

CONFIDENTIAL

2023 GLOBAL TRAVELLER RESEARCH PROGRAM

JAPAN STRATEGIC REPORT



CANADIAN TOURISM DATA
collective

Focus of This Report

- *Study Overview*
- *Key Insights*
- *Overall Travel Outlook & Trends*
- *Canada vs. Competitive Destinations*
- *Increasing Fall & Winter Visitation*
- *Indigenous Tourism*
- *Sustainability*



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

TOTAL JAPAN PERSPECTIVE

Where applicable, insights are drawn from two of YouGov’s proprietary syndicated data products, YouGov Global Travel Profiles and YouGov DestinationIndex to provide overall trends among the population of Total Japanese 18+

- 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.





Travel Outlook & Trends

- The **appetite for domestic travel** in Japan is **twice** as high as that for **long-haul travel**
- **Japanese travel demand** is highest in the **Fall and Spring**, followed by the **Summer**. Interestingly, **approximately half** of all **travellers to Canada** visit during the **Summer**
- When Japanese travellers book their **flights** for long-haul trips, **many (41%) book via travel agents/operators**. This is similar among **HVGs (43%)**. Another **one-third book directly through the airline**
- For **accommodations**, slightly more than one-third **book via travel agents/operators**, followed closely by **an online booking engine**
- **Extreme weather events & international conflicts** are of concern for travellers, with about one in five changing their travel plans due to either of these issues



Canada vs. Competitive Set

- For the long-haul Japanese traveller, the **US is by far the most popular destination**. Other top destinations include **Australia, France, Italy** and the **UK**. While HVGs are more likely to have visited **Canada (33% vs. 25% for Total)**, it **ranks just 7th** on the list in terms of past visitation
- The majority of those who have ever visited have only been to Canada once (51%), putting **repeat visitation at less than half**. Of note, the **82% of Canada visitors (ever)** who have **also visited the US**
- When it comes to promotion of holiday destinations, **most destinations have negative NPS scores, except Iceland and Italy**. **Canada ranks fifth** with -6 score. **Among HVGs**, however, Canada has an NPS score of +18, ranking 1st
- **The next 2-year immediate potential for Canada is 1.4M**, including 0.28M HVGs
- When looking at the consideration funnels, the **lack of commitment to long-haul destinations** is noted, with **low conversion from dream to consider**. This further reinforces the **low levels of interest in long-haul travel** and the **importance of distinguishing Canada** in terms of its **functional and emotional advantages** to encourage visitation





Key Drivers & Opportunities

- The **top driver** for consideration among total travellers is ***a place I feel safe visiting***, while HVGs are mostly driven by ***offering good value for money***. Among total travellers, the ***secondary drivers*** also include ***has transport options that make it easy for me to get to from where I live, is a good place to live, and a great place to see wildlife***, while HVGs appreciate ***having great atmosphere, a culture I want to experience, and visiting with family***
- In terms of **brand value statements**, Canada has differentiated itself as having ***wide-open landscapes, enjoying nature while near cities and being a good place to live***
- ***Offering good value for money represents a white space*** in which no one destination dominates
- Canada can capitalize on its strength as ***a safe destination and being a good place to live*** to boost consideration. Enhancements in secondary drivers of ***has transport options that make it easy for me to get to from where I live*** can further improve consideration
- Improvements to ***city and cultural experiences***, and opportunities for ***family and friends' visits*** can serve as secondary factors in driving consideration among HVGs



Fall/Winter Travel

- **Unaided Fall destinations** mentioned were predominantly in **Eastern Asia**, with one fifth being **Japan**
- Canada ranks **closely behind Japan** as a preferred Winter destination among all travellers and holds the **top spot** among HVGs
- About 5.8M Japanese long-haul travellers typically travel in the Fall months while 3M travel in the Winter months, over one third of these travellers have immediate potential to visit Canada
- The top **motivator** for Fall travel to Canada is **ideal weather** and the top barrier is the **inability to take time off**. **Northern Lights** and **natural attractions** are the top activities of interest for travel to Canada during the Fall
- When it comes to Winter visitation, travellers are motivated to visit because of **winter specific tourist attractions, Northern Lights and city sightseeing**. The **top barrier** for travelling during these months is the **cold weather**





Sustainable Travel

- **Half** of Japanese travellers indicate that **sustainability is a priority** when planning travel; **knowing the local culture is not negatively impacted by tourism**, and the **conservation of natural areas** in the destination **can drive consideration**
- The **primary barrier** to travelling sustainably is **not having enough information** on how to do so and perceptions of it being **more expensive**



Indigenous Tourism

- **Canada is not perceived** as a destination to explore **Indigenous culture** – the top unaided destinations are **Australia** and **United States**
- Japanese travellers to Canada are most **interested in** adventuring in nature, **visiting museums** and **experiencing the food** but less curious about learning Indigenous ways of life, visiting remote indigenous communities, fishing, or learning about residential schools





Overall Travel Outlook & Trends

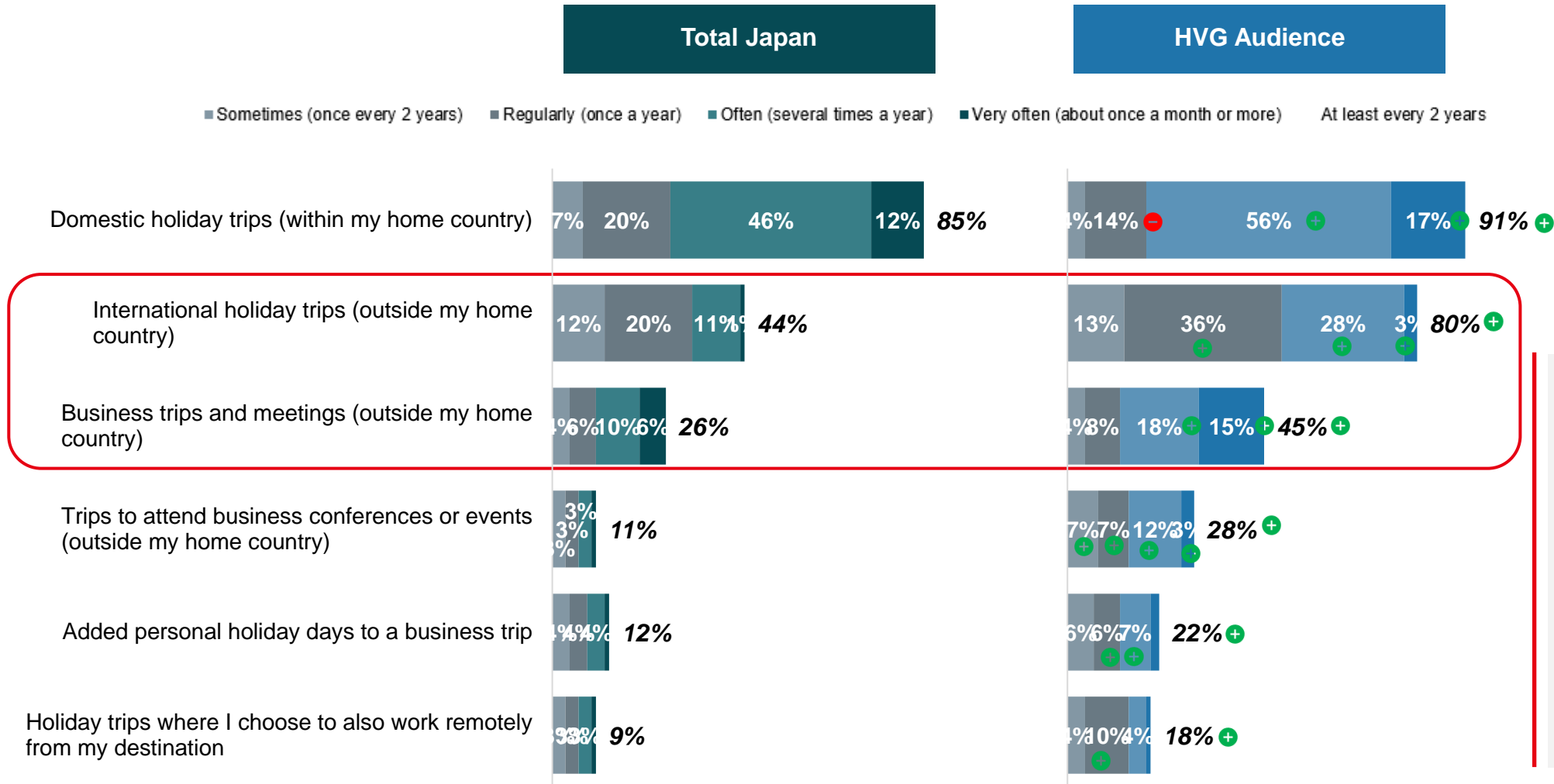


 Toronto
Ontario



Types of Travel Trips

Domestic holiday trips are taken nearly twice as frequently as international trips among total Japanese travellers. HVGs are more active, with high incidence for both domestic and international trips. However, adding personal holidays to business trips or opting to work remotely during holidays is not widely embraced by total Japanese travellers and HVGs.



TOTAL JAPAN
 Five times as many Japanese are planning to take a domestic vacation versus an international vacation (51% vs. 10%). And 58% say they like to take vacation in the country they live rather than abroad. That said, intentions for both vacation types have seen significant increases over the last 3 years.

YouGov Global Travel Profiles (Japan) – 2023 Base: Total Japanese 18+

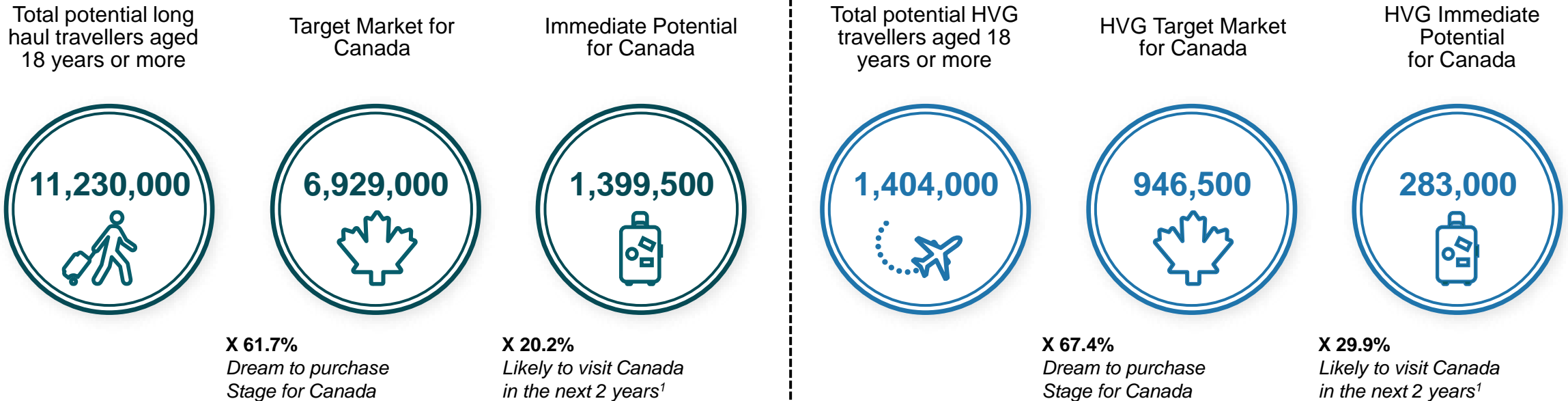
Overall Demand for Long-Haul Pleasure Travel



$$\begin{array}{ccccccc}
 \text{Total Population 18+} & & \text{Long-Haul Traveller} & & & & \\
 104,952,000 & \times & \text{Incidence Rate} & = & \boxed{\text{Size of Target Market}} & \times & \text{HVG} & = & \boxed{\text{Size of HVG Population}} \\
 & & 10.7\% & & 11,230,000 & & 12.5\% & & 1,404,000
 \end{array}$$



Potential Market Size



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)

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)

9 ¹ Includes respondents likely to visit Canada for a trip of 1 to 3 nights, or a trip of 4 nights or more.
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)

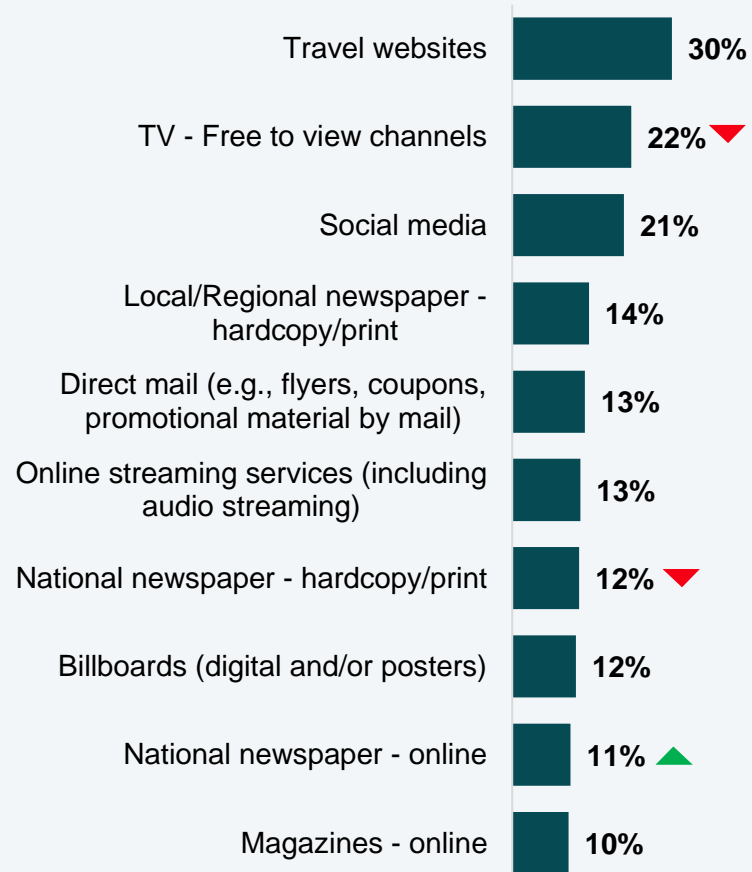


Effective Types of Travel Advertising*

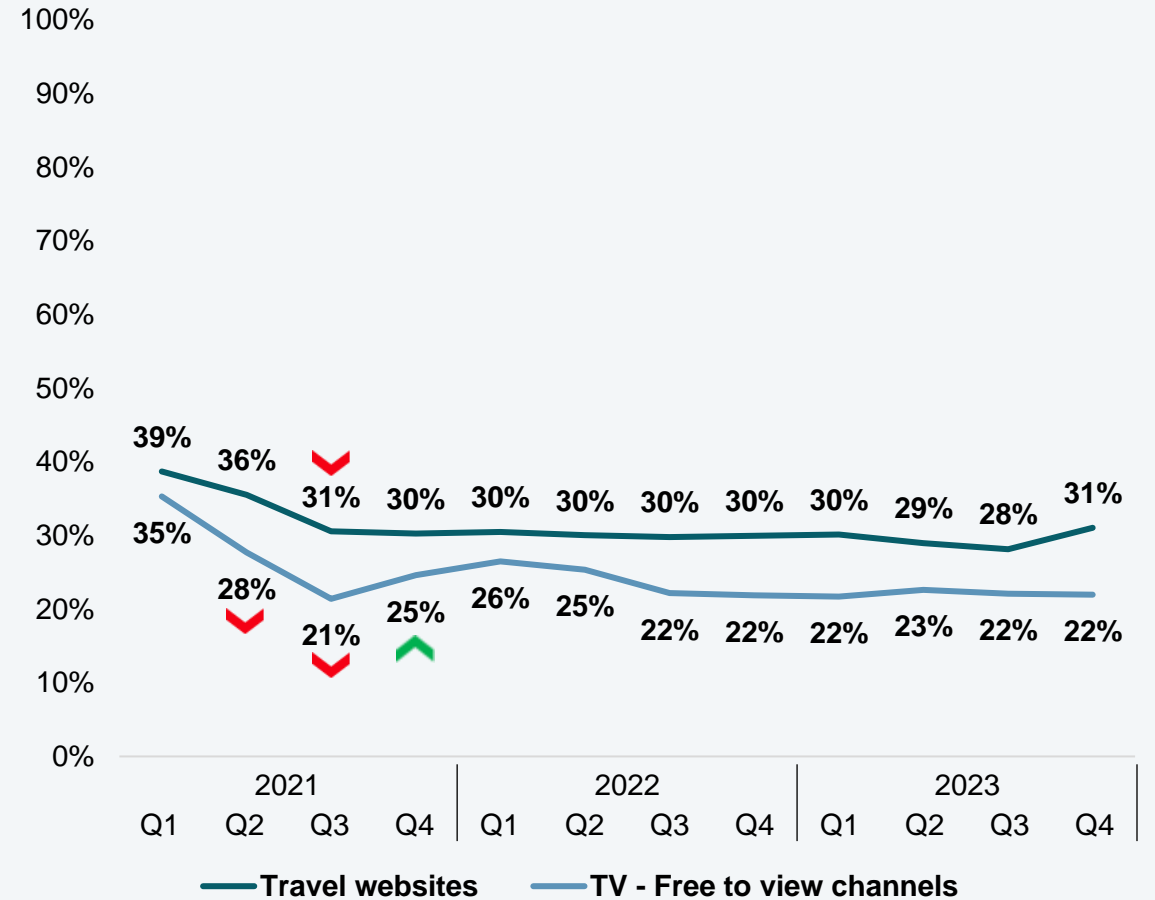


Travel websites are the top mentioned advertising channel for catching the attention of Japanese, followed by TV and social media; mentions of TV are down year-over-year.

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.

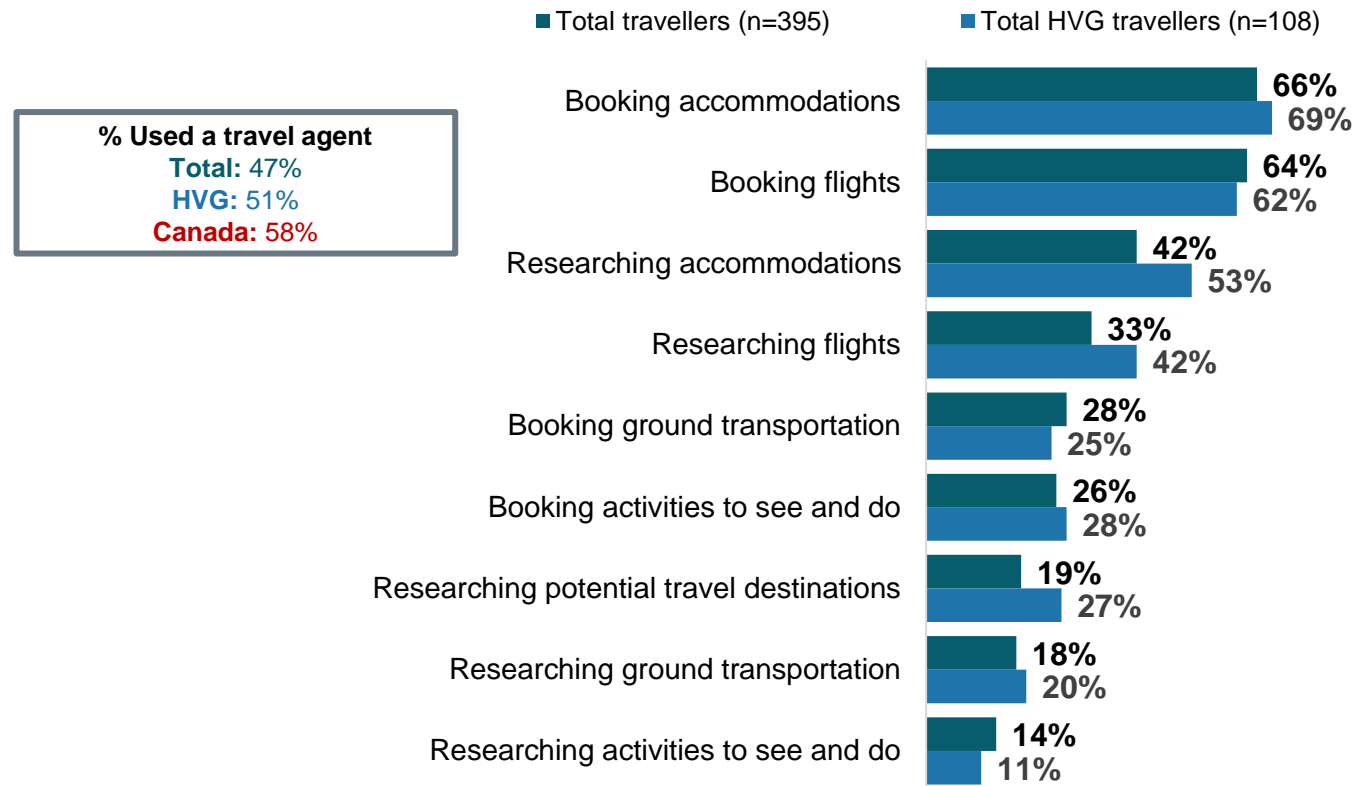


Travel Agents/Tour Operator Usage For Recent Trip



While travel agents/tour operators are primarily used to book accommodations and flights, two out of five Japanese travellers also use them for researching accommodations.

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)

Japan GTRP – April 2024

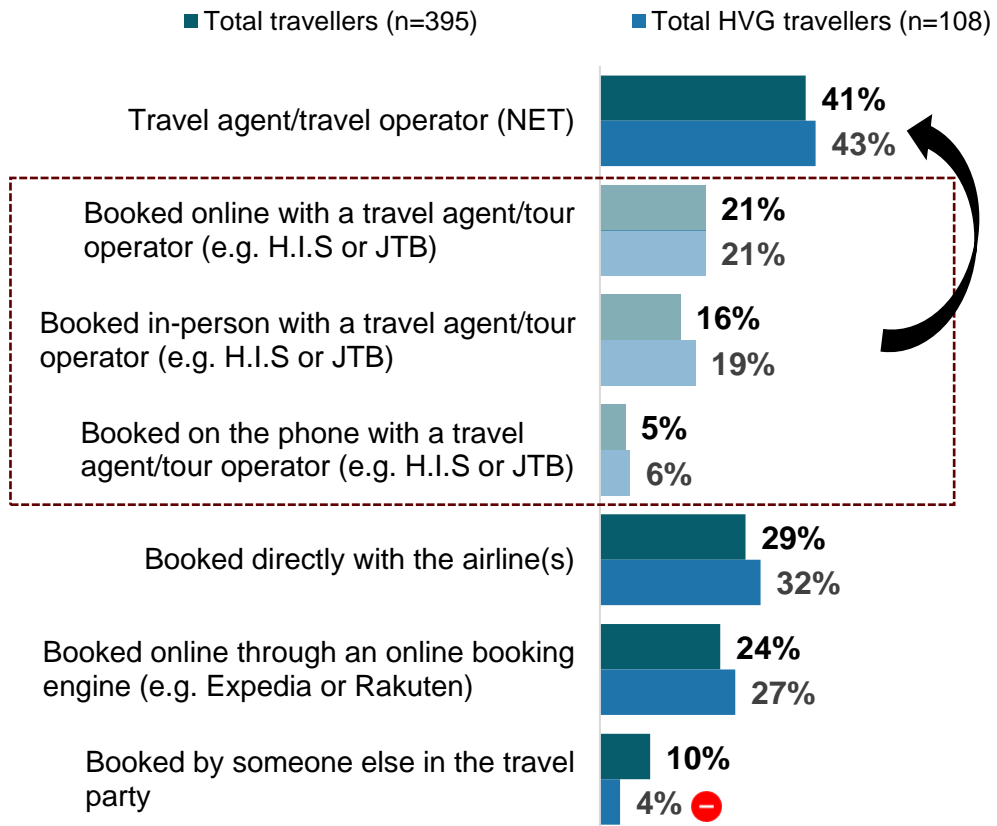


+ / - = significantly higher/lower result (vs. Total)

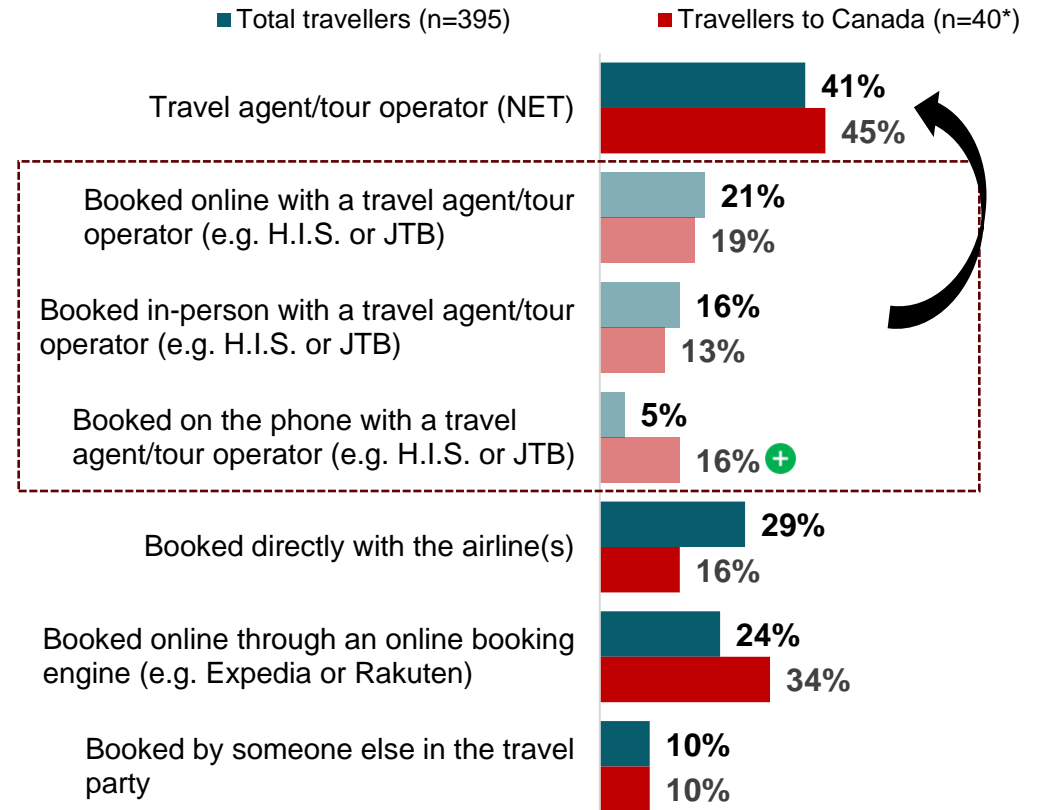
Booking Flights For Recent Trip

Japanese travellers are most likely to book flights with a travel agent/tour operator, followed by direct bookings via the airline.

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



Total Travellers to Any Destination vs. Total Travellers to Canada



12 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*)
 F12. How did you book your flight for this trip? (Select all that apply)
 *Small base size, interpret with caution (n<50)

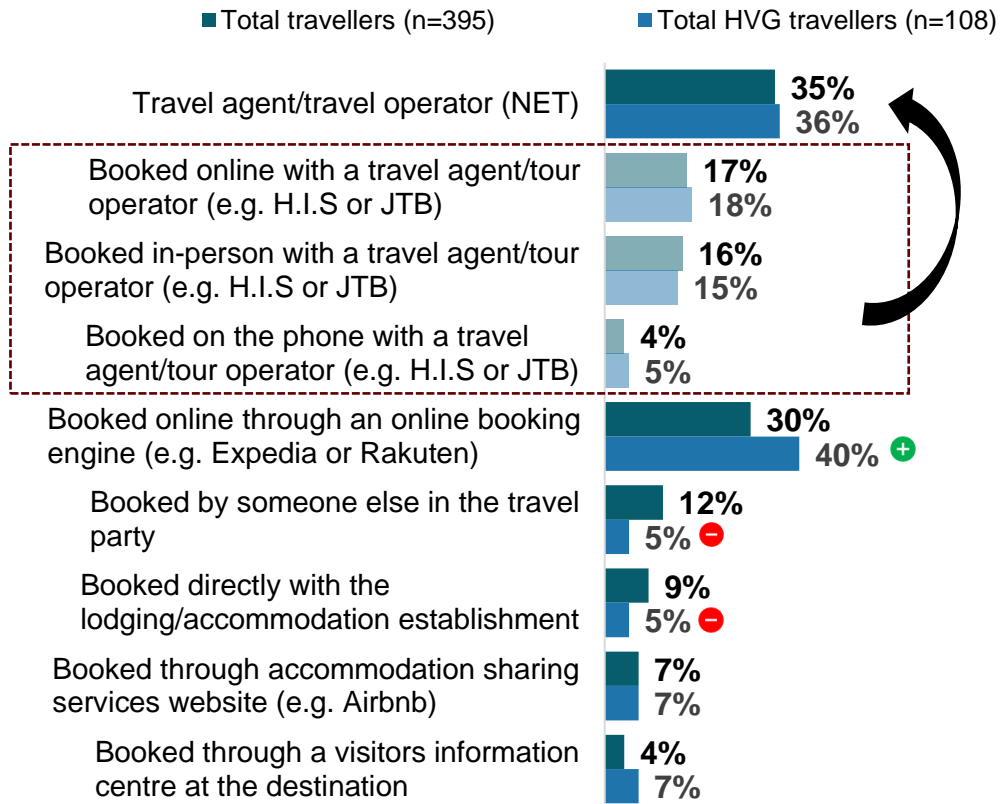


Booking Accommodations For Recent Trip

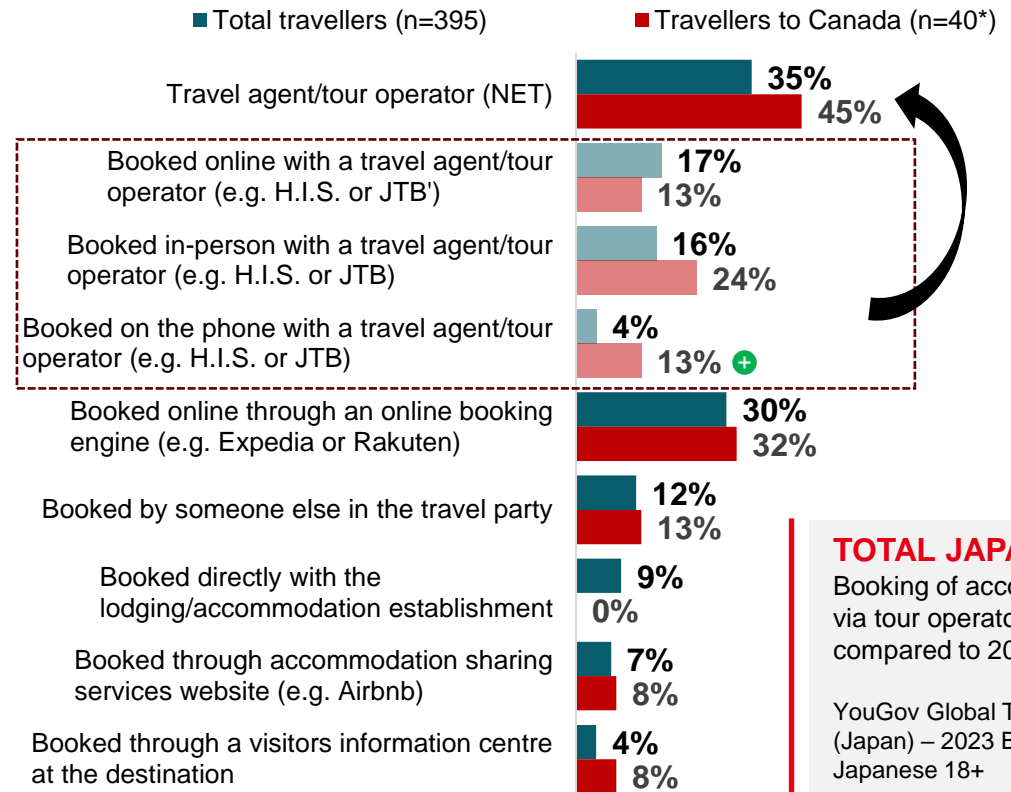


Booking accommodations through a travel agent/tour operator is most preferred by total Japanese travellers while HVGs favour booking online through a booking engine.

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



Total Travellers to Any Destination vs. Total Travellers to Canada



TOTAL JAPAN
 Booking of accommodations via tour operators decreased compared to 2022
 YouGov Global Travel Profiles (Japan) – 2023 Base: Total Japanese 18+

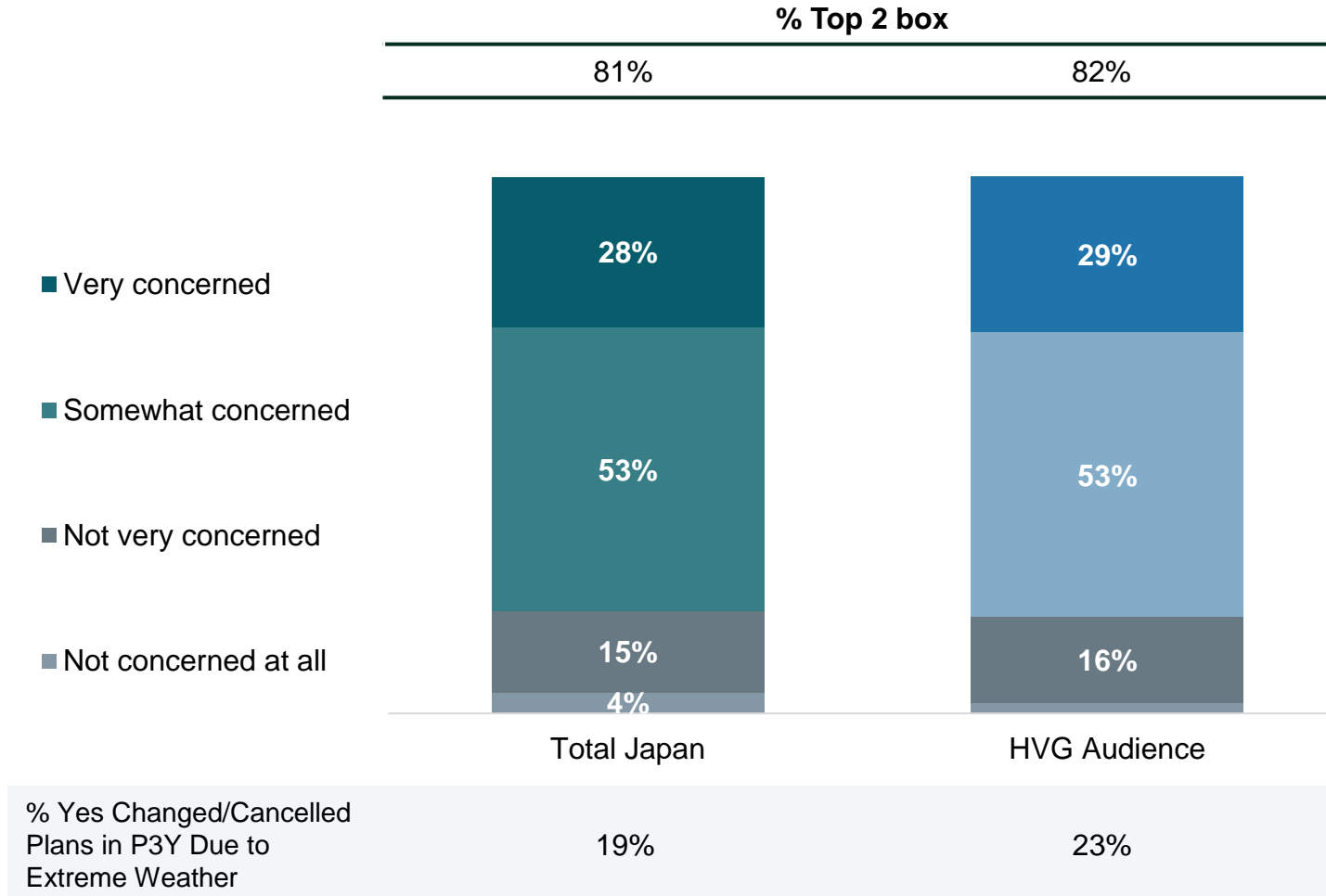
13 Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination (n=395); HVG (n=108); Travellers to Canada (n=40*)
 F13. How did you book your accommodation for this trip? (Select all that apply)
 *Small base size, interpret with caution (n<50)



Impact of Extreme Weather Events on Travel Plans



Eight in ten Japanese travellers have concerns about extreme weather events impacting travel plans, but only two in ten have had to change plans due to weather in the past three years.



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.

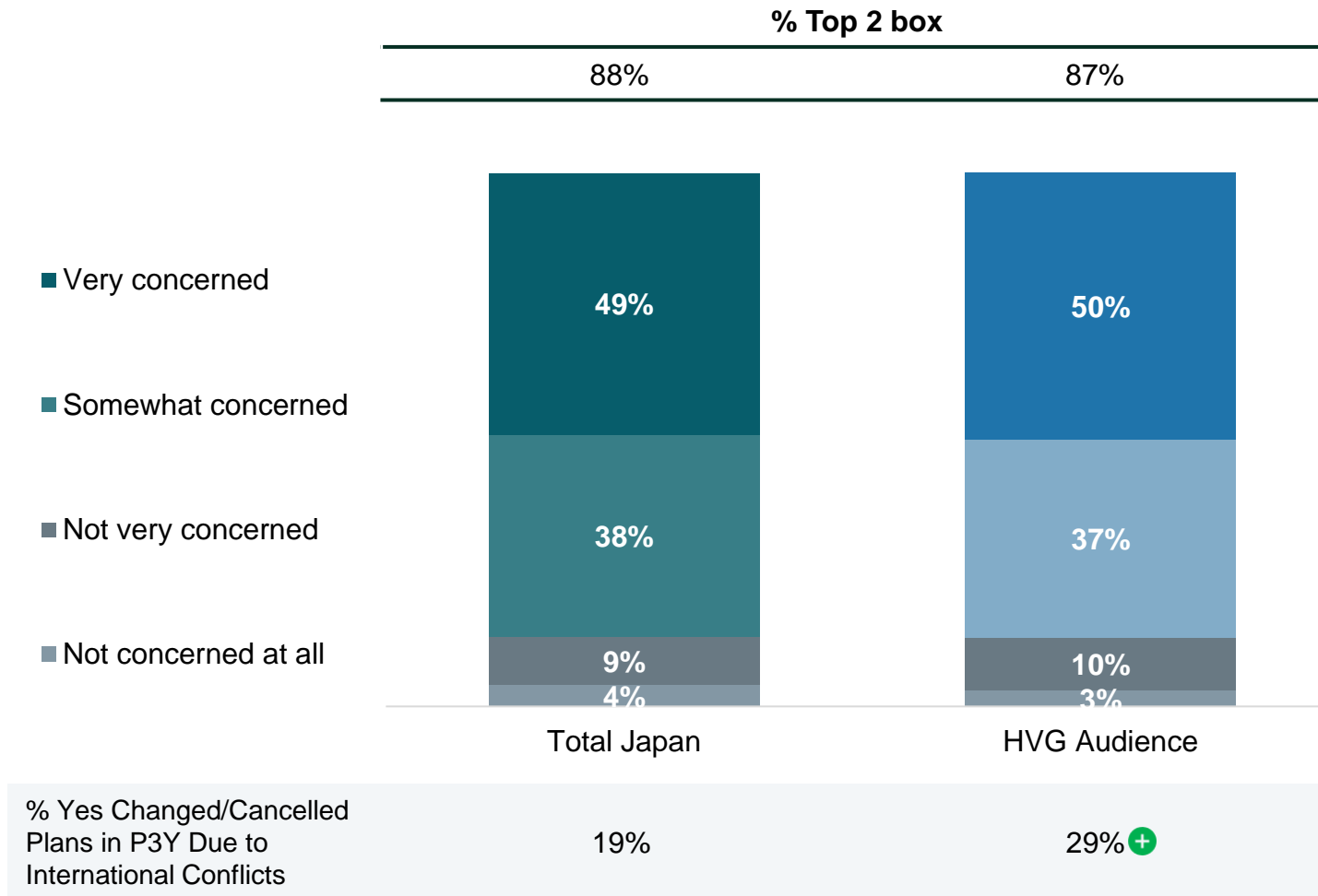
14 Note: respondents were asked either about extreme weather events (D10/D11) or international conflicts & unrest (D12/D13)
 Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=746); HVG (n=97)
 D10. [DESCRIPTION] How concerned are you about extreme weather events affecting your travel 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 are even more of a concern to Japanese travellers when it comes to making travel plans, especially HVGs, with nearly three in ten having had to alter their travel plans due to such conflicts.



International Conflicts Description


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





Canada vs. Competitive Destinations



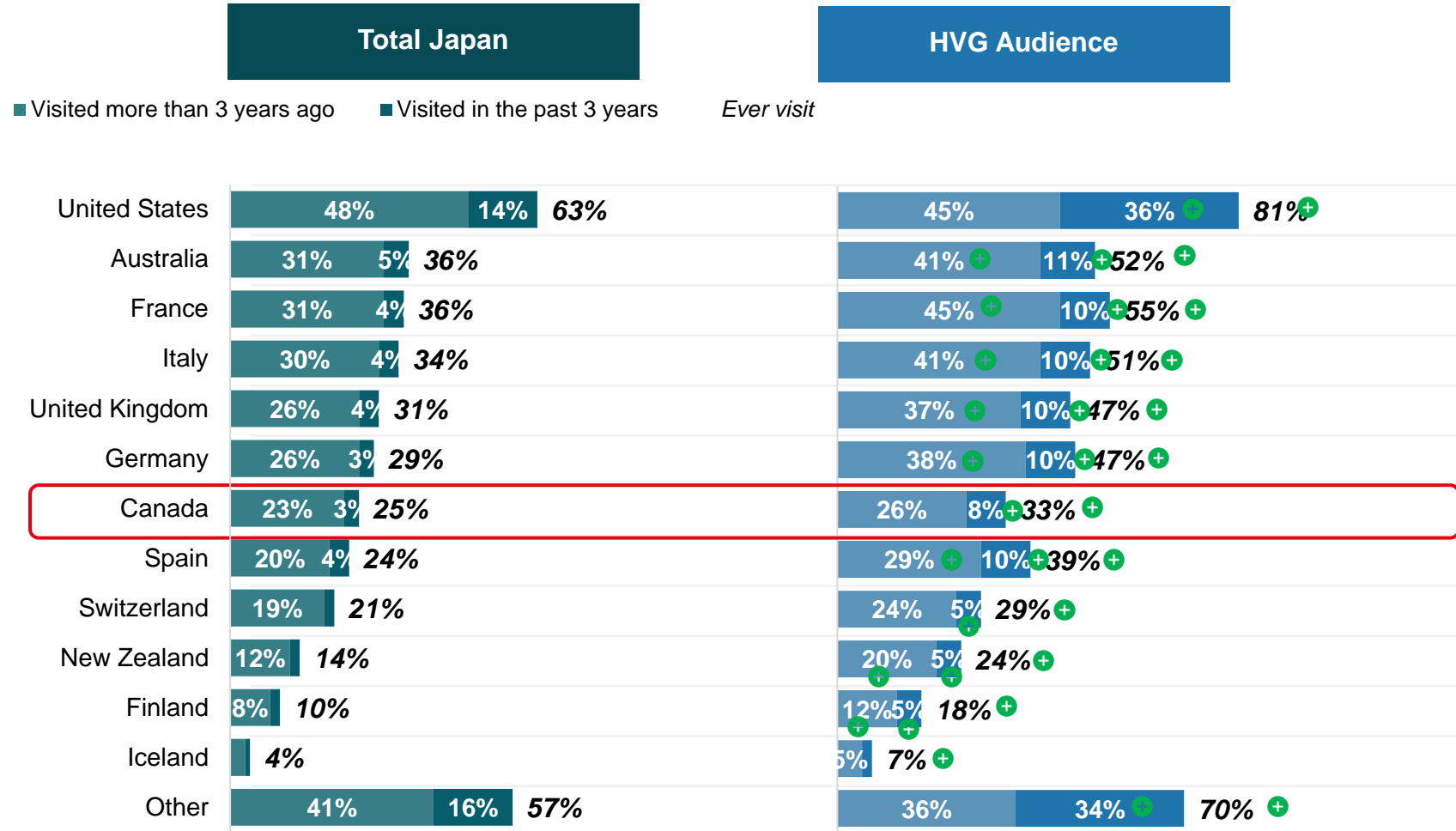
 Lunenburg
Nova Scotia



Past Visitation



Almost two thirds of Japanese travellers have ever been to the United States. While Canada ranks 7th among the competitive set for total Japanese travellers and 8th for HVGs in terms of past visits, visitation is higher among HVGs (33% vs. 25%).



Top Destinations Among Total Ever Visited Canada (n=378):

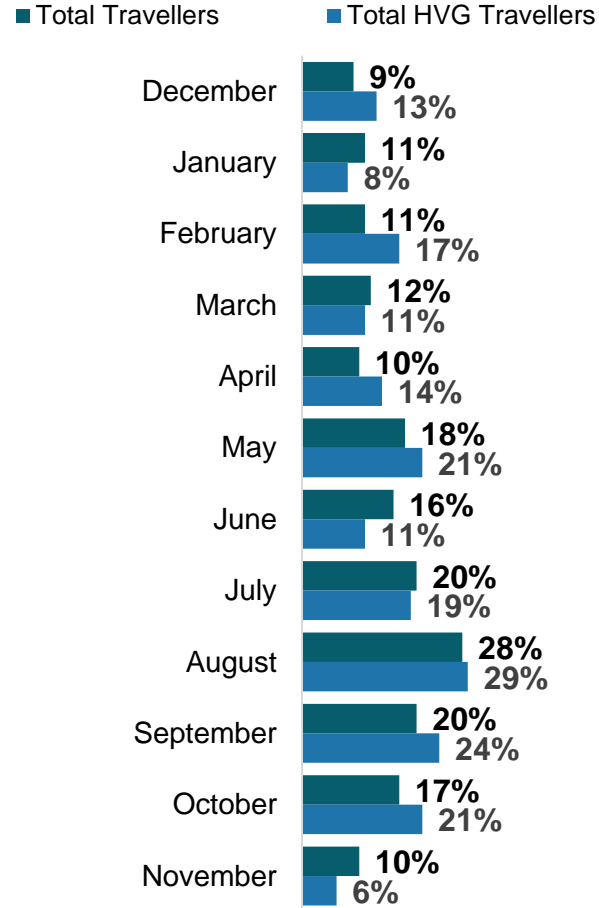
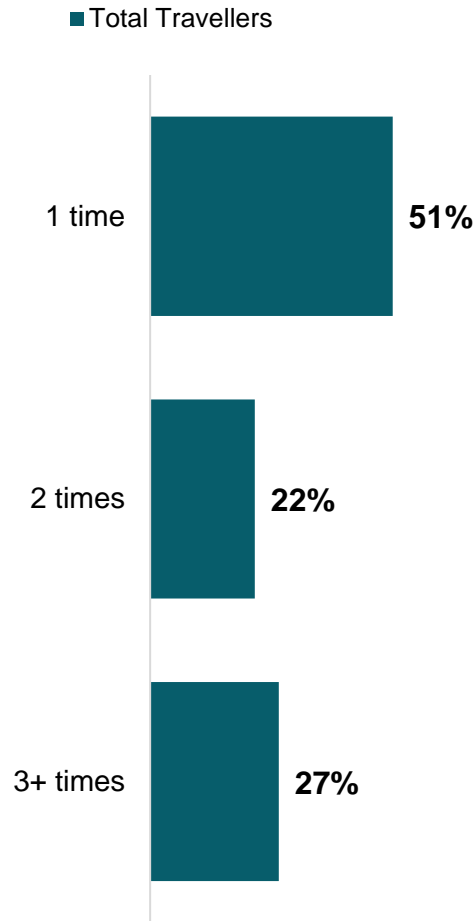
- US: 87%
- France: 63%
- Italy: 60%
- UK: 58%
- Australia: 57%



Number of Visits Ever & Time of Year Visited Canada



The majority (51%) of those who have ever visited Canada made just one trip, with Summer being the most popular season.



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

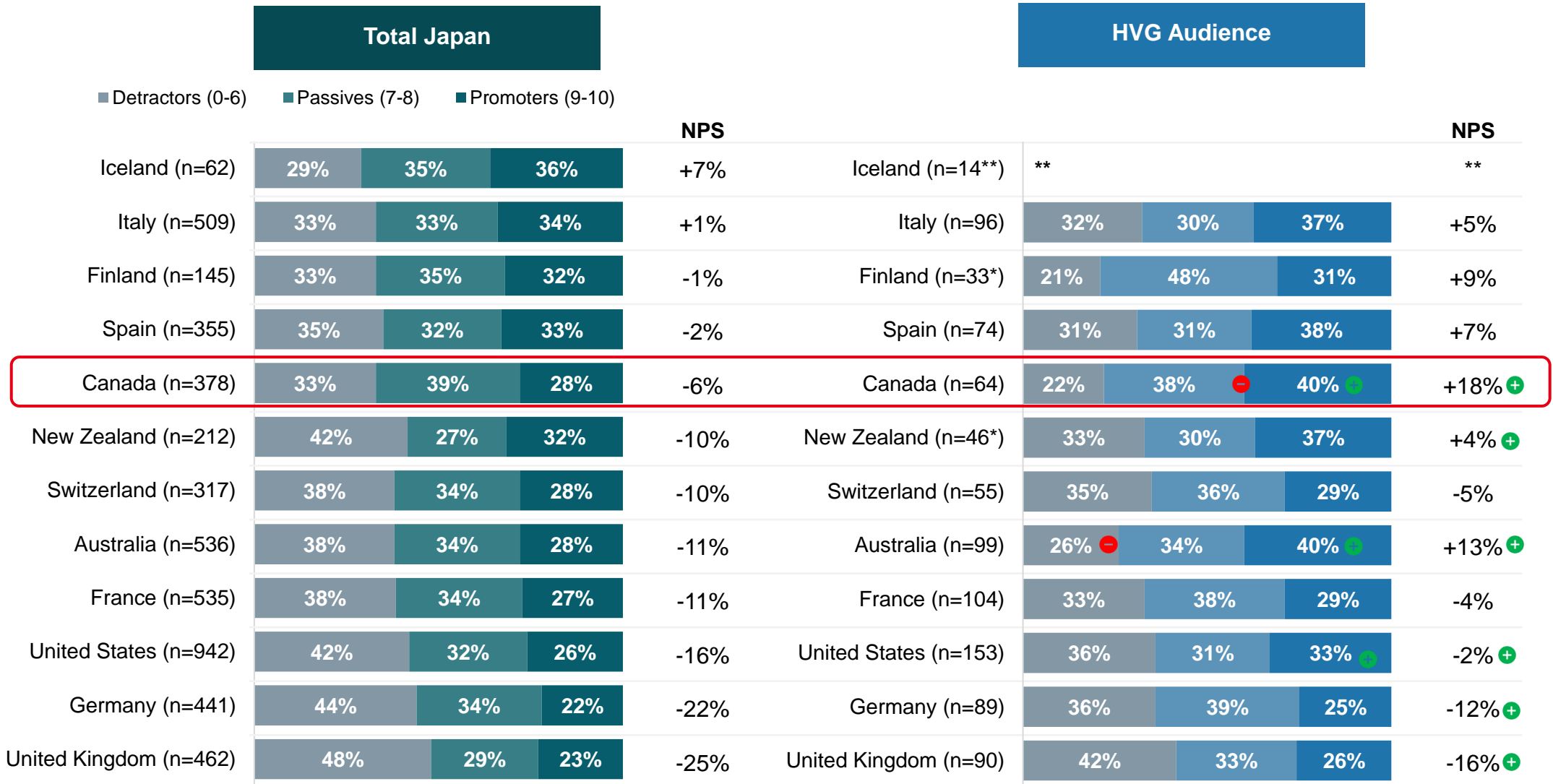
18 Base: Long-haul pleasure travellers (past 3 years or next 2 years)
 F19. Approximately, how many times have you been to Canada? Ever Visited Canada (excluding None) (n=370); HVG (n=63)
 F20. What time of year have you ever visited Canada? Select all that apply. Visited Canada (n=378); HVG (n=64)
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



Net Promoter Score (NPS)



Despite high levels of visitation to the US, its NPS score among those who have ever visited ranks among the lowest while Canada ranks 5th among total Japanese travellers and 1st among HVGs.



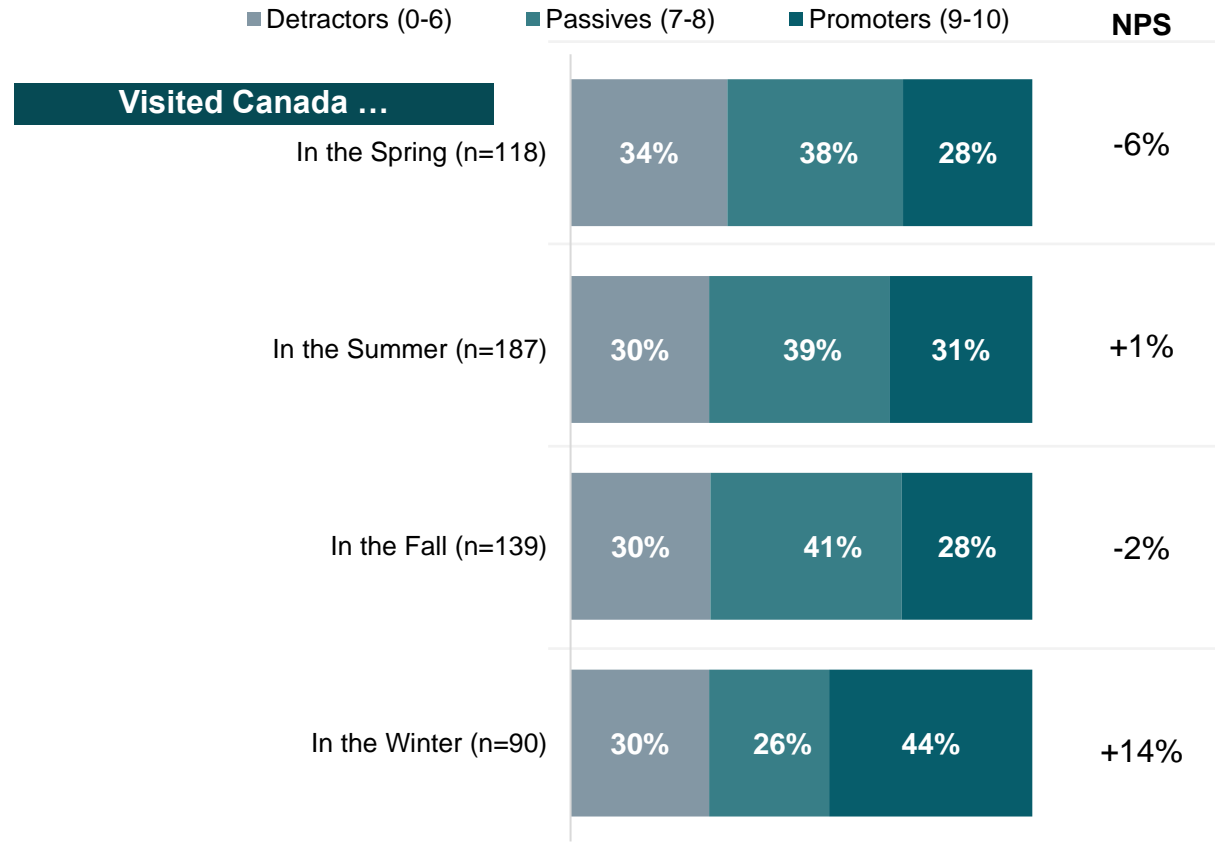
Note: all respondents evaluated countries they have ever visited from the competitive set.
 Base: Long-haul pleasure travellers (past 3 years or next 2 years), Visited [DESTINATION]
 C8. How likely are you to recommend each of the following holiday destinations to a friend, family member or colleague?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



Canada Net Promoter Score (NPS) by Season



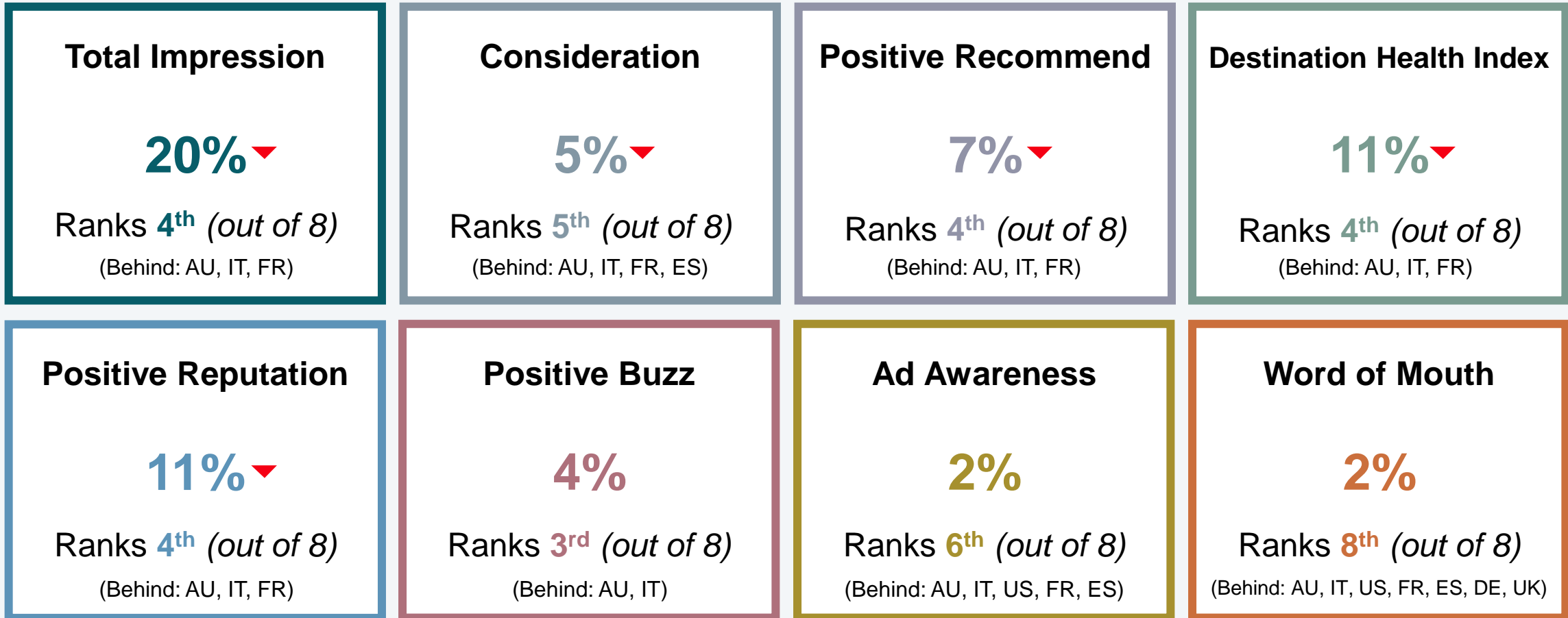
Canada's NPS is the highest among those who have visited the country in the Winter and negative amongst those who visited in the Spring and Fall.



Performance Scorecard for Canada



Among Total Japanese, 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. Australia and Italy rank in the top three for all metrics.



TOTAL Japan

Competitive set: Australia, Italy, France, Spain, Germany, UK, US

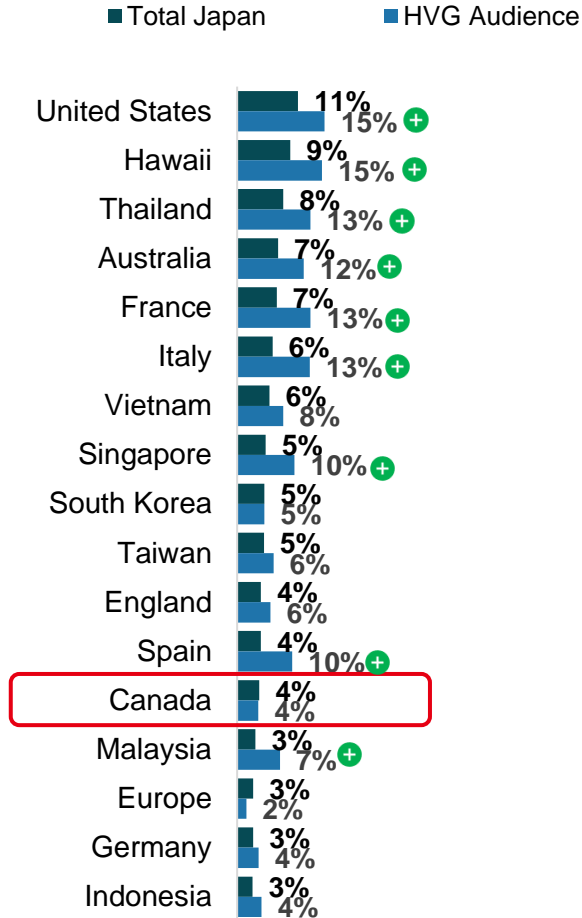


Unaided Long-Haul Destination Consideration (Next 2 Years)

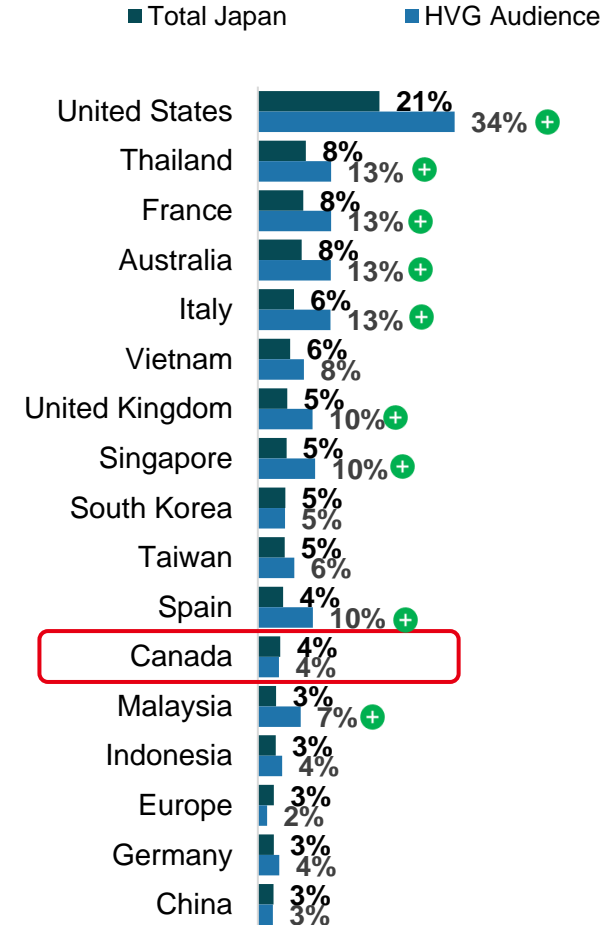


On an unaided basis, the US leads in long-haul destination consideration, while all other countries, including Canada, receive single-digit mentions. Canada ranks relatively low among all destinations for both total Japanese travellers and HVGs.

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)

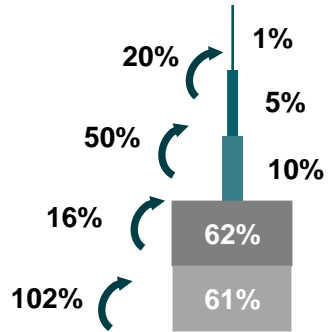


Consideration Funnels: Total Japan Travellers

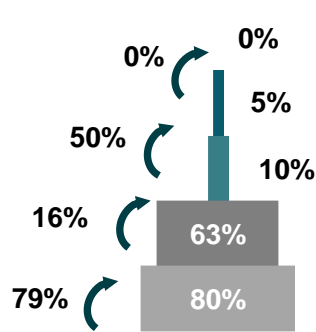
Travellers in Japan do not have a destination they are committed to and their consideration is also soft across all destinations in the competitive set.



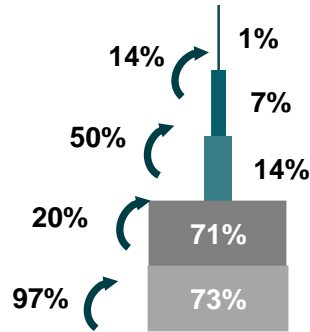
Canada



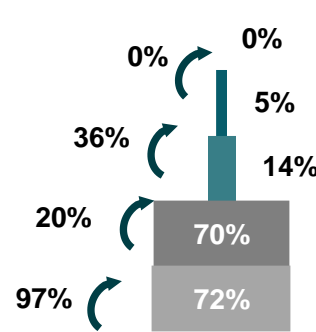
United States



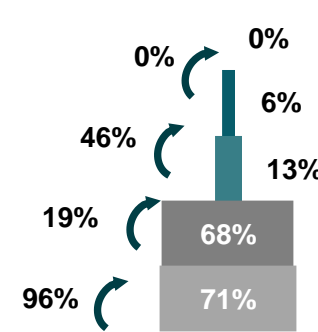
Italy



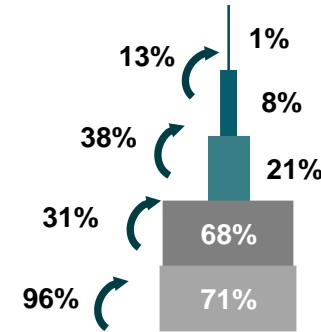
France



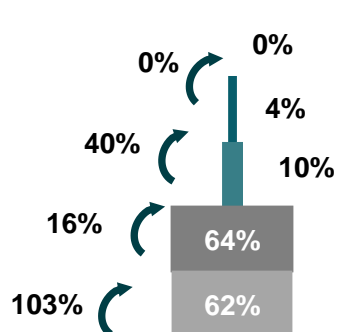
Australia



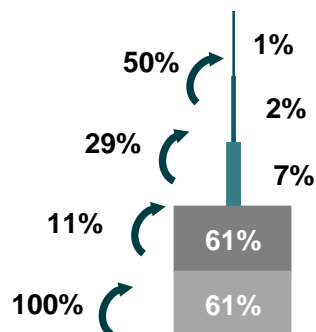
United Kingdom



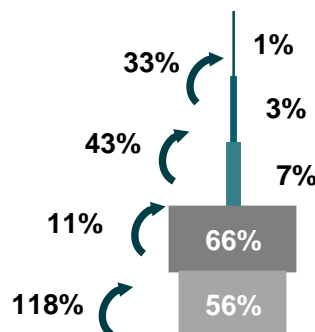
Spain



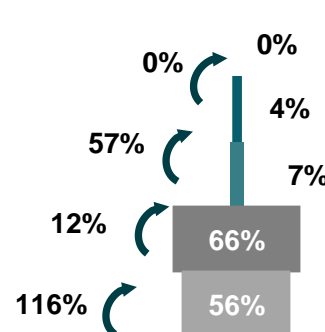
Germany



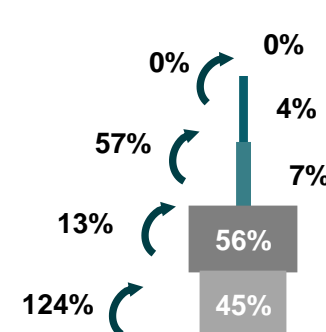
Switzerland



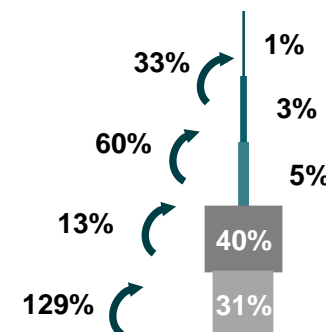
New Zealand



Finland

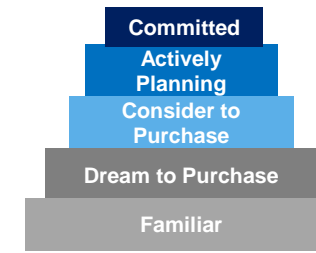


Iceland

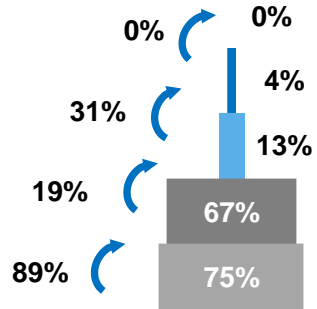


Consideration Funnels: Amongst HVG Audience

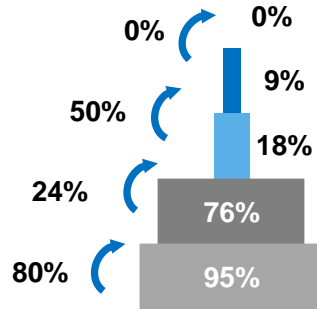
Amongst the HVG audience, there is a higher level of consideration for most destinations, most notably UK, France, Italy and Australia. Canada's dream-to-purchase to consideration conversion is comparatively low, worth further looking into.



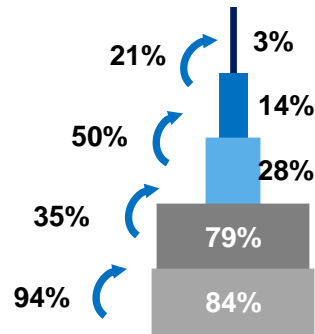
Canada



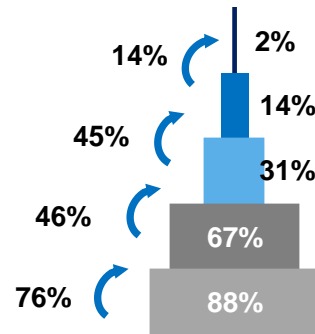
United States



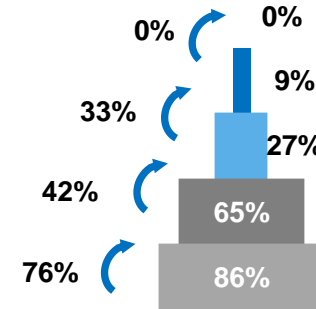
Italy



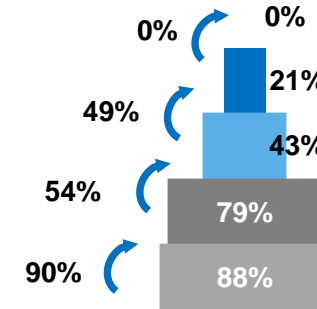
France



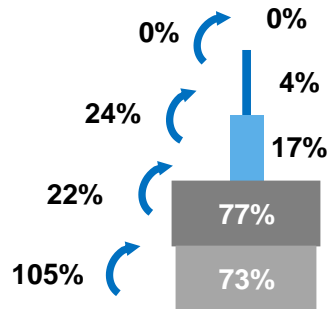
Australia



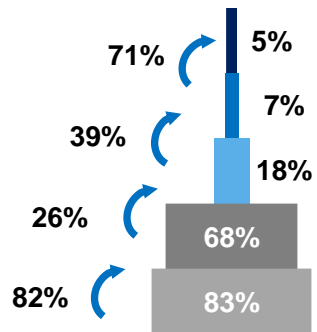
United Kingdom



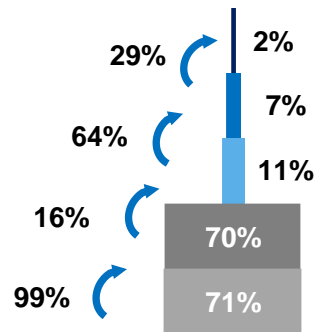
Spain



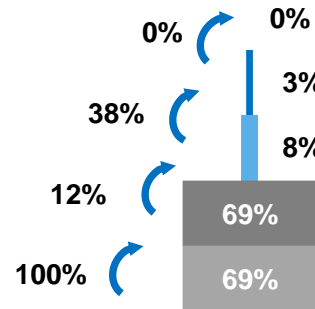
Germany



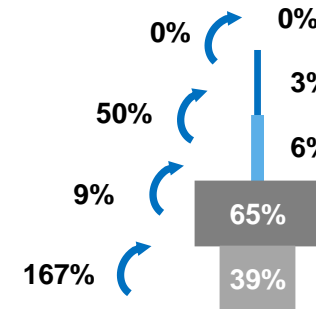
Switzerland



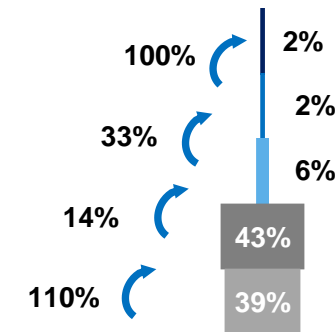
New Zealand



Finland



Iceland



Destination Consideration By Seasons



Japanese travellers are most interested in visiting Canada in the Summer and least interested in visiting during the Winter. Looking at travel during the Fall season, Canada is among the top choices only behind Germany.

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% +

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)

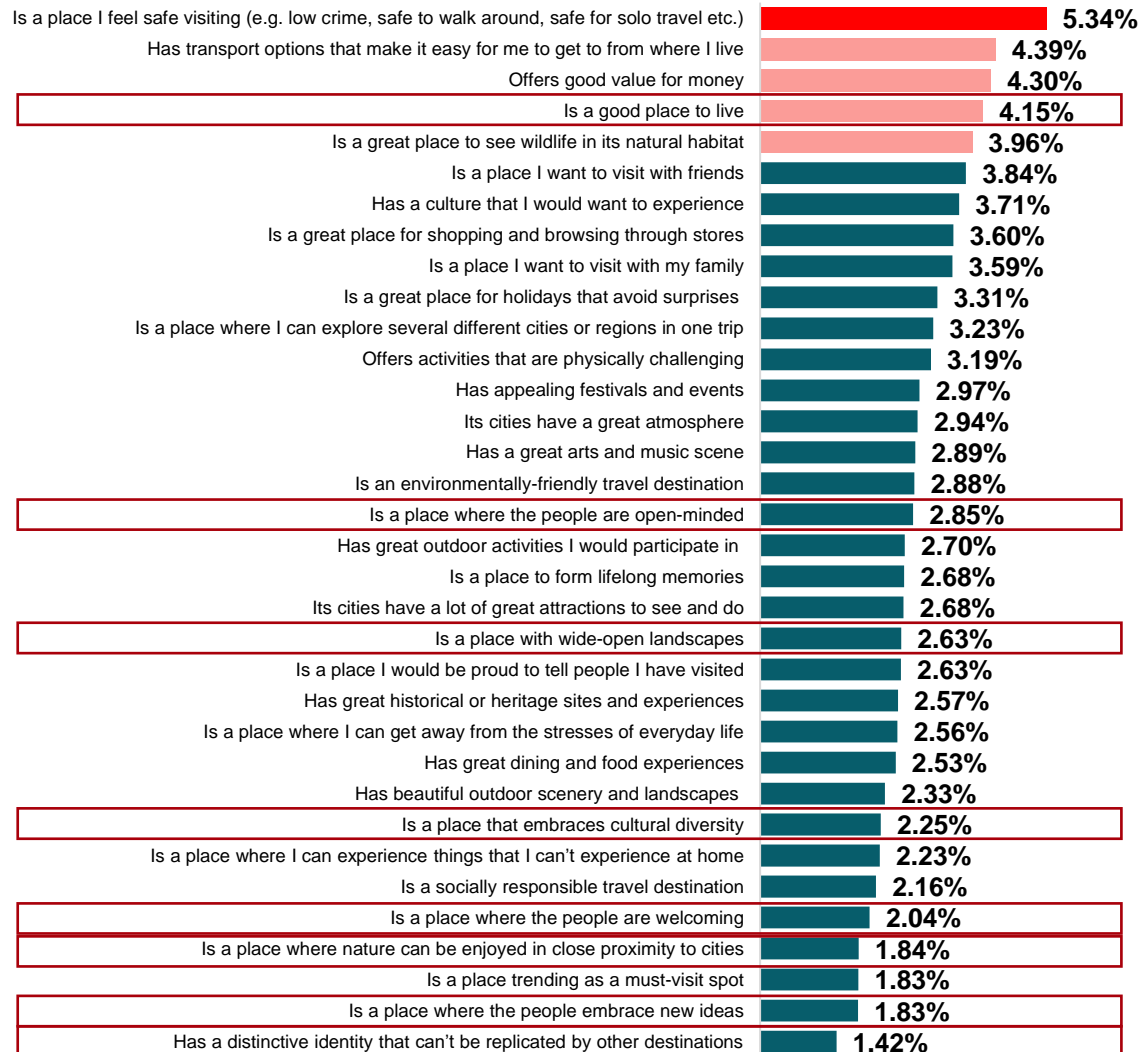


Destination Attributes: Drivers Analysis



The most influential attribute for consideration of holiday destinations is: a place I feel safe visiting. Secondary drivers encompass easy transport options, offers good value for money, is a good place to live and a great place to see wildlife.

= 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%.



Destination Attributes – Relative Strengths & Weaknesses: Among Total Japan



Canada stands out as being a safe place to visit, environmentally-friendly, offering physically challenging and great outdoor activities, and being a great place to see wildlife. There are several dimensions representing white space including offering good value for money, an important consideration driver.

		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	
To-Do	Is a place trending as a must-visit spot				Strength			Strength					
	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			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		Weakness	Weakness	Strength	Weakness		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			

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 Total Japan



Among the brand value statements, Canada performs well on: being a place with wide-open landscapes, allows one to enjoy nature close to cities, and a good place to live. Of note, Canada has a weakness in having a distinctive identity.

	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

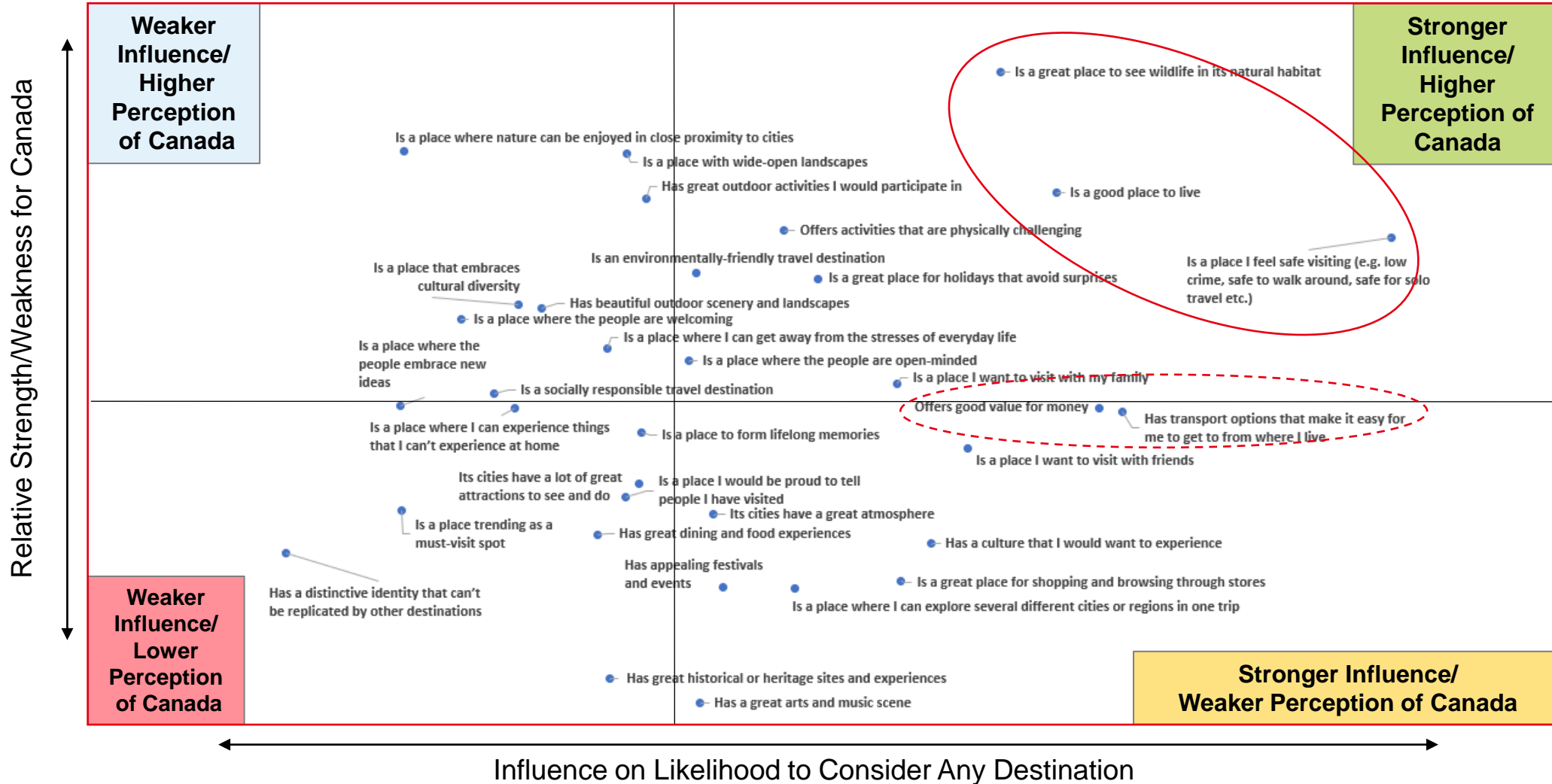
Note: all respondents evaluated Canada plus 3 randomly selected countries from the competitive set. Base: Long-haul pleasure travellers (past 3 years or next 2 years), Evaluated [DESTINATION] C6. We are interested in your general impressions about destinations even if you have never been there. Please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



Japan Strengths & Opportunities: Among Total Audience



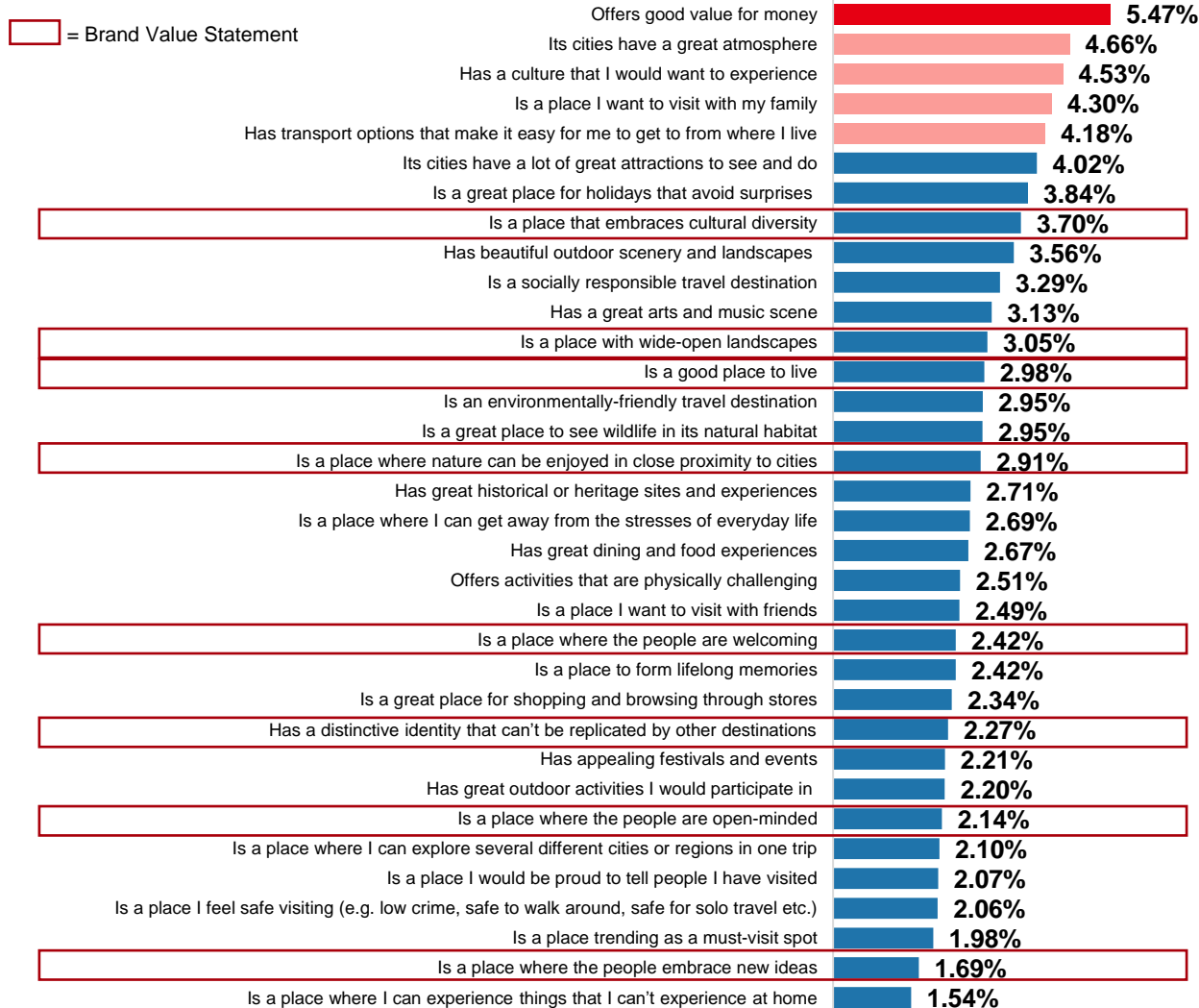
Canada can continue to leverage its strengths in being a place I feel safe visiting, a good place to live and to see wildlife to drive consideration. Improvement in secondary drivers such as having transport options that make it easy for me to get to from where I live, and offering good value for money can also further enhance consideration.



Destination Attributes: Drivers Analysis: Among HVG Audience



Amongst the HVG audience, the top drivers of destination consideration is offering good value for money. Having a great atmosphere, a culture I want to experience, visiting with family and transport options to get to from where I live are identified as secondary drivers.



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 – Relative Strengths & Weaknesses : Among HVG Audience



Among HVGs, Canada stands out as being a safe place to visit, a great place for holidays that avoid surprises, environmentally-friendly, offering physically challenging and great outdoor activities, and being a great place to see wildlife. Visiting with family represents a white space as no destination dominates them.

		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
	Has transport options that make it easy for me to get to from where I live		Strength	Weakness			Weakness	Weakness	Weakness			Strength	
Type of Trip	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	Weakness	Strength	Strength
	Has great outdoor activities I would participate in	Strength	Strength		Weakness	Weakness	Strength	Weakness	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	Weakness	Strength	Strength
To-See	Has appealing festivals and events	Weakness		Weakness	Strength	Strength	Weakness	Strength	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

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: Among HVG Audience



Among HVGs, Canada stands out as being a place with wide-open landscapes, where nature can be enjoyed in close proximity to cities, and a good place to live. Similar to total Japanese travellers, Canada has a weakness in having a distinctive identity.

	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.

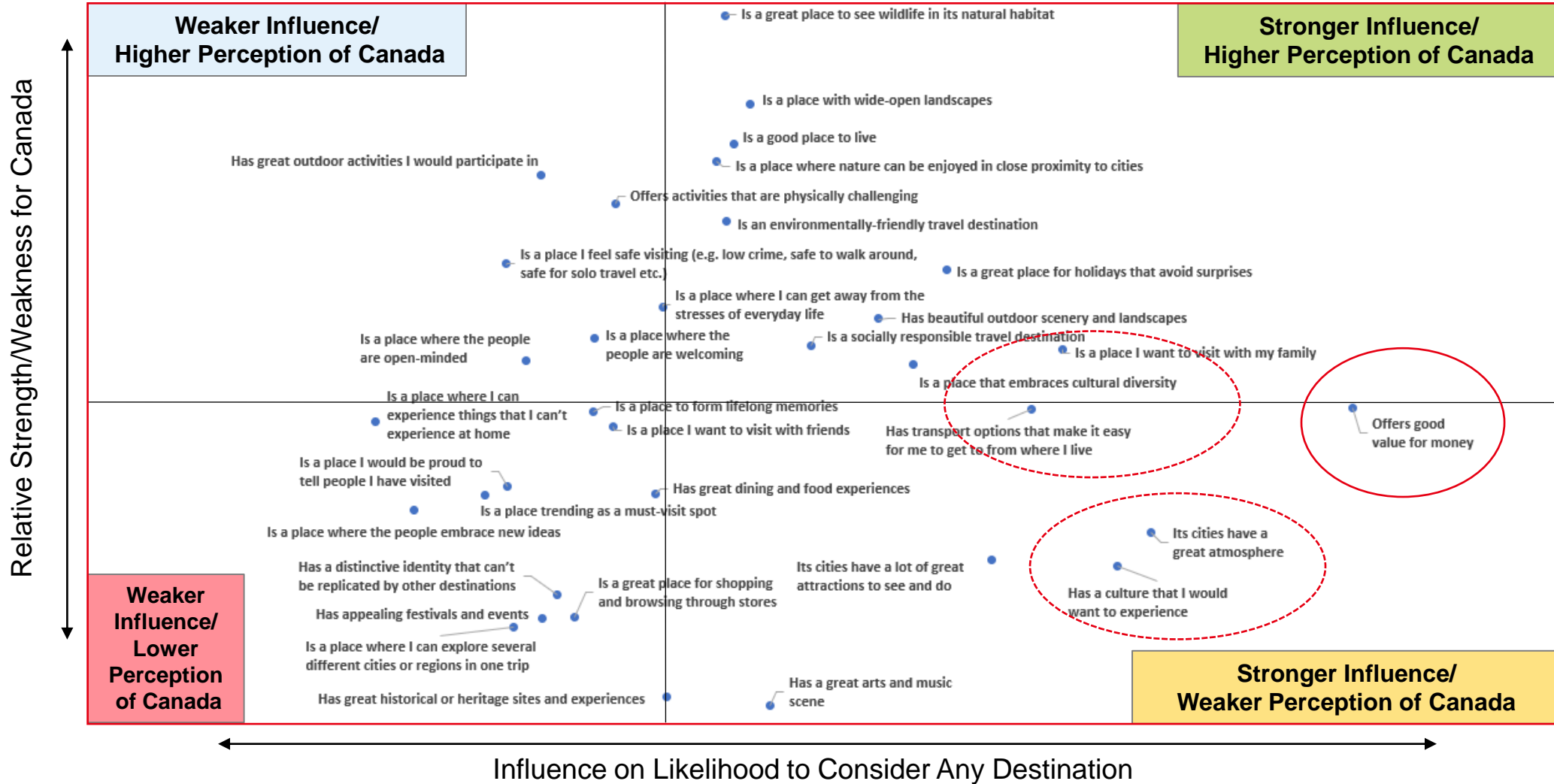
*Small base size, interpret with caution (n<50)



Japan Strengths & Opportunities: Among HVG Audience



Improving value for money perceptions may be an opportunity to improve consideration. Cities having a great atmosphere, a culture that I would want to experience, visiting with family and friends and has transport options that make it easy for me to get to from where I live can be considered as secondary priorities.





Increasing Fall/Winter Visitation

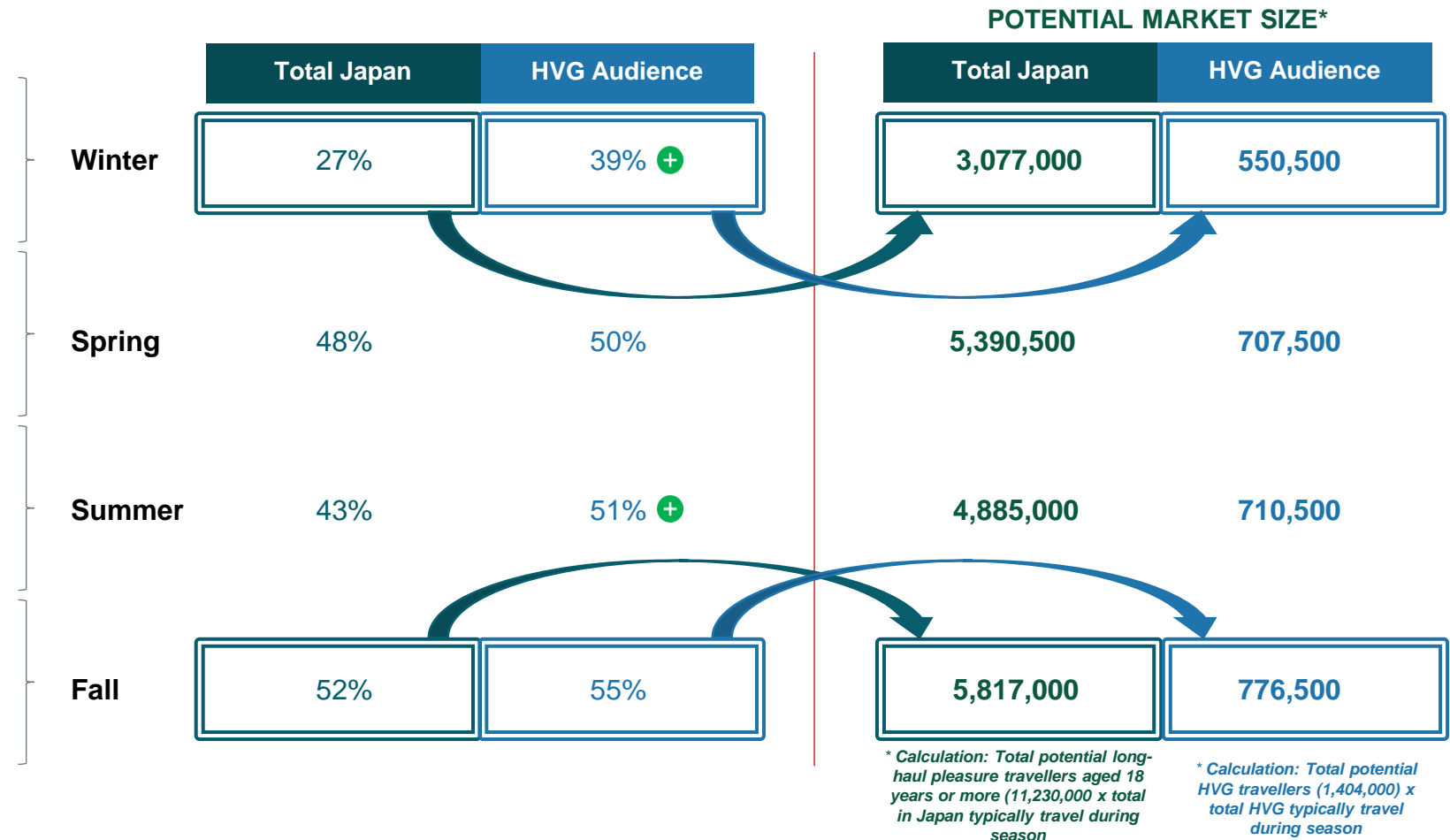
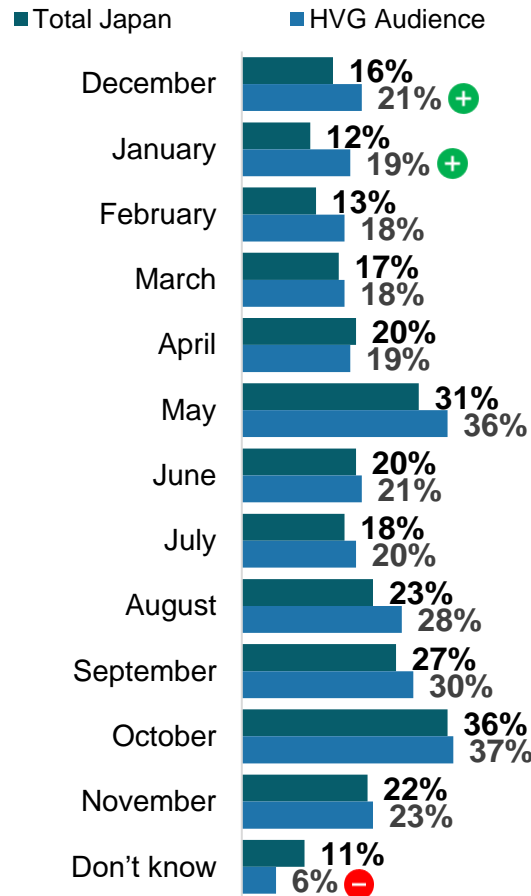


Aurora Borealis, Yellowknife
Northwest Territories



Demand by Season (Any Destination)

Demand for travel (any destination) is highest in Spring and Fall, followed by Summer. Demand is considerably lower in the Winter.



Interest in Fall/Winter Holidays



There is stronger interest in travelling to a destination during its Fall season than Winter, even among the HVG audience. Appetite for Winter holidays is only half of that for Fall.

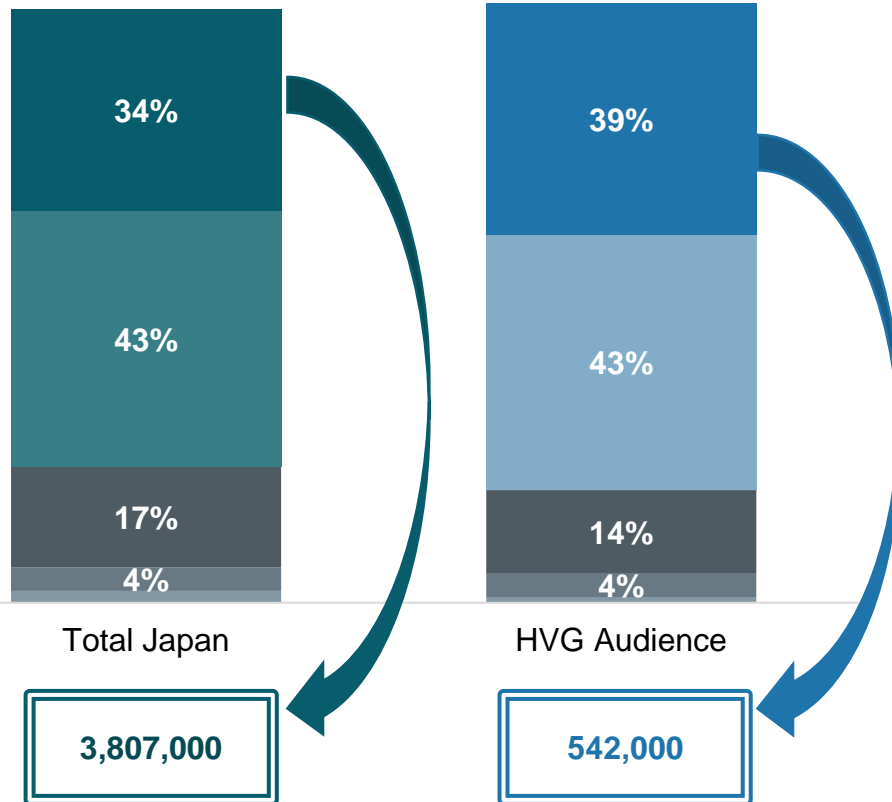
Fall

% Extremely/somewhat interested (top 2 box)

77%

81%

- Extremely interested
- Somewhat interested
- Neutral
- Not very interested
- Not at all interested



* Calculation: Total potential long-haul pleasure travellers aged 18 years or more (11,230,000 x total in Japan extremely interested in season)

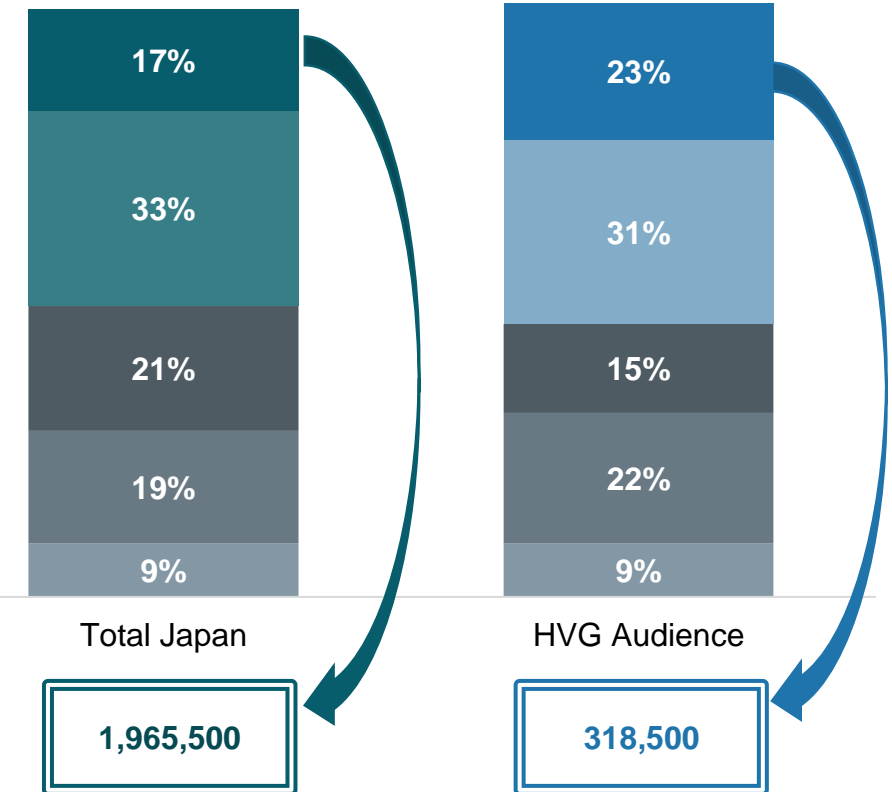
* Calculation: Total potential HVG travellers (1,404,000) x total HVG extremely interested in season

Winter

% Extremely/somewhat interested (top 2 box)

51%

54%



Top of Mind Fall/Winter Destinations



Japanese travellers appear most likely to think of travelling within Japan to experience both the Fall and Winter seasons. Comparatively, Canada ranks behind the US for Fall but ahead of US for Winter, particularly among HVGs who consider Canada their top destination.

Fall

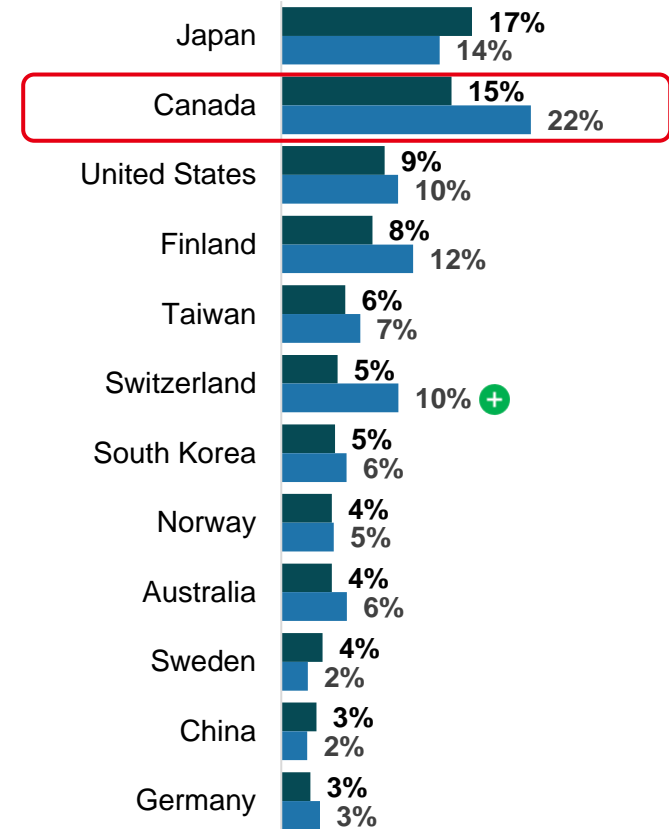
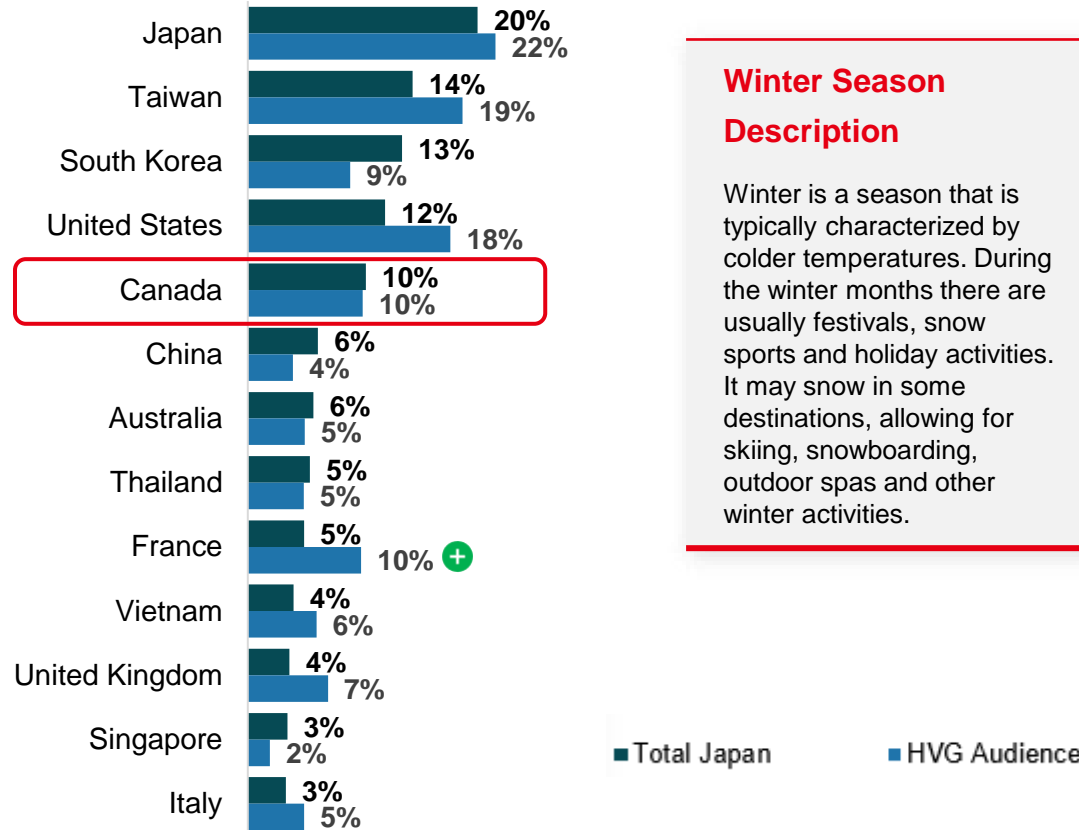
Winter

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.

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) Winter: (n=752); HVG (n=88); Fall: (n=749); HVG (n=101)

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.

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.



Potential Market Size For Canada in Fall/Winter

The Canadian market potential is 2 times greater in Fall than Winter for total Japanese travellers.

Total potential travellers aged 18 years or more

Target Market for Canada

Size of the target market

Consideration for Canada in [SEASON] in N2Y

Immediate potential for Canada in N2Y

Long haul pleasure travellers

Those in the dream to purchase stages of the path to purchase for Canada

11,230,000

X

61.7%

=

6,929,000

X

Fall: 29.8%

=

Fall: 2,065,000



Winter: 14.8%

Winter: 1,025,500



HVG travellers

1,404,000

X

67.4%

=

946,500

X

Fall: 29.9%

=

Fall: 283,000



Winter: 18.0%

Winter: 170,500



Fall/Winter Conversion – Total Japan



The conversion between those who typically travel during the Fall and Winter months and interest in taking a trip during a destination's Fall and Winter season is about two thirds. Canada has the potential to convert half of those highly interested in traveling to any destination during the Fall and Winter seasons.



Fall

Demand During Fall Months
(any destination)

5,817,000

65%

Extremely Interested in
Visiting a Destination
During its Fall Season
(any destination)

3,807,000

54%

Next 2 Year Immediate
Potential for CANADA
During Fall Season

2,065,000



Winter

Demand During Winter Months
(any destination)

3,077,000

64%

Extremely Interested in
Visiting a Destination
During its Winter Season
(any destination)

1,965,500

52%

Next 2 Year Immediate
Potential for CANADA
During Winter Season

1,025,500

Base: Long haul pleasure travellers (past 3 years or next 2 years)
 D1. In general, what time of year do you typically like to take holiday trips? Select all that apply Total (n=1501)
 D3. In general, how interested are you in taking a holiday trip to a destination during its autumn season? Total (n=749)
 D2. In general, how interested are you in taking a holiday trip to a destination during its winter season? Total (n=752)
 C7. For each of the following destinations, during which months would you consider taking a long haul trip in the next two years? Total (n=926)



Fall/Winter Conversion – Total HVG



Among HVGs, conversion between those who typically travel during the Fall months and interest in taking a trip in the Fall season is higher than those who typically travel during the Winter months and interest in taking a trip in the Winter season. Canada also has the potential to convert half of those highly interested in traveling to any destination during the Fall and Winter seasons.



Fall

Demand During Fall Months
(any destination)

776,500

70%

Extremely Interested in
Visiting a Destination
During its Fall Season
(any destination)

542,000

52%

Next 2 Year Immediate
Potential for CANADA
During Fall Season

283,000



Winter

Demand During Winter Months
(any destination)

550,500

58%

Extremely Interested in
Visiting a Destination
During its Winter Season
(any destination)

318,500

54%

Next 2 Year Immediate
Potential for CANADA
During Winter Season

170,500

Base: Long haul pleasure travellers (past 3 years or next 2 years), HVG Audience

D1. In general, what time of year do you typically like to take holiday trips? Select all that apply Total (n=189)

D3. In general, how interested are you in taking a holiday trip to a destination during its autumn season? Total (n=101)

D2. In general, how interested are you in taking a holiday trip to a destination during its winter season? Total (n=88)

C7. For each of the following destinations, during which months would you consider taking a long haul trip in the next two years? Total (n=128)

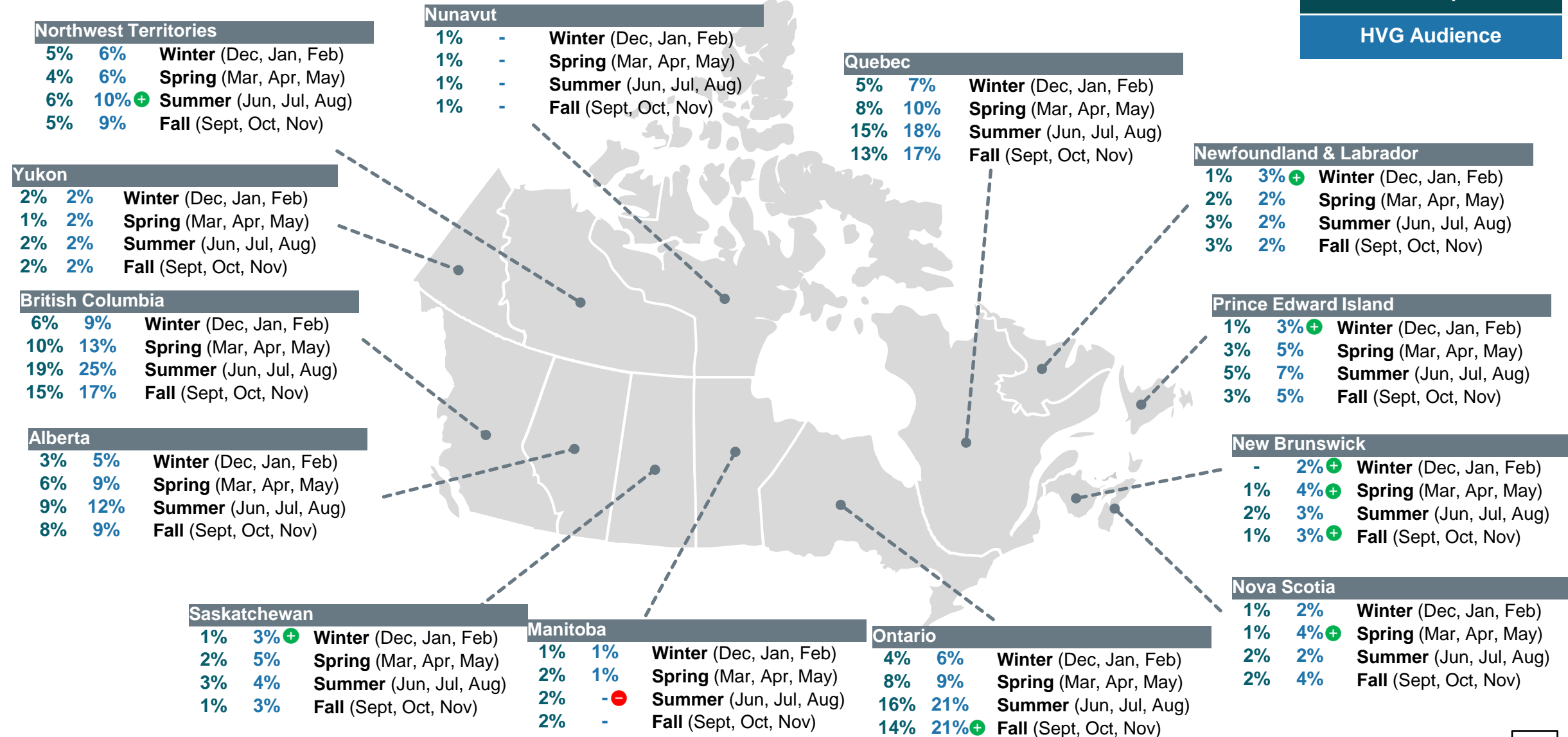


Time of Year Interested in Visiting Canada (Next 2 Years)



British Columbia, Ontario and Quebec are the top Canadian provinces for Summer and Fall travel.

Total Japan
HVG Audience

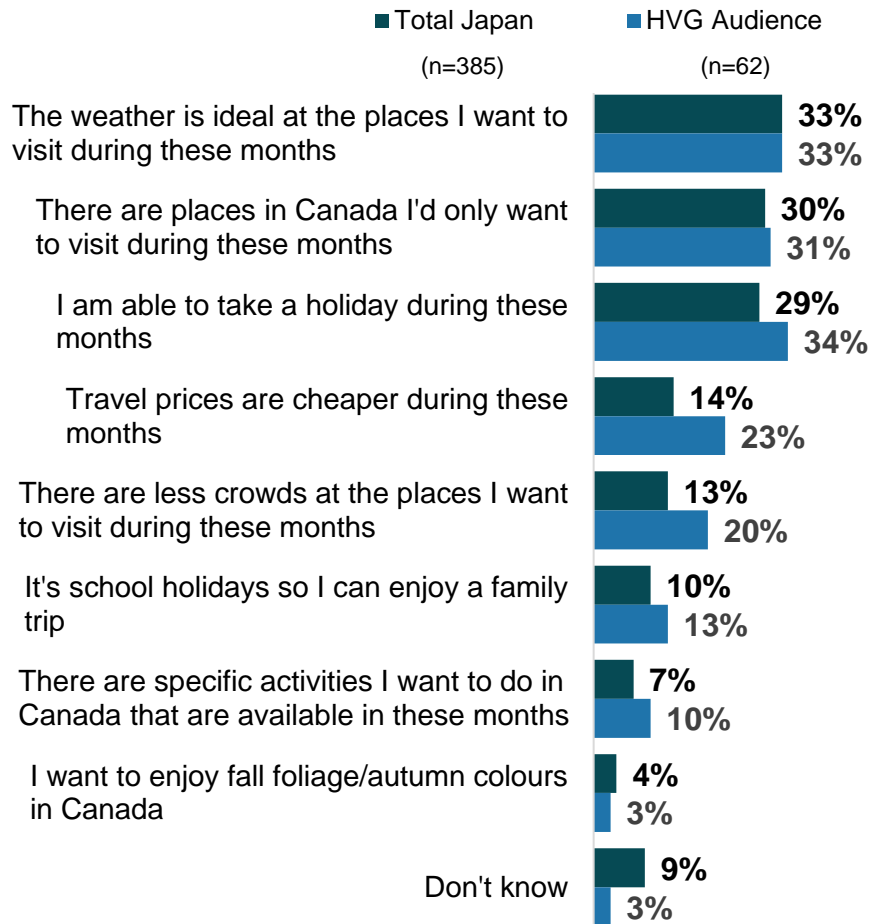


Motivators & Barriers for Fall Travel to Canada

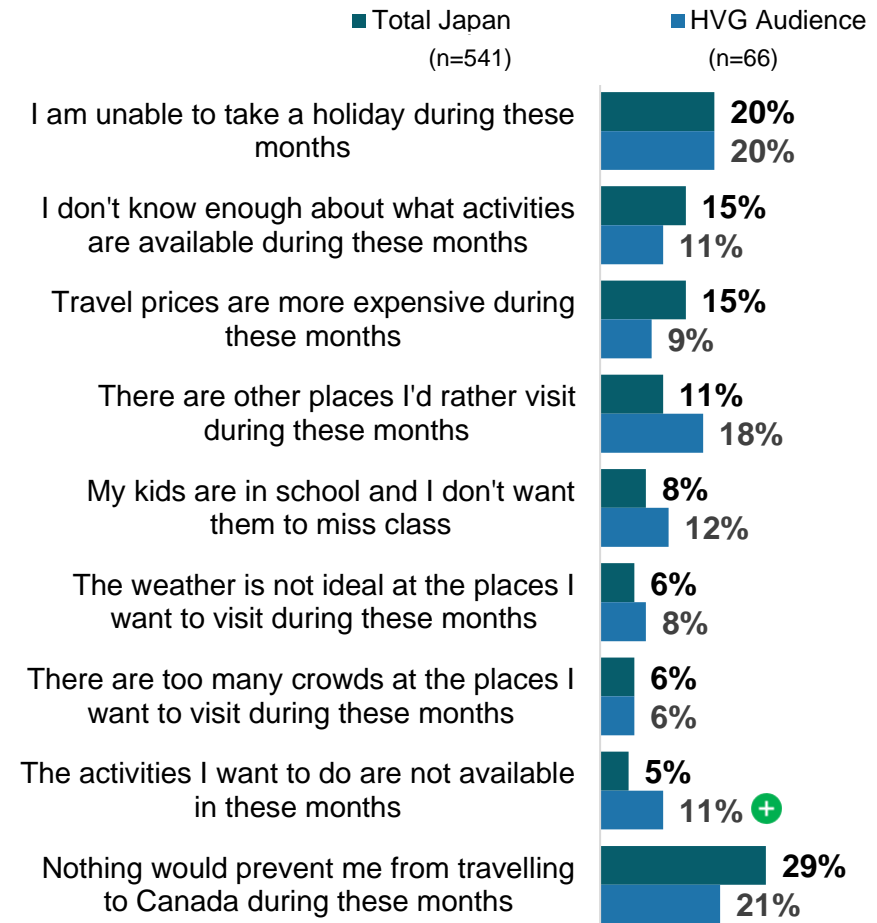


While the weather is the top motivator for Fall travel to Canada, inability to take a holiday during these months is the biggest barrier. Not knowing enough about Canada is the 2nd most mentioned barrier.

Motivators for Fall Travel



Barriers for Fall Travel



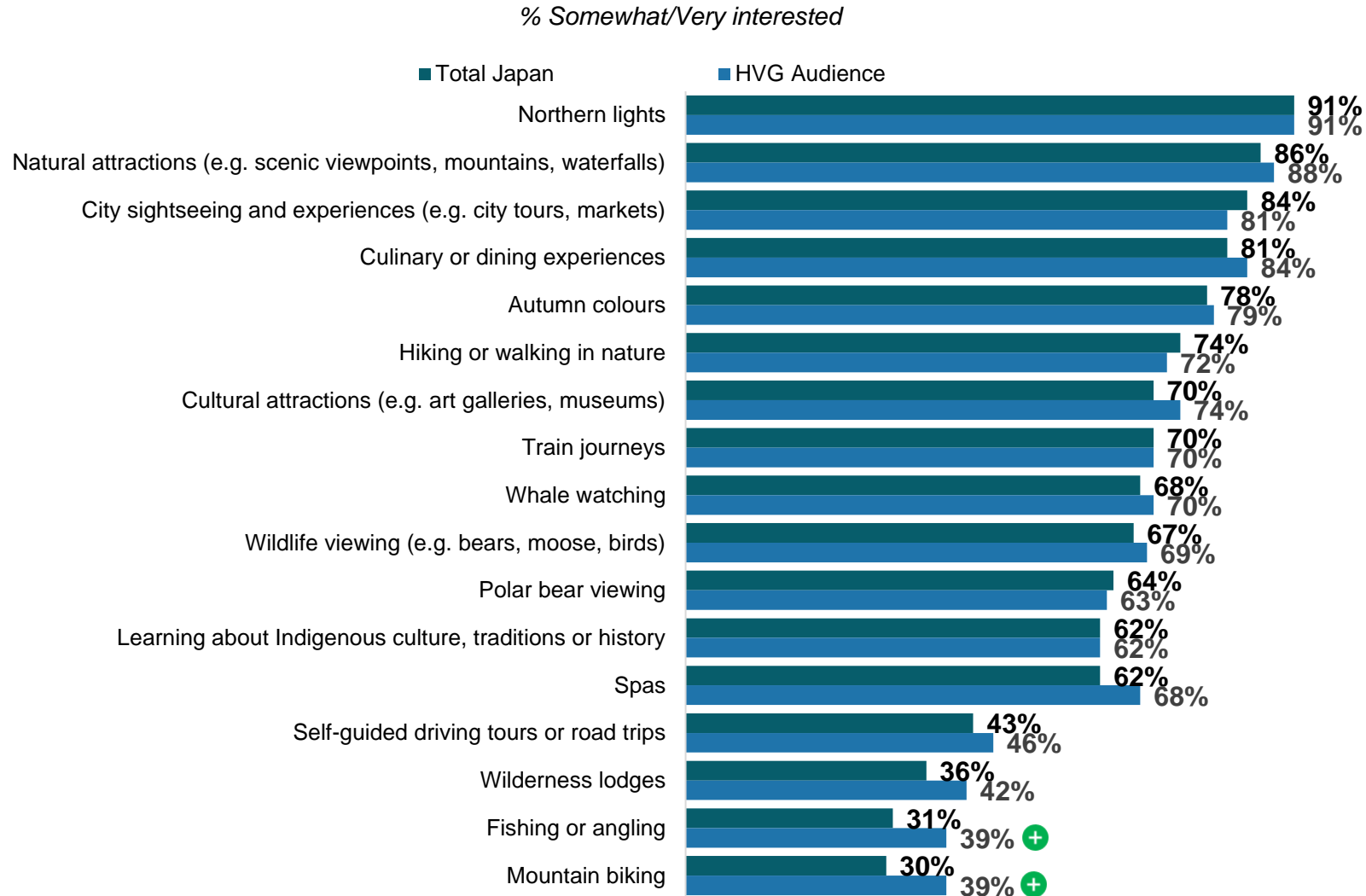
Base: Those in the dream to purchase stages of the path to purchase for Canada and considering visiting Canada or any province/territory in September, October or November E6a. You indicated earlier that you are considering taking a holiday to **Canada** during the months of September, October and/or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



Interest in Fall Activities in Canada

The Northern Lights, natural attractions, dining experiences and city experiences are top Fall activities that travellers to Canada are interested in.

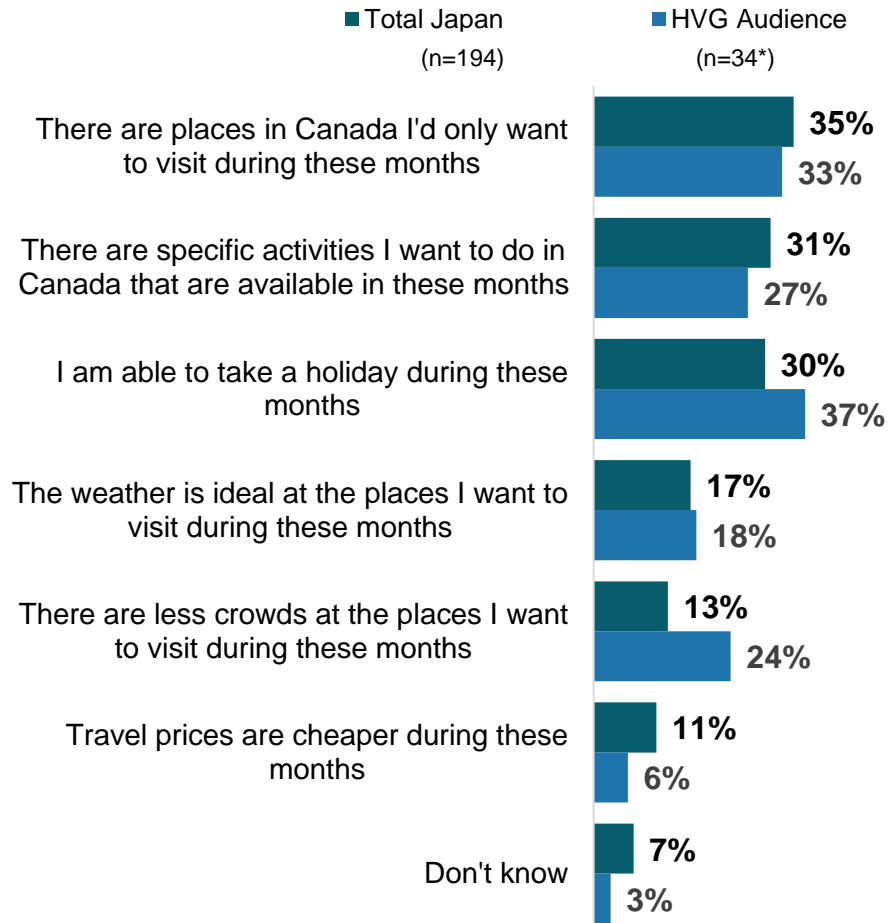


Motivators & Barriers for Winter Travel to Canada

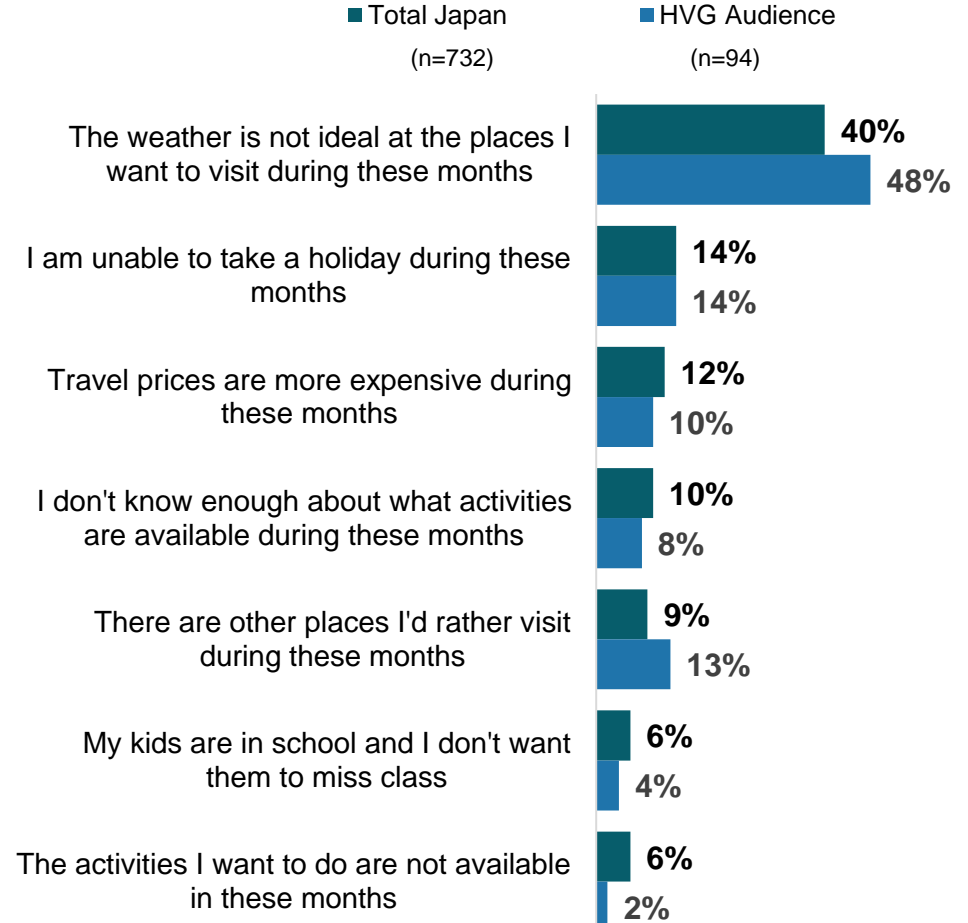


Places specific to Winter and holiday timing are the main motivators to travel to Canada in the Winter, while the weather is the biggest barrier for Japanese travellers.

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**?

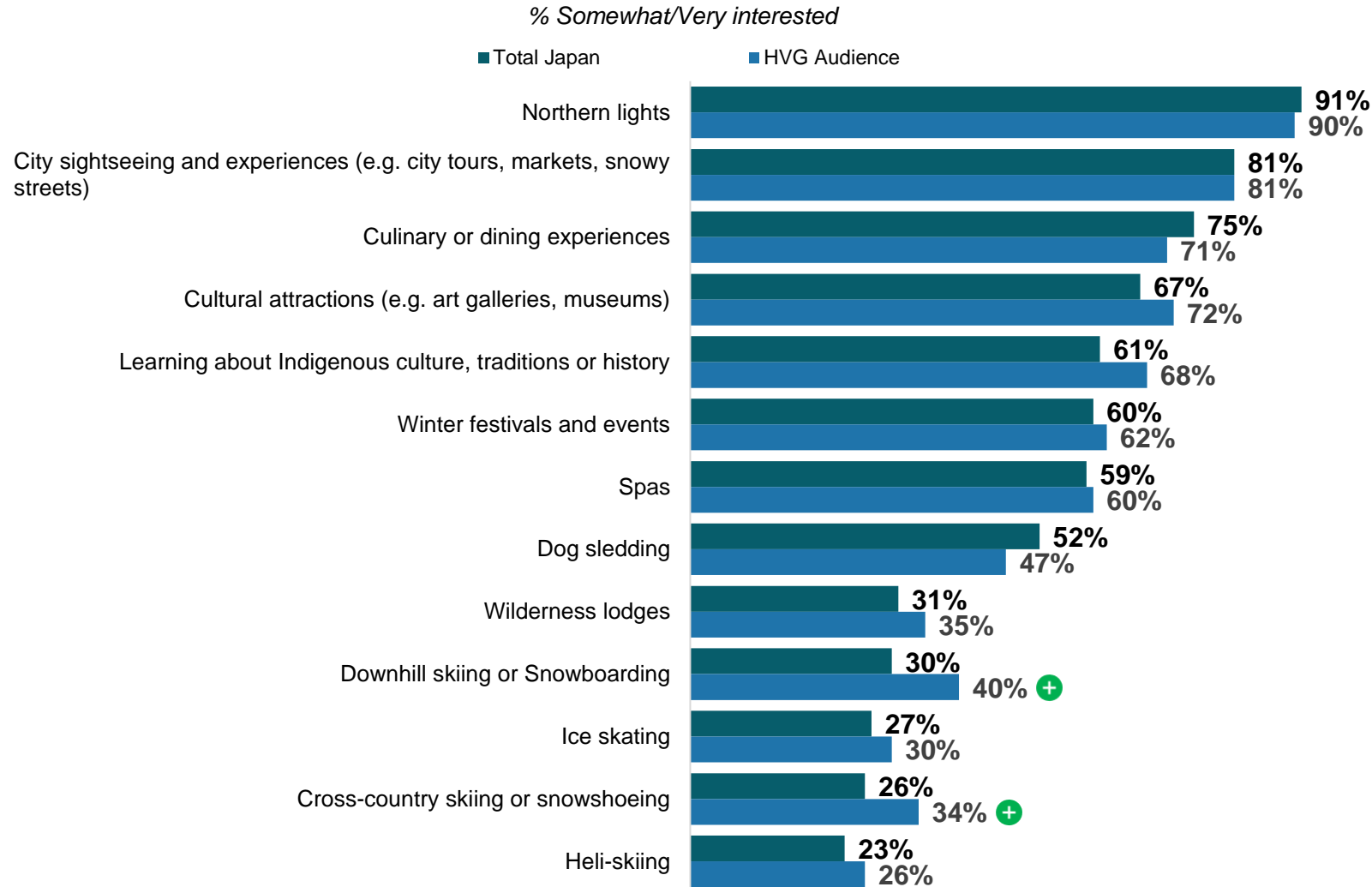
Base: Those in the dream to purchase stages of the path to purchase for Canada and not considering visiting Canada or any province/territory in December, January or February E9. You indicated earlier that you are not considering taking a holiday to **Canada** during the months of December, January and/or 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

In the Winter, the Northern Lights, city tours and culinary experiences are the top activities that interest Japanese travellers to visit Canada.





Indigenous Tourism

DESTINATION
CANADA



 British Columbia

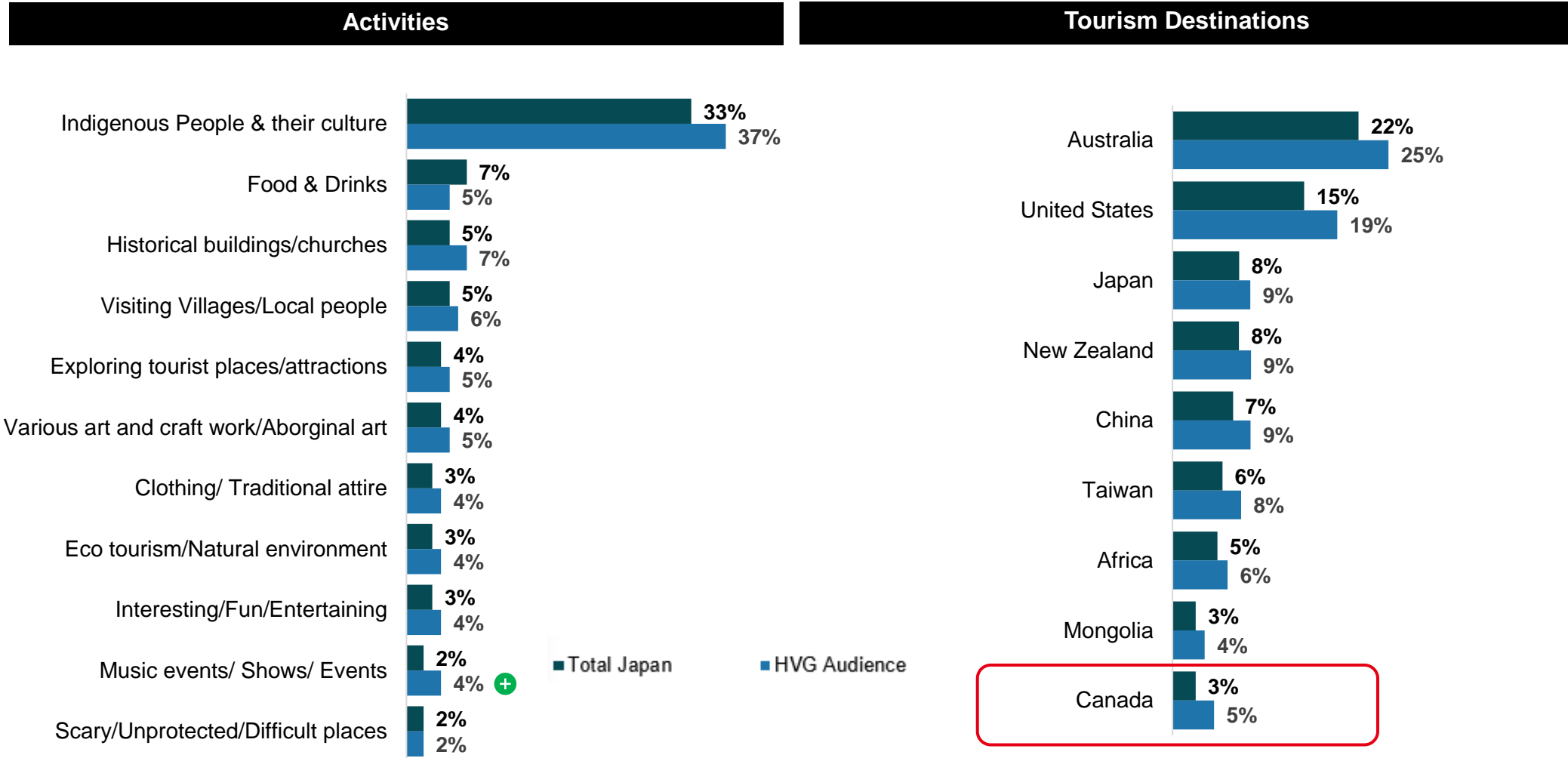


Unaided Mentions – Indigenous Cultural & Tourism Activities

People and culture are the most prevalent activities associated to Indigenous tourism; Canada is not perceived as a top destination to explore Indigenous culture.

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.

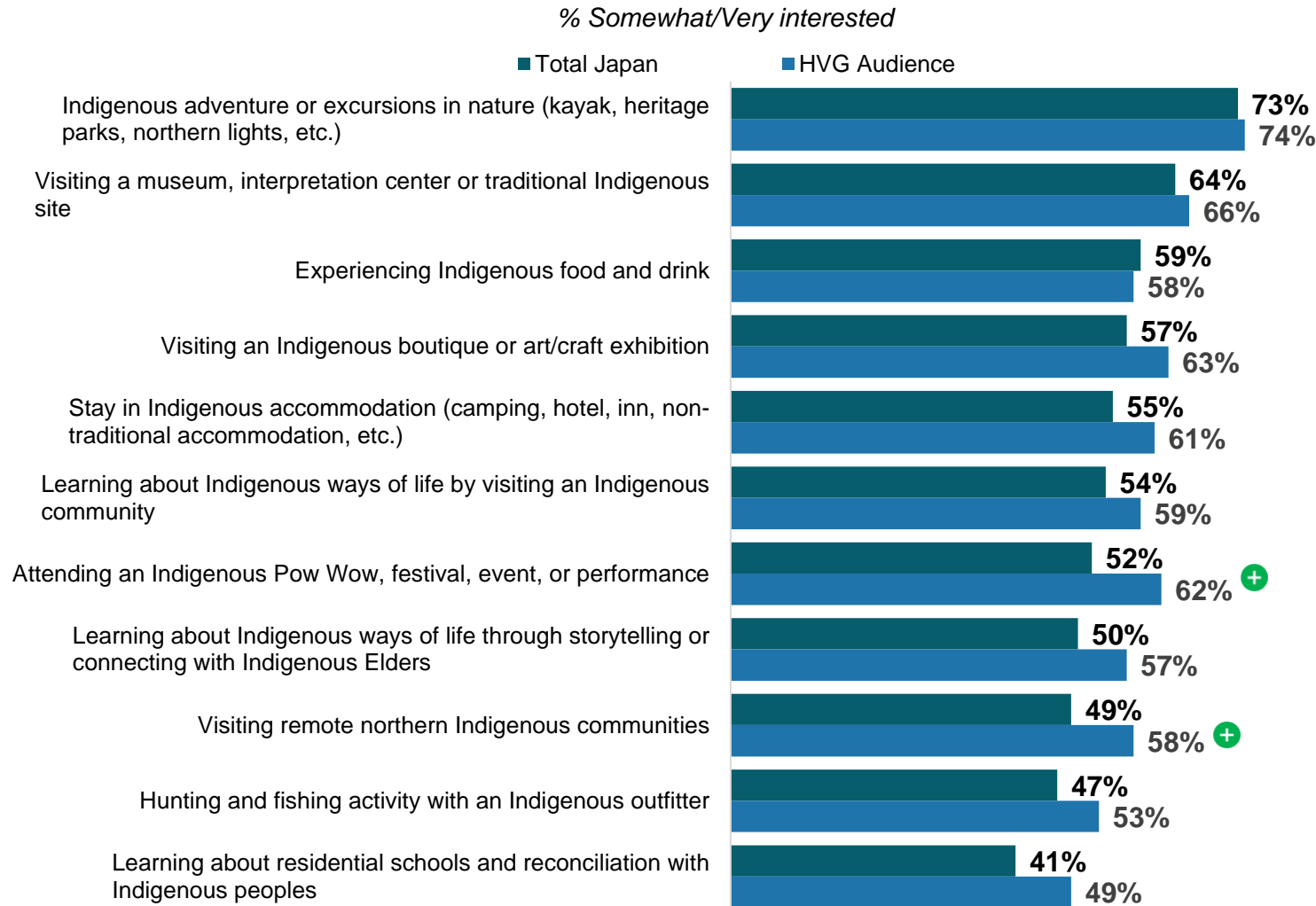


47 Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1501); HVG (n=189)
 D6. [DESCRIPTION] What comes to mind first when thinking about **Indigenous cultural and tourism activities or experiences**?
 B4. [DESCRIPTION] What destinations come to mind when thinking about **Indigenous 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

While adventuring in nature, visiting museums and experiencing the food are interesting, Japanese travellers are less interested in learning about Indigenous ways of life, visiting remote indigenous communities, fishing or learning about residential schools.



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.



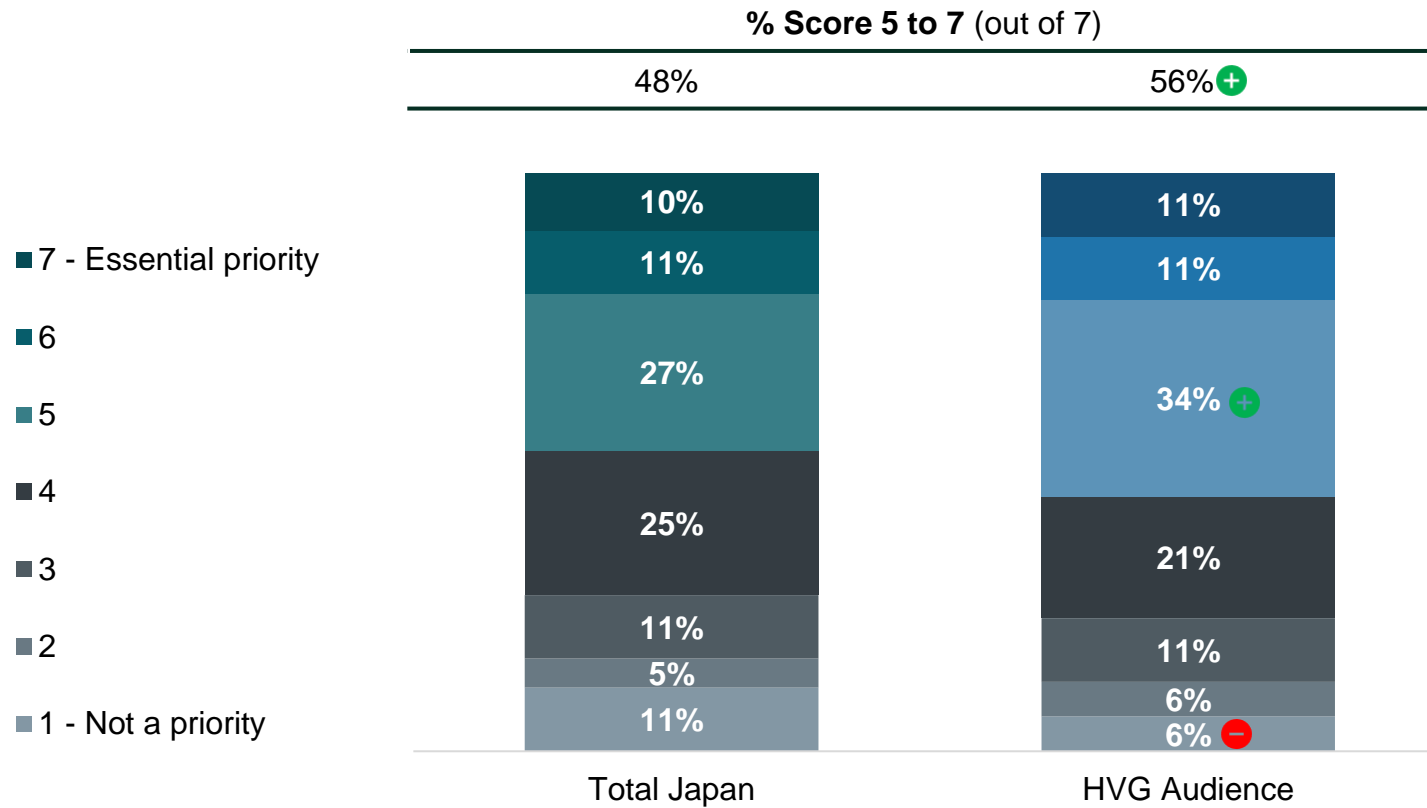


Sustainability



Priority of Sustainable Travel When Planning a Trip

Half of Japanese travellers consider sustainability a priority when planning a trip while HVGs show higher interest.



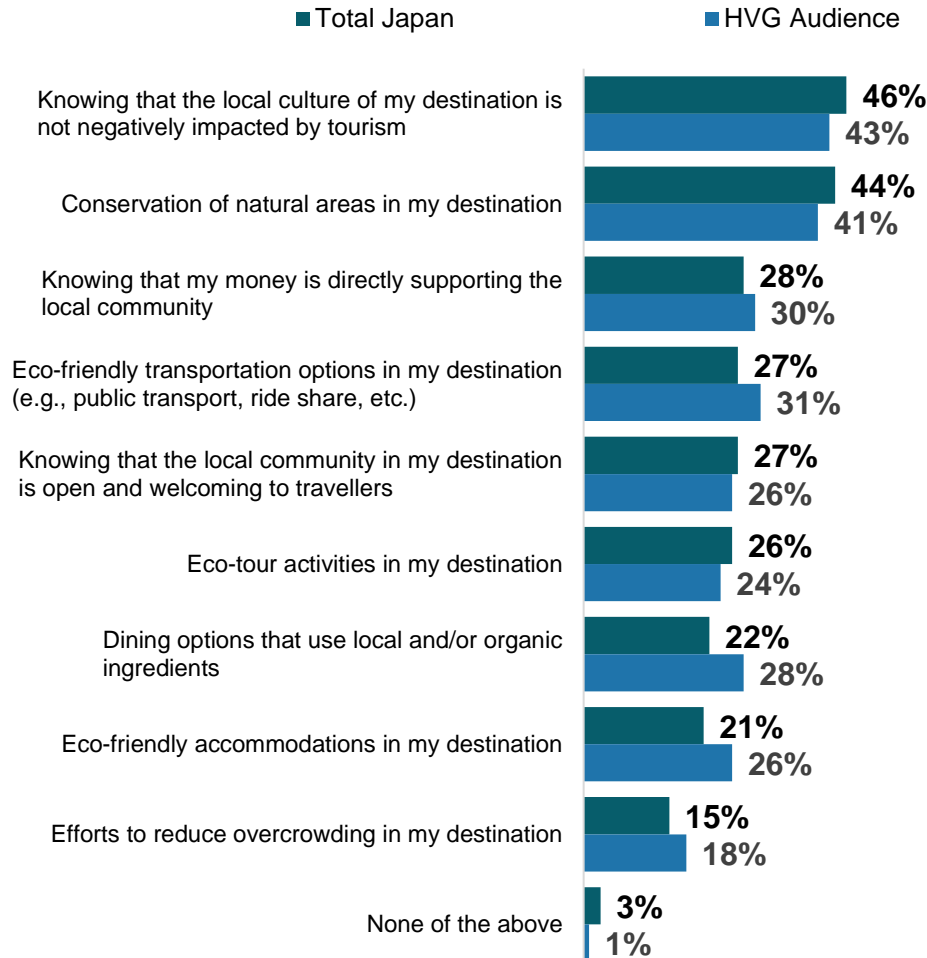
Sustainable Travel Description

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”.



Top 3 Most Important Sustainability Efforts

The most important sustainability efforts for Japanese travellers are the local culture is not negatively impacted by tourism, the conservation of natural areas, and monetary funding goes directly to support local community. HVGs share similar preferences.



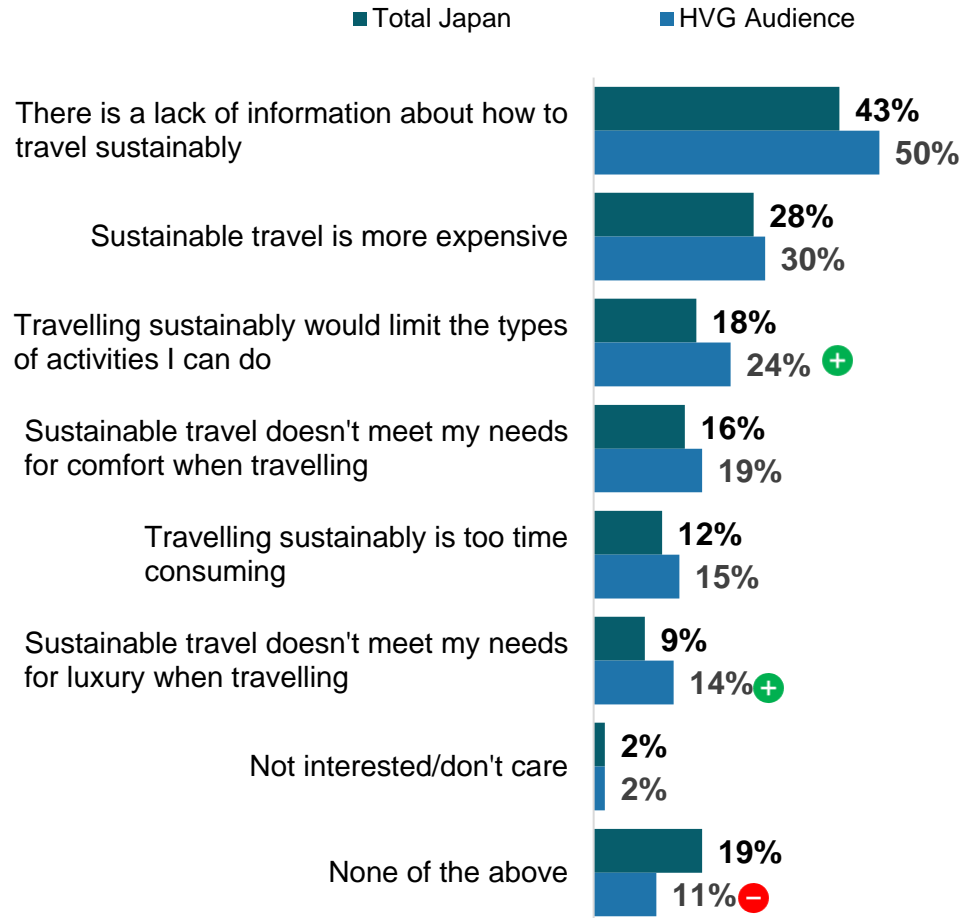
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Barriers to Sustainable Travel

The primary barrier to sustainable travel is the lack of knowledge on how to do so, additionally, it is perceived to be more expensive. HVGs appear more likely to be concerned about travelling sustainably would limit the types of activities to do, and doesn't meet the needs for luxury when travelling.



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THANK YOU

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



CANADIAN TOURISM DATA
collective