

2021 Global Tourism Watch Highlights Report



Global Tourism Watch



Japan

Canada

 DESTINATION
CANADA



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 accommodation in the past 3 years, or plan to take such a trip in the next 2 years.



Timing of Fieldwork



Oct

2021

Note: this study is conducted annually. Significant differences from the last wave in November 2020 are identified with ▲ / ▼.



Geographical Definition for Qualified Trips

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



GTW Sample Distribution

Sample distribution: **National**

Recent visitors to Canada: **100**
Other travellers: **1,400**
Total sample size: **1,500**

Market Overview

It is important to consider the results in light of the COVID-19 situation at the time of data collection (October 2021).

COVID-19 situation in Japan

Vaccine hesitancy was an issue in Japan in early 2021. With the country set to host the Summer Olympics in July 2021, there were fears the Games would become a super-spreader event with just 3.5% of the Japanese population vaccinated in the weeks leading up to the event.¹ In early July, the Army was called in to help with vaccination and a million shots per day were administered. In addition to high levels of vaccination by Fall 2021, masking and social distancing were still in effect. Japan's death rates from COVID-19 were much lower than the US and Europe.²

Outbound travel situation

On October 1, 2021, Japan lifted its COVID-19 state of emergency for the first time in more than six months.³ While some measures eased, non-business Japanese travellers faced a 10-day quarantine upon return to Japan.⁴ While there was pent-up demand for travel, most travel was within Japan as only 50,000 Japanese citizens travelled internationally in October 2021.⁵

Canada's borders re-opened to non-resident visitors who were fully vaccinated with a Health Canada approved vaccine on September 7, 2021. All visitors still required a pre-entry COVID-19 molecular test, but quarantine requirements were eliminated for vaccinated travellers.⁶

¹ BBC News, November 2021.

² BBC News, November 2021.

³ CBS News, October 2021.

⁴ Japan Travel Voice, November 2021.

⁵ Japan Times, November 2021.

⁶ Government of Canada, September 2021.

Travel Indicators

Japan is a mature market with high levels of long-haul travel in the past and improving travel intention.



↗ / ↘ Significantly higher/lower than 2020 GTW wave.

KEY HIGHLIGHTS

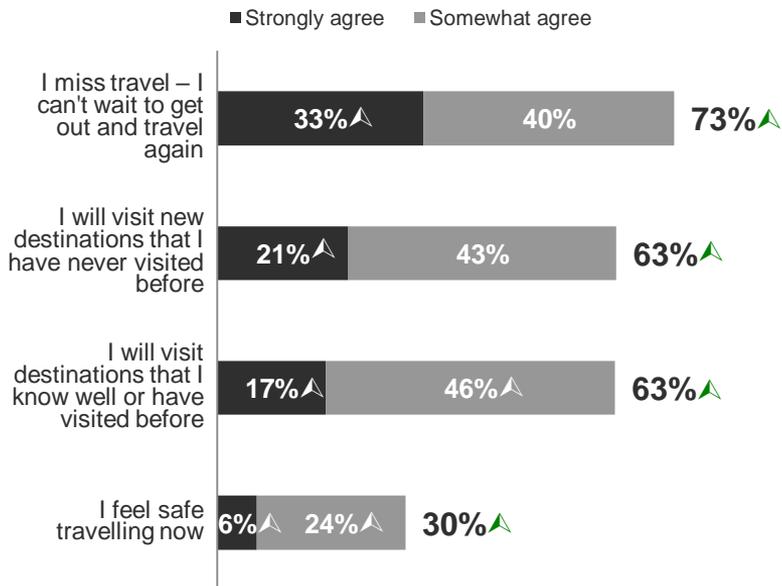
Insight	Implication
<p>While there is pent-up demand for travel among Japanese travellers, still relatively few feel safe travelling. Although significantly more Japanese travellers say they feel safe travelling in 2021 compared to 2020, the proportion remains low. It seems likely that Japanese travellers will make a slow and cautious return to international travel.</p>	<p><i>To best meet the opportunity of Japanese travellers' renewed interest in travel and encourage them to visit Canada, it will be important for messaging to illustrate that Canada is a safe destination.</i></p>
<p>COVID-19 concerns related to caseloads, being stranded, infecting others, and travel insurance have dropped, but quarantine concerns (both at the destination and upon return to Japan) persist. Vaccine passport requirements are not an important consideration for Japanese travellers.</p>	<p><i>To attract potential visitors and differentiate Canada from competitors, it is important to communicate Canada's entry requirements for fully vaccinated travellers as well as the lack of quarantine requirements. However, until Japan relaxes its quarantine requirements for returning citizens, international travel rates will likely remain low.</i></p>
<p>Travel is the top spending priority for the next year. However, Japanese travellers are planning to spend less on travel post-COVID-19 than they did pre-COVID-19. While travel to long-haul destinations is projected to see the largest drop in spending, anticipated spending on long-haul travel is close to double the anticipated spending on short-haul travel.</p>	<p><i>The current prioritization of spending on travel, along with the moderately high anticipated spend on long-haul travel post-COVID-19, presents an opportunity for Canada, however, short-term prospects are modest.</i></p>
<p>Interest in seeing the Northern lights, both generally and on a trip to Canada, has increased and is now the top activity Japanese travellers would base a trip around. Interest in other outdoor-based activities also remains strong.</p>	<p><i>Viewing the Northern lights on a trip to Canada may be a strong lure for Japanese travellers, and presents an opportunity to differentiate Canada from some competitors.</i></p>
<p>A consistently lower level of knowledge of holiday opportunities in Canada has emerged as one of the top barriers to visiting Canada, along with cost and travel distance.</p>	<p><i>At a time when Japanese travellers foresee spending less on long-haul travel, building better awareness of vacation opportunities in Canada may help to convince prospective visitors that a Canadian vacation offers good value for money. Travel incentives and deals may also help to encourage visitation to Canada.</i></p>
<p>Interest in visiting Canada during the late spring and early fall seasons outpaces historical visitation during those months. Additionally, spring and fall outrank summer as the preferred seasons to take part in many popular vacation activities, while other activities hold three- or four-season appeal.</p>	<p><i>There is an opportunity to disperse Japanese visitation into the shoulder seasons by promoting activities that are popular outside of the busy summer months.</i></p>
<p>Travel agents and tour operators play a substantial role in supporting travel from Japan to Canada. The majority of potential Japanese visitors indicate that they are likely to use a travel agent to research or book a trip to Canada.</p>	<p><i>Building and maintaining relationships with the Japanese travel trade is important to boosting visitation to Canada.</i></p>

COVID-19 Considerations

Attitudes Toward Travel and Transportation Modes

- ▶ Japanese travellers remain cautious about returning to travel. While they are eager to travel again (73%, up from 61% in 2020), just 30% (up from 16% in 2020) say they feel safe travelling now. Older travellers (55+ years) remain particularly cautious.
- ▶ As COVID-19 restrictions ease, Japanese travellers are slowly growing more comfortable with using most forms of transportation, including flying internationally (41%, up from 37% in 2020).

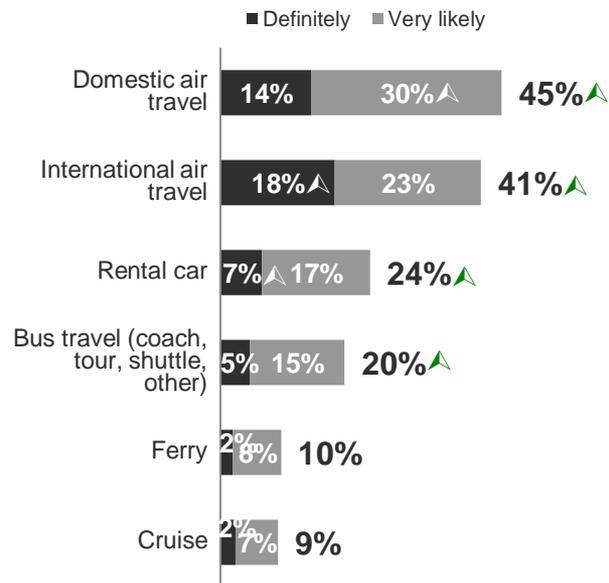
Attitudes Toward Travel



▲ / ▼ Significantly higher/lower than 2020 GTW wave.

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1500) COV13. Thinking of your next holiday, as government restrictions allow, how much do you agree or disagree with the following statements?

Transportation Modes

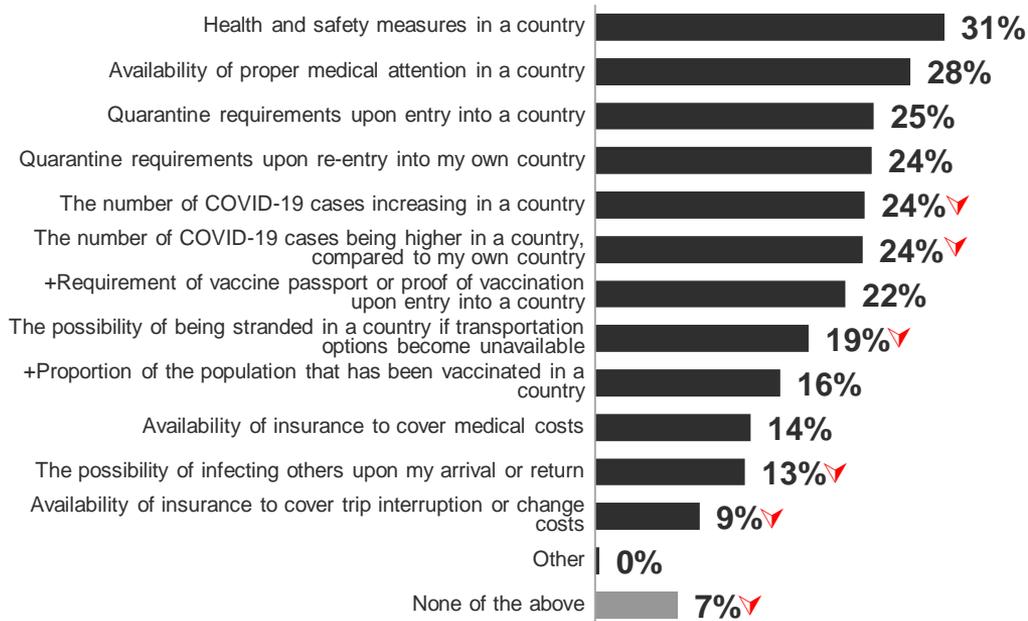


▲ / ▼ Significantly higher/lower than 2020 GTW wave.

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1500) COV16. As government restrictions allow, how likely are you to use the following modes of transportation?

Most Important Considerations in Selecting Travel Destination

- ▶ When selecting a destination, concerns related to COVID-19 caseloads, the possibility of being stranded, infecting others, and travel insurance are generally subsiding. Proof of vaccination/vaccine passports are also not high on Japanese travellers' list of considerations when selecting a travel destination.
- ▶ Concerns about health and safety measures and medical care are now the top concerns of Japanese travellers, followed by quarantine requirements at a destination and upon re-entry to Japan. In October 2021, there were no quarantine requirements for vaccinated travellers to enter Canada, but a 10-day quarantine for leisure travellers was in effect for those returning to Japan.



▲ / ▼ Significantly higher/lower than 2020 GTW wave.

+ New statement in 2021 GTW – no trending.

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

NEWQ3. When thinking about taking a holiday trip outside of your country, which of the following are the most important considerations in selecting your travel destination? (Select up to 3 options)

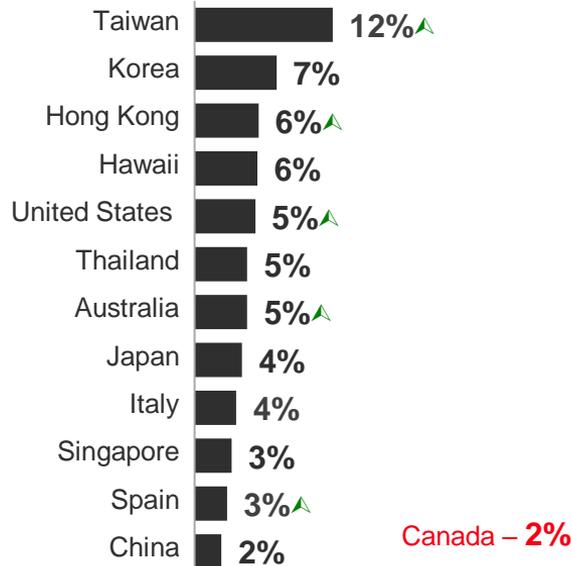
Key Performance Indicators

Unaided Long-Haul Destination Consideration (Next 2 Years)

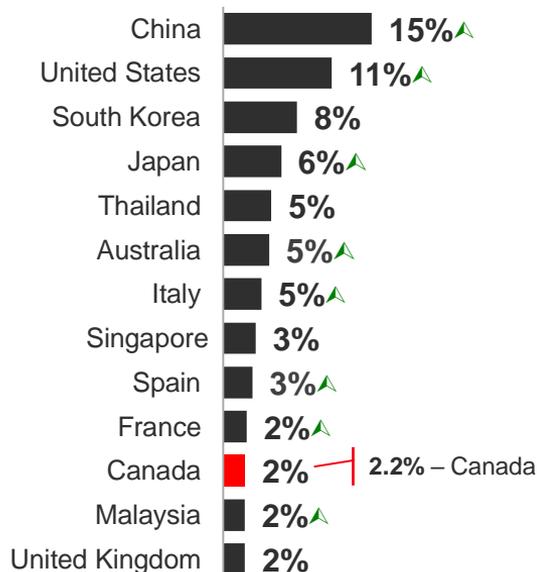
Unaided consideration represents the top-of-mind presence of destinations in the consumer mindset and requires travellers to think of destinations without being prompted.

- ▶ Canada is tied with France, Malaysia, and the UK as the #10 top-of-mind country that Japanese travellers are considering visiting in the next two years. China and the United States are the top destination countries and saw significantly improved results compared to 2020.
- ▶ While travel intent has increased since 2020, approximately half of Japanese travellers are still not planning to travel in the next two years.

Top 12 Destination Brands¹



Top 12 Destination Countries²



4%
Don't know

51%▼
Not planning to travel

▲ / ▼ Significantly higher/lower than 2020 GTW wave.

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).

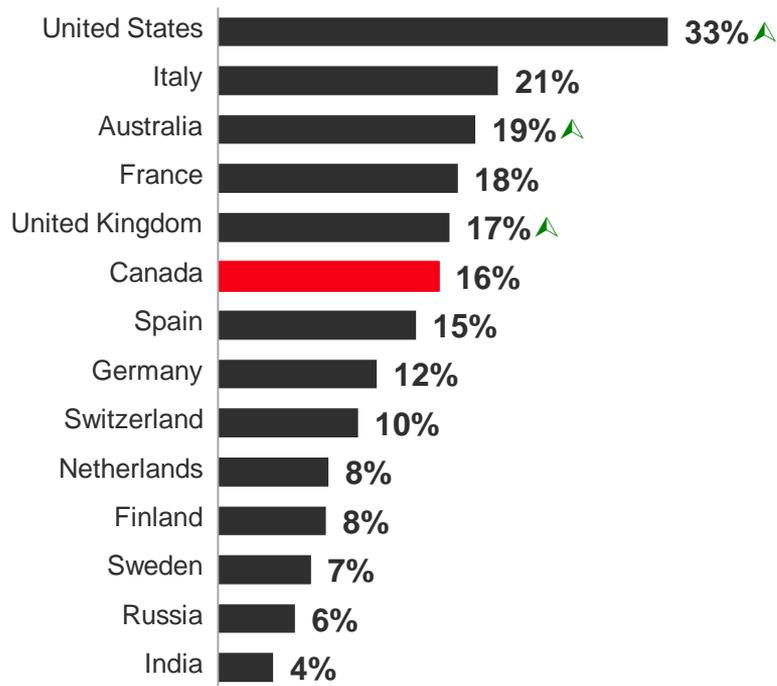
Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1500)

S8. You mentioned that you are likely to take a long-haul holiday trip outside of East Asia (e.g., China, Hong Kong, Macau, Japan, South Korea and Taiwan) in the next 2 years. Which destinations are you seriously considering? (Please list up to 3 destinations)

Aided Destination Consideration (Next 2 Years)

Aided consideration represents the proportion of travellers who say they would seriously consider visiting a destination, when prompted with a list of potential destinations. For these travellers, Canada may not be top-of-mind as a destination, but they are considering a visit in the next 2 years.

- ▶ Canada's rank on aided consideration dropped from 3rd in 2020 to 6th in 2021, as Australia and the UK recorded significantly improved results. The United States maintained the top rank and widened the gap with significantly improved performance in 2021.



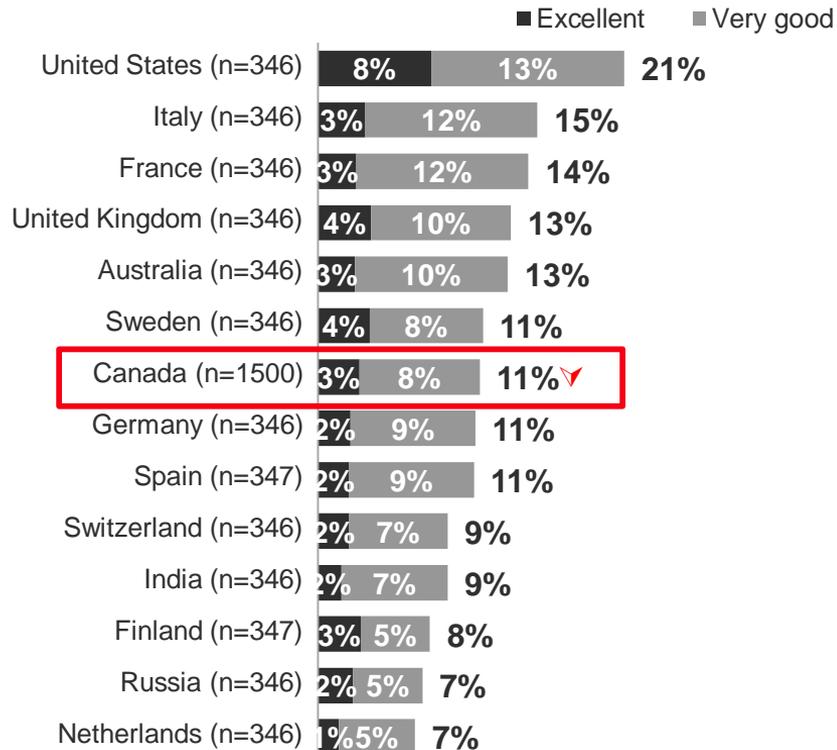
▲ / ▼ Significantly higher/lower than 2020 GTW wave.

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

BVC1. You may have already mentioned this before, but which destinations would you seriously consider visiting in the next 2 years? (Select all that apply)

Knowledge of Holiday Opportunities

- Canada continues to rank 7th on destination knowledge among long-haul competitors, with a significant drop in 2021. The United States remains considerably ahead of all competitors. This consistently lower level of knowledge of holiday opportunities in Canada among Japanese travellers may also be a barrier to visiting.¹



▲ / ▼ Significantly higher/lower than 2020 GTW wave.

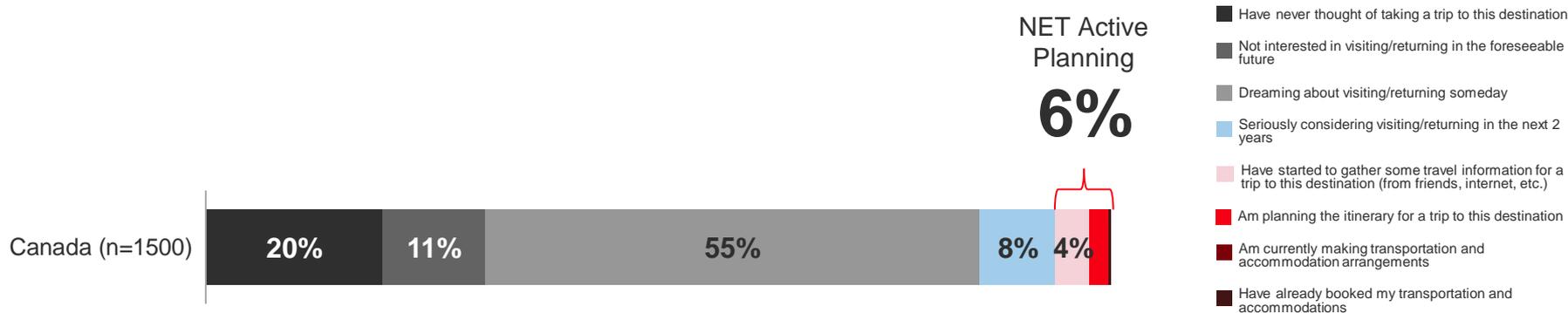
¹ Data can be found on page 25.

Base: Long-haul pleasure travellers (past 3 years or next 2 years) evaluating each destination MP3. How would you rate your level of knowledge of holiday opportunities in each of the following destinations?

Stage in the Purchase Cycle by Market

There is a purchasing or decision-making cycle associated with long-haul travel; consumers move through progressive stages from not knowing anything about a destination to booking a trip. **NET Active Planning** represents the final four stages, or lower funnel, of this path-to-purchase cycle.

- ▶ Between 2% and 10% of Japanese travellers are in the lower funnel stages of the purchase cycle for Canada's top competitor long-haul destinations. Canada is ranked 5th overall, tied with two other destinations, with 6% of Japanese travellers in the NET active planning stages for a trip to Canada. The low rate of NET active planning for all destinations suggests that Japanese travellers are not optimistic about the short-term prospects for long-haul international travel. Canada may face a challenge converting the small number of interested travellers into visitors.



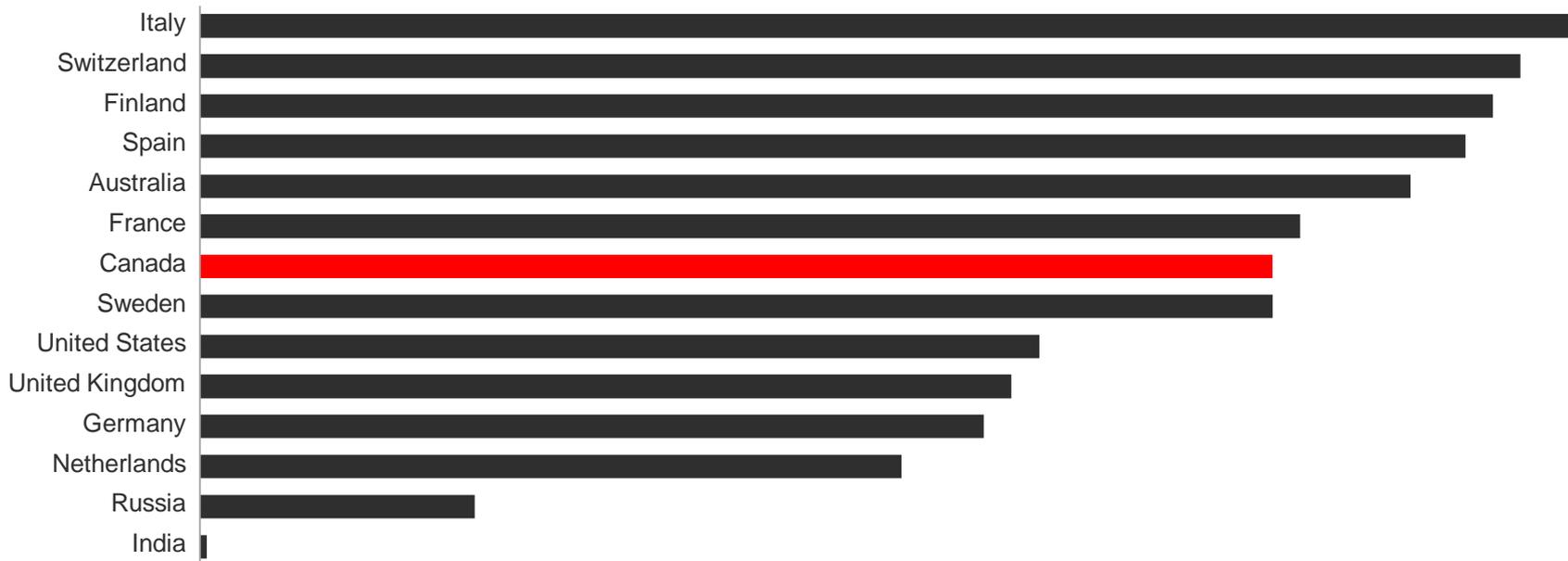
▲ / ▼ Significantly higher/lower than 2020 GTW wave.

NET Promoter Score (NPS)

The Net Promoter Score (NPS) measures the likelihood of travellers to recommend a destination. It is an important measure for advocacy, since a high NPS score suggests that those who have visited Canada are more likely to encourage others to visit. Results are gathered among travellers who have ever visited the destination and data has been normalized to indicate relative NPS scores across all competitors.

- ▶ While the NPS scores for some European destinations and Australia remained relatively stable, Canada saw a negative shift which moved it from the top spot in 2020 down to #7 in 2021.

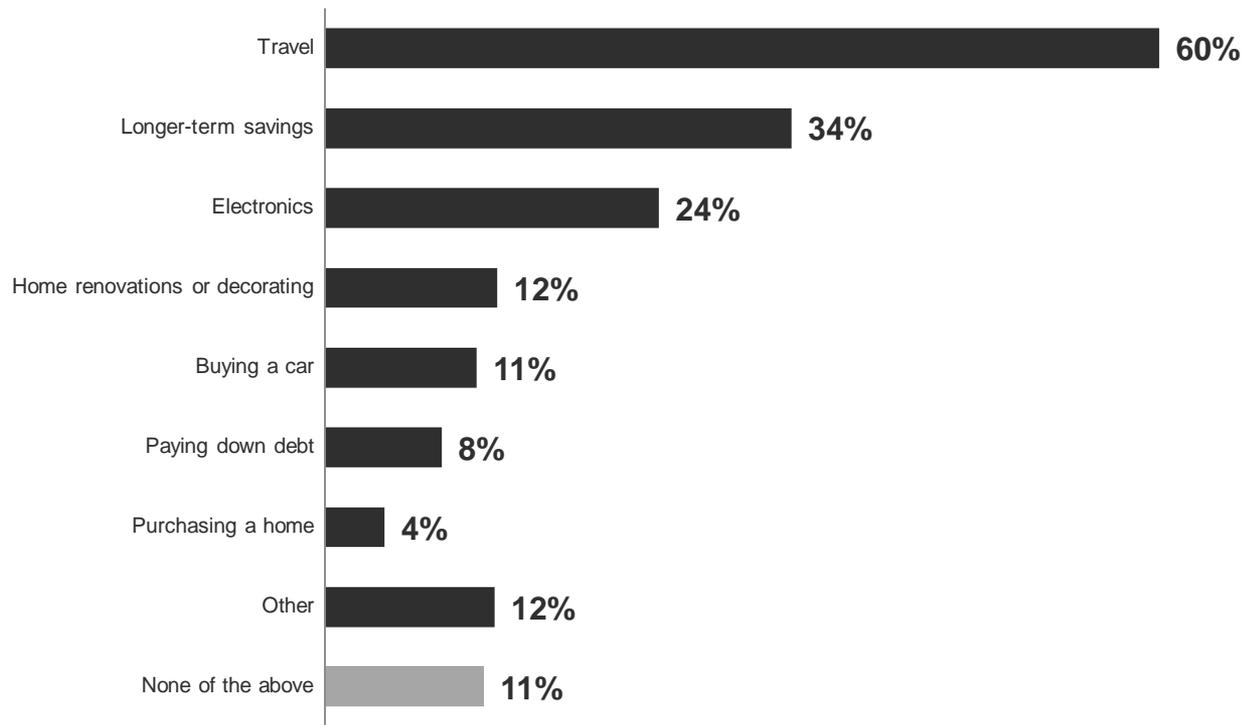
Normalized Data



Travel Spending and Canada Travel Intent

Spending Priorities for the Next Year⁺

► Travel is the top immediate spending priority for Japanese travellers in 2021, far ahead of secondary priorities such as savings and electronics.



⁺ New question in 2021 GTW – no trending.

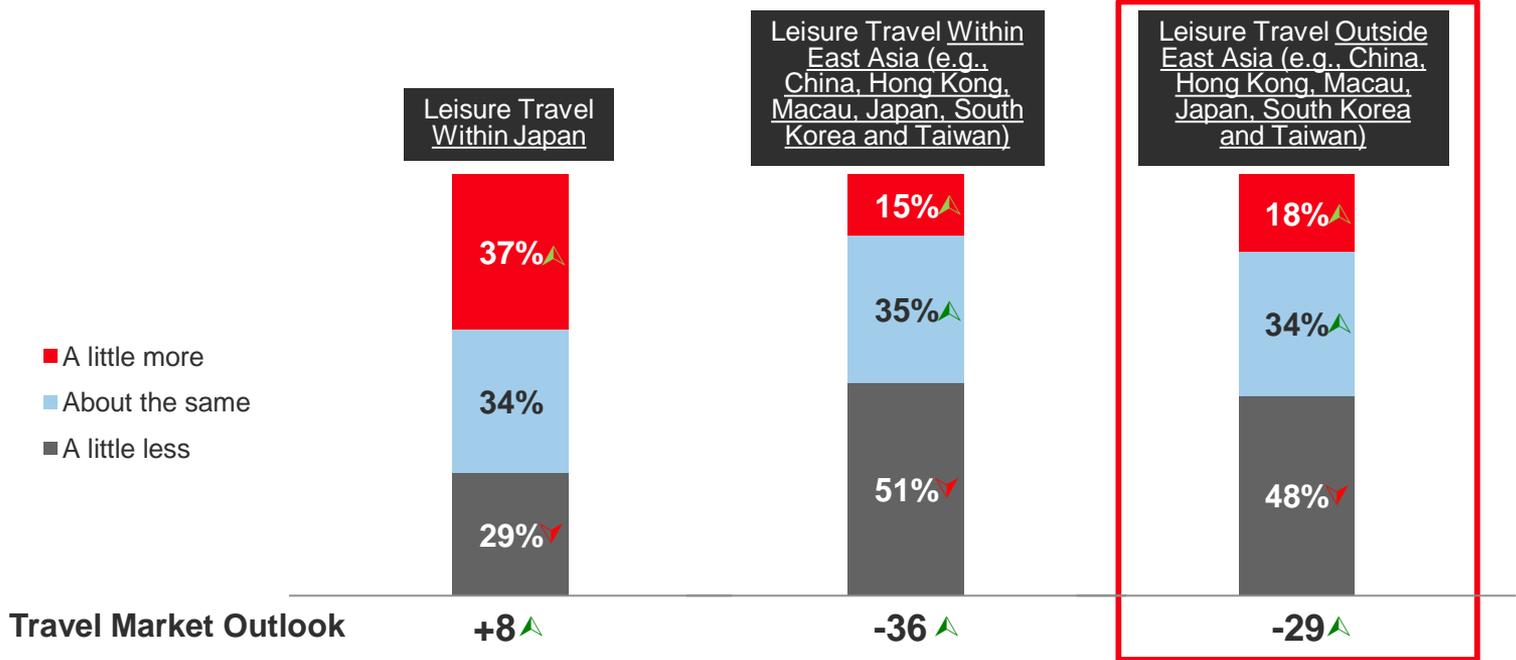
Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1500)

AT. In the next 12 months, which of following will you prioritize spending money on? (Select up to 3 options)

Travel Spending Intentions (in Next 12 Months)

Travel Market Outlook is the difference between the proportion who say they will spend more on travel in the next 12 months than they did in the last 12 months, minus the proportion who say will spend less on travel in the next 12 months than in the last 12 months.

- ▶ Japanese travellers foresee spending more on all types of travel in the next year than they did in the past year. The domestic travel outlook is most improved (-27 in 2020 vs +8 in 2021).
- ▶ While the long-haul travel outlook is still negative, it is significantly improved from 2020 (-57) and close to 2019 levels (-23).



■ A little more
■ About the same
■ A little less

▲ / ▼ Significantly higher/lower than 2020 GTW wave.

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1500)
 S2. How would you describe your spending intentions on the following items in the next 12 months compared to the last 12 months? Will you spend ...?

Travel Spending⁺

- ▶ Although travel is a spending priority and the outlook for spending on travel has improved compared to 2020, Japanese travellers still anticipate spending less on travel post-COVID-19 than they did prior to COVID-19.
- ▶ While travel to long-haul destinations is projected to see the greatest percentage drop in spending, anticipated spending on long-haul travel (\$4,140) is still considerably higher than the anticipated spending on short-haul travel (\$2,442).

Mean Annual Household Spend on Vacation Trips

PRE-COVID	POST-COVID	NET CHANGE POST-COVID MINUS PRE-COVID	
Travelling within Japan			
\$1866	\$1864	-\$2	(-0.1%)
Travelling within East Asia (e.g., China, Hong Kong, Macau, Japan, South Korea and Taiwan)			
\$2599	\$2442	-\$157	(-6%)
Travelling outside East Asia (e.g., China, Hong Kong, Macau, Japan, South Korea and Taiwan)			
\$4960	\$4140	-\$820	(-17%)

* New questions in 2021 GTW – no trending.

Base: Long-haul pleasure travellers who travelled in 2019 (n=463 Domestic / n=220 Short-haul / n=238 Long-haul)

TP2_INT. Thinking about the holiday trips you took in 2019, approximately how much did your immediate household spend in total on trips to each destination? A rough estimate is fine but if you cannot remember please select don't know. (PRE-COVID)

Base: Long-haul pleasure travellers who expect to travel post-COVID-19 (n=462 Domestic / n=204 Short-haul / n=237 Long-haul)

TP2B_INT. Thinking about the vacation trips you plan to take when COVID-19 is no longer a consideration, approximately how much does your immediate household intend to spend in total on trips to each destination? A rough estimate is fine but if it's too hard to predict please select don't know. (POST-COVID)

Likelihood of Visiting Canada in Next 2 Years

- ▶ Among all Japanese travellers, the likelihood of visiting Canada in the next two years remains stable at 15%.
- ▶ Intent to visit Canada in the next two years is highest among those aged 18-34 and lowest among those aged 55+.
- ▶ Japanese travellers are equally likely to be considering a shorter trip of 1-3 nights or a longer trip of 4+ nights when visiting Canada in the next 2 years.

Likelihood of Taking a Trip of:

1 to 3 nights

4+ nights

- Definitely
- Very likely
- Somewhat likely
- Not interested



15%
Likely
(definitely/very likely) to visit
Canada in next
2 years

▲ / ▼ Significantly higher/lower than 2020 GTW wave.

Note: Not interested is comprised of those saying not very likely, not at all likely, or indicating no intention to visit Canada.

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

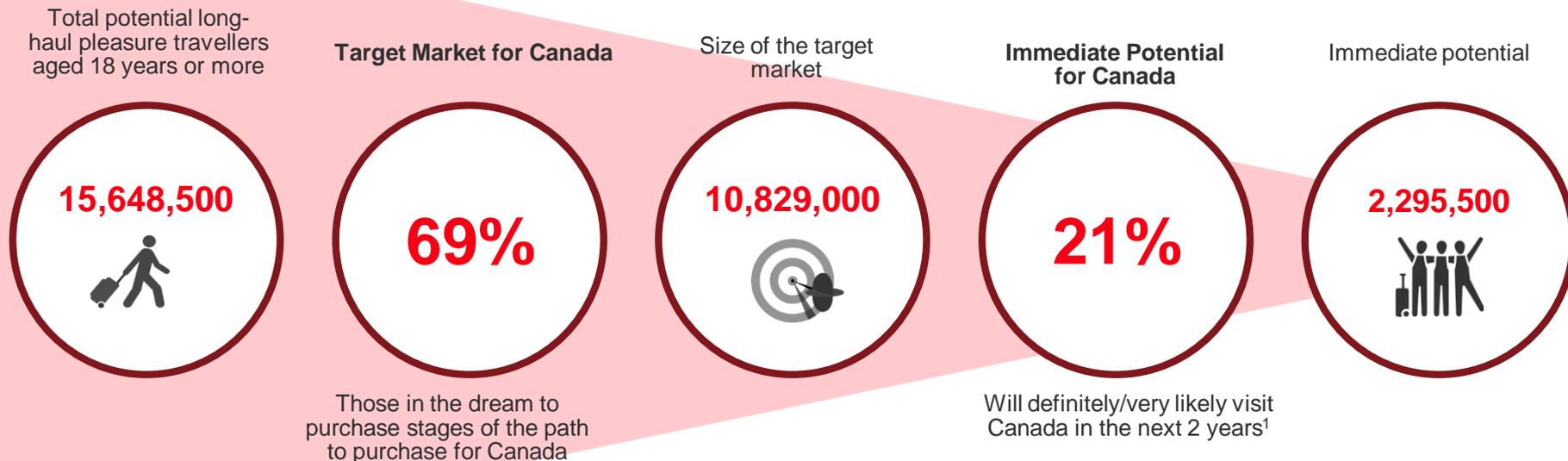
MP6. Realistically, how likely are you to take a holiday trip to Canada in the next 2 years?

Potential Market Size For Canada

Study data is used to estimate the size of the potential market for Canada in two ways – the target market (proportion of all Japanese travellers in the dream to purchase stages of the purchase cycle for Canada) and the immediate potential market (intention among the target market to visit in the next two years).

- ▶ The proportion of Japanese travellers considering Canada remains stable in 2021, and within that group the intention to visit in the next two years is also constant, resulting in an immediate potential market size of 2.3 million.

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



▲ / ▼ Significantly higher/lower than 2020 GTW wave.

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=1035)

MP1. Which of the following best describes your current situation when thinking about each of the following destinations for a holiday trip?

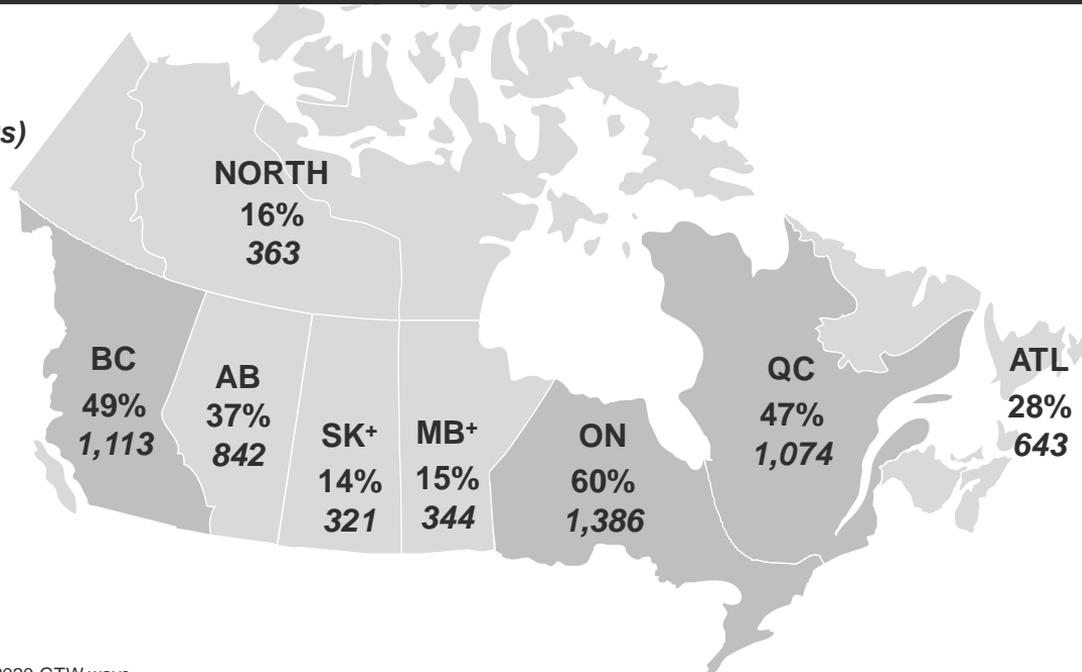
MP6. Realistically, how likely are you to take a holiday trip to Canada in the next 2 years?

Potential Market Size for the Regions

- ▶ Japanese traveller interest in visiting Canadian regions has not shifted significantly since 2020. Ontario, BC, and Quebec continue to stand out as the provinces most likely to attract the largest share of Japanese travellers.

Immediate Potential for Canada: **2,295,500**

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



▲ / ▼ Significantly higher/lower than 2020 GTW wave.

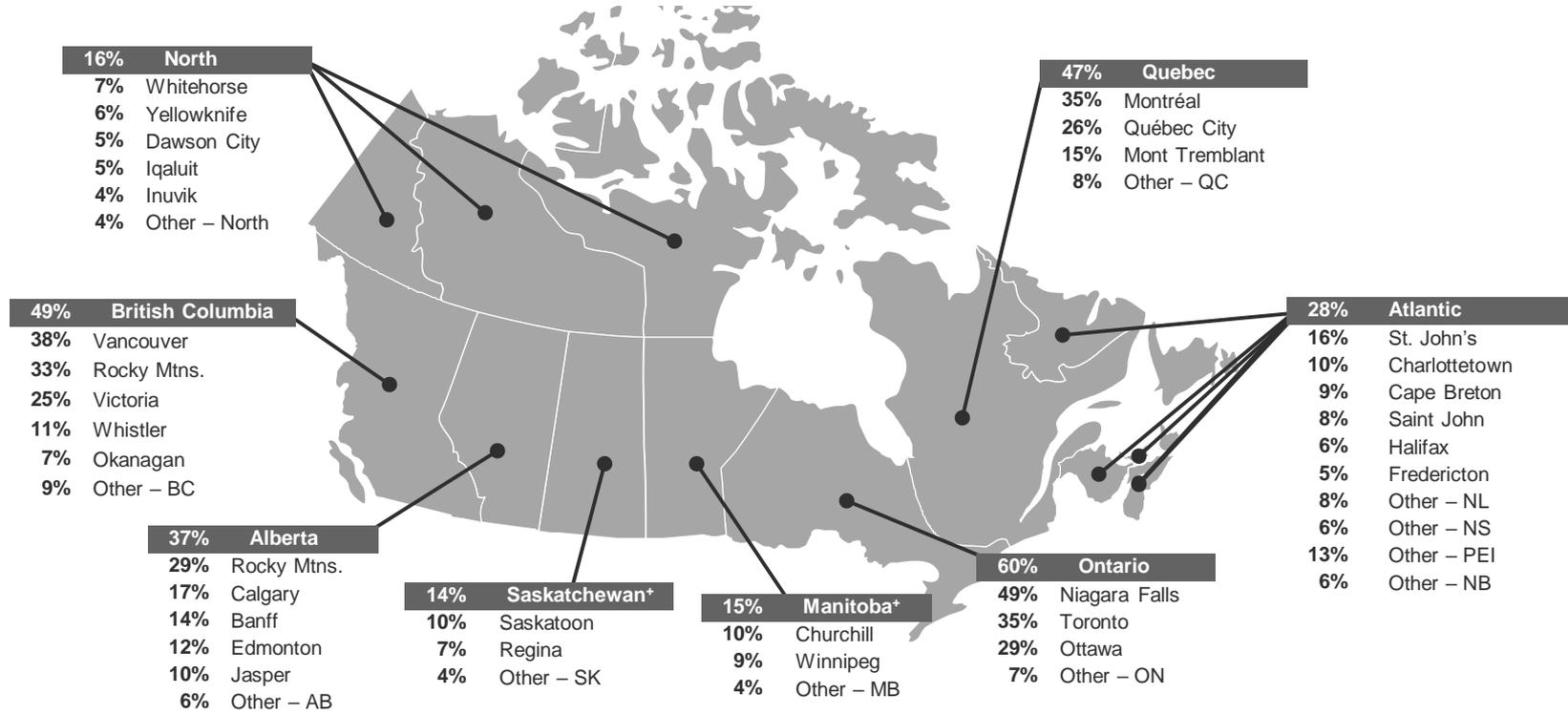
+ Saskatchewan and Manitoba were combined in 2020 GTW wave – no trending.

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=275)

MP7. If you were to take a holiday trip to Canada in the next 2 years, which of the following Canadian travel destinations are you likely to visit? (Select all that apply)

Canadian Destinations Likely to Visit

▶ Japanese traveller interest in visiting different Canadian destinations remains similar to 2020.



▲ / ▼ Significantly higher/lower than 2020 GTW wave.

* Saskatchewan and Manitoba were combined in 2020 GTW wave – no trending.

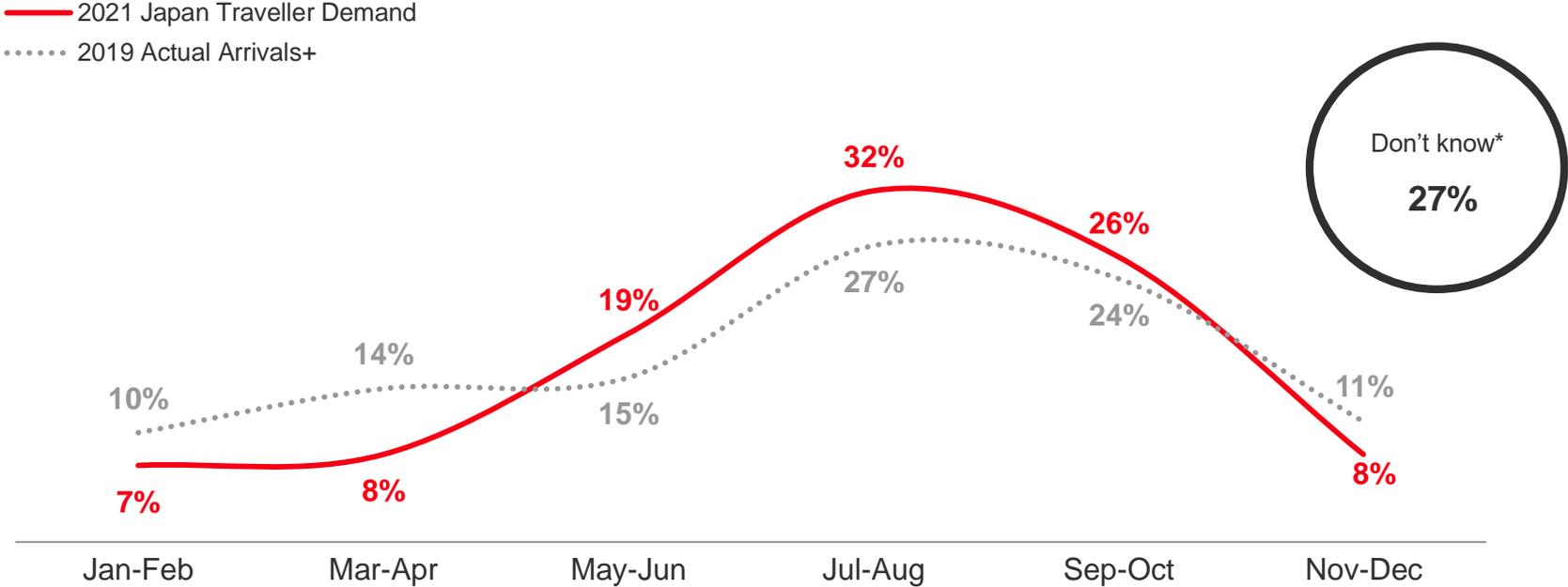
Base: Those in the dream to purchase stages of the path to purchase for Canada and definitely/very likely to take a trip to Canada (n=275)

MP7. If you were to take a vacation trip to Canada in the next 2 years, which of the following Canadian travel destinations are you likely to visit? (Select all that apply)

MP7a-i. Within [province/region], which travel destinations are you likely to visit? (Select all that apply)

Japan Seasonal Demand for Canada

- ▶ July and August are the most popular months for Japanese travellers considering a visit to Canada, and also historically the peak months for visitor arrivals from Japan.
- ▶ While not as quite as popular as the peak summer months, there is potential to disperse Japanese visitation into the late spring and early fall seasons given that demand outpaces historical visitation during these months.



+ Source: 2019 Statistics Canada Frontier Border Counts.
 * 'Don't know' responses excluded from seasonal demand chart.

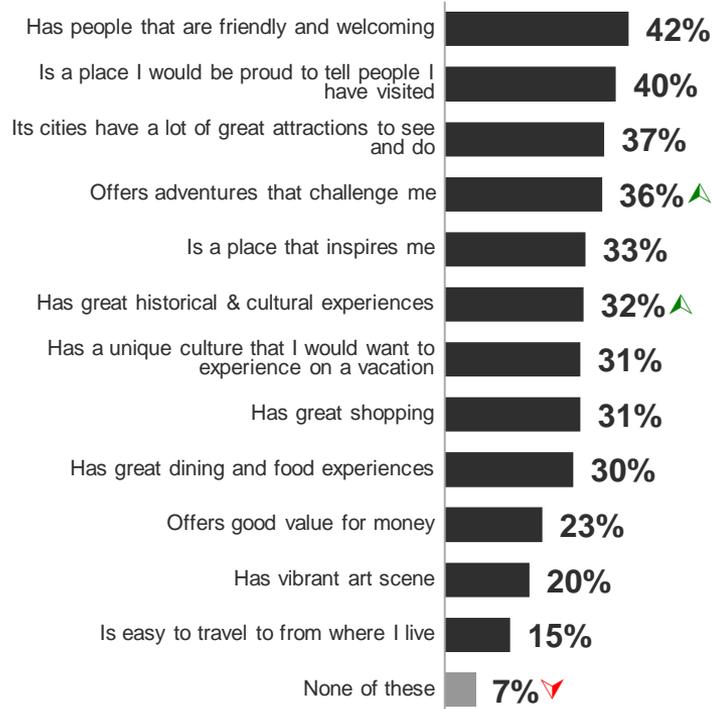
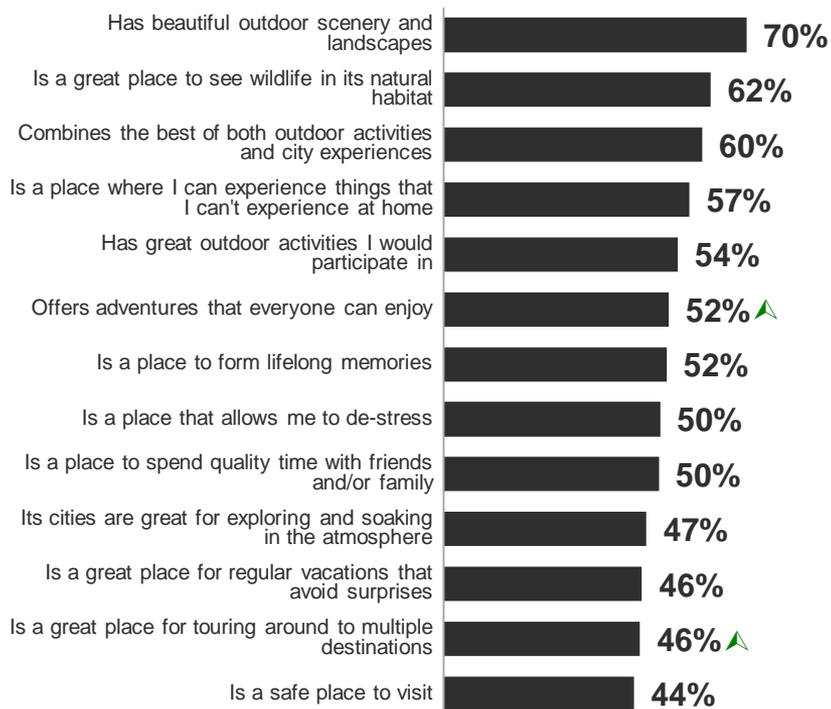
▲ / ▼ Significantly higher/lower than 2020 GTW wave.
 Base: Those in the dream to purchase stages of the path to purchase for Canada, excluding 'Don't know' (n=749)
 PC3. What time of year would you consider taking a holiday trip to Canada in the next 2 years? (Select all that apply)



Impressions of Canada

Impressions of Canada as a Holiday Destination

► Canada is best known among Japanese travellers for beautiful scenery and landscapes, wildlife viewing, and offering a combination of outdoor and city experiences. Impressions of Canada as a place offering adventure, multi-destination touring opportunities, and historical and cultural experiences improved in 2021.



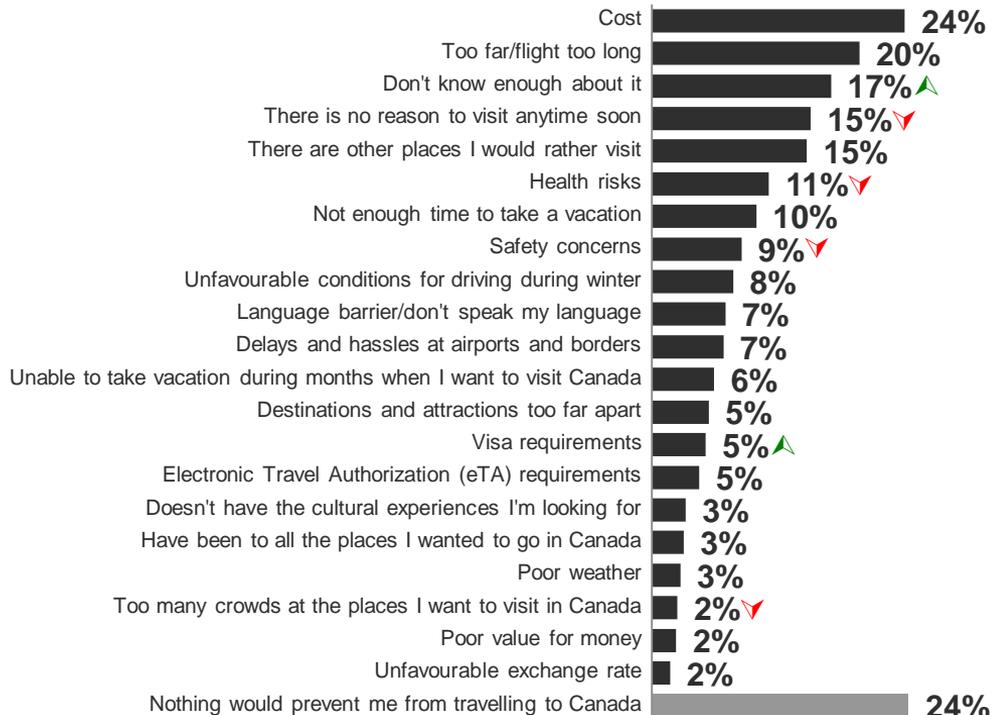
▲ / ▼ Significantly higher/lower than 2020 GTW wave.

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

MP5_NEW. We are interested in your general impressions about destinations, even if you have never been there. Please select all the destination you think apply to the statement. Select None of these if you think none of the destinations apply.

Key Barriers for Visiting Canada

- ▶ Cost has re-emerged as the top deterrent for potential Japanese travellers to visit Canada in 2021, replacing a lack of urgency to visit, which declined in importance compared to a year ago. Meanwhile, a lack of knowledge about Canada increased as a potential barrier in 2021.
- ▶ As COVID-19 vaccines became more globally available in 2021, health risks and safety concerns have declined in importance.



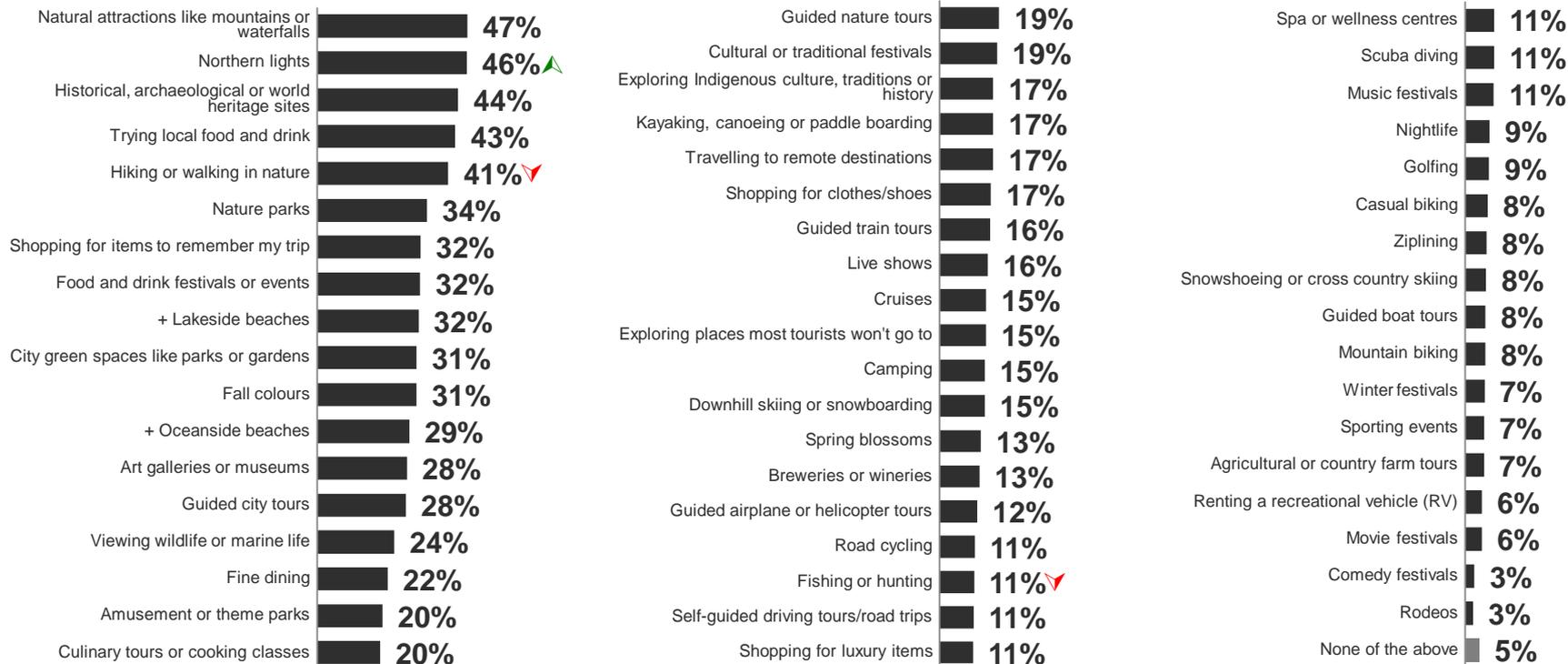
▲ / ▼ Significantly higher/lower than 2020 GTW wave.

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1500)
MP9. Which of the following factors might discourage you from visiting Canada? (Select all that apply)

Vacation Interests

Activities Interested in While on Holiday

- ▶ Japanese travellers have a strong preference for nature-based holiday activities, historical sites and trying local food and drink.
- ▶ Interest in the Northern lights increased compared to 2020 and is ranked 2nd overall as a holiday activity, while hiking has fallen from the top spot to 5th overall.



+ New statement in 2021 GTW – no trending.

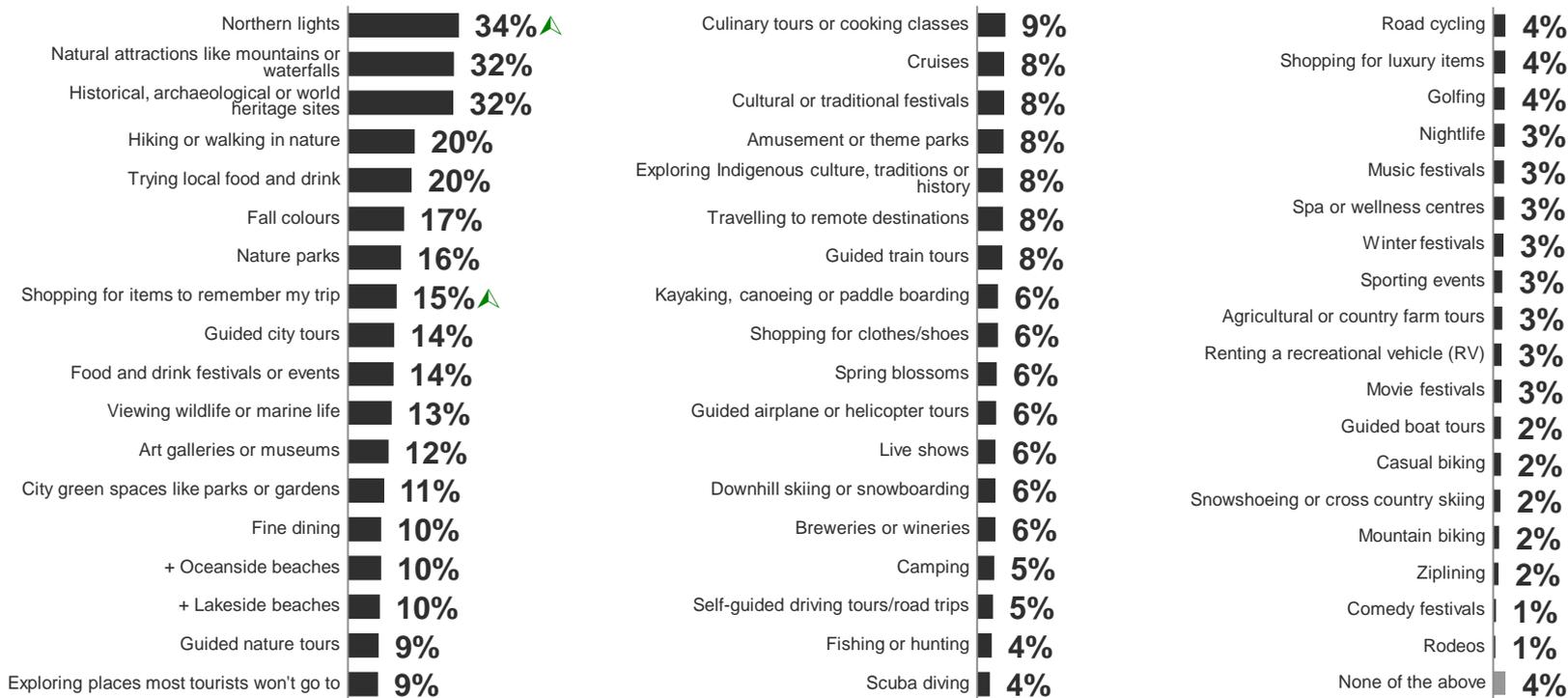
Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1500)

MP10. In general, what activities or places are you interested in while on vacation? (Select all that apply)

▲ / ▼ Significantly higher/lower than 2020 GTW wave.

Activities to Base an Entire Trip Around

- ▶ Seeing the Northern lights is the top activity that Japanese travellers would base a trip around, and interest increased in 2021, which presents a key opportunity for Canada. Natural attractions like mountains and waterfalls and historical sites are also strong trip anchors.



▲ / ▼ Significantly higher/lower than 2020 GTW wave.

+ New statement in 2021 GTW – no trending.

Base: Long-haul pleasure travellers (past 3 years or next 2 years) answering (n=1418)

MP12. Among these activities, are there any that are important enough that you would base an entire trip around that activity? (Select all that apply)

Time of Year Would Participate in Activities While on Holiday*

- Spring and fall outrank summer as the preferred seasons to take part in many popular vacation activities such as visiting historic sites, hiking, and nature parks. Other activities such as natural attractions, food and drink festivals, and lakeside beaches hold three season appeal. There are also several activities, especially city-oriented activities, which are popular year-round.

	Summer	Fall	Winter	Spring
Natural attractions like mountains or waterfalls	52%	52%	14%	53%
Northern lights	14%	16%	84%	10%
Historical, archaeological or world heritage sites	40%	60%	19%	70%
Trying local food and drink	57%	72%	49%	72%
Hiking or walking in nature	39%	65%	9%	69%
Nature parks	42%	57%	13%	72%
Shopping for items to remember my trip	59%	63%	46%	72%
Food and drink festivals or events	54%	61%	35%	61%
+ Lakeside beaches	63%	54%	14%	61%
City green spaces like parks or gardens	42%	56%	19%	77%
Fall colours	n/a	100%	n/a	n/a
+ Oceanside beaches	84%	27%	11%	48%
Art galleries or museums	53%	72%	46%	71%
Guided city tours	38%	62%	29%	73%
Viewing wildlife or marine life	61%	32%	14%	58%
Fine dining	51%	68%	53%	60%
Amusement or theme parks	48%	55%	17%	80%
Culinary tours or cooking classes	46%	59%	36%	64%

	Summer	Fall	Winter	Spring
Guided nature tours	35%	49%	19%	56%
Cultural or traditional festivals	57%	64%	32%	63%
Exploring Indigenous culture, traditions or history	56%	61%	41%	74%
Kayaking, canoeing or paddle boarding	81%	20%	6%	36%
Travelling to remote destinations	52%	50%	26%	63%
Shopping for clothes/shoes	49%	56%	42%	75%
Guided train tours	39%	52%	23%	62%
Live shows	47%	62%	49%	70%
Cruises	67%	37%	12%	37%
Exploring places most tourists won't go to	43%	47%	22%	65%
Camping	66%	46%	13%	54%
Downhill skiing or snowboarding	n/a	n/a	100%	n/a
Spring blossoms	n/a	n/a	n/a	100%
Breweries or wineries	45%	78%	31%	55%
Guided airplane or helicopter tours	40%	39%	21%	65%
Road cycling	35%	45%	9%	77%
Fishing or hunting	58%	42%	20%	53%
Self-guided driving tours/road trips	50%	57%	24%	74%

	Summer	Fall	Winter	Spring
Shopping for luxury items	55%	59%	51%	73%
Spa or wellness centres	50%	58%	67%	65%
Scuba diving	88%	15%	8%	23%
Music festivals	54%	48%	32%	59%
Nightlife	75%	50%	45%	57%
Golfing	32%	55%	10%	73%
Casual biking	46%	50%	10%	70%
Ziplining	63%	44%	19%	53%
Snowshoeing or cross country skiing	n/a	n/a	100%	n/a
Guided boat tours	66%	34%	14%	40%
Mountain biking	44%	38%	24%	66%
Winter festivals	n/a	n/a	100%	n/a
Sporting events	61%	46%	26%	62%
Agricultural or country farm tours	32%	47%	29%	63%
Renting a recreational vehicle (RV)	60%	44%	12%	46%
Movie festivals	58%	63%	57%	68%
Comedy festivals	48%	38%	51%	49%
Rodeos	46%	36%	29%	67%

* New question in 2021 GTW – no trending.

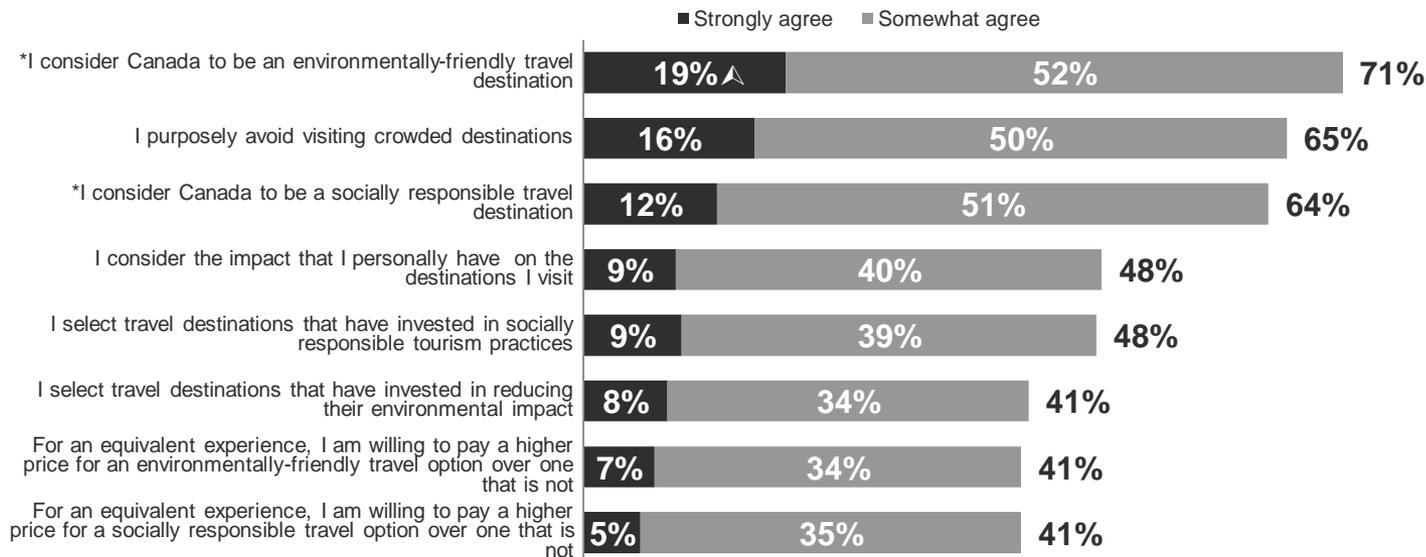
Base: Long-haul pleasure travellers (past 3 years or next 2 years) interested in activity MP10A. Thinking about activities or places you are interested in while on vacation, when would you typically take part in these activities? (Select all that apply) Note that the seasons refer to the destination's seasons.

 >50% of respondents who are interested in the activity would participate in this season

 40-49% of respondents who are interested in the activity would participate in this season

Sustainable Travel

- ▶ Just under half of Japanese travellers say they are thinking about their personal impact on travel destinations, with just slightly fewer saying they would pay more for socially responsible and environmentally-friendly options.
- ▶ A majority of those interested in taking a trip to Canada consider it to be an environmentally-friendly and socially responsible travel destination.
- ▶ However, a much smaller number mention the availability of eco-friendly (17%) or socially responsible (8%) travel options as factors influencing their choice of Canada as a travel destination.¹



▲ / ▼ Significantly higher/lower than 2020 GTW wave.

¹ Data can be found on page 32.

+ Base: Asked among those in the dream to purchase stages of the path to purchase for Canada (n=1035)

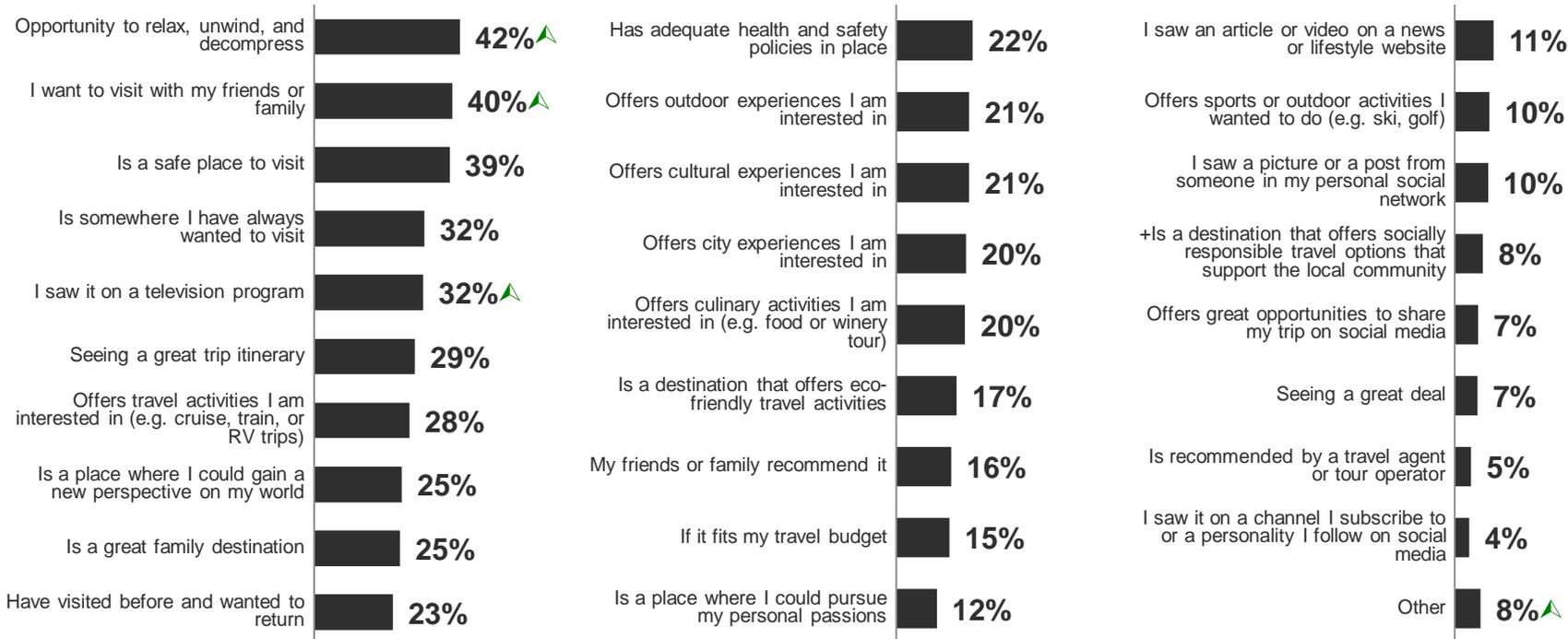
Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1500)

PC31. Sustainable travel refers to "travel that minimises any negative impact 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". Please indicate your level of agreement with each of the following statements ...

Key Characteristics of Future Trips to Canada

Factors Influencing Destination Choice

- ▶ The top factors influencing Japanese travellers to choose Canada as a holiday destination include relaxation opportunities, visiting friends and family, and destination safety.
- ▶ While the top two factors have increased in importance compared to 2020, so has seeing it on a television program.



+ New statement in 2021 GTW – no trending.

Base: Long-haul pleasure travellers (past 3 years or next 2 years) considering Canada (n=261)

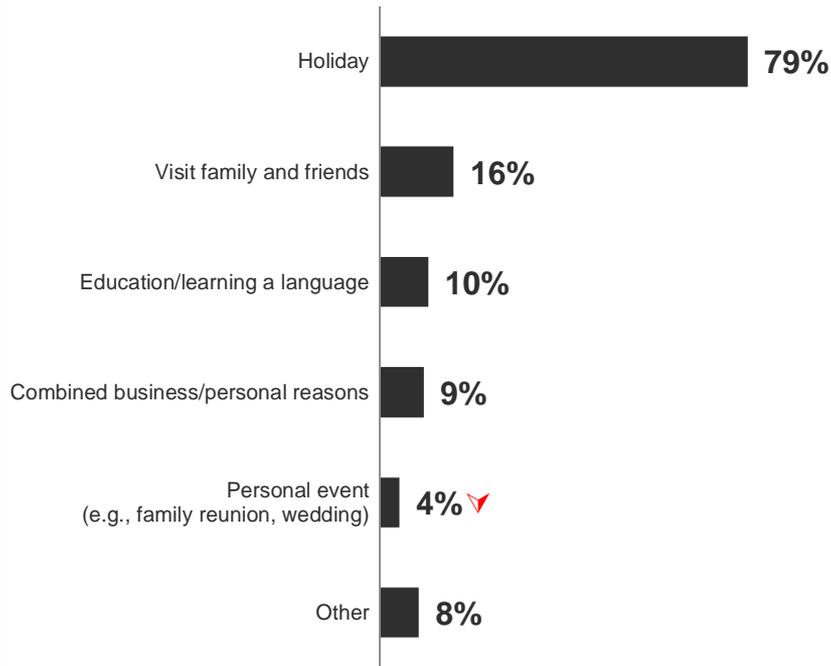
FT3. Which of the following would factor into your choice to travel to Canada? (Select all that apply)

▲ / ▼ Significantly higher/lower than 2020 GTW wave.

Main Purpose and Travel Party of Future Trip

- ▶ Holiday trips will drive Japanese travel to Canada in the next 2 years, with VFR travel (trips to visit friends and relatives) playing a smaller role.
- ▶ Japanese travel parties visiting Canada will be largely made up of immediate family – primarily couples trips or family trips with older children. Intent to travel with friends on a trip to Canada is also high.

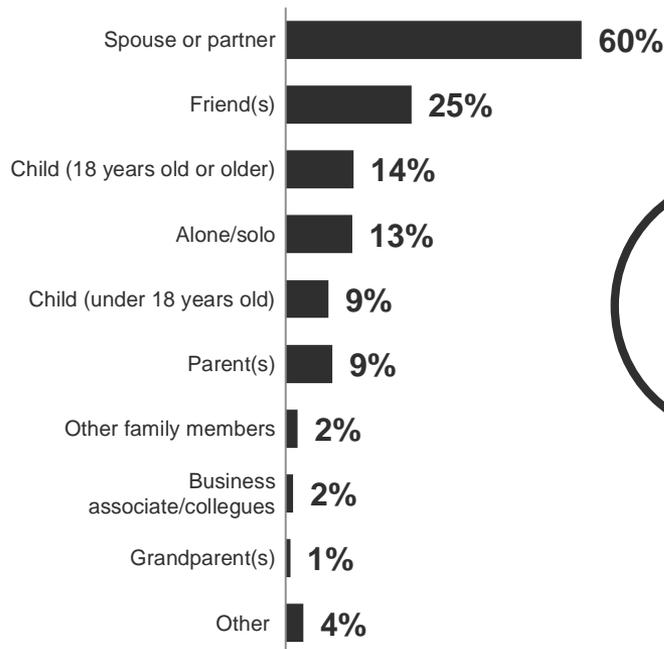
Purpose of Trip



Significantly higher/lower than 2020 GTW wave.

Base: Long-haul pleasure travellers (past 3 years or next 2 years) considering Canada (n=261) FT2. If you took a trip to Canada, what would be the main purpose of this trip?

Travel Party



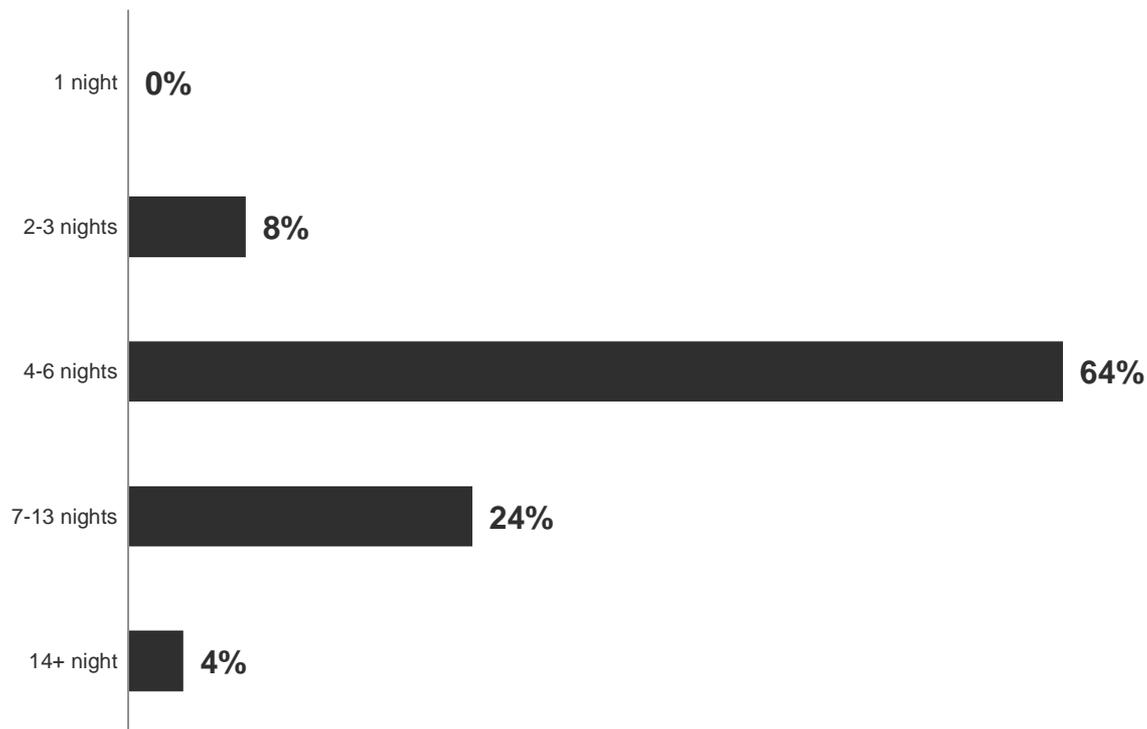
Significantly higher/lower than 2020 GTW wave.

Base: Long-haul pleasure travellers (past 3 years or next 2 years) considering Canada (n=261) FT5. Who would you travel with on a trip to Canada? (Select all that apply)

Would travel with spouse/partner only
39%

Length of Future Trip

► Japanese travellers typically would like to spend at least four nights in Canada, with the greatest preference for a trip of 4-6 nights.



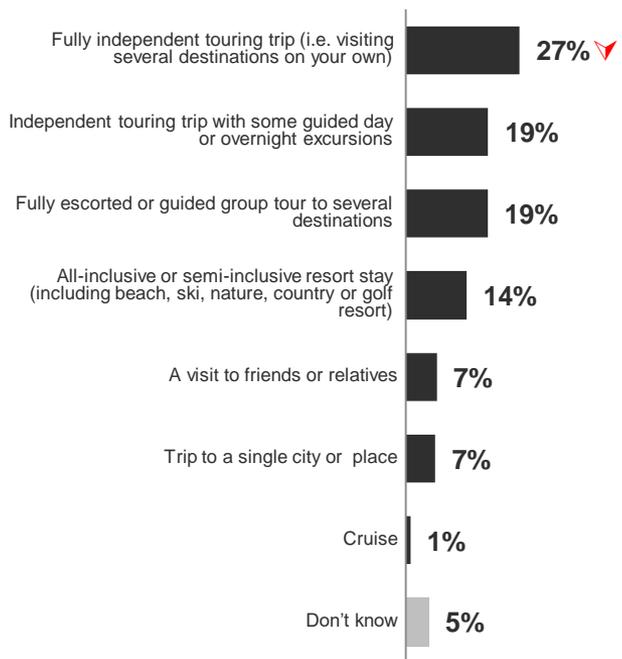
▲ / ▼ Significantly higher/lower than 2020 GTW wave.

Base: Long-haul pleasure travellers (past 3 years or next 2 years) considering Canada (n=261)
FT4. How many nights do you think you would spend on a trip to [destination]?

Trip Type and Accommodation for Future Trip

- ▶ While Japanese travellers still tend to prefer travelling independently on a trip to Canada, the demand for fully independent trips dropped significantly in 2021.
- ▶ Mid-priced hotels are the most preferred type of accommodation for a trip to Canada.

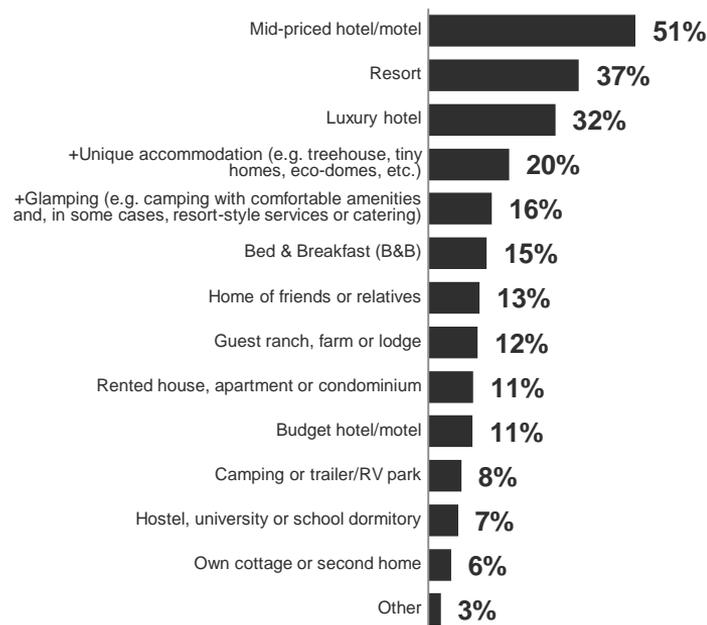
Trip Type



▲ / ▼ Significantly higher/lower than 2020 GTW wave.

Base: Long-haul pleasure travellers (past 3 years or next 2 years) considering Canada (n=261)
FT9. What type of trip do you think you would be most likely to book for a trip to Canada? (Select one)

Type of Accommodation



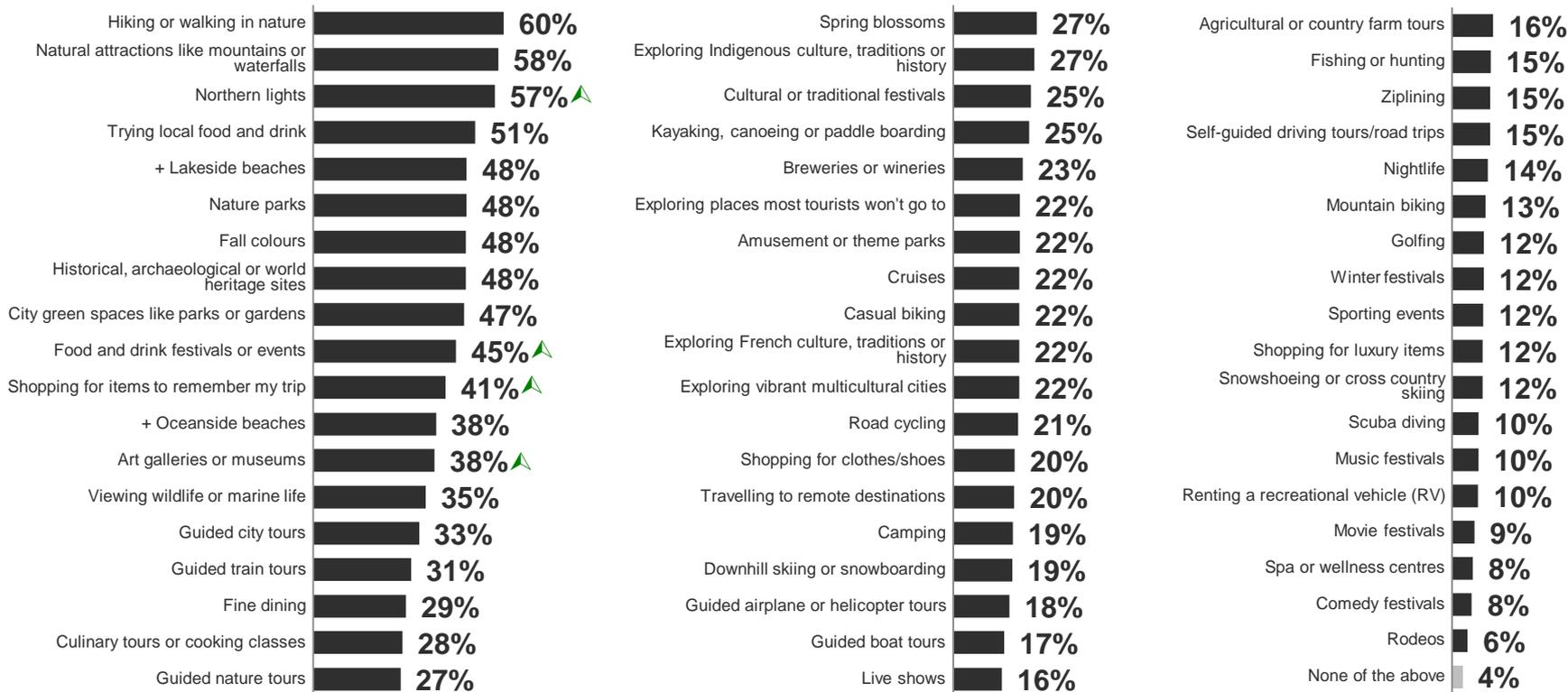
▲ / ▼ Significantly higher/lower than 2020 GTW wave.

+ New statement in 2021 GTW – no trending.

Base: Long-haul pleasure travellers (past 3 years or next 2 years) considering Canada (n=261)
FT10. Which types of accommodation would you consider staying at during a trip to Canada? (Select all that apply)

Activities Interested in on Future Trip to Canada

▶ Japanese travellers' interest in viewing the Northern lights in Canada increased significantly in 2021 and is now the #3 activity of interest for a trip to Canada. This presents a strong opportunity for Canada, as viewing the Northern lights is also the top activity that they would base a trip around. There is also a strong preference among Japanese travellers for other nature-based activities on a trip to Canada.



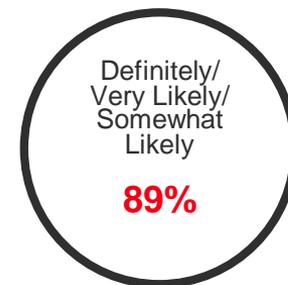
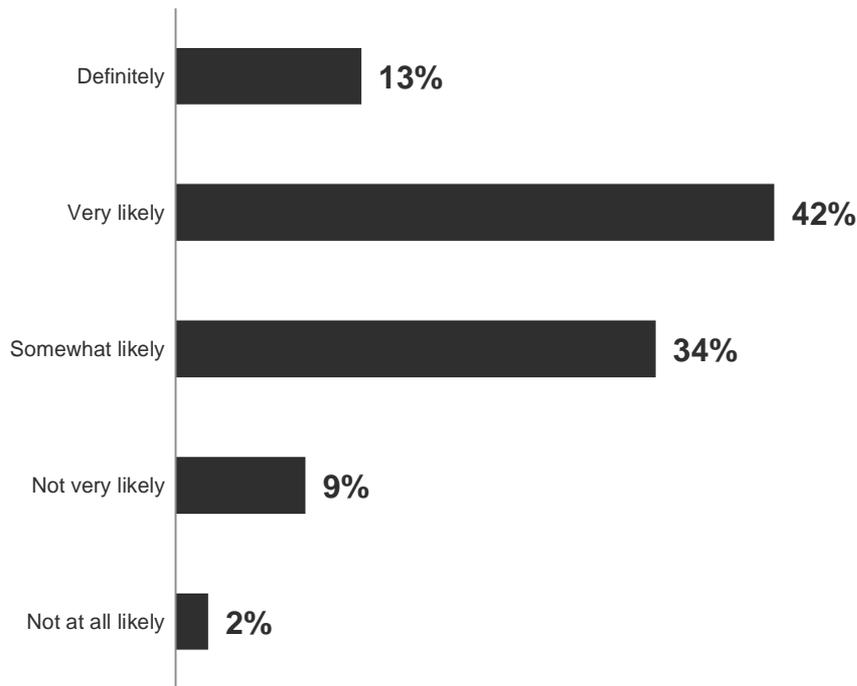
+ New statement in 2021 GTW – no trending.

Base: Long-haul pleasure travellers (past 3 years or next 2 years) considering Canada (n=261)
FT11. What activities would you be interested in participating in during a trip to Canada? (Select all that apply)

▲ ▼ Significantly higher/lower than 2020 GTW wave.

Travel Agent Usage for Future

- ▶ Travel agents and tour operators play a substantial role in supporting travel from Japan to Canada, with a large majority of potential Japanese visitors indicating that they are likely to use a travel agent to research or book a trip to Canada.



▲ / ▼ Significantly higher/lower than 2020 GTW wave.

Base: Long-haul pleasure travellers (past 3 years or next 2 years) considering Canada (n=261)

FT6. 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. How likely are you to use a travel agent or tour operator to help you research or book a trip to [destination]?