

## UNPACKING THE MEDIA HABITS OF QUEBEC'S BIGGEST CITY

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Almost anyone in media can tell you that Quebec is an incredibly unique market.

With a province full of consumers who are fiercely loyal to homegrown media, and a market that is sometimes underserved by big global platforms like Netflix (which has been criticized by some for lacking in French-language content), the Quebec market poses just as many opportunities as it does challenges for brands.

Now, a new study by the Media Technology Monitor looks at Montreal specifically. As the province's largest city with just under two million on the island proper, Montreal's demographics differ slightly from the broader province.

According to StatsCan, 23.4% of its population (as of 2016) are immigrants, nearly double that of the province as a whole. More than one-fifth of the population (22.6%) are visible minorities, compared to 13% in the whole of Quebec. And, perhaps the biggest difference between Montreal and the broader province is the number of people who speak English. In Quebec, only 9.6% of the population declare English their mother tongue, and 19.8% say they speak it at home. In Montreal, more than half of its residents are bilingual, while languages other than English and French are on the rise.

MTM's reports show how a multicultural, metropolitan lifestyle affects Montreal's media appetites, compared to Quebec as a whole.

For example, even though Quebec-based Francophones are slightly more engaged in traditional television than the rest of Canada, Montreal's Francophone population over-indexes in terms of online-only TV consumption, at 11% of the population (versus 9%).

Digital permeates across Montreal's media consumption habits; Francophones in the city over-index slightly on ownership of all internet-connected devices, including laptops and desktop computers, smartphones, internet-connected TVs, tablets and smart-speakers. Smart-speakers among Montreal Francophones currently sit at 12%, versus 10% for the whole province. That puts Montreal closer to the national penetration rate of 19%, although there's still ground to make up. In September, Amazon's Alexa system introduced French capabilities, something the Google Home speakers entered the market with.

They also over-index significantly on SVODs, with 56% of the population subscribing, compared to 49% across the province. Netflix is more dominant among Montreal Francophones (40%) than the rest of the province (34%). Canadian streamer Crave isn't particularly popular among either population (4% among

Montreal Francophones, 3% among Quebec Francophones), but that could soon change given Bell Media's recent announcement that it would launch 250 French-language titles on Crave this month.

Montreal-based Francophones are also more likely to watch online TV content, whether from an SVOD or a broadcaster (68% versus 61%) and online news videos (44% versus 38%). Online audio is also bigger for residents of the city, which over-indexes on subscription music services (39% versus 30%) and podcasts (17% versus 14%).

Traditional TV news is the only content in which Montreal's Francophones under-index compared to the rest of the province. The group under-indexes slightly on watching network news (65% versus 66%), particularly Canadian news networks (57% versus 61%).