

Understanding Canada: Insights from the Latest Demographic, Psychographic and Segmentation Data

August 21st, 2024

ENVIRONICS
ANALYTICS

Land Acknowledgement

We acknowledge the land of where our head office resides is the traditional territory of many nations including the Mississaugas of the Credit, the Anishnabeg, the Chippewa, the Haudenosaunee and the Wendat peoples and is now home to many diverse First Nations, Inuit and Métis peoples.

We also acknowledge that Toronto is covered by Treaty 13 with the Mississaugas of the Credit.

Housekeeping

All attendees will be on listen-only mode.

Use the Q&A feature to submit your questions.

You may submit questions anonymously.

Presentation recording will be emailed to all registrants and available on EA website.

Today's Presenters



Jan Kestle
President



Sarah Greene
Director,
Demographic Data



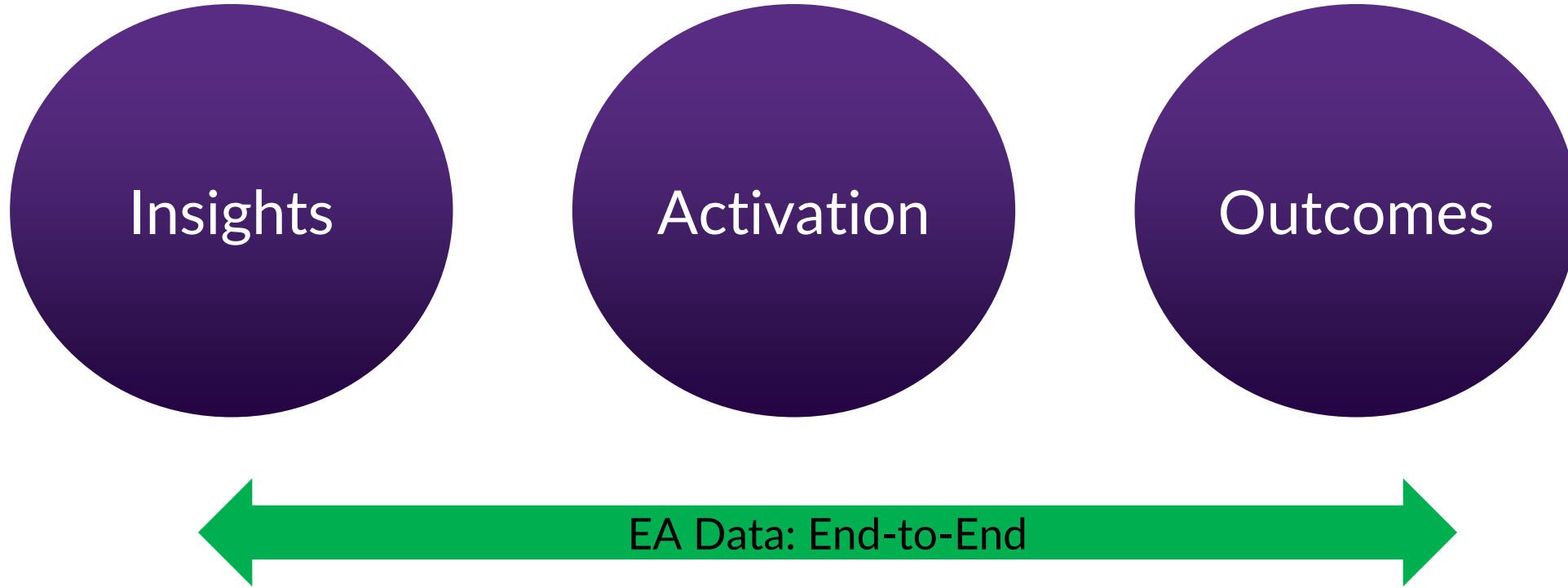
Brigitte Vitali
Senior Director,
Insights



Allen Davidov
Senior Vice President
& Practice Leader

It starts with data: comprehensive, high-quality, easy-to-use, safe

But that's only the beginning



DemoStats

Comprehensive Demographic Data

Comprehensive Demographic Data

Estimates for 2024 and
historical year 2019
as well as **projections**
for 3, 5, and 10 years

734 variables
across **42** demographic and
socioeconomic categories

The **foundation** of all data
products: PRIZM, MoverStats,
NewToCanada

- ✓ **Comprehensive**
- ✓ **Privacy-Compliant +**
- ✓ **Cross-Industry Applications**

Innovative Modelling Techniques

Built From the Ground Up

Using Innovative Modelling Techniques

Built using foundational data
20 key data sources



Statistics Canada
Statistique Canada



Immigration, Refugees
and Citizenship Canada



Top Down, Bottom Up Approach



Province

Census Division

*"regions,
counties"*

Census Subdivision/
Census Tract

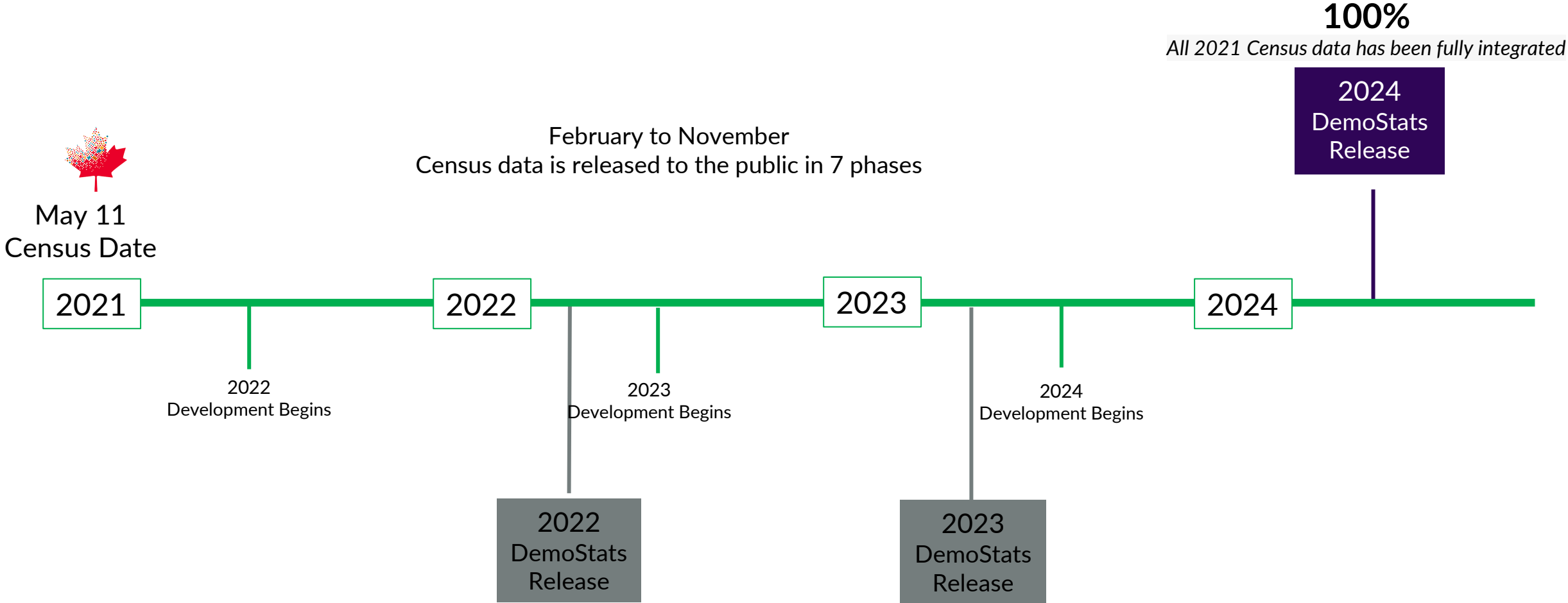
*"municipalities
towns, cities"*

Dissemination Area

"neighbourhoods"

Postal Code

Full Incorporation of the 2021 Census



What's New with Our Methodology?

Nearly **a year dedicated** to developing demographic products through integration and estimation. Utilizing the **latest methodologies** and incorporating **new data sources**.

In your hands faster

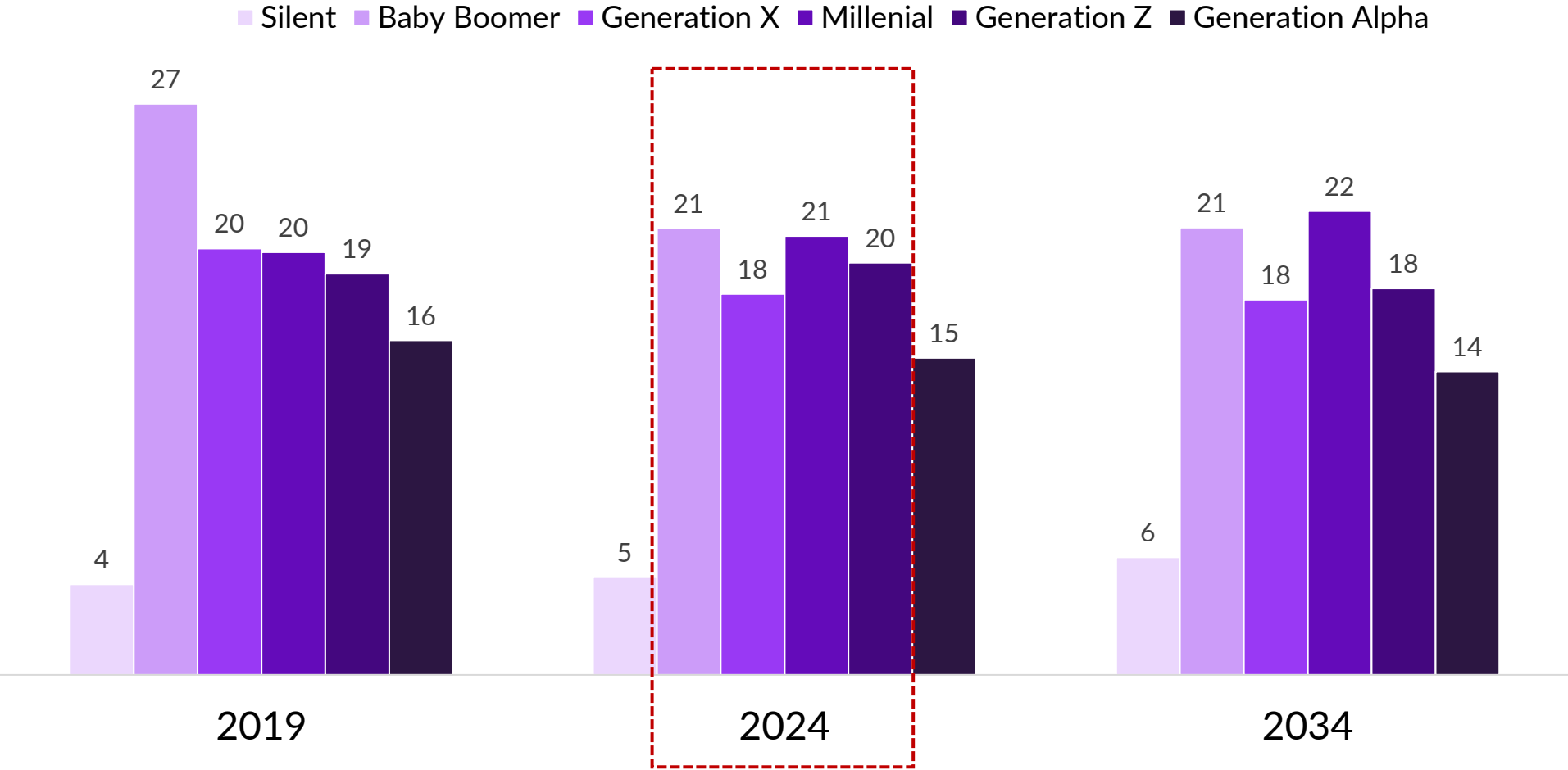
Examples of changed variables:

Multigenerational Households

and

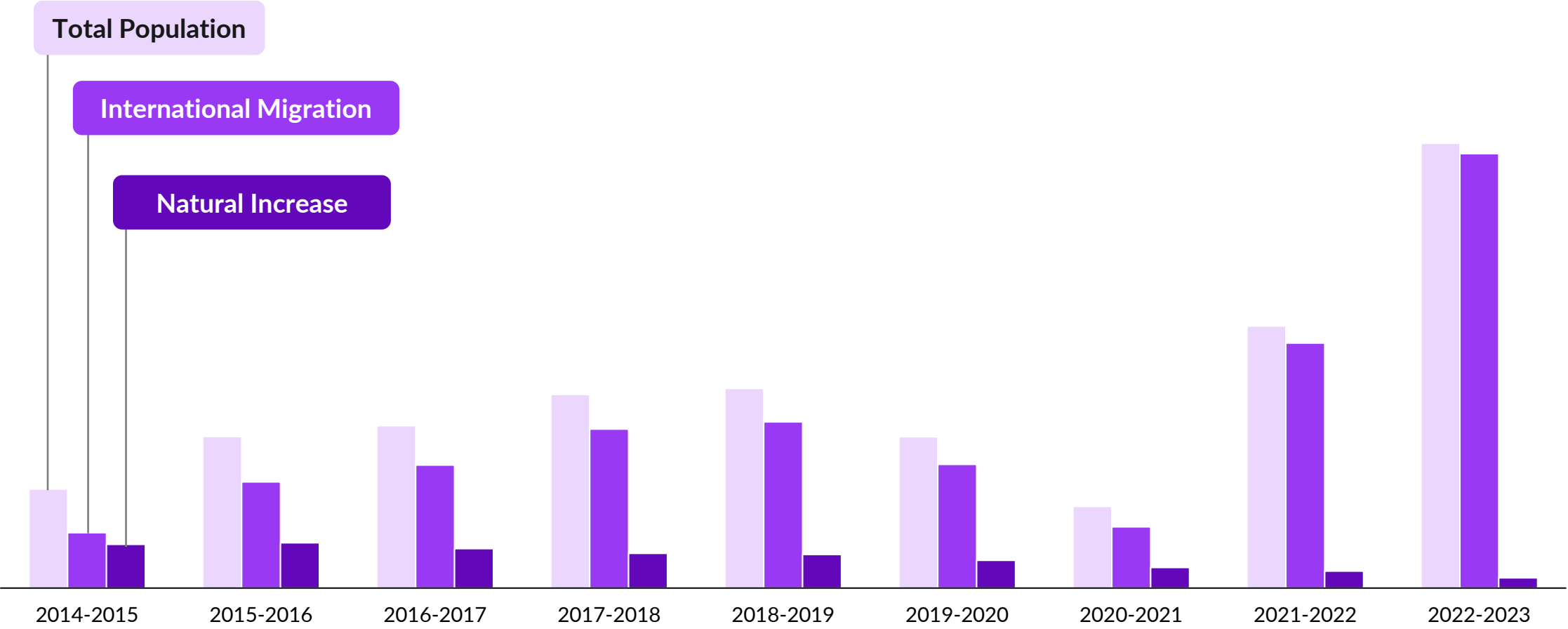
New Age of Maintainer breaks

Canadian Working Age Generation Mix Evening Out



Key for Planners and Marketers

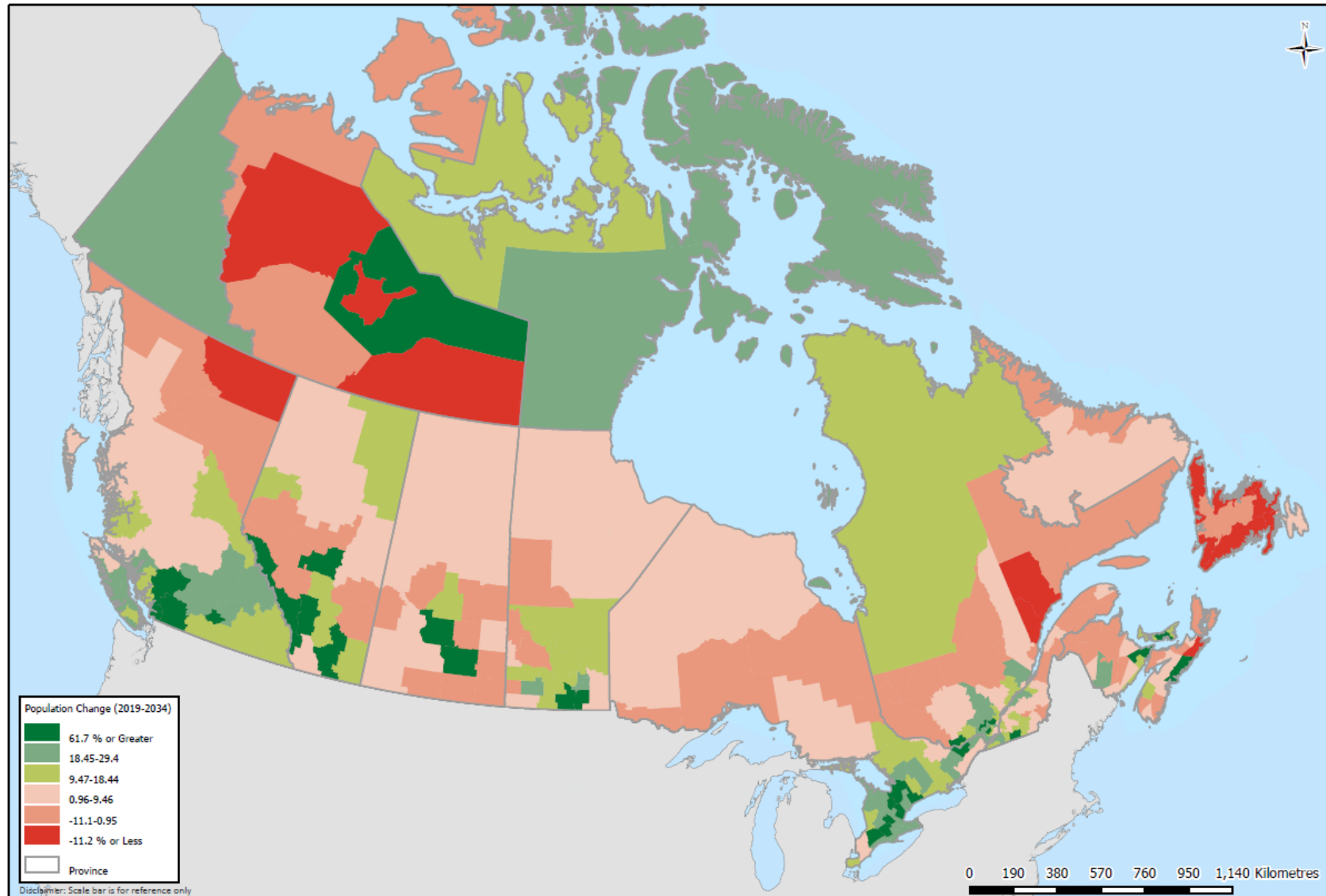
Immigration a Key Contributor to Canada's Population Growth



By 2034, Immigrants will Comprise Nearly One-third of Canada's Population, Increasing by 39%



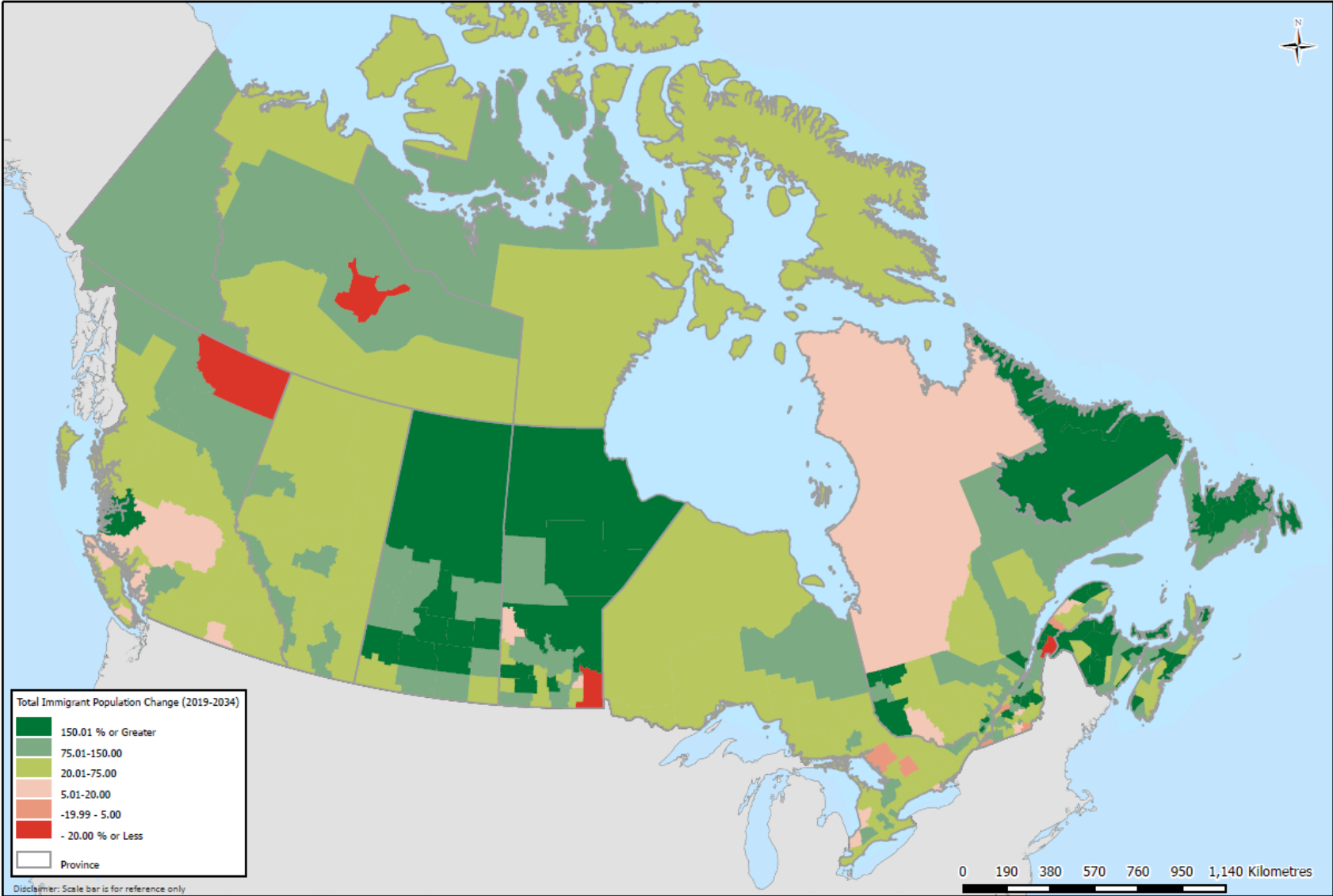
Urban Areas will Drive Population Growth, while Rural Regions will Decline



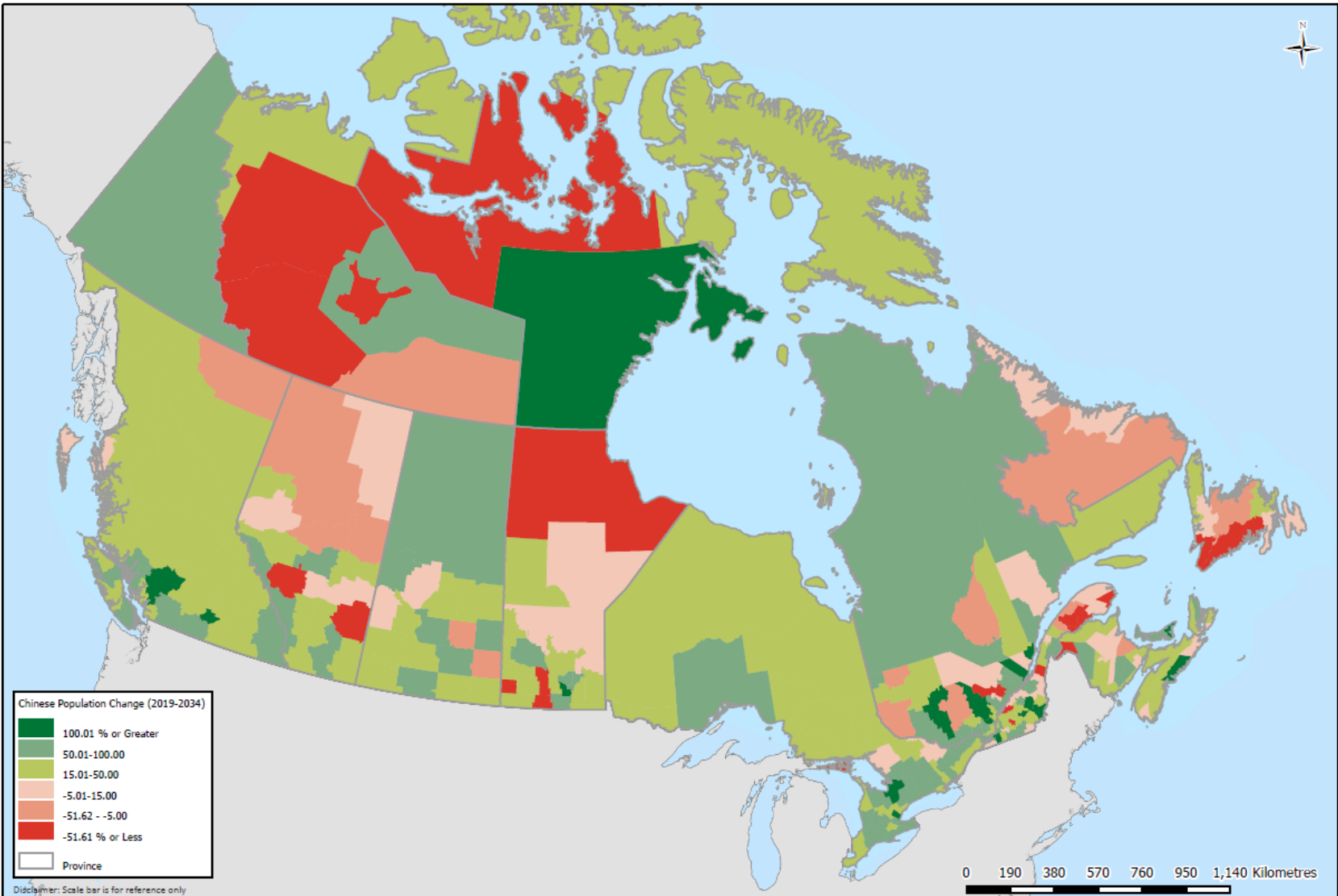
Canada by Census Division

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Immigration Growth is Evident in both Urban and Rural Areas



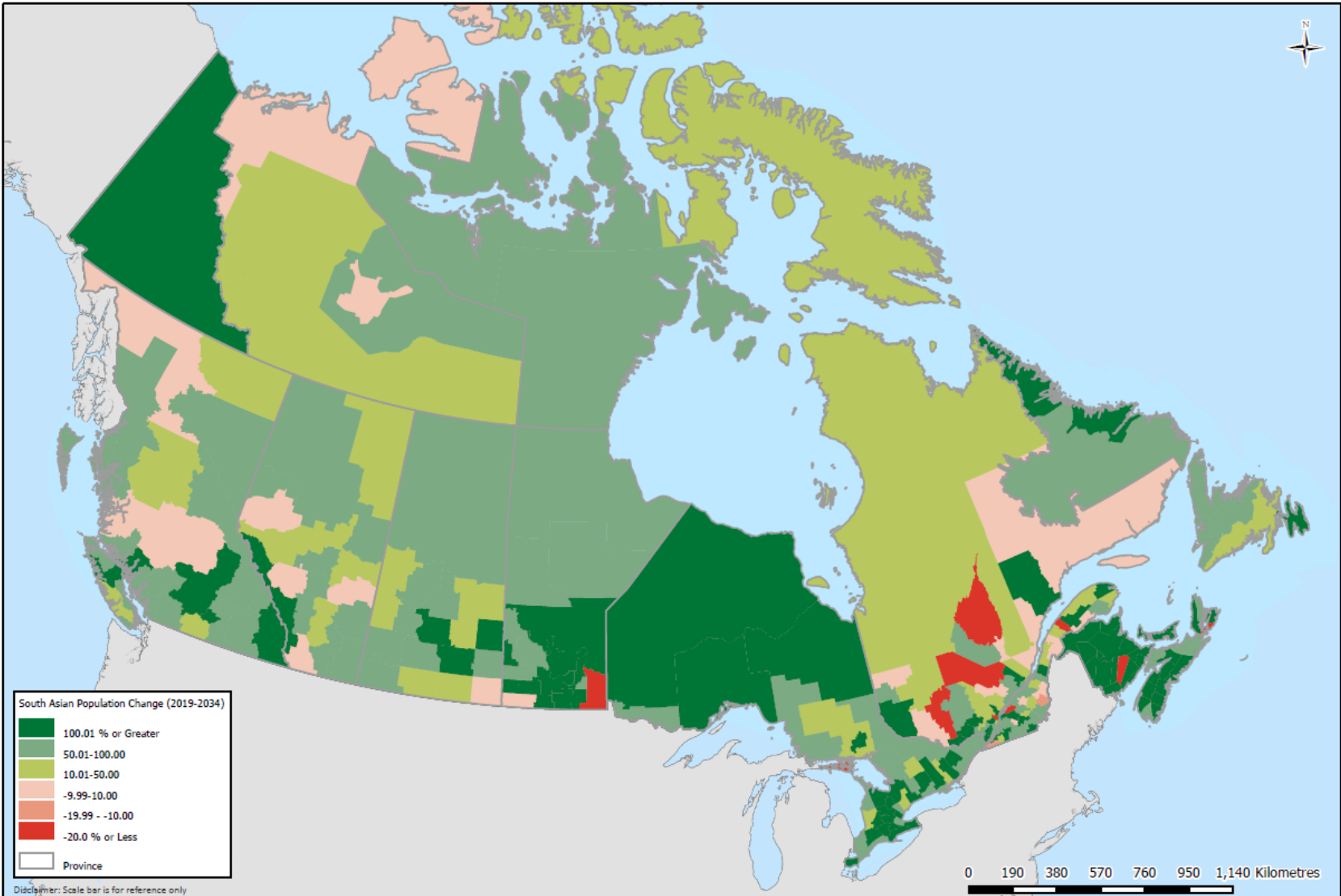
Chinese Immigrants Expected to Settle at Highest Rates in BC and ONT



Canada by Census Division

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South Asian Immigrants are Projected to Grow Strongly Across Canada

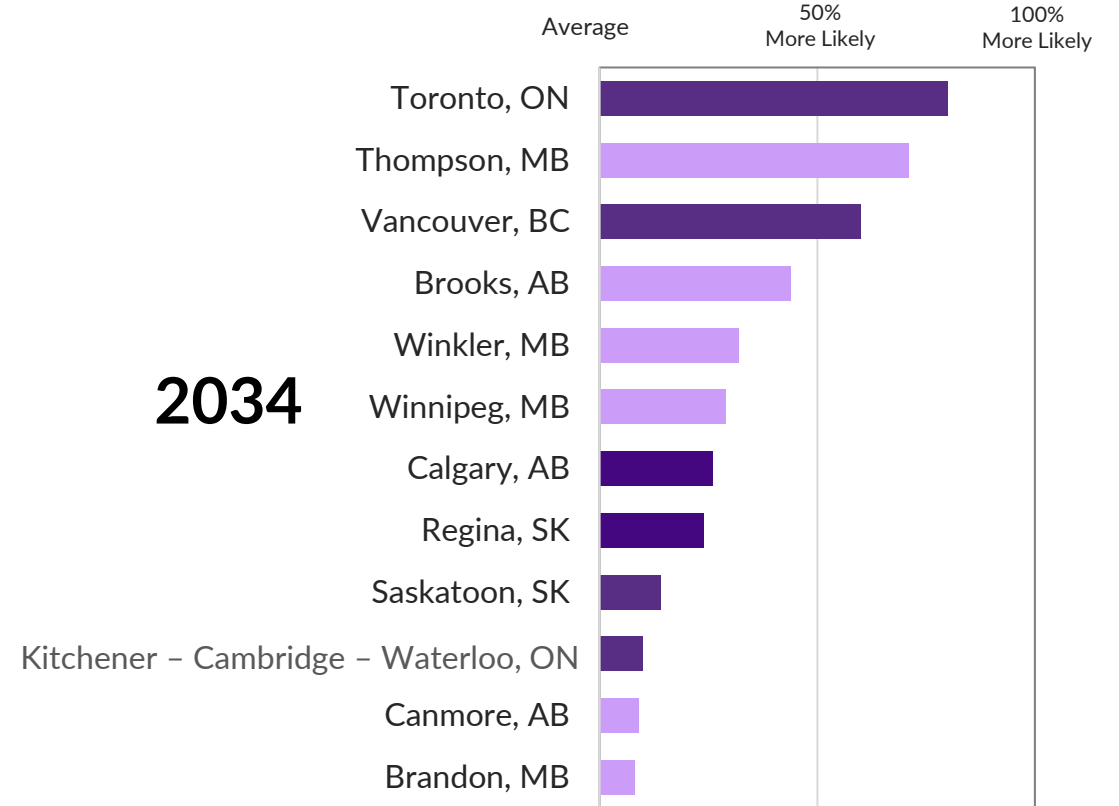
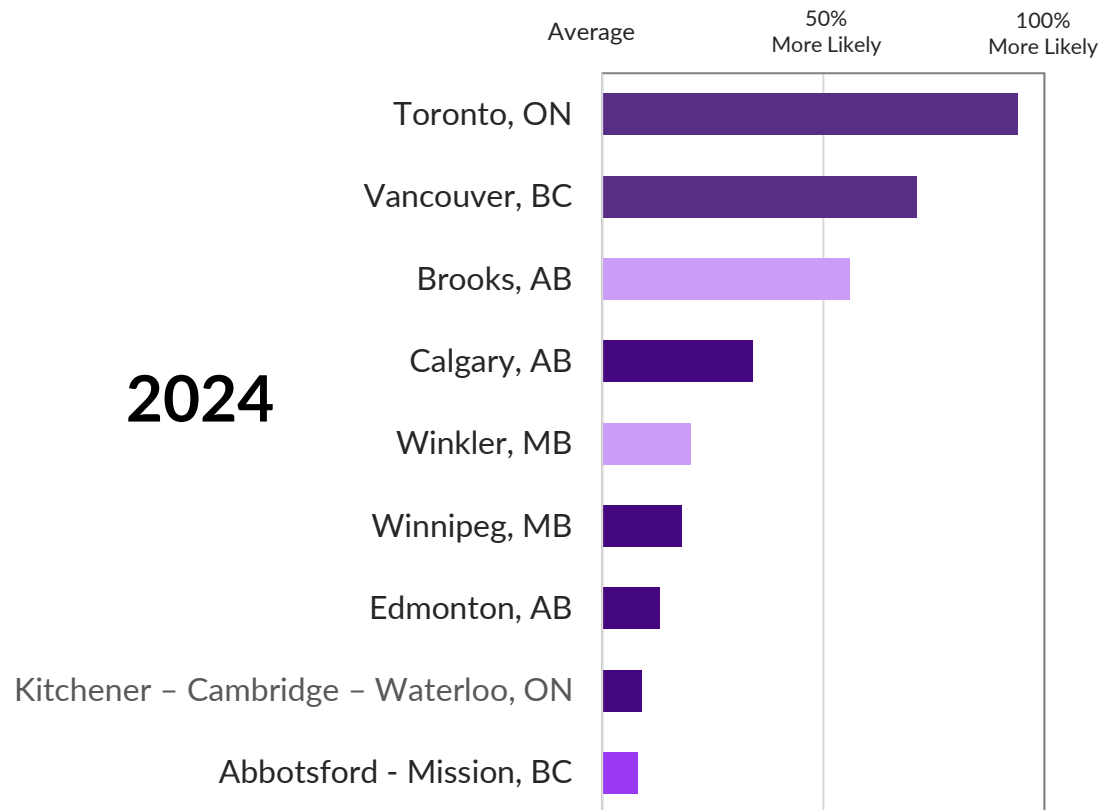


Canada by Census Division

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Immigration Shifts to Smaller Cities in the Next Decade

Likelihood of finding immigrant households by city



PRIZM®

Geodemographic Segmentation System

ENVIRONICS
ANALYTICS

Classification of Canadian Neighbourhoods – 67 Unique Segments

"Birds of a feather
flock together"

Annually updated
to account for changes in demographic
and socio-economic trends

DemoStats & Social
Values are **Key Inputs**

Socio Economic Status
Indicator (SESI)



Segment Name

Segment Picture

Social Group

Lifestage Group

Younger and middle-aged,
high-income city dwellers

PRIZM® Percent of Households Change from 2023-2024



A-List segment household income increased by **27%**

Very wealthy cosmopolitan families and couples

fastest-growing segments



Middle-aged, middle-income families, predominantly of South Asian descent

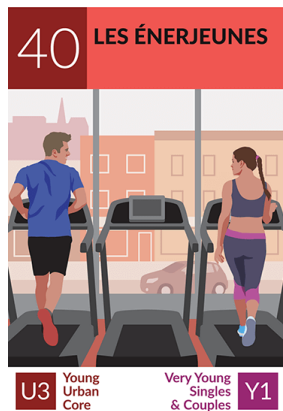


Younger and middle-aged urban singles and couples



Urban, upper-middle-income families, predominantly of South Asian descent

segments with greatest geographic change*



Young, lower-middle-income urban Quebec singles



Younger urban singles with high levels of university degrees



Older, low-income Quebec urban singles

segments in decline



Middle-aged high-income suburbanites



Middle-income town homeowners



Culturally diverse, Quebec-centred city dwellers

From Research to Activation with PRIZM®

Identify Target Segments/Audiences

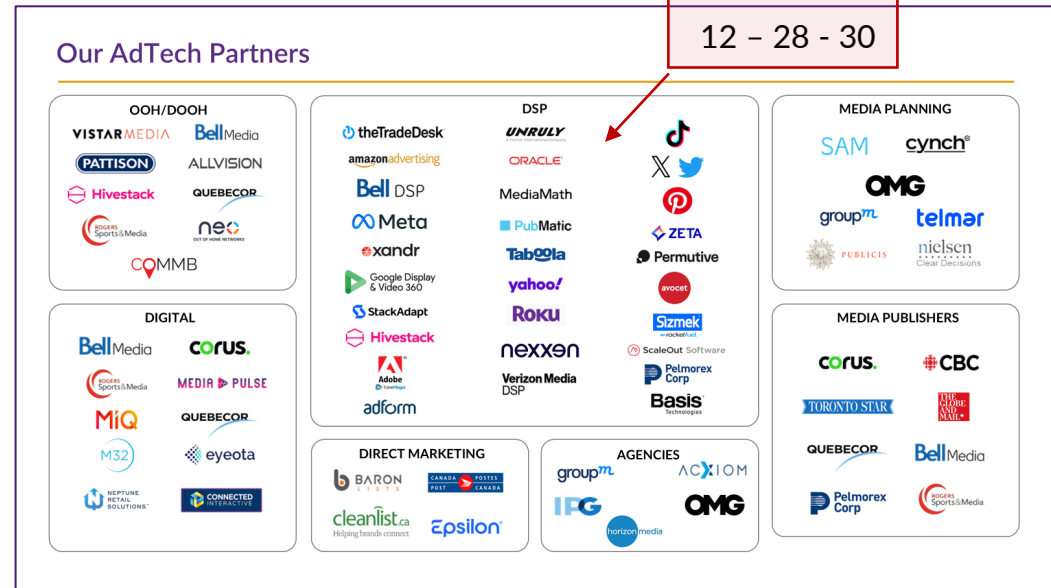


Build Understanding

PRIZM® is the cornerstone of data to help understand groups of people (consumers, residents, donors, members, etc.)

1. Profiling geographic areas to compare demand
2. Understand Canadians for better precision targeting
3. Help create successful engagement strategies
4. Assists with media planning and execution

Activate directly with PRIZM® segments/audiences with EA Partner DSPs



Activate w/PRIZM® on Social Media platforms through Eyeota



Newcomers to Canada Setting in a Variety of Neighbourhoods

12 EAT, PLAY, LOVE

U3 Young Urban Core **Y1** Very Young Singles & Couples

Younger urban singles with high levels of university degrees

28 LATTE LIFE

U5 Younger Urban Mix **Y1** Very Young Singles & Couples

Younger, single urban renters

47 SOCIAL NETWORKERS

U3 Young Urban Core **Y1** Very Young Singles & Couples

Young, culturally diverse singles in city apartments

52 FRIENDS & ROOMIES

U5 Younger Urban Mix **Y2** Younger Singles & Couples

Young, culturally diverse lower-middle-income city dwellers

55 ENCLAVES MULTIETHNIQUES

U3 Young Urban Core **F1** School-Age Families

Culturally diverse, low-income city singles and families

20 NEW ASIAN HEIGHTS

F2 Diverse Urban Fringe **Y2** Younger Singles & Couples

Younger singles and couples with high levels of university degrees, primarily of Asian descent

30 SOUTH ASIAN SOCIETY

F3 Middle-Income Urban Fringe **F2** Large Diverse Families

Middle-aged, middle-income families, predominantly of South Asian descent

32 DIVERSE & DETERMINED

F3 Middle-Income Urban Fringe **F1** School-Age Families

Middle-income, younger and middle-aged city dwellers

11 MODERN SUBURBIA

S2 High-Income Suburban Diversity **Y3** Young Families

Multi-ethnic younger and middle-aged suburbanites

Urban

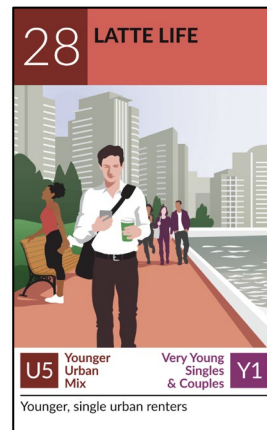
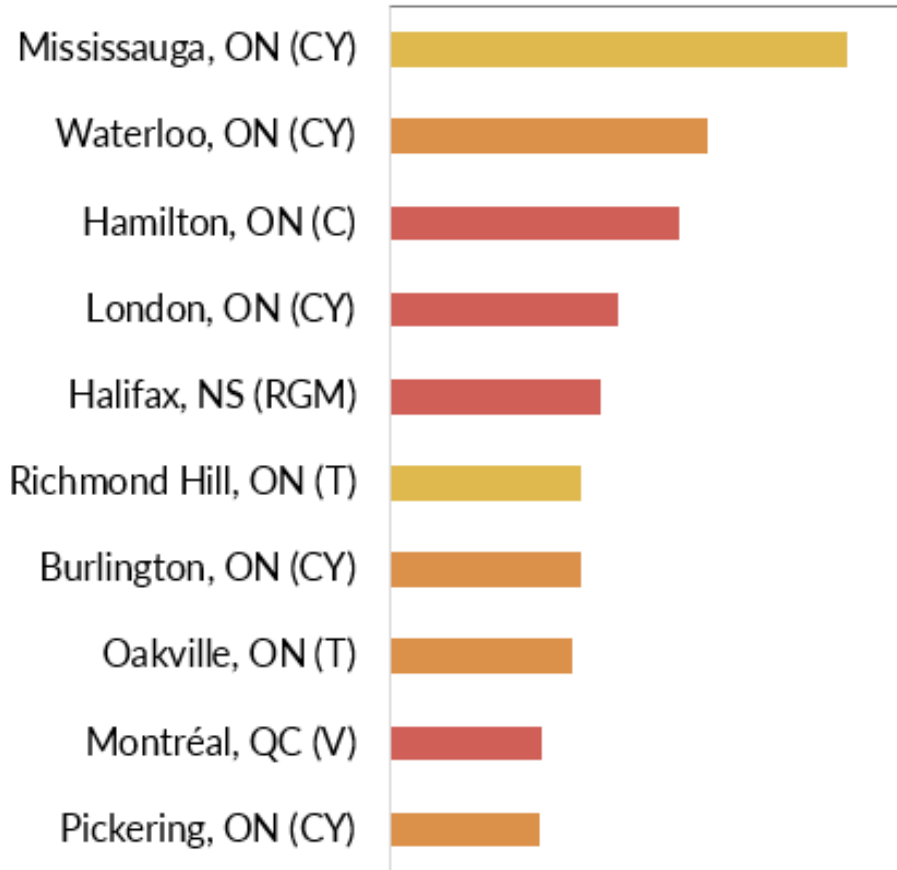
Urban Fringe

Suburban

Urbanity and Provincial Shifts Among Mobile Young Households

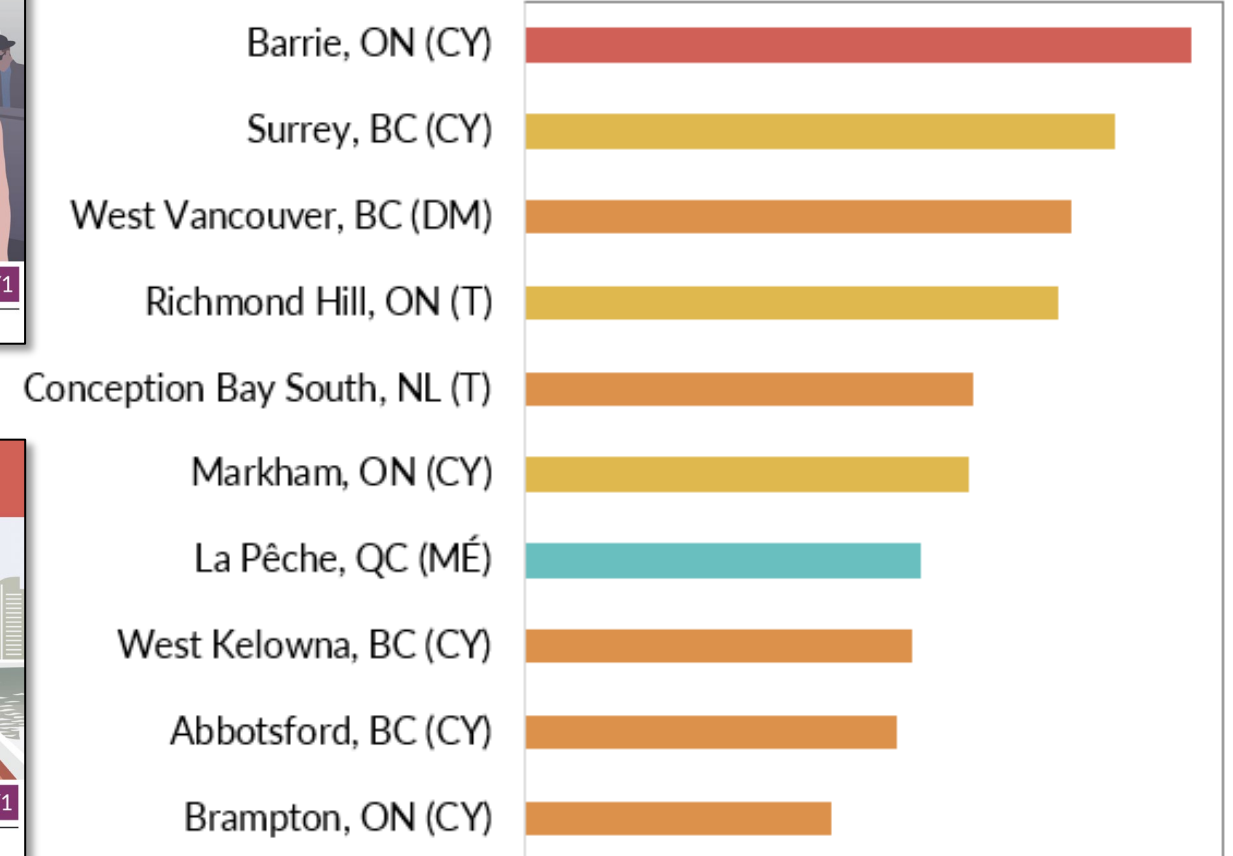
from Toronto to...

Census Subdivisions sorted by volume of movers - 2024



from Vancouver to...

Census Subdivisions sorted by volume of movers - 2024



SocialValues

Canadian values and attitudes

Understanding Motivations and Values

Social Values

survey conducted by
Environics Research

10,000 respondents over,
measuring **261 values and
attributes**

3 new trend variables

Apocalyptic Anxiety
Authoritarian Impulse
and Post-Materialist Mindsets

Determining **best message**
and **visual cues**

Compare and Contrast Key Segments to Tailor Messaging

32 DIVERSE & DETERMINED

12 EAT, PLAY, LOVE

Status Driven

Traditional Families

Consumptive

Trust in Ads

Skeptical of small businesses



Enthusiastic about Technology

Influential

Aesthetic

Brand Genuineness

Community Involvement

Less Price Sensitive

National Pride

Novelty

Cultural Sampling



Driven by Emotion

Experiential

Progressive

Open-Minded

Eco-Conscious

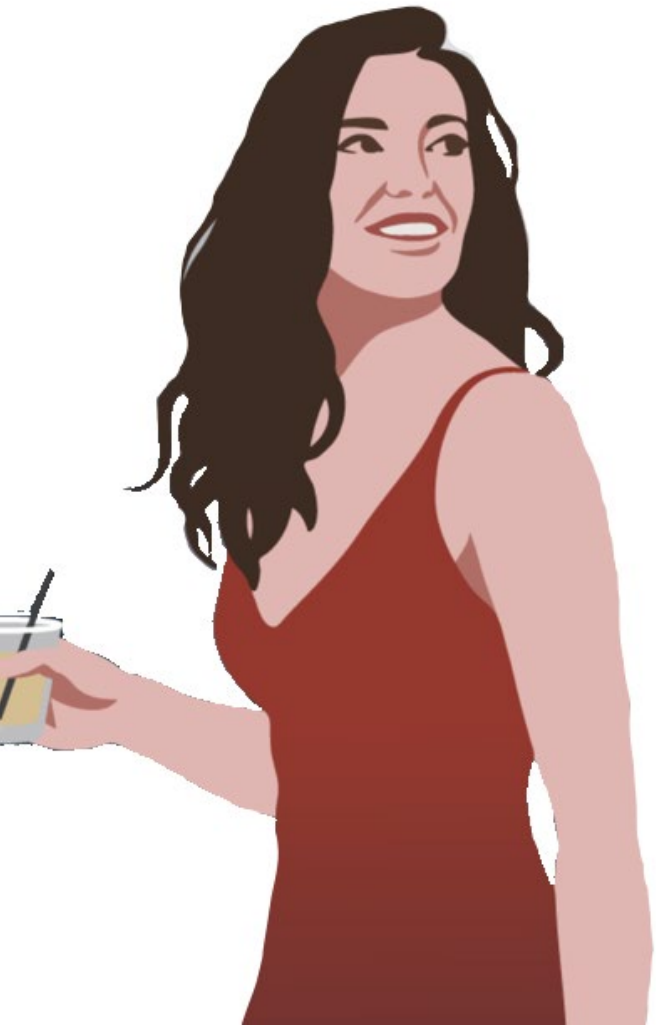
Brand-Driven

Impulsive

Low Obedience to Authority

Worried about Society's Future, Prefer Experiences over Materialism

12 EAT, PLAY, LOVE



Very High

Post-Materialist Mindsets

A mindset that values **freedom**, creativity and **personal expression**; favouring rich **experiences** over materialism and excited about where the world is going

High

Apocalyptic Anxiety

Belief that society will undergo **profound upheaval** in the future, viewing these **changes with anxiety**

Low

Authoritarian Impulse

A desire for **stability and security** in the face of societal changes, preference for **traditional values** and established norms, desire for order and **apprehensive about rapid social changes**

Key Takeaways

DemoStats: Our current year, privacy-compliant, comprehensive demographic data product. This year, shifts in immigration, generational balance, and Canadian settlement choices are more crucial than ever for marketers and planners across all sectors.

PRIZM: A Canadian segmentation system that integrates behavioral data with demographics and psychographics, facilitating both activation and measurement.

Social Values: These impact the success of campaigns based on visuals and messaging. Real-time measurement can support programmatic campaigns.

EA Data: It all starts and ends with data. Our data products work together to help you activate and unlock potential.

Questions?

Upcoming Events at EA



Coming up: 18th Annual User Conference – Wednesday, September 18th

Stay tuned for future webinars!