

*THE BENSIMON BYRNE*

# Consumerology Report

**New Canadians,  
New Consumers**

February 2009



# Methodology

- The Gandalf Group conducted qualitative and quantitative research to produce the Consumerology Report.
- Online discussions were held between December 26 and December 29, 2008.
- A national proportionate quantitative online survey was conducted with 1,637 Canadians
  - The sample included 377 First generation Canadians and 515 Second generation Canadians
- Statscan Census data puts first generations at 20% of the population, second generation at 15% of the population, and third generation plus at 65% of the population.
- The survey was conducted in English and French and fielded Jan 20-27<sup>th</sup>.
- The Consumerology Report yields a margin of error of  $\pm 2.42\%$  19 times out of 20.

# Methodology

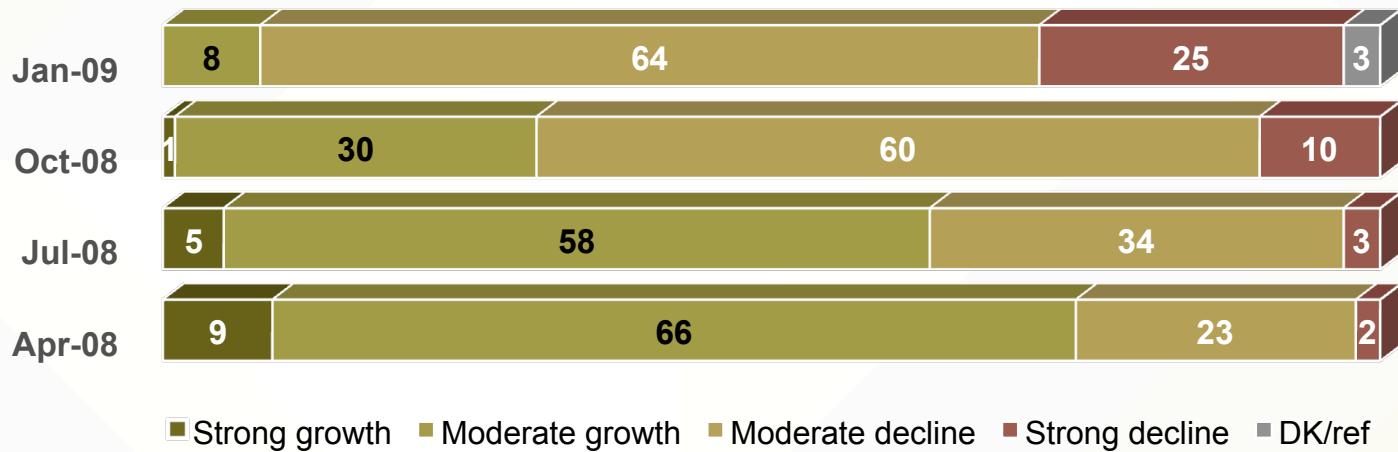
- Each quarter the Consumerology Report tracks consumer opinions about the economy, their personal financial expectations, consumer buying intention, and attitudes toward key national issues.
- The primary purpose of this edition of Consumerology is to explore how consumers differ in behaviour and opinion depending on the length of time they or their family has spent in Canada. Indeed new Canadians are new consumers.

# Assessments of the National Economy

- Consumer assessments have continued to plummet since last quarter. There is virtual unanimity that the country is now in a recession.
  - 9 in 10 people believe that the economy is in a decline, including a quarter of the population who think that it is experiencing a strong decline.
- Canadians are more positive on short term prospects than most commentators. In fact, optimism has increased over the past quarter. More than half of consumers believe that in a year from now, the economy will be stronger than it is today.
  - Optimism for the coming year is strongest among new Canadians, older Canadians and those living in Eastern and Western Canada.
  - On the other hand, most Quebec residents believe that in a year from now, the economy will be weaker than it is today.

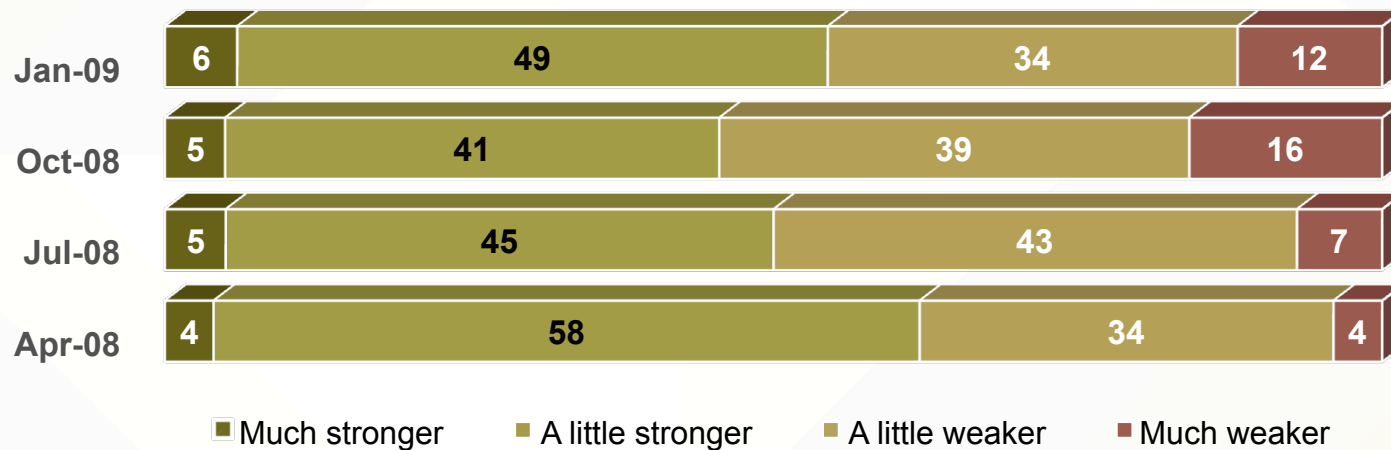
# Assessments of the National Economy

- In general, how would you describe the state of the economy of Canada today – would you say that it is in a period of strong growth, moderate growth, moderate decline, or strong decline?



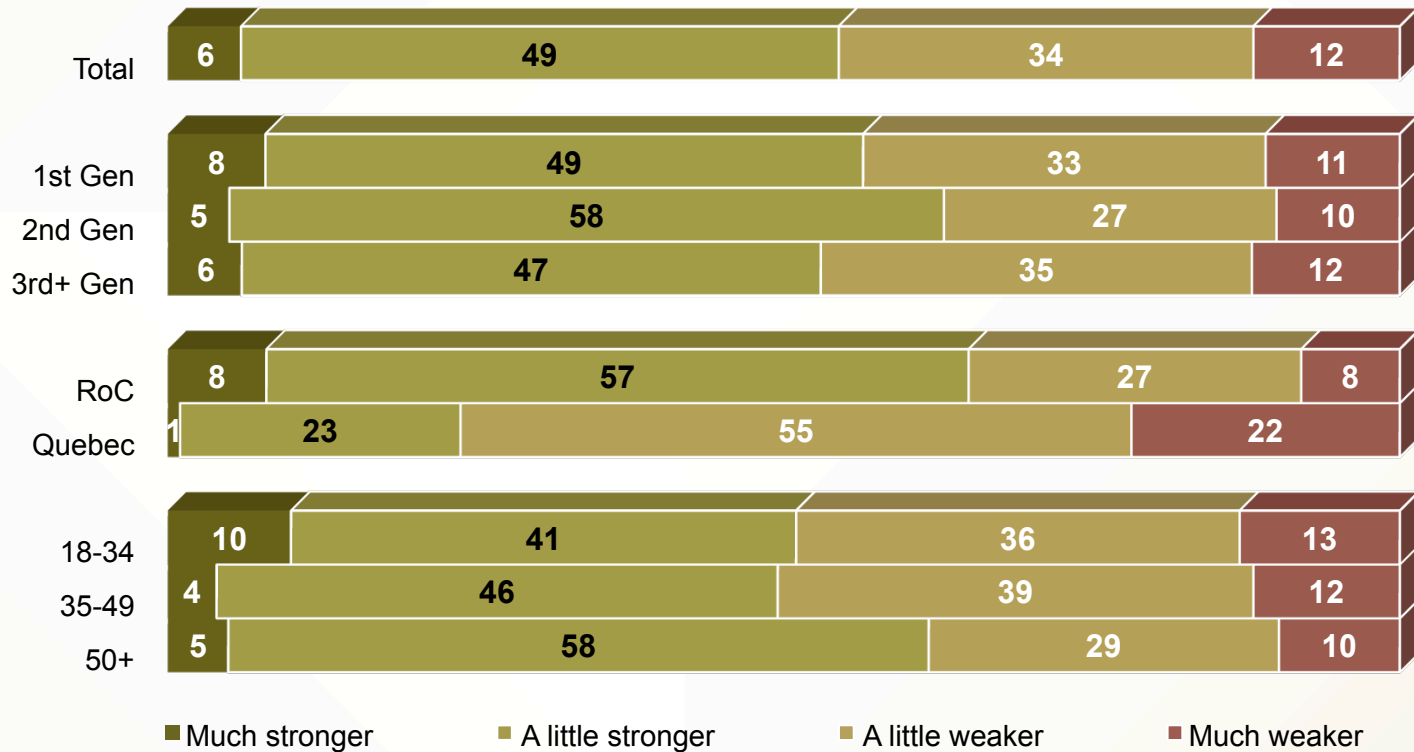
# Economic Expectations

- Looking forward to one year from now, do you think the economy will be much stronger than it is today, a little stronger than it is today, a little weaker than it is today or much weaker than it is today?



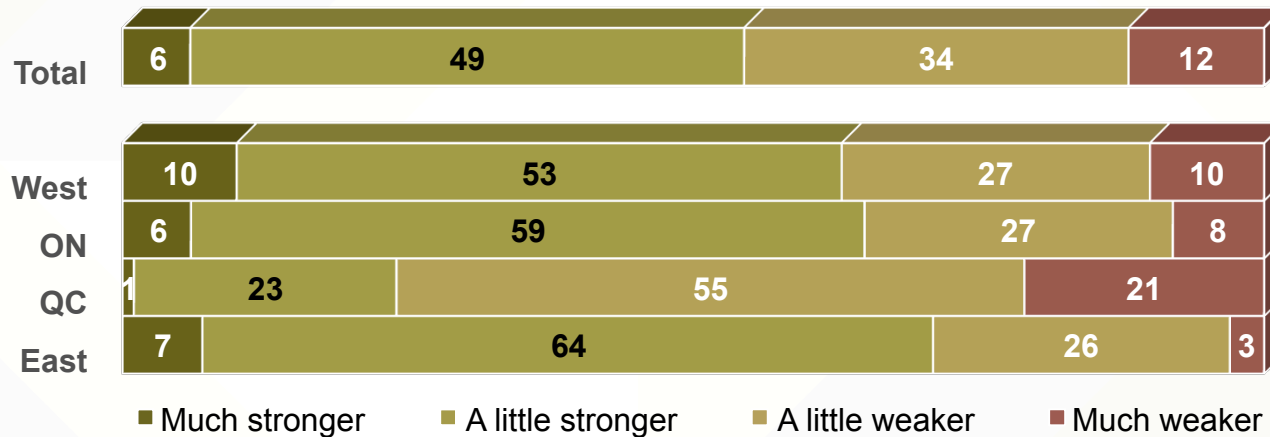
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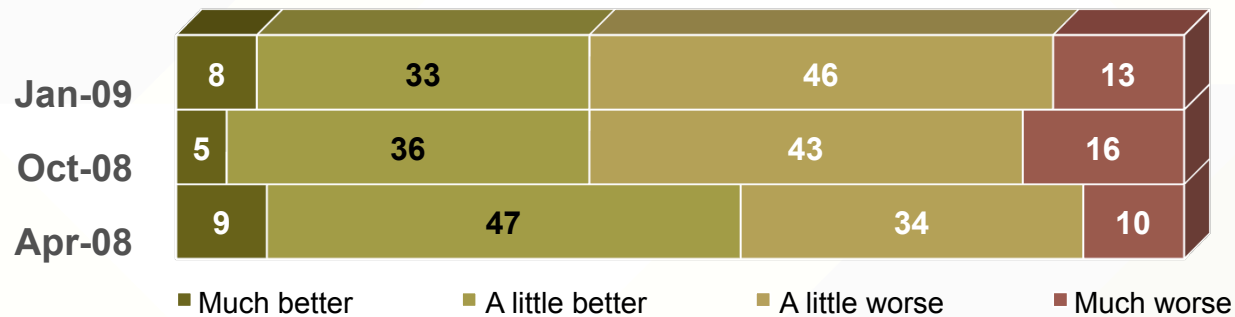


# Assessment of Personal Finances

- Personal financial assessments have remained stable since last quarter – most consumers maintain that they are worse off this year than they were last year.
- In keeping with their optimism about the national economy, about three quarters of Canadians believe that in a year from now their financial situation will be in better shape than it is currently.
- Immigrants, particularly 1<sup>st</sup> generation, are faring worse than others and do not expect to fare as well in the coming year.

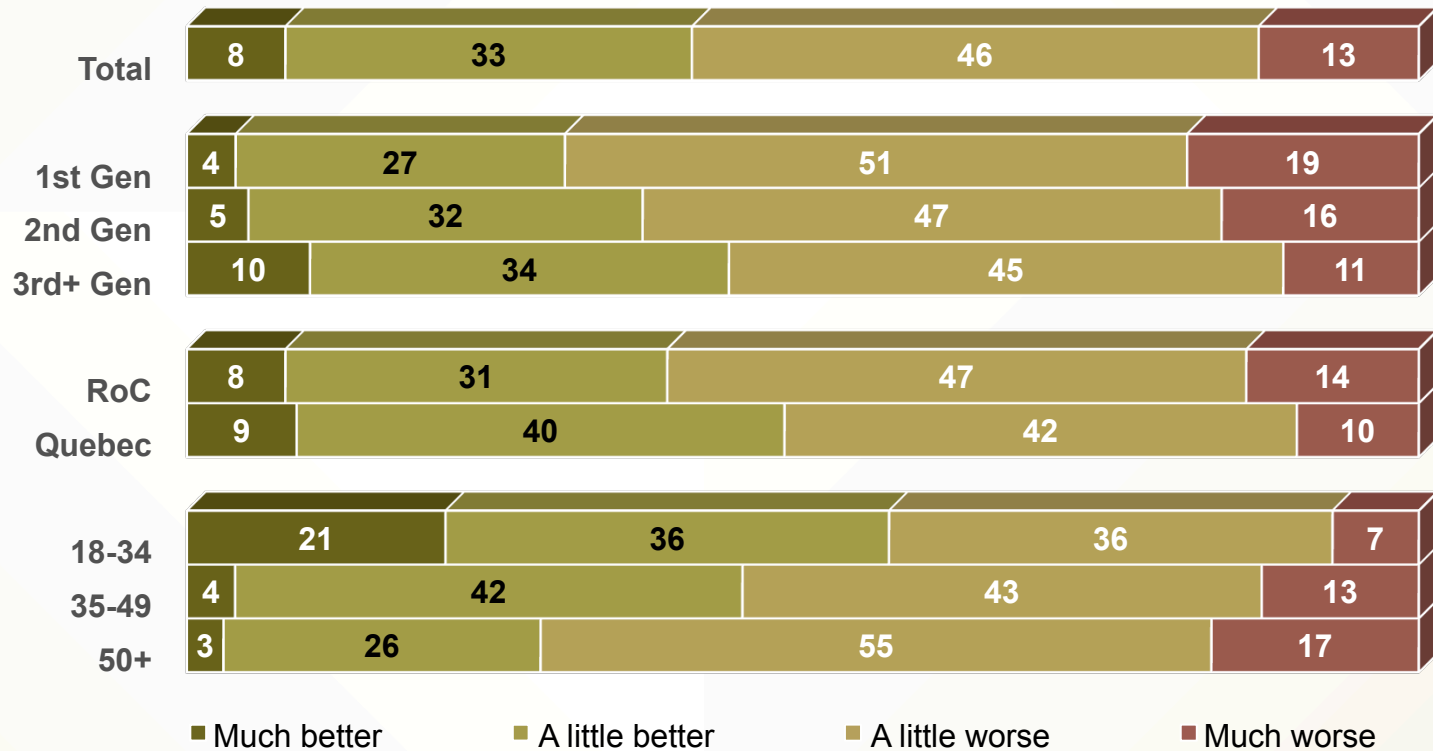
# Assessment of Personal Financial Situation

- How would you say your *personal* financial or economic situation is compared to one year ago? Would you say your personal or economic financial situation has gotten much better, a little better, a little worse or much worse?



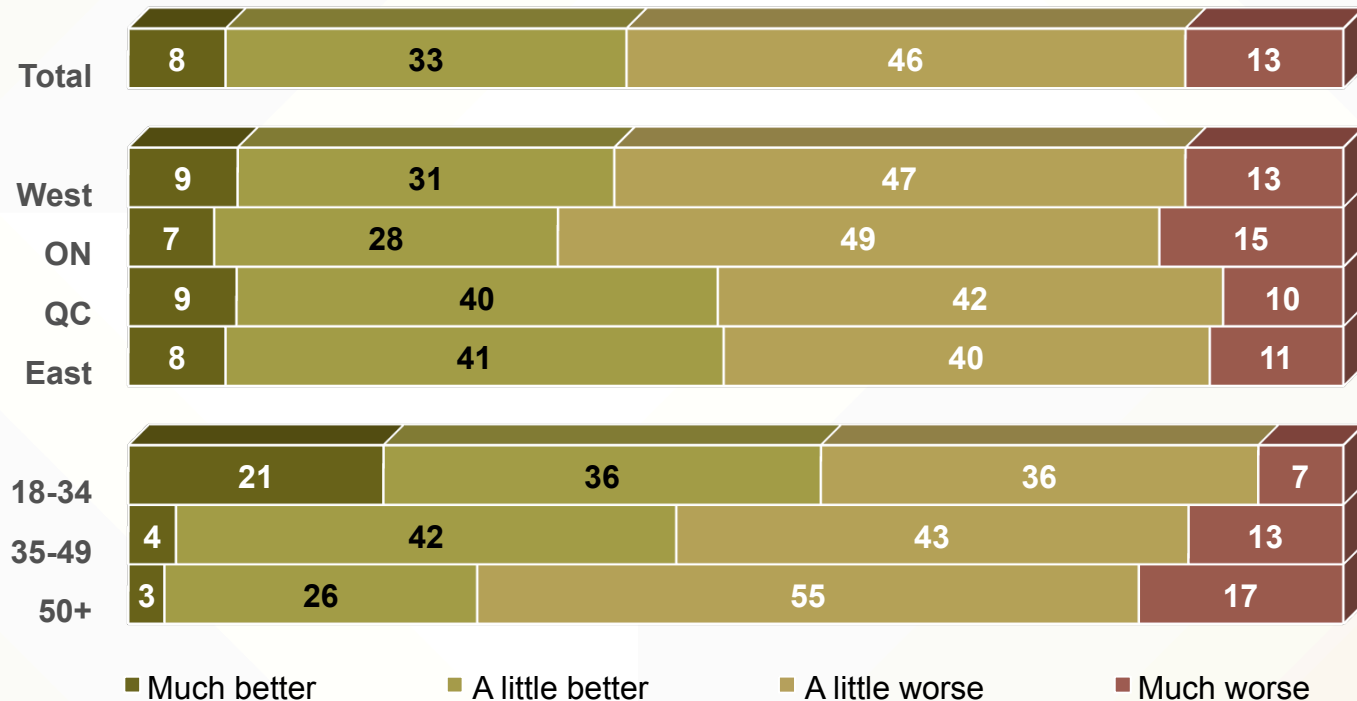
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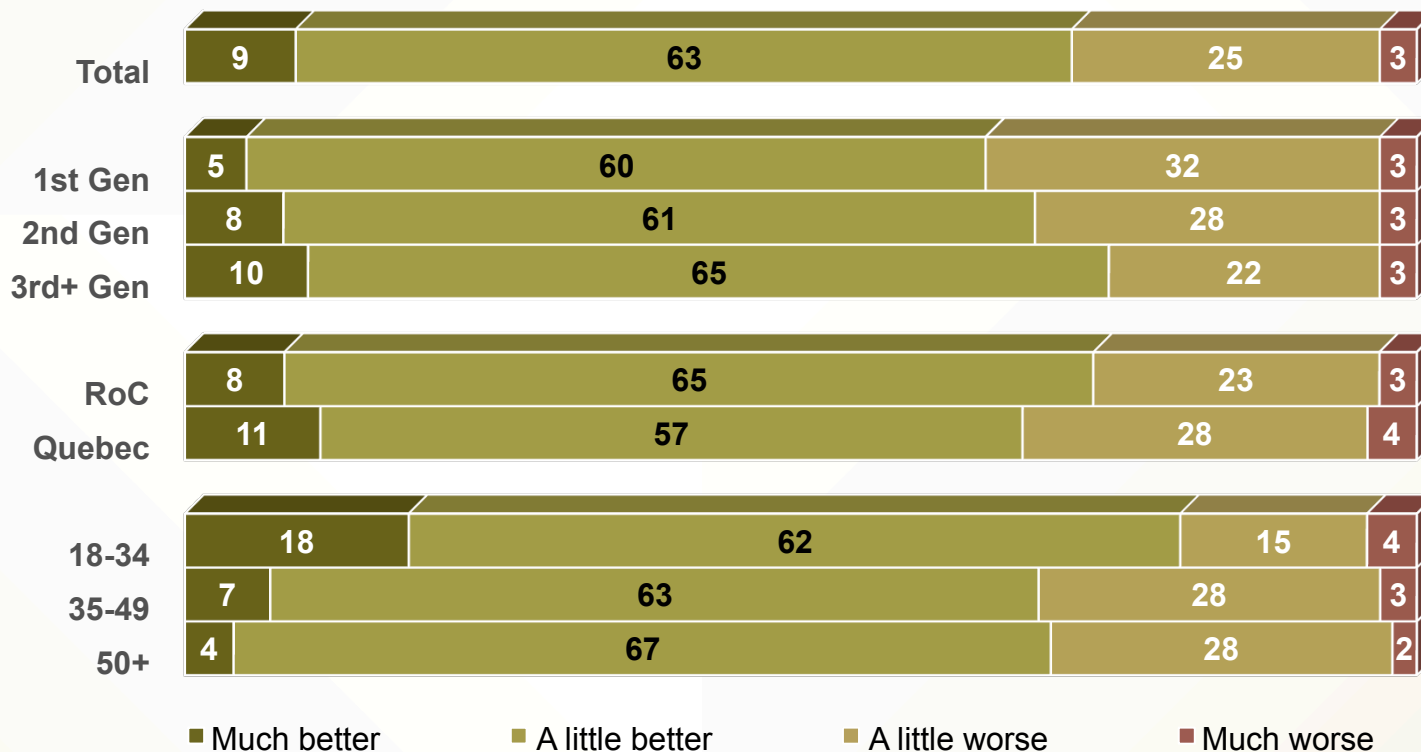
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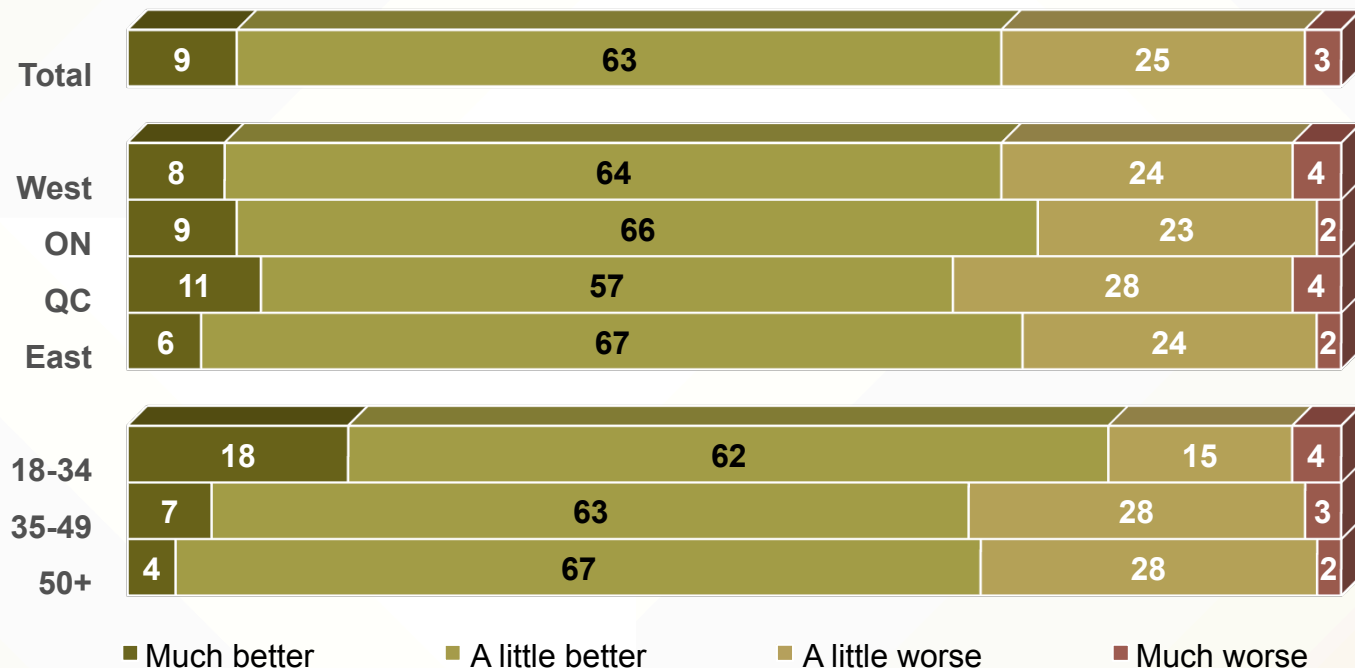
# Projection of Personal Financial Situation

- How do you expect your *personal* financial or economic situation to be one year from now – compared to what it is like today. Do you expect that your personal or economic financial situation will be in much better shape, a little better shape, a little worse, or much worse than it is now?



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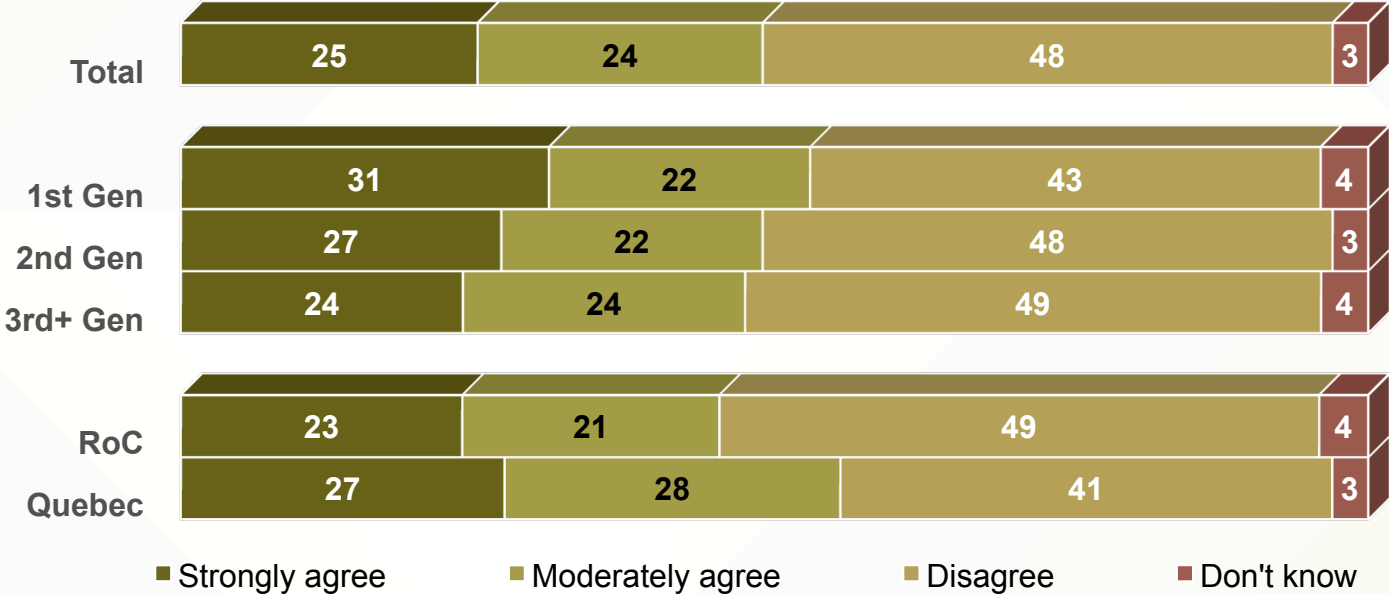


# Job Security

- Less than half of Canadians feel secure about their family's employment situation.
- Newer Canadians express a higher concern about the security of their own or their family members' jobs.
- Quebec residents' concern for the economy is revealed through their job security concern as well.

# Job Security

- Agree/Disagree: I am worried that I or somebody in my household might lose their job this year



# Impressions of Canada

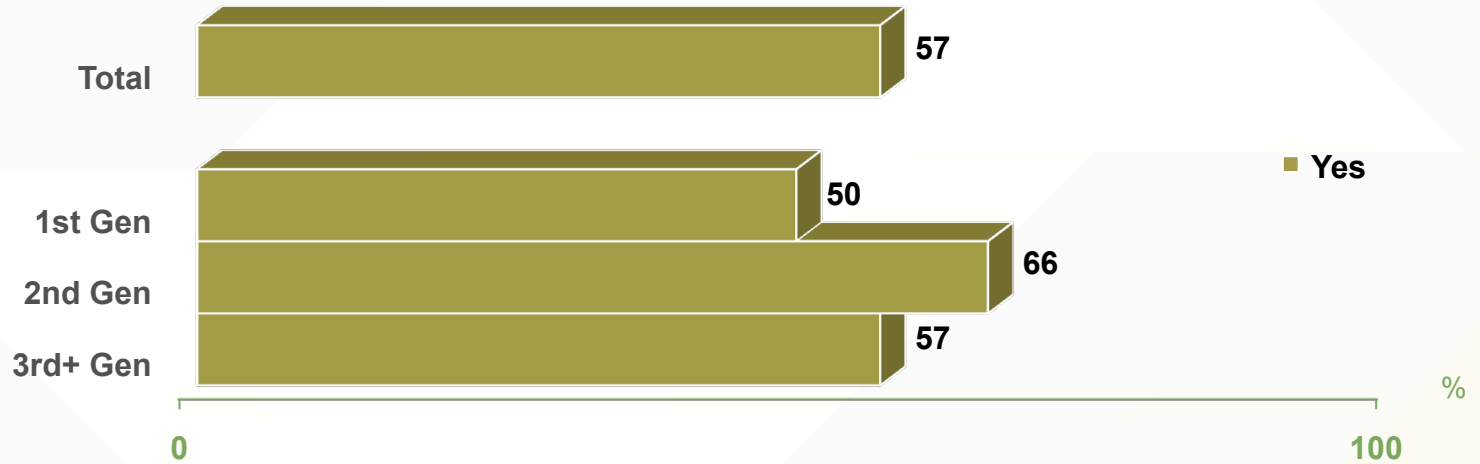
- 1<sup>st</sup> generation immigrants are less likely than 2<sup>nd</sup> or higher generations to think of Canada as the best place to live - one in 10 thinks the United States is a better place to live.
- New Canadians are somewhat less appreciative of the physical attributes of Canada, but are equally if not more appreciative of the social and economic attributes of Canada.
- In the heart of the Canadian winter, only 1/3 of Canadians strongly value the winter experience.
  - Quebec residents like winter more than others.
  - 1<sup>st</sup> generation immigrants are more likely than others to say that they do not value Canadian winters at all.

# Impressions of Canada

- New Canadians are above the national average in terms of valuing our system of government and protecting minority rights.
  - Real schism here is French/English.
- New Canadians in Quebec support bilingualism, but new Canadians in the rest of Canada show a similar disinterest in it that 3<sup>rd</sup> plus generation plus do in RoC.
- New Canadians value public healthcare, public primary and secondary education, job opportunity, and standard of living as much as 2<sup>nd</sup> or 3<sup>rd</sup> plus generations.

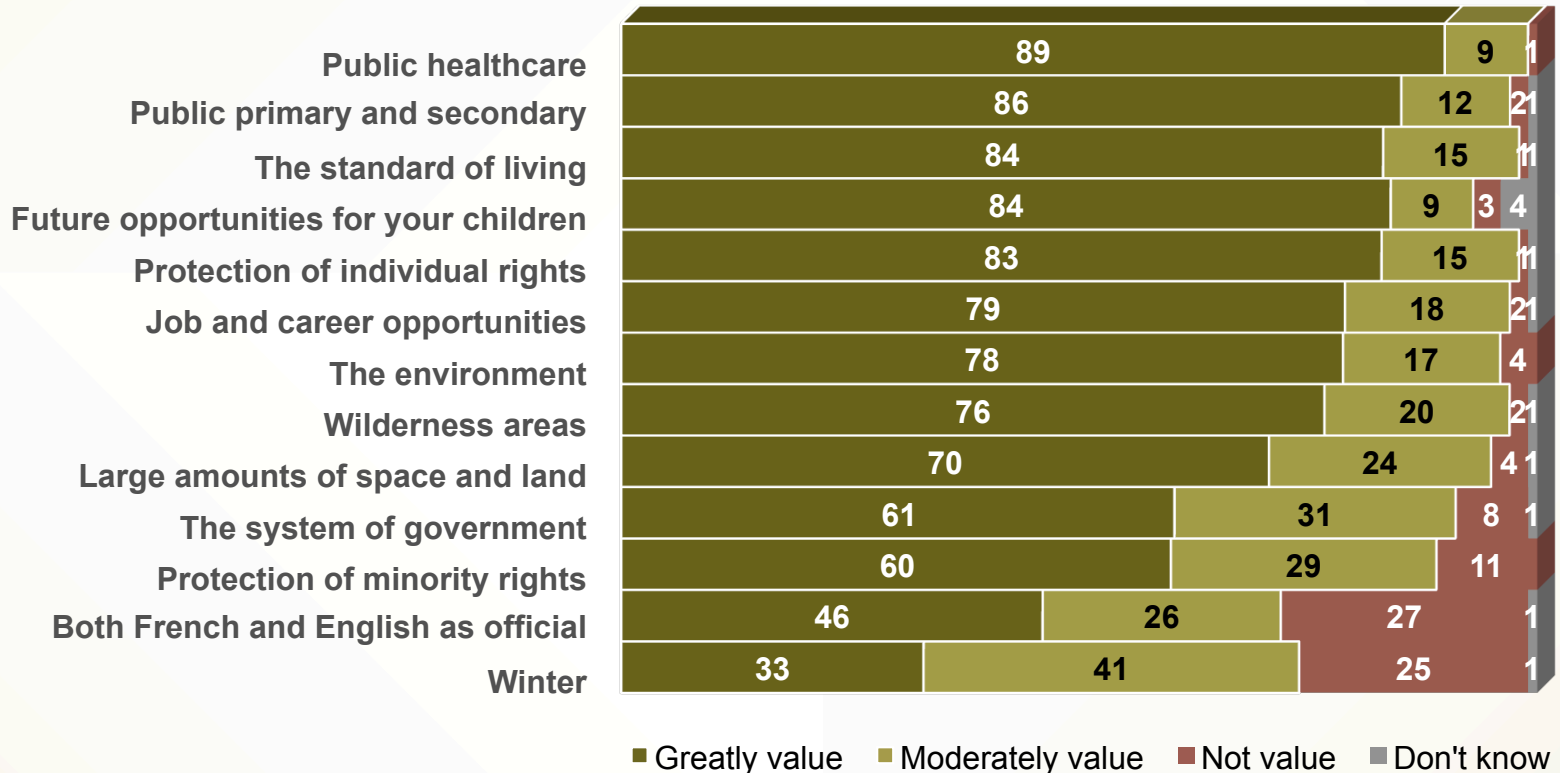
# Ranking Canada

- Do you think *Canada is the best country in the world in which to live?* (those saying “yes”)



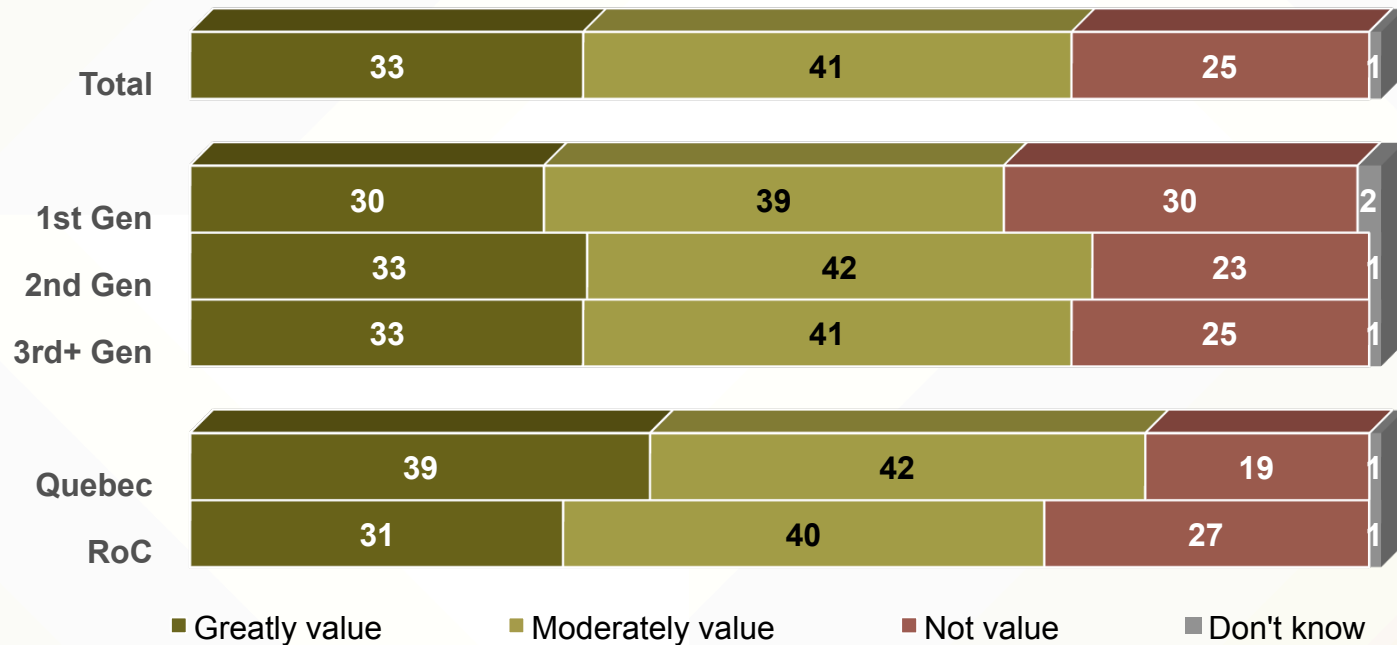
# Country Attributes

- How much or little do you value \_\_\_\_\_?



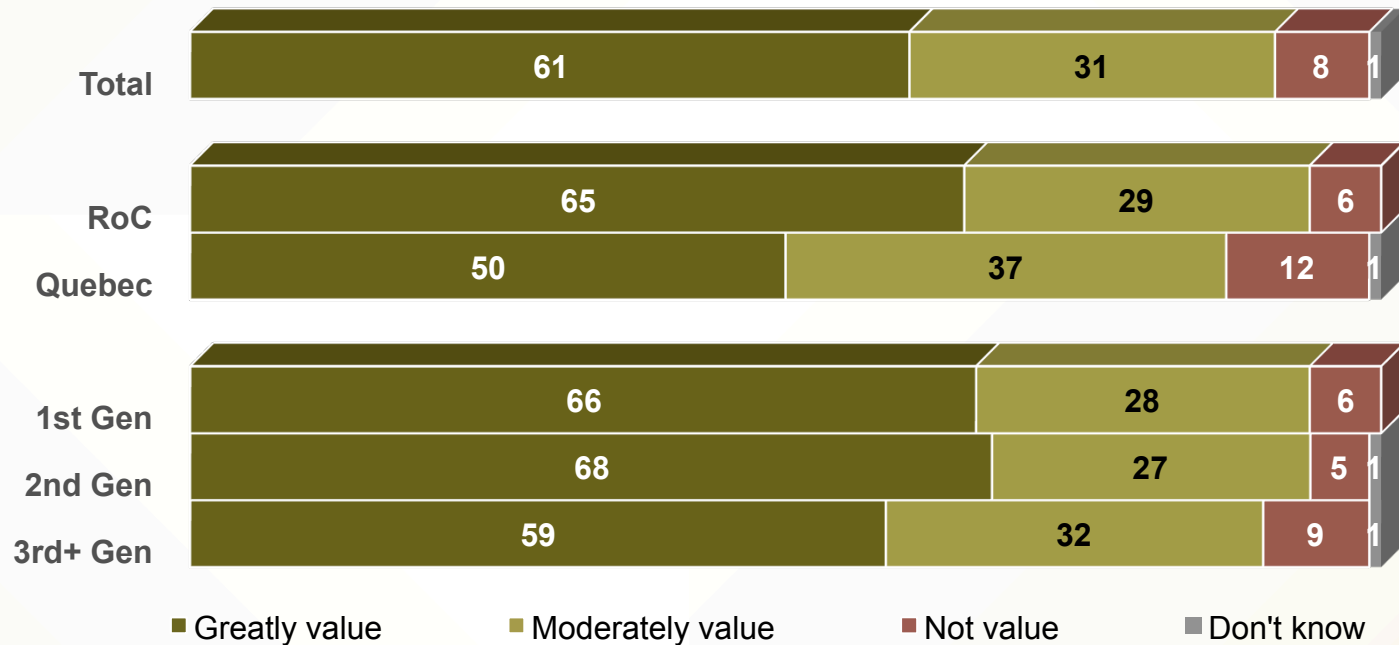
# Value: Winter

- How much or little do you value *winter*?



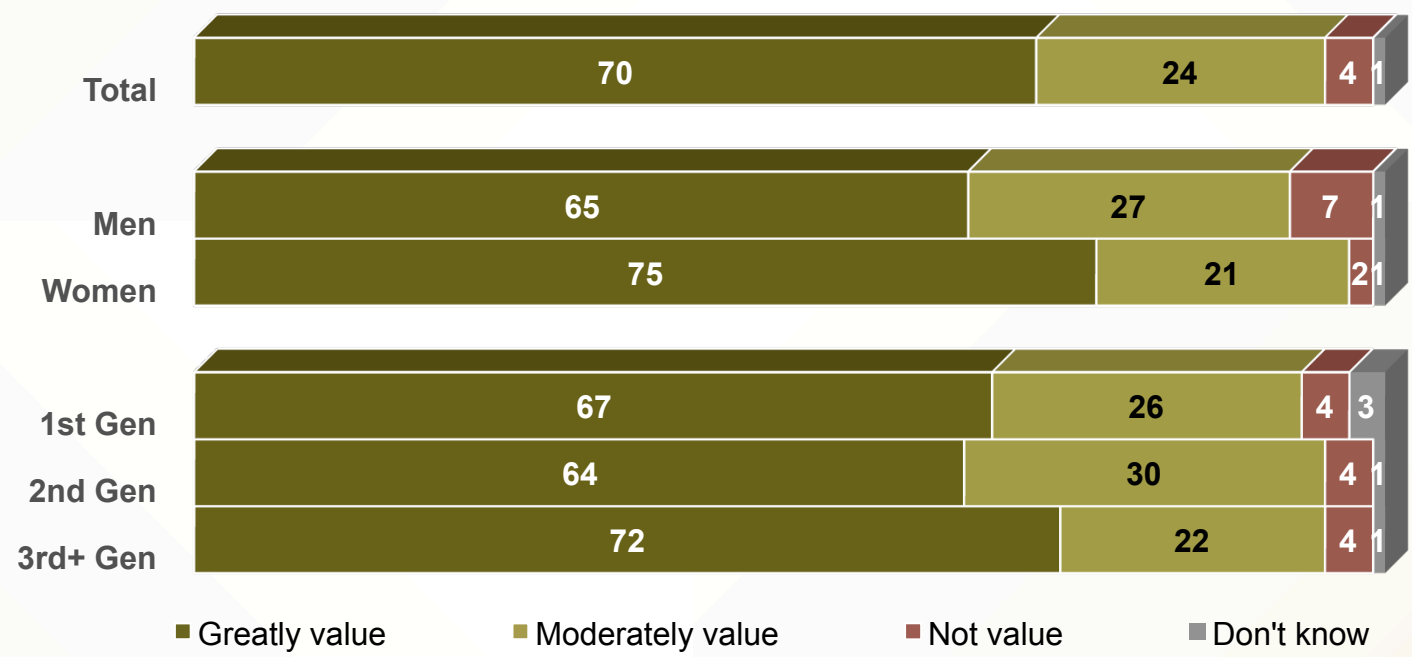
# Value: System of Government

- How much or little do you value the *system of government*?



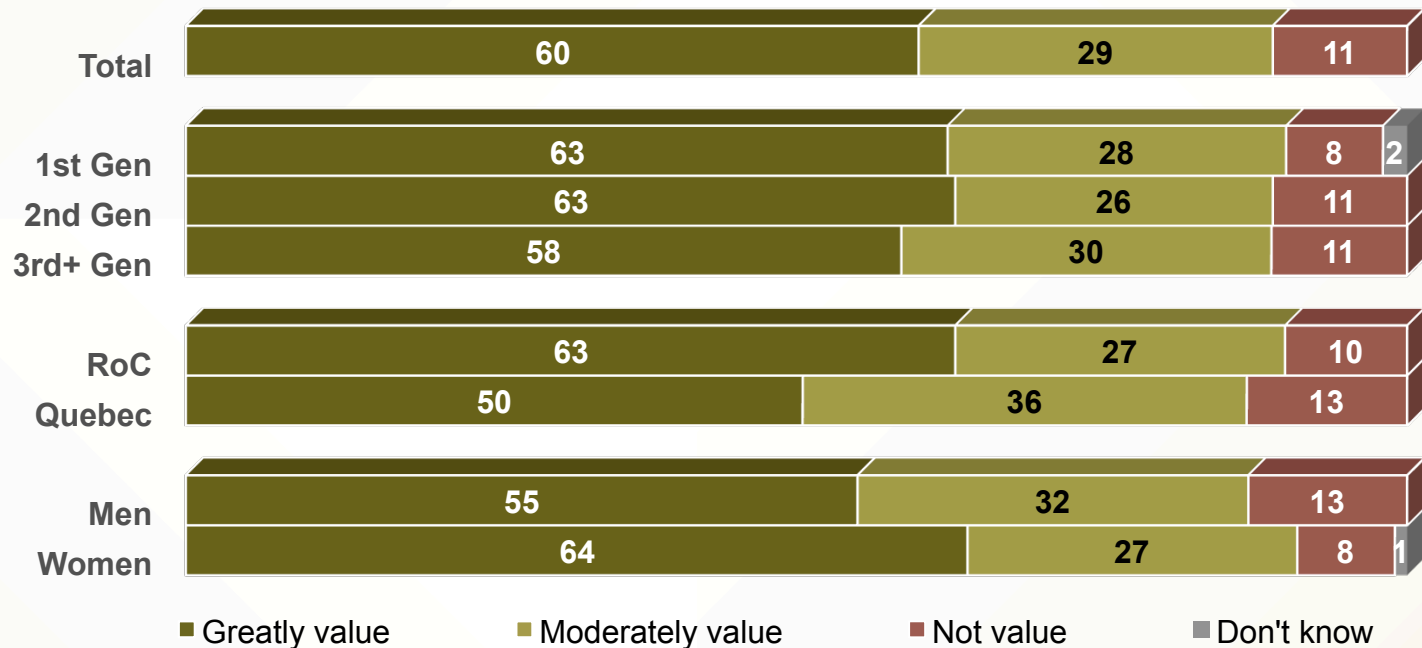
# Value: Vast Space/Land

- How much or little do you value *large amounts of space and land*?



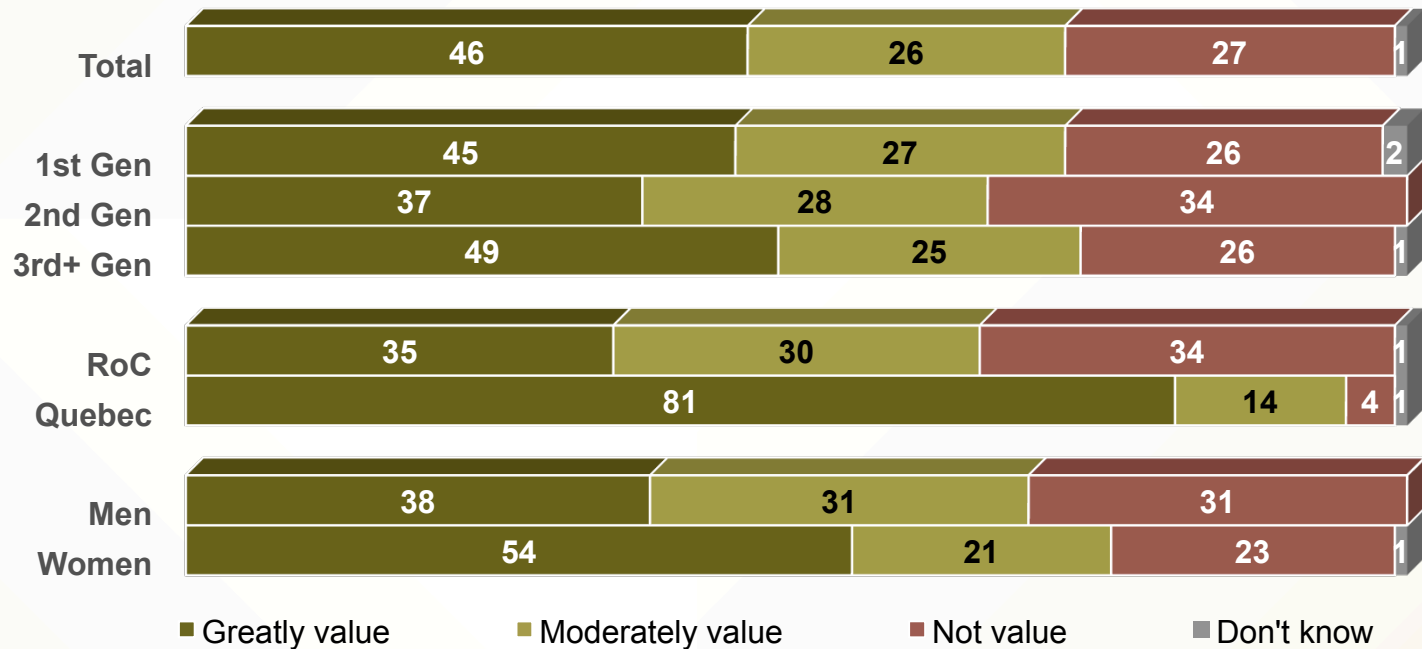
# Value: Protection of Minority Rights

- How much or little do you value *the protection of minority rights*?



# Value: Two Official Languages

- How much or little do you value *both French and English as official languages?*

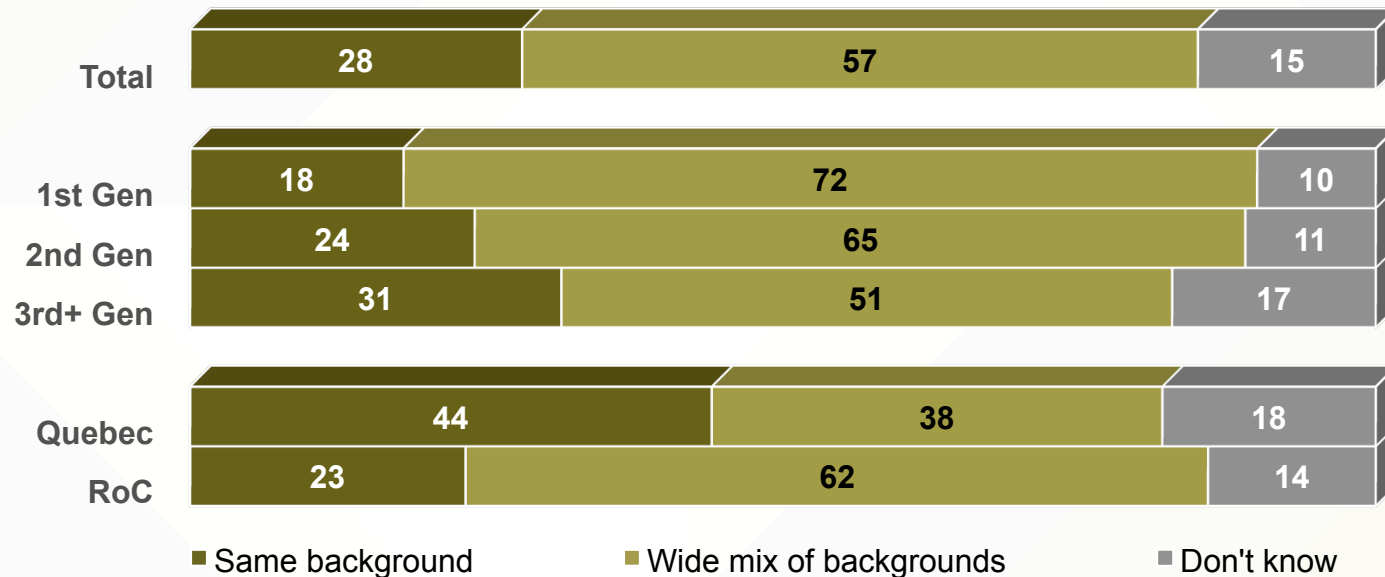


# Multiculturalism

- Most Canadians would rather live in an area with a wide mix of ethnic and cultural backgrounds than in an area composed of people of similar ethnic or cultural backgrounds. This is true even more so of new Canadians.
  - 72% of 1<sup>st</sup> generation Canadians would prefer to live in a mixed area than a homogenous one.
  - The outlier on this issue is French-speaking Quebec population, most of whom prefer to live with people of similar ethnic and cultural background.
- Few new Canadians see Canada as a strongly racist country.
  - Almost half disagree that Canadians are racist.
  - Much more likely to feel that Canada is a comfortable place for them to live.

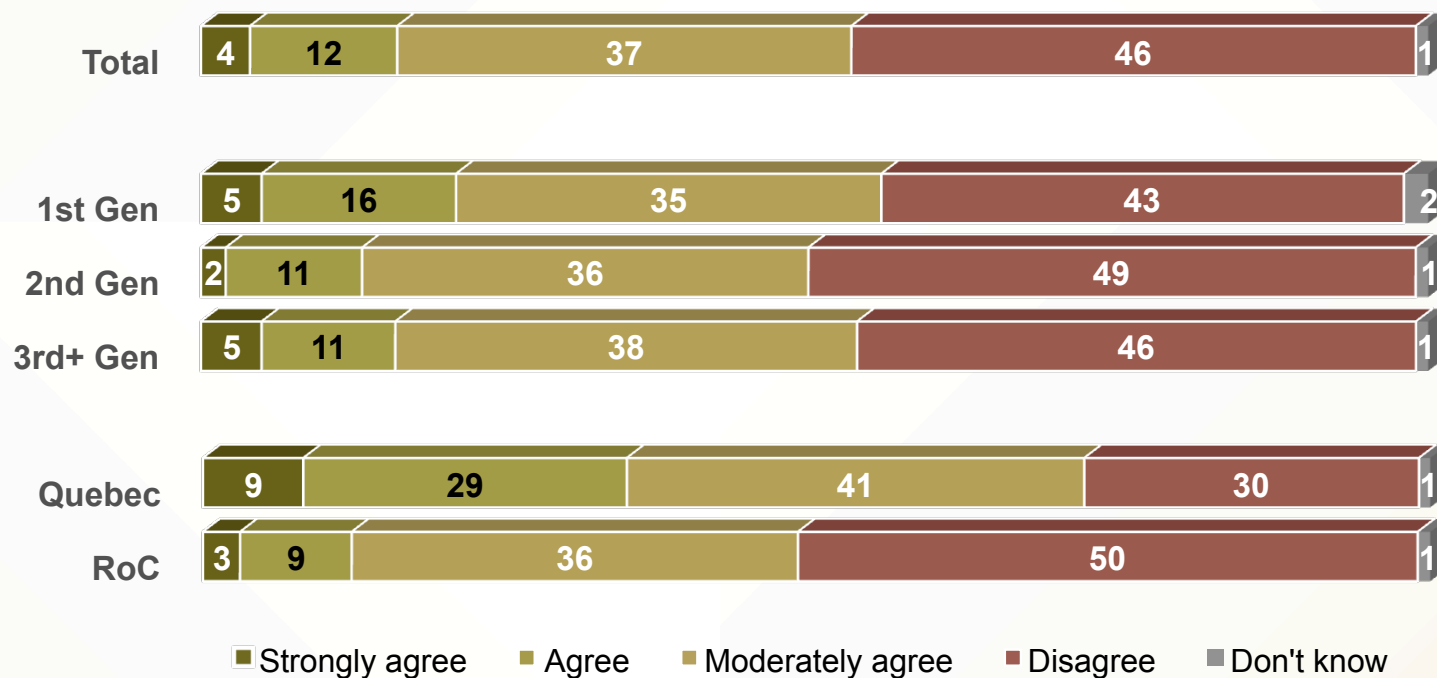
# Neighbourhood Cultural Preference

- Do you prefer to live in *an area where there are mostly other people of your cultural or ethnic backgrounds or where there is a wide mix of ethnic and cultural backgrounds?*



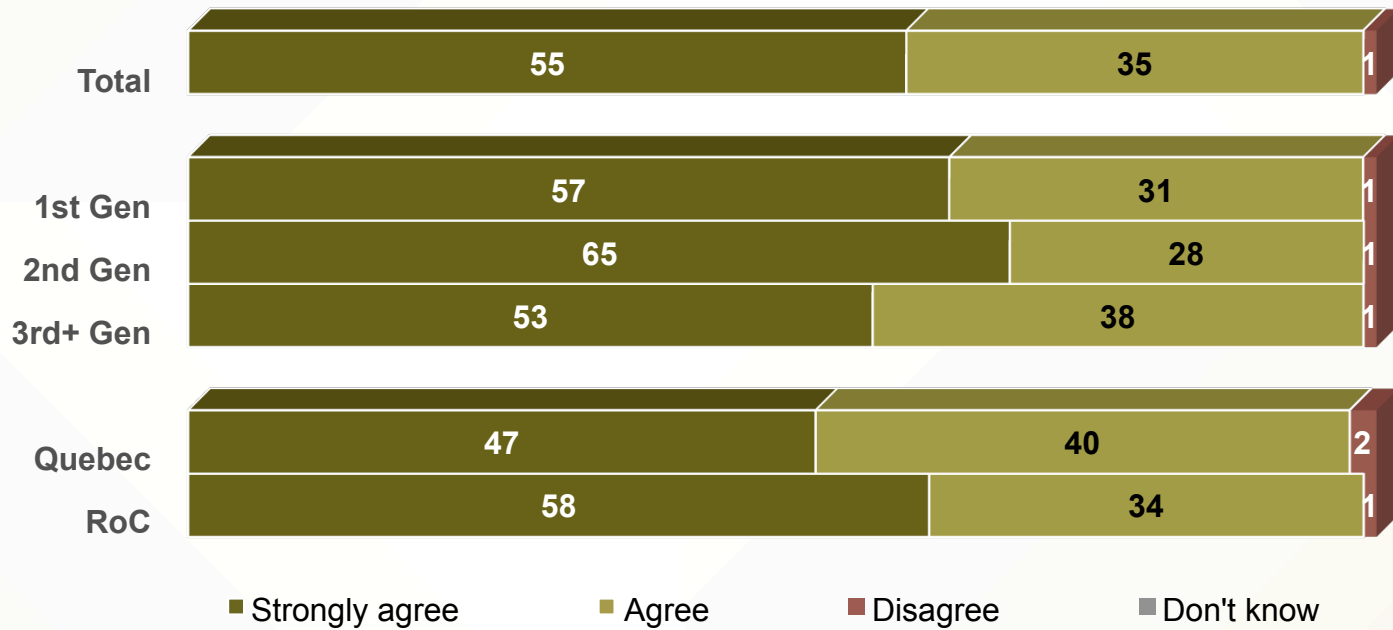
# Perceptions of Racism

- Agree/Disagree: *Canadians are prejudiced against persons of colour or of different ethnic backgrounds*



# Comfort in Canada

- Agree/Disagree: *Canada is a comfortable place for me to live*

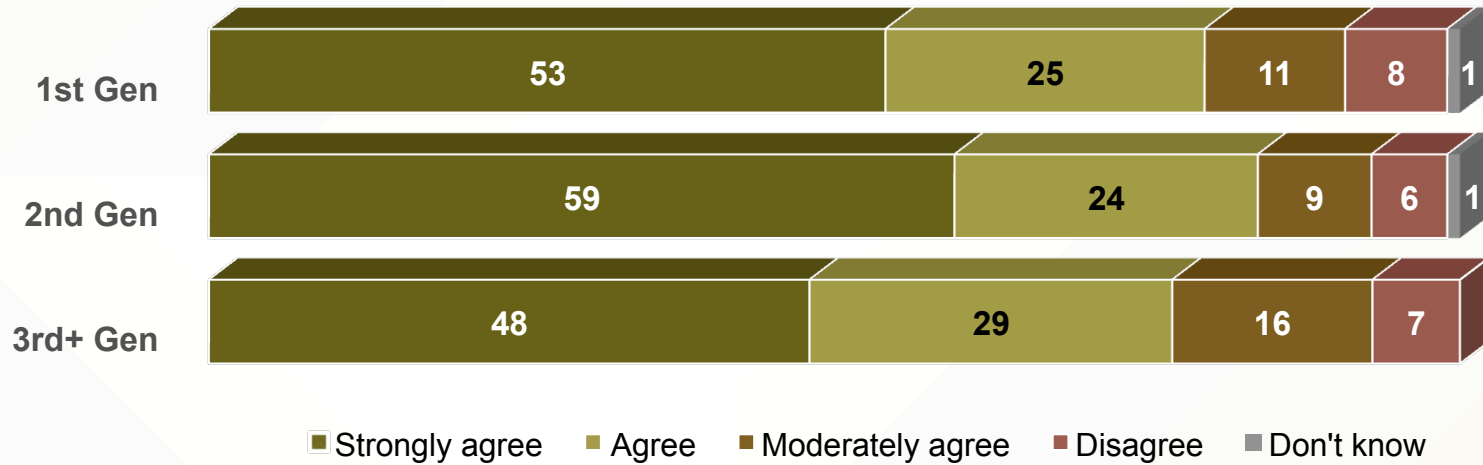


# Immigrant Rights and Opportunities

- New Canadians are almost unanimous in their belief that they have the same rights and opportunities as any other Canadians. In fact, they are more likely to believe that than 3<sup>rd</sup> generation plus Canadians.
  - The people in Canada least likely to believe this are French-speaking Quebec residents
- There is a latent sense of foreboding that perhaps the best days are behind. The typically strong belief that the next generation will have it better than this one is very tempered in these survey results.

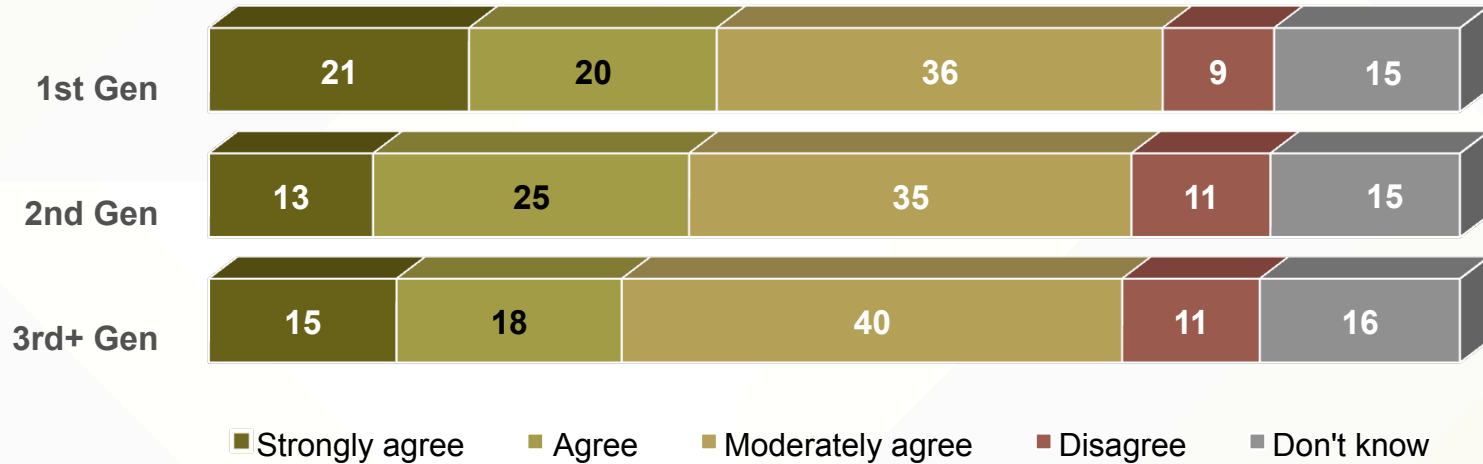
# Immigrant Rights and Opportunities

- Agree/Disagree: *I have the same rights and opportunities as any other Canadians*



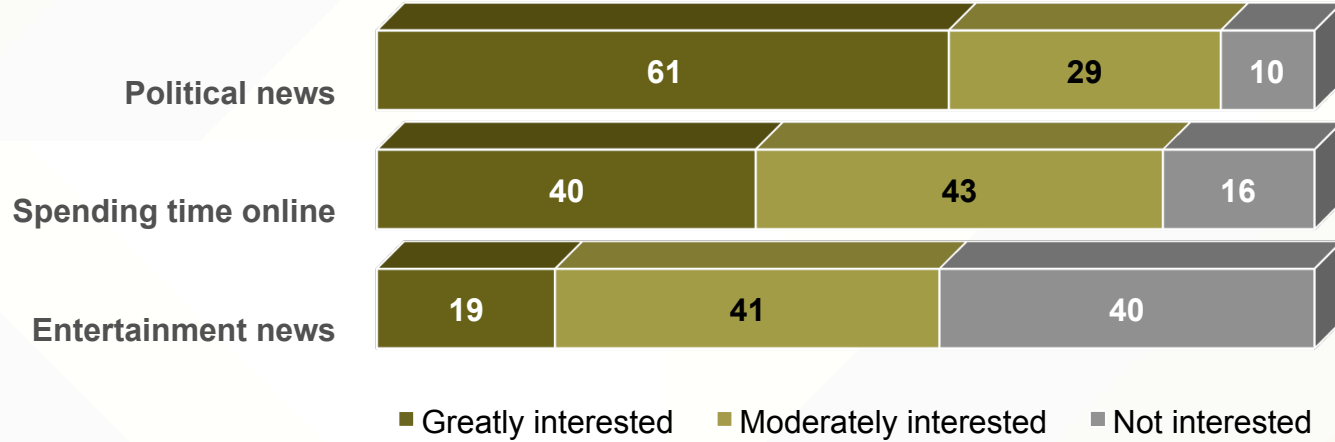
# Immigrant Rights and Opportunities

- Agree/Disagree: *My children will have a better life than I had*



# Gathering Information

- How interested are you in \_\_\_\_\_?

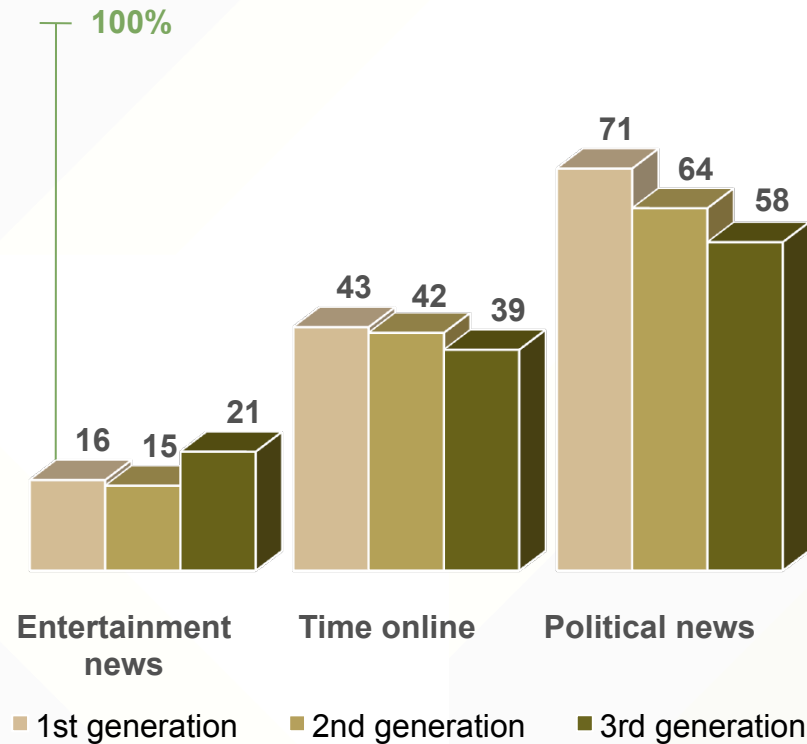


# Gathering Information

- Most Canadians have picked up the habit of hanging around online. 84% of Canadians are interested in being online. Interest peaks before 30 years old and tapers off significantly over 40 years old. There is no new Canadian difference in terms of time spent online.
- Television viewing, which tends to be more prevalent among men and non parents, consumes at least as much time, if not more, among new Canadians as 3<sup>rd</sup> generation plus.
- Yet new Canadians display little interest in non-English programming. Eighty percent of 1<sup>st</sup> generation Canadians and 94% of 2<sup>nd</sup> generation said they spend less than an hour a week watching television in a language other than English or French.

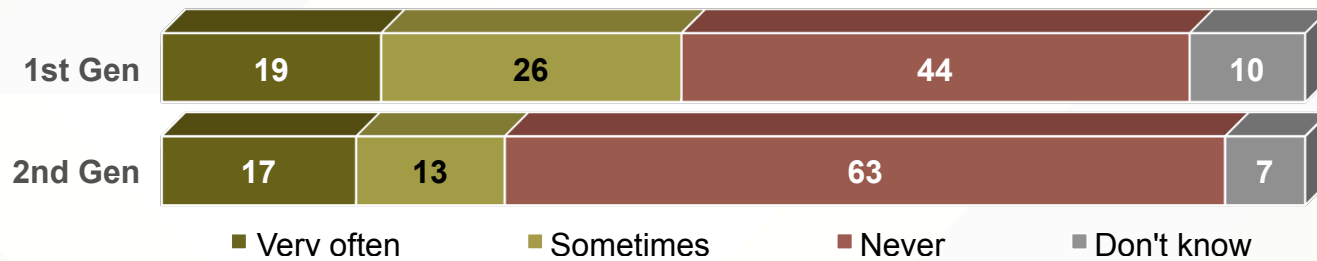
# Gathering Information

- How interested are you in \_\_\_\_\_? (those who said “greatly interested”)



# Frequency of Reading Mother Tongue Publications

- How often do you read a newspaper or publication published in the first language you learned or that of your parents if different than French or English?

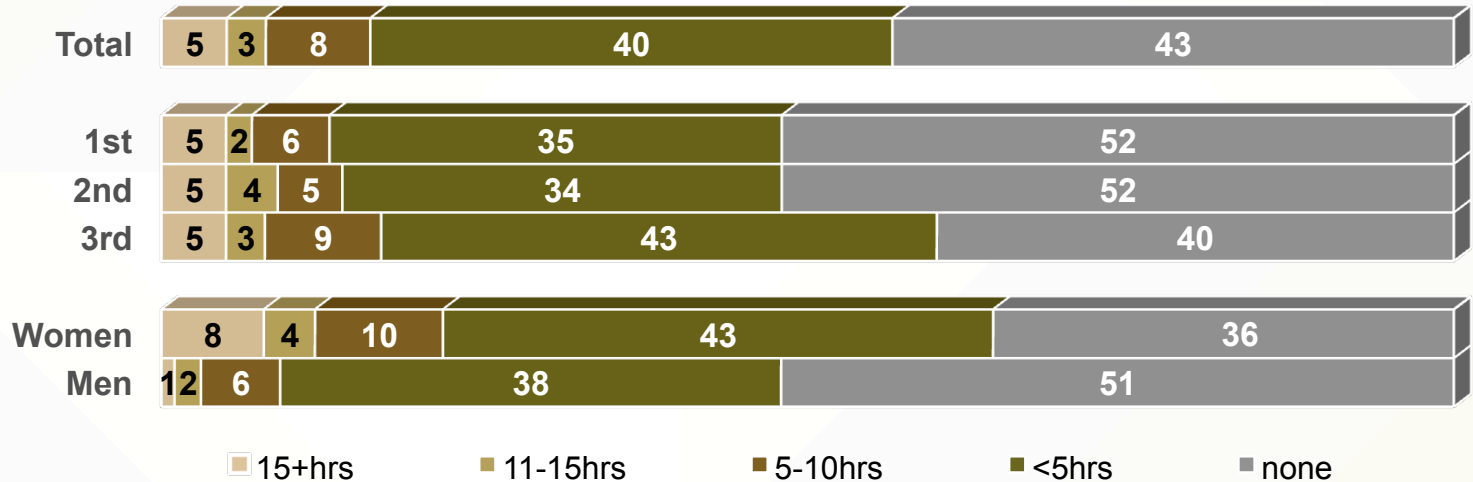


# Gathering Information

- Social networking has become highly prevalent among Canadians under the age of 40. Of respondents to this survey, up to age 35 a full 80% of Canadians spend time in a week on Facebook or the equivalents. However, new Canadians are less likely to be engaged. In part this may be because there appears to be a bias in participating to the English language.
- Women, especially parents, have to rush their way through the newspaper if they get to read it at all. Less than ten percent of women or men said they spend no time in a week reading the newspaper, but 65% of women said that they spend less than four hours in a week reading the newspaper. Women are as likely to get their info from radio as a newspaper, while men are much more likely to get it from a newspaper. First and second generation Canadians are more likely to read a newspaper and more likely to spend more time reading the newspaper. They also read newspapers in their mother tongue – 45% of first generation and 30% of second generation.

# Social Networking

- How many hours a week do you spend online, social networking (e.g. Facebook, MySpace, twitter)



# Sports

- 2<sup>nd</sup> generation Canadians have similar sporting interests to 3<sup>rd</sup> plus generation, but 1<sup>st</sup> generation Canadians have strikingly different tastes.
- Overall, the Olympics, both winter and summer, and the NHL are the sporting activities with the broadest reach in the Canadian population.
  - The notion that hockey is the national pastime, however, would be belied by the fact that 40% of Canadians say they have little or no interest in it, although it is the only major sport with a strong following among women in Canada
  - The Olympics are notable for the interest level they draw from women.

# Sports – Football

- The CFL is of interest to significantly more Canadians than the NFL. The CFL has a strong following among 17% of Canadians – one in four men and one in ten women.
  - 70% of women have little or no interest in the CFL.
  - As expected, the league is more popular in Western Canada than in other regions.
  - 1<sup>st</sup> generation Canadians are half as likely to be interested in the CFL as 2<sup>nd</sup> generation or more.
- However, those numbers are stronger than the NFL. Only 12% of Canadians have a strong interest in the NFL, and only one in twenty women do.
  - Interest is more concentrated in Ontario than anywhere else. 1<sup>st</sup> generation Canadians are as interested in the NFL as the CFL.

# Sports – Olympics

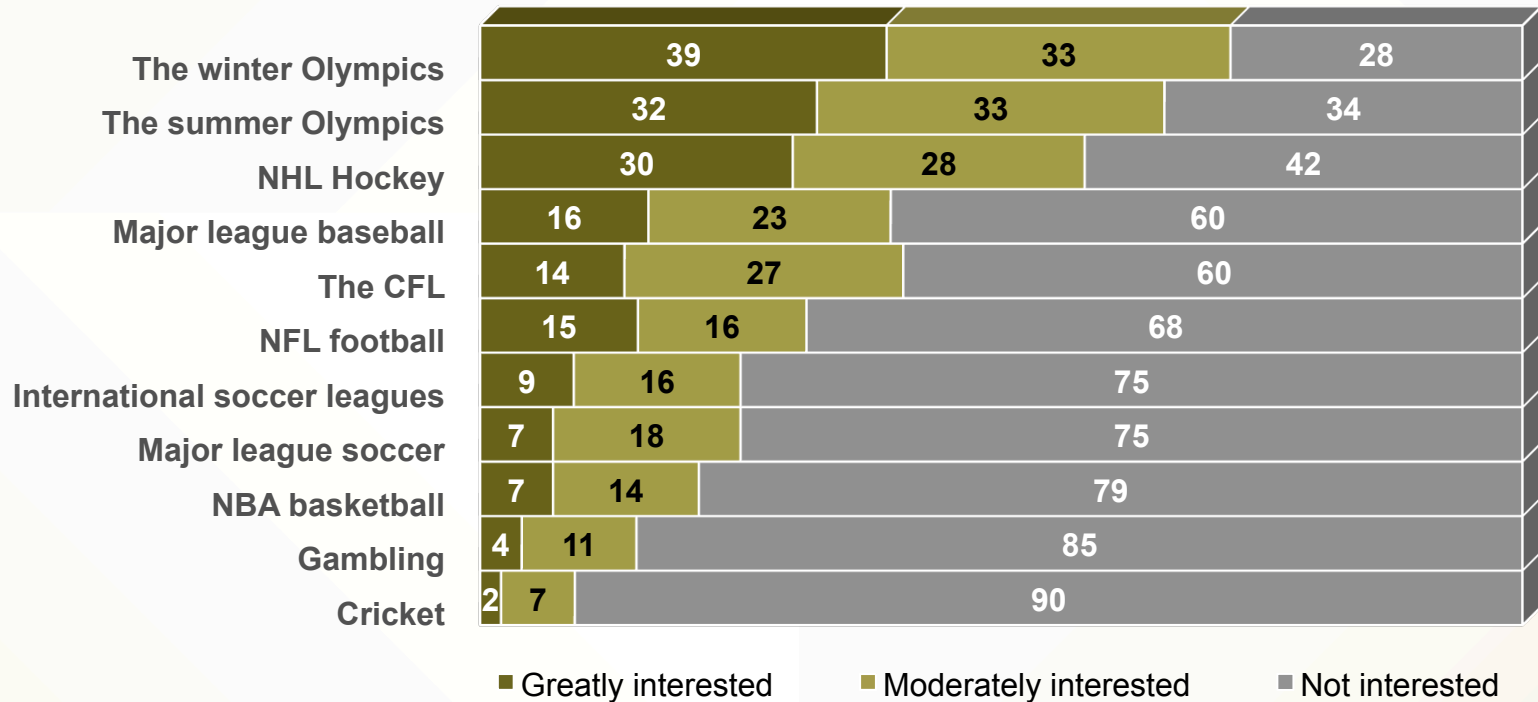
- The Winter Olympics have a stronger following in Canada than the Summer Olympics. One third of Canadians are very interested in the Winter Olympics and only 30% have little or no interest. Unlike other sports, this appeals to women and men equally.
- The Summer Olympics are of more interest to new Canadians, especially those with a mother tongue other than English or French, than to 3<sup>rd</sup> plus generations.

# Sports

- Baseball has a marginal following in Canada, concentrated among men in Ontario.
  - First generation Canadians have very little interest in it.
- The NBA has no significant fan base in Canada. Only 4% of Canadians have strong interest in it, which peaks out at 7% in Ontario. Four in five Canadians have no interest in it at all.
- Soccer is a sport with a limited following over in Canada, but with a strong following among first and second generation Canadians.
- Women are more likely to be strongly interested in gambling than in football, baseball, basketball or soccer.

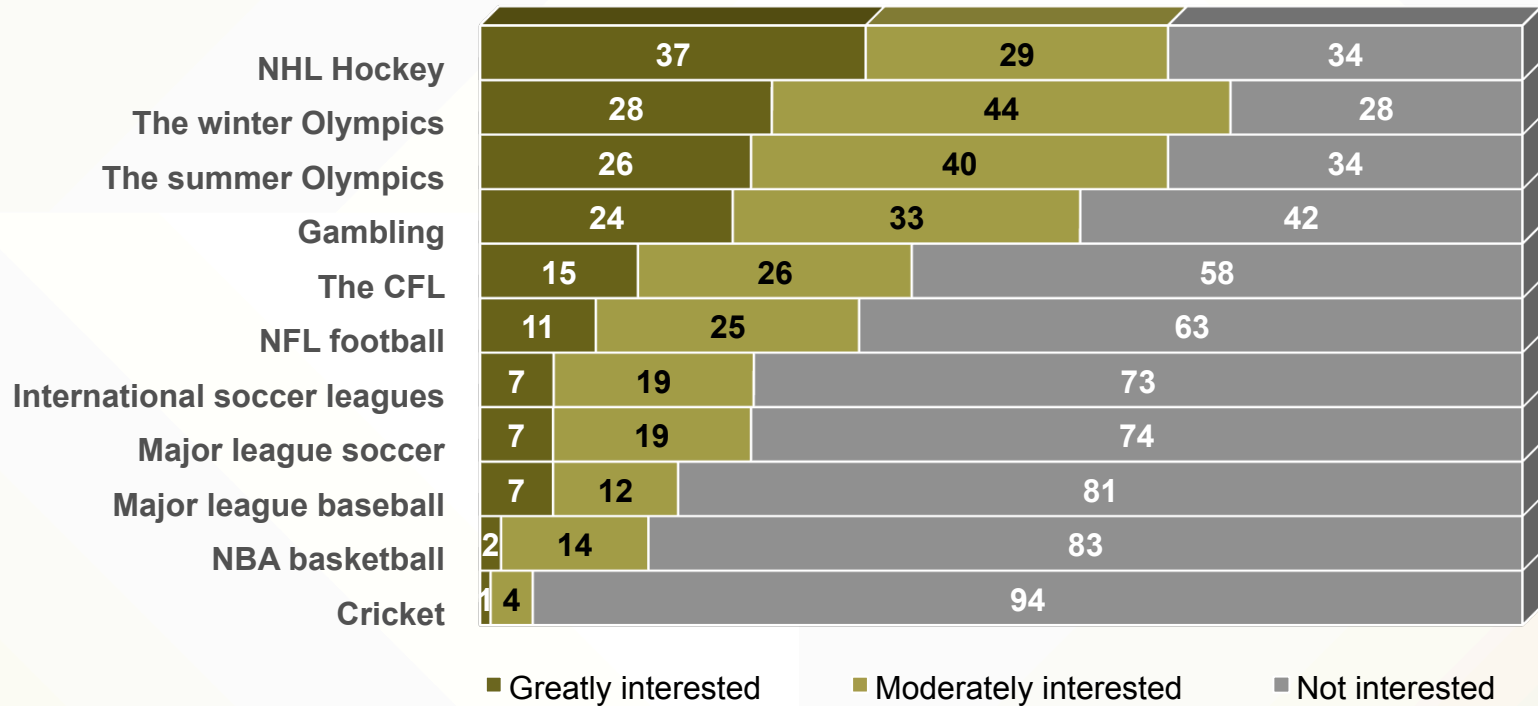
# Interest in Sporting Events: Ontario

- How interested are you in \_\_\_\_\_?



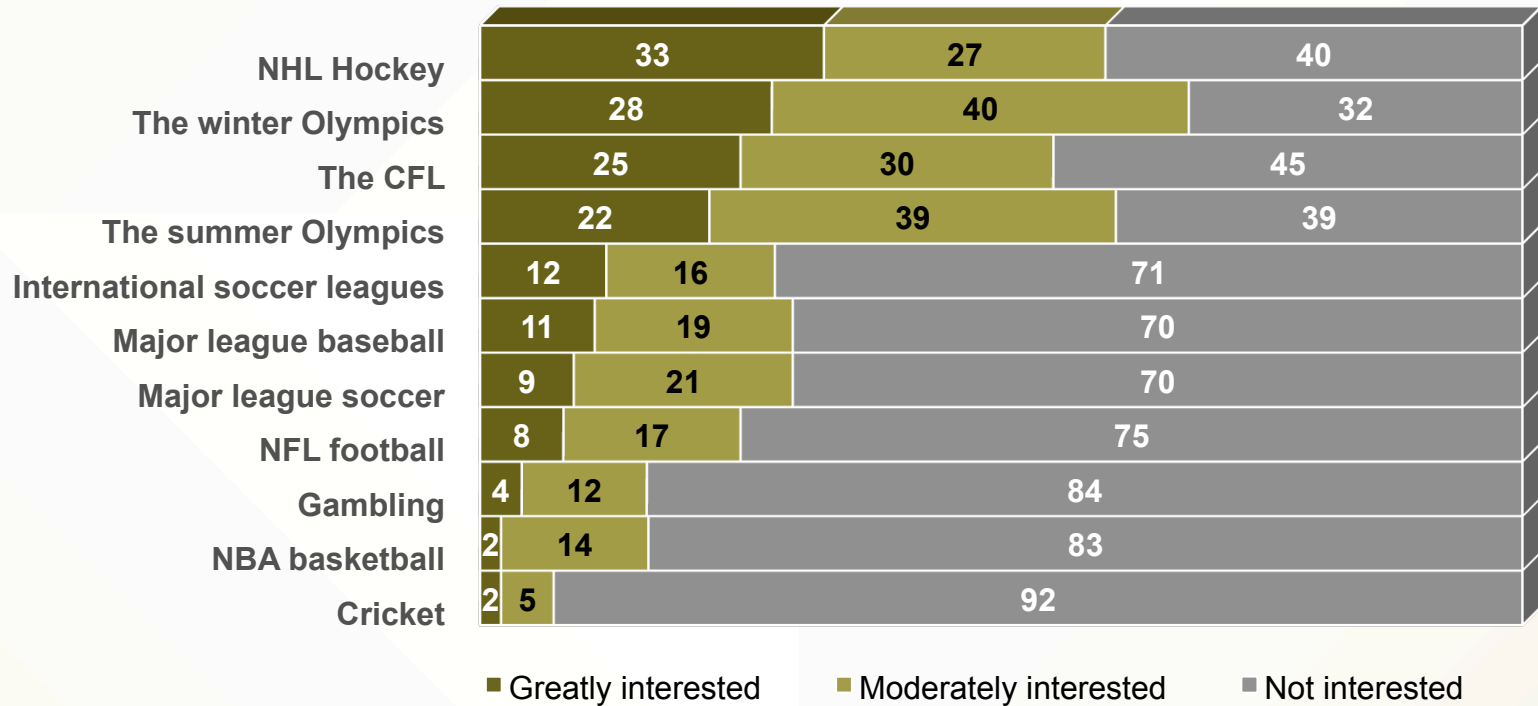
# Interest in Sporting Events: Quebec

- How interested are you in \_\_\_\_\_?



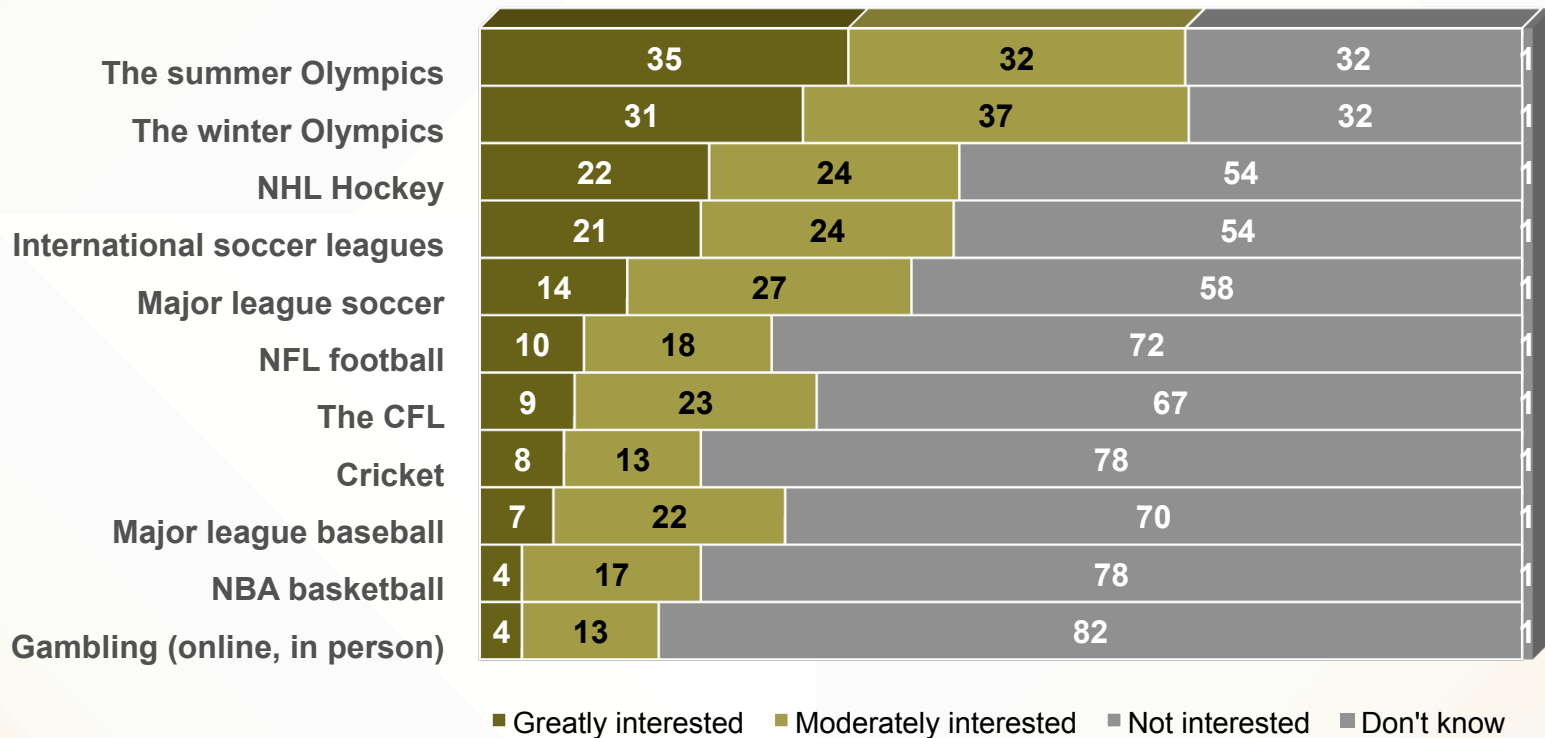
# Interest in Sporting Events: West

- How interested are you in \_\_\_\_\_?



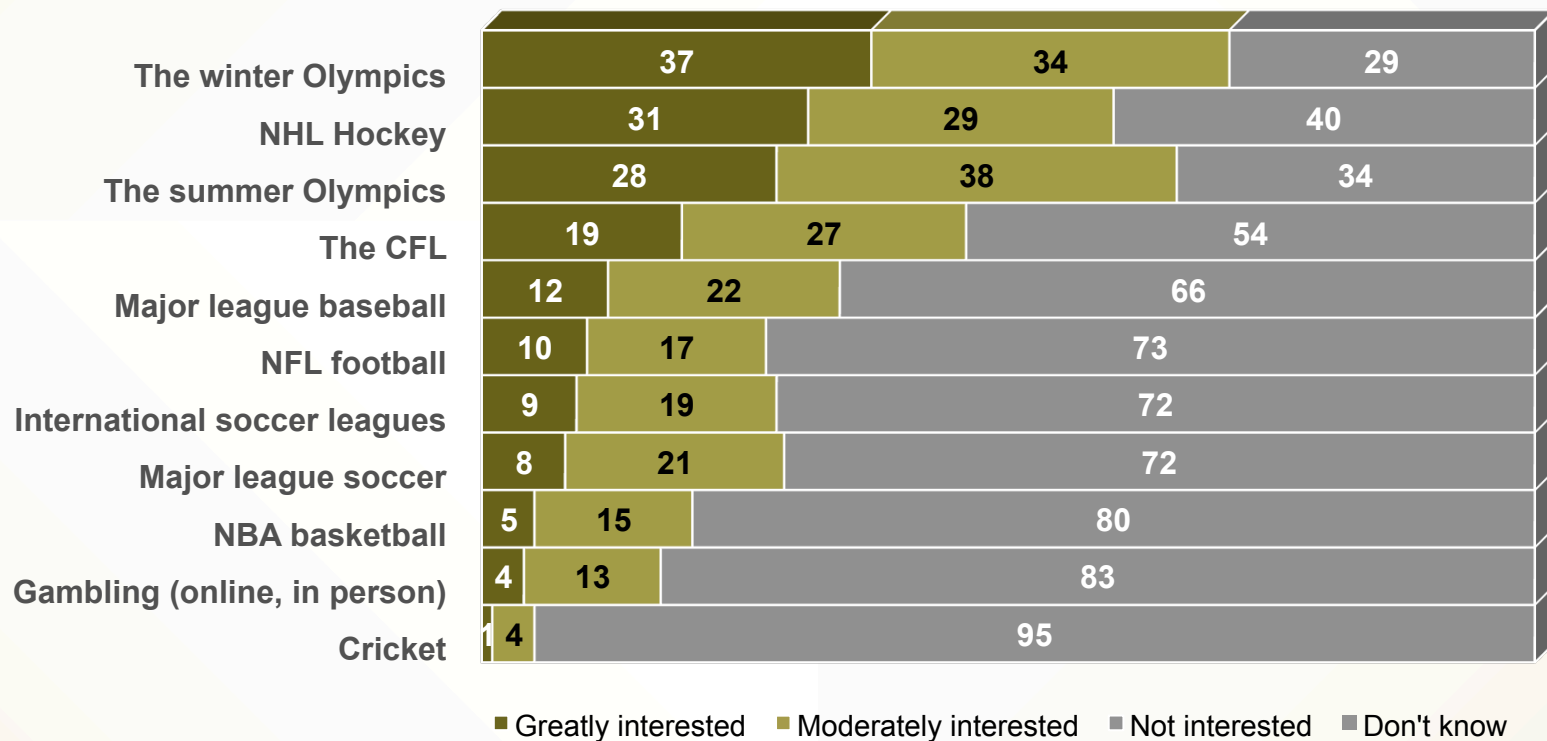
# Interest in Sporting Events: 1<sup>st</sup> Generation

- How interested are you in \_\_\_\_\_? (1<sup>st</sup> generation Canadians, n=377)



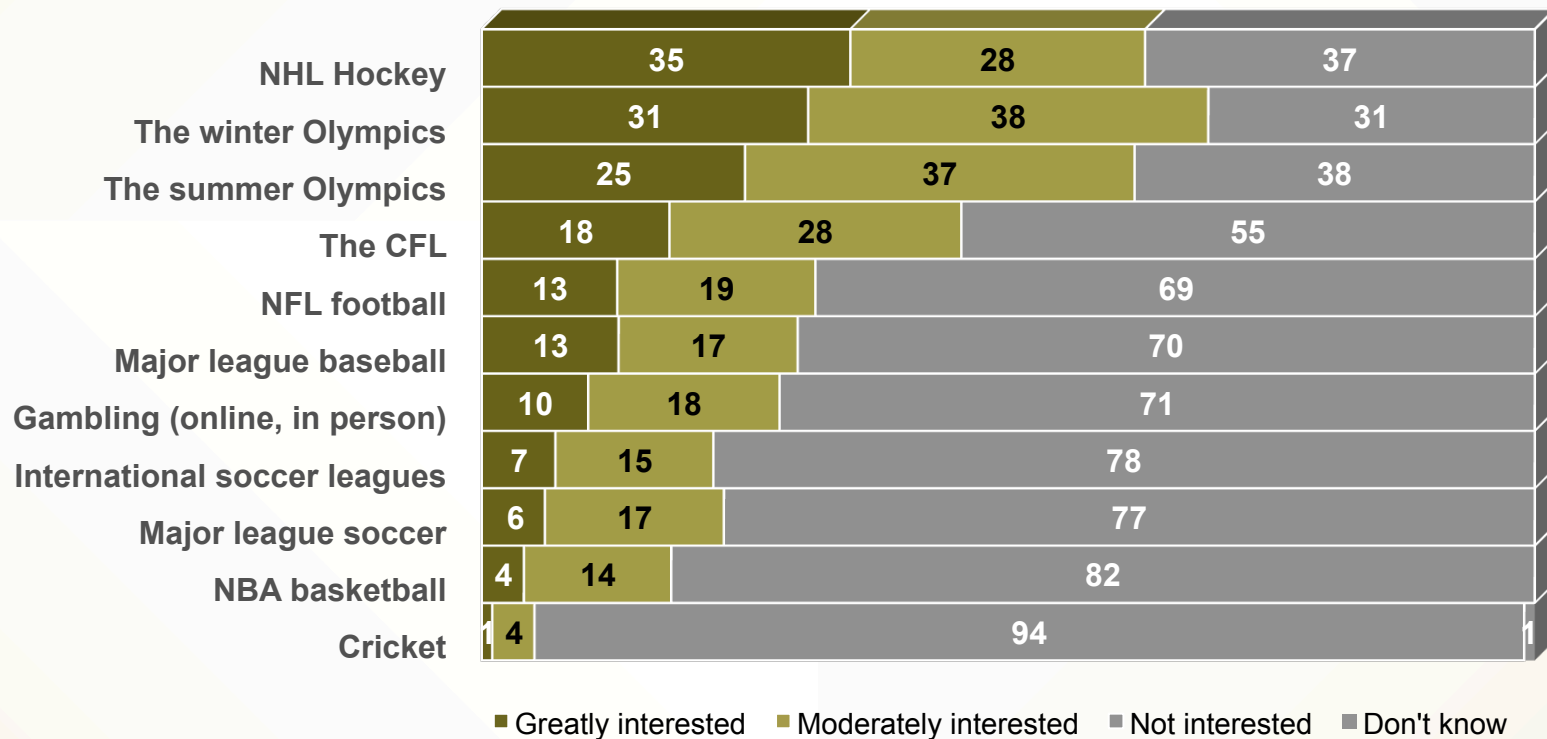
# Interest in Sporting Events: 2<sup>nd</sup> Generation

- How interested are you in \_\_\_\_\_? (2<sup>nd</sup> generation Canadians, n=515)



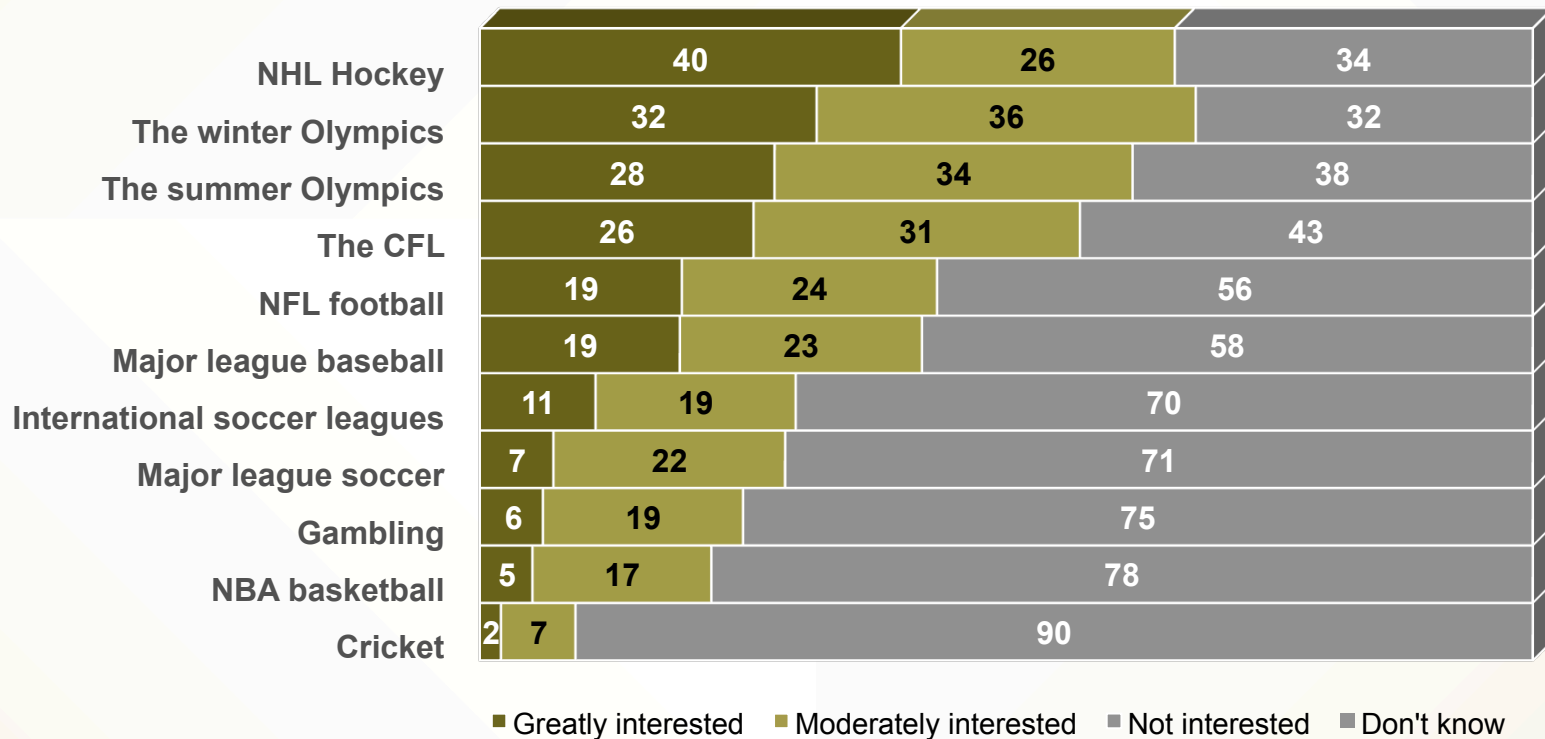
# Interest in Sporting Events: 3<sup>rd</sup> Generation

- How interested are you in \_\_\_\_\_? (3<sup>rd</sup> generation Canadians, n=745)



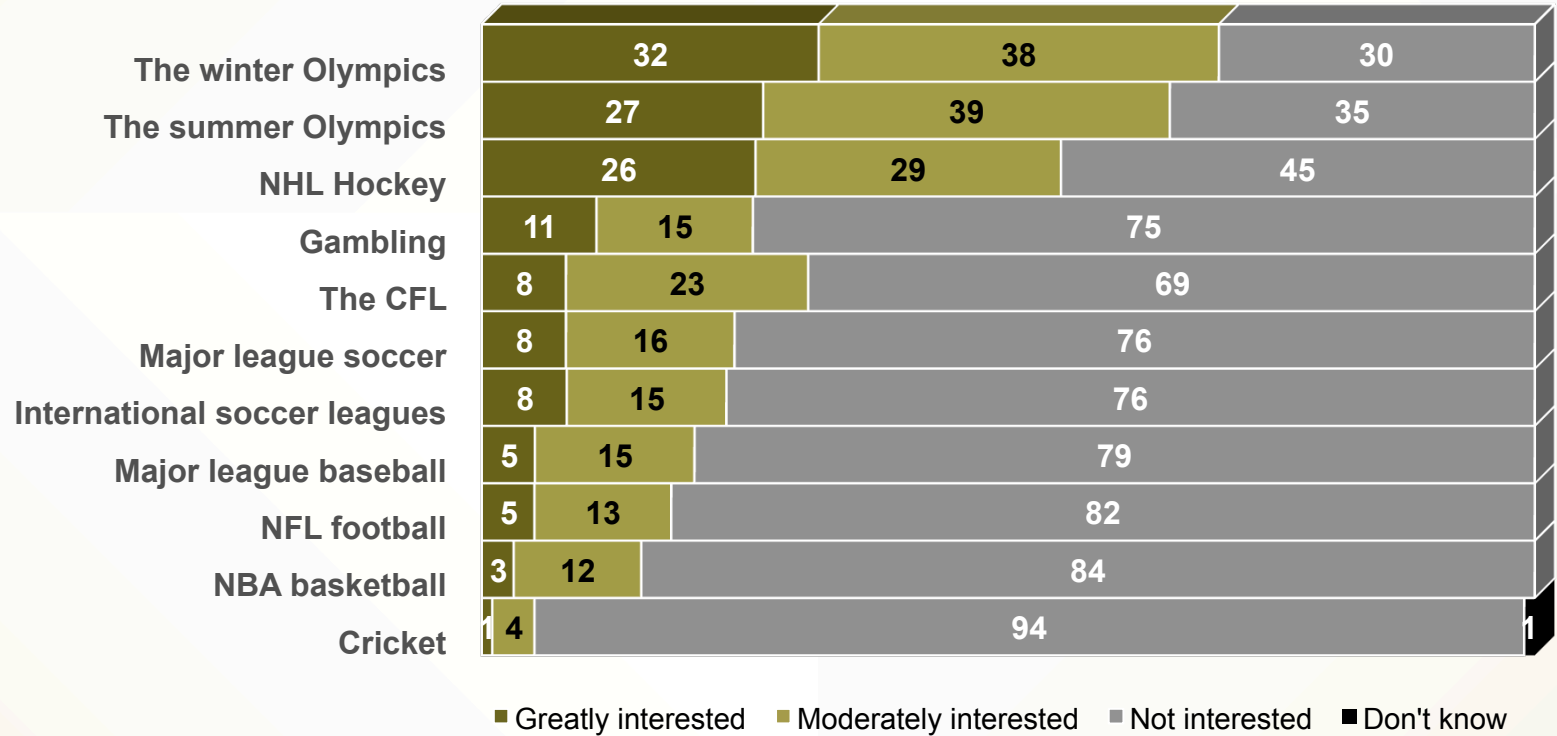
# Interest in Sporting Events: Men

- How interested are you in \_\_\_\_\_?



# Interest in Sporting Events: Women

- How interested are you in \_\_\_\_\_?

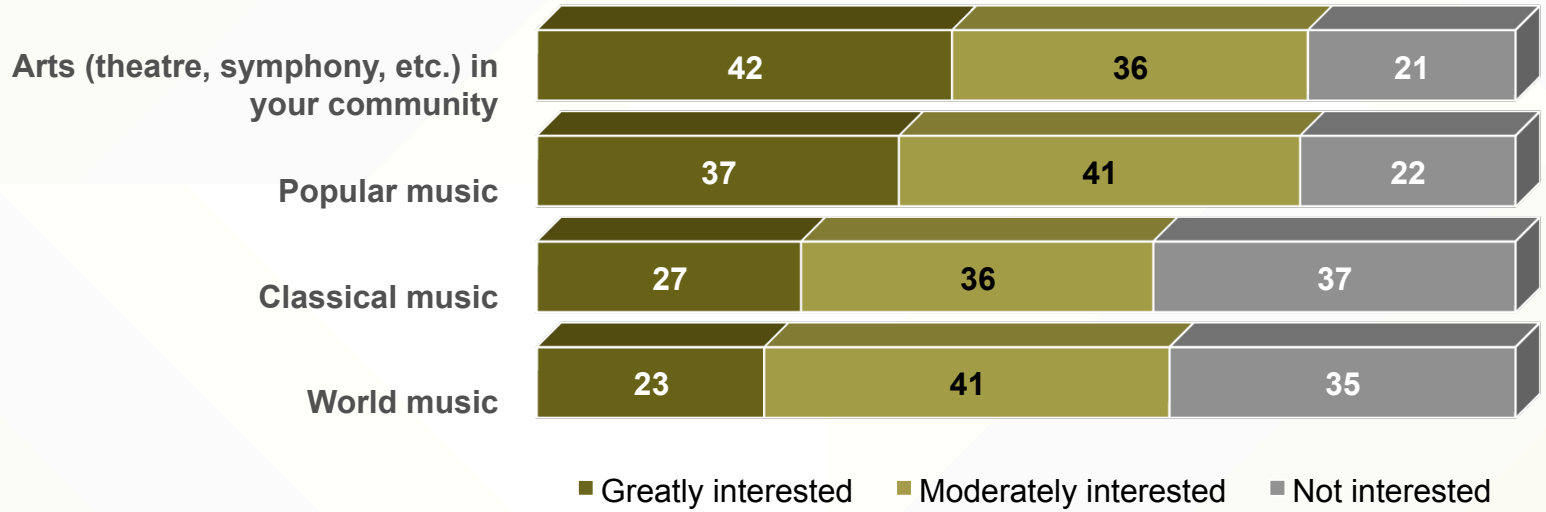


# Arts and Culture

- New Canadians bring very different tastes in music and culture than they find here in Canada.
- Newer Canadians are significantly more interested in community theatre and symphonies.
- Almost one in two new Canadians is very interested in classical music, compared with one in five 3<sup>rd</sup> generation plus Canadians. Conversely, new Canadians are much less likely to be interested in popular music, which is twice as popular among 3<sup>rd</sup> generation plus Canadians as is classical music.
- There is a reasonable interest level for world music in the overall population, but it is, expectedly, heavily pronounced among new Canadians, particularly 1<sup>st</sup> generation.
- Perhaps because of the types of arts they focus on, there is much less interest in entertainment news among 1<sup>st</sup> and 2<sup>nd</sup> generation Canadians.

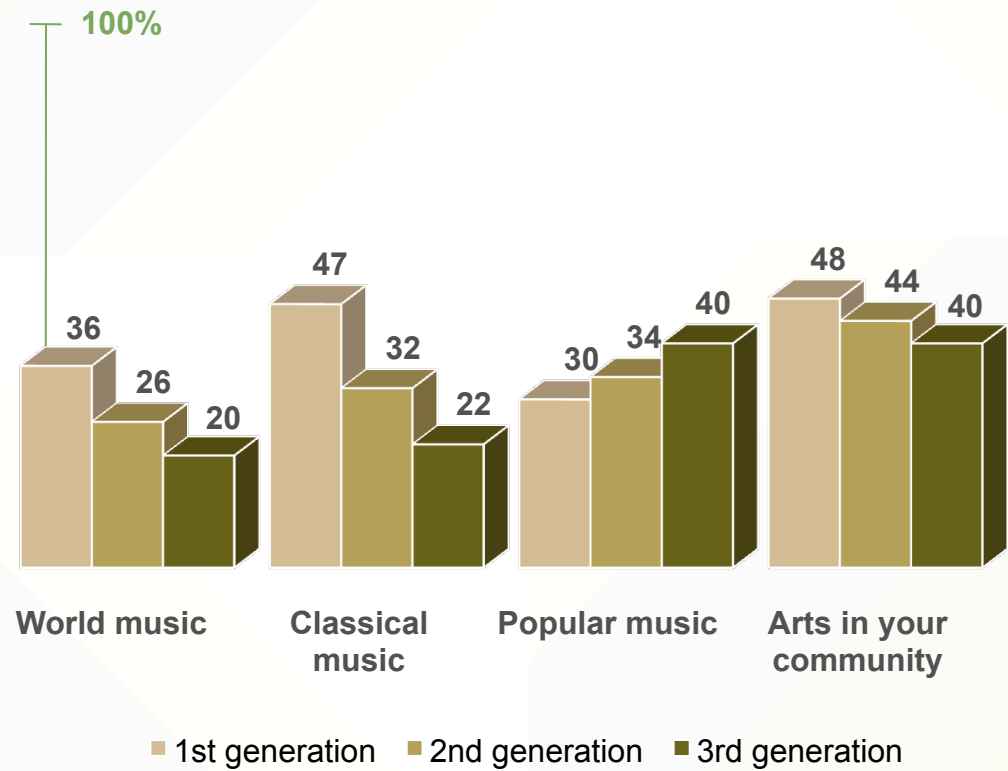
# Interest in Arts and Musical Genres

- How interested are you in \_\_\_\_\_?



# Interest in Arts and Musical Genres

- How interested are you in \_\_\_\_\_? (those who said “greatly interested”)



# Conclusions

- Canadians are expecting a short and relatively painless recession. Should forecasts be correct, consumer confidence could crash even further
- There are significant differences in taste, activities and attitudes between new Canadians and those who have been here for more than two generations
- Comparing first and second generations would lead us to believe that Canada will change the new Canadians more than they will change Canada
- In fact, values are more likely to be reinforced than threatened
- Traditional sports, other than the iconic hockey, may see their hold on the population weakened