

2025 GLOBAL TRAVELLER RESEARCH PROGRAM

GERMANY HIGHLIGHTS REPORT



Canada



Halifax Nova Scotia



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.




Timing of Fieldwork

December 1st – 16th, 2025



Geographical Definition for Qualified Trips

Outside of: Europe, North Africa and the Mediterranean



Sample Distribution

Sample distribution:	National
Total sample size:	1517

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





Consideration for Canada continues to be strong among German travellers, with the next 2-year immediate potential for Canada being 6.3M. The current geopolitical climate is also creating a tailwind, with 30% stating they are more likely to visit Canada as a result.



Potential visitors to Canada are more likely to consider a visit during the summer months, followed by fall, with Ontario and British Columbia accounting for the highest number of potential visitors.



While experiencing local culture is important, German travellers are most likely to base an entire holiday around oceanside beaches and natural attractions. There was an uptick in the number of German travellers who said part of their trip involved an organized group.



Canada is becoming more top of mind as an Indigenous tourism destination among German travellers. There is strong interest among German travellers seeking safety and comfort in Indigenous experiences that are set in the natural environment.



While the use of AI is common (especially among younger travellers), travel agents were used more for destination research compared to last year. When it comes to booking both flights and accommodations, online search engines have gained traction.

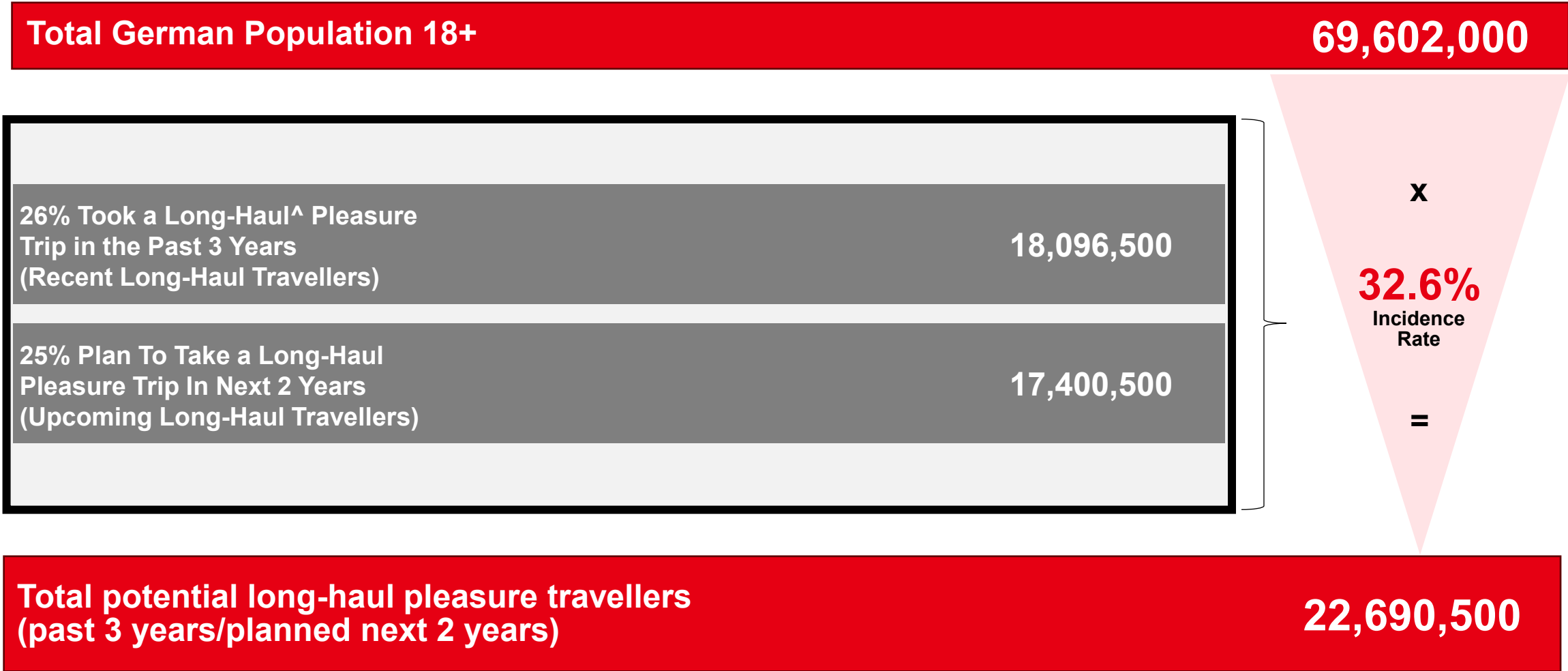
MARKET SIZING



Killarney Provincial Park
Ontario

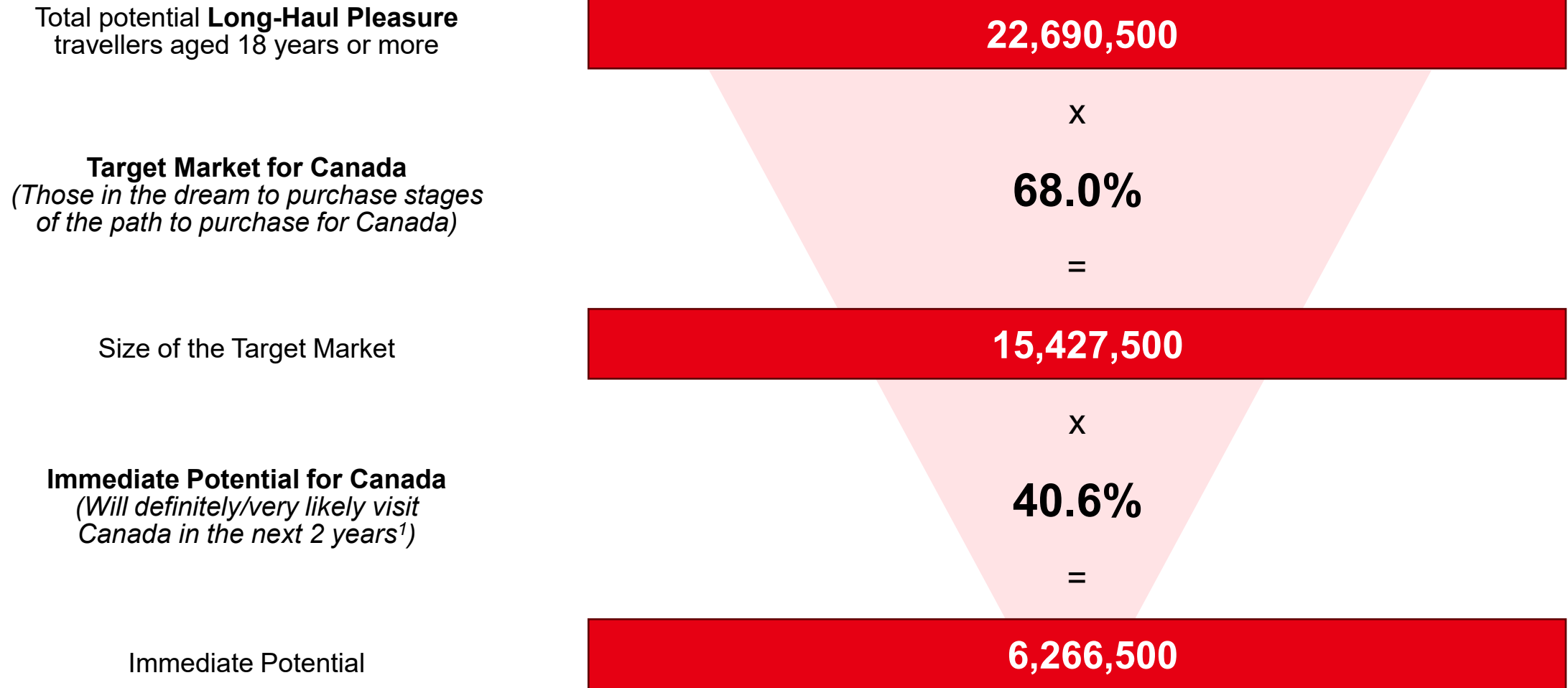


MARKET SIZING – LONG-HAUL TRAVELLERS



[^] 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)



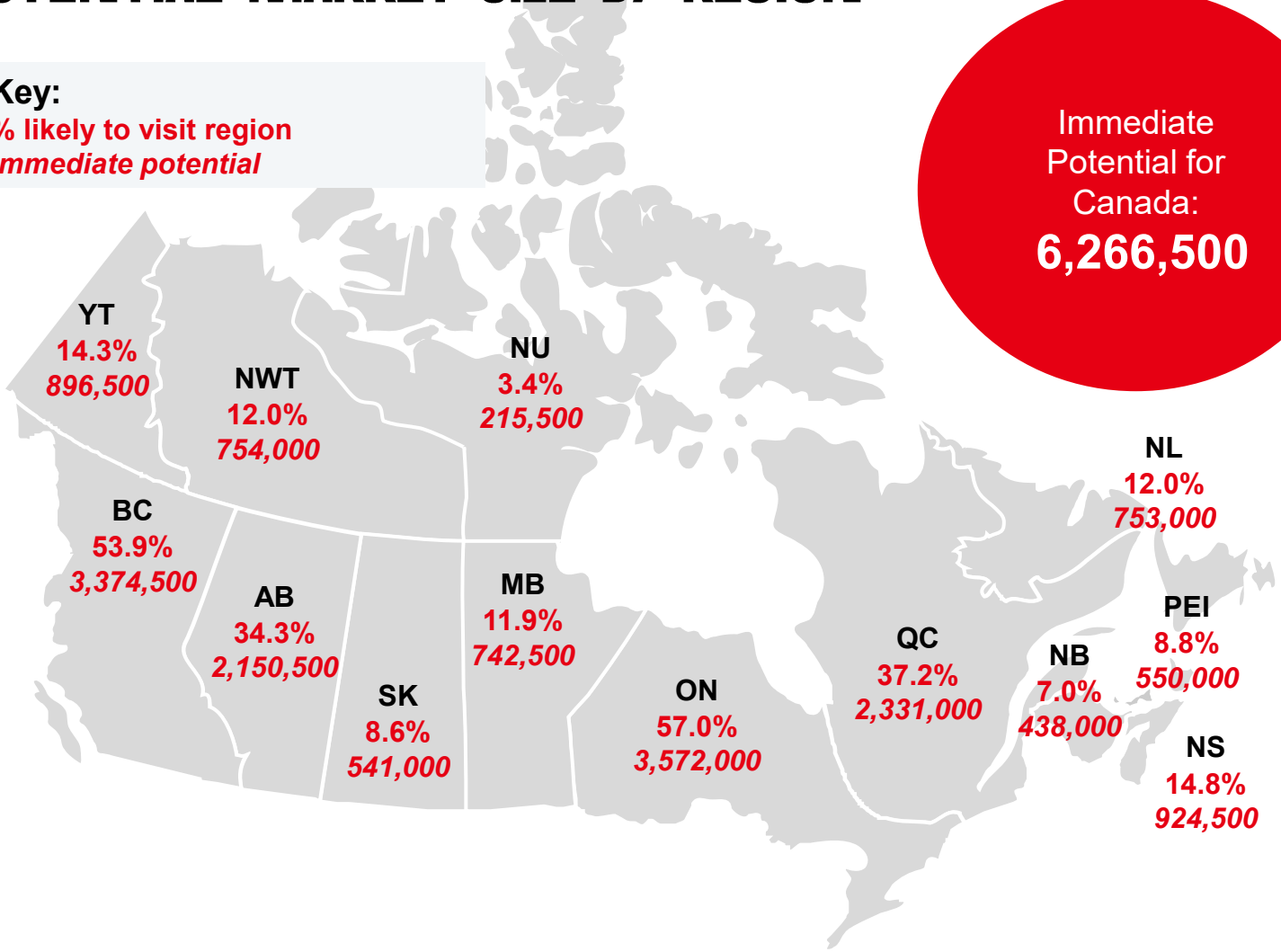
¹ Includes respondents likely to visit Canada for a trip of 1 to 3 nights, or a trip of 4 nights or more.
Base: Target market for Canada = long-haul pleasure travellers (past 3 years or next 2 years) (n=1517); Immediate potential for Canada = dream to purchase stages for P2P for Canada (n=1034)
C1. Which 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

Ontario and BC have the potential to draw in over 3.3 million German travellers each over the next 2 years.

Immediate Potential for Canada:
6,266,500

Key:
% likely to visit region
Immediate potential



Nunavut


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=1034)
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)

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%	17%	28%	23%
Alberta	4%	12%	17%	14%
Saskatchewan	1%	3%	5%	3%
Manitoba	2%	4%	7%	4%
Ontario	6%	17%	30%	23%
Quebec	3%	11%	21%	16%
New Brunswick	1%	3%	4%	3%
Nova Scotia	1%	5%	8%	7%
Prince Edward Island	1%	4%	6%	3%
Newfoundland & Labrador	1%	4%	6%	5%
Yukon	2%	4%	8%	6%
Northwest Territories	1%	4%	7%	4%
Nunavut	1%	1%	2%	1%

German travellers show the strongest interest in summer and fall, with Ontario and BC being the top destinations for both seasons.



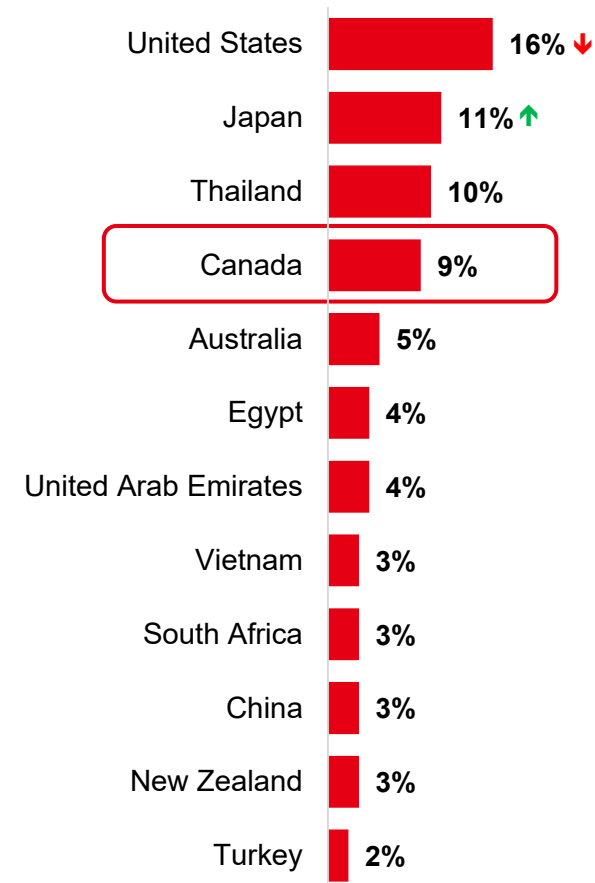
 Whitehorse
Yukon

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December 2025

CONSIDERING CANADA AS A TRAVEL DESTINATION

UNAIDED DESTINATION CONSIDERATION (NEXT 2 YEARS)¹

On an unaided basis, Canada ranks fourth as a destination German travellers are considering, behind the US, Japan, and Thailand. Scores for Canada have remained stable compared to last year, while consideration for the US has declined significantly.

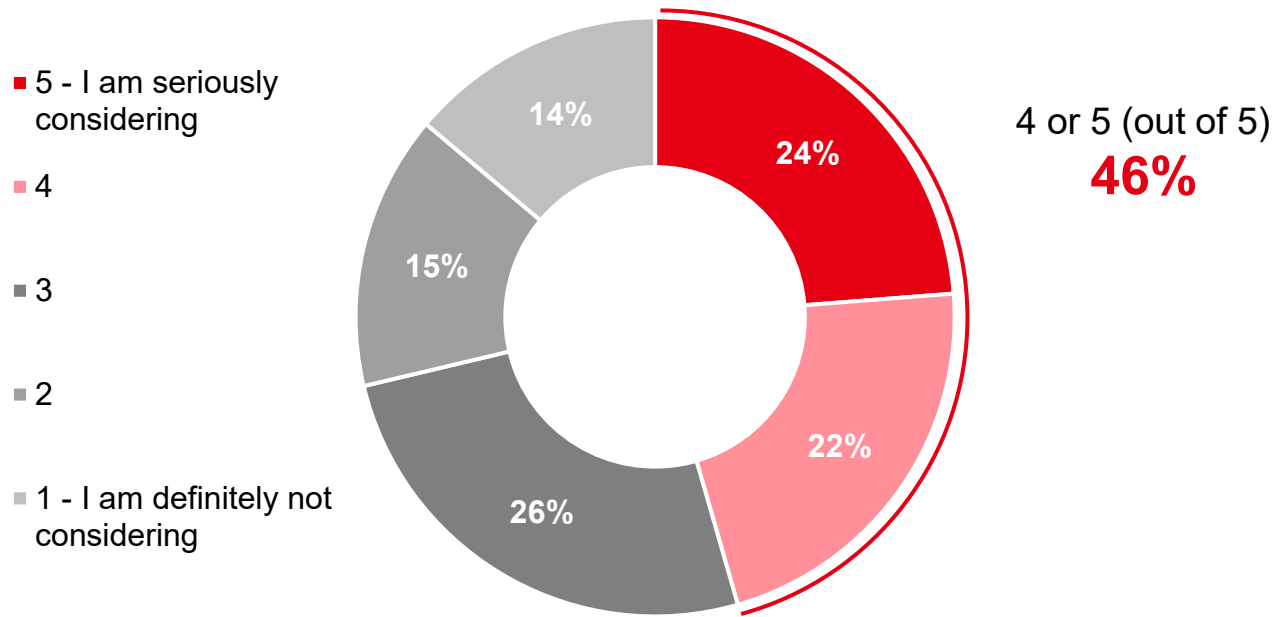


¹ Roll-up of brand mentions by country (e.g., percentage who said "Canada" or any destination in Canada).
Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1517)
B1. You mentioned that you are likely to take long-haul holiday trip in the next 2 years. Which destinations are you seriously considering? (Please list up to 3 destinations)

↑ / ↓ = significantly higher/lower result (2025 vs. 2024)



AIDED CONSIDERATION FOR CANADA (NEXT 2 YEARS)



Over four in ten German travellers would consider visiting Canada in the next 2 years.

↑ / ↓ = significantly higher/lower result (2025 vs. 2024)

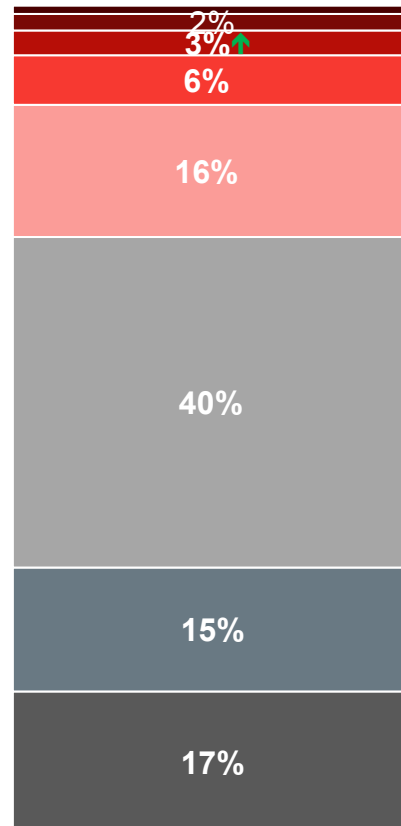
Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1517)
C2. You may have already mentioned this before, but would you consider visiting each of the following destinations in the next 2 years?
Please use a 5-point scale where 1 means 'I am definitely not considering' and 5 means 'I am seriously considering'.

Germany GTRP
December 2025



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 **12%↑**

↑ / ↓ = significantly higher/lower result (2025 vs. 2024)

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=1517)
 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)

Over one in ten German travellers are actively planning a trip to Canada, significantly increasing compared to 2024.



Lake Louise
Alberta

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December 2025



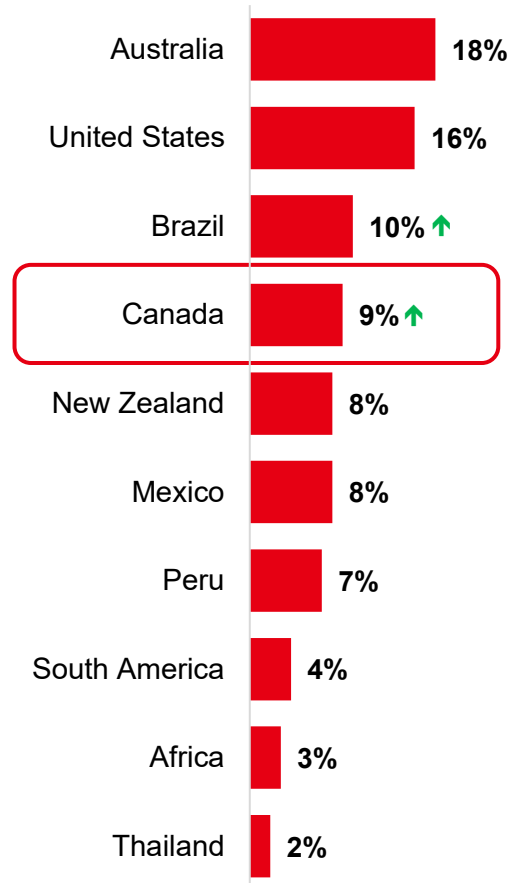
INDIGENOUS TRAVEL



Carcross
Yukon



UNAIDED INDIGENOUS DESTINATION



↑ / ↓ = significantly higher/lower result (2025 vs. 2024)

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1517)

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, with significantly more mentions compared to a year ago.



Manitoulin Island
Ontario

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December 2025



INTEREST IN CANADA AS AN INDIGENOUS DESTINATION

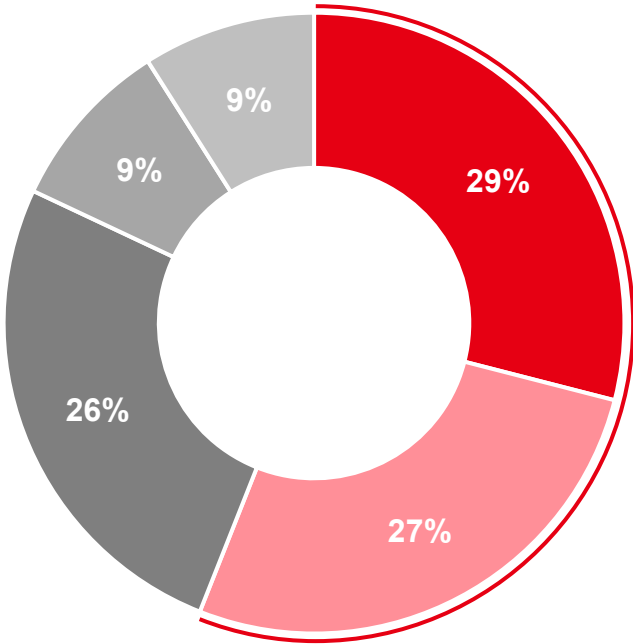


Almost six in ten German travellers are interested in participating in Indigenous experiences in Canada, with nearly three in ten being very interested.



Kelowna
British Columbia

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



4 or 5 (out of 5)
57%

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=787)
 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?
 ↑ / ↓ = significantly higher/lower result (2025 vs. 2024)



FACTORS TO DRIVE INTEREST IN INDIGENOUS CULTURAL EXPERIENCES

Interest in Indigenous cultural experiences is driven by natural settings, safety and comfort, though overall interest across factors has declined year over year.



Victoria
British Columbia

**New statement added in 2025
 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=730)
 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

FARINE
FIVE ROSES



Montreal
Quebec



TOP 10 TRIP ANCHORS ACTIVITIES

34%

Oceanside Beaches

26%

Natural Attractions

18%

Nature Walks

17%

Northern Lights

16%

Historical, Archaeological or World Heritage Sites

15%

Travelling to Remote Destinations

15%

Hiking

15%

Nature Parks

15%

Viewing Wildlife or Marine Life

14%

Trying Local Food and Drink

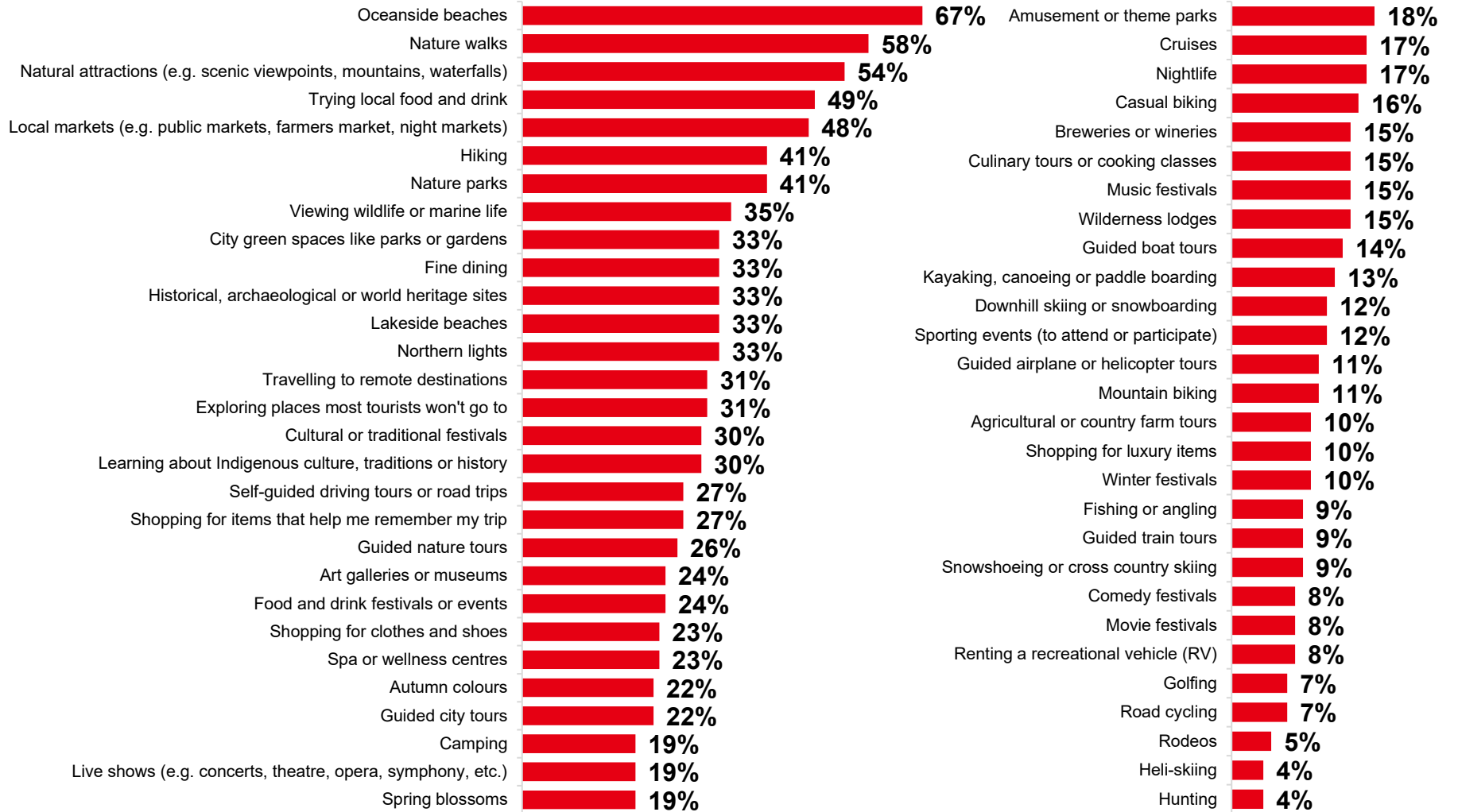


German travellers are most likely to base an entire holiday around oceanside beaches and natural attractions.



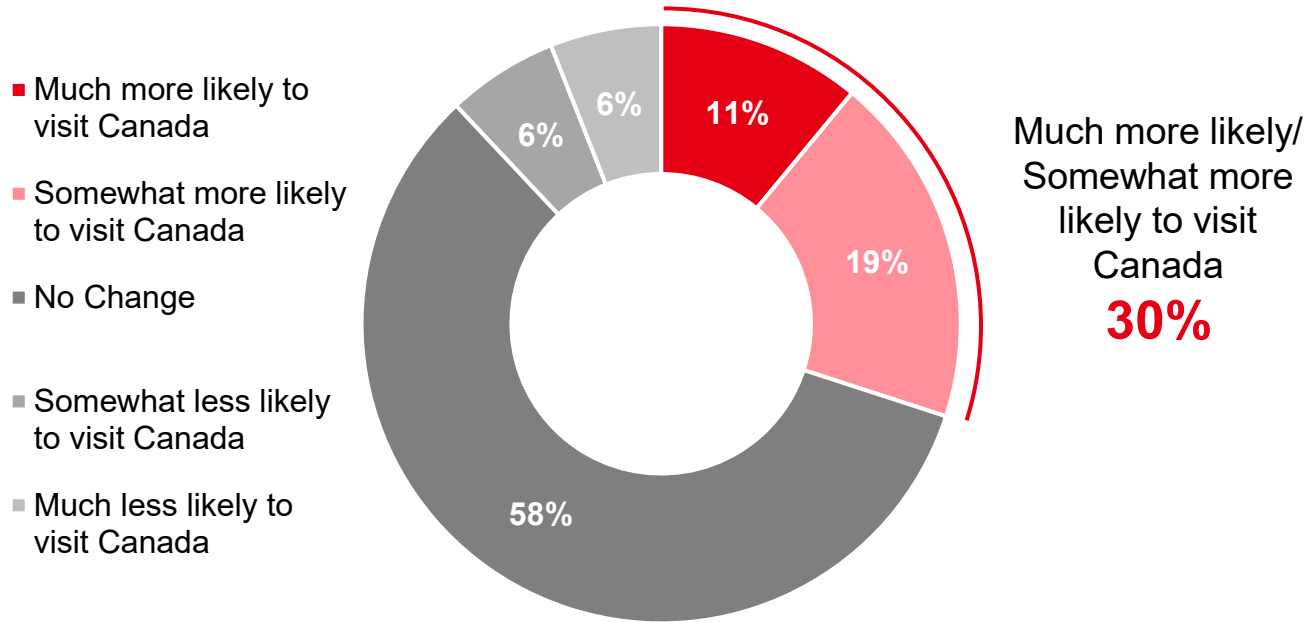
GENERAL ACTIVITIES INTERESTED IN (FULL LIST)

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=1517)
 D4. In general, what activities or places are you interested in while on holiday? (Select all that apply)

STATED IMPACT OF GEOPOLITICAL CLIMATE ON VISITING CANADA



Three in ten German travellers say the geopolitical climate increases their likelihood to visit Canada, including one in ten who are much more likely to visit.



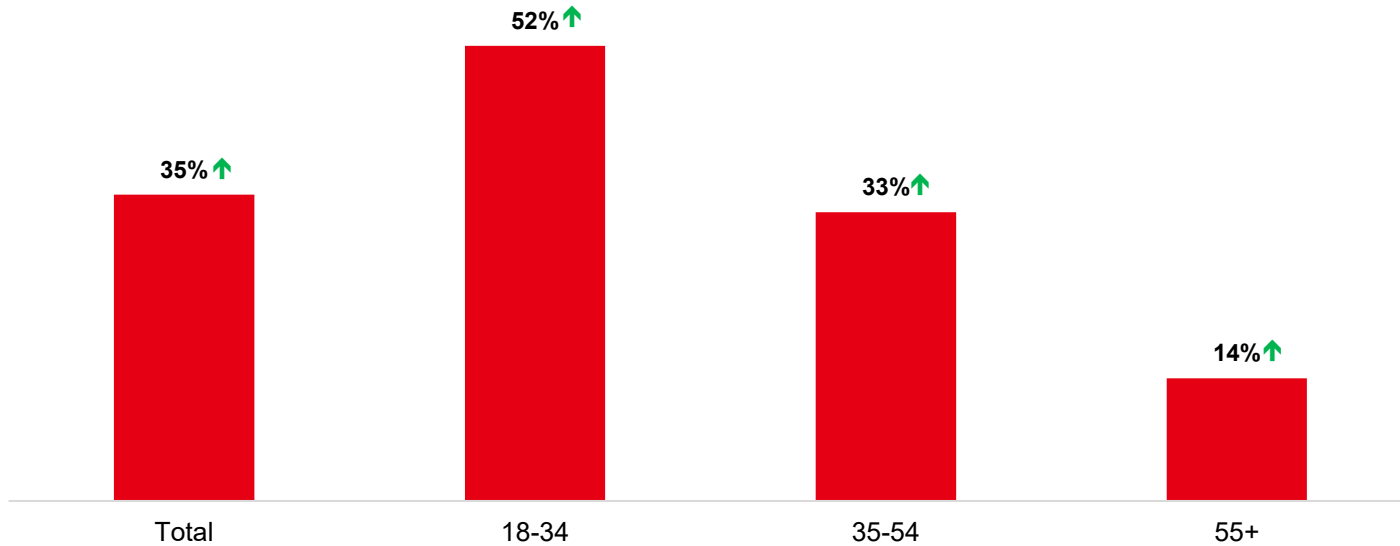
Geopolitical Climate Description

Geopolitical climate can include factors such as politics, international relations, trade disputes, or global conflicts.

Note: respondents were asked either about decision for which airline to fly with (D18) or stated impact of geopolitical climate on visiting Canada (E16)
 Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=766)
 E16. How does the current geopolitical climate affect your likelihood of visiting Canada?



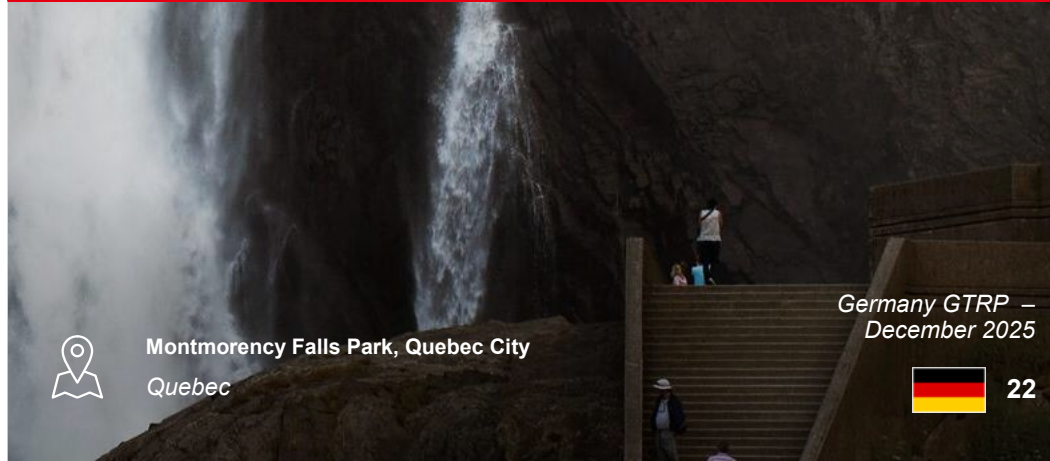
USAGE OF AI TOOLS TO PLAN TRIPS: BY AGE



↑ / ↓ = significantly higher/lower result (2025 vs. 2024)

Note: Question wording was updated in 2025 to include "booking a trip"
 Base: Long-haul pleasure travellers (past 3 years or next 2 years) 2025 (n=1517); 2025 18-34 (n=564); 2025 35-54 (n=529); 2025 55+ (n=424)
 D14. Have you ever used an AI tool (e.g. ChatGPT or Bard) to research, plan or book a trip?

AI usage in travel planning has increased year over year, with over one-third of German travellers using it, rising to over half among 18-34 year olds.



Montmorency Falls Park, Quebec City
 Quebec

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 December 2025



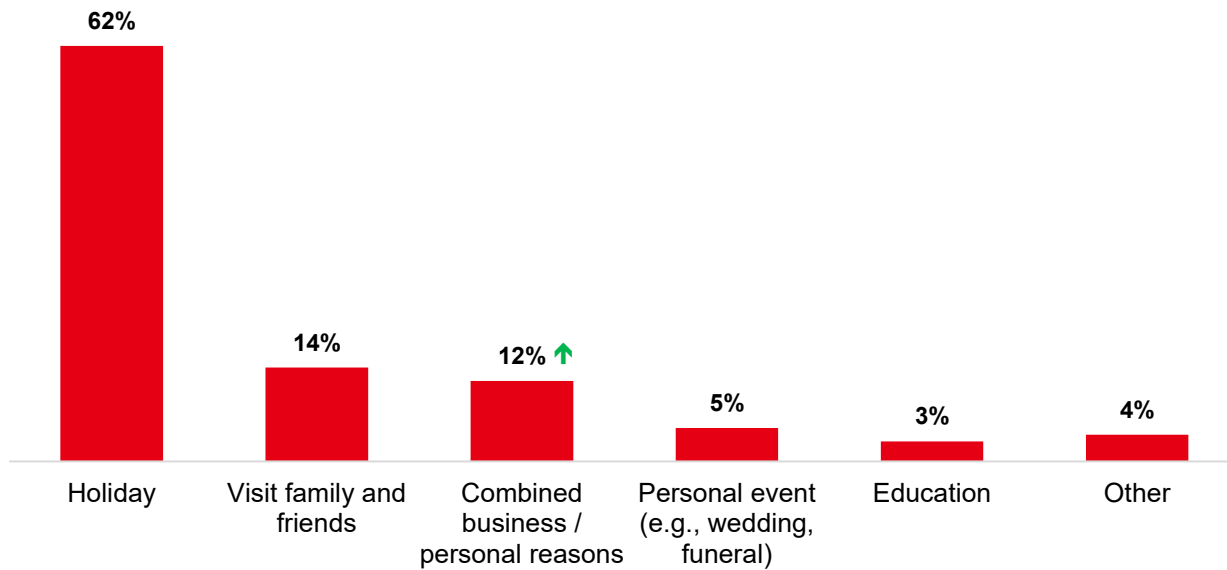
MOST RECENT TRIP TO CANADA



Le Pays de la Sagouine
New Brunswick



MAIN PURPOSE OF RECENT TRIP



↑ / ↓ = significantly higher/lower result (2025 vs. 2024)

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to Canada past 3 years (n=205)
 F2. What was the main purpose of this trip? (Select one)



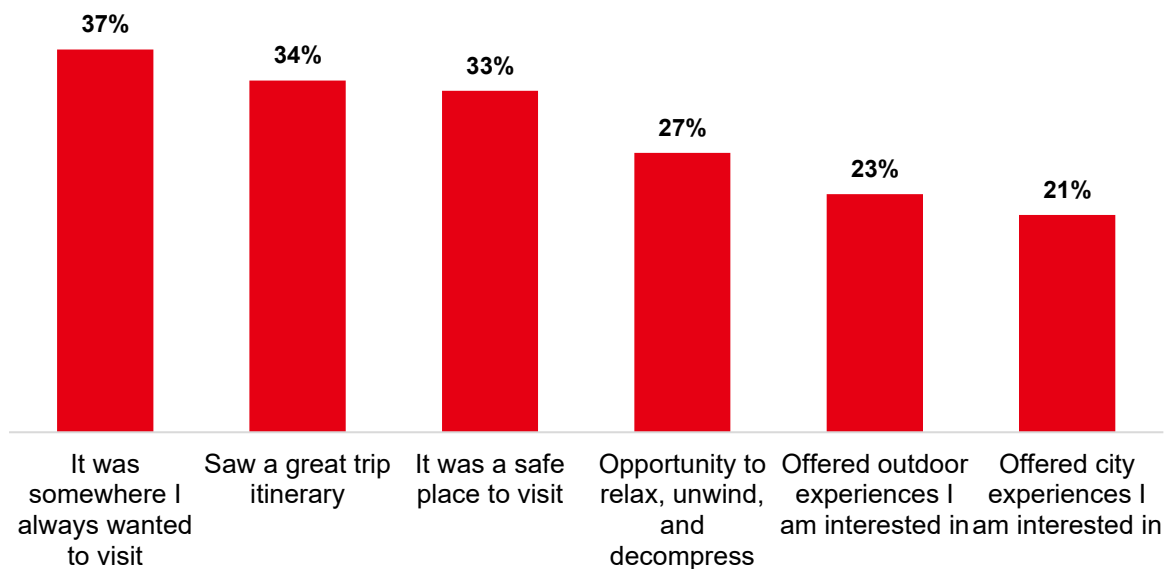
Holidays remain the primary travel purpose for German travellers visiting Canada, while combined business and leisure trips have increased year over year.



Nahanni National Park Reserves
 Northwest Territories

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 December 2025

FACTORS IN CHOOSING DESTINATION FOR RECENT TRIP (TOP 6)



German travellers are drawn to Canada for its aspirational appeal, strong itineraries, and reputation as a safe destination.

↑ / ↓ = significantly higher/lower result (2025 vs. 2024)

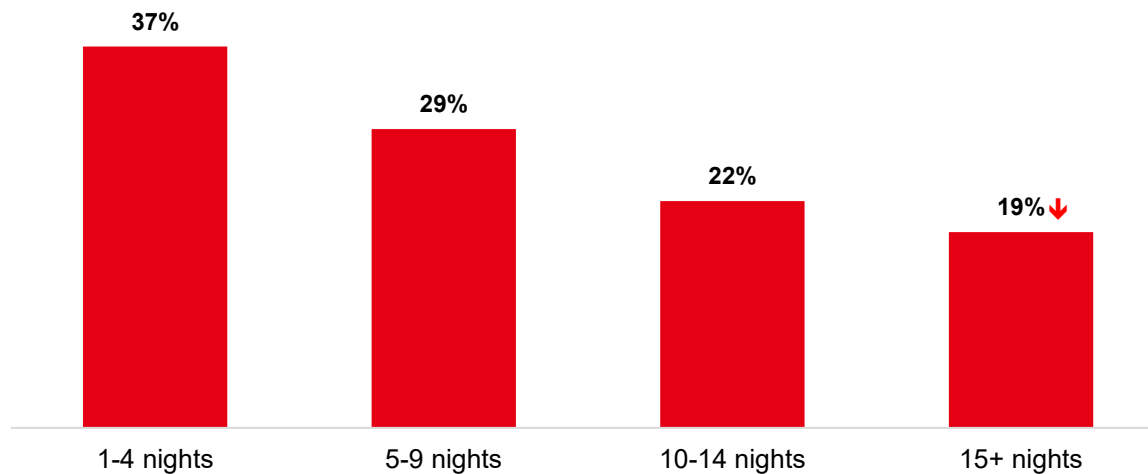
Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to Canada past 3 years, Took a holiday (n=126)
F3. Which of the following factored into your choice of destination for this trip? (Select all that apply)



Fundy Trail Provincial Park
New Brunswick

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December 2025

NIGHTS SPENT DURING RECENT TRIP



Trips to Canada longer than two weeks are on the decline with staying up to nine nights still being the most common.

↑ / ↓ = significantly higher/lower result (2025 vs. 2024)

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to Canada past 3 years (n=205)
F4. How many nights did you spend in this destination?



Barren Canyon, Algonquin Park
Ontario

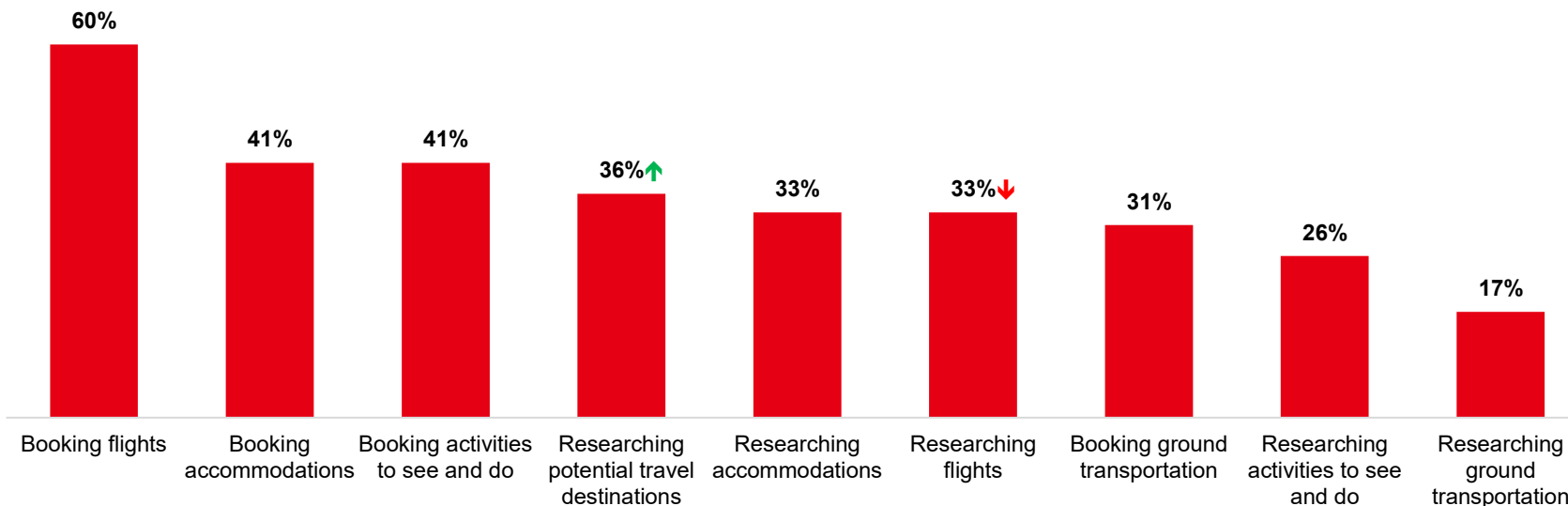
Germany GTRP –
December 2025



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

47% used a travel agent



↑ / ↓ = significantly higher/lower result (2025 vs. 2024)

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to Canada past 3 years (n=205)

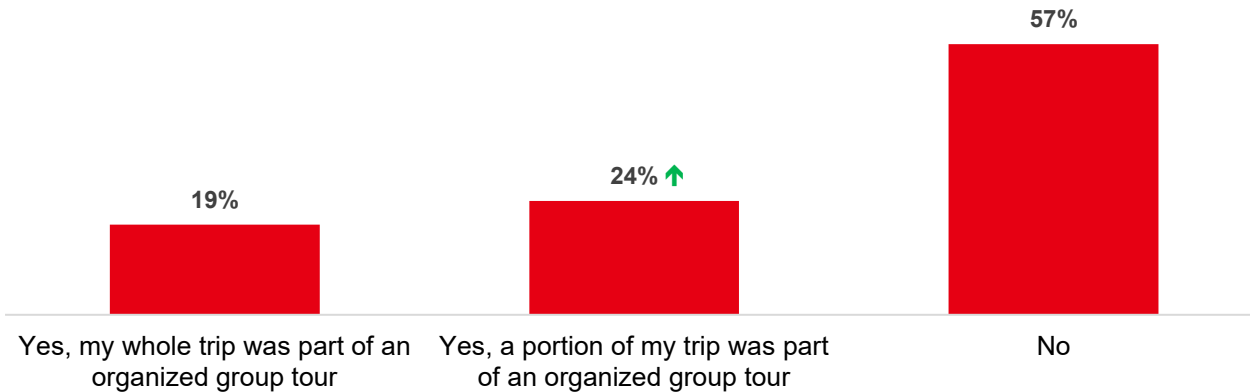
F9. Travel agents offer personalized service to help individuals, groups, and business travellers plan and organize their travel schedules, from purchasing tour packages to booking flights and hotels. Examples of travel agents include Carrefour Voyages or Voyageurs du Monde, they do not include AI Travel Assistants or 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 Canada past 3 years, Used a Travel Agent/Tour Operator (n=97)

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

Nearly half of German travellers to Canada used a travel agent, primarily for booking flights, with increased reliance on agents for destination research compared to last year.

ORGANIZED GROUP TOUR FOR RECENT TRIP



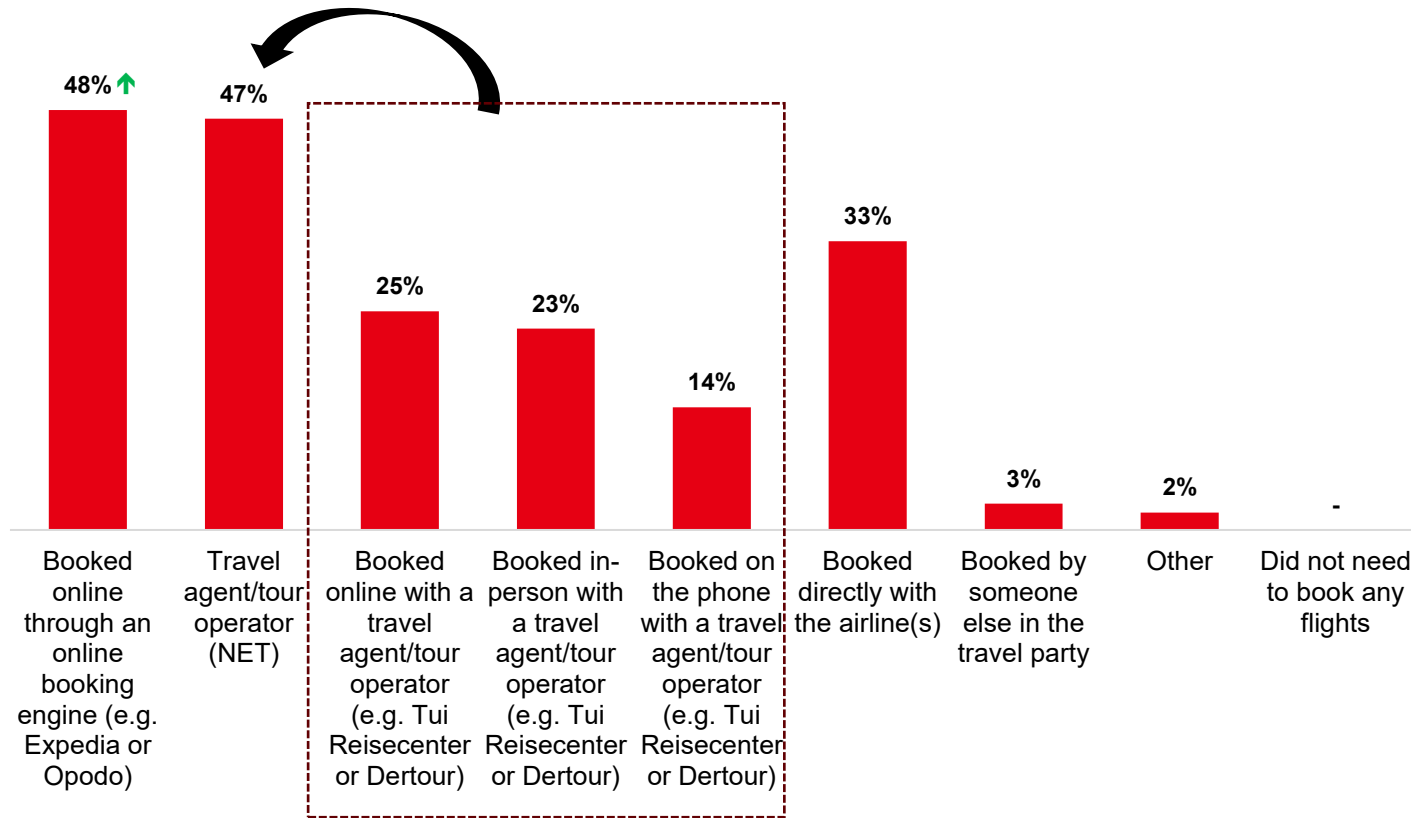
↑ / ↓ = significantly higher/lower result (2025 vs. 2024)

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to Canada past 3 years (n=205) 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?

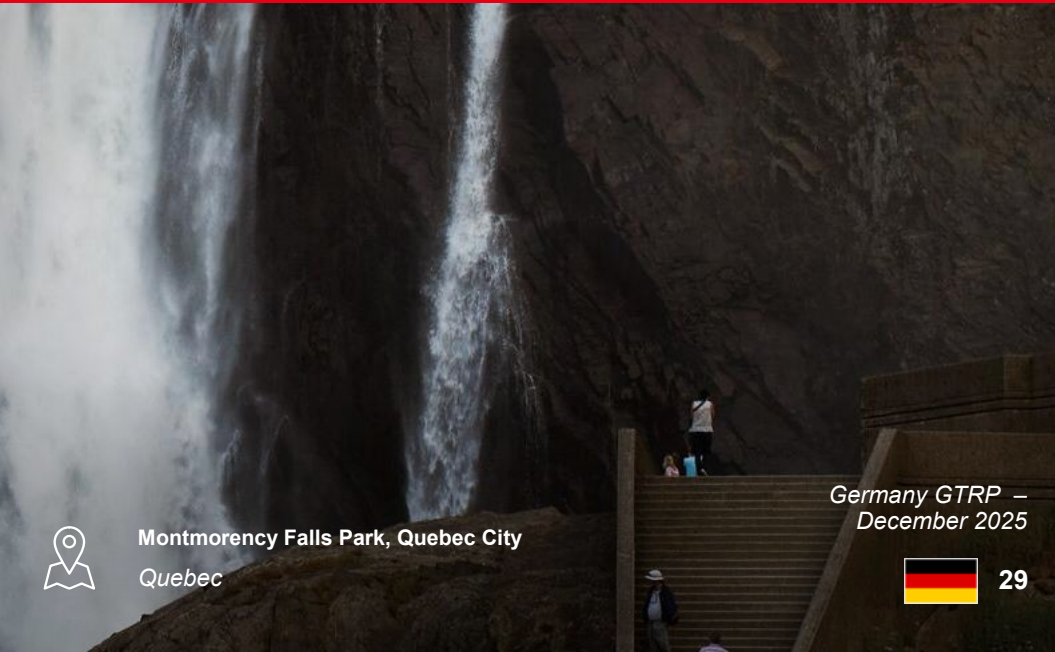


Over four in ten travellers to Canada in the past three years used an organized group tour for at least a portion of their trip, with usage for part of their trip increasing this year.

BOOKING FLIGHTS FOR RECENT TRIP



Online booking engines gained traction for booking flights in 2025 and are now comparable to travel agents among recent German travellers to Canada.



↑ / ↓ = significantly higher/lower result (2025 vs. 2024)

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to Canada past 3 years (n=205) F12. How did you book your flight for this trip? (Select all that apply)

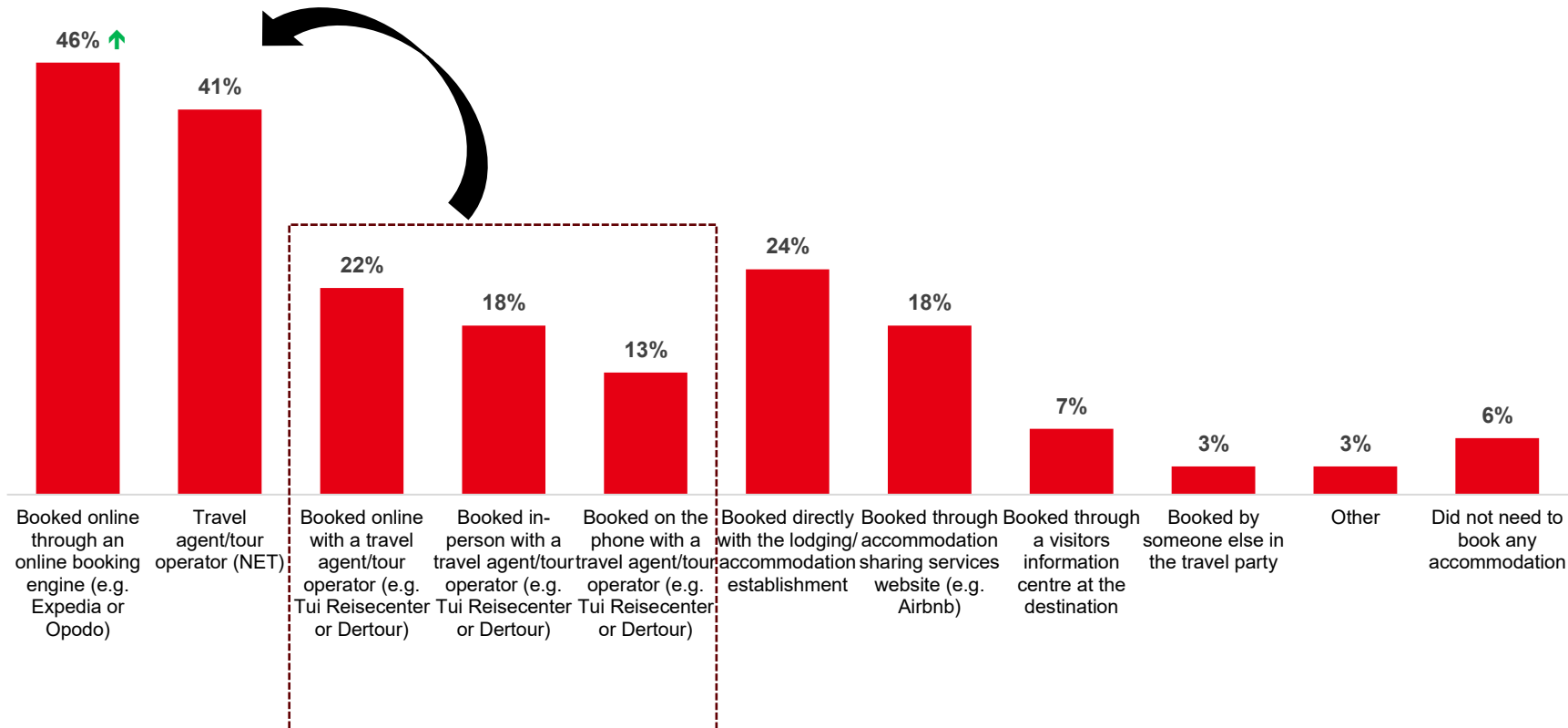


Montmorency Falls Park, Quebec City
Quebec

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BOOKING ACCOMMODATIONS FOR RECENT TRIP

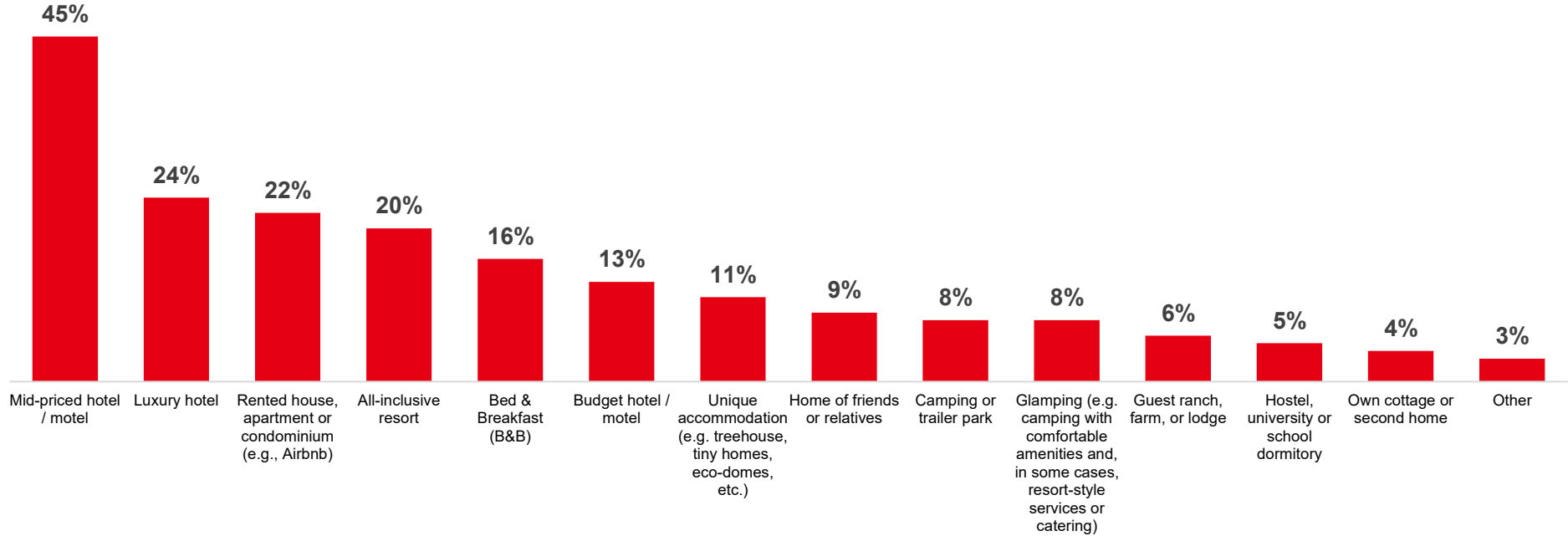


↑ / ↓ = significantly higher/lower result (2025 vs. 2024)

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to Canada past 3 years (n=205)
 F13. How did you book your accommodation for this trip? (Select all that apply)

Like flights, more German travellers to Canada used online booking engines to book their accommodations compared to a year ago.

TYPE OF ACCOMMODATIONS FOR RECENT TRIP

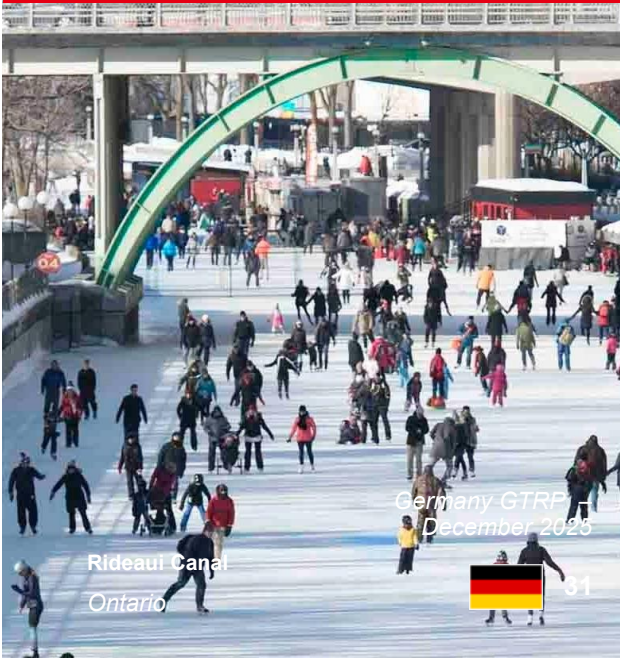


↑ / ↓ = significantly higher/lower result (2025 vs. 2024)

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to Canada past 3 years, Booked Accommodations (n=192)
 F14. Which type of accommodation did you stay in during this trip? (Select all that apply)



German travellers that recently travelled to Canada were most likely to stay in a mid-priced hotel or motel.



Germany GTRF
 December 2026

Rideau Canal
 Ontario



THANK YOU

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

