

# 2024 GLOBAL TRAVELLER RESEARCH PROGRAM

## GERMANY HIGHLIGHTS REPORT



Canada



Sunshine Coast British Columbia





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# STUDY OVERVIEW: GERMANY MARKET



The Global Traveller Research Program is an annual survey commissioned by Destination Canada and conducted by YouGov Canada. The study fielded online in German, with sample being sourced from a nationally established panel.

The target population are residents aged 18 years and older who have taken a long-haul pleasure trip, where they had stayed at least 4 nights with a minimum of 1 night in paid accommodations in the past 3 years, or plan to take such a trip in the next 2 years.

Highly Engaged Guest (HEG) Audience Definition: Four segments that have been identified by Destination Canada as having higher economic and responsible values that most benefit Canadian communities.

		
Timing of Fieldwork	Geographical Definition for Qualified Trips	Sample Distribution
November 19 <sup>th</sup> – December 6 <sup>th</sup> 2024	Outside of: Europe, North Africa and the Mediterranean	Sample distribution: National
		Highly Engaged Guest (HEG) Audience: 1107
		Other travellers: 428
		Total sample size: 1535

- In 2023, DC switched research providers to YouGov Canada, with the project being migrated over to YouGov’s proprietary panel.



# Key Insights



**Canada continues to be a leading international destination among German travellers, with next 2-year immediate potential for Canada being 5.7M**



**Potential visitors to Canada are more likely to consider a visit during the Summer months, followed by Fall**



**German travellers are interested in oceanside beaches, nature walks, and natural attractions**



**Travellers to Canada in the past 3 years were mostly on holiday trips, choosing Canada for factors including that it was somewhere they always wanted to visit, seeing a great trip itinerary, and safety**



**There is a high level of interest in Indigenous culture among German Travellers: safety and comfort of the destination, as well as culturally significant experiences would increase their interest in Indigenous cultural experiences**



# MARKET SIZING



Killarney Provincial Park  
Ontario

# MARKET SIZING – LONG-HAUL TRAVELLERS

Total Population 18+

69,700,000 (Total DE Population 18+)

26% Took a Long-Haul<sup>^</sup> Pleasure Trip in the Past 3 Years

18,122,000 (Recent Long-Haul Travellers)

25% Plan To Take a Long-Haul Pleasure Trip In Next 2 Years

17,425,000 (Upcoming Long-Haul Travellers)

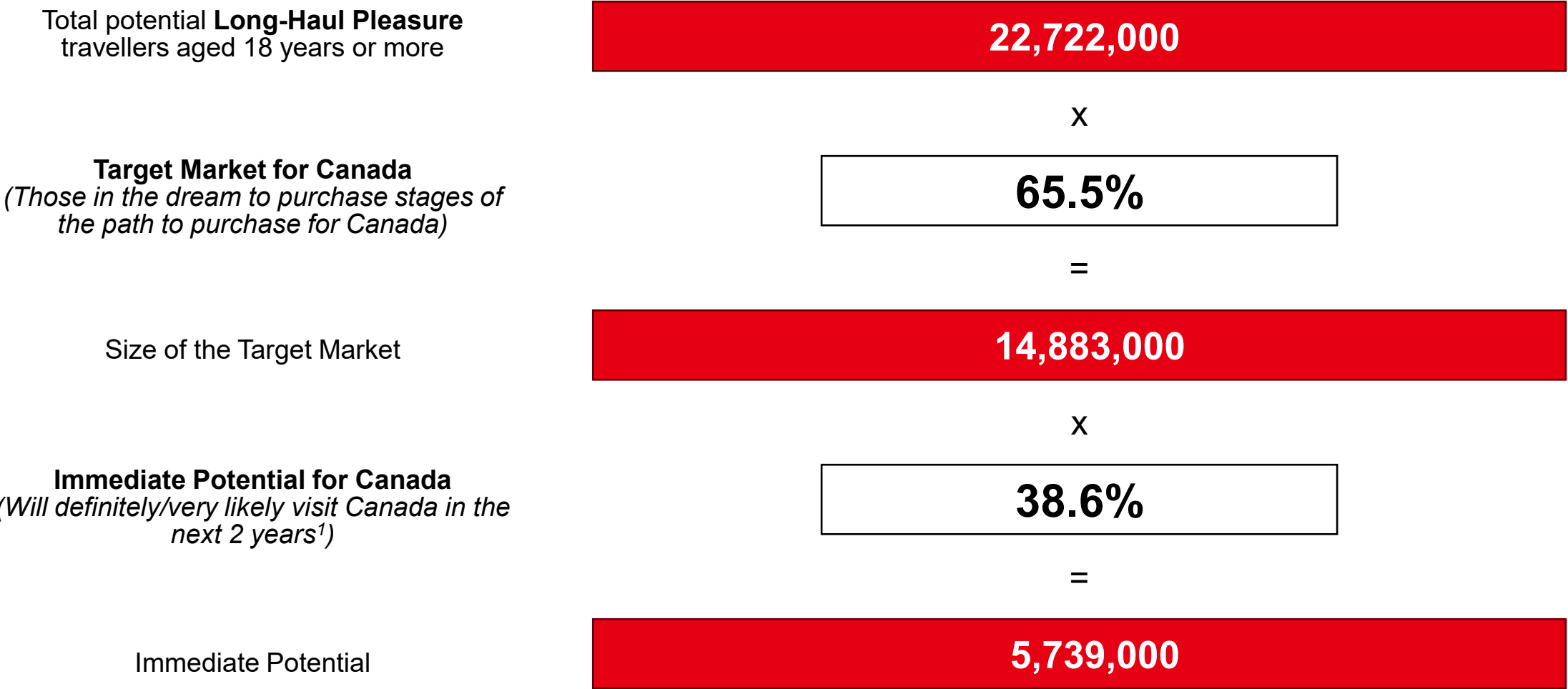
32.6% Incidence Rate

Total long-haul pleasure travel incidence (past 3 years/planned next 2 years)

22,722,000 (Total Long-haul Travellers)

<sup>^</sup> Long-haul = outside of Europe, North Africa and the Mediterranean  
Note: Results are from 2023 YouGov Canada Omnibus Survey  
Base: General population aged 18+ (n=2122)

# POTENTIAL MARKET SIZE FOR CANADA (NEXT 2 YEARS)



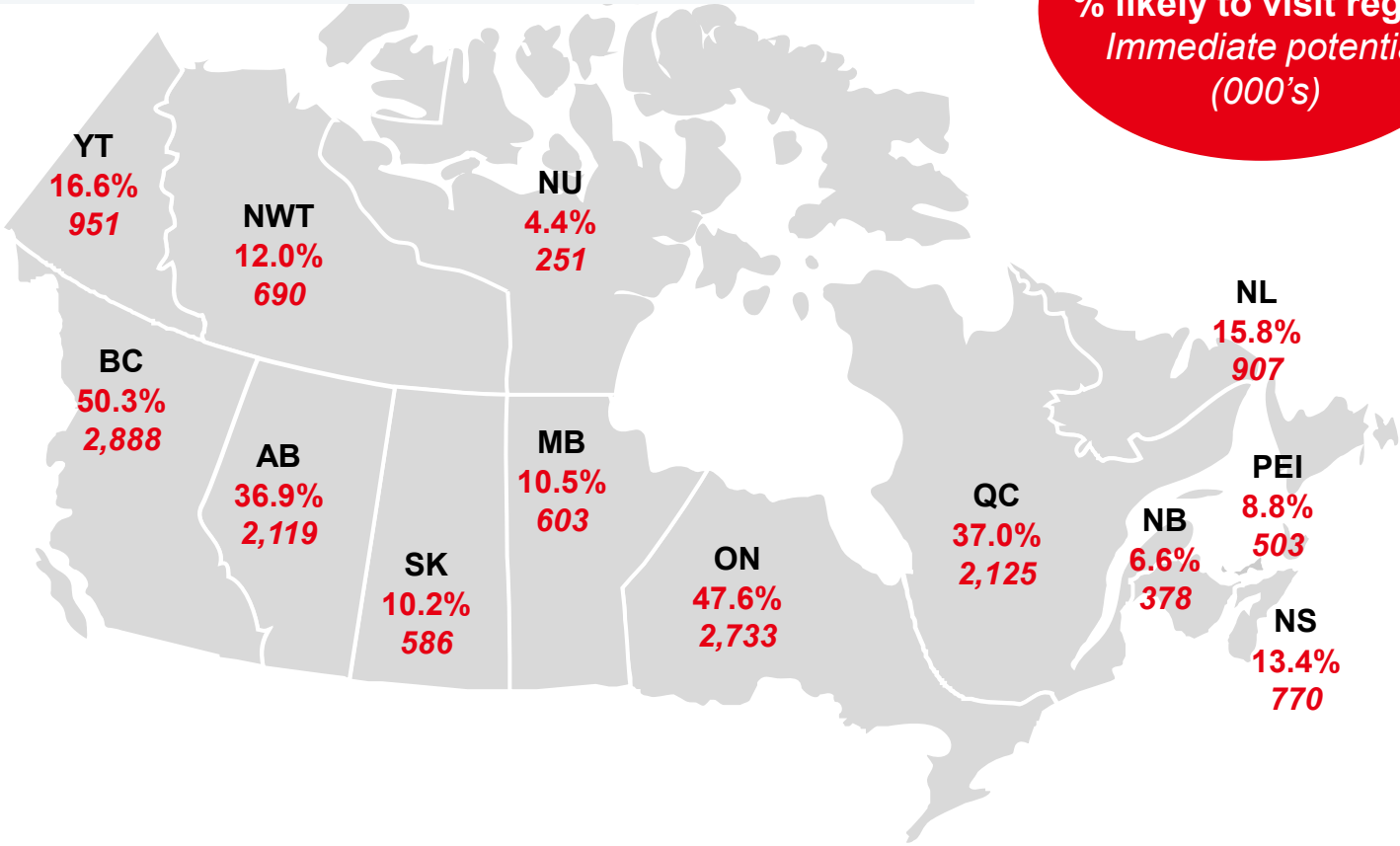
<sup>1</sup> Includes respondents likely to visit Canada for a trip of 1 to 3 nights, or a trip of 4 nights or more.  
Base: Target market for Canada = long-haul pleasure travellers (past 3 years or next 2 years) (n=1535); Immediate potential for Canada = dream to purchase stages for P2P for Canada (n=1005)  
C1. 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)  
E1. Realistically, how likely are you to take a holiday trip to Canada in the next 2 years? (Select one)

# POTENTIAL MARKET SIZE BY REGION

BC and Ontario have the potential to draw in over 2.7 million German travellers each over the next 2 years.

Immediate Potential for Canada: **5,739,000**

**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=1005)  
 E2. 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)



Nunavut



# 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%	16%	24%	21%
Alberta	4%	13%	17%	12%
Saskatchewan	1%	5%	6%	3%
Manitoba	1%	4%	5%	4%
Ontario	3%	14%	24%	19%
Quebec	4%	12%	18%	14%
New Brunswick	1%	2%	4%	3%
Nova Scotia	1%	4%	7%	6%
Prince Edward Island	2%	3%	4%	4%
Newfoundland & Labrador	2%	5%	8%	6%
Yukon	2%	5%	9%	7%
Northwest Territories	1%	4%	7%	6%
Nunavut	1%	1%	2%	2%

Base: Those in the dream to purchase stages of the path to purchase for Canada & definitely/likely to take a trip to Canada (n=1005) E3a-m. During what time of year are you considering visiting [PROVINCE]? (Select all that apply)



German travellers show a strong seasonal preference for summer, followed by fall.



Whitehorse  
Yukon

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# CANADA VS. COMPETITORS

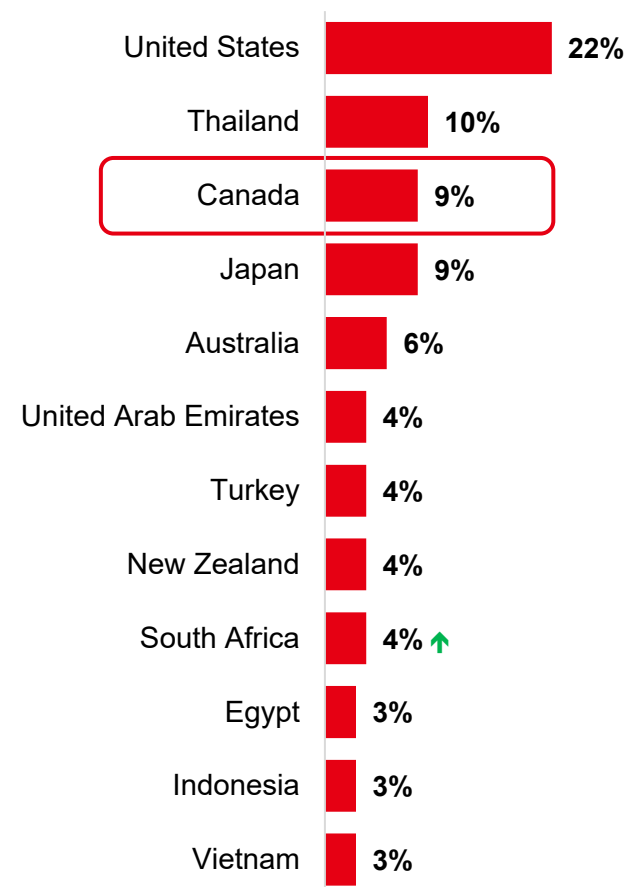


Alberta



# UNAIDED DESTINATION CONSIDERATION (NEXT 2 YEARS)<sup>1</sup>

On an unaided basis, Canada ranks third, tied with Japan, as a destination that German travellers are considering for a long-haul holiday trip in the next two years.



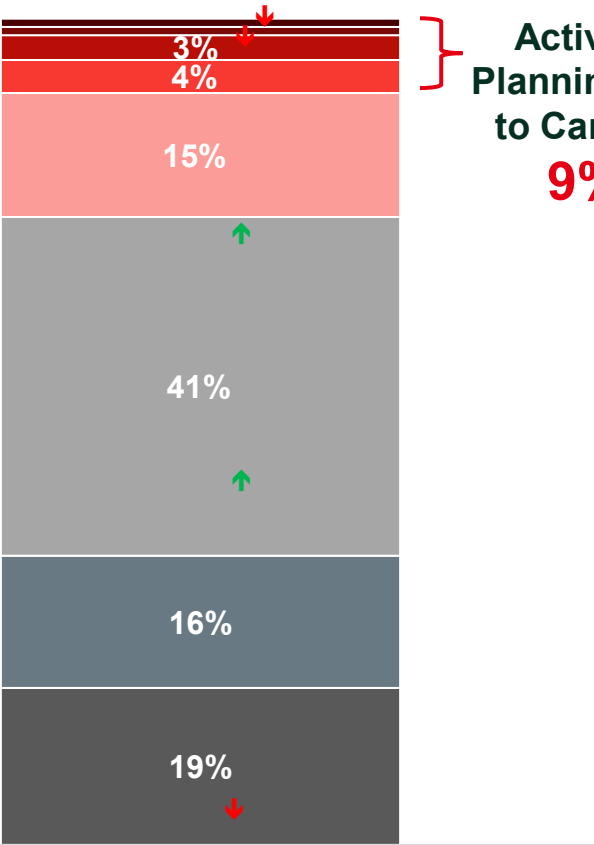
<sup>1</sup> Roll-up of brand mentions by country (e.g., percentage who said "Canada" or any destination in Canada).  
Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1535)  
B1. You mentioned that you are likely to take long-haul holiday trip in the next 2 years. Which destinations are you seriously considering? (Please list up to 3 destinations)





# 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



Actively  
Planning trip  
to Canada  
9% ↓

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

↑ / ↓ = significantly higher/lower result (2024 vs. 2023)

Note: all respondents evaluated Canada plus 3 randomly selected countries from the competitive set.  
Base: Long-haul pleasure travellers (past 3 years or next 2 years), Evaluated Canada (n=1535)  
C1. Which of the following best describes your current situation when thinking about each of the following destinations for a vacation trip? (Select one for each)



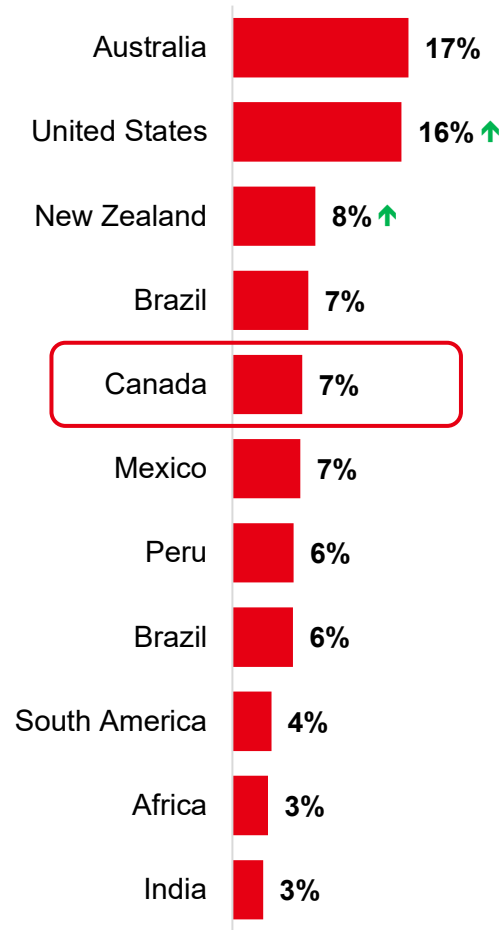
# INDIGENOUS TRAVEL



Carcross  
Yukon



# UNAIDED INDIGENOUS DESTINATION



↑ / ↓ = significantly higher/lower result (2024 vs. 2023)  
Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1535)  
B4. [DESCRIPTION] What destinations come to mind when thinking about **Indigenous tourism**? (Please list up to 3 destinations. You can mention destinations within or outside of Europe, North Africa and the Mediterranean.)  
[DESCRIPTION] Please note: You do not have to limit your responses to destinations you are considering for a holiday trip.



On an unaided basis, Canada ranks fourth when thinking of Indigenous tourism destinations, tied with Brazil and Mexico.



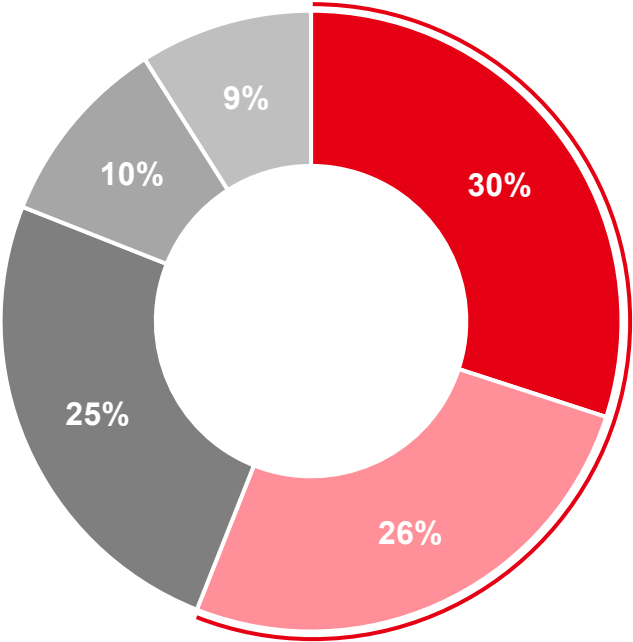
# INTEREST IN INDIGENOUS DESTINATIONS

Over one half of German travellers are interested in participating in Indigenous experiences in Canada, with three in ten being very interested.



 Kelowna  
British Columbia

- 5 - Very interested
- 4
- 3
- 2
- 1 - Not at all interested




4 or 5 (out of 5)  
**56%**

Note: respondents were asked either about interest in Indigenous destinations (C10) or factors to drive interest in Indigenous cultural experiences (C11)  
Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=768)  
C10. As you may or may not know, Indigenous peoples are descendants of the original inhabitants of a country or region before people of different cultures or origins arrived. They have unique traditions and ways of life that are often distinct from the larger societies where they live. Indigenous tourism businesses are owned or operated by Indigenous people. How interested are you in participating in Indigenous cultural experiences and tourism activities in the following destinations?

# FACTORS TO DRIVE INTEREST IN INDIGENOUS CULTURAL EXPERIENCES

**Safety and comfort of the destination, followed by cultural significance and uniqueness are the most mentioned factors driving interest in Indigenous cultural experiences.**



 **Victoria**  
British Columbia

Note: respondents were asked either about interest in Indigenous destinations (C10) or factors to drive interest in Indigenous cultural experiences (C11)  
Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=767)  
C11. What factors would increase your interest in participating in Indigenous cultural experiences and tourism activities in a destination? (Select up to 3)



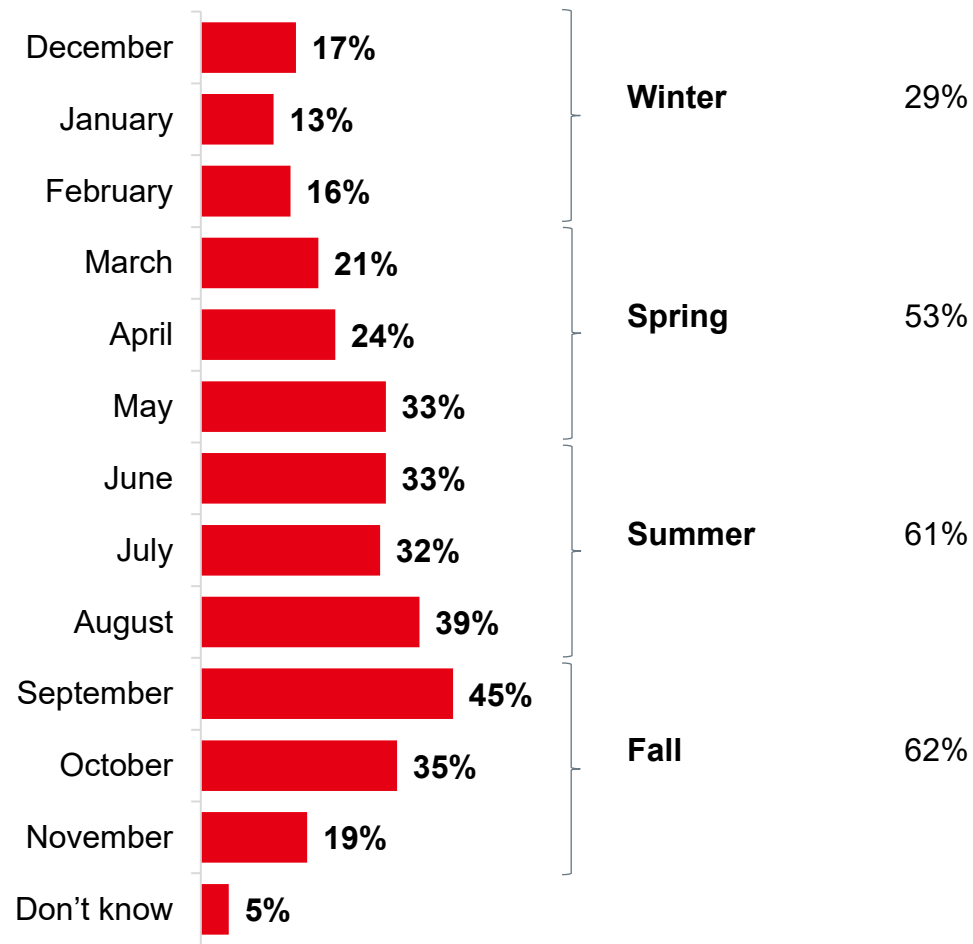
# TRAVEL BEHAVIOURS



Montreal  
Quebec



# PREFERRED TIME OF YEAR FOR HOLIDAY TRIPS



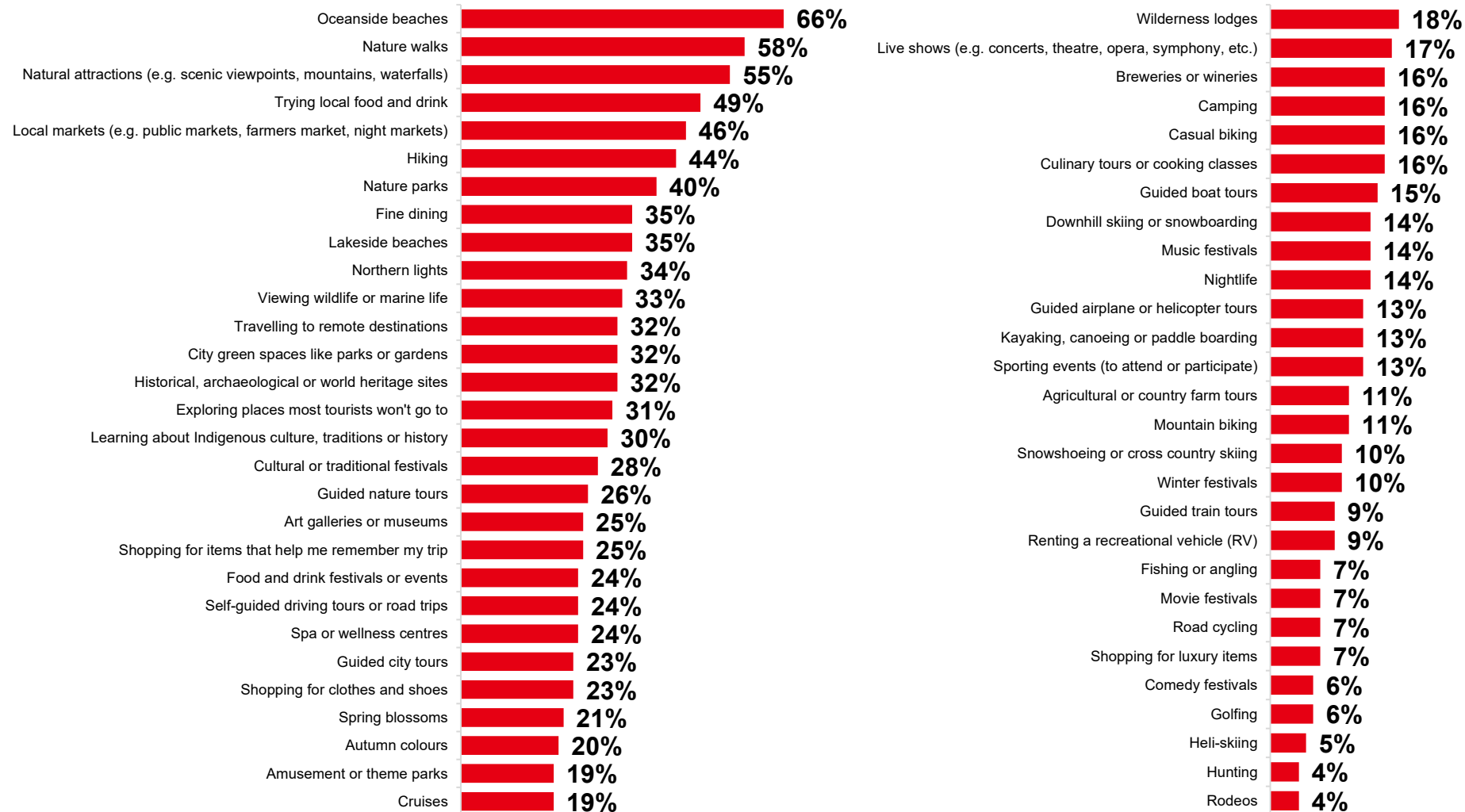
**Fall and summer are the preferred time of year for holiday trips, with September and August being the most popular months among German travellers.**



Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1535)  
D1. In general, what time of year do you typically like to take holiday trips? Select all that apply

# GENERAL ACTIVITIES INTERESTED IN (FULL LIST)

**Top activities when on a holiday include oceanside beaches, nature walks, and natural attractions.**

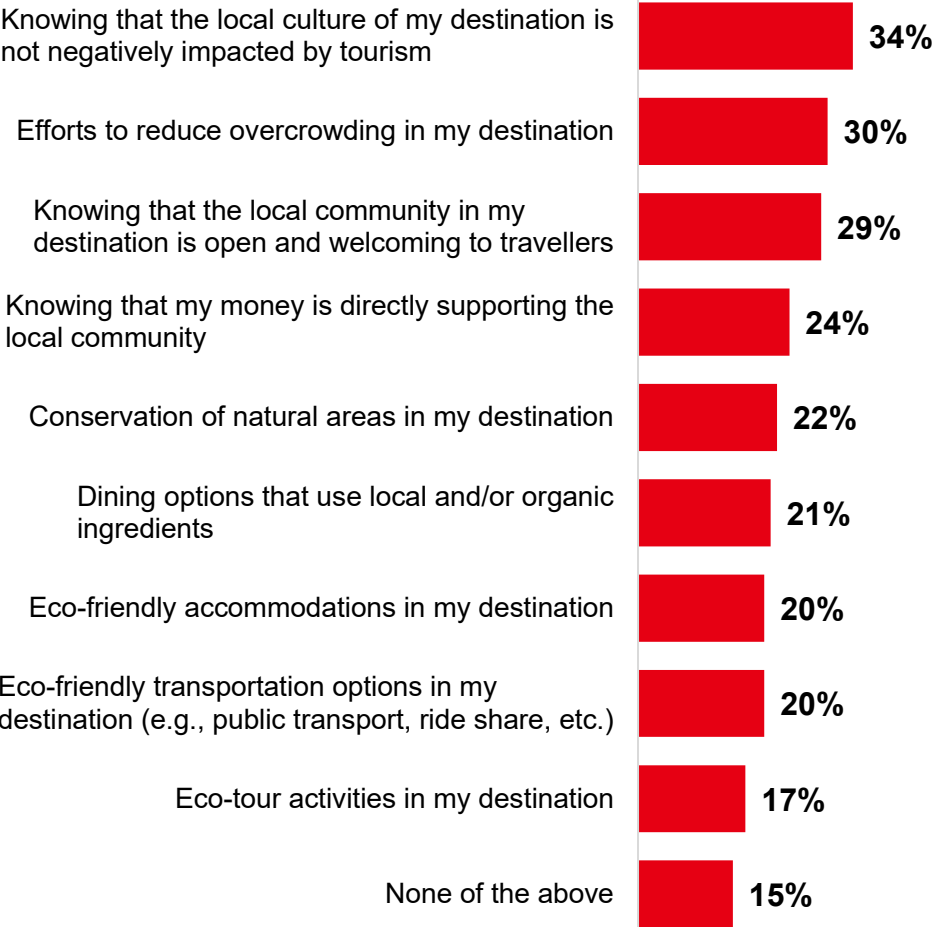


Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1535)  
D4. In general, what activities or places are you interested in while on holiday? (Select all that apply)



# TOP 3 MOST IMPORTANT SUSTAINABILITY EFFORTS

The most important sustainability efforts are knowing that the local culture of the destination are not negatively impacted by tourism, efforts to reduce overcrowding in the destination, and knowing that the local community is open and welcoming to travellers.



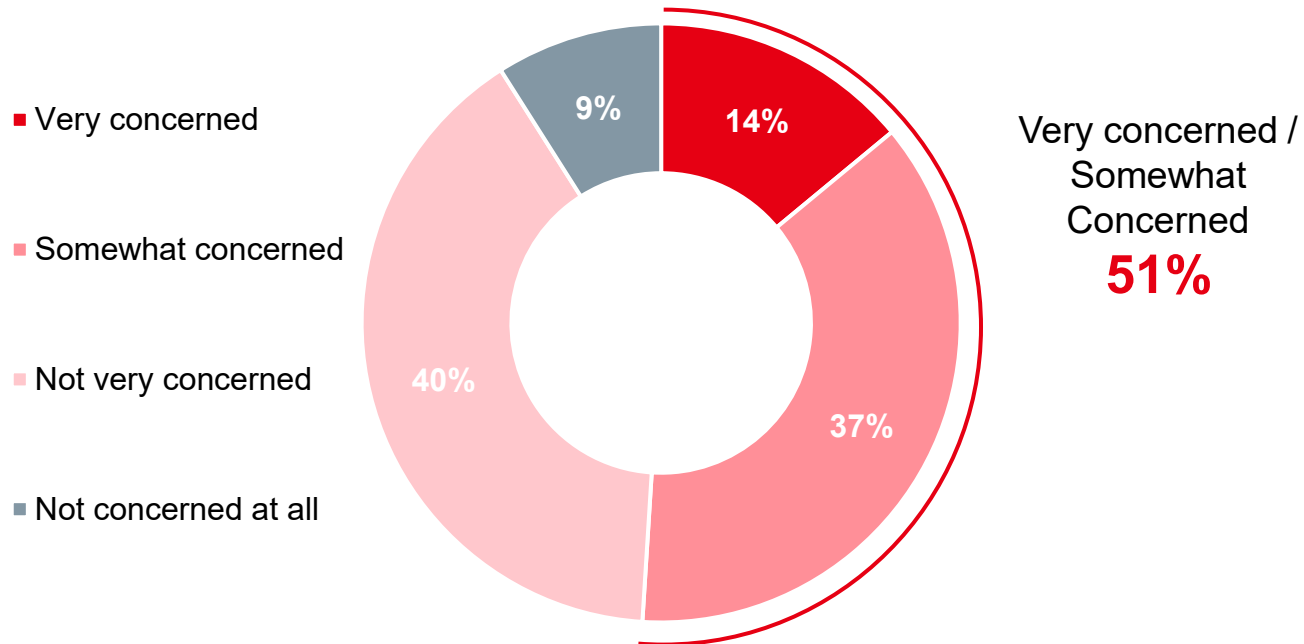
### Sustainable Travel Description

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”.

Note: respondents were asked either about most important sustainability efforts (D8) or barriers to sustainable travel (D9)  
Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=776)  
D8. What are the top 3 sustainability efforts that are most important to you when selecting a holiday destination? Select up to three choices.



# IMPACT OF EXTREME WEATHER EVENTS ON TRAVEL PLANS



**54%** state extreme weather events will **significantly or moderately impact** their travel decisions in the next year

↑ / ↓ = significantly higher/lower result (2024 vs. 2023)

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1535)

D10. 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. How concerned are you about extreme weather events affecting your travel plans?

D15. To what extent do you expect extreme weather events to impact your future travel decisions in the next year?

**One half of German travellers are concerned about extreme weather impacting their travel plans, with over one half stating that extreme weather will impact their future travel decisions.**



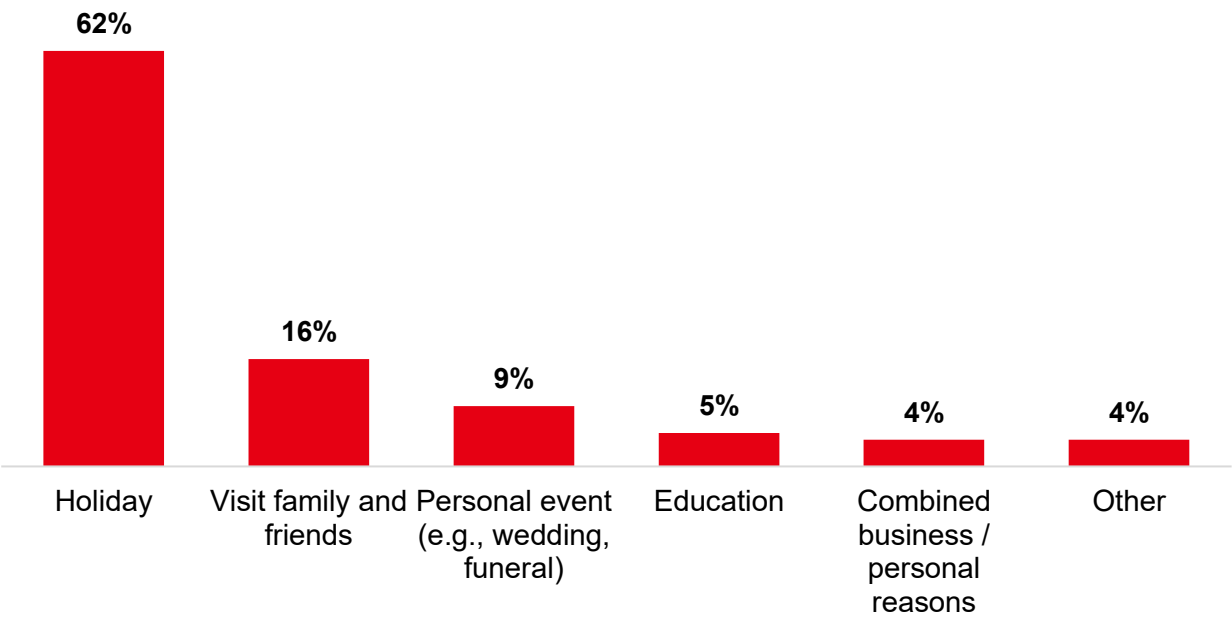
# MOST RECENT TRIP



Le Pays de la Sagouine  
New Brunswick



# MAIN PURPOSE OF RECENT TRIP



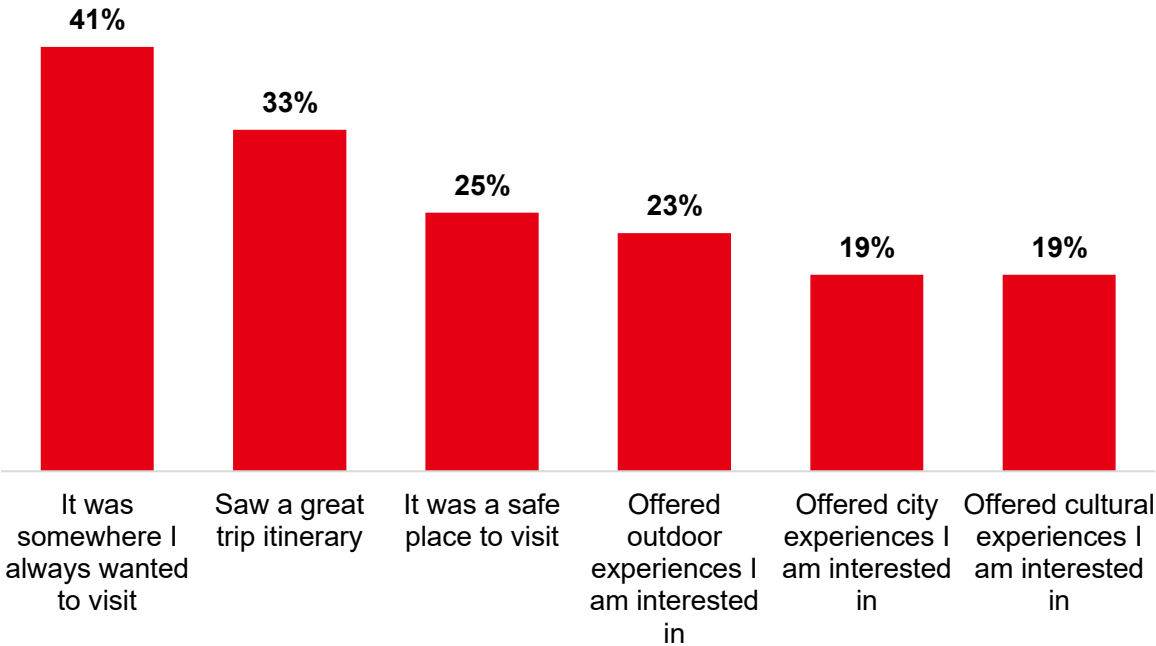
Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to Canada past 3 years (n=133)  
F2. What was the main purpose of this trip? (Select one)

Over six in ten German travellers to Canada in the past three years were going on a holiday trip.



Nahanni National Park Reserves  
Northwest Territories

# FACTORS IN CHOOSING DESTINATION FOR RECENT TRIP (TOP 6)



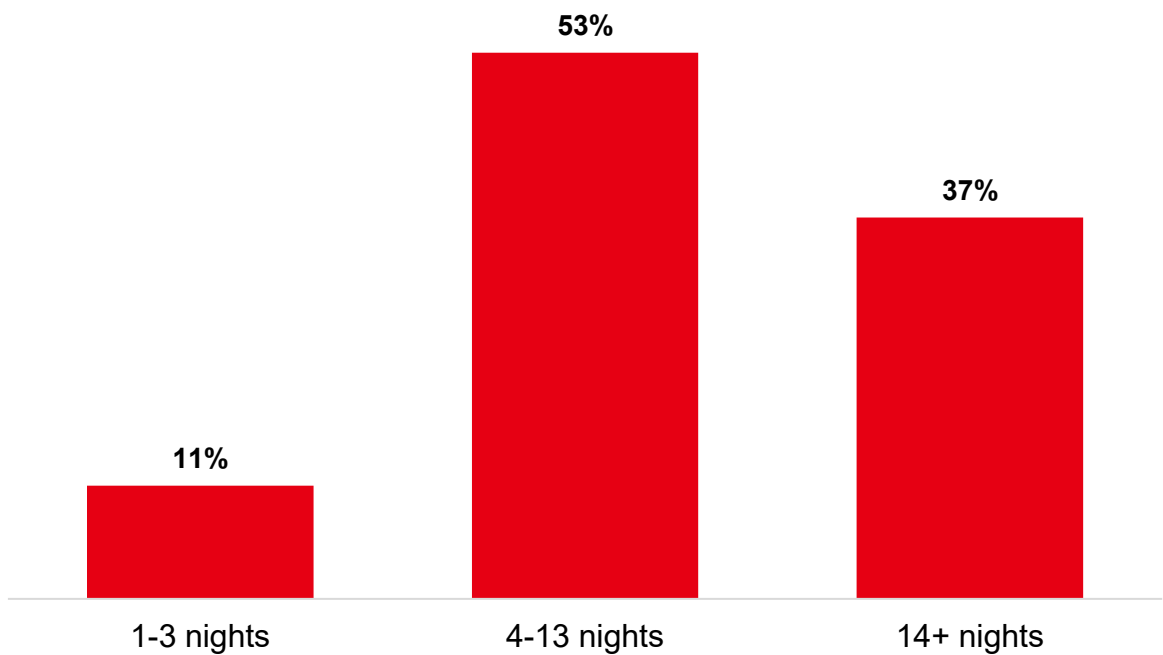
The top factors for choosing Canada for their most recent trip were that it was somewhere they always wanted to visit, seeing a great trip itinerary, and safety.

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to Canada past 3 years, Took a holiday (n=83)  
F3. Which of the following factored into your choice of destination for this trip? (Select all that apply)





# NIGHTS SPENT DURING RECENT TRIP: BY DESTINATION



Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to Canada past 3 years (n=133)  
F4. How many nights did you spend in this destination?

Over one half of German travellers to Canada stayed for 4-13 nights.

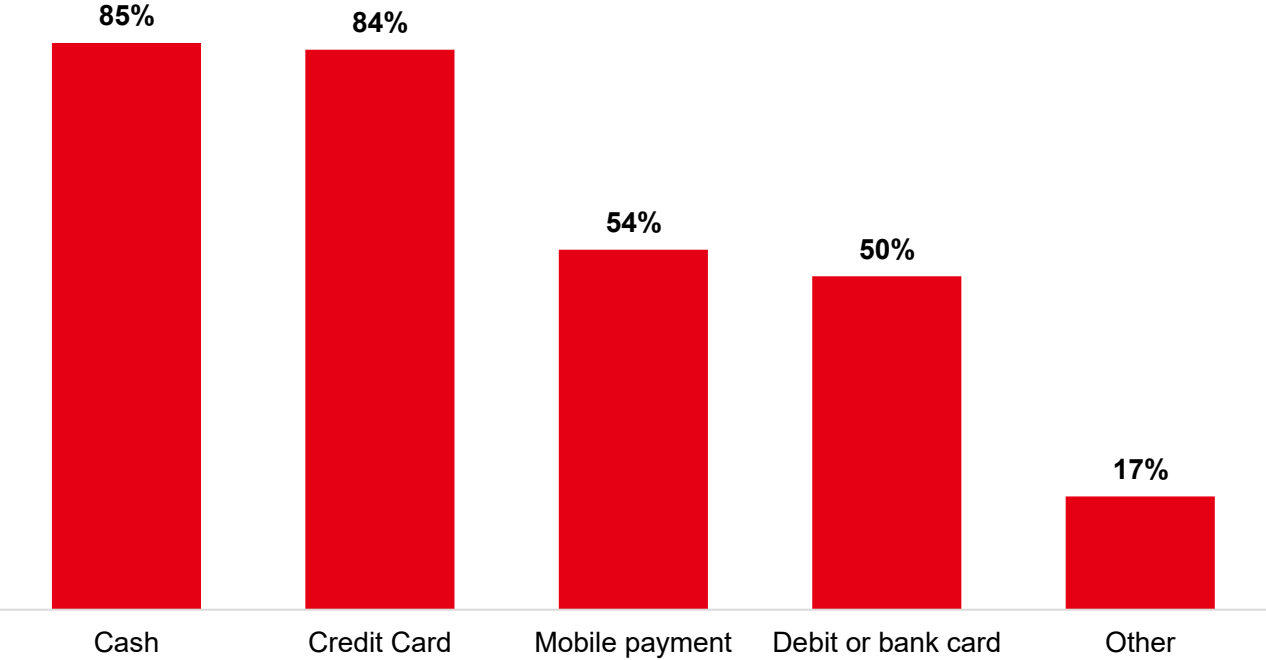


Barren Canyon, Algonquin Park  
Ontario

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# PAYMENT METHODS FOR RECENT TRIP



Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to Canada past 3 years (n=133)  
F8. Approximately what percentage of your purchases did you make during your trip with each of the following payment methods? Your best guess is fine. (Enter one number per row. Your total must add to 100%).

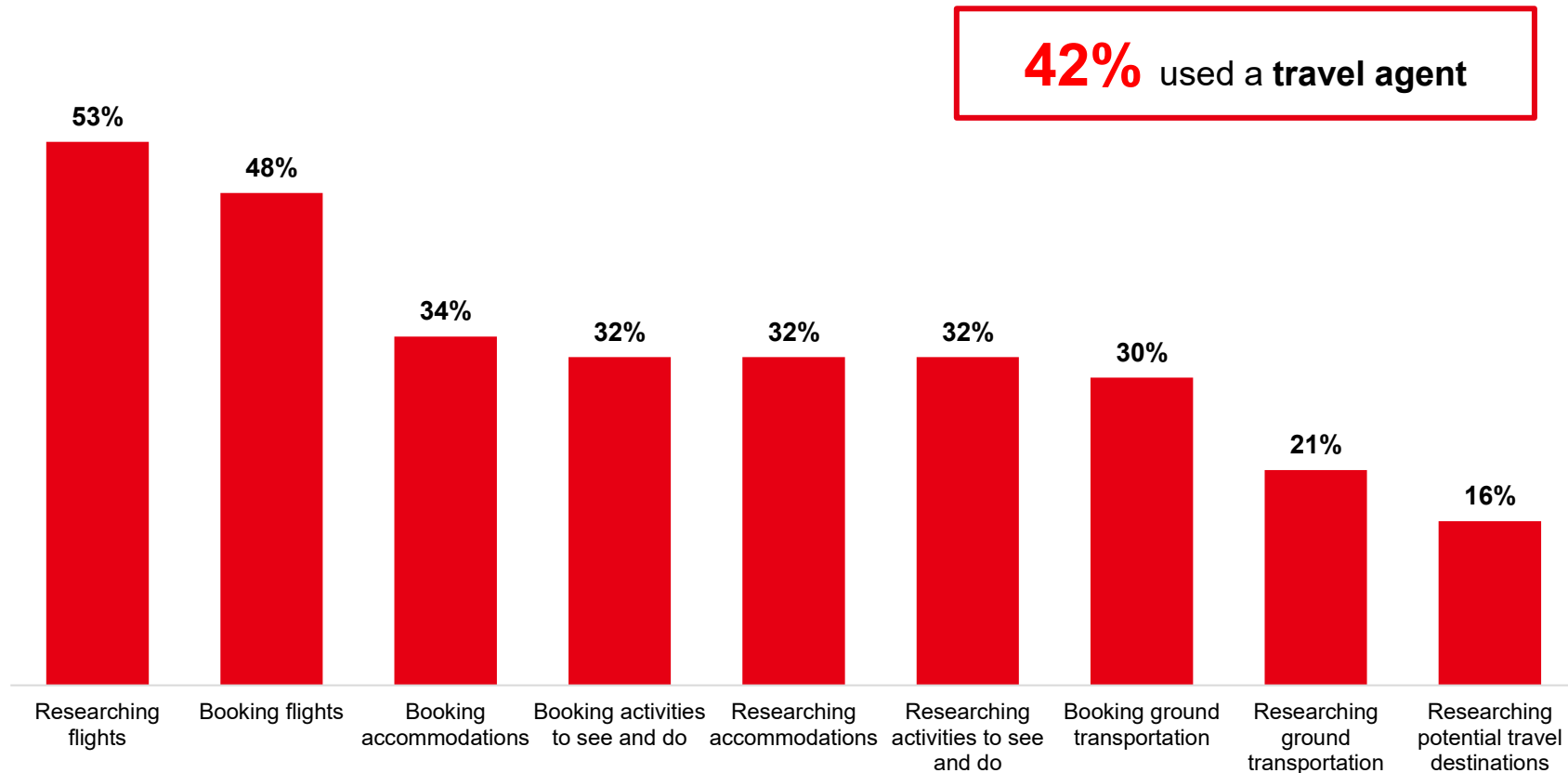


The most common payment methods German travellers used for their most recent trip to Canada were cash or credit card.





# TRAVEL AGENTS/TOUR OPERATOR USAGE FOR RECENT TRIP (AMONG THOSE WHO USED A TRAVEL AGENT/TOUR OPERATOR)



Over four in ten German travellers to Canada used a travel agent, most likely for researching or booking flights.

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination past 3 years (n=133) Travelled to any destination past 3 years, Used a Travel Agent/Tour Operator (n=56)

F9. 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 Carrefour Voyages or Voyageurs du Monde, 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)

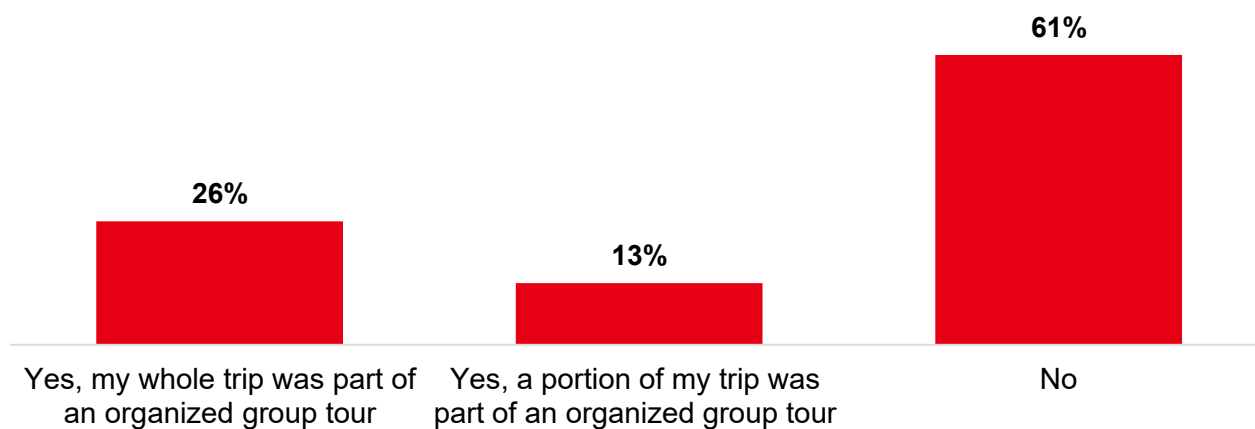
F10. Which of the following did a travel agent or tour operator help you with?

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Twin Falls Lodge  
Saskatchewan



# ORGANIZED GROUP TOUR FOR RECENT TRIP



Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to Canada past 3 years (n=133)  
F11. 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?

Over one quarter of German travellers to Canada in the past three years used an organized group tour for their whole trip, and another one in ten used one for a portion of their trip.



Saskatoon

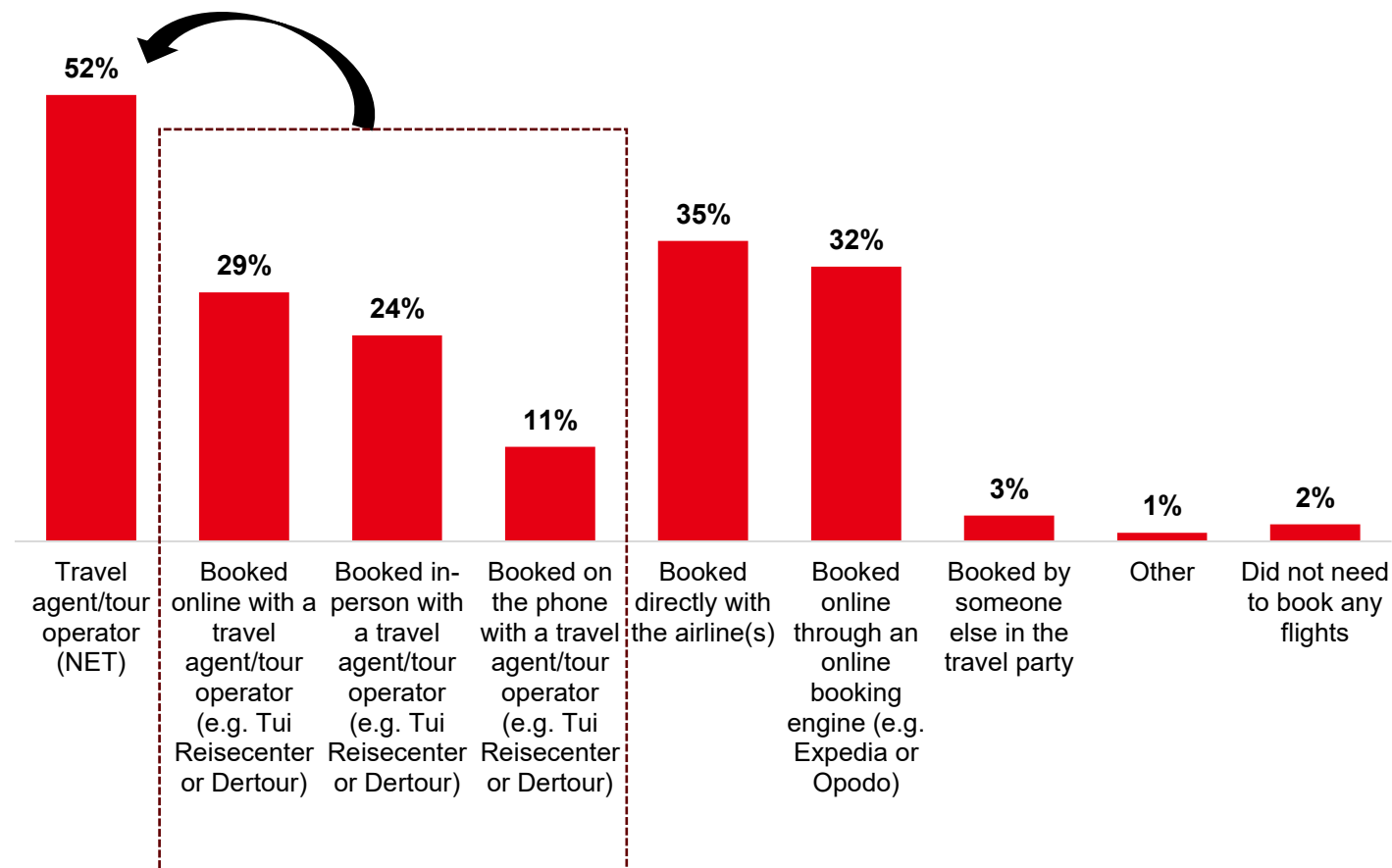
Saskatchewan

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# BOOKING FLIGHTS FOR RECENT TRIP



Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to Canada past 3 years (n=133)  
F12. How did you book your flight for this trip? (Select all that apply)

Over one half of recent travellers to Canada booked flights through a travel agent or tour operator.

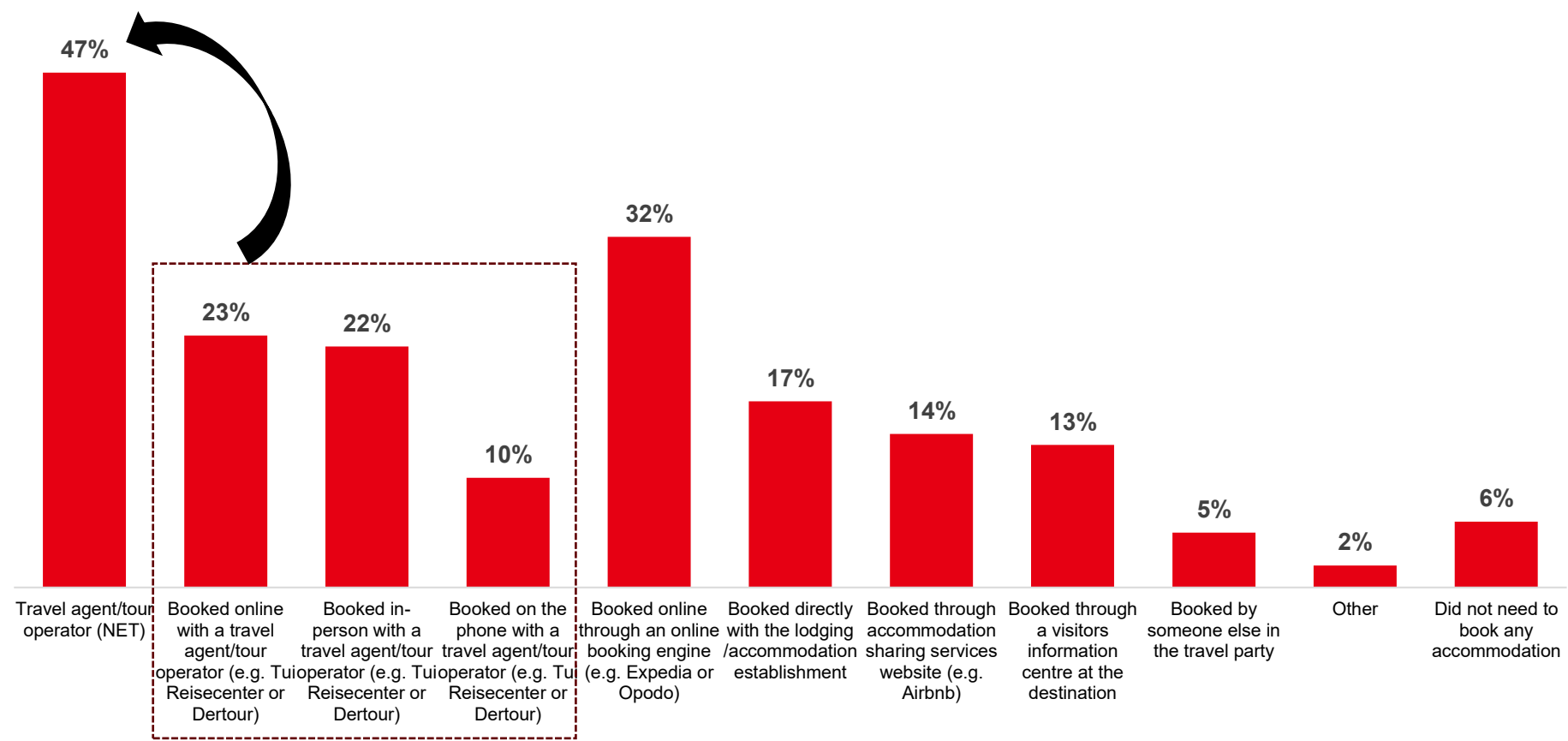


Montmorency Falls Park, Quebec City  
Quebec

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# BOOKING ACCOMMODATIONS FOR RECENT TRIP



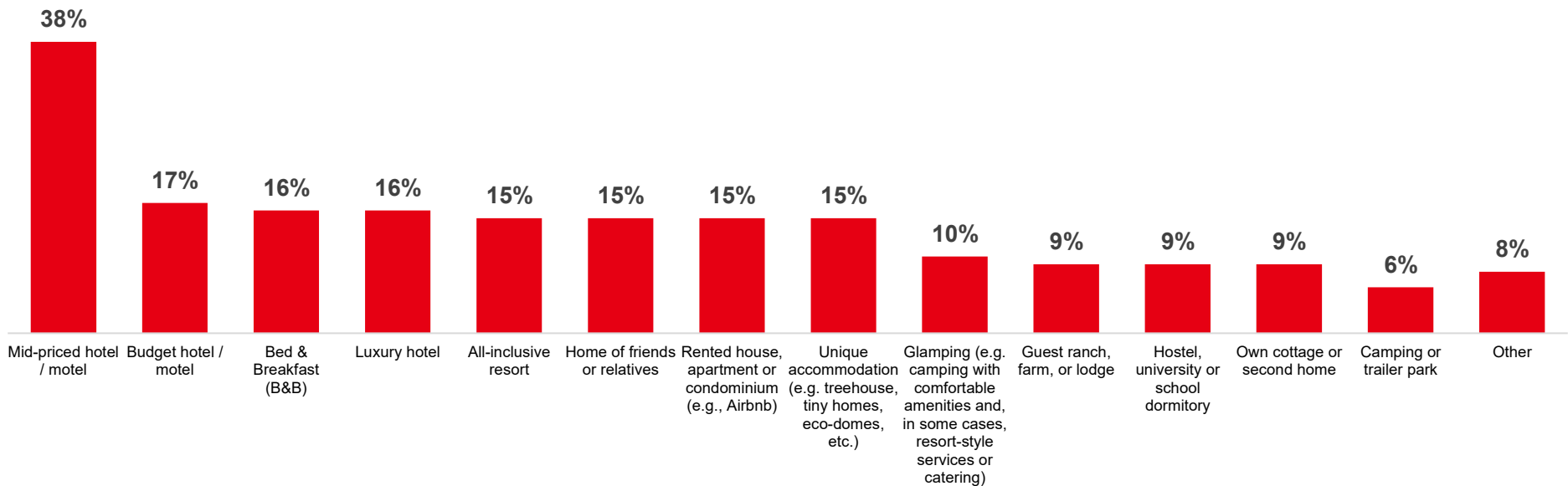
Almost one half of recent travellers to Canada booked their accommodations through a travel agent or tour operator.

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to Canada past 3 years (n=133)  
F13. How did you book your accommodation for this trip? (Select all that apply)





# TYPE OF ACCOMMODATIONS FOR RECENT TRIP



Nearly four in ten German travellers visiting Canada stayed at a mid-priced hotel or motel.

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to Canada past 3 years, Booked Accommodations (n=125)  
F14. Which type of accommodation did you stay in during this trip? (Select all that apply)



# THANK YOU

For any questions, please reach out to [research@destinationcanada.com](mailto:research@destinationcanada.com)

