BRANDZ TOP 40 most valuable canadian brands 2019
BRANDZ™ TOP 40 MOST VALUABLE CANADIAN BRANDS 2019

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Sincerely,

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Inaugural ranking shows the power of Canadian banks.

It gives me great pleasure to welcome Canada to the BrandZ™ family of rankings. This year, we find many countries and businesses undergoing a period of considerable volatility and uncertainty—which Canada has largely managed to avoid. As a result, its brands inhabit one of the most politically stable and socially welcoming economies in the world today.

Canada is home to some of the strongest banks and most unique brands you can find anywhere. People around the world are familiar with financial giants like RBC and TD Bank. Consumers, especially in major cities, are gaining exposure to some of the country’s more iconic and adventurous brands, like Canada Goose, Lululemon, and Tim Hortons. Other Canadian brands, like Canadian Tire and Shoppers Drug Mart, may be less well known internationally but are beloved institutions in the country.

Overall, Canada’s Top 40 brands have a value of $144 billion in 2019. Adjusted for GDP, they are worth slightly above average when compared to other markets and contribute a considerable amount to the businesses that own them. What drives their value? The answer is the same as in many other countries: Meaning and Difference are key factors separating the good from the great brands.

But whether you’re a global or local brand, this report contains knowledge and insights to help you find growth in challenging times. Our Cross Category Themes, for example, highlight strategies that marketers can use to reach a rapidly changing customer base in the country. The Key Takeaways provide succinct, action-oriented recommendations for brands, based on our expert analysis of the market. And the Thought Leadership section of this report offers expert insights and strategies for reaching Canadian consumers. To highlight two of the articles, Scott Megginson uses a research-driven approach to explain how to reach women effectively in Canadian advertising, while Amy Badun gives us an uplifting look at Canada’s newfound confidence on the international stage.

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Canadian brands join the BrandZ™ rankings

WELCOME

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Introduction
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Our proprietary BrandZ™ brand valuation methodology makes the Top 40 Most Valuable Canadian Brands 2019 the definitive study of brands in the country. The uniquely consumer-facing BrandZ™ methodology combines extensive and on-going consumer research with rigorous financial analysis. (See page 96 for full methodology.)

We gathered brand perceptions from consumers across the global market and asked about brands with all kinds of ownership structures: individual private brands, family-owned conglomerates, and MNCs (Multinational Corporations). We selected brands that met our qualifying criteria: that the brand was originally created by a Canadian enterprise; and that the brand is either owned by a publicly traded enterprise or that its financials are published in the public domain. This approach produced a carefully conceived ranking of brands in 11 consumer-facing categories, including cars, banks, apparel, technology, and entertainment.

To learn more about the BrandZ™ valuation methodology, please contact:

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On the brink of international stardom

Welcome to the inaugural edition of the BrandZ™ Top 40 Canadian Brands. Canada’s entry in the BrandZ™ family of rankings is perhaps the smallest step it has recently taken in raising its profile around the world.

In recent years Canada has found itself unexpectedly thrust into a leadership position on the world stage. As many countries have retreated into nationalism and division, the country has remained politically stable and stayed strongly behind its pluralistic values, generous social welfare system, and embrace of immigration. It is emerging as a vocal and confident leader, with a voice generally of moderation and tolerance in an era in which such a stance often struggles to gain a share of the conversation. As President Obama famously declared, the world needs more Canada.

One reason is that while xenophobia can easily sweep into power in other countries, multiculturalism has long been a part of the fabric of Canadian life. In addition, many of the issues causing social upheaval elsewhere have largely left Canada unscathed. For example, the country has a well-regulated financial sector that kept it largely immune to the financial crises of the past decade—a fact reflected in the strong showing of its banks in this year’s BrandZ™ research.

As a result, more and more countries are looking to Canada and listening to what it has to say. For example, in this BAV Best Countries Report, an annual survey that polls international opinions on different nations, Canada sits at third globally, with a reputation behind only that of Japan and Switzerland. People around the world rate it highly on measures like trust, citizenship, and transparency. It also ranks at the very top of places others would like to live, a reflection of its reputation for safety, security, and family life. In a world filled with uncertainty and turmoil, Canada looks better every day.
However, context. One major factor affecting the health of top brands in Canada is their categories. The Canadian rankings are dominated by two sectors: banking and telecom providers, which account for more than two thirds of the total brand value. Banking by its nature is a largely undifferentiated space, and while Canadians hold their banks in high regard by comparison to other nations, they are still banks.

If banks are generally seen as good, telecom providers are an entirely different matter. Canada has heavy restrictions on foreign ownership of its telecommunications sector. As a result, local providers often have little competition. This has left Canada with high data rates, especially when compared to its southern neighbour, and new “unlimited” data plans that have what any reasonable person would consider limits. Thanks to these and other annoyances, Canadians have little love for their telecom providers, which drags down the overall health of their top brands.

The most important consideration, however, may be the Canadian consumer. Put frankly, they are a tough crowd. Unlike people in most countries, Canadians do not consider income or possessions, including brands, to be status symbols. According to Kantar’s Canada Monitor, only 31 percent of Canadians buy brands to show how successful they are. They are also highly practical shoppers by global standards. Eighty-six percent of them are always on the lookout for sales, a 13 point increase over global averages, while 67 percent say that price is more important than brand name.

Canadian consumers also lag their global counterparts considerably in receptivity to advertising, which is a central part of brand building. According to Kantar’s AdReaction, globally 50 percent of TV audiences view ads as very or somewhat positive. In Canada, the number is 37 percent. And it doesn’t get any better from there. When it comes to mobile digital ads, only 17 percent of Canadians are receptive vs. 28 percent globally. In social media, it’s 26 percent vs. 33 percent.

While brand managers may not like this, it does go a long way to explaining why top Canadian brands score poorly on a range of metrics relative to their global counterparts—and why we should probably view their metrics on a relative rather than absolute basis. That said, it doesn’t seem fair to fault a nation for its lack of materialism and generally healthy attitude towards possessions. Canadians may be a psychologist’s dream, but they can be a challenge for marketers. As a result, great brands must work extra hard to provide unique and consistent value over their competitors.

Breakout on the horizon?

What happens next? For some brands, the future seems especially bright. Since the fall of BlackBerry, Canadian brands (excepting banks) have largely stayed inside the country’s borders. Many of the names in the Top 40 ranking are likely to be unfamiliar to those outside the country. However, that may be about to change. Several brands—Tim Hortons, Lululemon, Aritzia, and Canada Goose, among them—are setting their sights on the wider world. If so, they’ll likely be able to lean into the country’s excellent reputation as they venture abroad.

With this potential development and the low Meaningful Difference of several top brands, the Canadian BrandZ™ rankings will likely prove volatile and unpredictable in the coming years. With the country’s southern neighbour going through a bout of unrest—and the rest of the world not far behind—Canada will likely remain its sane and happy self, but its brands won’t be able to completely control their destinies. Volatility is always a challenge, and Canada’s brands will have to work hard to stay on top of it. For now, though, the country is enjoying a new and hopefully enduring moment on the international stage. Because no matter your perspective, the world could probably use a lot more Canada.
The combined value of the BrandZ™ Top 40 Most Valuable Canadian Brands 2019 is US$143.6 billion. Its brands, when compared to other valuation countries, are roughly average in value, though ahead of similarly sized European economies, like Spain and Italy. And when normalized for GDP, Canada’s top brands are slightly above average.

RBC the top brand, with TD Bank at its heels
The two most valuable Canadian brands by a considerable margin are RBC and TD Bank. At $23 billion and $20 billion respectively, they stand far ahead of third place Bell, which is the only other Canadian brand with a value greater than $10 billion.

Canadian banks are highly unusual in that they derive a substantial proportion of their value—a ratio known as Brand Contribution—from their brands. RBC is not only the top brand in the rank by value, it and TD Bank are also in the top 10 for Brand Contribution. In particular, consumers see them as wise, assertive, and highly socially responsible.

Best to be a bank, and not a telecom provider
While Canadian consumers like their banks, the same could emphatically not be said about their telecom providers. The sector is highly regulated in Canada, and has little competition outside of the main geographies, a circumstance that businesses have not been reluctant to explore. While Canadian telecom providers have strong brand values due to their ubiquity and communications, they also top the indexes on less flattering measures, like arrogance (a category dominated by Rogers and Bell Canada), dishonesty (ditto, but add Telus), and uncaring (now add Shaw). Clearly, these brands have work to do if they want to win back customers’ love.

The risk of Salience
Canadian brands, on average, contribute just as much to their businesses as other global brands, but they do so in a somewhat lopsided way that carries both risks and opportunities. As mentioned in the overview, they do quite well on Salience. This is roughly how well known a brand is and how familiar people are with it. It is typically the result of a wide physical footprint or years of investment in advertising.

Top Canadian brands are highly salient. Everyone in Canada, for example, is aware of TD Bank or Molson Canadian, which enjoy virtually universal recognition. No one needs to be reminded of what Labatt is or where to find a Dollarama.

Salience is quite important in making customers aware of what a brand is, what it stands for, and what it sells. And herein lies the rub. A second, more telling measure of longer-term success is Meaningful Difference. This looks at how a brand meets a customer’s needs and if it does so in a unique way.

Put simply, Meaningfully Different brands offer something consumers want and can’t get anywhere else. As a result, they tend to grow faster when times are good and are resilient under stress. After recessions, they are also quicker to recover and return to growth.

However, in general, the average top Canadian brand fares poorly by this measure. They tend to trade on their fame and high profiles, rather than their ability to offer something unique. Canadians are especially reluctant to find their brands different. Partly this reflects the dominant categories in the rankings—banks, telecom providers, and retail—but that doesn’t explain everything. Canadian brands also rank rather low on average in metrics like creativity, Innovation, and Experience—factors that work to set brands apart.

Depending on how you see a glass filled to the midpoint with water, this is either a major risk or a big opportunity. High Salience and low Difference have historically marked out brands that are ripe for disruption. Building your brand solely on advertising may make you top of mind, but it doesn’t make you something that can’t be found elsewhere. If a new kid comes along with a better offering, you’ll have to scramble to stay relevant. This is likely why CIBC and Scotiabank have launched two of the most distinct Canadian brands in Tangerine and Simpli Financial, respectively. These moves to protect the banks’ flanks from digital upstarts are certainly smart.
Meaningful Difference boosts brands

While top Canadian brands in general lack Meaningful Difference, some of them score extremely well on the measure. On average, Meaningfully Different brands are 46 percent more valuable than those who trail on this measure.

Establishing Meaningful Difference fuels brand value in Canada

Who are the Meaningfully Different brands? They tend to be Canada’s most exciting brands, ones that everyone knows, like Tim Hortons, Cineplex, and Lululemon. Interestingly, many of them set themselves apart by their identification with their home country. Four of the top ten, for example, have the word Canada in their names. Others, like Tim Hortons and Shoppers Drug Mart, are Canadian institutions.

They also show that Meaningful Difference is not a commodity nor a formula. The best brands by this measure come from nearly every category, from telecoms and retail to airlines and fast food. Everyone, it seems has the possibility of building Meaningful Difference, it’s just a matter of being creative and finding an opportunity.

The power of two

Another driver of value in Canada is Purpose. Seven of the top ten brands for Meaningful Difference also make the top ten for Purpose. And Top 40 brands that have a clear purpose in customers’ minds (this latter part is important since people have to know your purpose for it to matter) have 78 percent higher brand value than those that don’t.

We can see the value of Purpose for Canadian Tire, which leads the Top 40 by this metric. For those who have never visited the country, the brand is as uniquely Canadian as it gets. Its stores contain a variety of goods ranging from garden supplies to hardware and recreation—all of which are uniquely suited to the Canadian environment. At the same time, the brand is closely aligned with the country’s national pastime, hockey. It sells equipment, sponsors professional teams, and even provides a Jumpstart program that helps disadvantaged youth play what can be a quite expensive sport. This sense of Difference together with Purpose makes the brand among the country’s best known and healthiest.
Top 5 learnings for marketers

1. Go Canada
There’s an inescapable conclusion that Canadians like brands that strongly identify with their home market. Nine out of the Top 40 brands reference the word “Canada,” and several others allude to it. According to Canada Monitor, 61 percent of Canadians prefer to buy things made in their own country. And unlike some of its top brands, Canada is a decidedly different place, and if marketers are looking for a way to stand out in its consumers’ minds, they could do worse than cozy up to their home country.

2. Do, don’t say
Canadian brands derive a substantial amount of their value by their communications. While brave in their advertising, they shouldn’t rest on their laurels. Canadian brands do not stand out for the kinds of creativity and innovation that create a real difference that leads to premium pricing. And so, the path forward involves getting inventive, finding areas to create unique offerings that set brands apart and ward off future threats.

3. Lead with purpose
BrandZ™ research defines Purpose as making people’s lives better in some way. Canadian brands are definitely seen as leaders in the marketplace, and those that lean into their purpose will resonate with consumers. That will not simply mean doing what you do even better, improving service, or innovating digitally to bring more value to your customers. But it’s important that that Purpose extend from your brand whenever possible. Everyone wants to save polar bears, but that’s a much more natural fit for an outdoors company than a shoe polish. Authenticity sells.

4. CX is always a good idea
Brands globally are succeeding with strategies that remove pain points in customer journeys. Canadian brands by and large lag their global counterparts in experience, which looks at the total customer journey. Canadians tend to consider consumers, taking time to make a purchasing decision. Anything that can make their choices clearer would definitely be welcome. This is an area where digital innovation is especially relevant.

5. Lean into pluralism
One of the paradoxes of Canadian brands is that while they don’t always seem different, they exist in a society defined by the many different kinds of people inhabiting it. Canada has long been multicultural side by side as a de facto. Celebrating difference is certainly a way to be different and might provide an avenue for brands looking for ways to stand out.

Cross Category Trends

1. Poly want a culture
One of the least understood aspects of Canadian life outside the country is its multiculturalism. Multiculturalism is enshrined in Canadian law, celebrated across all walks of life, and a vital factor in population growth and sustaining social services for an aging workforce. Immigrants in Canada come from more than 100 countries, making it host to one of the most unique populations on earth.

Ask Canadians to describe this situation, and you’ll often hear them talk of a mosaic, or a set of distinct cultural points making up a whole. As a result, to reach consumers in the country, brands have traditionally used so-called “total market” strategies, seeking out commonalities between all Canadians and speaking to them. But Kantar’s Canada Monitor has found that this somewhat lazy strategy may be becoming less effective.

That’s because Canada is seeing an ongoing shift from a multicultural society to a polycultural one. The difference may seem one of semantics, but it does matter. Unlike a mosaic, a polycultural society is much more like the US, where different cultural groups have enough critical mass to assert influence on one another.

In other words, the country is starting to see groups with distinct identities emerge that are now affecting one another in uniquely Canadian ways. This is an important consideration for brand marketers, who now have to consider marketing to people of different cultural origins—rather than assuming a common understanding on all things. With increasingly precise data targeting, as well as the ability to create and speak to a wider range of segments, brand looking to increase Salience and Meaning may want to start thinking about the unique and uniquely shared interests of their audiences, rather than what they all have in common.

2. Not at your service
The Top 40 Canadian brands are just as interesting for what they’re not than what they are. They do not include, for example, a single technology company or manufacturer. Except for two beers and a whisky, there are no FMCG brands. It’s not that Canada doesn’t build anything or produce consumer goods—in fact it has significant automotive and aircraft manufacturing—but it tends to do the bulk of it in the B2B sector or in the service of companies from the US and elsewhere.

That said, nearly all of the top brands have one thing in common: they provide customer service. Services, in fact, account for more than 70 percent of the nation’s economy (estimates vary), much more than its lumber, mining, energy, and agricultural sectors combined.

So, how do most top Canadian brands do with customer service? By one BrandZ™ metric, most could do better. Only six of the top 40 Canadian brands score highly for Experience: Cineplex, Canadian Tire, Air Canada, Canada Goose, Shoppers Drug Mart, and Petro-Canada. These brands should also be no surprise to residents of the county. Canadian consumers can hardly spend any time in a Shoppers Drug Mart without experiencing great service. And Cineplex certainly keeps its customers entertained.

The rest of Canada’s top brands have a clear opportunity to build value by improving the service and experience they provide. This should not be hard. Canadians are renowned for their friendliness, which is inexpensive and can go a long way to making happier customers. Innovation is also a proven way globally to improve customer experience, not least when it serves to make better products or remove pain points in the purchasing process. As Canada’s brands become increasingly digital and e-commerce more common, this metric will be an interesting one to watch.
Section 1: Introduction

3 North American does not mean American

Driving from the US to Canada can be an exercise in déjà vu. While there are differences—Canada is safer, emptier, and more urbanized overall—the same kinds of neighbourhoods, strip malls, road markings, chain restaurants, and gas station convenience stores are found on both sides of the border. However, the same cannot be said of attitudes, and especially attitudes towards advertising. There has long been a tradition of advertisers in English Canada to simply import big budget American ads, add a “u” to the relevant words, and declare victory. However, a recent study by Kantar found that there is little correlation between success in one market and another. When moving from one country to the next, a third of TV ads do not fall into the same tertile for effectiveness and only half fall into the same tertile for enjoyment (a key driver of effectiveness).

What’s driving the difference? A range of factors, including clutter, the types of ads, how consumers view different categories, and the different statuses of brands in the two countries. People in the US are also much more likely to judge themselves successful by the amount of money they make or buy a product to reflect their status. But the biggest differences may be cultural. Canadians, for example, are far more egalitarian when it comes to gender roles in household decision making, a key factor for advertisers. Ninety percent of both males and females say they take part in household purchasing decisions. As a result, the typical US ad which shows Mom discussing paper towels while Dad is out golfing tends to fall flat.

It’s not that you can’t create an ad that serves both markets equally well, but a more nuanced approach is probably a better bet for most brands.

Section 2: A risk-adverse land

Canadians enjoy a reputation as one of the safer countries in the world, but they are also among the most risk adverse of people. On a variety of metrics, Canadians over-index on stay-at-home activities like cooking and under-index of everything from going to the movies to going out to play sports. Sixty-eight percent of Canadians say they would rather play it safe than take a risk—a 14 point jump over global averages.

What are they concerned about? The environment is a big one, with 69 percent concerned about pollution. Partly this reflects the effects of global warming, which has increased forest fires in the western provinces, bringing smoke into cities at an alarming pace. Sixty-seven percent are also worried about the economy, no surprise there, and 66 percent are increasingly concerned about the use of their personal data.

As we’ve seen elsewhere in this report, this tendency has a dampening effect on brands, as Canadians tend to shop more for discounts and are less interested in labels than values. Still, brands that focus on helping these risk adverse consumers feel comfortable in their homes may have the best chance at success.

5 Disconnecting from digital

As Hal Varian of Google has noted, innovation often sees rapid adoption followed by a period of retrenchment and disillusionment. To illustrate that point, he uses the example of the typewriter. Early on, cars were simply the new wonder, but over time people realized that they came with significant downsides as well, like pollution, accidents, and so on.

Like many global consumers, Canadians leaped onto the e-commerce bandwagon, but they are now increasingly concerned about the time they are spending on devices, annoyed at the intrusive ads that seem to follow them around, and worried that so much of their data is out there for thieves to pounce on. For example, in 2012 only 42 percent of Canadians were concerned about protecting their privacy, in 2018, that number rose to 57 percent. Sixty-nine percent say that being able to unplug from technology is a sign of success and accomplishment. And in an interesting development, the government of Ontario has moved to ban cell phones in classrooms this year.

In Canada as elsewhere, it’s become increasingly clear that the future is not purely digital. As a result, brands today need to consider not just their online audience but also their offline audience. Canada Monitor data shows that consumers are still looking for authentic experiences. They want to be able to see, hear, feel, and taste your brand in a way that connects to your unique value proposition. Brandz™ data shows that those brands that rank highly for experience, like West Jet, Cineplex, and Canadian Tire, are enabling their customers to explore the world in new ways.

So, while Canadians are becoming more connected every day, it’s worth thinking about the ways you can pull them away from the screen and back into the real world they crave.

6 The millennial left behind

Over the past few years, Canada has experienced a boom in some of the major areas: real estate and education. In the media, this has created winners and losers, with the largest group of buyers in the country having simply been millennials. While Gen Xers and centennials have struggled with the housing and costs to be wealthy in paper, younger ages have thrust themselves behind the eight ball as they try to start families and build a comfortable life.

While popular opinion has them spending too much money on meals and kilo-infused smoothies, their challenges are real. By the numbers, millennials are starting at lower wages than previous generations, and those aren’t going up very quickly. Thanks to the cost of education, they have 360 percent more debt than their parents and are only half as likely to own a home as people their age in 1975. This has put a strain on their wallets that is causing them to be highly selective as consumers.

Above all, millennials are seeking control over their lives. For them, not spending money and controlling expenses is important. So, if your brand is seeking to market to them, you need to realize they have a save-first mentality—and they’re open to approaches that put them at ease. Humour is a broadly effective strategy in Canada—as is a good balance of value and pricing.
Key takeaways

1 Going somewhere?
While several Canadian brands have big overseas ambitions for 2020, BrandZ™ data shows that on average, the country’s top brands generate much less of their revenue outside their country than the most valuable brands in other markets. This may seem odd in a place with such substantial overseas trade, but Canada is unusual for a G7 country in how much of that trade is in primary products, like lumber and minerals. The top overseas brands by percentage of revenue? Crown Royal, Lululemon, Air Canada, Canada Goose, and Manulife. No surprises there but look for Tim Hortons and Aritzia to join the list soon.

2 No room to grow
The typical Top 40 brand in Canada scores extremely well in terms of Power but poorly in terms of Potential. In plain English, this means that these are large brands in their categories and command a considerable market share (although, this being Canada, it may be a regional share). As a result, they have little headroom to grow, unless they look for unusual opportunities to succeed. Top brands that want to increase their revenue need to find new markets or opportunities. Innovation may be their best chance to improve the situation.

3 Choosing media wisely
Canadians largely agree that campaigns today should be fully integrated, i.e. whatever appears on TV should be fully integrated, i.e. whatever appears on other media. It works best with Facebook, newspapers, and out of home. Radio, on the other hand, doesn’t integrate terribly well with other media, but it is effective on its own. The big takeaway? Working with local experts is always a good idea to get the most of your campaigns.

4 The practical consumer
Globally, more and more consumers are attracted to local, organic, and various stripes of healthy products. By a wide range of measures, Canadians lag global averages on such things. Only 49 percent seek out natural foods (vs. 66 percent globally), only 23 percent buy organic (vs. 35 percent elsewhere), and only 24 percent are interested in detoxifying (32 percent globally). They also don’t particularly care about whether they’re buying from small local companies or global brands. This may be surprising in such a highly urbanized country, but it can only be good news for larger brand marketers, who have struggled in other markets with smaller upstarts.

5 On target
Canadians face probably just as much personalized targeting and retargeting as consumers in other developed economies. However, two interesting trends emerge when asking them about their experiences with automated marketing. The first is that overall Canadians do not feel as targeted as people in other countries, and their reactions to it, both positive and negative, are less intense than global averages. That said, if you are attempting to catch people with the right message at the right time, it’s worth noting that Canadians are far more likely to remember a negative targeting experience than a positive and relevant one.

6 But not great at gendered ads
Globally the advertising world has a big disconnect when it comes to gender, with 76 percent of marketers thinking they’re getting TV ads directed at females right—and only 40 percent of women agreeing with them. Canadian women couldn’t agree more. While roughly 97 percent of all ads agree or strongly agree that they take part in grocery shopping, this has big implications for marketers, who have to take not one but two decision makers into account for any purchasing decision. Oddly, while the home is seen as highly egalitarian, the workplace is not. A surprising 46 percent of Canadian women say they’ve experienced discrimination at work.

7 A gender-equal society (mostly)
By and large, Canadian households are places where tasks are shared equally. Sixty-one percent of people report that they share childcare tasks, 46 percent claim an equal contribution to income, and nearly all say that they take part in grocery shopping. That is breeding new business opportunities, as a raft of new Canadian brands like Burb and Tokyo Smoke are blending cannabis with clothing, coffee, and other products.

8 But not great at gendered ads
Globally the advertising world has a big disconnect when it comes to gender, with 76 percent of marketers thinking they’re getting TV ads directed at females right—and only 40 percent of women agreeing with them. Canadian women couldn’t agree more. While roughly 97 percent of all ads in the country are directed either at women or both genders, females-poormine ads score worse than those featuring males or both genders. A reexamination of strategy and good data should start to help marketers replace wishful thinking with ads that actually work.

9 Integrated retail is coming to Canada
Brick-and-mortar retail is not dead in Canada. It has transformed to become more enjoyable, streamlined, and digitally integrated. Canadians are bargain hunters and reward retailers who offer great value and shopping experience. Brands need to optimize their digital and physical presence to find growth in the omnichannel era or risk being left out.

10 Living in the moment, Quebecois style
It’s fitting that the phrase “joi de vivre” is in French. Because an astonishing 58 percent of people living in Quebec say it’s much more important to live in the moment than to prepare for the future. English Canadians are a little more cautious on average, with 47 percent saying they prefer to enjoy life now. But both are well ahead of the United States were only 41 percent think so. As a result, brands that lean into experiences might have a better shot at winning Canada’s heart than otherwise.

11 Laugh a little
Lorne Michaels, himself a Canadian, can be credited with introducing many of his fellow Canadians, like Dan Aykroyd and Mike Myers, to American audiences on Saturday Night Live, from which they’ve often gone on to international stardom. Canada has a rich tradition of humour, which is one of its most beloved cultural exports. Not surprisingly, Canadians themselves love a good joke and that extends to their advertising. More than any other characteristic, humour improves ad receptivity among both men and women in Canada. So, if you want to break through the increasing clutter of the ad market, have a laugh. It’s not only good for you, it can help a brand too.

12 Cannabis, one year later
With some fanfare in 2018, Canada again stood out as a global trendsetter by legalizing the use of cannabis. Stores, including online ones, now offer a variety of ways to obtain legal weed. So, has legalization opened the floodgates of drug usage? Not yet. In 2018, Statistics Canada reported that 14 percent of Canadians used marijuana in the previous three months. Second quarter in 2019 shows it is up to a mere 16 percent. This sluggish uptake, however, is likely due to supply chain issues, as well as the slow opening of new stores. Once pot becomes more widely available, social acceptance should follow in its wake. That is breeding new business opportunities, as a raft of new Canadian brands like Burb and Tokyo Smoke are blending cannabis with clothing, coffee, and other products.

13 For the love of a store
The retail apocalypse that has unfolded south of the border has not replicated itself to any large degree in Canada. Instead, retail has transformed to become more enjoyable, streamlined, and digitally integrated. Canadians are bargain hunters and reward retailers who offer great value and shopping experience. Brands need to optimize their digital and physical presence to find growth in the omnichannel era or risk being left out.

14 Integrated retail is coming to Canada
Brick-and-mortar retail is not dead in Canada. It has transformed to become more enjoyable, streamlined, and digitally integrated. Canadians are bargain hunters and reward retailers who offer great value and shopping experience. Brands need to optimize their digital and physical presence to find growth in the omnichannel era or risk being left out.
Valuable as any, but with room to grow

The Top 40 Canadian brands this year are worth a respectable US$143,636 million. To see how that stacks up against other markets, BrandZ™ ranks at least the Top 30 brands in 14 countries, enabling us to make comparisons between them. And in terms of value, Canada is doing just fine. Compared with other nations, its Top 30 are almost exactly on track in terms of both average value of a brand and total valuation. When normalized against GDP, a telling metric given the financial weighting of BrandZ™ rankings, Canada can give itself a pat on the back. It’s slightly above average.

<table>
<thead>
<tr>
<th>Total brand value</th>
<th>Country GDP</th>
</tr>
</thead>
<tbody>
<tr>
<td>$143,636 million</td>
<td></td>
</tr>
<tr>
<td>$73.4 billion</td>
<td>51%</td>
</tr>
<tr>
<td>$54.4 billion</td>
<td>38%</td>
</tr>
<tr>
<td>$15.9 billion</td>
<td>11%</td>
</tr>
<tr>
<td>USA</td>
<td></td>
</tr>
<tr>
<td>Canada</td>
<td></td>
</tr>
<tr>
<td>Japan</td>
<td></td>
</tr>
<tr>
<td>Germany</td>
<td></td>
</tr>
<tr>
<td>France</td>
<td></td>
</tr>
<tr>
<td>Italy</td>
<td></td>
</tr>
<tr>
<td>Spain</td>
<td></td>
</tr>
<tr>
<td>Australia</td>
<td></td>
</tr>
<tr>
<td>China</td>
<td></td>
</tr>
<tr>
<td>Mexico</td>
<td></td>
</tr>
<tr>
<td>Brazil</td>
<td></td>
</tr>
<tr>
<td>India</td>
<td></td>
</tr>
<tr>
<td>UK</td>
<td></td>
</tr>
<tr>
<td>Netherlands</td>
<td></td>
</tr>
<tr>
<td>Singapore</td>
<td></td>
</tr>
<tr>
<td>Russia</td>
<td></td>
</tr>
</tbody>
</table>

Top 40 Most Valuable Canadian Brands breakdown by category

<table>
<thead>
<tr>
<th>Category</th>
<th>Number of brands</th>
<th>Brand Value US$ Mil.</th>
<th>% of total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Banks</td>
<td>6</td>
<td>66,241</td>
<td>46.1%</td>
</tr>
<tr>
<td>Telecom providers</td>
<td>6</td>
<td>32,149</td>
<td>22.4%</td>
</tr>
<tr>
<td>Retail</td>
<td>12</td>
<td>10,742</td>
<td>7.5%</td>
</tr>
<tr>
<td>Apparel</td>
<td>3</td>
<td>10,462</td>
<td>7.3%</td>
</tr>
<tr>
<td>Insurance</td>
<td>5</td>
<td>9,728</td>
<td>6.8%</td>
</tr>
<tr>
<td>Fast Food</td>
<td>1</td>
<td>6,757</td>
<td>4.7%</td>
</tr>
<tr>
<td>Energy</td>
<td>1</td>
<td>3,308</td>
<td>2.3%</td>
</tr>
<tr>
<td>Alcohol</td>
<td>3</td>
<td>2,169</td>
<td>1.5%</td>
</tr>
<tr>
<td>Airlines</td>
<td>1</td>
<td>1,146</td>
<td>0.8%</td>
</tr>
<tr>
<td>Entertainment</td>
<td>1</td>
<td>464</td>
<td>0.3%</td>
</tr>
<tr>
<td>Food</td>
<td>1</td>
<td>449</td>
<td>0.3%</td>
</tr>
</tbody>
</table>

Categories and brands

Banks
Canadian banks dominate the Top 40 in terms of brand value with 46 percent of the total rankings, three of the top five slots, and five of the top ten. Part of the reason is the outsized role Canadian banks play on the world stage. Throughout their history, they have invested heavily in developing Caribbean and South American markets, as well as in Europe, giving them an enviable global footprint. In their home market, Canadian banks have much stronger brands relative to other countries, likely due in part to the excellent regulatory environment in Canada, which helped cushion the country from the financial crisis of 2008/9. The standout brand among them is RBC (Royal Bank of Canada), which is a global powerhouse and the country’s top brand by value—and surprisingly, its #3 by Brand Contribution.
Telecom providers
While there are six brands in the telecom space in the Top 40, two of them are wholly owned subsidiaries of the others. This points to an issue in the Canadian telecommunications market: a lack of competition that has resulted in data prices much higher than those in its southern neighbour. Canada’s telecom providers are the least trusted of those of any country ranked by BrandZ™.

Canadas banks are trusted in line with banks in other global markets, though Canada’s comms providers are the least trusted of all globally.

If this year’s BrandZ™ data shows nothing else, it’s that they have room to grow their relationships with consumers. Telecom providers nonetheless account for 22 percent of the total brand value of the Top 40, led by Bell Canada, which has twice the brand value of its nearest competitor.

Retail
With 12 brands, retail has by far the largest number of entries to the Top 40, while contributing seven percent to the overall total. Many of the brands are also sub-brands of Loblaw Companies Limited, which operates as a single entity, spreading a single experience across multiple brands. Super C and Food Basics (Metro banners) are much the same store in two different provinces, yet their popularity within their markets is such that they have the financial strength to make it into the Top 40.

The category is also incredibly varied in terms of Meaningful Difference. Some brands, like Foodland, have substantially the same offerings as their rivals, while others, like Canadian Tire, are among the most unique brands in the world. This likely makes the category a volatile one, with several brands entrenched in Canadian life and others ripe for disruption.

The wild retail landscape
Canadian retail brands are among the countries most and least meaningfully different.

The BRANDZ™ Top 40 Most Valuable Canadian Brands 2019 retail landscape
Apparel
Generally, apparel is not a powerhouse category globally, but in Canada, clothing brands are among the country’s most dynamic and iconic. While making up only three brands in the Top 40, they nonetheless represent seven percent of the total brand value, roughly the same as the top 12 retailers. And that’s no surprise. All of them score incredibly high on Difference, with Lululemon leading the pack at a whopping 178 (where the average brand scores 100). Interestingly, two of the brands, Lululemon and Aritzia, under-index on Salience, indicating that they have an opportunity to invest in outbound communications. However, given all three brands’ plans for global expansion, look for this category to grow substantially in the coming years.

Insurance
The fifth largest category in Canada, insurance, accounts for seven percent of the total brand value of the Top 40. In a lightly differentiated market, few of the brands stand out, although many have long and rich histories in the country. At the moment, the most dynamic brand in the category, Intact Insurance, has been aggressively trying to grow, which has resulted in it scoring considerably higher than some of its peers on a range of brand health metrics.

Food
It might seem strange that only one food brand, President’s Choice, makes the Top 40. In truth, this is not much different from many other markets. The United States, for example, has only one food brand in its Top 100, while no food brands make the rankings in markets like South Africa.

Theory in action: Tim Hortons
Compared with its southern neighbour, which seems to create fast food restaurants at the same rate it does global controversies, Canada has relatively few, large home-grown brands in the space. In the Top 40, Tim Hortons is by far the most dynamic, with Tim Hortons leading the charge. Tim Hortons is Canada’s Most Meaningfully Different brand as well as its third Most Salient, while accounting for seven percent of the total value of the Top 40. This is impressive for what started as a coffee and doughnut shop, but now has an innovation centre dedicated to introducing the country to a range of new products, like its Beyond Meat® breakfast sandwiches.

Tim Hortons is also everywhere in Canada; even small towns that otherwise lack fast food restaurants might have two of its stores. This extensive footprint, together with its beloved coffee and doughnuts, make the Canadian brand almost as ubiquitous as any coffee. In the coming years, Tim Hortons should continue to grow as it moves beyond its saturated home market and takes on foreign brands like Dunkin’, which it has now been driven away from Canada.
Brand contribution

There are some brands that punch above their weight in BrandZ rankings because they score well on a measure we call “Brand Contribution”.

Brand Contribution is a score between one and five that measures the influence of brand alone on financial value. The Brand Contribution score a brand receives is the result of extensive consumer research, so it reflects the quantification of current sentiment among consumers towards a brand.

The inclusion of Brand Contribution scores in the formula used to generate brand value is one of the key ways that BrandZ rankings are distinguished from other brand valuation methodologies.

We can show how brand contribution works by looking at numbers 31 and 32 on the Top 40, Aritzia and Foodland. The revenue of the latter certainly dwarfs that of the former, but because Aritzia’s fans are loud and loyal, its Brand Contribution score is much higher than that of the food retailer, which operates in a lightly differentiated category. As a result, Aritzia has a slightly higher brand value.

Top 10 by Brand Contribution

<table>
<thead>
<tr>
<th>Rank</th>
<th>Brand</th>
<th>Category</th>
<th>Brand Value Rank</th>
<th>Brand Value (US$ Mil.)</th>
<th>BC Index</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Tim Hortons</td>
<td>Fast Food</td>
<td>6</td>
<td>6,757</td>
<td>5</td>
</tr>
<tr>
<td>2</td>
<td>Lululemon</td>
<td>Apparel</td>
<td>5</td>
<td>7,578</td>
<td>5</td>
</tr>
<tr>
<td>3</td>
<td>RBC</td>
<td>Banks</td>
<td>1</td>
<td>23,024</td>
<td>5</td>
</tr>
<tr>
<td>4</td>
<td>Aritzia</td>
<td>Apparel</td>
<td>31</td>
<td>684</td>
<td>5</td>
</tr>
<tr>
<td>5</td>
<td>Crown Royal</td>
<td>Alcohol</td>
<td>24</td>
<td>1,252</td>
<td>4</td>
</tr>
<tr>
<td>6</td>
<td>Molson Canadian</td>
<td>Alcohol</td>
<td>34</td>
<td>460</td>
<td>4</td>
</tr>
<tr>
<td>7</td>
<td>TD Bank</td>
<td>Banks</td>
<td>2</td>
<td>20,104</td>
<td>4</td>
</tr>
<tr>
<td>8</td>
<td>Canadian Goose</td>
<td>Apparel</td>
<td>17</td>
<td>2,199</td>
<td>4</td>
</tr>
<tr>
<td>9</td>
<td>Cineplex</td>
<td>Entertainment</td>
<td>33</td>
<td>464</td>
<td>3</td>
</tr>
<tr>
<td>10</td>
<td>Sobeys</td>
<td>Retail</td>
<td>37</td>
<td>392</td>
<td>3</td>
</tr>
</tbody>
</table>

Ways to win

1. Embrace uniqueness

Of course, this is easier said than done, but brands that can provide something people can’t get anywhere else tend to grow faster and be more resilient in the face of challenges. Uniqueness is not about a voice or stance in the marketplace; it’s about providing a concrete product, service, or experience that sets you apart.

2. Lead with purpose

Canadian brands with high scores for Purpose are much more valuable than those without. That’s because customers today expect brands not merely to provide goods and services but also to reflect their values. Finding a purpose is usually not hard—supporting it in a meaningful way, however, often includes aligning your entire organization behind it.

3. Improve the CX

Around the world, brands are disrupting categories by removing pain points in traditional experiences—think Uber, Netflix, and Jio. But all brands can study the experiences of its consumers in detail and find out where changes can be made to separate them from the pack.

4. Express your heritage

Brands should embrace what has traditionally made them who they are. Strongly communicating your history, founders, and the values behind them is one of the best ways to build Brand Contribution scores.
As with many things in Canada, the media marketplace may look simple, but once you scratch the surface, it presents significant challenges for advertisers. Canadians are among the peoples least impressed by advertising but most nuanced in their demands of it. They are fractured along language-based lines but also have lower expectations for personalization. They respond well to integrated campaigns but are likely to see media as trying to get their attention rather than benefiting them in any way. They, as we noted elsewhere, are a tough crowd.

So how are advertisers trying to reach them? By the numbers, digital is now the overwhelming choice for media spending in Canada. In 2020, it should comprise 58.2 percent of the total. That said, if you are a brand manager looking at this, you might wonder if you’re behind the curve. Not really. This number reflects a number of circumstances that have little to do with how big company marketers spend their money. For one obvious example, the great bulk of local, classified advertising has shifted to digital media and search marketing.

In addition, highly digitized businesses like Uber and Booking.com have created new business models that rely on data-driven advertising. By precisely targeting segments and measuring ROI, they can greatly increase their spending while maintaining their desired margins. Digital is also unique in that it has an unlimited inventory, which enables these new players and others to up their spending without cannibalizing dollars from TV and other media.

Nonetheless, digital’s share of total Canadian advertising spending is both massive and rapidly growing. In 2019, it is expected to increase 14 percent, while its growth will slow to a mere 12.5 percent in 2020.

At the same time, TV has largely stabilized as a media investment target for brands. According to one study, Canadians spend on average about one entire day a week watching television. While this sounds high, it’s about half as much as in the US. Still, if you’re looking to reach a broad audience in the country, TV remains an excellent medium.

That said, Canadians, like many of their global counterparts, find themselves in a long-term, cyclical shift in the way they watch TV. Live TV is staying essentially flat while cord cutting, OTT, and other “TV my way” services are displacing traditional, paid subscriptions. Of course, this is not an either/or proposition. Many paid TV subscribers also have OTT subscriptions, with Netflix being a dominant player in the country.

We can see roughly the same trends for radio. It comprises 8.7 percent of the total media spending, which is high for global averages and should remain roughly stable over time. However, Canadians are increasingly listening to audio streaming and other nontraditional forms of radio, which also offer much more sophisticated options for automated marketing.

If you’re looking for one area in which Canadians and their southern neighbours are entirely different, it’s outdoor advertising. The United States greatly under-indexes on this channel, while Canadians use it much more than is typical globally. This reflects the curious demographics of Canada, which is often portrayed as a land of pristine lakes and high mountain peaks but is actually the most urbanized of all G7 nations, with 82 percent of its population living inside a city. This makes it an ideal environment for billboards, and a great place for both digital and targeted strategies. Cinema advertising is also popular with Canadian movie-goers.

The one area entirely lacking in good news for the Canadian media market is print. If you’re looking for a leading indicator, Rogers Media recently sold its publication and custom content business, exiting publishing to focus on broadcast media. This is probably a good move. Newspapers are expected to decline three percentage points in 2019 and two percentage points in 2020, when they will only be 8.7 percent of the total market. Meanwhile magazines face similarly grim news. They should fall three percentage points in 2019 and one percentage point in 2020, when they will comprise only 9.4 percent of the market. This probably requires no explanation, as people have been replacing sheaves of paper with electronic devices for some time.

Overall, the Canadian media market is growing quickly and is expected to rise six percent to a total of $12.7 billion in 2020.
Ways to win
Canadians may be a rough audience for brands, but they’re not impossible. Kantar’s annual AdReaction report identified five ways that brands can succeed in this challenging market.

1  Comprehensive integration
The rule here is simple. The more integrated your campaign is across different media, the better it will perform. This is true for both English and French-Canadian consumers in roughly the same proportion. They prefer to see the same logo, message, and visual theme whether an ad appears online, in print, or on TV. Integration is also an area where Canadian advertisers have room to improve. Twenty-six percent of all Canadian campaigns are not integrated at all, and 29 percent had similar ads but were not customized to individual media. That is a lot of missed opportunity.

2  Start with an idea, not an ad
Too often, advertisers start by making an ad and then building assets around it. It’s much better to start with a core idea and then let that flow to all other activations. Canadian readers of this report probably need no introduction to CIBC’s snarky penguins, but if you’re outside the country, it’s worth looking up this campaign on YouTube. It’s an excellent example of how a central idea can be expressed in different but effective ways to sell different products and services.

3  Test everything
Just because everyone liked your TV commercial does not mean they will respond well to your targeted placement on Facebook. It’s important to bring the same level of creativity to every part of your integrated media campaign if you want to get the most out of your investment. Part of that is ensuring that you test every execution and select the most effective variant for use. In doing this, it’s worth remembering that the French and English markets can differ greatly in their responses, especially around influencers and celebrities.

4  Don’t channel surf
While integrated campaigns perform better than those that are not integrated, not all channels are equal when it comes to the Canadian market. Seventy-two percent of both English and French Canadians feel they are seeing more ads now than three years ago. Sixty-five percent of English-speaking Canadians and 62 percent of French-speaking ones feel that ads are more intrusive now. The key takeaway here is that you need to be specific and targeted about whom you reach and when and where you reach them. Blanketing every possible touch point may very well turn off the audience you’d like to impress. And a good rule of thumb is that, the younger an audience is, the more likely it is to skip ads, want shorter videos, desire to be entertained rather than persuaded, and want explicit value from an ad, like a coupon.

5  Customize for platforms
As people are viewing content on more and more platforms, like YouTube or Facebook, advertisers need to take into account the preferences for it. On YouTube, for example, videos should follow one of two simple strategies: cut down in size or cut to the chase. Thirty-five percent of English Canadians and 32 percent of French Canadians want to know quickly if they’re interested in an ad on the platform. Or they want the ad to be over quickly before they have to decide whether to skip it. A make-for-TV-and-release-to-all approach sadly doesn’t work anymore.

Wealthsimple
Theory in action: Wealthsimple
Wealthsimple is one of Canada’s more unique digitally native brands. An investment platform aimed at millennials, it relies heavily on content and advertising to drive business, including everything from automated marketing to an edgy online magazine run by a former editor of GQ.

Above all, Wealthsimple is willing to take risks in its marketing. For example, its recent #TomorrowBeginsToday campaign was produced in-house and directed by Jonathan Aldrich from the French electronic music duo The Blaze. It featured highly emotional videos, each shot of people at a critical juncture in someone’s life. Some are obvious, like pregnancy or weddings, but others were much rawer, including a kid getting out of prison, a woman angrily quitting her job, and a man lying on his deathbed surrounded by family.

While Wealthsimple may not be in the Top 40 Canadian brands yet, its highly integrated approach is certainly keeping it top of mind for its customers. The brand is currently consolidating its success in its home country and expanding into Europe and the United States, where it hopes to emulate the success of other Canadian financial brands.
Economy & demographics

Toronto is the fourth largest city in North America after Mexico City, New York City, and Los Angeles. 27 US states are partly north of the southernmost point of Canada. Too big for a wall: Canada and the United States share the longest land border the world.

Population of Major urban areas

- **Toronto**: 6.1 million
- **Montreal**: 4.2 million
- **Calgary**: 1.5 million
- **Edmonton**: 1.4 million
- **Vancouver**: 2.5 million
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Urbanization

- 82% of Canadians live in an urban area
- 90% live within 160 kilometres of the US border

Education

- 91% of Canadians have a high school degree
- 35% have at least a bachelor’s degree

Marriage

- Only 46.4% of Canadians over 15 are legally married
- From 2006 to 2016: Same-sex couples increased 60.7%
- Opposite sex couples increased 9.6%

Population by age

- 0-14 years: 15.43% (male 2,839,236 / female 2,698,592)
- 15-24 years: 11.62% (male 2,145,626 / female 2,023,369)
- 25-54 years: 39.62% (male 7,215,261 / female 7,002,546)
- 55-64 years: 14.24% (male 2,538,820 / female 2,570,709)
- 65 years and over: 19.08% (male 3,055,560 / female 3,791,940)

Religion

- Catholic: 39%
- Protestant: 20.3%
- Anglican: 5%
- Baptist: 1.9%
- Lutheran: 1.5%
- Pentecostal: 1.5%
- Presbyterian: 1.4%
- Other Protestant: 2.9%
- Other Christian: 6.3%
- Muslim: 3.2%
- Hindu: 1.5%
- Sikh: 1.4%
- Buddhist: 1.1%
- Jewish: 1%
- Other: 0.6%
- None: 23.9%

Not very religious

In 2005, only 21% of Canadians over 15 claimed to attend church weekly.

Economy & demographics

Total area

9,984,670 km²
of which 891,163 km² is water

Population

37,412,852

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Too big for a wall: Canada and the United States share the longest land border the world.

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- Sikh: 1.4%
- Buddhist: 1.1%
- Jewish: 1%
- Other: 0.6%
- None: 23.9%

Not very religious

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GDP: $1.9 trillion (US$)
GDP per capita: $48,400
Median income: $35,000

GDP annual % growth

<table>
<thead>
<tr>
<th>Year</th>
<th>GDP Annual % Growth</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014</td>
<td>2.86</td>
</tr>
<tr>
<td>2015</td>
<td>1.00</td>
</tr>
<tr>
<td>2016</td>
<td>1.41</td>
</tr>
<tr>
<td>2017</td>
<td>3.05</td>
</tr>
<tr>
<td>2018</td>
<td>1.9</td>
</tr>
</tbody>
</table>

Stocks value traded 2018 (US $)

<table>
<thead>
<tr>
<th>Region</th>
<th>2018 Stocks Value Traded (US $)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Canada</td>
<td>1.4 trillion</td>
</tr>
<tr>
<td>China</td>
<td>15.1 trillion</td>
</tr>
<tr>
<td>Germany</td>
<td>1.6 trillion</td>
</tr>
<tr>
<td>Japan</td>
<td>6.3 trillion</td>
</tr>
<tr>
<td>Mexico</td>
<td>94 billion</td>
</tr>
<tr>
<td>United States</td>
<td>23 trillion</td>
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</tbody>
</table>

Healthcare expenditure (% of GDP)

<table>
<thead>
<tr>
<th>Region</th>
<th>2018 Healthcare Expenditure (% of GDP)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Canada</td>
<td>10.5</td>
</tr>
<tr>
<td>China</td>
<td>5.0</td>
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<tr>
<td>Germany</td>
<td>11.1</td>
</tr>
<tr>
<td>Japan</td>
<td>10.9</td>
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<tr>
<td>Mexico</td>
<td>5.5</td>
</tr>
<tr>
<td>United States</td>
<td>17.1</td>
</tr>
</tbody>
</table>

Percentage of people using the internet

<table>
<thead>
<tr>
<th>Region</th>
<th>Internet Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>Canada</td>
<td>92.7%</td>
</tr>
<tr>
<td>China</td>
<td>54.3%</td>
</tr>
<tr>
<td>Germany</td>
<td>84.4%</td>
</tr>
<tr>
<td>Japan</td>
<td>90.9%</td>
</tr>
<tr>
<td>Mexico</td>
<td>63.9%</td>
</tr>
<tr>
<td>United States</td>
<td>75.2%</td>
</tr>
</tbody>
</table>
Getting gender right: portraying women in Canadian advertising

For the past several years Kantar has shared multiple learnings about ad transferability. Our key insight has been that while ads can be used in more than one country, very few ads that are outstanding in one country are outstanding in another. This is a result of analysis of over 500 exceptional ads (the top five percent of our database) globally that were aired in more than one country.

Factors that impact an ad’s ability to travel include brand status in the different countries, as well as their cultures. Levels of individualism can differentiate cultures, as well as issues like societal gender roles.

Globally, only about a third of ads with exceptional performance continue strongly in other markets, while only about one in ten remain at that peak level of performance. In Canada, many advertisers use ads created in the US to save production budgets, but the larger media budgets are often wasted on creative that doesn’t speak to our local market. Let’s face it, we have a different value system than our neighbours to the south, and by ignoring it we run the risk of damaging the brands we invest so much in building.

“AdReaction: Getting Gender Right,” Kantar’s recent study on the role of gender in advertising, shows that on a global basis, the vast majority of male and female marketers believe that their ads feature positive attainable female role models, but analysis of our global copy-testing databases reveals that only four in ten female consumers feel they are portrayed favourably.

The disconnect isn’t for lack of effort on the part of Canadian marketers. Eighty-two percent of them target males and females together, while 15 percent exclusively target females. However, many base their targeting on stereotypes that don’t reflect reality for many Canadians.

The study also shows that Canadian men and women claim to share household decision making in many categories (with 90% of both men and women sharing decision making responsibilities in grocery buying). While Canadian ads are much more likely to feature women, men are twice as likely to be prominently featured when both genders are present. This misses the mark on the equal roles that women and men play in the customer journey. To reinforce this, an analysis of Kantar’s copy-testing database found that ads featuring both genders were much more impactful in Canada than in the US.

Apart from how prominently women are featured in ads, we also found some creative opportunities. The use of humour improves ad receptivity for both genders in Canada more than any other ad characteristic. However, there is a gap in how males and females receive humour, with women finding ads less funny than men. Part of this could be due to fewer ads featuring funny women, as far fewer humorous ads feature females using humour than males. It could also be due to foreign copywriting that is not in step with Canadian women.

Given the size of media investments over production, there is an opportunity for Canadian advertisers to rethink how ROI could be improved through better human understanding and connection to our local consumers. How families and partnerships are portrayed in markets like the US heartland does not necessarily reflect Canadian values, and we have found that ads with negative engagement can negatively impact brand equity and sales. As we strive to make our companies and management more representative of the diversity that surrounds us, we also have an opportunity to change how our brand messaging is created and who creates it.
Understanding the consumer purchase journey: Connecting great marketing to great outcomes

Ask any great marketer for the source of her inspiration, and she’ll tell you that everything starts with the consumer. To communicate effectively, you must understand your customers and their needs, motivations, and hidden desires.

Why do they behave the way they do today? And most importantly, what would it take to shift that behaviour once, repeatedly, and forever? Increasingly, a great campaign is defined not only by its clever copywriting, breathtaking imagery, or heart-wrenching emotional response, but rather by its outcomes—and its ultimate ability to drive purchases.

No more backseat drivers

The importance of the purchase outcome is obvious, but it’s often relegated to a measurement metric applied at the end of a campaign, rather than a driving force behind the campaign’s initial plan. Building outcome-based thinking into the strategic process requires discipline, a proven methodology. The first step: truly understanding your existing client base. Who buys your product today, and what motivates their purchases? Is the group homogenous, or is it comprised of distinct segments, each with their own values, motivators, and purchase occasions?

As we better understand these unique tribes, we can achieve clarity around key growth opportunities. Is it time to expand our offering to different income segments (Hello, BMW), or can we encourage our current customers to buy more of the same product (Activia daily challenge, anyone)? What innovation can create sufficient value to elevate increased annual per purchase? Though not every strategy will drive growth, it’s important to take the time to explore options and determine the best opportunities for success.

What goes around

With our audience clearly segmented and our sources for growth identified, we can now decade the purchase journey itself. While we have embraced the notion of a sales funnel for over 120 years, today we find it more useful to think about the journey as cyclical and formed of four distinct parts:

- **Priming stage.** This stage of the journey builds bias toward individual brands, often at a subconscious level. It’s an important phase within the purchase journey, as it increases brand-specific purchases by three to nine times when it’s executed well. The priming stage can last a short time, or it can last years. It ends when the consumer is motivated by a potential purchase.
- **Trigger.** You want it, you need it, you’ve gotta have it. Here we seek to understand the drivers—physical, emotional, practical, and aspirational—that propel the consumer into the active stage.
- **Active stage.** It’s now go time. The consumer is in market, researching and deciding on the brand of choice. For a car, this could take a couple of months. For a chocolate bar, it could take a few seconds. Regardless of the product, how can marketers impact a purchaser’s thinking at this crucial timing right before he or she makes a final decision?
- **Purchase.** Apple Pay, plastic, or cold hard cash—the deal is done. You’ve converted your consumer (or missed an opportunity to do so). But the work isn’t over. They need to have a great experience with the product they’ve bought, which will start the priming phase of the purchase journey all over again.

Comes around

This purchase journey segmentation is more than academic. It allows us to identify distinct states of mind, understand fractures in the path to purchase; and intercept the consumer with timely, relevant media and messaging. Let’s now layer in unique audience segments to identify how different groups may build bias, react to triggers, and research pre-purchase. These insights are essential to the development and delivery of the engaged messaging most likely to resonate with each of our segments. While this understanding is crucial to paid advertising, the savviest of marketers will also connect it to their owned and earned touchpoints.

For a simple example, let’s look at the luxury auto market. If we understand that a premium automotive trigger is connected to reward, status, and self-image, we can craft a narrative in the priming stage to cultivate a readiness to embrace it. Likewise, if the active stage of a yogurt purchase is highly influenced by visibility on a shelf, we can select packaging that pops in the grocery store.

Full circle success

How do we map, manage, and measure our success? By investing in good purchase journey research and using it to diagnose your audiences and identify sources of growth. Decide on your most effective touchpoints and marry them with well-crafted creative, deployed with excellence. Then measure the results objectively, optimizing and iterating toward true sales data. Because a truly great campaign is only made great by its outcomes.

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The Wavemaker Canada team includes 200 experts servicing more than 60 clients, all united through our focus on understanding, accelerating and optimizing the purchase journey.
The late bloomer: Canada’s cultural rise and how brands can keep up

Remember that kid at school that everyone used to think was nerdy? The one who didn’t mind doing her own thing because she wanted to. And then eventually, that kid turned out to be super cool and everyone wanted to be her friend? Well, that kid is Canada. And just like that kid, when it wasn’t until later that people found out they were missing out, brands who don’t get to know modern Canada are missing out too.

For a long time, Canada was known for its snow, hockey, public health care, strong environmental efforts, and polite (and maybe a bit boring) people. But today’s Canada looks a lot different than it used to. From our growing cities (and I’m not just talking about Toronto, Montreal or Vancouver) and our diversifying population to our entrenched values and cultures, being Canadian today means many different things.

We’re known for our world class talent: Drake, The Weeknd, Shania, Celine, The Ryans, The Biebs, Seth Rogen, Mike Myers, and the list goes on. But more than that, Canada is proudly progressive, with a strong history of liberal democracy. In a world that sometimes seems to be pulling apart, Canada continues to stand up for tolerance, inclusivity, and the collective good.

We also play an important soft power role on the world stage. We lead the conversation in sustainability. We are a nation of makers and doers, where craft matters. And we are leaders in technology and innovation, having become an important hub for startups, attracting the capital and talent that fuels them.

But while Canada has come of age, many brands still haven’t—whether homegrown Canadian brands or multinationals trying to be relevant in the people, the places, and passions. Hear the richness of these cultures.

Canada’s cultural values are its passions

People: the power of diversity

Canada is a county of immigrants (we welcomed 1.2 million immigrants between 2011 – 2016 alone). While Canada’s indigenous peoples inhabited these lands for thousands of years before the first settlers arrived, we have since welcomed millions of people from all corners of the earth. And while the first wave of immigrants largely came from Europe, today’s new Canadians are largely coming from Asia, South East Asia, Africa, and the Middle East. Close to 20 percent of Canadians identify as visible minorities. And with them they’re bringing a rich diversity in culture: food, languages, religion, traditions, fashion, music, art, talent, and design. Oh, and money too. Today, ethnic minorities spend one of every three dollars spent on consumer goods. And when it comes to brands, the opportunity goes beyond just casting visible minorities in their ads. The bigger opportunity is to not just represent diversity, but to truly understand and appreciate cultural nuance—and to celebrate the richness of these cultures.

Places: when Tier 2 suddenly catches up with Tier 1

When we think of urban Canada, we immediately conjure up the big three: Toronto, Vancouver, and Montreal. And in fact, close to one-third of Canadians live in these cities. But 82 percent of Canadians now live in mid-to-large cities, the highest concentration of the G7. Canada’s second tier cities are trending. Cities like Hamilton, Kewlona, and Saskatoon are all attracting educated, talented young people looking for affordable housing and economic opportunities. New Canadians are also choosing to make these smaller cities important urban hubs. As they do, they’re displacing traditional industries, bringing exciting new economies. Hamilton has a burgeoning tech and arts scene; Saskatoon is leading the way with urban farming; Kitchener–Waterloo is often referred to as Silicon Valley North; and Victoria is pioneering new technologies in sustainable living. With these new urban hubs comes new energy in food, arts, and architecture. The sleepy small towns are now becoming some of Canada’s edgiest, coolest postal codes. Brands have a big opportunity for growth beyond The Six and should work to spot trends in some of these unexpected places.

Passions: Canadian values are its passions

Many countries define themselves by their history, national monuments, or power on the world stage. Canadians define themselves by their values. Sixty-nine percent of Canadians say “our values” are their greatest source of national pride. At a time when the rest of world seems to have gone a little crazy, Canada isn’t just living its values, it’s defending them. With the global rise in nationalism and protectionism, we remain staunch in our commitment to optimism, openness, and progressive values. And while we might feel a little lonely sometimes defending social justice, it’s a constant reminder of “why the world needs more Canadians.”

For brands to truly resonate with Canadians, it’s critical to understand and reflect these deep cultural values. While purpose-led brands are sexy in the world of marketing, a commitment to values is truly Canadian.

Where once Canadians would quietly defend themselves with the differentiating belief that “we’re not American,” we now proudly declare, “I am Canadian.” While still a bit humble, we’re confident, we walk a little taller, and we even have a little swagger. For brands to be successful in a modern Canada, they need to get out there and soak it in—the people, the places, and passions. Hear the languages, taste the tastes, dance to all the music. Reflect a Canada that is young, vibrant, progressive, multi-faceted, and, yes, even cool. Shake off the flannel and explore modern Canada.

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TAXI
Built on the mantra “Doubt the Conventional, Create the Exceptional,” TAXI is internationally recognized for its strategic, creative, digital, and design capabilities.
Beyond the catchphrase: why brands need to adopt customer centricity

Each era in marketing comes with its own catchphrase, and the past few years have been all about customer centricity. It has become the North Star for brands as they refresh their growth strategies in response to shifting marketplace dynamics. Many also seem to be adopting the phrase merely because everyone else is, and they do not want to risk being left behind. However, adopting a slogan is not the same as adopting a mindset. So, what does it mean to be customer-centric and why does it matter?

A cultural re-jig

At its core, customer centricity means placing the end user of your products and/or services at the centre of the decisions you make, on both an individual employee level and holistically as an organization. The first step in achieving true, sustainable customer centricity is to develop a clear vision of what the brand wants to be. That vision must then be shared widely across the organization so every employee, even if not directly customer-facing, can contribute to the brand experience. While you can articulate your customer-centric vision in a top-down manner, you should develop and implement it in a more bottom up way, listening to your customers and melding their experiences into your organization’s growth strategy. This can help employees understand the role they play in the brand’s growth and elevate engagement levels by satisfying a deeper sense of purpose and alignment to the organization.

Know your relationships

To place your customers at the centre, you must first truly know them and the relationships that your brand has established. This goes beyond measuring your customers’ satisfaction and even beyond knowing their propensity to recommend you to others. It is about the actual strength of the current relationships you have, how they compare to your competitors, and how to safeguard them while also working to improve your performance in impactful areas. Customer relationship strength can be as simple as asking two questions—but its measurement offers powerful insight into potential blind spots and areas where you are expending more effort than needed.

Relationships are built through interactions customers have with your brand—each and every encounter ladders up to a holistic experience that is governed by two critical elements: how you perform against customers’ needs (the rational part of the relationship) and the degree to which your customers prefer you over your competitors (the emotional part). Ask yourself: Do you know how strong are these relationships? Do you know which levers to pull and where to pull back? Ultimately, you do not have to be good at everything, just at the things your customers need from you.

Create a powerful brand

Focusing solely on your customers, however, will not provide a well-rounded view of your brand. Retention efforts are critical to sustaining business growth, but to get to that point, the first step is the acquisition strategy your organization implements, measures, and monitors over time.

“Brand equity” is a widely used term, but what does it really mean? Ultimately, we are trying to imprint our brand on the minds of consumers. This is a longer-term process, one that can be difficult to implement if you do not know the power of your brand in the marketplace relative to its competitors. We strongly believe in quantifying the degree to which your brand is meaningful, different, and salient. Once you know this, the next step is to understand how to increase your brand’s power and build its equity. However, this leads to an essential question: where does your brand’s credibility lie and are you leaving equity behind?

Knock down silos

We can inadvertently leave equity behind when we work within silos and do not marry what we hear from our customers to the perceptions held by all consumers about our brand. Through marketing and brand communications, a variety of promises are made, such as our brand is strong and unique, our products and solutions are right for you, and our service levels are incomparable. By telling your brand story to consumers, you can drive choice in your favour, but only if your customer experience lives up to the promises you’ve made, 41 percent of consumers are unlikely to stay loyal, 56 percent would not recommend your brand, and 62 percent are unlikely to buy additional products or services from you.

That is why customer experience, brand strategy, and employee experience can no longer sit apart. Together, they create a ring around your brand equity and business growth. When they are linked together, you are positioned to take a holistic view of your brand, drive organizational change, and speak one consistent language across your organization and initiatives. In doing so, you can place your customers at the centre of your business decisions and differentiate your brand in a manner that builds equity. While not always easy, looking past short-term objectives and taking a view of long-term value creation ultimately serves to build your brand and future-proof your business.

The end game

Globally, brands that saw the greatest increases in brand value in 2018 were those seen to be delivering a superior brand experience. In an age when customers know what they want, and when and how they want it, it’s never been more critical to focus on experience. If the experience your brand delivers does not live up to the promises you’ve made, 41 percent of consumers are unlikely to stay loyal, 56 percent would not recommend your brand, and 62 percent are unlikely to buy additional products or services from you.

Kantar

Kantar is the world’s leading data, insights and consulting company. We understand more about how people think, feel, shop, share, vote and view than anyone else.
The Effects of Media on Retail

Two words say it all: “over-pivot” and “underestimate.” Retail brands have recently been chasing clicks and attribution in the performance marketing world. As a result, they over-pivoted their media spend into digital channels and underestimated the importance of brand. This initially made sense, as over the past two years the retail industry was preparing for an explosion of e-commerce set to occur in 2020. But these decisions were overzealous, and too many retailers have abandoned and ultimately weakened their brands.

The good news? Our Mindshare Retail in Canada Study shows that Canadians love to shop at Canadian brands. They are not jumping into the Amazon Prime world and continue to be loyal to their favourite retailers. Trust, reputation, and a “name I know” continue to be major factors in why Canadians shop where they do.

Our research also shows that while digital has a massive influence on the shopping journey, Canadians still like their bricks-and-mortar experience and expect the two to work together. The e-commerce presence and physical store design need to make sense together and work to exemplify the very best of a brand.

It is true that digital is powerful, but it needs to serve the brand experience, not dominate it. Its creative needs to be relevant, and marketers should take great care as to how a brand shows up in these channels. We need to move from “we must be there” to “how we can be there in an effective, relevant way.” As much as marketers are trying to capitalize on impulse, our research shows that Canadians are budget-minded and considered in making their purchases.

We are at a moment when personalization should not be uncanny, and convenience needs to be considered throughout the entire customer journey. We are on the precipice of a world in which data overwhelms decisions instead of empowering them. For instance, a great data lake driven by a team seeking insights should help all retailers take pause and ask who they think their customers are or could be. It is important to challenge assumptions, seek new opinions, and build a solid foundation for what is to come in the competitive landscape and changing behaviours of Canadian shoppers.

Before we embark on the biggest year of growth in e-commerce in our history and a steady decline in big box stores across Canada, we should take a moment to reflect on branding and the personality of the brand in the complete experience, including media.

Brand experience needs to be consistent throughout the entire media experience. In recent years, we chased abandoned carts with more of the same product. Instead, when creating media plans, we should look at where things like video can live and how the creative intersects with the audience to either grab attention or create fatigue.

What is clear is that the approach to planning, buying, and optimizing media for retailers can no longer sustain brands in siloed media channels. Instead, retail marketers must consider the experience they create and ensure that it exemplifies the best of their brands. They also must consider how sales data flows to media partners in order to help drive the best investment decisions.

Now isn’t the time for retailers to over-pivot or underestimate. It’s time for them to reevaluate their media strategies to embrace the rising expectations of Canadians in their shopping experiences.

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Mindshare was born in Asia in 1997, a WPP startup with a desire to change the media world.
Acculturation and change: why we need to move away from assimilation and towards pluralism in marketing

We all know Canada is changing in many ways. Above all, however, it is changing demographically, and that has major implications for marketers. According to Stats Can, 21 percent of people in Canada are foreign born. Looking at the total Canadian population, 23 percent are visible minorities. And that’s not just Vancouver and Toronto. By 2036, 11 major Canadian cities will be anywhere from one-third visible minorities to majority-minority (Toronto and Vancouver already are, along with many medium-sized cities, such as Burnaby). As we think about our new Canada, as marketers we face three important questions:

• What does it mean to be a Canadian today?
• How do we measure values, attitudes, and beliefs?
• How should we approach marketing in the new Canada?

What does it mean to be a Canadian today?
When people think of civil rights and the year 1954, they immediately go to the United States and the landmark Brown vs. Board of Education case. But 1954 was also a profound year for Canadian history and the country we are today. That year, Black Porters sent a delegation to Ottawa and called for Canada to be “a new nation state created out of all peoples of the world, a country of equality, where specific ethnic groups would not have all the privileges and others none.” That sentiment, which then inspired politicians, led to our society becoming pluralistic, and in 2019, the practical side of this is coming to fruition. As a result, traditional notions and tropes of what it means to be Canadian are changing, including what it means to be Canadian racially, what sports we like (Raptors, anyone?), what music we listen to, what food we eat, and so on.

How do we measure values, attitudes, and beliefs?
When we think about attitudes and beliefs that consumers have, many times we rely on data that is not representative of the broader Canadian society (which is more than just age, gender, and region). As Canada changes, the way we go about writing creative, media, and product briefs should change too. There are different approaches to this. We have traditionally focused on a total market approach in which we look for commonalities. But much of what are believed to be commonalities are not, due to bad data collection practices. As we dig deeper, we notice that there are things that bind us and things that set us apart. And those differences can get lost in a total market approach. In this changing Canada, marketers should consider approaches to data collection that represent the Canadian population in new ways.

What are new approaches to marketing in the new Canada?
So, what are we talking about? In particular, we have three additional modes of thought when it comes to the new Canada:

• Multicultural marketing: This is a focus on content that is created for specific audiences on specific channels (e.g. TD Bank’s “How South Asians Get #RetireReady”).
• Cross-cultural marketing: This is a focus in which insights from a minority group lead the insight process, but as the idea becomes more macro, it can cut across all audiences (e.g. Nike’s “Like a Londoner”).
• Total marketing: While acknowledging there are many minority groups in a population, in this approach we try to find the one thing that unifies all audiences (e.g. Honeymaid’s “This is Wholesome”).

In conclusion
As Canada becomes more diverse, its mindset is more focused on acculturation rather than assimilation, i.e. adopting an existing culture to the dominant one rather than seeing it disappear altogether. For marketers, especially those with mass market brands, this means we need to challenge what it means to be Canadian in order to find better insights, including how we measure values, attitudes, and beliefs. In addition, as we move further into this new and exciting period in Canadian history, marketers also need to challenge themselves in their marketing approaches as sometimes a bottom-up approach (i.e. cross-cultural marketing) may work better in such a pluralistic country.

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john st. is known for its success in reinventing brands that are losing their point of distinction in a rapidly commoditized world.
Speak easy in a voice-enabled world

Voice search has given marketers yet another touchpoint on the consumer’s shopping journey. More and more articles are being published on this topic with a focus on how brands should take advantage. However, only a small portion of Canadians have scratched the surface of using voice technology—and not for making a purchase. Brands need to take a step back to understand how their audience is utilizing voice and where the opportunity lies.

We know that English and French Canadians consume media in different ways. With voice search, this is no different. Our own proprietary research at Mindshare shows us that 40 percent of English Canadians use voice technology regularly, compared to only a third of French Canadians. The bigger difference is how both audiences are utilizing the technology. Forty-four percent of French Canadians say that they use voice technology because it’s fun, cool, and futuristic, all of which play on emotional benefits. By comparison, over half of English Canadians claim they use voice technology because of functional benefits, e.g. it’s faster and more convenient than typing.

Even when compared to the rest of the world, Canadians use voice technology in unique ways. Canadians are 29 percent more likely to use voice technology to ask questions and support activities in managing their home than the global average. That said, as a country, we are tracking behind the global average on using voice to find information about products or brands. Canadians simply aren’t early adopters of voice. This is partly due to the delay of Google Home and Amazon Alexa in crossing the 49th parallel but there is more to it.

For those Canadians who aren’t using voice, the most common reason was concerns around privacy. So much so that those who have not adopted voice are decidedly hesitant to do so. This is even worse among French Canadians, a quarter of whom say that they have no interest of using voice technology ever. This means 2.2 million people aren’t even considering adopting voice.

While voice search is well on its way in other markets, Canadian brands need to be aware of the implications around their desired audiences and understand how to be helpful in a question and answer-driven voice world but not enter the uncanny valley and violate privacy.

This is a good time to prepare for when Canadian sentiment shifts. The first place to start is with search engine optimization and reworking content strategies. Brands need to ensure that content online is not only search engine optimized (SEO) for text but also for optimized voice. This includes creating featured snippets, answers to questions people always ask, and simplifying for quick answers for mobile users. And they need to do this in French and English.

Voice is already here in Canada, but it’s being adopted in the typically slow and reluctant way of Canadians. Brands need to dig into the data and research to understand how different areas and segments inside our country—demographic, regional, and language-specific—are responding to the new technology and what approaches will best connect brands to consumers. Ignoring voice is not an option, but rushing in without understanding the landscape is also less than ideal. It is time to work on the foundation of voice but not spend too much energy building massive voice solutions.
Brand Purpose in Canada

The power of purpose is receiving a lot of attention in the marketing world these days, but is purpose a driver of brand power in the Canadian marketplace?

The short answer is yes. When executed correctly, purpose is a powerful driver of brand growth. According to an analysis of Kantar’s Global BrandZ database of the world’s 144 most valuable brands that have been tracked over the past 12 years, those that are recognized for high commitment to purpose have grown brand value twice the average (213 percent vs. 77 percent). The key to this finding is the word “recognized.”

For purpose to drive brand growth, consumers need to be aware of and recognize a brand’s efforts in making people’s lives better through its products, marketing, and way of conducting business. Getting credit from consumers is not easy. Success relies on three key elements: meaningfulness, authenticity, and storytelling.

Canadian Tire, the 97-year-old retailer of auto parts, tools, home décor, and sporting goods, is one of the top-performing Canadian brands in BrandZ metrics when it comes to being recognized for having strong brand purpose. With its ascent in global popularity, it is no surprise that Canada Goose also stands out in BrandZ metrics for its recognizable purpose. The brand has achieved success, in part due to its maniacal focus on authenticity and staying true to its northern heritage. The brand has built an extreme cold weather performance in places like Antarctica and Mt. Everest and still manufactures most of its products in Canada. The brand honours the north by being unapologetic about its use of traditional materials to help deliver its performance and functionality, as well as by partnering with Polar Bears International and supporting northern communities through its Jumpstart children’s charities. Canadian Tire has always found a way to tell its brand story in an inclusive, Canadian way.

While not originating in Canada, McDonald’s has been in this country since 1967 and is another brand that Canadians recognize for having a strong brand purpose. The brand took a different approach to authenticity by using its “Our Food, Your Questions,” campaign to debunk myths about McDonald’s food quality. The courageous and transparent approach appealed to Canadians, who tend to have a healthy skepticism toward advertising claims. With its commitment to families, use of fresh ingredients, locally sourced foods, and the impact driven by the Ronald McDonald House Charities, McDonald’s masterfully tells stories that connect directly to the brand and how it is focused on making lives better.

The third and final example is Canada Goose. With its ascent in global popularity, it is no surprise that Canada Goose also stands out in BrandZ metrics for its recognizable purpose. The brand has achieved success, in part due to its maniacal focus on authenticity and staying true to its northern heritage. The brand has built an extreme cold weather performance in places like Antarctica and Mt. Everest and still manufactures most of its products in Canada. The brand honours the north by being unapologetic about its use of traditional materials to help deliver its performance and functionality, as well as by partnering with Polar Bears International and supporting northern communities through its Northern Resource Centre Program. Canada Goose's purpose flows through every facet of the organization, which creates a strong brand narrative that no advertising campaign alone could achieve.

To create an impactful purpose for your brand, remember the following key lessons.

• Connect meaningfully. Ensure your purpose matters to people and is central to what the brand is and how it acts. Consumers are not going to pay attention to your brand’s purpose unless it is something they care about. Whether it be Canadian Tire evoking pride, McDonald’s inspiring exploration, or Canada Goose inspiring adventure, these brands understand the power of purpose and how it is something that people care about. Whether it be Canadian Tire evoking pride, McDonald’s inspiring exploration, or Canada Goose inspiring adventure, these brands understand the power of purpose and how it is something that people care about.

• Use effective storytelling. A strong purpose lends itself to compelling narrative. Harness stories to maximize the effectiveness of your brand purpose, ensuring that there is a clear link to the brand and focusing on connecting with consumers on an emotional level. The key here is to demonstrate the impact of the brand’s efforts rather than simply telling people about them. For example, Ronald McDonald House Charities shows families supporting each other in their advertising as opposed to talking about the amount of money raised or invested.

• Purpose is more than advertising. It needs to flow through the organization top to bottom. There is nothing more inauthentic than a brand purpose that is manufactured just to be part of an advertising message. Canadian Tire and Canada Goose develop products with their brand purpose at the heart of the process. Advertising should be used to amplify how your brand or business delivers on its purpose, and not be the sole means of supporting it.

Canadian consumers today recognize and reward brands that exhibit a strong, useful, and yet authentic purpose. By following the lead of some of Canada’s best brands, marketers can find ways to create an organization that understands its purpose, finds opportunities for supporting it, and explains it in a natural way that resonates with the public. Given the uniqueness of many Canadian brands, embracing a strategy that lends itself to natural conversion is certainly possible, if not entirely easy. Let’s start thinking big.

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KANTAR
Kantar is the world’s leading data, insights and consulting company. We understand more about how people think, feel, shop, share, vote and view than anyone else.
### Top 40 Most Valuable Canadian Brands 2019

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*Canada Top 40 Total Value: US$ 143,636 million*

(*) Great West Life is transitioning to Canada Life brand
RBC
Parent Company: Royal Bank of Canada
Brand Value: $23,024 million
Headquarter City: Toronto
Industry: Banks
Year Formed: 1864

Founded as the Halifax Merchants Bank, RBC took the name Royal Bank of Canada as it slowly expanded across the country. Today, it is one of the world's largest banks and offers personal and commercial banking, wealth management, insurance, investor services, and capital markets products and services. It currently employs more than 84,000 full and part-time employees serving more than 16 million clients in Canada, the US, and 34 other countries. RBC achieved record financial returns in 2018, with net income up eight percent to $12.4 billion. It credits its success to client centricity, employee empowerment, and a focus on innovation and customer experience. The brand also stresses inclusivity, as 45 percent of its executives are women, compared with 18 percent for banks globally. RBC actively supports numerous community and social initiatives, such as its RBC Emerging Artists program and its RBC Future Launch program, which is designed to empower Canadian youth. The bank also has one of the longest-standing partnerships with the Canada Olympic Team, sponsoring the organization since 1947.

TD
Parent Company: Toronto-Dominion Bank
Brand Value: $20,104 million
Headquarter City: Toronto
Industry: Banks
Year Formed: 1855

The Toronto-Dominion Bank, as it was once known, is the second largest bank in Canada, with more than 85,000 employees, 59,000 of whom work in Canada. It oversees $1.4 trillion in assets for 26 million customers mostly in the US and Canada. Some of its many sub-brands include TD Canada Trust, a Canadian retail bank; and TD Ameritrade, a popular online investing platform. TD focuses on being the “Better Bank” and in recent years has made significant investments in digital technology to improve the customer experience. This effort has paid off with a record year in 2018 that saw earnings rise eight percent to over $11 billion.

Bell
Parent Company: BCE, Inc.
Brand Value: $13,318 million
Headquarter City: Montreal
Industry: Telecom providers
Year Formed: 1880

Alexander Graham Bell was Scottish-born but did much of the work for the invention of the telephone at his home in Brantford, Ontario. After patenting the invention—a saga in its own right—he created the Bell System, of which Bell Canada was a part. The subsequent history of Bell’s expansion reflects Canada’s diverse geography, and its parent company today is Canada’s largest communications provider. As of the second quarter of 2019, it had a total of more than 18.6 million subscribers, including over 9.6 million wireless customers, including over 9.6 million wireless customers, 3.4 retail internet subscribers, and 2.7 million retail TV subscribers. It is currently expanding its fiber network rapidly with annual investments of $4 billion. On its softer side, Bell is known for Bell Let’s Talk, a wide-ranging effort to bring awareness, acceptance, and treatment of people suffering with mental illness. Bell has also been a Lead Sponsor of the Toronto International Film Festival since 1995.

Scotiabank
Parent Company: Bank of Nova Scotia
Brand Value: $9,346 million
Headquarter City: Toronto
Industry: Banks
Year Formed: 1832

Scotiabank describes itself as Canada’s leading international bank with major operations in the US, Canada, the Caribbean, and Latin America. Founded in 1832 as the Bank of Nova Scotia, it held its first shareholder’s meeting in a coffee house in Halifax. The bank spent much of the 19th and early 20th centuries expanding across Canada and internationally. Today, Scotiabank operates in 25 countries on four continents, offering its 25 million customers a range of services, including personal banking, wealth management, and corporate and investment banking. In a financial world plagued by volatility, Scotiabank delivered record earnings of $9.1 billion in 2018, up 16 percent year over year.
Lululemon
Parent Company: Lululemon Athletica Inc.
Brand Value: $7,578 million
Headquarter City: Vancouver
Industry: Apparel
Year Formed: 1998

Lululemon is a sports apparel company for women and men. It began life as a design and yoga studio, and launched its first store in November 2000. Originally, the brand specialized in yoga clothes for women, but has since expanded to a large range of sports apparel for both genders, including running, cycling, and various other athletic pursuits. Currently it has 440 stores in 14 countries, the bulk of which are in Canada and the United States. Lululemon stores are unique in that they attempt to create a community hub, where people not only get a workout but also exchange ideas about healthy living, mindfulness, and living a hopeful and optimistic life. Currently, Lululemon is on a torrid growth streak, with a 24 percent increase in revenue in 2018.

Tim Hortons
Parent Company: Restaurant Brands International Inc.
Brand Value: $6,757 million
Headquarter City: Toronto
Industry: Fast Food
Year Formed: 1964

For 24 seasons, Miles Gilbert “Tim” Horton was a legendary player in the National Hockey League, before parlaying his fame into the first Tim Hortons store. While Horton died in a tragic car accident in 1974, the brand grew to be Canada’s largest quick service restaurant chain, with 4,846 restaurants in 14 countries, serving more coffee than any other restaurant chain except Starbucks. It is particularly ubiquitous in Canada, serving small towns across the country that often lack any other fast food restaurants. While it’s best known for doughnuts, which is welcome in a nation said to consume more of them per capita than any other country, it also serves a full range of soups, sandwiches, and breakfast items. “Tims,” or “Timmies” as it’s known in its home market, is one of the most beloved brands in the country and routinely shows up in popular culture. Its annual Roll Up the Rim to Win contest, first launched in 1986, has become an iconic part of Canadian culture. The brand also has long supported local communities through the Tim Hortons Children’s Foundation (Tim Hortons loved kids), which sends thousands of underprivileged kids to camp every year.

Bank of Montreal
Parent Company: Bank of Montreal
Brand Value: $6,754 million
Headquarter City: Montreal
Industry: Banks
Year Formed: 1817

Founded in 1817, the Bank of Montreal has the distinction of being Canada’s first bank. As a result, it has played a major role in the development of Canada and its financial system. Among other things, it helped finance Canada’s first railroad, telegraph line, the Lachine Canal, hydroelectric plants, and the Canada Pacific Railroad. Today, it is the eighth largest bank in North America, with more than 12 million customers and $774 billion in assets. In many of its communications, the brand leans into its heritage as a builder. While it has offices around the world, the brand’s primary focus is in its home market and six US states.

Rogers
Parent Company: Rogers Communications, Inc.
Brand Value: $6,385 million
Headquarter City: Toronto
Industry: Telecom providers
Year Formed: 1960

Rogers was founded in 1960 by legendary businessman Ted Rogers. Today, it is Canada’s largest provider of wireless communications services and one of its leading providers of cable television, high-speed Internet, information technology, and telephone services to consumers and businesses. Through Rogers Media, the brand also engages in radio and television broadcasting, sports, televised and online shopping, and digital media. Rogers has demonstrated a commitment to supporting Canadian content and programming, investing $679 million in local news, live sports, and multilingual programming in 2018. It also engages in various community initiatives, including the Ted Rogers Scholarship, which has provided $3.5 million in scholarships since 2017, and the Ted Rogers Community Grants program, which donated $2 million to community partners in 2018.
Telus
Parent Company: TELUS Corporation
Brand Value: $5,996 million
Headquarter City: Vancouver
Industry: Telecom providers
Year Formed: 1990

Telus is a diversified telecommunications company that offers a wide range of products and services including voice, TV, Internet, and video. Originally founded as a holding company to divest the state telephone companies of Alberta, it has since grown into a nationwide brand. Currently, Telus has 13.4 million customers, including 9.2 million wireless, 1.9 million Internet, 1.2 million residential, and 1.1 million TV subscribers. Telus practices what it calls “social capitalism,” with the goal of making social improvements rather than strict profit. Under the hashtag #MostGivingCompany, it contributed more than $150 million in 2018, impacting 2 million young people, especially by providing vulnerable youth with phone and Internet services.

Canadian Imperial Bank of Commerce
Parent Company: Canadian Imperial Bank of Commerce
Brand Value: $4,948 million
Headquarter City: Toronto
Industry: Banks
Year Formed: 1867

CIBC was formed via the largest banking merger in Canadian history, when the Canadian Bank of Commerce (founded in 1867) and the Imperial Bank of Canada (founded in 1875) joined forces in 1961. Today, CIBC serves 10 million customers across four business units: Canadian personal and small business banking, Canadian commercial banking and wealth management, US commercial banking and wealth management, and capital markets. CIBC heavily engages in community support initiatives, including the annual CIBC Run for the Cure through a partnership with the Canadian Breast Cancer Foundation. Run for the Cure is Canada’s largest single day, volunteer-led event.

Desjardins
Parent Company: Desjardins Group
Brand Value: $2,807 million
Headquarter City: Levis
Industry: Insurance
Year Formed: 1900

Desjardins is North America’s leading cooperative financial network, offering personal and business services, wealth management, and life and health insurance. In 1900, Alphonse Desjardins, in response to the lack of credit in Quebec, founded the first “caisse populaire,” or credit union, in Levis. Essentially an innovation intended to bring down ruinous interest rates and promote penny savings, caisses populaires embrace the concepts of membership and profit sharing. The brand has steadily expanded over the century mostly in Ontario and Quebec—and is known for its excellent service and credit ratings. Today Desjardins’ 46,000 employees serve 7 million customers and oversee roughly $296 billion in assets under management. Desjardins also engages in various corporate social responsibility activities, including supporting the Desjardins Foundation, which was established in 1970 to contribute to the academic success of young people.

Petro-Canada
Parent Company: Suncor Energy Inc
Brand Value: $3,308 million
Headquarter City: Calgary
Industry: Energy
Year Formed: 1975

Petro Canada has one of the more unique corporate histories in Canada. After the oil crisis of the 1970s, the Canadian government founded it as a crown corporation in 1975 to harness oil resources in Alberta. The resulting company proved successful and expanded into extraction operations across the country. The government began privatizing Petro Canada in 1991, eventually selling its entire stake. The company was eventually purchased by Suncor in 2009. Canadian consumers, however, largely know it through the iconic maple leaf logo that adorns the more than 1,500 locations that provide fuel and convenience products across the country. The brand is also extremely active in sports promotion, having sponsored more than 3,000 Olympic and Paralympic athletes and their families since 1988.
Shaw
Parent Company: Shaw Communications Inc.
Brand Value: $2,750 million
Headquarter City: Calgary
Industry: Telecom providers
Year Formed: 1966

Shaw is a communications brand that operates primarily in western Canada, offering Internet and content services to 3.2 million customers, including 1.9 million subscribers to Shaw Internet and more than 1 million home phone customers. Founded in 1966 to provide cable television services, it connected its first cable customer in 1971. Shaw grew rapidly through the cable TV boom of the 1980s and 90s. Shaw has long been known in Canada as a supporter of children’s causes, primarily through its Shaw Kids Investment Program.

Fido
Parent Company: Rogers Communications Inc
Brand Value: $2,442 million
Headquarter City: Montreal
Industry: Telecom providers
Year Formed: 1996

One of Canada’s more playful brands, Fido offers wireless telecommunications service across Canada. While it is owned by Canadian wireless giant Rogers Communications, it retains an entirely separate brand and customer service operations. Throughout its history, Fido has used innovative marketing strategies to take on its larger rivals, including being the first to offer unlimited data plans in major cities. “Fido” is a common name for dogs in both French and English, so not surprisingly, the brand has a doghouse logo, often uses dogs in its communications, and currently operates under the slogan, “Go Get It.”

Sun Life
Parent Company: Sun Life Financial Inc.
Brand Value: $2,385 million
Headquarter City: Toronto
Industry: Insurance
Year Formed: 1865

Sun Life offers a range of global financial services to both individual and corporate clients—though it is primarily known for insurance. As a whole, it is one of the largest insurance companies in the world, with operations in 26 countries worldwide, though the majority of its business is in Canada and the US. Founded in 1865 in Montreal, the company—not without controversy—moved its headquarters to Toronto after Quebec’s adoption of the Charter of the French Language. In its communications, the brand often finds ways to play on its name, for example, promising to help people live “brighter lives under the sun.” Currently Sun Life currently has 37,000 employers, 112,810 advisors, and $951 billion in assets under management.

Manulife
Parent Company: Manulife Financial Corporation
Brand Value: $2,325 million
Headquarter City: Toronto
Industry: Insurance
Year Formed: 1887

Founded as the Manufacturers’ Life Insurance Company in 1887, Manulife today is Canada’s largest insurance company. In addition to insurance, Manulife offers financial advice and wealth and asset management for individuals, groups, and institutions. Manulife is slightly unusual in that it operates as two distinct brands: John Hancock in the United States and Manulife in the rest of the world. Among its more unique products is Manulife Vitality, which rewards customers for making healthy choices in their lives. By the numbers, Manulife has 36,000 employees, 28 million customers, and $1.1 trillion in assets under management. Manulife is currently experiencing a period of accelerating growth with core earnings up 23 percent in 2018. Its philanthropic efforts often promote health, including its Cooking Towards Independence Program, which provides cooking workshops for youth leaving foster care.
Canada Goose
Parent Company: Canada Goose Holdings Inc.
Brand Value: $2,199 million
Headquarter City: Toronto
Industry: Apparel
Year Formed: 1957

If you’ve ever seen one of iconic, red, Snow Mantra parkas worn in Antarctica or by climbers on Mt. Everest, you’ve seen a Canada Goose product. With all its products manufactured in Canada, it is an iconic brand in its home country and practically a uniform for fashionable city youth. Today, Canada Goose makes a wide range of outdoor clothing, primarily aimed at a luxury audience. It is currently on a torrid pace of growth as its products have gone international, with revenue up 40.5 percent in 2019. Canada Goose also has a growing retail presence with 14 stores in upscale locations in major cities.

National Bank
Parent Company: National Bank of Canada
Brand Value: $2,066 million
Headquarter City: Montreal
Industry: Banks
Year Formed: 1859

National Bank is one of the country’s six largest banks and the market leader in Quebec. Its 23,450 employees serve 2.7 million clients across 428 branches and 937 ATMs, with $262 billion in total assets under management. While the name says “National,” the bank was founded in 1859 in Quebec by francophone businessmen eager to have a bank under local control. Today, the bank is one of the most profitable banks in the world based on return on equity. On a sophisticated note, National Bank has acquired the largest corporate collection of Canadian art. It consists of more than 7,000 works of art, which are displayed in its offices and branches across the country. The brand also participates extensively in corporate social responsibility initiatives and is a founding signatory of the United Nations’ UN Principles for Responsible Banking.

Metro
Parent Company: Metro Inc.
Brand Value: $1,698 million
Headquarter City: Montreal
Industry: Retail
Year Formed: 1947

Metro is a food and pharmacy retailer that operates primarily in Ontario and Quebec. It currently has 947 food stores and 669 drugstores, directly or indirectly employing almost 90,000 people. Metro was founded as Magasins Lasalle Stores ltée in 1947, when several independent grocers decided to form a buying group. More grocers joined, and in 1957, it adopted the name Metro. Since then, it has grown largely by acquisition, including the most recent purchase of the Jean Coutu Group of pharmacy stores in 2017, which positions Metro as the largest private employer in Quebec. It has also recently purchased MissFresh, which specializes in delivering ready-to-cook meals. Metro supports local communities through food donations and its Green Apple program, which promotes healthy eating habits.

Dollarama
Parent Company: Dollarama Inc.
Brand Value: $1,591 million
Headquarter City: Montreal
Industry: Retail
Year Formed: 1992

Dollarama is a value retailer founded in 1992 by third generation retailer Larry Rossy. Value retail is a popular category in the Americas, where smaller stores offer a range of grocery and non-grocery items typically at fixed price points (in Dollarama’s case, those range from $.82 to $4.00). Like most dollar stores, Dollarama offers a broad range of food, general merchandise, white label goods, and seasonal items, generally at an excellent value. It currently operates over 1,000 stores across Canada, generating revenues of $3.5 billion over the last year. The brand also added a new online store in 2019, which differs from its physical counterpart by selling in bulk.
Leveraging music to drive an emotional connection

Emotions drive better brand connections, and brands with higher affinity are stronger and more meaningfully different. That’s why some advertising purposefully aims to strengthen and build greater emotional connections with consumers.

So, how can we do this? There are many ways in which ads can generate strong emotional engagement, but music can be an especially strong enhancement. While including music in an ad does not automatically guarantee success, if used correctly, it can affect every aspect of an ad’s performance. Music has many roles. It can gain attention and create a mood and tone; it can also be used to punctuate and build involvements through volume and pace.

Whether the music is well-known or an original jingle, upbeat or laid back, a focal point or supporting element, all can have a powerful effect on the ad itself. The more connected and integral the music is to the message and overall story, the better success it will have in driving an emotional connection. Canadian brands that do this well are Canadian Tire and Cineplex, both of which exhibit exceptionally strong affinity from consumers.

Is it worth investing in brand differentiation?

Canadians are twice as likely to say differentiated brands are their first choice. They are also much more proud to use them.

So, why not just pick a differentiating point and invest in it? Unfortunately, it is not that easy—not even with big budgets. Of the brands in the Top 40, only one in four are considered different.

Meaningful differentiation starts with an ownable, tangible brand promise that can build an emotional connection with consumers. Great examples are Lululemon and Canada Goose. An excellent reputation, clear purpose, and good citizenship can also help. Good examples here are Tim Hortons, Cineplex, and Canadian Tire. Brands that are clearly differentiated, but are not meaningful for clients, need to ensure the market understands why their promise can meet their needs and strengthen love.
**Shoppers Drug Mart**

*Parent Company:* Loblaw Companies Limited  
*Brand Value:* $1,447 million  
*Headquarter City:* Toronto  
*Industry:* Retail  
*Year Formed:* 1962

Shoppers Drug Mart is Canada’s leading retail pharmacy chain, with more than 1,300 stores across the country. The brand operates under an Associate Concept in which pharmacists have an ownership stake in the stores they operate. Like many North American drug stores, Shoppers Drug Mart early abandoned its soda counters and now focuses on selling healthcare services along with health and beauty products and a range of general merchandise. The brand also has 49 medical clinic pharmacies, smaller stores located inside clinics and hospitals, and five luxury beauty locations. Since 2013, Shoppers Drug Mart has been owned by retail holding company Loblaw Companies Limited, which has introduced joint loyalty programs and its own branded products. In Quebec, the brand is known as Pharmaprix.

**Canadian Tire**

*Parent Company:* Canadian Tire Corporation Limited  
*Brand Value:* $1,319 million  
*Headquarter City:* Toronto  
*Industry:* Retail  
*Year Formed:* 1922

As ‘Canada’s store,’ Canadian Tire is an institution unique to the country, selling a curious—to outsiders—mix of tires, auto repair, automotive products, apparel, hardware, sports and recreation, home appliances, and seasonal products. Some of its stores also sell toys and grocery items—and there is even a Canadian Tire Bank. Affiliate brands include athletics stores, clothing retailers, gas stations, and a real estate investment trust, among others. The brand enjoys a 98 percent instant recognition among consumers in its home market, where its loyalty program issues “Canadian Tire Money” for purchases, which has been accepted by other retailers as well. Canadian Tire supports many community initiatives, especially through its Jumpstart Charities, which is dedicated to helping children overcome barriers to sports and recreation. Jumpstart has benefited over 1.5 million kids since 2005. In August 2019, Canadian Tire acquired Party City’s Canadian business, a move designed to establish the company as Canada’s premier party supply destination.

**Koodo Mobile**

*Parent Company:* TELUS Corporation  
*Brand Value:* $1,278 million  
*Headquarter City:* Vancouver  
*Industry:* Telecom providers  
*Year Formed:* 2008

Koodo Mobile is a “flanker” brand of Telus, offering prepaid, postpaid, and home wireless phone service. Koodo typically targets younger, cost-conscious consumers with a variety of budget offerings, including prepaid data, no fixed contracts, free data pausing, and certified pre-owned phones. However, because it runs on the Telus network, it also offers some of the best overall coverage in Canada. Its name is derived from the Greek word “kudos,” which means ‘credit’ or ‘glory,’ a fitting appellation as Koodo has often topped customer service ratings for Canadian wireless brands. BrandZ data also shows it to be the most different of all telecom provider brands.

**Crown Royal**

*Parent Company:* Diageo Plc  
*Brand Value:* $1,252 million  
*Headquarter City:* Toronto  
*Industry:* Alcohol  
*Year Formed:* 1939

With probably the most dramatic origin story of any top Canadian brand, Crown Royal was created to commemorate the arrival of King George VI and Queen Elizabeth when they became the first reigning monarchs to visit Canada. According to legend, after trying more than 600 blends, distiller Seagrams bottled its smooth product in a cut-glass decanter with its iconic purple bag and delivered ten cases of the whisky to the royal train. Today, Crown Royal is still distilled on the shores of Lake Winnipeg from overwhelmingly Canadian-sourced ingredients. It is also easily the most popular Canadian whisky in the world.
Great-West Life

Parent Company: Great-West Lifeco Inc
Brand Value: $1,186 million
Headquarter City: Winnipeg
Industry: Insurance
Year Formed: 1891

Great-West Life is an insurance brand that was founded in Winnipeg in 1891. In April 2019, its parent company decided to combine it, Canada Life, and London Life under the Canada Life brand. The combined entity will consolidate 13 million customers in Canada, offering life insurance, health insurance, investment, retirement savings and reinsurance. The brand will also have a large presence in Europe. In the past year, Great-West supported over 700 community support initiatives across Canada, including the Canadian Foundation for AIDS Research (CFAR).

* Great West Life is transitioning to Canada Life

Air Canada

Parent Company: Air Canada
Brand Value: $1,146 million
Headquarter City: Montreal
Industry: Airlines
Year Formed: 1937

With its vast distances and dispersed population, air travel has long been an important part of life in Canada. With 30,000 employees, Air Canada holds the distinction of being the largest carrier both inside Canada and in the international market to and from the country. It carries nearly 51 million passengers every year to 220 destinations on six continents. The brand began life as Trans-Canada Airlines in 1937, though its initial flight ironically was a transborder one between Vancouver and Seattle. By 1964, it had become Canada’s national airline and changed its name to Air Canada. The brand was fully privatized in 1989 and became a founding member of the Star Alliance in 1997. Thanks to fuel prices and global instability, times are challenging for airlines, yet Air Canada has nonetheless achieved nine consecutive years of revenue growth.

Real Canadian Superstore / Atlantic Superstore

Parent Company: Loblaw Companies Limited
Brand Value: $1,085 million
Headquarter City: Ontario
Industry: Retail
Year Formed: 1977

Real Canadian Superstore (Atlantic Superstore in the Atlantic provinces) is a discount retailer that comes in a variety of sizes ranging from regular supermarkets to giant hypermarkets. While sometimes compared to the American Walmart, Real Canadian Superstores typically devote more of their floor space to groceries, though the stores also offer electronics, housewares, clothing, and sometimes photo finishing and pharmacy services. Not surprisingly, many of them offer a range of modern conveniences such as delivery, self-checkout, and click-and-collect services. There are currently 117 branded Real Canadian Superstores and 51 Atlantic Superstores.

Intact Insurance

Parent Company: Intact Financial Corporation
Brand Value: $1,024 million
Headquarter City: Toronto
Industry: Insurance
Year Formed: 1809

Intact Insurance is the largest home, auto, and business insurance company in Canada, with more than 4 million customers. The brand traces its roots to the oldest insurance company in the country, the Halifax Fire Insurance Association, which was founded in 1809. Intact has grown aggressively in recent years, primarily through a series of acquisitions. In its communications, it stresses its desire to be one of the country’s most respected companies, working under a philosophy called “Living Our Values” which stresses the belief that “Insurance is not about things. Insurance is about people.” Among its many charitable endeavours, Intact supports the Intact Centre on Climate Adaptation™ (ICCA), which focuses on protecting Canada from the financial, physical, and social impact of climate change.
SECTION 3 - BRAND PROFILES

Winners

Parent Company: TJX Companies, Inc.
Brand Value: $945 million
Headquarter City: Mississauga
Industry: Retail
Year Formed: 1982

Winners is an “off-price” retailer. This unique concept is generally known for providing brand-name clothing and home fashions at a fraction of their usual cost. Winners attracts both everyday bargain hunters as well as more affluent shoppers who prefer not to pay full price. It is known for its “treasure hunt” experience, in which high-end items are hidden among less exclusive ones. That said, Winners is not a traditional discounter, instead providing excellent value rather than cheap products. Because Winners features a rapidly changing assortment, it does not offer online shopping and is a lightly digitized brand. Nonetheless, in a challenged sector, off-price retail is a rapidly growing category. As of 2018, its parent company had 4,306 stores and 270,000 employees, growing its revenue six percent year over year and adding a net total of 236 stores.

Rona

Parent Company: Lowe’s Companies, Inc
Brand Value: $699 million
Headquarter City: Boucherville
Industry: Retail
Year Formed: 1939

Rona is a major home improvement chain with a large focus on Quebec. It operates more than 400 hardware and home improvement stores in Canada in a variety of formats, including warehouse-style Réno-Dépôt and Rona Home & Garden. The brand traces its roots to 1939 when a number of hardware stores came together in an alliance known as Les Marchands en Quincaillerie. The grouping was rebranded as RO-NA, a reference to the first names of two of the founding members. Today, Rona focuses both the DIY and contractor segments with a large variety of tools, hardware, building supplies, and so on. In 2016, Rona was purchased by American chain Lowe’s, which has since announced it would rebrand a number of stores under the Lowe’s name. Among its many initiatives to support local communities, Rona has been donating supplies to Habitat for Humanity since 2007.

Aritzia

Parent Company: Aritzia Inc.
Brand Value: $684 million
Headquarter City: Vancouver
Industry: Apparel
Year Formed: 1984

Aritzia is an upscale women’s clothing store with a unique approach to fashion. The company develops its own in-house brands, including Wilfred, Wilfred Free, Tna, Babaton, Little Moon, The Constant, and Sunday Best. Each has its own identity and creative team, providing the brand flexibility to move with trends and retain customers from different age groups. Aritzia also adds a small number of outside brands, like Nike and Levi’s, that reflect its values and quality. It sells everything in its own aspirational, individually designed stores, giving the brand complete control over the customer experience. The idea is to bridge the gap between teen fashion and luxury, delivering quality clothes at a good value. Aritzia currently has 67 boutiques in Canada and 25 in the United States—and also sells through aritzia.com.

Foodland

Parent Company: Empire Company Ltd.
Brand Value: $481 million
Headquarter City: Stellarton
Industry: Retail
Year Formed: 1985

Foodland is a grocery retailer common in Ontario and the Atlantic provinces. Wholly owned by Empire Company Ltd., Foodland has 219 stores, which stock a standard variety of food, meat, produce, bakery, and other similar items. Foodland stores are more often found in rural or non-urban settings.
Cineplex
Parent Company: Cineplex Inc.
Brand Value: $464 million
Headquarter City: Toronto
Industry: Entertainment
Year Formed: 1979

Headquartered in Toronto, Cineplex operates 164 theatres with 1,676 screens across the country, welcoming approximately 70 million guests annually through a variety of different brands. Its history can be said to go back to a seminal moment in Canadian entertainment history, when Adolph Zukor founded the Famous Players Film Corporation (whose lineal operations Cineplex purchased in 1975). In addition to being Canada’s largest film exhibitor, Cineplex also offers digital commerce through Cineplexstore.com, cinema media, digital media, and WorldGaming.com, a popular eSports platform. Often recognized for its excellent corporate culture, Cineplex has roughly 13,000 employees in Canada and the United States.

Molson Canadian
Parent Company: Molson Coors Brewing Company
Brand Value: $460 million
Headquarter City: Montreal
Industry: Alcohol
Year Formed: 1959

The Molson Brewery traces its roots far back into colonial Canada, when John Molson founded the oldest brewery in North America in 1786. The Molson Canadian brand, however, was first brewed in 1959 and has since grown to become one of Canada’s most iconic beers. It is a light lager, brewed entirely of Canadian ingredients, and known for its crisp, clean taste. Like many established beers in Canada elsewhere, it faces increased competition from craft startups, which are a fast-growing section of the country’s otherwise lightly declining beer industry. However, Molson Canadian ranks highly in Brand Contribution, a key metric that helps cushion brands from fads and changes in public tastes.

Labatt Blue
Parent Company: Anheuser-Busch InBev SA/NV
Brand Value: $457 million
Headquarter City: Toronto
Industry: Alcohol
Year Formed: 1847

Labatt Blue is a pilsner lager beer brand originally brewed by Labatt Breweries of Canada. The brand was introduced in 1951 in Ontario. Five years later it was introduced in Manitoba and, thanks to its signature blue label and support of the Winnipeg Blue Bombers football team, it received the nickname “Blue,” which stuck. Since then, it has grown into one of Canada’s favourite beers. Today, the brand brews the equivalent of more than 350 million bottles, most of which is drunk in Canada. Canadians know the brand as an enthusiastic sponsor of hockey, baseball, and Canadian football league teams.

President’s Choice
Parent Company: Loblaw Companies Limited
Brand Value: $449 million
Headquarter City: Toronto
Industry: Food
Year Formed: 1984

One of the more unique brands in the country, President’s Choice is a premium, private-label portfolio of products belonging to Loblaw Companies Limited. As such, it primarily appears in Loblaw stores, including Shoppers Drug Mart and Atlantic Superstores. In some ways it was an accidental brand, created in 1984 for a higher-end coffee offering, but its combination of high quality and great value proved a hit with Canadian consumers. Today, PC, as it’s also known, encompasses a vast range of food, baby, and household products—everything from diapers and organics to ready-made dinners and wine glasses. President’s Choice also operates the President’s Choice Children’s Charity, which is the nation’s largest charitable funder of school breakfast programs.
Sobeys
Parent Company: Empire Company Ltd
Brand Value: $392 million
Headquarter City: Stellarton
Industry: Retail
Year Formed: 1907

Founded in Stellarton, Nova Scotia as a meat delivery business, by 1924, Sobeys’s product range had expanded to a full line of groceries. Today, Sobeys operates over 1,500 stores—plus 350 retail fuel locations—in all 10 provinces across its various retail banners, employing approximately 123,000 people. It is known as a modestly upscale supermarket chain, with a full range of grocery and household products. The brand also operates Sobeys Express, a companion to gas stations that differentiates itself from other convenience stores by offering fresh produce and bakery items. The brand has a long-standing partnership with the Special Olympics and has recently announced that it will eliminate plastic bags amid growing consumer concerns about their impact on environment.

Super C
Parent Company: Metro, Inc.
Brand Value: $381 million
Headquarter City: Montreal
Industry: Retail
Year Formed: 1982

Along with its sister brand Food Basics, Super C is a no frills, discount retailer. Tracing its roots to a company founded in 1982, it operates 97 stores and employs more than 6,000 people, primarily in Quebec. Super C competes primarily on price and value, offering discounts if customers are not satisfied with freshness or if an advertised item is out of stock. Super C also maintains a portfolio of low-price, generic brands.

Jean Coutu
Parent Company: Metro, Inc.
Brand Value: $367 million
Headquarter City: Montreal
Industry: Retail
Year Formed: 1969

Founded in 1969 by pharmacist Jean Coutu, the brand grew around a store concept in which drugs, healthcare products, and other merchandise were sold at discount prices with good customer service and extended business hours. Over the years, the Jean Coutu Group came to embody Quebec’s entrepreneurial spirit, expanding to become North America’s largest pharmacy retailer and frequently landing on lists of the province’s most admired employers. Last year, Jean Coutu was acquired in a mega-merger by Metro Inc., which has promised to unify the brand’s operations with its other pharmacies. Today, Jean Coutu has over 20,000 employees working in more than 400 stores across Quebec, New Brunswick, and Ontario.

Food Basics
Parent Company: Metro, Inc.
Brand Value: $339 million
Headquarter City: Toronto
Industry: Retail
Year Formed: 1995

Food Basics was originally a creation of A&P Canada, which wanted a low-cost alternative to compete with Loblaw’s successful No Frills stores. From the beginning, the brand was designed to cut costs to a minimum to be able to offer customers products at an excellent value. Among other things, Food Basics did not offer plastic bags, giving customers open boxes instead. Like its sister brand, Super C, Food Basics competes primarily on price and value, offering discounts if customers are not satisfied with freshness or if an advertised item is out of stock. In recent years its parent company Metro Inc. has remodeled its stores to have them more closely resemble the Super C format. Food Basics is a growing brand, with over 131 stores, located entirely in Ontario.
An enviable global brand: Canada scores #1 as a place people would like to live

In addition to measuring the value of brands from Canada, we can also assess the strength of Brand Canada itself. The Best Countries ranking does exactly that, comparing perceptions of countries around the world held by a broad spectrum of consumers. Developed by WPP and VMLY&R’s BAV Group, it surveys 21,000 people across 36 countries to understand how a nation’s policies, politics, and people are affecting its perceived standing in the world. It then ranks countries against a series of attributes—such as education, culture, and openness to business—all of which have the potential to drive trade, travel, and investment.

Given that the Best Countries ranking speaks to global perceptions, it should not be surprising that people living in a country can sometimes be surprised at the ratings that are given. Canadians should have no such worries. If they’re feeling their country is stepping out on the world stage in a positive way, the rankings confirm it. At #3 in 2018, Canada stands out on a vast range of metrics, from its business climate and global citizenship to its job market and high quality of life.

Part of this certainly has to do with how Canada has responded to a world in which economies are volatile and politics have often turned dark and authoritarian. While many countries have declined liberal immigration policies, Canada has remained one of the most open and welcoming societies in the world. In 1971—yes, that far back—the country embraced a policy of multiculturalism.

In addition, the country has been remarkably stable politically and has experienced almost none of the global trend towards nationalism and, worse, nativism. Its discourse is largely unaffected by the turmoil, fake news, and divisive propaganda that has upended traditional norms in many countries. To many, Canada has become a beacon of sanity in a mad mad world.

If you’re looking for a single metric that encapsulates Canada’s global reputation, it’s that people consider it, more than any other country, a place they’d want to live. They value it for its healthy politics, excellent healthcare, friendly people, good job market, enviable education system, and all around safety and security.

Of course, we have plenty of data points that confirm this—and the real estate market most of all. Across Canada, and especially in major population centers, where 82 percent of Canadians live, people are putting their money where their mouths are. International buyers have parked billions of dollars into the country’s housing market—which has had major consequences for people living there—some of them unwelcome. Millennials are only half as like to own homes as their same-age counterparts did in 1975. The popular TV show Love It or List It, which is shot largely in Toronto, draws gasps from international audiences, who are stunned to see ordinary row homes in the city selling for over a million dollars.

Faced with soaring housing costs for their citizens, a number of Canadian cities have either implemented or are considering so-called empty homes taxes to discourage those overseas from buying up and then not using real estate in the country. Whether this will work is anyone’s guess, but this “problem” certainly demonstrates how attractive the country is to those who live outside it.

In addition, the Best Countries rankings include questions that assess a country based on 65 different attributes. It’s a testimony to Canada’s excellent reputation that on 34 of these measures, or comfortably more than half, it ranks in the top 10 of all countries. On seven of them, it ranks first.

Canada by the numbers

The Best Countries rankings include questions that assess a country based on 65 different attributes. It’s a testimony to Canada’s excellent reputation that on 34 of these measures, or comfortably more than half, it ranks in the top 10 of all countries. On seven of them, it ranks first.

Where Canada ranks

1. Not corrupt
2. Is a place I would live
3. Politically stable
4. Respects property rights
5. Transparent business practices
6. Trustworthy
7. Well-developed public education system

Part of this certainly has to do with how Canada has responded to a world in which economies are volatile and politics have often turned dark and authoritarian. While many countries have declined liberal immigration policies, Canada has remained one of the most open and welcoming societies in the world. In 1971—yes, that far back—the country embraced a policy of multiculturalism.

Best Countries also compiles its metrics into nine overarching categories. Of these, Canada ranks number one in the world for Quality of Life. Global citizens perceive Canada as a safe and stable place, with good job security and excellent education. It is also seen as family friendly. In fact, the only knock on it—and one where global and Canadian perceptions likely converge—is that it’s not particularly affordable. High housing costs of course play into that, not to mention $2.75/liter milk, and family data plans that can cost hundreds of dollars a month. But all in all, the world feels you pretty much can’t beat life in Canada.
## Canada rankings

<table>
<thead>
<tr>
<th>Category</th>
<th>Score (out of 10)</th>
<th>Rank (out of 80 countries)</th>
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<tr>
<td>Adventure</td>
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<td>Citizenship</td>
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<td>Cultural Influence</td>
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<tr>
<td>Movers</td>
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The value of strong national brand attributes

Impressions of a country matter to brands because the feelings people have about a place are projected on to the brands that come from there. This, in turn, affects what people are likely to buy, and how much they’re willing to pay for it.

We certainly will pay more for wine and cheese from France than we do, in general, from Portugal or Chile. Likewise, if a new technology product comes from Silicon Valley, we’re more open to its consideration and purchase. We travel to have fun in Brazil and to soak up food and culture in Italy. Each country’s brand influences a product’s perception, especially if it is new or unusual to us.

And just as countries perform an ambassadorial role for the brands they’re home to, brands also perform the same role for their home country. Samsung has helped reshape international views about South Korea, for instance, and Sony has done the same for Japan and Japanese products.

The reason American technology products and services sell so well around the world is because companies like Apple, Facebook, and Google have profoundly changed how people live.

Canada strengths, a selection (ranking out of 80 countries):

- #1 Quality of life (category)
- #1 Not corrupt
- #1 In a place I would live
- #1 Politically stable
- #1 Respects property rights
- #1 Transparent business practices
- #1 Trustworthy
- #1 Well-developed public educational system

Canada’s weaknesses (ranking out of 80 countries):

- #79 Has a rich history
- #76 Religious
- #74 Cheap manufacturing costs
- #71 Different
- #54 Unique
- #52 Affordable
- #42 Heritage
- #39 Momentum

How Do We Measure a Country?

The Best Countries 2018 ranking incorporates the views of more than 21,000 individuals surveyed in 56 countries in four regions: the Americas, Asia, Europe, and the Middle East and Africa. These people included a high proportion of “informed elites,” or college-educated people who keep up with current affairs, along with business decision makers and members of the general public.

Respondents are asked about the 80 countries that feature in the 2018 ranking: between them, these countries account for about 95 percent of global Gross Domestic Product, and represent more than 80 percent of the world’s population.

People surveyed for Best Countries are asked how closely they associate 65 attributes with a range of countries. These attributes are then grouped into eight categories, which are used to calculate the Best Countries ranking:

The 8 elements of a country’s brand

- Adventure: A country is seen as friendly, fun, has a pleasant climate, and is scenic or sexy.
- Heritage: The country is culturally accessible, has a rich history, has great food, and many cultural attractions.
- Citizenship: It cares about human rights, the environment, gender equality, is progressive, has religious freedom, respects property rights, is trustworthy, and political power is well distributed.
- Open for business: Manufacturing is inexpensive, there’s a lack of corruption, the country has a favourable tax environment, and transparent government practices.
- Cultural influence: It is culturally significant in terms of entertainment, its people are fashionable and happy, it has an influential culture, is modern, prestigious and trendy.
- Power: It is a leader, is economically and politically influential, has strong international alliances and a strong military.
- Entrepreneurship: It is connected to the rest of the world, has an educated population, is entrepreneurial, innovative, and provides easy access to capital. There is a skilled labour force, technological expertise, transparent business practices, well-developed infrastructure, and a well-developed legal framework.
- Quality of life: There’s a good job market, affordable living costs, it’s economically and politically stable, family-friendly, safe, has good income equality and well-developed public education and health systems.

Each of the eight measures is given a weighting in its contribution to the total score for each country, as follows.
Top of the world

#1 Switzerland
#2 Japan
#3 Canada
#4 Germany
#5 United Kingdom
#6 Sweden
#7 Australia
#8 United States
#9 Norway
#10 France

Switzerland tops the ranking as it is highly regarded for its citizenship, openness for business, and for providing an environment that encourages entrepreneurship. It offers its citizens a high quality of life and is quite culturally influential, with more Nobel prize winners per capita than most nations.

Japan is seen as tops for entrepreneurship. Canada is best for quality of life, while Germany has a similar profile to the UK, though Germany is stronger on entrepreneurship. The United States scores as the most powerful nation, but its low rating as open for business, presumably driven by its wrangling on trade and harder immigration policies, drops it down in the rankings.

Being the best they can be

When it comes to positive attributes, Brand Canada has an embarrassment of riches. Canadian brands can make most of what their country brand already represents in the minds of international consumers, and at the same time contribute to what “Made in Canada” means. Brand Canada uses their country of origin to promote their country when they align with its values and the positive feelings already associated with that country.

A focus on the following attributes will ring true to international consumers:

**Trust**
Canadian banks can rejoice. When it comes to trust, an incredibly important characteristic in financial services, they can rely on Canada’s number one ranking by this measure.

Interestingly, however, BrandZ data shows that Canadians themselves are not terribly trusting in their banks. Trust is an important part of building loyalty, so whether brands are expanding overseas or hoping to stave off disruptive upsstarts, delivering on your promises is always table stakes.

**Culture**
Amy Badun, in her article “The late bloomer: Canada’s cultural rise and how brands can keep up,” notes there’s a huge number of culturally influential people who are Canadian, including Drake, The Weeknd, Celine, the Ryan, Justin Bieber, Seth Rogen, Mike Myers, and even Keanu Reeves, who grew up in Toronto. The country has also recently seen a lot of success in sports, with the Toronto Raptors winning the NBA championship and Bianca Andreescu capturing the US Open title. Canada’s brands certainly have an opportunity to celebrate Canadian culture, especially within the country. People take pride in native sons and daughters running high.

**Purpose**
On a wide range of measures, Canada is seen as a leading moral voice among nations. While this doesn’t translate easily to marketing activities, it does lend credibility to brands seeking to emphasize how their actions benefit the world as a whole. Canadian brands would hardly be stepping too far outside their lanes if they commented on equality, social justice, environmental concerns, and other issues of concern to their customers. The only caveat is that the stance taken must resonate with the brand itself—otherwise the effort could seem disingenuous.

**Going global**
Above all, Canada’s excellent global reputation should be encouraging to any brand looking to set its sights outside its borders. Brands like Tim Hortons, Canada Goose, and Artizia—all of which are expanding overseas—should benefit from the trust, good will, and openness the country has engendered around the globe. Brand Canada is clearly a welcome asset, and no brand should be shy to use it.

**Difference**
While Canada ranks poorly on nearly all measures of uniqueness, that doesn’t mean it has to. Top Canadian brands are also seen as largely undifferentiated, but where some see a problem, smart brands always see an opportunity. A number of smaller Canadian brands outside the ranking, as well as some on the ranking, like lululemon and Artizia, are currently seeking breaking things up. The key is learning innovation and doing something new. It can involve digital innovation, but it can also be as simple as taking a different approach or removing a pain point in customer’s lives.

**About Best Countries**
Best Countries was developed by WPP’s VMLY&R BAV Group, and The Wharton School of the University of Pennsylvania, with U.S. News & World Report. The ranking is revealed each year at the World Economic Forum in Davos, the world’s largest gathering of global leaders and heads of industry and influence. For more detail visit: https://www.usnews.com/news/best.
Introduction

The brands that appear in this report are the most valuable Canadian brands. They were selected for inclusion in the BrandZ™ Top 40 Most Valuable Canadian Brands 2019 report based on the unique and objective BrandZ™ brand valuation methodology that combines extensive and ongoing consumer insights with rigorous financial analysis.

The BrandZ™ valuation methodology can be uniquely distinguished from its competitors by the way we use consumer viewpoints to assess brand equity, as we strongly believe that how consumers perceive and feel about brands is critical to success or failure. We conduct worldwide, ongoing, in-depth quantitative consumer research, and build up a global picture of brands on a category-by-category and market-by-market basis.

Globally, our research covers 3.7 million consumers and more than 165,000 different brands in over 50 markets. This intensive, in-market consumer research differentiates the BrandZ™ methodology from competitors that rely only on a panel of “experts”, or purely on financial and market research.

Before reviewing the details of the methodology, consider these three fundamental questions: why is brand important; why is brand valuation important; and what makes BrandZ™ the definitive brand valuation tool?

Importance of brand

Brands embody a core promise of values and benefits consistently delivered. Brands provide clarity and guidance for choices made by companies, consumers, investors and other stakeholders. Brands provide the matrix we need to navigate the consumer and brand landscape.

At the heart of a brand’s value is its ability to appeal to relevant customers and potential customers. BrandZ™ uniquely measures this appeal and validates it against comprehensive performance. Brands that succeed at delivering the greatest attraction power are those that are:

• Meaningful. In any category, these brands appeal more, generate greater emotion, and meet the individual’s expectation and need.

• Different. These brands are unique in a positive way and set the brand apart from the crowd for the benefit of the consumer.

• Salient. These brands spontaneously come to mind as the brand of choice for key needs.

Importance of brand valuation

Brand valuation is a metric that quantifies the worth of these powerful but intangible corporate assets. It enables brand owners, the investing community, and others to evaluate and compare brands and make faster and better-informed decisions.

Brand valuation also enables marketing professionals to quantify their achievements in driving business growth with brands, and to celebrate these achievements in the boardroom.

Distinction of BrandZ™

BrandZ™ is the only brand valuation tool that peels away all of the financial and other components of brand value and gets to the core: how much brand alone contributes to corporate value. Yes, there, what we call Brand Contribution, differentiates BrandZ™.

The valuation process

Step 1: Calculating Financial Value

Part A

We start with the corporation. In some cases, a corporation owns only one brand. All Corporate Earnings come from that brand. In other cases, a corporation owns many brands. And we need to apportion the earnings of the corporation across a portfolio of brands.

To make sure we attribute the correct portion of Corporate Earnings to each brand, we analyze financial information from annual reports and other sources. This analysis yields a metric we call the Attribution Rate.

We multiply Corporate Earnings by the Attribution Rate to arrive at Branded Earnings, the amount of Corporate Earnings attributed to a particular brand. If the Attribution Rate of a brand is 50 percent, for example, then half the Corporate Earnings are identified as coming from that brand.

Part B

What happened in the past – or even what’s happening today – is less important than prospects for future earnings. Predicting future earnings requires adding another component to our BrandZ™ formula. This component assesses future earnings prospects as a multiple of current earnings. We call this component the Brand Multiple. It’s similar to the calculation used by financial analysts to determine the market value of stocks (Example: 12X earnings or 12X earnings). Information supplied by Bloomberg data helps us calculate a Brand Multiple. We take the Branded Earnings and multiply that number by the Brand Multiple to arrive at what we call Financial Value.

Step 2: Calculating Brand Contribution

So now we have got from the total value of the corporation to the part that is the branded value of the business. But this branded business value is still not quite the core that we are after. To arrive at Brand Value, we need to peel away a few more layers, such as the in-market and logistical factors that influence the value of the branded business, for example: price, availability and distribution.

What we are after is the value of the intangible asset of the brand itself that exists in the minds of consumers. That means we have to assess the ability of brand associations in consumers’ minds to deliver sales by predisposing consumers to choose the brand or pay more for it.

We focus on the three aspects of brands that we know make people buy more and pay more for brands: being Meaningful (a combination of emotional and rational affinity), being Different (or at least feeling that way to consumers), and being Salient (coming to mind quickly and easily as the answer when people are making category purchases).

We identify the purchase volume and any extra price premium delivered by these brand associations. We call this unique role played by brand, Brand Contribution.

Here’s what makes BrandZ™ so unique and important. BrandZ™ is the only brand valuation methodology that obtains the customer viewpoint by conducting worldwide on-going, in-depth quantitative consumer research, online and face-to-face, building up a global picture of brands on a category-by-category and market-by-market basis.

Step 3: Calculating Brand Value

Now we take the Financial Value and multiply it by Brand Contribution, which is expressed as a percentage of Financial Value. The result is Brand Value. Brand Value is the dollar amount a brand contributes to the overall value of a corporation. Isolating and measuring this intangible asset reveals an additional source of shareholder value that otherwise would not exist.
Why BrandZ™ is the definitive
Brand valuation methodology

All brand valuation methodologies are similar – up to a point.

All methodologies use financial research and sophisticated mathematical formulas to calculate current and future earnings that can be attributed directly to a brand rather than to the corporation. This exercise produces an important but incomplete picture.

What’s missing? The picture of the brand at this point lacks input from the people whose opinions are most important – the consumer. This is where the BrandZ™ methodology and the methodologies of our competitors part company.

How does the competition determine the consumer view?
Interbrand derives the consumer point of view from panels of experts who contribute their opinions. The Brand Finance methodology employs a complicated accounting method called Royalty Relief Valuation.

Why is the BrandZ™ methodology superior?
BrandZ™ goes much further and is more relevant. Once we have the important, but incomplete, financial picture of the brand, we communicate with consumers, people who are actually paying for brands every day, regularly and consistently. Our ongoing, in-depth quantitative research includes 3.7 million consumers and more than 165,000 brands in over 50 markets worldwide. We have been using the same framework to evaluate consumer insights since we first introduced the BrandZ™ brand building platform in 1998 which allows historical understanding of the change in brand equity.

What’s the BrandZ™ benefit?
The BrandZ™ methodology produces important benefits for two broad audiences.

Members of the financial community, including analysts, shareholders, investors and C-suite, depend on BrandZ™ for the most reliable and accurate brand value information available.
Brand owners turn to BrandZ™ to more deeply understand the causal links between brand strength, sales and profits, and to translate those insights into strategies for building brand equity and fueling business growth.
Since we have been using the same framework to measure these insights, this enables historical and cross-category comparisons.

Brands ranked in the BrandZ™ Top 40 Most Valuable Canadian Brands 2019 meet the following eligibility criteria:
-
- The brand originated in Canada
- The brand is owned by a publicly traded company, or its financials are available in the public domain

For complete details, please see methodology in the Resources section of the report.
Going Global?
We wrote the book.

BRANDZ™ COUNTRY REPORTS: ESSENTIAL TRAVEL GUIDES FOR GLOBAL BRAND BUILDING

Our BrandZ™ country reports contain unparalleled market knowledge, insights, and thought leadership about the world’s most exciting markets. You’ll find, in one place, the wisdom of WPP brand building experts from all regions, plus the unique consumer insights derived from our proprietary BrandZ™ database.

If you’re planning to expand internationally, BrandZ™ country reports are as essential as a passport.

BrandZ™ Top 100 Most Valuable Global Brands 2019
This is the definitive global brand valuation study, analyzing key trends driving the world’s largest brands, exclusive industry insights, thought leadership, B2B trends and a look at Emerging Brands.

BrandZ™ Top 100 Most Valuable US Brands 2019
While America is in the midst of a unique economic and political period, US brands remain focused – and continue to thrive. This report demonstrates how consumers reward brands that evolve and deliver meaning over time, while also welcoming innovative game-changing brands.

BrandZ™ Top 40 Most Valuable Canadian Brands 2019
As one of the most moderate, politically stable and diverse countries in the world, Canada has been a bastion for trust, transparency and pluralistic values in recent years. But how is it faring economically? And which of its brands are emerging onto the world stage? Find out in our first ever BrandZ Canada report!

BrandZ™ Top 50 Most Valuable Latin American Brands 2018
The report profiles the most valuable brands of Argentina, Brazil, Chile, Colombia, Mexico and Peru and explores the socio-economic context for brand growth in the region.

BrandZ™ Top 50 Most Valuable French Brands 2019
France is one of the largest economies in the EU, seventh largest in the world, and has proved itself as being adept at managing change. This new report explores a landscape in transition, and how its rich heritage and expertise can help define the path for French brands in the future.

BrandZ™ Top 50 Most Valuable German Brands 2019
Germany has become synonymous with excellence in design and engineering, not just in motor cars… but in other categories that have exported what Germany itself represents. In an uncertain geo-political landscape and time, find out how diversity has driven growth in this fascinating market.
Modern Italy is no longer just the home of fine art, rich history, and la dolce vita. While Italy hosts some of the most recognized and coveted brands on the planet, this report highlights how Italian engineering, design and creativity are powering world-class Italian brands, both old and young.

This report identifies the key forces driving growth in one of the largest, most influential and dynamic markets in Western Europe, built on centuries-old strengths, and adapting to new and challenging conditions.

This report explores the country’s most accomplished brands, analyzes their success and identifies the key forces driving growth in this market.

Our latest Australian ranking highlights an economy dominated by retail, telecoms, insurance and banks. But what’s missing from Australia’s brand mix? Explore Australia’s most successful brands, the innovation gap, and key lessons for building strong brands that stand the test of time.

Cuba is a market unparalleled both in the Caribbean region and the world. Brand awareness among Cubans is high, but gaining access to them uniquely challenging. Now is the time to plan your Cuba strategy.

Mongolia’s GDP has grown at rates as high as 17 percent in recent years, encouraging a growing number of international brands to gravitate toward this fast-growth market and make a beeline for one of Asia’s hidden gems.
The fastest growth is happening deep in the country, in less well-known cities and towns. Consumers are more sophisticated and expect brands to deliver high-quality products and services that show real understanding of local market needs.

WPP has been in China for over 40 years. We know the Chinese market in all its diversity and complexity. This experience has gone into our series of BrandZ™ China reports. They will help you avoid mistakes and benefit from the examples of successful brand builders.

This exclusive new report provides the first detailed examination of Chinese investors, what they think about risk, reward and the brands they buy and sell. This will help brand owners worldwide understand market dynamics and help build sustainable value.

“The Power and Potential of the Chinese Dream” is rich with knowledge and insight, and forms part of a growing library of WPP reports about China. It explores the meaning and significance of the “Chinese Dream” for Chinese consumers as well as its potential impact on brands.

The Chinese Golden Weeks in Fast Growth Cities

Using research and case studies, this report examines the shopping attitudes and habits of China’s rising middle class and explores opportunities for brands in many categories.

For the iPad magazine, search Golden Weeks on iTunes.

The Chinese New Year in Next Growth Cities

The report explores how Chinese families celebrate this ancient festival and describes how the holiday unlocks year-round opportunities for brands and retailers, especially in China’s lower-tier cities.

For the iPad magazine, search Golden Weeks on iTunes.

BrandZ™ Top 50 Chinese Global Brand Builders 2019

This ground-breaking study aims its radar at the edge of the Chinese brand universe, and those brands exploring developed country markets where only a few Chinese brands have dared to go so far.

8 Retail Trends in China for the year of The Rooster

With the continued rebalancing of the Chinese economy, 2017 - The Year of the Rooster, could be characterised as another year of change for China. The retail sector is at the intersection of much of this transformation, and with the rapid growth of e-commerce, Chinese retail is changing and adapting fast...
BrandZ™ Brand Building Tools

TrustR
Engaging Consumers in the Post-Recession World
Trust is no longer enough. Strong brands inspire both Trust (belief in the brand’s promise developed over time) and Recommendation (current confirmation of that promise). This combination of Trust plus Recommendation results in a new metric called TrustR.

RepZ
Maximizing Brand and Corporate Integrity
Major brands are especially vulnerable to unforeseen events that can quickly threaten the equity cultivated over a long period of time. But those brands with a better reputation are much more resilient. Four key factors drive Reputation: Success, Fairness, Responsibility and Trust. Find out how your brand performs.

CharacterZ
Brand personality analysis deepens brand understanding
Need an interesting and stimulating way to engage with your clients? Want to impress them with your understanding of their brand? A new and improved CharacterZ can help! It is a fun visual analysis, underpinned by the power of BrandZ™, which allows detailed understanding of your brand’s personality.

InnovationZ
Discover InnovationZ, a dynamic new tool from BrandZ™
Discover innovation ideas from around the world, personalized to your client’s category.

WebZ
Your web traffic story for your brand
WebZ helps you understand your brand’s digital journey! Through analyzing how traffic is driven to your brand’s website, it will help you understand your audience demographics and gain insights into viewer trends.

SocialZ
Real-time Brand Social Media Analytics Dashboard
Part of the BrandZ™ suite of tools SocialZ is the new social media data visualization product from BrandZ™ that enables you to easily track, visualize and present a data-driven approach using the real-time view of social landscape surrounding any brand.

BrandZ™ on the move
Get the BrandZ™ Top 100 Most Valuable Global Brands, Chinese Top 100, Indian Top 50, Latin American Top 50, USA Top 100, and many more insightful reports on your smartphone or tablet.
Interactive elements allow you to create your own data charts, look at the brand values over time for the brands you are most interested in, and then chart, articles and insights to your colleagues directly from the app.

To download the apps for the BrandZ™ rankings, go to www.BrandZ.com/mobile (for iPhone and Android). BrandZ™ is the world’s largest and most reliable customer-focused source of brand equity knowledge and insight. To learn more about BrandZ™ data or studies, or view one of our industry insight videos, please visit www.BrandZ.com, or contact any WPP company.
Genome mapping: the science behind our art

One of mankind’s greatest recent achievements was successfully sequencing our own Genome in 2003, revealing the key building blocks of what makes us human.

Now BrandZ™ gives you the ability to do the same for your brand of choice.

The BrandZ™ Brand Genome visualizes your brand’s “genome” on a page, with all the genome sequence measures providing an instant overview of your brand.
WPP company contributors

geometry

Geometry is the WPP end-to-end commerce agency, operating in 56 markets around the world and conceived to activate brands at the speed of life. We believe that commerce holds the most untapped creative potential to grow people, brands and companies. By understanding people through the lens of how, why and what they buy, we put people at the heart of all we do to create seamless brand experiences that meet people's needs and drive growth. Geometry's expertise comes to life across any surface and screen, in physical retail, e-commerce, experiential, branding and design and consultancy - all enabled by technology.

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GREY

Grey ranks among the largest global communications companies. It serves one fifth of the Fortune 500 in 96 countries. Under the banner of “Grey Famously Effective since 1977”, the agency serves a blue-chip roster of many of the world’s best known companies: Procter & Gamble, GlaxoSmithKline, Kellogg’s, Pfizer, Canon, Marriott Hotels & Resorts, Nestle, Volvo, Darden Restaurants and T.J. Maxx. In recent years, Grey has been named Adweek’s “Global Agency of the Year” twice; Ad Age’s “Agency of the Year” and Campaign magazine’s “Global Network of the Year” in recognition of its record creative and financial performance.

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groupM

GroupM is the world’s leading media investment company responsible for more than $48 billion in annual media investment through agencies including Mindshare, MediaCom, Wavemaker, Essence and m/SIX, as well as the outcomes-driven programmatic audience company, Xaxis. GroupM creates competitive advantage for advertisers via its worldwide organization of media experts who deliver powerful insights on consumers and media platforms, trading expertise, market-leading brand-safe media, technology solutions, addressable TV, content, sports and more.

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gtb

A global, industry-leading communications agency, GTB transforms businesses through the world’s most purposeful, creative solutions fueled by precise marketing. Founded in 2007 and part of the WPP (NYSE:WPP) group, GTB leverages its deep understanding of the consumer and its clients’ business to deliver true integration within the speed, diversity and potential of modern communications to “make what matters” for people and for business. GTB has 52 global offices and operates across 6 continents.

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MediaCom’s presence in Canada spans 50 years and extends across three Canadian offices. While headquarters are in Toronto, both Montreal and Vancouver have access to the full suite of capabilities, servicing local and national clients. MediaCom’s success is underpinned by our belief that by investing in our people, we’ll deliver better results for our teams and clients. “People First, Better Results” means that we invest in our people’s careers and capabilities to help grow our clients’ businesses. In 2018, this approach led MediaCom to become the first network to hold all six major Media Network of the Year titles concurrently.

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Mindshare

We were born in Asia in 1997, a WPP startup with a desire to change the media world. Now we are a global network with 126 offices in 86 countries and billings of $16.5bn. We are the largest agency in GroupM, WPP’s Media Investment Management arm, which is the #1 media holding group globally with billings of $45.5bn (Source: COMvergence 2018). We aim to be our clients’ lead business partner, to grow their business and drive profitability through adaptive and inventive marketing. We do this through speed, teamwork and provocation because in today’s world everything begins and ends in media. We create new things and have fun doing it...

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Mindshare Strategies

With seven offices across the country, Hill+Knowlton Strategies Canada is a leader in public relations and public affairs. Headquartered in Toronto, it’s the No. 1-rated strategic communications firm in Canada. Its experts specialize in corporate communications, marketing communications, public affairs, public participation, crisis, energy, technology, health care, content marketing, data + analytics, social and digital communications, financial communications and transactions. It is the only communications firm to have earned the Canada Order of Excellence for Quality from Excellence Canada. Its parent company, Hill+Knowlton Strategies Inc., is a member of WPP (NASDAQ, WPPGY), one of the world’s largest communications services groups.

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Hill+Knowlton Strategies

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MINDSHARE

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Ogilvy has been producing iconic, culture-changing marketing campaigns since the day its founder David Ogilvy opened up shop in 1948. Today, Ogilvy is an award-winning integrated creative network that makes brands matter for Fortune Global 500 companies as well as local businesses across 132 offices in 83 countries. The company creates experiences, design and communications that shape every aspect of a brand’s needs through six core capabilities: Brand Strategy, Advertising, Customer Engagement and Commerce, PR and Influence, Digital Transformation, and Partnerships. The company also provides a comprehensive range of services around management consulting, brand identity, analytics and research capabilities, multicultural marketing and behavioural change.

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The Store is a global retail practice of WPP, specializing in providing expertise, support and added value to client initiatives in retail dynamics. The Store is a knowledge hub, built to help clients navigate through insights for consumers, retailing, marketing and sales activation, and technology. The Store is also a host of global workshops that bring together retailing and branding experts to share their vision and expertise for future growth.

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TAXI is a wholly owned subsidiary of VMLY&R, with offices in Canada and the United States. Built on the mantra “Doubt the Conventional, Create the Exceptional,” TAXI has been named Canadian Agency of the Decade and is internationally recognized for its strategic, creative, digital, and design capabilities. Major clients include Canadian Tire, Audi, Fido, Kraft/Heinz, Danone, and Pfizer.

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The Wavemaker Canada team includes 200 experts servicing more than sixty clients, all united through our focus on understanding, accelerating and optimizing the purchase journey. A part of the GroupM family of media agencies responsible for 30% of all advertising investment in Canada affords access to not only scale, but advantages in partnerships, technology and innovation. Some of our successful local and global client relationships include Church & Dwight, Danone, L’Oreal, Molson-Coors and Pfizer. Wavemaker Canada has been named ‘Great Place To Work’ four years running, including recognition for ‘Inclusion’ and ‘Managed by Women’, and currently ranks #2 on the latest RECMA Qualitative Evaluation report.

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Wunderman Thompson is a creative, data and technology agency with a mission to inspire growth for its clients and their brands. Headquartered in New York, the agency provides end-to-end solutions through creative, data, commerce, consulting and technology services at a global scale. Wunderman Thompson brings together over 20,000creatives, data scientists, strategists and technologists in 90 market around the globe, approximately 4000 people in 23 markets in North America. Our breakthrough creativity has always helped our clients’ businesses succeed. Today, our culture, approach and offerings puts us in a unique position to inspire growth for our clients.

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BRANDZ™ TOP 40 MOST VALUABLE CANADIAN BRANDS 2019

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WPP in Canada

We help build valuable brands

WPP is a creative transformation company. We build better futures for our clients through an integrated offer of communications, experience, commerce and technology.

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Amandine Bavent is a BrandZ™ Valuation Director for Kantar. She manages the brand valuation projects for BrandZ™. Her role involves conducting financial analysis, researching brands and performing valuations.

Martin Beaulieu
Martin Beaulieu is an award winning environmental photographer. He photographed the daily lives of local people and their interaction with brands from Vancouver to Montreal for the BrandZ™ Canada Report.

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Bethan Davies is part of The Store WPP’s EMEA and Asia team, and manages worldwide projects, digital and online initiatives for BrandZ™ and WPP The Store.

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Priscilla Dixon is the Marketing Manager for Kantar Canada. She is coordinating local marketing activities and events around the BrandZ™ ranking and launch.

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Martin Guenriera is Global BrandZ™ Research Director at Kantar, and heads the consumer research component of BrandZ™. He is involved in delivering the full suite of BrandZ™ research tools.

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Elspeth Cheung is the Global BrandZ™ Valuation Director for Kantar. She is responsible for valuation, analysis, client management and external communication for the BrandZ™ rankings and other ad hoc brand valuation projects.

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Aurelio DiLuciano is the Vice President, Business Development at Kantar Canada. His role is to help brands to find ways to leverage BrandZ™ insights in their business.

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Lucy Edgar is the Global Marketing Manager at Kantar, where she is responsible for the PR, marketing and communications on the BrandZ™ projects.

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Visit us at www.brandz.com

I’m David and I look after WPP’s BrandZ™ – the WPP brand equity platform that covers over 166,000 brands in 51 countries. It’s big brand data on steroids, now with 5.2 billion brand data points and counting.

Sounds impressive, but what does that actually mean for you?

Everyone agrees these days that data is king but the trouble with raw data is that it’s dry, it lacks humanity. It’s not always easy to navigate and can be off-putting. It’s only useful when, like oil, it’s refined and when it also tells a compelling and actionable story...and when it’s easy to find what you want, fast.

That’s why I have enlisted RoZie.

- She’s our new, smart and very friendly chatbot. We have built her literally from the ground up.
- She’s borne of AI. And thanks to machine learning and brilliant programming she’s intuitive, imaginative and oozes personality.
- Through her artificial neural network she’s linked constantly to the 166,000-plus brands in our database.
- RoZie doesn’t sleep. She never stops learning, always ready to pass on the next relevant nugget of information about any given brand.

And what’s appealing for you is that she can break down all that information, knowledge and brand understanding into bite-size chunks for you to access.

Need a SWOT on your brand or one of its competitors? It’ll be on your screen and in your inbox in less than a minute.

Same for brand values – be they global, local, current and over time. Brand genomes. Brand characters and their personalities. Vitality Quotients. Trends. Brand studies and reports and relevant thought leadership from experts right across the WPP Group, across the world.

RoZie has a treasury of information for you to use. Free, and now.

Back in the day, I was Global Planning Director on major blue-chip businesses, including automotive, FMGC, technology and retail.

If only I’d had RoZie to help me.

My knowledge and understanding of brands around the world would have been fuller; I would have generated smarter briefs, my answers to clients quicker, and my new business record even RoZier.

But don’t take my word for it, go to the link below and say hello to RoZie.

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BrandZ™ brand valuation contact details

The brand valuations in the BrandZ™ Top 40 Most Valuable Canadian Brands 2019 are produced by Kantar using market data from Kantar, along with Bloomberg. The consumer viewpoint is derived from the BrandZ™ database. Established in 1998 and constantly updated, this database of brand analytics and equity is the world’s largest, containing 3.7 million consumer interviews about more than 165,000 different brands in over 50 markets.

Bloomberg

The Bloomberg Professional service is the source of real-time and historical financial news and information for central banks, investment institutions, commercial banks, government offices and agencies, law firms, corporations and news organizations in over 150 countries. For more information, please visit www.bloomberg.com.

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