



INTERNATIONAL MARKET FOCUS

JAPAN

Fall 2023

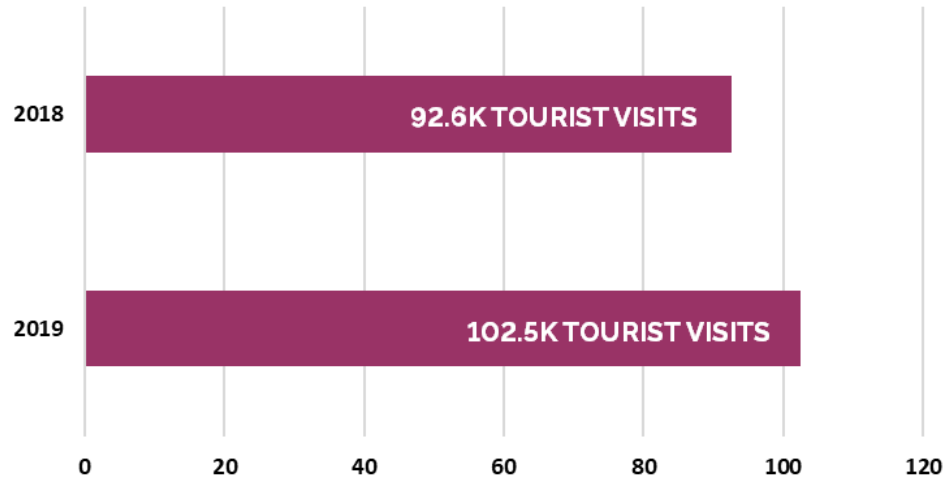
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MARKET SIZE

- There were **102,500 tourist visits from Japan to Ontario** in 2019 (+11% over 2018). Most Japanese tourist visits to Ontario included a visit to Niagara (Region 2) in 2019 (56%) – a higher proportion than any of Ontario's other overseas markets.
- On average, Japanese tourists stayed **16 nights** per overnight Ontario visit in 2019.
- Japan accounted for **3% of all overseas visits to Ontario** in 2019.

JAPANESE VISITS IN ONTARIO

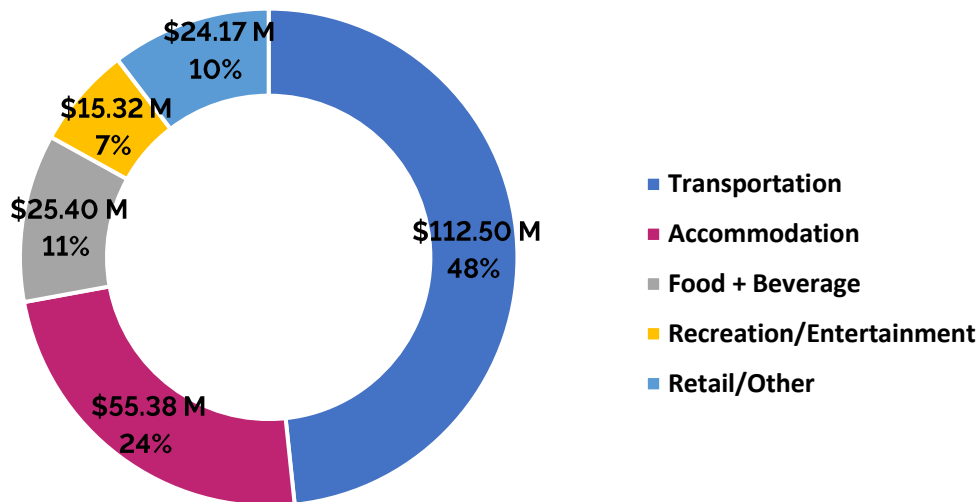


Source: Statistics Canada, Visitor Travel Survey

VISITOR SPENDING

- Japanese visitor spending in Ontario totalled **\$232.8 million** in 2019 (+6% from 2018).
- Japan accounted for **4% of overseas spending in Ontario** in 2019.
- Japanese tourists spent an average of **\$2,271 per visit in Ontario** in 2019 – **over 10 times more** than the average spend per visit in Ontario. Nearly half of visitor spending was on **transportation (48%)**.
- Destination Canada has estimated that it may take until 2026 for Japanese tourism spending in Canada to recover to 2019 levels.

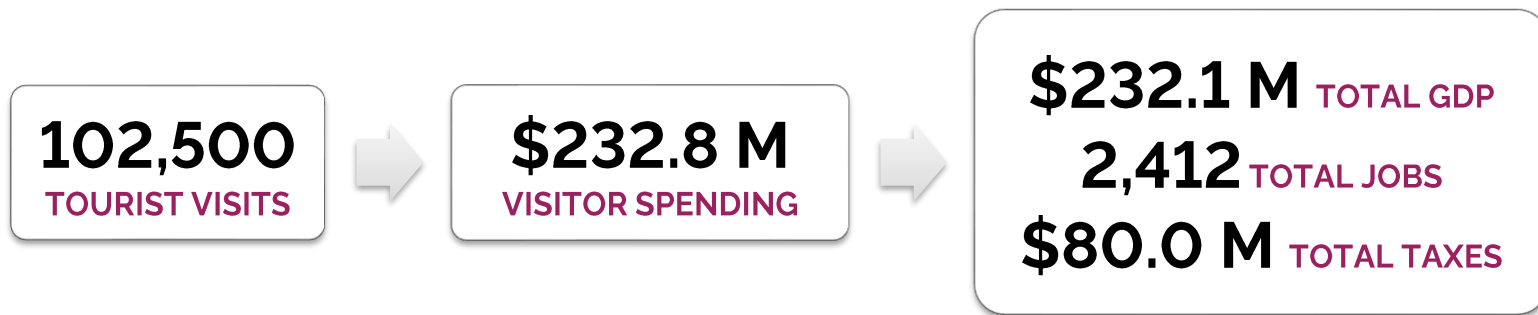
JAPANESE SPENDING BY CATEGORY: 2019



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THE VALUE OF THE JAPANESE TRAVELLER

ECONOMIC IMPACT OF VISITOR SPENDING FROM JAPAN IN ONTARIO (2019)



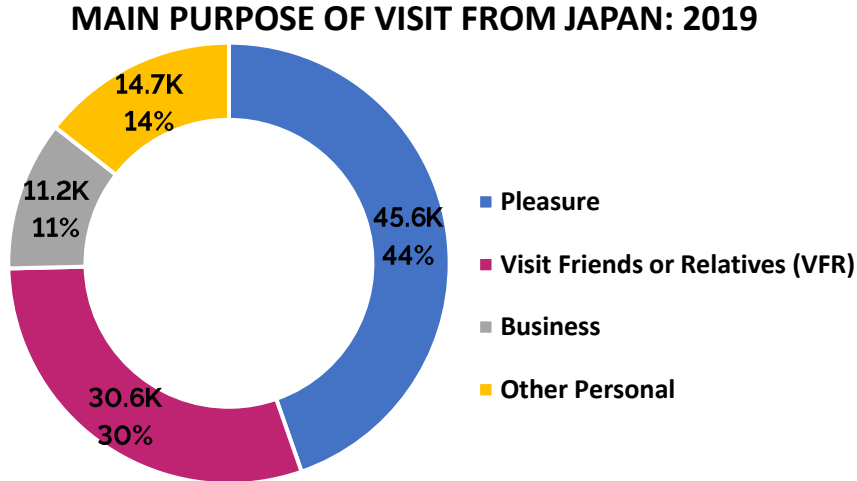
Source: Statistics Canada, Visitor Travel Survey (2019) and the Ontario Ministry of Tourism, Culture and Sport's Tourism Regional Economic Impact Model



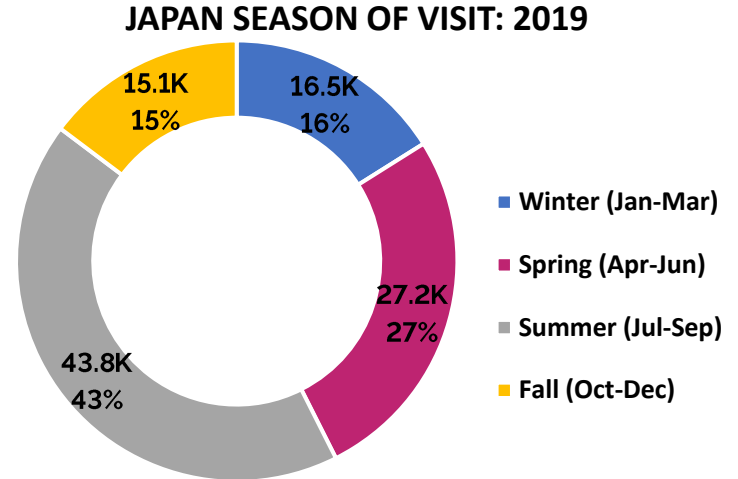
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TRIP CHARACTERISTICS

- **44%** of tourist visits from Japan to Ontario were taken for **pleasure**



- **43%** of tourist visits from Japan to Ontario occurred in the **summer**



Source: Statistics Canada, Visitor Travel Survey

TRIP CHARACTERISTICS

TOP TRIP ACTIVITIES IN ONTARIO (2019)

TRIP ACTIVITY	% JAPANESE VISITS IN ONTARIO
Restaurant, bar or club	97%
Shopping	85%
Sightseeing	85%
National or provincial nature park	47%
Historic site	43%

Source: Statistics Canada, Visitor Travel Survey

TOP TOURISM REGIONS VISITED (2019)

TOURISM REGION	% JAPANESE VISITS IN ONTARIO
Region 5: Greater Toronto Area	74%
Region 2: Niagara Canada	56%
Region 10: Ottawa and Countryside	8%
Region 3: Hamilton, Halton, Brant	4%
Region 6: York, Durham, Hills of Headwaters	3%

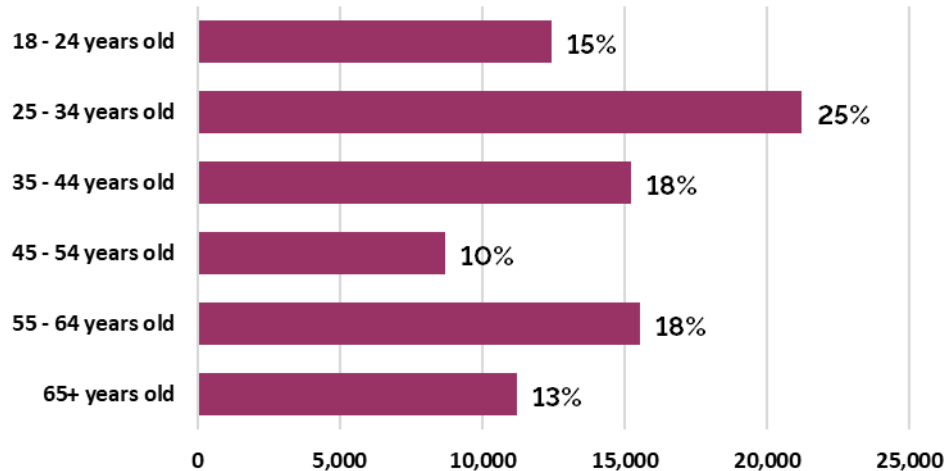


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DEMOGRAPHICS

- The largest share of Japanese tourist visits to Ontario was from those aged 25-34 years old in 2019 (25%). **The average age of a Japanese tourist to Ontario was 43.**
- 10% of travel parties from Japan to Ontario had children travelling with them in 2019.
- Of those who stated their gender, slightly more than half (54%) of visits from Japan to Ontario were taken by women in 2019.

JAPANESE VISITS TO ONTARIO BY AGE STATED (18+): 2019



Source: Statistics Canada, Visitor Travel Survey



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POTENTIAL MARKET SIZE FOR CANADA



Total potential long-haul[^]
pleasure travellers aged
18 years or more



Target Market for Canada



Those in the dream to
purchase stages of the path
to purchase for Canada

Size of the target
market



Immediate Potential
for Canada



Will definitely/very likely visit
Canada in the next 2 years¹

Immediate potential



Source: Destination Canada 2022 Global Markets Traveller Incidence & Market Sizing Update

[^] Long-haul = outside of East Asia (e.g., China, Hong Kong, Macau, Japan, South Korea and Taiwan) | ¹ Includes respondents likely to visit Canada for a trip of 1 to 3 nights, or a trip of 4 nights or more





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