



Germany Market Highlights – Facts at a Glance

More than 5 million German long-haul pleasure travellers intend to visit Canada in the next two years.

2017 Performance



Arrivals¹

388K (↑5%)



Average Trip Spend²

\$1,711

- Arrivals growth was underpinned by increased direct air capacity (up 9% over 2016), a stronger Euro relative to the Canadian dollar and improving economic conditions.
- The majority of air capacity growth was driven by Air Canada, as seasonal services between Berlin-Tegel/Toronto and Frankfurt/Vancouver launched in June 2017.

2018 Forecast



Visitor Forecast²

399K (↑3%)



Spend Forecast²

\$734M (↑3%)



Airline Seat Capacity³

↑**2%**



Local Currency vs CAD⁴

↑**4.6%**

Market Insights



According to recent UNWTO estimates, Germany is the 2nd largest outbound tourism market globally (behind the US). With approximately 5M German tourists considering visiting Canada in the next two years, there is an opportunity to attract this sizeable target market.⁵



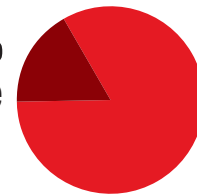
In 2017, German tourists were more likely to visit Canada during the peak season, with some spillover into shoulder season months in Autumn.¹



Compared to other markets tracked in Destination Canada's Global Tourism Watch, Germans are particularly interested in experiencing nature based activities, as well as exploring places other tourists won't go. These are characteristics Canada can authentically promote.⁵

Channel Investment Mix

19%
Travel Trade

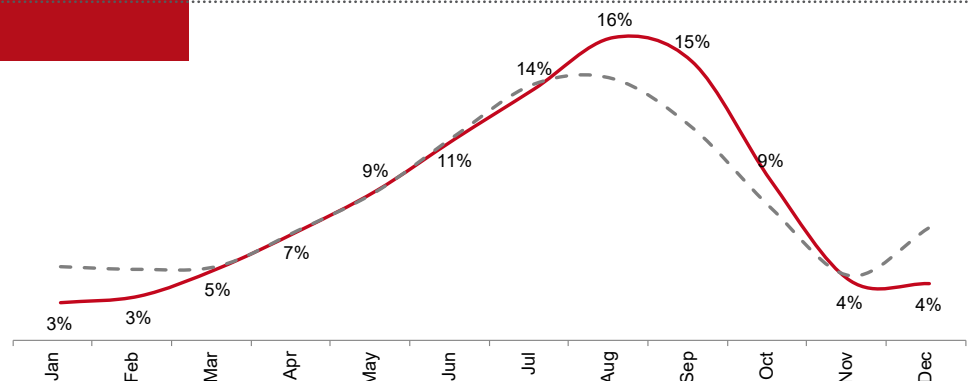


81%
Consumer Direct
& Earned Media

Travel Seasons¹

% of arrivals to Canada by month

— Germany
- - Destination Canada Market Average



Market Potential⁵



12,227,000

Canada's target market



42%

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



5,098,500

Canada's immediate potential

Top Drivers⁵

The main features that German travellers desire in a destination are...

- 1** People are friendly and welcoming
- 2** Beautiful outdoor scenery and landscapes
- 3** Allows me to de-stress
- 4** Cities are great for exploring and soaking in the atmosphere
- 5** Touring around to multiple destinations
- 6** Great place to see wildlife in its natural habitat
- 7** Proud to tell people I have visited
- 8** Cities have a lot of great attractions
- 9** Spend quality time with friends and/or family
- 10** Intellectually stimulating travel experiences

Target Audiences



Learners 25-34

They want to live like a local in their travels, and discover the real places experiences that make a destination so amazing.

Key themes

Introduce authentic experiences and niche activities that will build on their existing perceptions of Canada, and broaden myopic views of Canadian experiences.



Experiencing authentic Canadiana

Experiencing authentic Canadian culture through iconic attractions that are unique to the country.



Exploring regions, not singular destinations

Tour multiple destinations through fly-drive experiences connecting urban and outdoor adventure.



Nature connected to cities

Feeling wowed by Canada's beautiful landscapes and wildlife, while being stimulated by the culture and vibrancy of cities.



Free Spirits 45-64

The places they have travelled to and their experiences there define them. They want to discover cool places, experiences and things that they can't do at home.

Canada

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¹ Statistics Canada, Frontier Counts, 2017

² Destination Canada Research estimates, using Statistics Canada preliminary Q1-Q3 ITS, Frontier Counts and e311 adjusted data (April 2018)

³ IATA SRS Analyzer Data, March 2018

⁴ Tourism Economics, March 2018

⁵ Global Tourism Watch 2017