2000-2005 TOURISM MARKETING STRATEGY

Québec

Tourisme
Québec

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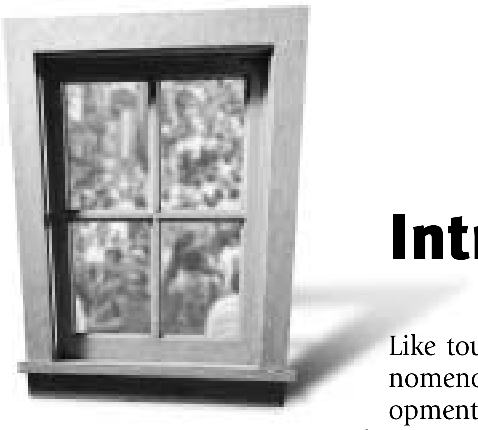


Introduction

Like tourism elsewhere in the world, tourism in Québec is growing. This phenomenon is leading to a growing number of players and opportunities for development. The combined effect of this growth in a changing and competitive environment calls for a revitalization of Québec's tourism marketing strategy.

Tourisme Québec and industry partners joined forces to develop the 2000-2005 tourism marketing strategy. A working party formed of members of the *Forum permanent de l'industrie touristique* participated in strategy orientation and validation. Likewise, extensive consultation midway through resulted in over one hundred industry participants validating and improving on findings and policy targeting different products and markets.

2000-2005 Tourism Marketing Strategy is a policy paper aimed at Tourisme Québec and its partners.

- It describes the marketing challenges facing Québec as a destination.
- It advocates a global marketing approach by all public and private partners.

This paper presents highlights of Québec's performance over the last decade as well as lines of intervention and strategic choices.

Analyses and detailed commentaries concerning major trends and market and product performance are outlined in seven booklets entitled:

- *Grandes tendances de la demande touristique* (Major Trends in Tourism Demand)
- *Performance de la destination québécoise* (The Performance of Québec as a Destination)
- *Marché québécois* (The Québec Market)
- *Marché de l'Ontario et des autres provinces canadiennes* (The Market in Ontario and Other Provinces of Canada)
- *Marché américain* (The American Market)
- *Marches des autres pays que les États-Unis* (Markets of Countries Excluding the United States)
- *Tourisme d'affaires et de congrès* (Meetings, Conventions and Incentive Travel (MCIT)

In order better to meet the expectations of Québec's tourism decision-makers, special emphasis was placed on improving the analysis presented in the 2000-2005 marketing strategy. Therefore, whenever possible, strategy assessments differentiate between…

- geographical sub-markets (for example: states in the USA, the Province of Ontario, some foreign countries) and
- the purpose of travel, with emphasis on leisure tourists, the main clientele targeted by promotional efforts sponsored by Tourisme Québec and its partners, and business tourism (meetings, conventions and incentive travel).

Strategic Diagnosis

The first strategic marketing plan tabled in 1989 gave substance to the determination of Tourisme Québec and the tourism industry to coordinate action and improve the return on promotional investment. This approach, deemed innovative at the time, introduced the concept of tourist products and defined priority markets. The second strategic plan implemented in 1993 follows in the wake of the first, differing, however, in the dual objective of improved sales of the destination on primary markets through package deals and heightened efforts on foreign markets.

Before drafting a new marketing strategy, three questions required answers:

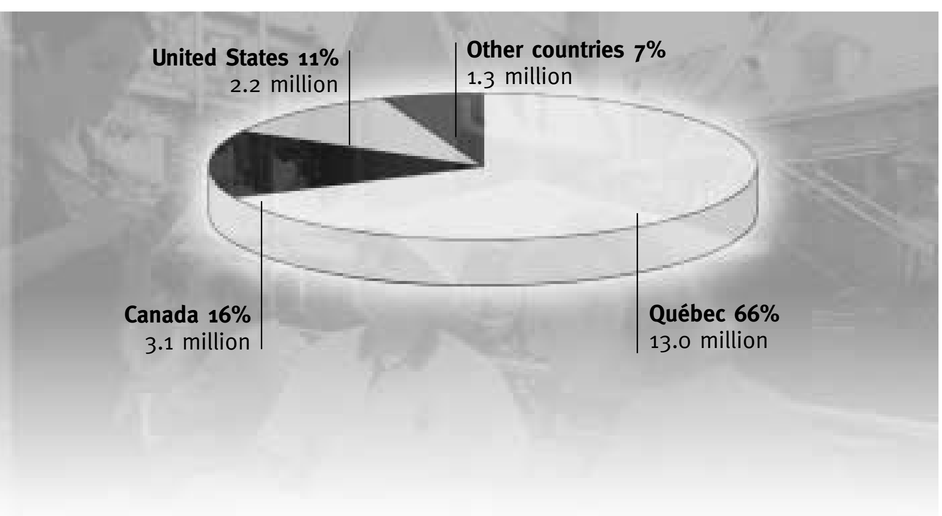
- Where does the Québec tourism industry stand?
- What could be learned from the strategies deployed between 1993 and 1999?
- Which trends should be integrated into the new marketing strategy (2000-2005)?

1.1 Statistical Portrait

A clientele mainly from Québec

Two-thirds of tourists travelling in Québec reside in Québec. This clientele is of the utmost importance to the tourism industry, particularly in regions located outside of Montréal and Québec City.

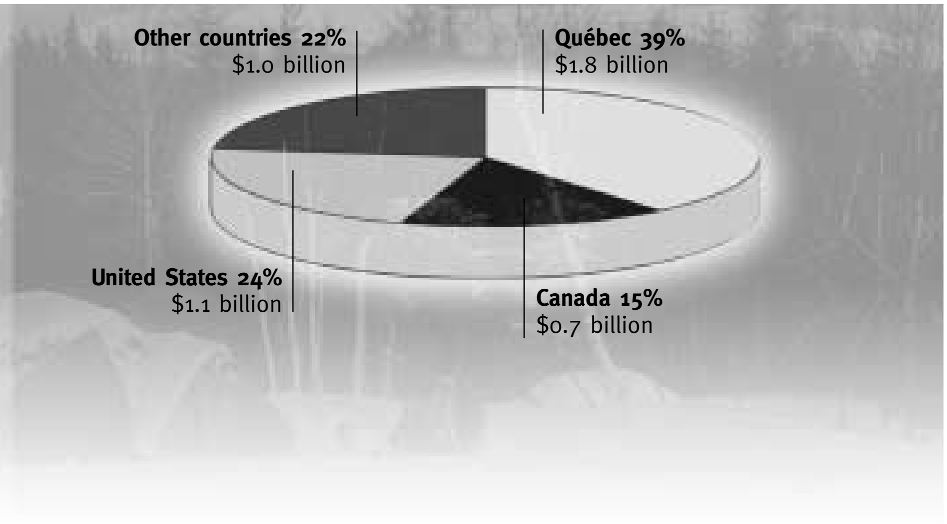
Origin of 19.6 million trips in 1999
Total province-visits, all travel purposes combined



Economic spin-offs attributable largely to client groups outside Québec

In 1999 more than 60% of tourist expenditures in Québec originated from client groups outside Québec. In addition, half the jobs created were attributable to the presence of international tourists, increasingly responsible for fuelling industry growth.

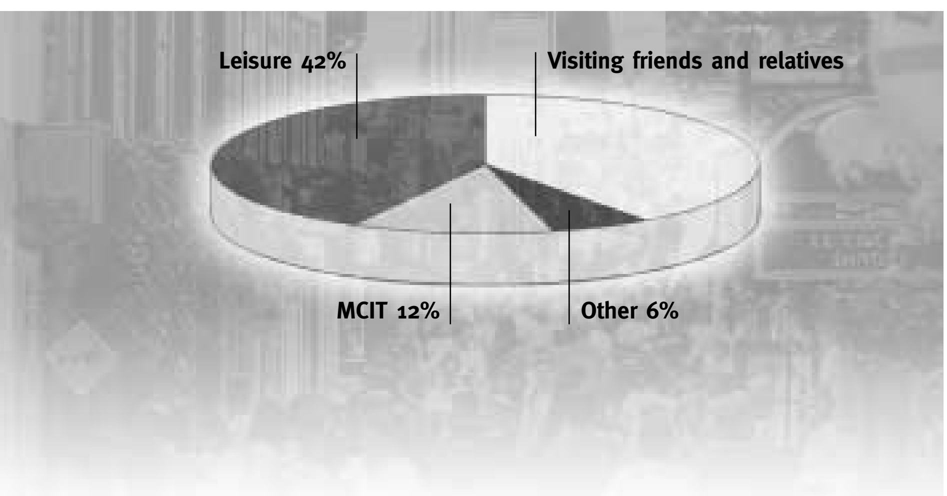
Origin of $4.6 billion in tourism revenue in 1999
All travel purposes combined



Leisure travellers and meeting, convention and incentive travel (MCIT) clientele account for 75% of all revenue

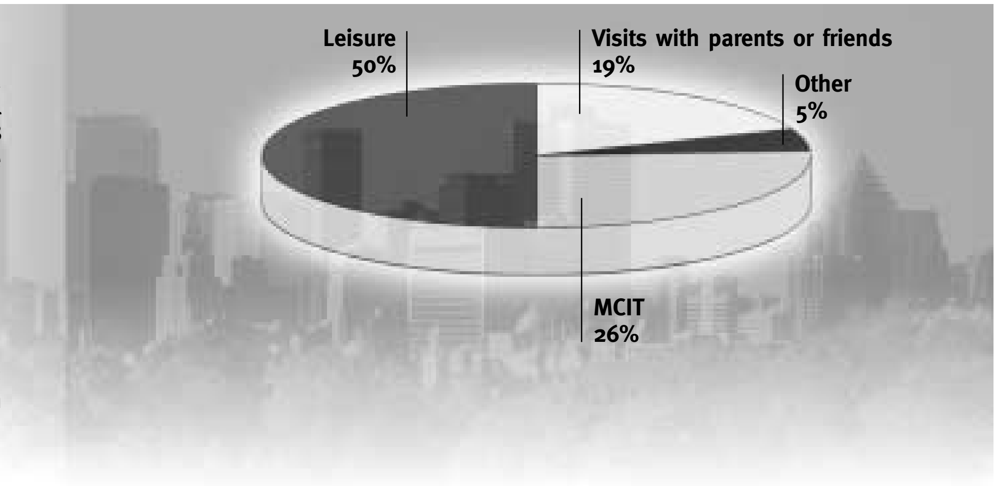
Although leisure travellers rank first, MCIT clientele are far from negligible. While MCIT clients account for only 12% of the tourist clientele, they are responsible for over 25% of the revenue generated. MCIT tourism is very lucrative, irrespective of the market of origin.

Volume of tourists based on the purpose of travel in 1998
percentage



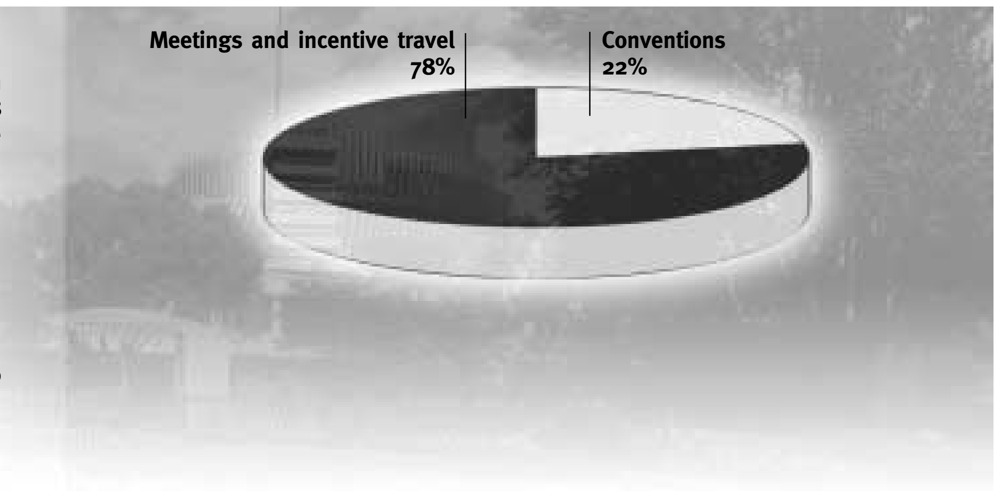
Total province-visits: 18,781,000

Tourism revenue based on the purpose of travel in 1998
percentage



Total revenue:
$4,291 million

MCIT distribution in 1998
percentage

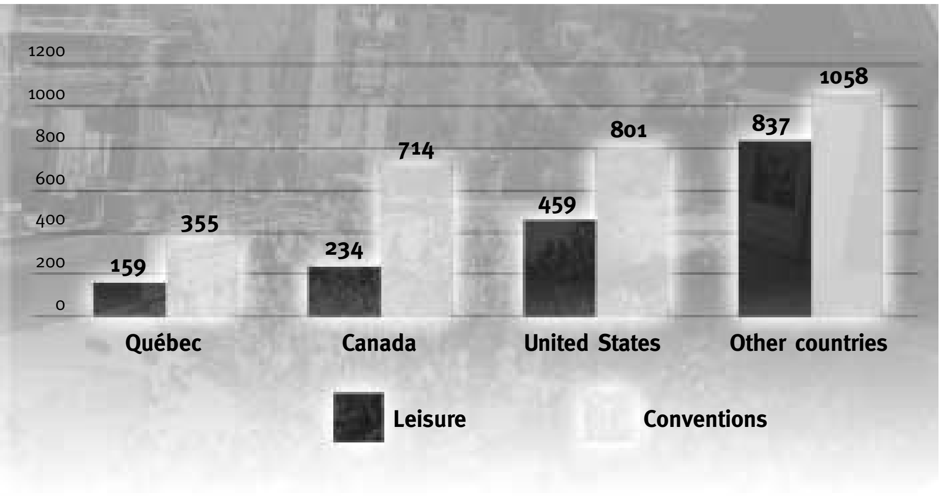


Total province-visits:
2,276,400

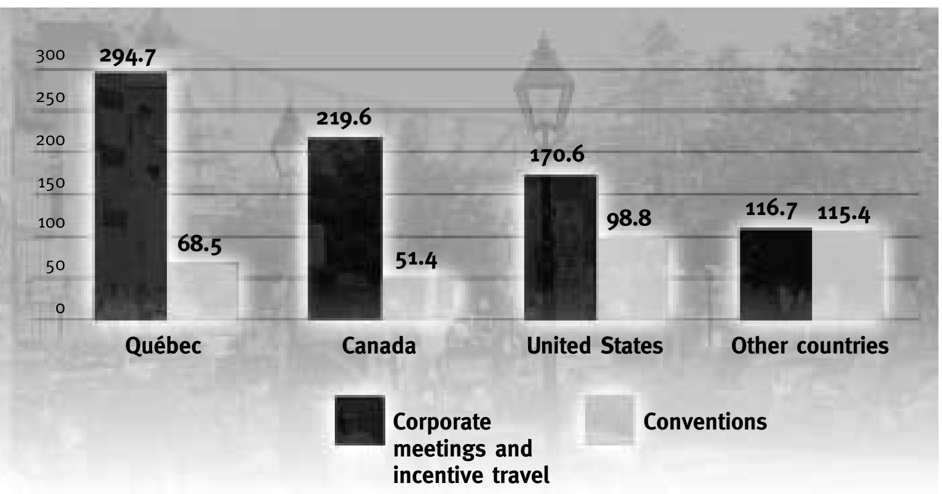
Convention clientele: basically an international clientele

Two thirds of convention revenue is generated by foreign markets, in comparison to 36% attributable to corporate meetings and incentive travel. Meetings and incentive travel account for 2.4 times more economic spin-offs than convention tourism. Likewise, revenue is comparable in the case of international client groups.

Average expenditures per sojourn, based on market of origin and purpose of travel in 1998



Expenses of MCIT client groups based on market of origin in 1998
in millions of dollars



1.2 Market Evolution 1993-1999

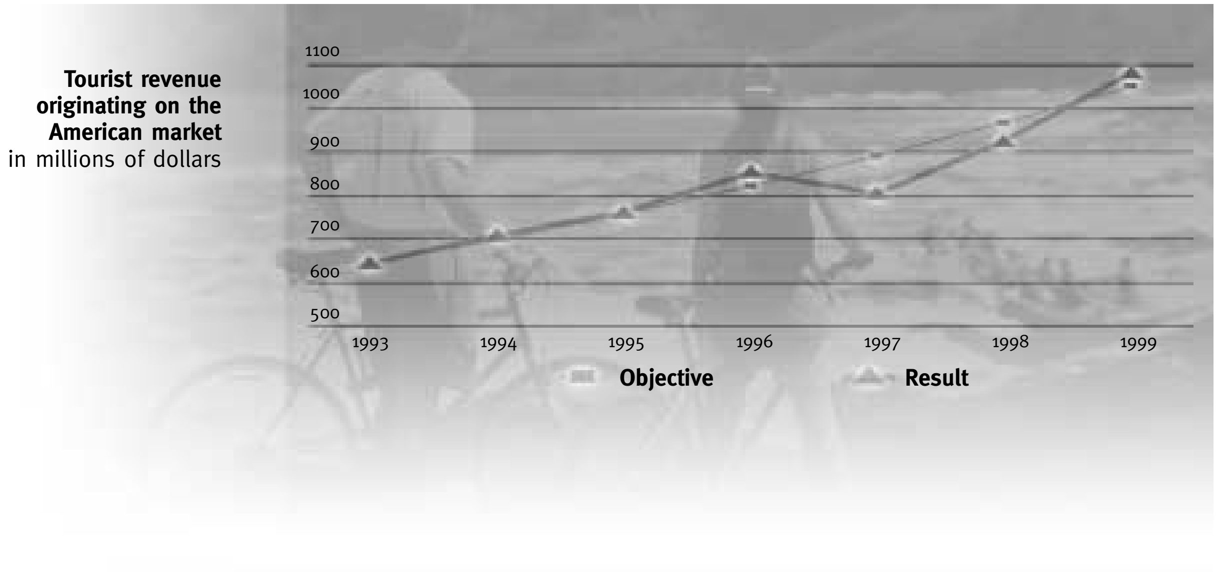
Québec and Canadian markets

Without being able to rely on the pattern study of the 1994-1996 Canadian Travel Survey (CTS), it is hard to determine whether goals for domestic market development in 1993 were achieved. On the other hand, recent CTS results for 1997 to 1999, combined with an increase in room occupancy in hotels, indicate that domestic tourism increased significantly.

The American market

Thanks to a substantial increase in revenue on the American market in 1998 and 1999, the results obtained for this market have proven interesting. Likewise, to a certain extent, over the seven-year period surveyed, projected annual increases in revenue were surpassed moderately.

Despite this, Québec's share of the American market in 1998 (11.3% of total province-visits) remained stable in relation to that of Canada as a whole.



Progression on the American market from 1993 to 1999

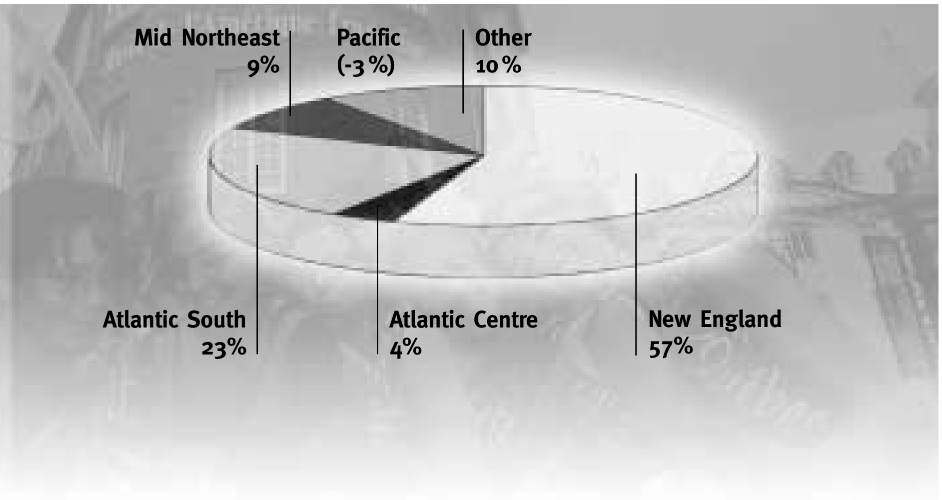
In 1999 Québec welcomed 451,000 more American tourists than in 1993. This increase is largely the result of the following.

- A huge increase in the MCIT clientele (42% in volume from 1993 to 1998) possibly brought about by NAFTA; Québec's market share in Canada (17.9%) increased by 1.5 points;
- A promising upsurge in leisure travel in winter; increased investment by Tourisme Québec in its winter advertising campaign have proven encouraging;
- The revival of leisure tourism: results for 1999 indicate an 11% increase in the volume of province-visits.

Origin of growth from 1993 to 1998

- New England was responsible for 57% of the growth, which is far from reassuring for the future, owing to the small size of this sub-market and its already considerable importance to Québec.
- The dynamism of Atlantic South (23% of the growth) is very promising, to say the least.
- However, results obtained in Atlantic Centre are disappointing in light of regional demography.

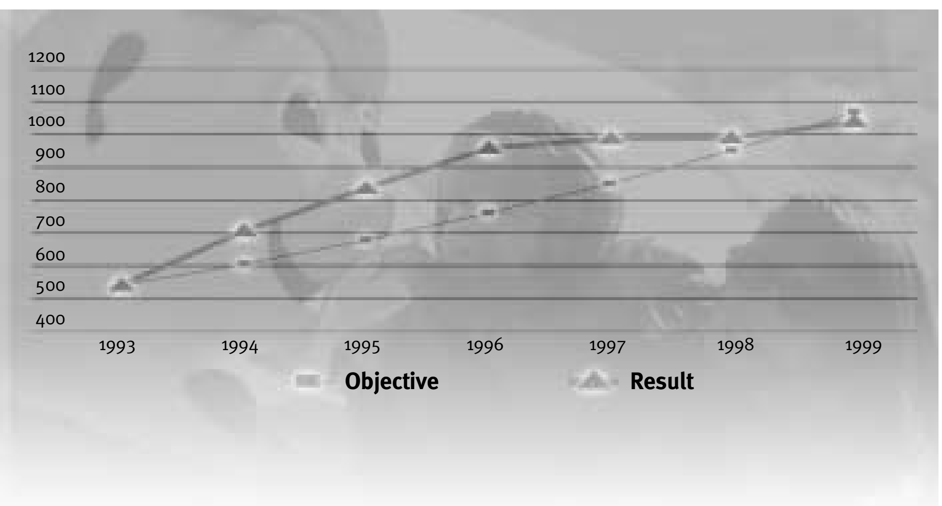
Origin of the additional 451,000 tourists (compared to 1993)
province-visits,
all purposes of travel



Other foreign markets

After rising sharply from 1993 to 1996, growth of client groups on other foreign markets experienced a sizeable downswing. However, the annual growth rate for revenue established in 1993 (12%) was achieved.

Tourist revenue from countries other than the United States
in millions of dollars



Québec's share of the market in Canada as a whole increased 1.7 points between 1993 and 1998, whereas Ontario's share decreased 3.1 points over the same period.

Progression of other foreign markets from 1993 to 1999

Between 1993 and 1999 Québec welcomed 432,000 more tourists from other foreign markets.

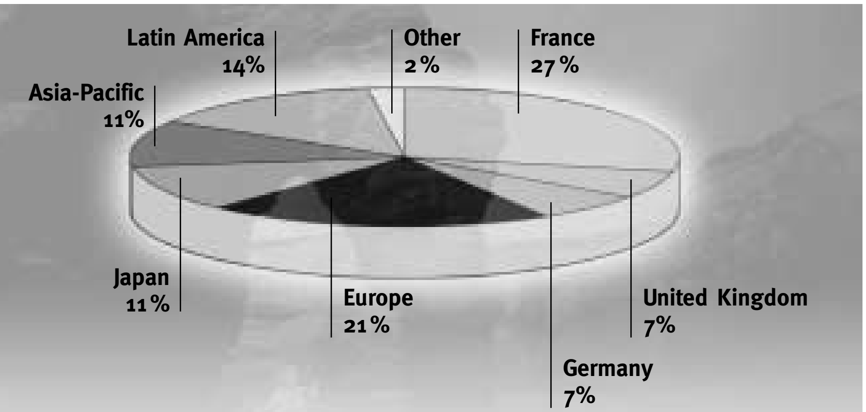
Market progression is characterized by three attributes.

- Very strong growth of MCIT between 1993 and 1998: 54% for Europe and 150% for the Asia-Pacific region. Québec outdid other rival provinces. Its market share in Canada, which was 27.2%, improved by 6.6 points, while the shares of Ontario and British Columbia dropped 1.4 and 2.4 points respectively.
- Excellent results for leisure tourism: 35% for Europe and 23% for the Asia-Pacific region, clearly outdoing the performance of the American market.
- A sizable breakthrough in winter tourism. All travel purposes taken together, winter tourism increased by 60% between 1993 and 1998, with France leading the way with an increase of 84%.

Origin of growth between 1993 and 1998

Québec has diversified its foreign markets since 1993. Between 1993 and 1998, the increase in the number of tourists from the United Kingdom, Germany and Japan matched that of French tourists.

Origin of the additional 432,000 tourists (compared to 1993)
province-visits, all purposes of travel



1.3 Marketing Strategies Reviewed

The 1993 marketing strategy was based on two main premises:

- focusing promotional efforts on market-based competitive products;
- fostering greater cooperation between partners and pooling resources to focus on sales targeting primary markets and the positioning of secondary and tertiary markets.

The emergence of new phenomena such as…

- increased client segmentation
- introduction of new products
- entry of the Internet

influenced marketing approaches, which were refined, as demonstrated by strategies deployed in recent years on different markets.

The Québec market

The report on promotional activities for the Québec market is extremely encouraging for the following reasons:

- the significant contribution of non-traditional partners (oil companies in particular);
- tighter integration of advertising campaigns sponsored by Tourisme Québec and regional tourism associations, especially since 1999;
- an increase in the supply of package deals offered by partners (*Société québécoise des fêtes et festivals, CAA Québec*, etc.);
- emphasis placed on promoting winter tourism;
- further development of the English-speaking market;

The visibility of different lead-in products requires improvement, while marketing efforts continue primarily to target promotion of tourist regions.

The Canadian and American markets

To date, strategies implemented on the Canadian market mirror those of the American market. The report that follows concerns primarily the American market and considers the range of promotional efforts deployed to reach the market.

In terms of partnership, the following points deserve mention:

- extension of strategic alliances to non-traditional partners;
- success in the sale to industry of advertising in the package deal brochure;
- more advertising introduced since 1999 to promote winter tourism.

Means were reinforced, even refined:

- team of canvassers expanded to Chicago, Dallas and Los Angeles;
- network of travel agents established (Québec Specialists), specializing in the sale of Québec as a destination;
- more attention paid to individuals as a clientele;
- client targeting techniques serving to pinpoint clienteles offering the best potential;
- telemarketing team set up with responsibilities concerning MCIT clientele shared between the *Office des congrès et du tourisme du Grand Montréal*, the *Office du tourisme et de congrès de la Communauté urbaine de Québec*, the *Société du Palais des congrès de Montréal* and the *Société du centre des congrès de Québec*.

Weak points include:

- insufficient investment in the United States, considering Québec's low profile on this market and the presence of strong competition;
- unstable partnership with the Canadian Tourism Commission;
- lack of a strategy directly solely at the Ontario market;
- no assessment of the spin-offs generated by the package deal brochure. Although 80% of package deal advertisers deemed it excellent, insufficient information on sales makes assessment impractical.

Overseas markets

Highlights of promotional strategies of recent years may be summarized as follows:

- market expansion, thanks to growing industry interest in countries other than France; partnerships have multiplied, particularly with the Canadian Tourism Commission (CTC), other provinces, foreign tour operators and airlines;
- improved positioning; for example, Québec ranked first for information requested from the United Kingdom as a result of the last joint campaign with the CTC;
- more visibility for Québec products in deals offered by tour operators in France, the United Kingdom, Germany and Italy;
- success garnered on European and Japanese markets with products other than urban stays (resorts, snowmobiling, downhill skiing and tours, to name but a few);
- press relations benefiting Québec's image. Advertising value of coverage of Québec increased from $90 million in 1993 to $184 million in 1999.

To consolidate its position on these markets, Québec must continue to follow its initial course of action and address the following problems:

- in comparison to Ontario and British Columbia, both of which have a more diversified market, Québec is too dependant upon France;
- budgets are insufficient to position Québec distinctively on overseas markets;
- despite the low profile of the destination on overseas markets, too much promotional activity is carried out by individual players (for example, businesses, regional tourism associations, sectoral associations, etc.);
- airline flights present a challenge: the number of available seats during the high season is insufficient.

1.4 Survey of the Supply

The strategy implemented in 1993 for supply was based on a range of priority products. Progress observed has confirmed the pertinence of this choice.

Service infrastructures

In recent years Québec completed the infrastructures so essential to an international tourist destination and now offers:

- an extensive accommodation network;
- diversified means of transportation;
- integrated tourist signage;
- standardized classification of accommodation;
- accessible tourist information services.

Industry professionalism

The tourism industry has become more professional in its approach, evidenced by:

- the introduction of the notion of quality in several sectors;
- the extension of the tourist signage policy to tourist routes;
- the expansion of the Client Plus training program.

Products, activities and services

Available products and services have improved significantly.

- The international character of premium lead-in products such as urban stays, tour routes, MCIT tourism and resort stays has been confirmed by sizeable investments made by both public and private partners in the industry. One event of significance has been investment attributable to the arrival in Québec of major international investors in tourism activities.
- Other resource-based or activity-specific products are characterized by an international clientele, as in the case of snowmobiling, outdoor adventure, hunting and fishing products.
- There is more variety in accommodations offered (B&Bs) and in products and activities such as winter tourism, urban stays/escapades, Aboriginal tourism, bicycle touring and international cruises.
- The number of airline flights has increased somewhat. The transfer of international flights from Mirabel to Dorval has led to the establishment of new routes between Montréal and overseas markets.

Additional efforts will be required to sustain the destination's competitiveness in light of the competition, for example, international calibre attractions, luxury accommodation, quality road network, etc. The schedule of airline flights is the principal obstacle to the development of overseas markets. A lack of seats poses a problem in Europe, whereas the problem in the Asia-Pacific region concerns a lack of direct flights.

Moreover, the distinct character of Québec's products and services must be highlighted through the organization of an original presentation, based on well-organized themes in keeping with customer expectations.

1.5 Funding and Partnership

Financial investment

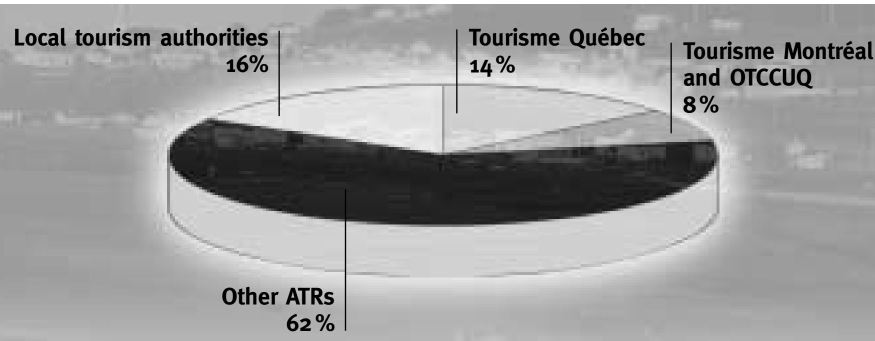
In 1998 some $52 million was invested in tourism promotion in Québec. This amount excludes investments made by tourism companies themselves and some sectoral associations.

Much like the international marketplace, promotional investment is distributed among a considerable number of partners, confirming their interest in tourism. The more than 80 private and institutional partners may be grouped into the following categories: 6 national, 20 regional and 57 local.

A little more than a third ($12.6 million) of funds invested by Tourisme Québec and its partners targeted the Québec market, while the remaining funds ($39.1 million) were allocated to foreign markets, particularly the United States.

Regional tourism associations (ATR) and local tourism authorities are among the leading players on the Québec market. The situation differs completely on foreign markets, where the shares of Tourisme Québec – 44% of investments – and those of *Tourisme Montréal* and the *Office du tourisme et des congrès de la Communauté urbaine de Québec* (OTCCUQ) – 38% of investments – dominate.

Distribution of promotional investment by institutions on the Québec market in 1998: $12.6 million



Distribution of promotional investment by institutions on foreign markets in 1998: $39.1 million

* Canadian Tourism Commission (CTC) investments considered here only concern contributions made to Tourisme Québec campaigns.

Since 1993 regional and local tourism players in particular have increased their investment, not only on the domestic market but also on foreign markets. Their investment was made possible by the renewal of financial support by Tourisme Québec to regional tourism associations ($8.1 million), the contribution of the accommodation tax in support of *Tourisme Montréal* and the *Office du tourisme de Laval* ($8.8 million), and Federal Government contributions ($5.1 million) via Economic Development Canada.

In recent years, promotional budgets allocated to Tourisme Québec have been increased by the *Ministère des Finances* in the form of special, non recurring budgets for specific activities (1994-1995 recovery plan, aid to disaster-stricken areas in 1996, exchange rate campaign in 1998-1999, etc.).

The combination of a continually decreasing Canadian dollar and spiralling costs of media investment, particularly in the United States, not only affects the ability of Tourisme Québec to position Québec as a destination, but also decreases potential leverage among public and private partners.

Partnership

In light of the number of players and massive investment needed to position Québec on a highly competitive marketplace, the move to sign formal partnership agreements with the public and private sectors at the regional and national levels must be accentuated. The adoption, on the medium term, of common strategies and deadlines will provide the foundation for the partnership.

However, even the best planning cannot solve every problem. On American and foreign markets, partnerships are increasingly based on business opportunities (new or improved flight connections, new client segments to explore, unplanned media events, et al.) quickly associating players ready to invest, such as big business and the Canadian Tourism Commission.

1.6 Trends and Outlook

Between now and 2010 the outlook for growth in international tourism appears excellent. Around the world, international tourist arrivals will escalate from 702 million in 2000 to 1.18 billion in 2010, an increase of 45%. Tourist clienteles travelling to foreign destinations will become increasingly diversified as a result of the emergence of new originator markets. In North America, expected growth will be slightly lower (41%) than world growth; in 2010, the number of clients travelling to North America will increase by 60 million in comparison to 2000.

The outlook for domestic tourism is interesting. Retirees during this period (especially between 2005 and 2010) will be wealthier than their predecessors. Contrary to the past decade, the active population should benefit from more disposable income with a lowering of income tax rates. Therefore, people will have more money to travel. The increasing number of retirees will have an impact on travel behaviour, with the emphasis likely to be placed on short trips during the off-season. Finally, the population of allophones, who tend to travel little in Québec, is growing.

However, competition will continue to be fierce on all markets. In 1995 Tourisme Québec was the only major player on the Québec market. During the summer of 2000, the Canadian Tourism Commission and four provinces (New Brunswick, Ontario, Nova Scotia and Prince Edward Island) also solicited Québec-based clientele. Ontario has benefited annually from $30 million in tourism promotion since 1998. In 1999-2000 the budget allocated by American states for tourism grew 13% as compared to the previous year.

Under the pressure of demographic, social and technological changes, clienteles are becoming diversified and demanding, which is having a major impact on tourism behaviour.

- Interests are multiplying, leading to a rising number of theme trips and an upsurge in products and activities. Mass tourism is giving way to activities tourism. Increasing the number of activities will lead to an increase in volume.
- The desire to learn is favourable to cultural tourism and authentic, friendly and exotic destinations.
- Concern for the environment requires that tourism producers exercise care in the development of their sites.

- More and more women are making the travel decisions.
- Short-stay clienteles are growing on nearby markets: weekend trips by Americans have increased by 69% since 1987. This trend has led to an extension of the tourism season.
- In the United States, the population of racial and ethnic minorities continues to outpace the growth of white non-Hispanics.
- Tourists are seeking the range of experiences offered by extended travel: they like to visit several destinations.
- There is increasing use of the Internet to gather information and even to make reservations.
- Baby boomers do not feel old, so their travel behaviour will differ from that of previous generations of retirees.
- Travel combining business and pleasure is gaining in popularity.
- More and more often, tourists are seeking memorable, personalized trips that feature better integrated products and services. Currently, the most successful businesses are those that organize their products in the form of experiences (for example cruises, Mont-Tremblant, Las Vegas).

Strategic Areas

Developing and organizing tourism products adapted to customer expectations

The notion of individualism is taking precedence in all areas of consumption; the tourism industry cannot evade the trend. Individuals create their own tourism experience even as they consume it.

This is why client focus has become the cornerstone of Québec's tourism development policy. The proposed organization of tourism products is based on an experience approach integrating three key aspects:

- reinforcing the distinct character of products offered in Québec;
- highlighting the memorable character of the experience itself;
- personalizing products and activities.

Adapting promotional strategies to emerging new information and communications technologies

From March 1999 to March 2000 the number of hits on the Tourisme Québec Web site tripled and the number of e-mail requests increased by 73% from 1998-1999 to 1999-2000. On the other hand, requests for information by telephone decreased, particularly from the American market (decrease of 44% since 1995).

In 2003 approximately 500 million cybernauts around the world will benefit from direct access to tourism products. Never will Québec have profited from such media visibility in the field of tourism. In 2003 travel-related e-trade will exceed $16 billion.

In a recent survey among American clients visiting Québec, 28% of respondents indicated having accessed the Internet for their primary travel planning arrangements while 94% declared having Internet access.

Yet only 1.5% of Québec's advertising budget this year will target cyberspace, even though the Internet could facilitate transactions valued at $3 billion.

The Internet has changed the fundamentals of promotional strategy. The number of hits on a site provides on-the-spot confirmation of customer interest in a promotion and the ability to make necessary adjustments. In light of this transformation, promotional strategies should gradually be modified in years to come so as to determine which media combination (Internet, press, TV- radio) offers the best cost-effectiveness ratio.

Granting priority to markets offering the best return on investment

Promotional investments in some high-performance markets like Québec are already significant ($12.6 million). Although investments in foreign markets are superior ($39.1 million) their impact is mitigated. For example, the American market, deemed the foremost originator market of tourists in the world, is solicited aggressively by all tourist destinations.

The 2000-2005 marketing strategy proposes support of target markets based on a decision model that grants precedence to a return on investment.

Building a partnership between Tourisme Québec and industry

In the last decade most government tourism organizations in Canada have been transformed in order to associate the tourism industry with decisions concerning the promotion of tourist destinations.

Increased competition and dispersed efforts on markets call for a market reorganization where players interested in investing in market development would group together.

Knowing the clientele and assessing results

Client segmentation, government policy relative to results, the emergence of problems highlighted by Statistics Canada surveys (Canadian Travel Survey, International Travel Survey) render inevitable the implementation of an integrated client search program, strategic watch and assessment of results. This program is essential:

- to ensure that product organization corresponds to customer expectations in terms of the market;
- to verify the pertinence of promotional strategies;
- to justify investment already granted by government and investments required to ensure the development and promotion of the destination;
- for better assessment and consolidation of Québec's competitive position.

Strategic Choices

3.1 Tourist Experiences

Organizing the product is akin to voluntarily rearranging tourist areas that include cities, zones, sites, attractions, businesses, etc. These locations must be developed in a way that distinguishes them from the world of standard products and services and favours personalized and memorable experiences.

Themes

Québec has a variety of exclusive and often original assets: a culture and heritage unique to North America; a rich historical background; unspoiled wilderness and grandiose landscapes; magnificent winters and a warm and friendly population, but to name a few.

Concomitant to product organization, themes link lead-in products, natural or cultural resources present in the environment, and activities and services. A theme must consider the atmosphere, natural (countryside, environment, climate and vegetation) and cultural contexts, organization of service infrastructures and the cooperation of service providers and local partners responsible for the logistics of product and service organization.

Increased tourist participation

The degree of participation of tourists is synonymous with unforgettable experiences. In addition to being interesting, presentations must favour the total immersion of tourists in order to qualify as memorable.

Consequently, the best tourist experiences are organized so as to excite all the senses: sight, sound, smell, taste and touch. To achieve this, producers increasingly must consider the overall setting of their lead-in product with the aim of making it more aesthetically pleasing, more comfortable, more entertaining, more interesting, etc.

Personalized product

In the context of heightened client segmentation and an era where clients view themselves as unique and deserving of special treatment, destinations and businesses must develop specific products.

Therefore, the challenge facing businesses and destinations consists of producing custom products at popular prices. Because many businesses operate with very tight profit margins, they cannot necessarily increase production costs (infrastructures, labour, equipment, etc). Therefore, they must elect different combinations of environments, activities and services adapted to customer tastes. Knowledge of customers' needs and expectations is instrumental to success.

3.2 Priority Products

Priority products listed in the previous marketing strategy generated a striking amount of travel volume, resulting in significant breaks into foreign markets. Although the 2000-2005 marketing strategy retains the same range of products, it nonetheless recommends their extension. The proposal that follows considers the diversity of Québec's tourism product in recent years.

Eight priority products are presented so as to highlight their components and related services, activities and resources.

TOUR is a trip where the itinerary is focused on the discovery of communities and their natural and cultural environments. The trip often combines a stay in a major city.

Components	Activities and complementary services
• Geographic tours • Theme or regional tours: religious*, farm holidays, discovery of First Nations communities, etc. • Emerging tours: bicycle tourism, camping, caravanning, etc.	• Natural, cultural and heritage environments • Tours and road stops • Attractions; sites and tourist events • Outdoor activities • Types of accommodation on the increase: B&Bs, camping • Emerging: the Green Road

* Theme or regional tours allow tourists to discover original aspects of a territory such as natural surroundings, social life, historical background, etc.

URBAN STAY is dedicated to visits to main attractions of a large city during stays of short or medium duration.

Components	Activities and complementary services
• Entertainment • Culture • Winter urban stay • City-escapade* • Emerging: international cruises	• Montréal, Québec City, Hull • Shopping • Cultural and sports events • Nightlife • Fine dining • Cruises-excursions • Light shows

* The escapade offers tourists enjoying an urban stay the opportunity to visit rural or natural areas of the Québec destination during a trip that usually includes a one-night stay away from Montréal or Québec City.

RESORT STAY is most often synonymous with relaxation, well-being and the outdoors. Facilities are located in high quality natural surroundings that are easily accessible and feature a wide range of activities. Summer and fall are the high seasons.

Components	Activities and complementary services
• Health centres • Golf • Emerging: winter resort stays and forest resorts	• Resort areas • A variety of sports and outdoor activities • Emerging: other sports such as sliding and other outdoor winter activities

DOWNHILL SKIING is characterized by a stay at a ski resort offering accommodation along with indoor and outdoor activities.

Components	Activities and complementary services
• Downhill skiing • Cross-country skiing	• Snow quality • Ski centres near major cities • Snowboarding, night skiing

HUNTING AND FISHING stays are almost exclusively dedicated to the main activity and are backed by the possibility of high capture rates offered by a network of outfitters.

Components	Activities and complementary services
• Hunting and fishing outfitters	• Wildlife • Northern Québec

SNOWMOBILING is an activity that combines, particularly with outfitters, tours over long distances and accommodation over several nights.

Components	Activities and complementary services
• Snowmobiles	• Extensive network of trails • Snow quality

OUTDOOR ADVENTURE is a trip that focuses on outdoor activities amid natural surroundings.

Components	Activities and complementary services
• Outdoor adventure • Ecotourism*	• A variety of outdoor activities, particularly during winter • High quality natural (parks, etc.) and cultural (Aboriginal communities, etc.) settings • Non-traditional means of transportation (snowmobiles, dogsleds, kayaks, etc.)

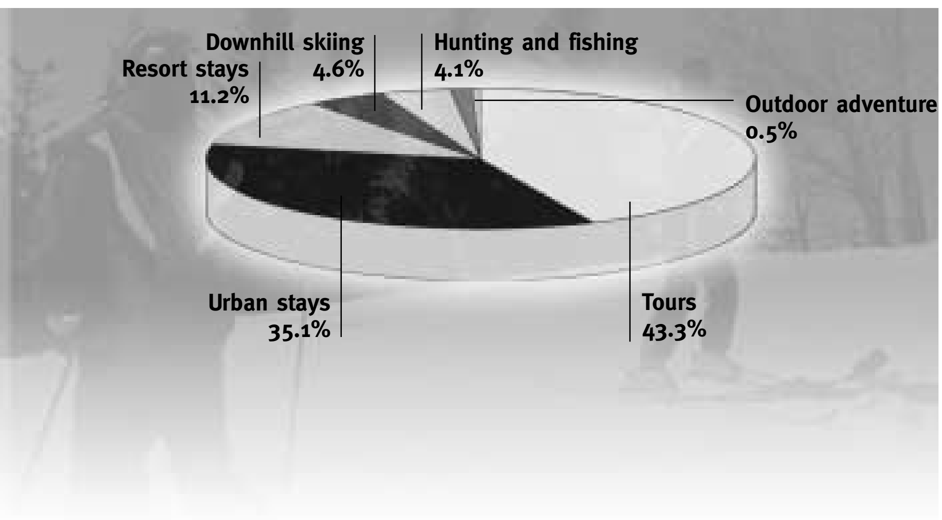
* Ecotourism interests environmentally aware clients. These tourists expect a premium quality product.

MEETINGS, CONVENTIONS AND INCENTIVE TRAVEL cater to business. Product combinations, activities and services vary in response to the needs of each of the three client segments.

Components	Activities and complementary services
• Conventions	• Convention facilities • Airline service • Activities before and after the convention • Luxurious accommodation and fine VIP services cuisine
• Incentive travel*	• Convention facilities • Airline service • Activities before and after the convention • Luxurious accommodation and fine cuisine • VIP services
• Meetings	• Accommodation • Airline service

* Urban stays constitute the main lead-in product on the American market, whereas European clienteles prefer outdoor adventure.

Estimated leisure clientele per product in 1998
percentage



Total intra-provincial visits: 5,553,408

3.3 Priority Markets for Leisure Tourism

Market selection grid

In order to optimize market return, markets will be selected on the basis of criteria that consider the current performance of Québec on these markets:

- number of trips to Québec and corresponding revenue;
- growth recorded between 1993 and 1999;
- market penetration rate;
- Québec's market share in Canada.

The grid also considers certain variables that favour profitable market operation:

- population size and the tendency to travel abroad;
- access to air service;
- presence of a Tourisme Québec consultant;
- presence of partners (travel intermediaries from Québec or abroad, Canadian Tourism Commission, etc.).

An overview of the characteristics of different markets is provided in the statistics appendix.

Three key, market-based strategies

SECURING AND MAINTAINING LOYALTY

This strategy targets mature markets and implies…

- that promotional investment made by Tourisme Québec will remain at its current level; however, investment outlay could be altered to take advantage of promising opportunities (for example the metropolitan Toronto area);
- continuing partnership between Toursime Québec and industry.

INVESTMENT

This strategy targets markets offering the best potential for development on the short term, which means that…

- Tourisme Québec will make most of its promotional investment here;
- promotional strategies will target consumers in particular.

Investment outlay will be based on market development potential. Therefore, investment on Level 1 markets with greater potential for development will exceed investment outlay on Level 2 markets, and so on.

CANVASSING-PROSPECTING

This strategy applies to markets where development potential must be assessed. It denotes…

- promotional investment that is more modest in scale;
- promotional vehicles that vary on the basis of market potential (trade missions, activity targeting market intermediaries such as wholesalers, tour operators, press relations, etc.).

Market breakdown on the basis of key strategies

SECURING AND MAINTAINING LOYALTY
Québec
Ontario
United States: New England

These three markets account for 81% of tourist volume in Québec, but only 56% of tourism revenue. The number of captive clients is noteworthy (Quebecers, Ontarians from north-eastern regions, neighbouring American customers) and they are attracted by the proximity of the destination. However, owing to their impact on the Québec tourism industry, these client groups need to be secured and attracted by new products. The three markets, considered mature markets, nonetheless include underdeveloped client segments and territories that require additional promotional effort, including:

- Anglophones, allophones and young people from Québec;
- inhabitants of Toronto and Boston.

LEVEL 1 INVESTMENT
United States: Atlantic Centre
France

These markets account for 8% of tourist volume in Québec and 21% of tourism revenue. Although geographically distant from each other, they enjoy the same penetration rates, which is a measure of the past success of the tourism industry on these markets. Since 1993 market growth has been excellent, particularly in terms of size, accessibility and in securing the loyalty of current client groups to the destination. More intensive development of these markets will necessitate an increase in promotional investment.

LEVEL 2 INVESTMENT
United States: Midwest
United Kingdom
Germany

These markets account for 3.7% of tourist volume in Québec and 7.5% of tourism revenue. To some extent, these markets have experienced notable growth since 1993, owing to the efforts of Tourisme Québec (canvassing) and those of industry, increasing present on these markets. Additional investment will be required if they are to continue to grow; however, the level of investment proposed considers operational limitations.

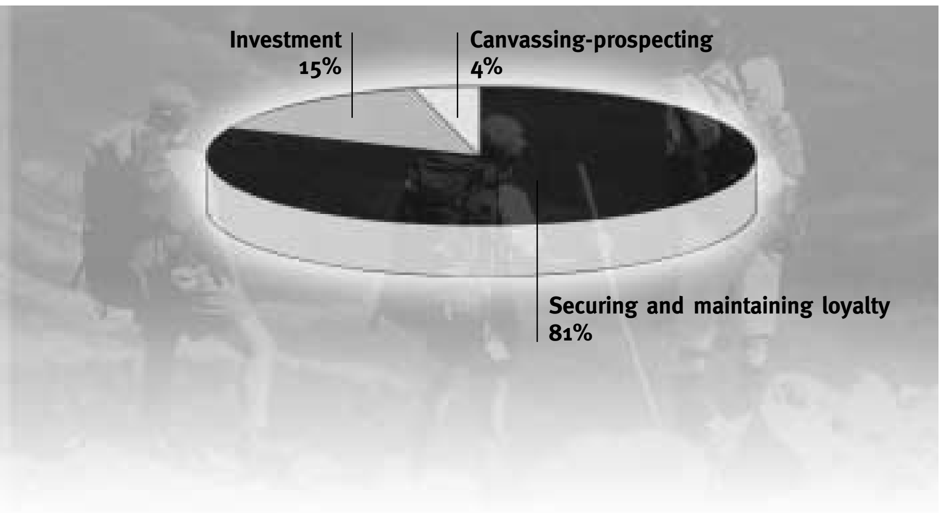
LEVEL 3 INVESTMENT
United States: The South and the West
Italy
Japan
Mexico

These markets account for 2.8% of tourist volume in Québec and 9.5% of tourism revenue. They share the same problem as Level 2 markets; however, they are differentiated by even greater operational limitations and by the fact that Tourisme Québec has entered these markets only recently. Despite this, they are characterized by a return (Japan, Mexico) or favourable new operating conditions (southern and western United States, Italy) that justify an increase in promotional investment in years to come.

CANVASSING-PROSPECTING
Belgium, Switzerland, The Netherlands Scandinavia, Spain, Brazil, Argentina, South Korea, Taiwan, Hong Kong, Australia, New Zealand

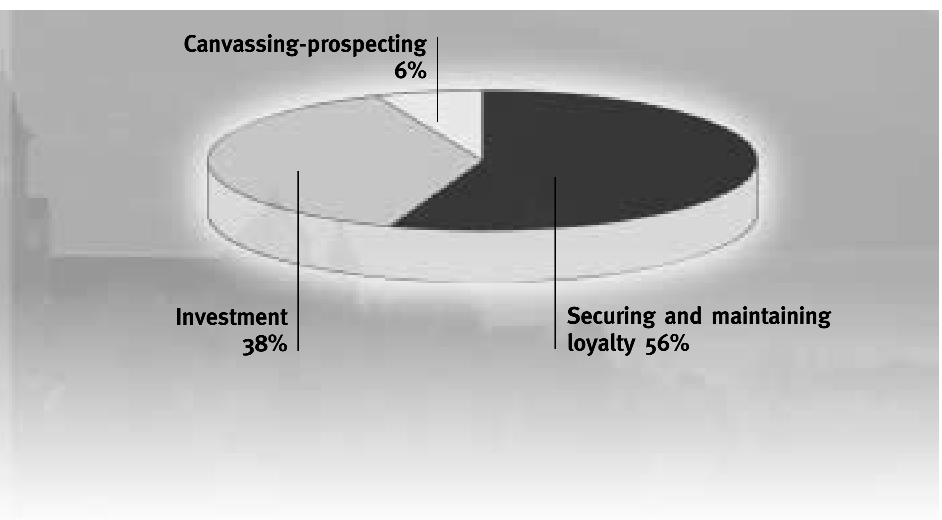
These markets account for 3.9% of tourist volume in Québec and 6.3% of tourism revenue. They have characteristics that lead to believe that they could be interested in the Québec destination. Some markets have already shown promising results (Belgium, Switzerland). However, before making additional investments in promotional activities aimed at consumers, their potential for development must be assessed. This market category is bound to change in the near future, with some markets being abandoned and others added, depending on market opportunities that could emerge.

Volume of leisure clientele (1998) per market group based on the key strategy proposed



Total intra-provincial visits 7,991,000

Leisure clientele expenditures (1998) per market group based on the key strategy proposed



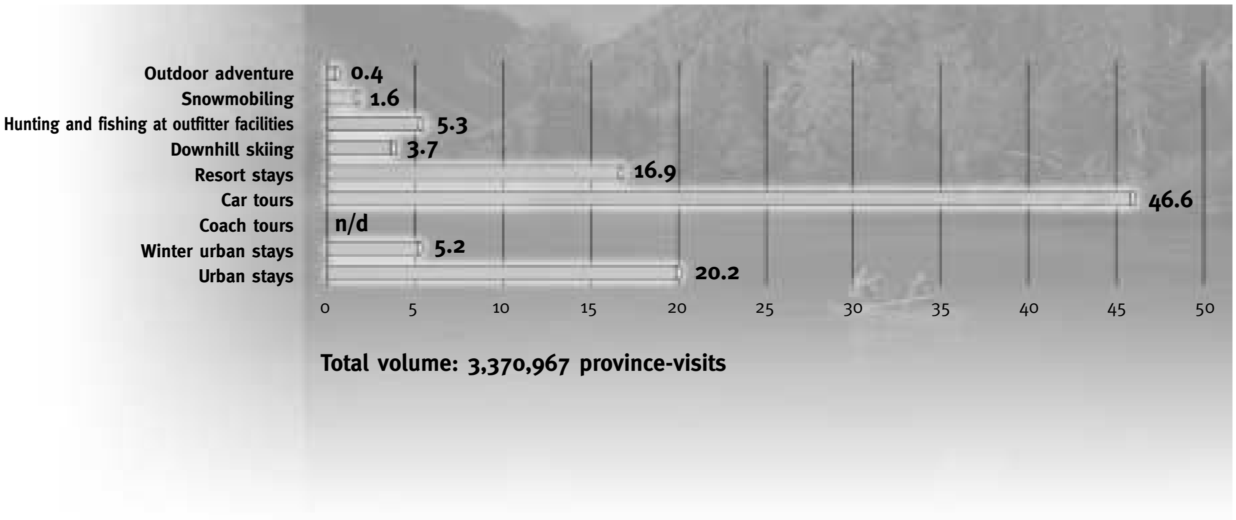
Total revenue: $2,115 million

Market-based lead-in products to promote

Québec market

Without doubt, the main characteristic of Quebecers in terms of clientele is a propensity for regional exploration, since 50% of leisure travel takes place within the context of a tour. In comparison to other markets, urban stays (25.4% of province-visits) are much less popular.

Estimated demand of leisure tourists residing in Québec for tourism products in 1998
percentage



Market in Ontario and other provinces

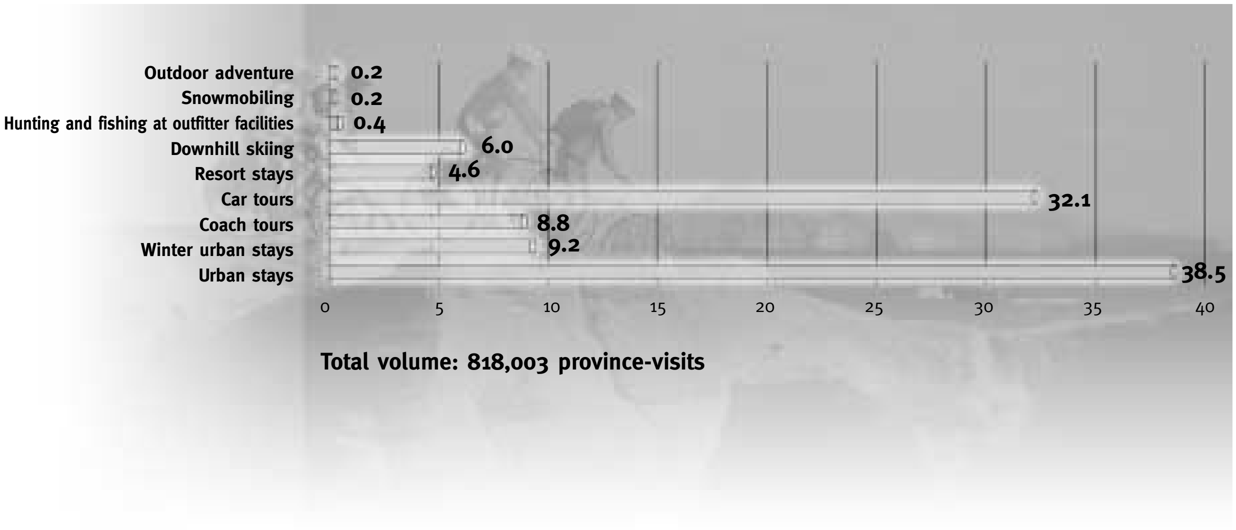
Much like foreign markets, the market associated with other provinces in Canada prefers the urban stay (close to 48% of leisure tourism travel to Québec).

Although proportionally lower, the tour nonetheless remains a popular product (more than 40% of province-visits). Preferred destinations include central regions of Québec such as the Outaouais and the Laurentian Mountains.

Contrary to tourists from the United States and other countries, tourists from Ontario prefer the winter season, particularly for urban stays and downhill skiing. The trend is intensified by tourists from urban Toronto for whom leisure travel during the months of January, February and March (30%) is almost as popular as travel during the months of July, August and September (34%).

Despite the importance of accommodation in chalets or private residences (1/3 of province-visits originating from Ontario) visitors from Ontario more often opt for commercially operated resorts than do tourists from United States and other countries.

Estimated demand by leisure tourists residing in other provinces of Canada for tourism products in 1998
percentage



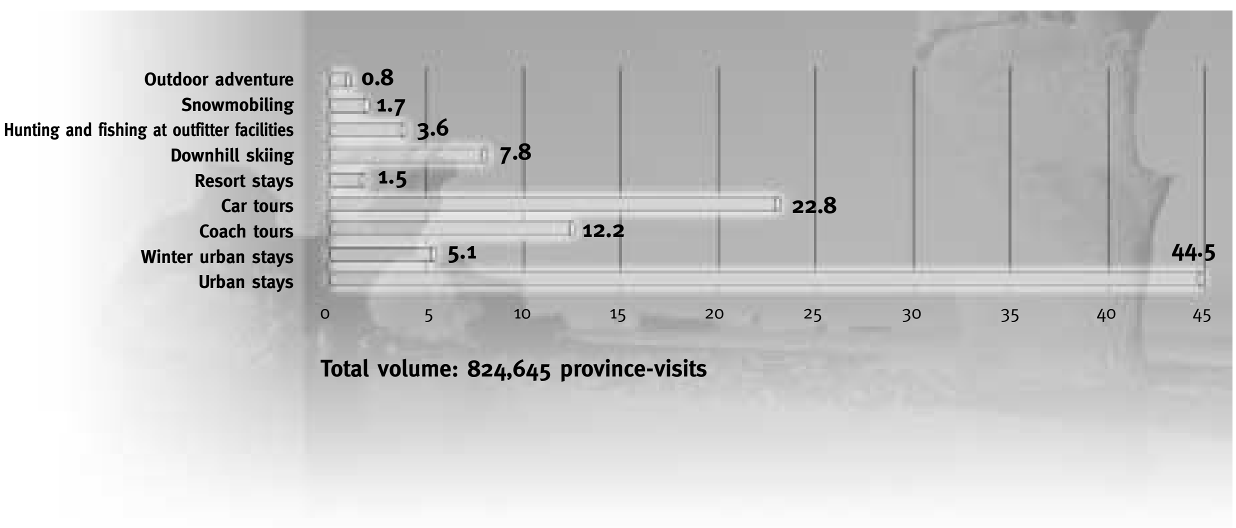
American market

The American market is characterized by a strong interest in urban stays (68% of tourist region-visits took place in the tourist areas of Montréal and Québec City).

Even the tours offered (35% of province-visits) tend to favour neighbouring regions of Montréal. Remote regions of Québec account for only 6% of travel.

Americans also like to travel in the fall (October, November and December: 22% of province-visits) and are showing increased interest in winter travel (from 1998 to1999: 28% increase in volume). The phenomenon is attributable in part to the fine performance of products such as hunting and fishing, downhill skiing and snowmobiling.

Estimated demand by leisure tourists from the United States for tourism products in 1998
percentage



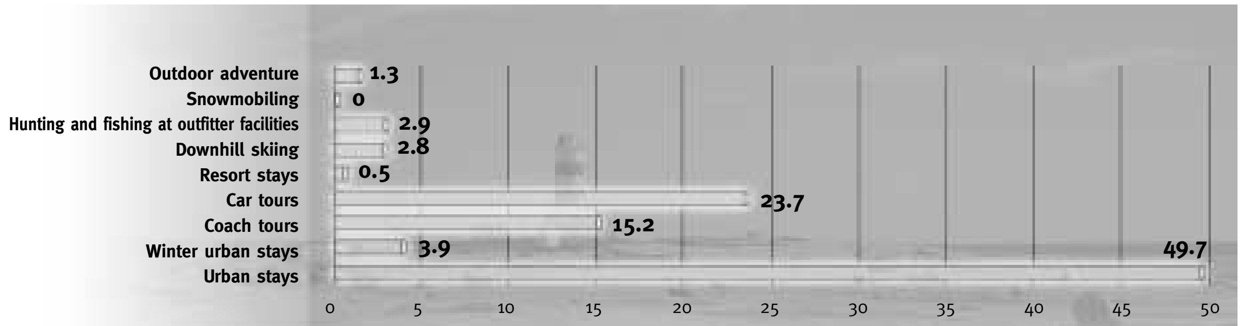
Markets in countries other than the United States

Of all markets, foreign visitors show the greatest propensity for leisure tourism travel (54%).

The two dominant products are urban stays (53.6%) and tours (38.9%). These markets, along with the Québec market, are the only clienteles interested in discovering the remote regions of Québec. Extended tours, by car and coach, take place primarily in the spring and summer.

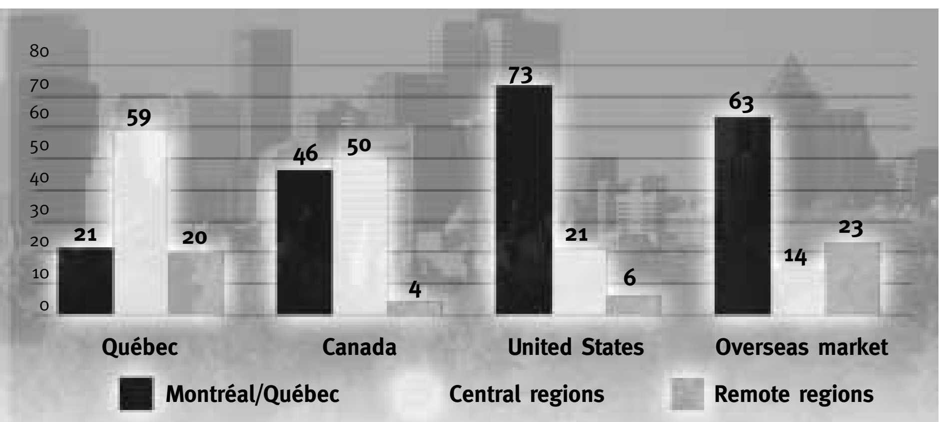
These markets also show significant interest in outdoor adventure. The French, Swiss and British lead in terms of numbers of leisure tourists travelling during the first quarter.

Estimated demand by leisure tourists residing in foreign countries other than the United States for tourism products in 1998
percentage



Total volume: 539,746 province-visits

Region visited by leisure tourists, based on market of origin in 1998
percentage



Central regions: Eastern Townships, Chaudière-Appalaches, Lanaudière, Laval, Mauricie-Bois-Francs, Montérégie, Outaouais

Remote regions: Abitibi-Témiscamingue, Bas-Saint-Laurent, Charlevoix, Duplessis, Gaspésie, Magdalen Islands, Manicouagan, Northern Québec, Saguenay-Lac-St-Jean

Market-based products and services to promote

In light of consumer behaviour with reference to tourism in Québec, products and activities listed in the tables below will be promoted on priority markets.

	Québec	Ontario	United States: New England, Atlantic Centre	United States: Midwestern, Southern, Western
Urban stays (summer-fall)		■	■	■
Urban stays (winter)		■	■	■
• Cities – escapades		■	■	
Tours	■	■	■	■
• Theme tours		■	■	
• Aboriginal tourism				
• Bicycle tours	■	■	■	
Resort stays	■	■	■	
• Health tourism	■	■	■	
• Golf		■	■	
Downhill skiing	■	■	■	
Snowmobiling		■	■	
Cross-country skiing		■	■	
Hunting and fishing		■	■	
Outdoor adventure	■	■	■	
International cruises			■	■

	France	Germany	United Kingdom	Italy	Others Europe	Japan	Others Asia-Pacific	Mexico
Urban stays (summer-fall)			■					■
Urban stays (winter)								
• Cities – escapades								
Tours	■	■	■	■	■	■	■	■
• Theme tours								
• Aboriginal tourism	■	■		■	■			
• Bicycle tours								
Resort stays			■			■		
• Health tourism								
• Golf								
Downhill skiing			■					■
Snowmobiling	■			■				
Cross-country skiing								
Hunting and fishing	■							
Outdoor adventure	■	■	■	■	■			
International cruises								

Market-based promotional activity

Both the choice and the combination of promotional activities are dependant on market awareness of Québec. Consequently, strategies to secure and maintain loyalty and investment on more mature Level 1 markets will be aimed at consumers. Alternatively, activity on other markets will target industry.

Consumer-related activities:

- Advertising campaigns
- Trade shows for consumers
- Direct marketing
- E-business centre (Bonjour Québec.com)

Industry-related activities:

- Trade shows and familiarization tours
- Marketing support (distribution network)
- Press relations

Market	Consumers	Industry
Québec	Priority 1	
Ontario	Priority 1	Priority 2
• New England, Atlantic Centre	Priority 1	Priority 2
• Midwest, Southern, Western	Priority 2	Priority 2
France	Priority 1	Priority 2
United Kingdom	Priority 2	Priority 2
Germany	Priority 2	Priority 2
Italy	Priority 2	Priority 2
Others, Europe		Priority 2
Japan	Priority 2	Priority 1
Others, Asia-Pacific		Priority 2
Mexico	Priority 2	Priority 1

Priority 1 Priority 2 Overridable

3.4 Priority Markets for Meetings, Conventions and Incentive Travel (MCIT)

MCIT groups together different client segments:

- Convention clientele
- Corporate meeting clientele
- Incentive travel clientele.

The performance of MCIT depends first and foremost on the state of the economy and the strength of economic relations between Québec and other countries. This holds particularly true for corporate meetings.

These variables also affect conventions and incentive travel; however, their performance is quite strongly influenced by promotional activity.

CONVENTIONS

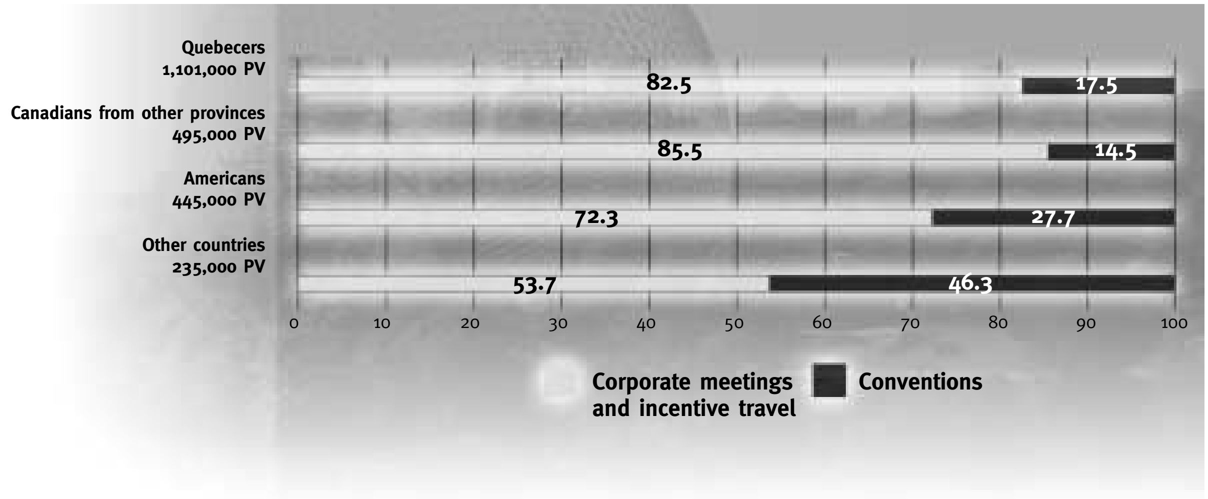
The growth of convention tourism in Québec and the significant contribution of tourism bureaus located in Montréal and Québec City, as well as the presence of convention centres in Montréal and Québec City have all led to a sharing of responsibilities. Tourisme Québec and the abovementioned organizations ensure the promotion of conventions on foreign markets, whereas the *Association des bureaux de congrès du Québec* intervenes on the Québec market. Tourisme Québec coordinates action between local and regional partners and foreign sales representatives.

CORPORATE MEETINGS AND INCENTIVE TRAVEL

The promotion of corporate meetings and incentive travel is ensured by Tourisme Québec. Joint promotional activities on Canadian and American markets are on the upswing, serving better to target clienteles.

On other international markets, only incentive travel is promoted, in cooperation with the Canadian Tourism Commission.

Relative importance of meeting and convention tourists based on geographic market of origin in 1998
percentage of province-visits (PV)



Market selection grid

The selection of priority MCIT markets considers…

- countries with close economic ties with Québec;
- countries with economic activity most closely resembling that of the more dynamic sectors of Québec (for example, biotechnology, pharmaceutical industry, aeronautics, finance, insurance, high technology, automobile industry, agri-food industry);
- areas or cities in the United States with a high number of head offices of associations or corporations.

Key, market-based strategies and products to promote

American market

MCIT tourism originating in the United States is growing at a much faster rate than leisure tourism, increasing an average 8% per year between 1993 and 1998.

It represents, above all, business clientele, with convention clientele generating close to 37% of receipts.

Whether for corporate meetings or conventions, nearly two-thirds (63%) of Americans choose Montréal as their destination.

The originator group of MCIT Americans is much more widespread than that of leisure clientele. Although Atlantic Centre (21% of trips) dominates, distant regions such as the Mid-northeast (16%), the South Atlantic (15%) and the Pacific (9.6%) have posted very good results.

Other international markets

Clients from other countries include both convention and corporate meeting clienteles.

They generally choose the region of Montréal as their destination, particularly for conventions.

Close to half of all clients are European.

The Asian market accounts for close to a third of all trips. This market has experienced the most growth in recent years.

Key, market-based strategies

Key strategies	Priority products	Priority markets
INVESTMENT	Corporate meetings and incentive travel	Priority #1: Canada and the United States (New York, Chicago and Los Angeles) Priority #2: United States (Boston, Atlanta, Dallas and Houston)
CANVASSING–PROSPECTING	Incentive travel	Priority #1: France Priority #2: United Kingdom (priority granted to the UK could increase, since market potential could be greater than that of France) Priority #3: Germany Priority #4: Italy

Type of market-based promotional activity

Canada and the United States

- Increased number of canvassers: Tourisme Québec telemarketing service and canvassing in Toronto.
- More marketing via the Internet: agreement between Tourisme Québec and tourism and convention bureaus in Montréal and Québec City.

Europe

- A general increase in activity
- Assistance in developing business relations with receptive wholesalers.
- Creation of a database on incentive travel clienteles.

3.5 Partnership

National marketing partner

The 2000-2005 marketing strategy calls for the implementation of a national partnership based on the adoption of shared objectives and assessment of results obtained.

A committee of experts made up of members of the *Forum permanent de l'industrie touristique* will be mandated to review the strategy on a yearly basis and to follow the evolution of the following objectives:

- to develop public and private partnerships for tourism promotion;
- to establish a shared schedule for planning marketing;
- to adjust the strategy on the basis of results obtained and changes in context.

A market-oriented commercial partnership

The 2000-2005 marketing strategy also proposes forming market committees including partners ready to invest financially.

The mandate of each committee will be:

- to propose policies;
- to maximize the return of promotional investment;
- to ensure that action taken is complementary;
- to favour strategic alliances;
- to evaluate results of action taken.

The three markets concerned include Québec, the Canado-American market and the foreign countries market.

Collective approaches will also be developed and implemented by Tourisme Québec and regional tourism associations in order to optimize the use of public funds to promote Québec at home and abroad.

Joint action to organize the tourism product

Appropriate means of joint action will be introduced to ensure that priority products and activities are upgraded in response to customer expectations. In addition, market committees will be informed of the means employed.

3.6 Research and Assessment

Competitive advantages are becoming less and less durable. In order to stand out, tourist destinations must use existing information and expertise more efficiently than does the competition.

Tourisme Québec's operational priorities include:

- setting up a competitive intelligence network in cooperation with the tourism industry;
- improving the reliability of the Canadian Travel Survey (CTS) and the International Travel Survey (ITS) information and conducting necessary surveys and inquiries;
- providing Tourisme Québec with an information management system on priority products and activities, markets offering the most potential for return (for example the North American and French markets) and client segments that are less well known, such as corporate meetings and incentive travel clienteles;
- establishing a system to continuously evaluate promotional action taken in partnership with the tourism industry.

3.7 Funding

Starting in 2001-2002 Tourisme Québec will benefit from a basic annual budget of $35 million to implement strategy.

The budget will serve to maintain investments on markets to secure loyalty, to strengthen canvassing and prospecting efforts and above all, to double Tourisme Québec's ability to intervene on markets with strong potential for growth.

Tourisme Québec's investments per market according to the key strategy proposed

Key strategies	Markets	Basic BUDGET for 2000-2001 (millions of $)
Securing and maintaining loyalty	Québec Ontario United States: New England	4.0
Investment	United States: Atlantic Centre France United States: Midwest United Kingdom Germany United States: South United States: West Italy Japan Mexico	29.5
Canvassing-prospecting	Belgium, Switzerland, the Netherlands, Scandinavia, Spain, Brazil, Argentina, South Korea, Taiwan, Hong Kong, Australia, New Zealand	1.5
TOTAL		**35.0**

3.8 Objectives and Results

Growth objectives

Growth objectives of the 2000-2005 marketing strategy in terms of volume of travel and revenue are based primarily on the past performance of the Québec destination and forecasts established by the Canadian Tourism Research Institute.

The forecasts consider foreseen increases of promotional investment on international markets. This is why objectives for the American market (35% for province-visits and 65% for revenue) and for the markets of countries other than the United States (40% for province-visits and 80% for revenue) exceed the objectives for the Québec and Canadian markets.

Growth objectives in terms of volume and revenue

	Volume (millions of province-visits)		Revenue (millions of $)	
Markets	**1998**	**2005**	**1998**	**2005**
Québec	12.7	16.5	1,678	2,517
Canada	2.8	3.8	698	1,117
United States	2.1	2.8	924	1,525
Other international markets	1.2	1.6	991	1,784
TOTAL	**18.8**	**24.7**	**4,291**	**6,943**

Other objectives

• The competition	• Increase of 17% to 20% of Québec's market share of international tourism revenue in Canada in 2005.
• Tourism deficit	• Decrease in the deficit of $369 million (in 1998) to $200 million in 2005.
• Product organization	• Membership of 4,000 tourism companies in the quality program between now and 2005.
• Innovative information and communications technologies	• Membership of 1,250 establishments offering accommodation in the e-business centre from now to 2005.
• Promotional partnership	• Increase in the financial contribution of public and private partners in advertising campaigns (38% in 1999) until equality with Tourisme Québec is achieved by 2005.
• Winter tourism	• Increase in the percentages of winter travel (up to 29% in 2005) and expenditures (up to 26% by 2005).
• Meetings, conventions and incentive travel	• 25,000 telephone contacts made each year with identification of 3,000 potential clients per year.

Accountability

In conformity with its commitment to strengthen partnerships with private industry in all sectors of economic activity, the Government of Québec recently enacted legislation to modernize the civil service. This obliges organizations such as Tourisme Québec to provide an annual report describing the year's activities.

However, meeting the objectives indicated in the 2000-2005 marketing strategy is not the responsibility of Tourisme Québec alone. Objectives will be met as a consequence of the combined efforts of Tourisme Québec and the tourism industry, thereby resulting in shared responsibility.

Statistics

Characteristics of priority markets

	Québec	Ontario	United States
Population	7.3 M	11.3 M	270 M
Travel abroad	3.1 M	8.5 M	52.7 M
Travel in Québec	All purposes: 12.7 M Leisure: 5.2 M	All purposes: 2.8 M Leisure: 912,000	All purposes: 2.1 M Leisure: 1.1 M
Revenue in Québec (leisure)	828 M$	196 M$	503 M$
Penetration rate (leisure travel / 1,000 inhabitants	711.6	80.7 – Eastern region: 445 – Toronto: 35.5	4.0
Québec's market share in Canada	88 %* (Leisure)	67.7 %** (Leisure)	11.3 %*** (Leisure)
Growth between 1993-1998	N/A	N/A	+10.2 % (Leisure)
Growth between 1995-1998	N/A	N/A	N/A
CTC investment (2000-2001)	N/A	N/A	21.9 M$
TQ investment (1999-2000)	2.4 M$	1.3 M$	8.6 M$ (excluding the cost of the canvassing network)
Sales personnel			100
TQ canvassers on location	Yes	Yes	—
Accessibility during the month of December 1999 (number of flights per week to Montréal)			865
Key strategy	Secure and maintain loyalty	Secure and maintain loyalty	—
Strategy implementers	Partners, Tourisme Québec	Partners, Tourisme Québec	—

* Among all trips made by Quebecers in Canada, 88% travelled in Québec.
** Among all trips made by Ontarians outside of Ontario, in Canada, 67.7% travelled to Québec.
*** Among all trips made by Americans to Canada, 11.3% travelled to Québec.
N/A: Not available.

UNITED STATES / CANVASSING AREAS				
New England	**Atlantic Centre**	**West Centre**	**South**	**West**
10.2 M	56.6 M	72.2 M	78.2 M	53 M
N/A	N/A	N/A	N/A	N/A
Total: 678,000 Leisure: 411,000	Total: 682,000 Leisure: 390,000	Total: 347,000 Leisure: 160,000	Total: 220,000 Leisure: 83,000	Total: 156,000 Leisure: 51,000
149 M$	196 M$	72 M$	50 M$	36 M$
40.3	6.9	2.2	1.1	1.0
49.7% (Leisure)	16.1% (Leisure)	4.6% (Leisure)	10.2% (Leisure)	2.4% (Leisure)
+ 23.3% (Leisure)	– 1.4% (Leisure)	N/A	N/A	N/A
+ 30%	– 15.9% (Leisure)	– 5.4% (Leisure)	– 1.3% (Leisure)	– 38.8% (Leisure)
N/A	N/A	N/A	N/A	N/A
N/A	N/A	N/A	N/A	N/A
Yes	Yes	Yes	Yes	Yes
90	385	238	106	46
Secure and maintain loyalty	Investment 1	Investment 2	Investment 3	Investment 3
Partners, Tourisme Québec	Tourisme Québec, Partners	Tourisme Québec, Partners	Tourisme Québec, Partners	Tourisme Québec, Partners

Characteristics of priority markets

	OTHER COUNTRIES			
	France	United kingdom	Germany	Italy
Population	58.8 M	59 M	82.1 M	56.8 M
Travel abroad	3.5 M	6.3 M*	4.8 M*	2.2 M*
Travel in Québec	Total: 353,000 Leisure: 228,000	Total: 122,000 Leisure: 77,000	Total: 82,000 Leisure: 59,000	Total: 37,000 Leisure: 24,000
Revenue in Québec (leisure)	253 M$	51 M$	35 M$	12 M$
Penetration rate (leisure travel / 1,000 inhabitants	3.9	1.3	0.7	0.4
Québec's market share in Canada	60% (Leisure)	13.4% (Leisure)	14.4% (Leisure)	25.5% (Leisure)
Growth between 1993-1998	+12%	+79.5% (Leisure)	+59.2% (Leisure)	+7.1% (Leisure)
Growth between 1995-1998	N/A	N/A	N/A	N/A
CTC investment (2000-2001)	1.9 M$	2.1 M$	2.1 M$	0.9 M$
TQ investment (1999-2000)	0.9 M$ (excluding canvassing)	1.0 M$ (excluding canvassing)	0.9 M$ (excluding canvassing)	0.3 M$ (Others/Europe)
Sales personnel	80	30	20	15
TQ canvassers on location	Yes	Yes	Yes	No
Accessibility	Very good	Good	Average	Improving (direct (flight)
Key strategy	Investment 1	Investment 2	Investment 2	Investment 3
Strategy implementers	Tourisme Québec, partners	Tourisme Québec, partners	Tourisme Québec, partners	Tourisme Québec, partners

* Long distance travel only.
N/A: not available

OTHERS COUNTRIES				
Other countries in Europe	**Japan**	**Taiwan, Australia, South Korea, Hong Kong, New Zealand**	**Mexico**	**Brazil**
541.5 M	125.9 M	97.6 M	98.6 M	170 M
N/A	15.8 M*	N/A	5.5 M	3.7 M
Total: 194,000 Leisure: 87,000	Total: 106,000 N/A	Total: 64,000 N/A	Total: 42,000 N/A	Total: 24,000 N/A
66 M$	86 M$ (All purposes)	36.9 M$ (All purposes)	42 M$ (All purposes)	31 M $ (All purposes)
0.1	0,8 (All purposes)	0.7 (All purposes)	0.4 (All purposes)	0.1 (All purposes)
N/A	15.0% (All purposes)	N/A	29.8% (All purposes)	27.9% (All purposes)
+87.1% (Leisure)	+187.3% (All purposes)	N/A	+97.1% (All purposes)	+81.8% (All purposes)
N/A	N/A	N/A	N/A	N/A
0.9 M$	6.0 M$	1.7 M$	0.5 M$	N/A
0.3 M$ (including Italy)	0.4 M$ (excluding canvassing)	0.1 M$	0.07 M$	N/A
N/A	N/A	N/A	N/A	N/A
N/A	Yes	No	No	No
Good in Switzerland and Belgium	Poor	Poor	Good	Poor
Canvassing–Prospecting	Investment 3	Canvassing–Prospecting	Investment 3	Canvassing–Prospecting
Tourisme Québec	Tourisme Québec, partners	Tourisme Québec	Tourisme Québec, partners	Tourisme Québec

* Long distance travel only.
N/A: not available

Map of canvassing regions in the United States

NEW ENGLAND		
Maine	Massachusetts	Vermont
Rhode Island	New Hampshire	

ATLANTIC CENTRE		
Connecticut	Virginia	New Jersey
West Virginia	New York	Maryland
Pennsylvania	Washington D.C.	Delaware

MIDWEST		
Michigan	Missouri	Ohio
North Dakota	Wisconsin	South Dakota
Indiana	Nebraska	Minnesota
Kansas	Iowa	Montana
Kentucky	Wyoming	Illinois
Colorado		

SOUTH		
North Carolina	Mississippi	South Carolina
Arkansas	Georgia	Oklahoma
Florida	Texas	Alabama
Louisiana	Tennessee	New Mexico

WEST		
Alaska	Nevada	Washington
Idaho	Oregon	Arizona
California	Utah	Hawaii

Photos

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