

2025 GLOBAL TRAVELLER RESEARCH PROGRAM

JAPAN HIGHLIGHTS REPORT



Canada



Trout River 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

December 1st – 15th, 2025



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
Highly Engaged Guest (HEG) Audience:	855
Other travellers:	645
Total sample size:	1500

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



Consideration for Canada continues to be low among Japanese travellers, with next 2-year immediate potential for Canada being 1.5M. That said, the current geopolitical climate in Canada has a positive impact on likelihood to visit, with 20% stating they are more likely to visit Canada as a result.



Potential visitors to Canada are more likely to consider a visit during the summer months, followed by fall, with Ontario and British Columbia accounting for the highest number of potential visitors.



Japanese travellers are most likely to base an entire holiday around historical or world heritage sites, trying local food and drink, and natural attractions. They are also interested in nature walks and shopping for souvenirs.



Canada is not seen as a top Indigenous destination for Japanese travellers, who express that safety and comfort of the destination, as well as accessibility and ease of travel would increase their interest in Indigenous cultural experiences.



The use of AI is common and has increased among all Japanese travellers, though travel agents continue to be the most common way to book flights and accommodations.

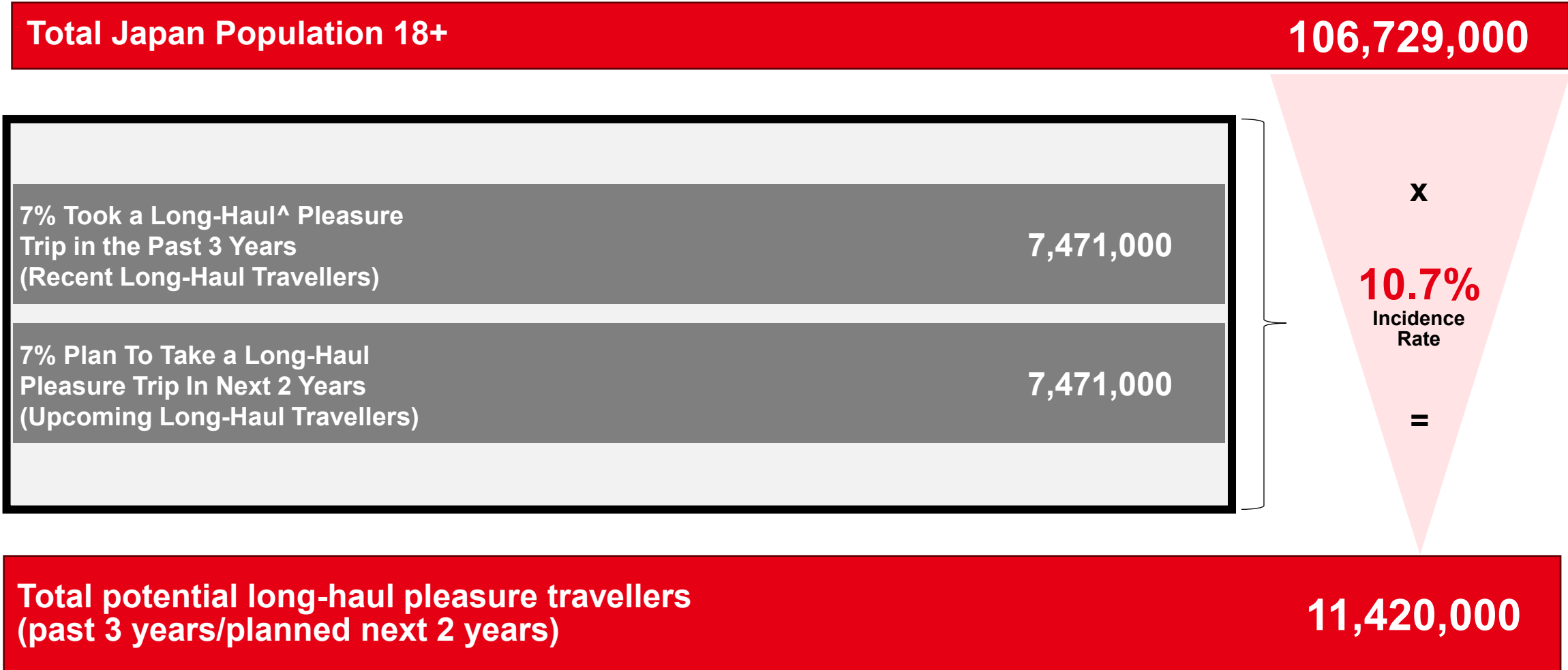
MARKET SIZING



Killarney Provincial Park
Ontario



MARKET SIZING – LONG-HAUL TRAVELLERS



^ 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)

Total potential **Long-Haul Pleasure** travellers aged 18 years or more



Target Market for Canada
(Those in the dream to purchase stages of the path to purchase for Canada)

X

55.6% ↓

=

Size of the Target Market



Immediate Potential for Canada
(Will definitely/very likely visit Canada in the next 2 years¹)

X

24.4%

=

Immediate Potential



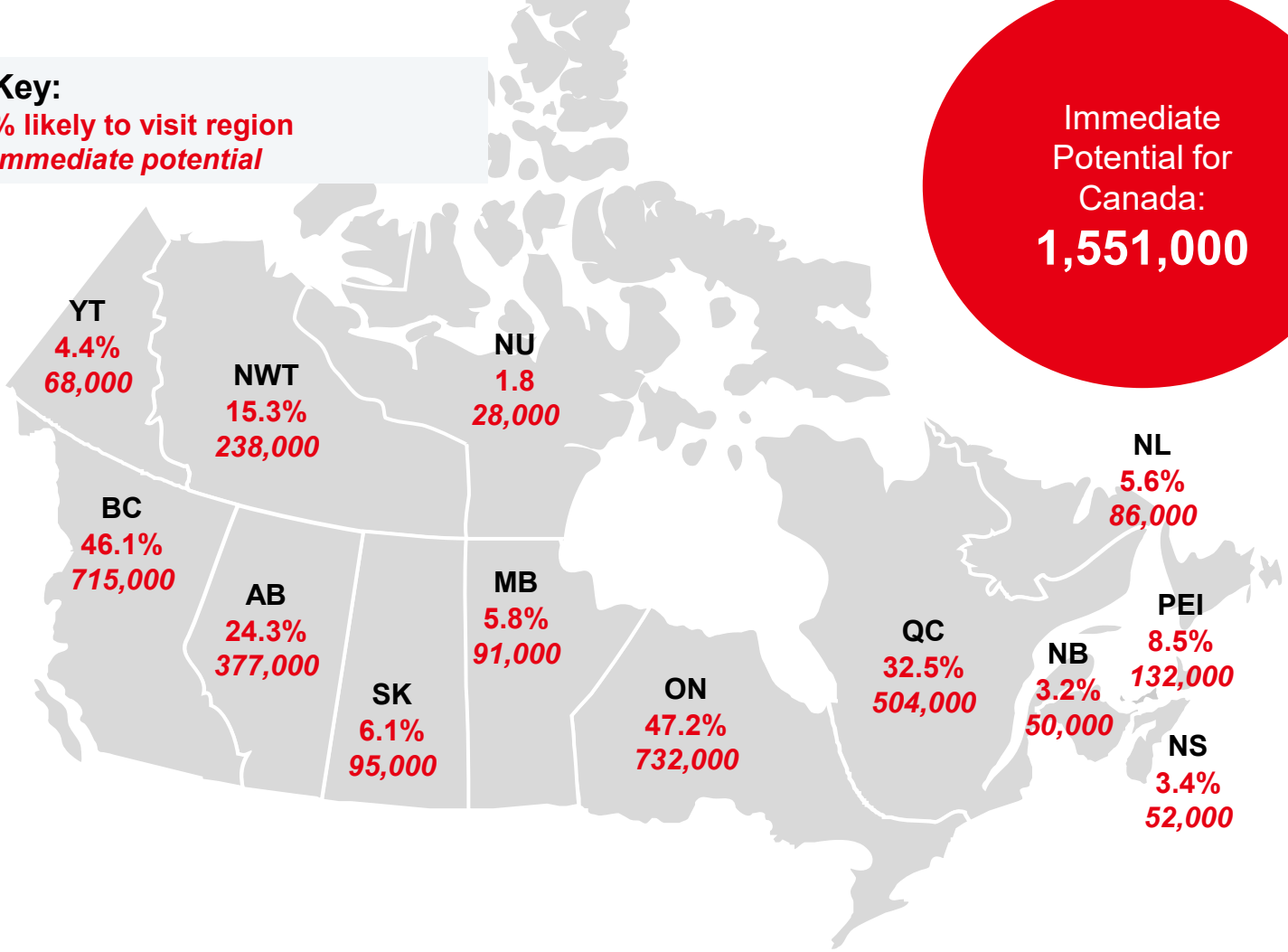
¹ Includes respondents likely to visit Canada for a trip of 1 to 3 nights, or a trip of 4 nights or more.
Base: Target market for Canada = long-haul pleasure travellers (past 3 years or next 2 years) (n=1500); Immediate potential for Canada = dream to purchase stages for P2P for Canada (n=842)
C1. Which 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

Ontario and BC have the potential to draw in over 700K Japanese travellers each over the next 2 years.

Immediate Potential for Canada:
1,551,000

Key:
% likely to visit region
Immediate potential



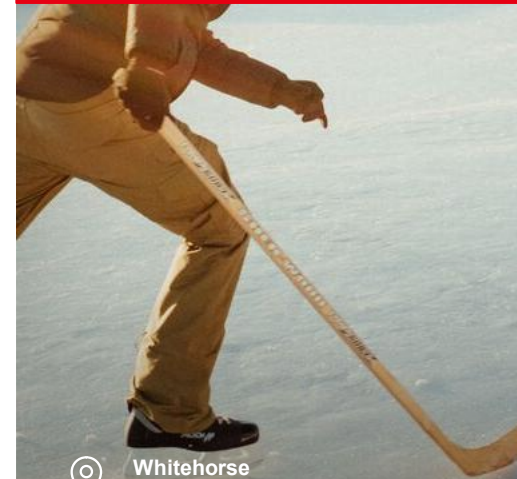
Nunavut


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=842)
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%	11%	17%	13%
Alberta	3%	6%	11%	8%
Saskatchewan	1%	3%	3%	1%
Manitoba	1%	3%	3%	1%
Ontario	4%	11%	18%	14%
Quebec	2%	7%	14%	10%
New Brunswick	0%	1%	2%	1%
Nova Scotia	1%	1%	2%	1%
Prince Edward Island	1%	3%	4%	3%
Newfoundland & Labrador	1%	3%	2%	1%
Yukon	1%	1%	2%	1%
Northwest Territories	3%	3%	4%	4%
Nunavut	0%	1%	1%	0%

Japanese travellers show the strongest interest in summer months followed by fall, with Ontario and BC being the top destinations for both seasons.



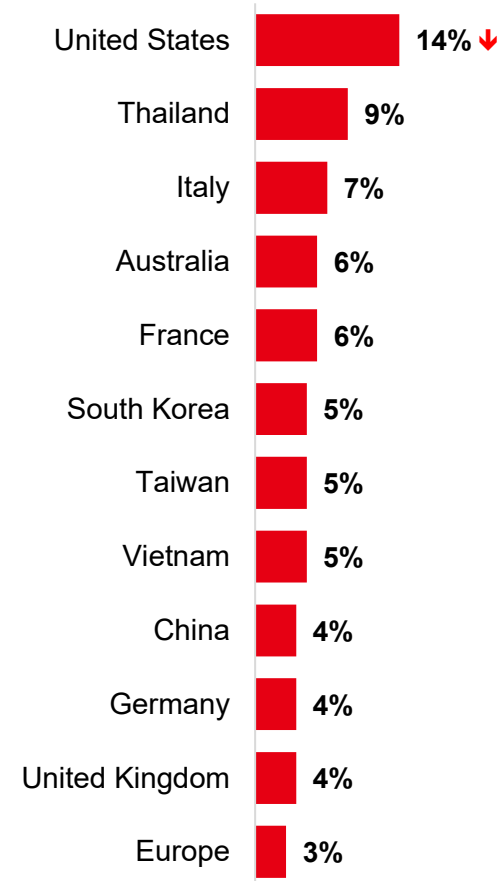
 Whitehorse
Yukon

Japan GTRP –
December 2025

Base: Those in the dream to purchase stages of the path to purchase for Canada & definitely/likely to take a trip to Canada (n=842) E3a-m. During what time of year are you considering visiting [PROVINCE]? (Select all that apply)

CONSIDERING CANADA AS A TRAVEL DESTINATION

UNAIDED DESTINATION CONSIDERATION (NEXT 2 YEARS)¹



**Canada receives:
Total: 2% mentions**

Canada continues to be not top of mind among Japanese travellers, with US consideration also declining compared to 2024.

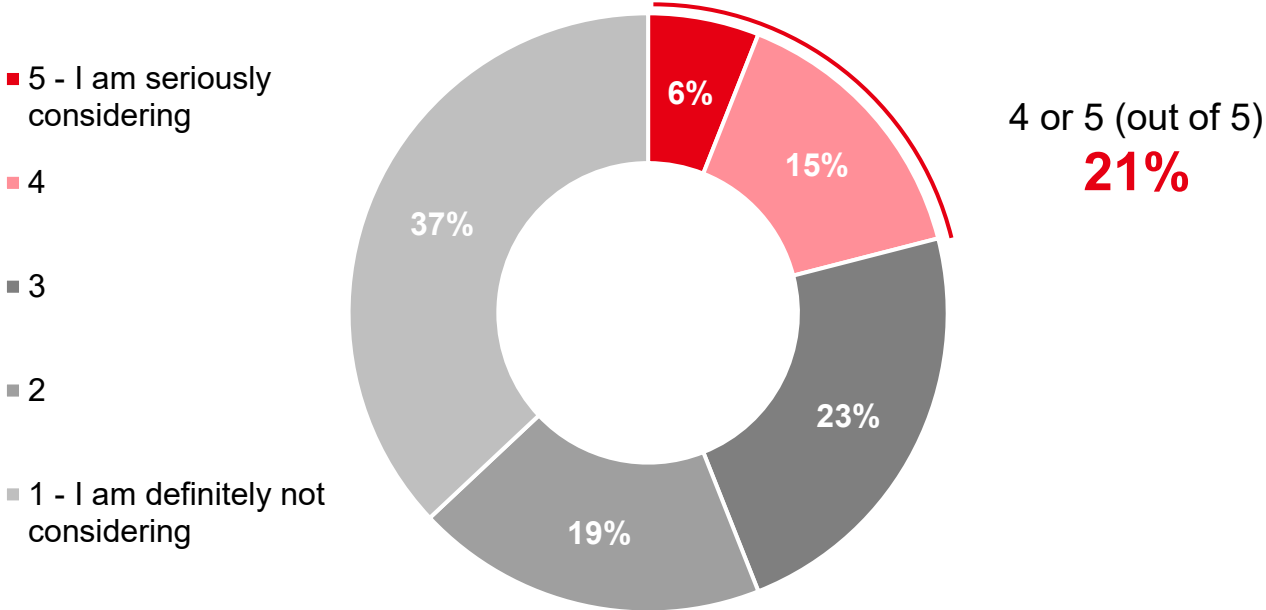


Tofino
British Columbia

¹ 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 (2025 vs. 2024)

AIDED CONSIDERATION FOR CANADA (NEXT 2 YEARS)



Two in ten Japanese travellers would consider visiting Canada in the next 2 years.

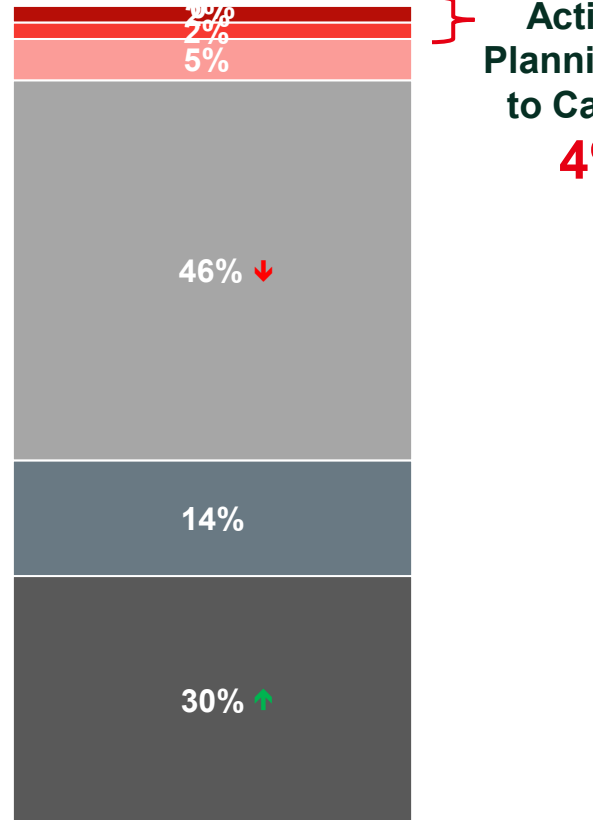


↑ / ↓ = significantly higher/lower result (2025 vs. 2024)

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1500)
 C2. You may have already mentioned this before, but would you consider visiting each of the following destinations in the next 2 years?
 Please use a 5-point scale where 1 means 'I am definitely not considering' and 5 means 'I am seriously considering'.

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 **4%**

Only four percent of Japanese travellers are actively planning a trip to Canada, consistent with scores from 2024.

↑ / ↓ = significantly higher/lower result (2025 vs. 2024)

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 vacation trip? (Select one for each)

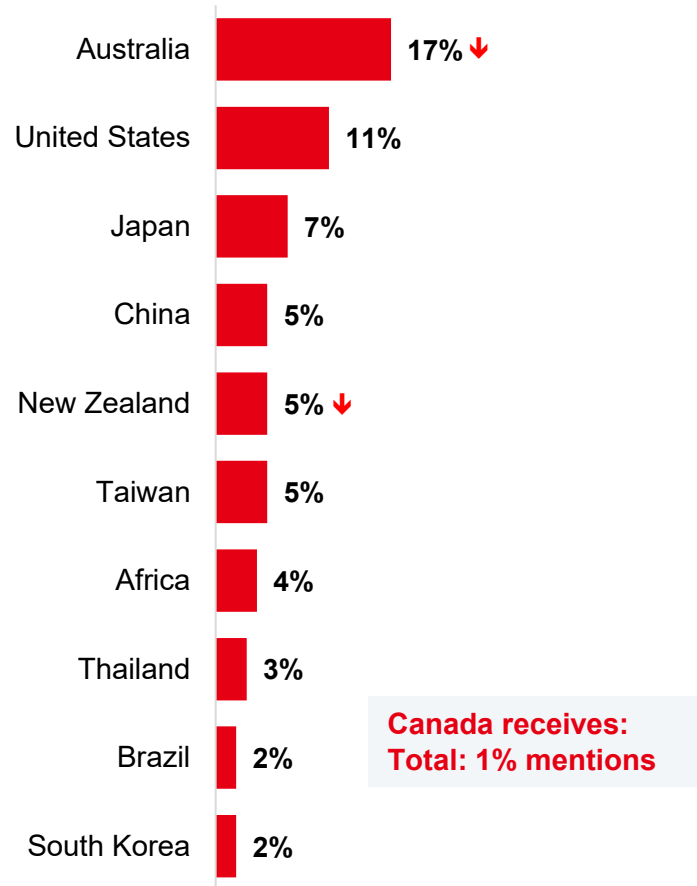
INDIGENOUS TRAVEL



Carcross
Yukon



UNAIDED INDIGENOUS DESTINATION



Canada is not top of mind as an Indigenous tourism destination among Japanese travellers. Mentions for Australia and New Zealand have declined compared to 2024.

↑ / ↓ = significantly higher/lower result (2025 vs. 2024)

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 Europe, North Africa and the Mediterranean.)

[DESCRIPTION] Please note: You do not have to limit your responses to destinations you are considering for a holiday trip.



INTEREST IN CANADA AS AN INDIGENOUS DESTINATION

One third of Japanese travellers are interested in participating in Indigenous experiences in Canada

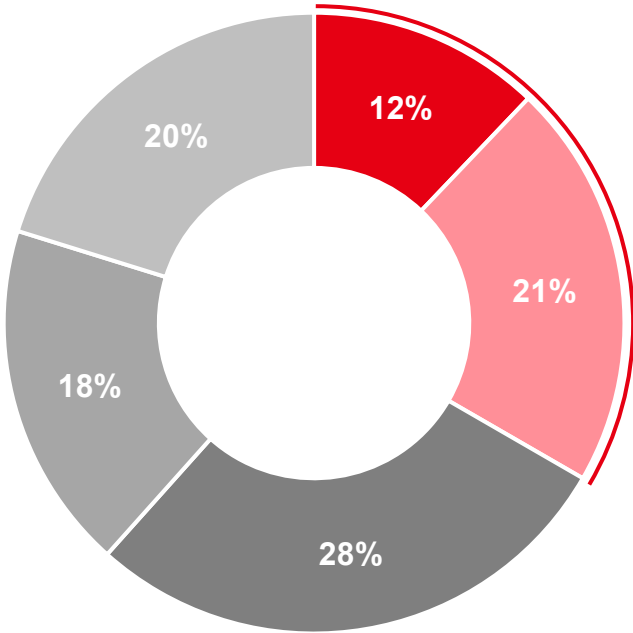
5 - Very interested

4

3

2

1 - Not at all interested



4 or 5 (out of 5)
33%

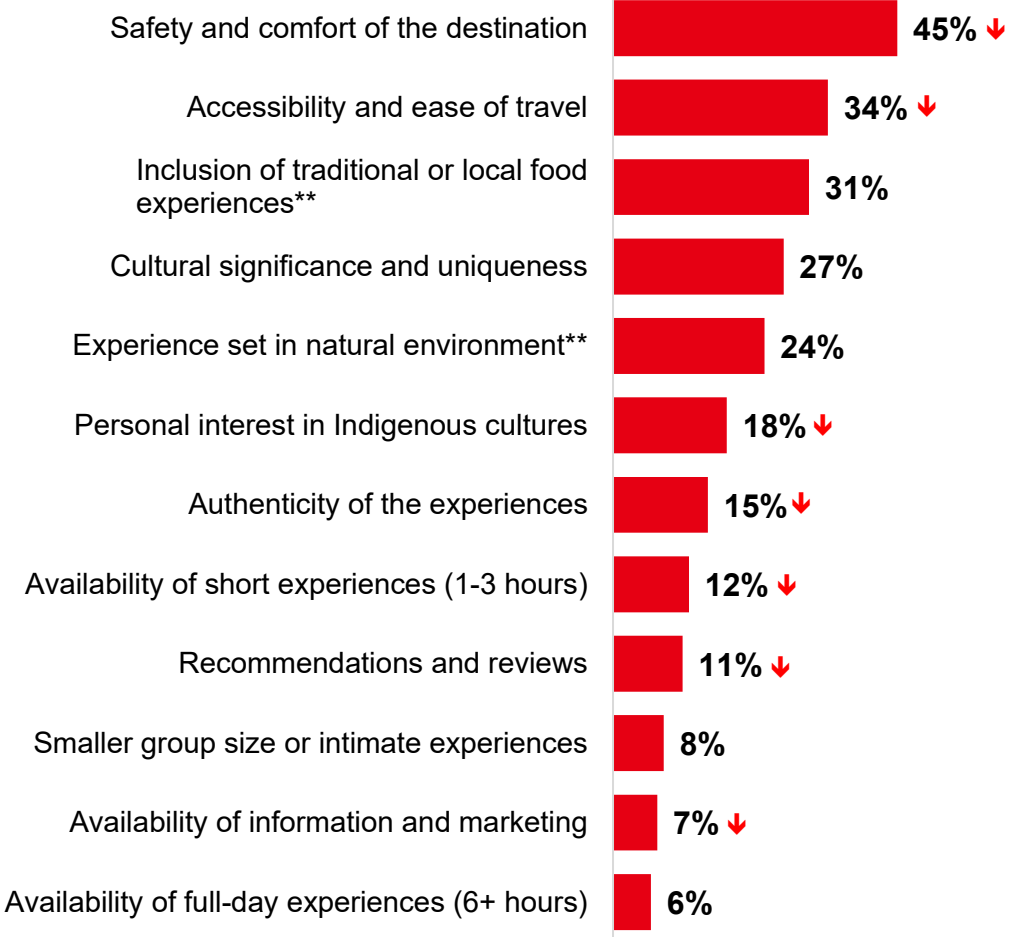
Note: respondents were asked either about interest in Indigenous destinations (C10) or factors to drive interest in Indigenous cultural experiences (C11)
 Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=724)
 C10. As you may or may not know, Indigenous peoples are descendants of 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?

↑ / ↓ = significantly higher/lower result (2025 vs. 2024)



FACTORS TO DRIVE INTEREST IN INDIGENOUS CULTURAL EXPERIENCES

Safety and comfort, followed by accessibility and ease of travel, are the primary drivers of interest in Indigenous cultural experiences, though mentions across many factors have declined year over year.



Victoria
British Columbia

**New statement added in 2025
 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

FARINE
FIVE ROSES



Montreal
Quebec



TOP 10 TRIP ANCHORS ACTIVITIES

30%

Historical, Archaeological or World Heritage Sites

30%

Trying Local Food and Drink

29%

Natural Attractions

21%

Nature Walks

19%

Northern Lights

16%

Shopping for Items that Help Me Remember my Trip

14%

Art Galleries or Museums

14%

Culinary Tours or Cooking Classes

14%

Local Markets

11%

Autumn Colours



Japanese travellers are most likely to base an entire holiday around historical or world heritage sites, trying local food and drink, or natural attractions.



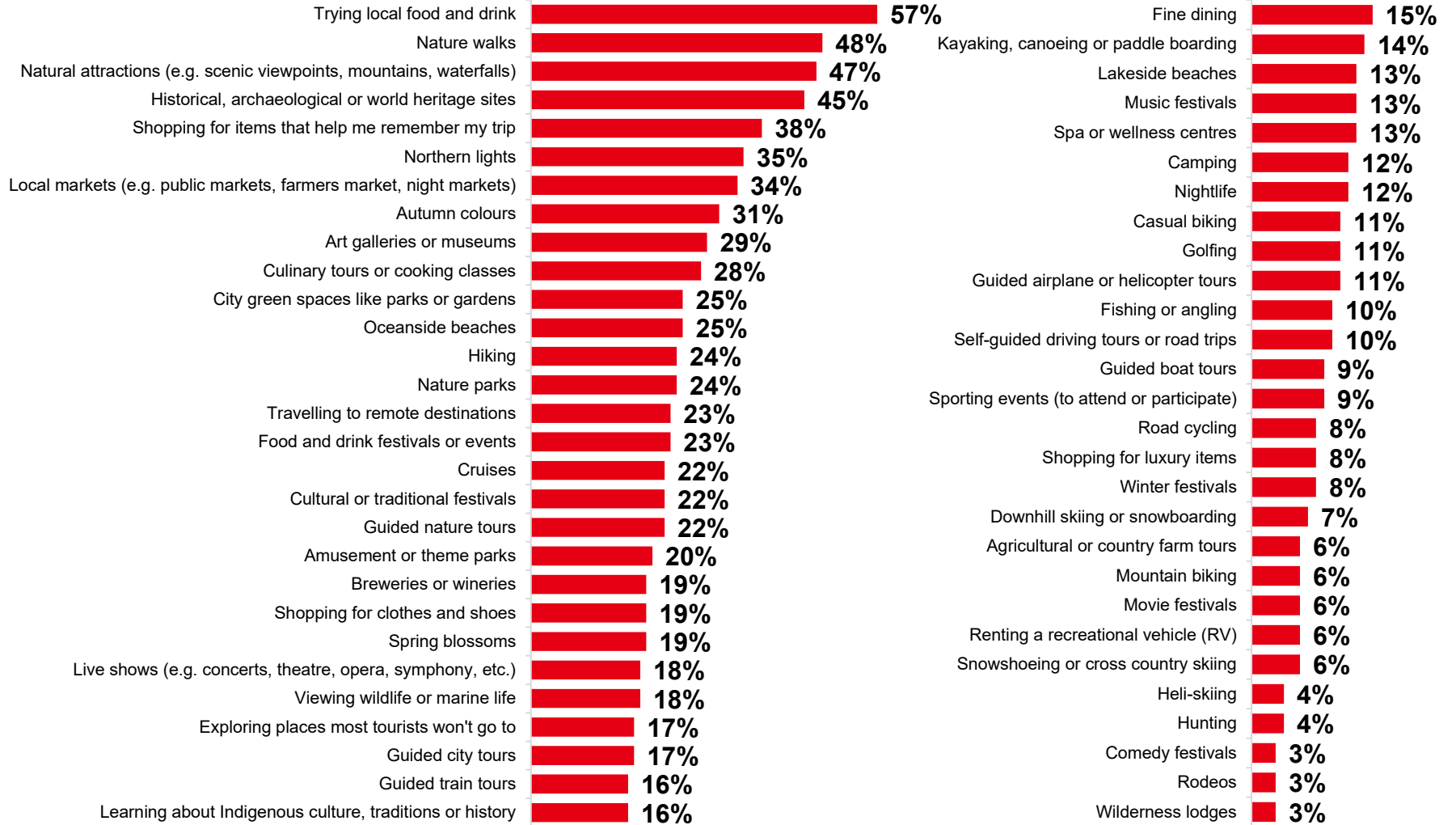
Winnipeg
Manitoba

Japan GTRP –
December 2025



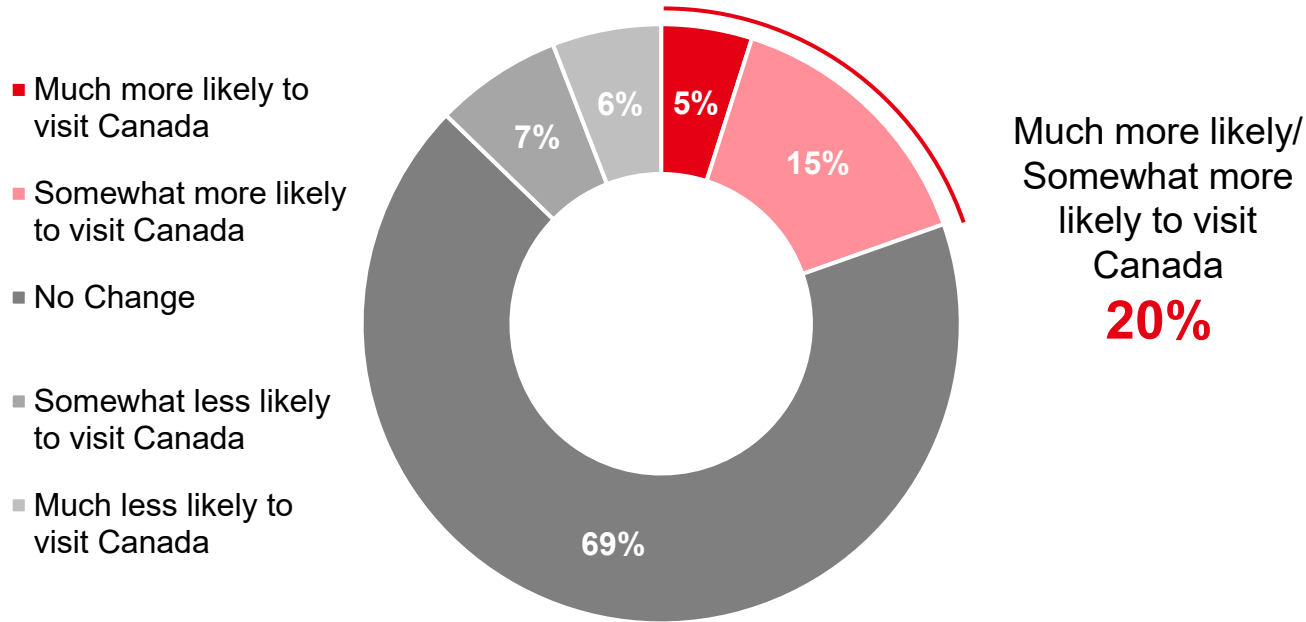
GENERAL ACTIVITIES INTERESTED IN (FULL LIST)

Top activities when on a holiday include trying local food and drink, nature walks, natural attractions, and historical or archaeological sites.



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)

STATED IMPACT OF GEOPOLITICAL CLIMATE ON VISITING CANADA



Geopolitical Climate Description

Geopolitical climate can include factors such as politics, international relations, trade disputes, or global conflicts.

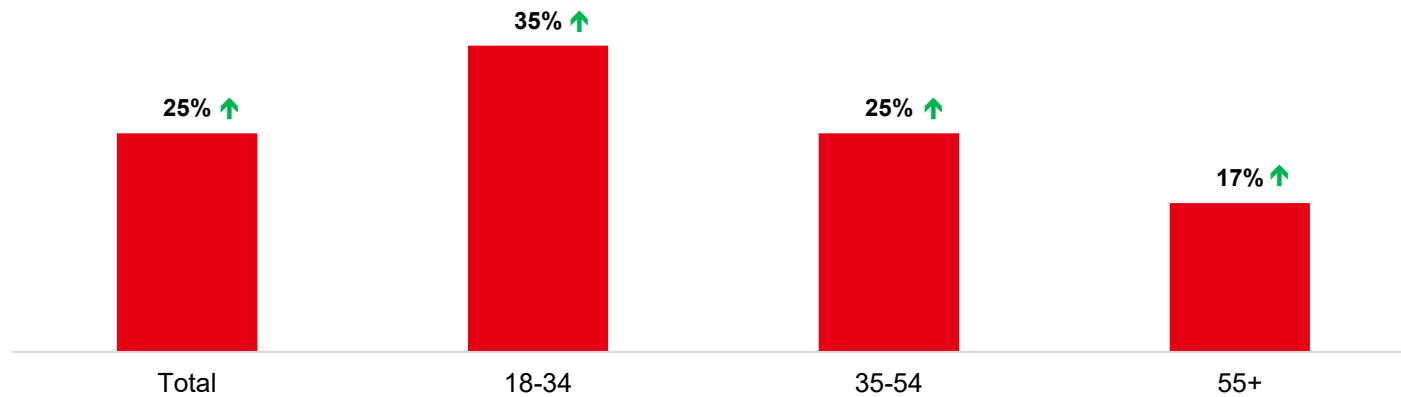
Note: respondents were asked either about decision for which airline to fly with (D18) or stated impact of geopolitical climate on visiting Canada (E16)
 Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=737)
 E16. How does the current geopolitical climate affect your likelihood of visiting Canada?



Two in ten Japanese travellers feel that the geopolitical climate would make them more likely to visit Canada, with only 5% stating it would make them much more likely to visit.



USAGE OF AI TOOLS TO PLAN TRIPS: BY AGE



↑ / ↓ = significantly higher/lower result (2025 vs. 2024)

Note: Question wording was updated in 2025 to include "booking a trip"
 Base: Long-haul pleasure travellers (past 3 years or next 2 years) 2025 (n=1517); 2025 18-34 (n=564); 2025 35-54 (n=529); 2025 55+ (n=424)
 D14. Have you ever used an AI tool (e.g. ChatGPT or Bard) to research, plan or book a trip?

AI adoption in travel planning is growing among Japanese travellers, particularly among younger audiences, where usage exceeds one third.



Montmorency Falls Park, Quebec City
Quebec

Japan GTRP –
December 2025

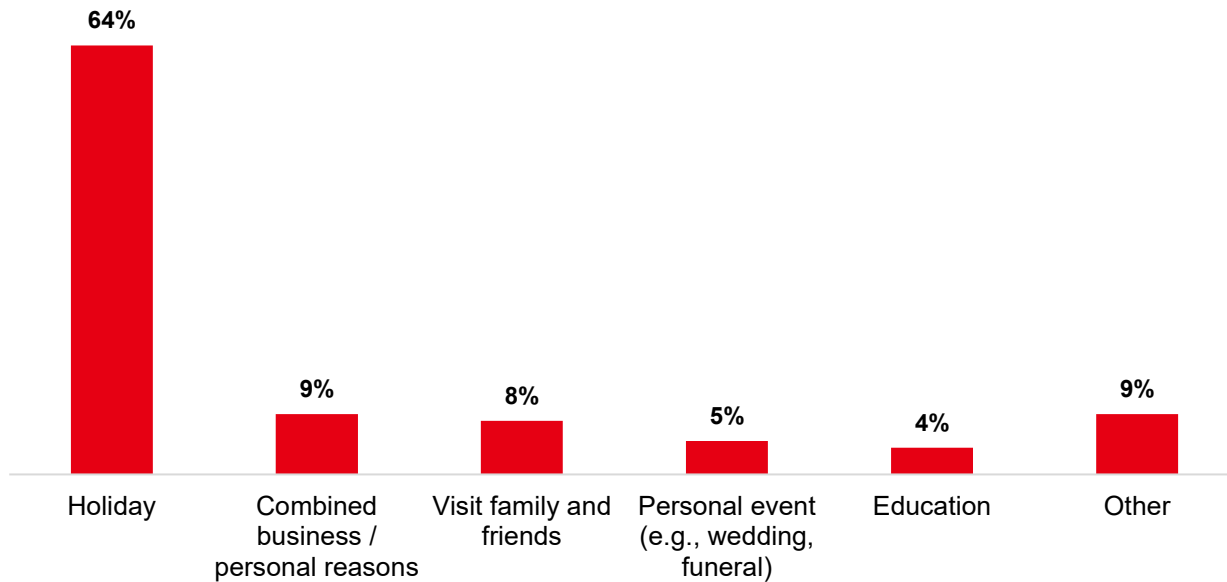
MOST RECENT TRIP TO CANADA



Le Pays de la Sagouine
New Brunswick



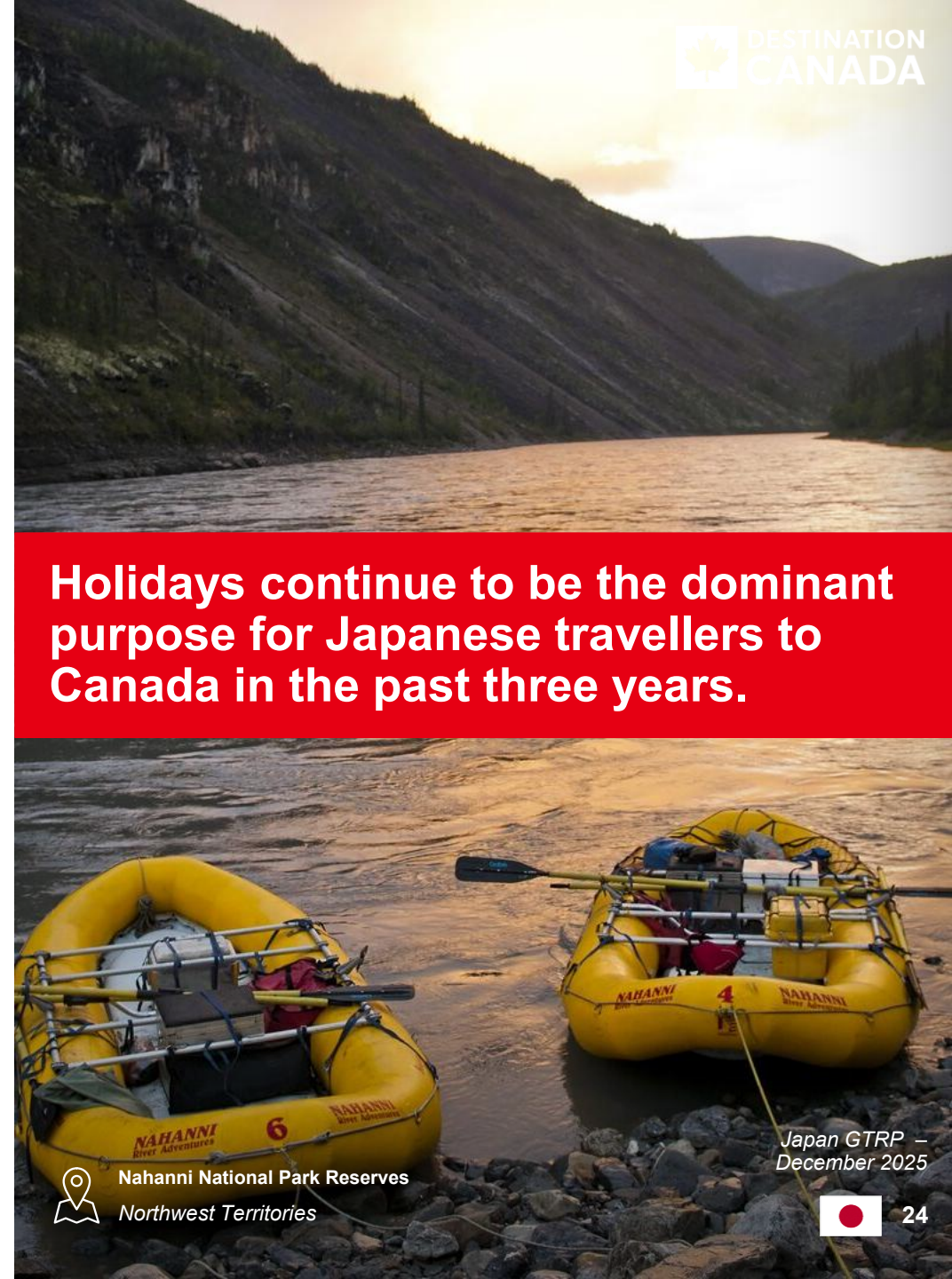
MAIN PURPOSE OF RECENT TRIP



Holidays continue to be the dominant purpose for Japanese travellers to Canada in the past three years.

↑ / ↓ = significantly higher/lower result (2025 vs. 2024)

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to Canada past 3 years (n=56)
 F2. What was the main purpose of this trip? (Select one)

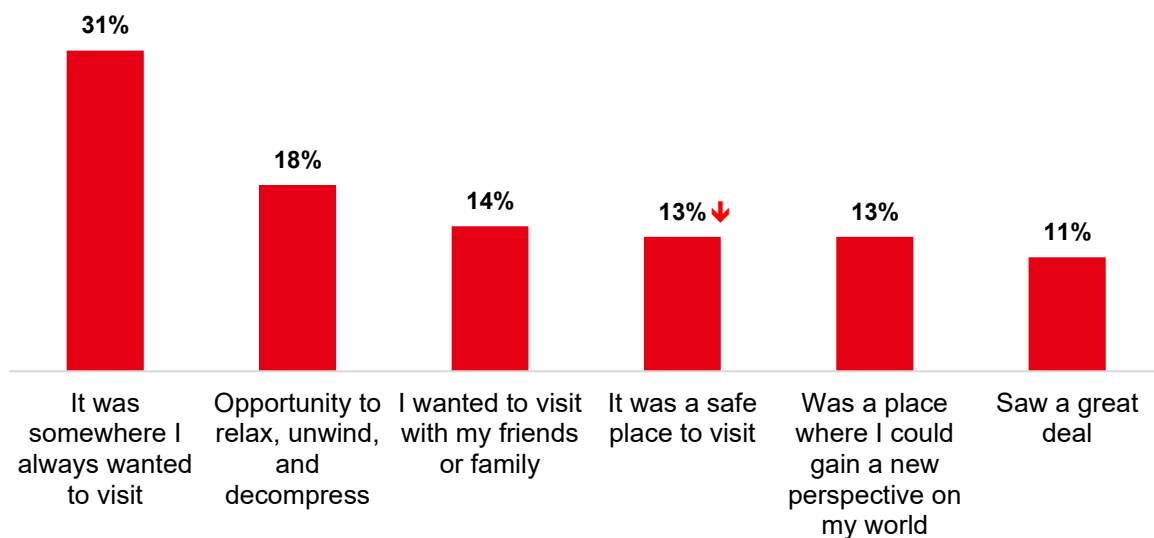


Nahanni National Park Reserves
 Northwest Territories

Japan GTRP –
 December 2025



FACTORS IN CHOOSING DESTINATION FOR RECENT TRIP (TOP 6)



Japanese travellers are drawn to Canada for its aspirational appeal and opportunities to relax. Compared to 2024, fewer travellers cite safety as a key reason to visit.

↑ / ↓ = significantly higher/lower result (2025 vs. 2024)

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to Canada past 3 years, Took a holiday (n=37*)

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)

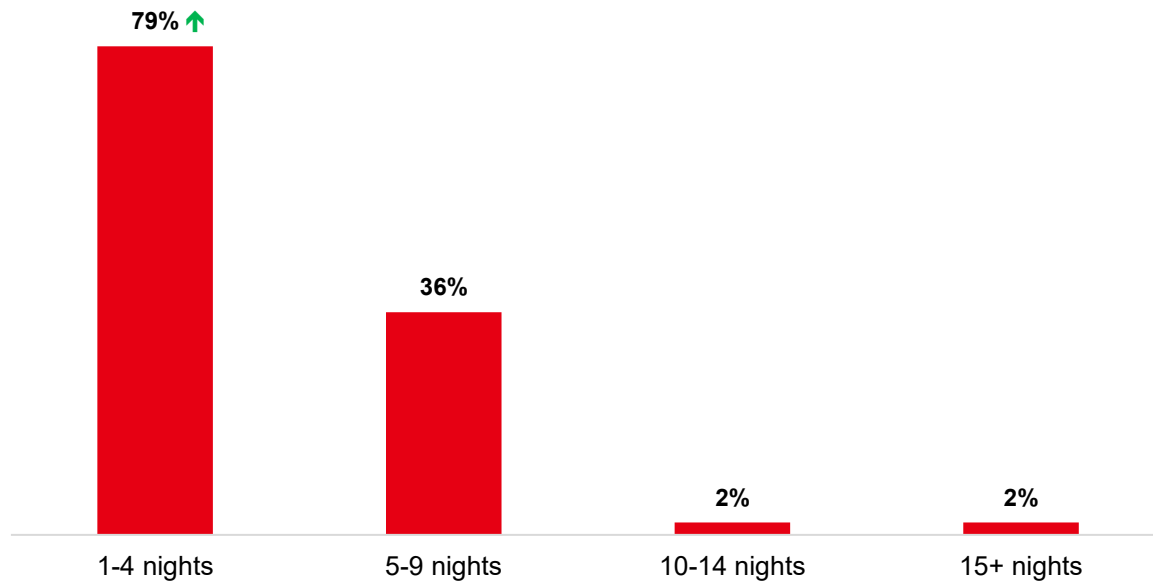


Fundy Trail Provincial Park
New Brunswick

Japan GTRP –
December 2025



NIGHTS SPENT DURING RECENT TRIP



↑ / ↓ = significantly higher/lower result (2025 vs. 2024)

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to Canada past 3 years (n=56)
F4. How many nights did you spend in this destination?

Trips to Canada up to four days are the most common, increasing compared to last year.

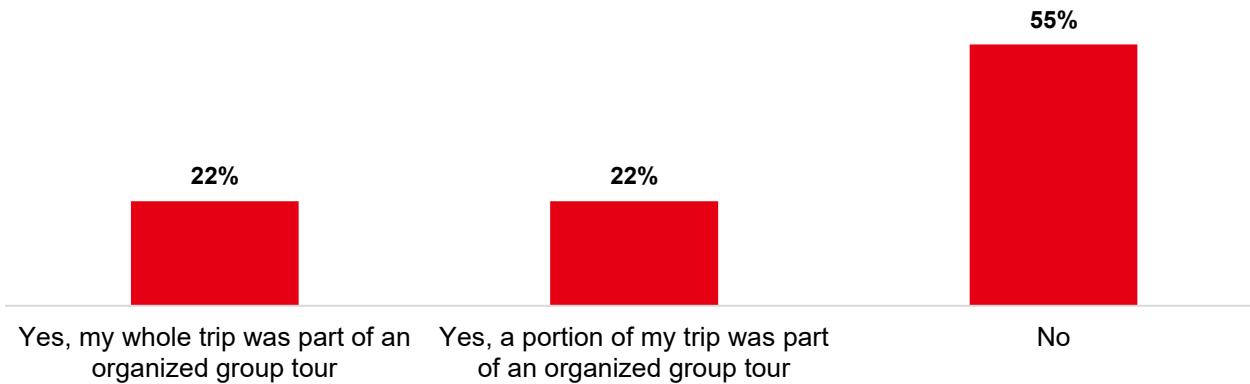


Barren Canyon, Algonquin Park
Ontario

Japan GTRP –
December 2025



ORGANIZED GROUP TOUR FOR RECENT TRIP



↑ / ↓ = significantly higher/lower result (2025 vs. 2024)

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to Canada past 3 years (n=56)
 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?

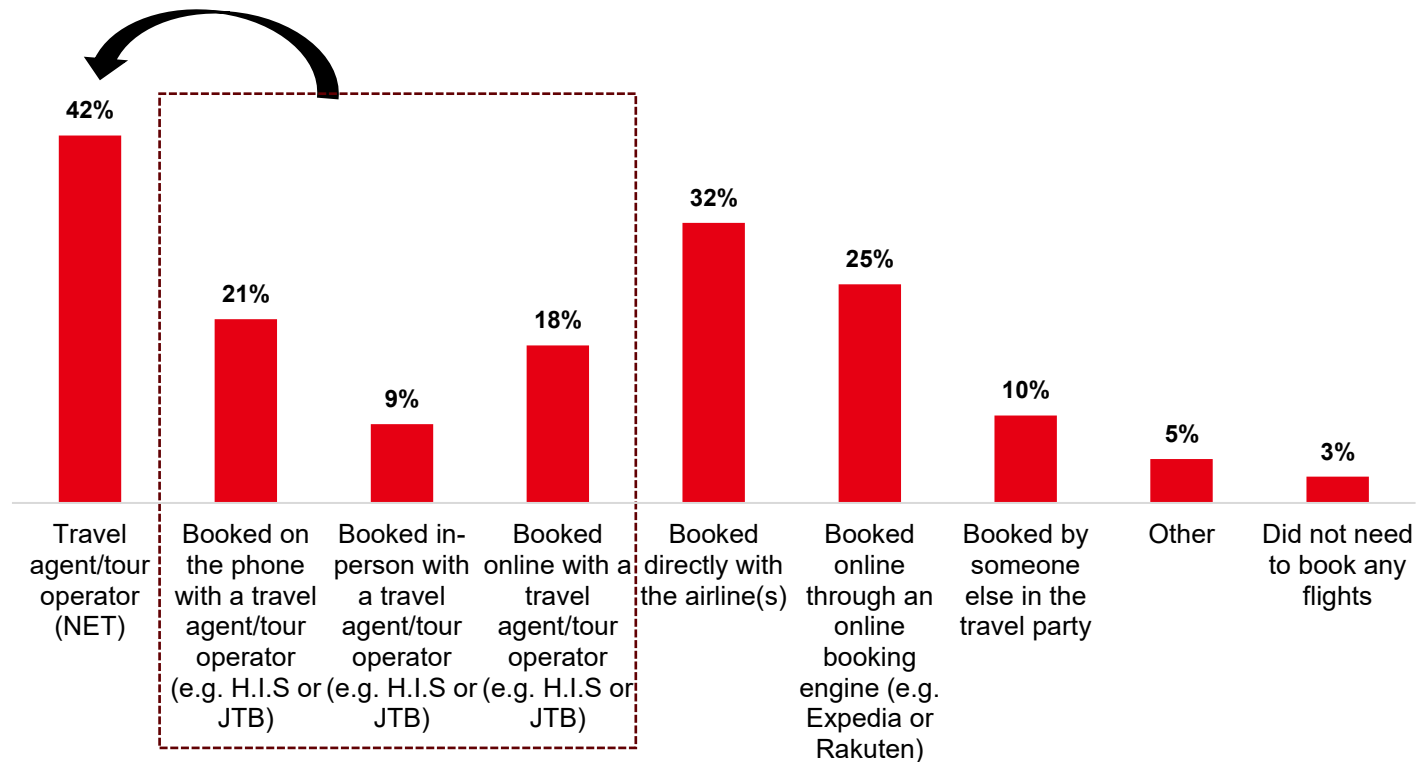


Over four in ten travellers to Canada in the past three years used an organized group tour for at least a portion of their trip.

Saskatoon
 Saskatchewan

Japan GTRP –
 December 2025

BOOKING FLIGHTS FOR RECENT TRIP

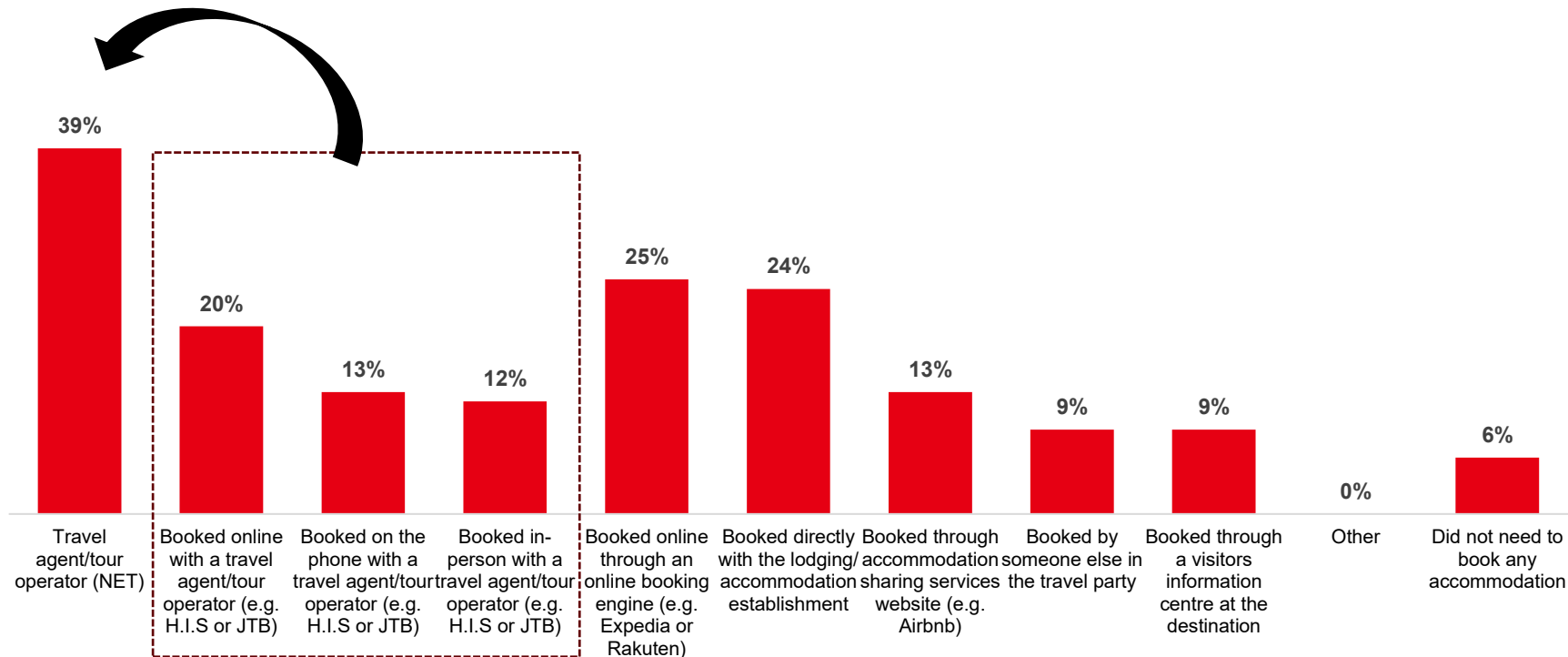


Booking flights through a travel agent or tour operator and directly through the airline were the most popular ways to book among recent Japanese travellers to Canada.

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to Canada past 3 years (n=56)
F12. How did you book your flight for this trip? (Select all that apply)



BOOKING ACCOMMODATIONS FOR RECENT TRIP

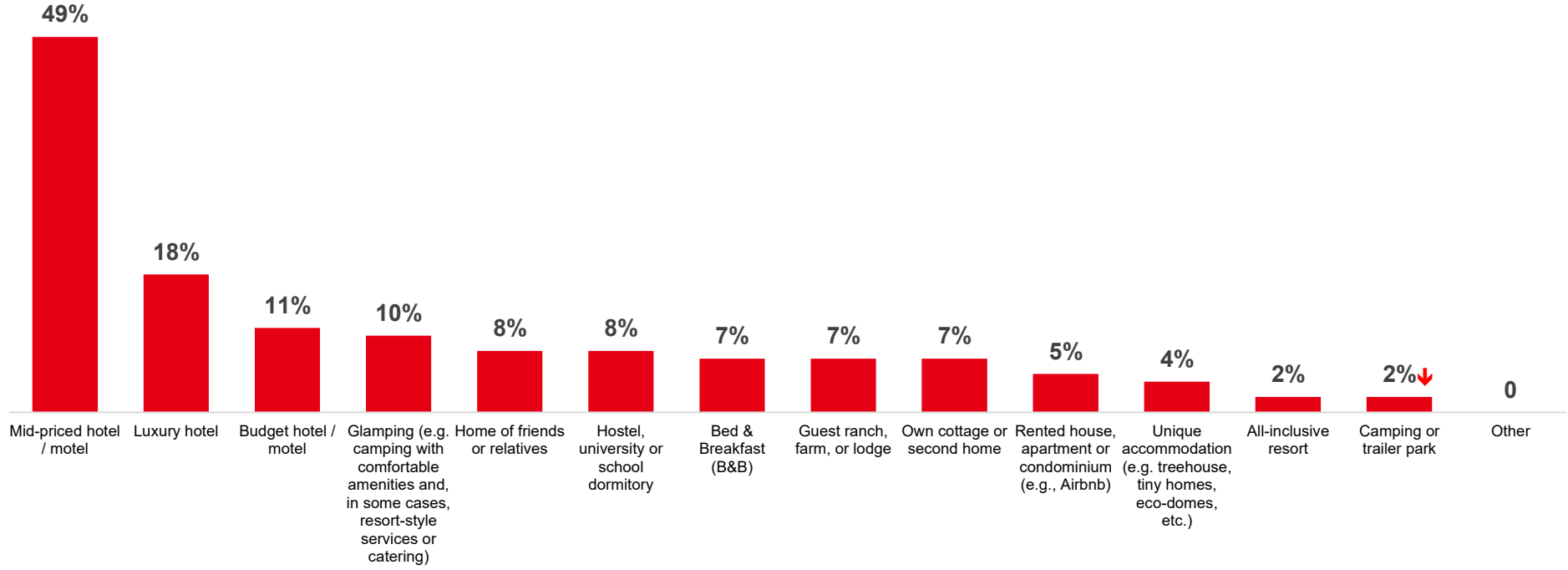


Like flights, Japanese travellers to Canada were most likely to use a travel agent or tour operator to book accommodations.

↑ / ↓ = significantly higher/lower result (2025 vs. 2024)

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to Canada past 3 years (n=56)
 F13. How did you book your accommodation for this trip? (Select all that apply)

TYPE OF ACCOMMODATIONS FOR RECENT TRIP



↑ / ↓ = significantly higher/lower result (2025 vs. 2024)

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to Canada past 3 years, Booked Accommodations (n=53)
 F14. Which type of accommodation did you stay in during this trip? (Select all that apply)



Japanese travellers that recently travelled to Canada were most likely to stay in a mid-priced hotel or motel.



Japan GTRP
December 2026

Rideau Canal
Ontario



THANK YOU

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

