



Canadian Tourism
Commission

Commission canadienne
du tourisme

Canada

Tourism steps up to the podium:

Canadian Tourism Commission reports on
leveraging the 2010 Winter Games for Canada

Interim Report for 2010



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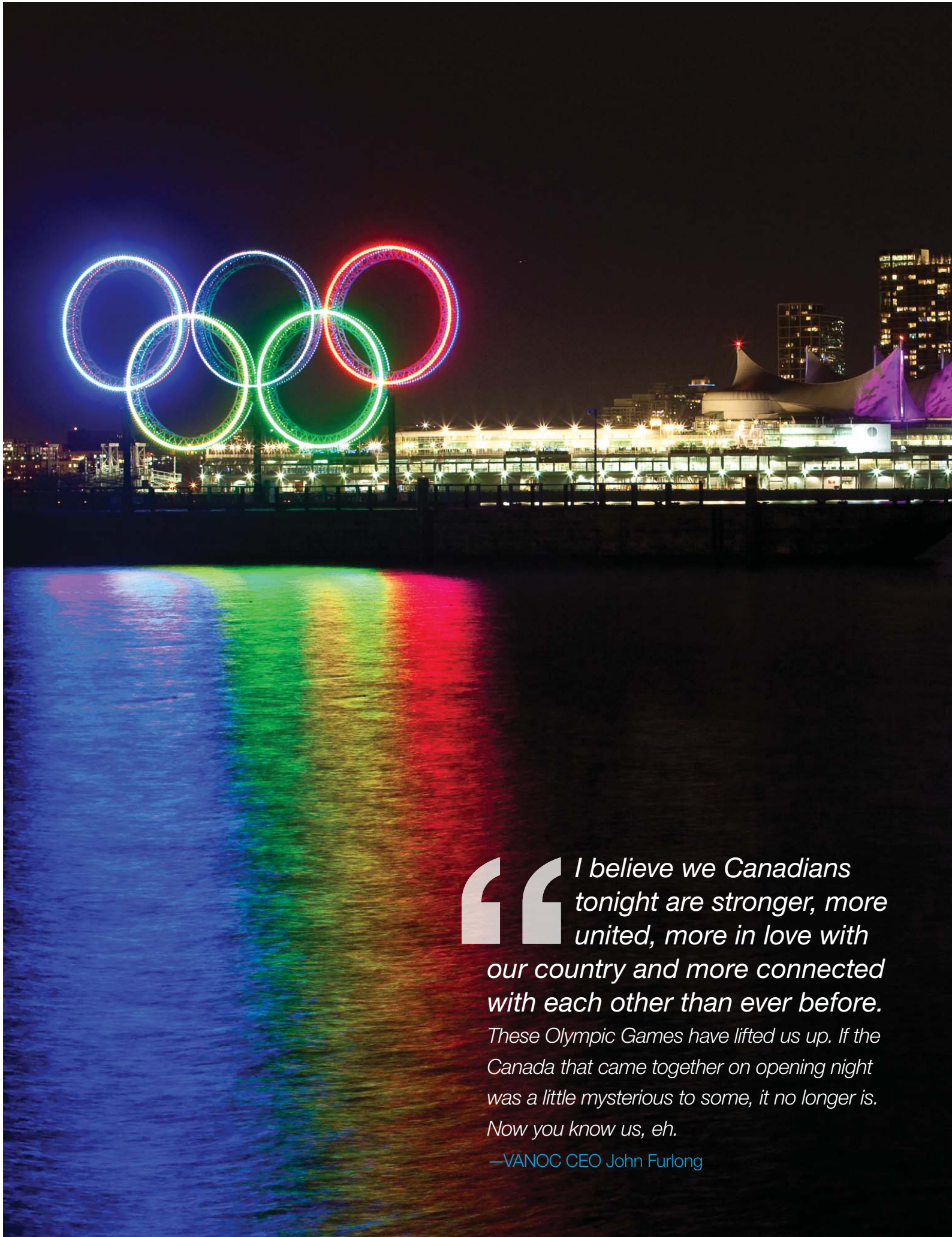
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I believe we Canadians tonight are stronger, more united, more in love with our country and more connected with each other than ever before. These Olympic Games have lifted us up. If the Canada that came together on opening night was a little mysterious to some, it no longer is. Now you know us, eh.

—VANOC CEO John Furlong

Executive Summary

The 2010 Winter Olympic Games, Canada's Games, will long remain a credit to the Games' organizers, the inspirational athletes, and to the Canadian people. The Canadian Tourism Commission (CTC) is pleased to honour the anniversary of the Games with a 'thank you' to the visionaries and the volunteers who made the country proud.

The CTC is also pleased to provide the public with an interim accounting of early results for the Government of Canada's investment in a ground-breaking \$26 million strategy built around the Games—focused on tourism.

The CTC has worked to ensure that every possible benefit has been obtained from hosting the Games. In 2004, in anticipation of being on the world stage, the CTC embarked on the development of a new brand for Canada. Changing consumer perceptions of a brand that has repeated the same message for over 40 years is a major undertaking. Yet that was the task confronted by CTC when it set about reimagining Canada's position from a place to see mountains, moose and Mounties to one that offered exciting experiences to the curious traveller.

From the outset, the CTC understood that its job was to market Canada, not a sports event. The Olympic podium was the platform to advance Canada's tourism brand internationally, adding depth and dimension to the country's image as a premier tourism destination.

As part of the CTC strategy, Canada became the first hosting country to successfully showcase newly-produced, high definition footage of all regions of the country, along with great travel stories, through the international media. Audiences around the globe followed the Games, and also got a great taste of Canadian adventure and what awaits them here.

The day after the flame was extinguished, the Canadian Tourism Commission began the final phase of its Olympic tourism strategy, ensuring that Canadian tourism is the single greatest beneficiary of those Games, in the months and years to come.

Canada also became the first hosting country to have a post-Games tourism strategy—one that focuses on bridging gaps for travellers, and keeping Canada front of mind. The CTC, through new marketing campaigns and investments, is helping make sure that prospective visitors can find, and experience, the Canada that they saw during the Games.

Through the Vancouver 2010 Olympic and Paralympic Winter Games, Canadians themselves became this country's brand.

Along the way, we fell in love with our country all over again—and shared an authentic and beloved destination with the world.

—CTC President & CEO
Michele McKenzie

Here are some highlights from today's interim report:

- **Awareness of Canada as a tourism destination, created through the Games, is translating into travel bookings in CTC core markets as a result of our Post-Games marketing campaign.**
 - In 2010—290,000 British travellers were inspired by Canada's marketing campaigns to book flights to Canada—almost double 2009 and triple 2008 figures. Tourism revenue was up over 2009 from \$256 million to \$380 million, reflecting the additional traffic.
 - Over 70,000 Australians shifted from considering a trip to Canada, to making a firm booking in 2010—double 2009 numbers. Revenue rose from \$62 million to \$117 million.
 - Some 128,000 German travellers were persuaded by CTC marketing campaigns to book a trip to Canada in 2010, up from 91,000 the previous year. Revenue rose by \$61 million to \$196 million.
 - CTC marketing campaigns convinced 120,000 French travellers to take a trip to Canada, generating \$160 million in revenues.
- **CTC's media and public relations activity around the Games resulted in global coverage for travel to Canada, and roughly \$1 billion in 'Advertising Value Equivalency' in 2010.**
- **Global audiences were reached 12 billion times in 2010 by Olympic coverage with Canadian tourism messages that were influenced by the CTC and its partners.**
- **FutureBrand ranked Canada Number One Country Brand in 2010, crediting the positive effects of hosting the 2010 Winter Olympics, and noting CTC's Olympic Games Tourism Strategy and its strong tourism Brand as a key influence.**
- **International visitation to Canada rebounded in 2010 according to Statistics Canada and according to the Conference Board of Canada, Canada's tourism industry is set to deliver solid growth through 2014.**

The CTC launched the "Keep Exploring" brand in 2006 to use this revitalized international tourism brand to capture the world's attention during the 2010 Games.

The results included in the interim report demonstrate that the strategy is working.

No question the biggest winners of the 2010 Winter Olympics were the Canadian people, who were unfailingly polite, passionately patriotic, and self-deprecating enough to poke fun at themselves in the Closing Ceremonies.

—The Miami Herald.com

“ Thank you, Canada. For being such good hosts. For your unfailing courtesy. For reminding some of us we used to be a more civilized society. Mostly, for welcoming the world with such ease and making lasting friends with all of us.

—Brian Williams, NBC News





“ For Canada, I'd call it a 'coming of age' moment. The country, all 35 million of us, were able to bare our patriotic souls in an outburst of unbridled patriotism not seen before. —The Toronto Star

CTC 2008-2012 Olympic Games Tourism Strategy

On July 2, 2003, Vancouver was awarded the right to host the XXI Olympic Winter Games in 2010. The announcement was a momentous occasion for Canada and equally significant for Canada's tourism industry.

The Canadian Tourism Commission (CTC) immediately recognized it as a once-in-a-generation opportunity for Canada. With some 3.5 billion viewers worldwide, a major global sporting event like the Olympic Games would present an unparalleled occasion to showcase Canada and to reach audiences on a global scale with images of the country, our people and culture.

The CTC believed that with the right strategy, a legacy of the Games could be greater interest in Canada as a travel destination, and ultimately more visitors. With this in mind, the CTC set out to ensure that Canada made the most of the 2010 Games, using this incredible opportunity to advance Canada's tourism destination strategy, to showcase Canada's tourism brand internationally, and to add depth and dimension to Canada's image as a premier tourism destination.

In 2004, the CTC embarked on the development of a new brand for Canada, launching *Canada. Keep Exploring* two years later. It replaced Canada's previous tourism brand, *Discover our True Nature*, effectively throwing out a half century of predominantly nature-based depictions of Canada in favour of a more progressive image of the country told from a traveller's point of view. It was a major undertaking. The aim was to use this revitalized tourism brand captured through the lens of the 2010 Games to help change perceptions about what Canada is all about.

In November 2007, the Government of Canada allocated \$26 million over five years (2008-2012) to the CTC to maximize and leverage the tourism opportunities presented by Vancouver's staging of the Olympic Winter Games. The CTC used this funding to implement its Olympic Games Tourism Strategy, as well as to work in partnership with our tourism and Olympic partners, Olympics sponsors, television broadcast rights holders and the media to maximize the tourism opportunities presented by the Games.

The goals of the CTC's five-year (2008-12) Olympic Games Tourism Strategy, "Leveraging Canada's Games," are two-fold: to accelerate global awareness of Canada's refreshed tourism brand, *Canada. Keep Exploring*, and to grow tourism export revenues for Canada over the long term.

The strategy also outlines five objectives:

- Accelerate CTC corporate strategy
- Add depth and dimension to Canada's unique image
- Build a new tourism brand personality for Canada
- Ensure lasting, positive effects for the tourism sector
- Promote the 2010 Winter Games as Canada's Games.

In its strategy for the 2010 Games, Canada became the first country to integrate tourism experiences into the media coverage for global broadcast outlets. What's more, CTC gave media organizations the material they wanted, exactly the way they wanted it.

—World Travel Market (WTM)
Business Magazine, 2010

We have reached (and still are reaching) these goals and objectives through a three-phase approach:

- **Phase 1: Brand Building** (2008-2010) focused on creating a personality for Canada and enhancing the way the country's tourism experiences are communicated to the world.
- **Phase 2: Media Relations** (2008-2010) introduced to international media a refreshed Canada experience through dynamic and intriguing images and stories, building Canada's tourism brand while establishing key relationships both before and during the Games.
- **Phase 3: Harvesting the afterglow effect** (2010-2012) focuses on sustaining the intrigue and interest created for a new travel experience to Canada by aggressively converting travel interest into intentions—i.e., “closing the sale.”

The primary focus of the CTC during the Games was working with international media to showcase Canada to the world as a premier tourism destination. As 3.5 billion viewers watched and cheered for Canada's Games, we ensured that when they saw a Canadian tourism experience, they could find it and buy it.

Another key part of the CTC's Olympic Games Tourism Strategy was to use the Games to add depth and dimension to Canada's tourism brand by aligning Canada's brand, *Canada. Keep Exploring*, with the Olympic brand—one of the most recognized in the world.

Bolstered by the Olympics, which placed the Canadian tourism brand on the world stage in 2010, the *Canada. Keep Exploring* messaging has changed the way the world views Canada. All of this has served to rank Canada first in FutureBrand's 2010 Country Brand Index, an incredible achievement. After launching the revitalized tourism brand, Canada leapfrogged from twelfth place in 2006 to sixth place in 2007, and jumped again to second place in 2008, a position it held again in 2009. Amid this jostling, Canada's tourism brand has emerged as powerful, engaging and vibrant in an intensely competitive international tourism marketplace.

The CTC is currently working on Phase 3 of our strategy, “closing the sale.” We are capitalizing on the fact that thanks to our wildly successful first two phases—brand building and media relations—Canada is still front of mind for consumers. Our goal is to drive them down the path to purchase.



Bottle that Vancouver enthusiasm and London 2012 will really hit the spot. The London Olympics can take their cue from Vancouver, its organizers and its volunteers.
—The Guardian

CTC's Olympic Logic Model and Expected Outcomes

The CTC devised a logic model for our Olympic Tourism Strategy. This model identified the activities, outputs and outcomes that support the overall goal of the CTC, namely, "Grow tourism export revenues for Canada."

The outcomes of the CTC's Olympic activities include:

Immediate (2008-2009)

- Maintain partnership contribution target
- Increase CTC relevance to partners
- Ensure CTC assets are used by media
- Increase advertising equivalency
- Increase audience reach on the Olympic Games and Canada's tourism message.

Medium- and Long-term (2010-2012)

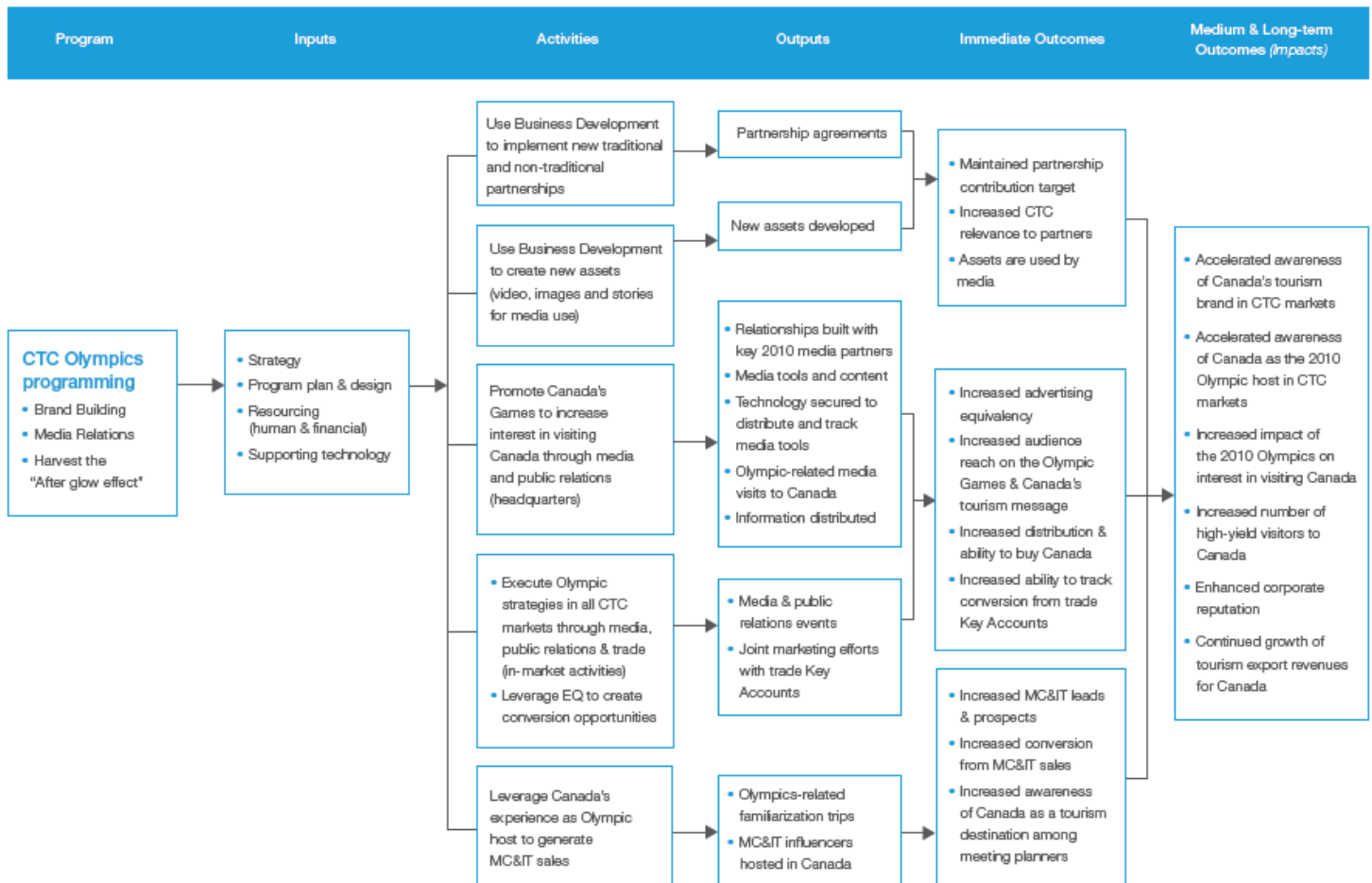
- Accelerate awareness of Canada's tourism brand in CTC markets
- Accelerate awareness of Canada as the 2010 Olympic host in CTC markets
- Increase impact of the 2010 Olympics on interest in visiting Canada
- Increase number of high-yield visitors to Canada
- Continue growth of tourism export revenues for Canada
- Enhance corporate reputation.

CTC's Olympic Games Tourism Strategy Dashboard containing key performance measures associated with the Strategy is on page 27.

Canadians used to think of themselves as being quiet, modest and unassertive. No longer. After their athletes topped the medals table with 14 Golds, some 100,000 flag-waving locals took to the streets... deliriously singing the national anthem.

—The Economist





Yang Yang, speed skater and 2010 Olympic Torch Relay participant from China, in Prince Edward Island while participating in the 2010 Torch Relay International Media Program.

Phase 1: Brand Building

Our brand-building initiatives were designed to promote Canada's tourism brand in association with Canada's Games and to maximize collaboration with key partners. The results included partnership agreements with key 2010 Winter Games sponsors and media assets such as new video footage, images and stories of Canada, social-media content and high-definition broadcast footage.

Our Brand Building Targets and Results

During this first phase, the CTC focused on building relationships and establishing the groundwork for programs that ran in the pre-Olympic period from November 2008 through February 2010. While we developed relationships with media and new business partners, our most notable success was developing partnerships with 25 non-Olympic organizations—21 more than the original target! Partners included all 13 provincial and territorial marketing organizations and several airport authorities.

In fact, we met or exceeded most Phase 1 performance targets.

Measure	Target	Result	Trend
Non-commercial license agreement with VANOC	Yes	Yes	Target achieved
Partner agreements with VANOC	3	5	Target surpassed
Partner agreements with international Olympic sponsors	2	2	Target achieved
Other partners engaged (not VANOC or Olympic sponsors)	4	25	Target surpassed

Partnership with the Vancouver Organizing Committee for the 2010 Olympic and Paralympic Winter Games (VANOC)

In February 2008, we entered into a non-commercial license agreement with VANOC that permitted us to use the Olympic brand to showcase the 2010 Winter Games. In the 18-month run-up to the Games, we used these brand marks in over 340 events that promoted Canada as a tourism destination, exposing millions of consumers to Olympic-themed and Canada's travel-brand images and messages.

Partner agreements with VANOC

Having a shared interest in leveraging the international media exposure of the 2010 Winter Games, we signed a partnership agreement with VANOC to develop the **Connecting with Canadians Program**, which was designed to focus media attention on Olympic and Paralympic athletes and to create unique and compelling stories about Canada as seen through the eyes of their families.

In partnership with VANOC and Department of Foreign Affairs and International Trade (DFAIT), the CTC developed the **International Mascot Program**. The mascots made their first international appearance on November 20, 2008 in Shanghai, at the largest travel-trade show in Asia. The presence of the mascots, along with CTC's Olympic messaging, generated additional attention from the media, consumers and trade-show participants.

In 2009, a third partner agreement with VANOC resulted in the development of a **Torch Relay** program designed specifically for international media, which provided global exposure for lesser-known Canadian travel destinations.

In collaboration with the National Tourism Marketing Working Group (comprised of provincial and territorial representatives), the CTC negotiated the **National Asset Development Program (NADP)**, which produced many Canadian tourism stories and visual assets reflecting experiences from all provinces and territories in Canada. In addition, a CTV partnership resulted in the production of 23 broadcast quality features on Canada, and were available to all rights-holding broadcasters of the 2010 Winter Games.

NADP Program: Facts & Figures

- More than **3,200 compelling still images** accessible for media to download free of charge from the CTC's Brand Canada Library (CTC's digital asset management system).
- More than **900 b-roll video clips** of amazing Canadian destinations.
- More than **300 videos** and **2,000 still images** for the **social-media space** available on CTC's YouTube channel, Flickr website and image library.
- More than **one million views** of NADP social-media videos on CTC's YouTube channel, representing more than 40,000 hours of brand exposure. Data from CTC's Brand Canada Library shows 886 downloads in a period leading up, during and after the 2010 Winter Games (January to March 2010).
- Close to **600 Canadian travel-story ideas**, including more than 80 with an Olympic theme.
- **23 Canada-themed features**, developed in partnership with CTV, showing off every Canadian province and territory.
- All **13 provincial and territorial tourism marketing organizations** participated in the program – a first for Canada.

Source: CTC, 2010

Non-Olympic partners

In 2008 the CTC along with the Canada Border Services Agency (CBSA), developed the framework for the **Welcome to Canada Program**. The new look for international points of entry supported the awareness of the 2010 Olympic Games as "Canada's Games."

In 2009, by collaborating with 25 non-Olympic organizations, the CTC far surpassed its original target of four partners engaged beyond VANOC or Olympic sponsors. For example, the CTC joined forces with the Four Host First Nations—the Lil'wat, Musqueam, Squamish and Tsleil-Waututh Nations—to bring greater awareness of Canada's Aboriginal tourism experiences and to support development of Aboriginal cultural tourism programming.

Why can't we be more like Canada?

They host the Olympics like they mean it. They smile... and they have the Mounties! They have a kick-ass national anthem that says everything about who they are – and about what we, as Americans, are not.

—The Huffington Post

Phase 2: Media Relations

During the intense period of the Games—and with some 3.5 billion viewers around the world—we leveraged relationships established in Phase 1, and moved to a focus on media relations and web communications with a special emphasis on rights-holding broadcasters from our key markets.

Our media relations activities showcased refreshed Canada experiences and focused on influencing Games-time coverage of Canada by having CTC-developed assets used and broadcasted by international and domestic media.

Did you know?

The Vancouver 2010 Olympic and Paralympic Winter Games enjoyed the most extensive coverage ever produced for a Winter Games, reaching a record potential audience of 3.8 billion people worldwide. The International Olympic Committee (IOC) reported that 235 broadcasters and television stations covered the Games in 220 territories. The 2010 Winter Games were also a defining moment in Olympic broadcasting history, being the first Winter Games to be fully embraced on new media platforms, as rights holders and broadcasters increasingly sought to augment traditional media coverage with online content and streaming.

CTC's Media Relations Programs

The driver of success during our Media Relations phase was our innovative programming, which had tremendous media appeal.

The **Connecting with Canadians** program was established to leverage increasing international media and consumer interest in the Winter Olympic Games and athletes. Led by the CTC with support from provincial and territorial tourism partners, the program offered authentic Canadian tourism experiences to athletes and their families prior to the 2010 Winter Games.

International athletes such as Lee Kyou Hyuk, a popular South Korean long-track speed skater, and the Chinese Women's Curling Team participated in the program. During their stay in Canada, a TV crew followed their adventures and documented their travel experiences. The resulting assets included high-definition video, photographs and YouTube documentaries that were made available to international media in CTC's markets and were used extensively before and during the Games.

The **Connecting with Canadians** program was successful in leveraging media attention and generating international media coverage. For example, South Korea's SBS-TV documented Lee Kyou Hyuk's trip in Canada and aired a full documentary of it in January 2010; it also used footage in its sports reporting in the months leading up to the Games.

2010 Winter Games presented a prime-time opportunity to promote Aboriginal tourism

The CTC identified Aboriginal tourism as a key tourism focus with growth potential in international markets. Aboriginal tourism has a strong correlation with Canada's tourism brand: both are predicated on storytelling and experiential travel. CTC research indicates that travellers across CTC markets are motivated to include Aboriginal cultural experiences, celebrations and attractions in their travel plans. Interest is particularly high in the UK, Germany and France.

To augment awareness of Aboriginal cultural tourism in global markets, the CTC partnered with Aboriginal Tourism Canada in 2007 to identify the "significant 28" Aboriginal Cultural Tourism experiences.

In 2008, the CTC and the Four Host First Nations (FHFN) signed a Statement of Cooperation in recognition of their common interests in leveraging worldwide media interest surrounding the 2010 Winter Games to raise awareness of outstanding Aboriginal tourism experiences across the country. This was the first time that Indigenous Peoples were recognized as full partners in an Olympic and Paralympic Games by the International Olympic Committee.

Upon this foundation, the CTC and FHFN agreed to collaborate in promoting Canada's Aboriginal tourism experiences through the 2010 Winter Games by developing a unique program to promote Aboriginal history, culture, business and tourism as a feature of the Aboriginal Pavilion. The program included development of an interactive multimedia display system, with devices located at the Pavilion and other venues during the Games.

The CTC produced video vignettes of the 28 significant Aboriginal tourism experiences as content for the multimedia displays. The CTC also contributed video content for the signature show, "We Are Here," a video production celebrating Aboriginal history, culture and tourism that was projected nightly on the Pavilion's giant sphere throughout the Games.

In addition, the CTC leveraged Games-time media to raise international awareness of Aboriginal cultural tourism. The CTC and FHFN joined forces to produce a unique public ceremony to welcome the Olympic Torch upon its arrival at the Pavilion on February 12, 2010. The torch ceremony included a unique First Nations blessing and special welcome from the Chiefs of the FHFN and Buffy Sainte-Marie, the celebrated Academy Award-winning Aboriginal Canadian singer-songwriter. Aboriginal drummers, dancers and singers performed throughout the afternoon. CTC's Media Relations Team hosted international media, including SBS (South Korea) and NBC (USA) as special guests of the event. Media were given special access to VIP zones to cover the flame blessing event, and provided with messaging on Aboriginal tourism experiences. Media focus on the event was aided by CTC's broadcast footage available to broadcasters locally and globally.



A large crowd gathers in downtown Vancouver for the Four Host First Nations flame blessing ceremony.

Internationally, our partnership with the CTC is looked at as a model for aboriginal tourism.

—Tewanee Joseph, President & CEO Four Host First Nations

Torch relay set games interest alight

There may be no stronger spirit of connection with the 2010 Winter Games than carrying the Olympic Flame as it made its way across Canada. The CTC challenge: to leverage marketing opportunities to an international audience on the strictly domestic Olympic Torch Relay.

We decided to bring the world to Canada.

In partnership with VANOC, the CTC developed the Torch Relay International Media Program to maximize international media coverage of the relay, spread Olympic excitement around the world and promote Canada's extraordinary tourism experiences.

CTC invited 14 celebrities and Olympic personalities from our key international markets to participate in the relay as well as to engage in local Canadian experiences. Celebrity torchbearers included Akshay Kumar, renowned Bollywood actor and Indian celebrity; NBC announcer and former tennis champion Mary Carillo; and Anna Maria Kaufmann, an opera star in Germany, among others.

Each torchbearer's journey through the Canadian landscape was broadcast and shared in his or her home countries during the Vancouver 2010 Olympic Torch Relay and again during the 2010 Winter Games, captivating new international audiences and inspiring them to book a trip to Canada.

Before the relay, the torchbearers spent some time in the areas of their torch route to enjoy local tourism experiences and to connect with Canadians. As the international torchbearers were well-known and popular in their home countries, it was expected that their home media would cover their relay run and their corresponding tourism experiences. Millions of people around the world heard about and saw uniquely Canadian cities and landscapes, and learned more about Canada and its tourism possibilities.

The program was successful in generating international media coverage with over 309 million international media impressions (number of times that individuals in CTC markets were exposed to print or broadcast story related to CTC's Olympic Torch Relay International Media Program) worth over \$4.5 million in advertising value for the CTC.

It was maybe the coolest experience of my life, Oprah.

—NBC Today host Matt Lauer speaking on Oprah about his Torch Relay experience

Right: Matt Lauer, NBC Today Show host and 2010 Olympic Torch Relay participant from New York, USA, runs with the flame in Burnaby, BC, while participating in the 2010 Torch Relay International Media Program.



Our Media Relations Targets and Results

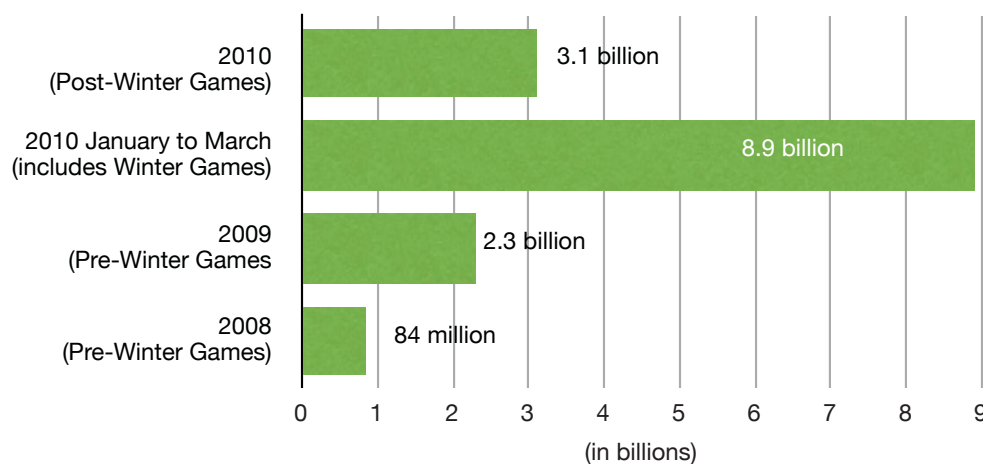
CTC played a significant role in putting stunning video shot from coast to coast to coast, images and stories about Canada in the hands of international broadcasters, helping to position Canada on the global stage during the Games. Reaching audiences through television programming, particularly live event programming, was a powerful influence on CTC target consumers. For example, the clip featuring Manitoba's polar bears aired to an estimated 20 million viewers during NBC's primetime Olympic coverage on February 15. Frontiers North said it received an intense increase in interest, with its website receiving about 2,500 hits in one day, up from the average of 200 to 300. Frontiers North also confirmed 15 bookings as a result of the deluge of calls and website visits.

Canada became the first country to integrate tourism experiences into the media coverage for global broadcast outlets. Leading up to and during the Games, the CTC distributed more than 20 Olympic-related packages with video, photos and storylines that focused on athletes' and international torchbearers' trips to Canada. CTC's b-roll was even used by NBC, the US rights-holding broadcaster, to promote the Vancouver Winter Games during its Super Bowl coverage. With 100 million viewers, the Super Bowl spot alone was worth an estimated \$4.5 million in prime-time advertising exposure.

Measure	2010 Target	2010 Result	Trend
Audience reach on Olympic Games and Canada tourism media	2.4 billion	12 billion	Target surpassed
Advertising value	\$5 million	\$1.0 billion	Target surpassed

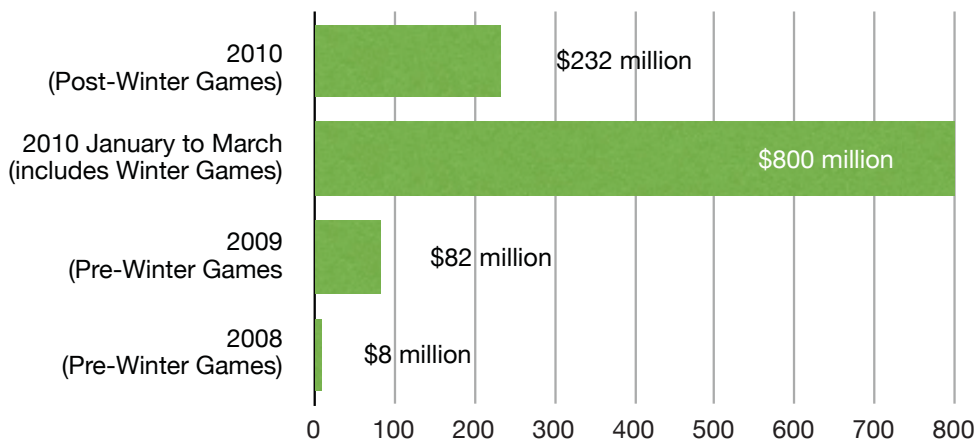
The CTC surpassed performance targets in leveraging the media exposure from the 2010 Winter Games to generate awareness of Canada as a vacation destination. From January 1 to March 31, 2010 (the period immediately before, during and immediately after the 2010 Winter Games), the audience reach (number of times that individuals were exposed to 2010 Winter Games messages that were influenced by the CTC) was 3.8 billion for print publications and 5.1 billion for broadcast, for a total of 8.9 billion impressions. By June 2010, global audiences were exposed to Canada's tourism messages 12 billion times. This significantly surpasses CTC's target of 2.4 billion. The audience reach of our material amounted to an advertising value of \$1.0 billion.

Audience Reach in CTC markets covering both Canadian tourism and the 2010 Winter Games



The CTC also had considerable success in raising our corporate profile through Olympic media coverage. We exceeded our original target of 60 associations and/or mentions of the CTC regarding the Olympic Games by 849 mentions in 2009. And we garnered another 242 domestic media mentions between January and March 2010.

Ad equivalency resulting from coverage of Canadian tourism and the 2010 Winter Games in CTC markets



Leverage Canada's experience as Olympic host to generate Meetings, Convention and Incentive Travel (MC&IT) sales

As part of our Olympic Games tourism strategy, the CTC promoted MC&IT, the highest yield travel segment. The CTC leveraged existing partnerships with meeting planning associations—such as the American Society of Association Executives, the Center for Association Leadership, plus the Professional Convention Management Association and Meeting Professionals International—to market Canada as a country with state-of-the-art media, convention, meeting and sports facilities and with experience executing world-class international events.

During the Games, the CTC hosted presidents, CEOs and executive directors representing more than \$10 million in potential business over the next 5 years, in order to build high-level relationships with these influential senior executives and to show Canada as a first-rate meeting destination. CTC reinforced the message that “Canada has the infrastructure, quality and unique attributes to host the world.”

The programming gave the most senior meeting planning professionals and decision-makers a “Behind the Scenes” look at what it takes to host the world’s most high-profile and complex event. With the message, “If we can host an event of this calibre successfully, we are the perfect country to host your meeting/convention/ event,” the CTC sought to market both Canada and the CTC as experts in the MC&IT realm. The program was facilitated by one of the CTC’s strategic platform partners and as a result, participating clients received education credits to be applied toward industry meeting planning designations.

The *Behind the Scenes* program was so successful that it has become an Olympic Legacy piece for the CTC and the *Behind the Scenes* format has been utilized with other significant events such as the G8/G20 Summit and the Toronto International Film Festival. To date, the CTC has secured almost \$14 million in tentative business leads and \$1 million in definite business for Canada.

Phase 3: Harvesting the afterglow and “closing the sale”

The third phase of our Olympic strategy focuses on harvesting the “afterglow effect” by sustaining the intrigue and interest that has been generated around the 2010 Winter Games and extending it to new travel experiences across Canada.

The CTC is working with partners to target consumers and convert their interest in Canada into travel intentions with a focus on “closing the sale,” moving the strategy from a brand-building phase to sales that harness the post-Games afterglow.

Conversion campaigns have already been activated to drive bookings to Canada. The thrust of this effort is to ensure that the supply of sellable experiences is available to match the demand. Specific initiatives include:

- Direct-to-consumer advertising campaigns with an emphasis on tactical messages that include urgent calls-to-action and price points.
- A key account program to ensure that we are working with tour operators in our markets that are in the best position to sell Canada and convert high-yield customers. The program includes tour operator training, as well as online Canada Specialist training for travel agents.
- Small and medium-sized enterprise (SME) outreach program to align Canadian tourism experiences with the CTC.



Make no mistake, Canada's people were the stars of these Games. They jammed the streets of Vancouver, cheered the most obscure sports as long as a Canadian was competing and all but drowned themselves in a sea of red. They found their voice here.

—Chicago Sun Times

Progress against CTC's Olympic Games tourism strategy outcomes

Increased impact of the 2010 Olympics on interest in visiting Canada

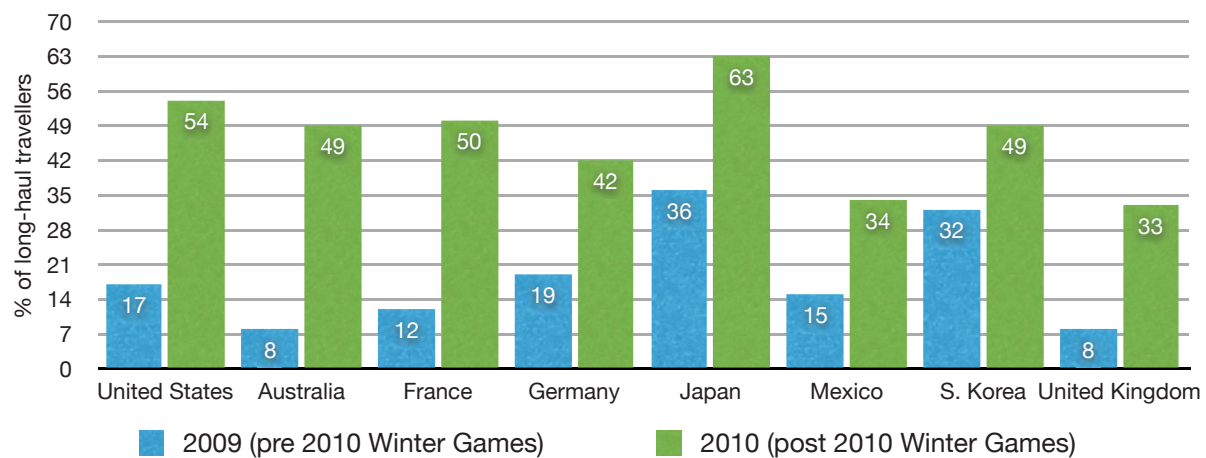
Interest in Canada boosted by Games

Research undertaken for the CTC in time for the first anniversary of the Games confirms that the event had a positive impact on our key markets. A survey conducted for the CTC by a third party reveals a significant, positive shift in travellers' inclinations to visit Canada because of the 2010 Winter Games and that the increase in interest for Canada was sparked by the broad broadcast of the 2010 Winter Olympic Games and Canada's tourism message.

Long-haul international travellers in CTC markets were asked before and after the 2010 Winter Games if they recalled promotional materials or advertising about the 2010 Olympic host—Canada—as a great travel destination. The result was a significant increase in all CTC markets, with an average increase of 18% to 47%.

Those who recalled the advertising were also asked if the information inspired them to visit Canada in the future.

Recall of promotional material or advertising about the 2010 Olympic Host—Canada—as a great travel destination



Source: Advertising Tracking Studies in CTC markets, Insignia Research, 2009 and 2010.

Among those who recalled promotional materials about the 2010 Olympics and Canada as a tourism destination, 41% of travellers in CTC markets indicated that the information inspired them to want to visit Canada in the future. Interest to visit Canada resulting from the coverage of the Olympics was highest in Japan (+ 62.5% over 2009) and South Korea (+28.6% over 2009).

Successful post-Games advertising campaigns

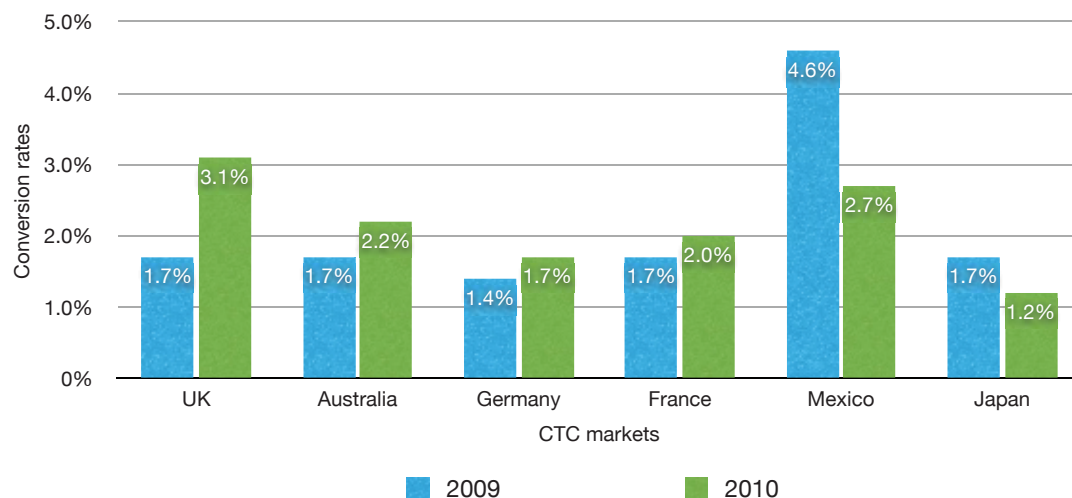
Despite a subdued economic environment that continued to prevail in certain CTC markets in 2010, and strong competition from other tourism destinations, the success of the 2010 Olympic and Paralympic Winter Games and a strong five-year tourism plan (2008 to 2012) saw the CTC maximize every tourism opportunity in 2010 to increase overall visitation to Canada.

Results of conversion studies conducted for the CTC link recall of CTC direct-to-consumer advertising to real travel plans, and demonstrate that the CTC's Olympic tourism strategy was successful in leveraging the Winter Games to create awareness of Canada as a travel destination and converting this awareness into visitations. The studies track the impact of CTC tourism marketing campaigns around the time of the 2010 Olympic Games in countries where the CTC invests.

Consumers in CTC markets were tracked along a "path to purchase"—from their ability to recall CTC advertising to their booking or taking a trip to Canada. The 2010 conversion studies results from CTC's European markets demonstrate the success of CTC's campaigns in converting more visitors when compared against 2009 campaigns.

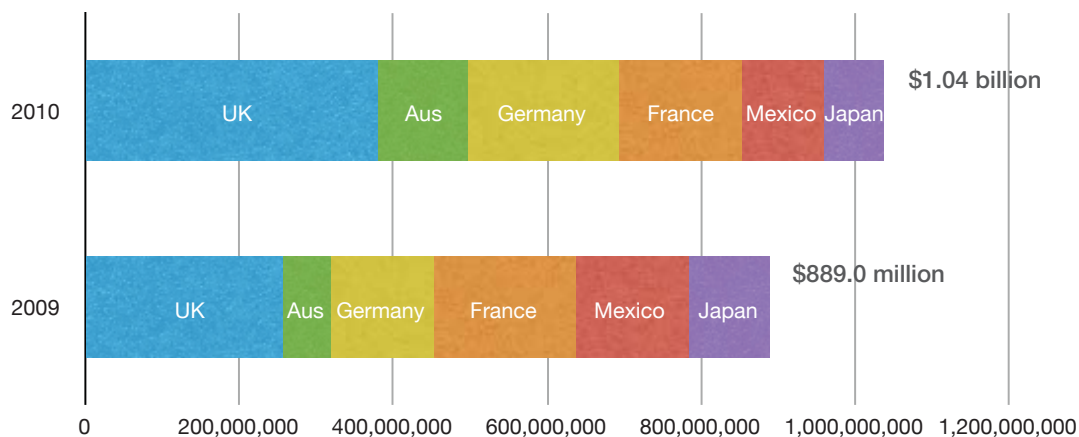
Results from Asia/Pacific demonstrate that Australia posted a significant increase in visitations vis-à-vis 2009, while Japan posted a slight decline. Mexico's decrease in conversion and visitation (from 4.6% in 2009 to 2.7% in 2010) is likely a result of the visa restrictions imposed in 2009.

CTC advertising Campaigns - pre and post 2010 Winter Games Conversion Rates



To date, CTC's post-Olympic marketing campaigns have generated an estimated \$1.04 billion tourism export revenues for Canada, up 17% or \$148 million from 2009. This translates to approximately 9,200 jobs created or maintained for the Canadian tourism industry.

Tourism Export Revenue attributable to CTC's marketing campaigns



Source: Conversion Studies in CTC markets, Insignia Research, 2009 and 2010.

Summary of CTC's 2010 campaigns

United Kingdom Spring Campaign

The UK campaign ran between January 18 and April 4, the period leading up to, during and after the 2010 Winter Games. As a result of the campaign, more than 290,000 British travellers were inspired by to book a flight to Canada—almost twice as many as in 2009 and three times more than in 2008. The campaign generated an estimated \$379 million in tourism export revenues, up from \$256 million in 2009.

Germany Spring Campaign

The Germany campaign ran between January 18 and April 17, though it was suspended during the Games. More than 128,000 German travellers booked a trip to Canada, up from about 91,000 in 2009. The campaign generated an estimated \$196 million in tourism export revenues, \$61 million more than in 2009.

France Spring Campaign

The France campaign ran between March 1 and April 17, converting an estimated 2% of long-haul French travellers, up from 1.71% in 2009. Over 121,400 travellers booked or took a trip to Canada, generating an estimated \$160.3 million in tourism export revenues.

Australia Spring Campaign

The Australia campaign ran between January 10 and April 4, the period leading up to, during and after the 2010 Winter Games. Over 70,000 Australians moved from considering a trip to Canada to making a firm booking in 2010—almost twice the 2009 number. The campaign generated an estimated \$117 million in tourism export revenues, \$55 million more than in 2009.

Mexico Spring Campaign

Mexico's spring campaign was less successful at converting Mexican travellers than in 2009. Although media spend in 2010 was 2.6 times greater than in 2009, the proportion of long-haul travellers highly influenced by CTC advertising decreased from 28% to 17% (to 74,284 travellers) and generated an estimated \$106.6 million in tourism export revenues. A portion of this decrease was likely a result of the visa restrictions.

Japan Spring/Summer Campaign

The Japan campaign ran from May to July 2010. The conversion studies results point to a successful campaign that converted an estimated 1.2% of long-haul Japanese travellers, slightly down from 1.7% in 2009. Almost 52,000 travellers booked or took a trip to Canada as a result of the campaign, generating an estimated \$78 million in tourism export revenues.

Tourism begins the road to recovery

Thanks in part to the success of the 2010 Winter Games, tourism to Canada showed signs of recovery in 2010 after the 2009 global recession, coupled with the spread of the H1N1 virus and related health concerns, resulted in a poor year for the Canadian travel and tourism industry.

While December 2010 visitor statistics are not yet available, year-to-date November 2010 data confirms that 2010 was a good year for tourism in Canada. International travellers made 15.1 million trips to Canada through November, a 2.3% increase over the same period in 2009.

In addition, despite a subdued economic environment that continued to prevail in certain CTC markets in 2010, visitor arrivals to Canada in CTC's overseas markets are estimated to have increased by 9.7% in 2010, while those from the Americas (US and Mexico) were stagnant at 0.2%

There were notable increases in arrivals from Brazil (+29.9 %), South Korea (+19.5%), Japan (+20.3%) and China (+21.4 %).

Overnight travel to Canada from CTC's markets



Statistics Canada, "Travel between Canada and Other Countries", ITS November 2010.

According to the Conference Board of Canada, Canada's tourism industry is set to deliver solid growth through 2014. Some challenges will prevail going forward: the subdued US economic environment, the strengthening Canadian dollar, the debt crisis in Europe, and intense competition from other destinations.

Accelerated awareness of Canada's tourism brand in CTC markets

Canada Becomes the Number One Country Brand in the World for 2010

The Olympic Games presented an unparalleled opportunity for country brand building, and opportunities to reach audiences on a global scale with images and stories of host country. While media exposure is guaranteed, improving country brand strength in this context is not; effective leverage depends on making a strong connection between the event and the differentiating features of the host country brand.

In 2010 Canada became the number one country brand in FutureBrand's 2010 Country Brand Index (CBI), moving up one place from 2009. The CBI examines how countries are branded and ranked according to key criteria, and identifies emerging global trends in travel and tourism.

While various factors influence Canada's ranking on the CBI, the consistent improvement over time can be attributed to CTC's rigorous approach to tourism brand building and the strong promotion efforts to showcase Canada as a premier travel destination.

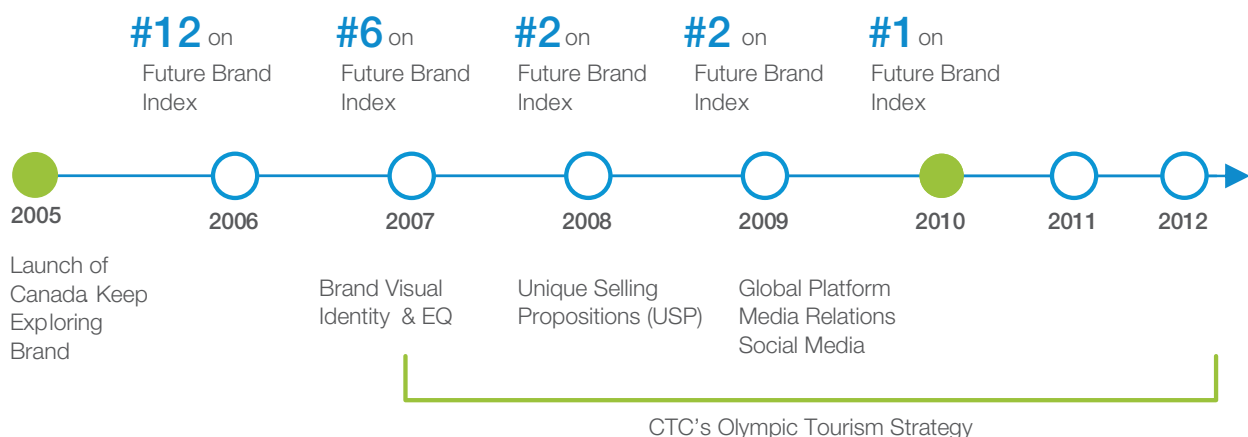
Brand Canada's journey to success and the number one ranking has been part of a long-term strategy to reinforce Canada's unique assets through tourism marketing. In 2006, as the CTC prepared to roll out Canada's revitalized tourism brand, the CBI ranked Canada 12th. After the launch of Canada's new tourism brand visual identity in January 2007, and following a year of exposure, the CBI 2007 ranked Canada sixth and specifically praised Canada's revitalized tourism brand and the CTC's consumer website for differentiating Canada in the global tourism marketplace. In 2008, after the full articulation of the revitalized brand had taken root, Canada was ranked second out of 78 country brands. In 2009, Canada maintained its second-place position.

This rise in Canada's ranking demonstrates both the salience of Canada's revitalized tourism brand and the role of our international marketing campaigns in differentiating Canada in the global tourism marketplace. In addition, the opportunity to leverage Canada as host of the Vancouver 2010 Olympic and Paralympic Winter Games contributed greatly to awareness of Canada as an international tourism destination and played a significant role in securing Canada's first-place rank on the CBI 2010.

Highlights from the 2010 Global Tourism Watch Survey

- Unaided awareness of Canada as a tourism destination increased an average of 7.5% across the markets surveyed, with notable gains of 28.6% in the UK and 13% in Australia.
- The percentage of international travellers who are considering a trip to Canada increased by an average of 7.6%, with notable gains of 27% in Australia and 33% percentage in UK.
- Awareness of advertising for Canada increased an average of 6.4% across the markets surveyed.

Source: Global Tourism Watch, HarrisDecima research 2010



Canada Brand Valuation: Solid post-2010 Winter Games growth

Having a strong tourism brand is essential to enticing visitors to Canada. The average role of brand for visitors in Canada's core markets is 63%, meaning that compared to other criteria, such as price and convenience, brand is the most important driver of leisure travel to Canada (*Valuing Canada's tourism brand, Interbrand 2010*).

Brands have a monetary value and are a crucial asset of any enterprise. In 2008, the CTC undertook an initiative to value and benchmark Canada's tourism brand in advance of the Olympic investment and then to measure its growth in value through the Olympic strategy period.

Interbrand, the world's leading expert in brand valuation and brand management, leveraged CTC's world-class research and business intelligence and applied its brand valuation methodology to establish the value of Canada's tourism brand.

Canada has a highly valuable tourism brand. Benchmarked in 2007 at \$123 billion, its worth is in line with many of the world's most valuable brands such as Walmart (\$130 billion) and far exceeds the 100% Pure New Zealand tourism brand (estimated at \$17.2 billion in 2005). The value of Canada's tourism brand for 2010 is **\$132 billion**, a 7.2% increase compared to the pre-Olympics valuation.

The biggest increase in Canada's brand value came from China, which experienced a post-Olympic Games brand value increase of 67%. Other markets, which also grew significantly, were France, Germany and Australia (see chart below). This year also marked the re-emergence of Japan, which, after years of steady decline, grew 26% (\$450 million).

Despite performing solidly in brand strength, Canada's brand value in the UK fell 32%, primarily due to weaker financial forecasts in that country. The biggest decline was reserved for Mexico, which, largely influenced by the introduction of Canadian visa requirements for Mexican travellers, experienced a 71% brand-value drop compared to its pre-Games level.

Pre-Olympics versus Post-Olympics performance

	% Change in Brand Value Pre- Olympics Games vs. Post- Olympics Games	% Change in Brand Value (C\$M) Pre-Olympics Games vs. Post-Olympic Games
China	67%	\$1,382
France	50%	\$1,910
Australia	30%	\$4,296
Germany	21%	\$596
Japan	26%	\$450
USA	9%	\$6,550
S.Korea	3%	\$59
UK	-32%	\$ (3,547)
Mexico	-71%	\$ (3,428)
ROW	+24%	\$3,849
Total	7.2%	\$8,818


By 2010, the CTC had invested \$19 million of its Olympic funding to leverage Canada as a tourism destination. The CTC Olympic Games tourism strategy within the context of its marketing effort to promote Canada as a tourism destination is likely to have a direct impact over the attributes influencing the strength of Brand Canada. These attributes include the stability of the brand, as represented by the awareness of Canada as a tourism destination and the level of interest in taking a trip to Canada, its leadership position, particularly in value perceptions, and how the brand is supported through effective marketing, industry recognition and product diversity.

Fundamentally, the CTC marketing programme has varying degree of influence on each of the attributes influencing brand strength. Each of these attributes generate value to the brand. A proportion of the 2010 incremental brand value originating from the brand strength is the result of the \$19 million the CTC used from its Olympic funds.

The Brand Valuation study completed by Interbrand for 2010 evaluated the incremental value of the Canada Brand over its pre-Olympic value in 2007 at \$8.8 billion, of which \$2 billion (27%) was directly attributable to CTC's marketing activities, including its Olympic contribution. The \$19 million from Olympic funding invested generated \$425 million in Brand value, or 21% of CTC's total contribution to the Canada Brand incremental value.

Legacies to Date

1. 2010 Tourism Consortium, a model of how to work together as the host tourism destination marketers (BC, Canada, Vancouver, Whistler and Richmond).
2. National Tourism Marketing Working Group, a model of how to leverage the Games opportunity nationally through such programs as Connecting to Canadians and Torch Relay.
3. CTC's work with Four Host First Nations and with Aboriginal tourism operators across Canada through the Aboriginal Tourism Experiences Program, a model of how to engage Aboriginal communities and Aboriginal tourism organizations.
4. National Asset Development Program, a pan-Canadian collaboration and investment that resulted in an inventory of digital assets on Canada and all its provinces and territories.

A woman with short brown hair, wearing a black turtleneck, is being interviewed. She is holding a blue microphone with the SBS logo and the Olympic rings. In the background, there are wooden slats and some decorative items, including a hat and a piece of art with a face. A large green quotation mark is visible on the right side of the text box.

If there is one lesson I would strongly urge other nations to take on board, it would be to avoid the trap of thinking that you are there to promote the Games themselves. You need to understand that tourism is about the whole country and it takes time to build the content. Start early and think of the legacy.

—CTC President Michele McKenzie,
WTM Business Magazine, 2010

Results Summary

The long-term impacts of hosting the Olympics are not yet known. It takes most Olympic cities years to recognize the full benefit of holding the Games. Destinations like Turin and Beijing all are still deriving the benefits of hosting Olympic Games. So while it is too early to determine the extent to which the 2010 Winter Games contributed to the Canadian tourism industry, the results achieved by the implementation of the CTC's Olympic Games Tourism Strategy are significant.

This interim report demonstrates the following outcomes that have been achieved to date from the Government of Canada's \$26 million investment in the CTC as part of its Olympic Tourism Strategy:

- Largely due to the positive effects of hosting the 2010 Winter Olympics in Vancouver and the CTC's Olympic Games Tourism Strategy, Canada took the No. 1 spot in the FutureBrand 2010 Country Brand Index (CBI).
- CTC's Olympic Games Tourism Strategy contributed to a 7.2% increase in Canada's tourism brand valuation. In 2010, the value of Canada's tourism brand increased from approximately \$123 billion to \$132 billion, generating \$8.8 billion in additional brand value.
- The CTC's Olympic media and public relations program generated an additional \$1.0 billion in advertising value for the CTC in 2010, and global audiences were exposed 12 billion times with 2010 Winter Games and Canada tourism messages that were influenced by the CTC.
- Despite a subdued economic environment that continued to prevail in certain CTC markets in 2010, visitor arrivals to Canada in CTC's overseas markets are estimated to have increased by 9.7% in 2010 (*CTC Research and Statistics Canada*).
- CTC's 2010 advertising campaigns generated \$1.04 billion in tourism export revenues, up 17% compared to 2009 (*Conversion Studies in CTC markets, Insignia Research 2009 and 2010*).
- Between 2009 and 2010, awareness Canada as a tourism destination increased an average of 7.5% across the markets surveyed, with notable gains of 28.6% in the UK and 13% in Australia.

Research and Evaluation Sources

CTC uses third-party evaluation for its work. The following sources have been used to draft this report:

1. *Global Tourism Watch*, Harris/Decima, 2010
2. *Country Brand Index 2010*, FutureBrand
3. *Valuing Canada's tourism brand*, Interbrand 2010 (preliminary results)
4. *Advertising Tracking and Conversion Studies in CTC markets*, Insignia Research, 2009 and 2010
5. *Data to estimate CTC's Advertising Value and Audience Reach generated from CTC in-market media analysis, third party sources such as Media Miser in the US*, as well as data from key broadcasters, 2008-2010
6. *International Travel Survey*, Statistics Canada, November 2010.

CTC's Olympic Dashboard

				2008		2009		2010	
CTC Unit	#	Measure	Unit	Target	Result	Target	Result	Target	Result
Research	1.1 Objective: Enhance brand impact								
	a	Unaided awareness of 2010 Olympics host destination	%	--	17.0	17.2	24.8	30.0	N/A (1)
	b	Impact of 2010 Olympics on Interest in visiting Canada	%	--	40.2	40.8	39.5	42.5	N/A (1)
	1.2 Objective: Refresh tourism brand positioning								
	a	Aided brand awareness	%	55.8	46.4	57.0	43.9	50.0	44.7
	b	Unaided brand awareness	%	19.1	14.2	20.0	13.0	15.0	13.9
Media and Public Relations	2.1 Objective: Maximize media return on investment								
	a	PR impressions (audience reach) in CTC markets covering both Canadian tourism and the 2010 Winter Games (print)	#	2.0 million	84.1 million	98.0 million	592.4 million	1.9 billion	3.9 billion
	b	PR impressions (audience reach) in CTC markets covering both Canadian tourism and the 2010 Winter Games (broadcast)	#	--	--	--	1.709 billion	454.7 million	8.1 billion
	c	Ad equivalency value in CTC markets covering both Canadian tourism and the 2010 Winter Games (print)	\$	\$500K	\$8.2 million	\$4.5 million	\$82.4 million	\$95.0 million	73.9 million
	d	Ad equivalency value in CTC markets covering both Canadian tourism and the 2010 Winter Games (broadcast)	\$	--	--	--	--	Benchmark	958.6 million
	e	Media hosted in Canada	#	2,000	582	3,000	2,019	2,000	556
	f	Media provided with briefings and packaged information	#	500	557	3,500	22,629	11,000	29,398
	g	Stories/content covering all regions of Canada related to the torch relay route provided to media	#	--	--	10	17	16	309
	2.2 Objective: Manage Corporate Reputation								
	a	Associations/mentions of the CTC regarding Olympic Games	#	20	--	40	909	40	242
Finance	3.1 Objective: Leverage Partner Funding								
	a	Partner contribution	\$	\$1.0 million	\$0.92 million	\$4.0 million	\$11.3 million	\$5.0 million	TBD
Business Development	4.1 Objective: Strengthen and expand partner relationships								
	a	Non-commercial license agreement with VANOC	Yes/No	Yes	Yes	Yes	Yes	Yes	--
	b	Partner agreements with VANOC	#	2	2	1	2	0	1
	c	Partner agreements with international Olympic sponsors	#	0	0	2	2	0	--
	d	Other partners engaged (not VANOC or Olympic sponsors)	#	3	11	4	25	2	3
Meetings, Conventions and Incentive Travel (MC&IT)	5.1 Objective: Promote Meetings, Convention and Incentive Travel								
	a	Fam trips	#	--	--	--	--	2	2
	b	Non-Olympic sport organizers with summer and winter potential to select Canada identified	#	--	--	--	--	50	
	c	International tourism businesses and executives hosted in Canada	#	--	--	--	--	75	32
International Marketing	6.1 Objective: Harvest the Afterglow of the 2010 Winter Games								
	a	Key account gross sales attributable to Olympic funding	\$	--	--	--	--	--	--

Notes:

(1) Unaided Awareness of 2010 Host and Impact of 2010 on interest were removed from the 2010 GTW study due to budget reductions. A special study conducted at the end of February measured the influence of the 2010 Olympic Games on intentions to travel to Canada. The question, however, was positioned differently than in the GTW and respondents were only allowed to answer Yes, No or Don't know whereas the GTW study had a five-point answer scale with the top two boxes providing the positive response.



When the CTC first contacted me about composing a tribute poem to Canada, they sought something that truly captured the heart of our experience here. I tried to do that as well as I could. Performing poetry at the Opening Ceremonies of the Vancouver 2010 Olympic Games is a breathtaking honour.

*I hope it made
Canadians happy.*

—Shane Koyczan, poet,
“We Are More”, Opening Ceremonies



For more information about the CTC's work, visit www.canada.travel/corporate.

To see examples of the content that was created as part of the marketing strategy, visit any of the commission's dedicated sites:

- CTC travellers' site: www.canada.travel
- CTC Image Library: www.photovideo.canada.travel
- CTC video/photo story packages: <http://ctc.pathfireondemand.com>
- CTC Media Centre: <http://canada.travel/media>
- CTC Story Ideas: <http://mediacentre.canada.travel/media/story-ideas>
- CTC YouTube channels: www.youtube.com/canadiantourism
- CTC Flickr site: www.flickr.com/photos/canadiantourism

“ *In the end, these games became a testament to the resilience of both the Canadian and the Olympic spirit.*

—The Australian



