2.3 million Japanese long-haul leisure travellers intend to visit Canada in the next two years.

Market Insights

Trip Type
Japanese travellers want to be assured of their health and safety while travelling. For this reason, group travel may take longer to return, with many preferring small groups or fully independent travel options in the near term.

Wellbeing
Canada is seen as an ideal destination for Japanese visitors, with wide-open spaces, nature and a focus on wellbeing and rejuvenation.

Values Alignment
There is increasing awareness and attention among Japanese travellers toward sustainable and responsible travel options. Canada is well positioned as a destination that leads in these areas, connecting people to the communities they visit and inspiring purposeful travel.

Market Potential¹

Canada’s target market
10,829,000

21% are definitely/very likely to visit Canada in the next 2 years

2,295,500
Canada’s immediate potential in the next 2 years

Demographics¹

Age

<table>
<thead>
<tr>
<th>Age</th>
<th>18-34</th>
<th>35-54</th>
<th>55+</th>
</tr>
</thead>
<tbody>
<tr>
<td>%</td>
<td>23%</td>
<td>23%</td>
<td>54%</td>
</tr>
</tbody>
</table>

Annual Household Income

<table>
<thead>
<tr>
<th>Income Range</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than JPY 5M</td>
<td>34%</td>
</tr>
<tr>
<td>JPY 5M to under JPY 10M</td>
<td>34%</td>
</tr>
<tr>
<td>JPY 10M to under JPY 20M</td>
<td>15%</td>
</tr>
<tr>
<td>JPY 20M or more</td>
<td>3%</td>
</tr>
</tbody>
</table>

Children

<table>
<thead>
<tr>
<th>Has Children</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>17%</td>
</tr>
<tr>
<td>No</td>
<td>83%</td>
</tr>
</tbody>
</table>

Seasonal Demand¹,²

- 2019 Actual Arrivals
- 2021 Total Demand (%)

- Opportunity Period:
  - Jan-Feb: 7%
  - Mar-Apr: 8%
  - May-Jun: 15%
  - Jul-Aug: 32%
  - Sep-Oct: 26%
  - Nov-Dec: 11%

¹ Global Tourism Watch 2021.
Top Motivators for Future Trip to Canada

- Opportunity to relax, unwind, and decompress: 42%
- I want to visit with my friends or family: 40%
- Is a safe place to visit: 39%
- Is somewhere I have always wanted to visit: 32%
- I saw it on a television program: 32%

Top Barriers to Canada

- Cost: 24%
- Too far/flight too long: 20%
- Don’t know enough about it: 17%
- There is no reason to visit anytime soon: 15%
- There are other places I would rather visit: 15%

Top Activities of Interest for Future Trip to Canada

- Hiking or walking in nature: 60%
- Natural attractions like mountains or waterfalls: 58%
- Northern lights: 57%
- Trying local food and drink: 51%
- Lakeside beaches: 48%
- Nature parks: 48%
- Fall colours: 48%
- Historical, archaeological or world heritage sites: 48%
- City green spaces like parks or gardens: 47%
- Food and drink festivals or events: 45%

Travel Agent Usage for Future Trip to Canada

NET Definitely / Very / Somewhat Likely: 89%

Travel Consideration by Province, % Likely to Visit by Region (Next 2 Years)

- BC: 49%
- AB: 37%
- SK: 14%
- MB: 15%
- ON: 60%
- QC: 47%
- ATL: 28%

Net Promoter Score (Normalized)

- Italy
- Switzerland
- Finland
- Spain
- Australia
- France
- Canada
- Sweden
- United States
- United Kingdom
- Germany
- Netherlands
- Russia
- India

For further information, please contact:
Masayo Hando
Managing Director
T +81-90-6181-1694
hando.masayo@destinationcanada.com

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1 Global Tourism Watch 2021.