

CONFIDENTIAL

# 2023 GLOBAL TRAVELLER RESEARCH PROGRAM

## SYNDICATED REPORT

### JAPAN MARKET OVERVIEW

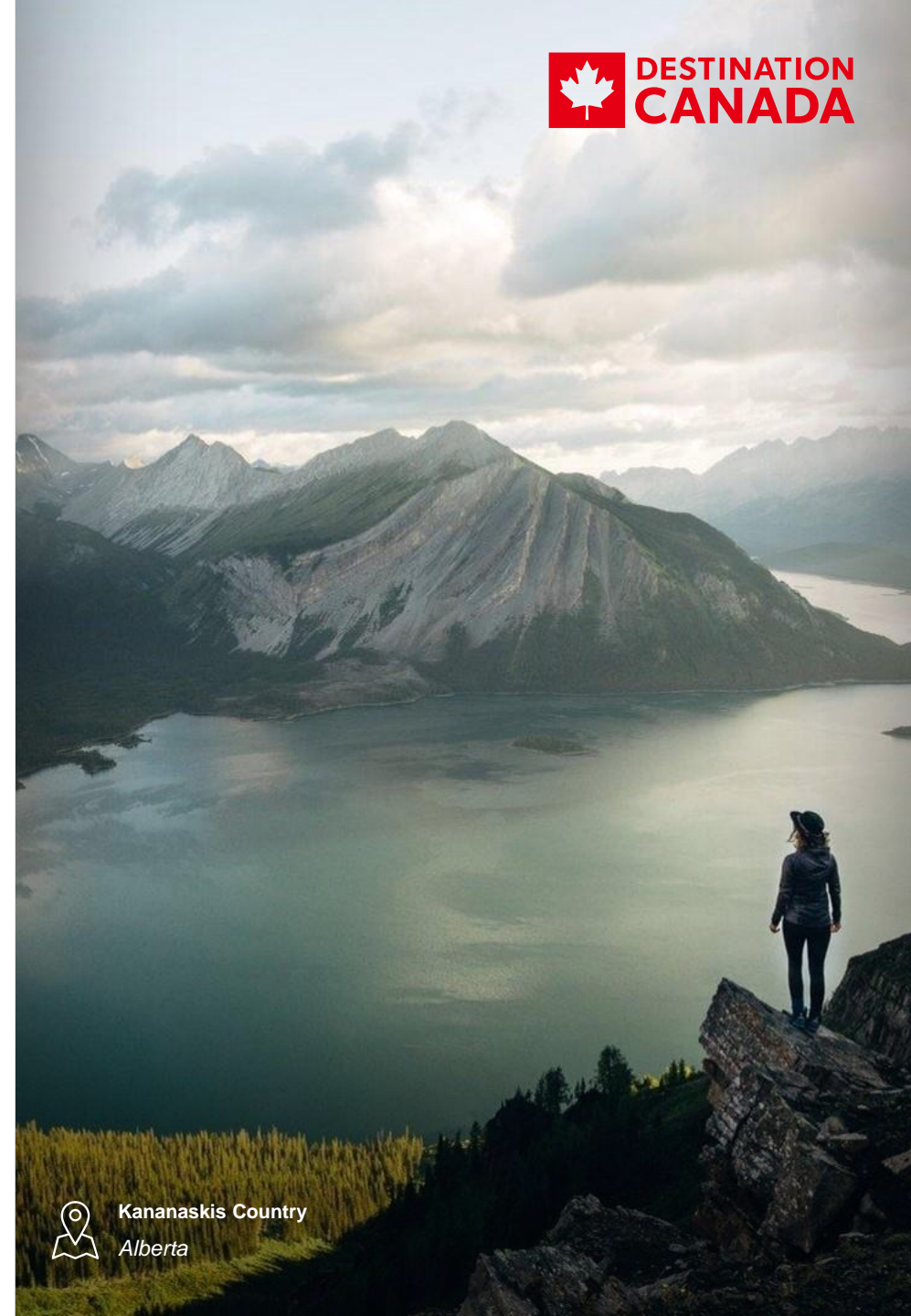


CANADIAN TOURISM DATA  
**collective**

# Japan Market Overview

***An annual view of the Japanese market to help understand general trends towards travel and how Canada fares against competitors on key destination brand metrics.***

Please note that the insights in this report are drawn from two of YouGov's proprietary syndicated data products, **YouGov Global Travel Profiles** and **YouGov DestinationIndex**. As a result, access to and sharing of this report and its underlying data are restricted to those within Destination Canada's organization and among organizations with access to the Canadian Tourism Data Collective (CTDC).



Kananaskis Country  
Alberta


## YouGov® Global Travel Profiles

YouGov Global Travel Profiles (GTP) surveys consumers daily in 30 key travel origin markets, to help travel & tourism organizations identify who is ready to travel when, where they want to go and what kind of trip they are planning.




**Survey Start in Japan**

October 23, 2020



**Methodology Notes**

Attitudinal statements are integrated into YouGov Global Travel Profiles platform from another YouGov study. These questions have lower sample sizes than other variables.



**2023 Base Sizes**

Sample distribution: **National 18+**

Total Japan: **5,558**



# Syndicated Product Overview




## YouGov<sup>®</sup> DestinationIndex

**YouGov DestinationIndex** is an always-on destination brand tracker. Daily data enables you to spot sentiment changes in real-time and take action, while measuring and benchmarking performance. Track public perception of Canada and other destinations across 16 brand metrics to track destination brand health, inform strategy, and ultimately influence travellers' perception of Canada.




**Survey Start in Japan**

October 31, 2019



**Methodology Notes**

Maximum of 30 destinations shown to any panel member at any given time, with sample split accordingly as more than 30 destinations are tracked. Destinations are added to the tracker on an on-going basis.



**2023 Base Sizes**

Sample distribution: **National 18+**

Total Japan: **5,786**





# Syndicated Product Overview



## YouGov® Destination Index

### 16 key metrics

#### Engagement: Media & communication metrics

- Advertising Awareness**  
1 Which of the following destinations have you seen an advertisement for in the PAST TWO WEEKS?
- Aided Awareness**  
2 Which of the following destinations have you ever heard of? Please select all that apply.
- Attention**  
3 Respondents hearing positive OR negative buzz about the destination.
- Buzz**  
4 Over the PAST TWO WEEKS, which of the following destinations have you heard something POSITIVE about (whether in the news, through advertising, or talking to friends and family)? Now which of the following have you heard something NEGATIVE about over the PAST TWO WEEKS?
- Word of Mouth Exposure**  
5 Which of the following destinations have you talked about with friends or family in the PAST TWO WEEKS (whether in-person, online, or through social media)?

5

#### Lower funnel metrics

- Purchase Intent**  
6 Which of the proposed destinations are you most likely to visit?
- Consideration**  
7 When you are in the market next to plan a vacation or a fun day out for yourself / your family, which destinations would you consider?
- Recent Visitor (Current Customer)**  
8 Which of the following destinations have you visited in the past 12 months?
- Former Visitor (Former Customer)**  
9 Which of the following destinations have you ever visited?

#### Destination / Brand health metrics

- General Impression**  
10 Overall, of which of the following destinations do you have a POSITIVE impression? Now which of the following destinations do you have an overall NEGATIVE impression?
- Visitor Satisfaction**  
11 Of which of the following destinations would you say that you are a "SATISFIED VISITOR"? Of which of the following destinations would you say that you are a "DISSATISFIED VISITOR"?
- Quality**  
12 Which of the following destinations do you think have a GOOD QUALITY? Now which of the following destinations represents POOR QUALITY?
- Value**  
13 Which of the following destinations do you think represents GOOD VALUE FOR MONEY? By that we don't mean 'cheap,' but that the destinations offer a visitor a lot in return for the price paid. Now which of the following destinations do you think represents POOR VALUE FOR MONEY? By that, we don't mean 'expensive,' but that the destinations do not offer a visitor much in return for the price paid.
- Reputation**  
14 Which of the following destinations do you regard as having a GOOD reputation for vacations? Now which of the following destinations do you regard as having a POOR reputation for vacations?
- Recommendation**  
15 Which of the following destinations would you RECOMMEND to a friend or colleague? And which of the following destinations would you tell a friend or colleague to AVOID?
- Index (Overall Destination Health)**  
16 Average of Impression, Quality, Value, Reputation, Satisfaction & Recommend



## Japanese have a strong preference towards domestic travel

- Only 10% of Japanese are planning an international vacation compared to 51% planning a domestic vacation
- Price of travel is the top travel obstacle which may be pushing even more towards domestic vacations
- Japan itself has an incredibly diverse offering which can deliver on many of the top destination choice influences such as overall value for money, natural beauty and low cost



- *To break through in this market, Canada could tailor strategies that emphasize unique offerings and experiences that cannot be had in Japan or the surrounding region*



## Long-haul destinations are struggling in Japan

- Despite international vacations trending upwards, scores for the long-haul competitive set remains low and trending down, suggesting international travel is largely short-haul
- Japanese are planning fewer trips than in years past
- Australia is the top scoring competitive destination, driven by strong reputation and impression scores



- *To attract Japanese long-haul travellers, Canada could emphasize availability of direct flights and its distinctive offerings compared to other long-haul destinations, positioning itself as a compelling choice for travel outside East Asia*



## When they reach and get settled at a destination, Japanese are willing to spend

- The majority of Japanese are excited to generally spend more when travelling
- Shopping trips are one of the preferred trips of Japanese
- But price of travel and accommodation are top travel obstacles, the latter reflected in the preference for hotels that are 3-stars or below
- Overall value for money and low cost are among the top three most mentioned destination choice influences



- *Emphasizing accommodation options that offer good value for money and showcasing diverse shopping opportunities could make Canada an attractive destination for Japanese visitors*



## Mass marketing can influence destination choice

- Travel websites, TV and social media are top advertising channels
- Recommendations from friends/family rarely influence destination choice
- However, given that Japanese are cautious risk averse, information from trusted friends and family are key to vacation planning




- *Leveraging mass marketing through prominent travel websites, TV, and social media channels could be crucial for influencing Japanese travellers, given the limited impact of recommendations from friends/family in destination choice*





# Japan Market Overview



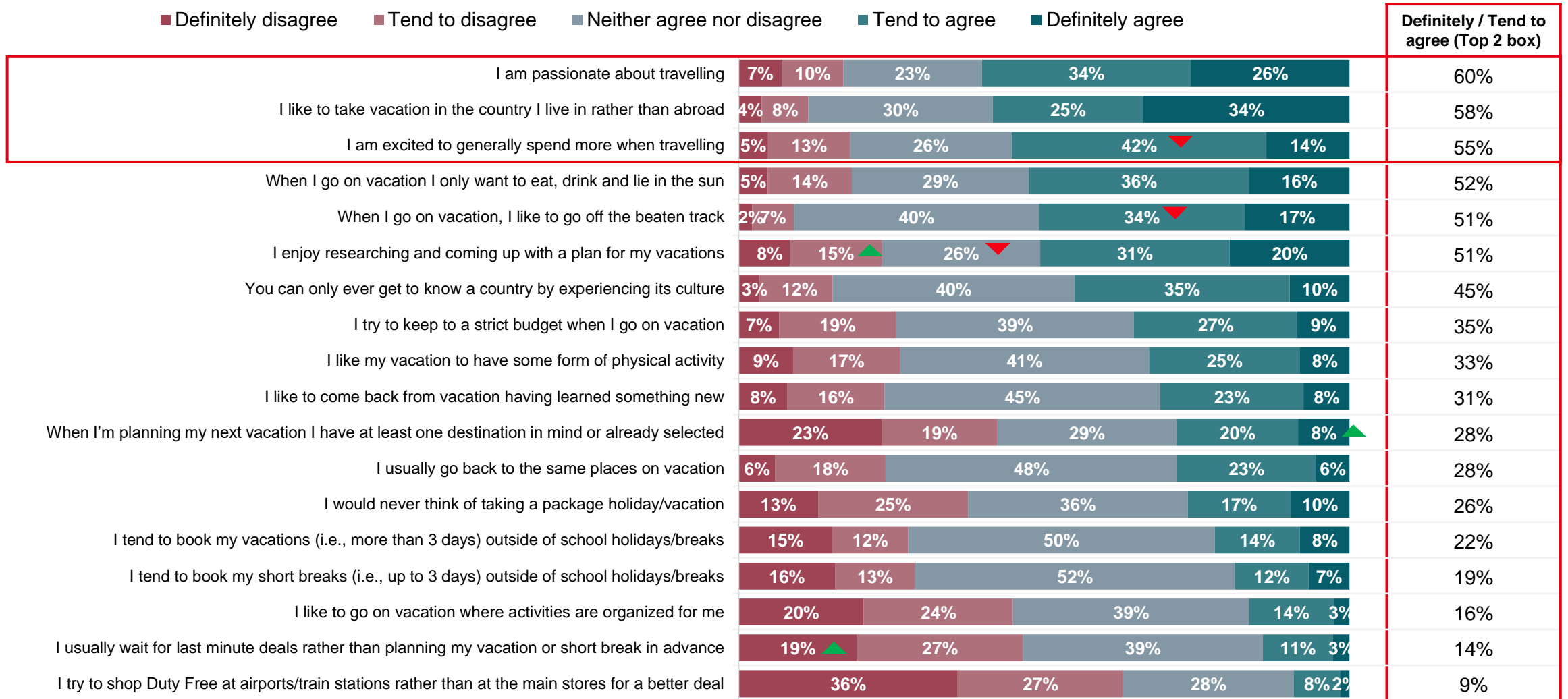
 Peggy's Cove  
Nova Scotia



# Attitudes Towards Travel



**Japanese are passionate about travelling and the majority are excited to generally spend more when travelling; however, Japanese have a strong preference towards domestic travel**





# Trip Types Planned in Next 12 Months

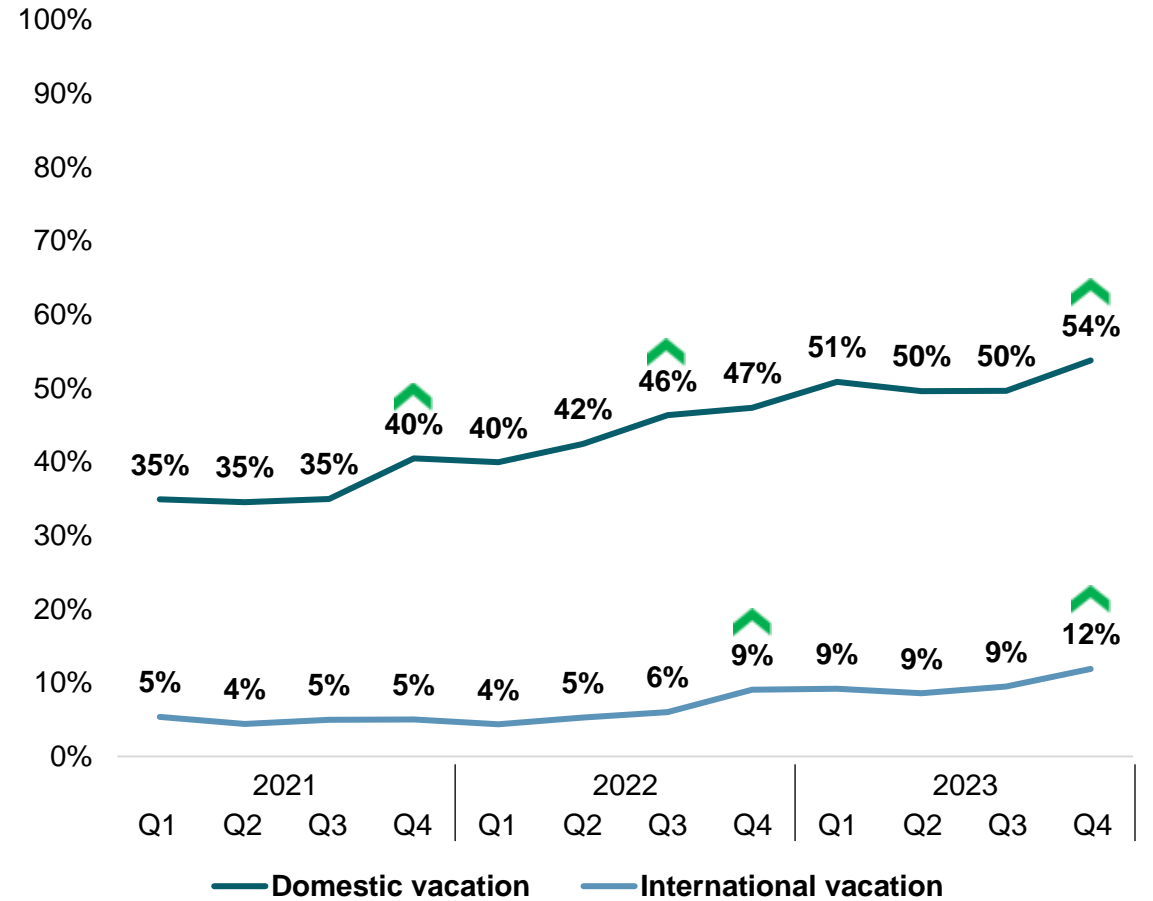


*In 2023, Japanese were five times more likely to be planning a domestic vacation over an international vacation. Domestic vacations have seen substantial growth coming out of the pandemic. International vacations have been slower to recover post-pandemic, first seeing growth in the second half of 2022 and no added growth until 2023 Q4*

### Trip Types Planned in Next 12 Months



### Vacation Trips Planned in Next 12 Months (Trended)



9 2023 Base: Japanese 18+ (n=5,558)  
 2021-2023 Quarterly Trending Base Range: Japanese 18+ (n=1,266-1,425)  
 Q: Which, if any, of the following trips are you planning to take in the next 12 months?  
 Please select all that apply.

▲ / ▼ = significantly higher/lower result (vs. 2022) | ▲ / ▼ = significantly higher/lower result (vs. previous quarter)

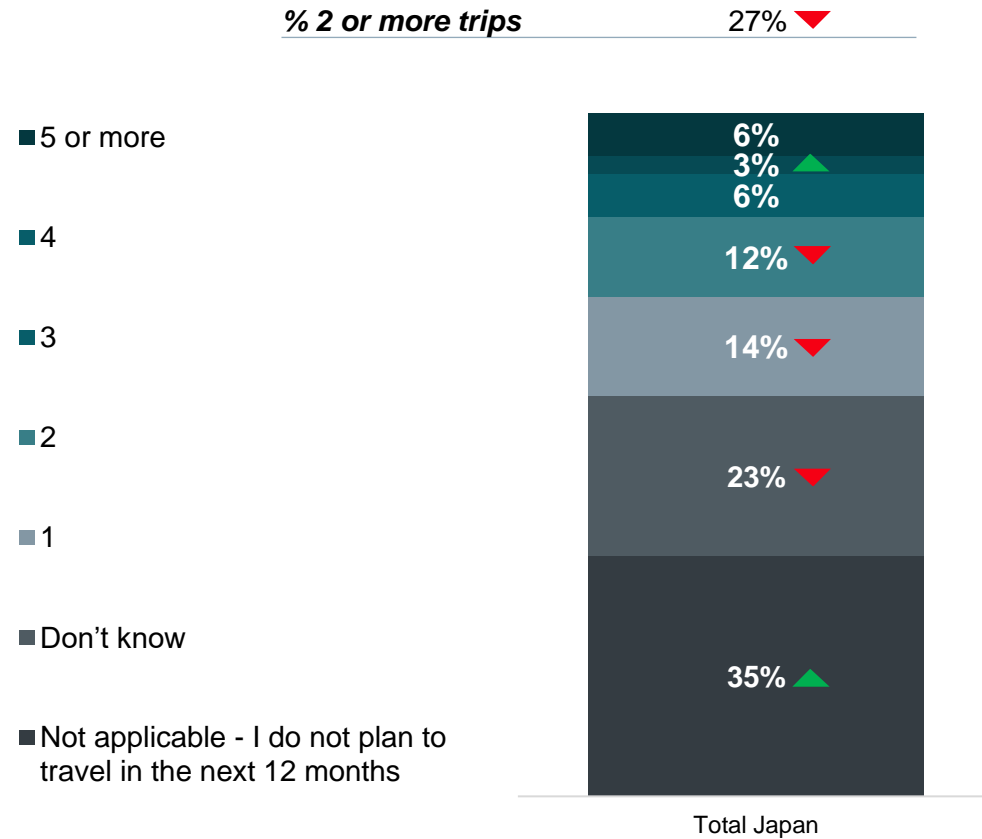


# Number of Trips Planned in Next 12 Months

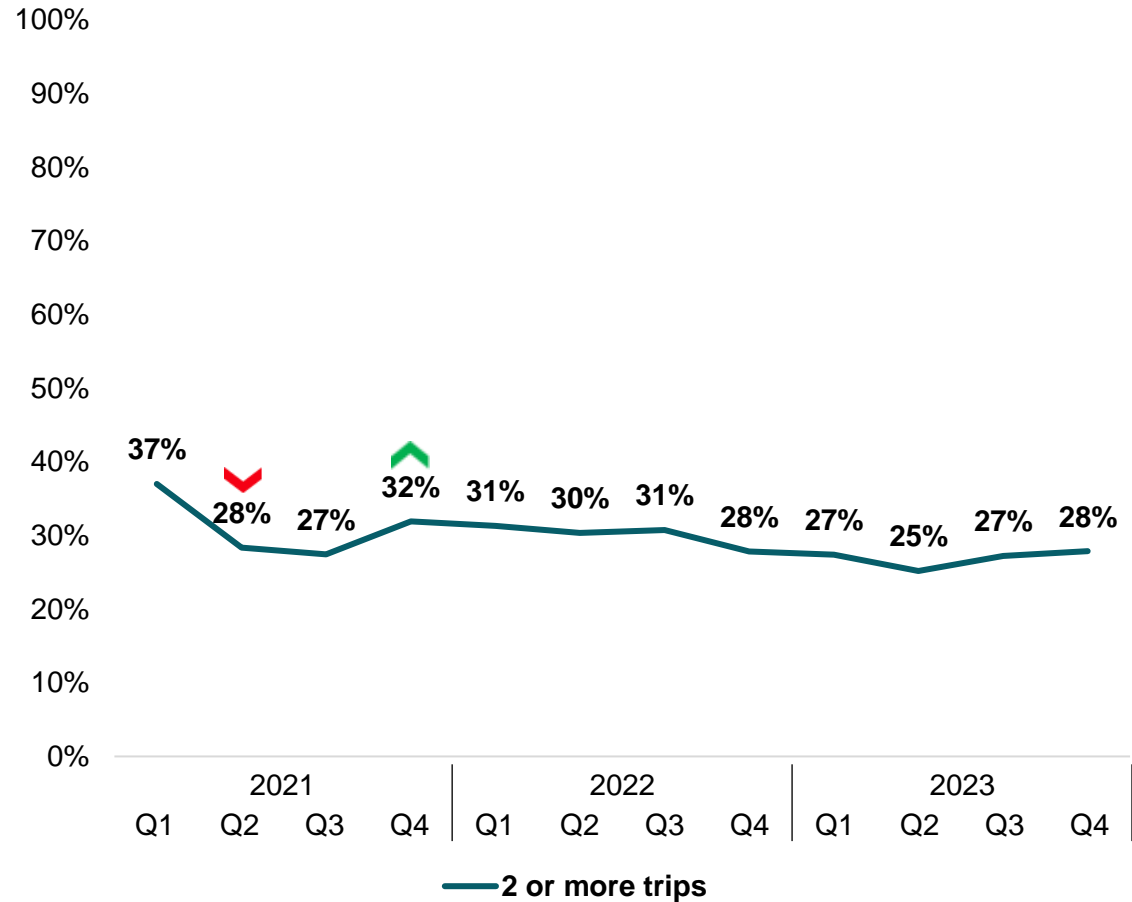


Japanese are planning fewer trips than in previous years, with less than three in ten planning two or more trips in the next year

## Number of Trips Planned



## Number of Trips Planned (Trended)

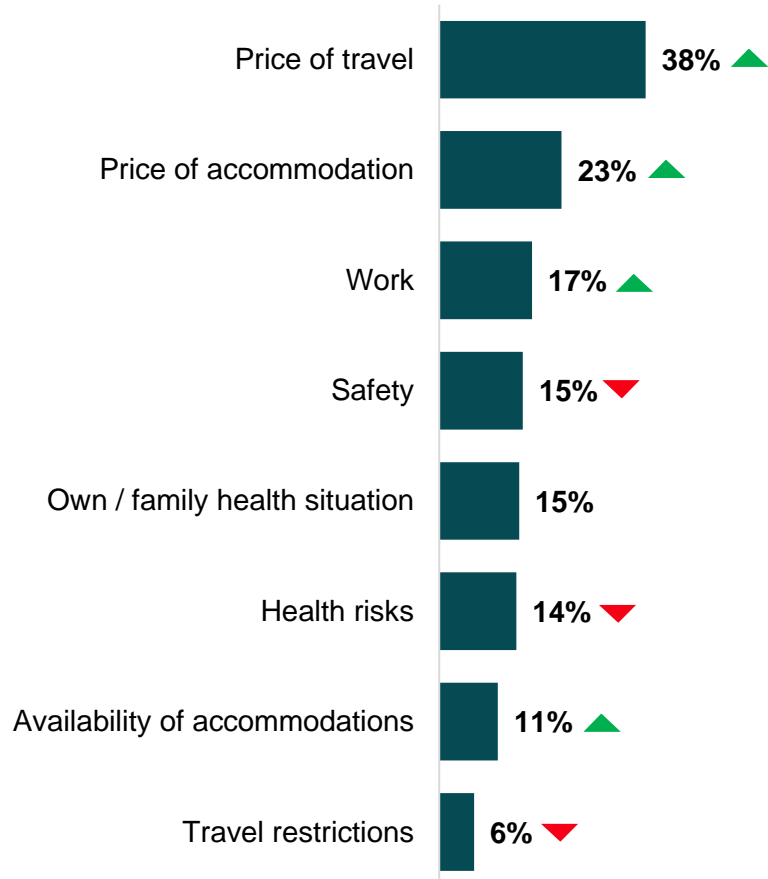


# Factors Preventing Travel

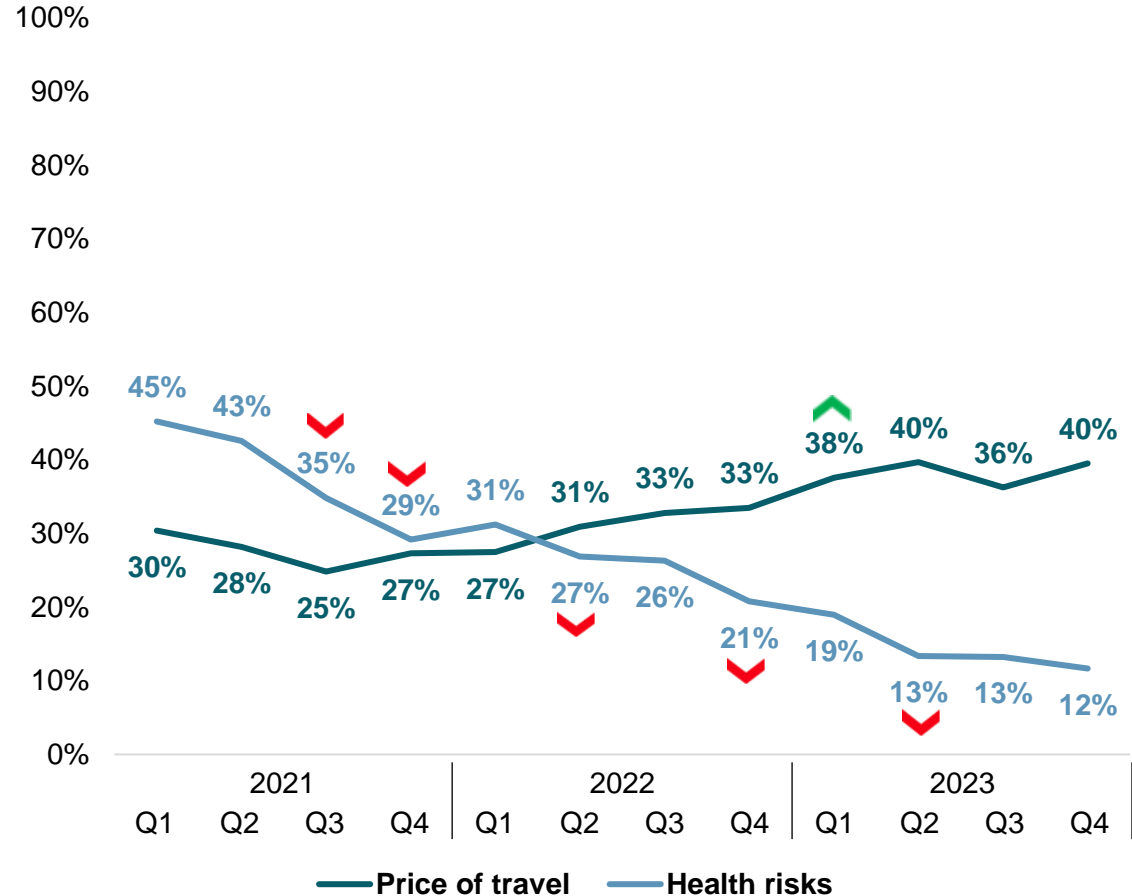


The effects of the pandemic lingered among Japanese, with 2023 marking the first year when health risks and safety did not rank within the top three travel obstacles. Rising mentions of price of travel as an obstacle could be attributed to a weak Japanese Yen

## Factors Preventing Travel



## Select Factors Preventing Travel (Trended)



2023 Base: Japanese 18+ (n=5,558)  
 2021-2023 Quarterly Trending Base Range: Japanese 18+ (n=1,020-1,425)  
 Q: Which, if any, of the below factors are currently preventing you from travelling? Please select all that apply.

▲ / ▼ = significantly higher/lower result (vs. 2022) | ▲ / ▼ = significantly higher/lower result (vs. previous quarter)

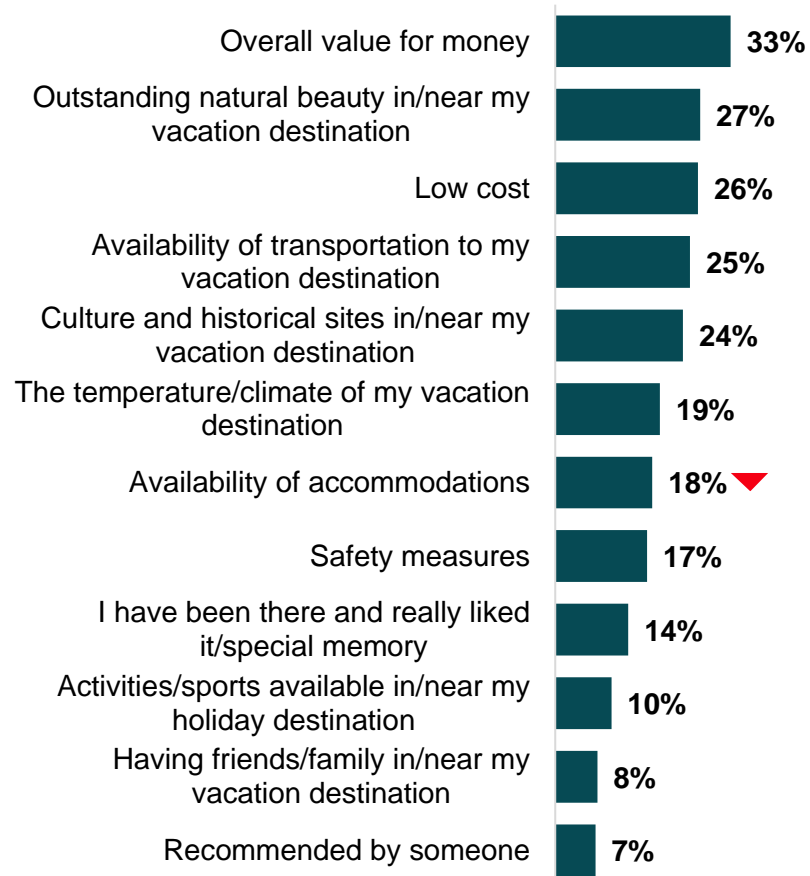


# Destination Choice Influences

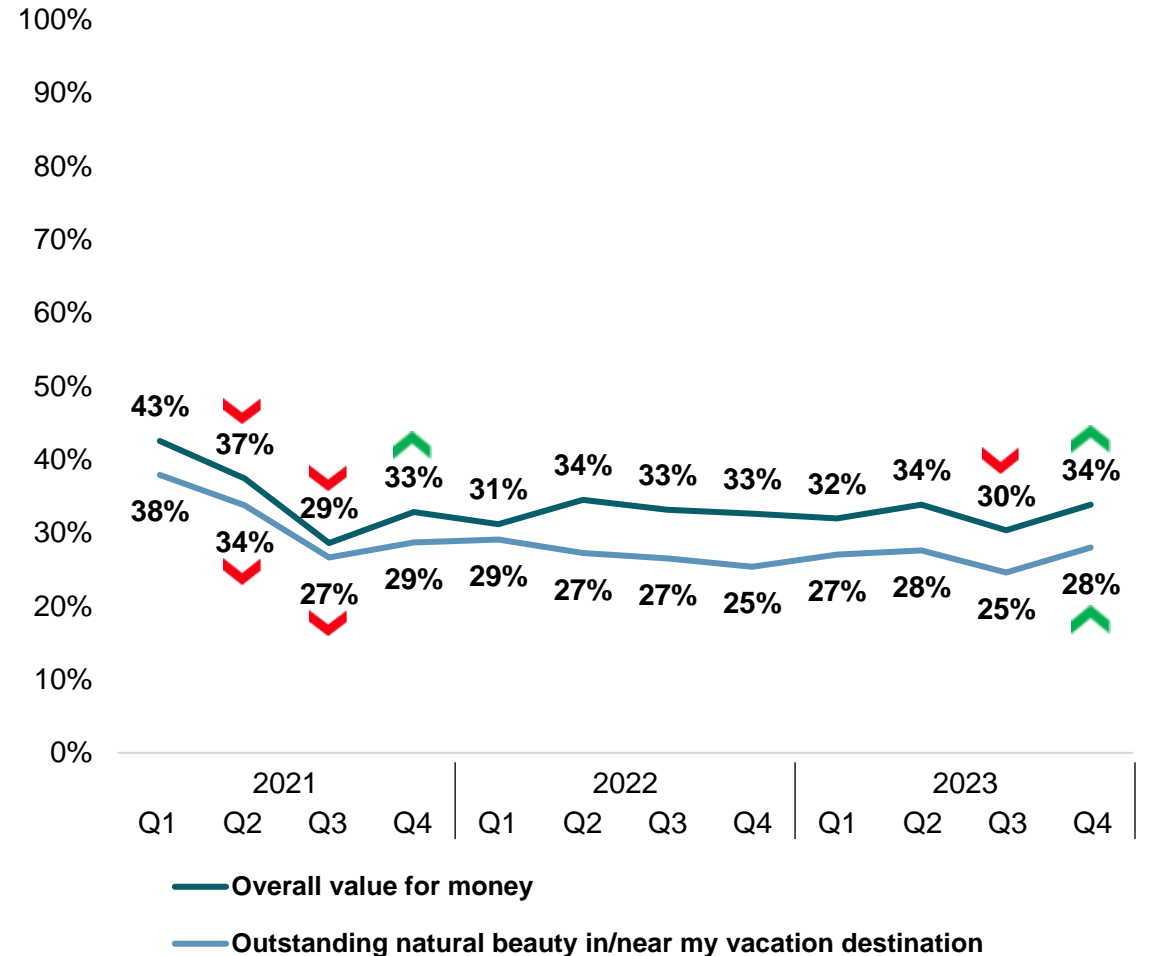


*What draws Japanese to a destination remains relatively consistent with 2022 results, with overall value for money ranking as the most mentioned influence. This is followed by outstanding natural beauty, low cost, availability of transportation and cultural/historical sites. Fewer than one in ten Japanese mention being influenced by recommendations when choosing a destination*

## Destination Choice Influences (Top Responses)



## Select Destination Choice Influences (Trended)



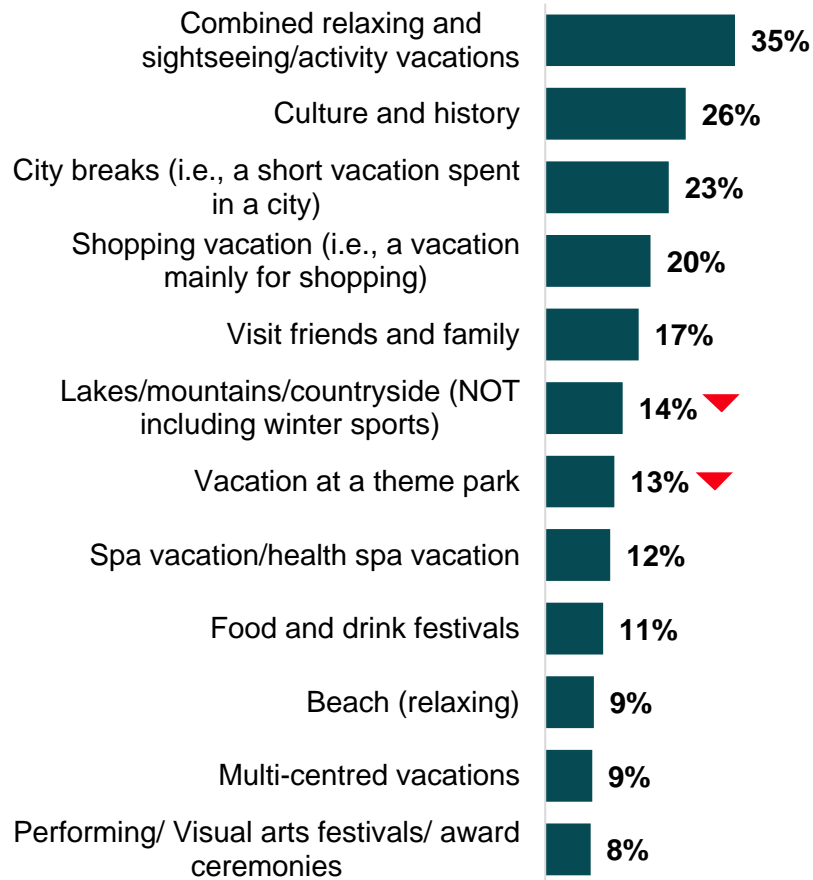


# Favourite Types of Vacations

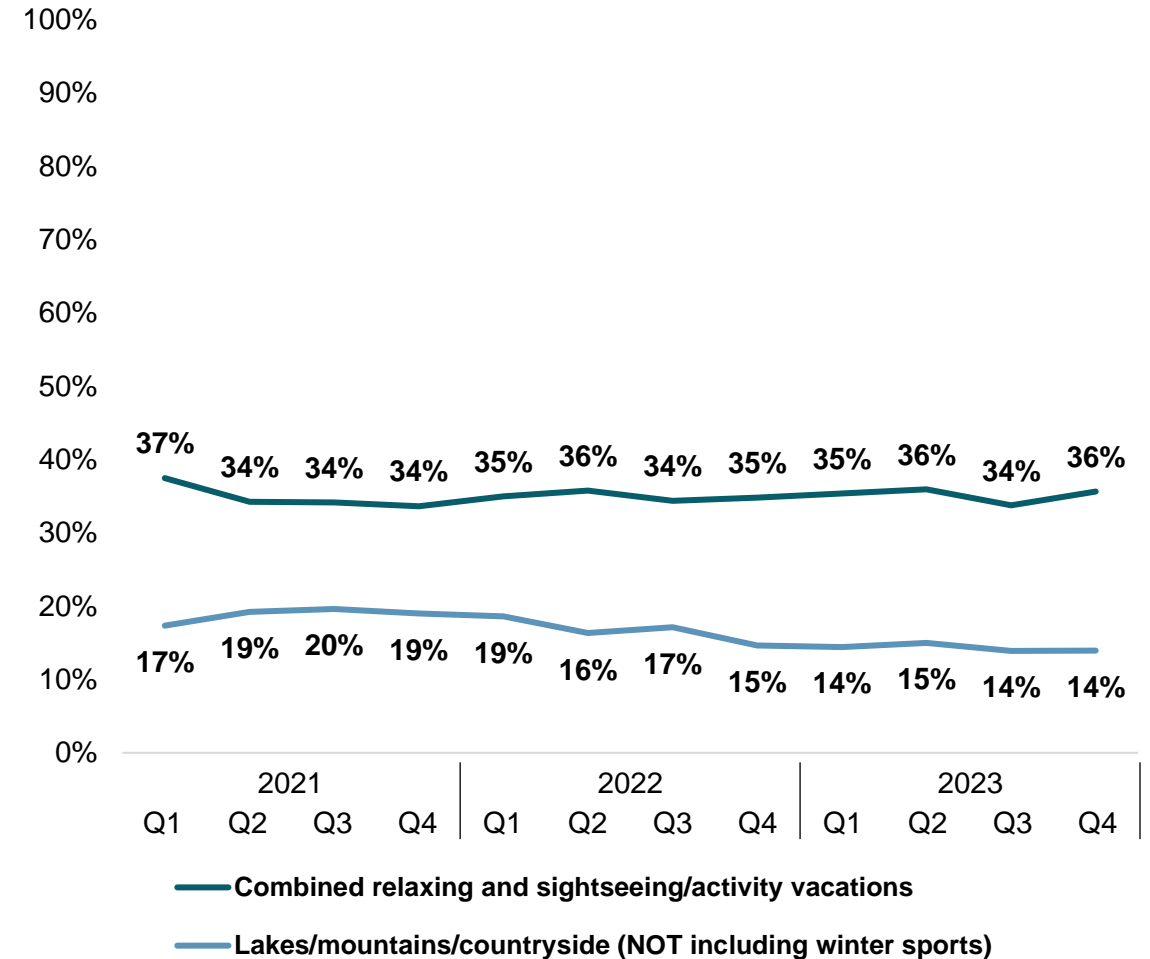


While nature can attract Japanese visitors to a destination, Japanese favour vacations that can combine both relaxing and sightseeing/activity. Preference of nature focused vacations is down for the second consecutive year

## Favourite Types of Vacations (Top Responses)



## Select Favourite Types of Vacations (Trended)



2023 Base: Japanese 18+ (n=5,558)  
 2021-2023 Quarterly Trending Base Range: Japanese 18+ (n=4,586-4,962)  
 Q: Thinking more generally about the vacations that you go on, not just those that you have taken in the last 12 months, which, if any, of the following types of vacations do you typically take? Please select all that apply.

# Vacation Planning Methods

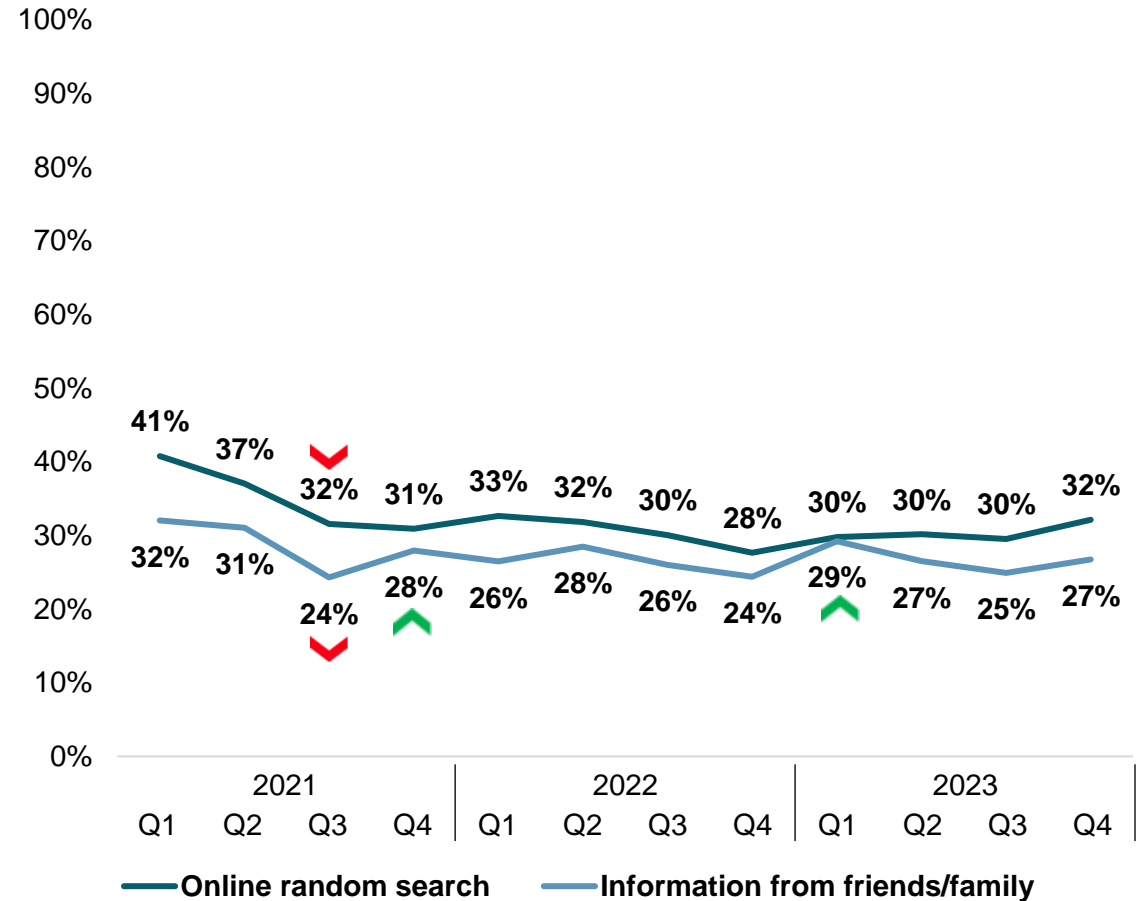


The resources Japanese use to plan vacations remained mostly the same, with online random search, information from friends/family and information from specialized travel shopping websites being the most mentioned resources. Japanese travellers seldom rely on recommendations for destination choices but factor in input from friends or family during vacation planning

## Vacation Planning Methods



## Select Vacation Planning Methods (Trended)

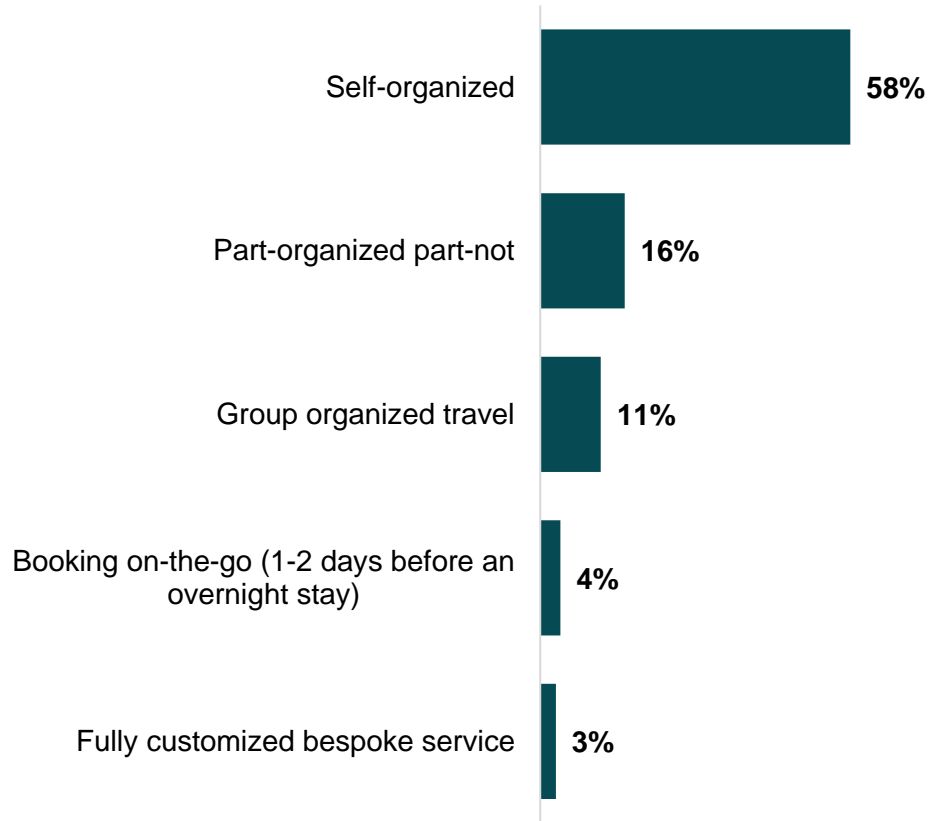


# Vacation Organization Habits

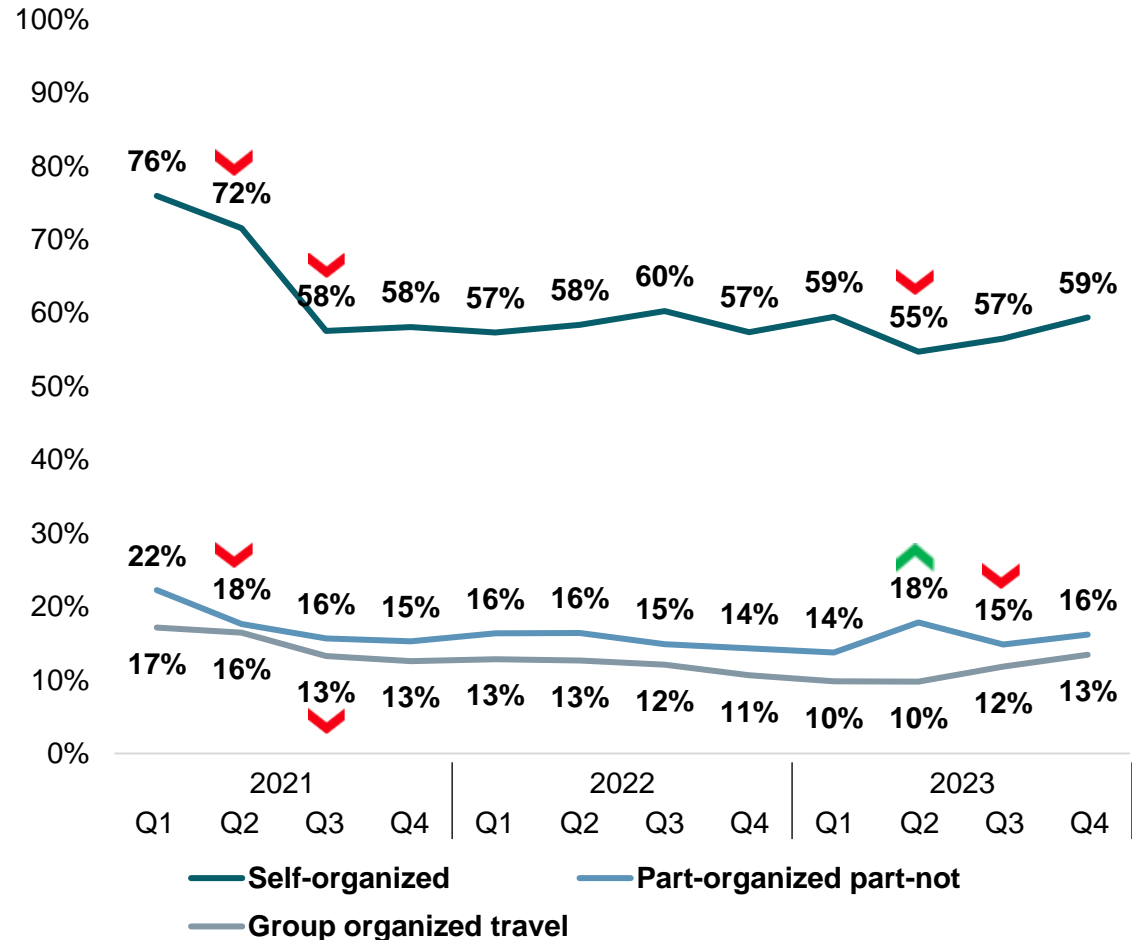


While self-organized travel has decreased significantly compared to its prevalence in early 2021, it is still the predominant organization method used by the majority of Japanese

## Vacation Organization Habits



## Select Vacation Organization Habits (Trended)

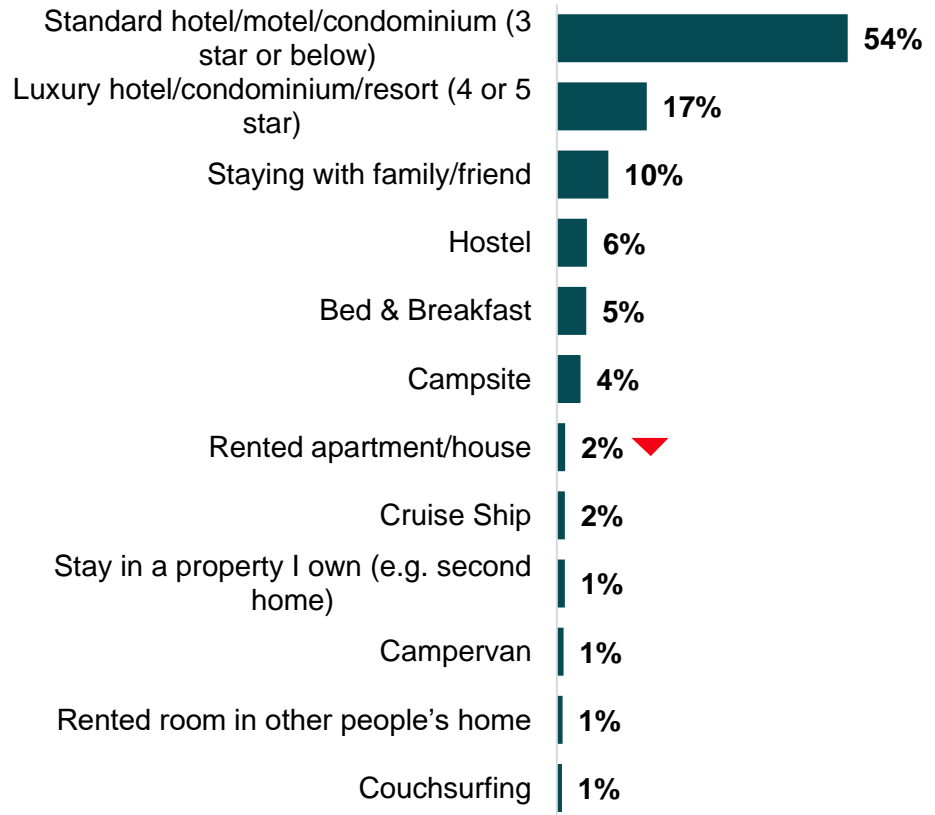


# Accommodation Type Typically Stayed At

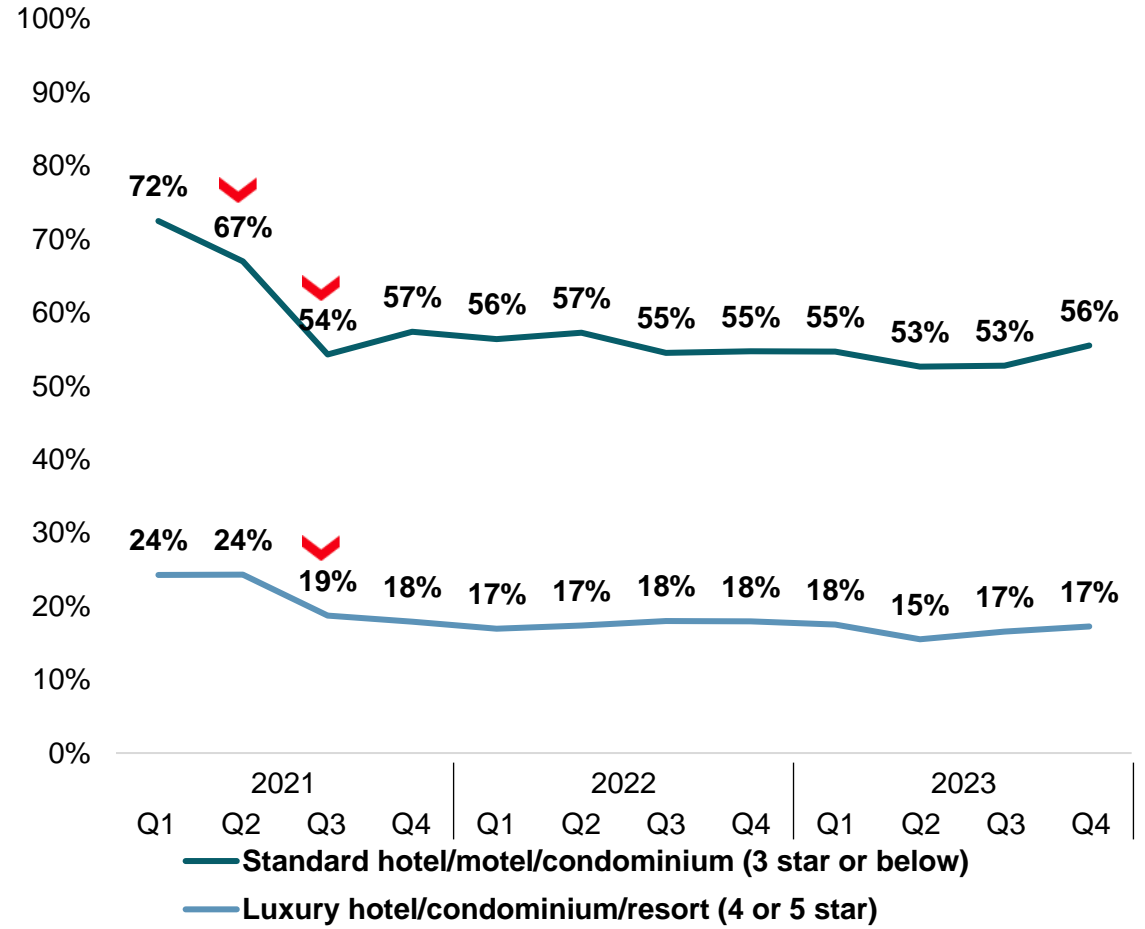


When travelling, standard hotels are the most used type of accommodation, as Japanese are three times as likely to stay at one than the next closest type of accommodation

## Accommodation Type Typically Stayed At



## Select Accommodation Types (Trended)



2023 Base: Japanese 18+ (n=5,558)  
 2021-2023 Quarterly Trending Base Range: Japanese 18+ (n=1,020-1,425)  
 Q: Which, if any, of the following types of accommodation do you typically stay in when you are on vacation? Please select all that apply

▲ / ▼ = significantly higher/lower result (vs. 2022) | ▲ / ▼ = significantly higher/lower result (vs. previous quarter)





# Accommodation Booking Methods

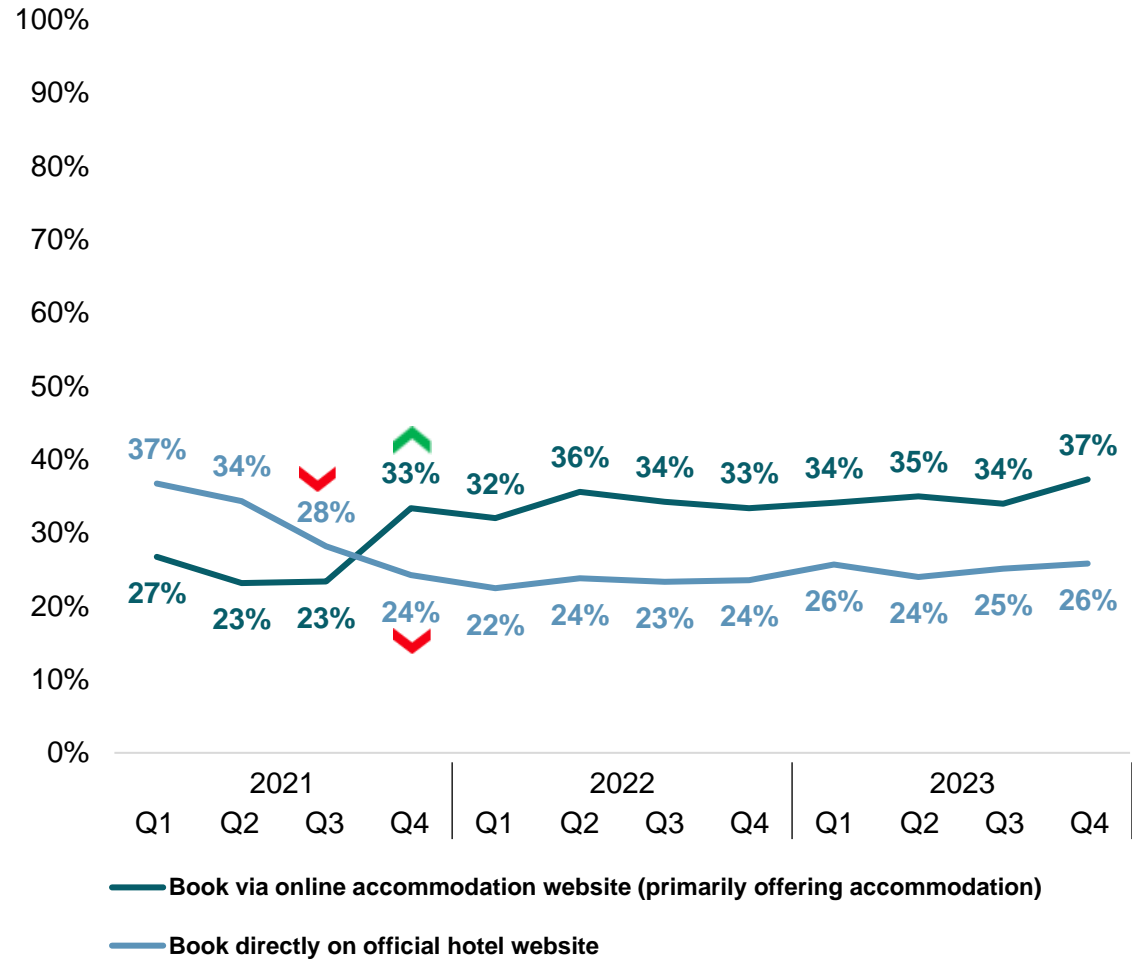


While searching for the best value deal, Japanese seem to be turning to third-party aggregators to find the right hotels that fit their budgets. 2021 saw a change in booking behaviour as direct bookings were overtaken by bookings via aggregators

## Accommodation Booking Methods



## Select Accommodation Booking Methods (Trended)

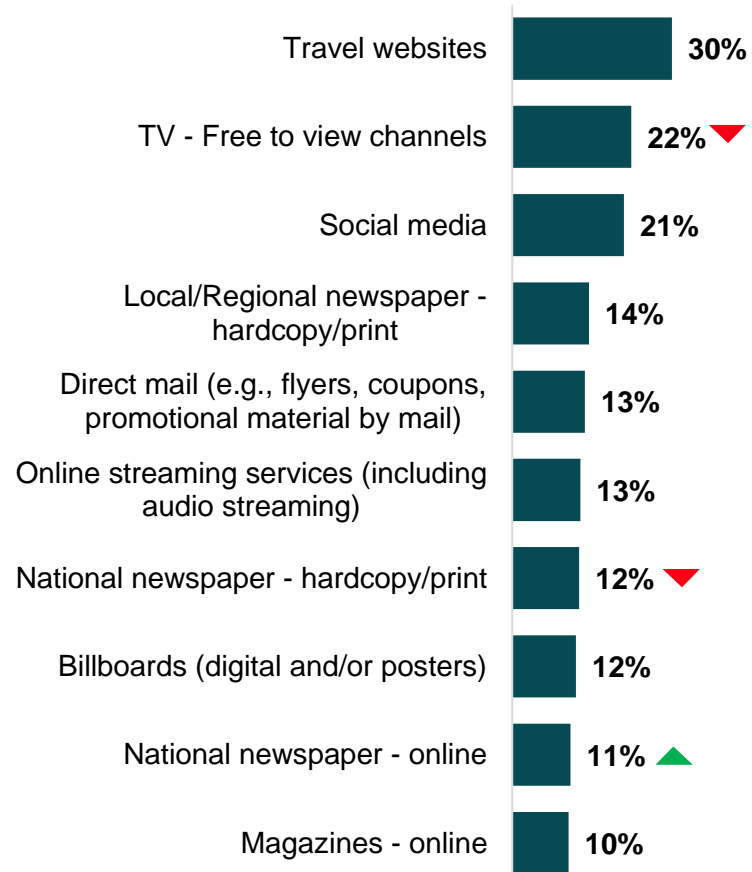


# Effective Types of Travel Advertising

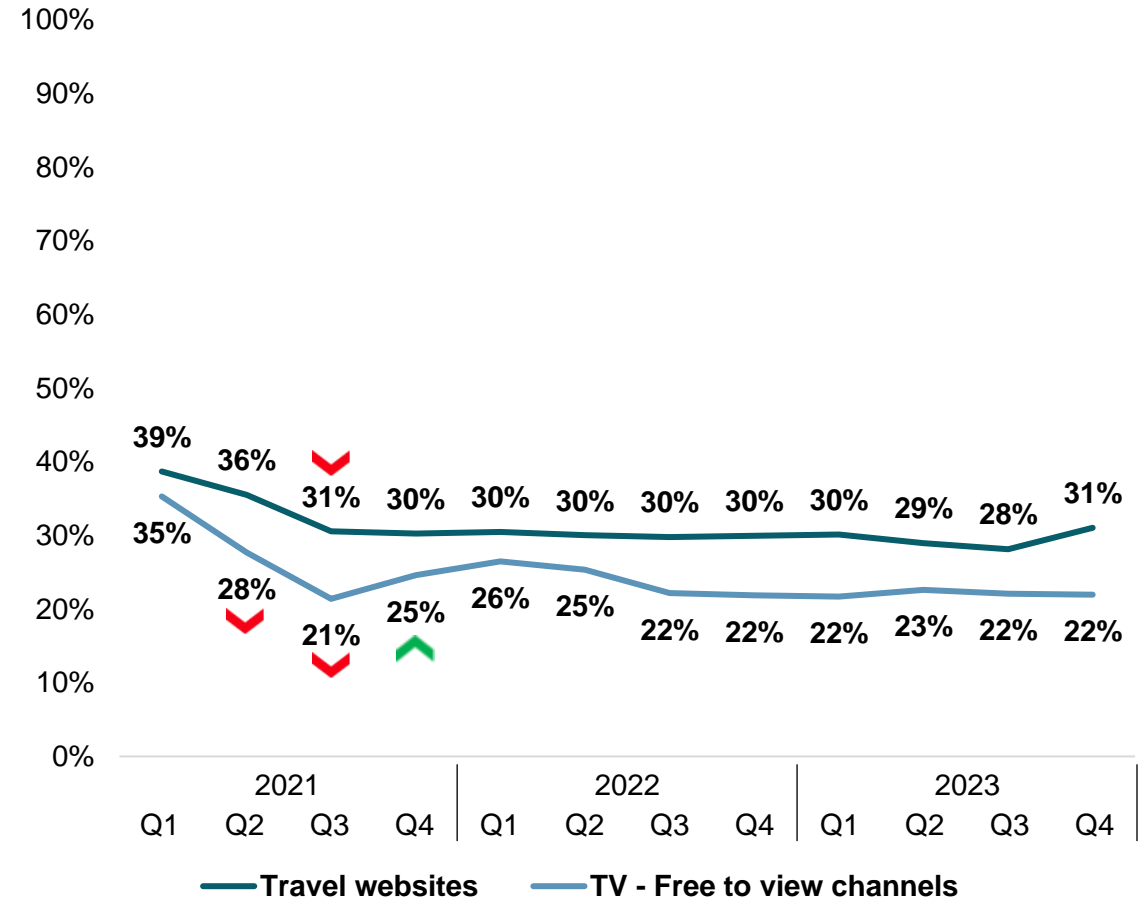


Travel websites are the top mentioned advertising channel for catching the attention of Japanese, followed by TV and social media; mentions of TV are down year-over-year

## Effective Types of Travel Advertising (Top Responses)



## Select Types of Travel Advertising (Trended)



2023 Base: Japanese 18+ (n=5,558)  
 2021-2023 Quarterly Trending Base Range: Japanese 18+ (n=1,568-4,962)  
 Q: Thinking about your next travel- or vacation-related purchase, if you were a travel/vacation provider where would you advertise to catch your attention? Please select all that apply.



# Performance of Canada in 2023 vs. Competitors



Yellowknife  
Northwest Territories



# Performance Scorecard for Canada

Metric		Definition		Question Text
Total Impression	→	The degree to which consumers feel they know and understand a brand, beyond just being aware of its existence. Total impression = positive + negative impression	→	Overall, of which of the following destinations do you have a POSITIVE impression? / Now which of the following destinations do you have an overall NEGATIVE impression?
Consideration	→	The number of consumers who would consider the destination when they are next in market to plan a vacation.	→	When you are in the market next to plan a vacation or a fun day out for yourself / your family, which destinations would you consider?
Positive Recommend	→	How likely consumers are to recommend a destination to a friend or colleague.	→	Which of the following destinations would you RECOMMEND to a friend or colleague?
Destination Health Index	→	Overall measure of a destination's brand health across several key destination health metrics.	→	Average of Positive Impression, Positive Reputation, Positive Quality, Positive Value, Positive Satisfaction, Positive Recommend
Positive Reputation	→	How much consumers like and respect a destination.	→	Which of the following destinations do you regard as having a GOOD reputation for vacations?
Positive Buzz	→	How much positive news coverage consumers are hearing about a destination.	→	Over the PAST TWO WEEKS, which of the following destinations have you heard something POSITIVE about (whether in the news, through advertising, or talking to friends and family)?
Ad Awareness	→	How much advertising consumers have seen for a destination.	→	Which of the following destinations have you seen an advertisement for in the PAST TWO WEEKS?
Word of Mouth	→	How much consumers are talking about a destination.	→	Which of the following destinations have you talked about with friends and family in the PAST TWO WEEKS (whether in-person, online, or through social media)?

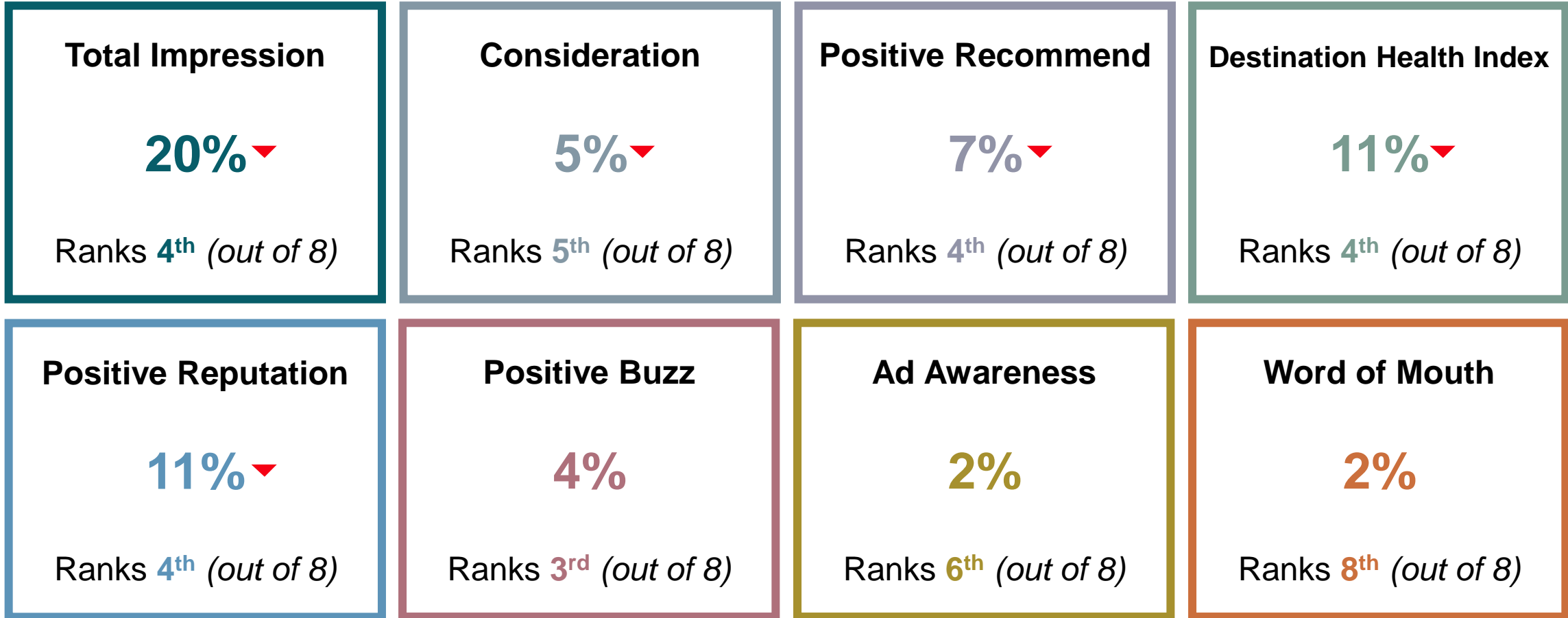




# Performance Scorecard for Canada



Canada struggled in Japan in 2023, ranking within the top three (out of 8 destinations) on only one metric and experiencing significant year-over-year decreases in five of eight metrics



# 2023 Annual Scores



While scores for Canada rank low, Canada's scores are within one-point of the competitive set average in all metrics, with many destinations clustered together in scores. Australia is the top performing long-haul destination in 2023, ranking first in all metrics. Despite an increase in planned international vacations, scores are down for many long-haul destinations

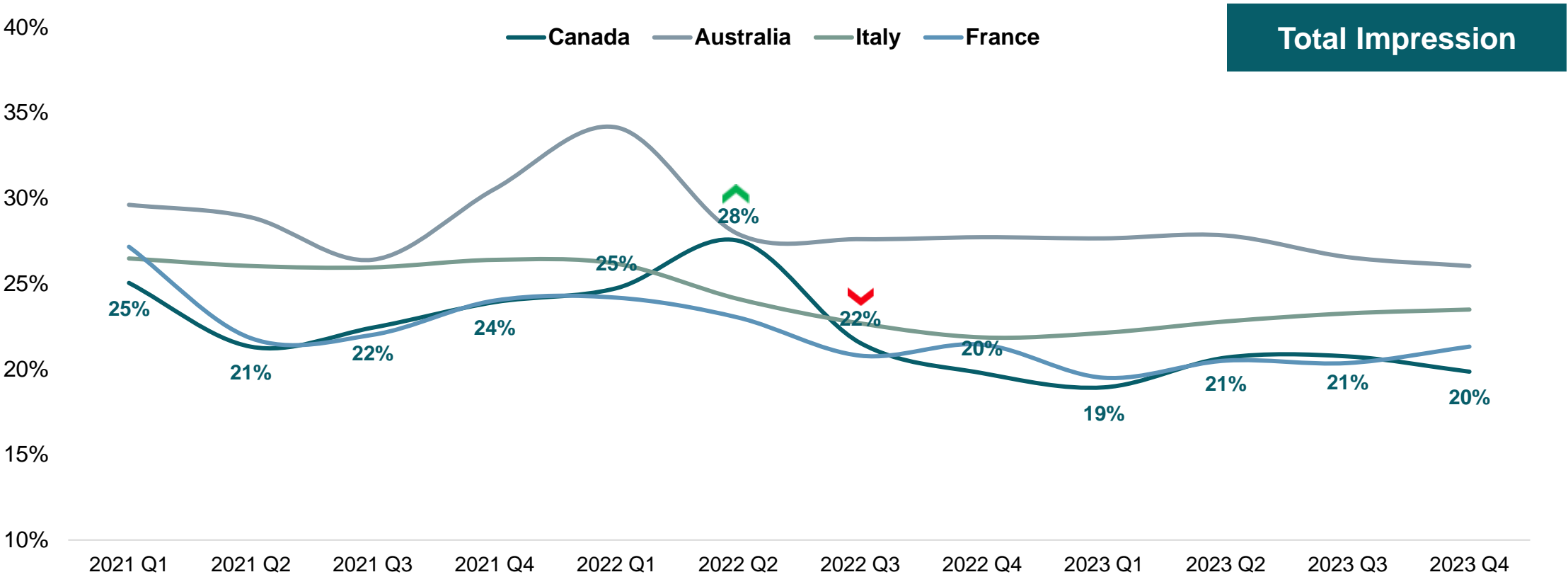
	Canada	Australia	Italy	France	Spain	Germany	UK	US
Total Impression	20% ▼	27% ▼	23%	20% ▼	16% ▼	18%	16% ▼	15% ▼
Consideration	5% ▼	8%	7%	6% ▼	5%	5%	4% ▼	4%
Positive Recommend	7% ▼	11%	10% ▼	8%	7%	6%	6%	5% ▼
Destination Health Index	11% ▼	16% ▼	15% ▼	13% ▼	10% ▼	10% ▼	9% ▼	8% ▼
Positive Reputation	11% ▼	18% ▼	14% ▼	13%	10% ▼	8%	7% ▼	7% ▼
Positive Buzz	4%	7%	5%	4% ▼	4%	4%	4% ▼	4% ▼
Ad Awareness	2%	5%	3%	2%	2%	2%	2% ▼	3%
Word of Mouth	2%	4%	3%	3%	2%	2%	2% ▼	3%



# Total Impression: Positive + Negative Impression (Trended)



Familiarity scores within Japan were relatively stable over the course of 2023, a contrast to the score volatility seen in 2022



	2021 Q1	2021 Q2	2021 Q3	2021 Q4	2022 Q1	2022 Q2	2022 Q3	2022 Q4	2023 Q1	2023 Q2	2023 Q3	2023 Q4
<b>Canada's Rank</b>	#4	#4	#3	#4	#3	#2	#3	#4	#4	#3	#3	#4
<b>Top Ranked Destination</b>	Australia	Australia	Australia	Australia	Australia	Australia	Australia	Australia	Australia	Australia	Australia	Australia

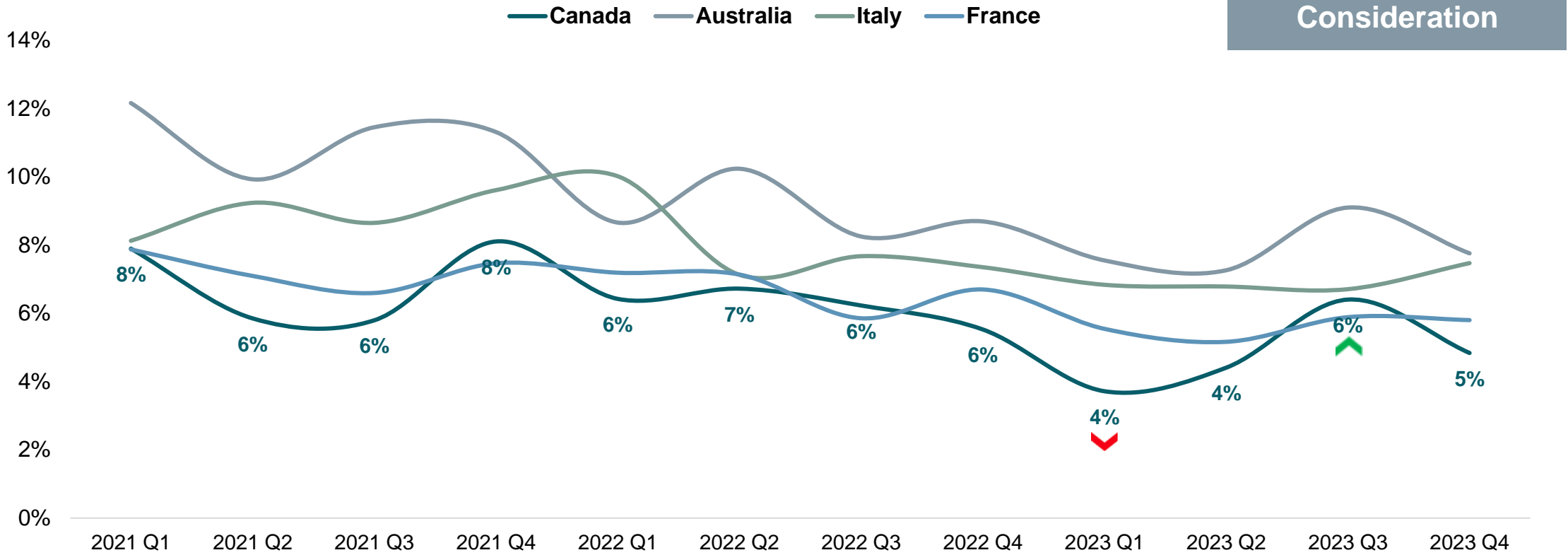
23 2021-2023 Quarterly Trending Base Range: Japanese 18+ (n=815-1,466)  
 Q: Overall, of which of the following destinations do you have a POSITIVE impression? / Now which of the following destinations do you have an overall NEGATIVE impression?



# Consideration (Trended)



Consideration of Canada spiked in 2023 Q3, with 6% of Japanese considering travelling to Canada, ranking 3<sup>rd</sup> within the competitive set during the quarter. Australia consistently ranks first in consideration, followed closely by Italy



	2021 Q1	2021 Q2	2021 Q3	2021 Q4	2022 Q1	2022 Q2	2022 Q3	2022 Q4	2023 Q1	2023 Q2	2023 Q3	2023 Q4
<b>Canada's Rank</b>	#3	#7	#6	#3	#4	#4	#4	#5	#8	#6	#3	#6
<b>Top Ranked Destination</b>	Australia	Australia	Australia	Australia	Italy	Australia	Australia	Australia	Australia	Australia	Australia	Australia

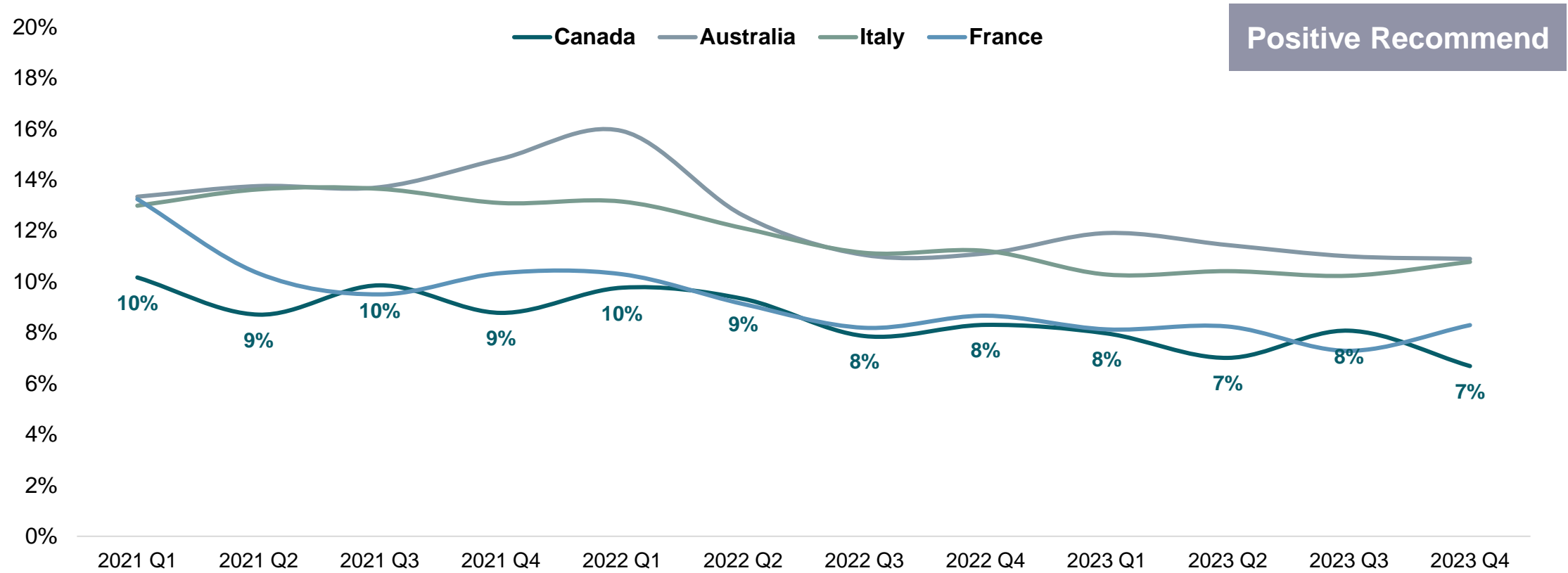
24 2021-2023 Quarterly Trending Base Range: Japanese 18+ (n=815-1,466)  
Q: When you are in the market next to plan a vacation or a fun day out for yourself / your family, which destinations would you consider?



# Positive Recommend (Trended)



Fewer Japanese are recommending Canada as a travel destination than in years past, as Canada, along with Italy and the US, experienced year-over-year decreases in recommendations



Positive Recommend

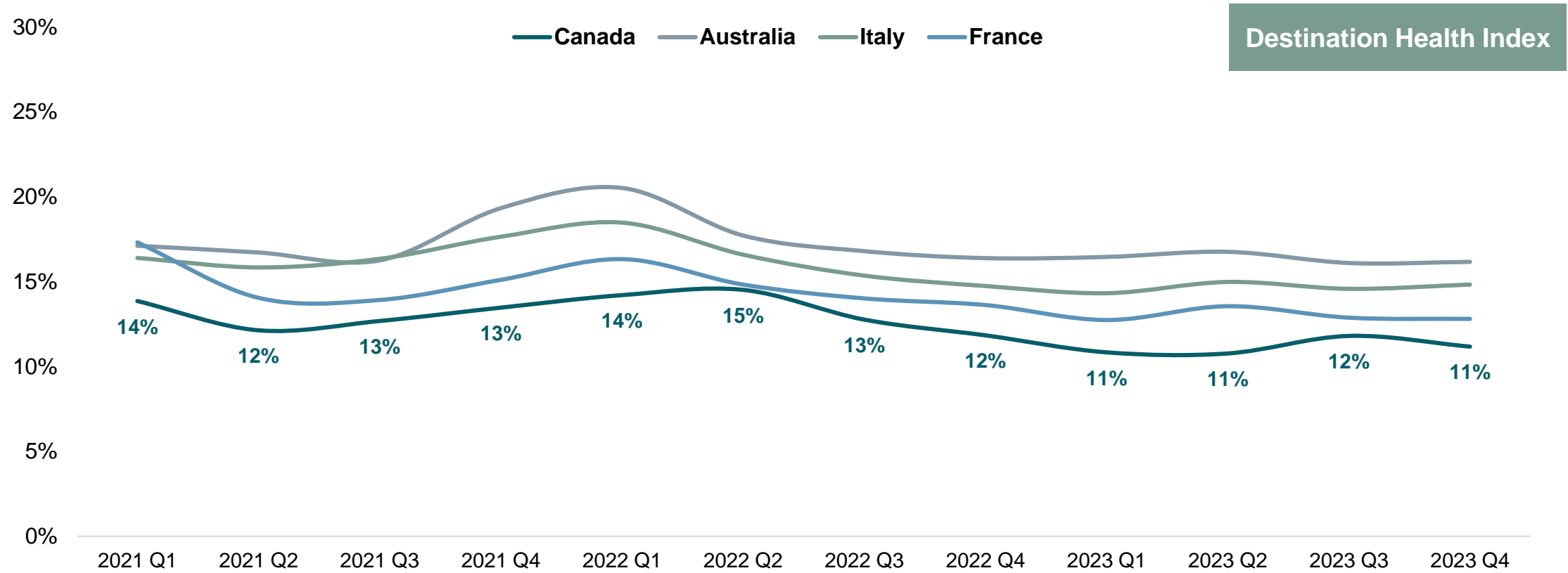
	2021 Q1	2021 Q2	2021 Q3	2021 Q4	2022 Q1	2022 Q2	2022 Q3	2022 Q4	2023 Q1	2023 Q2	2023 Q3	2023 Q4
<b>Canada's Rank</b>	#4	#6	#3	#6	#5	#3	#4	#4	#4	#4	#3	#5
<b>Top Ranked Destination</b>	Australia	Australia	Australia	Australia	Australia	Australia	Italy	Italy	Australia	Australia	Australia	Australia



# Destination Health Index (Trended)



Overall destination health of Canada as well as all competitors are down year-over-year, with rankings also staying consistent



	2021 Q1	2021 Q2	2021 Q3	2021 Q4	2022 Q1	2022 Q2	2022 Q3	2022 Q4	2023 Q1	2023 Q2	2023 Q3	2023 Q4
<b>Canada's Rank</b>	#4	#6	#4	#4	#4	#4	#4	#4	#4	#4	#4	#4
<b>Top Ranked Destination</b>	France	Australia	Italy	Australia	Australia	Australia	Australia	Australia	Australia	Australia	Australia	Australia

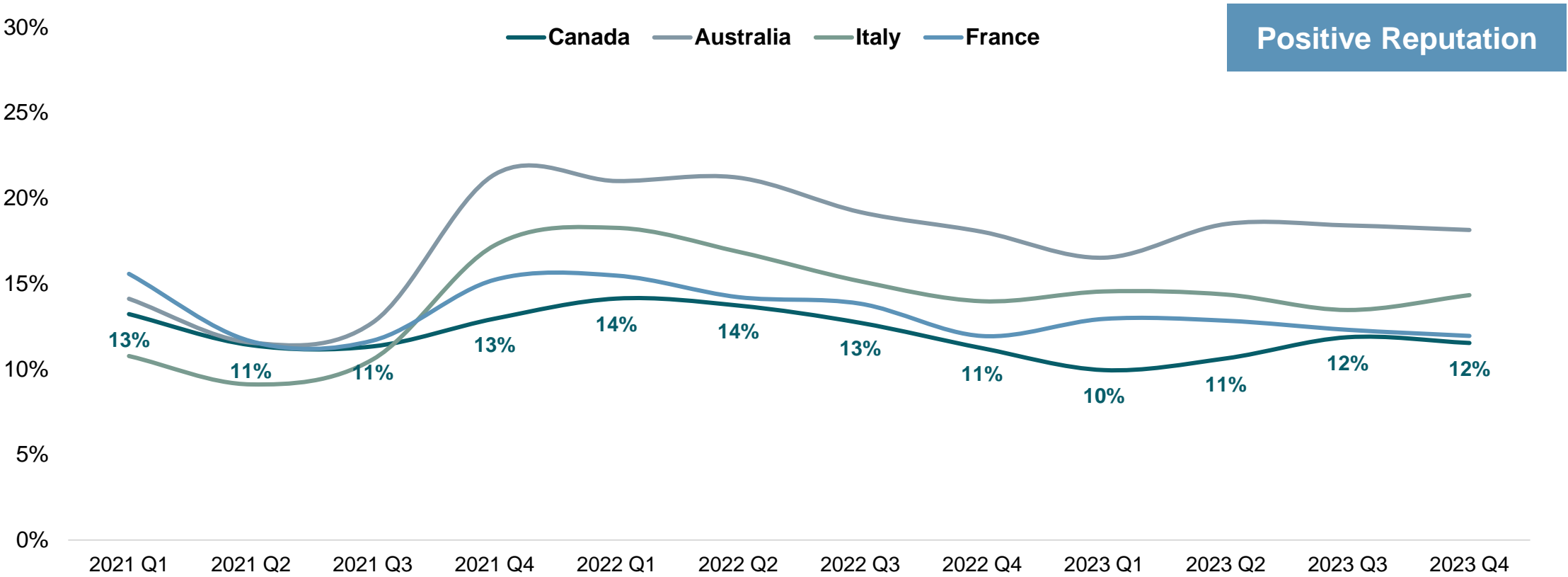




# Positive Reputation (Trended)



Reputation of many competitors spiked in late 2021 and into early 2022. Scores have been trending downwards since, though Canada's score has recovered slightly after reaching a low in 2023 Q1; Canada now trails France only marginally



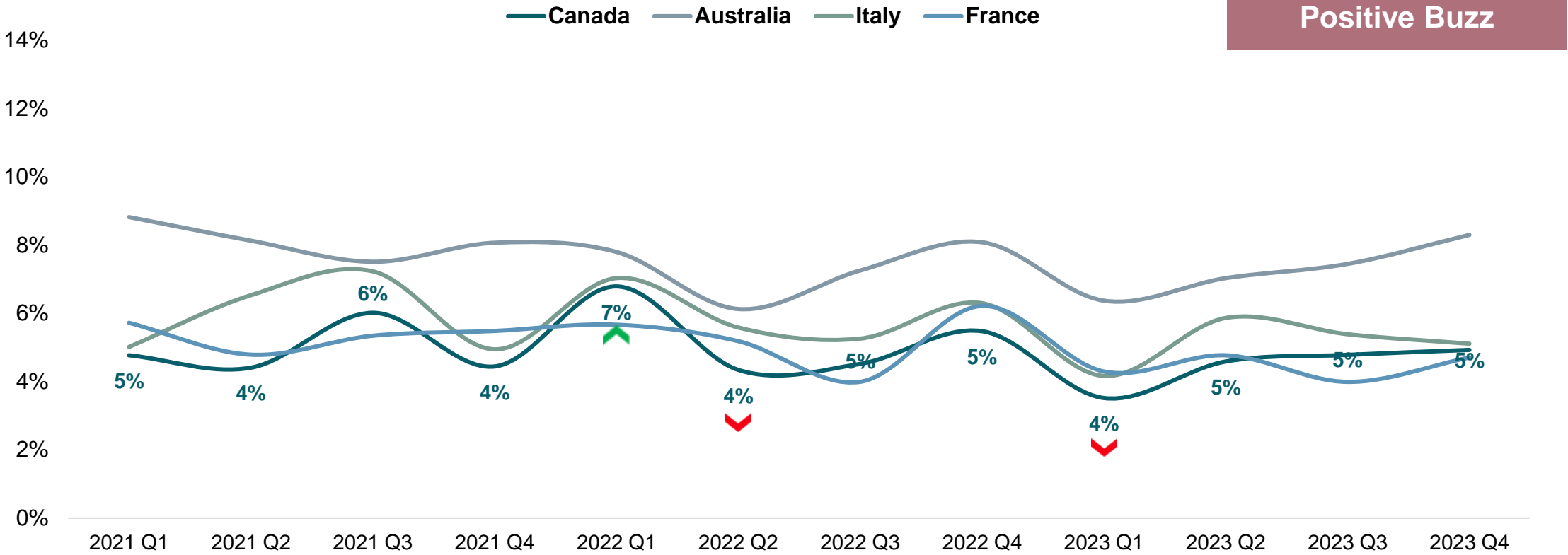
Positive Reputation

	2021 Q1	2021 Q2	2021 Q3	2021 Q4	2022 Q1	2022 Q2	2022 Q3	2022 Q4	2023 Q1	2023 Q2	2023 Q3	2023 Q4
<b>Canada's Rank</b>	#5	#6	#6	#4	#4	#4	#4	#4	#5	#4	#4	#4
<b>Top Ranked Destination</b>	US	US	Australia	Australia	Australia	Australia	Australia	Australia	Australia	Australia	Australia	Australia



# Positive Buzz (Trended)

Positive buzz towards Canada as well as most competitors remains low



Positive Buzz

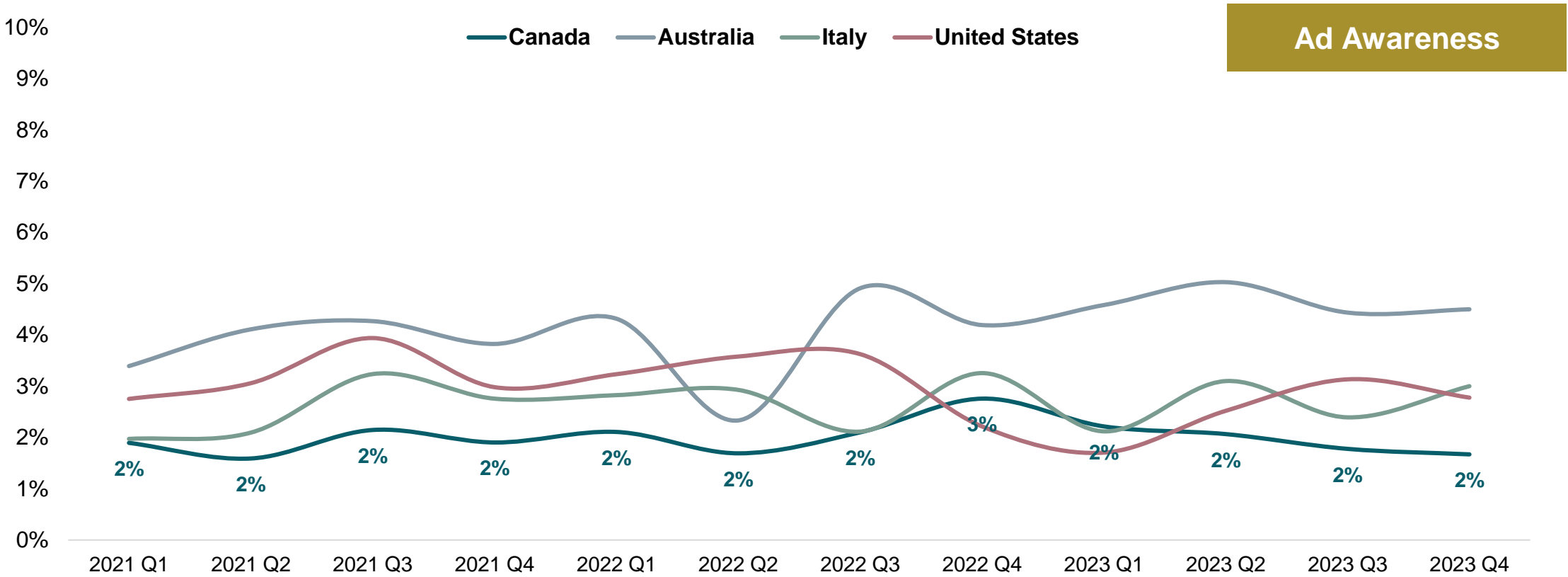
	2021 Q1	2021 Q2	2021 Q3	2021 Q4	2022 Q1	2022 Q2	2022 Q3	2022 Q4	2023 Q1	2023 Q2	2023 Q3	2023 Q4
<b>Canada's Rank</b>	#5	#6	#3	#6	#3	#6	#5	#4	#5	#4	#3	#3
<b>Top Ranked Destination</b>	Australia	Australia	Australia	Australia	Australia	Australia	Australia	Australia	Australia	Australia	Australia	Australia

28 2021-2023 Quarterly Trending Base Range: Japanese 18+ (n=815-1,466)  
 Q: Over the PAST TWO WEEKS, which of the following destinations have you heard something POSITIVE about (whether in the news, through advertising, or talking to friends and family)?



# Ad Awareness (Trended)

Ad awareness among Japanese is low for long-haul destinations. Australia ranks first within the competitive set, however, only one in twenty recall seeing an ad for Australia



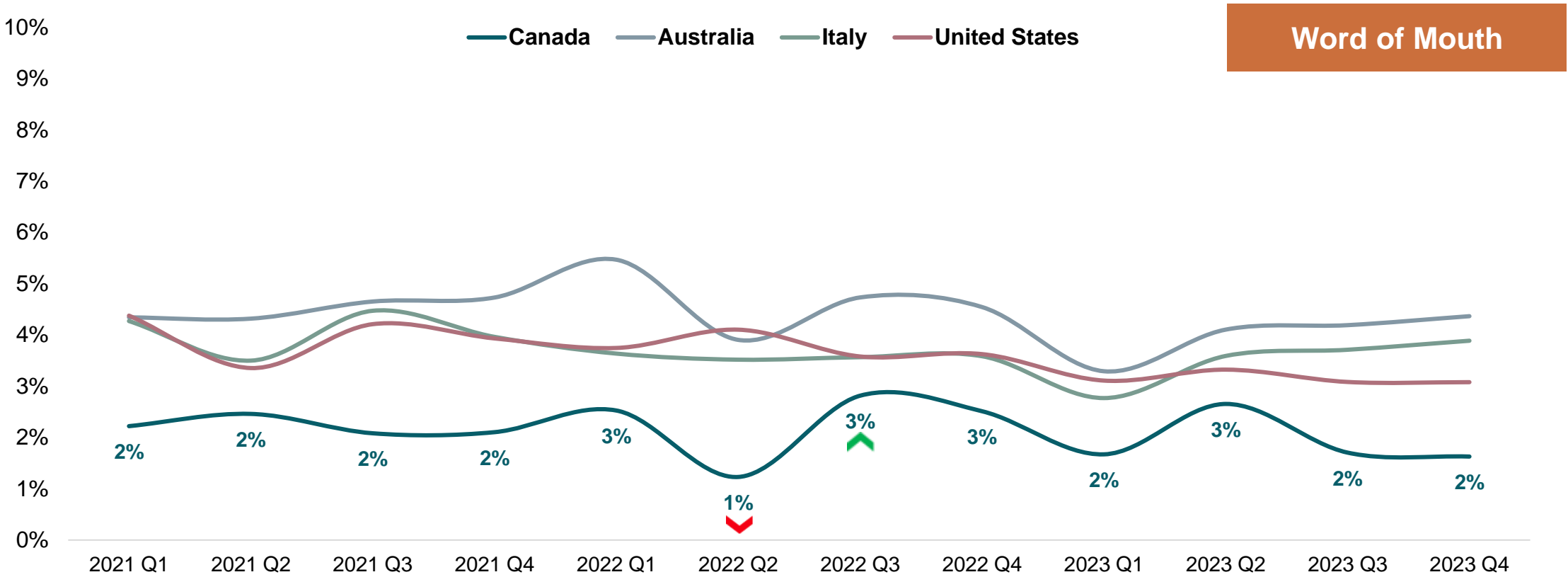
Ad Awareness

	2021 Q1	2021 Q2	2021 Q3	2021 Q4	2022 Q1	2022 Q2	2022 Q3	2022 Q4	2023 Q1	2023 Q2	2023 Q3	2023 Q4
<b>Canada's Rank</b>	#6	#6	#6	#6	#5	#7	#5	#4	#3	#5	#7	#6
<b>Top Ranked Destination</b>	France	Australia	Australia	Australia	Australia	US	Australia	Australia	Australia	Australia	Australia	Australia



# Word of Mouth (Trended)

Potentially a byproduct of low ad recall, long-haul destinations are not often spoken about among Japanese with fewer than one in twenty talking about Australia, the top ranked destination on all metrics



Word of Mouth

<b>Canada's Rank</b>	#8	#8	#8	#7	#7	#8	#5	#7	#8	#5	#8	#8
<b>Top Ranked Destination</b>	UK	Australia	Australia	Australia	Australia	US	Australia	Australia	Australia	Australia	Australia	Australia

30 2021-2023 Quarterly Trending Base Range: Japanese 18+ (n=815-1,466)  
 Q: Which of the following destinations have you talked about with friends and family in the PAST TWO WEEKS (whether in-person, online, or through social media)?



# THANK YOU

For any questions, please reach out to [research@destinationcanada.com](mailto:research@destinationcanada.com)



CANADIAN TOURISM DATA  
**collective**