

SELLING Québec
TO THE WORLD

Tourism Development Policy

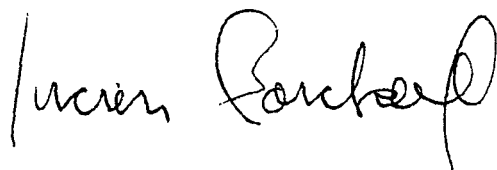
Prime Minister's Message

It gives me great pleasure to underline the launching of our new tourism development policy, *Selling Québec to the World*. For many, tourism means holidays and escape. For my government, the tourism industry also represents a dynamic economic sector.

The World Tourism Organization forecasts that international tourist arrivals will top one billion by the year 2010, making tourism the world's leading industry. This outlook is particularly good news for Québec, as it will enable the creation of thousands of new jobs, especially for our youth.

The contrast of its changing seasons, big-city excitement combined with the serene beauty of breathtaking landscapes, and the legendary hospitality of its inhabitants make Québec particularly well-placed to gain from the predicted growth in tourism. Aside from the incredible economic potential it offers, tourism gives Québec a unique opportunity to showcase its culture and know-how to the rest of the world.

This tourism development policy will enable the government and industry to better coordinate their efforts and strengthen partnerships in order to position Québec as one of the top international tourist destinations.



Lucien Bouchard

Foreword

SELLING QUÉBEC TO THE WORLD

Tourism means discovery.

Six hundred million men and women around the world currently travel outside their own countries, and this number is expected to top one billion early in the next century. Québec must develop its many assets if it wants to cash in on what is destined to be the world's largest economic sector in the year 2000.

Anyone who has driven Québec's roads, visited its cities and towns, strolled through its forests, hiked its trails, ridden its bicycle paths, navigated its rivers and myriad lakes, or flown over its huge territory has no doubt marvelled at nature's bounty and the magnificent scenery, changing seasons and abundant plant and wildlife. And anyone who has visited Québec has been touched by the warmth of its inhabitants and charmed by its culture, the very essence of what makes Quebecers proud and confident in their future.

This tourism development policy is the culmination of broad consultation and productive exchanges with the industry. It defines the directions and actions that will enable Québec to consolidate its position on existing markets, capture new markets, develop customer loyalty and become one of the world's most visited destinations.

In implementing this policy, it must be borne in mind that tourism is more than a vital economic activity; it is first and foremost an activity engaged in by people seeking a vacation experience. Tourists are above all demanding customers who want to be satisfied, which is why this policy is customer-driven. If we are to offer rewarding tourism experiences, we must identify new trends and deliver quality products and services.

If it is to strengthen its position as a global travel destination, Québec will also need to develop an image that accurately reflects what it is and what it has to offer the world. Our product is Québec and Quebecers. Consequently, we must project a strong, friendly image that draws on our attractions and our geographical, social and cultural resources. That image must combine the verve and modern lifestyle of French culture in America with the Old World charm of a Québec culture that is alive and well and unique in the world.

A satisfied customer is someone who is sold on Québec and will become our best ambassador. This tourism development policy therefore calls on all Quebecers to join forces to sell Québec to the world.



David Cliche
Minister for Tourism

Table of Contents

INTRODUCTION	7
ISSUES	9
STRATEGIC DIRECTIONS, COURSES OF ACTION AND MEASURES	15
CONCLUSION	30
APPENDICES	31

Introduction

In the 20 years since the first summit on tourism was held in 1978, Québec has made major strides as a tourist destination. In 1996, tourism represented:

- revenues of \$5.4 billion;
- an industry comprising 29 000 businesses employing over 100 000 people. Tourism jobs are concentrated in the hotel, restaurant, transportation, travel agency, and recreation and entertainment sectors;
- Québec's sixth largest export, after aeronautics, with international exports (outside Canada) worth \$1.9 billion;
- total investments of \$1.3 billion;
- annual tax receipts of \$1.2 billion for the provincial and federal governments;
- youth employment: 28% of tourism workers are under 25;
- low-cost job creation: it takes \$57 000 in travel receipts to generate one job in the tourism industry.

In the past few years, tourism has become the leading industry worldwide. This, coupled with the importance of the industry to the Québec economy, explains why the government has made tourism a development priority.

Québec's tourism industry is supported by:

- a government leader, Tourisme Québec, which orients government action in matters of tourism, promotes public-private partnerships and supports development of the Québec tourism industry as a whole, notably through a network of solicitation agents in selected markets (Canada, United States, France, United Kingdom, Germany, Japan). As a government agency, Tourisme Québec is independent administratively speaking, which enables it to adopt a dynamic management style modelled on the private sector;
- 19 regional tourist associations mandated to bring together regional partners in tourism, foster cooperation and oversee regional tourism development and promotion;
- several sector-based associations representing the main businesses and organizations according to similarities and sector of activity (lodging, festivals, attractions, etc.).

In fall 1996, the Québec government held a summit on the economy and employment which brought together Québec's major social and economic leaders with a view to working together to define strategies for ensuring sustainable economic development and creating quality jobs. Fully aware that the tourism industry can play a vital role in Québec's economic development, the Québec government decided to make tourism an area of priority intervention and, in March 1997, organized a forum which brought together over 200 participants representing the different sectors, products and regions. The forum on tourism gave rise to a number of observations, consensuses, and courses of action.

This policy integrates the results of that forum, the work of UQAM's Tourism Chair during the forum, Tourisme Québec's consultations with the responsible government departments and organizations and its consultations with the tourism industry in August 1997. It contains the main directions and courses of action jointly defined by the government and industry to ensure that tourism businesses flourish and that the industry contributes as fully as possible to the economic, social and cultural development of Québec in the new millennium.

In recent years, Tourisme Québec and the Québec tourism industry have implemented a number of strategies aimed at delivering industry growth. These strategies mainly involve:

- developing supply/marketing efforts around eight priority products;
- defining Québec's target tourism markets.

Since taking up office in fall 1994, the current government has also taken numerous steps to demonstrate its commitment to tourism. Among other things, it:

- renewed the agreement with regional tourist associations. The new three-year agreement streamlines the administrative provisions of the previous memorandum of understanding;
- adopted special measures to support tourism activities in the Saguenay—Lac-Saint-Jean region in the wake of the summer 1996 floods;
- began implementing a destination management system (electronic marketplace);
- created the Tourism Partnership Fund;
- built the Tourisme Québec Web site;
- supported Québec travel agencies interested in selling more Québec tourism products by establishing a network of Québec vacation destinations in collaboration with the association of travel agents ACTA-Québec;
- made tourism a priority of economic cooperation between France and Québec by signing the first-ever cooperation agreement on tourism;
- delegated responsibility for tourist signing to the Société québécoise de promotion touristique;
- made Tourisme Québec an agency, thereby granting it considerable administrative and financial autonomy;
- adopted special fiscal measures under the 1997-1998 budget to support tourism development.

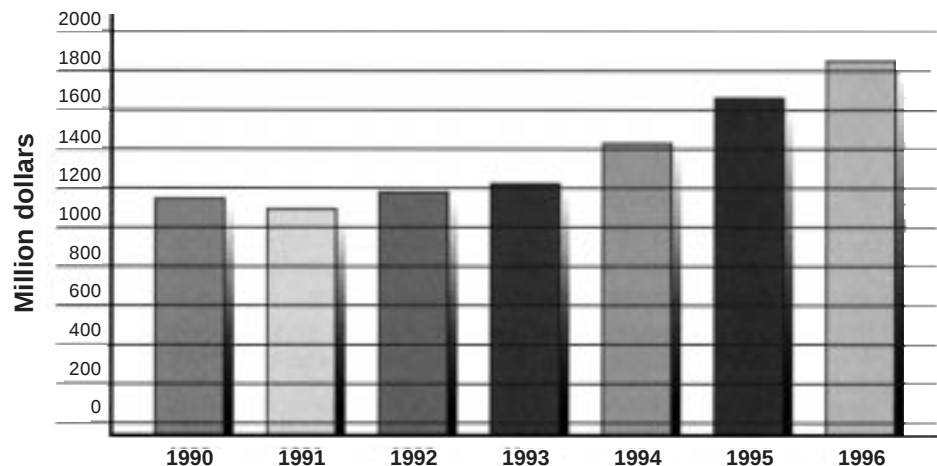
While the above strategies and action have produced results, the environment changes rapidly, particularly in terms of customers, technology and competition. Customers change their travel habits for technological as well as sociological reasons, while market globalization leads to stronger competition and faster change so that tourist destinations must regularly rethink their strategies. The directions and courses of action contained in this policy flow from an analysis of this constantly evolving environment.

DESTINATION QUÉBEC: STRENGTHS TO BE CONSOLIDATED

- *Global tourism is an industry of the future.* Tourism has become the world's leading industry over the last decade. It is also one of the fastest growing industries, particularly in terms of cross-border trips. The World Tourism Organization predicts that international tourism will grow from 592 million arrivals in 1996 to 700 million in the year 2000 and top one billion by the year 2010. Geographically, Québec is positioned particularly well to gain from this growth. **Indeed, since 1980, North America's share of the international tourism market has shown the strongest growth, along with the Asia/Pacific region.**

- *International tourism is a dynamic sector in Québec.* The growth in the Québec tourism industry over the past few years is primarily attributable to foreign markets. Receipts from international travel rose 50% between 1993 and 1996, mainly due to the exceptional upward trend in tourists from France since 1990. This performance helped bring Québec's tourism deficit down from \$1.2 billion in 1993 to \$458 million in 1996, a 62% reduction. Québec has proven its worth as an international tourist destination despite its small size on a world scale. Montréal, the gateway city for global travel to Québec, ranks at the top of the list. Not only is it the seat of the International Civil Aviation Organization (ICAO) and International Air Transport Association (IATA) head offices, but Montréal is also the third most popular city in North America, after New York and Washington, for international conventions. Québec City, a UNESCO World Heritage Site, affirms the global character of Québec's tourism supply. Québec's foreign reach is not limited to its main cities, however. In fact, several regions have started taking a piece of the pie. **As a result, tourism is now Québec's sixth largest international export. But as with most industrialized nations, future growth of the Québec tourism industry is largely dependent on foreign markets.**

QUÉBEC'S INTERNATIONAL TOURISM RECEIPTS



- *Quebeckers are travelling less to the United States.* The substantial decline in the number of Quebeckers holidaying south of the border since 1993 is attributable to the poor exchange rate, marketing strategies aimed at encouraging Quebeckers to travel within their own province and the revitalization of the domestic tourism supply. The Québec tourism industry must use this opportunity to recover and develop loyalty within this customer segment.
- *The tourism supply is increasingly international in scope.* The opening of the casino and the increase in summer events has helped Montréal reinforce its role as Québec's tourist mecca. Québec City, with its new convention centre, the Montmorency falls and the revitalization of its summer and winter events, has reaffirmed its position as the capital. Numerous activities targeting international tourists have been developed in other regions as well. For example, a major injection of capital has helped make Mont-Tremblant a new tourism pole for travellers to Québec.
- *The Québec tourism industry has its own special financing sources.* Revenues from the Québec tax on lodging are earmarked specifically for funding regional tourism. Each region is free to collect the tax or not. Few industries in Québec enjoy the same opportunity for development.

- *Tourism is henceforth treated as a driving factor of regional development.* An increasing number of non-traditional partners are willing to invest in tourism, the cornerstone of several regional economic development strategies. The economic network underpinning the tourism industry is continually expanding. The Fonds de solidarité des travailleurs du Québec's willingness to invest in tourism and the Confederation of National Trade Union's book of recommendations on Québec tourism testify to our social and economic leaders' belief in the industry. Several government partners as well have shown a keen interest in the sector, eagerly participating in the work of the forum on tourism.
- *The tourism industry is better prepared to face worldwide competition.* Several facts bear out the professionalization of Québec's tourism industry, including the increase in tour packages, improved networking through the development of chains, more structured worker training through the Conseil québécois des ressources humaines en tourisme, creation of a travel distribution system (inbound operators) and an ever-growing number of business partnerships between Tourisme Québec and the industry.
- *Tourism contributes to a number of social and economic goals.*
 - **Developing Montréal**
The expansion of foreign markets impacts directly on the economy of Montréal, the gateway to foreign travel to Québec.
 - **Affirming Québec City as a capital**
The increase in international tourists furthers the establishment of world-class amenities in Québec's capital (e.g. convention centre).
 - **Developing Québec's regions**
Most regional strategic plans identify tourism as a development priority.
 - **Promoting investment**
Tourism brings potential investors to Québec in the form of business travellers and convention delegates.
 - **Ensuring Quebecers' quality of life**
Tourism fosters the development of Québec's natural and cultural heritage and helps ensure a return on investments in public amenities in sparsely populated regions.
 - **Integrating cultural communities**
By getting cultural communities to discover their new homeland, tourism helps reinforce their sense of belonging to Québec.
- *Tourism is vital to Québec's international profile.* By showing three million foreign travellers a year that Québec is a friendly, open and tolerant society, tourism does more to reinforce Québec's image as a modern, dynamic and culturally distinct society than any other activity. It further contributes to Québec's international profile through foreign advertising campaigns and press relations efforts aimed at getting foreign journalists to write about Québec. At a cost of \$1 million a year, these activities result in media coverage that gives a positive image of Québec and generates \$90 million in spinoffs. Tourism contributes to all economic exchanges between Québec and the rest of the world.

WEAKNESSES AND CONSTRAINTS: CHALLENGES FACING THE TOURISM INDUSTRY

- *The Québec tourism industry needs to be more customer-driven.* Although it welcomes more than 20 million visitors a year, Québec lacks an integrated system enabling it to identify travellers' expectations, spending patterns and degree of satisfaction with their stay (products, hospitality services, quality of services). This knowledge gap becomes more problematic as the customer profile changes (greater segmentation, aging population, breaking up of holidays, etc.). In addition, Québec has to compete with other destinations that leave travellers with a wealth of holiday choices. The lack of quality standards coupled with an almost unilingual French-speaking population outside its major cities is already affecting Québec's ability to compete.
- *Québec lacks a sufficient critical mass of world-class attractions.* There is an insufficient variety and concentration of products. Tourist attractions are often scattered throughout the territory, and certain tourism infrastructures, such as the Montréal Convention Centre, are finding it harder and harder to compete.
- *The potential of the U.S. market is not being fully tapped.* Despite the strong growth in receipts, U.S. visitation to Québec is barely higher than it was in 1993. Québec is just maintaining its position on adjacent U.S. submarkets and has not yet been able to attract Americans living in the Sunbelt, despite the fact that Québec's heftiest spending on tourism promotion is in the U.S. marketplace. The United States is the world's largest outbound market, and that market is located at Québec's doorstep.
- *Overseas markets are relatively homogeneous.* Québec's main overseas market is France, although there has been noteworthy growth in visitors from the United Kingdom, Germany and Japan since 1994. Nonetheless, the fact that Québec has failed to really capture any overseas markets other than France makes it vulnerable. The lack of adequate air services between many of these markets and Québec is a serious stumbling block to diversification. The recent deregulation of the airline industry in North America and the transfer of international flights from Mirabel to Dorval should help turn the situation around by creating worthwhile opportunities for exploiting distant U.S. and certain overseas markets.
- *Québec is behind in using new technologies for tourism marketing and promotion.* Tourism is a perfect sector for the commercial application of new information technologies. In the coming years, IT will play a critical role in tourism promotion/marketing by giving consumers even more direct access to tour operators. With this change, the future role of travel agents is uncertain. The question is whether or not the Québec legislation governing travel sales is adequate to deal with this new reality. One thing is certain, however: Québec trails other Canadian destinations in terms of IT use.
- *Tourism is too concentrated in summer.* While the increase in international arrivals has enabled gains in winter and, especially, fall tourism, summer remains Québec's biggest tourist season. This situation affects the profitability and stability of businesses—especially in regions which get few business travellers—and, to a certain extent, contributes to job insecurity. It impedes the development of international-calibre Québec tourism businesses as well as the creation of quality, stable tourism employment.
- *Québec's image is too broad and lacks character.* The positioning of Québec tourism products does not set them apart from similar offerings in other tourist destinations. Yet Québec is known for its distinct culture within North America, as well as its ability to offer bona fide vacation experiences (e.g. summer tourist events, major winter expeditions). These aspects are not emphasized enough in Québec's current positioning.

- *The tourism supply does not sufficiently exploit Québec's ecotourism potential.* Despite Québec's rich and varied natural capital, related tourist resources have not been inadequately developed, particularly public attractions (provincial parks system, wildlife sanctuaries, Crown land) and the countless lakes and rivers which make Québec the largest source of fresh water and site of the largest network of waterways in the world. Québec's cultural distinctness within North America is not being exploited enough. Visual pollution, the vulgarization and degradation of landscapes and the overexploitation of certain tourist sites threaten the sustainability of Québec's natural and cultural heritage while ecotourism is enjoying increasing popularity among international travellers.
- *Tourism financing remains precarious in several respects.*
 - At the federal level, the termination of the Canada-Québec Subsidiary Agreement on Tourism Development means a substantial loss of revenue for the industry, as it was an important source of funding for tourism initiatives. While the Canadian Tourism Commission, Canada Economic Development and, more recently, the Business Development Bank of Canada all administer important financial assistance programs, Québec has little power to orient these programs towards its own development priorities.
 - At the provincial level, Québec's tourism development assistance programs are not always complementary and fail to meet the industry's needs.
 - At the regional level, not all tourism regions have adopted the tax on lodging (\$2/night), a vital promotional tool. The tax is still at the implementation stage.
 - Tourist events—a trademark of Québec's tourism supply—are continually plagued with funding problems. This situation will likely get worse when the federal government passes its tobacco legislation, which fails to compensate for the ban on tobacco sponsorship of cultural and sporting events.
 - Non-profit tourism organizations and businesses (NPO) have trouble getting capital because financial institutions consider them a risk (small businesses, NPO status, seasonal demand).
 - Tourism promotion budgets are inadequate for the highly competitive international tourism marketplace.
- *There is not enough cooperation and it is too event-oriented.* Although promotional partnerships are booming, more harmonious action and more clearly defined roles within the industry are needed.
 - The regions continue to see themselves as competitors rather than partners;
 - There is not enough collaboration between regional and sectoral tourist associations;
 - Promotional efforts are dispersed throughout the Québec market (Tourisme Québec, regional tourist associations, municipal tourist bureaus, economic development corporations);
 - Government partners need to recognize Tourisme Québec as the main leader of tourism and allow it to play a more active role in this regard;
 - Canada-Québec joint action always poses a problem in terms of funding priorities.

This situation is all the more disturbing in light of the growing interest in tourism. Additional initiatives by players at all levels could make it even harder to establish priorities.

- *The current regulatory framework impedes tourism development.* The multitude and overlapping of regulations applying to tourism is a very real problem, particularly since the industry is dominated by small and medium-sized enterprises.
- *Competition from other destinations is becoming fiercer all the time.* Neither Québec's position in the international marketplace nor its position as the number one destination for Quebecers is a fait accompli. And competition will become even stiffer in the coming years: New Brunswick will continue to woo Québec travellers while Ontario is poised to reinvest huge sums in foreign markets.

Strategic directions, courses of action and measures

Four main strategic directions have been defined to guide intervention by tourism partners over the next five years:

- Make programs/services more customer-driven;
- Consolidate current markets and capture new ones;
- Guarantee tourism financing;
- Broaden the partnering approach to ensure responsible and sustainable tourism development.

Specific courses of action as well as a number of measures to be implemented over the next three years have been identified for each of the above directions. These measures are open-ended in keeping with the two criteria used to define them.

- *Realism.* Tourisme Québec decided to target measures that could be reasonably achieved within the scope of this policy and the current economic situation. The measures identified in the enclosed action plan (see Appendix) will be carried out in the short, medium or long term according to available financing.
- *Flexibility.* These measures will involve numerous players from the public and private sectors. Considering this need for public-private partnership and concerted action in an evolving industry, the action plan must be flexible so it can be tailored to new initiatives aimed at meeting future challenges for the tourism industry.

STRATEGIC DIRECTION: MAKE PROGRAMS/SERVICES MORE CUSTOMER-DRIVEN

The international tourist destinations that will come out on top will be those capable of catering to travellers' expectations. Given the increasing segmentation of customers demanding the best quality for the price, it is critical that Québec improve the quality of its tourism products/services and ensure customer satisfaction.

The key to ensuring that programs and services are customer-driven is to refocus the development of tourism supply/promotion on the "tourism experience." This experience combines the basic and animating ingredients of the tourism supply (accommodation, transportation, attractions, hospitality services, etc.) targeting selected customer segments. The shift in focus from "tourism product" to "tourism experience" reflects the changing profile of travellers and the maturity achieved by the Québec tourism industry. The similarities between tourism businesses are no longer based on a generic product, but rather on selected customer groups. Due to customer segmentation, promotional strategies need to be more targeted than ever before. This type of concept is more flexible and dynamic since it can be adapted to individual customer segments, markets, reasons for travel, products and activities.

COURSE OF ACTION : GAIN A BETTER UNDERSTANDING OF EXPECTATIONS IN ORDER TO SATISFY CUSTOMERS

Every customer has his/her own needs and expectations and chooses the destination that will satisfy those prerequisites. It is therefore crucial that the industry gain a better understanding of what interests travellers. Developing an expertise in this area will enable the industry to better identify its customer base and focus its promotional efforts accordingly. This process primarily involves creating a market intelligence system and obtaining access to the major tourism knowledge networks. **The tourism experience makes travellers' needs and expectations the industry's central concern. The customer is therefore the cornerstone of Québec's tourism development policy.**

Measure: CREATE A MARKET INTELLIGENCE SYSTEM

Market globalization and the attendant increase in competition require that the tourism supply be able to adapt rapidly to changing demand. The industry and other tourism partners must have ready access to strategic information needed for growth (knowledge of customers, competition, new ventures, etc.). To that end, the action plan includes the creation of a centre for competitive intelligence which will be operated in conjunction with the private sector in order to draw on tourism businesses' expertise and knowledge. Over the short term, Tourisme Québec will determine the system content, the required computer medium, implementation and operating costs, partners and the partnering approach. The effectiveness of our promotional efforts will hinge on how well we know travellers' expectations.

Measure: ANALYZE AND IDENTIFY PRIORITY TOURISM EXPERIENCES

The concept of tourism experience is without a doubt one of the most innovative aspects of the present policy. This experience flows from the harmonious combination of supply, demand and competition. The industry must continue to seek experiences that offer the best development possibilities. Those experiences can be identified through an analysis of demand (characteristics and size), the organization of supply and its comparative competitiveness. Tourisme Québec, in consultation with the industry, will conduct such analyses with a view to channelling funding into the development of world-class tourism experiences.

COURSE OF ACTION: ENHANCE AND PROMOTE THE QUALITY OF TOURISM PRODUCTS/SERVICES

Products, activities, services and hospitality are the basic ingredients of any tourism supply and must meet international quality standards. While Québec already has hospitality down pat, this alone does not make for a successful tourist destination. All sectors of the industry that come in contact with tourists must strive to improve quality.

Measure: INTRODUCE A QUALITY PROGRAM

The entire Québec tourism industry agrees on the urgent need to introduce international quality standards for tourism services. Thanks to government funding allocated specifically for that purpose, Tourisme Québec, in concert with the industry, will initiate a quality program which is both renewable and reliable. By the time government assistance expires, the program will be self-financing and managed by the industry. Accommodation is one of the key components of the program, since it is central to making tourists feel secure. For this reason, the first step will be to classify hotels, tourist homes and campgrounds, after which other sectors, such as tourist attractions and outdoor adventure, will be considered. In the longer term, a seal of quality (e.g. "Bonjour Québec") will serve to identify and promote tourism businesses accredited by the program.

Measure: IMPROVE TOURIST SIGNING AND REST AREAS

Since the automobile is still the major mode of access to Québec, tourist signing and roadside rest areas are critical infrastructures for inbound travellers. The existing partnership between the Ministère des Transports du Québec and Tourisme Québec will translate major initiatives into action. Two pilot projects related to tourist signing along scenic routes are under way and should culminate in a related policy (1998). Tourisme Québec will conduct pilot testing of poster advertising, notably in

the five tourist information centres located in roadside rest areas. The Ministère des Transports and Tourisme Québec will collaborate on a study on upgrading services in rest areas (poster advertising, fast-food services, visitor information, service areas, etc.) with the aim of refocusing management of these areas. To satisfy air traveller demand, Tourisme Québec and Aéroports de Montréal (ADM) will join forces to ensure adequate visitor information services at the Dorval airport.

Measure: IMPROVE CUSTOMER SERVICE

Since the tourism experience is first and foremost an experience based on human relations, qualified workers and customer service are the primary competitive factors operating in a destination's favour. Tourisme Québec thus intends to support the efforts of the Conseil québécois des ressources humaines en tourisme (CQRHT) to train tourism workers, notably by enriching occupations, recognizing qualifications and stabilizing employment. More specifically, Tourisme Québec will support the design and implementation of a customer service training program aimed primarily at managers and employees who are in direct contact with travellers. Cooperation between the Ministère de l'Éducation du Québec and the CQRHT with a view to establishing or reinforcing training programs in the areas of animation, interpretation and second-language skills will be strongly encouraged.

COURSE OF ACTION: CONSOLIDATE OUR GAINS AND TAP INTO NEW VENTURES

Québec has considerable potential in terms of quality tourism experiences. It offers a number of exciting experiences that are capable of drawing more global travellers and already enjoy international renown thanks to the combined efforts of numerous tourism partners (customer service deliverers, inbound operators, carriers). These experiences centre around eight recognized products identified in Québec's 1993-1996 tourism marketing strategy:

- City holidays
- Tours
- Resort tourism
- Downhill skiing
- Snowmobiling
- Hunting and fishing
- Outdoor adventures
- Conventions and business meetings, incentive travel.

However, travellers' expectations are constantly changing. As new needs are identified, Québec will have to develop new tourism experiences that both enrich and revitalize the eight generic products. To that end, Québec will continue to adapt its tourism supply to demand by focusing on products that have proved their mettle while gradually revitalizing them. It will bank on new ventures which show definite growth potential, including bicycle touring, ecotourism, Aboriginal experiences, soft adventure and winter tourism. Québec needs to have a better profile of travellers seeking these types of activity and fine-tune its promotional strategies accordingly. It must also make sure it has adequate tourism infrastructures in this regard and that its supply is sound enough to succeed.

Measure: STRENGTHEN MONTRÉAL AND QUÉBEC CITY'S POSITIONS AS TOURISM POLES

Montréal and Québec City play a strategic role on the Québec tourism scene. They are Québec's main showcases in the international marketplace. Montréal's dynamic economy and cultural life have earned it an international reputation, and tourism contributes significantly to supporting and fuelling that dynamism. To strengthen its competitive position, a number of projects in Montréal will receive special attention in the coming years, such as the expansion of the convention centre, promotion of cultural events, especially during winter, improvement of airport facilities and the development of waterways for marine tourism purposes. Québec City, for its part, needs to make better use of its new international-calibre amenities (convention centre, exhibition halls), upgrade its airline services and develop its natural capital (Mont-Sainte-Anne).

Measure: REINFORCE CULTURAL TOURISM

For decades, Québec's distinct culture has secured its position as a tourist destination, and Québec has succeeded in developing this distinctiveness through its numerous tourist attractions and events. An aging and increasingly knowledgeable tourist population has led to greater interest in cultural experiences. To reinforce this trend, Tourisme Québec and the concerned partners intend to help consolidate and exploit opportunity windows such as religious tourism (pilgrimages and religious heritage), genealogical tourism (family roots), gourmet dining and arts and entertainment representative of the Québécois identity and which stand out for their international calibre.

Measure: DEVELOP ECOTOURISM

Ecotourism focuses on learning by visiting quality natural and cultural sites. It is increasingly popular among travellers looking for ways to enjoy outdoor activities without harming the environment. Since Québec has an abundance of diverse natural and cultural resources, it offers significant potential for the development of this sector. Outfitting operations in particular gain from the diversification possibilities afforded by ecotourism. The conversion of a number of outfitting operations into "forest inns" offering year-round activities (hunting and fishing, nature discovery, snowmobiling, etc.) should help extend the tourist season and expand the non-urban product supply.

In collaboration with its private and public partners from a sector-based table, Tourisme Québec will prepare a guide for developing ecotourism in Québec. This guide will deal with such subjects as characterizing demand, identifying outstanding natural and cultural sites, organizing interpretative services and animating activities, and marketing. Positioning Québec as a world-class ecotourism destination will require a significant contribution on the part of government and regional partners. Government organizations will mainly be responsible for consolidating and creating a quality parks system, preserving and enhancing cultural heritage, supporting Québec's distinct and vibrant culture and protecting and embellishing sites and landscapes, while regional partners will be called on to evaluate the development potential of their most interesting ecotourism sites.

Measure: DEVELOP WINTER TOURISM

Québec is essentially a northern tourist destination and, as such, has numerous competitive advantages: excellent snow conditions, impressive list of outdoor activities, cities equipped to deal with winter, etc. Yet visitation remains largely concentrated in the summer months (45% of tourist volume). Strengthening the winter product mix is critical to increasing the profitability of tourism businesses, generating quality employment and reinforcing the international image of Québec as a singular tourist destination.

To help develop winter products and extend the tourist season, Tourisme Québec will form a sector-based table on winter tourism to:

- coordinate a campaign to promote winter sports holiday packages to Quebecers in conjunction with outdoor equipment and winter clothing manufacturers and the Ministère des Affaires municipales;
- evaluate the potential for developing winter resort destinations around outdoor activities such as snowmobiling, dogsledding, ice fishing, etc. in conjunction with inbound operators and incentive-travel organizers;
- support tourism businesses in their increased efforts to market winter vacations;
- see that school holidays are staggered throughout the winter (i.e. Ontario/Québec, Québec/Montréal students not on holiday at the same time).

In addition, Tourisme Québec will continue working with the Ministère de l'Emploi et de la Solidarité to conduct pilot projects aimed at stabilizing tourism employment.

Measure: DEVELOP AND PROMOTE ABORIGINAL TOURISM

The Amerindian presence has marked both Québec's history and culture. The novelty of this phenomenon attracts tourists—particularly European—forever in search of a new experience. With Aboriginal tourism being a growing business in Québec, and with a view to building it into a future Québec ecotourism development strategy, ensuring an authentic product and reinforcing the professionalization of tourism services are of crucial importance. Tourisme Québec intends to support the sector's development by forming a sector-based table on Aboriginal tourism to foster sustained relations with the Association touristique du Nord du Québec and Aboriginal tourism developers. In the short term, Tourisme Québec will work with Aboriginal developers and the Québec distribution system to develop a means of promoting Aboriginal experiences to European wholesalers.

Measure: ENHANCE MARINE TOURISM

Québec offers outstanding growth potential for marine tourism due to the possibilities for river navigation on the St. Lawrence and its tributaries. Where international cruise ships are concerned, Tourisme Québec and its private and public partners will draft a marine tourism development plan that includes a strategy and proposals for promoting and operating casinos on cruise ships, sensitizing cruise lines to Québec's advantages as a stopover and identifying the potential of certain sites of interest, such as the islands in the St. Lawrence and the Magdalen Islands. Furthermore, the government authorities will continue lobbying the federal government to allow casino gambling on cruise ships outside international waters.

The full potential of marine tourism, including the development of our waterways' recreational (e.g. excursions) and heritage (e.g. hydroelectric power stations and dams) resources, has not yet been tapped. This is particularly the case with the St. Lawrence, one of the world's largest rivers. Tourisme Québec will therefore encourage initiatives designed to exploit and develop the tourism potential of waterways through the production of sensitivity material and technical tools aimed at the main sectoral partners (i.e. municipalities, regional county municipalities, tourism developers and government departments).

Measure: MARKET BICYCLE TOURING

Québec's network of bicycle paths is developing fast. The "Route verte" project is aimed at making Québec one of the best cycling destinations in North America. Tourisme Québec will contribute to this new product by setting up tourism services along and near the Route verte (information, accommodation, restaurants, attractions, etc.) in addition to promoting and marketing this infrastructure. The process will be overseen by a sector-based table on bicycle touring.

STRATEGIC DIRECTION: CONSOLIDATE CURRENT MARKETS AND CAPTURE NEW ONES

Québec would be remiss if it relied solely on its primary markets and continued growth of the French market to sustain the growth of its tourism industry. It must continually devise new approaches, adapt its products and services to changing markets, be on the lookout for partnership opportunities and scout new markets; in other words, continually concoct new promotional strategies.

COURSE OF ACTION: POSITION QUÉBEC AS A UNIQUE DESTINATION

Positioning is the cornerstone of any promotional strategy: it is what makes a destination stand out from the competition. Québec's main competitive advantage is its distinct culture within North America. To travellers, Québec is special—"a North American destination not to be missed"—because of its French culture with New World overtones, reflected in the lifestyle (gastronomy, festivals), architecture, urban and rural life and scenery (winter, St. Lawrence River), all with their own regional variations.

These elements constitute the foundations of Québec's positioning in the tourism marketplace. Québec's overseas image as a modern society that is part of the North American dynamic of powerful images (great outdoors, unspoiled nature, avant-gardism) reinforces this positioning. To ensure the tourism supply reflects this, the government will give special attention to developing Québec's natural and cultural heritage, particularly its religious heritage, one of the pillars of Québec's cultural distinctness.

Measure: DEFINE QUÉBEC'S BRAND IMAGE

Québec's distinct culture within North America will also be the focus of its repositioning as a tourist destination. Tourisme Québec plays a key role in promoting Québec and its singular profile in the international marketplace. It will therefore join forces with its government partners, particularly those with a cultural mandate, to harmonize Québec's international advertising image. It will do the same with its regional partners, in particular regional tourist associations.

COURSE OF ACTION: IMPROVE MARKETING STRATEGIES

Today's tourists are no longer interested in your standard product. Rather, they are looking for a vacation experience that reflects their personal likes and needs. This segmentation requires a change in marketing approach. Instead of targeting major sociodemographic groups in national markets, marketing efforts must be directed at special-interest groups and smaller territories (urban centres). The very nature of tourism marketing will change. In order to reach consumers, it will have to rely more heavily on:

- new technologies;
- press relations, a marketing tool that draws on consumer sensitivity and intelligence;
- direct marketing that targets selected customer segments.

Measure: ESTABLISH A DESTINATION MANAGEMENT SYSTEM

Québec is one of the only Canadian destinations without an integrated information and reservation system. In order to respond adequately to customer demand for more information and reservation services (information highway, e-business), Tourisme Québec intends to set up a destination management system (DMS) consisting of an advanced electronic marketplace. Apart from its information and reservation functions, the system will facilitate direct marketing to target segments. Tourisme Québec is hoping to conclude a partnership agreement with the private sector to implement the system.

Measure: CONSOLIDATE THE QUÉBEC MARKET

Quebeckers travelling in Québec remain the base market for much of the domestic tourism industry, and this intraprovincial travel still has room for growth. Like international tourists, Québec travellers are becoming increasingly demanding and want to get their money's worth. Introducing international quality standards is therefore as vital to Québec products/services as it is to other target markets. To boost the Québec market, Tourisme Québec will:

- increase collaboration aimed at strengthening the impact of promotional activities of regional tourist associations, regional economic development corporations and tourist bureaus;
- make it easier for Quebeckers to access information (e.g. consolidation of Tourisme Québec Web site) and make reservations for Québec products (e.g. continue "ACTA-Vacances Québec" project, implement DMS);
- assess measures designed to revitalize the tourist population and encourage more Quebeckers to holiday in Québec (e.g. *chèque-vacances*);

- in consultation with the Ministère de l'Éducation, consider planning the Québec school calendar so as to extend the tourist season;
- continue working with member tourism associations of Regroupement Loisir Québec to attract and meet the needs of target segments such as persons with reduced mobility, seniors, families and young people.

Measure: PROMOTE QUÉBEC IN THE INTERNATIONAL MARKETPLACE

Capturing foreign markets requires substantial investments in promotion. That is why, in addition to expanding the Tourism Partnership Fund and negotiating a new Canada-Québec agreement on tourism development, Tourisme Québec will increase its strategic alliances with the Québec tourism industry (regional tourist associations, tourist bureaus), the distribution system and carriers in selected markets and non-traditional partners (e.g. main export industries) with a view to stepping up promotional efforts targeting markets with prospects for growth. The goal of promoting Québec in the international marketplace is to:

- *Market Québec as a singular tourist destination in North America*
Two means will be taken to increase media coverage of Québec: advertising campaigns aimed at positioning Québec on selected markets, and more press relations activities. These initiatives will go a long way towards improving Québec's international exposure.
- *Exploit potential growth markets more fully*
Markets with the highest growth potential are:
 - the United States: most major cities offer direct flights to Québec (Boston, New York, Washington, Atlanta, Chicago, Dallas, Los Angeles);
 - Europe: France, United Kingdom, Germany, Switzerland, Italy, Spain, Belgium, The Netherlands;
 - Asia: Japan, South Korea, Hong Kong, Taiwan;
 - Latin America: Mexico, Brazil.
- *Target new, high-yield visitors*
Customer segmentation leads to promotional strategies aimed at refocusing target groups, particularly in mature markets (adjacent American states, France). In the U.S., strategies will primarily target the genealogical market niche (Franco-Americans) and alternative vacation experiences (e.g. resort, cultural, environmental, Aboriginal, winter, bicycle touring) so as to introduce American travellers to products other than Montréal and Québec City. Incentive travellers will be targeted on both the U.S. and French markets.
- *Promote other regions of Québec*
Tourisme Québec will work with the regional tourist associations to introduce foreign visitors to regions other than Montréal and Québec City. International promotion of interregional tours will be favoured to create a linkage between Montréal, Québec City and the other regions.

Measure: POSITION QUÉBEC AS A CHOICE DESTINATION FOR CONVENTIONS

In the year 2000, both Montréal and Québec City will boast new and improved convention facilities. However, this will not be enough to secure a competitive edge in this highly lucrative and fiercely competitive market niche in North America. Québec will have to step up its efforts in this sector, even innovate. Two courses of action have been defined to this end:

- increase prospecting, particularly in the U.S. and foreign convention markets. In partnership with the Montréal and Québec City tourist bureaus, Tourisme Québec will engage in greater solicitation of strategic cities in the U.S. (Washington, Chicago) and Europe.
- establish incentive measures to encourage convention organizers to choose Québec.

Measure: BUSINESS NETWORKING

Closer analysis of supply and demand will serve to identify tourism experiences that hold the most promise. To help make these products more competitive, Tourisme Québec will support networking among tourism businesses interested in sharing their expertise and financing the development and promotion of integrative projects. Businesses looking to invest in the development and promotion of specific vacation experiences in the international marketplace will be grouped into networks.

STRATEGIC DIRECTION: GUARANTEE TOURISM FINANCING

The tourism industry has a strong Québec orientation.

- Tourism experiences are offered and consumed on natural and cultural resource sites.
- Tourism experiences are shaped by a wide range of local businesses and organizations.
- Three quarters of tourism expenditures go to producing goods and services in Québec.

These features enable the tourism industry to contribute significantly to the development of Québec's regions. In order to maximize the benefits of tourism development to Québec's regions and foster demand in a highly competitive international marketplace, Québec must increase public and private sector investment in both tourism development and promotion. This is a sizeable challenge in light of current efforts to clean up public finances, which dictate more efficient use of government funding in the tourism industry. The way to increased investment is through more harmonious action and new sources of financing that will maximize private sector involvement.

COURSE OF ACTION: ENSURE UTILIZATION AND MATCHING OF THE TOURISM PARTNERSHIP FUND

The Tourism Partnership Fund is beginning to take shape as a financing tool. The goal is to ensure that all regions with a tourism development policy make use of this fund.

Measure: PROMOTE THE TOURISM PARTNERSHIP FUND

The purpose of the Tourism Partnership Fund is to provide Tourisme Québec and the regional tourist associations (RTA) with funding to develop Québec's tourism industry. Revenues from the \$2-per-night tax on lodging that can be levied by RTAs will be used to promote and develop regional and interregional tourism. The tax is expected to bring in \$25 million annually. Tourisme Québec will actively support the RTAs in promoting the Fund, particularly the leverage it affords for soliciting new partners.

COURSE OF ACTION: HARMONIZE GOVERNMENT AND REGIONAL TOURISM DEVELOPMENT PROGRAMS

The numerous government and regional programs for developing tourism must be geared towards real industry needs and be complementary in order to avoid overlapping and inter-program competition. It is important that tourism businesses have ready access to information so they can determine the best program for their purposes.

Measure: REVIEW AND ADAPT GOVERNMENT AND REGIONAL PROGRAMS

The growth in tourism and attendant business opportunities have led to an increase in players and financing sources and, consequently, the multiplication of regional programs and investment funds. Each program has its own criteria and does not necessarily cover all industry needs. Because Tourisme Québec does not always have the power to see that programs are used for tourism purposes, it creates confusion among promoters and results in overlapping and inconsistencies. To ensure that intervention is as effective as possible, these financial assistance programs need to be reviewed and streamlined. This mandate will be entrusted to the interdepartmental committee on tourism whose members include the Ministère des Régions.

COURSE OF ACTION: FUNNEL FEDERAL TOURISM SPENDING INTO QUÉBEC PRIORITIES

Federal spending on tourism has swelled considerably in recent years. The federal government contributes to the development and promotion of tourism projects through programs managed by Canada Economic Development. It has also created the Tourism Investment Fund, administered by the Business Development Bank of Canada. However, the termination of the Canada-Québec Subsidiary Agreement on Tourism Development means that federal spending is less and less subject to a global vision jointly defined by the two levels of government. The danger of the new ad hoc approach favoured by Ottawa is that efforts will be disjointed. So in addition to making sure that Québec gets its due, we need to ensure that federal investments are funnelled into strategies developed by Tourisme Québec in consultation with the Québec tourism industry.

Measure: NEGOTIATE A NEW CANADA-QUÉBEC AGREEMENT ON TOURISM

The Canada-Québec Subsidiary Agreement on Tourism Development had a total budget of \$100 million (1992-1997). Considering the financial contribution of private partners, the decision not to renew the agreement could mean substantial revenue leakage for the Québec tourism industry. The Québec government therefore intends to negotiate a new agreement with the federal government in order to match federal spending to Québec priorities. Tourisme Québec will champion the need for a special agreement on tourism. Management of the agreement should be designed to facilitate coordinated action and enable integrative projects related to supply development, marketing and knowledge acquisition.

COURSE OF ACTION: IMPLEMENT A PROACTIVE SUPPLY DEVELOPMENT STRATEGY

In light of the stiff international competition in terms of positioning Québec as a world-class tourist destination, the tourism industry will have to pool as many resources as possible and spare no effort in implementing a proactive supply development strategy comprising three core elements: innovation, expertise and capital. The two main goals of the strategy will be to better coordinate public and private efforts and adapt government action to the industry's real needs.

Measure: FORM A TECHNICAL SUPPORT GROUP FOR SUPPLY DEVELOPMENT

Tourisme Québec will form a technical support group mandated to:

- develop tourism concepts;
- prospect investments and projects;
- receive and conduct a preliminary study of all tourism-related projects soliciting government assistance;
- provide technical support (help draft business plans and market/feasibility studies);
- create a network of partners;
- train managers.

The group could include representatives of public and private partners involved in supporting supply development.

Measure: SET UP A TOURISM INVESTMENT CLUB

Since many private and institutional investors recognize tourism as a worthwhile sector of investment, Tourisme Québec will encourage the consolidation of venture capital and complementarity of private and public financing by forming a tourism investment club. Overseen by Tourisme Québec, the club will be mandated primarily to promote the development of tourism supply. To this end, it will ensure maximum complementarity of financing efforts and maximum power sharing. The club will be composed of representatives from private financial institutions, government departments and agencies and venture capital corporations.

Measure: SECURE FINANCING OF TOURIST EVENTS

Québec stands out from other North American destinations in the number of popular cultural and sporting events it offers, many of which are known worldwide. These events help animate tourism products and are such important goodwill factors that Montréal is positioning its summer products around them. Financing for these events remains shaky, however. We therefore need to secure their financing and find adequate means of ensuring repeat experiences. Tourisme Québec will work with the government partners concerned to identify solutions for securing funding for national and international-calibre cultural, sporting and tourism events.

Measure: DEVELOP INTERNATIONAL COOPERATION

International cooperation will be a key element of the strategy for developing and promoting world-class tourism experiences, as it is crucial to investment prospecting, the development of expertise, research and innovation. In this respect, cooperation between France and Québec should be heightened in common-interest areas such as hospitality services, manpower development, agricultural tours and extension of the tourist season. Agreements will be entered into with adjacent destinations to facilitate projects such as the creation of bicycle path networks and hiking trails, as well as joint promotion and marketing initiatives. Greater efforts need to be made to make Québec part of international exchange networks and encourage international organizations to set up business in Québec.

COURSE OF ACTION: INCREASE PROFITABILITY OF TOURISM BUSINESSES

The growth, profitability and competitiveness of tourism-related companies depend on more than just financing. Businesses also have to minimize their operating costs. Public authorities can play a decisive role in this regard, since they partially set the rules governing business operations.

Measure: EASE THE REGULATORY BURDEN

Tourisme Québec will examine all government and municipal regulations applying to tourism businesses to determine how the regulatory burden can be eased.

COURSE OF ACTION: STUDY NEW FINANCING OPPORTUNITIES

Seeking new sources of financing, such as the tax on lodging, is the way of the future for consolidating tourism financing and delivering industry growth.

Measure: IDENTIFY NEW MEASURES

In consultation with the interdepartmental committee on tourism, Tourisme Québec will review taxation in the tourism industry, including municipal tax laws, to identify ways to secure financing.

**STRATEGIC DIRECTION: BROADEN THE PARTNERING APPROACH TO ENSURE RESPONSIBLE
AND SUSTAINABLE TOURISM DEVELOPMENT**

The tourists of tomorrow want an authentic product. It follows that tourism is becoming more and more a global experience involving all sectors of society: the tourism industry as such, export industries, resource sector industries, the cultural, outdoor recreation and leisure sectors, the social economy sector, land use planners, citizens, etc. We are also becoming increasingly aware of tourism's potential contribution to Québec's economic development. This explosion necessitates a partnering approach that is more structured than economy-driven and fosters greater public-private resource sharing.

**COURSE OF ACTION: AFFIRM TOURISME QUÉBEC'S ROLE AS UNIFYING FORCE AND LEADING GOVERNMENT
AUTHORITY IN MATTERS OF TOURISM**

The tourism industry is, by its very nature, fragmented. Since the state is best placed to assume a leadership role and champion common development interests, Tourisme Québec must assume this role and promote itself as the leading government authority to both tourism and non-traditional partners.

Measure: INTERDEPARTMENTAL COMMITTEE ON TOURISM

The tourism industry is multisectoral. The mandates and activities of numerous government departments and agencies therefore have a considerable influence on its development. The main departments and agencies concerned are the Ministère des Transports, the Ministère de la Culture et des Communications, the Ministère de l'Environnement et de la Faune, the Ministère de l'Agriculture, des Pêcheries et de l'Alimentation, the Ministère des Affaires municipales, the Ministère de la Métropole, the Ministère des Régions and the Société de développement industriel. Tourisme Québec, mandated to oversee government action in matters of tourism, will coordinate the activities of an interdepartmental committee on tourism charged with harmonizing, reinforcing and implementing government action in the tourism industry.

Measure: PERMANENT FORUM ON TOURISM

The forum on tourism was the first step towards a common vision of tourism in the new millennium. It highlighted the need to create mechanisms enabling ongoing dialogue. That is why Tourisme Québec will support a permanent advisory committee on tourism composed of traditional and non-traditional partners. The committee will be headed by Tourisme Québec. The permanent forum on tourism will be mandated primarily to ensure follow-up of the tourism development policy. In the short term, this includes drafting a strategy for consensus building and power sharing within the industry.

Measure: REVIEW THE GRANDS PRIX DU TOURISME QUÉBÉCOIS

The Grands Prix du tourisme québécois (Québec tourism awards) are the main means of paying tribute to the excellence and the contribution of businesses to the growth of the domestic tourism industry. In partnership with the industry, then, Tourisme Québec will regularly review the award categories to ensure they emphasize the corporate contribution to the objectives of this tourism development policy.

COURSE OF ACTION:**ENSURE THAT PARTNERS SHARE VALUES AND RESPONSIBILITIES**

To prevent the growing interest in tourism from degenerating into disjointed efforts and piecemeal intervention, the industry must aim for greater complementarity and synergy between the activities of traditional and non-traditional partners in tourism development. This can be partially achieved by empowering all stakeholders at all levels.

Measure: CHARTER FOR RESPONSIBLE TOURISM

The way to long-term growth of the Québec tourism industry is through sustainable resources and an authentic product. The Québec industry will thus be encouraged to adopt the principles of responsible development enshrined in the 1995 World Tourism Organization' charter for sustainable tourism development, namely, maintaining ecological integrity, ensuring sustainable use of ecosystems, ensuring the harmonious integration of tourism activities into the natural, cultural and human environment, and improving social equity of local populations. The ultimate goal of the charter is to arrive at a landscape conservation policy.

COURSE OF ACTION:**DELEGATE RESPONSIBILITY FOR REGIONAL TOURISM TO THE REGIONS**

Tourism is the centrepiece of most regional economic development strategies. It therefore stands to reason that responsibility for coordination of regional tourism promotion and development initiatives should fall to the regional tourist associations (RTA). RTAs should also be responsible for building consensus among all local and subregional partners with a growing increase in tourism.

Measure: RETHINK THE ROLE OF REGIONAL TOURIST ASSOCIATIONS

RTAs are the preferred regional partners of Tourisme Québec. Moreover, the Québec government's local and regional development support policy recognizes RTAs as the master-craftsmen of regional tourism cooperation. However, the new regional context, the creation of the Tourism Partnership Fund and the thrust of the present tourism development policy require the redefinition of Tourisme Québec/RTA partnership in several areas (marketing, supply development, inbound hospitality services, information, etc.) in order to maximize RTAs' contribution to the promotion of their region as a tourist destination.

COURSE OF ACTION:**PROMOTE THE DEVELOPMENT OF A TOURISM CULTURE TO ENSURE SUSTAINABLE HERITAGE TOURISM**

Instilling a veritable tourism culture in Quebecers and Québec institutions goes beyond a simple awareness of hospitality. It also requires that Quebecers appropriate their community, along with its history, customs, landscapes and know-how, and that they protect and enhance the most important sites in order to share them with international visitors. Tourism is not limited to promoting and developing attractions. An authentic product must also reflect Quebecers' pride in their history as well as in their architectural, natural, cultural and industrial resources. The only way to ensure sustainable heritage tourism for future generations is to make every Quebecer accountable for his/her environment.

Measure: DEVELOP LOCAL TOURISM ECONOMIES

The tourism experience is becoming more and more participatory. In addition to visiting historic or natural sites and enjoying the scenery, tourists want to discover the local culture. We therefore need to develop various facets of Québec's cultural life and introduce tourists to them, particularly by supporting the development of new local and community tourism-driven economies. This involves a range of initiatives by the communities (e.g. hospitality villages), local organizations and small businesses in the agricultural (e.g. farm produce, agricultural tours), cultural (e.g. music, dance, decorative arts), educational (e.g. site interpretation) and social economy sectors.

Measure: RAISE THE LEVEL OF AWARENESS OF HERITAGE TOURISM IN QUÉBEC

We need to welcome international visitors to Québec with more than just "bonjour". Travellers are no longer satisfied with a polite and courteous reception; they want to make contact. So if Quebecers are to become good tourism ambassadors, they will have to learn more about and appreciate their rich tourism heritage. Many non-traditional partners have a role to play in achieving this goal, particularly the education system (e.g. history and geography courses, winter sports classes), television (serials filmed in Québec's regions) and government (measures encouraging in-province travel). In concert with its partners from the interdepartmental committee on tourism and the permanent forum on tourism, Tourisme Québec will strive to implement measures to this end.

Conclusion

THE SUCCESS OF THIS POLICY IS UP TO ALL QUEBECKERS

Several countries are banking on tourism to ensure sustainable economic growth.

Québec can and must carve itself out a niche in the highly competitive international tourism market. Those destinations that succeed in setting themselves apart by offering a unique product will obviously come out on top. And Québec has everything it takes to do just that. It is up to the tourism industry to promote Québec's treasures globally and take the first crucial steps towards the industry's sustainable development.

It is time to act. Not just the government but rather all partners in tourism have a role to play. The success of this policy hinges on the capability of each and every player to assume this responsibility and help sell Québec to the world.

Appendices

Action Plan

STRATEGIC DIRECTION: Make programs/services more customer-driven

COURSE OF ACTION	MEASURES	TIMETABLE			PARTNERS
		1998 1999	1999 2000	2000 2001	
Gain a better understanding of expectations in order to satisfy customers	■ Create a market intelligence system	X	X		UQAM Tourism Chair and permanent forum on tourism
	■ Analyze and identify priority tourism experiences		X	X	
Enhance and promote the quality of tourism products and services	■ Introduce a quality program	X	X	X	CSETQ, industry SQPT, MTQ CQRHT
	■ Improve tourist signing and rest areas	X	X	X	
	■ Improve customer service	X			
Consolidate our gains and tap into new ventures	■ Strengthen Montréal and Québec city's positions as tourism poles	X	X	X	Permanent forum on tourism, interdepartmental committee on tourism, private developers
	■ Reinforce cultural tourism	X	X	X	
	■ Develop ecotourism	X	X	X	
	■ Develop winter tourism		X	X	
	■ Develop and promote Aboriginal tourism	X	X	X	
	■ Enhance marine tourism		X	X	
	■ Market bicycle touring	X	X	X	

Action Plan

STRATEGIC DIRECTION: Consolidate current markets and capture new ones					
COURSE OF ACTION	MEASURES	TIMETABLE			PARTNERS
		1998	1999	2000	
		1999	2000	2001	
Position Québec as a unique destination	■ Define Québec's brand image	X			Industry, MRI
Improve marketing strategies	■ Establish a destination management system	X	X		Bell/associated businesses consortium
	■ Consolidate the Québec market	X	X	X	RTA
	■ Promote Québec in the international marketplace		X	X	RTA, sectoral associations, industry, CCT
	■ Position Québec as a choice destination for conventions	X			OCTGM, OTCCUQ
	■ Business networking	X	X		Industry

Action Plan

STRATEGIC DIRECTION: Guarantee tourism financing					
COURSE OF ACTION	MEASURES	TIMETABLE			PARTNERS
		1998 1999	1999 2000	2000 2001	
Ensure utilization and matching of the Tourism Partnership Fund	■ Promote the Fonds de partenariat touristique	X	X	X	RTA
Harmonize government and regional tourism development programs	■ Review and adapt government and regional programs		X	X	Interdepartmental committee on tourism
Funnel federal tourism spending into Québec priorities	■ Negotiate a new Canada-Québec agreement on tourism	X			Ministère des Régions, SAIC
Implement a proactive supply development strategy	■ Form a technical support group for supply development		X	X	SDI, SGF, FSTQ, etc. Interdepartmental committee on tourism
	■ Set up a tourism investment club		X	X	
	■ Secure financing of tourist events	X	X	X	
	■ Develop international cooperation				
Increase profitability of tourism businesses	■ Ease the regulatory burden	X	X		Interdepartmental committee on tourism, other government departments, sectoral associations
Study new financing opportunities	■ Identify new measures			X	

Action Plan

STRATEGIC DIRECTION: BROADEN THE PARTNERING APPROACH TO ENSURE RESPONSIBLE AND SUSTAINABLE TOURISM DEVELOPMENT

COURSE OF ACTION	MEASURES	TIMETABLE			PARTNERS
		1998 1999	1999 2000	2000 2001	
Affirm Tourisme Québec's role as unifying force and leading government authority in matters of tourism	■ Interdepartmental committee on tourism	X	X	X	RTA
	■ Permanent forum on tourism	X	X	X	
	■ Review the Grands prix du tourisme québécois	X	X	X	
Ensure that partners share values and responsibilities	■ Charter for responsible tourism		X		
Delegate responsibility for regional tourism to the regions	■ Rethink the role of regional tourist associations	X	X		ATRAQ, RTA, sectoral associations, Fédération des offices de tourisme
Promote the development of a tourism culture to ensure sustainable heritage tourism	■ Develop local tourism economies		X	X	Interdepartmental committee on tourism, permanent forum on tourism
	■ Raise the level of awareness of heritage tourism in Québec		X	X	

N.B.: The measures contained in this action plan will be implemented in the short, medium and long term according to available financing.

Elements of customer-driven intervention

