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

- **Arrivals**
  - 388K (+5%)
- **Average Trip Spend**
  - $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 Forecast**
  - 399K (+3%)
- **Spend Forecast**
  - $734M (+3%)

### 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.

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

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.

### Travel Seasons

% of arrivals to Canada by month

- **Germany**
- **Destination Canada Market Average**
Market Potential

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 Drivers

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.

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.

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
- Exploring regions, not singular destinations
- Nature connected to cities

For further information, please contact:
Ms. Barbara Ackermann
Interim Account Director
TravelMarketing Romberg TMR GmbH
Mettmann near Düsseldorf Germany
b.ackermann@travelmarketing.de

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