

2023 GLOBAL TRAVELLER RESEARCH PROGRAM

JAPAN HIGHLIGHTS REPORT



Canada



St. John's

Newfoundland & Labrador



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STUDY OVERVIEW: JAPAN MARKET

Target Population

The target population are residents who are aged 18 years or more, who have taken a long-haul pleasure holiday and stayed at least four nights in a paid accommodation in the last three years or are thinking about doing so in the next two years.

Timing of fieldwork

April 5th - 17th 2024

Geographical Definition for Qualified Trips

Qualified trips refer to trips taken outside of East Asia (e.g., China, Hong Kong, Macau, Japan, South Korea and Taiwan)

To note:

In 2023, DC switched research providers to YouGov Canada, with the research program evolving from the previous Global Travel Watch (GTW) to the new Global Traveller Research Program (GTRP). As a result, no trending is available for the Japan market.

Key Insights



Consideration for Canada as an international destination appears low among Japanese travellers, with next 2-year immediate potential for Canada being close to 1.4M



Japanese travellers are most interested in visiting Canada during the Summer and Fall months



Japanese travellers are mostly likely to experience local food, nature, and historical sites



Travellers to Canada in the past 3 years were mostly on a holiday with spouse or partner



Potential Japanese travellers to Canada are most interested in Indigenous activities such as nature excursions, museums, and dining

MARKET SIZING



Kyle
Saskatchewan



LONG-HAUL PLEASURE TRAVELLER SIZING



Total population aged 18 years or more¹

104,952,000

X

Incidence rate: Long-haul pleasure travellers who have taken a trip in the past 3 years or plan to in the next 2 years²

10.7%

=



Size of the Long-haul Pleasure Traveller Population

11,230,000

This study was conducted among long-haul pleasure travellers, represented by 11.2M Japanese people aged 18 years or more.



Essipit
Québec

Base: General population aged 18+ (n=2524)

¹Source: Estimates 2020 Census, Statistics Bureau of Japan

²Note: Results are from 2023 YouGov Canada Omnibus Survey

SIZE OF THE POTENTIAL MARKET TO CANADA (NEXT 2 YEARS)



Total potential long-haul pleasure travellers aged 18 years or more

11,230,000

X

Target Market for Canada

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

61.7%

=



Size of the target market

6,929,000

X

Immediate Potential for Canada

Will definitely/very likely visit Canada in the next 2 years¹

20.2%

=



Immediate potential

1,399,500

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)

7 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) Realistically, how likely are you to take a holiday trip to Canada in the **next 2 years**? (Select one)

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

The next 2-year immediate potential for Canada is 1.4 million long haul pleasure travellers.

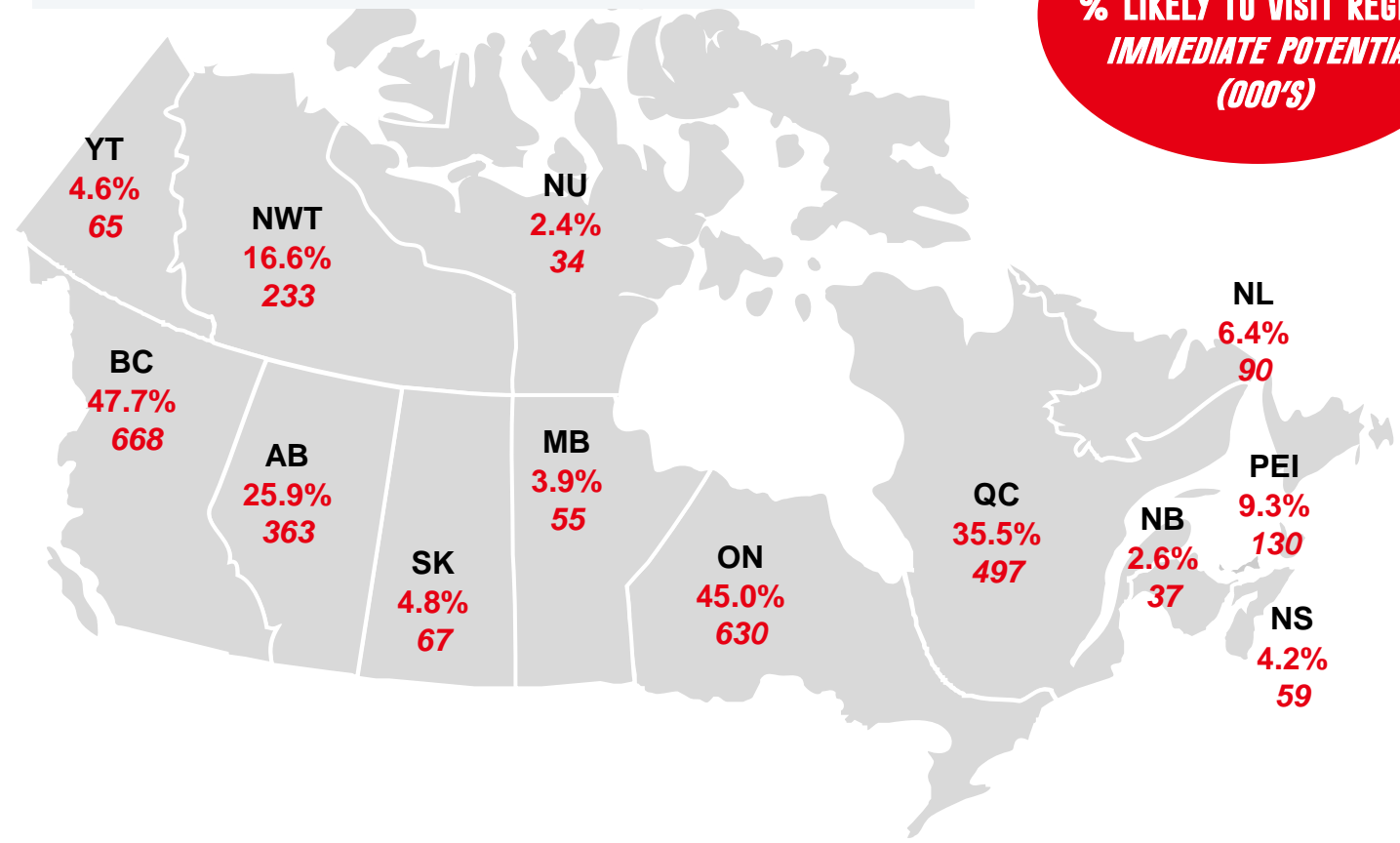


POTENTIAL MARKET SIZE FOR THE REGIONS

British Columbia and Ontario have the potential to draw in over 600,000 Japanese travellers over the next two years.

IMMEDIATE POTENTIAL FOR CANADA: **1,399,500**

KEY
% LIKELY TO VISIT REGION
IMMEDIATE POTENTIAL
(000'S)



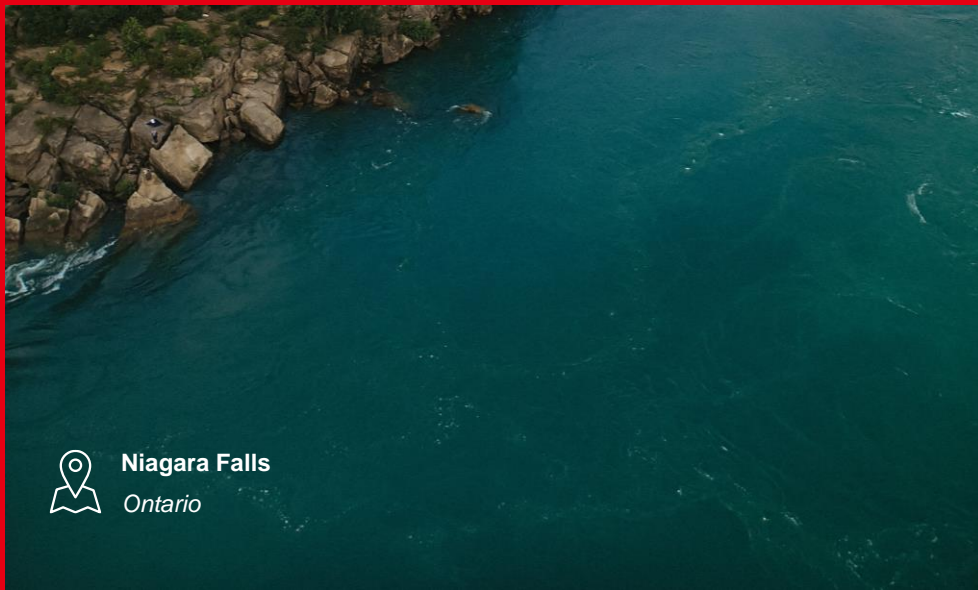
Base: Those in the dream to purchase stages of the path to purchase for Canada and definitely/very likely to take a trip to Canada (n=926)
If you were to take a holiday trip to Canada, in the next 2 years, which of the following Canadian provinces or territories are you likely to visit? (Select all that apply)



TRAVEL DESTINATIONS LIKELY TO VISIT (NEXT 2 YEARS)



Popular travel destinations include Vancouver, Niagara Falls, Toronto, and Montréal.



Niagara Falls
Ontario

British Columbia	
Vancouver	35%
Victoria	19%
Rocky Mountains	18%
Whistler	7%
Okanagan	3%
Other – BC	3%

Ontario	
Niagara Falls	32%
Toronto	27%
Ottawa	15%
Muskoka	2%
Other – ON	2%

Alberta	
Rocky Mountains	14%
Calgary	12%
Banff	10%
Edmonton	5%
Jasper	5%
Other – AB	1%

Québec	
Montréal	26%
Québec City	16%
Mont Tremblant	5%
Other – QC	3%

Base: Those in the dream to purchase stages of the path to purchase for Canada & definitely/likely to take a trip to Canada (n=926)
Within [PROVINCE], which travel destinations are you likely to visit? (Select all that apply)

TRAVEL DESTINATIONS LIKELY TO VISIT (NEXT 2 YEARS) (CONTINUED)

Saskatchewan	
Saskatoon	2%
Regina	1%
Other – SK	2%

Manitoba	
Churchill	2%
Winnipeg	2%
Other – MB	1%

New Brunswick	
Saint John	2%
Fredericton	1%
Other – NB	1%

Nova Scotia	
Halifax	3%
Cape Breton	1%
Other – NS	2%

Prince Edward Island	
Charlottetown	7%
Other – PEI	5%

Newfoundland & Labrador	
St. John's	4%
Other – NL	3%

Yukon	
Whitehorse	3%
Dawson City	2%
Other – YT	1%

Northwest Territories	
Yellowknife	14%
Inuvik	3%
Other – NWT	2%

Nunavut	
Iqaluit	2%
Other – NU	1%



Potential Japanese travellers to Canada also show some interest in visiting Yellowknife.



10 Base: Those in the dream to purchase stages of the path to purchase for Canada & definitely/likely to take a trip to Canada (n=926) Within [PROVINCE], which travel destinations are you likely to visit? (Select all that apply)



TIME OF YEAR INTERESTED IN TAKING A TRIP TO CANADA (NEXT 2 YEARS)

Province/Territory	Winter (Dec, Jan, Feb)	Spring (Mar, Apr, May)	Summer (Jun, Jul, Aug)	Fall (Sept, Oct, Nov)
British Columbia	6%	10%	19%	15%
Alberta	3%	6%	9%	8%
Saskatchewan	1%	2%	3%	1%
Manitoba	1%	2%	2%	2%
Ontario	4%	8%	16%	14%
Québec	5%	8%	15%	13%
New Brunswick	0%	1%	2%	1%
Nova Scotia	1%	1%	2%	2%
Prince Edward Island	1%	3%	5%	3%
Newfoundland & Labrador	1%	2%	3%	3%
Yukon	2%	1%	2%	2%
Northwest Territories	5%	4%	6%	5%
Nunavut	1%	1%	1%	1%



Potential Japanese travellers to Canada are most interested in visiting during the summer and fall months.



 Falcon Trails Resort
Manitoba



11 Base: Those in the dream to purchase stages of the path to purchase for Canada & definitely/likely to take a trip to Canada (n=926)
During what time of year are you considering visiting [PROVINCE]? (Select all that apply)



Peggy's Cove
Nova Scotia



CANADIAN TOURISM DATA
collective



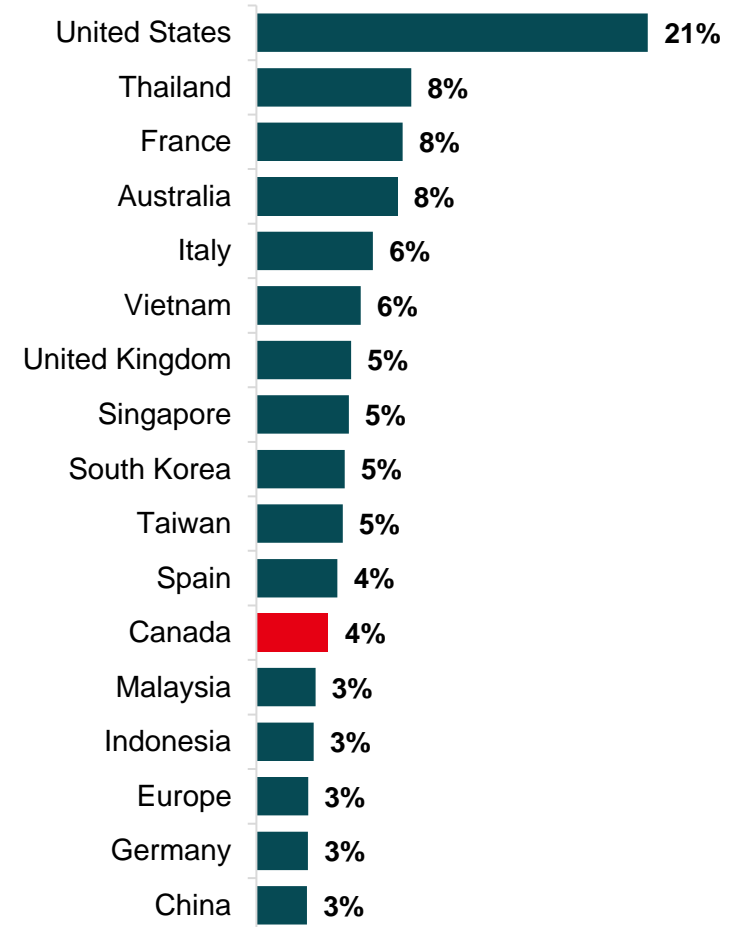
DESTINATION
CANADA

CONSIDERING CANADA AS A TRAVEL DESTINATION



UNAIDED DESTINATION CONSIDERATION (NEXT 2 YEARS)¹

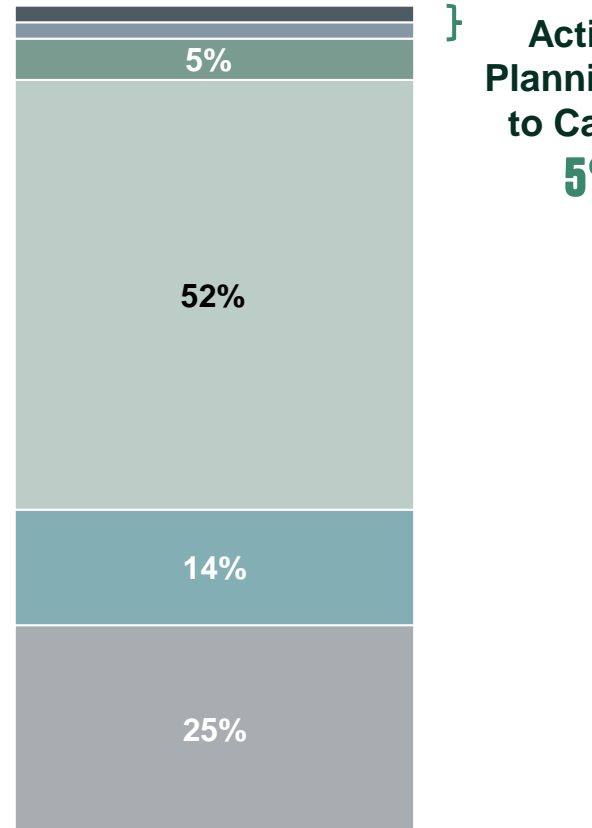
Canada ranks relatively low for destination consideration on an unaided basis.



Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1501)
 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)
¹Note: Roll-up of brand mentions by country (e.g., percentage who said "Canada" or any destination in Canada).

STAGE IN THE PURCHASE CYCLE 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



Actively Planning trip to Canada 5%

Only five percent of Japanese travellers are actively planning a trip to Canada.



TRAVEL BEHAVIOURS



Whitehorse
Yukon



TOP 10 GENERAL ACTIVITIES INTERESTED IN

64%

Trying Local Food and Drink

44%

Local Markets

58%

Nature Walks

43%

Shopping for Items That Help Me Remember My Trip

55%

Natural Attractions

40%

Art Galleries or Museums

52%

Historical, Archaeological or World Heritage Sites

40%

Culinary Tours or Cooking Classes

47%

Northern Lights

38%

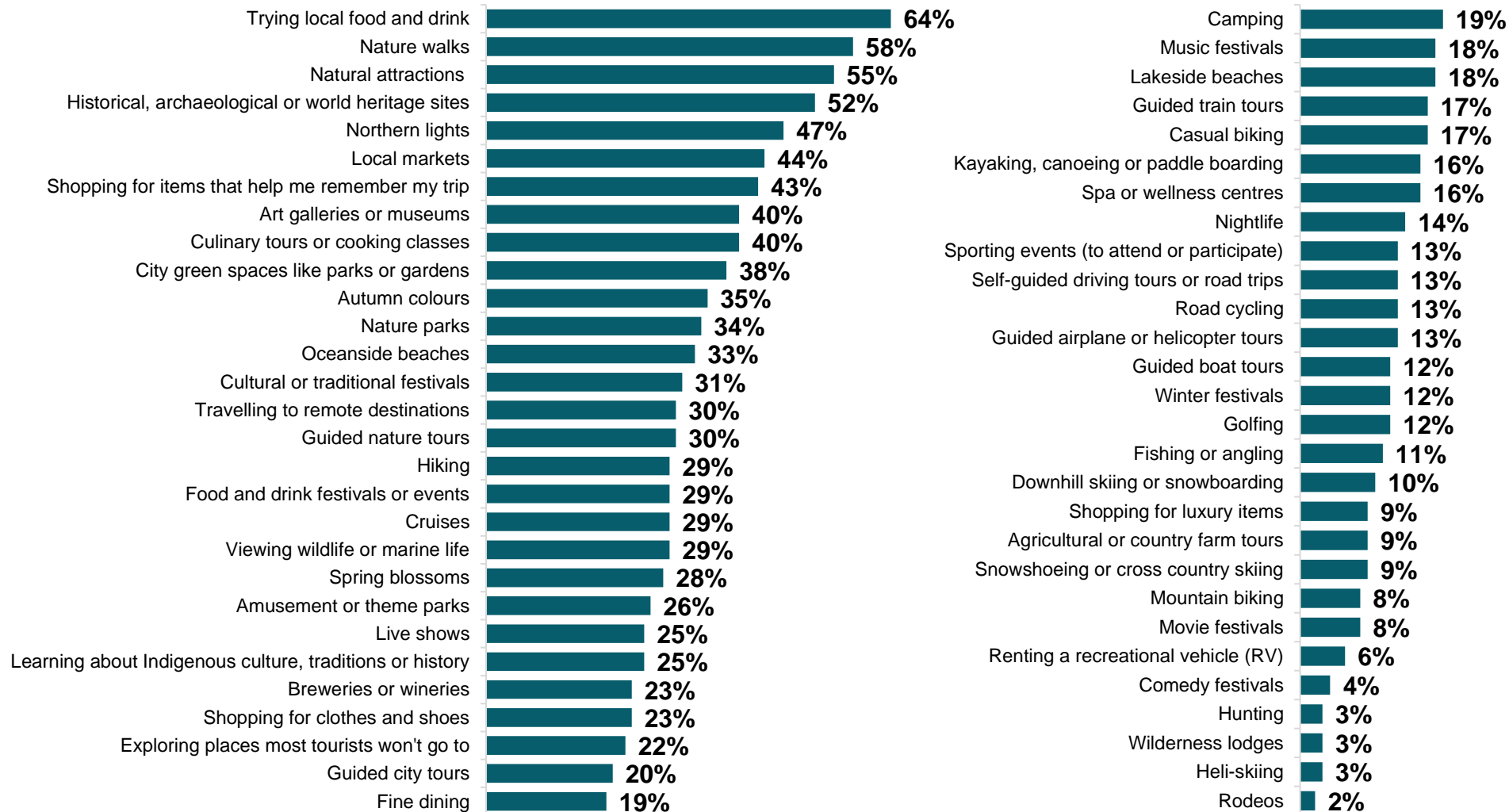
City Green Spaces Like Parks or Gardens



The top activities Japanese travellers are interested in include trying local food, going on nature walks, seeing natural attractions, and visiting historical sites.



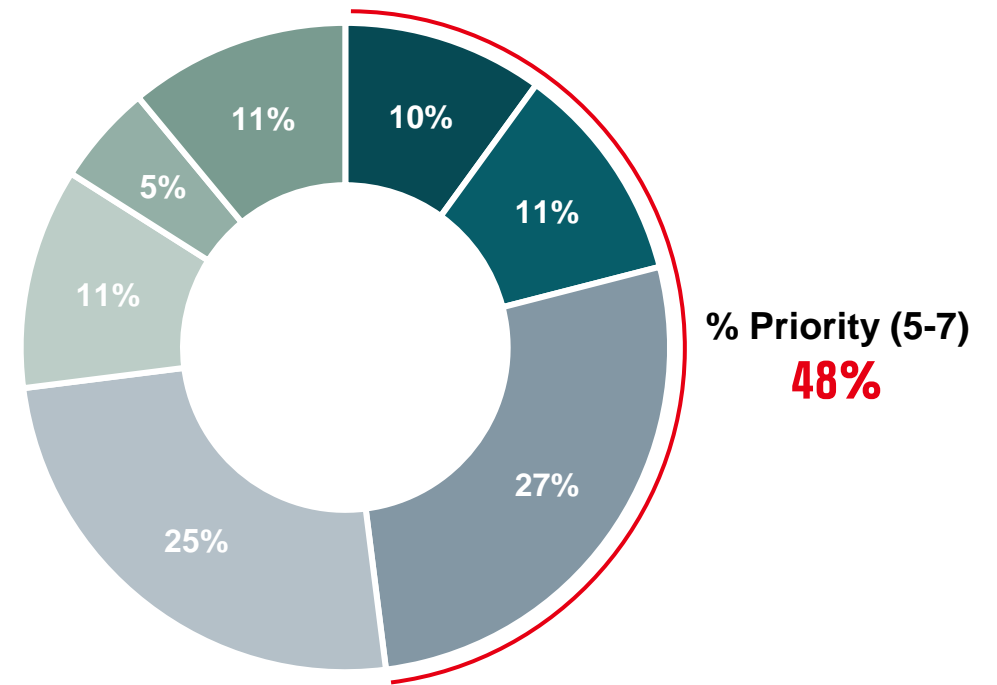
GENERAL ACTIVITIES INTERESTED IN (FULL LIST)



Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1501)
In general, what activities or places are you interested in while on holiday? (Select all that apply)



PRIORITY OF SUSTAINABLE TRAVEL WHEN PLANNING A TRIP



■ 7 - Essential priority ■ 6 ■ 5 ■ 4 ■ 3 ■ 2 ■ 1 - Not a priority

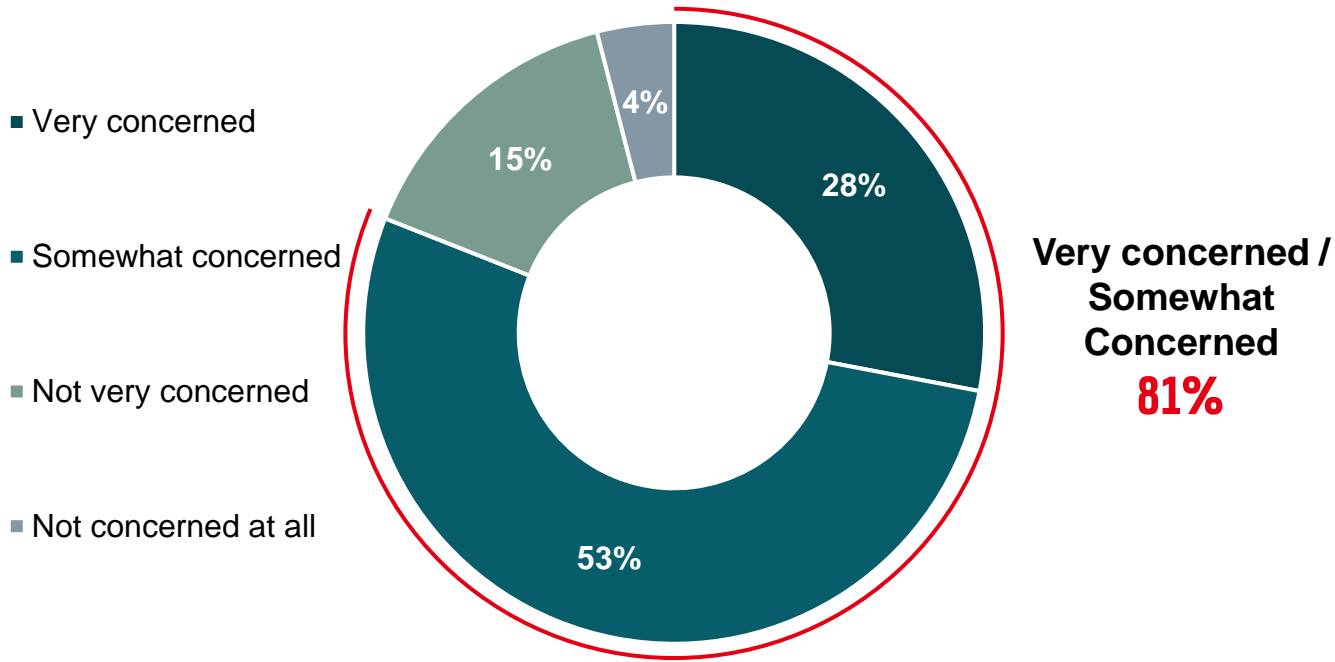
Almost half of Japanese travellers consider sustainable travel a priority.



Nahanni
Northwest Territories

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1501)
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'.
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



19% Changed/Cancelled plans in the past 3 years due to extreme weather events

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=746)
 How concerned are you about extreme weather events affecting your travel plans?
 In the past 3 years, have you ever had to change plans or cancel a trip due to extreme weather events?
 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.



Eight in ten Japanese travellers are concerned about extreme weather events, but only two in ten have had to change their plans due to weather issues in the past three years.



INDIGENOUS TOURISM ACTIVITIES

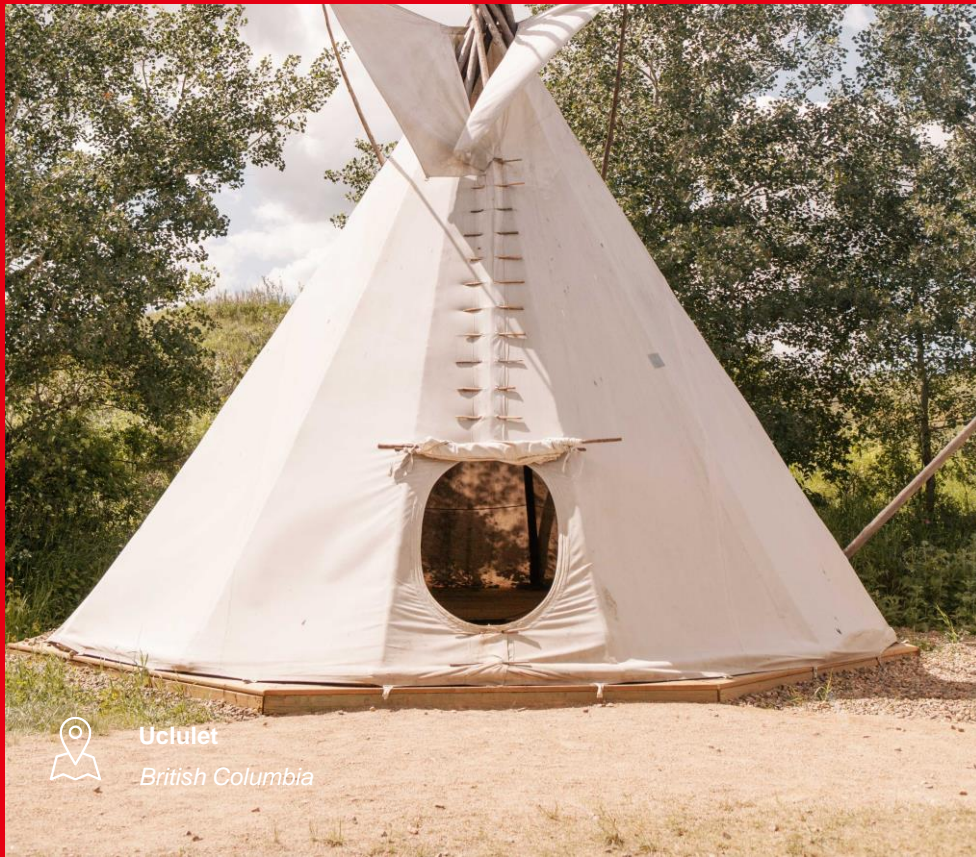


British Columbia



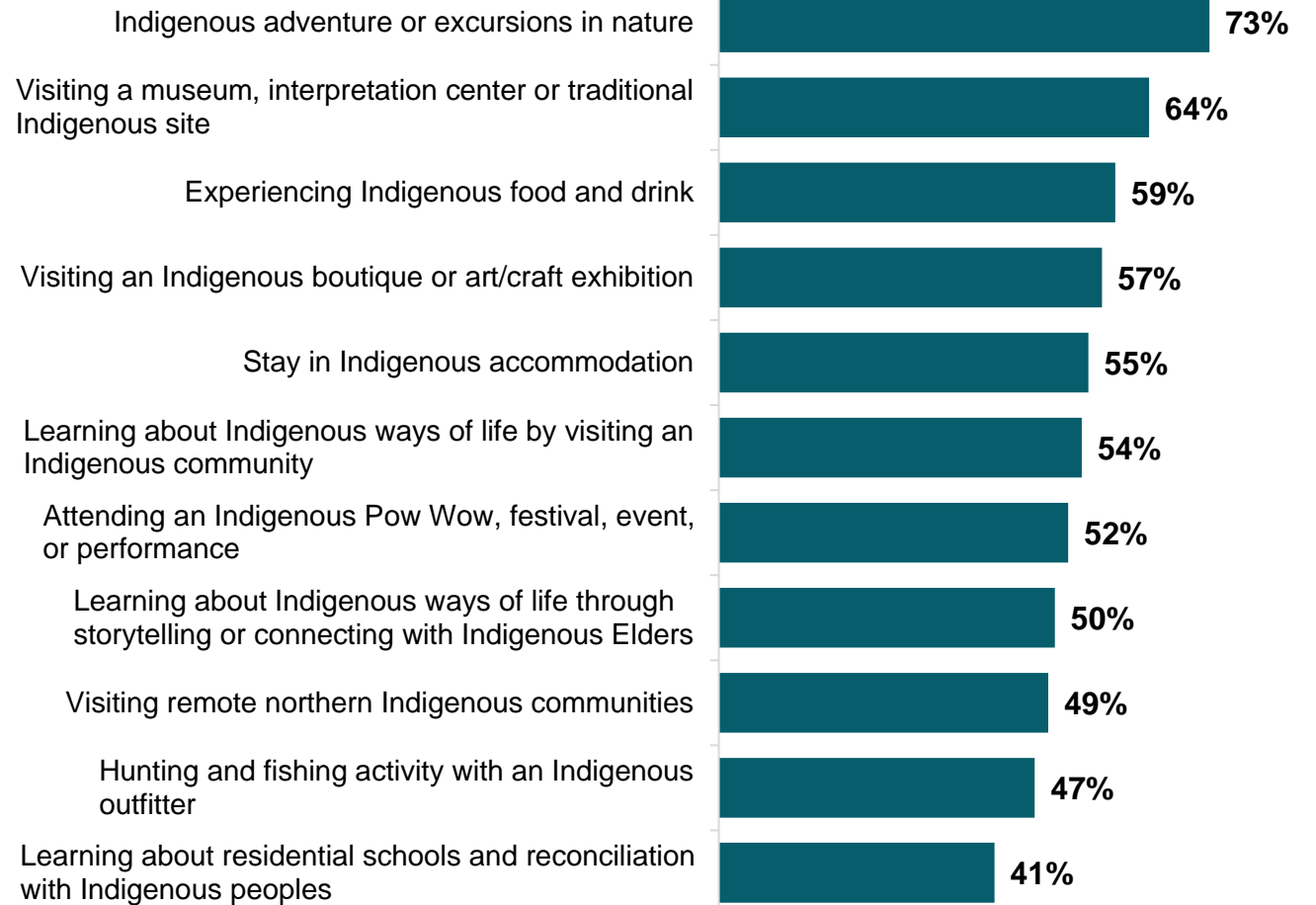
INTEREST IN INDIGENOUS CULTURAL & TOURISM ACTIVITIES

Potential Japanese travellers to Canada are most interested in Indigenous activities such as nature excursions, museums, and dining.



Uclulet
British Columbia

% Somewhat/Very Interested



Base: Those in the dream to purchase stages of the path to purchase for Canada (n=926)
What is your level of interest in the following Indigenous cultural experiences and tourism activities in Canada? 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.

TRIP TO CANADA IN THE PAST 3 YEARS



Jasper
Alberta



TOP 10 ACTIVITIES PARTICIPATED IN DURING PAST 3 YEAR TRIP TO CANADA

Travellers to Canada in the past 3 years were most likely to try local food, shop for souvenirs, and go on nature walks during their trip.

40%

Trying Local Food and Drink

26%

Natural Attractions

37%

Shopping for Items to Remember My Trip

26%

Historical, Archaeological or World Heritage Sites

37%

Nature Walks

24%

Local Markets

32%

City Green Spaces

24%

Amusement or Theme Parks

31%

Nature Parks

24%

Fine Dining

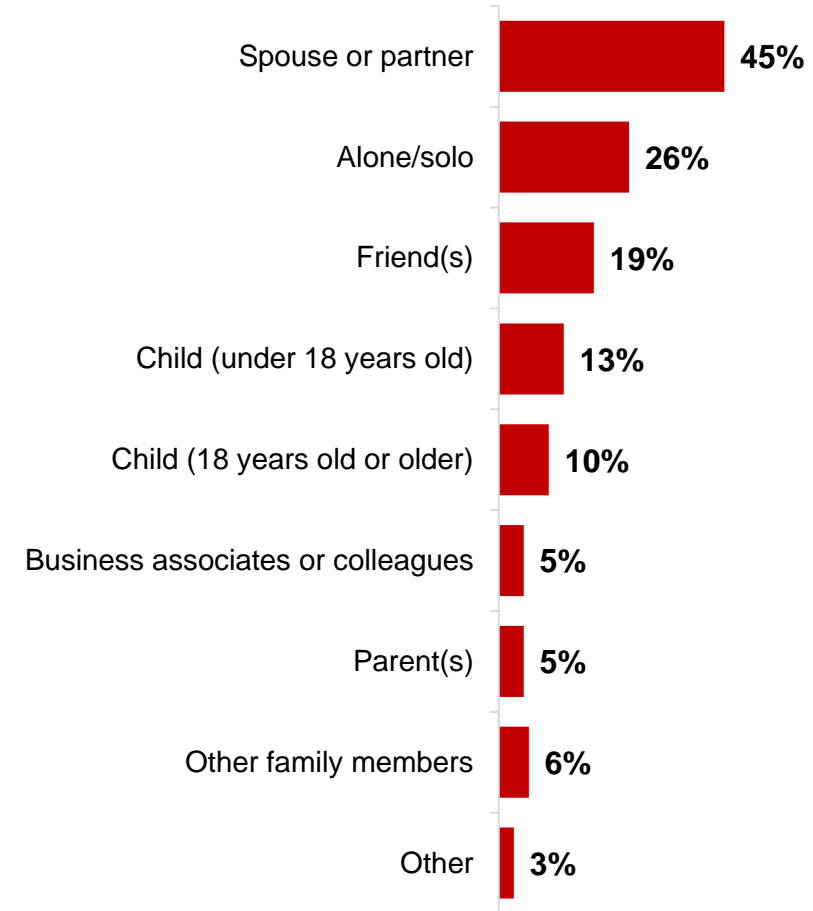


Johnston Canyon
Alberta

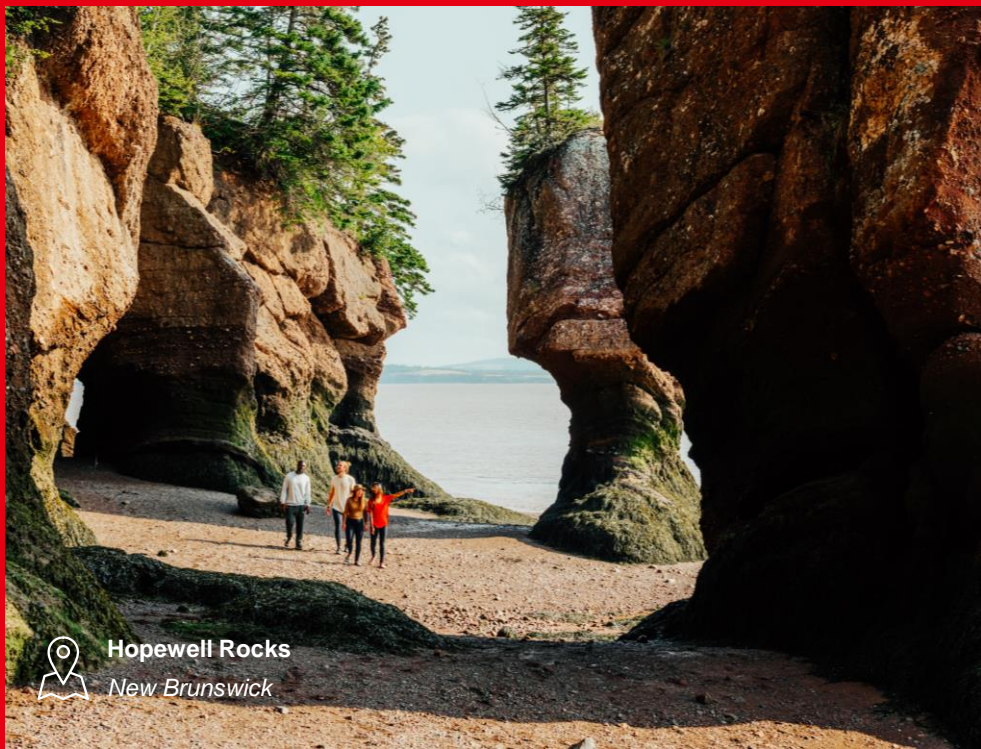
Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travellers to Canada (n=40*)
Which of the following activities, if any, did you participate in during your recent trip to Canada?
(Select all that apply)
*Small base size, interpret with caution (n<50)

TRAVEL PARTY OF PAST 3 YEAR TRIP TO CANADA

Travellers to Canada in the past 3 years most likely came with a significant other. Travellers also visited for a solo trip.



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



ORGANIZED GROUP TOUR USAGE FOR PAST 3 YEAR TRIP TO CANADA

Almost six in ten travellers to Canada in the past 3 years used an organized group tour for at least part of their trip.

Yes, my whole trip was part of an organized group tour

13%

Yes, a portion of my trip was part of an organized group tour

45%

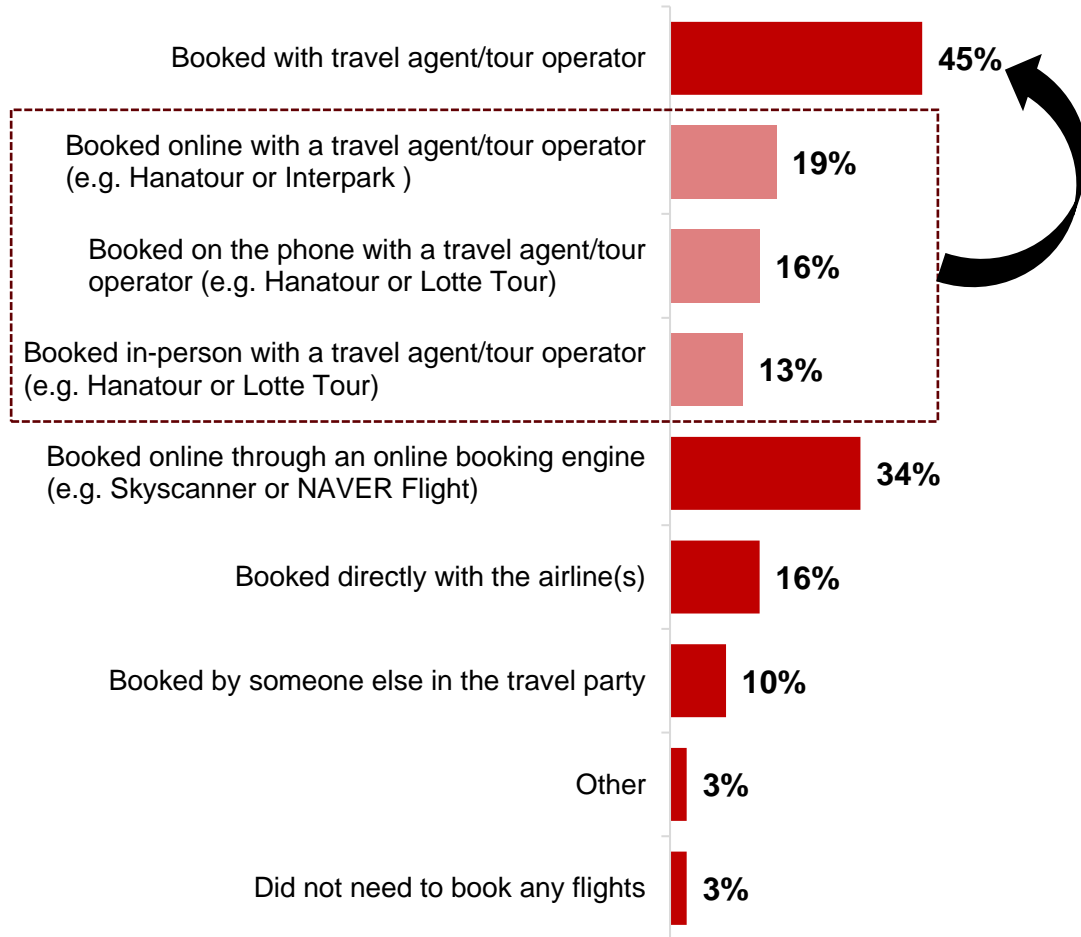
No

42%

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travellers to Canada (n=40*)
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 PAST 3 YEAR TRIP TO CANADA



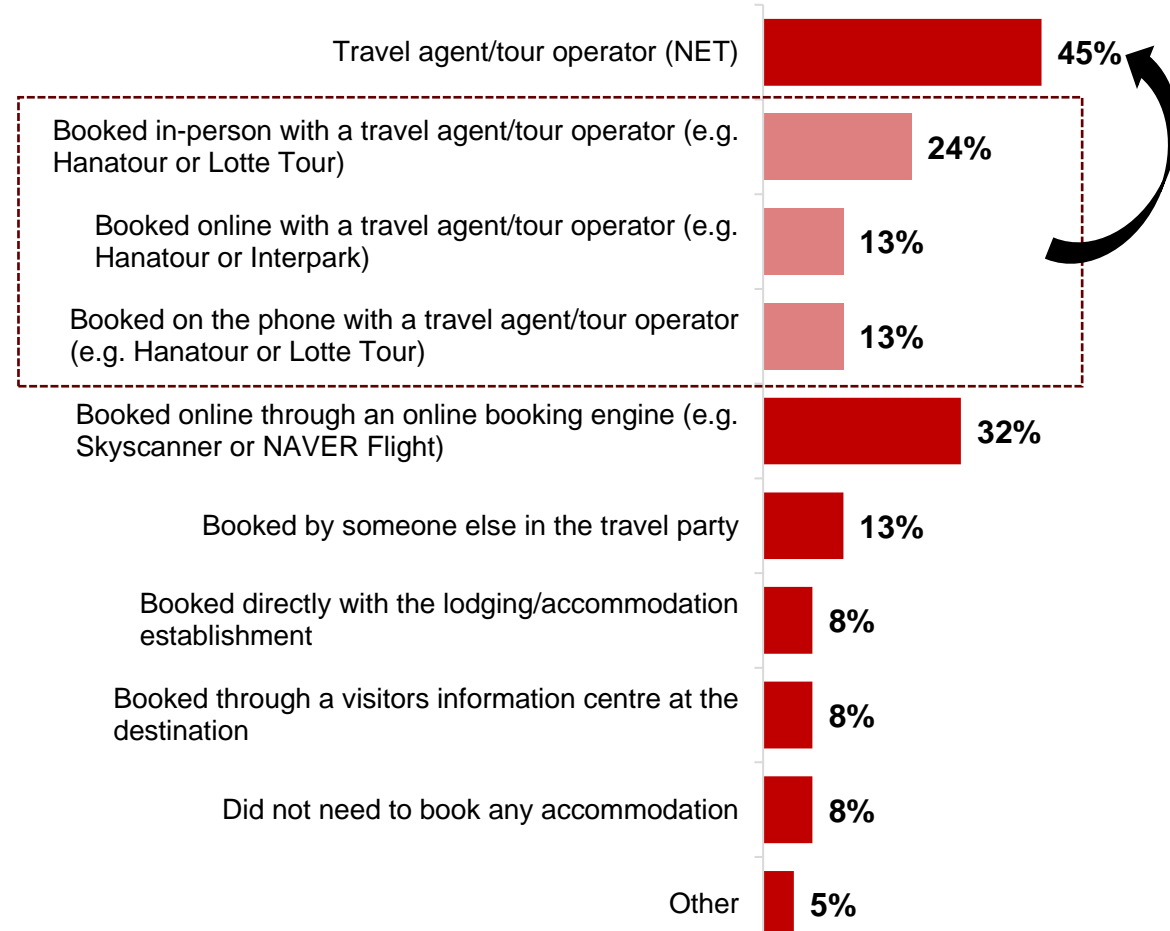
Travellers to Canada in the past 3 years were most likely to book flights through a travel agent or tour operator, followed by an online booking engine.

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travellers to Canada (n=40*)
 How did you book your flight for this trip? (Select all that apply)
 *Small base size, interpret with caution (n<50)

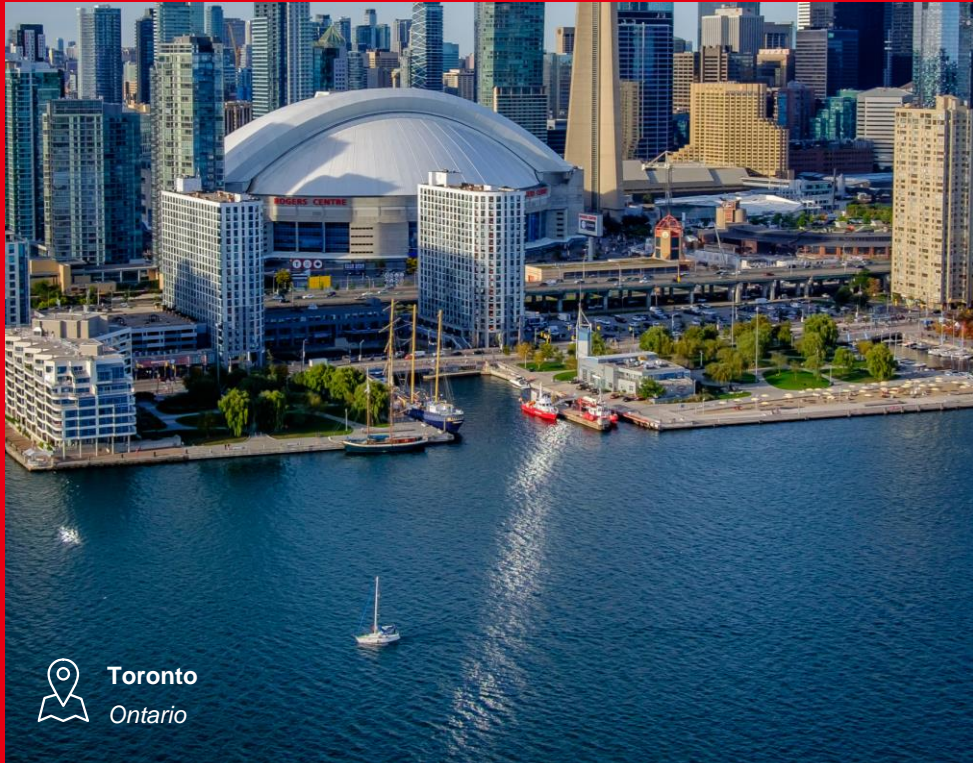


BOOKING ACCOMMODATIONS FOR PAST 3 YEAR TRIP TO CANADA

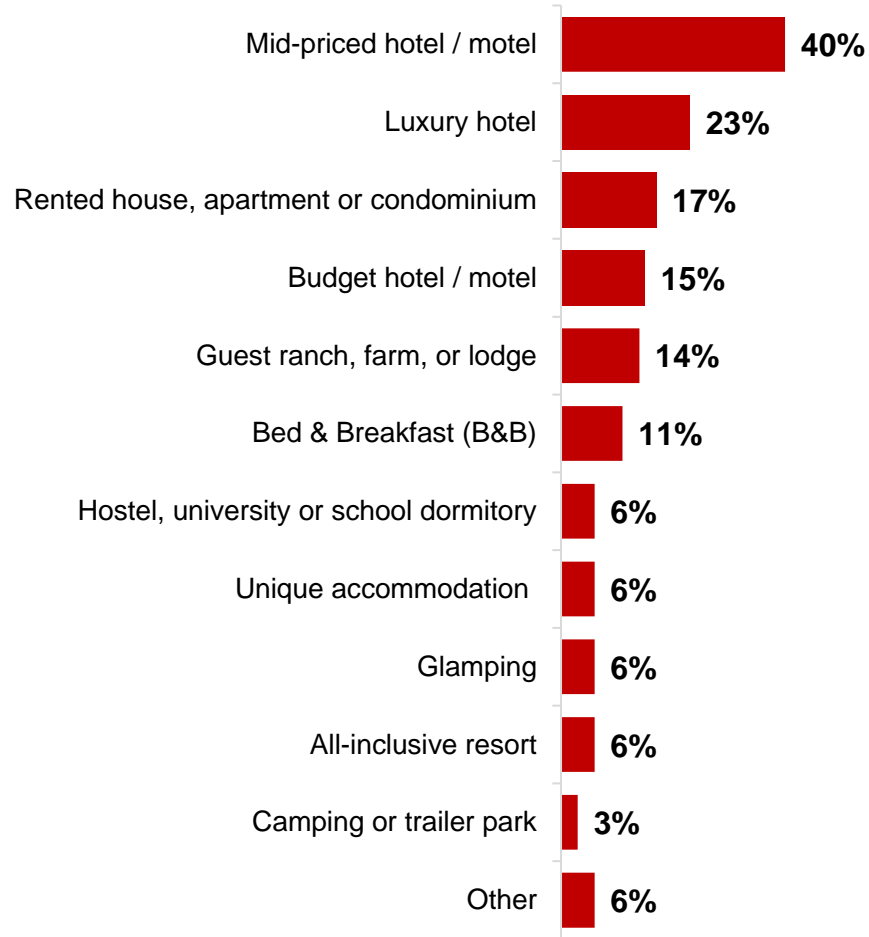
Travellers to Canada in the past 3 years were also most likely to book accommodations through a travel agent or tour operator, followed by using a booking engine.



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



TYPES OF ACCOMMODATION DURING PAST 3 YEAR TRIP TO CANADA



Base: Long-haul holiday travellers (past 3 years or next 2 years), Travellers to Canada (n=37*)
 Which type of accommodation did you stay in during this trip? (Select all that apply)
 *Small base size, interpret with caution (n<50)



Travellers to Canada in the past 3 years were most likely to stay in a mid-priced or luxury hotel.



THANK YOU

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



CANADIAN TOURISM DATA
collective