Japan Market Highlights – Facts at a Glance

Close to 3 million Japanese long-haul pleasure travellers intend to visit Canada in the next two years.

2017 Performance

- Arrivals\(^1\): 304K (\(\rightarrow\) 0%)
- Average Trip Spend\(^2\): $2,055

Despite gradual growth in Japan’s GDP and consumer expenditures, the decreasing value of the Yen relative to the Canadian dollar may have contributed to 2017’s muted arrivals performance.

Market Insights

Japanese residents are high yield travellers to Canada, spending an estimated $2,055 per trip in 2017.\(^2\)

In 2017, Japanese tourists were more likely than the average overseas traveller to visit Canada in late Winter and Fall months, with natural experiences such as the Northern Lights and fall colours motivating travel.\(^5\)

Three-quarters of recent Japanese visitors consulted a travel agent for their trip to Canada, with the majority using them to book flights and accommodation.\(^5\)

2018 Forecast

- Visitor Forecast\(^2\): 314K (\(\uparrow\) 3%)
- Spend Forecast\(^2\): $623M (\(\uparrow\) 4%)

- Airline Seat Capacity\(^3\): \(\downarrow\) 3%
- Local Currency vs CAD\(^4\): \(\downarrow\) 2.5%

Channel Investment Mix

21% Travel Trade
79% Consumer Direct & Earned Media

Travel Seasons\(^1\)

% of arrivals to Canada by month

- Japan
- Destination Canada Market Average

Jan: 5%  Feb: 7%  Mar: 8%  Apr: 5%  May: 7%  Jun: 9%  Jul: 10%  Aug: 14%  Sep: 12%  Oct: 11%  Nov: 6%  Dec: 5%
### Market Potential

10,328,000  
Canada’s target market

25%  
are definitely/very likely to visit  
Canada in the next 2 years

2,551,000  
Canada’s immediate potential

### Top Drivers

1. Allows me to de-stress
2. Beautiful outdoor scenery and landscapes
3. Cities are great for exploring and soaking in the atmosphere
4. Spend quality time with friends and/or family
5. People are friendly and welcoming
6. Summer outdoor activities I would participate in
7. Great shopping
8. Combines both outdoor activities and city experiences
9. Experience things that I can’t experience at home
10. Great dining/food experiences

### Target Audiences

#### Free Spirits 25-34

They are defined by the places they have travelled to and their experiences there. They want to visit cool places and have experiences that they can’t at home.

**Key themes**

Educate and inspire through unique Canadian experiences aligned to passion points, and showcase simple itineraries that are easy to action.

- Experiencing unique Canadiana
- Fulfilling passions through the Canadian experience
- Experiencing vibrant cities

#### Cultural History Buffs 55+

They seek out activities that align with their passions, and want to find new and unique things in their travels that they can share with friends and family.

**Key themes**

Build awareness and drive conversion of off-peak travel featuring a combination of iconic and lesser-known experiences.

- Experiencing unique Canadiana
- Experiencing vibrant cities

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1. Statistics Canada, Frontier Counts, 2017
2. Destination Canada Research estimates, using Statistics Canada preliminary Q1-Q3 ITS, Frontier Counts and e311 adjusted data (April 2018)
3. IATA SRS Analyzer Data, March 2018
4. Tourism Economics, March 2018
5. Global Tourism Watch 2017

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