# Global Tourism Watch – Year 1

## Japan – Key Findings

Canadian Tourism Commission (CTC)

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# introduction

## Background

The shocks of 2001 and 2003 were strong reminders for the tourism industry regarding the speed of which consumer perceptions and decision-making processes can change based on a single event.

While there has not been a major shock to the tourism industry since 2004, a myriad of technological, social, environmental, and policy changes have occurred, affecting consumer perceptions, attitudes, motivations and travel intentions. Such changes include:

- Escalation of social media websites and their popularity across many age groups;
- Desire for healthier and more sustainable lifestyles;
- Climate change and related advocacy efforts by high-profile personalities; and
- Entry rules such as the Western Hemisphere Travel Initiative (WHTI).

To stay on top of and to adjust to the changes that are occurring, an annual research monitor was initiated to keep a pulse on consumer changes in CTC key markets.

## Objectives

In 2007, the Canadian Tourism Commission, in conjunction with a partnership group that included Ontario, British Columbia, Manitoba, the Atlantic and the North, engaged Harris/Decima to conduct the Global Tourism Watch (GTW) tracking research. The program was implemented in eight global markets – the US, Mexico, the UK, France, Germany, Australia, Japan, and South Korea.

The research objectives are to collect market intelligence (across all markets in a consistent way) related to four over-arching themes:

- Monitoring key performance indicators;
- Tracking response to Brand Canada;
- Identifying and tracking product opportunities; and
- Providing input into marketing activities and strategic plans.

## Methodology

The target population for the survey consisted of residents, aged 18 and older, who have taken a long-haul pleasure trip where they stayed at least one night in paid accommodations in the past three years or who plan to take such a trip in the next two years.  For all markets, pleasure trips included vacation or holiday trips, trips to visit friends and relatives, and combined business-pleasure trips.

A total of 1,527 Japanese respondents completed the online survey in November 2007.  A quota was set at n= 200.

The online survey sample was weighted by region, age, and gender to align it with the long-haul traveller population in each market based on data collected through a random telephone omnibus (n=2,000).

# what is the outlook for travel to canada and the regions in the next 2 years?

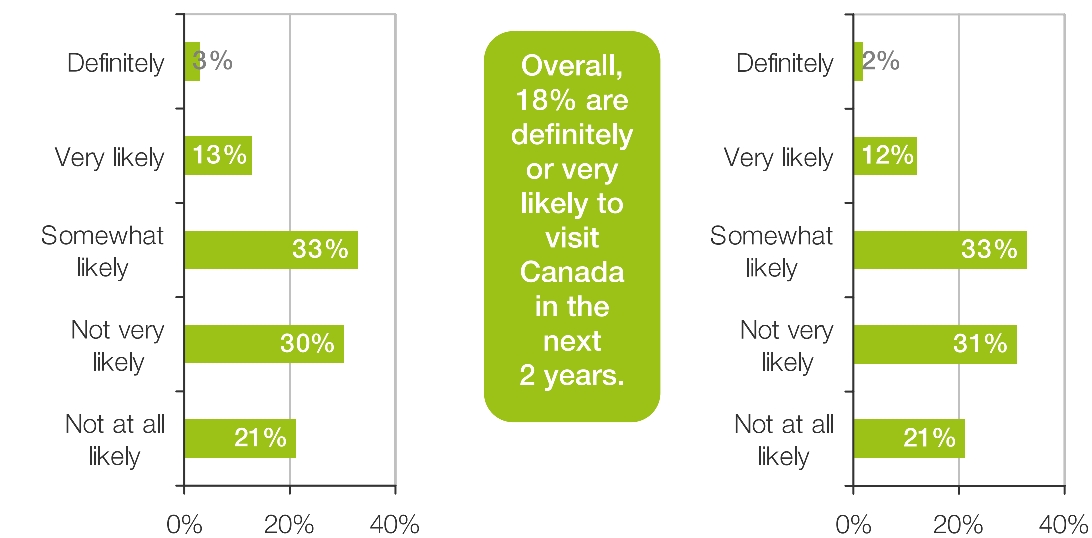
## Likelihood of Visiting Canada

The likelihood of visiting Canada in the next two years was assessed for both shorter stays of one to three nights and longer stays of four or more nights (see Exhibit 1). In total, only 18% of long-haul pleasure travellers in Japan say they will definitely or are very likely to visit Canada in the next two years.

**Exhibit 1: Likelihood of visiting Canada in the next 2 years**

**Likelihood of Taking a Trip of Four or More Nights (n=1,527)**

**Likelihood of Taking a Trip of One to Three Nights 1 (n=1,527)**




*Base: Long-haul pleasure travellers.*

*Note: 1Including trips to other countries (e.g. the US) that involve a stay of one to three nights in Canada.*

## Size of the Potential Market to Canada

Exhibit 2 provides an estimate of the size of the potential market for Canada in two ways. The target market is a broader estimate of the market size based on expressed interest among Japanese travellers, more specifically those very or somewhat interested in visiting Canada in the next two years. While interest in Canada is weak in comparison with other markets, the sheer size of the long-haul traveller population in Japan yields a relatively large target market of more than 12 million travellers.

The challenges of converting this market, however, are underscored by the relatively small size of the immediate market. This is a more conservative estimate of market size based on travellers who say they will definitely or are very likely to visit Canada in the next two years, and amounts to over 3.4 million travellers. While Japan ranks as the third largest target market for Canada (behind the US and the UK), when looking at immediate potential for conversion, it drops to sixth place.

**Exhibit 2: Size of the potential market to Canada (next 2 years)**

| | Size of Potential Market to Canada |
|---|---|
| Total potential long-haul pleasure travellers (aged 18 plus) | 19,070,000 |
| **Target Market for Canada** | |
| Very/somewhat interested in visiting Canada in the next 2 years | 66% |
| Size of the target market | 12,586,000 |
| **Potential Market for Canada** | |
| Will definitely/very likely visit Canada in the next 2 years | 18% |
| Size of the potential market | 3,433,000 |

*Base: Long-haul pleasure travellers (n=1,527)*

## Canadian Destinations Likely to Visit

Exhibit 3 shows that Ontario and British Columbia are the two regions that elicit the greatest interest from likely travellers to Canada, mentioned by 8 in 10 and 7 in 10, respectively. About 4 in 10 say they are likely to visit Alberta. There is some interest in the North (15%) and the Atlantic region (26%), particularly PEI and Newfoundland. However, Manitoba holds minimal appeal for this market (3%).

Symptomatic of the generally flagging interest in Canada, Japanese travellers are the least interested of any CTC market in Atlantic Canada and Manitoba, and have among the lowest interest in Ontario and the North. They are also far lower than the other Asia-Pacific markets in terms of interest in British Columbia (71%, vs. close to 90% in China, South Korea and Australia).

Among individual destinations, Niagara Falls (68%) draws the most attention from Japanese travellers, followed by Vancouver (61%) and Toronto (42%). The only other destination that appeals to at least a fifth of the market is Victoria. Most of the other destinations appeal to 10% or less of the market. However, it should be kept in mind that the Japanese market is a fairly large one, and even small percentages can translate into reasonable visitor numbers.

Japanese travellers again express weaker interest in most of the individual cities and sites in the exhibit. The only bright spot is Victoria (31%) where the ratings are fairly strong. In fact, Japan is one of the top three CTC markets in terms of market potential for this destination.

**Exhibit 3: Destination Interest and Market Potential for the Regions**

| | BC | MB | ON | ATL | North |
|---|---|---|---|---|---|
| Likely to visit region | 71% | 2% | 79% | 26% | 15% |
| Size of potential market for the regions* | 2,437,000 | 69,000 | 2,712,000 | 893,000 | 515000 |
| Most popular destinations within region | Vancouver (61%) | n/a | Niagara Falls (68%) | Charlottetown (10%) | NWT (11%) |
| | Victoria (31%) | | Toronto (42%) | St. John's NFLD (9%) | Yukon (11%) |
| | Whistler (11%) | | Ottawa (23%) | Other PEI (6%) | Nunavut (2%) |

** GTW partner regions.*

# what is japan's awareness of canada?

## Unaided Performance Indicators

The Global Tourism Watch measured three unaided (or top-of-mind) indicators[1] – unaided awareness of Canada, unaided awareness of Canadian travel advertising, and unaided destination consideration.

In terms of unaided destination awareness, Canada ranked fourth, with 17% of long-haul respondents mentioning Canada as a destination which comes to mind for a long-haul vacation.

For top-of-mind Canadian travel advertising, Canada ranked 5th, with 8% of long-haul respondents mentioning that they had seen or heard Canadian advertising relating to travel or holidays within three months of the survey.

Regarding unaided destination consideration, Canada ranked 4th, with 9% of long-haul respondents mentioning that they are seriously considering Canada and Canadian destinations for their holiday trips in the next 2 years.

1 All results include Canadian sub-destinations.

# what do recent and potential japanese visitors look like?

## Target Market for Canada

Exhibit 4 provides demographic profiles recent travellers to Canada and travellers interested in visiting Canada. The Japanese population is aging faster than any other wealthy nation, and the "silver segment" has doubled over the last 15 years. By 2015, it is expected that fully a quarter of the population will be over the age of 65. Despite their older age, few in this market are retired (under 7%), although this is set to increase in the near-term as Japan's baby-boomers near retirement age.

Potential travellers to Canada are well-educated and well-off. About 6 in 10 have university educations, and almost half (48%) have annual household incomes of 8 million yen (approximately $80,000 CDN) or more. Just 25% have children in the household, which is one of the lowest levels across the eight CTC markets surveyed. This reflects both the advanced age of the market and the very low birth rate in Japan.

Interestingly, actual travellers to Canada are much more likely to be younger (42% are under 35), female (over 60%) and higher income (half earn 8 million yen or more) than the market overall. Approximately 27% are single, which is fairly high compared with other markets. Taken together, this may indicate that Canada is capturing some attention from the "Office Lady" segment. This segment of female office workers, living at home with their parents into their mid 30s, was a booming travel segment in Japan a decade ago, but is currently in decline due to shifting priorities.

Over a third of recent visitors to Canada have friends or family there. While this is higher than the travelling population at large, it is fairly low compared with other CTC markets studied.

## Target Market for Canada's Regions

Exhibit 5 shows the demographic profile of travellers who are likely to visit Canada (or are considering a trip there) in the near-term, as well as those who plan to visit each of the regions (only GTW regional partners are included). The profiles for British Columbia and Ontario are based on those who say they are most likely to visit the region, while the profiles for Manitoba, the Atlantic and the North are based on those who express an interest in visiting these regions, given the relatively low proportion of travellers who say they are most likely to do so.

Across the regions, there are very few meaningful significant differences (partly due to the small sample sizes). Notably, however:

Those in British Columbia are more likely to have friends and relatives living in Canada, which likely reflects the fact that Canada's Japanese population is concentrated in this province.

Travellers interested in the Atlantic region are more likely to be women over the age of 55, which may reflect awareness of the Anne of Green Gables attraction among Japanese women.

**Exhibit 4: Target market demographics for Canada**

| Gender | Recent Travellers to Canada (n=201) | Interested in Canada (n=292) |
|---|---|---|
| Female | 61% | 51% |
| **Age** | | |
| 18 to 24 | 5% | 7% |
| 25 to 34 | 37% | 27% |
| 35 to 44 | 18% | 19% |
| 45 to 54 | 9% | 13% |
| 55 or older | 32% | 34% |
| **Close Friends or Relatives Living in Canada** | | |
| Yes | 34% | 22% |
| **Have Children in Household Under 18** | | |
| Yes | 24% | 25% |
| **Marital Status** | | |
| Married / partnered | 66% | 68% |
| Single / never married | 27% | 30% |
| Other (e.g. separated, divorced, widowed) | 7% | 1% |
| **Education** | | |
| High school or less | 24% | 21% |
| Technical / vocational | 13% | 17% |
| Completed college / university | 62% | 62% |
| **Employment Status** | | |
| Employed full-time / part-time | 63% | 60% |
| Housewife / homemaker | 24% | 22% |
| Retired / unemployed | 5% | 5% |
| Student | 6% | 7% |
| **Occupation** | | |
| White-collar worker | 56% | 56% |
| Administrator / Manager | 3% | 4% |
| Blue-collar worker | 7% | 6% |
| Self-employed | 9% | 11% |
| Specialist / freelancer | 11% | 12% |
| Other | 14% | 11% |
| **Average Annual Household Income** | | |
| Less than 4 million yen | 18% | 15% |
| 4 million to 4.9 million yen | 6% | 11% |
| 5 million to 7.9 million yen | 25% | 25% |
| 8 million to 9.9 million yen | 23% | 20% |
| 10 million to 14.9 million yen | 19% | 22% |
| 15 million or more yen | 8% | 6% |

**Exhibit 5: Target market for Canada's regions**

| | TOTAL (n=728)[1] | BC[3] (n=209) | MB[2] (n=20)4 | ON[3] (n=346) | ATL[2] (n=179) | North2 (n=104) |
|---|---|---|---|---|---|---|
| **Gender** | | | | | | |
| Female | 44% | 43% | 34% | 48% | 55% | 44% |
| **Age** | | | | | | |
| 18 to 24 | 5% | 6% | 3% | 4% | 4% | 5% |
| 25 to 34 | 22% | 27% | 34% | 24% | 21% | 15% |
| 35 to 44 | 15% | 17% | 14% | 14% | 10% | 15% |
| 45 to 54 | 12% | 13% | 14% | 13% | 10% | 10% |
| 55 or older | 45% | 37% | 34% | 45% | 54% | 54% |
| **Close Friends or Relatives Living in Canada** | | | | | | |
| Yes | 14% | 20% | 30% | 11% | 16% | 17% |
| **Have Children in Household Under 18** | | | | | | |
| Yes | 22% | 28% | 27% | 22% | 14% | 19% |
| **Marital Status** | | | | | | |
| Married / partnered | 69% | 70% | 76% | 69% | 65% | 79% |
| Single / never married | 26% | 27% | 24% | 27% | 28% | 18% |
| Other | 5% | 3% | 0% | 5% | 7% | 3% |
| **Education** | | | | | | |
| High school or less | 21% | 19% | 0% | 25% | 21% | 23% |
| Technical / vocational | 18% | 14% | 7% | 21% | 18% | 11% |
| Completed college / university | 61% | 68% | 93% | 54% | 61% | 66% |
| **Employment Status** | | | | | | |
| Employed full-time / part-time | 66% | 63% | 81% | 68% | 58% | 63% |
| Housewife / homemaker | 19% | 18% | 14% | 18% | 25% | 22% |
| Retired / unemployed | 9% | 11% | 0% | 6% | 8% | 4% |
| Student | 5% | 4% | 4% | 5% | 6% | 4% |
| **Occupation** | | | | | | |
| White-collar worker | 54% | 53% | 55% | 56% | 49% | 64% |
| Administrator / Manager | 3% | 3% | 16% | 3% | 2% | 2% |
| Blue-collar worker | 5% | 4% | 0% | 8% | 1% | 1% |
| Self-employed | 11% | 11% | 12% | 11% | 14% | 10% |
| Specialist / freelancer | 13% | 15% | 16% | 11% | 15% | 8% |
| Other | 14% | 14% | 0% | 11% | 18% | 15% |
| **Average Annual Household Income** | | | | | | |
| Less than 4 million yen | 14% | 13% | 7% | 15% | 18% | 11% |
| 4 million to 4.9 million yen | 12% | 14% | 3% | 10% | 13% | 13% |
| 5 million to 7.9 million yen | 30% | 27% | 13% | 34% | 23% | 35% |
| 8 million to 9.9 million yen | 16% | 15% | 21% | 17% | 19% | 12% |
| 10 million to 14.9 million yen | 20% | 23% | 23% | 19% | 20% | 21% |
| 15 million or more yen | 8% | 9% | 33% | 6% | 8% | 8% |

*Notes:*

*[1] Those likely to visit Canada in the next 2 years and/or those who are considering, have decided to visit or have booked a trip there.*

*[2] Those likely to visit the region.*

*[3] Those most likely to visit the region.*

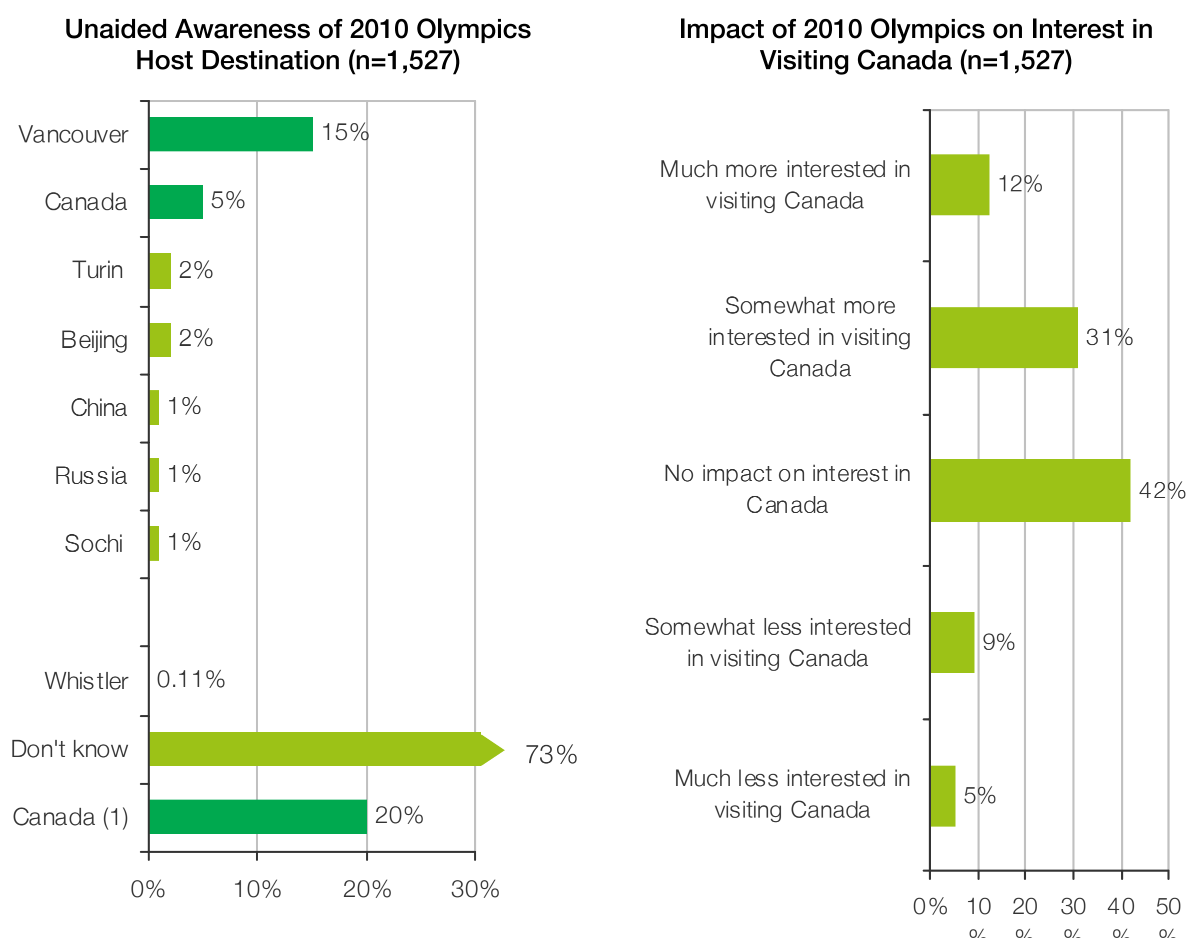
*[4] Results should be interpreted with caution due to the small sample size.*

# what is the impact of the 2010 Olympic Games on travel to canada?

Exhibit 6 shows that, in total, 20% correctly identify Canada as the host of the 2010 Winter Olympic and Paralympic Games, with "Vancouver" accounting for the lion's share of those mentions.  As a baseline, awareness levels are fairly high and will doubtlessly increase over time, especially following the 2008 Summer Olympics in China.

Over 40% say that hosting the Olympics has enhanced their desire to visit Canada, which is lower than in the other Asian markets, but still a very solid result at such an early date. As in other markets, the Olympics will present Canada with a golden opportunity to enhance its profile and image in Japan.

**Exhibit 6: Impact of 2010 Winter Olympics on general interest in Canada**




*Base: Long-haul pleasure travellers.*

*Note: (1) Includes all mentions of Canada, Vancouver and Whistler.*

# what are canada's product strengths and weaknesses?

## Canada's Product Strengths and Weaknesses

Exhibit 7 presents a product strengths and weaknesses map for Canada in Japan which looks at impressions of Canada's product offerings vs. the importance of these products to Japanese travellers on their long-haul trips. The purpose is to identify products of importance to the Japanese market where Canada is either favourably or unfavourably perceived.

**General product strengths** for Canada are products that are both important in the minds of travellers in planning their long-haul trips and for which Canada is favourably viewed. As expected, nature is Canada's key product strength, including beautiful landscapes, rivers/waterfalls, and national parks/heritage sites.

**Niche product strengths** appeal to smaller groups of travellers and represent potential niche markets to be developed or targeted. For Japan, these include a number of outdoor activities. As in other markets studied, skiing is Canada's strongest niche, but fishing/hunting, hiking/trekking, and canoeing/kayaking also emerge as niche strengths.

Canada is also viewed as a relatively good place to view wildlife, although this just edges in as a strength, indicating room to improve perceptions of this product. This is the case in most of the GTW CTC's markets. However, Japan is the only market where wildlife is a niche strength for Canada rather than a general one, again emphasizing a generally weaker interest in seeing wildlife as part of a vacation trip.

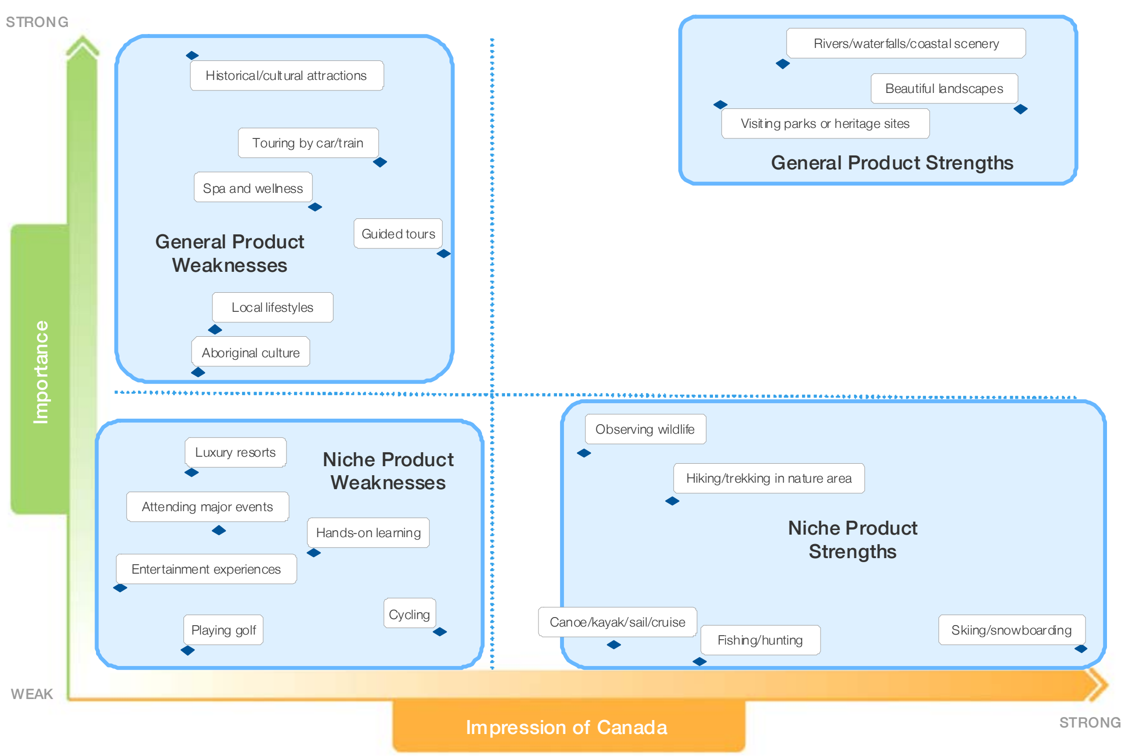
**General product weaknesses** are products that are important to travellers, but for which Canada is not favourably rated, pointing to possible issues (perceptual or actual) to be mitigated. Beyond Canada's nature offerings, all other general product interests, including cultural products, touring and spa/wellness, are viewed as weaknesses for Canada. Clearly, Canada needs to do more to communicate the diversity and quality of its product offerings in Japan, with special emphasis on cultural products, as this would help to round out and balance the various components of Brand Canada. Within the cultural sphere, the focus should be on promoting the country's world-class historical and cultural attractions, as this is the number one activity preference for Japanese travellers.

The CTC and its regional partners should consider opportunities to leverage Canada's natural and geographical strengths to showcase other products such as scenic drives, rail tours, and spas/hot springs. Stronger promotion of guided tours, especially combined nature-culture or nature-urban itineraries, may also help to boost impressions of Canada's diversity and highlight offerings that are not presently associated with the Canadian travel experience.

**Niche marketing weaknesses** are unfavourably rated activities that appeal to smaller groups of travellers. As such, a considerable investment may be required to improve product perceptions for a lower return.

Again, the number and variety of Canada's niche weaknesses (e.g., luxury products, entertainment, learning, leisure activities) indicate that Japanese travellers currently have a one-dimensional view of Canada that is largely limited to nature and the outdoors.  With 12 products classified as weaknesses (both general and niche), Japanese are more critical of Canada's products than other GTW CTC markets are, which suggests that product knowledge of Canada is fairly low and needs to be enhanced.

**Exhibit 7: Product strengths and weaknesses map**




## Top-Rated Products for Canada

Harris/Decima conducted a competitive exercise that asked respondents to select the best places to visit for a variety of travel products from amongst seven long-haul destinations (Canada, Germany, Australia, Mainland US, Hawaii, New Zealand and Thailand).

It comes as no surprise that Canada is viewed as the premier destination for nature and the outdoors.  All nature offerings are on the list, including landscapes, rivers/waterfalls, parks/heritage sites and wildlife.  Most outdoor activities are also on the list, with skiing particularly well-rated.

# what are japanese views on environmentally-friendly travel products?

Prompted by growing public awareness of the environmental impact of travel and an increasing focus on responsible tourism in many countries, the GTW survey examined the attitudes of travellers towards eco-friendly tourism and travel products.

Survey results shows that over 8 in 10 Japanese travellers feel that environmentally-friendly travel is important, but relatively few (about 4 in 10) say that this plays a role in their travel decisions and choices. With so few putting their eco-friendly views into practice, there is likely little benefit to Canada in the fact that almost two-thirds of the market view Canada as an environmentally-friendly destination. Those interested in travelling to Canada are more likely to lay claim to eco-friendly views and behaviours, but even here the results are not particularly strong.

**Exhibit 8: Willingness to Pay a Premium for Environmentally-Friendly Travel Products**

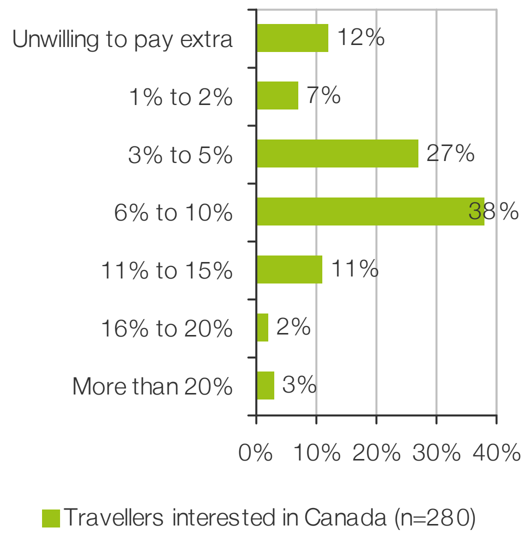



Exhibit 8 shows that 88% of travellers interested in Canada say that they are willing to pay a premium for environmentally-friendly travel products, most commonly between 3% and 10%.

# how is canada perceived?

## Unaided Brand Personality Perceptions

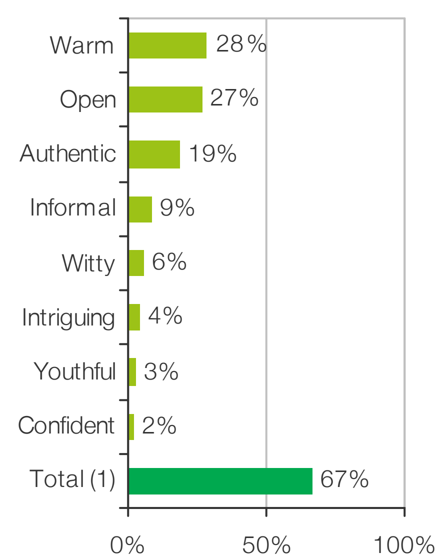
Brand personality often serves as a good metaphor for understanding travellers' perceptions of a destination. As such, respondents were asked to indicate three personality traits or characteristics that come to mind when they think of Canada as a person. The responses were coded into a number of personality dimensions, each comprised of a group of related personality traits. These included the eight dimensions encompassed by Brand Canada: Authentic, Confident, Informal, Intriguing, Open, Warm, Witty and Youthful, as defined by the CTC.

As shown in Exhibit 9, the personality dimension that Japanese travellers associate most closely with Canada is Warm (28%), which the CTC defines as friendly, hospitable, welcoming, warm-hearted, kind, etc. About equal numbers (27%) describe Canada as Open (e.g., accepting, liberal, open-minded, flexible, accessible), which is exceptionally high compared to other GTW markets. Just under 1 in 5 describe Canada as Authentic (e.g., genuine, sincere, honest, down-to-earth, trustworthy), which echoes the brand image results, and is also the highest score of any market on this characteristic. The intensity of mentions for these particular traits reveals a Japanese view of Canada as welcoming, accepting and real.

With Informal (e.g., casual, relaxed, easy-going, laid-back, approachable) as the next most widely associated trait (9%), a clear-cut picture of Canada's brand personality begins to emerge. This personality is more mild-mannered than exciting, and in keeping with Canada's traditional image. In fact, all of the more extroverted and edgy personality traits receive relatively low levels of agreement (e.g., between 2% and 6%), including:

- Witty (e.g., humorous, quick, entertaining, clever, bright, intelligent);
- Intriguing (e.g., fascinating, interesting, exciting, appealing, engaging);
- Youthful (e.g., energetic, lively, young at heart, vigorous, fun, vibrant, peppy); and
- Confident (e.g., self-assured, sure, secure, poised, positive).

**Exhibit 9: Unaided brand personality perceptions**




*Base: Long-haul pleasure travellers (n=1,527).*

*Note: (1) Percent who mentioned any of the 8 Brand Canada personality traits (or synonyms thereof).*

In total, 67% of the market mentioned at least one Brand Canada personality trait on an unaided basis, which is the second highest of any market. Unfortunately, most of this is driven by perceptions of Canada as warm, open and authentic, which are largely carry-overs from the old brand. Canada may want to present a more well-rounded brand personality to Japanese travellers to hone interest and lend more excitement to the country's image.

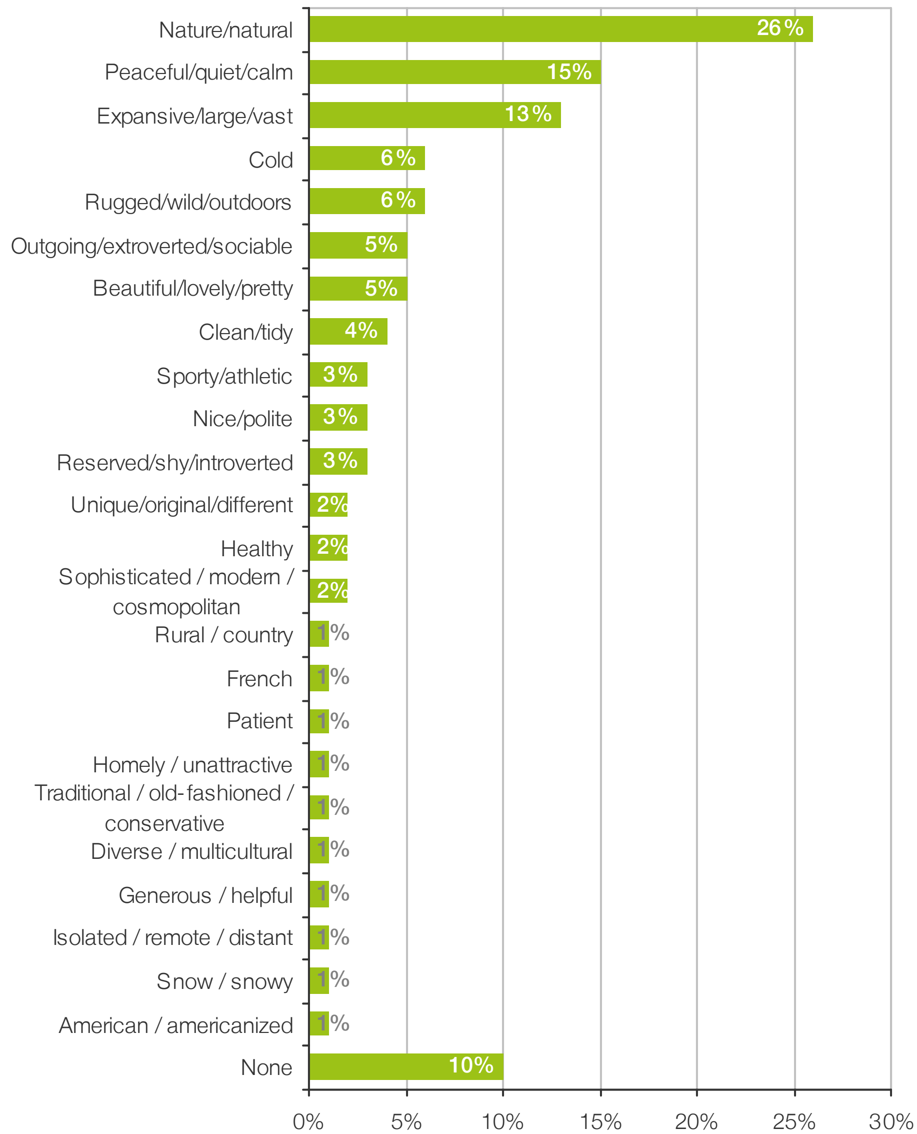
Exhibit 10 shows other personality traits that are associated with Canada by Japanese travellers and indicates that Canada's traditional image is still very much in evidence here. There is clearly a strong association with nature, seen not only in direct mentions of "nature/natural" (26%), but in other nature-related references, like "expansive/large/vast" (13%), "rugged/wild/outdoors" (6%) and "beautiful/lovely/pretty" (5%). References to "cold" (6%) and "snow/snowy" (1%), while specific in themselves, also add to the nature imagery, as do mentions of "rural/country" (1%) and "isolated/remote" (1%).

Mentions of "sporty/athletic" (3%) and healthy (2%) are no doubt tied to perceptions of Canada as a place for outdoor activities, exercise, clean air, etc, with the cleanliness aspect further emphasized by mentions of "clean/tidy" (4%).

The mild-mannered and laid-back personality traits associated with Canada's traditional image also emerge quite prominently through references to "peaceful/quiet/calm" (15%), "nice/polite" (3%), "reserved/shy/introverted" (3%), "patient" (1%), "traditional/old fashioned/conservative" (1%) and "generous/helpful" (1%). Again, this paints the picture of Canada as a nice place to visit, but not terribly exciting or engaging.

Reassuringly, there are also some references that indicate progress on the new brand traits, including "outgoing/extroverted/sociable (5%), "unique/original/different" (2%), "sophisticated/ modern/cosmopolitan" (2%) and "diverse/multicultural" (1%).

**Exhibit 10: Unaided brand personality perceptions– other mentions**




*Base: Long-haul pleasure travellers (n=1,527).*

## Value Perceptions

Destination success cannot be measured only by the degree to which the brand has established itself in the marketplace. Even if brand awareness is high, it is important for a destination or brand to be perceived as offering value to travellers. For a destination to have value, it should:

- Have an inherent desirability or appeal;
- Offer high quality experiences and travel products;
- Be relevant to travellers, with the experiences they are specifically looking for; and
- Offer a unique product relative to other destinations.

To assess value perceptions of Canada in Japan, respondents were asked to rate the country on four value-related statements that embody each of the above criteria.

Exhibit 11 shows that Canada performs best on the relevance dimension, at 61%, which is a fairly healthy score, compared to that other eight CTC markets studied. While uniqueness ranks second, the absolute rating of 57% is fairly low relative to the other markets, suggesting that Canada needs to do a better job at communicating the distinctive features of the country and the Canadian travel experience in this market. Performance on quality is about average, with just under half (49%) of Japanese travellers who rate Canada positively on this measure.

Where Canada fares the worst is with respect to desirability, as only 4 in 10 feel that Canada is a dream destination. This is substantially lower than in most other markets, with only Americans rating Canada more poorly here. While it is understandable that Americans do not view their next door neighbour as exotic or exciting, its lack of desirability in Japan is an issue that needs to be delved into further.

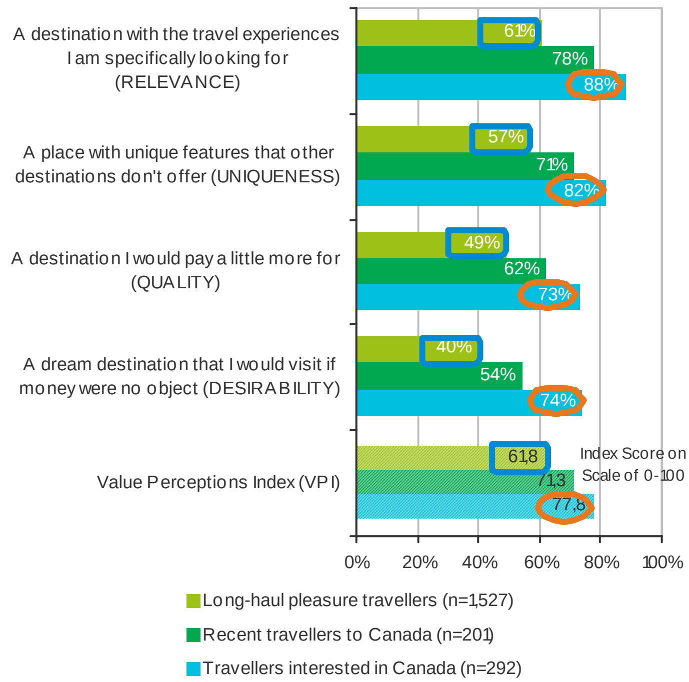
On a more positive note, both recent visitors to Canada and those interested in visiting in the future have a much better appreciation of the value of the Canadian travel experience, giving vastly higher ratings across the board. The ratings of potential visitors are particularly strong (i.e., well over 70% on all measures. Among Canada's target market, at least, perceptions of Canada's value are strong.

## Price Perceptions

In addition to brand image and destination value, cost obviously plays a major role when it comes to destination decision-making. Exhibit 12 shows how Canada is perceived by Japanese travellers on various travel cost components.

A weak majority of Japanese travellers feel that Canada offers value for their vacation dollar at 60%. Ratings on all other aspects of price are even lower, ranging from 35% for food and entertainment down to just 23% for affordability by air. The poor image, value and price perceptions of Canada, taken in combination with the external environment in Japan, the current trend for closer destinations, and the low awareness of and interest in visiting Canada, suggest that Japanese arrivals to Canada are unlikely to recover their former strength anytime soon.

## Exhibit 11: Value perceptions



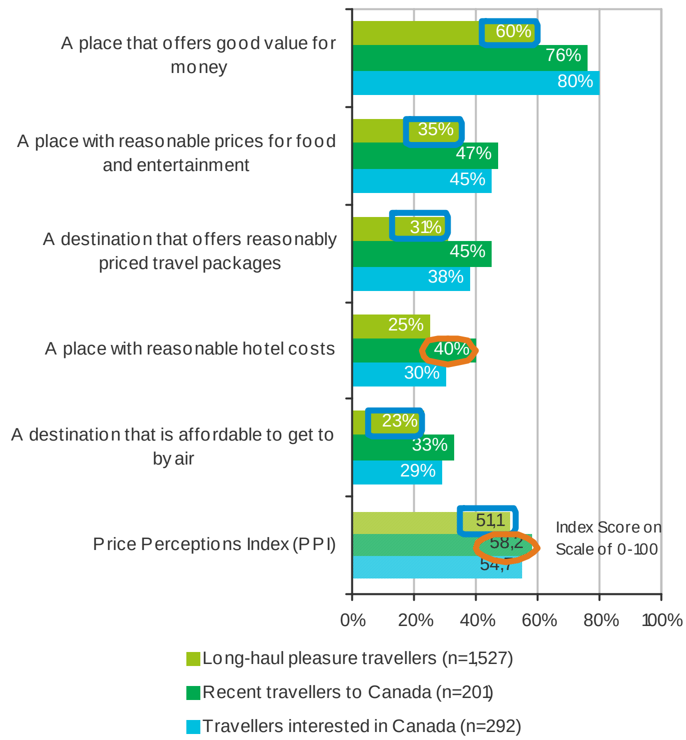

*Base: Long-haul pleasure travellers.*

*Notes: Top 2 Box refers to a rating of 4 or 5 on a 5-point scale. **Blue sqaures** indicate a result that is significantly **lower** than another group; **orange circles** indicate a result that is significantly **higher** than another group.*

*Recent Travellers to Canada: those who have visited Canada in the past 3 years (pleasure trip, 4 or more nights, 1 or more nights in paid accommodations).*

*Travellers Interested in Canada: those who are very interested in visiting Canada in the next 2 years.*

### Exhibit 12: Price perceptions




*Base: Long-haul pleasure travellers.*

*Notes: Top 2 Box refers to a rating of 4 or 5 on a 5-point scale.* ***Blue sqaures*** *indicate a result that is significantly* ***lower*** *than another group;* ***orange circles*** *indicate a result that is significantly* ***higher*** *than another group.*

*Recent Travellers to Canada: those who have visited Canada in the past 3 years (pleasure trip, 4 or more nights, 1 or more nights in paid accommodations).*

*Travellers Interested in Canada: those who are very interested in visiting Canada in the next 2 years.*

# why do japanese travellers visit canada and the regions?

## Key Motivations for Visiting Canada

As Exhibit 13 shows, nature/scenery and unique attractions/landmarks (e.g., Niagara Falls, Rocky Mountains) are firmly entrenched as the primary motivations for travelling to Canada, mentioned by 89% and 87% of travellers, respectively. This is not surprising as the same two items top the motivational list in all nine markets.

The third most important draw for Canada in Japan is visiting historical or world heritage sites, at 7 in 10. Japan is fairly distinctive in this respect – in no other market does this motivation make it into the top three. This suggests a good opportunity for Canada to develop world heritage tours and promote the countries 14 official world heritage sites in Japan. In fact, both Australia and Macau have recently adopted this angle in appealing to Japanese tourists, with major advertising campaigns that focus on their heritage sites.

Relaxing and rejuvenating in a peaceful environment is another key draw for Canada (62%). This speaks to the slow life movement that has been gathering steam in Japan. Many Japanese have become dissatisfied with society's frenzied pace and are rejecting societal norms and peer values to seek out alternative or slower lifestyles. Canada's wondrous nature and relaxing environment would likely appeal to these slow-lifers.

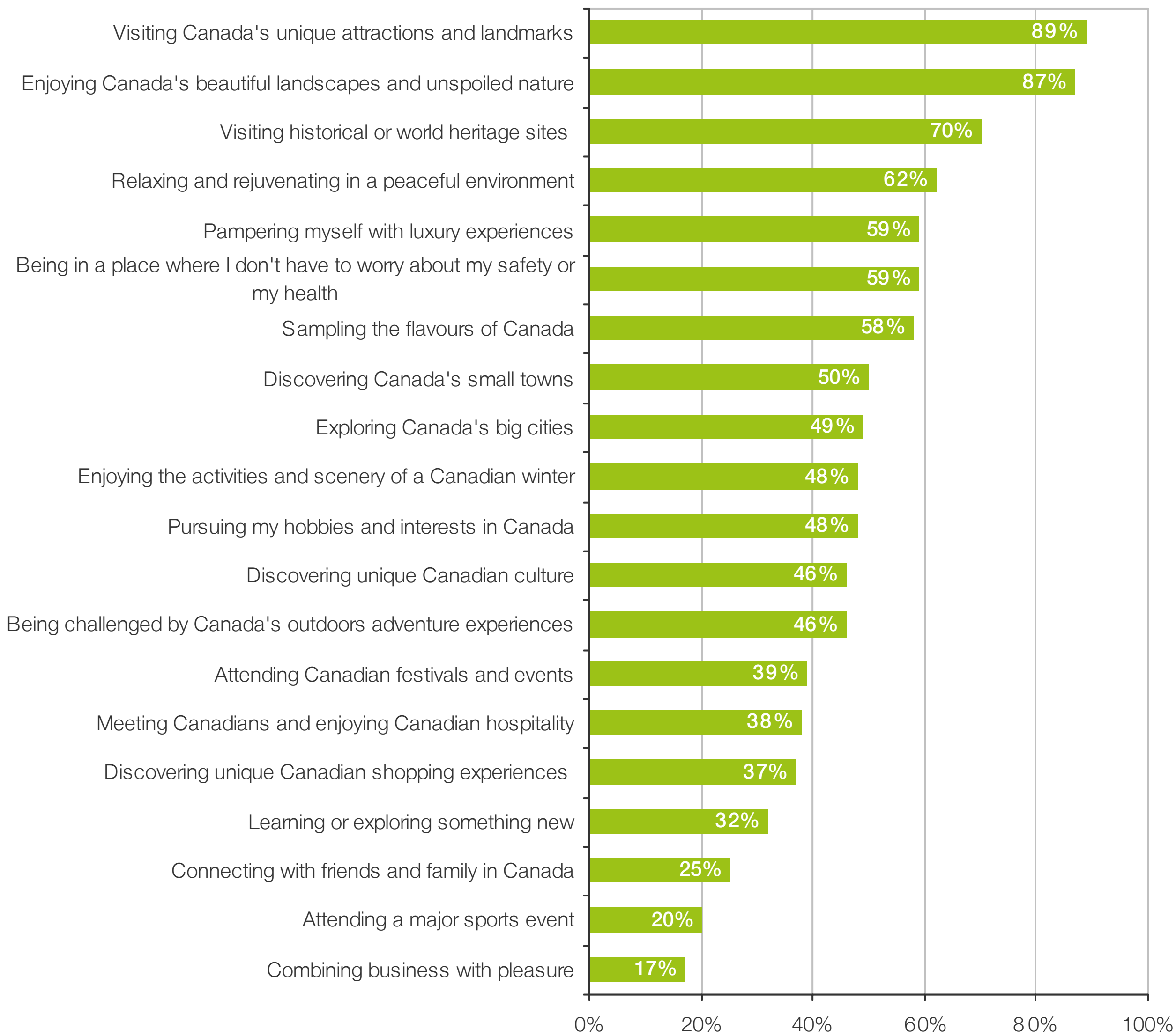
At the other end of the spectrum, many who do subscribe to the Japanese work ethic of long hours and little time off, seek pampering and luxury experiences when they do take a vacation. This is a motivation for almost 6 in 10 likely travellers to Canada, and ranks highly on the list of Japanese motivations compared with other markets. This is a positive finding as it shows that despite the US's standing as the premiere luxury destination, Japanese luxury seekers feel Canada has something to offer them as well. The fact that 6 in 10 also view Canada as offering a safe and worry-free vacation further positions Canada to capture both the rejuvenation and the luxury market.

A good proportion of Japanese travellers are interested in exploring the flavours of Canada (58%), with cuisine and wine a growing interest among the older market segments. Exploring small towns and big cities each appeal to around half of the Japanese market, so there may be some opportunity for Canada to promote its quaint towns and villages juxtaposed with its cosmopolitan cities as one of the country's unique strengths.

Fewer than half of travellers are currently drawn to Canada by its unique culture (46%), and even fewer by meeting Canadians and enjoying Canadian hospitality (38%). This suggests that although Japanese view Canada as warm and friendly, this in itself is not enough to motivate them to visit. However, cultural attractions and products are definitely important to Japanese travellers and may grow as a motivation once Brand Canada gains a foothold in the marketplace.

Interestingly, few Japanese travellers look to Canada as a place where they can explore or learn something new. At 32%, this motivation is weak in absolute terms, as well as in relation to other motivations – in no other market does learning/exploring rank in the bottom five motivations. This indicates that the main thrust of the new brand – Canada as a place for exploration and discovery – may be a bit of a tough sell in Japan.

**Exhibit 13: Key motivations for visiting Canada**




*Base: Those likely to visit Canada in the next 2 years and/or those who are considering, have decided to visit or have booked a trip there (n=804).*

*Note: Top 2 Box refers to a rating of 4 or 5 on a 5-point importance scale.*

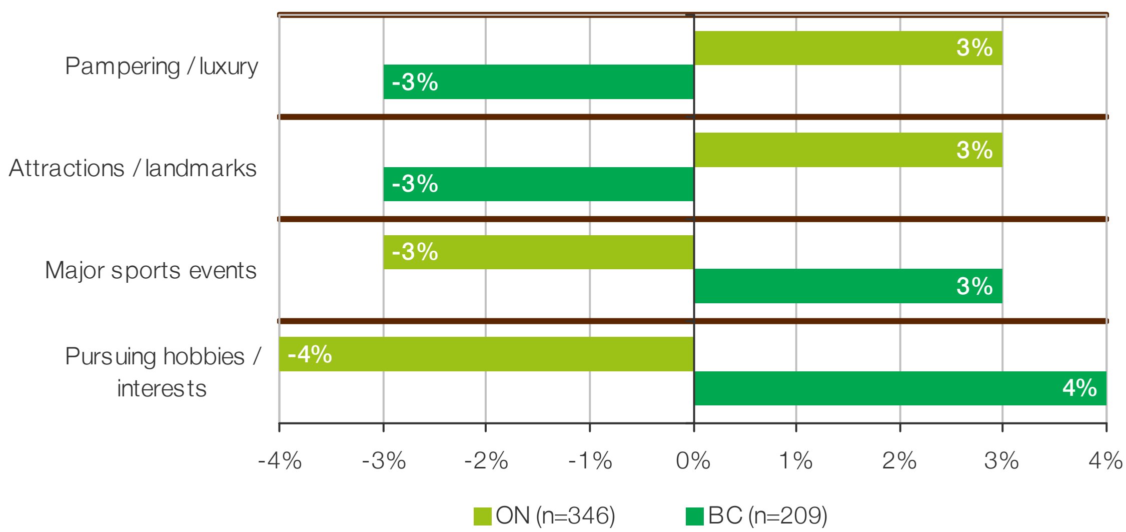
## Regional Motivations

Exhibit 14 shows how travellers that are likely to visit each of the GTW partner regions are differentiated from each other in their motivations for visiting Canada. Note that motivational scores have been re-calibrated to remove "group and attribute" effects to better emphasize the differences between the regions. In essence, this involves a two-way normalization of scores across both regions and attributes to pull out the differentiating motivations for travellers likely to visit each of the regions.

In the exhibit, high positive values indicate motivations that are of greater relative importance for a region, while high negative values represent motivations that are of lesser relative importance.

Overall, there are very few differences by region (only Ontario and British Columbia had large enough sample sizes for the analysis). Those interested in visiting Ontario are more likely to be motivated by pampering and luxury, as well as by seeing unique attractions and landmarks (e.g., Niagara Falls). Those interested in visiting British Columbia, on the other hand, are more likely to be motivated by the opportunity to attend major sports events (e.g., the Olympics) or pursue hobbies and interests (possibly outdoor activities like skiing).

**Exhibit 14: Regional motivations**




*Base: Travellers most likely to visit Ontario and British Columbia. Sample sizes for other regions were too small to be included.*

*Note: High positive values represent motivations that are of greater relative importance for a region; High negative values represent motivations that are of lesser relative importance for a region.*

# what barriers does canada face in attracting visitors from japan?

## Barriers for Travel to Canada

Exhibit 15 shows why long-haul travellers from Japan are unlikely to visit Canada in the near-term. These results are important because, more likely than not, travellers that are likely to visit may have similar concerns that could ultimately lead them to select alternate destinations.

Competition from other destinations is the top barrier among those unlikely to visit Canada in the near-term. Approximately 84% say there are other places they want to see more, and almost 60% cite this as a major barrier. This ranks Japan alongside the US as the two markets most likely to be swayed by competitor destinations. Again, this is consistent with earlier findings pointing to desirability issues for Canada in Japan.

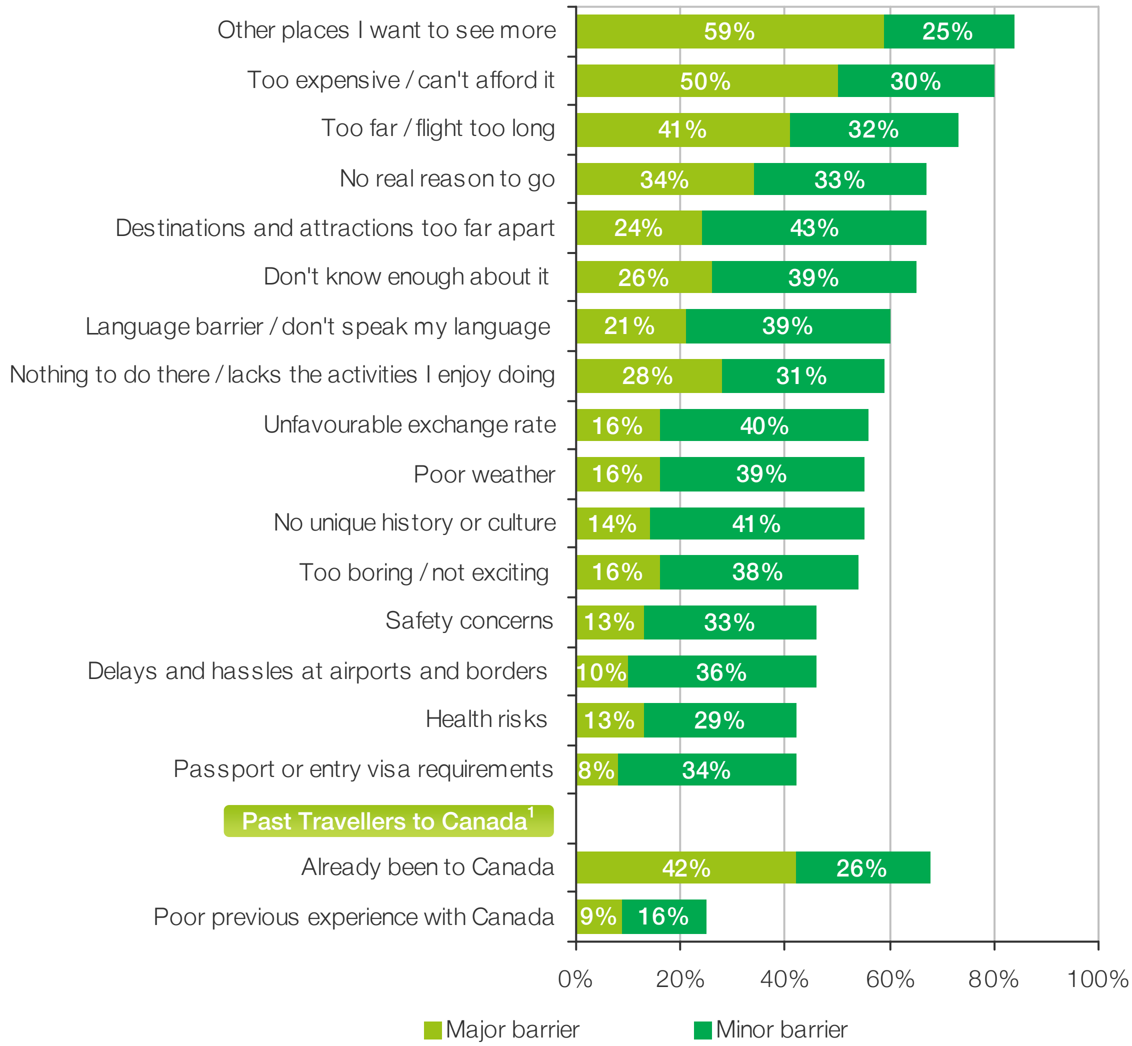
Almost as many (80%) cite affordability as a reason for ruling out Canada as a destination in the short-term. The unfavourable exchange rate is clearly exacerbating this situation, as 56% also cite this as a barrier – in the 12 months leading up to the survey, the yen dropped more than 14% against the Canadian dollar. With competition and cost being the top two barriers, it is not surprising that low-cost options in Asia are eating away at Canada's market share.

As in the other Asian markets, the distance is a major deterrent for travel to Canada, with almost three-quarters saying that Canada is too far or the flight is too long. In addition, over two-thirds identify distances within Canada as a disincentive (possibly because most want to see both Ontario and British Columbia).

Among the other top barriers, over two-thirds of travellers indicate that they have no real reason to go to Canada – in other words, nothing in particular to draw them there. Similarly, 65% of travellers say they don't know enough about Canada to consider it as a destination. Along the same lines, 59% say there is nothing to do there, 55% say there is no unique history or culture there and 54% feel that Canada is boring. All of these barriers converge around a need to build awareness and fill the obvious information gaps despite the maturity of the market, a result that was also noted earlier. Again, many of these issues arise because of Canada's one-dimensional image in Japan. The CTC and its partners have done a great job at establishing Canada's market dominance in the nature/outdoor arena; now it would be of benefit to focus their efforts on continuing to diversify their image in Japan and communicating other experiences that Canada offers, in particular history/culture.

The language barrier is much more prominent in Japan than in the non-Asian markets, but at 60%, language concerns are not as much of a barrier as in China or Korea. The same is true of airport/border hassles (46%), safety concerns (46%), concerns about health risks (42%) and passport requirements (42%). This is likely because the Japanese travel market is a more experienced and sophisticated one than its Chinese or Korean counterparts.

**Exhibit 15: Key barriers for visiting Canada**




*Base: Long-haul pleasure travellers who are unlikely to visit Canada in the near future (n=237).*

# where do japanese travellers see or hear information about canada?

## Sources of Information on Canada

Exhibit 16 indicates that specialized travel media are the most important sources of information on Canada for travellers in this market. Travel shows on television are by far the most important information source (41%), followed by articles in travel magazines (24%). Immediately behind this is travel guides/travel agents, at 22%, which is fairly high compared to most other markets. This is consistent with industry reports that Japanese travellers still rely to a large extent on travel agents to plan and make their travel arrangements, which suggests that Canada may have good opportunities to influence destination choice through the Japanese travel trade.

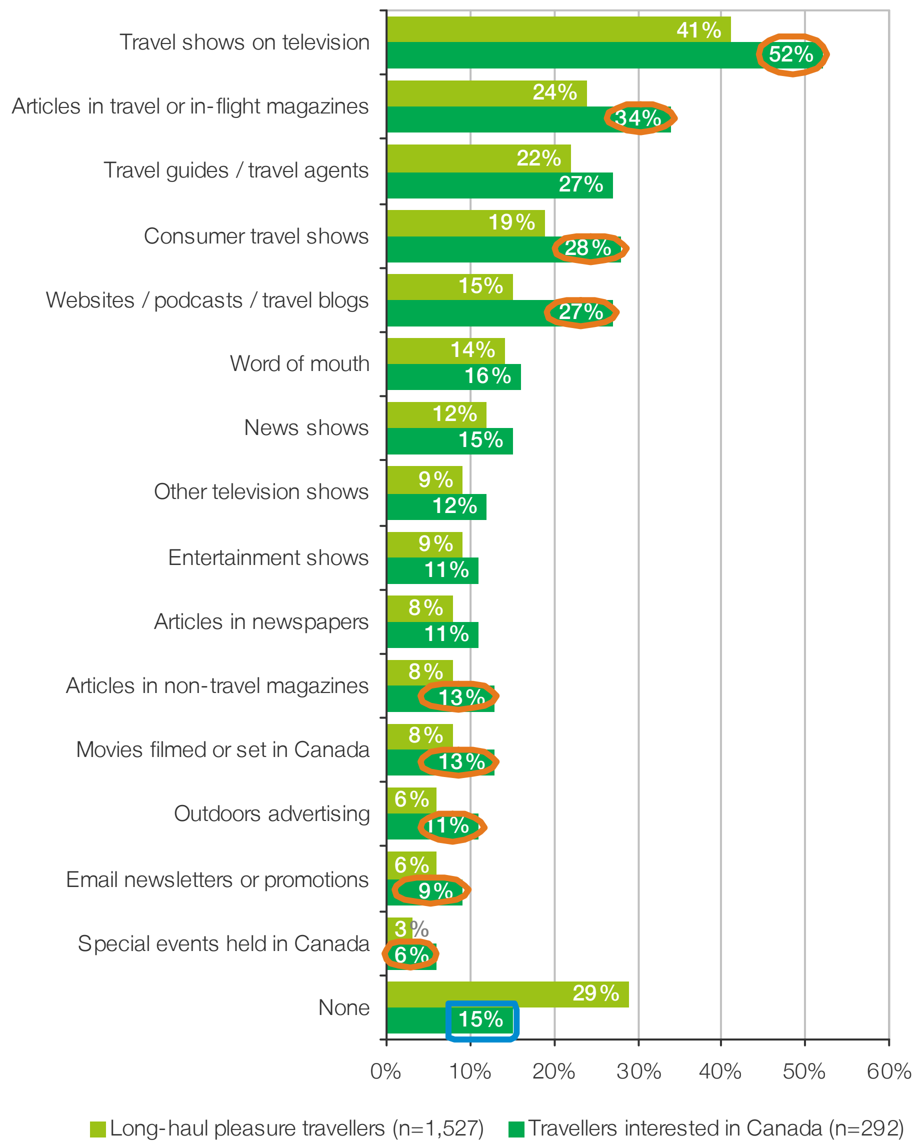
Consumer travel shows are also an important source of information and much more so in Japan than in any other market, at 19%. In no other market does this make the top five. Webcasts/podcasts/travel blogs round out the top sources at 15%, and while not especially high, the importance of the Internet as both an information tool and booking device is expected to increase dramatically in the near-term. In fact, American Airlines recently reported a tripling of online bookings in Japan.

These channels may serve as the best bets for the CTC to reach potential travellers to Canada. In fact, potential visitors are even more likely to have seen information on Canada in most of these sources. Most notably, potential travellers are almost twice as likely to have seen information on Canada on the Internet than the market as a whole.

## Top Information Sources for Increasing Canada's Appeal

Potential travellers to Canada feel that travel shows on television (35%), followed by webcasts/podcasts/blogs (18%), consumer travel shows (16%), articles in travel magazines (15%) and travel guides/agents (14%) are the best five sources for increasing Canada's appeal (see Exhibit 16). Interestingly, the relative importance of consumer travel shows increases significantly when it comes to enhancing appeal, versus increasing knowledge. This suggests that participation by the CTC in consumer travel exhibitions, such as the JATA World Travel Fair in Tokyo, is an important consideration for the marketing plan.

**Exhibit 16: Sources of information on Canada in the past 3 months**

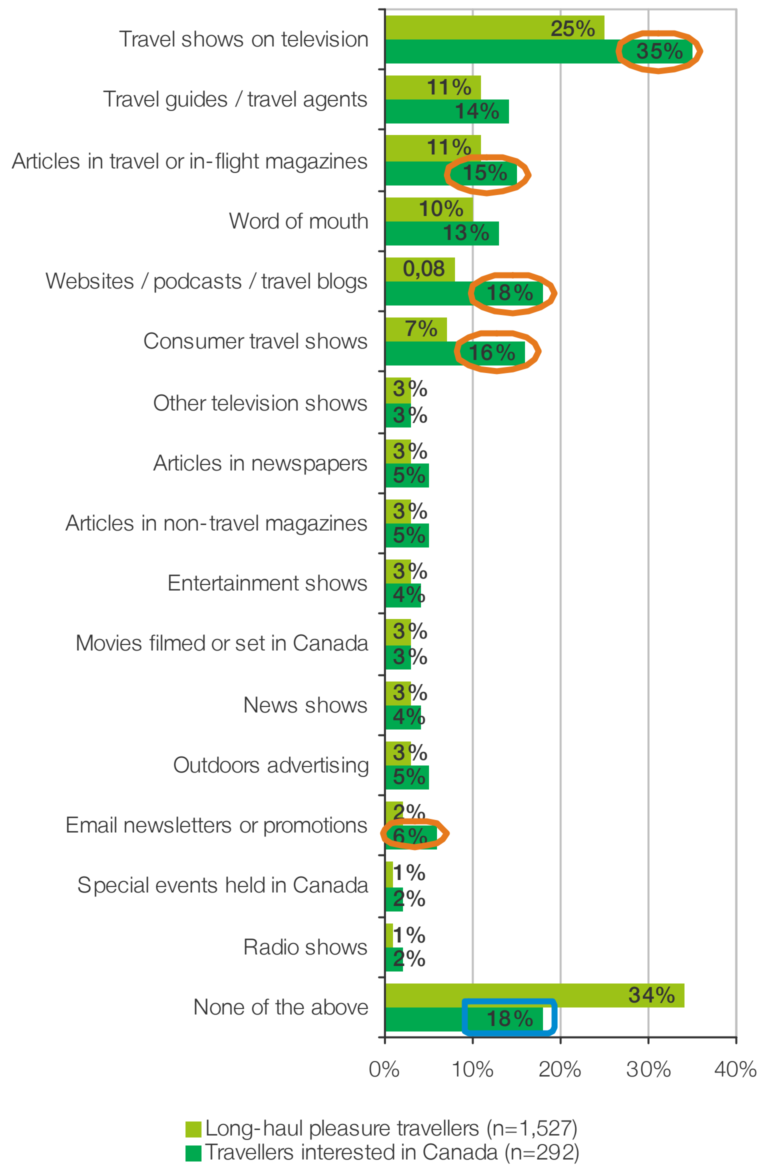



*Base: Long-haul pleasure travellers.*

*Notes: **Blue sqaures** indicate a result that is significantly **lower** than another group; **orange circles** indicate a result that is significantly **higher** than another group.*

*Travellers Interested in Canada: those who are very interested in visiting Canada in the next 2 years.*

**Exhibit 17: Top information sources for increasing Canada's appeal**




*Base: Long-haul pleasure travellers.*

*Notes: **Blue sqaures** indicate a result that is significantly **lower** than another group; **orange circles** indicate a result that is significantly **higher** than another group.*

*Travellers Interested in Canada: those who are very interested in visiting Canada in the next 2 years.*

## which icons or images inspire interest in canada?

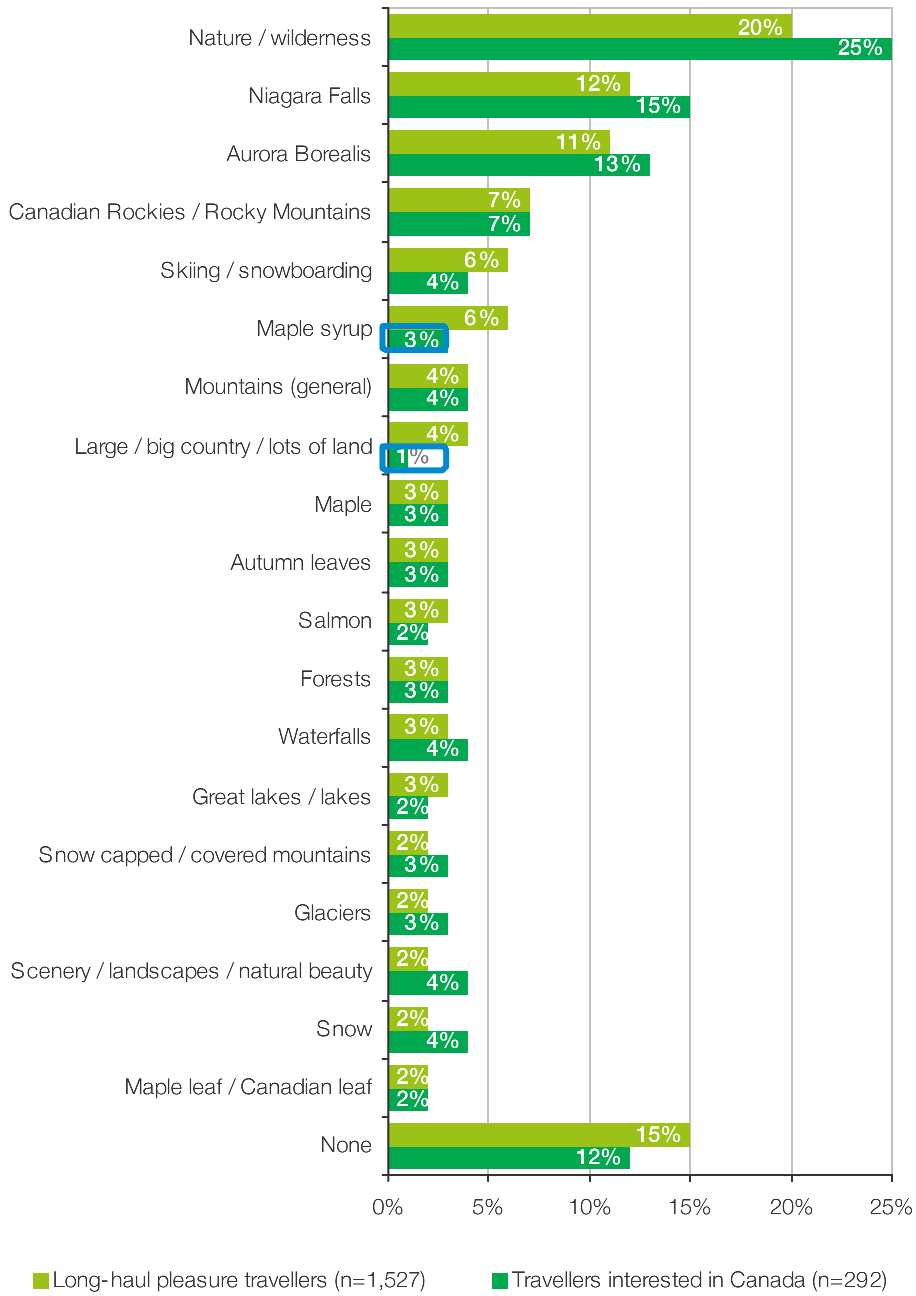
Exhibit 18 shows that nature imagery dominates the imaginations of Japanese travellers when thinking of inspirational images of Canada, as all items on the list are nature-related. General references to nature and wilderness (20%) abound in this market, supported by mentions of "large/big country/lots of land" (4%) and "scenery/landscapes" (2%) suggesting that images of wide open spaces and grand vistas may be especially appealing to Japanese travellers.

Among the more specific mentions, Niagara Falls is at the top of the list, with 12% citing this popular landmark as the most iconic Canadian image. The Aurora Borealis receives nearly as many mentions, at 11%. Notably, Japan is the only market where the Northern Lights imagery is associated with Canada; in most other markets, it is barely mentioned, if at all. The potential of the Japanese market for aurora viewing has long been recognized by destinations like the Yukon and Alaska. In fact, Japan Airlines recently increased the number of direct flights to Fairbanks in the winter months specifically to accommodate aurora-gazers, and the shorter flying time has been instrumental in stimulating the Alaskan market.

Mountains are also prevalent when thinking about Canada, with specific mentions of the Rockies (7%), mountains in general (4%) and snow-capped mountains (2%). In addition to the aurora and snow-capped mountains, other mentions of winter imagery include skiing/snowboarding (6%), glaciers (2%) and snow (2%).

Trees and forests are also appealing images to the Japanese, particularly maple trees, which are strongly associated with Canada, as evidenced by the mentions of maple syrup (6%), maple (3%), autumn leaves (3%), forests (3%) and maple leaf (2%).

**Exhibit 18: Icons or images that inspire interest in Canada**




*Base: Long-haul pleasure travellers.*

*Notes: **Blue sqaures** indicate a result that is significantly **lower** than another group; **orange circles** indicate a result that is significantly **higher** than another group.*

*Travellers Interested in Canada: those who are very interested in visiting Canada in the next 2 years.*

# what are japanese key drivers for visiting canada?

A logistic regression analysis was conducted to examine the key drivers of intentions to visit Canada in the next two years. Logistic regression analysis is a statistical modelling technique that assesses the relationship between a single dichotomous dependent variable and several independent or explanatory variables to determine which factors drive the dependent variable.

A model was developed with the dependent variable being whether or not travellers are likely to take a pleasure trip of four or more nights to Canada in the next two years. The independent variables that were modelled against likelihood of visiting included:

- Demographics – including region, age, gender, education, household income, children in the household and friends/relatives living in Canada;
- Perceptions of Canada – including price, value and brand image ratings, as well as brand personality perceptions;
- Product Interests – including nature, outdoors, culture and luxury/pampering (activity factors); and
- Travel Behaviour – including previous visitation of Canada, importance of long-haul travel, and willingness to pay for environmentally-friendly tourism products.

Exhibit 19 summarizes the results of the key drivers model, with key findings discussed below:

Having friends or relatives in Canada is the single biggest predictor of future travel intentions, as those who do are nearly three and a half times as likely as those who do not to say they will visit Canada in the next two years.

Everything else being equal, those over 55 years of age are almost three times as likely to say they will visit Canada as those under 55. Notably, however, actual visitors to Canada skew younger, so there may be an opportunity for Canada to target older travellers more aggressively and improve realization among this cohort.

The model suggests that the CTC should target travellers from high income households (i.e., over 10 million yen annually), as they are almost twice as likely to say they will visit. This is generally in accordance with the affluence levels of travellers who actually do make the trip.

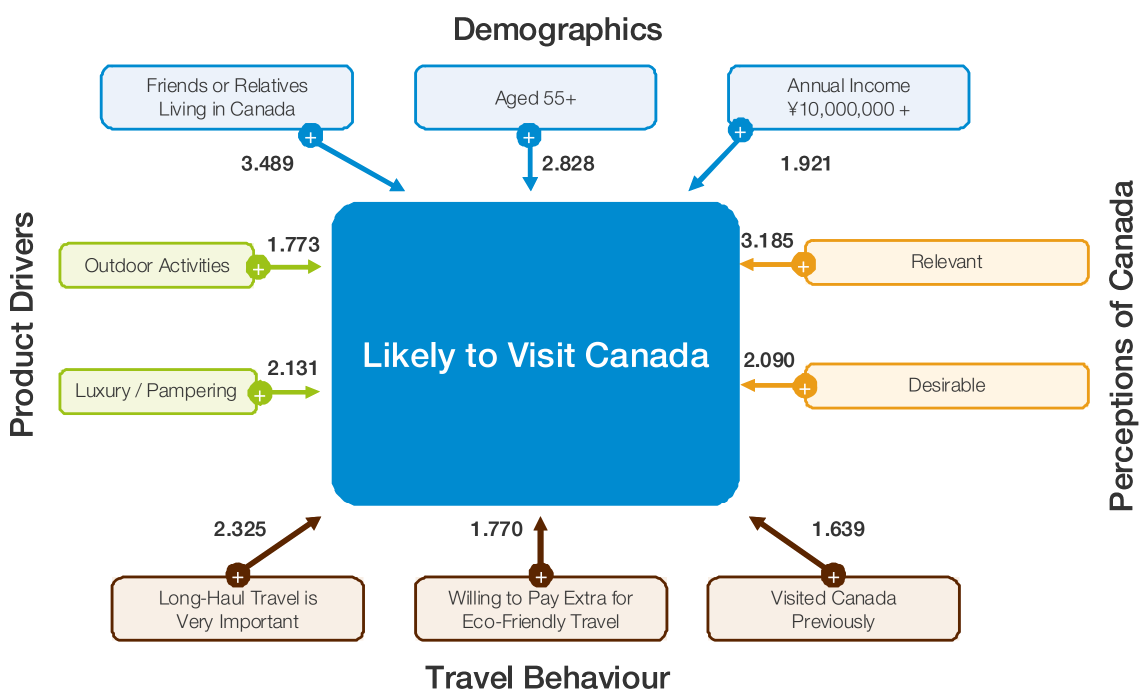
Perceptions of Canada also have a strong influence on the purchase decision, with relevance of products especially important and desirability also having a big impact. In other words, those who view Canada as offering the kind of experiences they are specifically looking for, and those who see Canada as a dream destination are more likely to visit than travellers who do not share these sentiments. Fortunately, Canada performs fairly well on relevance, but desirability is poorly rated, reinforcing the need for Canada to really focus on boosting Canada's overall desirability in the Japanese market.

With respect to travel behaviour, self-identified travel lovers (i.e., those for whom long-haul travel is very important) are more likely to say they will make the trip to Canada in the next two years, as are those who are willing to pay more for eco-friendly travel.  Past visitation also has an impact on future intentions, although, notably, not as strong as in most other jurisdictions.

As mentioned, luxury travel is a growing market segment in Japan, and a top motivation for travellers to Canada.  The model supports these findings, showing that travellers who view Canada more strongly in this regard are significantly more likely to visit.

Finally, outdoor activities are a strong pull factor for Canada, as is true in virtually every market.

**Exhibit 19: Key drivers for likelihood to visit Canada**




*Base: Long-haul pleasure travellers.*

*Notes: Numbers are odds ratios. Odds ratio is the exponentiated value of B. If >1, the odds ratio is the factor by which the odds of being likely to visit Canada increase as the independent variable increases; if <1, it is the factor by which the odds of being likely to visit Canada decrease.*

# conclusion and considerations

While the Japanese still place a high degree of importance on travel, there has been a shift towards taking shorter trips closer to home, with nearby Asian destinations like China being the major beneficiaries. This trend is being been fuelled by a growing price-sensitivity among Japanese travellers – the combined result of a weak Yen, high inflation, steeper travel costs and declining incomes.

Consideration of Canada as a travel destination and travel intentions are very low, the lowest in fact, of any CTC market. Taken together, these indicators suggest that Japanese arrivals to Canada will not recover in the near-term. If anything, the worsening Japanese economy could soften demand for travel to Canada in the coming year, while intensifying competition from low-cost alternatives in Asia. The good news, however, is that many of Canada's direct competitors are in the same boat.

Still, the Japanese market is a large one in terms of overall potential, with over 12 million long-haul pleasure travellers interested in Canada, ranking it as the CTC's second largest overseas market. However, when looking at the market that can be immediately targeted for conversion, Japan drops down to fourth place, behind the UK, France and Germany, with a potential of only 3 million travellers. This again highlights the more limited short-term potential in this market. Moreover, the survey results suggest that realizing this potential will require considerably more work by the CTC to promote the new brand, broaden impressions of Canada's product offerings beyond nature, and improve both value and cost perceptions of Canada in Japan.

Specific marketing implications arising from this study that the CTC may wish to consider, depending on its mandate, priorities and budgets are as follows:

## Key Performance Indicators

***Keep pace with Canada's competitors.*** Canada's performance on all of the key indicators – destination awareness, advertising awareness, interest and travel intentions – is very low across the board. In fact, Japan has the lowest scores of any surveyed market on virtually every indicator. To some extent, this reflects the unfavourable external environment in Japan and the overall movement of the market away from long-haul travel. Under these conditions, many of Canada's major competitors have ramped up their marketing efforts (e.g., Australia, Hawaii) in an attempt to win back Japanese travellers, with several touting value for money messages. So Canada may benefit by boosting general presence in the Japanese marketplace in order to remain competitive and maintain its current market share.

***Enhance awareness among the new wave of potential travellers.*** The Japanese market consists of an interesting mix of travellers. While a fairly large proportion (26%) has visited Canada before (with many considering a return trip), there is also a larger than average segment of potential first-time travellers who say they don't know anything about Canada (21%). Another 14% are curious about Canada, but lack information about it, for a total of 35% who say they are in the dark about Canada. This suggests that there is still some general awareness building to be done to help push these laggard segments along the purchase cycle and spark the next wave of Japanese travel to Canada.

## *Brand Performance*

***Strengthen perceptions of Brand Canada.*** The GTW results suggest hat there is clearly a long way to go in positioning the new brand in Japan. At present, Canada is viewed as a friendly, relaxing and down-to-earth place where travellers can enjoy grand nature and the best of the great outdoors, but not much else. The CTC may want to hammer home the more exciting and engaging aspects of the brand in its marketing initiatives to move Canada beyond its one-dimensional and somewhat conservative image. However, this should be done in such a way that Canada retains its authenticity, as this is highly important to Japanese travellers.

***Strengthen the Culture and People brand pillars.*** Brand Canada is supported by three brand pillars – Geography, Culture and People. While Canada is relatively well-perceived on its physical/natural attributes, it could strengthen perceptions of its culture and people for a more well-rounded brand image. Today's Japanese travellers want to immerse themselves in the culture and history of a place and engage in deep travel that goes beyond the superficial. This ties in nicely with the elements of the new Brand Canada – and indicates that once the brand's weaker performance points are addressed; it should perform well in the Japanese market.

***Engage traveller emotions.*** The GTW indicates that brand Canada has not yet engaged the emotions of Japanese travellers. Fewer than half say that Canada elicits positive emotions for them, less than 40% associate it with extraordinary travel experiences, and under 30% feel that Canada is a place for self-expression. Moreover, desirability is the lowest-rated of the value attributes, which again suggests that Canada fails to stir Japanese emotions. Canada would benefit from more excitement and buzz around the Canadian travel experience and the brand. In fact, the CTC may wish to consider some qualitative research to determine how to do this in a way that is in keeping with Japanese cultural nuances.

***Improve value and cost perceptions of Canada.*** In its drive to promote the brand, Canada should not overlook the opportunity to enhance impressions of both value and cost. When it comes to the purchase decision, value has by far the greatest influence. Among value attributes, desirability could be a key area of focus as this is not only the lowest-rated aspect of value, but the most important in influencing the purchase decision. Cost perceptions of Canada are also poorer in Japan than in any other market, and are a significant barrier to rebuilding this market in today's price-sensitive environment. While Canada will never be able to compete with low-cost Asian destinations, the CTC could work to improve perceptions of cost relative to its key long-haul competitors (e.g., US, Europe).

## *Product Opportunities*

***Maintain Canada's position of strength on nature/outdoor.*** While Canada would most likely benefit greatly by diversifying its image, the country's clout in the nature and outdoors arena is still its most readily identifiable calling card and a major advantage for Canada in the Japanese market. More than just clear product strengths, these are fundamental drivers in the purchase decision. With a dominant leadership position on most nature/outdoor activities, the only opportunities to substantially strengthen Canada's positioning are on niche products like cycling, hiking/trekking and wildlife.

***Enhance awareness of cultural products.*** Although Japanese travellers are among the least culturally curious about local lifestyles, they are one of only two markets that rate historical and cultural attractions as the number one thing to do while on holiday. This suggests that they prefer their culture to be served up in the more concrete form of attractions, historic buildings and museums (as attested by the past popularity of Anne of Green Gables) than by mingling with the locals. Currently a product weakness, Canada could gain some ground by promoting attractions with a colourful history to fire the Japanese imagination (e.g., Dawson City, Gasstown, Maritime Museum) as well as attractions that may be of special interest to this market (e.g., the Japanese Canadian National Museum).

***Promote touring opportunities.*** Independent and guided tours are among the few majority interests in the Japanese market, but both are perceived as current product weaknesses for Canada, perhaps because travellers view Canada as having little to see beyond nature. The market leaders in the touring area – Europe, Australia and the US – are all destinations with diverse product strengths. Again, this emphasizes the need to broaden awareness of Canada's product line, particularly its famous cities and unique cultural/historical attractions. Canada could also highlight combined nature-urban or nature-culture itineraries in the Japanese market, with a good mix of sights and activities.

***Enhance perceptions of Canada's luxury offerings.*** Despite the market's current price-sensitivity, the luxury market is a segment offer good long-term growth, particularly among the older age cohorts who tend to be more interested in luxury experiences than goods. While luxury/pampering is not currently viewed as a Canadian product strength, it emerges as both a key motivation and product driver for travel to Canada (especially for those interested in visiting Ontario). Accordingly, promoting these types of offerings may be a good way to build interest and excitement, while diversifying Canada's image (e.g., high-end hotels, gastronomy, entertainment, shopping, fashion districts, film festivals) or complementing existing strengths (e.g. premier resorts in spectacular natural settings, ski resorts).

***Jump on the wellness bandwagon.*** Health and wellness is a major lifestyle trend in Japan, and has spearheaded the growing Slow Life movement. Accordingly, Canada could showcase the country's leading spas, wellness retreats and hot springs, with those in a natural setting being the most likely to win points with the Japanese.

## *Strategic Marketing*

***Target the older, more affluent segments of the market.*** The key drivers model identifies travellers aged 55 plus, earning 10 million yen per year or more as Canada's primary target market in Japan (i.e., travellers most likely to visit Canada in the next two years). The 55+ segment is one that is expected to boom over the next decade, and Canada may want to take advantage of this growth. Canada could promote its world heritage sites to these older travellers, as well as special interest products like wine and cuisine, gardens, walking tours and soft outdoors activities such as easy hiking trails. It also makes sense to target more affluent Japanese under the currently tough market conditions.

***Use specialized travel media and channels to reach potential travellers to Canada.*** Japanese travellers are predominantly getting their information on Canada through specialized travel media, and these sources are also the best for increasing knowledge and appeal of Canada. Television travel shows are by far the top source in all three cases, so airing features on Canada and in-depth profiles of Canadian travel experiences/destinations on popular shows may be a good way to reach travellers for maximum impact. However, given the cost, the CTC may wish to consider travel magazines, travel guides and Internet travel sites/podcasts/blogs as alternatives. Consumer travel shows tend to be more important in Japan than in other markets in enhancing the appeal of a destination, so a Canadian presence at events such as the JATA World Travel Fair is an important consideration for the marketing plan..

***Broaden the images used to represent Canada.*** Nature imagery is very appealing in this market and closely associated with Canada, so it would be prudent to use these images in marketing initiatives, with a focus on grand vistas, wide-open spaces, mountains, forests and the ever-popular shots of Niagara Falls. Images of autumn/maple leaves and the northern lights could also be used as these are felt to be strong Canadian images. However, given the need to diversify Japanese travellers' one-sided view of Canada, it would be important to present images that bring Canada's rich cultural attractions to life, highlight its historical/heritage sites and show off its cosmopolitan cities in a convincing way.

***Leverage the 2010 Olympic Games.*** That 4 in 10 Japanese travellers say their desire to visit is enhanced by Canada's hosting of the Olympics suggests there are already some opportunities to leverage the Games to enhance Canada's positioning in the international arena and enrich image perceptions globally. According to the Australian Tourist Commission, hosting the 2000 Games was the single most beneficial event in the history of Australian tourism, and accelerated the development of Brand Australia by 10 years. The CTC should continue to work together with Tourism British Columbia, Olympic sponsors and the international media to build excitement in the years leading up to the Games and ensure that everything is ready for the few weeks in 2010 when the eyes of the world will be on Canada.