2019 MARKET HIGHLIGHTS | Japan

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

2018 Performance

- **2018 Arrivals**: 251,240 (↓14.9%)
- **2018 Average Trip Spend**: $1,810

Key Insights

- As concerns over slowing global growth and financial market turmoil weighed against consumer confidence, arrivals from Japan declined in 2018 (-15%), particularly air arrivals, as direct air capacity between Japan and Canada also retracted (-4%).
- Among all of Destination Canada’s markets, Japan boasts the highest proportion of travellers visiting Canada between October and March when Aurora viewing is popular. Tour operators also increased new winter products including Canadian Rockies, Christmas in cities and festivals in Eastern Canada.

2019 Forecast

- **Visitor Forecast**: 242,440 (↓3.5%)
- **Spend Forecast (CAD)**: $416 M (↑1.3%)

Market Insights

- Japanese leisure travellers are most interested in visiting Canada between July and August (30% of travellers) and September-October (28%).
- Japanese leisure travellers are most interested in participating in nature-based experiences – seeing mountains or waterfalls, witnessing the northern lights, visiting nature parks and immersing themselves in the fall colours. City, culinary and historical themes are also popular to combine with nature-based experiences.
- 44% of recent Japanese leisure travellers to Canada booked their entire trip as part of an organized group travel package, via a travel agent/tour operator online or in-person.

Seasonal Demand

- **2018 Actual Arrivals**
- **Total Demand (%)**


5. Global Tourism Watch 2018.
6. OECD.
# 2019 Market Highlights | Japan

## Market Potential
Canada’s target market: 10,750,500
27% are definitely/very likely to visit Canada in the next 2 years
Canada’s immediate potential: 2,859,500

## Top Drivers for Japanese Travellers to Any Destination
1. Is a place that allows me to de-stress
2. Has great shopping
3. Has people that are friendly and welcoming
4. Its cities are great for exploring and soaking in the atmosphere
5. Has beautiful outdoor scenery and landscapes
6. Is a safe place to visit
7. Is a place where I can experience things that I can’t experience at home
8. Offers distinctive experiences during all 4 seasons
9. Has great dining and food experiences
10. Its cities have a lot of great attractions to see and do

## Travel Consideration by Province, % Likely to Visit Region

<table>
<thead>
<tr>
<th>Province</th>
<th>% Likely to Visit</th>
</tr>
</thead>
<tbody>
<tr>
<td>BC</td>
<td>60%</td>
</tr>
<tr>
<td>AB</td>
<td>39%</td>
</tr>
<tr>
<td>SK/MB</td>
<td>22%</td>
</tr>
<tr>
<td>ON</td>
<td>61%</td>
</tr>
<tr>
<td>QC</td>
<td>47%</td>
</tr>
<tr>
<td>ATL</td>
<td>26%</td>
</tr>
</tbody>
</table>

## Travel Agent/Tour Operator Usage For Recent Trip to Canada

<table>
<thead>
<tr>
<th>Usage</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Used for either research or booking</td>
<td>72%</td>
</tr>
<tr>
<td>Used for both research and booking</td>
<td>29%</td>
</tr>
<tr>
<td>Used for research only</td>
<td>22%</td>
</tr>
<tr>
<td>Used for booking only</td>
<td>21%</td>
</tr>
</tbody>
</table>

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*Global Tourism Watch 2018.*