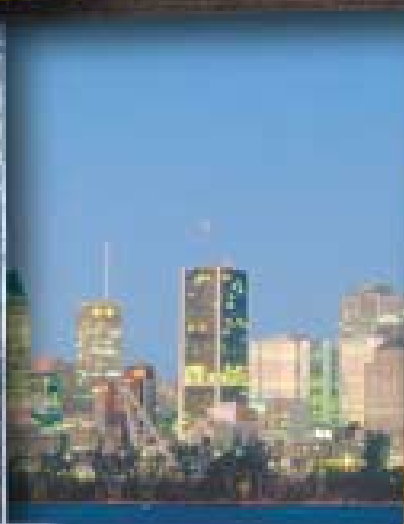


Québec

Marketing Plan 2002-2003



Tourisme

Québec



2002-2003

Marketing Plan

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Foreword

The 2002-2003 *Marketing Plan* presents the guidelines, strategies and action priorities of the government of Quebec with respect to tourism marketing. With the goal of making known the products and services offered to the tourism industry and to eventual partners, this document covers the array of Tourisme Québec's planned marketing activities.

In addition to being a reference tool for the entire tourism industry, the plan is also designed as a mean to further the development of promotional partnerships by identifying opportunities offered in this field. The information in the plan will ensure better customer service for the various clienteles of the tourism industry, an objective at the heart of Tourisme Québec's mission.

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1 Performance and Outlook

It is said that the past paves the way for the future. This chapter presents an overview of the Québec tourism industry's performance for 2001 and the prospects for 2002.

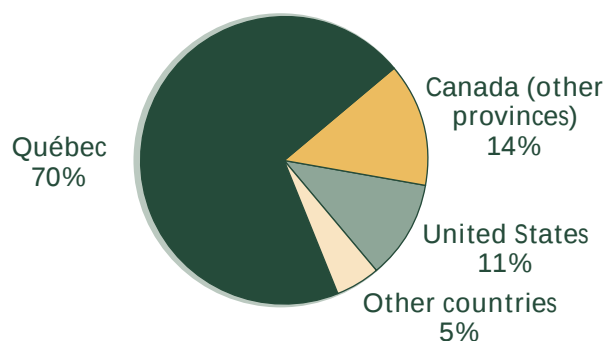
Solid Results for Québec Tourism in 2001

The results for 2001 indicate that despite the significant events that disrupted tourism activity around the globe, the industry's growth in Québec was maintained. In effect, the onset of the economic slowdown and the attacks of September 11th, 2001 had only a slight effect on the growth of Quebec's tourism industry.

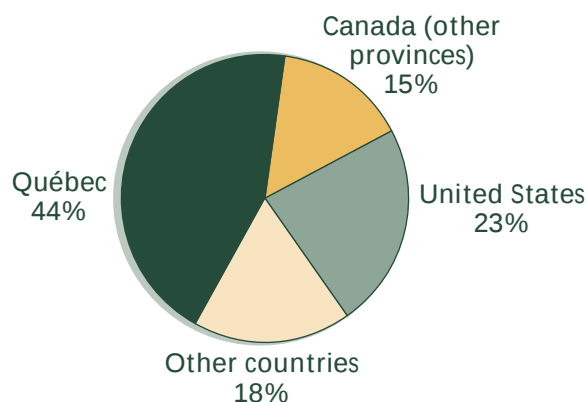
Preliminary figures for 2001 indicate that:

- Domestic markets contributed to an improvement of the situation. Indeed, we note:
 - Volume increases of 2.4% and tourist spending increases of 4.9% in Québec, for an estimated 21.4 million tourists and tourist spending of \$5.5 billion;
 - Tourist travel by Quebecers within Québec continued to demonstrate growth, but at a slower pace than in 2000. Travel by Quebecers within Québec increased by 3.5%, while revenue increased by 8% to reach 15 million trips and \$2.4 billion in revenue, respectively;
 - An upturn in the Canadian market: although the number of Canadian tourists in Québec did not attain the level achieved in 1999, an increase over 2000 was noted. Canadian tourists, excluding Quebecers, took 3 million trips and spent \$0.9 billion, which corresponds to a growth of 3% and 6%, respectively.
- There was an increase in the American market:
 - Despite the events of September 11th, the number of American tourists in Québec experienced a significant increase. The number of American tourists grew by 3.1%, or 2.3 million trips, and the increase in spending was 10.4% for a threshold of \$1.3 billion. Growth in both areas was greater than that of 2000.

- These positive results are due to this industry's well-maintained position prior to the events of September 11th, as the number of American tourists who crossed the Québec borders from January to August 2001 was up by 6.2%. A decrease of 18.3% occurred in September and October, and in November the start of the upturn was felt to the point that in December, an increase of 5.1% was noted over the same month of the previous year. We note that since the events of September 11th, travel by automobile has gained ground as the transportation method most used by Americans coming to Québec.
- Overseas clientele suffered a significant decrease:
 - The events of September 11th, 2001 significantly affected the number of overseas travellers to Québec, as their numbers are the lowest experienced over the last five years. Trips to Québec by tourists from other international markets decreased by 12.5% and spending decreased by 8.5%, which represents 1.2 million trips and \$1.0 billion in expenses.
 - As early as May 2001, when the onset of the economic slowdown began to be felt, border crossings by overseas tourists were down. The events in New York only heightened this phenomenon; recovery is much slower than that of the other markets.

Origin of the 21.4 million tourists in 2001

Sources: Statistics Canada, International Travel Survey and Canadian Travel Survey

Source of the \$5.5 billion in tourism revenue in 2001

Sources: Statistics Canada, International Travel Survey and Canadian Travel Survey

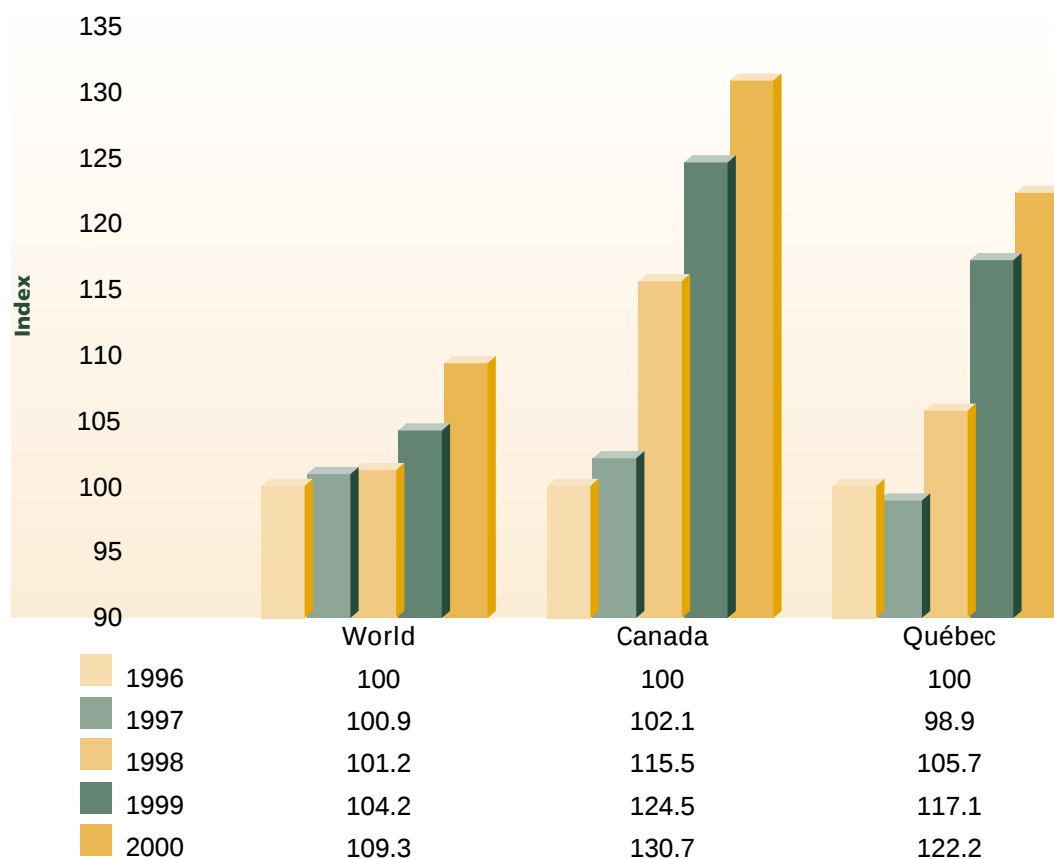
International Tourism:

Quebec's Results are Comparable to the Results for Canada

Québec, Canada and the rest of the world achieved overall results comparable to those of 2000 with respect to international tourism.

- Preliminary figures for 2001 indicate that:
 - According to border crossing statistics, Canada welcomed 19.6 million international tourists, 15.5 million of whom were from the United States and 4.1 million from other countries. This result is comparable to that obtained in 2000, which numbered 19.7 million, with a slight decrease of 0.1% for international tourists. However, in 2001, there were 2% more tourists from the United States and 7.4% fewer tourists from countries other than the United States in Canada;
 - In Québec, the results from border crossings, including tourists who travelled in Québec and those that entered the country through another province, indicate that there were 2.7 million international tourists, which represents a decrease of 1.7% over 2000;
 - Quebec's results are relatively similar to those of the principal Canadian provinces. While Québec and British Columbia experienced slight decreases over 2000, Ontario experienced a slight increase;

Evolution of the International Tourism Revenue Index



- With respect to international revenue, Québec experienced a 5.1-point increase of its performance index between 1999 and 2000, which is equal to that of worldwide tourism revenue (5.1 points).
- Growth outlook for 2002:
 - Domestic market growth should be maintained:
In 2002, growth in the number of Quebec and Canadian tourists in Québec should remain at the same rate as that of 2001. The growth rate of the Québec market should settle at 3%, and that of the Canadians from other provinces at 2.5%.
 - A modest recovery for international markets:
Québec should experience a slight increase in its American and international markets; however, the number of international tourists will remain lower than that of 2000. The growth rate of the American market should be 2%, and that of overseas markets, 1.5%.

2 Guidelines and Objectives

The development of the Québec tourism industry can be explained by the loyalty of its clientele from its closest markets Québec, Ontario, north-eastern United States in particular. However, client segmentation and fierce competition are forcing Québec to improve tourism marketing. In addition, Québec must seek to diversify its international markets. The *2000-2005 Tourism Marketing Strategy**, made public in November 2000, places emphasis on markets that provide the best return on investment.

In order to position and market Québec, Tourisme Quebec's 2002-2003 budget is in the amount of \$34 million. Additional funds are also invested in promotion through financial support to the industry.

2.1 LEISURE TOURISM PRIORITY MARKETS

Once again, priority markets were selected based upon Quebec's current results on these markets and certain variables, favourable to profitable development in the future, such as trips abroad, Quebec's market share in Canada, the growth rate, accessibility, etc.

In addition, this year Tourisme Québec will place additional emphasis on markets in close proximity, since further to the events of September 11th, 2001, travel by automobile has gained ground as a transportation method used by American tourists.

The three main strategies of the previous year are being retained:

Securing and Maintaining Loyalty

This strategy targets mature markets and implies:

- that promotional investment made by Tourisme Québec will remain at its current level; however, investment outlay could be altered to take advantage of promising opportunities;
- continuing partnership between Tourisme Québec and industry.

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

These markets are: Québec, Ontario, and New England (United States).

On the bordering markets of Ontario and New England, Tourisme Québec and its partners promote the whole range of tourist experiences.

	QUÉBEC	ONTARIO	UNITED STATES NEW ENGLAND
Urban tourism (summer-fall)		X	X
• City-jabouts		X	X
Urban tourism (winter)		X	X
Tours	X	X	X
• Theme tours		X	X
• Bicycle tourism	X	X	X
Resort tourism	X	X	X
• Health tourism	X	X	X
• Golf		X	X
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 that offer the best development potential over the short term. This means that:

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

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

The markets are:

- *Level 1: Atlantic Centre (United States) and France;*
- *Level 2: Midwestern (United States), United Kingdom and Germany;*
- *Level 3: Southern and Western (United States), Italy, Japan and Mexico.*

Tourism experiences promoted to these markets are listed in the following table.

	UNITED STATES: ATLANTIC CENTRE	UNITED STATES: MIDWEST, SOUTH, WEST	FRANCE	GER- MANY	UNITED KINGDOM	ITALY	JAPAN	MEXICO
Urban tourism (summer -fall)	X	X	X		X		X	X
• City jaunts	X		X		X			
Urban tourism (winter)	X	X	X					
Tours	X	X	X	X	X	X	X	X
• Theme tours	X							
• Aboriginal tourism			X	X		X		
• Bicycle tourism	X							
Resort tourism	X				X		X	
• Health tourism	X							
• Golf	X							
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 where development potential must be assessed. It denotes:

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

The markets are: Belgium and, to a lesser degree, Switzerland, The Netherlands and Scandinavia.

On these emergent markets, the lead-in product is, without doubt, tours, where promotion of complete or partially organized (FIT or Foreign Individual Traveller) tours is supported by a close partnership between Tourisme Québec and wholesalers of foreign travel.

	BELGIUM, SWITZERLAND, THE NETHERLANDS, SCANDINAVIA
Tours	X
• Aboriginal tourism	X
Outdoor adventure	X

2.2 MEETINGS, CONVENTIONS AND INCENTIVE TRAVEL – MCIT – PRIORITY MARKETS

MCIT represents the following client segments:

- corporate meeting clientele
- convention clientele
- incentive travel clientele.
- The performance of convention and corporate meeting clientele depends first and foremost on the state of the economy and the strength of economic relations between Québec and other countries. This holds particularly true for corporate meetings.
- These variables also affect meetings/conventions and incentive travel; however, their performance is quite strongly influenced by promotional activity.

The following are considered when targeting priority MCIT markets:

- countries with close economic ties to Québec;
- countries with economic activity sectors closely linked to Quebec's most dynamic fields (for example: biotechnology, pharmaceuticals, aeronautics, finance, insurance, high technology, automobiles, agri-food);
- areas or cities in the United States where association and corporate headquarters are located.

Key strategies and product promotion vary according to markets.

The American Market

- MCIT growth from the United States is at a much faster pace than that of leisure tourism. The growth rate averages 5% per year. After registering a decrease (6.7%) in 1999, growth resumed in 2000 (3.7%).
- This is primarily a corporate market however, meeting/convention clientele nonetheless generated close to 38% of revenue in 2000.
- The economic area of American corporate and meeting/convention travelers is much greater than that of leisure tourism. Even though the Atlantic Centre (30%) dominates corporate and meeting/convention travel, the more distant regions of the South (22%), the Midwest (20%) and the West (10%) still provided significant contributions.

Other International Markets

- The clientele from other countries is more of a convention clientele (56%) than a corporate clientele (44%).
- In 2000, close to half (48%) of the clientele was European.
- In 2000, the Asian market represented more than one-third of corporate and convention travel (34%), and also experienced the greatest growth over the last years.

Key Strategies	Priority Products	Priority Market
Investment	Corporate meetings and incentive travel	Priority 1: Canada United States (New York, Chicago and Los Angeles) Priority 2: United States (Boston, Atlanta, Dallas and Houston)
Canvassing-Prospecting	Incentive travel	Priority 1: France Priority 2: United Kingdom Priority 3: Germany, Italy

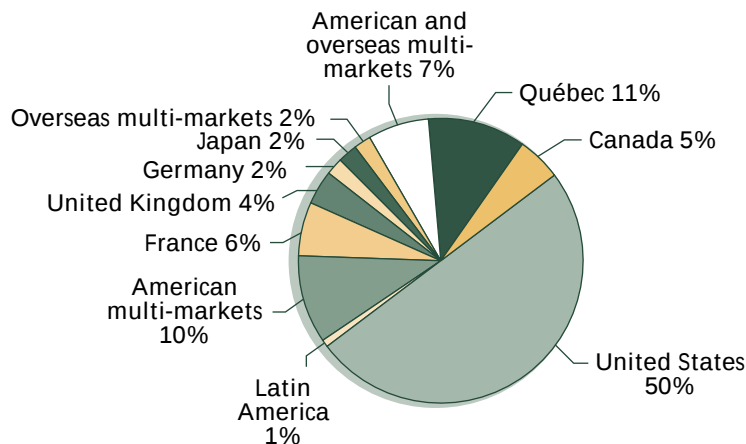
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Budget per market

In 2002-2003, promotional investment by Tourisme Québec for positioning and marketing Québec will reach the sum of \$33.7 million; a decrease of 9% over the previous year.

The main markets targeted by these promotional efforts in order of importance are: the United States (50%), Québec (11%), France (6%), Canada (5%), the United Kingdom (4%) and Germany (2%). The budget for multi-market activities, including the Americas and overseas markets, is 19% of Québec's overall positioning and marketing budget.

***Distribution of Québec's Positioning and Marketing Budget
by Market (\$33.7 million)***



Positioning and Marketing Budget by Territory

American Market

	United States										Americas Multi- markets	Total Americas Markets
	Québec	Canada	New England	Atlantic Centre	Midwest	South	West	National	Total	Latin America		
Advertising and promotion	2 911,9	915,0	67,5		32,0	6,4		13 706,0	13 811,9	140,0		17 778,8
Marketing*		272,5	84,9	282,0	369,3	177,8	133,2	31,0	1 078,2	45,0	393,1	1 756,8
Press relations	125,0	65,0	20,0	17,9	32,0	40,0	66,9		176,8	142,1	293,6	802,5
Canvassing		495,2		700,9	342,7	252,0	345,8		1 641,4			2 136,6
Telemarketing											240,0	240,0
Local partners	238,0											238,0
External partners		80,0					190,2	190,2			165,0	435,2
Market committee	440,0										2 100,0	2 540,0
Web marketing												
Promotional publications												
TOTAL	3 714,9	1 827,7	172,4	1 000,8	744,0	476,2	545,9	13 927,2	16 866,5	327,1	3 191,7	25 927,9
%	11,03	5,43	0,51	2,98	2,21	1,41	1,62	41,37	50,10	0,97	9,50	77,02

Overseas Markets

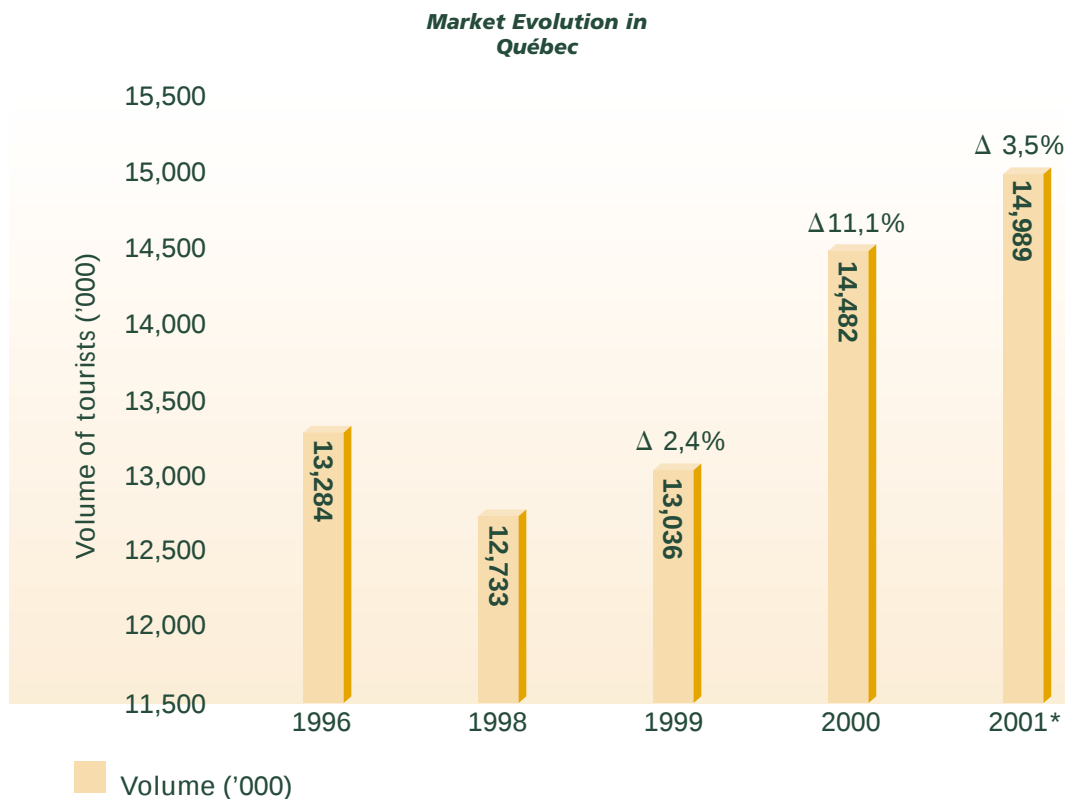
	France	United Kingdom	Germany	Italy-Spain	Japan	Oceania	Asia (others)	Overseas multi-markets	Total Overseas markets	Multi-markets (Americas and overseas)	BUDGET TOTAL
Advertising and promotion	978,5	259,0	42,6	5,0	71,4		5,0		1 361,5		19 140,3
Marketing*	116,5	141,0	105,2	20,0	27,0			90,0	499,7		2 256,5
Press relations	100,0	100,0	147,2	10,0	51,6	5,0	10,0	15,0	438,8		1 241,3
Canvassing	894,6	732,1	426,9		346,3				2 399,9		4 536,5
Telemarketing											240,0
Local partners											238,0
External partners	65,0	73,7	58,5	45,0					242,2		677,4
Market committee								380,0	380,0		2 920,0
Web marketing										1 215,0	1 215,0
Promotional publications										1 200,0	1 200,0
TOTAL	2 154,6	1 305,8	780,4	80,0	496,3	5,0	15,0	485,0	5 322,1	2 415,0	33 665,0
%	6,40	3,89	2,32	0,24		1,53		1,44	15,81	7,17	100,00

* Marketplaces, seminars, consumer trade shows, receptions and familiarization tours.

4 Markets: Strategies and Operating Budgets

Each target market has its own profile. The following provides an overview of the situation, strategies and action priorities as well as the marketing budgets and program activities aimed at improving results for each of the targeted markets.

4.1 QUÉBEC MARKET



Source: Statistics Canada, *Canadian Travel Survey*

Δ: Annual percentage change

2001*: Tourisme Québec forecast based upon reports from Revenue Canada on the number of border crossing per province, ISSN 1492-4285, November 2001.

Main Tourist Market

- The Québec market has traditionally been at the forefront of the Québec tourism industry, particularly in the tourism regions other than Montréal and Québec.
- From 1996 to 2001, the volume of Québec tourists as well as tourism revenue from Quebecers increased by 12.8% and 57.9%, respectively.
- In 2001, 70% of Québec's tourist travel and 44% of tourism revenue was derived from Quebecers. The volume of trips by Quebecers in Québec increased by 3.5% last year, while tourism revenue increased by 8%.

Strategies and Action Priorities for 2002-2003

Positioning

Holidays in Québec are a source of great satisfaction because of the many available activities. The objective is to make Québec a destination of choice. Increasing the appetite of Quebecers for travel within their province will stimulate demand.

Target Markets

- Montréal (French, English) and Québec

Target Clientele

- 25-54 year-olds

Theme

- Cet été et hiver, je me réserve le Québec
- Québec, it's just perfect

Marketing Strategy

Advertising

- Four televised advertisements (two in French, two in English), during the summer and winter.
- Maintenance of the joint promotion with Ultramar.

Press Relations

- Maintain close and personalized ties with tourism journalists.
- Continue the bi-weekly and the four quarterly information bulletins.
- Organize group and individual tours for the written and electronic press.
- Participate in the organization of press meetings with regional and industry partners.

2002-2003 Operating Budget for Québec

Category	Budget (,000)	%
Advertising and Promotion	2 911,9	78,38
<i>Advertising - Québec</i>	<i>2 911,9</i>	
Press Relations	125,0	3,37
Cooperative Promotion Program	678,0	18,25
<i>Québec Partners</i>	<i>238,0</i>	
<i>Market Committee - Intra-Québec</i>	<i>440,0</i>	
Total Québec	3 714,9	100,00

Activities Scheduled in Quebec for 2002-2003

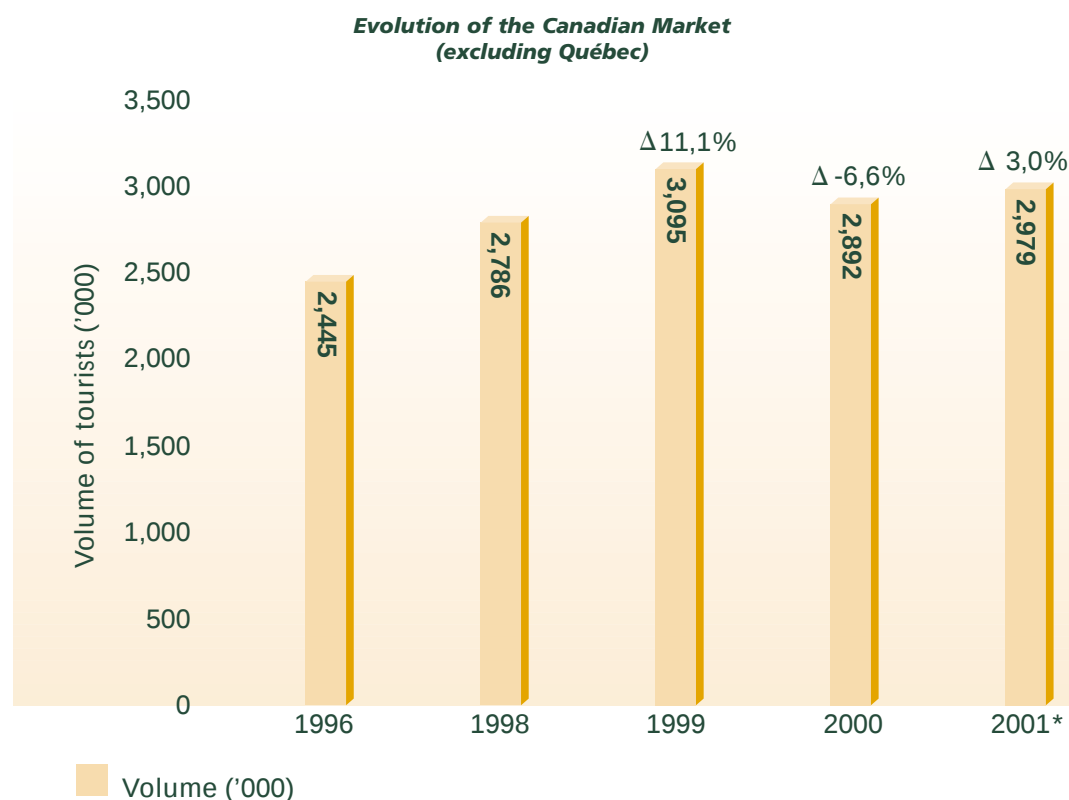
Activity	City	Product	Date
<i>Advertising - Québec</i>			
Advertising - Québec		Nothing specific	02-04-01
<i>Press Relations</i>			
Basin de nature en Outaouais		Multi-product	02-05-29
Québec media marketplace	Montréal, QC	Multi-product	02-04-12
Flaveur in the Îles-de-la-Madeleine	Îles-de-la-Madeleine, QC	Multi-product	02-05-03
Floralies	Québec, QC	Multi-product	02-04-11
Partis pour l'été		Multi-product	02-06-09
Richard Saindon		Multi-product	02-06-03
Sylvie Ruel in the Lower St. Lawrence and at Manicouagan	Lower Saint-Lawrence and Manicouagan (QC)	Multi-product	02-05-17
Sophie Malavoie's press tour		Multi-product	02-06-01
Françoise Kayler's trip		Multi-product	02-06-03
Gil Thériault's trip		Multi-product	02-06-05
<i>PPC - Intra-Québec Market Committee</i>			
Various Projects	Various cities	Multi-product	02-04-01
Festivals and Events in Québec		Nothing specific	02-04-01
Hilton Lac Leamy		Nothing specific	02-04-01
Tourisme Montréal		Nothing specific	02-04-01
<i>PPC - Québec Partners</i>			
Association des bureaux et congrès de Québec (ABCQ)		Multi-product	02-04-01
Aventures Arctiques		Multi-product	02-04-01
Canadian Golf Tourism Alliance		Multi-product	02-04-01
Carte blanche / Ski Québec	Charlevoix, QC	Nothing specific	02-04-01
Horizon Nature Adventure		Multi-product	02-04-01
Hôtellerie Champêtre		Multi-product	02-04-01
Le Québec Maritime		Multi-product	02-04-01
Quebec Adventures LTD		Multi-product	02-04-01
Route du Sud		Multi-product	02-04-01
Voyages Tours Étudiants		Multi-product	02-04-01

4.2 NORTH AMERICAN MARKET

4.2.1 Canada

A Pre-disposed Clientele Mainly from Ontario

- Québec is close to Ontario, the province which is its main source of tourists from the rest of Canada.
- In fact, Ontarians are the Canadians who visit Québec the most. Regarding Quebecers, Ontarians have a relatively good knowledge of traditional Québec products and they are loyal to the destination.
- In 2001, Canadian travelers accounted for 14% of the volume of tourists in Québec and for approximately 16% of tourism revenue.
- From 1996 to 2001, the volume of Canadian tourists in Québec experienced a growth of 21.8%, while tourism revenue increased by 73%.
- The Canadian market, which declined in 2000, improved in 2001, with an increase in the volume of tourists of 3% and an increase in tourism revenue of 6% over the last year.



Source: Statistics Canada, *Canadian Travel Survey*

Δ: Annual Percentage Change

2001*: Tourisme Québec forecast based upon reports from Revenue Canada on the number of border crossing per province, ISSN 1492-4285, November 2001.

Strategies and Action Priorities for 2002-2003

The marketing strategy for the Canadian market is the same as for the American market, as the North American promotional campaign targets both markets. Certain action priorities, more specific to the Canadian market, are mentioned in the list of planned activities for this particular market.

Like Québec and New England, Ontario is recognized as a market to secure the loyalty of, and to renew.

Positioning

The Tourisme Québec summer campaign will position Québec as a unique and intriguing summer tourist destination, offering a panoply of popular tourism experiences.

- It will promote the following tourism experiences:
 - urban tourism
 - tours
 - resort tourism
 - outdoor adventure
- It targets consumers who show an interest in these types of experiences.
- With respect to the MCIT market, Tourisme Québec will support the activities of the Tourism Bureaus of Montréal and Québec.

Target Market

- Metro Toronto

Target Clientele

- 35-54 year-olds
- Family income exceeding CAN \$75 000
- Tour operators
- Travel agents
- Automobile associations

Theme

- Promotional means on the BonjourQuebec.com website and the toll-free 1-877 number.

Marketing Strategies

Advertising

- Tourism Quebec's and its partners leisure travel campaign is two-phased:
 - summer / fall: releases from May to September 2002
 - winter: releases from October 2002 to March 2003.

- The communications media used will be the following:
 - brochures;
 - consumer magazines;
 - industry magazines;
 - daily newspapers;
 - television;
 - facsimiles to industry professionals;
 - direct marketing;
 - tourism information mailings;
 - Internet.
- As a rough guide, the following is a summary of the communications tools used by Tourisme Québec and its partners for the 2002 summer phase.
 - Completion of two mail out brochures entitled *Cities, Excursions and Resorts (Villes, escapades et villégiature)* and *Great Outdoors (Plein air)* (535 000 copies);
 - Facsimile mailing to industry professionals: monthly facsimile mailings about Québec to travel agents and automobile associations, as well as to travel wholesalers and tourism journalists;
 - Direct marketing: distribution of the *Great Outdoors (Plein air)* brochure to 2 000 previous requests for information about Québec and 25 000 copies of the campaign brochure entitled *Cities, Excursions and Resorts (Villes, escapades et villégiature)* to requests for information from Ontario and Metro Toronto;
 - Mailings of tourism information: distribution of brochures to people who request them from Tourisme Québec and its partners;
 - Promotion of participating partners on Tourisme Québec's Internet site and the purchase of advertising banners on Internet sites.
- For the 2002-2003 winter leisure travel campaign, Tourisme Québec will table a proposal in the form of a partnership with groups responsible for promoting this product, outlined as follows:
 - *Sports d'hiver, villégiature et séjour urbain*: a brochure on package deals will be distributed in response to requests for information as well as during promotions.
 - a variety of communications tools will complement this program (print advertising, television, mailings, promotion of participating partners on the website).
- Meetings, conventions, incentive travel and leisure travel:
 - work in close cooperation on the association market with Tourisme Montréal, the Office du tourisme et des congrès de la Communauté urbaine de Québec and convention centres.
 - work on attracting new clienteles for these segments.

Press Relations

- Organize press meetings in Toronto.
- Organize and coordinate individual and group tours for the print and electronic press.
- Maintain close ties with tourism media and journalists.
- Participate in annual and monthly meetings of the various journalistic associations (Canadian Chapter of the Society of American Travel Writers, Travel Media Association of Canada, etc.).
- Publish an information bulletin twice yearly (Quebec Trip Talk).

Distribution Network

- Approach tour operators likely to offer innovative travel packages on Québec.
- Intensify promotional efforts with high potential clients and explore new windows of opportunity with seniors.
- Work closely with the CAA and bus management companies.
- Continue to support wholesalers, particularly for skiing.
- Undertake a large-scale telemarketing campaign targeted to meeting, convention and incentive travel clientele.

2002-2003 Operating Budget for Canada (excluding Québec)

Category	Budget (,000)	%
Advertising and Promotion	915,0	50,06
<i>Advertising - Canada</i>	<i>915,0</i>	
Marketing	272,5	14,91
<i>Marketplaces</i>	<i>6,5</i>	
<i>Seminars</i>	<i>3,8</i>	
<i>Consumer trade shows</i>	<i>32,0</i>	
<i>Receptions</i>	<i>230,2</i>	
Press Relations	65,0	3,56
Canvassing	495,2	27,09
Cooperative Promotion Program	80,0	4,38
<i>External partners</i>	<i>80,0</i>	
Total Canada	1 827,7	100,00

Activities Scheduled in Canada (excluding Québec)

Activities	City	Product	Date
Advertising - Canada			
Advertising Canada - Summer and Winter Campaigns		Nothing specific	02-04-01
Grants			
ACTA	Halifax, NE	Multi-product	02-11-01
CSAE - Annual Conference & Marketplace	Hull, QC	MC IT	02-07-27
Executive Travel Show	Vancouver, BC	MC IT	02-10-01
Motivation Show / Incentive Trade Show	Chicago, IL	MC IT	02-10-01
Seminars			
Impac - Annual Conference & Marketplace		MC IT	02-11-01
MPI - PEC	Orlando, FL	MC IT	03-01-01
MPI - WEC	Toronto, ON	MC IT	02-07-20
Consumers Trade Shows			
Glamer Show (50 Plus lifestyle & travel show)	Toronto, ON	Multi-product	02-05-03
Outdoor Show	Toronto, ON	Adventure	03-02-01
Ottawa Golf & Travel Show (report 2001-2002)	Ottawa, ON	Golf	02-03-15
The Supertrax international Snowmobile's Show	Toronto, ON	Snowmobiling	02-10-18
The Travel & Leisure Show	Toronto, ON	Multi-product	02-04-18
The Travel & Vacation Show	Ottawa, ON	Multi-product	02-04-26
Receptions			
Annual Quebec Cup Golf Tournament	Toronto, ON	MC IT	02-06-03
Monthly Lunch Meetings - PATA / ANTOR / SATW / MPI / SITES / CSAE / TMAC	Toronto, ON	Multi-product	
Discover Quebec	Vancouver, BC	Multi-product	02-12-01
Le Québec Maritime - Tourisme Québec	Toronto, ON	Multi-product	02-05-01
Mini-Quebec Day	Ottawa, ON	MC IT	02-04-01
Meeting & Incentive Canadian trade Show	Toronto, ON	MC IT	02-08-26
Mountain Travel Symposium		Multi-product	02-04-01
MPI 2002	Toronto, ON	Multi-product	02-07-23
MPI Awards	Toronto, ON	MC IT	03-03-01
MPI - NEC 2003 Trade Show	Toronto, ON	MC IT	02-04-25
MPI Toronto - Summer Event	Toronto, ON	MC IT	02-06-26
O.M.C.A.	Toronto, ON	Tours	02-11-01
Promotion with Montréal, Québec and Via Rail	Toronto, ON	Multi-product	02-05-01
Quebec Day	Toronto, ON	MC IT	03-02-01
Quebec Winter Wonderland	Toronto, ON	Nothing specific	02-10-01
SITE	Toronto, ON	MC IT	02-08-01
Toronto Ski Show	Toronto, ON	Skiing	02-10-17

Press Relations

Press Clippings (Bowden's)		Multi-product	02-04-01
Press Luncheons	Diverses villes	Multi-product	02-04-01
Golf & Spa Media Tours - June 2002	Estrie, QC	Golf	02-06-17
Maureen Littlejohn Press Tour	Estrie, QC	Multi-product	02-05-24
Montréal Media Luncheon	Toronto, ON	Multi-product	02-06-06
North America Snow Sports Journalist Association	Charlevoix, QC	Skiing	02-04-01
Group Media Tours		Multi-product	02-04-01
Individual Media Tours		Multi-product	02-04-01
SATW Annual Convention & Media Marketplace	Honolulu, HI	Multi-product	02-10-27
SATW Associates Council - Annual Meeting & Media		Multi-product	02-04-01
SATW Canadian Chapter Annual Meeting	Kelowna, BC	Multi-product	02-05-10
Snow Trax Television	Anticosti, QC	Multi-product	02-01-19
TMAC Annual Meeting & Media Trade Show		Multi-product	02-04-01

PPC - External Partners

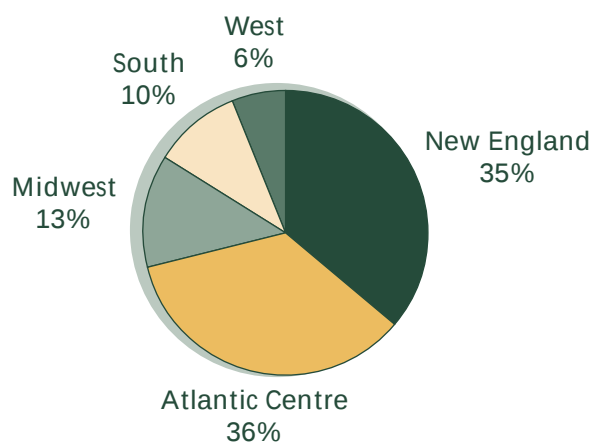
Gotta Travel Tours		Nothing specific	02-04-01
Ski Can		Nothing specific	02-04-01
Ultimate Golf Vacations	Canada	Multi-product	02-04-01

4.2.2 United States

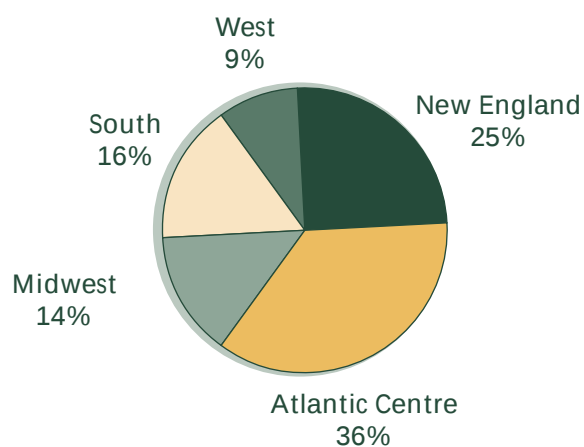
A Sizable Market Accounting for Close to a Quarter of All Tourism Revenue

- In 2001, American tourists accounted for 11% of all tourists and 23% of total tourism revenue in Québec.
- From 1996 to 2001, the increase in the volume of tourists recorded for the American market was 21.3% and 48.4% for tourism revenue.
- Despite the economic slowdown and the events of September 11th, the volume of American tourists increased 3.1% in 2001. The increase exceeded the result of 2.7% recorded for 2000.
- In 2001, tourism revenue increased 10.4%. This progression was greater than in 2000 (+ 6.1%).

Origin of the 2.33 million American tourists in 2001



Source of the \$1.266 million in American tourism revenue in 2001



Source: Statistics Canada, *International Travel Survey*



Source: Statistics Canada, *International Travel Survey*
Δ Annual percentage change

Strategies and Action Priorities for 2002-2003

Positioning

Tourisme Québec's summer advertising presents Québec as a unique and intriguing summer tourist destination offering a wide range of popular tourist experiences.

The advertising campaign promotes the following tourist experiences:

- urban tourism
- tours
- resort tourism
- outdoor adventure

Once again, emphasis is placed on the exchange rate, much to the advantage of Americans, who benefit from the very best quality-price ratio in North America.

In the case of meetings, conventions and incentive travel (MCIT), Tourisme Québec will support the activities of the tourism bureaus in Montréal and Québec City.

Target Markets

- Securing and maintaining loyalty: New England (Boston)
- Level 1 investment: Atlantic Centre (New York, Philadelphia and New Jersey)
- Level 2 investment: Midwest
- Level 3 investment: South and West

Target Clienteles

Markets	Consumers	Industry
Securing and maintaining loyalty Level 1 investment	Ages 35-54 Family revenue greater than US \$75 000 and inclined to travel Having previously travelled outside the United States	Tour operators Travel agents Automobile clubs
Level 2 and 3 investment	Ages 55 and older Family revenue greater than US \$75 000 and inclined to travel Having previously travelled outside the United States	Travel agents Automobile clubs

Theme

Promotional means on the BonjourQuebec.com website and the toll-free 1-877 number.

Marketing Strategy**Advertising**

- The advertising campaign sponsored by Tourisme Québec and its partners covers two periods:
 - summer / fall: releases from May to September 2002
 - winter: releases from October 2002 to March 2003
- Communication media include:
 - brochures;
 - consumer magazines;
 - industry magazines;
 - daily newspapers;
 - television;
 - facsimiles to industry professionals;
 - direct marketing;
 - tourist information mailings;
 - Internet.

- The following summarizes the communication media used by Tourisme Québec and its partners in the 2002 summer advertising campaign.
 - Publication of two countryside campaign brochures *Cities, Excursions and Resorts (Villes, escapades et villégiature)* and the *Great Outdoors (Plein air)* (535 000 copies);
 - Distribution of a 12-page insert in targeted daily newspapers in partnership with the Société des Casinos du Québec (nearly 1 057 500 copies);
 - Advertisements in large daily newspapers in Boston, New York, Philadelphia and New Jersey (total run: 5 359 200) in partnership with the Société des Casinos du Québec;
 - Publicity on regular TV channels and specialized channels (travel or information) broadcasting in the New York/Newark/Philadelphia areas;
 - Broadcasting of messages concerning specific products and infomercials on some American TV networks;
 - Facsimiles to industry professionals: monthly faxing of information on Québec to more than 2 000 travel agents and automobile clubs, as well as to 8 000 travel wholesalers and tourism reporters;
 - Direct marketing: sending of the *Great Outdoors* brochure to 8 000 people who formerly requested information on Québec and 225 000 copies of *Cities, Excursions and Resorts* to people requesting information in northern New York and New England;
 - Tourist information mailings: forwarding brochures to people requesting information from Tourisme Québec and its partners;
 - Promotion of participating partners on the Tourisme Québec website and purchase of advertising banners on other websites.
- For the 2002-2003 winter advertising campaign, Tourisme Québec will table a proposal in the form of a partnership with groups responsible for promoting this product. The main themes will be:
 - *Sports d'hiver, villégiature et séjour urbain*: a brochure featuring package deals will be distributed in response to requests for information as well as during promotions.
 - a variety of communication tools will complement this program (print advertising, television, mailings, promotion of participating partners on the website).
- Meetings, conventions, incentive travel (MCIT) and leisure travel:
 - Continue to update the Tourisme Québec's database in meetings, conventions, incentive travel and leisure travel for our team of canvassers in the United States.
 - Work in close cooperation with Tourisme Montréal, Office du tourisme et des congrès de la Communauté urbaine de Québec and convention centres on the association market.
 - Seek new clientele for these market segments.

Press Relations

- Maintain close contact and encourage new contacts with regional, national and specialty press.
- Participate regularly in press meetings, particularly those organized by Air Canada in San Francisco, Chicago and Boston.
- Maintain close relations with Air Canada.
- Attend monthly and annual meetings of various reporters' 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*.
- Coordinate individual and group press tours of various regions of Québec, based on positioning priorities.
- Organize tours for the more important hunting and fishing magazines.
- Participate technically and financially in a gay and lesbian press tour.

Distribution Network

- Consolidate Tourisme Québec's network of canvassers in the four great American cities of New York, Chicago, Dallas and Los Angeles.

2002-2003 Operating Budget for the United States (National)

Category	Budget (,000)	%
Advertising and Promotion	13 706,0	98,41
<i>Advertising - Americas</i>	<i>13 706,0</i>	
Marketing	31,0	0,22
<i>Marketplaces</i>	<i>31,0</i>	
Cooperative Promotion Campaign	190,2	1,37
<i>External partners</i>	<i>190,2</i>	
Total United States (National)	13 927,2	100,00

Activities Scheduled in the United States (National)

Activities	City	Product	Date
Advertising - Americas			
Miscellaneous / Summer and winter campaigns	Nothing specific	Nothing specific	02-04-01
CanadaScope / advertisement	Nothing specific	Multi-product	02-04-01
Marketplaces			
ABA / Annual Convention and Travel Exchange	Kissimmee St-Cloud, FL	Multi-product	03-01-01
Learning Travel Alliance		Multi-product	02-04-01
Non-profit in Travel Conference	Washington, DC	Multi-product	03-02-01
NTA / Annual Convention and Travel Exchange	Houston, TX	Multi-product	02-11-01
Team Canada (NTA / ABA)		Multi-product	
TIA Annual Convention	Ft Lauderdale, FL	Multi-product	02-09-01
TIAC Annual Conference	Charlottetown, PE	Multi-product	02-10-01
USTOA	Whistler, BC	Multi-product	02-12-01
Receptions			
Bienvenue Québec 2002 - Salesperson's breakfast	Pointe-au-Pic, QC	Multi-product	02-10-22
Familiarization Tours			
Bienvenue Québec 2002	Pointe-au-Pic, QC	Multi-product	02-10-18
PPC - External Partners			
AAA - Brennan		Multi-product	02-04-01
AAA - Brennan	Seattle, WA	Multi-product	02-04-01
Air Canada's Canada	Ramsey, NJ	Multi-product	02-04-01
Collette Vacations / Discover Canada	Pawtucket, RI	Multi-product	02-04-01
Globus & Cosmos	Littleton, CO	Multi-product	02-04-01
Heritage Peer Groups		Multi-product	
Montréal Vacations	Medford, MA	Multi-product	02-04-01
Maupintours	Lawrence, KS	Multi-product	02-04-01
Tauck World Discovery	Westport, CT	Multi-product	02-04-01
United Airlines Vacations / Mark Travel	Milwaukee, WI	Multi-product	02-04-01
Yankee Holidays	Beverly, MA	Multi-product	02-04-01

NEW ENGLAND

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

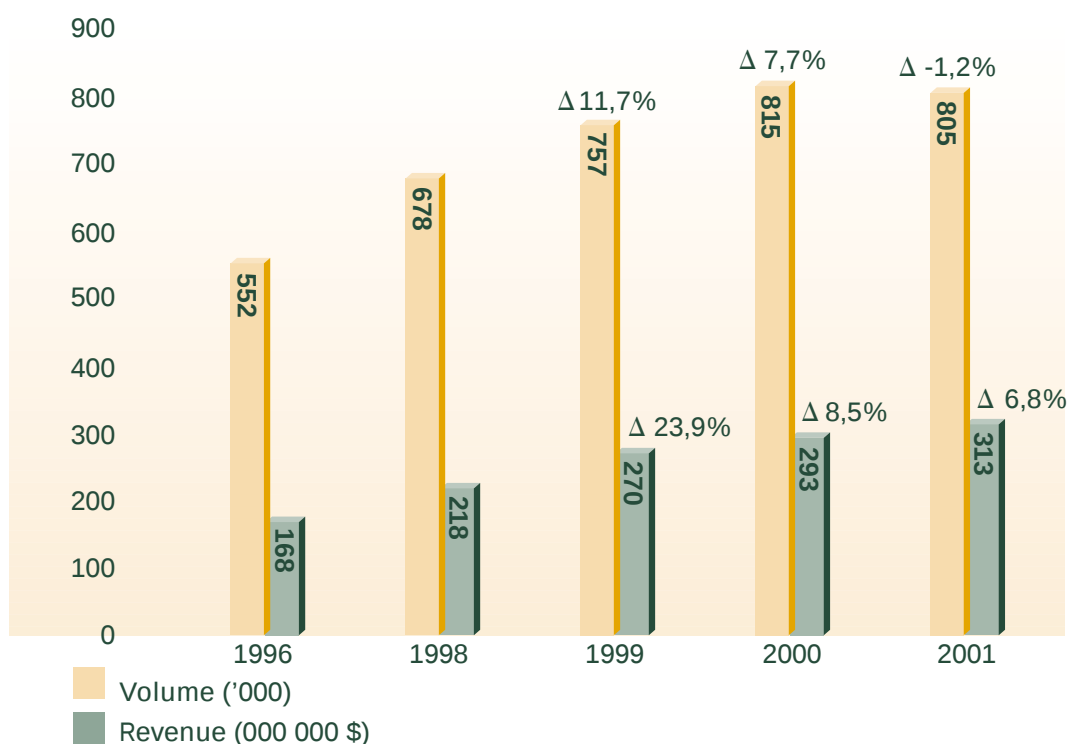
New England is considered a mature market; Québec must secure and maintain its loyalty. The new region of New England to be solicited encompasses clientèles already familiar with Québec as a tourist destination. However, these clientèles must be made aware of the diversity of the tourist product available in Québec in order to renew their interest in Québec.

- The New England sub-market has potentially the highest volume of visitors to Québec. It is the only region in the U.S. where more tourists visit Québec than Ontario.
- In 2001, this market accounted for 35% of the volume of American tourists visiting Québec and 25% of tourism revenue from the American market.

However, with 10.6 million inhabitants, this region is the least populated in terms of canvassing potential.

- In 2001, this market accounted for 3.8% of tourists and 5.7% of total tourism revenue in Québec.
- This traditional market in Québec has experienced sustained growth from 1996 to 2001, with the volume of tourists increasing by 45.8% and tourism revenue increasing by 86.3%.
- However, like many markets, the volume of tourists from New England decreased by 1.2% in 2001. Note, however, that revenue increased 6.8%, or a little less than two percentage points compared to the year 2000.

**Evolution of the New England –
United States Market**



Source: Statistics Canada, *International Travel Survey*
 Δ: Annual percentage change

Strategies and Action Priorities for 2002-2003

- Intensify contacts with tour operators.
- Maintain the more profitable trade missions.
- Increase the number of activities targeting consumers.
- Contact and follow-up on opportunities concerning trade tourism inventoried in 2001.

2002-2003 Operating Budget for New England

Category	Budget (,000)	%
Advertising and Promotion	67,5	39,15
<i>Advertising - Americas</i>	33,3	
<i>Consumer advertising</i>	34,2	
Marketing	84,9	49,25
<i>Marketplaces</i>	3,5	
<i>Consumer trade shows</i>	26,4	
<i>Receptions</i>	51,0	
<i>Familiarization tours</i>	4,0	
Press Relations	20,0	11,60
Total	172,4	100,00
New England (United States)		

Activities Scheduled in New England

Activities	City	Product	Date
Advertising - Americas			
Clear channel	Vermont, New Hampshire	Multi-product	02-04-01
Parks insert in AMC magazine	Vermont	Multi-product	02-04-01
WCVT promotion		Multi-product	02-04-01
Appalachian Mountain Club (AMC) magazine	Adventure		02-04-01
Consumer Advertising			
Business activities		Multi-product	02-04-01
AMC national promotion	Boston, MA	Adventure	03-02-01
Bienvenue Québec	Charlevoix, QC	Multi-product	02-10-12
Champlain Valley Exposition	Burlington, VT	Multi-product	02-09-01
MAPAQ promotion and Delegation from Québec - Boston	Boston, MA	Urban tourism	02-09-01
Marketplaces			
Bienvenue Québec		Multi-product	02-10-01
Nemice	Boston, MA	MC IT	02-04-04
Showcase Canada		MC IT	
Consumer Trade Shows			
AAA Southern NE 2002 Auto Travel	Providence, Worcester and Dedham (MA)	Multi-product	03-03-01
AAA Southern NE 2002 Auto Travel	Providence, Worcester and Dedham (MA)	Multi-product	03-03-19
Boston Snow Sports Expo	Boston, MA	Skiing	02-11-01
Consumer Information Kiosk	Portland, ME	Multi-product	02-05-10
Consumer Kiosk	New Hampshire, Mall TBA	Multi-product	02-04-05
Eastern States Expo	West Springfield, MA	Multi-product	02-09-01
Golf	Boston, MA	Golf	
ITOL trade mission	ME, MA, NY and VT	Multi-product	02-04-02
Snowmobiles	New Hampshire	Snowmobiling	
Travel Experience	Lincoln Park, RI	Multi-product	02-10-29
Travel Night	Vermont	Multi-product	02-11-01

Receptions			
Quebec Day / Cirque du Soleil	Boston, MA	MC IT	02-08-01
Soirée Laval	Boston, MA	Multi-product	03-03-01
Familiarization Tours			
AAA Southern, NE	Montréal, QC	Urban tourism	
Press Relations			
Air Canada Dinner in Boston	Boston, MA	Multi-product	02-05-16
Various tours		Multi-product	02-04-01
Magdalen Islands	Québec Maritime, QC	Multi-product	02-07-01
Media meetings in Boston	Boston, MA	Multi-product	02-05-15
Steve Jermanok	Estrie, QC	Multi-product	02-07-11

ATLANTIC CENTRE

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

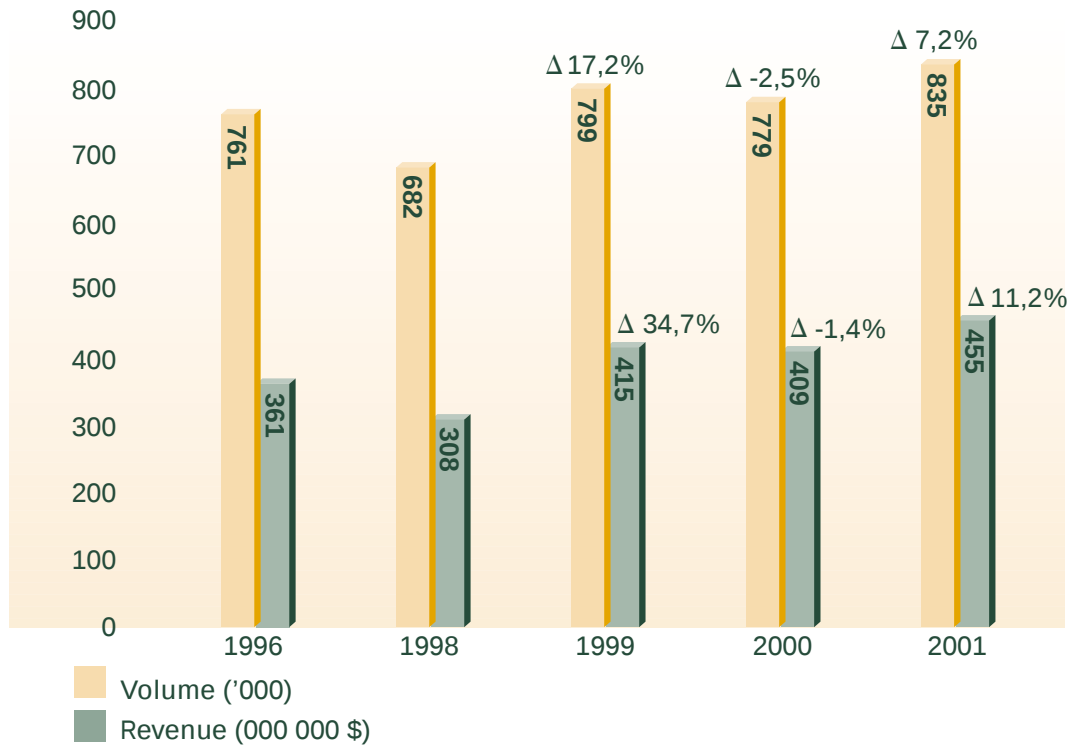
As the American sub-market with the most potential for growth for Québec, Atlantic Centre is categorized as a Level 1 investment in terms of strategy.

- For several years, Atlantic Centre has been the sub-market that has generated the most tourists and tourism revenue.
- In 2001, the sub-market accounted for 36% of the volume of tourists and the same proportion of tourism revenue from the American market.
- The sub-market represented 3.9% of tourists having visited Québec and 8.2% of total Québec tourism revenue.
- This important tourist market has experienced a 10% increase in the number of tourists and a 26% increase in tourism revenue between 1996 and 2001.
- Following the decreases in volume and revenue observed in 2000, this market rebounded strongly in 2001 with increases in both volume (+7.2%) and revenue (+11.2%).

Strategies and Action Priorities for 2002-2003

- Increase the visibility of Québec as a destination among consumers.
- Continue to canvass tour operators and ski clubs.
- Continue to provide information and training to American travel agencies.
- Continue action among new clientele segments (ethnic minorities, horticultural societies, gays and lesbians, golfers, etc.).
- Intensify representation among potential corporate clients in the meetings/conventions and incentive travel (MCIT) sector.

**Evolution of the
Atlantic Centre – United States Market**



Source: Statistics Canada, *International Travel Survey*
 Δ: Annual percentage

2002-2003 Operating Budget for Atlantic Centre

Category	Budget (,000)	%
Marketing	282,0	28,18
<i>Marketplaces</i>	30,2	
<i>Seminars</i>	14,4	
<i>Consumer trade shows</i>	13,4	
<i>Receptions</i>	175,7	
<i>Familiarization tours</i>	48,3	
Press Relations	17,9	1,79
Canvassing	700,9	70,03
Total Atlantic Centre (United States)	1 000,8	100,00

Activities Scheduled in Atlantic Centre

Activities	City	Product	Date
Bourses			
I Love NY Day	New York, NY	MC IT	03-02-01
MPI Education Day	New York, NY	MC IT	02-09-01
MPI PEC	Orlando, FL	MC IT	03-01-01
MPI WEC	Toronto, ON	MC IT	02-07-21
PBA	Harrisburg, PA	Tours	03-03-01
Receptive Service Association	New York, NY	Multi-product	03-02-01
Showcase Canada	Washington, DC	MC IT	03-02-01
Showcase Canada	New York, NY	MC IT	03-02-01
Ski Experts	Newark, White Plains (NJ)	Skiing	02-09-01
Ski Experts	Newark, NJ	Skiing	02-09-23
Ski Expert	Philadelphia, PA	Skiing	02-09-23
Spotlight Canada	Buffalo and Rochester (NY)	Skiing	02-09-01
Spotlight Canada	Buffalo and Rochester (NY)	Skiing	03-03-01
Seminars			
Heritage of Pride	New York, NY	Urban tourism	02-06-30
MPI Local Chapter	Various locations	Urban tourism	02-04-01
Consumer Trade Shows			
Big East Snowmobile Show	Syracuse, NY	Snowmobiling	02-10-01
Connecticut Showsports	Connecticut	Skiing	02-11-01
National Ski Show	Washington, DC	Skiing	02-09-01
Ski and Snowboard Expo	Philadelphia, PA	Skiing	02-10-01
Winter Gateway Travel Show	Albany, NY	Ski	02-11-01
Receptions			
Various receptions	Various locations	Multi-product	03-02-01
Mini Quebec Day - Washington	Washington, DC	MC IT	03-03-01
MPI Chapter Events	NY, NJ, DC, CT	MC IT	02-04-01
Open Night NY Film Festival	New York, NY	MC IT	02-10-01
Hockey games (The Canadians)	New York, NY	Multi-product	02-04-01
Quebec Day	New York, NY	MC IT	03-02-01
Quebec performers	Various locations	Multi-product	02-04-01
Tour Operators and Receptives	New York, NY	Multi-product	02-10-01
Travel Expo	Various locations	Urban tourism	02-04-12
US Open - Tennis Tournament	New York, NY	Multi-product	02-09-01
Familiarization Tours			
Various tours		Multi-product	
Winter Products Fam Tour	Various locations	Multi-product	03-02-01

Pres Relations

Various press tours	Various locations	Multi-product	02-04-01
Eastern Ski Writer		Skiing	03-03-01
Jeff Aronson in Montréal	Montréal, QC	Multi-product	02-04-03
Luncheon	New York, NY	Multi-product	02-09-01
Luncheon	Washington, DC	Multi-product	03-03-01
NLGJA		Multi-product	
Trendy Montréal	Montréal, Laurentides and Estrie (QC)	Multi-product	01-09-05
SATW Annual Meeting		Multi-product	01-11-01
SATW Associate Meeting		Multi-product	02-08-01
SATW Atlantic Chapter Meeting	Nassau (Bahamas)	Multi-product	02-06-09

There is no question that American markets in the Midwest, South and West show great promise. These markets have experienced strong economic and demographic growth. Large corporations are moving in the region as are retirees seeking a milder climate. Tourists from these regions prefer to travel by air rather than by car to come to Québec. They stay longer and spend more.

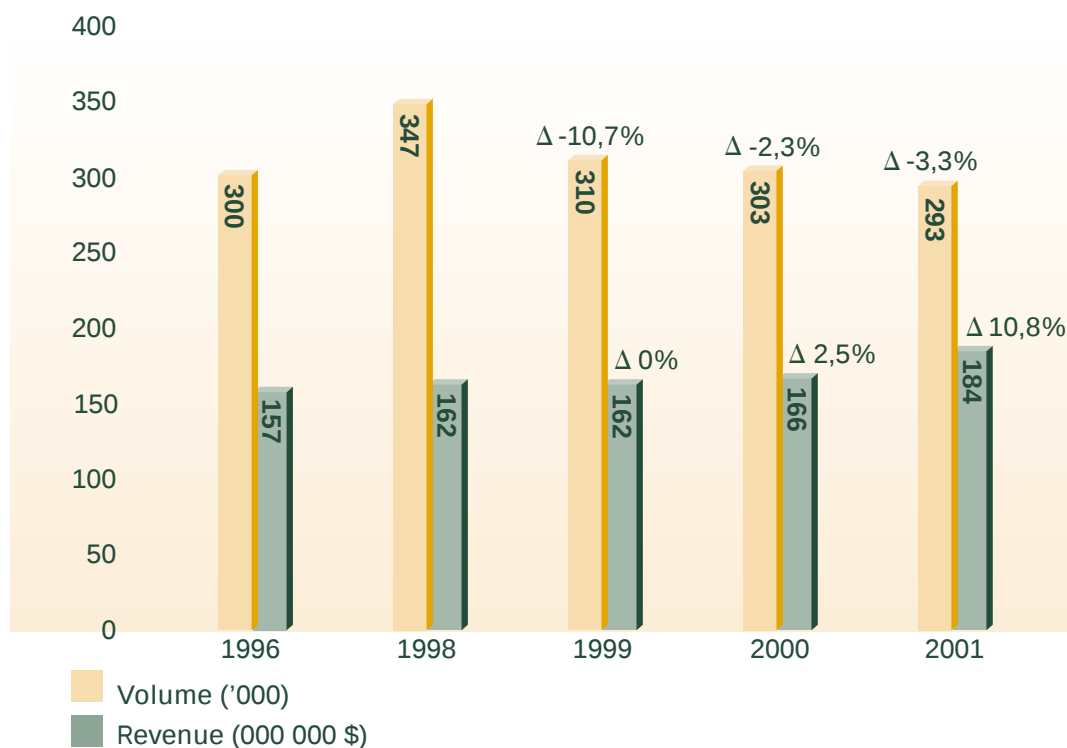
Midwest

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

The Midwest is the third largest sub-market in terms of tourist volume and revenue; the strategy applied to this market will be Level 2 investment.

- This region ranks second in the United States for the number of headquarters of national and international associations. The incentive travel industry is also solidly established in the region.
- In 2001, the region accounted for 13% of all volume and 14% of all tourism revenue originating from the United States.
- It accounted for 1.4% of all volume and 3.3% of total tourism revenue in Québec.
- From 1996 to 2001, the volume of tourists from this region decreased (-2.3%) while tourism revenue increased 17.2%.
- In 2001, the volume of tourists from this region again decreased (-3.3%), resulting in a decline three years in a row. On the other hand, tourism revenue continued to increase in recent years, culminating in a 10.8% last year.

**Evolution of the Midwest –
United States Market**



Source: Statistics Canada, International Travel Survey
 Δ Annual percentage change

Strategies and Action Priorities for 2002-2003

- Promote Québec as a safe, interesting and affordable destination close to the United States.
- Conduct press relations activities and consolidate ties with media.
- Target automobile clubs, group multipliers (skiing, seniors) to bolster leisure tourism.
- Intensify representation activities among distribution networks.
- Encourage distributors to include Québec in their product catalogues.
- Continue telemarketing effort and complete Tourisme Québec's database for the leisure and corporate clientele.
- Intensify representation among potential corporate and incentive travel clientele.

2002-2003 Operating Budget for the Midwest

Category	Budget (,000)	%
Advertising and Promotion	32,0	4,30
<i>Consumer advertising</i>	<i>32,0</i>	
Marketing	337,3	45,34
<i>Marketplaces</i>	<i>156,0</i>	
<i>Seminars</i>	<i>11,7</i>	
<i>Consumer trade shows</i>	<i>20,8</i>	
<i>Receptions</i>	<i>124,8</i>	
<i>Familiarization tours</i>	<i>24,0</i>	
Press Relations	32,0	4,30
Canvassing	342,7	46,06
Total Midwest (United States)	744,0	100,00

Activities Scheduled in the Midwest

Activities	City	Product	Date
Consumer Advertising			
Special events	Territory	Multi-product	
Cross promotion	Territory	Multi-product	
Marketplaces			
ABA National Conference	Indianapolis, IN	Tours	03-02-01
AFC - Holiday Showcase	Chicago, IL	MC IT	02-12-18
American Airlines Light Opera Works Event	Evanston,	Multi-product	02-04-11
American Society of Association Executive	Denver, CO	MC IT	02-08-18
ASTA Mid-American Show	Quad City, LA	Tours	02-06-02
ASTA Travel Expo	Grand Rapids, MI	Tours	02-10-01
ASTA Travel Expo	Milwaukee, WI	Tours	02-11-01
Canada Showcase	Minneapolis, MN	MC IT	02-11-01
Canada Showcase	Chicago, IL	MC IT	03-03-01
Canada Showcase	Detroit, MI	MC IT	03-03-01
Cleveland Plain Dealer	Cleveland, OH	Tours	03-03-01
CTC - PCMA Learning Series	Kansas City, KS	MC IT	02-06-25
Detroit Newspaper Show	Detroit, MI	Tours	02-10-08
Various marketplaces		Multi-product	02-04-01
Glamer	Cincinnati, OH	Tours	02-05-01
Int'l Group Tvl Assoc.	Merrillville, IN	Tours	02-06-02
IT & ME Show	Chicago, IL	MC IT	02-09-24
Meeting Quest	Chicago, IL	MC IT	02-10-24
Meeting Quest	Minneapolis, MN	MC IT	02-10-10
Meeting Quest	St. Louis, MO	MC IT	02-09-12
MPI - PEC	Orlando, FL	MC IT	03-02-02
MPI - WEC	Toronto, ON	MC IT	02-07-20
Ski Expert	Chicago, IL	Skiing	02-09-25
Spotlight Canada 2002	Cleveland, OH	Tours	03-03-01
Spotlight Canada 2002	Detroit, MI	Tours	03-03-01

Seminars			
ASTA & Industry Meetings	Territory	Tours	02-04-01
Chicago Metropolitan Ski Council	Rosemont, IL	Skiing	02-05-18
Trip Seminars			
Detroit Ski Council Travel Round up	Trot, MI	Skiing	02-05-19
Various seminars	Territory	Multi-product	
Ski groups	Detroit, MI	Skiing	02-04-01
Ski groups	Minneapolis, MN	Skiing	02-04-01
MPI, SITE, Industry Meetings	Territory	MC IT	02-04-01
Consumer Trade Shows			
Chicago Ski Show	Chicago, IL	Skiing	02-11-01
Cleveland Ski Show	Cleveland, OH	Skiing	02-05-11
Divers salons		Nothing specific	02-04-01
Gullivers Travel Show	Quad City, IA	Tours	03-01-01
Int'l Adventure Show	Chicago, IL	Adventure	03-02-01
Metro Detroit Ski Council	Detroit, MI	Skiing	02-05-01
Receptions			
Cirque du Soleil / Quebec Day	Denver, CO	Tours	02-06-01
Cirque du Soleil / Quebec Day	Denver, CO	MC IT	02-07-10
Cirque du Soleil / Quebec Day	Detroit, MI	Tours	02-08-01
Cirque du Soleil / Quebec Day	Detroit, MI	MC IT	02-07-17
Cirque du Soleil / Quebec Day	Minneapolis, MN	Tours	02-08-01
Cirque du Soleil / Quebec Day	Minneapolis, MN	MC IT	02-09-10
CTC Canada Events	Territory	Tours	02-04-01
CTC Canada Events	Territory	MC IT	02-04-01
MPI - CAC Golf Classic	Chicago, IL	MC IT	02-06-03
Familiarization Tours			
Cartan Tours	Québec, QC	Multi-product	02-04-11
Various tours	Territory	Tours	
Various tours	Territory	MC IT	
Press Relations			
Air Canada Press Luncheon 2002	Chicago, IL	Multi-product	02-04-11
Cirque du Soleil / Quebec Day	Denver (CO) et Minneapolis (MN)	Multi-product	02-07-10
Media Events & Promotions	Territory	Multi-product	
Media tours	Territory	Multi-product	

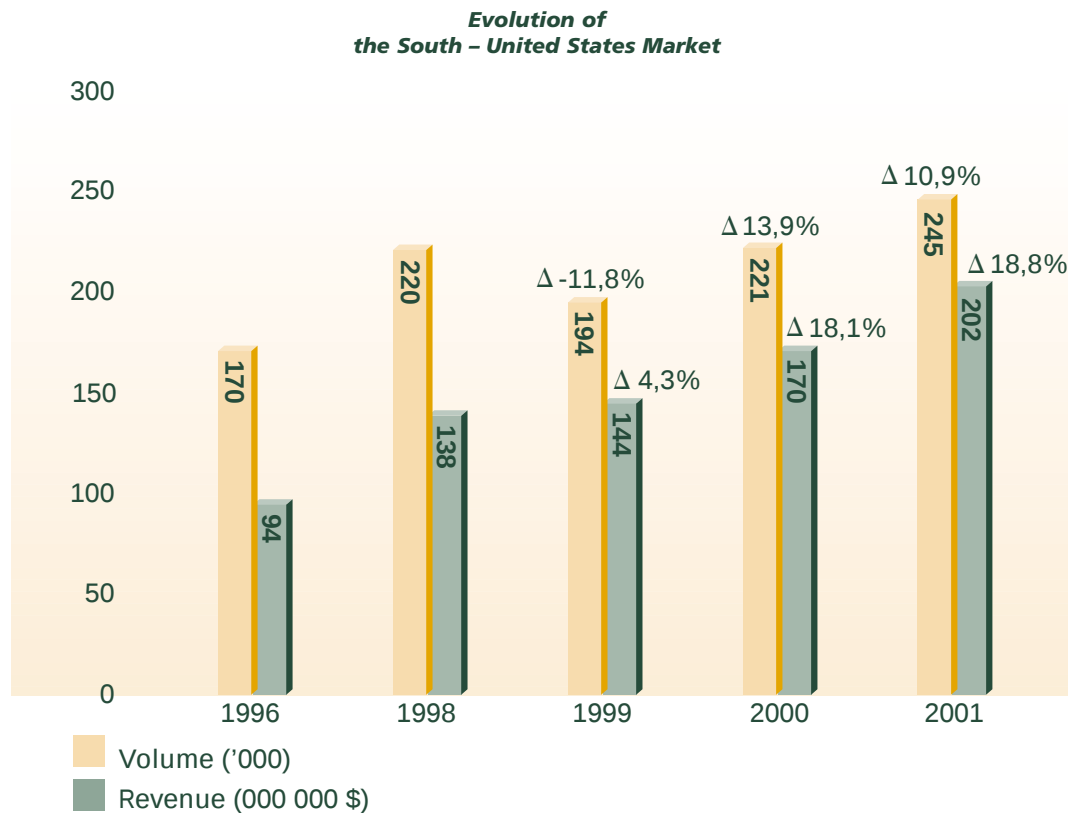
SOUTH

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

The South is a market showing enough promise for development to justify a Level 3 investment.

- In the past two years, the South has been the region in the United States that has experienced the strongest surge in volume of both tourists and tourism revenue.
- In 2001, this market accounted for 10% of all tourists and 16% of tourism revenue from the United States, which represents 1.1% of all tourists and 3.7% of the total tourism revenue recorded in Québec.

- From 1996 to 2001, this market recorded significant increases in numbers of tourists (+44.1%) and tourism revenue (+114.9%)
- Following a major decline in the volume of tourists in 1999, this region rebounded in 2000 (+13.9%), and growth continued in 2001 (+10.9%).
- For a third consecutive year, in 2001 the increase in tourism revenue continued with an increase of 18.8%, quite similar to that of 2000 (+18.1%).



Source: Statistics Canada, *International Travel Survey*
 Δ Annual percentage change

Strategies and Action Priorities for 2002-2003

- Continue working on promotional agreements with tour operators.
- Hold press relations activities.
- Continue to increase the visibility of Québec among distribution networks through multiple representation activities.
- Organize several familiarization tours.
- Continue telemarketing efforts among both leisure and corporate clientele.
- Continue informing and offering training sessions on the destination to travel agents.

2002-2003 Operating Budget for the Southern United States

Category	Budget (,000)	%
Advertising and Promotion	6,4	13,56
<i>Consumer advertising</i>	<i>6,4</i>	
Marketing	177,8	37,34
<i>Marketplaces</i>	<i>62,7</i>	
<i>Seminars</i>	<i>7,2</i>	
<i>Consumer trade shows</i>	<i>6,4</i>	
<i>Receptions</i>	<i>68,7</i>	
<i>Familiarization tours</i>	<i>32,8</i>	
Press Relations	40,0	8,40
Canvassing	252,0	52,92
Total Southern United States	476,2	100,00

Activities Scheduled in the South

Activities	City	Product	Date
<i>Consumer Advertising</i>			
Charity Organizations	Atlanta, GA	Multi-product	02-06-22
Charity Organizations	Various locations	Multi-product	02-04-01
Quebec Office Miami	Miami, FL	Multi-product	
Quebec Trade Office	Atlanta, GA	Multi-product	
<i>Marketplaces</i>			
AA Travel Expo	Dallas, TX	Multi-product	02-03-01
AMMC	Rhode Island	MC IT	02-07-01
ASAE Conference	Denver, CO	MC IT	02-08-16
ASTA Cruise Fest	Miami, FL	Multi-product	02-06-01
ASTA Great Americas	Miami, FL	Multi-product	03-02-01
Helms Briscoe Fair	Connecticut	MC IT	02-12-11
Hispanic Meeting Planners	Las Vegas, NV	MC IT	02-06-23
IAEM Conference	Dallas, TX	MC IT	02-06-18
IT & ME	Chicago, IL	MC IT	02-09-24
Limra Insurance	Boston, MA	MC IT	02-10-27
Meeting Quest	Atlanta, GA	MC IT	02-09-15
Meeting Quest	Dallas, TX	MC IT	02-11-08
MPI PEC	Orlando, FL	MC IT	02-02-02
MPI Regional	Atlanta, GA	MC IT	03-02-01
MPI Regional	Dallas, TX	MC IT	03-02-01
MPI WEC	Toronto, ON	MC IT	02-07-18
National Trade Shows	Nashville, Knoxville, Memphis and Chattanooga (TN)	Multi-product	02-09-01
PCMA Conference	Anaheim, CA	MC IT	03-01-01
PCMA Meeting	Atlanta, GA	Multi-product	02-04-23
Showcase Canada	Atlanta, GA	MC IT	02-04-24
Showcase Canada	Dallas et Houston (TX)	MC IT	02-04-15
Showcase Canada	South Florida, FL	MC IT	02-12-01
Site International University	Cancun, Mexico	MC IT	02-06-09
TAC Conference	Carolina's, CA	Multi-product	03-02-01

MARKETS: STRATEGIES AND OPERATING BUDGETS

Travel Agents of Tennessee	Nashville, TN	Multi-product	02-07-26
Travel Trade	Miami, FL	Multi-product	02-12-06
Trips Unlimited	New Orleans, LA	Multi-product	03-01-01
<i>Seminars</i>			
CTC	Atlanta, GA	MC IT	02-11-01
Fairmont Hotels	Dallas, TX	MC IT	02-11-01
Fairmont Hotels	Houston, TX	MC IT	02-11-01
GOGO Tours	Florida	Multi-product	02-08-01
GOGO Tours	Houston, TX	Multi-product	02-06-01
IAHMP	Las Vegas, NV	MC IT	02-06-01
MPI	Dallas, TX	MC IT	02-07-01
<i>Consumer Trade Shows</i>			
AARP	Orlando, FL	Multi-product	03-01-01
Citrus County Show	Tampa, FL	Multi-product	03-01-01
Snowbird Extravaganza	Tampa, FL	Multi-product	03-01-01
Texas Ski Bid Fest	San Antonio, TX	Ski	02-04-19
Vacation / Leisure / Outdoor	Houston, TX	Multi-product	03-02-01
<i>Receptions</i>			
AMMC	Connecticut	MC IT	02-07-01
Braves / Expos baseball game	Atlanta, GA	MC IT	02-09-01
Predators / Canadians hockey game	Nashville, TN	MC IT	03-02-01
Quebec Day / Cirque du Soleil	Austin, TX	MC IT	02-11-01
Quebec Day / Cirque du Soleil	New Orleans, LA	MC IT	02-11-01
Quebec Marketplace	Orlando, Tampa and Fort Lauderdale (FL)	Multi-product	02-09-01
<i>Familiarization Tours</i>			
Air Canada	Québec and Montréal (QC)	Multi-product	03-01-01
Air Canada	Tremblant and Montréal (QC)	Multi-product	02-05-01
American Airlines	Dallas, TX	Urban tourism	02-04-25
CTC - Atlanta	Montréal, QC	MC IT	02-08-01
CTC - Dallas	Montréal and Québec (QC)	MC IT	02-08-01
CTC - Florida	Québec, QC	MC IT	02-10-01
Fairmont / CTC	Montréal, QC	MC IT	02-06-01
Fairmont Hotels, CTC	Québec, QC	MC IT	02-07-01
Site Inspections	Montréal and Québec (QC)	MC IT	02-07-01
<i>Press Relations</i>			
Travel Media Showcase	Montgomery, AL	Multi-product	02-06-23
Travel Writers		Multi-product	
WRR 101 Radio / Acadian Railway		Multi-product	02-07-19

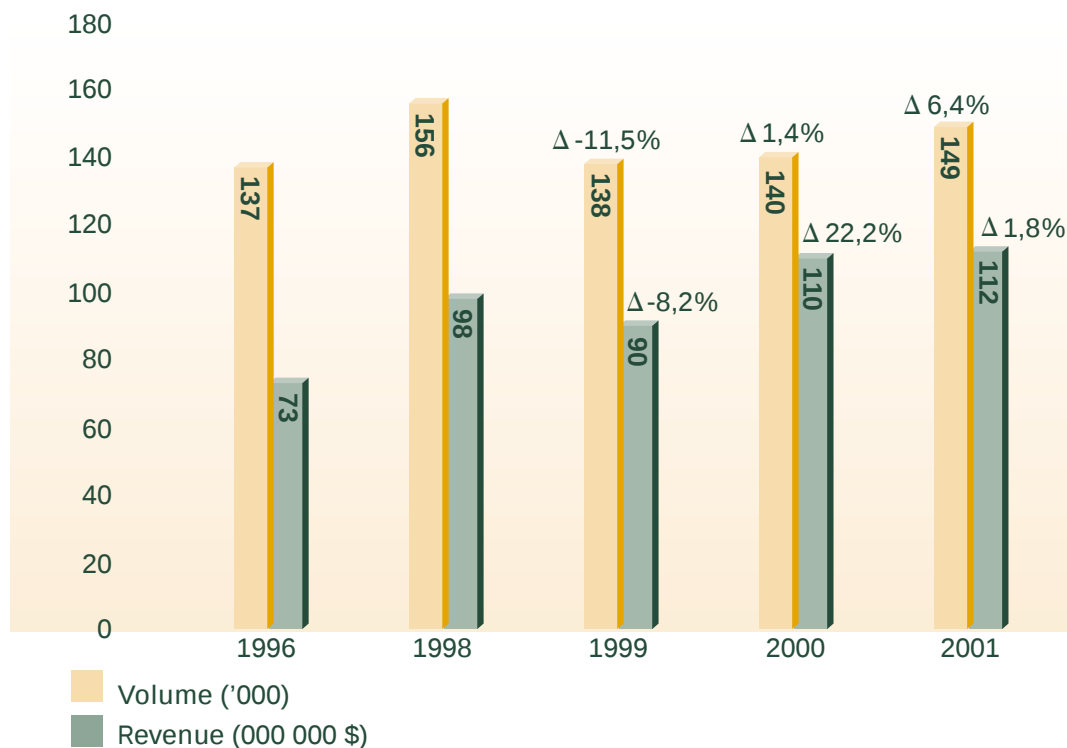
WEST

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

Like the South, the West shows enough promise to justify a Level 3 investment.

- Compared to Americans from other regions, residents in the West show the greatest propensity for travel outside the United States. They seek unusual and lively tourist experiences.
- In 2001, the West represented 6% of the volume and 9% of tourist spending originating on the American market. This region accounts for 0.7% of the volume and 2% of total tourism revenue in Québec.
- Despite the economic slowdown and the events of September 11th, the West recorded a significant increase in the number of tourists (+6.4%); however, it was the region canvassed in the United States that recorded the weakest increase in revenue (+1.8%). Note, however, that for a second year in a row, the volume of tourists and tourism revenue increased.

**Evolution of the
West – United States Market**



Source: Statistics Canada, *International Travel Survey*

Δ Annual percentage change

Strategies and Action Priorities for 2002-2003

- Continue to work with Canadian partners (Air Canada, Fairmount Hotels, etc.), in promoting Québec in this region of the United States.
- Pursue direct marketing efforts based on existing databases.
- Organize press relations activities and update media lists.
- Consolidate contacts in the distribution network through participation in marketplaces.
- Intensify representations among potential clientele in the corporate and incentive travel sector.

2002-2003 Operating Budget for Western United States

Category	Budget (,000)	%
Advertising and Promotion	0,0	0,00
<i>Territorial advertising</i>	<i>0,0</i>	
Marketing	133,2	24,40
<i>Marketplaces</i>	<i>72,1</i>	
<i>Consumer trade shows</i>	<i>7,2</i>	
<i>Receptions</i>	<i>41,1</i>	
<i>Familiarization tours</i>	<i>12,8</i>	
Press Relations	66,9	12,25
Canvassing	345,8	63,35
Total Western United States	545,9	100,00

Activities Scheduled in the West

Activities	City	Product	Date
<i>Territorial Advertising</i>			
Travel Guide		Multi-product	02-04-01
<i>Bourses</i>			
California & Washington Mission	Los Angeles, San Diego (CA)	Multi-product	02-05-05
Various marketplaces		Nothing specific	02-04-01
Fairmount California Sales Week	Northern & Southern CA	MC IT	02-11-07
Mission Eco Tour Seattle	Seattle, OR	Multi-product	02-05-13
MPI - PEC		MC IT	03-01-18
MPI - WEC 2002	Toronto, ON	MC IT	02-07-21
NCC - MPI	San Francisco, CA	MC IT	03-02-10
NTA Los Angeles	Los Angeles, CA	Multi-product	02-11-08
SCC - MPI	Los Angeles, CA	MC IT	02-11-01
Showcase Canada	Seattle, OR	MC IT	02-06-13
Showcase Canada	Los Angeles, CA	MC IT	02-08-01
Showcase Canada	San Francisco, CA	MC IT	03-03-15
SITE Intl. Conference	Miami, FL	MC IT	02-12-08
SITE - University 2002	Cancun, MEX	MC IT	02-06-09
SYTA	San Jose, CA	Multi-product	02-09-21
Trailblazers	Las Vegas, NV	MC IT	02-07-26

Consumer Trade Shows			
LA Times Travel Show	Los Angeles, Long Beach (CA)	Multi-product	03-02-24
Receptions			
Cirque du Soleil / Quebec Day	San Francisco, CA	MC IT	02-11-01
Helms Briscoe	Phoenix, AZ	MC IT	02-12-15
NCC - MPI Annual golf tournament	Carmel, CA	MC IT	02-05-19
Québec Chefs (MAPAQ) - 2001-2002 Report	San Francisco, CA	Multi-product	02-03-10
San Diego MPI Annual Golf	San Diego, CA	MC IT	02-04-25
SITE Southern California Holiday Luncheon	San Diego, CA	MC IT	02-12-13
Familiarization Tours			
Fairmount Hotels & Air Canada Fam Trip	Montréal and Québec (QC)	Multi-product	02-04-11
Fam Tours - Open	Québec, QC	MC IT	02-04-01
Intrawest Tremblant Fam Tour	Tremblant, QC	Multi-product	02-07-17
Press Relations			
Air Canada Press Luncheon	San Francisco, CA	Multi-product	02-04-04
Canada Media Marketplace	Pasadena, CA	Multi-product	02-04-28
Out & About in Québec	Québec, QC	Multi-product	02-04-13
Passport Magazine au Québec	Québec and Montréal (QC)	Multi-product	02-04-26
Seattle Media Dinner	Seattle, OR	Multi-product	03-02-03
So. California Travel Media Reception & Dinner	Los Angeles, CA	Multi-product	02-08-01
Press tours		Multi-product	02-04-01
Travelscope Winners	Québec and Montréal (QC)	Multi-product	02-05-08

4.2.3 North American Markets: Multi-market Activities

The *Direction des marchés des Amériques* has a budgetary envelope for use in multi-market activities within the territory served by the Direction.

In 2002-2003, the following activities are planned in conjunction with this budget.

Strategies and Action Priorities for 2002-2003

- Participate in marketplaces in order to promote certain niche markets (gay and lesbian tourism, hunting and fishing).
- Organize press relations activities among certain tourist clienteles (gay and lesbian tourism, hunting and fishing).
- Support tourist businesses in a cooperative promotion program known as *Partenaires de l'extérieur*.
- Consolidate the North American market committee and provide financial support for promotional activities undertaken on this market.

2002-2003 Operating Budget for Multi-markets in America

Category	Budget (,000)	%
Marketing	393,1	12,32
<i>Marketplaces</i>	<i>80,3</i>	
<i>Consumer trade shows</i>	<i>207,8</i>	
<i>Receptions</i>	<i>105,0</i>	
Press Relations	293,6	9,20
Canvassing - Telemarketing	240,0	7,52
Cooperative Promotion Program	2 265,0	70,97
<i>Foreign partners</i>	<i>165,0</i>	
<i>North American market committee</i>	<i>2 100,0</i>	
Total	3 191,7	100,00

Activities Scheduled for Multi-markets in America

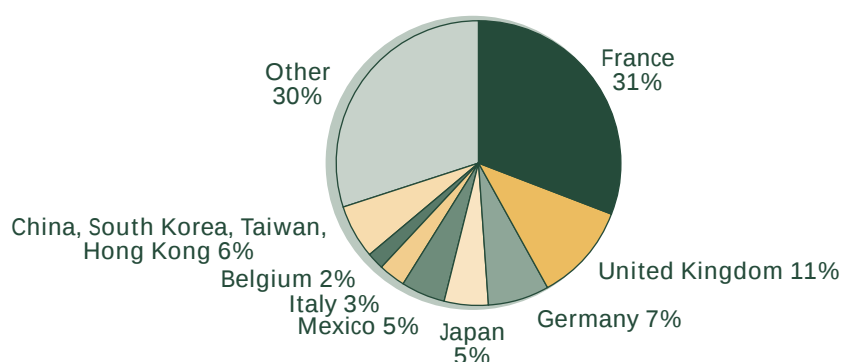
Activities	City	Product	Date
<i>Marketplaces</i>			
Various marketplaces		Multi-product	02-04-01
Gay and lesbian tourism		Multi-product	02-04-01
<i>Consumer Trade Shows</i>			
Various shows		Multi-product	02-04-01
Hunting and fishing show		Hunting & fishing	02-04-01
Business tourism show		MC IT	02-04-01
<i>Receptions</i>			
Various receptions		Multi-product	02-04-01
Various receptions - Montréal		Multi-product	02-04-01
Rendez-vous Canada - Receptions	Halifax, NS	Multi-product	02-05-18
<i>Press Relations</i>			
Hunting and fishing		Hunting & fishing	02-04-01
Various tours		Multi-product	02-04-01
The Fletchers in Montréal	Montréal, QC	Multi-product	02-04-01
Gay and lesbian tourism		Multi-product	02-04-01
Post-Summit tour		Multi-product	02-04-01
<i>PPC - Foreign partners</i>			
Various projects	Various locations	Multi-product	02-04-01
<i>PPC - North American Market Committee</i>			
Various projects	Various locations	Multi-product	02-04-01

4.3 OTHER INTERNATIONAL MARKETS

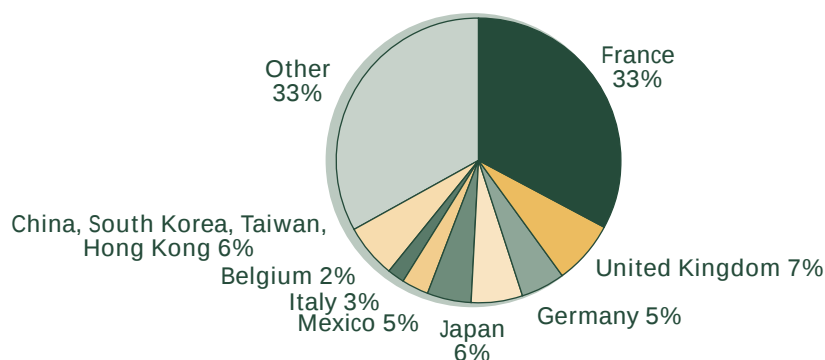
A Significant Contribution to Total Tourism Revenue in Québec

- In 2001, international markets accounted for only 6% of tourists, but contributed to 18% of the total tourism revenue in Québec.
- From 1996 to 2001, the volume of tourists originating from international markets decreased (-7.4%), while tourism revenue progressed only slightly (+ 1.9%).
- In the wake of two years of growth on international markets in 1999 and 2000, the exact opposite occurred in 2001: a 12.5% decrease in tourist volume and an 8.5% decrease in revenue.

Origin of Tourists from Other International Markets in 2001*

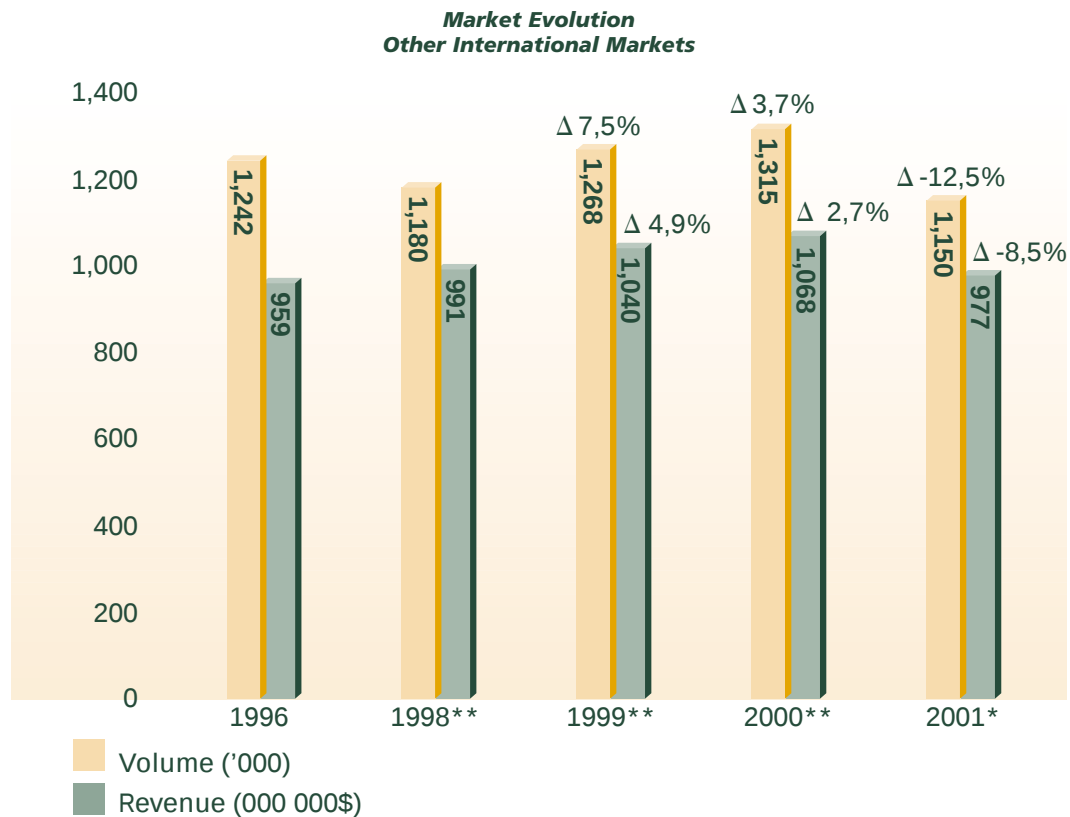


Source of Tourism Revenue from Other International Markets in 2001*



Source: Statistics Canada, *International Travel Survey*

2001*: Tourisme Québec forecast based upon reports from Revenue Canada on the number of border crossing per province, ISSN 1492-4285, November 2001.



Source: Statistics Canada, *International Travel Survey*

Δ: Annual percentage change

2001*: Tourisme Québec forecast based upon reports from Revenue Canada on the number of border crossing per province, ISSN 1492-4285, November 2001.

** : Data for 1998, 1999 and 2000 was adjusted by Tourisme Québec based on entries recorded at border crossings.

4.3.1 France (Belgium)

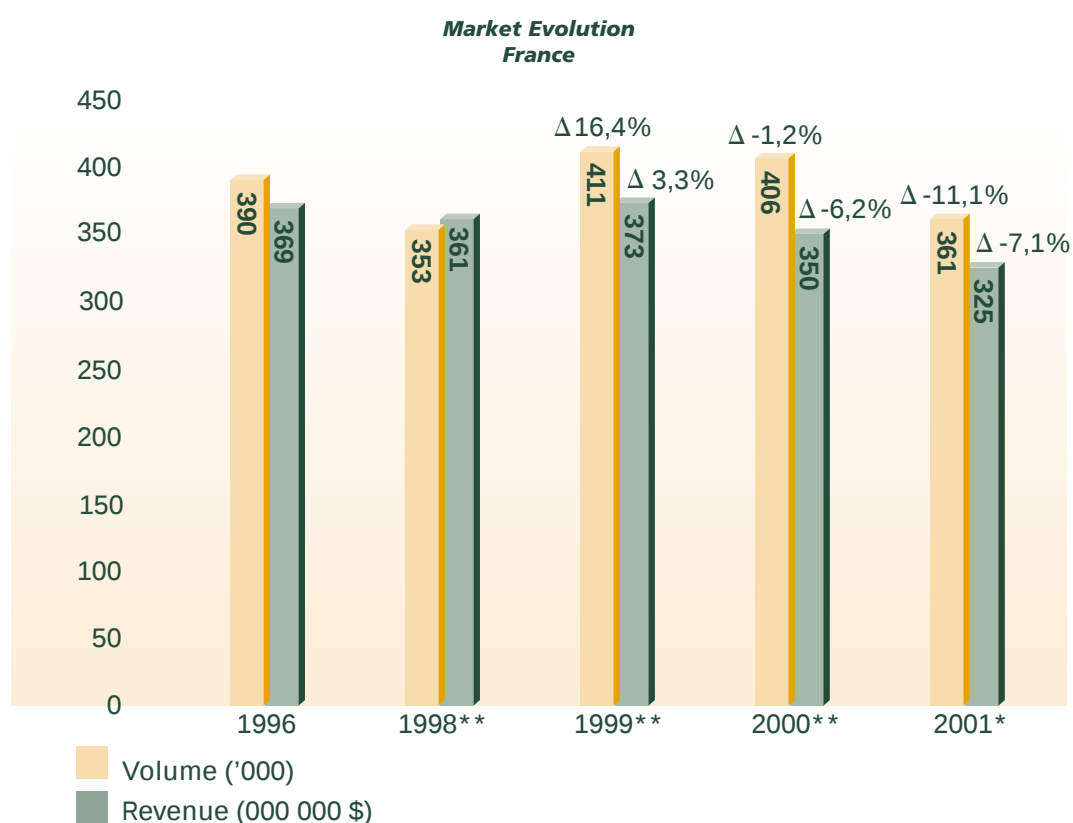
The Tourisme Québec canvassing team covering France also covers Belgium. As a priority market, the investment strategy applied to France is more sophisticated than the strategy used in Belgium, where the potential for development is much lower.

A Strong Tourist Market that is Levelling Out

- In 2001, French tourists accounted for 1.7% of all tourists and 5.9% of total tourism revenue in Québec.
- From 1996 to 2001, this market experienced a decrease in both the number of tourists (-7.4%) and amount of tourism revenue (-11.9%) generated.
- In 2001, market patronage decreased by 11% and tourism revenue by 7%, which, in both cases, represents a decrease slightly lower than that of all international markets taken as a whole.
- However, the French market continues to be the premium European market in Québec. In 2001, this market accounted for 31% of the total volume of

tourists and 33% of all expenditures by international clientele other than the United States.

- Québec continues to dominate over Canada in matters regarding French tourist clientele.
- The French who visit Québec differ from other international visitors in terms of experiences sought:
 - they tend to visit more remote areas of Québec;
 - they are also more interested in visiting Québec in the winter.



Source: Statistics Canada, *International Travel Survey*

Δ: Annual percentage change

2001*: Tourisme Québec forecast based upon reports from Revenue Canada on the number of border crossing per province, ISSN 1492-4285, November 2001.

** : Data for 1998, 1999 and 2000 was adjusted by Tourisme Québec based on entries recorded at border crossings.

Strategies and Action Priorities for 2002-2003

Positioning

Quebecers are renowned for their joie de vivre and the warm welcome they reserve for visitors. The vast expanse of Québec provides visitors with many different kinds of activities from which to choose. Activities abound both in summer and winter. The main products and activities promoted include tours, soft adventure, resort tourism in summer and winter, snowmobiling, hunting and fishing, short stopovers in the city and corporate tourism (meetings, conventions and incentive travel, etc.).

Target Markets

- Paris and surrounding areas, as well as other regions in France with great long-term potential.

Target Clienteles

- Consumers with significant disposable income
- Consumers who travel in the off-season
- Tour operators (leisure 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

- Advertising campaign in the Paris metro, Paris and neighbouring train stations, and bus shelters in the cities of Toulouse, Nantes, Marseille and Lyon to promote summer tourism.
- Advertising campaign in newspapers to promote summer and specific products.
- Advertising campaign in France on hunting and fishing (specialized media, written press and television).
- Web marketing and direct marketing (mailings) to promote the destination in general and some products specifically (short stopovers in cities, snowmobiling, ATVs, etc.).
- Direct marketing among travel agencies and tour operators in France and Belgium.

Consumer Advertising

- Distribution of the list of French and Belgian tour operators (summer and winter) among consumers: by mail, in trade shows and via the Internet.
- Promotional activities in cooperation with partners (contest games, reporting, events, etc.).

Press Relations

- Welcome different media teams during group or individual press tours.
- Support events that showcase the various regions of Québec.
- Press releases and occasional conferences in support of trade shows to launch product advertising campaigns, etc.
- Publish "Québec en bref" summary statements for the media.

Distribution Network

- Support during commercial events originating in the distribution network.
- Participate in marketplaces, trade shows and major conventions (France and Belgium).
- Present, position and consolidate the destination among specialists and incentive travel agencies in France and Belgium.
- Organize familiarization tours to present new products to tour operators.
- Participate in seminars presenting Québec and its products to travel agencies and tour operators.
- Organize a training seminar to present French and Belgian markets to tourism industry players in Québec.
- Organize seminars presenting products currently under development (adventure tourism, Aboriginal tourism, parks, etc.).

2002-2003 Operating Budget for France (Belgium)

Category	Budget (,000)	%
Advertising and Promotion	978,5	45,41
<i>Advertising - Overseas</i>	890,0	
<i>Consumer advertising</i>	88,5	
Marketing	116,5	5,41
<i>Marketplaces</i>	11,0	
<i>Seminars</i>	3,0	
<i>Consumer trade shows</i>	89,5	
<i>Familiarization tours</i>	13,0	
Press Relations	100,0	4,64
Canvassing	894,6	41,52
Cooperative Promotion Program	65,0	3,02
<i>External partners</i>	65,0	
Total	2 154,6	100,00

Activities Scheduled in France (Belgium)

Activities	City	Product	Date
<i>Advertising - Overseas</i>			
Spring signage campaign	Paris, Toulouse, Nantes, Marseille and Lyon	Tours	02-04-01
Hunting and fishing campaign		Hunting & fishing	02-04-01
Written press campaign		Urban tourism and Tours	02-04-01
<i>Consumer Advertising</i>			
Chaîne voyage / Vacances Air Transat		Tours	02-04-01
Short stopovers in cities		Urban tourism	02-04-01
Groupe Larivière		Multi-product	02-04-01
Les Éditions de l'homme		Tours	02-05-01
Updating of the tour operators' list		Multi-product	

MARKETS: STRATEGIES AND OPERATING BUDGETS

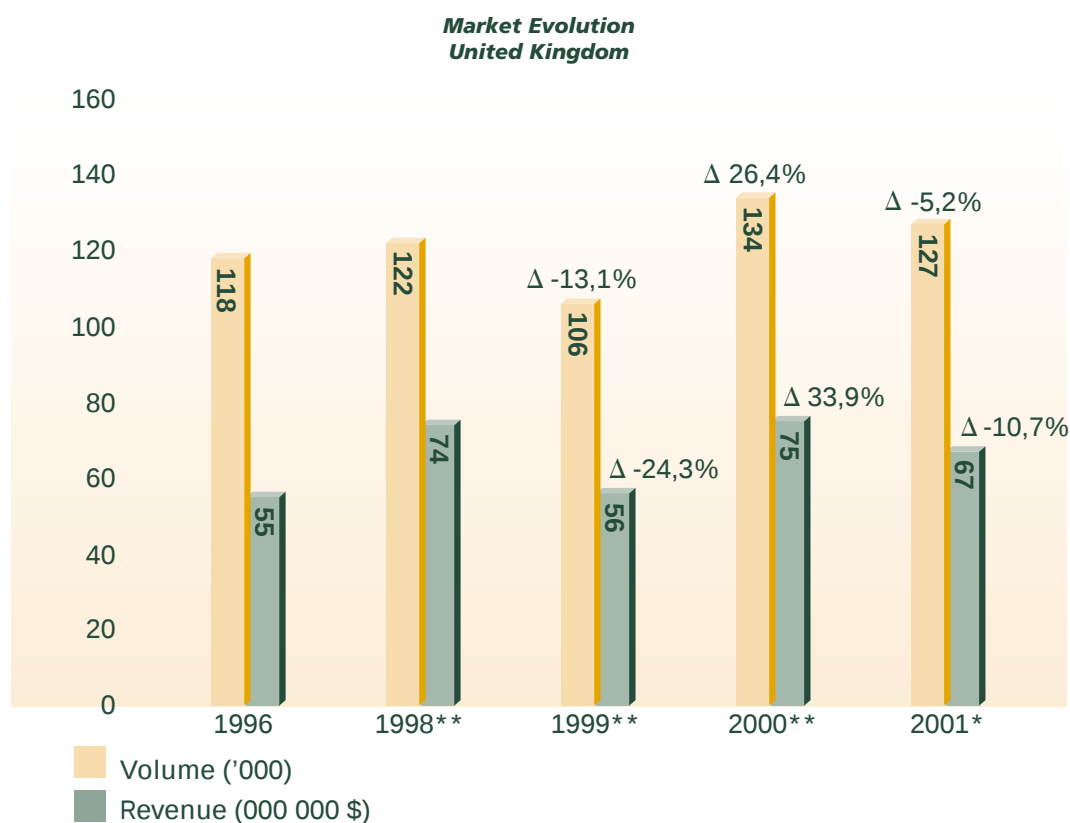
Marketplaces			
Top Resa	Deauville	Tours	02-09-27
Seminars			
Formation Spécialistes Canada		Tours	02-04-01
Consumer Trade Shows			
Country show	Paris	Hunting & fishing	02-05-01
Journées méditerranéennes	Isle sur Sorgue	Hunting & fishing	02-06-01
Hunting & fishing	Lyon	Tours	03-03-01
Mahana	Paris	Tours	02-04-01
Rando Expo	Bruxelles, BEL	Tours	03-03-01
Vacation trade show	Luxembourg	Tours	03-01-01
Vacation trade show	Marseille	Tours	03-02-01
Tourism trade show	Toulouse	Tours	03-03-01
Tourism and vacation trade show	Nantes	Tours	03-03-01
World tourism trade show	Paris	Tours	03-03-01
SITV	Colmar	Tours	02-11-01
Familiarization Tours			
Winter tourism tour		Tours	02-06-01
Air Transat vacation tour		Snowmobiling	03-02-01
Press Relations			
BFM - Mine de rien	Montréal, QC	Multi-product	02-04-25
City Guide	Montréal, QC	Multi-product	02-04-28
Détours du Monde	Montréal, QC	Multi-product	02-05-10
Femme actuelle	Montréal, QC	Multi-product	02-04-16
Grands reportages	Far North	Multi-product	02-04-07
La Compagnie du Canada et des Etats-Unis	Montréal, QC	Multi-product	02-04-11
Routard.com		Multi-product	
Women's press tour	Montréal, Québec and Charlevoix (QC)	Tours	02-05-16
Vif week-end	Montréal, Charlevoix and Estrie (QC)	Multi-product	02-06-03
Pres tours		Nothing specific	
PPC - External Partners			
Cunard France		Tours	02-04-01
Grand Élan		Snowmobiling	02-04-01
Vacances Air Transat		Tours	02-04-01
Visit Canada		Tours	02-04-01

4.3.2 United Kingdom (Netherlands and Scandinavia)

The Tourisme Québec canvassing team based in London serves the United Kingdom, the Netherlands and Scandinavia. As a priority market, the investment strategy applied to France is more sophisticated than the strategy used in the Netherlands and Scandinavia.

Sluggish Growth

- In 2001, British tourists accounted for 0.6% of all tourists and 1.2% of tourism revenue in Québec.
- Between 1996 and 2001, this market experienced an upswing in volume (+7.6%) and revenue (+21.8%).
- However, in 2001, following remarkable progression in 2000, the volume of tourists and tourism revenue dropped 5.2% and 10.7%, respectively.



Source: Statistics Canada, *International Travel Survey*

Δ: Annual percentage change

2001*: Tourisme Québec forecast based upon reports from Revenue Canada on the number of border crossing per province, ISSN 1492-4285, November 2001.

** : Data for 1998, 1999 and 2000 was adjusted by Tourisme Québec based on entries recorded at border crossings.

Strategies and Action Priorities for 2002-2003

Positioning

Positioning targets the following aspects: Montréal, Québec, French atmosphere, gastronomy, accessibility, safety, price-quality ratio, the “joie de vivre” and trendy, cosmopolitan character of Québec, outstanding natural surroundings and whale watching near large urban centres.

Target Clienteles

- Young, well-to-do couples with limited spare time
- The gay and lesbian community
- Families seeking a medium-range product, particularly skiing
- Consumers aged 25 and older seeking action-packed vacations
- Consumers aged 50 and older seeking high-end activities oriented towards culture and nature
- New products to develop: garden tours, parks and wildlife observation
- Tour operators and travel agencies (about 930) specializing in the Canadian destination, urban tourism and leisurely income travel
- Incentive travel clientele
- Convention organizers
- Consumers who have visited Canada previously and travel individually

Theme

Québec 4U*

The campaign is a joint endeavour with Jazz-FM. It is a radio campaign based on word games involving tourist products in Québec and the use of the Internet by consumers making travel arrangements.

Marketing Strategies

Advertising

- Advertising campaign aimed at industry professionals in media such as TTG, Selling Long Haul and Travel Weekly; and specialized magazines for the incentive travel market segment.
- Production and distribution of the *Essentially Quebec brochure* reedited to mirror the Website and the list of tour operators offering Québec.

Consumer Advertising

- Promotional activity specific to Québec on the Jazz-FM radio station. Advertising refers the consumer to the website and a special phone number.

Press Relations

- Maintain close contact with the written press, e-press and specialized press.
- Organize press tours in conjunction with positioning objectives established for this market.

Distribution Network

- The Ontario-Québec training program will continue in 2002-2003. 1 000 videocassettes will be distributed to tour operator sales representatives.
- In Canada Outlook in 2002: the emphasis will be placed on training internal sales personnel working for British wholesalers.

**2002-2003 Operating Budget for the United Kingdom
(Netherlands and Scandinavia)**

Category	Budget (,000)	%
Advertising and Promotion	259,0	19,83
<i>Advertising-Overseas</i>	25,0	
<i>Consumer advertising</i>	234,0	
Marketing	141,0	10,81
<i>Marketplaces</i>	39,5	
<i>Seminars</i>	33,5	
<i>Consumer trade shows</i>	31,0	
<i>Receptions</i>	12,0	
<i>Familiarization tours</i>	25,0	
Press Relations	100,0	7,66
Canvassing	732,1	56,07
Cooperative Promotion Program	73,7	5,64
<i>External partners</i>	73,7	
Total	United Kingdom (Netherlands and Scandinavia)	
	1 305,8	100,00

Activities Scheduled in the United Kingdom (Netherlands and Scandinavia)

Activities	City	Product	Date
Advertising - Overseas			
Canada Travel Planner		Tours	02-04-01
Spirit of Canada		Tours	02-04-01
TTG / TWC & IT Mag. / MC IT Mag. (Monthly)		Tours	02-04-01
Consumer Advertising			
Direct marketing / British Airways	United Kingdom	Tours	02-09-01
Direct media marketing	United Kingdom	MC IT	02-04-01
MC IT direct marketing	United Kingdom	Tours	03-03-01
Jazz-FM radio promotion	London	Tours	
Travel Trade Competition Fax Mailing	United Kingdom	Tours	02-08-01
Marketplaces			
Confex	London	MC IT	03-03-01
Scandinavian Countries	Denmark, Sweden, Norway	Tours	02-04-01
Spotlight Canada	London	Tours	03-03-01
World Travel Market	London	Tours	02-11-01

MARKETS: STRATEGIES AND OPERATING BUDGETS

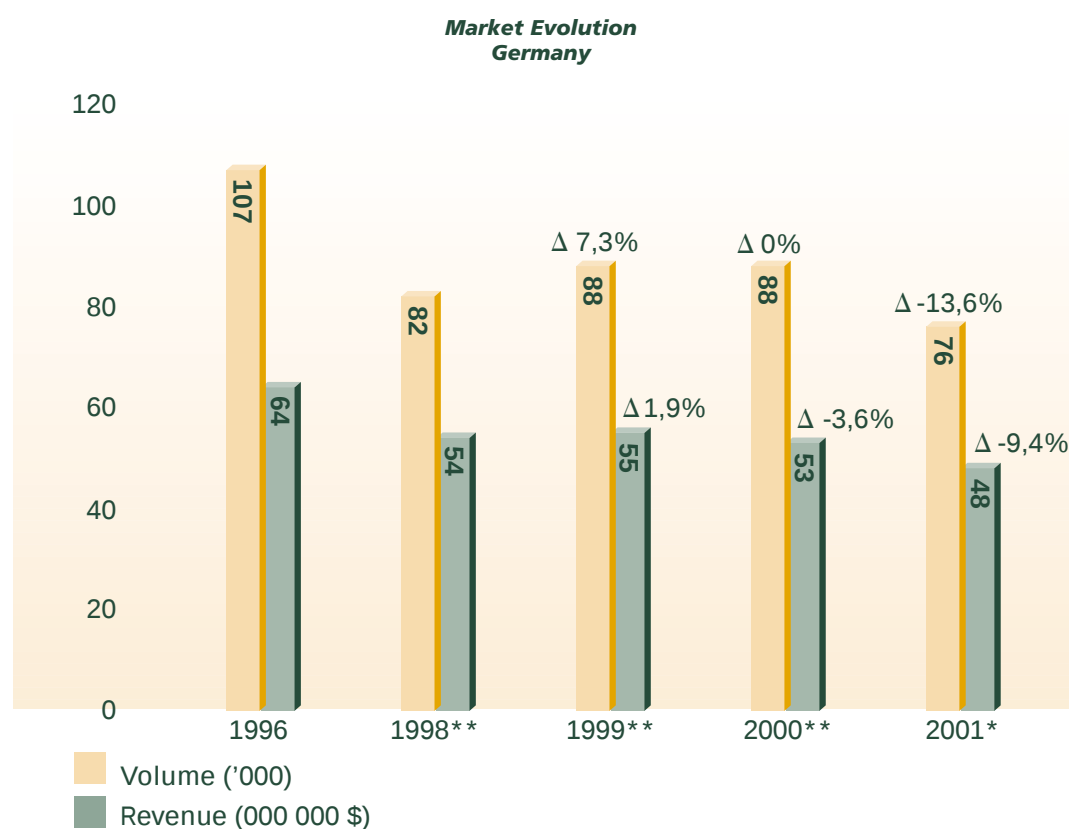
<i>Seminars</i>			
Canada Counsellors Outlook	United Kingdom	Tours	02-04-01
Canada Seminars	United Kingdom	Tours	02-04-01
Oriana Conference & Incentive Promotion	United Kingdom	MC IT	02-10-24
Tour operator profiles	London	Tours	02-04-01
Scandinavian Road Show	Denmark, Sweden, Norway	Ski	02-10-01
Training Video Programme	United Kingdom	Tours	02-04-01
<i>Consumer Trade Shows</i>			
Bournemouth Holiday Show	Bournemouth	Tours	03-01-01
Consumer Holiday Shows	Cheltenham, Birmingham, Excel, Cork, Belfast	Tours	02-06-01
Destinations 2003	Glasgow	Tours	03-02-01
Dublin Show	London	Tours	03-01-01
Holiday Show G-Mex	Ireland	Tours	03-01-01
TUR - Gothenburg	Manchester	Tours	03-03-01
Vakantie	Sweden The Netherlands	Tours	03-01-01
<i>Receptions</i>			
Canada Travel Awards	London	Tours	03-02-01
Gala Event (Guild of Travel & Tourism / Guild of British Travel Writers)	London	Tours	02-04-01
Ontario / Quebec Evening	London	Tours	03-02-01
<i>Familiarization Tours</i>			
Canada Outlook Specialists Super Fam	Montréal and regions	Tours	02-06-01
Incentive travel tour	Estrie and maritime Québec	MC IT	02-04-01
Travel Agents / Tour Operators Staff Fam.		Tours	02-04-01
<i>Press Relations</i>			
Agence de relation publiques HDM		Nothing specific	02-04-01
Agence de relations publiques P. Laing		Nothing specific	02-04-01
BBC - Lucy Hockings	Québec, QC	Multi-product	02-05-05
Jazz FM	Montréal and Québec (QC)	Multi-product	02-05-20
Jazz FM	Montréal and Québec (QC)	Multi-product	02-05-30
Pacio		Multi-product	02-04-01
Sarah Tucker		Multi-product	
Press Tours		Nothing specific	02-04-01
<i>PPC - Exterior Partners</i>			
Jan Doets America Tours		Tours	02-04-01
Tailor Made Travel		Tours	02-04-01
Travelbag		Tours	02-04-01
Windows on the wild		Tours	02-04-01

4.3.3 Germany (Austria and Switzerland)

The Tourisme Québec canvassing team that covers Germany also handles Switzerland and Austria. As Germany is a priority market, its investment strategy is more significant than those of Switzerland and Austria.

The Market Declined in 2001

- In 2001, German tourists accounted for 0.4% of visitors and 0.9% of Quebec's tourism revenue.
- From 1996 to 2001, this market suffered a significant decrease in volume (-29%) and tourism revenue (-25%).
- In 2001, after two relatively stable consecutive years, the German market experienced a decrease in the volume of tourists and in tourism revenue of 13.6% and 9.4%, respectively.



Source: Statistics Canada, *International Travel Survey*

Δ: Annual percentage change

2001*: Tourisme Québec forecast based upon reports from Revenue Canada on the number of border crossing per province, ISSN 1492-4285, November 2001.

** : Data for 1998, 1999 and 2000 was adjusted by Tourisme Québec based on entries recorded at border crossings.

Strategies and Action Priorities for 2002-2003

Positioning

Positioning is based upon the following themes: adventure, nature and the outdoors, soft adventure, welcoming and exciting urban stays, cultural exchanges and historic sites. The objective is to develop a strong image. The French aspect of Québec is perceived as value-added: gastronomy, culture, etc.; however, Germans remain concerned about being understood.

Target Clienteles

- Well-off and educated consumers
- Couples rather than families
- Younger retired people
- Incentive travel clienteles
- Travel wholesalers and agents

Marketing Strategies

Advertising

- Advertising campaign.
- Positioning advertising campaign targeting industry professionals (specialized publications).

Press Relations

- Maintain close ties with the specialized written and electronic press and emphasize media canvassing
- In accordance with positioning objectives, organize individual and group press tours in partnership.
- Participate in the International Tourism Börse, in Berlin.
- Distribute a monthly information bulletin via email and, in print, four quarterly bulletins intended for selected wholesalers and travel agents (IATA) in Germany, Switzerland and for the German-speaking media.

Distribution Network

- Maintain efforts with tour operators in order to take advantage of the Frankfurt-Montréal link.
- Participate in the Canadian Tourism Commission's travelling presentations and seminars to consumers.
- Hold presentations similar to those of the *Grands Explorateurs*.
- Support wholesalers who invest in new product promotion.
- Organize familiarization tours for wholesalers and travel agents.

2002-2003 Operating Budget for Germany (Austria and Switzerland)

Category	Budget (,000)	%
Advertising and Promotion	42,6	5,46
<i>Advertising - Overseas</i>	12,6	
<i>Consumer advertising</i>	30,0	
Marketing	105,2	13,48
<i>Marketplaces</i>	50,0	
<i>Seminars</i>	11,0	
<i>Consumer trade shows</i>	9,0	
<i>Receptions</i>	0,7	
<i>Familiarization tours</i>	34,5	
Press Relations	147,2	18,86
Canvassing	426,9	54,70
Cooperative Promotion Program	58,5	7,50
<i>External partners</i>	58,5	
Total Germany (Austria and Switzerland)	780,4	100,00

Activities Scheduled in Germany (Austria and Switzerland)

Activities	City	Product	Date
<i>Advertising - Overseas</i>			
Spring Package Tour/ CCT	Germany	Tours	02-04-01
<i>Consumer Advertising</i>			
Imax Movie / Cirque du Soleil	Munich	Multi-product	
Whale and Dolphin Conservation Society (WDCS) competition	Germany	Nothing specific	
<i>Marketplaces</i>			
EIBTM	Geneva (SWI)	MC IT	02-05-21
ITB	Berlin	Multi-product	03-03-07
<i>Seminars</i>			
DER Roadshow	10 German cities	Tours	03-01-01
Super Fam	Victoria (AUS)	Tours	02-11-04
Visit North America Seminar	Zurich (SWI)	Multi-product	03-01-01
<i>Consumer Trade shows</i>			
CBR	Munich	Multi-product	03-02-15
CMT	Stuttgart	Multi-product	03-01-18
Ferienmesse	Geneva (SWI)	Multi-product	03-01-31
Ferienmesse	Vienna (AUS)	Multi-product	03-01-09
Ferienmesse Bern	Bern (SWI)	Multi-product	03-01-09
Fespo Zürich	Zurich (SWI)	Multi-product	03-01-23
Reisen & Camping	Essen	Multi-product	03-03-26
Reisemarkt Köln International	Cologne	Multi-product	02-11-29
Tourist & Caravanning	Leipzig	Multi-product	02-11-19
<i>Receptions</i>			
CMT Tour operator Evening	Stuttgart	Multi-product	03-01-01
<i>Familiarization Tours</i>			
Air Transat Spring Tour/Agents	Germany	Tours	02-05-01
Air Transat / Tour Operator	Germany	Nothing specific	02-05-01
	Québec, QC	Multi-product	02-05-13
CSP Fam Trip Germany			

Press Relations

Wilde & Partner Agency	Montréal and Montréal (QC)	Nothing specific	02-04-01
Austrian Airlines		Multi-product	02-05-01
Video copy		Multi-product	02-04-01
Teletour		Nothing specific	02-04-01
Media Tours		Nothing specific	02-04-01
Travel Channel			

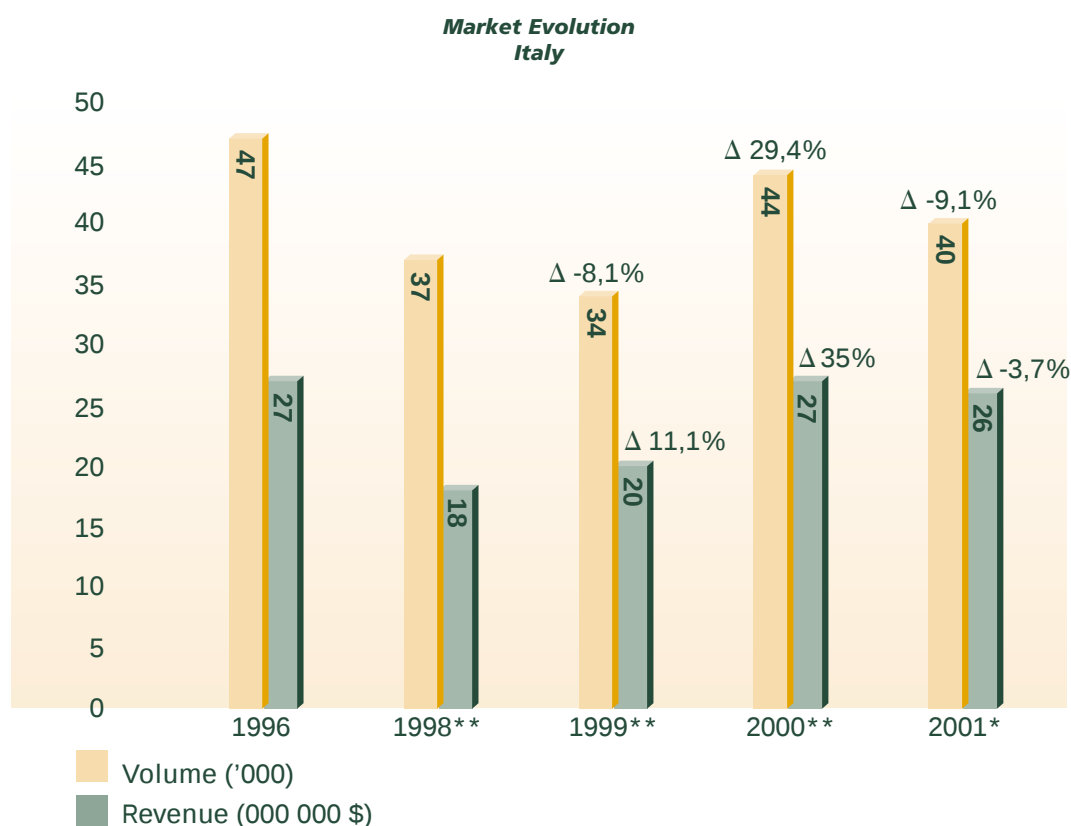
PPC - External Partners

Canusa	Tours	02-04-01
DERTOUR	Tours	02-04-01
Fasten your seatbelt	Tours	02-04-01
Studios	Tours	02-04-01

4.3.4 Italy

A Market Experiencing a Slight Decrease

- In 2001, Italian tourists represented 0.2% of the volume and 0.5% of Quebec's tourism revenue.



Source: Statistics Canada, *International Travel Survey*

Δ: Annual percentage change

2001*: Tourisme Québec forecast based upon reports from Revenue Canada on the number of border crossing per province, ISSN 1492-4285, November 2001.

**.: Data for 1998, 1999 and 2000 was adjusted by Tourisme Québec based on entries recorded at border crossings.

- Between 1996 and 2001, this market experienced a decline of 14.9% in volume and 3.7% in revenue.
- After the exceptional growth of 2000, the number of Italian tourists in Québec decreased by 9.1% in 2001, while tourism revenue from this market experienced a lesser decrease of 3.7%.
- Leisure travel is increasingly the motivation for Italians travelling in Québec.

Strategies and Action Priorities for 2002-2003

Positioning

Traditional summer and winter products will once again be promoted in this market; however, greater emphasis will be placed on specialized and niche products. Advantage will be taken to attract a significant number of visitors to Québec who attended the Youth Year and Pope Jean Paul II's event in Toronto.

Target Markets

- Central and Northern Italy

Target Clienteles

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

Marketing Strategies

Consumer Advertising

- Promotional campaign in Warner cinemas throughout Italy in cooperation with the CTS.
- Association with non-traditional partners to promote Québec in specialized networks.
- Maintain our presence at consumer tourism trade shows and participation in the Salone Del Gusto.

Press Relations

- Hold press tours.

Distribution Network

- Maintain our presence at the TTG Incontri trade show for the tourism industry.
- Continue our undertakings with the main Italian wholesalers to ensure that Québec tourism products are well represented in their catalogues and adequately distributed.

2002-2003 Operating Budget for Italy

Category	Budget (,000)	%
Advertising and Promotion	5,0	6,25
<i>Consumer advertising</i>	<i>5,0</i>	
Marketing	20,0	25,00
<i>Marketplaces</i>	<i>6,0</i>	
<i>Consumer trade shows</i>	<i>6,0</i>	
<i>Receptions</i>	<i>3,0</i>	
<i>Familiarization tours</i>	<i>5,0</i>	
Press Relations	10,0	12,50
Cooperative Promotion Program	45,0	56,25
<i>External partners</i>	<i>45,0</i>	
Total Italy	80,0	100,00

Activities Scheduled in Italy

Activities	City	Product	Date
Consumer Advertising			
Douglas	National	Multi-product	02-04-01
The Score		Tours	02-06-01
Marketplaces			
BIT	Milan	Tours	03-02-01
TTG Incontri	Riva del Garda	Multi-product	02-10-13
Consumer Trade Shows			
Fiera Padova	Padova	Multi-product	02-04-17
Salone del gusto	Turin	Tours	02-10-01
Receptions			
Receptions for the foreign tourism industry	Québec (QC), Italy and Spain	Multi-product	02-04-01
Familiarization Tours			
Various familiarization tours	Montréal and Québec (QC)	Nothing specific	02-04-01
Air France Tour		product	02-05-01
Giver Tour		MC IT	02-10-01
Il Corte Ingles Tour		Tours	02-04-01
		Multi-product	
Press Relations			
Various press tours	Québec and Gaspésie (QC)	Multi-product	02-04-01
Patrimoine Mondial		Multi-product	02-05-07
Radio Popolare		Multi-product	02-04-01
Rutas del Mondo		Multi-product	02-04-01
PPC - External Partners			
CTS		Tours	02-04-01
Giver		Tours	02-04-01

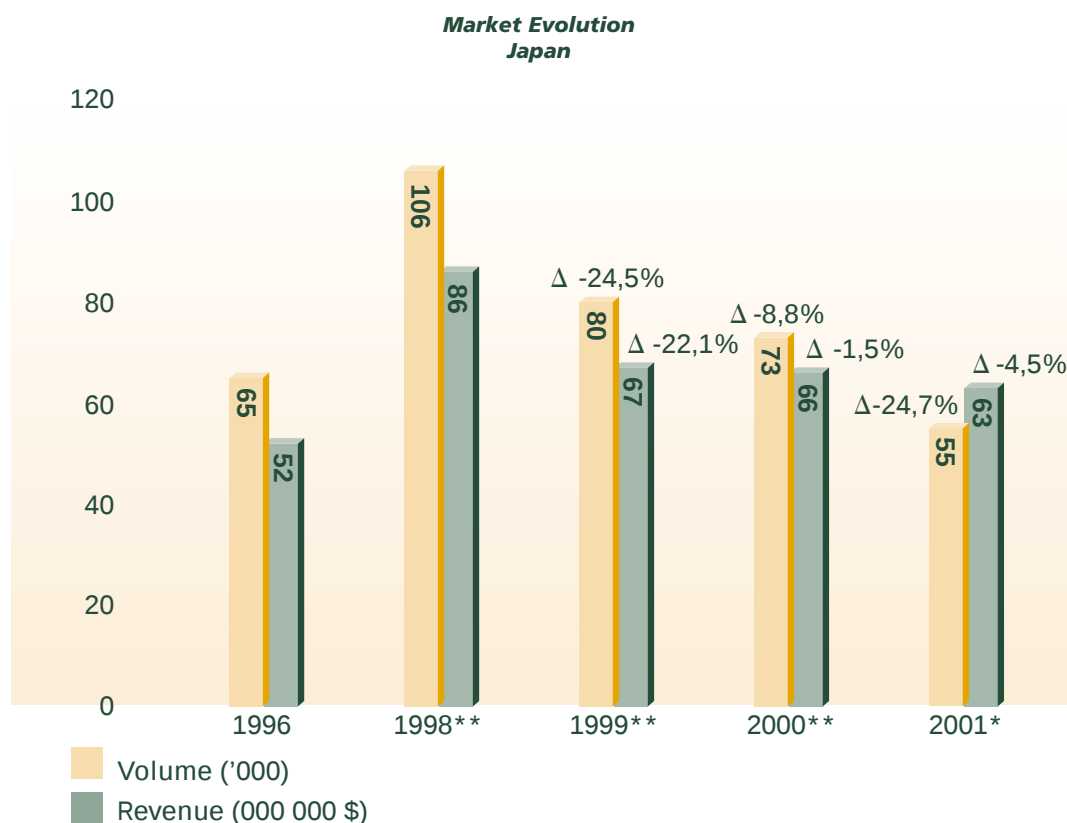
4.3.5 Japan (Oceania and Southeast Asia)

Tourisme Québec's canvassing team, based in Tokyo, covers Japan only.

In 2002-2003, only a few minor initiatives will be undertaken on the other markets of Asia and Oceania; therefore, they have been regrouped under this heading.

A Profitable Market Experiencing a Difficult Time

- Despite a rather bleak economic context over the past years, Japan remains the most profitable tourism market in the Asian-Pacific region and offers significant growth potential. Japanese enjoy overseas travel. There are more than 17 million Japanese who travel abroad yearly, and their numbers continue to grow.
- Since 1998, the volume of Japanese tourists in Québec has continued to decrease. In 2001, the registered decrease was a significant 24.7%. However, tourism revenue from the Japanese market declined less rapidly last year: the decrease was 4.5%.



Source: Statistics Canada, *International Travel Survey*

Δ: Annual percentage change

2001*: Tourisme Québec forecast based upon reports from Revenue Canada on the number of border crossing per province, ISSN 1492-4285, November 2001.

** : Data for 1998, 1999 and 2000 was adjusted by Tourisme Québec based on entries recorded at border crossings.

Strategies and Action Priorities for 2002-2003***Positioning***

Urban tourism and the wide outdoors are promoted with the fall colours as the showcase product. Increased efforts will also be made to promote the summer and spring seasons.

Target Markets

- Tokyo, Osaka, Nagoya, Fukuoka, Sapporo and Chugoku/Shikoku regions.

Target Clienteles

- High-income people aged 54 and older.
- Single women aged 35 and older.

Theme

- The Passion of Discovery

Marketing Strategies***Advertising and Promotions to Consumers***

- Brewster/Air Canada promotional brochure.
- Advertising campaign with the PHP Institute inc. (on the Internet and in magazines).

Press Relations

- Organize individual and group press tours with Air Canada
- Maintain the activities related to the Québec Media Club, established in 2000.

Distribution Network

- Establish a joint program with the regional tourism association (ATR), in order to facilitate industry participation in the Kanata travel grant.
- Undertake a Canvassing mission to broaden knowledge of Quebec's regions and tourism products.

2002-2003 Operating Budget for Japan (Oceania and Southeast Asia)

Category	Budget (,000)	%
Advertising and Promotion	76,4	14,80
<i>Advertising - Overseas (Southeast Asia)</i>	<i>5,0</i>	
<i>Consumer advertising</i>	<i>71,4</i>	
Marketing	27,0	5,23
<i>Marketplaces</i>	<i>10,0</i>	
<i>Seminars</i>	<i>10,0</i>	
<i>Consumer trade shows</i>	<i>4,0</i>	
<i>Receptions</i>	<i>3,0</i>	
Press Relations	66,6	12,90
<i>Japan</i>	<i>51,6</i>	
<i>Southeast Asia</i>	<i>10,0</i>	
<i>Oceania</i>	<i>5,0</i>	
Canvassing	346,3	67,07
Total	516,3	100,00
<i>Japan (Oceania and Southeast Asia)</i>		

Activities Scheduled in Japan (Oceania and Southeast Asia)

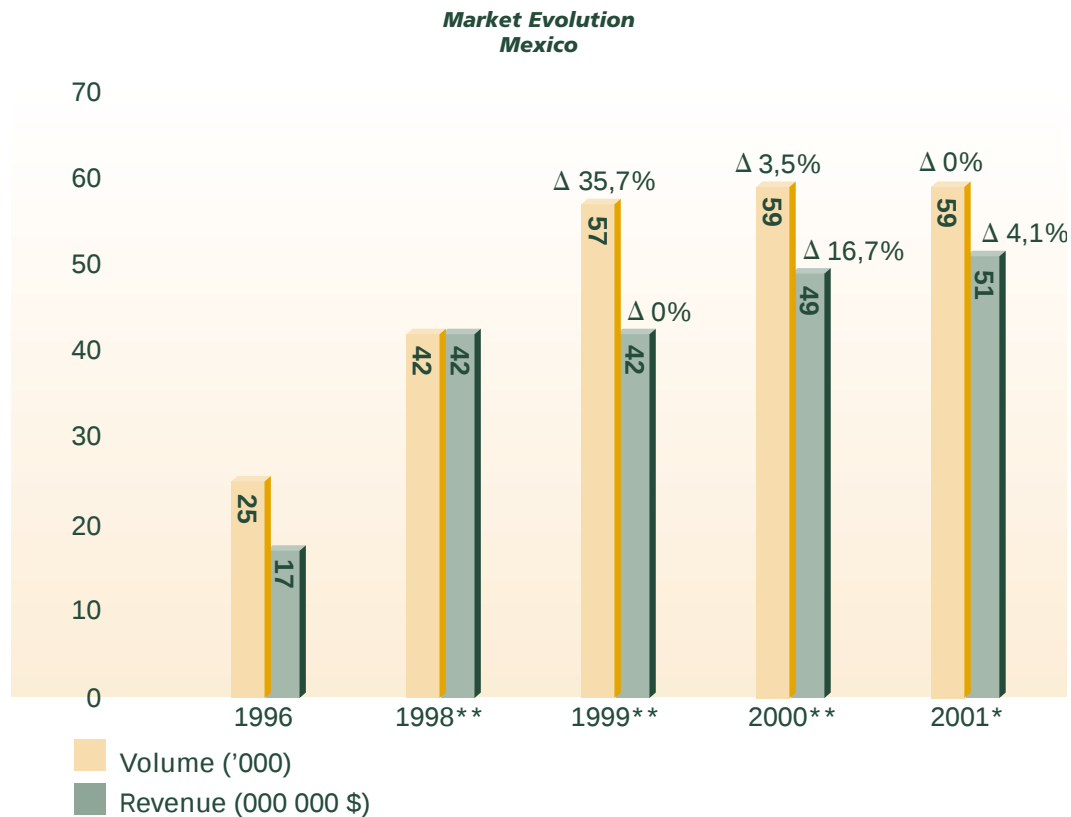
Activities	City	Product	Date
Advertising – Overseas			
Brewster / Air Canada promotional brochure	Southeast Asia	Tours	02-04-01
Consumer Advertising			
Canada Holidays Summer Program	Hong Kong, CHI	Tours	02-04-01
Lake Yamanaka village project		Tours	02-04-01
PHP Media Mix Project		Tours	02-04-01
Marketplaces			
Kanata 2002	Tokyo and Osaka	Tours	02-10-03
Seminars			
Travel Trade Local City Seminars	10 cities in Japan	Tours	02-04-01
Consumer Trade shows			
WTF 2002	Yokohama	Tours	02-09-20
Receptions			
The 24th Canada Cup Golf Tournament	Tokyo and Nagoya	Nothing specific	
Press Relations			
Various Press Tours - New Zealand		Nothing specific	02-04-01
Various Press Tours - Southeast Asia		Multi-product	02-04-01
Harper's Bazaar	Montréal and Estrie (QC)	Multi-product	02-04-07
Print media and TV programs		Tours	02-04-01
Quebec Media Club		Nothing specific	02-04-01

4.3.6 Latin America

Mexico is the target market for Québec in Latin America. It is the most promising in terms of volume. However, when opportunities are presented, certain activities directed towards less important markets will be addressed.

Mexico, a Market Experiencing Steady Growth

- The Mexican market has been growing since 1996; indeed, the volume of tourists has more than doubled (+136%), while tourism revenue from the market has tripled (+200%).
- In 2001, the volume remained stable, matching 2000; on the other hand, revenue increased by 4.1% compared to 2000.



Source: Statistics Canada, *International Travel Survey*

Δ: Annual percentage change

2001*: Tourisme Québec forecast based upon reports from Revenue Canada on the number of border crossing per province, ISSN 1492-4285, November 2001.

**.: Data for 1998, 1999 and 2000 was adjusted by Tourisme Québec based on entries recorded at border crossings.

Strategies and Action Priorities for 2002-2003

- Participate in several marketplaces and shows relevant to these markets.
- Organize missions and specific events in Québec.
- Increase the amount of information on Québec's tourist products likely to interest clientele of these markets.
- Organize individual and group press conferences for media from Mexico, Brazil and Argentina.
- Encourage participation of wholesalers and journalists in events such as *Rendezvous Canada* and *Ontario-Quebec Marketplace*.
- Intensify press relations activities.

2002-2003 Operating Budget for Mexico (Latin America)

Category	Budget (,000)	%
Advertising and Promotion	140,0	42,80
<i>Advertising - America</i>	<i>140,0</i>	
Marketing	45,0	13,76
<i>Marketplaces</i>	<i>20,0</i>	
<i>Receptions</i>	<i>10,0</i>	
<i>Familiarization tours</i>	<i>15,0</i>	
Press Relations	142,1	43,44
Total Mexico (Latin America)	327,1	100,00

Activities Scheduled for Mexico (Latin America)

Activities	City	Product	Date
Advertising - Americas			
Joint campaign with Onvisa and Mexicana		Multi-product	02-04-01
Diana Lee		Multi-product	02-04-01
Econovisa		Multi-product	02-04-01
Global Tourism (5 tour operators)		Multi-product	02-04-01
Julia Tours		Multi-product	02-04-01
Special edition in Spanish		Multi-product	02-04-01
Marketplaces			
CONOZCA Canada 2002	Mexico, Guadalajara and Monterrey (MEX)	Multi-product	02-04-23
Invierno		Multi-product	
La Cumbre		Multi-product	
Receptions			
Activity in Québec / Cirque du Soleil		Multi-product	
Familiarization Tours			
Mexicana	Montréal, QC	Multi-product	02-04-01
Tour operator tours		Multi-product	
Press Relations			
Public relations contract (ZIMAT)		Multi-product	02-04-01
Ruta de los navegantes	Montréal, Québec Charlevoix (QC)	Multi-product	02-05-01
Media tours		Multi-product	02-04-01
VIP Mexica		Multi-product	02-05-30

4.3.7 Overseas Markets: Multi-market Activities

The *Direction des marchés d'outre-mer* has a budget envelope for multi-market activities in territories of interest.

In 2002-2003, the following activities are planned for this budget.

Strategies and Action Priorities for 2002-2003

- Participate in Rendezvous Canada and the *Ontario-Quebec Marketplace*.
- Organize individual and group press tours.
- Consolidate the *Marchés éloignés* committee.
- Provide financial support for promotional activities on these markets.

2002-2003 Operating Budget - Overseas Multi-markets

Category	Budget (,000)	%
Marketing	90,0	18,56
<i>Marketplaces</i>	<i>90,0</i>	
Press Relations	15,0	3,10
Cooperative Promotion Program	380,0	78,35
<i>Market committee - Overseas</i>	<i>400,0</i>	
Total Overseas - Multi-markets	485,0	100,00

Activities Scheduled for Overseas Multi-markets

Activities	City	Product	Date
<i>Marketplaces</i>			
Ontario Quebec Marketplace	Huntsville (ON)	Tours	02-09-29
Rendezvous Canada	Halifax (NS)	Tours	02-05-18
<i>Press Relations</i>			
Multi-market press tours (DMO)		Nothing specific	02-04-01
<i>PPC - Market Committee - Overseas</i>			
Various Projects		Multi-product	02-04-01

4.4 MULTI-MARKET PROMOTIONAL ACTIVITIES**4.4.1 Promotional Publications Service**

In order to position Québec as a destination, Tourisme Québec produces tourist brochures, support material for promotional activities and promotional tools for distribution networks.

Strategies and Action Priorities for 2002-2003

- Introduction of a new promotional video positioning Québec available in seven languages: French, English, Spanish, Italian, Germany, Portuguese and Japanese.
- Production of a new tourist brochure on skiing.
- Digitization of the photo bank in order better to respond to ever-growing needs and improve customer service.
- Continuous updating of the photo library. We will continue to purchase photos and support photo tours to ensure that our collection corresponds to new advertising needs.

Activities Scheduled - Promotional Publications Service

Product	Circulation	Language	Targeted Markets
Fishing & Hunting Packages 2003	60 000	English	United States and Ontario
General video on Québec (VHS)	1 400	French	Québec, France
	1 200	English	United States and Canada
	400	Spanish	South America and Spain
	100	Italian	Italy
	200	Germany	Germany
	200	Portuguese	Brazil and Portugal
	100	Japanese	Japan
General video on Québec (DVD)	1 000		Multi-markets
Calendar of tourist events	40 000	French	Québec, France
in the fall and winter of 2002-2003	40 000	English	Multi-markets
Calendar of events in the spring and summer of 2003	75 000	French	Québec, France
	60 000	English	Multi-markets
Ski brochure	25 000	English	United States and the United Kingdom
Casino folders	75 000	French	Québec
	95 000	English	Multi-markets
Québec Amérique (Reprint)	60 000	French	Québec, France
	80 000	English	Canada, United States and the United Kingdom
	7 000	Germany	Germany

4.4.2 Tourist Information Services

Tourisme Québec fills 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 eight Maison du tourisme information centres.

Strategies and Action Priorities for 2002-2003

- Continue the development of the e-business centre (information, reservations);
- Maintain excellent quality service.

5

Tools for the Industry

Shows, Marketplaces and Fairs

Tourisme Québec offers Québec tourist businesses 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 tourist oriented firms meet distributors and consumers.

The list of marketplaces and fairs planned for 2002-2003 may be found in the *Activities Scheduled* section of each priority tourist market.

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 (ATR)

Tourisme Québec provides financial assistance to regional tourist associations enabling them to fulfill their mission, which is primarily to promote their regional tourist products. An agreement was signed in 2002 with the regional tourist associations. This agreement is valid until 2005.

Sectorial Partnership

Tourisme Québec supports sectorial partnership initiatives of various kinds (discussion groups, market committees, etc.) to develop and implement integrated development plans for the promotion of priority products in Québec and abroad (events, outfitters, golf, 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 these products. The following is a list of cities where Québec has canvassers, showing the markets they cover:

Cities	Target Markets
New York	Atlantic Centre (United States)
Chicago	Midwest (United States)
Dallas	South (United States)
Los Angeles	West (United States)
Paris	France Belgium
London	United Kingdom Netherlands Scandinavia
Vlotho	Germany Austria Switzerland
Tokyo	Japan
Toronto	Canada (excluding the Maritimes) South Korea Taiwan Hong Kong
Montréal	Maritime provinces (Canada) New England (United States) Italy Spain Latin America Australia and New Zealand

Technical Support

Tourisme Québec offers various technical services to tourist oriented 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 certain of its promotional campaigns. By contacting their ATRs, 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 have 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).

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).

Maisons du tourisme Information Centres

Tourisme Québec offers businesses the possibility of advertising in its information 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 (Information centres in Montréal and Québec and at some border crossings).

Video Library

Tourisme Québec maintains an image bank of Québec that companies may rent.

Québec as a Tourist Destination

VOLUME OF TOURISTS (IN THOUSANDS)

Market of Origin	1996	1998	1999	2000	2001
United States	1 920	2 082	2 198	2 257	2 327
New England	552	678	757	815	805
Atlantic Centre	761	682	799	779	835
Midwest	300	347	310	303	293
South	170	220	194	221	245
West	137	156	138	140	149
Other Foreign Countries	1 242	1 180¹	1 268¹	1 315¹	1 150¹
France	390	353 ¹	411 ¹	406 ¹	361 ¹
United Kingdom	118	122 ¹	106 ¹	134 ¹	127 ¹
Germany	107	82 ¹	88 ¹	88 ¹	76 ¹
Japan	65	106 ¹	80 ¹	73 ¹	55 ¹
Sub-total, International Tourism	3 163	3 262	3 466	3 572	3 477
Domestic Markets	15 729	15 519	16 131	17 374	17 968
Canada (excluding Québec)	2 445 ²	2 786 ²	3 095 ²	2 892 ²	2 979 ²
Québec	13 284 ²	12 733 ²	13 036 ²	14 482 ²	14 989 ²
Total	18 892	18 781	19 597	20 945	21 445

1 = Data adjusted by Tourisme Québec based on border crossing results.

2 = Data from 1996 to 2001 is based on Statistic Canada's Canadian Travel Survey. The information is provisional and under review by Statistics Canada.

Source: Statistics Canada

TOURIST SPENDING (IN MILLIONS OF DOLLARS)

Markets of Origin	1996	1998	1999	2000	2001
United States	853	924	1 081	1 147	1 266
New England	168	218	270	293	313
Atlantic Centre	361	308	415	409	455
Midwest	157	162	162	166	184
South	94	138	144	170	202
West	73	98	90	110	112
Other Foreign Countries	959	991¹	1 040¹	1 068¹	977¹
France	369	361 ¹	373 ¹	350 ¹	325 ¹
United Kingdom	55	74 ¹	56 ¹	75 ¹	67 ¹
Germany	64	54 ¹	55 ¹	53 ¹	48 ¹
Japan	52	86 ¹	67 ¹	66 ¹	63 ¹
Sub-total, International Tourism	1 812	1 915	2 121	2 215	2 243
Domestic Markets	2 036	2 376	2 566	3 060	3 289
Canada (excluding Québec)	496 ²	698 ²	735 ²	809 ²	858 ²
Québec	1 540 ²	1 678 ²	1 831 ²	2 251 ²	2 431 ²
Total	3 847	4 291	4 688	5 275	5 532

1 = Data adjusted by Tourisme Québec based on border crossing results.

2 = Data from 1996 to 2001 is based on Statistic Canada's Canadian Travel Survey. The information is provisional and under review by Statistics Canada.

Source: Statistics Canada



Marketing Plan

2002-2003