



Québec Tourism Strategy North of the 49th Parallel

CULTURES AND WILDERNESS TO DISCOVER





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PRODUCTION

THANKS ARE EXTENDED TO THE PLAN NORD TOURISM WORKING GROUP
AND ALL THE REGIONAL TOURISM STAKEHOLDERS WHO CONTRIBUTED
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A WORD FROM THE PREMIER

NORTHERN QUÉBEC: A FASCINATING AREA

Northern Québec's sheer size and tremendous possibilities are fascinating. Few destinations have unexplored areas as rich in tourism potential. North of Québec's 49th parallel, landscapes and natural and heritage environments have endured through the ages, their image shaped by local populations who have become the stakeholders of one of the world's most captivating northern expanses. Today, conditions are right for its rediscovery. The Québec Tourism Strategy North of the 49th Parallel: *Cultures and Wilderness to Discover* has an exciting project to propose to northerners and all of Québec: promoting the emergence of a new tourist destination that combines the cultures, nature and specialty foods of their exceptional regions.

Accordingly, carefully preparing the future of tourism in northern Québec is essential. A substantial effort will be made by the Government, in partnership with the regions, to sustainably develop our tourism potential, while gradually intensifying promotion and marketing.

The 21st century is inviting us to make Northern Québec a new world-class tourist destination whose visibility will contribute to enhancing Québec's reputation on international markets. I see this Strategy as an opportunity to work toward a better future for the communities occupying the land north of the 49th parallel and I invite you to join us in this project.



A handwritten signature in black ink, which appears to read 'Jean Charest'.

Jean Charest
Premier of Québec

A WORD FROM THE MINISTER OF TOURISM

ATTRACTING TRAVELERS EAGER FOR FRESH DISCOVERIES AND ENCOUNTERS

International travelers are increasingly attracted by new destinations for a fresh and original vacation experience. Northern Québec has exceptional assets to appeal to these novelty-seeking clientele. The cultures, values and languages of its inhabitants enable the area north of the 49th parallel to compete with the most spectacular destinations in the world.

The Québec Tourism Strategy North of the 49th parallel: *Cultures and Wilderness to Discover* will provide Québec and its northern regions with tangible means to make their mark. It is based on three key factors: innovation, respect and partnership. In the North, you can see far and think big. This Strategy gives us the opportunity to achieve a sustainable tourism model that will make Québec known throughout the world.

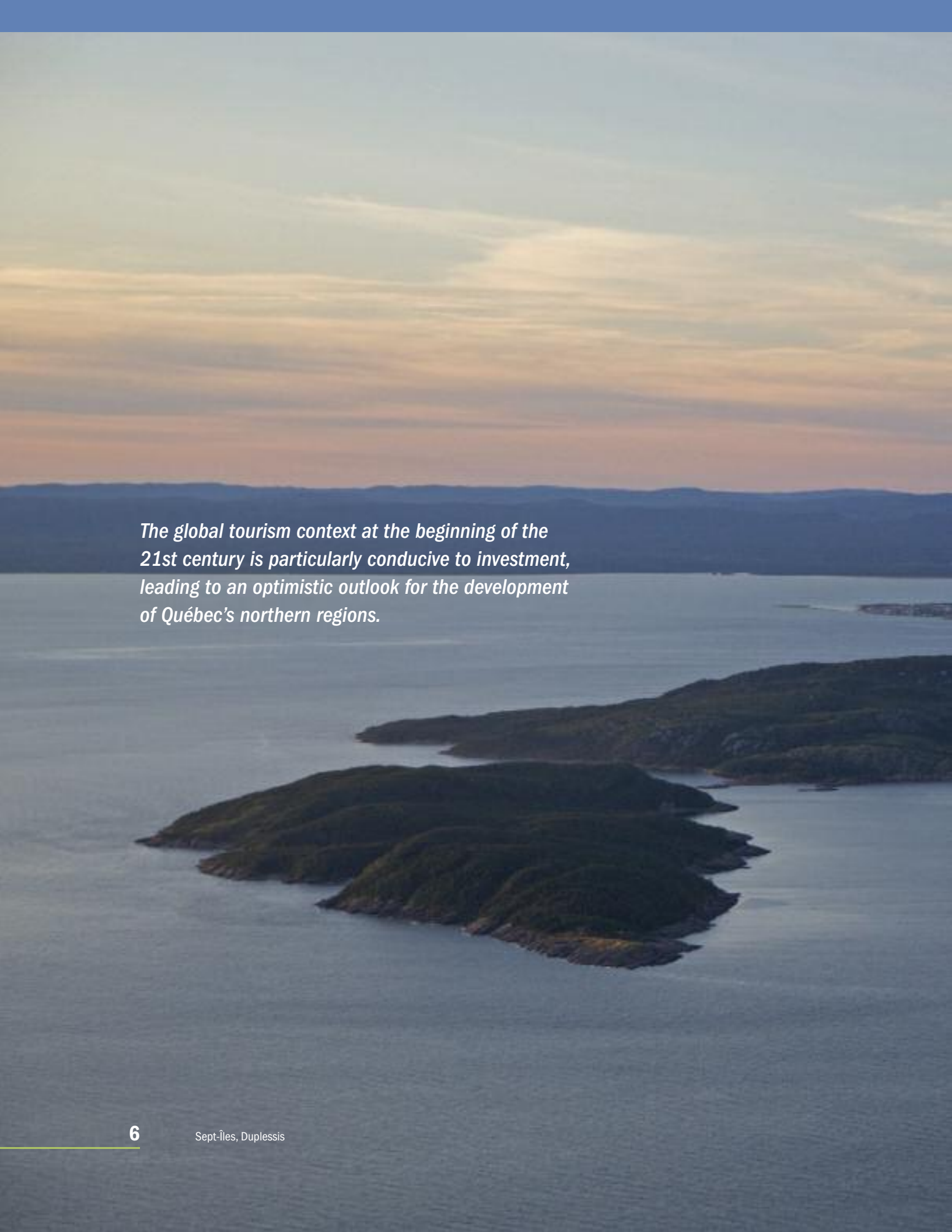
Inuit, Cree, Innu, Naskapi, Jamesian, North-Shore and Lac-St-Jean communities will be key players in the process. Having had the chance to explore this vast area, I would like to pay tribute to these women and men who have managed to preserve their identity and who are now building the future while respecting traditions. Our efforts are aimed at maximizing the economic, social and environmental benefits of tourism in their regions.

Before us is the extraordinary opportunity to work on building a new destination with innovative and original tourism products that focus on authenticity, professionalism and high-quality hospitality and services. Together, these elements will make a stay in northern Québec an unforgettable experience for our visitors.



A handwritten signature in black ink, which appears to read "Nicole Ménard".

Nicole Ménard
Minister of Tourism

An aerial photograph of a coastal region, likely in Quebec, Canada. The scene features a vast expanse of blue water in the foreground and middle ground. Several large, dark green, forested islands and peninsulas are scattered across the water. In the background, a range of low mountains or hills stretches across the horizon under a sky with soft, orange and yellow hues, suggesting a sunset or sunrise. The overall atmosphere is serene and scenic.

The global tourism context at the beginning of the 21st century is particularly conducive to investment, leading to an optimistic outlook for the development of Québec's northern regions.

A BOLD STRATEGY

In the context of the Plan Nord, the Premier of Québec announced his intention of establishing a new economic model that will benefit local communities and Québec as a whole. *Cultures and Wilderness to Discover* is the Strategy proposed by the Minister of Tourism for developing and marketing northern tourism regions.

The goal of this Strategy is to make northern Québec a genuine international tourist destination. Its wild, unspoiled beauty provides infinite potential for discovery, exploration and escape. With globalization and advances in transportation, the Far North, like the Antarctic, has become the final frontier in our collective imagination.

The widespread reputation enjoyed by Québec's northern regions is largely due to the popularity of hunting and fishing activities in the network of northern outfitters. The quality of the North's exceptional lakes, rivers, wildlife and vegetation has been attracting clientele interested in these products for decades.

The global tourism context at the beginning of the 21st century, marked by growing interest on the part of experienced, interested travellers in authentic and unusual discoveries, is particularly conducive to investment, leading to an optimistic outlook for the development of Québec's northern regions.

The area covered by the Strategy includes the Nunavik, Baie-James and Eeyou Istchee, and Duplessis tourism regions, as well as parts of the Manicouagan and Saguenay-Lac-Saint-Jean regions situated north of the 49th parallel. Together they represent 72% of Québec's total area, with a population slightly over 120,000.

Because of their special geographic and sociocultural characteristics, the regions north of the 49th parallel require a distinct form of action, capable of adjusting to local reality. The combination of newly emerging tourism development with wilderness and Aboriginal culture provides both a unique opportunity to renew Québec's tourism supply and a challenge for the sustainable development of this unspoiled territory.

There are major issues involved in developing and promoting tourism in northern Québec. Distances are great and travel costs high. Tourism products are largely undeveloped and need structuring. Knowledge about potential markets and clientele is still at the embryonic stage.

With these many challenges, the creation and emergence of a new northern destination requires the concurrence of all partners and the commitment of communities and local businesses.



Mabec Outfitter, Sept-Îles, Duplessis



Plan Nord Tourisme Working Group

**THE TERRITORY COVERED BY THE STRATEGY
(NORTH OF 49TH PARALLEL)***



— Tourist regions boundary

* Anticosti and North of Gaspésie are not included in the territory covered

THE QUÉBEC GOVERNMENT'S COMMITMENT

Establishing a northern tourism strategy reflects the Québec government's determination to contribute to collective wealth while investing in the future of these emerging tourism regions. The Strategy provides support for regional development already spurred by the recent creation of national parks and the addition of new ports of call for cruise passengers.

Québec and its northern regions have the opportunity to invest in creating and marketing a high-quality tourism product, based on an approach that puts host and visitor at the very heart of the Strategy. Bringing together everyone with a role to play is the key to success. The Strategy is based on an approach that gives precedence to local stakeholders, skills and resources.

For example, the jobs created are intended to contribute to economic development and youth retention, of course, but also to enable culture to be maintained and transmitted, since the tourism products and services will be based precisely on this cultural dimension. This is an economically and socially significant contribution. Every action will have an impact on the communities and the land. That is why the Strategy proposes policy instruments tailored to this context, easier access to financing, increased support from experts and specific resources for regional partners.

In this way, the Québec government intends to step up its efforts by providing tourism stakeholders north of the 49th parallel with the means to develop their regions, relying on the dynamism and vitality of their communities.

The Strategy aims to pool the experience and knowledge of the various stakeholders and build exciting partnerships to tap this potential. Measures that are planned, coordinated and implemented with both development and marketing in mind will enable the destination to evolve and become more competitive. These measures are planned to strike a balance between the growth of supply and client demand, by aligning marketing efforts with developments in tourism products and supply.

The focus will mainly be on developing infrastructures, developing tourist attractions and products, investing in training and human resource management, promotion and marketing, and partnerships.

Lac Guillaume-Delisle, Nunavik



VISION

By 2021, to make the area north of the 49th parallel a world-class sustainable tourism destination providing an authentic, exceptional and safe tourism experience that combines the coexistence of northern peoples and respect for nature, in a perspective of entrepreneurial development and collective wealth.

The Québec Tourism Strategy North of the 49th Parallel invites the northern tourism industry to take advantage of favourable circumstances and trends in 21st century markets. In more concrete terms, the vision proposed to northern populations today is the following:

By 2021, to make the area north of the 49th parallel a world-class sustainable tourism destination

A particular segment of international clientele, especially from Europe, is showing a growing interest in northern Québec. The necessary measures should be taken, in agreement with the populations and at their own pace while meeting client expectations, to make it a highly competitive destination.

Providing an authentic tourism experience

Northern Québec's tourism products reflect the people and the land. There are exciting opportunities north of the 49th parallel for developing and marketing products that will attract the interest of international clienteles: nature/culture/specialty food discoveries, adventure tourism and ecotourism, observation activities, northern cruises, and hunting and fishing.

Exceptional and safe

The Strategy relies on developing high-quality products that also incorporate all aspects of visitor safety. A significant investment will be made in training human resources accordingly.

That combines the coexistence of northern peoples and respect for nature

The involvement of regional economic stakeholders is crucial to tourism development. Establishing fair and profitable partnerships, in particular between Aboriginal and non-Aboriginal businesses, is one of the best ways to achieve it.

In a perspective of entrepreneurial development and collective wealth

Local empowerment and maximizing local and regional benefits are the key factors guiding all government measures related to the Strategy. Businesses, development organizations and local and regional cooperatives will play leading roles in the tourism industry of tomorrow.

Landscape, Mingan Archipelago National Park Reserve of Canada, Duplessis



SUSTAINABLE DEVELOPMENT AND PARTNERSHIPS

Four principles will guide the implementation of the Tourism Strategy:

- The sustainable development approach will permeate all aspects and strategic choices of tourism development and promotion issuing from implementation of the Strategy, among other ways, by maximizing the economic, social and environmental benefits for northern populations and reducing the potentially negative impacts of tourism development.
- Ongoing support will be provided to community businesses and stakeholders.
- Priority will be given to developing tourist activities and attractions that highlight the cultural and natural characteristics of the region. This development will be carried out with interested communities, taking into account their hosting capacity and tourism potential.
- Support programs and the standards governing them will be tailored to regional realities.

ASSETS

The Government is proposing to develop the assets that best characterize the tourism value of Québec's North: nature, culture and specialty foods.

Nature

The portion of Québec north of the 49th parallel compares favourably with competing destinations in terms of natural resources. It features an impressive network of protected areas, thousands of lakes and rivers, exotic wildlife and vegetation, both terrestrial and marine, the exceptional ecosystems of the boreal forest, taiga, tundra and marine environments, as well as hundreds of kilometres of coastline along James, Hudson and Ungava Bays, the estuary of the Fleuve St-Laurent (St. Lawrence River) and the Golfe du St-Laurent (Gulf of St. Lawrence).

Specialty foods

Major efforts will be made to showcase specialty foods and local fine cuisine in tourism packages. Tasting fresh crab and sampling cloudberry jam in the Côte-Nord region or enjoying arctic char and local herbal tea in Nunavik will significantly enhance the quality of a visitor's experience.

Specialty foods



Culture

The vibrant ancestral cultures of the Inuit, Cree, Naskapi and Innu nations coexist with the lifestyles of Jamesian, North Shore and Lac St-Jean communities. These particularly ingenious peoples have always been able to adapt to their demanding environments. Means of transportation such as dog sleds or kayaks, as well as clothing, housing and food, reflect a remarkable capacity to adapt to climatic and geographic conditions. This potential for innovation is still present. Cultural stays in Aboriginal communities and original festivals, such as the Puvirnituq Snow Festival or the Festival du Conte et de la Légende de l'Innucadie, are examples of innovative products, which eloquently illustrate the authenticity the regions have to offer.



Snowshoeing, Nunavik



Walking Out Ceremony

THE REGIONS COVERED

The Tourism Strategy will contribute to structuring an economic sector that provides interesting possibilities for job creation in small communities. Tourism jobs are particularly well matched to northern realities. Well-planned tourism promotes the transfer of traditional knowledge between generations, helps keep young people in the area and contributes to enhancing cultures and territories.

The diagnoses conducted by several northern countries converge: only innovative, attractive and authentic tourism products will stand out. Northern Québec has significant potential in this regard because of its sheer size, scenic landscapes and the characteristics of its inhabitants.

In terms of tourism and socioeconomic factors, the areas covered by the Plan Nord are both similar and distinct. Aboriginal and non-Aboriginal peoples coexist, sharing the same space. Mineral and energy resources are increasingly being developed in these regions, which will lead to growth in business tourism for the benefit of the communities.

Regional tourism associations (ATR) are very present in each region covered by the Strategy. They are active in developing and promoting tourism and welcoming tourists but are limited in their ability to meet the high expectations of their clientele, due in particular to the breadth of the area, considerable development needs and the small size of the tourism industry. Communities are generally small and their economic development is based on cooperatives or the social economy. To date, efforts have focused mainly on creating nature and culture projects for niche clienteles rather than planning and organizing mass tourism, which is necessarily more commercial, because of the limits imposed by population size and hosting capacity. Some centres, such as Sept-Îles, Baie-Comeau, Havre-Saint-Pierre, Kuujuaq or Chibougamau, however, can target larger numbers of tourists given their existing infrastructures.

Polar bear, Nunavik



NUNAVIK: QUÉBEC'S ARCTIC

Nunavik lies north of the 55th parallel. The majority of its inhabitants are Inuit. Inuktitut, French and English are spoken there.

In Inuktitut, Nunavik means “place to live.” Nunavik, with its Arctic wildlife, vegetation and climate, has only recently shown interest in tourism and its products are still under-developed, except for hunting and fishing. These products are offered on a seasonal basis by about one hundred outfitters distributed across the area, where the business environment is strongly influenced by fluctuations in the herds.

New products focusing on nature and Inuit culture are emerging. Small adventure tourism businesses created in Puvirnituq and Kangiqsujuaq welcome visitors eager for new horizons. Successful partnerships with businesses in southern Québec have also been developed in the past few years. A few Canadian and foreign companies are offering northern cruises. An extensive network of protected areas including several national parks is being set up, offering particularly promising opportunities for tourism. Two national parks, Pingualuit and Kuururjuaq, are already open to visitors. Others will be added later, including Tursujuq and Monts-Pyramides. This huge network of more accessible, high-quality protected areas participates in structuring the supply of outdoor activities and becomes a flagship product for ecotourism and adventure tourism clientele. It will most likely be the cornerstone of future development.

The Nunavik region is solely accessible by air. Each of the region's fourteen communities has an airport. Both Kuujuaq's, on Ungava Bay, and Puvirnituq's, respectively on Ungava and Hudson bays, can accommodate large aircraft.

The Makivik Corporation, which owns Air Inuit and First Air, plays a strategic role in terms of access to the region. The Fédération des coopératives du Nouveau-Québec, which operates a network of hotels, outfitters, a cultural and adventure tourism business and a travel agency, is also a major tourism development stakeholder.

The Kativik Regional Government plays a leading and coordinating role in Nunavik tourism. The region has targeted tourism as a niche of excellence as part of the ACCORD (concerted cooperative action for regional development) process. A committee composed of all the partners has developed an action plan under the theme of northern tourism, cultural diversity and adventure tourism, which ties in nicely with the Québec Tourism Strategy North of the 49th Parallel. The region's vision for tourism development is based on empowering local populations and developing a supply that highlights Inuit culture and Nunavik's natural environments and exceptional scenery.

Nunavik: the place to live

Parc national des Pingualuit, Nunavik



BAIE-JAMES AND EYYOU ISTCHEE: ONE REGION, TWO PEOPLES

The Baie-James and Eeyou Istchee tourism regions, located between the 49th and 55th parallels, are at a stage of development comparable to Nunavik's. Although remote, they are accessible by road, which is a major asset. There is also an airport in almost every community.

Two peoples with distinct cultures coexist in the Baie-James area, the Crees and Jamesians. The Crees have been in the area for millennia and have managed to preserve their language and culture. Their ancestral lands span the Baie-James area, with a population distributed in nine villages, five of which are located along the coasts of James and Hudson bays. They are Mistissini, Oujé-Bougoumou, Waswanipi, Nemaska, Waskaganish, Eastmain, Wemindji, Chisasibi and Whapmagoostui. The Jamesians live in the towns of Chibougamau, Chapais, Matagami and Lebel-sur-Quévillon and in the communities of Radisson, Valcanton and Villebois. The languages spoken are Cree, French and English.

The Crees are working together to develop their cultural and adventure products, integrating their knowledge of the land and traditional way of life. The Baie-James (James Bay) coast offers opportunities for bird and marine mammal observation as well as adventure activities. Tours of the major hydroelectric developments, winter tourism, and hunting and fishing are the James Bay area's flagship products. Adventure tourism and ecotourism products are emerging, offering visitors opportunities for new discoveries through guided activities. The Aanischaukamikw Cultural Institute in Oujé-Bougoumou, a major facility to preserve Cree heritage and culture, will be well worth the trip.

Currently, hunting and fishing account for most of the area's tourism activity. The coexistence of peoples, the presence of diverse ecosystems, a major drainage system, two wildlife sanctuaries with exceptional fishing, and the imminent creation of a national park in the Albanel-Témiscamie-Otish area, give it very interesting development potential. There also, a network of protected areas is being set up, including a second national park, Assinica. In terms of economic and tourism development, the Société de développement de la Baie-James plays a significant role in various projects, especially through partnerships with the two regional tourism associations, Tourisme Baie-James and Eeyou Istchee Tourism.

Bark tepee, Baie-James



Two peoples with distinct cultures

THE CÔTE-NORD: A PROMISING REGION

In some ways, the Côte-Nord region and especially the Golfe-du-Saint-Laurent area are similar to the Nord-du-Québec tourism regions: remote, high travel costs, unspoilt wilderness, vast expanses and low population density. There are a few larger towns, including Baie-Comeau and Sept-Îles. More than fifty outfitters offer hunting and fishing, including ever-popular salmon fishing.

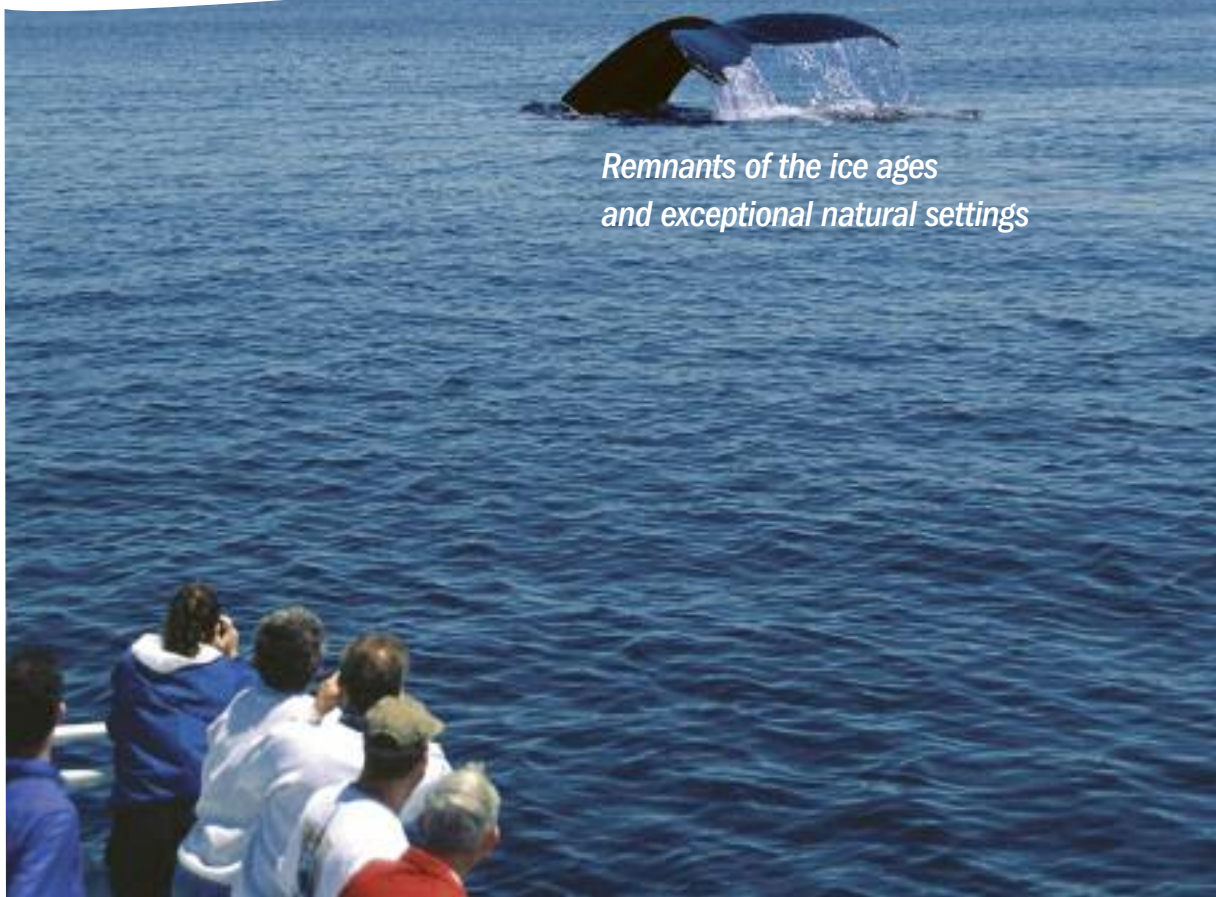
The area offers diversified products. The natural settings of the Côte-Nord region are easily accessible by road as far as Natashquan. They are suited to many outdoor, adventure tourism and ecotourism activities: hiking, sea kayaking, observing marine mammals, river rafting or canoeing, exploring the Route Blanche and Route Bleue, and visiting the Mingan Archipelago National Park, remnants of the ice ages and exceptional natural settings, such as the Groulx Mountains, several protected areas and the Manicouagan-Uapishka World Biosphere Reserve, which covers a huge area where all development follows sustainable development principles.

The potential for Aboriginal tourism is relatively untapped but promising, due to the presence of several Innu communities along the Fleuve St-Laurent (St. Lawrence River) and the Naskapi community near Schefferville. The Naskapi village of Kawawachikamach is located in the Duplessis tourism region, while Nuchimiyuschiiy (“hunting territory” in Naskapi), the area where the Naskapi have exclusive harvesting rights, is in Nunavik.

At the end of Highway 138, Natashquan is an expanding natural and cultural centre and an interesting gateway to Golfe-du-Saint-Laurent communities accessible solely by boat or by air.

COSTE, a new sustainable tourism solidarity cooperative, which is working to develop and market tourism products in the Minganie and Golfe-du-Saint-Laurent areas, is an example of community empowerment that will accelerate development of the tourism industry in that area.

Longue-Pointe-de-Mingan, Duplessis



*Remnants of the ice ages
and exceptional natural settings*

SAGUENAY-LAC-SAINT-JEAN: LAND OF GRAND RIVERS AND ADVENTURE

The portion of this region that lies north of the 49th parallel is still largely undeveloped in terms of tourism. It covers the northern part of three regional county municipalities, Fjord-du-Saguenay, Maria-Chapdelaine and Domaine-du-Roy. There is a centre of nature tourism activities and bio-food development in the Girardville area and the area north of the Rivière Mistassini. There are also about thirty hunting and fishing outfitters north of the 49th parallel. Several majestic rivers, popular with canoe and kayak enthusiasts, are very well suited to water-based adventure tourism. They include the Ashuapmushuan, Mistassini, Mistassibi and Péribonka rivers. The community of Mashteuiatsh and projects to showcase Innu culture are major assets for the region.

Saguenay-Lac-Saint-Jean has created a niche of excellence in adventure tourism and ecotourism as part of the *ACCORD* project and the Strategy will tie in with the region's chosen course of action.

*Showcasing Innu culture:
an asset*

Réserve faunique Ashuapmushuan,
Saguenay-Lac-Saint-Jean



MAJOR ISSUES

Developing and promoting tourism in northern Québec involves significant challenges. Distances are great and travel costs high. This aspect will have to be considered and mitigation measures looked into. Tourism products are largely undeveloped and need structuring. Knowledge about these products on the markets and about target clientele is still embryonic.

DEVELOPING TOURISM SUPPLY

Involving communities and local businesses in setting up tourism products and services is critical for the emergence of a new destination and the creation of a striking brand image and powerful marketing tools. The products must adequately meet the expectations of target clientele. Infrastructures, as well as accommodation, hospitality and tourist information services, need to be consolidated. The northern tourism products put on the market have to be diversified, decidedly innovative and competitive. Nature and the cultures that set our northern regions apart must be developed in a manner respectful of community priorities.

Marketing will have to be done responsibly, in keeping with developments in the quality of supply and the hosting capacity of communities.

Investments will be needed to increase regional capacity for workforce training. Accordingly, regional expertise and human resources must be strengthened. Specialized training in tourism will have to be more accessible and better adapted to the specific needs of northern regions. As a complement, the knowledge of Aboriginal elders must be recognized and used in the development of cultural tourism and in training activities.

Entrepreneurship has to be developed and more support offered to promoters. Therefore, special coaching mechanisms or measures are needed. To foster strong, viable entrepreneurship, access to assistance programs and financing must be improved and the high cost of goods in northern regions taken into account. Business partnerships that benefit local communities must be facilitated to maximize the positive impacts of tourism in the area.

Finally, in the context of the Plan Nord, the various uses of the territory must be harmonized to preserve access to high-potential natural and cultural sites for tourism development by future generations.

To prepare for marketing Québec's northern destinations, strategic knowledge of markets and clientele must be improved and used to guide the development of tourism supply and products. Investments in promotion and marketing have to be coordinated and well targeted, and judicious strategy used to maximise their effect. Finally, marketing will have to be done responsibly, in keeping with developments in the quality of supply and the hosting capacity of communities.

CLIENTELES AND MARKETS

Northern and polar tourism attracts a fairly specialized clientele. The largest pool of potential clients is in the 25 to 55 age group and consists of educated people with higher than average incomes who have been to several "exotic" destinations. Women are often in the majority. This clientele wants to explore new or emerging northern destinations.

In France, one of Québec's major markets, a dozen specialized tour operators share the northern tourism market. Their packages are personalized and designed exclusively for small groups. Products and services must be tailored to their needs and, consequently, only development of products that focus on quality and authenticity can be considered in Québec's northern regions.

Northern destinations must constantly innovate to meet the high expectations of these clientele. In terms of other markets, clients most likely to be interested in northern tourism are from the United States, Canada, Germany and the United Kingdom. Some northern regions have also noted the presence of new visitors from Italy, Mexico, Australia, New Zealand and Japan.

SUCCESS FACTORS

Generally speaking, there has been strong worldwide growth in northern and polar tourism in the last twenty years. This growth is being felt in the cruise industry, and, to a lesser extent, in nature tourism.

Over the past ten years, several northern destinations have had growth rates exceeding those generally observed for tourism around the world. This applies particularly to Antarctica, Patagonia, Iceland and Alaska. In other cases, northern destinations have experienced particularly strong growth rates for specific products. These include cruises in Norway and Greenland and the Santa Claus Village in Rovaniemi in Finnish Lapland. The highest growth rates in competing northern or polar destinations are generally related to one of the following factors: significantly improving accessibility to the destination, establishing a major mass tourist attraction, or increasing the number of cold-water cruises.

Patagonia and Iceland are particularly interesting examples with regard to improving accessibility. Patagonia experienced exponential growth in 2000 once an international airport was inaugurated at El Calafate, the gateway to several national parks and other natural areas. From barely 2,350 in 2000, the number of arrivals at the airport rose to 150,000 in 2004, climbing to more than 215,000 in 2009. For its part, Iceland experienced an annual growth rate of about 11% from 1997 to 2007, and welcomed 495,000 international tourists in 2010. This increase coincides with the presence of new or improved air links between Iceland and major cities in Europe and the United States, along with an intensive campaign publicizing the new *Iceland Naturally* brand image.

A thorough understanding and more detailed reading of the market can guide the development of tourism supply and ensure that it adequately meets the needs of target clientele.

For Rovaniemi, a town of 60,000 people in Finnish Lapland, the creation and marketing of a major attraction were the most important growth factors. Opening an amusement park on the Santa Claus theme at the Arctic Circle significantly increased local tourism. From 1995 to 2005, local income from tourism rose by 45%. Every year, Rovaniemi welcomes thousands of tourists who generate about 500,000 overnight stays in the town's hotels, mainly concentrated in the period before and after Christmas. This model is not likely to be implemented here in the short term, though, because of the limited hospitality infrastructure in most of Québec's northern villages. However, Rovaniemi's success suggests that northern-themed tourism products aimed at the general public could be successfully developed in communities that have a greater hosting capacity and that are gateways to northern regions. Such products would help to create greater visibility for the destination, which could foster the emergence of small businesses that can cater to more specialized clientele.

Incidentally, a thorough understanding and more detailed reading of the market can guide the development of tourism supply and ensure that it adequately meets the needs of target clientele.

In the cruise industry, the last decade has seen a significant increase in the number of cold-water cruises. This rise is a sign that major cruise lines are interested in diversifying their supply to hold on to more experienced cruise customers seeking new destinations. The cruise industry is responsible for much of the growth in tourism in Antarctica, Alaska, Scandinavia and Greenland. Although the cruise formula produces a rapid increase in the volume of tourists, it is not optimal from the local destination's point of view. Cruise passengers spend considerably less per capita than clients interested in more specialized packages. It takes a high volume of passengers to generate significant benefits for local communities, which then need well-organized tourism products. Communities that serve as embarkation and debarkation ports will be in a better position to benefit quickly from cruise potential.

THE STRATEGY

OBJECTIVES

The Strategy aims to renew Québec's tourism supply by developing new products and attractions and encouraging the growth of small- and medium-sized businesses, which will diversify the economy of northern regions. The Strategy will translate into targeted action, carried out in cooperation with regional and government partners.

LINES OF ACTION

The aim of the Québec Tourism Strategy North of the 49th parallel: *Cultures and Wilderness to Discover* is to develop world-class tourism. Efforts will focus on developing distinctive infrastructures, tourist attractions and products, on human resource training and management, on promotion and marketing, as well as on the importance of working in partnership.

WORKING IN PARTNERSHIP
Developing business partnerships with community businesses and stakeholders.
DEVELOPING HIGH QUALITY INFRASTRUCTURES
Consolidating the accommodation industry.
Diversifying the tourism activities of northern outfitters.
Fostering the creation of regional tourist welcome and information centres.
FOCUSING ON DISTINCTIVE ATTRACTIONS AND PRODUCTS
Supporting the organization of supply and the creation of ecotourism, cultural tourism, Aboriginal and adventure products.
Supporting the emergence of northern local fine cuisine and specialty food products.
INVESTING IN HUMAN RESOURCE TRAINING AND MANAGEMENT
Supporting initiatives for training human resources in tourism to strengthen skills in the regions.
Supporting tourism business managers in the management of human resources, diversification of their activities and quality of their infrastructures and services.
Supporting and encouraging pilot projects and business missions.
PROMOTING AND MARKETING THE DESTINATION
Developing marketing tools compatible with Québec's brand image.
Fostering partnerships with businesses in the distribution network and intensifying marketing efforts.

WORKING IN PARTNERSHIP

The implementation of the Québec Tourism Strategy North of the 49th Parallel is based on partnership. Combining the strengths of all stakeholders is the key to success. The Québec government is committing itself, with its partners, to making the necessary efforts.

The focus will primarily be on strengthening partnerships with regional tourism associations. Although they fulfill their core mandates, to ensure the Strategy's success they need to have access to specific resources in order to support the emergence of world-class tourism north of the 49th parallel.

Establishing partnerships, especially between Aboriginal and non-Aboriginal businesses, will be encouraged. They will serve as growth levers for each of the parties involved. In the past few years, professional and technical exchanges between businesses in Québec's North and South have proved to be a winning combination. The focus will be on maintaining and further developing them.

Qualifying projects therefore should support any form of activity aimed at developing expertise, such as hiring specialized resources, experts and senior advisors. In the special case of Nunavik, the Kativik Regional Government's extremely active role in development to date will be specifically considered and supported, in close cooperation with the Nunavik Tourism Association.

The Ministère du Tourisme will enter into special agreements with the organizations concerned.

Lac à l'Eau claire, Nunavik



DEVELOPING HIGH QUALITY INFRASTRUCTURES

Tourist accommodation

Generally speaking, the measures supported will primarily focus on organizing infrastructures in the area to accommodate small groups of tourists who are looking for close contact with local communities and would like a nature experience. The infrastructures should facilitate this contact.

Most of the hotels making up the accommodation inventory north of the 49th parallel have a classification of two or three stars and need to improve the quality of their infrastructures and services. Diversifying the types of accommodation available is also necessary, since most were designed for a clientele of workers.

Since the accommodation network is the fundamental infrastructure of the tourism industry, the projects supported must take the emergence of leisure tourism into consideration, in addition to targeting existing business travelers, who often ensure the establishments' profitability. Promoters will be invited to propose innovative projects, whose design and services are inspired by the history and characteristics of the geographic and human environment.

Examples of qualifying projects:

- Developing novel architectural concepts for both permanent and rustic infrastructures that creatively evoke the land and cultures of northern Québec
- Projects related to activities showcasing the region's assets: nature, culture and specialty foods

Outfitting operations

Hunting and fishing outfitters are mature products that have contributed to creating awareness of Québec's northern regions in recent decades. Emerging trends suggest that there is potential for outfitters to develop soft adventure and nature discovery activities. They will be encouraged to improve their infrastructures and services and diversify the activities they offer.

Various non-harvesting activities in natural environments could be set up, since they correspond to the expectations of new clienteles. Some outfitters are located in areas particularly suited to carrying out these new activities, due to the quality of the landscape and environment, and the presence of lakes, rivers, mountains or specific wildlife.

Examples of qualifying projects:

- Winterizing cabins to develop winter tourism
- Improving comfort and quality to attract resort, soft adventure, or ecotourism clienteles
- Adding complementary infrastructures that foster clientele diversification

Regional tourist welcome and information centres

Since the network of information centres is largely undeveloped, planning and setting up centres in these huge areas where road or air access is a challenge must be carefully thought out. In addition to welcoming tourists, these centres should highlight the area's natural, cultural and human attractions to become venues for transmitting living culture. The emphasis should be on exploring parks and discovering archaeological, heritage or historical sites. Pooling resources and having multiple uses for facilities will also be encouraged.

Example of qualifying projects:

- Tourist welcome and information centre with workshop, multi-purpose hall for holding shows, exhibitions, meetings or drop-in coffee hours

Mabec Outfitter, Duplessis



FOCUSING ON DISTINCTIVE ATTRACTIONS AND PRODUCTS

Building on nature, culture, and specialty foods as assets, the focus will mainly be on consolidating and enhancing high-quality products and services for specialized clientele. The projects supported will target developing nature discovery, adventure and tourism activities that allow contact with Aboriginal cultures and the great outdoors—in short, that will make the stay unforgettable.

Supporting the organization of tourism supply

Qualifying projects should be in a position to stand out and be marketable as packages. Cultural activities and nature will be at the heart of the products.

In addition, since the area is suitable and appealing for off-trail snowmobile and off-road vehicle use, projects associated with this type of activity will also be considered.

A major issue in these areas is safety. To ensure the safety of clients engaged in adventure tourism activities, communities and regional partners will be encouraged to develop or update their risk management procedures as new tourism activities are developed in the area. They will also be asked to provide the necessary training for guides working in this industry.

Examples of qualifying projects:

- Outdoor infrastructures such as water trails, hiking trails or others
- Backup infrastructure for cruises; road or river shuttle services
- The creation and consolidation of adventure tourism products
- Support for bringing adventure tourism risk management up to standard

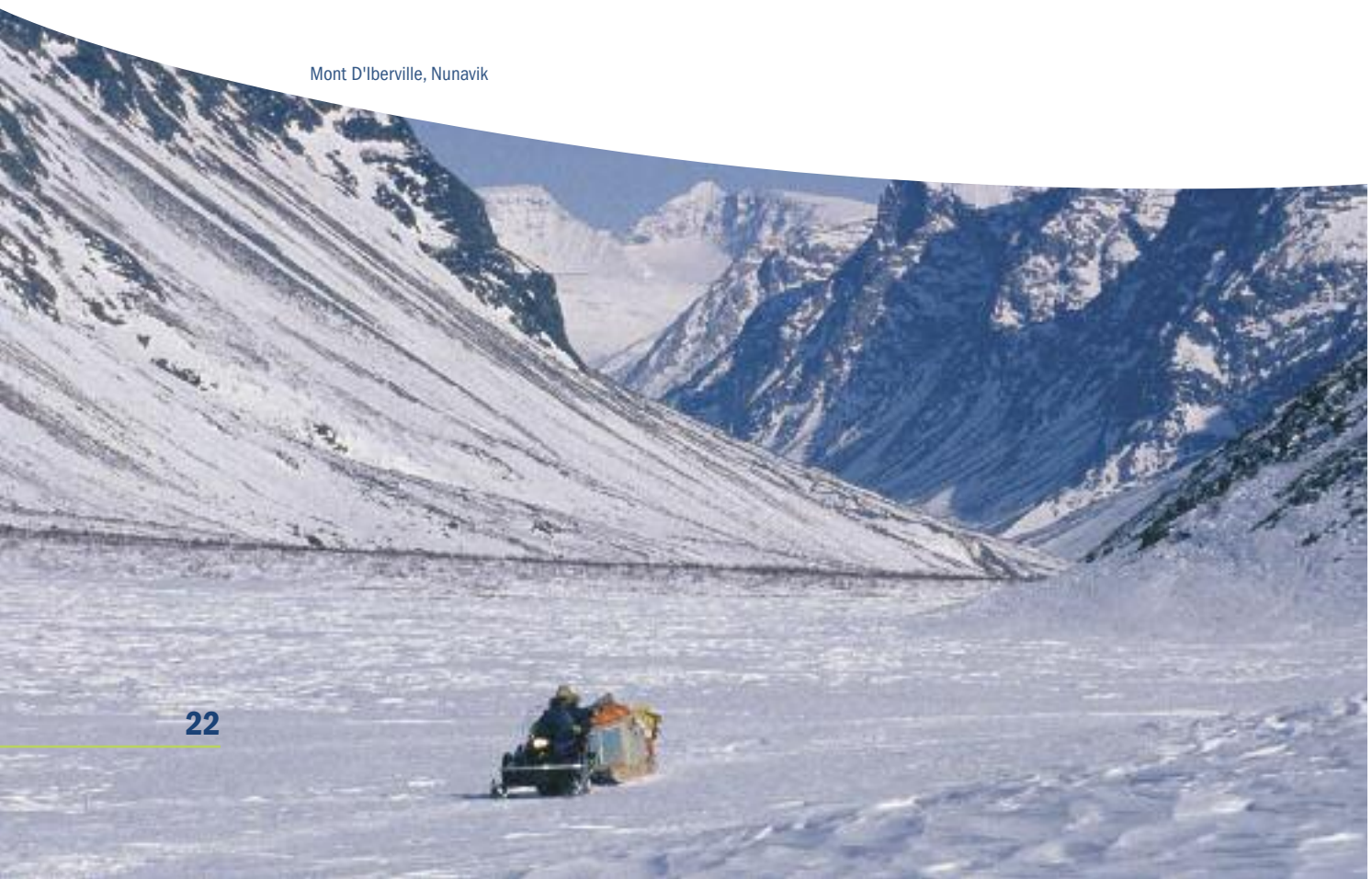
Regional cuisine and specialty foods

Québec's northern regions are well equipped in terms of restaurants, except in Nunavik, where there are very few. For the most part, the quality and variety of menus will need to be improved, and offering specialty food products would provide a considerable advantage. In this context, initiatives to develop and showcase regional bio-food products, focusing on specialty food and seafood products, will be encouraged.

Examples of qualifying projects:

- Developing a regional fine cuisine that takes local constraints into consideration
- Encouraging the use of regional products, such as seafood from the North Shore, in hotels, outfitters, attractions and tourist services

Mont D'Iberville, Nunavik



INVESTING IN HUMAN RESOURCE TRAINING AND MANAGEMENT

Strengthening the tourism skills of human resources, who are at the very heart of nature, culture and specialty food products, will be prioritized. Efforts will be put into training in all areas of tourism, including business management, hospitality, risk management, guiding and interpretation. The emphasis should be on enhancing the quality of services provided and the skills of managers and staff, particularly in hotels and restaurants. Guide training should also be tailored to the environment and the area in order to adequately ensure the safety of adventure clients.

Trainer training projects, initiatives for transferring knowledge between Aboriginal elders and tourism stakeholders, and workplace training will be encouraged.

Examples of qualifying projects:

- Customized training in hotel work and food service
- Developing management tools
- Various guide training courses for cultural, adventure and ecotourism products
- English and French courses
- Green management of tourism businesses

PROMOTING AND MARKETING THE DESTINATION

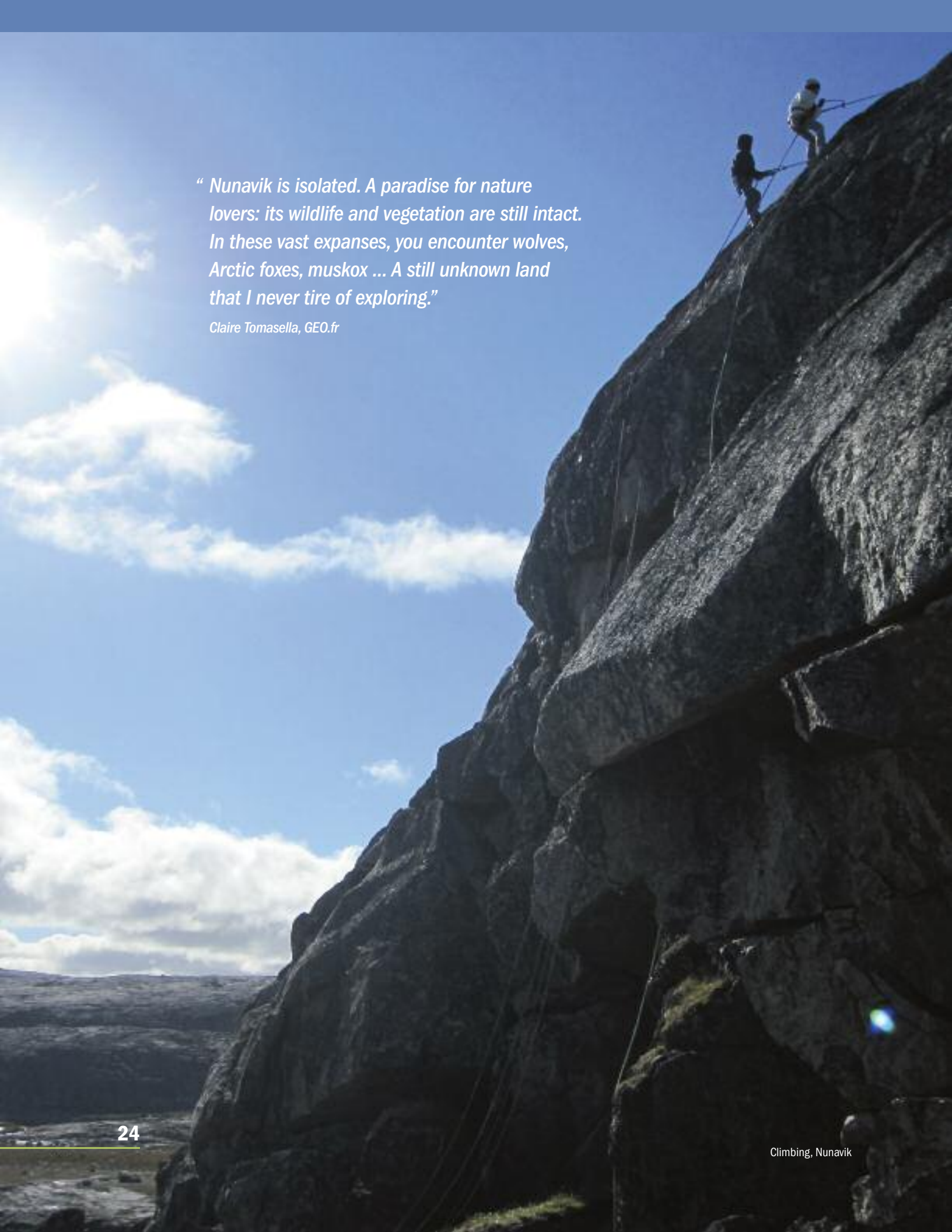
Emphasis will be placed on concerted efforts to promote and market Québec's northern regions on markets outside Québec to improve their positioning, increase their visibility and reach target clientele.

Developing a high-quality supply in conjunction with its marketing should be prioritized, since it is strategic in the context of product development and emerging destinations.

Examples of qualifying projects:

- Press trips and familiarization tours
- Participating in specialty shows, tourism scholarships and trade fairs
- Organizing world-class sports-related or other types of events

A special monitoring on changes in growth of tourism clientele and major trends influencing northern and polar tourism has been set up by the Ministère du Tourisme, involving the Tourism Intelligence Network of the Chair in Tourism of the University du Québec à Montréal. It will lead to a better understanding of trends and markets.



“ Nunavik is isolated. A paradise for nature lovers: its wildlife and vegetation are still intact. In these vast expanses, you encounter wolves, Arctic foxes, muskox ... A still unknown land that I never tire of exploring.”

Claire Tomasella, GEO.fr

FINANCIAL FRAMEWORK

The Strategy will be implemented over a period of ten years and will lead directly to investments of \$70 million in developing the tourism industry north of the 49th parallel. The Québec government's financial contribution to investments in the Strategy will be \$32 million over ten years.

The Québec government will support projects that are in line with the Strategy and based on business plans with the prospect of financial viability.

A specific assistance program for tourism development north of the 49th parallel will be implemented by the Ministère du Tourisme. This program will be adjusted to take the reality and specific context of the regions covered into consideration.

Spending on human resource training will be borne directly by Emploi-Québec within the framework of its programs.

DISTRIBUTION OF TOTAL INVESTMENTS ¹			
TARGETED MEASURES	2011-2015	2016-2021 ²	TOTAL
Development of tourism supply (infrastructure, attractions and products)	\$23 M	\$26 M	\$49 M
Marketing	\$6 M	\$7 M	\$13 M
Training of human resources	\$2 M	\$2 M	\$4 M ³
Regional expertise	\$2 M	\$2 M	\$4 M
Total	\$33 M	\$37 M	\$70 M

¹ These amounts include investments by partners.

² Expenditures for this period are estimated—they will be reviewed in light of the results of the first years of the Strategy's implementation.

³ These expenditures will be made according to need—the amounts required for human resource training and management will be borne by Emploi-Québec out of its regular budget and as part of its measures.

Cree traditional drum



ECONOMIC IMPACT

The economic benefits generated by the Strategy's implementation will be twofold. First, government and private sector investments will have a direct impact on the economy of the North and of Québec as a whole. Second, these investments will result in an increase in the volume of tourists and tourist spending in the North, generating significant economic benefits.

Investments

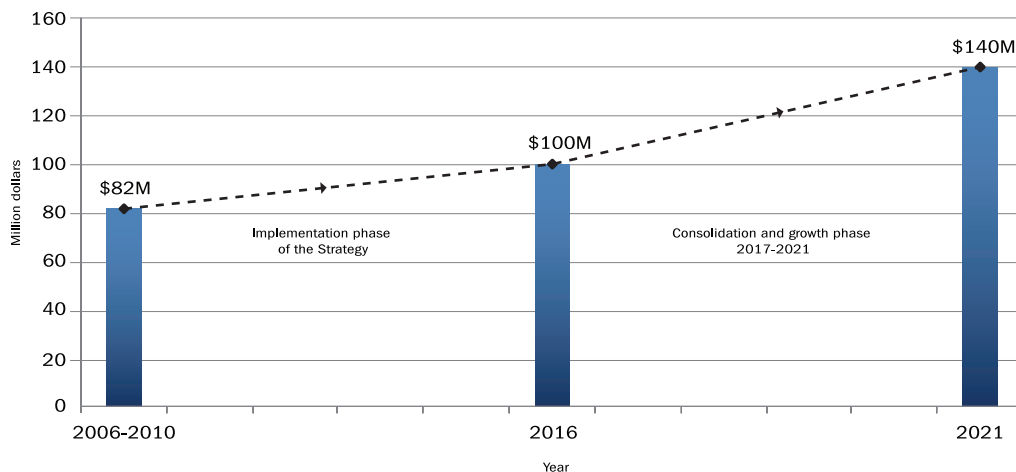
By 2021, the Ministère du Tourisme expects public and private investments generated by the Strategy, particularly in infrastructures, to be in the order of \$70 million. These investments will generate \$57.7 million in gross domestic product (GDP) and \$2.8 million in tax revenue for the Québec government.⁴

⁴ Data relating to the economic impact of investments was compiled by the Ministère du Tourisme from the 2009 edition of the document "Les tableaux d'impact économique du modèle intersectoriel du Québec, un instrument d'analyse efficace et fiable", Québec, Institut de la Statistique du Québec.

Bonne Espérance, Duplessis



INCREASE IN TOURIST SPENDING NORTH OF THE 49TH PARALLEL (MILLION DOLLARS)



Tourist spending⁵

More importantly, the investments and other efforts made will increase annual tourist spending in the North from \$82 million to \$140 million⁶. This 71% overall increase represents an average annual growth rate of 5.5% for the entire North.

Cumulatively, a total of \$1.16 billion will be spent by the end of 2021 by tourists in the regions north of the 49th parallel. Expected tourist spending will produce benefits of over \$845 million in value-added to the Québec economy. A simulation of the economic impacts of tourist spending establishes that each time a tourist spends \$100 north of the 49th parallel, about \$80 will be added to Québec's GDP.

5 Tourist spending includes trip-related travel expenses incurred by all members of a group for stays of one or more nights. These charges may have been paid by individuals, a government or a private sector company. The expenditures include the following: accommodations, travel within a country, food and beverages, leisure and entertainment, and others (souvenirs, shopping, photos, etc.) (Source: Statistics Canada).

6 The increase in tourist spending was estimated by the Ministère du Tourisme from average tourist spending over the last five years in the four tourism regions north of the 49th parallel and a percentage of average tourist spending in two other tourism areas partly located north of the 49th parallel. An average annual growth rate of 4% was used for the first five years of the Strategy and an annual growth rate of 7% for the second five-year period, reflecting improved accessibility to the area and development of infrastructures for accommodation and for tourism products.

« These experiences prove transformative, connecting me deeply with the powerful natural world in this distant land, and with the people who live in it. »

Costas Christ, National Geographic Traveler



CONCLUSION

Over the years, the preservation of these sensitive areas has forged a very special bond between the communities and the land. The bond has produced a living culture, not only adapted to the land, but part of its very essence. The communities will be key stakeholders in northern tourism. They are its soul—the focal points and actors of the journey and the discovery. The Québec Tourism Strategy North of the 49th Parallel is therefore based on communities being intimately involved in tourism development. In fact, it is one of the most striking and original features of the Strategy.

Their involvement is all the more central given that the expected benefits of these measures and of the Plan Nord as a whole will accrue to the communities. At the heart of this economic growth are the jobs created or maintained by tourism. In addition to improving quality of life and youth retention, these jobs will contribute to transmitting the values and lifestyles of northern peoples. Through tourism, they will play a major social and cultural role, creating a bridge between generations and between people of the North and South. These jobs will also make every tourist a witness to different cultures as well as to the threats they face, such as climate change and undue influence that could destabilize environments, both natural and social. Tourism should not be an exacerbating factor but, on the contrary, should become one of the links between development and respect for the environment, and between creating wealth and maintaining a vibrant culture.

The economic benefits of tourism in the area will be considerable. The investments and overall efforts made in the context of the Plan Nord will increase tourist spending in northern regions. This increase will also have an effect in Québec's South, considering that businesses will have to purchase a significant amount of their supplies outside northern regions.

For all these reasons, developing tourism in the area north of the 49th parallel is a strategic initiative in which the Ministère du Tourisme is asking all partners who are committed to making the North a discovery and meeting place to get involved.

Umiujaq, Nunavik



Cloudberries



Cree Shaputuan

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