CONFIDENTIAL

GERMANY STRATEGIC REPORT

2023 GLOBAL TRAVELLER RESEARCH PROGRAM

DESTINATION CANADA

CANADIAN TOURISM DATA collective

Focus of This Report

- *Study Overview*
- *Key Insights*
- *Overall Travel Outlook & Trends*
- *Canada vs. Competitive Destinations*
- *Increasing Fall & Winter Visitation*
- *Sustainability*
- *Indigenous Tourism*

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Study Overview: Germany Market

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.

HVG Audience Definition: Frequent travellers who are likely to travel long-haul in the next two years and either earn 3,000€+ household income per month or are retired.

Timing of Fieldwork

December 12th – 18th 2023

Geographical Definition
for Qualified Trips

Outside of: Europe, North Africa and the Mediterranean

Sample Distribution

Sample distribution:	**National**
High Value Guest (HVG) Audience:	**456**
Other travellers:	**1062**
Total sample size:	**1518**

TOTAL GERMANY PERSPECTIVE
Where applicable, insights are drawn from two of YouGov's proprietary syndicated data products, YouGov Global Travel Profiles and YouGov DestinationIndex to provide overall trends among the population of Total Germans 18+

- In 2023, DC switched research providers to YouGov Canada, with the project being migrated over to YouGov's proprietary panel.
    - As a result, no trending is available for the Germany market.

Key Insights

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Travel Outlook & Trends

- **Frequency of international travel** exceeds domestic, with approximately **eight in ten** German travellers visiting international destinations at least once in two years. Amongst the HVG audience, propensity for international travel is even higher
- At **14 million each**, the highest number of **Germans typically travel** in the **Summer** and **Fall** months, but the **Spring** is a close third at **12M**
- When it comes to **planning their vacations**, Germans **increasingly rely on friends/family** but use **online random searches** just as frequently. Of note is an **uptick in** the role **social media** plays in planning. This is also the top media Germans cite as an ideal place to advertise to catch their attention
- Approximately **40%** of Germans **have utilized travel agents or tour operators**; the **primary use** for them is to **book flights** and **accommodations**
- In terms of **extreme weather events,** about **half are concerned** but the vast majority did not need to change past plans due to this. On the other hand, at about **60%, international conflicts** are of **greater concern.** And, **one in five** have had to **change plans in the past 3 years**

Canada vs. Competitive Set

- Overall, and amongst the HVG audience, **Canada ranks 3rd** in terms of **unaided consideration for long-haul destinations in the next two years**, behind **USA** and **Thailand**. This is in line with **past visitation (ever)** where the **US leads** by a substantial margin and is **followed by Canada, Thailand** and **UAE**
- Half of Germans who have ever visited Canada have done so **3 or more times.**
- **Canada leads the category** in terms of **NPS** score. **At +35, Canada is substantially higher than the US (+17)** despite its lower visitor base
- **The next 2-year immediate potential for Canada is 6.3M,** including 2.7M HVGs
- Currently, **Canada** <u>owns</u> ***place to avoid surprises during holidays*****,** and **stands out as** being a place that is ***safe for visiting, environmentally friendly, socially responsible, place where nature can be enjoyed in close proximity to cities, a great place to see wildlife in its natural habitat*** and ***a good place to live***

Key Insights

DESTINATION CANADA

Key Drivers & Opportunities

- **The top drivers of consideration** are: ***being a place to visit with family/ friends*** and ***being a good place to live*** among total German travellers and HVG audience
- **Secondary drivers** among total travellers include: *having an experiential culture* and *being a great holiday destination to avoid surprises*; while *pride to tell people you've visited, trending as must-visit spot*, and *having an experiential culture* could also drive consideration among HVGs
- **Several dimensions represent white space** in which no single destination dominates. Compared to top drivers of destination consideration, the following could be **key opportunity areas for Canada to focus on**: *being a place to visit with my friends or family*
- There is also opportunity to drive consideration to visit by **boosting perceptions of highly influential drivers like:** *being a good place to live, a place you would be proud to tell people you visited,* and *having an experiential culture* (currently a weakness for Canada)

Fall/Winter Travel

- **Canada** is a **top destination** that comes to mind for **Fall travel**, a close **second to the US**. In terms of **Winter travel** destinations, Canada **ranks a distant third**, behind **Austria and Switzerland**
- There is an **opportunity for Canada to attract more visitors** from Germany in the **Fall** and **Winter** seasons
- In terms of **immediate potential** for **Canada**, there are **7.6 million** Germans **seriously considering a visit** in the **Fall** which is **more than double** the **potential of Winter (3.4 million)**. It's likely that Canada will be competing with popular destinations within Europe such as **Austria** and **Switzerland** for Winter holidays
- **Fall activities** that Germans are **most interested** in are: **natural attractions**, **northern lights** and **hiking in nature**. In the **Winter**, the **northern lights**, **city sightseeing**, and **culinary experiences** are the activities they are interested in. Given their **stronger interest in snow sports**, there may be an **opportunity to communicate Canada's offering more directly to HVGs**

Key Insights

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Sustainable Travel

- While **sustainability** is only a **moderate priority** among most German travellers and the HVG audience on a stated level, ***environmental-friendliness*** and ***social responsibility*** still fall in the top half of consideration drivers for German travellers
- **Canada** currently leads on **perceptions of *being socially responsible***, but **falls behind Iceland** on ***environmentally-friendly***
- The **primary barrier** to sustainable travel is the **perceived expense**. **HVGs** are more likely to say travelling sustainably would **limit the types of activities** and **doesn't meet their needs for comfort or luxury**
- Sustainability efforts that are **most important** for travellers include: the **local culture not being impacted by tourism** and **having eco-friendly transportation options. HVGs** place **equal level of importance** on having **eco-friendly accommodations** and knowing their money is **directly supporting the local community** as having eco-friendly transport options

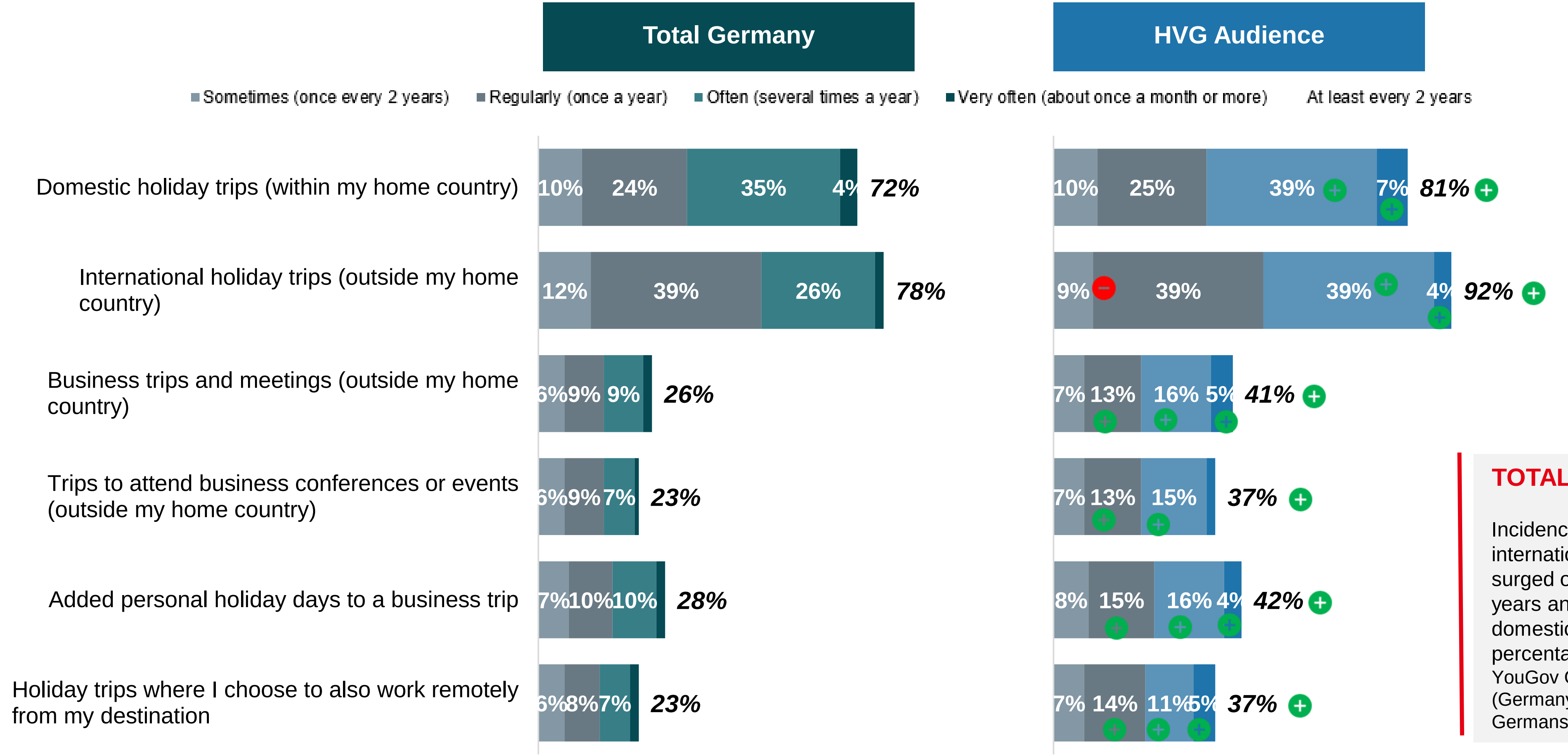
Indigenous Tourism

- At 16%, **Australia** was the **top destination mentioned on an unaided basis** when it comes to **Indigenous tourism**, followed by the **US** (12%). Mentions of **Canada** were at **just 7%** (behind **Brazil** and **Mexico**) suggesting it **does not yet stand out for its Indigenous culture**. Similarly, there are **no specific themes** that stand out when it comes to activities in experiencing the culture
- While activities around Canada's Indigenous culture on their own are not likely to be a strong influence on choice overall, about **three-quarters express an interest** in **related activities** during a visit in both the **Fall and Winter** season, suggesting there could be opportunity to tie seasonal activities with Indigenous activities
- **Improving knowledge** of Canada's **Indigenous culture** and **highlighting** the **specific activities** that can be experienced, **may help strengthen perceptions**
- Travellers are interested in a variety of activities with the **most interest** in **experiencing food and drink, excursions in nature** and **visiting Indigenous communities**. Conversely, interest is **relatively low** for **hunting and fishing**

Overall Travel Outlook & Trends

Types of Travel Trips

International travel frequency exceeds domestic amongst German travellers, with almost eight in ten travelling internationally at least once every two years. Amongst the HVG audience, international travel is even more prominent.



TOTAL GERMANY

Incidence of planned international vacations has surged over the last three years and now leads planned domestic vacations by over ten percentage points

YouGov Global Travel Profiles (Germany) – 2023 Base: Total Germans 18+

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1518); HVG (n=456)
A6. How often do you typically travel on each of the following types of trips?

+ / − = significantly higher/lower result (vs. Total)

Overall Demand for Long-Haul Pleasure Travel

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Total Population 18+
69,700,000

x

Long-Haul Traveller Incidence Rate
32.6%

=

Size of Target Market
22,722,000

x

HVG
30.7%

=

Size of HVG Population
6,975,500

Total Germany | **HVG Audience**

Potential Market Size

Total Germany

Total potential long-haul pleasure travellers aged 18 years or more
22,722,000

Target Market for Canada
14,860,000

X 65.4%
Dream to purchase Stage for Canada

Immediate Potential for Canada
6,256,000

X 42.1%
Likely to visit Canada in the next 2 years[1]

Base: Target market for Canada = long-haul pleasure travellers (past 3 years or next 2 years) (n=1518); Immediate potential for Canada = dream to purchase stages for P2P for Canada (n=992)

HVG Audience

Total potential HVG travellers aged 18 years or more
6,975,500

HVG Target Market for Canada
4,757,500

X 68.2%
Dream to purchase Stage for Canada

HVG Immediate Potential for Canada
2,683,000

X 56.4%
Likely to visit Canada in the next 2 years[1]

Base: Target market for Canada = long-haul pleasure travellers (past 3 years or next 2 years), HVG Audience (n=456); Immediate potential for Canada = dream to purchase stages for P2P for Canada (n=311)

[1] Includes respondents likely to visit Canada for a trip of 1 to 3 nights, or a trip of 4 nights or more.
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)

Vacation Planning Methods*

An increasing number of Germans are relying on information from friends and family when planning vacations. Online search is used by more than one third of Germans.

Vacation Planning Methods

Select Vacation Planning Methods (Trended)

*2023 Base: German 18+ (n=19,174)
2021-2023 Quarterly Trending Base Range: German 18+ (n=4,542-4,962)
Q: Which, if any, of the following methods do you generally use to help plan a vacation? Please select all that apply.

YouGov Global Travel Profiles (Germany) – 2023

/ = significantly higher/lower result (vs. 2022) | / = significantly higher/lower result (vs. previous quarter)

Effective Types of Travel Advertising*

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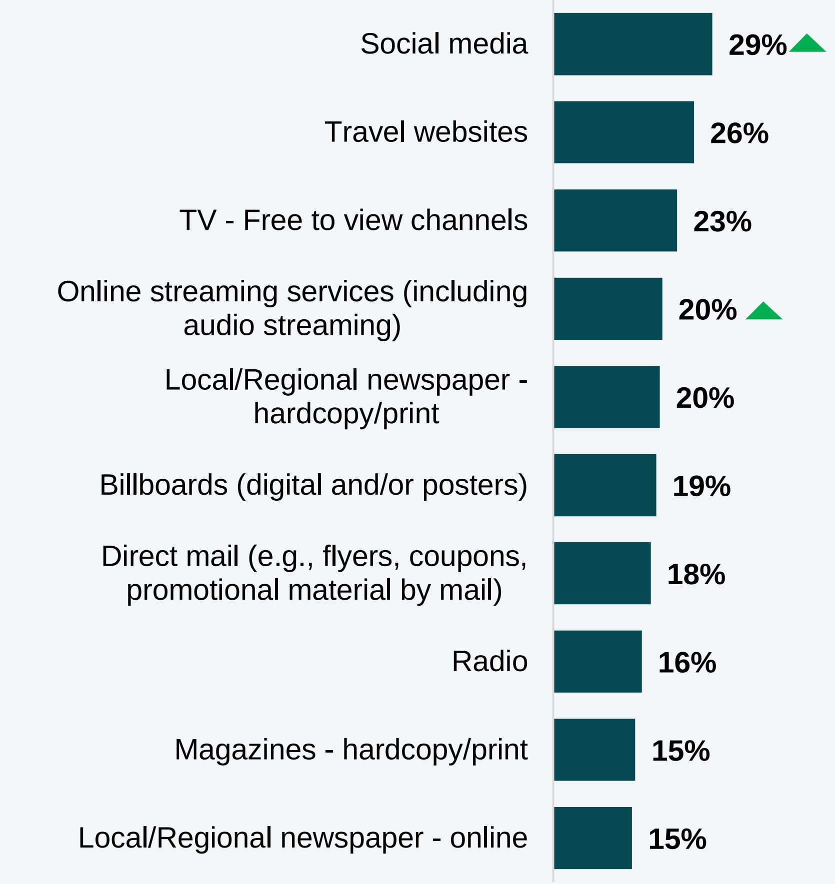
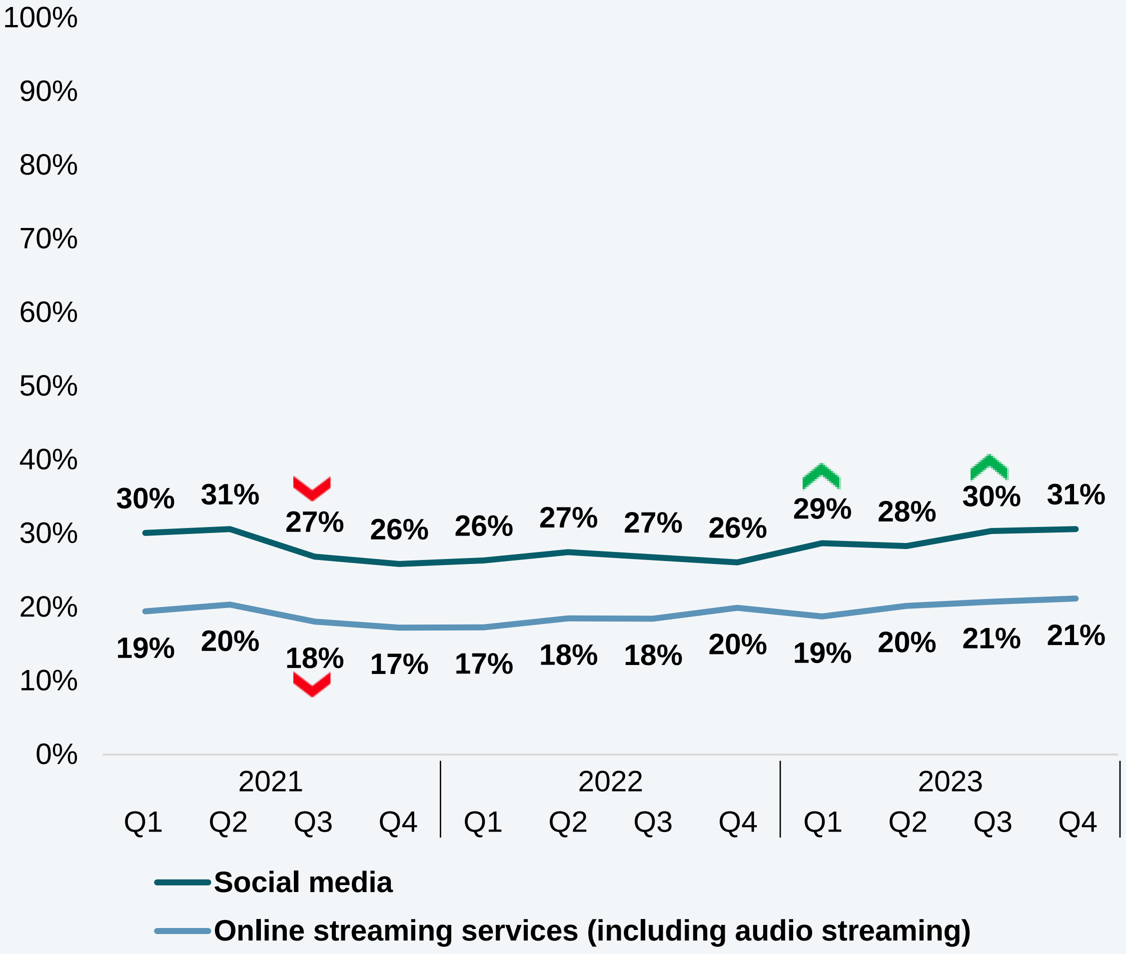
Mentions of social media and online streaming services as effective advertising channels increased in 2023. Travel websites, broadcast TV and print are also among the top mentions.

Effective Types of Travel Advertising (Top Responses)



Select Types of Travel Advertising (Trended)



*2023 Base: German 18+ (n=19,174)
2021-2023 Quarterly Trending Base Range: German 18+ (n=1,568-4,962)
Q: Thinking about your next travel- or vacation-related purchase, if you were a travel/vacation provider where would you advertise to catch your attention? Please select all that apply.

/ = significantly higher/lower result (vs. 2022) | / = significantly higher/lower result (vs. previous quarter)

Travel Agents/Tour Operator Usage For Recent Trip

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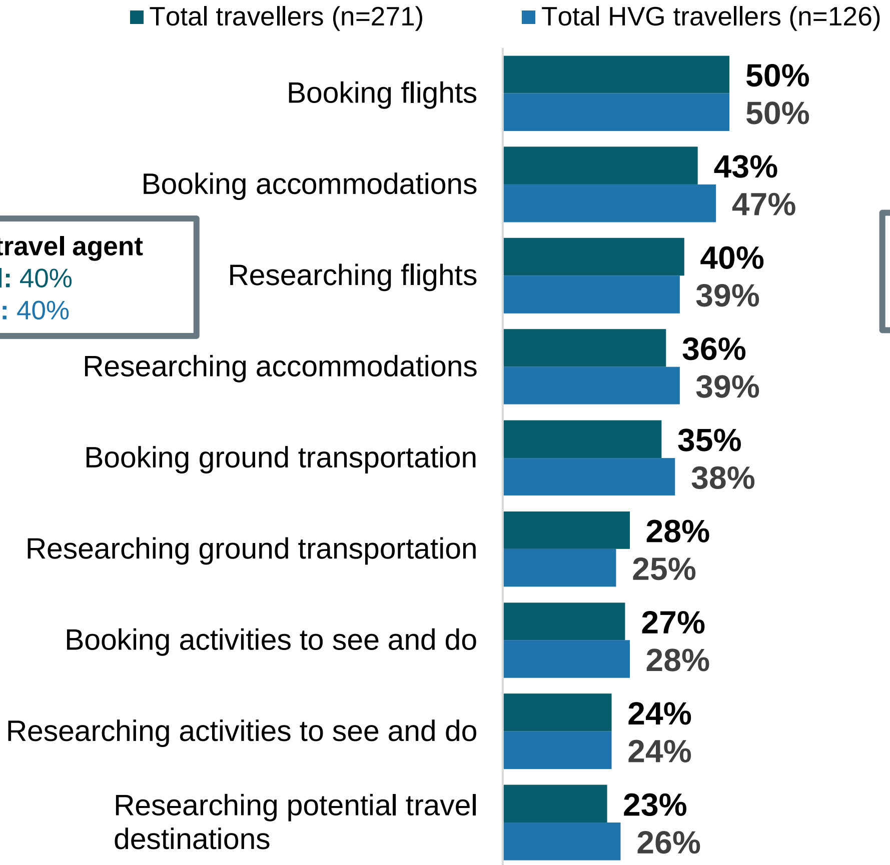
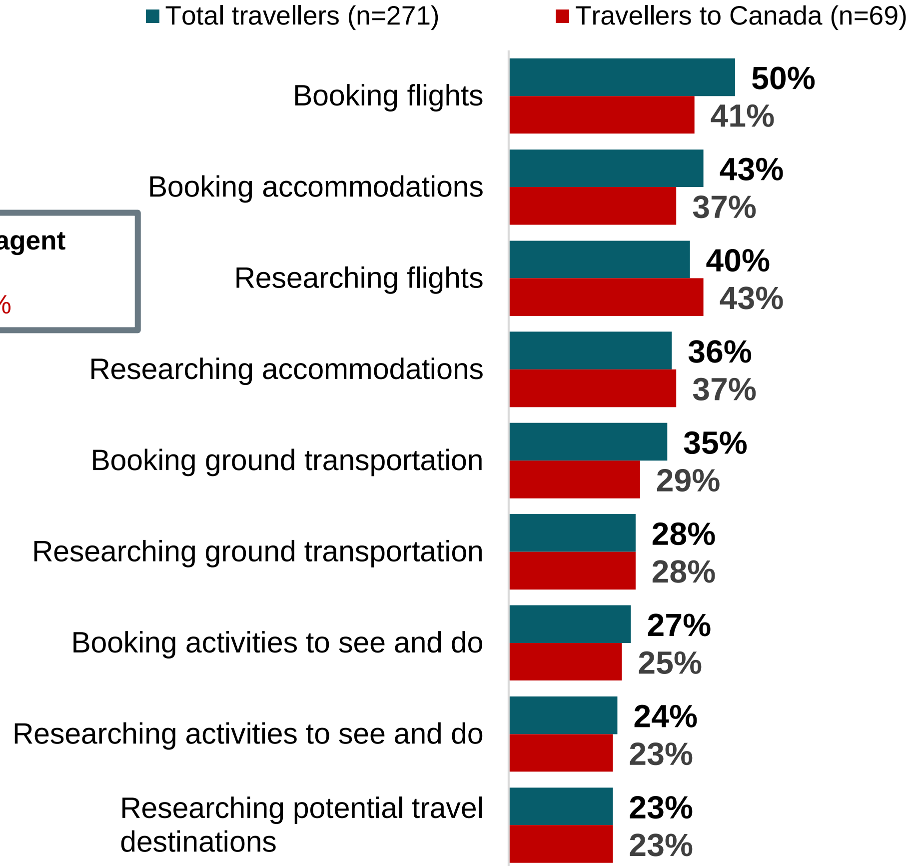
Four in ten Germans have used travel advisors; the primary use being for booking flights and accommodations.

Total Travellers to Any Destination vs. HVG Travellers to Any Destination



% Used a travel agent
Total: 40%
HVG: 40%

Total Travellers to Any Destination vs. Total Travellers to Canada



% Used a travel agent
Total: 40%
Canada: 45%

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination, Used a Travel Agent/Tour Operator (n=271); HVG (n=126); Travellers to Canada (n=69)
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 Tui Reisecenter or Dertour , they do not include 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)
F10. Which of the following did a travel agent or tour operator help you with?

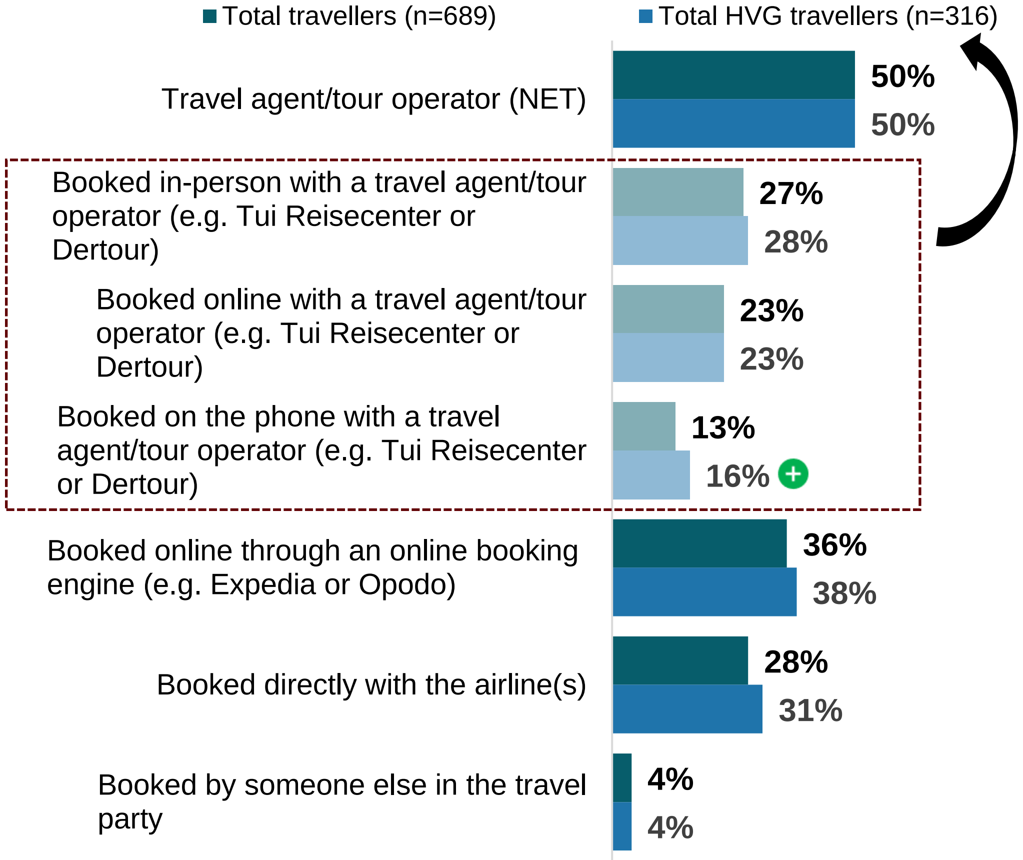
+ / − = significantly higher/lower result (vs. Total)

Booking Flights For Recent Trip

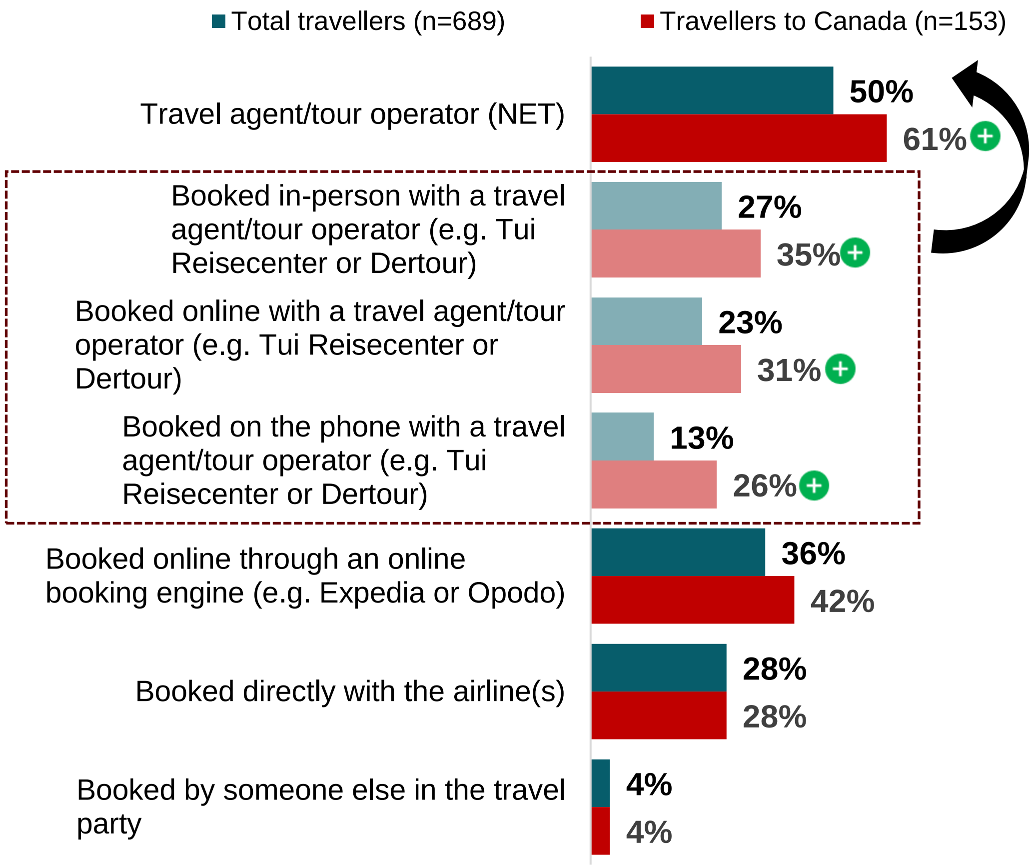
DESTINATION CANADA

Half of flights are booked through a travel agent, followed by an online booking engine. Only 3 in 10 flights are booked directly with the airline.

Total Travellers to Any Destination vs. HVG Travellers to Any Destination



Total Travellers to Any Destination vs. Total Travellers to Canada



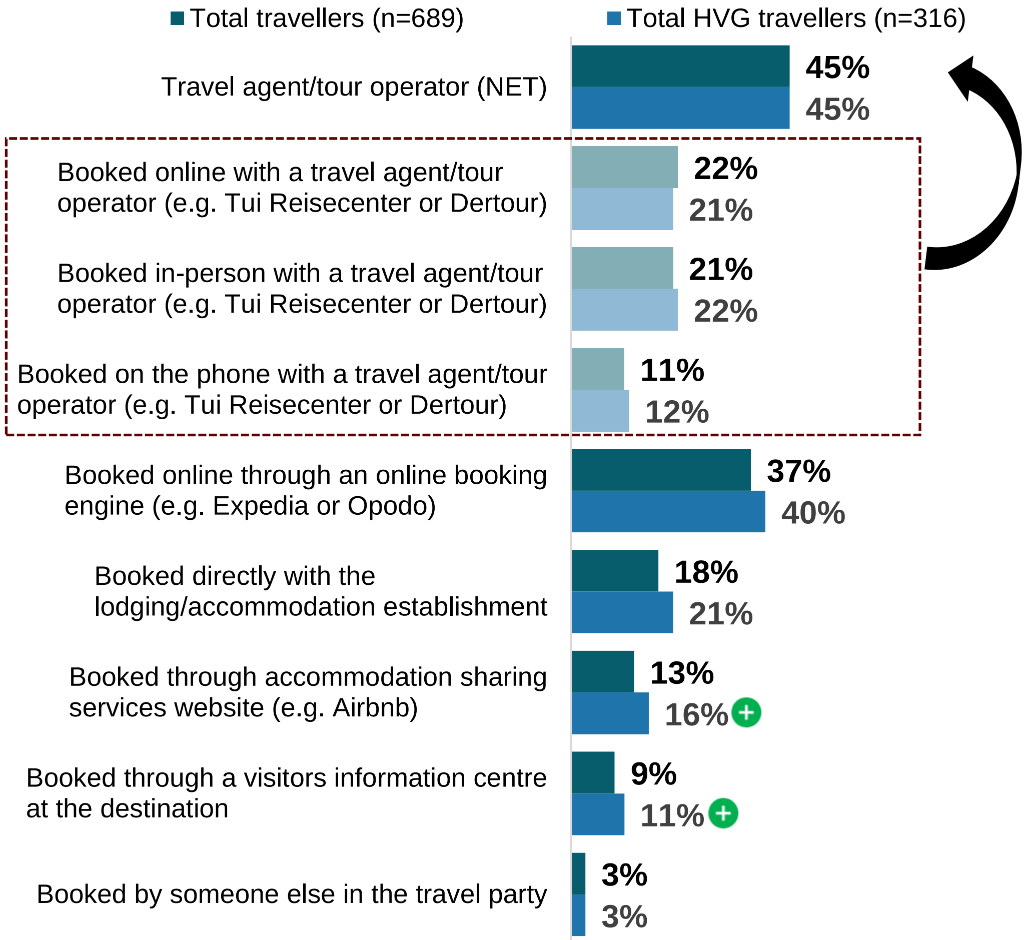
Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination (n=689); HVG (n=316); Travellers to Canada (n=153)
F12. How did you book your flight for this trip? (Select all that apply)

+ / − = significantly higher/lower result (vs. Total)

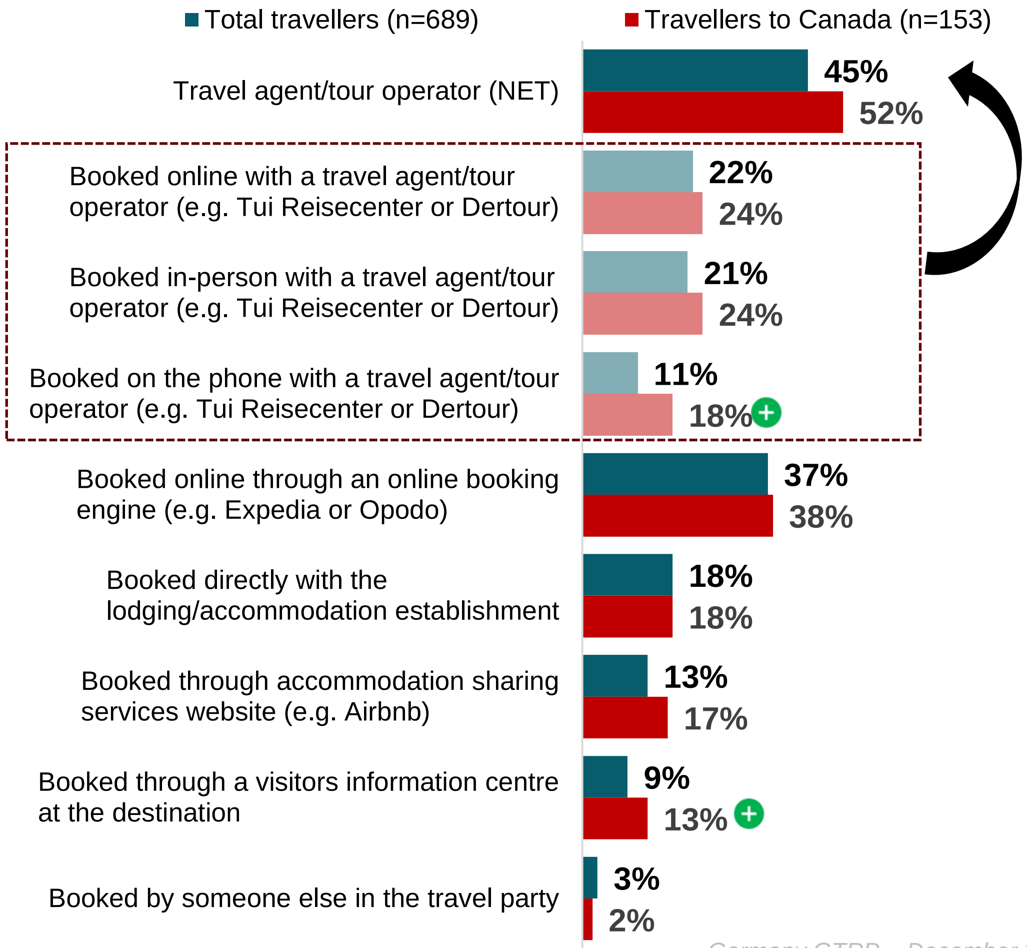
Booking Accommodations For Recent Trip

When it comes to accommodations, almost half are booked through a travel agent and almost 4 in 10 are booked through an online booking engine.

Total Travellers to Any Destination vs. HVG Travellers to Any Destination



Total Travellers to Any Destination vs. Total Travellers to Canada

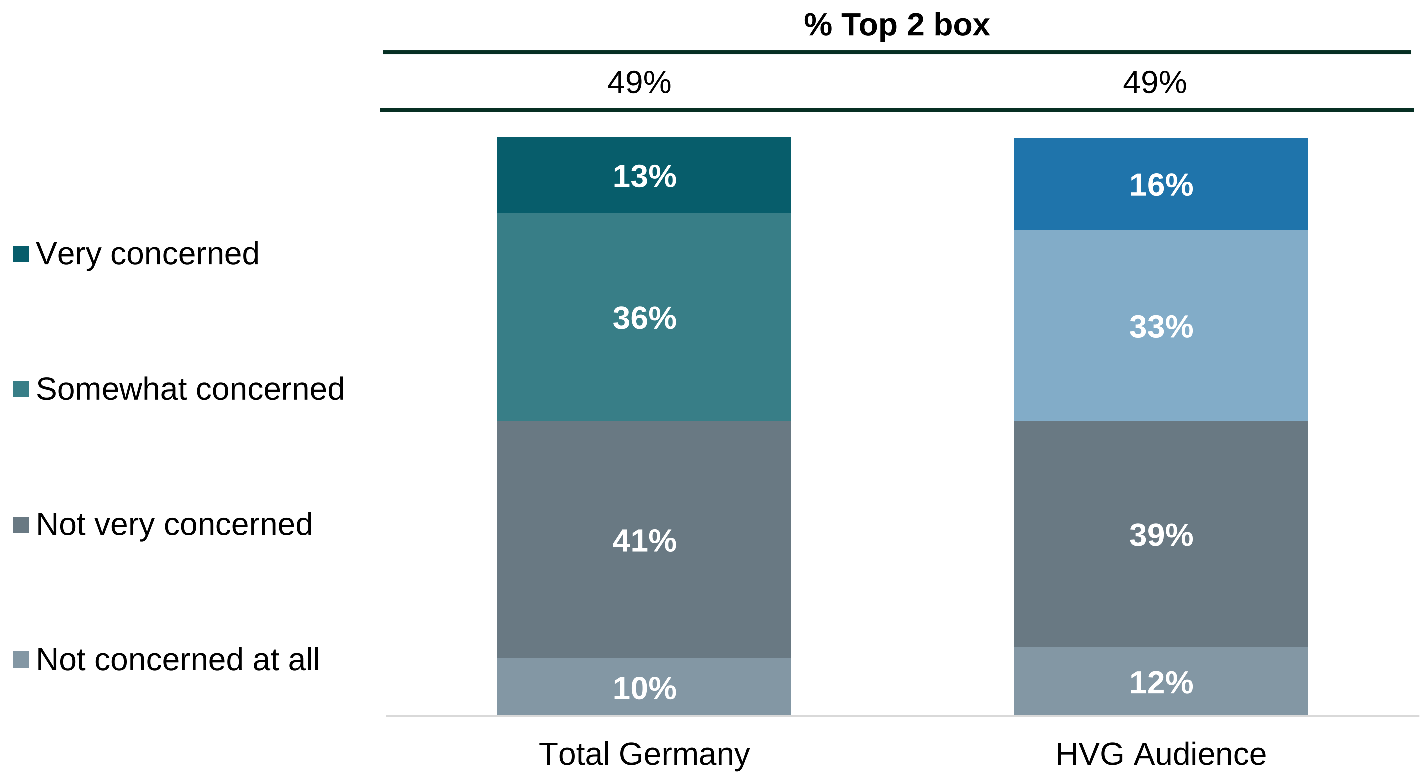


Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination (n=689); HVG (n=316); Travellers to Canada (n=153)
F13. How did you book your accommodation for this trip? (Select all that apply)

+ / − = significantly higher/lower result (vs. Total)

Impact of Extreme Weather Events on Travel Plans

About half of German travellers have concerns about extreme weather events, overall and amongst the HVG audience. This concern has not made a significant impact on their plans, with less than 20% cancelling or changing plans in the last three years due to weather.



	Total Germany	HVG Audience
% Yes Changed/Cancelled Plans in P3Y Due to Extreme Weather Events	16%	22% (+)

Extreme Weather Events Description

As you may or may not be aware, extreme weather events are occurrences of unusually severe weather or climate conditions. They are often short-lived and include blizzards, heat waves, wildfires, tornadoes, hurricanes or tropical cyclones.

Note: respondents were asked either about extreme weather events (D10/D11) or international conflicts & unrest (D12/D13)
Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=791); HVG (n=240)
D10. [DESCRIPTION] How concerned are you about extreme weather events affecting your travel plans?
D11. In the past 3 years, have you ever had to change plans or cancel a trip due to extreme weather events?

(+) / (–) = significantly higher/lower result (vs. Total)

Impact of International Conflicts & Unrest on Travel Plans

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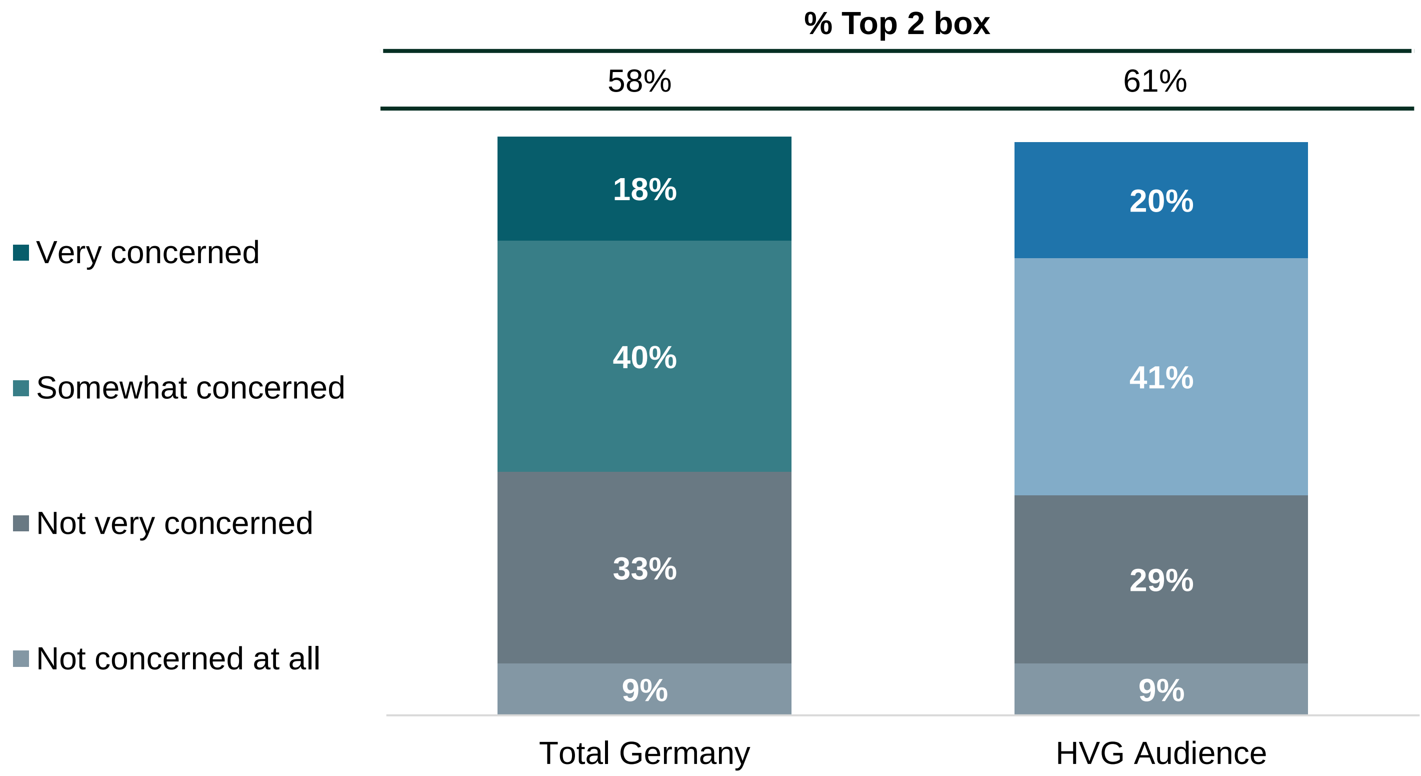
When it comes to international conflict, concerns are a bit higher, with about 6 in 10 German travellers concerned and 2 in 10 changing plans due to conflicts in the past three years.



	Total Germany	HVG Audience
% Yes Changed/Cancelled Plans in P3Y Due to International Conflicts	20%	23%

International Conflicts Description

As you may or may not be aware, international conflicts and unrest are currently occurring in different regions around the world.

Note: respondents were asked either about extreme weather events (D10/D11) or international conflicts & unrest (D12/D13)
Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=727); HVG (n=216)
D12. [DESCRIPTION] How concerned are you about international conflicts or unrest affecting your travel plans?
D13. In the past 3 years, have you ever had to change plans or cancel a trip due to international conflicts or unrest?

+ / − = significantly higher/lower result (vs. Total)

Canada vs. Competitive Destinations

Past Visitation

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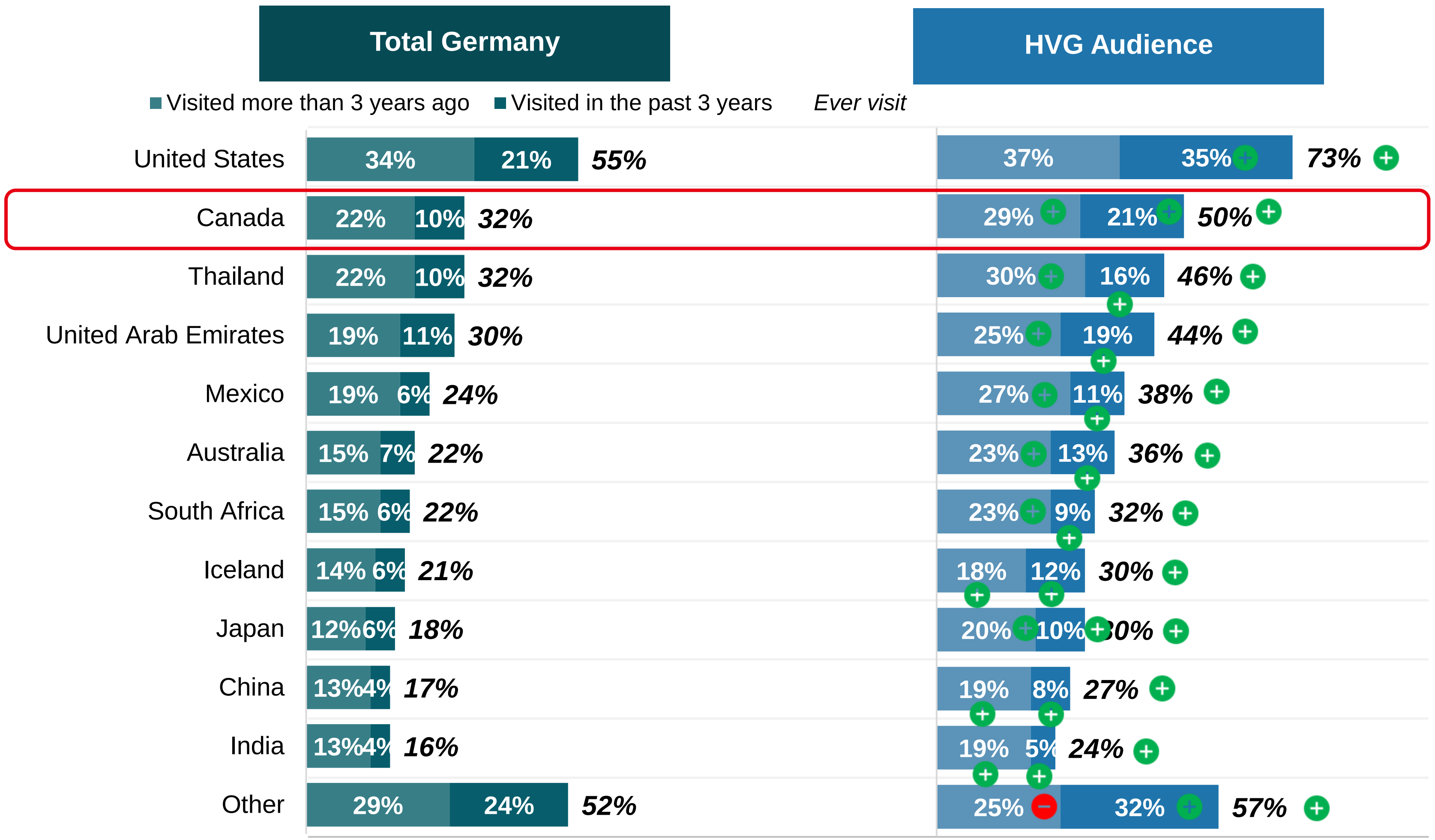
Amongst German travellers, Canada ranks second in terms of long-haul destinations ever visited, behind the United States and in line with Thailand and UAE.



Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1518); HVG (n=456)
B5. Which of the following countries or regions have you visited while on a holiday trip **outside of Europe, North Africa and the Mediterranean** which was 4 or more nights long?

+ / − = significantly higher/lower result (vs. Total)

Number of Visits Ever & Time of Year Visited Canada

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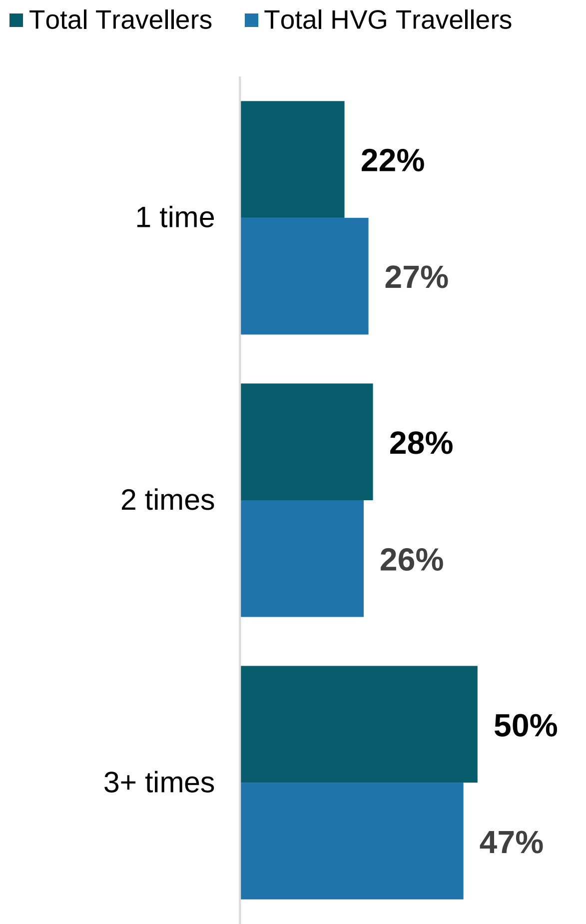
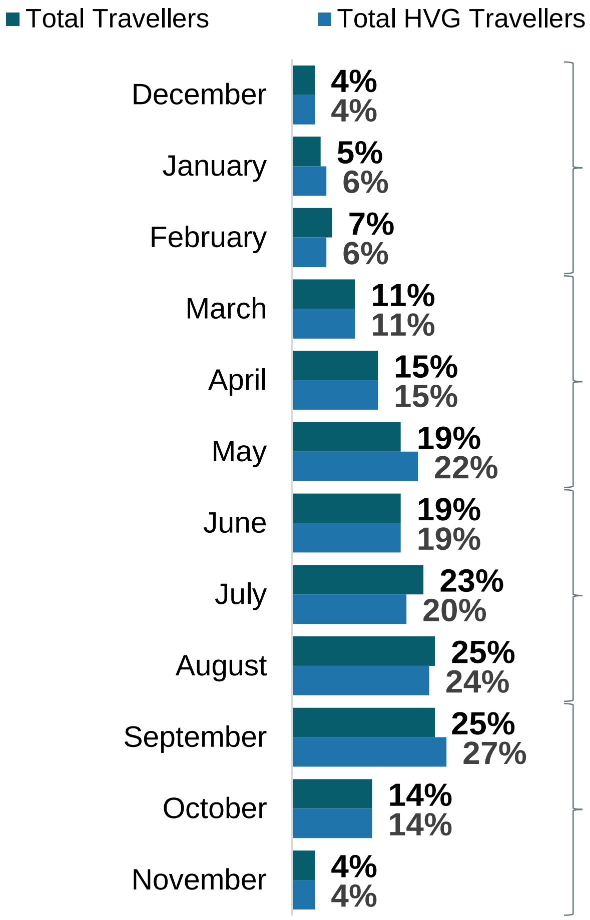
Approximately half of German travellers who have been to Canada, have visited three or more times. The majority of the visits were in the Summer, followed by the Spring. Just 13% ever visited in the Winter.





	Total Travellers	Total HVG Travellers
Winter	13%	13%
Spring	37%	39%
Summer	48%	45%
Fall	33%	35%

Base: Long-haul pleasure travellers (past 3 years or next 2 years)
F19. Approximately, how many times have you been to Canada? Ever Visited Canada (excluding None) (n=236); HVG (n=120)
F20. What time of year have you ever visited Canada? Select all that apply. Visited Canada (n=475); HVG (n=225)

+ / – = significantly higher/lower result (vs. Total)

Net Promoter Score (NPS)

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When it comes to the NPS scores among those who have ever visited each destination, Canada ranks first, about double that of the United States despite its higher visitation.

Total Germany

Destination	Detractors (0-6)	Passives (7-8)	Promoters (9-10)	NPS
Canada (n=475)	16%	33%	51%	+35%
United States (n=823)	25%	33%	42%	+17%
Australia (n=329)	25%	36%	39%	+14%
Thailand (n=478)	29%	31%	40%	+11%
Iceland (n=307)	29%	34%	37%	+7%
Japan (n=277)	31%	32%	37%	+6%
South Africa (n=323)	35%	34%	31%	-4%
United Arab Emirates (n=455)	39%	32%	29%	-10%
Mexico (n=365)	38%	36%	26%	-11%
India (n=243)	44%	33%	23%	-21%
China (n=258)	50%	31%	18%	-32%

HVG Audience

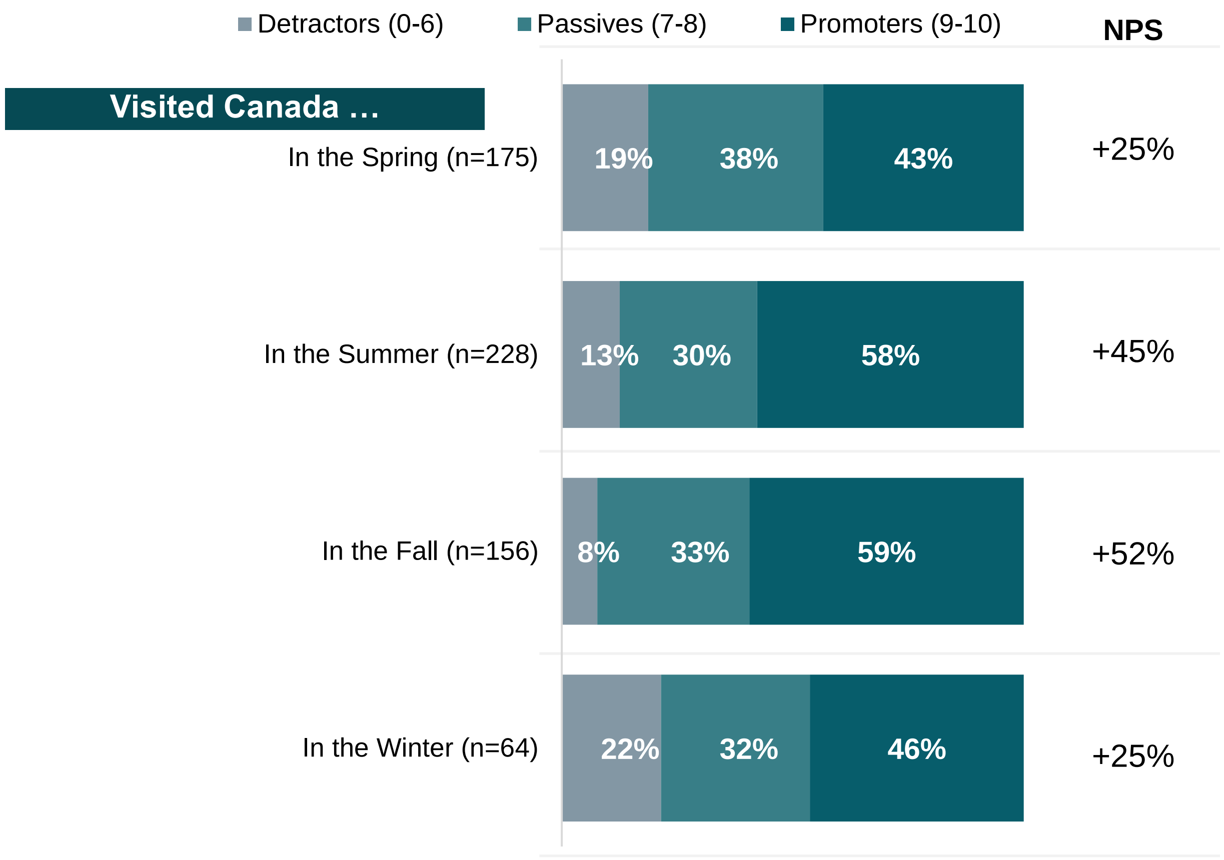
Destination	Detractors (0-6)	Passives (7-8)	Promoters (9-10)	NPS
Canada (n=225)	15%	33%	53%	+38%
United States (n=331)	21% −	34%	44%	+23%
Australia (n=166)	23%	40%	37%	+14%
Thailand (n=208)	26%	35%	39%	+13%
Iceland (n=138)	29%	37%	34%	+5%
Japan (n=134)	30%	35%	35%	+5%
South Africa (n=147)	31%	40% +	29%	-3%
United Arab Emirates (n=198)	38%	33%	29%	-10%
Mexico (n=172)	36%	38%	26%	-11%
India (n=109)	42%	38%	21%	-21%
China (n=123)	43% −	36%	20%	-23% +

Note: all respondents evaluated countries they have ever visited from the competitive set.
Base: Long-haul pleasure travellers (past 3 years or next 2 years), Visited [DESTINATION]
C8. How likely are you to recommend each of the following holiday destinations to a friend, family member or colleague?

+ / − = significantly higher/lower result (vs. Total)

Canada Net Promoter Score (NPS) by Season

Canada has a high NPS score regardless of season visited, but is highest in the Fall, followed by Summer.



Note: all respondents evaluated countries they have ever visited from the competitive set.
Base: Long-haul pleasure travellers (past 3 years or next 2 years), Visited **Canada**
C8. How likely are you to recommend each of the following holiday destinations to a friend, family member or colleague?
F20. What time of year have you ever visited Canada? Select all that apply.

Performance Scorecard for Canada

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Canada performed well in the German market in 2023, ranking 1st (out of 10 destinations) in three of eight key performance metrics and in the top three in six of eight metrics. Consideration and ad awareness of Canada both increased year-over-year.

Total Impression	37%	Ranks 2nd *(out of 10)*	(Behind: US)
Consideration	13% ▲	Ranks 3rd *(out of 10)*	(Behind: US, IS)
Positive Recommend	23%	Ranks 2nd *(out of 10)*	(Behind: US)
Destination Health Index	24%	Ranks 1st *(out of 10)*	
Positive Reputation	36%	Ranks 1st *(out of 10)*	
Positive Buzz	11%	Ranks 1st *(out of 10)*	
Ad Awareness	5% ▲	Ranks 5th *(out of 10)*	(Behind: AE, US, TH, IS)
Word of Mouth	7%	Ranks 4th *(out of 10)*	(Behind: US, TH, IS)

TOTAL Germany

Competitive set: US, Iceland, Thailand, Japan, Australia, Mexico, UAE, India, China

YouGov DestinationIndex (Germany) – 2023

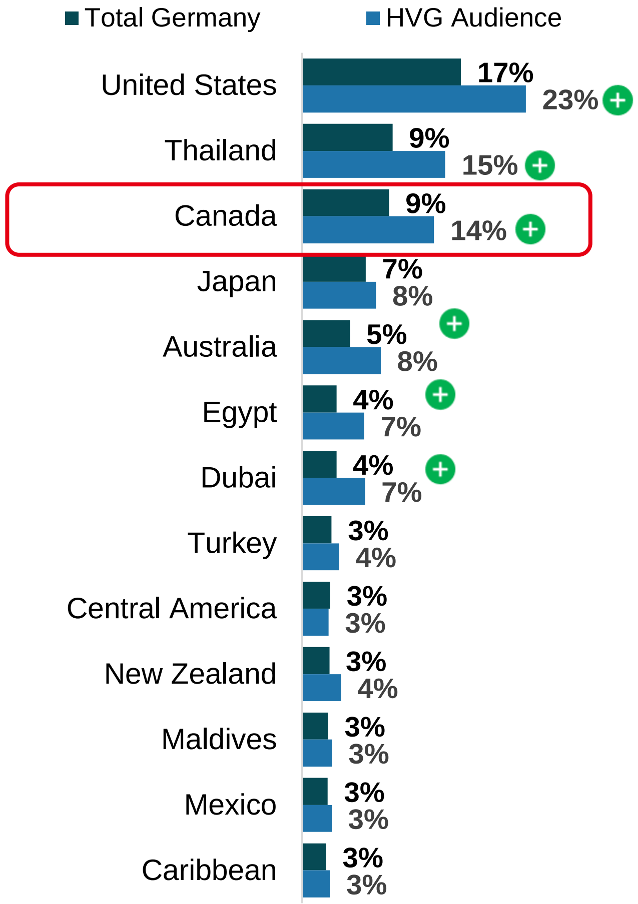
Base: German 18+ (n=8,315)

▲ / ▼ = significantly higher/lower result (vs. 2022)

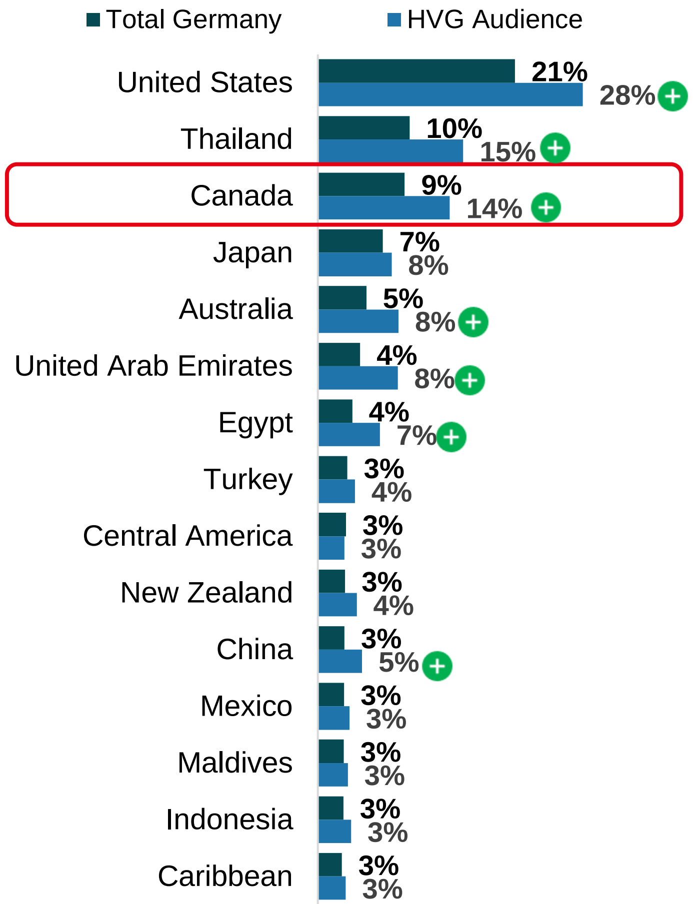
Unaided Long-Haul Destination Consideration (Next 2 Years)

Canada ranks 3rd overall, and amongst the HVG audience, when it comes to unaided consideration in next two years.

Top Destination Brands[1]



Top Destinations[2]



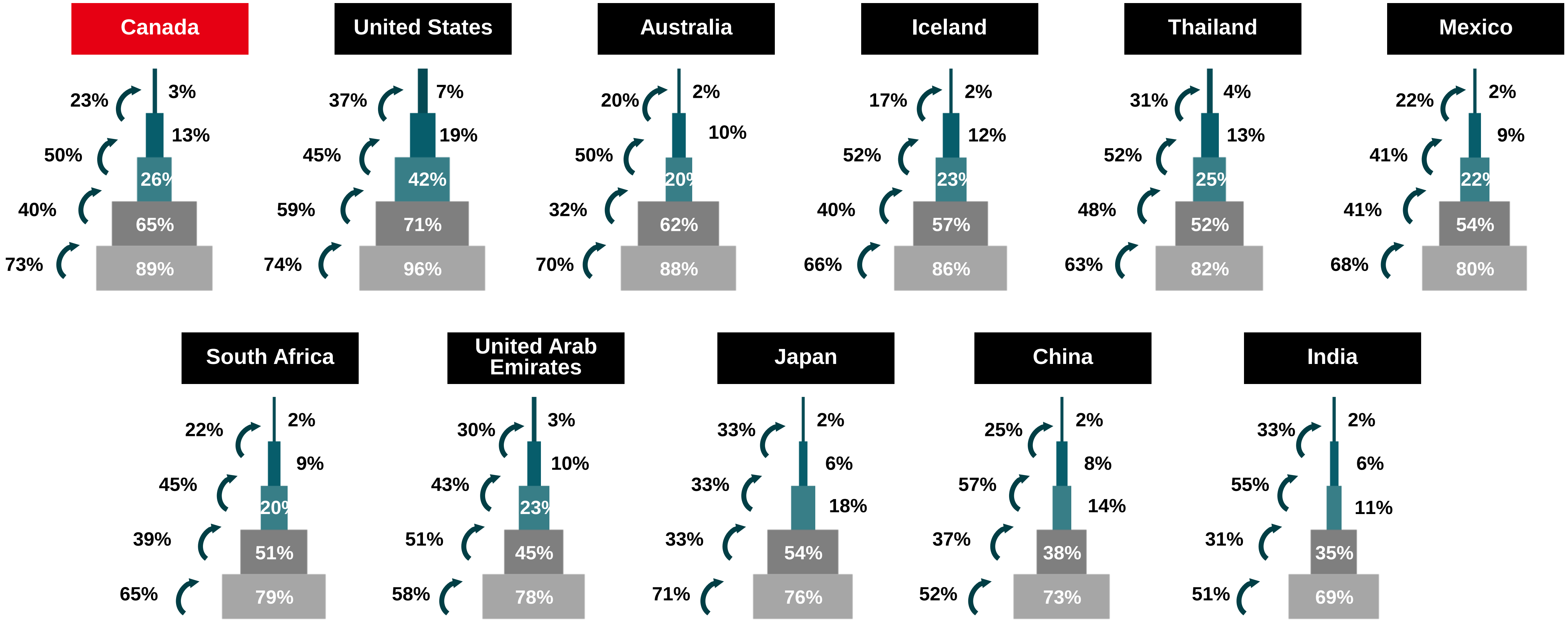
[1] Responses as mentioned by respondents (e.g., percentage who said “Canada” specifically).
[2] Roll-up of brand mentions by country (e.g., percentage who said “Canada” or any destination in Canada).
Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1518); HVG (n=456)
B1. You mentioned that you are likely to take a 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 (vs. Total)

Consideration Funnels: Total Germany Travellers

A quarter of travellers in Germany are seriously considering visiting Canada in the next two years with 13% actively planning. When compared with the United States (59%), Canada (40%) has softer conversion from dream stage to consider.

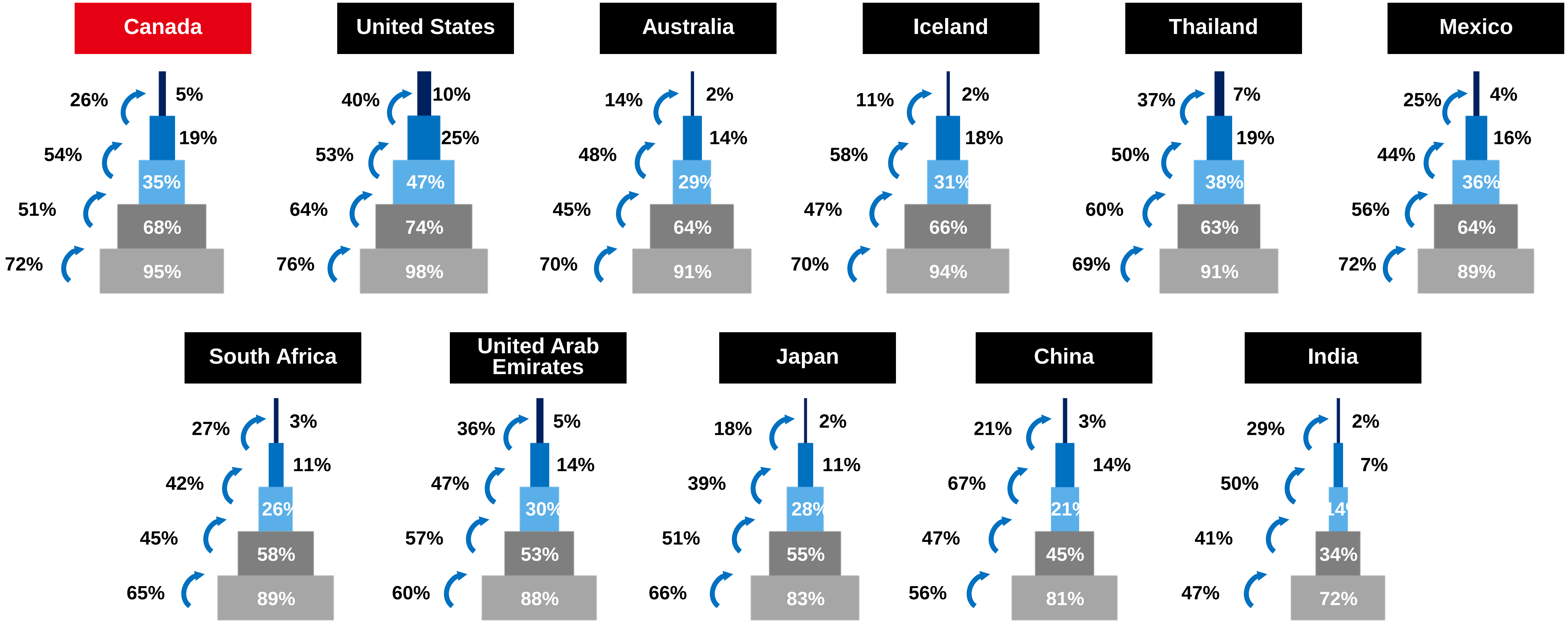
DESTINATION CANADA



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 [DESTINATION]
See notes for question wording and funnel definitions

Consideration Funnels: Among HVG Audience

Among HVGs, over one third are seriously considering visiting Canada in the next two years with 19% actively planning. Canada trails behind the United States and Thailand on serious consideration due to weaker conversion from general interest.



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 [DESTINATION]
See notes for question wording and funnel definitions

Destination Consideration By Seasons

By season, UAE has the highest consideration in the Winter, followed closely by Thailand and Australia. The US tops the list in the Spring followed by UAE and Japan. Iceland and Canada lead in the Summer and Canada leads in the Fall.

Total Germany	Winter (Dec, Jan, Feb)	Spring (Mar, Apr, May)	Summer (Jun, Jul, Aug)	Fall (Sept, Oct, Nov)
Australia (n=280)	43%	43%	29%	42%
Canada (n=992)	23%	38%	56%	51%
China (n=173)	21%	47%	39%	38%
Iceland (n=261)	25%	38%	58%	40%
India (n=157)	34%	44%	34%	35%
Japan (n=246)	21%	49%	37%	35%
Mexico (n=247)	35%	46%	32%	39%
South Africa (n=232)	42%	41%	25%	45%
Thailand (n=238)	45%	42%	30%	43%
United Arab Emirates (n=207)	48%	49%	23%	48%
United States (n=321)	31%	50%	53%	48%

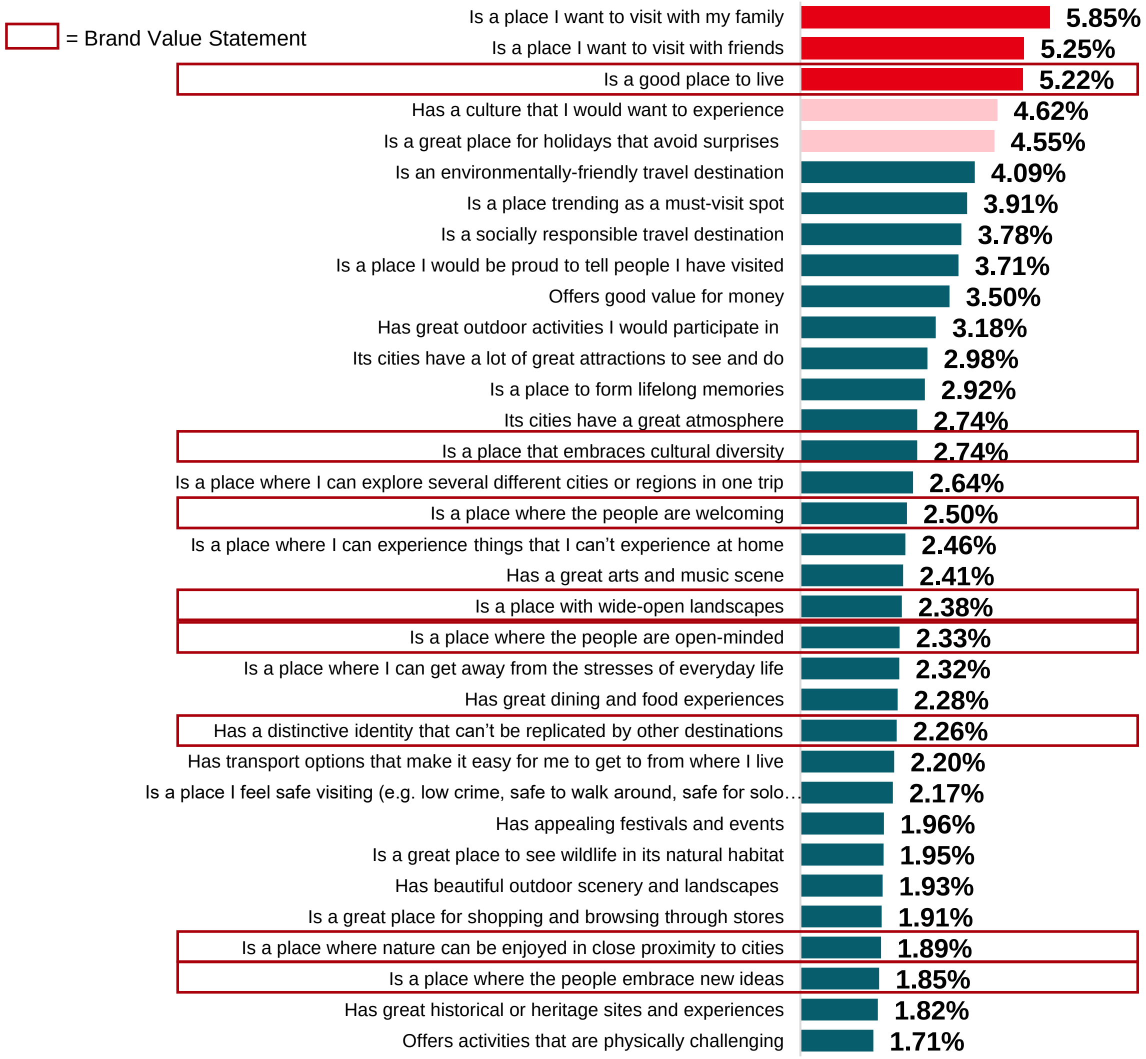
HVG Audience	Winter (Dec, Jan, Feb)	Spring (Mar, Apr, May)	Summer (Jun, Jul, Aug)	Fall (Sept, Oct, Nov)
Australia (n=105)	44%	43%	33%	40%
Canada (n=311)	29% +	43% +	59%	57% +
China (n=60)	25%	49%	50% +	55% +
Iceland (n=85)	30%	43%	56%	40%
India (n=46*)	41%	33%	43%	28%
Japan (n=71)	24%	55%	43%	33%
Mexico (n=92)	32%	49%	44% +	38%
South Africa (n=83)	37%	42%	26%	48%
Thailand (n=81)	54% +	50%	33%	48%
United Arab Emirates (n=75)	55%	52%	34% +	60% +
United States (n=92)	42% +	60% +	60%	51%

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), Those in the dream to purchase stages of the path to purchase for [DESTINATON]
C7. For each of the following destinations, during which months would you consider taking a holiday trip in the next 2 years?
*Small base size, interpret with caution (n<50)

+ / – = significantly higher/lower result (vs. Total)

Destination Attributes: Drivers Analysis

The most influential attributes to consideration are being a place to visit with family/ friends, being a good place to live, having an experiential culture, and being a great holiday destination to avoid surprises.



Description

Key drivers analysis (KDA) seeks to identify the strongest predictors of a dependent variable. In this case, we used consideration of a destination (C2) as the dependent variable. The analysis uses a mix of linear and logistic regressions, assessing the simultaneous effect of many independent variables, destination attributes (C6) while controlling for each other.

Interpretation

Attributes with a high percentage level are more likely to impact consideration of a destination. This generally means that destinations that score highly on the top attributes may have higher consideration levels. Each percentage does also indicate the degree of relative impact. An attribute with a score of 5% is twice as impactful on consideration as an attribute with a score of 2.5%.

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)
C6. We are interested in your general impressions about destinations even if you have never been there. Please select all the destinations you think apply to the statement. Select "None of these" if you think none of the destinations apply.

Destination Attributes – Relative Strengths & Weaknesses: Among Total Germany

When it comes to strengths and weaknesses, Canada owns place that avoids surprises, being a place I feel safe visiting, is environmentally friendly, socially responsible, and a great place to see wildlife in its natural habitat. There is white space on the top drivers of being a place I want to visit with friends and family. Of note, Canada currently has a weakness in having an experiential culture, which is a top 5 driver.

DESTINATION CANADA

		Canada	Australia	China	Iceland	India	Japan	Mexico	South Africa	Thailand	United Arab Emirates	United States
	n=	1518	456	455	455	456	455	455	455	456	456	455
Higher Order Motivations	Is a place where I can get away from the stresses of everyday life				Strength							Weakness
	Is a place to form lifelong memories											
	Is a place I would be proud to tell people I have visited											
General Needs	Is a place I feel safe visiting (e.g. low crime, safe to walk around, safe for solo travel etc.)	Strength			Strength	Weakness	Strength	Weakness	Weakness	Weakness	Strength	Weakness
	Is a place where I can explore several different cities or regions in one trip				Weakness							
	Offers good value for money	Weakness	Weakness			Strength	Weakness	Strength		Strength		Weakness
	Has transport options that make it easy for me to get to from where I live		Weakness								Strength	
Type of Trip	Is a place I want to visit with friends											
	Is a place I want to visit with my family											
	Is a great place for holidays that avoid surprises	Strength										
	Is a place where I can experience things that I can't experience at home	Weakness									Strength	
	Is an environmentally-friendly travel destination	Strength			Strength	Weakness		Weakness				
	Is a socially responsible travel destination	Strength		Weakness	Strength					Weakness		
	Is a place trending as a must-visit spot											
To-Do	Offers activities that are physically challenging						Weakness					
	Is a great place for shopping and browsing through stores				Weakness			Weakness	Weakness		Strength	Strength
	Its cities have a lot of great attractions to see and do				Weakness							Strength
	Has great outdoor activities I would participate in			Weakness			Weakness					
	Has great dining and food experiences	Weakness	Weakness		Weakness			Strength				
	Has a great arts and music scene				Weakness			Strength		Weakness		Strength
	Has appealing festivals and events	Weakness			Weakness	Strength		Strength				
To-See	Its cities have a great atmosphere				Weakness		Strength					
	Has beautiful outdoor scenery and landscapes								Strength		Weakness	
	Is a great place to see wildlife in its natural habitat	Strength	Strength	Weakness			Weakness	Weakness	Strength	Weakness	Weakness	
	Has great historical or heritage sites and experiences	Weakness	Weakness	Strength	Weakness	Strength	Strength	Strength				
	Has a culture that I would want to experience	Weakness						Strength				Weakness

Strength | Weakness

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 [DESTINATION]
C6. We are interested in your general impressions about destinations even if you have never been there. Please select all the destinations you think apply to the statement. Select "None of these" if you think none of the destinations apply.

Brand Value Statements: Among Total Germany

DESTINATION CANADA

When it comes to brand value statements, Canada is associated with being a place where nature can be enjoyed near cities and a good place to live. However, Canada also has a relative weakness for cultural diversity and having a distinct identity.

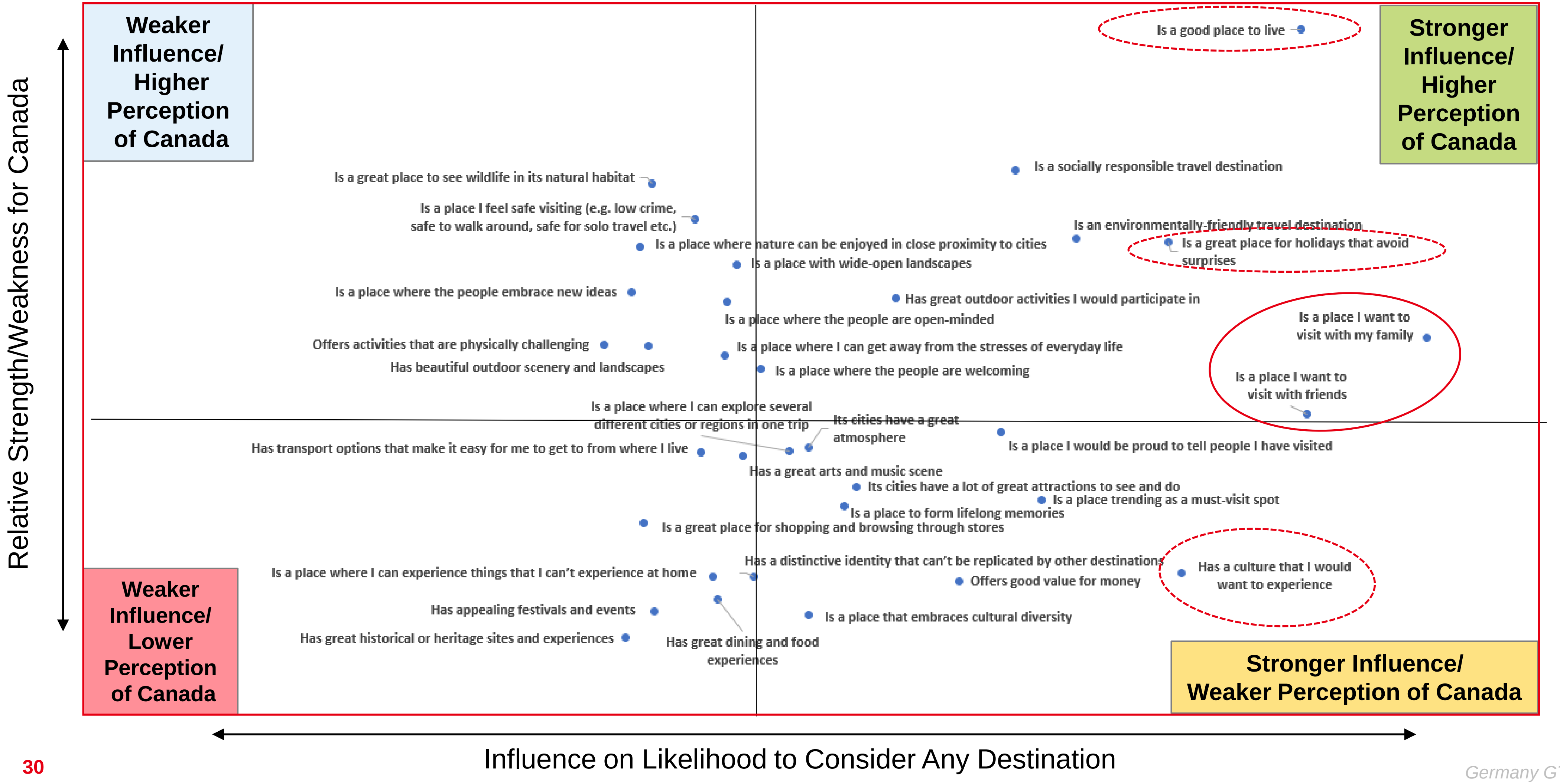
	Canada	Australia	China	Iceland	India	Japan	Mexico	South Africa	Thailand	United Arab Emirates	United States
n=	1518	456	455	455	456	455	455	455	456	456	455
Is a place with wide-open landscapes		Strength				Weakness		Strength	Weakness	Weakness	
Is a place where nature can be enjoyed in close proximity to cities	Strength		Weakness	Strength				Strength			
Is a place that embraces cultural diversity	Weakness		Strength	Weakness	Strength						
Is a place where the people are welcoming											Weakness
Is a place where the people are open-minded			Weakness			Weakness					
Is a place where the people embrace new ideas											
Is a good place to live	Strength	Strength	Weakness		Weakness		Weakness	Weakness			
Has a distinctive identity that can't be replicated by other destinations	Weakness										

Strength | Weakness

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 [DESTINATION]
C6. We are interested in your general impressions about destinations even if you have never been there. Please select all the destinations you think apply to the statement. Select "None of these" if you think none of the destinations apply.

Canada Strengths & Opportunities: Total Germany

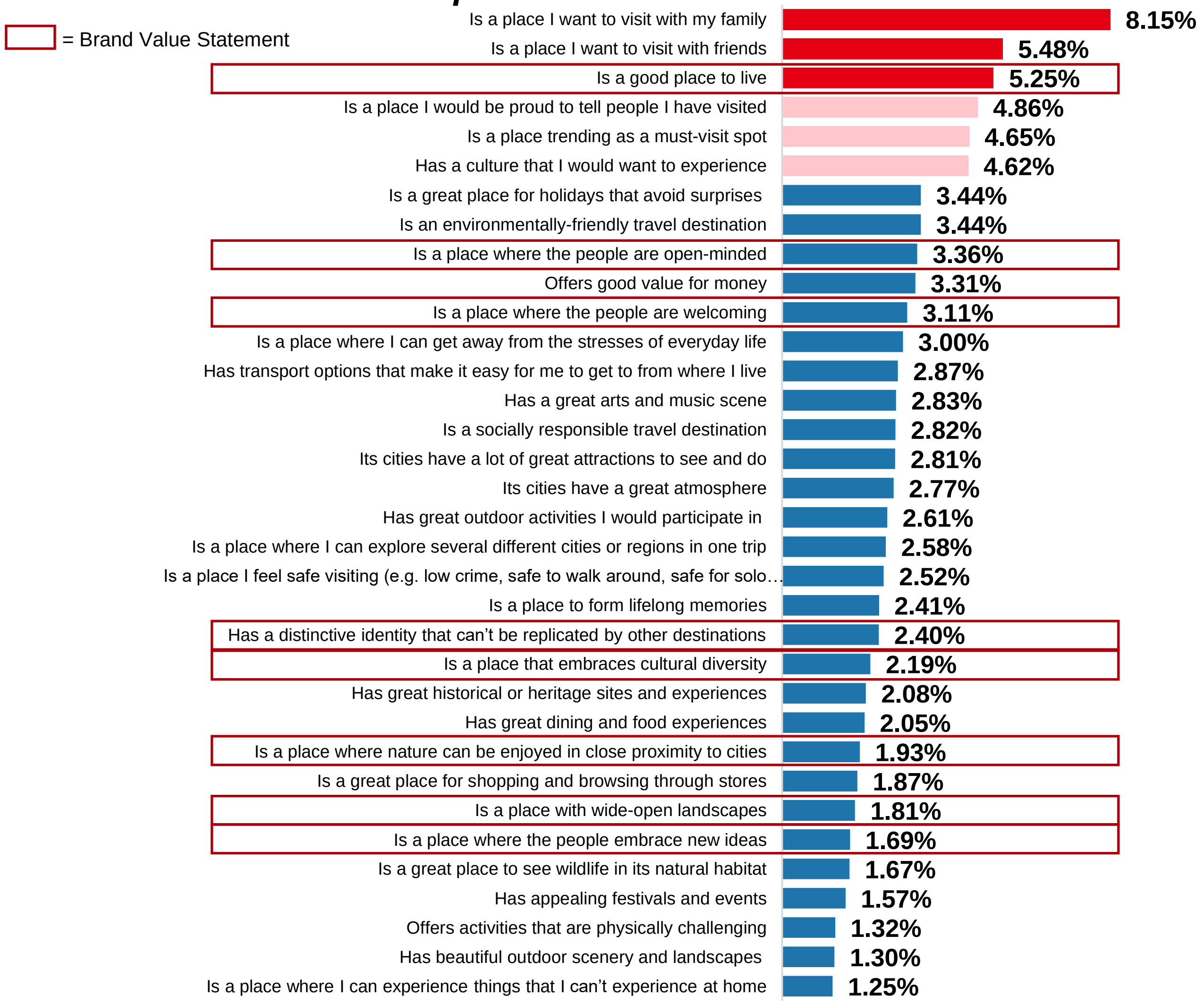
Given the strong influence on consideration, being a place I want to visit with my friends and family are dimensions that could be prioritized. Efforts to strengthen and sustain perceptions of being a good place to live, socially responsible and environmentally friendly could also help to drive destination consideration.



Destination Attributes: Drivers Analysis: Among HVG Audience

DESTINATION CANADA

Top drivers for HVGs are similar to overall, including: visiting with family and friends and a good place to live. Amongst the HVG audience, pride to tell people you've visited, trending as a must visit spot and having an experiential culture are also important.



Description

Key drivers analysis (KDA) seeks to identify the strongest predictors of a dependent variable. In this case, we used consideration of a destination (C2) as the dependent variable. The analysis uses a mix of linear and logistic regressions, assessing the simultaneous effect of many independent variables, destination attributes (C6) while controlling for each other.

Interpretation

Attributes with a high percentage level are more likely to impact consideration of a destination. This generally means that destinations that score highly on the top attributes may have higher consideration levels. Each percentage does also indicate the degree of relative impact. An attribute with a score of 5% is twice as impactful on consideration as an attribute with a score of 2.5%.

Note: all respondents evaluated Canada plus 3 randomly selected countries from the competitive set.
Base: Long-haul pleasure travellers, HVG audience, (past 3 years or next 2 years)
C6. We are interested in your general impressions about destinations even if you have never been there. Please select all the destinations you think apply to the statement. Select "None of these" if you think none of the destinations apply.

Destination Attributes – Relative Strengths & Weaknesses : Among HVG Audience

Amongst HVGs, Canada stands out as environmentally-friendly, socially responsible and a great place to see wildlife in its natural habitat. Canada under-indexes on value for money, dining experiences, appealing festivals and great historical sites. However, there is also white space to explore among the HVG audience on dimensions not currently owned by any one destination.

DESTINATION CANADA

		Canada	Australia	China	Iceland	India	Japan	Mexico	South Africa	Thailand	United Arab Emirates	United States
	n=	456	162	133	130	133	128	143	144	129	141	125
Higher Order Motivations	Is a place where I can get away from the stresses of everyday life			Weakness	Strength							Weakness
	Is a place to form lifelong memories											
	Is a place I would be proud to tell people I have visited											
General Needs	Is a place I feel safe visiting (e.g. low crime, safe to walk around, safe for solo travel etc.)				Strength	Weakness	Strength	Weakness	Weakness		Strength	
	Is a place where I can explore several different cities or regions in one trip											
	Offers good value for money	Weakness	Weakness		Weakness	Strength	Weakness	Strength		Strength		
	Has transport options that make it easy for me to get to from where I live		Weakness	Strength								
Type of Trip	Is a place I want to visit with friends											
	Is a place I want to visit with my family											
	Is a great place for holidays that avoid surprises			Weakness								Strength
	Is a place where I can experience things that I can't experience at home	Weakness		Strength							Strength	Weakness
	Is an environmentally-friendly travel destination	Strength		Weakness	Strength			Weakness				
	Is a socially responsible travel destination	Strength			Strength					Weakness		
	Is a place trending as a must-visit spot											
To-Do	Offers activities that are physically challenging				Strength		Weakness					
	Is a great place for shopping and browsing through stores				Weakness	Weakness					Strength	Strength
	Its cities have a lot of great attractions to see and do				Weakness							
	Has great outdoor activities I would participate in											
	Has great dining and food experiences	Weakness	Weakness		Weakness			Strength			Strength	
	Has a great arts and music scene							Strength			Weakness	Strength
	Has appealing festivals and events	Weakness		Strength	Weakness			Strength				
To-See	Its cities have a great atmosphere				Weakness							
	Has beautiful outdoor scenery and landscapes										Weakness	
	Is a great place to see wildlife in its natural habitat	Strength	Strength				Weakness	Weakness	Strength		Weakness	
	Has great historical or heritage sites and experiences	Weakness	Weakness	Strength	Weakness	Strength	Strength					
	Has a culture that I would want to experience				Weakness			Strength				

Strength | Weakness

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), HVG Audience, Evaluated [DESTINATION]
C6. We are interested in your general impressions about destinations even if you have never been there. Please select all the destinations you think apply to the statement. Select "None of these" if you think none of the destinations apply.

Brand Value Statements: Among HVG Audience

In terms of the brand value statements, the HVG audience perceives Canada as a good place to live. However, Australia and South Africa have the edge on wide-open spaces. Embracing new ideas is more associated with Australia, linking nature in close proximity to cities to South Africa, and perceiving India as more culturally diverse.

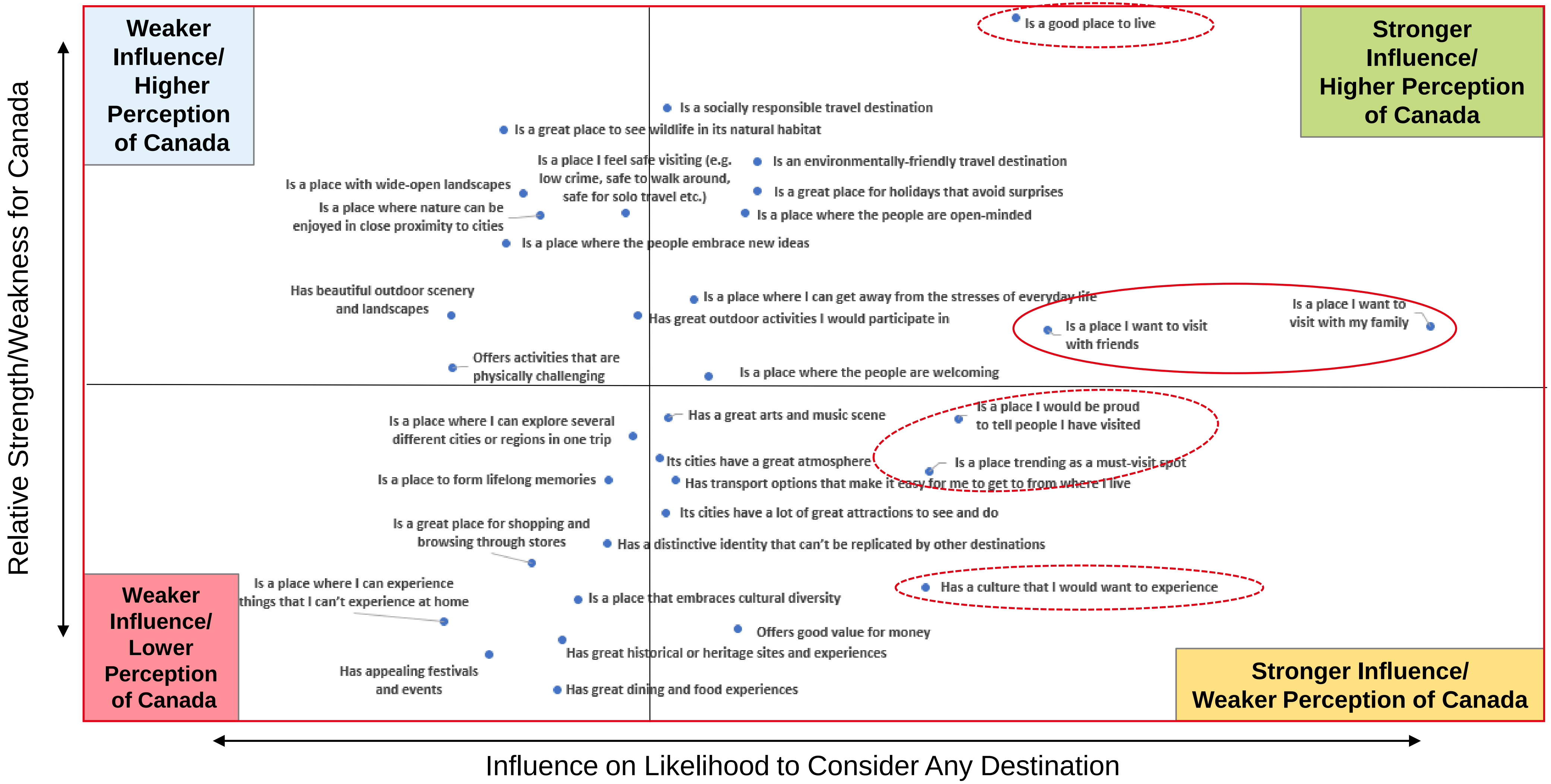
	Canada	Australia	China	Iceland	India	Japan	Mexico	South Africa	Thailand	United Arab Emirates	United States
n=	456	162	133	130	133	128	143	144	129	141	125
Is a place with wide-open landscapes											
Is a place where nature can be enjoyed in close proximity to cities											
Is a place that embraces cultural diversity											
Is a place where the people are welcoming											
Is a place where the people are open-minded											
Is a place where the people embrace new ideas											
Is a good place to live											
Has a distinctive identity that can't be replicated by other destinations											

Strength | Weakness

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), HVG Audience, Evaluated [DESTINATION]
C6. We are interested in your general impressions about destinations even if you have never been there. Please select all the destinations you think apply to the statement. Select "None of these" if you think none of the destinations apply.

Canada Strengths & Opportunities: Among HVG Audience

When it comes to priorities for targeting the HVG audience, being a place I want to visit with friends/ families would be the most impactful on consideration. Efforts to strengthen and sustain perceptions of being a good place to live, a must-visit spot, a place I would be proud to tell people I have visited and having an experiential culture could also help to drive destination consideration.

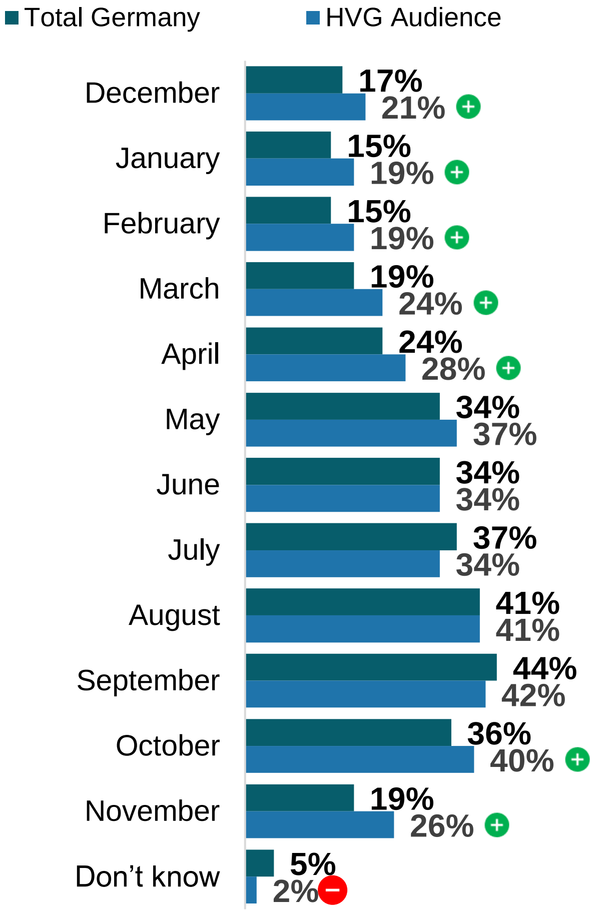


Increasing Fall/Winter Visitation

Demand by Season (Any Destination)

DESTINATION CANADA

Overall potential market size among Germans is highest in the Summer and Fall, followed by the Spring.



	Total Germany	HVG Audience	POTENTIAL MARKET SIZE* Total Germany	HVG Audience
Winter	32%	40% +	7,157,500	2,776,000
Spring	53%	57% +	12,020,000	3,976,000
Summer	62%	60%	14,042,000	4,213,000
Fall	62%	62%	14,042,000	4,332,000

** Calculation: Total potential long-haul pleasure travellers aged 18 years or more (22,722,000) x total in Germany typically travel during season*

** Calculation: Total potential HVG travellers (6,975,500) x total HVG typically travel during season*

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1518); HVG (n=456)
D1. In general, what time of year do you typically like to take holiday trips? Select all that apply

+ / − = significantly higher/lower result (vs. Total)

Top of Mind Fall/Winter Destinations

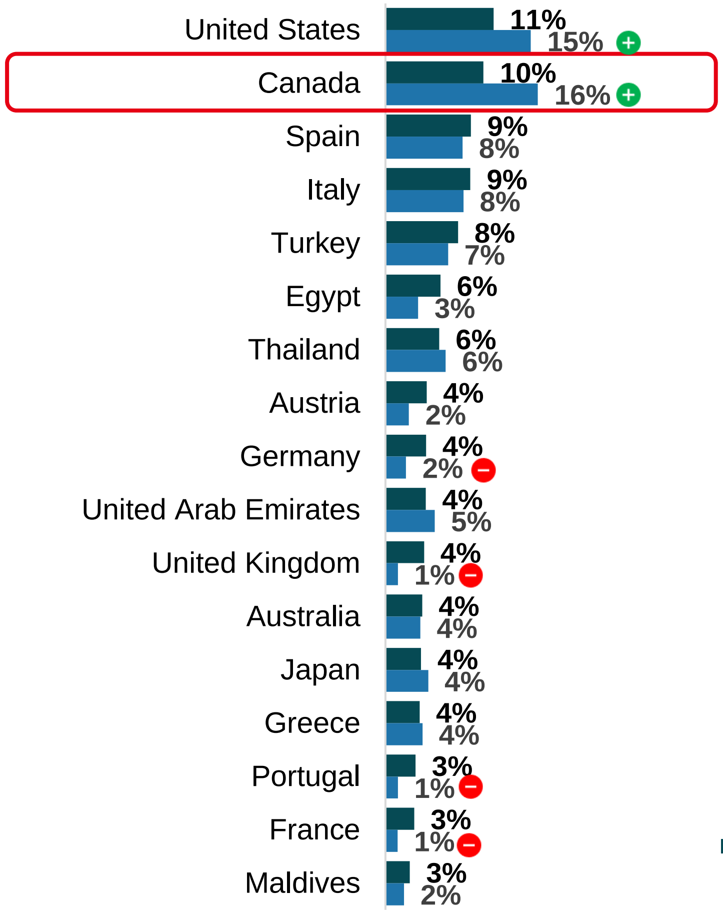
DESTINATION CANADA

Canada and the US are the top destinations that come to mind when thinking about travel to experience the Fall season. For Winter destinations, Canada is a distant third behind Austria and Switzerland.

Fall

Autumn Season Description

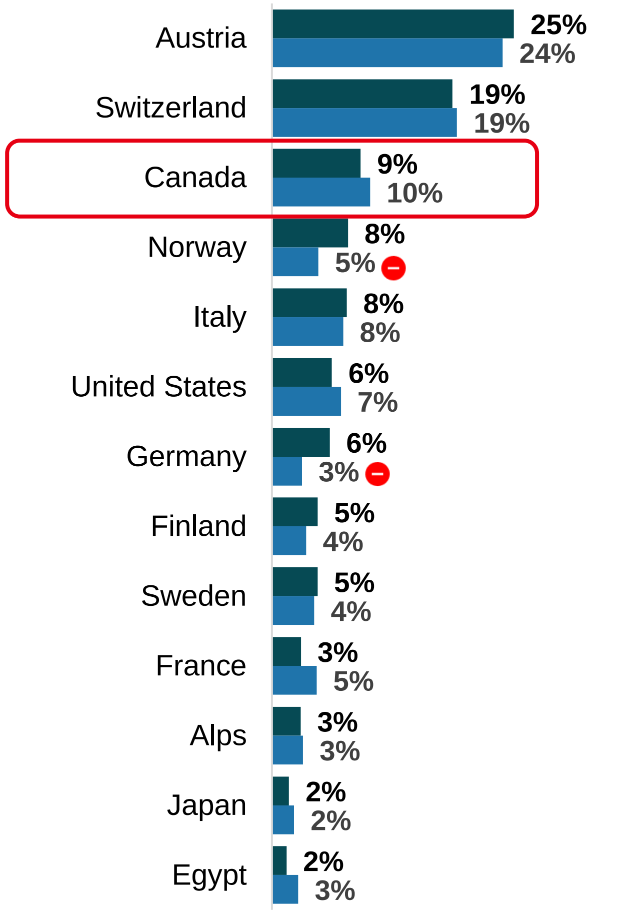
Autumn is the season between summer and winter. Autumn tends to be a slower season after the busy summer in most destinations. In some destinations, the weather becomes cooler and the leaves on trees shift to red, orange and yellow in preparation to shed. While autumn has some distinct activities and experiences, many summer activities can still be done in autumn



Winter

Winter Season Description

Winter is a season that is typically characterized by colder temperatures. During the winter months there are usually festivals, snow sports and holiday activities. It may snow in some destinations, allowing for skiing, snowboarding, outdoor spas and other winter activities.



■ Total Germany ■ HVG Audience

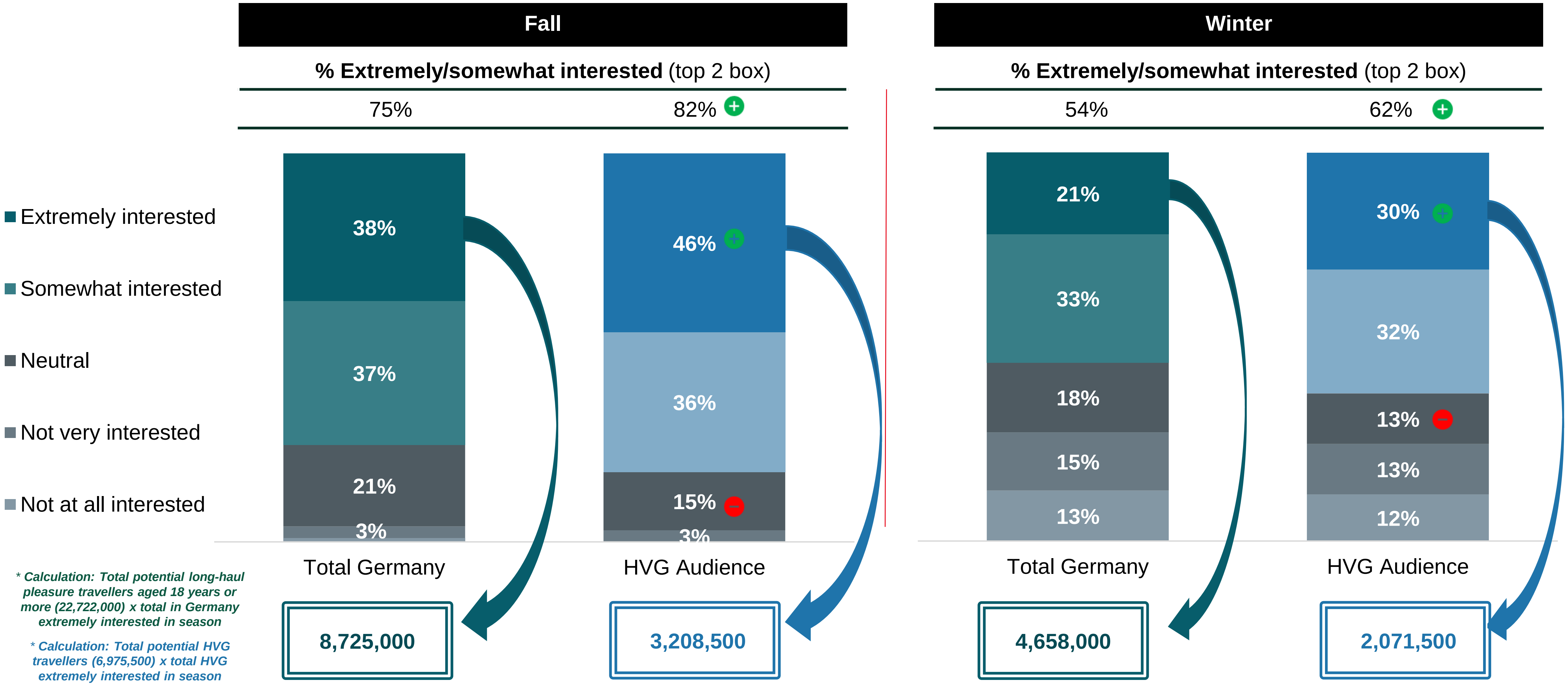
Note: respondents were asked either about winter travel (B2/D2) or fall travel (B3/D3) Base: Long-haul pleasure travellers (past 3 years or next 2 years)
B3. What destinations come to mind when thinking about travel to experience the **autumn season**? (Please list up to 3 destinations. You can mention 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. (n=787); HVG (n=238)
B2. What destinations come to mind when thinking about travel to experience the **winter season**? (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. (n=731); HVG (n=218)

+ / − = significantly higher/lower result (vs. Total)

Interest in Fall/Winter Holidays

DESTINATION CANADA

Interest in visiting a destination during its Fall season is almost double that of Winter among total German travellers. Fall and Winter interest is much higher amongst the HVG audience.



Note: respondents were asked either about winter travel (B2/D2) or fall travel (B3/D3)
Base: Long-haul pleasure travellers (past 3 years or next 2 years)
D3. In general, how interested are you in taking a holiday trip to a destination during **its autumn season**? (n=787); HVG (n=238)
D2. In general, how interested are you in taking a holiday trip to a destination during **its winter season**? (n=731); HVG (n=218)

+ / − = significantly higher/lower result (vs. Total)

Potential Market Size For Canada in Fall/Winter

DESTINATION CANADA

In terms of immediate potential for Canada, Fall has more than double the consideration than Winter.

	Total potential travellers aged 18 years or more		**Target Market for Canada** (Those in the dream to purchase stages of the path to purchase for Canada)		Size of the target market		**Consideration for Canada in [SEASON] in N2Y**		Immediate potential for Canada in N2Y
Long haul pleasure travellers	22,722,000	x	65.4%	=	14,860,000	x	Fall: 51.4%	=	Fall: 7,638,000
							Winter: 23.2%		Winter: 3,447,500
HVG travellers	6,975,500	x	68.2%	=	4,757,500	x	Fall: 57.1%	=	Fall: 2,716,500
							Winter: 29.0%		Winter: 1,379,500

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) Total (n=1518); HVG (n=456)
C7. For each of the following destinations, during which months would you consider taking a holiday trip in the next 2 years? Total (n=992); HVG (n=311)

Fall/Winter Conversion – Total Germany

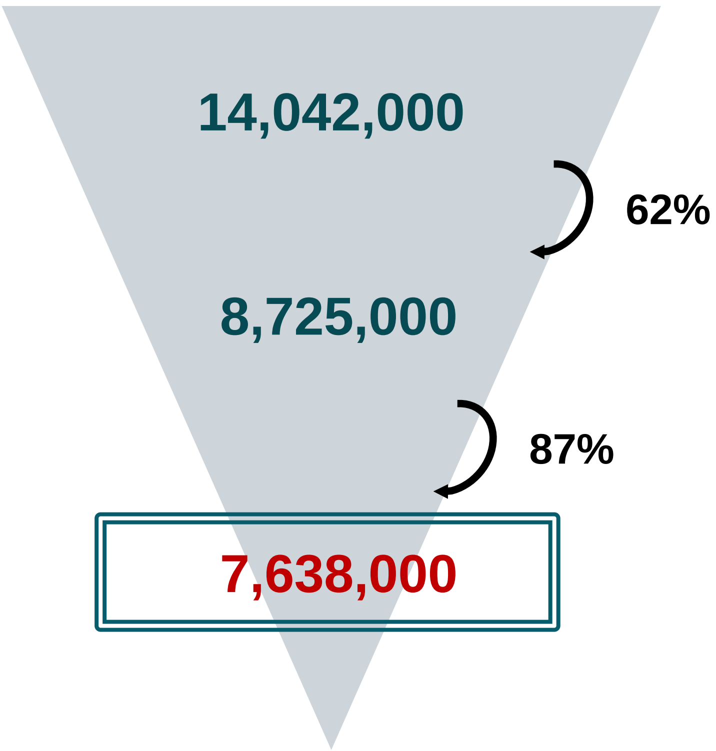
The conversion from those who typically travel during Fall and Winter to extreme interest in visiting during that season is about two thirds. Among those, Canada has stronger conversion to immediate potential during its Fall season.

Fall

Demand During Fall Months (any destination)

Extremely Interested in Visiting a Destination During its Fall Season (any destination)

Next 2 Year Immediate Potential for CANADA During Fall Season

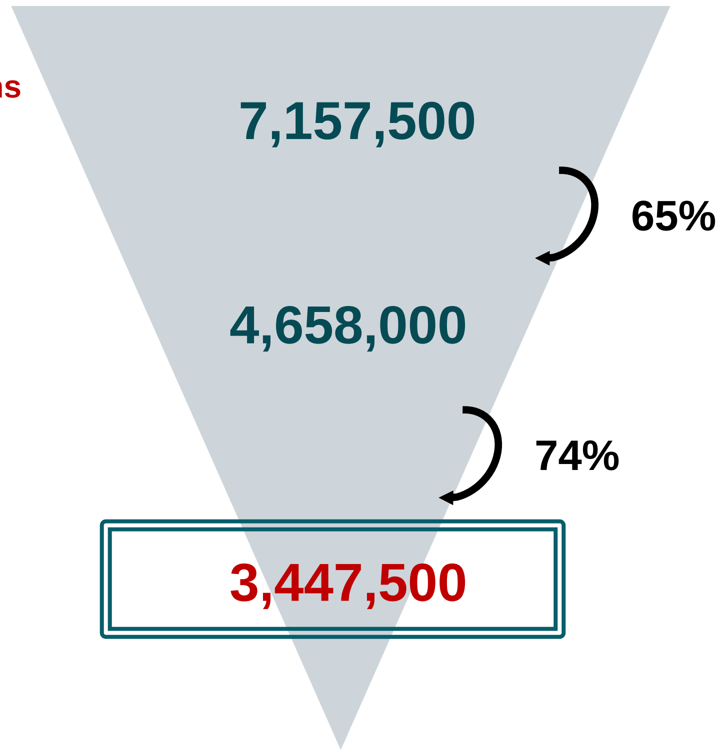


Winter

Demand During Winter Months (any destination)

Extremely Interested in Visiting a Destination During its Winter Season (any destination)

Next 2 Year Immediate Potential for CANADA During Winter Season



Base: Long-haul pleasure travellers (past 3 years or next 2 years)
D1. In general, what time of year do you typically like to take holiday trips? Select all that apply. Total (n=1518)
D3. In general, how interested are you in taking a holiday trip to a destination during **its fall season**? Total (n=787)
D2. In general, how interested are you in taking a holiday trip to a destination during **its winter season**? Total (n=731)
C7. For each of the following destinations, during which months would you consider taking a holiday trip in the next 2 years? Total (n=992)

Fall/Winter Conversion – Among HVG Audience

DESTINATION CANADA

Among HVGs, the conversion from those who typically travel during Fall and Winter to extreme interest in visiting during that season is about three quarters. Among those, Canada has stronger conversion to immediate potential during its Fall season.

Fall

Demand During Fall Months (any destination): 4,332,000

74%

Extremely Interested in Visiting a Destination During its Fall Season (any destination): 3,208,500

85%

Next 2 Year Immediate Potential for CANADA During Fall Season: 2,716,500

Winter

Demand During Winter Months (any destination): 2,776,000

75%

Extremely Interested in Visiting a Destination During its Winter Season (any destination): 2,071,500

67%

Next 2 Year Immediate Potential for CANADA During Winter Season: 1,379,500

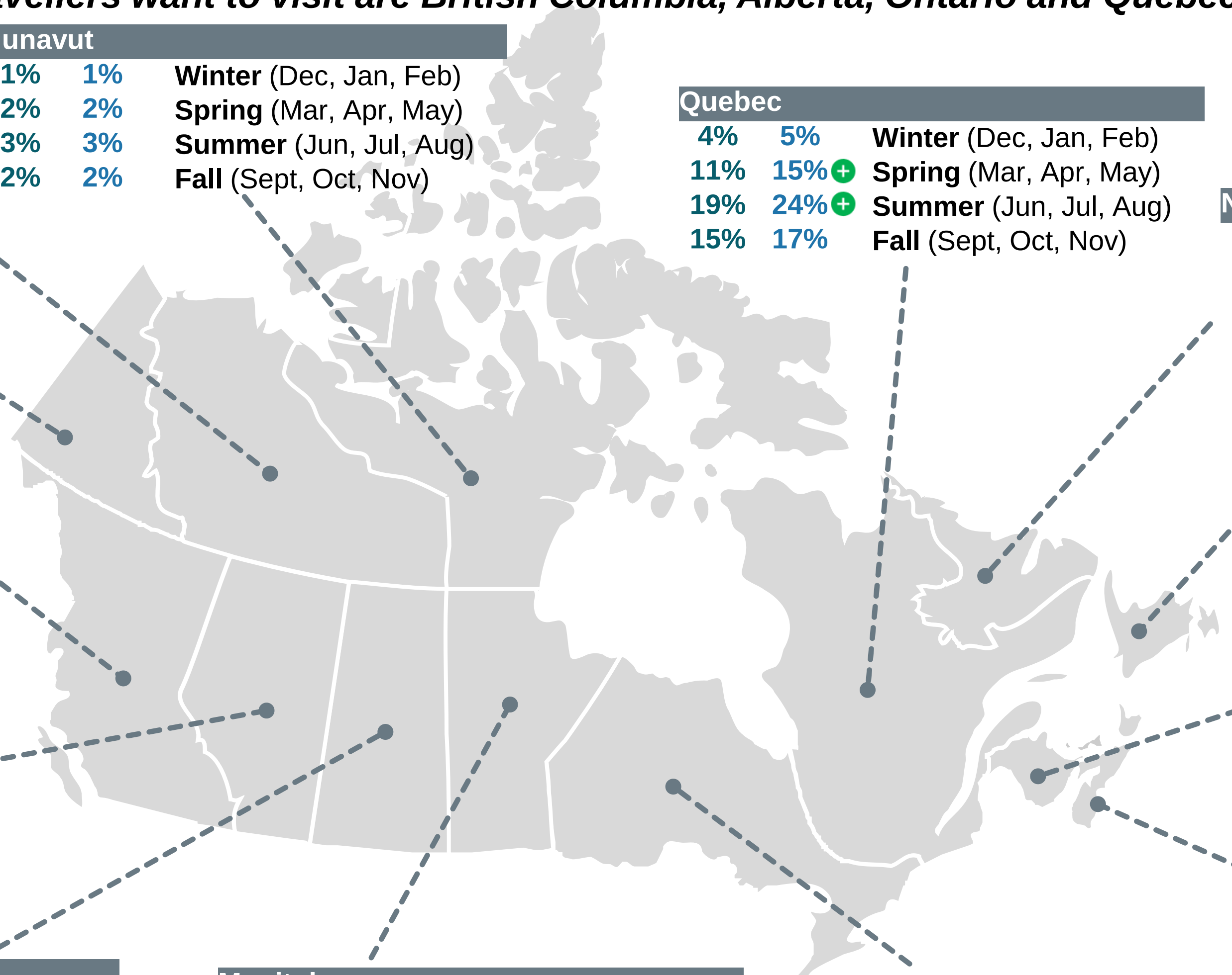
Base: Long-haul pleasure travellers (past 3 years or next 2 years), HVG Audience
D1. In general, what time of year do you typically like to take holiday trips? Select all that apply. HVG (n=456)
D3. In general, how interested are you in taking a holiday trip to a destination during **its fall season**? HVG (n=238)
D2. In general, how interested are you in taking a holiday trip to a destination during **its winter season**? HVG (n=218)
C7. For each of the following destinations, during which months would you consider taking a holiday trip in the next 2 years? HVG (n=311)

Time of Year Interested in Visiting Canada (Next 2 Years)

DESTINATION CANADA

The main provinces that German travellers want to visit are British Columbia, Alberta, Ontario and Quebec.

Total Germany | HVG Audience



Northwest Territories

Total Germany	HVG Audience	
1%	1%	**Winter** (Dec, Jan, Feb)
4%	3%	**Spring** (Mar, Apr, May)
7%	8%	**Summer** (Jun, Jul, Aug)
5%	5%	**Fall** (Sept, Oct, Nov)

Nunavut

Total Germany	HVG Audience	
1%	1%	**Winter** (Dec, Jan, Feb)
2%	2%	**Spring** (Mar, Apr, May)
3%	3%	**Summer** (Jun, Jul, Aug)
2%	2%	**Fall** (Sept, Oct, Nov)

Quebec

Total Germany	HVG Audience	
4%	5%	**Winter** (Dec, Jan, Feb)
11%	15% (+)	**Spring** (Mar, Apr, May)
19%	24% (+)	**Summer** (Jun, Jul, Aug)
15%	17%	**Fall** (Sept, Oct, Nov)

Newfoundland & Labrador

Total Germany	HVG Audience	
2%	2%	**Winter** (Dec, Jan, Feb)
5%	7% (+)	**Spring** (Mar, Apr, May)
8%	9%	**Summer** (Jun, Jul, Aug)
6%	6%	**Fall** (Sept, Oct, Nov)

Yukon

Total Germany	HVG Audience	
2%	3%	**Winter** (Dec, Jan, Feb)
6%	9% (+)	**Spring** (Mar, Apr, May)
9%	9%	**Summer** (Jun, Jul, Aug)
6%	5%	**Fall** (Sept, Oct, Nov)

Prince Edward Island

Total Germany	HVG Audience	
2%	2%	**Winter** (Dec, Jan, Feb)
4%	6% (+)	**Spring** (Mar, Apr, May)
6%	9% (+)	**Summer** (Jun, Jul, Aug)
4%	6%	**Fall** (Sept, Oct, Nov)

British Columbia

Total Germany	HVG Audience	
5%	7%	**Winter** (Dec, Jan, Feb)
14%	17%	**Spring** (Mar, Apr, May)
27%	32% (+)	**Summer** (Jun, Jul, Aug)
21%	23%	**Fall** (Sept, Oct, Nov)

New Brunswick

Total Germany	HVG Audience	
1%	2%	**Winter** (Dec, Jan, Feb)
3%	5%	**Spring** (Mar, Apr, May)
5%	6%	**Summer** (Jun, Jul, Aug)
4%	4%	**Fall** (Sept, Oct, Nov)

Alberta

Total Germany	HVG Audience	
5%	7% (+)	**Winter** (Dec, Jan, Feb)
12%	16% (+)	**Spring** (Mar, Apr, May)
20%	20%	**Summer** (Jun, Jul, Aug)
16%	16%	**Fall** (Sept, Oct, Nov)

Nova Scotia

Total Germany	HVG Audience	
2%	3%	**Winter** (Dec, Jan, Feb)
3%	5%	**Spring** (Mar, Apr, May)
7%	9%	**Summer** (Jun, Jul, Aug)
7%	8%	**Fall** (Sept, Oct, Nov)

Saskatchewan

Total Germany	HVG Audience	
2%	3% (+)	**Winter** (Dec, Jan, Feb)
5%	6%	**Spring** (Mar, Apr, May)
7%	10% (+)	**Summer** (Jun, Jul, Aug)
4%	7% (+)	**Fall** (Sept, Oct, Nov)

Manitoba

Total Germany	HVG Audience	
2%	3%	**Winter** (Dec, Jan, Feb)
5%	7% (+)	**Spring** (Mar, Apr, May)
7%	10% (+)	**Summer** (Jun, Jul, Aug)
5%	6%	**Fall** (Sept, Oct, Nov)

Ontario

Total Germany	HVG Audience	
4%	3%	**Winter** (Dec, Jan, Feb)
16%	19%	**Spring** (Mar, Apr, May)
26%	26%	**Summer** (Jun, Jul, Aug)
20%	19%	**Fall** (Sept, Oct, Nov)

Base: Those in the dream to purchase stages of the path to purchase for Canada & definitely/likely to take a trip to Canada (n=992); HVG (n=311)
E3a-m. During what time of year are you considering visiting [PROVINCE]? (Select all that apply)

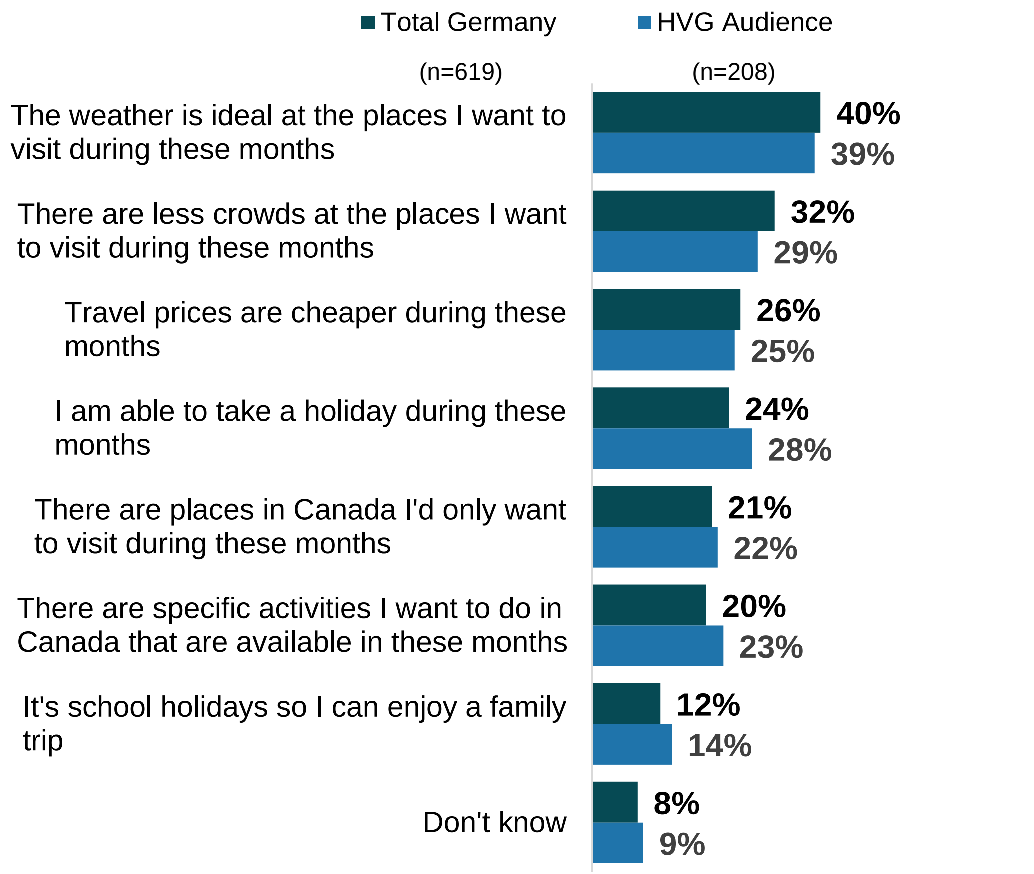
(+) / (−) = significantly higher/lower result (vs. Total)

Motivators & Barriers for Fall Travel to Canada

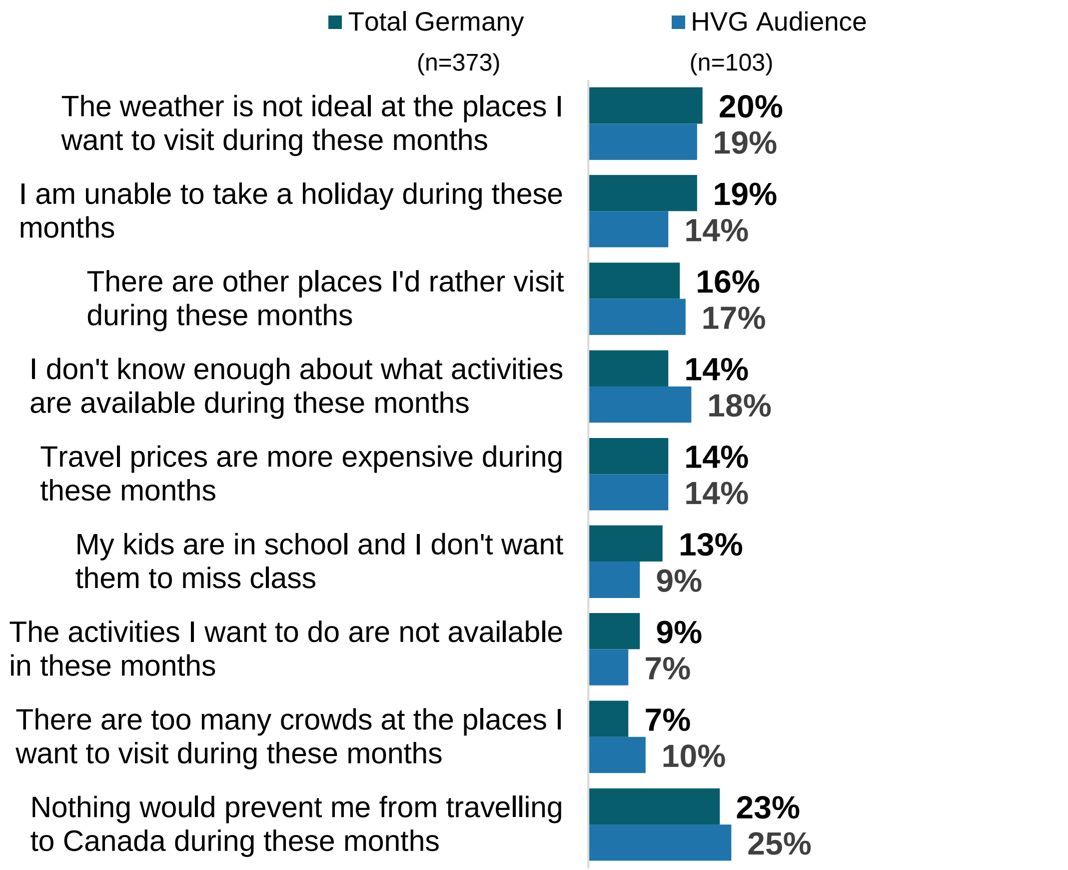
DESTINATION CANADA

In the Fall, weather is both the biggest motivation and barrier for travellers. Being unable to take a holiday is also a deterrent for travelling in the Fall.

Motivators for Fall Travel



Barriers for Fall Travel



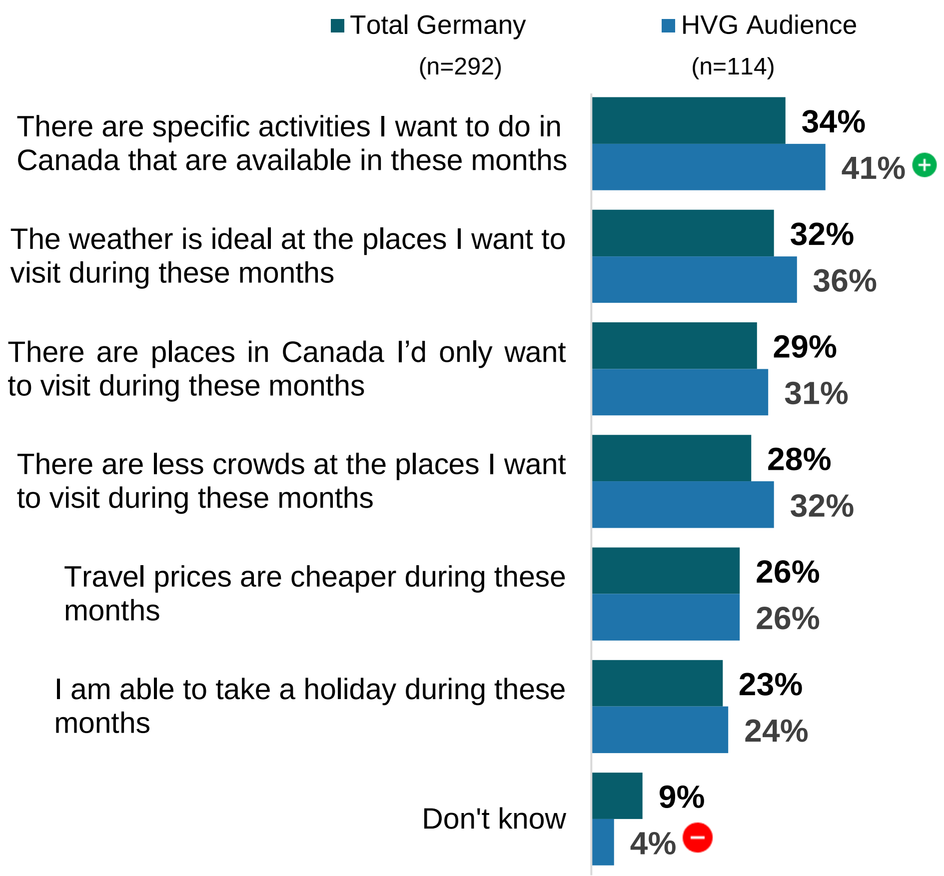
Base: Those in the dream to purchase stages of the path to purchase for Canada and considering visiting Canada or any province/territory in September, October or November
E6a. You indicated earlier that you are considering taking a holiday to **Canada** during the months of September, October and/or November… Which of the following describes why you would be interested in travelling to Canada for a holiday during these **autumn months**?
Base: Those in the dream to purchase stages of the path to purchase for Canada and not considering visiting Canada or any province/territory in September, October or November
E7. You indicated earlier that you are not considering taking a holiday to **Canada** during the months of September, October and/or November… Which of the following describes why you would **not** be interested in travelling to Canada for a holiday during these **autumn months**?

+ / − = significantly higher/lower result (vs. Total)

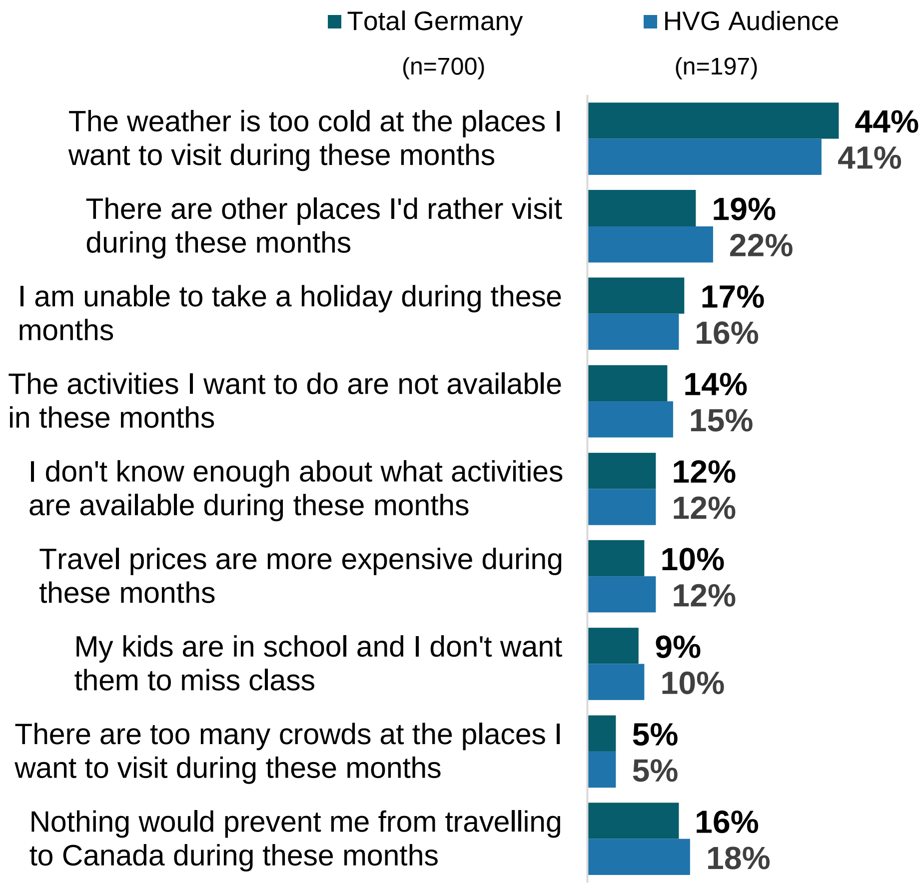
Motivators & Barriers for Winter Travel to Canada

When it comes to Winter travel, one third of Germans are motivated by the activities or weather while almost half see the weather as an obstacle for travelling. Of note is the 19% who say there are other places they'd rather visit during those months.

Motivators for Winter Travel



Barriers for Winter Travel



Base: Those in the dream to purchase stages of the path to purchase for Canada and considering visiting Canada or any province/territory in December, January or February
E8a. You indicated earlier that you are considering taking a holiday to **Canada** during the months of December, January and/or February… Which of the following describes why you would be interested in travelling to Canada for a holiday during these **winter months**?
Base: Those in the dream to purchase stages of the path to purchase for Canada and not considering visiting Canada or any province/territory in December, January or February
E9. You indicated earlier that you are not considering taking a holiday to **Canada** during the months of December, January and/or February… Which of the following describes why you would **not** be interested in travelling to Canada for a holiday during these **winter months**?

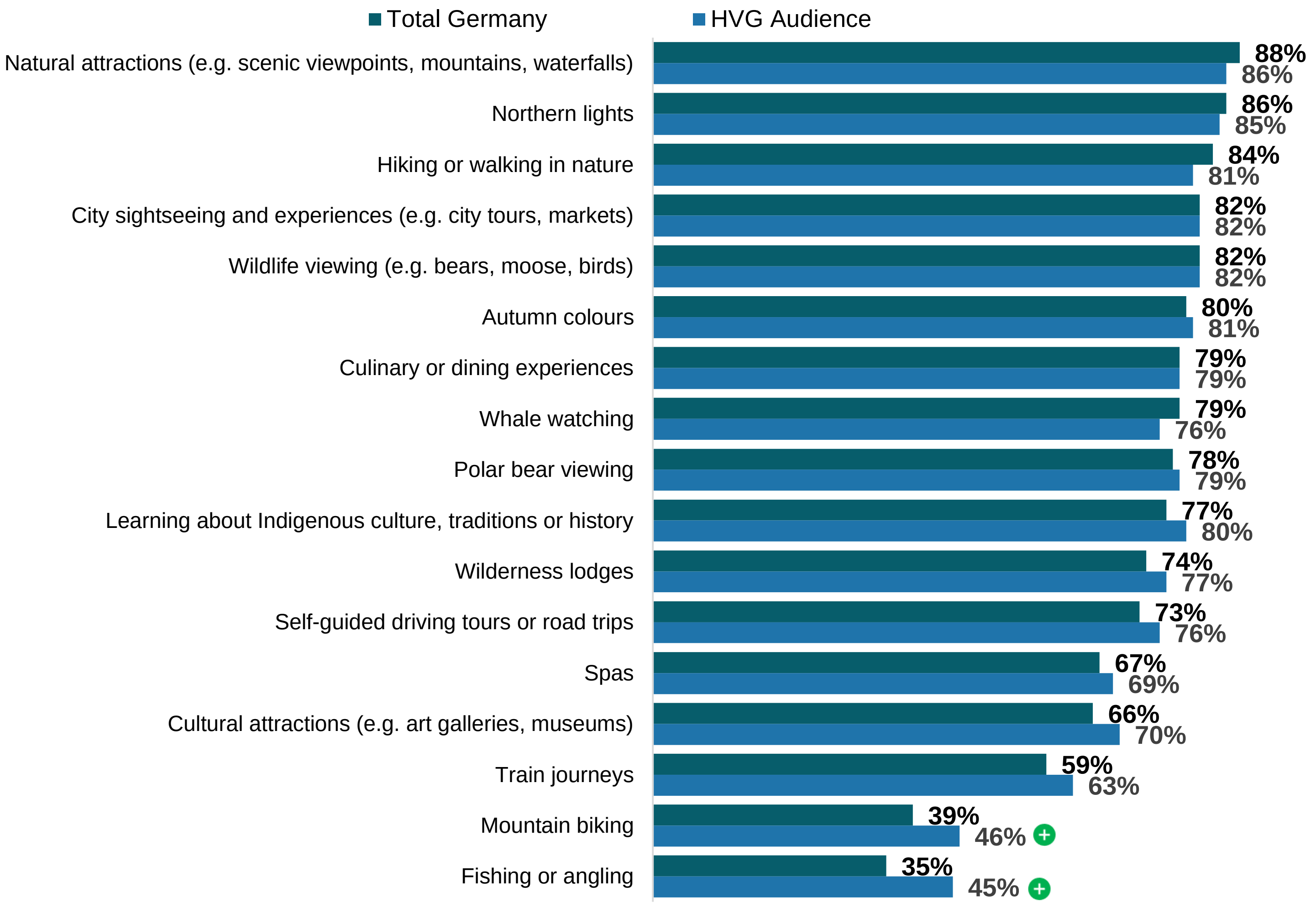
+ / − = significantly higher/lower result (vs. Total)

Interest in Fall Activities in Canada

DESTINATION CANADA

Natural attractions, Northern lights and hiking in nature are Fall activities Germans are most interested in for a trip to Canada.

% Somewhat/Very interested



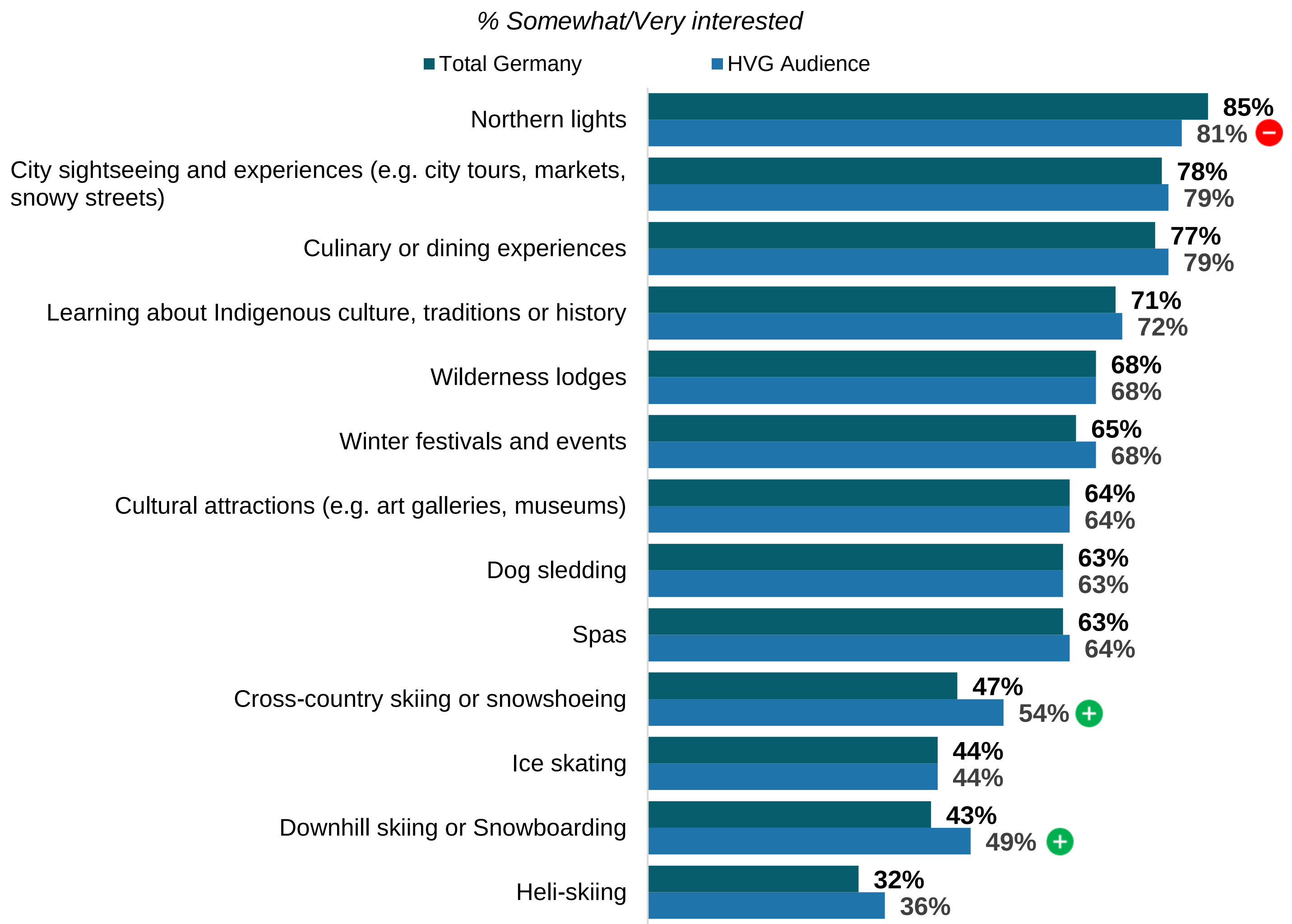
Base: Those in the dream to purchase stages of the path to purchase for Canada (n=992); HVG (n=311)
E11. What is your level of interest in the following activities or experiences in Canada during the autumn season?

+ / − = significantly higher/lower result (vs. Total)

Interest in Winter Activities in Canada

DESTINATION CANADA

In the Winter, seeing the Northern lights, city sightseeing, and culinary experiences are the activities German travellers are most interested in experiencing in Canada. HVGs have an elevated interest in snow sports.



Base: Those in the dream to purchase stages of the path to purchase for Canada (n=992); HVG (n=311)
E10. What is your level of interest in the following activities or experiences in Canada during the winter season?

+ / − = significantly higher/lower result (vs. Total)

Sustainability

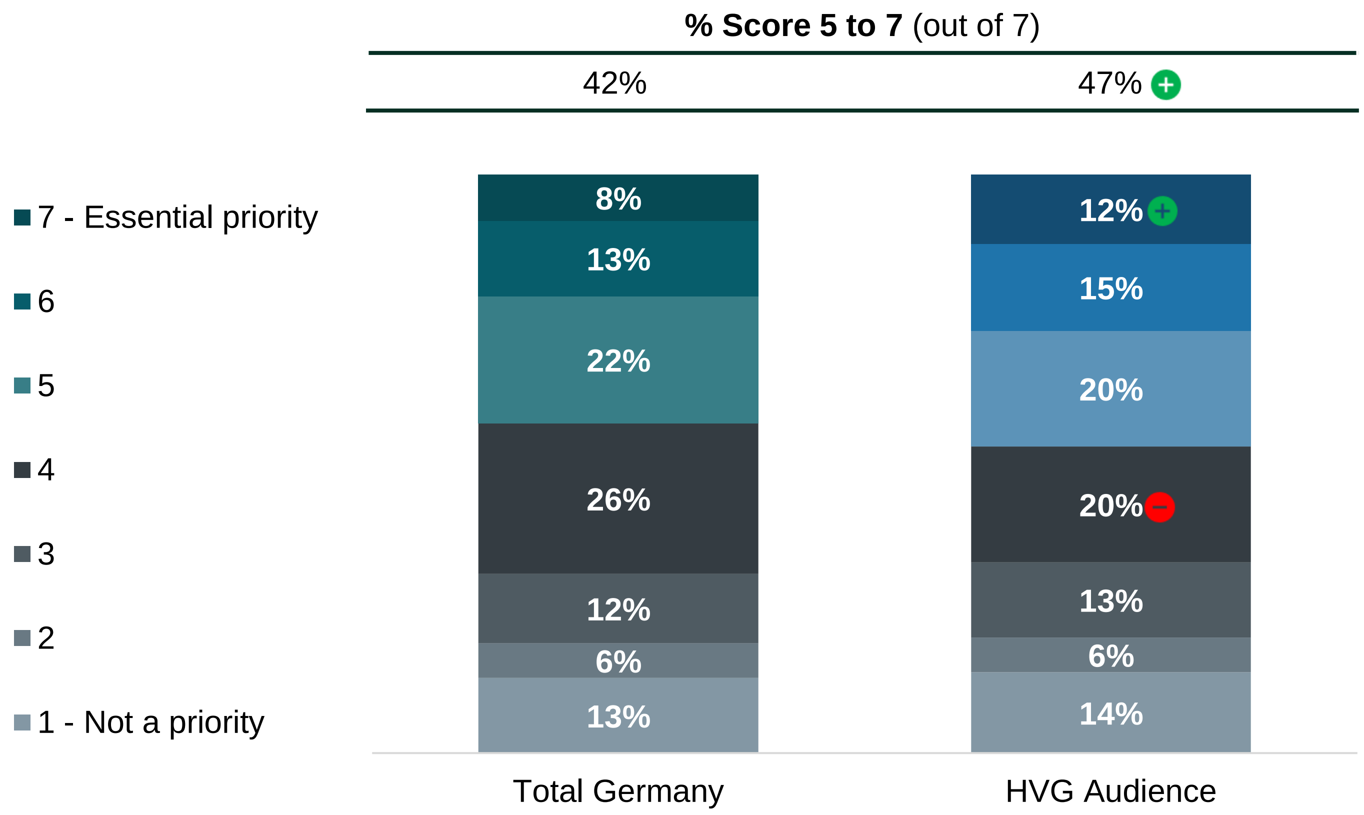
Churchill

Manitoba

Priority of Sustainable Travel When Planning a Trip

DESTINATION CANADA

Sustainable travel when planning a trip is not an essential priority for most German travellers, although it is somewhat more important among HVGs. Canada is most likely to be perceived as a socially responsible travel destination but falls behind Iceland on being environmentally-friendly.



% Associate [DESTINATION] with…	*Is a socially responsible travel destination*		*Is an environmentally-friendly travel destination*	
	Total Germany	HVG	Total Germany	HVG
Canada	48%	53% +	36%	43% +
Iceland	44%	46%	45%	45%
Australia	36%	39%	23%	26%
United States	28%	33%	19%	25% +

Sustainable Travel Description

Sustainable travel refers to "travel that minimizes any negative impacts on the destination's environment, economy and society, while making positive contributions to the local people and conserving the destination's natural and cultural heritage".

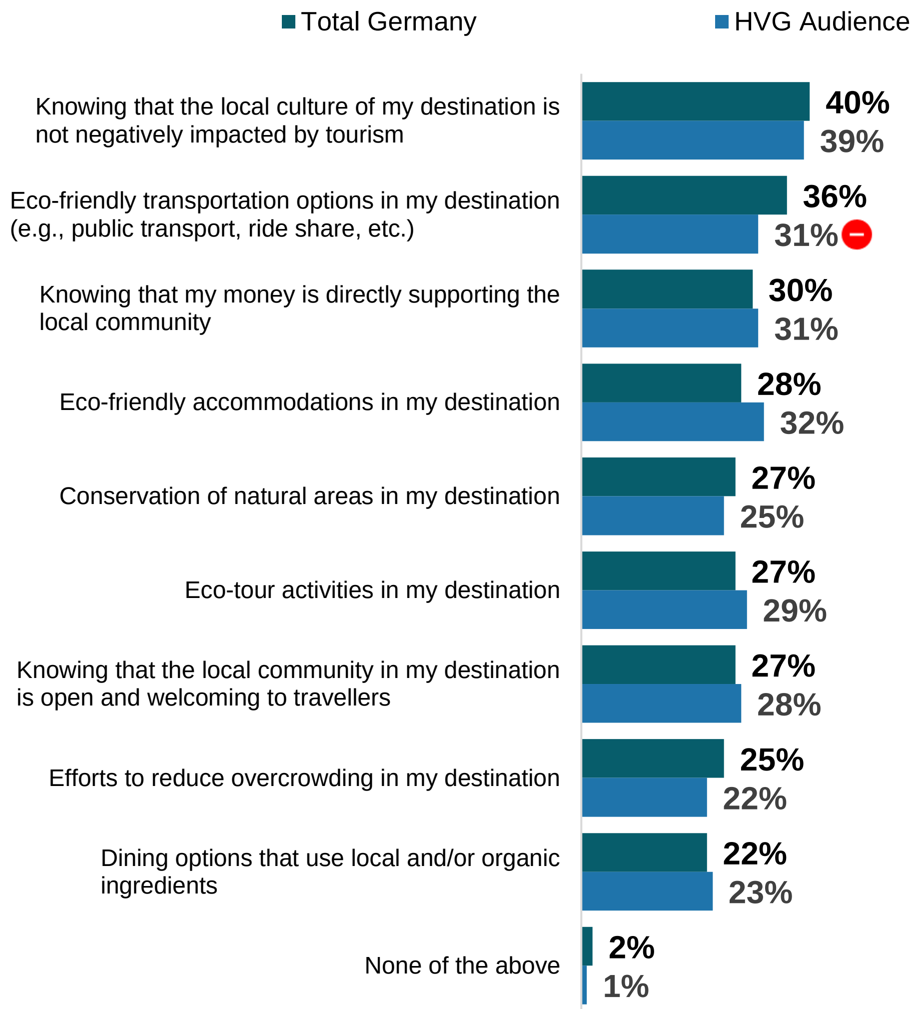
Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1518); HVG (n=456)
D7. [DESCRIPTION] How much of a priority is sustainable travel to you when you are planning a trip? Please use a 7-point scale, where 7 means 'essential priority' and 1 means 'not a priority'.
C6. We are interested in your general impressions about destinations even if you have never been there. Please select all the destinations you think apply to the statement. Select "None of these" if you think none of the destinations apply.

+ / − = significantly higher/lower result (vs. Total)

Top 3 Most Important Sustainability Efforts

DESTINATION CANADA

When it comes to sustainability efforts, the two most important for German travellers are the local culture not being negatively impacted and having eco-friendly transport options. HVGs place equal level of importance on having eco-friendly accommodations and knowing their money is directly supporting the local community as having eco-friendly transport options.



Sustainable Travel Description

Sustainable travel refers to "travel that minimizes any negative impacts on the destination's environment, economy and society, while making positive contributions to the local people and conserving the destination's natural and cultural heritage".

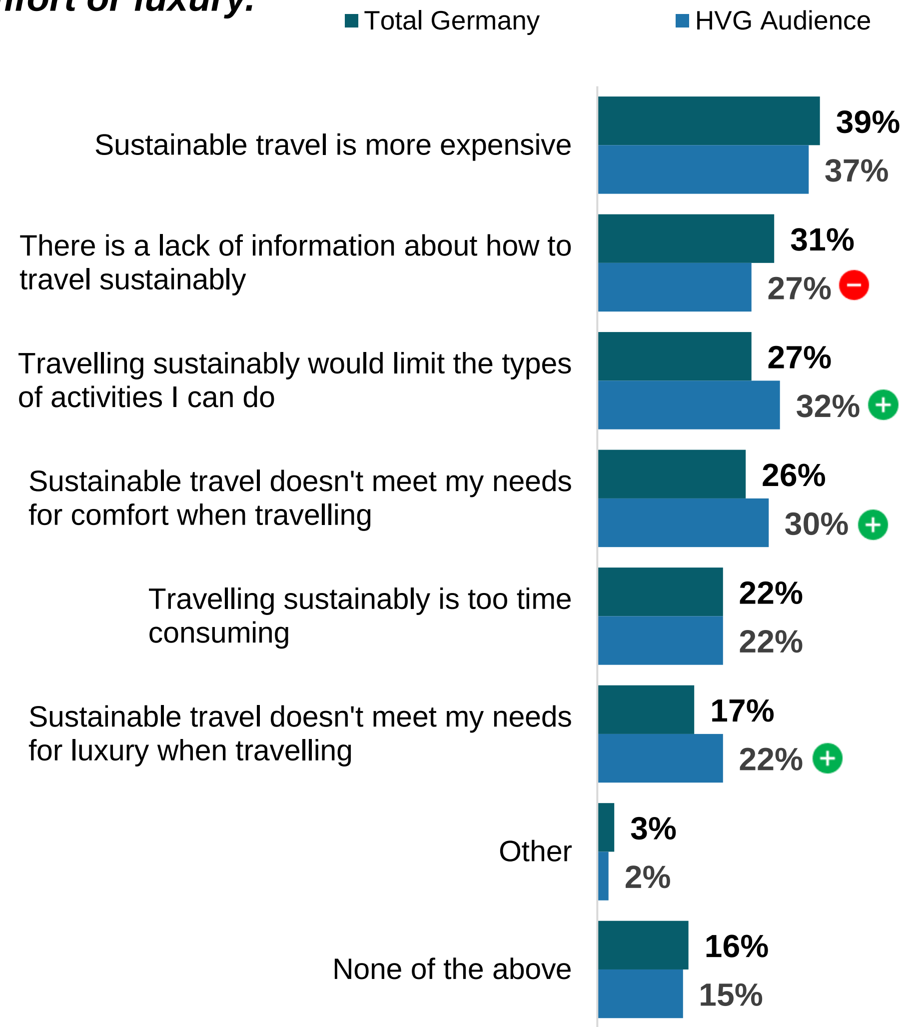
Base: Long-haul pleasure travellers (past 3 years or next 2 years), Rated 5-7 at D7 (n=643); HVG (n=215)
D8. What are the top 3 sustainability efforts that are most important to you when selecting a holiday destination? Select up to three choices.

+ / − = significantly higher/lower result (vs. Total)

Barriers to Sustainable Travel

DESTINATION CANADA

The primary barrier to sustainable travel is the perceived expense among both German travellers and the HVG audience. HVGs are more likely to say travelling sustainably would limit the types of activities and doesn't meet their needs for comfort or luxury.



Sustainable Travel Description

Sustainable travel refers to "travel that minimizes any negative impacts on the destination's environment, economy and society, while making positive contributions to the local people and conserving the destination's natural and cultural heritage".

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1518); HVG (n=456)
D9. Which of the following factors prevents you from choosing sustainable travel options? Select all that apply.

+ / − = significantly higher/lower result (vs. Total)

Indigenous Tourism

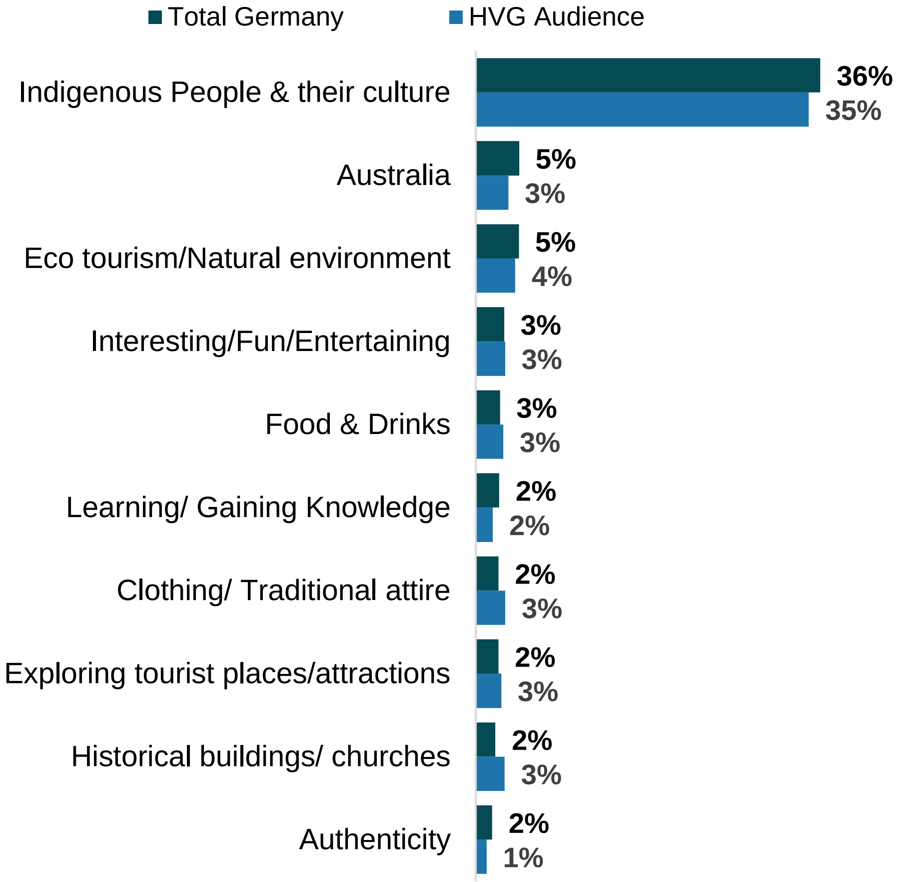
Unaided Mentions – Indigenous Cultural & Tourism Activities

When it comes to Indigenous culture, there is no specific activity that comes to mind for German travellers. Australia has the highest unaided mentions as an Indigenous tourism destination, followed by the US.

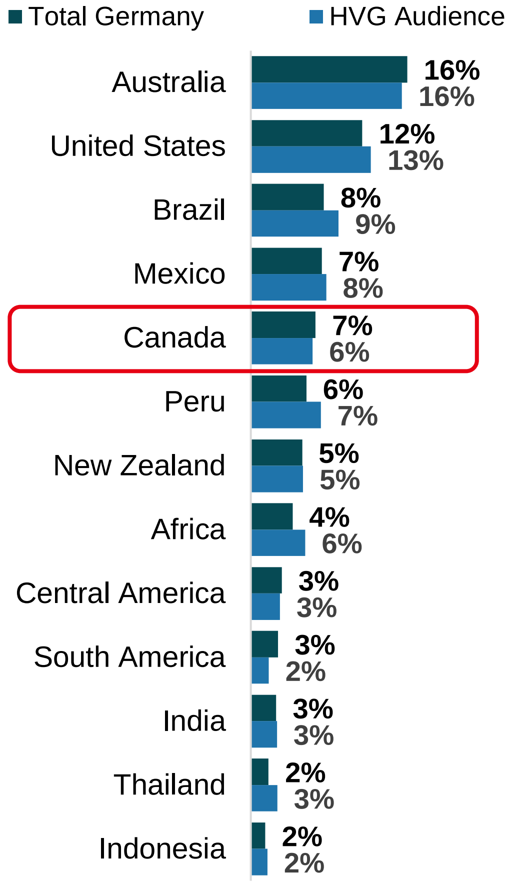
Indigenous Peoples Description

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.

Activities



Tourism Destinations



Base: Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1518); HVG (n=456)
D6. [DESCRIPTION] What comes to mind first when thinking about **Indigenous cultural and tourism activities or experiences**?
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.) Please note: You do not have to limit your responses to destinations you are considering for a holiday trip.

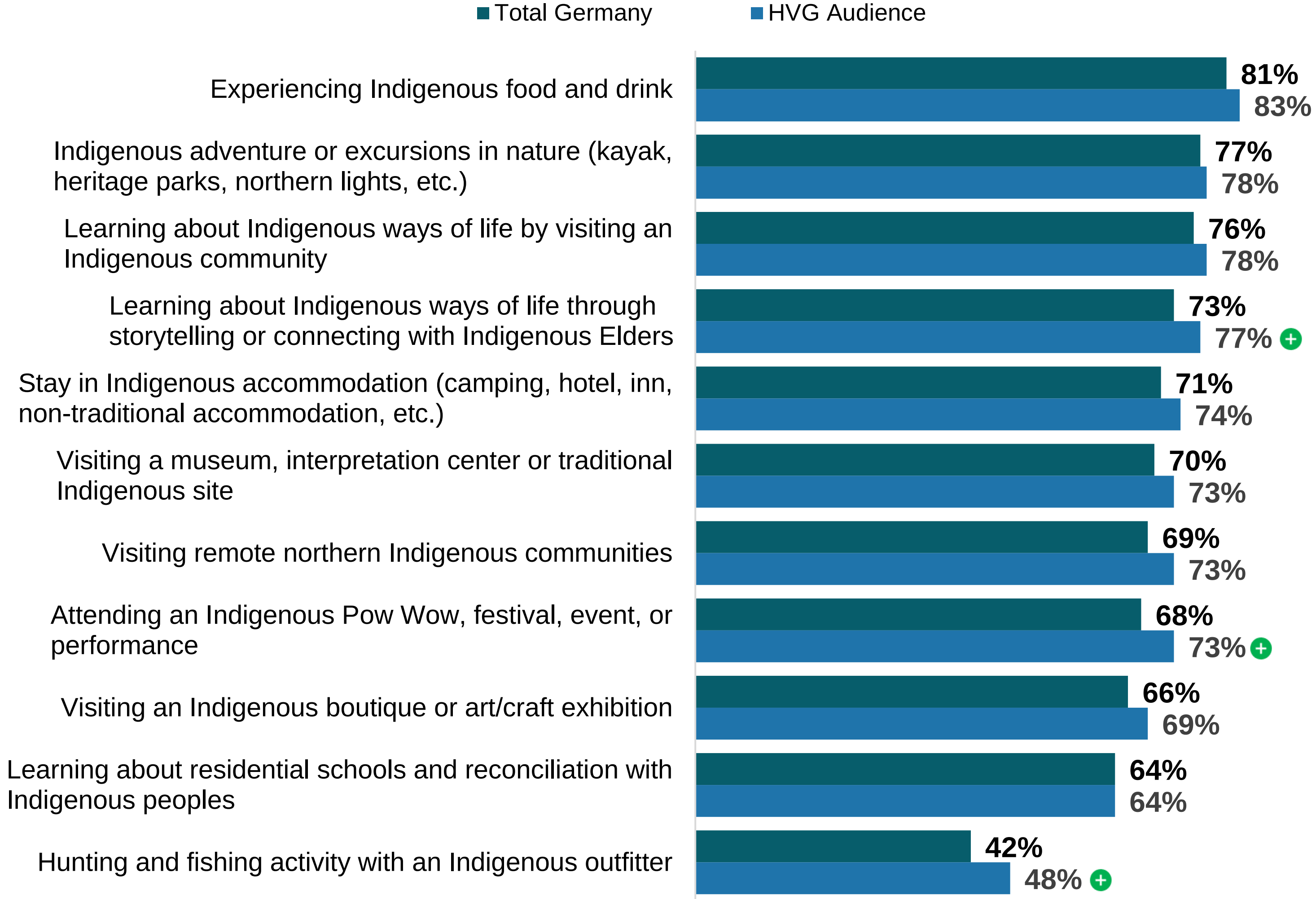
+ / − = significantly higher/lower result (vs. Total)

Interest in Indigenous Cultural & Tourism Activities

DESTINATION CANADA

Food and drink, excursions in nature, and visiting an Indigenous community are of greatest interest to German travellers to experience Indigenous culture in Canada. It is worth noting, however, that interest is relatively high for nearly all activities except hunting and fishing.

% Somewhat/Very interested



Indigenous Tourism Description

As you may or may not know, in Canada, Indigenous tourism businesses are majority-owned or operated by Indigenous peoples (First Nations, Métis or Inuit). The social and economic benefits of Indigenous tourism businesses goes back to the business owners and/or the communities where they are based.

Base: Those in the dream to purchase stages of the path to purchase for Canada (n=992); HVG (n=311)
E12. [DESCRIPTION] What is your level of interest in the following Indigenous cultural experiences and tourism activities in Canada?

/ = significantly higher/lower result (vs. Total)

THANK YOU

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

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CANADIAN TOURISM DATA collective