



ALLIANCE DE L'INDUSTRIE TOURISTIQUE DU QUÉBEC

PARTENAIRE DE RÉUSSITE



**TOURISME
AUTOCHTONE
QUÉBEC
ABORIGINAL
TOURISM**

On the agenda

01

Economic outlook for tourism in Quebec

02

The Alliance – an overview

03

Challenges and strategic approach

04

Marketing approach and partnership



95M
visitors

\$15.1B

Tourism revenues

2.5%
GDP

32,000
businesses
(11%)

376,000
jobs
(9.2%)

3rd
-largest
export sector



Outside of Quebec

53% spending
24% tourism

33.5M

Tourists

\$9.7B

Tourist
expenditures





Flying
high

2017



20.8M

Growth –
international
arrivals in Canada

2017

5.9%



British
Columbia

2M

7.9%



Ontario

2.8M

7.2%



Canada

10.7%/
13% target markets



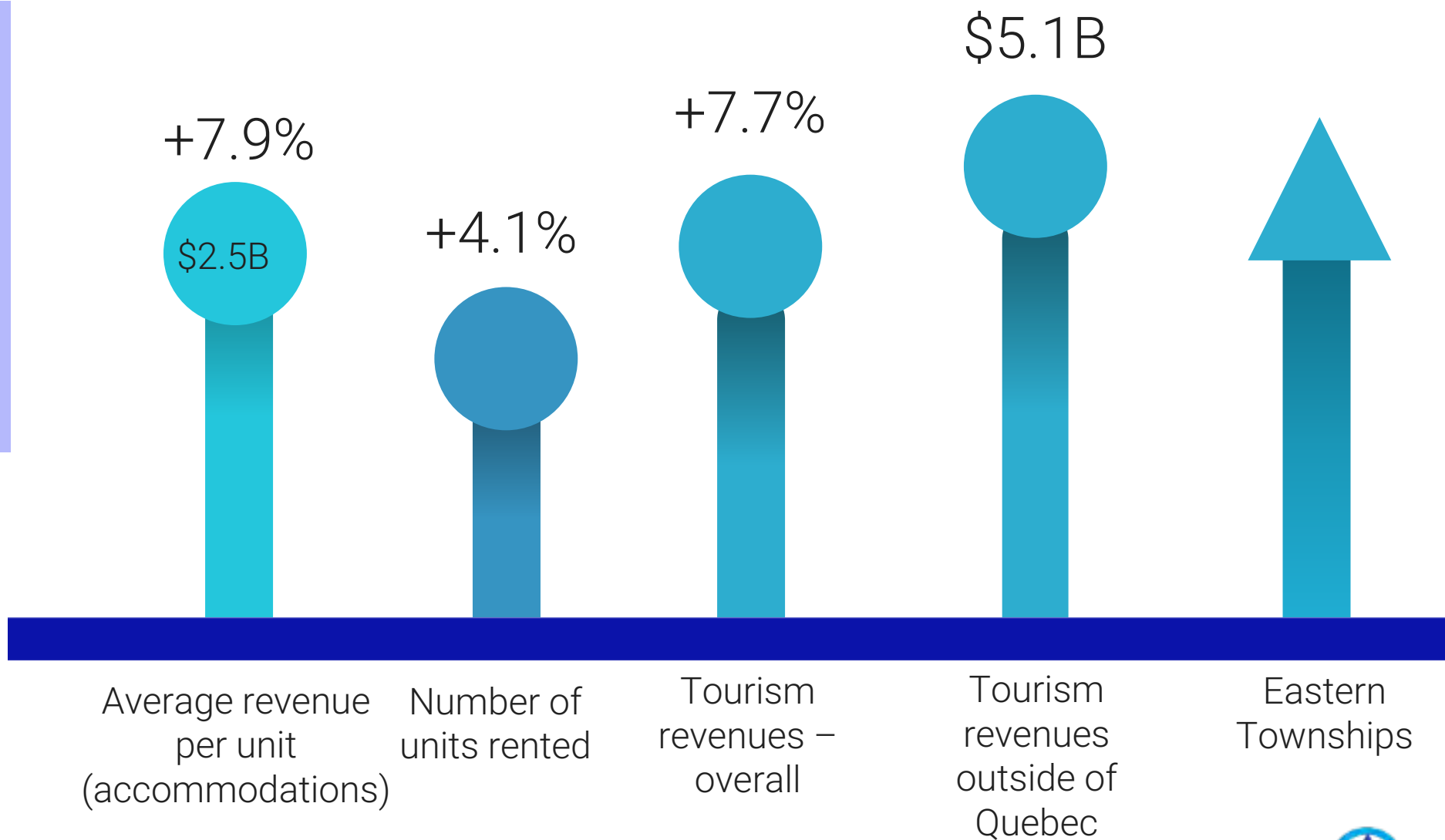
QUEBEC

1.2M

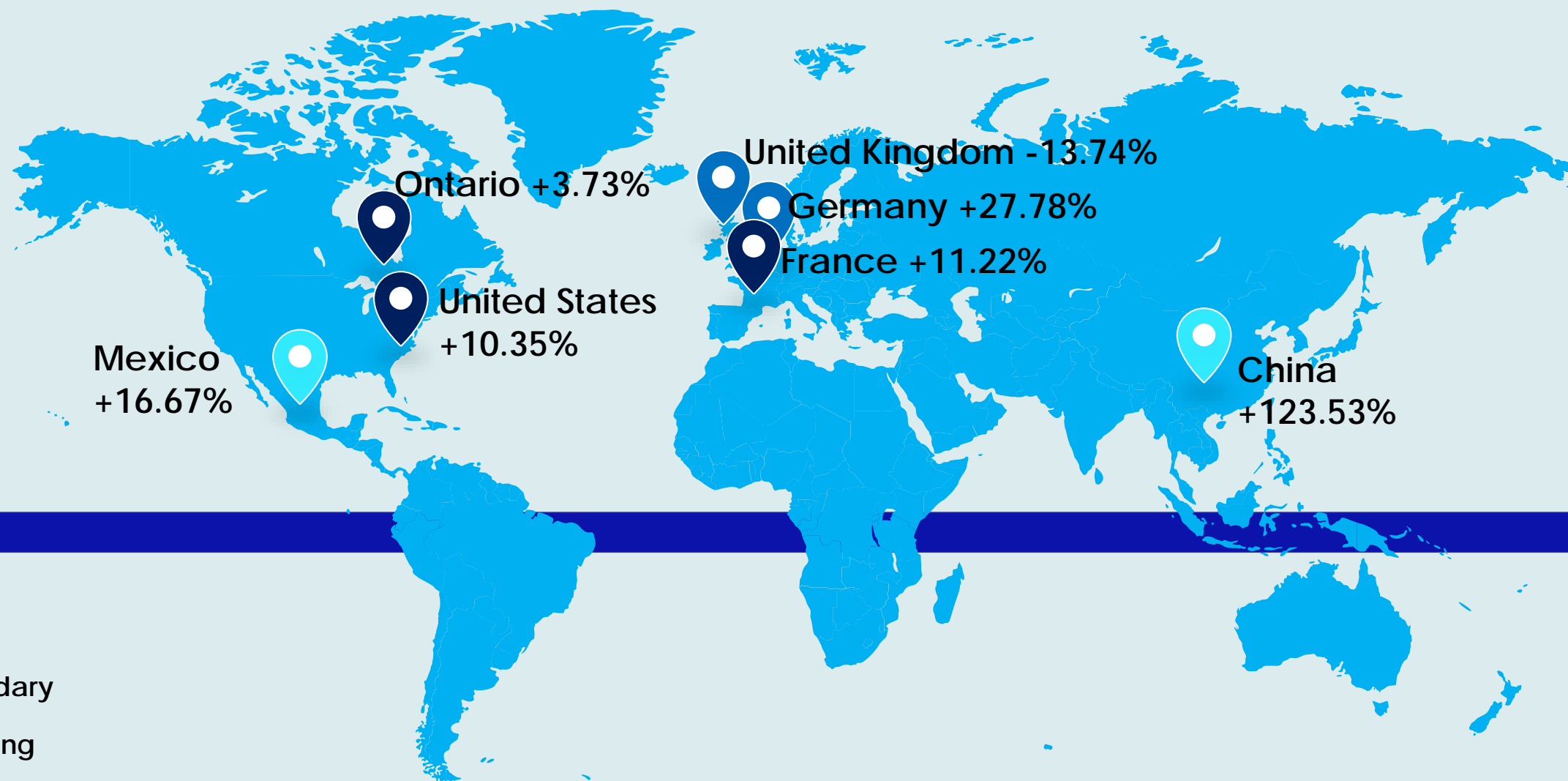


Quebec-wide success

2017



Revenue growth – markets outside of Quebec (\$5.1B)



- Priority
- Secondary
- Emerging



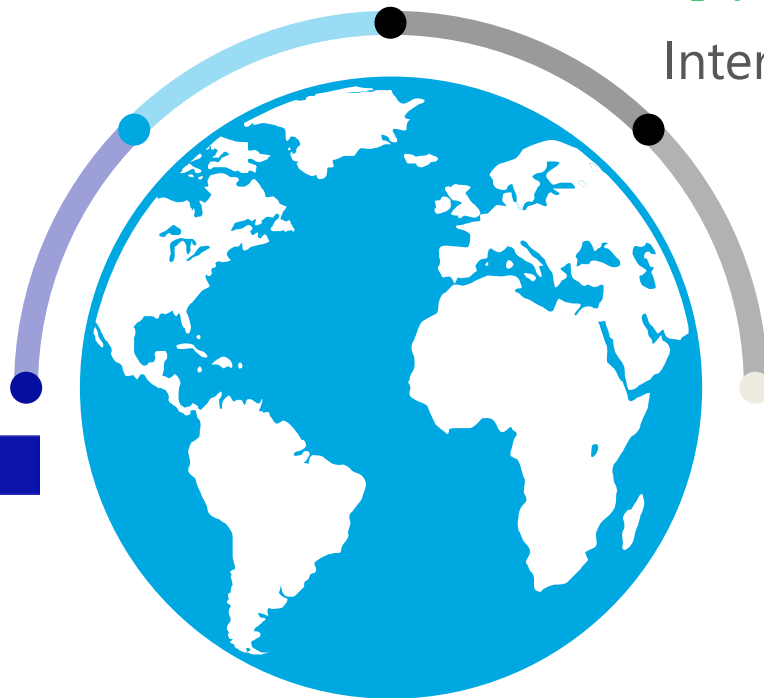
World outlook for tourism growth

+ 3.3%

Annual growth forecast for international arrivals by 2030

1.3B → 1.8B

International tourists in 2030



A major opportunity



2 | The Alliance – an overview

Bring together,
coordinate and
represent

tourism associations
and companies, to
drive industry
performance



Acting as
an Alliance

through direct
participation in
developing and
marketing the
visitor experience





ALLIANCE DE L'INDUSTRIE
TOURISTIQUE DU QUÉBEC
PARTENAIRE DE RÉUSSITE

**BUSINESS
ORGANIZATION**

(association and corporate members)

**AGENT
AND PRODUCER**

(business partnership)





AN INNOVATIVE MODEL

Gaining industry insights,
for the industry's benefit

WORKING TOGETHER

Under the umbrella of one
business organization,
operating province-wide

STRENGTH

10,000+ companies
represented by 40 tourism
associations

Strong representation

17 Board members
representing all sectors,
including at least
12 entrepreneurs



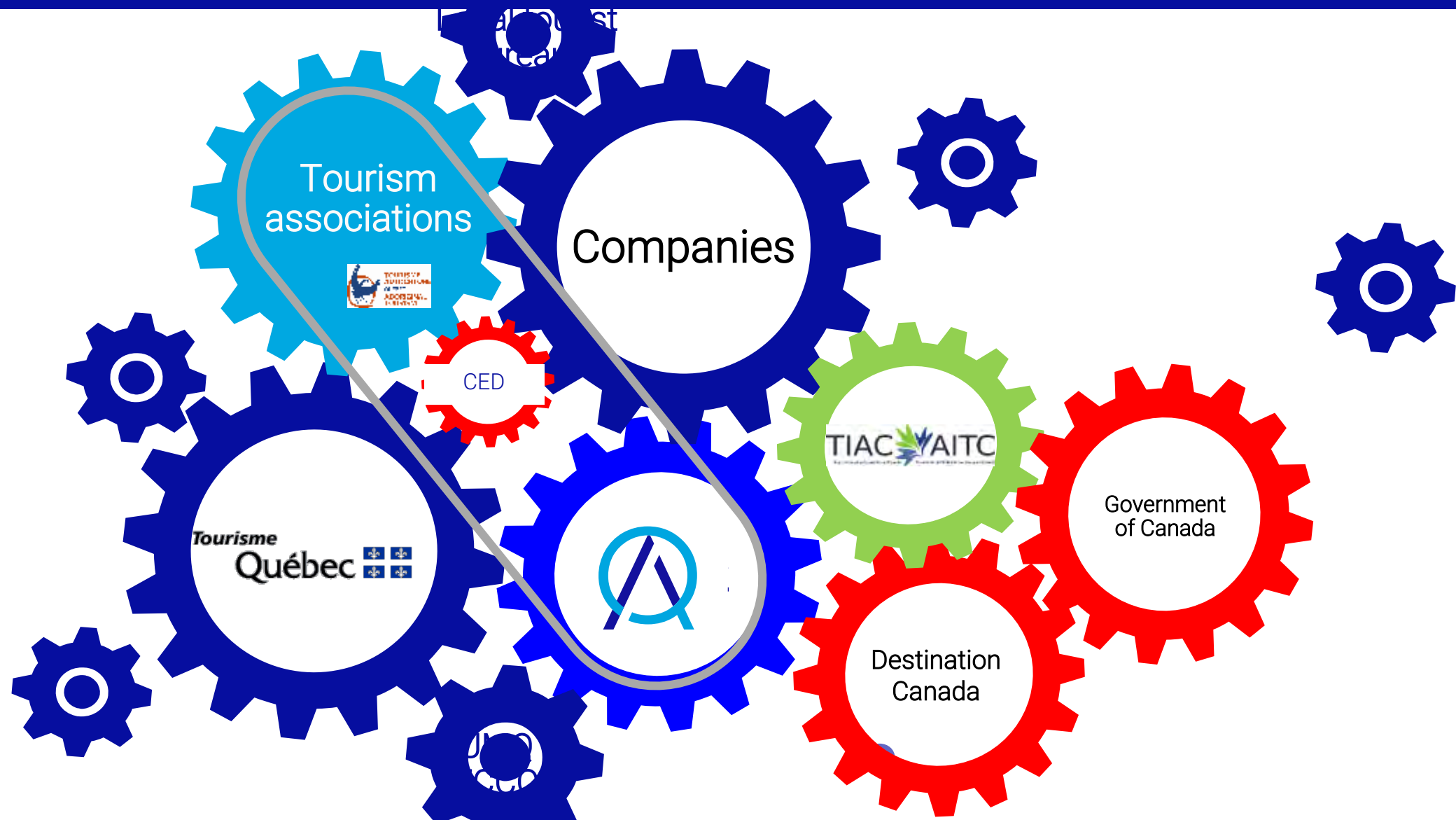
Partner agent of the Quebec government

- Promotion outside of Quebec
- Tourism signage
- Human resources measures
- Hospitality commitments

Collaboration and evolution

The industry's best interests
+
A firm commitment to
process evolution

SYNERGY WITH THE TOURISM ECOSYSTEM



A COLLECTIVE AMBITION TO...

MAKE QUEBEC

A

WORLD-CLASS

TOURISM DESTINATION



québec
original

**« If your dreams do not scare you,
they are not big enough. »**



3 | Challenges and strategic approach



Questions

- How does the Alliance market Indigenous tourism?
- How does the Alliance work with QAT ?
- What is the role of Alliance in product development?
- Who decides what to market from Indigenous Quebec?

A top-down view of various travel-related items arranged on a light-colored wooden surface. In the top left is a black DSLR camera with a lens. To its right is a brown leather wallet. In the top right is a yellow spiral-bound notebook. In the bottom left is a black leather wallet with orange stitching, containing a US \$100 bill. In the bottom center is a dark blue passport with the word 'PASSPORT' in gold letters, next to a pair of white earbuds. In the bottom right is a black smartphone. A white logo is visible in the bottom right corner.

Evolving traveller expectations...





Experienced

Exacting, wants life made simple,
open to the world



A setting for self

Personal quest and transformation





Digitally connected

Inspiration and interaction
every step of the way



A man with curly hair and sunglasses, wearing a blue and white striped polo shirt and khaki pants, stands smiling in front of a large wooden wing sculpture. The wings are mounted on two dark vertical posts. The background is a clear blue sky with a body of water and a forested shoreline visible in the distance. The text "Customized to the nth degree" is overlaid in white, with "Customized" on the top line and "to the nth degree" on the bottom line.

Customized
to the nth degree





Fierce competition



A low-angle photograph of the Eiffel Tower in Paris, France. The tower is the central focus, rising from a green lawn towards a clear blue sky. To the right, a row of trees with vibrant autumn foliage in shades of yellow and orange stretches across the frame. In the background, through the tower's arches, other Parisian buildings are visible. The overall scene is bright and clear, suggesting a sunny day.

What steps do high-performing destinations take to succeed?




They invest in...

Tourist
experiences

Access

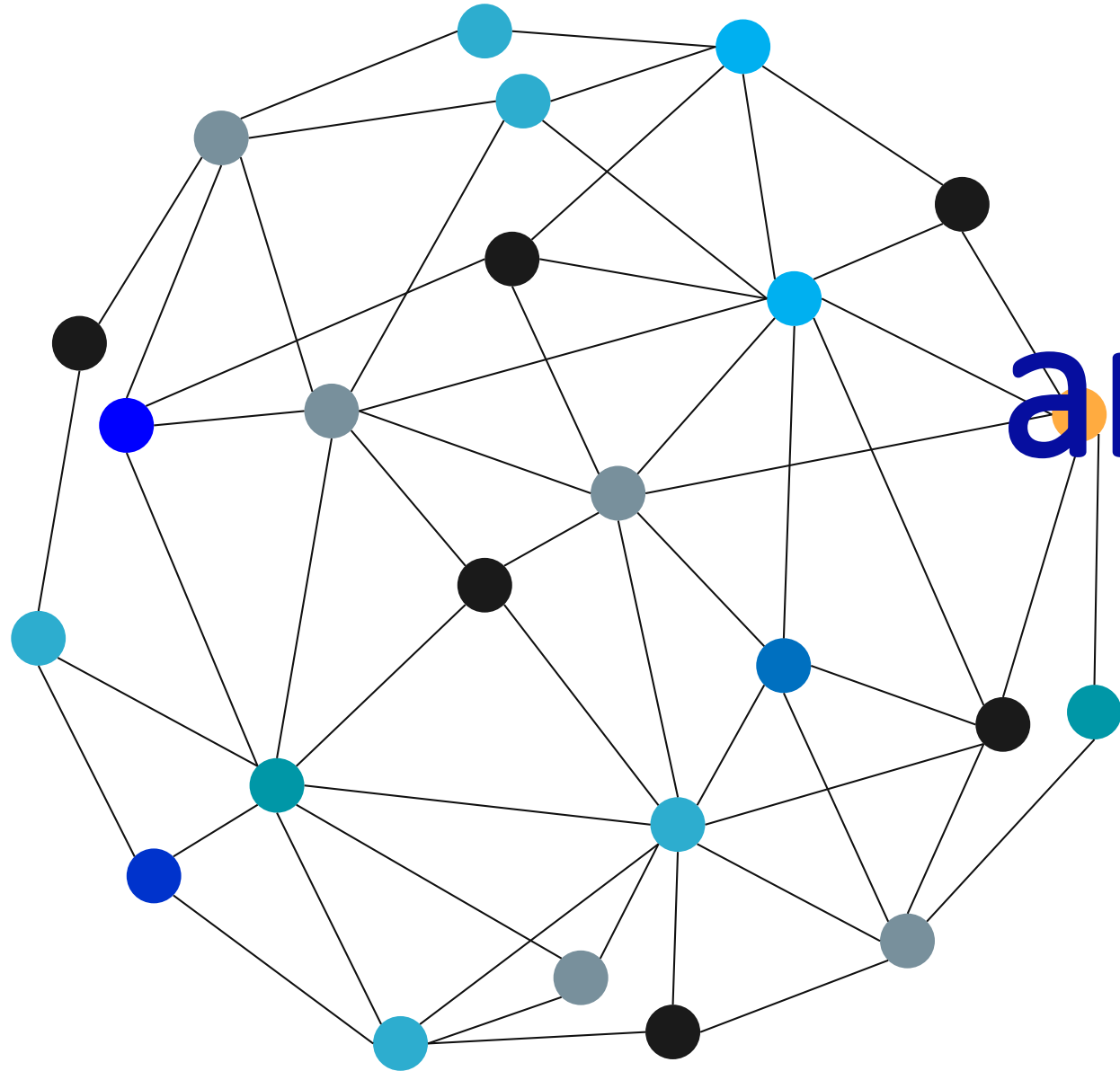
Marketing
initiatives



A vintage globe on a stand is the central focus of the image. The globe is mounted on a dark, ornate metal stand. The map on the globe is colorful, showing continents in shades of yellow, green, and brown, and oceans in blue. The background is a blurred interior space, possibly a library or study, with bookshelves and a window. The entire image has a strong blue color cast. Overlaid on the globe is the text "Now more than ever, strong performance will happen when we..." in a white, sans-serif font.

Now more than ever, strong performance will happen when we....





Stay united
and "in sync"

Evolve

Focus

Target results

10M

Grow the number of travellers from outside Quebec

+5%
yearly

Grow tourism revenues

+1%
yearly

Increase hotel stays – number and duration



Spur repeat business and positive recommendations

A network diagram with five nodes connected by thin black lines. The nodes are arranged in a pentagonal pattern. The top node is light blue, the top-right node is black, the bottom-right node is teal, the bottom node is light blue, and the bottom-left node is black. The text "Build, renew and develop our strengths!" is centered in the middle of the diagram in a bold blue font.

**Build, renew and
develop our strengths!**



Gateways
and strategic points of contact



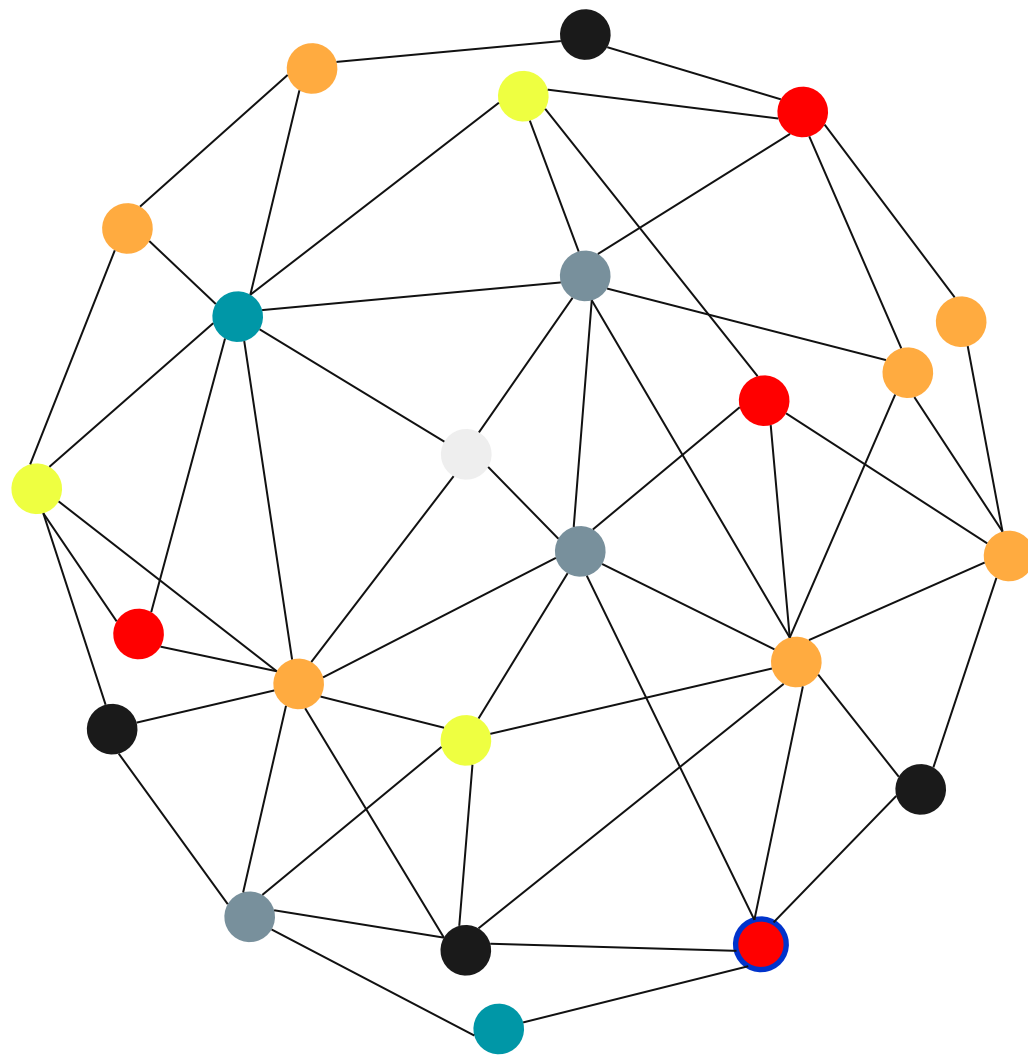
14 iconic Quebec
experiences



Ensure partner synergy and
consistency | content creation



Deliver on the destination
brand promise together



québec
original

From vision to results



4 | Partnership and Marketing Approach



WIN THE
TRAVELLER'S
HEART

BY KEEPING THEIR
BEST INTERESTS
AT HEART





**Inspire the
traveller
throughout the
process**



Maintain a presence

every step of the way with a consistent brand message that provides continuity from the invitation to the experience to sharing once they're back in their homes



A collective destination brand





québec
original

Openness, creativity, intensity

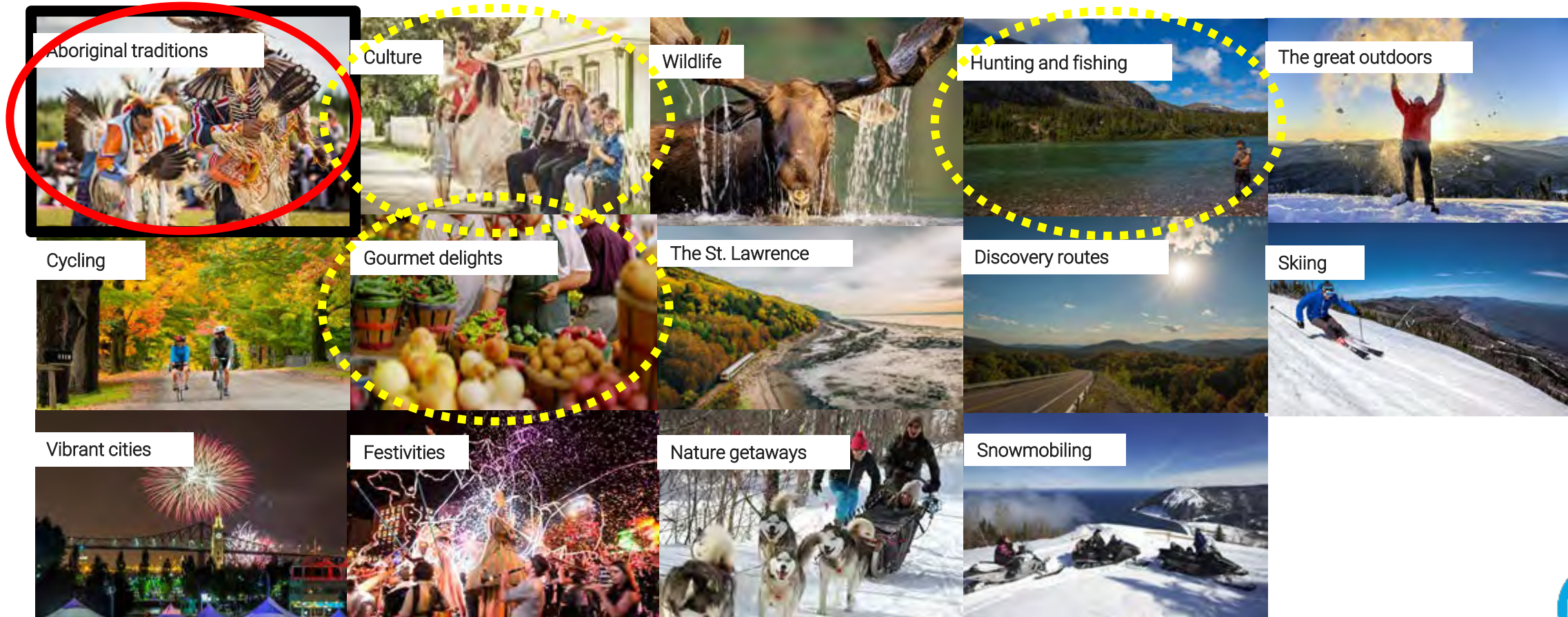
**Quebec is memorable
for the impression it
leaves.**



**A destination
brand
supported by
3 pillars**

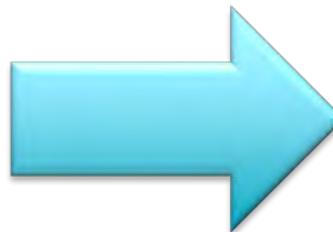


And the 14 experiences on offer in Quebec



A territory-wide relationship

québec
original



Strategic directions



Adopt an omni-channel strategy



- Combine content, technology and data
- Make informed decisions and prioritize actions based on ROI
- Opt for transparency in data sharing



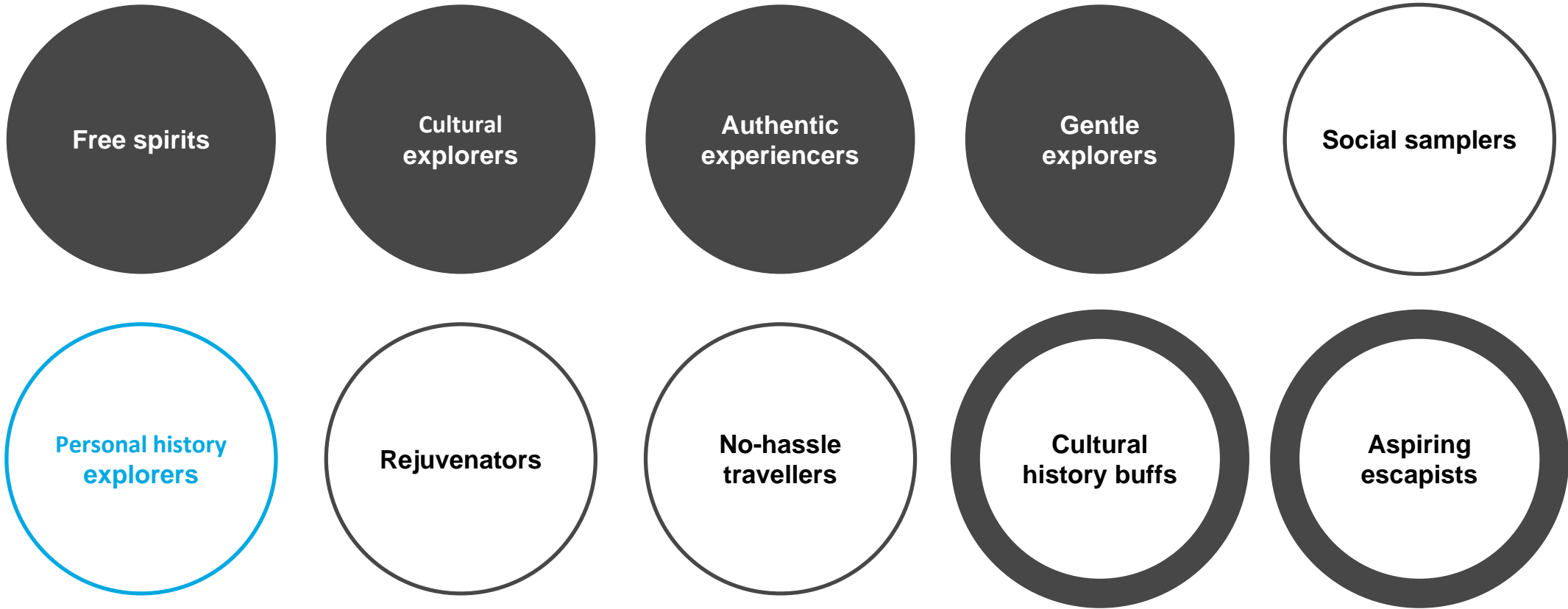
Move beyond markets to target profiles



- Optimize the relevance of actions in the various target markets.
- Identify, understand and target traveller profiles with the most potential.



TARGET PROFILES



Target markets

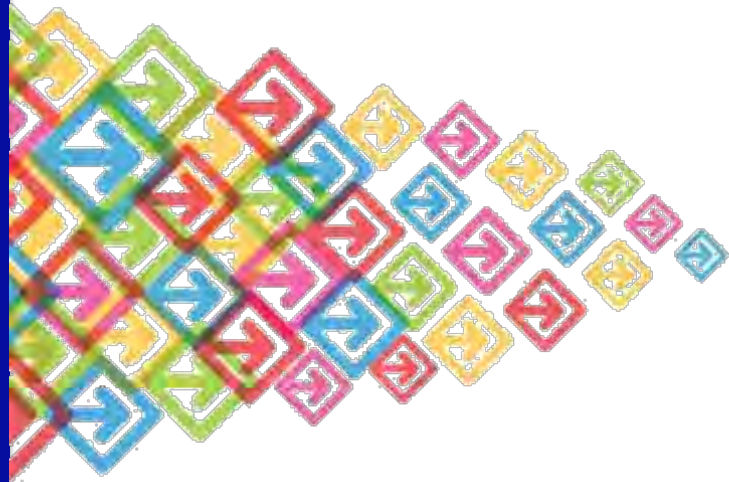


- Priority
- Secondary
- Emerging



3

Maintain a continuous brand presence



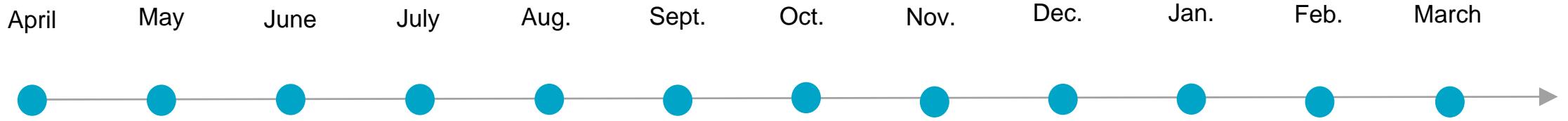
- Relevant to every stage of the traveller's experience.
- Create ongoing value in B2C, B2B and B2M.
- Diversify content creators so brand outreach can attain its full potential.



FROM A CAMPAIGN-BASED APPROACH...



... TO A CONTINUOUS BROADCAST APPROACH



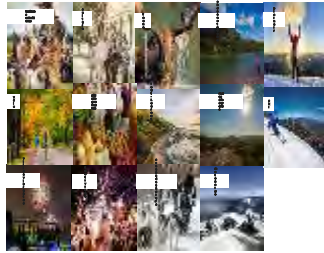
Continuous strategy - owned media - social networking platforms and QO website

Continuous strategy - paid media - social + banners + audience sharing

Continuous strategy - paid media - SEM



A SUMMARY OF OUR MARKETING APPROACH



→ B2M

→ B2B

→ B2C



GROUP DESTINATION
BRAND

14
EXPERIENCES

PROFILES

MARKETS

OPTIMIZATION
Coordination/
Alignment

Content creation

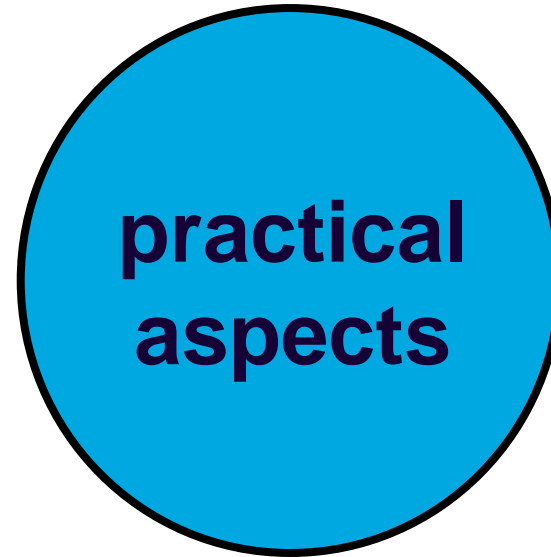
Content co-creation



Combine...



+



content and concept

context and tangible

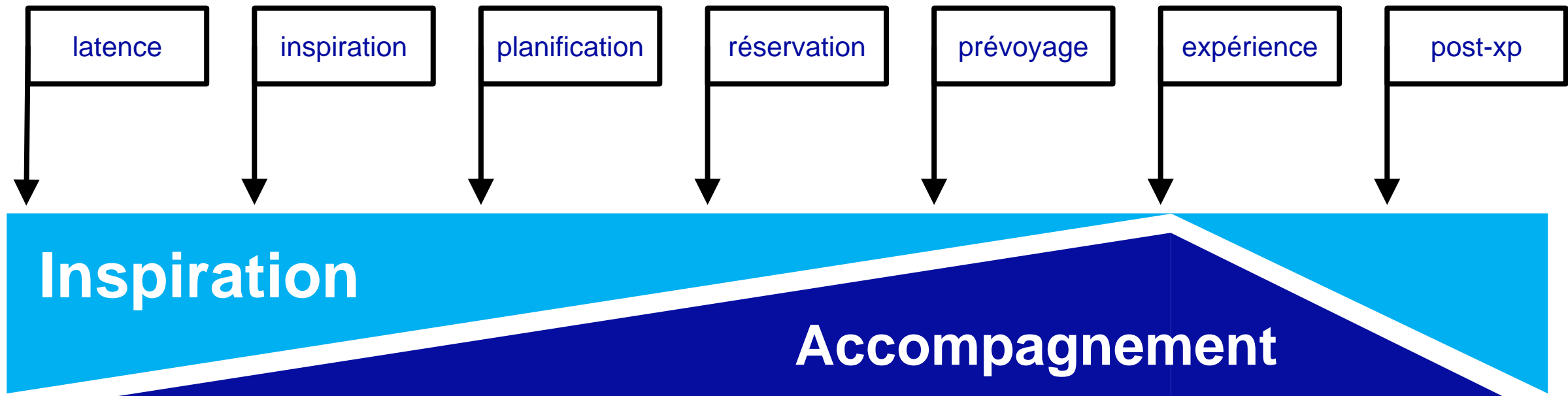
Everywhere, every time... and relevant

4



TO INSPIRE TRAVELLERS AND BE THERE FOR THEM

All through the process



5

Integrated communications



- Through all QuébecOriginal channels: B2C, B2B or B2M.
- Optimization of efforts and resources will benefit all industry stakeholders.





let
go



Our promise

Quebec is intense,
with a unique culture,
where I can reconnect
with raw, pure sensations

The traveller's best
interests at
HEART



Our message

Because our experiences are more intense, Québec makes a deeper impact on travellers...

And leaves a lasting impression



LE HÉROS, C'EST
LE QUÉBEC





The strategic idea

Experiences: more impact than places.

Memories: even more impact than experiences.

***QuébecOriginal creates
“hyper-memories”***

cossette

Content ecosystem

Concept

- A creative platform for speaking to all global marketing with a **single unified voice**
- Over a period extending **beyond a single campaign**
- To be used as a guide for all our **communication channels: consumers, distribution network and media**



québec
original

Partnership | approach

13 juin 2018



Opportunities

COMPLEMENTING QuébecOriginal initiatives

EX: Retargeting qualified audiences using the partner's content

RELEVANT to the tourism industry

EX: Contribution to an initiative surrounding Air Canada's Shanghai-Montreal flight

CUSTOMIZED Developed with a partner

EX: Presence of most relevant partner at a business activity in a specific market

Content produced in partnership, for use by Québec Original and partners

PRESS TOURS With tourism associations, for businesses

Policy of cost assumption and cost sharing

01

02

03

04

9 collaborative working groups

Cross-sector experiences

→ Vibrant cities

1

→ Culture

→ Festivities

→ The great outdoors

2

→ Nature getaways

→ Wildlife

→ Discovery routes

→ The St. Lawrence

3

→ Gourmet delights

4

→ Aboriginal traditions

5

Niche experiences

→ Skiing

6

→ Snowmobiling

7

→ Cycling

8

→ Hunting and fishing

9



traditions autochtones · québec original · indigenous traditions



Why create traveller experience committees? **Québec original**



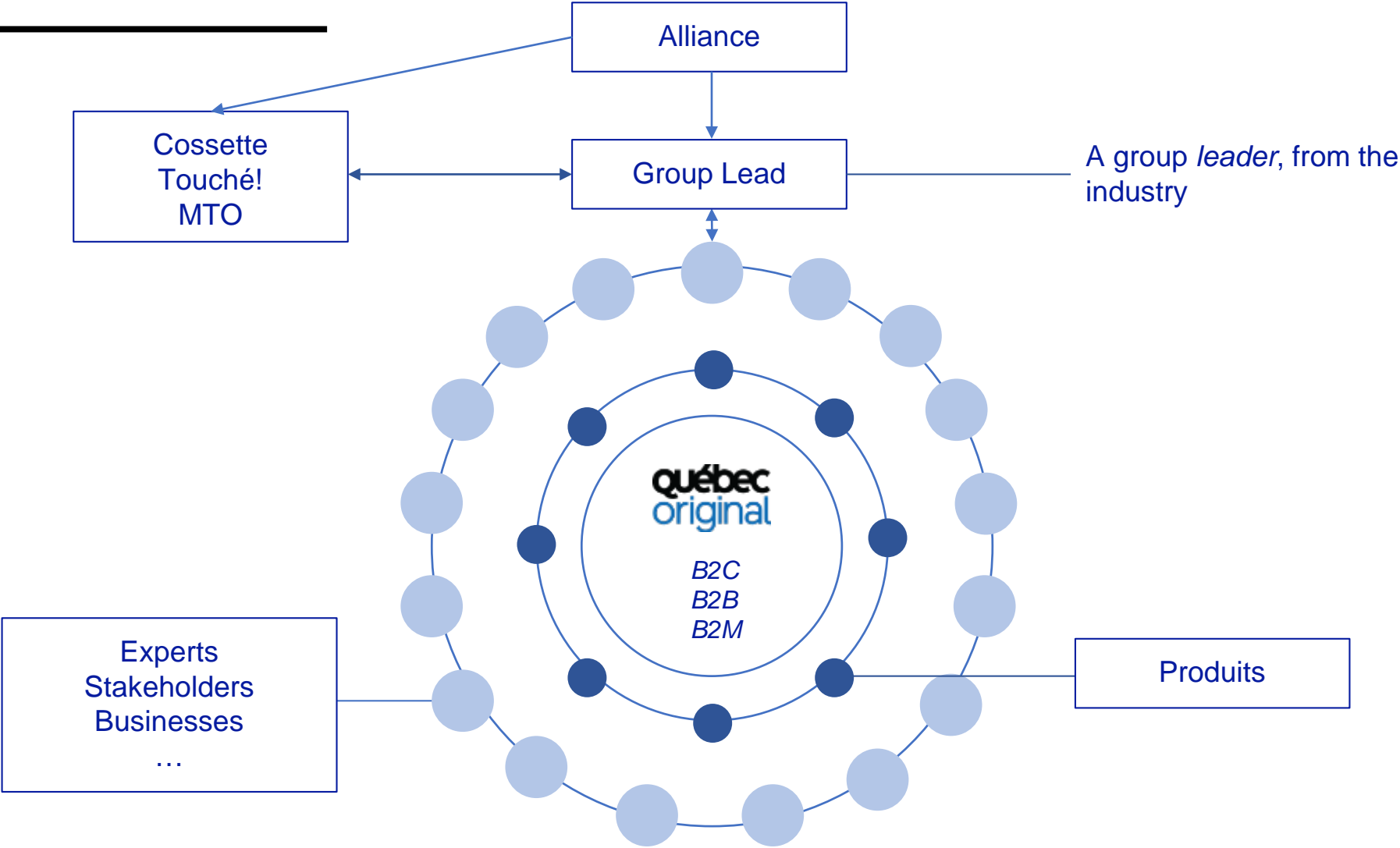
- To contribute to strategic thinking for the QuébecOriginal brand, through the experiences offered
- To provide expertise to help develop action plans for each experience
 - Product expertise (e.g., affirmation of alluring, unique products)
 - Marketing expertise
 - Content development
 - B2C activities
 - Sales activities
 - Press relations and identifying influencers
- To allocate \$\$ to help get the word out about Quebec experiences, and to set up action plans in our key markets

Rules of the game

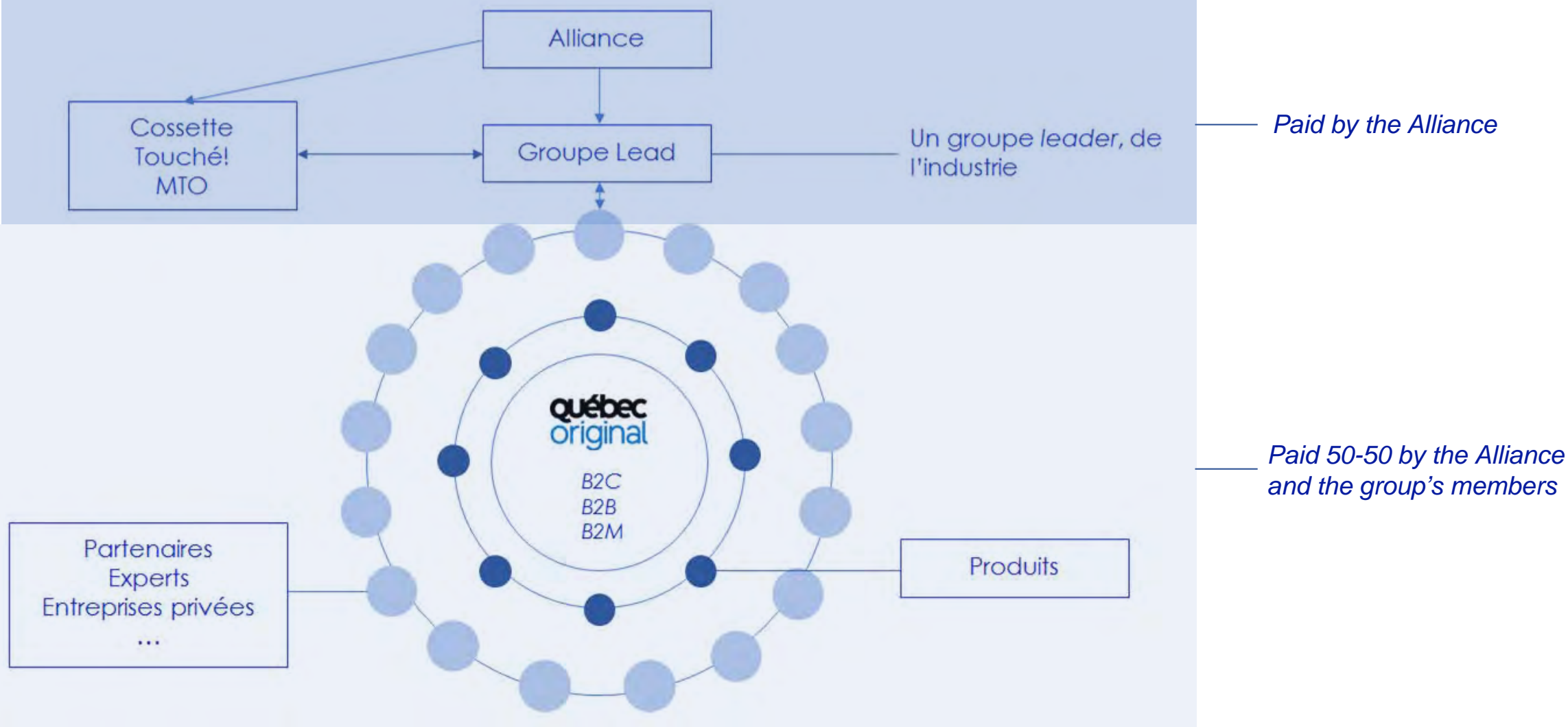
- The QuébecOriginal brand will be the vehicle for – and must fuel – Quebec experiences
- Create synergies among the various experiences
- The Alliance is the lead for introducing these experiences into the QuébecOriginal brand ecosystem
 - QO website and “group” websites
 - Social networking platforms
 - Media communications campaigns
 - Sales activities
 - Press relations



gouvernance des comités



Committee governance



Working groups – financial model



Paid out of regular Alliance budget

- Costs for group lead
- Alliance team – marketing
- Agency costs (team from two agencies working for the Alliance)
 - Strategy
 - Ideation
 - Media planning
 - Coordination



Paid out of collaborative working group's budget

- Costs for creating and producing material
- Media placement (net)
- Costs for required press tours
- Costs for trade shows, fairs or other mandatory events
- Meeting costs for management of working group

100%



- *Alliance annual budget (from the \$23M)*

50%



- *Alliance annual budget (from the \$23M)*

50%



- *CED investments through tourism associations*
- *Regional tourism association investments through accommodation tax*
- *Company investments, directly and/or through tourism associations*

What about businesses?

Deliver the experience and
train human capital

01



Invest/Innovate

03



02 Add value and embody
the destination brand
promise

02



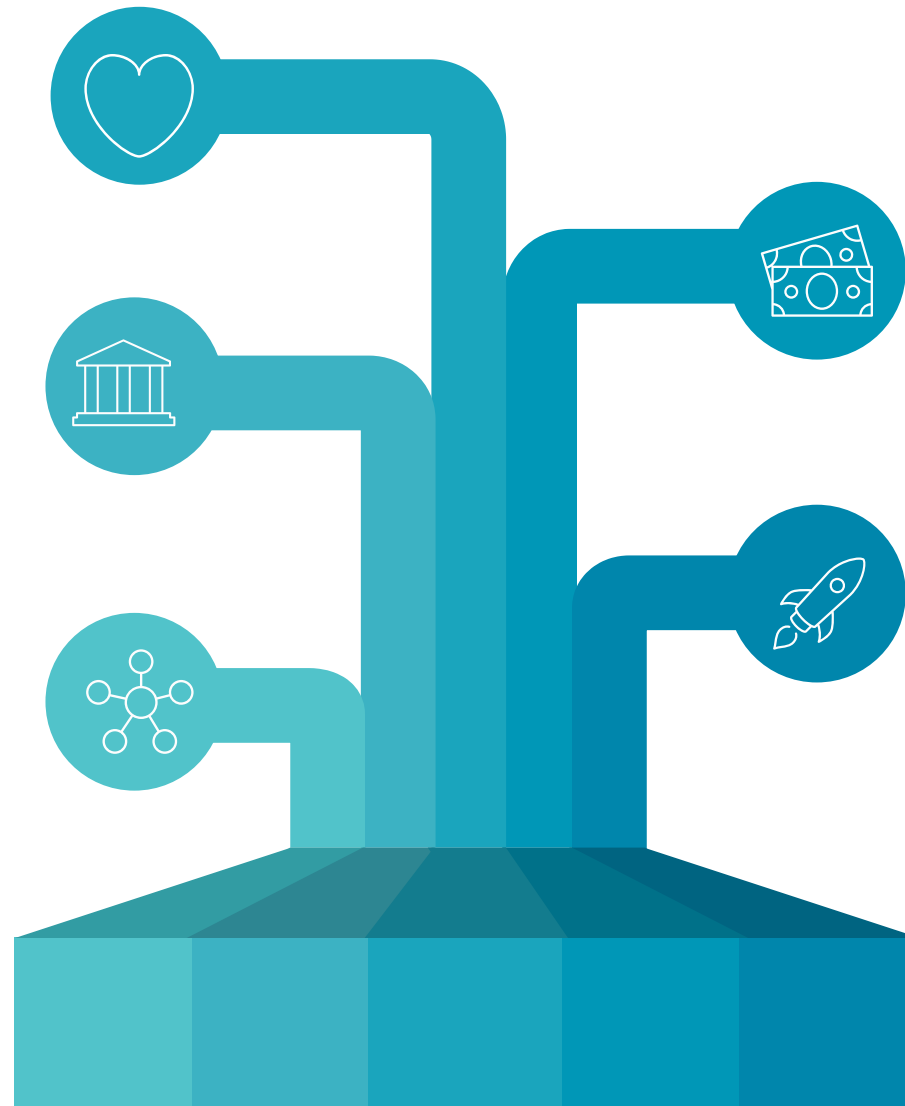
04 Provide content/invest
in AT promotion

04



Potential connection to the
digital ecosystem

05



En résumé

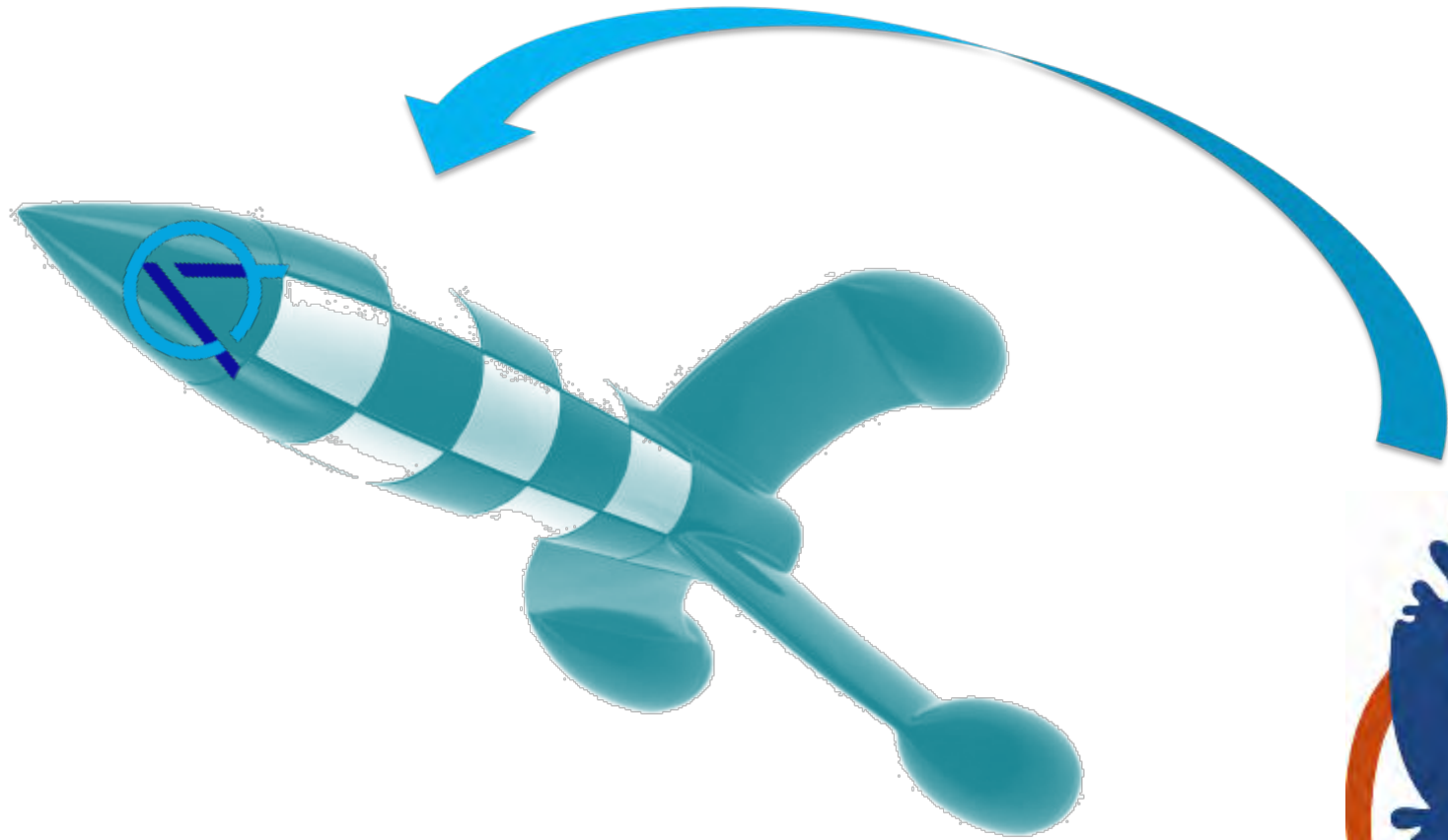
- How does the Alliance market Indigenous tourism?
 - ◆ Dans la marque QCO
 - ◆ Via les 14 experiences

- How does the Alliance work with QAT
 - ◆ Lead de l'expérience tradition autochone
 - ◆ Co-investissement

- What is the role of Alliance in product development?
 - ◆ Rôle de Tourisme Québec : Alliance en influence avec TAQ

- Who decides what to market from Indigenous Quebec?
 - ◆ TAQ : le spécialiste

QAT injects expertise into a high-performing group marketing vehicle





ALLIANCE DE L'INDUSTRIE
TOURISTIQUE DU QUÉBEC

A partner in the success
of Quebec's tourism industry