



Distinct and Dynamic

The Ultimate Guide
to the Québec
Consumer

NielsenIQ

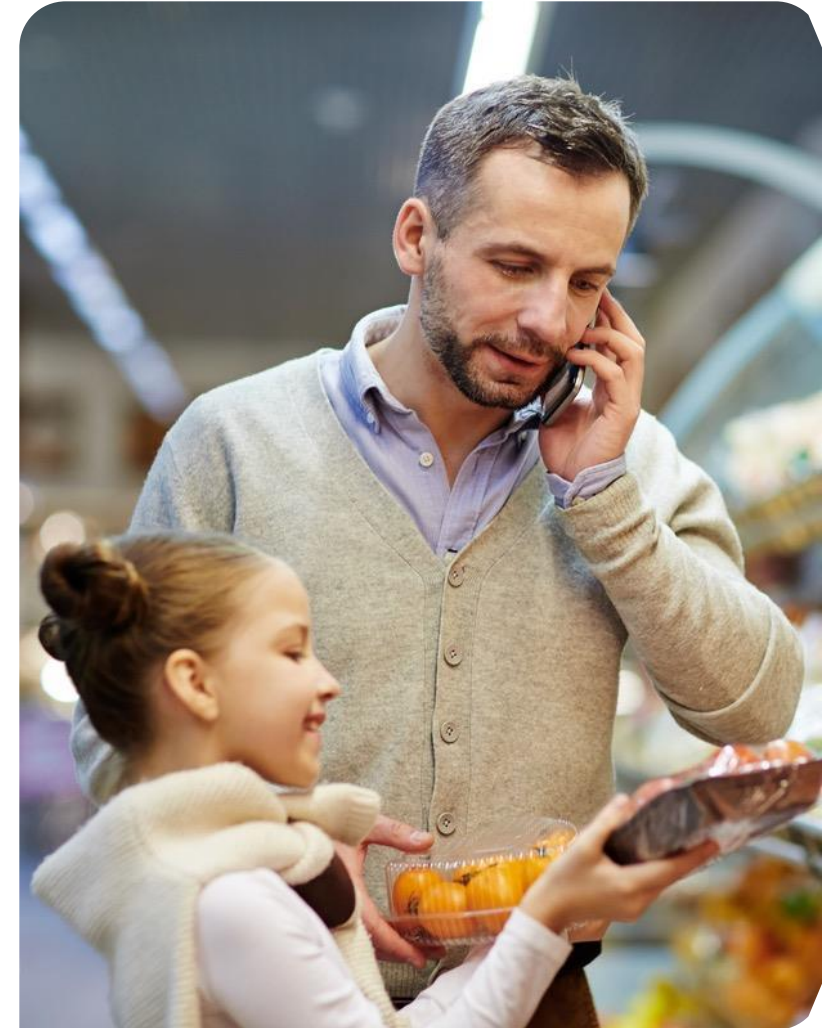
Distinct and Dynamic: The Ultimate Guide to the Québec Consumer

Do you understand the Québec consumer? Doing so is essential for anyone hoping to break into the province with their products and marketing messages.

The importance of Québec and its continued potential are clear. The province accounts for nearly one-quarter of Canada's population. Median after-tax income is higher than the Canadian average. Québec also represents the second heaviest region in terms of spending per capita on packaged goods, behind only the Maritimes and again higher than the Canadian average.

There's nothing average about Québec. You can't succeed here without a tailored approach. This is a province and people with unique traits. Based on data and analysis from NielsenIQ, here are 24 insights to help you better comprehend and penetrate the Québec market.

Source: [Translated from the OQLF website Entreprises \(gouv.qc.ca\)](https://www.entreprises.gouv.qc.ca/)



#1

En français, s'il vous plait!

Make the French connection

You need to speak the language – and that's true in more ways than one.

If you're not communicating in French, you won't make it here. 78% of households speak mainly French at home, and 47% of people speak only French. In Québec, business is conducted primarily in French, which is especially true outside major cities. This linguistic norm is not only a legal requirement but also a vital element of respect and clear communication.

It's not just a matter of labels, although that's essential. While most Québécois have no issue understanding English-only information on packaging, 44% won't purchase the product with such packaging. Speaking the language is more than that. Use the language that this market wants to hear in terms of Québécois slang, Québécois French vs. European French, cultural references in marketing, humour and spokespeople, like people who are part of the Québec celebrity/star system.



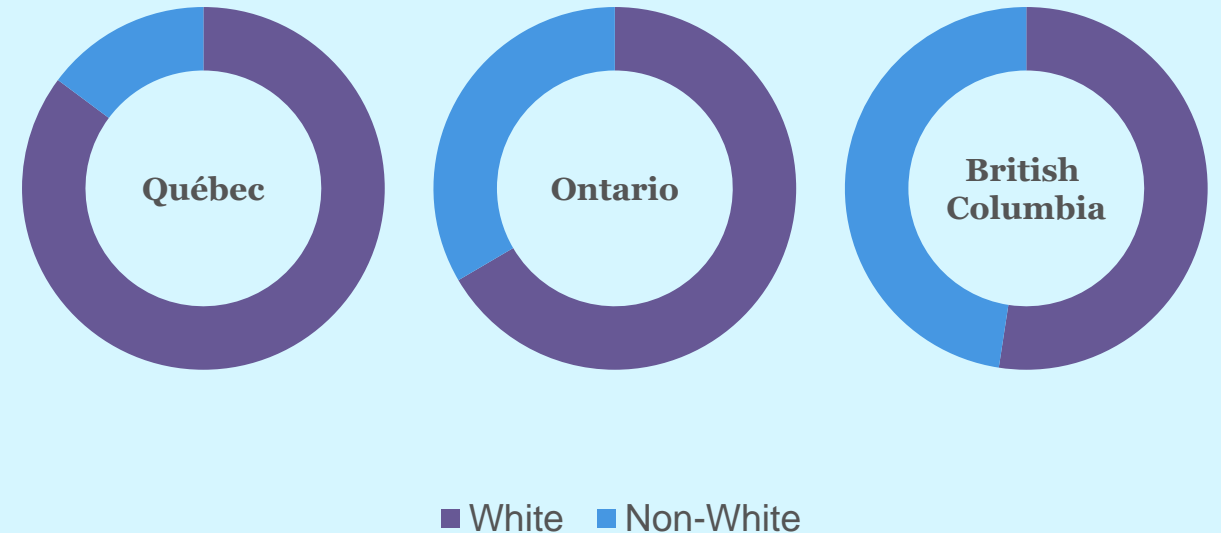
#2

The changing face of multiculturalism

Québec's population is increasing, particularly in Montreal, which is a major hub for immigration. Unlike other provinces, Québec's immigration is influenced by French language regulations, resulting in a distinct demographic profile. For a long time, the population outside Montreal was far less multicultural. Now, we're starting to see changes like more ethnic food aisles in grocery stores across the province. This demographic shift adds a unique tint to Québec's major cities. The influx of immigrants from diverse backgrounds is gradually reshaping the region.

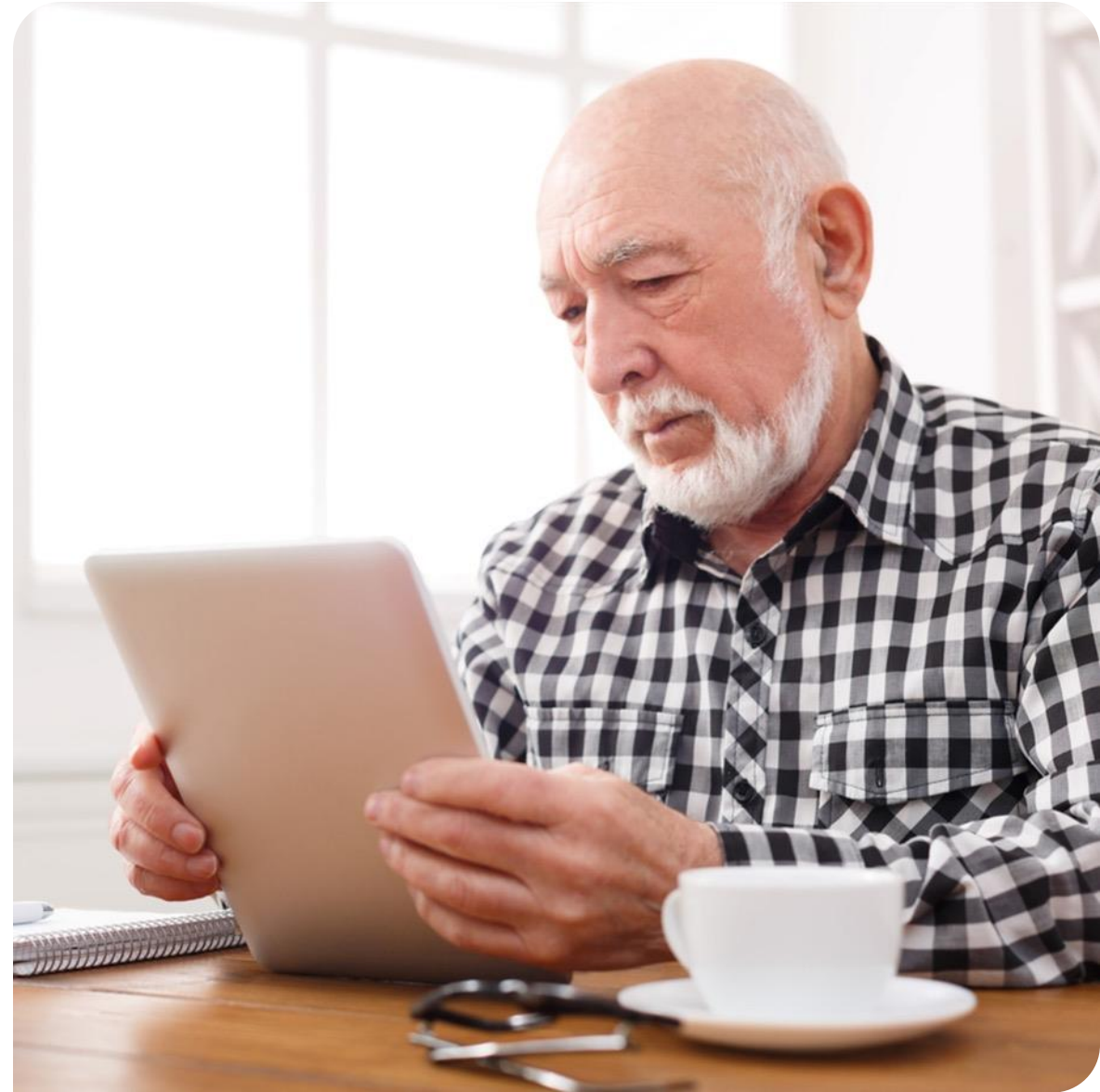
The face of multiculturalism is also different in Québec. In the rest of Canada, the biggest sources of newcomers are southeast, southern, eastern and west central Asia. In Québec, there's a bigger influx from northern Africa (e.g. Algeria and Morocco) and the Caribbean (e.g. Haiti).

Household importance by household ethnicity



One for the ages

Québec's population is aging faster than anywhere else in Canada. Why? After WWII, Québec had one of the highest fertility rates in the industrialized world. Now, the Baby Boomers are reaching retirement age in droves. This is more pronounced in Québec.



Fertility rate is declining but remains higher than national average in Québec

1.49 in Québec vs

1.33 for Canada

Babies are booming...sort of

It's true that the fertility rate in Québec is declining, as it is elsewhere in Canada. Still, the rate remains higher than the national average. Some factors include the Québec parental insurance plan, subsidized childcare service at \$9.10/day per child, and the provincial family allowance (up to \$2,923 for each child). Warehouse clubs, drug stores and dollar stores all over index in Québec for baby care categories.

#5

Montréal

Men's gift sets
 Kosher foods
 Rappini
 Diabetic test meters
 Hair relaxants
 Hair tonics & dressings
 Instant breakfasts
 Wheat germ
 Spinach
 Specialty eastern foods
 Eggplant
 Coconut water
 Kale
 Feminine towelettes
 Single use cameras
 Men hair colour

Québec

Seafood spreads & pastes
 Wheat germ
 Meat pies refrigerated
 Processed loaf
 Salad mixes
 Sushi / specialty Japanese food
 Fondue products
 Random weight bacon
 Turnips
 Oriental fondue & bouillon
 Couscous
 Bok choy
 Okra
 Parsnips
 In store pizza crust/dough
 Leeks

Sherbrooke

Flea collars
 Wheat germ
 Men's gift sets
 Instant breakfasts
 Mineral oil
 Stuffing mixes
 Yams
 Pumpkin
 Cottage cheese
 Nursing pads
 Dry salad dressing
 Pie fillings
 Chard
 Puddings
 Frozen fruit beverages

Saguenay

In store pizza crust/dough
 Random weight bacon
 Random weight natural cheese
 Tomato juice
 Fruit glazes
 Baby seats & accessories
 Lard & shortening
 C&B mushrooms
 Meat pies refrigerated
 Heavy syrups
 Oriental fondue & bouillon
 Mineral oil
 Turnips
 Cigarette papers & tubes
 Bread / roll / pizza mixes
 C&B Gravy

Big differences in the biggest metropolitan areas

The most populous Census Metropolitan Areas (CMAs) in Québec aren't homogenous. It's important to pay attention to the distinctions between Montreal, Quebec City, Sherbrooke and Saguenay. Certain categories perform better in each of these locations, like specialty eastern or kosher foods in Montreal, meat pies and fondue products in Quebec City, instant breakfasts and puddings in Sherbrooke, and pizza crust and fruit glazes in Saguenay.

#6

Rural but not farmers

Do not neglect the spending power outside urban areas

Urban



70% population
(index vs Canada 98)

Small cities / town



11% population
(index vs Canada 83)

+11% \$/buyer
+13% EQ/buyer

compared to urban buyers

Rural



19% population
(index vs Canada 123)

+13% \$/buyer
+21% EQ/buyer

compared to urban buyers

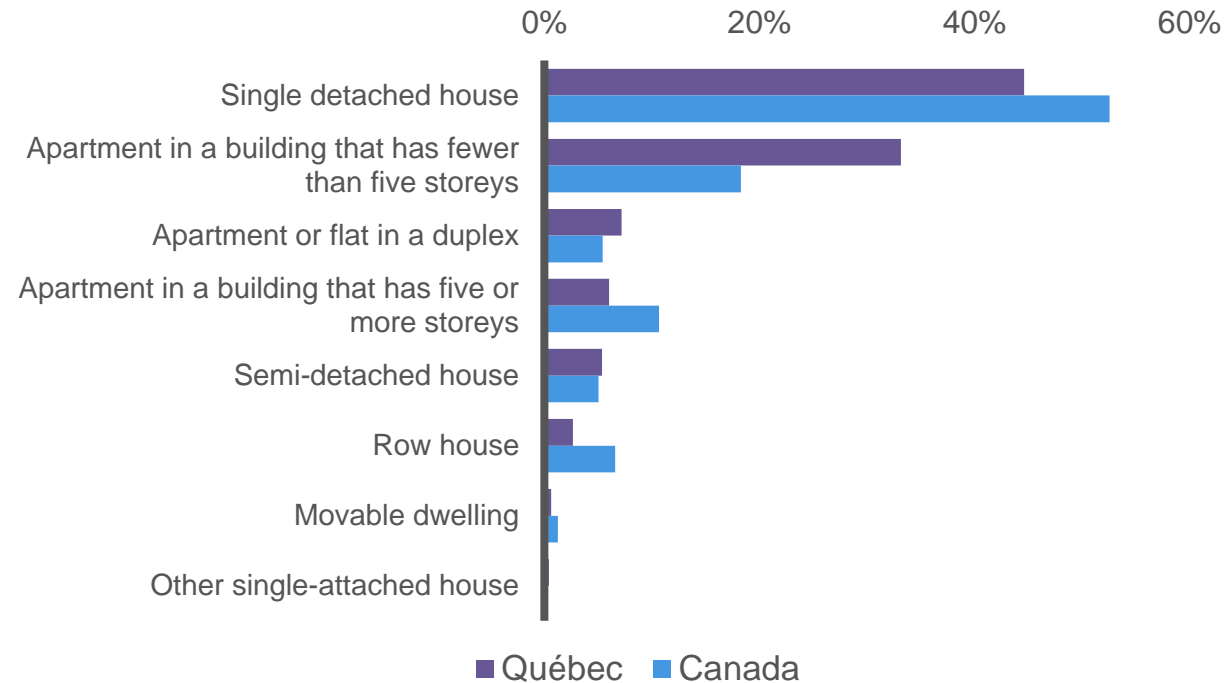
Rural but not farmers

19% of the Québec population lives in rural areas, which is overindexed, i.e. higher than the Canadian average. Another 11% live in small towns and cities. But while Québec represents 22.9% of the Canadian population, it accounts for only 16.4% of farm population. There is significant spending power outside urban areas, with dollars per buyer at 13%

#7

Type of housing – Québec vs Canada

2021



In Québec, households with 3 or more adults spend 1.22x more than province's average (vs 1.15x in ROC)

<https://www150.statcan.gc.ca/t1/tbl1/en/cv.action?pid=9810024001>
[L'historique de l'architecture des appartements à Montréal | Association des Propriétaires du Québec \(APQ\)](#)
 Source: NIQ Omnishopper – National TL Outlet – FMCG – L52wks PE April 20, 2024

Space can be tight

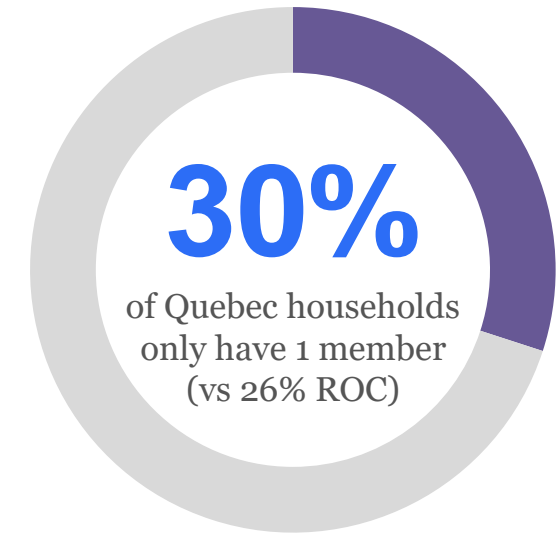
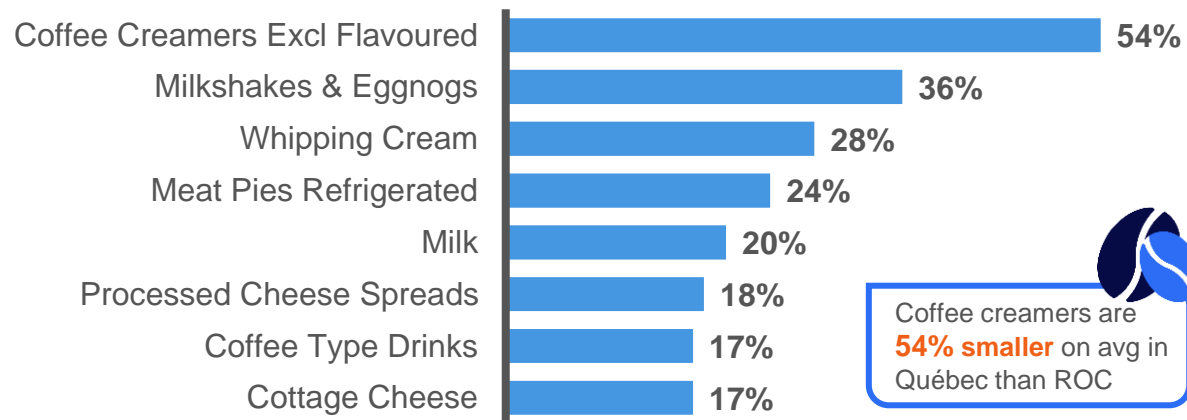
Renting is widespread, with 40% of Québécois renting their homes, contributing to a lower emphasis on single detached homes compared to the rest of Canada. Homeowners too are under pressure, particularly in Montreal, where property values have soared. That means more roommates, more adults living with their parents, and more living in smaller spaces. That influences the needs and choices of Québécois, with less space to stock up.

#8

1 member HHLD	Age 18-24	Age 25-34	Age 35-44	Age 45-54	Age 55+
Buyer dist. Qc	3%	14%	14%	18%	51%
Buyer dist. ROC	5%	17%	17%	14%	47%

Impact: Purchasing smaller pack size in Québec (esp. 75+) of short shelf live items

Tonn per unit Qc ratio vs ROC (Refrig/Dairy)



Living solo and living together

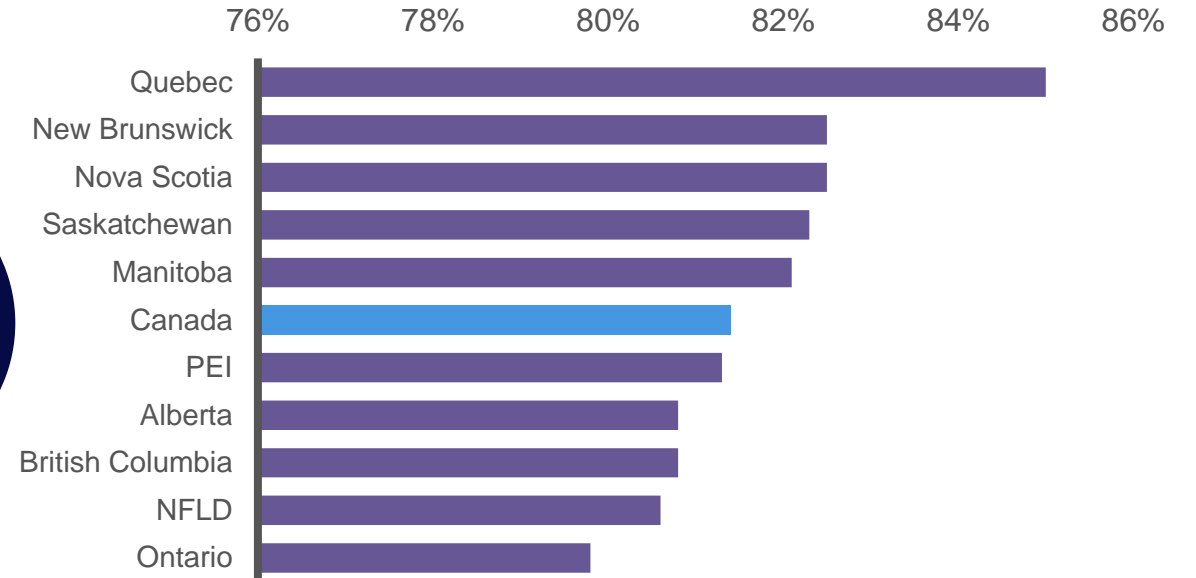
One-member households are common. Compared to the rest of Canada, a higher percentage of Québécois in the 45-54 and 55-plus age groups live alone. For couples, having common law relationships is also the norm. 43% live in common law vs. 23% for the rest of Canada.

#9

More women work in Québec, reflecting on the lifestyle



Employment rate highest among core-aged women in Quebec in February 2024 (in %)



More women are transforming workplaces and their finances

A higher percentage of women work in Québec than anywhere else in Canada, so contribute in larger proportion to the family income. That means more spending power and financial decision-making, and less discretionary time to use it.

[Employment rate highest among core-aged women in Quebec in February 2024 \(statcan.gc.ca\)](https://www150.statcan.gc.ca/n1/pub/75-662-x/2024001/article/00001-eng.htm)

Source: Labour Force Survey (3701), table 14-10-0287-01

#10

Time to save

The household saving rate in Québec is 10.1%, almost double the Canadian average of 5.5%. Tax decreases, faster income growth and lower energy costs are key factors.

10.1%

household saving rate in Québec
(2023)



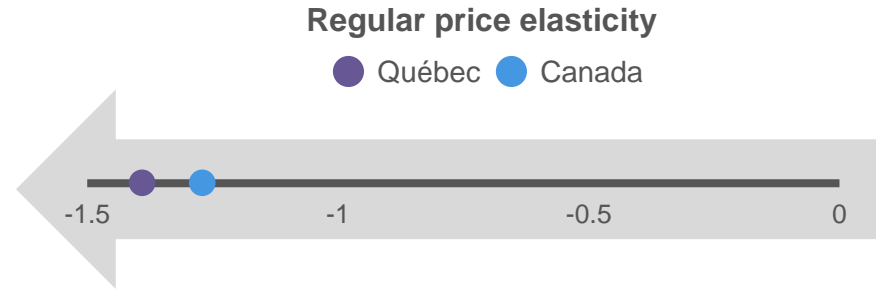
5.5%

household saving rate in Canada
(2023)

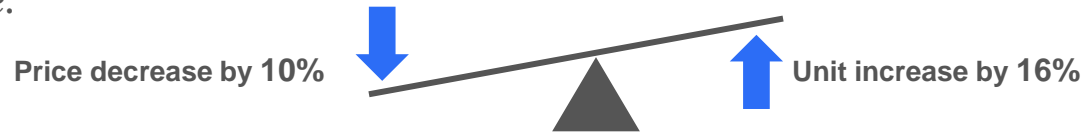


#11

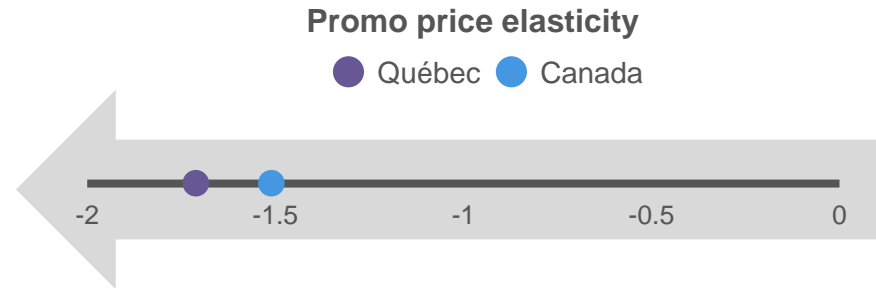
Regular price elasticity is **high** in Québec. Be cautious when increasing price because of volume loss. It may be profitable to decrease price.



Example: Elasticity in Québec: **-1.39**



Promoted price elasticity is **high** in Québec. Be cautious when increasing price because of volume loss. It may be profitable to decrease price.



46.9%
\$ sold on promotion
Québec

44.2%
\$ sold on promotion
Rest of Canada

Ensure the price is right

Sales and promotions are vitally important. Québec consumers are price sensitive and will react quickly to a cost increase. Shoppers seek out early promotions on Thursdays and Fridays. The growth of discounters and private label products is also a result of this trend. With the price elasticity high in Québec, companies should be cautious when increasing price because of the possibility of volume loss. It may be more profitable to decrease price and capture additional volume. A price decrease of 10% could lead to a unit increase of 16%. Promotional strategies that are one-size-fits-all also may not work as well in Québec.

#12

Costs can trump homegrown loyalty

Québécois are proud of homegrown brands, and there's a strong local FMCG industry, but price still matters. Two-thirds of Québécois say they trust Aliments du Québec products. However, 72% are not ready to pay anything above 5% more for local products.



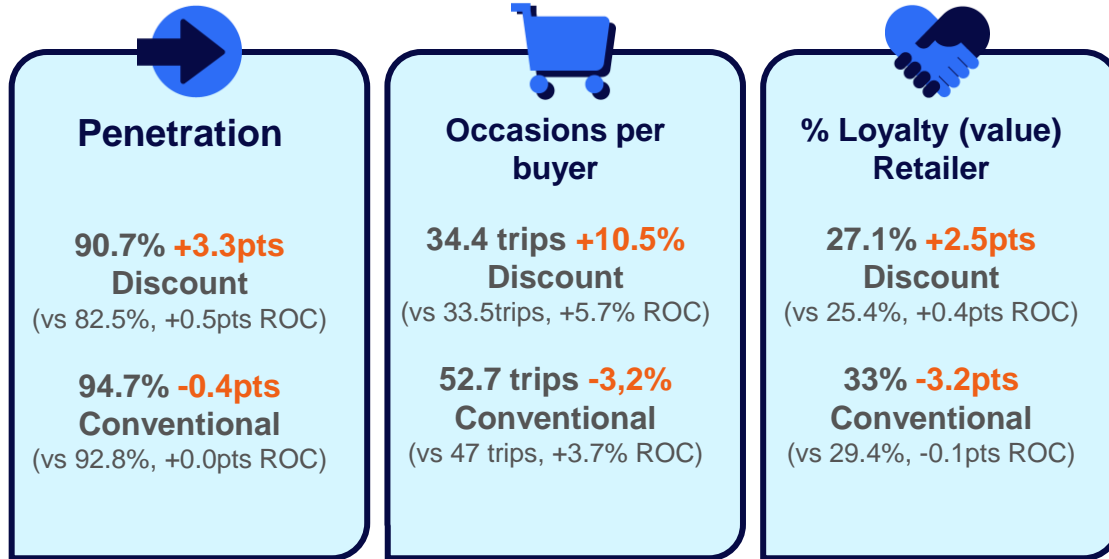
65%

of Quebecers say they trust the 'Aliments du Québec' label when choosing a local product

Source: NielsenIQ, Canadian Label Studies, 2023 (TABLE 182)

Picture: La Terre de chez nous: [Comment soutenir les produits d'ici - La Terre de chez nous](#)

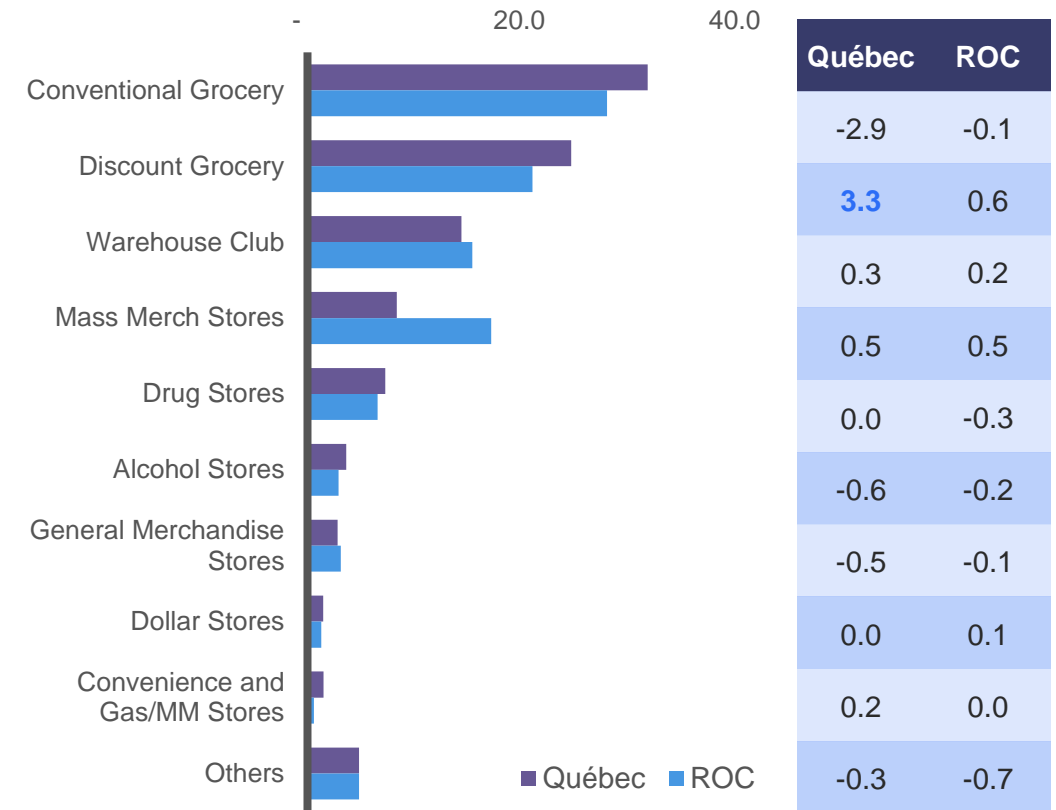
#13



Discounters are gaining the hearts of Québécois

Compared to the rest of Canada, penetration of discounters, occasions per buyer and loyalty are all rising in Québec. Discounters are becoming more accessible to all Québec consumers. So, for some products it makes sense to curate a relevant assortment to counter the rise of discounters and safeguard their shelf space.

\$ share of channel and var. vs YA
Québec versus Rest of Canada



Source: NIQ CPS – National total outlet – Québec vs Rest of Canada – FMCG – 52wks ending August 19, 2024
Source: NIQ CPS – National TL Outlet – FMCG – L52wks PE August 26 2024

#14

Quebecers purchase on average **117 food categories per year**, compared to 112 for the rest of the country.

Lower income families (under 20K) purchase 94 in Qc and 85 in ROC (less restricted)

Filling a more diversified basket

Québécois purchase an average of 117 food categories a year, higher than the Canadian average. Among lower-income families, there's also more variety in the cart than is the case in the rest of Canada.



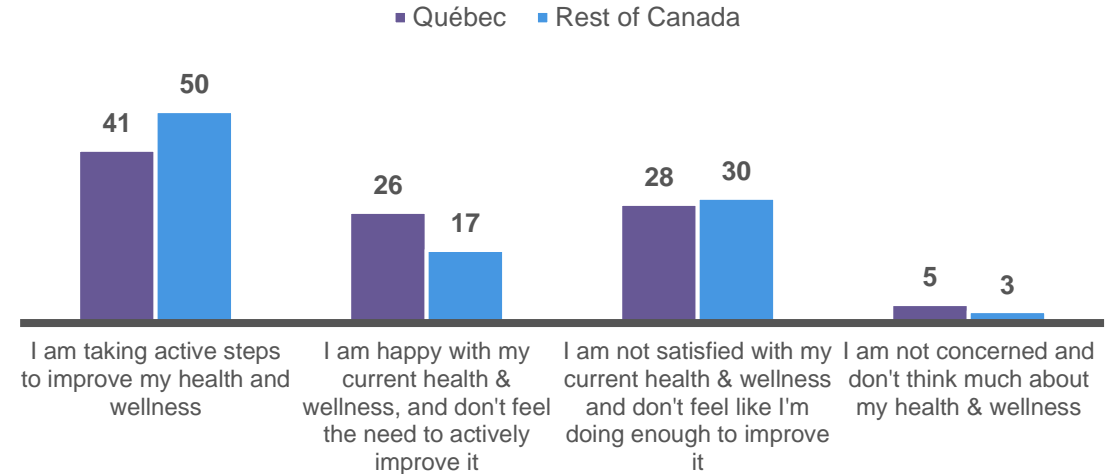
#15

Health and wellness claims may not resonate

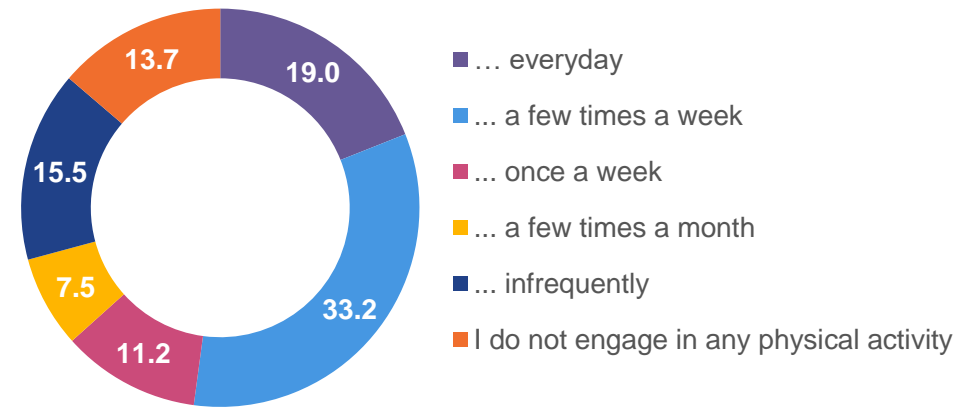
Québécois take pride in their health, but there's a gap between perception and action. While many see themselves as healthy (higher perceived health than the Canadian average), the focus tends to be more on prevention than on making necessary changes.

There's a contradiction here, as Québécois consider themselves to be relatively healthy, but are less likely to engage in physical activity and tend to have a sweet tooth. It can help to frame health and wellness as positive and empowering rather than as a problem. Most Québécois have a strong sense of their well-being, so avoid messages that might imply otherwise. Instead, highlight how your offerings can enhance their already positive lifestyle.

% respondents by overall health and wellness description 2023



I engage in a physical activity... Quebec



Index vs ROC
78
88
107
108
117
190

Source: NIQ Health & Wellness survey – Q. When thinking about your overall health and wellness, which best describes you? Q. You mentioned you are concerned about minimizing potential future health problems. What measures are you currently taking to minimize potential future health problems?
 Source: NIQ Health & Wellness survey – Q. Thinking about your current activity level, please select the statement that best applies to you

#16

% of household reducing intake
of sugar in the past 3 months

33.4%

Québec

41.0%

Rest of Canada

Overdeveloped sugared categories in Québec \$ index

Sweet spreads	176
Baked desserts - frozen	145
Muffin mixes	139
Molasses	138
Pure maple syrups	132
Ice cream cones	124
Cookies	112

Looking for a sugar high

Québécois consume more sugar than the rest of Canada. The province is overindexed in categories including sweet spreads, maple syrup, muffin mixes, snack pudding, ice cream and cookies. Be cautious with messaging and highlight enjoyment, as many Québécois enjoy their sweets and aren't focused on reducing sugar intake.

#17

More shopping trips but smaller purchases

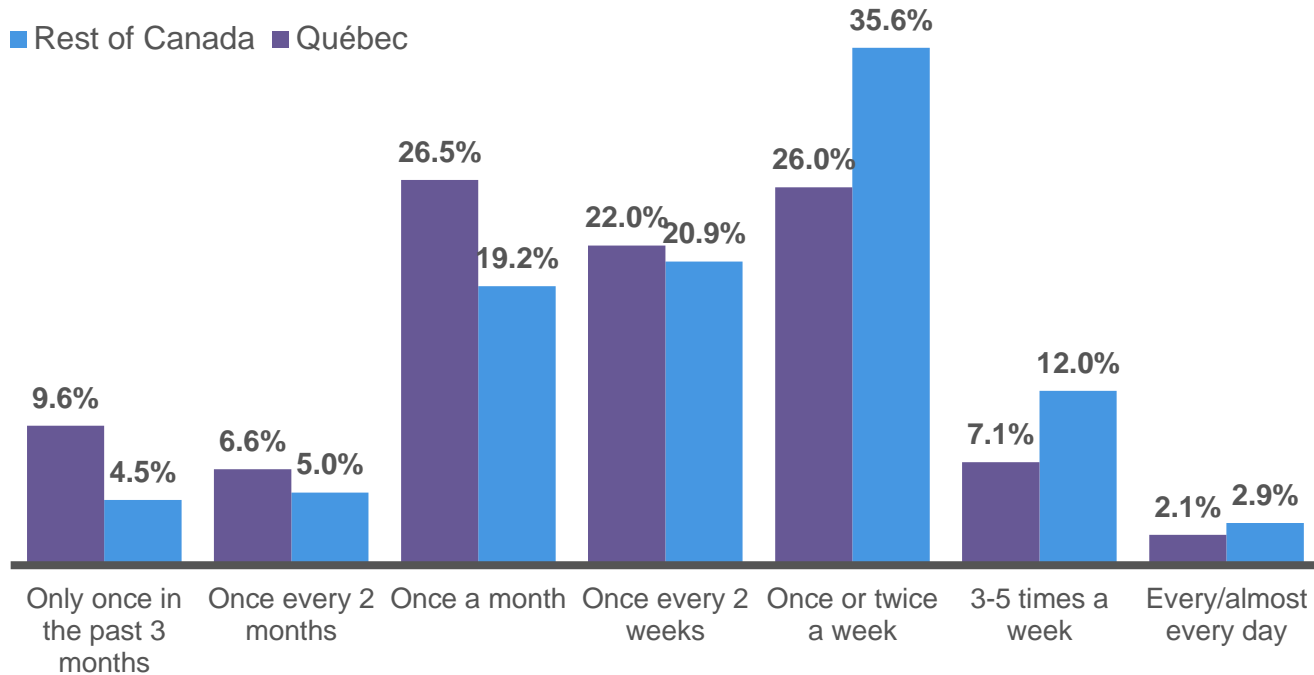
Québécois go out shopping more often than their counterparts in the rest of Canada, with 153 occasions per buyer, but are making slightly smaller purchases.



#18

Frequency eating out in the past 3 months

■ Rest of Canada ■ Québec



35.3%

Quebecers go
eat out weekly
vs 50.5% ROC

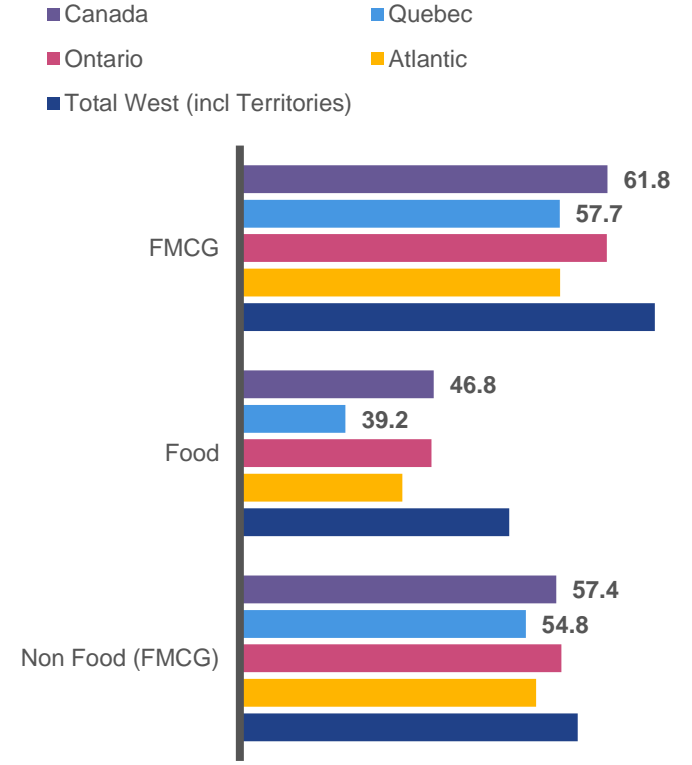
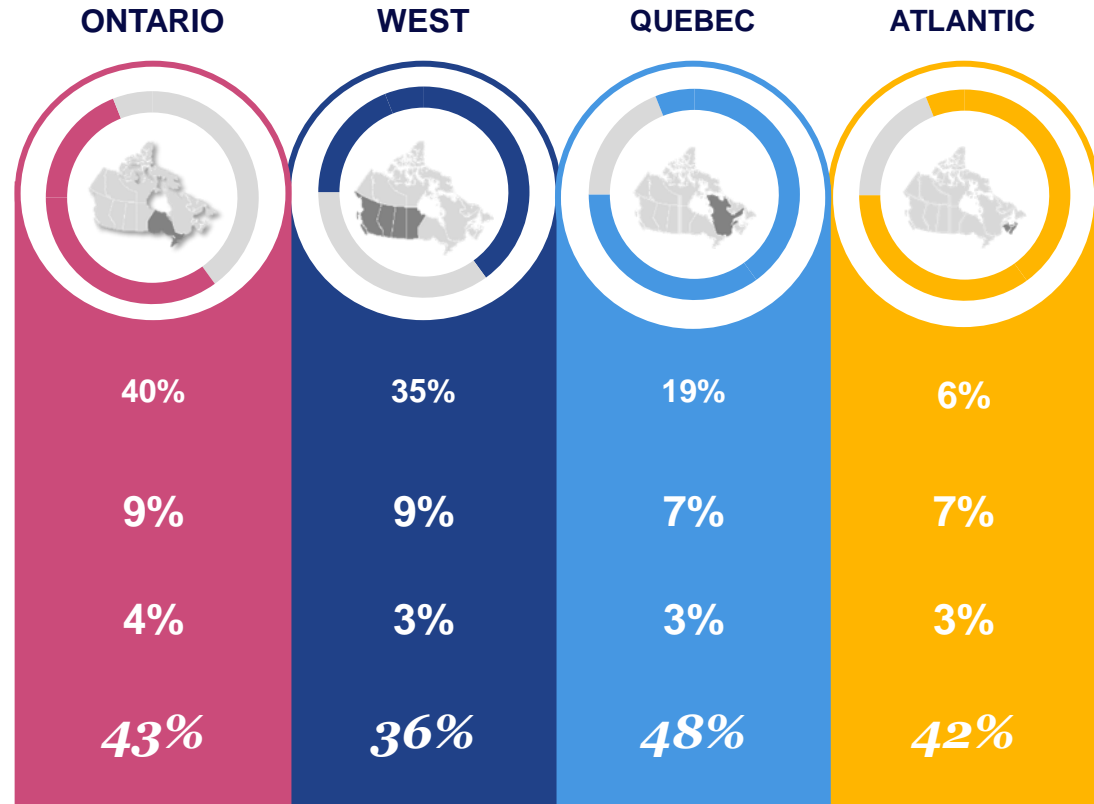
16.8%

Quebecers go
drink out weekly
vs 24.7% ROC

Finding comfort at home and abroad

Québecers embrace joie de vivre, but not as often as you might think. 35% of Québécois eat out weekly vs. 50% for the rest of Canada. They opt for more nights in, and when they do go out, they favour romantic dinners (33% vs. 23% for the rest of Canada). That can present opportunities for convenient home meal replacements; Québec already has a higher dollar share of refrigerated and deli entrees compared to the rest of Canada.

#19



Online shopping lags

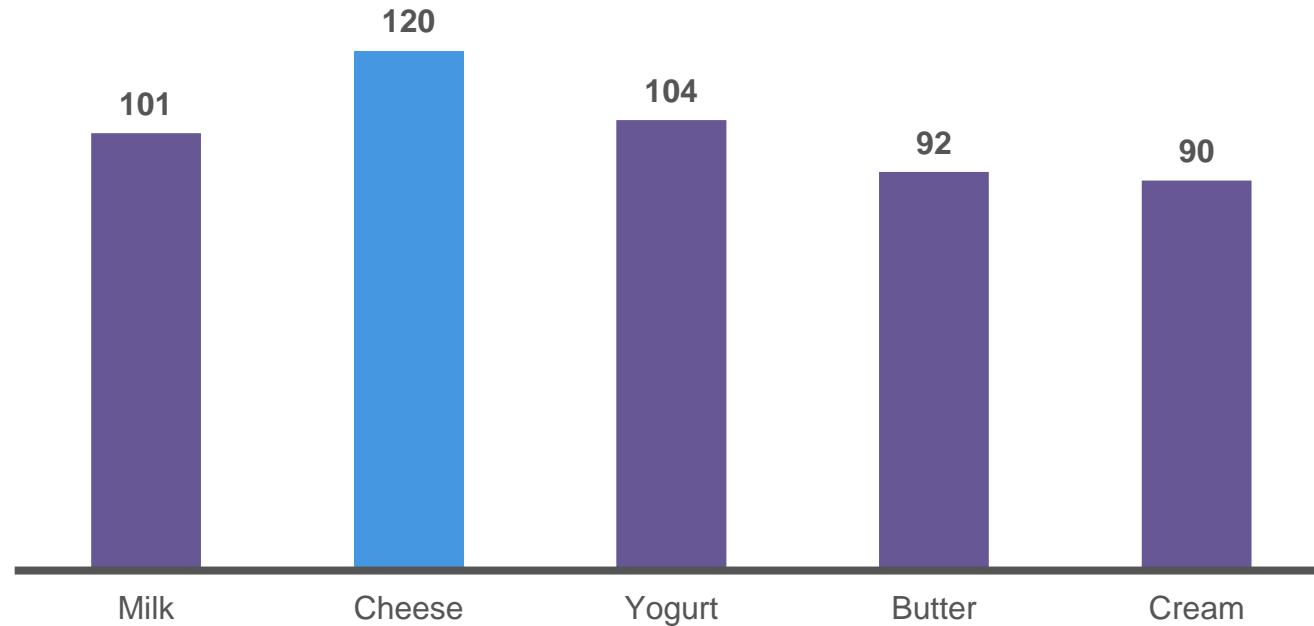
Québec lags behind the rest of Canada in online penetration for FMCG in general, and for both non-food and – especially – food items. Yet Québécois are overindexed compared to the rest of Canada when it comes to Amazon’s dollar share of total FMCG online sales.

Source: NielsenIQ Omnishopper | National | Online| FMCG | L52wks WE December 30, 2023

#20

Dairy product index in Quebec

L52 weeks ending 10 August 2024



1st in terms of production - **50%** of Canadian cheese is from Québec.
1st in terms of consumption - Quebecer eat **8.5kg** of cheese each year.
 That's **1.5kg** more than the rest of Canada.

Say cheese

Historically, Québec has always been the most important province for cheese, both in terms of production (50% of Canadian cheese is from Québec) and consumption (Québécois eat 8.5 kg of cheese per year, 1.5 kg more than in the rest of Canada).



#21

A matter of tastes

Québec also overindexes in a number of food categories, with higher-than-average tastes for maple syrup, beef, pork, veal, peanut butter, olives and refrigerated meat pies.

Ethnic foods

Couscous
Dates
Olives
Anise



Chinese food
Mexican salsa and seasoning
Eastern food

Beauty

Nail products
Nail cosmetics
Artificial nails & accessories



Mens hair colour
Hair tonics & dressings
Face cosmetics

Proteins

Beef
Pork
Veal
Frozen and fresh seafood
Ham



Chicken
C&B salmon
Frozen fish and chips
Turkey
Lamb

Hygiene and household cleaning

Aromatherapy
Cat litter deodorizers
Household bleaches
Bar soap



Fabric refreshers
Vinyl & leather cleaners
Laundry accessories
Liquid soap
Drain cleaners
Furniture polish & oil

Breakfast

Pure maple syrup
Baked breakfast in store
Juices & drinks refrigerated
Sweet spread
Peanut butter



Tea
Hot chocolate
Hot cereals
Milk C&B
Honey

Meals

Dry pasta
Oriental fondue & bouillon
Fondue products
Meat pies refrigerated
Pasta refrigerated

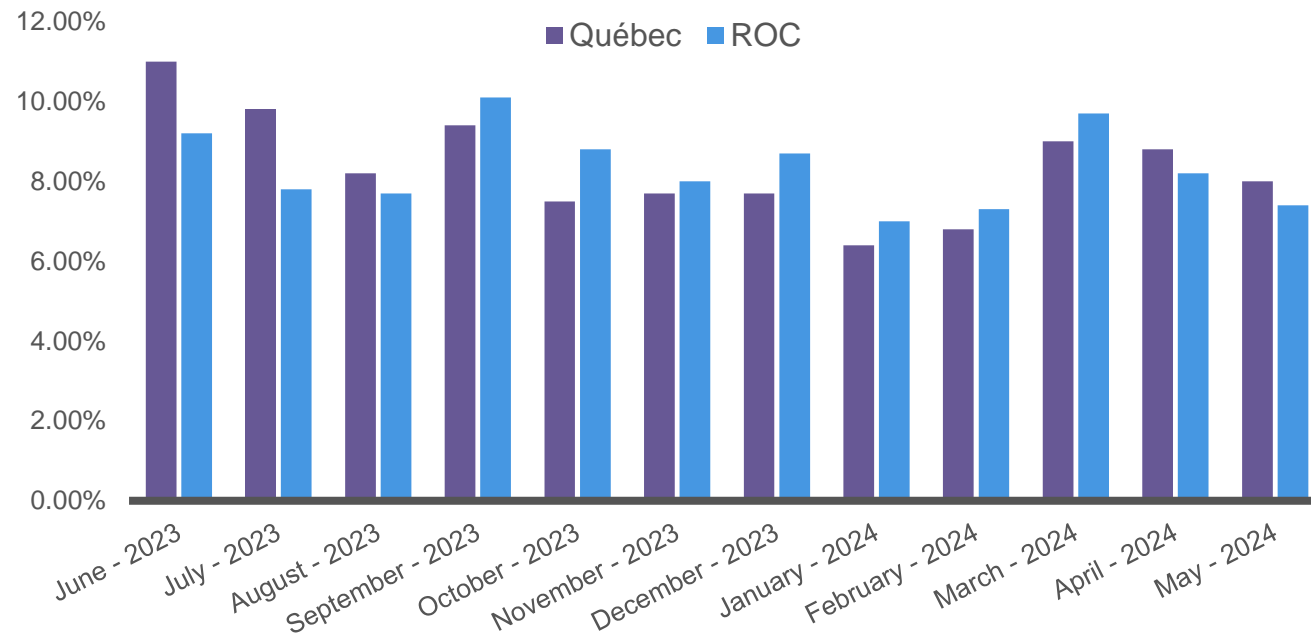


Regular rice
Chili con carne
Pasta – c&B
Frozen meat patties
Refrig/deli pizza

#22

\$ monthly importance of household cleaning accessories

Quebec TL Outlet – 52wks ending May 18, 2024



June and July are **1.2x more** important in Québec than ROC for hhld cleaning accessories

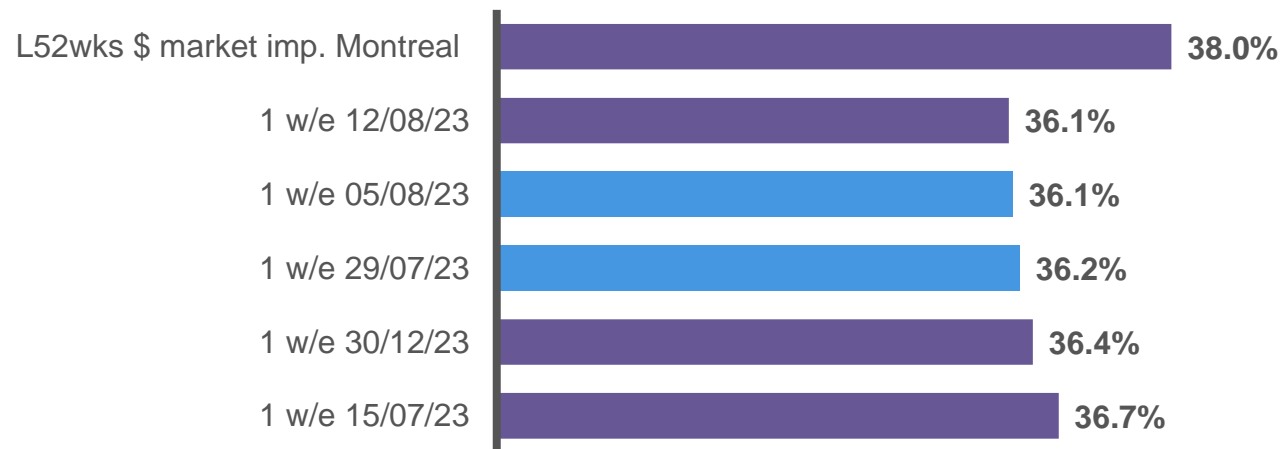
Pay attention to the holiday calendar

There are plenty of opportunities around Saint-Jean-Baptiste Day, known as *Fête nationale du Québec*, which is celebrated June 24. Don't fly the marketing flag in conjunction with Canada Day one week later. In Québec, July 1 may be more associated with moving day. That's the date when leases of rental properties were traditionally up. Now, it's a day when moving companies work around the clock. Some locales even schedule extra garbage and recycling pickup to handle the boxes and unwanted furniture left at the roadside.

#23

Quebecers exit Montreal during summer and year-end holidays

Montreal Census \$ weekly market importance, Food (bottom 5 weeks)
Quebec All channels– 52wks ending June 1st, 2024



Did you know?

Construction vacations (**July 23 – August 5th, 2023**) is the busiest time of year for tourism in Québec. Nearly 1/4 Quebecers is on vacation during that time.

Summer exodus

When planning promotions and inventory, consider the summer exodus from Montreal. Construction vacations in late July and early August make for the busiest time of year for tourism in Québec. Nearly one-quarter of Québécois are on vacation during that time. They're often looking for convenient, quick, and easy options for their busy summer schedules. Overall, vacations are a key to life balance, at home and abroad, with a continued appetite among Québécois for exploring new destinations.

#24

Party time

Québécois like to party together. The province has more than 1,000 festivals, more than anywhere else in Canada, and 59% of attendance is local. Half of these festivals have emerged since 2000.

More than

1000

festivals in Quebec
more than any other province
in Canada.

59%

of festival attendance
is local

51%

of the Quebec festivals
launched after 2000 and
20% after 2010



Know the *I.M.P.A.C.T.* of Québec for your business

The demographics of Québec, characteristics and outlook of the population, living situations and trends in consumer preferences all have implications for product strategies. NielsenIQ can help you to unearth and unlock the opportunities.

Importance of Québec

With the impact of discounters affecting spending, there's a prime opportunity to boost consumer expenditure in Québec. Strategically position your offerings to reverse the trend and attract more spending from Quebecers.

Address city centers differently with relevant assortment and communication strategy.

Tailor your strategy and offer to newcomers, especially in the Montreal area.

Money (finances)

Consider smaller, convenient packages to ease transportation and needs of smaller households.

Appeal to women who contribute in larger proportion to family income.

Tailor your approach to renters by acknowledging their unique financial constraints, which differ from those of homeowners.

Address their specific needs with solutions that fit their budget and living situation.

Perception and mindset

Frame health and wellness as positive and empowering rather than as a problem. Most Quebecers have a strong sense of their well-being, so avoid messages that might imply otherwise, which could lead them to think, "I don't need this." Instead, highlight how your offerings can enhance their already positive lifestyle.

Be cautious with messaging about sugar, as many Québécois enjoy their sweets and aren't focused on reducing sugar intake. Tailor your approach to acknowledge their preferences and highlight the enjoyment and quality of your products.

Propose convenient options for in-home dining as they infrequently go out.

Attitude and shopping patterns

Develop a strategic pricing approach to attract price-conscious Quebecers and minimize the shift toward private labels.

Curate a relevant product assortment to counter the rise of discounters and safeguard your shelf space.

Embrace an online strategy especially with non-food categories.

Cultural differences

Nail your communications in (Canadian) French.

Align with important dates such as June 24th, Moving Day, and the two-week construction holiday to connect with local events.

Make summer enjoyable for Quebecers by providing convenient, quick, and easy options for their busy event schedules. Quebecers traveling to other regions may have to do their grocery shopping in a new environment. Help them find your products easily with convenient displays.

Leverage the popularity of cheese by incorporating it into your product offerings. Consider how cheese can enhance or complement your products and explore ways to integrate it into various consumption scenarios.

Trends to watch for

Tag aliments du Québec
Offer attributes without the premium price
Understand the ups and downs of weather.

Coming *into view*

Thank you

NielsenIQ

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NielsenIQ (NIQ) is the world's leading consumer intelligence company, delivering the most complete understanding of consumer buying behavior and revealing new pathways to growth. NIQ combined with GfK in 2023, bringing together the two industry leaders with unparalleled global reach. Today NIQ has operations in more than 95 countries covering 97% of GDP. With a holistic retail read and the most comprehensive consumer insights—delivered with advanced analytics through state-of-the-art platforms—NIQ delivers the Full View™.