

# 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<sup>1</sup>

**304K** (→ 0%)



Average Trip Spend<sup>2</sup>

**\$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.

## 2018 Forecast



Visitor Forecast<sup>2</sup>

**314K** (↑ 3%)



Spend Forecast<sup>2</sup>

**\$623M** (↑ 4%)



Airline Seat Capacity<sup>3</sup>

↓ **3%**



Local Currency vs CAD<sup>4</sup>

↓ **2.5%**

## Market Insights



Japanese residents are high yield travellers to Canada, spending an estimated \$2,055 per trip in 2017.<sup>2</sup>



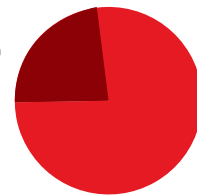
In 2017, Japanese tourists were more likely than the average overseas traveller to visit Canada in late Winter and Fall months<sup>7</sup>, with natural experiences such as the Northern Lights and fall colours motivating travel.<sup>5</sup>



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.<sup>5</sup>

## Channel Investment Mix

**21%**  
Travel Trade

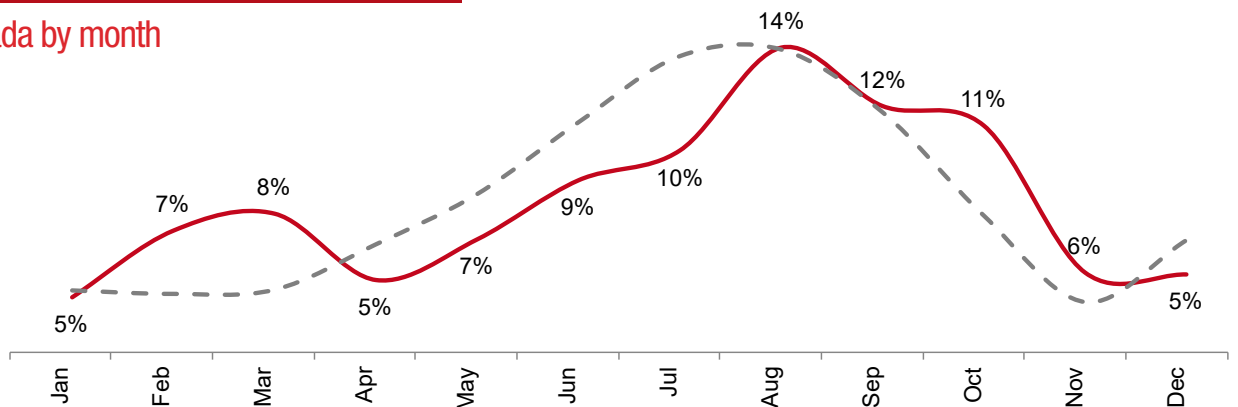


**79%**  
Consumer Direct  
& Earned Media

## Travel Seasons<sup>1</sup>

% of arrivals to Canada by month

- Japan
- Destination Canada Market Average



## Market Potential<sup>5</sup>



**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<sup>5</sup>

The main features that Japanese travellers desire in a destination are...

- 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

Experiencing Canadian culture through iconic natural and urban attractions that are unique to the country.



#### Fulfilling passions through the Canadian experience

Generate excitement about Canada through experiences and destinations that are aligned to traveller passions.



#### Experiencing vibrant cities

Discovering the unique shopping, culinary, and cultural icons that make Canada's cities so remarkable.



### 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.

Canada

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<sup>1</sup> Statistics Canada, Frontier Counts, 2017

<sup>2</sup> Destination Canada Research estimates, using Statistics Canada preliminary Q1-Q3 ITS, Frontier Counts and e311 adjusted data (April 2018)

<sup>3</sup> IATA SRS Analyzer Data, March 2018

<sup>4</sup> Tourism Economics, March 2018

<sup>5</sup> Global Tourism Watch 2017