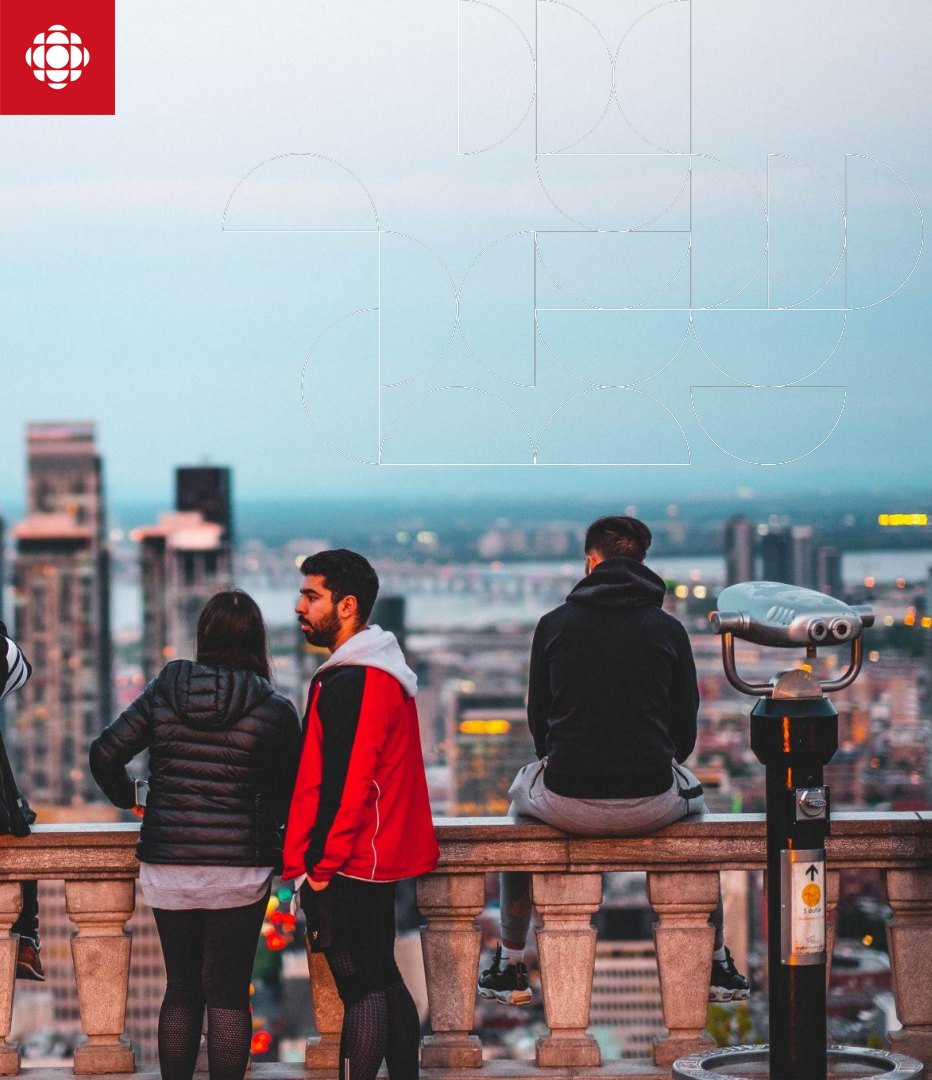




THE IMPORTANCE OF THE QUEBEC MARKET

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2 MYTHS ABOUT THE QUEBEC MARKET:

- **Small share of the canadian population**
- **Expensive and complicated Market**



MYTH # 1:

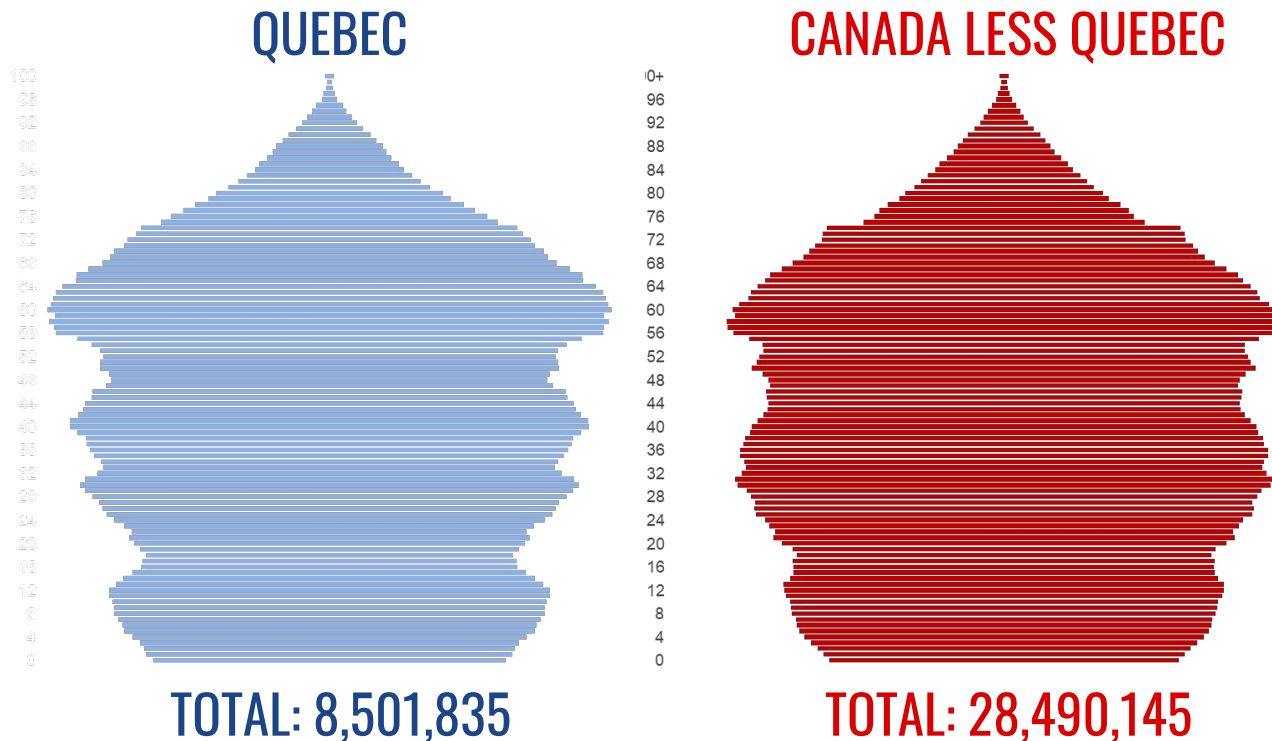
QUEBEC REPRESENTS A SMALL SHARE OF THE OVERALL CANADIAN POPULATION



WITH 23% OF THE NATIONAL POPULATION, QUEBEC HAS THE SECOND LARGEST POPULATION IN CANADA

Number of People, by Age, 2021 Census

Base: Total Population

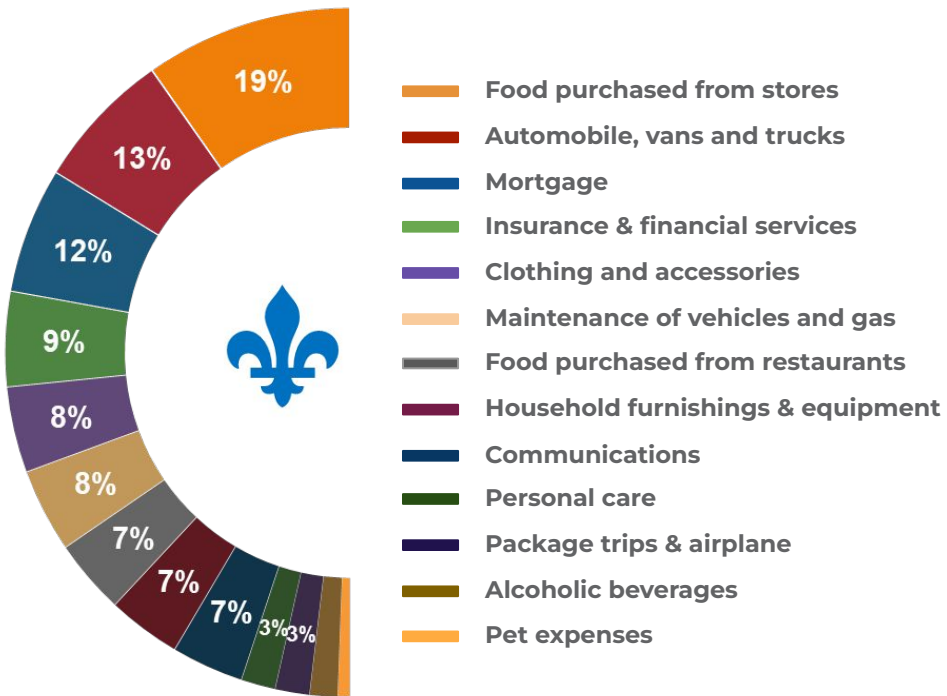




QUEBEC IS THE SECOND LARGEST ECONOMY IN THE COUNTRY

% of current consumption expenditure by category

Households - 2019





MYTH # 2

THE QUEBEC MARKET
IS EXPENSIVE
AND COMPLICATED
TO EXECUTE



**THERE IS
A MISCONCEPTION THAT
QUEBEC IS AN EXPENSIVE
MARKET...**

**BUT QUEBECERS
DISTINGUISH THEMSELVES
FROM THE REST OF CANADA
IN MANY KEY CONSUMPTION
CATEGORIES**



QUEBECERS ARE PASSIONATE ABOUT GASTRONOMY

Composition index, A18+

ALMOST 25% OF
CANADIAN FOOD
EXPENSES COME
FROM THE
PROVINCE OF
QUEBEC¹ (I. 108)

Research Department

Source: Vividata, summer 2023 study, A18+, Quebec Franco and Canada minus Quebec Franco (ROC= rest of Canada). Agree with the following statement (results 4-5 on a scale of 1 to 5, where 1 = strongly disagree and 5 = strongly agree). 2) Strongly agree (5 on a scale to 1 to 5). Index: likelihood of having the analysed characteristics, relative to the average population (pop = 100).

The higher the index (> 100), the more pronounced the trend.

Source household expense: Statistics Canada, Survey of Household Spending in 2019, Quebec province and total Canada minus Quebec, household expenditures. February 2021.

I.116

(ROC i.96)

I prefer to prepare my meals from scratch

I.114

(ROC i.96)

I get a lot of pleasure out of food

I.118

(ROC i.94)

I enjoy entertaining
at home²

I.143

(ROC i.86)

I like to dine at fine restaurants
as often as possible²

I.110

(ROC i.96)

I enjoy splashing out
on a meal in a restaurant²



QUEBECERS ARE PASSIONATE ABOUT WINE AND CULTURE

Research Department
Source alcohol: Statistics Canada. Table 10-10-0010-01 Sales of alcoholic beverages types by liquor authorities and other retail outlets, by value, volume, and absolute volume. 2021-2022. Volume for total sales.
Source entertainment: Vividata, Summer 2023 survey, Quebec Franco and Canada minus Quebec Franco (ROC= rest of Canada), A18+. Attend in the past 12 months. Movies = attend in the past 2 weeks) Index: likelihood of having the analysed characteristics, relative to the average population (pop = 100). The higher the index (> 100), the more pronounced the trend.



QUEBECERS ARE MORE LIKELY THAN THE REST OF CANADA TO BUY ALCOHOL

Composition index, A18+

Bought alcohol
(all types)

1.110

(ROC i.97)

Bought
wine

1.152

(ROC i.85)

Bought
beer

1.118

(ROC i.95)

QUEBECERS LIKE TO PERSONALLY ATTEND

(past 12 months)

Comedy festivals

1.128

(ROC i.93)

Ballet

1.122

(ROC i.94)

Opera

1.138

(ROC i.91)

Music concerts

1.120

(ROC i.95)

Movies (in past 2 weeks)

1.122

(ROC i.93)



QUEBECERS ARE GLOBETROTTERS

Research Department
Source: Vividata, Summer 2023 survey, Quebec Franco and Canada minus Quebec Franco (ROC= rest of Canada), A18+. Strongly agree with the statement (results 5 on a scale of 1 to 5, where 1 = strongly disagree and 5 = strongly agree). Index: likelihood of having the analysed characteristics, relative to the average population (pop = 100). The higher the index (> 100), the more pronounced the trend.



QUEBECERS RELY ON TRADITIONAL MEDIA (newspaper, magazine, radio or TV for their travel decisions)

1.114

(ROC i.98)

THEY LIKE TO TAKE ADVANTAGE OF THEIR VACATIONS TO RELAX WITHOUT WORRYING ABOUT ANYTHING

Relaxation
Tours

1.149

(ROC i.85)

Spa and wellness
programs tours

1.122

(ROC i.99)

Like to go on vacation
where activities are
organised for them

1.114

(ROC i.97)

THEY ARE ALSO DISTINGUISHED BY THEIR PREFERRED DESTINATIONS

(plan to visit next year)

Quebec

1.197

(ROC i.72)

Mexico / Caribbean

1.123

(ROC i.95)

South / Central America

1.116

(ROC i.90)

Europe

1.125

(ROC i.90)



QUEBEC IS THE #2 PROVINCE WITH THE HIGHEST NEW VEHICLE SALES AND OWN 42% OF ALL CANADIAN ELECTRIC VEHICLES

Research Department
Source: Bought a new vehicle in 2022: Statistics Canada, Table 20-10-0001-01 New motor vehicle sales, 2022. % of electric vehicles owned by Quebecers: Association des Véhicules Électriques du Québec, <https://www.aveq.ca/actualite/actualites/statistiques-saaq-aveq-sur-lele-cromobilite-au-quebec-en-date-du-31-decembre-2022-infographie>. Other: Vividata, Summer 2023 survey, Quebec Franco and Canada minus Quebec Franco (ROC= rest of Canada), A18+. *Strongly agree with the statements (score 5 on a scale of 1 to 5, where 1 = strongly disagree and 5 = strongly agree).



Bought a new vehicle in 2022

1.109

(ROC 1.97)

QUEBECERS HAVE A HIGHER PROPENSITY TO OWN
AN ELECTRIC VEHICLE OR INTEND TO ACQUIRE ONE

42%

of electric vehicles

in Canada are owned by Quebecers

1.191

(ROC 1.74)

Intent to buy a plug In hybrid electric
vehicle in the next 12 months*

1.155

(ROC 1.87)

If given choice, would
always choose luxury
auto

1.147

(ROC 1.86)

Keep up on the latest
advances in automobile
technology*

1.122

(ROC 1.93)



QUEBECERS ARE DEDICATED CONSUMERS OF SAVING PRODUCTS



Own a at least one
registered saving account

I.116

(ROC i.96)

Own more than one type of
registered savings account

I.121

(ROC i.94)

Registered Retirement
Savings Plans (RRSPs)

I.122

(ROC i.94)

Registered Pension Plans
(RPPs)

I.131

(ROC i.91)

Consider it is important to be well insured for everything*

I.127

(ROC i.94)

Research Department
Sources : Registered saving accounts: Statistics Canada. Table
98-10-0085-01 Household contributions to: Canada, provinces and
territories, census metropolitan areas and census agglomerations with
parts. 2021. * Vividata, Summer 2023 survey, Quebec Franco and Canada
minus Quebec Franco (ROC= rest of Canada), A18+. Strongly agree with
the statements (score 5 on a scale of 1 to 5, where 1 = strongly disagree
and 5 = strongly agree).



THE STAR SYSTEM AND THE IMPORTANCE OF TV IN QUEBEC CULTURE

Quebec has its own star system for music, television, stand up comedy and movies, with each genre celebrating its talent with various award shows. The stars dominate the media landscape by working across multiple networks and media companies.



QUEBEC STARS SHINE BRIGHT

Three examples of brands
using talent from the
Quebec star system for
their ads

Tim Hortons

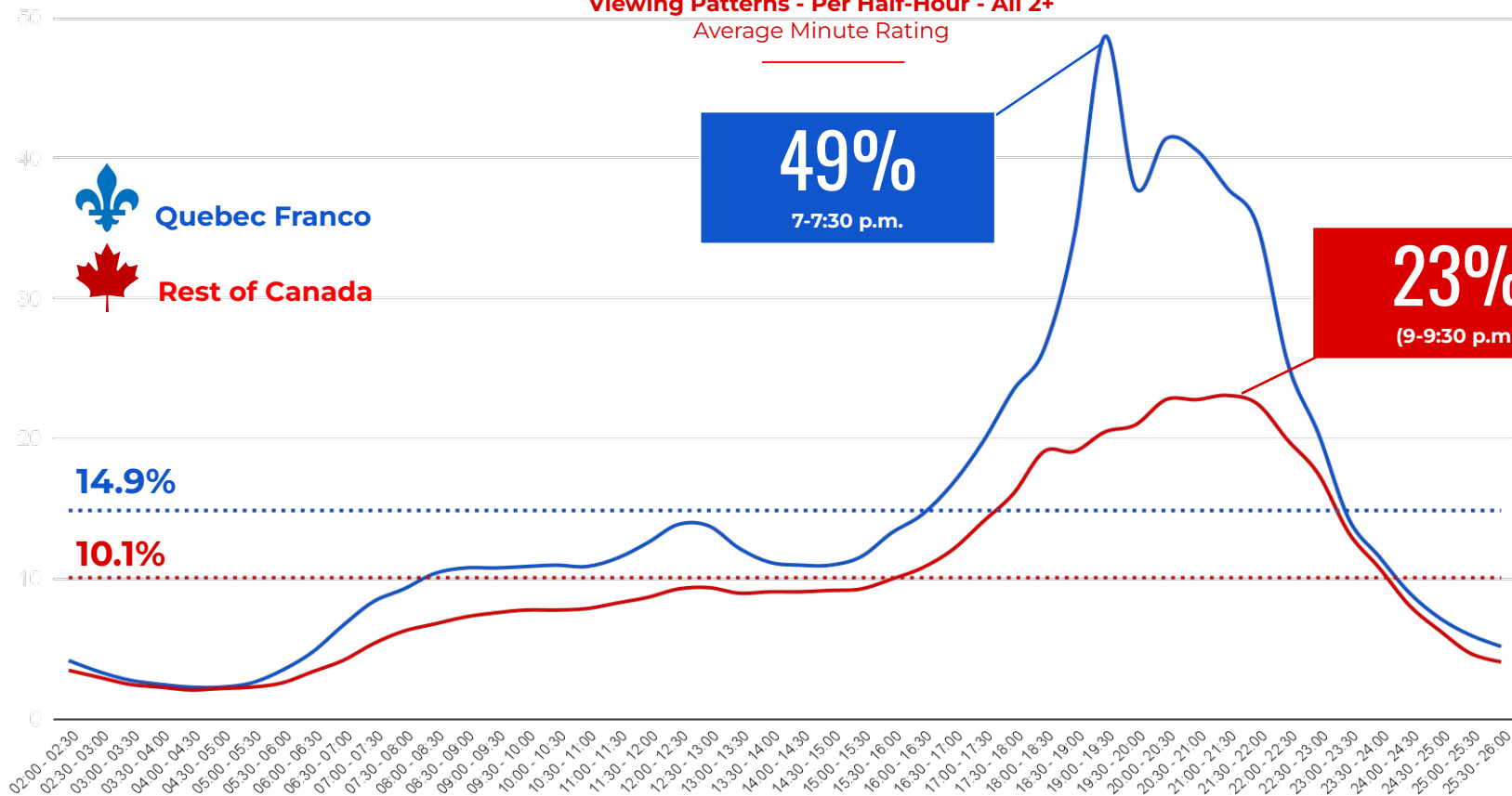




QUEBECERS LOVE THEIR TV

Viewing Patterns - Per Half-Hour - All 2+

Average Minute Rating





THEY ARE PASSIONATE ABOUT HOME-GROWN CONTENT



TOP 50 French Quebec
25-54

48 ARE ORIGINAL
PRODUCTIONS

46 among A18-34



TOP 50 English Canada
25-54

46 ARE AMERICAN
PRODUCTIONS

46 among A18-34



IN QUEBEC, BUILDING A STRONG CAMPAIGN IS FASTER

Spots can get you a much higher GRP in Quebec than in the rest of Canada

Research Department
Source: Numeris (PPM), Quebec Franco and Canada less Quebec
Franco, fall 2022: Sept. 12-Dec. 11, A25-54. 5 spots in STAT
(Mon-Thu 7-7:30pm) and 5 spots in Grey's Anatomy (Thu 9-10pm).
Data rounded off.



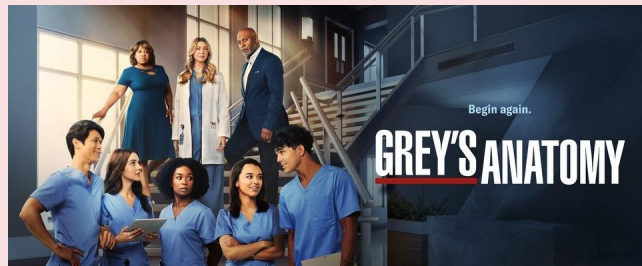
STAT
5 spots (A25-54)

28%

2.9

83

Reach x Freq. = **GRP**



Grey's Anatomy
5 spots (A25-54)

7%

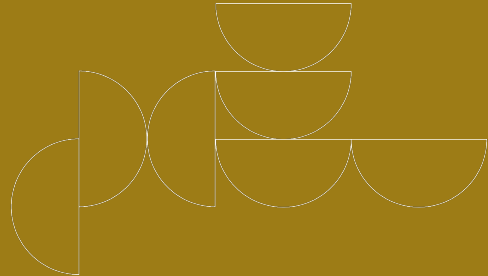
2.6

17

Reach x Freq. = **GRP**

The background of the left half of the slide is a dark, starry night sky filled with numerous small, glowing yellow and white stars of varying sizes, creating a festive and celebratory atmosphere.

BYE BYE DE LA PUB 2023



Much like the Super Bowl in the United States, the Bye bye de la pub encourages brands to create and design unique ads for the New Year's Eve broadcast.

In 2018, Radio-Canada launched a public facing contest for advertisers during the *Bye Bye*, in which the public was encouraged to vote for their favourite ad, with the winner announced in January.

In 2022, **99,014 members** of the public voted for their favourite ad among the **24 participating ads**.

A participation well beyond what we anticipated!

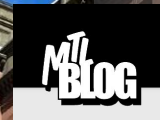
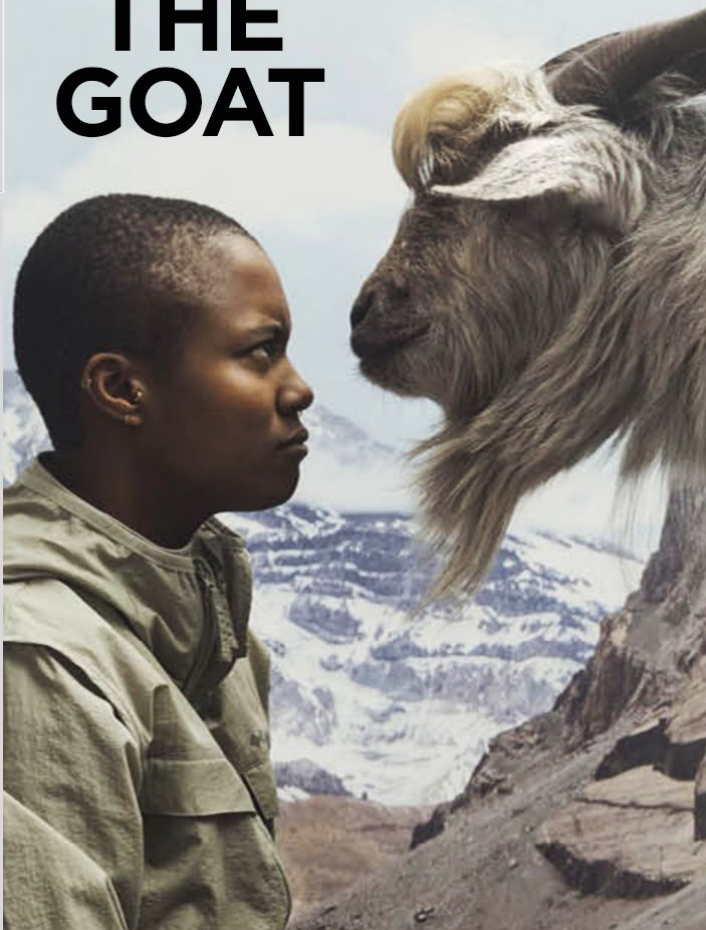


BAD ADVERTISING COST MORE

Avoid Costly Mistakes:
Speak the Quebec
Language

BE THE GOAT

 Columbia



The English version of the Columbia ad campaign also refers to the animal.

"Goats don't care about being 'the g.o.a.t.' a video associated with the campaign states. 'They just care about being a goat. Doing goat things. [...] Because they have an innate drive and, more importantly, the right tools to go wherever they will. And you've got that same will, we've got the way!'



The series of banners on the Hudson's Bay building does include images of a goat. But that hasn't prevented confusion among some onlookers.





AFTER VIEWING THE
CLIENT ADS DURING THE
SURVEY, A LARGE
MAJORITY AGREE THAT:

They had a **better
opinion** of
the brand

90%

The ads **really
stand out**
from others

88%

They **Wanted to know
more** about The
accounting software

86%



BILLBOARD



10 YEARS OF SUCCESS



PICTURE-IN-PICTURE



Preferred over tradition ad

80%

Like

90%

Effective

92%

Preferred over tradition ad

77%

Like

92%

Effective

88%

Preferred over tradition ad

77%

Like

88%

Effective

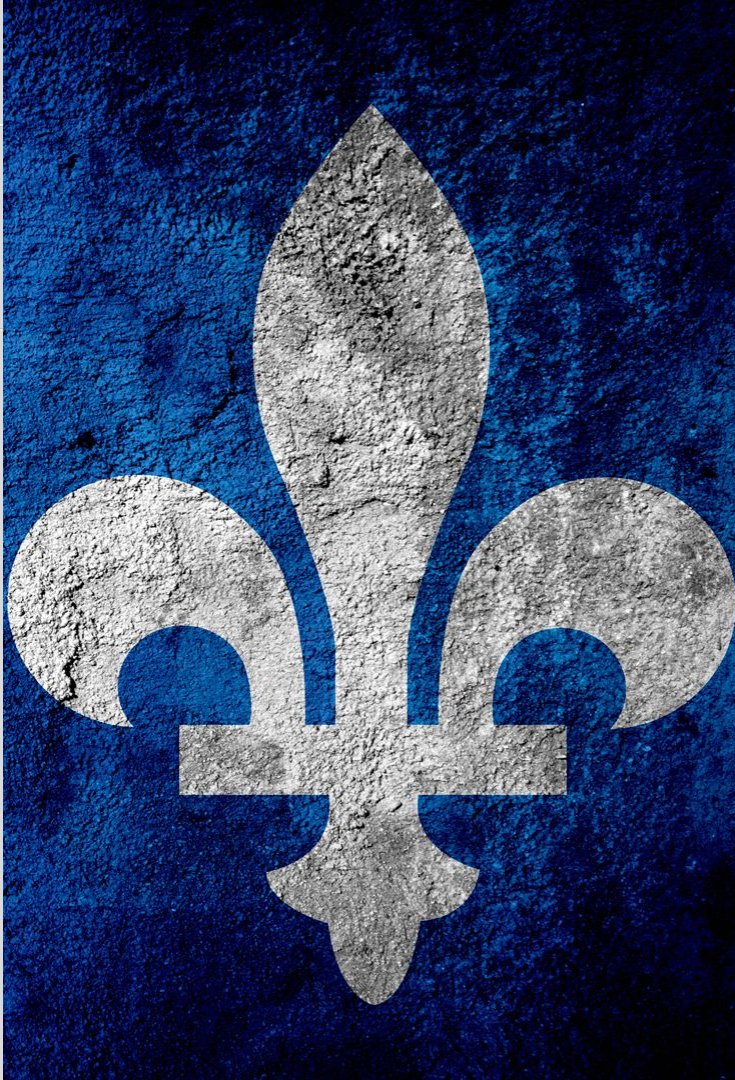
89%

EACH OF THE 3
SPONSORSHIP FORMATS
TESTED IN THE SURVEY
IS LARGELY PREFERRED
OVER TRADITIONAL ADS
BY OVER 3-IN-4
RESPONDENTS



CONCLUSION

Keys Takeaways



- Quebec has the second largest population in Canada with nearly **8.5 million people**, representing **23%** of the national population.
- Quebec is the **second largest economy** in the country, and offers **huge commercial opportunities** for your brand.
- **Quebecers distinguish themselves** from the rest of Canada in **various key consumption categories** that are highly desirable for advertisers.
- Given the **unique characteristics** of the province, a great marketing strategy for Canada as a whole is not necessarily a great strategy for Quebec.
- In order to succeed, **you need to adapt your content to this market.**



THANK YOU

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