

**Canada is having a global moment.** Our brand reputation is strong, and our standing in highly respected global reputation rankings is soaring. Brand reputation directly influences whether travellers consider and choose Canada over other destinations. Canada's new *Canada, naturally.* brand platform sets the expectation that travel in Canada is real and authentic. Travellers can expect memorable experiences in nature, shaped by the openness of Canadians. That expectation builds trust when travellers experience that promise firsthand in Canada.

Against that backdrop, macroeconomic uncertainty persists and may contribute to rapid shifts in economic indicators and market sentiment.



## Macro Trends

Asia presents a mixed but significant opportunity for Canada. Economic conditions vary across the region, but generally support strong outbound travel. South Korea's economy and consumer confidence are supporting strong travel demand. In Japan, economic conditions are constraining outbound travel overall, but they still present an opportunity among more affluent travellers. China's economic growth remains moderate as the economy matures, but the reopening of outbound travel continues to stimulate international demand. Over the long term, income and wealth are expected to continue rising in China, and the number of households able to afford travel will continue to expand. By 2030, China is expected to overtake the US as the world's largest leisure travel market.<sup>1</sup>



## Travel trends

The forecast for outbound leisure travel in the Asian markets remains strong, with a 27% increase in volume expected from China in 2026, the largest increase among all of Destination Canada's core markets. South Korea and Japan also continue to show positive outbound travel momentum, with growth of 10% and 3% forecast, respectively.<sup>2</sup>

While outbound travel in Japan is expected to grow, recovery lags behind other East Asian markets due to rising living costs and a weak currency. Value for money is the strongest driver of long-haul destination choice for Japanese travellers, but for Canada, key motivators include values, such as openness to new ideas, distinctive nature and cultural experiences, relaxation opportunities and ease of access.<sup>3</sup>

Chinese travellers are increasingly blending digital and traditional planning pathways. The use of artificial intelligence (AI) for travel planning is rising rapidly—outpacing most other markets. At the same time, reliance on travel agents continues to be high.<sup>3</sup> With Approved Destination Status (ADS) restored for Canada in November 2025, group tours are expected to pick up in the coming years. This reinforces the importance of reaching travellers through both AI-driven discovery and trade channels.

Korean travellers are increasingly shifting toward experiential travel that reflects their values, with a growing preference for more meaningful, immersive experiences. At the same time, “set-jetting” is significantly boosting interest in Canada. Popular TV shows filmed in Canada, such as *Can This Love Be Translated*, are driving strong demand, supported by tailored itineraries designed to bring these stories to life.<sup>4</sup>



## Implications for Canada

In terms of entry requirements, most Chinese travellers require a visa to enter Canada, making early planning and clear documentation critical for conversion. Most Japanese and South Korean travellers require only an electronic travel authorization (eTA) when flying to Canada.

Arrivals to Canada via land and water from the US have declined materially over the past year, down 5.1% for China and 4.3% for both South Korea and Japan.<sup>5</sup> This increases the importance of direct air capacity and routing through non-US hubs, amid reduced demand for dual-destination US trips. Direct air capacity is rising but remains constrained in the Chinese market; the number of available seats on direct flights in 2026 is projected to be only 40% of 2019 levels. However, this is balanced by strong growth in air capacity from South Korea and Japan at 163% and 161% of pre-pandemic levels.<sup>6</sup> Air arrivals from fall 2025 indicate increasing interest from Asian markets to visit Canada during this season.<sup>5</sup>

For Canadian sellers, the immediate opportunity is to match product and messaging to market readiness. Now that Canada's Approved Destination Status has been restored in China, the market needs to leverage both experienced group organizers and premium independent travel products. Japan needs compelling itineraries that justify long-haul value, and South Korea needs premium, experience-led offers. Staying visible in these markets through AI-discoverable content, trade relationships and international distribution channels ensures that Canadian businesses are well positioned to capture demand as growth re-accelerates.

<sup>1</sup> Tourism Economics Tourise, November 2025

<sup>2</sup> Destination Canada Tourism Outlook, 2026

<sup>3</sup> Global Traveller Research Program, 2025

<sup>4</sup> Travel Alberta, <https://www.travelalberta.com/trip-ideas/road-trips-itineraries/can-this-love-be-translated-filming-locations>

<sup>5</sup> Statistics Canada Frontier Counts (IPI Air integration restated for 2024), 2025

<sup>6</sup> OAG Traffic Analyzer, April 2026



- Leisure outbound travel volume is projected to grow +26% YoY in 2026, the highest out of all Destination Canada core markets.<sup>1</sup>
- Most Chinese travellers require a visa to enter Canada, making early planning and clear documentation critical for conversion.
- The Chinese yuan is expected to remain relatively stable against the CAD, with potential weakness tied to domestic economic pressures.
- Being a place that is easy to get to is the strongest overall driver of destination choice for Chinese travellers, followed by strong value for money. When considering Canada specifically, safety is the top driver for destination choice.<sup>2</sup>
- China reinstated Canada's Approved Destination Status in November 2025, resuming Chinese group tours after a 2023 suspension. While travel to Canada is expected to increase, slower growth in air capacity represents a key constraint.
- Compared to 2025, direct air capacity in 2026 is forecast to increase +27% YOY, which translates to just under 650,000 available seats; this is up three fold from the seats available in 2024. Compared to 2019 levels, air capacity is at 40%.<sup>3</sup>

### Canada spend and visitation levels (% increase relative to 2025)<sup>4</sup>

	2025*	2026	2027	2028	2029	2030
Spend	\$1.15B	+32%	+73%	+120%	+171%	+204%
Visitation	317K	+27%	+62%	+100%	+139%	+158%

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

Spend and visitation are both forecast to grow by 2030, with spend expected to outpace visitor growth. Compared to 2025 levels, visitation is projected to increase by 158%, from 316.5k to 817k visitors, while spend is expected to grow by 204%, from \$1.15B to \$3.50B.

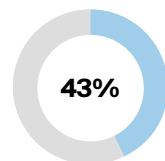
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### Canada's Opportunity

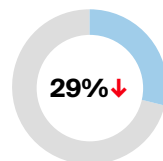


Canada's total opportunity in next 2 years (definitely/very likely to visit)<sup>2</sup>

### Organized group tour on Canada trip (past 3 years)<sup>2</sup>



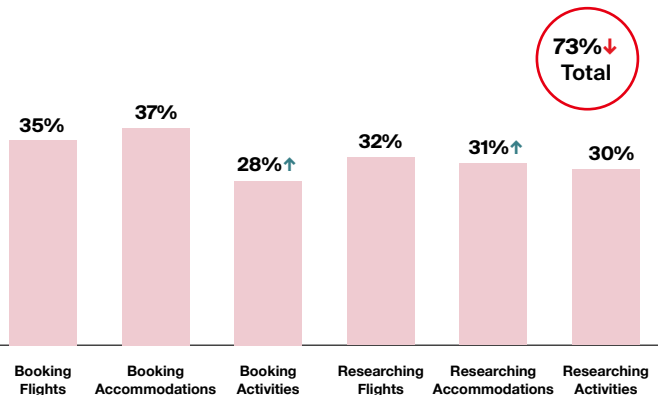
Yes, whole trip



Yes, portion of trip

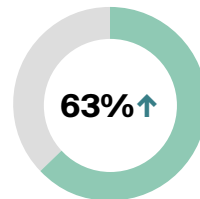
Organized group tours also play a meaningful role in this market, with travellers more likely to join a group tour for their full trip.

### Use travel agent/tour operator on Canada trip (past 3 years)<sup>2</sup>



Nearly three-quarters of travellers (73%) used a travel agent or tour operator for their recent trip to Canada. While this is down from 81% in 2024, it still reflects a strong reliance on travel trade.

### Use AI tools to research, plan and book trips<sup>2</sup>



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<sup>1</sup> Oxford Economics Global Traveller Services, 2026

<sup>2</sup> Global Traveller Research Program, 2025

<sup>3</sup> OAG Traffic Analyzer, April 2026

<sup>4</sup> Destination Canada Tourism Outlook, 2026

\*2025 figures are Destination Canada forecasts and may differ slightly from final arrival and spend data.

↑/↓ significant increase/decrease vs. previous year



## REFINED GLOBETROTTERS

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.

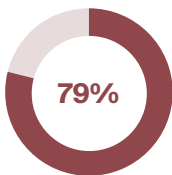
### Refined Globetrotters segment size<sup>2</sup>



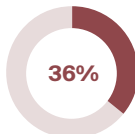
### Canada's Refined Globetrotters opportunity in next 2 years (definitely/very likely to visit)<sup>2</sup>



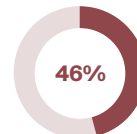
### Use travel agent/tour operator on Canada trip (past 3 years)<sup>5</sup>



### Organized group tour on Canada trip (past 3 years)<sup>5</sup>

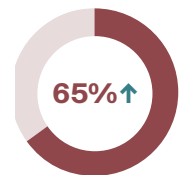


Yes, whole trip



Yes, portion of trip

### Use AI tools to research, plan and book trips<sup>2</sup>



## OUTDOOR EXPLORERS

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.

### Outdoor Explorers segment size<sup>2</sup>



### Canada's Outdoor Explorers opportunity in next 2 years (definitely/very likely to visit)<sup>2</sup>



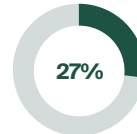
### Use travel agent/tour operator on Canada trip (past 3 years)<sup>5</sup>



### Organized group tour on Canada trip (past 3 years)<sup>5</sup>

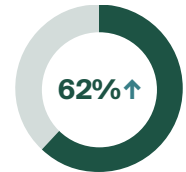


Yes, whole trip



Yes, portion of trip

### Use AI tools to research, plan and book trips<sup>2</sup>



<sup>2</sup> Global Traveller Research Program, 2025

<sup>5</sup> Global Traveller Research Program, 2024 & 2025

↑/↓ significant increase/decrease vs. previous year

**For further information, please contact:**

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- Leisure outbound travel volume is projected to grow +9% YoY in 2026.<sup>1</sup>
- Most South Korean travellers require only an Electronic Travel Authorization (eTA) to enter Canada.
- The Korean won is expected to remain broadly stable against the CAD, supporting continued outbound travel momentum.
- Compared to 2025, direct air capacity in 2026 is forecast to increase +12% YOY, which translates to over 650,000 available seats. Compared to 2019 levels, air capacity is at 163%.<sup>2</sup>

### Canada spend and visitation levels (% increase relative to 2025)<sup>3</sup>

	2025*	2026	2027	2028	2029	2030
Spend	\$379M	+13%	+29%	+44%	+57%	+68%
Visitation	159K	+10%	+23%	+33%	+41%	+47%

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

Spend and visitation are both forecast to grow by 2030, with spend expected to outpace visitor growth. Compared to 2025 levels, visitation is projected to increase by 47%, from 159k to 233.5k visitors, while spend is expected to grow by 68%, from \$379M to \$637M.

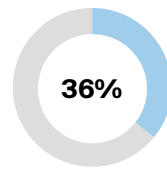
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### Canada's Opportunity

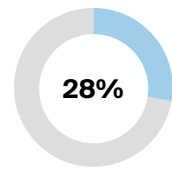


Canada's total opportunity in next 2 years (definitely/very likely to visit)<sup>4</sup>

### Organized group tour on Canada trip (past 3 years)<sup>4</sup>



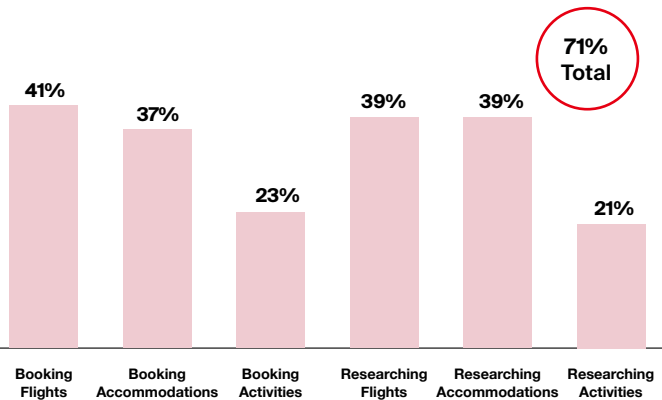
Yes, whole trip



Yes, portion of trip

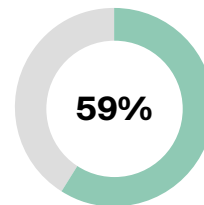
Organized group tours also play a role in this market, with travellers more likely to join a group tour for their full trip (36%) than for part of their trip (28%).

### Use travel agent/tour operator on Canada trip (past 3 years)<sup>2</sup>



This shows a clear reliance on travel agents and tour operators, with 71% of travellers using them for their Canada trip. Their role is important across both research and booking, particularly for flights and accommodations.

### Use AI tools to research, plan and book trips<sup>2</sup>



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<sup>1</sup> Oxford Economics Global Traveller Services, 2026

<sup>2</sup> OAG Traffic Analyzer, April 2026

<sup>3</sup> Destination Canada Tourism Outlook, 2026

<sup>4</sup> Global Traveller Research Program, 2024

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↑/↓ significant increase/decrease vs. previous year



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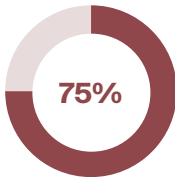
### Refined Globetrotters segment size<sup>4</sup>



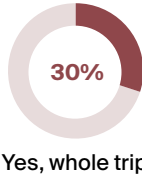
### Canada's Refined Globetrotters opportunity in next 2 years (definitely/very likely to visit)<sup>4</sup>



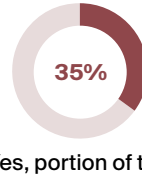
### Use travel agent/tour operator on Canada trip (past 3 years)<sup>4</sup>



### Organized group tour on Canada trip (past 3 years)<sup>4</sup>

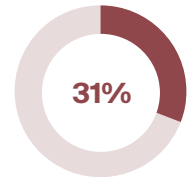


Yes, whole trip



Yes, portion of trip

### Use AI tools to research, plan and book trips<sup>4</sup>



## OUTDOOR EXPLORERS

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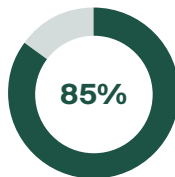
### Outdoor Explorers segment size<sup>4</sup>



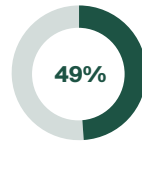
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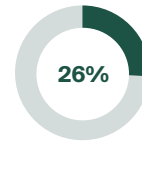
### Use travel agent/tour operator on Canada trip (past 3 years)<sup>4</sup>



### Organized group tour on Canada trip (past 3 years)<sup>4</sup>

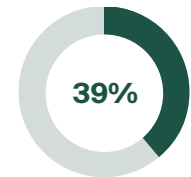


Yes, whole trip



Yes, portion of trip

### Use AI tools to research, plan and book trips<sup>4</sup>



<sup>4</sup>Global Traveller Research Program, 2024

↑/↓ significant increase/decrease vs. previous year

**For further information, please contact:**

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- Leisure outbound travel volume is projected to grow +13% YoY in 2026.<sup>1</sup>
- Most Japanese travellers require only an Electronic Travel Authorization (eTA) to enter Canada.
- The Japanese yen is expected to remain weak against the CAD, continuing to constrain long-haul travel spending.
- While value for money is the strongest overall driver of destination choice for Japanese travellers, in the context of Canada, it is secondary to perceived values (such as openness to new ideas), distinctive nature and cultural experiences, relaxation opportunities and being easy to get to.<sup>2</sup>
- Compared to 2025, direct air capacity in 2026 is forecast to increase +2% YOY, which translates to just under 1 million available seats. Compared to 2019 levels, air capacity is at 161%.<sup>3</sup>

## Canada spend and visitation levels (% increase relative to 2025)<sup>4</sup>

	2025*	2026	2027	2028	2029	2030
Spend	\$401M	+14%	+34%	+53%	+67%	+80%
Visitation	155K	+3%	+19%	+33%	+41%	+46%

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

Spend and visitation are both forecast to grow by 2030, with spend expected to outpace visitor growth. Compared to 2025 levels, visitation is projected to increase by 46%, from 155k to 227k visitors, while spend is expected to grow by 80%, from \$401M to \$721M.

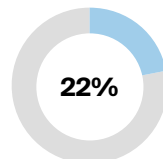
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### Canada's Opportunity

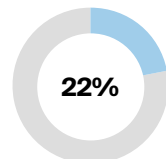


Canada's total opportunity in next 2 years (definitely/very likely to visit)<sup>2</sup>

### Organized group tour on Canada trip (past 3 years)<sup>2</sup>



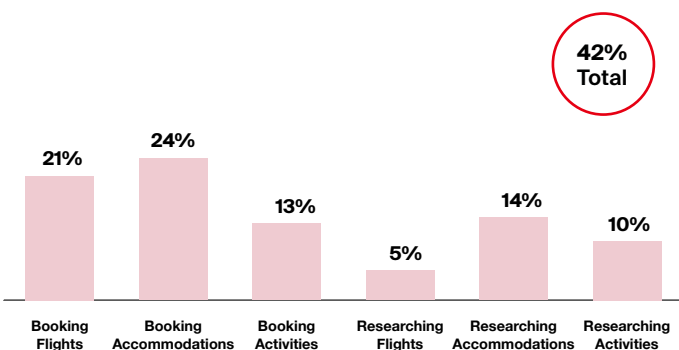
Yes, whole trip



Yes, portion of trip

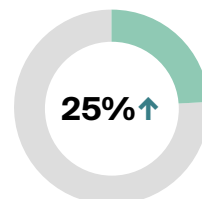
Organized group tours show balanced demand in this market, with travellers equally likely to join a group tour for their full trip (22%) as for part of their trip (22%).

### Use travel agent/tour operator on Canada trip (past 3 years)<sup>2</sup>



This shows moderate reliance on travel agents and tour operators, with 42% of travellers using them for their Canada trip. Their role is strongest at the booking stage.

### Use AI tools to research, plan and book trips<sup>2</sup>



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<sup>1</sup> Oxford Economics Global Traveller Services, 2026

<sup>2</sup> Global Traveller Research Program, 2025

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<sup>4</sup> Destination Canada Tourism Outlook, 2026

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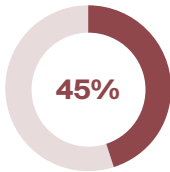
### Refined Globetrotters segment size<sup>2</sup>



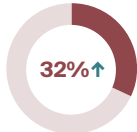
### Canada's Refined Globetrotters opportunity in next 2 years (definitely/very likely to visit)<sup>2</sup>



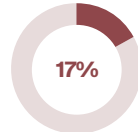
### Use travel agent/tour operator on recent long-haul trip (past 3 years)<sup>2</sup>



### Organized group tour on recent long-haul trip (past 3 years)<sup>2</sup>

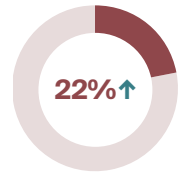


Yes, whole trip



Yes, portion of trip

### Use AI tools to research, plan and book trips<sup>2</sup>



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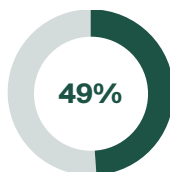
### Outdoor Explorers segment size<sup>2</sup>



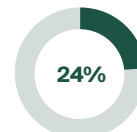
### Canada's Outdoor Explorers opportunity in next 2 years (definitely/very likely to visit)<sup>2</sup>



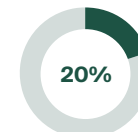
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### Organized group tour on recent long-haul trip (past 3 years)<sup>2</sup>

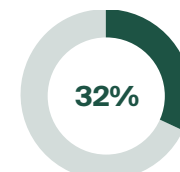


Yes, whole trip



Yes, portion of trip

### Use AI tools to research, plan and book trips<sup>2</sup>



<sup>2</sup> Global Traveller Research Program, 2025

↑/↓ significant increase/decrease vs. previous year

### For further information, please contact:

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