



THE QUÉBEC CONNECTION

On the surface Québec consumers seem to be becoming more like consumers in the rest of Canada. But deep differences do remain. Understanding the divergences and commonalities and being smart and strategic about exploiting them can be a major competitive edge.

A SPECIAL REPORT BY STAN SUTTER

For marketers looking to understand and navigate the cultural differences between French Québec and the rest of Canada, things never seem to get any simpler even when things may be getting easier.

In recent decades Québec consumers and many of the drivers of their brand preferences and purchase decisions have increasingly aligned with English Canada and the rest of North America. The opportunities for companies who may have shied away from Québec or underperformed there in the past to cost effectively use or adapt existing English strategies and creative have increased significantly. This is no small matter when you consider that, depending on the product category, Québec accounts for 20% to 25% of the Canadian market. Even incremental improvements in share, margins and profitability there can make a big difference.

And yet, real differences remain. Certainly many of the clichés about unique aspects of the Québécois character have faded. But many of the differences are still real and can arise in surprising ways. Marketers still run the risk of alienating huge portions of their target market through carelessness and inadvertent slights.

But, marketers need not be fearful. After all, if Molson Canadian can make serious headway in winning over French Québec consumers, there's hope and opportunity for all.

You read that right. Molson Canadian, a brand that for generations has traded on flag-waving English Canadian national pride to power its status as one of the country's most popular brews – and effectively ignoring Québec in the process – is actively marketing to Francophone Quebecers. And it is actually making some progress with them these days.

Moreover, Molson Coors Canada is using essentially the same strategy and creative approach there as in the other parts of the country and the rest of the world with, of course, some carefully calibrated nuances. Its efforts provide some revealing insights into both how French Québec consumers are unique from the rest of Canada and how they are also in many ways fundamentally similar.

If there's an English Canadian brand that ought to have serious issues with navigating the complex nuances of the Québec consumer market, it would have to be Molson Canadian. Launched in 1959, just as Québec's Quiet Revolution began gathering steam,



C'EST DANS NOTRE NATURE.



MADE FROM CANADA

Rethink made small but important changes to its national Canadian ads for French Québec

Canadian has been for decades among the most popular brews in English Canada, and its marketing often a rare touchstone of overt English Canadian pride and nationalism. Indeed, the Canadian “Rant” spot at the turn of the millennium mushroomed into a true home-grown pop-culture phenomenon in English Canada – the likes of which is usually reserved north of the 49th parallel for the hit movies, TV shows and pop songs that emerge in the unique Québec “star system” protected by language and a much stronger sense of common tribal identity than exists in the Rest of Canada. As to be expected, however, Joe Canadian and his maple leaf waving Anglo Canadian chauvinism left Quebeckers cold.

In 2012, Molson Coors, the world’s seventh largest brewer formed in a merger of Molson with Colorado-based Coors Brewing, saw an opportunity to build Molson Canadian into a significant global brand. As an important first step on that path, Molson Coors needed to establish Canadian as a leading brand in every region of its home country.

“Québec is Molson’s largest region in Canada, where we have a very strong and growing share position,” says Peter Nowlan, the Toronto-based Chief Commercial Officer for Molson Coors Canada.

“More importantly, it is also where our company began. Molson Coors is the oldest brewery in North America. It all started back in 1787 on the shores of the St Lawrence, where our brewery still stands today. So, while we are an international company, our roots are in Québec. Winning with Québec consumers is critically important to Molson Coors.”

Molson’s then new-ish national agency Rethink Communications, based in Vancouver with a Toronto office, was given the task of developing the new break-out global and national campaign for Canadian.

To ensure that whatever was developed also resonated in Québec, Molson Coors also brought the strategic consulting firm Headspace Marketing to the table. Although headquartered in Toronto, Headspace is dedicated to helping national and international brands thrive in the Québec market.

Headspace quickly determined that the strategy and core repositioning that Molson Coors and Rethink was developing for Canadian had the potential to strike a number of important chords with French Québec beer drinkers.

“Despite the potential barriers and challenges Molson Canadian may face in the Québec market,” Headspace president and founder Éric Blais reported to Molson Coors at the time, “the current statement of the brand positioning is remarkably void of the ‘Canadian-ness’ and national pride of past campaigns that focused on and leveraged the Canadian identity.”

The brand beliefs outlined in the strategy were “fairly universal and are likely equally shared by brand prospects in Québec: simple, honest pleasure – breaking away from boring – connecting to nature,” Blais says now.

Headspace advised Molson Coors not to try to “act local” with Canadian. Doing something different and special for Québec would be seen as insincere. Better to market the beer in Québec almost as you would in other countries.

As a result, the English positioning line “Made from Canada” became «C’est dans notre nature» (“It’s in our nature”) for Québec, while leaving the positioning and imagery largely unchanged.

“We guided the strategy, and Rethink came up with the French version of ‘Made from Canada,’” says Blais. «C’est dans notre nature» became a way to tap into common elements of northern pride, without invoking potentially polarizing and politically loaded words in Québec like “nation,” “ici” or “chez nous.”

Says Molson Coors’ Nowlan: “The organizing idea «C’est dans notre nature» links the product story of a brand that is brewed locally, with 100% Canadian

ingredients with the heritage of the Molson brand in Québec and Quebeckers' love of life."

"Headspace was very effective working with our marketers and other agency partners to help hone the insight and tell our story," Nowlan says. "In particular, they helped advise what parts of our brand story would resonate most effectively in Québec, and how we connect in a very authentic and local way."

"Molson Canadian is now experiencing rapid growth in Québec," says Nowlan, who advises marketers approaching the Québec market to do what they'd do in any other new market. "Be authentic, genuine and real," he says. "Look for brand values that are part of your brand history and resonate locally and lean into these."

find its offering and brand personality was something Quebeckers were already predisposed to support.

"We were surprised that consumers were so quick to adopt something new, especially ACE's Baguette, and prove that a Toronto-based bakery can be significant in this mature market," Gaudet says. "We proved that consumers in Québec really are seeking to elevate the eating experience and are exploring for new ways to do so."

"You can't presume that your Anglophone (non-Québec) campaign or programs will or won't work in the market," Gaudet says. "Partners like Headspace are very well informed and are in touch with the market."

When a segment on Radio-Canada's TV food program *L'épicerie* on the best baguettes in Québec rated



Headspace introduced ACE Bakery to bread-loving Quebeckers

ACEING QUÉBEC

That kind of advice doesn't just apply to multinationals and big global brands. ACE Bakery, an Ontario-based marketer of artisan breads, adopted pretty much the same thinking when it sought to expand into the neighbouring province in 2012.

Founded just over 20 years ago by a hobbyist couple experimenting with home-made baguettes on weekends in their country home north-west of Toronto, ACE was purchased by Weston Foods for \$110 million in 2011, although ACE retains its artisan heritage. And it by no means has budgets comparable to a national beer brand to work with.

While the Québec market is large, it is also mature and rich with credible competitors, says Philippe Gaudet, Director – Marketing & Communications for ACE. "Consumers have viable 'local' options and we wanted to ensure that our approach in the province was respectful and mindful of regional preferences. After achieving broad distribution almost overnight in Québec and having carefully built the ACE brand in Ontario for 20 years, the challenges of staying true to the brand's DNA while adapting national programs to resonate with Quebeckers where the brand was new were significant."

ACE retained Headspace to help and, like Molson Coors with Canadian, it was pleasantly surprised to

ACE's product number one last year, Headspace quickly pulled together a PR push and point of purchase materials. And the efforts were not limited just to Québec.

"The Québec market is regarded as the most sophisticated bread market in North America and this message of regional preference was news that we wanted all trade partners to hear," says Gaudet. "Headspace sourced the clip, edited it and subtitled it for our teams to share. They also helped develop signage solutions for our point-of-sale efforts and helped deliver the message to more consumers. The response was excellent."

BEING SMART AND STRATEGIC ABOUT QUÉBEC

The ACE experience of being able to leverage a success or learning in Québec back into its English Canadian and North American marketing is hardly unique.

"As marketers we can also learn from the region, and in some categories, Québec is at the leading edge of innovation and often early adopters of new products and categories," says Serge Rancourt, chief operating officer of the Toronto agency doug & serge whose national clients include Miele and Canada Goose. "The great majority of our clients have a presence in Québec and have a vested interest in getting their fair share of business."

Rancourt, a Quebecker who has worked for more than two decades in Toronto with agencies like Publicis



“We should be asking ourselves how we can more effectively grow our brands in a geographic market that represents a quarter of Canada,” says **Éric Blais**.

“There has to be a ‘business case’ for Québec and the opportunity it represents.”

Canada, Young & Rubicam and most recently as a partner in doug & serge, notes that the relatively small size of the Québec market poses a challenge for even the largest marketing organizations. Small budgets mean that unique creative approaches for the province are often out of reach, or are pursued haphazardly.

“I have seen many marketers harming themselves in Québec by trying to cut corners and think nobody will notice. It shows a disregard for French-speaking people, and can lead to irreparable damage for their brands,” says Rancourt. “Do it right or don’t do anything.” And if you do do it, be sure to have an advisor who knows Québec intimately. And engage them early.

“I worked in Germany for three years on Pan European campaigns [for Ford], which was like dealing with 20 different markets at the same time,” Rancourt says. “From the beginning of the strategic process throughout the creative brief, creative development, evaluation and research, all parties involved understood the campaign needed to work across Europe. Unfortunately, for some Canadian marketers, Québec is often an afterthought. And it shows.”

Jill Nykoliati, president of Toronto agency Juniper Park – whose national clients include Virgin Mobile, CIBC and The Source – echoes Rancourt’s advice about being informed and strategic about marketing investments in Québec.

“Often times marketing budgets don’t allow for a robust Québec-specific solution,” says Nykoliati. “But that doesn’t mean the default option should be

to simply translate the English creative. It doesn’t have to be that black and white. Invest in understanding what the size of the untapped opportunity is, and what it would take to achieve it, so if you could get funding, you’d know what you’d need.”

MORE THAN JUST A DIFFERENT LANGUAGE

Simon Blanchard, Assistant Professor of Marketing at Georgetown University’s McDonough School of Business in Washington D.C., also stresses that marketers need to do their homework before jumping into the Québec market.

“Spend some time on determining your market potential that is specific to Québec,” Blanchard says. “If it’s significant, don’t make the call to a translation company too quickly. A small investment in preliminary Québec-focused market research can go a long way in preventing your marketing dollars from being wasted. You might learn that going with the global approach will be just fine, but why take the risk?”

A native French Canadian who was educated in Montréal at HEC Montréal and at the Université de Sherbrooke before heading to the U.S. to earn a PhD in marketing at Penn State, Blanchard says marketers need to realize that what makes Québec unique often has nothing to do with language.

“It’s easy to think that the biggest difference comes down to language, it goes well beyond that,” Blanchard says. “The socio-demographic and cultural differences between Quebecers and the rest of Canada can have significant influences in consumption decisions. Quebecers satisfy their needs differently.”

Exploring such differences really can drive decision-making about what, if any, opportunities to pursue. The pay-offs from taking the time to figure out how your brand can connect in unique ways with Québec consumers can be huge.

“Once a connection is established between Quebecers and a brand, it can go a long way in protecting against new market entries, even ones that come with a ‘same-for-less’ value proposition,” Blanchard says. “Despite strong entries of low priced retailers in Québec (for example, Walmart), it takes a lot for Quebecers to move away from well-established brands such as Canadian Tire, Jean Coutu, and IGA. Quebecers are very loyal shoppers, and all that effort can lead to very strong long-term returns.”

ADOPT, ADAPT OR CREATE

Headspace Marketing works directly with clients like Molson Coors and ACE Bakery as well as being brought in on multiple national accounts through arrangements with Juniper Park, doug & serge and several other Toronto-based national agencies such as MacLaren McCann and john st.. And it approaches each brand as a unique proposition.

“Successful brand building in Québec is knowing when to adopt, adapt or create for Québec,” Blais says echoing the Headspace mantra. Developing new creative approaches for Québec may indeed break through in the market, but it might not be viable given the budgets available. And even if the budget is available, it might not be the best, most effective option.

For Blais, there are probably only a handful of global brands that can use their global and national English campaigns for French Québec without any changes. That short list includes Levi’s, Jeep and Apple.

“When Apple shows what a child can do with an iPad, it speaks a universal language,” Blais says. “Even if the size of the market were to warrant a separate investment in brand-building, it would almost be counter to Apple’s DNA to suddenly sound Québécois.”

Isabelle Cardinal is the Montreal-based creative lead at Headspace (while Blais and the Headspace account management team are based in Toronto, the creatives work out of Montreal to ensure they stay immersed in the Québec cultural milieu). A copywriter, Cardinal has produced award winning campaigns for the likes of GM, McDonald’s, Bell, Kraft and National Bank while working with leading Québec agencies such as Cossette, lg2 and Bos.

“There are times when a concept developed in English can be adapted into French rather easily,” Cardinal says. “However, generally, the cultural references and the play on words just can’t be directly ‘transposed.’ We have to return to the original brief and find a unique way, one that has a Québécois flavour, to communicate the same strategy. In fact, this becomes original creative, with the added challenge of respecting the tone and spirit of the English concept.”

One of Cardinal’s most successful “transcreation” efforts was for Durex condoms. The original English campaign created by MacLaren McCann built on the theme of the “Durex Hump Day,” suggesting Wednesday as a great day for sex. Unfortunately, the English double entendre notions of “Over the hump” and “humping” are meaningless in French. As an alternative, Cardinal created the «Cinq à sexe de Durex», a play on the 5 to 7 pm post work happy hour.

A more recent English ad concept for Prostate Cancer Canada from doug & serge also needed a similar “transcreation” makeover before it would make any sense to a French Québec audience. The image showed a pair of buttocks instead of a head with the English headline “Only a butthead wouldn’t get his prostate checked.” But, again, the phrase “butthead,” while universally understood in English, is virtually unknown in French. Headspace found a French expression that could deliver the same message and work within the creative idea: «Seuls ceux qui n’ont pas de tête sur les épaules ne passent pas d’examen



de la prostate». (“Only those without a head on their shoulders do not get their prostate checked.”)

“My greatest satisfaction,” says Cardinal, “comes from having created a French adaptation of a concept, a slogan, or even just a headline that is even more clever than the initial English text. And when the clients themselves, probably expecting that something would get lost in translation, are pleasantly surprised. That’s the proof that, in the word ‘transcreation,’ the word ‘creation’ is really meaningful.”

Adapting an English campaign also has its creative challenges.

Blais points to Virgin Mobile as one of the most extensive ongoing “adapting” exercises Headspace has been involved with. Early in the 2000s, Virgin had ensconced itself across Canada as the “consumer champion” brand in the mobile phone market. But as the decade drew to a close, Virgin found itself faced with a host of new competitors, such as Koodo and WIND Mobile, muscling in on that value turf.

Virgin worked with its new national agency, Juniper Park, to develop something radical to set itself apart again. They found it in the simple consumer truth that youth need to “belong.” So it reinvented itself for the highly social and exclusive proposition of membership. Headspace was involved from the start, and continues to be involved, to ensure that Virgin’s “brand narrative in Québec reflects the brand’s character while being culturally aligned with the target group in Québec,” says Blais.

“Virgin Mobile’s brand platform is iconic everywhere in Canada, including Québec,” says Juniper Park’s Nykoliati. “For the past four years, we’ve partnered with Headspace to seamlessly adapt the platform for that market. Adapting doesn’t mean translating copy – they translate youth culture. Understanding that nuance is the key.”

“The difference between good vs. great marketing in Québec often comes down to a nuance in culture,” Nykoliati says. “Understanding how to mine that nuance can take you from a butter knife to a steak knife.”

“We keep talking about differences – and there certainly are many – but that’s not what we should be concerned with, at least not initially,” says Blais. “There has to be a ‘business case’ for Québec and the opportunity it represents. In my experience, you won’t build a compelling case by starting with the differences.” ♣

— Stan Sutter is a former Editorial Director of Marketing Magazine.

Virgin agency Juniper Park works with Headspace to ensure all campaigns seamlessly align for English and French targets



GETTING INTO THE HEADSPACE OF QUÉBEC

A few members of the Headspace team (from left): Patricia Assabe, Project Coordinator; Manon Varin, Director of Project Management; Éric Blais, President; Isabelle Cardinal, Creative Lead, and; Célia Bergevin, Project Manager.

When Éric Blais graduated from Québec City's Université Laval in 1983, he promptly embarked on an atypical career path for a Francophone Quebecker: account executive with a major Toronto ad agency. He hasn't stopped living in Toronto since then, although he also never strayed far from his French Québec heritage.

Over the next two decades, Blais took on increasing senior account management, client services and strategic planning roles with some of English Canada's biggest and best agencies. At shops like Young & Rubicam, Harrod & Mirlin Advertising, Roche Macaulay & Partners, Publicis Toronto and MacLaren McCann, he worked with major national and international marketers and brands such as General Foods, Colgate-Palmolive, Levis Strauss, Nabisco and Rogers.

At meetings Blais would inevitably find himself as the only "French-speaking Québec-born marketer in the room." And while Québec was seldom the primary focus of his duties, he would inevitably find himself being asked questions about the market. How is it different from English Canada? What should marketers do to successfully appeal to her consumers? What does Québec want anyway?

So it was seemingly inevitable that Blais would set up his own Toronto-based strategic consulting

firm dedicated to answering those questions. Since opening its doors in the summer of 2004, Headspace Marketing has been all about demystifying Québec and helping clients address the unique opportunities and challenges the province offers.

A decade on, Headspace has teams operating out of offices in Toronto and Montréal and provides a complete menu of marcom services. These range from brand strategy consulting, to French adaptation and "transcreation" of national English and global campaigns and even creating completely new marketing solutions and creative executions. Clients Headspace has worked with include Weston Bakeries, Molson Coors, Virgin Mobile, Kraft Foods, Mars, Tim Hortons, Mitsubishi, CIBC and Capital One, often also in close tandem with their Toronto-based ad agencies and other marketing partners.

From the start Blais and Headspace took the posture that there's never a fixed, standard answer to the question of how to crack Québec. The answer almost always amounts to: it depends. Depending on the brand's global or national positioning, and depending on how aligned Québec consumers attitudes are with national and international norms, a marketer may or may not have to take a significantly different approach to the province.

You have to look at each situation on its own terms and not go in with preconceptions, Blais says. "We

always advise clients that the options boil down to adopting or adapting your existing creative or creating new advertising. The trick is to understand the market and its people well enough to make the correct choice.”

“To successfully operate in Québec, truly understanding and addressing local nuances is important,” says David Garrett, Vice President, Marketing with Weston Foods, the national baking giant headquartered on the west side of Toronto. “Marketers may believe they are reaching the Québec consumer by simply adding a French translation to their English marketing elements, and sometimes that can work. But we want to really connect with our consumers in unique ways they appreciate.”

Weston worked with Headspace in Québec on a number of brands, including the nationally marketed Country Harvest® and the local brand Gadoua Moelleux®.

“Headspace has local understanding and significant insights to connect with Québec consumers, and not just talk at them,” says Garrett. Headspace, he adds, is “wired into the significant, and less significant, aspects of daily life and are experts at translating their impressions into hard-working ideas which marketers can put into practice. This is especially important for marketers who may not have an office or live in Québec.”

Molson Coors tells a similar story.

“Headspace acted as a strategic consultant and has helped us to adapt our Molson Canadian strategy when we decided to increase our marketing efforts in Québec in 2012,” says Peter Nowlan, Chief Commercial Officer for the global brewer, which despite its roots as Québec’s – and North America’s oldest brewer – now runs its Canadian marketing from Toronto. Nowlan was especially pleased with how effectively Headspace was able to work with Molson Coors’ other agency partners. That ability to “play well with others” is something Headspace’s agency partners appreciate.

“They are good with clients and respectful of our existing relationships,” says Serge Rancourt, the chief operating officer with the Toronto agency doug & serge. “Working with Headspace, we have been able to optimize our clients’ budget by engaging them early in the process.”

Toronto-based agency Juniper Park partners with Headspace on several accounts including CIBC, Virgin

“Headspace helps us identify the right approach for our clients to win in Québec,” says Juniper Park president Jill Nykoliation, “and then works with us adopting, adapting or creating the creative assets.”



Mobile and The Source. The agency’s president Jill Nykoliation describes Headspace as a “strategic and creative partner.”

“They help us identify the right approach for our clients to win in Québec, and then work with us on adopting, adapting or creating the creative assets,” Nykoliation says. “They are a seamless extension of our team.”

As important as Headspace’s deep and nuanced understanding of Québec culture is, Nykoliation believes the company’s solid grounding in the strategic rigor of brand building is what sets it apart.

“Despite language or cultural differences, we are building one brand together,” she says. “Headspace excels at both, which few can say. It comes from the top – Éric Blais led the strategic planning departments at some of Canada’s best agencies. So our connection with him starts at understanding the business strategy.”

Doug & serge’s Rancourt readily agrees. “Éric’s background as a strategic planner gives Headspace the ability to get involved at the strategy level first, validating the strategy prior to briefing the creative teams,” he says. “This helps us make early decisions around ‘adopt, adapt, create,’ the core of Headspace’s creative philosophy.”

Juniper Park’s Nykoliation also thinks Headspace’s physical model of offices in both Montréal and Toronto is particularly smart. “While their creatives are in Québec so they are tapped into culture, the rest of the team is in Toronto. That means Éric and team are in the head office discussions where the strategy conversations are happening.”

Says Weston’s Garrett “If I had to start anew or expand existing marketing efforts in Québec, knowing what I know today, my first call would be to Headspace.”

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WHAT QUÉBEC WANTS: ANSWERED

- Joyful living - The proverbial “joie de vivre” is real, and Quebecers are more apt to seek pleasure in all aspects of their lives
- All about me - Quebecers are quicker to ask “what’s in it for me,” and can be relentless in pursuing what they want
- Life uncomplicated - Quebecers seek simplicity in all things, and will reward those who deliver it for them

“These connectors greatly influence how Quebecers relate to the world around them as people and as consumers,” Blais says. “Brands that align their appeals with these connectors have a greater chance of establishing deep connections with their target consumers in Québec.”

“‘What Québec Wants’ is a terrific asset for us, and Headspace clients,” enthuses Jill Nykolation, president of Toronto-based agency Juniper Park. “Real time, quantitative insights about the Québec consumer, by category. Winning in Québec starts with strategy – it isn’t merely a creative approach.”

FOR ALL THE TALK ABOUT THE

uniqueness of Québec consumers, Éric Blais has always felt there is a surprising dearth of substantial objective data and research to back up just how the market is different from the rest of Canada.

To remedy that, Headspace worked with David Saffran Consulting to create the “What Québec Wants” syndicated study, which debuted in early 2013 and will see a second edition later this year.

“Our partnership for the ‘What Québec Wants’ study was based upon Éric’s content expertise and my own process knowledge from over thirty years as a market research practitioner,” says the Montréal born and bred Saffran who was a senior VP with Ipsos before hanging out his own market research shingle.

After an initial short survey to test Headspace Marketing’s hypotheses regarding key drivers of Québec consumers, supporting subscribers signed on (including companies like Capital One and TD Bank Group) and the detailed survey was developed. The aim, says Saffran, was “to investigate the key values and attitudes driving buying behaviour or ‘Connectors.’ In addition, the survey was designed to look at market dynamics or ‘Influencers’ on those behaviours.”

An essential element of the study is its baseline comparison of the Québec market with the rest of Canada (ROC), while providing “a deep-dive within Québec,” says Saffran. “To that end, our sample was drawn from 1,000 Canadian adult heads of households living in the ROC and another 2,000 from Québec. This deliberate over-sampling of Quebecers permits very detailed analyses of the Québec consumer and key market segments.”

The study identified five “heartstrings” as Blais calls them, that are the most significant ways in which Québec consumers differ from their English Canadian cousins:

- Living in the moment - Quebecers are more likely to “seize the day” and worry less about what the future will bring
- Chez nous - Quebecers’ sense of place is central to their identity, and they’ll enthusiastically support things that reinforces local pride

“These connectors greatly influence how Quebecers relate to the world around them as people and as consumers. Brands that align their appeals with these connectors have a greater chance of establishing deep connections with their target consumers in Québec.”

