

MARKETING PLAN

1999 • 2000

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Interior: Composition Orléans

Printing

Cover: Imprimerie Laurentide

Interior: Fonds de reprographie gouvernementale

Legal deposit –

Bibliothèque nationale du Québec, 1999

ISBN: 2-550-34517-7

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FOREWORD

The 1998-1999 marketing plan presents the Québec government's tourism marketing guidelines, strategies and priorities for action. It also describes Tourisme Québec's marketing activities to promote the products and services the agency can provide for the tourism industry and potential partners.

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

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

Maxime Arseneau

Minister for Tourism

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PERFORMANCE

AND OUTLOOK

Since the past points to the future, this chapter presents an overview of Québec's performance in tourism in 1998 and the outlook for the coming year.

■ 1998: a very fruitful year

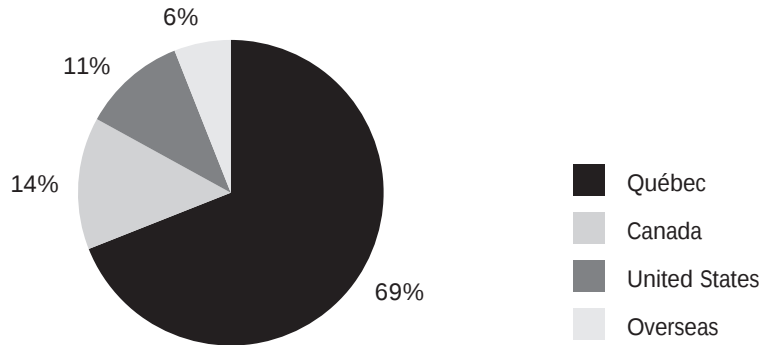
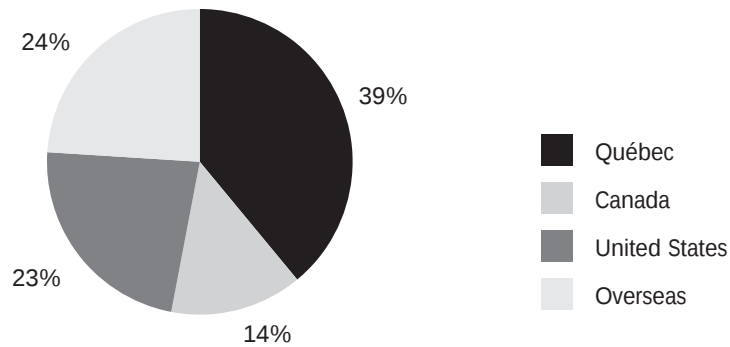
Compared to 1997, from all preliminary indications, 1998 indicates a definite increase in growth. A total increase of 11% in tourism and associated spending is expected from American as well as Québec tourists.

- For the first time since 1990, the number of American tourists visiting Québec has topped the 2 million mark. In fact, the increase in the number of American visitors to Québec in 1998 (8%) was the best of the decade. The same may be true for tourist spending, expected to increase by 16%. Apparently the weaker Canadian dollar, coupled with clever marketing strategy, has paid off.
- Tourism within Québec by Quebecers increased even more, for two reasons: the weakened Canadian dollar and the fine weather. Actually, 1998 was the warmest year of the century, leading to a record decrease in travel to the U.S. of 16%. Since 1996 over 500,000 Quebecers have abandoned U.S. destinations in favour of Québec. The increase in hotel occupancy in 1998 (3.4 points) bears witness to this fact.

These results are even more remarkable, given the unfortunate start of 1998, with the ice storm greatly affecting the Québec clientele and cross-border shopping.

However, this growth tendency did not apply to international markets. In fact, after sustained growth from 1993 to 1996, these markets have remained stagnant since 1997, with clientele decreasing by 3% over the last two years. As far as Québec is concerned, this stagnation is a result of European markets rather than the Asian crisis, which affected Ontario and B.C. to a greater extent. Actually, since 1996 there has been a drop of 6% in tourism from our three main European markets, which represent 50% of our total international customer base.

These encouraging results will certainly contribute toward a large decrease in our tourism deficit of 1998, which should be more than 20% lower than in 1997, in spite of Quebecers' increased spending in countries other than the U.S.

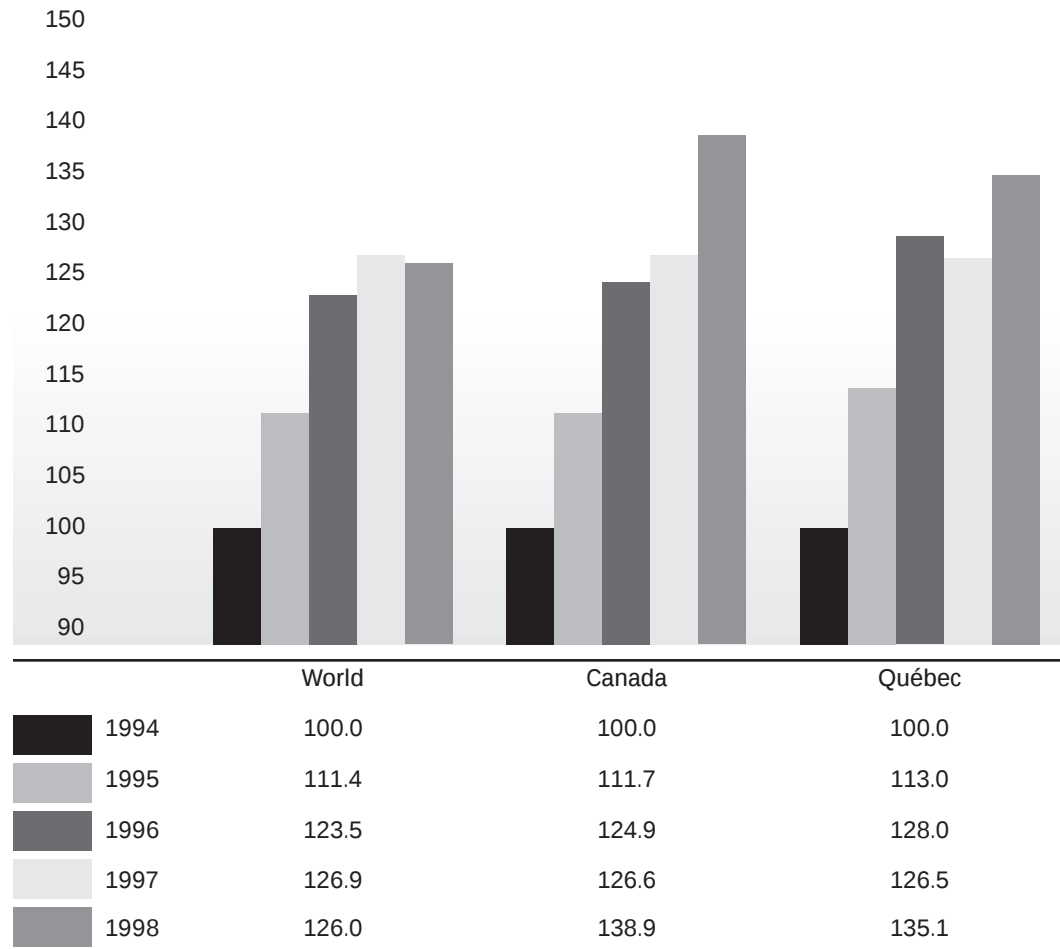
Distribution of the 19 million tourists in 1998*Distribution of the \$4.2 billion in tourism revenue in 1998*

■ Québec is performing well compared to the competition.

Despite the stagnation in other international markets, a phenomenon affecting all of Canada, Québec obtained outstanding results in international tourism in 1998. As shown in the graph on the following page, Québec was above average worldwide and just about average in Canada.

Evolution of international tourism revenue

Indice



Where Québec differs is in overseas markets: Canada-wide, clientele from these markets decreased by 7%; the decrease in Québec was only 2%.

■ 1999: more moderate growth is predicted

According to the Canadian Tourism Research Institute, growth in tourism in 1999 will be less than in 1998. Nonetheless, a productive year is expected, with a 6.1% increase in tourist volume and an 8.1% increase in sales.

GUIDELINES

AND OBJECTIVES

Tourisme Québec proposes broad marketing policies and performance targets for the tourism industry.

2.1 GENERAL MARKETING GUIDELINES

In recent years, Québec's tourism revenue has grown appreciably as a result of appropriate promotional strategies and a favourable competitive situation, notably on international markets. However, in spite of the excellent results obtained in 1998, we still have a long way to go:

- Recent gains were due mainly to the depreciation of the Canadian dollar, a situation which could easily change;
- Developing overseas markets is becoming more difficult, a phenomenon affecting all Canadian tourist destinations. It is these overseas markets which stand to experience the most growth throughout the next decade;
- In Canada, inter-provincial competition is increasing.

Consequently, in 1999-2000 Tourisme Québec plans to adopt a new tourism marketing strategy for the next five years (2000-2005). Since the autumn of 1998, Tourisme Québec has been planning this strategy with the collaboration of a special committee of the **Forum permanent de l'industrie touristique**. The expected goal is to develop a common marketing strategy for Tourisme Québec and the tourist industry in order to ensure a concerted effort in the actions of all partners.

2.2 GROWTH OBJECTIVES

Annual growth objectives in tourist spending established last year are maintained.

- Québec: : 4 %
- Other Canadian provinces: : 4 %
- U.S.: : 3 %
- Other international markets: : 5 %

However, the new 2000-2005 tourism marketing strategy will probably lead to a re-evaluation of objectives next year.

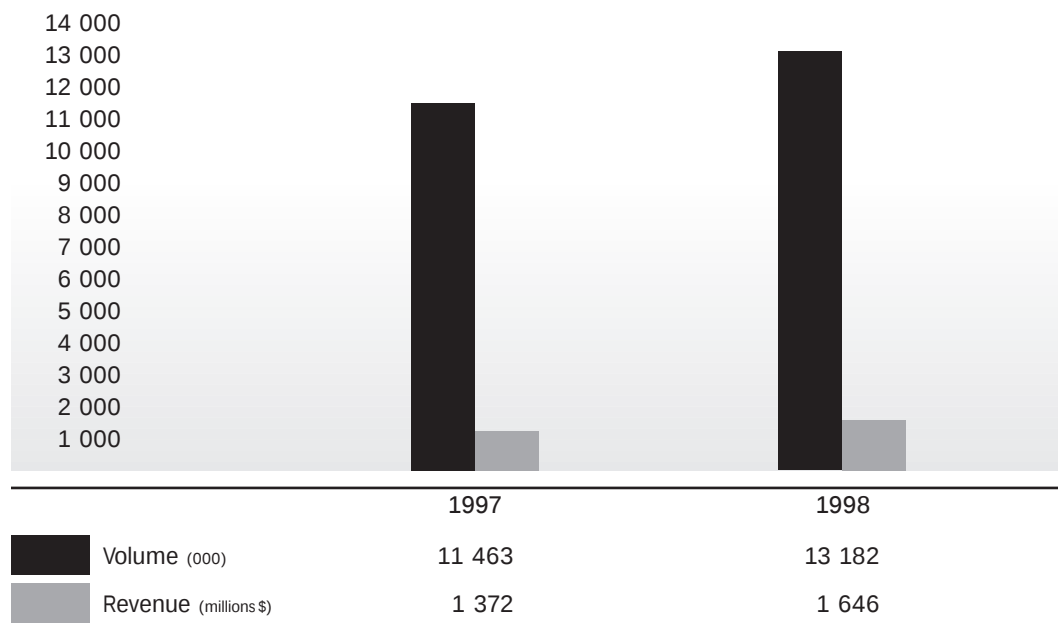
MARKETS:

ANALYSIS AND STRATEGIES

Each targeted market has a unique profile. The following is an overview of the situation, the forces to consolidate and challenges to meet, as well as marketing strategies and objectives that will help the performance of each market.

3.1 THE QUÉBEC MARKET

Market evolution



■ A market in need of renewal

The Québec market is the prime market for Québec's tourism industry, particularly for tourist regions other than Montreal and Québec City. However, the market is fragile: travel decisions are often taken at the last minute. Accordingly, this decision is affected, more here than in other markets, by imponderables that have a considerable bearing on market performance. These external factors include the weather. The exceptional summer of 1995 and the difficult weather conditions in the summer of 1996 had a direct impact on the number of occupied rooms in hotel establishments in certain regions outside Montreal and Québec City. Likewise, the weather conditions in 1998 most likely played a vital role in the significant increase of travel in Québec by Quebecers.

In spite of Quebecers' loyalty to domestic tourism, they can no longer be considered a captive market. Like tourists who visit us from outside Québec, Quebecers have become used to traveling to other destinations. They have become sophisticated tourists.

The Canadian Tourism Research Institute anticipates yet another substantial increase in travel in Québec by Quebecers in 1999. The increase should be 7.5% in terms of volume and 10% in terms of revenue.

Strengths and opportunities

- Packaging of certain tourism products (city tourism, resorts, alpine skiing) significantly improved as a result of the publication of vacation package guides (CAA-Québec, Société des fêtes et festivals, RTAs, etc.).
- Growing interest by non-traditional partners (Visa Desjardins, Hydro-Québec, Rôtisseries Saint-Hubert, Quebecor) in tourism promotion.
- The media profile of certain tourist regions, greatly increased as a result of television campaigns.

Challenges

- Québec's positioning as a tourist destination is too vague and does not place enough emphasis on the depth of Québec's tourism product. The new product is largely unappreciated.
- Harmonization of promotional efforts by various partners (Tourisme Québec, RTAs, private sector) is fragmentary. Promotional effort is unfocused, seriously affecting the return on investment and creating confusion among consumers. Few RTAs have the resources to invest in mass communication tools able to create a significant media impact. The Québec market is the only target market where the cumulative investments by Tourisme Québec and its partners represent a critical mass that is sufficient to create such an impact on consumers.
- The plethora of existing campaigns does not encourage converting travel intentions into purchasing decisions. Advertising is not always backed up by marketing tools.
- Promotion of Québec as a tourist destination among anglophone and allophone clientele is ineffective. This client group accounts for more than one third of the population of the metropolitan region, the largest pool of domestic tourists in Québec.
- Campaigns focus excessively on tourist regions rather than natural regions, grouping of similar tourism experiences and the promotion of tourist experiences currently exported on international markets.

- Promotional campaigns do not make sufficient allowance for the segmentation of client groups, and, in general, changes in habits (example: short stays) and values among Québec customers.
- Promotional efforts are too highly concentrated in the summer. The potential of winter and fall is underdeveloped.
- Interprovincial competition is intensifying:
 - The number of Québec tourists traveling to New Brunswick increased by 27% between 1996 and 1998 as a result of an intensive advertising campaign by that province in Québec (investment of \$1.3). Québec now surpasses Ontario as the main “non-Atlantic province” supplier of tourists to New Brunswick. Pleased with this success, New Brunswick will continue its campaign in 1999.
 - The Canadian Tourism Commission is encouraging residents of the Toronto, Montreal and Vancouver regions to travel within Canada.

■ Strategies and priorities for action

Objective

To renew interest in choosing destinations

Positioning

Holidays in Québec are highly satisfying, owing to the diversity of activities available. The objective is to position Québec as a modern and trendy destination.

Target markets

Metro Montreal and Metro Québec

Target clientele

25-54 age bracket

Incomes of \$ 50,000 and over

Theme

“ Les vacances au Québec, c’est l’idéal ”

“ Québec, it’s just perfect ”

Marketing strategy

Advertising

- Launch a new TV campaign with three 30-second spots, alternating French-English in summer and French only in winter. Several different tourist regions will be showcased.
- Promotional partnerships with the RTAs of Saguenay-Lac-Saint-Jean and the Gaspé, and Ultramar, as well as the Association des stations de ski du Québec for the winter portion.
- Promote the national winners of the Grands Prix du tourisme québécois (tourism awards of excellence) with a promotional insert in a run of 1,800,000 copies published in partnership with Fêtes, festivals et attractions and with advertising spots telecast by Météo Média.
- The “Vélo mag ” television program in collaboration with Vélo Québec and the Association des producteurs de lait du Québec.

Press relations

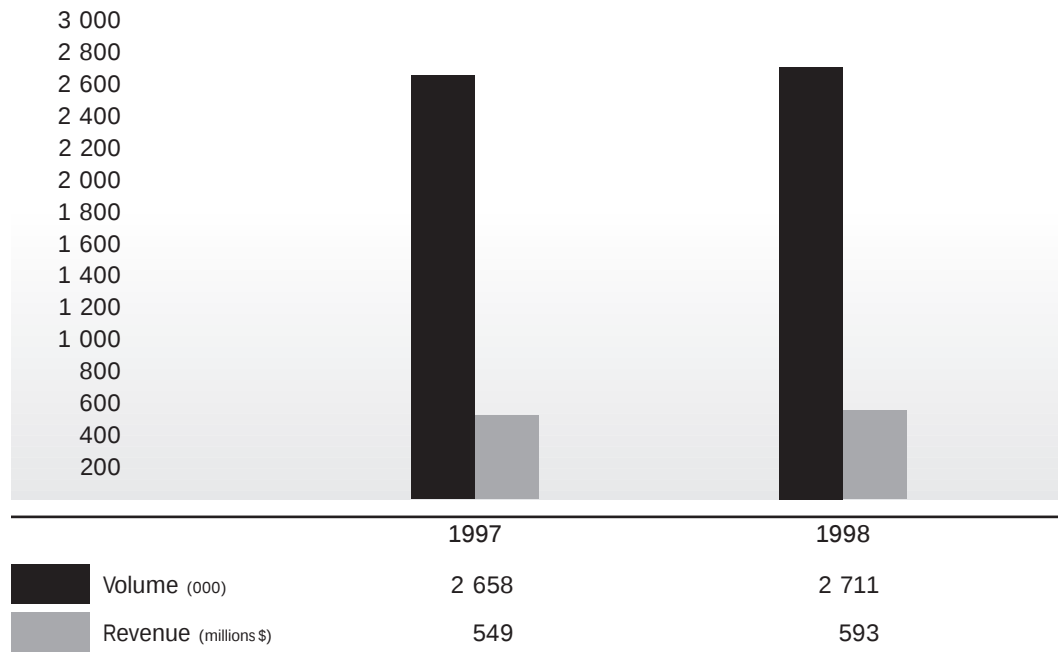
- Maintain close personal contact with tourism reporters.
- Publish an informative bi-weekly booklet and four quarterlies.
- Organize group and individual tours for members of the media.
- Organize a media event during the Salon vacances et loisirs d'été in Montreal.
- Participate in press conferences with regional partners and industries.

Distribution

- Distribute tourism products through the ACTA Vacances Québec network.
- Support the distribution in a million homes of a pamphlet describing all-inclusive tourist packages produced by CAA-Québec (Club automobile du Québec).

3.2 THE NORTH AMERICAN MARKET

3.2.1 The Canadian Market

Market evolution

■ A market concentrated in Ontario and well-disposed for visits to Québec

Québec has the advantage of being adjacent to Canada's largest tourist-producing market, Ontario. Ontarians account for the largest number of visitors to Québec by far: they made up more than 80% of the number of tourists and accounted for more than 65% of total spending by Canadians in Québec. Like Québec customers, Ontarians are relatively familiar with Québec's traditional products and are faithful to Québec as a tourist destination.

Strengths and opportunities

- Québec enjoys a good reputation in Canada, particularly in Ontario because of its proximity and the quality of its tourism products, such as skiing, city tourism and resorts. Of all the external markets Québec targets, Ontario displays the highest propensity to travel to Québec.
- Québec's proximity, good connections between Toronto and Montreal (one hour by plane, five hours by car, four hours by rail) help to sell short, frequent stays. This type of tourism is currently in vogue.
- Québec's bureau in Toronto provides the tourism industry with significant assistance in marketing its tourism products.
- The large anglophone and allophone community in Québec encourages Ontarians to travel to Québec (visits with family and friends).
- Québec enjoyed excellent press coverage last year. The publicity value of articles on Québec rose from \$20 to \$28 million.
- The CTRI forecasts a 2% increase in travel by Canadians to Québec in 1999 and an 8% increase in revenue.

Challenges

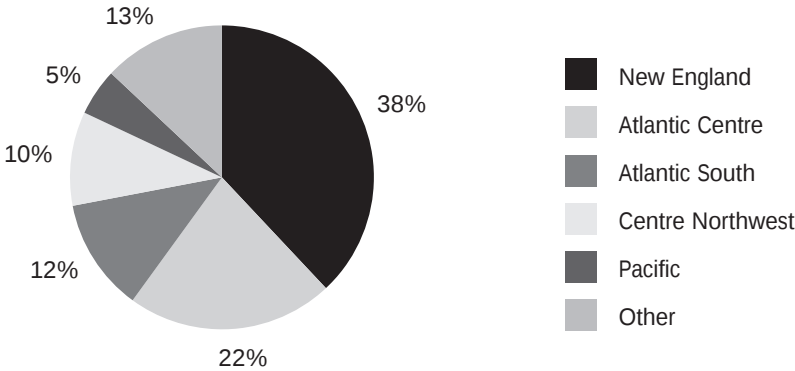
- Promotional investments by Tourisme Québec and the tourism industry on this market continue to be modest, particularly in advertising.
- Toronto and Vancouver are putting up strong competition for business decision-makers.
- More emphasis could be placed on promoting specific tourism products.
- Two thirds of the Ontario clientele comes from the eastern region (Ottawa-Cornwall). The Toronto area, with 4.5 million consumers, is greatly under-exploited.

■ Strategies and priorities for action

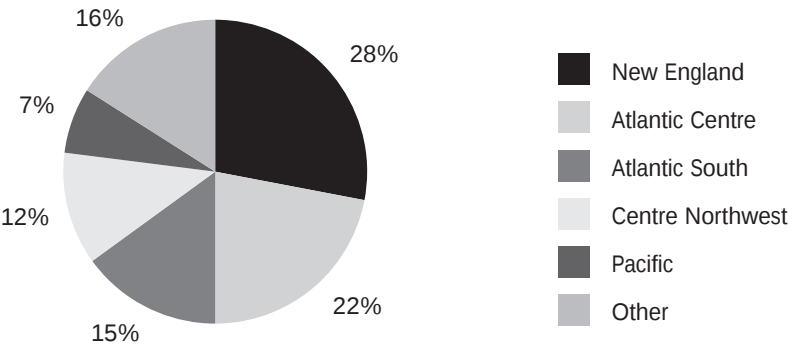
The marketing strategy for the Canadian market is the same as for the American market, since the North American promotional campaign targets both the Canadian and American markets. Some priorities for action that are more specific to the Canadian market will be described in this section on the American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

3.2.2 The American Market

Source of 2 million American tourists in 1998

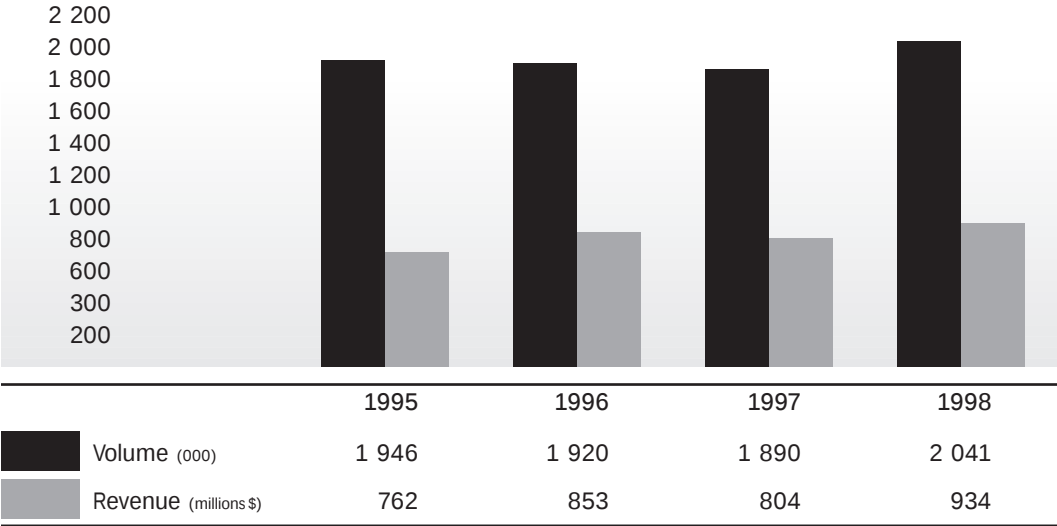


Source of \$934 M tourist dollars in 1998



■ A demanding market with enormous potential

Market evolution



- In terms of volume, American tourism in Québec evolves cyclically, declining from 1991 to 1993, growing from 1993 to 1995, declining from 1995 to 1997.
- The CTRI is predicting another productive year of American tourism in 1999. The number of tourists should continue to increase (5.1%) and spending should increase by 9%.

Strengths and opportunities

- The growing promotional partnership with Québec and American partners (RTAs, Air Canada, AT&T, Hertz, CP Hotels, GoGo Tours, Yankee Holidays, Northwest Airlines, Radisson, Delta Vacations, Liberty, Collette Tours, USTOA, American Airlines Vacations, etc.).
- The two vacation package booklets (summer and winter) produced since 1995 are encouraging American consumers to purchase Québec tourism products.
- A monthly fax sent to more than 10,000 travel agents (Québec Travel Info), helping to make the American distribution network aware of Québec's tourism.
- The publicity value of travel articles on Québec, reaching \$37 million, up 28% compared to 1997. The visibility achieved through press relations offsets the relatively small amount of our promotional investment on this market.
- Tourisme Québec's large file of customers for direct marketing (250,000 mailings a year).
- With an expanded team of canvassers in distant markets with growth potential, Tourisme Québec has laid the foundations for a promotional strategy which should pay off in the medium and long terms.
- Continuing improvement in customer service for Americans requesting tourist information.
- American tour operators' showing interest in new products, particularly individual travel.
- Québec's tourism industry now acknowledging the contribution of the distribution network and more willing to pay commissions to agents. The fierce competition among airlines means that travel agents will play a strategic role in the sale of travel packages.
- Markets are becoming fragmented and new customer segments are emerging. Markets expected to experience strong growth are the Hispanic market, the gay market and the seniors market, which will become increasingly segmented.
- The Open Skies agreement, leading to improved service between Montreal and American cities, essential for the development of distant markets. With the final phases of the agreement in effect, it will be possible to consolidate gains and eventually increase the number of connections.
- Turning to business tourism:
 - To improve our telemarketing efforts, a database of corporate clients (the conventions and business meeting market) was set up in 1997-1998.
 - The outlook for the conventions and business meeting market is very good for the next few years. American companies have entered a consolidation phase and emphasis is being placed in staff training; 58% of American companies expect to hold business meetings outside the United States.
- The U.S. economy is thriving: unemployment is the lowest it has been in 24 years and consumer confidence is high.

Challenges

- Americans know Montreal and Québec fairly well, but they know little of the other tourist regions throughout Québec.
- Certain prejudices concerning Québec (language, cold winters, cost of living) sometimes thwart our efforts at promoting destinations.
- Tourism products offered to the general tourist clientele are too traditional. There is little promoting of eco-tourism (resorts) and cultural heritage.
- Certain niche markets remain underdeveloped. There is a high rate of repeat business among American customers. This situation threatens Québec's long-term performance on this market.
- The Québec tourism industry's interest in this market has been equivocal.
- The strong American dollar makes Québec very competitive, but this is not recognized by customers who, regardless of the advantage, see our products as expensive (quantity/quality/price).
- Most Americans have only two weeks for their annual vacations and accordingly are highly selective about their vacation destination.
- The United States is the world's largest tourist-producing market. It is intensely solicited by all tourism destinations, including individual states which will invest almost \$200 M in 1998-1999 to promote domestic tourism.

■ Strategies and Action Priorities

Objective

To target geographic markets to greater advantage

Positioning

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

- Urban tourism
- Tours
- Resort stays
- Outdoor adventure
- Hunting and fishing
- Downhill skiing, cross-country skiing and snowboarding
- Snowmobiling

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

Target markets

Canada/Primary markets	– Ontario
Canada/Secondary markets	– The Maritimes
U.S./Primary markets	– New England – Mid-Atlantic states
U.S./Secondary markets	– South-Atlantic States – Central Northeastern states – Pacific states

Target clientele

MARKETS	CUSTOMERS	INDUSTRY
Canada	– 35-54 age bracket	– tour operators
U.S./Primary	– Salary in excess of \$75,000	– travel agents – automobile clubs
U.S./Secondary	– 55+ age group – salary in excess - of \$75,000 -	– tour operators – travel agents – automobile clubs

Theme

All promotional files are grouped together under # 1 800 at Tourisme Québec and at the Internet site “ Bonjour Québec ”.

Marketing strategy

Publicity

The Tourisme Québec campaign will have two phases:

- Summer/fall: marketing from May 1999 to July 1999
- Winter: marketing from September 1999 to March 2000

Means of communication used in this campaign:

- Brochures
- Magazines for customers
- Magazines for industry
- Daily bulletins
- Television
- Faxes to industry professionals
- Direct marketing
- Mailing tourist information
- The Internet

Following is a provisional résumé of the means of communication used by Tourisme Québec and its participating partners for the Summer 1999 period:

- Printing of a pamphlet (1,600,000 copies);
- Promotional inserts in consumer magazines (some 1,000,000 copies);

- Publicity in magazines for the industry to elicit demand from travel agents and automobile clubs;
- Ads in major American newspapers;
- Television: telecasting a message specific to certain products on some American networks;
- Faxes to professionals of the industry: monthly faxes with information for over 8,500 travel agents and automobile clubs as well as 1,500 tour operators and tourism reporters;
- Direct marketing: mailing 125,000 copies of promotional material to established target clientele;
- Mailing tourist information: responding to requests for pamphlets from Tourisme Québec and its partners;
- Promoting participating partners on the Tourisme Québec Internet site.

For the winter phase, Tourisme Québec will present a campaign proposal in the form of a partnership.

Press relations

Canada

- Maintain close and frequent contact with the media mainly through press breakfasts and special promotions.
- Coordinate individual and group tours for the press to various regions of Québec with emphasis on media tailored to target clienteles.
- Assist in the organization of the annual convention of the Canadian, Atlantic and Caribbean branches of Society of American Travel Writers (SATW) to be held in Québec; organize pre- and post-convention tours.
- Participate in the annual Travel Media Association of Canada Convention.
- Continue publishing the bi-annual newsletter *Québec Trip Talk*.

U.S.

- Coordinate individual and group press tours to various regions of Québec with emphasis on media tailored to target clienteles.
- Participate with Air Canada in press conferences in Chicago, Boston and Philadelphia.
- Participate in the Media Marketplace organized annually by the Canadian Tourism Commission.
- Participate in the annual convention of the North America Ski Journalists Association.
- Participate in the annual convention of the Eastern Ski Writers Association.
- Participate in the annual convention of the Society of American Travel Writers.

Distribution

Canada

- Approach new tour operators open to offering innovative packages in Québec.
- Intensify promotional efforts with high-potential client groups and identify new niches within the seniors market.
- Work closely with the CAA and the motor coach operators.
- Continue to support wholesalers, particularly for the distribution of skiing products.

- Carry out an extensive telemarketing operation targeting the business meeting and incentive travel market.

U.S.

- The Tourisme Québec sales team, located in four American cities, promotes markets prioritized by Québec.
- Follow up on the *American Travel Agents Accreditation Program* started last year. The first annual convention to bring together licensed agents will take place at Mont Tremblant next May. This year's theme will be consolidation, with the accent on harmonizing the geographic distribution of licensed agents and the training of agents within charitable agent organizations (consortia).
- Promotional efforts geared to the gay clientele will be maintained. Joint partnerships with other destinations in secondary markets with great potential for these clients are under study.

Setting up travelling workshops for *nonprofit in travel* agencies.

Soliciting in market niches such as amateur gardeners and horticulturists.

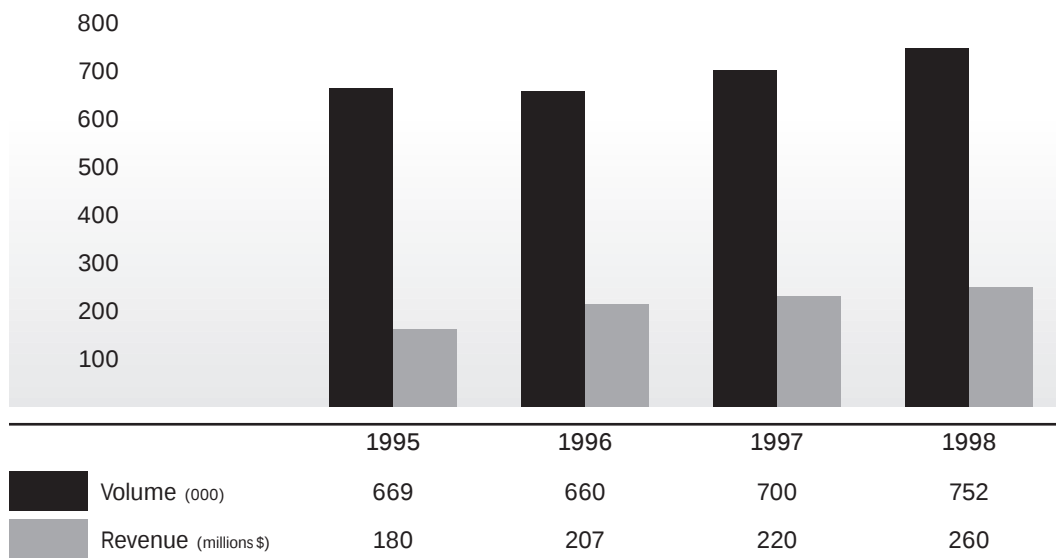
■ Primary markets: in need of renewal

Customers in these markets are the most familiar with Québec as a tourist destination. However, to renew their interest, they have to be made aware of the variety of tourist products in Québec. Demographic growth in the primary markets is lower than in the Sun Belt states, but they still participate in our southern neighbour's booming economy.

NEW ENGLAND

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

Market evolution



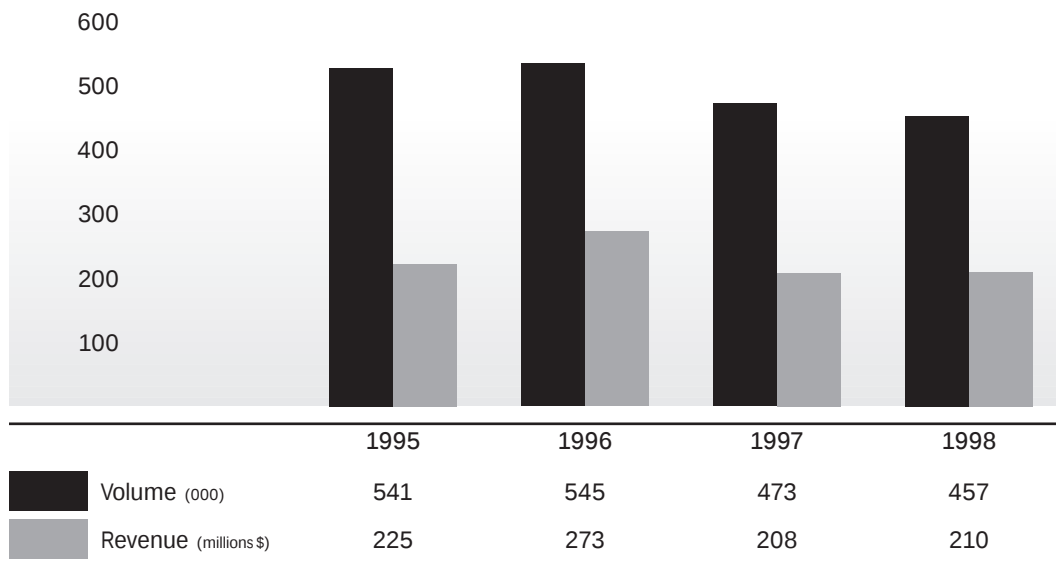
- The New England submarket has the potentially highest volume of visitors to Québec. It is the only region in the U.S. where more tourists visit Québec than Ontario. However, with a population of 13 million, it is the least populous region in the U.S.
- This traditional Québec market has performed well since 1992: strong growth from 1992 to 1994 followed by a slowdown in 1995-1996. However, in 1997 this region contrasted with the general trend in the American market: the number of tourists and the amount they spent in Québec rose substantially.
- For 1999, the CTRI is predicting an increase of 3.5% in Québec travel and 7.5% in sales.

Priorities for action

- Intensify press relations.
- Give priority to markets in Massachusetts and New Hampshire.
- Identify market niches (associations, clubs, tour operators) for the following products: hiking, cycling, nature observation, garden visits, golf, concerts/operas/museums.
- Build a database on corporations holding business meetings outside the United States and identify companies organizing incentive trips.

CENTRAL ATLANTIC STATES (New York, Pennsylvania, New Jersey)

Market evolution



- Located farthest from Québec, the Central Atlantic secondary market is traditionally the best for Québec in terms of tourism sales. However, since 1997 New England has eclipsed Atlantic Centre in this field. This market remained fairly stagnant in 1998.
- In this secondary market, Ontario is our biggest Canadian competitor. Ontario's market share in 1996 was 66%, compared to 19% for Québec,
- For 1999, the CTRI is predicting an increase of 3% in Québec travel and 8.7% in sales.

Priorities for action

- Raise our visibility with the consumer.
- Continue canvassing activities with tour operators and ski clubs.
- Intensify our presence with seniors clubs.
- Intensify and further target press relations.
- Begin promoting new products.
- Continue information and training initiatives with American travel agents.
- Approach new market segments (Hispanics, African Americans, pilgrims, horticultural societies, gays, etc.)

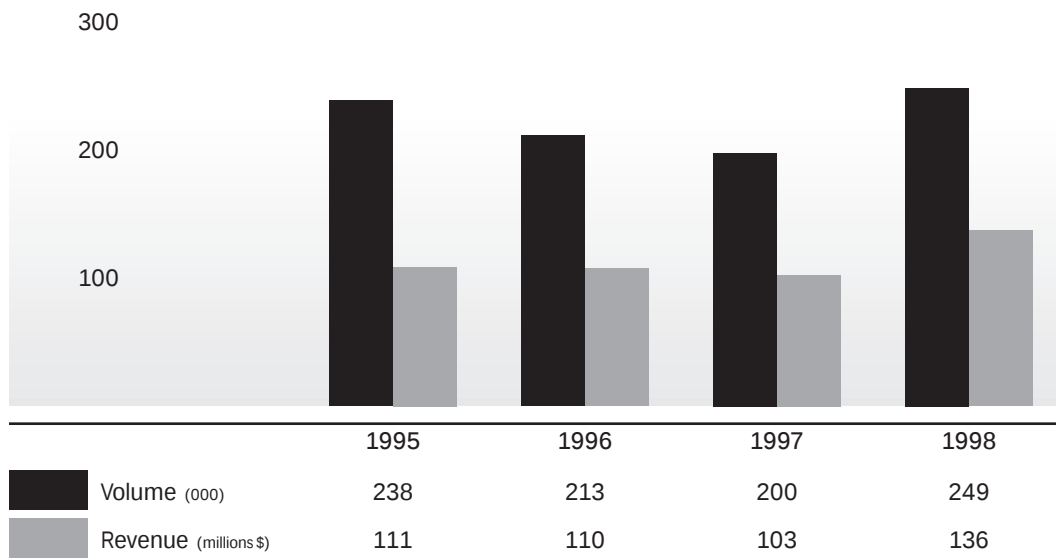
■ Secondary markets: lucrative opportunities

These are indisputably the markets of the future, with strong economic and demographic growth potential. Large companies are moving there, as are retirees looking for a milder climate. Tourists from these regions tend to travel by air rather than by car to visit Québec. They stay longer and spend more.

THE SOUTH ATLANTIC STATES

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

Market evolution



- This secondary market grew enormously from 1993 to 1995 in terms of tourist numbers and sales. After a slump from 1995 to 1997, relief was on the way in 1998.
- In spite of the Open Skies agreement, development of this submarket is hampered by the lack of direct flights between many large cities and Québec, though the situation is improving.

- Ontario is Québec's biggest competitor in this region: in 1996, it held 46% of the market in Canada compared to 16% for Québec.
- The CTIRI forecasts that the number of tourists to Québec from this region will rise 6% in 1999, and that their spending will increase by 3%.

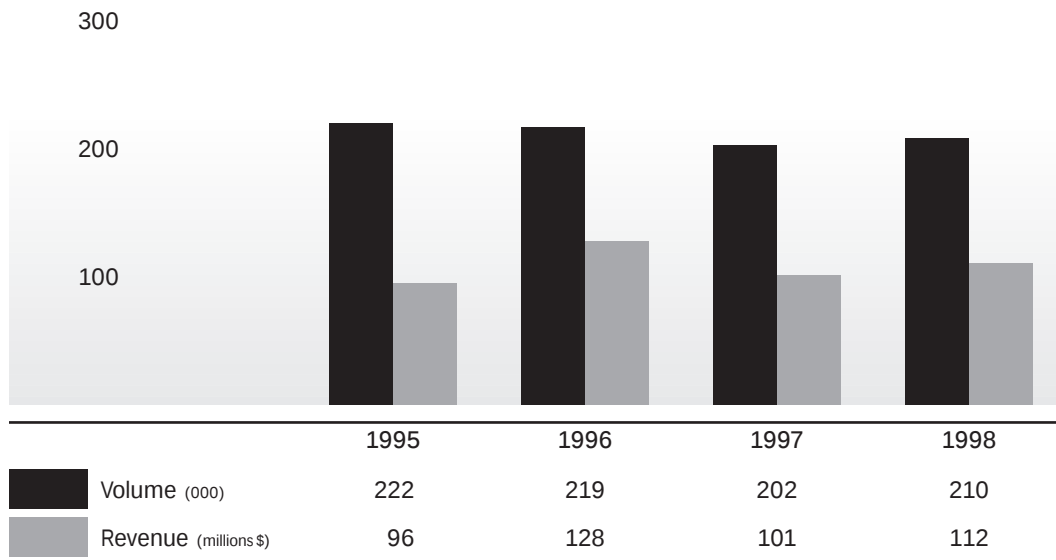
Priorities for action

- Continue to raise Québec's visibility with the distribution network through a range of representative activities.
- Continue telemarketing in the leisure and business tourism sectors.
- Intensify press relations activities and coverage on the radio.
- Consolidate joint promotion agreements with tour operators.
- Follow up on our request from travel agents for information and destination training of agents.

THE NORTHEAST CENTRAL STATES

(Wisconsin, Michigan, Illinois, Indiana, Ohio)

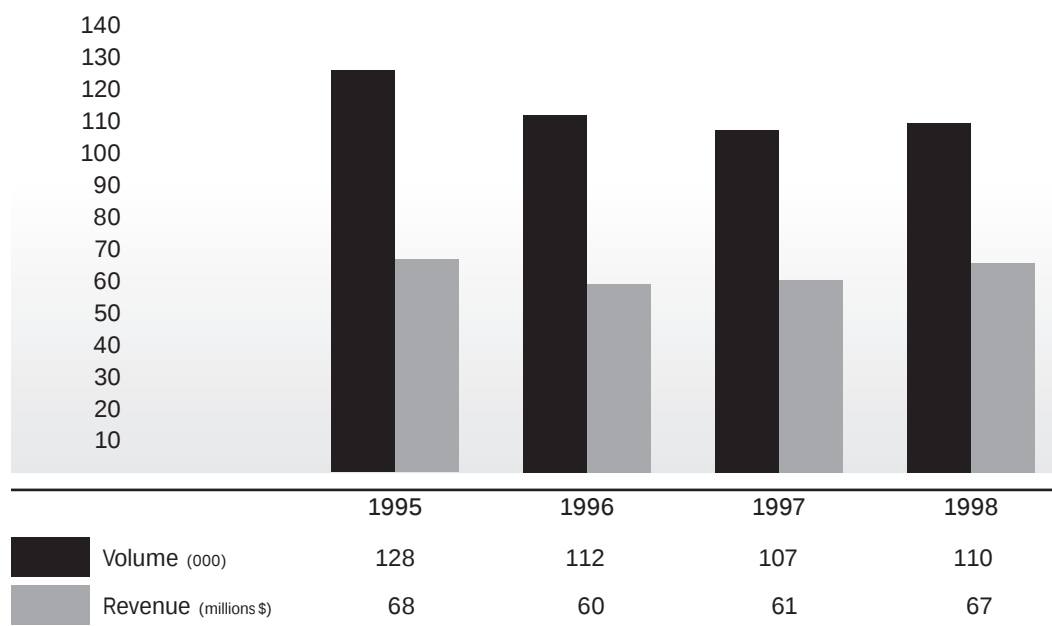
Market evolution



- This secondary market stands out for its continued stability since 1994.
- It is the American region that provides the largest number of tourists to Canada: in 1996 Americans from the Central Northeastern states represented 3.5 million provincial visits in Canada. Ontario collared 80% of this market while Québec was left with a mere 6%.
- This region is second in the U.S. in terms of the number of national and international companies with head offices there. The incentive travel business also flourished there.
- For 1999, the CTIRI is predicting an increase of 8.5% in trips to Canada and 13% in sales.

Priorities for action

- Carry out a range of representation activities to increase the level of recognition of Québec in the distribution network.
- Intensify press relations activities.
- Leisure tourism: target automobile clubs, group influencers (skiers, seniors).
- Continue our telemarketing campaign in the leisure and business tourism sectors and build a database for these sectors.
- Explore new market niches (such as bank groups) for leisure tourism in the region.

*PACIFIC STATES**(California, Oregon, Washington)**Market evolution*

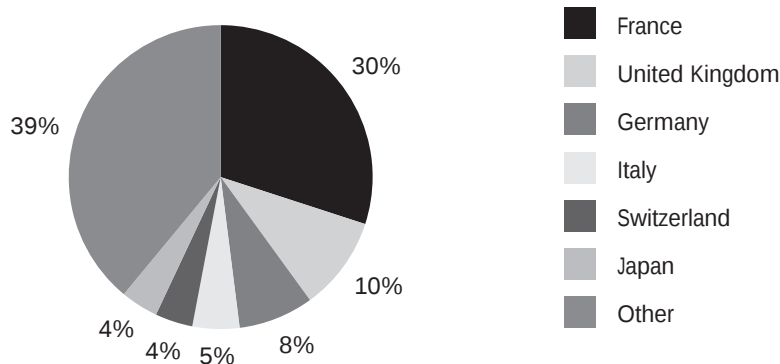
- There has been little change in the Pacific market over the last five years in terms of both volume and revenue.
- Québec's share of the Canadian market is 4% behind Ontario's (11%) and British Columbia's (69%).
- Compared to other Americans, people in this region show the highest propensity to travel outside the United States. They seek out novel and active tourism experiences.
- California has emerged from a difficult economic period and is recovering strongly.
- In 1999 the CTRI forecasts that the number of tourists to Québec from this region will rise 8.5%, and that their spending will increase by 13%.

Priorities for action

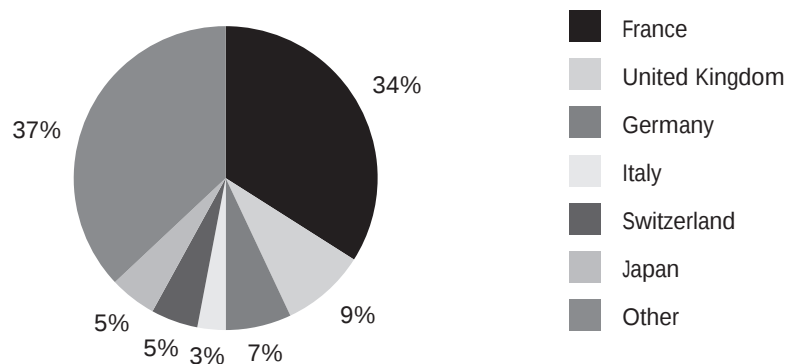
- Continue to work with Canadian partners (CCT, Air Canada, CP Hotels, etc.) to promote Québec.
- Television promotion: continue to work with our current partners (Travel Related Marketing, Associated Television International) and explore new projects in this field, both radio and TV.
- Continue direct marketing using three existing databases.
- Intensify press relations activities.
- Intensify representation activities with potential clients in the incentive travel and business meeting sector.
- Continue to develop the process to inform travel agents and make them more aware of Québec as a tourist destination.
- Intensify business relations with tour operators on the west coast.
- Promote Québec as a tourist destination among alumni groups and museum friends.

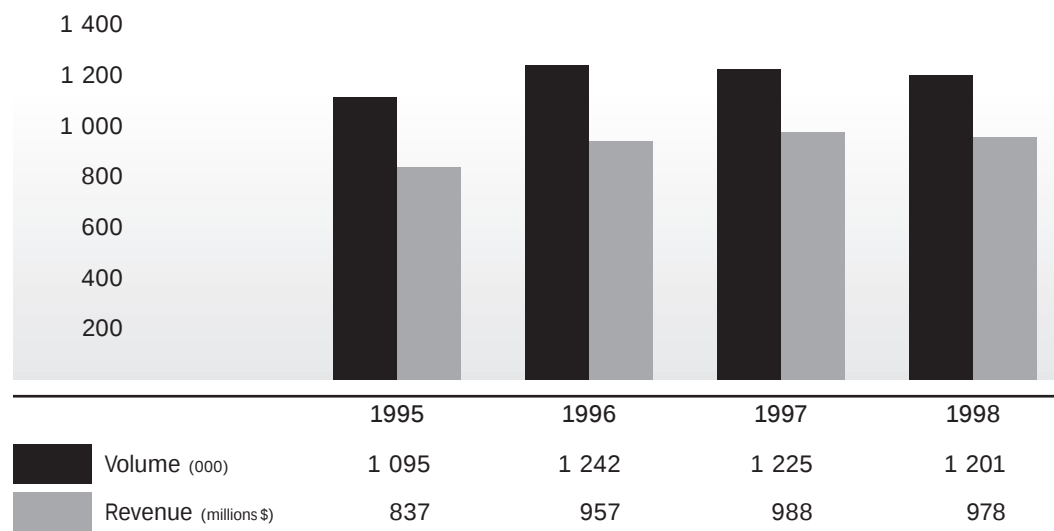
3.3 OTHER PRIORITY INTERNATIONAL MARKETS

Distribution by country of the 1.2 million tourists in 1998



Distribution by country of \$978 million in tourism revenue in 1998

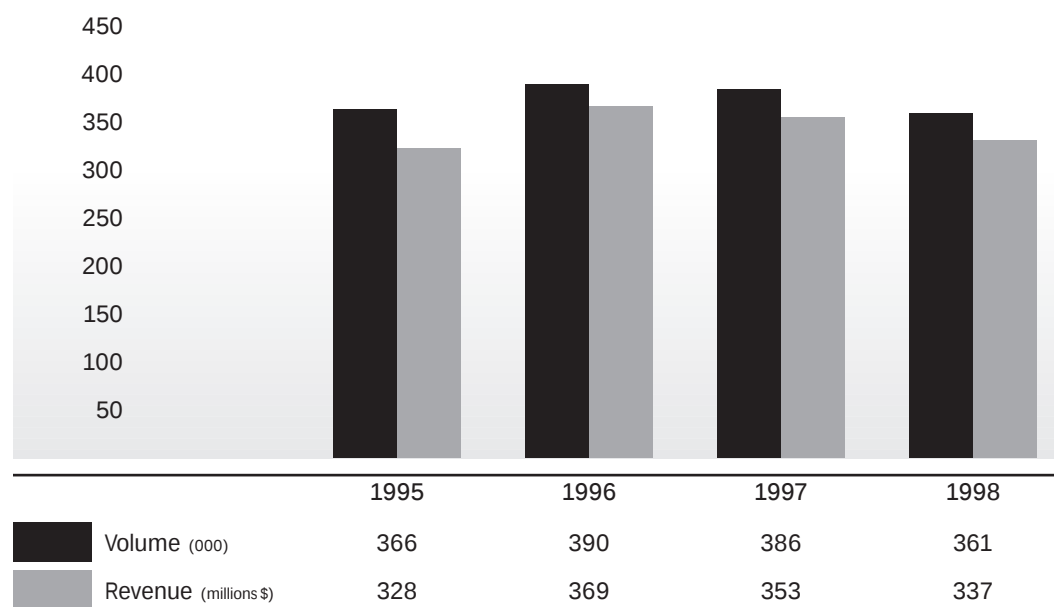


Market evolution

Other priority markets are the ones showing the most growth since 1992. However, since 1997 certain stagnation is evident in the number of tourists as well as tourist spending. For 1999, the CTRI is predicting renewed growth in these markets. A 2% rate of growth is expected in the number of tourists as well as a 5.5% increase in spending.

3.3.1 France

■ A tourism market reaching a ceiling

Market evolution

- The French market represents the best of the European markets for Québec. The number of tourists and tourist spending increased continuously from 1990 to 1997. In 1998 this market made up 30% of the total number of international tourists (except for Americans) and 34% of their spending.
- However, since 1997, after 12 years of continuous growth, the number of French tourists visiting Canada has decreased. This tendency was confirmed in 1998, when the number of French tourists decreased by 6.5% in Québec and 9.3% Canada-wide.
- Québec is maintaining its dominant position in Canada in terms of the clientele from France.
- French tourists form a lucrative clientele as they, along with the Belgians and the Swiss, tend to stay in Québec longer (10 overnight stays on average).
- The habits of French tourists in Québec differ from those of other international visitors:
 - Half of them stay in at least two types of accommodation during their visit, compared to 28% for other international tourists.
 - Of all international tourist groups, they are the most frequent visitors to regions outside Montreal and Québec;
 - The French clientele is not seasonal, and demonstrates a passion for winter. Of all international clienteles, it is the French who prefer winter the most.
- Recent studies have confirmed the extraordinary potential of the French market. It is estimated that some 9 million French tourists will show interest in visiting Canada sometime over the next three years.
- For 1999, the CTRI is predicting that the volume of the French market will remain stable within 0.3%, while tourist spending will increase by 5%.

30

Strengths and opportunities

- Québec's excellent visibility, thanks to media attention as a destination. In 1998 over 200 articles and features were published, coordinated by Tourisme Québec. The publicity value of these articles translated into some \$23 million in 1998.
- Québec's relatively high profile, thanks to multipromotional campaigns (the press, infomercials) produced in cooperation with the CTC and tour operators. These campaigns have produced excellent results at relatively little cost.
- Québec's high profile in France during the "Printemps du Québec" promotion.
- Excellent cooperation with tour operators and bus companies (Vacances Air Transat, Vacances Air Canada, Canada 3000 Aventure, Sabena).
- Québec's representation in the off-season and winter programs offered by tour operators. Some 40 of them include Québec in their winter packages.
- Adventure/Nature products that occupy a very important place in tour operators' programs.
- The growing demand for incentive seminars, especially in winter.
- Québec's high profile in regional tourist fairs, reaching a large number of consumers in regions with high potential.
- More and more travel agents requesting information, thanks to the monthly fax entitled "Québec en bref" in France, and periodic mailing of similar letters to Belgium.
- Consumer satisfaction with the information services available to them (Freephone – toll-free numbers – fulfillment centre, Minitel, Internet). The satisfaction rate among consumers is presently very high. More and more telephone calls for information are being received.

- Québec's many attractions, especially appreciated by the French clientele: language, hospitality, exotic locales, wide-open spaces, environmental concerns, North American lifestyle. The French tourists want active holidays in exotic locales with the local population.
- The increasing popularity of Québec. More and more interest is shown by higher-spending individuals rather than by groups. Individual clients now make up nearly two-thirds of the market.
- Québec's better value for money.
- Long-distance holidays on the rise.
- Faster development of the Belgian market, now much easier with Sabena's new Brussels-Montreal route (4 flights per week) in addition to chartered flights offered by Air Transat and Canada 3000.
- French tour operators' and travel agents' familiarity with the destination and the products.

Challenges

- Québec must blazon its image in France to dispel the confusion between Québec and Canada.
- Advertising budgets are limited, necessitating partnerships in the private sector.
- It is difficult to reach individual clients in the off-season, except during school holiday periods.
- France remains the main challenge for the tourist dollar, given the new high profile competitors like Thailand, Egypt, South Africa, India, The Reunion Islands, Australia and China, all with huge financial resources at their disposal.
- Québec must increase its visibility at consumer shows, especially in cooperation with Québec institutions (RTAs, Bureaus).
- The tourist industries in France and Canada are a little unhappy about certain price-cutting tactics exercised by some.

■ Strategies and priorities for action

Objective

Increase the number of French and Belgian visitors and the tourism revenue generated by these markets.

Positioning

Québec is a destination where interpersonal relations, human experience and interesting adventures lead to enrichment in summer, winter and fall.

Target markets

Paris and surrounding areas, as well as other areas with great potential (Rhône-Alpes, Alsace, The Northwest, Provence).

Target client groups

Consumers with significant disposable income

Consumers who travel in the off-season

Tour operators (pleasure tourism and incentive tours)

Distributors (travel agencies)

Theme

Summer: “**Le Québec, la fête grandeur nature**”

Winter: “**Le Québec, l’hiver à l’état pur**”

Marketing strategy

Advertising

- Participation in the cultural event “Le Printemps du Québec” (advertising in the season's program, advertising in metro Québec and surroundings, tourist information available at cultural events, press releases, visibility in magazines published in twin cities like Bordeaux, Lyon, Strasbourg and Lille.
- Re-broadcasting infomercials in the spring with the same 1998-99 partners, Air Canada, the CTC and Ontario Tourism.
- Advertising campaign in Paris metro trains and radio ads (Bordeaux, Lyon, Mulhouse, Marseille, Toulouse) in cooperation with Vacances Air Transat.
- Campaign in the print media (*L'Express*, *Voyager Magazine*, *Ouest-France*, *Le Figaro*, etc.) to reach a wider public.
- Presence at the Foire de Caen (The Caen Fair).
- Promotions in collaboration with city hall in Paris.
- Increased and better-quality presence in consumer shows.
- Direct marketing campaign targeting French and Belgian tourism professionals.

Press relations

- Group and individual press tours emphasizing emerging products (soft adventure, aboriginal adventure, Québec through music, etc.), and the off-season.
- Welcoming journalists at the Festival international de la météo.
- Welcoming some 20 eminent food critics.

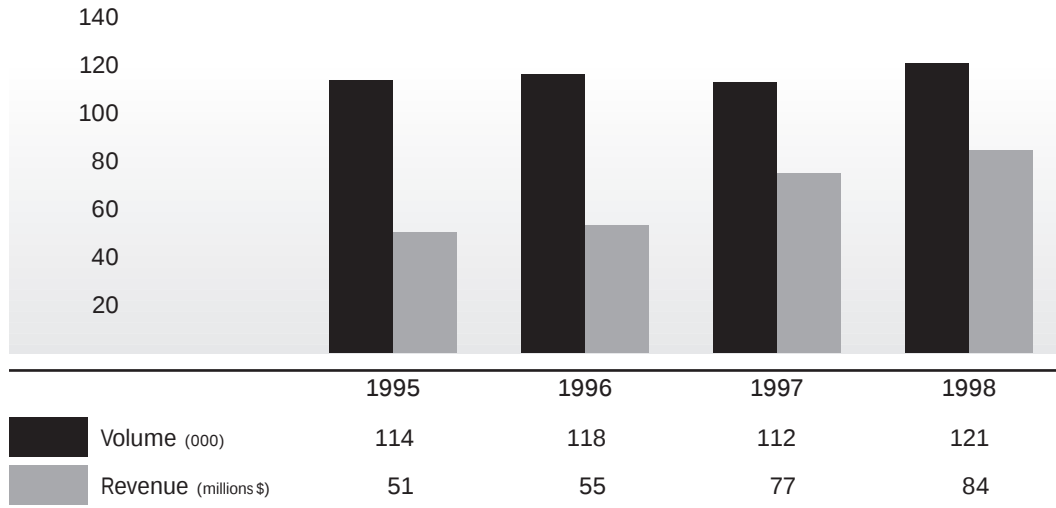
Distribution

- Support commercial opportunities arising from the distribution network.
- Personalized visits to the largest tour operators and incentive travel agencies.
- Participation in major fairs and markets in France and Belgium.
- Arranging a meeting with incentive seminar specialists.
- Organizing information sessions for Belgian incentive travel agencies.
- Seminars presenting Québec as a choice (Incentive) destination in cooperation with Canadian Pacific Hotels.

3.3.2 The United Kingdom

■ A growing market

Market evolution



- The British market has grown considerably since 1993. Even though the number of tourists has remained stable, their spending has risen by 60%.
- In 1998 the number of British tourists visiting Québec increased by 8%, while the Canada-wide increase was only 1.2%.
- Even so, with less than 10 % of British tourist spending in Canada (1996), Québec has by no means exhausted this market potential.
- For 1999 the CRTI is predicting a slight growth in the British market: 1% in volume and 2.5% in spending.

Strengths and opportunities

- An increasing number of tour operators showing interest in Québec. Tourism products are more diversified (urban tourism, winter activities etc.), allowing for longer stays and a lengthened tourist season. These factors have contributed to increased sales to tour operators.
- While Toronto is the chief gateway for British tourists to Canada, more than 80% of those who visit Eastern Canada spend time in Québec.
- Québec's growing reputation in the British press. The publicity value of articles and features on Québec reached \$27 million in 1998.
- Partnership with the CTC and other provinces (Ontario, Nova Scotia), for television and print medial advertising campaigns, proven to be very effective.
- Québec operators' becoming increasingly proactive on the British market.
- The United Kingdom has one of Europe's lowest rates of unemployment, but consumers remain cautious and are very price-conscious.

- Long haul travel, claiming a growing share of the market in the United Kingdom.
- Since the summer of 1997, Air Canada has increased its service to Montreal. Tour operators welcomed the transfer of international flights from Mirabel to Dorval.
- In the summer of 1999, Canada 3000 will increase its number of flights to the United Kingdom.
- With the growing reputation of Québec as a destination, the number of individual trips will increase at the expense of group travel.
- Some products offered by Québec have a promising future: short stays in the city, stays in small inns, nature activities, winter products. The future lies in tailored packages offering a variety of activities. With the emergence of Mont Tremblant on the scene, tour operators are showing greater interest for the adult skier segment, since the student skier markets for Mont Tremblant and Mont-Sainte-Anne are already well developed. The youth segment offers other attractive prospects (holiday camps).

Challenges

- Canada and Québec are still seen as cold and dull, offering little to do. However, this misperception is changing.
- Québec's image is not as strong as that of Western Canada.

■ Strategies and priorities for action

Objective

To consolidate market growth

Positioning

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

Target markets

Consumers who have visited Canada previously and prefer individual travel.

Families seeking a mid-range product.

Young people (25 years +) seeking an active vacation.

Consumers over 50 are looking for high-quality activities involving nature and culture.

A new product to develop: garden tours.

Tour operators and travel agents (about 930) specializing in Canada, urban tourism and long haul travel.

Incentive tour market.

Convention organizers.

Theme

“Québec, North America with a certain je-ne-sais-quoi”

Marketing strategy

Advertising

- Consumer TV advertising campaign using printed advertising organized in cooperation with the CTC, Ontario, Air Canada, the Atlantic provinces and wholesalers.
- Consumer advertising campaign using various national print media.
- Advertising campaign targeting industry professionals through specialized media such as: TTG, Selling Long Haul, Travel Weekly, Globespan and specialized magazines aimed at the incentive travel segment.
- Production and distribution of the “Essentially Québec” brochure for 1999-2000.
- Joint promotions with wholesalers.

Press relations

- Press tours featuring maritime Québec, parks and gardens, Montreal's festivals, fine cuisine.
- The Organizer Joint Tour with the CTC and Alberta.
- Individual tours focusing mainly on winter and incentive travel.
- Training program dedicated to Québec for travel agents.

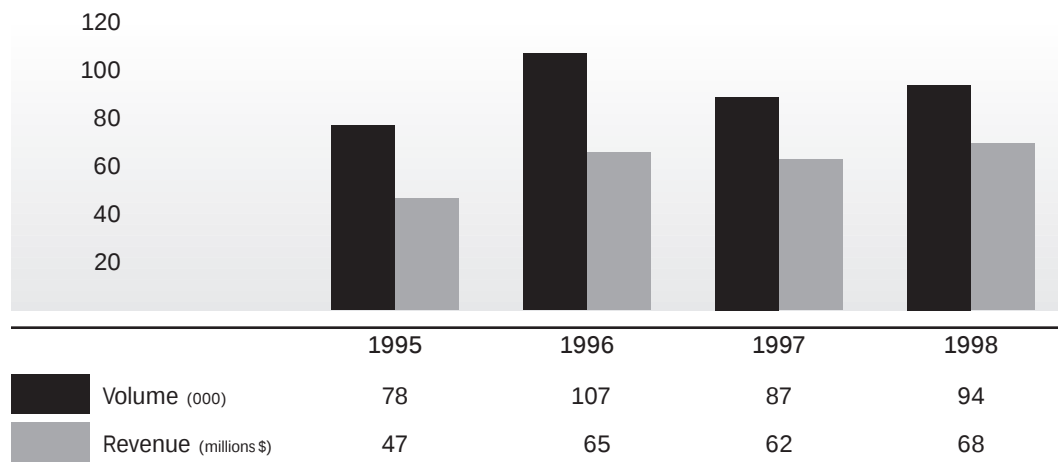
Canvassing

- Increase the distribution networks knowledge of the destination, in partnership with CTC and Ontario.
- Promotions presently being developed: Harrod's and Canadian Affairs.

3.3.3 Germany

■ Impressive growth

Market evolution



- The German market has shown a growth tendency since 1994 with a 60% increase in tourists in four years.
- In 1998 the number of German tourists visiting Québec increased by 8% while the Canada-wide figure decreased by 5%.
- With less than 10 % of German tourist spending in Canada, Québec has by no means exhausted this market potential.
- For 1999 the CTRI is predicting a slight growth in this market: 1% for both volume and spending.

Strengths and opportunities

- The recent advertising campaign targeting consumers (in cooperation with Air Canada, the OCTGM and ADM), the television campaign with the CTC, Air Canada, Ontario and the Atlantic provinces, as well as promotional activities in recent years, helping to raise Québec's profile.
- The aggressive marketing of a tourism salesman in Vlotho, resulting in direct representation for Québec in Germany. Nova Scotia is the only other province represented. This reinforces Québec's credibility as a tourist destination.
- The resumption in May 1998 of direct flights between Montreal and Frankfurt, increasing air capacity. This is an attractive opportunity for Québec's tourism industry, notably because of the investment in promotion by Air Canada. Royal Airlines will enter the field from June to September with a Frankfurt-Montreal run. Also, there is a new, regular Vienna-Montreal service offered by Austrian Airlines.
- The supply of packages to Québec by tour operators on the rise as a result of sustained efforts in recent years in terms of canvassing and public relations.
- Québec's opportunity to gain from a degree of saturation of Western Canada during the summer (50% of German tourists in Canada visit Alberta and British Columbia). Tour operators are showing a growing interest in Eastern Canada.
- Québec's representation by one of the best German press relations agencies. The agency has won the award for best press relations agency in the tourism field six times. The publicity value of articles on Québec in the German travel press amounted to \$18 million in 1998.

Challenges

- The presence of Québec's tourism industry in this market leaves something to be desired.
- Canada and Québec are frequently perceived as cold, uninteresting destinations. We lack tourist attractions with an established reputation.
- Germans fear they will not be understood if they speak English in Québec. They perceive Québec as similar to France.
- Competition is very tough because the Germans, with an increasingly difficult economic situation, are more price-conscious than ever. Shorter, less expensive trips are in demand. The value of the Canadian dollar against the German mark rose a great deal in 1998. This should favour tour packages sold by tour operators at the expense of individual travel, because Canada and Québec offer few packages for individual travelers.

■ Strategies and priorities for action

Objective

Consolidate Québec's brand image and increase the number of tourist packages offered for this destination.

Positioning

Positioning is based on the following themes: adventure, nature and outdoor activities; urban tourism in an inviting and exciting milieu.

Target clientele

Consumers with high disposable income

Incentive travel market

Tour operators and travel agents

Theme

"Mon nouvel amour est le Québec, une partie unique du Canada". (My new love is Québec, a unique part of Canada)

Marketing strategy

Advertising

- A campaign targeting consumers, in cooperation with Air Canada, Tourisme Montréal and the ADM (Montreal airports), promoting Québec summers in national publications and in weekly and monthly magazines. This will inform consumers about Québec as a summer destination and about the various package tours offered by tour operators. A publicity campaign targeting the industry will be developed simultaneously.
- Televised infomercial campaign with the CTC, Ontario, the Atlantic provinces and Air Canada.

Press relations

- Together with Air Canada and CP Hotels organize a press tour covering the opening of the Manoir Richelieu.
- Organize two filming sessions for German television, in particular the national ARD network.
- Organize press tours with Austrian Airlines and the ADM to promote the new Vienna-Montreal service.

Canvassing

- Continue efforts with tour operators to benefit from the new direct flight between Frankfurt and Montreal.
- Educate travel agents regarding the destination.
- More active canvassing of the incentive travel market.
- Sales mission to Frankfurt and Hamburg in September of 1999.
- On-site sales program in partnership with tour operators.
- Support for tour operators who invest in promoting new Québec programs.

3.3.4 Italy

A stable market

- The number of Italian tourists entering Canada via Québec remained stable in 1998.

Strengths and opportunities

- Italians' excellent knowledge of Canadian destinations, particularly Montreal, Toronto and Vancouver (large Italian community in Québec).
- Growing interest for the winter product and incentive travel.
- The number of seats reserved by Canadian and Québec motor coach operators for Italian groups, slated to double in 1999.

Challenges

- Italians' extensive travel within their own country.
- Unsatisfactory air service between Italy and Montreal. In 1999 a new Milan-Toronto run will be offered, which should increase the number of visitors to Québec.

■ Strategies and priorities for action

Objective

Increase our market share by benefiting from the new Italy-Canada flights.

Positioning

Summer and winter are promoted with particular emphasis on tours. Large increase in incentive travel.

Target markets

Central and Northern Italy.

Target client groups

High income consumers

Tour operators and travel agents

Incentive travel organizers

Theme

To be determined

Marketing strategy

Advertising

Tourisme Québec will join the advertising campaigns of the Canadian Tourism Commission and the airlines. We will stress cooperation with wholesalers.

Press relations

- Organize, with the CTC, individual and group press tours.
- Organize and coordinate the filming of a TV show for RAI TV (Italian State Television).

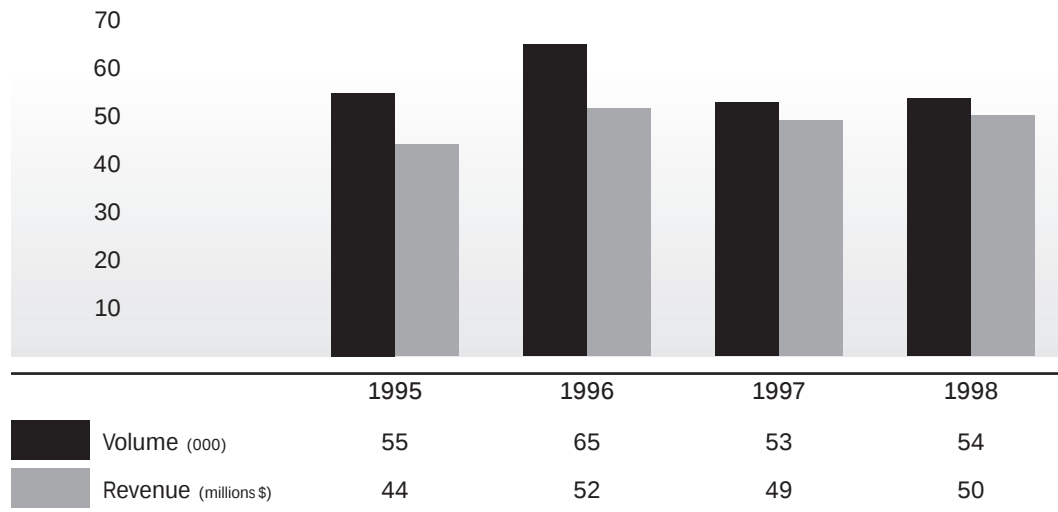
Distribution

- Invite wholesalers to include Québec in their marketing plans.
- Get more involved with travel agents.
- Be present at winter sports shows.

3.3.5 Japan

■ A lucrative market

Market evolution



- The number of provincial visits by Japanese tourists over the last ten years suggests great variations resulting from problems in methodology relating to the size of the samples. For this reason, the statistics produced by the Survey on International Travel (Statistics Canada) should be interpreted rather loosely and used only unofficially, as a guide.
- Over the last ten years Japan has been a rapidly growing tourist market: between 1987 and 1997 the number of overseas trips made by Japanese tourists more than doubled from 6,800,000 to 16,800,000.
- With overseas tourist spending in the order of US \$30.7 billion, Japan rates third after the U.S. (\$43 billion) and Germany (\$41.7 billion) among countries whose citizens spend the most in foreign countries.
- Sojourns in Canada are relatively short (5.9 overnight stays, compared to 11.3 for Europe), but the Japanese spend twice as much as the Europeans on accommodation.
- Québec's market share in Canada is only 7%, compared to 24% for Ontario.

- Japanese tourism in Québec remained stable in 1998. It should be noted that the number of Japanese tourists visiting Canada dropped by 16% in 1998 owing to the Asian crisis.
- For 1999 the CRTI is predicting strong growth in the Japanese market: 8% in volume, 12% in tourist spending.

Strengths and opportunities

- Québec has had a canvasser on the Japanese market since 1982.
- The degree of saturation of Japanese tourism in Western Canada.
- Québec's distinct character, together with the French fact and the historical charm of its capital. In addition, the Japanese place great importance on security issues and Québec enjoys a good reputation on that score.
- The Japanese's increasing desire to learn about, and get in touch with, other cultures to broaden their horizons. This need is very strong; in spite of the difficult economic situation, the number of overseas trips should continue to rise.
- Competing destinations beginning to scale back their promotional investments on the Japanese market. By maintaining the same level of investment, Québec increases its visibility and, accordingly, its profile as a destination.
- The changing market: the "young women" segment is declining, while that of seniors and older couples is growing. The latter group is less sensitive to price and more isolated from economic conditions. Air Canada's unique route from Osaka to some local cities should facilitate the promotion of Québec.
- The maturing of the Japanese market. In the future, more and more tourists will be traveling overseas for at least the second time. Longer stays in one place and off-season trips will become more popular.
- Airline deregulation in the United States and Japan, leading to new routes from gateways in the United States. Major airlines, such as Northwest Airlines, are showing greater interest in Canadian destinations with attractive fares. Minneapolis is Northwest's North American hub, which helps promote Québec.
- High-speed trains in many regions of Japan, improving access to major airports and facilitating overseas travel for the residents of those regions. New geographic markets will emerge.
- The growth of the Kansai market (the region of Japan whose major cities are Osaka, Kobe and Kyoto), generating a positive impact on Québec, which now has a canvasser in the region. This situation is seen in a very positive light in the region.
- The falling value of the yen relative to the Canadian dollar, which should help obtain better value in terms of marketing investments.

Challenges

- The lack of a direct flight to Montreal hampers efforts to market Québec as a destination.
- Japanese tourists are very demanding regarding certain services (cleanliness of premises, menus in Japanese, specific requirements in rooms, etc.)
- Québec's tourism industry is not overly interested in developing this market.
- Consumers always demand quality products, but at lower prices.

■ Strategies and priorities for action

Objective

To generate interest among consumers in Québec as a destination.

Positioning

City tourism and nature are promoted, with fall colours as the showcase product.

Target markets

The Tokyo, Osaka, Nagoya, Fukuoka and Sapporo regions.

Target client groups

High income aged 54 +.

Theme

“The passion of discovery”

Marketing strategy

Advertising

- An advertising campaign with Québec and Canadian partners (Montreal and Québec City tourist bureaus, Via Rail, Air Canada) will be launched in movie theatres in Tokyo-Osaka-Nagoya, as well as in Kobe, Kyoto and Fukuoka in the Kansai region. There will be promotion geared to consumers, and support will be provided for films and television broadcasts.

Press relations

In view of the limited budget available for the Japanese market, the development of press relations activities provides the best return on investment.

- Continue publication of a newsletter for the industry, jointly with Ontario.
- Organize group and individual press tours with the CTC, Air Canada and Canadian Airlines.
- Use entertainment like the Cirque du Soleil, Céline Dion and the Montreal Symphony Orchestra to organize press conferences.

Distribution

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

3.4 EMERGING MARKETS

There is agreement among experts that growth in tourism in older industrialized countries will depend on their ability to capitalize on the expansion of these new markets. To secure the long-term growth of its tourism industry, Québec must not delay in beginning to position itself on these markets.

3.4.1 Latin America

Mexico and Brazil are the two Latin American countries targeted by Québec.

- **Mexico** produced a growing number of tourists to Canada in 1998, showing an increase of over 16%.
- **Brazil** is a tourist market that greatly expanded from 1994 to 1996. The number of Brazilian visitors to Canada increased as much in 1998 as it did in 1997, by 2.4%. Results from the first months of 1999, at least those following the devaluation of the real, suggest a decline in tourism for this market. However, concerted efforts by the government have brought some stability to the real, which should lead to increased tourist travel in the second half of the year. Moreover, Canada attracts the wealthier Brazilian tourists, so the financial situation should have little consequence on tourist travel.

Strengths and opportunities

- Canada, including Québec, is viewed as a safe exotic destination (winter) and enjoys a very positive image.
- Airfares to North America are reasonable and the number of routes is growing.
- These tourists visit the United States frequently: 70% of Brazilians who come to Canada enter via the United States. New York and Miami are the main points of entry.
- Québec and these countries have Latin roots in common.
- NAFTA has contributed to increased exchanges with Mexico.
- Contrary to the situation in the United States, Mexicans do not require a visa to enter Canada.
- These markets have very good potential in the medium term: economic growth is strong and travel abroad is growing. There is a large middle and upper class that is educated and economically secure.
- Consumers in these countries are looking for tourist experiences Québec can offer: cultural tourism, soft adventure, city tourism (casinos, shopping, cultural events), resorts, skiing.

Challenges

- The tourist reputation of Canada and Québec on these markets lacks focus. It is not associated with specific tourism experiences.
- Canada and Québec are viewed as distant and cold destinations.
- Few tour operators offer packages that include Canada and Québec.

■ Strategies and priorities for action

Objective

To raise Québec's profile

- To take part in marketplaces and fairs in these markets.
- To make the distribution networks aware of Québec tourist products with the potential of interesting customers in these markets.
- To encourage tour operators to include Québec in more of their programming, in particular by inviting them to participate in *Rendez-vous Canada* and the *Ontario-Québec Marketplace*.
- Intensify press relations activities.

3.4.2 Pacific Rim Countries

With the exclusion of Japan, the number of tourist from this region who visited Québec rose substantially from 1993 to 1996: 79% by volume and 80% by revenue. In 1996, there were 177,000 province-trips generating tourism revenue of \$103 million.

In 1998 the economic downturn that shook the world contributed to the decline in travel to Canada from most of the Asian-Pacific markets as compared to the previous year. The greatest declines were from South Korea (-56%), Japan (-14%) and Taiwan (-12%).

Taiwan: the best short-term growth potential

Travel abroad from Taiwan declined by 4%, while travel to Canada dropped by 12%. However, travel to Canada picked up in October of 1998. By December, there was an increase of 25% in the number of visitors.

Strengths and opportunities

- Taiwanese tour operators' showing increasing interest in Québec and its cultural difference. Recent familiarization tours with tour operators have resulted in new fall/winter packages for Ontario and Québec.
- Tourisme Québec now has a promotional document in Mandarin, produced jointly with the CTC, Ontario and Canadian Airlines International.
- The increasing saturation of Western Canada as a destination, prompting Canadian Airlines to seek points of entry to other destinations in Canada.
- The incentive travel segment's continuing demonstration of excellent potential.
- The 31% increase in Canadian International's flight service to Taiwan in 1998 resulting in a 47% increase in ticket sales in the first trimester of 1999.
- The dramatic change in the rules of the game this summer when China Airlines takes control of Mandarin Airlines' international flights, including the Taipei-Vancouver run. Moreover, Air Canada and EVA Airways have received approval to begin flights between Taiwan and Canada. In 1999 no less than four airlines will provide non-stop service between Taipei and Vancouver.
- Tourisme Québec's excellent relationship with Taiwan's tourist media.

Challenges

- Like the rest of Canada, Québec is perceived as a cold and expensive destination in winter.
- The cost of a visa for Canada is exorbitant.
- Flying time between Taiwan and Québec is 18 hours.
- Wholesalers find it difficult to sell individual packages. The percentage of individual trips to Canada from Taiwan increased from 30% to 40%, but not for Québec. The "French fact," an attraction for many, represents a challenge for others. The Taiwanese tourists fear that French is the only language spoken.
- Québec's tourism industry remains unfamiliar with Taiwanese culture and the requirements of Taiwanese tourists.

South Korea: high potential despite the more difficult context

The economic conditions in Korea show signs of improvement: the government expects a 3.4% increase in the GDP for 1999. With economic recovery and renewed consumer confidence, travel agents see their business gradually returning to normal. Foreign travel has greatly increased since December of 1998, showing a 39.6% gain. Travel agents who specialize in foreign travel think that this increase in global markets will have a positive effect on Canadian tourism. The number of Koreans travelling to Canada increased by 5.5% in December of 1998 after months of decline.

Strengths and opportunities

- The Koreans' attraction to Québec's cultural difference.
- Koreans' love of winter sports and adventure packages.
- Québec's proximity to Ontario.
- Wholesalers' interest in promoting Canada and its tourist destinations.

Challenges

- The continuing fragility of the economic situation.
- The distance between Québec and Korea (flying time).
- Consumers' lack of understanding of Québec tourism products.
- Québec, like the rest of Canada, is considered to be an expensive tourist destination.
- The tourist industry in Québec doesn't seem too interested in developing the market.

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Hong Kong: Gateway to China

Hong Kong is the only Asian market that showed an increase in visitors to Canada over the last six months of 1998. For travelers from Hong Kong, Canada is traditionally a destination for visits with family and friends.

Strengths and opportunities

- A population well-off economically and sophisticated, traveling abroad extensively and increasingly appreciative of Canada.
- Increasing interest on the part of wholesalers for Québec products.
- Excellent air services.
- Proximity to Ontario.
- Since it was returned to China on July 1, 1997, Hong Kong has become the gateway to the market with the highest potential growth in the world. Immigration figures for Chinese people entering Canada are on the rise. This should bring about a corresponding increase in the number of Chinese tourists visiting Canada. Some regions of China like Shanghai, Guangdong, Beijing, Shandong and Dalian are becoming more and more prosperous and are demonstrating a strong demand for foreign travel. The stability of the state-controlled Chinese currency in terms of the US dollar means that the cost of tourism has not gone up for Chinese travelers.

Challenges

- The distribution network offers few packages in Québec: the West and Ontario are more visible.
- Political integration with China makes this market uncertain for the next few years.

Australia and New Zealand: new frontiers

Strengths and opportunities

- Capitalize on the positive perception of Canada as a tourist destination.

Challenges

- Mitigate the impact of distance.
- Encourage major tour operators to program Québec.

■ Strategies and priorities for action

Objective

To raise Québec's profile

- Emphasize Taiwan.
- Acquaint the distribution network with Québec through press relations activities, information seminars and familiarization tours.
- Encourage tour operators to program new packages for Québec.
- Participate in marketplaces and fairs and the various promotional activities organized in cooperation with the CTC and the airlines (International Travel Fair in Taipei in November 1999).
- Carry out joint activities with Tourisme Ontario.
- Continue to develop business relations with the Asian tour operators established in Toronto and Vancouver.
- Continue contributing to the *Canadian Travel Newsletter* in Mandarin.
- Bi-annual mailing of Québec Trip Talk, destined for network distribution.
- Update the database on Asian markets for the Québec tourism industry.

3.5 MULTI-MARKET PROMOTIONAL ACTIVITIES

3.5.1 Promotional Tools and Publications

In order to position Québec as a destination, Tourisme Québec produces tourist brochures, support material for promotional activities and promotional tools for distribution networks. The publishing program for 1999-2000 may be found in Appendix 2.

The year's action priorities:

- *Defining a standard image of the destination.* This reflection will be carried with a view to framing a visual standard of the Québec tourist destination in order to give coherence and unity to promotional documents and to offer consumers a recognizable image of Québec as a tourist destination.
- *A new collection of theme pamphlets.* The first in a brand new series of theme pamphlets will appear in 1999. This pamphlet, generously illustrated, will showcase some 20 Québec gardens. It will be designed mainly to interest American amateur gardeners and horticulturists. The second pamphlet, to appear sometime during the year, will feature religious tourism.
- *Enriching the photo library.* The collection will be expanded, and some of the photo database will be converted for electronic transmission in order to satisfy the increasing demand for this service.
- *Publication of a new introductory leaflet*
- *Reissuing the brochure called Meeting in Québec,* promoting business tourism in Québec.
- *Developing new marketable promotional tools.* Also, the partnership will be solidified with the Direction de l'accueil et des renseignements touristiques relative to the sale of promotional articles in tourist information centres.

3.5.2 Tourist Information

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 seven Infotouriste centres.

For 1999-2000 the priorities for action are:

- To continue developing a destination management system (information, reservations), in cooperation with Bell Canada and the industry;
- To maintain the excellent quality of service.

STRATEGIES

AND PRIORITIES FOR ACTION BY PRODUCT

In order to answer the needs of partners interested in the commercialization of specific products, this chapter presents the main strategies to be applied to each.

■ Tour – City tourism

- Distribute and promote (in print and on the Internet) nine gateway tours around Montreal and Québec City, and a promotional document on two alternate routes between Montreal and Québec: the *Route du Sud* (Montérégie, Cantons-de-l'Est, Chaudière-Appalaches) and the *Route du Nord* (Laurentides, Lanaudière, Mauricie - Bois-Francs).
- Produce and distribute an initial series of leaflets highlighting themes or attractions such as: parks and gardens, religious, farm and cycling tourism.
- Manage the tourist events program.
- Incorporate new products into Tourisme Québec's advertising campaigns.
- Renew the direct marketing campaign with CAA-Québec and Kilomètre Voyages: mailing a vacation package guide to one million consumers in Québec.
- Support the development and promotion of interregional tours with regional tourism associations, including *Québec maritime* and the *Route du Sud*.
- Continue to support the ACTA Vacances Québec project: production of two sales manuals, training and upgrading sessions, familiarization tours.
- Maintain financial support for those that are receptive to familiarization tours.
- Increase the promotion of international cruises on the St. Lawrence.
- Maintain cooperation with the Association des propriétaires d'autobus du Québec (APAQ).
- Coordinate activities for the creation of the Grand Nord RTA and ensure that the action plans developed meet the objectives of Tourisme Québec. Encourage the three sub-regional RTAs to publish a regional tourism guide.
- Setting up a sectorial round table discussion on cyclotourism (cycle touring) with a view to developing a marketing plan to position Québec as a choice cyclotourism destination.

■ Conventions, business meetings and incentive travel

- Develop a new standard concept to highlight Montreal and Québec as destinations while maintaining general positioning for Québec.
- Once databases have been developed, intensify telemarketing and canvassing among corporations and incentive travel companies.
- Intensify efforts in Europe for the incentive travel segment.

■ Skiing

- Review the advertising approach used on the American ski club market.
- Intensify promotion of the winter experience among a more diversified clientele.
- Intensify the partnership with the distribution network.
- Strengthen promotion of skiing on secondary markets in the United States and overseas.
- Participate in cross-country ski product club activities.

■ Resort tourism

- Continue financial support for Hôtellerie Champêtre, the Association des relais de santé and Relais et Châteaux, and ensure that they are included in Tourisme Québec advertising campaigns.
- Develop a golf marketing plan jointly with the CTC.

■ Snowmobiling

- Continue the Québec-Ontario-CTC campaign and improve promotion of this product in Tourisme Québec campaigns.
- Support the Fédération des clubs de motoneigistes du Québec in organizing and promoting the first "world snowmobiling summit" in September 1999.
- Increase and improve the participation of vendors in snowmobile trade shows.
- Evaluate the pertinence of participation in some snowmobile shows in the northeastern U.S.
- Promote snowmobiling as a tourist product at the Salon mondial du deux roues in France.

■ Adventure

- Improve the marketing approach for this product by integrating it more effectively with Tourisme Québec advertising campaigns and steering press relations increasingly to this product.
- Participate in the activities of Aboriginal Tourism Team Canada to promote the positioning and marketing of aboriginal tourism in Québec.
- Support the new aboriginal tourism association in Québec.
- Prepare a brochure on aboriginal tourism for the European market.
- Continue financial support for the Association des producteurs de tourisme d'aventure du Québec by encouraging marketing activities for their products.
- Participate and encourage the participation of Québec partners in consumer shows on adventure products in the United States and Europe.

- Support adventure and aboriginal clubs.
- Promote mountain biking, off-road cycling, Quad and motorcycling at the Salon mondial du deux roues in France.

■ Hunting and fishing

- Produce a new package guide for Canada and the United States.
- Raise the number of shows in the United States in which Tourisme Québec participates.
- Increase cooperative advertising with outfitters.
- Increase sponsorship in American hunting and fishing TV broadcasts.
- Introduce a leisure fishing product to the European market as a part of current package tours from tour companies to ensure greater visibility, promotion and distribution of the product.

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OPPORTUNITIES

FOR THE INDUSTRY

Tourisme Québec offers the tourism industry opportunities for advertising and marketing its products.

5.1 SHOWS, MARKETPLACES AND FAIRS

Tourisme Québec offers Québec tourist companies the opportunity to participate in trade missions on the tourist markets targeted by Québec. These missions take place in specialized marketplaces, trade fairs and shows, where Québec firms meet distributors. Marketplaces and fairs planned for 1999-2000 are listed below.

Germany

- International Travel Bourse (ITB), March 2000 (11 to 15)
- Trade mission to Germany, September 1999 (13 to 17), Hamburg (14) and Frankfurt (16)

Argentina

- Feria Internacional de Turismo (FIT), October 1999 (16 to 19)

Australia

- Corroboree and Spirit of Canada, January 2000 (end of January/beginning of February)

Belgium

- Vacation show, Brussels, March 2000 (18 to 26)

Brazil

- ABAV - (Brazilian fair for travel agents), October 1999 (5 to 7)
- Workshops (to be determined, one month before Braztoa)
- Brazil Tour Operator Association (BRAZTOA), April 2000 (to be confirmed)

Canada

- Rendez-vous Canada, Calgary, May 2000 (to be confirmed)
- Toronto ski show, October 1999 (15 to 17)
- Supertrax Snowmobile Show, Toronto, October 1999 (22 to 24)
- Travel and Leisure Show '99, April 2000 (to be confirmed)

Spain

- Feria Internacional de Turismo (FITUR), January 2000 (26 to 30)
- An evening in Barcelona prior to, or following, the FITUR

United States

- Boston Snowsports Expo '99, November 1999 (18 to 21)
- Chicago Ski Show '99, November 1999 (4 to 7)
- Cleveland Ski Fair '99, October 1999
- International Adventure, Travel and Outdoor Show, February 2000 (to be confirmed)
- Trade mission to the United States, October 1999 (18 to 22) (to be confirmed): San Francisco/San Jose/Santa Monica /Newport Beach, CA
- Trade mission to the United States, September 1999: Raleigh, NC/New Orleans, LA/Birmingham, AL and Atlanta, GA
- Trade mission to the United States, March 2000: San Francisco/Oakland/Los Angeles/San Diego, CA
- Trade mission to the United States, March 2000: Dallas, TX/Atlanta, GA/Jacksonville, FL
- National Ski Expo, Detroit, October 1999 (22 to 24)
- Nonprofit In Travel, Washington, DC, end of February/beginning of March 2000
- New York (L.I.) Ski Expo '99, November 1999 (12 to 14)
- Philadelphia Ski Expo '99, October 1999 (15 to 17)
- RSA, New York, beginning of February 2000
- USTOA, Las Vegas, NV, December 1999 (10 to 13)
- Washington Ski Expo '99, November 1999 (5 to 7)

France

- Caen Fair, October 1999 (21 to 23)
- Journées méditerranéennes (Mediterranean days), May 1999 (22 to 24)
- Mahana, March 2000 (10 to 12)
- Mondial du 2 roues, Paris, October 1999 (21 to 23)
- Partir en hiver (winter vacations), November 1999 (6 to 8)
- Randoexpo, April 2000 (9 to 11)
- Nantes tourism show, February 2000 (11 to 13)
- Rennes tourism show, January 2000 (to be confirmed)
- Salon mondial du tourisme (world tourism show), March 2000 (16 to 19)
- SITV Colmar, November 1999 (11 to 13)

Italy

- Borsa Internazionale del Turismo (BIT), February 2000 (23 to 27)

Japan

- Kanata, October 1999 (18 to 22)
- Trade mission to Japan, February 2000 (beginning of February; to be confirmed).

Mexico

- Conozca, April 2000 (26 to 29)
- Invierno, September 1999 (to be confirmed)

New Zealand

- Canada Calls, January 2000 (to be confirmed)

United Kingdom

- London Ski Show, October 1999 (October 29 to November 7)
- Spotlight Canada, March 2000 (6 to 8)
- World Travel Market (WTM), November 1999 (15 to 18)

Taiwan, Hong Kong, Singapore and South Korea

- Trade mission to Asia, October 1999 (to be confirmed)

5.2 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.

For further information on this program, contact *Suzanne Watson* of the Direction du développement des marchés at (514) 864-2542.

5.3 FINANCIAL SUPPORT FOR REGIONAL TOURIST ASSOCIATIONS

Tourisme Québec provides financial assistance to regional tourist associations to enable them to fulfill their mission, which is primarily to promote their regional tourist products. An agreement was entered into for 1999-2002 with the regional tourist associations. As in 1998, special financial assistance will be granted to the three subregions in the Grand Nord RTA.

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

5.4 CANVASSING

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

Cities	Markets covered
New York	Atlantic Centre and the portion of Atlantic South north of North Carolina
Chicago	Centre Northeast and Centre Northwest
Dallas	Centre Southwest, Centre Southeast and the portion of Atlantic South south of Virginia
Los Angeles	Pacific and Mountain
Paris	France Belgium
London	United Kingdom Netherlands
Vlotho	Germany Austria Switzerland
Tokyo	Japan
Toronto	Canada Korea Taiwan Hong Kong
Montreal	Canada (Maritimes) United States (New England) Italy Spain Mexico and Brazil Australia and New Zealand

Contact information for the canvassers is given in Appendix 3.

For more information on this subject, please contact:

For the North American market, *Jean Bouffard*, of the Direction du développement des marchés at (514) 864-2873;

For overseas markets, *Réjean Lafleur*, of the Direction du développement des marchés at (514) 864-2758.

5.5 TECHNICAL SUPPORT AND ADVICE

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

- Marketing tourist products

For more information on this subject, please contact those in charge of products with the Direction du développement des marchés

Suzanne Watson (514-864-2542) *Sophie Marcoux* (514-864-2625): city tourism, tours, tourism events, cruises, bicycle touring, regional cuisine;

Hélène Fortier (514-864-2712) : alpine skiing, resort vacations, health tourism, cross-country skiing, golf;

Louis B. Parent (514-864-2737): snowmobiling, adventure, aboriginal tourism, outdoors;

Raynald Paquet (514-864-2734): conventions, business meetings, incentive travel;

Michel Leblanc (514-864-2698): hunting and fishing.

- Awareness of products and markets

For more information on this subject, contact *Jean-François Demers* of the Direction de la recherche et du développement at (418) 643-3061.

5.6 JOINT PROMOTIONAL CAMPAIGNS

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

- The Agrément campaign on the Québec market

Partners can participate in the television campaign (shows and advertising).

For more information on this subject, contact *Gilles Parent* of the Direction de la promotion at (514) 864-1733.

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

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

Partners may participate in:

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

For more information on this subject, contact *Jacques Moisan* of the Direction de la promotion at (514) 864-1833.

5.7 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).

For more information on this subject, contact *Roselyne Hébert* of the Direction de la promotion, at (514) 864-1864

5.8 TOURIST INFORMATION

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

- By placing folders in display stands;

For more information on this subject, contact your *regional tourism association* or *Jacinthe Dumoulin* of the Direction de l'accueil et des renseignements touristiques at (514) 864-1331.

- Presentation of short activities;
- Rental of display cases (limited space);
- Wall space for posters (Infotouriste centres of Montreal and Québec).

For more information on this subject, contact, for Montreal, *Ion Valcéanu* of the Direction de l'accueil et des renseignements touristiques at (514-864-1042) and, for Québec, *Lucie Loignon* of the Direction de l'accueil et des renseignements touristiques at (418-643-2280).

Moreover, companies wishing to promote their products to the Québec tourist clientele in contact with our call center may participate in a direct mail advertising plan (one in winter, another in summer).

For additional information on this subject, contact *Pierre Boucher* of the Direction de la promotion (514) 864-1788.

5.9 VIDEO LIBRARY

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

For rental, companies are asked to contact *Ramon Iturbe*, of Océan Production at (514) 284-2954. For additional information please contact *Pierre Boucher* of the Direction de la promotion (514) 864-1788.

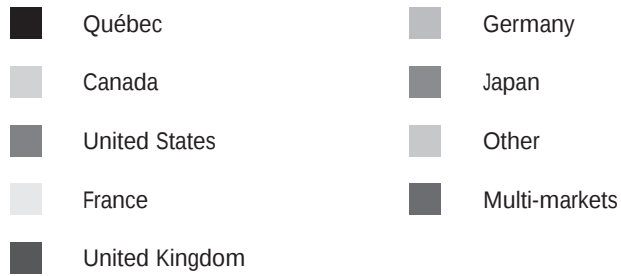
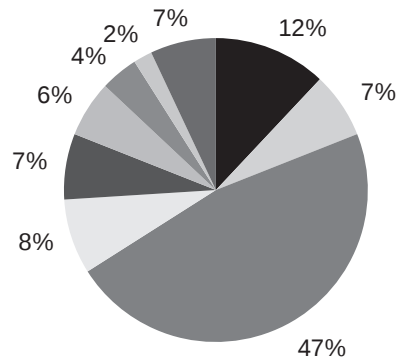
BUDGET

BY MARKET

(\$000, figures rounded off)

PRODUCTS AND SERVICES	Québec	Canada	United States	Europe				Pacific Rim			Latin America	Multi Markets	TOTAL
				France	United Kingdom	Germany	Other markets	Japan	Australia New Zealand	Other markets			
Positioning and marketing of Québec													
Advertising	2 025	1 020	6 700	415	470	430	100	144	8	7	21	1 000	11 340
Publishing	234	133	559	149	75	75		75					1 300
Press relations	70	50	260	140	110	220	55	95	8	20	10	50	1 088
Canvassing		128	804	590	456	331		278				144	2 731
Marketplaces		15	321	50	43	69	13	75	1	10	18	17	632
Consumer promotions	10		116	5				10				220	361
Receptions		32	165	15	31	15	11	19		10	5	33	336
Consumer shows		26	83	96	38	29	18	10			1		301
Seminars		5	133	12	178	35		8	4	5			380
Familiarization tours		10	71	28	27	14	5	12	5	5	15	57	249
Other			200									965	1 165
Sub-total	2 339	1 419	9 412	1 500	1 428	1 218	202	726	26	57	70	1 486	19 883
Financial support for the tourism industry													
RTA												7 500	7 500
Grand Nord RTA												600	600
Regional tourism (Accommodation tax)												7 400	7 400
Tourism events- (PPC)												325	325
Partners in Québec (PPC)	95		10									343	448
Partners elsewhere (PPC)			100	88	50	56	60	30	10	115	40		549
Sub-total	95	0	110	88	50	56	60	30	10	115	40	16 168	16 822
TOTAL	2 434	1 419	9 522	1 588	1 478	1 274	262	756	36	172	110	17 654	36 705

*Distribution by country of Québec's positioning
and market development market*



OPERATING PLAN

1999-2000

MONTREAL					
CATEGORY	ACTIVITY	CITY	PRODUCT	DATE	BUDGET (000 \$ CAN)
ACTIVITIES					
Marketplaces					
	Headliners	Québec	M & IT	99-07-21	4.1
	Rendez-vous Canada	Halifax	All	99-05-10	13.0
<i>Total</i>	<i>Marketplaces</i>				<i>17.1</i>
Estimated revenue – Activities					
	Revenue from activities		All	00-03-31	365.0
<i>Total</i>	<i>estimated revenue – Activities</i>				<i>365.0</i>
Advertising directed at consumers					
	Adventure (APTAQ)	Territory	Adventure	00-03-01	45.0
	Map of museums and art galleries	Territory	Tours	00-03-01	10.0
	Thematic tours	Territory	Tours	00-03-01	100.0
	Health product clubs	Territory	Tours	00-03-01	5.0
	Cross-country ski clubs	Territory	Skiing	00-03-01	5.0
	Aboriginal tourism product clubs	Territory	Adventure	00-03-01	10.0
	Cruises committee	Territory	Tours	00-03-01	25.0
	Aboriginal tourism	Territory	Tours	00-03-01	20.0
<i>Total</i>	<i>Consumer advertising</i>				<i>220.0</i>
Receptions					
	Various receptions	Territory	All	00-03-01	5.0
	Headliners	Québec	M & IT	99-07-21	12.7
	Rendez-vous Canada	Halifax	M & IT	99-05-10	15.0
<i>Total</i>	<i>Receptions</i>				<i>32.7</i>

MONTREAL (cont'd)

CATEGORY	ACTIVITY	CITY	PRODUCT	DATE	BUDGET (000 \$ CAN)
Familiarization tours					
	Bienvenue Québec	Montreal	Tours	99-11-01	12.0
	Hunting and fishing		Hunting and	00-03-01	25.0
	Rendez-vous ski Québec		Skiing	99-11-01	20.0
<i>Total</i>	<i>Familiarization tours</i>				<i>57.0</i>
Travel expenses – Activities					
	Travel expenses – Activities		All	00-03-31	200.0
<i>Total</i>	<i>Travel expenses – Activities</i>				<i>200.0</i>
Total	Activities				891.8
TRAVEL EXPENSES – QUÉBEC					
Travel expenses – Québec					
	Travel expenses – Québec		All	00-03-31	50.0
<i>Total</i>	<i>Travel expenses – Québec</i>				<i>50.0</i>
Total	Travel expenses – Québec				50.0
INTERNATIONAL REPRESENTATION					
	Canvassing		All	00-03-31	2,649.7
<i>Total</i>	<i>International representation</i>				<i>2,649.7</i>
OTHERS					
	Thematic tours	Montréal	All	00-03-31	48.0
	Administrative manual	Montréal	All	00-03-31	3.8
	Emerging markets (marketplaces and trade shows)	Montréal	All	00-03-31	30.0
<i>Total</i>	<i>Others</i>				<i>81.8</i>
Total	International representation				2,731.5
TRANSFER					
PPC – Partners outside Québec					
	Miscellaneous		All	00-03-31	343.0
<i>Total</i>	<i>PPC – Partners outside Québec</i>				<i>343.0</i>
PPC – TOURIST EVENTS					
	Miscellaneous		All	00-03-31	325.0
<i>Total</i>	<i>PPC – Tourist events</i>				<i>325.0</i>
Total	Transfer				668.0

MONTREAL (cont'd)					
CATEGORY	ACTIVITY	CITY	PRODUCT	DATE	BUDGET (000 \$ CAN)
SUPPORT FOR RTAS					
RTA Nord du Québec					
	Baie-James		All	00-03-31	200.0
	Grand Nord		All	00-03-31	200.0
	Nunavik		All	00-03-31	200.0
<i>Total</i>	<i>RTA Nord du Québec</i>				<i>600.0</i>
SUPPORT FOR RTAS					
	RTA – Abitibi-Témiscamingue		All	00-03-31	352.5
	RTA – Bas-Saint-Laurent		All	00-03-31	360.0
	RTA – Cantons-de-l'Est		All	00-03-31	455.0
	RTA – Charlevoix		All	00-03-31	352.5
	RTA – Chaudière-Appalaches		All	00-03-31	352.5
	RTA – Duplessis		All	00-03-31	305.0
	RTA – Gaspésie		All	00-03-31	365.0
	RTA – Îles-de-la-Madeleine		All	00-03-31	285.0
	RTA – Lanaudière		All	00-03-31	352.5
	RTA – Laurentides		All	00-03-31	480.0
	RTA – Laval		All	00-03-31	305.0
	RTA – Manicouagan		All	00-03-31	315.0
	RTA – Mauricie–Bois-Francs		All	00-03-31	430.0
	RTA – Montérégie		All	00-03-31	360.0
	RTA – Montréal (OCTGM)		All	00-03-31	1 020.0
	RTA – Outaouais		All	00-03-31	390.0
	RTA – Québec (OTCCUQ)		All	00-03-31	650.0
	RTA – Saguenay–Lac-Saint-Jean		All	00-03-31	370.0
<i>Total</i>	<i>Support to RTAs</i>				<i>7 500.0</i>
Total	Support for RTAs				8 100.0
SUPPORT FOR REGIONAL TOURISM					
Support for regional tourism (tax)					
	OCTGM	Montréal	All	00-03-31	7 000.0
	Office in Laval	Laval	All	00-03-31	400.0
<i>Total</i>	<i>Support for regional tourism (tax)</i>				<i>7 400.0</i>
Total	Support for regional tourism				7 400.0
Total	Montréal				20 191.1

QUÉBEC

CATEGORY	ACTIVITY	CITY	PRODUCT	DATE	BUDGET (000 \$ CAN)
PROMOTION					
Advertising					
	Summer campaign	Territory	All	00-03-31	1 500.0
	Winter campaign	Territory	All	00-03-31	500.0
	Travel and leisure show	Territory	All	00-03-31	25.0
<i>Total</i>	<i>Advertising</i>				<i>2 025.0</i>
Publishing					
	Publications and promotional material	Territory	All	00-03-31	234.0
<i>Total</i>	<i>Publishing</i>				<i>234.0</i>
Press relations					
	Press tours	Territory	All	00-03-31	70.0
<i>Total</i>	<i>Press relations</i>				<i>70.0</i>
Total	Promotion				2 329.0
ACTIVITIES					
Advertising directed at consumers					
	Via Adventure	Adventure		00-03-01	10.0
<i>Total</i>	<i>Advertising directed at consumers</i>				<i>10.0</i>
Total	Activities				10.0
TRANSFER PROGRAM					
PPC – Partners outside Québec					
	CAA/KM		All	00-03-31	95.0
<i>Total</i>	<i>PPC – Partners outside Québec</i>				<i>95.0</i>
Total	Transfer program				95.0
Total	Québec				2 434.0

MARITIMES					
CATEGORY	ACTIVITY	CITY	PRODUCT	DATE	BUDGET (000 \$ CAN)
ACTIVITIES					
Consumer shows					
	ACTA Atlantic	Halifax, NS	Skiing	99-11-13	0.2
	Blanche Neige	Bathurst, NB	Tours	99-10-01	1.0
	Flavour	Halifax, NS	Tours	99-04-30	1.6
	Shediac Ski Club	Shediac, NB	Skiing	99-10-01	1.0
<i>Total</i>	<i>Consumer shows</i>				<i>3.8</i>
Total	Activities				3.8
Total	Maritimes				3.8

TORONTO

CATEGORY	ACTIVITY	CITY	PRODUCT	DATE	BUDGET (000 \$ CAN)
PROMOTION					
Advertising					
	Advertising – AD HOC		All	00-03-01	20.0
	Advertising – summer		All	00-03-01	500.0
	Advertising – winter		All	00-03-01	500.0
<i>Total</i>	<i>Advertising</i>				<i>1 020.0</i>
Publishing					
	Publications and promotional material	Territory	All	00-03-31	132.6
<i>Total</i>	<i>Publishing</i>				<i>132.6</i>
Press relations					
	Press relations		All	00-03-01	50.0
<i>Total</i>	<i>Press relations</i>				<i>50.0</i>
<i>Total</i>	<i>Promotion</i>				<i>1 202.6</i>
ACTIVITIES					
Marketplaces					
	CSAE	Newfoundland	M & IT	99-07-17	1.5
	International Inbound	Vancouver, BC	All	99-12-01	0.7
	Meeting & Incentive	Toronto, ON	M & IT	99-08-17	2.0
	Canadian Trade Show				
	OMCA	Toronto, ON	Tours	99-11-01	1.5
	Pata (Pacific Asia Travel)	Toronto, ON	All	00-03-01	1.0
	Product Launches	Toronto, ON	All	00-03-01	4.0
	Quebec Day	Toronto, ON	M & IT	00-02-01	0.0
	Ski group	Toronto, ON	Skiing	99-05-01	0.8
	SYTA	Toronto, ON	All	99-10-01	0.8
	Visumart	Nevada	All	99-09-01	3.0
<i>Total</i>	<i>Marketplaces</i>				<i>15.3</i>
Seminars					
	MPI	Toronto, ON	M & IT	99-06-22	3.0
	MPI – WEC	Philadelphia, PA	M & IT	99-07-01	1.0
	MPI PEC	Nashville, TN	M & IT	00-01-01	1.0
<i>Total</i>	<i>Seminars</i>				<i>5.0</i>

TORONTO (cont'd)					
CATEGORY	ACTIVITY	CITY	PRODUCT	DATE	BUDGET (000 \$ CAN)
Consumer shows					
	Lifestyle Show 99	Ottawa, ON	All	99-10-06	1.6
	Hunting and Fishing Show	Toronto, ON	Hunting and fishing	99-11-01	2.0
	Snowmobiler Show	Montreal, QC	Snowmobiling	99-10-01	2.0
	The Great Canadian Maturity & Travel Show	Toronto, ON	All	99-10-21	2.0
	The Travel & Leisure Show	Toronto, ON	All	99-04-01	3.0
	The Travel & Vacation Show	Ottawa, ON	All	99-04-01	2.0
	Toronto Ski Show	Toronto, ON	Skiing	99-10-01	10.0
<i>Total</i>	<i>Consumer shows</i>				<i>22.6</i>
Receptions					
	Cirque du Soleil	Toronto, ON	Tours	99-08-01	10.0
	Cirque du Soleil	Toronto, ON	M & IT	99-08-01	5.0
	Monthly Luncheons PATA/ANTOR/SATW	Toronto, ON	All	00-03-01	1.2
	MPI Toronto	Toronto, ON	M & IT	99-06-22	4.5
	Québec ski night	Toronto, ON	Skiing	00-03-01	5.0
	SITE	Toronto, ON	All	99-08-01	1.0
	Société des casinos du Québec: Ontario Promotion	Toronto, ON	Tours	99-05-01	5.0
<i>Total</i>	<i>Receptions</i>				<i>31.7</i>
Familiarization tours					
	Various tours	Territory	All	00-03-15	10.0
<i>Total Activities</i>					<i>84.7</i>
Total	Toronto				1,347.3

UNITED-STATES

CATEGORY	ACTIVITY	CITY	PRODUCT	DATE	BUDGET (000 \$ CAN)
PROMOTION					
Advertising					
	Summer-fall campaign	Territory	All	00-03-31	3,000.0
	Winter campaign	Territory	All	00-03-31	3,700.0
<i>Total</i>	<i>Advertising</i>				<i>6,700.0</i>
Publishing					
	Publications and promotional material	Territory	All	00-03-31	559.6
<i>Total</i>	<i>Publishing</i>				<i>559.6</i>
Press relations					
	Press tours	Territory	hunting and fishing	00-03-31	70.0
	Press tours	Territory	All	00-03-31	110.0
<i>Total</i>	<i>Press relations</i>				<i>180.0</i>
Total	Promotion				7,439.6
ACTIVITIES					
Marketplaces					
	ABA	Birmingham, AL	Tours	99-12-01	5.0
	NTA	Nashville, TN	M & IT	99-11-01	5.0
	USTOA	Las Vegas, NV	All	99-12-01	0.9
<i>Total</i>	<i>Marketplaces</i>				<i>10.9</i>
Seminars					
	Canada Specialists Program		All	00-03-01	15.0
	Quebec Specialists Convention	Mont-Tremblant	All	99-05-20	30.0
	Quebec Specialists Program		All	00-03-01	46.2
<i>Total</i>	<i>Seminars</i>				<i>91.2</i>
Consumer shows					
	Hunting and fishing shows	15 cities	Hunting and fishing	00-01-01	30.0
<i>Total</i>	<i>Consumer shows</i>				<i>30.0</i>
Familiarization tours					
	Uniglobe – Reception / Fam.	Tremblant, QC	All	99-05-15	5.0
<i>Total</i>	<i>Familiarization tours</i>				<i>5.0</i>
Total	Activities				137.1

OPERATING PLAN

UNITED-STATES (cont'd)					
CATEGORY	ACTIVITY	CITY	PRODUCT	DATE	BUDGET (000 \$ CAN)
OPERATING ACTIVITIES					
Operating activities: other expenses					
	Telemarketing Bos		M & IT	00-03-01	200.0
<i>Total</i>	<i>Operating activities: other expenses</i>				<i>200.0</i>
Total	Operating activities				200.0
TRANSFER					
PPC – Partners outside Québec					
	Miscellaneous to be determined	Territory	All	00-03-15	100.0
<i>Total</i>	<i>PPC – Partners outside Québec</i>				<i>100.0</i>
Total	Transfer				100.0
Total	United States				7,876.8

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CHICAGO

CATEGORY	ACTIVITY	CITY	PRODUCT	DATE	BUDGET (000 \$ CAN)
ACTIVITIES					
Marketplaces					
	Chicago Tribune	Chicago, IL	Tours	00-03-01	1.2
	Cleveland Plain Dealer	Cleveland, OH	Tours	00-03-01	0.6
	CSAE – Golf tournament	Chicago, IL	M & IT	99-08-01	0.9
	CSAE/Holiday Showcase	Chicago, IL	M & IT	99-12-01	2.4
	Detroit News	Detroit, MI	Tours	00-03-01	1.2
	IGLTA Convention	Minnesota, MN	Tours	99-05-13	1.5
	IT & ME	Chicago, IL	M & IT	99-07-01	15.0
	Milwaukee Sentinel	Milwaukee, WI	Tours	00-03-01	0.5
	Minneapolis Star Tribune	Minneapolis/ St. Paul, MN	Tours	00-03-01	1.2
	MPI	Chicago, IL	M & IT	00-03-01	1.0
	Ski Group 99	Chicago, IL	Skiing	99-05-15	0.9
	Spotlight Canada	Detroit, MI	Tours	00-03-01	0.9
	Spotlight Canada	Chicago, IL	Tours	00-03-01	0.9
	Spotlight Canada	Cleveland, OH	Tours	00-03-01	0.9
	St. Louis Post Dispatch	St. Louis, MO	Tours	00-03-01	1.2
	St. Louis Society of Association Executives	St. Louis, MO	M & IT	00-03-01	1.0
<i>Total</i>	<i>Marketplaces</i>				31.3
Seminars					
	Miscellaneous		All	00-03-01	2.0
<i>Total</i>	<i>Seminars</i>				2.0
Consumer shows					
	Ambassador	Indianapolis, IN	Tours	99-09-01	1.0
	International Adventure Travel Show	Rosemont, IL	Adventure	00-02-01	4.0
	Mayflower Tours	Chicago, IL	Tours	00-03-01	0.5
	Ski show	Detroit, MI	Skiing	00-03-01	1.0
	Ski show	Cleveland, OH	Skiing	00-03-01	1.0
	Ski show	Chicago, IL	Skiing	00-03-01	1.0
<i>Total</i>	<i>Consumer shows</i>				8.4
Receptions					
	Corporate Accounts Dinner	Denver, CO	M & IT	00-03-01	1.5
	Corporate Accounts Dinner	St. Louis, MO	M & IT	00-03-01	1.0
	IT & ME Evening	Chicago, IL	M & IT	99-09-01	2.0
<i>Total</i>	<i>Receptions</i>				4.5
Total	Activities				46.2
Total	Chicago				46.2

OPERATING PLAN

DALLAS					
CATEGORY	ACTIVITY	CITY	PRODUCT	DATE	BUDGET (000 \$ CAN)
ACTIVITIES					
Marketplaces					
	AA Travel Expo	Miami, FL	Tours	99-10-28	1.8
	ASTA Great Americas	Miami, FL	Tours	99-06-10	0.9
	CTC Spotlight Canada	Miami, FL	Tours	99-09-01	1.5
	CTC Spotlight Canada	Dallas, TX	Tours	00-02-01	1.5
	CTC Spotlight Canada	Atlanta, GA	Tours	99-06-01	1.5
	Florida Road Show	Miami, Orlando, Tampa, Sarasota	Tours	99-04-05	1.2
	Florida Road Show	Orlando, Sarasota	Tours	00-03-01	2.3
	Florida Road Show	Miami, Boca, Tampa	Tours	99-11-01	2.3
	Hispanic Meeting Planners	Puerto Rico	M & IT	99-05-01	0.8
	ICPA	Bocaraton, FL	M & IT	99-11-01	10.0
	Limra Convention	Orlando, FL	M & IT	99-10-01	1.3
	Meeting Quest	Atlanta, GA	M & IT	99-09-15	3.1
	Meeting Quest	Dallas, TX	M & IT	99-11-04	3.1
	MPI PEC	Nashville, TN	M & IT	00-01-01	0.9
	MPI WEC	Philadelphia, PA	M & IT	99-07-12	0.9
	MPI-PEC (MONTREAL)	Nashville, TN	M & IT	00-01-01	8.0
	National Trade Shows	Houston, Dallas, San Antonio and Austin	Tours	99-04-26	4.0
	NTE	New Orleans, Atlanta, Alabama, Tennessee	Tours	99-09-27	4.9
	Québec Marketplace	New Orleans, LA- Birmingham, AL- Raleigh-Durham, NC	All	99-10-01	13.9
	Québec Marketplace	Dallas, TX- Atlanta, GA- Jacksonville, FL	All	00-03-01	13.9
	Showcase Canada	Dallas, TX	M & IT	99-11-01	1.0
	Showcase Canada	Atlanta, Georgia	M & IT	99-04-20	1.0
	SITE University of Incentive	New Orleans, LA	M & IT	99-06-19	1.0
	TAC Conference	Territory	Tours	00-02-01	0.9
	TAC Conference	Territory	Tours	99-09-01	0.9
	Tour Operator Society	Miami, FL	Tours	99-05-12	0.5
	Travel Trade	Miami, FL	Tours	99-06-03	1.2
<i>Total</i>	<i>Marketplaces</i>				<i>84.4</i>

DALLAS (cont'd)

CATEGORY	ACTIVITY	CITY	PRODUCT	DATE	BUDGET (000 \$ CAN)
Seminars					
	American Express	Houston, TX	Tours	99-07-01	1.5
	Brewster Seminars	Louisiana	Tours	99-06-01	0.9
	Brewster Seminars	Oklahoma, OK	Tours	99-06-01	0.9
	Brewster Seminars	Alabama, AL	Tours	99-06-01	0.9
	Brewster Seminars	Arkansas, AR	Tours	99-06-01	0.9
	Brewster Seminars	North and South Carolina	Tours	99-06-01	0.9
	CP Hotels	Dallas, TX	M & IT	99-11-01	0.8
	CP Hotels	Houston, TX	M & IT	99-11-01	0.8
	CP Hotels	Atlanta, GA	M & IT	99-11-01	0.8
	GOGO Tours	Houston, TX	All	99-05-01	1.5
	GOGO Tours	Florida	All	99-06-01	1.5
	MPI	Dallas, TX	M & IT	99-06-01	1.2
<i>Total</i>	<i>Seminars</i>				<i>12.8</i>
Consumer shows					
.	Adventure Travel	Dallas, TX	Adventure	00-02-01	1.4
.	Adventure/Outdoor Shows	Atlanta, GA	Adventure	00-03-01	1.2
.	Consumer Shows	Territory	Skiing	00-03-01	1.5
.	International Sport Show	North and South Carolina	Adventure	00-03-01	1.5
	Salon de ski	Fort Lauderdale, FL	Skiing	99-09-01	0.7
	Ski Group Shows	Houston, TX	Skiing	00-03-01	1.1
	Ski Group Shows	Dallas, TX	Skiing	00-03-01	1.1
.	Ski Group Shows	Atlanta, GA	Skiing	00-03-01	1.1
.	Ski Group Shows	Florida	Skiing	00-03-01	1.1
.					
<i>Total</i>	<i>Consumer shows</i>				<i>10.7</i>
Consumer promotions					
	1999 International Ballet	Territory	Tours	00-03-01	3.1
	Charity Organizations	Territory	Tours	00-03-01	7.4
	Dallas Opera Guild	Territory	Tours	00-03-01	3.1
	Radio Promotions	Territory	Tours	00-03-01	9.2
	Rennert World Travel	Territory	Tours	00-03-01	5.0
	TSAE Advertising	Territory	Tours	00-03-01	3.1
<i>Total</i>	<i>Consumer promotions</i>				<i>30.9</i>

DALLAS (cont'd)					
CATEGORY	ACTIVITY	CITY	PRODUCT	DATE	BUDGET (000 \$ CAN)
Receptions					
	Braves/Expo Game	Atlanta, GA	M & IT	99-09-01	3.9
	Canada Day	Atlanta, GA	M & IT	99-07-01	2.3
	Céline Dion Show	Dallas, TX	M & IT	99-04-02	1.2
	CP Hotels. CTC	Dallas, TX	M & IT	00-04-01	4.6
	Golf Tournament	Dallas, TX	M & IT	99-11-01	1.8
	Hockey Game	Atlanta, GA	M & IT	00-02-01	4.6
	Hockey Game	Nashville, TN	M & IT	00-03-01	4.6
	Québec Day	Orlando, FL	M & IT	00-01-01	15.4
<i>Total</i>	<i>Receptions</i>				38.5
Familiarization tours					
	Various tours	Territory	All	00-03-31	15.4
<i>Total</i>	<i>Familiarization tours</i>				15.4
Total	Activities				192.7
Total	Dallas				192.7

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LOS ANGELES

CATEGORY	ACTIVITY	CITY	PRODUCT	DATE	BUDGET (000 \$ CAN)
PROMOTION					
Press relations					
	Media Press Tours	Québec	All	00-03-01	80.0
<i>Total</i>	<i>Press relations</i>				<i>80.0</i>
Total	Promotion				80.0
ACTIVITIES					
Marketplaces					
	ASAE	San Diego	M & IT	99-08-01	23.1
	California Sales Week	California	M & IT	99-11-07	2.8
	IGLTA Annual Convention & Trade Show	Minneapolis	All	99-05-13	1.5
	International Ass. of Hispanic MC & IT		M & IT	99-05-01	4.6
	MPI Golf Classic Phoenix	Phoenix, AZ	M & IT	99-05-01	2.2
	MPI-PEC	Nashville, TN	M & IT	00-01-30	1.5
	MPI-WEC	Philadelphia, PA	M & IT	99-07-11	1.0
	NCC-MPI	San Francisco, CA	M & IT	00-02-01	1.5
	NCC-MPI Annual Golf	San Francisco, CA	M & IT	99-05-01	1.5
	Québec Marketplace	Los Angeles, Newport Beach, San Francisco,	All	99-09-01	18.5
	San Jose				
	Québec Marketplace	San Francisco, Oakland, Los Angeles, San Diego	All	00-03-01	18.5
	SCC-MPI	Los Angeles, CA	M & IT	99-11-01	0.9
	Showcase Canada	San Francisco, CA	M & IT	99-04-22	1.5
	SITE Arizona	Phoenix, AZ	M & IT	99-08-01	1.5
	Spotlight Canada NTE	California	All	00-03-01	6.2
	Swing Thru Canada	Los Angeles, CA	M & IT	99-06-07	4.6
	Tour EXPO 99		All	99-04-01	2.8
<i>Total</i>	<i>Marketplaces</i>				<i>94.4</i>
Seminars					
	Air Canada	Las Vegas, NV	Tours	00-03-01	1.5
	Air Canada	Phoenix, AZ	Tours	00-03-01	2.3
	Air Canada	San Francisco, CA	Tours	00-03-01	1.5
	Air Canada	Seattle, WA	Tours	99-05-28	1.5
	Tour-CTC-Air Canada	Southwest Tour	Tours	99-06-02	4.6
	Travelscope Air Canada	San Francisco, CA	All	99-05-28	1.6
	Travelscope Air Canada – CA	California	Tours	00-03-01	1.6
	Travelscope Seminar	Los Angeles, CA	Tours	99-05-16	2.0
<i>Total</i>	<i>Seminars</i>				<i>16.8</i>

OPERATING PLAN

LOS ANGELES (cont'd)					
CATEGORY	ACTIVITY	CITY	PRODUCT	DATE	BUDGET (000 \$ CAN)
Consumer shows					
	LA Times Travel Show	Los Angeles, CA	Tours	00-03-25	2.0
	Orange County Register Show	Orange County	Tours	00-02-01	3.4
<i>Total</i>	<i>Consumer shows</i>				
Consumer promotions					
	Visit Gay Friendly Québec 99		All	00-03-01	20.0
<i>Total</i>	<i>Consumer promotions</i>				20.0
Receptions					
	Cirque du Soleil	Los Angeles, CA	M & IT	99-10-09	15.4
	Cirque du Soleil	Los Angeles, CA	Tours	99-10-01	4.6
<i>Total</i>	<i>Receptions</i>				20.0
Familiarization tours					
	Various tours	Territory	All	00-03-01	9.0
<i>Total</i>	<i>Familiarization tours</i>				9.0
Total	Activities				165.6
Total	Los Angeles				245.6

NEW YORK – MEETINGS AND INCENTIVE TRAVEL (M & IT)

CATEGORY	ACTIVITY	CITY	PRODUCT	DATE	BUDGET (000 \$ CAN)
ACTIVITIES					
Marketplaces					
	Beyond Borders	New York, NY	M & IT	99-04-01	1.5
	Canada Showcase	Washington, DC	M & IT	99-11-01	1.4
	Canada Showcase	New York, NY	M & IT	99-11-01	1.4
	Meeting Place	Philadelphia, PA	M & IT	00-07-12	1.5
	Meeting World	New York, NY	M & IT	99-07-01	3.0
	MPI Education Day	New York, NY	M & IT	99-09-01	0.8
	MPI-PEC	Nashville, TN	M & IT	00-01-30	1.5
	MPI-WEC	Philadelphia, PA	M & IT	99-07-01	1.5
<i>Total</i>	<i>Marketplaces</i>				12.7
Seminars					
	Connecticut Sales Seminar		M & IT	00-03-01	0.3
	Maryland Sales Seminar		M & IT	00-03-01	0.3
	New Jersey Sales Seminar		M & IT	00-03-01	0.3
	New York Sales Seminar	New York, NY	M & IT	00-03-01	0.3
	Pennsylvania Sales Seminar		M & IT	00-03-01	0.3
	Upstate NY Sales Seminar		M & IT	00-03-01	0.3
	Virginia Sales Seminar		M & IT	00-03-01	0.3
	Westchester Sales Seminar		M & IT	00-03-01	0.3
<i>Total</i>	<i>Seminars</i>				2.5
Receptions					
	Montréal Canadians Hockey Club	Territory	M & IT	00-03-01	0.9
	Chef's Challenge	Philadelphia, PA	M & IT	00-03-01	7.7
	Chef's Challenge	New York, NY	M & IT	99-05-01	7.7
	Millenium Party – lion king	New York, NY	M & IT	00-01-01	30.8
	Mini Québec Day	Hartford, CT	M & IT	99-08-06	4.6
	Mini Québec Day	Princeton, NJ	M & IT	99-07-08	4.6
	Mini Québec Day	Virginia, VA	M & IT	99-08-26	4.6
	Montreal Expos	NY, NY	All	00-03-01	1.5
	MSO	New York, NY	M & IT	99-10-01	3.1
	MPI Chapter events	Territory	M & IT	00-03-01	1.5
	MPI Sponsorships	Territory	M & IT	00-03-01	3.1
	Québec Tasting party	NY, NY	M & IT	99-09-01	11.6
	Québec performers	Territory	M & IT	00-03-01	4.6
<i>Total</i>	<i>Receptions</i>				86.4
Familiarization tours					
	Cirque du Soleil Fam.	Montreal	All	99-05-01	3.1
	Golf/Resort Incentive Fam.	Mont-Tremblant	All	99-07-01	3.1
	Jazz Festival	Montreal	All	99-07-01	4.6
	CP Tour – New York Incentive	Mont-Tremblant and Montreal	M & IT	99-04-08	0.9
<i>Total</i>	<i>Familiarization tours</i>				11.7
Total	Activities				113.2
Total	New York – Meetings and incentive travel				113.2

NEW YORK – PLEASURE

CATEGORY	ACTIVITY	CITY	PRODUCT	DATE	BUDGET (000 \$ CAN)
ACTIVITIES					
Marketplaces					
	Educational Travel Alliance	Washington, DC	All	00-03-01	3.9
	Glamer Show	Atlantic City, NJ	Tours	99-05-14	0.9
	Glamer Show	Baltimore, MD	Tours	99-05-12	0.9
	Glamer Show	Albany, NY	Tours	99-05-05	0.9
	Glamer Show	Long Island, NY	Tours	99-05-20	0.9
	Glamer Show	White Plains, NY	Tours	99-05-21	0.9
	Glamer Show	Philadelphia N, PA	Tours	99-05-13	0.9
	NASTP Show	Long Island, NY	Tours	99-04-28	0.8
	NASTP Show	Hartford, CT	Tours	99-04-20	0.8
	National Trade Shows	NJ, NY, CT	All	99-09-27	4.0
	National Trade Shows	New York, NY	Tours	99-09-21	4.0
	National Trade Shows	VA, MD, DE, NJ	All	00-03-01	4.0
	Northeast Conf. TFL	New York, NY	All	99-04-08	1.8
	NTS Trade Shows	Pennsylvania, PA	Tours	99-04-12	4.0
	NTS Trade Shows	New Jersey, NJ	Tours	99-04-19	4.0
	PBA	Harrisburg, PA	Tours	00-03-28	1.2
	Pittsburgh Travel Show	Pittsburgh, PA	Tours	00-03-01	0.9
	Québec Marketplace	New York, NY	Tours	00-04-01	15.4
	Québec Marketplace	Washington, DC	Skiing	99-11-01	15.4
	Receptive Service Ass.	New York, NY	Tours	00-02-01	0.8
	Seaway Destinations Show	Buffalo, NY	Tours	99-10-01	0.8
	Skigroup '99	Pittsburgh, PA	Skiing	99-05-05	0.8
	Skigroup '99	Washington, DC	Skiing	99-04-26	0.8
	Skigroup '99	Philadelphia, PA	Skiing	99-04-27	0.8
	Skigroup '99	New York, NY	Skiing	99-04-29	0.8
	Skigroup '99	Secaucus, NY	Skiing	99-04-28	0.8
	Spotlight Canada	'Upstate', NY Series	Tours	00-03-10	2.3
	Teacher's Travel Fair	Hudson Valley, NY	All	99-10-25	0.5
	Travel Expo	New York, NY	Tours	00-03-11	1.2
	USTOA/Annual Meeting		All	00-03-01	7.7
	Westchester Agencies Show	Westchester, NY	Tours	00-03-29	0.6
Total	Marketplaces				83.5
Seminars					
	Eastern Ski Council	Philadelphia, PA	Skiing	00-01-01	1.2
	Gay & Lesbian	New York, NY	Tours	99-09-01	0.6
	New Jersey Jamboree	Wayne, NJ	Skiing	99-11-01	0.5
	Travel agents seminars	New Jersey, NJ	Tours	00-03-01	1.5
	Travel agents seminars	New York, NY	Tours	00-03-01	1.5
	Travel agents seminars	Philadelphia, PA	Tours	00-03-01	1.5
Total	Seminars				6.9

NEW YORK – PLEASURE (cont'd)

CATEGORY	ACTIVITY	CITY	PRODUCT	DATE	BUDGET (000 \$ CAN)
Consumer shows					
	AAA of Western Travel Show	Syracuse, NY	Tours	00-03-01	0.6
	AAA of Western Travel Show	Buffalo, NY	Tours	00-02-01	0.6
	Baltimore Sun Travel Expo	Baltimore, MD	Tours	00-02-01	1.5
	Big East Snowmobile Show	Syracuse, NY	Tours	99-10-08	3.1
	Going Places	Staten Island, NY	Tours	00-03-02	0.6
	Healthcare Conference & Expo.	Ledyard, CT	Tours	99-06-08	2.5
	International Super Law Show	New York, NY	Tours	99-12-08	3.1
	National Living Better Expo	New York, NY	Tours	99-06-02	4.0
	National Ski Show	Long Island, NY	Skiing	99-11-01	1.5
	National Ski Show	Washington, DC	Skiing	99-11-01	1.5
	National Ski Show	Philadelphia, PA	Skiing	99-10-01	1.5
	Travel Expo Summer	Albany, NY	Tours	99-05-12	0.5
	Travel Expo Winter	Albany, NY	Tours	99-10-20	0.5
	Van Zile Travel Expo'99	Rochester, NY	Tours	99-10-01	0.8
	Washington Post Fest'2000	Washington, DC	Tours	99-09-24	1.5
<i>Total</i>	<i>Consumer shows</i>				23.9
Receptions					
	International Inbound	New York	All	00-03-01	3.1
	Not for profit in travel – Annual Convention	Washington, DC	All	00-03-01	3.1
	Reception		All	00-03-01	7.7
<i>Total</i>	<i>Receptions</i>				13.9
Familiarization tours					
	Summer products	Territory	Tours	00-03-01	7.7
	Winter products	Territory	Tours	00-03-01	7.7
<i>Total</i>	<i>Familiarization tours</i>				15.4
Total	Activities				142.9
Total	New York – Pleasure				142.9

NEW ENGLAND

CATEGORY	ACTIVITY	CITY	PRODUCT	DATE	BUDGET (000 \$ CAN)
ACTIVITIES					
Marketplaces					
	AAA Southern NE 1998 Auto Travel	Fall River, MA	Tours	99-03-23	0.1
	Bienvenue Québec		All	99-10-01	0.0
	Boston Travel Professionals	Boston, MA	Tours	00-03-01	1.0
	Eco-evenings	Boston, MA	Adventure	00-03-01	0.5
	Sales mission to NE	MA, NH, VT	All	99-05-18	0.8
	Travel Exchange Trade Shows	Boston, MA	Tours	99-10-26	1.0
	Vermont Society of Travel	Burlington, VT	Tours	99-11-01	0.5
<i>Total</i>	<i>Marketplaces</i>				3.9
Seminars					
	Nemice	Boston, MA	M & IT	99-04-15	0.5
<i>Total</i>	<i>Seminars</i>				0.5
Consumer shows					
	AAA Southern NE 1998 Auto Travel	Worcester, MA	Tours	99-03-24	0.1
	Boston ShowSports Expo	Boston, MA	Skiing	99-11-01	0.0
	Eastern States Expo		Tours	00-03-01	0.2
	West Springfield				
	Glamer	Boston, MA	Stay in the city	99-05-19	0.5
	Glamer	Newport, RI	Stay in the city	99-05-06	0.5
	Northshore Mall Shopping Center Peabody		Tours	99-06-24	0.2
	Consumer shows	Boston, MA	All	99-05-19	0.5
	Consumer shows	Burlington, VT	All	99-05-18	0.5
	Consumer shows	Manchester, NH	All	99-05-20	0.5
	Travel Experience	Pawtucket, RI	Tours	99-10-27	1.0
	Travel Night	Barre, VT	Stay in the city	99-11-01	0.5
<i>Total</i>	<i>Consumer shows</i>				4.6
Consumer promotions					
	Auction Youville		Tours	99-05-01	2.5
	Boston's French library		Tours	00-03-01	2.0
	Faneuil Hall, Boston – Memorial Day		Tours	99-05-29	5.0
	Franco-American Jubilee		Tours	99-08-01	5.0
	Polo on Rhode Island	Rhode Island	All	99-08-01	5.0
	Promotion WCRB-FM	Boston, MA	All	00-03-01	15.0
	Revue Appalachian Mountain Club (AMC)	Territory	Tours	00-03-01	6.5
	Tangelwood		All	99-07-01	5.0
	Yankee Traveler Newsletter	Territory	Tours	00-03-01	5.0
<i>Total</i>	<i>Consumer promotions</i>				51.0

NEW ENGLAND (cont'd)

CATEGORY	ACTIVITY	CITY	PRODUCT	DATE	BUDGET (000 \$ CAN)
Receptions					
	Cirque du Soleil	Montreal	Stay in the city	99-05-21	0.3
	Québec Day	Boston, MA	M & IT	00-03-01	18.0
	Tour operators' evening	Boston, MA	All	00-03-01	2.0
<i>Total</i>	<i>Receptions</i>				<i>20.3</i>
Familiarization tours					
	Various tours		All	00-03-01	15.0
<i>Total</i>	<i>Familiarization tours</i>				<i>15.0</i>
Total	Activities				95.3
TRANSFER PROGRAM					
PPC – Partners outside Québec					
	Music Contact International		All	00-03-01	10.0
<i>Total</i>	<i>PPC – Partners outside Québec</i>				<i>10.0</i>
Total	Transfer program				10.0
Total	New England				105.3

OPERATING PLAN

PARIS					
CATEGORY	ACTIVITY	CITY	PRODUCT	DATE	BUDGET (000 \$ CAN)
PROMOTION					
Advertising					
	Trade press inserts	Territory	All	00-03-01	90.0
	Poster + radio campaign	Territory	All	00-03-01	80.0
	Television infomercial		All	00-03-01	100.0
	Magazine inserts in Québec Adventure	Territory	All	00-03-01	30.0
	Marketing direct industrie Belgique	Territory	All	00-03-01	0.0
	Consumer show operation	Territory	All	00-03-01	30.0
	Project and/or Consumer show operation	Territory	All	00-03-01	85.0
<i>Total</i>	<i>Advertising</i>				<i>415.0</i>
Publishing					
	Publications and promotional material	Territory	All	00-03-31	149.5
<i>Total</i>	<i>Publishing</i>				<i>149.5</i>
Press relations					
	Press travel	Territory	All	00-03-01	140.0
<i>Total</i>	<i>Press relations</i>				<i>140.0</i>
Total	Promotion				704.5
ACTIVITIES					
Marketplaces					
	ADONET	Paris, France	All	00-02-01	1.0
	BTF	Brussels, Belgium	Tours	99-11-01	5.0
	EIBTM	Geneva, Switzerland		99-05-18	0.0
	M & IT International	Paris, France	M & IT	99-10-23	15.0
	Meeting & Weltra	Brussels, Belgium	All	00-03-01	4.0
	Motivation Québec	Paris, Brussels	All	99-10-21	15.0
	Top Resa	Deauville, France	Tours	99-09-23	10.0
<i>Total</i>	<i>Marketplaces</i>				<i>50.0</i>
Seminars					
	Road Show Canada 3000	Strasbourg, Rennes, Lyon and Toulouse, France	All	99-10-01	12.0
<i>Total Seminars</i>					<i>12.0</i>

PARIS (cont'd)

CATEGORY	ACTIVITY	CITY	PRODUCT	DATE	BUDGET (000 \$ CAN)
Consumer shows					
	Country Show	Paris, France	Tours	99-05-14	2.0
	Foire de Caen	Caen, France	Tours	99-09-17	5.0
	Journées méditerranéennes	Île-sur-Sorgue, France	Tours	99-05-22	5.0
	L'art des jardins	Paris, France	Tours	99-05-01	1.5
	Mahana	Lyon, France	Tours	00-03-10	5.0
	Mondial du 2 roues	Paris, France	Tours	99-10-21	5.0
	Partir en hiver	Paris, France	Tours	99-11-06	7.0
	Rando Expo	Paris, France	Tours	00-03-01	10.0
	RandoExpo	Paris, France	Tours	99-04-09	10.0
	Salon des vacances	Brussels, Belgium	Tours	00-03-18	5.0
	Salon des vacances	Luxembourg, France	Tours	00-01-15	3.0
	Salon du tourisme	Nantes, France	Tours	00-02-11	6.0
	Salon mondial du tourisme	Paris, France	Tours	00-03-16	14.5
	Salon voyages et loisirs de Nice	Nice, France	Tours	99-04-23	4.0
	SITV Colmar	Colmar, France	Tours	99-11-11	4.0
	STV	Rennes, France	Tours	00-01-01	1.0
	Tourissima	Lille, France	Tours	00-02-25	4.5
	Tourissimo	Strasbourg, France	Tours	00-03-17	3.5
<i>Total</i>	<i>Consumer shows</i>				96.0
Consumer promotions					
	Promotion Groupe Delsey/CCT	France, United Kingdom, Germany	Tours	99-04-01	5.0
<i>Total</i>	<i>Consumer promotions</i>				5.0
Receptions					
	Product introduction	Paris, France	All	00-03-01	10.0
	Product introduction	Brussels, Belgium	Tours	00-03-01	5.0
<i>Total</i>	<i>Receptions</i>				15.0
Familiarization tours					
	Agence Havas Communication	Montréal	All	99-06-01	4.0
	Agences détaillantes Belgique		All	99-05-01	5.0
	Agences Motivation Belgique	Montréal, Québec, Charlevoix	All	00-01-01	5.0
	Agences Motivation France		All	00-03-01	5.0
	Other tours		All	00-03-01	4.0
	Tournée Spécialiste France CCT	Montréal, Québec	All	99-10-23	5.0
<i>Total</i>	<i>Familiarization tours</i>				28.0
Total	Activities				206.0

PARIS (cont'd)					
CATEGORY	ACTIVITY	CITY	PRODUCT	DATE	BUDGET (000 \$ CAN)
TRANSFER PROGRAM					
PPC – Partners outside Québec					
	Canada 3000 Adventure (NB and QC)	Territory	All	00-03-01	13.0
	Neckermann	Territory	All	00-03-01	5.0
	Vacances Air Transat	Territory	Tours	00-03-01	50.0
	Belgian tour operators	Territory	All	00-03-01	20.0
<i>Total</i>	<i>PPC – Partners outside Québec</i>				<i>88.0</i>
Total	Transfer program				88.0
Total	Paris				998.5

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LONDON

CATEGORY	ACTIVITY	CITY	PRODUCT	DATE	BUDGET (000 \$ CAN)
PROMOTION					
Advertising					
	C & IT Magazine / M & IT Magazine		All	00-03-01	10.0
	Canada Travel Planner and Canada Winter Guide Essentially America	Territory	All	00-03-01	35.0
	Consumer Advertising – CTC TV – CTC print/ direct mail		All	00-03-01	70.0
	Consumer Advt – Québec Solus Campaign	Territory	All	00-03-01	250.0
	Essentially Quebec	Territory	All	00-03-01	50.0
	Globespan / Similar Tour op.	Territory	All	00-03-01	40.0
	Selling Long Haul		All	00-03-01	5.0
	TTG/TW		All	00-03-01	10.0
<i>Total</i>	<i>Advertising</i>				<i>470.0</i>
Publishing					
	Publications and promotional material	Territory	All	00-03-31	74.8
<i>Total</i>	<i>Publishing</i>				<i>74.8</i>
Press relations					
	Public Relation Services in UK	Territory	All	00-03-01	70.0
	Press tours	Territory	All	00-03-01	40.0
<i>Total</i>	<i>Press relations</i>				<i>110.0</i>
Total	Promotion				654.8
ACTIVITIES					
Marketplaces					
	BA/CTC/ONT/BC – M&IT Promotion – CPH Major Sponsor	London, United Kingdom	M & IT	00-03-01	10.0
	Club Canada Series	Various, UK	All	00-03-01	3.0
	Confex	London, United Kingdom	M & IT	00-03-01	10.0
	Spotlight Canada	London, United Kingdom	All	00-03-01	10.0
	World Travel Market	London, United Kingdom	All	99-11-01	10.0
<i>Total</i>	<i>Marketplaces</i>				<i>43.0</i>

LONDON (cont'd)					
CATEGORY	ACTIVITY	CITY	PRODUCT	DATE	BUDGET (000 \$ CAN)
Seminars					
	ARTAC	Territory	All	00-03-01	2.5
	Canada Counselors	Territory	All	99-04-01	5.0
	Canada Seminars	Territory	All	00-03-01	10.0
	Canada Travel Specialists		All	99-06-01	2.5
	CTC Nordics	To be determined, Scandinavia	All	00-03-01	5.0
	Tour operator educationals	London	All	00-03-01	150.0
	Visit USA and Canada Workshop	To be determined, Denmark	All	00-03-01	3.0
<i>Total</i>	<i>Seminars</i>				<i>178.0</i>
Consumer shows					
	Destinations 2000	London, United Kingdom	All	00-02-01	10.0
	Dublin Show	Dublin, Ireland	All	00-01-01	5.0
	Holiday Show	Belfast, United Kingdom	All	00-02-01	2.5
	Holiday Show	Glasgow, United Kingdom	All	00-02-01	2.5
	Holiday Show G-Mex	Manchester, United Kingdom	All	00-01-01	9.0
	Ski Show	London, United Kingdom	Skiing	99-10-01	5.0
	Vakantie	Netherlands	All	00-01-01	4.0
<i>Total</i>	<i>Consumer shows</i>				<i>38.0</i>
Receptions					
	Canada Travel Awards	London, United Kingdom	All	00-03-01	3.0
	Céline Dion / or Gala Event	London, United Kingdom	All	00-03-01	5.0
	Cirque du Soleil	London, United Kingdom	All	00-01-01	10.0
	M & I T Awards	London, United Kingdom	M & IT	00-03-01	4.0
	Ontario Québec Evening	London, United Kingdom	All	00-03-01	4.0
	Series of Co-Hosted/ Partner Media and Trade Functions	Territory	All	00-03-01	5.0
<i>Total</i>	<i>Receptions</i>				<i>31.0</i>

LONDON (cont'd)

CATEGORY	ACTIVITY	CITY	PRODUCT	DATE	BUDGET (000 \$ CAN)
Familiarization tours					
	ABTA Prize Retail AGTS	Montreal, Québec	All	00-03-01	0.5
	Other tour		All	00-03-01	10.0
	CP Hotels	Charlevoix	All	00-03-31	0.5
	Incentive Organizers	Montreal-Québec	All	99-07-01	3.0
	Mont-Tremblant				
	Inghams	Mont-Tremblant	All	99-04-07	1.6
	M & IT Competition Prize		All	00-03-01	0.5
	Netherlands Tour Ops		All	00-03-01	3.0
	Selling Long Haul Prize-Trade		All	00-03-01	0.5
	Tour Ops Staff Educationals		All	00-03-01	2.0
	UK Tour Ops		All	99-06-01	5.0
<i>Total</i>	<i>Familiarization tours</i>				<i>27.3</i>
Total	Activities				317.3
TRANSFER PROGRAM					
PPC – Partners outside Québec					
	To be determined	Territory	All	00-03-01	50.0
<i>Total</i>	<i>PPC – Partners outside Québec</i>				<i>50.0</i>
Total	Transfer program				50.0
Total	London				1 022.0

OPERATING PLAN

VLOTHO					
CATEGORY	ACTIVITY	CITY	PRODUCT	DATE	BUDGET (000 \$ CAN)
PROMOTION					
Advertising					
	Consumer advertising campaign	Territory	All	00-01-01	270.0
	Trade advertising campaign	Territory	All	00-01-01	17.5
	Other CTC	Territory	All	00-03-01	25.0
	Summer CTC Encart	Territory	All	00-03-01	20.0
	Winter CTC Encart	Territory	All	00-03-01	5.0
	CTC Infomercial	Territory	All	99-12-01	75.0
	List of T.O.	Germany – Switzerland – Austria	All	00-03-01	10.0
	MC & IT	Territory	All	00-03-01	7.5
<i>Total</i>	<i>Advertising</i>				430.0
Publishing					
	Publications and promotional material	Territory	All	00-03-01	74.8
<i>Total</i>	<i>Publishing</i>				74.8
Press relations					
	Wilde & Partner public relations agency	Territory	All	00-03-01	180.0
	Press tours	Territory	All	00-03-01	40.0
<i>Total</i>	<i>Press tours</i>				220.0
Total	Promotion				724.8
ACTIVITIES					
Marketplaces					
	EIBTM	Geneva, Switzerland	M & IT	99-05-18	40.0
	Incentive Jahrmarkt	Cologne, Munich and Frankfurt	M & IT	99-11-01	7.0
	ITB	Berlin, Germany	All	00-03-01	18.5
	Travel Trade Work Shop (TTW)	Montreux, Switzerland	All	99-10-26	3.0
<i>Total</i>	<i>Marketplaces</i>				68.5
Seminars					
	Active Counter	Frankfurt, Germany	All	99-06-14	1.0
	Airtours Roadshow	Various, Germany	All	00-01-01	3.0
	Canada Roadshow	Various, Germany	All	99-10-01	3.0
	DER	Various, Germany	All	00-01-01	3.0
	Mission Germany	Frankfurt and Hamburg, Germany	All	99-09-13	20.0
	Post-EIBTM	Geneva, Switzerland	M & IT	99-05-20	5.0
<i>Total</i>	<i>Seminars</i>				35.0

VLOTHO (cont'd)

CATEGORY	ACTIVITY	CITY	PRODUCT	DATE	BUDGET (000 \$ CAN)
Consumer shows					
	CBR	Munich, Germany	All	00-02-01	4.1
	CMT	Stuttgart, Germany	All	00-01-01	4.1
	Ferien	Berne, Switzerland	All	00-01-01	4.3
	Ferien	Vienna, Austria	All	00-01-01	1.4
	FESPO	Geneva, Switzerland	All	00-02-01	4.3
	FESPO	Zurich, Switzerland	All	00-01-01	4.3
	Reisemarkt	Cologne, Germany	All	99-11-01	3.4
	Reisen	Hamburg, Germany	All	00-02-01	1.0
	TOURF	Salzburg, Austria	All	00-01-01	1.0
	Touristik Caravan	Leipzig, Germany	All	99-12-01	1.2
<i>Total</i>	<i>Consumer shows</i>				<i>29.2</i>
Receptions					
	Céline Dion concert	Cologne, Germany	All	99-07-03	3.0
	Céline Dion concert	Frankfurt, Germany	All	99-06-03	0.0
	Céline Dion concert	Munich, Germany	All	99-06-12	0.0
	EIBTM evening	Geneva, Switzerland	M & IT	99-05-18	7.5
	Austrian Happy Days evening	Vienna, Austria	Tours	99-04-01	2.0
	CMT evening	Stuttgart, Germany	Tours	00-01-01	1.0
	TTW night	Montreux Switzerland	Tours	99-10-25	1.0
<i>Total</i>	<i>Receptions</i>				<i>14.5</i>
Familiarization tours					
	Air Canada		Tours	99-10-01	3.0
	Austrian Happy Days		Tours	99-04-01	2.5
	Canada 3000		Tours	00-03-01	2.5
	CSP (Canada Specialist Program)		Tours	99-05-13	3.5
	Incentive		Tours	00-03-01	2.5
<i>Total</i>	<i>Familiarization tours</i>				<i>14.0</i>
Total	Activities				161.2
TRANSFER PROGRAM					
PPC – Partners outside Québec					
	Airtours	Territory	All	00-03-01	17.0
	Airtours		All	00-03-01	8.0
	Eest Reisen Germany	Territory	Tours	00-03-01	10.0
	Hotelplan		All	00-03-01	7.0
	ITV		All	00-03-01	7.0
	Kuoni		All	00-03-01	7.0
<i>Total</i>	<i>PPC – Partners outside Québec</i>				<i>56.0</i>
Total	Transfer program				56.0
Total	Vlotho				942.0

TOKYO					
CATEGORY	ACTIVITY	CITY	PRODUCT	DATE	BUDGET (000 \$ CAN)
PROMOTION					
Advertising					
	Cinema campaign	Territory	All	00-03-01	110.0
	Canada East Travel Guide	Territory	All	00-03-01	4.0
	Travel Journal Insert (autumn colours)	Territory	All	00-03-01	30.0
<i>Total</i>	<i>Advertising</i>				144.0
Publishing					
	Publications and promotional material	Territory	All	00-03-01	74.8
<i>Total</i>	<i>Publishing</i>				74.8
Press relations					
	Media canvassing	Territory	All	00-03-01	30.0
	Ontario-Québec Tourism News	Territory	All	00-03-01	10.0
	Press tours and television	Territory	All	00-03-01	55.0
<i>Total</i>	<i>Press relations</i>				95.0
Total	Promotion				313.8
ACTIVITIES					
Marketplaces					
	Kanata 1999	Tokyo, Osaka	All	99-10-01	40.0
	Québec DMO Mission	Nagoya and Osaka, Japan	All	00-02-01	35.0
<i>Total</i>	<i>Marketplaces</i>				75.0
Seminars					
	Industry – CTC	Nagoya, Japan	All	00-03-01	2.0
	Industry – CTC	Sapporo, Japan	All	00-03-01	2.0
	Industry – CTC	Osaka, Japan	All	00-03-01	2.0
	Industry – CTC	Fukuoka, Japan	All	00-03-01	2.0
<i>Total</i>	<i>Seminars</i>				8.0
Consumer shows					
	JATA 1999	Tokyo, Japan	All	99-11-30	10.0
<i>Total</i>	<i>Consumer shows</i>				10.0
Consumer promotions					
	Food Fair		All	99-10-01	10.0
<i>Total</i>	<i>consumer shows</i>				10.0

TOKYO (cont'd)

CATEGORY	ACTIVITY	CITY	PRODUCT	DATE	BUDGET (000 \$ CAN)
Receptions					
	Air Canada Golf Tournament	Osaka, Japan	All	00-03-01	4.0
	Québec Reception	Tokyo, Japan	All	00-03-01	6.0
	Québec Reception	Osaka, Japan	All	00-03-01	6.0
	The 22nd Canada Cup Golf Tournament	Ibaraki, Japan	All	99-05-01	3.0
<i>Total</i>	<i>Receptions</i>				<i>19.0</i>
Familiarization tours					
	Québec-Vermont tour		All	00-03-01	7.0
	Other tours	Territory	All	00-03-15	5.0
<i>Total</i>	<i>Familiarization tours</i>				<i>12.0</i>
Total	Activities				134.0
TRANSFER PROGRAM					
PPC – Partners outside Québec					
	To be determined	Territory	All	00-03-15	10.0
	Hankyu Express	Fukuoka, Japan	All	00-03-01	10.0
	International Topics				
	JR West/TIS	Territory	All	00-03-01	10.0
<i>Total</i>	<i>PPC – Partners outside Québec</i>				<i>30.0</i>
Total	Transfer program				30.0
Total	Tokyo				477.8

SOUTHEAST ASIA					
CATEGORY	ACTIVITY	CITY	PRODUCT	DATE	BUDGET (000 \$ CAN)
PROMOTION					
Advertising					
	Various	Southeast Asia	All	00-03-01	6.6
<i>Total</i>	<i>Advertising</i>				6.6
Press relations					
	Press tours	Asia	All	00-03-01	20.0
<i>Total</i>	<i>Press relations</i>				20.0
Total	Promotion				26.6
ACTIVITIES					
Marketplaces					
	Showcase Canada		All	99-10-01	4.5
	Taipei Travel Fair	Taipei	All	99-11-01	5.0
<i>Total</i>	<i>Marketplaces</i>				9.5
Seminars					
	Southeast Tour Operators	Southeast Asia	All	00-03-01	5.0
<i>Total</i>	<i>Seminars</i>				5.0
Receptions					
	Air Canada/ Canadian Airlines	Taipei	All	00-03-15	10.0
<i>Total</i>	<i>Receptions</i>				10.0
Familiarization tours					
	Various tours	Territory	All	00-03-01	3.4
	Malaysia-Singapore tour	Montreal, Québec	Tours	99-05-04	1.6
<i>Total</i>	<i>Familiarization tours</i>				5.0
Total	Activities				29.5
TRANSFER PROGRAM					
PPC – Partners outside Québec					
	CTC	Hong Kong	All	00-03-01	15.0
	CTC – CAI – Ontario	Taiwan	All	00-03-31	100.0
<i>Total</i>	<i>PPC – Partners outside Québec</i>				171.1
Total	Transfer program				115.0
Total	Southeast Asia				161.1

ITALY					
CATEGORY	ACTIVITY	CITY	PRODUCT	DATE	BUDGET (000 \$ CAN)
PROMOTION					
Advertising					
	CCT / CAI / wholesaler		All	00-03-01	100.0
<i>Total</i>	<i>Advertising</i>				<i>100.0</i>
Press relations					
	Press tours		All	00-03-01	20.0
<i>Total</i>	<i>Press tours</i>				<i>20.0</i>
Total	Promotion				120.0
ACTIVITIES					
Marketplaces					
	BIT	Milan	All	00-02-01	3.0
	SKIPASS	Modena	Skiing	00-03-01	1.5
	TTG Incontri	Riva del garda	All	00-03-01	6.0
<i>Total</i>	<i>Marketplaces</i>				<i>10.5</i>
Consumer shows					
	Exa	Brescia	All	00-02-01	1.7
	Gala TCI	Montréal	All	00-03-01	10.0
	Mont-Blanc (inuk)	Courmayeur	Adventure	00-03-01	5.0
	Signet Website	CCT	All	00-03-01	1.5
<i>Total</i>	<i>Consumer shows</i>				<i>18.2</i>
Receptions					
	BIT		M & IT	00-02-01	2.0
	Skipass		Skiing	00-03-01	2.0
	Tour de l'Île		Tours	00-03-01	2.0
<i>Total</i>	<i>Receptions</i>				<i>6.0</i>
Familiarization tours					
	Various tours		M & IT	00-03-01	5.0
<i>Total</i>	<i>Familiarization tours</i>				<i>5.0</i>
Total	Activities				39.7
TRANSFER PROGRAM					
PPC – Partner outside Québec					
	Various	Territory	All	00-03-31	50.0
<i>Total</i>	<i>PPC – Partners outside Québec</i>				<i>50.0</i>
Total	Transfer program				50.0
Total	Italy				209.7

SPAIN					
CATEGORY	ACTIVITY	CITY	PRODUCT	DATE	BUDGET (000 \$ CAN)
PROMOTION					
Press relations					
	TVE television project	Territory	All	00-03-01	30.0
	Media tours	Territory	All	00-03-01	5.0
<i>Total</i>	<i>Press relations</i>				35.0
Total	Promotion				35.0
ACTIVITIES					
Marketplace					
	FITUR	Madrid	Tours	00-01-01	3.0
<i>Total</i>	<i>Marketplaces</i>				3.0
Receptions					
	Québec evening (post-FITUR)	Barcelona	All	00-01-01	5.0
<i>Total</i>	<i>Receptions</i>				5.0
Total	Activities				8.0
TRANSFER PROGRAM					
PPC – Partners outside Québec					
	Various	Territory	All	00-03-31	10.0
<i>Total</i>	<i>PPC – Partners outside Québec</i>				10.0
Total	Transfer program				10.0
Total	Spain				53.0

MEXICO					
CATEGORY	ACTIVITY	CITY	PRODUCT	DATE	BUDGET (000 \$ CAN)
PROMOTION					
Press relations					
	Media tours	Territory	All	00-03-01	5.0
<i>Total</i>	<i>Press relations</i>				5.0
Total	Promotion				5.0
ACTIVITIES					
Marketplaces					
	Conozca Canada	Mexico	All	00-03-01	2.5
	CTC – winter	Territory	All	99-09-01	3.0
<i>Total</i>	<i>Marketplaces</i>				5.5
Receptions					
	Winter Promo	Territory	All	00-03-01	5.0
<i>Total</i>	<i>Receptions</i>				5.0
Total	Activities				10.5
TRANSFER PROGRAM					
PPC – Partners outside Québec					
	Various	Territory	All	00-03-31	25.0
<i>Total</i>	<i>PPC – Partners outside Québec</i>				25.0
Total	Transfer program				25.0
Total	Mexico				40.5

BRAZIL					
CATEGORY	ACTIVITY	CITY	PRODUCT	DATE	BUDGET (000 \$ CAN)
PROMOTION					
Advertising					
	Interpoint	Territory	All	00-03-01	18.5
	Panrotas	Territory	Tours	00-03-01	3.0
<i>Total</i>	<i>Advertising</i>				<i>21.5</i>
Press relations					
	Media tour	Territory	All	00-03-01	5.0
<i>Total</i>	<i>Press relations</i>				<i>5.0</i>
Total	Promotion				26.5
ACTIVITIES					
Marketplaces					
	ABAV		All	00-03-01	3.0
	CVC Viagens E Turismo workshops	Sao Paulo, Brazil	All	99-05-13	1.3
	BRAZTOA	Sao Paulo, Brazil	All	00-03-01	7.0
	FIT	Buenos Aires, Argentina	All	99-10-01	1.5
<i>Total</i>	<i>Marketplaces</i>				<i>12.8</i>
Total	Activities				12.8
Consumer shows					
	Expo Todo Ski	Buenos Aires, Argentina	All	99-05-27	1.1
<i>Total</i>	<i>Consumer shows</i>				<i>1.1</i>
Familiarization tours					
	Intercamp	Montreal	Tours	99-03-02	0.7
<i>Total</i>	<i>Consumer shows</i>				<i>0.7</i>
Total	Activities				14.6
TRANSFER PROGRAM					
PPC – Partners outside Québec					
	Various	Territory	All	00-03-31	15.0
<i>Total</i>	<i>PPC – Partners outside Québec</i>				<i>15.0</i>
Total	Transfer program				15.0
Total	Brazil				56.1

AUSTRALIA

CATEGORY	ACTIVITY	CITY	PRODUCT	DATE	BUDGET (000 \$ CAN)
PROMOTION					
Advertising					
	Advertising	Territory	All	00-03-01	5.0
<i>Total</i>	<i>Advertising</i>				<i>5.0</i>
Press relations					
	Media tours	Territory	All	00-03-01	5.0
<i>Total</i>	<i>Press relations</i>				<i>5.0</i>
Total	Promotion				10.0
ACTIVITIES					
Seminars					
	Corroborees	Territory	Tours	00-03-01	4.0
<i>Total</i>	<i>Seminars</i>				<i>4.0</i>
Familiarization tours					
	Tours	Territory	Tours	00-03-01	5.0
<i>Total</i>	<i>Familiarization tours</i>				<i>5.0</i>
Total	Activities				9.0
TRANSFER PROGRAM					
PPC – Partners outside Québec					
	Various	Territory	All	00-03-31	5.0
<i>Total</i>	<i>PPC – Partners outside Québec</i>				<i>5.0</i>
Total	Transfer program				5.0
Total	Australia				24.0

NEW ZEALAND					
CATEGORY	ACTIVITY	CITY	PRODUCT	DATE	BUDGET (000 \$ CAN)
PROMOTION					
Advertising					
	Advertising – CCT	Territory	All	00-03-01	3.0
<i>Total</i>	<i>Advertising</i>				3.0
Press relations					
	Press tours	Territory	All	00-03-01	2.5
<i>Total</i>	<i>Press relations</i>				2.5
Total	Promotion				5.5
ACTIVITIES					
Marketplaces					
	Canada Calls	Territory	All	00-03-01	1.0
<i>Total</i>	<i>Marketplaces</i>				1.0
Total	Activities				1.0
TRANSFER PROGRAM					
PPC – Partners outside Québec					
	Various	Territory	All	00-03-31	5.0
<i>Total</i>	<i>PPC – Partners outside Québec</i>				5.0
Total	Transfer program				5.0
Total	New Zealand				11.5

TOURISM

IN QUÉBEC

VOLUME OF TOURISTS ('000)				
Market of origin	1995	1996	1997	1998
United States	1 946	1 920	1 890	2 041
• New England	669	660	700	700
• Atlantic Centre	541	545	473	473
• Atlantic South	238	213	200	200
• Centre Northeast	222	219	202	202
• Pacific	128	112	107	107
Other international markets	1 095	1 242	1 225	1 201
• France	366	390	386	361
• United Kingdom	114	118	112	121
• Germany	78	107	87	94
• Japan	55	65	53	54
Sub-total, international tourism	3 041	3 162	3 115	3 242
Other provinces of Canada	n.c.	n.c.	2 658	2 711
Québec	n.c.	n.c.	11 463	13 182
Total	n.c.	n.c.	17 236	19 135

Source: Statistics Canada.

n.c. : Not comparable. Data contained in the Canadian Travel Survey for 1995 and 1996 is not indicated because it cannot be compared to data of preceding years.

Data entered for 1998 are estimates made by Tourisme Québec that are based on actual results for the first nine months.

TOURIST SPENDING (\$000,000)

Market of origin	1995	1996	1997	1998
United States	762	853	804	934
• New England	180	207	205	260
• Atlantic Centre	225	273	208	210
• Atlantic South	111	110	103	136
• Centre Northeast	96	128	101	112
• Pacific	68	60	61	67
Other international markets	837	959	988	978
• France	328	369	355	337
• United Kingdom	51	55	85	84
• Germany	47	65	64	68
• Japan	44	52	48	50
Sub-total, international tourism	1 599	1 812	1 792	1 912
Other provinces of Canada	n.c.	n.c.	549	593
Québec	n.c.	n.c.	1 372	1 646
Total	n.c.	n.c.	3 713	4 151

Source: Statistics Canada.

n.c. : Not comparable. Data contained in the Canadian Travel Survey for 1995 and 1996 is not indicated because it cannot be compared to data of preceding years.

Data entered for 1998 are estimates made by Tourisme Québec that are based on actual results for the first nine months.

THE PUBLISHING PROGRAM

PRODUCT	Print run	Language
Standard brochure (Québec-America)	30 000	Portuguese
Special events / Calendrier des manifestations (Summer, winter)	165 000 205 000	French English
Accommodations in Québec / Hébergement Québec	140 000 110 000	French English
ACTA-Vacances Québec sales handbook	(Winter) 500 (Summer) 500	French
Introductory leaflet (new)	100 000 300 000 25 000 25 000 25 000 15 000 25 000	French English Spanish German Italian Portuguese Japanese
Fishing and Hunting Packages		English
Meeting in Québec (update)	8 000	English
Leaflet of what's new	1 000 500	French English
<i>Toute la chaleur de l'hiver /</i> Warm Up Winter brochure	20 000 15 000	French English
Ski Québec booklet	20 000	English
Getaway tours	200 000	N.D.
Theme tours	30 000 450 000	French English
Cross-country skiing booklet	10 000 10 000	French English
Casino folder	120 000 210 000	French English
Aboriginal tourism booklet	N.D.	N.D.
<i>Destination excellence</i> brochure	1 400 000 425 000	French English
"Collection" universal calling card	35 000	

THE CANVASSING TEAM

CITY	Name	Telephone Fax E-mail	Target markets
New York	Alberto Marte (Pleasure) Roberta Horton (Conventions, incentive travel)	(718) 657-1727 (718) 206-9114 pablomarte@msn.com (212) 317 1711 (212) 317-1881 110354.500@compuserve.com	Atlantic Centre and parts of Atlantic South north of North Carolina
Chicago	Under recruitment		Centre Northeast and Centre Northwest
Dallas	Sandy Mukitarian	(972) 414-7013 (972) 495-7660 110010.3060@compuserve.com	Centre Southwest and part of Atlantic South, south of Virginia
Los Angeles	Fair Gordon	(310) 656-9611 (310) 656-9614 fairgordon@worldnet.att.net	Pacific and Mountain
Paris	Barbara di Stefano	(011) 33-1-44-77-87-80 (011) 33-1-44-77-87-81 dquebec@club-internet.fr	France Belgium
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