

Quebec

10 things unique to the Quebec
market.

November 2020



10 things to know about la belle province.

We often hear the Quebec media and marketing landscape is different from the rest of Canada (*ROC*).

The penetration of online media channels and the globalization of marketing brands are contributing to Quebec being “less different” than it used to be years ago.

Nonetheless, Quebec remains a primarily French speaking market with some unique differences from the rest of Canada.

Here are some things that make Quebec’s media landscape, particularly the audio landscape, unique.

1. THERE ARE 2 QUEBEC'S IN A POPULATION OF 8.5 MILLION PEOPLE

Montreal



- Roughly half (48%) of total population of Quebec
- Mostly bilingual: 60% French, 15% English, 25% Others*
- Urban mindset (*Jazz Festival, Formula 1, Juste Pour Rire*)
- Exposed to French and English media

SOURCE: Stats Canada 2019

Rest of Quebec



- Roughly half of total population of Quebec
- Mostly French speaking (95%+)
- Regional mindset (*Local attractions*)
- Small markets and rural areas
- Largely exposed to French media

2. QUEBEC'S HAS A STRONG SOCIAL SUPPORT SYSTEM

As a result, Quebec residents pay a higher HST @15% and higher provincial income tax up to 25%



Quebec has a Provincial day care service that can cost as low as \$175 monthly. In comparison, day care in the GTA can be over \$1,000 per month.



The Government of Quebec's health care plan includes covering the cost of prescription drugs.



Post secondary education is highly subsidized vs. the ROC. Enrolment in the University of Montreal for Quebec students is considerably less than other provinces @ +/- \$2,000 per term.

3. QUEBEC CELEBRATES ITS HOMEGROWN ENTERTAINMENT INDUSTRY

As a result, maintains a focus on French Canadian achievements only



Gala Adisq celebrates French music and singers.



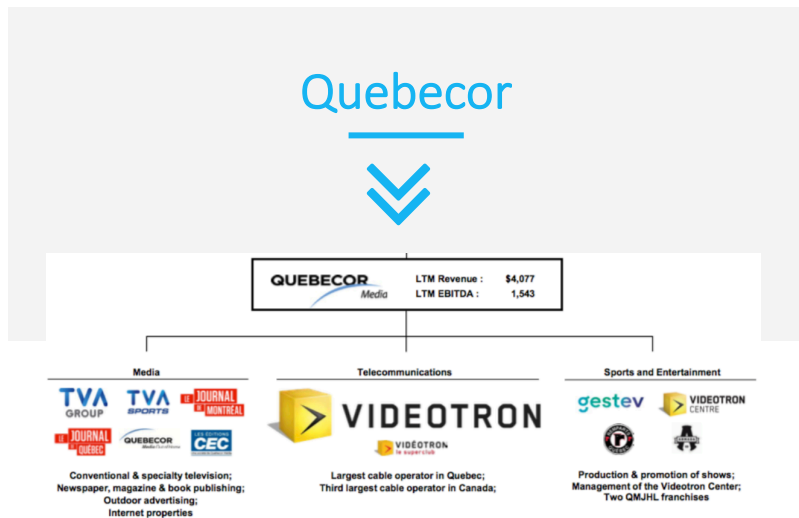
Prix Gémeaux celebrates Quebec's television industry, local television productions and stars.



Gala Québec Cinéma celebrates Quebec's home-grown movie industry based on achievements of local productions and stars.

4. QUEBEC LEVERAGES STRONG MEDIA PROPERTIES TO PROMOTE LOCAL STARS

Quebec's entertainment ecosystem is strongly supported by Quebec media outlets



- A giant in the Quebec market, encompassing Telco, Media and Sports and Entertainment, Quebecor multiplatform operations includes the operations of TVA Group (television channels, magazines, film and television production services) news media, book publishing, music recording, distribution of cultural products and advertising sales. Across its multiplatform, Quebecor claims to reach 99% of Quebecers every week.



- Radio Canada is a key media player in Quebec
- Its TV programmes often dominating the top 10
- w/o Of October 19, SRC had 7 of the top 10 TV shows (*Source: PPM, w/o Oct 19, 2+ M-SU 2a-2a, AMA*)

5a. THIS STAR SYSTEM GENERATES SPOKESPERSON STRATEGY IN QUEBEC

Quebec radio DJ's are well loved by radio listeners.

Quebec index

135

Like ads that use a
celebrity / well known
spokesperson

Quebec index

132

Liked a
DJ/personality on
Facebook

Quebec Index

201

I have a favourite DJ
I listen to

Quebec index

141

Main reason to
change the radio
station during
commute: DJ's
personalities

Quebec index

123

I have a favourite
show / program I
listen to

5b. STAR SYSTEM GENERATES SPOKESPERSON STRATEGY IN QUEBEC

Now, more than ever, major brands are leveraging Quebec local creative to support brand activity in Quebec

Quebec feels:

38%

Creative ads made in
Québec speak to me.

Quebec feels:

32%

Creative ads made in
Québec are more
original.

Quebec feels:

32%

Creative ads made in
Québec are more
convincing.

5c. STAR SYSTEM GENERATES SPOKESPERSON STRATEGY IN QUEBEC

Quebec personalities are being utilized by automotive advertisers



Nissan
Karine Vanasse



KIA
Mélissa Désormeaux-Poulin



Chevrolet
Marieloup Wolfe



Hyundai
Guillaume Lemay-Thivierge



Jeep | Ram | Dodge
Antoine Bertrand

5d. RADIO LISTENERS IN QUEBEC CONNECT TO THEIR FAVOURITE HOSTS

Nearly 1-in-3 have favourite hosts. They like their humour, and they trust their information and opinions.



6. QUEBEC MEDIA IS LESS FRAGMENTED THAN ROC

The Quebec media landscape is more homogeneous with a focus on French language programming therefore facing less competition from American cable stations spilling across the boarder.

Quebec

12 TV shows with 1 Million + 2+ Reach in Quebec alone.

Top Radio station in Montreal has a 27% share of audience tuning

Top Programs - Total Canada French W/O October 19, 2020	2+ Rating	2+ Aud. (000)
District 31 (SRC)	24.7	1,842.0
Toute la vie (SRC)	16.1	1,204.0
Discussions avec mes parents (SRC)	15.8	1,178.0
5e rang (SRC)	15.1	1,128.0
Tout le monde en parle (SRC)	15.1	1,127.0
En direct de l'univers (SRC)	15.1	1,127.0
Le Tricheur (TVA)	14.3	1,068.0
Les enfants de la télé (SRC)	14.1	1,051.0
Mon fils (TVA)	13.9	1,040.0
Bijoux de famille (TVA)	13.7	1,019.0

Total Canada

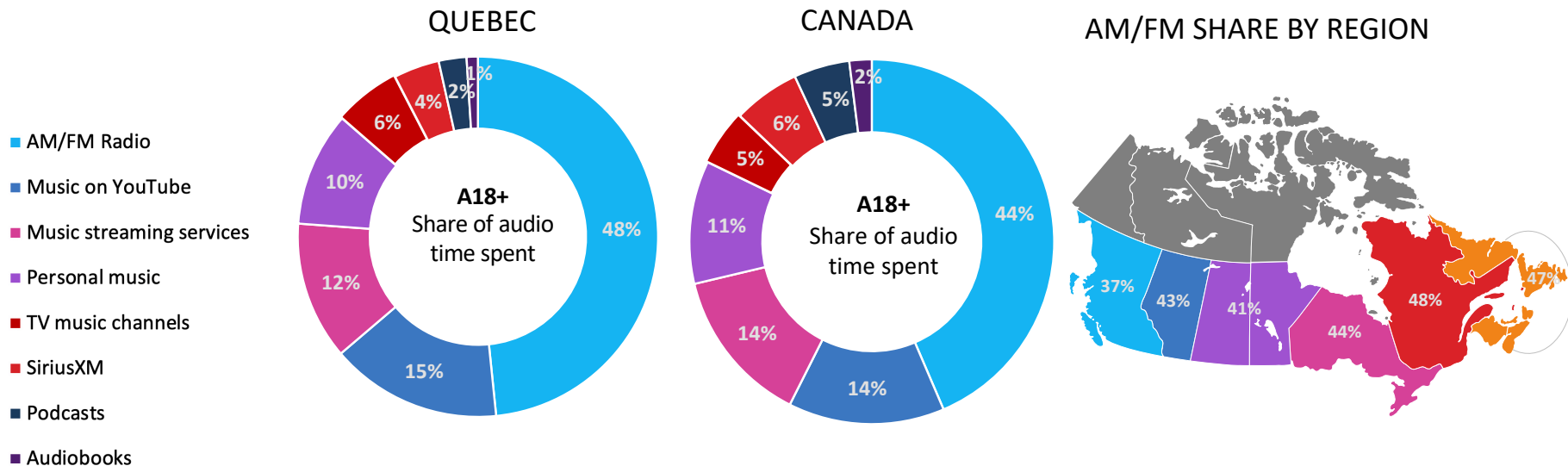
11 TV shows with 1 Million + 2+ Reach against all of Canada.

Top Radio station in Toronto has a 18% share of audience tuning

Top Programs - Total English W/O October 19, 2020	2+ Rating	2+ Aud. (000)
The Amazing Race	5.0	1,498.0
Ctv Evening News	4.9	1,475.0
Saturday Night Live	4.9	1,474.0
CTV Evening News Weekend	4.6	1,371.0
Departure	4.2	1,265.0
Big Brother	4.2	1,246.0
Big Brother	3.9	1,171.0
The Conners	3.8	1,123.0
Big Brother	3.7	1,113.0
CTV National News	3.7	1,103.0

7. AM/FM RADIO HAS A LARGER SHARE IN QUEBEC VS. ROC

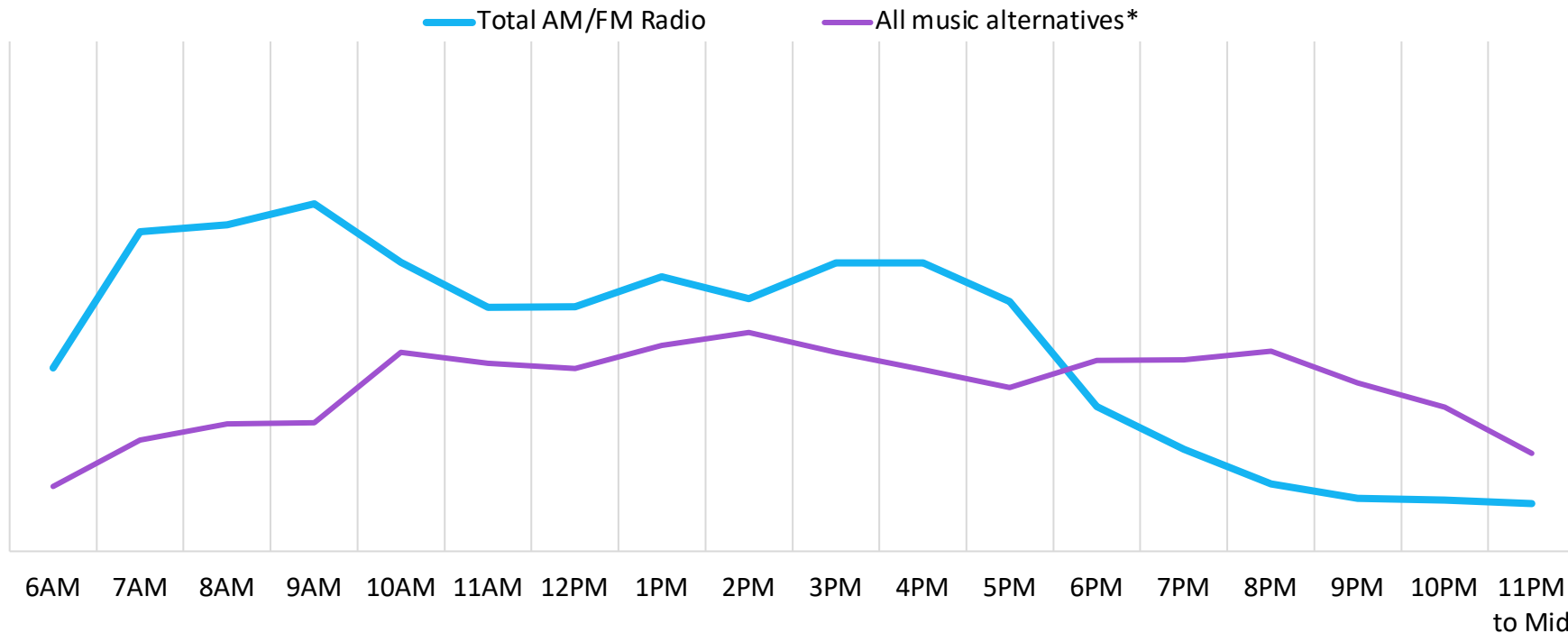
AM/FM Radio's share is 48% in Quebec, 4 points higher than the Canadian average, while streaming and podcasting is lower.



8. QUEBEC AM/FM LISTENERS DISTINCT PATTERNS

AM/FM Radio listening in Quebec peaks an hour later during morning and experiences a lift during lunchtime hours.

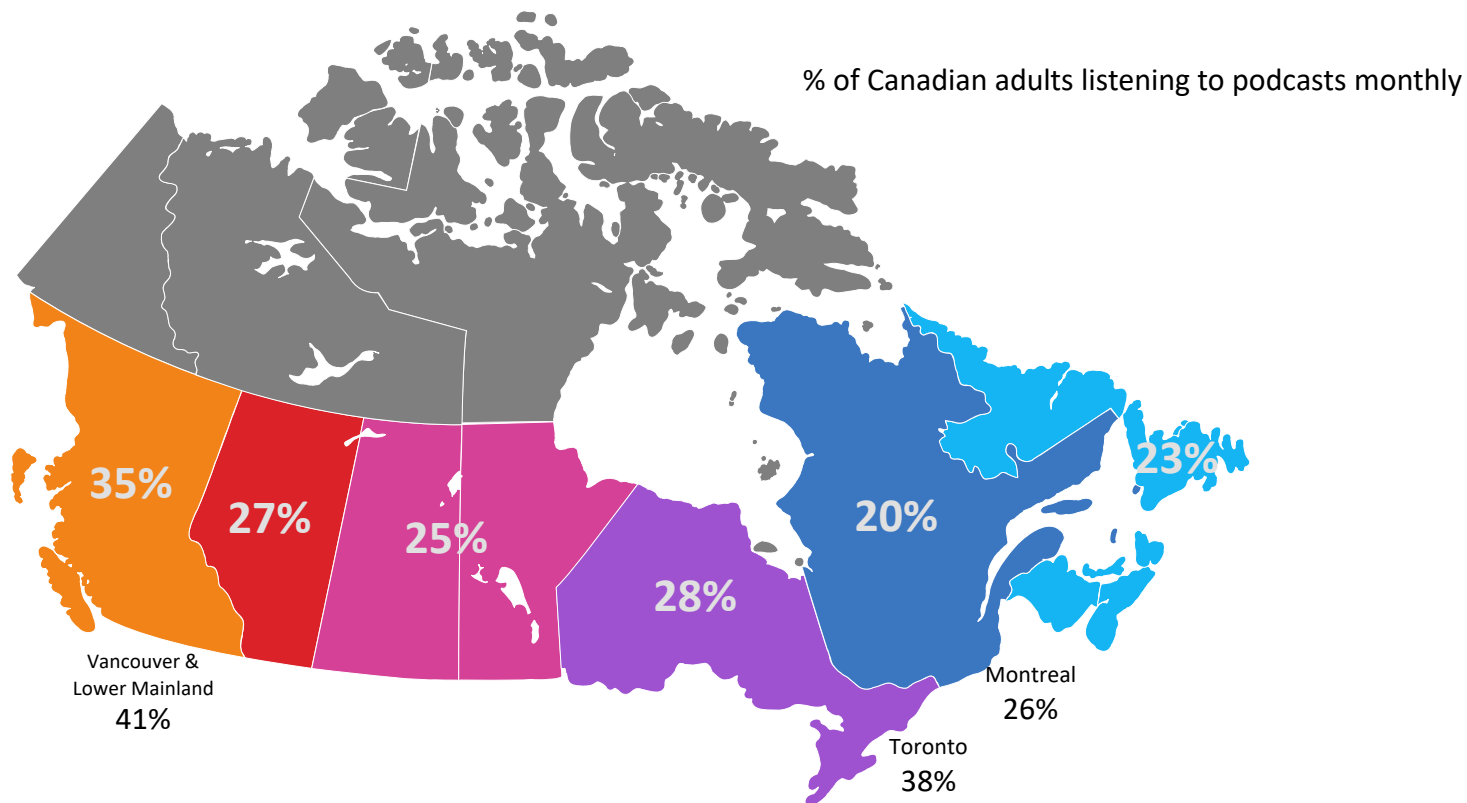
% of A18+ in Quebec listening to each audio type in each hour (Weekdays)



*All music streaming services, personal music, and music on SiriusXM, YouTube, or TV music channels.

9. PODCAST LISTENING IS LESS POPULAR IN QUEBEC

When more content is available in French, Quebec is likely to catch up to ROC in podcast consumption



10. QUEBEC CONSUMERS TRUST BRANDS WHO ADVERTISES ON RADIO

Quebec consumers are less inclined to buy from a company that sends too personal advertisements on digital platforms.



Like all Canadians, Quebecers are less likely to buy from a company that...

Index ROC

121i

Trust ads heard on the radio

123i

Less inclined to buy from a company that sends too personal ads on digital platforms

58%

Makes them feel like they're following them online

42%

Send them ads that are too personal

42%

Send them advertisements about the places they have visited

Summary.

1. There are 2 Québec's in a population of 8.5 million people. An urban Montreal population that is largely bilingual, and Rural Quebec where the French language and culture are most prevalent.
2. Quebec has a strong social support system offering subsidized daycare, prescription benefits and a heavily subsidized post secondary education. All which results in a higher HST rate and higher provincial income taxes.
3. Quebec celebrates its homegrown entertainment industry with specific awards in Music, Television and Motion Pictures, outside of any "Hollywood" recognition.
4. Quebec leverages strong media properties to promote local stars and these stars are strongly supported by Quebec media outlets.
5. The strong star system in Quebec encourages celebrity endorsement and spokesperson strategies for many national advertisers seeking a competitive edge in Quebec. Quebec radio DJ's in particular are well loved by radio listeners.
6. The Quebec media landscape is less fragmented than the Rest of Canada. Traditional media remains strong with television and radio ratings typically higher than other regions of Canada.
7. At 48% share of tuning to audio, in Quebec, AM/FM Radio has the largest share of tuning across all audio platforms.
8. Quebecers have distinct listening patterns. Listening peaks an hour later during morning and experiences a lift during the lunchtime hours.
9. Podcast listening in Quebec has yet to reach the same levels as ROC, largely due to limited availability of French language content.
10. When it comes to advertising, Quebec consumers trust brands who advertise on Radio.