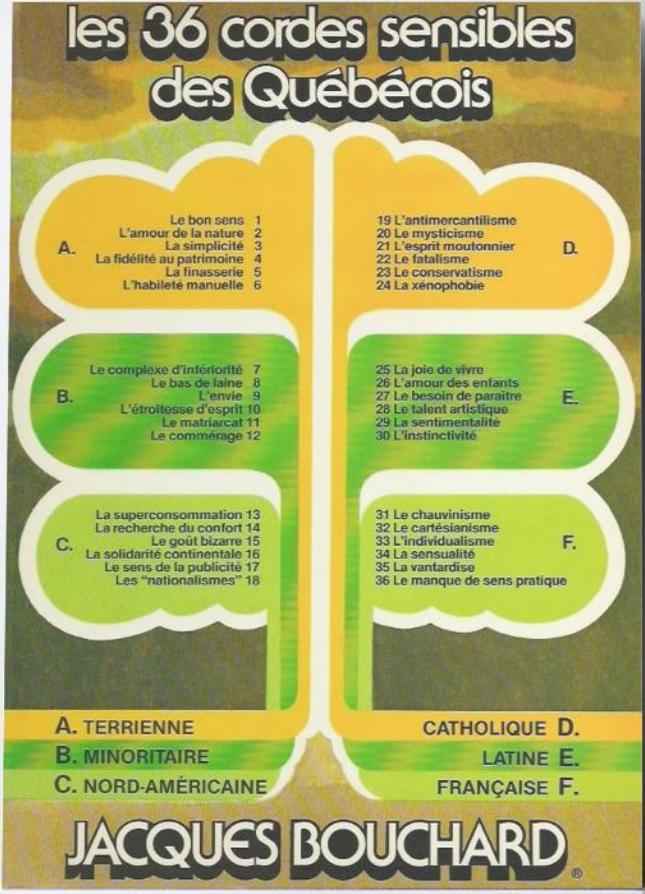




Leger

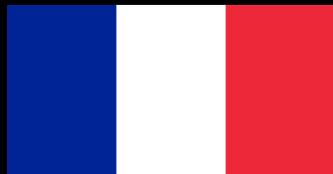
CRACKING THE QUEBEC CODE IN 45 MINUTES

18 OF THE 36 CULTURAL MARKERS OF THE SEVENTIES ARE GONE

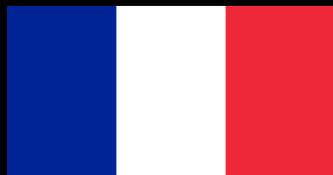


MARKER CATEGORY	TOTAL
Latin	5/6
Roots, tradition	5/6
North American	4/6
France	2/6
Minority complex	2/6
Catholicism	0/6

FROM A CULTURAL
POINT OF VIEW,
WHO DO QUEBECERS
FEEL CLOSEST TO?



FROM A CULTURAL
POINT OF VIEW,
WHO DO QUEBECERS
FEEL CLOSEST TO?



1/3

LANGUAGE,
CULTURE
& EMOTION



1/3

CUSTOMS AND
POLITICAL
INSTITUTIONS



1/3

THE DREAM,
CAPITALISM

ENGLISH CANADIANS AND
FRENCH CANADIANS ARE
71% THE SAME,

BUT NO MARKETER
CAN AFFORD SUCH
**LOW
EFFECTIVENESS.**

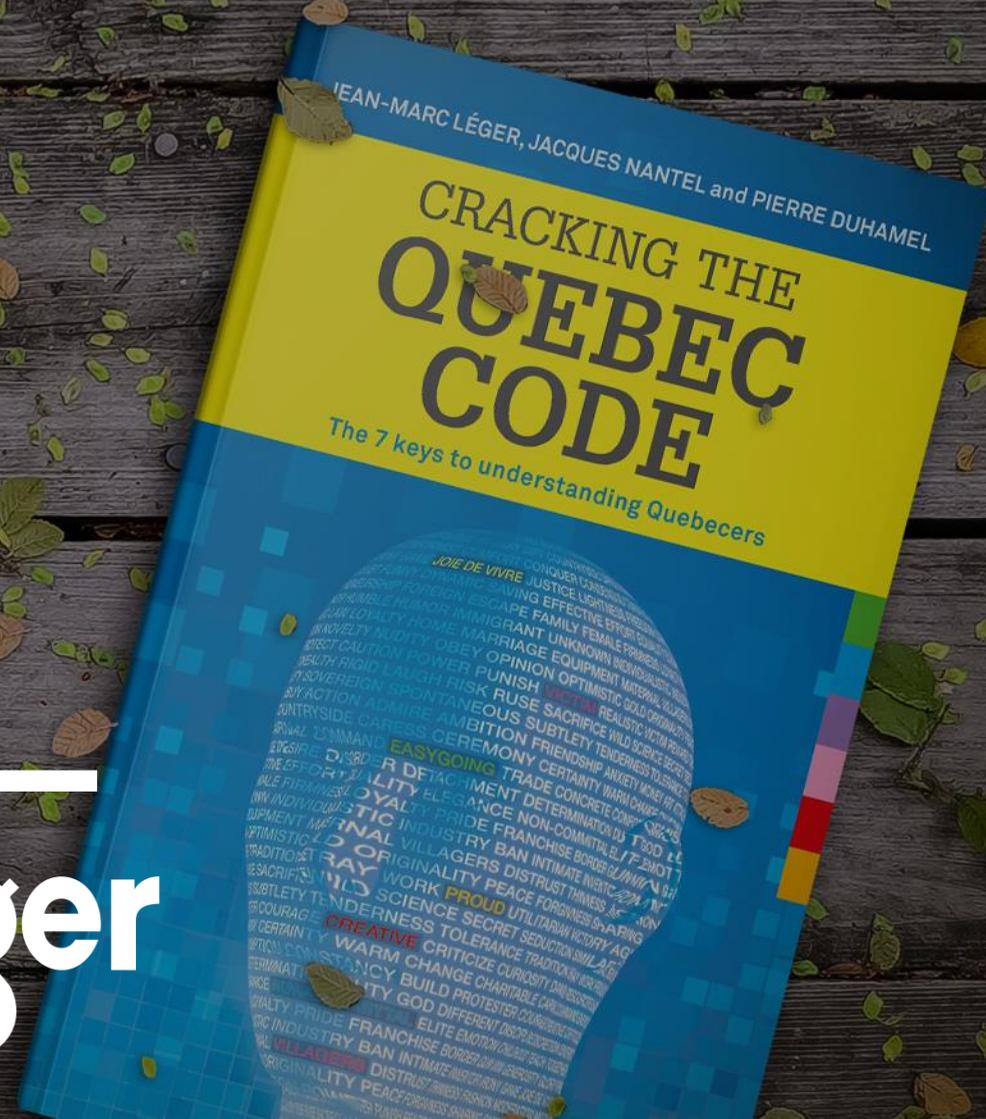


UNDERSTANDING THE

29%

IS THE KEY FOR YOUR
SUCCESS IN QUEBEC

Leger



What are the top words in this list that
make you react most positively?

affection moral honesty

God

stranger ingenuity sensual

certitude marriage soldier

emotion prudence

tolerance savings warmth

What are the top words in this list that make you react most positively?

affection moral honesty

God

stranger **ingenuity** sensual

certitude marriage soldier

emotion prudence

tolerance savings **warmth**

What are the top words in this list that make you react most positively?

affection **moral** **honesty**

God

stranger **ingenuity** **sensual**

certitude **marriage** **soldier**

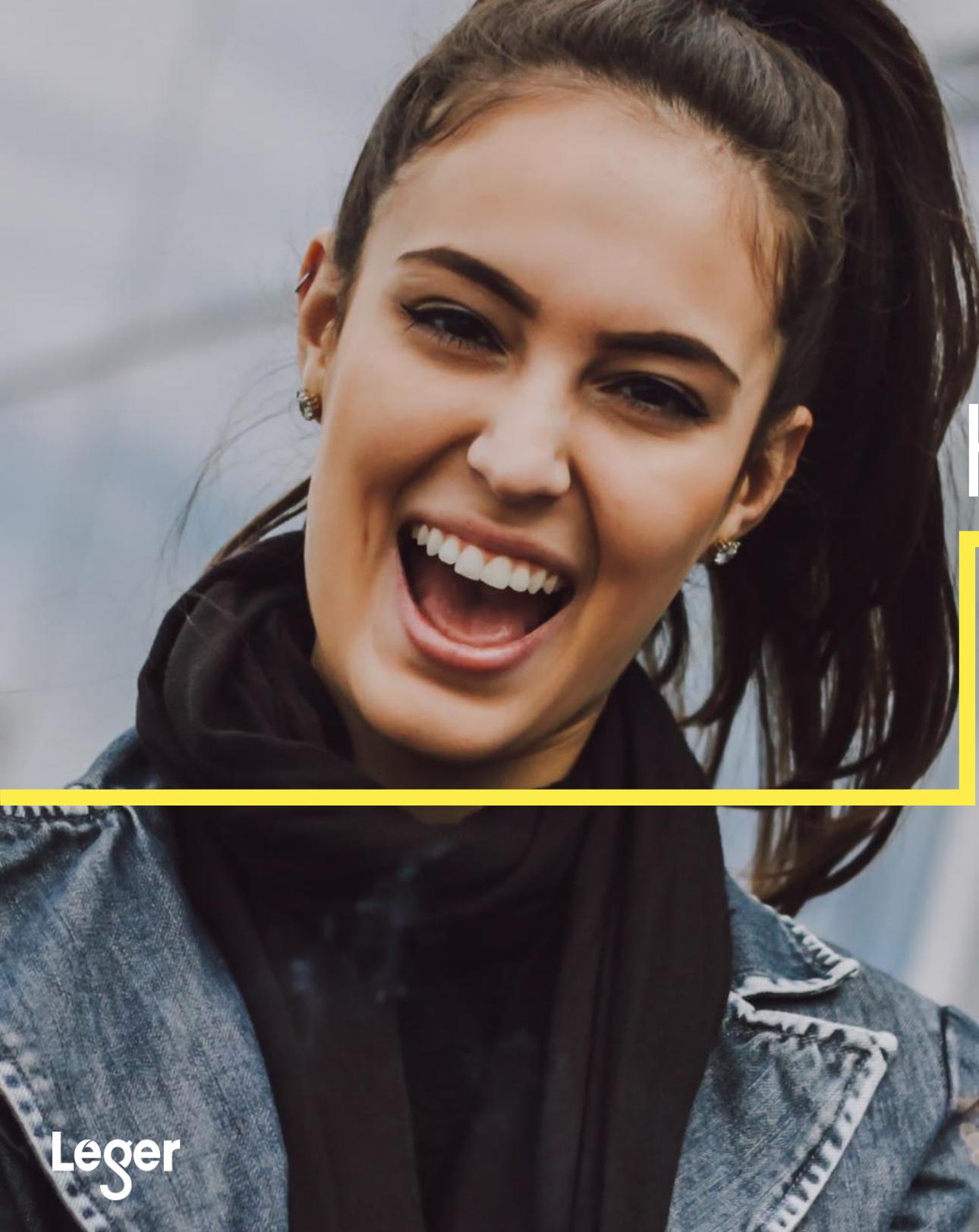
emotion **prudence**

tolerance **savings** **warmth**



JOIE DE VIVRE

Leger



HERE AND NOW

LIVING IN THE MOMENT
OR PREPARING FOR
THE FUTURE?

74% vs 46%

FIRST TRAIT



**Eat better,
feel better
& do better.**



Sobeys



**Vive
la bouffe**

IGA

**23% OF THE CANADIAN
POPULATION**

**43% OF SWIMMING POOLS
INSTALLED**

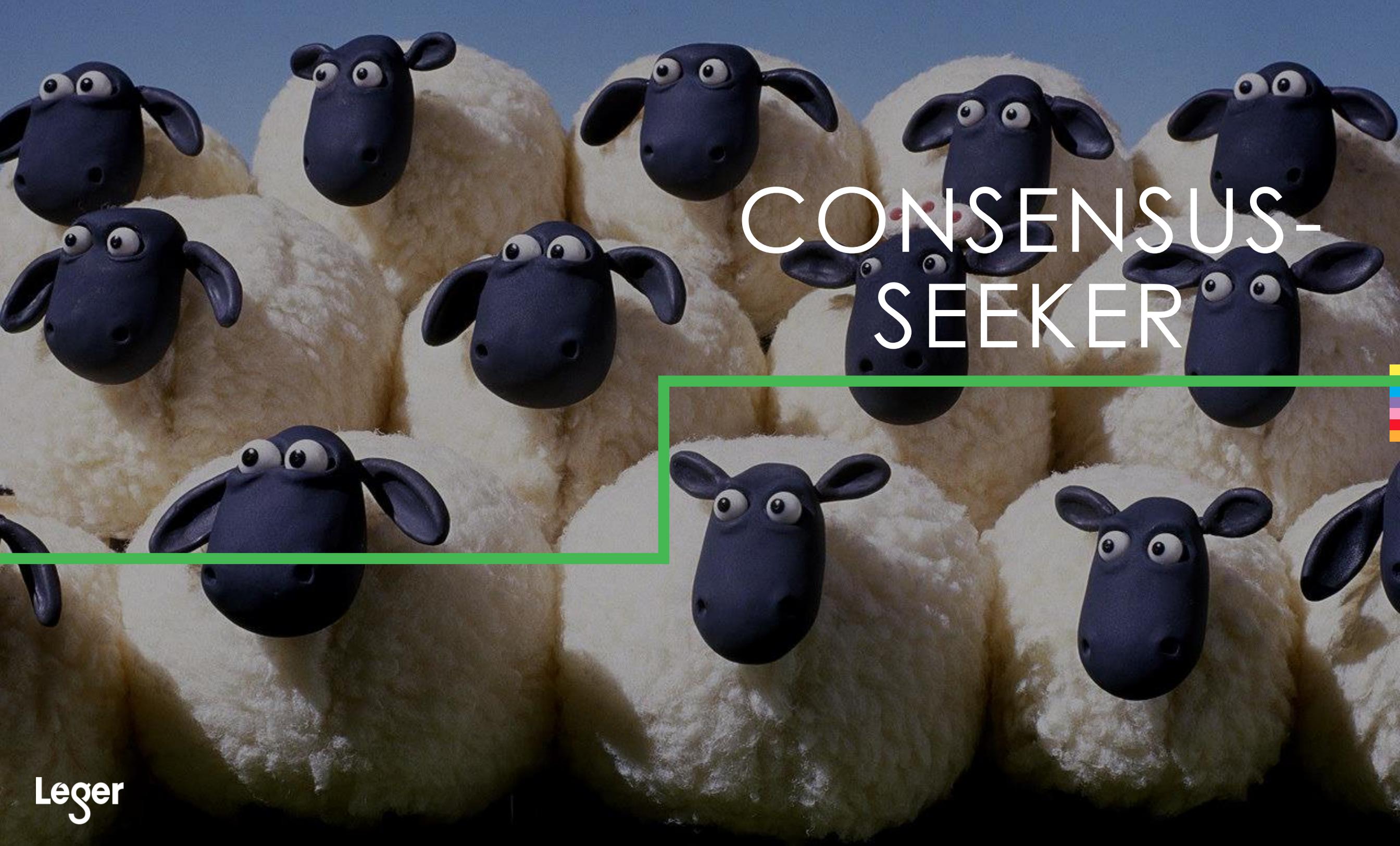
**QUEBEC HAS MORE SWIMMING
POOLS PER CAPITA THEN...**

FLORIDA

CALIFORNIA

Customers, employees and partners

- Replacing should with could
- Short-term thinkers
- What's the emotion coming out of this?
- « Be reasonable » is a tougher sell



CONSENSUS-SEEKER

CONSENSUS-SEEKER

WHAT IS IMPORTANT?
OBTAINING CONSENSUS AT ALL COSTS OR CHOOSING THE BEST OPTION?

51% vs 37%

92% of viewing audience (French Quebec)

3.9 M viewers ... live! 4.3 total



Le seul autre
endroit où on
trouve l'équivalent
du Bye Bye!!

Áramótaskaupið





Customers, employees and partners

- The need to feel they are part of the decision, were consulted
- They want to « jump onboard » but will not jump first
- Consensual, organic, authentic, consultative ...

A woman with dark hair tied back, wearing a black leather jacket, is seen in profile looking out of a train window. The background is blurred, suggesting motion. The overall color palette is dominated by teal and blue tones.

NON-COMMITAL

*“I’M NOT SURE WHETHER
I’M STILL UNDECIDED.”*

*“FOR QUEBECERS IT IS
URGENT TO WAIT.”*

Customers, employees and partners

- They have an issue with commitment
- Behaviours may not match words
- They require more « facetime », the handshake over the memo
- Boots on the ground



VICTIM

“When you encounter an attractive offer, is your first instinct to trust it or distrust it?”

73% vs 56%

MORE SUSPICIOUS



VICTIM

*“THE BIGGEST FEAR IS
THE FEAR OF FAILURE.”*

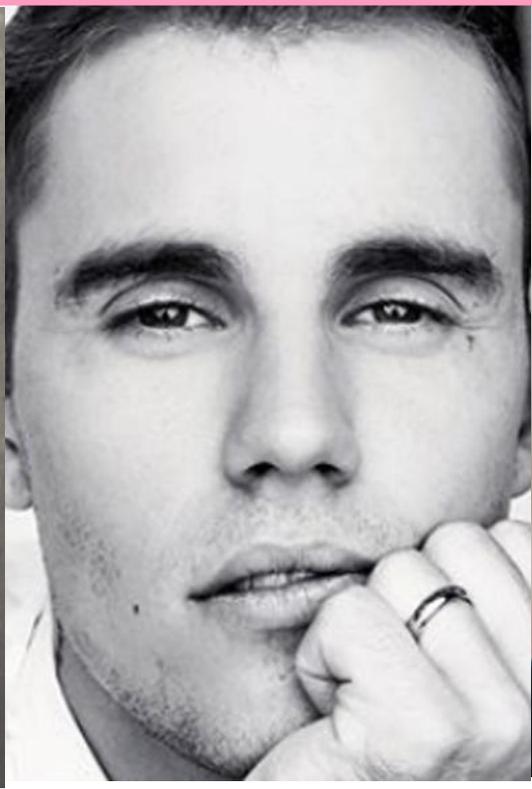
Customers, employees and partners

- It's always somebody else's fault
- Winning their trust will take longer
- Again, they want genuine one-on-one relationships
- Quebecers trust people, not institutions. Boots on the ground

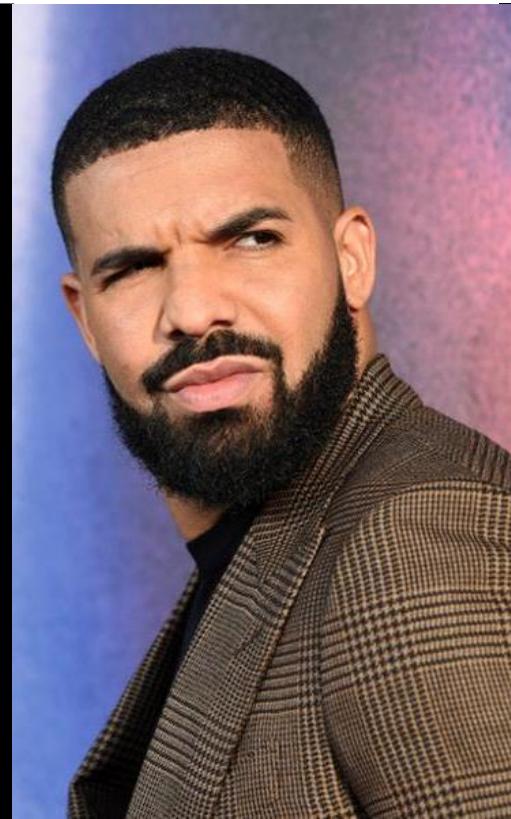
A man with a beard and short hair, wearing a blue and brown plaid shirt, stands in a vineyard. He is smiling and has his arms crossed. The background shows rows of grapevines under a clear sky. A pink horizontal line is positioned below the word 'VILLAGER'.

VILLAGER

Leger



CAN YOU
NAME ANY
OF THEM?
THEY ARE ALL
CANADIANS
WHO WON
**PEOPLE'S
CHOICE
AWARDS**





VILLAGER



CAN YOU
NAME ANY
OF THEM?

THEY ALL
WON
QUEBEC'S
**PEOPLE'S
CHOICE
AWARDS**



Leger

A man with a beard and short hair, wearing a blue and brown plaid shirt, stands in a vineyard with green leaves and clusters of grapes. He is smiling warmly at the camera. The background is a soft-focus view of the vineyard under a clear sky.

VILLAGER

+25%

MORE EFFECTIVE WITH
A QUEBEC SPOKESPERSON
AND USING QUEBEC HUMOUR



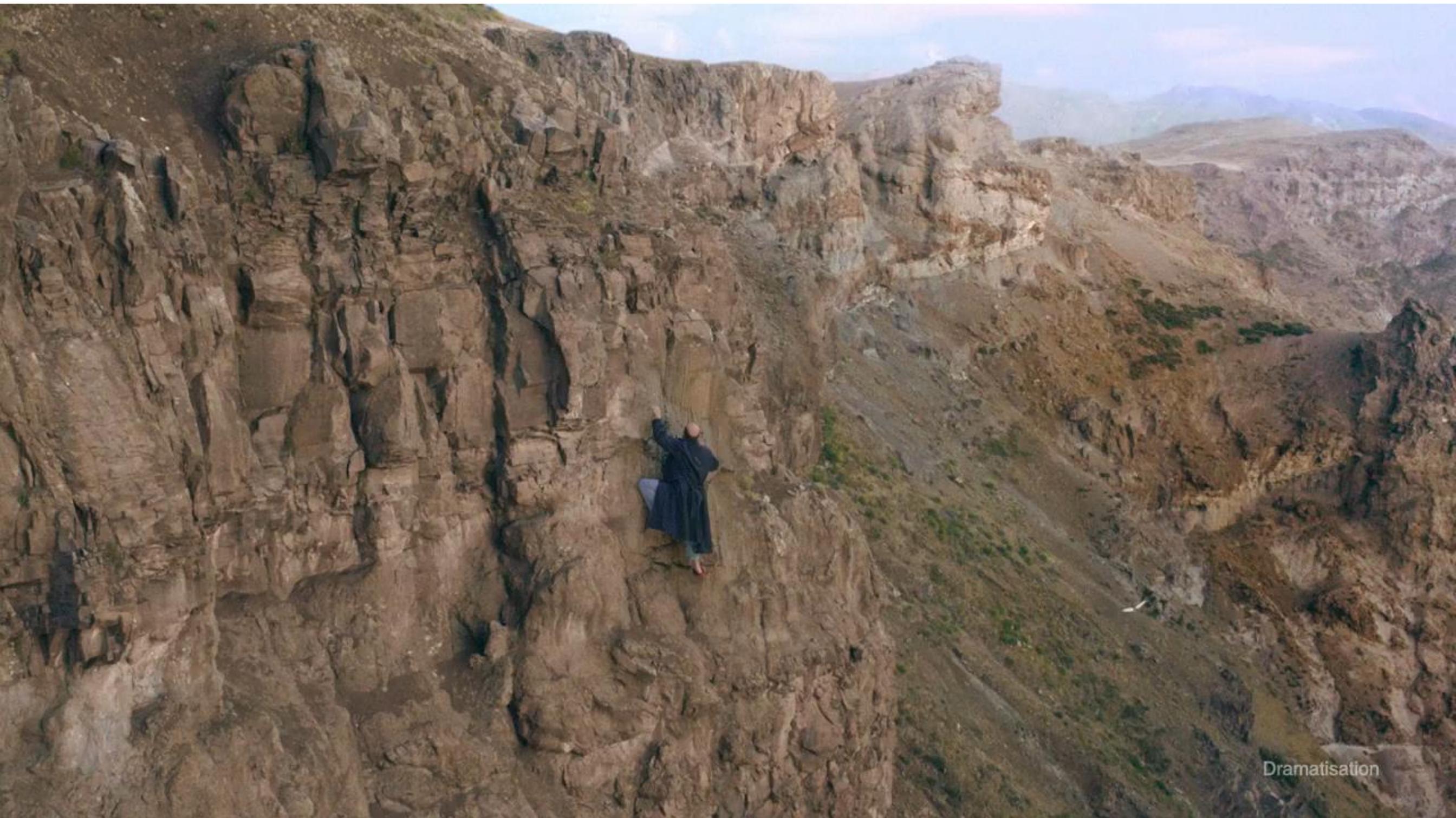
VILLAGER



Leger

An aerial photograph of a rugged mountain landscape. The foreground is dominated by a steep, rocky cliff face with a blue tent pitched on a narrow ledge. The background shows a vast valley with a winding road and distant mountain ranges under a clear sky.

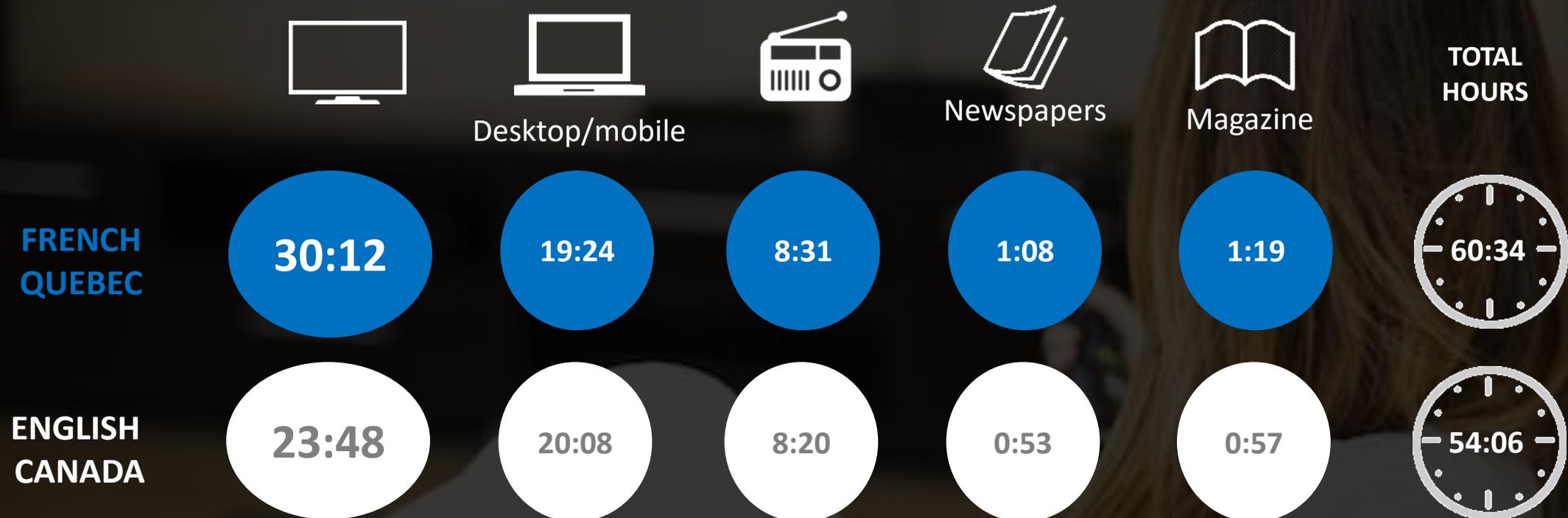
intact
INSURANCE



Dramatisation

TV | MOST WIDELY CONSUMED MEDIA SPECIALLY IN QC

A18+ - Per Week, per capita



Source: (All) Quebec fr., English Canada, A18+, per capita; (TV) Numéris, Fall 2018 (3 sept. - 2 dec.); (Web) comScore multiplateforme, moy. 12 month, nov. 2017 – oct. 2018, population Numeris; (Magazines, Newspapers, Radio) Vividata Fall 2018



IN **50** COUNTRIES
FOR **7** YEARS IN QUEBEC

RATINGS (25-54) :
USA : **2.1**
QUEBEC : **22.4**

38% OF QUEBECERS ARE MORE ENGAGED BY ADS CREATED IN QUEBEC

MORE RESONANCE

TVA

Source : Numeris, French Qc, Spring 2019 (Jan. 7 – May 12), A25-54 / US Deepblue, Nielsen (Feb 2 – May 21), A25-54 *Ratings average of each airing

55%

OF MONTREALERS
SPEAK FRENCH.

BUT OUTSIDE GREATER
MONTREAL?

95%

Customers, employees and partners

- They always want to put a face on things
- They need to feel they are special. They believe they are different.
- Quebec is getting more and more heterogeneous
- Quebec is also the kingdom of coops, mutuels, of the small guy joining forces with other small guy.



CREATIVE

Customers, employees and partners

- May lack self-discipline
- May not like to tow the party line
- Be my own boss, do my own thing
- They tend to frown at cookie-cutter solutions, brands, banners

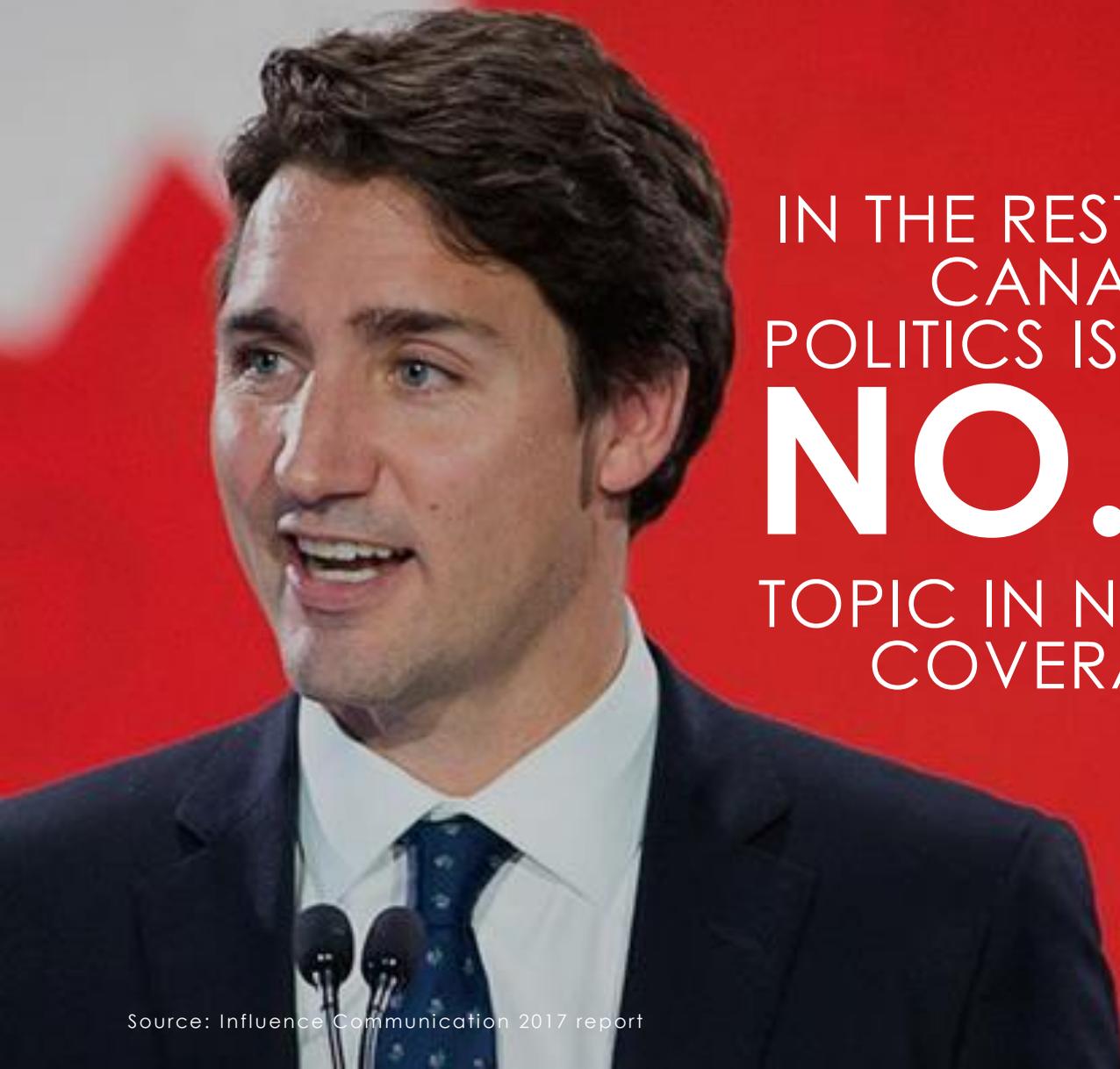


*“ENTREPRENEURIAL SPIRIT
IS THE NEW TREND.”*

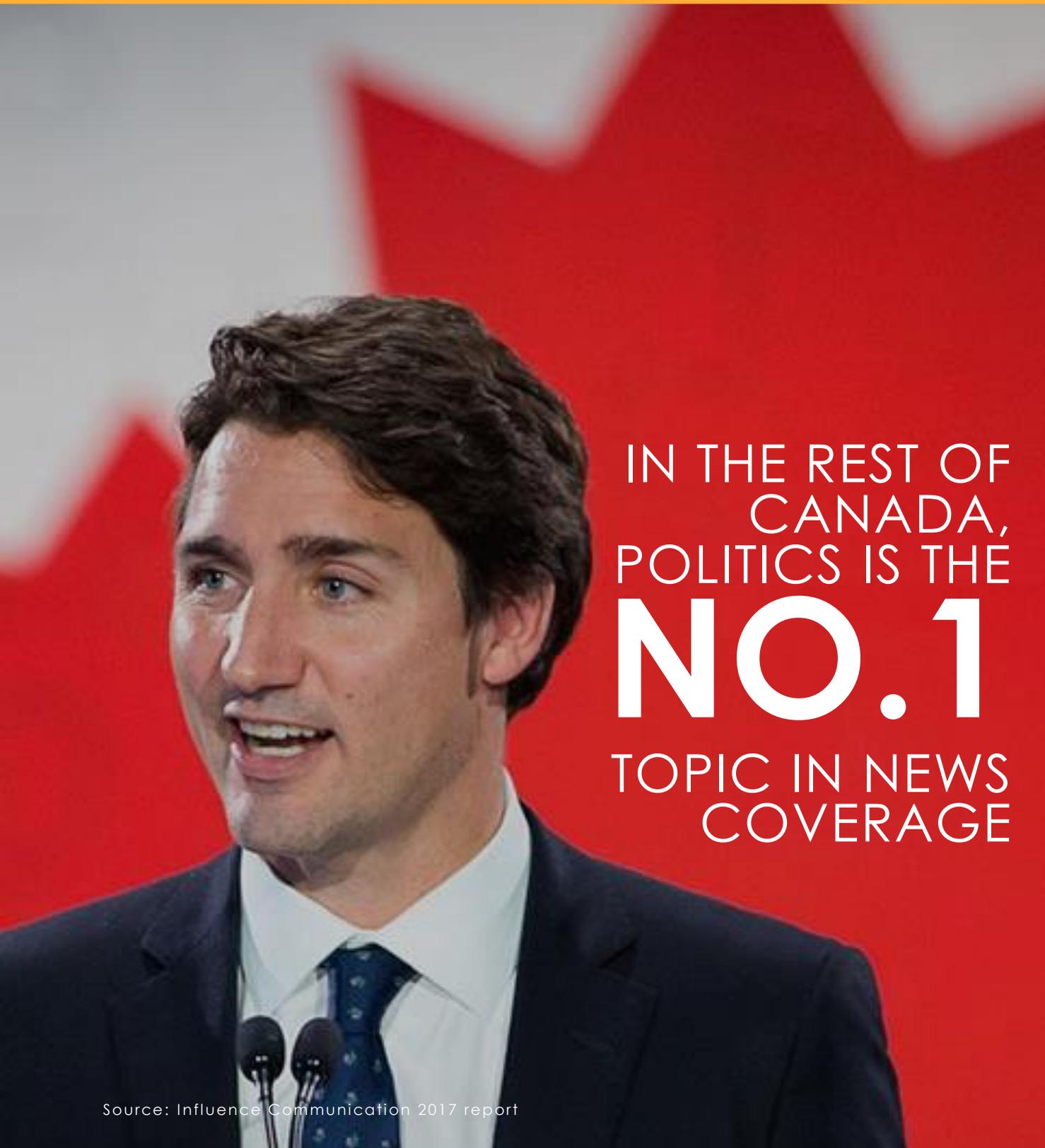
PROUD

INTENTION TO START
A BUSINESS HAS INCREASED
FROM 7% TO 21%
IN LESS THAN 10 YEARS.

PROUD



IN THE REST OF
CANADA,
POLITICS IS THE
NO.1
TOPIC IN NEWS
COVERAGE



IN THE REST OF
CANADA,
POLITICS IS THE
NO.1
TOPIC IN NEWS
COVERAGE



PROUD

IN QUEBEC,
IT IS
HOCKEY!
(WHILE POLITICS
RANKS 5TH)

Customers, employees and partners

- The era of « intrapreneurs »
- Pride in their own work
- They value every inch of autonomy they are given or provided

