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 Potential

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

Demographics

Age

18-34: 32%
35-54: 36%
55+: 33%

Monthly Household Income

Less than €2,000: 21%
€2,000 to under €3,000: 25%
€3,000 to under €4,000: 16%
€4,000 to under €5,000: 15%
€5,000 or more: 12%

Children

Yes: 30%
No: 70%

Seasonal Demand

2019 Actual Arrivals

2021 Total Demand (%)

Jan-Feb: 4%
Mar-Apr: 9%
May-Jun: 10%
Jul-Aug: 34%
Sep-Oct: 26%
Nov-Dec: 6%
**2022 MARKET HIGHLIGHTS | GERMANY**

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**Top Motivators for Future Trip to Canada**
- Seeing a great deal: 48%
- Is somewhere I have always wanted to visit: 34%
- Offers outdoor experiences I am interested in: 32%
- Is a safe place to visit: 31%
- Seeing a great trip itinerary: 29%

**Top Barriers to Canada**
- Cost: 34%
- Too far/flight too long: 20%
- Health risks: 17%
- There are other places I would rather visit: 17%
- Poor value for money: 15%
- Visa requirements: 15%
- Not enough time to take a vacation: 15%

**Top Activities of Interest for Future Trip to Canada**
- Nature parks: 56%
- Hiking or walking in nature: 56%
- Trying local food and drink: 50%
- Natural attractions like mountains or waterfalls: 48%
- Oceanside beaches: 47%
- Viewing wildlife or marine life: 46%
- Northern lights: 42%
- Lakeside beaches: 41%
- Travelling to remote destinations: 37%
- City green spaces like parks or gardens: 34%
- Exploring vibrant multicultural cities: 34%
- Exploring places most tourists won’t go to: 34%
- Guided nature tours: 34%

**Travel Agent Usage for Future Trip to Canada**
- NET Definitely / Very / Somewhat Likely: 76%

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

<table>
<thead>
<tr>
<th>Province</th>
<th>% Likely to Visit</th>
</tr>
</thead>
<tbody>
<tr>
<td>BC</td>
<td>16%</td>
</tr>
<tr>
<td>AB</td>
<td>28%</td>
</tr>
<tr>
<td>SK</td>
<td>13%</td>
</tr>
<tr>
<td>MB</td>
<td>14%</td>
</tr>
<tr>
<td>ON</td>
<td>50%</td>
</tr>
<tr>
<td>QC</td>
<td>37%</td>
</tr>
<tr>
<td>ATL</td>
<td>17%</td>
</tr>
</tbody>
</table>

**Net Promoter Score (Normalized)**

<table>
<thead>
<tr>
<th>Country</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Canada</td>
<td>Very High</td>
</tr>
<tr>
<td>Australia</td>
<td>High</td>
</tr>
<tr>
<td>Thailand</td>
<td>High</td>
</tr>
<tr>
<td>Iceland</td>
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<td>United States</td>
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<td>Japan</td>
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<tr>
<td>South Korea</td>
<td>Medium</td>
</tr>
<tr>
<td>China</td>
<td>Medium</td>
</tr>
<tr>
<td>India</td>
<td>Medium</td>
</tr>
</tbody>
</table>

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1 Global Tourism Watch 2021.  