

# 2024 GLOBAL TRAVELLER RESEARCH PROGRAM

## JAPAN HIGHLIGHTS REPORT



Canada



Fogo Island    *Newfoundland and Labrador*



CANADIAN TOURISM DATA  
**collective**



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# STUDY OVERVIEW: JAPAN MARKET

The Global Traveller Research Program is an annual survey commissioned by Destination Canada and conducted by YouGov Canada. The study fielded online in Japanese, with sample being sourced from a nationally established panel.

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.

Highly Engaged Guest (HEG) Audience Definition: Four segments that have been identified by Destination Canada as having higher economic and responsible values that most benefit Canadian communities.



**Timing of Fieldwork**

**November 19<sup>th</sup> –  
December 3<sup>rd</sup> 2024**



**Geographical Definition  
for Qualified Trips**

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



**Sample Distribution**

<b>Sample distribution:</b>	<b>National</b>
<b>Highly Engaged Guest (HEG) Audience:</b>	824
<b>Other travellers:</b>	676
<b>Total sample size:</b>	1500

- In 2023, DC switched research providers to YouGov Canada, with the project being migrated over to YouGov’s proprietary panel.



# 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 1.5M**



**Potential visitors to Canada are more likely to consider a visit during the Summer months, followed by Fall**



**Travellers are interested in trying local cuisine, natural attractions, nature walks, and historical archaeological or world heritage sites**



**Travellers to Canada in the past 3 years were mostly on holiday trips, choosing Canada for factors such as safety and comfort, the destination being somewhere they always wanted to visit, and to relax**



**Japanese travellers express that safety and comfort of the destination, as well accessibility and ease of travel would increase their interest in Indigenous cultural experiences**



# MARKET SIZING



Killarney Provincial Park  
Ontario

# MARKET SIZING – LONG-HAUL TRAVELLERS

Total Population 18+

104,952,000 (Total JP Population 18+)

7% Took a Long-Haul<sup>^</sup> Pleasure Trip in the Past 3 Years

7% Plan To Take a Long-Haul Pleasure Trip In Next 2 Years

7,346,500 (Recent Long-Haul Travellers)

7,346,500 (Upcoming Long-Haul Travellers)

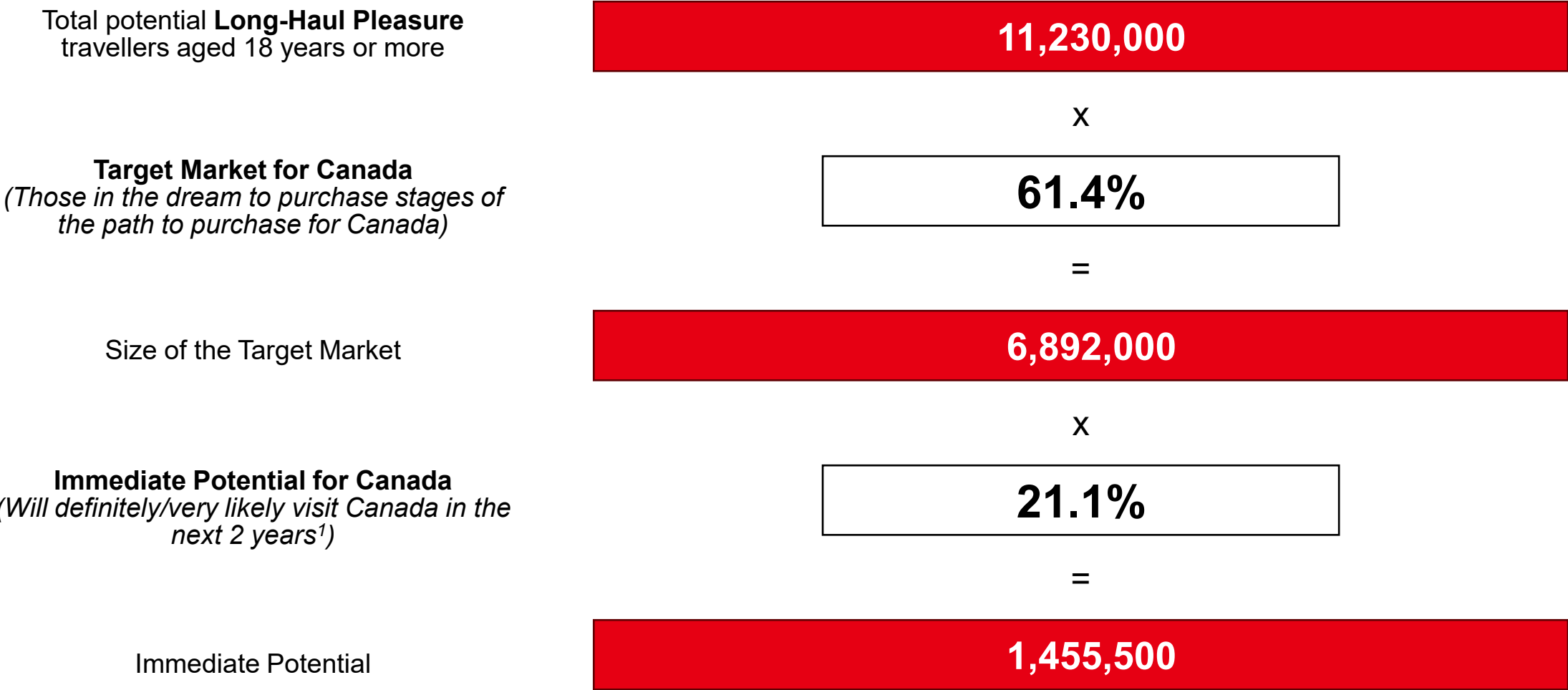
10.7% Incidence Rate

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

11,230,000 (Total Long-haul Travellers)

<sup>^</sup> 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)

# POTENTIAL MARKET SIZE FOR CANADA (NEXT 2 YEARS)



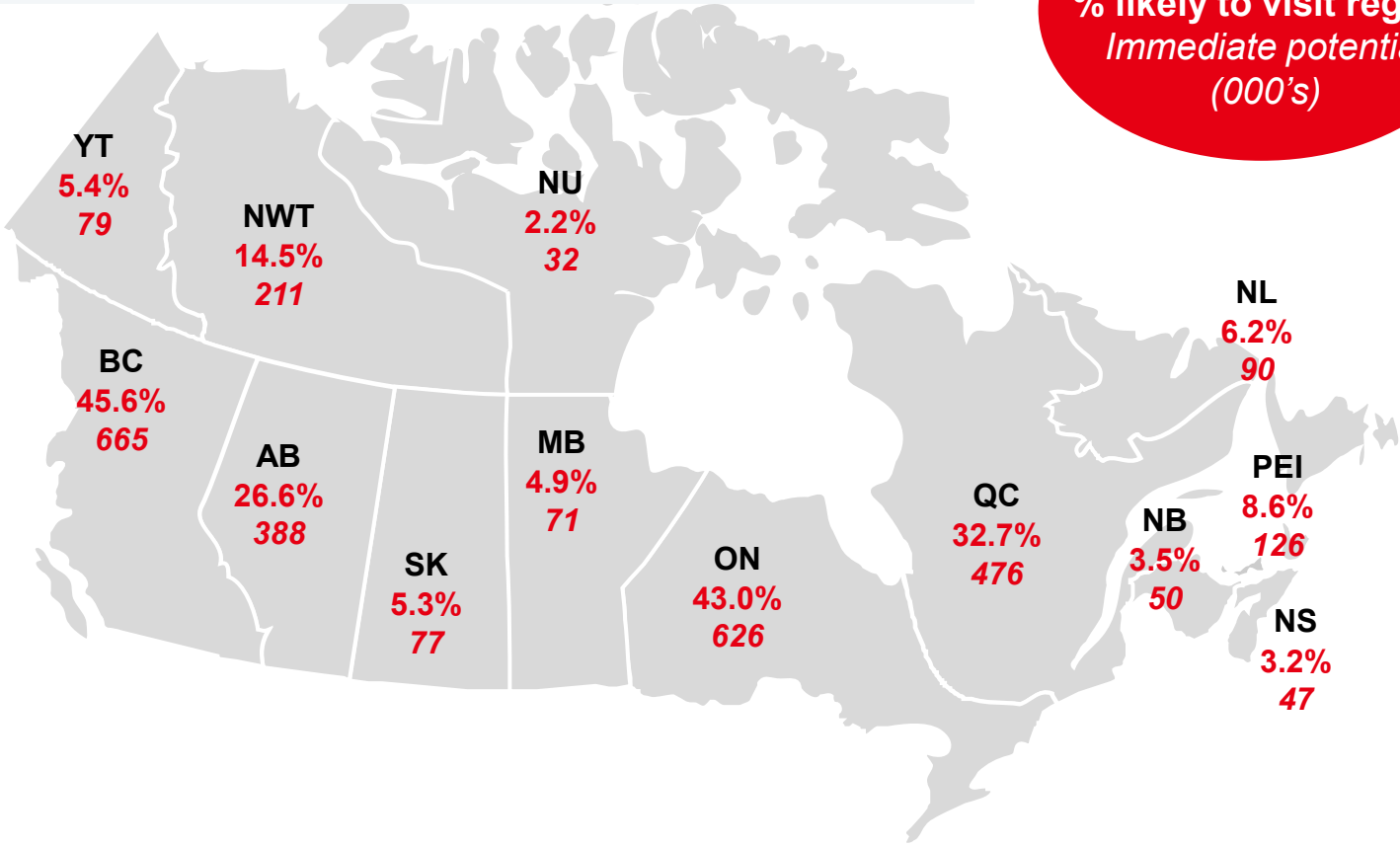
<sup>1</sup> Includes respondents likely to visit Canada for a trip of 1 to 3 nights, or a trip of 4 nights or more.  
Base: Target market for Canada = long-haul pleasure travellers (past 3 years or next 2 years) (n=1500); Immediate potential for Canada = dream to purchase stages for P2P for Canada (n=918)  
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 BY REGION

BC and Ontario have the potential to draw in over 600K Japanese travellers each over the next 2 years.

Immediate Potential for Canada: **1,455,500**

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=918)  
E2. 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)





# 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%	17%	14%
Alberta	4%	8%	10%	7%
Saskatchewan	1%	2%	2%	2%
Manitoba	0%	2%	2%	1%
Ontario	5%	10%	16%	13%
Quebec	3%	7%	12%	10%
New Brunswick	1%	1%	1%	1%
Nova Scotia	1%	1%	2%	1%
Prince Edward Island	1%	2%	4%	3%
Newfoundland & Labrador	1%	2%	2%	2%
Yukon	1%	2%	2%	2%
Northwest Territories	3%	3%	3%	4%
Nunavut	0%	1%	1%	1%

Base: Those in the dream to purchase stages of the path to purchase for Canada & definitely/likely to take a trip to Canada (n=918)  
E3a-m. During what time of year are you considering visiting [PROVINCE]? (Select all that apply)



Japanese travellers show a preference for the summer months, while fall is the second most popular time of year.



Whitehorse  
Yukon

Japan GTRP –  
December 2024

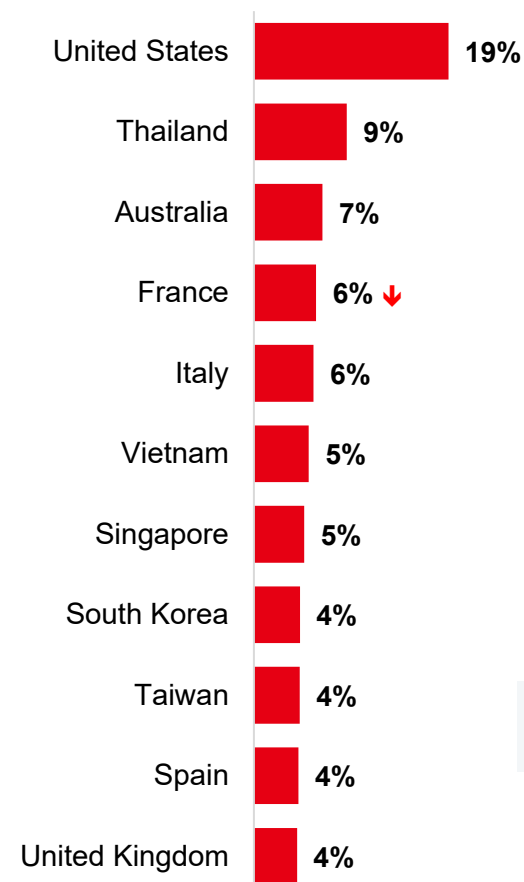


# CANADA VS. COMPETITORS



# UNAIDED DESTINATION CONSIDERATION (NEXT 2 YEARS)<sup>1</sup>

On an unaided basis, Canada is not a top destination that Japanese travellers are considering.



Canada receives:  
Total: 2% mentions



Tofino

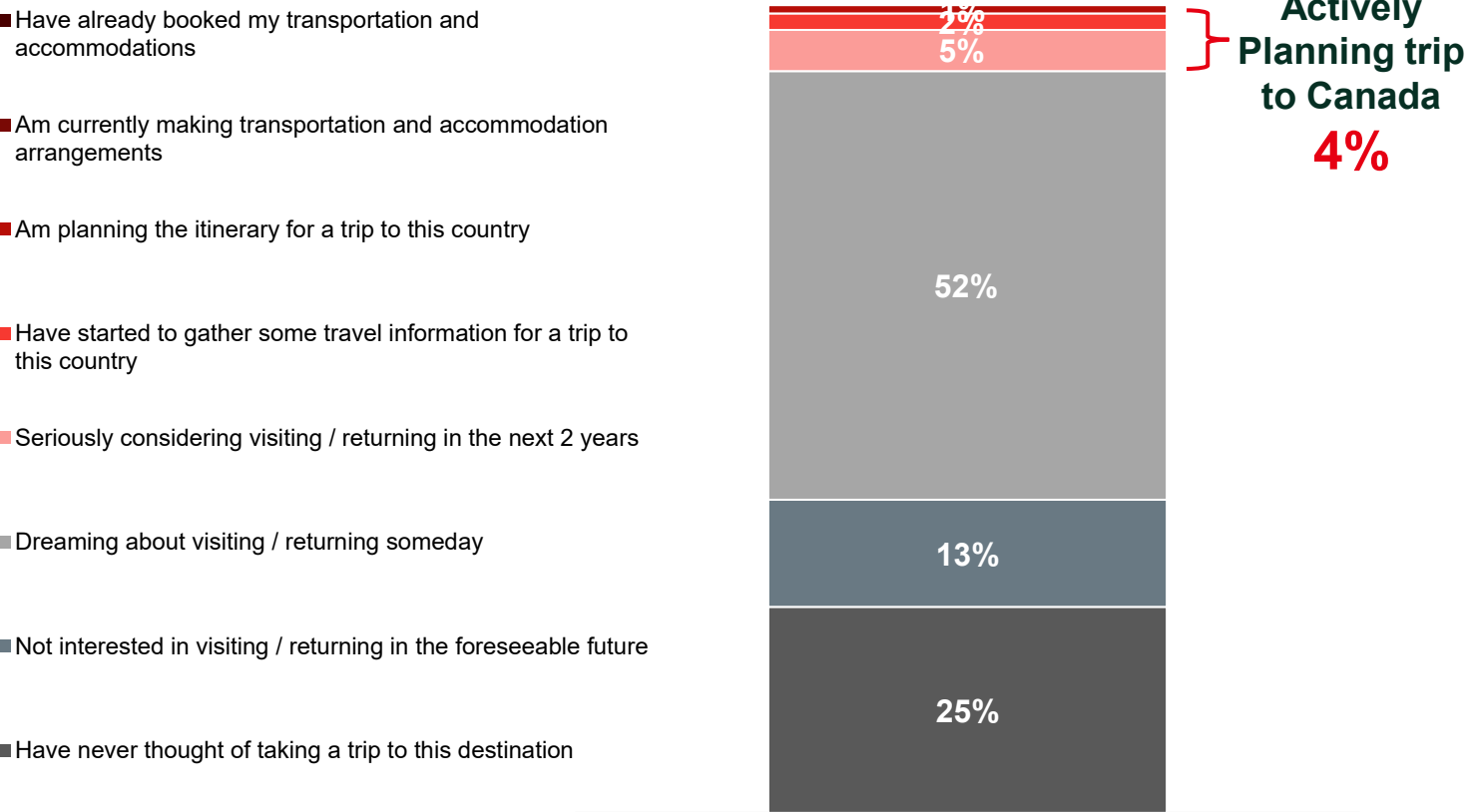
British Columbia

<sup>1</sup>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=1500)  
B1. You mentioned that you are likely to take long-haul holiday trip in the next 2 years. Which destinations are you seriously considering? (Please list up to 3 destinations)

↑ / ↓ = significantly higher/lower result (2024 vs. 2023)



# STAGE IN THE PURCHASE CYCLE FOR CANADA



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



↑ / ↓ = significantly higher/lower result (2024 vs. 2023)

12 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 Canada (n=1500)  
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)

Lake Louise  
Alberta

Japan GTRP – December 2024



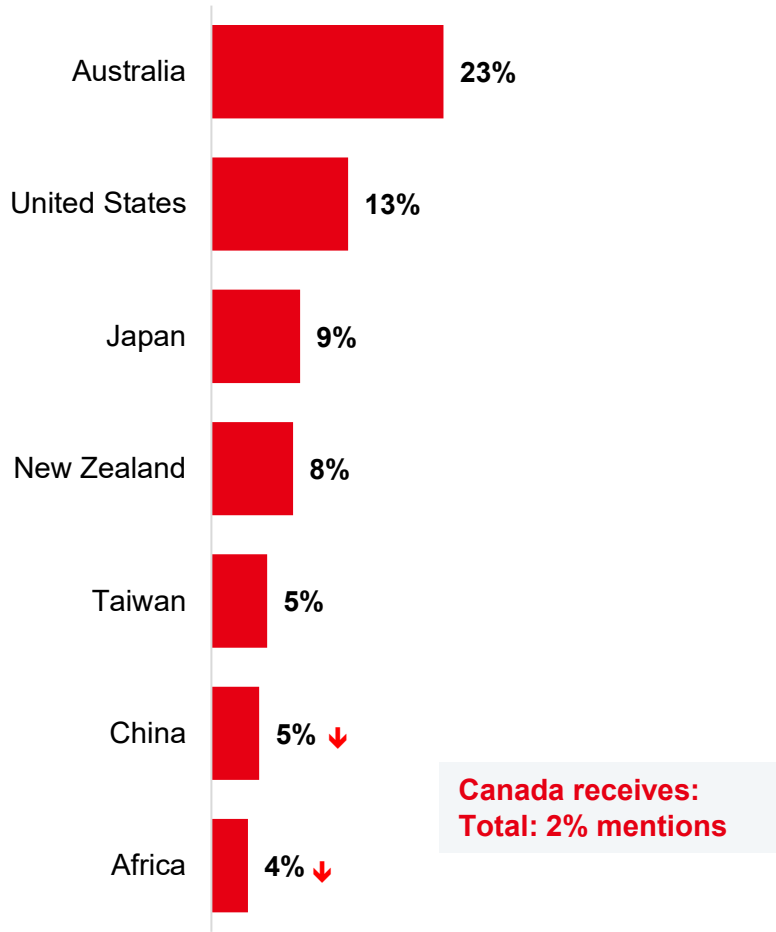
# INDIGENOUS TRAVEL



Carcross  
Yukon



# UNAIDED INDIGENOUS DESTINATION



↑ / ↓ = significantly higher/lower result (2024 vs. 2023)  
Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1500)  
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.



On an unaided basis, Canada receives low mentions as being an Indigenous tourism destination among Japanese travellers.



# INTEREST IN INDIGENOUS DESTINATIONS



Almost four in ten Japanese travellers are interested in participating in Indigenous experiences in Canada, with over one in ten being very interested.



 Kelowna  
British Columbia

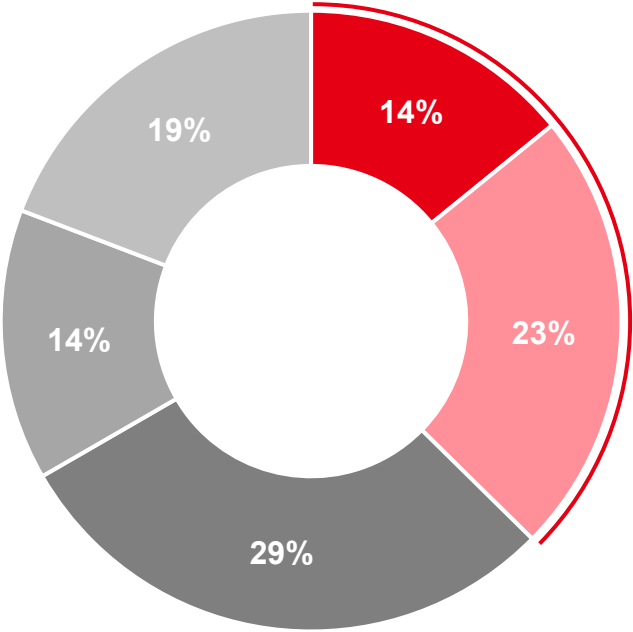
■ 5 - Very interested

■ 4

■ 3

■ 2

■ 1 - Not at all interested



4 or 5 (out of 5)  
**37%**

Note: respondents were asked either about interest in Indigenous destinations (C10) or factors to drive interest in Indigenous cultural experiences (C11)  
Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=770)  
C10. As you may or may not know, 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. How interested are you in participating in Indigenous cultural experiences and tourism activities in the following destinations?

# FACTORS TO DRIVE INTEREST IN INDIGENOUS CULTURAL EXPERIENCES

**Japanese travellers say that safety and comfort of the destination, as well as accessibility and ease of travel would increase their interest in Indigenous cultural experiences.**



Note: respondents were asked either about interest in Indigenous destinations (C10) or factors to drive interest in Indigenous cultural experiences (C11)  
Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=730)  
C11. What factors would increase your interest in participating in Indigenous cultural experiences and tourism activities in a destination? (Select up to 3)



# TRAVEL BEHAVIOURS

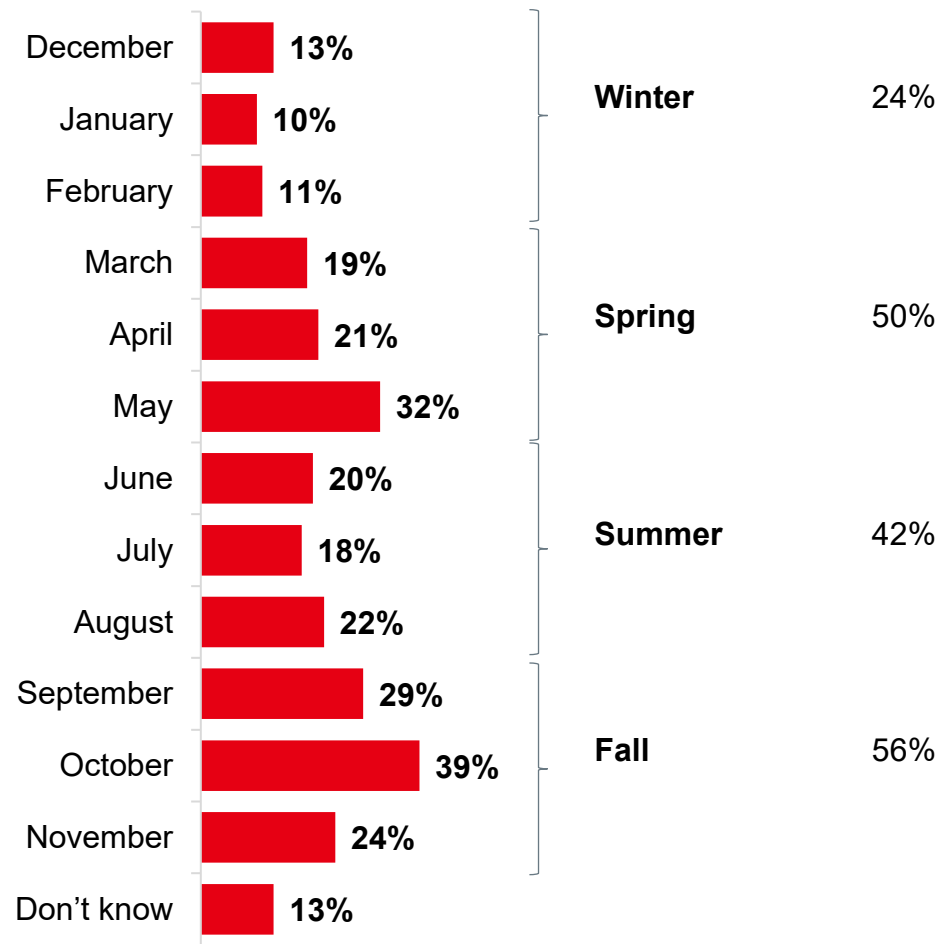


Montreal  
Quebec





# PREFERRED TIME OF YEAR FOR HOLIDAY TRIPS




Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1500)  
D1. In general, what time of year do you typically like to take holiday trips? Select all that apply



Fall is the preferred time to take holiday trips, followed by spring, with the most popular months for holiday trips being October and May.

# GENERAL ACTIVITIES INTERESTED IN (FULL LIST)

Top activities while on a holiday include trying local cuisine, natural attractions, nature walks, and historical archaeological or world heritage sites.

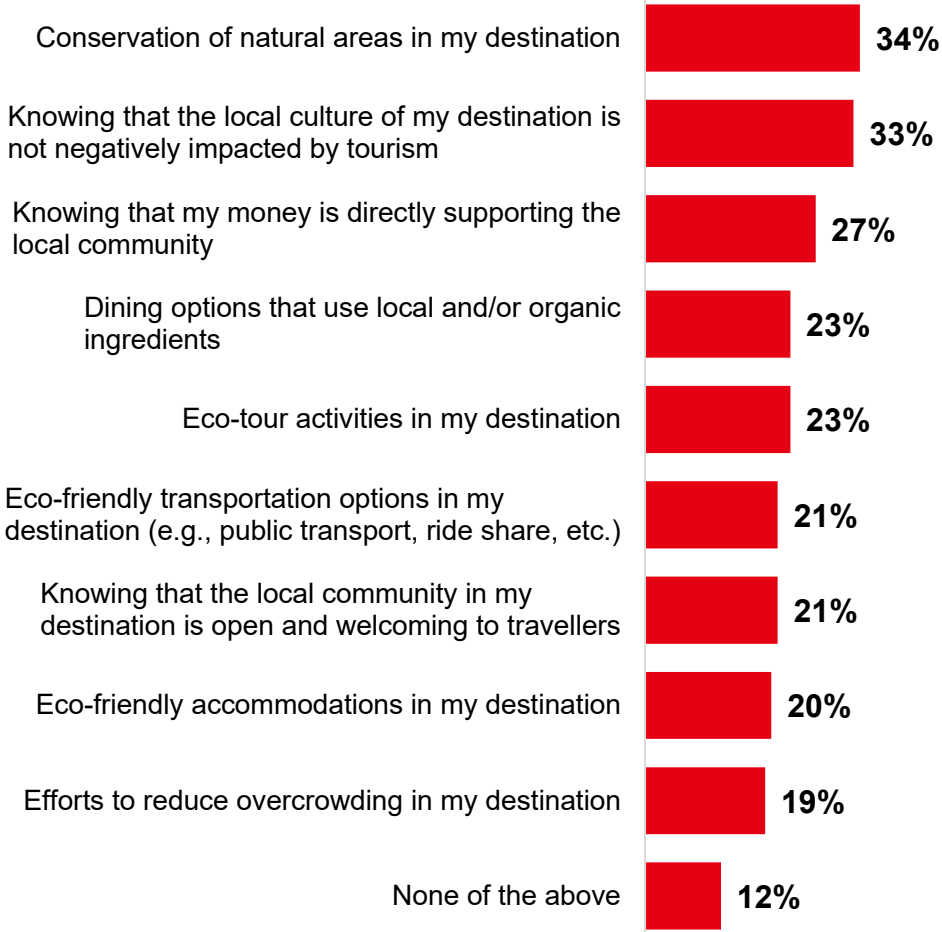
 Cup and Saucer Trail  
Ontario



Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1500)  
D4. In general, what activities or places are you interested in while on holiday? (Select all that apply)

# TOP 3 MOST IMPORTANT SUSTAINABILITY EFFORTS

The most important sustainability efforts are conservation of natural areas in their destination, knowing that the local culture of their destination is not negatively impacted by tourism, and knowing that their money is directly supporting the local community.



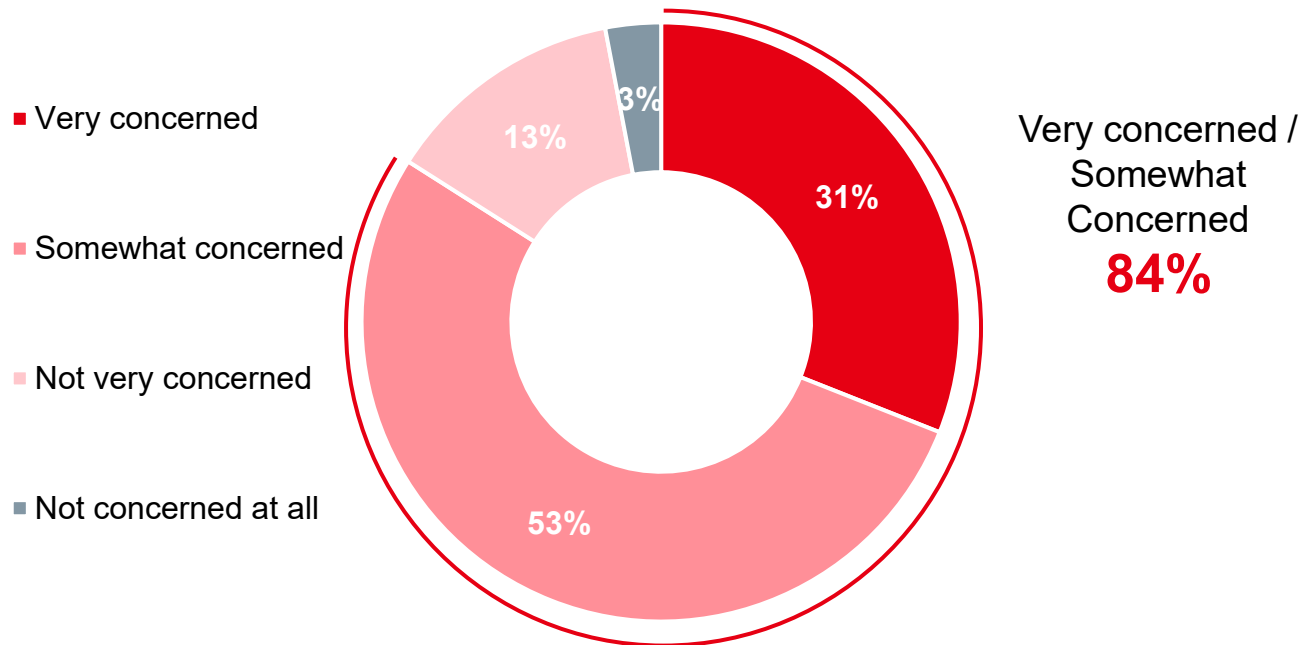
## Sustainable Travel Description

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”.

Note: respondents were asked either about most important sustainability efforts (D8) or barriers to sustainable travel (D9)  
Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=758)  
D8. What are the top 3 sustainability efforts that are most important to you when selecting a holiday destination? Select up to three choices.



# IMPACT OF EXTREME WEATHER EVENTS ON TRAVEL PLANS



**71%** state extreme weather events will **significantly or moderately impact** their future travel decisions in the next year

↑ / ↓ = significantly higher/lower result (2024 vs. 2023)

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1500)

D10. 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. How concerned are you about extreme weather events affecting your travel plans?

D15. To what extent do you expect extreme weather events to impact your future travel decisions in the next year?

**Majority of travellers are concerned about extreme weather impacting their travel plans, with seven in ten stating that extreme weather will impact their future travel decisions.**



Canadian Museum of Human Rights, Winnipeg  
Manitoba

Japan GTRP –  
December 2024



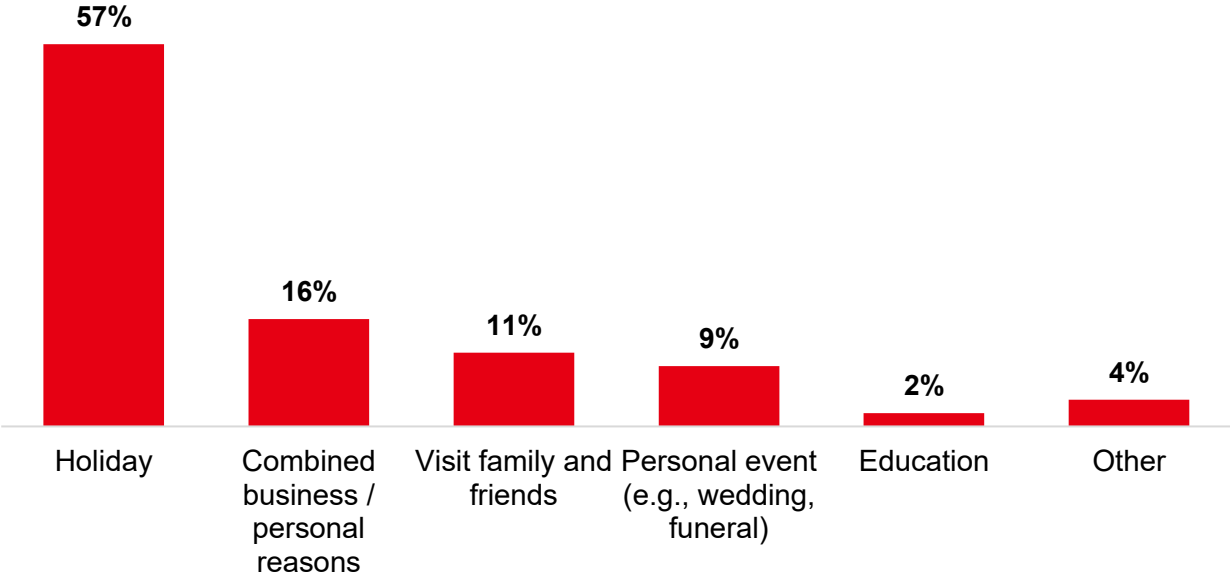
# MOST RECENT TRIP



Le Pays de la Sagouine  
New Brunswick



# MAIN PURPOSE OF RECENT TRIP



Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination past 3 years (n=62)  
F2. What was the main purpose of this trip? (Select one)



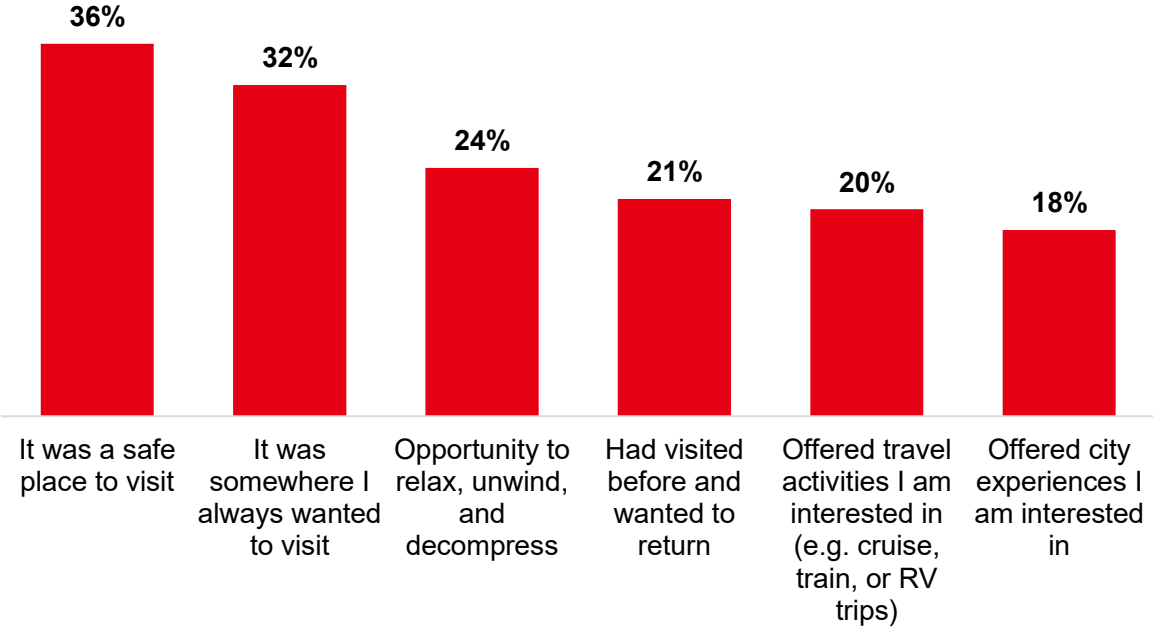
Almost six in ten Japanese travellers to Canada in the past three years were going on a holiday trip.



Nahanni National Park Reserves  
Northwest Territories



# FACTORS IN CHOOSING DESTINATION FOR RECENT TRIP (TOP 6)



Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination past 3 years, Took a holiday (n=35\*)  
F3. Which of the following factored into your choice of destination for this trip? (Select all that apply)  
\*Small base size, interpret with caution (n<50)

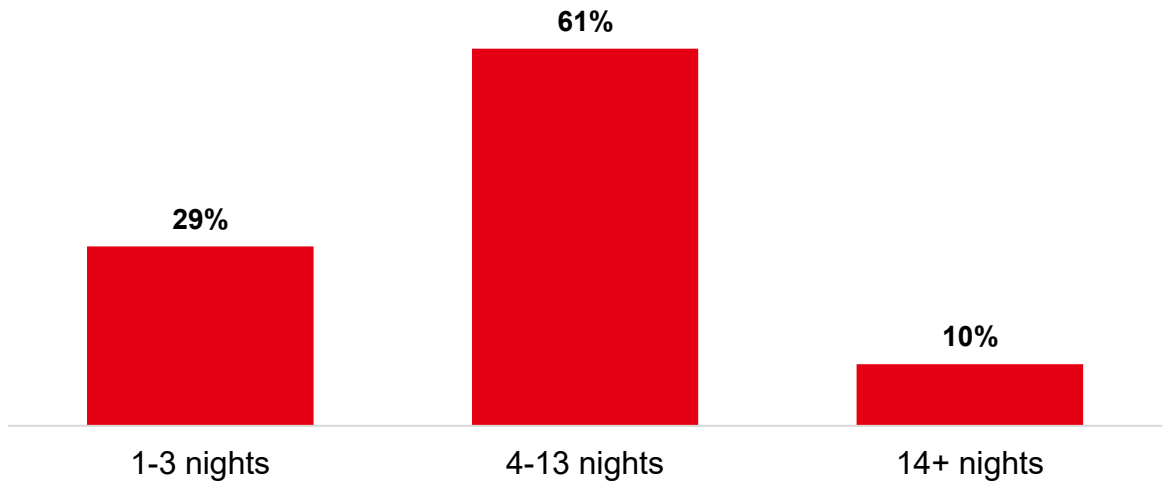
The top factors for choosing to visit Canada for their most recent trip were safety, the destination being somewhere they always wanted to visit, and to relax.



Fundy Trail Provincial Park  
New Brunswick



# NIGHTS SPENT DURING RECENT TRIP



Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination past 3 years (n=62)  
F4. How many nights did you spend in this destination?

Six in ten Japanese travellers to Canada stayed for 4-13 nights.

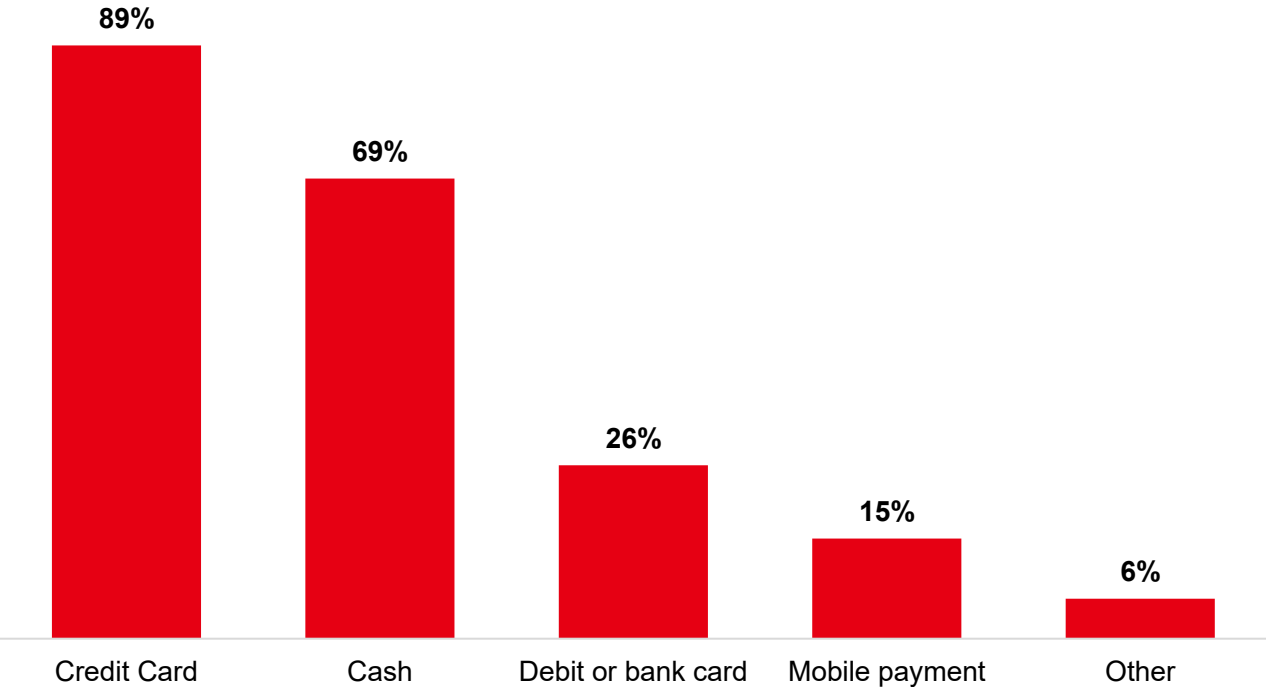


Barren Canyon, Algonquin Park  
Ontario

Japan GTRP –  
December 2024



# PAYMENT METHODS FOR RECENT TRIP



Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination past 3 years (n=62)  
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%).



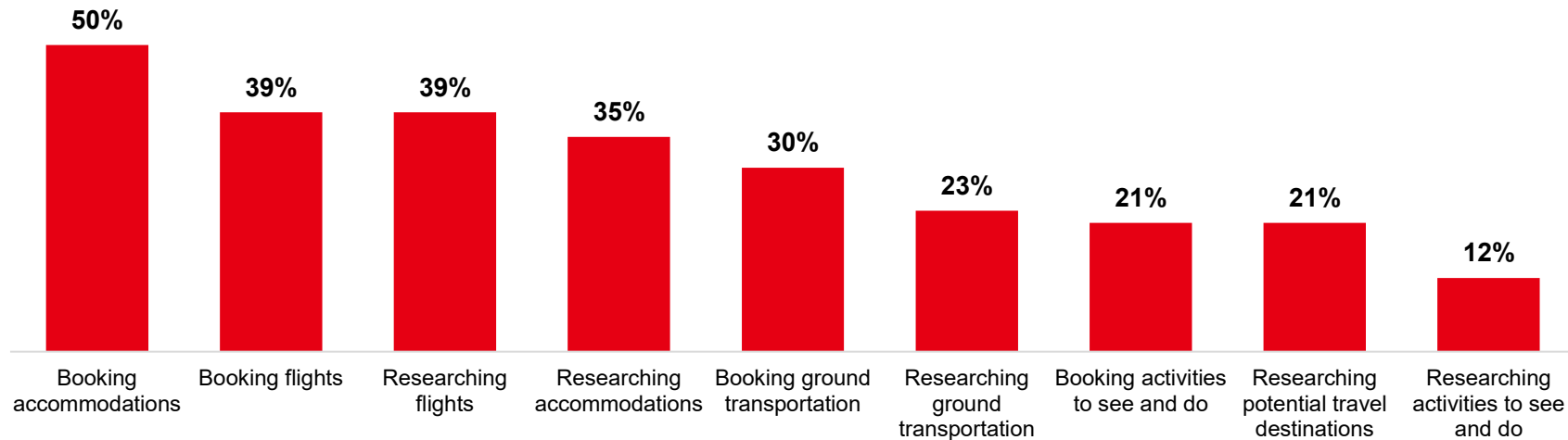
The most common payment method Japanese travellers used for their most recent trip to Canada was credit card, followed by cash.





# TRAVEL AGENTS/TOUR OPERATOR USAGE FOR RECENT TRIP (AMONG THOSE WHO USED A TRAVEL AGENT/TOUR OPERATOR)

**57%** used a travel agent



Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination past 3 years, Used a Travel Agent/Tour Operator (n=33\*)  
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?  
\*Small base size, interpret with caution (n<50)

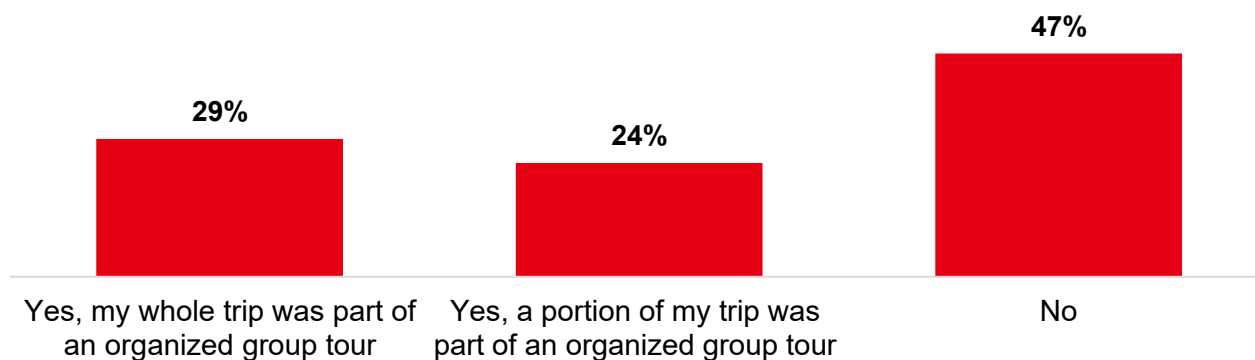
**Almost six in ten recent travellers to Canada used a travel agent, most likely for booking accommodations.**

Twin Falls Lodge  
Saskatchewan

Japan GTRP –  
December 2024



# ORGANIZED GROUP TOUR FOR RECENT TRIP



Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination past 3 years (n=62)  
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?

**Three in ten travellers to Canada in the past three years used an organized group tour for their whole trip, and another one in four used one for a portion of their trip.**



Saskatoon

Saskatchewan

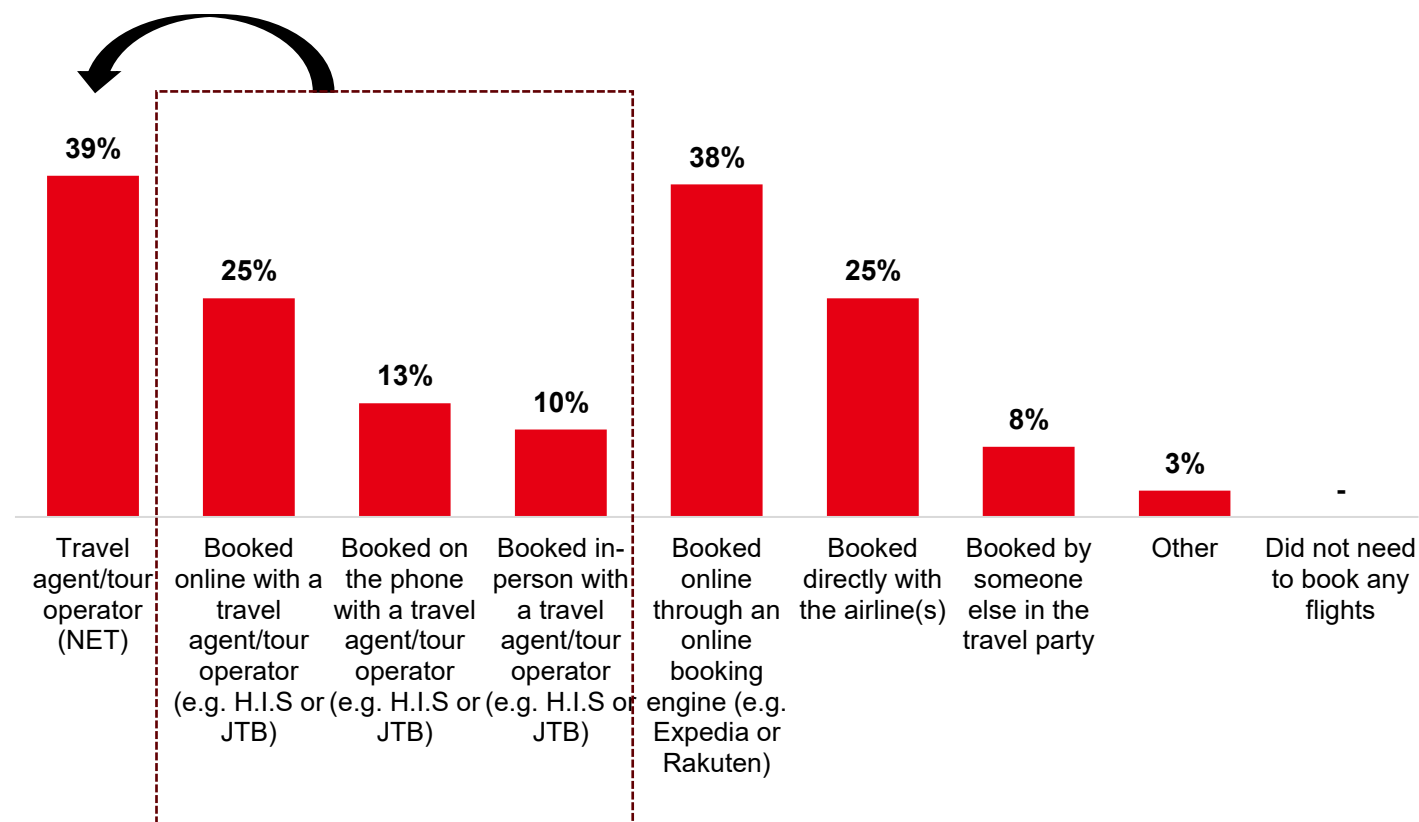
Japan GTRP –  
December 2024



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# BOOKING FLIGHTS FOR RECENT TRIP



Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination past 3 years (n=62)  
F12. How did you book your flight for this trip? (Select all that apply)

Using a travel agent or tour operator, followed by booking through an online booking engine were the most popular methods to book flights among Japanese travellers.

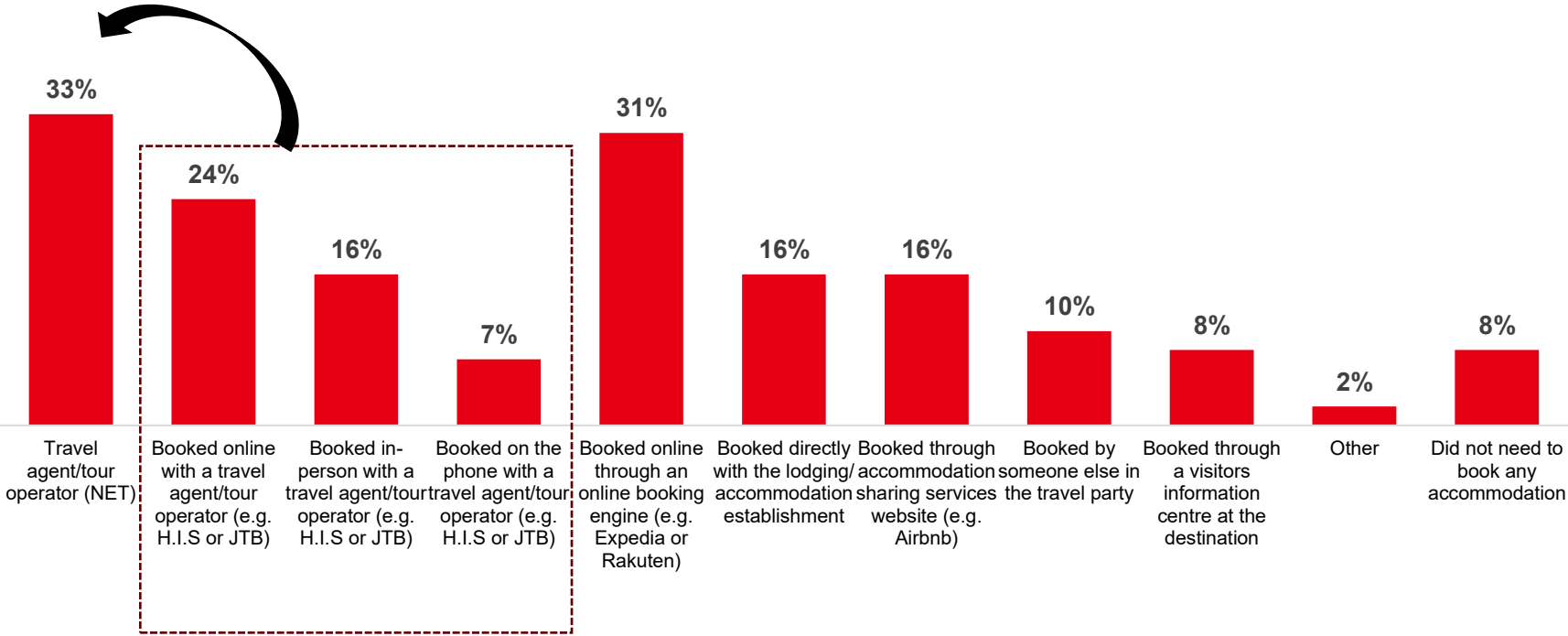


Montmorency Falls Park, Quebec City  
Quebec

Japan GTRP –  
December 2024



# BOOKING ACCOMMODATIONS FOR RECENT TRIP

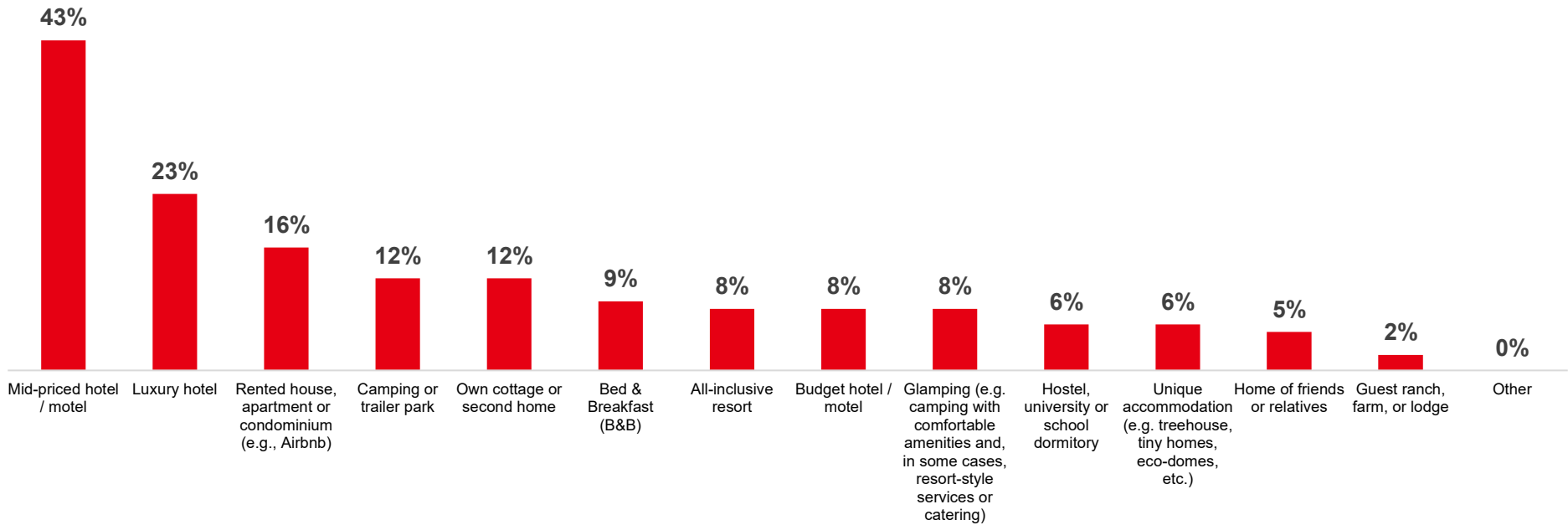


Booking through a travel agent or tour operator or through an online booking engine were also the most popular ways to book accommodations.

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to Canada past 3 years (n=62)  
F13. How did you book your accommodation for this trip? (Select all that apply)



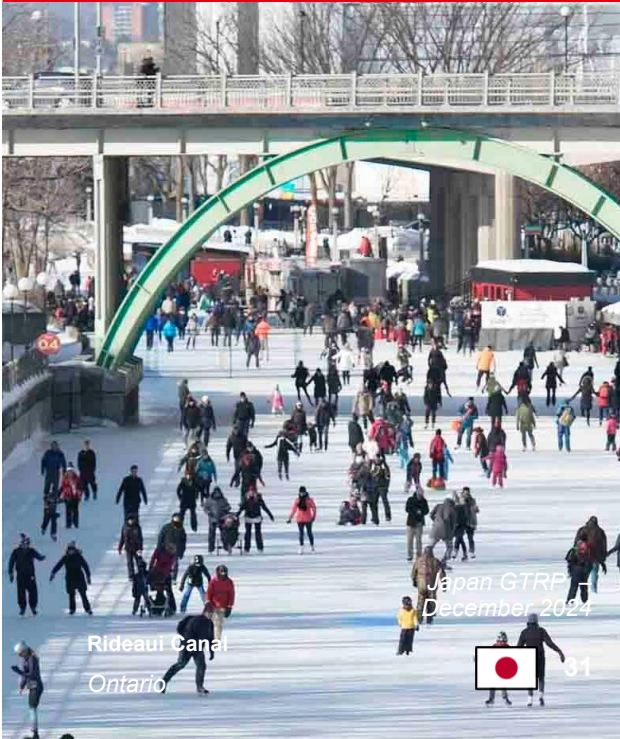
# TYPE OF ACCOMMODATIONS FOR RECENT TRIP



Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to Canada past 3 years, Booked Accommodations (n=57)  
F14. Which type of accommodation did you stay in during this trip? (Select all that apply)



Over four in ten Japanese travellers to Canada stayed in a mid-priced hotel or motel.



# THANK YOU

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

