

Marketing Plan

2001-2002

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Foreword

The *2000-2001 Marketing Plan* presents the Québec government's tourism marketing guidelines, strategies and action priorities. It also describes Tourisme Québec's marketing activities to promote products and services that Tourisme Québec can provide for 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 diverse opportunities offered. Information in the plan will ensure better customer service for the tourism industry, an objective at the heart of Tourisme Québec's mission.

Table of Contents

1	PERFORMANCE AND OUTLOOK	7
2	GUIDELINES AND OBJECTIVES	11
2.1	Leisure Tourism Priority Markets.....	11
2.2	Meetings, Conventions and Incentive Travel Priority Markets.....	14
3	MARKETS: ANALYSIS AND STRATEGY	17
3.1	Québec Market.....	17
3.2	North American Market.....	21
3.2.1	Canada	21
3.2.2	The United States	23
3.3	Other International Market.....	36
3.3.1	France (Belgium).....	37
3.3.2	The United Kingdom.....	43
3.3.3	Germany (Switzerland and Austria).....	47
3.3.4	Italy.....	51
3.3.5	Japan	53
3.4	Emerging Markets	56
3.4.1	Latin America.....	57
3.4.2	Pacific Rim Countries (excluding Japan)	59
3.5	Multi-market Promotional Activities.....	64
3.5.1	Promotional Tools and Publications.....	64
3.5.2	Tourist Information	65

4	OPPORTUNITIES FOR INDUSTRY	67
5	BUDGET PER MARKET	71
	2001-2002 OPERATIONS PLAN.....	73
	APPENDIX 1 - Tourism in Québec.....	107
	APPENDIX 2 - The Publishing Program	109

1 Performance and Outlook

It is a well-known fact that the past colours the future. This chapter presents an overview of Québec's performance in tourism in 2000 and the outlook for 2001-2002.

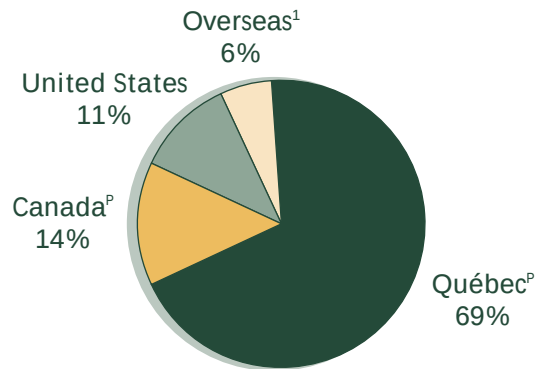
2000: A Positive Performance

Results for 2000 indicate that the recovery observed in 1998 is still continuing. As in 1999, all markets contributed to this success.

Between 1999 and 2000,

- travel by Quebecers in Québec increased by 11.1%;
- the number of American tourists rose (2.7%) for a third consecutive year. Revenue remained above the billion-dollar mark, thanks to an increase of 6.1% in 2000. First quarter results were exceptional, particularly as a result of an increase in investments, which culminated in an intensive promotional campaign; in comparison to the first quarter of 1999, the number of American visitors increased by 12% in 2000;
- the rise in clientele from other international markets recorded for 1999 continued into 2000 (3.7%). The same may be said for revenue (2.7%).

Distribution of the 21 million tourists in 2000 (United States, Overseas)

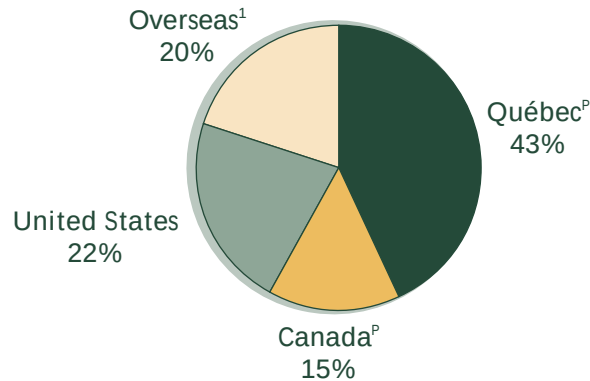


Sources: Statistics Canada, *International Travel Survey (ITS)* and *Canadian Travel Survey (CTS)*

P = Preliminary estimates of Statistics Canada that are subject to revision

1 = Data adjusted by Tourisme Québec on the basis of border crossings

Distribution of the \$5.3 billion in tourism revenue in 2000



Sources: Statistics Canada, *International Travel Survey (ITS)* and *Canadian Travel Survey (CTS)*

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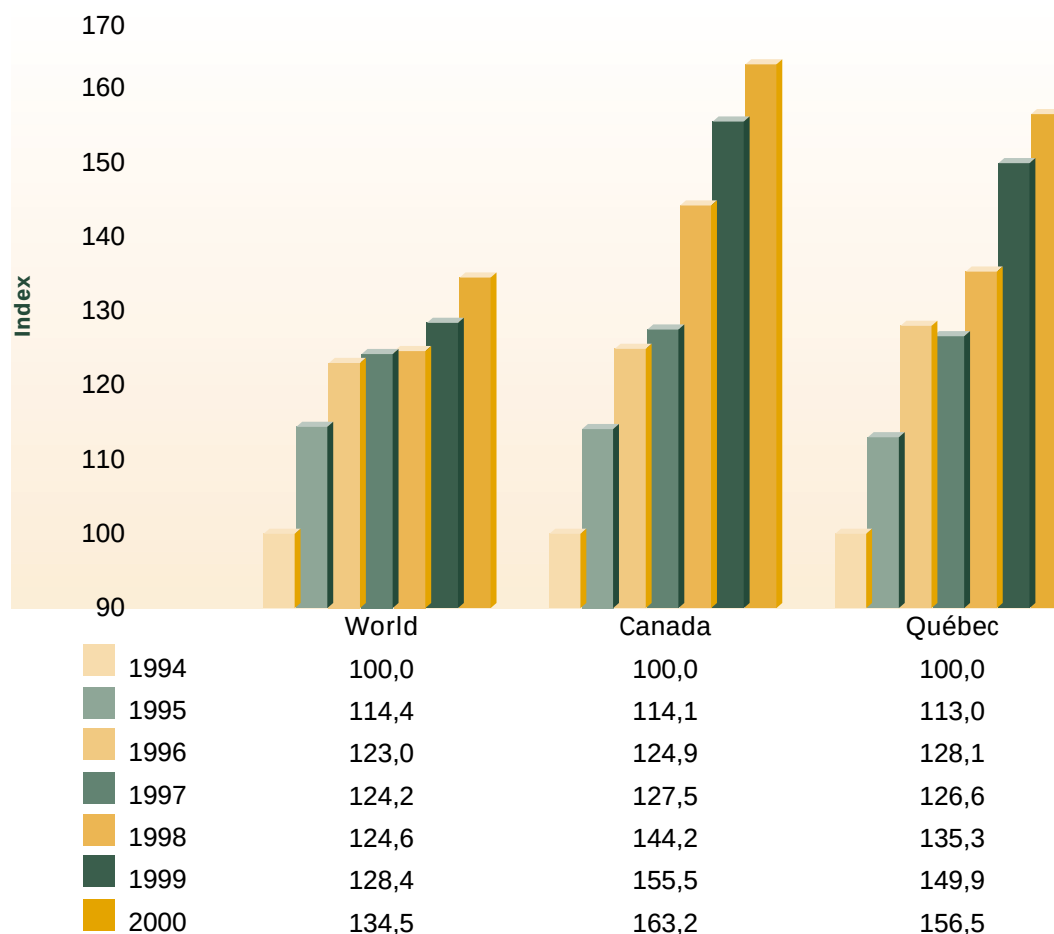
1 = Data adjusted by Tourisme Québec on the basis of border crossings

**International Tourism:
Québec Is the Top Performer in Canada**

In terms of international revenue, Québec experienced a 6.6 point increase in its performance rating between 1999 and 2000, which is higher than the international tourist revenue rating (6.1).

The 1999 situation repeated itself with regard to the number of international tourists entering Canada: Québec, with a growth rate of 3.4% in 2000, outperformed its two main rivals, Ontario and British Columbia. However, it is mostly through the American market that Québec truly outdid the competition.

Evolution of international tourism revenue



2001: Growth Should Continue, But at a More Moderate Pace

According to the Canadian Tourism Research Institute, increases in tourism indicators in Québec should be lower in 2001 than in 2000. Tourisme Québec foresees an increase of 2.3% in volume and 5.8% in revenue. These forecasts are generally considered to be conservative.

2 Guidelines and Objectives

Tourist trade expansion in Québec may be explained by customer loyalty in nearby markets (Québec, Ontario, north-eastern United States). However, client segmentation and strong competition are obliging Québec to improve its tourism marketing to maintain the growth rate experienced since 1993. Moreover, Québec must attempt to diversify its international markets. The 2000-2005 *Tourism Marketing Strategy** made public in November 2000 places the emphasis on markets offering the best return on investment.

In order to implement the Strategy, Tourisme Québec will benefit from a marketing budget of \$38 million in 2001-2002.

2.1 LEISURE TOURISM PRIORITY MARKETS

Priority markets were selected on the basis of Québec's current performance on the markets and variables such as travel abroad, Québec's market share in Canada, growth rates, accessibility, etc., favouring profitable future development.

Markets are grouped according to three master strategies.

Securing and Maintaining Loyalty

This strategy targets mature markets. It implies:

- that current promotional investments by Tourisme Québec remain at the same level; however, investments may be adjusted to take advantage of promising business opportunities. Consider, for example, the metropolitan Toronto market, which shows considerable promise yet remains underdeveloped.
- that the partnership between Tourisme Québec and industry will continue.

The markets are: Québec, Ontario and New England in the United States.

On border markets such as Ontario and New England, the complete range of tourism experiences is promoted by Tourisme Québec and its partners.

* Tourisme Québec, 2000-2005 *Tourism Marketing Strategy*, 2000, 46 p.

	QUÉBEC	ONTARIO	UNITED STATES NEW ENGLAND
Urban stays (summer, fall)		X	X
• City experiences		X	X
Urban stays (winter)		X	X
Tours	X	X	X
• Theme tours		X	X
• Bicycle tours	X	X	X
Resort stays	X	X	X
• Health tourism	X	X	X
• Golf		X	X
Downhill skiing	X	X	X
Snowmobiling		X	X
Cross-country skiing		X	X
Hunting and fishing		X	X
Outdoor adventure	X	X	X
International cruises			X

Investment

This strategy targets markets offering the best potential for development on the short term. This implies:

- that Tourisme Québec focus most of its investment here;
- that promotional strategies will primarily target consumers.

The extent of promotional investment is determined by market development potential. Thus, Level 1 investment will be earmarked for markets with greater promise than Level 2 investment markets, and so on.

Markets are:

Level 1 – United States: Atlantic Centre, France

Level 2 – United States: Midwest, United Kingdom, Germany

Level 3 – United States: South and West, Italy, Japan, Mexico

Tourism experiences promoted on these markets are listed in the table below.

	UNITED STATES ATLANTIC CENTRE	UNITED STATES MIDWEST, SOUTH AND WEST	FRANCE	GERMANY	UNITED KINGDOM	ITALY	JAPAN	MEXICO
Urban stays								
• (summer-fall)	X	X			X		X	X
• City experiences	X							
Urban stays (winter)	X	X						
Tours	X	X	X	X	X	X	X	X
• Theme tours	X							
Aboriginal tourism			X	X		X		
• Bicycle tours	X							
Resort stays	X				X		X	
• Health tourism	X							
• Golf	X							
Downhill skiing	X				X			X
Snowmobiling	X		X			X		
Cross-country skiing	X							
Hunting and fishing	X		X					
Outdoor adventure	X		X	X	X	X		
International cruises	X	X						

Canvassing-Prospecting

This strategy applies to markets whose potential for development must be assessed, and implies:

- a smaller investment in promotion;
- changing promotional vehicles depending on market potential (trade missions, action taken with industry intermediaries such as wholesalers and tour operators, press relations, etc.).

Markets include Belgium, Switzerland, the Netherlands, Scandinavia, Spain, Brazil, Argentina, South Korea, Taiwan, Hong Kong, Australia, New Zealand.

On these emerging markets the lead-in product is, unquestionably, the tour promoted as comprehensive or partial (FIT or Foreign Individual Traveller), organized and sustained by close partnership between Tourisme Québec and foreign travel wholesalers.

	BELGIUM, SWITZERLAND, THE NETHERLANDS, SCANDINAVIA, SPAIN	SOUTH KOREA, TAIWAN, HONG KONG, AUSTRALIA, NEW ZEALAND
Tours	X	X
• Aboriginal tourism	X	
Outdoor adventure	X	

2.2 MEETINGS, CONVENTIONS AND INCENTIVE TRAVEL PRIORITY MARKETS

Meetings, conventions and incentive travel group together different client segments:

- convention clients,
- business meeting clients,
- incentive travel clients.

The performance of meetings, conventions and incentive travel is based primarily on the economic vitality and the intensity of economic relations between Québec and other countries. This is especially true of business meetings.

The variable also applies to conventions and incentive travel, however, their performance is strongly influenced by promotional activities.

Selection of priority markets in the meetings, conventions and incentive travel market segment must consider:

- countries that have close economic relations with Québec;
- countries with economic sectors closely mirroring the most dynamic sectors of activity in Québec (for example, biotechnology, pharmaceuticals, aeronautics, finance, insurance, high technology, automobiles and the agri-food industry);
- areas or cities in the United States that are headquarters of associations or major businesses.

Master strategies and products to promote vary, depending on the market.

The American Market

The growth of meetings, conventions and incentive travel tourism from the United States is escalating much more rapidly than leisure tourism. It has evolved by an average 8% each year. Following a decrease (6.7%) in 1999, growth rallied again in 2000 (3.6%).

It is, above all, a meetings clientele; however, convention participants nonetheless generated close to 28% of revenue in 2000.

The originator market for the American clientele of meetings, conventions and incentive travel is much more widespread than that of leisure tourism. Although the Atlantic Centre (30% of travel) dominates, most distant regions, such as the South (22%), Midwest (20%) and West (10%), contributed significantly.

Other International Markets

The clientele from other countries is as much a conventions clientele as a business meetings and incentive travel clientele.

In 1999 nearly half the clientele was European (49%).

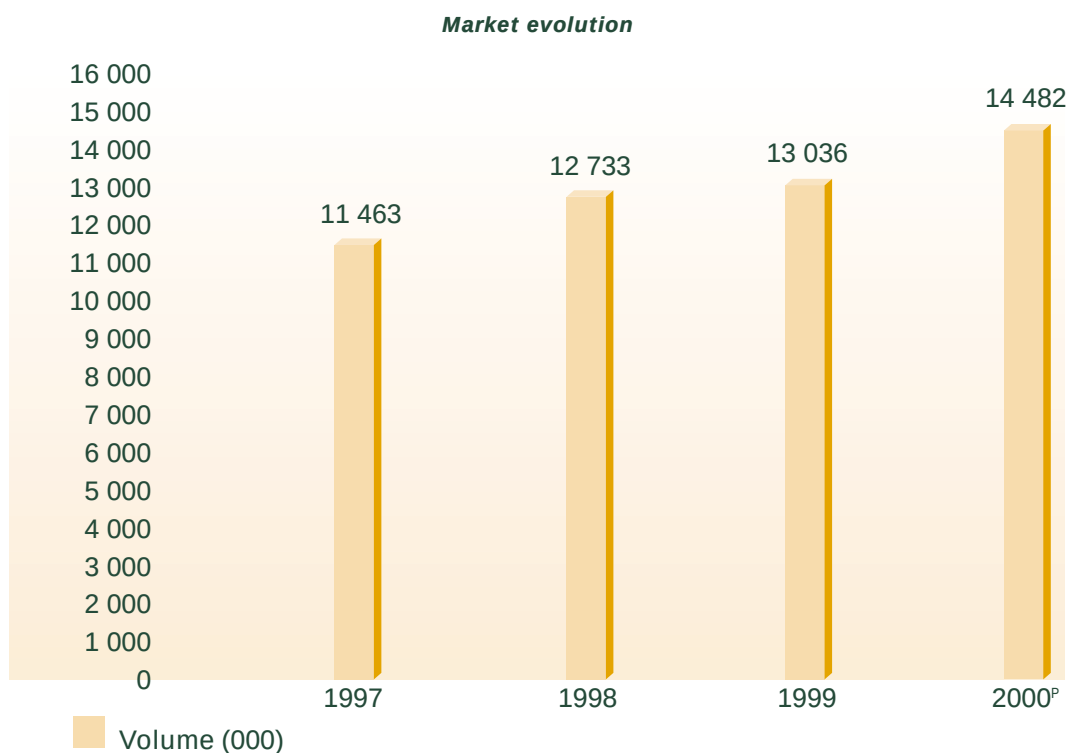
The Asian market accounts for close to a third of all travel in 1999 (34%), and is the market that has gained the most ground in recent years.

Master Strategies	Priority Products	Priority Markets
Investment	Business meetings and incentive travel	Priority # 1: Canada and the United States (New York, Chicago and Los Angeles) Priority # 2: United States (Boston, Atlanta, Dallas and Houston)
Canvassing-prospecting	Incentive travel	Priority # 1: France Priority # 2: United Kingdom (The priority granted to the United Kingdom may be increased because of higher potential than that of France) Priority # 3: Germany Priority # 4: Italy

3 Markets: Analysis and Strategy

Each targeted market has a unique profile. The following is an overview of the situation, the strengths to consolidate and opportunities to explore, as well as marketing strategies and objectives that will enhance the performance of each market.

3.1 QUÉBEC MARKET



Sources: Statistics Canada, *International Travel Survey* (ITS) and *Canadian Travel Survey* (CTS)
P= Preliminary estimates of Statistics Canada that are subject to revision

A Market in Need of Renewal

Québec is the prime market for the province's tourism industry, particularly for tourist regions other than Montréal and Québec City. Québec Province is the leading travel destination of Quebecers. In 1999 69% of trips made by Quebecers were inside Québec, but travel expenses accounted for only 36%. The difference may be explained by a preponderance of short stays. Indeed, travel decisions are often taken at the last minute. Accordingly, the decision to travel is affected, here more than in other markets, by imponderables that have a considerable bearing on market performance.

In spite of Quebecers' loyalty to domestic tourism, they can no longer be considered a captive market. Quebecers have become used to travelling to other destinations: they have become sophisticated tourists.

The Canadian Tourism Research Institute anticipates yet another substantial increase in travel inside Québec by Quebecers in 2001. The increase should be 3.5% in terms of volume and 7% in terms of revenue.

Strengths to Consolidate and Opportunities to Explore

- The integration of Tourisme Québec's television campaign (winter and summer 2000) with that of two tourism regions resulted in increased visibility for Québec's tourism products taken as a whole. The use of an integrated concept strengthened Québec's image as a destination among consumers.
- Moreover, the promotional partnership with Ultramar (distribution of 3,380,000 package insets, totalling \$38 million in rebate coupons) provided exceptional media coverage of Québec as a destination.
- Campaigns figured prominently among consumers.
- Promotion of the destination among Anglophone and allophone clienteles continued in 2001, with television advertising during the summer and winter. Indeed, these customers account for over a third of the population of metropolitan Montréal, which constitutes the main pool of Québec tourists travelling in Québec.
- Globally, thanks to an increase in partnerships, investments in joint advertising activities increased considerably.
- Packaging certain tourist experiences (urban stays, resort stays, skiing packages) benefited from the publication of package deal guides (CAA-Québec, Société des fêtes et festivals with the *Carnet voyage Québec*, regional tourism associations, etc.).
- The marketing of special products was enhanced, thanks to partnerships with specialized TV networks (Canal Évasion, PBQ).
- Québec's economy is expected to perform well in 2001. Disposable income should increase as a result of tax cuts announced by both levels of government.

Challenges

- Québec's positioning as a tourist destination is too vague and does not place enough emphasis on the depth of Québec's tourism product. The new product is largely unappreciated by clientele.
- Harmonization of promotional efforts by various partners (Tourisme Québec, RTAs, sectoral associations, the private sector) needs to be refined. An increase in the participation of RTAs in Tourisme Québec's TV campaign would improve both the efficiency and the effectiveness of regional tourism association (RTA) investments through production cost management by Tourisme Québec and the possibility of negotiating better rates with networks.
- The plethora of existing campaigns does not encourage converting travel intentions into purchasing decisions. Advertising is not always supported by marketing tools.
- Campaigns focus excessively on tourist regions rather than natural regions, grouping of similar tourism experiences and the promotion of tourist experiences currently exported on international markets.
- Promotional campaigns do not make sufficient allowance for the segmentation of client groups and, in general, changes in habits (example: short stays) and values espoused by Québec customers.
- Promotional efforts are too highly focused on summer. The potential of winter and fall is underdeveloped.
- Competition from close quarters is ever-present. New Brunswick and the Canadian Tourism Commission continue to solicit consumers from Québec; Prince Edward Island and Nova Scotia are attempting to imitate the success achieved by New Brunswick. In addition, American competition is intensifying, with travel by Quebecers to the United States increasing by 4% in 2000.

Strategies and Action Priorities

Positioning

Vacationing in Québec provides a great source of satisfaction, owing to the variety of activities offered. The objective is to position Québec as a contemporary, modern destination and to stimulate demand.

Target Markets

Montréal (French, English), Québec, Trois-Rivières, Sherbrooke

Target Clienteles

Aged 25-54

Family income of \$50,000 or more

Theme

Les vacances au Québec, c'est l'idéal

Québec, it's just perfect

Marketing Strategies

Advertising

- Four televised messages (two in French, two in English) in summer and in winter, and a radio campaign. Like last year, the concept will showcase several tourist regions.
- Promotional partnership with an RTA (Saguenay–Lac-Saint-Jean) and with the Association des stations de ski du Québec.
- Partnership with the ATR de la Gaspésie consisting of providing telephone call answering services during their advertising campaign and follow-up of requests for tourism information.
- Joint promotion with Ultramar and Wildcat (Labatt) beer.

Press Relations

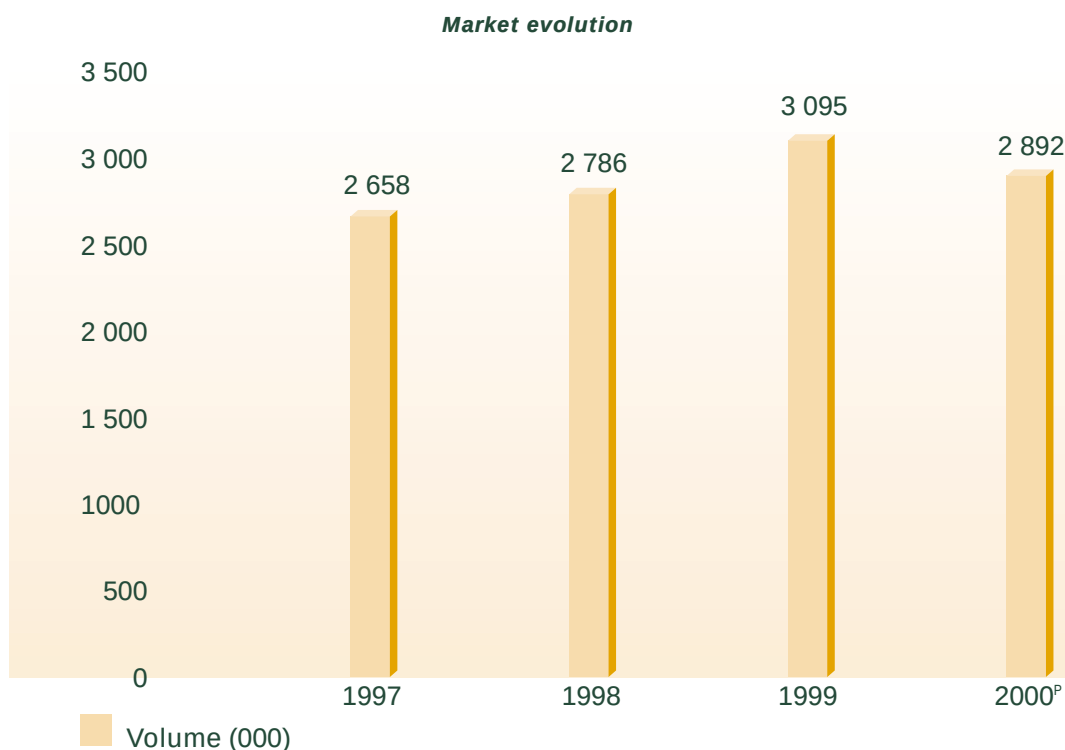
- Maintain close personal contact with tourism reporters.
- Continue publishing an informative bi-weekly booklet and four quarterlies.
- Organize group and individual tours for members of the media (journalists and e-mail correspondents).
- Organize a media event during the Salon vacances et loisirs d'été in Montréal.
- Participate in press conferences with regional partners and industry.

Distribution

- Support the distribution to a million homes of a CAA-Québec (Club automobile du Québec) pamphlet of all-inclusive tourist packages.

3.2 NORTH AMERICAN MARKET

3.2.1 Canada



Sources: Statistics Canada, *International Travel Survey (ITS)* and *Canadian Travel Survey (CTS)*
P= Preliminary estimates of Statistics Canada, subject to revision

An Ontarian Clientele Amenable to Travelling to Québec

Québec has the advantage of being adjacent to Canada's largest tourist-producing market, Ontario. Ontarians account for the largest number by far of Canadian visitors to Québec. In 2000, they accounted for 84% of the number of tourists and for more than 76% of total spending by Canadians in Québec. Like Québec customers, Ontarians are relatively familiar with Québec's traditional products and are faithful to the destination. The Canadian market, which experienced sustained growth since 1997, shows signs of slowing down in 2000, tapering off by an estimated 6.6%. However, expenditures could be on the increase.

Strengths to Consolidate and Opportunities to Explore

- Québec enjoys a good reputation in Canada, particularly in Ontario, because of its proximity and the quality of its tourism products, such as skiing, city tourism and resorts.
- Québec's proximity, good connections between Toronto and Montréal (one hour by air, five hours by car, four hours by rail) help to sell short, frequent stays. This type of tourism is currently in vogue.

- Québec can count on a sizeable captive clientele consisting of Ontarians residing in bordering regions (Ottawa and Eastern Ontario) that are responsible for two thirds of leisure travel of Ontarians to Québec. They are mainly consumers of resort and urban stays. Three regions, Montréal, the Ottawa Valley and the Laurentians, account for three quarters of leisure travel of Ontarians to Québec. Moreover, the large Anglophone and allophone communities in Québec encourage Ontarians to visit with family and friends in Québec, a source of volume as important as leisure travel.
- Québec's bureau in Toronto provides the tourism industry with significant assistance in marketing its tourism products.
- There is a revival of interest on the part of the Québec tourism industry in the Ontario market.
- Last year Québec benefited from more extensive press coverage.
- In 1999 Québec made good on its intention to increase promotional investment by doubling its advertising budget.
- The economic situation in Ontario will continue to flourish in 2001. In recent years, disposable income has risen appreciably in Ontario, thanks to provincial tax cuts.
- Prospects for 2001 are very favourable: the CTRI and Tourisme Québec forecast a 3.0% increase in travel by Canadians to Québec and a 13.2% increase in revenue.

Challenges

- Toronto and Vancouver are putting up strong competition for business decision-makers.
- More emphasis could be placed on promoting specific tourism products.
- Except for skiing and the cultural difference, Québec offers similar experiences to those found in Ontario.
- Clienteles in Ontario are underdeveloped, particularly in the Toronto area, with its 4.5 million consumers. In 2000 only 20% of leisure travel to Québec by Ontarians was attributable to Torontonians.
- The strong US dollar works in Québec's favour, but like Quebecers, Ontarians again began to travel to the United States in larger numbers in 1999 (increase of 5.5%).
- Competition is fierce. Tourism Ontario has heightened its promotional efforts to incite Ontarians to travel within Ontario. The western and Atlantic provinces are also very active on the Ontario market.

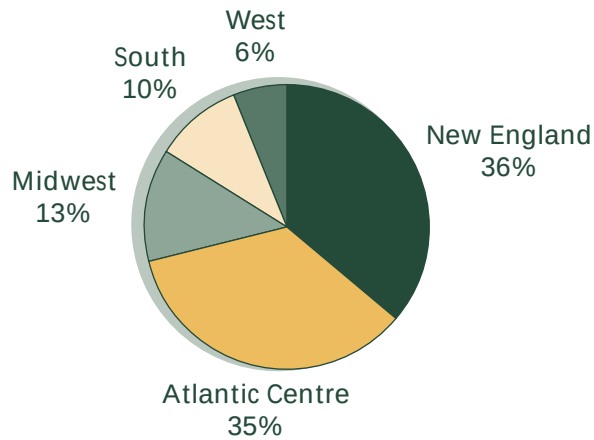
Strategies and Action Priorities

The marketing strategy for the Canadian market is the same as for the American market, since the North American promotional campaign targets both the Canadian and the American markets. Some action priorities that are more specific to the Canadian market will be described in the section on the American market.

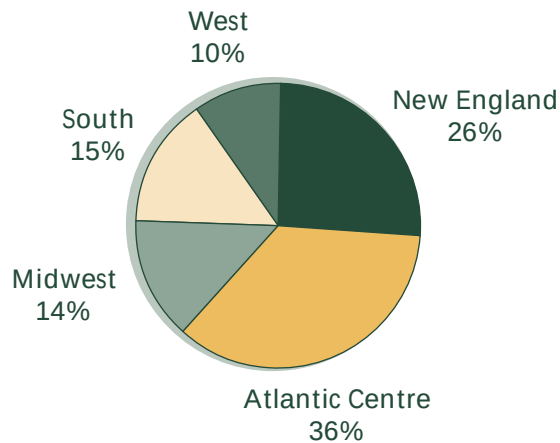
Like Québec and New England, Ontario is acknowledged as a market in need of renewal and development of customer loyalty.

3.2.2 The United States

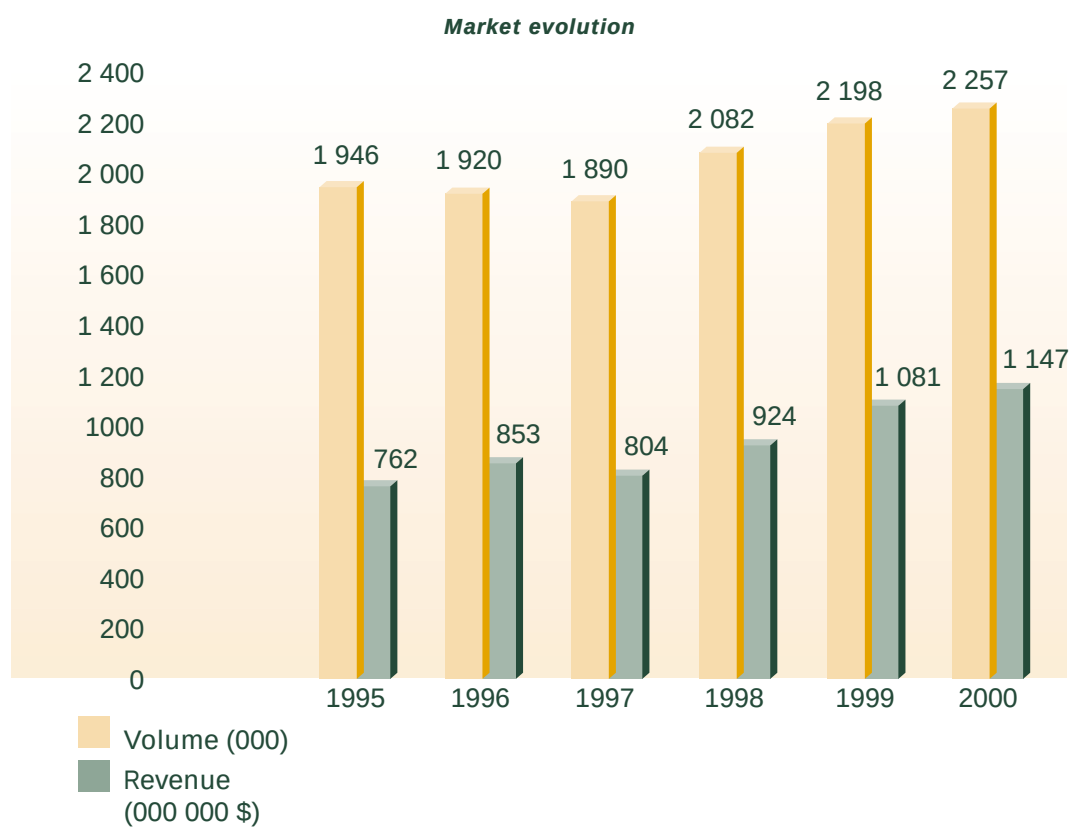
*Source of 2,257 American tourists in 2000
(West, South, Midwest, Atlantic Centre, New England)*



Source of \$1,147 million in tourism revenue in 2000



Source : Statistics Canada, *International Travel Survey (ITS)*



Source : Statistics Canada, *International Travel Survey* (ITS)

A Demanding Market with Enormous Potential

- In terms of volume, American tourism in Québec evolves cyclically, declining from 1991 to 1993, growing from 1993 to 1995, declining from 1995 to 1997 then growing from 1997 to 2000. Recent growth experienced by this market is the strongest observed since the beginning of the 1990s. Revenue has doubled (50.5%) since 1995.
- The CTRI and Tourisme Québec are predicting another productive year of American tourism in Québec in 2001. The number of tourists should increase by 1.8%; spending by 6.1%.

Strengths to Consolidate and Opportunities to Explore

- Opportunities for promotional partnerships between TQ and Québec, Canadian and American players are on the increase.
- Since 1999 Tourisme Québec has refined its advertising strategies in the United States, focusing activity on metropolitan areas offering the greatest potential and placing the emphasis on the following tourist experiences: city excursions, resort vacationing, outdoor activities (soft adventure, hunting and fishing, gardens, skiing, snowmobiling).
- The 2000-2001 winter campaign appears to have been a resounding success, according to a survey conducted among 600 American tourists who came to Québec for an urban experience or alpine skiing in February and March of

2001. The survey confirmed several known items concerning the profile of the American tourist in winter (higher income and education, significant level of customer loyalty). However, it also revealed other interesting aspects to be considered for future development of this market:

- close to 40% of all visitors were visiting Québec for the first time, which indicates that Québec is capable of attracting new clients to its primary winter markets;
 - interest in Québec goes beyond the winter season, because nearly half of the winter visitors had visited Québec previously in the summer;
 - the level of satisfaction is very high: 92% of the tourists intend to revisit Québec in the next two years;
 - triggering elements of the advertising campaign include the combination of televised messages/brochures;
 - the Internet is the preferred means of planning vacations, but travel agents and the skiing telephone number 1 - 800 (skieurs alpins) continue to play an important role;
- In 1999 Tourisme Québec launched an inquiry to periodically assess the effectiveness of its package deal brochure. The objective is to track advertiser perception of the publication and estimate spin-offs associated with their advertising investment in the brochure.
 - Partnership programs have been set up to develop remote markets.
 - Tourisme Québec continued the efforts made in 1997-1998 to bolster the winter market by renewing the special \$5 million budget granted by the government for the winter advertising campaign. This initiative sparked excellent results in terms of promotional efficiency of the destination and the sales volume of partners.
 - A monthly fax sent to more than 10,000 travel agents and automobile clubs (*Québec Travel Info*) helps to make the American distribution network aware of Québec's tourism.
 - In 2000 the publicity value of travel articles on Québec in tourism journals increased. The visibility achieved through press relations offsets the relatively small amount of our promotional investment on this market.
 - Tourisme Québec uses a team of canvassers to develop southern and western markets that could experience growth in years to come.
 - The e-business centre should contribute to improving the level of service to American clientele. This centre will be crucial in promoting sales and in improving our knowledge of clientele, ultimately leading to the ability to refine future marketing strategies.
 - American tour operators show interest in new products, particularly relating to individual travel and travel leading to personal growth and fulfilment.
 - Québec offers tourist experiences in great demand by customers who are financially comfortable, namely the 55+ age group, baby boomers and gays.
 - Increasingly, Québec's tourism industry is acknowledging the contribution of the distribution network and is more willing to pay commissions to agents. The fierce competition among airlines means that travel agents will play a strategic role in the sale of travel packages.

- Markets are becoming fragmented and new customer segments are emerging. Markets expected to experience strong growth are the Hispanic market, the gay market and the seniors market, which will become increasingly segmented.
- Tourisme Québec's telemarketing service for business tourism increased its activity in 2000. 5,309 customers listed in Tourisme Québec's database under convention and business meeting clientele were contacted. 23% of these business contacts are considered potential clients and have been referred to regional consultants for appropriate action.
- The market outlook for business meetings appears positive this year: Trade increases outside the North American free trade favour such expansion.
- The business meeting sector is undergoing deep-rooted change. Upsurges in new technology, globalization and company mergers are shattering the workplace, making meetings a necessity. More and more business meetings will be oriented towards leisure, towards the consolidation of a corporate culture. Moreover, between now and 2005 we foresee that 50% of business travellers in the United States will be women.
- The market for small business meetings is the one that will experience the most growth. Timeframes for planning business meetings are becoming shorter and shorter.
- With unemployment at an all-time low, incentive travel is at the focal point of strategies implemented by companies to recruit and retain employees. The size of incentive travel groups is decreasing. Programs in demand are more diversified than before. Sports and soft adventure activities are sought out and, consequently, cruises and resort villages are gaining in popularity.
- In spite of inflationary pressures, the US economy should experience another year of certain growth in 2001. The GDP is expected to increase by 1.8%.

Challenges

- Americans know Montréal and Québec City fairly well, but they know little about other tourist regions.
- Certain prejudices concerning Québec (language, cold winters) sometimes thwart efforts at promoting destinations.
- Some niche markets remain underdeveloped. There is a high rate of repeat business (tourists who have been to Québec before) among American customers. This situation threatens Québec's long-term performance on this market.
- The Québec tourism industry's interest in this market has been equivocal.
- The weak Canadian dollar makes Québec very competitive, but this is not acknowledged by customers who, regardless of this advantage, view our products as expensive (quantity/quality/price). Recent hikes in gas prices reinforce this perception.
- Most Americans have only two weeks for their annual vacation and, accordingly, are highly selective about their vacation destination. Moreover, the annual average number of working hours is on the increase in the United States, now surpassing that of Japan. Americans' disposable income is growing, while their travel time is shrinking. More than half of all annual vacations are taken on long weekends.

- The United States is the world's largest originator market. It is intensely solicited by all tourism destinations, including individual American states. In 1999-2000 various states in the U.S.A. spent US \$644 million on tourism marketing and development, representing an increase of 13% over 1998-1999.
- There is strong competition from Vancouver in the business meeting sector.
- The assessment of advertising tool spin-offs by advertisers (package deal brochures) leaves much to be desired.

Strategies and Action Priorities (2001-2002)

Positioning

Tourisme Québec's campaign will highlight the advantageous exchange rate for Americans that gives them the best value-for-dollar in North America. Additionally, the following tourist experiences will be promoted:

- urban tourism
- tours
- resort stays
- outdoor adventure
- hunting and fishing
- alpine skiing, cross-country skiing, snowboarding
- snowmobiling

This campaign will showcase the diversity of tourism experiences offered by Québec other than the traditional ones known to Americans. It will target customers who have an interest in these types of experiences. In terms of conventions, business meetings and incentive travel, Tourisme Québec will support efforts made by the tourism bureaus in Montréal and Québec.

Target Markets

Securing and maintaining loyalty	Ontario New England
Level 1 Investment	Atlantic Centre
Level 2 Investment	Midwest
Level 3 Investment	South and West

Target Clienteles

Markets	Consumers	Industry
Canada United States/ Securing and maintaining loyalty Level 1 investment	35-54 age bracket family income exceeding \$75,000 CDN OR US	– tour operators – travel agents – automobile clubs
United States/ Level 2 and 3 investment	55+ age group family income exceeding US \$75,000	– travel agents – automobile clubs

Theme

All promotional files are grouped on the Internet under BonjourQuebec.com and the 1 877-266-5687 line.

Marketing Strategies

Advertising

Tourisme Québec's and its partners' campaigns will have two phases:

- summer/fall: circulation from the end of April 2001 to August 2001
- winter: circulation from September 2001 to March 2002

Means of communication used in this campaign:

- brochures
- consumer magazines
- industry magazines
- daily newspapers
- television
- radio
- faxes to industry professionals
- direct marketing
- mailing tourist information
- the Internet

As a guide, the following is a summary of the means of communication used by Tourisme Québec and its participating partners for the Summer 2001 period:

- two brochures to launch the campaign, *Cities, Excursions and Resorts* and *Great Outdoors* (550,000 copies);
- promotional inserts in daily newspapers (some 3,500,000 copies);
- advertising in industry magazines to elicit demand from travel agents and automobile clubs;
- advertising in consumer magazines;
- ads in major Boston and Toronto dailies;
- television: telecasting a message specific to certain products on some American networks;
- faxes to industry professionals: monthly faxes with information for over 8,500 travel agents and automobile clubs as well as 1,500 travel wholesalers and tourism reporters.
- direct marketing: mailing of more than 120,000 copies of the brochures used during the campaign launch to people who had requested information on Québec in the past;
- direct marketing: mailing of more than 300,000 copies of marketing items to remote markets;
- Pixel-type electronic signage for the Toronto market;
- mailing tourist information: responding to individual requests for brochures from Tourisme Québec and its partners;

- promoting participating partners on the Tourisme Québec Web site.

For the winter phase of tourist products, Tourisme Québec tabled a partnership campaign proposal containing points listed below for review by work groups:

- *winter sports, resorts and urban stays* (American and Ontarian markets). A package deal brochure will be distributed in response to requests for information and during promotional campaigns.
- *snowmobiling* (American and Ontarian markets). An insert to be distributed to 200,000 snowmobile enthusiasts. In November and December 2001, advertising in specialty magazines.
- *cross-country skiing* (American and Ontarian markets). An insert to be distributed to 160,000 targeted consumers and other inserts in specialty magazines.
- *winter sports, resorts and urban stays* (Ontarian market). The ads will be purchased in Toronto dailies for the purpose of soliciting immediate booking by consumers.

In addition to this program, other means of communication will also be used (ads in newspapers, TV, mailing tourist information, promotion of participating partners on the Tourisme Québec Web site).

Business Meetings, Conventions, Incentive Travel and Leisure Travel

- Update the business meeting, incentive travel and leisure travel segment of the database at the disposal of travel counsellors in the United States.
- Work in close cooperation with Tourisme Montréal, the Office du tourisme et des congrès de la Communauté urbaine de Québec and convention centres on the associative market.
- Canvass a new clientele for these segments.
- Meet the objective of 54,000 calls in 2001-2002, reach 14,200 clients and generate 440 business opportunities and close to 300 sales.

Press Relations

Canada

- Organize press meetings in Toronto.
- Organize and direct individual and group press tours for newspaper reporters and e-mail correspondents.
- Maintain close contact with the media and tourism journalists.
- Attend monthly and yearly meetings of writers' associations (Canadian chapter of the Society of American Travel Writers, Travel Media Association of Canada, etc.).
- Publish an information bulletin twice a year (*Québec Trip Talk*).

United States

- Maintain close contact and establish new contacts with specialized journalists and regional and national journalists.
- Participate regularly in press meetings, particularly those organized by Air Canada in Los Angeles, Chicago and Boston.

- Maintain close relations with Air Canada.
- Attend monthly and annual meetings of various writers' associations (e.g.: North American Ski Journalists Association, Society of American Travel Writers, Eastern Ski Writers, Outdoor Writers Association of America, etc.).
- Participate actively in the *Canada Media Marketplace*.
- Participate actively in the Shot Show (hunting and fishing media specialists).
- Direct individual and group press tours in regions of Québec on the basis of priority positioning criteria.
- Organize a series of TV productions with television networks.
- Organize tours for the three most popular hunting and fishing magazines.
- Organize radio promotions on the west coast of the United States.
- Participate technically and financially in a tour organized for the gay press.

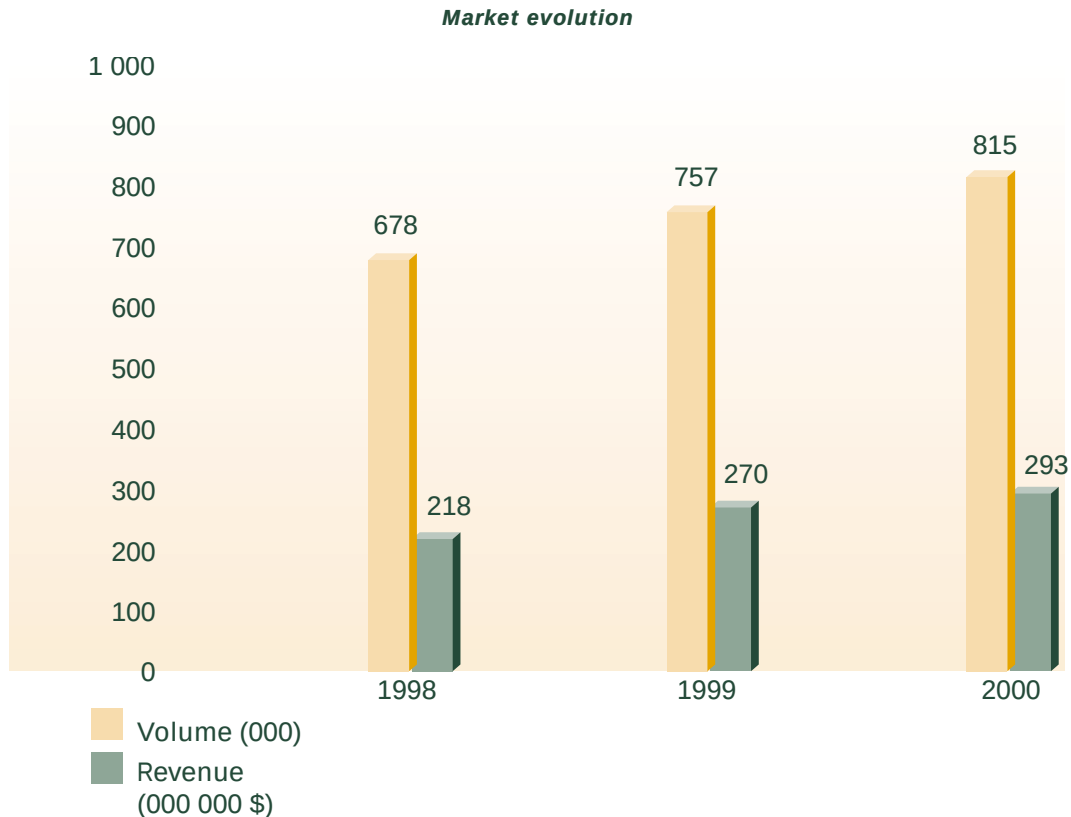
Distribution

Canada

- Approach tour operators open to offering innovative packages in Québec.
- Intensify promotional efforts with high-potential client groups and identify new niches within the seniors market.
- Work closely with the CAA and the motor coach operators.
- Continue to support wholesalers, particularly in the distribution of skiing products.
- Carry out an extensive telemarketing operation targeting the business meeting, convention and incentive travel markets.

United States

- Québec's visibility in the four major American cities of New York, Chicago, Dallas and Los Angeles will be improved in 2001-2002 by strengthening Tourisme Québec's canvassing network.
- Promotional efforts geared to the gay clientele will be maintained and focus on supporting the candidacy of Montréal for the 2006 Gay Games.
- Travelling workshops for nonprofit in travel agencies will be continued.
- Vertical soliciting in market niches such as amateur gardeners and horticulturists will continue.



Source : Statistics Canada, *International Travel Survey (ITS)*

NEW ENGLAND

(Maine, Rhode Island, Massachusetts, Vermont, New Hampshire)

The New England market is considered to be a mature market that Québec should seek to maintain and secure customer loyalty. The new canvassing region of New England encompasses a clientele quite familiar with Québec as a tourist destination. However, the clientele must be made aware of the diversity of tourism products offered in order to renew their interest in Québec.

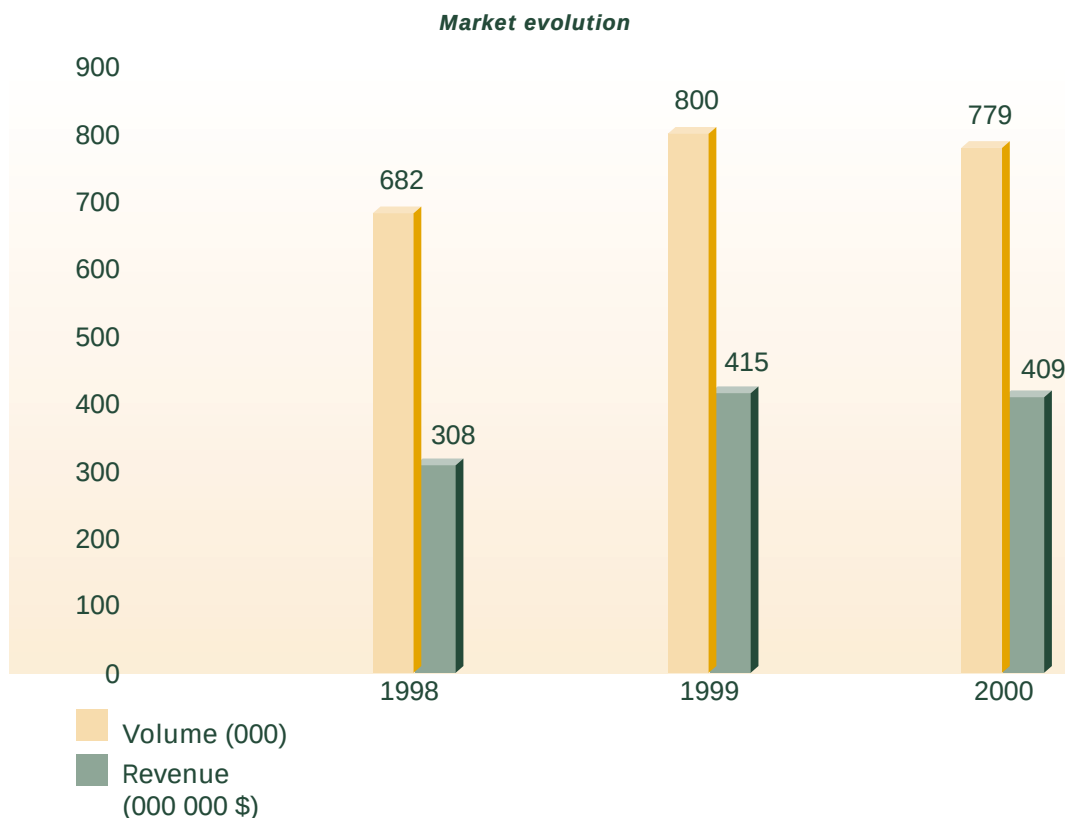
- The New England sub-market accounts for the highest volume of visitors to Québec. It is the only region in the U.S. where more tourists visit Québec than Ontario. However, with a population of 10.2 million, it is the least populous of the canvassed regions in the U.S.A.
- This traditional Québec market has performed well since 1992: strong growth from 1992 to 1994, followed by a slowdown in 1995-1996. In the last three years this market has increased significantly in terms of volume of tourists (20.2%) and revenue (34.4%).

Action Priorities

- Cultivate relations with tour operators.
- Maintain the most promising trade missions.
- Increase the number of consumer-targeted activities.
- Favour the following client segments: horticulture, culture (music, cinema), outdoor activities.
- Contact and follow-up business opportunities catalogued in 2000.

ATLANTIC CENTRE

(New York, Pennsylvania, New Jersey, Connecticut, Maryland, Washington D.C., Delaware, Virginia and West Virginia)



Source: Statistics Canada, *International Travel Survey* (ITS)

For several years Atlantic Centre has been the sub-market generating the greatest number of tourists and the most revenue. After stagnating for awhile, the market recovered in 1999 to again peak in 2000. The volume of tourists (- 2.6%) and revenue (- 1.4%) experienced a slight decrease in 2000.

As the American sub-market with the greatest potential for development for Québec, Atlantic Centre falls under the Level 1 investment strategy.

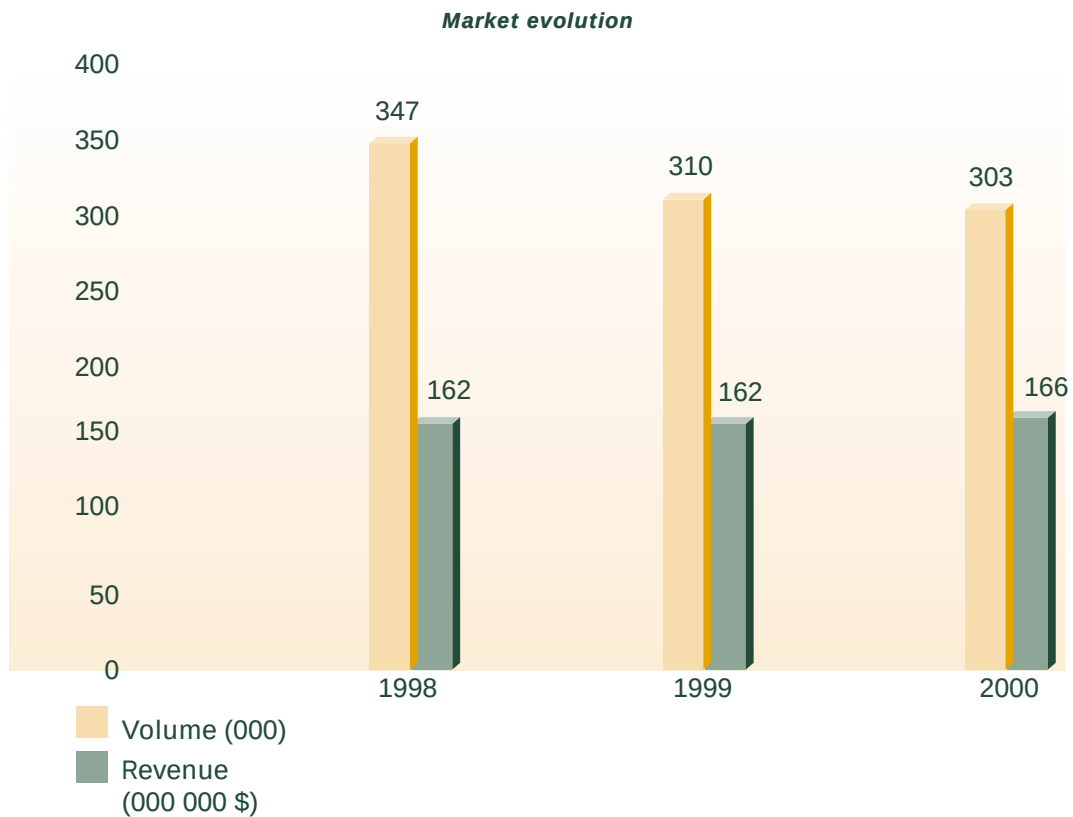
Action Priorities

- Raise the visibility of Québec as a tourist destination with consumers.
- Continue canvassing activities with tour operators and ski clubs.
- Maintain promotional efforts with retirees aged 55 and older.
- Continue information and training initiatives with American travel agents.
- Pursue action aimed at new market segments (pilgrims, horticultural societies, gays, golfers, etc.)
- Heighten representation among potential business tourism and incentive travel clientele.

Atlantic Centre, the South and the West are indisputably markets that hold great promise, with strong economic and demographic growth potential. Large companies are locating there, as are retirees looking for a milder climate. Tourists from these regions tend to travel by air rather than by car to visit Québec. They stay longer and spend more.

MIDWEST

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



Source: Statistics Canada, *International Travel Survey* (ITS)

- The Midwest ranks third as a sub-market in terms of volume of tourists and revenue. A level 2 investment strategy will be applied here.
- This region comes second in the United States for the number of national and international associations with head offices in the region. Incentive travel is also firmly established.
- This sub-market has been relatively stable since 1998. A slight decrease in the volume of tourists (- 2.3%) was recorded in 2000; however, revenue increased (+ 2.5%) in comparison to 1999.

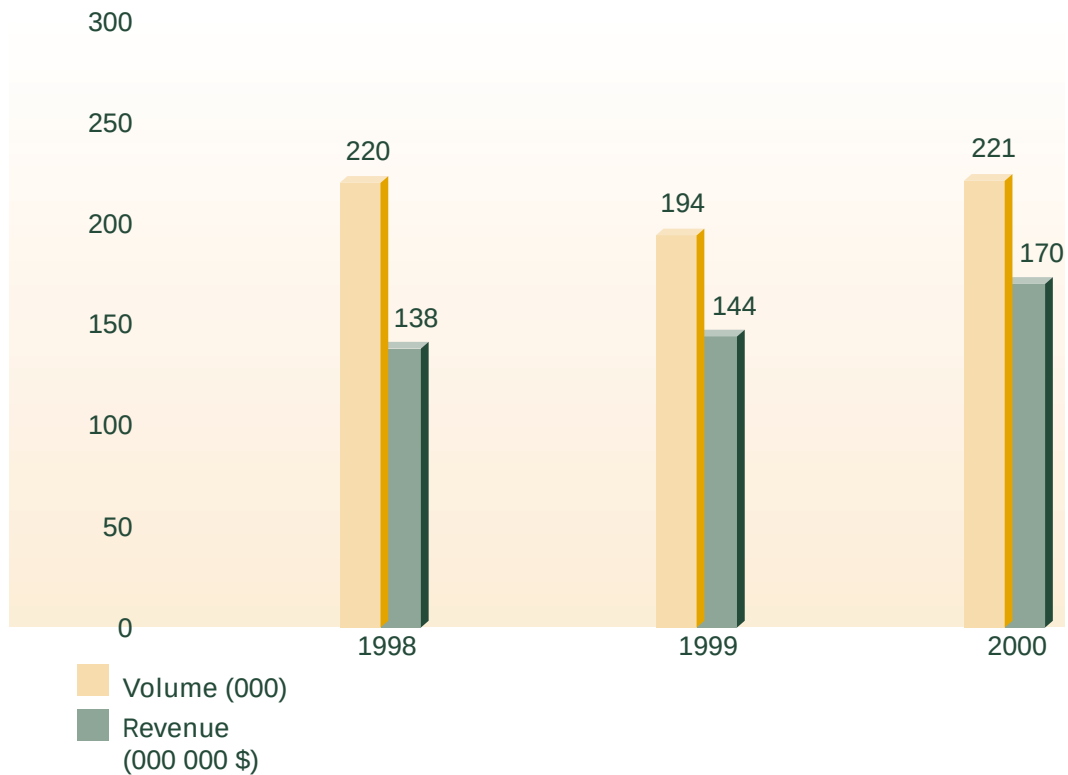
Action Priorities

- Continue to raise Québec's visibility with the distribution network through a range of representative activities.
- Intensify press relations.
- Target automobile clubs and group multipliers (skiers, seniors) to promote leisure tourism.
- Continue telemarketing in the leisure and business tourism sectors and complete the database on these clientele.
- Intensify representation among potential business tourism and incentive travel clientele.

SOUTH

(Alabama, Tennessee, Mississippi, Arkansas, Louisiana, Florida, Georgia, South Carolina, North Carolina, Texas, Oklahoma, New Mexico)

Market evolution



Source: Statistics Canada, *International Travel Survey (ITS)*

- The Southern United States is a market with sufficient developmental potential to justify a Level 3 investment strategy.
- In decline from 1995 to 1997, the South experienced a clear upturn in 2000. Increases in the volume of tourists between 1999 and 2000 rose 13.9% and revenue 18.1%.

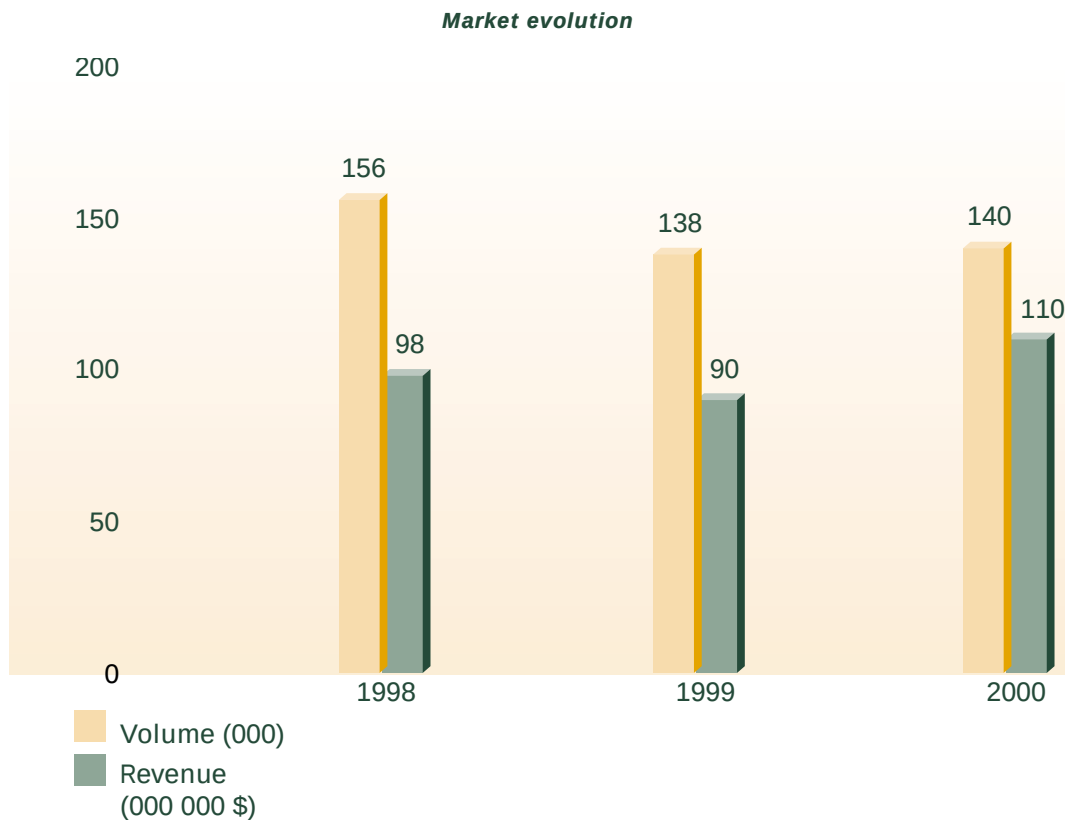
- In spite of the Open Skies agreement, development of this market is hampered by the lack of direct flights between several of its large cities and Québec, although the situation is improving.

Action Priorities

- Continue to raise Québec's visibility with the distribution network through a range of representative activities.
- Continue telemarketing in the leisure and business tourism sectors.
- Intensify press relations activities and coverage on the radio.
- Continue promotional agreements with tour operators.
- Continue informing and training travel agents about the destination.

WEST

(California, Oregon, Washington, Alaska, Idaho, Nevada, Utah, Arizona and Hawaii)



Source: Source: Statistics Canada, *International Travel Survey* (ITS)

Like the South, the West holds sufficient developmental potential to justify a Level 3 investment strategy.

- The western market experienced a slight upswing in 2000. The increase in the volume of tourists was minimal (+1.4%); however, revenue rose sharply (+22.2%) in contrast to 1999.

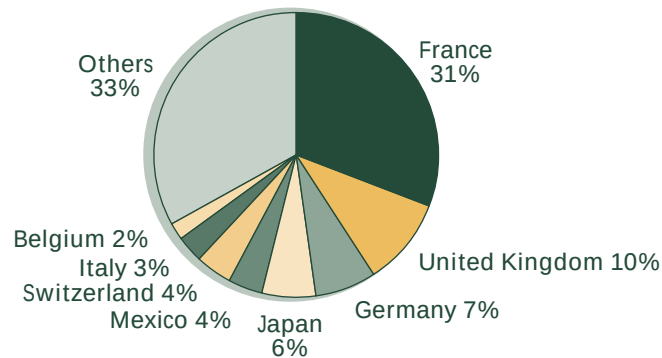
- In comparison to other Americans, the residents of this region are those with the greatest propensity for travel outside the United States. They seek unusual, action-packed tourist experiences.

Action Priorities

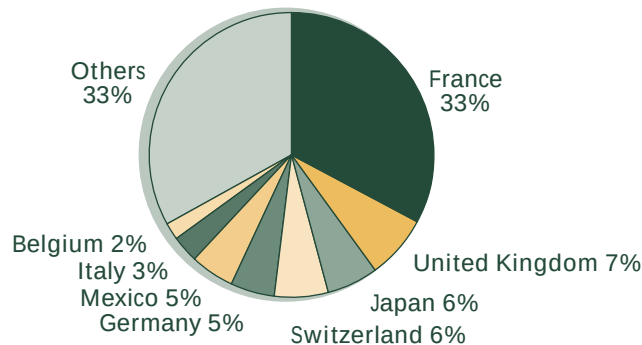
- Continue to work with Canadian partners (Air Canada, Hôtels Fairmont, etc.), to promote Québec in this region of the United States.
- Continue to work with current partners (Travel Related Marketing, Associated Television International) and explore new projects in the domain, on TV and on the radio.
- Continue direct marketing based on existing databases.
- Continue press relation activities.
- Intensify representations among potential clients in the incentive travel and business meeting sector.
- Promote the Tourisme Québec Web site among distribution network players.

3.3 OTHER INTERNATIONAL MARKETS

Distribution of the 1.315 million tourists in 2000

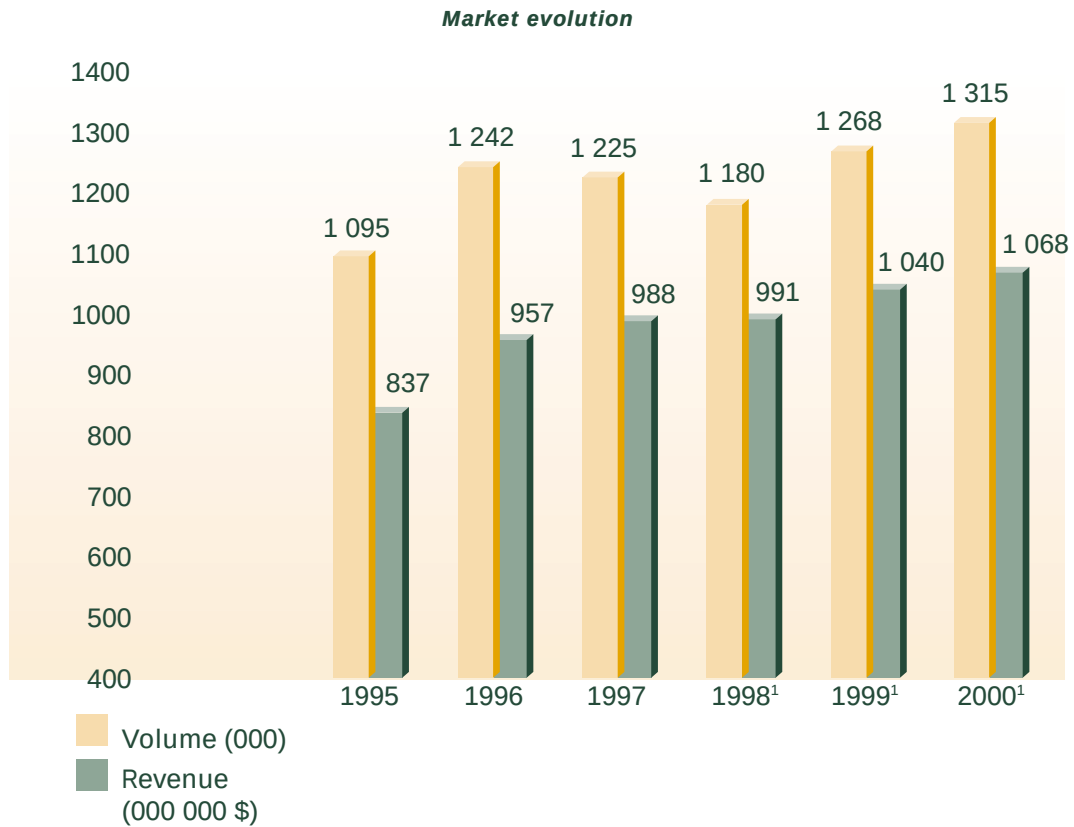


Distribution of the \$1,068 million in tourism revenue in 2000



Source: Statistics Canada, *International Travel Survey (ITS)*

1 = Data adjusted by Tourisme Québec on the basis of border crossings



Source: Statistics Canada, *International Travel Survey (ITS)*

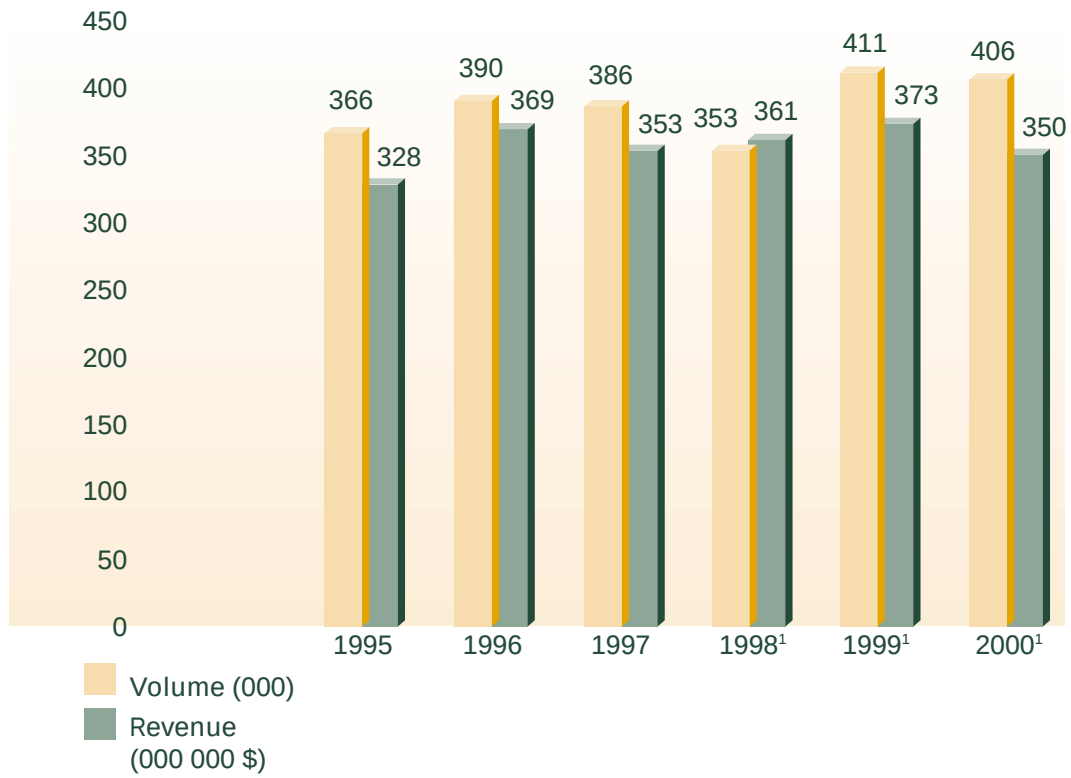
1 = Data adjusted by Tourisme Québec on the basis of border crossings

After three sluggish years, the foreign countries market experienced an upswing in 1999 that continued in 2000 with a 3.7% increase in the volume of tourists and a 2.7% increase in revenue.

In 2001 the CTIR foresees that growth will continue with an anticipated 3.1% increase in the volume of tourists and 5.5% in revenue.

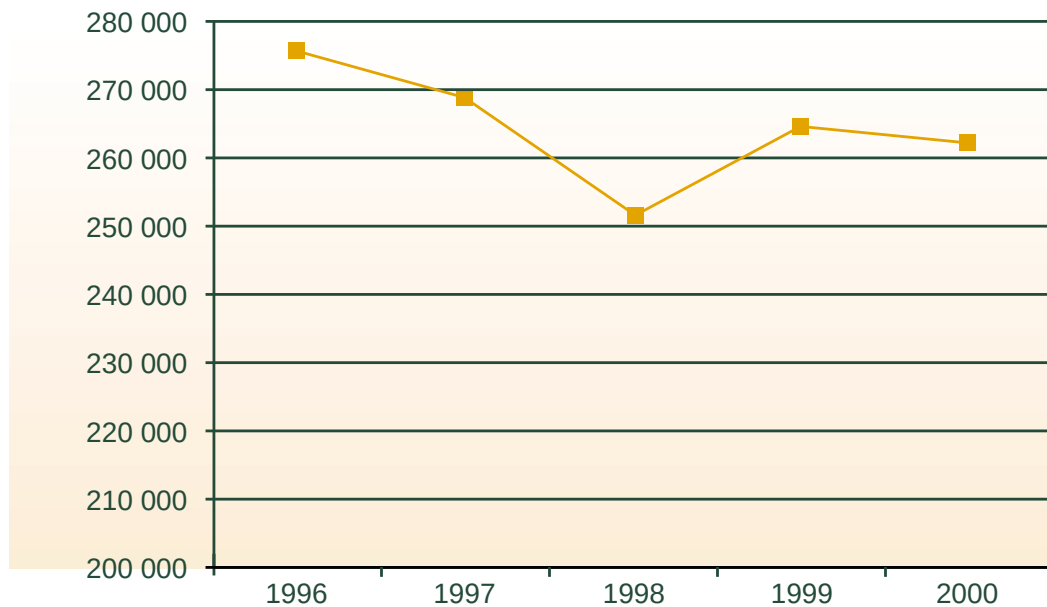
3.3.1 France (Belgium)

The Tourisme Québec canvassing team that covers France also covers Belgium. As a priority market, the investment strategy applied to France is more elaborate than that of Belgium, which ranks lower in terms of development potential.

Evolution of the French market

Sources: Statistics Canada, *International Travel Survey (ITS)*

1 = Data adjusted by Tourisme Québec on the basis of border crossings.

French tourists entering Canada via Québec

Statistics Canada border crossing statistics only cover international tourists arriving directly in Québec. The population targeted by the survey is partial; however, the estimates are of excellent quality.

A Tourist Market Reaching a Ceiling

- Development conditions associated with the French market are excellent. The market represents the best of the European markets for Québec. In 2000 the market accounted for 31% of tourist volume and 33% of spending made by all international clientele, excluding the Americans.
- While the number of visitors continued to increase from 1990 to 1996, numbers stagnated between 1996 and 1998. However, in 1999 the number increased significantly, exceeding the 400,000-visitor benchmark. Results stabilized between 1999 and 2000 (- 1.2%).
- Québec is maintaining its dominant position in Canada in terms of the clientele from France.
- French tourists, along with the Belgians and the Swiss, form a lucrative clientele, as they tend to stay in Québec longer (10 overnight stays on average).
- The habits of French tourists in Québec differ from those of other international visitors:
 - They are the most frequent visitors to regions outside Québec;
 - They also prefer winter the most.
- Recent studies have confirmed the extraordinary potential of the French market. It is estimated that some 9 million French tourists show interest in Canada or plan on visiting here sometime over the next three years.
- For 2000 the CTIR and Tourisme Québec are predicting that the number of tourists should increase by 2.0%; tourist spending by 4.0%.

Strengths to Consolidate and Opportunities to Explore

- The French economy is getting better and better: decrease in unemployment, increase in consumer spending and shorter work hours.
- Québec has a relatively high profile, owing to multi-promotional advertising campaigns (written press, advertising in public places, radio, TV) in cooperation with tour operators.
- The advertising campaign in the Paris Métro to showcase winter produced conclusive results.
- Québec's visibility is excellent. More than 360 articles and reports were published in 2000 under Tourisme Québec management. The advertising value of press stories on Québec reached close to \$19 million in 2000. The French media showed great interest in Québec, opting for different angles and innovative approaches. Québec is also increasingly present in specialty press stories and on TV and radio on shows (health, adventure, ornithology) that highlight new aspects of Québec's tourist products. Media visibility in Belgium is progressing substantially.
- Tourist information services destined for Belgian consumers are now accessible, as they are in France, via a toll-free number (0 800).
- New tourist experiences are emerging: "extreme" winter, short thematic stays, stays in resorts highlighting outdoor activities, à la carte trips (coaches and *Foreign Individual Travellers*) fishing expeditions, winter stays for groups, soft adventure, etc.

- Cooperation with certain tour operators and carriers is excellent (Vacances Air Transat, Canada 3000 Aventure, Montréal airports and Sabena).
- With respect to winter and off-season programs, Québec is well represented by tour operators and incentive travel agencies, offering a diverse selection of products. The demand for incentive travel in winter is skyrocketing. Moreover, many tour operators program long weekends during the off-season.
- Products offered by tour operators during the 2001 summer season are increasingly diversified, owing to the partnership between Québec and New Brunswick.
- Individual clients can count on over 100 tour operators offering programs in Québec. Most focus on nature and related activities.
- Québec's high profile in regional tourist trade shows provides opportunities to meet a great number of consumers from promising regions and to improve Québec's visibility and that of its tourism partners.
- Québec is receiving more and more requests from associations and municipalities to participate in promotional events such as trade shows open to the public.
- More and more travel agents are requesting information, thanks to the monthly fax entitled "Québec en bref" in France and periodic mailings of similar letters to Belgium.
- Increasingly, the French are dividing their vacation time, opting for short trips, making spur-of-the-moment decisions (a phenomenon reinforced by new technologies), seeking out the best quality-price ratios, demanding quality tourist products and travelling abroad.
- Despite the increase in the value of the dollar, Québec is always competitive in terms of price and quality.
- More and more consumers are resorting to e-information (Web and e-mail) to plan their trips to Québec. In 2000 more French citizens had access to the Internet: 22%, compared to 16% in 1999.
- The French seek active vacations in new settings that allow them to travel to different localities and meet local populations. Vacation choice criteria include, safety, family orientation, simplicity and convenience, pleasures of the senses, regard for economy, authenticity, identity, personalization and innovation.
- Québec has many attractions especially appreciated by the French clientele: language, hospitality, exotic changes of scenery, wide-open spaces, environmental concerns, North American lifestyle. French tourists travelling to Québec return home very satisfied.
- The increasing popularity of Québec is leading to a growing market of individual, higher-spending French clienteles than group clienteles.
- Belgian tour operators and distribution agencies are showing greater interest in Québec.
- In the spring of 2001 Air Canada and Air France will add two new daily flights. The summer season will also herald an increase in flights from Nantes, Bordeaux, Toulouse, Marseille, Nice, Lyon and Mulhouse/Bâle. Moreover, the weekly flight between Paris and Moncton will be maintained during the summer of 2001.

Challenges

- The commercial partnership must be strengthened in order to be able to carry out major endeavours.
- It is difficult to reach individual clienteles outside the school vacation period.
- France remains our main tourist competitor. Tourists are facing an abundance of new destinations, including some with substantial financial resources (Thailand, Egypt, South Africa, Australia, India, China, Indonesia, Hong Kong, etc.) investing heavily in advertising and publicity.
- The “extreme” winter product is facing stiff competition from destinations such as Iceland, Lapland, Finland, Alaska and Russia.
- Some clienteles perceive the climate as being too harsh.
- The demand of community groups decreases in May and June.
- It is difficult to persuade the incentive travel clientele to travel other than in winter.
- Québec's reputation in Belgium leaves much to be desired. There is a certain amount of confusion between Québec and Canada.
- The participation of RTAs in consumer shows and travel trade shows could be improved (better coordination).
- The supply of products involving short jaunts to Québec is underdeveloped.
- Airfare is considered high. A lack of direct flights to the Québec region hampers the development of remote regions such as Charlevoix, coastal Québec, Saguenay-Lac-Saint-Jean, etc., particularly in winter.
- The business travel and convention potential remains unknown.
- Since January 2000 the French franc has depreciated more than 4.8% in relation to the Canadian dollar.

Strategies and Action Priorities

Positioning

Québec is a destination where interpersonal relations, human experience and interesting adventures lead to enrichment. Both winter and summer activities are promoted. Main products showcased include tours, aboriginal tourism, resort stays in summer and winter, snowmobiling, hunting and fishing, outdoor adventure and incentive travel.

Target Markets

Paris and surrounding areas, as well as densely inhabited French regions.

Target Clienteles

Consumers with significant disposable income

Consumers who travel in the off-season

Tour operators (pleasure tourism and incentive tours)

Distributors (travel agencies)

Theme

Summer: Le Québec, la Nature à bras ouverts

Winter: Québec, l'hiver à bras ouverts

Marketing Strategy

Advertising

- Winter promotional campaign on various TV networks.
- Advertising campaign in the Paris Metro, in bus shelters in the cities of Nantes, Lyon and Toulouse and in Belgium in partnership with Vacances Air Transat, Canada 3000 Adventure, the airports of Montréal for the summer season and tour operators for the winter season.
- Introduction of a hunting and fishing brochure in France.
- Advertising on Web sites and in specialty magazines (business tourism).
- Radio advertising campaign with partners.
- Advertising in the press and specialized media.
- Direct marketing targeting travel agencies and tour operators in France and Belgium.
- Partnership with New Brunswick for advertising and promotional activities.

Promotion among Consumers

- Editing of the list of French and Belgian tour operators (winter and summer) and distribution among consumers (by mail), during trade shows and on the Web.
- Share in promotional operations with partners (games and contexts, reports, events, etc.).

Press Relations

- Play host to camera crews and journalists during individual and group press tours.
- Support events that showcase Québec and its regions (Harricana, Festival de la Météo, etc.).
- Set up a “Québec en bref” bulletin destined for the media.

Distribution

- Support commercial opportunities arising from the distribution network.
- Participate in trade shows, marketplaces and major salons (France and Belgium).
- Present, position and establish the destination among incentive travel agencies and specialists in France and Belgium.
- Organize familiarization tours for French and Belgian decision-makers in cooperation with a travel agency specializing in incentive travel.

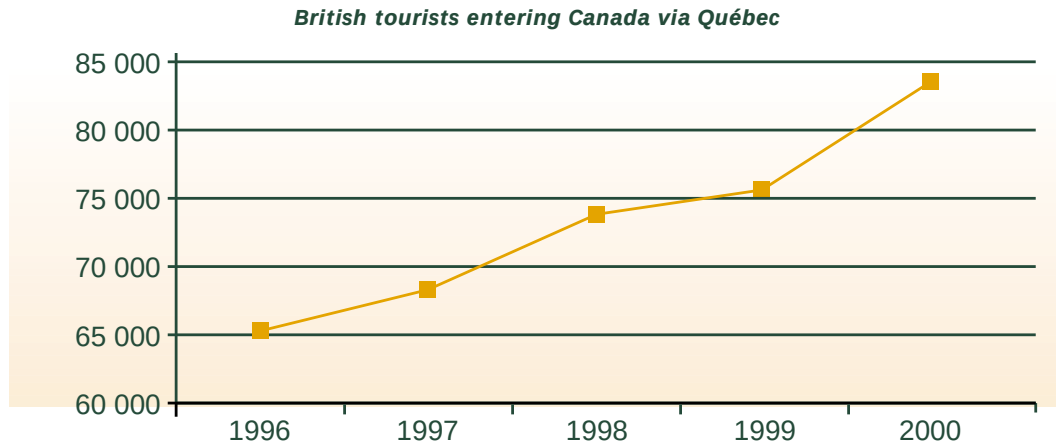
- Organize familiarization tours for tour operators presenting new products.
- Participate in seminars presenting Québec and its products to travel agencies and tour operators.
- Organize a training seminar on the French and Belgian markets for the tourist industry in Québec.

3.3.2 The United Kingdom



Source: Statistics Canada, *International Travel Survey* (ITS)

1 = Data adjusted by Tourisme Québec on the basis of border crossings.



Statistics Canada border crossing statistics only cover international tourists arriving directly in Québec. The population targeted by the survey is partial; however, the estimates are of excellent quality.

Sustained Growth

- The British market has been relatively stable since 1995. After dropping slightly in 1999, the number of tourists increased by 26.4% in 2000. This statistic is confirmed by the results of the survey conducted on border crossings.
- In 2001 the CTRI and Tourisme Québec foresee market stabilization in terms of volume of British tourists (-1.0%) and of revenue (-1.0%).

Strengths to Consolidate and Opportunities to Explore

- An increasing number of tour operators are showing interest in Québec. Tourism products are more diversified (urban stays, winter products, skiing etc.), allowing for longer stays and a lengthened tourist season. These factors have contributed to increased sales for tour operators.
- While Toronto is the chief gateway for British tourists entering Canada, more than 80% of those who visit Eastern Canada spend time in Québec.
- Québec's reputation in the British press is growing.
- Québec sales representatives are increasing their presence on the British market.
- The economy in the United Kingdom is still very strong. However, consumers remain cautious and are very price-conscious.
- Long haul travel is claiming a growing share of the travel market in the United Kingdom.
- Since the summer of 1997, Air Canada has increased its service to Montréal. Tour operators welcomed the transfer of international flights from Mirabel to Dorval.
- With the growing reputation of Québec as a destination, the number of individual trips will increase at the expense of group travel.

- Tour operators increased their range of Québec tourist products for the summer of 2001. The improvement was substantial, particularly in terms of short stays, which should prolong the high season period of tourism. One hundred and thirty tour operators offer programs for Canada and the United States. Twenty-eight among them are very important in terms of the variety of programs offered in Québec.
- Some products offered by Québec have a promising future: short stays in the city, stays in small inns, nature activities and winter products. The future lies in tailored packages offering a variety of activities. With the emergence of Mont Tremblant on the scene, tour operators are showing greater interest in the adult skier segment, since the student skier market for Mont Tremblant and Mont-Sainte-Anne is already well developed. The youth segment offers other attractive prospects, among them holiday camps.

Challenges

- Canada and Québec are still seen as cold and dull, offering little to do. However, this misperception is changing. Québec is viewed as an exotic destination, more sophisticated and interesting than the rest of Canada. More emphasis must be placed on the difference in exchange rates of the Canadian and American dollars.
- Other provinces will prove to be competitive in 2001, particularly Ontario and Alberta, both of which obtained substantial budget increases. British Columbia will focus on consumers, while the Maritime Provinces are providing increasingly stiff competition.
- Air service with Québec City is problematical. Nonetheless, client interest in Québec is growing. Domestic flight connections to Toronto are inadequate.
- Seat capacity to Montréal is inadequate. Moreover, price rates to Montréal are often higher than the rates to Toronto. Finally, tourists prefer regional airports such as Heathrow for departures, favouring Toronto rather than Montréal as the entry point, since Toronto is already connected to several cities in outlying regions of the United Kingdom.
- Québec's image is not as strong as that of Western Canada and Ontario, and the situation is unlikely to improve, owing to the new Virgin Airlines flight from Heathrow to Toronto.
- The British continue to fear that they will not be understood or welcomed by Quebecers.

Strategies and Action Priorities

Positioning

Positioning is based on the following: Montréal, Québec, the French character, fine cuisine, accessibility, safety, the quality/price ratio, wilderness, whale watching and sophisticated cities nearby.

Target Clienteles

Consumers who have visited Canada previously and prefer individual travel
Families seeking a mid-range product
Young people (25 years +) seeking an active vacation
Consumers over 50 looking for high-quality activities involving nature and culture
A new product to develop: garden tours, parks or wildlife watching
Tour operators and travel agents (about 930) specializing in Canada, urban tourism and long haul travel
Incentive tour market
Convention organizers

Theme

Québec 4U*

The 2001-2002 campaign was organized jointly with Jazz-FM. This radio campaign is based on a play on words involving tourism products in Québec and on consumer use of the Web to prepare travel arrangements.

Marketing Strategies

Advertising

- Printed advertising campaign targeting individuals interested in national printed media and metro users, in conjunction with specific promotion of Quebec on the Jazz FM radio station. The advertising refers consumers to the Web site and a designated telephone number.
- Advertising campaign aimed at media industry professionals such as TTG, Selling Long Haul, Travel Weekly and magazines specializing in incentive travel.
- Production and distribution of the *Essentially Québec* brochure, redesigned to suit the Web site image.

Press Relations

- With the HDM Agency acting as a go-between, maintain close contact with members of the press, e-mail correspondents and specialty media.
- Organize press tours consistent with positioning goals on this market.

Canvassing

- Increase distribution network knowledge of the destination in partnership with the Canadian Tourism Commission (CTC) and Ontario. The Ontario-Québec training program is in use again this year, and 7,000 videotapes have been distributed to agents to date.
- More than 1,000 travel agents enrolled in Canada Outlook and followed the training program. In 2001 the emphasis will be placed on training staff working in-house for British wholesalers.
- Promotions in stores: Harrod's and Canadian Affairs.

* Québec For You

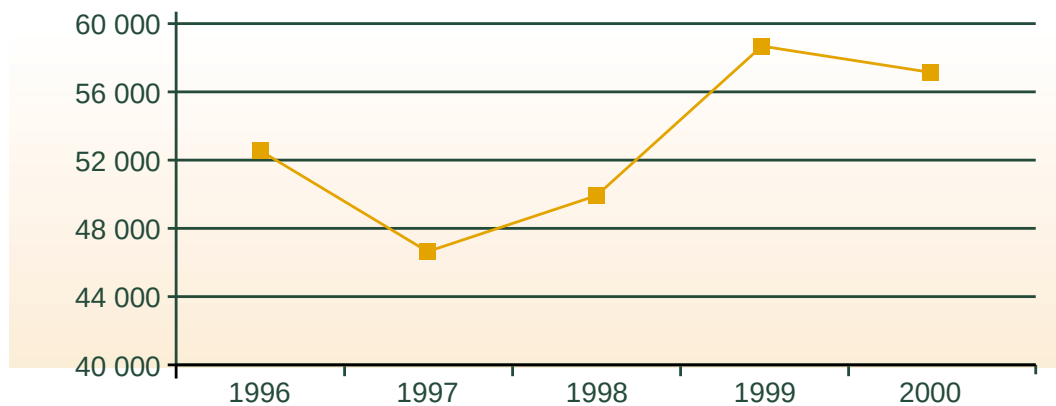
3.3.3 Germany (Switzerland and Austria)

Market evolution in Germany



Source: Statistics Canada, *International Travel Survey (ITS)*
 1 = Data adjusted by Tourisme Québec on the basis of border crossings.

German tourists entering Canada via Québec



Statistics Canada border crossing statistics only cover international tourists arriving directly in Québec. The population targeted by the survey is partial; however, the estimates are of excellent quality.

The Tourisme Québec canvassing team covering Germany also covers Switzerland and Austria. Since Germany is considered to be a priority market, a more substantial investment strategy will be applied than the strategy allocated to Switzerland and Austria.

The Market Remained Stable in 2000

- The German market experienced strong growth from 1994 to 1996 and then fell off in 1997. The upsurge observed in 1998 translated into an average increase of 14% in the number of tourists who entered Canada via Québec between 1998 and 2000.
- In 2001 the CRTI and Tourisme Québec foresee a 4% increase in volume and 7% in revenue.

Strengths to Consolidate and Opportunities to Explore

- Renew and improve the consumer advertising campaign. The campaign raised the demand on the German market by 50%, or 1,800 requests, compared to 900 in 1999-2000.
- Renew the television campaign. In 2000-2001 the campaign resulted in 21,000 requests by telephone and from the Web.
- Most tour operators saw their sales of Canadian products increase in 2000, and the outlook for 2001 appears to be very good.
- Québec is the only Canadian destination with direct representation, which strengthens its credibility as a tourist destination on the German market.
- Interest in Québec has remained relatively stable, with a 2.5% increase in the number of consumer requests and requests from the distribution network. This stability appears to be the result of a decrease in the number of articles published in Québec, the unfavourable exchange rate and greater use of the Web as a source of information.
- Direct flights between Frankfurt and Montréal and between Zurich and Montréal represent an interesting opportunity for the tourism industry in Québec. In addition, there is the weekly Air Transat flight from Frankfurt.
- The supply of packages to Québec offered by tour operators is on the rise as a result of sustained efforts in recent years in terms of canvassing and public relations. Eighty-two tour operators in Germany, 27 in Switzerland and 9 in Austria offer programs featuring Québec.
- A major merger of several wholesalers (TUI and REWE, which controls DER, ITS and LTU and ADAC) is underway. The reorganization will allow these groups to control almost 70% of the market. The development of business relations with these new players could result in a commercial partnership and significant openings for the more traditional Québec tourism products.
- Canvassing of small wholesalers remains the best strategy for marketing more original products such as golf, ecotourism, etc.
- Québec benefits from opportunities to be gained from a certain level of saturation of Western Canada during the summer. The French fact is an advantage on the French-speaking Swiss market. The value of the Canadian dollar against the American dollar should be taken advantage of in 2001-2002.

- Québec is represented by one of the best German press relations agencies. The publicity value of articles on Québec in the German travel press amounted to \$18 million in 2000.
- The economic situation will improve in 2001. Indeed, a 3% increase in the GDP is foreseen.

Challenges

- Québec's market share warrants improvement.
- Canada and Québec are frequently perceived as cold, uninteresting destinations. We lack tourist attractions with an established reputation.
- Germans fear they will not be understood if they speak English in Québec. They perceive Québec as similar to France.
- Competition is very tough because the Germans, with an increasingly difficult economic situation, are more price-conscious than ever. Shorter, less expensive trips are in demand. This should favour tour packages sold by tour operators at the expense of individual travel, because Canada and Québec offer few packages for individual travellers. Also, the Canadian dollar is much more competitive than the American dollar.
- Chartered flights to the destination are available only from June to October.
- Québec is not particularly well known (for example, names of parks are not well known, contrary to Jasper or Banff). Consumers have heard of Montréal, the St. Lawrence, Québec and Indian Summer, but they do not necessarily associate them with Québec. They identify Eastern and Western Canada, but not Québec in particular. Basically, Germans elect to travel to a destination identified simply as Canada.

Strategies and Action Priorities

Positioning

Positioning is based on the following themes: adventure, nature and the outdoors, soft adventure, urban stays in a warm and exciting atmosphere, cultural exchanges and historic sites. The goal is to project a strong image. Québec's French character is an asset (gastronomy, culture, etc.); however, Germans fear that they will not be understood.

Target Clienteles

Wealthy, educated consumers
Couples rather than families
Young retirees
Incentive travel clientele
Wholesalers and travel agents

Marketing Strategies

Advertising

- Printed advertising campaign (daily newspapers) aimed at consumers.
- Printed advertising campaign targeting industry professionals (specialty publications).

Press Relations

- With the assistance of Wilde and Partner, maintain close contact with journalists and e-mail correspondents of specialty press agencies in Germany. Recruit an agency that is experienced in the organization of promotional events in Switzerland in order to enhance canvassing among the media and increase promotions aimed at consumers, in cooperation with wholesalers.
- Organize individual and group press tours with partners, in compliance with positioning objectives.
- Participate in the International Tourism Börse in Berlin.
- Circulate a monthly bulletin via e-mail and publish four quarterly bulletins destined for wholesalers, IATA elected travel agencies and the German-speaking media of Europe.

Canvassing

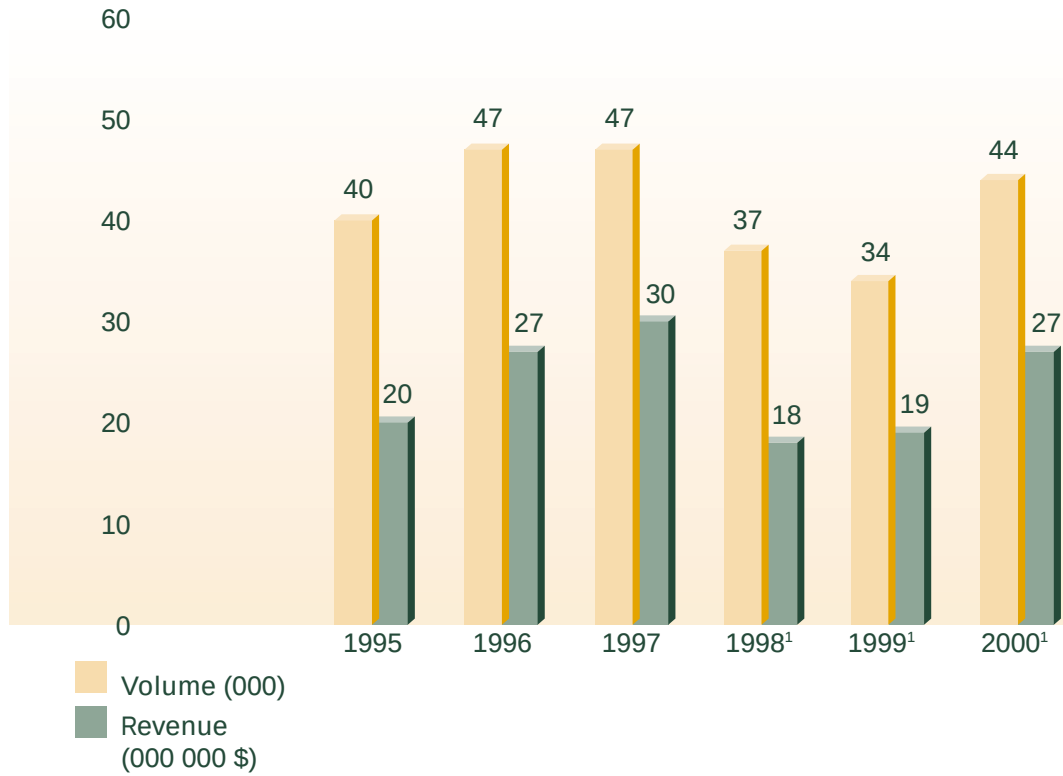
- Continue efforts with tour operators to benefit from the new direct flights between Frankfurt and Montréal.
- Educate travel agents regarding this destination.
- Organize a sales mission to Stuttgart, Hanover and Cologne in September 2001.
- Participate in roving seminars of the Canadian Tourism Commission in Zurich, Munich, Frankfurt, Düsseldorf, Hamburg and Berlin.
- Undertake a joint advertising campaign with wholesalers at sales locations.
- Support wholesalers who invest in the promotion of new products.
- Organize familiarization tours for wholesalers.

Web Site

- The German population is increasingly turning to the Internet as a source of information. Destination Québec will develop a Web site in German in 2001-2002.

3.3.4 Italy

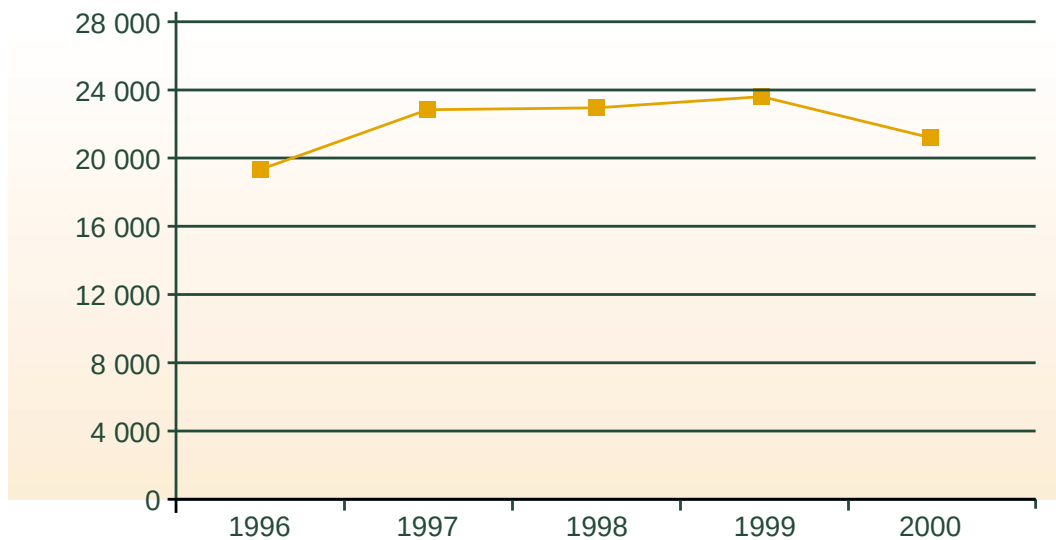
Market evolution



Source: Statistics Canada, *International Travel Survey (ITS)*

1 = Data adjusted by Tourisme Québec on the basis of border crossings.

Italian tourists entering Canada via Québec



Statistics Canada border crossing statistics only cover international tourists arriving directly in Québec. The population targeted by the survey is partial; however, the estimates are of excellent quality.

A Stable Market

- The number of Italian tourists visiting Québec varied little between 1993 and 1998. In 2000 the number of Italian tourists entering Canada increased significantly (+29.4%).
- Italians are travelling to Québec in increasing numbers for leisure purposes.
- In 1999 Québec's share of the market in Canada (volume of tourists) was 22.4%.

Strengths to Consolidate and Opportunities to Explore

- Italians are well versed in their knowledge of Canadian destinations. The presence of a large Italian community in Québec City, and particularly in Montréal, is an asset for the destination. The reputations of both Montréal and Québec are becoming firmly entrenched as a result of the presence of these two cities on the market. The same situation is being observed in coastal Québec, which is beginning to reap the rewards of its promotional efforts.
- Leading Italian wholesalers affirm that Québec now accounts for 50% to 60% of their sales to Canada. This is a complete reversal of the situation in 1992. A review of the wholesalers' catalogues reveals the emphasis placed on Québec in terms of the variety of programs offered and the duration of the stays.
- Since the onset of 2001 wholesalers have noticed an increase in the number of reservations made for travel to Québec.
- Interest in the winter season is growing, and new wholesalers are paying attention (Alpitours and Atikamek).
- In addition to winter, other completely new products are being sold, such as health centres and honeymoons.
- The demand for incentive travel is on the increase.
- For the first time, in 2001, Air Transat will offer a flight between Rome and Montréal.

Challenges

- Italians travel extensively within their own country.
- The cancellation by Air Canada of the twice-weekly Rome/Montréal flight is unfortunate. However, the impact should not be significant because the northern region of the country, which is the originator region, is used to travel via airports in Northern Europe.
- The economic situation should improve in 2001, but the GDP will remain much lower than that of other major European countries.

Strategies and Action Priorities

Positioning

Summer and winter are promoted with particular emphasis on tours, cities in the summer and winter sports. Incentive travel is growing in importance.

Target Markets

Central and Northern Italy

Target Clienteles

High-income consumers
Tour operators and travel agents
Incentive travel agencies

Marketing Strategies

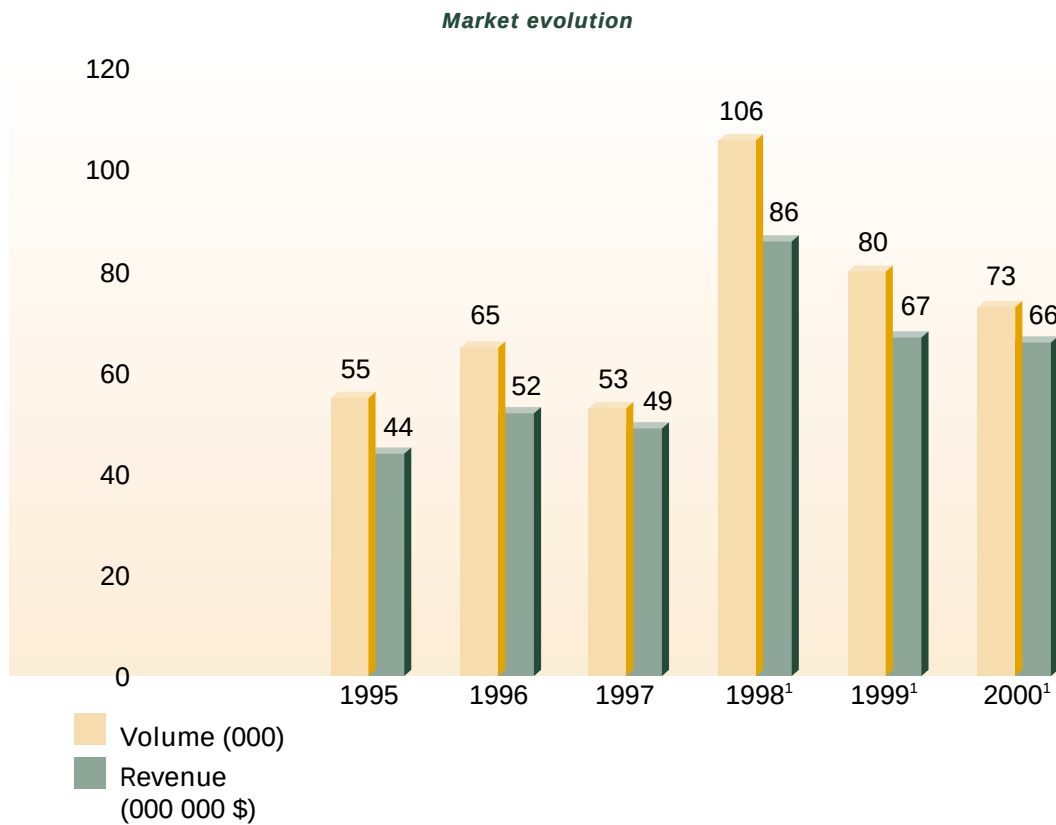
Advertising

For the first time this year, the cities of Montréal and Québec will host an advertising campaign with Italian wholesalers.

Press Relations

- The participation of Québec in the Bourse de voyage (BIT) in Milan will favour the organization of many individual and group press tours.

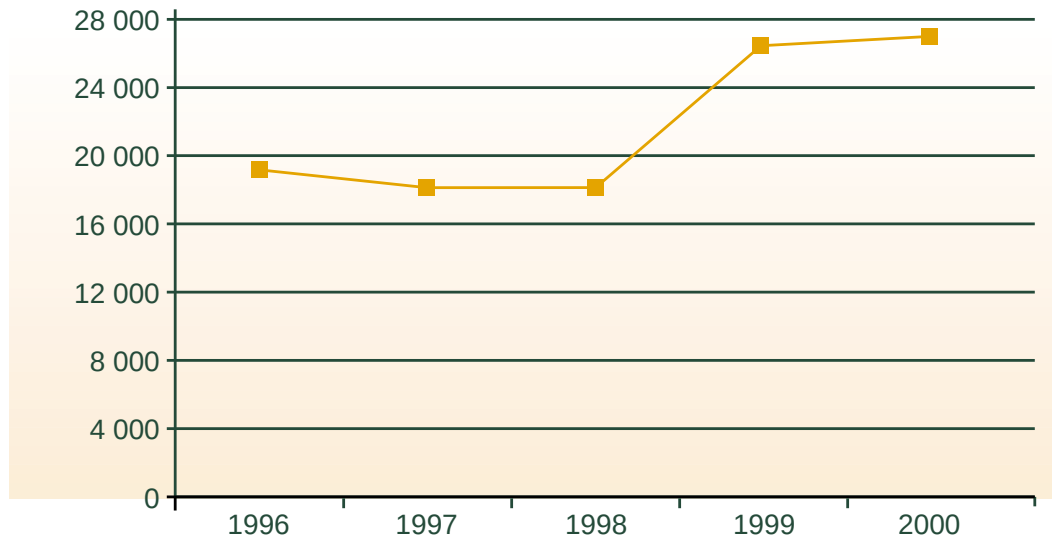
3.3.1 Japan



Source: Statistics Canada, *International Travel Survey* (ITS)

1 = Data adjusted by Tourisme Québec on the basis of border crossings.

Japanese tourists entering Canada via Québec



Statistics Canada border crossing statistics only cover international tourists arriving directly in Québec. The population targeted by the survey is partial; however, the estimates are of excellent quality.

A Lucrative Market to Develop

- Despite sustained government efforts, the slowdown in the Japanese economy is persisting and its revival remains fragile. Consumer confidence continues to waver as a result of unemployment and slight increases in revenue.
- Indicators show an important increase in Japanese tourists to Québec in the past two years. According to the *Japan Eastern Canada Tourism Association*, there has been a strong increase in Japanese clientele since 1997, owing to the growing popularity of fall scenery (colours). In the fall of 1999 the number of Japanese tourists entering Canada via Québec increased by 98% in comparison to the fall of 1998.
- Despite the grim economic picture of the past few years, Japan nonetheless remains the most lucrative tourist market of the Pacific Rim Countries with interesting opportunities for development. The Japanese like to travel overseas. More than 17 million of them elected trips abroad and numbers keep on growing.
- For 2001 the CRTI and Tourisme Québec foresee an increase of 3% in volume and 6% in tourist spending.
- The number of entries into Canada via Québec stabilized in 2000 in comparison to the previous year (+ 44%).

Strengths to Consolidate and Opportunities to Explore

- Québec has had a canvasser on the Japanese market since 1982.
- Japanese tourism in Western Canada is saturated to a point.

- Québec's distinct character, together with the French fact and the historical charm of its capital, are great assets. In addition, the Japanese place great importance on security issues; Québec enjoys a good reputation on that score.
- The Japanese tourists' increasing desire to get in touch with and learn about other cultures to broaden their horizons. This need is very strong. In spite of the difficult economic situation, the number of overseas trips began to grow again in 1999.
- Competing destinations have begun to scale back their promotional investments on the Japanese market. By maintaining the same level of investment, Québec increases its visibility and, accordingly, its profile as a destination.
- The market is changing: the "young women" segment is declining, while that of seniors and older couples is growing. The latter group is also cost-sensitive, but not particularly swayed by economic conditions.
- The Japanese market is maturing. In the future, more and more tourists will be travelling overseas for at least the second time. Longer stays in the same place and off-season trips will become more popular.
- High-speed trains now run in many regions of Japan, improving access to major airports and facilitating overseas travel for the residents of those regions. New geographic markets will emerge.
- The growth of the Kansai market (the region of Japan where major cities like Osaka, Kobe and Kyoto are located) will have a positive impact on Québec, which now has a canvasser in the region. This situation is seen in a very positive light in the region.

Challenges

- The lack of a direct flight to Montréal hampers efforts to market Québec as a destination.
- Japanese tourists are very demanding regarding certain services (cleanliness of premises, menus in Japanese, specific requirements in rooms, etc.).
- An increase in Japanese clientele in the fall is hampered by a lack of motor coaches and tour guides, as well as certain deficiencies concerning accommodation.
- Québec's tourism industry is not overly interested in developing this market.
- The Japanese are less and less dependent on a distribution network for information and reservations.
- Consumers always demand quality products, but at lower prices.
- Group travel remains prevalent. However, the increase in individual travel (FIT) is significant.
- Economic growth in Japan in 2001 will continue to be weak (+ 1.1%).

Strategies and Action Priorities

Positioning

City tourism and nature are promoted, with fall colours as the showcase product. At the same time, more emphasis will be placed on promoting the summer and fall seasons.

Target Markets

The Tokyo, Osaka, Nagoya, Fukuoka, Sapporo regions

Target Clienteles

High income, aged 54 +.

Theme

The Passion of Discovery

Marketing Strategies

Advertising

- Insert in the *Travel Journal for industry professionals*.
- Advertising campaign with PHP Institute inc. (on the Web, in magazines).

Press Relations

- Continue publication of a newsletter for the industry, jointly with Ontario.
- Organize group and individual press tours with Air Canada.
- Maintain activities in the Québec Media Club inaugurated in 2000.

Distribution

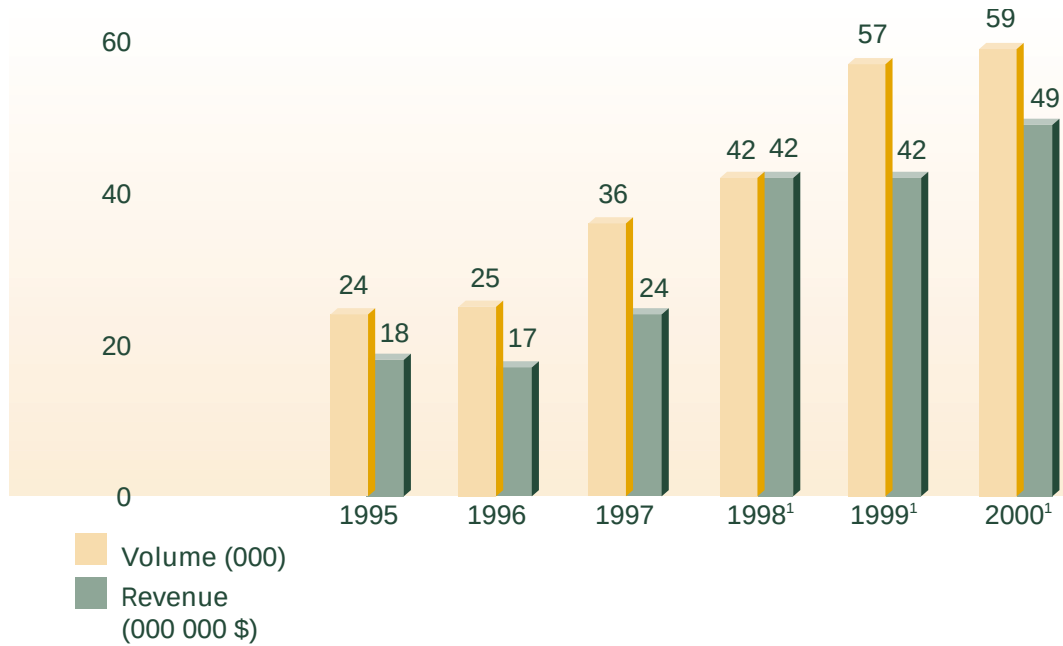
- Introduction of a joint program with RTAs to facilitate the presence of the industry at the Kanata travel marketplace.
- Organization of a canvassing mission will serve to expand knowledge of Québec's tourist products and regions.

3.4 EMERGING MARKETS

There is agreement among experts that growth in tourism in older industrialized countries will depend on the ability to capitalize on the expansion of these new markets. To secure the long-term growth of its tourism industry, Québec must start positioning itself on these markets now.

3.4.1 Latin America

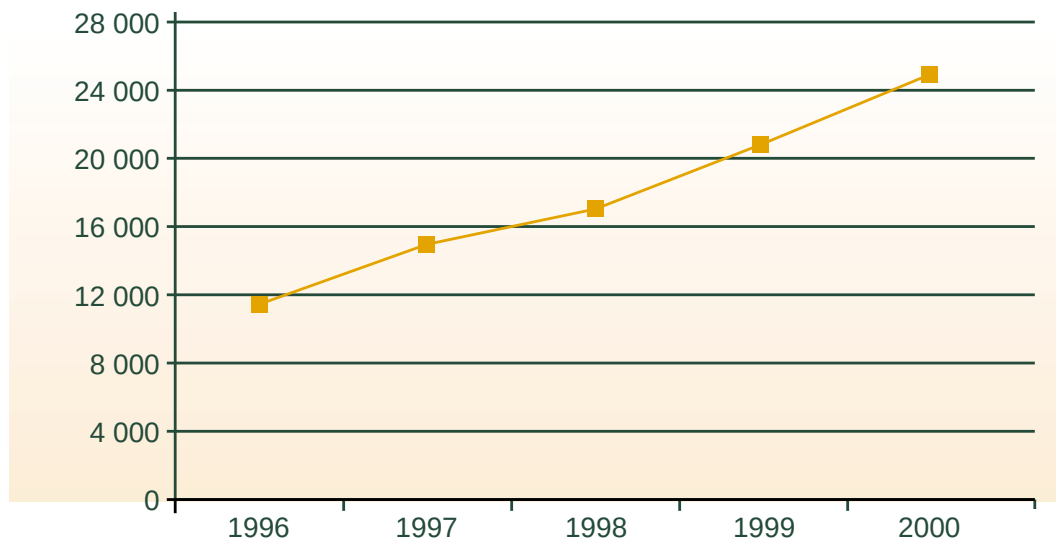
Evolution of the Mexican market



Source: Statistics Canada, *International Travel Survey* (ITS)

1 = Data adjusted by Tourisme Québec on the basis of border crossings.

Mexican tourists entering Canada via Québec



Statistics Canada border crossing statistics only cover international tourists arriving directly in Québec. The population targeted by the survey is partial; however, the estimates are of excellent quality.

In 2000 Québec's Latin American market (75,563 tourists entering Canada via Québec) was almost as large as the Asian market (85,491).

Mexico is Québec's targeted market in Latin America. This is the largest market, which in 2000 accounted for one third of all tourists from Latin America. However, when pertinent, some activity directed at less promising markets will be described.

Mexico and Brazil

- The number of Mexican tourists entering Canada via Québec is growing constantly. In 2000 the increase recorded reached 20%.
- Although three times less lucrative than Mexico, Brazil is a tourist market that experienced strong growth between 1994 and 1996. However, the number of Brazilian visitors entering Canada via Québec decreased significantly in 1999 as a result of the devaluation of Brazilian currency (real). The year 2000 marked a certain recovery as compared with 1998.

Strengths to Consolidate and Opportunities to Explore

- Canada, including Québec, is viewed as a safe exotic destination and enjoys a very positive image despite recent trade conflicts with Brazil.
- Airfares to North America are reasonable and the number of routes is growing.
- Mexican and Brazilian tourists travel extensively to the United States. Miami and New York are the preferred points of entry.
- These countries and Québec have Latin roots in common, leading to a marked interest in French culture.
- NAFTA has contributed to increased exchange with Mexico.
- Contrary to the situation in the United States, Mexicans do not require a visa to enter Canada.
- These markets have very good potential in the medium term: economic growth is strong in Mexico, consumer confidence is high, and travel abroad is growing. There is a large middle and upper class that is educated and economically secure.
- More and more wholesalers are offering programs for Canada and Québec, particularly Brazil. On the other hand, Mexican wholesalers present many programs devised exclusively for Québec.
- Consumers in these countries are looking for tourist experiences Québec can offer: urban stays (casinos, shopping, cultural events), resort stays, cultural tourism, skiing and soft adventure.

Challenges

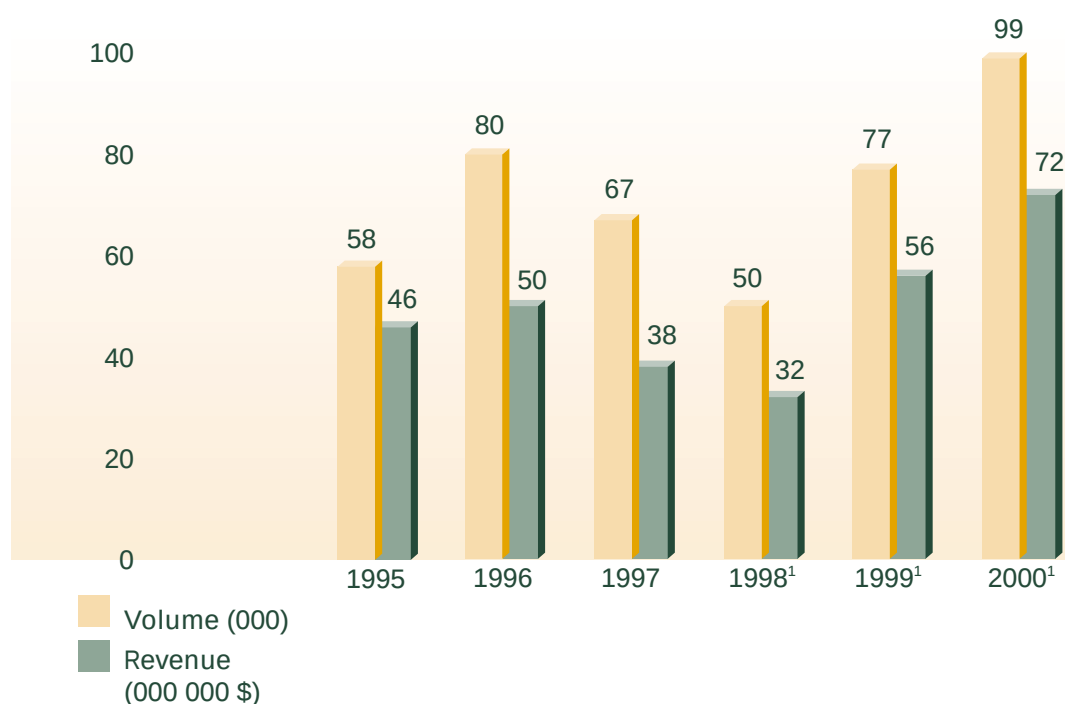
- To improve Québec's reputation, Québec needs to strengthen its presence. Promotional activities should be extended to include consumer trade shows and press relations.
- Canada and Québec are viewed as distant and cold destinations. Markets south of Mexico consider Canada and Québec to be distant lands.

Strategies and Action Priorities

- Participate in marketplaces and fairs in these markets.
- Organize missions and events specific to Québec.
- Enhance the awareness of distribution networks with respect to Québec tourist products with the potential of interesting customers in these markets.
- Increase production of promotional material in Spanish, including a brochure in religious tourism.
- Organize individual and group press tours for media from Mexico, Brazil and Argentina.
- Encourage tour operators to participate in events such as *Rendez-vous Canada* and the *Ontario-Québec Marketplace*.
- Intensify press relations activities.

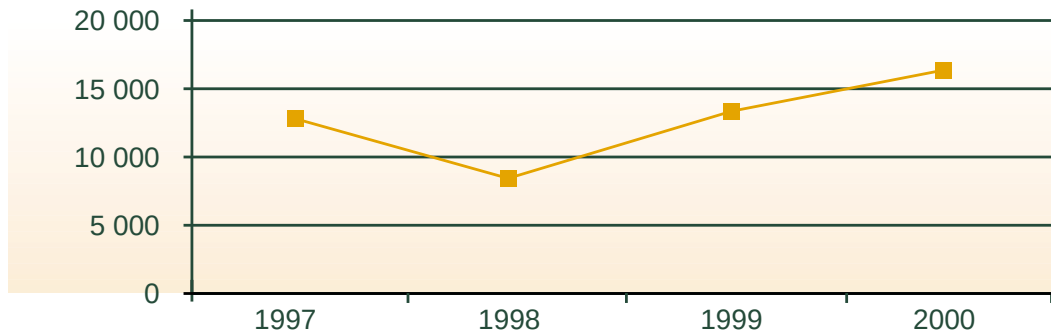
3.4.2 Pacific Rim Countries (excluding Japan)

Market evolution (China, South Korea, Taiwan and Hong Kong)



¹ Data adjusted by Tourisme Québec on the basis of border crossings.

South Korean, Chinese, Taiwanese and Hong Kong tourists entering Canada via Québec



Statistics Canada border crossing statistics only cover international tourists arriving directly in Québec. The population targeted by the survey is partial; however, the estimates are of excellent quality.

Like Japan, the number of tourists from Pacific Rim Countries who visited Québec has increased considerably since 1993. If the Asian economic crisis put a damper on this growth in 1998, the situation stabilized in 1999. The four leading markets emerging in Asia are South Korea, Taiwan, Hong Kong and China. These markets recorded growth rates of 53% in 1999 and 29.7% in 2000.

South Korea

- The economic recovery in South Korea has been stronger than anticipated. Therefore, it is not surprising to note that the number of Korean visitors entering Canada via Québec increased by 42% in 2000.

Strengths to Consolidate and Opportunities to Explore

- The Koreans are attracted by Québec's cultural differences.
- Koreans love winter sports and soft adventure packages.
- Interest in Eastern Canada (Ontario and Québec) is growing.
- Wholesalers are truly interested in promoting Canada and its tourist destinations.
- The *Québec Amérique* brochure is now published in Korean.
- Air Canada's daily flights now correspond more satisfactorily to the increased demand for seats from travel agents.

Challenges

- The distance between Québec and Korea (flying time) is a handicap.
- Consumers lack knowledge of Québec.
- The lack of distinguishing attractions and the language barrier are major constraints.
- Québec, like the rest of Canada, is considered to be an expensive tourist destination because it is more expensive to fly to Canada than to the United States and Australia.
- The tourist industry in Québec doesn't seem too interested in developing the market.

Taiwan

- The most recent economic indicators reveal that Taiwan has recovered from the Asian financial crisis and the aftermath of earthquakes.
- Taiwanese consumer confidence seems restored.
- Long distance travel is gaining in popularity. The number of Taiwanese visitors entering Canada via Québec grew by 40% in 2000 in comparison to 1999. Taiwan now outranks Hong Kong, holding second place among the Asian originator markets.

Strengths to Consolidate and Opportunities to Explore

- Taiwanese tour operators are showing increasing interest in Québec and its cultural differences. Recent familiarization tours with tour operators have resulted in increasingly popular fall/winter packages for Ontario and Québec.
- Tourisme Québec now has a promotional document in Mandarin, produced jointly with the Canadian Tourism Commission, Ontario and Air Canada.
- The increasing saturation of Western Canada as a destination is prompting the search for new destinations in Canada. Montréal, Québec and the Laurentians, with Mont Tremblant, hold great potential.
- Tourisme Québec maintains excellent relations with the tourist media in Taiwan.

Challenges

- Competition from neighbouring regions such as Hong Kong, Malaysia and Europe is very strong.
- Like the rest of Canada, Québec is perceived as a cold and expensive destination in winter.
- The cost of a visa for Canada is exorbitant.
- Flying time between Taiwan and Québec is 18 hours.
- Wholesalers find it difficult to sell individual packages because of the language factor. Taiwanese tourists fear they will be unable to communicate or be understood.
- Québec's tourism industry shows little interest in this clientele. The industry remains unfamiliar with Taiwanese culture and the requirements of Taiwanese tourists.
- The number of seats to Canada decreased in 2000.

Hong Kong

- The effects of the Asian financial crisis (1997-1998) were felt mainly in Hong Kong in 1999. The unfavourable economic context probably explains the slight decline in the number of tourists entering Canada via Québec in 1999 (-6.7%) and in 2000 (-4.5%).
- For travellers from Hong Kong, Canada is traditionally a destination for visits with family and friends.

Strengths to Consolidate and Opportunities to Explore

- The population is affluent and sophisticated, travelling abroad extensively.
- Québec's cultural difference is an asset.
- Wholesalers' interest in the Québec product is genuine.
- Since its integration with China in 1997, Hong Kong has become the gateway to an originator market with one of the highest growth potentials in the world.

Challenges

- The distribution network offers few packages in Québec; the West and Ontario are more visible.
- Consumers are unfamiliar with Québec.
- The lack of distinguishing attractions and the language barrier are major constraints.
- The tourist industry in Québec doesn't seem too interested in developing this market.

China

- The World Tourism Organization foresees that in 2010 China will lead the world in terms of becoming an originator market for tourists. Despite significant structural problems, economic growth forecasts for China are quite good, thanks to a gross national product of 7.3% in 1999, a growth forecast of 6.9% in 2000 and China's impending entry into the World Trade Organization.
- In 1999 the number of Chinese tourists visiting Canada increased by 12%. In 2000 the number of tourists entering Canada via Québec continued the growth observed in 1999 (8.9%). Some regions of China, such as Shanghai, Guangdong, Beijing, Shandong and Dalian are becoming increasingly prosperous and showing strong demand for travel abroad.

Strengths to Consolidate and Opportunities to Explore

- The proximity of the United States, a destination deemed prestigious by the Chinese, is an advantage for Canada and Québec.
- The importance of Chinese immigration to Canada engenders a certain level of familiarity with the destination, which is favourable to tourism.
- The presence of Air Canada in China is an asset for Québec.
- The emergence of a middle class is having direct repercussions on tourism.
- The planned obtaining by Canada this year of *Approved Destination Status* should contribute to the promotion and sale of package deals.

Challenges

- The procedure to obtain a visa to travel abroad is complicated.
- Like Canada, Québec is seen as a more costly destination than the United States.

- Canadian and Québec-based travel agencies find the specifics of the Chinese travel industry difficult to grasp.
- Canada and Québec are not well known.
- There are major restrictions placed on travel by the Chinese abroad.

Australia (and New Zealand)

- The continued growth of the Australian economy over the last decade is noteworthy.
- The year 2000 was exceptional. The number of Australian tourists entering Canada via Québec (11,824) bears witness to the significant growth observed, (17%) in comparison to the sluggish results posted for 1998 and 1999.
- Like Asian countries, New Zealand's economy was affected by the Asian crisis, but it has been on the upswing since 1999.
- However, the number of entries into Québec from New Zealand is rather insignificant (1,800 annually), but has remained stable for a number of years.

Strengths to Consolidate and Opportunities to Explore

- Australians and New Zealanders are attracted by the safety, the cleanliness and the warm, distinctive Québec culture.
- The positive perception of Canada as a destination is an asset for Québec.
- Many wholesalers in Québec offer Discover Holidays, Great Adventure Holidays, I-xplore, Explore Holidays, Tauck, Brewster, Venture Holidays, Adventure World, Scenic Tours, Brennan Tours, APT International Touring and Sunbeam Tours, Cosmos and Globus.

Challenges

- The proximity of Asian destinations, combined with the economic crisis experienced by the latter, is a major competitive disadvantage.
- Distance remains a handicap.

Strategies and Action Priorities for the Pacific Rim Countries

- Acquaint the distribution network with Québec through press relations, information seminars and familiarization tours.
- Encourage individual and group press tours in cooperation with the Canadian Tourism Commission.
- Encourage tour operators to program new packages for Québec.
- Participate in marketplaces and fairs and the various promotional activities organized in cooperation with the airlines.
- Continue business relations with Asian wholesalers.
- Update the database on Asian markets.

3.5 MULTI-MARKET PROMOTIONAL ACTIVITIES

3.5.1 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 distribution networks. The publishing program for 2001-2002 may be found in Appendix 2.

The year's action priorities:

- Introduction of a new publication on national parks;
- Introduction of a new publication on ecotourism;
- Introduction of a new publication on the family;
- Complete remake of the positioning video translated into seven languages;
- Production of a video clip on Québec for all markets;
- Continuous updating of the photo library. New photos will be purchased and photo trips organized to upgrade the library collection in response to new promotional needs (e.g. a new product such as golf);
- Image digitizing will be introduced to satisfy the growing demand for computer-based photos and to improve customer service;
- The production of a new CD-ROM of photos for different markets;
- Complete remake of the *Meeting in Québec* brochure, which promotes business tourism and incentive travel to Québec;
- Introduction of a new golf brochure;
- Introduction of a new snowmobile brochure;
- Introduction of a new ecotourism brochure;
- Addition of new tours departing from Montréal and Québec and updating existing tours;
- Improvement of the video library for advertising campaigns and for the production of promotional videos;
- Introduction of a new publication on new tourism zones;
- Publication of Destination Excellence, promoting recipients of Grands Prix du tourisme québécois awards;
- Reissuing of the Gardens brochure;
- Complete remake of the Québec Amérique brochure (by market: Europe, United States and South America);
- Remake of the winter product positioning brochure;
- Surveys on customer satisfaction in relation to our products and services.

3.5.2 Tourist Information

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

- Telephone information in North America and France;
- Traditional mail service and e-mail, including a Web site;
- Over-the-counter information in seven Infotouriste centres.

The action priorities for 2000-2001 are:

- To continue the development of the e-business centre (information, reservations);
- To maintain excellent quality service.

4 Opportunities for industry

Shows, Marketplaces and Fairs

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

The list of marketplaces and fairs planned for 2001-2002 may be found in the *Operations Plan* Section of this document.

Financial Support for Marketing

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

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

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

Financial Support for Regional Tourist Associations

Tourisme Québec provides financial assistance to regional tourist associations to enable them to fulfill their mission, which is primarily to promote their regional tourist products. An agreement was entered into in 1999 with the regional tourist associations, and will continue until 2002.

Sectoral Partnership

Tourisme Québec supports different kinds of sectoral partnerships (discussion groups, marketing committees, etc.) to implement integrated development plans aimed at promoting priority tourist products in Québec and abroad (events, outfitters, golfing, skiing, snowmobiling, camping, etc.).

Canvassing

Tourisme Québec has a team of canvassers who cover Québec's most important tourist 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 cities where Québec has canvassers, showing the markets they cover:

CITIES	TARGETED MARKETS
New York	Atlantic Centre
Chicago	Midwest
Dallas	South
Los Angeles	West
Paris	France Belgium
London	United Kingdom The Netherlands Scandinavia
Vlotho	Germany Austria Switzerland
Tokyo	Japan
Toronto	Canada (excluding the Maritimes) South Korea Taiwan Hong Kong
Montréal	Maritime Provinces New England Italy Spain Mexico and Brazil Australia and New Zealand

Technical Support

Tourisme Québec offers various technical services to companies. These services deal with:

- Marketing tourist products;
- Knowledge of products and markets.

Joint Promotional Campaigns

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

- *The Agrément campaign on the Québec market*

Partners can participate in television (shows and advertising) and radio campaigns.

- *The Agrément (Summer-Fall and Winter) campaign on the North American market*

Partners wishing to participate in Tourisme Québec's promotional efforts in all fields of communication are offered the chance to do so, for a slight financial consideration. Fees have been established with a view to allowing Québec partners to benefit from cost reductions.

Partners may participate in:

- Ads in magazines and newspapers (tie-in ads and inserts);
- The vacation package booklet (purchase of pages);
- Mailings (folder or booklet inserts, purchase of space in an insert that is part of a promotional mailing);
- The monthly fax, **Québec Travel Info**, distributed to travel agencies and automobile clubs (purchase of space at flat rates).

Press Relations

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

Tourist Information

In addition to providing personalized tourist information, Tourisme Québec offers businesses the possibility of advertising in the Infotouriste centres.

Visibility may be purchased in different ways:

- By placing leaflets in display stands;
- Presentation of short activities;
- Rental of display cases (limited space);
- Wall space for posters (Infotouriste centres of Montréal and Québec).

Video Library

Tourisme Québec maintains an image bank of Québec. For a small fee, companies may rent images.

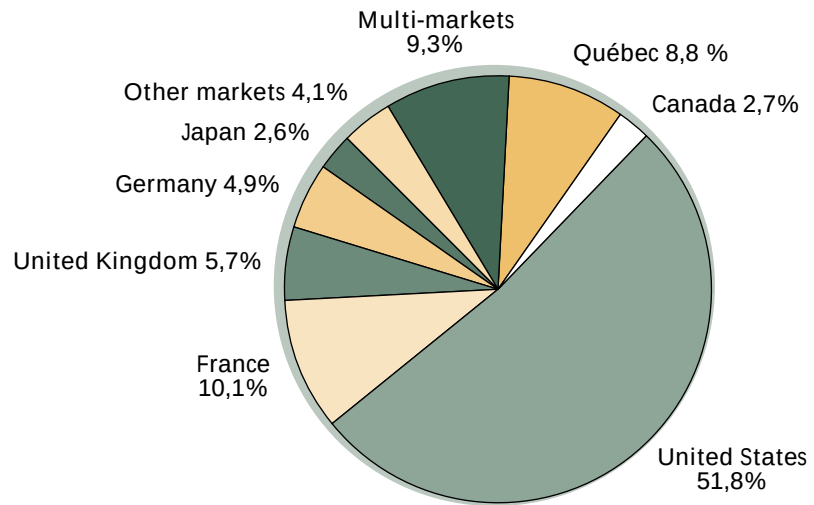
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Budget per Market

(\$000, rounded off)

PRODUCTS AND SERVICES	Québec	Canada	United States	Europe				Pacific Rim			Latin America	Multi markets	TOTAL
				France	United Kingdom	Germany	Other markets	Japan	Australia New- Zealand	Other markets			
Positioning and marketing in Québec													
Advertising and promotion	2 912	783	17 052	2 439	1 068	744	298	390	15	20	581	680	26 983
Press relations	250	96	420	290	150	441	50	115	15	70	115	–	2 012
Marketing	135	146	1 171	263	232	269	120	131	30	38	167	–	2 701
Canvassing	–	–	720	777	663	386	–	342	–	–	–	2 806	5 694
Sub total	3 297	1 025	19 363	3 769	2 113	1 840	468	978	60	128	863	3 486	37 390
Financial assistance to industry													
RTA	–	–	–	–	–	–	–	–	–	–	–	7 700	7 700
ATR du Grand- Nord (RTA)	–	–	–	–	–	–	–	–	–	–	–	600	600
Regional tourism (Accommodation tax)	–	–	–	–	–	–	–	–	–	–	–	8 600	8 600
PSDOT: Financial assistance program for tourism events	–	–	–	–	–	–	–	–	–	–	–	2 000	2 000
Partners of Québec (PPC)	–	–	–	–	–	–	–	–	–	–	–	850	850
Partners abroad (PPC)	–	45	271	285	177	140	95	20	15	160	75	–	1 282
Sub total	0	45	271	285	177	140	95	20	15	160	75	19 750	21 032
TOTAL	3 297	1 070	19 634	4 054	2 290	1 980	563	998	75	288	938	23 236	58 422

Québec's positioning and marketing budget: breakdown per market (\$37 M)



2001-2002 Operations Plan

MONTREAL

Category	City	Product	Date	Budget ('000)
OTHER EXPENSES				
Canvassing				
International representation		No particular product		4 495,0
Sub total	Canvassing			4 495,0
Operations - Other Expenses				
Travel expenses - Québec		No particular product	02-03-31	60,0
Operations Montréal		No particular product	02-03-31	133,0
Mail and messenger service		No particular product	02-03-31	375,0
Telemarketing		No particular product	02-03-31	200,0
Support - Montréal		No particular product	02-03-31	80,8
Sub total	Operations Other Expenses			848,8
Total	Other Expenses			5 343,8
ACTIVITIES				
Marketplaces				
Miscellaneous	Miscellaneous	No particular product	02-03-31	21,0
Sub total	Marketplaces			21,0
Consumer Promotions				
Miscellaneous		No particular product	02-03-31	150,0
Sub total	Consumer Promotions			150,0
Receptions				
Miscellaneous receptions				53,5
Sub total	Receptions			53,5
Press Relations				
Media tours		No particular product		150,0
Sub total	Press Relations			150,0
Seminars				
Miscellaneous seminars		No particular product		10,0
Sub total	Seminars			10,0
Familiarization Tours				
Miscellaneous tours	Miscellaneous	No particular product	02-03-31	50,0
Sub total	Familiarization Tours			50,0
Travel Expenses - Activities				
Miscellaneous	Miscellaneous	No particular product	02-03-31	350,0
Sub total	Travel Expenses - Activities			350,0
Total	Activities			784,5

MONTREAL (cont.)

Category	City	Product	Date	Budget ('000)
COOP PROMOTION PROGRAM				
PPC – Community Partners				
	Miscellaneous to be determined	No particular product	02-03-31	850,0
<i>Sub total</i>	<i>PPC – Community Partners</i>			<i>850,0</i>
Total	Coop Promotion Program			850,0
Total	Montréal			6 978,3

2001-2002 OPERATIONS PLAN

QUÉBEC

Category	City	Product	Date	Budget ('000)
ADVERTISING				
Advertising - Québec				
Intra-Québec campaign		No particular product	02-03-31	2 500,0
<i>Sub total</i>	<i>Advertising - Québec</i>			<i>2 500,0</i>
Total	Advertising			2 500,0
ACTIVITIES				
Press Relations				
Miscellaneous	Québec	No particular product	02-03-31	100,0
<i>Sub total</i>	<i>Press Relations</i>			<i>100,0</i>
Total	Activities			100,0
Total	Québec			2 600,0

CANADA

Category	City	Product	Date	Budget ('000)
ADVERTISING				
Advertising - Americas - Summer				
Americas campaign		No particular product	02-03-31	385,0
<i>Sub total</i>	<i>Advertising - America - Summer</i>			385,0
Total	Advertising			385,0
Total	Canada			385,0

2001-2002 OPERATIONS PLAN

TORONTO

Category	City	Product	Date	Budget ('000)
ADVERTISING				
Advertising - Americas - Summer				
Advertising ad hoc		No particular product	01-04-01	50,0
Sub total	Advertising - Americas - Summer			50,0
Total	Advertising			50,0
ACTIVITIES				
Marketplaces				
ACTA	Montréal	No particular product	01-10-01	2,5
Acta Halifax	Halifax, NS	No particular product	01-09-01	1,0
Canadian Meeting & Incentive Travel Symposium & Trade Show CSAE / SCDA	Toronto, ON	Business, conventions, incentive	01-08-21	3,0
Executive Travel & Corporate Meeting	Calgary, AB	Business, conventions, incentive	01-07-28	2,0
Planners Trade Show	Calgary, AB and Vancouver, BC	Business, conventions, incentive	01-10-01	2,0
Motivation Show / Incentive Trade Show	Chicago, IL	Business, conventions, incentive	01-10-01	1,0
OMCA	Toronto, ON	Tours	01-11-05	1,5
Product introduction	Toronto, ON	Multi-product	01-04-01	5,0
Québec Cup	Toronto, ON	No particular product	01-06-04	15,0
Tête-à-tête Trade Show	Ottawa - Hull	Business, conventions, incentive	02-02-01	0,5
Sub total	Marketplaces			33,5
Seminars				
IMPAC - Annual Conference & Marketplace	Montréal	Business, conventions, incentive	01-11-01	0,8
MPI - NEC	Toronto, ON	No particular product	01-04-20	0,6
MPI - PEC	Hawaii	Business, conventions, incentive	02-01-01	1,3
MPI - WEC	Las Vegas, NV	Business, conventions, incentive	01-07-22	1,5
MPI Awards	Toronto, ON	Business, conventions, incentive	02-03-01	4,5
SITE	Toronto, ON	Business, conventions, incentive	01-08-01	1,0
SITE - University of the Americas	Costa Rica	No particular product	01-06-23	1,0
Sub total	Seminars			10,7
Consumer Shows				
Addison Shows	Victoria - Langley, BC -	No particular product	02-02-05	3,0
Forever Young Show	Hamilton, ON	No particular product	01-05-04	2,0
Ottawa Golf & Travel Show	Ottawa, ON	Golf	02-03-15	3,0
Outdoor Show	Toronto, ON	No particular product	02-02-01	4,0
Spring Fishing Show	Toronto, ON	Hunting and fishing	02-02-01	4,0
Supertrax International Snowmobiler's Show	Toronto, ON	Snowmobiling	01-10-19	5,0
The Travel & Leisure Show 2001	Toronto, ON	Multi-product	01-04-22	5,0
The Travel & Vacation Show	Ottawa, ON	No particular product	01-04-27	2,0
Toronto golf and Travel show	Toronto, ON	Golf	02-02-28	4,0
Toronto Ski Show	Toronto, ON	Skiing	01-10-11	5,0
Sub total	Consumer Shows			37,0
Receptions				
Discover Québec	Vancouver, BC	Multi-product	01-12-01	20,0
First Annual Québec Cup Golf Tournament	Toronto, ON	Business, conventions, incentive	01-06-04	5,0
Monthly Luncheons - PATA / ANTOR / SATW / MPI / SITE / CSAE	Toronto, ON	Multi-product		2,0
MPI - Annual Americas Event	Toronto, ON	Business, conventions, incentive	01-06-26	3,0
Québec Day	Toronto, ON	Business, conventions, incentive	02-02-01	0,0
Québec Winter Wonderland	Toronto, ON	No particular product	01-10-01	20,0
Via Rail and Casino promotion	Toronto, ON	Business, conventions, incentive	01-06-23	5,0
Sub total	Receptions			55,0

TORONTO (cont.)

Category	City	Product	Date	Budget ('000)
Familiarization Tours				
Hillcrest Tours familiarization tour	Richmond Hill, ON	No particular product	01-05-30	0,7
Familiarization tours	Canada	Tours	01-04-01	4,3
Familiarization tours	Toronto, ON	Business, conventions, incentive	01-04-01	5,0
Meeting Professionals				
Sub total	Familiarization Tours			10,0
Press relations				
Miscellaneous		No particular product	02-03-31	96,0
Sub total	Press Relations			96,0
Total	Activities			242,2
COOP PROMOTION PROGRAM				
PPC – Partners Abroad				
Receptive and travel organizers		Skiing	01-04-01	25,0
Receptive and travel organizers		No particular product	01-04-01	20,0
Sub total	PPC – Partners Abroad			45,0
Total	Coop Promotion Program			45,0
Total	Toronto			337,2

2001-2002 OPERATIONS PLAN

UNITED STATES

Category	City	Product	Date	Budget ('000)
ADVERTISING				
Advertising - Americas - Summer				
Miscellaneous	No particular city	No particular product	02-03-31	6 710,0
Sub total	Advertising - Americas - Summer			6 710,0
Advertising - Americas - Winter				
Miscellaneous	No particular city	No particular product	02-03-31	8 300,0
Sub total	Advertising - Americas - Winter			8 300,0
Marketing par le Web				
Miscellaneous	No particular city	No particular product	02-03-31	1 500,0
Sub total	Marketing via the Web			1 500,0
Total	Advertising			16 510,0
ACTIVITIES				
Marketplaces				
ABA / Annual convention and Travel Exchange	Kissimmee, St-Cloud, FL	No particular product	02-01-01	1,4
Bank Travel Conference	Biloxi, MS	No particular product	02-02-22	1,5
Bienvenue Québec / sales persons' breakfast	Québec	No particular product	01-10-01	0,0
Heritage Clubs / Peer Group Conference	Indianapolis, IN	No particular product	02-02-01	7,3
Non-profit in Travel Conference	Washington, DC	No particular product	02-02-01	1,6
NTA / Annual Convention and Travel Exchange	Houston, TX	No particular product	01-11-01	3,1
Sizzling Cities	6 cities in the United States	No particular product	01-11-01	0,0
Team Canada (NTA/ABA)	Houston, TX and Kissimmee, St-Cloud, FL	Multi-product	01-11-09	8,4
USTOA	Miami Beach, FL	No particular product	01-12-01	0,8
Sub total	Marketplaces			24,1
Seminars				
Canada Specialists Program / USA - CCT		No particular product		15,0
Gogo Worldwide Seminars	NY and 3 cities in NJ	No particular product	02-01-01	0,0
Learning Travel - Mission Midwest	Chicago, Milwaukee, IL	No particular product	01-06-01	1,0
Québec Specialists convention	Québec	No particular product	01-05-18	4,5
Québec Specialists Fall Seminar	Montréal	No particular product	01-10-19	1,5
Québec Specialists Program		No particular product		22,5
Sub total	Seminars			44,5
Consumer Shows				
Hunting and fishing show	16 cities in the United States	Hunting and fishing	01-09-08	51,0
Sub total	Consumer Shows			51,0
Consumer Shows				
Gay Friendly Québec		No particular product		42,5
Sub total	Consumer Shows			42,5
Receptions				
Bank Travel Conf. / TQbc & Collette's luncheon	Biloxi, MS	No particular product		10,0
Non profit in travel conf. / Canadian Promotion	Washington, DC	No particular product	02-02-01	1,5
Team Canada Annual Meeting	Pointe-au-Pic, (Québec)	Tours	01-04-02	0,9
USTOA – Sponsorship	Miami Beach, FL	No particular product	01-12-01	15,0
Virtuoso University	Montréal and Québec	No particular product	01-05-01	10,0
Sub total	Receptions			37,4

UNITED STATES (cont.)

Category	City	Product	Date	Budget ('000)
Familiarization Tours				
	Familiarization tours	Multi-market	No particular product	2,0
<i>Sub total</i>	<i>Familiarization Tours</i>			2,0
Press Relations				
	Miscellaneous			150,0
<i>Sub total</i>	<i>Press Relations</i>			150,0
Total	Activities			351,5
COOP PROMOTION PROGRAM				
PPC – Partners Abroad				
	Miscellaneous	No particular product	01-04-01	263,3
<i>Sub total</i>	<i>PPC – Partners Abroad</i>			263,3
Total	Coop Promotion Program			263,3
Total	United States			17 124,8

2001-2002 OPERATIONS PLAN

CHICAGO

Category		City	Product	Date	Budget ('000)
ACTIVITIES					
Marketplaces					
	AA Vacation Product Launch	Chicago, IL	Tours	01-04-09	1,1
	AFC - Holiday Showcase	Chicago, IL	Business, conventions, incentive	01-12-01	3,1
	ASTA Travel Expo	Milwaukee, WI	Tours	01-11-11	0,9
	Canada Showcase	Chicago, IL	Business, conventions, incentive	02-03-01	3,1
	Canada Showcase	Detroit, MI	Business, conventions, incentive	02-03-01	3,1
	Cleveland Plain Dealer	Cleveland, OH	Tours	02-03-01	1,2
	Detroit Newspaper Show	Detroit, MI	Tours	01-10-02	1,2
	Group Travel Expo	Minneapolis, MN	Tours	01-09-10	1,1
	IT & ME Show	Chicago, IL	Business, conventions, incentive	01-10-09	30,6
	MPI - PEC	Honolulu, HI	Business, conventions, incentive	02-01-21	1,1
	MPI - WEC	Las Vegas, NE	Business, conventions, incentive	01-07-21	1,1
	National Trade Shows	Colorado Springs, CO	Tours	02-03-01	1,2
	National Trade Shows	Ft. Collins, CO	Tours	02-03-01	1,2
	National Trade Shows	Denver, CO	Tours	02-03-01	1,2
	Sizzling Cities	Chicago, IL	Tours	01-12-01	1,5
	Spotlight Canada 2002	Detroit, MI	Tours	02-03-01	0,9
	Spotlight Canada 2002	Cleveland, OH	Tours	02-03-01	0,9
Sub total	Marketplaces				54,5
Seminars					
	Miscellaneous seminars	Territory	Multi-product		30,0
Sub total	Seminars				30,0
Consumer Shows					
	AAA Vacation Expo	Cleveland, OH	Tours	01-10-01	3,1
	Chicago Ski Show & Snowboard Show	Chicago, IL	Skiing	01-11-01	7,7
	Cleveland Ski Show	Cleveland, OH	Skiing	01-10-01	7,7
	Detroit Ski Show	Cleveland, OH	Skiing	01-10-01	7,7
	Int'l Adventure Show	Rosemont, IL	Adventure	02-02-01	13,8
	L & GIT Travel Show	Chicago, IL	Multi-product	01-10-01	0,9
	Ski Group 2001	Detroit, MI	Skiing	01-05-02	1,1
	Ski Group 2001	Chicago, IL	Skiing	01-05-03	1,1
	Ski Group 2001	Minneapolis, MN	Skiing	01-05-01	1,2
	The Plain Dealer Ski and Winter Sports Show	Cleveland, OH	Skiing	01-11-16	2,0
	Trip Seminar 2001, 29th Anniversary	Chicago, IL	Skiing	01-05-19	1,0
Sub total	Consumer Shows				47,3
Consumer Promotions					
	Non profit organizations	Territory	Urban stay		7,7
	Promotions with partners	Territory	No particular product		15,3
	Special events	Territory	No particular product		25,0
Sub total	Consumer Promotions				48,0
Receptions					
	Cirque du Soleil / Québec Day	Chicago, IL	Tours	01-07-12	30,6
	Cirque du Soleil / Québec Day	Chicago, IL	Business, conventions, incentive	01-06-27	30,6
Sub total	Receptions				61,2
Familiarization Tours					
	Various tours	Territory	Tours		7,7
	Various tours	Territory	Business, conventions, incentive		7,7
Sub total	Familiarization Tours				15,4

CHICAGO (cont.)

Category		City	Product	Date	Budget ('000)
Press Relations	Miscellaneous	Chicago, IL	No particular product	02-03-31	50,0
<i>Sub total</i>	<i>Press Relations</i>				<i>50,0</i>
Total	Activities				306,4
Total	Chicago				306,4

2001-2002 OPERATIONS PLAN

DALLAS

Category	City	Product	Date	Budget ('000)
ACTIVITIES				
Marketplaces				
AA Vacations Product Launch	Dallas and Austin, TX	No particular product	01-04-11	1,8
ASTA Cruise Fest	Miami, FL	No particular product	02-03-01	1,5
ASTA Great Americas	Miami, FL	No particular product	02-02-01	0,9
Florida Road Show	Orlando and Sarasota, FL	No particular product	02-03-01	2,3
Florida Road Show	Miami, Boca, Tampa, FL	No particular product	01-11-01	2,3
Florida Road Show	Miami, Orlando, Tampa and Sarasota, FL	No particular product	01-04-05	1,2
Hispanic Meeting Planners	Orlando, FL	Business, conventions, incentive	01-06-27	0,8
IT & ME	Chicago, IL	Business, conventions, incentive	01-09-23	0,9
Limra Convention	Orlando, FL	No particular product	01-10-01	1,3
Meeting Quest	Atlanta, GA	Business, conventions, incentive	01-09-28	3,1
Meeting Quest	Dallas, TX	Business, conventions, incentive	01-11-09	3,1
MPI PEC	Hawaii	Business, conventions, incentive	02-01-01	0,9
MPI WEC	Las Vegas, NV	Business, conventions, incentive	01-07-21	0,9
National Trade Shows	Houston, Dallas, San Antonio and Austin, TX	No particular product	01-04-26	4,0
NTE	New Orleans, LA, Atlanta, GA Alabama and Tennessee	No particular product	01-09-27	4,8
Showcase Canada	Dallas, TX	Business, conventions, incentive	01-09-24	1,3
Showcase Canada	Atlanta, GA	Business, conventions, incentive	01-05-01	1,0
Site Conference	Costa Rica	Business, conventions, incentive	01-06-22	1,0
Sizzling Cities		No particular product	01-11-01	0,9
Texas Ski Council	San Antonio, TX	No particular product	01-04-06	1,1
Travel Agents of Tennessee	Nashcity, TN	Tours	01-07-27	0,5
Trips Unlimited	New Orleans, LA	No particular product	02-01-01	1,5
Uniglobe	Boca Raton, FL	No particular product	01-06-22	1,5
Sub total	Marketplaces			38,6
Seminars				
American Express	Houston, TX	No particular product	02-01-01	1,5
AMMC Meeting	Montréal	Business, conventions, incentive	01-08-23	0,8
Brewster Seminars	Louisiana, Carolinas, Arkansas and Alabama	No particular product	01-09-01	4,6
CTC	Atlanta, GA	Business, conventions, incentive	01-11-01	0,8
Fairmont Hotels	Houston, TX	Business, conventions, incentive	01-11-01	0,8
Gogo Tours	Houston, TX	No particular product	01-06-01	1,3
Gogo Tours	Florida	No particular product	01-08-01	1,3
MPI	Dallas, TX	Business, conventions, incentive	01-07-01	1,2
Sub total	Seminars			12,3
Consumer Shows				
Adventure Travel	Atlanta, GA	Adventure	02-02-01	1,4
Adventure Travel	Dallas, TX	Adventure	02-02-27	1,4
International Sport Show	Carolinas	No particular product	02-03-01	1,5
Prime Time Expo	Atlanta, GA	No particular product	01-12-01	1,4
Snowbird Extravaganza	Tampa, FL	No particular product	02-01-01	2,1
Miscellaneous	Miscellaneous	No particular product	02-03-31	3,9
Sub total	Consumer Shows			11,7
Consumer Promotions				
2002 International Ballet		No particular product		3,1
Non profit organizations		No particular product		7,3
Québec Trade Office		No particular product		18,4
Rennert World Travel		No particular product		5,7
Miscellaneous		No particular product		7,3
Sub total	Consumer Promotions			41,8

DALLAS (cont.)

Category		City	Product	Date	Budget ('000)
Receptions					
	Braves – Expo ball game	Atlanta, GA	Business, conventions, incentive	01-09-01	3,8
	Canada Day	Atlanta, GA	Business, conventions, incentive	01-07-01	2,3
	Fairmont Hotels, CCT	Dallas, TX	Business, conventions, incentive	02-03-01	4,6
	Golf tournament	Dallas, TX	Business, conventions, incentive	01-09-01	1,8
	Hockey game	Atlanta, GA	Business, conventions, incentive	02-02-01	4,6
	Hockey game	Nashcity, TN	Business, conventions, incentive	02-03-01	4,6
	Conference and luncheon - International Association of Hispanic Meeting Professionals (IAHMP)	Orlando, FL	No particular product	01-06-28	4,6
	Québec Day	Dallas, TX	Business, conventions, incentive	01-11-01	17,4
	Québec Day	Houston, TX	Business, conventions, incentive	01-10-01	17,4
	Québec Day	Austin, TX	Business, conventions, incentive	02-01-01	1,2
Sub total	Receptions				62,3
Familiarization Tours					
	Air Canada	Tremblant / Montréal	No particular product	02-02-01	3,8
	Canadian Airlines	Tremblant / Montréal	No particular product	02-03-01	3,8
	CP Hotels, CCT	Montréal	Business, conventions, incentive	01-11-01	3,0
	CP Hotels, CCT	Québec	Business, conventions, incentive	01-10-01	3,0
	CCT - Atlanta	Québec	Business, conventions, incentive	02-02-01	3,0
	CCT - Dallas	Montréal, Québec	No particular product	01-08-01	2,2
	CCT - Florida	Montréal / Québec	No particular product	01-09-01	2,2
	Commercial visits	Montréal / Québec	Business, conventions, incentive	01-07-01	9,2
	Miscellaneous	Québec region	No particular product	01-09-01	3,1
Sub total	Familiarization Tours				33,3
Press Relations					
	Miscellaneous	Miscellaneous	No particular product	01-03-31	50,0
Sub total	Press Relations				50,0
Total	Activities				250,0
Total	Dallas				250,0

2001-2002 OPERATIONS PLAN

LOS ANGELES

Category		City	Product	Date	Budget ('000)
ACTIVITIES					
Marketplaces					
	ASTA Retail Shows	Multi-product	01-04-01	3,1	
	ASTA's 71st World Travel Congress	Sécity, Spain	Multi-product	01-11-06	0,0
	DMO Trade Mission	CA and WA	Multi-product	01-05-07	32,2
	Helmes Briscoe Promotion	Orlando, FL	Business, conventions, incentive	01-12-05	30,6
	MPI - PEC	Hawaii	Business, conventions, incentive	02-01-21	1,5
	MPI - WEC	Las Vegas, NV	Business, conventions, incentive	01-07-22	7,3
	MPI Golf Classic Phoenix	Phoenix, NV	Business, conventions, incentive	01-07-01	1,5
	NCC - MPI	San Francisco, CA	Business, conventions, incentive	02-02-12	1,5
	Showcase Canada	San Francisco	Business, conventions, incentive	02-03-08	3,1
	SITE - University	San Jose, Costa Rica	Business, conventions, incentive	01-06-23	1,5
	SITE Arizona Special Event Sponsor	Phoenix, AZ	Business, conventions, incentive	01-08-01	3,1
	Sizzling Cities	Los Angeles and San Francisco, CA	Multi-product	01-11-24	1,5
	Sizzling Cities - Men On Vacation TO for Québec	USA Roadshow	Multi-product	01-11-01	1,5
	Trailblazers	Montréal	Business, conventions, incentive	01-07-27	32,1
Sub total	Marketplaces				120,5
Seminars					
	Las Vegas - Air Canada	Las Vegas, NV	Multi-product	01-04-01	1,5
	Phoenix - Air Canada	Phoenix, AZ	Multi-product	01-04-01	1,5
	San Francisco - Air Canada	San Francisco, CA	Multi-product	01-04-01	1,5
	Seattle Air Canada	Seattle, WA	Multi-product	01-04-01	1,5
	Showcase Canada Seattle	Seattle, WA	Business, conventions, incentive	01-06-07	1,5
	Travelscope - Air Canada CA	California	Multi-product	01-04-01	2,3
	Travelscope Seminar	Los Angeles, CA	Multi-product	01-07-15	2,3
	Travelscope Seminar	San Francisco, CA	Multi-product	01-02-28	3,1
Sub total	Seminars				15,2
Consumer Shows					
	LA Times Travel Show	Long Beach, CA	Multi-product	02-03-26	6,9
	Orange County Register Show	Orange County, CA	Multi-product	01-02-02	4,6
	Vacationfest 2002	Santa Monica, CA	Multi-product	02-02-17	1,8
Sub total	Consumer Shows				13,3
Receptions					
	NCC - MPI Annual	San Francisco, CA	Business, conventions, incentive	01-04-08	2,3
	SITE Southern California Holiday	San Diego, CA	Business, conventions, incentive	01-12-14	5,4
	Swing Thru Canada	Los Angeles, CA	Business, conventions, incentive	01-06-03	4,6
Sub total	Receptions				12,3
Familiarization Tours					
	Brennan Tours	Montréal and Québec	Multi-product	02-03-01	1,5
	Brennan tours (product tour)	Montréal and Québec	Tours	01-10-01	1,5
	Golden Gate Tours	Montréal, Lac-Saint-Jean and Québec	Tours	01-04-19	6,1
	Incentive and familiarization tour / Fairmont	Tremblant / Richelieu	No particular product	01-04-01	4,6
	Product day	Québec	Tours	01-05-27	6,1
	Commercial visits	Québec	Business, conventions, incentive	01-04-01	7,7
Sub total	Familiarization Tours				27,5
Press Relations					
	Miscellaneous	Los Angeles Media	Business, conventions, incentive	02-03-31	60,0
Sub total	Press Relations				60,0
Total	Activities				248,8
Total	Los Angeles				248,8

NEW YORK – BUSINESS, CONVENTIONS, INCENTIVE

Category	City	Product	Date	Budget ('000)
ACTIVITIES				
Marketplaces				
ASAE 2001	Philadelphia, PA	Business, conventions, incentive	01-08-04	20,0
Beyond Borders	New York, NY	No particular product	01-04-01	1,5
MPI - Education day	New York, NY	No particular product	01-09-01	1,5
MPI - PEC	New Orleans, LA	No particular product	02-01-20	1,5
MPI - WEC	Los Angeles, CA	No particular product	01-07-01	1,5
Showcase Canada 2002	Washington, DC	No particular product	01-06-25	3,0
Miscellaneous	New York, NY	No particular product	02-03-31	11,0
Sub total	Marketplaces			40,0
Seminars				
Miscellaneous seminars	to be determined	No particular product	02-03-31	7,8
New Jersey Sales Seminar	to be determined	No particular product	01-04-01	0,3
New York Sales Seminar	New York, NY	No particular product	01-04-01	0,7
Pennsylvania Sales Seminar	Philadelphia, PA	No particular product	01-05-25	0,3
Upstate New York Sales Seminar	to be determined	No particular product	01-04-01	0,3
Virginia Sales Seminar	Virginia	No particular product	01-07-26	0,3
Westchester Sales Seminar	to be determined	No particular product	01-04-01	0,3
Sub total	Seminars			10,0
Consumer Promotions				
Miscellaneous		No particular product	01-04-01	20,0
Sub total	Consumer Promotions			20,0
Receptions				
Chef's Challenge	Philadelphia, PA	No particular product	01-10-17	12,0
Mini Québec Day / Hartford	Hartford, CT	No particular product	01-06-02	5,0
Mini-Québec Day	Princeton, NJ	No particular product	01-06-01	5,0
Mini-Québec Day / Virginia	Virginia	No particular product	01-08-22	5,0
Montréal Symphony and Russian T Room	New York, NY	No particular product	01-10-21	12,0
MPI Chapter events	NY, NJ, DC, CT	No particular product	01-04-01	12,0
MPI Sponsorship	New York, NY	No particular product	01-04-01	12,0
Opening Night NY Film Festival	New York, NY	No particular product	01-09-01	12,0
Québec Day / Cirque du Soleil / Virginia	Virginia	No particular product	01-08-22	40,0
Artists from Québec	Territory	No particular product	01-04-01	5,0
Sub total	Receptions			120,0
Familiarization Tours				
Miscellaneous tours		No particular product	02-03-31	38,0
Sub total	Familiarization Tours			38,0
Press Relations				
Miscellaneous tours	Miscellaneous	No particular product	02-03-31	60,0
Sub total	Press Relations			60,0
Total	Activities			288,0
Total	New York – Business, Conventions, Incentive			288,0

2001-2002 OPERATIONS PLAN

NEW-YORK (LEISURE)

Category	City	Product	Date	Budget ('000)
ACTIVITIES				
Marketplaces				
Educational Travel Alliance	Washington, DC	No particular product	02-03-01	4,0
Gramer	Miscellaneous, NY	No particular product	01-05-11	12,0
National Trade Shows	Miscellaneous	Multi-product	01-10-23	21,0
Northeast Conf. TFL	New York, NY	No particular product	02-03-28	2,0
PBA (Pennsylvania Bus Association)	York, PA	No particular product	01-04-03	1,5
Québec Winter Wonderland	Secaucus, NJ	Skiing	01-11-01	15,5
Receptive Service Association (RSA)	New York, NY	Tours	02-02-01	1,0
SportsGroup	Miscellaneous	Skiing	02-03-31	6,0
Spotlight Canada	Buffalo and Rochester, NY	Multi-product	02-03-01	2,5
Travel Expo	New York	Multi-product	02-03-01	1,5
USTOA Annual meeting	to be determined	Multi-product		10,2
Sub total	Marketplaces			77,2
Seminars				
Eastern Ski Council	Philadelphia, PA	Skiing	02-01-01	1,2
Gay & Lesbian	New York, NY	Tours	01-09-01	1,2
Gogo Worldwide Headquarters Training	Ramsey, NJ	No particular product	01-05-04	0,0
New Jersey Jamboree	Wayne, Morristown, NJ	Skiing	01-11-01	1,2
Seminar AAA Travel Agents	Buffalo, Rochester, NY	No particular product		7,0
Sub total	Seminars			10,6
Consumer Shows				
Big East Snowmobile Show	Syracuse	Snowmobiling	01-10-05	8,3
Lesbian World Travel Expo	New York City	Multi-product	01-04-19	1,0
Maryland Garden Show	Glen Burnie, MD	No particular product	01-10-01	1,5
National Ski & Snowboard Expo	Harrisburg, PA	Skiing	01-10-12	1,0
National ski Show	Scranton, PA	No particular product	01-10-05	1,0
National Ski show	Huntington, NY	Multi-product	01-10-26	1,5
National Ski Show	Washington, DC	Skiing	01-11-09	1,5
New York Adventure Travel Show	New York City	Adventure	02-02-01	2,0
Northeast Travel Show	Kingston, PA	No particular product	01-05-04	0,5
Americas Getaway Travel Show	Albany, NY	No particular product	01-04-25	0,5
The Baltimore Sun travel Show	Baltimore, MD	Multi-product	02-02-01	1,5
Washington Post Travel Show	Washington, DC	Tours	01-09-24	2,0
Winter Getaway Travel Show	Albany, NY	Tours	01-11-07	0,5
Sub total	Consumer Shows			22,8
Receptions				
Not for profit in Travel annual meeting	Washington, DC	Multi-product	02-03-01	3,0
Québec TO Reception	New York City	Multi-product		14,8
Miscellaneous reception	Multi-product	01-04-01		14,8
Sub total	Receptions			32,6
Familiarization Tours				
AAA Travel Agents		to be determined	Multi-product	7,4
Winter Products		to be determined	Multi-product	7,4
Sub total	Familiarization Tours			14,8
Total	Activities			158,0
Total	New York - Leisure			158,0

2001-2002 MARKETING PLAN

NEW ENGLAND

Category		City	Product	Date	Budget ('000)
ACTIVITIES					
Marketplaces					
	Bienvenue Québec	Québec	No particular product	01-10-01	0,0
	Nemice	Boston	Business, conventions, incentive	01-04-03	0,9
Sub total	Marketplaces				0,9
Consumer Shows					
	AAA Sales mission	New England	No particular product		0,0
	AAA Southern NE 2000 Auto Travel	Providence, RI, Worcester and Dedham, Montréal	No particular product	02-03-20	1,4
	Bastille Day	Montréal	No particular product	01-09-01	2,0
	Boston ShowSports Expo	Boston, MA	No particular product	01-11-01	6,0
	Canada tourism centre (sales mission)	Portland, ME, Boston, MA New Haven and Albany, NY	Multi-product	01-04-01	2,6
	Consumer information Kiosk	Vermont	Multi-product	01-06-01	0,2
	Eastern States Exposition (Big E)	West Springfield, MA	Multi-product	01-09-29	0,2
	Glamer	Newport, Boston and Portland	No particular product	01-04-27	3,5
	Main ASTA Trade Show	Portland, ME	Multi-product	01-10-25	0,2
	Mall of New Hampshire	No particular product	01-06-19	0,2	
	National Trade Show	Peabody, Manchester, NH Providence, RI and Windsor Locks	Multi-product	01-09-10	4,0
	Rhode Island Film Festival	Providence, RI	Urban stay	01-08-01	7,7
	Rhode Island Foreign Language Association		No particular product		0,5
	Ski Group 2001	Boston, MA	Skiing	01-04-30	1,3
	Travel Experience 2002	Pawtucket, RI	No particular product	01-10-01	1,2
	Travel Experiences 2002	Lincoln, RI	Multi-product	01-11-06	0,8
	Travel Night	Barre, VT	No particular product	01-11-01	0,7
	Vermont Society of Travel	Burlington, VT	No particular product	01-11-08	0,7
Sub total	Consumer Shows				33,2
Consumer Promotions					
	AMC		No particular product	02-02-01	4,0
	AMC promotion Boston	Boston, MA	No particular product	01-11-17	18,5
	Bibliothèque francophone de Boston	Boston, MA	No particular product	01-06-01	2,0
	Introduction of the Québec delegation to Boston		No particular product		0,5
	Miscellaneous Boston		No particular product		9,0
	Travel Exchange Trade Show	Burlington MA	No particular product	01-05-01	1,2
Sub total	Consumer Promotions				35,2
Receptions					
	International Federation of Women's Travel Organization	Montréal	No particular product	01-04-01	1,0
	Québec Day Cirque du Soleil	Boston, MA	Business, conventions, incentive	01-09-12	43,0
Sub total	Receptions				44,0
Familiarization Tours					
	Soft adventure	Québec region	No particular product		3,5
	Religious heritage	Québec region	No particular product		6,0
	Music tour operators		No particular product		2,5
Sub total	Familiarization tours				12,0

2001-2002 OPERATIONS PLAN

NEW ENGLAND (cont.)

Category		City	Product	Date	Budget ('000)
Press relations	Miscellaneous - Boston	Boston, MA	No particular product	02-03-31	50,0
<i>Sub total</i>	<i>Press relations</i>				<i>50,0</i>
Total	Activities				175,3
COOP PROMOTION PROGRAM					
PPC - Partners Abroad	Miscellaneous - to be determined		No particular product	01-04-01	7,5
<i>Sub total</i>	<i>PPC - Partners Abroad</i>				<i>7,5</i>
Total	Coop Promotion Program				7,5
Total	New England				182,8

2001-2002 MARKETING PLAN

PARIS

Category	City	Product	Date	Budget ('000)	
ADVERTISING					
Advertising - Overseas					
	Winter poster campaign - France	No particular product	01-04-01	460,0	
	Spring poster campaign - Belgium	No particular product	01-04-01	75,0	
	Spring poster campaign - France	No particular product	01-01-04	472,0	
	Hunting and fishing campaign	No particular product	01-04-01	90,0	
	Winter TV campaign	No particular product	01-04-01	910,0	
	Newspaper inserts	No particular product	01-04-01	165,0	
	Direct industry marketing - Belgium	No particular product	01-04-01	0,0	
	Direct industry marketing - France	No particular product	01-04-01	15,0	
	MCD Fax industrie Europe	No particular product	01-04-01	0,0	
	Partnership between Québec and Nouveau Brunswick	No particular product	01-04-01	50,0	
	QCGN Magazine support	No particular product	01-04-01	30,0	
	Business tourism	No particular product	01-04-01	20,0	
Sub total	Advertising - Overseas			2 287,0	
Total	Advertising			2 287,0	
ACTIVITIES					
Marketplaces					
	Adonet	Paris	Multi-product	02-01-01	0,5
	Bedouk	Paris	Business, conventions, incentive	02-01-01	5,0
	BTF	Brussels	Multi-product	01-11-01	5,5
	MIT International	Paris	Multi-product	01-10-01	7,0
	Motivation Québec	Paris, Brussels	Multi-product	02-01-01	15,0
	Top Resa	Deaucity	Multi-product	01-09-20	12,0
Sub total	Marketplaces			45,0	
Seminars					
	Incentive agencies	No particular product		12,0	
	Canada 3000 Aventure	Tours		12,0	
	Roadshow Vacances Air Transat	Multi-product		12,0	
	Vacances Air Canada	Tours		5,0	
Sub total	Seminars			41,0	
Consumer Shows					
	Country show	Paris	Hunting and fishing	01-05-12	5,0
	Mediterranean days	Iles-sur-la-Sorgue	Hunting and fishing	01-06-01	6,0
	L'Art du jardin	Paris	Tours	01-06-14	7,0
	Mondial du Deux Roues	Paris	No particular product	01-09-28	13,0
	Partir en hiver	Paris	Snowmobiling	01-11-04	10,0
	RandoExpo	Paris	Tours	02-04-01	11,0
	Salon chasse et pêche Belgique	Namur	No particular product	01-05-04	5,0
	Salon des vacances Bruxelles	Brussels	Tours	02-03-01	8,0
	Salon des vacances du Luxembourg	Luxembourg	Tours	02-01-01	6,0
	Salon des vacances Rennes	Rennes	Tours	02-01-01	6,0
	Salon du tourisme Nantes	Nantes	Multi-product	02-02-11	6,0
	Salon Mahana	Lyon	Tours	02-03-01	10,0
	Salon mondial du tourisme - Paris	Paris	Tours	02-03-01	18,0
	Salon tourisme Toulouse	Toulouse	Multi-product	02-02-01	8,0
	Salon vacances Marseille	Marseille	Tours	02-01-01	6,0
	SITV Colmar	Colmar	Multi-product	01-11-01	9,0
	Tourissima	Lille	Multi-product	02-02-01	6,0
Sub total	Consumer Shows			140,0	

2001-2002 OPERATIONS PLAN

PARIS (cont.)

Category	City	Product	Date	Budget ('000)
Consumer Promotions				
		Development of agency networks		40,0
		Groupe Larivière		15,0
		L'Express		20,0
		Marguerite Volant		10,0
	France, Belgium	Updating of the tour operators' list		10,0
Sub total	Consumer Promotions			95,0
Receptions				
	Brussels	Belgian reception		3,0
	Paris	French reception	01-04-01	6,0
		Partners' reception	01-12-01	2,0
Sub total	Receptions			11,0
Familiarization Tours				
		Belgian decision makers		5,0
		Experts Canada decision makers	01-10-01	5,0
	Montréal and Québec	French winter and spring decision makers	01-05-23	6,0
		Winter tour operators	02-03-01	10,0
Sub total	Familiarization Tours			26,0
Press Relations				
		Harricana		100,0
		Pres tours		190,0
Sub total	Press Relations			290,0
Total	Activities			648,0
COOP PROMOTION PROGRAM				
PPC – Partners Abroad				
		Aventura	01-04-01	5,0
		Canada 3000 Adventure	01-04-01	20,0
		Canadian company	01-04-01	60,0
		Miscellaneous	01-04-01	20,0
		Montana	01-04-01	5,0
		Nouvelles Frontières	01-04-01	100,0
		Vacances Air Canada	01-04-01	15,0
		Vacances Air Transat	01-04-01	60,0
Sub total	PPC – Partners Abroad			285,0
Total	Coop Promotion Program			285,0
Total	Paris			3 220,0

2001-2002 MARKETING PLAN

LONDON

Category		City	Product	Date	Budget ('000)
ADVERTISING					
Advertising - Overseas					
	England - Phoenix		No particular product	01-04-01	0,0
	Metro fall campaign		No particular product	01-04-01	200,0
	CTC Canada Incentive Brochure		No particular product	01-04-01	1,7
	CTC TV (Incl. Direct Mail)		No particular product	01-04-01	200,0
	Québec Solus Campaign		No particular product	01-04-01	400,0
	Selling Long Haul		No particular product	01-04-01	15,0
	TTG / TW / C & IT Magazine / M & IT Magazine		No particular product	01-04-01	26,0
Sub total	Advertising - Overseas				842,7
Total	Advertising				842,7
ACTIVITIES					
Marketplaces					
	Abta UK	Lisbon, Spain	Multi-product	01-11-01	4,0
	Canada Specialists Series	Miscellaneous	Multi-product	01-04-01	2,0
	Confex	London	Business, conventions, incentive	02-03-01	10,0
	Product Profiles		No particular product		3,0
	Scandinavian Countries	Denmark, Sweden and Norway	No particular product	01-04-01	25,0
	Spotlight Canada	London	Multi-product	02-03-01	10,0
	The Netherlands Marketplaces	Netherlands	No particular product		3,0
	World Travel Market	London	Multi-product	01-11-01	10,0
Sub total	Marketplaces				67,0
Seminars					
	Canada Counsellors Outlook Programme	United Kingdom	Multi-product	01-04-01	3,0
	Canada Seminars	United Kingdom	Multi-product	01-04-01	5,0
	Canada Travel Specialists	London	Multi-product	01-06-01	3,5
	Scandinavian Road Show	Denmark, Sweden and Norway	Skiing	01-10-01	4,5
	Training Video and Programme Management	United Kingdom	Multi-product	01-04-01	15,0
	Reprint / Storage and mail out				
	Visit USA / Canada Workshop	Denmark	Multi-product	02-03-01	2,0
Sub total	Seminars				33,0
Consumer Shows					
	Birmingham Holiday Show	Birmingham	Multi-product	02-02-01	0,5
	Bournemouth Holiday Show	Bournemouth	Multi-product	02-01-01	5,0
	Cheltenham Holiday Show	Cheltenham	Multi-product	02-01-01	0,5
	Destinations 2002	London	Multi-product	02-02-01	10,0
	Dublin Show	Ireland	Multi-product	02-01-01	5,0
	Excel Holiday Show	London	Multi-product	02-03-01	0,5
	Holiday Show	Glasgow	Multi-product	02-02-01	1,0
	Holiday Show G-Mex	Manchester	Multi-product	02-01-01	10,0
	Holidays Show	Belfast and Cork	Multi-product	02-02-01	1,0
	Ski Show	London	Skiing	01-10-01	10,0
	TUR - Göteborg	Sweden	Multi-product	02-03-01	3,0
	Vakantie	Pays-Bas	Multi-product	02-01-01	5,0
Sub total	Consumer Shows				51,5

2001-2002 OPERATIONS PLAN

LONDON (cont.)

Category	City	Product	Date	Budget ('000)
Consumer Promotions				
		No particular product		8,7
		No particular product		5,2
	United Kingdom	Business, conventions, incentive	01-06-01	50,0
		No particular product		9,9
		No particular product		3,5
		No particular product		59,4
	United Kingdom	Business, conventions, incentive	02-03-01	6,5
		No particular product		17,0
	United Kingdom	No particular product	01-10-01	1,0
	United Kingdom	Multi-product	01-10-01	2,5
	United Kingdom	No particular product	01-08-01	5,0
Sub total	Consumer Promotions			168,7
Receptions				
	London	Multi-product		3,0
	London	Multi-product	01-12-01	1,0
	London	Multi-product		0,5
	London	Multi-product	02-02-01	8,0
	London	Business, conventions, incentive	02-03-01	1,0
	London	Multi-product	02-02-01	7,0
	United Kingdom	Multi-product	01-04-01	1,0
	London	Multi-product		10,0
Sub total	Receptions			31,5
Familiarization Tours				
		No particular product	02-01-01	0,5
		No particular product	01-05-01	2,0
		No particular product		2,0
		No particular product		4,0
		No particular product		1,0
		Business, conventions, incentive	01-09-01	10,0
		No particular product	01-06-01	2,5
	Montréal and Québec	Urban stay	01-07-01	6,0
		No particular product		4,0
	Miscellaneous	Multi-product		10,0
		No particular product		2,0
	Charlevoix, Mont-Sainte-Anne, Stoneham and Québec region	Skiing	02-01-01	5,0
Sub total	Familiarization Tours			49,0
Press Relations				
		No particular product		50,0
	United Kingdom	No particular product	01-04-01	100,0
Sub total	Press Relations			150,0
Total	Activities			550,7

LONDON (cont.)

Category	City	Product	Date	Budget ('000)
COOP PROMOTION PROGRAM				
PPC – Partners Abroad				
	All Canada	Multi-product	01-04-01	10,0
	BA Holidays	Multi-product	01-04-01	10,0
	Bridge Travel	Urban stay	01-04-01	10,0
	Canada 3000	Multi-product	01-04-01	15,0
	Globespan	Multi-product	01-04-01	30,0
	Tailor Made Travel	Multi-product	01-04-01	20,0
	Thomas Cook	Multi-product	01-04-01	15,0
	Travel 4	Multi-product	01-04-01	16,5
	TravelBag	Multi-product	01-04-01	20,0
	Travelscene	Urban stay	01-04-01	10,0
	Virgin Atlantic	Multi-product	01-04-01	20,0
<i>Sub total</i>	<i>PPC – Partners Abroad</i>			176,5
Total	Coop Promotion Program			176,5
Total	London			1 569,9

2001-2002 OPERATIONS PLAN

VLOTHO

Category		City	Product	Date	Budget ('000)
ADVERTISING					
Advertising - Overseas					
	CCT all inclusive package deals		No particular product	01-04-01	205,0
	Direct mailing		No particular product	01-04-01	20,0
	Intergerma manual		No particular product	01-04-01	3,0
	E-mailed incentive Newsletter		No particular product	01-04-01	1,0
	Québec printed media campaign or consumer promos / shared marketing		No particular product	01-04-01	300,3
	List of travel organizers / Data on Québec		No particular product	01-04-01	12,0
	Québec A to Z / Answer cards on Québec				
	Industry campaign		No particular product	01-04-01	20,0
	Travel Talk Competition		No particular product	01-04-01	10,0
Sub total	Advertising - Overseas				571,3
Total	Advertising				571,3
ACTIVITIES					
Marketplaces					
	EIBTM	Geneva (Switzerland)	Business, conventions, incentive	01-05-29	49,7
	ITB	Berlin (Germany)	Multi-product	02-03-01	22,5
	TTW Montreux		Multi-product	01-10-01	5,5
Sub total	Marketplaces				77,7
Seminars					
	Air Canada Sales Blitz	East Germany	Multi-product	01-10-01	3,0
	CTC Roadevent	Zurich, Munich, Düsseldorf, Hamburg, Frankfurt and Berlin	Multi-product	01-08-27	30,0
	DER Roadshow	12 cities in Germany	No particular product	02-01-01	3,0
	Sales missions - Québec	Stuttgart, Hanover and Cologne	Multi-product	01-08-30	35,0
	Reisebürostammtisch	Hanover	Multi-product	01-04-09	1,5
	Sky Tours Roadshow	10 cities in Switzerland	Multi-product	02-02-01	4,0
	Visit North America seminar	Zurich	Multi-product	02-01-15	8,0
Sub total	Seminars				84,5
Consumer Shows					
	CAN AM	Frankfurt	Multi-product	01-06-02	2,0
	CBR	Munich	Multi-product	02-02-01	1,6
	CMT	Stuttgart	Multi-product	02-01-01	2,0
	Feerie de Genève	Geneva	Multi-product	01-11-01	2,0
	Ferien	Vienna	Multi-product	02-01-01	1,0
	Ferienmesse	Berne	Multi-product	02-01-11	3,8
	Fespo	Zurich	No particular product	02-01-01	3,8
	Fespo	Geneva	No particular product	02-02-01	3,8
	Reisemarkt	Cologne	Multi-product	01-12-01	1,1
	Reisen	Hamburg	Multi-product	02-02-01	1,6
	Tourf	Salzburg	Multi-product	02-02-01	1,0
	Tourist Caravan	Leipzig	Multi-product	01-11-01	1,1
Sub total	Consumer Shows				24,8

2001-2002 MARKETING PLAN

VLOTHO (cont.)

Category		City	Product	Date	Budget ('000)
Consumer Promotions					
	Shared marketing and consumer advertising / Switzerland		No particular product	01-04-01	100,0
	Miscellaneous		No particular product		10,0
	Manor	Switzerland	No particular product	01-04-01	5,0
	Whale and dolphin conservation society (WDCS) competition	Germany	No particular product	01-10-01	4,0
Sub total	Consumer Promotions				119,0
Receptions					
	Air Canada / Québec theme evening	Geneva	No particular product		5,0
	CBR travel organizers' evening	Munich	No particular product	02-02-01	1,1
	Cirque du Soleil	Zurich	Multi-product	01-09-28	14,0
	CMT travel organizers' evening	Stuttgart	No particular product	02-01-01	1,1
	Halloween reception	Vlotho	No particular product	01-10-01	1,5
	ITB - seller's briefing	Berlin	No particular product		1,3
	ITB Canada reception	Berlin	No particular product		5,0
	Swiss travel organizers' luncheon		No particular product		2,0
	Industry meetings		No particular product		0,5
Sub total	Receptions				31,5
Familiarization Tours					
	CSP familiarization tour	Germany	Multi-product	01-05-21	5,0
	DER Academy		No particular product	01-11-01	20,0
	Fabulous Fun (Winter)	Germany and Switzerland	No particular product		5,0
	Jahrmakrt incentive winner	Germany	No particular product		1,0
	"Fabulous fun" travel organizers' festival familiarization tour	Germany	Multi-product	01-07-13	11,0
	Seminar on the isit North America familiarization tour	Switzerland	No particular product	01-06-01	5,0
	Tombola winner Newsletter	Germany / Switzerland	No particular product		3,0
Sub total	Familiarization Tours				50,0
Press Relations					
	Germany W&P PR agency	Germany	No particular product	01-04-01	265,0
	Swiss PR and promotional agency		No particular product	01-04-01	60,0
	Swiss press conferences		No particular product	01-04-01	2,0
	Web site – German version		No particular product	34,0	
	Press tours in Germany		No particular product	01-04-01	60,0
	Pres tours in Switzerland		No particular product	01-04-01	20,0
Sub total	Press Relations				441,0
Total	Activities				828,5
COOP PROMOTION PROGRAM					
PPC – Partners Abroad					
	Canusa		No particular product	01-04-01	30,0
	DERTOUR		No particular product	01-04-01	45,0
	Miscellaneous		No particular product	01-04-01	6,0
	Hotelplan		No particular product	01-04-01	10,0
	LTU / Meier's Weltreisen		Multi-product	01-06-01	35,0
	Sky tours		No particular product	01-04-01	4,0
	Studiosus		No particular product	01-04-01	10,0
Sub total	PPC – Partners Abroad				140,0
Total	Coop Promotion Program				140,0
Total	Vlotho				1 539,8

2001-2002 OPERATIONS PLAN

TOKYO

Category	City	Product	Date	Budget ('000)
ADVERTISING				
Advertising - Overseas				
	Movie campaign	No particular product	01-04-01	80,0
	PHP Media Mix Project	No particular product	01-04-01	280,0
Sub total	Advertising - Overseas			360,0
Total	Advertising			360,0
ACTIVITIES				
Marketplaces				
	Kanata 2000	Tokyo and Osaka	Tours	40,0
	Québec DMO Mission	Osaka, Nagoya and Tokyo	Multi-product	40,0
Sub total	Marketplaces			80,0
Seminars				
	Local industry seminars	10 cities in Japan	Multi-product	10,0
Sub total	Seminars			10,0
Consumer Shows				
	JATA 2001	Tokyo	Multi-product	8,0
Sub total	Consumer Shows			8,0
Consumer Promotions				
	Saltimbanco promotion with Fuji TV	Tokyo	No particular product	10,0
Sub total	Consumer Promotions			10,0
Receptions				
	Air Canada golf tournament	Osaka	Multi-product	4,0
	Québec Reception	Tokyo and Osaka	Multi-product	15,0
	The 23rd Canada Cup Golf tournament	Ibaragi	Multi-product	4,0
Sub total	Receptions			23,0
Familiarization Tours				
	AC	Tokyo and Osaka	Multi-product	5,0
	NW or JAL	Tokyo and Osaka	Tours	5,0
Sub total	Familiarization Tours			10,0
Press Relations				
	Ontario / Québec Tourism News		No particular product	10,0
	Printed media and TV		No particular product	90,0
	Québec Media club		No particular product	15,0
Sub total	Press Relations			115,0
Total	Activities			256,0
COOP PROMOTION PROGRAM				
PPC - Partners Abroad				
	Air Canada		No particular product	20,0
Sub total	PPC - Partners Abroad			20,0
Total	Coop Promotion Program			20,0
Total	Tokyo			636,0

SOUTHEAST ASIA

Category	City	Product	Date	Budget ('000)
ADVERTISING				
Advertising - Overseas				
Advertising ad hoc		No particular product	01-04-01	20,0
<i>Sub total</i>	<i>Advertising - Overseas</i>			<i>20,0</i>
Total	Advertising			20,0
ACTIVITIES				
Marketplaces				
PATA (Pacific Asia Travel)		No particular product		1,0
PATA - Vusamart Marketplace	Mexico	No particular product	01-09-25	2,0
Showcase Canada	Asia	Multi-product	01-10-01	10,0
Taipei Travel Fair	Taipei	Multi-product	01-11-01	5,0
<i>Sub total</i>	<i>Marketplaces</i>			<i>18,0</i>
Seminars				
Southeast travel organizers	Asia	Multi-product		10,0
<i>Sub total</i>	<i>Seminars</i>			<i>10,0</i>
Familiarization Tours				
Commercial visits		No particular product	01-04-01	10,0
<i>Sub total</i>	<i>Familiarization Tours</i>			<i>10,0</i>
Press Relations				
Miscellaneous		No particular product	01-04-01	15,0
Group media tours / TV crews		No particular product	01-04-01	20,0
Individual pres tours		No particular product	01-04-01	15,0
Press luncheons		No particular product	01-04-01	20,0
<i>Sub total</i>	<i>Press Relations</i>			<i>70,0</i>
Total	Activities			108,0
COOP PROMOTION PROGRAM				
PPC - Partners Abroad				
Coach operators and travel organizers - Hong Kong		Multi-product	01-04-01	20,0
Coach operators and travel organizers - Korea		Multi-product	01-04-01	25,0
Coach operators and travel organizers - Taiwan CTC		Multi-product	01-04-01	115,0
<i>Sub total</i>	<i>PPC - Partners Abroad</i>			<i>160,0</i>
Total	Coop Promotion Program			160,0
Total	Southeast Asia			288,0

2001-2002 OPERATIONS PLAN

ITALY

Category		City	Product	Date	Budget ('000)
ADVERTISING					
Advertising - Overseas					
	Printed spring/summer campaign		No particular product	01-04-01	100,0
	Encart Congress Today		No particular product	01-04-01	25,0
	Special TTG		No particular product	01-04-01	10,0
	TQ (campaign repeat)		No particular product	01-04-01	100,0
Sub total	Advertising - Overseas				235,0
Total	Advertising				235,0
ACTIVITIES					
Marketplaces					
	BIT	Milan	Multi-product	02-02-01	10,0
	Travel Trend	Milan	Business, conventions, incentive	01-10-01	6,0
	TTG Incontri	Riva del gorda	Multi-product	01-10-01	5,0
Sub total	Marketplaces				21,0
Seminars					
	Québec Italy seminars	Turin, Milan, Genoa and Rome	Multi-product	01-04-19	4,0
	TTG Roadshow	Sécity	Multi-product	01-03-01	10,0
Sub total	Seminars				14,0
Consumer Shows					
	Ciclomoto	Milan	Snowmobiling	01-09-01	10,0
	Expoflora	Genoa	Multi-product	01-05-01	5,0
	Fiera di Padova	Padova	Tours	01-05-25	10,0
	Tour Mondoshow	Bologna	Multi-product	01-06-01	10,0
Sub total	Consumer Shows				35,0
Receptions					
	Miscellaneous receptions		Multi-product	01-04-01	5,0
Sub total	Receptions				5,0
Familiarization Tours					
	Canada Specialists Italy	Montréal, Québec and Tadoussac	Multi-product	01-05-29	15,0
	Miscellaneous tours		Multi-product	01-04-01	10,0
Sub total	Familiarization Tours				25,0
Press Relations					
	Press tours		No particular product	01-04-01	35,0
Sub total	Press Relations				35,0
Total	Activities				135,0
COOP PROMOTION PROGRAM					
PPC - Partners Abroad					
	CTS		Multi-product	01-04-01	45,0
	Miscellaneous		No particular product	01-04-01	15,0
	Giver Viaggi e Crociere		Multi-product	01-04-01	15,0
	Sei Viaggi		No particular product	01-04-01	5,0
Sub total	PPC - Partners Abroad				80,0
Total	Coop Promotion Program				80,0
Total	Italy				450,0

SPAIN					
Category		City	Product	Date	Budget ('000)
ACTIVITIES					
Marketplaces	FITUR	Madrid	Multi-product	02-01-01	15,0
<i>Sub total</i>	<i>Marketplaces</i>				15,0
Receptions	Québec evening	Barcelona	Multi-product	02-01-01	5,0
<i>Sub total</i>	<i>Receptions</i>				5,0
Press Relations	Media tours		No particular product	01-04-01	15,0
<i>Sub total</i>	<i>Press Relations</i>				15,0
Total	Activities				35,0
COOP PROMOTION PROGRAM					
PPC – Partners Abroad	Miscellaneous		No particular product	01-04-01	15,0
<i>Sub total</i>	<i>PPC – Partners Abroad</i>				15,0
Total	Coop Promotion Program				15,0
Total	Spain				50,0

2001-2002 OPERATIONS PLAN

MEXICO					
Category		City	Product	Date	Budget ('000)
ADVERTISING					
Advertising - Americas - Summer					
	Québec campaign		No particular product	01-04-01	310,0
	Radio Cien		No particular product	01-04-01	20,0
Sub total	Advertising - Americas - Summer				330,0
Total	Advertising				330,0
ACTIVITIES					
Marketplaces					
	Conozca Canada 2001	Mexico, Guadalajara	Multi-product	01-05-29	10,0
	Expo Aventura Turismo		No particular product		5,0
	Invierno		Multi-product		5,0
	World Youth and Student Travel Conference (WYSTA)				12,0
Sub total	Marketplaces				32,0
Consumer Promotions					
	Production of a Conozca Québec brochure	Business, conventions, incentive		01-04-01	25,0
	Translation of brochures		No particular product	01-04-01	25,0
Sub total	Consumer Promotions				50,0
Seminars					
	Air Canada		No particular product		5,0
	Onvisa		No particular product		5,0
Sub total	Seminars				10,0
Receptions					
	Québec activity		No particular product		25,0
Sub total	Receptions				25,0
Familiarization Tours					
	Tour operator tours		Multi-product		25,0
Sub total	Familiarization Tours				25,0
Press Relations					
	Public relations contract		No particular product		80,0
	Radio Cien		No particular product		5,0
	Media tours		No particular product		10,0
Sub total	Press Relations				95,0
Total	Activities				237,0
COOP PROMOTION PROGRAM					
PPC – Partners Abroad					
	Miscellaneous		No particular product	02-03-31	45,0
Sub total	PPC – Partners Abroad				45,0
Total	Coop Promotion Program				45,0
Total	Mexico				612,0

ARGENTINA

Category	City	Product	Date	Budget ('000)
ADVERTISING				
Advertising - Americas - Summer				
	Julia Tours and Air Canada	No particular product	01-04-01	15,0
Sub total	Advertising - Americas - Summer			15,0
Total	Advertising			15,0
ACTIVITIES				
Marketplaces				
	Atelier	No particular product		2,0
	Feria Internacional de Turismo	Multi-product		3,0
Sub total	Marketplaces			5,0
Receptions				
	Québec Activity	No particular product		10,0
Sub total	Receptions			10,0
Press Relations				
	Media tours	No particular product		10,0
Sub total	Press Relations			10,0
Total	Activities			25,0
Total	Argentina			40,0

2001-2002 OPERATIONS PLAN

BRAZIL

Category	City	Product	Date	Budget ('000)
ADVERTISING				
Advertising - Americas - Summer Campaign		No particular product	01-04-01	60,0
<i>Sub total</i>	<i>Advertising - Americas - Summer</i>			<i>60,0</i>
Total	Advertising			60,0
ACTIVITIES				
Marketplaces				
ABAV	Brazil	Multi-product		5,0
BRAZTOA		Multi-product		15,0
<i>Sub total</i>	<i>Marketplaces</i>			<i>20,0</i>
Seminars				
CVC		No particular product		5,0
Soletur		No particular product		10,0
<i>Sub total</i>	<i>Seminars</i>			<i>15,0</i>
Receptions				
Québec activity		No particular product		10,0
<i>Sub total</i>	<i>Receptions</i>			<i>10,0</i>
Familiarization Tours				
Urbi and Orbi familiarization tours	Québec	Multi-product	01-04-01	0,4
Tour operator tours		No particular product		14,6
<i>Sub total</i>	<i>Familiarization Tours</i>			<i>15,0</i>
Press Relations				
Media tours		No particular product		10,0
<i>Sub total</i>	<i>Press Relations</i>			<i>10,0</i>
Total	Activities			70,0
COOP PROMOTION PROGRAM				
PPC - Partners Abroad				
Other Latin American markets		No particular product	01-04-01	30,0
<i>Sub total</i>	<i>PPC - Partners Abroad</i>			<i>30,0</i>
Total	Coop Promotion Program			30,0
Total	Brazil			160,0

AUSTRALIA

Category	City	Product	Date	Budget ('000)
ADVERTISING				
Advertising - Overseas				
Advertising - CTC		No particular product	01-04-01	10,0
<i>Sub total</i>	<i>Advertising - Overseas</i>			10,0
Total	Advertising			10,0
ACTIVITIES				
Seminars				
Canada Specialists program		Multi-product		5,0
Corroboree 2002	Brisbane, Melbourne, Adelaide, Perth and Sydney	Multi-product	02-01-15	5,0
<i>Sub total</i>	<i>Seminars</i>			10,0
Familiarization Tours				
Air Canada, Gay market		No particular product		5,0
Canada Specialists program		Tours		10,0
<i>Sub total</i>	<i>Familiarization Tours</i>			15,0
Press Relations				
Medial tour		No particular product	01-04-01	10,0
<i>Sub total</i>	<i>Press Relations</i>			10,0
Total	Activities			35,0
COOP PROMOTION PROGRAM				
PPC - Partners Abroad				
Discover Holidays		No particular product	01-04-01	10,0
Great Adventure Holidays		No particular product	01-04-01	5,0
<i>Sub total</i>	<i>PPC - Partners Abroad</i>			15,0
Total	Coop Promotion Program			15,0
Total	Australia			60,0

2001-2002 OPERATIONS PLAN

NEW ZEALAND

Category	City	Product	Date	Budget ('000)
ADVERTISING				
Advertising - Overseas				
Advertising - CCT		No particular product	01-04-01	5,0
<i>Sub total</i>	<i>Advertising - Overseas</i>			5,0
Total	Advertising			5,0
ACTIVITIES				
Seminars				
Canada Calls	Auckland	Tours	01-01-25	5,0
<i>Sub total</i>	<i>Seminars</i>			5,0
Press Relations				
Media tours		No particular product	01-04-01	5,0
<i>Sub total</i>	<i>Press Relations</i>			5,0
Total	Activities			10,0
Total	New Zealand			15,0

Tourism in Québec

VOLUME OF TOURISTS (IN THOUSANDS)

Market of Origin	1996	1997	1998	1999	2000
United States	1 920	1 890	2 082	2 198	2 257
• New England	552	605	678	757	815
• Atlantique Centre	761	674	682	800	779
• Midwest	300	299	347	310	303
• South	170	171	220	194	221
• West	137	141	156	138	140
Other Countries	1 242	1 225	1 180¹	1 268¹	1 315¹
• France	390	386	353 ¹	411 ¹	406 ¹
• United Kingdom	118	112	122 ¹	106 ¹	134 ¹
• Germany	107	87	82 ¹	88 ¹	88 ¹
• Japan	65	53	106 ¹	80 ¹	73 ¹
Sub total – International Tourism	3 162	3 115	3 262	3 466	3 572
Canada (excluding Québec)	n.c.	2 658	2 786	3 095	2 892 ^p
Québec	n.c.	11 463	12 733	13 036	14 482 ^p
Total	n.c.	17 236	18 781	19 597	20 945

n.c.: Not comparable. Information in the Canadian Travel Survey for 1996 is not indicated because it cannot be compared to information from preceding years.

P = Statistics Canada preliminary estimates likely to be revised

1 = Data adjusted by Tourisme Québec on the basis of border crossings.

Source: Statistics Canada

TOURIST SPENDING (in thousands of dollars)

Markets of Origin	1996	1997	1998	1999	2000
United States	853	804	924	1 081	1 147
New England	168	188	218	270	293
Atlantique Centre	361	291	308	415	409
Midwest	157	140	162	162	166
South	94	100	138	144	170
West	73	84	98	90	110
Other countries	959	988	991¹	1 040¹	1 068¹
• France	369	355	361 ¹	373 ¹	350 ¹
• United Kingdom	55	85	74 ¹	56 ¹	75 ¹
• Germany	65	64	54 ¹	55 ¹	53 ¹
• Japan	52	48	86 ¹	67 ¹	66 ¹
Sub total – International Tourism	1 812	1 792	1 915	2 121	2 215
Canada (excluding Québec)	n.c.	549	698	735	809 ^p
Québec	n.c.	1 372	1 678	1 831	2 251 ^p
Total	n.c.	3 713	4 291	4 687	5 275^p

n.c.: Not comparable. Information in the Canadian Travel Survey for 1996 is not indicated because it cannot be compared to information from preceding years. The same applies to the year 2000.

P = Statistics Canada preliminary estimates likely to be revised

1 = Data adjusted by Tourisme Québec on the basis of border crossings.

Source: Statistics Canada

The Publishing Program

Product	Print run	Languages	Targeted markets
Novelties leaflet	1 000	French	Québec, Canada,
	1 000	English	United States, Europe
Casinos folder	150 000	English	Canada, 50 000
	150 000	French	United States 100 000 Québec
Meeting in Québec	40 000	English	United States, Canada
	10 000	French	France
Accommodation in Québec (1)	110 000	French	Multi-market
	90 400	English	
Accommodation in Québec (2)	20 400	French	Multi-market
	65 400	English	
Québec Amérique	Reissued based on demand	French, English, Italian, Spanish, German, Portuguese Mandarin and Japanese	Multi-market
Golf Brochure	10 000	French	United States, Canada Québec
	50 000	English	
Snowmobile brochure	50 000	French	France, Switzerland, Belgium, United States, Ontario and United Kingdom Italy
	50 000	English	
	15 000	Italian	
Profile Form	16 500	English	Canada and the United States
National parks theme tours	105 000	German	Multi-market
	60 000	French	
	105 000	English	
	15 000	Spanish	
	25 000	Italian	
Fishing and Hunting Packages	60 000	English	United States and Ontario
Ski Brochure	20 000	English	United States, Europe

Product	Print run	Languages	Targeted markets
Special Events	Summer:		Multi-market
	80 000	French	
	80 000	English	
	Winter:		
	38 700	French	
	34 000	English	
Flyer in Japanese	40 000	Japanese	Japan
Destination Excellence	1 400 000	French	Québec, Canada, United States
	425 000	English	
Churches in Québec - Sacred Splendours	5 000	Spanish	South America Spain, Portugal
	5 000	Portuguese	
Positioning brochure on Mexico	1 000	Spanish	Mexico
Video on Québec	To be determined	French,	Multi-market
		English, Italian, German, Japanese, Portuguese, Spanish	
Video-clip and DVD on Québec	1 000	Not narrated	Multi-market
New CD photos	1 000		Multi-market