

MARKETING PLAN

1997 • 1998

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FOREWORD

The 1997-1998 marketing plan presents the guidelines, strategies and priorities for action of the Québec government in terms of Québec's tourism marketing. It also describes Tourisme Québec's marketing activities to promote the products and services Tourisme Québec can provide the tourism industry and potential partners.

The marketing plan is designed not only as a reference tool for the entire tourism industry, but also as a means of furthering the development of partnerships for promoting Québec tourism, mainly by identifying the various opportunities offered. The information in the plan will ensure better customer service for the tourism industry, an objective at the heart of Tourisme Québec's mission.

This first marketing plan since 1993-1994 is also a response to the desire expressed by a large number of participants at the tourism industry forum to see Tourisme Québec adopt a stronger leadership role in the sector.

I would like to thank all the employees of Tourisme Québec who helped prepare this publication.

Rita Dionne-Marsolais

Minister for Industry and Trade

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1997-1998
**MARKETING
PLAN**

PERFORMANCE AND OUTLOOK

■ 1995: best performance since 1990

Following the beginnings of a recovery in 1994, tourism in Québec performed very well in 1995 (see Appendix 1). In fact, 1995 was the best year since 1990. The number of tourists increased by 800 000 (4%) over 1994 and tourism revenue rose by \$300 million (7%). This growth is due mainly to excellent results in international tourism:

- for the first time, revenue from overseas markets (countries other than the United States) (\$837 million) exceeded revenue from US tourism (\$762 million), despite an 8% increase in American tourism revenue;
- the total number of American tourists, which dropped between 1991 and 1993, continued the upward trend begun in 1994.

The Québec and Canadian markets grew by 3% in volume and 5% in revenue according to estimates made by the Canadian Tourism Research Institute (CTRI).

These results helped reduce Québec's tourism deficit considerably. In fact, between 1993 and 1995, the deficit was cut in half, from \$1.2 billion to \$558 million, and Québec achieved a tourism surplus of \$183 million in the third quarter of 1995 (June to August). This phenomenon may also be attributed to a drop in trips outside Québec by Quebecers.

This overall performance of the destination holds true for the leisure travel sector, where Tourisme Québec makes most of its investments in promotion. Compared with 1994,

- the number of tourists rose by 4% and revenue rose by 10%;
- overseas markets have done particularly well: the number of tourists rose by 20% and revenue rose by 22%.

Business tourism and conventions, Tourisme Québec's second area of interest, showed the same upward trend:

- the number of tourists rose by 6% and revenue, by 8%;
- overseas markets have done particularly well here too: the number of business and convention travellers increased by 12% and revenue rose by 13%.

Since the Canadian Travel Survey is carried out only in even years, Tourisme Québec uses CTRI estimates for odd years.

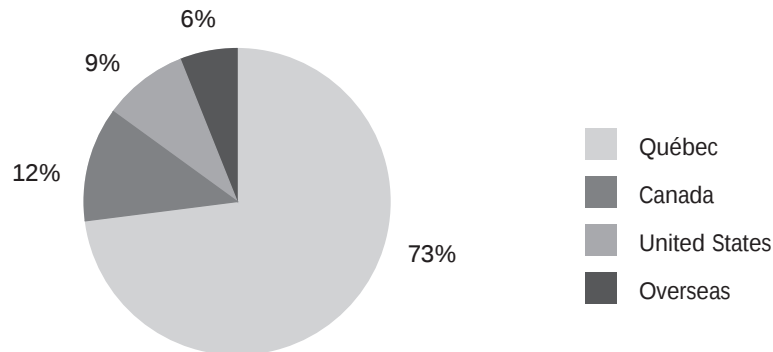
■ 1996: strong performance in overseas markets

Preliminary results for 1996 show that growth held steady, although the results obtained for Québec as a destination varied:

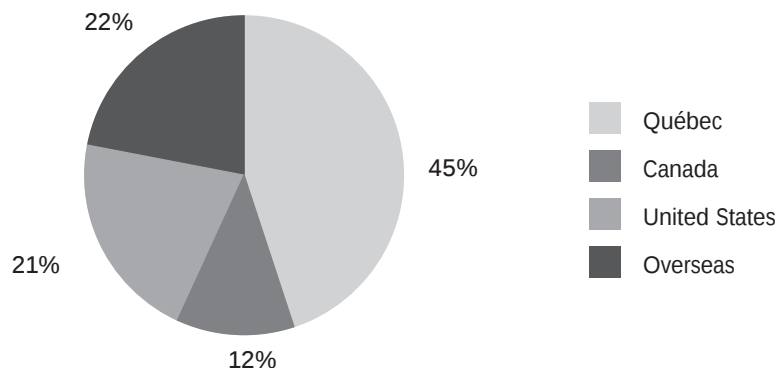
- For overseas markets, the strong growth observed since 1993 continued. Number of tourists and revenue rose by 13% and 12% respectively.
- For the American market, tourism revenue increased by 15% due mainly to an extension of the average length of stay. However, the number of tourists dropped by 1%. The presidential election and the Olympic Games explain this slight falloff.
- For the Canadian and Québec markets, the results of the Canadian Travel Survey, carried out by Statistics Canada, will not be available until the summer of 1997. However, CTRI forecasts indicate a 3% growth in volume and a 5% growth in revenue.

As a result in particular of the strong showing of international markets, Québec's tourism deficit fell by \$100 million and is now at \$458 million. Overall, the number of international tourists in Québec in 1996 grew by 3.8%, which is slightly below the world performance of 4.6%. However, in terms of international tourism revenue, Québec's results are better (up 13.5%) than revenue on a world-wide scale (up 7.6%).

Tourism volume in 1996



Tourism revenue in 1996



■ Québec holds its own among competitors

Growth in Québec's share of the Canadian international tourism market is good overall:

- On the American market, Québec is holding its own. From 1994 to 1995, its share of the market increased slightly in terms of volume but fell a little in terms of tourism revenue. Overall, from 1990 to 1995, Québec maintained its position except for a drop of close to one point in tourism revenue. Ontario recorded results identical to those of Québec. British Columbia, on the other hand, noticeably increased its share of the market.
- Québec's share of other international markets grew. From 1993 to 1995, the number of tourists went up by 1.5 points and revenue rose by 2.5 points. Of the four largest Canadian provinces, only British Columbia increased its share of the market more than Québec.

■ 1997: a rather favourable outlook

The economic outlook for Québec's main tourism markets is encouraging:

- in Québec, Canada and the United States, GDP should grow more than in 1995 and 1996; interest rates should remain low, although upward pressure is always possible;
- economic growth in European and Asian markets will be positive world-wide despite the persistence of economic problems in some countries.

This context leads Tourisme Québec to expect for Québec:

- a greater increase in the number of tourists, mainly due to a recovery on the American market and continued growth on international markets;
- growth in tourism revenue similar to that in 1995 and 1996 (7% to 8%).

Moreover, preliminary results for the first two months of 1997 are encouraging:

- the number of international tourists entering Canada via Québec rose by 11%. In comparison, Ontario and British Columbia experienced growth of 6% and 7% respectively. Québec excelled over the other provinces mainly in terms of American tourism;
- trips by Quebecers outside Canada dropped by 4%, which is excellent for the tourism deficit. Québec leads Ontario (down 2%) and British Columbia (up 7%) in this respect.

GUIDELINES

AND OBJECTIVES

► GENERAL MARKETING GUIDELINES

In view of Québec's good performance in the last two years, Tourisme Québec plans to implement the following guidelines in 1997-1998:

- increase its promotion investments on the main growth markets, i.e international markets;
- step up promotional activities among consumers;
- foster the purchase of Québec tourism products through the creation of packages;
- increase commercial partnerships both with the tourism industry and with non-traditional players;
- prospect for new emerging markets.

► GROWTH OBJECTIVES

The growth objectives for Québec tourism revenue in 1997-1998 are broken down by major market:

- Québec : 4%
- Other Canadian provinces : 4%
- United States : 9%
- Other international markets : 12%

MARKETS:

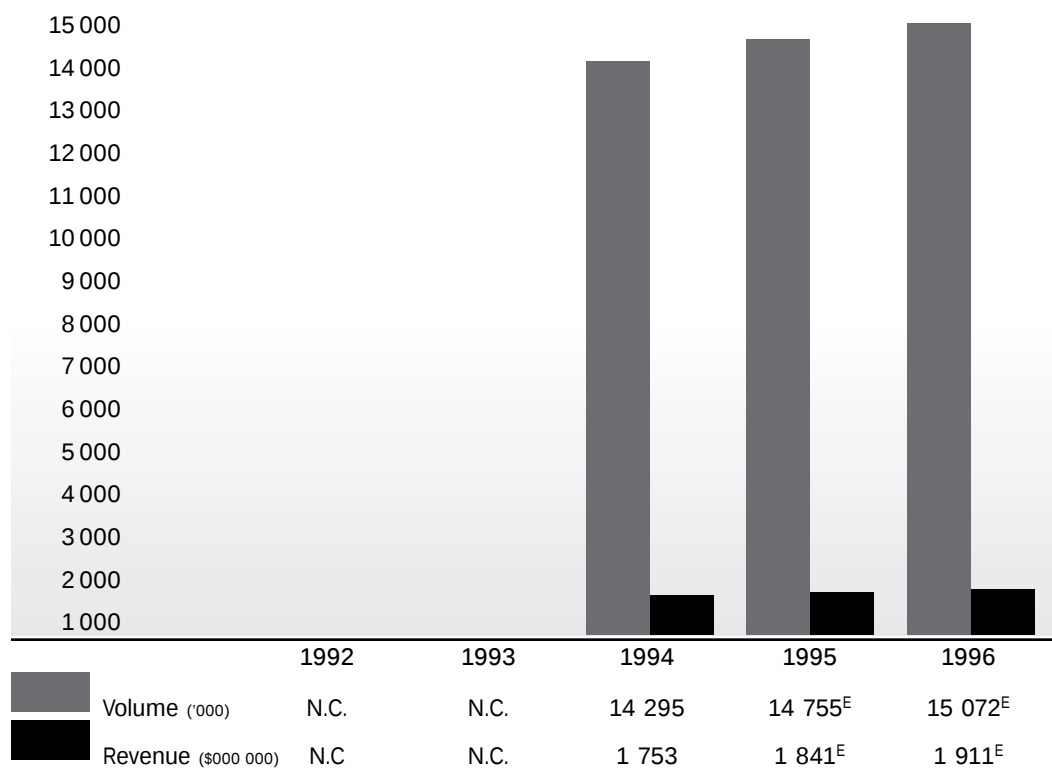
ANALYSIS

AND STRATEGIES

► THE QUÉBEC MARKET

73% of Québec's tourism volume in 1996
45% of Québec's tourism revenue in 1996

Market



N.C. Because of a change in methodology, the data cannot be compared with data of subsequent years

^E Estimate

■ A loyal but fragile market

The most recent data on the Québec market date back to 1994, the year of the last Canadian Travel Survey. The market had experienced rather strong growth since 1992, particularly because of a significant drop in trips by Quebecers to the United States. An analysis of the change in the

number of rooms occupied in the regions that rely mainly on a Québec clientele and an examination of the number of trips by Quebecers to the United States lead to the following conclusions:

- in 1995, the Québec market grew substantially, mainly because of an exceptional summer;
- in 1996, the Québec clientele decreased, above all owing to difficult weather conditions, both in the winter and in the summer.

The Québec market is of paramount importance for the Québec tourism industry, particularly for tourist regions other than Montréal and Québec City. It is a fragile market, however, where travel decisions are often made at the last minute. These decisions are therefore more heavily affected than on other markets by intangible factors that have a large influence on market performance. In addition, the relative importance of the Québec clientele, particularly in leisure travel, will no doubt decrease because of the strong growth in outside markets.

■ Recent revamping of promotion strategies

Strengths

- Greater and better targeted promotional efforts by the entire industry. The agreement with the Société Radio-Canada served to maximize our publicity and promotion investments as well as those of the regional tourism associations (concentration of purchases during prime time, better rates).
- Improved vacation packages for certain products (city tours, resorts, alpine skiing).
- Awareness of the new publicity campaign "Besoin de vacances" (Need a vacation?): 63% of the people surveyed said they knew of the campaign; this is an exceptionally high rate.
- Greater participation by the distribution network (wholesalers and travel agencies) in the sale of Québec tourism products.
- Growing interest by non-traditional partners (Visa Desjardins, Hydro-Québec, Rôtisseries Saint-Hubert, Québécois) in tourism promotion.
- A hospitality and information service highly appreciated by the clientele.

Potential for improvement

- Coordination of promotional efforts of various partners (Tourisme Québec, regional tourism associations, private sector). Of all the markets targeted by the Québec tourism industry, the Québec market is probably the one where coordination is weakest.
- Marketing of tours, resort vacations, snowmobiling, outdoor adventures, hunting and fishing.
- Promoting new tourism products in order to stimulate the interest of Quebecers in Québec tourism.
- Encouraging customers to decide to buy.
- Over-concentration of travel in summer.

- Print ad for promotional campaign on the Québec market



- A favourable context in 1997 tempered by persuasive campaigns by competitors

Opportunities

- The rate of growth of the Québec economy in 1997 will exceed that of 1996, according to forecasts.
- Adoption of Bill 76 creating the Fonds de partenariat touristique. The Québec government offers tourist regions the possibility of collecting an accommodation tax and using the revenue obtained in this way to promote tourism. This financing tool could enable tourist regions that rely heavily on Québec tourists to increase their promotion investments considerably.

Constraints

- The Canadian Tourism Commission and New Brunswick campaigns (the latter amounting to \$1.3 million) on the Québec market may influence the decision of Quebecers who had planned to take their vacation in Québec.
- The unpredictable nature of the travel behaviour of Quebecers. In 1996, trips by Quebecers outside Canada increased by 3% after three years of decline.
- The delay in implementing the accommodation tax means that this measure will have little effect in 1997.

- Strategies and priorities for action

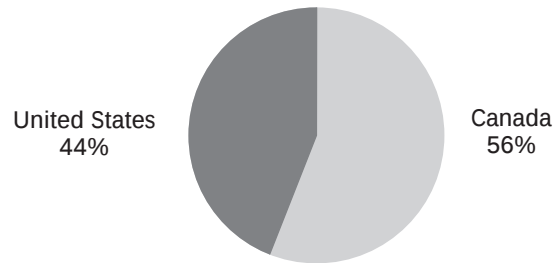
- Build on the media impact of the publicity campaign. The Radio-Canada TV campaign under the theme "Need a vacation?" will be maintained.
- Increase public knowledge of Québec's tourism supply:
 - the televised message will include more pictures of regional tourism products;
 - the television series *Le Martin trotteur*, which promotes Québec tourism supply, will be prolonged (13 shows instead of 10) and its content will be reviewed and improved;
 - a bi-weekly newsletter will be published for the Québec tourism press. The goal is to organize 10 group tours and 40 individual tours.
- Continue the strategy designed to spread demand over the year. The publicity campaign will be extended over three seasons: summer, fall and winter.
- Encourage consumers to make a purchasing decision. A promotion campaign will complement the publicity campaign. A vacation package guide prepared by CAA-Québec and Kilomètre Voyage will be mailed to one million consumers.
- Step up efforts in the ACTA Vacances Québec network.

► THE NORTH AMERICAN MARKET

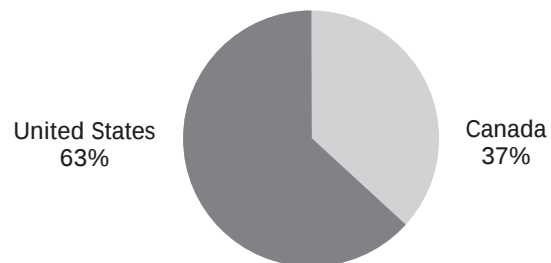
21% of Québec's tourism volume in 1996
33% of Québec's tourism revenue in 1996

Internal breakdown of volume and revenue in 1996

Tourism volume in 1996



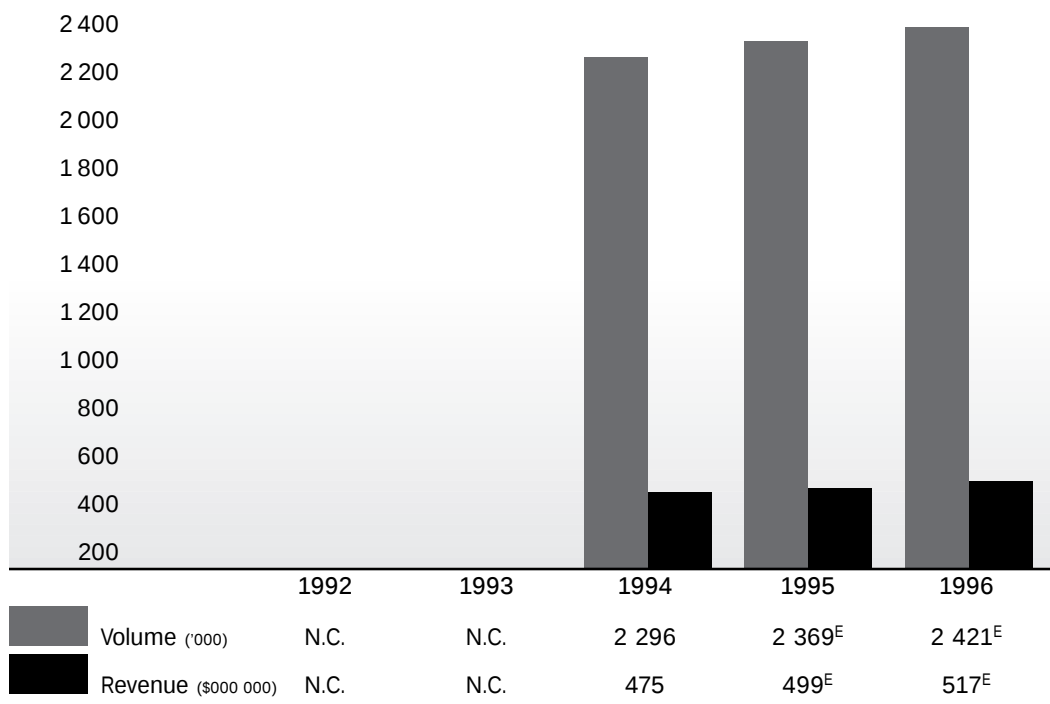
Tourism revenue in 1996



The Canadian market

56% of North American tourism volume in Québec in 1996
37% of North American tourism revenue in Québec in 1996

Market



N.C. Because of a change in methodology, the data cannot be compared with data of subsequent years

^E Estimate

■ A market generally dominated by Ontario

- The other Canadian provinces constitute Québec's second largest tourism market in terms of volume. In terms of expenditure, however, the Canadian market is in fourth place, after Québec and foreign tourists.
- Of all the outside markets targeted by Québec, this is nevertheless the one where the tendency to travel in Québec is strongest.
- The behaviour of Canadian tourists is characterized by the large number of visits to friends and relatives.
- Ontario provides by far the most Canadian visitors to Québec: these visitors account for 80% of the tourists and over 65% of total expenditure by Canadians in Québec.
- Quebecers, however, show just as strong a tendency to travel in Ontario, where they account for 81% of Canadian tourists. Their spending equals 63% of total expenditures by Canadians traveling in Ontario.
- Tourists from other provinces make a few more person/trips in Québec than Québec tourists make elsewhere in Canada. Québec nonetheless has a travel deficit with Canada of \$33 million because Quebecers spend more elsewhere in Canada than other Canadians do in Québec.

■ Promotion strategies based on customer loyalty

Strengths

- Québec has a good reputation throughout Canada, particularly in Ontario, because it is close and has good quality tourism products, especially skiing, city tourism and resort vacations.
- In addition, the proximity of Québec makes it easier to sell short, frequent visits, which Ontarians particularly enjoy.
- The fact that Québec has a tourism office in Toronto, the size and economic importance of that city and the ease of travel to Montréal (one hour by plane, five hours by road, four hours by train) are all factors in Québec's favour.

Potential for improvement

- The low level of promotion investment at a time when the Ontario public, one of the richest in Canada, is widely solicited by competitors.
- Increased competition from Toronto and Vancouver as destinations for business decision-makers.
- Promotion of specific tourism products.

■ Québec must be more active in the future

Opportunities

- Alpine skiing, city tourism and resort vacations are always popular among Ontario tourists. They are very competitive products.
- The vacation package booklet is likely to encourage Ontarians to make a purchase. Trips to Québec by Ontarians are often the result of last-minute decisions.

Constraints

- The open skies policy and a foreseeable increase in the value of the Canadian dollar may bring about major changes in the travel habits of Ontarians.
- Little variety in the tourism products offered Ontarians.

■ Strategies and priorities for action

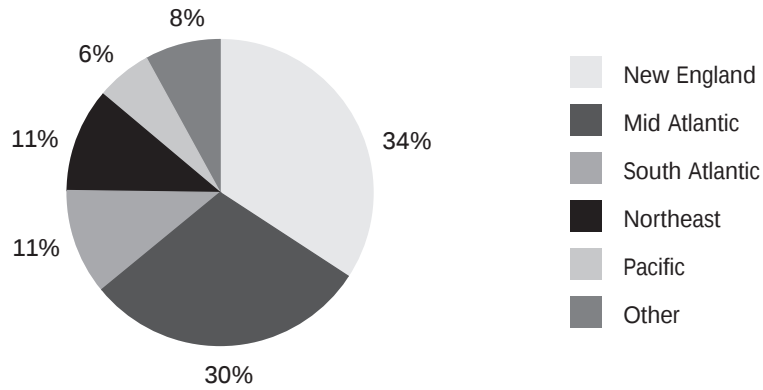
- Increase Québec promotion investments in Ontario. A \$400 000 publicity campaign will be conducted in Toronto (\$300 000 for the winter campaign and \$100 000 for the summer campaign).
- Offer concrete purchasing suggestions to Ontario consumers. Direct mail advertising in Toronto and bordering markets by the Société des fêtes et festivals, involving 1 000 000 copies of a pamphlet emphasizing products such as city tourism and tours, is part of this strategy.
- Support wholesalers, particularly for the distribution of ski trips as a product.
- Hire a canvasser for tour operator clientele, convention products and incentive tours.

The American market

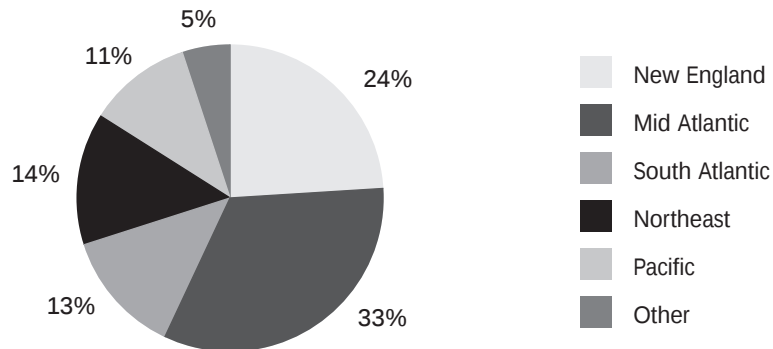
44% of North American tourism volume in Québec in 1996
63% of North American tourism revenue in Québec in 1996

Internal breakdown of volume and revenue in 1996

Tourism volume by submarket

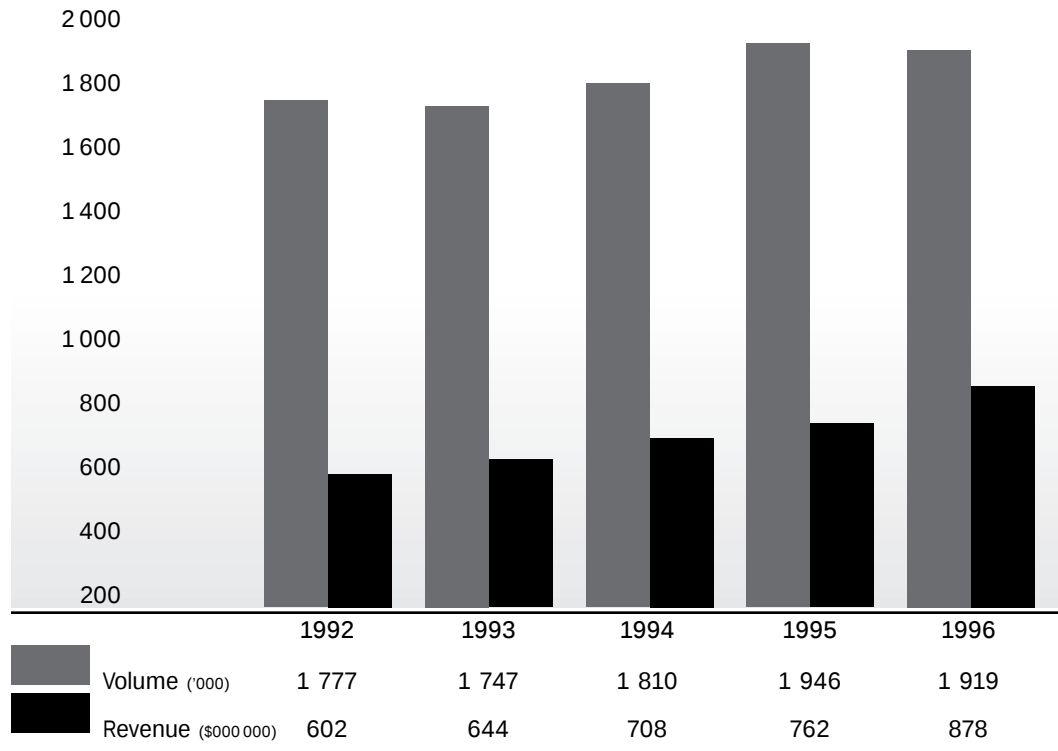


Tourism revenue by submarket



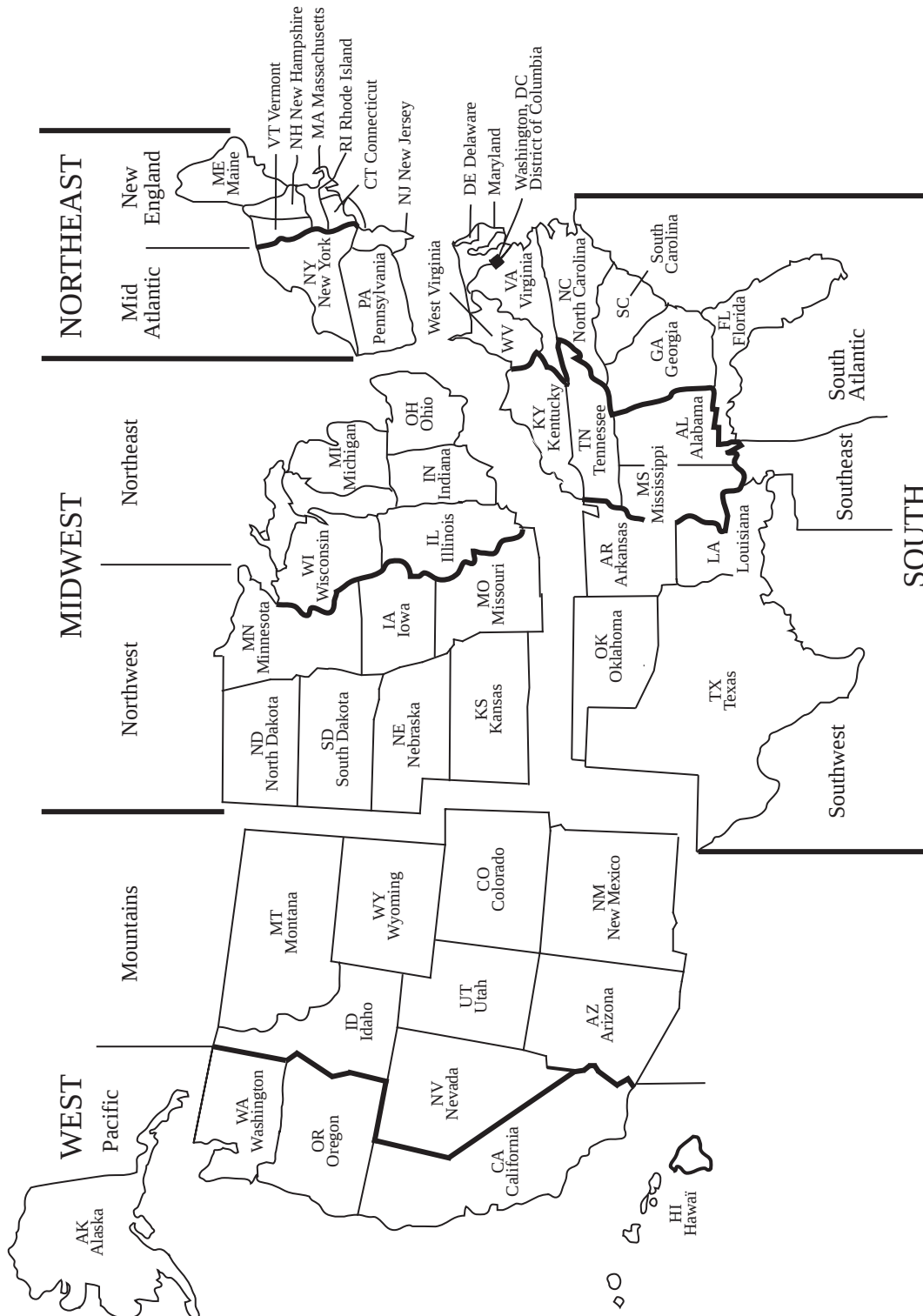
■ A demanding market despite strong growth in revenue

Market

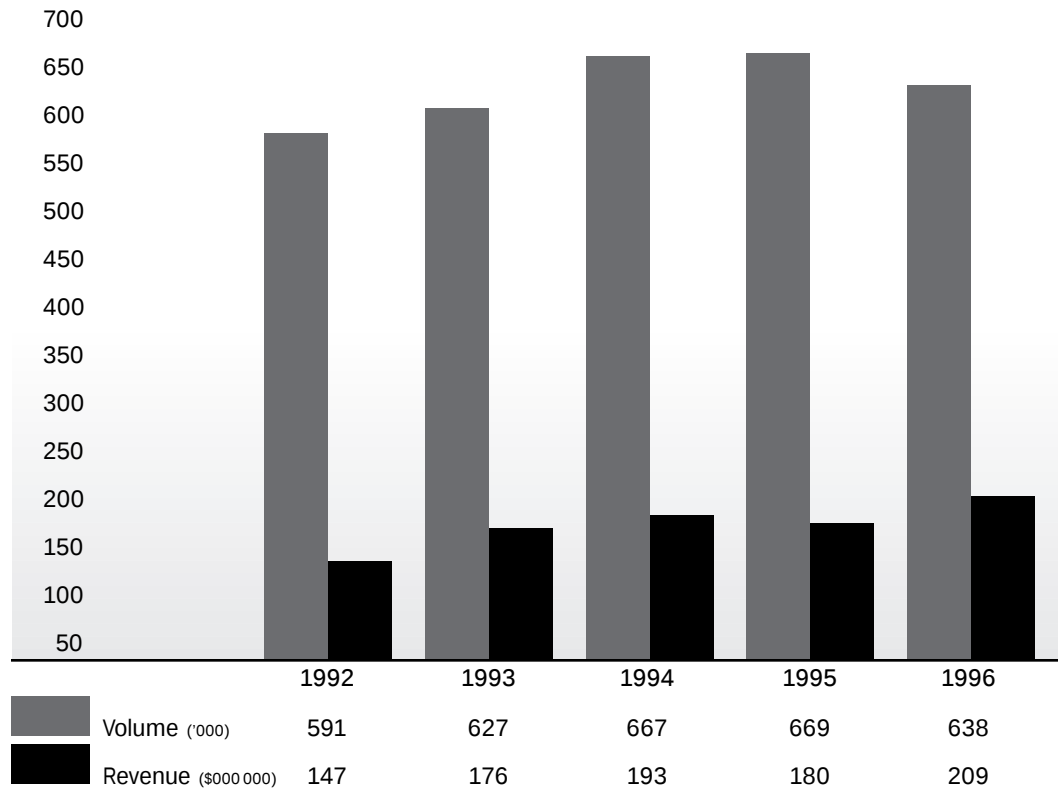


- Following a downturn from 1991 to 1993, 1994 and 1995 were excellent years for American tourism in Québec: both number of tourists and tourist expenditures increased. However, 1996 saw the number of tourists slip back slightly despite a strong rise in revenue.
- Despite major investments in the American market by Tourisme Québec, Québec welcomed only 3% more American tourists in 1996 than in 1990. This stagnation is not particular to Québec, however. It is also the lot of most other Canadian destinations.
- The greatest increase in the number of American tourists in Québec since 1990 occurred in 1995 when Québec welcomed 136 000 more American tourists than in 1994. Half of this growth can be traced to distant submarkets such as the South Atlantic and Pacific regions. This phenomenon illustrates the large growth potential of these submarkets for Québec.
- Despite the drop in the number of visitors, expenditure rose by 15.2% in 1996. According to Statistics Canada, this was due to an increase in the length of visits.
- The proportion of leisure tourists traveling by plane is increasing: it rose from 22% in 1992 to 28% in 1995.

■ Map of American geographic submarkets



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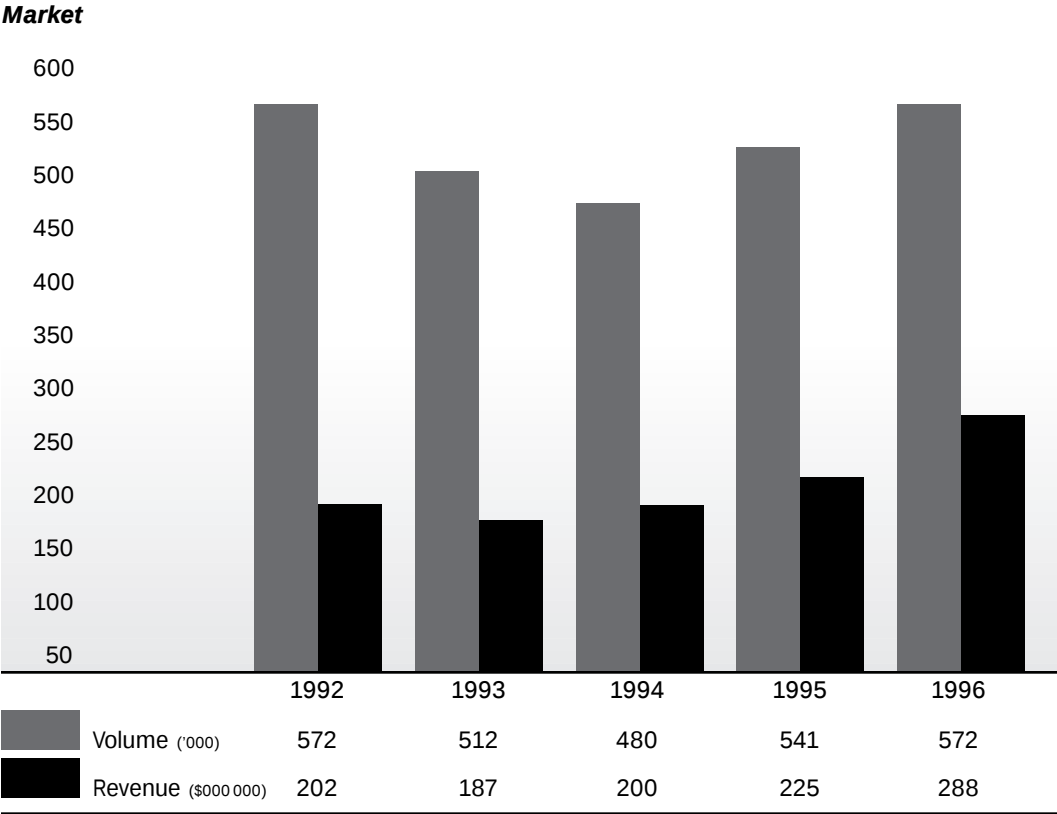
New England*Maine, Rhode Island, Massachusetts,
Connecticut, Vermont, New Hampshire***Market**

- New England is Québec's largest American submarket in terms of volume. It is the only American region that has more visitors to Québec than to Ontario.
- This region grew considerably between 1992 and 1994, but growth stopped in 1995. Spending in Québec dropped (7%) between 1994 and 1995 when average length of visits and average expenditure per visit fell.

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Mid Atlantic

New York, Pennsylvania,
New Jersey

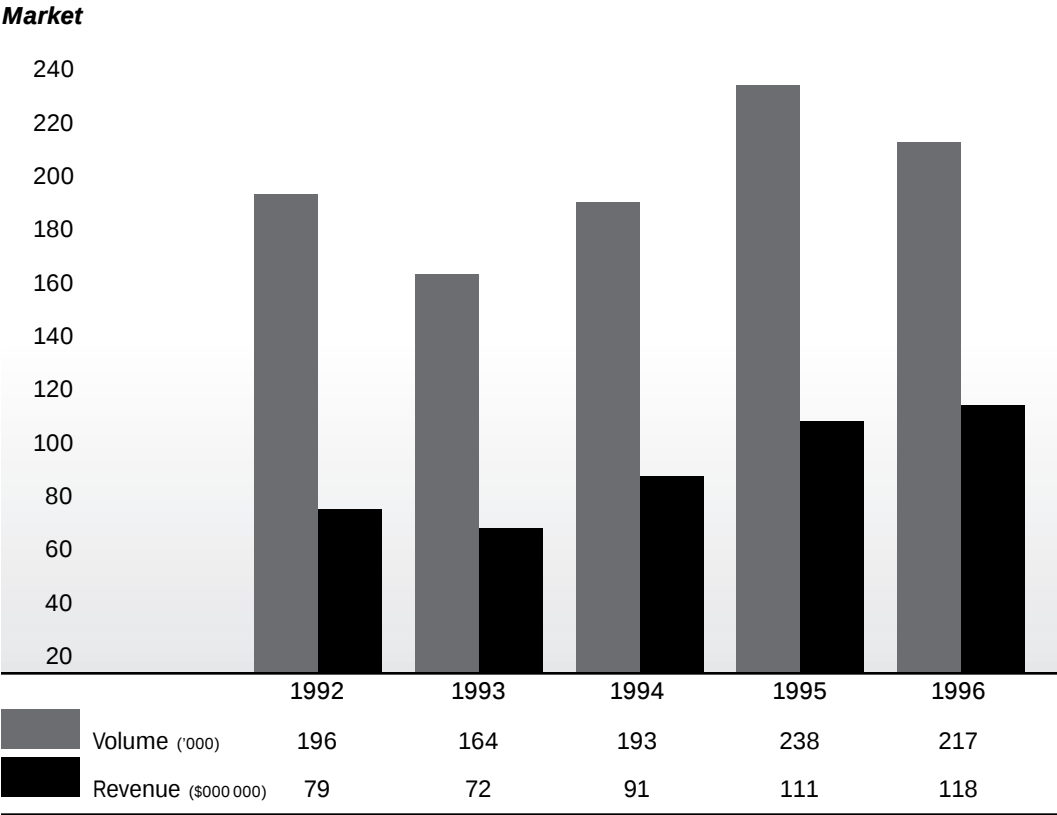


- Mid Atlantic is the largest submarket in terms of tourism revenue. It alone accounts for close to 30% of all expenditure by Americans in Québec. It comes second in number of tourists.
- Ontario is our biggest Canadian competitor. In 1995, Ontario had 69% of this submarket, compared with Québec's 18%.
- Compared with other American regions, this submarket underwent a major decline between 1992 and 1994. Between 1994 and 1996, it regained much of the lost ground. Overall, since 1990, its relative importance has been falling.

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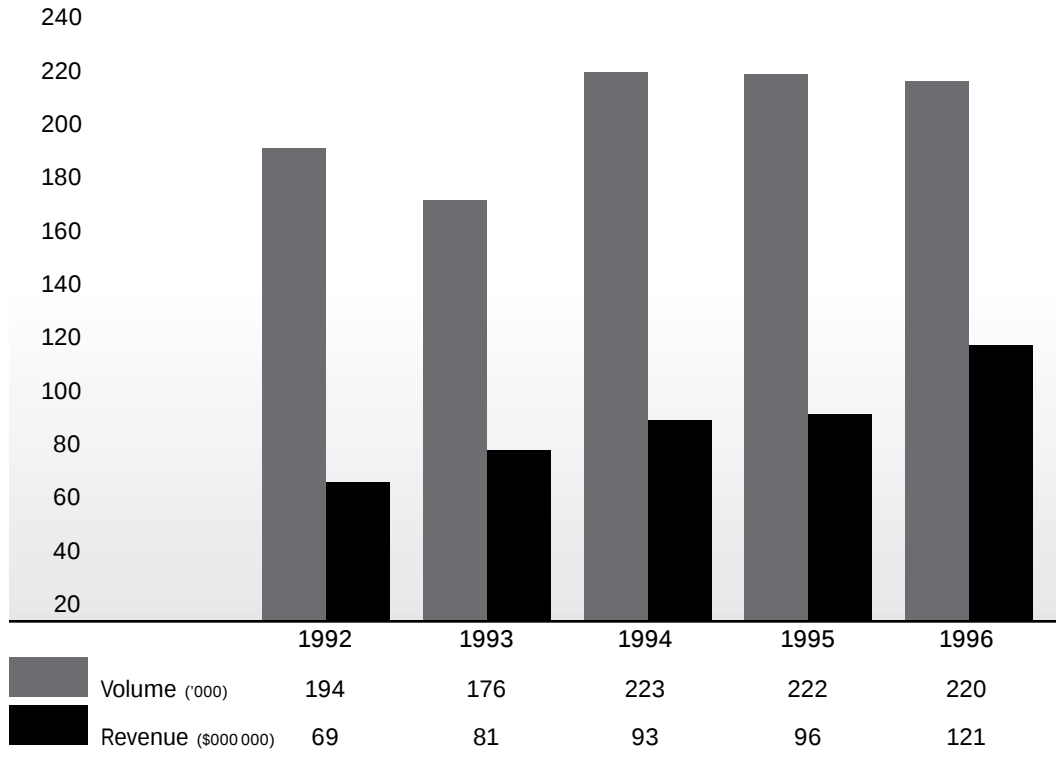
South Atlantic

Maryland, West Virginia, Florida,
Virginia, Georgia, District of Columbia,
South Carolina, Delaware, North Carolina



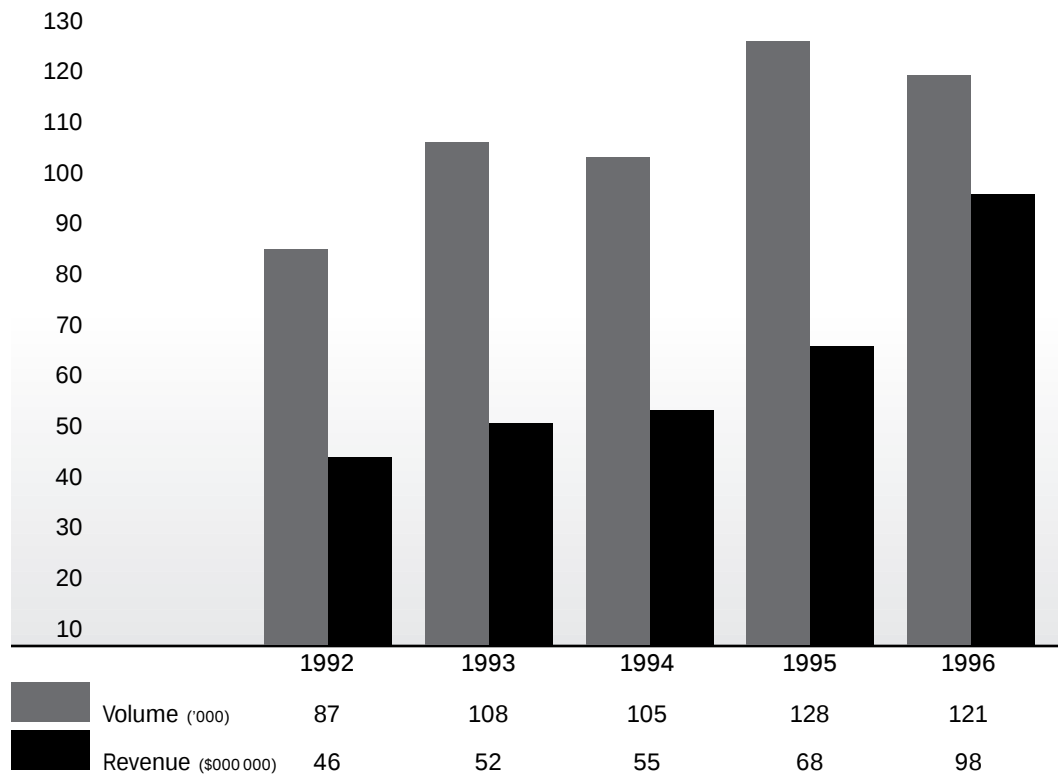
- This submarket experienced strong growth between 1993 and 1995, in terms of both number of tourists and revenue. This growth enabled Québec to recover the market shares it had lost to Ontario from 1990 to 1993. In 1996, however, South Atlantic, host to the Olympic Games, was the region with the biggest drop in visits to Québec.

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Northeast*Wisconsin, Michigan, Illinois,
Indiana, Ohio***Market**

- Northeast is one of only two submarkets that sent more tourists to Québec in 1996 than in 1990.
- This submarket is as big as South Atlantic, although, unlike South Atlantic, it did not grow much between 1994 and 1996 in terms of volume. The strong growth in revenue in 1996 is nevertheless a point in its favour.
- Tourists who come to Canada from this region visit Ontario principally (80%). Québec's share of the market is only 6%.
- Compared with the United States as a whole, tourists from Northeast travel by plane rather than by car, travel mainly in the spring and summer and travel more often for business and conventions.

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Pacific*California, Oregon, Washington***Market**

25

- The Pacific region is one of the two submarkets that sent more tourists to Québec in 1996 than in 1990.
- During the past five years, growth in the number of visitors to Québec was greater in this region than in any other (+39%). The increase in revenue from 1994 to 1996 is also noteworthy (+78%); the Pacific region is far ahead of all other American regions in this regard.
- Québec's share of the market compared with the rest of Canada is only 5%, far behind Ontario (12%) and British Columbia (71%).

- The need to reorient promotion strategies on all American submarkets

Strengths

- Partnerships with Québec and American organizations are growing in number as a means of promotion (regional tourism associations, Air Canada, AT&T, Hertz, CP Hotels, Northwest Airlines, Radisson, Certified Tours, Liberty, Collette Tours, USTOA).
- Partnership with the Canadian Tourism Commission: the \$2.2-million contribution by the Commission in 1996-1997 enabled Tourisme Québec to extend its publicity campaign and to advertise in a greater number of media.
- The production of two vacation package booklets (summer and winter) since 1995 makes the purchase of Québec tourism products easier for American consumers.
- Greater awareness by the American distribution network of Québec's tourism supply thanks to a monthly fax sent to over 10 000 travel agents (Québec Travel Info).
- Better targeted publicity. Tourisme Québec's media strategy bears fruit: the amount of the publicity investment per request for information is dropping.
- A large customer file for direct marketing purposes (250 000 mailings per year).
- The dynamic nature of press relations: the publicity value of features on Québec rose to \$31 million in 1996-1997.
- Convention market: broad solicitation of American associations by Tourisme Québec's partners (Montréal and Québec City convention bureaus and offices).
- Redeployment in 1996 of Tourisme Québec's canvassers in the United States in order to better target distant growth markets. Tourisme Québec can now count on canvassers in Chicago, Dallas and Los Angeles as well as New York City. Canvassing and promotion on the New England market are based in Montréal.
- Better customer service for Americans requesting tourist information on Québec, due to a reduction in mailing time.

Potential for improvement

- Tourism products offered primary market clientele. Nature tourism products are poorly positioned.
- Exploitation of distant markets (air sector).
- Creation of a data base on business clientele (convention and business meeting market).
- Knowledge of clientele.
- Exploitation of certain niches in an increasingly segmented market. There is a high degree of repeat business among the American clientele. This threatens Québec's long-term performance on this market.
- The interest of the Québec tourism industry for this market.

- Print ads for the promotional campaign on the American market



- A market with still more room for growth for Québec

Opportunities

- Tourisme Québec estimates for 1997 point to:
 - resurgence in number of American tourists in Québec;
 - noticeable increase in revenue thanks to more intense promotion on distant markets. Clienteles from these submarkets spend more in Québec.
- The strength of the American dollar is a big plus for Québec's competitiveness, but this advantage is not fully appreciated by the clientele.
- Extensive fragmentation of markets and the emergence of new clientele segments, particularly:
 - Hispanics (9% of the American population, demographic growth equal to 53% between 1980 and 1990);
 - Black Americans (12% of the American population, strong growth in Black middle class);
 - Gays (18.5 million well-educated people with a high discretionary income; 14% travel abroad once a year compared with 4% of Americans overall);
 - Seniors (53 million in 1991, an anticipated 75 million in 2000; make heavy use of travel agencies and attach a great deal of importance to safety).
- Québec's diversified tourism supply. Québec is able to fill various market niches.
- The open skies agreement will make it possible to improve air service between Montréal and American cities, which is essential for exploiting distant markets.

Constraints

- The United States is the largest source of tourists in the world. As a market, it is highly solicited by all tourism destinations.
- Americans have a marked preference for Montréal and Québec City. The other tourist regions suffer because they are not well known.

- Strategies and priorities for action

Two promotional campaigns for pleasure tourism (summer-fall and winter) will be carried out with a view to:

- Emphasizing our presence in the South Atlantic, Northeast and Pacific regions.
- Maintaining our presence in the New England and Mid Atlantic regions.
- Taking greater advantage of the potential for ecotourism.
- Increasing with our partners our visibility in daily newspapers. In order to better exploit distant markets, cities with a direct air link to Montréal will be the main target.
- Making agreements with the distribution network in order to attract the air travel clientele.
- Directing ad placement toward the national media.
- Using a new slogan, "You will want to take it home with you", to encourage consumers to ask for the vacation package booklet.

- Targeting the 35-to-54 age group in the northeast markets and the 55-or-over age group in distant markets.
- Participating in more consumer shows.
- Stepping up press relations.
- Organizing promotions for consumers in Boston and New York, to which the tourism industry will be invited.
- Organizing trade missions to New York, Dallas and Chicago.

For business tourism, Tourisme Québec plans to:

- Carry out a promotional campaign with its partners.
- Make greater use of telemarketing and emphasize corporate meetings and incentive tours in canvassing efforts.
- Set up a data base to better monitor canvassing for the incentive tour and business meeting markets.

Tourisme Québec's publicity investment on the American market will be \$4.6 million in 1997-1998, compared with \$3.6 million in 1996-1997. Tourisme Québec's partners will contribute a further \$4.25 million for a total investment of \$8.85 million. These investments will be broken down as follows:

- Summer-fall : \$3.8 million
- Winter : \$4.1 million
- Business : \$0.950 million.

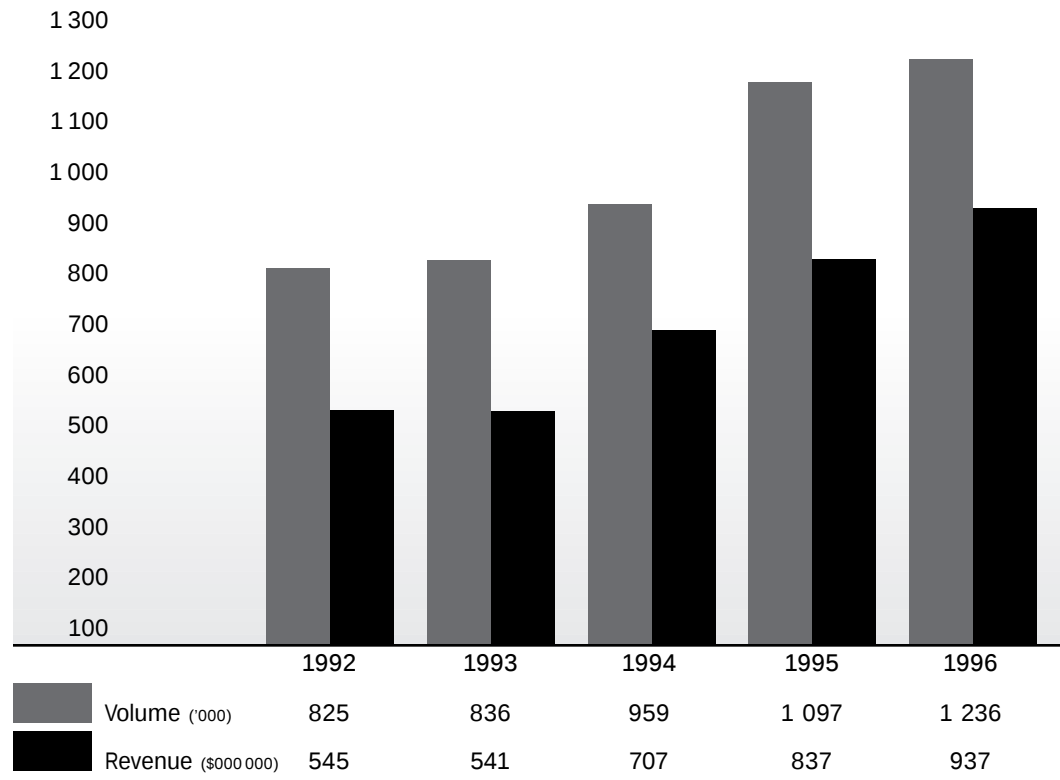
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► OTHER PRIORITY INTERNATIONAL MARKETS

6% of Québec's tourism volume in 1996
22% of Québec's tourism revenue in 1996

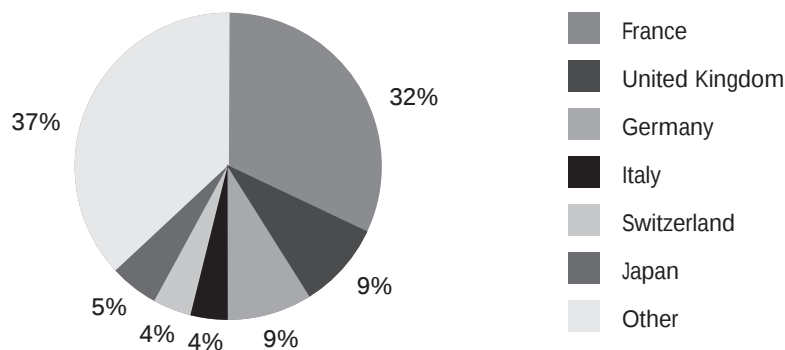
These markets include France, the United Kingdom, Germany, Italy and Japan. This is the category of market where Québec has experienced the greatest growth since 1992.

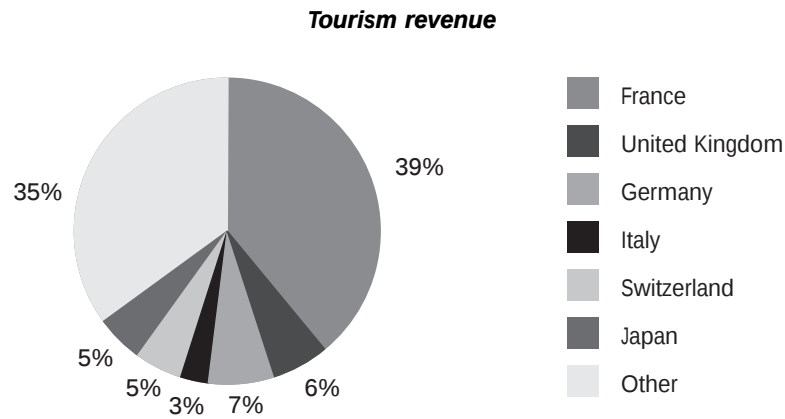
Market



Internal breakdown of volume and revenue in 1996

Tourism volume

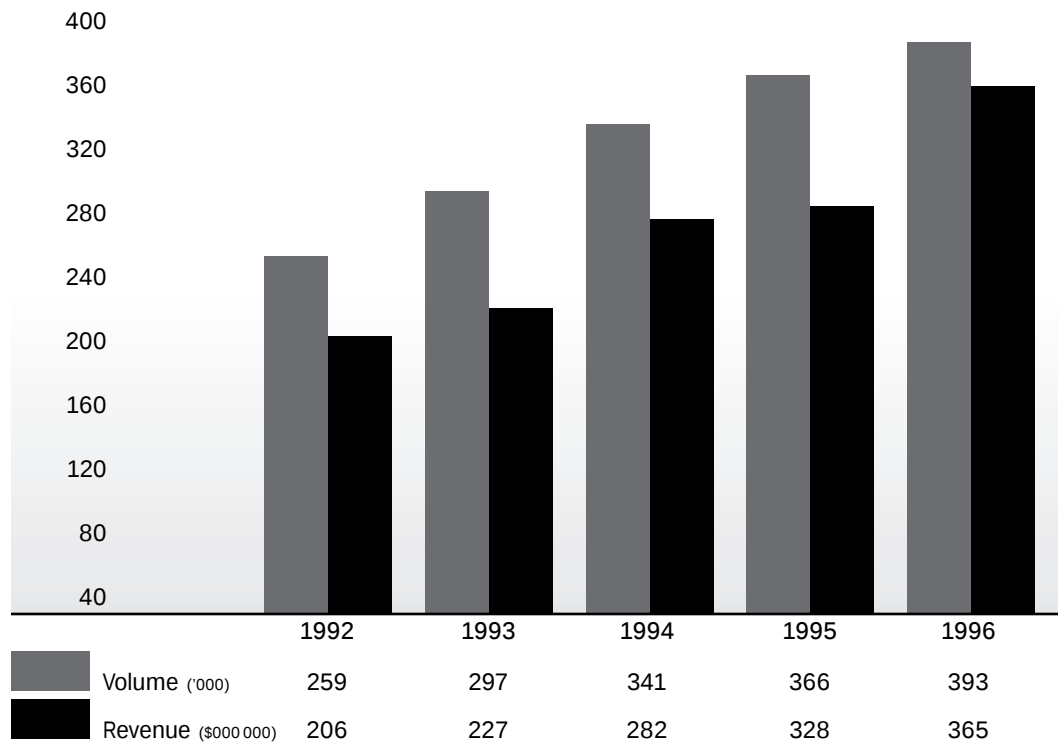




France

32% of tourism volume from Québec's other international markets in 1996
39% of tourism revenue from Québec's other international markets in 1996

Market



- The tourism market with the strongest growth in the past 10 years
- The French market is the largest European market in Québec. The number of visitors and revenue have not stopped growing since 1990. In 1995, this market accounted for one third of visitors and close to 40% of expenditures by international clientele other than Americans.

- Québec is maintaining its dominant position in Canada in terms of the French clientele: Québec's share of the market grew by five percentage points between 1993 and 1995.
 - French tourists are a lucrative clientele since they make long stays in Québec (average of 10 nights).
 - A large portion of the French who visit Québec (60%) live outside Paris.
 - The French who visit Québec behave differently from other international visitors:
 - half of them stay in at least two different kinds of accommodation during their visit, compared with 28% for other international tourists;
 - they more often visit regions outside Montréal and Québec City;
 - growth in this clientele is seen in all seasons, not only the summer.
- A group effort resulting in multimedia promotional strategies

Strengths

- Excellent visibility for Québec thanks to multipromotional campaigns (posters, print media, radio, television).
- Strong interest of journalists in Québec as a destination.
- Consumer satisfaction in terms of services introduced: Freephone, fulfilment house, Minitel, Internet.
- High visibility in French regions and satisfaction of tour-operator partners thanks to the Québec-Express exhibition train.
- Good partnership with the French distribution network.
- Introduction of media coverage for fall (Indian summer) and winter (snowmobiling) products.
- High interest of the Québec tourism industry in this market.
- Good media visibility for Québec in the French tourism press (media spin-off of \$4.3 million in 1996-1997).

Potential for improvement

- Québec's image in joint Canada-Québec publicity campaigns.
- Visibility of consumer information services.
- Visibility of Québec and the Québec industry in women's print media and in trade papers.

- A market that still has growth potential

Opportunities

- Québec has advantages much appreciated by the French clientele: French language and culture, hospitality, a "different" look, wide open spaces, environmental awareness, modern North American conveniences.
- Since Québec is increasingly well known, the French market is opening more and more to individual travel, a clientele that spends more.
- Recently stepped-up promotional efforts aimed at regional clienteles.

Constraints

- Strong competition from other destinations, often accompanied by major publicity campaigns.
- Stepping-up of promotional activities for Western Canada, in cooperation with the Canadian Tourism Commission (CTC), airline companies and certain tour operators.
- Lack of plane seats during the winter season and during July and August. In the three winter months, there are about 5000 seats leaving Paris, over 90% of which are provided by Air France and Air Canada.

■ Strategies and priorities for action

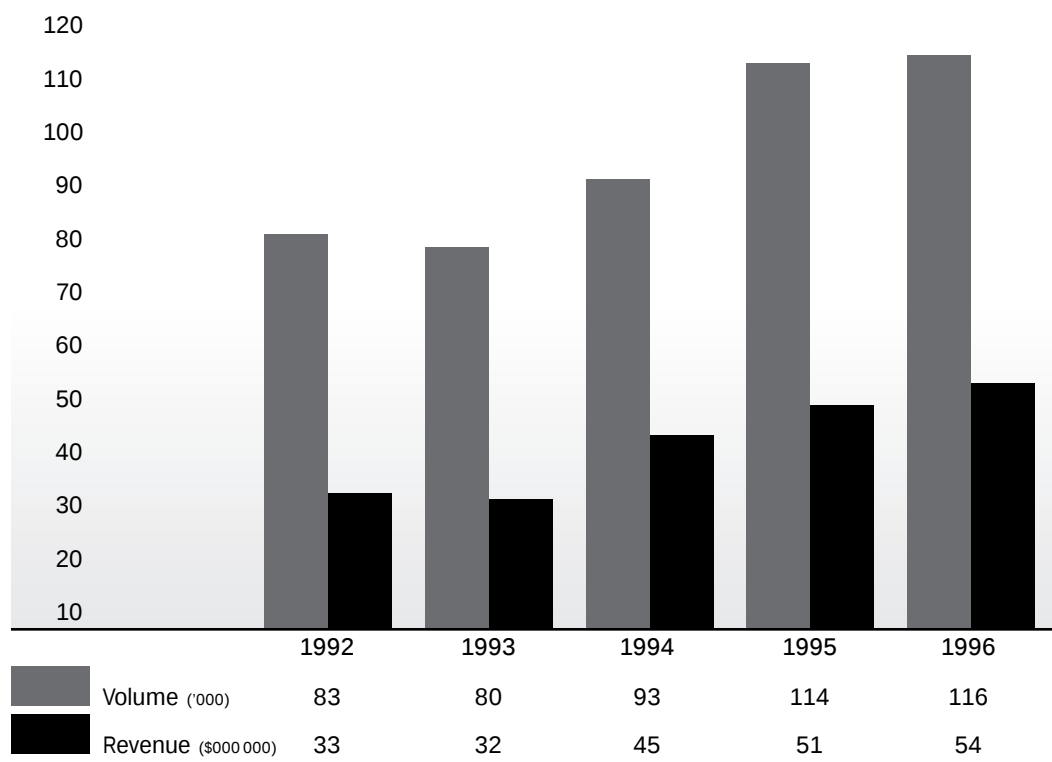
- Increase Québec's visibility through:
 - publicity campaigns with the Canadian Tourism Commission, carriers and tour operators;
 - press relations (regular press tours and press releases).
- Increase the volume of sales of tour operators by promotions targeting regional consumers and by direct marketing.
- Carry out promotions among consumers and travel agents in the regions, for instance, by introducing the Christmas crèches of Rivière-Éternité to the people of Bordeaux.
- Increase tourism revenue by soliciting clienteles that spend more (incentive tours, snowmobiling) and off-season tourists.
- Maintain a constant presence among producers and distributors through support for trade opportunities arising in the network and personal visits to the larger tour operators and incentive travel agencies.
- Create partnerships, particularly with non-traditional players, to increase the promotion budget.
- In cooperation with the wholesaler Nouvelles-Frontières, carry out a campaign in the main national and regional dailies in May and June and in October and November 1997.
- Televisé two 90-second commercials, one for summer, the other for winter, in cooperation with the Canadian Tourism Commission, Ontario and Air Canada. Tourisme Québec will invest \$200 000 in this \$1.5-million joint promotional campaign.
- Conduct a radio campaign in the regions in cooperation with Air Transat.
- Make Québec better known in the French distribution network by sending a monthly fax to travel agents.
- Increase the participation of the industry in consumer shows.

United Kingdom

9% of tourism volume from Québec's other international markets in 1996
6% of tourism revenue from Québec's other international markets in 1996

- Clearly a growth market

Market



- From 1993 to 1996, the British tourism market in Québec grew 45% in volume and 65% in terms of revenue. This growth, mainly due to the strength of leisure travel, followed three consecutive years of decline (1990-1993).
- This growth enabled Québec to recover the share of the market in Canada that it had lost between 1990 and 1993. Meanwhile, Ontario recorded a drop. However, with less than 10% of British tourism revenue in Canada, Québec is far from exploiting the full potential of this market.
- Very slight growth observed from 1995 to 1996.

- Successful promotional strategies

Strengths

- A wider variety of tour operators are interested in Québec. This new interest is a reaction, in particular, to a certain disenchantment with Western Canada as a destination, which is increasingly saturated in the summer.

- Québec is enjoying a net improvement in its exposure in the British tourism press. The publicity value of media coverage on Québec (\$18 million) grew sixfold in 1996-1997 compared with the previous year, mainly as a result of public relations carried out during a very popular television series. Among the travel reports on Canada, those dealing with Québec won many prizes.
- Partnership with the CTC and other provinces (Ontario, Nova Scotia) proved highly profitable. A 90-second TV commercial prepared with these partners for \$1.2 million (\$150 000 contribution by Tourisme Québec) was broadcast in January. It generated three times more requests for information than expected.
- Québec sellers are increasingly proactive on the British market.
- Québec tourism supply is more and more diversified (city tours, winter products) and targets a younger, more active clientele. Québec's growing popularity as a ski destination among students bears this out.

Potential for improvement

- Canada and Québec are still seen as dull, cold, expensive destinations where there is not much to do. This perception is changing, however,
- Tour operators do not have enough information on new tourism products offered by Québec.
- More airplane seats are required. This need accounts for almost non-existent growth in this market in 1996.

■ A growth trend destined to continue

- The Canadian Tourism Research Institute (CTRI) expects growth in this market to continue in 1997. It is estimated that the number of tourists will increase by 10% and revenue, by 7%.
- The United Kingdom has one of the lowest unemployment rates in Europe but consumers are prudent.
- Long-distance travel has an increasingly large share of the travel market in the United Kingdom.
- In the summer of 1997, Air Canada will increase its seat capacity to Montréal. Canada 3000 intends to do likewise for its chartered flights next winter. The transfer of international flights from Mirabel to Dorval was well received by tour operators.
- Individual trips should increase at the expense of organized trips since this destination is getting better known.
- Some of the products offered by Québec have a bright future: short city breaks, resort vacations in small inns, outdoor activities, winter products. The future is in tailored packages offering a variety of activities. With the arrival of Mont-Tremblant on the scene, tour operators have shown greater interest in the adult skier clientele. The youth segment offers other interesting perspectives (camps).
- The incentive tour segment has evinced a new interest in Québec.

■ Strategies and priorities for action

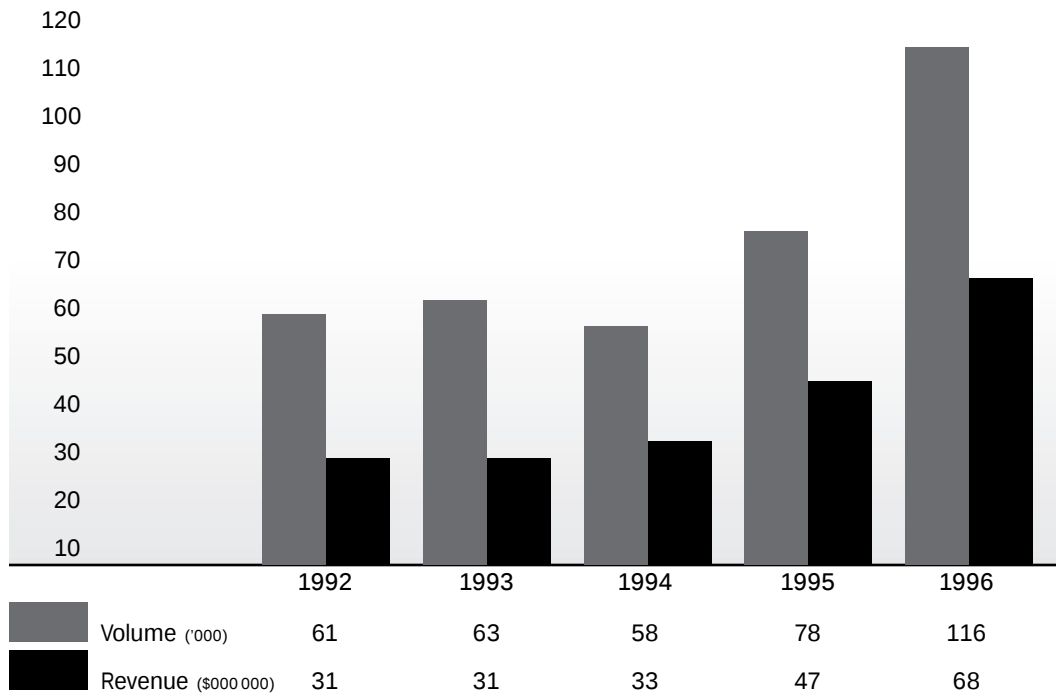
- Maintain positioning activities for the destination, emphasizing PRICE in order to counteract the perception of Canada as expensive. The publicity campaign targeting consumers and the distribution network in the print media will have the theme "More of a holiday for less than you think". In order to promote sales, this publicity will be accompanied by a reply coupon for a free pamphlet on Québec.
- Continue the partnership begun last year with the CTC, Ontario and Nova Scotia. There are plans to produce and distribute a new commercial costing \$1 million (\$100 000 investment by Tourisme Québec).
- Diversify the tourism supply offered consumers. Tourisme Québec will launch a new monthly publication for tour operators on new product in Québec.
- Step up action in the convention and incentive tour sector.
- Increase investments in press relations, given the excellent cost-benefit ratio of this type of promotion. Endeavour to continue positioning Québec in travel shows on television.
- Make use of the fame of Céline Dion by organizing a promotion during her show in London.

Germany

9% of tourism volume from Québec's other international markets in 1996
7% of tourism revenue from Québec's other international markets in 1996

■ The fastest growing European market

Market



- Print ads for promotional campaigns on overseas markets



According to the International Travel Survey by Statistics Canada:

- The German market has recorded record growth since 1994. The strong growth in the number of German tourists in Québec in 1995 continued in 1996. In only two years, this market doubled in tourism volume and revenue. In 1996, Germany became Québec's second largest European market in terms of tourism revenue.
- The 1995 performance enabled Québec to begin recovering its share of the market in Canada (9.5% of revenue from German tourists in Canada). However, this recovery follows on four consecutive years of decline. Québec has not yet recovered the market share lost between 1990 and 1994. Moreover, with less than 10% of German tourism revenue in Canada, Québec is far from exploiting the full potential of this market.

■ Successful promotional strategies despite problematic air service

Strengths

- An active tourism consultant in Düsseldorf. With Nova Scotia, Québec is the only province with direct representation in Germany; this strengthens its image as a destination.
- A growing supply of vacation packages in Québec offered by tour operators, thanks to unceasing canvassing and public relations efforts in recent years.
- Québec is represented by one of the best German press relations agencies. This agency has won the prize for best press relations agency in the tourism sector four times. The publicity value of the articles on Québec in German tourism publications amounted to \$10.5 million in 1996-1997.

Potential for improvement

- The joint publicity campaign with the Canadian Tourism Commission, Ontario, Nova Scotia and German tour operators generated a disappointing number of requests for information on Québec from German consumers.
- The absence of a direct air link between Montréal and Frankfurt hampers growth in this market. With the transfer of international flights from Mirabel to Dorval, Air Canada announced the re-introduction of a regular flight between Montréal and Germany. However, in February 1997, it cancelled its plans following the decision of the Québec Superior Court to suspend the transfer. The recent decision of the Court of Appeal to quash the decision of the Superior Court has already had a favourable effect: Air Canada will establish a Montréal-Frankfurt link twice a week, with a stopover in Halifax, beginning in June.
- Québec's tourism industry could be more visible in this market.

■ A growth market despite a difficult context

- The CTRI expects this market to grow significantly in 1997: 12% in volume, 19% in revenue. Québec will be at a distinct advantage here since Western Canada is saturated in summer (50% of German tourists in Canada visit Alberta and British Columbia). Tour operators have an increased interest in Eastern Canada and Québec (alpine skiing, snowmobiling, special-interest tours).
- The Germans already travel a lot abroad, but a 5% increase in long-distance travel is nonetheless expected by the end of the 1990s.
- Competition will be tough, however, since the German economic situation has deteriorated and Germans are more cost-conscious than ever.

Priorities for action

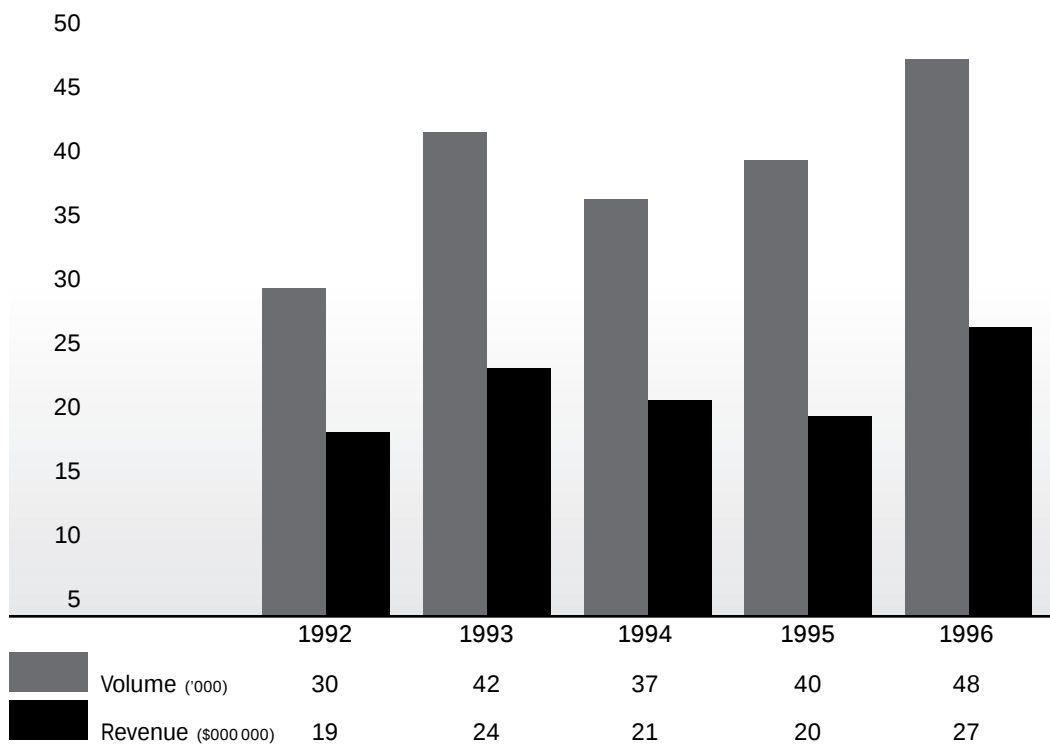
- Stimulate demand during the summer through promotions aimed directly at the consumer. A publicity campaign promoting only Québec will be launched in national magazines and weeklies in early 1998.
- Continue positioning the destination through joint promotions with the CTC and other provinces. Plans for a commercial are being drawn up with the CTC.
- Organize a sales mission bringing Québec sellers together in two major cities in order to better reach tour operators.
- Maintain the level of press relations in view of the major benefits obtained in recent years. Eight individual tours for journalists have already been organized and two filming sessions with television networks are planned.
- Profit from the fame of the Cirque du Soleil by organizing promotions during its shows in Germany.
- Work increasingly with non-traditional partners to promote Québec.
- Prepare for the re-introduction of direct Frankfurt-Montréal flights with the CTC and Air Canada.

Italy

4% of tourism volume from Québec's other international markets in 1996
3% of tourism revenue from Québec's other international markets in 1996

- A highly cyclical market

Market⁽¹⁾



1 Because of the small size of the sampling, the data are indicative only and must be used with caution.

- In recent years, there has been a slight growth in the Italian clientele in Québec. However, statistics portray a fluctuating market where tourist behaviour is difficult to foresee or influence.
- Québec's share of the market in Canada is nevertheless high (about 30%).

- Limited outlook for growth

Opportunities

- The Italians know Canadian destinations well, especially Montréal, Toronto and Vancouver (there is a large Italian community in Québec).
- Interest in winter tourism products.

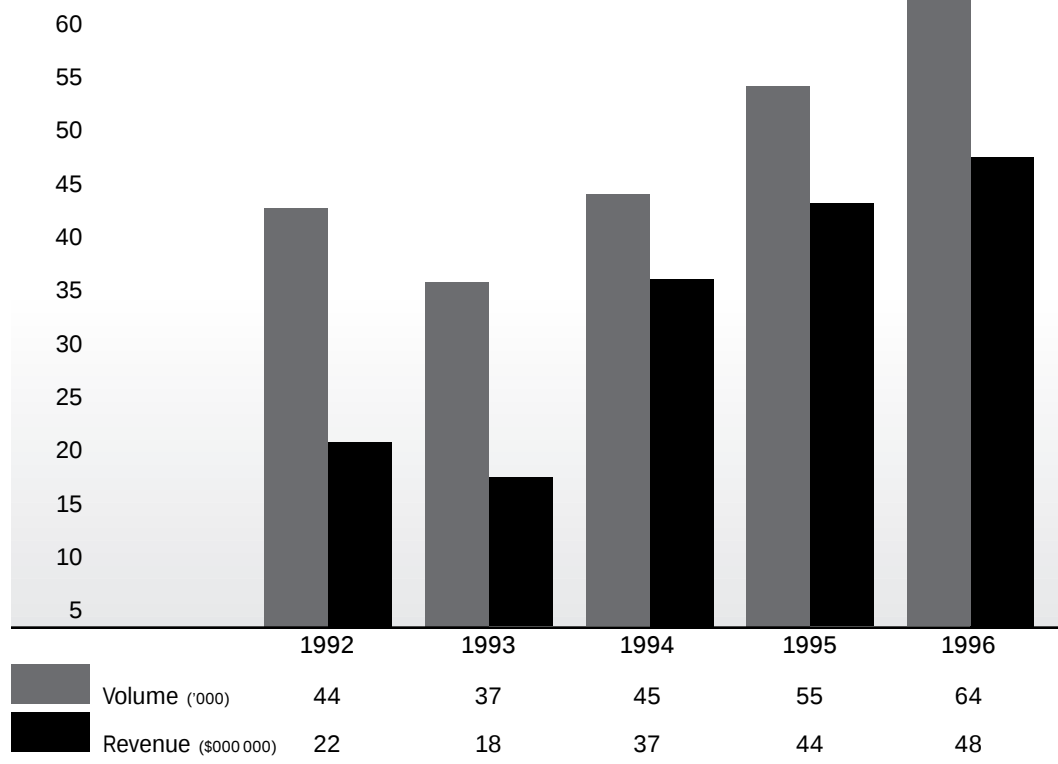
Constraints

- The Italians travel a lot in their own country.
 - Air service with Montréal is poor.
- **Strategies and priorities for action**
 - Join in the publicity campaigns of the Canadian Tourism Commission and air carriers.
 - Support tour operators financially to encourage them to put more Québec tourism products in their programs, especially in winter.
 - Provide more encouragement for journalists to come to Québec.
 - Promote winter tourism through promotional activities.

Japan

5% of tourism volume from Québec's other international markets in 1996
 5% of tourism revenue from Québec's other international markets in 1996

- A lucrative market ready and waiting¹

Market

¹ Because of the small size of the sampling, the data are indicative only and must be used with caution.

- Japan is a fast-growing tourism market: between 1984 and 1995, the number of overseas trips made by Japanese rose from 5 million to 15 million. With tourism expenditures of US\$30.7 billion for overseas travel, Japan comes third after the United States (\$43 billion) and Germany (\$42 billion) for money spent by Japanese abroad.
- The length of stays in Canada is relatively short (5.9 nights compared with 11.3 nights for Europeans) but Japanese spend twice as much per night as Europeans.
- The results obtained by Canada on this market were higher than average: between 1984 and 1995, the rate of growth of trips by Japanese to Canada was almost always higher than that for all overseas trips by Japanese.
- Air service with Canada plays a major role in marketing that targets the Japanese tourist. Currently, Vancouver, Calgary and Toronto are the only Canadian cities with a direct link with Japan. Vancouver is the main gateway into Canada (46%).
- In Québec, the number of Japanese tourists more than doubled between 1985 and 1995, while it tripled for Canada as a whole. Québec's share of the market in Canada is only 7% however, compared with 24% for Ontario.
- Québec's results in 1994-1995 are encouraging. There was a significant increase in the volume of Japanese tourism (42%) and in revenue (30%), which could signal a new departure for this market.

■ A promotional strategy geared to the long term

Strengths

- Québec has had a canvasser on the Japanese market since 1982.
- A certain degree of saturation of the Japanese clientele in Western Canada.

Potential for improvement

- The lack of a direct air link with Montréal is a handicap in marketing the Québec destination.
- Meeting the needs of the Japanese clientele. Japanese tourists are demanding in terms of certain services (cleanliness of accommodations, menus in Japanese, special room requirements, etc.).
- Lack of interest of Québec tourism industry for this market.

■ Excellent outlook despite a difficult context

Opportunities

- The continual increase in Japanese travellers abroad. Although the economy is in a slowdown, a 9% increase in the number of Japanese visiting foreign countries is expected in 1997.
- Major air carriers, such as Northwest Airlines, are increasingly interested in Canadian destinations and offer advantageous rates. This company's hub in North American is Minneapolis, which makes it easier to promote Québec.
- Québec's unique character, owing to the French fact and the history-imbued charm of Québec City. In addition, the Japanese accord a great deal of importance to safety and Québec has a good reputation in this respect.
- Major investments in this market by the CTC and Canadian tourism industry partners (\$11.5 million).
- The appearance of a new clientele, FITs (Free Individual Travellers). In Québec, however, most tourists still prefer organized tours.
- Growth in the Kansai market (the region of Japan comprising Osaka, Kobe and Kyoto) will have a favourable impact on Québec, which provides services in Osaka. This is viewed very favourably in the region.
- Improvement in air links with Toronto (three direct flights a week by Air Canada beginning in mid-June 1997). Continued daily flights into Vancouver.
- Change in behaviour of Japanese consumers in terms of travel purchases: longer stays in the same spot, more off-season trips.
- Japanese companies invest in the Canadian tourism sector, particularly in hotels and resorts across Canada. The main Japanese travel agents have offices in Canada, which is good for the long-term promotion of Canada as a travel destination.
- The purchase of Whistler by Intrawest, the owner of the Mont-Tremblant resort. Whistler welcomes a large number of Japanese, who might be interested in varying their vacation experiences.
- The opening of a second international airport in Osaka, served by Air Canada. With the decision to transfer international flights from Mirabel to Dorval, there is potential for improving air service between Montréal and Japan.

Constraints

- Consumer demand for high quality products at lower prices.
- Strong competition within the Japanese distribution network.
- Strong solicitation of the Japanese market by Québec's competitors (Australia-New Zealand, Europe, United States and China).
- The weakness of the dollar with respect to the yen. Promotional investments to exploit the Japanese market are consequently very expensive.

■ Strategies and priorities for action

- Develop promotions geared to the consumer. Consumers are more aware of their needs and can easily obtain information on destinations. The Japanese Department of Transportation has authorized the sale of organized tours in department stores beginning in June 1997. This will enable more varied market segments to purchase organized tours without difficulty.
- Emphasize the Kansai region. With the introduction of a service base in this region, organizing and participating in activities will be easier.
- Extend stays in Québec. Travellers increasingly prefer to spend more time in the same place and are increasingly choosing new types of accommodation such as resorts and condos. Since Japanese are among the tourists who spend the most during their visits, an extension of their stay would mean major benefits.
- Seek strategic alliances with airlines and other provinces, particularly Ontario, to position Eastern Canada as an interesting destination.

► EMERGING MARKETS

Some countries are experiencing spectacular economic development. With market globalization, a number of these countries are taking off economically, which translates into greater real wealth for a part of the population. The new middle classes want to travel abroad and they are strongly attracted by formerly inaccessible destinations in Europe and North America. All the experts agree that the growth of tourism in the older industrialized countries will depend on their capacity to take advantage of the expansion of these new markets. In order to ensure long-term growth in its tourism industry, Québec must begin to position itself on these markets immediately.

Latin America

The number of tourists in Canada from Latin America grew by 20% between 1993 and 1995. Over two thirds of these tourists visit Eastern Canada, and Québec channels 32% of these into Canada. This market share rose four points between 1993 and 1995, while in Ontario it fell five points. Two national markets dominate this huge continental market: Mexico and Brazil.

- **Mexico** is Canada's and Québec's main Latin American tourism market. It experienced a financial and economic crisis in 1994-1995, which resulted in high inflation, a devaluation of the peso and a 7% drop in GDP. The crisis caused a sharp decline in 1995 in the number of Mexicans visiting Canada. The economic situation picked up in 1996 and the flow of tourists immediately returned to its 1994 level.
- **Brazil** is Canada's and Québec's second largest tourism market in Latin America. The market grew considerably from 1994 to 1996, when the number of Brazilians visiting Canada almost doubled.

Opportunities

- Québec, like the rest of Canada, is perceived as an exotic destination (winter).
- Airline fares for North America are reasonable and connections are increasingly common.
- These tourists travel a lot in the United States: 70% of Brazilians visiting Canada come through the United States.
- Québec and the Latin American countries share Latin roots.
- NAFTA contributes to increased exchanges with Mexico.

Constraints

- Québec is not sufficiently well known on these markets.
-
- Strategies and priorities for action
 - Motivate tour operators to put Québec more frequently in their programs.
 - Make distribution networks aware of Québec tourism products likely to interest clientele in these markets (winter tourism products, city stays).

Pacific Rim countries

- Taiwan: the best short-term growth potential

Trips abroad by Taiwanese grew 600% between 1985 and 1995. In Canada, the number of Taiwanese tourists rose 52% from 1994 to 1995. These tourists make long stays and spend freely.

Opportunities

- Taiwanese tour operators are increasingly interested in Québec and its cultural distinctiveness.
- Western Canada is more and more saturated as a destination, so that Canadian Airlines is looking for a new gateway in the east.

Constraints

- Canada requires Taiwanese tourists to obtain a visa. In addition, the federal government increased the cost of a visa by 80% in 1996. Australia and the United States, on the other hand, are thinking of removing this obligation.
- Québec is far from this market and British Columbia remains the principal gateway into Canada for Taiwanese.
- Tourisme Québec does not have any promotional material in Mandarin.
- The Québec tourism industry is not familiar with the culture and requirements of Taiwanese tourists.

- South Korea: as high a potential as Japan in the medium term

The number of Korean tourists in Canada tripled between 1990 and 1995.

Opportunities

- In 1994, Canada made it easier for Koreans to visit by removing the visa requirement and improving air service with Vancouver and Toronto.
- The main Korean travel agents have offices in Toronto and Vancouver.

Constraints

- Korean tour operators seek the lowest possible prices; this can endanger the quality of the tourism supply.

- Hong Kong: a market with medium-term interest

Opportunities

- The people are well off and sophisticated; they travel a lot abroad and are increasingly interested in Canada.
- Improved air links with Canada.
- When it returns to China on July 1, 1997, Hong Kong will become the gateway for this market, which has the highest growth potential in the world.

Constraints

- Since the distribution network does not offer many vacation packages for Québec, the West and Ontario are more visible.

- Priorities for action

- Make Québec better known in the distribution network, through press relations and information sessions.
- Encourage tour operators to organize more vacation packages in Québec.
- Participate in marketplaces and fairs organized by the CTC in these markets.
- Carry out joint promotions with Tourism Ontario.
- Establish stronger business relations with Asian tour operators with offices in Toronto and Vancouver (hold golf tournaments for instance, where they could meet Québec suppliers).
- Provide information to the distribution network through a semi-annual newsletter translated into Mandarin, Korean and Cantonese.
- Produce a promotional brochure in Mandarin.
- Create a data base on the new Asian markets for the Québec tourism industry.

► MULTI-MARKET PROMOTIONAL ACTIVITIES

Promotional tools and publications

In order to position Québec as a destination, Tourisme Québec produces tourist brochures, support material for promotional activities and promotional tools for the distribution network. The publishing program for 1997-1998 can be found in Appendix 2. The priorities for action in 1997-1998 are:

- Reprints of existing brochures:
 - Vacationing in Québec (design review for March 1998);
 - Accommodations.
- Marketing promotional tools for consumers and business clientele.
- Production of leaflets promoting different winter or summer tours out of Montréal or Québec City. Leaflets offering various tours to market segments with special interests (ecotourism, religious heritage, etc.) will also be produced.
- Production of new publications to support stepped-up promotion of the winter season:
 - a positioning document on winter activities for European markets;
 - a document containing the technical fact sheets for various ski centres for the British market;
 - a positioning document on cross-country skiing for the American market.

Tourist information

Tourisme Québec answers requests for information from tourists and travel agents through:

- telephone information for clientele in North America and France (over 500 000 requests for information a year);
- traditional mail service and e-mail (close to 500 000 mailings a year), including an Internet site;
- across-the-counter information in seven Maisons du tourisme (close to 500 000 requests for information a year).

In 1997-1998, the priorities for action are:

- to continue developing a destination management system (information, reservations), in cooperation with the industry and a private partner;
- to maintain the excellent quality of service. According to an independent study, customer service in Tourisme Québec's tourist information services is among the best in North America.

STRATEGIES**AND PRIORITIES FOR ACTION
BY PRODUCT**

Priorities for action for products and tourism activities in 1997-1998 are as follows:

- preparing an ecotourism strategy;
- preparing a St. Lawrence cruise strategy, including international cruises.

- City stays
 - Create getaway tours leaving Montréal and Québec City for American tourist groups.
 - Maintain support for promotion of tourism events.

- Touring
 - Carry out a direct marketing campaign on the Québec market in cooperation with CAA-Québec and Kilomètre Voyage (mailing a vacation package guide to one million consumers).
 - Support the development and promotion of interregional tours with regional tourism associations.
 - Develop special interest tours.
 - Continue support for the Association des agents de voyages du Québec Vacances-Québec ACTA project, while upgrading promotion among consumers.
 - Continue financial assistance given tourism facilities for fam tours.
 - Continue financial support for the international cruise committee.
 - Support the Société des fêtes et festivals through direct mail advertising in 900 000 Ontario homes; see that this vacation package guide enters the bordering markets in the eastern United States.

■ Skiing

Alpine skiing

- Strengthen the promotion of vacation packages on the Toronto market.
- Strengthen the promotion of alpine skiing on the British market.

Cross-country skiing

- Prepare a marketing plan with the Association des centres de ski de fond du Québec.

■ Resort vacations

- Continue financial support for the Association des relais de santé.
- Create a promotional tool to help develop golf.

■ Conventions, incentive tours and business meetings

- Set up a data base on the American market and give special attention to intensive telemarketing among incentive travel houses and corporations.
- Step up efforts in Europe for the incentive travel segment.

■ Snowmobiling

- Prepare a joint action plan with New Brunswick and Ontario for the promotion of snowmobiling in order to obtain financial support from the Canadian Tourism Commission.
- Make a new video for the International Snowmobile Congress to be held in Québec in 1999.
- Maintain financial support for the Fédération des motoneigistes du Québec.

■ Adventure

- Provide international visibility for Québec during the Seventh World Congress on Adventure Travel and Ecotourism to be held in the Laurentians in October 1997.
- In cooperation with the Canadian Tourism Commission, enhance the plan for marketing the adventure product in the United States.
- Prepare three specific pamphlets for the following markets: France, United Kingdom, Germany.
- Set up an Aboriginal tourism promotion plan in cooperation with the new Grand Nord regional tourism association.
- Provide financial support for the creation of the Association des producteurs de tourisme d'aventure du Québec.
- Participate in consumer shows promoting the adventure product, particularly in the United States and France.

■ Hunting and fishing

Canadian and American market

- Prepare a new vacation package guide
- Help produce new television programs for the Public Broadcasting Service (PBS) and Canadian Sport Fishing.
- Step up advertising in American magazines.

European market

- Prepare and implement a marketing plan for hunting and fishing targeting the European markets.

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POSSIBILITIES

FOR THE **INDUSTRY**

Tourisme Québec offers the tourism industry a number of possibilities for advertising and marketing its tourism products.

► **SHOWS, MARKETPLACES AND FAIRS**

Tourisme Québec offers Québec tourism companies the opportunity to participate in trade missions on the tourism markets targeted by Québec. These missions take place during specialized marketplaces, trade fairs and shows, where Québec firms meet distributors and consumers.

For additional information on these missions, contact one of the following persons, depending on the activity chosen (see table on following pages):

- HF Hélène Fortier, of the Direction du développement des marchés, at (514) 873-7977;
- MG Michel Gagné, of the Direction du développement des marchés, at (514) 873-7977;
- RP Raynald Paquet, of the Direction du développement des marchés, at (514) 873-7977;
- LBP Louis B. Parent, of the Direction du développement des marchés, at (418) 873-7977;
- RP Raynald Paquet, of the Direction du développement des marchés, at (514) 873-7977;
- SW Suzanne Watson, of the Direction du développement des marchés, at (514) 873-7977.

► OVERSEAS, MEXICAN AND SOUTH AMERICAN MARKETS

Country	Activity	Date	City	Client	Resp.*
Germany	Sellers' mission	September 1997 (8th to 12th)	Düsseldorf and Munich	Industry	MG
	International Travel Bourse (ITB)	March 1998 (7th to 12th)	Berlin	Industry	MG
Australia	6 Corroborees	January 1998 (13th to 15th and 19th to 21st)	Perth Adelaide Melbourne Sydney (2) Brisbane	Industry	MG
Brazil	ABAV - Brazilian fair for travel agents	October 1997 (8th to 12th)	Rio de Janeiro	Industry	MG
	BRAZTOA – Brazilian Tour Operator Association	March 1998	Sao Paulo	Industry	MG
Canada	Ontario/Québec Marketplace	September 1997 (28th to 30th)	Mont-Tremblant	Industry	MG
	Rendez-vous Canada	May 1998 (10th to 13th)	Québec	Industry	MG
Spain	Feria Internacional de Turismo (FITUR)	January 1998 (Jan. 28 to Feb. 1)	Madrid	Industry	MG
France	French Grand Prix (Formula 1)	June 1997 (29th)	Magny Cours	Media, Conventions, incentive travel and business meetings, industry	MG
	Partir en hiver (winter vacations)	October 1997 (25th to 27th)	Paris	Consumers	MG
	Atelier Canada	November 1997 (4th to 7th)	Paris	Industry	MG
	3 consumer shows Mahana SMT Rando Expo	March 1998 (6th to 8th) (12th to 15th) (20th to 22nd)	Lyons Paris Paris	Consumers	SW SW LBP
Italy	Borsa Internationale del Turismo (BIT)	February 1998 (Feb. 25 to March 1)	Milan	Industry	RP
Japan	Kanata 1997	October 1997 (12th to 18th)	Tokyo and Osaka	Industry	MG
Mexico	Sellers' mission	October 1997	Mexico	Industry	MG
	Conozca Québec/Canada	April 1998	Mexico	Industry	MG

* Initials refer to the person responsible. Refer to the table on the preceding page for the person's name and telephone number.

► OVERSEAS, MEXICAN AND SOUTH AMERICAN MARKETS (Cont.)

Country	Activity	Date	City	Client	Resp.
United Kingdom	Ski Shows	October 1997	Birmingham London	Consumers	HF
	World Travel Market	November 1997	London	Industry	MG
	U.K. Spotlight Canada	March 1998 (2nd to 4th)	London	Industry	MG
New Zealand	3 Canada Calls	January 1998 (27th to 29th)	Christ Church Auckland Wellington	Industry	MG
Southeast Asia	Showcase Canada	October 1997 (after Kanata)	Hong Kong Taiwan South Korea	Industry	MG
Switzerland	European Incentive & Business & Travel Meetings Exhibition (EIBTM)	May 1998	Geneva	Conventions, business meetings and incentive travel	RP

► NORTH AMERICAN MARKET

CANADA					
Region	Activity	Date	City	Client	Resp.*
Maritimes	Ski Show	Autumn 1997	Halifax, NS or Moncton, NB	Consumers	HF
Ontario	The Travel And Leisure Show	April 1997	Toronto	Consumers	MG
	Ski Group	May 1997	Toronto	Industry	HF
	Canadian Society of Association Executives (CSAE)	July 1997 (12th to 15th)	Hamilton	Conventions, business meetings and incentive travel	RP
	Meeting/Incentive Canadian Trade Show	August 1997	Toronto	Conventions, business meetings and incentive travel	RP
	Toronto Ski Show	October 1997	Toronto	Consumers	HF
	Snowmobile Show	October 1997	Markham	Consumers	LBP
	Ontario Motor Coach Association (OMCA)	November 1997 (2nd to 5th)	Toronto	Industry	MG
	Québec Day	February 1998	Toronto	Conventions, business meetings and incentive travel	RP
	Hunting and fishing show	March 1998	Toronto	Consumers	ML
Québec	Bienvenue Québec	October 1997 (20th to 22nd)	Hull	Industry	SW

UNITED STATES

Region	Activity	Date	City	Client	Resp.*
To be determined	Hunting and fishing show	March 1998	To be determined	Consumers	ML
Mid Atlantic	SkiGroup'97	April 1997 (28th) (29th) (30th) May 1997 (1st) (7th)	Washington, DC Philadelphia, PA Secaucus, NJ New York, NY Pittsburgh, PA	Industry	HF
	Meetingplace	August 1997	Baltimore, MD	Conventions, business meetings, incentive travel	RP
	Québec Marketplace and sellers' mission	September 1997	New York, NY	Industry	HF
	National Ski Show	October 1997 (24th) November 1997 (1st) (7th)	Philadelphia, PA Long Island, NY Washington, DC	Consumers	HF
	Canada Showcase DC	November 1997 (13th)	Washington, DC	Conventions, business, incentive travel	RP
	Canada Showcase NY	November 1997 (20th)	New York, NY	Conventions, business meetings, incentive travel	RP
	Receptive Services Association (RSA)	February 1998	New York, NY	Industry	MG
	Canada Showcase Rochester	March 1998 (1st)	Rochester, NY	Conventions, business meetings, incentive travel	RP
	Québec Marketplace and sellers' mission	February 1998	New York, NY	Industry	MG
	Québec Day	February 1998	New York, NY	Conventions, business meetings, incentive travel	RP
Midwest	Chicago Tribune Shows	1997	Chicago, IL	Industry	MG
	Detroit News Shows	1997	Detroit, MI	Industry	MG
	Showcase Canada	1997	Minneapolis, MN Chicago, IL Detroit, MI Milwaukee, WI	Conventions, business meetings, incentive travel	RP
	Ski Shows	1997	Detroit, MI Chicago, IL Cleveland, OH	Consumers	HF

UNITED STATES (cont.)					
Region	Activity	Date	City	Client	Resp.*
Midwest (cont.)	Québec-Canada Quiz	June 1997	Chicago, IL	Industry	MG
	American Society of Association Executives (ASAE)	July 1997 (26th to 29th)	Chicago, IL	Conventions, business meetings and incentive travel	RP
	IT & ME (Motivation Show)	October 1997 (6th)	Chicago, IL	Conventions, business meetings and incentive travel	RP
	Spotlight Canada	October 1997	Chicago, IL Minneapolis, MN Cleveland, OH Detroit, MI	Industry	MG
	International Adventure Show	February 1998	Chicago, IL	Consumers	LBP
Pacific	Showcase Canada	August 1997 (15th to 20th)	San Francisco, CA Seattle, WA	Conventions, business meetings and incentive travel	RP
	Insurance Company Planners Association (ICPA)	November 1997 (10th to 14th)	San Diego, CA	Conventions, business and incentive travel	RP
	United States Tour Operator Association (USTOA)	December 1997 (9th to 11th)	Honolulu, HI	Industry	MG
	Spotlight Canada	February 1998	Los Angeles, CA San Francisco, CA	Industry	MG
	Adventure Show	March 1998 (3rd)	San Francisco, CA	Consumers	LBP
New England	Québec Ski Day	November 1997	Boston, MA	Industry	HF
	Ski Show	November 1997	Boston, MA	Consumers	HF
	Winter Adventure Shows	January 1998	Boston, MA Hartford, CT	Consumers	LBP
South and Atlantic	Outdoors Show	1997	Dallas, TX	Consumers	LBP
	Showcase Canada	1997	Atlanta, GA Dallas, TX Houston, TX	Conventions, business and incentive travel	RP
	Ski Groups	April 1997 (17th to 29th)	Atlanta, GA Fort Lauderdale, FL Orlando, FL Tampa, FL	Consumers	HF

UNITED STATES (cont.)

Region	Activity	Date	City	Client	Resp.*
South and Atlantic (cont.)	Québec-Canada Quiz	May 1997 (29th)	Dallas, TX	Industry	MG
	National Tour Association (NTA)	November 1997 (7th to 12th)	Tampa, FL	Industry	SW
	American Airlines Fly Away Vacations	November 1997 (19th)	Dallas, TX	Industry	MG
	American Bus Association (ABA)	December 1997 (7th to 12th)	Nashville, TN	Industry	SW
	Meeting Planners International (MPI)	January 1998 (11th)	Orlando, FL	Conventions, business meetings and incentive travel	RP
	Spotlight Canada	February 1998	Nashville, TN Birmingham, AL Atlanta, GA Miami, FL Fort Lauderdale, FL Orlando, FL Dallas, TX Houston, TX	Industry	MG
	Soft Adventure Travel Show	February 1998 (28th)	Dallas, TX	Consumers	LBP

► FINANCIAL SUPPORT FOR MARKETING

The Programme de promotion coopérative (PPC) is designed to stimulate private investment in the marketing of Québec's tourism products, primarily on foreign markets. It promotes an interregional approach. Under this program, Tourisme Québec can grant financial assistance to:

- the Québec tourism industry (promoters of tourism events, receptive wholesalers, sectoral and regional associations, etc.);
- the distribution network on foreign markets (wholesalers, air carriers, agencies, etc.).

Tourisme Québec provides financial assistance for the production of promotional material, publicity campaigns, direct mail marketing and canvassing activities.

For further information on this program, contact *Suzanne Watson*, of the Direction du développement des marchés, at (514) 873-7977.

► FINANCIAL SUPPORT FOR REGIONAL TOURISM ASSOCIATIONS

Tourisme Québec will provide financial assistance of \$7.5 million to regional tourism associations in 1997-1998. This assistance is given regional tourism associations (RTAs) to enable them to fulfill their mission, which is primarily to promote their regional tourism products.

For further information on the promotional activities of RTAs, contact the tourism association in your region.

► CANVASSING

Tourisme Québec has a team of canvassers who cover Québec's most important tourism markets. This team carries out activities designed to encourage distributors on foreign markets to propose Québec tourism products to consumers and prompt consumers to buy those products. The following is a list of the cities where Québec has canvassers, and the markets they work.

Cities	Markets targeted
New York	Mid Atlantic and part of South Atlantic north or North Carolina
Chicago	Midwest
Dallas	Southwest, Southeast and part of South Atlantic south of Virginia
Los Angeles	Pacific and Mountain
Paris	France Belgium
London	United Kingdom Netherlands Scandinavia
Düsseldorf	Germany Austria Switzerland
Tokyo	Japan
Toronto	Canada Korea Taiwan Hong Kong
Montréal	Canada (Maritimes) United States (New England) Italy Spain Mexico and Brazil Australia and New Zealand

The addresses of the canvassers are given in Appendix 3.

For further information on this subject, contact:

* for the North American market, *Jean Bouffard*, of the Direction du développement des marchés, at (514) 873-7977;

* for foreign markets, *Réjean Lafleur*, of the Direction du développement des marchés, at (514) 873-7977.

► TECHNICAL SUPPORT AND ADVICE

Tourisme Québec offers various technical services to businesses. These services deal with, in particular:

- the marketing of tourism products;

For further information on this subject, contact those in charge of products in the Direction du développement des marchés, at (514) 873-7977:

- *Suzanne Watson, Sophie Marcoux*: city stays, touring, tourism events, cruises, bicycle touring, regional cuisine,
- *Hélène Fortier*: alpine skiing, resort vacations, health tourism, cross-country skiing, golf,
- *Louis B. Parent*: snowmobiling, adventure, aboriginal tourism, outdoors,
- *Raynald Paquet*: conventions, business meetings, incentive travel,
- *Michel Leblanc*: hunting and fishing.

- awareness of products and markets.

For further information on this subject, contact *Jean-Marie Girardville*, of the Direction de la recherche et du développement, at (418) 643-5099.

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► JOINT PROMOTIONAL CAMPAIGNS

Tourisme Québec offers partners of the industry the possibility of joining in some of its promotional campaigns. By contacting their RTAs, businesses can participate in the following campaigns:

- Leisure travel in the Québec market

Partners can participate in the televised campaign (programs and commercials).

For further information on this subject, contact *Gilles Parent*, of the Direction de la promotion, at (514) 873-7977.

■ Summer, fall and winter campaigns in the north american markets

Partners can participate:

- in ads in magazines and newspapers (tie-in ads);
- the vacation package booklet (purchase of pages);
- mailings (folder or booklet inserts);
- the monthly fax, Québec Travel Info, distributed to travel agencies and automobile clubs (purchase of space at flat rates).

For further information on this subject, contact *Jacques Moisan*, of the Direction de la promotion, at (514) 873-7977.

■ Business travel campaign in the north american markets

Partners can participate in:

- ads in magazines and newspapers (tie-in ads);
- mailings (folder or booklet inserts);
- the positioning booklet (purchase of pages).

For further information on this subject, contact *Jacques Moisan*, of the Direction de la promotion, at (514) 873-7977.

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► **PRESS RELATIONS**

Tourisme Québec coordinates relations with the print and electronic media on its priority markets in order to increase media visibility of Québec's tourism products and regions. Partners in the industry can participate in the organization of tours for journalists (technical support, financial contribution).

For further information on this subject, contact *Roselyne Hébert*, of the Direction de la promotion, at (514) 873-7977.

► **THE GRANDS PRIX DU TOURISME**

The Grands Prix du tourisme constitute a unique opportunity to reward excellence in the tourism industry and highlight the achievements of individuals and businesses in the sector.

Partners can help sponsor the Québec prizes or provide secondary sponsorships.

For further information on this subject, contact *Gilles Parent*, of the Direction de la promotion, at (514) 873-7977.

► TOURIST INFORMATION

In addition to providing personalized tourist information, Tourisme Québec offers businesses the possibility of obtaining public visibility in the Maisons du tourisme. Various types of visibility can be purchased:

- place for folders in the display stands;

For further information on this subject, contact the tourism association in your region or *Jacinthe Dumoulin*, of the Direction de l'accueil et des renseignements touristiques, at (514) 873-5268.

- promotional activities;
- display case rentals (limited space);
- wall space for posters (Centre Infotouriste de Montréal, Maison du tourisme de Québec).

For further information on this subject, contact *Ion Valcéanu*, of the Direction de l'accueil et des renseignements touristiques, in Montréal (514) 873-5268 or *Lucie Loignon*, of the Direction de l'accueil et des renseignements touristiques, in Québec City (418) 643-2280.

THE BUDGET

BY MARKET

PRODUCTS AND SERVICES	Québec	Canada	United States	Europe				Pacific Rim		Latin America	Multi- markets	TOTAL
				France	United Kingdom	Germany	Other markets	Japan	Other markets			
Positioning and marketing of Québec												
Publicity	1 000	400	4 200	365	375	660	7	100		3		7 110
Publishing	180	162	460	115	58	58		57				1 090
Press relations	75	45	320	160	45	55	17	50	23	10		800
Canvassing		82	25								2 403	2 510
Marketplaces		10	287	27	30	53	12	25	9	12		465
Consumer promotions			63	35	105	12		25				240
Receptions	2	21	171	40	16	75		35			2	362
Consumer shows		9	64	55	22	27		10				187
Seminars	20	5	35		10	18	5	10				103
Fam tours		28	87	20	15	6	5	20	6		20	207
Financial support for the tourism industry												
RTAs											7 500	7 500
Tourism events (PPC)											530	530
Partners in Québec (PPC)	100										1 450	1 550
Foreign partners (PPC)		30	400	297	50	35	120	50	110	20		1 112
Sectoral organizations		40										40
TOTAL	1 377	832	6 112	1 144	726	999	166	382	148	45	11 905	23 806

1997-1998

ACTIVITIES PLAN

QUÉBEC				
Category	Activity	City	Product	Date
Publishing				
	Publications and promotional material			97-98
Publicity				
	Campaigns			97-98
	Travel and Leisure Show			97-98
Press relations				
	Press tours			97-98
Seminars				
	ACTA-Vacances Québec	Montréal	Tours	98-03-31
Programme de promotion coopérative				
	Local partners			
	CAA/Kilomètre Voyage			97-98

MARITIMES

Category	Activity	City	Product	Date*
Press relations				
	Press tours			97-98
Shows for consumers				
	Ski show	Halifax, NS Moncton, NB	Skiing	97-11-00
Fam tours				
	Summer tours		Tours	97-05-00
	Winter tours		Tours	97-12-00

* The figures 00 mean that the date of the activity was not known at the time of printing.

TORONTO				
Category	Activity	City	Product	Date*
Publishing				
	Publications and promotional material			97-98
Publicity				
	Summer campaign	Toronto		97-98
	Winter campaign	Toronto		97-98
Press relations				
	Press relations	Toronto		97-04-01
Marketplaces				
	ACTA	Nashville, TN	Tours	97-05-00
	Meeting/Incentive Canadian Trade Show	Toronto, ON	Conventions, business and incentive travel	97-08-00
	MPI Spring	Toronto, ON	Conventions, business and incentive travel	97-07-00
	OMCA	Toronto, ON	Tours	97-11-00
	PATA	To be determined	Tours	97-00-00
	Product Launches	Toronto, ON	Skiing	97-04-00
	Québec Day	Toronto, ON	Conventions, business and incentive travel	98-02-00
	SCDA	Hamilton, ON	Conventions, business and incentive travel	97-08-00
	Ski Group	Toronto, ON	Skiing	97-05-00
Receptions				
	Cirque du Soleil	Toronto, ON	Conventions, business and incentive travel	97-08-00
	Cirque du Soleil	Toronto, ON	Tours	97-08-00
	MPI Awards	Toronto, ON	Conventions, business and incentive travel	98-02-00
	SCDA	Hamilton, ON	Conventions, business and incentive travel	97-07-12
Consumer shows				
	Snowmobile Show	Markham, ON	Snowmobiling	97-10-00
	The Travel and Leisure Show	Toronto, ON	Tours	97-04-00
	Toronto Ski Show	Toronto, ON	Skiing	97-10-00
Seminars				
	Promotion Casino	Hull, QC	Conventions, business and incentive travel	97-08-00
	SITE Seminar	Toronto, ON	Conventions, business and incentive travel	97-08-00

TORONTO (cont.)				
Category	Activity	City	Product	Date*
Fam tours				
	To be determined	Toronto, ON	Tours	97-00-00
	To be determined	Toronto, ON	Conventions, business and incentive travel	97-00-00
Coop program				
	Partners			
	Wholesalers to be determined	Toronto, ON	City stays	97-00-00
	Wholesalers to be determined	Toronto, ON	Skiing	97-00-00
	Canadian receptive services	Toronto, ON and Vancouver, BC	Tours	97-00-00

* The figures 00 mean that the date of the activity was not known at the time of printing.

UNITED STATES				
Category	Activity	City	Product	Date
Publishing				
	Publications and promotional material			97-98
Publicity				
	Business campaign			
	Summer-fall campaign			97-98
	Winter campaign			97-98
Press relations				
	Press relations			97-04-01
Programme de promotion coopérative				
	Partners			
	Adventures Unlimited		Adventure	
	Certified Holidays			
	Collette Tours			
	Gogo Tours Worldwide Vacation			
	Northwest World Vacation			
	Royal Northwest Holidays		Tours	
	Ski Travel Unlimited		Skiing	

BOSTON

Category	Activity	City	Product	Date*
Marketplaces				
	Boston Globe	Boston, MA	Tours	97-11-00
	National Trade Show	Burlington, VT	Tours	97-11-00
	Ski Group	Boston, MA	Skiing	97-04-00
Promotions geared to consumers				
	Magic 106.7	Boston, MA		97
	WCRB FM	Boston, MA		97
Receptions				
	Québec Ski Day	Boston, MA	Skiing	97-11-00
Consumer shows				
	AAA South Central MA	Warwick and Worcester, MA	Tours	97-03-00
	Glamer Show	Boston, MA	Tours	97-05-21
	NASTP	Cromwell, CT	Tours	97-05-01
	NASTP	Randolf, MA	Tours	97-05-02
	Ski show	Boston, MA	Skiing	98-11-00
	Winter adventure show	Hartford, CT	Adventure	98-01-00
	Winter adventure show	Boston, MA	Adventure	98-01-00
Seminars				
	Nemice	Boston, MA	Conventions, business and incentive travel	97-04-00
	Travel agent certification project	Boston, MA	Tours	98-03-31
Fam tours				
	AAA		Tours	97
	Group Leaders		Tours	97

* The figures 00 mean that the date of the activity was not known at the time of printing.

DALLAS

Category	Activity	City	Product	Date
Marketplaces				
	2 Spotlight Canada	TX	Tours	98-02-00
	5 National Trade Shows	FL, TN, NC, SC, GA	Tours	98-02-00
	6 Spotlight Canada	TN, AL, GA, SC, NC, FL	Conventions, business and incentive travel	98-02-00
	AAA Travel Agency	TN, GA, FL	Tours	98-01-00
	American Airlines Fly Away Vacations	Dallas, TX	Tours	97-11-19
	ASTA Reg/Conf. Show	Orlando, FL	Tours	97-06-05
	Dan Dipert Travel World Marketplace	Arlington, TX	Tours	98-01-10
	Meetings Quest Show	Dallas, TX	Conventions, business and incentive travel	97-08-27
	MPI	Orlando, FL	Conventions, business and incentive travel	98-01-11
	Showcase Canada	Atlanta, GA – Dallas & Houston, TX	Conventions, business meetings and incentive travel	97
	Telemarketing	Dallas, TX		98-03-31
	Texas Ski Council Meeting	San Antonio, TX	Skiing	98-04-00
	Travel Agents of the Carolinas	NC	Tours	98-02-00
Receptions				
	Breakfast receptions	Dallas & Houston, TX – Atlanta, GA	Conventions, business and incentive travel	98-03-31
	Cirque du Soleil	Houston, TX	Tours	97-11-13
	Cirque du Soleil	Dallas, TX		98-02-11
	MPI	Orlando, FL	Conventions, business and incentive travel	98-01-11
	Quiz Canada-Québec	Dallas, TX	Tours	97-06-12
Consumer shows				
	Outdoors Show	Dallas, TX	Tours	97
	Ski Group	Atlanta, GA	Skiing	97-04-17
	Ski Group	Fort Lauderdale, FL	Skiing	97-04-22
	Ski Group	Tampa, FL	Skiing	97-04-29
	Ski Group	Orlando, FL	Skiing	97-04-23
	Soft Adventure Travel Show	Dallas, TX	Tours	98-02-28

DALLAS (cont.)

Category	Activity	City	Product	Date*
Seminars				
	2 ASTA Shows	FL, GA	Tours	97-06-00
	MPI Educational Meeting	Baltimore, MD	Conventions, business and incentive travel	98-01-01
	MPI Luncheon	Dallas, TX	Conventions, business and incentive travel	97-06-00
	Preview of Québec	Oklahoma City, OK	Tours	97
	Texas Society of Association Executives	Dallas, TX	Conventions, business and incentive travel	97-06-12
Fam tours				
	To be determined		Tours	97-98
	To be determined		Conventions, business and incentive travel	97-98

* The figures 00 mean that the date of the activity was not known at the time of printing.

CHICAGO

Category	Activity	City	Product	Date
Marketplaces				
	2 Chicago Tribune Shows	Chicago, IL	Tours	97
	2 Detroit News Shows	Detroit, MI	Tours	97
	2 Glamer Shows	Chicago, IL	Tours	97
	2 Minneapolis Star Tribune Shows	Minneapolis, MN	Tours	97
	5 Spotlight Canada	IL, MN, OH, MI	Tours	97-10-00
	ASAE	Chicago, IL	Conventions, business and incentive travel	97-07-26
	Chicago SAE	Chicago, IL	Conventions, business and incentive travel	97-12-00
	Cleveland Plain Dealer Show	Cleveland, OH	Tours	97
	Gay & Lesbian Show	Chicago, IL	Tours	97
	Spring & Fall			
	Glamer Show	Milwaukee, WI	Tours	97
	Glamer Show	St. Louis, MO	Tours	97
	IT&ME	Chicago, IL	Conventions, business and incentive travel	97-10-06
	Mayflower Tours Show	Chicago, IL	Tours	98-03-00
	Milwaukee Sentinel Show	Milwaukee, WI	Tours	
	MPI	Chicago, IL	Tours	
	Showcase Canada	Minneapolis, MN	Conventions, business and incentive travel	97
	Showcase Canada	Detroit, MI	Conventions, business and incentive travel	97
	Showcase Canada	Milwaukee, WI	Conventions, business and incentive travel	97
	Showcase Canada	Chicago, IL	Conventions, business and incentive travel	97-11-00
	St. Louis Post Dispatch Show	St. Louis, MO	Tours	97
	St. Louis SAE	St. Louis, MO	Conventions, business and incentive travel	97-07-00
	Telemarketing	Chicago, IL		98-03-31
Receptions				
	Canada Day	Chicago, IL	Tours	97-07-00
	Dinner Corporate Accounts	St. Louis, MO	Conventions, business and incentive travel	97-07-00
	Dinner Corporate Accounts	Dearborn, MI	Conventions, business and incentive travel	97-05-00
	Dinner Corporate Accounts	Chicago, IL	Conventions, business and incentive travel	97-10-00
	Dinner Theater	Minneapolis, MN	Conventions, business and incentive travel	97-11-00
	Dinner Theater	Minneapolis, MN	Conventions, business and incentive travel	97-05-00
	Golf Outing	Chicago, IL	Conventions, business and incentive travel	97-06-00
	IT&ME	Chicago, IL	Conventions, business and incentive travel	97-10-06
	Quiz Canada-Québec	Chicago, IL	Tours	97-06-10

CHICAGO (cont.)

Category	Activity	City	Product	Date*
Receptions (cont.)				
	Sponsor Ski Club Meeting	Chicago, IL	Skiing	97
	Sponsor Ski Club Meeting	Detroit, MI	Skiing	97-10-00
	Theater Event	Chicago, IL	Conventions, business and incentive travel	97-05-00
Consumer shows				
	International Adventure Show	Chicago, IL	Adventure	97
	Mall of America – Promo	Minneapolis, MN	Tours	97
	Neiman Marcus – Promo	Chicago, IL	Tours	97
	Ski Show	Cleveland, OH	Skiing	97
	Ski Show	Detroit, MI	Skiing	97
	Ski Show	Chicago, IL	Skiing	97
Seminars				
	4 Tour & Travel Breakfasts	IL, MN, OH, MI	Tours	97-06-00
	AAA Michigan	Detroit, MI	Tours	97-06-00
	PCMA	Kansas City, KS	Conventions, business and incentive travel	98-01-00
Fam tours				
	Tourist tours		Tours	97-10-00
	Convention tours		Conventions, business and incentive travel	97-06-00

* The figures 00 mean that the date of the activity was not known at the time of printing.

LOS ANGELES

Category	Activity	City	Product	Date
Marketplaces				
	2 Spotlight Canada	North & South CA	Tours	98-03-01
	Affordable Meetings	San Jose, CA	Conventions, business and incentive travel	97-04-17
	Gay Travel Show	Seattle, WA	Tours	97-10-07
	Gay Travel Show	San Francisco, CA	Tours	97-10-22
	Gay Travel Show	Los Angeles, CA	Tours	97-10-30
	ICPA	San Diego, CA	Conventions, business and incentive travel	97-11-10
	PATA Adventure Show	Los Angeles, CA	Adventure	97-10-14
	SCC MPI	San Francisco, CA	Conventions, business and incentive travel	97-02-01
	SCC MPI	Los Angeles, CA	Conventions, business and incentive travel	97-11-03
	Showcase Canada	Seattle, WA	Conventions, business and incentive travel	97-08-20
	Showcase Canada	San Francisco, CA	Conventions, business and incentive travel	97-08-15
	Swing Thru Canada	Los Angeles, CA	Conventions, business and incentive travel	97-06-17
	Telemarketing	Los Angeles, CA	Conventions, business and incentive travel	98-03-31
	Tour Expo 97	Los Angeles, CA	Tours	97-10-31
	USTOA	Honolulu, HI	Conventions, business and incentive travel	97
Receptions				
	Cirque du Soleil	Denver, CO	Tours	97-11-01
	Cirque du Soleil	San Francisco, CA	Tours	97-08-01
	Cirque du Soleil	San Francisco, CA	Conventions, business and incentive travel	97-07-10
	Cirque du Soleil	San Jose, CA	Tours	97-07-31
	ICPA	San Diego, CA	Conventions, business and incentive travel	97-11-10
Consumer shows				
	Adventure Show	San Francisco, CA	Adventure	98-03-03
	LA Times Travel	Los Angeles, CA	Tours	98-03-28
	Orange County Travel Show	Anaheim, CA	Tours	98-02-01
Seminars				
	Destination Québec	Las Vegas, NV	Tours	98-03-31
	Destination Québec	Denver, CO	Tours	98-03-31
	Destination Québec	Los Angeles, CA	Tours	98-03-31
	Destination Québec	San Diego, CA	Tours	98-03-31
	Destination Québec	Seattle, WA	Tours	98-03-31
	Destination Québec	San Francisco, CA	Tours	98
	Destination Québec	Phoenix, AR	Tours	98-03-31
Fam tours				
	Fam tours		Tours	97

NEW YORK – BUSINESS

Category	Activity	City	Product	Date
Marketplaces				
	Affordable Meetings	Washington, DC	Conventions, business and incentive travel	97-09-02
	Canada Showcase DC	Washington, DC	Conventions, business and incentive travel	97-11-13
	Canada Showcase NY	New York, NY	Conventions, business and incentive travel	97-11-20
	Canada Showcase Rochester	Rochester, NY	Conventions, business and incentive travel	98-03-01
	CESSE (breakfast)	Pittsburgh, PA	Conventions, business and incentive travel	97-07-31
	FIM (Foundation International Meetings)	Washington, DC	Conventions, business and incentive travel	97-10-01
	Meeting World	New York, NY	Conventions, business and incentive travel	97-07-22
	Meetingplace	Baltimore, MD	Conventions, business and incentive travel	97-08-00
	MPI-World Education	Baltimore, MD	Conventions, business and incentive travel	97-08-01
	RSA Annual Summit	New York, NY	Conventions, business and incentive travel	97
	Telemarketing	New York, NY		98-03-31
Receptions				
	Canadians (hockey)	New York, NY	Conventions, business and incentive travel	98-01-00
	Céline Dion	Hartford, CT	Conventions, business and incentive travel	97-04-08
	Céline Dion	New York, NY	Conventions, business and incentive travel	97-04-12
	Cirque du Soleil	New York, NY	Conventions, business and incentive travel	98-04-00
	Expos Baseball	New York, NY	Conventions, business and incentive travel	97-06-00
	Fashions on Ice	New York, NY	Conventions, business and incentive travel	98-01-00
	Montréal Symphony Orchestra	New York, NY	Conventions, business and incentive travel	97-10-25
	Inauguration of Washington bureau	Washington, DC	Conventions, business and incentive travel	97-05-06
	Québec Day (Cirque du Soleil)	New York, NY	Conventions, business and incentive travel	98-02-00
Seminars				
	Maryland Sales Seminar	Baltimore, MD	Conventions, business and incentive travel	97-07-28
	New Jersey Sales Seminar	Princeton, NJ	Conventions, business and incentive travel	97-11-24
	New York Sales Seminar	New York, NY	Conventions, business and incentive travel	97-03-06
	Philadelphia Sales Seminar	Philadelphia, PA	Conventions, business and incentive travel	97-08-06
	Virginia Sales Seminar	Arlington, NY	Conventions, business and incentive travel	97-09-08

NEW YORK – BUSINESS (cont.)				
Category	Activity	City	Product	Date*
Fam tours				
	Incentive Golf Fam		Conventions, business and incentive travel	97-06-15
	Marritz Educational		Conventions, business and incentive travel	97-06-00
	Montreal Corporate Fam		Conventions, business and incentive travel	97-09-12
	Montreal Incentive Fam		Conventions, business and incentive travel	97-07-18
	Québec City Incentive Fam		Conventions, business and incentive travel	97-10-00
	Québec Resorts Incentive Fam		Conventions, business and incentive travel	97
	Québec Winter Carnival Fam		Conventions, business and incentive travel	98-02-00
	Sept-Îles Aboriginal Fam		Conventions, business and incentive travel	97-09-15

* The figures 00 mean that the date of the activity was not known at the time of printing.

NEW YORK – PLEASURE

Category	Activity	City	Product	Date*
Marketplaces				
	Glamer Show	Buffalo, NY	Tours	97-05-00
	Glamer Show	White Plains, NY	Tours	97-05-23
	Glamer Show	Long Island, NY	Tours	97-05-22
	Glamer Show	Philadelphia, PA	Tours	97-05-16
	Golfgroup	Secaucus, NJ	Resort vacations	97
	NASTP Shows	Baldwin, NY	Tours	97-04-09
	NASTP Shows	Wayne, NJ	Tours	97-04-10
	Northeast Conf, TFL	New York, NY	Tours	97-04-01
	NTE Trade Show	Philadelphia, PA	Tours	97-05-15
	NTE Trade Show	New York, NY	Tours	97-05-13
	NTE Trade Show	Westchester, NY	Tours	97-05-13
	NTE Trade Show	Secaucus, NJ	Tours	97-05-14
	NTE Trade Show	Baltimore, MD	Tours	97-05-07
	NTE Trade Show	Long Island, NY	Tours	97-05-12
	PBA Trade Show	Harrisburg, PA	Tours	98-04-00
	Québec Marketplace – Summer	New York, NY	Tours	98-02-00
	Québec Marketplace – Winter	New York, NY	Tours	97-09-16
	Shipboard GoGo Liberty	New York, NY	Tours	97-06-16
	Shortline Travel Show	Newark, NJ	Tours	97-09-01
	SkiGroup '97	Washington, DC	Skiing	97-04-28
	SkiGroup '97	Secaucus, NJ	Skiing	97-04-30
	SkiGroup '97	Philadelphia, PA	Skiing	97-04-29
	SkiGroup '97	New York, NY	Skiing	97-05-01
	SkiGroup '97	Pittsburgh, PA	Skiing	97-05-07
	Smithsonian Annual Meeting	Washington, DC	Tours	97-03-01
	Spotlight Canada	Pittsburgh, Pa – Buffalo, NY – Rochester, NY	Tours	97-04-01
	Travel Expo	New York, NY	Tours	98-03-01
Receptions				
	Cirque du Soleil	New York, NY	Tours	98
Consumer shows				
	Annenberg Center Festival	Philadelphia, PA	Tours	97-09-01
	Going Places Travel	Staten Island, NY	Tours	97-03-11
	National Ski Show	Long Island, NY	Skiing	97-11-01
	National Ski Show	Philadelphia, PA	Skiing	97-10-24
	National Ski Show	Washington, DC	Skiing	97-11-07
	Travel Expo	Albany, NY	Tours	97-05-14
	Travel Expo	Warren County, NY	Tours	98-04-01
	Washington Post Fest '97	Washington, DC	Tours	97-10-01

NEW YORK – PLEASURE (cont.)				
Category	Activity	City	Product	Date*
Seminars				
	2 seminars with Air Canada	New York	Tours	97
	8 seminars for travel agents	NY, NJ, PA	Tours	97
	Eastern PA Ski Council	Philadelphia, PA	Skiing	97-10-01
	Gay & Lesbian	Washington, DC	Tours	97-09-09
	Gay & Lesbian	New York, NY	Tours	97-09-12
	New Jersey Ski Jamboree	Wayne, NJ	Skiing	97-11-01
	PBA annual meeting		Tours	97-06-00
	AAA seminars	NY, NJ, PA	Tours	
	Westchester Agencies	Westchester, NY	Tours	97-04-07
Fam tours				
	Summer and winter products			97

* The figures 00 mean that the date of the activity was not known at the time of printing.

MONTRÉAL

Category	Activity	City	Product	Date*
Marketplaces				
	Bienvenue Québec	Hull	Tours	97-10-20
	Headliners	To be determined	Conventions, business and incentive travel	98-04-00
	NTA/ABA Team Canada	San Antonio	Tours	97
	Ontario-Québec Reverse Marketplace	Tremblant	Tours	97-10-28
	Rendez-vous Canada	Vancouver	Tours	97-05-10
Promotions geared to consumers				
	Adventure Travel Society Convention	Mont-Tremblant	Adventure	97-10-00
	Creation of Association producteurs d'aventures	Montréal	Adventure	97
Receptions				
	Rendez-vous Canada	Vancouver	Tours	97-05-10
	Annual meeting of consultants	Montréal		98
	Meetings of product committees and others	Montréal, Québec City	Tours	98-03-31
Consumer shows				
	Hunting and fishing shows	United States and Toronto	Hunting and fishing	98-03-31
Fam tours				
	Bienvenue Québec	Hull	Tours	97-10-20
	Canadian Sportfishing – filming	Varied	Hunting and fishing	97
	Ontario-Québec Reverse Marketplace	To be determined	Tours	97
	PBS filming	To be determined	Hunting and fishing	97-98
	Rendez-vous Ski Québec	To be determined	Skiing	97
Sectoral organizations				
	Kéroul	Montréal	Tours	98-03-31
Programme de promotion coopérative				
	Tourism events			
	Coupe monde vélo de montagne	Québec City	Adventure	97-98
	Festival d'été de Québec	Québec City	Tours	
	Festival de cinéma international	Abitibi	Tours	
	Festival de folklore	Drummondville	Tours	
	Festival de montgolfières de Gatineau	Gatineau	Tours	
	Festival de musique actuelle	Victoriaville	Tours	
	Festival du canard	Lac-Brôme	Tours	
	Festival international de Lanaudière	Joliette	Tours	
	Formula One Grand Prix	Montréal	Tours	
	Valcourt Grand Prix	Valcourt	Tours	

MONTRÉAL (cont.)

Category	Activity	City	Product	Date*
Programme de promotion coopérative (cont.)				
	Trois-Rivières Grand Prix	Trois-Rivières	Tours	
	International regatta	Ville-Marie	Tours	
	International regatta	Valleyfield	Tours	
	Truck rodeo	Abitibi	Tours	
	Tour of Abitibi	Abitibi	Tours	
Programme de promotion coopérative				
	Local Partners			
	Assoc. Centres de ski de fond		Resort vacations	
	Assoc. Centres de santé		Resort vacations	
	Adventure pamphlet – Europe		Adventure	
	Hunting and fishing – Europe		Hunting & fishing	
	Hunting and fishing – USA		Hunting & fishing	
	Getaway tours		City stays	
	Special interest tours		Tours	
	Clubtour Sat – CTC		Adventure	
	Cruise committee		City stays	•
	Conseil québécois de la musique		Tours	•
	Bicycle touring		Tours	•
	Féd. Clubs motoneigistes Québec		Snowmobiling	•
	Receptive wholesalers		Conventions, business and incentive travel	
	Receptive wholesalers		Tours	
	Guide to aboriginal tourism		Adventure	
	Country accommodation		Resort vacations	•
	Laurentides-Québec shuttle		Skiing	•
	Greater Montréal Convention and Tourism Bureau		Tours	•
	Option Art (museums and galleries)		Tours	
	Aboriginal tourism marketing plan		Adventure	
	Promotion Golf		Resort vacations	
	Québec Amerindians and Inuit		Adventure	
	Maritime Québec		Tours	
	Québec Science		Tours	
	Relais et Châteaux		Resort vacations	
	Ski Toronto Star		Skiing	
	Ski/Fo 5 Seasons		Skiing	
	Skican		Skiing	
	Société fêtes festivals – direct mailing – Toronto		Tours	
	Société fêtes festivals – daily newspaper inserts – United States		Tours	
RTA support program				
	Regional tourism associations	Varied	Multiple products	98-03-31

* The figures 00 mean that the date of the activity was not known at the time of printing.

PARIS

Category	Activity	City	Product	Date*
Publishing				
	Publications and promotional material			97-98
Publicity				
	Various ads			97-98
	Fax Trade	Paris		98
	TV commercial (fall)			97-98
	TV commercial (spring)			97-98
	Regional promotions			97
Press relations				
	Press tours			97-98
Marketplaces				
	Atelier Canada	Paris	Tours	97-11-05
	Distribution Kit Québec	Brussels, Liège, Gent	Tours	97-05-00
	61 tour operators			
	Top Resa	Deauville	Tours	97-09-25
Consumer promotions				
	Rivière-Éternité crèches	Paris	Tours	97-12-01
	Les Grands Explorateurs			97-98
Receptions				
	Atelier Canada (inauguration)	Paris	Tours	97-11-05
	Magny Cours Formula One		Tours	97-06-29
	Guide Ulysse	Paris	Tours	98-03-00
	Launching special Québec issues	Paris	Tours	97-10-00
	Quoi de neuf au Québec?	Paris	Tours	97-05-06
Consumer shows				
	Beau Soleil	Nancy	Tours	98-03-07
	Foire de Nice	Nice	Tours	98-03-07
	Mahana	Lyons	Tours	98-03-13
	MTC	Grenoble	Tours	98-02-20
	Partir en hiver	Paris	Tours	97-10-25
	Rando Expo	Paris	Tours	98-03-06
	Tourism show	Brussels	Tours	98-03-21
	Tourism and travel show	Rennes	Tours	98-01-23
	SITV	Colmar	Tours	97-11-08
	SMT	Paris	Tours	98-03-19
	Tourissima	Lille	Tours	98-02-07
	Tourissimo	Strasbourg	Tours	98-03-20

PARIS (cont.)				
Category	Activity	City	Product	Date*
Fam tours				
	Various tour operators in France and one in Belgium	France and Belgium		97-06-00
Programme de promotion coopérative				
	Partners			
	Advertising in print media/ Nouvelles Frontières	Paris		
	Boomerang	Nice		
	Radio campaign/ Vacances Air Transat	Paris		
	Direct marketing	Paris		
	Direct consumer marketing	Paris		
	Relais et Châteaux	France		
	Major tour operators in Belgium	Belgium		

* The figures 00 mean that the date of the activity was not known at the time of printing.

LONDON

Category	Activity	City	Product	Date*
Publishing				
	Publications and promotional material			97-98
Publicity				
	Communications Partnership public relations agency			97-98
	TV campaign with CTC			97-98
	National media: Sunday Times, The Times, Mail on Sunday, Radio Time			97-98
	Selling Longhaul, TTG, Travel Weekly			97-98
Press relations				
	Press tours			97-98
Marketplaces				
	Club Canada Series	Belfast and other cities	Tours	97-98
	Confex	London	Conventions, business and incentive travel	98-03-03
	Spotlight Canada	London	Tours	98-03-00
	WTM	London	Tours	97-11-00
Consumer promotions				
	"Essentially Québec"			97-98
	Canada Travel Planner			97-98
	Canada Winter Guide			97-98
	Essentially America, advert and feature			97-98
	National media			98
Receptions				
	Canada Travel Awards	London	Tours	98-03-00
	Céline Dion	London	Tours	97-06-14
	M+IT Awards	London	Conventions, business and incentive travel	98-03-00
	Ontario Québec Evening	London	Tours	98-03-00
	Visit Canada Centre	London	Tours	98-01-00
Consumer shows				
	Destination '98	London	Tours	98-02-00
	G-Mex	Manchester	Tours	98-01-00
	Ski Shows	Birmingham, London	Skiing	97-10-00
	Vakantie	Utrecht	Tours	98-01-00
Seminars				
	BA Dublin Tour Operators	Dublin	Tours	97-06-00
	Canada Workshops	Varied	Tours	97-98
	Visit USA and Canada Workshop	Denmark	Tours	98-03-00

LONDON (cont.)				
Category	Activity	City	Product	Date*
Fam tours				
	Varied			97-98
Programme de promotion coopérative				
	Foreign partners			
	All Canada			
	BA Holidays			
	Canada Connections		Tours	
	Crystal			
	CTC & Ontario		Tours	
	Inspirations/Skiers World			
	Jetsave		Tours	
	Peregrine Jazz Programme		City stays	
	Travel 4		Tours	
	Travelbag			

* The figures 00 mean that the date of the activity was not known at the time of printing.

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DÜSSELDORF

Category	Activity	City	Product	Date*
Publishing				
	Publications and promotional material			97-98
Publicity				
	Wilde & Partner public relations agency			97-98
	Publicity campaign			98-01-00
	Publicity campaign			97-05-00
Press relations				
	Press tours			97-98
Marketplaces				
	EIBTM	Geneva	Conventions, business and incentive travel	97-05-13
	ITB	Berlin	Tours	98-03-07
	TravelTrade Workshop	Montreux	Tours	97-11-00
Consumer promotions				
	Karstadt	Varied	Tours	97-05-20
	Mövenpick	Varied	Tours	97-98
	Olivandenhof	Cologne	Tours	97-98
	Sympatex/RS Fashion	Varied	Tours	97-98
	Transglobe	Rhineland	Tours	97-98
Receptions				
	Cirque du Soleil	Vienna	Tours	97-09-19
	Cirque du Soleil Algérie	Düsseldorf	Tours	97-11-14
	Cirque du Soleil Algérie	Berlin	Tours	97-07-11
	Launching Air Canada's Frankfurt flight	Frankfurt	Tours	97
	Sellers' mission/ Quiz Canada-Québec	Düsseldorf-Munich	Tours	97-09-00
	CMT Evening	Stuttgart	Tours	98-01-00
	Saint-Jean-Baptiste	Geneva	Tours	97-06-24
Consumer shows				
	CBR	Munich	Tours	98-02-00
	CMT	Stuttgart	Tours	98-01-00
	Ferien	Vienna	Tours	98-01-00
	FESPO	Zurich	Tours	98-01-00
	Reisemarkt	Cologne	Tours	97-11-00
	Reisen	Hamburg	Tours	98-02-00
	Book fair	Geneva	Tours	97-04-00
	Touristik Caravan	Leipzig	Tours	97-12-00

DÜSSELDORF (cont.)				
Category	Activity	City	Product	Date*
Seminars				
	Airtours	Varied	Tours	98-01-00
	CTC Seminar Canada	To be determined	Tours	97-11-00
	DER	Varied	Tours	98-01-00
	Kuoni	Varied	Tours	98-02-00
	Meier's Welstrisen	Varied	Tours	98-01-00
	Reisebürostammtisch	Varied	Tours	97-98
Fam tours				
	To be determined	To be determined	Tours	97-98
	Air Transat		Tours	97-05-00
	Incentive		Conventions, business and incentive travel	97-98
Programme de promotion coopérative				
	Foreign partners			
	Package vacation campaign booklet		Tours	
	Knecht Reisen	Switzerland	Snowmobiling	

* The figures 00 mean that the date of the activity was not known at the time of printing.

SPAIN				
Category	Activity	City	Product	Date
Press relations				
	Press tours			97-98
Marketplaces				
	FITUR 98	Madrid	Tours	98-01-27
Programme de promotion coopérative				
	Foreign partners			
	Varied			97-98

ITALY				
Category	Activity	City	Product	Date
Press relations				
	Press relations			97-98
Marketplaces				
	BIT	Milan	Tours	98-02-25
Fam tours				
	Québec Winter Adventure			97-98
	Ventana			97-98
Programme de promotion coopérative				
	Foreign partners			
	Air Canada			
	Canadian Airlines			
	Chiariva			
	Giver			
	Hotelplan			
	Vedette Viaggi			
	Ventana			

TOKYO

Category	Activity	City	Product	Date*
Publishing				
	Publications and promotional material			97-98
Publicity				
	Other projects to be determined	To be determined		97-98
	Québec Campaign Advertisement Project	Osaka		97-98
	Toyuki Campaign			97-98
Press relations				
	3 print media tours and 1 TV tour			97-98
Marketplaces				
	Kanata '97	Tokyo and Osaka	Tours	97-10-12
Consumer promotions				
	To be determined	Osaka or Hiroshima-Tokyo	Tours	97-98
Receptions				
	Cirque Éloize	Tokyo		98-07-00
	Functions to be determined in the Kansai region	Osaka		97-10-00
	Québec Reception	Tokyo		97-12-00
	The 20th Canada Cup Golf Tournament	Ibaraki Pref.		97-06-02
Consumer shows				
	The 11th JATA	Tokyo	Tours	97-11-25
Seminars				
	Travel Trade City Seminars	Nagoya, Fukuoka, Sapporo, Osaka	Tours	97-98
Fam tours				
	AC/Tourisme Québec/ PQI Eastern Canada Fam Tour	Osaka	Tours	97-06-00
	AC/TQ/Tourism Ontario Eastern Canada Fam Tour	Osaka	Tours	97-10-00
	NW/Tourisme Québec/ ATPC Fam Tour	Tokyo and Osaka	Tours	97-12-00
Programme de promotion coopérative				
	Foreign partners			
	JTB Kansai Media Sales		Tours	97
	Kinki Nippon Tourist Marunouchi		Tours	97
	Kinki Nippon Tourist Media Sales		Tours	97

* The figures 00 mean that the date of the activity was not known at the time of printing.

SOUTHEAST ASIA				
Category	Activity	City	Product	Date*
Press relations				
	Press tours			97-98
OPERATION OF ACTIVITIES				
Marketplaces				
	Showcase Canada		Tours	97-10-00
Seminars				
	Canadian Airlines Taiwan	Taiwan	Tours	97
Fam tours				
	To be determined		Tours	97
Programme de promotion coopérative				
	Foreign partners			
	Canadian Airlines	Taipei	Tours	97

* The figures 00 mean that the date of the activity was not known at the time of printing.

MEXICO				
Category	Activity	City	Product	Date*
Press relations				
	Press tours			98
Marketplaces				
	Conozca Canada '98	Mexico		98-04-00
	Tour Operator Workshop	Mexico	Tours	97-10-00
Programme de promotion coopérative				
	Foreign partners			
	To be determined	Mexico		98-03-31

* The figures 00 mean that the date of the activity was not known at the time of printing.

BRAZIL				
Category	Activity	City	Product	Date*
Publicity				
	Panrotas		Tours	98-03-31
Press relations				
	Press tours			98
Marketplaces				
	ABAV	Rio de Janeiro		97-10-08
	Braztoa	Sao Paulo		98-03-00
Programme de promotion coopérative				
	Foreign partners			
	South Travel Brazil	Brazil	Tours	98-03-31

* The figures 00 mean that the date of the activity was not known at the time of printing.

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APPENDIX 1

TOURISM

IN QUÉBEC

TOURISM VOLUME ('000)

Market of origin	1994	1995	1996
United States	1 810	1 949	1 919
• Bordering markets	1 147	1 210	1 210
• Distant markets	663	739	709
Overseas markets	959	1 097	1 236
• France	341	366	393
• United Kingdom	93	114	116
• Germany	58	78	116
• Japan	45	55	58
Sub-total for international tourism	2 769	3 046	3 155 ¹
Other Canadian provinces	2 296	2 370	2 421 ²
Québec	14 295	14 755	15 072 ²
Total	19 360	20 171	20 648

1. Estimate based on actual results for international tourism in first nine months of 1995.

2. CTRI forecast, since the results of the Canadian Travel Survey for 1996 are not yet out.

TOURISM EXPENDITURE (\$000)

Market of origin	1994	1995	1996
United States	708	762	878
• Bordering markets	393	405	497
• Distant markets	315	357	381
Other international markets	707	837	937
• France	282	328	365
• United Kingdom	45	51	54
• Germany	33	47	68
• Japan	37	44	48
Sub-total for international tourism	1 415	1 599	1 815 ¹
Other Canadian provinces	475	499	517 ²
Québec	1 753	1 841	1 911 ²
Total	3 643	3 939	4 243

Source : Statistics Canada

1 Estimate based on actual results for international tourism in the first nine months of 1995.

2 CTRI forecast, since the results of the Canadian Travel Survey are not yet out. The total excludes the expenditures made by Quebecers in Québec for trips outside Québec, since the mission of Tourisme Québec is to promote tourism in Québec. Moreover, expenses of visitors on excursions are not considered since it is not possible to break them down by geographic market.

APPENDIX 2

THE PUBLISHING PROGRAM

Product	Print run	Language	Clientele
Vacances Québec	83 300 106 100	French English	general public various markets
Calendar of events	60 000 250 000	English French	general public insert in Vacances Québec
Accommodations	120 000 100 000	French English	general public various markets
ACTA-Vacances Québec sales handbook	(winter) 350 (summer) 350	French	tour operators Québec
Adventure	50 000 40 000	French English	general public Europe
Flyers	100 000 125 000 30 000 25 000	French English German Spanish	general public various markets
Snowmobiling	15 000 10 000	French English	general public various markets
Meeting in Québec	10 000	English	specialized clientele various markets
New products booklet	500 300	French English	general public various markets
Québec's Far North (map)	30 000 10 000	English French	specialized clientele various markets
Incentive kits	100 950	French English	specialized clientele various markets
► Winter promotion	25 000 25 000	French English	general public various markets
► Ski promotion	325 000	English	industry England
► Tourist routes	1 000 1 000	French English	industry various markets
► Special interest tours	1 000 1 000	French English	industry various markets
► Cross-country ski promotion	To be determined	To be determined	general public various markets

► : New publication

APPENDIX 3

THE CANVASSING TEAM

City	Name	Telephone Fax	Markets targeted
New York	Alberto Marte (pleasure)	(718) 657-1727 (718) 206-9114	Mid Atlantic and part of South Atlantic, north of North Carolina
	Roberta Horton (conventions, incentive travel)	(212) 317-1711 (212) 317-1881	
Chicago	Marilyn O'Connor	(312) 726-4350 (312) 263-2335	Northeast and Centre Northwest
Dallas	Sandy Mukitirian	(972) 414-7013 (972) 495-7660	Centre Southwest, Centre Southeast and part of South Atlantic, south of Virginia
Los Angeles	Fair Gordon	(310) 656-9611 (310) 656-9614	Pacific and Mountain
Paris	Barbara di Stefano	(01) 53-70-00-25 (01) 53-70-00-07	France Belgium
London	Josephine Wiggall-Lazarus	(171) 233-8011 (171) 233-7203	United Kingdom Netherlands Scandinavia
Düsseldorf	Martina Klockner-Scherfeld	(211) 91-42-60 (211) 91-42-614	Germany Austria Switzerland
Tokyo	Seichi Iwabushi	(3) 5379-6177 (3) 5379-5517	Japan
Toronto	Isabel Gil	(416) 977-6060 (416) 596-1407	Canada Korea Taiwan
Montréal	Carole C. Gatién	(514) 873-7977 (514) 873-2762	Atlantic Canada New England Italy Spain Mexico and Brazil Australia and New Zealand
	Raynald Paquet Michel Gagné		