



While economic challenges remain, Canada saw strong year-over-year growth in off-peak travel from Japan.

Japan’s recovery has been slower than most markets, ahead of only China in pace. However, year-over-year growth has been strong, especially in shoulder seasons. Spending is expected to recover by 2027, even as visits are not projected to reach 2019 levels by 2030 due to long-term demographic and economic constraints.

- The Yen's depreciation has made Canada a relatively expensive destination, though recent gains in the currency have helped. Economic growth is expected to be solid in 2025.
- Spending by Japanese visitors is forecasted to grow 32.2% in 2025.
- Visitor numbers will rise 19.6% in 2025, though will remain below pre-pandemic levels.
- In 2026, Canada is projected to welcome 204,700 Japanese visitors, spending \$491 million.

Spending and visitation levels (% relative to 2019)¹

	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030
Spend	100	12	12	34	48	60	80	98	106	111	115	120
Visitation	100	12	5	20	45	56	67	82	88	91	94	96

0%-50% 51%-75% 76%-100% 101%-120% 121%+

There is an unprecedented economic opportunity from a growing tourism industry, but there is significant potential for disruption in 2025. To remain resilient, our industry must reinforce that Canada remains open and friendly.

Potential Market Size²

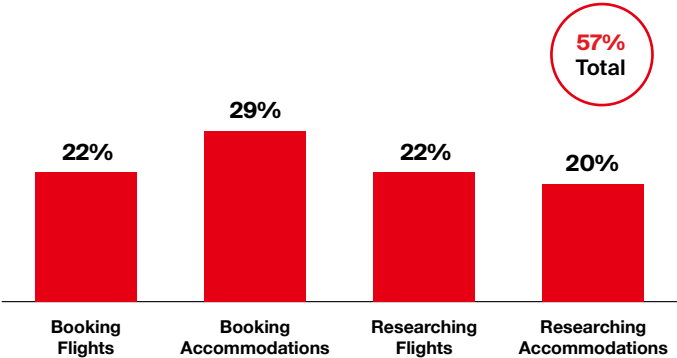


Total potential for long-haul travellers

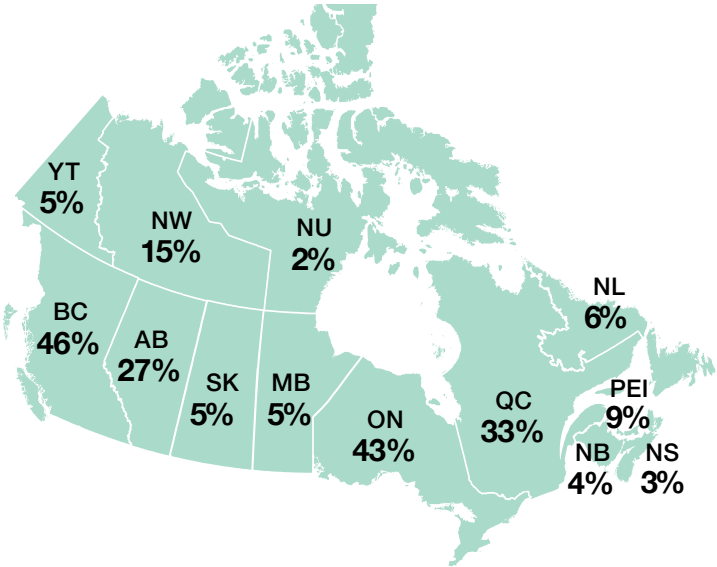


Canada's immediate potential

Use Travel Agent on Canada Trip²



Likelihood to Visit Canadian Regions (Next 2 Years)



The DC Tourism Outlook Fall 2023 has been adjusted from 2023 to 2025 to reflect the latest arrival numbers.
¹ Destination Canada Tourism Outlook 2025-2030
² Destination Canada Global Traveller Research Program 2024



In Japan, there are two key priority segments selected through advanced analysis of their alignment to Canada’s product offerings, their potential economic impact, brand alignment, and their ability to benefit Canadian communities.



Japan Priority Segment

REFINED GLOBETROTTERS

% Of Japan Adult Population

8%

% Of Japan Visitors to Canada

23%

% Of Japan Spend to Canada

29%

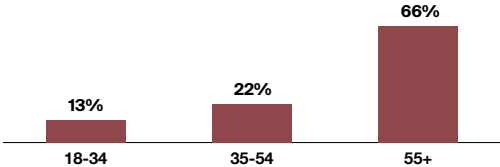
We prioritize travel above all, indulging in world-class destinations, gourmet dining, and exclusive experiences. We are experienced travellers who are always on the lookout for new, unique places to cross of our list.

TOP CANADA ACTIVITIES

- Local Cuisine
- Cultural Experiences & Attractions
- Shopping
- Guided Tours
- Nature Experiences

Type of Travel Trade	Level of Use (compared to rest of market)
Travel Trade for group travel	★★★★★ (Very High)
Travel Trade for non-group travel	★★★★★ (Very High)

AGE





Japan Priority Segment

OUTDOOR EXPLORERS

% Of Japan Adult Population

7%

% Of Japan Visitors to Canada

18%

% Of Japan Spend to Canada

21%

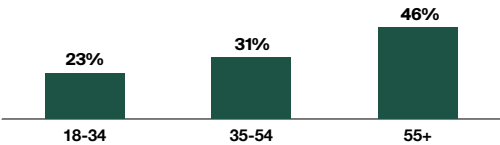
We are nature explorers who crave the thrill of unknown landscapes and overcoming challenges. Adventure travel allows us to grow, learn new skills, and establish personal traditions.

TOP CANADA ACTIVITIES

- Guided Tours
- Nature Experiences
- Winter Based Sports

Type of Travel Trade	Level of Use (compared to rest of market)
Travel Trade for group travel	★★★★★ (Very High)
Travel Trade for non-group travel	★★★★☆ (Average)

AGE



Source: Destination Canada Traveller Segmentation Program 2024

Note: Segment sizing estimates will differ from those in the Global Traveller Research Program (GTRP), which applies stricter screening criteria—specifically a more narrowly defined long-haul traveller profile.

For further information, please contact:

Masayo Hando | Managing Director | T +81-90-6181-1694 | hando.masayo@destinationcanada.com