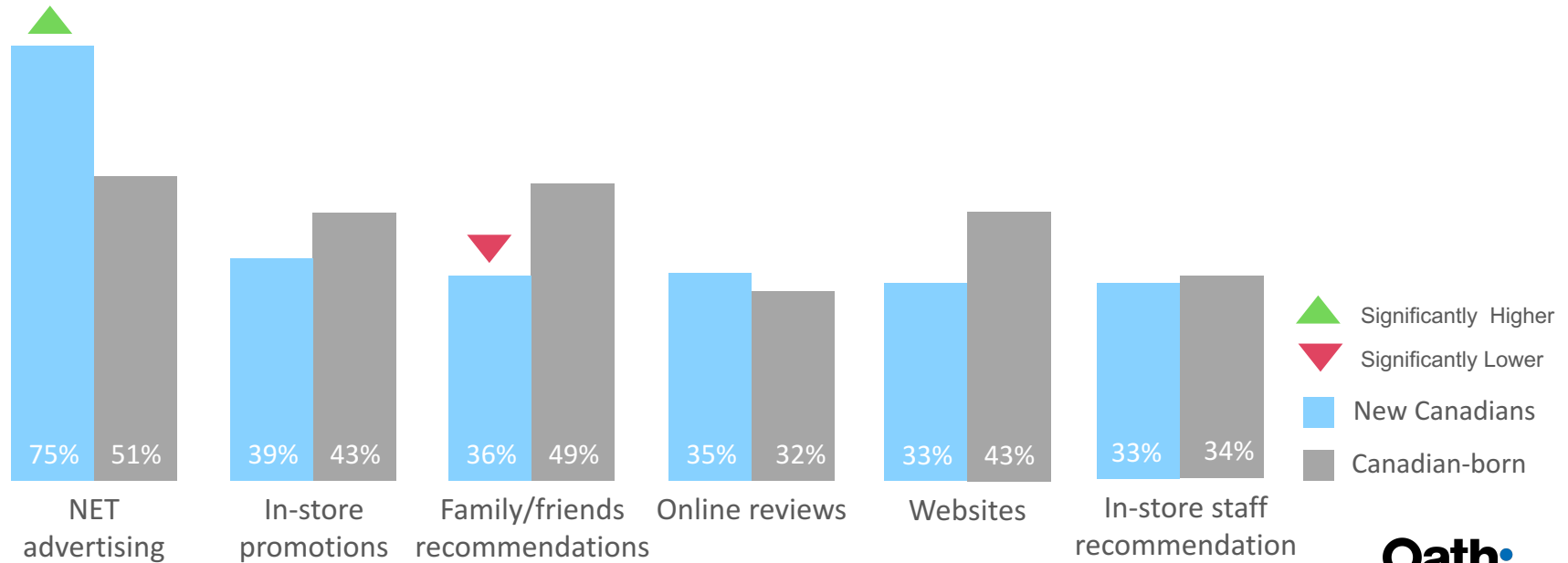




# BUYING A CELL PHONE



Sources of info: New Canadians receptive to advertising to help them choose cell phones and plans



Base: New Canadians, n=344; Canadian-born, n=74.

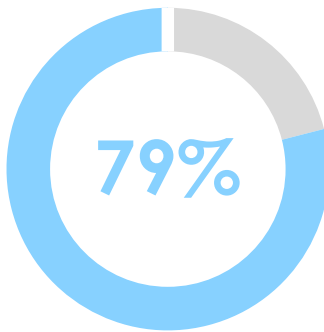
TE1. Which sources of information did you use when you were shopping for a cell phone service provider/plan?



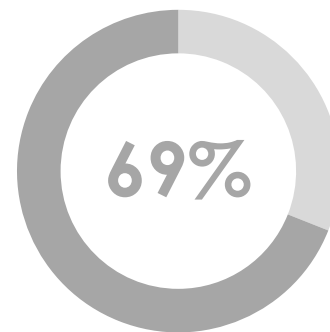
# DATA PLANS ARE KEY

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Smartphone with a data plan is more important for New Canadians because they need data in order to use their messaging apps.



of **new Canadians** own a smartphone with a **data plan**.



Of **Canadians** own a smartphone with a **data plan**.



10



RECOMMENDATIONS

# COMPARING 2014 - 2017

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2014	2017
Accessible Media	True
Smartphone dominant	True
Brand education	True
Price sensitive	True
Balance of adoption and maintaining country of origin practices	True, but shift to adoption
Language preferences lean to English	True, but certain content best in native language
Heavy users of Google, Yahoo and YouTube	True, but only Yahoo and LinkedIn usage higher than Canadian-born



# 3 TAKEAWAYS:

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## LANGUAGE & VALUES

New Canadians balance adopting Canadian lifestyle and retaining culture from homeland



## POWER OF ADS

New Canadians look to media and brands to help them settle in



## MOBILE & FREE CONTENT

New Canadians are heavy smartphone users & are regular consumers of free digital video content



**QUESTIONS:** Shannon Austin  
kelleys@oath.com

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**GRAPHICS:** Erica Rae Chong  
ericaraechong@gmail.com