

MARKETING PLAN

1999 • 2000

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Cover: Charles Lessard, graphic designer
Interior: Composition Orléans

Printing

Cover: Imprimerie Laurentide
Interior: Fonds de reprographie gouvernementale

Legal deposit –
Bibliothèque nationale du Québec, 1999
ISBN: 2-550-34517-7
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FOREWORD

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

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

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

Maxime Arseneau

Minister for Tourism

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PERFORMANCE

AND OUTLOOK

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

■ 1998: a very fruitful year

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

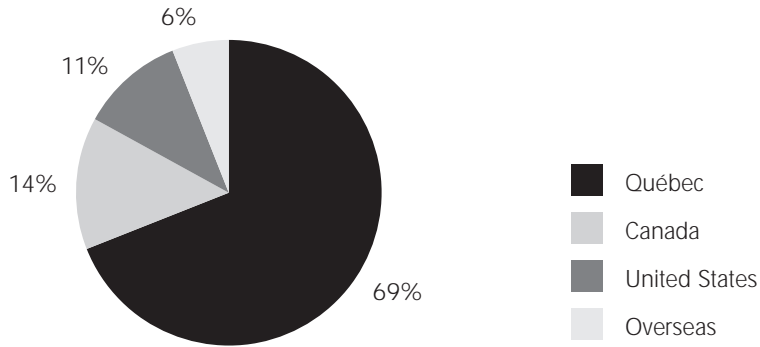
- For the first time since 1990, the number of American tourists visiting Québec has topped the 2 million mark. In fact, the increase in the number of American visitors to Québec in 1998 (8%) was the best of the decade. The same may be true for tourist spending, expected to increase by 16%. Apparently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

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

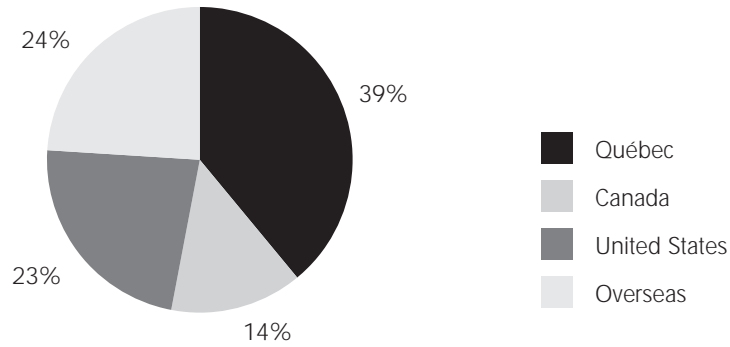
However, this growth tendency did not apply to international markets. In fact, after sustained growth from 1993 to 1996, these markets have remained stagnant since 1997, with clientele decreasing by 3% over the last two years. As far as Québec is concerned, this stagnation is a result of European markets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

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

Distribution of the 19 million tourists in 1998



Distribution of the \$4.2 billion in tourism revenue in 1998

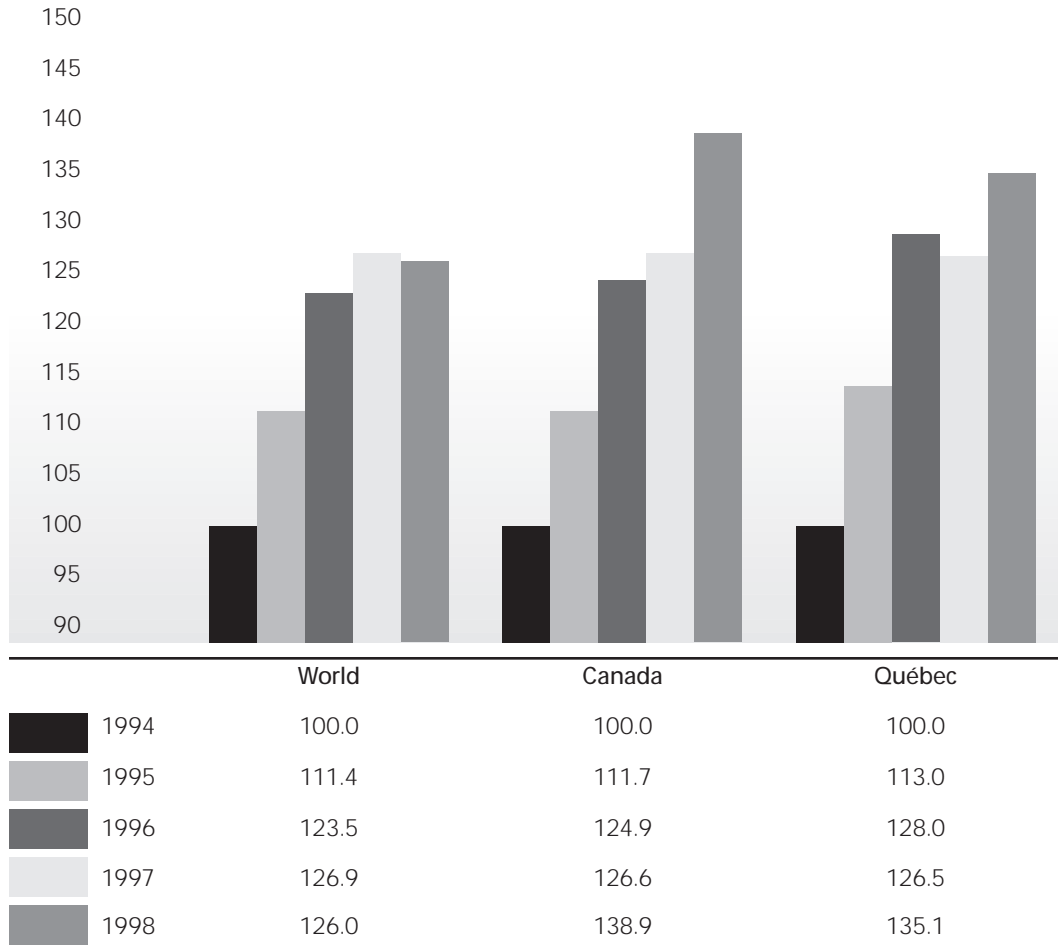


■ Québec is performing well compared to the competition.

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

Evolution of international tourism revenue

Indice



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

■ **1999: more moderate growth is predicted**

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

GUIDELINES

AND OBJECTIVES

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

2.1 GENERAL MARKETING GUIDELINES

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

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

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

2.2 GROWTH OBJECTIVES

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

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

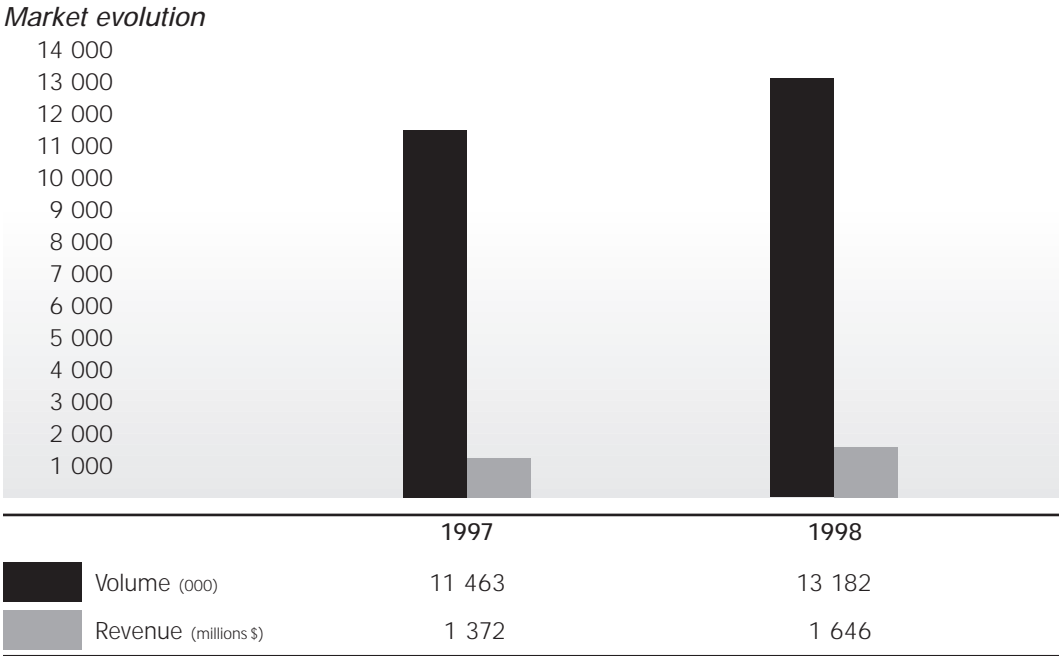
However, the new 2000-2005 tourism marketing strategy will probably lead to a re-evaluation of objectives next year.

MARKETS:

ANALYSIS AND STRATEGIES

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

3.1 THE QUÉBEC MARKET



■ A market in need of renewal

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

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

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

Strengths and opportunities

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

Challenges

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

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

■ Strategies and priorities for action

Objective

To renew interest in choosing destinations

Positioning

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

Target markets

Metro Montreal and Metro Québec

Target clientele

25-54 age bracket
Incomes of \$ 50,000 and over

Theme

“ Les vacances au Québec, c’est l’idéal ”
“ Québec, it’s just perfect ”

Marketing strategy

Advertising

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

Press relations

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

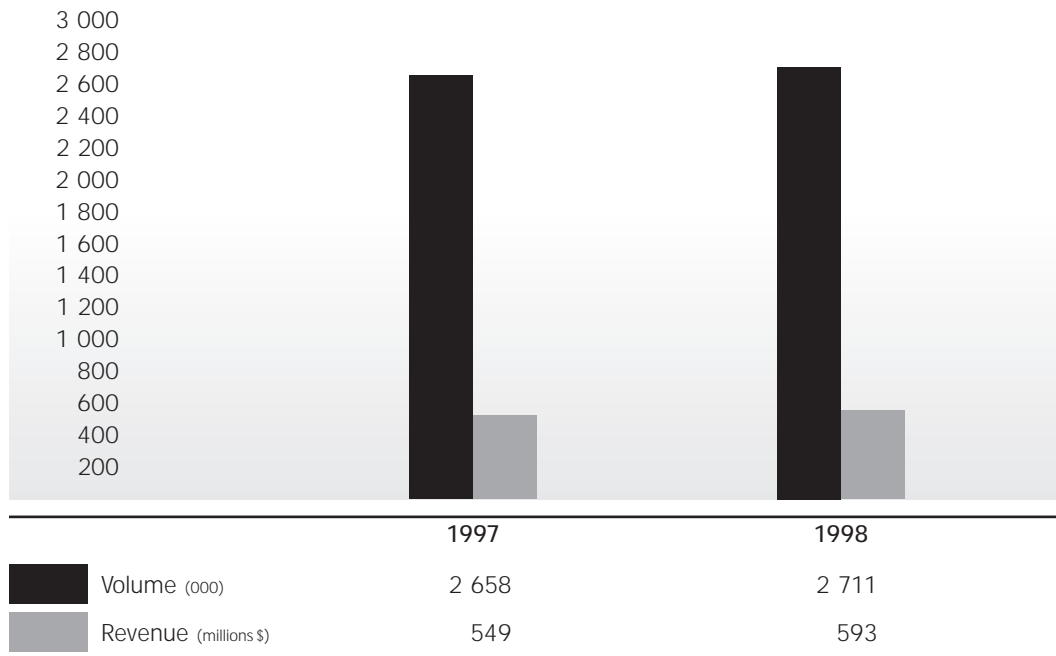
Distribution

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

3.2 THE NORTH AMERICAN MARKET

3.2.1 The Canadian Market

Market evolution



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

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

Strengths and opportunities

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

Challenges

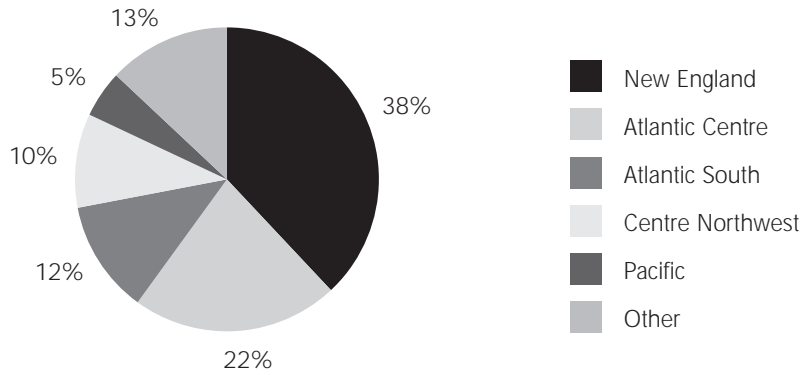
- Promotional investments by Tourisme Québec and the tourism industry on this market continue to be modest, particularly in advertising.
- Toronto and Vancouver are putting up strong competition for business decision-makers.
- More emphasis could be placed on promoting specific tourism products.
- Two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

■ **Strategies and priorities for action**

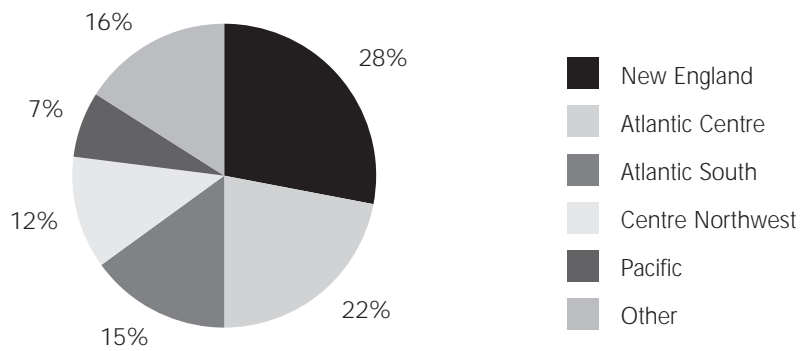
The marketing strategy for the Canadian market is the same as for the American market, since the North American promotional campaign targets both the Canadian and American markets. Some priorities for action that are more specific to the Canadian market will be described in this section on the American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

3.2.2 The American Market

Source of 2 million American tourists in 1998

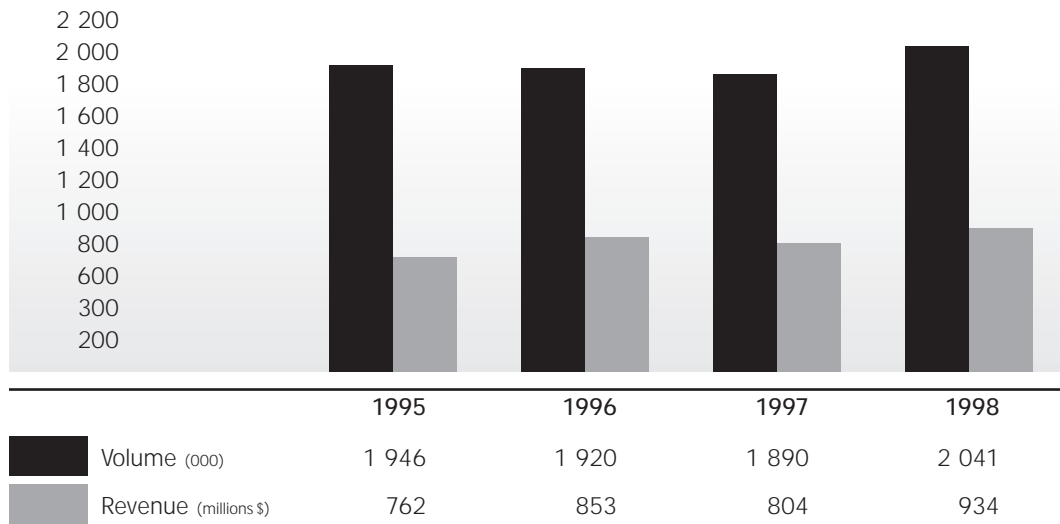


Source of \$934 M tourist dollars in 1998



■ A demanding market with enormous potential

Market evolution



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

Strengths and opportunities

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

Challenges

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

■ Strategies and Action Priorities

Objective

To target geographic markets to greater advantage

Positioning

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

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

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

Target markets

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

Target clientele

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

Theme

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

Marketing strategy

Publicity

The Tourisme Québec campaign will have two phases:

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

Means of communication used in this campaign:

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

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

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

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

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

Press relations

Canada

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

U.S.

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

Distribution

Canada

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

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

U.S.

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

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

Soliciting in market niches such as amateur gardeners and horticulturists.

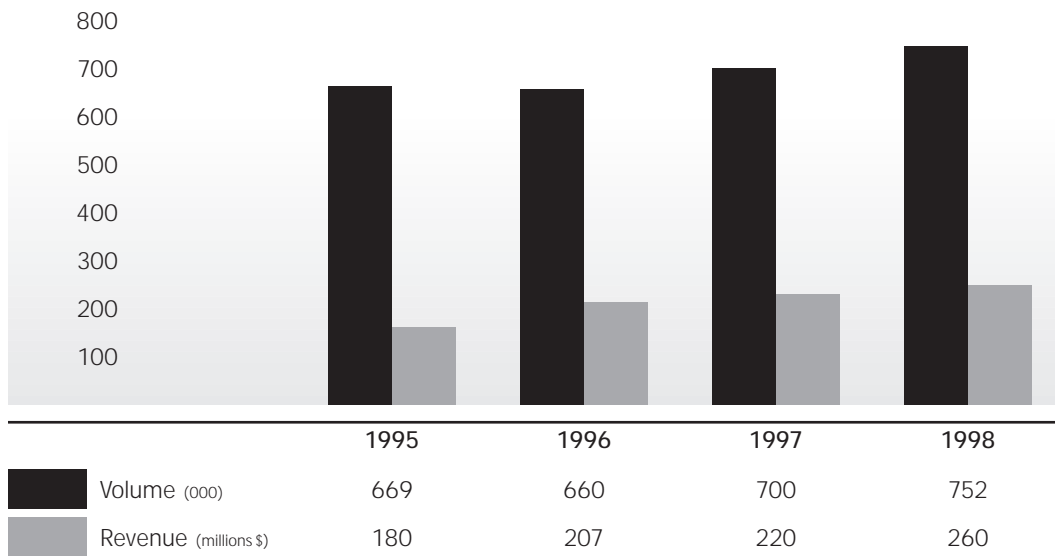
■ **Primary markets: in need of renewal**

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

NEW ENGLAND

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

Market evolution



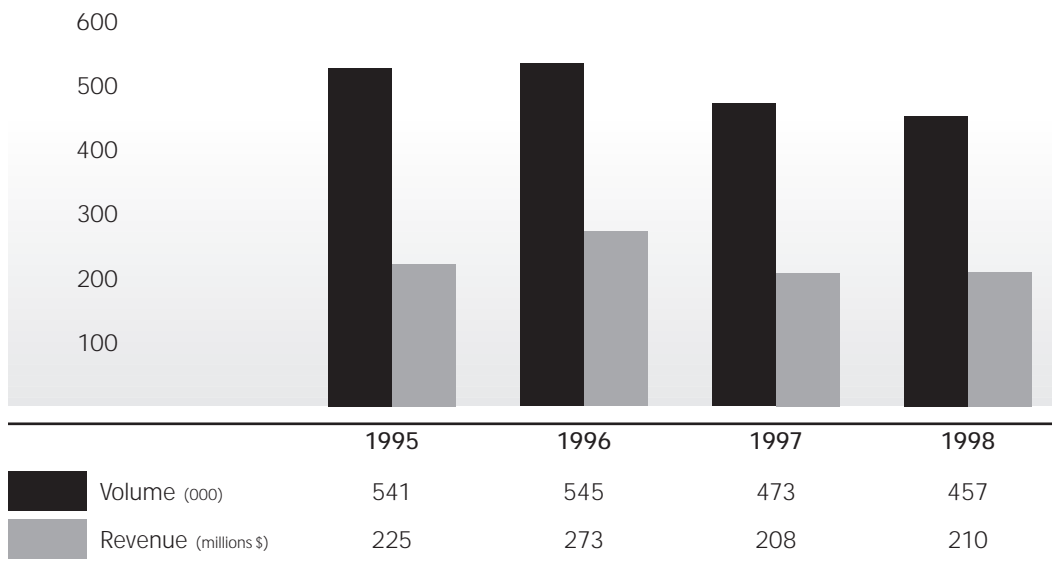
- The New England submarket has the potentially highest volume of visitors to Québec. It is the only region in the U.S. where more tourists visit Québec than Ontario. However, with a population of 13 million, it is the least populous region in the U.S.
- This traditional Québec market has performed well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

Priorities for action

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

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

Market evolution



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

Priorities for action

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

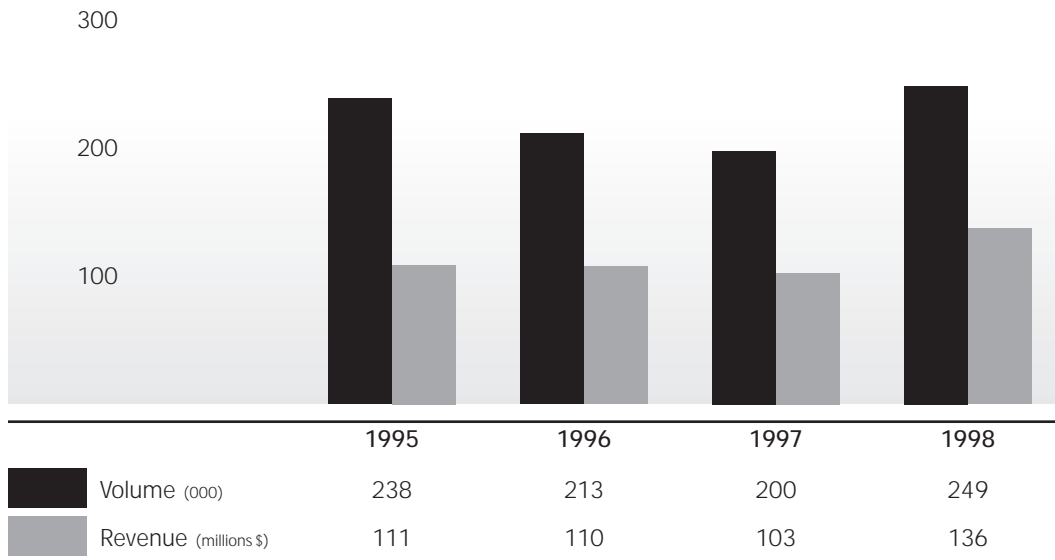
■ **Secondary markets: lucrative opportunities**

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

THE SOUTH ATLANTIC STATES

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

Market evolution



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

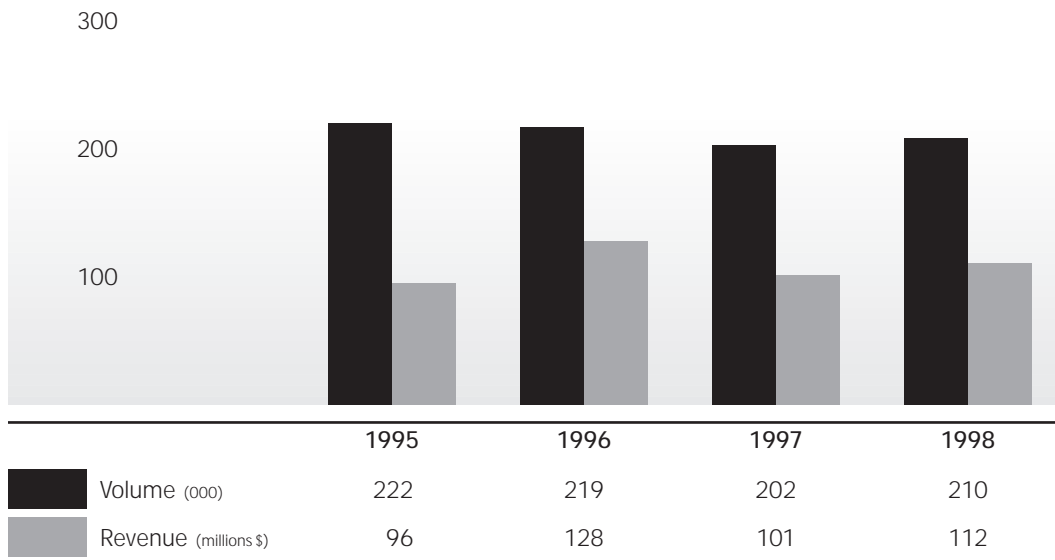
- Ontario is Québec's biggest competitor in this region: in 1996, it held 46% of the market in Canada compared to 16% for Québec.
- The CTRI forecasts that the number of tourists to Québec from this region will rise 6% in 1999, and that their spending will increase by 3%.

Priorities for action

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

THE NORTHEAST CENTRAL STATES
(Wisconsin, Michigan, Illinois, Indiana, Ohio)

Market evolution



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

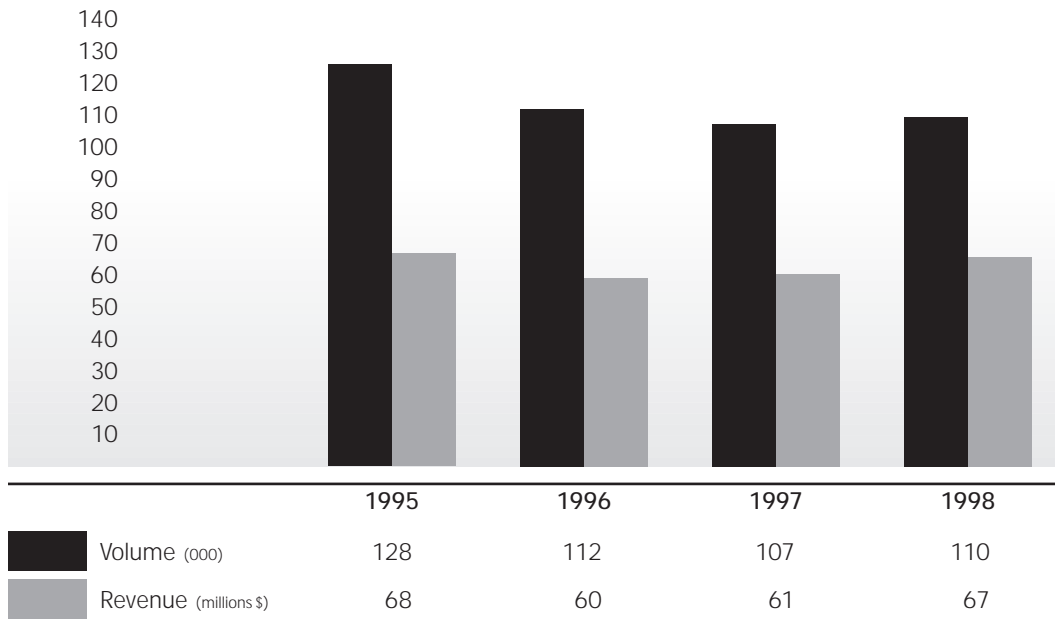
Priorities for action

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

PACIFIC STATES

(California, Oregon, Washington)

Market evolution



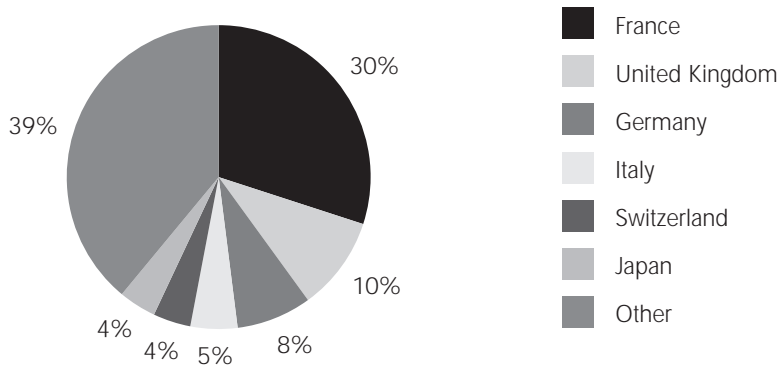
- There has been little change in the Pacific market over the last five years in terms of both volume and revenue.
- Québec's share of the Canadian market is 4% behind Ontario's (11%) and British Columbia's (69%).
- Compared to other Americans, people in this region show the highest propensity to travel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

Priorities for action

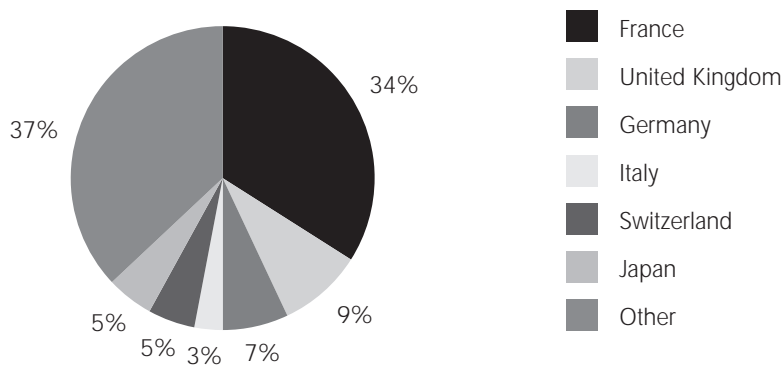
- Continue to work with Canadian partners (CCT, Air Canada, CP Hotels, etc.) to promote Québec.
- Television promotion: continue to work with our current partners (Travel Related Marketing, Associated Television International) and explore new projects in this field, both radio and TV.
- Continue direct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

3.3 OTHER PRIORITY INTERNATIONAL MARKETS

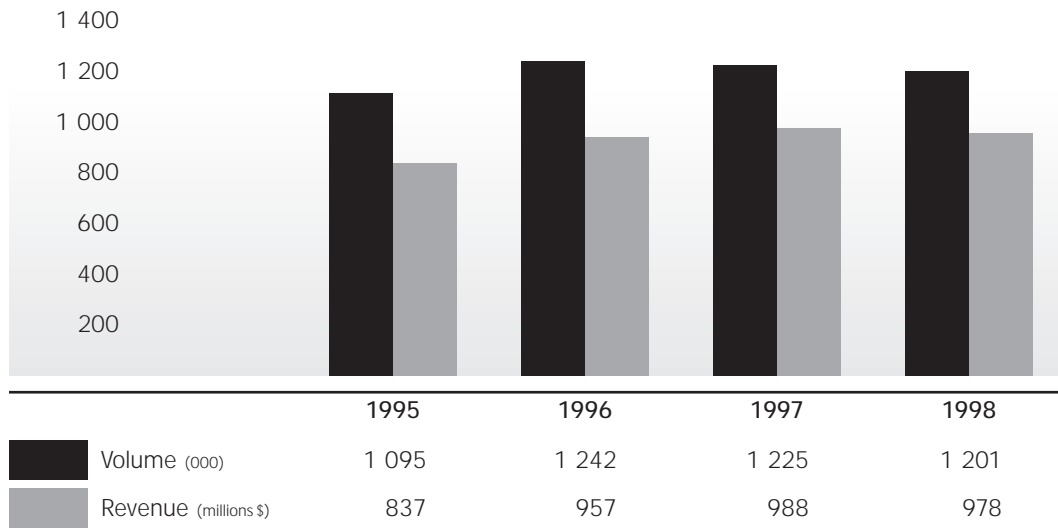
Distribution by country of the 1.2 million tourists in 1998



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



Market evolution

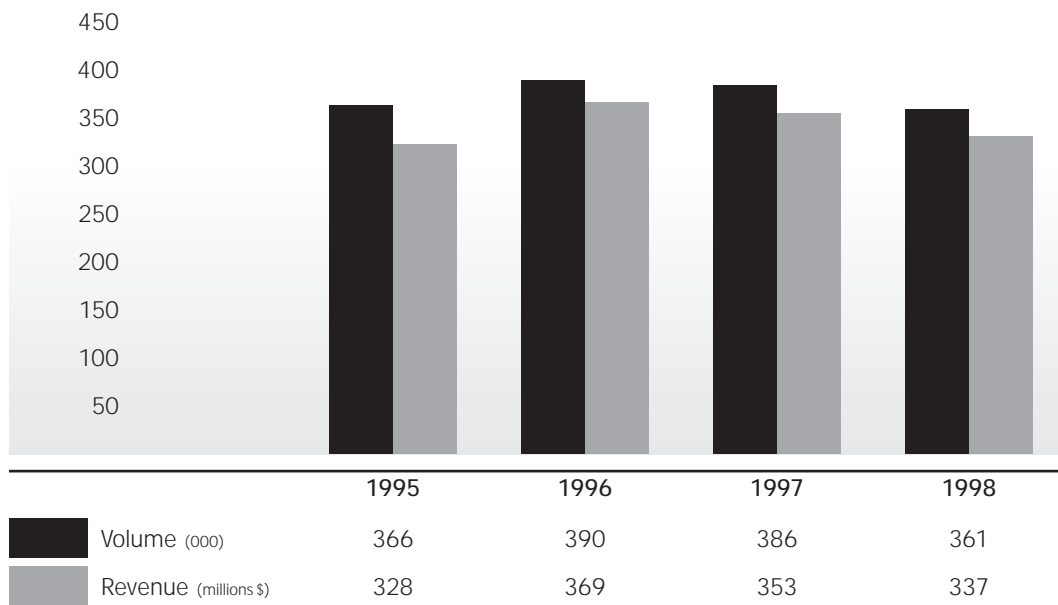


Other priority markets are the ones showing the most growth since 1992. However, since 1997 certain stagnation is evident in the number of tourists as well as tourist spending. For 1999, the CTRI is predicting renewed growth in these markets. A 2% rate of growth is expected in the number of tourists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

3.3.1 France

■ A tourism market reaching a ceiling

Market evolution



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

Strengths and opportunities

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

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

Challenges

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

■ Strategies and priorities for action

Objective

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

Positioning

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

Target markets

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

Target client groups

Consumers with significant disposable income

Consumers who travel in the off-season

Tour operators (pleasure tourism and incentive tours)

Distributors (travel agencies)

Theme

Summer: "**Le Québec, la fête grandeur nature**"

Winter: "**Le Québec, l'hiver à l'état pur**"

Marketing strategy

Advertising

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

Press relations

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

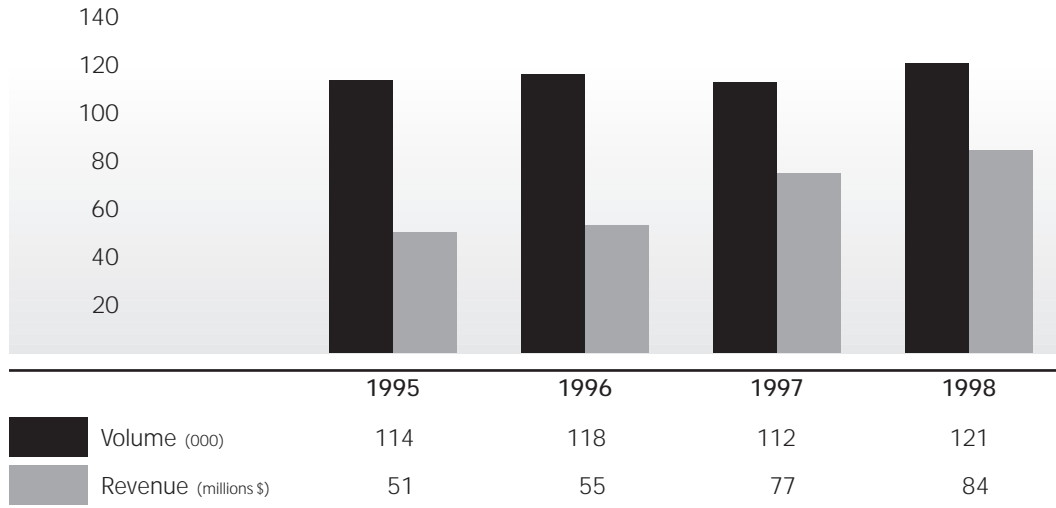
Distribution

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

3.3.2 The United Kingdom

■ A growing market

Market evolution



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

Strengths and opportunities

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

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

Challenges

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

■ Strategies and priorities for action

Objective

To consolidate market growth

Positioning

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

Target markets

Consumers who have visited Canada previously and prefer individual travel.

Families seeking a mid-range product.

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

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

A new product to develop: garden tours.

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

Incentive tour market.

Convention organizers.

Theme

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

Marketing strategy

Advertising

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

Press relations

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

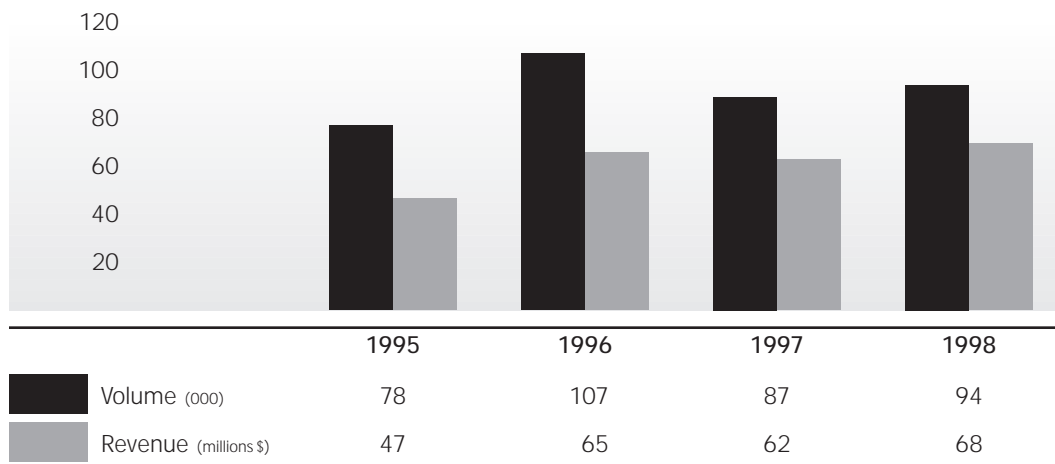
Canvassing

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

3.3.3 Germany

■ Impressive growth

Market evolution



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

Strengths and opportunities

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

Challenges

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

■ **Strategies and priorities for action**

Objective

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

Positioning

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

Target clientele

Consumers with high disposable income

Incentive travel market

Tour operators and travel agents

Theme

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

Marketing strategy

Advertising

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

Press relations

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

Canvassing

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

3.3.4 Italy

A stable market

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

Strengths and opportunities

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

Challenges

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

■ Strategies and priorities for action

Objective

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

Positioning

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

Target markets

Central and Northern Italy.

Target client groups

High income consumers

Tour operators and travel agents

Incentive travel organizers

Theme

To be determined

Marketing strategy

Advertising

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

Press relations

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

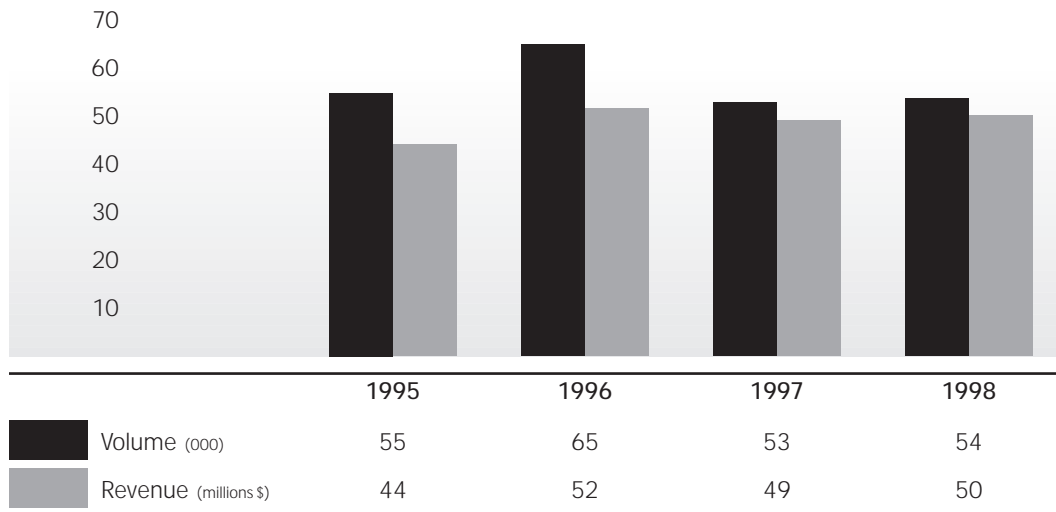
Distribution

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

3.3.5 Japan

■ A lucrative market

Market evolution



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

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

Strengths and opportunities

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

Challenges

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

■ **Strategies and priorities for action**

Objective

To generate interest among consumers in Québec as a destination.

Positioning

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

Target markets

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

Target client groups

High income aged 54 +.

Theme

“The passion of discovery”

Marketing strategy

Advertising

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

Press relations

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

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

Distribution

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

3.4 EMERGING MARKETS

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

3.4.1 Latin America

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

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

Strengths and opportunities

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

Challenges

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

■ Strategies and priorities for action

Objective

To raise Québec's profile

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

3.4.2 Pacific Rim Countries

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

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

Taiwan: the best short-term growth potential

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

Strengths and opportunities

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

Challenges

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

South Korea: high potential despite the more difficult context

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

Strengths and opportunities

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

Challenges

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

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Hong Kong: Gateway to China

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

Strengths and opportunities

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

Challenges

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

Australia and New Zealand: new frontiers

Strengths and opportunities

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

Challenges

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

■ **Strategies and priorities for action**

Objective

To raise Québec's profile

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

3.5 MULTI-MARKET PROMOTIONAL ACTIVITIES

3.5.1 Promotional Tools and Publications

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

The year's action priorities:

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

3.5.2 Tourist Information

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

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

For 1999-2000 the priorities for action are:

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

STRATEGIES

AND PRIORITIES FOR ACTION BY PRODUCT

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

■ Tour – City tourism

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

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

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

■ **Skiing**

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

■ **Resort tourism**

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

■ **Snowmobiling**

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

■ **Adventure**

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

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

■ **Hunting and fishing**

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

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OPPORTUNITIES

FOR THE INDUSTRY

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

5.1 SHOWS, MARKETPLACES AND FAIRS

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

Germany

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

Argentina

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

Australia

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

Belgium

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

Brazil

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

Canada

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

Spain

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

United States

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

France

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

Italy

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

Japan

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

Mexico

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

New Zealand

- Canada Calls, January 2000 (to be confirmed)

United Kingdom

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

Taiwan, Hong Kong, Singapore and South Korea

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

5.2 FINANCIAL SUPPORT FOR MARKETING

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

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

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

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

5.3 FINANCIAL SUPPORT FOR REGIONAL TOURIST ASSOCIATIONS

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

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

5.4 CANVASSING

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

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

Contact information for the canvassers is given in Appendix 3.

For more information on this subject, please contact:

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

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

5.5 TECHNICAL SUPPORT AND ADVICE

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

- Marketing tourist products

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

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

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

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

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

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

- Awareness of products and markets

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

5.6 JOINT PROMOTIONAL CAMPAIGNS

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

- The Agrément campaign on the Québec market

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

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

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

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

Partners may participate in:

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

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

5.7 PRESS RELATIONS

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

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

5.8 TOURIST INFORMATION

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

- By placing folders in display stands;

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

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

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

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

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

5.9 VIDEO LIBRARY

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

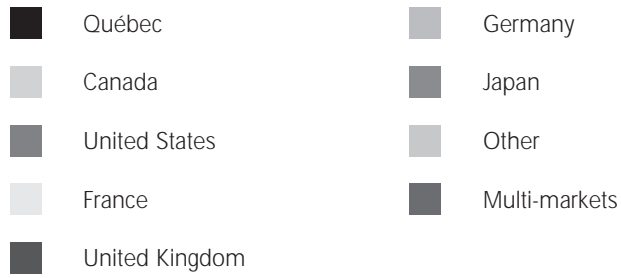
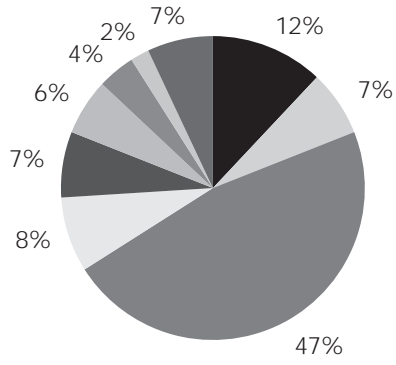
For rental, companies are asked to contact *Ramon Iturbe*, of Océan Production at (514) 284-2954. For additional information please contact *Pierre Boucher* of the Direction de la promotion (514) 864-1788.

BUDGET**BY MARKET**

(\$000, figures rounded off)

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

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



OPERATING PLAN

1999-2000

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

MONTREAL (cont'd)

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

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

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

OPERATING PLAN

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

TORONTO

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

OPERATING PLAN

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

UNITED-STATES

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

OPERATING PLAN

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

CHICAGO

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

OPERATING PLAN

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

DALLAS (cont'd)

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

OPERATING PLAN

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

LOS ANGELES

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

OPERATING PLAN

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

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

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

OPERATING PLAN

NEW YORK – PLEASURE

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

NEW YORK – PLEASURE (cont'd)

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

OPERATING PLAN

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

NEW ENGLAND (cont'd)

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

OPERATING PLAN

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

PARIS (cont'd)

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

OPERATING PLAN

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

LONDON

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

OPERATING PLAN

LONDON (cont'd)

| CATEGORY | ACTIVITY | CITY | PRODUCT | DATE | BUDGET (000 \$ CAN) |
|-----------------------|--|----------------------------------|---------|----------|---------------------|
| Seminars | | | | | |
| | ARTAC | Territory | All | 00-03-01 | 2.5 |
| | Canada Counselors | Territory | All | 99-04-01 | 5.0 |
| | Canada Seminars | Territory | All | 00-03-01 | 10.0 |
| | Canada Travel Specialists | | All | 99-06-01 | 2.5 |
| | CTC Nordics | To be determined, Scandinavia | All | 00-03-01 | 5.0 |
| | Tour operator educationals | London | All | 00-03-01 | 150.0 |
| | Visit USA and Canada Workshop | To be determined, Denmark | All | 00-03-01 | 3.0 |
| Total | Seminars | | | | 178.0 |
| Consumer shows | | | | | |
| | Destinations 2000 | London, United Kingdom | All | 00-02-01 | 10.0 |
| | Dublin Show | Dublin, Ireland | All | 00-01-01 | 5.0 |
| | Holiday Show | Belfast, United Kingdom | All | 00-02-01 | 2.5 |
| | Holiday Show | Glasgow, United Kingdom | All | 00-02-01 | 2.5 |
| | Holiday Show G-Mex | Manchester, United Kingdom | All | 00-01-01 | 9.0 |
| | Ski Show | London, United Kingdom | Skiing | 99-10-01 | 5.0 |
| | Vakantie | Netherlands | All | 00-01-01 | 4.0 |
| Total | Consumer shows | | | | 38.0 |
| Receptions | | | | | |
| | Canada Travel Awards | London, United Kingdom | All | 00-03-01 | 3.0 |
| | Céline Dion / or Gala Event | London, United Kingdom | All | 00-03-01 | 5.0 |
| | Cirque du Soleil | London, United Kingdom | All | 00-01-01 | 10.0 |
| | M & T Awards | London, United Kingdom | M & IT | 00-03-01 | 4.0 |
| | Ontario Québec Evening | London, United Kingdom | All | 00-03-01 | 4.0 |
| | Series of Co-Hosted/ Partner Media and Trade Functions | Territory | All | 00-03-01 | 5.0 |
| Total | Receptions | | | | 31.0 |

LONDON (cont'd)

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

OPERATING PLAN

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

VLOTHO (cont'd)

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

OPERATING PLAN

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

TOKYO (cont'd)

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

OPERATING PLAN

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

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

OPERATING PLAN

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

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

OPERATING PLAN

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

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

OPERATING PLAN

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

TOURISM

IN QUÉBEC

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

Source: Statistics Canada.

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

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

TOURIST SPENDING (\$000,000)

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

Source: Statistics Canada.

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

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

THE PUBLISHING PROGRAM

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

THE CANVASSING TEAM

| CITY | Name | Telephone Fax E-mail | Target markets |
|-------------|--|--|---|
| New York | Alberto Marte (Pleasure) | (718) 657-1727 (718) 206-9114 pablomarte@msn.com | Atlantic Centre and parts of Atlantic South north of North Carolina |
| | Roberta Horton (Conventions, incentive travel) | (212) 317 1711 (212) 317-1881 110354.500@compuserve.com | |
| Chicago | Under recruitment | | Centre Northeast and Centre Northwest |
| Dallas | Sandy Mukitarian | (972) 414-7013 (972) 495-7660 110010.3060@compuserve.com | Centre Southwest and part of Atlantic South, south of Virginia |
| Los Angeles | Fair Gordon | (310) 656-9611 (310) 656-9614 fairgordon@worldnet.att.net | Pacific and Mountain |
| Paris | Barbara di Stefano | (011) 33-1-44-77-87-80 (011) 33-1-44-77-87-81 dquebec@club-internet.fr | France Belgium |
| London | Jesephine Wiggall- Lazarus | (011) 44-171 233-8011 (011) 44-171 233-7203 destquebec@aol.com | United Kingdom Netherlands Scandinavia |
| Vlotho | Martina Klockner- Scherfeld | (011) 49-91480 (011) 49-914814 DestinationQuebec@T-Online.de | Germany Austria Switzerland |
| Tokyo | Seiichi Iwabushi | (011) 81-35-379-6177 (011) 81-35-379-6615 wcs@d1.dion.ne.jp | Japan |
| Toronto | Isabel Gil | (416) 977-6060 (416) 596-1407 isabel.gil@sympatico.ca | Canada Korea Taiwan |
| Montréal | Carole C. Gatien | (514) 864-2851 (514) 873-2762 gatien.carole@tourisme.gouv.qc.ca | Atlantic Canada New England |
| | Raynald Paquet | (514) 864-2734 (514) 873-2762 paquet.raynald@tourisme.gouv.qc.ca | |
| | Michel Gagné | (514) 864-3711 (514) 873-2762 gagne.michel@tourisme.gouv.qc.ca | Spain Mexico and Brazil Australia and New Zealand |