

# MARKETING PLAN

1998 • 1999

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## FOREWORD

The 1997-1998 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.

David Cliche

A handwritten signature in dark blue ink, consisting of a large, stylized 'D' followed by a horizontal line that ends in a small upward curve.

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 over the past two years and the outlook for the coming year.

#### ■ 1996: good performance on overseas markets

The growth initiated in 1993 was maintained in 1996, though Québec as a tourist destination turned in an uneven performance. For instance:

- For overseas markets, the strong growth achieved since 1993 continued. The number of tourists and revenue rose by 13% (+145 000) and 15% (+\$121 million) respectively.
- For the American market, tourism revenue rose 12% (+\$91 million), particularly as a result of longer average stays. However, the number of tourists dipped by 1% (-29 000).
- For the Québec and Canadian markets, the results of the Canadian Travel Survey are currently being validated. However, the number of rooms occupied in hotel establishments in Québec fell 2.3%, indicating a decline in domestic tourism. It is highly likely that the torrential rain in the Saguenay–Lac-Saint-Jean, Charlevoix and Manicouagan tourist regions at the height of the tourist season contributed to a decline in custom.

Thanks in particular to the good performance of international markets, Québec's tourism deficit fell by \$91 million, to \$547 million. Overall, the number of international tourists in Québec in 1996 rose by 3.8%, which is slightly below the world performance (5.5%). However, as far as international tourism revenue is concerned, Québec's results (+13.2%) are better than the world average (+8.0%).

This overall performance also holds for *pleasure tourism*, where Tourisme Québec concentrates most of its promotional investments. Compared with 1995:

- the number of tourists was up 2% and revenue, 8%;
- overseas markets stood out; the number of tourists rose by 13% and revenue, 12%.

The same upward trend was observed in Tourisme Québec's second activity sector, *business and convention tourism*:

- the number of tourists rose 6%; revenue, 8%;
- overseas markets also figured prominently; business and convention volume was up 14%; revenue, 11%.

### ■ 1997: slower growth

Preliminary results for 1997 indicate that after three years of strong growth overall tourism performance in Québec in 1997 slowed down somewhat (cf. Appendix 1). This is attributable notably to a decline in American tourism in terms of both volume and revenue. However, this decline is partially offset by better results on other international markets. In 1997, tourism revenue from international markets other than the United States is expected to top **\$1 billion** for the first time, an increase of 87% since 1993. However, the rate of growth of these markets plunged in 1997 so that, overall, international tourism in Québec fell for the first time since 1993. This situation is not unique to Québec. Ontario also expects a decline of 1% in its international tourism revenue in 1997.

Turning to domestic markets (Québec and Canada), while the data of the Canadian Travel Survey are unusable, it is estimated that 1997 was a better year than 1996. The number of occupied rooms in hotel establishments in Québec rose 4.3%, compared with a decline of 2.3% in 1996. Since international tourism declined slightly by volume, this result can only be due to an increase in domestic tourism. In some regions, whose clientele is mainly from Québec, the increase in the number of occupied rooms even exceeded 10%. In particular, this was the case in Saguenay–Lac-Saint-Jean, Charlevoix and Gaspésie.

In spite of this slowdown, the tourism deficit should continue to fall in 1997. Trips by Quebecers outside Canada were down by 4.2%, while those of Ontarians outside Canada rose 1.8%. Our estimates indicate that the deficit should amount to \$451 million, down 17%.

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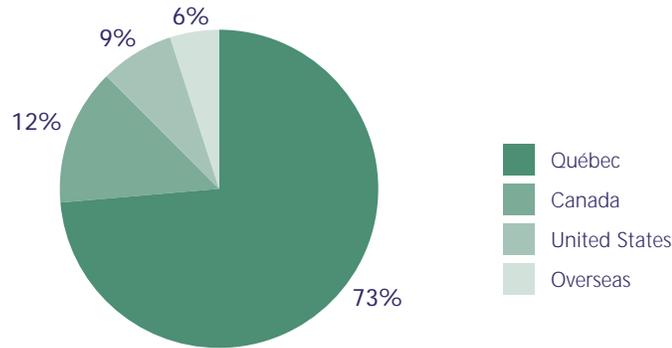
### ■ 1998: continued growth expected in spite of a difficult environment

The economic outlook in Québec's target markets varies greatly. In Québec, Canada, the United States and Europe, economic growth is expected to range from 2% to 3% according to the International Monetary Fund (IMF). On the other hand, GDP is expected to shrink in many Asian countries, while economic growth will be stagnant in Japan.

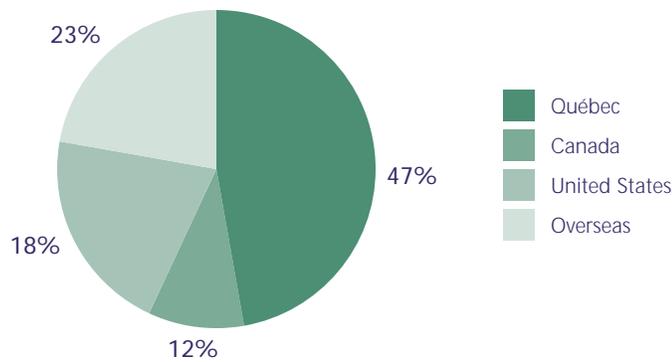
At the same time, tourist competition will intensify, particularly from our powerful neighbours to the south. The United States launched a broad offensive last year to recover the market share lost to competitors since the beginning of the decade on the international tourism market. To do so, a new agency was created, the *United States National Tourism Organization*. This agency wants to increase the promotional investments of the American tourism industry and has targeted the same markets as Québec. This offensive also threatens our domestic market, since Canada is included in the priority group of the target markets.

In spite of this difficult context, the Canadian Tourism Research Institute forecasts higher tourism revenue and volume in Québec for most of its target markets.

*Distribution of the 21 million tourists in 1997*



*Distribution of the \$4.3 billion in tourism revenue in 1997*



■ Québec is performing well compared to the competition

From 1993 to 1996, Québec increased its share of the Canadian international tourism market:

- For the American market, Québec maintained its position. Market share remained stable as far as volume of tourists is concerned (13.4%) Québec's share of tourism revenue (16.6%) rose slightly, by one percentage point. During the same period, British Columbia achieved similar performance, while Ontario's market share dropped two percentage points both in terms of volume and revenue.
- For other international markets, Québec increased its market shares. From 1993 to 1996, the increase was 0.6 points for number of tourists (20.3%) and 2.0 points in terms of revenue (21.2%). Of the four largest provinces, Québec recorded the best performance.

In 1997, preliminary results indicate that Québec's share of the American market has dropped, mainly in favour of British Columbia. As far as other international markets are concerned, Québec's market share should rise by about one percentage point, while Ontario will gain 3 to 4 points, and British Columbia will lose 5 to 6 points.

## GUIDELINES

### AND OBJECTIVES

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

#### ► 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, the results for 1997 show quite clearly that Québec, like the other provinces, cannot rely solely on the value of the Canadian dollar to maintain this rate of growth. Client segmentation and more intense competition mean that Québec will have to target its tourist marketing much more precisely to maintain this momentum. Accordingly, Tourisme Québec intends to focus on two areas over the coming years:

- a more distinctive positioning for Québec
- more refined marketing strategies. As such, in 1998-1999 Tourisme Québec will concentrate on
  - renewing client groups on the Québec market;
  - intensifying promotional efforts on international markets by targeting high-yield client groups on growth markets;
  - support for networking of tourism contractors;
  - a revision of Québec's three-year tourism marketing strategy.

#### ► GROWTH OBJECTIVES

Annual growth objectives for Québec's tourism revenue have been set for the next three years (1998-2001) for the following major markets:

- Québec : 4%
- Other provinces of Canada : 4%
- United States : 3%
- Other international markets : 5%

These objectives are less ambitious than they were in recent years because they reflect significant changes in the environment which will affect Québec's tourism performance which lies beyond the control of Tourisme Québec.

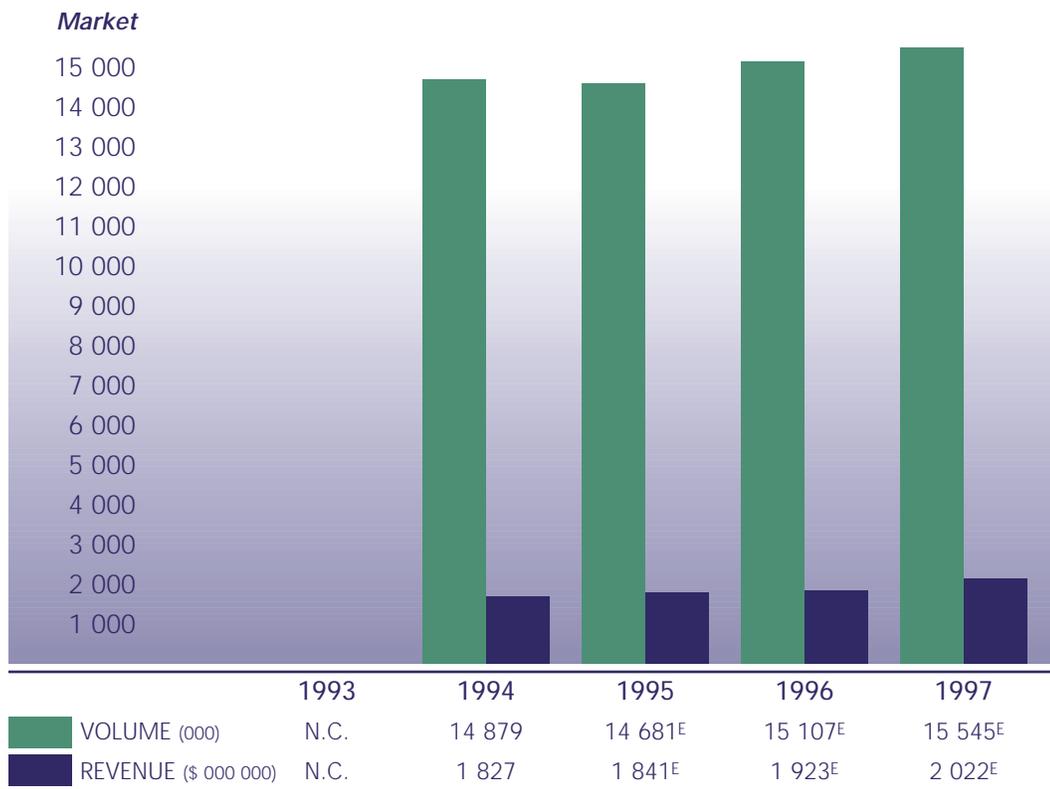
## MARKETS:

### 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 improve the performance of each market.

#### ► THE QUÉBEC MARKET



N.C.: Because of a change in methodology, the data are not comparable with those of subsequent years.

E: Estimate, because the results of the Canadian Travel Survey for 1996 and 1997 are currently being validated.

#### ■ A market in need of renewal

The Québec market is the prime market for Québec's tourism industry, particularly for tourist regions other than Montréal and Québec City. However, the market is fragile where travel decisions are often taken at the last minute. Accordingly, this decision is affected, more than for other markets, by imponderables that have a considerable bearing on market performance. Such 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 Montréal and Québec City. Indications relating to commercial lodging are that 1997 will be a good year. Some regions,

such as Saguenay-Lac-Saint-Jean, which focused on increased media visibility, obtained the results expected. 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.

Québec is promoted among domestic consumers as a tourist destination primarily by regional tourism associations. In 1997-1998 they invested more than \$8 million, notably because of the financial support they received from Tourisme Québec. In addition, Tourisme Québec also spent \$1.4 million on positioning Québec as a tourist destination accordingly. The total promotional investment approaches \$10 million. This is a substantial amount, and the more or less lacklustre performance on this market requires a reassessment of strategies. Future strategies to be developed for the Québec market stem from the following strengths and challenges identified by Tourisme Québec and the RTAs.

### *Strengths and opportunities*

- The advertising campaign "Besoin de vacances" (Need a vacation?) achieved a very high recognition rate: 63% of those asked said they were familiar with the new campaign.
- Packaging of certain tourism products (city tourism, resorts, alpine skiing) grew significantly as a result of the publication of vacation package guides (CAA, 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 has increased as a result of television campaigns.

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### *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. The "Need a vacation?" campaign does not focus sufficiently on concrete tourist experiences.
- 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 that can 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 the conversion of 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 Montréal 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 under-developed.
- Local competition is intensifying:
  - The number of Québec tourists traveling to New Brunswick rose significantly in 1997 as a result of an intensive advertising campaign by that province in Québec (investment of \$1.3 million), which is to be repeated in 1998.
  - The Canadian Tourism Commission is encouraging residents of the Toronto, Montréal and Vancouver regions to visit Canada.

## ■ Strategies and priorities for action

Objective: Renew interest in Québec as a destination

### *Positioning*

The new positioning of Québec on the domestic market will focus on the notion of **discovery**. It can be summed up as follows:

*Vacationing in Québec means discovery. Discovering the countryside, new activities, local colours, flavours and culture. Québec has a wide variety of destinations offering facets and experiences that change with the seasons and go with any mood:*

- *Looking for action? Head for the city;*
- *Looking for romance? A country inn is waiting just for you;*
- *Looking for adventure? Climb a mountain or go white-water rafting;*
- *Looking for a family vacation? Check out the festivals and tourist attractions.*

*Québec has everything to please. You'll find something for every taste in Québec.*

### *Target markets*

Montréal and Québec City metropolitan regions (French, English).

### *Target clientele*

Childless couples (25-45)  
 Seniors (55 or over)  
 Families (with children)  
 Active young adults and young singles

### *Theme*

***"L'appel des vacances"***  
***"The Call of Québec"***

■ Québec market promotional campaign visual



**The *Call* of Québec**  
**1 800 363-7777**



**L'*appel* des vacances**  
**1 800 363-7777**

## *MARKETING STRATEGY*

### *Advertising*

- A new television campaign with five 30-second messages, three in French, one in English for the summer period, and one in French for the winter period.
- Continue the winter promotion partnership with the Association des stations de ski du Québec and GM.

### *Press relations*

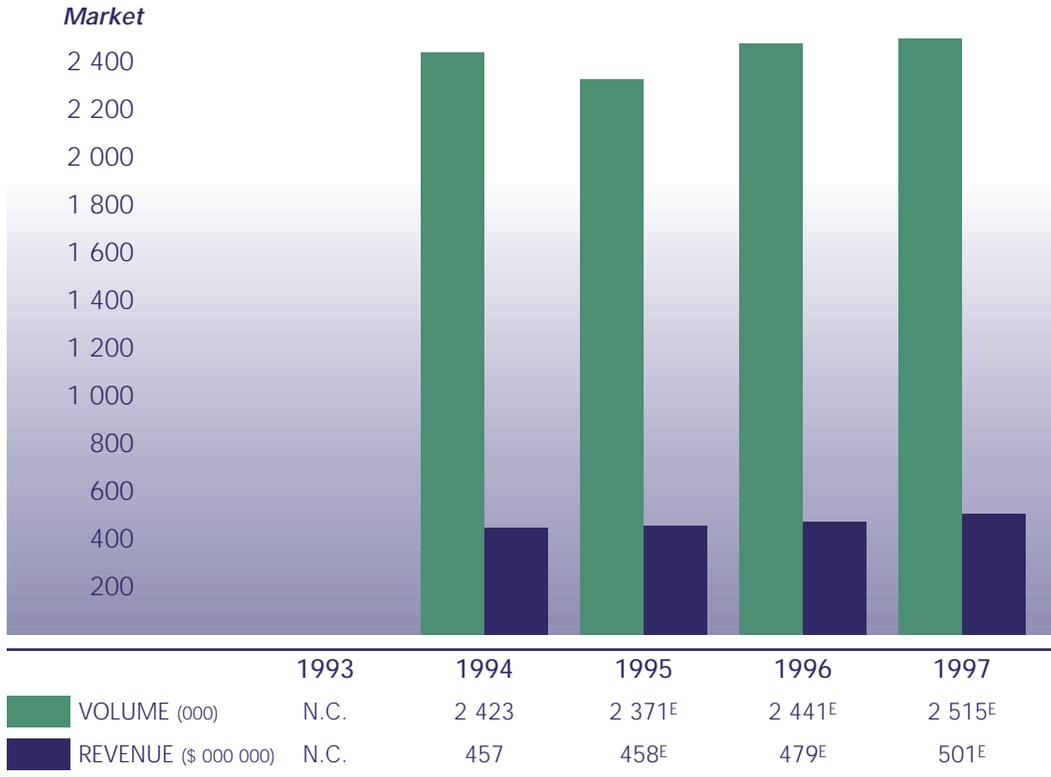
- Publish a bimonthly newsletter and four quarterly bulletins.
- Organize 10 group tours and 50 individual tours.
- Organize a seminar on press relations for partners of the Service des relations de presse.
- Work with a number of regional tourism associations in organizing meetings with the press.
- Contribute to filming a number of television broadcasts.

### *Distribution*

- Continue the pilot project with ACTA Vacances Québec.
- Support the distribution in one million homes of a vacation package booklet produced by CAA-Québec and Kilomètres Voyage.
- Produce and distribute a million copies of Destination excellence, in cooperation with GM and IGA, to promote the winners of the Grands Prix du tourisme (tourism awards of excellence).

► THE NORTH AMERICAN MARKET

The Canadian Market



N.C.: Because of a change in methodology, the data are not comparable with those of subsequent years.  
E: Estimate.

■ A market concentrated in Ontario and well-disposed to visiting 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 Montréal (one hour by plane, five hours by car, four hours by rail) help 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).
- Last year, Québec increased its promotional effort on the Ontario market, particularly with a summer and winter advertising campaign and direct mail advertising of vacation packages, in cooperation with the Société des fêtes et festivals du Québec.
- Québec enjoyed excellent press coverage last year. The publicity value of articles on Québec exceeded \$20 million.
- Ontario's economy is growing vigorously. It is expected to grow by 5% in 1998 and consumer confidence is up. These factors bolster Ontarians' propensity to travel.

*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.

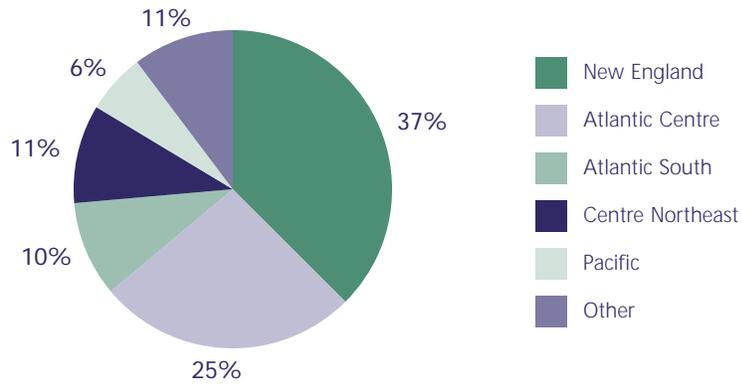
■ **Strategies and priorities for action**

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 the section on the American market.

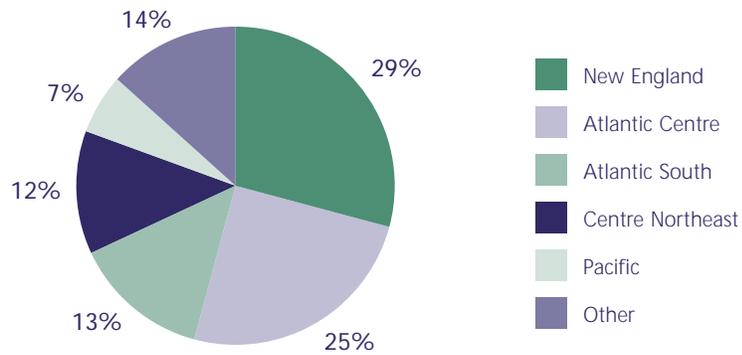
## The American Market

### ■ Internal breakdown of volume and revenue in 1997

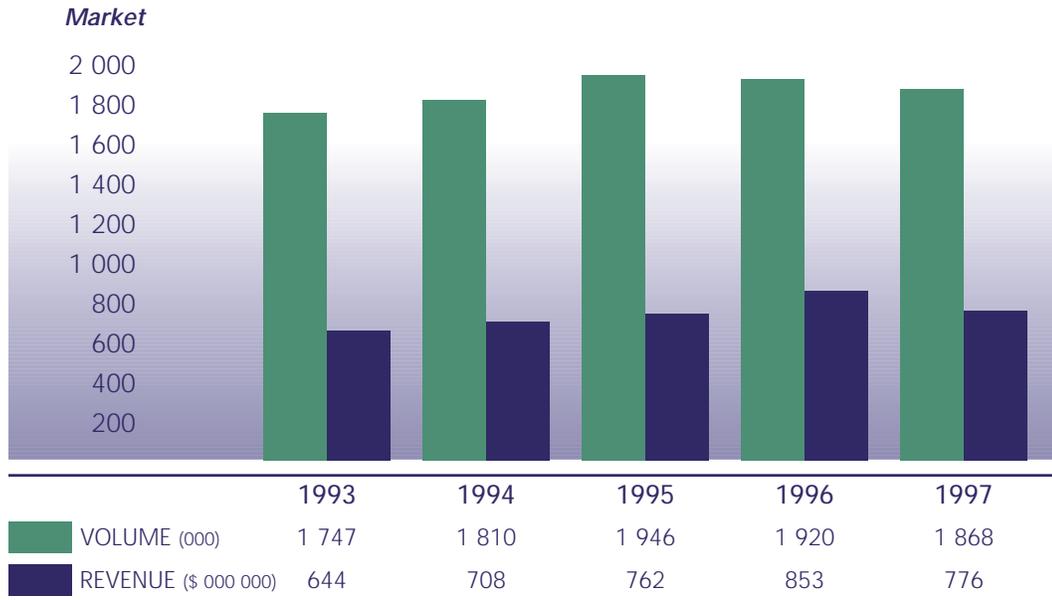
*Distribution by region of the 1.9 million American tourists in 1997*



*Distribution by region of the \$775 million in tourism revenue in 1997*



■ A demanding market with tremendous potential



- After declining from 1991 to 1993, 1994 and 1995 were excellent for American tourism to Québec: both the number of tourists and tourist spending rose.
- However, over the last two years there has been a downturn in this market: the number of tourists fell and revenue, after a strong increase in 1996, dropped substantially in 1997.
- Despite significant investments by Tourisme Québec on the American market, the number of American tourists visiting Québec in 1997 was the same as in 1990. However, this stagnation also affects most other destinations in Canada.
- As far as pleasure tourism is concerned,
  - the results for 1997 exceed the overall market performance for all types of tourism: even though revenue fell compared with 1996, the number of tourists was up slightly;
  - the proportion of tourists traveling by plane is rising: from 1994 to 1996, it went from 11% to 15% of volume and from 20% to 26% of revenue. The opposite applies to bus travel: from 1994 to 1996, the number of tourists traveling by bus fell from 15% to 10% of the total, and revenue declined from 13% to 6%.
- Preliminary results for business and convention tourism in 1997 indicate a decline in volume (about 6%) but a slight increase in revenue (3%).

*Strengths and opportunities*

- The promotional partnership with Québec and American partners (ATR, Air Canada, AT&T, Hertz, CP Hotels, GoGo Tours, Yankee Holidays, Northwest Airlines, Radisson, Delta Vacations, Liberty, Collette Tours, USTOA, American Airlines Vacations, etc.) is growing.
- The two vacation package booklets (summer and winter) produced since 1995 are encouraging American consumers to purchase Québec tourism products.



### *Challenges*

- The partnership with the Canadian Tourism Commission has taken a new direction: CTC investments will no longer necessarily be made according to Québec's priorities, since the CTC has stopped providing direct support for our campaign on the American market.
- Americans are most familiar with Montréal and Québec City. The level of recognition of other tourist regions is low, as is that of Québec as a destination.
- Our promotional efforts are hampered by certain prejudices regarding Québec (language, the cold winters, high cost of living).
- The tourism products offered to client groups in primary markets are too traditional. Products relating to nature, in particular resort tourism, and to culture are poorly positioned.
- Certain niche markets remain under-developed. 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 only have two weeks of annual vacation 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 C\$200 million in 1998-1999 to promote domestic tourism.

### ■ Strategies and priorities for action

Objective: To target promotional activities more intensely

### *Positioning*

Tourisme Québec will promote the following **tourism experiences**:

- city tourism
- tours
- resort tourism
- adventure tourism
- hunting and fishing
- alpine skiing, cross-country skiing, snowboarding
- snowmobiling

It will feature the variety of tourism experiences available in Québec, beyond the traditional tourism products familiar to Americans. It will target consumers with a demonstrated interest in this type of experience. In addition, Tourisme Québec will support the activities of the Montréal and Québec City tourism bureaus regarding conventions, business meetings and incentive travel.

*Target markets*

- Canada - The Metropolitan Toronto region
- United States/  
Primary - New England
- Atlantic Centre
- United States/  
Secondary - Atlantic South
- Centre Northeast
- Pacific

*Target client groups*

MARKETS	CONSUMERS	INDUSTRY
Canada United States/ Primary	Aged 35-54 with family income in excess of \$50 000	tour operators travel agents automobile clubs travel writers
United States/ Secondary	55 or over family income in excess of \$75 000	tour operators travel agents automobile clubs travel writers

*Theme*

All promotion vehicles use the advertising slogan ***“Québec, Closer Than You Think”*** and show the Tourisme Québec 1 800 number and Web address.

**MARKETING STRATEGY**

*Advertising*

The campaign will be divided into three parts:

- Pleasure/summer/fall: from March 1998 to October 1998
- Pleasure/winter: from September 1998 to March 1999
- Business: from April 1998 to March 1999

The campaign will incorporate a number of communications channels. However, two initiatives are worth mentioning:

- mass distribution of the *Vacation Packages* booklet to offer concrete products to as many consumers as possible;
- reactivation of resort tourism and soft adventure tourism through more targeted direct marketing.

The following communications channels will be used, depending on the campaign:

CHANNEL	PLEASURE/SUMMER 1998	PLEASURE/WINTER 1998-1999
Booklets	3 400 000 copies of the vacation packages booklet	1 400 000 copies of the vacation packages booklet
Dailies	Advertisements in major dailies and insertion of the vacation packages booklet	Advertisements in major dailies and insertion of the vacation packages booklet
Consumer magazines	3 600 000 inserts	Advertisements and inserts
Trade magazines	Advertising targeting travel agents and automobile clubs	Advertisements and insertion of 80 000 copies of the booklet
Television	Ads for certain products on certain American networks	Ads on certain products and broadcasting of a program on Christmas in Québec
Trade fax	Monthly fax to 8 500 travel agents and automobile clubs, 1 500 travel wholesalers and travel writers	Monthly fax to 8 500 travel agents and automobile clubs, 1 500 travel wholesalers and travel writers
Direct marketing	250 000 copies of promotional items to a pre-determined target client group	200 000 copies of the booklet and mailings of one or more specific items
Tourist fulfillment centre	Reply to requests for information	Reply to requests for information
Internet	Promotion of partners participating in various marketing activities on Tourisme Québec's Web page	Promotion of partners participating in various marketing activities on Tourisme Québec's Web page

For the business section of the market, the campaign will focus on trade magazines, direct marketing, the tourist fulfillment centre and the Internet.

*PRESS RELATIONS*

*Canada*

- Contribute to the organization of four press meetings.
- Participate in the Media Marketplace organized by the Canadian Tourism Commission in Toronto.
- Organize press tours and individual trips focusing on well-defined targets.

*United States*

- Contribute to the organization of the annual meeting of the western sector of the Society of American Travel Writers (SATW) in Montréal (150 people), take charge of tours before and after the event.
- Organize the convention of the Eastern Ski Writers Association (100 people) in the Laurentians, and take charge of tours before and after the event.
- Take part with the CTC in press meetings held for performances by the Cirque du Soleil in New York, Chicago and Atlanta.
- Participate with Air Canada in press meetings in Chicago and Boston.
- Coordinate the activities requested from the Shandwick agency.
- Organize 12 filming sessions for the Public Broadcasting System (Rod and Reel, Cabin Country, Streamside), two broadcasts of North American Hunter.
- Welcome editors from the five largest hunting and fishing magazines.
- Participate in the convention of the Outdoor Writers Association of America and the Shot Show.

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*DISTRIBUTION*

*Canada*

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

*United States*

- The Tourisme Québec canvassing team is active in four cities and covers Québec's priority submarkets.
- An American Travel Agents Accreditation Program will be launched. Over the next two years, the objective is to train 750 travel agents as accredited specialists on Québec as a tourism destination for American consumers. The initiative is also designed to make the new network a promotional partner of Tourisme Québec.
- Vacation packages targeting the gay clientele in major cities will be developed in cooperation with four specialized tour operators.

- Visual of the promotional campaign on the american market

Summer & Fall Vacation Guide 1998

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*Closer than you think*

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- The great outdoors
- Plan for spectacular fall scenery
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HOTELS-CAN EXPRESS

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www.tourisme.gouv.qc.ca/summer.html

*Closer than you think*

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## FESTIVALS à la Montréal

Come summer, Montréal is the festival capital of the world, playing host to a nonstop calendar of internationally renowned festivals and other events. Top-dollar talent and literally free-for-all entertainment spill out into the streets... all dressed up with a stylish *savoir-faire* that makes the city irresistible.

**MAJOR FESTIVALS & EVENTS**

<b>Boston &amp; Hodge International Fireworks Competition</b> June 6 - July 19	<b>Festival International de Jazz de Montréal</b> July 1 - 12
<b>Just for Laughs Festival</b> July 15 - 18	<b>The World Film Festival</b> August 27 - September 7

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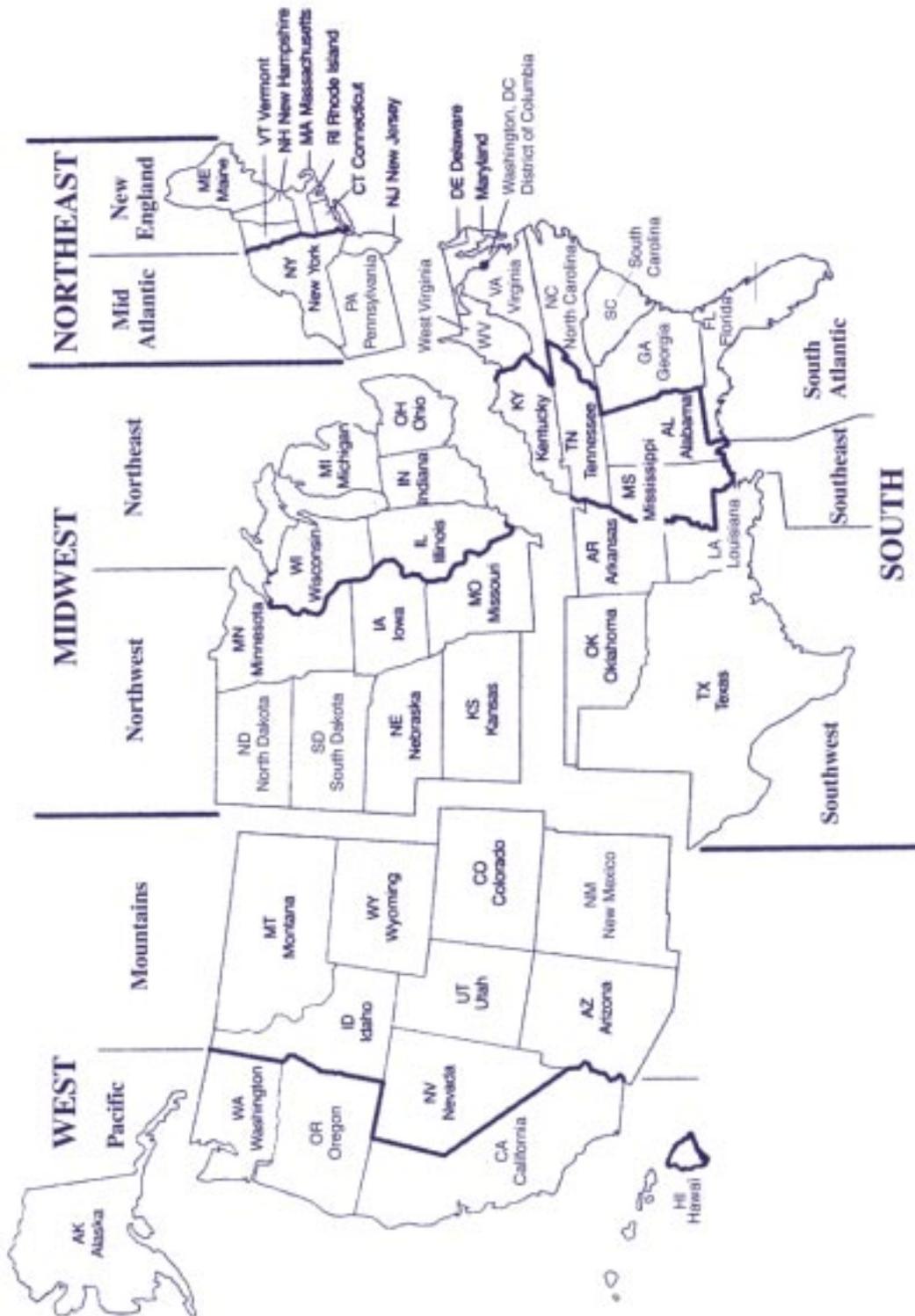
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■ Map of American geographic submarkets

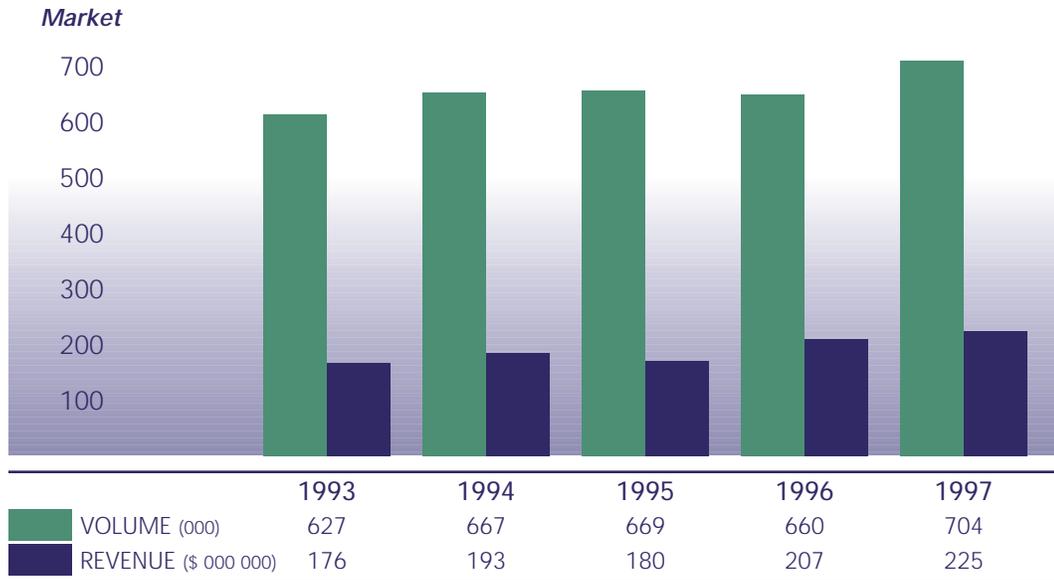


■ **Primary markets: in need of renewal**

Customers in these markets are 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)*



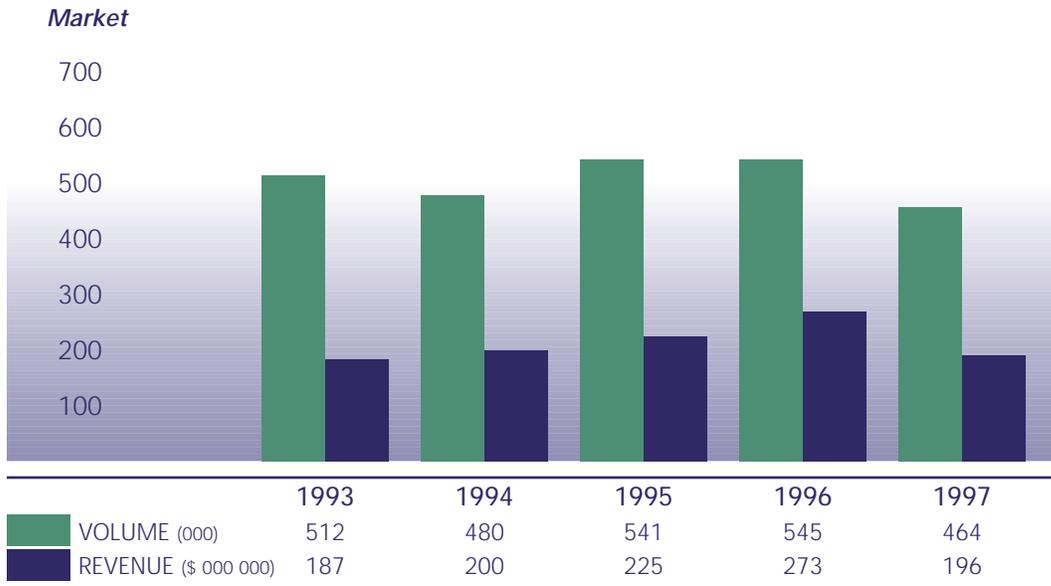
- The New England submarket has the highest propensity to visit Québec. It is the only region in the U.S. where more tourists visit Québec than Ontario. However, with a population of 13 million, it is the least populous region in the U.S.
- This traditional Québec market has performed well since 1992: 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.
- The results for 1997 for pleasure tourism were better than the general performance of this submarket. Volume rose 19%; revenue 12%. These are the best results of the decade for this submarket. However, business and convention tourism was down compared to 1996.
- The CTRI forecasts that the number of tourists to Québec from this region in 1998 will rise 2.9% and that their spending will increase by 3.3%.

■ **Priorities for action**

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

**ATLANTIC CENTRE**

(New York, Pennsylvania, New Jersey)



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- This submarket is more distant from Québec but is traditionally the largest in terms of tourism revenue. However, in 1997 preliminary results show a decided downturn compared to 1996, returning to 1994 levels. This situation also holds for pleasure tourism. On the positive side, business and convention tourism remained stable.
- Ontario is our biggest Canadian competitor on this submarket. In 1996, Ontario held 66% of this submarket compared to 19% for Québec.
- The CTRI forecasts that the number of tourists to Québec from this region will rise 1% in 1998, and that their spending will increase by 1.1%.

■ **Priorities for action**

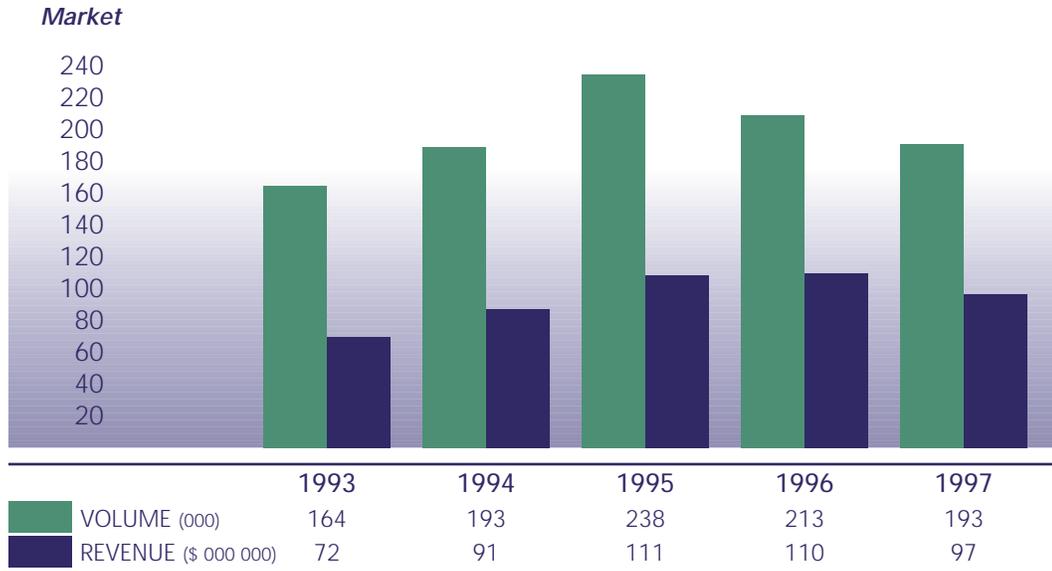
- Raise our visibility with the consumer.
- Continue canvassing activities with tour operators and ski clubs.
- Intensify our presence with seniors clubs.
- Intensify press relations activities.
- Begin promoting new products.
- Continue information and training initiatives with American travel agents.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

■ Secondary markets: lucrative opportunities

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

**ATLANTIC SOUTH**

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



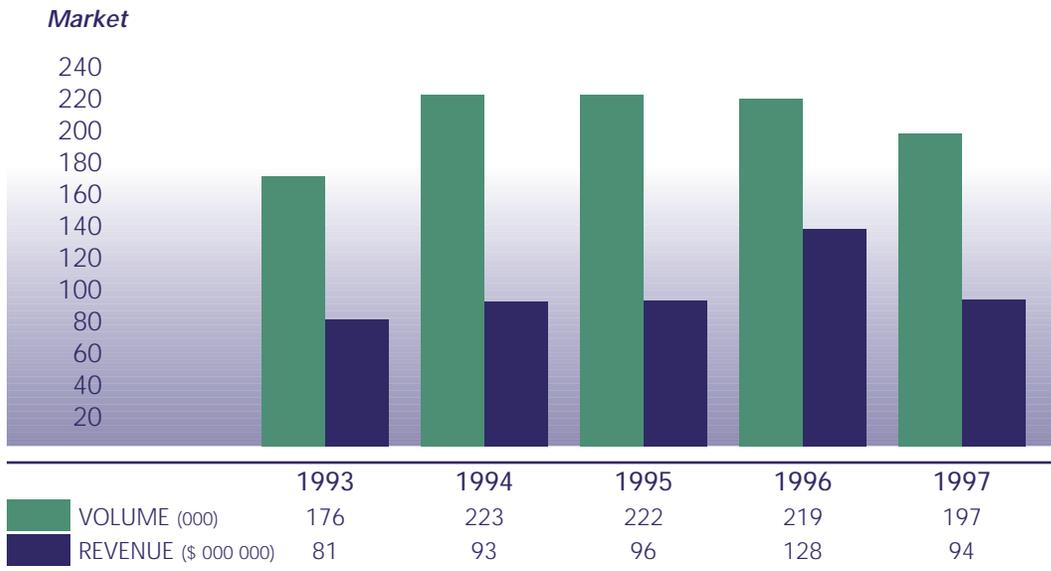
- Both the number of tourists and revenue were up strongly in this submarket from 1993 to 1995. However, growth has been negative since 1995.
- Pleasure tourism was less affected by the downturn in 1997 (volume down 6% and revenue off by 5%). Some of the gains made in 1995 and 1996 have been maintained. Business and convention tourism was hit harder by the decline.
- 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 CTRI forecasts that the number of tourists to Québec from this region will rise 2% in 1998, 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 representation activities.
- Increase telemarketing in the pleasure tourism and business tourism sectors.
- Intensify press relations activities.
- Consolidate joint promotion agreements with tour operators.
- Begin a process designed to inform travel agents and make them more aware of Québec as a tourist destination.

**CENTRE NORTHEAST**

(Wisconsin, Michigan, Illinois, Indiana, Ohio)



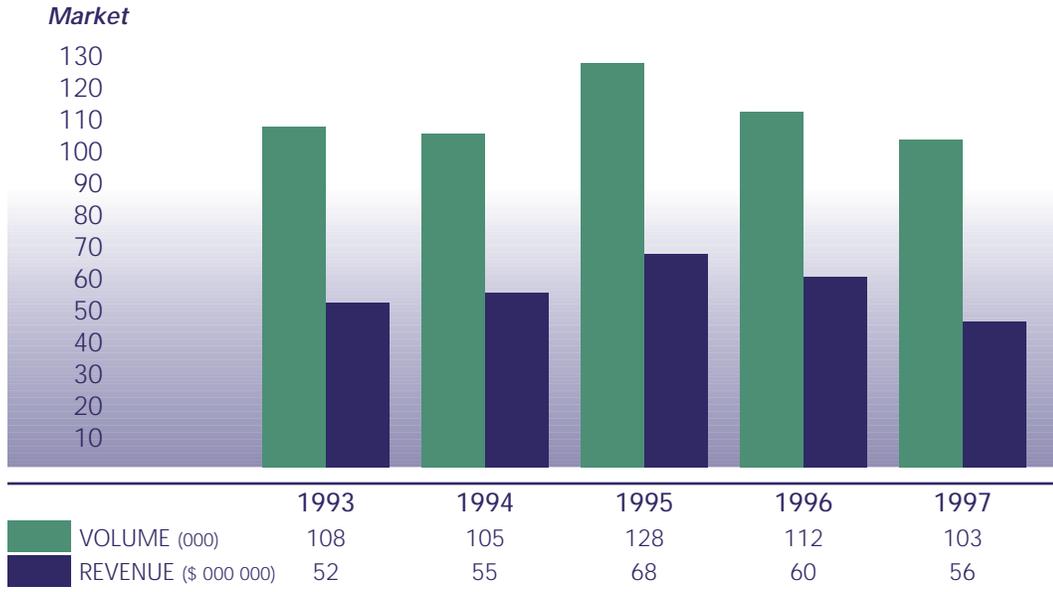
- This submarket is as big as the Atlantic South. Following a period of stability from 1994 to 1996, results were down in 1997, as they were in the Atlantic South. However, the downturn in 1997 seems to have particularly affected pleasure tourism (down 21% by volume and 49% by revenue) compared to business and convention tourism, where revenue was actually up. This downturn may in fact not be so significant because the performance in 1996 was so exceptional compared with previous years' results that questions may be raised regarding the validity of the statistical data.
- This region of the United States supplies the largest number of tourists to Canada: in 1996, Americans from the Centre Northeast made 3.5 million province-trips to Canada. Ontario holds 80% of this market but Québec only 6%.
- This region ranks second in the United States in terms of the number of headquarters of national and international associations. The incentive travel industry is also very active there.
- The CTRI forecasts that the number of tourists to Québec from this region will rise 1.9% in 1998, and that their spending will increase by 3.9%.

■ **Priorities for action**

- Our canvasser will carry out a range of representation activities to increase the level of recognition of Québec in the distribution network.
- Intensify press relations activities.
- Pleasure tourism: target automobile clubs, group influencers (ski, seniors).
- Mount a telemarketing campaign in the pleasure and business tourism sectors, and build a database for these sectors.

**PACIFIC**

(California, Oregon, Washington)



- There has been little change in this market over the last five years in terms of both volume and revenue. In 1997, pleasure tourism posted an appreciable gain. However, business and convention tourism was down.
- Québec's share of the Canadian market is 4%, behind Ontario (11%) and British Columbia (69%). In view of the problems Asian economies are experiencing, British Columbia will probably intensify its activities in California in 1998 to offset the expected drop in Asian markets.
- Compared to other Americans, people in this region have the highest propensity to travel outside the United States. They seek out novel and active tourism experiences.
- Air service to Montréal could be improved in 1998. A flight between San Francisco and Montréal is expected to be added.
- California has emerged from a difficult economic period and is recovering strongly.
- The CTRI forecasts that the number of tourists to Québec from this region will rise 2.9% in 1998, and that their spending will increase by 3.9%.

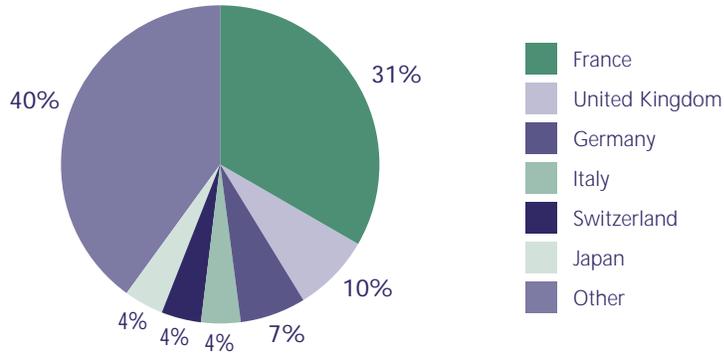
■ **Priorities for action**

- Continue to work with Canadian partners (CTC, 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.
- Develop direct marketing using three existing databases.
- Intensify press relations activities.
- Intensify representation activities with potential clients in the incentive travel and business meetings sector.
- Begin a process designed to inform travel agents and make them more aware of Québec as a tourist destination.

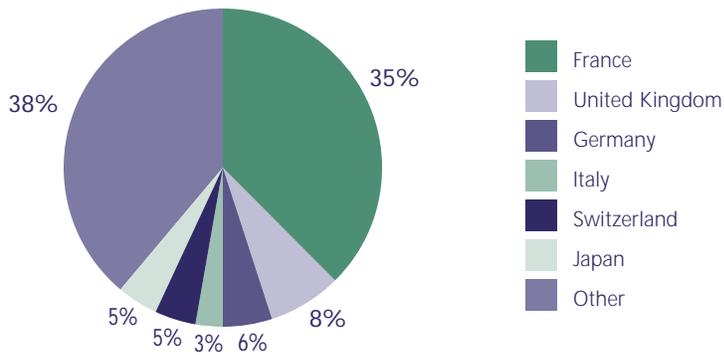
▶ OTHER PRIORITY INTERNATIONAL MARKETS

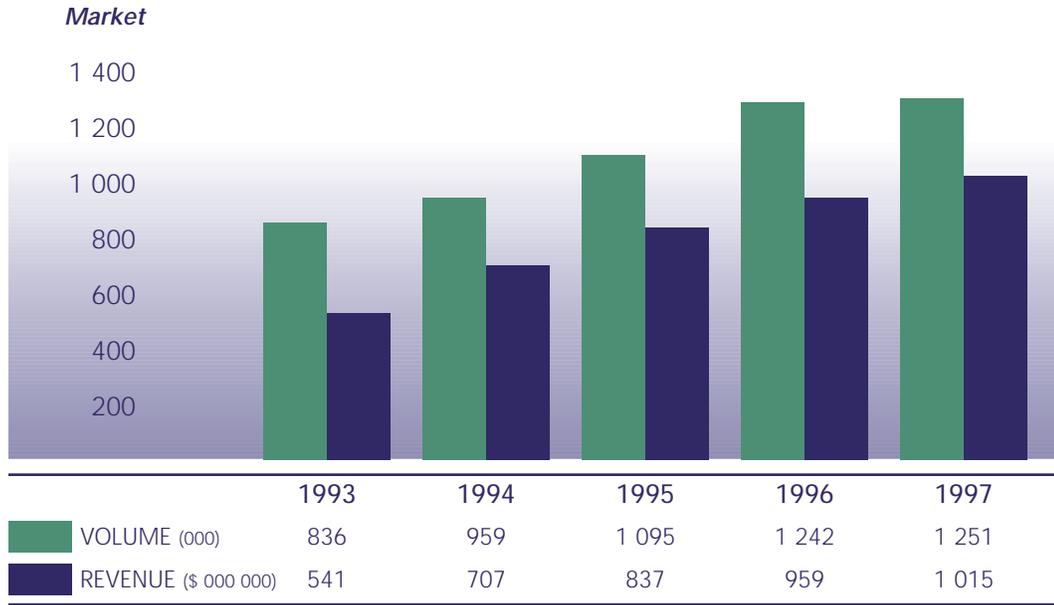
■ Internal breakdown of volume and revenue in 1997

*Distribution by country of the 1.25 million tourists in 1997*

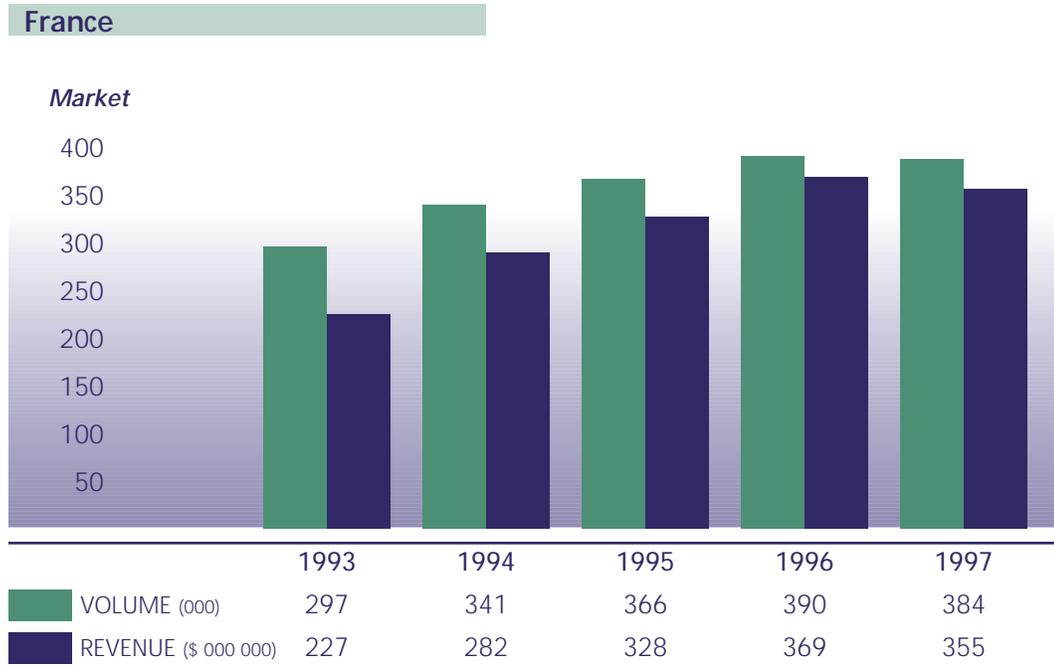


*Distribution by country of the \$1 billion in tourism revenue in 1997*





Since 1992, Québec's highest growth rates have been achieved in this market category. While growth slowed in 1997, such was not the case in business and convention tourism, which gained 16% by volume and 25% by revenue.



■ **The fastest-growing tourism market over the last ten years**

- The French market is Québec's largest European market. The number of visitors and revenue have risen steadily since 1990. In 1997, this market accounted for 31% of visitors and 35% of spending by international tourists other than Americans.
- In 1997 however, after twelve years of continuous growth, the number of French tourists visiting Québec declined (-1.5%). Revenue was also down (-3.8%).
- Québec continues to be the prime destination in Canada for French tourists: Québec's market share was 71% in 1995.
- French tourists are a lucrative market because, along with the Belgians and the Swiss, they spend the most time in Québec (10 bed-nights 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 Montréal and Québec City;
  - the growth in the French market is not confined to summer, but covers all seasons. This is the international client group most likely to visit Québec in winter.
- The CTRI forecasts that the number of French tourists visiting Québec in 1998 will rise 1.9% and their spending will increase by 3.2%.

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*Strengths and opportunities*

- Québec enjoys excellent visibility thanks to multi-promotional campaigns (posters, print, television infomercial campaigns, cinema campaign), undertaken in cooperation with the CTC and tour operators. These campaigns have produced very good results (30 000 qualified contacts through the infomercial) given the small investment required.
- Cooperation with air carriers is very good (Air Canada, Air Transat, Canada 3000).
- Québec is well represented in the winter and low season campaigns of tour operators. Québec is now part of the winter programming of thirty tour operators.
- The Adventure/Nature products play a growing role in the programs of tour operators.
- Demand for incentive tours is growing.
- The publicity value of articles in the French press on tourism in Québec set a record in 1997-1998 (\$32 million).
- The fact sheet, " Québec en bref" , faxed monthly, has helped raise demand among travel agents.
- Consumer satisfaction with information services available (Freephone, fulfillment centre, Minitel, Internet). The satisfaction rate among existing consumers is high.

- Québec offers attractions that are highly appreciated by French tourists: French-speaking environment, hospitality, change of scenery, wide open spaces, environmental awareness, modern North American conveniences. The French look for active vacations in a different setting, close to local populations.
- Québec is becoming increasingly well-known, so individual travellers, a category of tourists that spend more, are coming to the fore on the French market. Individual travel now accounts for almost two thirds of the market.
- Québec's quality/price ratio is still competitive.
- Long haul vacations are on the rise.
- The combination of two competing airlines, Nouvelles Frontières and Air Transat, will help maximize the number of seats available from certain cities other than Paris.
- More seats will be available in winter. It is also quite possible that the number of seats will rise in the summer of 1998 (Air Canada).
- It will become much easier to develop the Belgian market starting in May 1998, when Sabena begins direct service between Brussels and Montréal, adding to the charter flights offered by Air Transat and Canada 3000.

### *Challenges*

- Québec's image must be affirmed more forcefully in joint Canada/Québec advertising campaigns.
- A promotional concept to replace the Québec Express exhibition train is needed for consumers outside Paris.
- The visibility of Québec and Québec's tourism industry in the trade press could be improved.
- Individual travel is increasing, and these tourists make little use of professional travel services: about 70% of pleasure tourists purchase a no-frills flight.
- It is difficult to reach the individual travel market in the off-season.
- Tour operators tend to look to other destinations (Western Canada, United States, Caribbean). Western Canada and the United States are very evocative in the French imagination.
- Competition among tour operators for the group market tends to lower prices. Few operators invest significantly in marketing.
- New destinations, including some with substantial financial resources, are succeeding in attracting French consumers: Thailand, for the group market, South Africa, Australia, India, China, etc.
- The Belgian market is under-developed: Québec is not a significant part of Belgian tour operators' programming.
- Limited seat availability from Christmas to March.
- The economic situation in France hampers consumption of long haul travel.

■ Strategies and priorities for action

Objective: raise the level of recognition of Québec as a tourist destination and increase the sales volume of tour operators

*Positioning*

Summer and winter tourist experiences are emphasized. Nature and adventure are the showcase products.

*Target markets*

Chiefly regions outside Paris

*Target client groups*

Consumers with significant disposable income

Consumers who travel in the off-season

Incentive tours

Tour operators (producers and distributors)

*Theme*

**"Le Québec, c'est géant"** (Québec is HUGE!)

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**MARKETING STRATEGY**

*Advertising*

- Rebroadcast the two infomercials in the winter and summer with the same partners as in 1997-1998, namely the CTC, Air Canada and Tourism Ontario.
- Operation "spécial Canada" in the newspaper *Le Monde*, with the CTC.
- Formulate a communication strategy and creative concepts.
- Print campaign in the tourism industry media.
- Mass distribution print campaign with *Nouvelles Frontières* and *Vacances Air Transat*.
- Direct marketing campaign targeting consumers.
- Direct marketing campaign targeting tourism professionals (monthly fax to 5 000 professional contacts).
- Enhanced presence and better quality at consumer shows.

*Press relations*

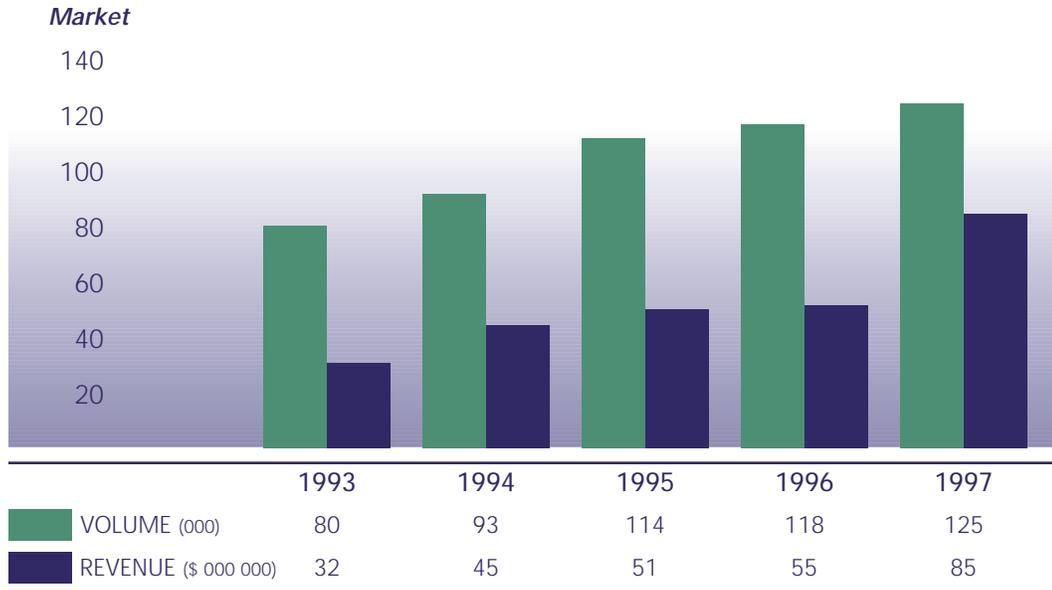
- Group and individual press tours emphasizing regions with lower visibility, emerging products (soft adventure, winter, snowmobiling, aboriginal tourism), and the off-season.
- Host 60 to 80 journalists as part of explorer Nicolas Vanier's "La tournée du Canada" dogsled expedition.

*Distribution*

- Support commercial opportunities arising from the distribution network.
- Personalized visits to the largest tour operators and incentive travel agencies.

## The United Kingdom

### ■ A growing market



- The British market grew substantially from 1993 to 1997. The number of British tourists visiting Québec rose 53% and revenue jumped 165%. In 1997, business and convention tourism was particularly strong: it is estimated that volume will rise 45% and revenue will more than double.
- However, with less than 10% of British tourist spending in Canada (1996), Québec is far from exploiting the full potential of this market.

#### *Strengths and opportunities*

- More tour operators are interested in Québec. The products offered are more varied (city tourism, winter products, skiing). These factors have helped increase sales of 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 level of recognition in the British tourism press is rising. The publicity value of articles on Québec reached \$8 million in 1997-1998.
- The partnership with the CTC and other provinces (Ontario, Nova Scotia), for television and print media advertising campaigns has proven very effective.
- Québec operators are 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 is claiming a growing share of the market in the United Kingdom.
- Since the summer of 1997, Air Canada has increased its service to Montréal. Tour operators welcomed the transfer of international flights from Mirabel to Dorval.
- Individual travel should increase at the expense of organized tours, since Québec is increasingly well-known as a tourist destination.
- 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 arrival of Mont Tremblant on the scene, tour operators are showing greater interest for the adult skier segment, since the student skier market for Mont Tremblant and Mont Sainte-Anne are already well developed. The youth segment offers other attractive prospects (holiday camps).
- The CTRI forecasts that the number of British tourists visiting Québec in 1998 will rise by 2.3% and their spending will increase by 8.5%.

### *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: Montréal, Québec City, the French character, fine cuisine, accessibility, safety, the quality/price ratio, wilderness and sophisticated cities nearby

### *Target markets*

Consumers who have visited Canada previously and prefer individual travel

Families seeking a mid-range product

Young people seeking an active vacation

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 advertising campaign using various national print media.
- Joint campaign with the CTC, Ontario, Air Canada and the Atlantic provinces (TV and national press).
- Advertising campaign targeting industry professionals through specialized media such as: TTG, Selling Long Haul, Travel Weekly and Globespan.
- Consumer-oriented promotion: 16-page booklet / Essentially-Québec.
- Joint promotions with wholesalers.

*Press relations*

- Press tours featuring Maritime Québec, parks and gardens, Montréal's festivals, fine cuisine.
- Organize a joint tour, with the CTC and Alberta.
- Individual tours focusing mainly on winter and incentive travel.

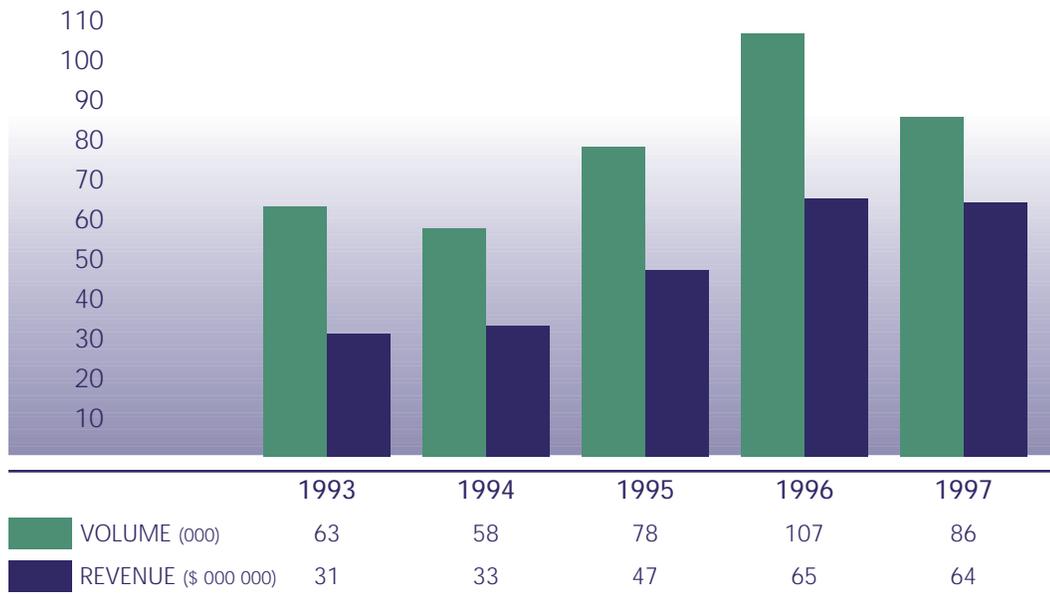
*Canvassing*

- Increase the distribution network's knowledge of the destination, in partnership with the CTC and Ontario.

**Germany**

■ Impressive growth

*Market*



- Although volume was down in 1997, after two years of strong growth, there has been an upward trend in this market since 1994. In particular, the downturn in 1997 affected tourism revenue only marginally.
- With less than 10% of German tourist revenue in Canada, Québec is far from having exploited the full potential of this market.
- The CTRI forecasts that the number of German tourists visiting Québec in 1998 will rise by 3% and that their spending will increase by 6.7%.

### *Strengths and opportunities*

- The recent advertising campaign targeting consumers (in cooperation with Air Canada, the OCTGM and ADM), the television campaign with the CTC, Ontario and the Atlantic provinces, as well as promotional activities in recent years have helped raise Québec's profile.
- An active tourist canvasser in Düsseldorf; along with Nova Scotia, Québec is the only province directly represented in Germany, adding to its credibility as a destination.
- The resumption in May 1998 of direct flights between Montréal and Frankfurt will increase air capacity. This is an attractive opportunity for Québec's tourism industry, notably because of the investment in promotion by Air Canada.
- The supply of packages to Québec by tour operators is rising as a result of sustained efforts in recent years in terms of canvassing and public relations.
- Québec stands 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 growing interest in Eastern Canada.
- Québec is represented by one of the best German press relations agencies, Wilde & Partner. The agency has won the award for best press relations agency in the tourism field five times. The publicity value of articles on Québec in the German travel press amounted to \$23 million in 1997-1998, more than double last year's figure.

### *Challenges*

- The presence of Québec's tourism industry in this market leaves something to be desired.
- Canada and Québec are frequently perceived as cold destinations.
- Germans fear they will not be understood if they speak English in Québec. They see 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 30% in 1997. This should favour package tours sold by 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

*Positioning*

Positioning is based on the following themes: adventure, nature and outdoor activities, city tourism

*Target markets*

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*

- The consumer campaign promotes summer in Québec, in national dailies as well as in weekly and monthly magazines. The goal is to make consumers aware of the destination and the many packages offered by tour operators. At the same time, an advertising campaign for the industry will be mounted.
- Televised infomercial campaign with the CTC, Ontario, the Atlantic provinces and Air Canada.

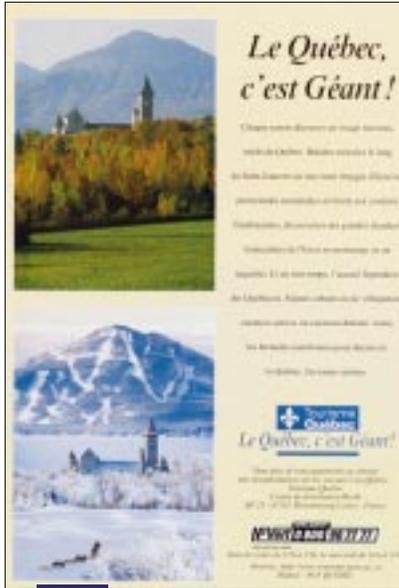
*Press relations*

- Together with Air Canada and Montréal's airports, organize two press tours to promote the inaugural Frankfurt-Montréal flight.
- Organize two filming sessions for German television, in particular the national ARD network.

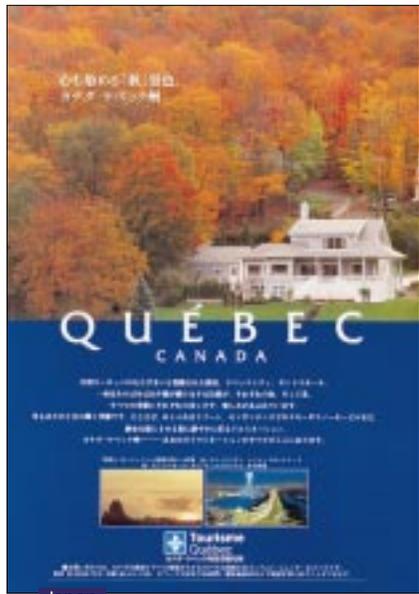
*Canvassing*

- Continue efforts with tour operators to benefit from the new direct flight between Frankfurt and Montréal.
- Educate travel agents regarding the destination.
- More active canvassing of the incentive travel market segment.

■ Visuals of promotional campaigns on European markets



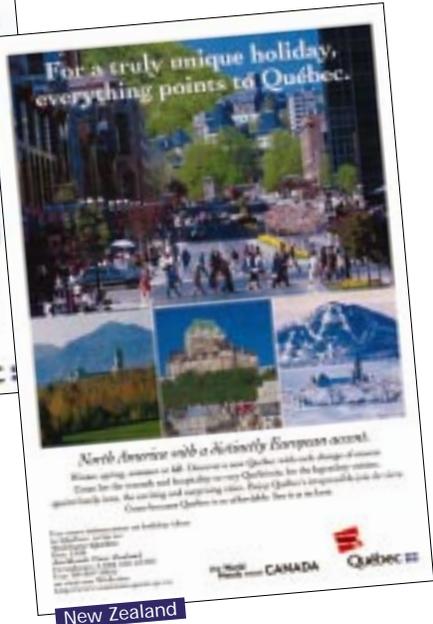
France



Japan



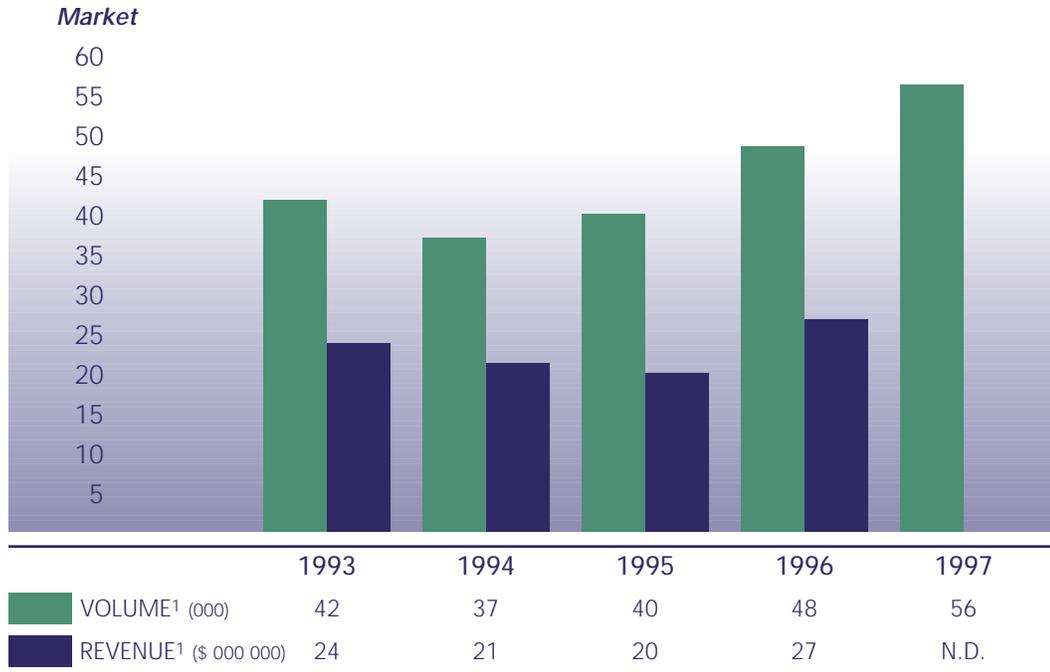
Brazil



New Zealand

## Italy

### ■ A growing market



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

- In recent years, there has been steady growth in the number of Italian visitors to Québec.
- Québec holds a substantial share of the Canadian market regarding Italian tourists (30% in 1995). This share probably rose in 1997 since the number of Italian tourists entering Canada via Québec was up 17% while the total number of Italian tourists in Canada fell 7%.

#### *Strengths and opportunities*

- Italians have a good knowledge of Canadian destinations, particularly Montréal, Toronto and Vancouver (large Italian community in Québec).
- Interest for the winter product and incentive travel.
- The number of seats reserved by Canadian and Québec motor coach operators for Italian groups will double in 1998.

#### *Challenges*

- Italians travel a great deal within their own country.
- Air service to Montréal is not satisfactory.

■ Strategies and priorities for action

Objective: To increase sales

*Positioning*

Summer and winter are promoted with particular emphasis on tours.

*Target markets*

Chiefly northern Italy.

*Target client groups*

High income consumers  
 Tour operators and travel agents  
 Incentive travel organizers

*Theme*

• ***“Découvrez la destination idéale pour vos prochaines vacances”***  
 • *(Discover the ideal destination for your next vacation)*  
 •

**MARKETING STRATEGY**

*Advertising*

• Tourisme Québec will join in the advertising campaigns of the Canadian Tourism Commission and the airlines.  
 •

*Press relations*

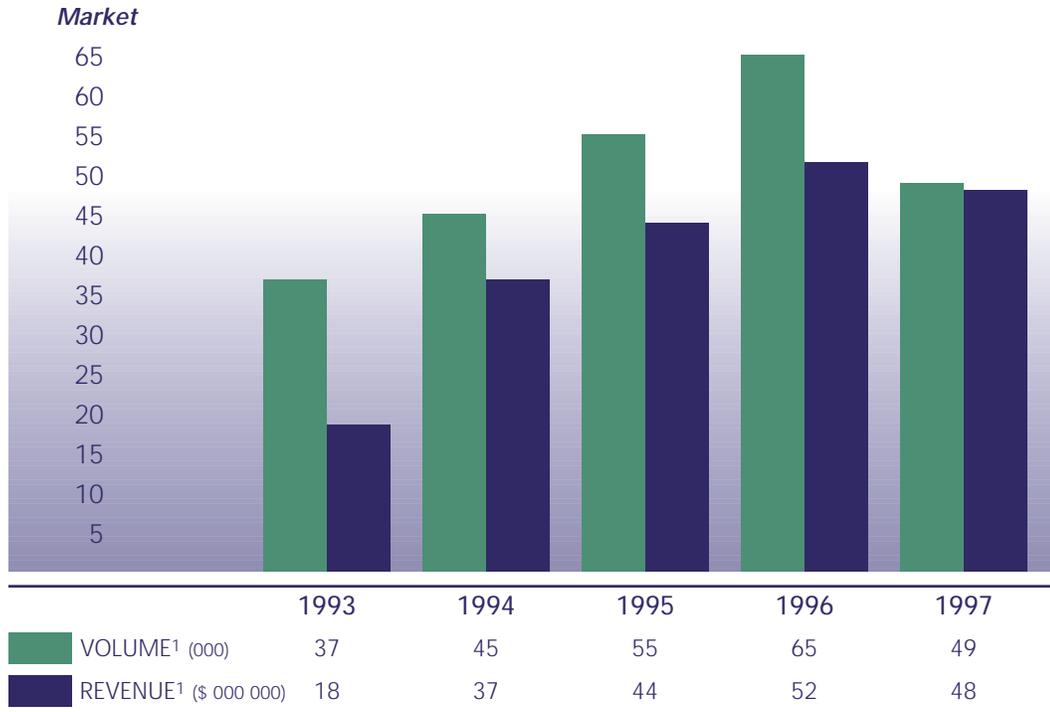
- Along with the CTC, contribute to hosting a large number of journalists of the Italian national press in Québec for the Festival du canard du lac Brome.
- Organize more specialized tours.

*Distribution*

- Provide financial support for tour operators to encourage them to add more Québec tourist products to their programs, especially in winter, particularly for the incentive travel market.
- Hold promotional activities to encourage the development of winter tourism.

## Japan

### ■ A lucrative market



<sup>1</sup> The number of province-trips attributable to Japanese travelers in Québec has varied widely over the last ten years because of methodological problems relating to sample sizes. Accordingly, the data from the International Travel Survey (Statistics Canada) are indicative only and should be used with caution.

- Over the last ten years, the Japanese tourist market has grown vigorously: between 1984 and 1995, the number of overseas trips made by Japanese travelers rose from 5 million to 15 million. With tourist expenditures of some US\$30.7 billion for overseas travel, Japan ranks third behind the United States (\$43 billion) and Germany (\$41.7 billion) in spending abroad by nationals.
- The length of stay in Canada is relatively short (5.9 bed-nights as against 11.3 for Europe) but spending per bed-night is twice as high as for European travelers.
- Québec holds only 7% of the Canadian market, compared to 24% for Ontario.
- After three years of growth, Japanese tourism in Québec declined in 1997. It is worth noting that the number of Japanese tourists in Canada fell 14% in 1997, mainly because of problems with the Japanese economy which caused the yen to lose value.
- The CTRI forecasts that the number of Japanese tourists visiting Québec in 1998 will rise 5.3% and that their spending will increase by 0.7%.

### *Strengths and opportunities*

- Québec has had a canvasser on the Japanese market since 1982.
- Japanese tourism has reached a degree of saturation 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 increasingly want 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 are 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 Nagano Winter Olympics introduced the Japanese to many winter activities. Québec's winter tourism product could well meet Japanese expectations.
- The market is changing: 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.
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- The Japanese market is maturing. 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.
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- 
- Airline deregulation in the United States and Japan will lead 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 improve access to major airports and facilitate 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) will have a positive impact on Québec, which now has a canvasser in the region. This situation is seen in a very positive light in the region.
- The yen has fallen in value relative to the Canadian dollar, which should help obtain better value in terms of marketing investments.

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### *Challenges*

- The lack of a direct flight to Montréal hampers efforts to market Québec as a destination.
- Japanese tourists are 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 25-54 year-olds.

*Theme*

***“The passion of discovery”***

**MARKETING STRATEGY**

*Advertising*

An advertising campaign with Québec and Canadian partners (Montréal and Québec City tourist bureaus, Via Rail, Air Canada) will be launched in cinemas in the Tokyo-Osaka-Nagoya region. There will also be a 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 tours, in particular with the CTC.

*Distribution*

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

## ► 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 wait to begin positioning itself on these markets.

### Latin America

(Mexico, Central America, South America)

The number of tourists in Canada from Latin America jumped 51% from 1993 to 1996, rising from 224 000 to 339 000 province-trips. The increase was even more spectacular (73%) for South America, with 189 000 province-trips. Three quarters of tourists from South America visit Eastern Canada, and Québec channels 35% of these into Canada. This market share rose five points from 1993 to 1996, while in Ontario it fell six points. Two national markets dominate this huge continental market: Mexico and Brazil.

- **Mexico** experienced a financial and economic crisis in 1994-1995, which resulted in high inflation, a devaluation of the peso and a 7% drop in GDP. The crisis caused a sharp decline in 1995 in the number of Mexicans visiting Canada. The economic situation picked up in 1996 and the flow of tourists immediately returned to its 1994 level. The trend seems to be continuing in 1997 with the number of Mexicans entering Canada via Québec up 30% compared to 1996. For Canada as a whole, the number of Mexican tourists rose 17%.
- **Brazil's** tourist market grew strongly from 1994 to 1996, with the number of Brazilians visiting Canada almost doubling. In 1997, however, the increase was only 2%.

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#### *Strengths and opportunities*

- Canada, including Québec, is viewed as a safe exotic destination (winter), and enjoys a very positive image.
- Air fares 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.
- 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

- Take part in marketplaces and fairs in these markets.
- Make the distribution networks aware of Québec tourist products with the potential of interesting customers in these markets.
- 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.

### Pacific Rim Countries

With the exclusion of Japan, the number of tourists 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.

### ■ Taiwan: the best short-term growth potential

Trips abroad by Taiwanese grew 600% between 1985 and 1995. In Canada, the number of Taiwanese tourists rose 34% from 1995 to 1996, though by only 3% from 1996 to 1997. These tourists make lengthy visits and spend freely.

### *Strengths and opportunities*

- Taiwanese tour operators are showing increasing interest in Québec and its cultural difference. Recent familiarization tours with tour operators have resulted in their offering new fall/winter packages in Ontario and Québec.
- Tourisme Québec now has a promotional document in Mandarin, produced jointly with the CTC, Ontario and Canadian Airlines International.
- Western Canada is increasingly saturated as a destination, prompting Canadian Airlines to seek a point of entry in the East.
- Among the Asian countries currently affected by the economic and financial crisis, Taiwan should recover first.
- The incentive travel segment shows growing potential, as does the individual travel segment.

### *Challenges*

- Canada and Québec are perceived as cold and expensive destinations.
- Canada requires Taiwanese tourists to obtain a visa. In addition, the federal government raised the price of the visa by 80% in 1996, while Australia and the United States are considering removing this requirement.
- Québec is distant from this market and British Columbia remains the chief point of entry for Taiwanese tourists to Canada.
- Seat capacity is limited in high season. The monopoly over this market held by Canadian Airlines hampers the development of the Eastern Canadian market (Québec and Ontario).
- Québec's tourism industry is unfamiliar with Taiwanese culture and the requirements of Taiwanese tourists.

### ■ South Korea: high potential despite the more difficult context

The number of Korean tourists to Canada rose threefold from 1990 to 1995. However, in 1997 it fell 8%, probably as a result of the country's economic problems. It is encouraging to note that the number of Korean tourists who entered Canada via Québec rose 8% in 1997 compared to 1996.

### *Strengths and opportunities*

- In 1994, Canada made access for Koreans easier by removing the requirement that they obtain a visa and by improving air service to Vancouver and Toronto.
- The main Korean agencies active in Canada are based in Toronto and offer more and more Québec tourist products.

### *Challenges*

- Korean tour operators seek the lowest possible price, which can jeopardize the quality of the tourism product.
- The Korean economy is experiencing a deep recession which should adversely affect the number of Korean tourists to Québec and Canada. The OMT forecasts that tourism traffic from Asian countries will fall over the next three years.

### ■ Hong Kong: gateway to China

The number of tourists from Hong Kong to Canada fell 27% in 1997, compared to 1996, likely as a result of political changes in Hong Kong. The decline was not as severe in Québec (11%). It is expected that this market will shrink again in 1998.

### *Strengths and opportunities*

- A population that is well-off economically and sophisticated, that travels extensively abroad and increasingly appreciates Canada.
- Improved air service with Canada.
- 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.

*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 and information seminars.
- 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.
- Carry out joint activities with Tourism Ontario.
- Develop closer business relations with Asian tour operators established in Toronto and Vancouver.
- Translate Québec *Trip Talk*, designed for the distribution network, into the languages of the target markets.
- Update the database on new Asian markets for the Québec tourism industry.
- Australia/New Zealand:
  - Increase the number of tour operators participating in *Rendez-vous Canada* and the *Québec-Ontario Marketplace*
  - Maintain a Québec presence on *Corroborees* and *Canada Calls*

## ► MULTI-MARKET PROMOTIONAL ACTIVITIES

### Promotional Tools and Publications

In order to position Québec as a destination, Tourisme Québec produces tourist brochures, support material for promotional activities and promotional tools for the distribution network. The publishing program for 1998-1999 can be found in Appendix 2.

Two documents will be published based on an entirely new concept in 1998-1999: Vacationing in Québec and Accommodations in Québec.

New items this year include:

- The *Destination excellence* booklet promoting the winners of the Grands Prix du tourisme québécois, for the Québec market;
- the *Ski de fond* leaflet;
- a leaflet on aboriginal tourism;
- two promotional documents, *Circuits escapades touristiques* and *Circuits thématiques*;
- a new video on snowmobiling.

New promotional articles for consumers and the business market will continue to be commercialized.

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### Tourist Information

Tourisme Québec answers 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 1998-1999, the priorities for action are:

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

## 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

- Produce, distribute and promote (in print and on the Internet) nine getaway tours around Montréal and Québec City.
- Produce, distribute and promote two alternative routes between Montréal and Québec City: the *Route du Sud* (southern route), Montérégie, Eastern Townships, Chaudières-Appalaches, and the *Route du Nord* (northern route), Laurentians, Lanaudière, Mauricie-Bois-Francis.
- Produce, distribute and promote an initial series of three theme routes: parks and gardens, religious tourism and farm tourism.
- Manage the tourism events program.
- Incorporate new products into Tourisme Québec's advertising campaigns.
- Renew the direct marketing campaign with CAA-Québec and Kilomètres Voyage (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*.
- Carry out and assess the ACTA Vacances Québec pilot project: production of two sales manuals, training and upgrading sessions, familiarization tours.
- Maintain financial support for those that are receptive to familiarization tours.
- Increase promotion of international cruises on the St. Lawrence.
- Review the partnership with the Association des propriétaires d'autobus du Québec (APAQ - bus owners association) for the production of *Bienvenue Québec*: joint telemarketing among buyers to create an up-to-date database, assessment of their appreciation of the marketplace and invitation to the next edition.
- Coordinate activities for the creation of the Grand Nord RTA and ensure that the action plans developed meet the objectives of Tourisme Québec.

■ **Conventions, business meetings and incentive travel**

- Develop a new stand concept to highlight Montréal and Québec City as destinations while maintaining a 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 on the American market and intensify promotion of the winter experience among a more diversified client group.
- Intensify the partnership with SkiCan.
- Strengthen promotion of skiing on secondary markets in the United States and overseas.
- Support the request for the creation of a cross-country ski product club with the CTC and develop an appropriate marketing plan for the product.

■ **Resort tourism**

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

■ **Snowmobiling**

- Continue the Québec – Ontario – New Brunswick joint campaign with the CTC and improve promotion of this product in Tourisme Québec campaigns.
- Complete production and launch the new snowmobiling video at the world and provincial conventions.
- 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.

■ **Adventure**

- Improve the marketing approach for this product by integrating it more effectively in 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 leaflet 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 the adventure product in the United States and Europe.

■ **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. .
- Add a leisure fishing product to current packages offered by tour operators to promote the product and increase its visibility and distribution. .

## OPPORTUNITIES

### FOR THE INDUSTRY

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

#### ► SHOWS, MARKETPLACES AND FAIRS

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

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

- **JB** M. Jean Bouffard, of the Direction du développement des marchés at (514) 873-7977;
- **HF** Mme Hélène Fortier of the Direction du développement des marchés at (514) 873-7977;
- **MG** M. Michel Gagné of the Direction du développement des marchés at (514) 873-7977;
- **RP** M. Raynald Paquet of the Direction du développement des marchés at (514) 873-7977;
- **LBP** M. Louis B. Parent of the Direction du développement des marchés at (418) 643-9131;
- **SW** Mme Suzanne Watson of the Direction du développement des marchés at (514) 873-7977.
- **ML** M. Michel Leblanc of the Direction du développement des marchés at (514) 873-7977.

Here is the list of shows, marketplaces and fairs for 1998-1999.

## ► MEXICAN, SOUTH AMERICAN AND OVERSEAS MARKETS

Country	Activity	Date	City	Client group	Resp.*
Germany	Sellers' mission	September 1998	Frankfurt	Trade	MG
	International Travel Bourse (ITB)	March 1999	Berlin	Trade	MG
Australia	6 Corroborees	January 1999	Perth Adelaide Melbourne Sydney (2) Burbank	Trade	MG
Brazil	ABAV - Brazilian fair for travel agents	October 1998	n.a.	Trade	MG
	BRAZTOA - Brazilian Tour Operator Association	March 1999	Sao Paolo	Trade	MG
Canada	Ontario/Québec Marketplace	September 1998	Percé	Trade	MG
	Rendez-vous Canada	May 1998	Québec City	Trade	MG
Spain	Feria Internacional de Turismo (FITUR)	January 1999	Madrid	Trade	MG
France	Partir en hiver (winter vacations)	October 1998	Paris	Consumers	MG
	Atelier Québec	November 1998	Paris	Trade	MG
	Motivation Québec	November 1998	Paris	Trade	MG
	3 consumer shows: - Mahana - SMT - Rando Expo	March 1999	Lyon Paris Paris	Consumers	SW SW LBP
Italy	Borsa Internazionale del Turismo (BIT)	February 1999	Milan	Trade	RP
Japan	Kanata 1998	October 1998	n.a.	Trade	MG
	DMO Mission	February 1998	n.a.		
Mexico	Conozca Québec/Canada	April 1999	Mexico City	Trade	MG
United Kingdom	Ski Shows	October 1998	Birmingham London	Consumers	HF
	World Travel Market	November 1998	London	Trade	MG
	U.K. Spotlight Canada	March 1999	London	MC & IT	MG

\* Person responsible

New Zealand	Canada Calls (3)	January 1999	Christchurch Auckland Wellington	Trade	MG
Southeast Asia	Showcase Canada	October 1998 (after Kanata)	Industry Hong Kong Taiwan South Korea	MG	
Switzerland	European Incentive & Business & Travel Meetings Exhibition (EIBTM)	May 1999	Geneva	MC & IT	RP

► **NORTH AMERICAN MARKET**

**CANADA**

Region	Activity	Date	City	Client group	Resp.*
Ontario	The Travel And Leisure Show	April 1998	Toronto, ON	Consumers	MG
	Ski Group	May 1998	Toronto, ON	Trade	HF
	Canadian Society of Association Executives (CSAE)	July 1998	London, ON	MC & IT	RP
	Meeting/Incentive Canadian Trade Show	August 1998	Toronto, ON	MC & IT	RP
	Toronto Ski Show	October 1998	Toronto, ON	Consumers	HF
	Snowmobile Show	October 1998	Markham, ON	Consumers	LBP
	Ontario Motor Coach Association (OMCA)	November 1998	Toronto, ON	Trade	MG
	Québec Day	February 1999	Toronto, ON	MC & IT	RP
	Meeting Planners International	January 1999	Vancouver	MC & IT	RP
Québec	Hunting and fishing show	March 1999	Toronto, ON	Consumers	ML
	Bienvenue Québec	October 1998	Montréal	Trade	SW

\* Person responsible

**UNITED STATES**

Region	Activity	Date	City	Client group	Resp.*
All regions	Hunting and fishing shows	January-March 1999	15 cities (see the list in the Operating Plan)	Consumers	ML
	Travel agents accreditation program	1998-99	10 cities (see the list in the Operations Plan)	Trade	JB
Territory of the New York office	SkiGroup'98	April 1998	Washington, DC Philadelphia, PA Secaucus, NJ New York, NY Pittsburgh, PA	Consumers	HF
	Spotlight Canada	April 1998	Upstate New York	Trade	MG
	National Ski Show	October 1998 November 1998 November 1998	Philadelphia, PA Long Island, NY Washington, DC	Consumers	HF
	Showcase Canada	May 1998 November 1998	Pittsburgh, PA New York, NY	MC & IT	RP
	United States Tour Operator Association (USTOA) Annual Meeting	December 1998	San Juan, Puerto Rico	Trade	JB
	Cirque du Soleil	April 1998	New York, NY	MC & IT	RP
	Cirque du Soleil	April 1998	New York, NY	Trade (travel agents)	MG
	Affordable Meetings	September 1999	Washington, DC	MC & IT	RP
	Québec Marketplace	April 1998	New York, NY	Trade	MG
Territory of the Chicago office	Chicago Tribune Show	1998-99	Chicago, IL	Consumers	MG
	National Tour Association (NTA)	December 1998	St. Louis, MO	Trade	JB
	American Bus Association (ABA)	November 1998	Milwaukee, WI	Trade	JB
	Detroit News Show	1998-99	Detroit, MI	Consumers	MG

\* Person responsible

	Ski shows	1998-99	Detroit, MI Chicago, IL Cleveland, OH	Consumers	HF
	International Adventure Travel Show	February 1999	Rosemont	Consumers	LBP
	American Society of Association Executives (ASAE)	July 1998	Nashville, TN	MC & IT	RP
	IT & ME (Motivation Show)	July 1998	Chicago, IL	MC & IT	RP
	Showcase Canada	1998-1999	Chicago, IL St. Louis, MO Kansas City, MO Detroit, MI	MC & IT	RP
	Spotlight Canada	1998-99	Chicago, IL Minneapolis, MN Cleveland, OH Detroit, MI	Trade	MG
	Québec Day	September 1998	Minneapolis, MN	MC & IT	RP
	Québec Day/ Cirque du Soleil	July 1998	Chicago, IL	MC & IT	RP
Territory of the Los Angeles office	Showcase Canada	September 1998	San Francisco, CA Seattle, WA	MC & IT	RP
	Insurance Company Planners Association (ICPA)	December 1998	Palm Springs, CA	MC & IT	RP
	MPI WEC Conference	December 1998	San Diego, CA	MC & IT	RP
	Spotlight Canada	January 1999	n.d., CA	Trade	MG
	Swing Thru Canada	June 1998	Los Angeles, CA	Trade	MG

New England	Québec Day	1998-99	Boston, MA	MC & IT	RP
	Showcase CTC	November 1998	Boston, MA	MC & IT	RP
	Boston Sports Show Expo (ski)	November 1998	Boston, MA	Consumers	HF
Territory of the Dallas office	Adventure/Outdoors Show	1998-99	Atlanta, GA	Consumers	LBP
	Showcase Canada	1998-99	Atlanta, GA Dallas, TX	MC & IT	RP
	Ski Group Shows	1998-99	Houston, TX Dallas, TX Atlanta, GA n.d., FL	Consumers	HF
	Ski shows	1998-99	Fort Lauderdale, FL	Consumers	HF
	Québec Travel Industry	September 1998 and April 1999	Dallas, TX Atlanta, GA	Trade	MG
	Québec Day/ Cirque du Soleil	May 1998	Atlanta, GA	MC & IT	RP
	Cirque du Soleil	October 1998	Atlanta, GA	MC & IT	RP
	American Airlines Fly Away Vacations	November 1997 (the 19th)	Dallas, TX	Trade	MG
	Meeting Planners International (MPI)	January 1998 (the 11th)	Orlando, FL	MC & IT	RP
	Spotlight Canada	March 1999	n.d.	Trade	MG
Adventure Travel	February 1999	Dallas, TX	Consumers	LBP	

## ► 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, sectoral and regional associations, etc.);
- the distribution network on foreign markets (wholesalers, air carriers, agencies, etc.)

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

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

## ► FINANCIAL SUPPORT FOR REGIONAL 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. In 1998-1999, special financial assistance will be granted to the three sub-regions in the Grand Nord RTA.

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

## ► SUPPORT FOR REGIONAL TOURISM

Under Bill 76 which instituted the Fonds de partenariat touristique (tourism partnership fund), Tourisme Québec returns the regional proceeds of the specific tax on lodging to those regions which have requested collection of the tax.

For more information on activities resulting from this financial support, contact your regional tourism association.

## ► 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 the cities where Québec has canvassers, and 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 Scandinavia
Düsseldorf	Germany Austria Switzerland
Tokyo	Japan
Toronto	Canada Korea Taiwan Hong Kong
Montréal	Canada (Maritimes) United States (New England) Italy Spain Mexico and Brazil Australia and New Zealand

Contact information for the canvassers is given in Appendix 3.

For more information in this regard, contact:

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

## ► TECHNICAL SUPPORT AND ADVICE

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

- marketing tourist products;

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

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

- awareness of products and markets.

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

## ► 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) 873-7977.

### ■ The *Agrément (Summer-Fall and Winter)* campaign on the North American Market

For each of these means of communication we have developed options to enable partners to participate, in return for a financial contribution, in Tourisme Québec's promotional efforts. Prices have been set to reduce costs for Québec partners.

■ 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) 873-7977.

■ The *Business* campaign on the North American market

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

▶ **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.

▶ **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 *Jacinte Dumoulin* of the Direction de l'accueil et des renseignements touristiques at (514) 873-5268.

- presentation of short activities;
- rental of display cases (limited space);
- wall space for posters (Infotouriste centres of Montréal and Québec).

For more information on this subject, contact, for Montréal, *Ion Valcéanu* of the Direction de l'accueil et des renseignements touristiques (514-873-7945) or, for Québec City, *Lucie Loignon* of the Direction de l'accueil et des renseignements touristiques (418-643-2280).

## BUDGET

## BY MARKETS

(\$'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			
<b>Positioning and marketing of Québec</b>													
Advertising	1 200	500	4 998	265	320	330		100	7	7	3		7 730
Publishing	180	102	431	115	58	58		58					1 000
Press relations	70	50	265	135	85	220	50	40	5	20	5	90	1 035
Canvassing		100										2 400	2 500
Marketplaces		11	300	43	31	64	12		10	10	13	67	561
Consumer promotions			88	70	185	12		12				85	452
Receptions		41	174	10	15	11	2	60				40	353
Consumer shows		18	70	69	32	16	1	10					216
Seminars		8	47		15	19		10		5		40	144
Familiarization tours		5	36	30	10	10	5	15	5	8		147	271
<i>Sub-total</i>	<i>1 450</i>	<i>835</i>	<i>6 409</i>	<i>737</i>	<i>750</i>	<i>740</i>	<i>70</i>	<i>305</i>	<i>27</i>	<i>49</i>	<i>21</i>	<i>2 869</i>	<i>14 262</i>
<b>Financial support for the tourism industry</b>													
RTAs	7 500												7 500
Grand Nord RTA	600												600
Regional tourism												7 800	7 800
Tourism events (PPC)												375	375
Partners in Québec (PPC)												500	500
Partners elsewhere (PPC)		60	350	210	40	25	91	20	15	50	25		886
<i>Sub-total</i>	<i>8 100</i>	<i>60</i>	<i>350</i>	<i>210</i>	<i>40</i>	<i>25</i>	<i>91</i>	<i>20</i>	<i>15</i>	<i>50</i>	<i>25</i>	<i>8 675</i>	<i>17 661</i>
<b>TOTAL</b>	<b>9 550</b>	<b>895</b>	<b>6 759</b>	<b>947</b>	<b>790</b>	<b>765</b>	<b>161</b>	<b>325</b>	<b>42</b>	<b>99</b>	<b>46</b>	<b>11 544</b>	<b>31 923</b>

# 1998-1999

## OPERATING PLAN

QUÉBEC					
CATEGORY	ACTIVITY	CITY	PRODUCT	DATE	BUDGET(\$ 000)
Publishing	Publications and promotional material	Territory		98-99-00	180.0
<i>Sub-total Publishing</i>					<i>180.0</i>
Advertising	Summer campaign		All	98-99-00	825.0
	Winter campaign		All	98-99-00	350.0
	Vacation leisure show		All	98-99-00	25.0
<i>Sub-total Advertising</i>					<i>1 200.0</i>
Press relations	Press tours		All	98-99-00	70.0
<i>Sub-total Press relations</i>					<i>70.0</i>
<b>Total</b>					<b>1 450.0</b>
<b>Total Québec</b>					<b>1 450.0</b>

MARITIMES					
CATEGORY	ACTIVITY	CITY	PRODUCT	DATE	BUDGET(\$ 000)
OPERATING ACTIVITIES					
Consumer shows	Blanche Neige	Bathurst, NB	Winter sports	98-10-24	1.0
	Flavour	Halifax, NS	Adventure	98-10-26	1.0
	Shediac Ski Club	Shediac, NB	Skiing	98-10-18	1.0
<i>Sub-total Consumer shows</i>					<i>3.0</i>
<b>Total Operating activities</b>					<b>3.0</b>
<b>Total Maritimes</b>					<b>3.0</b>

<b>TORONTO</b>					
CATEGORY	ACTIVITY	CITY	PRODUCT	DATE	BUDGET(\$ 000)
<b>Publishing</b>					
	Publications and promotional material	Territory		98-99-00	102.0
<i>Sub-total Publishing</i>					<i>102.0</i>
<b>Advertising</b>					
	Summer campaign	Territory	All	98-99-00	200.0
	Winter campaign	Territory	All	98-99-00	300.0
<i>Sub-total Advertising</i>					<i>500.0</i>
<b>Press relations</b>					
	Press tours Canada	Territory	All	98-99-00	50.0
<i>Sub-total Press relations</i>					<i>50.0</i>
<b>Total</b>					<b>652.0</b>
<b>OTHER EXPENDITURES</b>					
<b>Other operating expenditures</b>					
	Operating Toronto	Territory	All	98-99-00	65.0
	Professional support	Territory	All	98-99-00	35.0
<i>Sub-total Other operating expenditures</i>					<i>100.0</i>
<b>Total Other expenditures</b>					<b>100.0</b>
<b>OPERATING ACTIVITIES</b>					
<b>Marketplaces</b>					
	CSAE	London, ON	M & IT	98-07-00	1.0
	IABC International Conference	To be determined, LA	All	98-06-00	1.0
	Meeting & Incentive Canadian Trade Show	Toronto, ON	M & IT	98-08-00	2.0
	MPI Conference	Vancouver, BC	M & IT	99-01-00	1.0
	OMCA	Toronto, ON	Tours	98-11-00	0.5
	Québec Day	Toronto, ON	M & IT	99-02-00	0.0
	SCDA	London, ON	M & IT	98-07-00	3.0
	Ski Group	Toronto, ON	Ski	98-05-00	0.8
	Vusamart	Niagara Falls, US	All	98-09-00	2.0
<i>Sub-total Marketplaces</i>					<i>11.3</i>
<b>Receptions</b>					
	Cirque du Soleil	To be determined, US	All	98-99-00	10.0
	Cirque du Soleil	To be determined, ON	All	98-99-00	10.0
	Cirque du Soleil	Toronto, ON	M & IT	98-08-00	5.0
	Cirque du Soleil	Toronto, ON	Circuits	98-08-00	5.0
	MPI Awards	Toronto, ON	M & IT	99-03-00	4.5
	Québec Maritime Promotion	Toronto, ON	Tours	98-05-00	5.0
	SITE	Toronto, ON	M & IT	98-08-00	1.0
<i>Sub-total Receptions</i>					<i>40.5</i>

<b>TORONTO (cont.)</b>					
CATEGORY	ACTIVITY	CITY	PRODUCT	DATE	BUDGET(\$ 000)
<b>Consumer shows</b>					
	Hunting and Fishing Show	Toronto, ON	Hunting & Fishing	98-99-00	2.0
	Snowmobiler Show	Markham, ON	Snowmobiling	98-10-00	1.0
	The Great Canadian	Toronto, ON	All	98-04-00	2.5
	Maturity & Travel Show				
	The Travel & Leisure Show	Toronto, ON	All	98-04-00	3.0
	The Travel & Vacation Show	Ottawa, ON	All	98-04-00	1.5
	Toronto Ski Show	Toronto, ON	Ski	98-10-00	5.0
<b><i>Sub-total Consumer shows</i></b>					<b><i>15.0</i></b>
<b>Seminars</b>					
	Brewster Seminars	Vancouver, BC	All	98-04-00	1.6
	Brewster Seminars	Toronto, ON	All	98-04-00	1.6
	MPI PEC	Vancouver, BC	M & IT	99-01-00	5.0
<b><i>Sub-total Seminars</i></b>					<b><i>8.2</i></b>
<b>Familiarization tours</b>					
	SITE Inspection	Territory	Tours	98-99-00	2.5
	SITE Inspection for Meeting Professionals	Territory	M & IT	98-99-00	2.5
<b><i>Sub-total Familiarization tours</i></b>					<b><i>5.0</i></b>
<b>Total Operating activities</b>					<b>80.0</b>
<b>TRANSFER</b>					
<b>PPC - Partners outside Québec</b>					
	Receptive services	Toronto, ON	All	98-99-00	10.0
	Tour operators	Toronto, ON	Ski	98-99-00	25.0
	Tour operators	Toronto, ON	Summer	98-99-00	25.0
<b><i>Sub-total PPC - Partners outside Québec</i></b>					<b><i>60.0</i></b>
<b>Total Transfer</b>					<b>60.0</b>
<b>Total Toronto</b>					<b>892.0</b>

UNITED STATES					
CATEGORY	ACTIVITY	CITY	PRODUCT	DATE	BUDGET(\$ 000)
<b>Publishing</b>					
	Publications and promotional material	Territory		98-99-00	430.5
<i>Sub-total Publishing</i>					<b>430.5</b>
<b>Advertising</b>					
	Business campaign	Territory		98-99-00	250.0
	Summer/fall campaign	Territory		98-99-00	2 872.9
	Winter campaign	Territory		98-99-00	1 875.0
<i>Sub-total Advertising</i>					<b>4 997.9</b>
<b>Press relations</b>					
	Press tours	Territory	All	98-99-00	110.0
	Press tours	Territory	Hunting & fishing	98-99-00	70.0
<i>Sub-total Press relations</i>					<b>180.0</b>
<b>Total</b>					<b>5 608.4</b>
<b>OPERATING ACTIVITIES</b>					
<b>Marketplaces</b>					
	ABA Annual Convention	Milwaukee, WI	All	98-12-00	1.8
	NTA Annual Convention	St. Louis, MO	All	98-11-00	1.8
<i>Sub-total Marketplaces</i>					<b>3.6</b>
<b>Consumer promotions</b>					
	Official Tour Directory - Promo Industry	Various, United States	All	98-99-00	20.0
<i>Sub-total Consumer promotions</i>					<b>20.0</b>
<b>Consumer shows</b>					
	Budget - hunting and fishing shows in United States			98-99-00	28.0
		Springfield, VT	Hunting & fishing		
		Augusta, ME	Hunting & fishing		
		Wilmington, DE	Hunting & fishing		
		Rochester, NY	Hunting & fishing		
		Monroeville, AL	Hunting & fishing		
		Boston, MA	Hunting & fishing		
		Chicago, IL	Hunting & fishing		
		St. Louis, MO	Hunting & fishing		
		Philadelphia, PA	Hunting & fishing		
		Suffern, NY	Hunting & fishing		
		Chantilly, VA	Hunting & fishing		
		Harrisburg, PA	Hunting & fishing		
		Worcester, MA	Hunting & fishing		
		Edison, GA	Hunting & fishing		
		Indianapolis, IN	Hunting & fishing		
<i>Sub-total Consumer shows</i>					<b>28.0</b>

<b>UNITED STATES (cont.)</b>					
CATEGORY	ACTIVITY	CITY	PRODUCT	DATE	BUDGET(\$ 000)
<b>Seminars</b>					
	NTA/ABA Team Canada	Milwaukee, WI	All	98-99-00	4.0
	NTA/ABA Team Canada	St. Louis, MO	All	98-99-00	4.0
	Travel agents accreditation program			98-08-20	10.0
		Newport Beach, CA	All		
		Stamford, CT	All	98-05-28	
		San Francisco, CA	All	98-08-18	
		Morristown, NJ	All	98-05-29	
		Washington, DC	All	98-05-26	
		Dallas, TX	All	98-05-06	
		Manhattan, NY	All	98-05-27	
		Orlando, FL	All	98-05-08	
		Atlanta, GA	All	98-05-07	
		Santa Monica, CA	All	98-08-19	
<i>Sub-total Seminars</i>					<b>18.0</b>
<b>Total Operating activities</b>					<b>69.6</b>
<b>TRANSFER</b>					
<b>PPC - Partners outside Québec</b>					
	AA Vacations	Arlington, TX	City tourism	98-99-00	15.0
	Brewster	Banff, AB	Tours	98-99-00	5.0
	USA campaign		All	98-99-00	200.0
	Central Holiday Tours	Newark, NJ	Ski	98-99-00	12.0
	Collette Tours	Pawtucket, RH	Resorts	98-99-00	10.0
	Delta Vacations	Fort Lauderdale, FL	City tourism	98-99-00	15.0
	Gogo Tours	Ramsey, NJ	All	98-99-00	15.0
	Grand Circle	Territory	Tours	98-99-00	10.0
	Québec Adventures	Ellicot City, MD	Aventure	98-99-00	24.0
	Royal Northwest Holidays	Newcastle, WA	Tours	98-99-00	5.0
	Ski and Sand Travel	Boiling Springs, PA	Ski	98-99-00	12.0
	Ski Travel Unlimited	Arlington, VA	Ski	98-99-00	10.0
	Smithsonian	Washington, DC	Tours	98-99-00	5.0
	Yankee Holidays	Boston, MA	City tourism	98-99-00	12.0
<i>Sub-total PPC - Partners outside Québec</i>					<b>350.0</b>
<b>Total Transfer</b>					<b>350.0</b>
<b>Total United States</b>					<b>6 028.0</b>

**DALLAS**

CATEGORY	ACTIVITY	CITY	PRODUCT	DATE	BUDGET(\$ 000)
<b>OPERATING ACTIVITIES</b>					
<b>Marketplaces</b>					
	AA TrAAvel Expo	Miami, FL	Tours	98-10-00	1.2
	ASAE	Nashville, TN	M & IT	98-07-00	8.0
	ASTA Great Americas	Nashville, TN	Tours	98-05-14	0.7
	ASTA Regional Conference	Tampa, FL	Tours	98-05-28	0.7
	Limra International	Dallas, TX	M & IT	98-10-00	1.2
	Meeting Quest	Dallas, TX	M & IT	98-11-00	2.0
	Meeting Quest	Atlanta, GA	M & IT	98-10-00	2.0
	NTE Trade Show	New Orleans, LA	All	98-04-15	0.8
	NTE Trade Show	Fort Worth, TX	All	98-04-06	0.8
	NTE Trade Show	Birmingham, AL	All	98-04-13	0.8
	NTE Trade Show	Dallas, TX	All	98-04-07	0.8
	NTE Trade Show	Albuquerque, NM	All	98-04-01	0.8
	NTE Travel Show	San Antonio, TX	Tours	98-04-10	0.8
	Québec Marketplace	Atlanta, GA	Tours	98-09-00	10.0
	Québec Marketplace	Dallas, TX	Tours	98-09-00	10.0
	Showcase Canada	Atlanta, GA	M & IT	98-04-21	0.7
	Showcase Canada	Dallas, TX	M & IT	98-11-00	0.7
	Spotlight Canada	To be determined, FL	Tours	99-03-00	2.0
	Telemarketing	Territory	M & IT	98-99-00	25.0
	Telemarketing	Territory	Tours	98-99-00	2.0
	Texas SkiBid Fest	San Antonio, TX	Ski	98-04-03	0.5
	Travel Trade	Miami, FL	Tours	98-06-03	0.8
	WorldTravel Expo	Tampa, FL	Tours	98-04-01	0.5
	<i>Sub-total Marketplaces</i>				<i>72.7</i>
<b>Consumer promotions</b>					
	1998 International Ballet	Territory	Tours	98-99-00	2.0
	Dallas Opera Guild	Territory	Tours	98-99-00	2.0
	Rennert World Travel	Territory	Tours	98-99-00	3.0
	<i>Sub-total Consumer promotions</i>				<i>7.0</i>
<b>Receptions</b>					
	Braves/Expo game	Atlanta, GA	M & IT	98-09-00	1.5
	Cirque du Soleil	Atlanta, GA	M & IT	98-10-00	10.0
	Indy/Nascar	Atlanta, GA	M & IT	98-08-00	1.5
	Québec Day/Cirque du Soleil	Atlanta, GA	M & IT	98-05-00	15.0
	ASAE evening	Nashville, TN	M & IT	98-07-00	1.5
	<i>Sub-total Receptions</i>				<i>29.5</i>

<b>DALLAS (cont.)</b>					
CATEGORY	ACTIVITY	CITY	PRODUCT	DATE	BUDGET(\$ 000)
<b>Consumer shows</b>					
	Adventure Travel	Dallas, TX	Adventure	99-02-27	0.9
	Adventure/Outdoor Shows	Atlanta, GA	Adventure	98-03-00	0.8
	International Sport Show	To be determined, NC & SC	Adventure	98-03-00	1.0
	Ski show	Fort Lauderdale, FL	Ski	98-99-00	0.7
	Ski Group Show	Houston, TX	Ski	98-99-00	0.7
	Ski Group Show	To be determined, FL	Ski	98-99-00	0.7
	Ski Group Show	Dallas, TX	Ski	98-99-00	0.7
	Ski Group Show	Atlanta, GA	Ski	98-99-00	0.7
<i>Sub-total Consumer shows</i>					<b>6.2</b>
<b>Seminars</b>					
	Brewster Seminars	Houston, TX	All	98-04-00	1.0
	Brewster Seminars	Dallas, TX	All	98-04-00	1.0
	CP Hotels	Dallas, TX	M & IT	98-11-00	0.5
	CP Hotels	Oklahoma, OK	M & IT	98-11-00	0.5
	CP Hotels	Houston, TX	M & IT	98-11-00	0.5
	MPI	Dallas, TX	M & IT	98-06-00	0.6
	Ski	Atlanta, GA	Ski	98-99-00	0.6
<i>Sub-total Seminars</i>					<b>4.7</b>
<b>Familiarization tours</b>					
	CP Hotels, CTC	Montréal, QC	M & IT	98-11-00	1.0
	CP Hotels, CTC	Québec, QC	Tours	98-11-00	1.0
	CTC - Atlanta	Québec, QC	M & IT	98-08-00	0.7
	CTC - Atlanta	Montréal, QC	Tours	98-08-00	0.7
	CTC - Dallas	Québec, QC	M & IT	98-08-00	0.7
	CTC - Dallas	Montréal, QC	Tours	98-08-00	0.7
	CTC - Florida	Québec, QC	M & IT	98-09-00	0.7
	CTC - Florida	Montréal, QC	Tours	98-09-00	0.7
<i>Sub-total Familiarization tours</i>					<b>6.2</b>
<b>Total Operating activities</b>					<b>126.3</b>
<b>Total Dallas</b>					<b>126.3</b>

**CHICAGO**

CATEGORY	ACTIVITY	CITY	PRODUCT	DATE	BUDGET(\$ 000)
<b>OPERATING ACTIVITIES</b>					
<b>Marketplaces</b>					
	Chicago Tribune	Chicago, IL	Tours	98-99-00	1.2
	Cleveland Plain Dealer	Cleveland, OH	Tours	98-99-00	0.6
	CSAE	Chicago, IL	M & IT	98-12-00	2.4
	Detroit News	Detroit, MI	Tours	98-99-00	1.2
	Gay & Lesbian Trade Show	Chicago, IL	Tours	98-99-00	0.8
	IT & ME	Chicago, IL	M & IT	98-07-00	15.0
	Madison Woman in Travel	Madison, WI	Tours	98-00-00	0.4
	Milwaukee Sentinel	Milwaukee, WI	Tours	98-99-00	0.5
	Minneapolis Star Tribune	Minneapolis/ St. Paul, MN	Tours	98-99-00	1.2
	MPI	Chicago, IL	M & IT	98-00-00	1.0
	National Trade Show	Chicago, IL (suburbs)	Tours	98-99-00	0.5
	National Trade Show	Rockford, IL	Tours	98-99-00	0.5
	National Trade Show	Chicago, IL (Suburbs)	Tours	98-99-00	0.5
	NTE Trade Show	St. Louis, MO	Tours	98-04-00	0.8
	NTE Trade Show	Cleveland, OH	Tours	98-04-00	0.8
	NTE Trade Show	Columbus, OH	Tours	98-04-04	0.8
	NTE Trade Show	Omaha, NE	Tours	98-04-00	0.8
	NTE Trade Show	Milwaukee, WI	Tours	98-04-00	0.8
	NTE Trade Show	Chicago, IL	Tours	98-04-00	0.8
	NTE Trade Show	Kansas City, MO	Tours	98-04-00	0.8
	Ohio Bus Owners	Cleveland, OH	Tours	98-99-00	0.5
	PCMA	Chicago, IL	M & IT	98-00-00	1.0
	Peoria Trade Show	Peoria, IL	Tours	98-10-00	0.4
	Showcase Canada	St. Louis, MO	M & IT	98-06-00	0.7
	Showcase Canada	Minneapolis, MN	M & IT	98-04-28	0.7
	Showcase Canada	Detroit, MI	M & IT	98-00-00	0.9
	Showcase Canada	Chicago, IL	M & IT	98-04-30	0.7
	Showcase Canada	Kansas City, MO	M & IT	98-06-00	0.7
	Spotlight Canada	Cleveland, OH	Tours	98-99-00	0.9
	Spotlight Canada	Chicago, IL	Tours	98-99-00	0.9
	Spotlight Canada	Detroit, MI	Tours	98-99-00	0.9
	Spotlight Canada	Minneapolis/ St. Paul, MN	Tours	98-04-08	0.5
	St. Louis Post Dispatch	St. Louis, MO	Tours	98-99-00	1.2
	St. Louis Society of Association Executives	St. Louis, MO	M & IT	98-00-00	1.0
	Telemarketing	Chicago, IL	M & IT	98-99-00	25.0
	Telemarketing	Chicago, IL	Tours	98-99-00	2.0
<b>Sub-total Marketplaces</b>					<b>69.4</b>
<b>Consumer promotions</b>					
	Mall of America	Minneapolis/ St. Paul, MN		98-99-00	1.5
	Nieman Marcus	Territory		98-99-00	1.5
<b>Sub-total Consumer promotions</b>					<b>3.0</b>

<b>CHICAGO (cont.)</b>					
CATEGORY	ACTIVITY	CITY	PRODUCT	DATE	BUDGET(\$ 000)
<b>Receptions</b>					
	Corporate Accounts Dinner	Minneapolis, MN	M & IT	98-05-00	2.0
	Corporate Accounts Dinner	St. Louis, MO	M & IT	98-07-00	1.0
	Corporate Accounts	Denver, CO	M & IT	98-99-00	1.5
	Dinner/Theater	Dearborn, MI	M & IT	98-99-00	1.0
		Chicago, IL	M & IT	98-10-00	1.0
		Minneapolis, MN	M & IT	98-11-00	1.5
	Golf Outing Association	Chicago, IL	M & IT	98-06-00	2.8
	Québec Day	Minneapolis, MN	M & IT	98-09-00	4.0
	Québec Day/Cirque du Soleil	Chicago, IL	M & IT	98-07-00	15.0
	IT & ME evening	Chicago, IL	M & IT	98-07-00	2.0
	Sponsor Ski Club Meeting	Chicago, IL	Ski	98-99-00	0.5
	Sponsor Ski Club Meeting	To be determined, WI	Ski	98-00-00	0.5
	Sponsor Ski Club Meeting	To be determined, MI	Ski	98-00-00	0.5
	Theater Event Incentive	Chicago, IL	M & IT	98-05-00	1.6
<i>Sub-total Receptions</i>					<b>34.9</b>
<b>Consumer shows</b>					
	Ambassadeur	Indianapolis, IN	Tours	98-08-00	1.0
	Int. Adventure Travel Show	Rosemont, IL	Adventure	99-02-00	4.0
	Mayflower Tours	Chicago, IL	Tours	98-99-00	0.5
	Ski show	Detroit, IL	Ski	98-99-00	1.0
	Ski show	Chicago, IL	Ski	98-99-00	1.3
	Ski show	Cleveland, OH	Ski	98-99-00	1.3
<i>Sub-total Consumer shows</i>					<b>9.1</b>
<b>Seminars</b>					
	AAA	Detroit, MI	All	98-00-00	1.0
	Brewster Seminar	Cleveland, OH	All	98-04-00	1.6
	Ski	Chicago, IL	Ski	98-99-00	0.6
	Ski	Houston, TX	Ski	98-99-00	0.6
	Tour & Travel Breakfast	Minneapolis, MN	All	98-99-00	0.9
	Tour & Travel Breakfast	Detroit, MI	All	98-99-00	0.9
	Tour & Travel Breakfast	Cleveland, OH	All	98-99-00	0.8
	Tour & Travel Breakfast	Chicago, IL	All	98-00-00	0.8
<i>Sub-total Seminars</i>					<b>7.2</b>
<b>Familiarization tours</b>					
	To be determined	Territory	Tours	98-00-00	2.5
	To be determined	Territory	M & IT	98-00-00	2.5
<i>Sub-total Familiarization tours</i>					<b>5.0</b>
<b>Total Operating activities</b>					<b>128.6</b>
<b>Total Chicago</b>					<b>128.6</b>

**LOS ANGELES**

CATEGORY	ACTIVITY	CITY	PRODUCT	DATE	BUDGET(\$ 000)
<b>Press relations</b>					
	SATW - West	Montréal, QC		98-99-00	50.0
	Press tours	To be determined		98-99-00	35.0
<i>Sub-total Press relations</i>					<b>85.0</b>
<b>Total</b>					<b>85.0</b>
<b>OPERATING ACTIVITIES</b>					
<b>Marketplaces</b>					
	Affordable Meetings	San Jose, CA	M & IT	98-04-15	2.6
	California Sales Week	To be determined,	Tours	98-11-02	1.8
		CA (north and south)			
	Headliners Incentive	To be determined	M & IT	98-07-15	4.1
	Meeting Place	San Diego, CA	M & IT	98-07-00	2.0
	MPI WEC Conference	San Diego, CA	M & IT	98-07-12	1.0
	NCC MPI	San Francisco, CA	M & IT	99-02-04	0.8
	SCC MPI	Los Angeles, CA	M & IT	98-11-03	0.6
	Showcase Canada	San Francisco, CA	M & IT	98-09-00	0.7
	Showcase Canada	Seattle, WA	M & IT	98-09-00	0.7
	SITE	Palm Springs, CA		98-06-17	0.7
	Spotlight Canada	To be determined,		99-01-29	4.0
		CA (north and south)			
	Swing Thru Canada	Los Angeles, CA	M & IT	98-06-01	3.0
	Telemarketing	Territory	M & IT	98-99-00	25.0
	Telemarketing	Territory	Tours	98-99-00	2.0
	Tour EXPO 98 - Gay 4	Los Angeles, CA	Tours	98-10-31	1.6
<i>Sub-total Marketplaces</i>					<b>50.6</b>
<b>Consumer promotions</b>					
	Gay Friendly Québec 98	To be determined	City tourism	98-99-00	25.0
<i>Sub-total Consumer promotions</i>					<b>25.0</b>
<b>Receptions</b>					
	1998 MPI Golf Classic	Phoenix, AZ		98-05-20	0.8
	Chefs & Foods of Québec	Los Angeles, CA		98-99-00	5.0
	Chefs & Foods of Québec	San Francisco, CA		98-99-00	5.0
	ICPA	To be determined,	M & IT	98-12-00	7.0
		CA			
	International Association of Hispanic Meeting Planners	To be determined		98-05-01	3.0
<i>Sub-total Receptions</i>					<b>20.8</b>

<b>LOS ANGELES (cont.)</b>					
CATEGORY	ACTIVITY	CITY	PRODUCT	DATE	BUDGET(\$ 000)
<b>Consumer shows</b>					
	Adventure Show	San Francisco, CA	Adventure	99-03-03	5.0
	LA Times Travel	Los Angeles, CA	Tours	99-03-28	2.6
	Orange County	Anaheim, CA	Tours	99-02-01	2.0
<i>Sub-total Consumer shows</i>					<b>9.6</b>
<b>Seminars</b>					
	Air Canada	San Francisco, CA	Tours	98-06-10	1.5
	Air Canada	San Diego, CA	Tours	98-05-31	1.0
	Air Canada	Portland, OR	Tours	98-05-07	1.0
	Air Canada	Phoenix, AZ	Tours	99-03-31	1.0
	Air Canada	Las Vegas, NV	Tours	98-06-30	1.0
	Air Canada	Seattle, WA	Tours	98-05-28	1.0
	Tour - CTC - Air Can Tour	To be determined	Tours	98-07-00	3.0
	Operator Seminars				
	Travelscope Seminar	Los Angeles, CA	Tours	98-04-25	1.5
<i>Sub-total Seminars</i>					<b>11.0</b>
<b>Familiarization tours</b>					
	Tour	Territory	M & IT	98-99-00	2.5
	Tour	Territory	Tours	98-99-00	2.5
<i>Sub-total Familiarization tours</i>					<b>5.0</b>
<b>Total Operating activities</b>					<b>122.0</b>
<b>Total Los Angeles</b>					<b>206.9</b>

**NEW YORK - BUSINESS**

CATEGORY	ACTIVITY	CITY	PRODUCT	DATE	BUDGET(\$ 000)
<b>OPERATING ACTIVITIES</b>					
<b>Marketplaces</b>					
	Affordable Meetings	Washington, DC	M & IT	98-09-00	3.0
	Associations Conference/ Events Directors International	Norfolk, VA	M & IT	99-03-00	2.0
	Association for Incentive Mgmt.	To be determined	M & IT	98-05-00	2.0
	Beyond Borders Conference	New York, NY	M & IT	99-03-00	1.5
	FIM - Foundation Intl. Meetings	Washington, DC	M & IT	98-10-00	1.5
	Meeting World	New York, NY	M & IT	98-07-22	2.6
	MPI Education Day Trade Show	New York, NY	M & IT	98-09-00	0.5
	NYS Business Travel Trade Show	Rochester, NY	M & IT	98-05-00	0.5
	Pittsburgh Showcase	Pittsburgh, PA	M & IT	98-05-07	0.7
	Showcase Canada	New York, NY	M & IT	98-11-19	0.7
	Showcase Canada	Washington, DC	M & IT	98-11-12	0.7
	Showcase Canada	Rochester, NY	M & IT	98-05-05	0.7
	Telemarketing	Territory	M & IT	98-99-00	25.0
	<i>Sub-total Marketplaces</i>				<b>41.4</b>
<b>Receptions</b>					
	Canadians Hockey	New York, NY	M & IT	98-00-00	1.0
	Cirque du Soleil (pre-dinner)	New York, NY	M & IT	98-04-08	10.0
	Cirque du Soleil (tickets & dinner)	Washington, DC	M & IT	98-09-00	10.0
	Fashions On Ice Reception	New York, NY	M & IT	99-03-00	2.0
	Ice Skating	New York, NY	M & IT	98-05-00	2.0
	Performance/Dinner				
	Incentive Magazine Golf Tournament	Québec, PQ	M & IT	98-07-00	2.0
	James Beard Foundation	New York, NY	M & IT	99-02-00	3.0
	Montréal Expos Baseball	New York, NY	M & IT	98-05-00	0.6
	Montréal Symphony/dinner	New York, NY	M & IT	98-10-00	3.0
	MPI Ford Theater/Dinner Event	New York, NY	M & IT	98-10-00	10.0
	Promotion Corporate	Westchester, NY	M & IT	98-05-00	1.0
	Québec Day/Chef's Challenge	Philadelphia, PA	M & IT	99-04-00	5.0
	Québec Performers	Territory	M & IT	98-99-00	3.0
	<i>Sub-total Receptions</i>				<b>52.6</b>

<b>NEW YORK - BUSINESS (cont.)</b>					
CATEGORY	ACTIVITY	CITY	PRODUCT	DATE	BUDGET(\$ 000)
<b>Seminars</b>					
	Connecticut Sales Seminar	Hartford, CT	M & IT	98-10-00	0.2
	Maryland Sales Seminar	To be determined, MD	M & IT	98-06-00	0.2
	New Jersey Sales Seminar	To be determined, NJ	M & IT	98-07-00	0.2
	New Jersey Sales Seminar	To be determined, NJ	M & IT	99-01-00	0.1
	New York Sales Seminar	New York, NY	M & IT	98-12-00	0.2
	Philadelphia Sales Seminar	Philadelphia, PA	M & IT	99-01-00	0.1
	Upstate NY Sales Seminar	Rochester, NY	M & IT	98-04-00	0.1
	Upstate NY Sales Seminar	Syracuse, NY	M & IT	98-04-00	0.1
	Upstate NY Sales Seminar	Buffalo, NY	M & IT	98-04-00	0.1
	Virginia Sales Seminar	To be determined, VA	M & IT	98-06-00	0.2
	Washington DC Sales Seminar	Washington, DC	M & IT	98-11-00	0.2
	Westchester Sales Seminar	Westchester, NY	M & IT	98-05-00	0.2
<i>Sub-total Seminars</i>					<b>1.8</b>
<b>Familiarization tours</b>					
	Adventure Incentive Fam	Territory	M & IT	98-10-00	0.5
	Golf Resort Incentive Fam	Territory	M & IT	98-08-00	0.5
	Montréal Incentive Fam	Territory	M & IT	98-07-00	0.5
	Québec City Corporate Fam	Territory	M & IT	98-06-00	0.5
<i>Sub-total Familiarization tours</i>					<b>2.0</b>
<b>Total Operating activities</b>					<b>97.8</b>
<b>Total New York - Business</b>					<b>97.8</b>

**NEW YORK - PLEASURE**

CATEGORY	ACTIVITY	CITY	PRODUCT	DATE	BUDGET(\$ 000)
<b>OPERATING ACTIVITIES</b>					
<b>Marketplaces</b>					
	Adventrav	Philadelphia, PA	Tours	98-10-01	1.0
	Blue Bird Coach	Rochester, NY	Tours	99-01-01	0.4
	Educational Travel Alliance	Washington, DC	Tours	99-03-01	2.5
	Glamer Show	Long Island, NY	Tours	98-05-21	0.6
	Glamer Show	Albany, NY	Tours	98-05-07	0.6
	Glamer Show	Baltimore, MD	Tours	98-05-13	0.6
	Glamer Show	White Plains, NY	Tours	98-05-22	0.6
	Glamer Show	Philadelphia, PA	Tours	98-05-14	1.2
	Golfgroup	New York, NY	Golf	98-99-00	0.7
	NASTP Shows	Cromwell, CT	Tours	98-04-23	0.5
	NASTP Shows	Erie, PA	Tours	98-05-27	0.5
	National Trade Shows	To be determined, PA	Tours	98-09-21	0.9
	National Trade Shows	To be determined, NJ	Tours	98-09-21	0.9
	National Trade Shows	New York, NY	Tours	98-09-21	0.9
	Northeast Conference TFL	New York, NY	Tours	98-04-16	1.2
	Not for profit in travel - Comparison group	Washington, DC	All	98-05-27	0.6
	NTE Trade Show	Long Island, NY	Tours	98-05-04	0.6
	NTE Trade Show	Washington, DC	All	98-05-07	0.8
	NTE Trade Show	Baltimore, MD	All	98-05-07	0.8
	NTE Trade Show	Philadelphia, PA	All	98-05-06	0.8
	NTE Trade Show	Hartford, CT	All	98-05-12	0.8
	NTE Trade Show	Morristown, NJ	All	98-05-05	0.8
	NTE Trade Show	Cherry Hill, NJ	All	98-05-06	0.8
	PBA	Harrisburg, PA	Tours	98-99-00	0.8
	Québec Marketplace	New York, NY	Tours	98-04-16	10.0
	Shipboard Go Go/Liberty	New York, NY	Tours	98-06-01	0.3
	Skigroup '98	Pittsburgh, PA	Ski	98-04-01	0.5
	Skigroup '98	New York, NY	Ski	98-04-01	0.5
	Skigroup '98	Philadelphia, PA	Ski	98-04-01	0.5
	Skigroup '98	Washington, DC	Ski	98-04-01	0.5
	Skigroup '98	Secaucus, NY	Ski	98-05-01	0.5
	Spotlight Canada	Rochester, NY	Tours	98-10-00	0.5
	Spotlight Canada	" Upstate", NY	Tours	99-04-01	1.5
	Telemarketing	Territory	Tours	98-99-00	2.5
	Travel Expo	New York, NY	Tours	98-99-00	0.8
	USTOA/Annual Meeting	San Juan, Puerto Rico	All	98-12-00	5.0
	Westchester Agencies Show	White Plains, NY	Tours	98-04-01	0.4
<b>Sub-total Marketplaces</b>					<b>43.3</b>
<b>Receptions</b>					
	Cirque du Soleil - travel agents	New York, NY	Tours	98-04-14	10.0
	Cirque du Soleil - tour operators	To be determined	Tours	98-99-00	5.0
	Not for profit in travel - Annual Convention	Washington, DC	All	99-03-00	2.0
<b>Sub-total Receptions</b>					<b>17.0</b>

<b>NEW YORK - PLEASURE (cont.)</b>					
CATEGORY	ACTIVITY	CITY	PRODUCT	DATE	BUDGET(\$ 000)
<b>Consumer shows</b>					
	AAA of Wester Travel Show	Buffalo, NY	Tours	99-02-07	0.4
	AAA of Wester Travel Show	Syracuse, NY	Tours	99-03-14	0.4
	Baltimore Sun Travel Expo	Baltimore, MD	Tours	99-02-01	0.9
	Blue Bird Coach Trade Show	Rochester, NY	Tours	99-01-20	0.4
	Going Places	Staten Island, NY	Tours	99-03-10	0.4
	National Ski Show	Washington, DC	Ski	98-11-07	1.0
	National Ski Show	Long Island, NY	Ski	98-11-01	1.0
	National Ski Show	Philadelphia, PA	Ski	98-10-24	1.0
	North Coast Gofl Shows	Buffalo, NY	Golf	99-03-20	0.6
	North Coast Golf Shows	Pittsburgh, PA	Golf	99-02-27	0.6
	Travel Expo. Summer	Albany, NY	Tours	98-05-22	0.3
	Van Zile Travel Expo'98	Rochester, NY	Tours	98-10-01	0.5
	Washington Post Fest'98	Washington, DC	Tours	98-10-01	1.0
	Winter Sports Recreation	Rochester, NY	Ski	98-11-21	0.6
<i>Sub-total Consumer shows</i>					<b>9.1</b>
<b>Seminars</b>					
	Alliance of Westchester Travel Agencies	Tarrytown, NY	All	98-04-06	0.4
	Eastern Ski Council	Philadelphia, PA	Ski	98-99-00	1.0
	Gay & Lesbian	New York, NY	Tours	98-09-12	0.4
	New Jersey Jamboree	Wayne, NJ	Ski	98-11-01	0.3
	Travel agents seminars	Philadelphia, PA	Tours	98-99-00	1.3
	Ski	Secaucus, NJ	Ski	98-99-00	0.6
<i>Sub-total Seminars</i>					<b>4.0</b>
<b>Familiarization tours</b>					
	Summer product	Territory	Tours	98-99-00	2.5
	Winter product	Territory	Tours	98-99-00	2.5
<i>Sub-total Familiarization tours</i>					<b>5.0</b>
<b>Total Operating activities</b>					<b>78.4</b>
<b>Total New York - Pleasure</b>					<b>78.4</b>

<b>NEW ENGLAND</b>					
CATEGORY	ACTIVITY	CITY	PRODUCT	DATE	BUDGET(\$ 000)
<b>OPERATING ACTIVITIES</b>					
<b>Marketplaces</b>					
	AAA Southern NE 1998 auto Travel	Pawtucket, RI	Tours	98-03-19	0.3
	Boston Women in Travel	Boston, MA	Tours	98-04-29	1.0
	NTE Trade Show	Boston, MA	All	98-05-02	0.8
	NTE Trade Show	Burlington, MA	All	98-05-11	0.8
	Eco-evenings	Boston, MA	Tours	98-04-00	0.5
	Showcase CCT	Boston, MA	M & IT	98-11-18	0.7
	Telemarketing	Territory	M & IT	98-99-00	15.0
<i>Sub-total Marketplaces</i>					<b>19.1</b>
<b>Consumer promotions</b>					
	Advantage Card - WCRB	Territory	Tours	98-99-00	5.0
	Auction Youville	Boston, MA	Tours	98-04-00	2.5
	Promotion WCRB - FM	Boston, MA	Tours	98-99-00	15.0
	Appalachian Mountain Club (AMC) magazine	Territory	Tours	98-99-00	5.0
	Yankee Traveler Newsletter	Territory	Tours	98-99-00	5.0
<i>Sub-total Consumer promotions</i>					<b>32.5</b>
<b>Receptions</b>					
	Québec Day	Boston, MA	M & IT	98-00-00	15.0
	Tour operators evening	Boston, MA	Tours	98-05-00	2.0
	Tour operators evening	To be determined	Tours	98-09-00	2.0
<i>Sub-total Receptions</i>					<b>19.0</b>
<b>Consumer shows</b>					
	AAA Southern NE	Worcester, MA	Tours	98-03-21	0.3
	1998 Auto Travel				
	Adventrav	Boston, MA	Adventure	99-01-00	1.5
	Boston Sports Expo Show	Boston, MA	Ski	98-11-12	0.5
	Classical at Copley	Boston, MA	Tours	98-06-00	4.0
	Glamer	Newport, RI	Tours	98-05-07	0.3
	Glamer	Boston, MA	Tours	98-05-20	0.3
	NASTP	To be determined	Tours	98-99-00	0.5
	Travel Experience	Pawtucket, RI	Tours	98-10-27	0.6
	Travel Night	Barre, VT	Tours	98-99-00	0.5
<i>Sub-total Consumer shows</i>					<b>8.4</b>
<b>Seminars</b>					
	Nemice	Boston, MA	M & IT	98-04-23	0.5
<i>Sub-total Seminars</i>					<b>0.5</b>
<b>Familiarization tours</b>					
	AAA	Territory, MA	Tours	98-09-00	1.5
	AAA	Territory, RI	Tours	98-05-00	1.5
	Soft Adventure	Territory	Adventure	98-00-00	1.5
	Bienvenue Québec - Group Leaders	Québec, QC	City tourism	98-00-00	5.0
	Conway	Territory	Tours	98-00-00	1.5
	"Musical Québec" tour operators	Territory	Tours	98-00-00	2.0
<i>Sub-total Familiarization tours</i>					<b>13.0</b>
<b>Total Operating activities</b>					<b>92.5</b>
<b>Total New England</b>					<b>92.5</b>

<b>MONTRÉAL</b>					
CATEGORY	ACTIVITY	CITY	PRODUCT	DATE	BUDGET(\$ 000)
Press relations					
	Press tours	Multi-market	All	98-99-00	90.0
<i>Sub-total Press relations</i>					<i>90.0</i>
<b>Total</b>					<b>90.0</b>
OTHER EXPENDITURES					
Canvassing					
	International representation			98-99-00	2 000.0
<i>Sub-total Canvassing</i>					<i>2 000.0</i>
Other operating expenditures					
	Operating Montréal			98-99-00	120.0
	Travel expenses			98-99-00	215.0
	Professional support	Montréal		98-99-00	65.0
<i>Sub-total Other operating expenditures</i>					<i>400.0</i>
<b>Total Other expenditures</b>					<b>2 400.0</b>
OPERATING ACTIVITIES					
Marketplaces					
	Rendez-Vous Canada	Montréal	Tours	98-05-05	67.0
<i>Sub-total Marketplaces</i>					<i>67.0</i>
Consumer promotions					
	Air Canada - Launch - Tel-Aviv flight	Montréal	Multi-product	98-05-20	20.0
	Theme tours		Tours	98-99-00	50.0
	Getaways		Tours	98-99-00	15.0
<i>Sub-total Consumer promotions</i>					<i>85.0</i>
Receptions					
	Various			98-99-00	5.0
	IGLTA	To be determined	City tourism	98-05-14	15.0
	Reverse Marketplace	Montréal	Tours	98-09-00	20.0
<i>Sub-total Receptions</i>					<i>40.0</i>
Seminars					
	ACTA	Québec	Tours	98-99-00	10.0
	APTAQ	Québec	Adventure	98-99-00	20.0
	Aboriginal tourism	Québec	Adventure	98-99-00	10.0
<i>Sub-total Seminars</i>					<i>40.0</i>

<b>MONTRÉAL (cont.)</b>					
CATEGORY	ACTIVITY	CITY	PRODUCT	DATE	BUDGET(\$ 000)
<b>Familiarization tours</b>					
	Bienvenue Québec	Montréal	Tours	98-11-00	12.0
	Outdoor Channel/ Canadian Sportfishing	Montréal	Hunting & fishing	98-99-00	10.0
	Québec/Maritimes	Québec	Tours	98-99-00	35.0
	Rendez-Vous Canada	Montréal	Tours	98-05-05	60.0
	Rendez-Vous Ski Québec		Ski	98-99-00	20.0
	Reverse Marketplace	Montréal	Tours	98-09-00	10.0
<i>Sub-total Familiarization tours</i>					<b>147.0</b>
<b>Total Operating activities</b>					<b>379.0</b>
<b>TRANSFER</b>					
<b>Northern RTA</b>					
	Nord du Québec RTA		Multi-product	98-99-00	600.0
<i>Sub-total Northern RTA</i>					<b>600.0</b>
<b>PPC - Tourism events</b>					
	Various projects		Tours	98-99-00	375.0
<i>Sub-total PPC - Tourism events</i>					<b>375.0</b>
<b>PPC - Local partners</b>					
	ABCQ	Montréal	Conventions	98-99-00	15.0
	Association des centres de ski de fond	Montréal	Ski	98-99-00	10.0
	Association des relais de santé	Montréal	Resorts	98-99-00	25.0
	Association des terrains de golf	Montréal	Golf	98-99-00	5.0
	CAA/Km Voyages	Montréal	Tours	98-99-00	100.0
	International cruises	Montréal	Cruises	98-99-00	10.0
	Delit de fuite	Montréal	Tours	98-99-00	13.0
	Federation of Québec Outfitters	Montréal	Hunting & fishing	98-99-00	55.0
	Country inns	Montréal	Resorts	98-99-00	50.0
	Snowmobiling	Montréal	Snowmobiling	98-99-00	75.0
	Option Art	Montréal	Tours	98-99-00	20.0
	Relais et châteaux	Montréal	Resorts	98-99-00	10.0
	Safari Québec (Jonview)	Montréal	Tours	98-99-00	15.0
	Société touristique INNU	Montréal	Adventure	98-99-00	15.0
	Aboriginal tourism	Montréal	Adventure	98-99-00	15.0
	Receptive tours	Montréal	Tours	98-99-00	57.0
	Travel and leisure	Montréal	Tours	98-99-00	10.0
<i>Sub-total PPC - Local partners</i>					<b>500.0</b>
<b>Support for regional tourism</b>					
	Lodging tax		Multi-product	98-99-00	7 800.0
<i>Sub-total Support for regional tourism</i>					<b>7 800.0</b>
<b>Financial support for RTAs</b>					
	RTAs - all regions		Multi-product	98-99-00	7 500.0
<i>Sub-total Financial support for RTAs</i>					<b>7 500.0</b>
<b>Total Transfer</b>					<b>16 775.0</b>
<b>Total Montréal</b>					<b>19 644.0</b>

<b>PARIS</b>					
CATEGORY	ACTIVITY	CITY	PRODUCT	DATE	BUDGET(\$ 000)
<b>Publishing</b>					
	Publications and promotional material	Territory		98-99-00	115.0
<i>Sub-total Publishing</i>					<i>115.0</i>
<b>Advertising</b>					
	Poster on bus side campaign	Territory		98-99-00	45.0
	Television infomercial - summer and fall	Territory		98-99-00	50.0
	Trade press inserts and "Passages Obligés"	Territory		98-99-00	40.0
	Direct marketing	Territory		98-99-00	100.0
	Direct marketing industry	Territory		98-99-00	30.0
<i>Sub-total Advertising</i>					<i>265.0</i>
<b>Press relations</b>					
	Press travel	Territory		98-99-00	135.0
<i>Sub-total Press relations</i>					<i>135.0</i>
<b>Total</b>					<b>515.0</b>
<b>OPERATING ACTIVITIES</b>					
<b>Marketplaces</b>					
	ADONET	Paris, France		99-02-00	1.0
	Atelier Québec	Paris, France	All	98-11-12	20.0
	BTF	Brussels, Belgium	Tours	98-11-00	5.0
	Meeting & Weltra	Brussels, Belgium	M & IT	99-03-00	5.0
	Top Resa	Deauville, France	Tours	98-09-00	12.0
<i>Sub-total Marketplaces</i>					<i>43.0</i>
<b>Consumer promotions</b>					
	Operation Consumer shows	Territory		98-99-00	70.0
<i>Sub-total Consumer promotions</i>					<i>70.0</i>
<b>Receptions</b>					
	Various	Brussels, Belgium	Tours	98-99-00	5.0
	Various	Paris, France	All	98-99-00	5.0
<i>Sub-total Receptions</i>					<i>10.0</i>

<b>PARIS (cont.)</b>					
CATEGORY	ACTIVITY	CITY	PRODUCT	DATE	BUDGET(\$ 000)
<b>Consumer shows</b>					
	Country Show	Paris, France	Tours	98-05-15	2.0
	Mahana	Lyon, France	Tours	99-03-13	5.0
	Partir en hiver	Paris, France	Tours	98-10-25	7.0
	Rando Expo	Paris, France	Tours	98-04-06	9.0
	Salon des vacances	Brussels, Belgium	Tours	99-03-21	5.0
	Salon des vacances du Luxembourg	Luxemburg	Tours	99-01-10	3.0
	Salon du tourisme	Nantes, France	Tours	98-02-25	5.0
	Salon du tourisme et des voyages	Rennes, France	Tours	99-01-23	3.0
	Salon mondial du tourisme	Paris, France	Tours	99-03-26	13.0
	SITV	Colmar, France	Tours	98-11-08	4.0
	Tempo Allegro – Salon des seniors	Paris, France	Tours	98-06-15	5.0
	Tourissima	Lille, France	Tours	99-02-07	5.0
	Tourissimo	Strasbourg, France	Tours	99-03-20	3.0
<i>Sub-total Consumer shows</i>					<b>69.0</b>
<b>Familiarization tours</b>					
	Various tours	Territory	All	98-99-00	30.0
<i>Sub-total Familiarization tours</i>					<b>30.0</b>
<b>Total Operating activities</b>					<b>222.0</b>
<b>TRANSFER</b>					
<b>PPC - Partners outside Québec</b>					
	Vacances Air Transat print media campaign	Territory		98-99-00	56.0
	Décathlon	Territory	Adventure	98-99-00	10.0
	Television infomercial - winter - CTC	Territory		98-99-00	50.0
	Nouvelles Frontières campaign	Territory		98-99-00	70.0
	Belgian tour operators	Territory		98-99-00	14.0
	Tour operators specializing in the great outdoors	Territory		98-99-00	10.0
<i>Sub-total PPC - Partners outside Québec</i>					<b>210.0</b>
<b>Total Transfer</b>					<b>210.0</b>
<b>Total Paris</b>					<b>947.0</b>

<b>LONDON</b>					
CATEGORY	ACTIVITY	CITY	PRODUCT	DATE	BUDGET(\$ 000)
<b>Publishing</b>					
	Publications and promotional material	Territory		98-99-00	57.5
<i>Sub-total Publishing</i>					<b>57.5</b>
<b>Advertising</b>					
	C & IT or M & IT Magazine	Territory		98-99-00	10.0
	Canada Travel Planner and Canada Winter Guide	Territory		98-99-00	12.0
	Essentially America	Territory		98-99-00	20.0
	Globespan	Territory		98-99-00	42.0
	National press - Québec	Territory		98-99-00	200.0
	Selling Long haul, TTG, Travel Weekly	Territory		98-99-00	25.0
	Special Trade Promotion Québec/Ontario/Travel Weekly/All Canada Airlines	Various, UK	All	98-99-00	11.0
<i>Sub-total Advertising</i>					<b>320.0</b>
<b>Press relations</b>					
	HDM Linx - Public relations agency	Territory		98-99-00	55.0
	Press tours	Territory	All	98-99-00	30.0
<i>Sub-total Press relations</i>					<b>85.0</b>
<b>Total</b>					<b>462.5</b>
<b>OPERATING ACTIVITIES</b>					
<b>Marketplaces</b>					
	Club Canada series of shows	Various, UK	All	98-99-00	5.0
	Confex	London, UK	M & IT	99-03-00	6.0
	Spotlight Canada	London, UK	All	99-03-00	10.0
	WTM	London, UK	All	98-11-00	10.0
<i>Sub-total Marketplaces</i>					<b>31.0</b>
<b>Consumer promotions</b>					
	CTC Template & CTC TV	Territory		98-99-00	135.0
	Essentially Québec	Territory		98-99-00	50.0
<i>Sub-total Consumer promotions</i>					<b>185.0</b>
<b>Receptions</b>					
	Canada Travel Awards	London, UK	All	99-03-00	3.0
	Cirque du Soleil	London, UK	All	99-01-00	5.0
	M & IT Awards	London, UK	M & IT	99-03-00	3.0
	Ontario Québec Evening	London, UK	All	99-03-00	4.0
<i>Sub-total Receptions</i>					<b>15.0</b>

<b>LONDON (cont.)</b>					
CATEGORY	ACTIVITY	CITY	PRODUCT	DATE	BUDGET(\$ 000)
<b>Consumer shows</b>					
	Destinations '99	London, UK	All	99-02-00	10.0
	Dublin Show	Dublin, Ireland	All	99-01-00	5.0
	Holiday Show G-Mex	Manchester, UK	All	99-01-00	8.0
	Ski Shows	London, UK	Ski	98-10-00	5.0
	Vakantie	Utrecht, UK	All	99-01-00	4.0
<i>Sub-total Consumer shows</i>					<b>32.0</b>
<b>Seminars</b>					
	Canada Workshops Training Seminar	To be determined, UK	All	98-99-00	5.0
	Club Canada	Guernsey, UK	All	98-99-00	1.7
	Club Canada	Swindon, UK	All	98-99-00	1.7
	Club Canada	Jersey, UK	All	98-99-00	1.6
	Nordic Countries	To be determined, Scandinavia	All	98-99-00	2.5
	Visit USA and Canada Workshop	To be determined, Denmark	All	99-03-00	2.5
<i>Sub-total Seminars</i>					<b>14.9</b>
<b>Familiarization tours</b>					
	Various tours	To be determined	All	98-99-00	10.0
<i>Sub-total Familiarization tours</i>					<b>10.0</b>
<b>Total Operating activities</b>					<b>287.9</b>
<b>TRANSFER</b>					
<b>PPC - Partners outside Québec</b>					
	Advantage/Naita	Territory	Tours	98-99-00	5.0
	All Canada	Territory	All	98-99-00	8.0
	Bluebird	Territory	All	98-99-00	8.0
	Frontier Holidays	Territory	Ski	98-99-00	3.0
	Travel 4	Territory	All	98-99-00	8.0
	Travelbag	Territory	Summer, Winter	98-99-00	8.0
<i>Sub-total PPC - Partners outside Québec</i>					<b>40.0</b>
<b>Total Transfer</b>					<b>40.0</b>
<b>Total London</b>					<b>790.4</b>

<b>DÜSSELDORF</b>					
CATEGORY	ACTIVITY	CITY	PRODUCT	DATE	BUDGET(\$ 000)
<b>Publishing</b>					
	Publications and promotional material	Territory		98-99-00	57.5
<i>Sub-total Publishing</i>					<i>57.5</i>
<b>Advertising</b>					
	Television campaign - CTC/Air Canada	Territory		98-99-00	100.0
	Consumer advertising campaign	Territory		98-99-00	200.0
	Trade advertising campaign	Territory		98-99-00	30.0
<i>Sub-total Advertising</i>					<i>330.0</i>
<b>Press relations</b>					
	W&P Wilde & Partner agency	Territory		98-99-00	180.0
	Press tours	Territory		98-99-00	40.0
<i>Sub-total Press relations</i>					<i>220.0</i>
<b>Total</b>					<b>607.5</b>
<b>OPERATING ACTIVITIES</b>					
<b>Marketplaces</b>					
	EIBTM	Geneva, Switzerland	M & IT	98-99-00	35.0
	ITB	Berlin, Germany	All	99-03-00	15.0
	Meeting & Incentive Jahrmakt	Hamburg, Germany	M & IT	98-11-11	4.0
	Meeting & Incentive Jahrmakt	Stuttgart, Germany	M & IT	98-11-12	3.0
	Meeting & Incentive Jahrmakt	Düsseldorf, Germany	M & IT	98-11-10	3.0
	Travel Trade Workshop	Montreux, Switzerland	All	98-11-00	4.0
<i>Sub-total Marketplaces</i>					<i>64.0</i>
<b>Consumer promotions</b>					
	Canada Showcase	Geneva, Switzerland	All	98-11-27	3.0
	Canada Showcase	Berne, Switzerland	All	98-11-26	3.0
	Derby Cycle	Various, Germany		98-99-00	2.5
	Fit for Canada	Hamburg, Germany	All	98-04-00	2.0
	Transglobe	Muritz, Germany	Adventure	98-05-20	1.5
<i>Sub-total Consumer promotions</i>					<i>12.0</i>
<b>Receptions</b>					
	Cirque du Soleil	Frankfurt, Germany	Tours,	98-11-00	2.5
	Cirque du Soleil	Hamburg, Germany	Tours,	98-05-00	2.5
	Reisemarkt	Cologne, Germany	All	98-11-00	1.4
	CMT evening	Stuttgart, Germany	Tours	99-01-00	1.0
	EIBTM evening	Geneva, Switzerland	M & IT	98-99-00	2.0
	St. Jean Baptiste evening	Romande Switzerland	Tours	98-06-24	2.0
<i>Sub-total Receptions</i>					<i>11.4</i>

**DÜSSELDORF (cont.)**

CATEGORY	ACTIVITY	CITY	PRODUCT	DATE	BUDGET(\$ 000)
<b>Consumer shows</b>					
	CBR	Munich, Germany	All	99-02-00	1.4
	CMT	Stuttgart, Germany	All	99-01-00	1.4
	Ferien	Vienna, Austria	All	99-01-00	1.0
	FESPO	Zurich, Switzerland	All	99-01-00	4.5
	FESPO	Geneva, Switzerland	All	99-02-00	4.0
	Reisen	Hamburg, Germany	All	99-02-00	1.4
	TOURF	Salzburg, Austria	All	99-01-00	1.0
	Touristik Caravan	Leipzig, Germany	All	98-12-00	1.4
<i>Sub-total Consumer shows</i>					<b>16.1</b>
<b>Seminars</b>					
	Airtours	Various, Germany	All	99-02-00	3.0
	Canada Roadshow	Salzburg, Austria	All	99-03-00	0.6
	Canada Roadshow	Linz, Austria	All	99-03-00	0.6
	Canada Roadshow	Vienna, Austria	All	99-03-00	0.6
	Canada Roadshow	Graz, Austria	All	99-03-00	0.6
	Canada Roadshow	Innsbruck, Austria	All	99-03-00	0.6
	DER	Various, Germany	All	99-01-00	3.0
	Meier's Weltreisen	Various, Germany	All	99-01-00	3.0
	Reisebüro-stammtisch	Various, Germany	All	98-99-00	3.0
	Seminars Canada	Zurich, Switzerland	All	98-00-00	2.0
	Seminars Canada	Geneva, Switzerland	All	98-00-00	2.0
<i>Sub-total Seminars</i>					<b>19.0</b>
<b>Familiarization tours</b>					
	Travel agents - CTC	Territory	Tours	98-11-00	5.0
	Air Canada	Territory	Tours	98-09-00	3.0
	CSP (Canada Specialist Program)	Territory	Tours	98-00-00	2.0
<i>Sub-total Familiarization tours</i>					<b>10.0</b>
<b>Total Operating activities</b>					<b>132.5</b>
<b>TRANSFER</b>					
<b>PPC - Partners outside Québec</b>					
	Eest Reisen Germany	Territory	Tours	98-99-00	15.0
	Meier's Weltreisen	Territory	Tours	98-99-00	10.0
<i>Sub-total PPC - Partners outside Québec</i>					<b>25.0</b>
<b>Total Transfer</b>					<b>25.0</b>
<b>Total Düsseldorf</b>					<b>765.0</b>

<b>SPAIN</b>					
CATEGORY	ACTIVITY	CITY	PRODUCT	DATE	BUDGET(\$ 000)
Press relations					
	Media tours	Territory		98-99-00	5.0
	TVE	Territory		98-99-00	25.0
<i>Sub-total Press relations</i>					<i>30.0</i>
<b>Total</b>					<b>30.0</b>
OPERATING ACTIVITIES					
Marketplaces					
	FITUR 99	Madrid	Tours	99-01-00	6.5
<i>Sub-total Marketplaces</i>					<i>6.5</i>
<b>Total Operating activities</b>					<b>6.5</b>
TRANSFER					
PPC - Partners outside Québec					
	Adomo	Territory		98-99-00	5.0
	Adventure Turismo	Territory		98-99-00	5.0
<i>Sub-total PPC - Partners outside Québec</i>					<i>10.0</i>
<b>Total Transfer</b>					<b>10.0</b>
<b>Total Spain</b>					<b>46.5</b>

ITALY					
CATEGORY	ACTIVITY	CITY	PRODUCT	DATE	BUDGET(\$ 000)
Press relations					
	Press tours	Territory		98-99-00	20.0
<i>Sub-total Press relations</i>					<i>20.0</i>
<b>Total</b>					<b>20.0</b>
OPERATING ACTIVITIES					
Marketplaces					
	BIT	To be determined	M & IT	99-02-00	2.5
	SKIPASS	Modena	M & IT	98-10-00	3.0
<i>Sub-total Marketplaces</i>					<i>5.5</i>
Receptions					
	BIT	To be determined	M & IT	99-02-00	1.5
<i>Sub-total Receptions</i>					<i>1.5</i>
Consumer shows					
	Exa 99	Brescia	Multi-products	99-02-00	1.5
<i>Sub-total Consumer shows</i>					<i>1.5</i>
Familiarization tours					
	Various familiarization tours	Territory	M & IT	98-99-00	5.0
<i>Sub-total Familiarization tours</i>					<i>5.0</i>
<b>Total Operating activities</b>					<b>13.5</b>
TRANSFER					
PPC - Partners outside Québec					
	Caleidoscopio	Territory	M & IT	98-99-00	6.0
	Canadian Airlines	Territory	M & IT	98-99-00	55.0
	Giver (winter booklet)	Territory	M & IT	98-99-00	5.0
	Hotelplan (winter booklet)	Territory	M & IT	98-99-00	5.0
	Sei Viaggi	Territory	M & IT	98-99-00	10.0
<i>Sub-total PPC - Partners outside Québec</i>					<i>81.0</i>
<b>Total Transfer</b>					<b>81.0</b>
<b>Total Italy</b>					<b>114.5</b>

<b>TOKYO</b>					
CATEGORY	ACTIVITY	CITY	PRODUCT	DATE	BUDGET(\$ 000)
<b>Publishing</b>					
	Publications and promotional material	Territory		98-99-00	57.5
<i>Sub-total Publishing</i>					<i>57.5</i>
<b>Advertising</b>					
	Cinema campaign	Territory		98-99-00	98.0
	Canada East Welcome Guide	Territory		98-99-00	2.0
<i>Sub-total Advertising</i>					<i>100.0</i>
<b>Press relations</b>					
	Ontario-Québec Tourism News	Territory		98-99-00	10.0
	Press tours and television	Territory		98-99-00	30.0
<i>Sub-total Press relations</i>					<i>40.0</i>
<b>Total</b>					<b>197.5</b>
<b>OPERATING ACTIVITIES</b>					
<b>Consumer promotions</b>					
	Cinema campaign	Territory	Promotion	98-99-00	12.0
<i>Sub-total Consumer promotions</i>					<i>12.0</i>
<b>Receptions</b>					
	Air Canada	Osaka, Japan		98-09-00	4.0
	Québec DMO Mission	Tokyo, Japan	All	99-02-00	8.0
	Québec DMO Mission	Nagoya, Japan	All	99-02-00	8.0
	Québec DMO Mission	Osaka, Japan	All	99-02-00	8.0
	Québec DMO Mission	Fukuoka, Japan	All	99-02-00	8.0
	Québec DMO Mission	Hiroshima, Japan	All	99-02-00	8.0
	Québec Reception	Nagoya, Japan		98-12-00	4.0
	Québec Reception	Tokyo, Japan		98-12-00	4.0
	Québec Reception	Osaka, Japan		98-12-00	4.0
	The 21st Canada Cup Golf Tournament	Ibaraki, Japan		98-06-01	4.0
<i>Sub-total Receptions</i>					<i>60.0</i>
<b>Consumer shows</b>					
	The 8th World Travel Fair	Tokyo, Japan	All	98-11-13	10.0
<i>Sub-total Consumer shows</i>					<i>10.0</i>

<b>TOKYO (cont.)</b>					
CATEGORY	ACTIVITY	CITY	PRODUCT	DATE	BUDGET(\$ 000)
<b>Seminars</b>					
	Industry - CTC	Osaka, Japan	All	98-99-00	2.5
	Industry - CTC	Sapporo, Japan	All	98-99-00	2.5
	Industry - CTC	Nagoya, Japan	All	98-99-00	2.5
	Industry - CTC	Fukuoka, Japan	All	98-99-00	2.5
<i>Sub-total Seminars</i>					<b>10.0</b>
<b>Familiarization tours</b>					
	AC/TQ/ONT Eastern Canada	Territory	All	98-05-00	5.0
	CAIL/TQ/Tourism Massachusetts	Territory	All	98-00-00	5.0
	NW/TQ/Tourism Massachusetts	Territory	All	98-00-00	5.0
<i>Sub-total Familiarization tours</i>					<b>15.0</b>
<b>Total Operating activities</b>					<b>107.0</b>
<b>TRANSFER</b>					
PPC - Partners outside Québec					
	J&C Travel	Territory	All	98-99-00	10.0
	JTB Kansai Media Sales	Territory	All	98-99-00	10.0
<i>Sub-total PPC - Partners outside Québec</i>					<b>20.0</b>
<b>Total Transfer</b>					<b>20.0</b>
<b>Total Tokyo</b>					<b>324.5</b>

<b>SOUTHEAST ASIA</b>					
CATEGORY	ACTIVITY	CITY	PRODUCT	DATE	BUDGET(\$ 000)
Advertising	Advertising	To be determined, Asia (southeast)	All	98-99-00	6.6
<i>Sub-total Advertising</i>					<i>6.6</i>
Press relations	Press tours	To be determined, Asia (southeast)	All	98-99-00	20.0
<i>Sub-total Press relations</i>					<i>20.0</i>
<b>Total</b>					<b>26.6</b>
<b>OPERATING ACTIVITIES</b>					
Marketplaces	Showcase Canada	To be determined, Asia (southeast)	All	98-10-00	10.0
<i>Sub-total Marketplaces</i>					<i>10.0</i>
Seminars	Southeast Tour Operators	To be determined, Asia (southeast)	All	98-99-00	5.0
<i>Sub-total Seminars</i>					<i>5.0</i>
Familiarization tours	SITE Inspection	Territory	Tours	98-99-00	7.5
<i>Sub-total Familiarization tours</i>					<i>7.5</i>
<b>Total Operating activities</b>					<b>22.5</b>
<b>TRANSFER</b>					
PPC - Partners outside Québec	CTC/CAI/Ontario	Taiwan	All	98-99-00	50.0
<i>Sub-total PPC - Partners outside Québec</i>					<i>50.0</i>
<b>Total Transfer</b>					<b>50.0</b>
<b>Total Southeast Asia</b>					<b>99.1</b>

<b>MEXICO</b>					
CATEGORY	ACTIVITY	CITY	PRODUCT	DATE	BUDGET(\$ 000)
Press relations					
	Media tours	Territory		98-99-00	2.5
<i>Sub-total Press relations</i>					<i>2.5</i>
<b>Total</b>					<b>2.5</b>
<b>OPERATING ACTIVITIES</b>					
Marketplaces					
	Conozca Canada '99	Mexico City		98-99-00	3.0
<i>Sub-total Marketplaces</i>					<i>3.0</i>
<b>Total Operating activities</b>					<b>3.0</b>
<b>TRANSFER</b>					
PPC - Partners outside Québec					
	To be determined	To be determined		98-99-00	10.0
<i>Sub-total PPC - Partners outside Québec</i>					<i>10.0</i>
<b>Total Transfer</b>					<b>10.0</b>
<b>Total Mexico</b>					<b>15.5</b>

<b>BRAZIL</b>					
CATEGORY	ACTIVITY	CITY	PRODUCT	DATE	BUDGET(\$ 000)
Advertising	Panrotas	Territory	Tours	98-99-00	3.0
<i>Sub-total Advertising</i>					<i>3.0</i>
Press relations	Media tours	Territory		98-99-00	2.5
<i>Sub-total Press relations</i>					<i>2.5</i>
<b>Total</b>					<b>5.5</b>
<b>OPERATING ACTIVITIES</b>					
Marketplaces	ABAV	To be determined		98-99-00	3.0
	Braztoa	Sao Paulo, Brazil		98-99-00	6.5
<i>Sub-total Marketplaces</i>					<i>9.5</i>
<b>Total Operating activities</b>					<b>9.5</b>
<b>TRANSFER</b>					
PPC - Partners outside Québec	South Travel Brazil and others	Territory		98-99-00	15.0
<i>Sub-total PPC - Partners outside Québec</i>					<i>15.0</i>
<b>Total Transfer</b>					<b>15.0</b>
<b>Total Brazil</b>					<b>30.0</b>

<b>AUSTRALIA</b>					
CATEGORY	ACTIVITY	CITY	PRODUCT	DATE	BUDGET(\$ 000)
Advertising	Advertising 1998-1999	Territory		98-99-00	4.5
<i>Sub-total Advertising</i>					<i>4.5</i>
Press relations	Media tours	Territory		98-99-00	2.5
<i>Sub-total Press relations</i>					<i>2.5</i>
<b>Total</b>					<b>7.0</b>
<b>OPERATING ACTIVITIES</b>					
Marketplaces	Corroborees 1999	Tours (5 cities)		99-01-00	8.5
<i>Sub-total Marketplaces</i>					<i>8.5</i>
Familiarization tours	CTC	To be determined	Tours	98-99-00	5.0
<i>Sub-total Familiarization tours</i>					<i>5.0</i>
<b>Total Operating activities</b>					<b>13.5</b>
<b>TRANSFER</b>					
PPC - Partners outside Québec	Tour Operators	Territory		98-99-00	10.0
<i>Sub-total PPC - Partners outside Québec</i>					<i>10.0</i>
<b>Total Transfer</b>					<b>10.0</b>
<b>Total Australia</b>					<b>30.5</b>

<b>NEW ZEALAND</b>					
CATEGORY	ACTIVITY	CITY	PRODUCT	DATE	BUDGET(\$ 000)
Advertising					
	Advertising - CCT	Territory		98-99-00	3.0
<i>Sub-total Advertising</i>					<i>3.0</i>
Press relations					
	Press tours	Territory		98-99-00	2.5
<i>Sub-total Press relations</i>					<i>2.5</i>
<b>Total</b>					<b>5.5</b>
OPERATING ACTIVITIES					
Marketplaces					
	Canada Calls 1998	To be determined		98-99-00	1.0
<i>Sub-total Marketplaces</i>					<i>1.0</i>
<b>Total Operating activities</b>					<b>1.0</b>
TRANSFER					
PPC - Partners outside Québec					
	Tour Operators	Territory		98-99-00	5.0
<i>Sub-total PPC - Partners outside Québec</i>					<i>5.0</i>
<b>Total Transfer</b>					<b>5.0</b>
<b>Total New Zealand</b>					<b>11.5</b>

## APPENDIX 1

# TOURISM

## IN QUÉBEC

### Volume of tourists ('000)

Market of origin	1994	1995	1996	1997
<b>United States</b>	<b>1 810</b>	<b>1 946</b>	<b>1 920</b>	<b>1 868</b>
• New England	667	669	660	704
• Atlantic Centre	480	541	545	464
• Atlantic South	193	238	213	193
• Centre Northeast	223	222	219	197
• Pacific	1 056	128	112	103
<b>Other international markets</b>	<b>959</b>	<b>1 095</b>	<b>1 242</b>	<b>1 251</b>
• France	341	366	390	384
• United Kingdom	93	114	118	125
• Germany	58	78	107	86
• Japan	45	55	65	49
<b>Sub-total, international tourism</b>	<b>2 769</b>	<b>3 041</b>	<b>3 162</b>	<b>3 119 (1)</b>
Other provinces of Canada	2 423	2 371 (2)	2 441 (2)	2 515 (2)
Québec	14 879	14 681 (2)	15 107 (2)	15 545 (2)
<b>Total</b>	<b>20 071</b>	<b>20 093</b>	<b>20 710</b>	<b>21 179</b>

Source: Statistics Canada, Tourisme Québec.

(1) Estimate based on actual results for the first nine months of 1997 for international tourism.

(2) Estimate.

<b>Tourist spending</b> (\$ 000 000)				
Market of origin	1994	1995	1996	1997
<b>United States</b>	<b>708</b>	<b>762</b>	<b>853</b>	<b>776</b>
• New England	193	180	207	225
• Atlantic Centre	200	225	273	196
• Atlantic South	91	111	110	97
• Centre Northeast	93	96	128	94
• Pacific	55	68	60	56
<b>Other international markets</b>	<b>707</b>	<b>837</b>	<b>959</b>	<b>1 015</b>
• France	282	328	369	355
• United Kingdom	45	51	55	85
• Germany	33	47	65	64
• Japan	37	44	52	48
<b>Sub-total, international tourism</b>	<b>1 415</b>	<b>1 599</b>	<b>1 812</b>	<b>1 790 <sup>(1)</sup></b>
Other provinces of Canada	457	458 <sup>(2)</sup>	479 <sup>(2)</sup>	501 <sup>(2)</sup>
Québec	1 827	1 841 <sup>(2)</sup>	1 923 <sup>(2)</sup>	2 022 <sup>(2)</sup>
<b>Total <sup>(3)</sup></b>	<b>3 699</b>	<b>3 898</b>	<b>4 214</b>	<b>4 313</b>

Source: Statistics Canada, Tourisme Québec.

(1) Estimate based on actual results for the first nine months of 1997 for international tourism.

(2) Estimate.

(3) The total excludes spending by Quebecers in Québec for trips outside Québec, because the mission of Tourisme Québec is to promote tourism in Québec. Moreover, spending by visitors on excursions is not considered since it is not possible to break down by geographic market.

## APPENDIX 2

# THE PROGRAMME

## PUBLISHING PROGRAM

Product	Print run	Language	Target market
Vacances Québec/Vacationing in Québec/Ferien in Québec/Vacanze Québec/De Vacaciones in Québec (new edition)	400 000 550 000 30 000 30 000 25 000 20 000	French English German Italian Spanish Japanese	Québec, Canada, United States, Europe, Japan
Special events/Calendrier des manifestations (Summer, winter)	180 400 275 400	French English	Québec, Canada, United States, Europe, Japan
Accommodations in Québec/Hébergement Québec (2 booklets: Hotels and Tourist Residences / B&Bs, Vacation Centres, Youth Hostels and Educational Institution)	180 400 155 400	French English	Québec, Canada, United States, Europe
ACTA-Vacances Québec sales handbook	(winter) 500 (summer) 500	French	Québec
Québec Destination nature	n.d. 6 000 5 000	French English German	Europe United States
Flyers (reprint)	20 000 7 000 15 000	German Portuguese Dutch	Canada, United States, Europe, Japan
Fishing and Hunting Packages	64 800	English	United States, Ontario
Québec - It's Snow-Mo-Bliss/ Québec - Au pays de la motoneige (reprint)	15 500 40 000	French English	United States, Ontario
Snowmobiling (new video)	n.d.	French English	Multi-market
Meeting in Québec	7 500	English	United States, Ontario
Leaflet of what's new	500 300	French English	Québec, Canada, United States, Europe, Japan

Map of the Far North (reprint)	25 000 25 000	French English	General public multi-market
Toute la chaleur de l'hiver/ Warm Up Winter	55 000 25 000	French English	Europe, United States
Ski Québec booklet	20 000	English	United States, Europe
Getaway tours	n.d.	n.d.	General public multi-market
Theme tours	n.d.	n.d.	General public multi-market
Cross-country skiing booklet	n.d.	n.d.	United States, Europe, Canada
Aboriginal tourism booklet	n.d.	n.d.	Multi-market
Destination excellence	800 000 200 000	French English	Québec

## APPENDIX 3

## THE CANVASSING

## TEAM

City	Name	Telephone Fax E-mail	Target markets
New York	Alberto Marte (Accreditation)	(718) 657-1727 (718) 206-9114 pablomarte@msn.com	Atlantic Centre and part of Atlantic South north of North Carolina
	Roberta Horton (Conventions, incentive travel)	(212) 317 1711 (212) 317-1881 110354.500@compuserve.com	Atlantic Centre and part of Atlantic South north of North Carolina
Chicago	Marilyn O'Connor	(312) 726-4350 (312) 726-4581 Marilynoco@aol.com	Centre Northeast and Centre Northwest
Dallas	Sandy Mukitarian	(972) 414-7013 (972) 495-7660 110010.3060@compuserve.com	Centre Southwest, Centre Southeast 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
London	Josephine Wiggall- Lazarus	(011) 44-171 233-8011 (011) 44-171 233-7203 destquebec@aol.com	United Kingdom Netherlands Scandinavia

City	Name	Telephone Fax E-mail	Target markets
Düsseldorf	Martina Klöckner-Scherfeld	(011) 49-211-914-260 (011) 49-211-914-2614 DestinationQuebec@T-Online.de	Germany Austria Switzerland
Tokyo	Seiichi Iwabushi	(011) 81-35-379-6177 (011) 81-35-379-5517 mkonishi@msn.com	Japan
Toronto	Isabel Gil	(416) 977-6060 (416) 596-1407 isabel.gil@sympatico.ca	Canada Korea Taiwan
Montréal		(514) 873-7977 (514) 873-2762	
	Carole C. Gatien	gatien.carole@tourisme.gouv.qc.ca	Atlantic Canada New England
	Raynald Paquet	paquet.raynald@tourisme.gouv.qc.ca	Italy
	Michel Gagné	gagné.michel@tourisme.gouv.qc.ca	Spain Mexico and Brazil Australia New Zealand