2024 GLOBAL TRAVELLER RESEARCH PROGRAM

GERMANY STRATEGIC REPORT

Sunshine Coast *British Columbia*

Canada

DESTINATION CANADA

CANADIAN TOURISM DATA collective

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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

November 19th – December 6th 2024

Geographical Definition for Qualified Trips

Outside of: Europe, North Africa and the Mediterranean

Sample Distribution

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.

SEGMENT DESCRIPTION SLIDES

Destination Canada categorizes travellers into seven key segments using a short series of questions called the **Traveller Segmentation Program typing tool**. Four segments have been identified by Destination Canada as having higher economic and responsible values that most benefit Canadian communities – these segments are referred to as Highly Engaged Guests and are Destination Canada's recommendation for all international leisure tourism targeting towards Canada. Throughout this report audience breakouts are included sometimes for Highly Engaged Guests (HEGs) as a whole and for individual segments that make up Highly Engaged Guests.

HIGHLY ENGAGED GUESTS

Outdoor Explorers
Base motivations

Novel & Authentic
Adventure
New Connections

Culture Seekers
Base motivations

Novel & Authentic
New Connections
Familiarity

Refined Globetrotters
Base motivations

Novel & Authentic
Security
Fun

Purpose Driven Families
Base motivations

New Connections
Bonding
Traditions

OTHER TRAVELLER SEGMENTS

City Trippers
Base motivations

Fun
Security
Escape & Relax

Simplicity Lovers
Base motivations

Escape & Relax
Security
Simplicity

Fun & Sun Families
Base motivations

Escape & Relax
Bonding
Fun

To Learn More

If you'd like to learn more about Destination Canada's segments, and their motivations, explore detailed market profiles, training options, and segment identification tools at TourismDataCollective.ca/Segmentation

DESTINATION CANADA

KEY INSIGHTS

KEY INSIGHTS

Canada's Market Potential & Competitive Destinations

- The immediate market potential for Canada is 5.7M German travellers
- The four HEG segments represent over eight in ten (83%) of the immediate market potential:
  - ✓ **Outdoor Explorers (OE)** are the largest priority segment and represent 1.7M German travellers
  - ✓ **Culture Seekers (CS)** are the second largest priority segment and represent 1.2M German travellers
  - ✓ **Refined Globetrotters (RG)** are not far behind Culture Seekers accounting for 1.1M German travellers
  - ✓ At 679K German travellers, **Purpose Driven Families (PDF)** represent the smallest segment
- In addition to the US, Canada is competing against popular destinations among German travellers such as Thailand and the UAE. These destinations not only have higher past visitation rates, but they also do a better job at converting to serious consideration
  - Thailand, for example, stands out as both being a good value for the money *and* having a culture they want to experience
  - And, the UAE has a more distinct image overall and is a place where they can experience new things
- German travellers view Canada as having beautiful natural scenery/ landscapes and unique natural wonders to discover. It is also a destination where they can explore new things and places. However, there is an opportunity to further educate them on what Canada has to offer as only 28% say they have at least very good knowledge of the destination, and this is weaker than their knowledge of the US
- In addition to competing with destinations higher on the priority list, cost is a top factor that would discourage Germans from travelling to Canada. This is true among all segments, although more of a concern for **Outdoor Explorers** – a top priority segment

KEY INSIGHTS

Key Drivers & Opportunities by Priority Segment

Outdoor Explorers

- **Outdoor Explorers** are just as likely to have ever visited Canada than the average German traveller. However, they have the highest NPS score (+46) suggesting their visit to Canada was an exceptionally positive one
- They view Canada as a *safe destination that provides holidays without surprises*. It is *environmentally-friendly* and *socially responsible, offering outdoor activities* and *opportunities to see wildlife in its natural habitat*
- Canada's key strengths align with the highly influential attributes for Outdoor Explorers, including *personal meaning, and wanting to visit with family and friends*
- However, there's an opportunity to strengthen these perceptions as well those more moderate drivers such as *destination where I can explore new things, culture I want to experience and place I can experience things I can't experience at home*

Refined Globetrotters

- At 32%, **Refined Globetrotters** are more likely to have visited Canada in the past than Outdoor Explorers (25%)
- They too have a very high NPS (+38) score, the second highest of all segments
- Canada is viewed by Refined Globetrotters as an *environmentally friendly, socially responsible location* with *great outdoor/physical activities* as well *as a great place to see wildlife in its natural habitat*
- While Canada has a more distinct profile on less influential drivers of consideration such as those previously mentioned, the destination would benefit by bolstering perceptions related to *personal meaning, place I want to visit with friends/family, culture I want to experience and destination where I can explore new things/places*

KEY INSIGHTS

Fall Travel

- Seasonal potential continues to be higher in the Fall (6.9M Total) vs. the Winter (2.8M)
- This may be driven, at least in part, by the fact that Canada is viewed as a more unique Fall destination vs. a Winter destination
- Not only is the weather far less of a barrier in the Fall, one-third (30%) are motivated by the fact that there are less crowds at the places they want to visit during these months
- These motivators are relatively stronger among **Refined Globetrotters**
- While consideration to travel to Canada in the Fall (46%) is comparable to the US (also 46%), it’s worth noting that consideration did decrease vs. year ago
- That said, HEGs have higher consideration than Total Travellers and that was consistent year over year

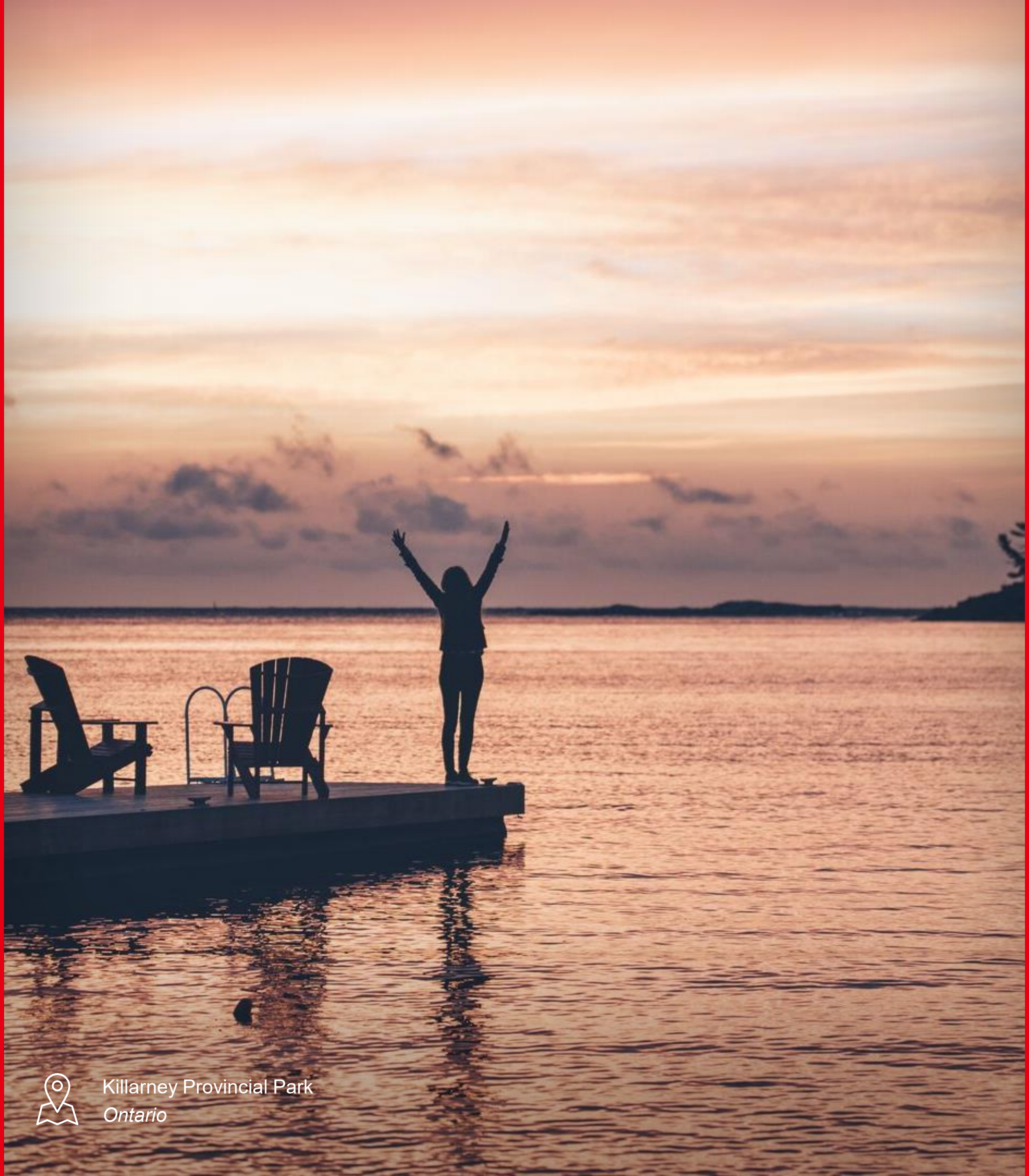
Winter Travel

- Of the competitive destinations, Canada is the least considered for Winter travel (19%)
- The Winter weather in Canada is polarizing among German travellers. While three in ten (32%) view it as a motivator, four in ten say it is too cold at the places they want to visit
- Canada is also competing with European destinations such as Austria, Switzerland, Norway and Finland for share of mind as it relates to Winter travel
- Among **Refined Globetrotters**, the list of unaided European destinations is even longer with Canada also trailing behind Italy, Germany and Sweden

KEY INSIGHTS

Recent Trip to Canada: Profile

- Two-thirds (62%) of all Germans who travelled to Canada did so for leisure. This was an increase vs. year ago as we saw a shift from combined business/personal to solely holiday visits
- Summer is the most popular time to visit Canada, with August being the peak month
- Most trips to Canada were at least four nights in length with the majority falling in the 4–13 night range
- Top activities for both **Outdoor Explorers** and **Refined Globetrotters** included nature walks, hiking and other natural attractions
- Trips to Canada differed from other destinations in the following ways:
  - One-quarter (26%) travelled with friends compared to just 17% among those travelling to other destinations. This aligns with the notably higher number of Canadian Travellers who stayed either at the home of friends/relatives or their own cottage/second home
  - Use of travel agents was also somewhat higher for Canada trips (42%) than other destinations (34%)
  - Travel agent services used for Canada trips were more research-based while other destinations skewed towards booking flights or accommodations



Killarney Provincial Park
Ontario

MARKET SIZING

MARKET SIZING – LONG-HAUL TRAVELLERS

Total Population 18+	**69,700,000 (Total DE Population 18+)**
26% Took a Long-Haul^ 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)**

^ 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)

Germany's immediate potential visitation to Canada stands at 5.7M, with the overall target market and likelihood to visit remaining stable vs. year ago.

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)*	**65.5%**
	=
Size of the Target Market	**14,883,000**
	x
Immediate Potential for Canada *(Will definitely/very likely visit Canada in the next 2 years[1])*	**38.6%**
	=
Immediate Potential	**5,739,000**

[1] 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)

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

POTENTIAL MARKET SIZE FOR CANADA (NEXT 2 YEARS): BY SEGMENT

DESTINATION CANADA

Among the four segments, OEs present the greatest opportunity, though seasonal potential is consistently higher in fall than in winter across all segments.

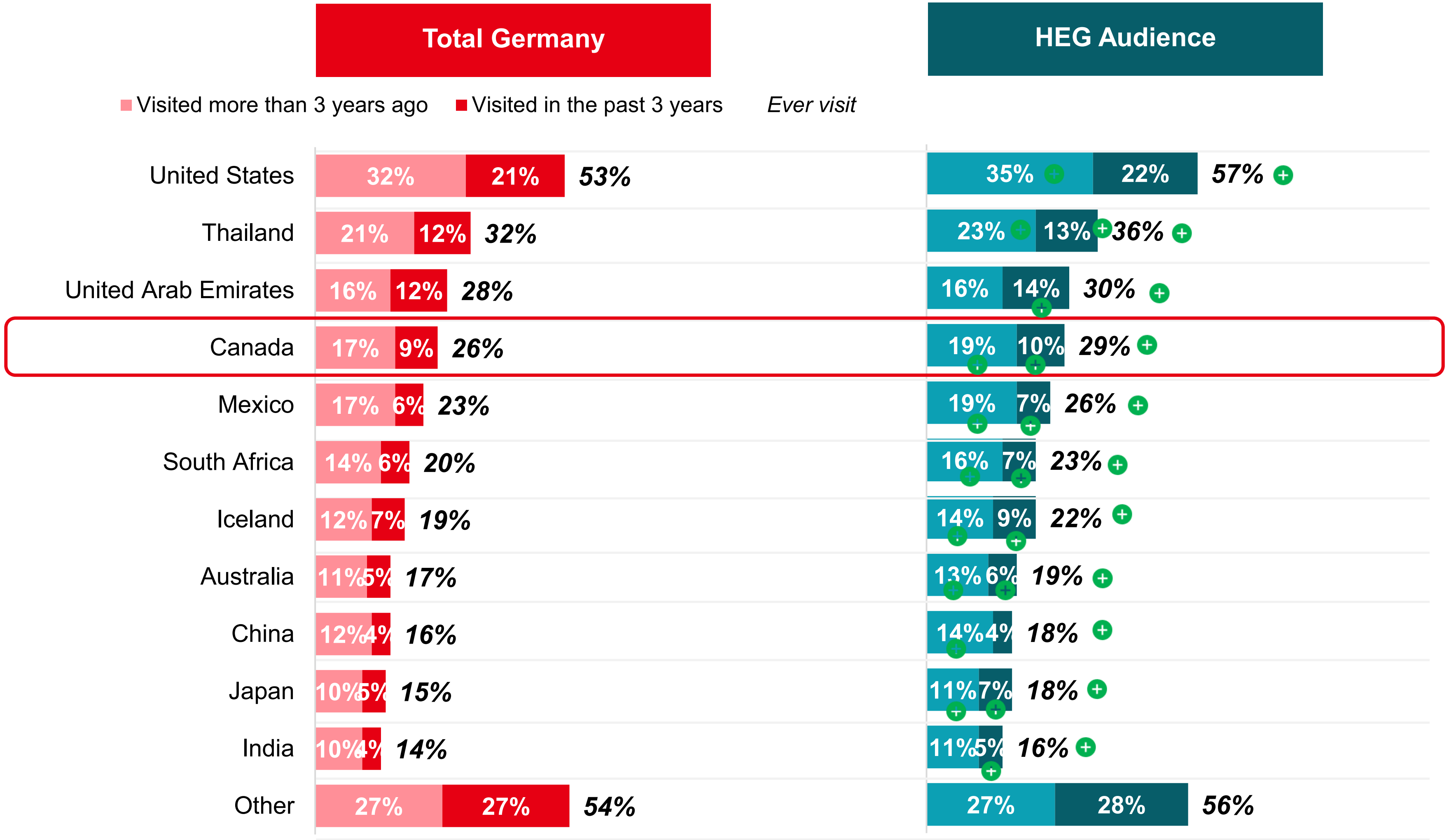
	22,722,000 (Total Long-Haul Travellers)							
Total segment sizes	5,905,500 Outdoor Explorers		3,922,000 Culture Seekers		4,349,000 Refined Globetrotters		2,229,000 Purpose Driven Families	
X **Target Market for Canada** *(Those in the dream to purchase stages of the path to purchase for Canada)*	76.4%		68.5%		66.4%		68.9%	
= Size of the Target Market	**4,509,000**		**2,685,500**		**2,888,000**		**1,535,000**	
X **Immediate Potential for Canada** *(Will definitely/very likely visit Canada in the next 2 years[1])*	38.6%		45.3%		39.5%		44.2%	
= Immediate Potential	**1,738,000**		**1,215,500**		**1,141,500**		**679,000**	
X **Immediate Seasonal Potential** *(Consideration for Canada in [SEASON] in next 2 years)*	**Fall** 51.3%	**Winter** 22.3%	**Fall** 38.1%	**Winter** 34.4%	**Fall** 57.2%	**Winter** 30.1%	**Fall** 49.7%*	**Winter** 28.9%*
= Immediate Seasonal Potential	**Fall** 891,500	**Winter** 387,500	**Fall** 462,500	**Winter** 417,500	**Fall** 652,500	**Winter** 343,500	**Fall** 309,000	**Winter** 196,000

[1] 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): Outdoor Explorers (n=398); Culture Seekers (n=264); Refined Globetrotters (n=294); Purpose Driven Families (n=151)
Immediate potential for Canada = dream to purchase stages for P2P for Canada: Outdoor Explorers (n=304); Culture Seekers (n=181); Refined Globetrotters (n=195); Purpose Driven Families (n=104)
Immediate autumn potential for Canada: Outdoor Explorers (n=1117); Culture Seekers (n=82); Refined Globetrotters (n=77); Purpose Driven Families (n=46*); Immediate winter potential for Canada: Outdoor Explorers (n=1117); Culture Seekers (n=82); Refined Globetrotters (n=77); Purpose Driven Families (n=46*)
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)
C7. For each of the following destinations, during which months would you consider taking long-haul trip <u>in the next two years</u>?
*Small base size, interpret with caution (n<50)

CANADA VS. COMPETITORS

PAST VISITATION

Canada ranks fourth among past visited destinations for German travellers, with 26% having visited, including 9% within the past three years. Visitation is slightly higher among the HEG audience at 29% ever visited and RGs at 32%.

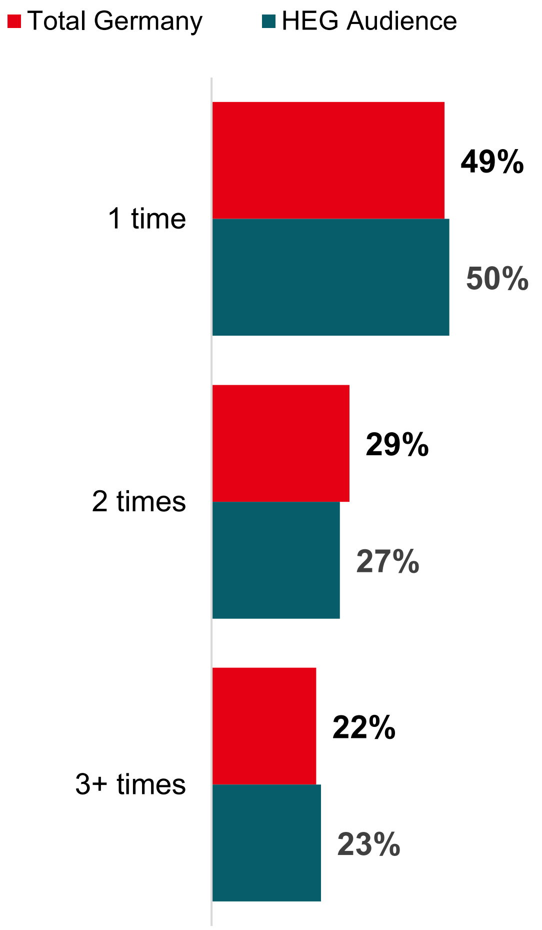


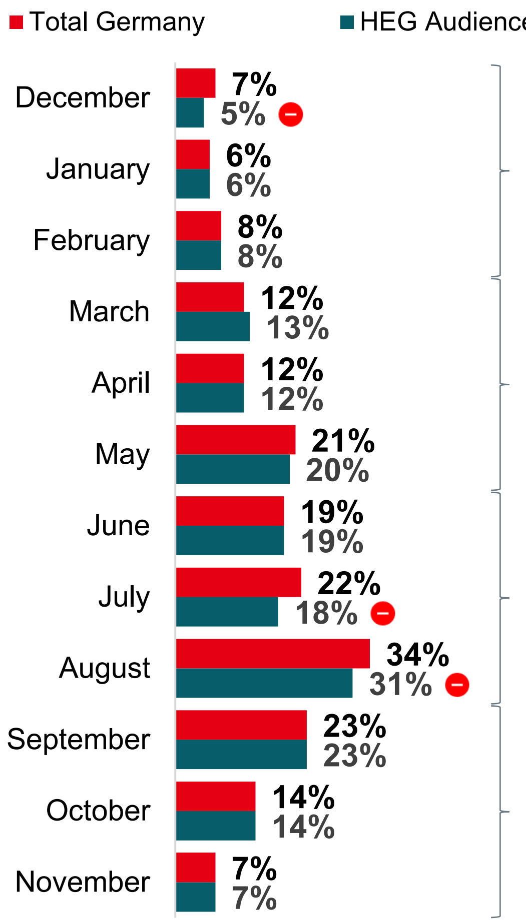
Ever visit Canada:
Outdoor Explorers: 25%
Refined Globetrotters: 32%

NUMBER OF VISITS EVER & TIME OF YEAR VISITED CANADA

DESTINATION CANADA

Approximately one-half are repeat visitors. August is the peak month for travel to Canada.





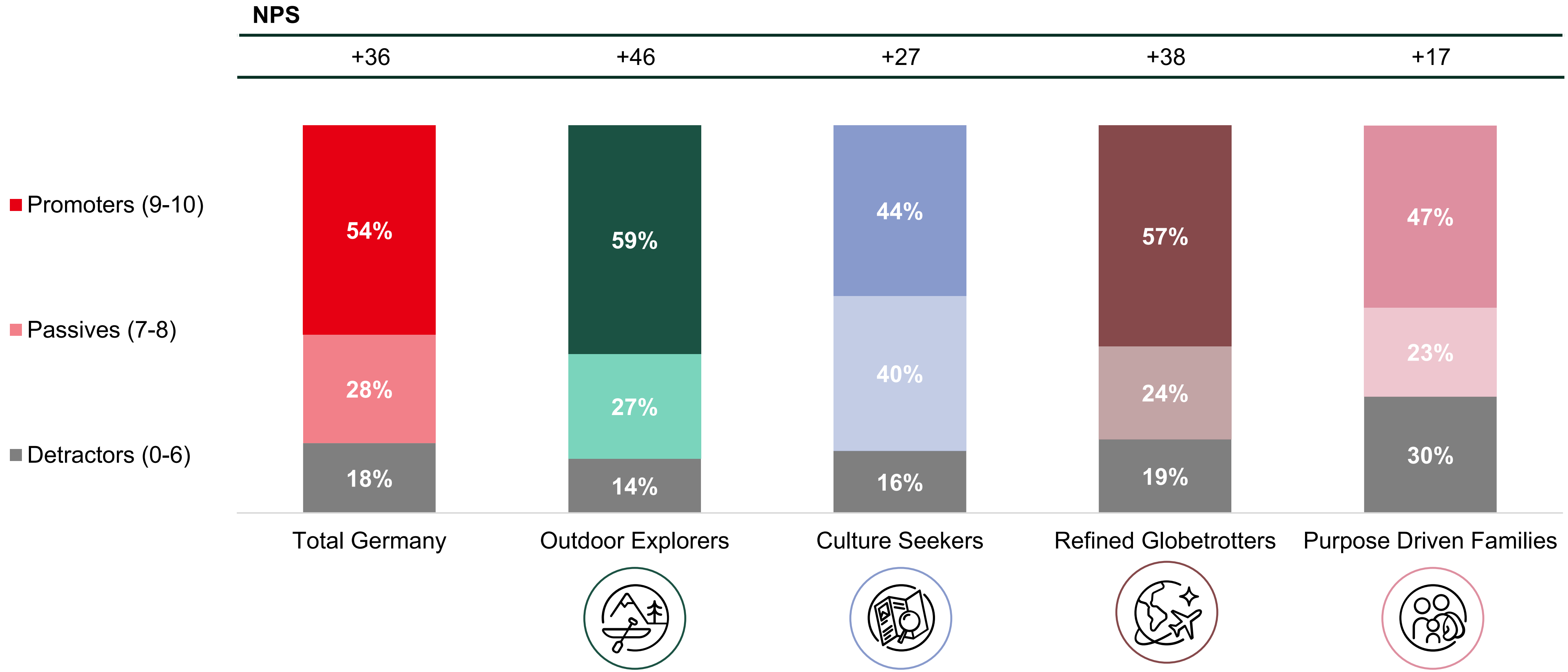
	Total Travellers	Total HEG Travellers
Winter	17%	15%
Spring	39%	40%
Summer	55%	53%
Fall	32%	33%

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Visited Canada (n=400); HEG (n=319)
F19a. Approximately, how many times have you ever been to Canada?
F20. What time of year have you ever visited Canada? Select all that apply.

+ / − = significantly higher/lower result (HEG vs. 2024 Total)

CANADA NET PROMOTER SCORE (NPS): BY SEGMENT

Canada is high among all segments, especially OEs and RGs.

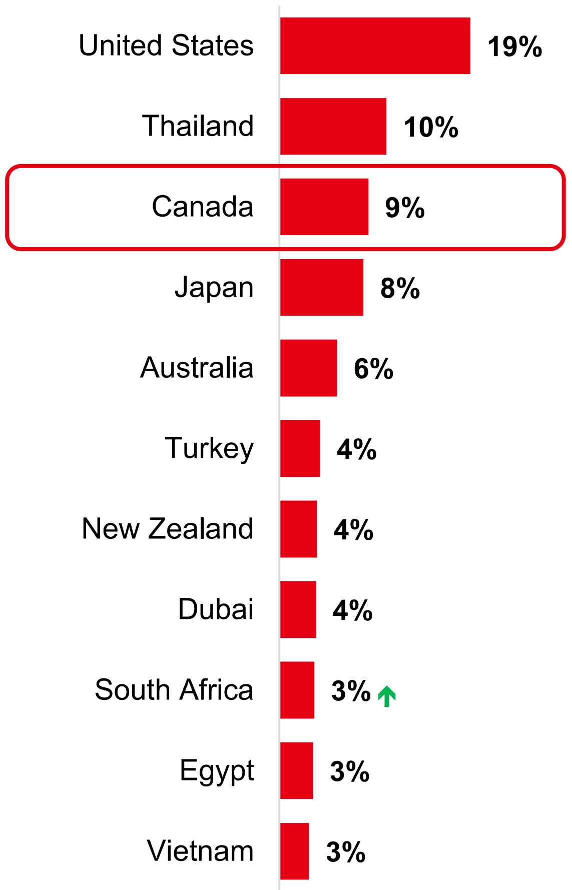


Net Promoter Score (NPS): This measure has an 11pt scale (0-10). The score is calculated by subtracting Detractors (0-6 rating) from Promoters (9-10 rating).
Base: Long-haul pleasure travellers (past 3 years or next 2 years), Visited Canada: Total (n=400); Outdoor Explorers (n=101); Culture Seekers (n=80); Refined Globetrotters (n=94); Purpose Driven Families (n=44)
C8. How likely are you to recommend each of the following holiday destinations to a friend, family member or colleague?

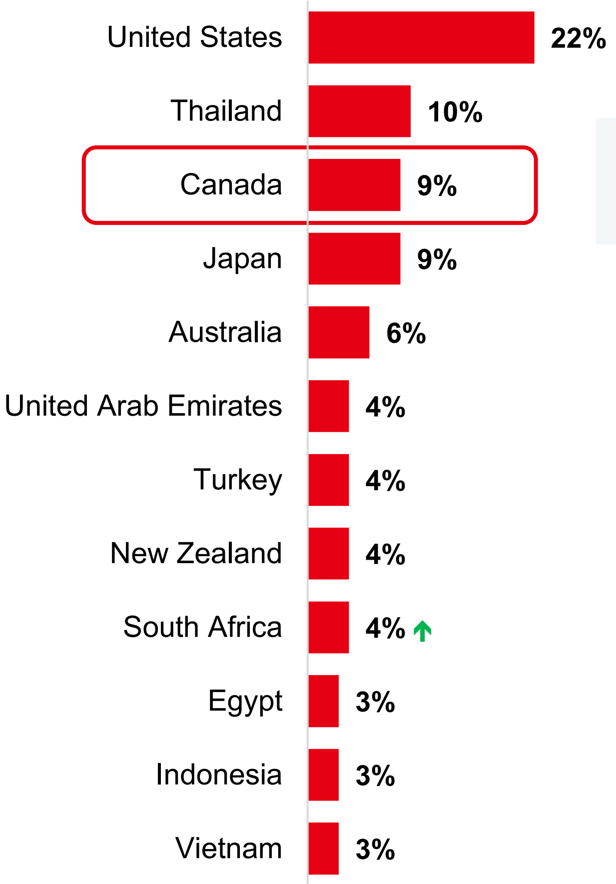
UNAIDED DESTINATION CONSIDERATION (NEXT 2 YEARS)

About one in ten German travellers mention Canada as a serious consideration for travel in the next two years, ranking third behind the United States and Thailand.

Top Destination Brands[1]



Top Destinations[2]



Canada:
Outdoor Explorers: 11%
Refined Globetrotters: 11%

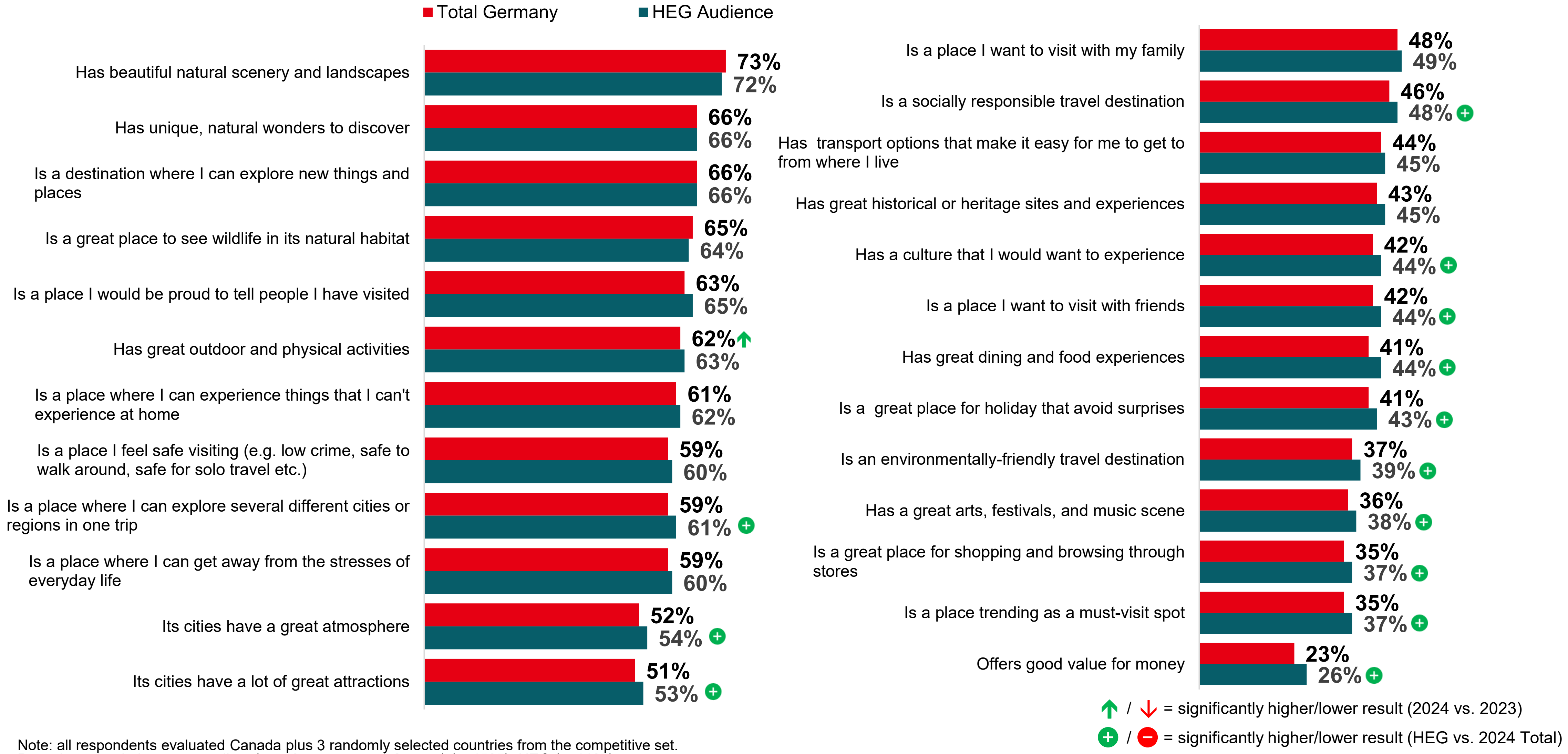
[1] Responses as mentioned by respondents (e.g., percentage who said “Canada” specifically).
[2] Roll-up of brand mentions by country (e.g., percentage who said “Canada” or any destination in Canada).
Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1535)
B1. You mentioned that you 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)

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

IMPRESSIONS OF CANADA AS A HOLIDAY DESTINATION

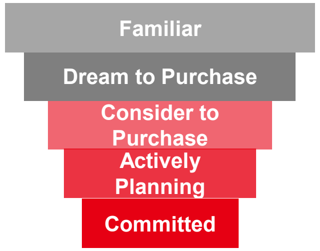
DESTINATION CANADA

Similar to the previous year, German travellers associate Canada with its natural scenery and landscapes as well as its unique, natural wonders. Perceptions of Canada having great outdoor and physical activities increased year over year.



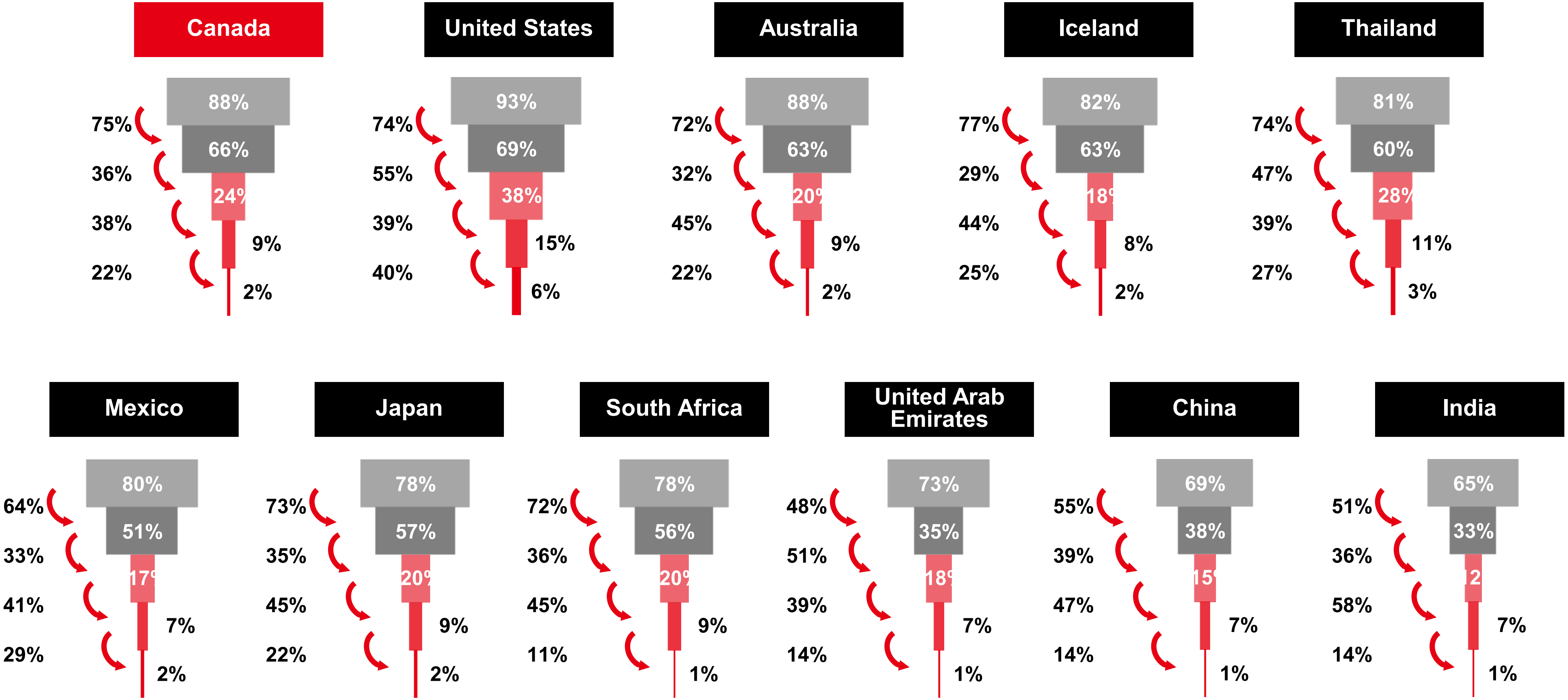
Note: all respondents evaluated Canada plus 3 randomly selected countries from the competitive set.
Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1535); HEG (n=1107)
C6. We are interested in your general impressions about destinations even if you have never been there. Please select all the destinations you think apply to the statement. Select "None of these" if you think none of the destinations apply.

CONSIDERATION FUNNELS: TOTAL GERMANY



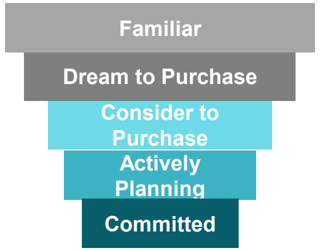
DESTINATION CANADA

Canada is second only to the US in dream to purchase but struggles to convert to consideration (36% vs. 55% for US). Conversion is also lower compared to Thailand (47%) and UAE (51%).



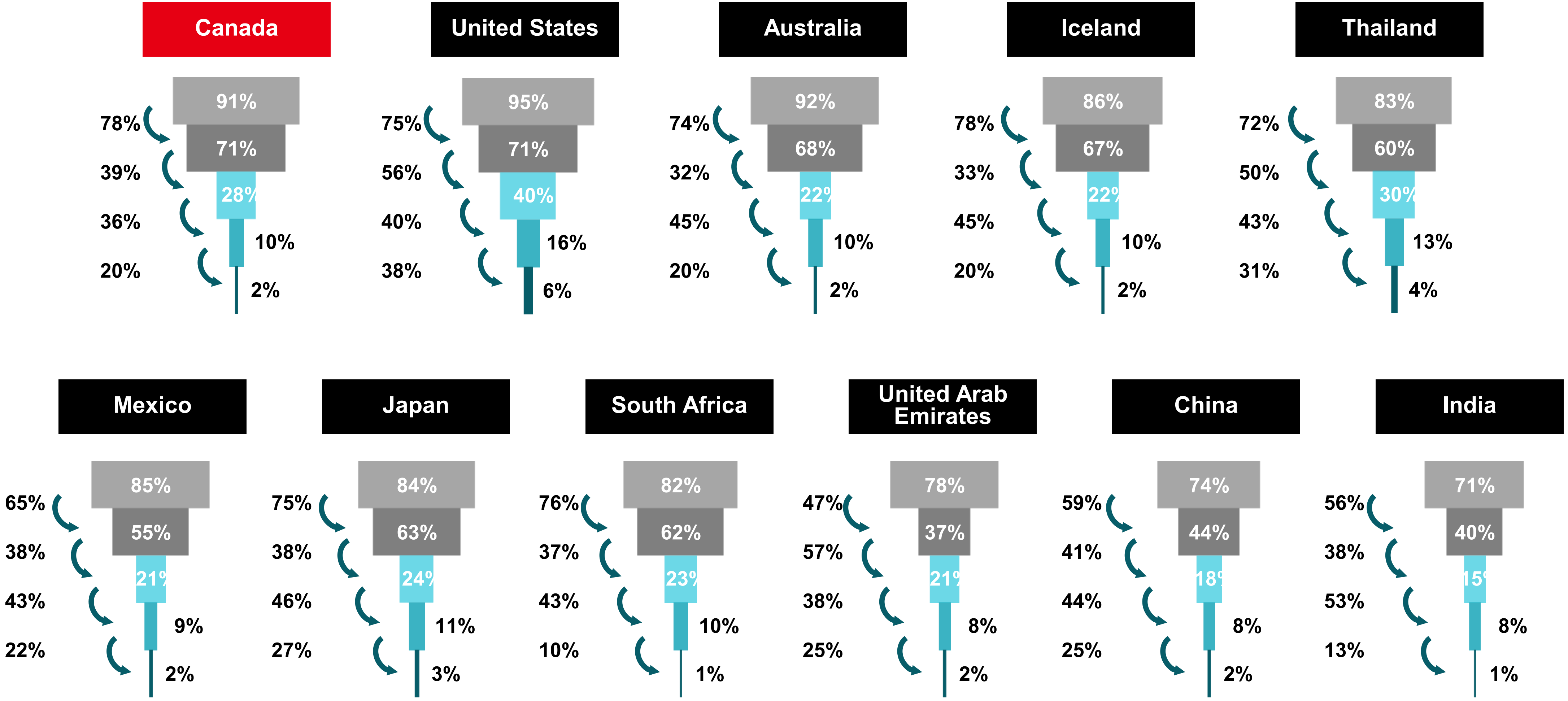
Note: all respondents evaluated Canada plus 3 randomly selected countries from the competitive set.
Base: Long-haul pleasure travellers (past 3 years or next 2 years), Evaluated [DESTINATION]
See notes for question wording and funnel definitions

CONSIDERATION FUNNELS: AMONG HEG TRAVELLERS



DESTINATION CANADA

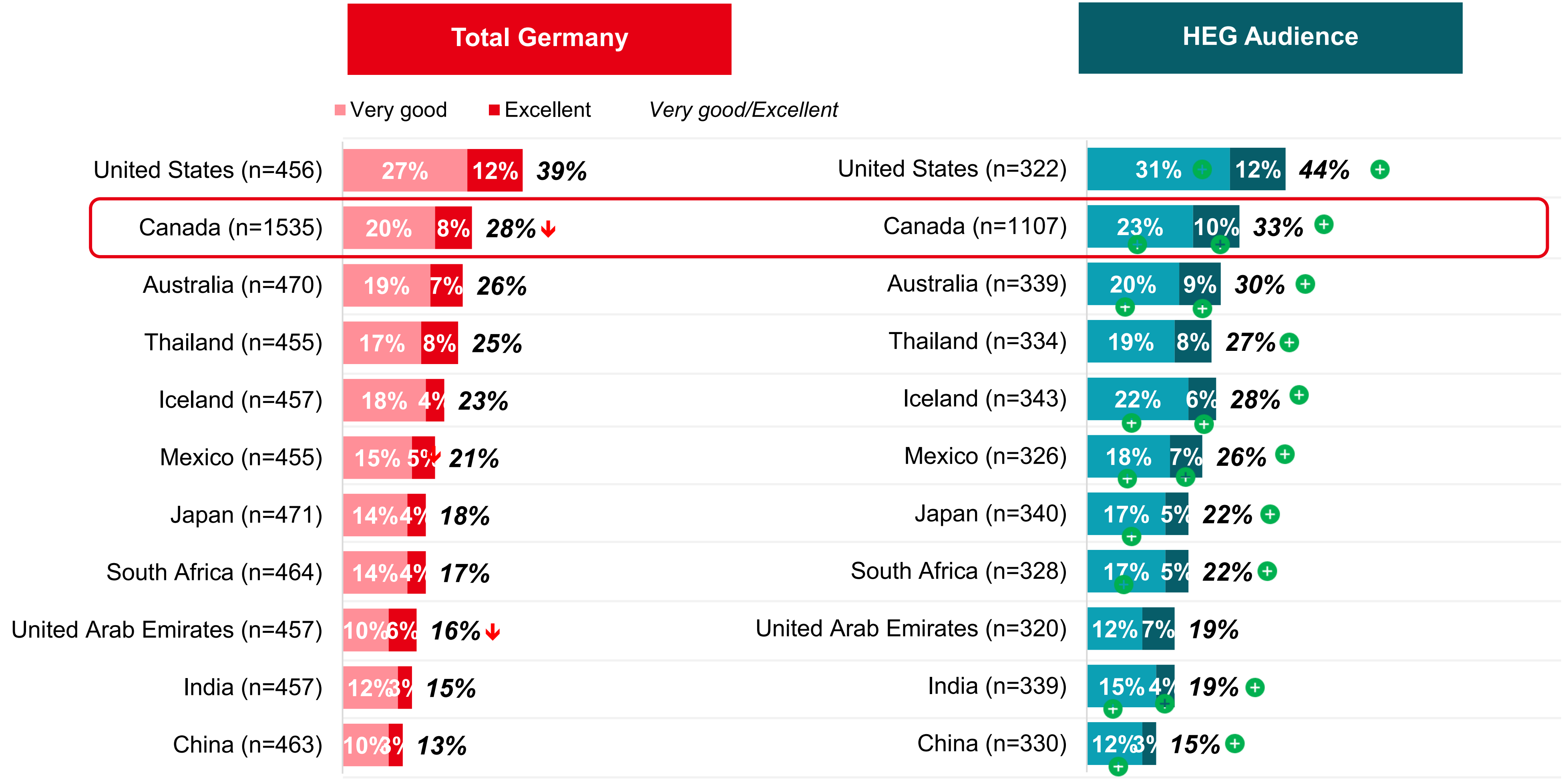
A similar pattern emerges among HEG travellers where conversion to consideration is notably higher for the US, Thailand and UAE.



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), HEG, Evaluated [DESTINATION]
See notes for question wording and funnel definitions

LEVEL OF KNOWLEDGE OF HOLIDAY OPPORTUNITIES

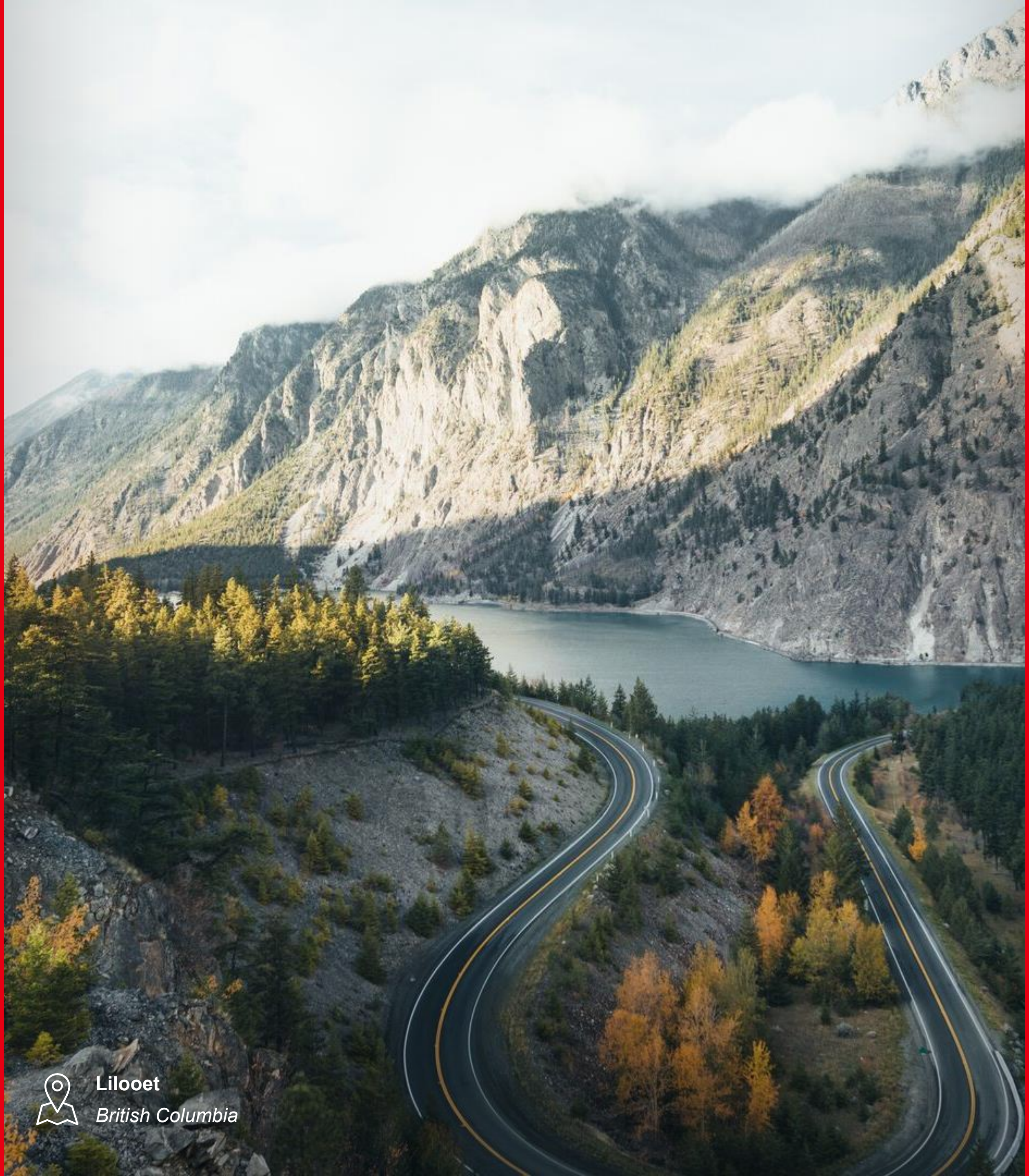
Canada ranks second in knowledge of holiday opportunities among Germans overall, with 28% rating it 'very good' or 'excellent,' though this decreased vs. year ago. Awareness is higher within the HEG audience at 33%.



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

⊕ / ⊖ = significantly higher/lower result (HEG vs. 2024 Total)

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 [DESTINATION]
C5. How would you rate your level of knowledge of holiday opportunities in each of the following destinations? (Select one for each)

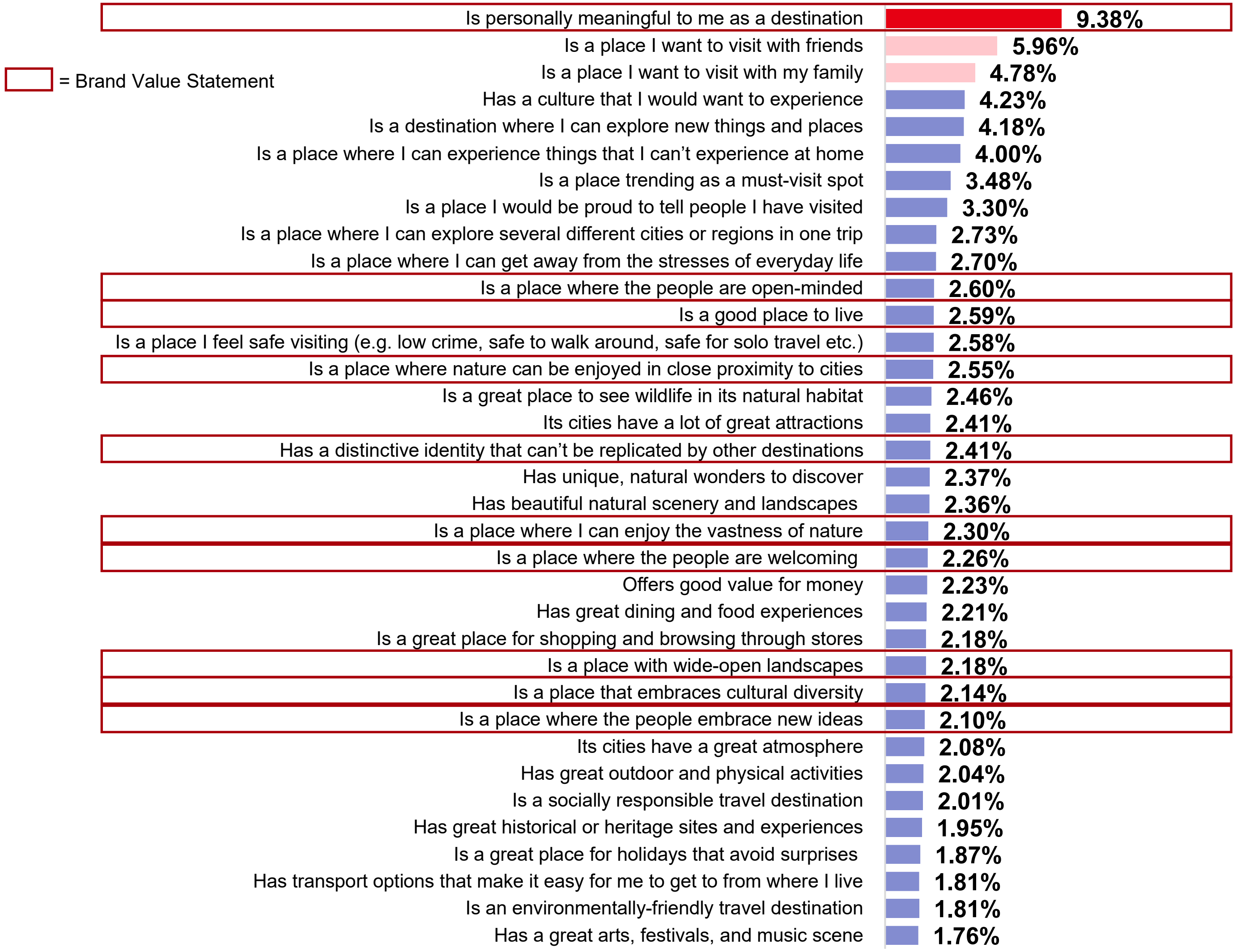


KEY DRIVERS

DESTINATION ATTRIBUTES: DRIVERS ANALYSIS (OUTDOOR EXPLORERS)

DESTINATION CANADA

Among OEs, personal meaning is the top factor in destination consideration. Visiting with friends and family are also influential.



Description

Key drivers analysis (KDA) seeks to identify the strongest predictors of a dependent variable. In this case, we used consideration of a destination (C2) as the dependent variable. The analysis uses a mix of linear and logistic regressions, assessing the simultaneous effect of many independent variables, destination attributes (C6) while controlling for each other.

Interpretation

Attributes with a high percentage level are more likely to impact consideration of a destination. This generally means that destinations that score highly on the top attributes may have higher consideration levels. Each percentage does also indicate the degree of relative impact. An attribute with a score of 5% is twice as impactful on consideration as an attribute with a score of 2.5%.

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), Outdoor Explorers (n=398)
C6. We are interested in your general impressions about destinations even if you have never been there. Please select all the destinations you think apply to the statement.
Select "None of these" if you think none of the destinations apply.

DESTINATION ATTRIBUTES: RELATIVE STRENGTHS & WEAKNESSES (OUTDOOR EXPLORERS)

Canada stands out as a safe destination, offering holidays without surprises, environmentally-friendly and socially responsible experiences, outdoor activities, and opportunities to see wildlife in its natural habitat. There is white space on five attributes.

		Canada	Australia	China	Iceland	India	Japan	Mexico	South Africa	Thailand	United Arab Emirates	United States
	n=	398	128	121	138	111	121	118	124	119	108	107
Higher Order Motivations	Is a place where I can get away from the stresses of everyday life											
	Is a place I would be proud to tell people I have visited											
	Is a destination where I can explore new things and places											
General Needs	Is a place I feel safe visiting (e.g. low crime, safe to walk around, safe for solo travel etc.)											
	Is a place where I can explore several different cities or regions in one trip											
	Offers good value for money											
	Has transport options that make it easy for me to get to from where I live											
Type of Trip	Is a place I want to visit with friends											
	Is a place I want to visit with my family											
	Is a great place for holidays that avoid surprises											
	Is a place where I can experience things that I can't experience at home											
	Is an environmentally-friendly travel destination											
	Is a socially responsible travel destination											
	Is a place trending as a must-visit spot											
To-Do	Is a great place for shopping and browsing through stores											
	Its cities have a lot of great attractions											
	Has great outdoor and physical activities											
	Has great dining and food experiences											
	Has a great arts, festivals, and music scene											
To-See	Its cities have a great atmosphere											
	Has beautiful natural scenery and landscapes											
	Is a great place to see wildlife in its natural habitat											
	Has great historical or heritage sites and experiences											
	Has a culture that I would want to experience											
	Has unique, natural wonders to discover											

No destination has a strength for this statement

Strength | Weakness

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), Outdoor Explorers, Evaluated [DESTINATION]
C6. We are interested in your general impressions about destinations even if you have never been there. Please select all the destinations you think apply to the statement. Select "None of these" if you think none of the destinations apply.

BRAND VALUE STATEMENTS (OUTDOOR EXPLORERS)

In terms of value statements, Canada over-indexes as a place nature can be enjoyed in close proximity to cities, a good place to live and a place where the vastness of nature can be enjoyed. There is white space on the key driver is personally meaningful to me as a destination.

	Canada	Australia	China	Iceland	India	Japan	Mexico	South Africa	Thailand	United Arab Emirates	United States
n=	398	128	121	138	111	121	118	124	119	108	107
Is a place with wide-open landscapes				Strength		Weakness			Weakness		
Is a place where nature can be enjoyed in close proximity to cities	Strength		Weakness	Strength		Weakness		Strength			
Is a place that embraces cultural diversity	Weakness		Strength	Weakness	Strength		Strength		Strength		
Is a place where the people are welcoming			Weakness	Strength					Strength		Weakness
Is a place where the people are open-minded			Weakness							Weakness	
Is a place where the people embrace new ideas		Strength	Weakness				Weakness				Strength
Is a good place to live	Strength	Strength	Weakness	Strength	Weakness		Weakness	Weakness			
Has a distinctive identity that can't be replicated by other destinations	Weakness										
Is personally meaningful to me as a destination					Weakness						
Is a place where I can enjoy the vastness of nature	Strength	Strength		Strength	Weakness	Weakness		Strength	Weakness	Weakness	

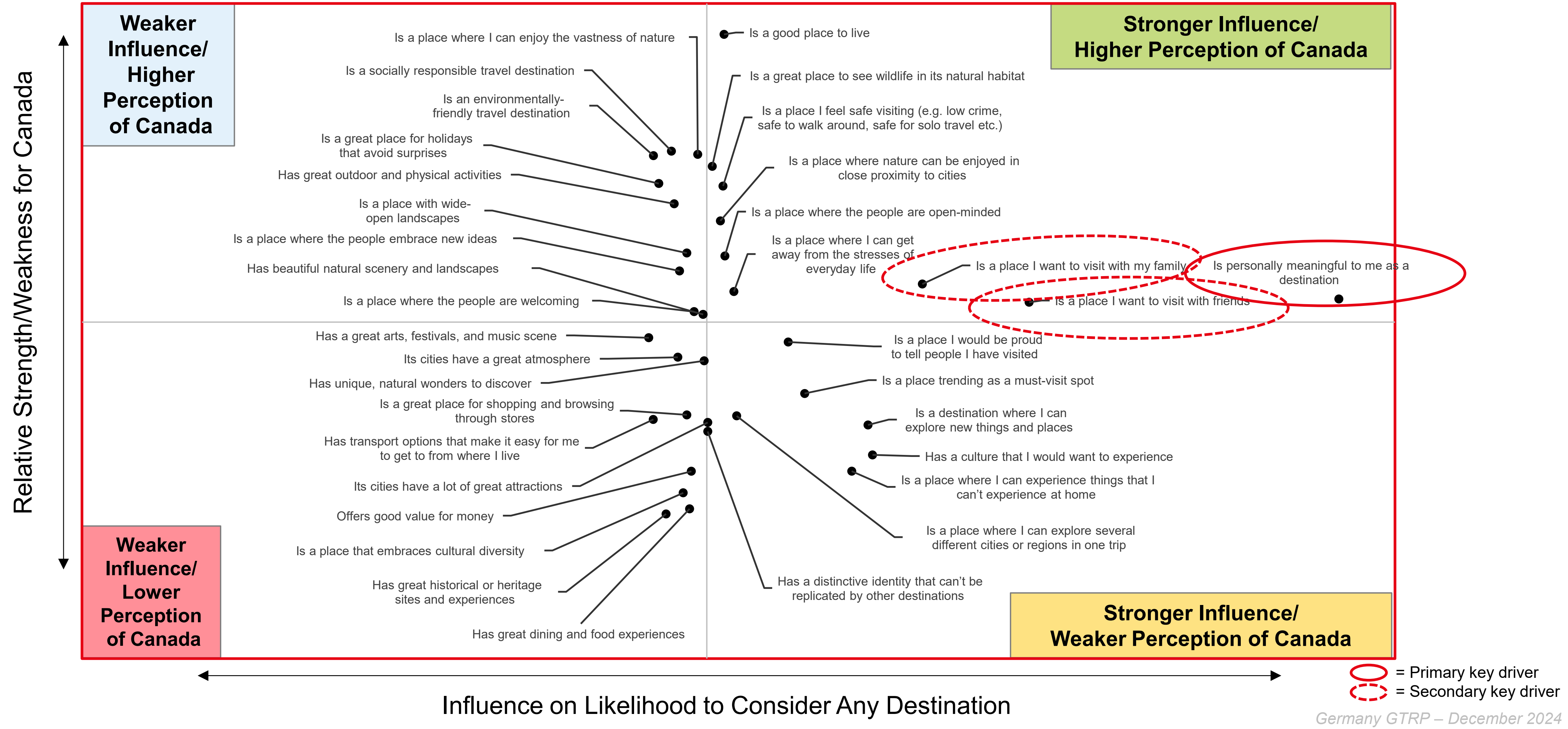
No destination has a strength for this statement

Strength | Weakness

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), Outdoor Explorers, Evaluated [DESTINATION]
C6. We are interested in your general impressions about destinations even if you have never been there. Please select all the destinations you think apply to the statement. Select "None of these" if you think none of the destinations apply.

CANADA STRENGTHS & OPPORTUNITIES (OUTDOOR EXPLORERS)

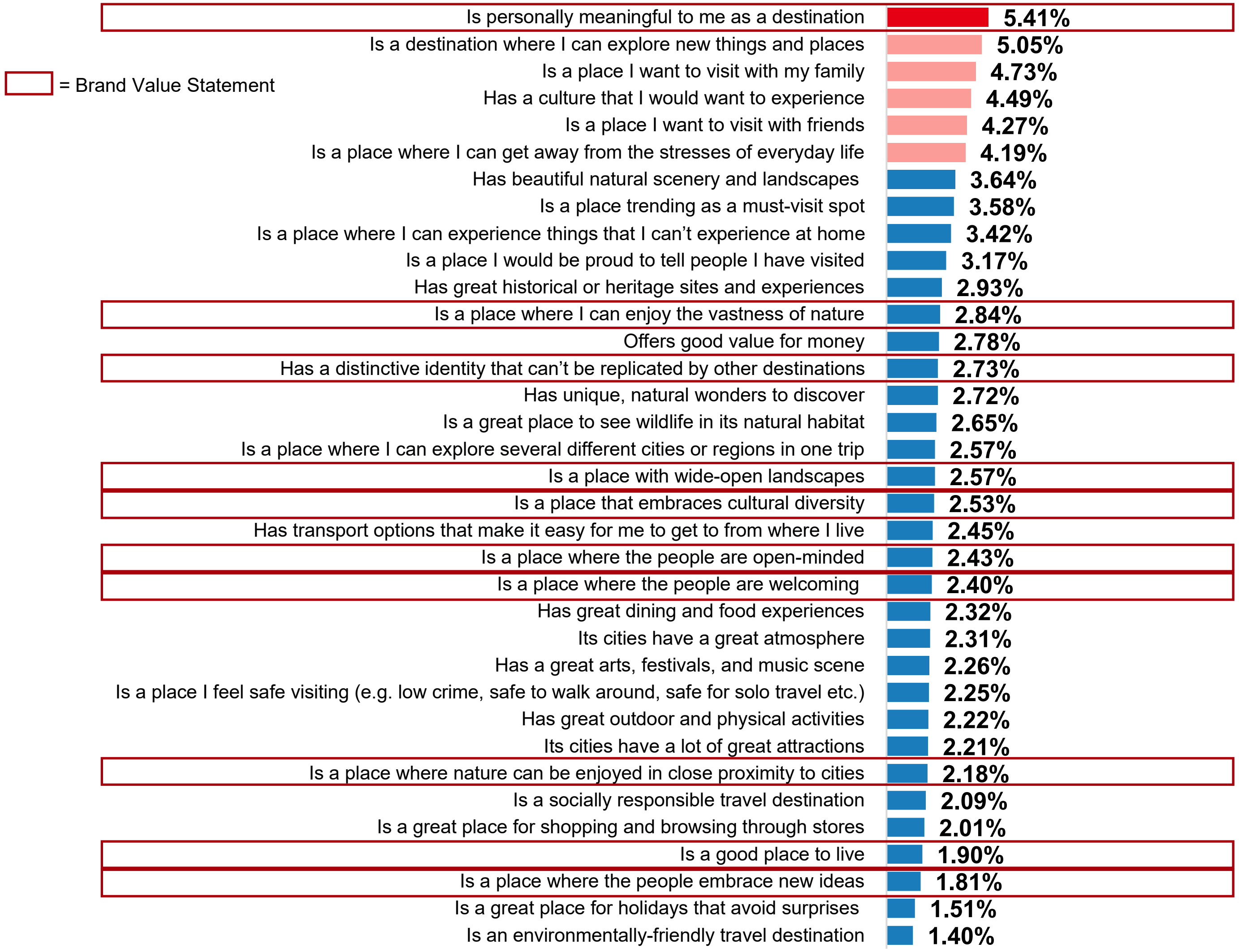
Canada's key strengths align with the highly influential attributes for OEs, including personal meaning, and wanting to visit with family and friends. However, there's an opportunity to strengthen these perceptions as well those more moderate drivers such as being a destination where I can explore new things, culture I want to experience and place I can experience things I can't experience at home.



DESTINATION ATTRIBUTES: DRIVERS ANALYSIS (REFINED GLOBETROTTERS)

DESTINATION CANADA

Among RGs, personal meaning is important, but the gap is smaller. Secondary drivers include the ability to explore new things and places, a place I want to visit with family/friends, culture I would want to experience and a place to escape everyday stresses.



Description

Key drivers analysis (KDA) seeks to identify the strongest predictors of a dependent variable. In this case, we used consideration of a destination (C2) as the dependent variable. The analysis uses a mix of linear and logistic regressions, assessing the simultaneous effect of many independent variables, destination attributes (C6) while controlling for each other.

Interpretation

Attributes with a high percentage level are more likely to impact consideration of a destination. This generally means that destinations that score highly on the top attributes may have higher consideration levels. Each percentage does also indicate the degree of relative impact. An attribute with a score of 5% is twice as impactful on consideration as an attribute with a score of 2.5%.

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), Refined Globetrotters (n=294)
C6. We are interested in your general impressions about destinations even if you have never been there. Please select all the destinations you think apply to the statement. Select "None of these" if you think none of the destinations apply.

DESTINATION ATTRIBUTES: RELATIVE STRENGTHS & WEAKNESSES (REFINED GLOBETROTTERS)

DESTINATION CANADA

Canada is viewed by RGs as an environmentally friendly, socially responsible location with great outdoor/physical activities as well as a great place to see wildlife in its natural habitat.

		Canada	Australia	China	Iceland	India	Japan	Mexico	South Africa	Thailand	United Arab Emirates	United States
	n=	294	88	87	83	100	100	77	77	90	90	90
Higher Order Motivations	Is a place where I can get away from the stresses of everyday life			Weakness						Strength		
Higher Order Motivations	Is a place I would be proud to tell people I have visited											
Higher Order Motivations	Is a destination where I can explore new things and places			Strength								
General Needs	Is a place I feel safe visiting (e.g. low crime, safe to walk around, safe for solo travel etc.)				Strength	Weakness	Strength	Weakness	Weakness		Strength	Weakness
General Needs	Is a place where I can explore several different cities or regions in one trip			Strength								
General Needs	Offers good value for money	Weakness	Weakness		Weakness			Strength		Strength		
General Needs	Has transport options that make it easy for me to get to from where I live		Weakness								Strength	
Type of Trip	Is a place I want to visit with friends										Strength	
Type of Trip	Is a place I want to visit with my family			Weakness							Strength	
Type of Trip	Is a great place for holidays that avoid surprises			Weakness							Strength	
Type of Trip	Is a place where I can experience things that I can't experience at home	Weakness										
Type of Trip	Is an environmentally-friendly travel destination	Strength		Weakness	Strength				Weakness	Weakness		Weakness
Type of Trip	Is a socially responsible travel destination	Strength		Weakness	Strength	Weakness			Weakness			Weakness
Type of Trip	Is a place trending as a must-visit spot	Weakness									Strength	
To-Do	Is a great place for shopping and browsing through stores	Weakness		Strength	Weakness	Weakness			Weakness		Strength	Strength
To-Do	Its cities have a lot of great attractions			Strength	Weakness	Strength	Strength		Weakness			
To-Do	Has great outdoor and physical activities	Strength		Weakness		Weakness	Weakness					Strength
To-Do	Has great dining and food experiences	Weakness			Weakness		Strength			Strength		
To-Do	Has a great arts, festivals, and music scene			Weakness	Weakness							Strength
To-See	Its cities have a great atmosphere				Weakness		Strength		Weakness		Strength	
To-See	Has beautiful natural scenery and landscapes								Strength		Weakness	
To-See	Is a great place to see wildlife in its natural habitat	Strength	Strength	Weakness			Weakness		Strength	Weakness	Weakness	
To-See	Has great historical or heritage sites and experiences	Weakness	Weakness	Strength	Weakness	Strength	Strength	Strength			Weakness	
To-See	Has a culture that I would want to experience		Weakness			Strength	Strength					Weakness
To-See	Has unique, natural wonders to discover				Strength						Weakness	

No destination has a strength for this statement

Strength | Weakness

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), Refined Globetrotters, Evaluated [DESTINATION]
C6. We are interested in your general impressions about destinations even if you have never been there. Please select all the destinations you think apply to the statement. Select "None of these" if you think none of the destinations apply.

BRAND VALUE STATEMENTS (REFINED GLOBETROTTERS)

There is an opportunity for Canada to carve out the perception that it is a place where people embrace new ideas.

	Canada	Australia	China	Iceland	India	Japan	Mexico	South Africa	Thailand	United Arab Emirates	United States
n=	294	88	87	83	100	100	77	77	90	90	90
Is a place with wide-open landscapes		Strength				Weakness		Strength	Weakness	Weakness	
Is a place where nature can be enjoyed in close proximity to cities	Strength			Strength	Weakness	Weakness		Strength		Weakness	
Is a place that embraces cultural diversity	Weakness		Strength	Weakness	Strength					Weakness	
Is a place where the people are welcoming									Strength	Weakness	
Is a place where the people are open-minded			Weakness			Weakness			Strength	Weakness	
Is a place where the people embrace new ideas											
Is a good place to live	Strength	Strength			Weakness	Weakness	Weakness	Weakness			
Has a distinctive identity that can't be replicated by other destinations						Strength					
Is personally meaningful to me as a destination					Weakness						Strength
Is a place where I can enjoy the vastness of nature	Strength	Strength		Strength		Weakness	Weakness	Strength	Weakness	Weakness	

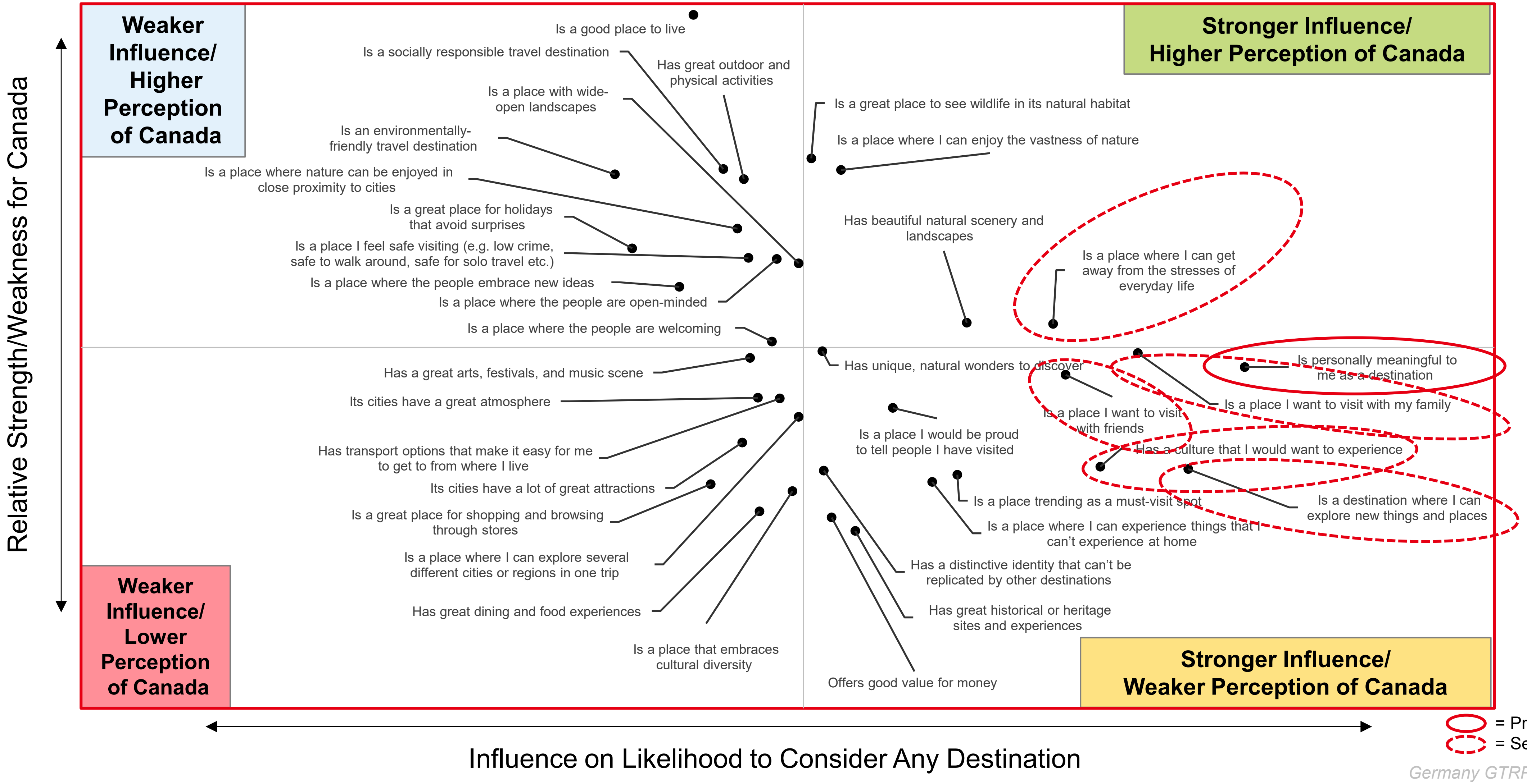
No destination has a strength for this statement

Strength | **Weakness**

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), Refined Globetrotters, Evaluated [DESTINATION]
C6. We are interested in your general impressions about destinations even if you have never been there. Please select all the destinations you think apply to the statement. Select "None of these" if you think none of the destinations apply.

CANADA STRENGTHS & OPPORTUNITIES (REFINED GLOBETROTTERS)

While Canada has a more distinct profile on less influential drivers of RG consideration, the destination would benefit by bolstering perceptions related to personal meaning, place I want to visit with friends/family, culture I want to experience and destination where I can explore new things/places.



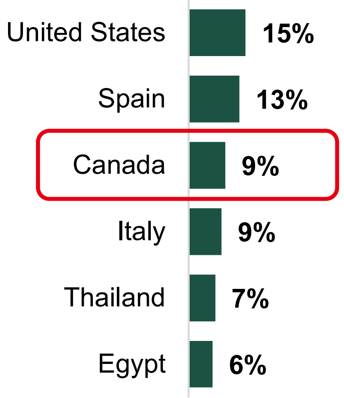
= Primary key driver
= Secondary key driver

SEASONAL TRAVEL

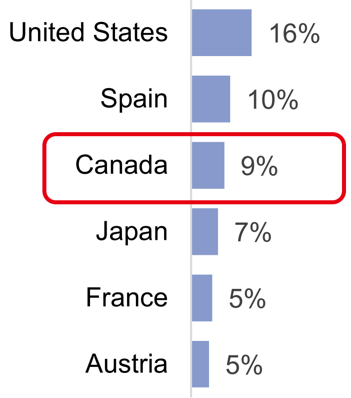
TOP UNAIDED FALL DESTINATIONS: BY SEGMENTS

The US and Spain are the top two mentions for Fall travel. Canada ranks higher among OEs and CSs than RGs and PDFs.

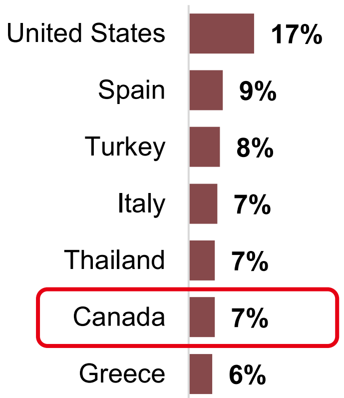
Outdoor Explorers
(n=190)



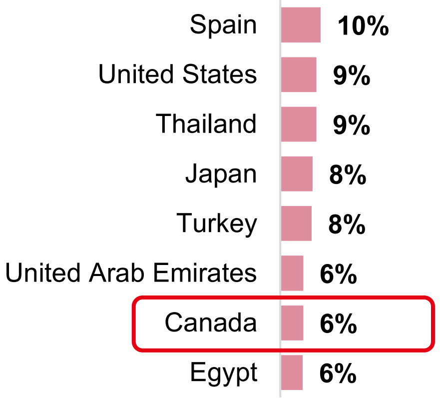
Culture Seekers
(n=128)



Refined Globetrotters
(n=148)



Purpose Driven Families
(n=85)



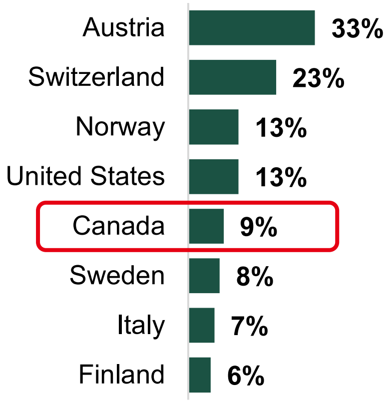
Note: respondents were asked either about winter travel (B2/D2/E13) or autumn travel (B3/D3/E14)
Base: Long-haul pleasure travellers (past 3 years or next 2 years)
B3. What destinations come to mind when thinking about travel to experience the **autumn season**? (Please list up to 3 destinations. You 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.

TOP UNAIDED WINTER DESTINATIONS: BY SEGMENTS

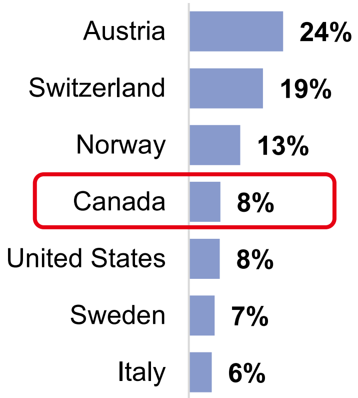
DESTINATION CANADA

Canada is competing with European destinations such as Austria, Switzerland, Norway and Finland for share of mind as it relates to Winter travel. Among RGs, the list of European destinations is even longer with Canada falling to the bottom.

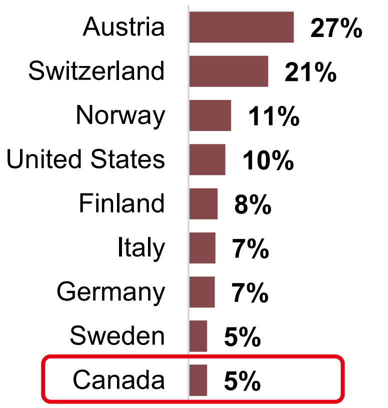
Outdoor Explorers
(n=208)



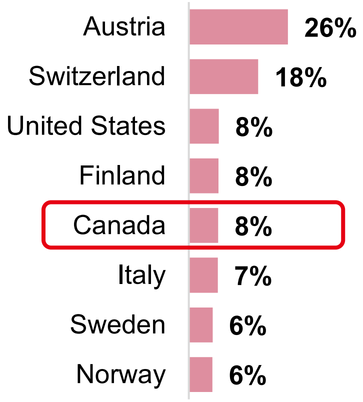
Culture Seekers
(n=136)



Refined Globetrotters
(n=146)



Purpose Driven Families
(n=66)



Note: respondents were asked either about winter travel (B2/D2/E13) or autumn travel (B3/D3/E14)
Base: Long-haul pleasure travellers (past 3 years or next 2 years)
B2. What destinations come to mind when thinking about travel to experience the **winter season**? (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.

SEASONAL CONSIDERATION BY DESTINATION

Consideration for both Fall and Winter travel to Canada dropped vs. year ago. HEGs have higher consideration for all seasons except Summer.

Total Germany	Winter (Dec, Jan, Feb)	Spring (Mar, Apr, May)	Summer (Jun, Jul, Aug)	Fall (Sept, Oct, Nov)
Australia (n=297)	43%	39%	24%	37%
Canada (n=1005)	19% ↓	38%	55%	46% ↓
China (n=173)	21%	44%	35%	35%
Iceland (n=286)	23%	38%	57%	36%
India (n=151)	31%	40%	30%	38%
Japan (n=266)	20%	48%	37%	39%
Mexico (n=231)	38%	44%	27%	39%
South Africa (n=261)	41%	48%	27%	41%
Thailand (n=272)	43%	49%	25%	38%
United Arab Emirates (n=159)	43%	47%	20%	42%
United States (n=313)	28%	45%	50%	46%

HEG Audience	Winter (Dec, Jan, Feb)	Spring (Mar, Apr, May)	Summer (Jun, Jul, Aug)	Fall (Sept, Oct, Nov)
Australia (n=232)	44%	38%	27%	39%
Canada (n=784)	20% ⊕	39% ⊕	55%	49% ⊕
China (n=145)	23%	44%	34%	36%
Iceland (n=230)	25%	40%	59%	38%
India (n=134)	31%	40%	29%	38%
Japan (n=214)	22%	48%	37%	39%
Mexico (n=181)	38%	47%	30%	40%
South Africa (n=203)	42%	49%	27%	43%
Thailand (n=202)	46%	50%	26%	37%
United Arab Emirates (n=118)	44%	47%	23%	36% ⊖
United States (n=230)	30%	44%	52%	49%

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

⊕ / ⊖ = significantly higher/lower result (HEG vs. 2024 Total)

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), Those in the dream to purchase stages of the path to purchase for [DESTINATION]
C7. For each of the following destinations, during which months would you consider taking a holiday trip in the next 2 years?

FALL/WINTER CONVERSION – TOTAL GERMANY

For both Winter and Fall, there are similar conversion rates from those that typically travel during that season to those interested in taking a trip during a destination's Fall (64%) or Winter (60%) season. Canada has just a slightly stronger potential to convert those who are extremely interested in travel during a destinations Fall season. However, the net result is 6.9M potential for the Fall season which is more than double the Winter estimate.

Fall

61.7%
Demand During Fall **Months**
(any destination)

14,024,000

64%

39.6%
Extremely Interested in Visiting a Destination During its Fall **Season**
(any destination)

9,000,000

76%

46.2% ↓
Next 2 Year Potential Target Market **for CANADA During Fall Season**

6,871,500

Winter

29.2%
Demand During Winter **Months**
(any destination)

6,637,000

60%

17.7%
Extremely Interested in Visiting a Destination During its Winter **Season**
(any destination)

4,010,500

69%

18.6% ↓
Next 2 Year Potential Target Market **for CANADA During Winter Season**

2,761,000

Base: Long-haul pleasure travellers (past 3 years or next 2 years)
D1. In general, what time of year do you typically like to take holiday trips? Select all that apply Total (n=1535)
D3. In general, how interested are you in taking a holiday trip to a destination during **its autumn season**? Total (n=772)
D2. In general, how interested are you in taking a holiday trip to a destination during **its winter season**? Total (n=763)
C7. For each of the following destinations, during which months would you consider taking long-haul trip in the next two years? Total (n=1005)

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

FALL/WINTER CONVERSION – HEGS

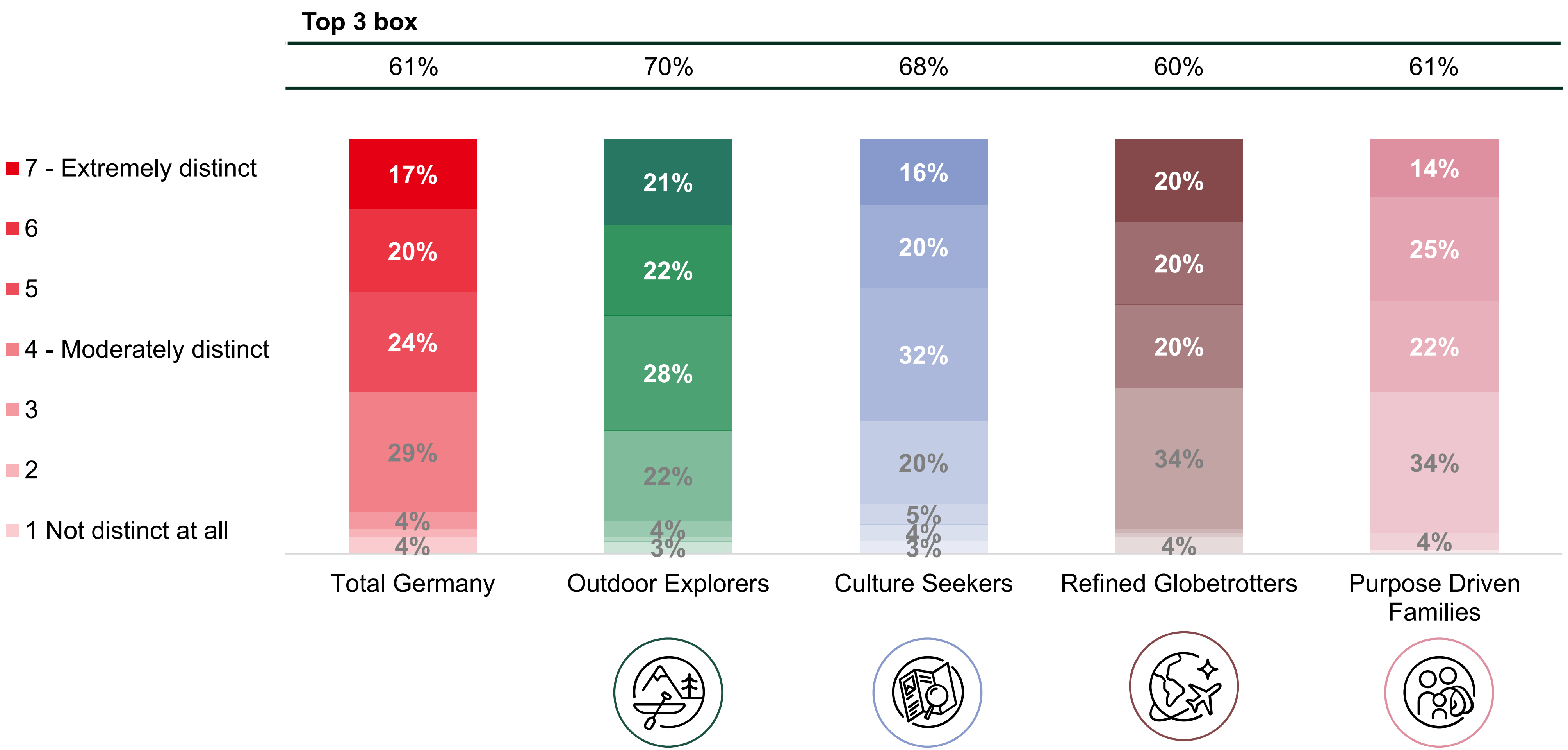
There is a similar pattern among HEGs. Conversion rates are similar, but the net potential for Fall is much greater.

	Fall			Winter	
60.8% Demand During Fall **Months** (any destination)	**9,968,000**		**31.0%** Demand During Winter **Months** (any destination)	**5,082,500**	
		69%			**65%**
41.9% Extremely Interested in Visiting a Destination During its Fall **Season** (any destination)	**6,870,500**		**20.2%** Extremely Interested in Visiting a Destination During its Winter **Season** (any destination)	**3,320,500**	
		82%			**70%**
48.6% Next 2 Year Potential Target Market **for CANADA During Fall Season**	**5,643,500**		**20.0%** Next 2 Year Potential Target Market **for CANADA During Winter Season**	**2,326,500**	

Base: Long-haul pleasure travellers (past 3 years or next 2 years), HEGs
D1. In general, what time of year do you typically like to take holiday trips? Select all that apply (n=1107)
D3. In general, how interested are you in taking a holiday trip to a destination during **its autumn season**? (n=551)
D2. In general, how interested are you in taking a holiday trip to a destination during **its winter season**? (n=556)
C7. For each of the following destinations, during which months would you consider taking long-haul trip in the next two years? (n=784)

UNIQUENESS OF CANADA AS FALL DESTINATION: BY SEGMENTS

Six in ten view Canada as a distinct Fall destination and this is fairly consistent across segments.



Note: respondents were asked either about winter travel (B2/D2/E13) or autumn travel (B3/D3/E14)
Base: Long-haul pleasure travellers (past 3 years or next 2 years): Total (n=772); Outdoor Explorers (n=190); Culture Seekers (n=128); Refined Globetrotters (n=148); Purpose Driven Families (n=85)
E14. How distinct is Canada as an autumn travel destination?

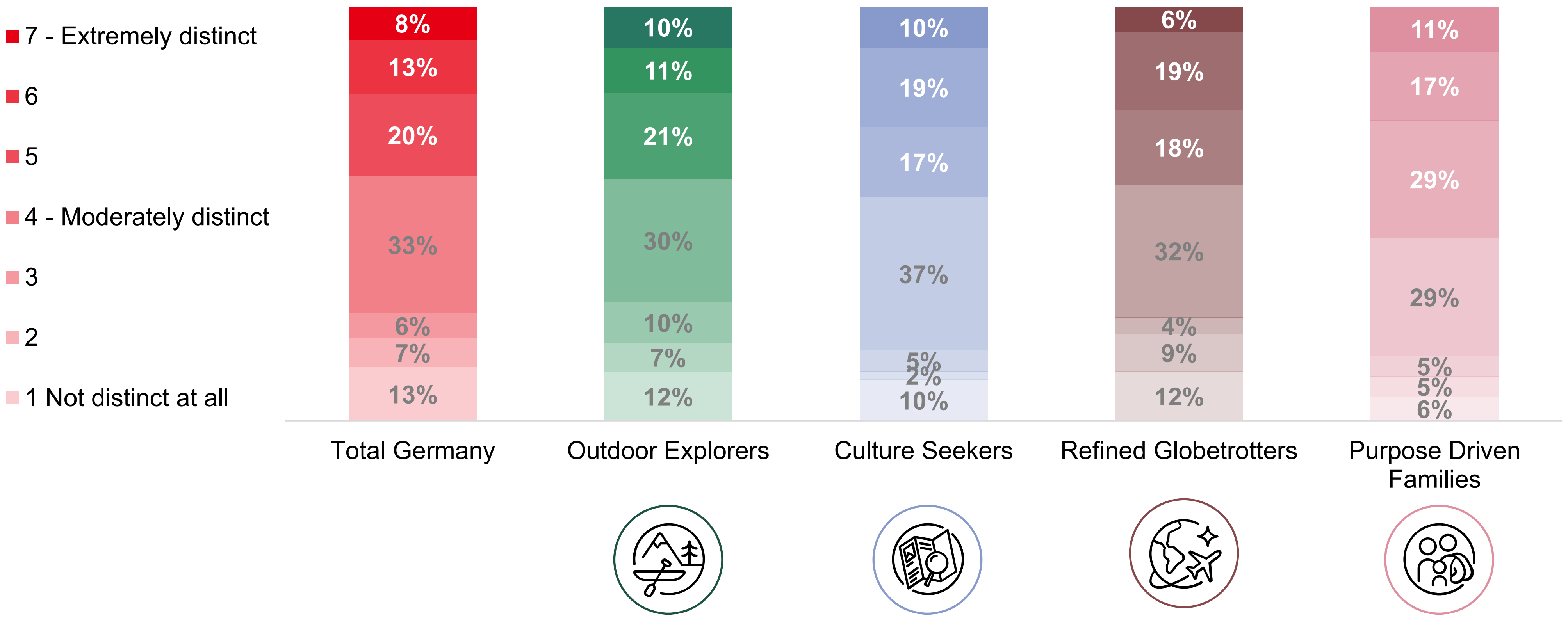
UNIQUENESS OF CANADA AS WINTER DESTINATION: BY SEGMENTS

DESTINATION CANADA

One in four total German travellers view Canada as a distinct Winter destination, which is lower than Canada's distinctness as a Fall destination. At 56%, PDFs have the strongest perception of Canada as being distinct.

Top 3 box

Total Germany	Outdoor Explorers	Culture Seekers	Refined Globetrotters	Purpose Driven Families
41%	42%	46%	43%	56%



Note: respondents were asked either about winter travel (B2/D2/E13) or autumn travel (B3/D3/E14)
Base: Long-haul pleasure travellers (past 3 years or next 2 years): Total (n=763); Outdoor Explorers (n=208); Culture Seekers (n=136); Refined Globetrotters (n=146); Purpose Driven Families (n=66)
E13. How distinct is Canada as a winter travel destination?

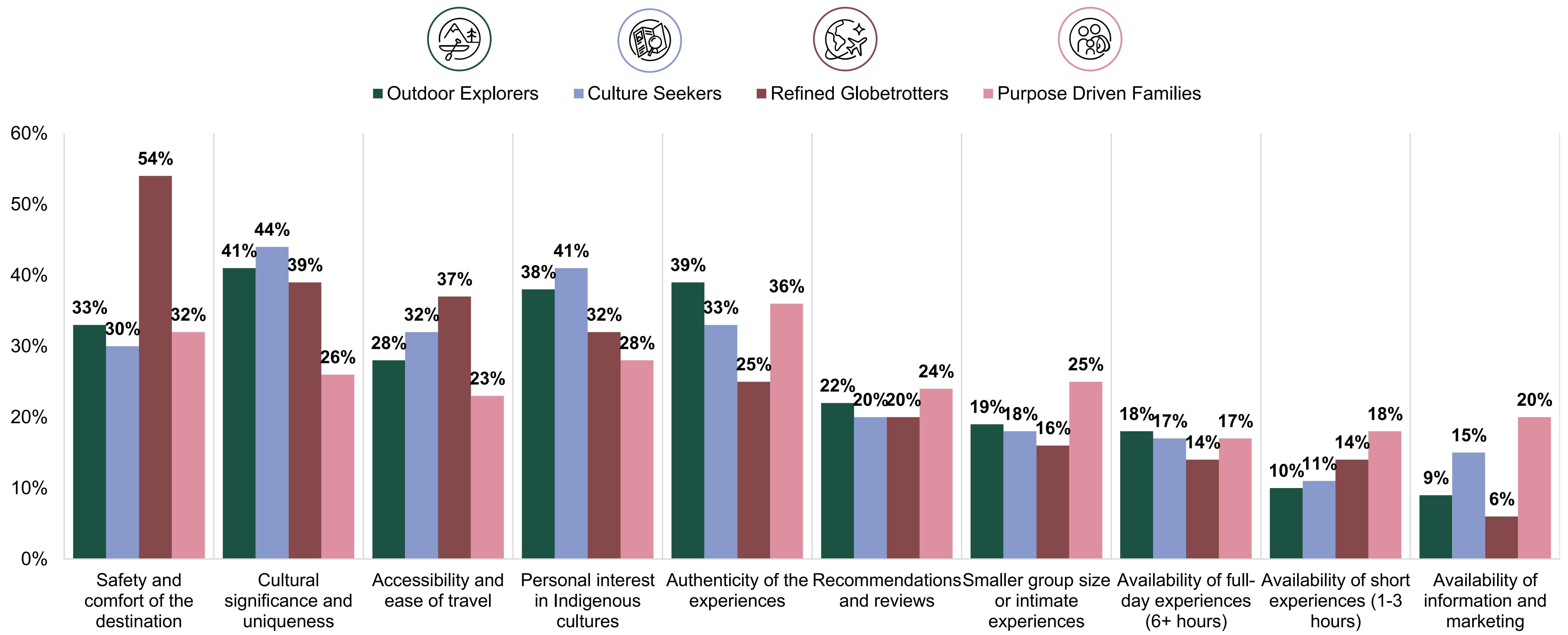
DESTINATION CANADA

INDIGENOUS TRAVEL

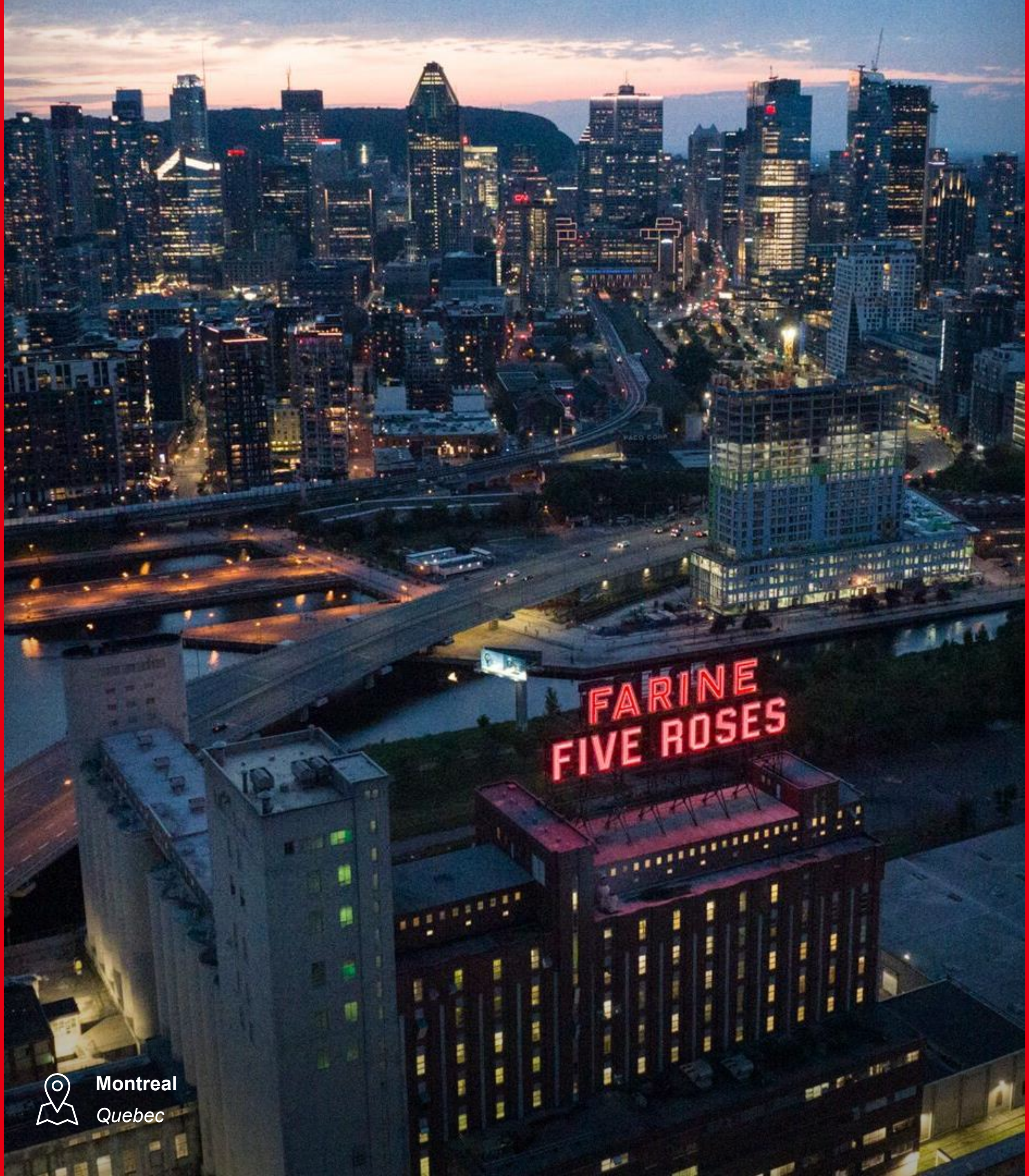
FACTORS TO DRIVE INTEREST IN INDIGENOUS CULTURAL EXPERIENCES: BY SEGMENTS

DESTINATION CANADA

Safety/comfort of the destination is a key driver of interest for indigenous experiences, especially among RGs.



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): Outdoor Explorers (n=186); Culture Seekers (n=139); Refined Globetrotters (n=158); Purpose Driven Families (n=78)
C11. What factors would increase your interest in participating in Indigenous cultural experiences and tourism activities in a destination? (Select up to 3)

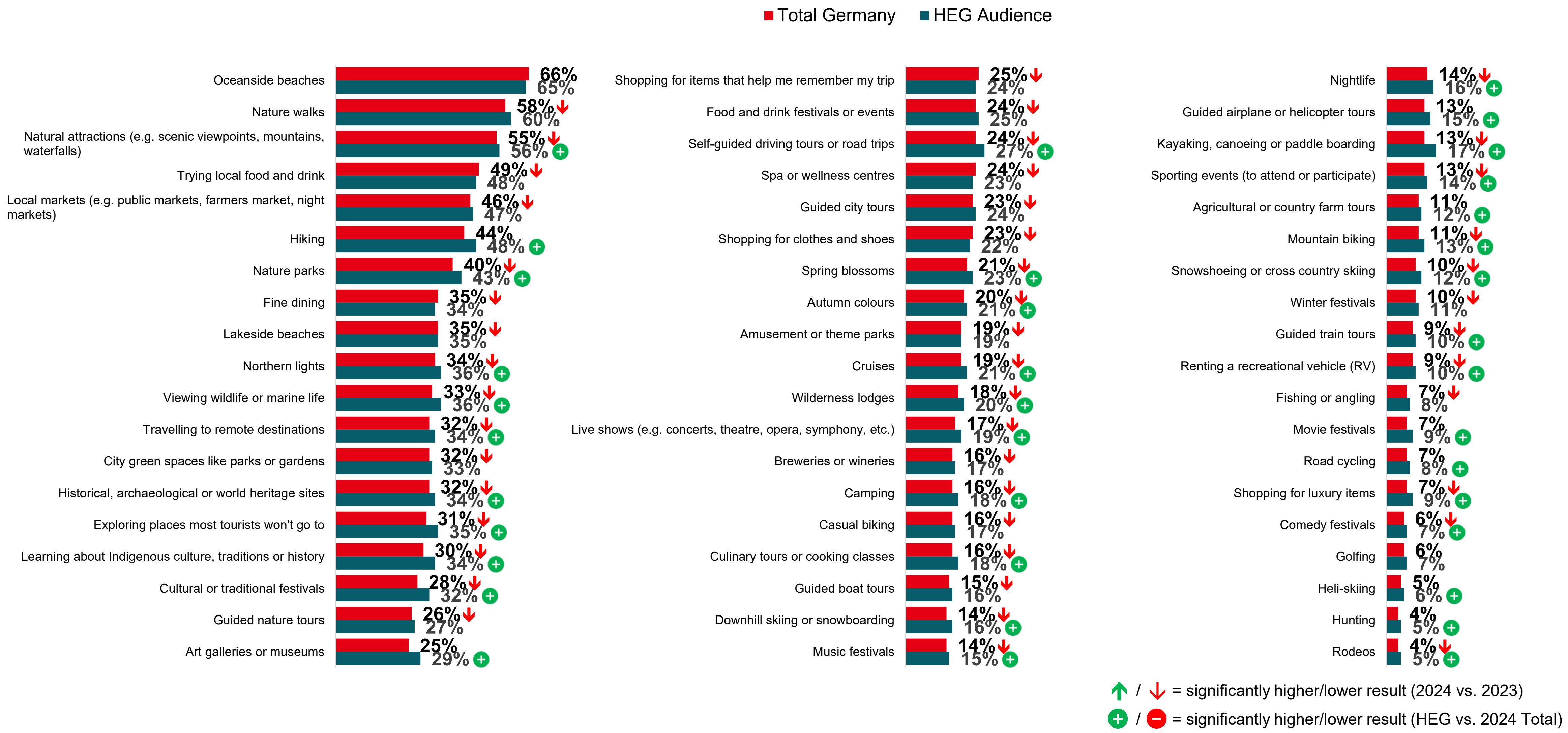


DESTINATION CANADA

TRAVEL BEHAVIOURS

GENERAL ACTIVITIES INTERESTED IN

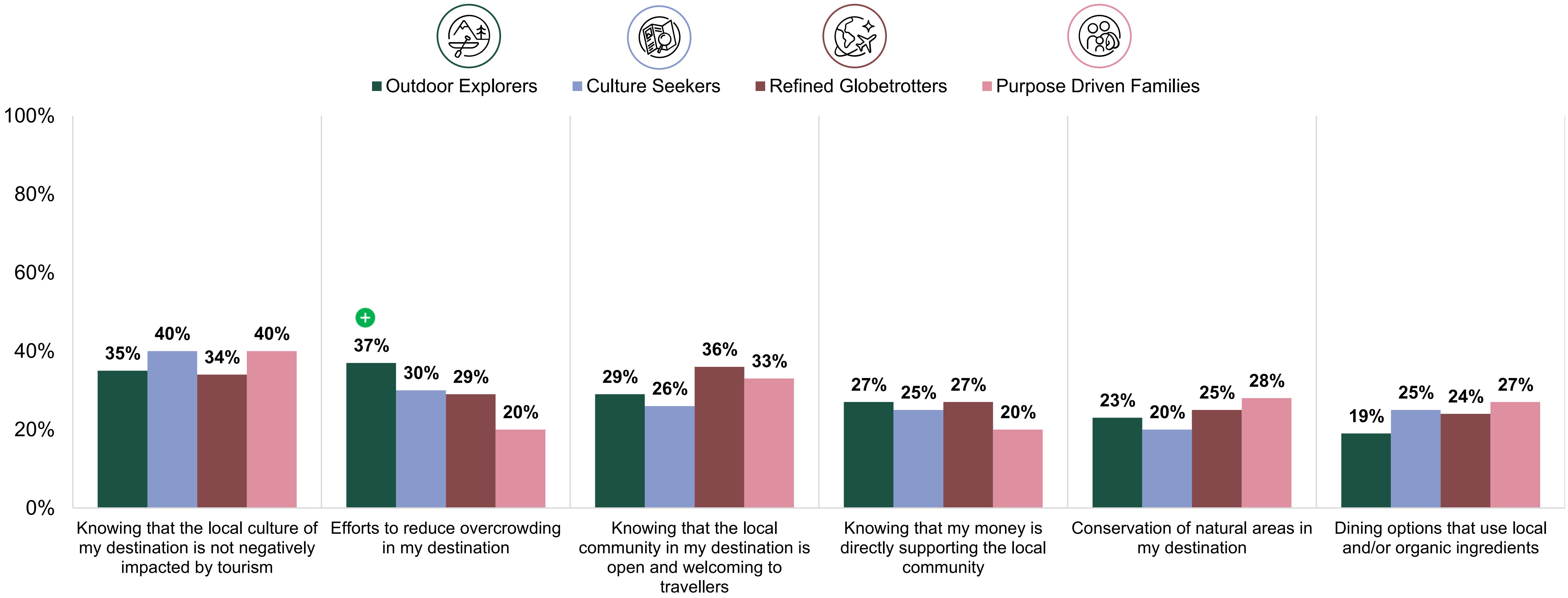
Oceanside beaches continue to top the list of sought after activities.



Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1535); HEG (n=1107)
D4. In general, what activities or places are you interested in while on holiday? (Select all that apply)

MOST IMPORTANT SUSTAINABILITY EFFORTS (TOP 6): BY SEGMENTS

Efforts to reduce overcrowding are more important to OEs than other segments.

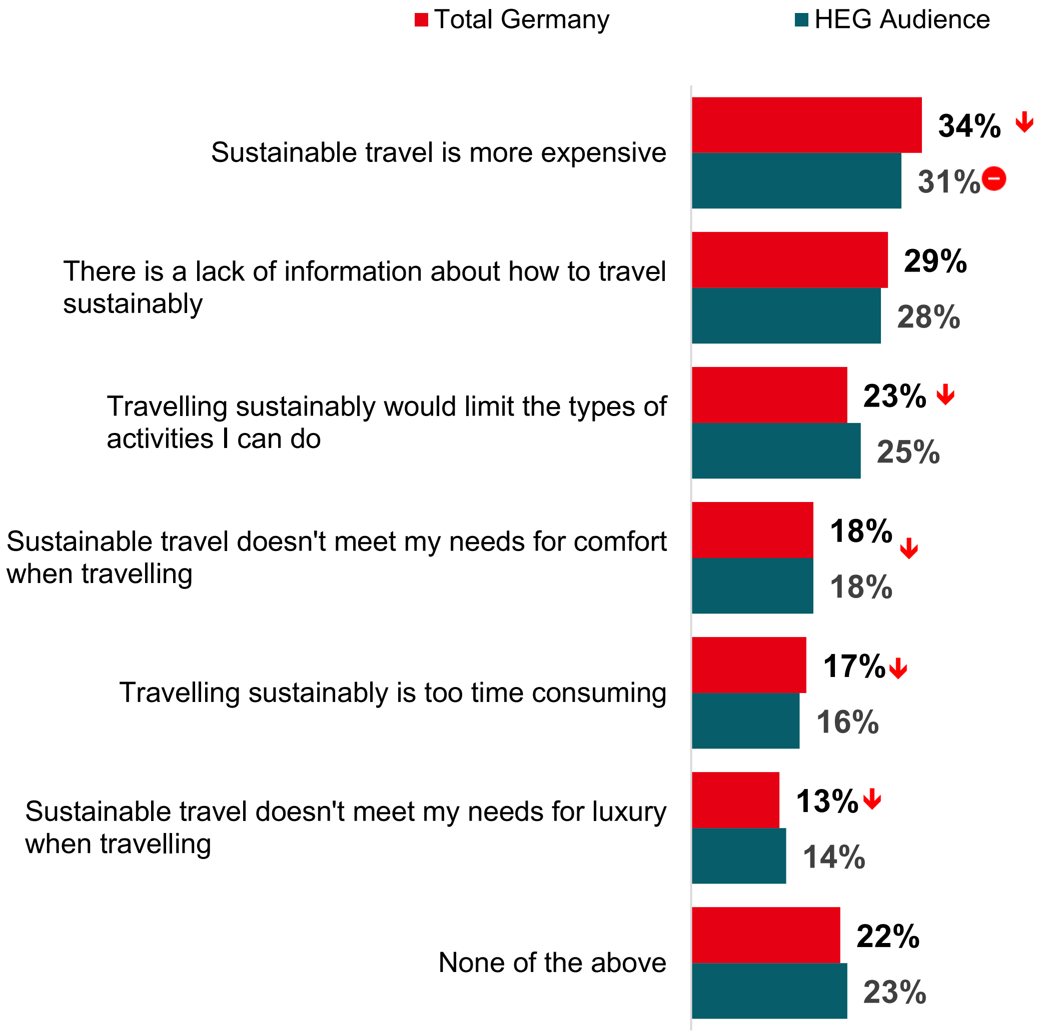


Note: respondents were asked either about most important sustainability efforts (D8) or barriers to sustainable travel (D9)
Base: Long-haul pleasure travellers (past 3 years or next 2 years): Outdoor Explorers (n=206); Culture Seekers (n=128); Refined Globetrotters (n=143); Purpose Driven Families (n=73)
D8. What are the top 3 sustainability efforts that are most important to you when selecting a holiday destination? Select up to three choices.

+ / − = significantly higher/lower result (Segments vs. 2024 Total)

BARRIERS TO SUSTAINABLE TRAVEL

Expense is the top barrier to sustainable travel, although this has decreased vs. a year ago and is lower among HEGs.



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".

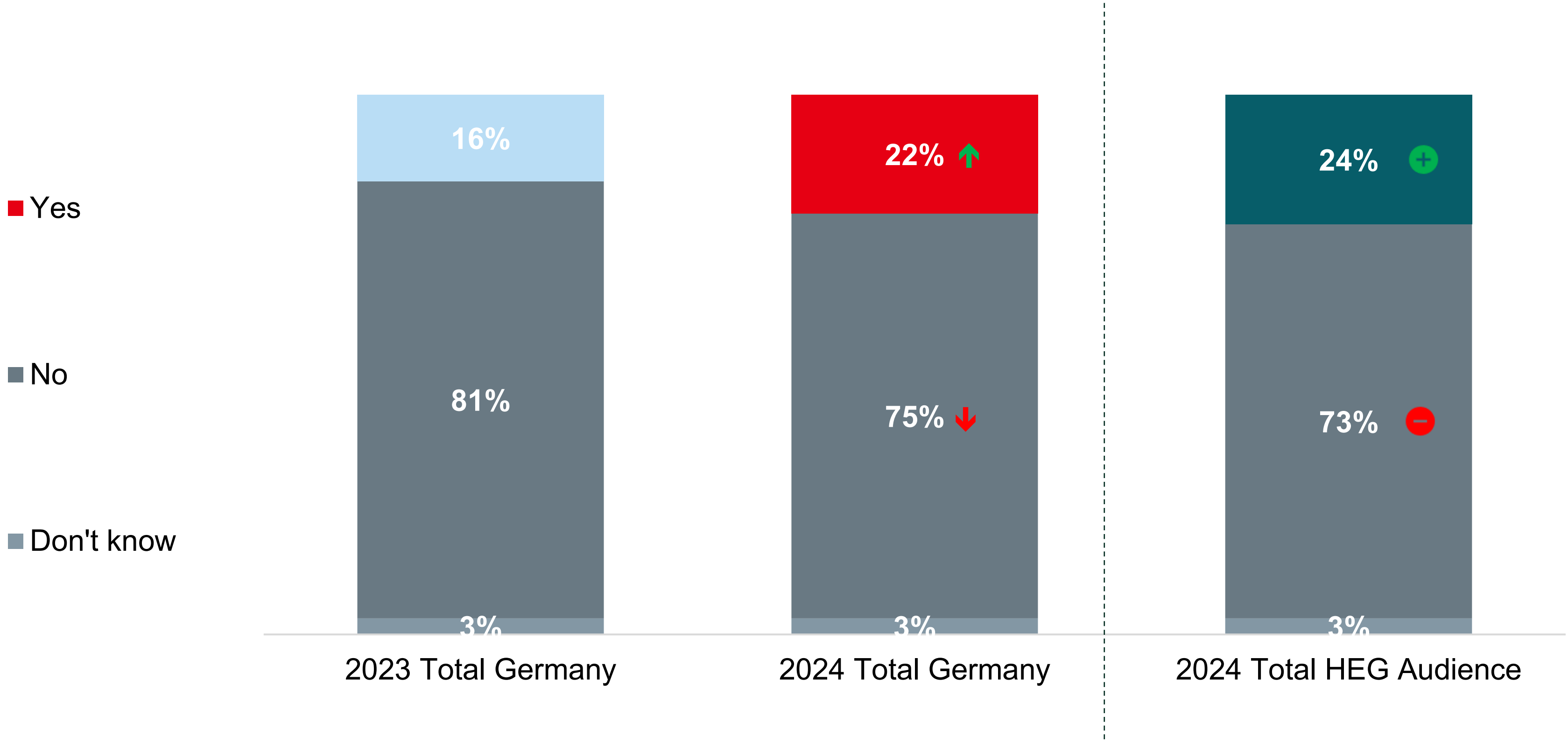
↑ / ↓ = significantly higher/lower result (2024 vs. 2023)

⊕ / ⊖ = significantly higher/lower result (HEG vs. 2024 Total)

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=759); HEG (n=557)
D9. Which of the following factors prevents you from choosing sustainable travel options? Select all that apply.

USAGE OF AI TOOLS TO PLAN TRIPS

While most do not use AI tools, usage has increased to 22% vs. year ago and is higher among HEGs (24%).



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

+ / − = significantly higher/lower result (HEG vs. 2024 Total)

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1535); HEG (n=1107)
D14. Have you ever used an AI tool (e.g. ChatGPT or Bard) to research or plan a trip?

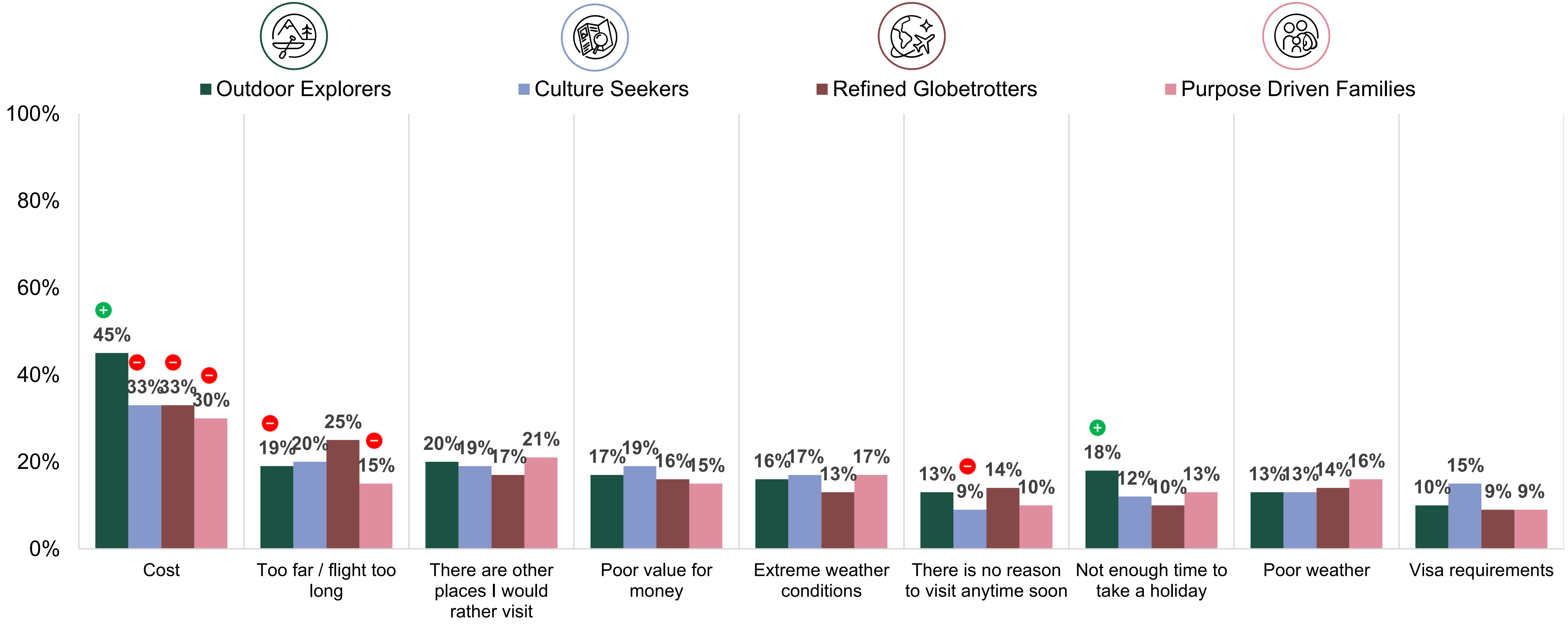
Summerside
Prince Edward Island

CANADA TRAVEL BARRIERS AND MOTIVATORS

BARRIERS FOR TRAVEL TO CANADA (TOP 9): BY SEGMENTS

DESTINATION CANADA

Cost is a top barrier for all, but more so for OEs who are also more likely to say that don't have enough time to take a holiday.



Base: Long-haul pleasure travellers (past 3 years or next 2 years) Outdoor Explorers (n=398); Culture Seekers (n=264); Refined Globetrotters (n=294); Purpose Driven Families (n=151)
E5. Which of the following factors might discourage you from visiting Canada? (Select all that apply)

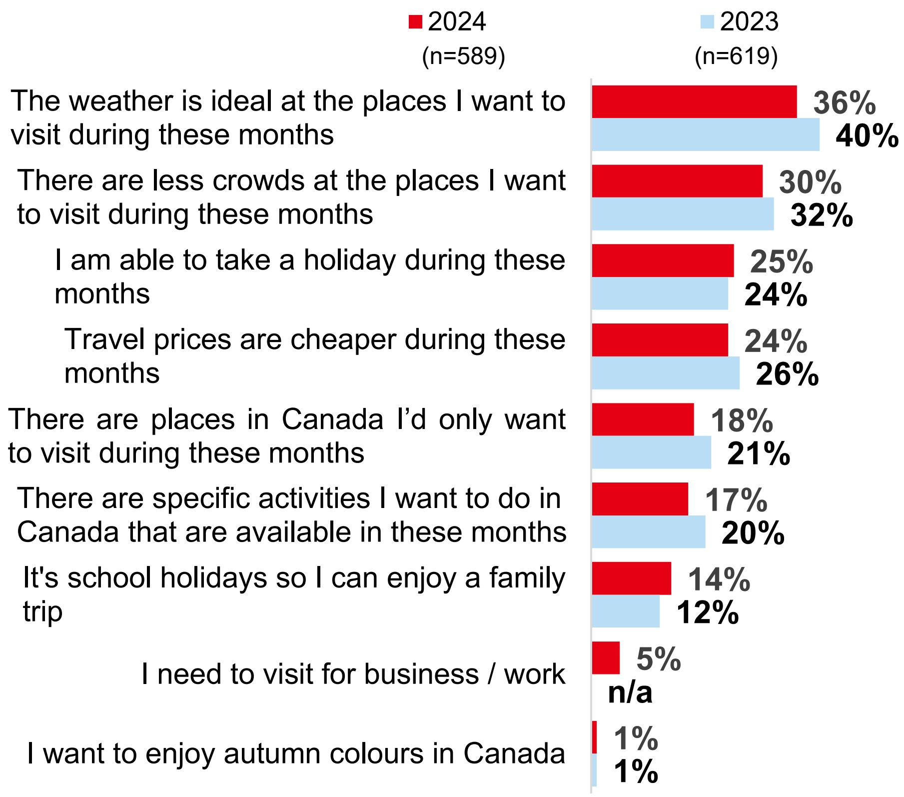
+ / – = significantly higher/lower result (HEG vs. 2024 Total)

MOTIVATORS & BARRIERS FOR FALL TRAVEL TO CANADA

DESTINATION CANADA

Weather is both a barrier and motivator. Further, one-third (30%) are motivated by the fact that there are less crowds at the places they want to visit during these months.

Motivators for Fall Travel



Barriers for Fall Travel

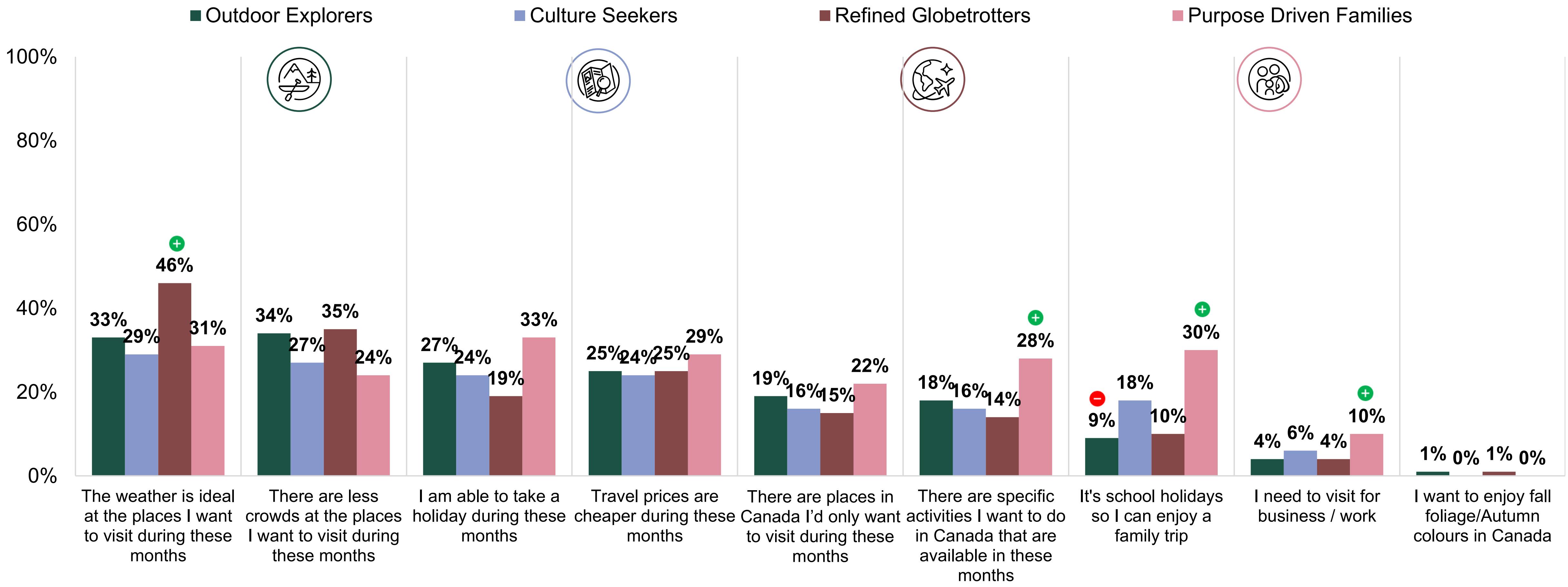
Base: Those in the dream to purchase stages of the path to purchase for Canada and considering visiting Canada or any province/territory in September, October or November
E6a. You indicated earlier that you are considering taking a holiday to **Canada** during the months of September, October and/or November… Which of the following describes why you would be interested in travelling to Canada for a holiday during these **autumn months**?
Base: Those in the dream to purchase stages of the path to purchase for Canada and not considering visiting Canada or any province/territory in September, October or November
E7. You indicated earlier that you are not considering taking a holiday to **Canada** during the months of September, October and/or November… Which of the following describes why you would **not** be interested in travelling to Canada for a holiday during these **autumn months**?

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

MOTIVATORS FOR FALL TRAVEL TO CANADA: BY SEGMENTS

DESTINATION CANADA

RGs are particularly motivated by what they perceive as ideal weather in Fall. For PDFs, there are specific activities they have in mind for the Fall, and school holidays allow some to visit Canada during this time.



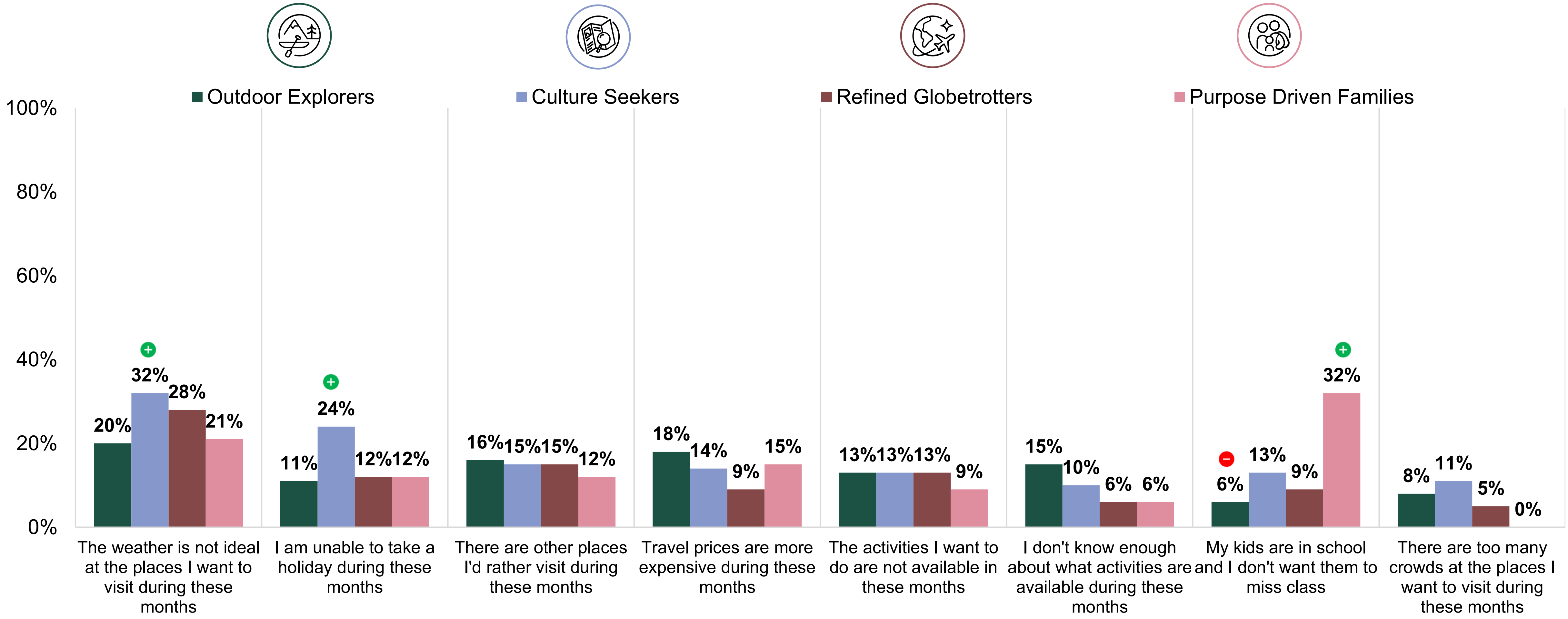
Base: Those in the dream to purchase stages of the path to purchase for Canada and considering visiting Canada or any province/territory in September, October or November: Outdoor Explorers (n=185); Culture Seekers (n=105); Refined Globetrotters (n=117); Purpose Driven Families (n=70)
E6a. You indicated earlier that you are considering taking a holiday to **Canada** during the months of September, October and/or November… Which of the following describes why you would be interested in travelling to Canada for a holiday during these autumn **months**?

+ / − = significantly higher/lower result (HEG vs. 2024 Total)

BARRIERS FOR FALL TRAVEL TO CANADA: BY SEGMENTS

DESTINATION CANADA

PDFs are more restricted by school calendars. The weather in Fall is the biggest barrier for CSs, another significant barrier is their ability to take holidays during these months.



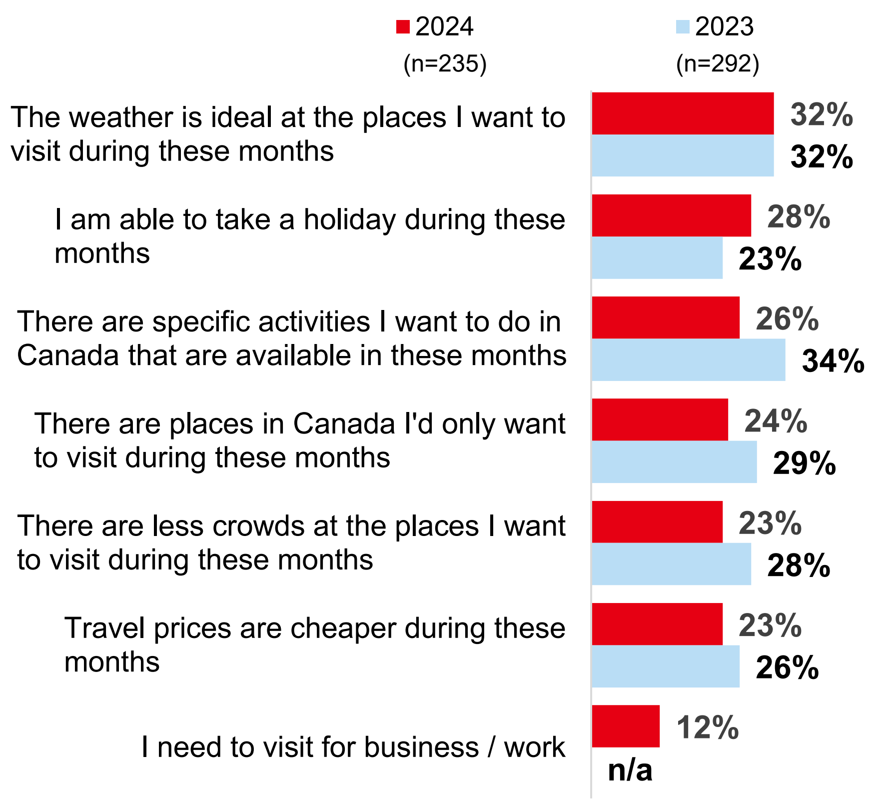
Base: Those in the dream to purchase stages of the path to purchase for Canada and <u>not considering</u> visiting Canada or any province/territory in September, October or November: Outdoor Explorers (n=119); Culture Seekers (n=76); Refined Globetrotters (n=78); Purpose Driven Families (n=34*)
E7. You indicated earlier that you are not considering taking a holiday to **Canada** during the months of September, October and/or November… Which of the following describes why you would **not** be interested in travelling to Canada for a holiday during these **autumn months**?
*Small base size, interpret with caution (n<50)

+ / − = significantly higher/lower result (HEG vs. 2024 Total)

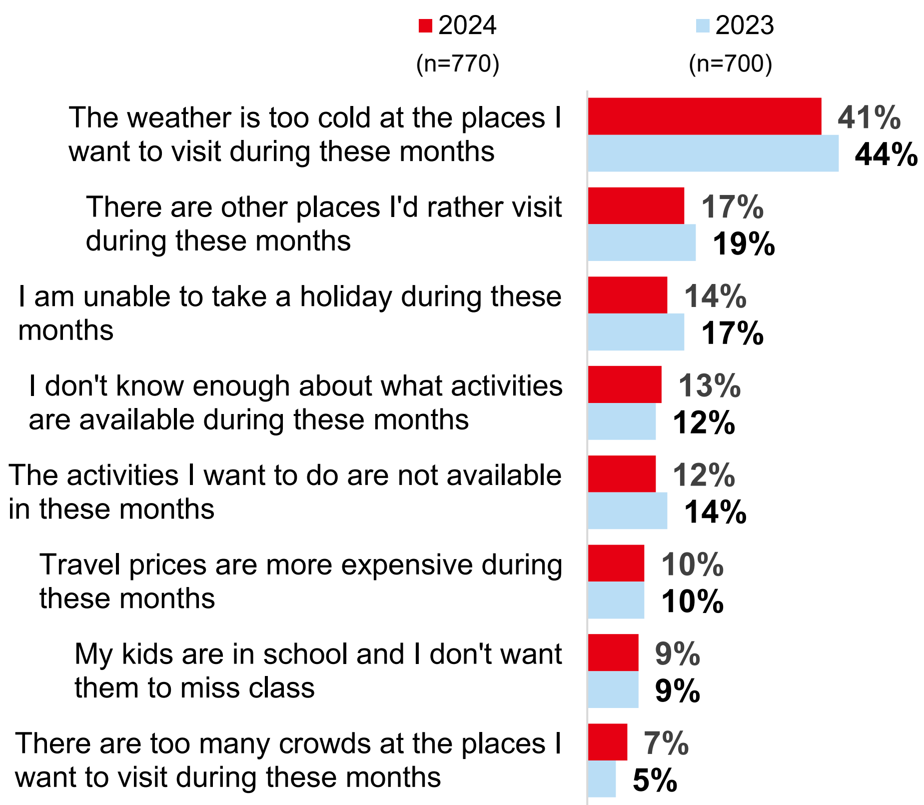
MOTIVATORS & BARRIERS FOR WINTER TRAVEL TO CANADA

The Winter weather in Canada is polarizing among German Travellers. While three in ten (32%) view it as a motivator, four in ten (41%) say it is too cold at the places they want to visit.

Motivators for Winter Travel



Barriers for Winter Travel



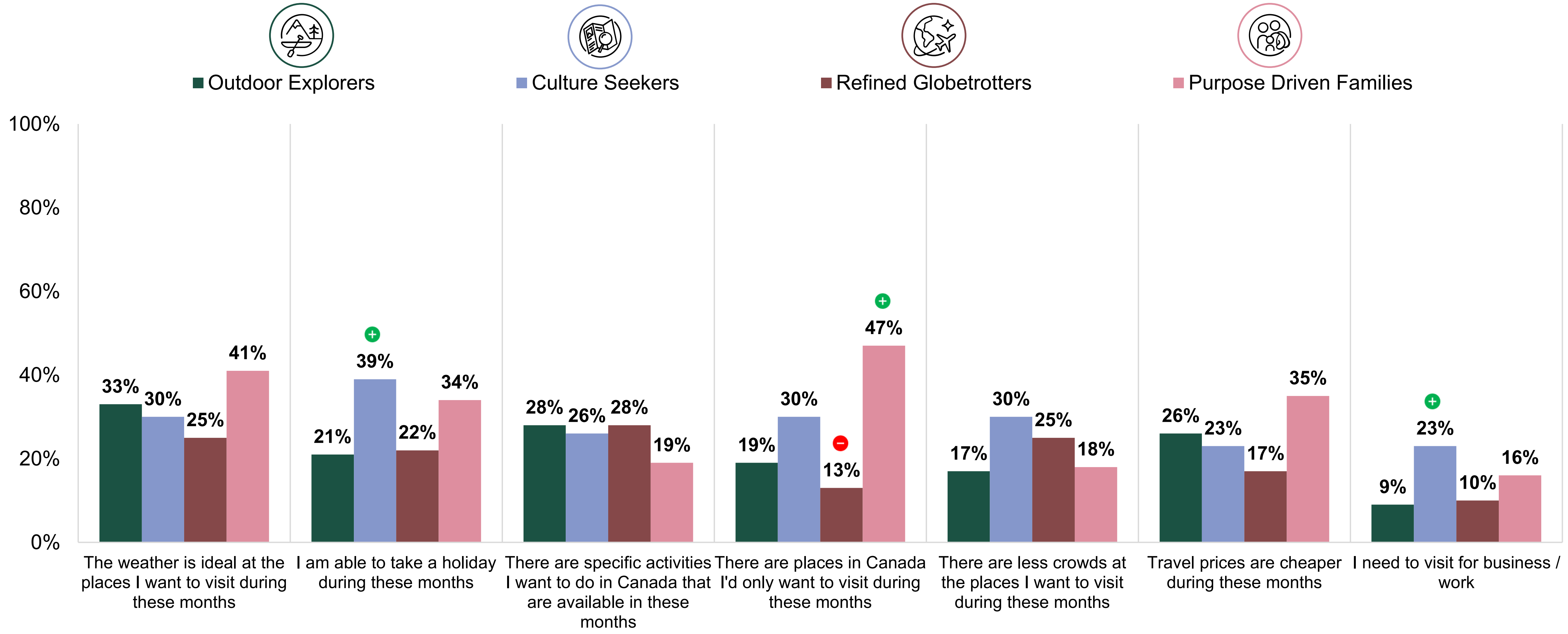
Base: Those in the dream to purchase stages of the path to purchase for Canada and considering visiting Canada or any province/territory in December, January or February
E8a. You indicated earlier that you are considering taking a holiday to **Canada** during the months of December, January and/or February… Which of the following describes why you would be interested in travelling to Canada for a holiday during these **winter months**?
Base: Those in the dream to purchase stages of the path to purchase for Canada and not considering visiting Canada or any province/territory in December, January or February
E9. You indicated earlier that you are not considering taking a holiday to **Canada** during the months of December, January and/or February… Which of the following describes why you would **not** be interested in travelling to Canada for a holiday during these **winter months**?
*Small base size, interpret with caution (n<50)

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

MOTIVATORS FOR WINTER TRAVEL TO CANADA: BY SEGMENTS

DESTINATION CANADA

PDFs are most likely to view the Winter weather as ideal and there are places they want to visit in Canada during these months. CSs are not only most available to take holiday during the Winter months, but they may also be visiting for work.

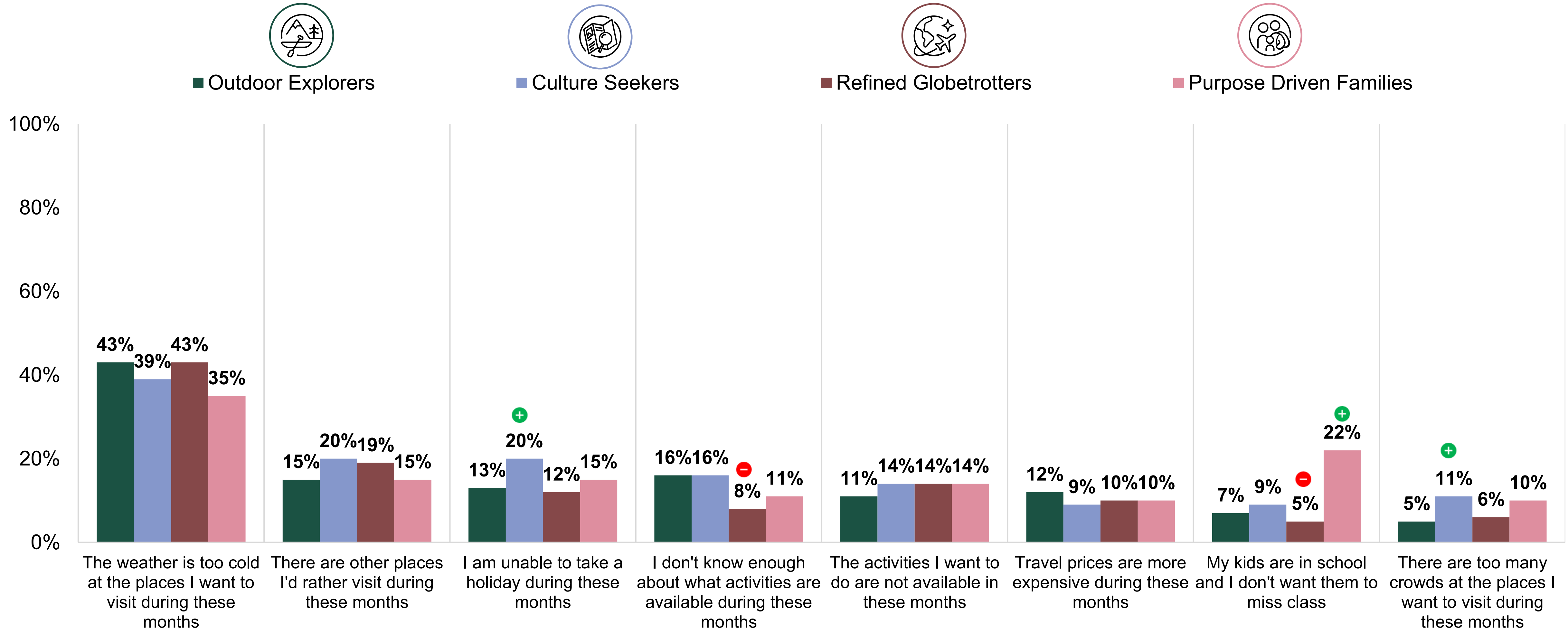


Base: Those in the dream to purchase stages of the path to purchase for Canada and considering visiting Canada or any province/territory in December, January or February: Outdoor Explorers (n=58); Culture Seekers (n=53); Refined Globetrotters (n=53); Purpose Driven Families (n=32*)
E8a. You indicated earlier that you are considering taking a holiday to **Canada** during the months of December, January and/or February… Which of the following describes why you would be interested in travelling to Canada for a holiday during these **winter months**?
*Small base size, interpret with caution (n<50)

+ / − = significantly higher/lower result (HEG vs. 2024 Total)

BARRIERS FOR WINTER TRAVEL TO CANADA: BY SEGMENTS

Cold weather is an issue for all segments including OEs and RGs. Not all CSs are free to take Winter holidays as 20% say this is a barrier. Not surprisingly, PDFS are most likely to say they have kids in school and don't want them to miss class.



Base: Those in the dream to purchase stages of the path to purchase for Canada and not considering visiting Canada or any province/territory in December, January or February: Outdoor Explorers (n=246); Culture Seekers (n=128); Refined Globetrotters (n=142); Purpose Driven Families (n=72)
E9. You indicated earlier that you are not considering taking a holiday to **Canada** during the months of December, January and/or February… Which of the following describes why you would **not** be interested in travelling to Canada for a holiday during these **winter months**?

+ / − = significantly higher/lower result (HEG vs. 2024 Total)


Le Pays de la Sagouine
New Brunswick

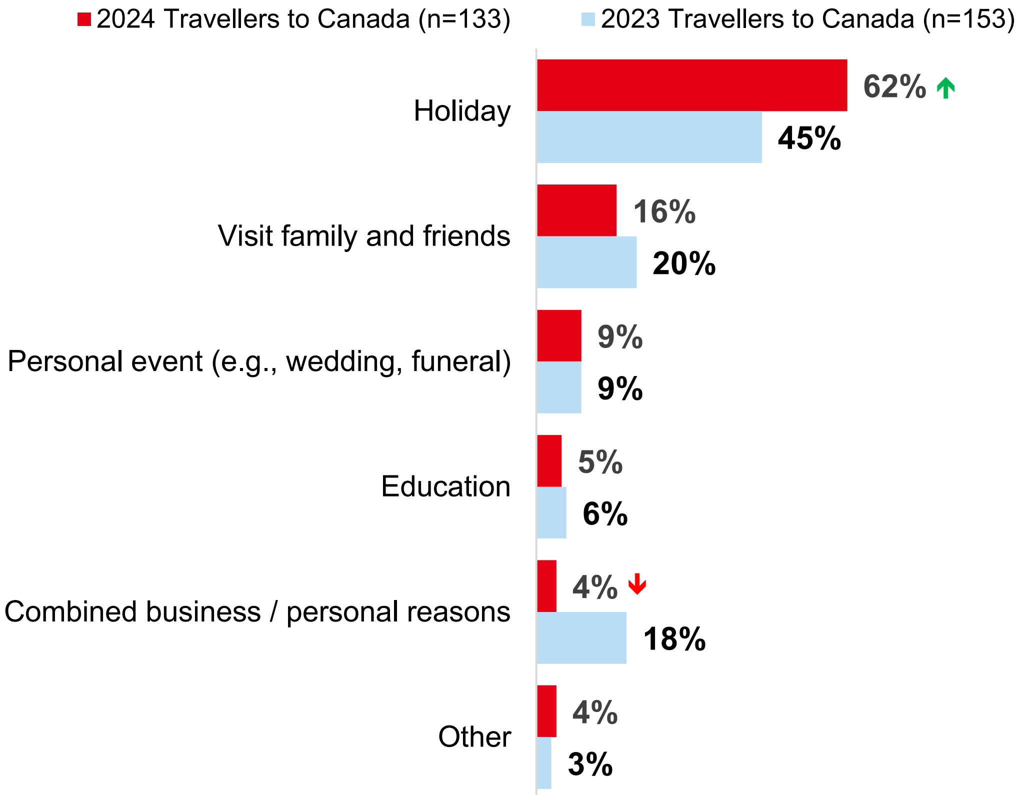
DESTINATION CANADA

MOST RECENT TRIP

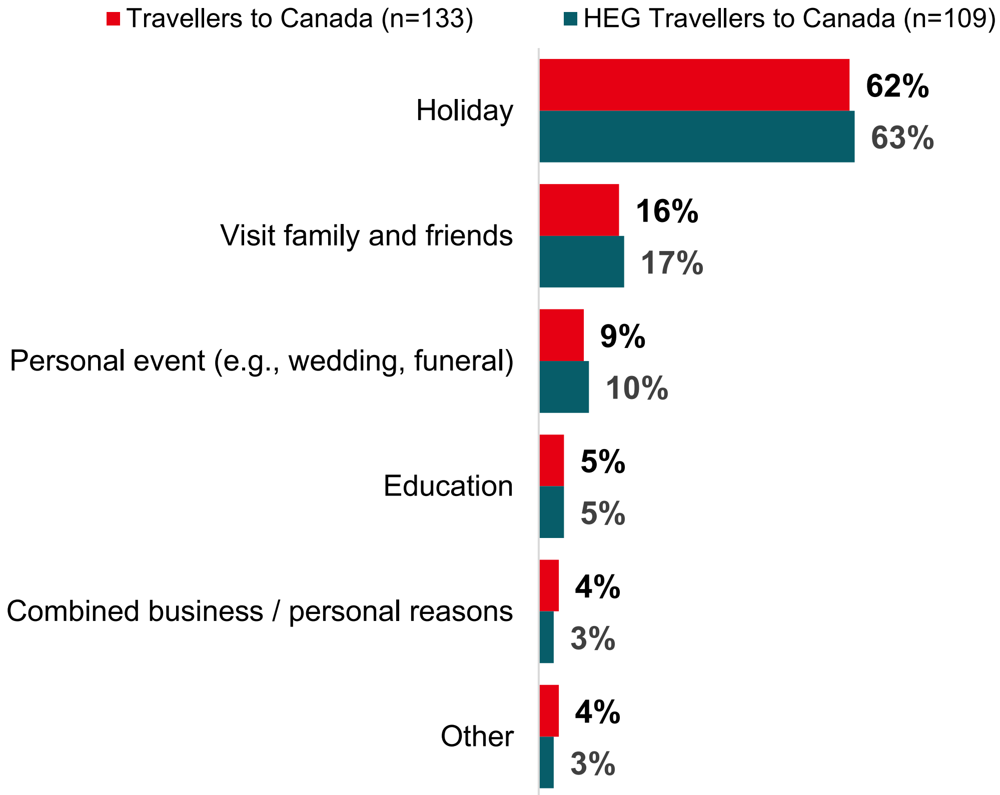
MAIN PURPOSE OF RECENT TRIP

Compared to last year, fewer Germans travelled to Canada for business. Conversely, two-thirds (62%) were on holiday, an increase of 17 points.

Total Travellers to Canada: Trended



Total Travellers to Canada vs. HEG Travellers to Canada



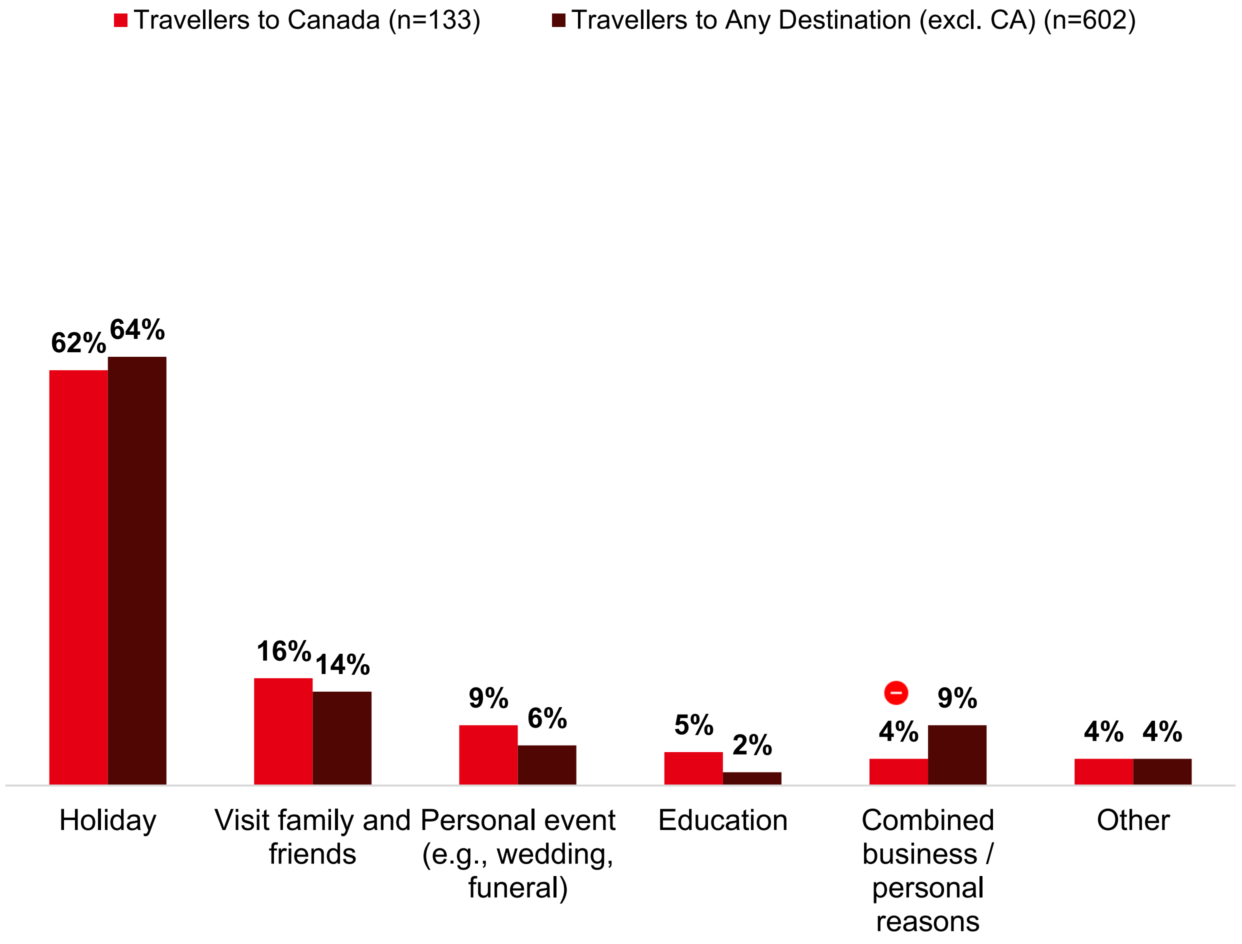
↑ / ↓ = significantly higher/lower result (2024 vs. 2023)

+ / − = significantly higher/lower result (HEG vs. 2024 Total)

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

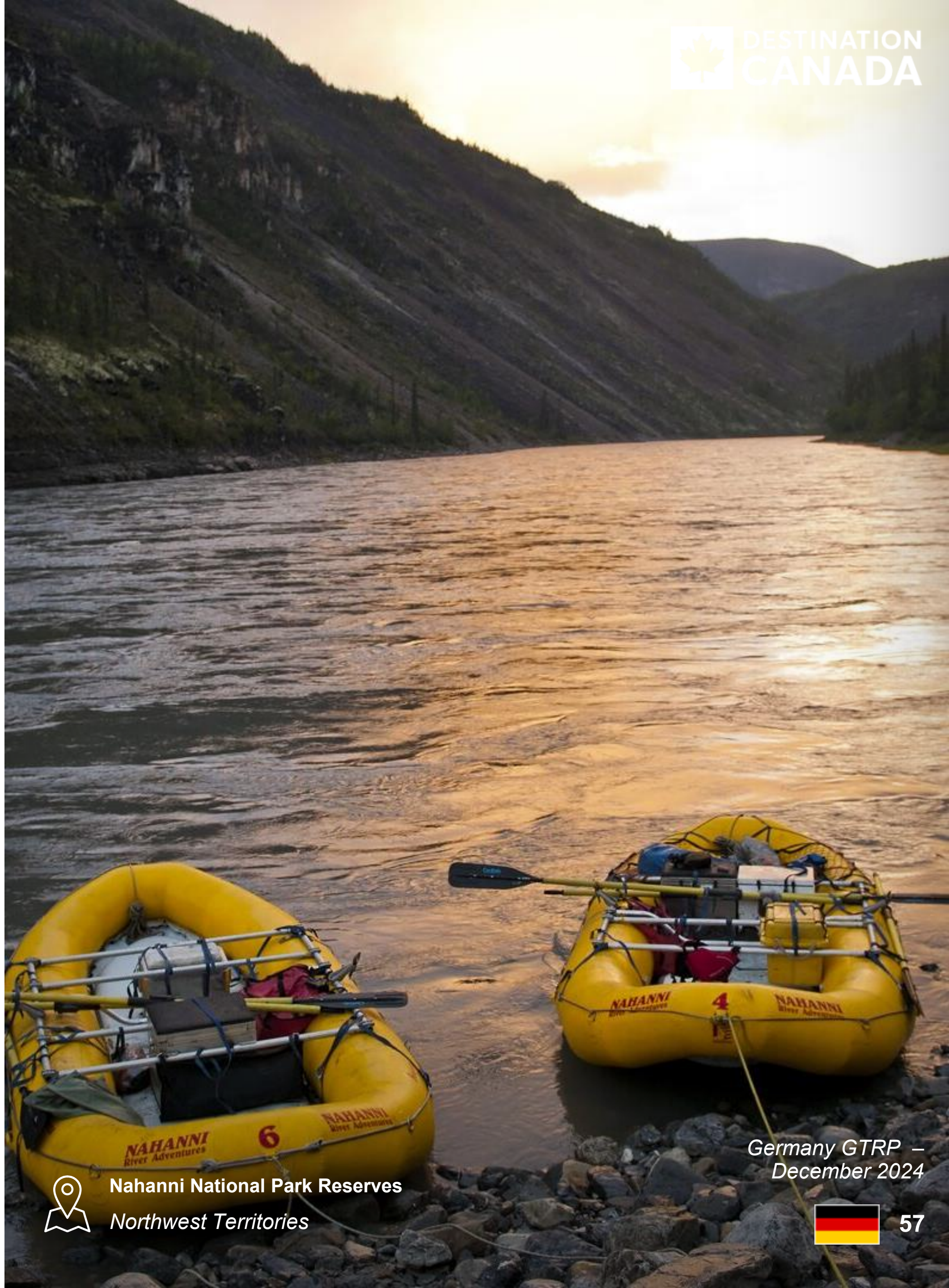
MAIN PURPOSE OF RECENT TRIP: BY DESTINATION

Canada is like other destinations in that the majority visit for leisure.



⊕ / ⊖ = significantly higher/lower result (Travellers to Canada vs. Any Destination (excl. CA))

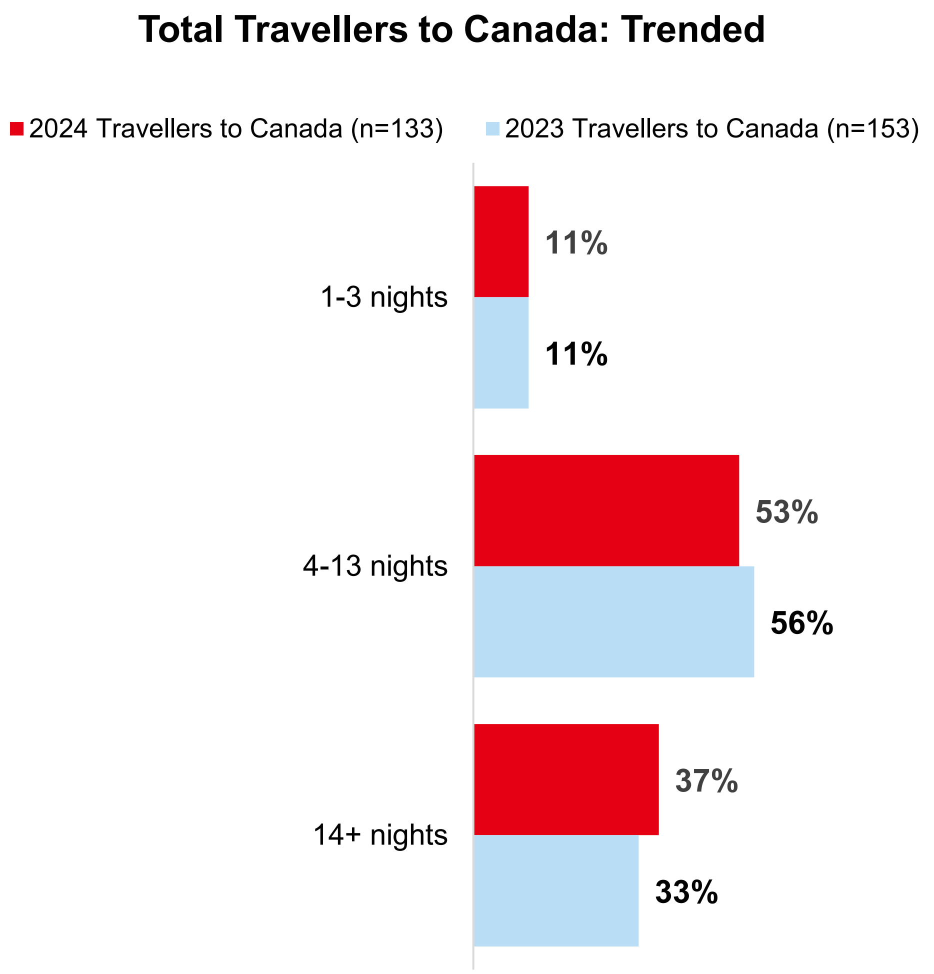
Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination past 3 years
F2. What was the main purpose of this trip? (Select one)

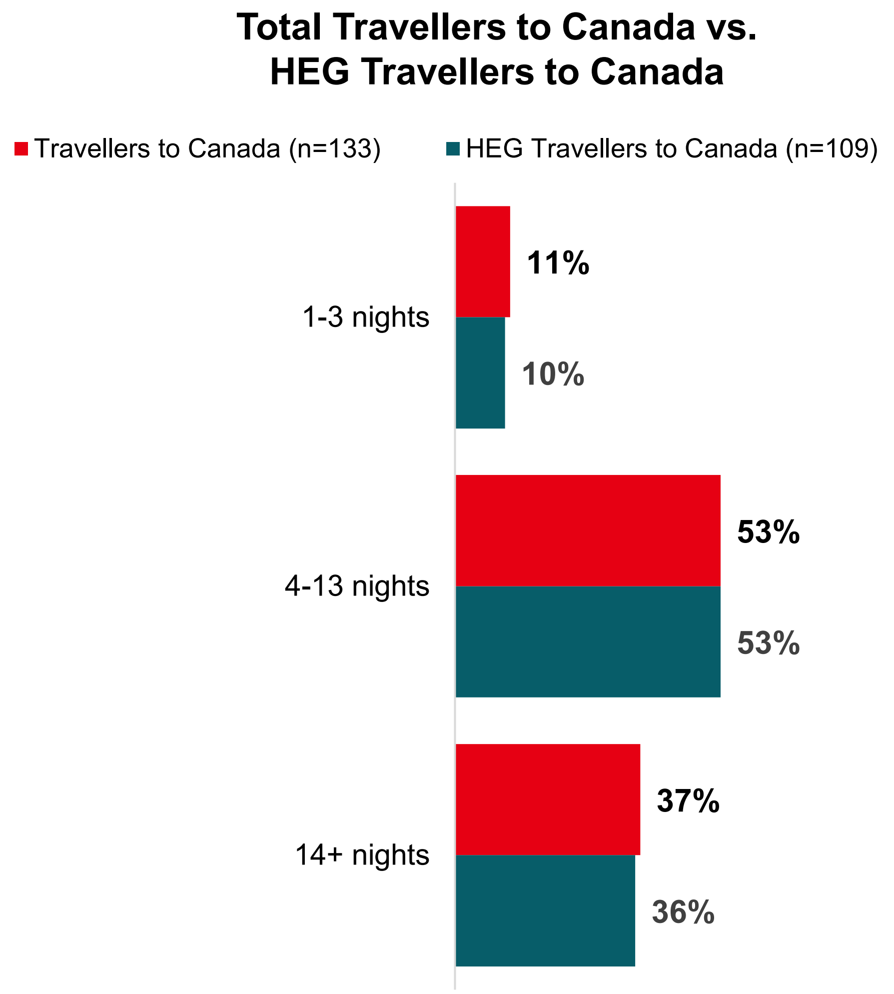


Nahanni National Park Reserves
Northwest Territories

NIGHTS SPENT DURING RECENT TRIP

For nearly all German Travellers, trips to Canada were at least four nights in length with the majority falling in the 4–13 night range.



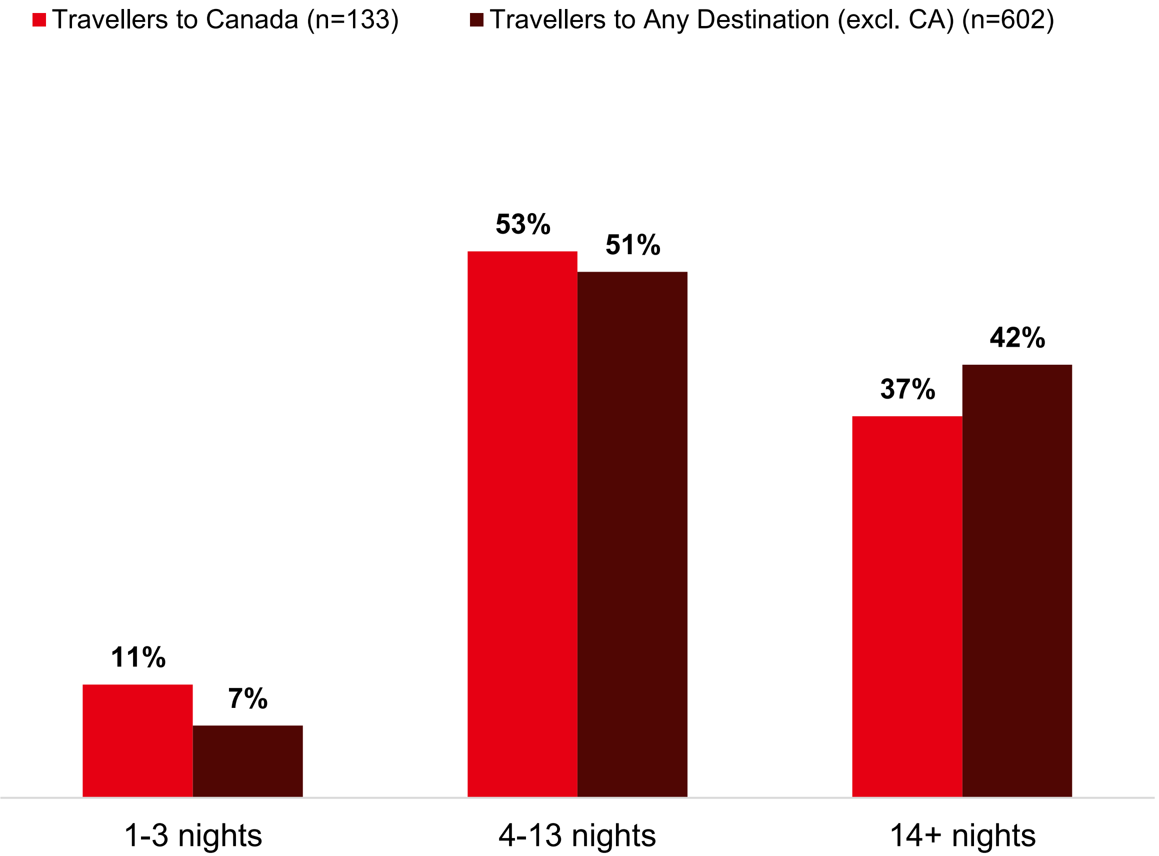


↑ / ↓ = significantly higher/lower result (2024 vs. 2023)
+ / − = significantly higher/lower result (HEG vs. 2024 Total)

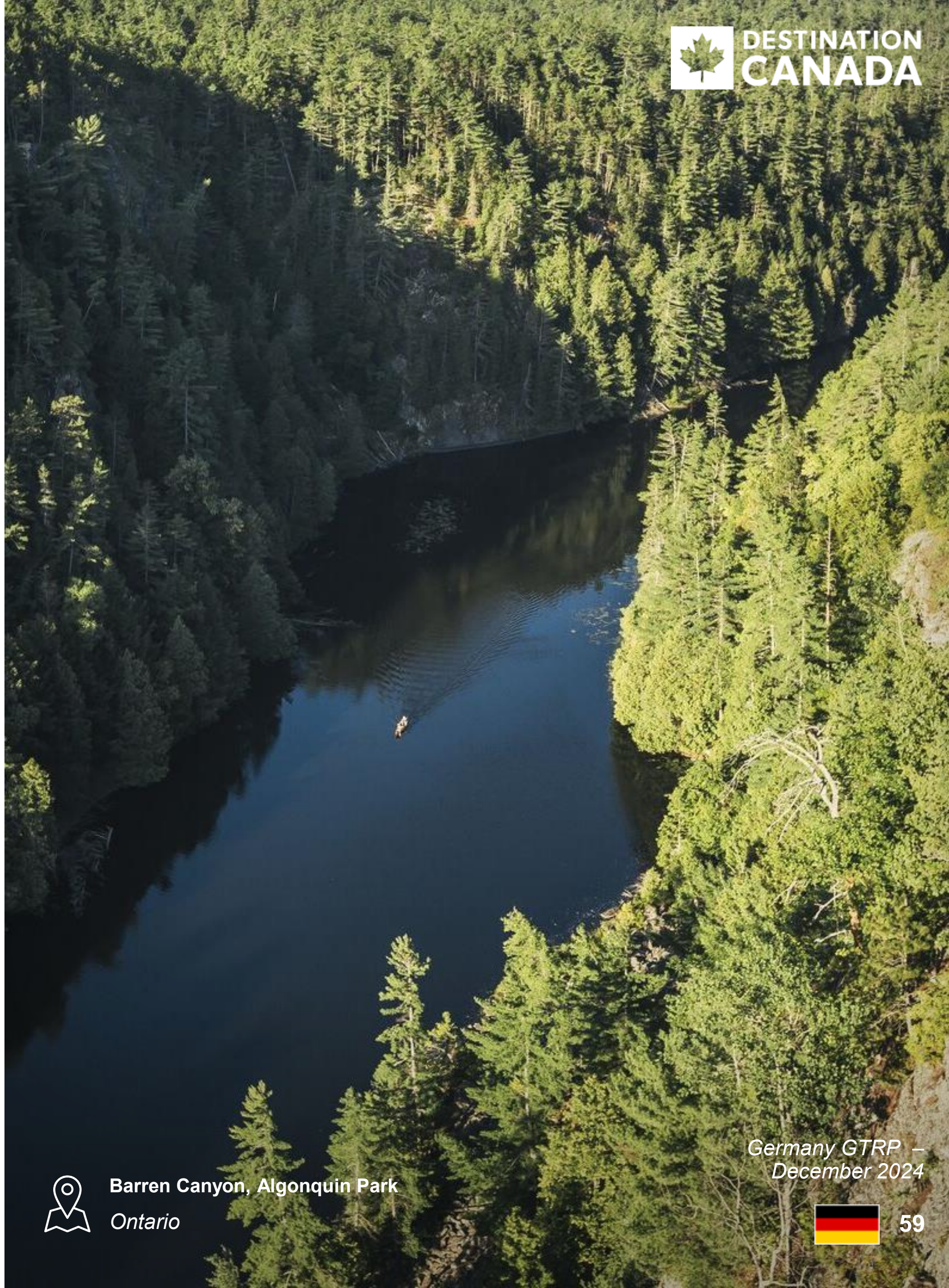
Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination past 3 years
F4. How many nights did you spend in this destination?

NIGHTS SPENT DURING RECENT TRIP: BY DESTINATION

Trip length in Canada is similar to destinations outside of Canada.



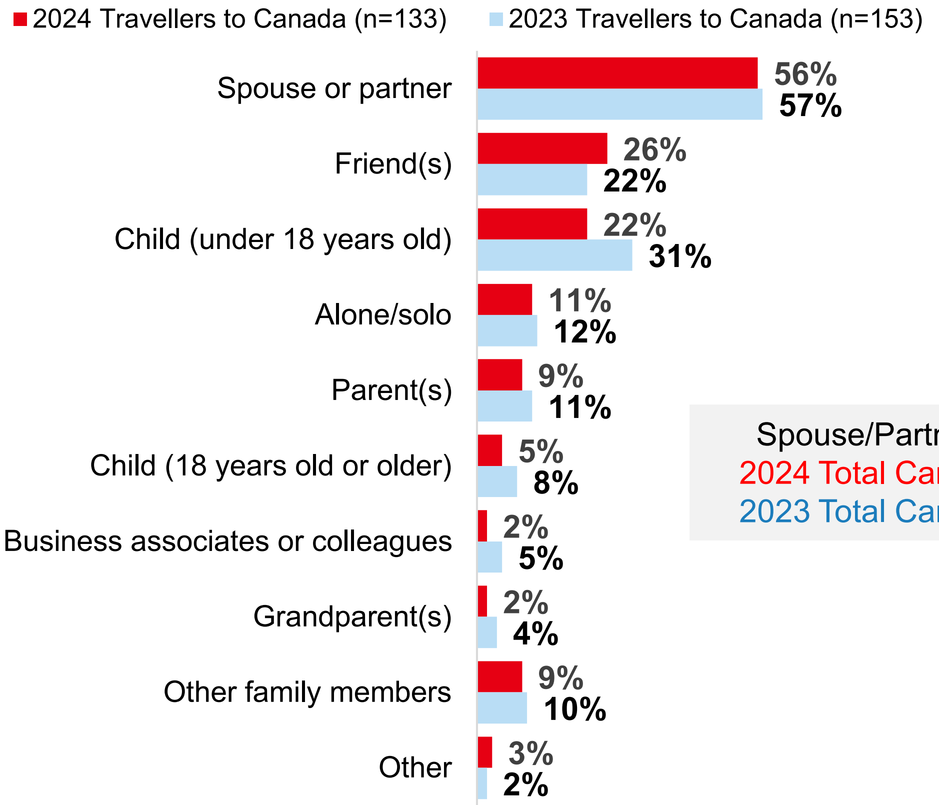
+ / − = significantly higher/lower result (Travellers to Canada vs. Any Destination (excl. CA))
Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination past 3 years
F4. How many nights did you spend in this destination?



TRAVEL PARTY OF RECENT TRIP

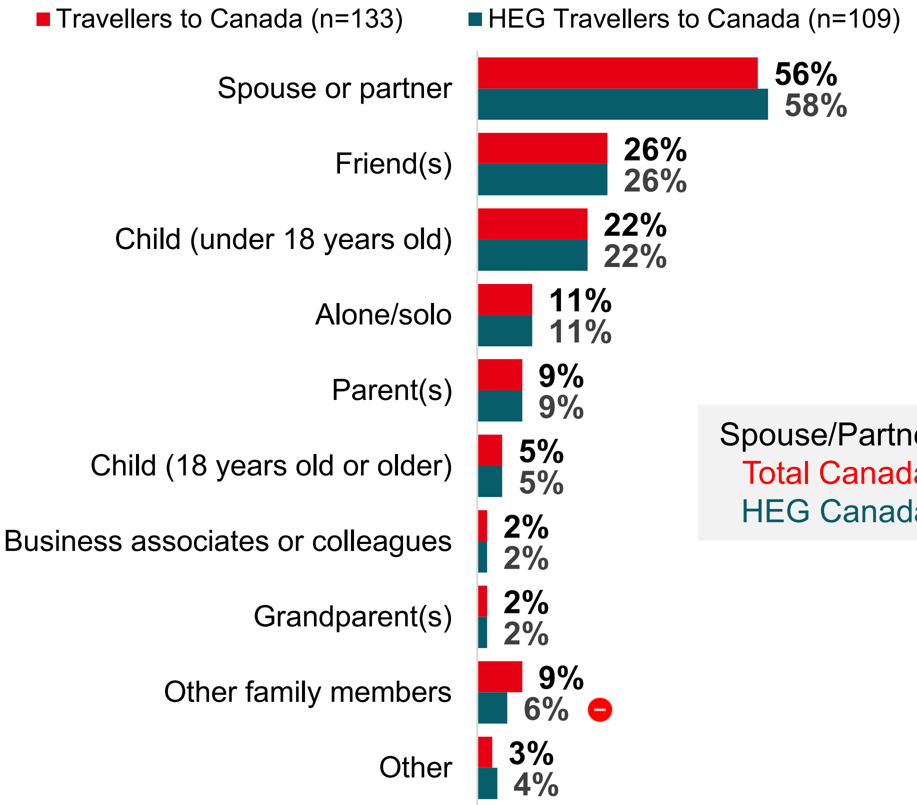
The majority travelled with their spouse or partner. Of note, one-quarter also travelled with friends.

Total Travellers to Canada: Trended



Spouse/Partner ONLY
2024 Total Canada: 27%
2023 Total Canada: 21%

Total Travellers to Canada vs. HEG Travellers to Canada



Spouse/Partner ONLY
Total Canada: 27%
HEG Canada: 28%

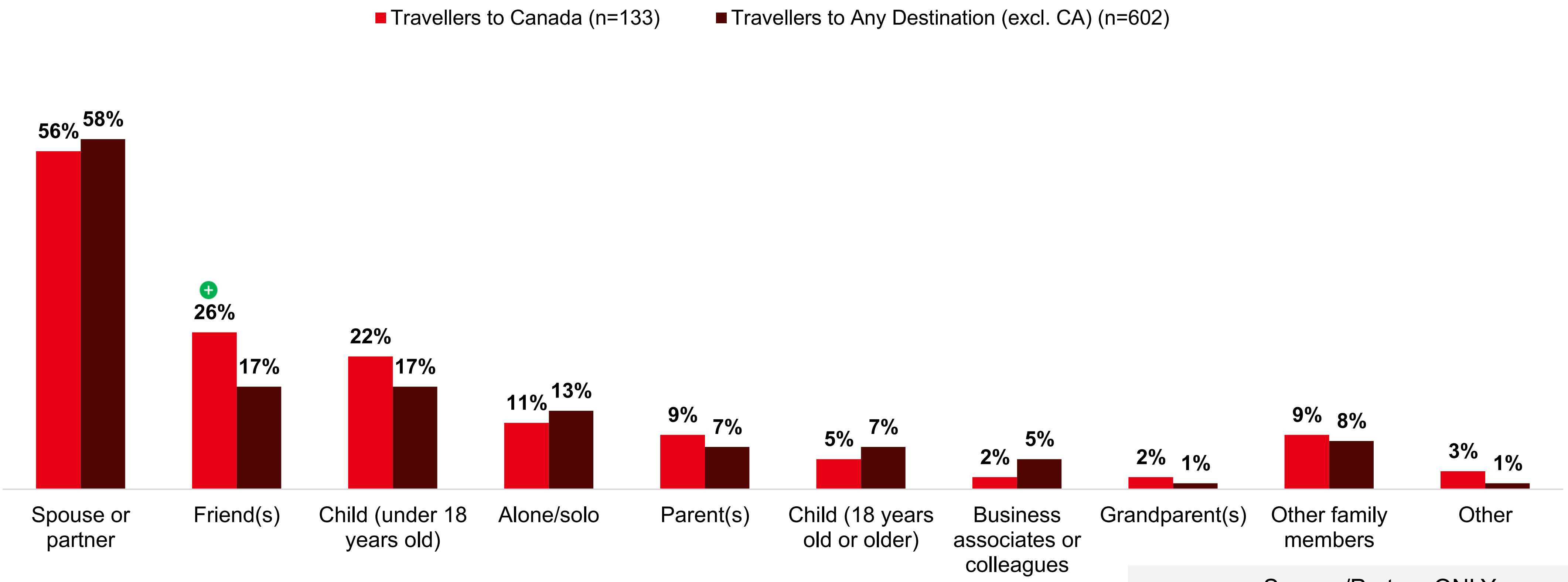
↑ / ↓ = significantly higher/lower result (2024 vs. 2023)
+ / − = significantly higher/lower result (HEG vs. 2024 Total)

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination past 3 years
F5. With whom did you travel on this trip? (Select all that apply)

TRAVEL PARTY OF RECENT TRIP: BY DESTINATION

DESTINATION CANADA

Canada over indexes on travel with friends.



Spouse/Partner ONLY
Travellers to Canada: 27% ⊖
Travellers to Any Destination (excl. CA): 37%

⊕ / ⊖ = significantly higher/lower result (Travellers to Canada vs. Any Destination (excl. CA))

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination past 3 years
F5. With whom did you travel on this trip? (Select all that apply)

TRAVEL AGENTS/TOUR OPERATOR USAGE FOR RECENT TRIP

Four in ten Germans used a travel agent to book their most recent trip to Canada. This is similar among HEGs.

% Used a travel agent
2024 Total Canada: 42%
2023 Total Canada: 45%

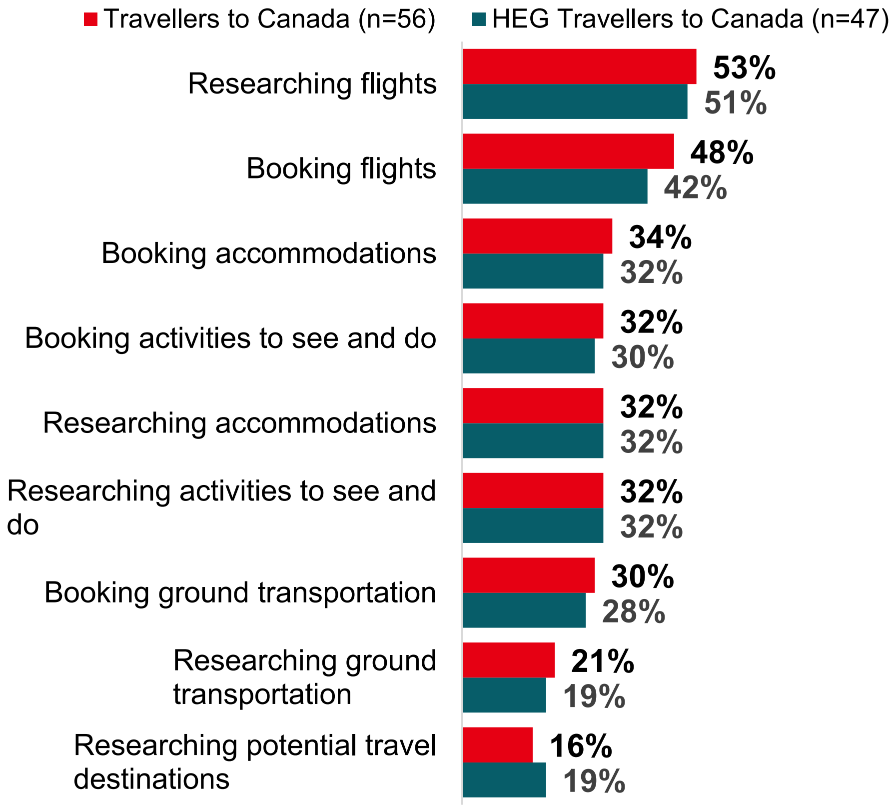
Total Travellers to Canada: Trended

Among those who used a travel agent/tour operator

% Used a travel agent
Total Canada: 42%
HEG Canada: 43%

Total Travellers to Canada vs. HEG Travellers to Canada

Among those who used a travel agent/tour operator



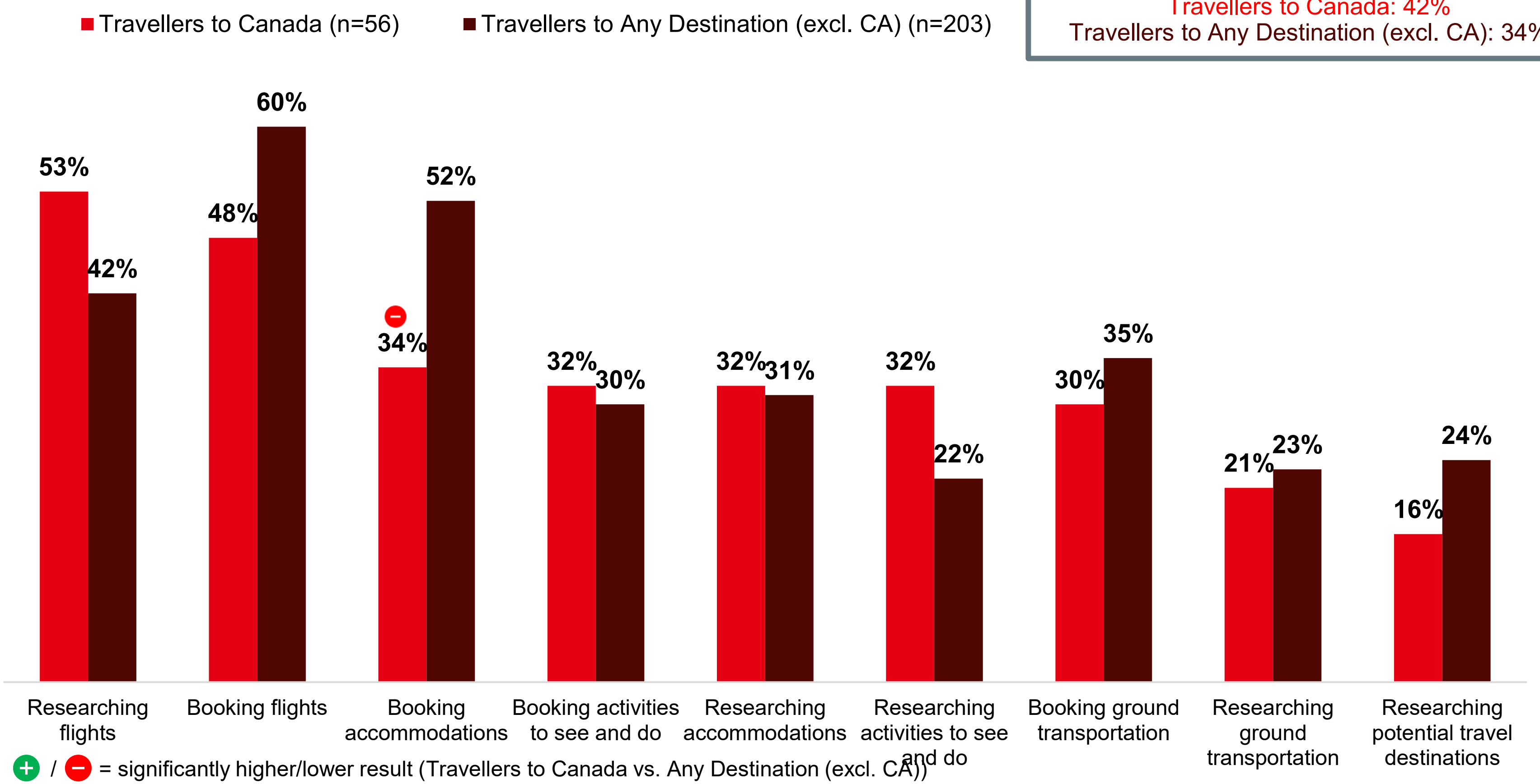
Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination past 3 years
F9. Travel agents offer personalized service to help individuals, groups, and business travellers plan and organize their travel schedules, from purchasing tour packages to booking flights and 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)
Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination past 3 years, Used a Travel Agent/Tour Operator
F10. Which of the following did a travel agent or tour operator help you with?
*Small base size, interpret with caution (n<50)

↑ / ↓ = significantly higher/lower result (2024 vs. 2023)
+ / − = significantly higher/lower result (HEG vs. 2024 Total)

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

Use of travel agents was somewhat higher for trips to Canada (42%) than other destinations (34%). However, services used for Canada trips were more research-based while other destinations skew towards booking flights or accommodations.

% Used a travel agent
Travellers to Canada: 42%
Travellers to Any Destination (excl. CA): 34%



+ / − = significantly higher/lower result (Travellers to Canada vs. Any Destination (excl. CA))

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination past 3 years
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)
Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination past 3 years, Used a Travel Agent/Tour Operator
F10. Which of the following did a travel agent or tour operator help you with?

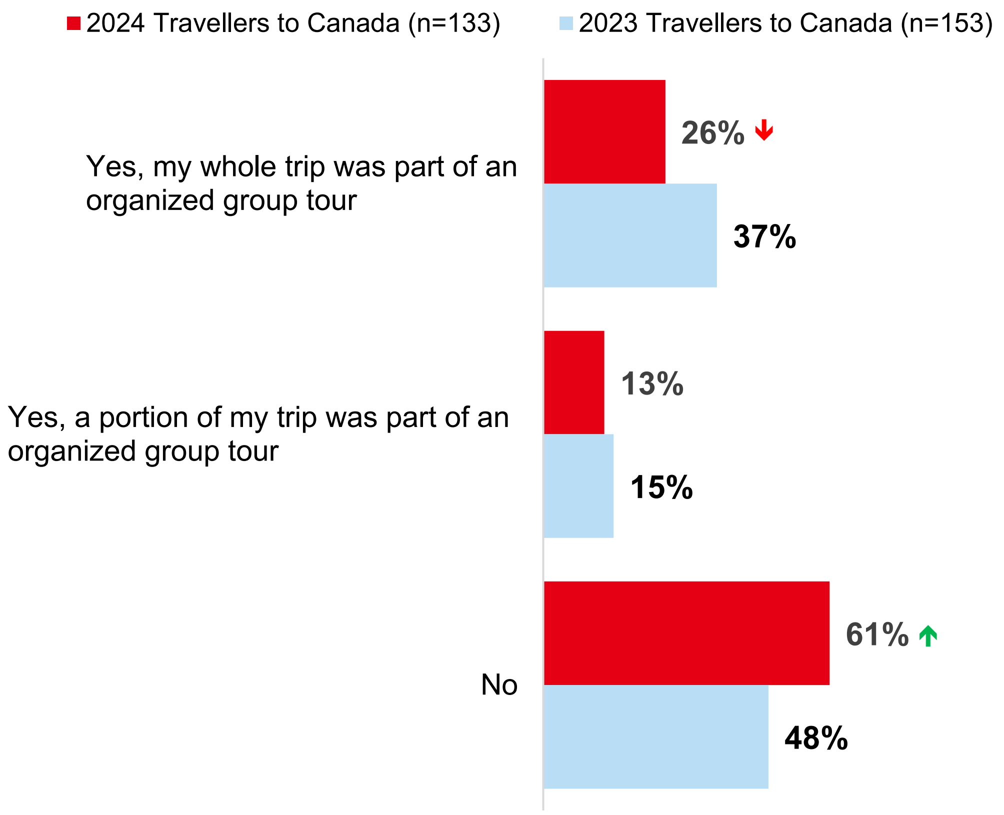
Twin Falls Lodge
Saskatchewan

ORGANIZED GROUP TOUR USAGE FOR RECENT TRIP

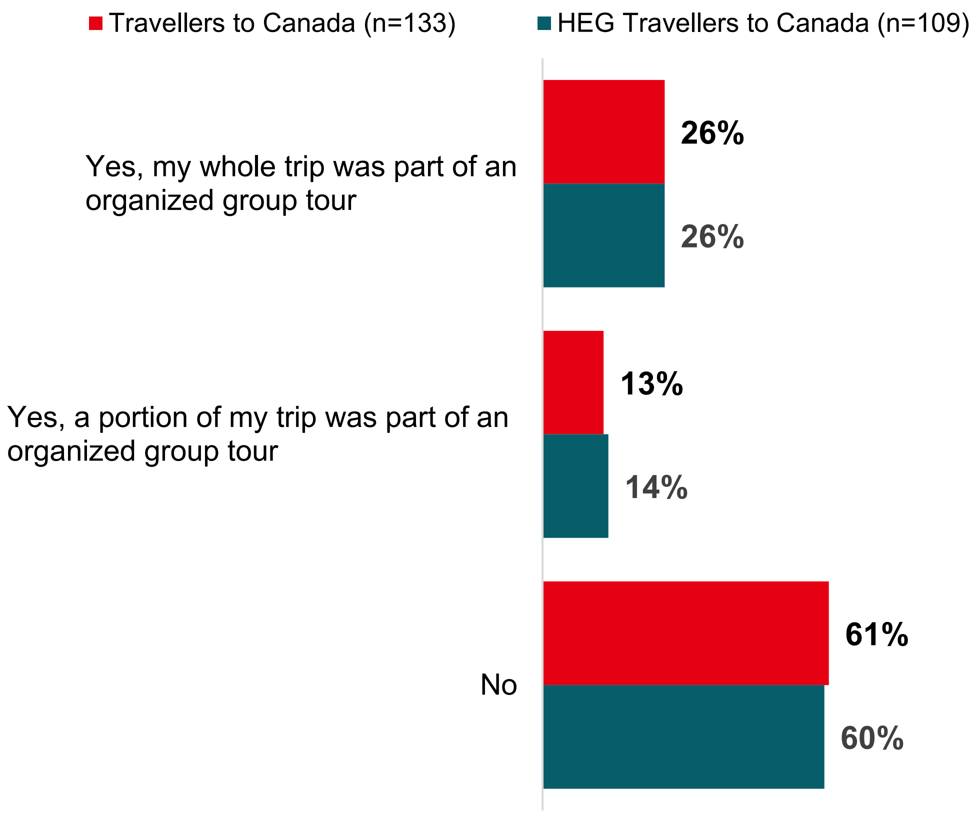
DESTINATION CANADA

Fewer travellers to Canada were part of an organized tour this year vs. last. That said, approximately four in ten (39%) said at least a portion of their trip was organized.

Total Travellers to Canada: Trended



Total Travellers to Canada vs. HEG Travellers to Canada



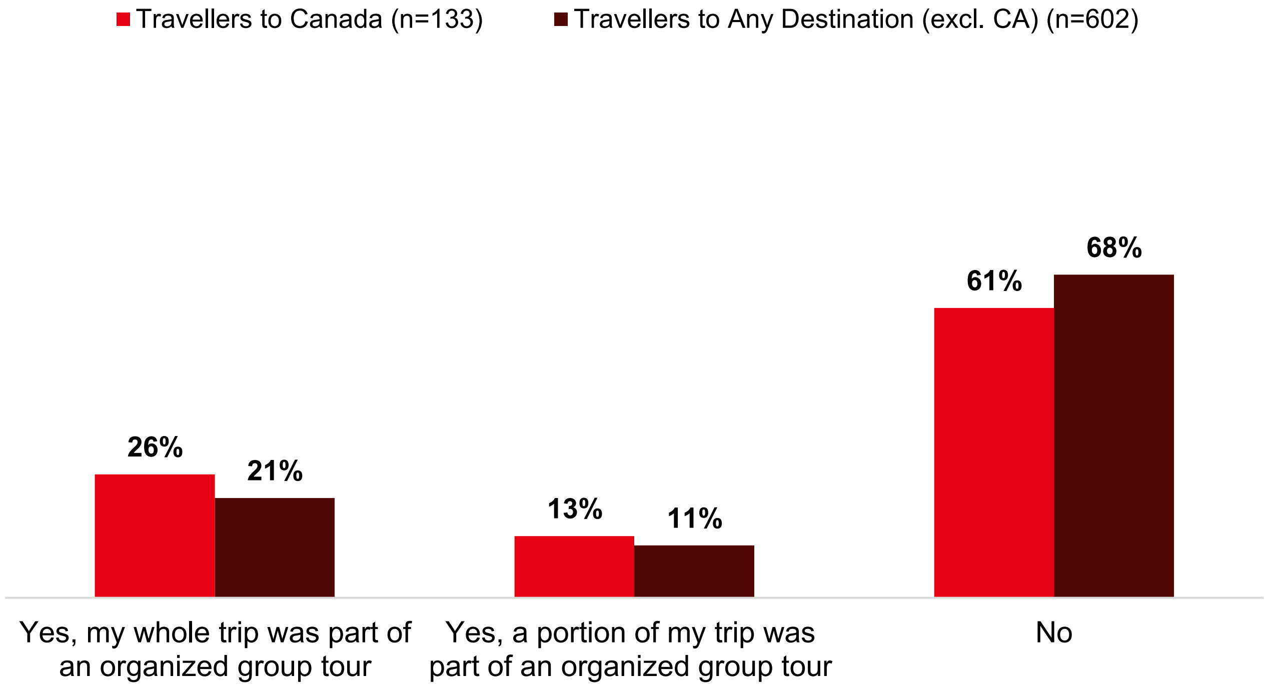
↑ / ↓ = significantly higher/lower result (2024 vs. 2023)

+ / − = significantly higher/lower result (HEG vs. 2024 Total)

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination past 3 years
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?

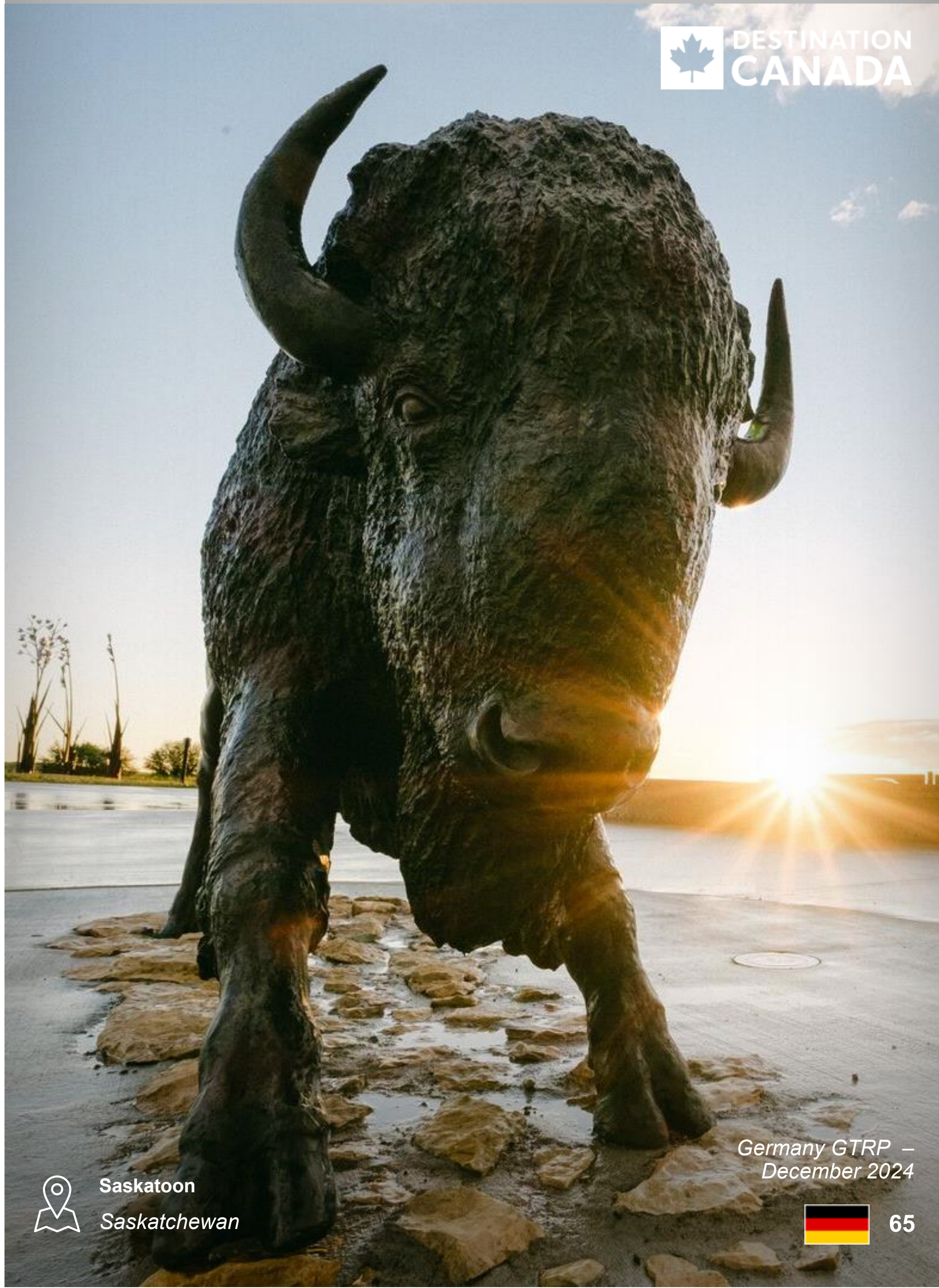
ORGANIZED GROUP TOUR FOR RECENT TRIP: BY DESTINATION

German travellers were just slightly more likely to have gone on an organized group tour to Canada vs. other destinations. This is not, however, a significant difference.



+ / − = significantly higher/lower result (Travellers to Canada vs. Any Destination (excl. CA))

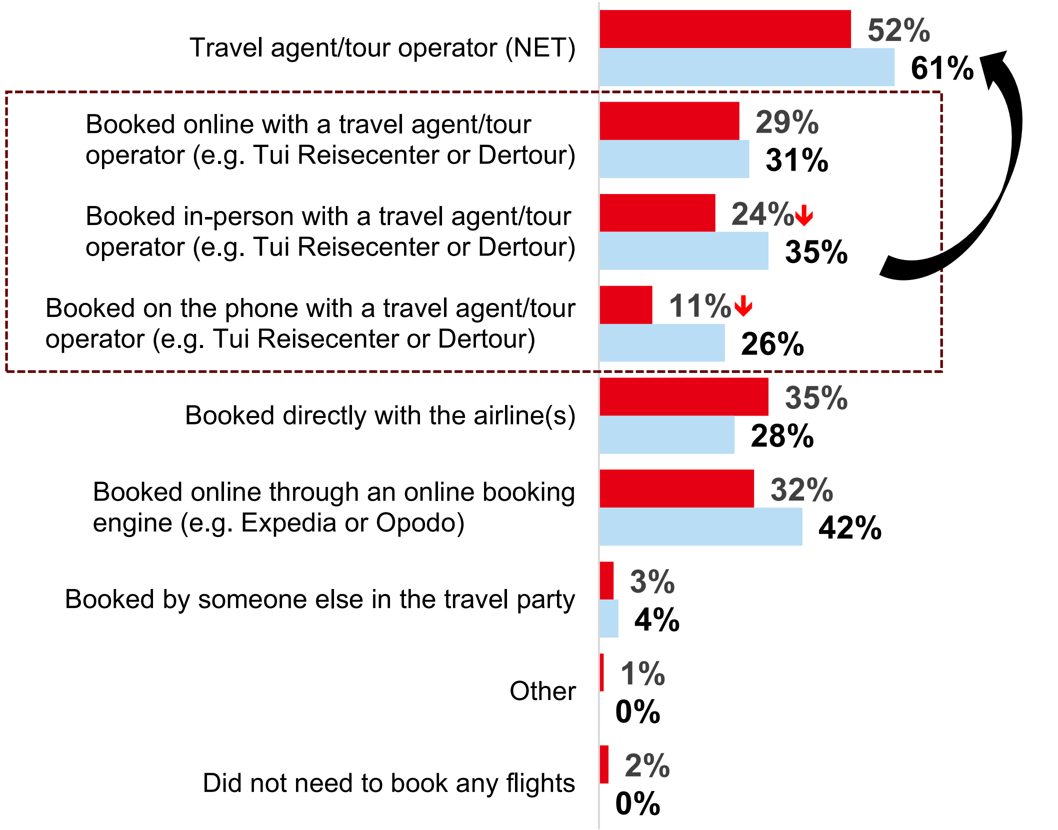
Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination past 3 years
F11. An organized group tour consists of a package where any combination of accommodation, transportation, food and/or activities are included as a multi-day itinerary. Did you travel as a part of an organized group tour on this trip?



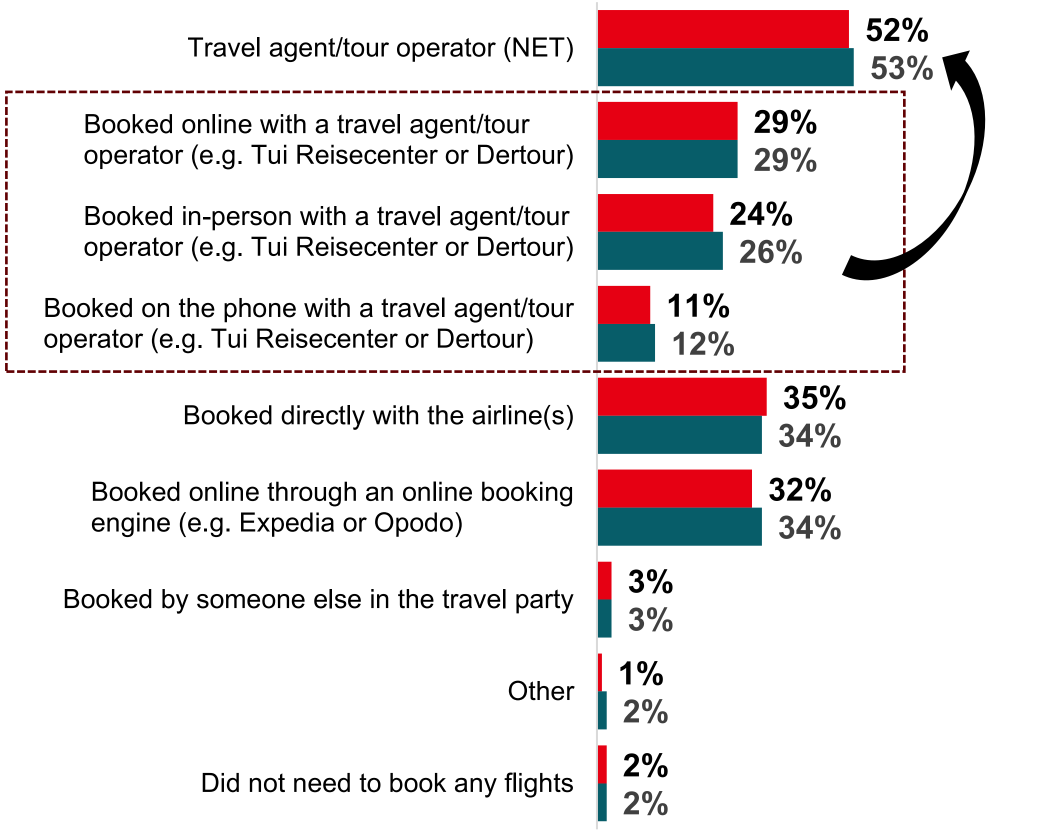
BOOKING FLIGHTS FOR RECENT TRIP

Those who didn't book flights via a travel agent/tour operator likely booked directly with the airline or through a booking engine.

Total Travellers to Canada: Trended



Total Travellers to Canada vs. HEG Travellers to Canada



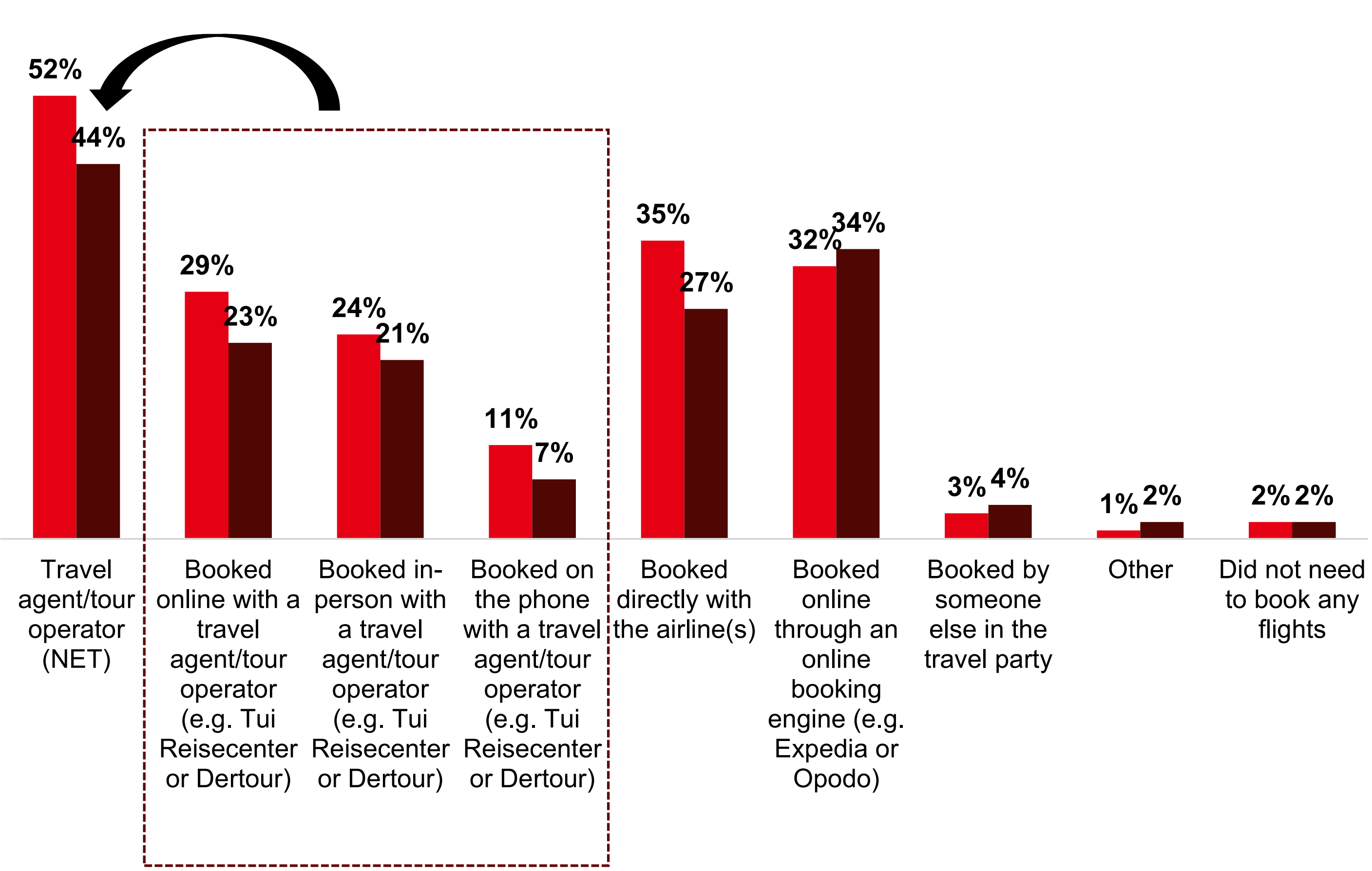
↑ / ↓ = significantly higher/lower result (2024 vs. 2023)

+ / − = significantly higher/lower result (HEG vs. 2024 Total)

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

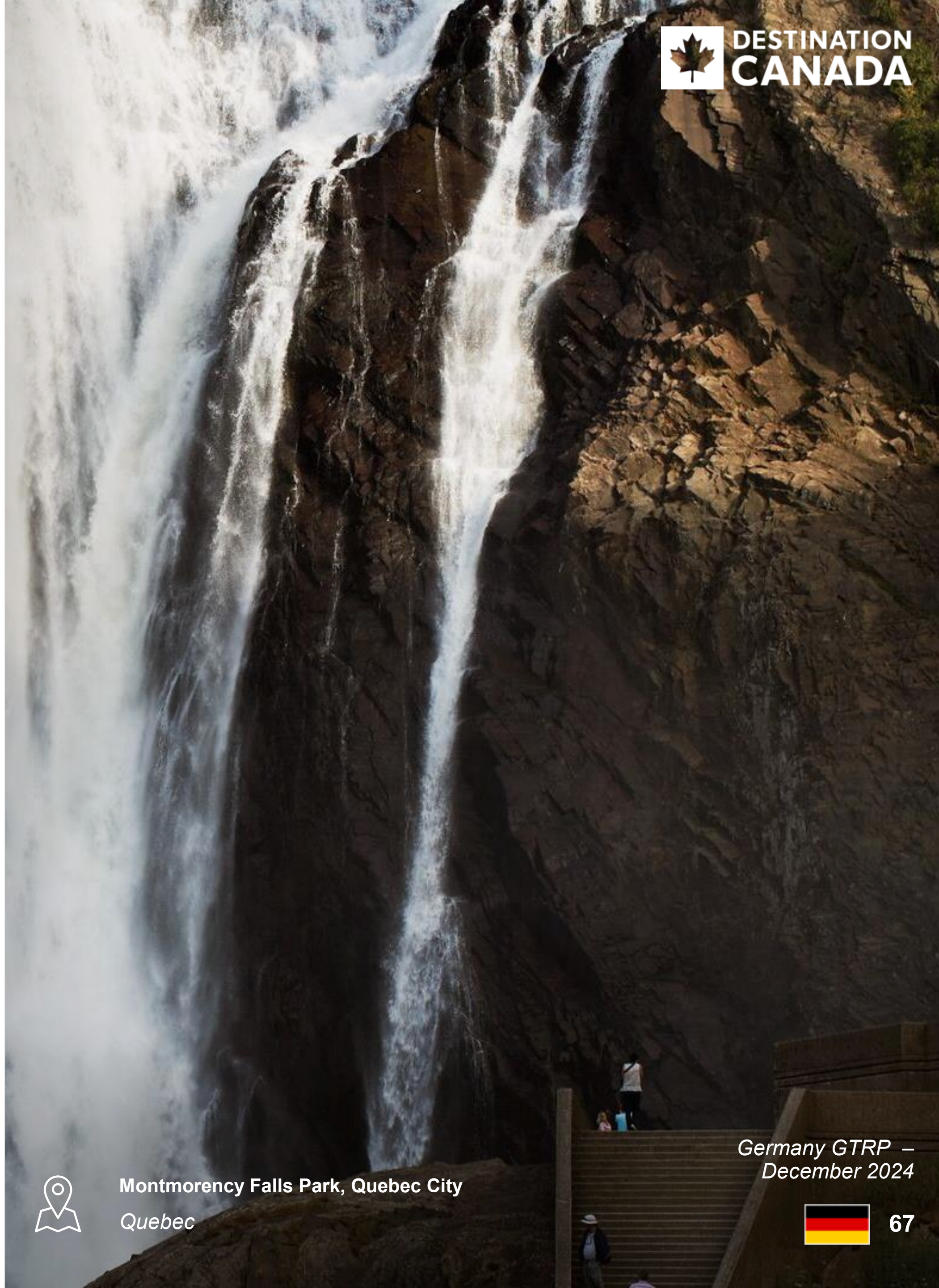
BOOKING FLIGHTS FOR RECENT TRIP: BY DESTINATION

Booking flights through a travel agent or directly with the airline are slightly, though not significantly, higher for trips to Canada.



+ / − = significantly higher/lower result (Travellers to Canada vs. Any Destination (excl. CA))

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



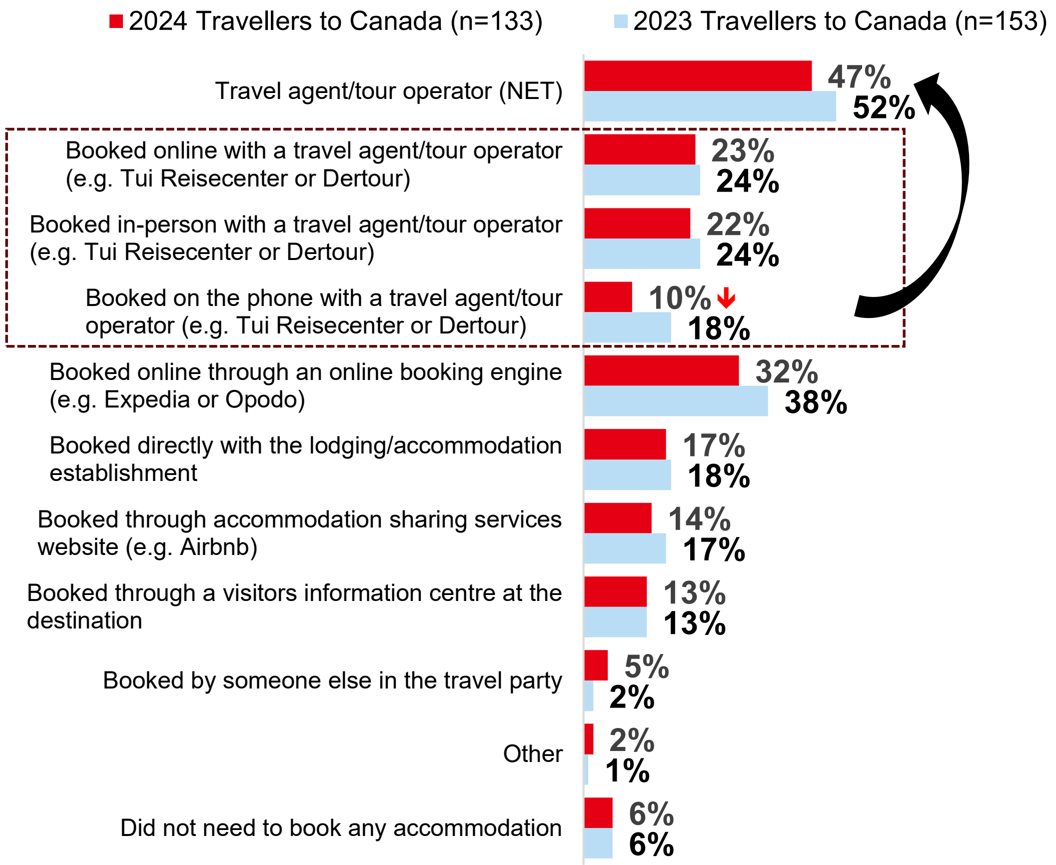
Montmorency Falls Park, Quebec City
Quebec

BOOKING ACCOMMODATIONS FOR RECENT TRIP

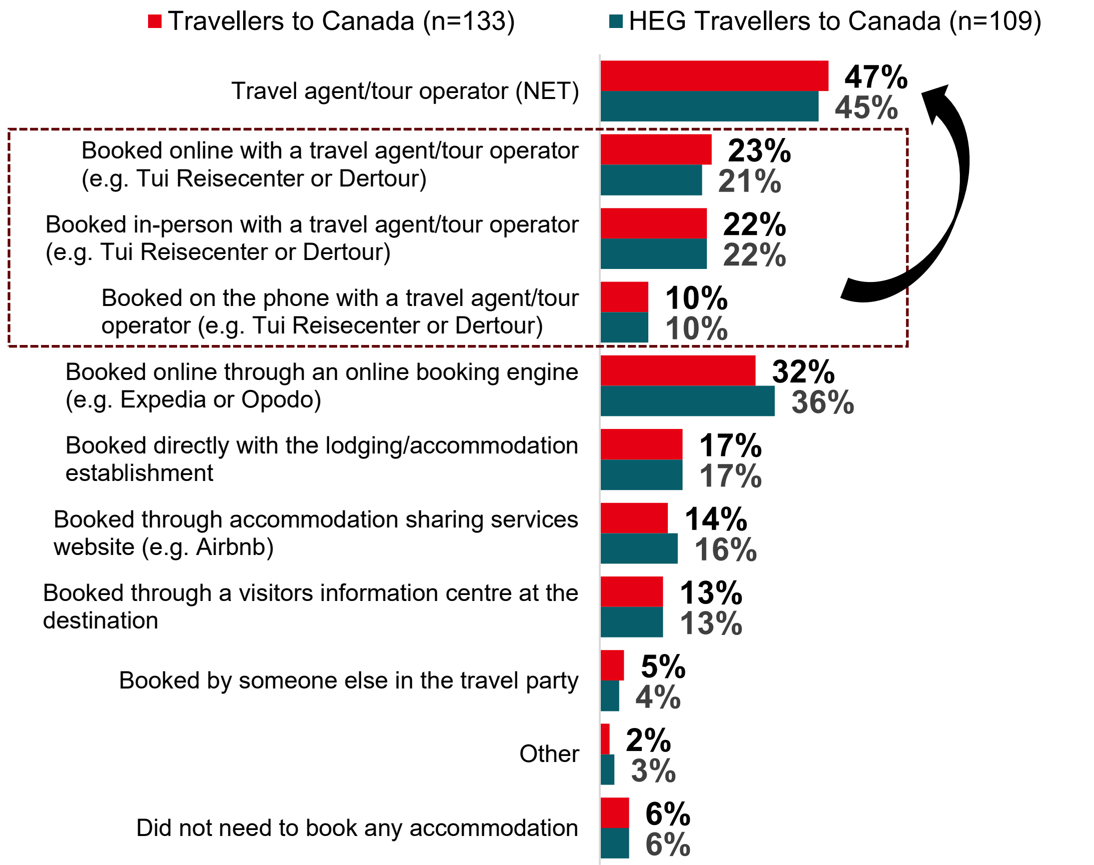
DESTINATION CANADA

Travel agents/tour operators are used most for booking accommodations. Approximately one-third booked their accommodations through an online booking engine.

Total Travellers to Canada: Trended



Total Travellers to Canada vs. HEG Travellers to Canada



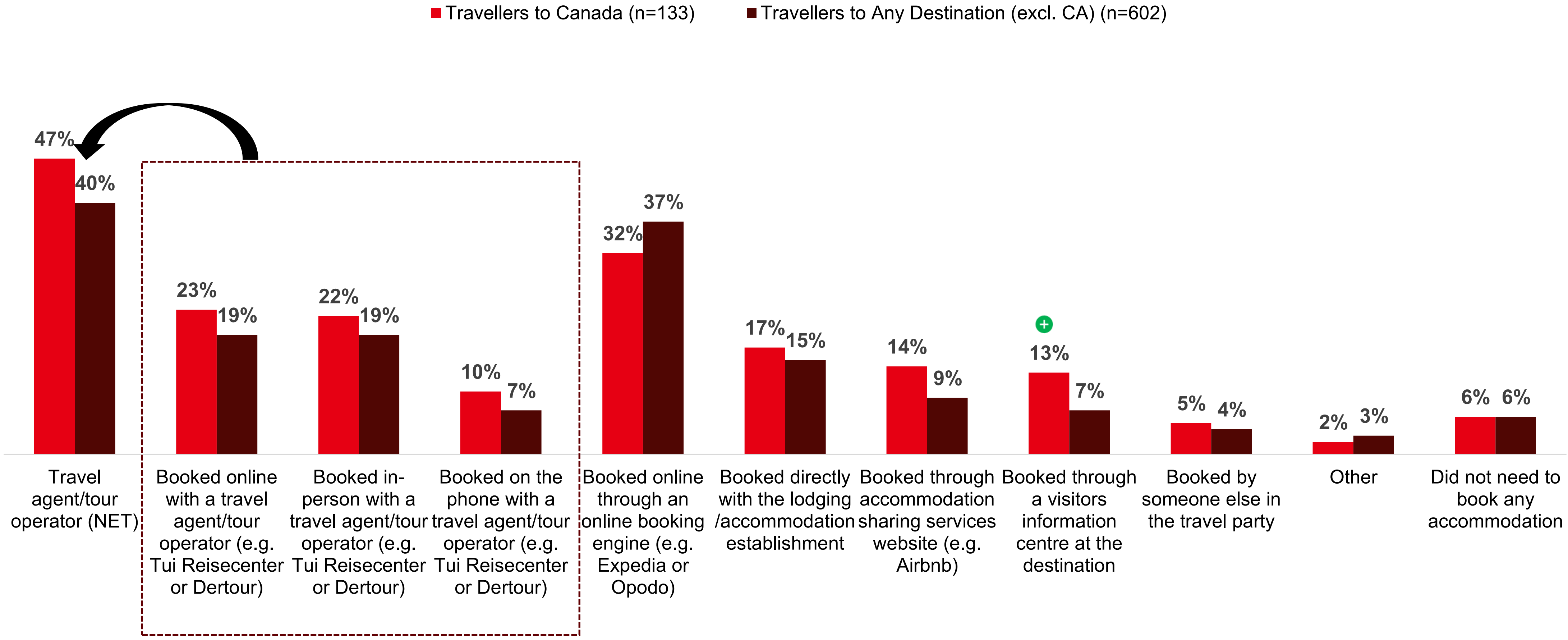
↑ / ↓ = significantly higher/lower result (2024 vs. 2023)

\+ / − = significantly higher/lower result (HEG vs. 2024 Total)

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

BOOKING ACCOMMODATIONS FOR RECENT TRIP: BY DESTINATION

Similar to their flights, travellers to Canada were slightly (though not significantly) more likely to book accommodations via a travel agent. Those who didn't likely used an online booking agent. Of note is the 13% who booked through a visitor info center.



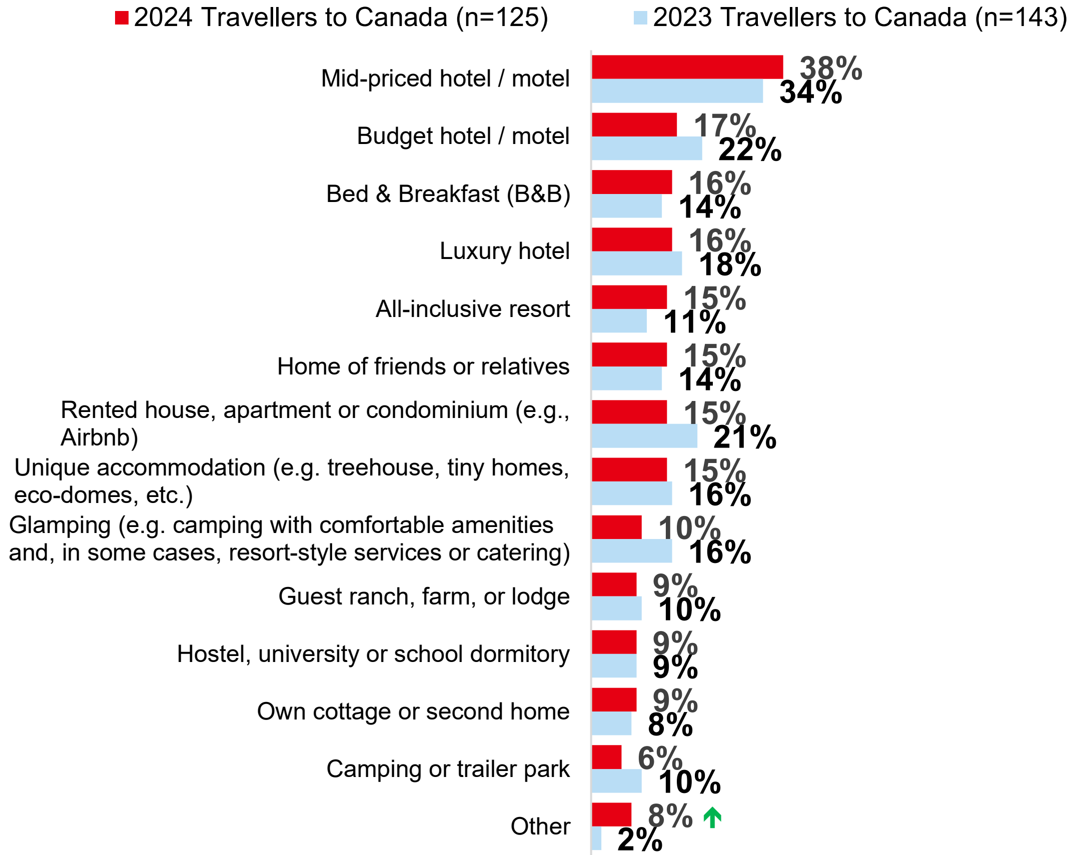
+ / – = significantly higher/lower result (Travellers to Canada vs. Any Destination (excl. CA))

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

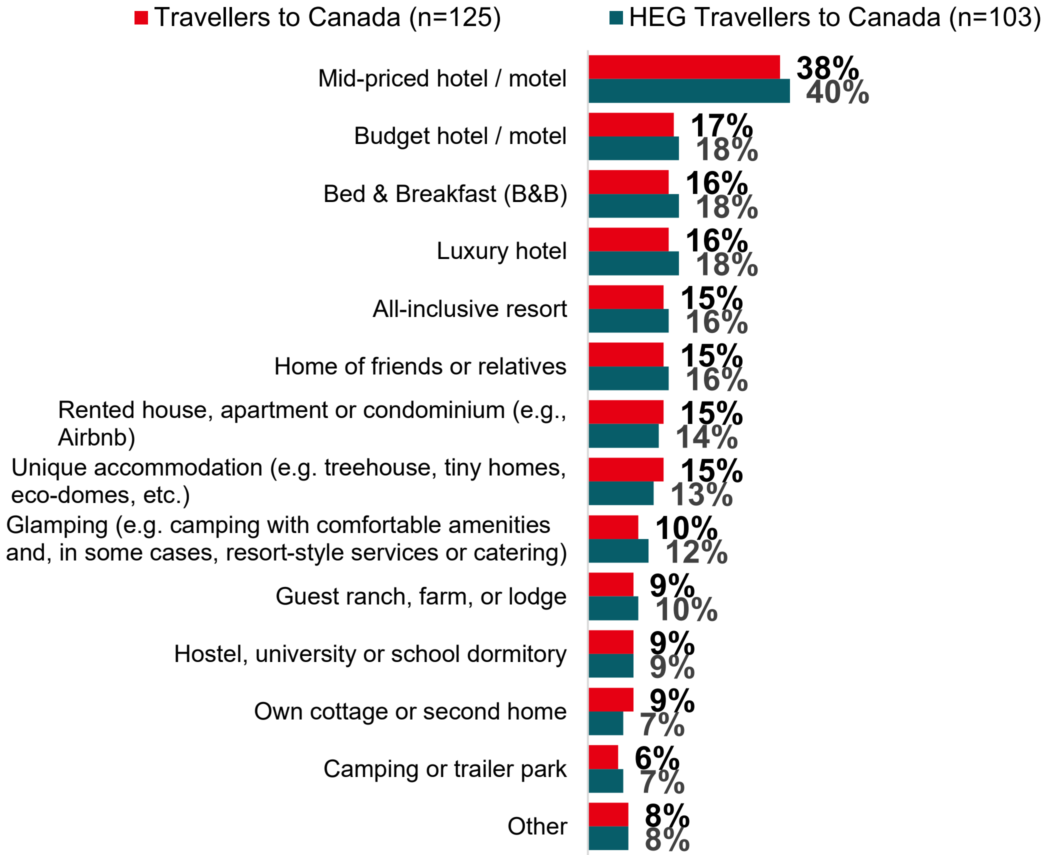
TYPE OF ACCOMMODATIONS FOR RECENT TRIP

Mid-priced hotels/motels are the most common accommodations among both Total Travellers and HEGs.

Total Travellers to Canada: Trended



Total Travellers to Canada vs. HEG Travellers to Canada



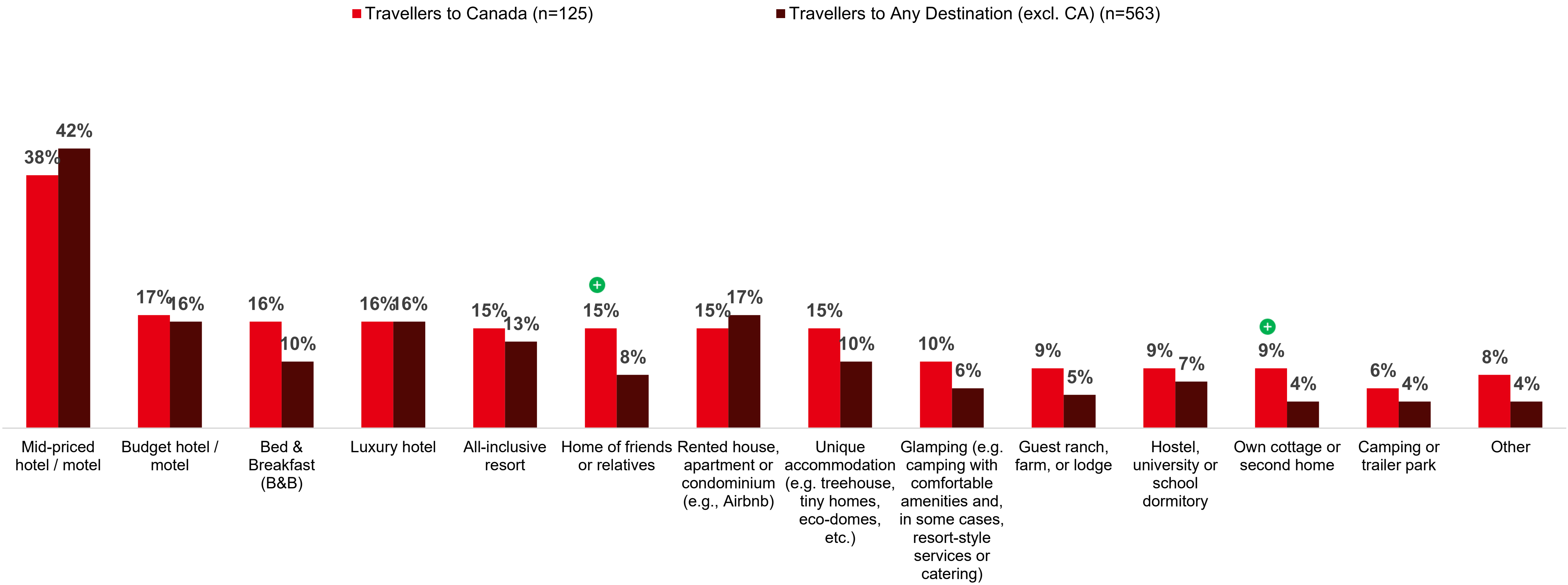
↑ / ↓ = significantly higher/lower result (2024 vs. 2023)

+ / − = significantly higher/lower result (HEG vs. 2024 Total)

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

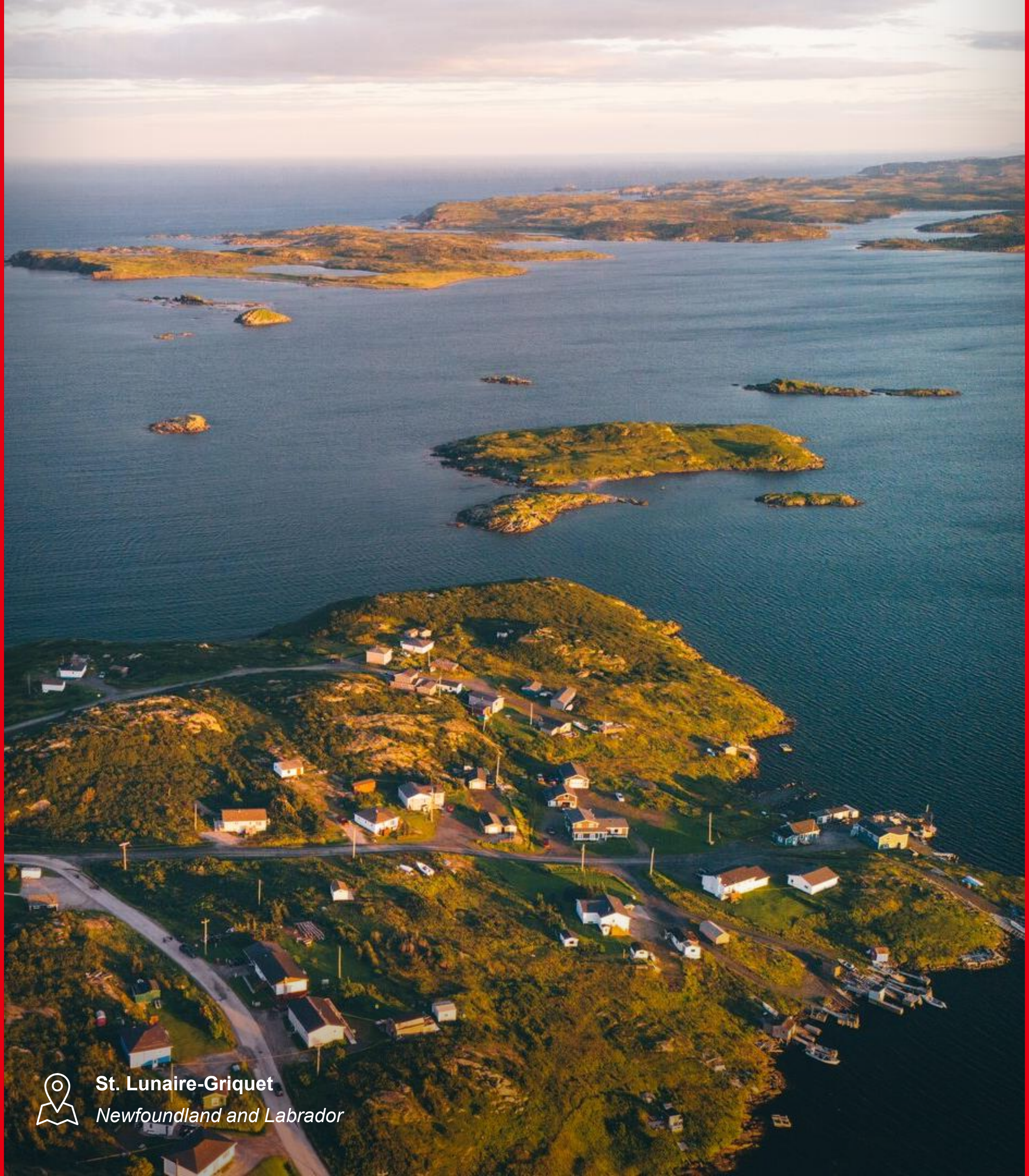
TYPE OF ACCOMMODATIONS FOR RECENT TRIP: BY DESTINATION

The use of mid-priced hotels for Canada trips is similar to other destinations. Of note is the higher number of travellers to Canada who stayed either at the home of friends/relatives or their own cottage/second home.



+ / – = significantly higher/lower result (Travellers to Canada vs. Any Destination (excl. CA))

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


St. Lunaire-Griquet
Newfoundland and Labrador

RECENT TRIP TO CANADA

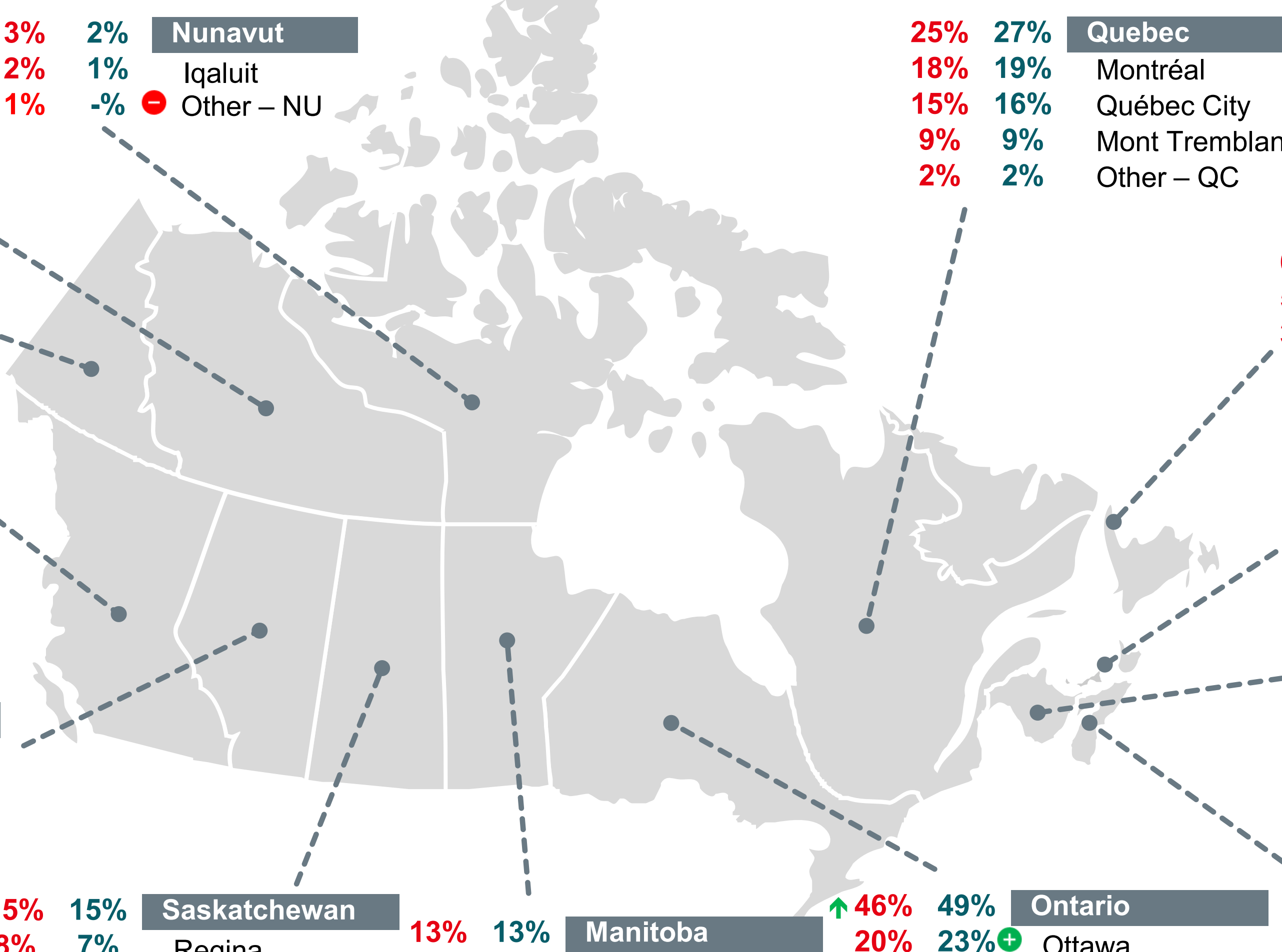
CANADIAN DESTINATIONS VISITED DURING RECENT TRIP

DESTINATION CANADA

Ontario and British Columbia were the most visited areas among Total Travellers and HEGs. Visits to Ontario were up vs. year ago among Total Travellers.

Total Travellers

Total HEG Travellers



Total Travellers	Total HEG Travellers	Northwest Territories
3%	3%	Northwest Territories
2%	3%	Yellowknife
-%	-%	Inuvik
2%	2%	Other – NWT

Total Travellers	Total HEG Travellers	Nunavut
3%	2%	Nunavut
2%	1%	Iqaluit
1%	-% −	Other – NU

Total Travellers	Total HEG Travellers	Quebec
25%	27%	Quebec
18%	19%	Montréal
15%	16%	Québec City
9%	9%	Mont Tremblant
2%	2%	Other – QC

Total Travellers	Total HEG Travellers	Yukon
7%	7%	Yukon
4%	4%	Whitehorse
4%	4%	Dawson City
3%	4%	Other – YT

Total Travellers	Total HEG Travellers	Newfoundland & Labrador
6%	7%	Newfoundland & Labrador
5%	6%	St. John's
3%	4%	Other - NL

Total Travellers	Total HEG Travellers	British Columbia
43%	41%	British Columbia
22%	22%	Rocky Mountains
30%	28%	Vancouver
19%	18%	Victoria
11%	12%	Whistler
8%	7%	Okanagan
2%	3%	Other – BC

Total Travellers	Total HEG Travellers	Prince Edward Island
6%	7%	Prince Edward Island
5%	6%	Charlottetown
3%	4%	Other - PEI

Total Travellers	Total HEG Travellers	New Brunswick
7%	7%	New Brunswick
5%	5%	Fredericton
2%	3%	Saint John
1%	1%	Other - NB

Total Travellers	Total HEG Travellers	Alberta
26%	24%	Alberta
16%	15%	Rocky Mountains
15%	13%	Calgary
8%	6%	Edmonton
15%	16%	Banff
15%	15%	Jasper
1%	1%	Other – AB

Total Travellers	Total HEG Travellers	Nova Scotia
9%	11%	Nova Scotia
7%	8%	Halifax
3%	4%	Cape Breton
2%	3%	Other - NS

Total Travellers	Total HEG Travellers	Saskatchewan
15%	15%	Saskatchewan
8%	7%	Regina
8%	9%	Saskatoon
3%	4%	Other – SK

Total Travellers	Total HEG Travellers	Manitoba
13%	13%	Manitoba
8%	8%	Winnipeg
8%	8%	Churchill
2%	3%	Other – MB

Total Travellers	Total HEG Travellers	Ontario
↑ 46%	49%	Ontario
20%	23% +	Ottawa
29%	30%	Niagara Falls
34%	35%	Toronto
5%	6%	Muskoka
9%	9%	Other – ON

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to Canada (n=133); HEG (n=109)
F17. Which of the following Canadian provinces or territories did you visit on this trip? (Select all that apply)
F18a-m. Within [PROVINCE], which travel destinations did you visit? (Select all that apply)

↑ / ↓ = significantly higher/lower result (2024 vs. 2023) + / − = significantly higher/lower result (HEG vs. 2024 Total)

CANADIAN DESTINATIONS VISITED DURING RECENT TRIP: BY KEY CANADIAN CITIES VISITED

DESTINATION CANADA

German travellers that recently travelled to Canada visited were most likely to also visit BC, Alberta, Ontario or Quebec on the same trip.

	Canadian Cities Visited on Most Recent Trip				
	Vancouver *(n=84)*	**Calgary** *(n=41*)*	**Toronto** *(n=79)*	**Montreal** *(n=48*)*	**Halifax** *(n=47*)*
British Columbia	*100%*	51%	33%	31%	15%
Alberta	35%	*100%*	18%	29%	33%
Saskatchewan	9%	17%	12%	11%	27%
Manitoba	6%	22%	7%	8%	23%
Ontario	26%	27%	*100%*	56%	38%
Quebec	18%	30%	32%	*100%*	33%
New Brunswick	2%	10%	10%	9%	27%
Nova Scotia	3%	15%	9%	17%	*100%*
Prince Edward Island	1%	7%	6%	6%	15%
Newfoundland & Labrador	2%	10%	7%	15%	30%
Yukon	8%	7%	5%	8%	11%
Northwest Territories	1%	8%	3%	2%	8%
Nunavut	-	3%	-	-	4%

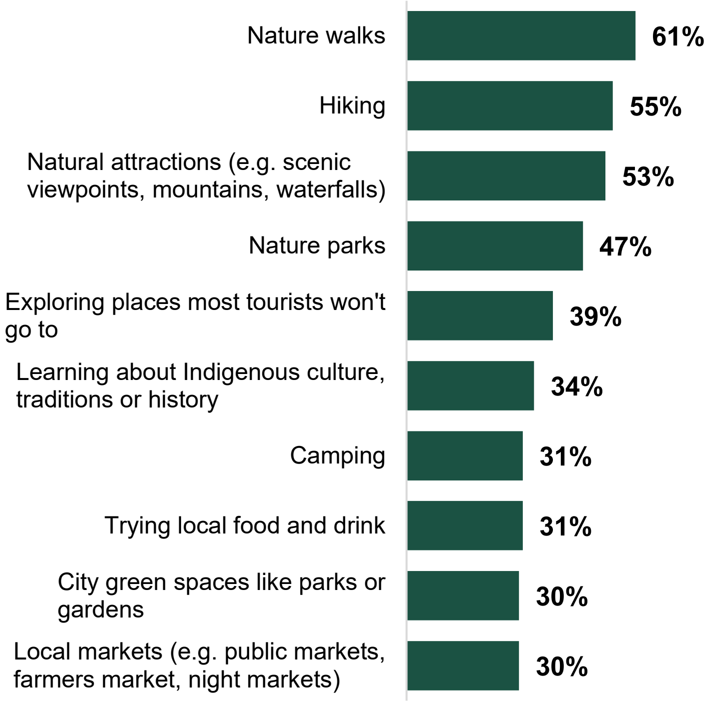
Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to Canada
F17. Which of the following Canadian provinces or territories did you visit on this trip? (Select all that apply)
*Small base size, interpret with caution (n<50)

TOP 10 ACTIVITIES PARTICIPATED IN DURING RECENT TRIP TO CANADA: BY SEGMENT

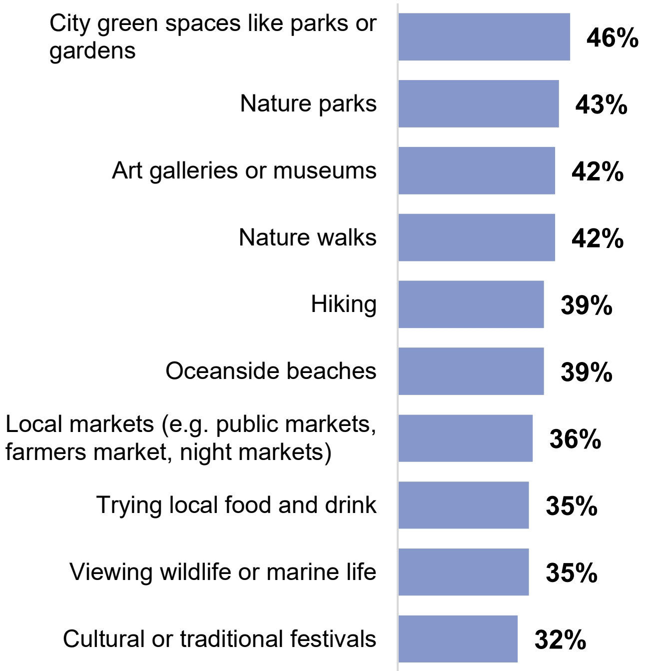
DESTINATION CANADA

Nature-themed activities such as walks, hiking, nature parks and other natural attractions were top activities among both OEs and RGs. City green spaces and art galleries/museums were more popular among CSs.

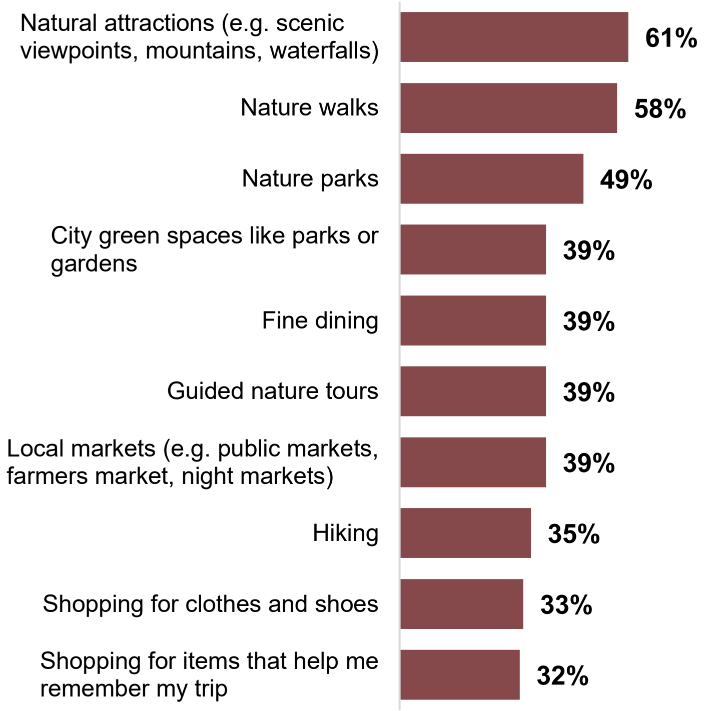
Outdoor Explorers
(n=36*)



Culture Seekers
(n=28*)



Refined Globetrotters
(n=31*)



*Purpose Driven Families base size too small to report (n=14**)*

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to Canada
F16. Which of the following activities, if any, did you participate in during your recent trip to Canada? (Select all that apply)
*Small base size, interpret with caution (n<50)

THANK YOU

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