



5.7 million German long-haul leisure travellers intend to visit Canada in the next two years.

Market Insights



Pent Up Savings

Price consciousness among Germans is increasing due to tightened financial conditions, political uncertainty and a limited supply of goods. Nevertheless, Germans who have been saving will continue to realize their bucket travel list and spend more time and money when travelling.



Values Alignment

Led by government initiatives, there is increasing awareness and attention toward sustainability in Germany. Destinations that offer responsible and mindful travel options will resonate with German travellers.



Great Outdoors

Against the backdrop of COVID, Germans have been drawn to destinations that offer uncrowded spaces. They are also looking for destinations with plenty of outdoor activities, high safety standards and flexible booking options.

Market Potential¹



Canada's target market
12,246,500



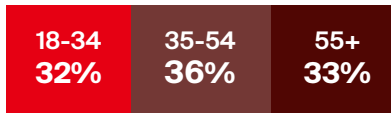
47%
are definitely/very likely to visit
Canada in the next 2 years



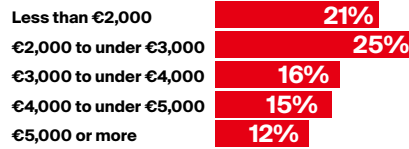
5,694,500
Canada's immediate potential in
the next 2 years

Demographics¹

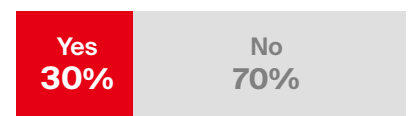
Age



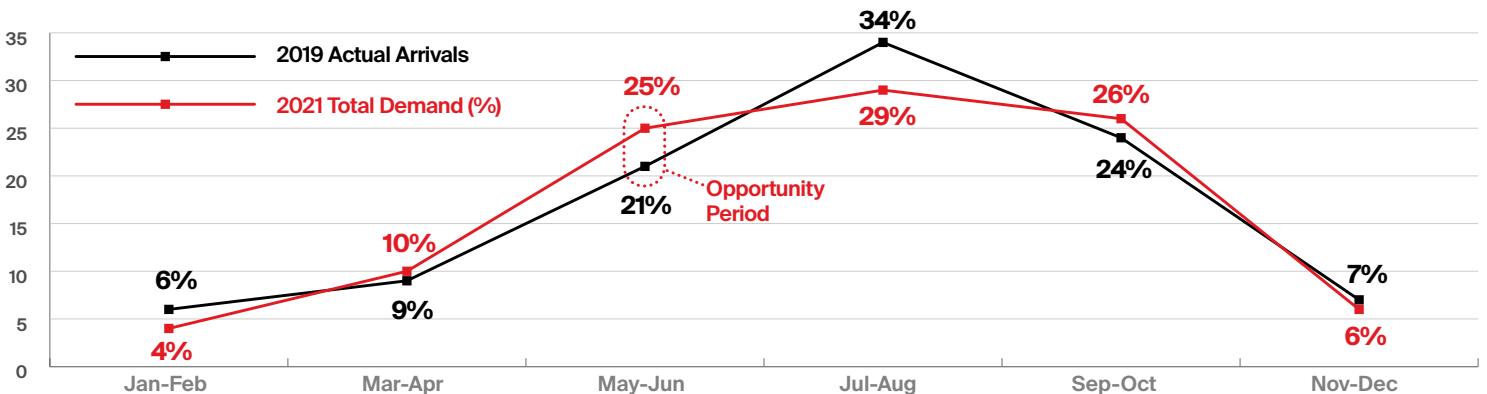
Monthly Household Income



Children



Seasonal Demand^{1,2}

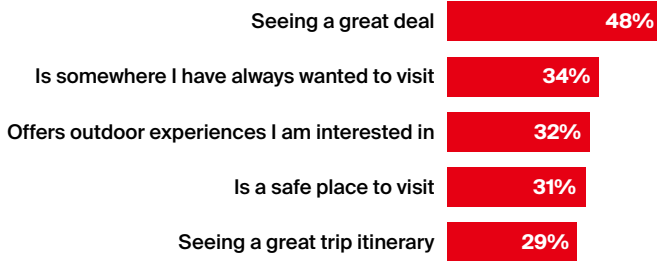


¹ Global Tourism Watch 2021.

² Statistics Canada, Frontier Counts, 2019.



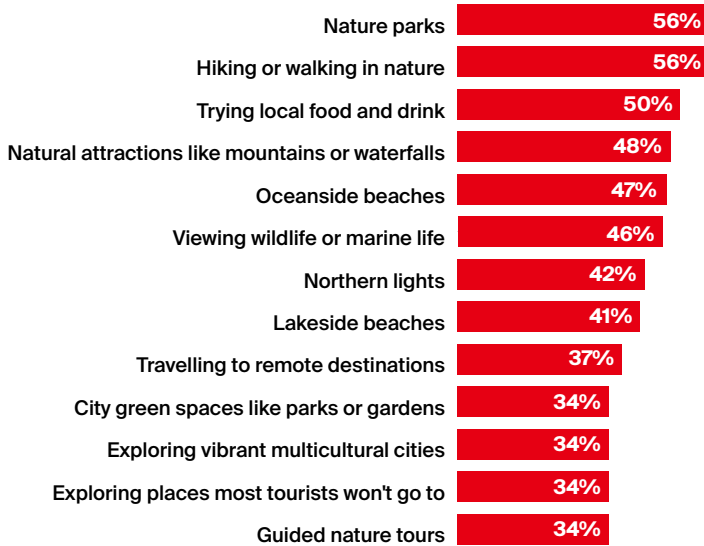
Top Motivators for Future Trip to Canada¹



Top Barriers to Canada¹



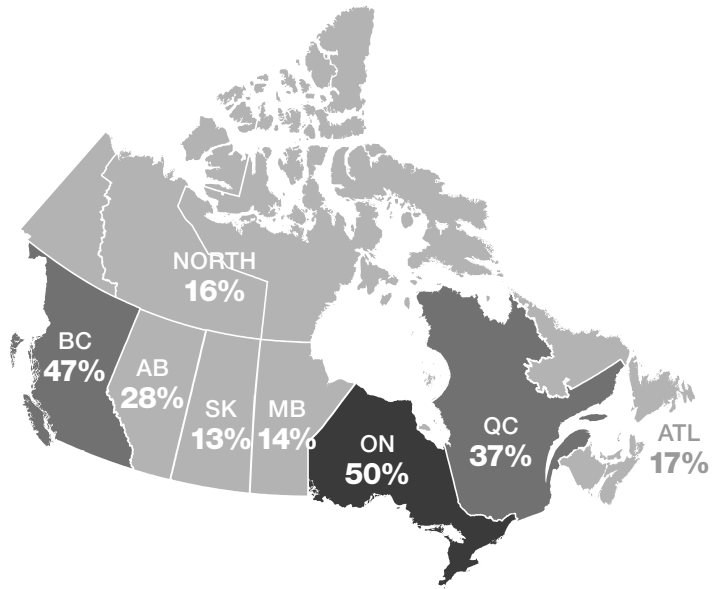
Top Activities of Interest for Future Trip to Canada¹



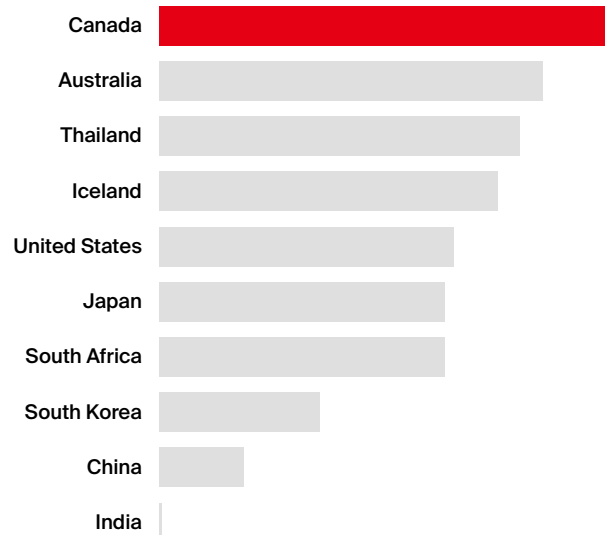
Travel Agent Usage for Future Trip to Canada¹

NET Definitely / Very / Somewhat Likely
76%

Travel Consideration by Province, % Likely to Visit by Region (Next 2 Years)¹



Net Promoter Score (Normalized)¹



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¹ Global Tourism Watch 2021.

² Statistics Canada, Frontier Counts, 2019.