

CONFIDENTIAL

2023 GLOBAL TRAVELLER RESEARCH PROGRAM

TOPLINE REPORT

TOTAL JAPAN VS. HIGH VALUE GUEST AUDIENCE



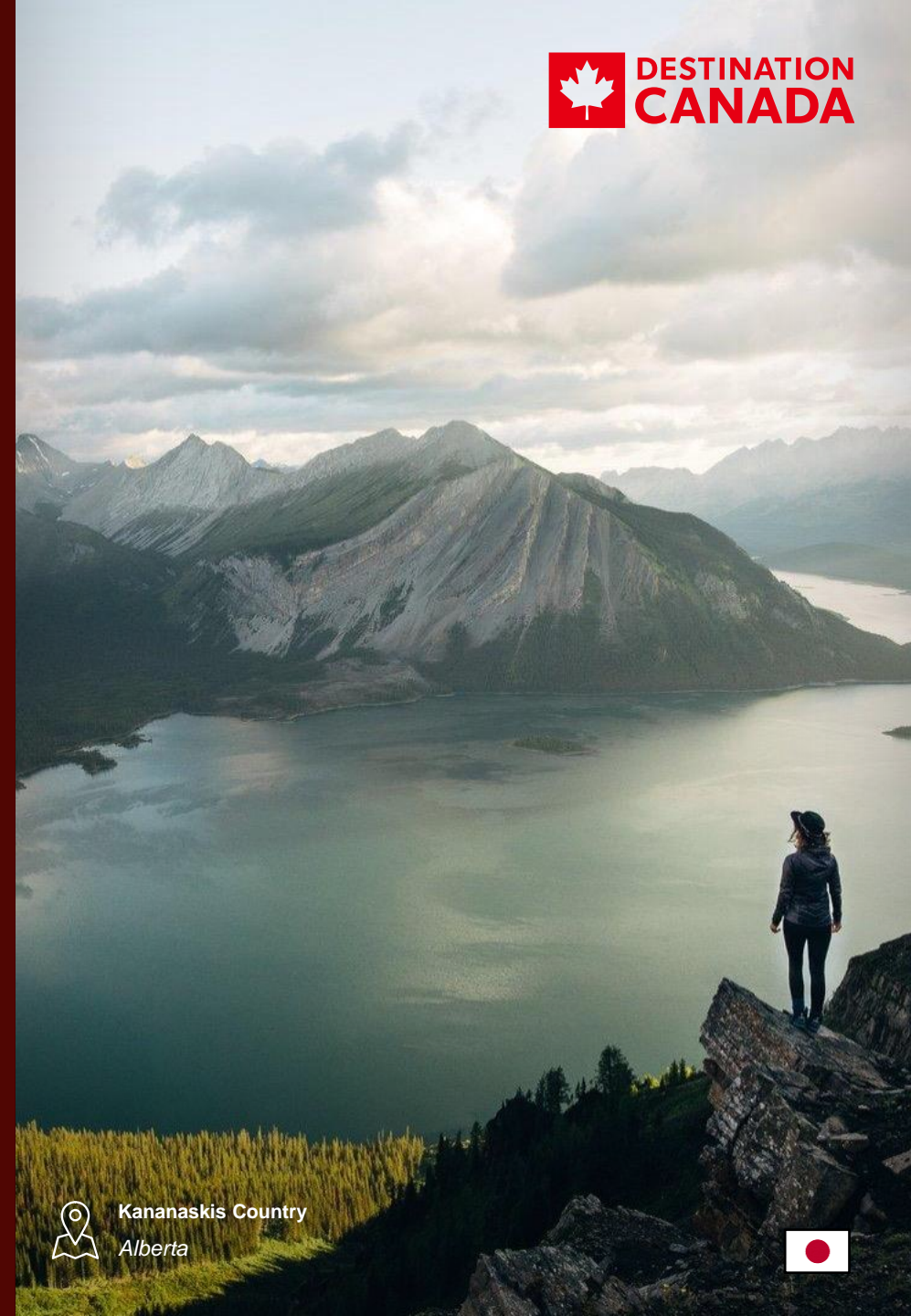
DESTINATION
CANADA



CANADIAN TOURISM DATA
collective

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Study Overview: Japan Market




The target population are residents aged 18 years and older who have taken a long-haul pleasure trip, where they had stayed at least 4 nights with a minimum of 1 night in paid accommodations in the past 3 years, or plan to take such a trip in the next 2 years.

HVG Audience Definition: Frequent travellers who are likely to travel long-haul in the next two years and either earn 8,000,000 yen+ household income per year or are retired.




Timing of Fieldwork

April 5th – 17th 2024



**Geographical Definition
for Qualified Trips**

**Outside of: East Asia
(e.g., China, Hong Kong,
Macau, Japan, South
Korea and Taiwan)**



Sample Distribution

Sample distribution:	National
High Value Guest (HVG) Audience:	189
Other travellers:	1312
Total sample size:	1501

- In 2023, DC switched research providers to YouGov Canada, with the project being migrated over to YouGov’s proprietary panel.
 - As a result, no trending is available for the Japan market.





Market Sizing



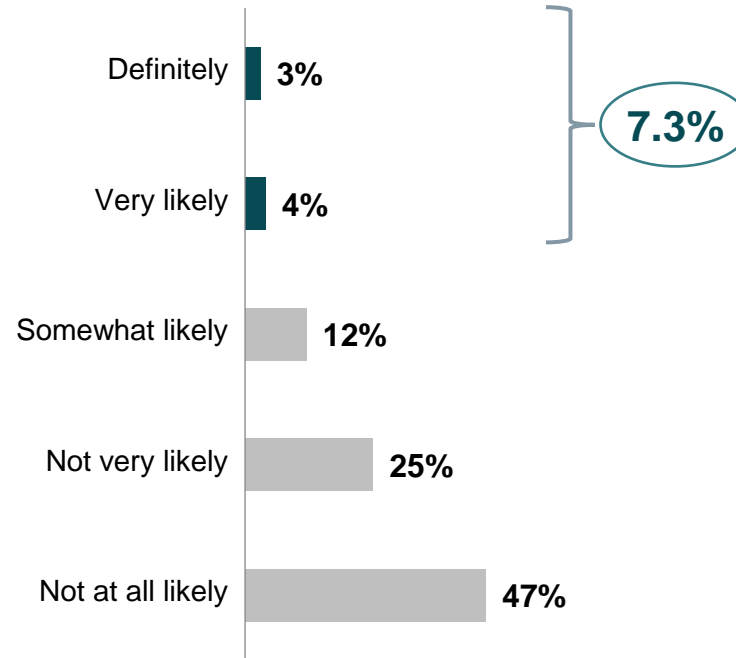
Yellowknife
Northwest Territories



Incidence of Long-Haul Pleasure Travel (General Population)



Plan to Take Long-Haul Pleasure Trip in Next 2 Years



Incidence Rate

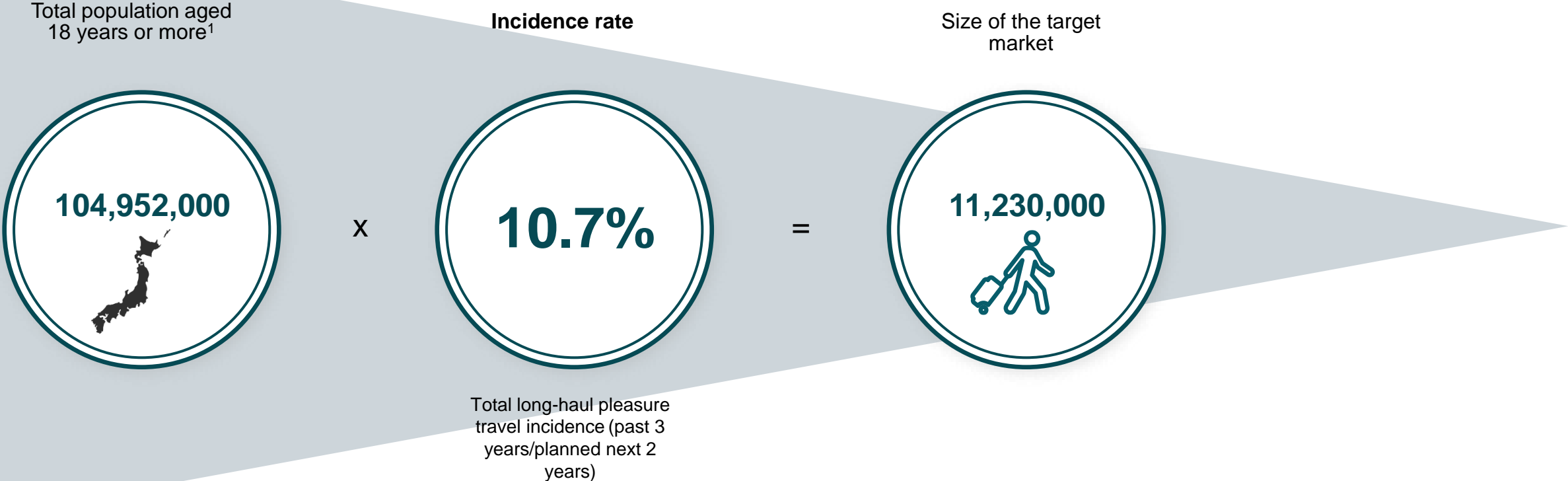


Total long-haul pleasure travel incidence (past 3 years/planned next 2 years)

5 [^] Long-haul = outside of East Asia (e.g., China, Hong Kong, Macau, Japan, South Korea and Taiwan)
Note: Results are from 2023 YouGov Canada Omnibus Survey
Base: General population aged 18+ (n=2524)



Long-Haul Pleasure Traveller Sizing

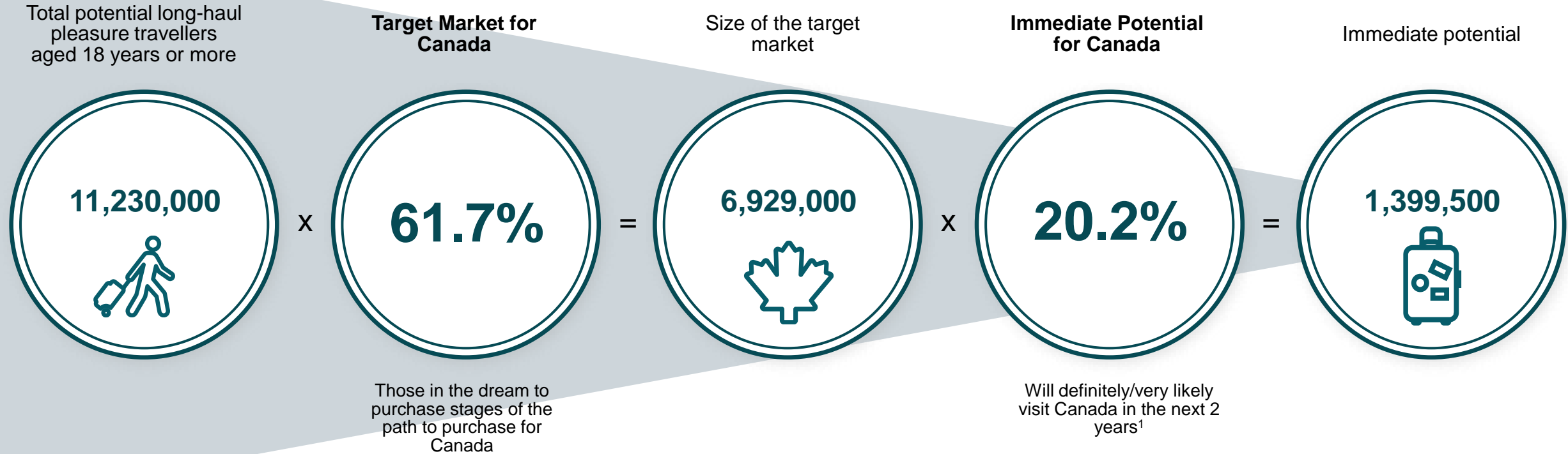


6 ¹Source: Estimates 2020 Census, Statistics Bureau of Japan
Note: Results are from 2024 YouGov Canada Omnibus Survey
Base: General population aged 18+ (n=2524)



Potential Market Size For Canada

Size of the Potential Market to Canada (Next 2 Years)

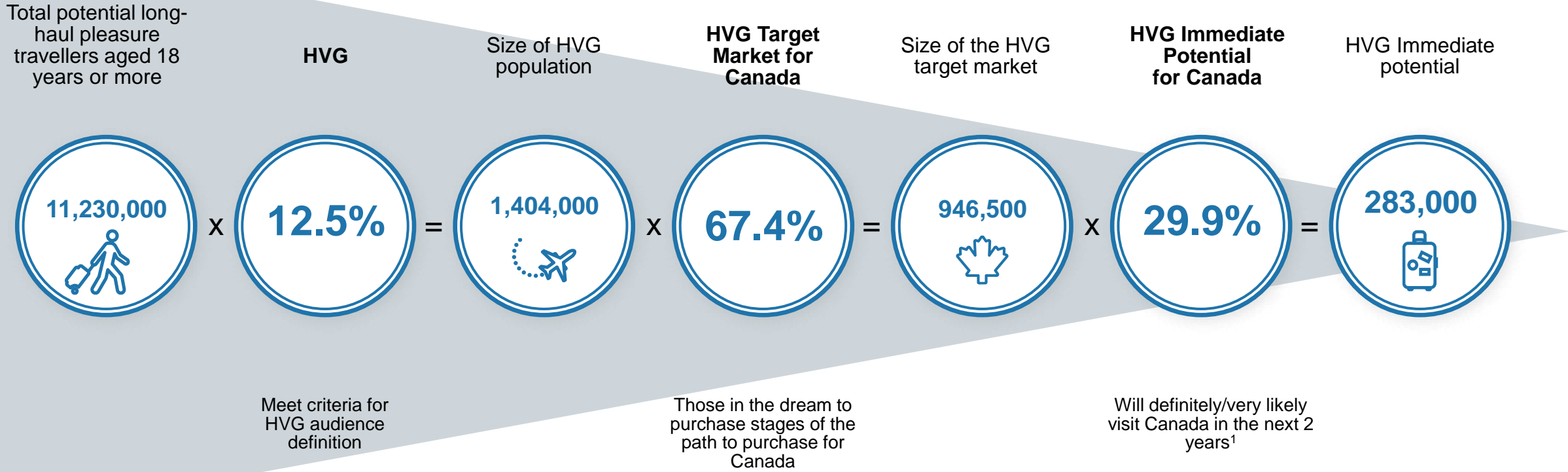


7 ¹ Includes respondents likely to visit Canada for a trip of 1 to 3 nights, or a trip of 4 nights or more.
Base: Target market for Canada = Long-haul pleasure travellers (past 3 years or next 2 years) (n=1501); Immediate potential for Canada = dream to purchase stages for P2P for Canada (n=926)
C1. Which of the following best describes your current situation when thinking about each of the following destinations for a holiday trip? (Select one for each)
E1. Realistically, how likely are you to take a holiday trip to Canada in the **next 2 years**? (Select one)



Potential Market Size For Canada

Size of the Potential Market to Canada (Next 2 Years): *HVG Audience*



¹ Includes respondents likely to visit Canada for a trip of 1 to 3 nights, or a trip of 4 nights or more.
 Base: Target market for Canada = long-haul pleasure travellers (past 3 years or next 2 years), HVG Audience (n=189); Immediate potential for Canada = dream to purchase stages for P2P for Canada (n=128)
 C1. Which of the following best describes your current situation when thinking about each of the following destinations for a holiday trip? (Select one for each)
 E1. Realistically, how likely are you to take a holiday trip to Canada in the **next 2 years**? (Select one)



Potential Market Size for the Regions

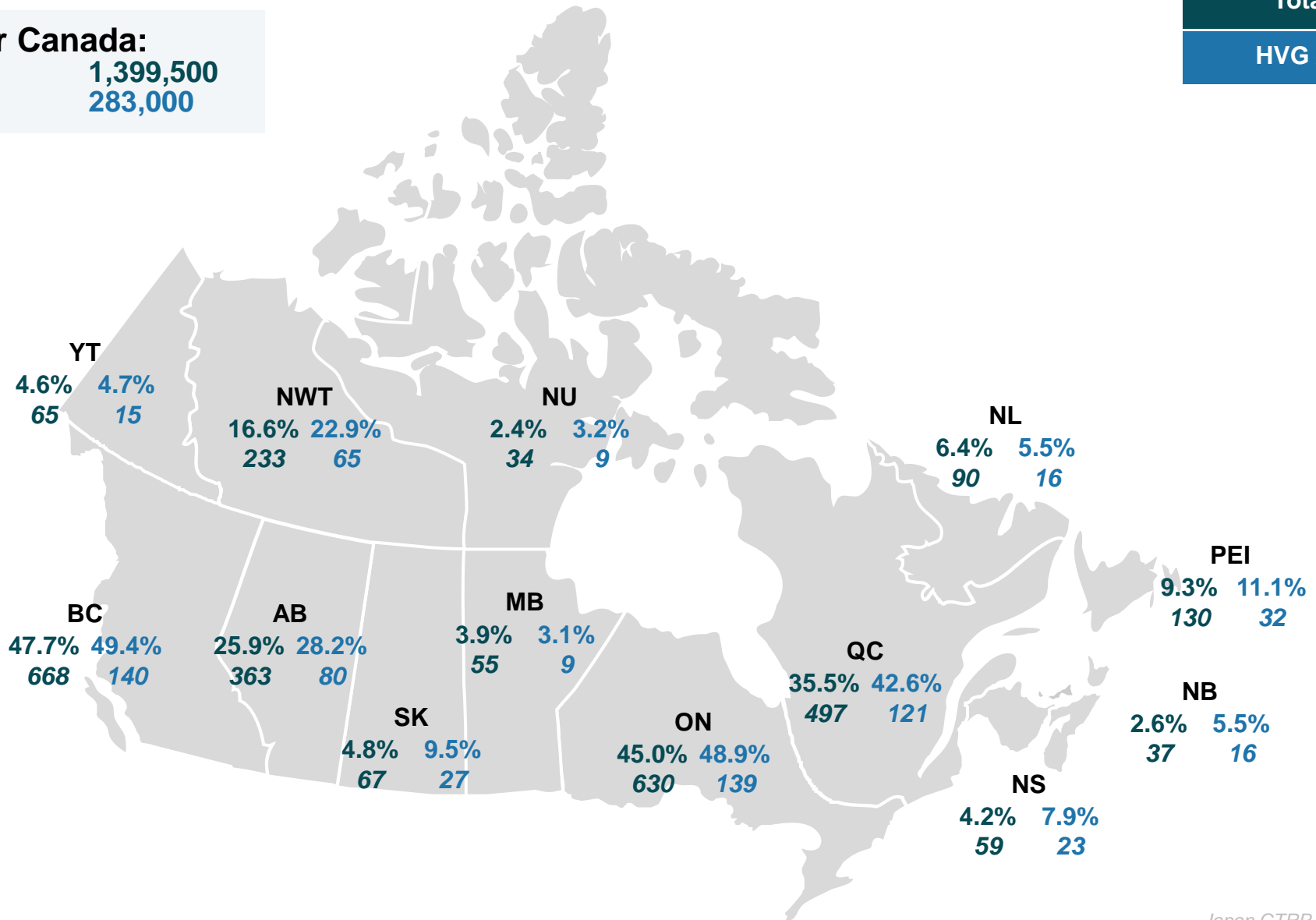


Total Japan

HVG Audience

Immediate Potential for Canada:
Total Japan: 1,399,500
HVG Audience: 283,000

Key:
 % likely to visit region
 Immediate potential (000s)





Key Performance Indicators



Prince Albert National Park
Saskatchewan



Key Performance Indicators

Indicator	Definition	All Long-haul Travellers (n=1501)	HVG Audience (n=189)
Unaided destination consideration	% who mentioned Canada or a destination in Canada on their consideration list ¹	4%	4%
Aided destination consideration	% who rate Canada 4 or 5 (I am seriously considering) out of 5	22%	26%
Aided awareness of travel opportunities in Canada	% with excellent/very good knowledge of travel opportunities in Canada	8%	20%+
Past visitation	% who have ever visited Canada for pleasure	25%	33%+

¹ For trips in the next 2 years.

Base: Long-haul pleasure travellers (past 3 years or next 2 years)

B1. You mentioned that you are likely to take a long-haul holiday trip **outside of East Asia (e.g., China, Hong Kong, Macau, Japan, South Korea and Taiwan)** in the next 2 years. Which destinations are you seriously considering? (Please list up to 3 destinations)

C2. You may have already mentioned this before, but would you consider visiting each of the following destinations in the next 2 years? Please use a 5-point scale where 1 means 'I am definitely not considering' and 5 means 'I am seriously considering'.

C5. How would you rate your level of knowledge of holiday opportunities in each of the following destinations? (Select one for each)

B5. Which of the following countries or regions have you visited while on a holiday trip **outside of East Asia (e.g., China, Hong Kong, Macau, Japan, South Korea and Taiwan)** which was 4 or more nights long?



Key Performance Indicators: Seasonal & Indigenous



Indicator	Definition	All Long-haul Travellers	HVG Audience
Unaided <u>fall</u> destination	% who mentioned Canada or a destination in Canada ¹	10%	10%
Aided destination consideration for <u>fall</u>	% consider Canada for the months of September, October and/or November ²	30%	30%
Unaided <u>winter</u> destination	% who mentioned Canada or a destination in Canada ¹	15%	22%
Aided destination consideration for <u>winter</u>	% consider Canada for the months of December, January and/or February ²	15%	18%
Unaided <u>Indigenous Tourism</u> destination	% who mentioned Canada or a destination in Canada	3%	5%

¹Among respondents who answered about winter/fall travel

²Among those in the dream to purchase stages of the path to purchase to Canada

Base: Long-haul pleasure travellers (past 3 years or next 2 years)

B2. What destinations come to mind when thinking about travel to experience the **winter** season? Total (n=752); HVG (n=88)

B3. What destinations come to mind when thinking about travel to experience the **autumn** season? Total (n=749); HVG (n=101)

C7. For each of the following destinations, during which months would you consider taking a vacation trip in the **next 2 years**? Total (n=926); HVG (n=128)

B4. What destinations come to mind when thinking about **Indigenous tourism**? Total (n=1501); HVG (n=189)





Market Outlook



St. John's

Newfoundland and Labrador



Market Outlook

Indicator	Definition	All Long-haul Travellers (n=1501)	HVG Audience (n=189)
Incidence of long-haul pleasure travel	% who have taken a long-haul pleasure trip in the past 3 years	65%	100% +
Long-haul travel intentions	% who plan ¹ to take a long-haul pleasure trip in the next 2 years	71%	100% +
Market Outlook (Net change in long-haul travel)	% who will <u>spend a little more</u> on travel outside of East Asia (e.g., China, Hong Kong, Macau, Japan, South Korea and Taiwan) in the next 12 months MINUS % who will <u>spend a little less</u>	-25%	-4%

¹ Who are 'Definitely' or 'Very Likely' to take a long-haul trip in the next 2 years.

Base: Long-haul pleasure travellers (past 3 years or next 2 years)

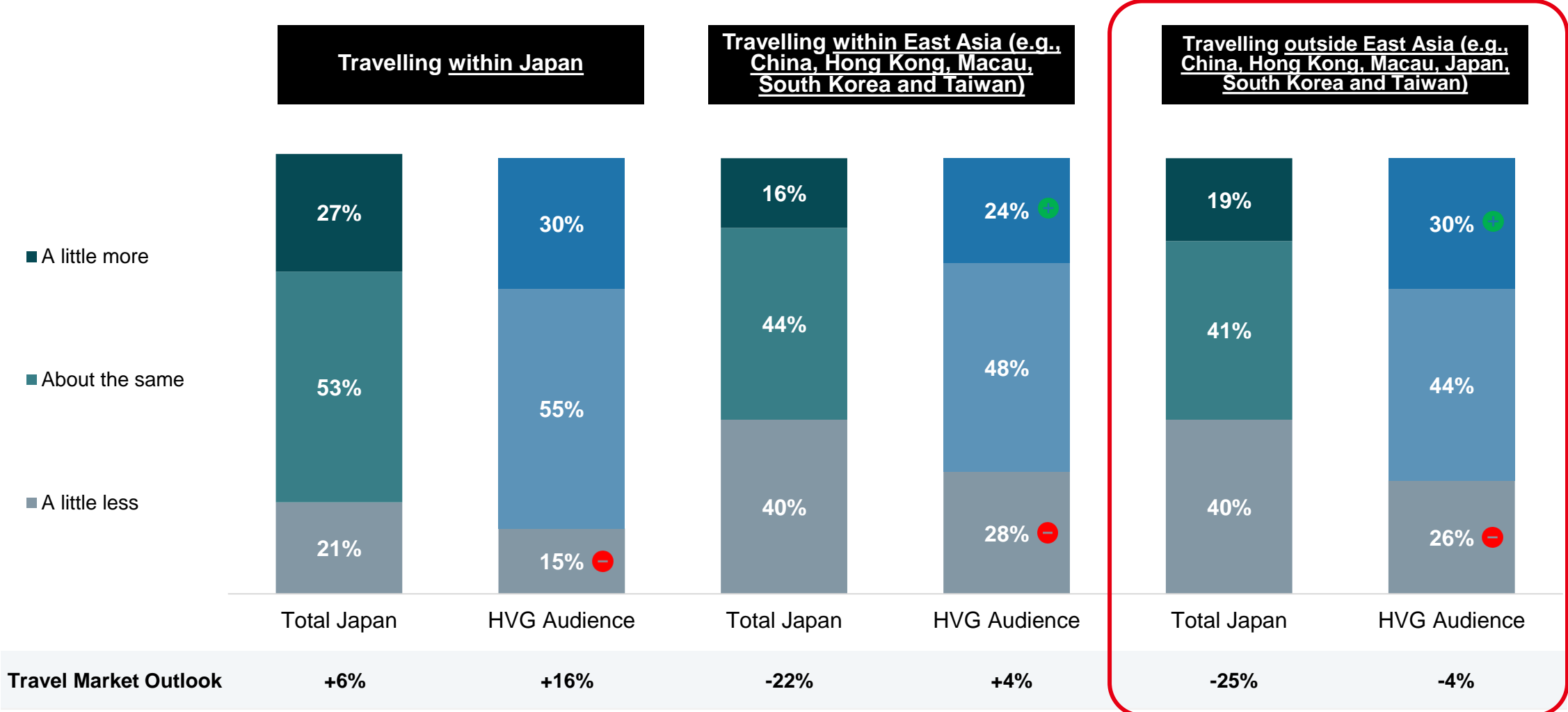
A7. In the past 3 years, have you taken a long-haul holiday trip of 4 or more nights **outside of East Asia (e.g., China, Hong Kong, Macau, Japan, South Korea and Taiwan)** where you spent at least 1 night in paid accommodations? (Select one only)

A9. In the next 2 years, how likely is it that you will take a long-haul holiday trip of 4 or more nights **outside of East Asia (e.g., China, Hong Kong, Macau, Japan, South Korea and Taiwan)** where you will spend at least 1 night in paid accommodations? (Select one only)

A5. How would you describe your spending intentions on the following items in the next 12 months compared to the 12 months? Will you spend...



Spending Intentions (in Next 12 Months)

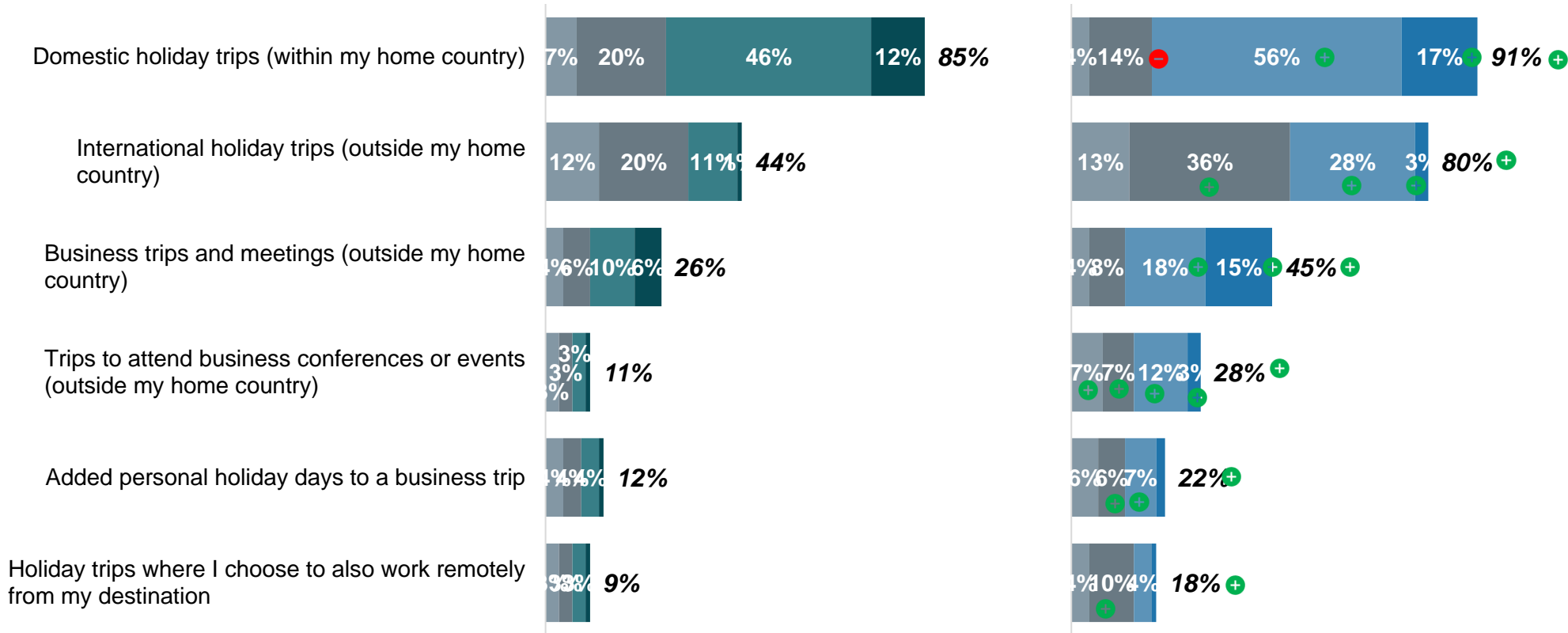


Types of Travel Trips

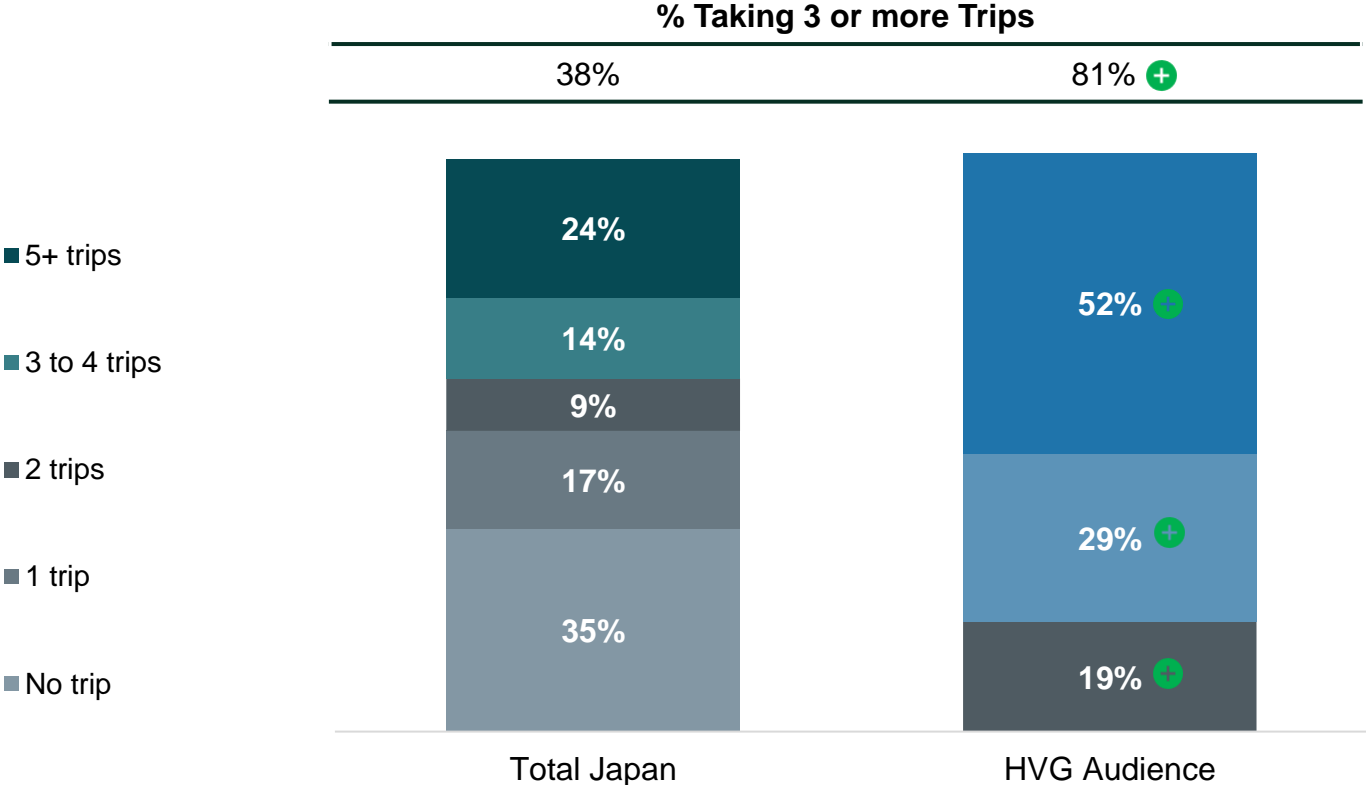
Total Japan

HVG Audience

■ Sometimes (once every 2 years)
 ■ Regularly (once a year)
 ■ Often (several times a year)
 ■ Very often (about once a month or more)
 ■ At least every 2 years



Long-Haul Travel Intensity





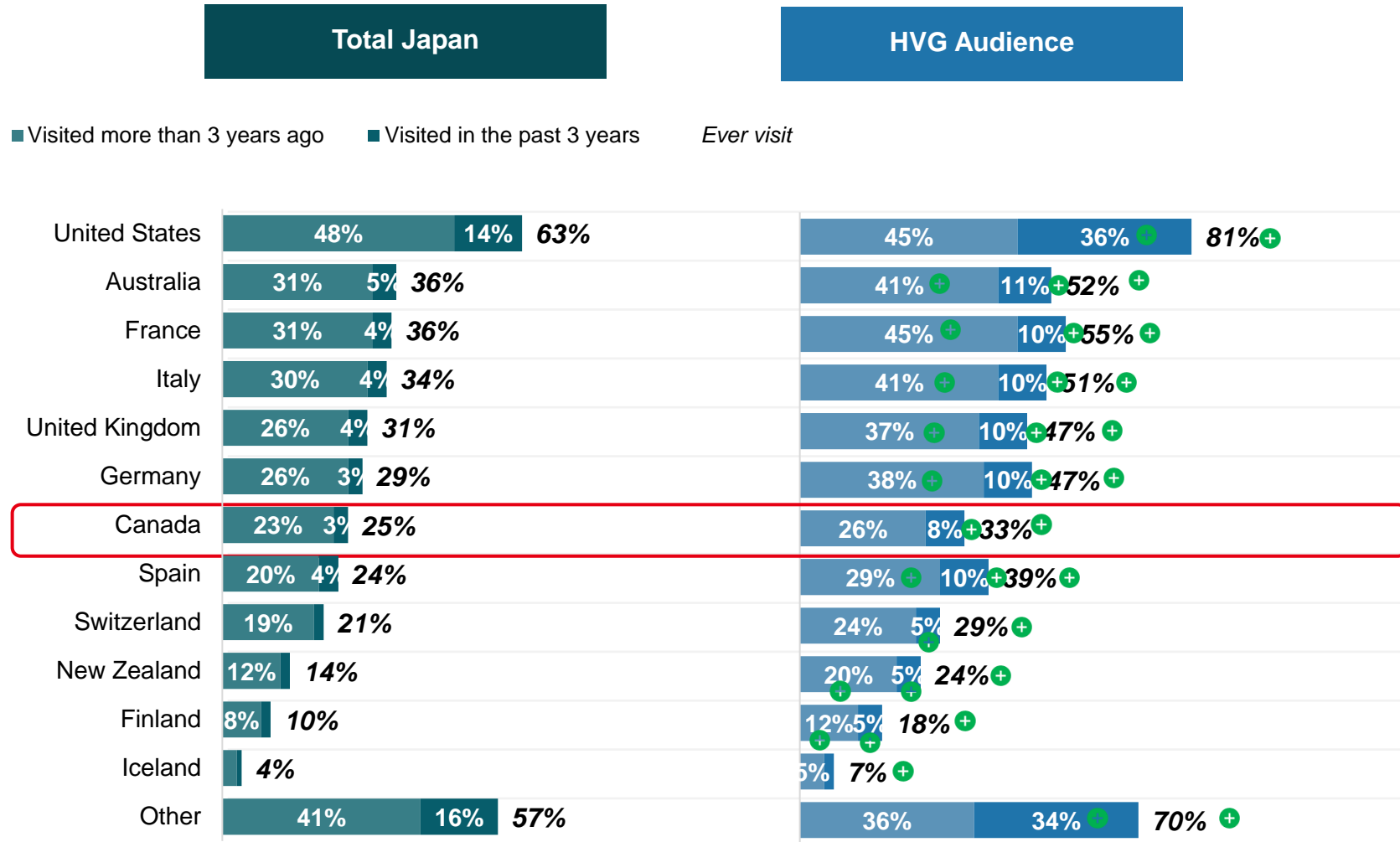
Canada vs. Competitors



Peggy's Cove
Nova Scotia



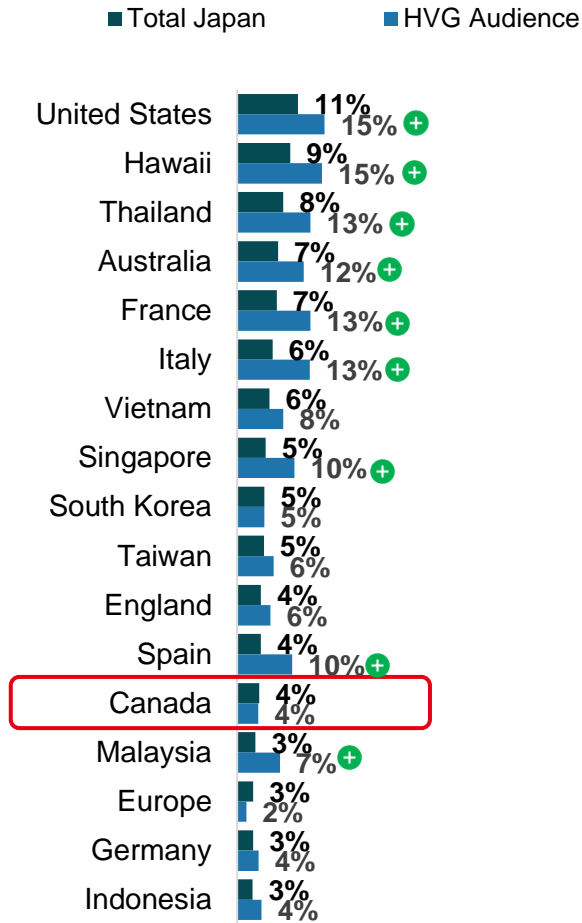
Past Visitation



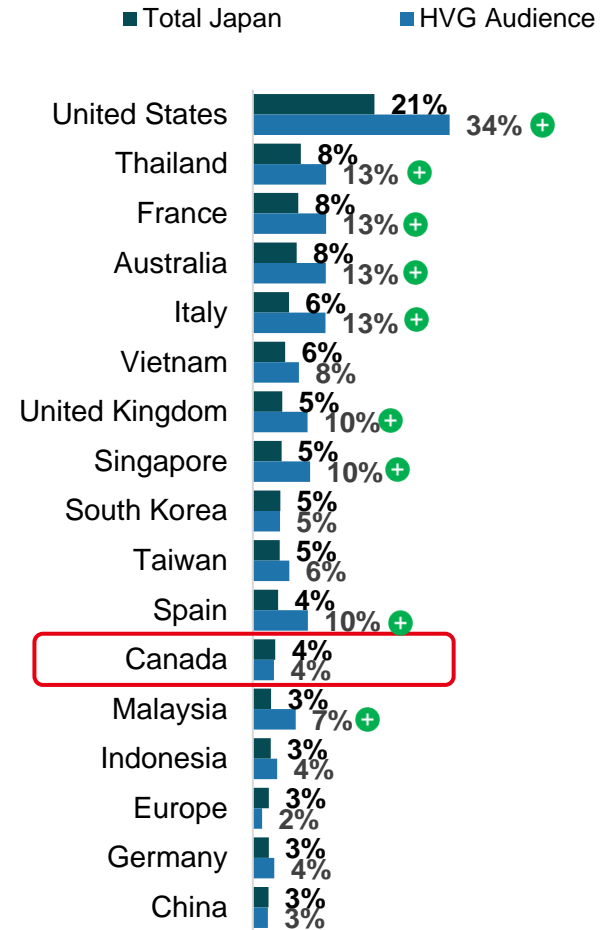
Unaided Long-Haul Destination Consideration (Next 2 Years)



Top Destination Brands¹



Top Destinations²



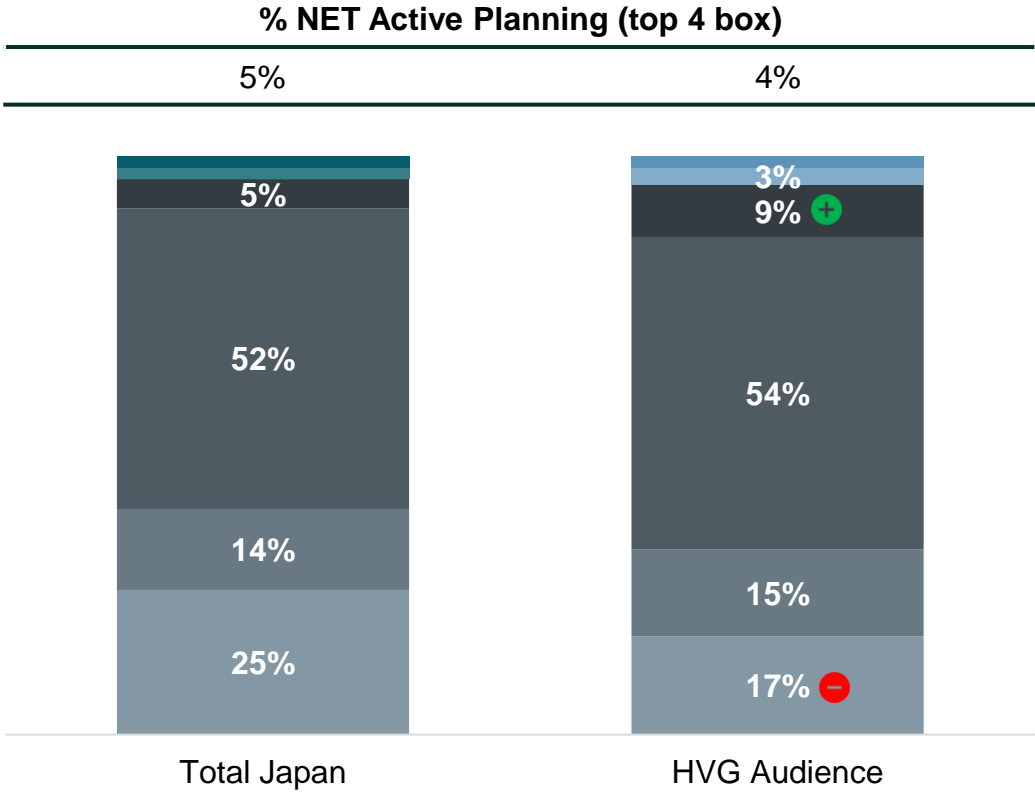
¹ Responses as mentioned by respondents (e.g., percentage who said "Canada" specifically).
² Roll-up of brand mentions by country (e.g., percentage who said "Canada" or any destination in Canada).
 Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1501); HVG (n=189)
 B1. You mentioned that you are likely to take a long-haul holiday trip in the next 2 years. Which destinations are you seriously considering? (Please list up to 3 destinations)



Path to Purchase for Canada



- Have already booked my transportation and accommodations
- Am currently making transportation and accommodation arrangements
- Am planning the itinerary for a trip to this country
- Have started to gather some travel information for a trip to this country
- Seriously considering visiting / returning in the next 2 years
- Dreaming about visiting / returning someday
- Not interested in visiting / returning in the foreseeable future
- Have never thought of taking a trip to this destination



21 Note: all respondents evaluated Canada plus 3 randomly selected countries from the competitive set. Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1501); HVG (n=189)

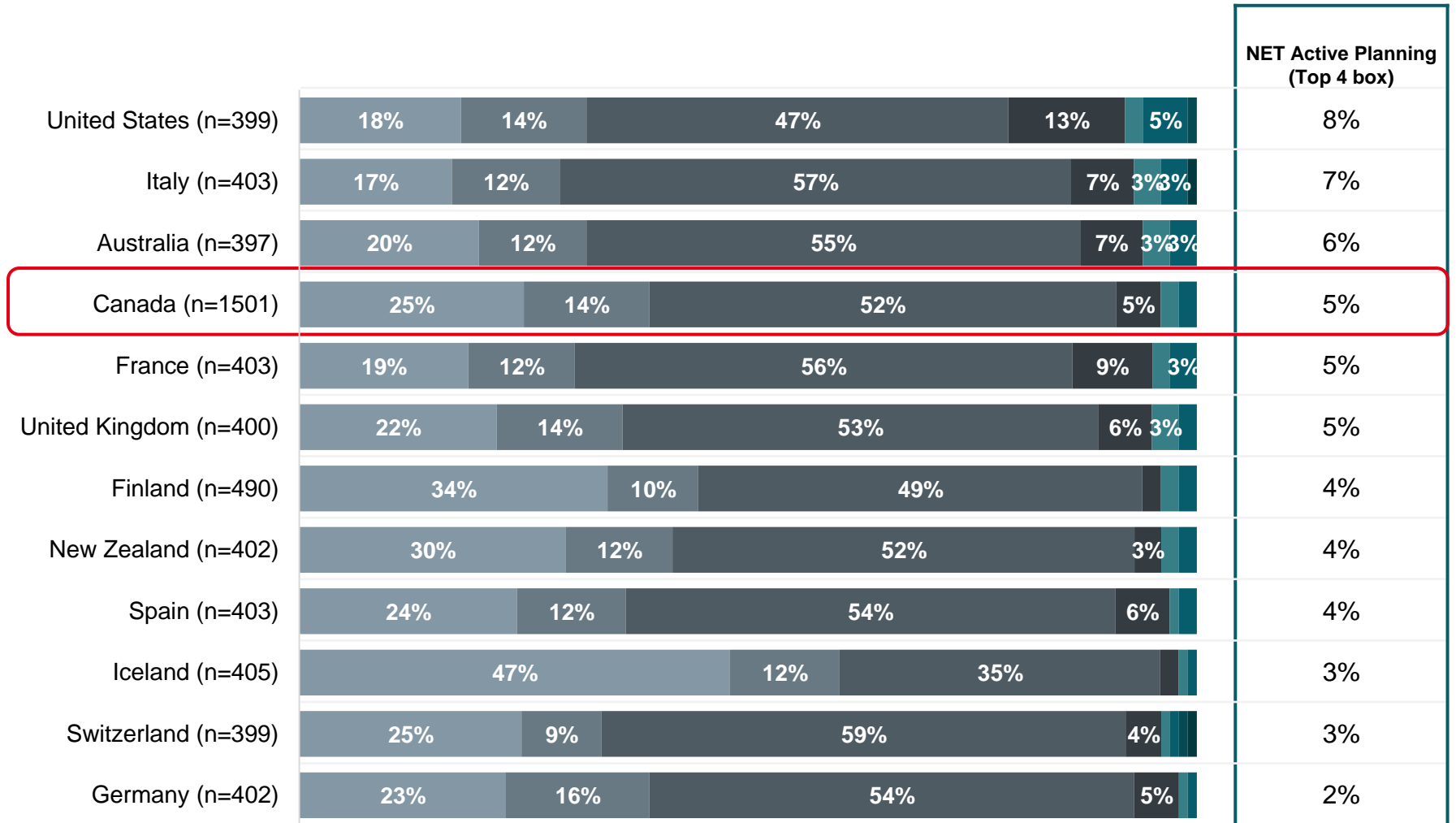
C1. Which of the following best describes your current situation when thinking about each of the following destinations for a holiday trip? (Select one for each)



Stage in the Purchase Cycle: Total Japan



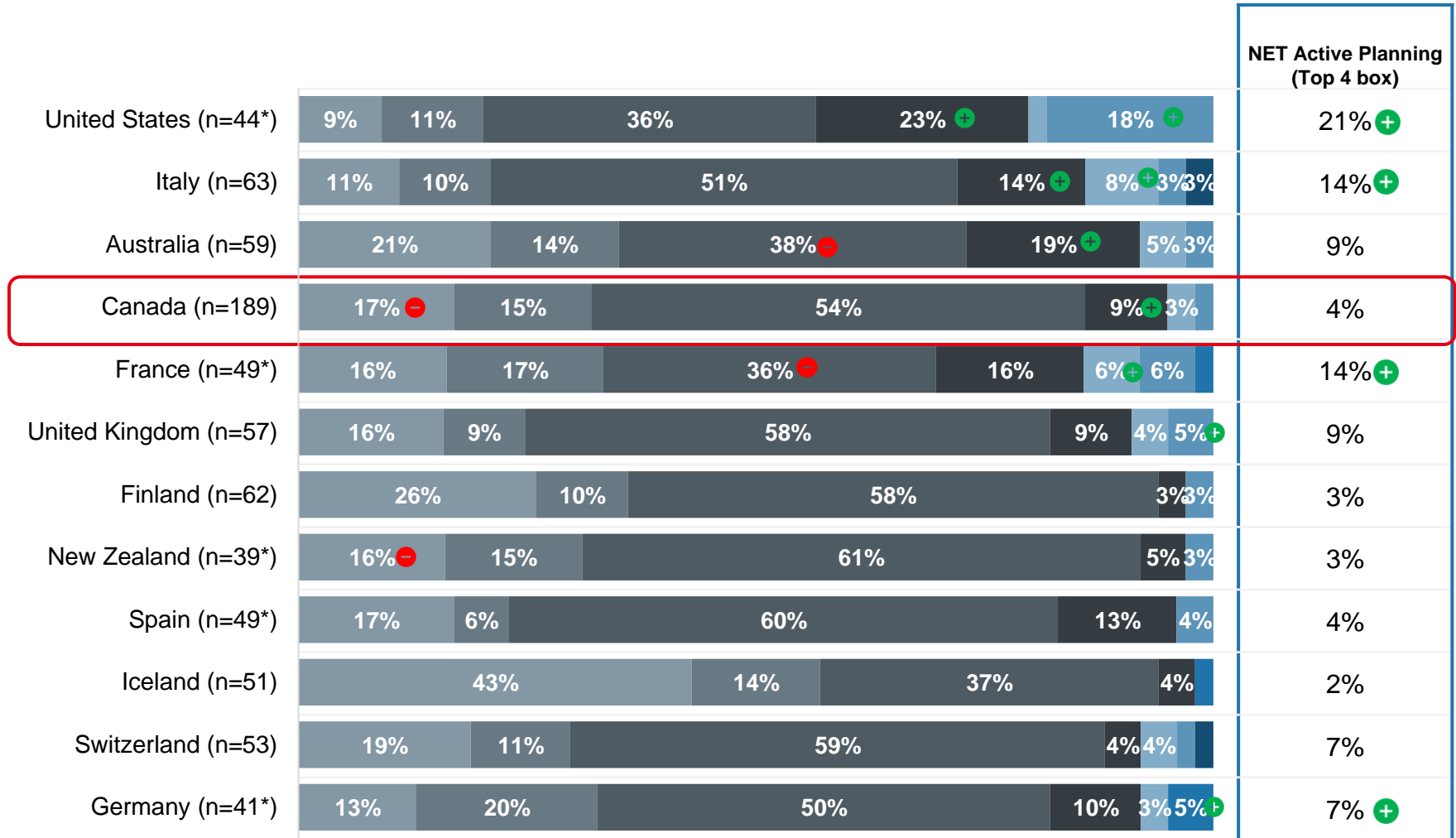
- Have never thought of taking a trip to this destination
- Not interested in visiting / returning in the foreseeable future
- Dreaming about visiting / returning someday
- Seriously considering visiting / returning in the next 2 years
- Have started to gather some travel information for a trip to this country
- Am planning the itinerary for a trip to this country
- Am currently making transportation and accommodation arrangements
- Have already booked my transportation and accommodations



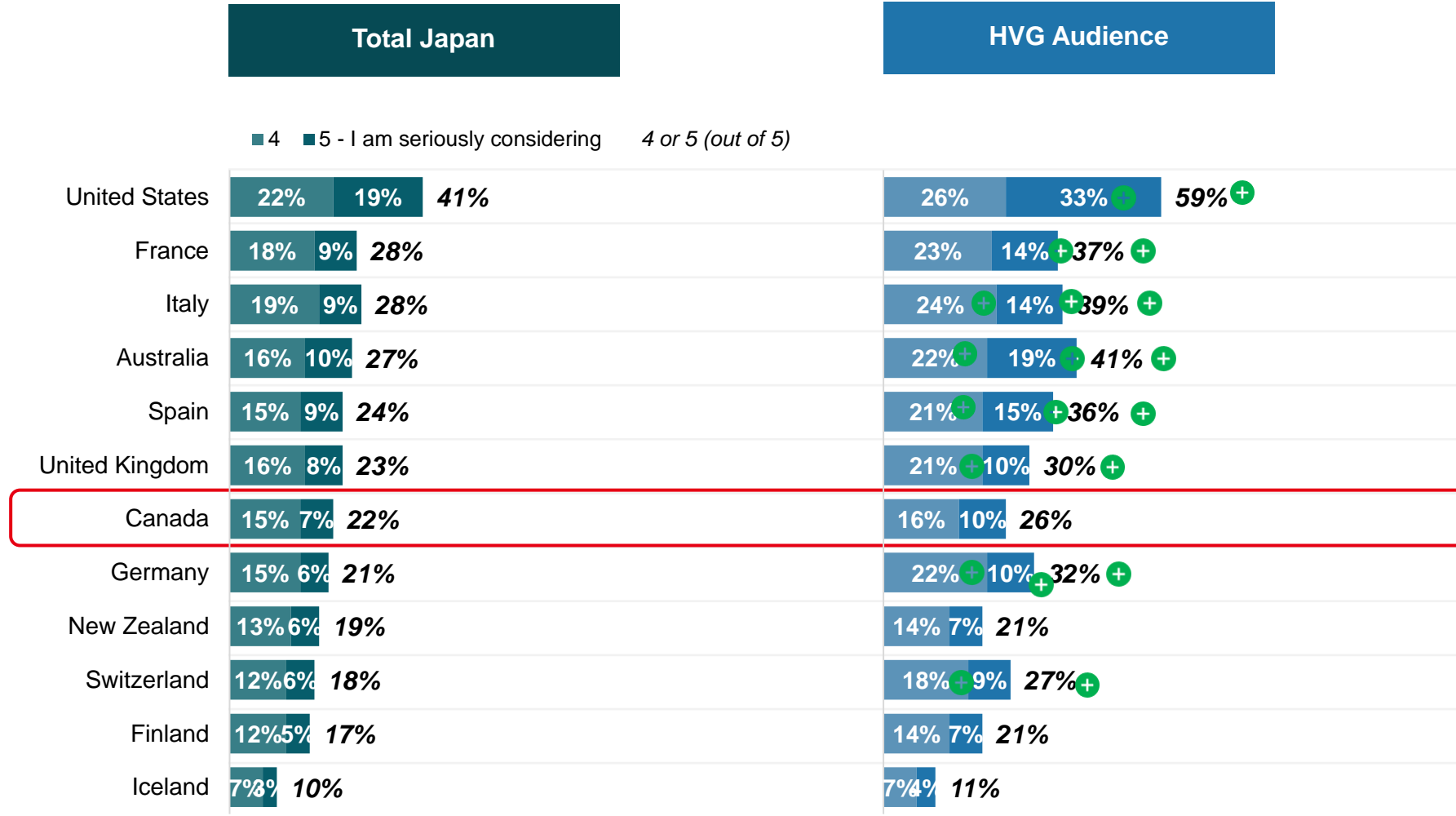
Stage in the Purchase Cycle: Among HVG Audience



- Have never thought of taking a trip to this destination
- Not interested in visiting / returning in the foreseeable future
- Dreaming about visiting / returning someday
- Seriously considering visiting / returning in the next 2 years
- Have started to gather some travel information for a trip to this country
- Am planning the itinerary for a trip to this country
- Am currently making transportation and accommodation arrangements
- Have already booked my transportation and accommodations



Destination Consideration (Next 2 Years)



Destination Consideration By Seasons



Total Japan	Winter (Dec, Jan, Feb)	Spring (Mar, Apr, May)	Summer (Jun, Jul, Aug)	Fall (Sept, Oct, Nov)	HVG Audience	Winter (Dec, Jan, Feb)	Spring (Mar, Apr, May)	Summer (Jun, Jul, Aug)	Fall (Sept, Oct, Nov)
Australia (n=270)	29%	27%	14%	26%	Australia (n=39*)	34%	29%	21%	24%
Canada (n=926)	15%	21%	35%	30%	Canada (n=128)	18%	20%	39%	30%
Finland (n=274)	22%	17%	34%	23%	Finland (n=40*)	33%	18%	42%	23%
France (n=281)	15%	25%	31%	28%	France (n=33*)	21%	24%	45%	36%
Germany (n=246)	13%	26%	30%	34%	Germany (n=28*)	15%	8%	45%	41%
Iceland (n=164)	20%	18%	32%	23%	Iceland (n=22**)	**	**	**	**
Italy (n=286)	10%	33%	28%	28%	Italy (n=50)	24% +	40%	40% +	30%
New Zealand (n=236)	32%	22%	22%	23%	New Zealand (n=27*)	41%	15%	26%	34%
Spain (n=260)	14%	28%	30%	29%	Spain (n=38*)	24%	35%	38%	27%
Switzerland (n=263)	13%	21%	41%	24%	Switzerland (n=37*)	24% +	16%	30%	22%
United Kingdom (n=254)	15%	25%	37%	25%	United Kingdom (n=43*)	16%	23%	51% +	37%
United States (n=271)	17%	26%	33%	27%	United States (n=35*)	23%	31%	40%	43% +

25

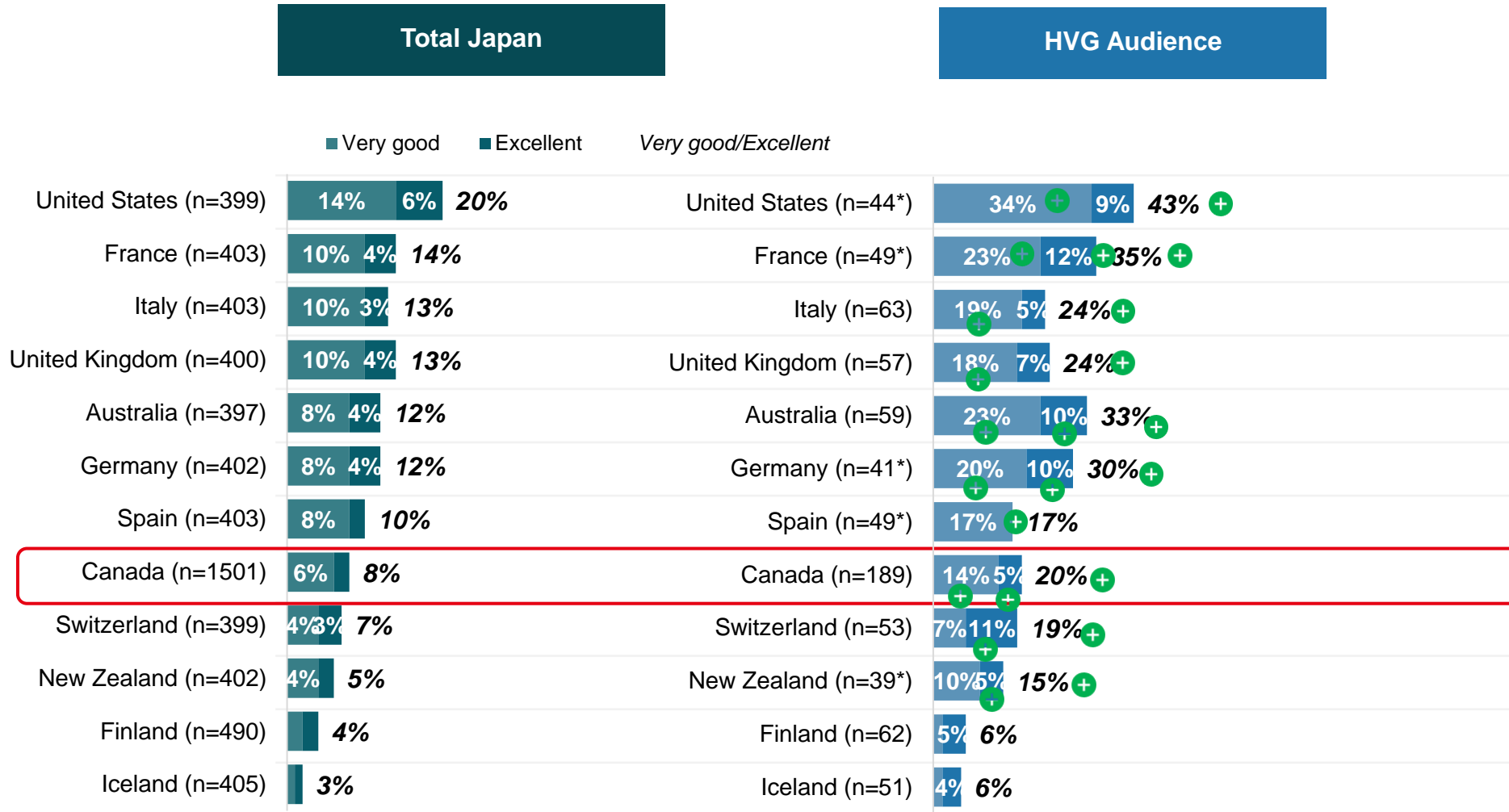
Note: all respondents evaluated Canada plus 3 randomly selected countries from the competitive set.
 Base: Long-haul pleasure travellers (past 3 years or next 2 years), Those in the dream to purchase stages of the path to purchase for [DESTINATION] C7. For each of the following destinations, during which months would you consider taking a holiday trip in the next 2 years?
 *Small base size, interpret with caution (n<50), **Base size too small to report (n<25)

Japan GTRP – April 2024



+ / - = significantly higher/lower result (vs. Total)

Knowledge of Holiday Opportunities



Note: all respondents evaluated Canada plus 3 randomly selected countries from the competitive set.
 Base: Long-haul pleasure travellers (past 3 years or next 2 years), Evaluated [DESTINATION]
 C5. How would you rate your level of knowledge of holiday opportunities in each of the following destinations? (Select one for each)
 *Small base size, interpret with caution (n<50)



Destination Fit



Total Japan

HVG Audience

8 9 10 - Exactly what I'm looking for Top 3 box

Country (n)	8	9	10 - Exactly what I'm looking for	Total	Country (n)	8	9	10 - Exactly what I'm looking for	Total
Italy (n=403)	17%	5%	12%	33%	Italy (n=63)	27%+	5%	16%	47%+
Spain (n=403)	15%	9%	8%	32%	Spain (n=49*)	21%	8%	13%	42%
United States (n=399)	15%	6%	11%	31%	United States (n=44*)	9%	9%	18%	36%
Australia (n=397)	17%	6%	6%	29%	Australia (n=59)	27%+	12%	9%	48%+
France (n=403)	13%	5%	11%	29%	France (n=49*)	16%	6%	16%	39%
United Kingdom (n=400)	10%	5%	9%	25%	United Kingdom (n=57)	14%	10%	12%	37%+
New Zealand (n=402)	12%	5%	7%	24%	New Zealand (n=39*)	18%	5%	10%	34%
Switzerland (n=399)	15%	4%	5%	23%	Switzerland (n=53)	22%	4%	7%	34%
Canada (n=1501)	12%	5%	6%	22%	Canada (n=189)	16%	5%	11%	32%+
Germany (n=402)	11%	4%	5%	20%	Germany (n=41*)	10%	8%	15%	33%
Finland (n=490)	9%	3%	4%	16%	Finland (n=62)	7%	5%	5%	16%
Iceland (n=405)	5%	3%	3%	11%	Iceland (n=51)	8%	4%	2%	14%

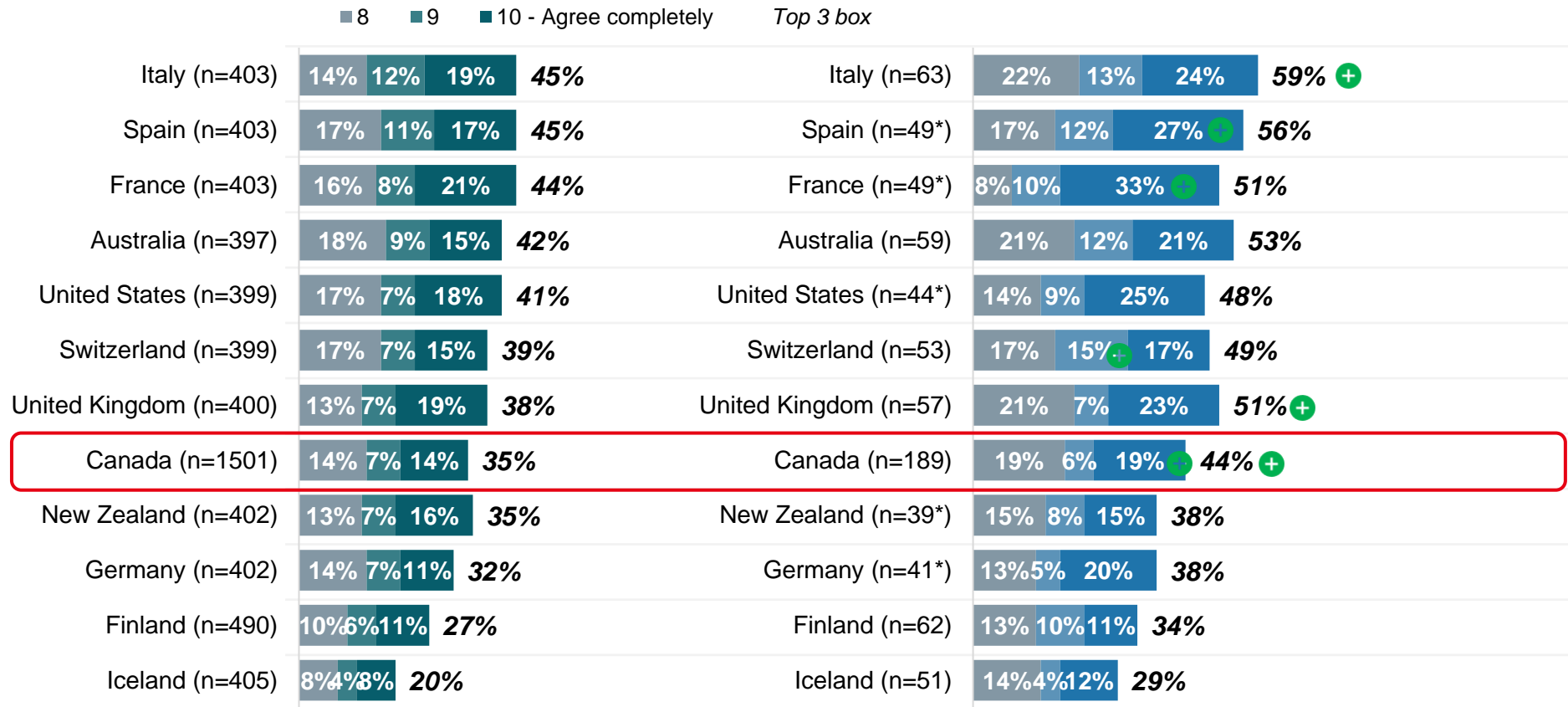
27 Note: all respondents evaluated Canada plus 3 randomly selected countries from the competitive set. Base: Long-haul pleasure travellers (past 3 years or next 2 years), Evaluated [DESTINATION] C3. Please rate each destination in terms of what you are looking for in a holiday destination. *Small base size, interpret with caution (n<50)



Destination Appeal

Total Japan

HVG Audience



Net Promoter Score (NPS)

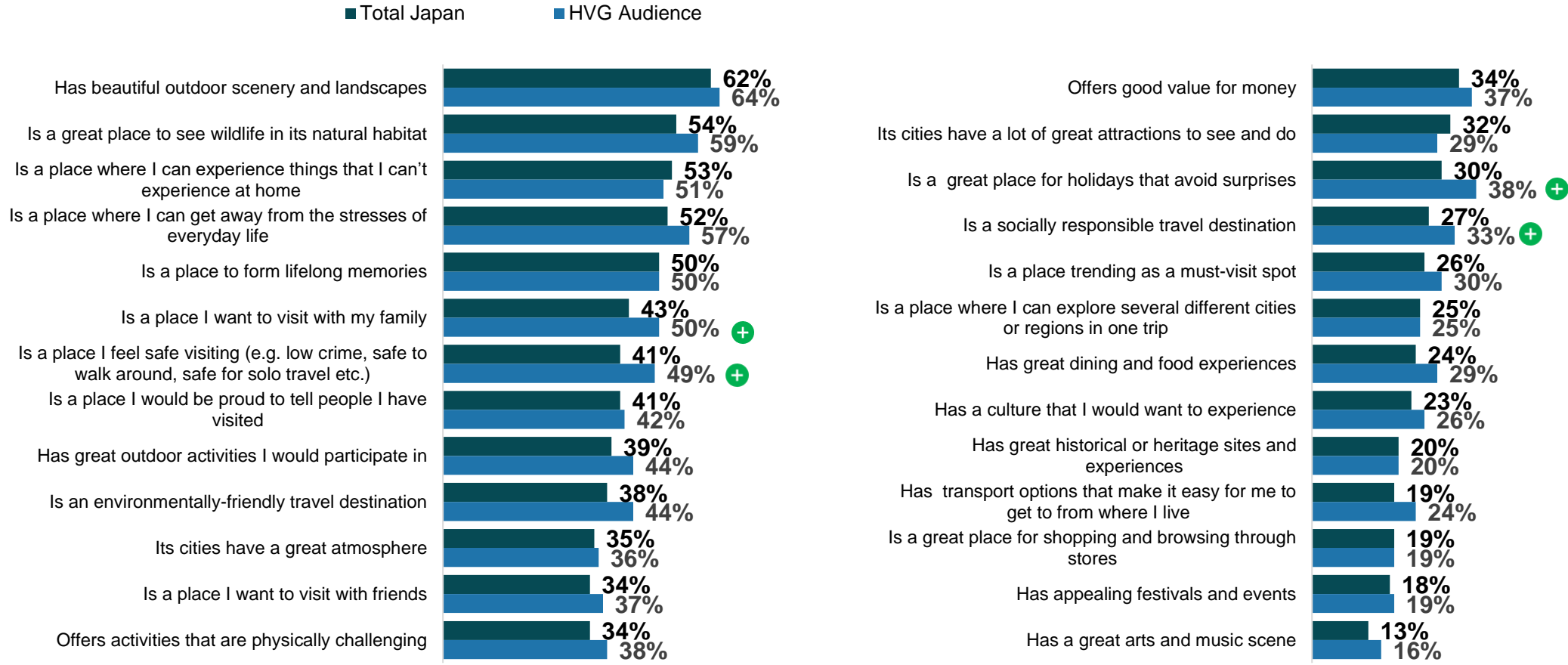


Total Japan				HVG Audience					
	Detractors (0-6)	Passives (7-8)	Promoters (9-10)	NPS		Detractors (0-6)	Passives (7-8)	Promoters (9-10)	NPS
Iceland (n=62)	29%	35%	36%	+7%	Iceland (n=14**)	**	**	**	**
Italy (n=509)	33%	33%	34%	+1%	Italy (n=96)	32%	30%	37%	+5%
Finland (n=145)	33%	35%	32%	-1%	Finland (n=33*)	21%	48%	31%	+9%
Spain (n=355)	35%	32%	33%	-2%	Spain (n=74)	31%	31%	38%	+7%
Canada (n=378)	33%	39%	28%	-6%	Canada (n=64)	22%	38%	40%	+18%
New Zealand (n=212)	42%	27%	32%	-10%	New Zealand (n=46*)	33%	30%	37%	+4%
Switzerland (n=317)	38%	34%	28%	-10%	Switzerland (n=55)	35%	36%	29%	-5%
Australia (n=536)	38%	34%	28%	-11%	Australia (n=99)	26%	34%	40%	+13%
France (n=535)	38%	34%	27%	-11%	France (n=104)	33%	38%	29%	-4%
United States (n=942)	42%	32%	26%	-16%	United States (n=153)	36%	31%	33%	-2%
Germany (n=441)	44%	34%	22%	-22%	Germany (n=89)	36%	39%	25%	-12%
United Kingdom (n=462)	48%	29%	23%	-25%	United Kingdom (n=90)	42%	33%	26%	-16%

Note: all respondents evaluated countries they have ever visited from the competitive set.
 Base: Long-haul pleasure travellers (past 3 years or next 2 years), Visited [DESTINATION]
 C8. How likely are you to recommend each of the following holiday destinations to a friend, family member or colleague?
 *Small base size, interpret with caution (n<50), **Base size too small to report (n<25)



Impressions of Canada as a Holiday Destination



Note: all respondents evaluated Canada plus 3 randomly selected countries from the competitive set. Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1501); HVG (n=189) C6. We are interested in your general impressions about destinations even if you have never been there. Please select all the destinations you think apply to the statement. Select "None of these" if you think none of the destinations apply.



Destination Attributes – Relative Strengths & Weaknesses: Among Total Japan



		Canada	Australia	Finland	France	Germany	Iceland	Italy	New Zealand	Spain	Switzerland	United Kingdom	United States
	n=	1501	397	490	403	402	405	403	402	403	399	400	399
Higher Order Motivations	Is a place where I can get away from the stresses of everyday life			Strength			Strength				Strength		Weakness
	Is a place to form lifelong memories												
	Is a place I would be proud to tell people I have visited		Weakness				Strength						Weakness
General Needs	Is a place I feel safe visiting (e.g. low crime, safe to walk around, safe for solo travel etc.)	Strength	Strength	Strength	Weakness			Weakness	Strength	Weakness	Strength		Weakness
	Is a place where I can explore several different cities or regions in one trip	Weakness		Weakness	Strength	Strength	Weakness	Strength	Weakness	Strength		Strength	
	Offers good value for money												
	Has transport options that make it easy for me to get to from where I live			Weakness			Weakness				Weakness	Strength	Strength
Type of Trip	Is a place I want to visit with friends												
	Is a place I want to visit with my family												
	Is a great place for holidays that avoid surprises		Strength					Weakness	Strength	Weakness			
	Is a place where I can experience things that I can't experience at home			Strength			Strength						
	Is an environmentally-friendly travel destination	Strength		Strength	Weakness		Strength	Weakness	Strength	Weakness	Strength	Weakness	Weakness
	Is a socially responsible travel destination					Strength		Weakness		Weakness		Strength	
	Is a place trending as a must-visit spot				Strength			Strength					
To-Do	Offers activities that are physically challenging	Strength	Strength		Weakness	Weakness		Weakness	Strength	Weakness		Weakness	Strength
	Is a great place for shopping and browsing through stores	Weakness	Weakness	Weakness	Strength		Weakness	Strength	Weakness		Weakness	Strength	Strength
	Its cities have a lot of great attractions to see and do			Weakness			Weakness	Weakness	Weakness				Strength
	Has great outdoor activities I would participate in	Strength	Strength		Weakness	Weakness	Strength	Weakness	Strength	Weakness		Weakness	
	Has great dining and food experiences	Weakness		Weakness	Strength	Strength	Weakness	Strength	Weakness	Strength		Weakness	
	Has a great arts and music scene	Weakness	Weakness	Weakness	Strength	Strength	Weakness	Strength	Weakness	Strength	Weakness	Strength	Strength
	Has appealing festivals and events	Weakness	Weakness	Weakness	Strength	Strength		Weakness	Weakness	Strength	Weakness	Strength	Strength
To-See	Its cities have a great atmosphere		Weakness		Strength	Strength	Weakness	Strength	Weakness	Strength		Strength	
	Has beautiful outdoor scenery and landscapes			Strength			Strength	Weakness		Weakness	Strength		Weakness
	Is a great place to see wildlife in its natural habitat	Strength	Strength	Strength	Weakness	Weakness	Strength	Weakness	Strength	Weakness		Weakness	
	Has great historical or heritage sites and experiences	Weakness	Weakness	Weakness	Strength	Strength	Weakness	Strength	Weakness	Strength	Weakness	Strength	Weakness
	Has a culture that I would want to experience	Weakness								Strength			

Note: all respondents evaluated Canada plus 3 randomly selected countries from the competitive set. Base: Long-haul pleasure travellers (past 3 years or next 2 years), Evaluated [DESTINATION] C6. We are interested in your general impressions about destinations even if you have never been there. Please select all the destinations you think apply to the statement. Select "None of these" if you think none of the destinations apply.



Destination Attributes – Relative Strengths & Weaknesses : Among HVG Audience



		Canada	Australia	Finland	France	Germany	Iceland	Italy	New Zealand	Spain	Switzerland	United Kingdom	United States
	n=	189	59	62	49*	41*	51	63	39*	49*	53	57	44*
Higher Order Motivations	Is a place where I can get away from the stresses of everyday life			Strength		Weakness			Strength			Weakness	
	Is a place to form lifelong memories			Strength							Strength		Weakness
	Is a place I would be proud to tell people I have visited		Weakness	Strength			Strength						Weakness
General Needs	Is a place I feel safe visiting (e.g. low crime, safe to walk around, safe for solo travel etc.)	Strength		Strength	Weakness	Strength		Weakness	Strength	Weakness	Strength	Weakness	Weakness
	Is a place where I can explore several different cities or regions in one trip	Weakness	Weakness			Strength	Weakness	Strength	Weakness	Strength		Strength	
	Offers good value for money									Strength	Weakness		Weakness
Type of Trip	Has transport options that make it easy for me to get to from where I live		Strength	Weakness			Weakness		Weakness			Strength	
	Is a place I want to visit with friends							Strength					
	Is a place I want to visit with my family												
	Is a great place for holidays that avoid surprises	Strength	Strength			Strength		Weakness	Strength	Weakness			Weakness
	Is a place where I can experience things that I can't experience at home		Weakness	Strength			Strength						
	Is an environmentally-friendly travel destination	Strength		Strength	Weakness		Strength	Weakness	Strength	Weakness	Strength	Weakness	Weakness
	Is a socially responsible travel destination					Strength		Weakness		Weakness		Strength	
To-Do	Is a place trending as a must-visit spot		Weakness		Strength	Weakness		Strength					Strength
	Offers activities that are physically challenging	Strength	Strength		Weakness	Weakness		Weakness	Strength	Weakness		Weakness	
	Is a great place for shopping and browsing through stores	Weakness		Weakness	Strength		Weakness	Strength	Weakness	Strength	Weakness	Strength	Strength
	Its cities have a lot of great attractions to see and do	Weakness		Weakness	Strength	Weakness	Weakness	Strength	Weakness	Strength			Strength
	Has great outdoor activities I would participate in	Strength	Strength		Weakness	Weakness	Strength	Weakness		Weakness	Strength	Weakness	
	Has great dining and food experiences			Weakness	Strength	Strength	Weakness	Strength	Weakness	Strength	Weakness	Weakness	Weakness
	Has a great arts and music scene	Weakness	Weakness	Weakness	Strength	Strength	Weakness	Strength	Weakness	Strength		Strength	Strength
To-See	Has appealing festivals and events	Weakness		Weakness	Strength	Strength		Weakness	Weakness	Strength	Weakness	Weakness	Strength
	Its cities have a great atmosphere		Weakness	Weakness	Strength			Weakness	Weakness	Strength		Strength	
	Has beautiful outdoor scenery and landscapes			Strength		Weakness	Strength	Weakness	Weakness	Weakness	Strength		
	Is a great place to see wildlife in its natural habitat	Strength	Strength	Strength	Weakness	Weakness	Strength	Weakness	Strength	Weakness		Weakness	
	Has great historical or heritage sites and experiences	Weakness	Weakness	Weakness	Strength	Strength		Strength	Weakness	Strength		Strength	Weakness
	Has a culture that I would want to experience	Weakness				Strength					Weakness		

Note: all respondents evaluated Canada plus 3 randomly selected countries from the competitive set.
 Base: Long-haul pleasure travellers (past 3 years or next 2 years), HVG Audience, Evaluated [DESTINATION]

C6. We are interested in your general impressions about destinations even if you have never been there. Please select all the destinations you think apply to the statement.
 Select "None of these" if you think none of the destinations apply.

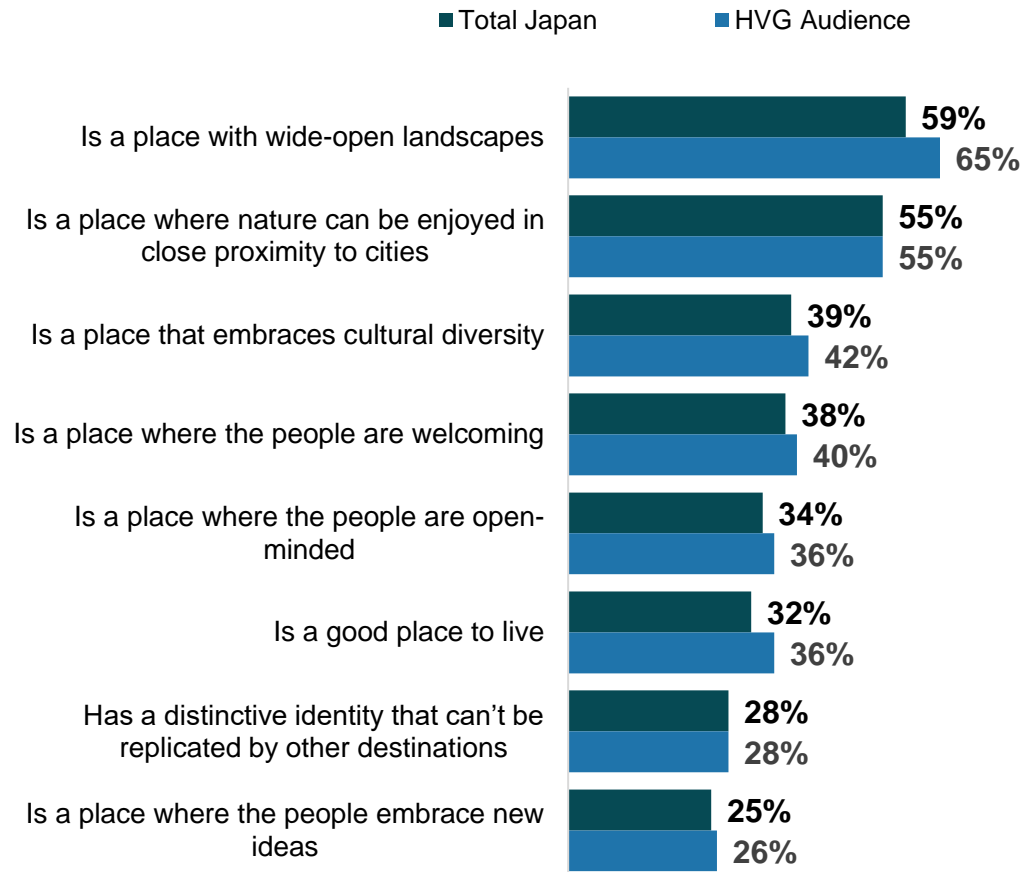
*Small base size, interpret with caution (n<50)

Strength **Weakness**

Japan GTRP – April 2024



Brand Value Statements for Canada



33 Note: all respondents evaluated Canada plus 3 randomly selected countries from the competitive set. Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1501); HVG (n=189) C6. We are interested in your general impressions about destinations even if you have never been there. Please select all the destinations you think apply to the statement. Select "None of these" if you think none of the destinations apply.



Brand Value Statements: Among Total Japan



	Canada	Australia	Finland	France	Germany	Iceland	Italy	New Zealand	Spain	Switzerland	United Kingdom	United States
n=	1501	397	490	403	402	405	403	402	403	399	400	399
Is a place with wide-open landscapes	Strength		Strength	Weakness	Weakness	Strength	Weakness	Strength	Weakness	Strength	Weakness	
Is a place where nature can be enjoyed in close proximity to cities	Strength			Weakness			Weakness	Strength	Weakness	Strength		
Is a place that embraces cultural diversity						Weakness						Strength
Is a place where the people are welcoming		Strength		Weakness				Strength			Weakness	
Is a place where the people are open-minded		Strength		Weakness	Weakness			Strength		Weakness	Weakness	Strength
Is a place where the people embrace new ideas												Strength
Is a good place to live	Strength	Strength				Weakness		Strength				
Has a distinctive identity that can't be replicated by other destinations	Weakness	Weakness	Strength			Strength						Weakness

Note: all respondents evaluated Canada plus 3 randomly selected countries from the competitive set.
 Base: Long-haul pleasure travellers (past 3 years or next 2 years), Evaluated [DESTINATION]
 C6. We are interested in your general impressions about destinations even if you have never been there. Please select all the destinations you think apply to the statement. Select "None of these" if you think none of the destinations apply.



Brand Value Statements: Among HVG Audience



	Canada	Australia	Finland	France	Germany	Iceland	Italy	New Zealand	Spain	Switzerland	United Kingdom	United States
n=	189	59	62	49*	41*	51	63	39*	49*	53	57	44*
Is a place with wide-open landscapes	Strength		Strength	Weakness	Weakness	Strength	Weakness	Strength	Weakness	Strength	Weakness	
Is a place where nature can be enjoyed in close proximity to cities	Strength			Weakness			Weakness	Strength	Weakness	Strength		
Is a place that embraces cultural diversity				Strength		Weakness	Weakness			Weakness		Strength
Is a place where the people are welcoming		Strength		Weakness		Weakness		Strength			Weakness	
Is a place where the people are open-minded		Strength	Weakness					Strength	Strength	Weakness	Weakness	Strength
Is a place where the people embrace new ideas									Weakness	Weakness		Strength
Is a good place to live	Strength	Strength	Weakness			Weakness						
Has a distinctive identity that can't be replicated by other destinations	Weakness	Weakness	Strength		Weakness	Strength			Strength			Weakness

Note: all respondents evaluated Canada plus 3 randomly selected countries from the competitive set.
 Base: Long-haul pleasure travellers (past 3 years or next 2 years), HVG Audience, Evaluated [DESTINATION]

C6. We are interested in your general impressions about destinations even if you have never been there. Please select all the destinations you think apply to the statement.
 Select "None of these" if you think none of the destinations apply.

*Small base size, interpret with caution (n<50)



Destination Attributes: Drivers Analysis: Among Total Japan

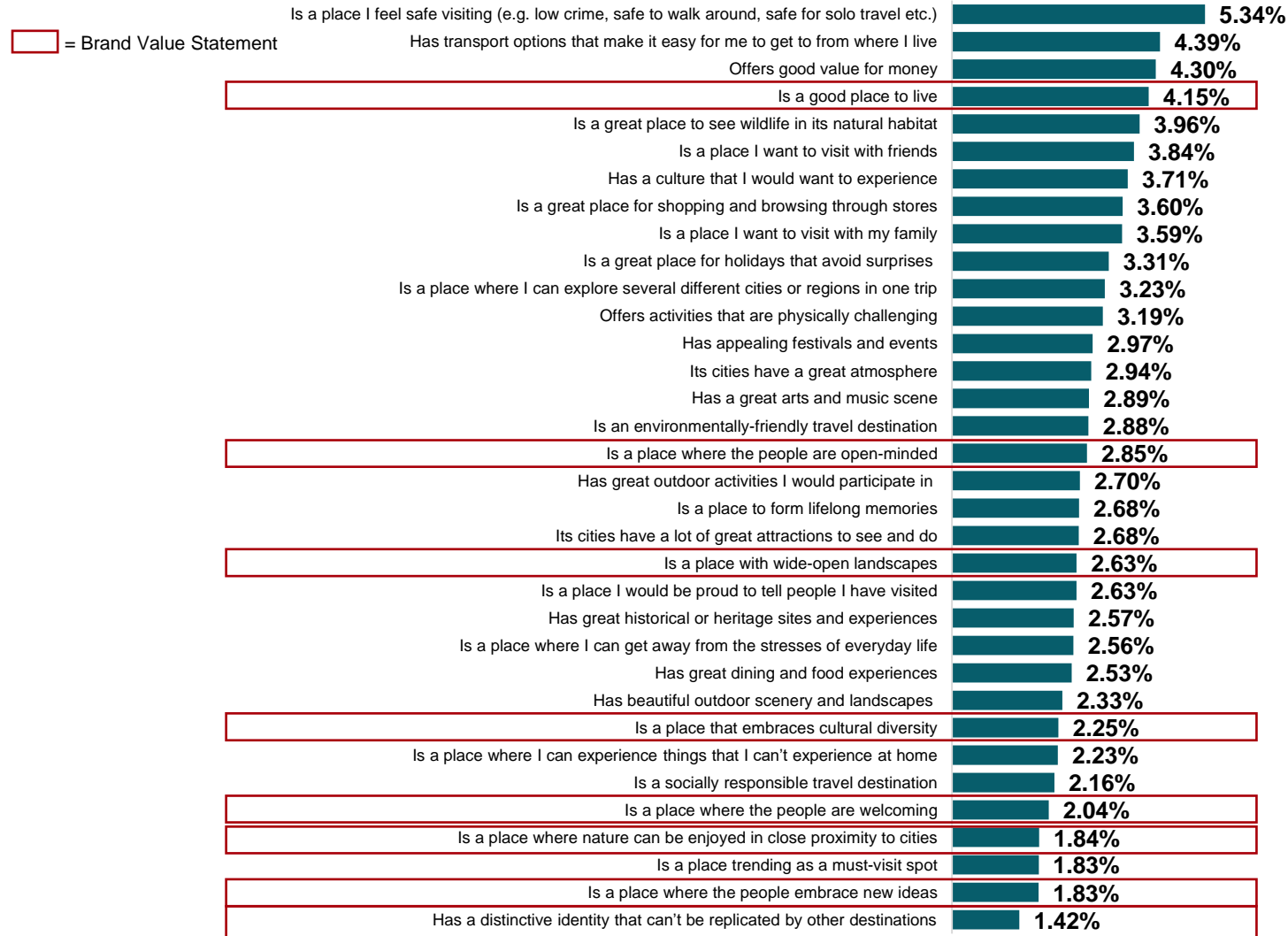


Description

Key drivers analysis (KDA) seeks to identify the strongest predictors of a dependent variable. In this case, we used consideration of a destination (C2) as the dependent variable. The analysis uses a mix of linear and logistic regressions, assessing the simultaneous effect of many independent variables, destination attributes (C6) while controlling for each other.

Interpretation

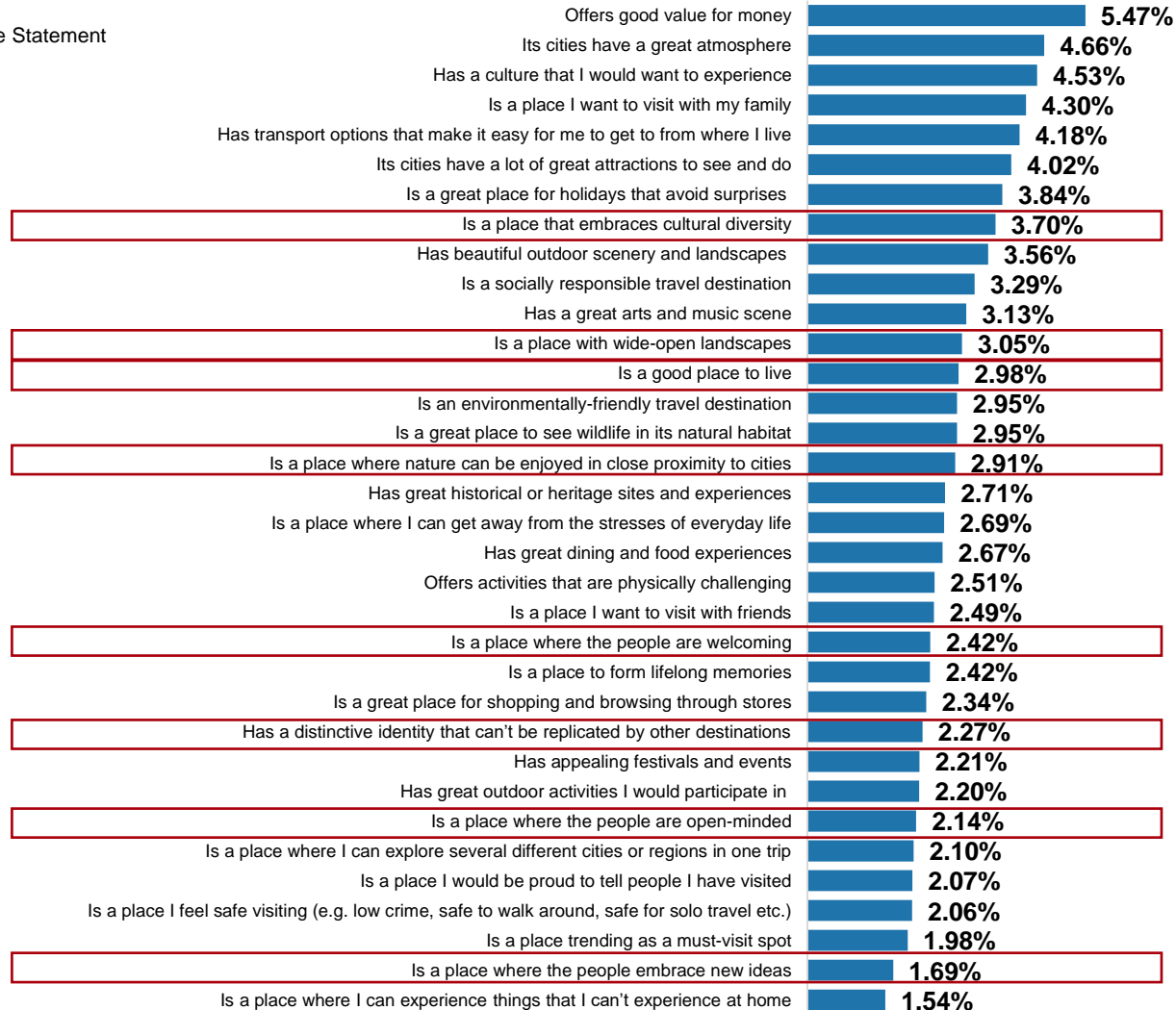
Attributes with a high percentage level are more likely to impact consideration of a destination. This generally means that destinations that score highly on the top attributes may have higher consideration levels. Each percentage does also indicate the degree of relative impact. An attribute with a score of 5% is twice as impactful on consideration as an attribute with a score of 2.5%.



Destination Attributes: Drivers Analysis: Among HVG Audience



= Brand Value Statement



Description

Key drivers analysis (KDA) seeks to identify the strongest predictors of a dependent variable. In this case, we used consideration of a destination (C2) as the dependent variable. The analysis uses a mix of linear and logistic regressions, assessing the simultaneous effect of many independent variables, destination attributes (C6) while controlling for each other.

Interpretation

Attributes with a high percentage level are more likely to impact consideration of a destination. This generally means that destinations that score highly on the top attributes may have higher consideration levels. Each percentage does also indicate the degree of relative impact. An attribute with a score of 5% is twice as impactful on consideration as an attribute with a score of 2.5%.





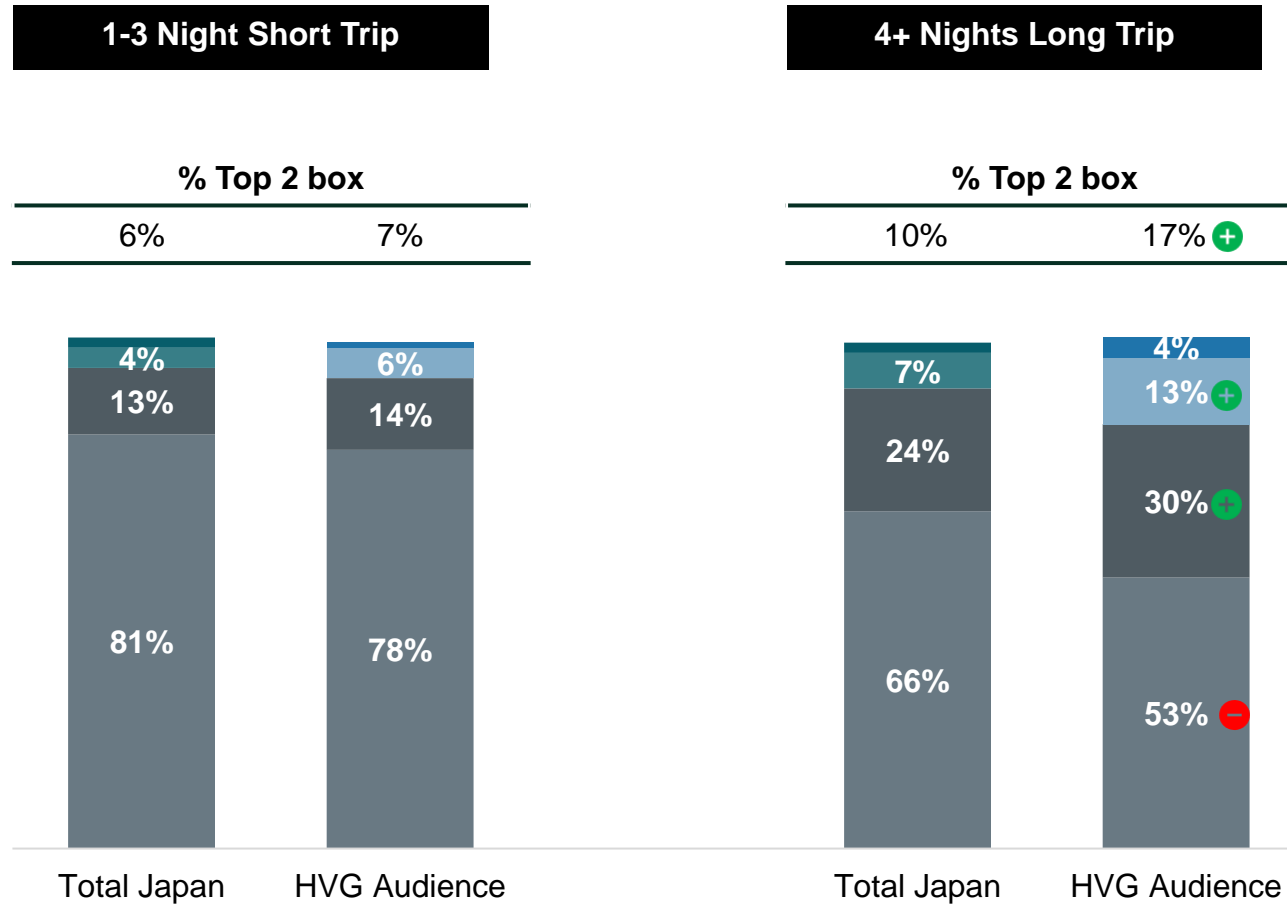
Travel Intentions to Canada



Toronto
Ontario



Likelihood to Take a Holiday Trip to Canada (Next 2 Years)



**NET: Definitely/
Very Likely to
visit Canada in
the next 2 years**

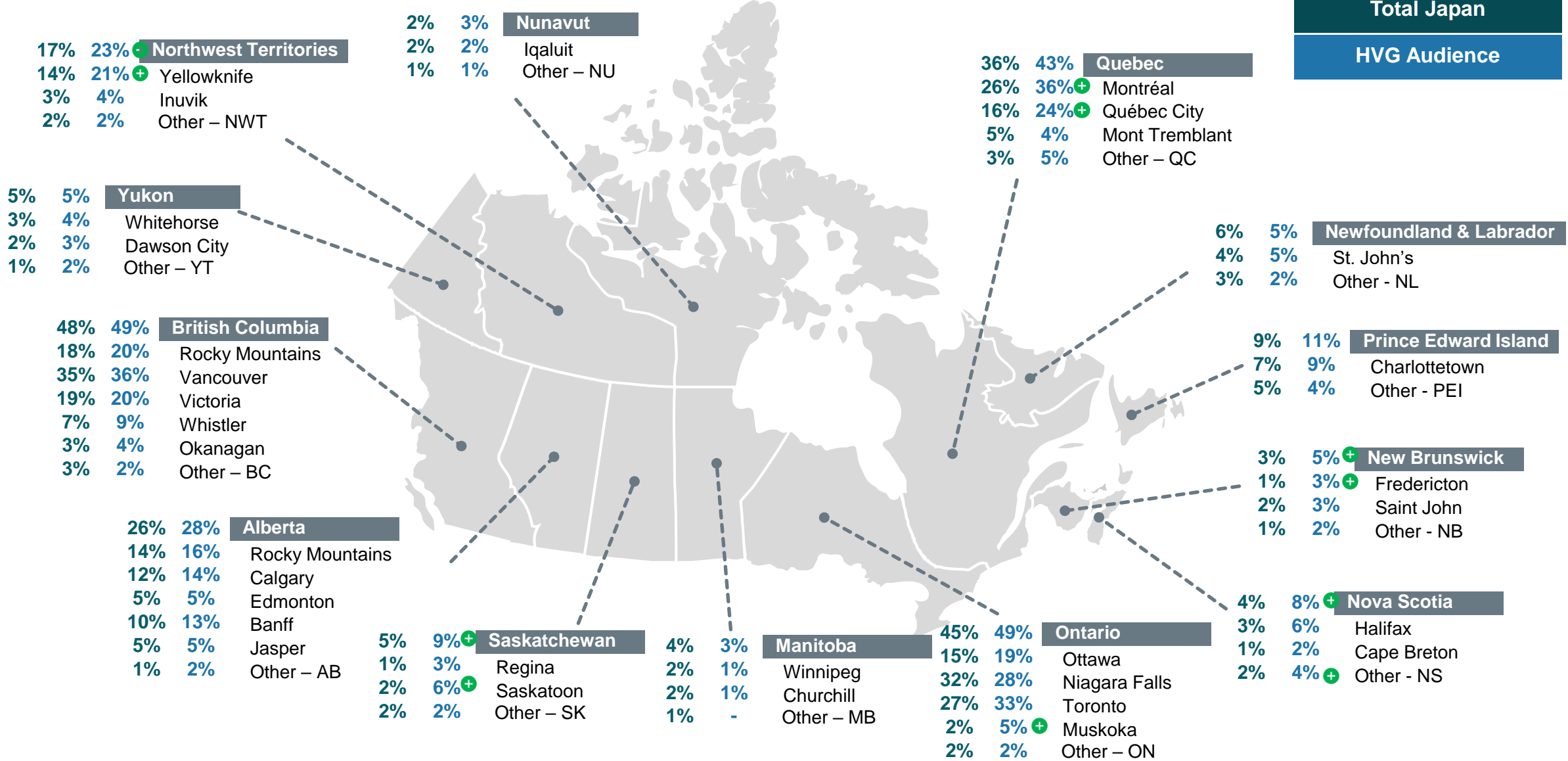
**Total: 12%
HVG: 20%+**

39 Note: "Not interested" is comprised of those saying not very likely, not at all likely, or indicating no intention to visit Canada
Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1501); HVG (n=189)
E1. Realistically, how likely are you to take a holiday trip to Canada in the next 2 years? (Select one)

Canadian Destinations Likely to Visit



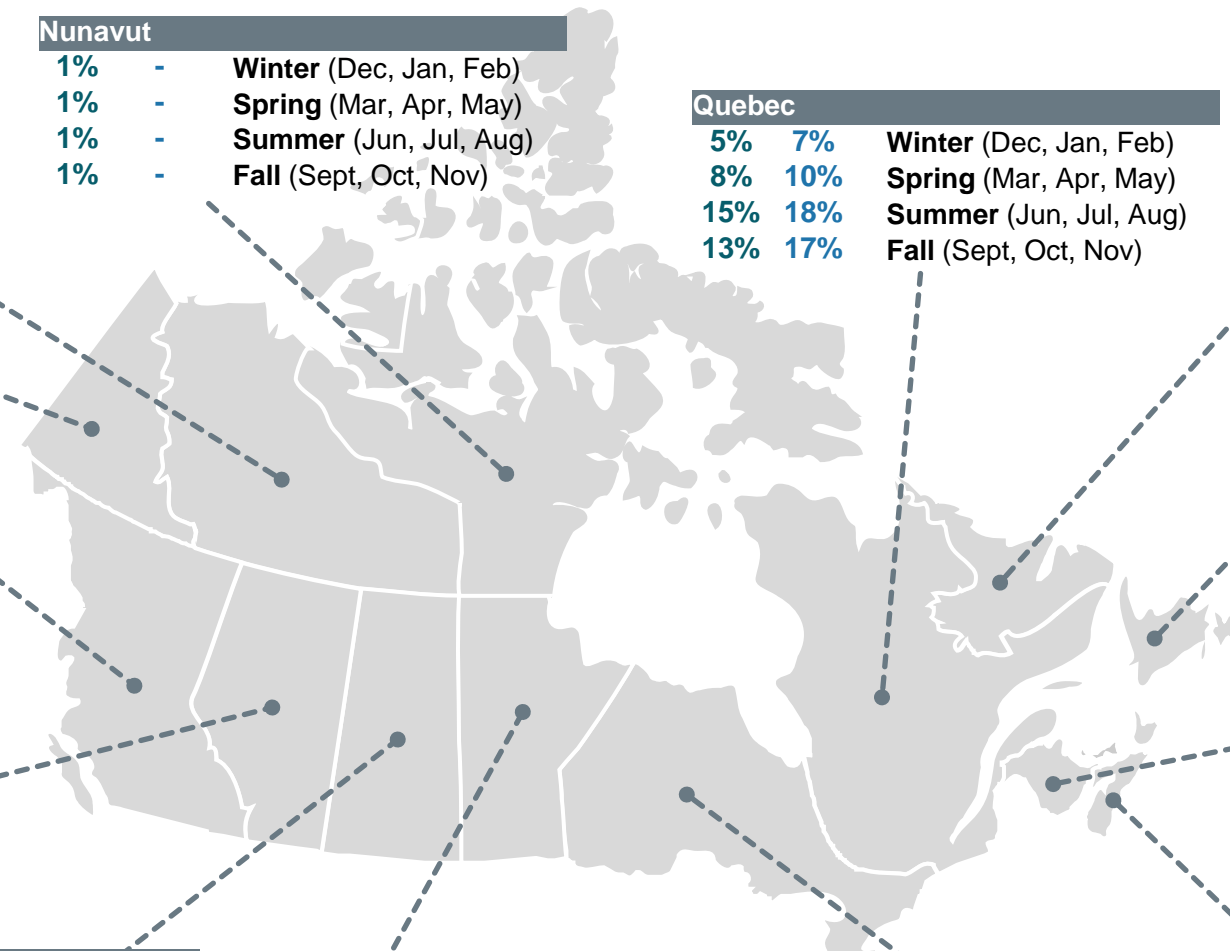
Total Japan
HVG Audience



Time of Year Interested in Visiting Canada (Next 2 Years)



Total Japan
HVG Audience



Northwest Territories

5%	6%	Winter (Dec, Jan, Feb)
4%	6%	Spring (Mar, Apr, May)
6%	10%+	Summer (Jun, Jul, Aug)
5%	9%	Fall (Sept, Oct, Nov)

Nunavut

1%	-	Winter (Dec, Jan, Feb)
1%	-	Spring (Mar, Apr, May)
1%	-	Summer (Jun, Jul, Aug)
1%	-	Fall (Sept, Oct, Nov)

Quebec

5%	7%	Winter (Dec, Jan, Feb)
8%	10%	Spring (Mar, Apr, May)
15%	18%	Summer (Jun, Jul, Aug)
13%	17%	Fall (Sept, Oct, Nov)

Newfoundland & Labrador

1%	3%+	Winter (Dec, Jan, Feb)
2%	2%	Spring (Mar, Apr, May)
3%	2%	Summer (Jun, Jul, Aug)
3%	2%	Fall (Sept, Oct, Nov)

Yukon

2%	2%	Winter (Dec, Jan, Feb)
1%	2%	Spring (Mar, Apr, May)
2%	2%	Summer (Jun, Jul, Aug)
2%	2%	Fall (Sept, Oct, Nov)

British Columbia

6%	9%	Winter (Dec, Jan, Feb)
10%	13%	Spring (Mar, Apr, May)
19%	25%	Summer (Jun, Jul, Aug)
15%	17%	Fall (Sept, Oct, Nov)

Prince Edward Island

1%	3%+	Winter (Dec, Jan, Feb)
3%	5%	Spring (Mar, Apr, May)
5%	7%	Summer (Jun, Jul, Aug)
3%	5%	Fall (Sept, Oct, Nov)

Alberta

3%	5%	Winter (Dec, Jan, Feb)
6%	9%	Spring (Mar, Apr, May)
9%	12%	Summer (Jun, Jul, Aug)
8%	9%	Fall (Sept, Oct, Nov)

New Brunswick

-	2%+	Winter (Dec, Jan, Feb)
1%	4%+	Spring (Mar, Apr, May)
2%	3%	Summer (Jun, Jul, Aug)
1%	3%+	Fall (Sept, Oct, Nov)

Saskatchewan

1%	3%+	Winter (Dec, Jan, Feb)
2%	5%	Spring (Mar, Apr, May)
3%	4%	Summer (Jun, Jul, Aug)
1%	3%	Fall (Sept, Oct, Nov)

Manitoba

1%	1%	Winter (Dec, Jan, Feb)
2%	1%	Spring (Mar, Apr, May)
2%	-	Summer (Jun, Jul, Aug)
2%	-	Fall (Sept, Oct, Nov)

Ontario

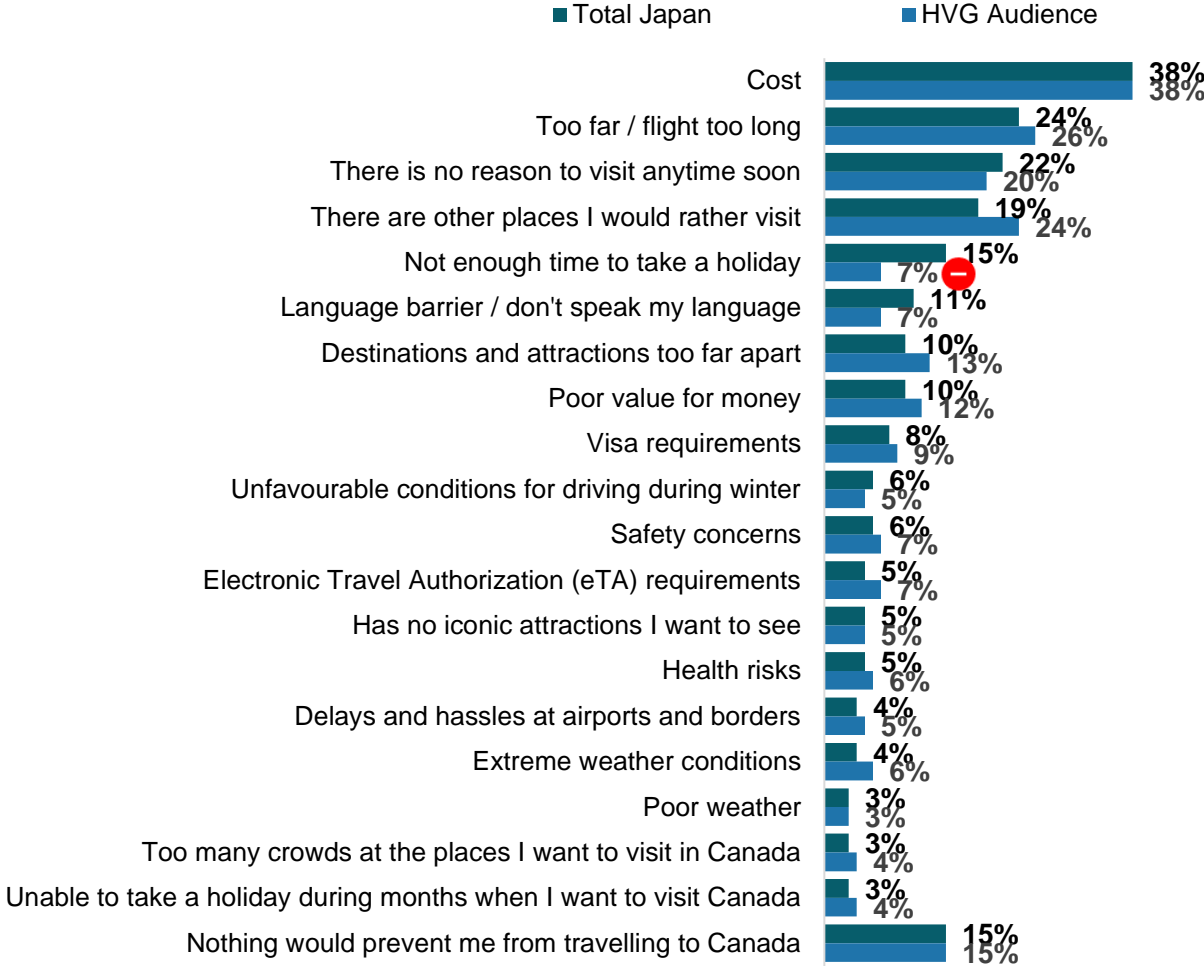
4%	6%	Winter (Dec, Jan, Feb)
8%	9%	Spring (Mar, Apr, May)
16%	21%	Summer (Jun, Jul, Aug)
14%	21%+	Fall (Sept, Oct, Nov)

Nova Scotia

1%	2%	Winter (Dec, Jan, Feb)
1%	4%+	Spring (Mar, Apr, May)
2%	2%	Summer (Jun, Jul, Aug)
2%	4%	Fall (Sept, Oct, Nov)



Barriers for Visiting Canada





Travel Behaviours



 Churchill
Manitoba

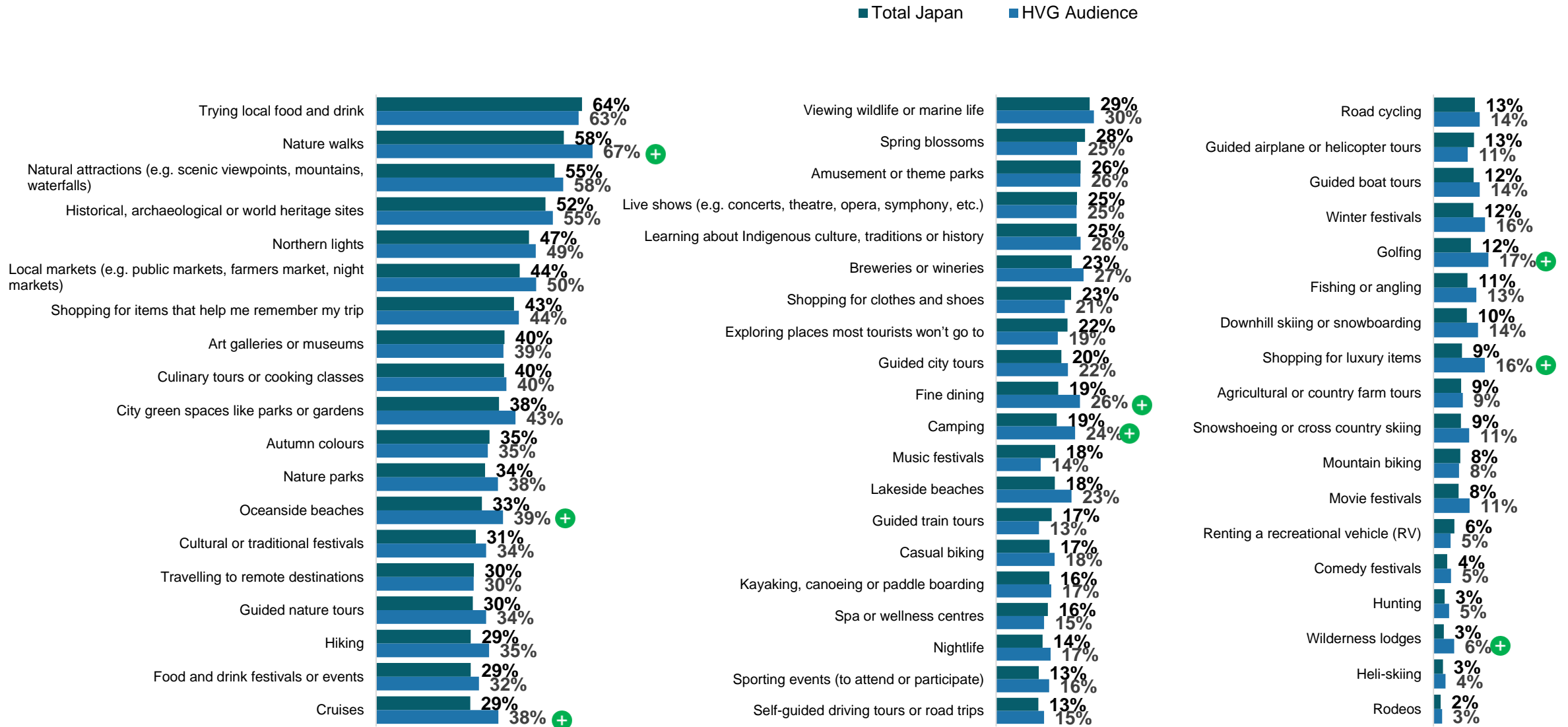


Top 10 Activities Interested In & Trip Anchors

Top 10 General Activities Interested In	
Total Japan (n=1501)	HVG Audience (n=189)
Trying local food and drink	Nature walks +
Nature walks	Trying local food and drink
Natural attractions (e.g. scenic viewpoints, mountains, waterfalls)	Natural attractions (e.g. scenic viewpoints, mountains, waterfalls)
Historical, archaeological or world heritage sites	Historical, archaeological or world heritage sites
Northern lights	Local markets (e.g. public markets, farmers market, night markets)
Local markets (e.g. public markets, farmers market, night markets)	Northern lights
Shopping for items that help me remember my trip	Shopping for items that help me remember my trip
Art galleries or museums	City green spaces like parks or gardens
Culinary tours or cooking classes	Culinary tours or cooking classes
City green spaces like parks or gardens	Art galleries or museums

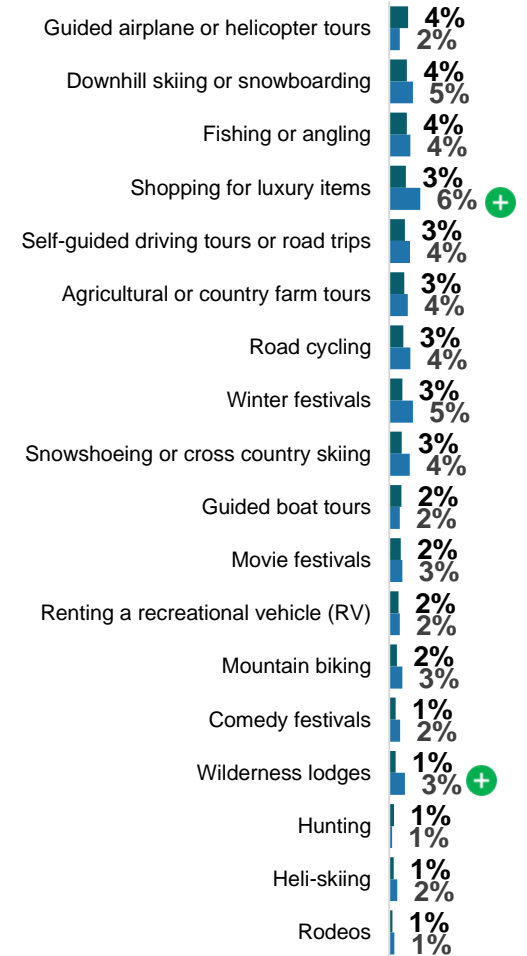
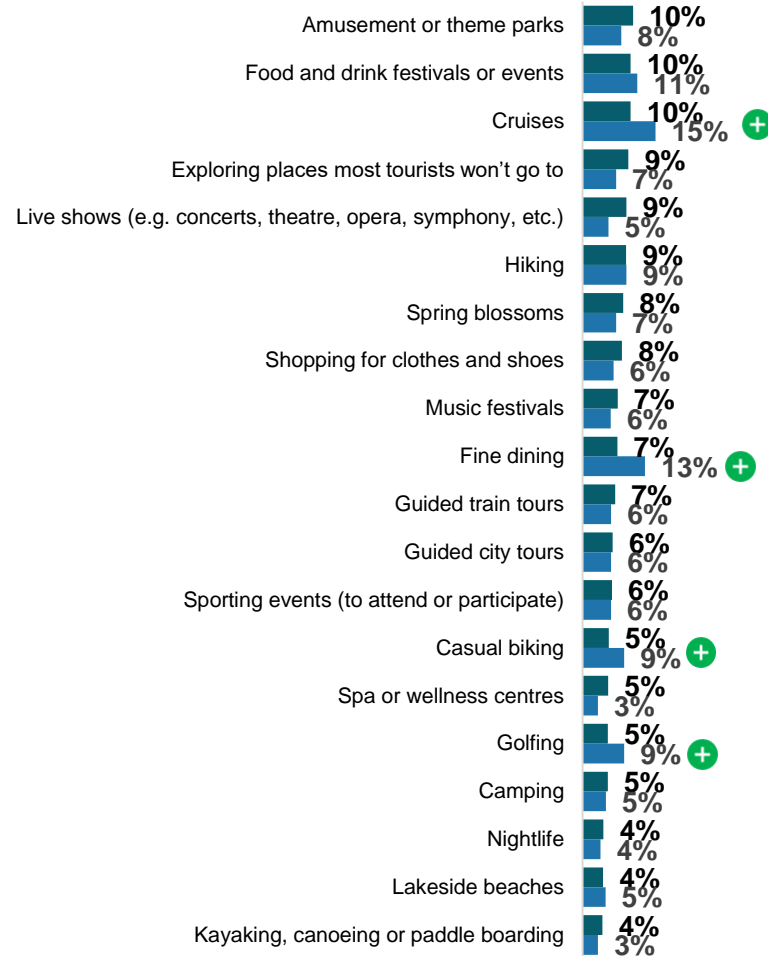
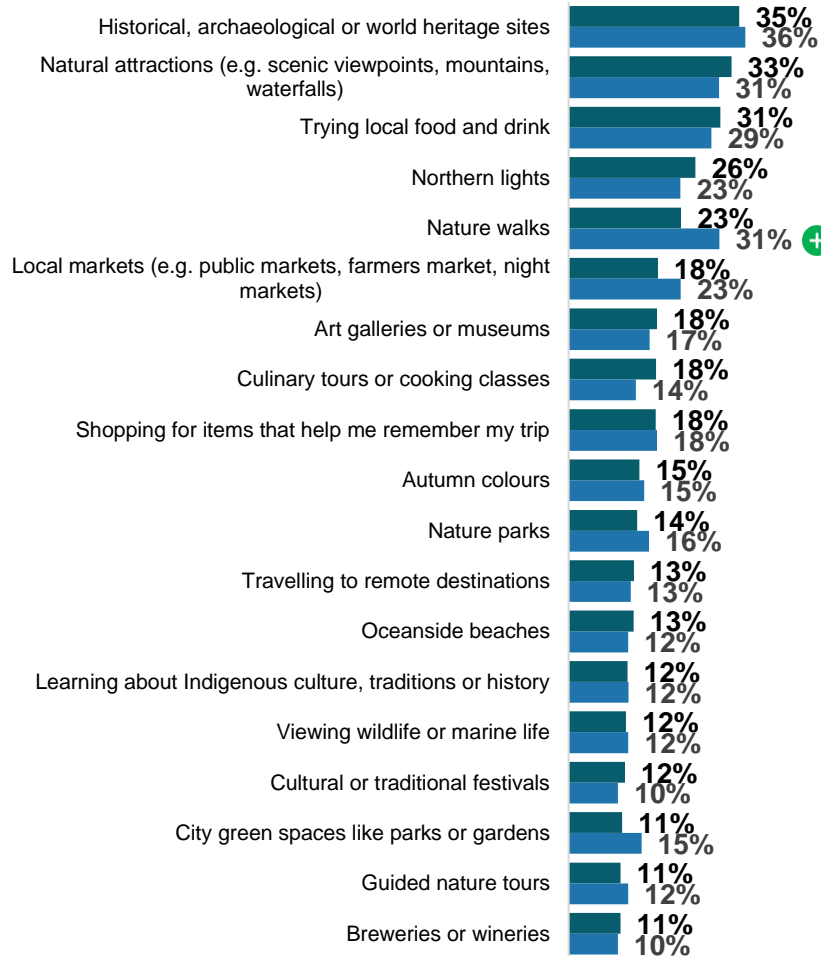
Top 10 Trip Anchor Activities	
Total Japan (n=1472)	HVG Audience (n=189)
Historical, archaeological or world heritage sites	Historical, archaeological or world heritage sites
Natural attractions (e.g. scenic viewpoints, mountains, waterfalls)	Nature walks +
Trying local food and drink	Natural attractions (e.g. scenic viewpoints, mountains, waterfalls)
Northern lights	Trying local food and drink
Nature walks	Local markets (e.g. public markets, farmers market, night markets)
Local markets (e.g. public markets, farmers market, night markets)	Northern lights
Art galleries or museums	Shopping for items that help me remember my trip
Culinary tours or cooking classes	Art galleries or museums
Shopping for items that help me remember my trip	Nature parks
Autumn colours	Autumn colours

General Activities Interested In

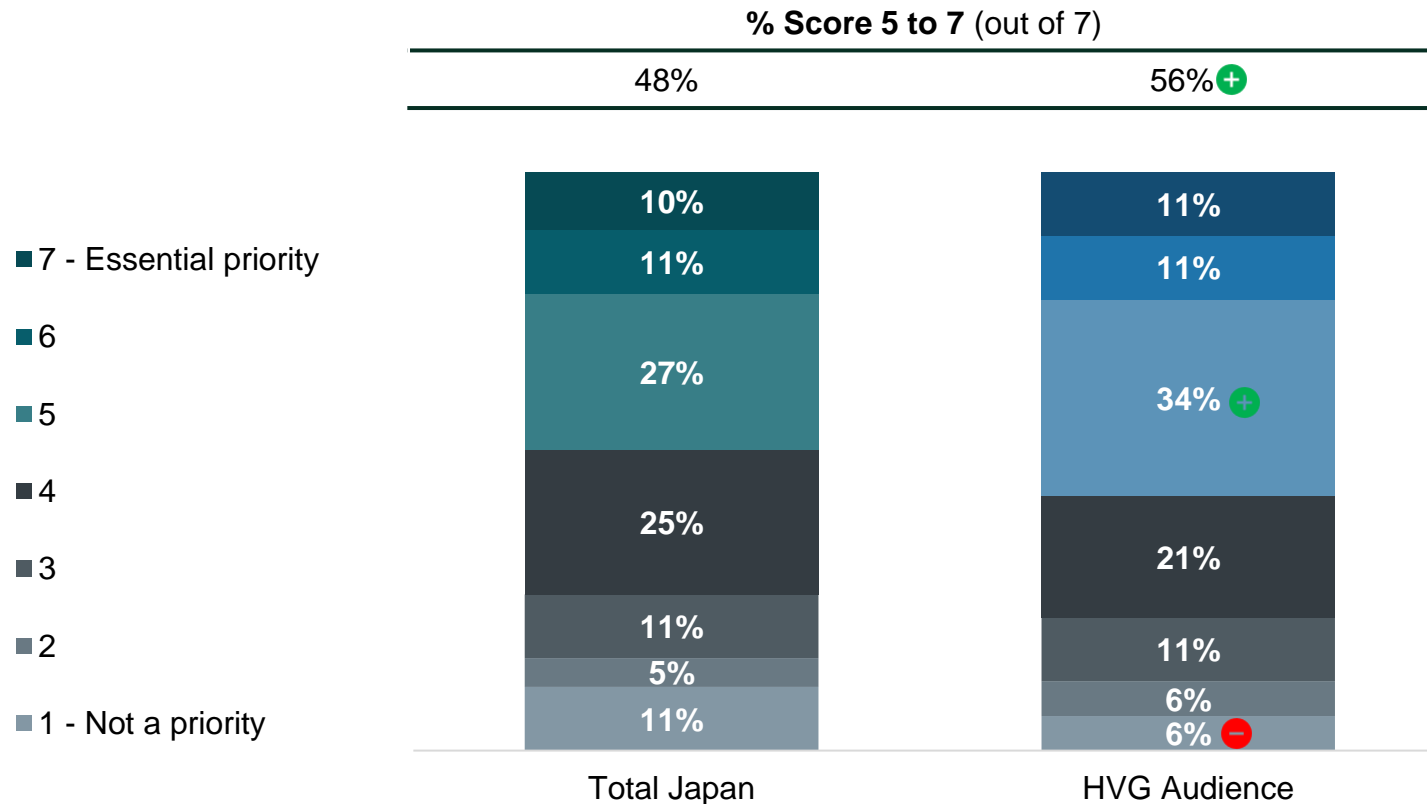


Trip Anchor Activities

■ Total Japan ■ HVG Audience



Priority of Sustainable Travel When Planning a Trip



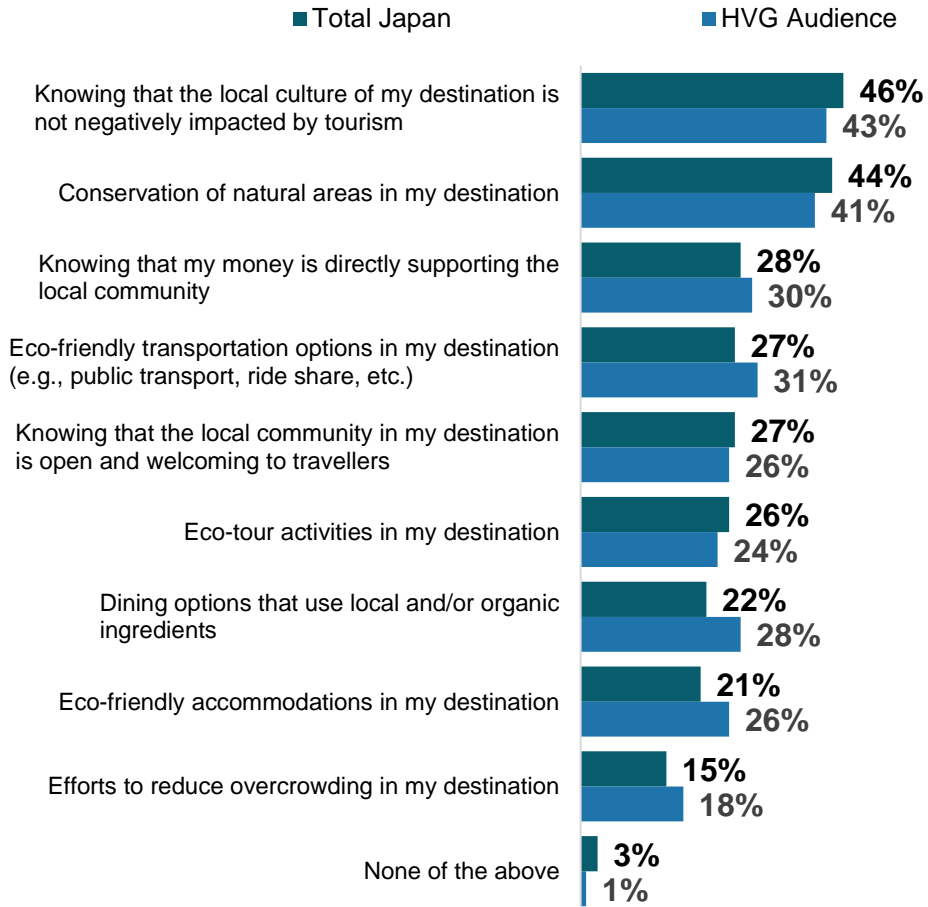
Sustainable Travel Description

Sustainable travel refers to “travel that minimizes any negative impacts on the destination’s environment, economy and society, while making positive contributions to the local people and conserving the destination’s natural and cultural heritage”.

47 Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1501); HVG (n=189)
 D7. [DESCRIPTION] How much of a priority is sustainable travel to you when you are planning a trip? Please use a 7-point scale, where 7 means ‘essential priority’ and 1 means ‘not a priority’.



Top 3 Most Important Sustainability Efforts

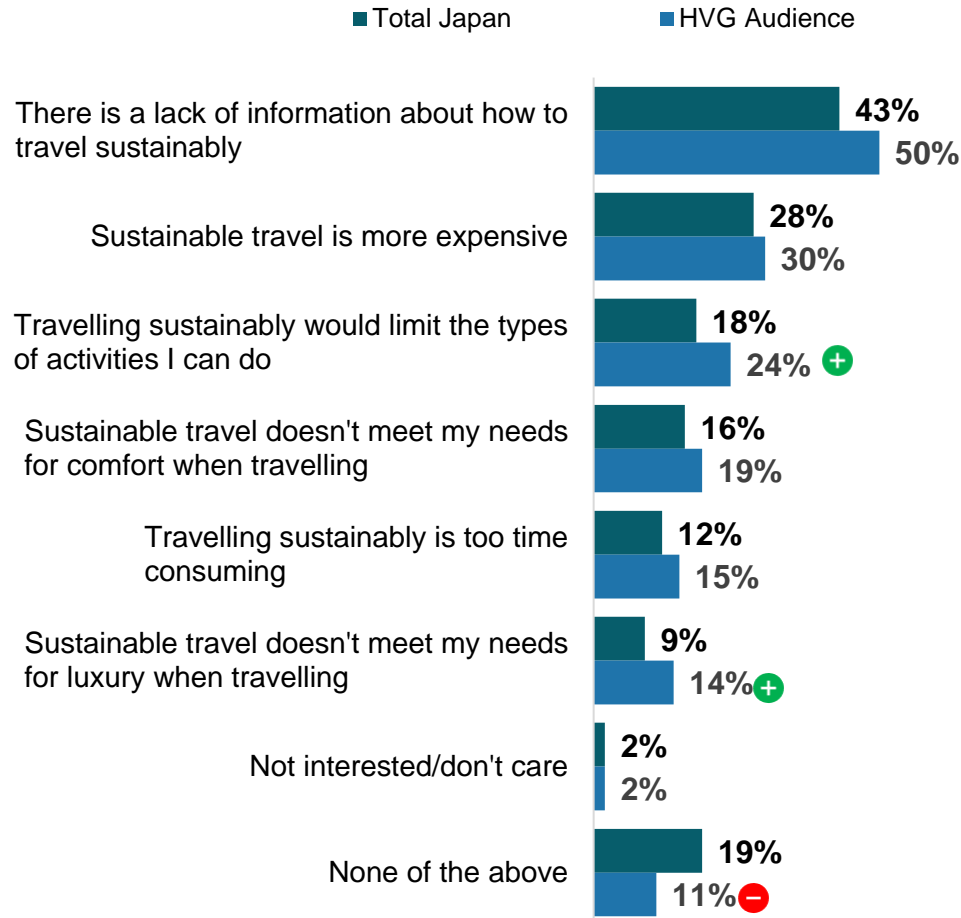


Sustainable Travel Description

Sustainable travel refers to “travel that minimizes any negative impacts on the destination’s environment, economy and society, while making positive contributions to the local people and conserving the destination’s natural and cultural heritage”.



Barriers to Sustainable Travel

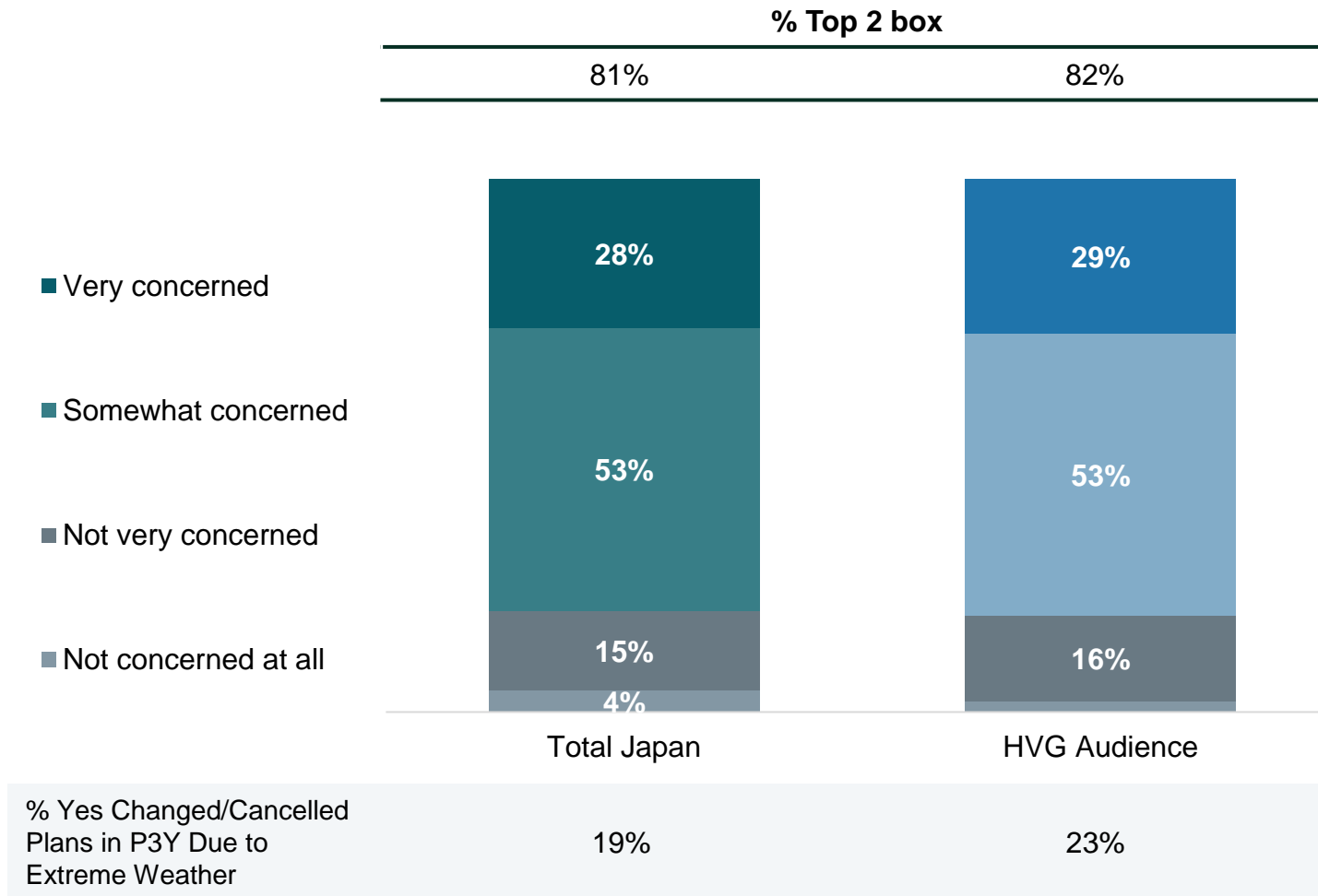


Sustainable Travel Description

Sustainable travel refers to “travel that minimizes any negative impacts on the destination’s environment, economy and society, while making positive contributions to the local people and conserving the destination’s natural and cultural heritage”.



Impact of Extreme Weather Events on Travel Plans

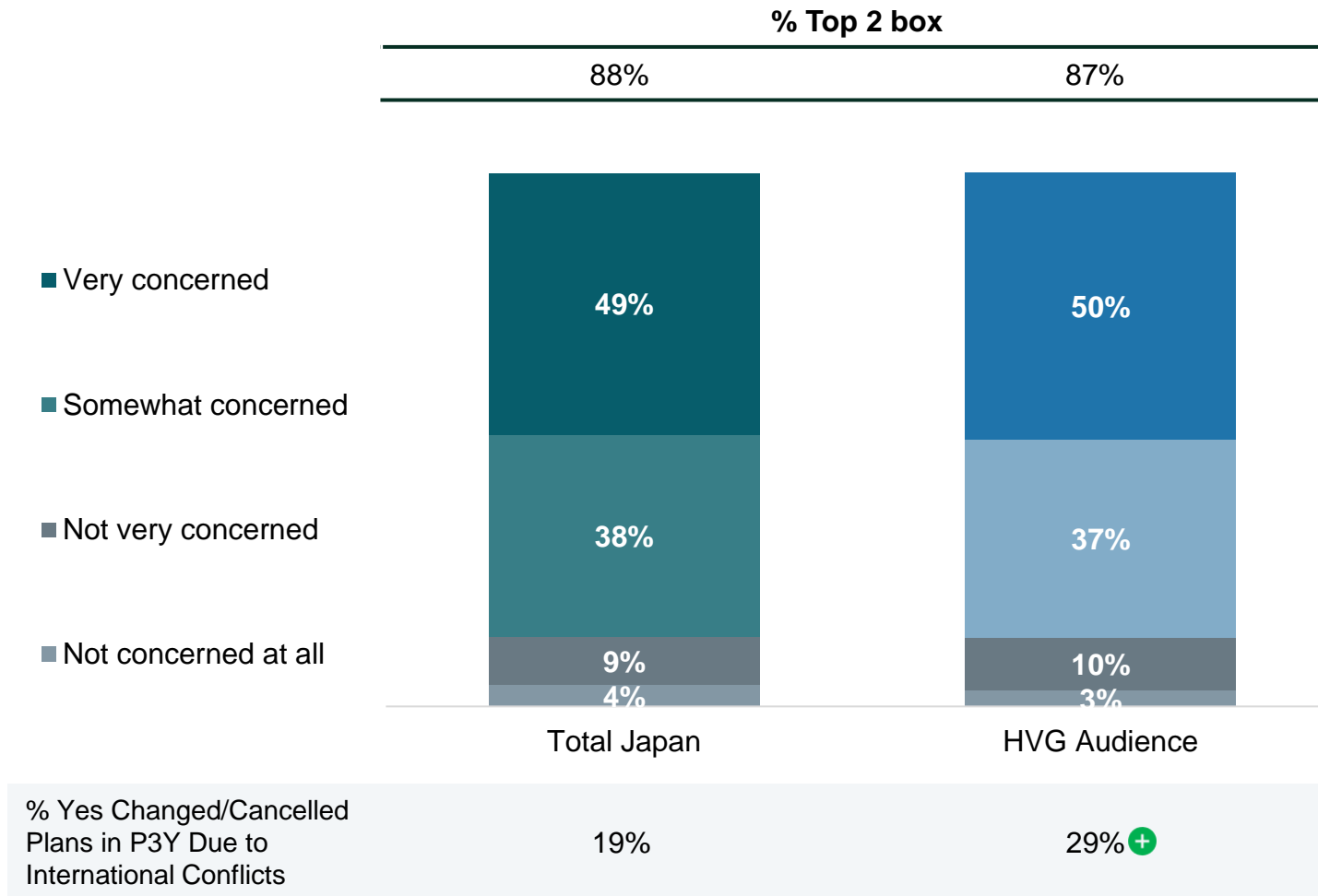


Extreme Weather Events Description

As you may or may not be aware, extreme weather events are occurrences of unusually severe weather or climate conditions. They are often short-lived and include blizzards, heat waves, wildfires, tornadoes, hurricanes or tropical cyclones.

50 Note: respondents were asked either about extreme weather events (D10/D11) or international conflicts & unrest (D12/D13)
 Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=746); HVG (n=97)
 D10. [DESCRIPTION] How concerned are you about extreme weather events affecting your travel plans?
 D11. In the past 3 years, have you ever had to change plans or cancel a trip due to extreme weather events?

Impact of International Conflicts & Unrest on Travel Plans

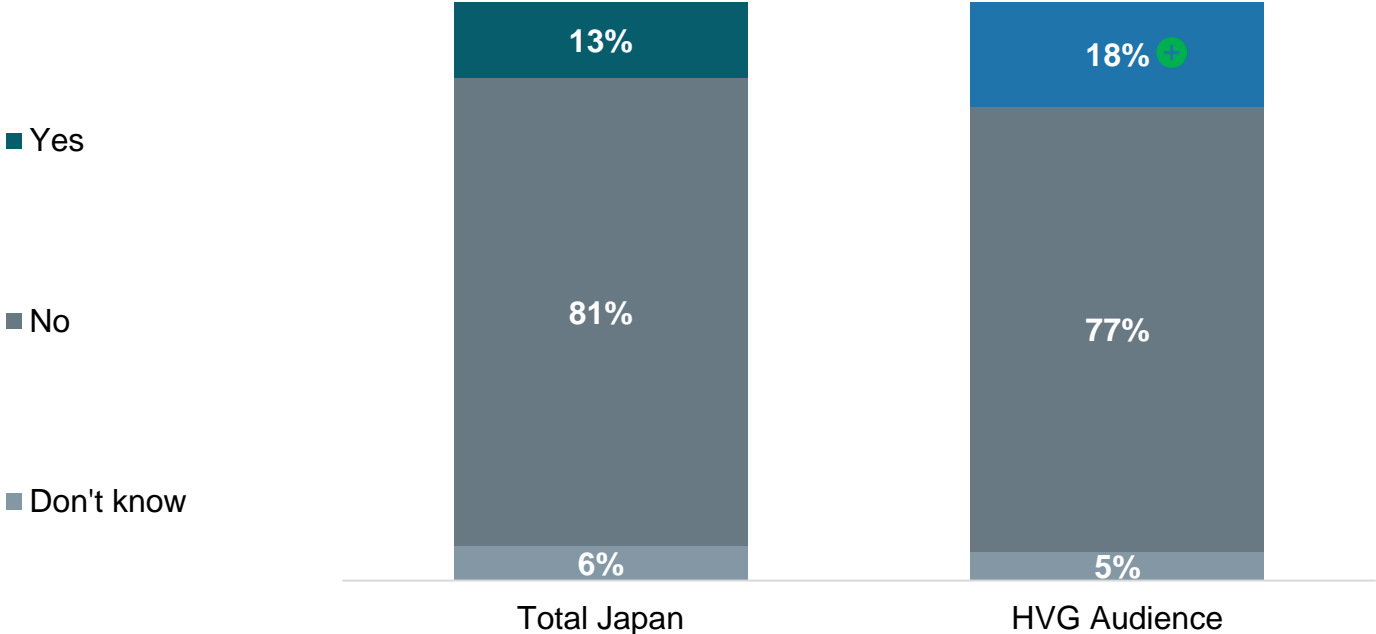


International Conflicts Description

As you may or may not be aware, international conflicts and unrest are currently occurring in different regions around the world.



Usage of AI Tools to Plan Trips





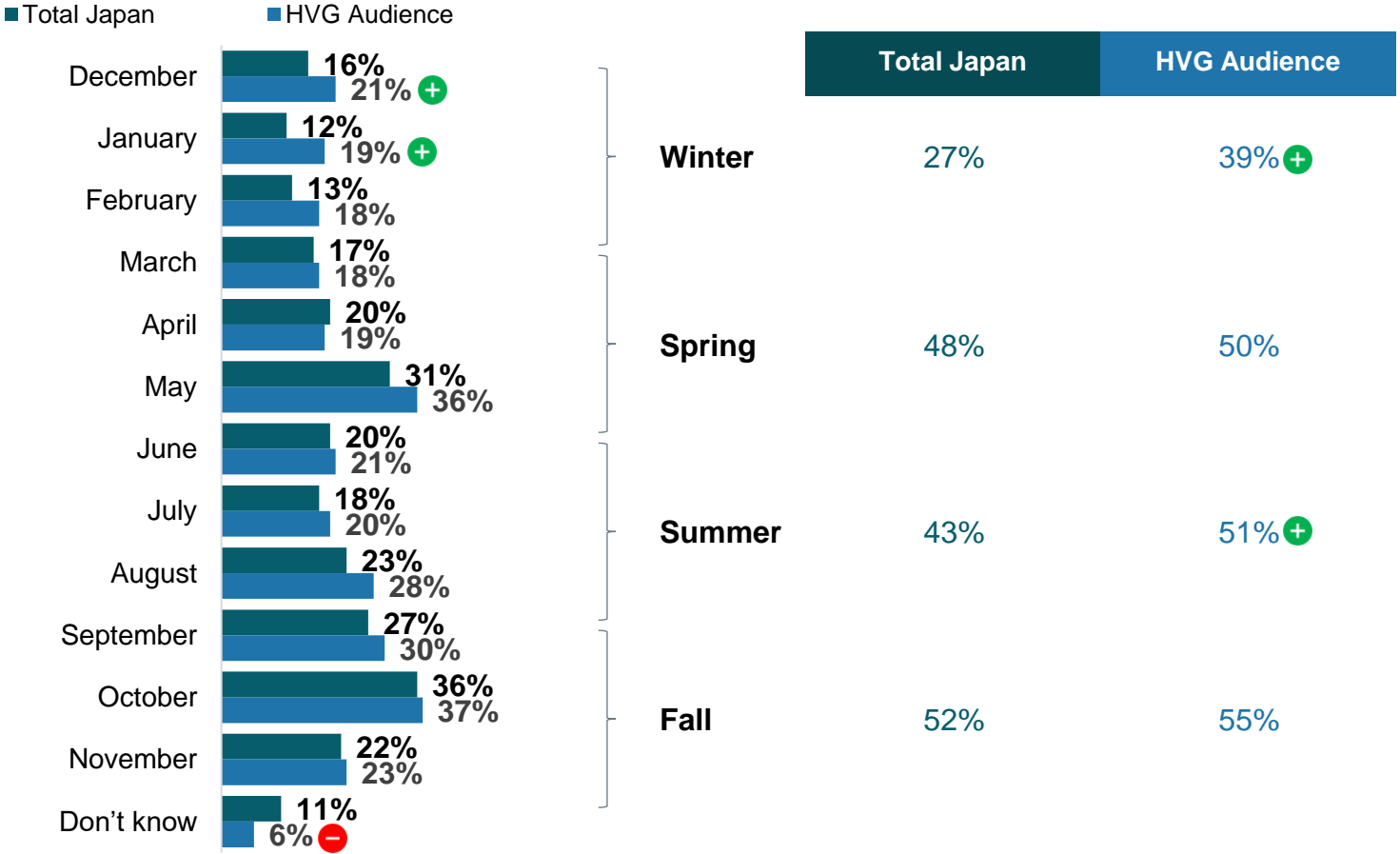
Seasonal Travel



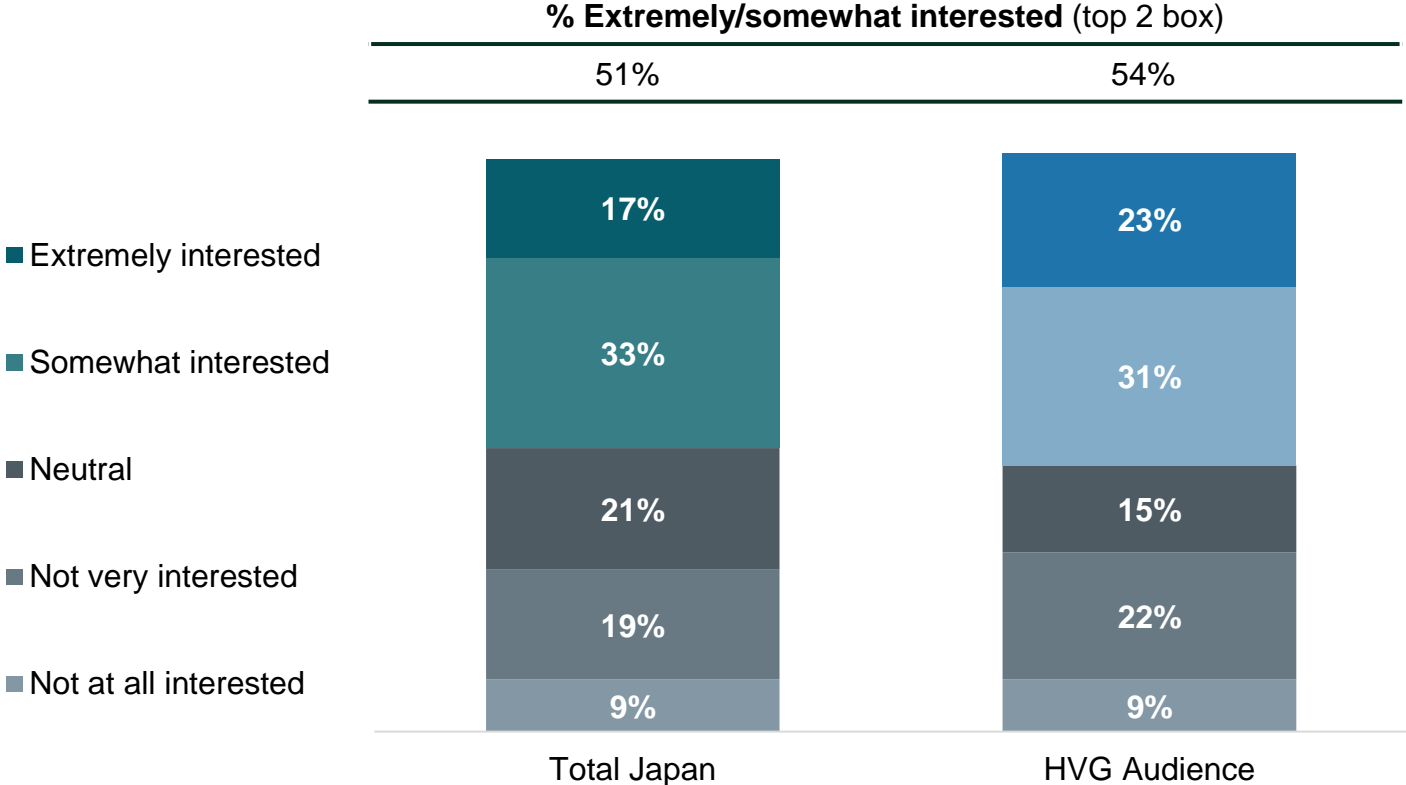
Yellowknife
Northwest Territories



Preferred Time of Year for Holiday Trips



Interest in Winter Holidays

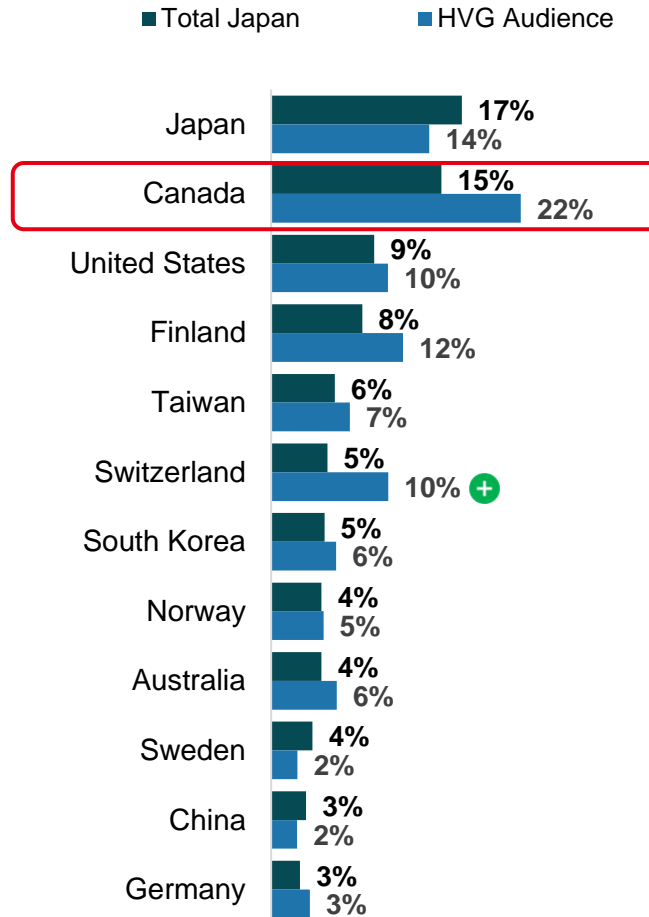


Winter Season Description

Winter is a season that is typically characterized by colder temperatures. During the winter months there are usually festivals, snow sports and holiday activities. It may snow in some destinations, allowing for skiing, snowboarding, outdoor spas and other winter activities.

55 Note: respondents were asked either about winter travel (B2/D2) or autumn/fall travel (B3/D3)
 Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=752); HVG (n=88)
 D2. In general, how interested are you in taking a holiday trip to a destination during its winter season?

Unaided Winter Destinations



Winter Season Description

Winter is a season that is typically characterized by colder temperatures. During the winter months there are usually festivals, snow sports and holiday activities. It may snow in some destinations, allowing for skiing, snowboarding, outdoor spas and other winter activities.

Note: respondents were asked either about winter travel (B2/D2) or autumn/fall travel (B3/D3)

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=752); HVG (n=88)

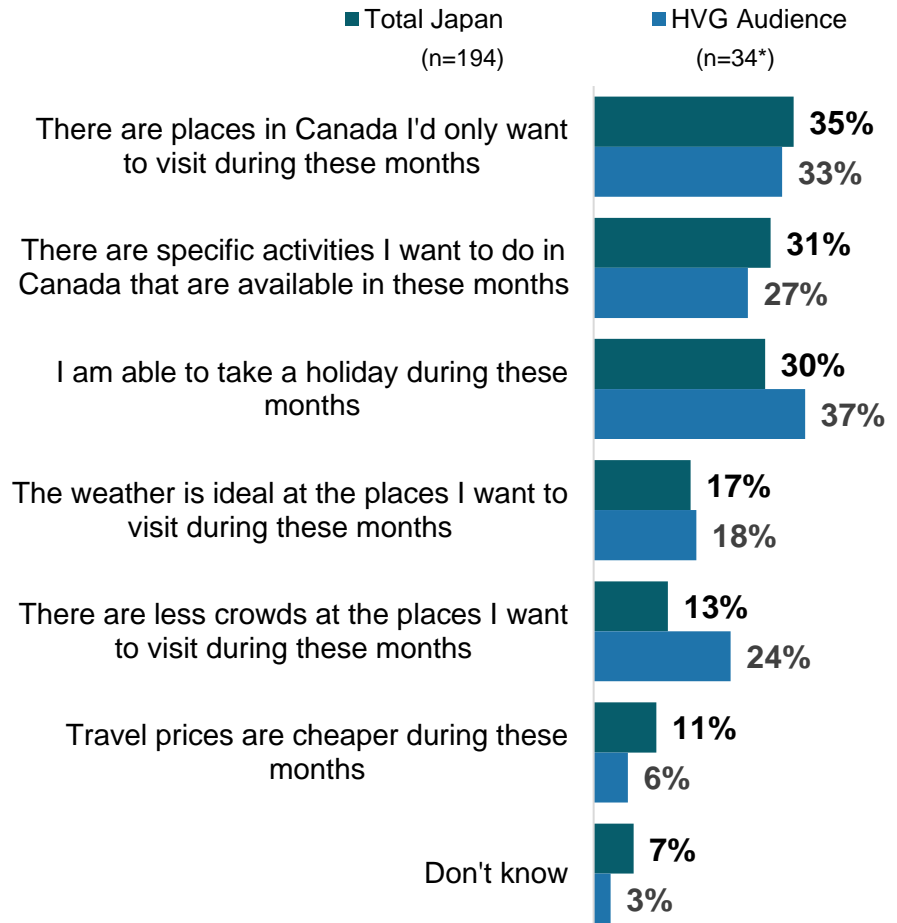
B2. What destinations come to mind when thinking about travel to experience the **winter season**? (Please list up to 3 destinations. You can mention destinations within or outside of East Asia (e.g., China, Hong Kong, Macau, Japan, South Korea and Taiwan).) [DESCRIPTION] Please note: You do not have to limit your responses to destinations you are considering for a holiday trip.



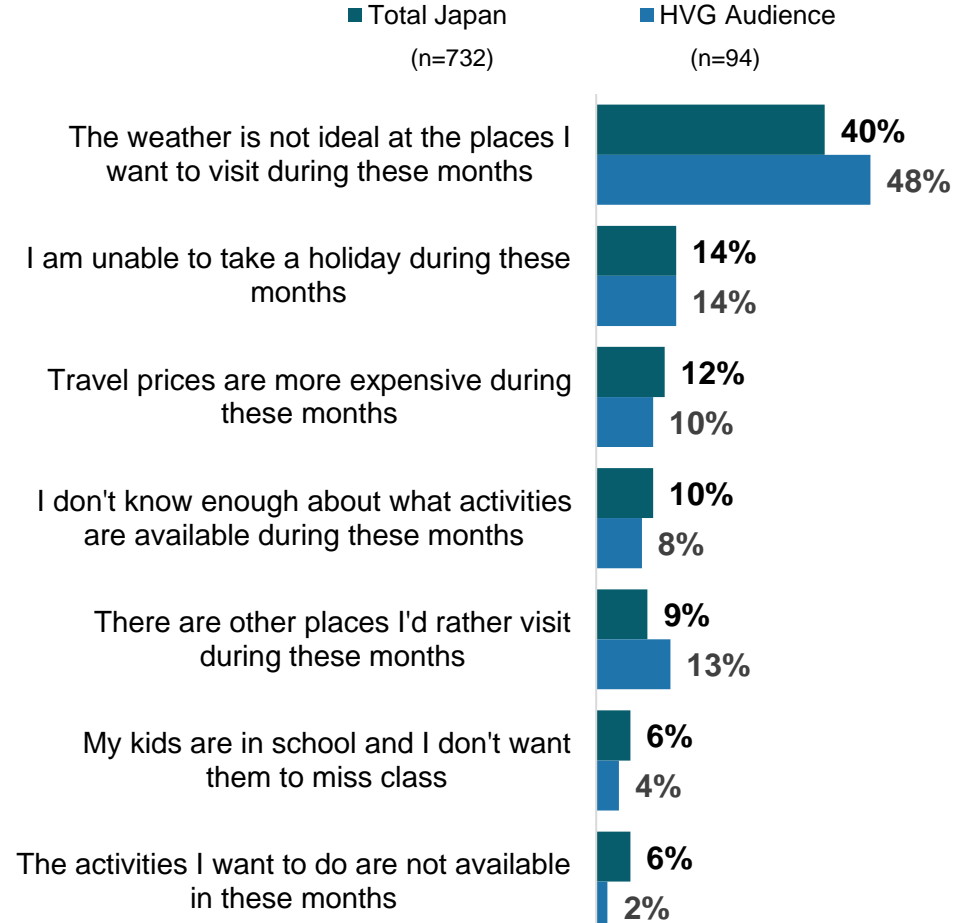
Motivators & Barriers for Winter Travel to Canada



Motivators for Winter Travel



Barriers for Winter Travel



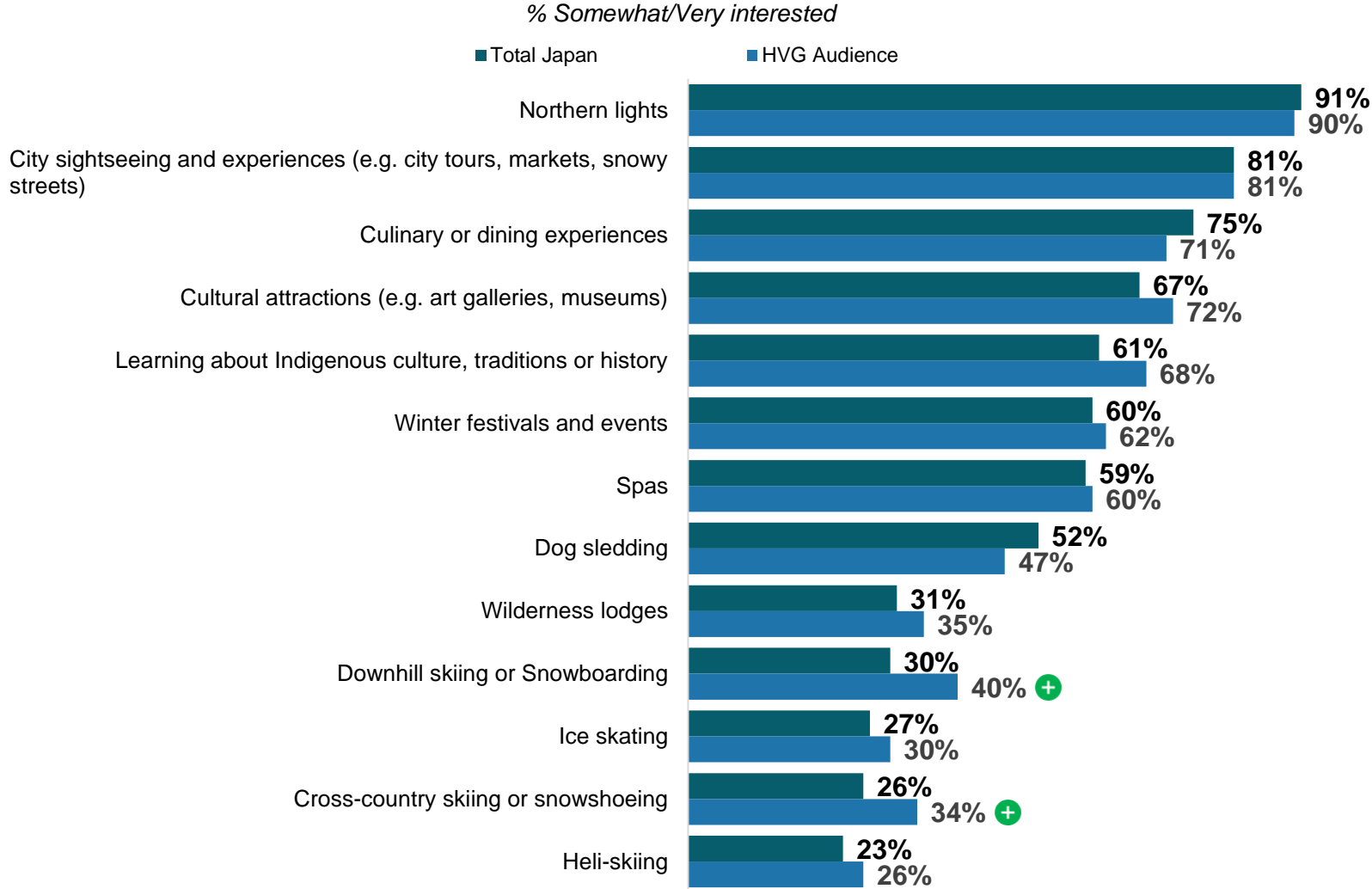
Base: Those in the dream to purchase stages of the path to purchase for Canada and considering visiting Canada or any province/territory in December, January or February E8a. You indicated earlier that you are considering taking a holiday to **Canada** during the months of December, January and/or February... Which of the following describes why you would be interested in travelling to Canada for a holiday during these **winter months**?

Base: Those in the dream to purchase stages of the path to purchase for Canada and not considering visiting Canada or any province/territory in December, January or February E9. You indicated earlier that you are not considering taking a holiday to **Canada** during the months of December, January and/or February... Which of the following describes why you would **not** be interested in travelling to Canada for a holiday during these **winter months**?

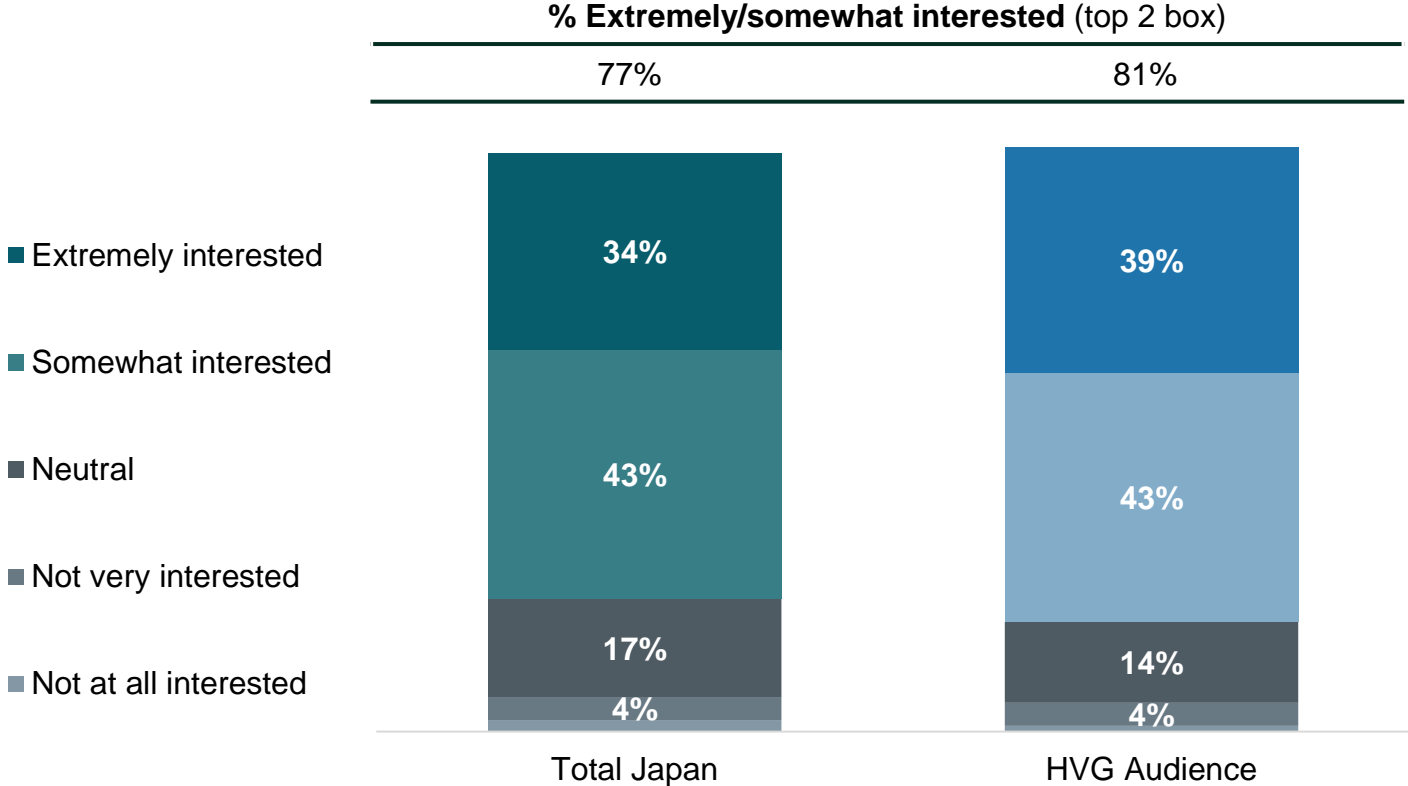
*Small base size, interpret with caution (n<50)



Interest in Winter Activities in Canada



Interest in Fall Holidays

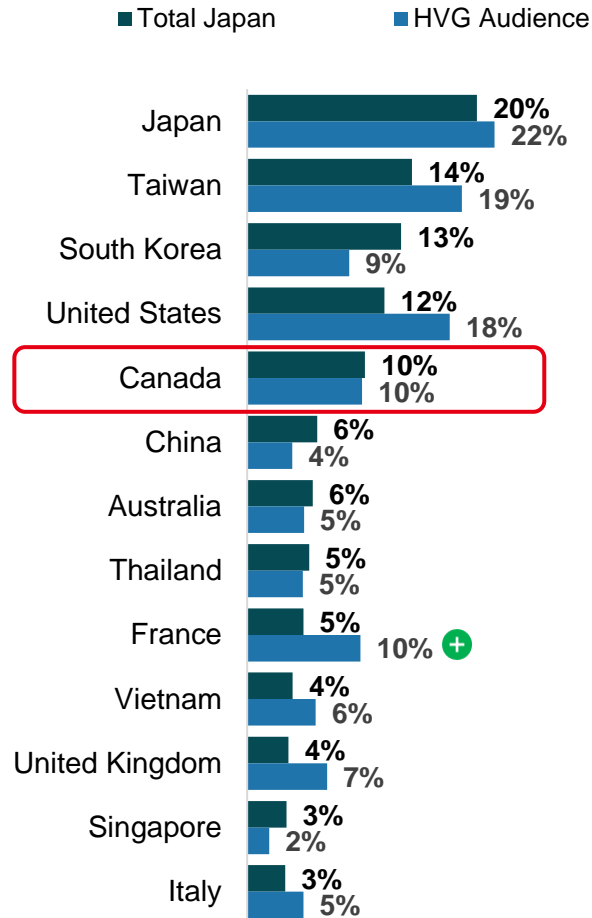


Autumn Season Description

Autumn is the season between summer and winter. Autumn tends to be a slower season after the busy summer in most destinations. In some destinations, the weather becomes cooler and the leaves on trees shift to red, orange and yellow in preparation to shed. While autumn has some distinct activities and experiences, many summer activities can still be done in autumn.

59 Note: respondents were asked either about winter travel (B2/D2) or autumn/fall travel (B3/D3)
 Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=749); HVG (n=101)
 D3. In general, how interested are you in taking a holiday trip to a destination during its autumn season?

Unaided Fall Destinations



Autumn Season Description

Autumn is the season between summer and winter. Autumn tends to be a slower season after the busy summer in most destinations. In some destinations, the weather becomes cooler and the leaves on trees shift to red, orange and yellow in preparation to shed. While autumn has some distinct activities and experiences, many summer activities can still be done in autumn.

Note: respondents were asked either about winter travel (B2/D2) or autumn/fall travel (B3/D3)
 Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=749); HVG (n=101)

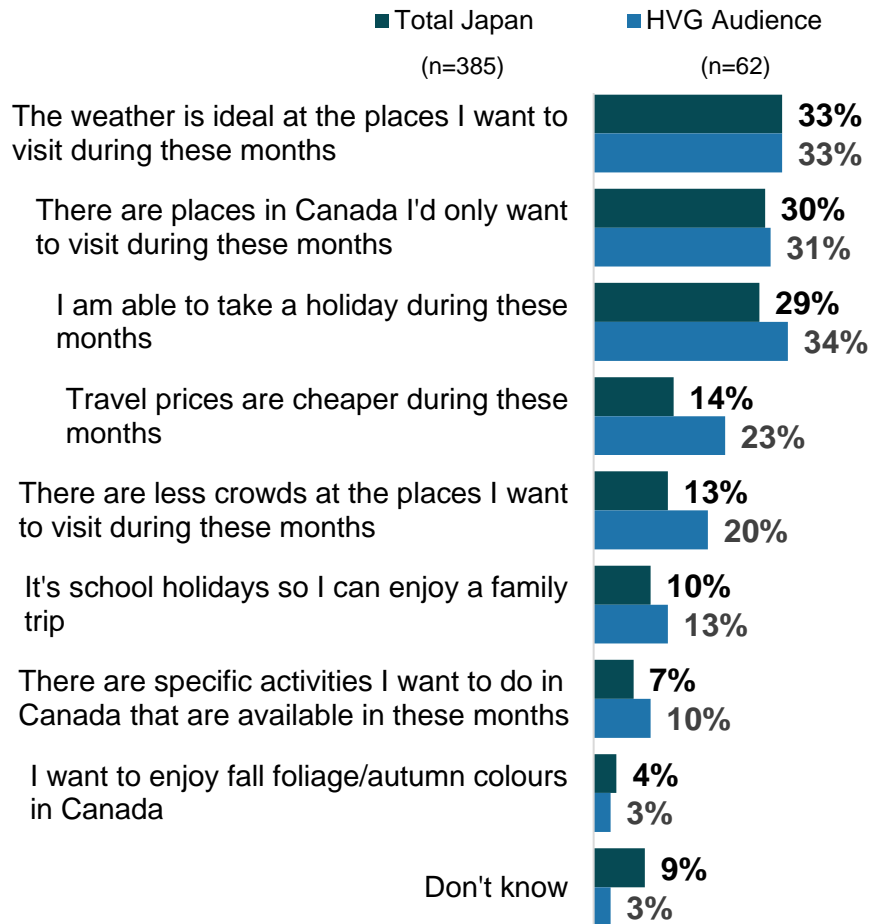
B3. What destinations come to mind when thinking about travel to experience the **autumn season**? (Please list up to 3 destinations. You can mention destinations within or outside of East Asia (e.g., China, Hong Kong, Macau, Japan, South Korea and Taiwan).) [DESCRIPTION] Please note: You do not have to limit your responses to destinations you are considering for a holiday trip.



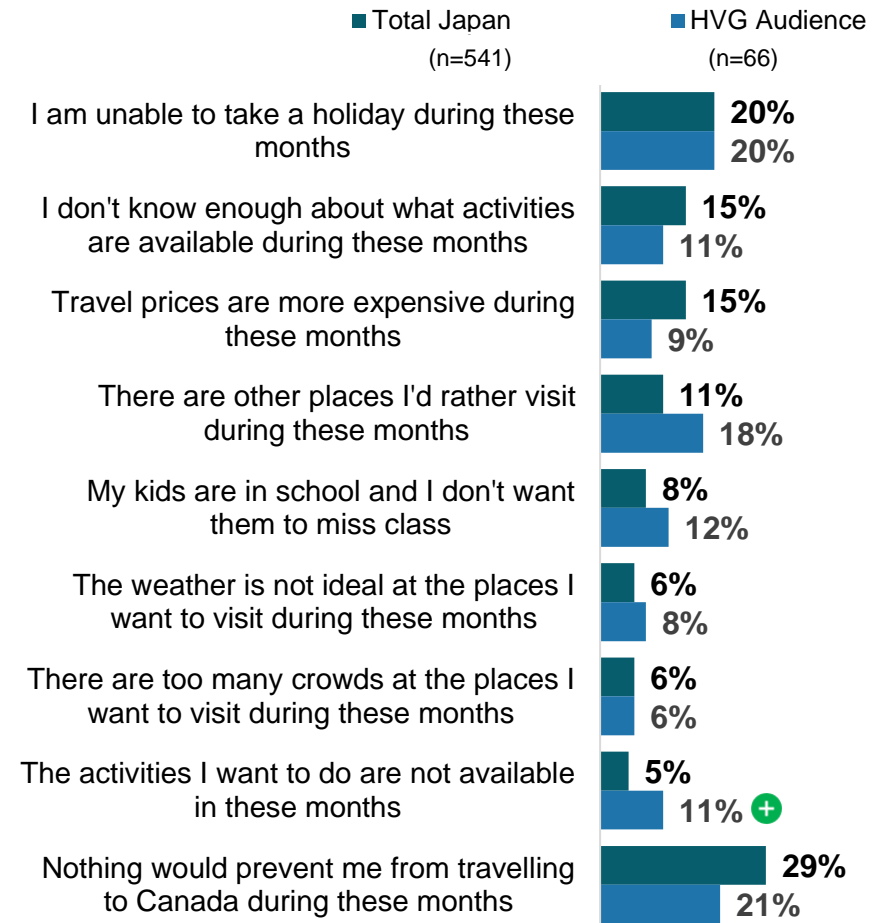
Motivators & Barriers for Fall Travel to Canada



Motivators for Fall Travel



Barriers for Fall Travel



Base: Those in the dream to purchase stages of the path to purchase for Canada and considering visiting Canada or any province/territory in September, October or November E6a. You indicated earlier that you are considering taking a holiday to **Canada** during the months of September, October and/or November... Which of the following describes why you would be interested in travelling to Canada for a holiday during these **autumn months**?

Base: Those in the dream to purchase stages of the path to purchase for Canada and not considering visiting Canada or any province/territory in September, October or November E7. You indicated earlier that you are not considering taking a holiday to **Canada** during the months of September, October and/or November... Which of the following describes why you would **not** be interested in travelling to Canada for a holiday during these **autumn months**?

Japan GTRP – April 2024

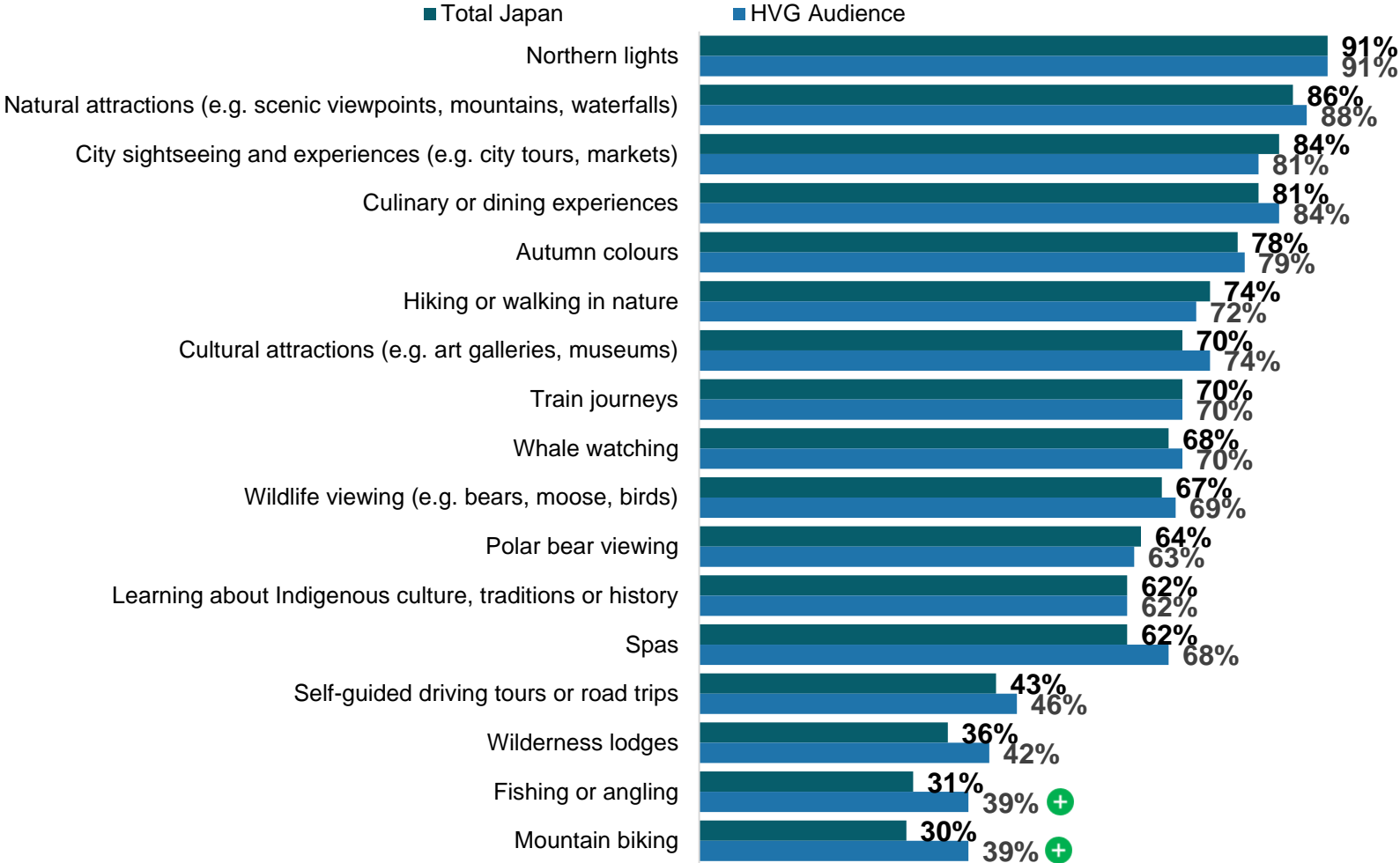
+ / - = significantly higher/lower result (vs. Total)



Interest in Fall Activities in Canada



% Somewhat/Very interested



Base: Those in the dream to purchase stages of the path to purchase for Canada (n=926); HVG (n=128)
 E11. What is your level of interest in the following activities or experiences in Canada during the autumn season?

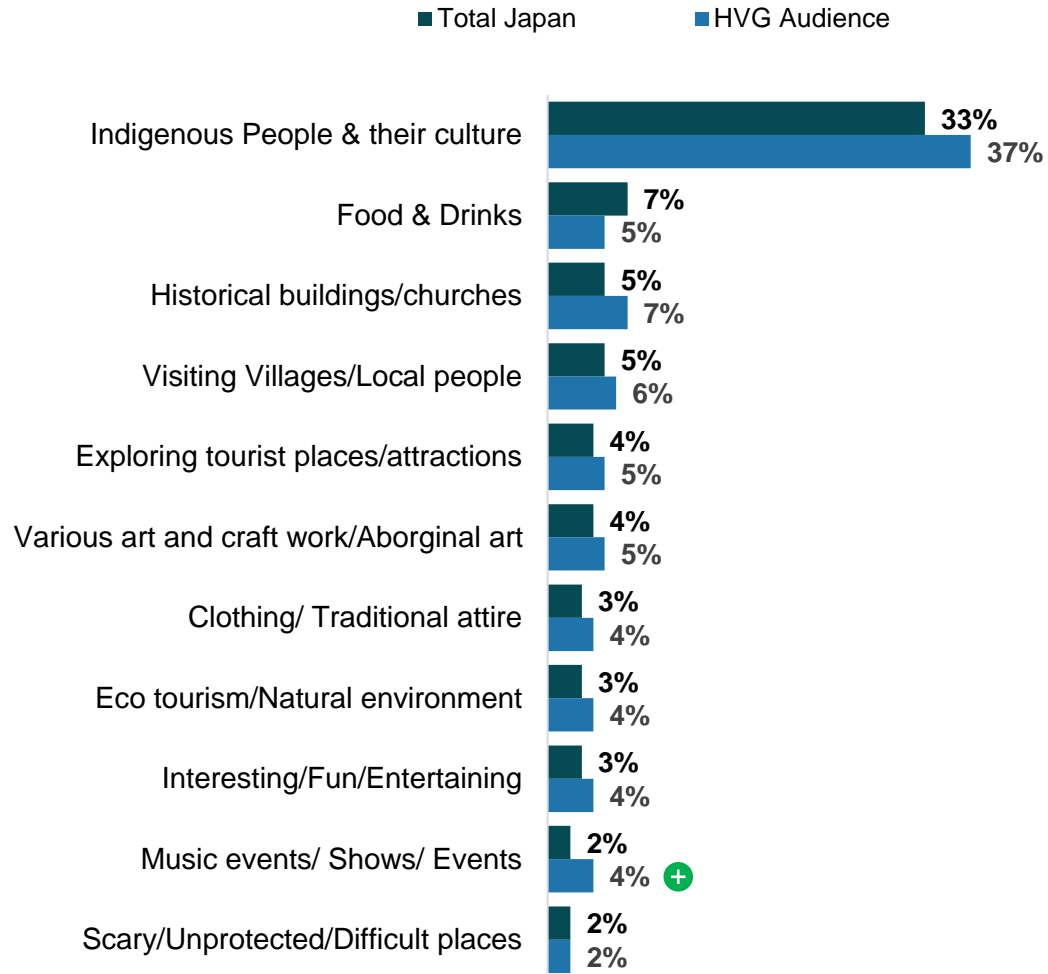




Indigenous Tourism



Unaided Mentions – Indigenous Cultural & Tourism Activities

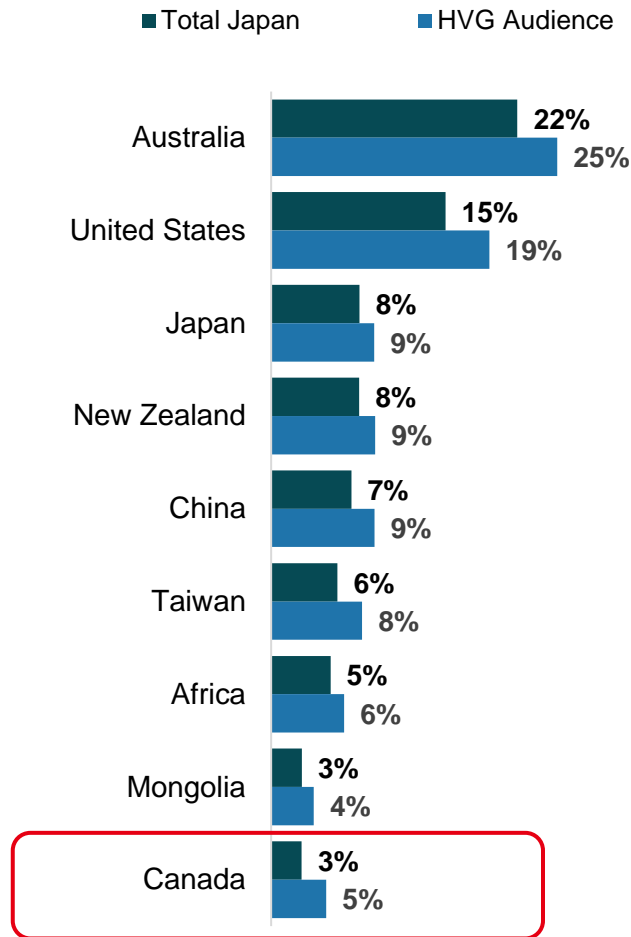


Indigenous Peoples Description

Indigenous peoples are descendants of the original inhabitants of a country or region before people of different cultures or origins arrived. They have unique traditions and ways of life that are often distinct from the larger societies where they live. Indigenous tourism businesses are owned or operated by Indigenous people.



Unaided Indigenous Tourism Destinations

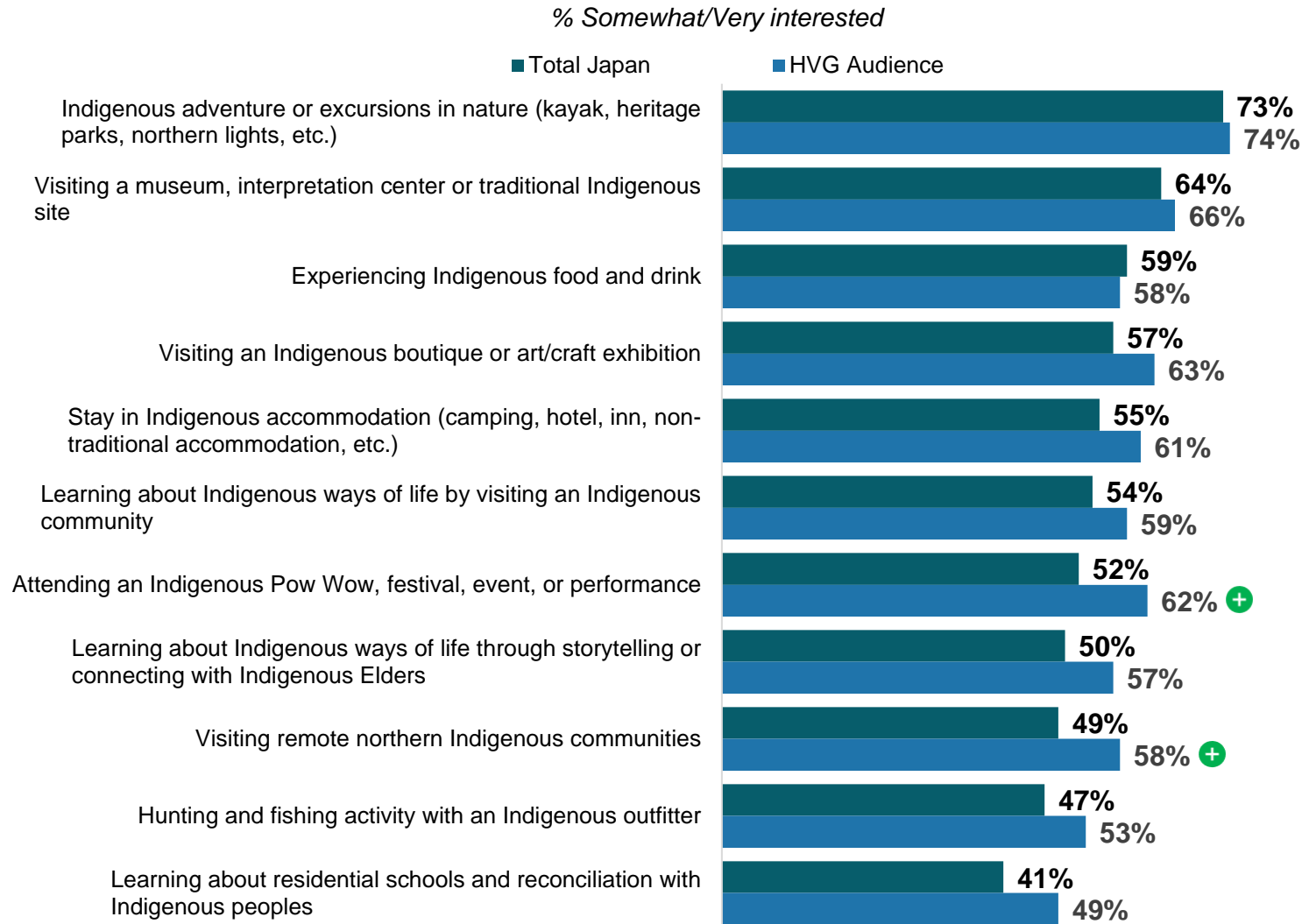


Indigenous Peoples Description

Indigenous peoples are descendants of the original inhabitants of a country or region before people of different cultures or origins arrived. They have unique traditions and ways of life that are often distinct from the larger societies where they live. Indigenous tourism businesses are owned or operated by Indigenous people.

65 Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1501); HVG (n=189)
 B4. [DESCRIPTION] What destinations come to mind when thinking about **Indigenous tourism**? (Please list up to 3 destinations. You can mention destinations within or outside of East Asia (e.g., China, Hong Kong, Macau, Japan, South Korea and Taiwan).) [DESCRIPTION] Please note: You do not have to limit your responses to destinations you are considering for a holiday trip.

Interest in Indigenous Cultural & Tourism Activities



Indigenous Tourism Description

As you may or may not know, in Canada, Indigenous tourism businesses are majority-owned or operated by Indigenous peoples (First Nations, Métis or Inuit). The social and economic benefits of Indigenous tourism businesses goes back to the business owners and/or the communities where they are based.





Most Recent Trip

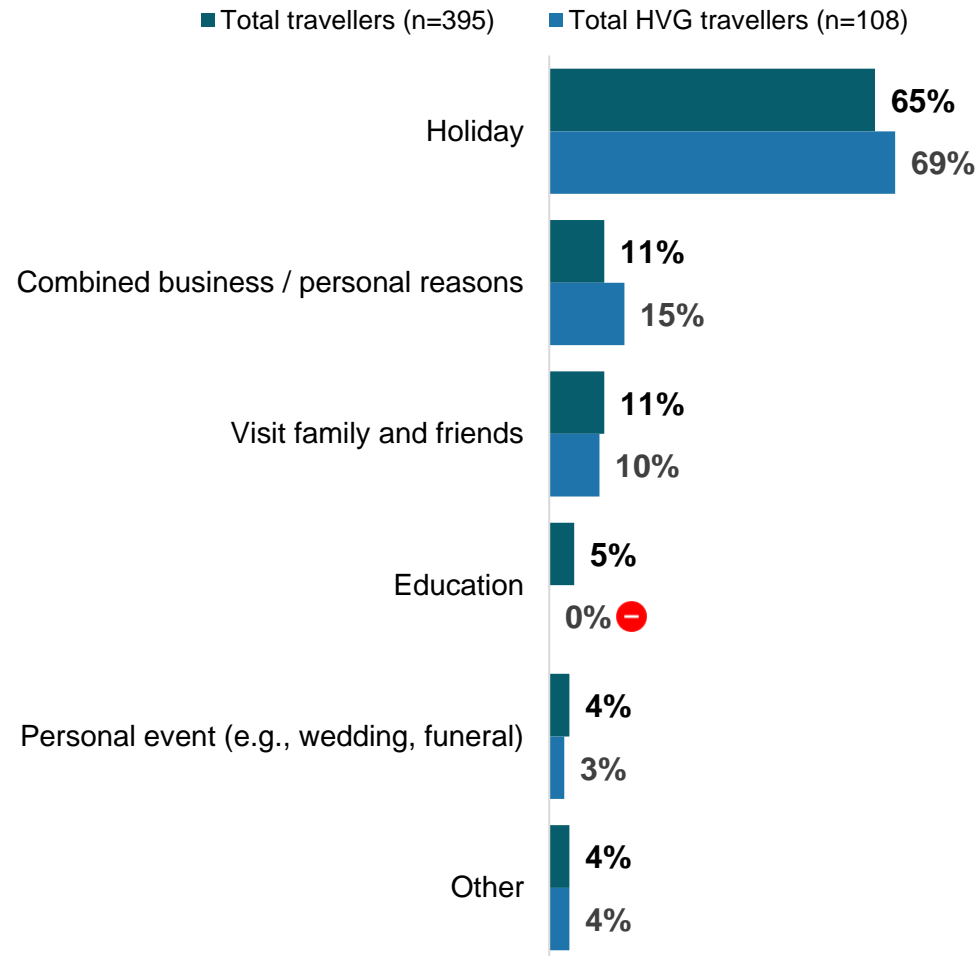


Lake Louise
Alberta

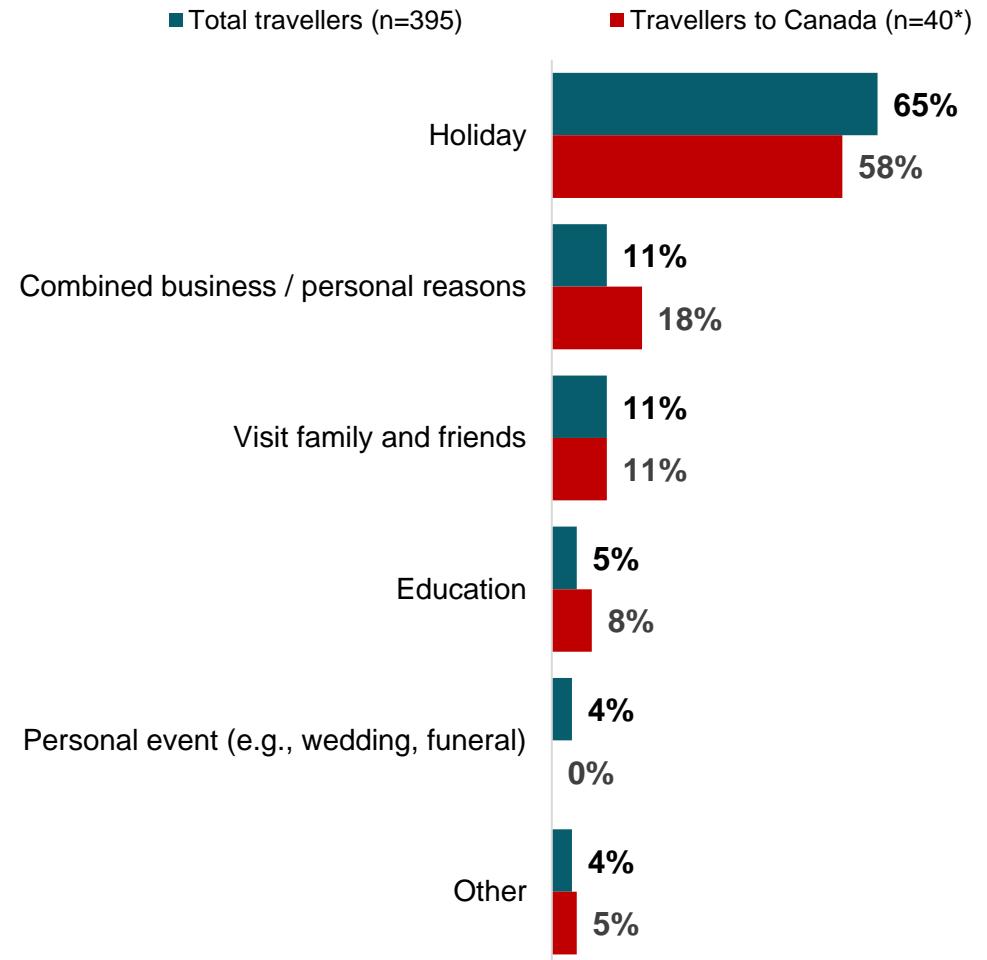


Main Purpose of Recent Trip

Total Travellers to Any Destination vs. HVG Travellers to Any Destination



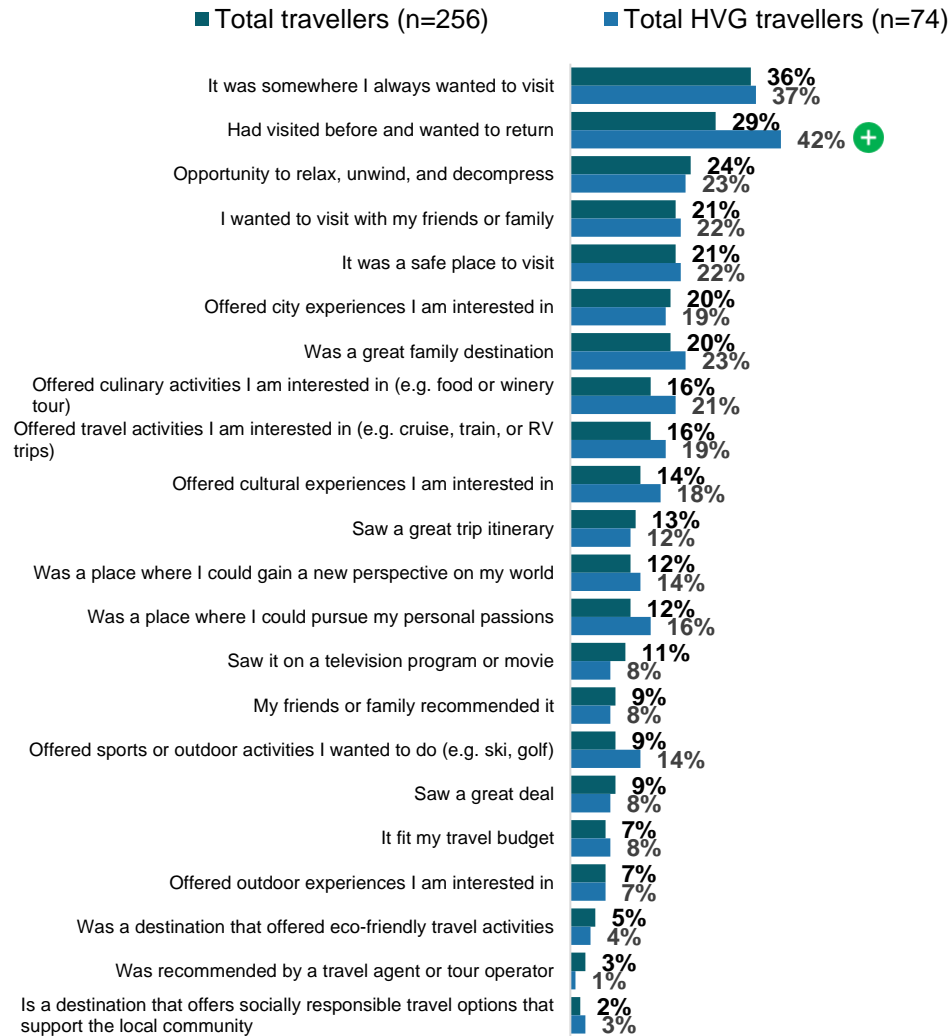
Total Travellers to Any Destination vs. Total Travellers to Canada



68 Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination (n=395); HVG (n=108); Travellers to Canada (n=40*)
 F2. What was the main purpose of this trip? (Select one)
 *Small base size, interpret with caution (n<50)

Factors in Choosing Destination for Recent Trip

Total Travellers to Any Destination vs. HVG Travellers to Any Destination

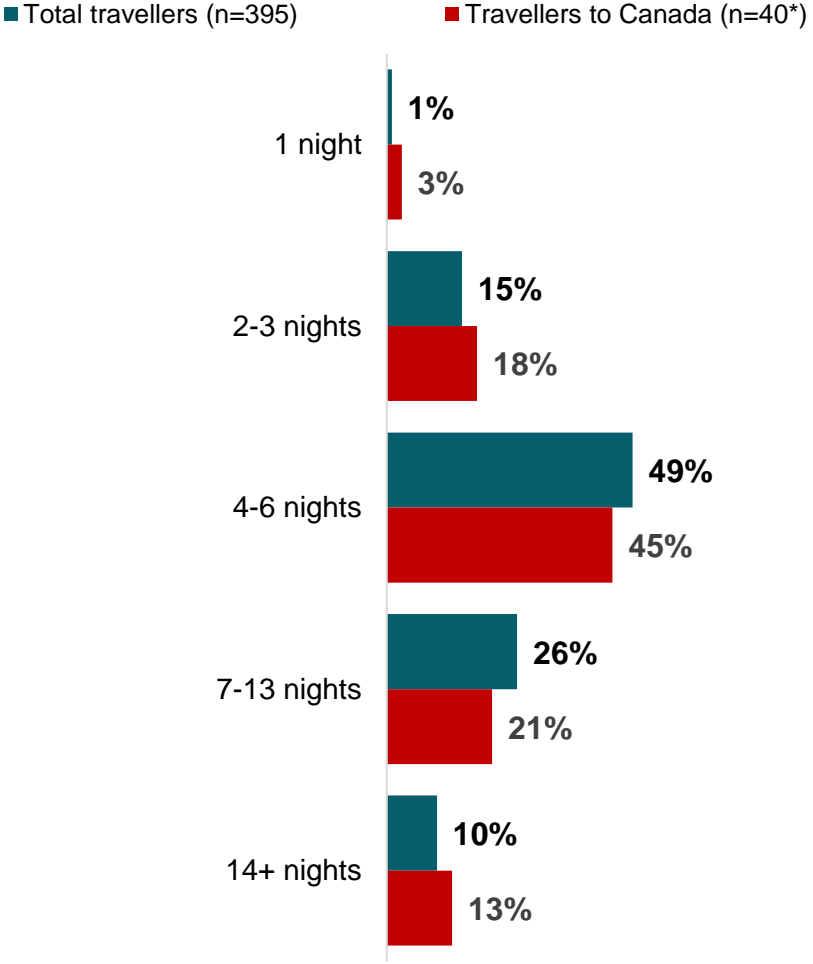
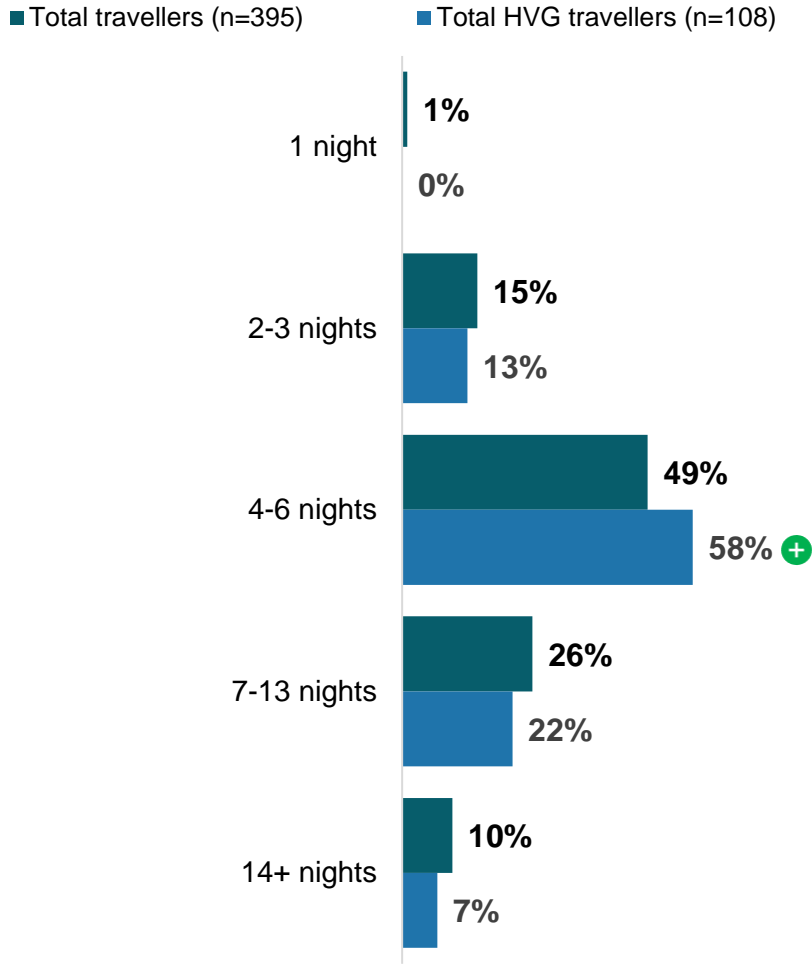


Nights Spent During Recent Trip



Total Travellers to Any Destination vs. HVG Travellers to Any Destination

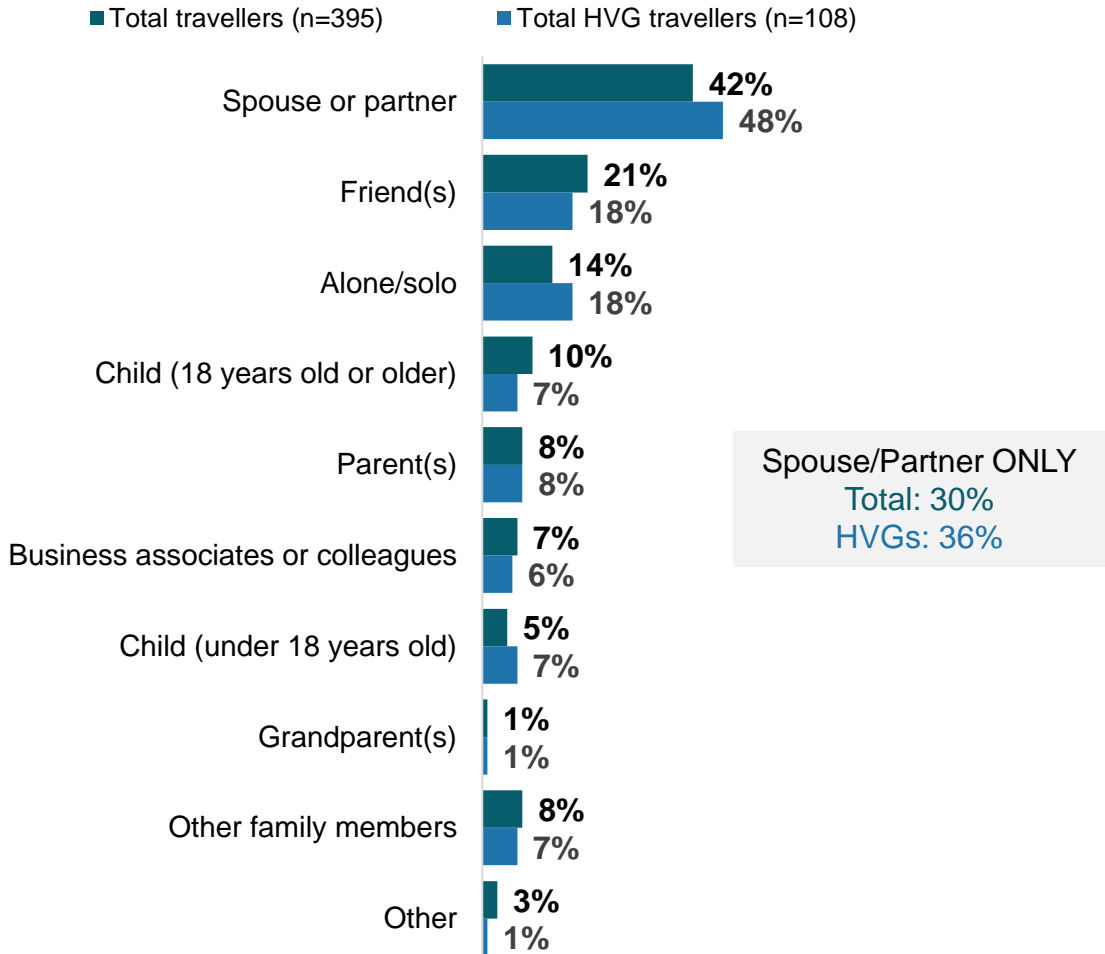
Total Travellers to Any Destination vs. Total Travellers to Canada



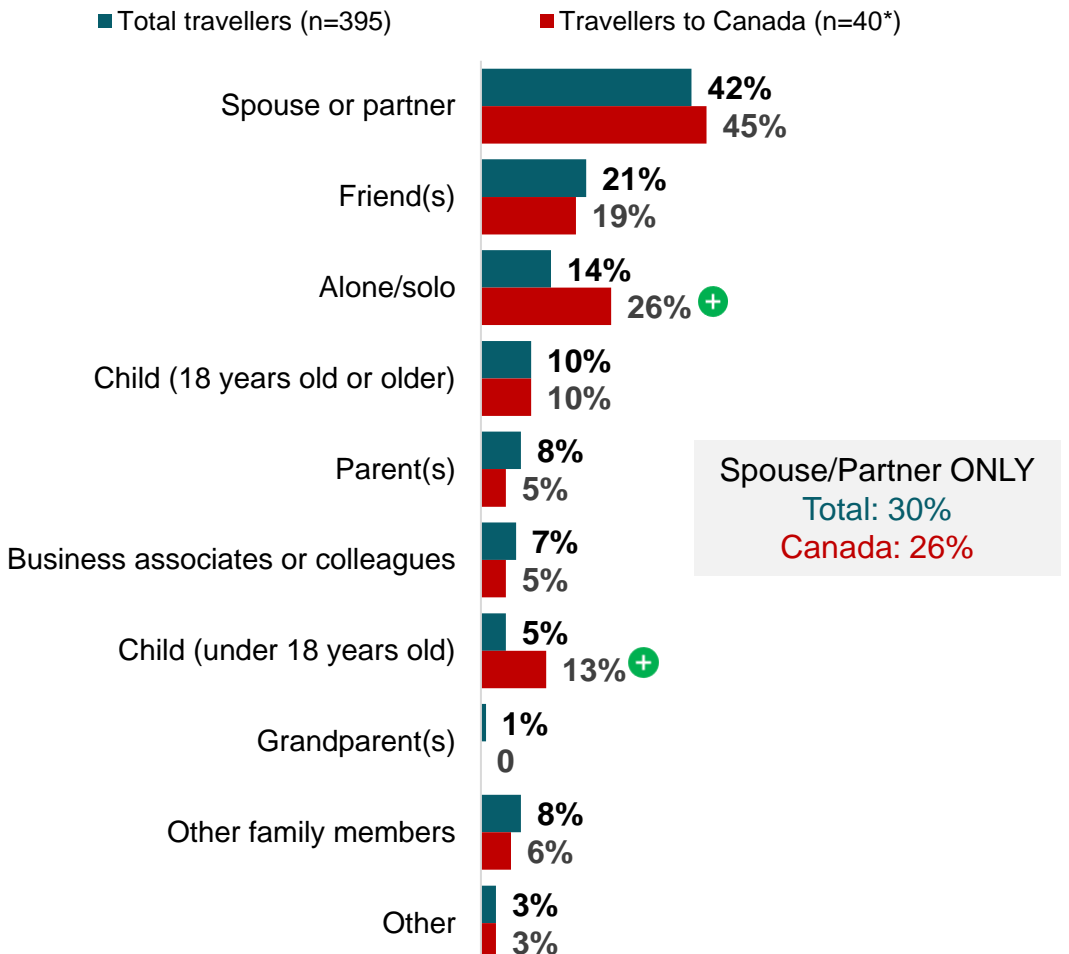
70 Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination (n=395); HVG (n=108); Travellers to Canada (n=40*)
 F4. How many nights did you spend in this destination?
 *Small base size, interpret with caution (n<50)

Travel Party of Recent Trip

Total Travellers to Any Destination vs. HVG Travellers to Any Destination



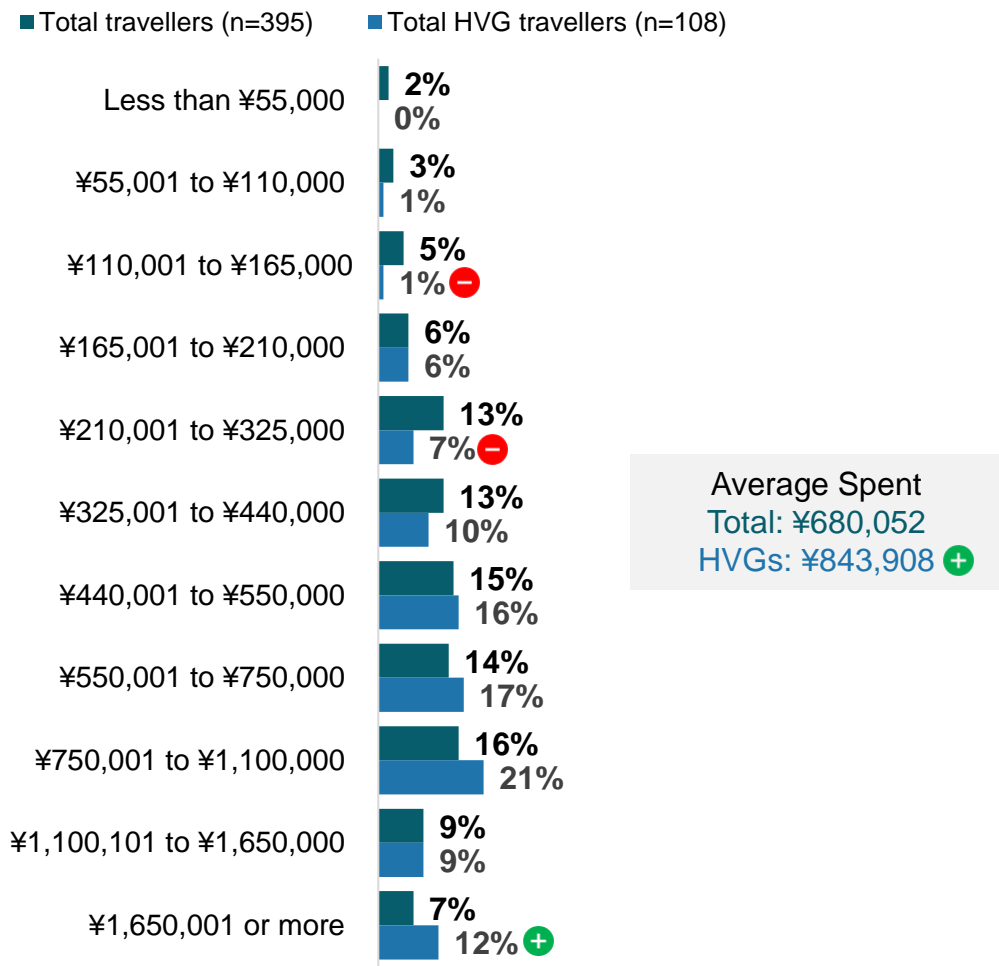
Total Travellers to Any Destination vs. Total Travellers to Canada



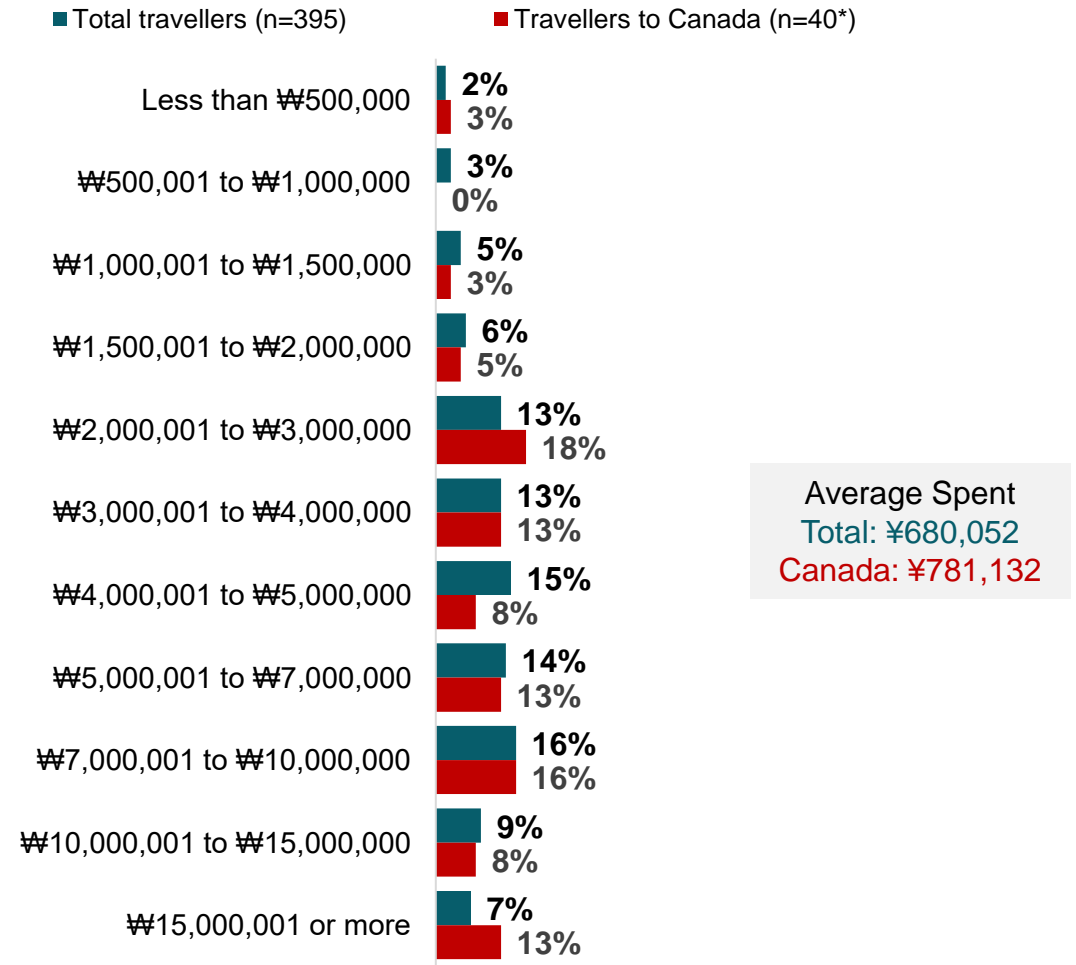
71 Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination (n=395); HVG (n=108); Travellers to Canada (n=40*)
 F5. With whom did you travel on this trip? (Select all that apply)
 *Small base size, interpret with caution (n<50)

Amount Spent for Recent Trip

Total Travellers to Any Destination vs. HVG Travellers to Any Destination



Total Travellers to Any Destination vs. Total Travellers to Canada

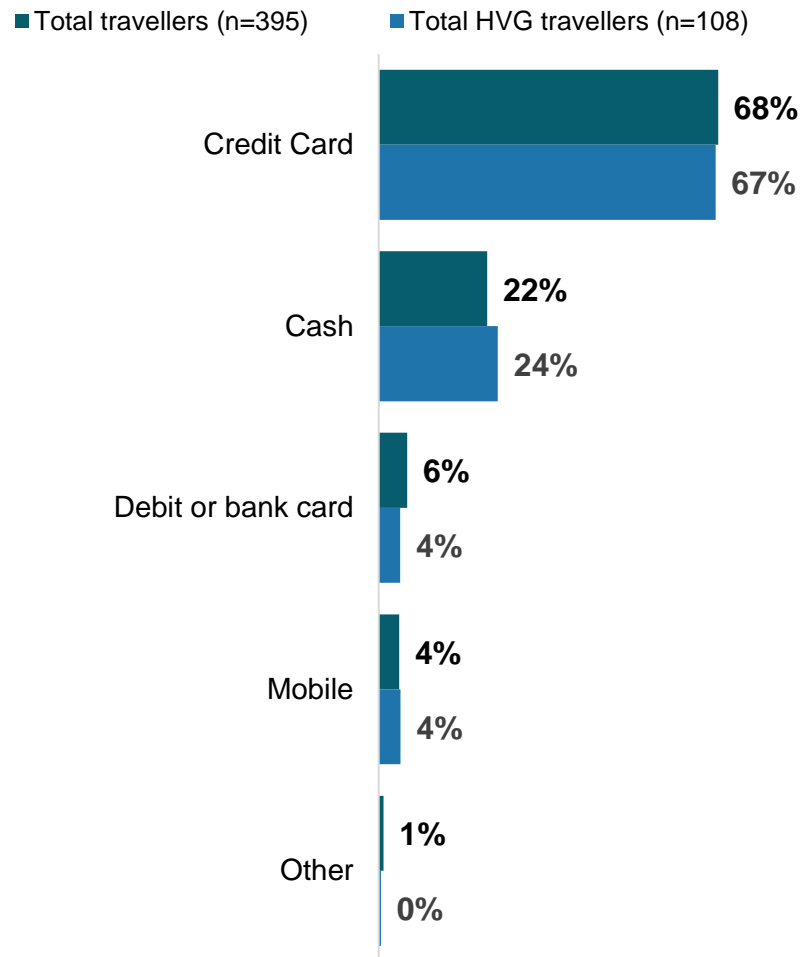


Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination (n=395); HVG (n=108); Travellers to Canada (n=40*)
 F6. Overall how much did you spend on this trip? Consider the primary transportation to and from the destination, accommodation, dining, activities, shopping, and any other expenses.
 *Small base size, interpret with caution (n<50)

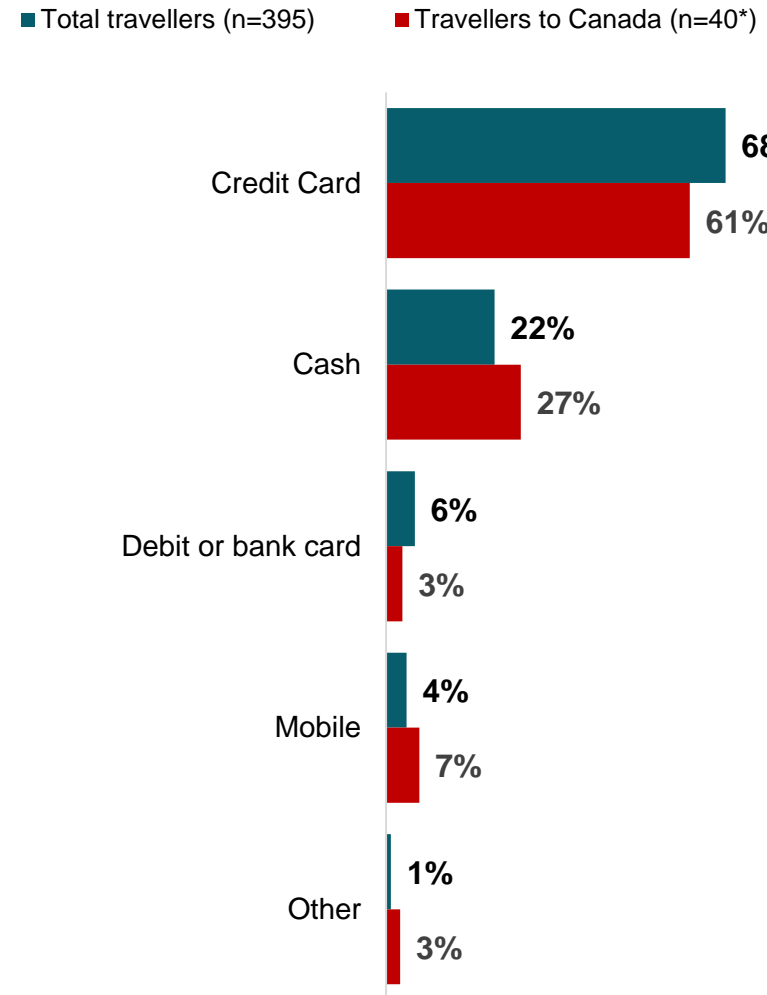


Payment Methods for Recent Trip

Total Travellers to Any Destination vs. HVG Travellers to Any Destination



Total Travellers to Any Destination vs. Total Travellers to Canada

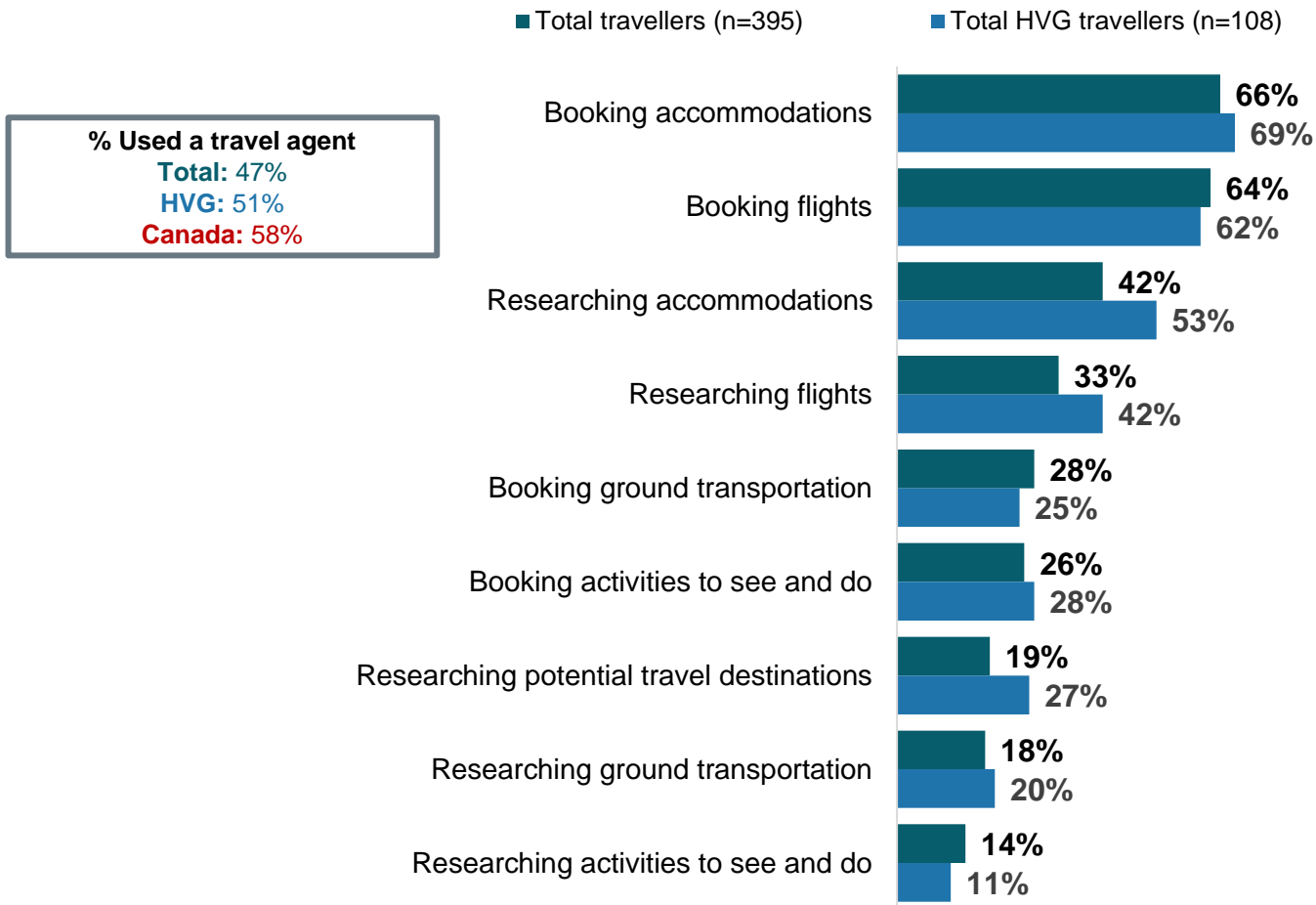


Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination (n=395); HVG (n=108); Travellers to Canada (n=40*)
 F8. Approximately what percentage of your purchases did you make during your trip with each of the following payment methods? Your best guess is fine. (Enter one number per row. Your total must add to 100%).
 *Small base size, interpret with caution (n<50)



Travel Agents/Tour Operator Usage For Recent Trip

Total Travellers to Any Destination vs. HVG Travellers to Any Destination



Travellers to Canada base size too small to report (n=22**)

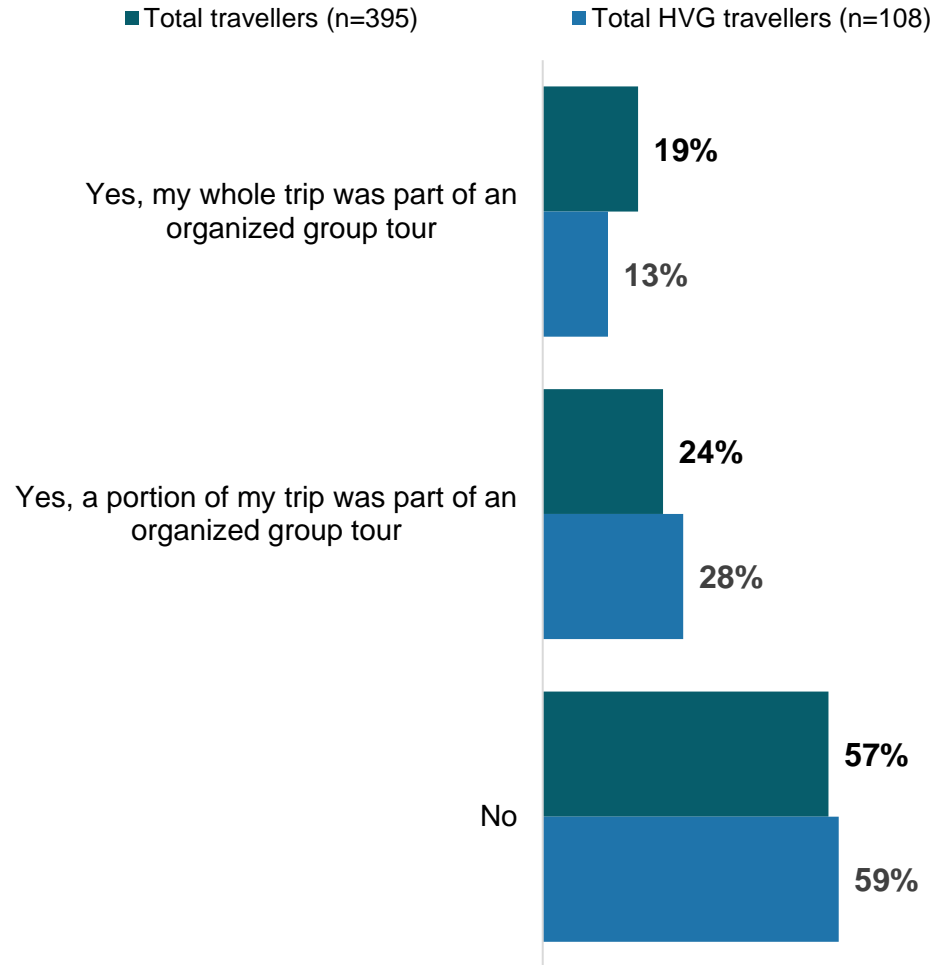
Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination, Used a Travel Agent/Tour Operator (n=185); HVG (n=55)
 F9. Travel agents offer personalized service to help individuals, groups, and business travellers plan and organize their travel schedules, from purchasing tour packages to booking flights and hotels. Examples of travel agents include H.I.S or JTB, they do not include online booking engines like Expedia or Rakuten. Did you use a travel agent or tour operator to help you research or book your trip? (Select one) F10. Which of the following did a travel agent or tour operator help you with?

**Base size too small to report (n<25)

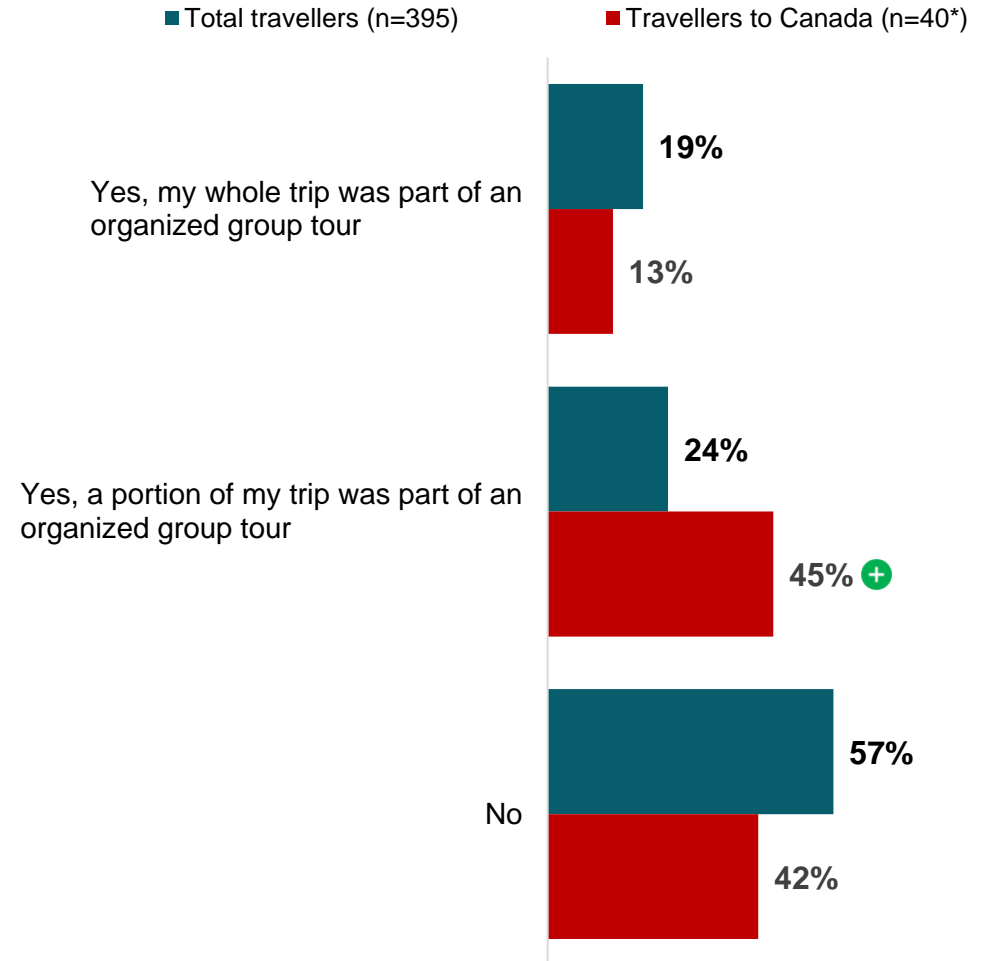


Organized Group Tour Usage For Recent Trip

Total Travellers to Any Destination vs. HVG Travellers to Any Destination



Total Travellers to Any Destination vs. Total Travellers to Canada



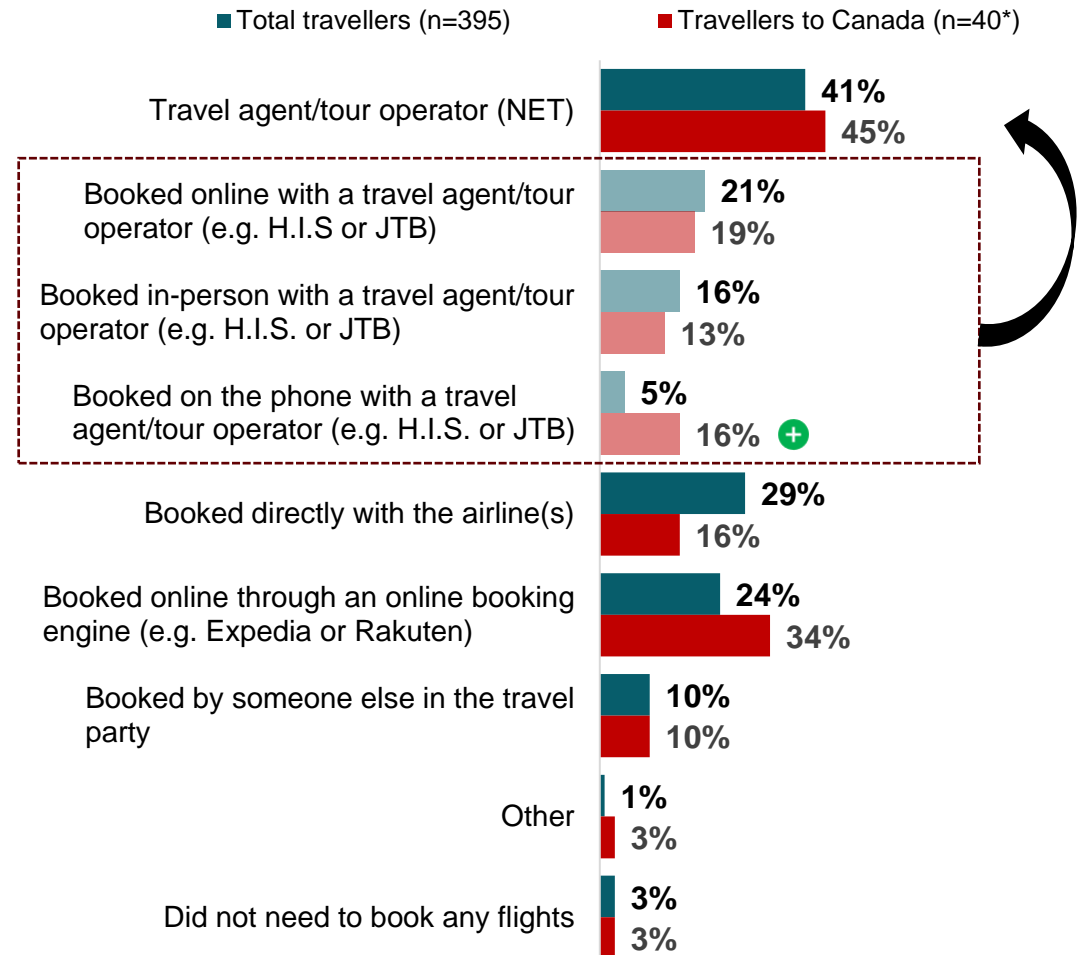
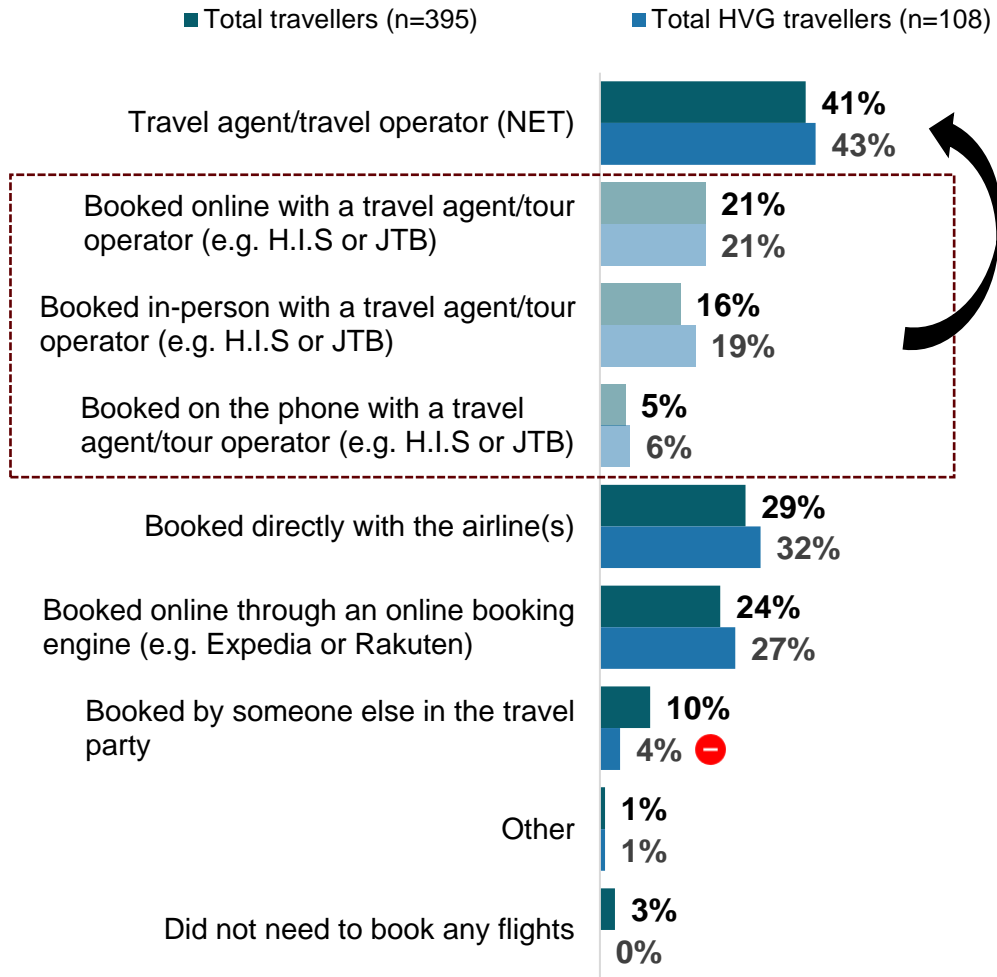
Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination (n=395); HVG (n=108); Travellers to Canada (n=40*)
 F11. An organized group tour consists of a package where any combination of accommodation, transportation, food and/or activities are included as a multi-day itinerary. Did you travel as a part of an organized group tour on this trip?
 *Small base size, interpret with caution (n<50)



Booking Flights For Recent Trip

Total Travellers to Any Destination vs. HVG Travellers to Any Destination

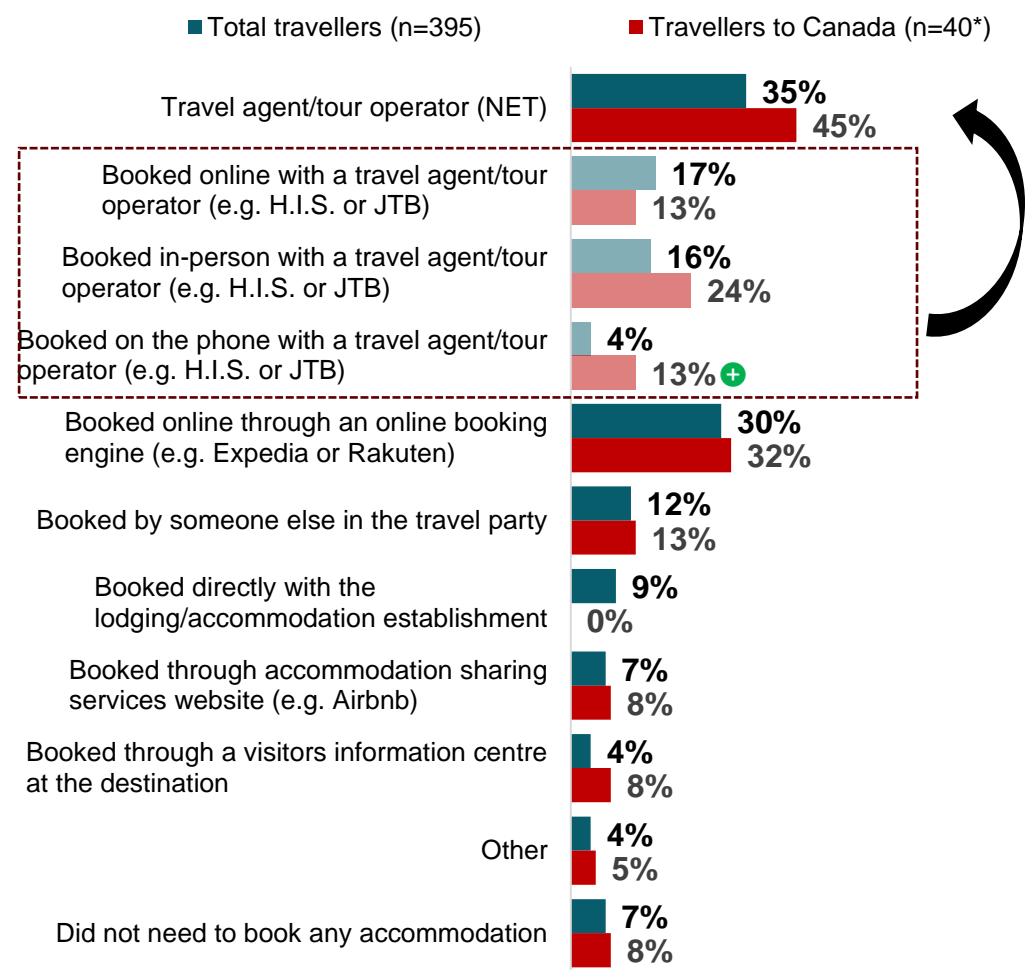
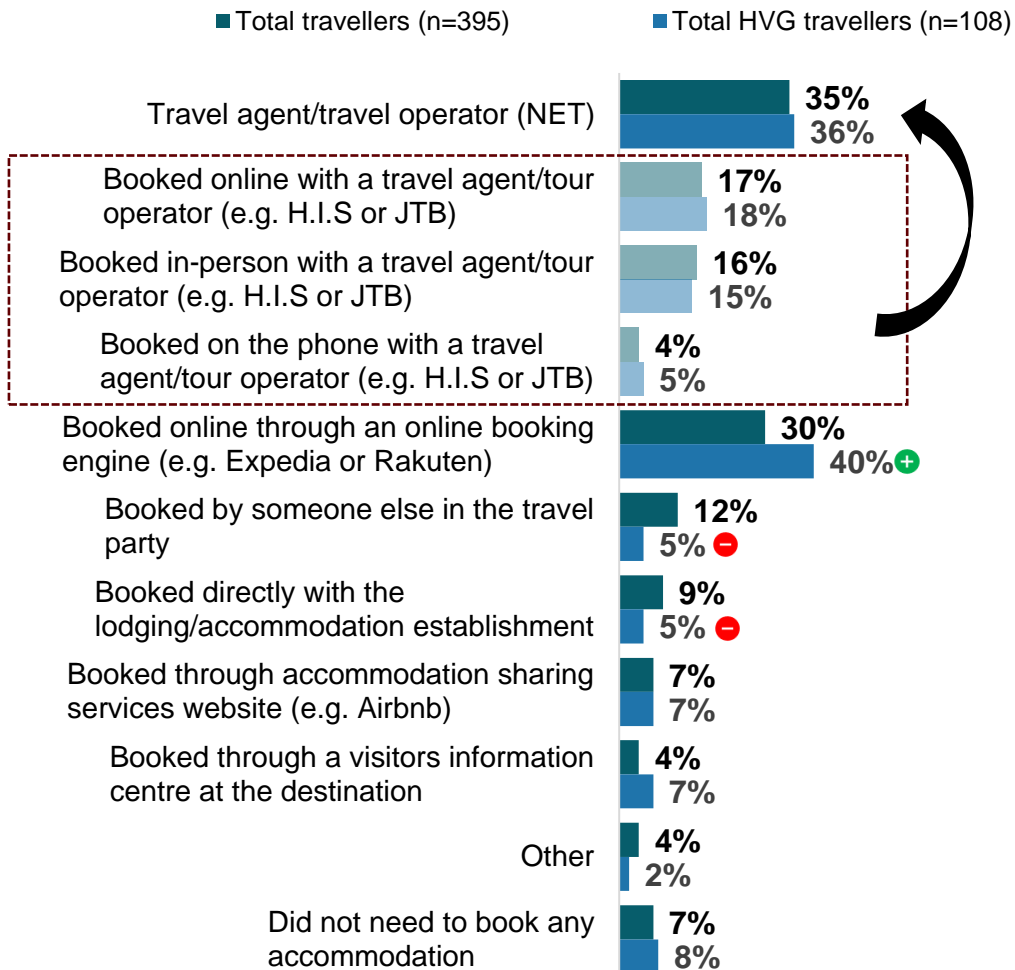
Total Travellers to Any Destination vs. Total Travellers to Canada



Booking Accommodations For Recent Trip

Total Travellers to Any Destination vs. HVG Travellers to Any Destination

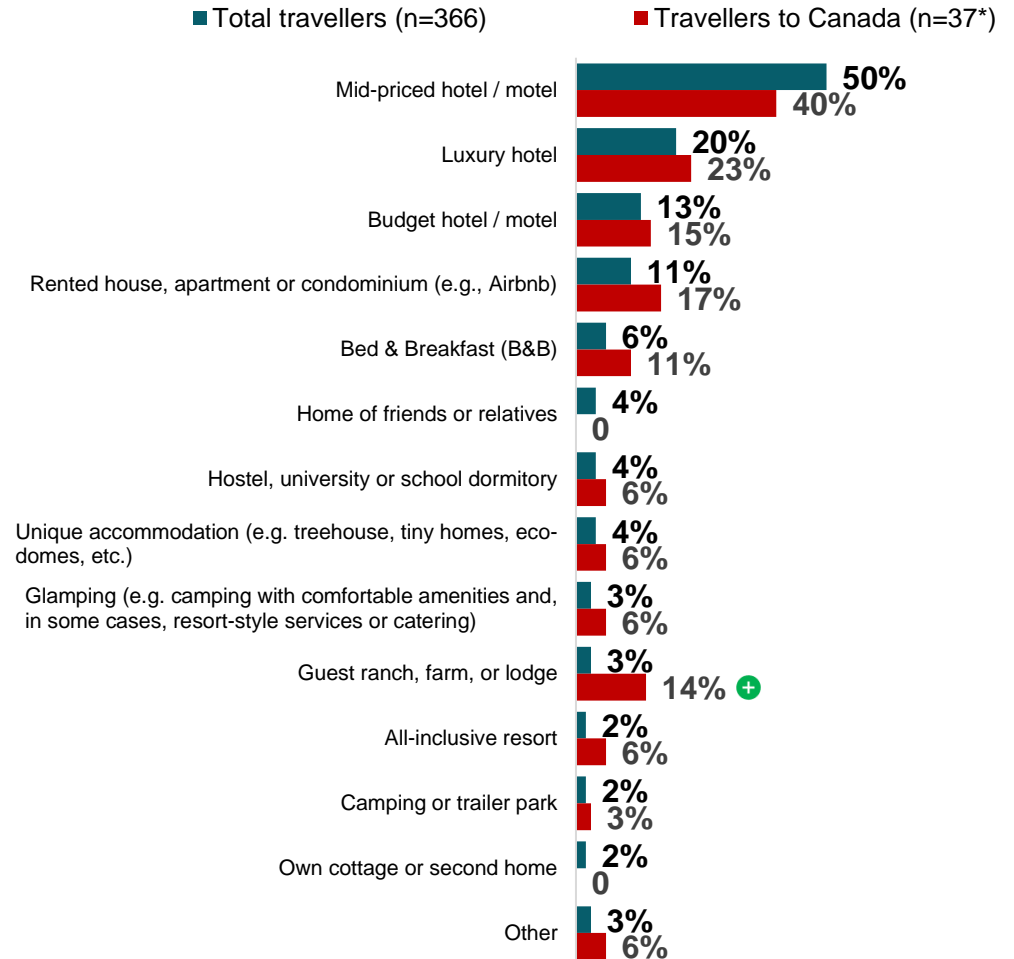
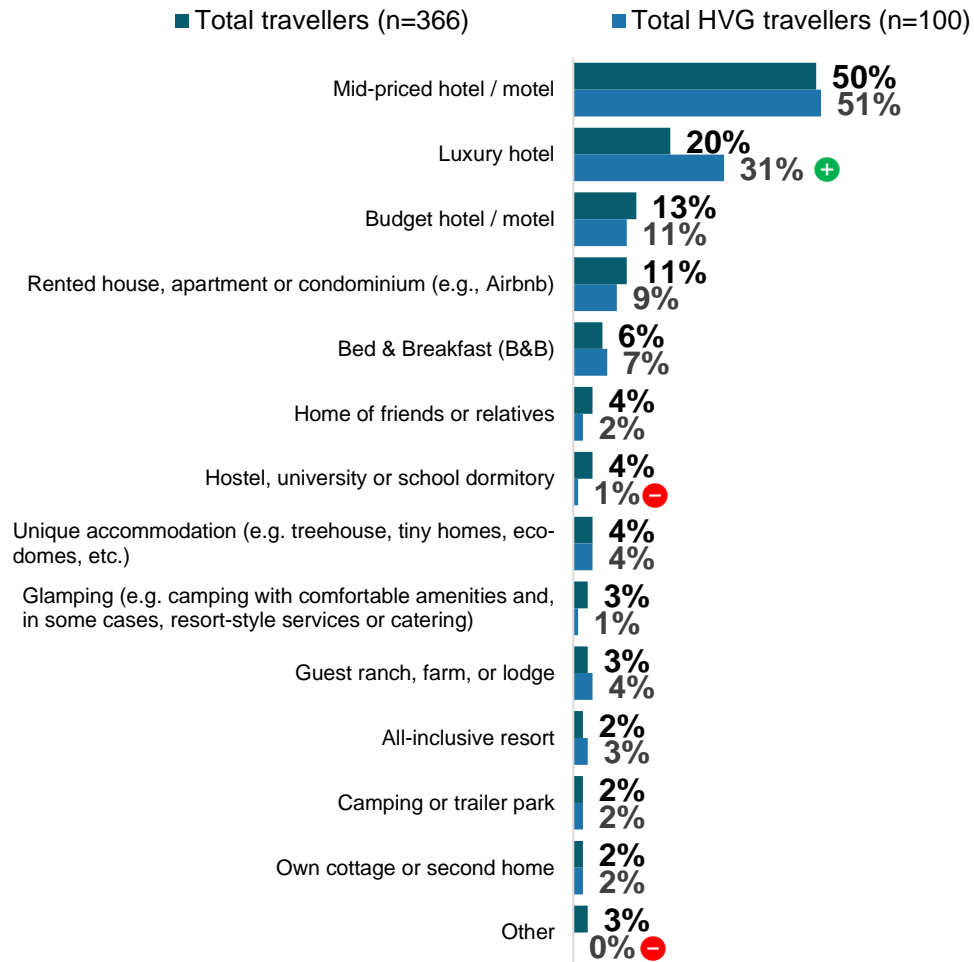
Total Travellers to Any Destination vs. Total Travellers to Canada



Type of Accommodations For Recent Trip

Total Travellers to Any Destination vs. HVG Travellers to Any Destination

Total Travellers to Any Destination vs. Total Travellers to Canada



78 Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination, Booked Accommodation (n=366); HVG (n=100); Travellers to Canada (n=37*)
 F14. Which type of accommodation did you stay in during this trip? (Select all that apply)
 *Small base size, interpret with caution (n<50)

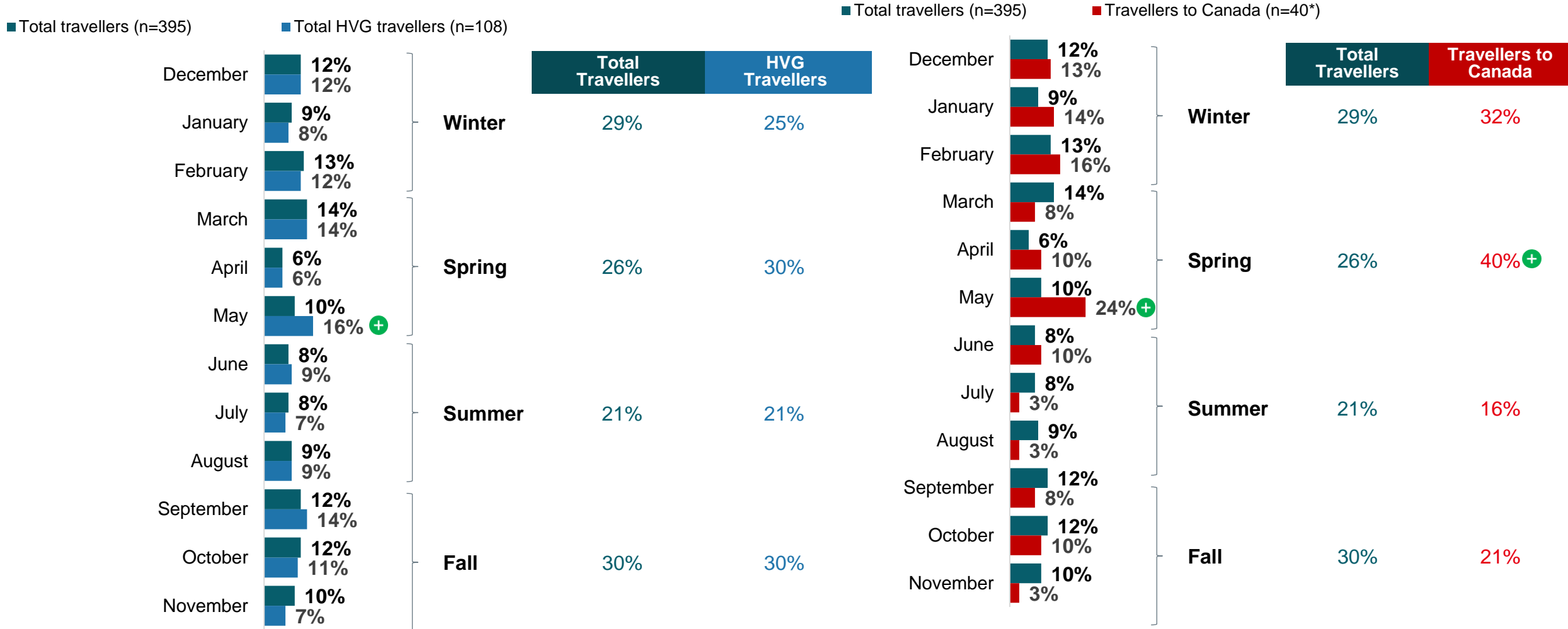


Time of Year Travelled For Recent Trip



Total Travellers to Any Destination vs. HVG Travellers to Any Destination

Total Travellers to Any Destination vs. Total Travellers to Canada



79 Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination (n=395); HVG (n=108); Travellers to Canada (n=40*)
 F15. Which time of the year did you take this trip? (Select all that apply)
 *Small base size, interpret with caution (n<50)





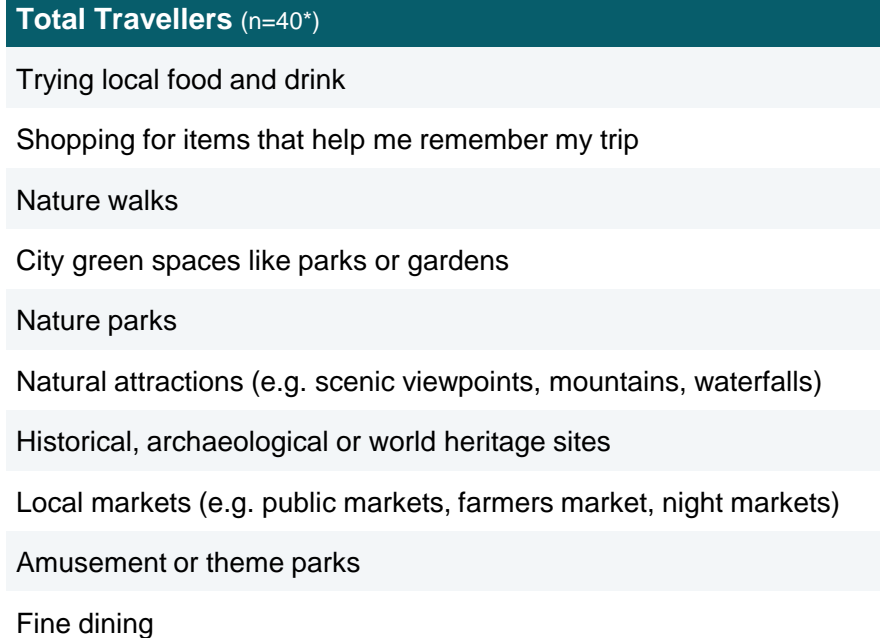
Most Recent Trip to Canada



 Niagara Falls
Ontario



Top 10 Activities Participated in During Recent Trip to Canada



Total HVG travellers to Canada base size too small to report (n=16**)

81

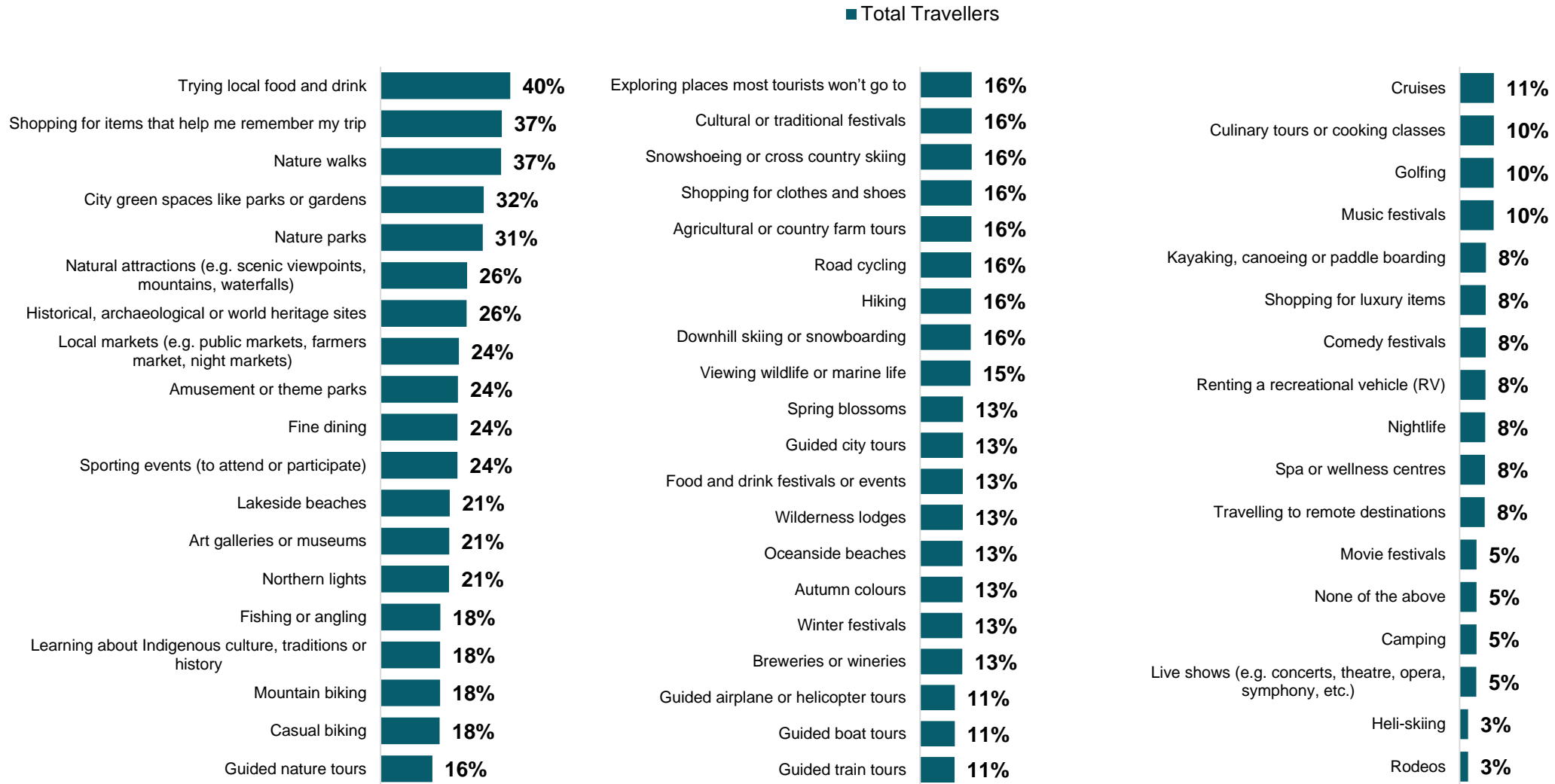
Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to Canada (n=40*)
F16. Which of the following activities, if any, did you participate in during your recent trip to Canada? (Select all that apply)
*Small base size, interpret with caution (n<50)

Japan GTRP – December 2023

+ / - = significantly higher/lower result (vs. Total)



Activities Participated in During Recent Trip to Canada

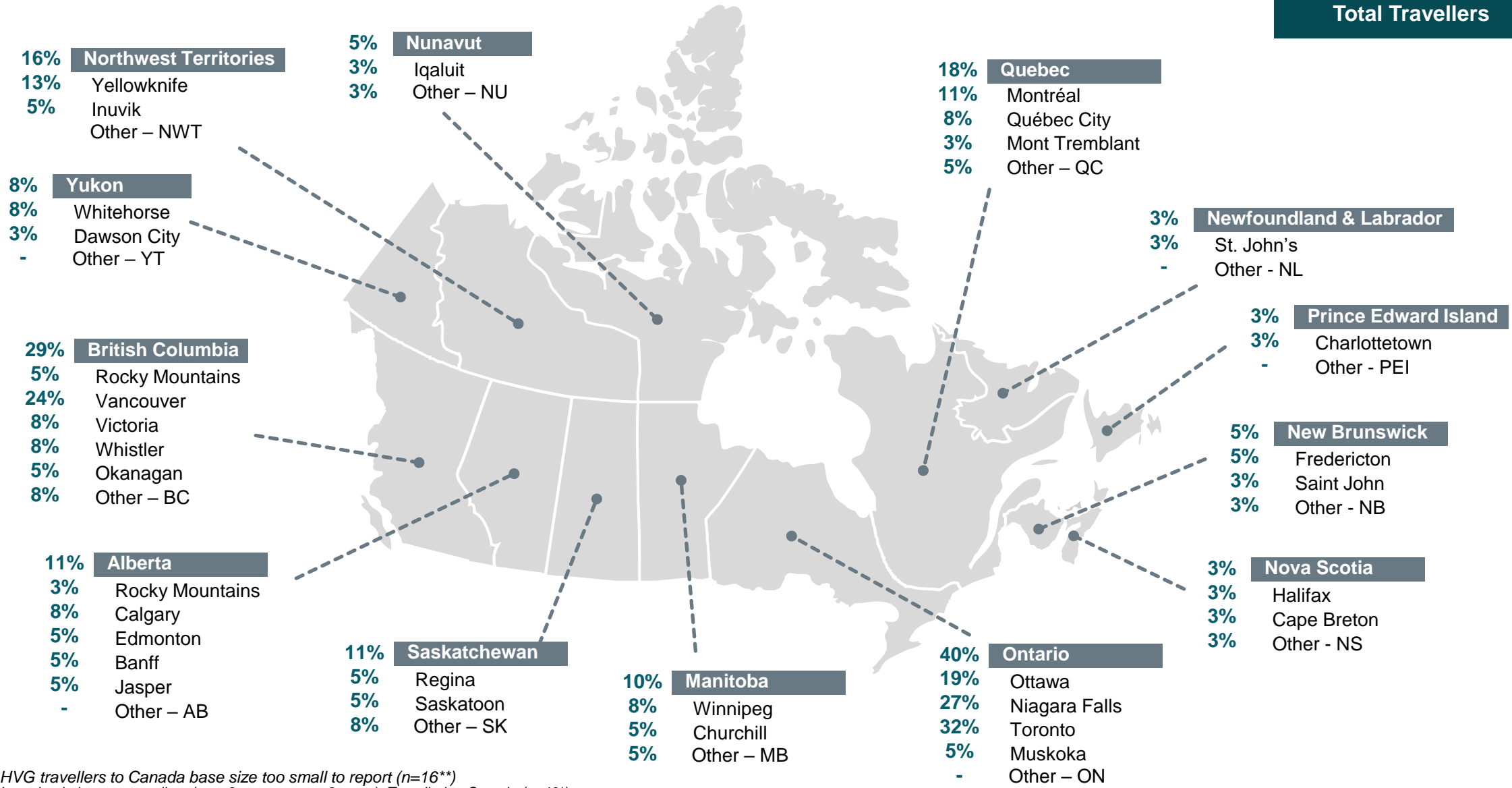


Total HVG travellers to Canada base size too small to report (n=16**)



Canadian Destinations Visited During Recent Trip

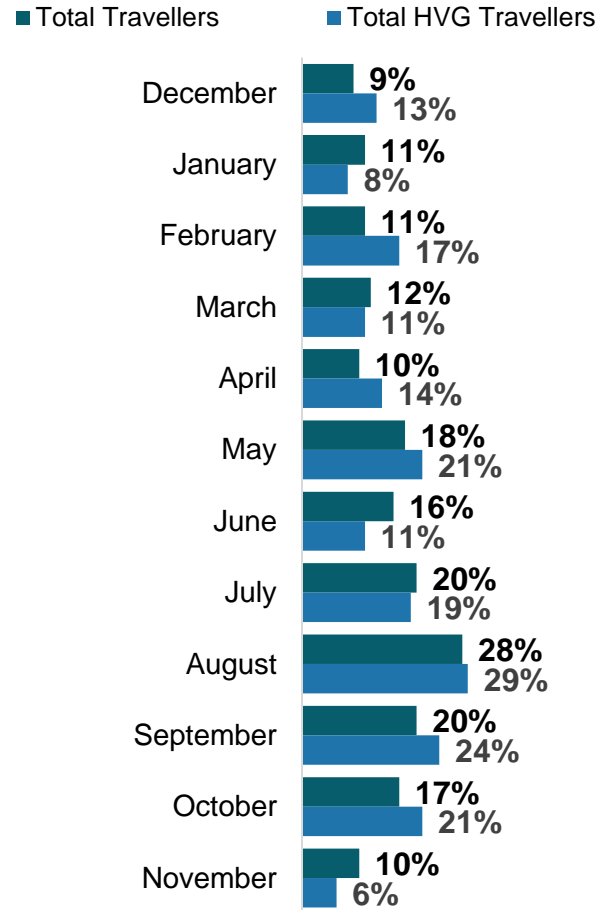
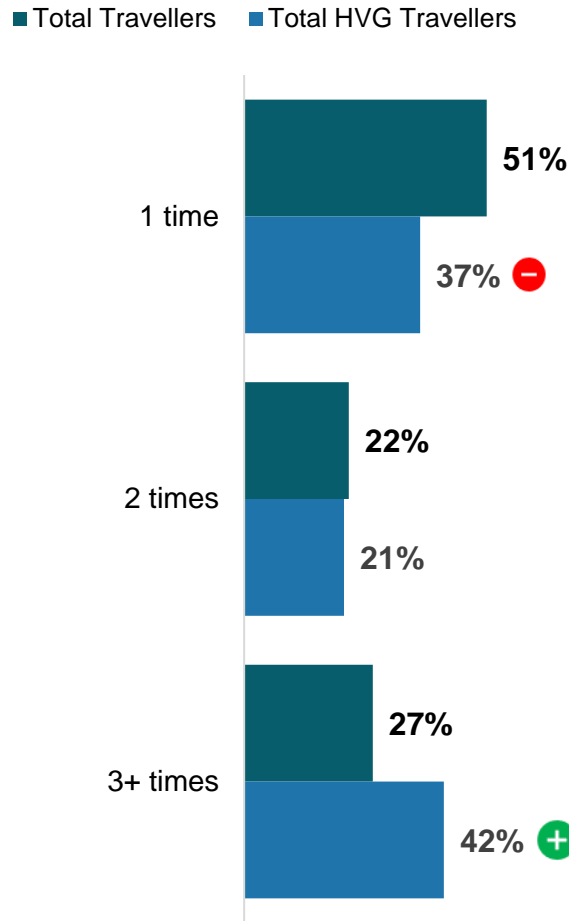
Total Travellers



Total HVG travellers to Canada base size too small to report (n=16**) Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to Canada (n=40*) F17. Which of the following Canadian provinces or territories did you visit on this trip? (Select all that apply) F18a-m. Within [PROVINCE], which travel destinations did you visit? (Select all that apply) *Small base size, interpret with caution (n<50)



Number of Visits Ever & Time of Year Visited Canada



	Total Travellers (%)	Total HVG Travellers (%)
Winter	24%	33%
Spring	31%	35%
Summer	49%	45%
Fall	37%	41%

84 Base: Long-haul pleasure travellers (past 3 years or next 2 years)
 F19. Approximately, how many times have you been to Canada? Ever Visited Canada (excluding None) (n=370); HVG (n=63)
 F20. What time of year have you ever visited Canada? Select all that apply. Visited Canada (n=378); HVG (n=64)
 *Small base size, interpret with caution (n<50), **Base size too small to report (n<25)

+ / - = significantly higher/lower result (vs. Total)



Demographics

	All Long-haul Travellers (n=1501)	HVG Audience (n=189)
Gender		
Male	50%	60% +
Female	50%	40% -
Age		
18 to 34	34%	29%
35 to 54	21%	20%
55 or older	46%	51%
Children in household under the age of 18		
Yes	21%	28% +
Employed		
Yes	61%	66%
Household Income (Annually)		
Under 3M Yen	14%	3% -
3M Yen to 8M Yen	38%	10% -
8M Yen or more	27%	82% +



THANK YOU

For any questions, please reach out to research@destinationcanada.com



CANADIAN TOURISM DATA
collective