

2023 GLOBAL TRAVELLER RESEARCH PROGRAM

GERMANY HIGHLIGHTS REPORT



Canada



St. John's

Newfoundland & Labrador



CONTENTS

03 Study Overview:
Germany Market

04 Key Insights

05 Market Sizing

12 Considering
Canada as a Travel
Destination

15 Travel Behaviours

20 Indigenous
Tourism Activities

22 Trip to Canada in
the Past 3 Years

STUDY OVERVIEW: GERMANY MARKET

Target Population

The target population are residents who are aged 18 years or more, who have taken a long-haul pleasure holiday and stayed at least four nights in a paid accommodation in the last three years or are thinking about doing so in the next two years.

Timing of fieldwork

December 12th-18th 2023

Geographical Definition for Qualified Trips

Qualified trips refer to trips taken outside of Europe, North Africa and the Mediterranean

To note:

In 2023, DC switched research providers to YouGov Canada, with the research program evolving from the previous Global Travel Watch (GTW) to the new Global Traveller Research Program (GTRP). The project has also been migrated over to YouGov's proprietary panel. As a result, no trending is available for the German market.

Key Insights



Canada ranks 3rd in terms of unaided consideration among German travellers, with next 2-year immediate potential for Canada being 6.3M



Potential visitors to Canada are more likely to consider a visit during the Summer, Fall, and Spring months



Travellers are interested in outdoor experiences, such as oceanside beaches, nature walks, and attractions



Travellers to Canada in the past 3 years were mostly on vacation with a significant other, followed by children and friends



There is a high level of interest in Indigenous culture, with potential visitors to Canada showing interest in Indigenous food and drink, nature adventures, and visiting an Indigenous community

MARKET SIZING



Kyle
Saskatchewan



LONG-HAUL PLEASURE TRAVELLER SIZING



Total population aged 18 years or more¹

69,700,000

X

Incidence rate: Long-haul pleasure travellers who have taken a trip in the past 3 years or plan to in the next 2 years²

32.6%

=



Size of the Long-haul Pleasure Traveller Target market

22,722,000

This study was conducted among long-haul pleasure travellers, represented by 22.7M Germans aged 18 years or more.



Essipit
Québec

Base: General population aged 18+ (n=2122)
¹Source: 2023 estimates, Federal Statistical Office of Germany
²Note: Results are from 2023 YouGov Canada Omnibus Survey

SIZE OF THE POTENTIAL MARKET TO CANADA (NEXT 2 YEARS)



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

22,722,000

X

Target Market for Canada

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

65.4%

=



Size of the target market

14,860,000

X

Immediate Potential for Canada

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

42.1%

=



Immediate potential

6,256,000

Base: Target market for Canada = long-haul pleasure travellers (past 3 years or next 2 years) (n=1518); Immediate potential for Canada = dream to purchase stages for P2P for Canada (n=992)

7 Which of the following best describes your current situation when thinking about each of the following destinations for a holiday trip? (Select one for each) Realistically, how likely are you to take a holiday trip to Canada in the **next 2 years**? (Select one)

¹Includes respondents likely to visit Canada for a trip of 1 to 3 nights, or a trip of 4 nights or more

The next 2-year immediate potential for Canada is 6.3 million long-haul pleasure travellers.



Grand Manan Island
New Brunswick

Germany GTRP –
December 2023

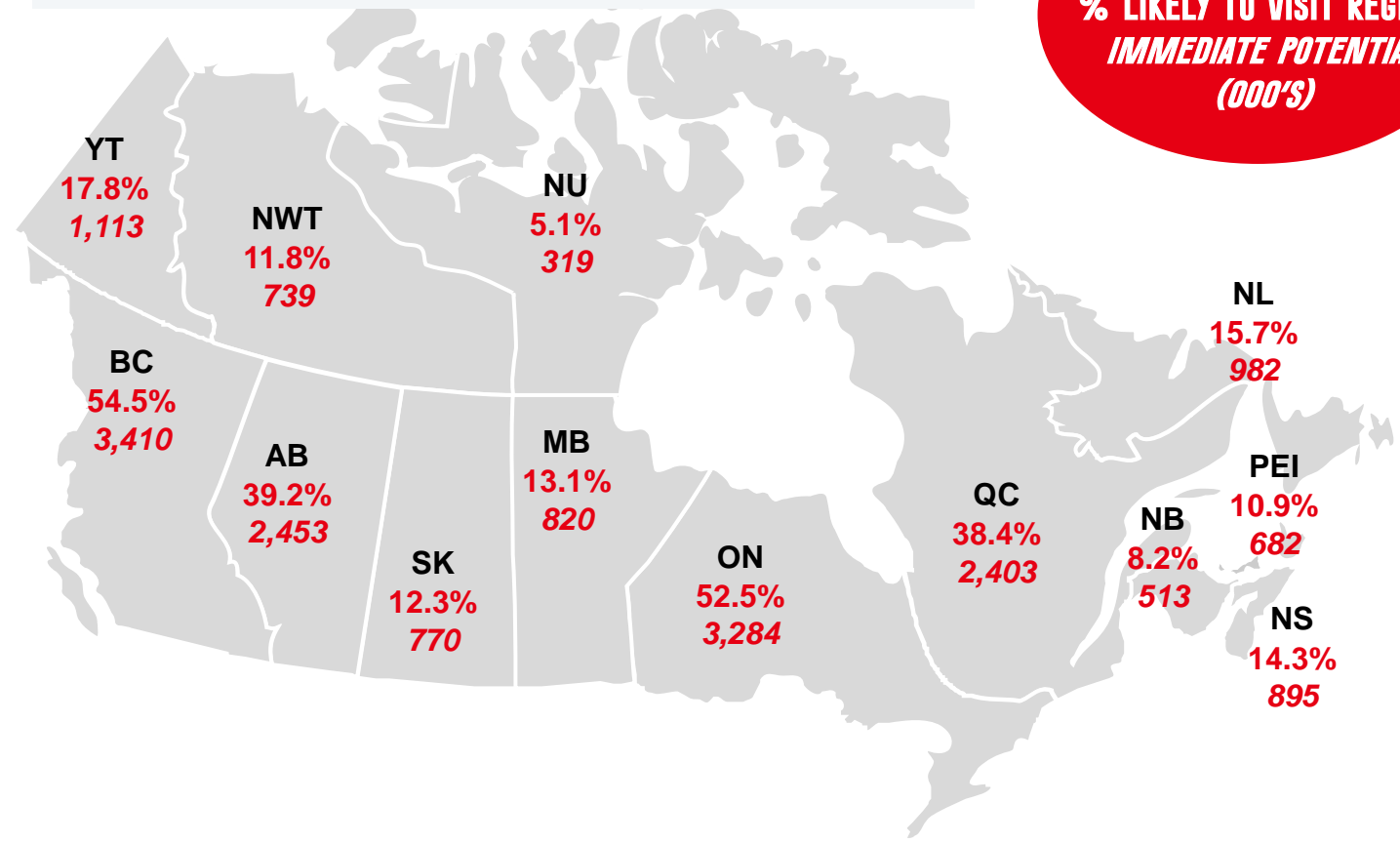


POTENTIAL MARKET SIZE FOR THE REGIONS

British Columbia and Ontario each have the potential to draw in over 3 million German travellers in the next 2 years.

IMMEDIATE POTENTIAL FOR CANADA: 6,256,000

KEY
% LIKELY TO VISIT REGION
IMMEDIATE POTENTIAL
(000'S)



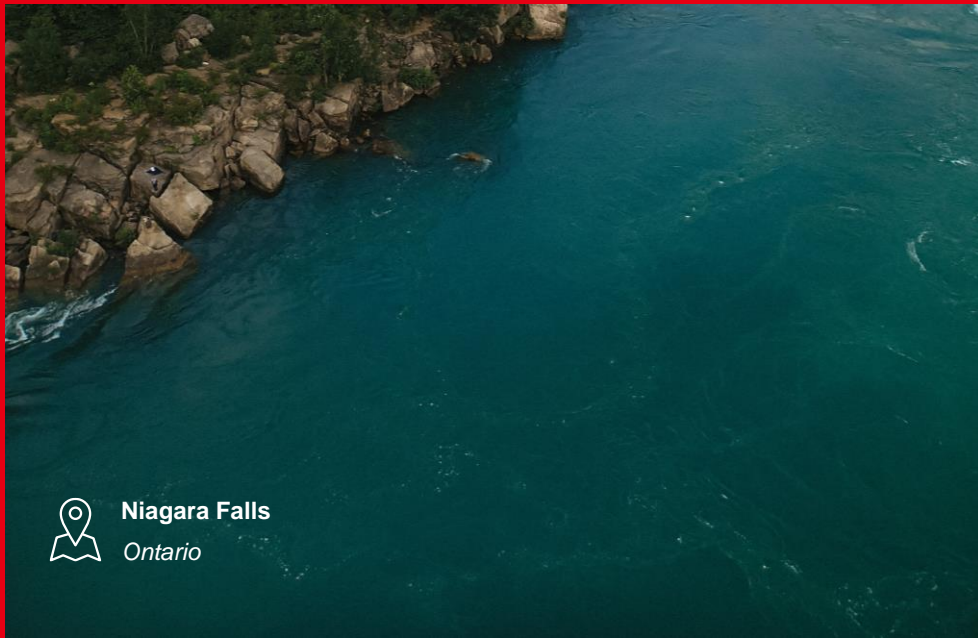
Base: Those in the dream to purchase stages of the path to purchase for Canada and definitely/very likely to take a trip to Canada (n=992)
If you were to take a holiday trip to Canada, in the next 2 years, which of the following Canadian provinces or territories are you likely to visit? (Select all that apply)



TRAVEL DESTINATIONS LIKELY TO VISIT (NEXT 2 YEARS)



Popular travel destinations include Vancouver, Niagara Falls, Toronto, and the Rocky Mountains.



Niagara Falls
Ontario

British Columbia	
Vancouver	39%
Rocky Mountains	34%
Victoria	19%
Whistler	9%
Okanagan	7%
Other – BC	6%

Ontario	
Niagara Falls	38%
Toronto	36%
Ottawa	25%
Muskoka	5%
Other – ON	4%

Alberta	
Rocky Mountains	26%
Calgary	17%
Banff	11%
Edmonton	11%
Jasper	9%
Other – AB	3%

Québec	
Montréal	29%
Québec City	21%
Mont Tremblant	9%
Other – QC	6%

Base: Those in the dream to purchase stages of the path to purchase for Canada & definitely/likely to take a trip to Canada (n=992)
Within [PROVINCE], which travel destinations are you likely to visit? (Select all that apply)

TRAVEL DESTINATIONS LIKELY TO VISIT (NEXT 2 YEARS) (CONTINUED)

Saskatchewan	
Saskatoon	7%
Regina	6%
Other – SK	3%

Manitoba	
Winnipeg	7%
Churchill	6%
Other – MB	2%

New Brunswick	
Saint John	5%
Fredericton	4%
Other – NB	2%

Nova Scotia	
Halifax	10%
Cape Breton	6%
Other – NS	3%

Prince Edward Island	
Charlottetown	7%
Other – PEI	6%

Newfoundland & Labrador	
St. John's	9%
Other – NL	8%

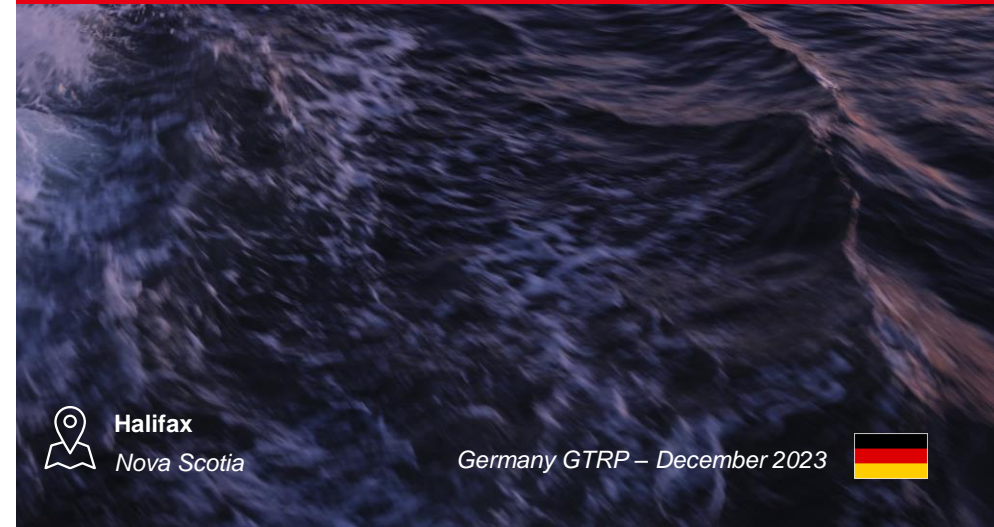
Yukon	
Dawson City	10%
Whitehorse	10%
Other – YT	5%

Northwest Territories	
Yellowknife	8%
Inuvik	5%
Other – NWT	3%

Nunavut	
Iqaluit	4%
Other – NU	2%



Potential travellers to Canada express some interest in visiting destinations in the Yukon and Nova Scotia.



10 Base: Those in the dream to purchase stages of the path to purchase for Canada & definitely/likely to take a trip to Canada (n=992) Within [PROVINCE], which travel destinations are you likely to visit? (Select all that apply)

TIME OF YEAR INTERESTED IN TAKING A TRIP TO CANADA (NEXT 2 YEARS)

Province/Territory	Winter (Dec, Jan, Feb)	Spring (Mar, Apr, May)	Summer (Jun, Jul, Aug)	Fall (Sept, Oct, Nov)
British Columbia	5%	14%	27%	21%
Alberta	5%	12%	20%	16%
Saskatchewan	2%	5%	7%	4%
Manitoba	2%	5%	7%	5%
Ontario	4%	16%	26%	20%
Québec	4%	11%	19%	15%
New Brunswick	1%	3%	5%	4%
Nova Scotia	2%	3%	7%	7%
Prince Edward Island	2%	4%	6%	4%
Newfoundland & Labrador	2%	5%	8%	6%
Yukon	2%	6%	9%	6%
Northwest Territories	1%	4%	7%	5%
Nunavut	1%	2%	3%	2%



German travellers are most likely to visit Canada during the summer, fall, and spring months.



Falcon Trails Resort
Manitoba

Germany GTRP – December 2023



11 Base: Those in the dream to purchase stages of the path to purchase for Canada & definitely/likely to take a trip to Canada (n=992)
During what time of year are you considering visiting [PROVINCE]? (Select all that apply)



Peggy's Cove
Nova Scotia



CANADIAN TOURISM DATA
collective



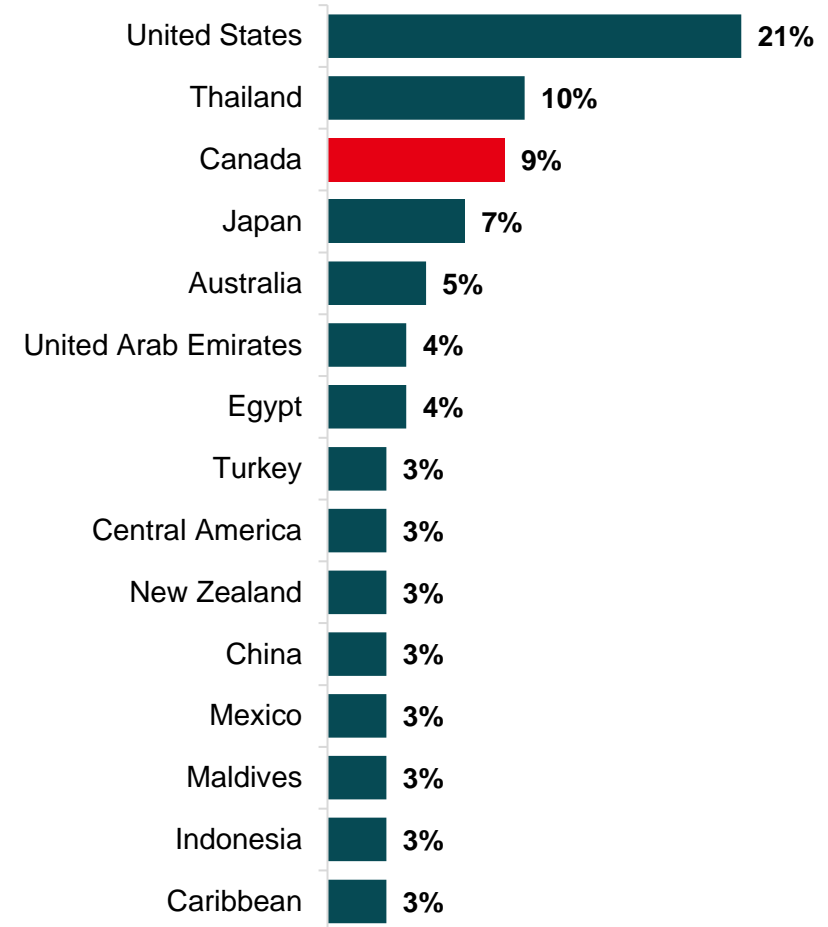
DESTINATION
CANADA

CONSIDERING CANADA AS A TRAVEL DESTINATION

Germany GTRP – December 2023



UNAIDED DESTINATION CONSIDERATION (NEXT 2 YEARS)¹

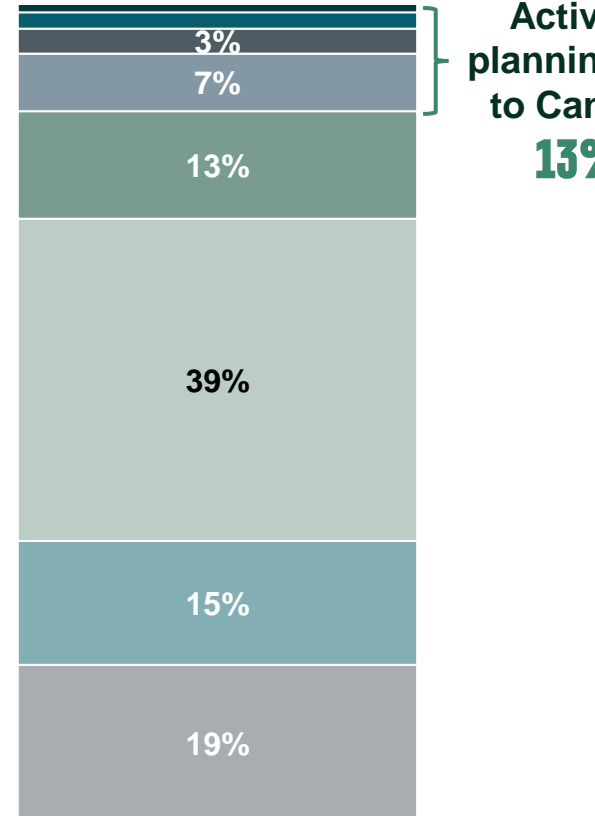


Canada ranks third for unaided destination consideration, behind the United States and Thailand.

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1518)
 You mentioned that you are likely to take a long-haul holiday trip in the next 2 years. Which destinations are you seriously considering? (Please list up to 3 destinations)
¹Note: Roll-up of brand mentions by country (e.g., percentage who said "Canada" or any destination in Canada).

STAGE IN THE PURCHASE CYCLE FOR CANADA

- Have already booked my transportation and accommodations
- Am currently making transportation and accommodation arrangements
- Am planning the itinerary for a trip to this country
- Have started to gather some travel information for a trip to this country
- Seriously considering visiting / returning in the next 2 years
- Dreaming about visiting / returning someday
- Not interested in visiting / returning in the foreseeable future
- Have never thought of taking a trip to this destination



Over one in ten German travellers are actively planning a trip to Canada.



Lake Louise
Alberta

Germany GTRP – December 2023



TRAVEL BEHAVIOURS



Whitehorse
Yukon



TOP 10 GENERAL ACTIVITIES INTERESTED IN

69%

Oceanside Beaches

63%

Nature Walks

60%

Natural Attractions

56%

Trying Local Food and Drink

53%

Local Markets

47%

Hiking

46%

Nature Parks

43%

Viewing Wildlife or Marine Life

42%

Fine Dining

41%

Travelling to Remote Destinations



German travellers are particularly interested in outdoor experiences, such as oceanside beaches, nature walks, and natural attractions.

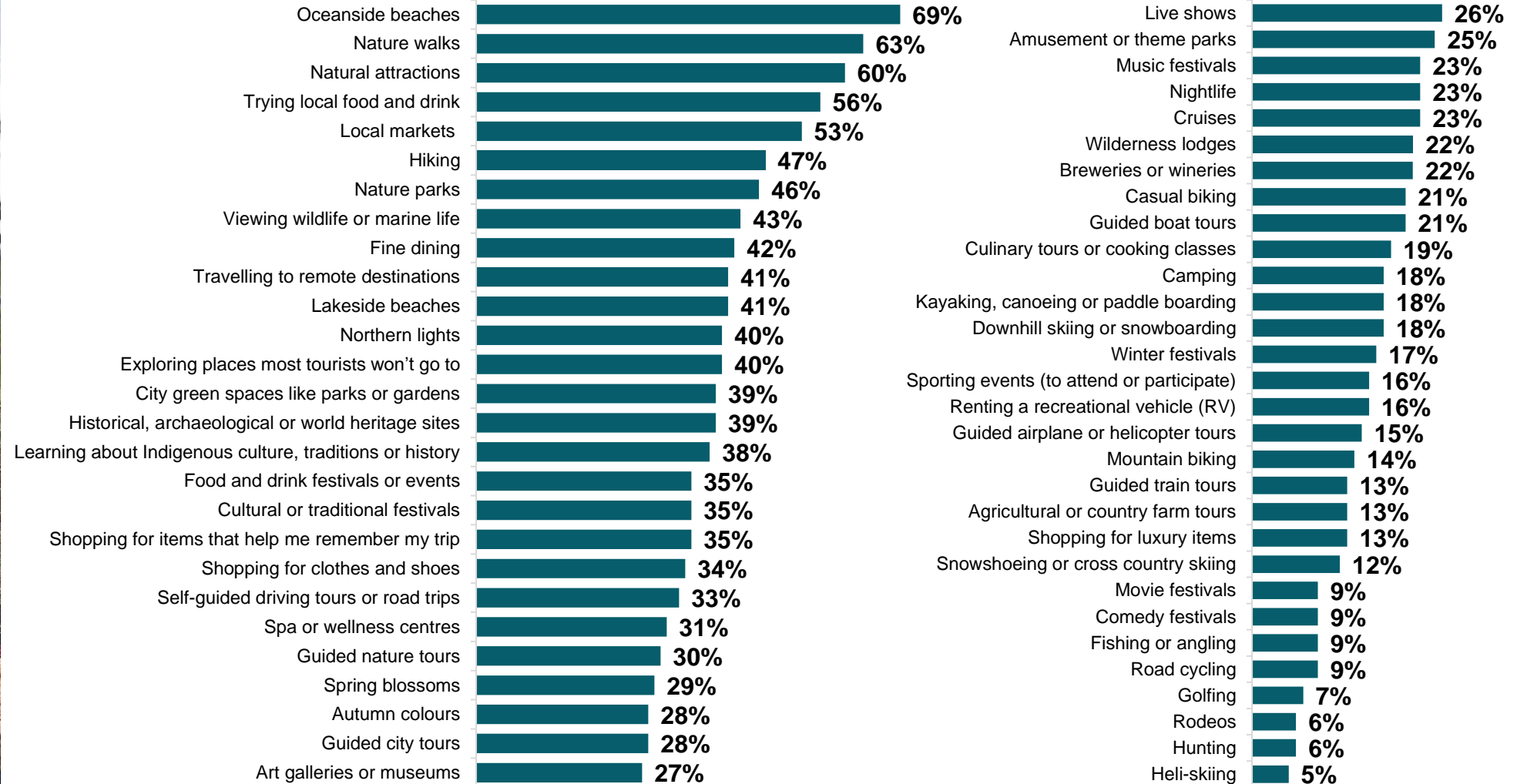


Winnipeg
Manitoba

Germany GTRP –
December 2023



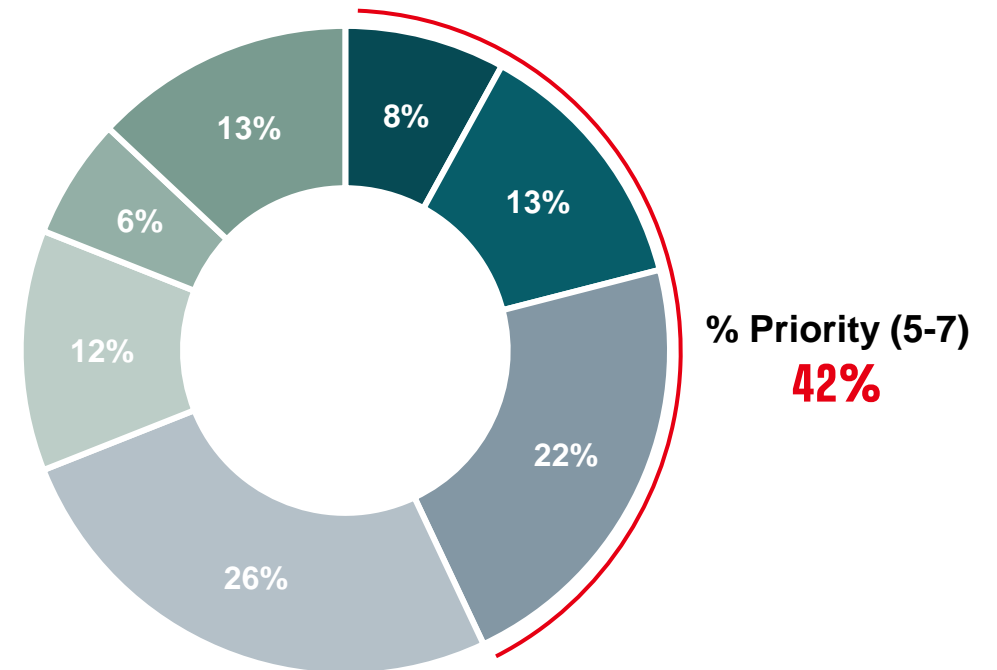
GENERAL ACTIVITIES INTERESTED IN (FULL LIST)



Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1518)
In general, what activities or places are you interested in while on holiday? (Select all that apply)



PRIORITY OF SUSTAINABLE TRAVEL WHEN PLANNING A TRIP



■ 7 - Essential priority ■ 6 ■ 5 ■ 4 ■ 3 ■ 2 ■ 1 - Not a priority

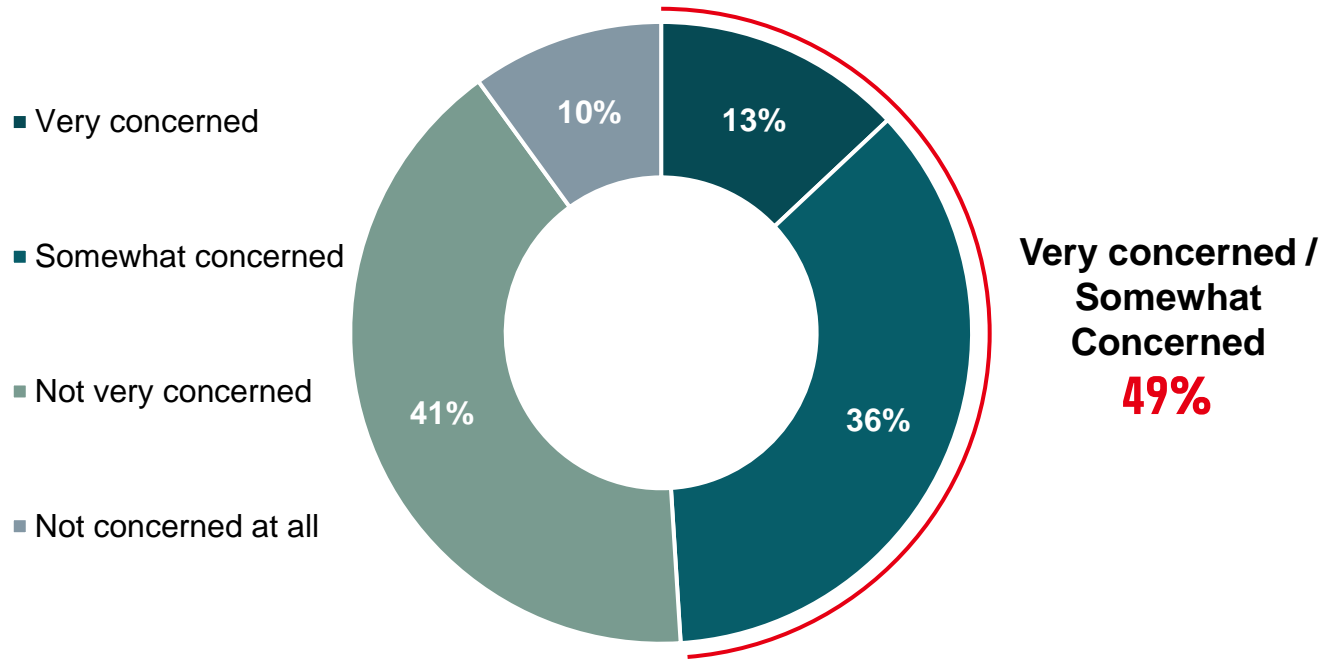
Over four in ten German travellers consider sustainability a travel priority.



Nahanni
Northwest Territories

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1518)
How much of a priority is sustainable travel to you when you are planning a trip? Please use a 7-point scale, where 7 means 'essential priority' and 1 means 'not a priority'.
Sustainable travel refers to "travel that minimizes any negative impacts on the destination's environment, economy and society, while making positive contributions to the local people and conserving the destination's natural and cultural heritage".

IMPACT OF EXTREME WEATHER EVENTS ON TRAVEL PLANS

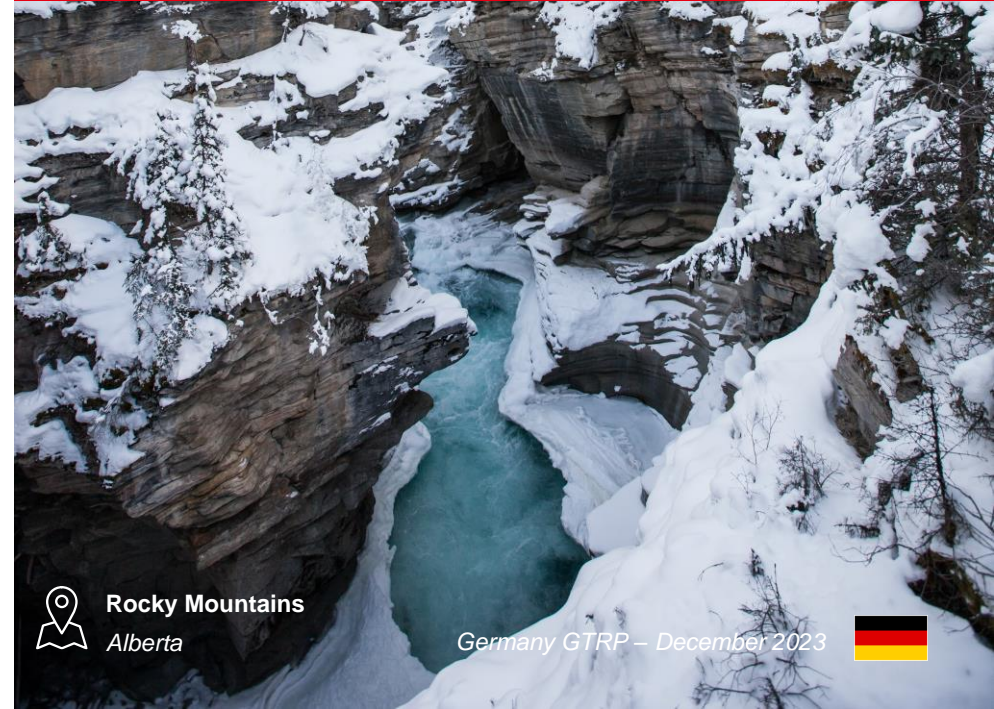


16% Changed/Cancelled plans in the past 3 years due to extreme weather events

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=791)
 How concerned are you about extreme weather events affecting your travel plans?
 In the past 3 years, have you ever had to change plans or cancel a trip due to extreme weather events?
 Extreme weather events description: As you may or may not be aware, extreme weather events are occurrences of unusually severe weather or climate conditions. They are often short-lived and include blizzards, heat waves, wildfires, tornadoes, hurricanes or tropical cyclones.



Half of German travellers are concerned about extreme weather impacting their travel plans.



INDIGENOUS TOURISM ACTIVITIES



British Columbia

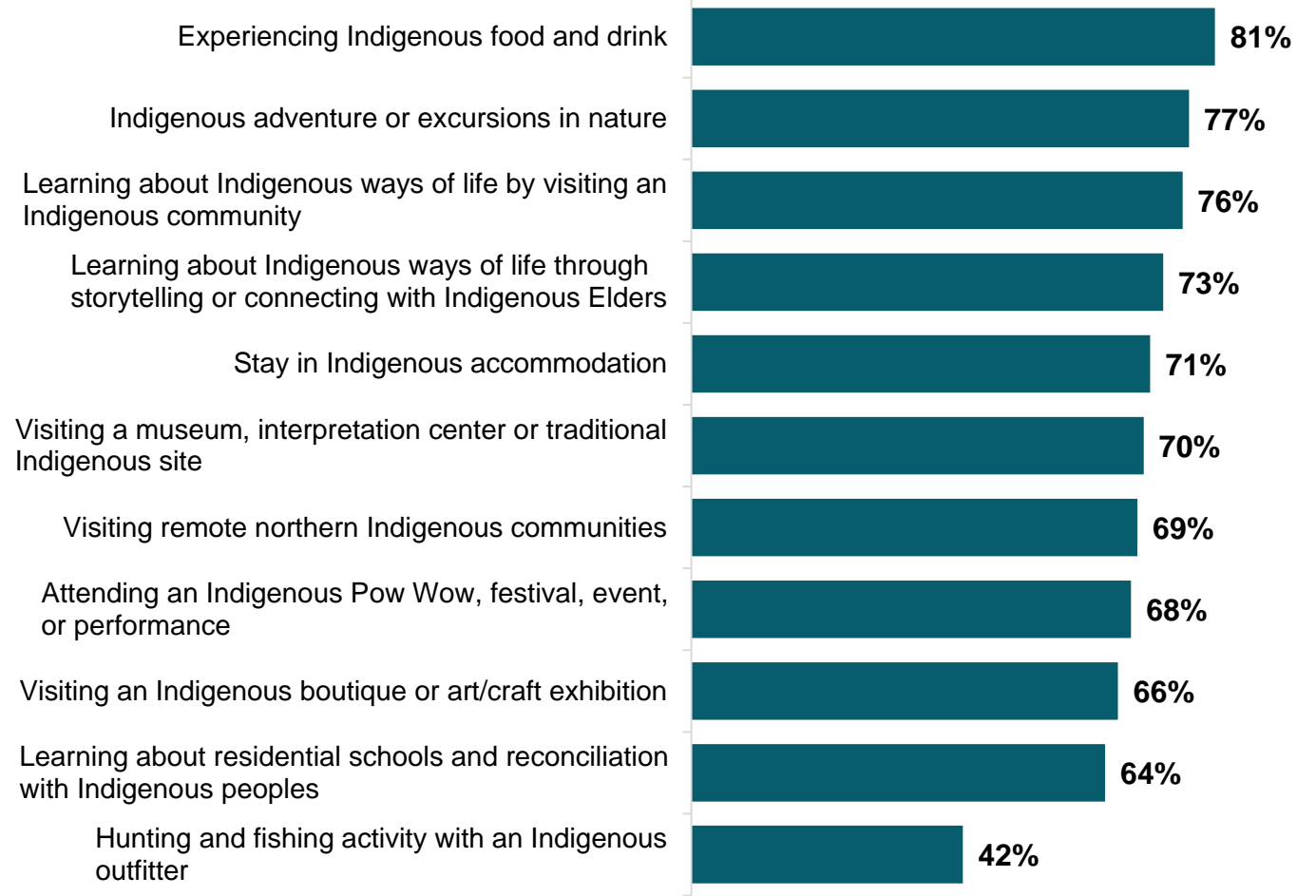


INTEREST IN INDIGENOUS CULTURAL & TOURISM ACTIVITIES

For Indigenous activities, potential visitors to Canada are most interested in sampling Indigenous food, engaging in Indigenous nature adventures, and visiting an Indigenous community.



% Somewhat/Very Interested



Base: Those in the dream to purchase stages of the path to purchase for Canada (n=992)
What is your level of interest in the following Indigenous cultural experiences and tourism activities in Canada? Indigenous Tourism Description: As you may or may not know, in Canada, Indigenous tourism businesses are majority-owned or operated by Indigenous peoples (First Nations, Métis or Inuit). The social and economic benefits of Indigenous tourism businesses goes back to the business owners and/or the communities where they are based.

TRIP TO CANADA IN THE PAST 3 YEARS



Jasper
Alberta



TOP 10 ACTIVITIES PARTICIPATED IN DURING PAST 3 YEAR TRIP TO CANADA

Travellers to Canada in the past 3 years participated in outdoor activities, such as going on nature walks, hiking, and seeing natural attractions.

45%

Nature Walks

31%

Trying Local Food and Drink

42%

Hiking

31%

Oceanside Beaches

37%

Natural Attractions

29%

Fine Dining

34%

Nature Parks

29%

City Green Spaces

31%

Local Markets

28%

Shopping for Items that Help Me Remember My Trip

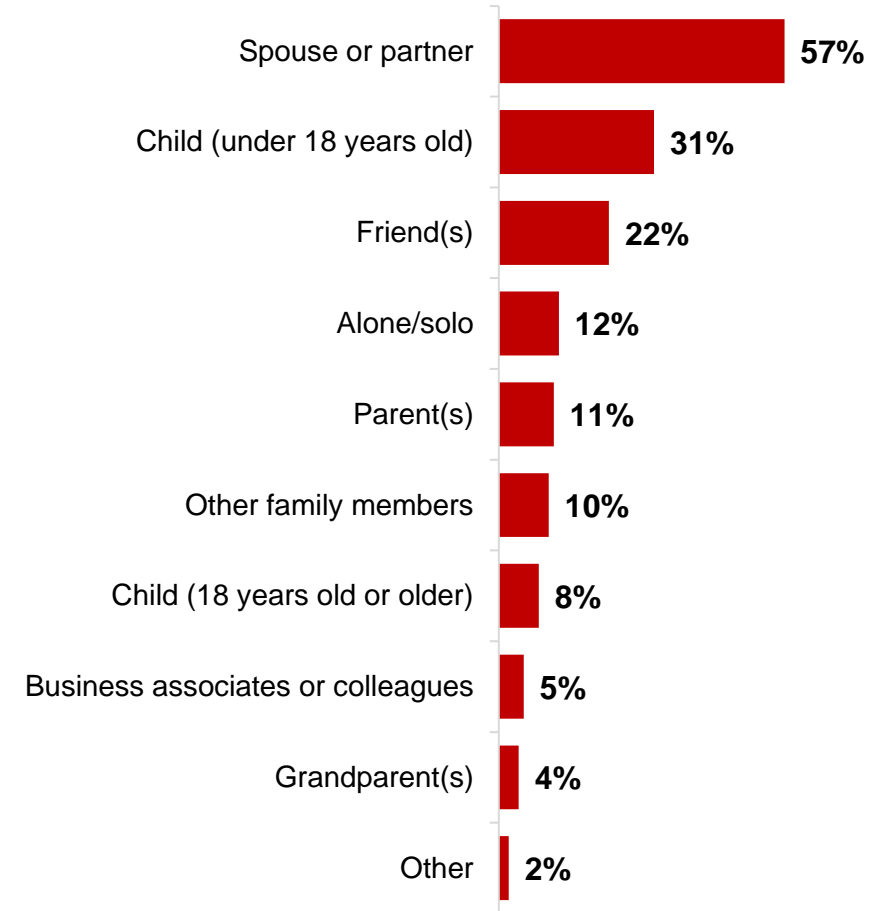
Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travellers to Canada (n=153)
Which of the following activities, if any, did you participate in during your recent trip to Canada? (Select all that apply)



Johnston Canyon
Alberta

TRAVEL PARTY OF PAST 3 YEAR TRIP TO CANADA

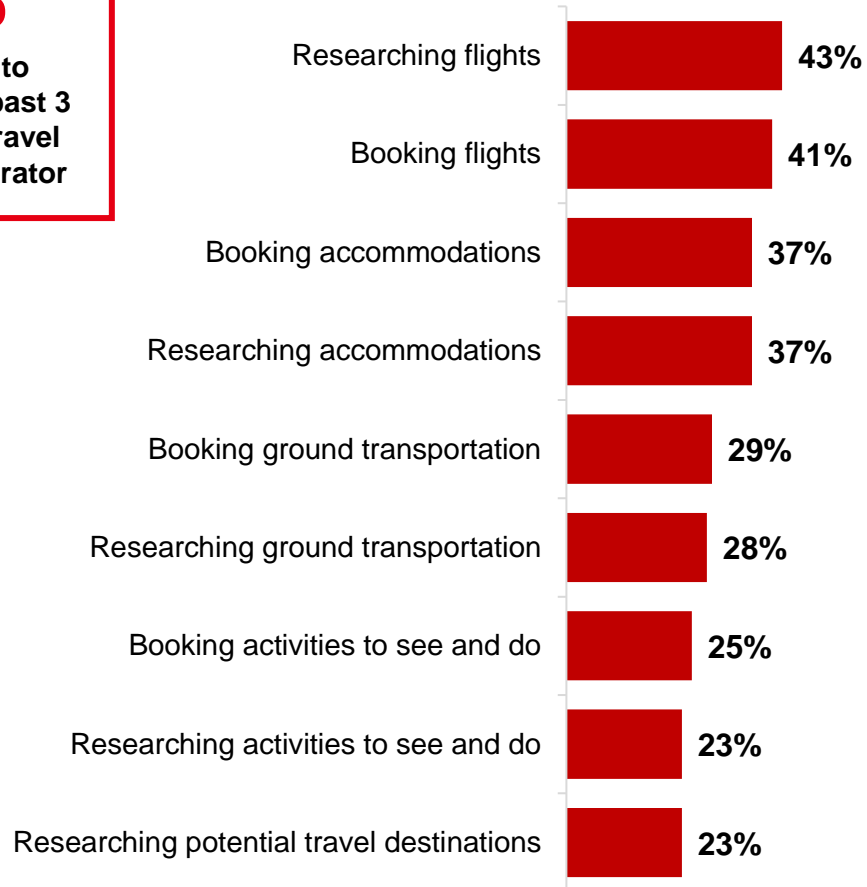
Most travellers to Canada in the past 3 years came with a spouse or partner. The next most common travel companions were children under 18 and friends.



Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travellers to Canada (n=153)
With whom did you travel on this trip? (Select all that apply)

TRAVEL AGENTS/TOUR OPERATOR USAGE FOR PAST 3 YEAR TRIP TO CANADA

45%
of travellers to Canada in the past 3 years used a travel agent/ tour operator



Less than half of travellers to Canada in the past 3 years used a travel agent or tour operator. These agents or operators primarily helped with researching and booking flights and accommodations.

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travellers to Canada, Used a Travel Agent/Tour Operator (n=69)
Travel agents offer personalized service to help individuals, groups, and business travellers plan and organize their travel schedules, from purchasing tour packages to booking flights and hotels. Examples of travel agents include Tui Reisecenter or Dertour, they do not include online booking engines like Expedia or Opodo. Did you use a travel agent or tour operator to help you research or book your trip? (Select one)
Which of the following did a travel agent or tour operator help you with?



ORGANIZED GROUP TOUR USAGE FOR PAST 3 YEAR TRIP TO CANADA

Over one-third of travellers to Canada in the past 3 years participated in an organized group tour for their entire trip.

Yes, my whole trip was part of an organized group tour

37%

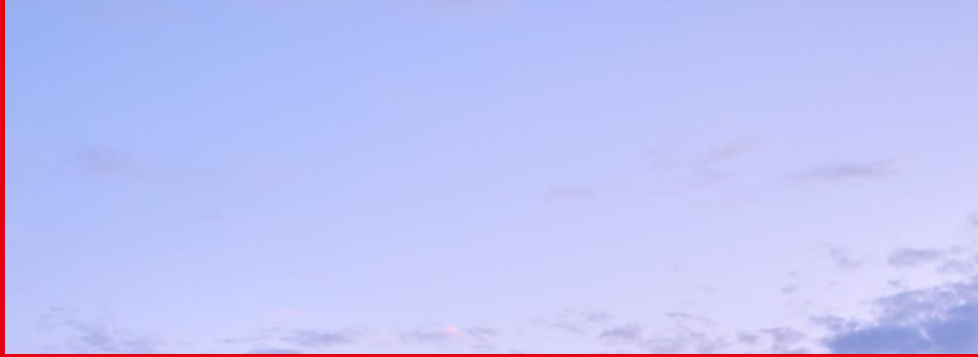
Yes, a portion of my trip was part of an organized group tour

15%

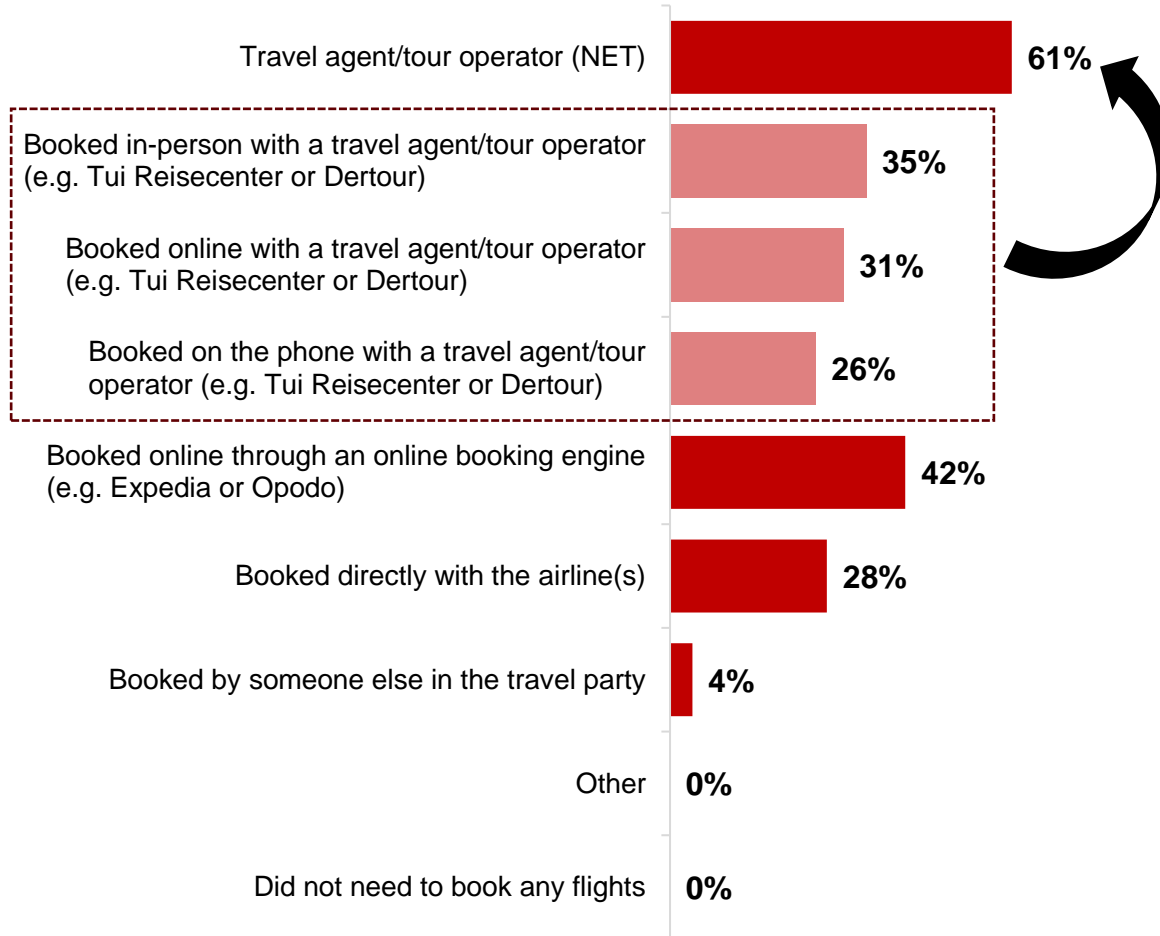
No

48%

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travellers to Canada (n=153)
An organized group tour consists of a package where any combination of accommodation, transportation, food and/or activities are included as a multi-day itinerary. Did you travel as a part of an organized group tour on this trip?



BOOKING FLIGHTS FOR PAST 3 YEAR TRIP TO CANADA

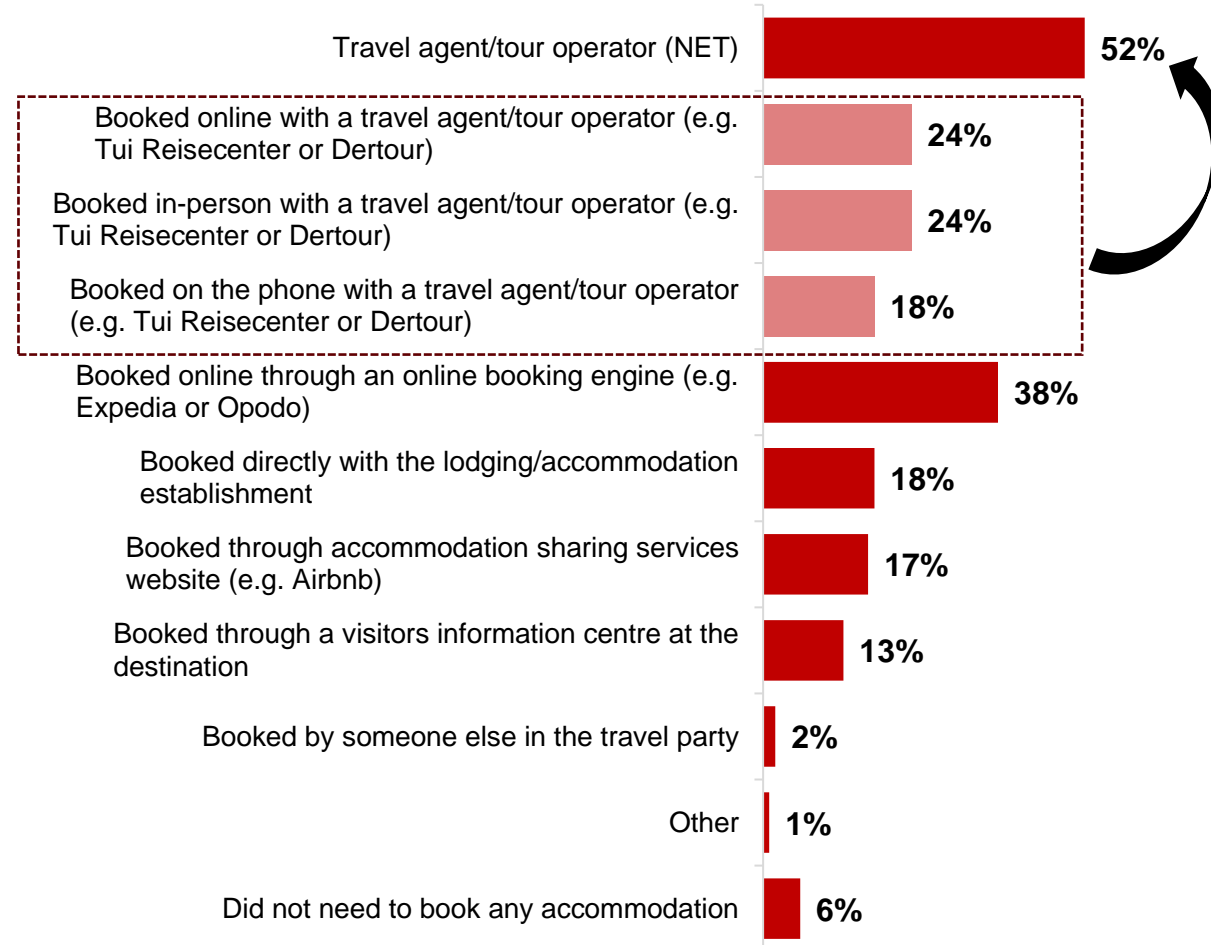


Six in ten travellers to Canada in the past 3 years used a travel agent/ tour operator to book their flights.



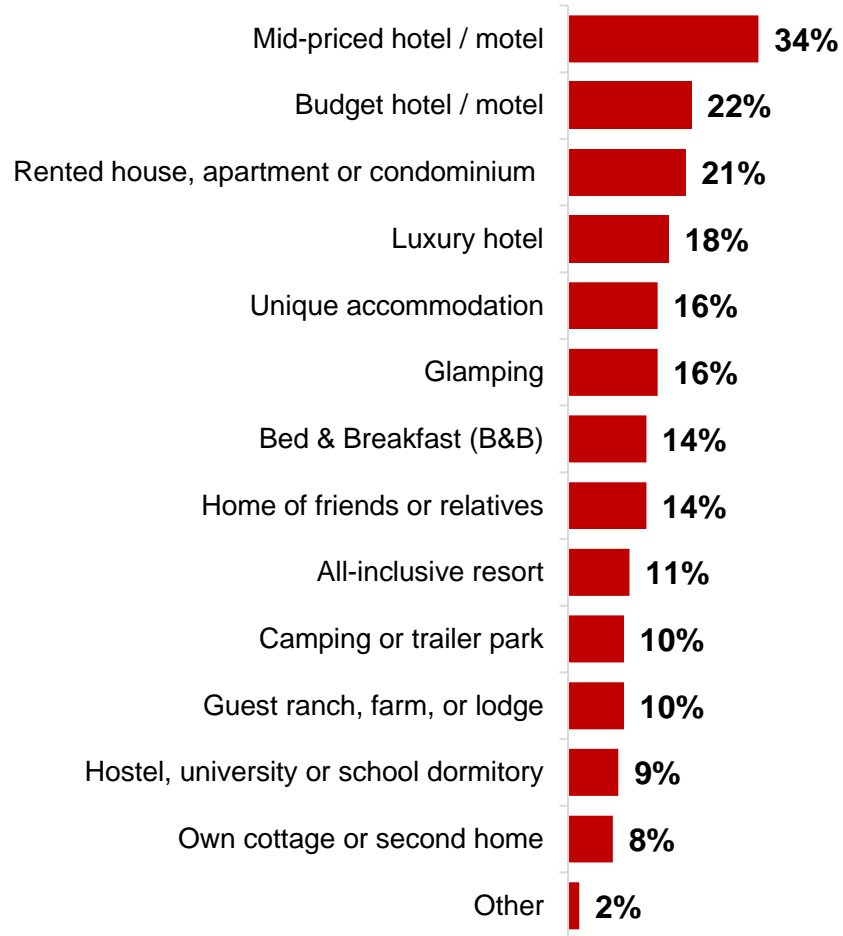
BOOKING ACCOMMODATIONS FOR PAST 3 YEAR TRIP TO CANADA

Over half of travellers to Canada in the past 3 years used a travel agent/ tour operator to book their accommodations.



Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travellers to Canada (n=153)
How did you book your accommodation for this trip? (Select all that apply)

TYPES OF ACCOMMODATION DURING PAST 3 YEAR TRIP TO CANADA



29 Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travellers to Canada (n=143)

Which type of accommodation did you stay in during this trip? (Select all that apply)



Travellers to Canada in the past 3 years were most likely to stay in economical accommodations, such as mid-priced and budget hotels.



THANK YOU

For any questions, please reach out to research@destinationcanada.com



CANADIAN TOURISM DATA
collective