

CONFIDENTIAL

# 2023 GLOBAL TRAVELLER RESEARCH PROGRAM

## TOPLINE REPORT

## TOTAL GERMANY VS. HIGH VALUE GUEST AUDIENCE



CANADIAN TOURISM DATA  
**collective**

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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 12<sup>th</sup> – 18<sup>th</sup> 2023**



**Geographical Definition  
for Qualified Trips**

**Outside of: Europe,  
North Africa and the  
Mediterranean**



**Sample Distribution**

Sample distribution:	<b>National</b>
High Value Guest (HVG) Audience:	<b>456</b>
Other travellers:	<b>1062</b>
Total sample size:	<b>1518</b>

- 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.





# Market Sizing



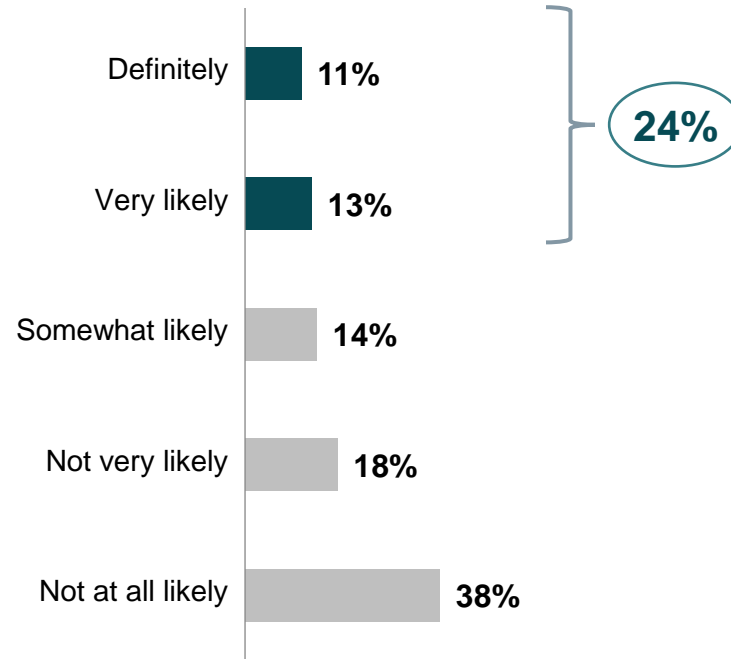
Yellowknife  
Northwest Territories



# Incidence of Long-Haul Pleasure Travel (General Population)



## Plan to Take Long-Haul Pleasure Trip in Next 2 Years



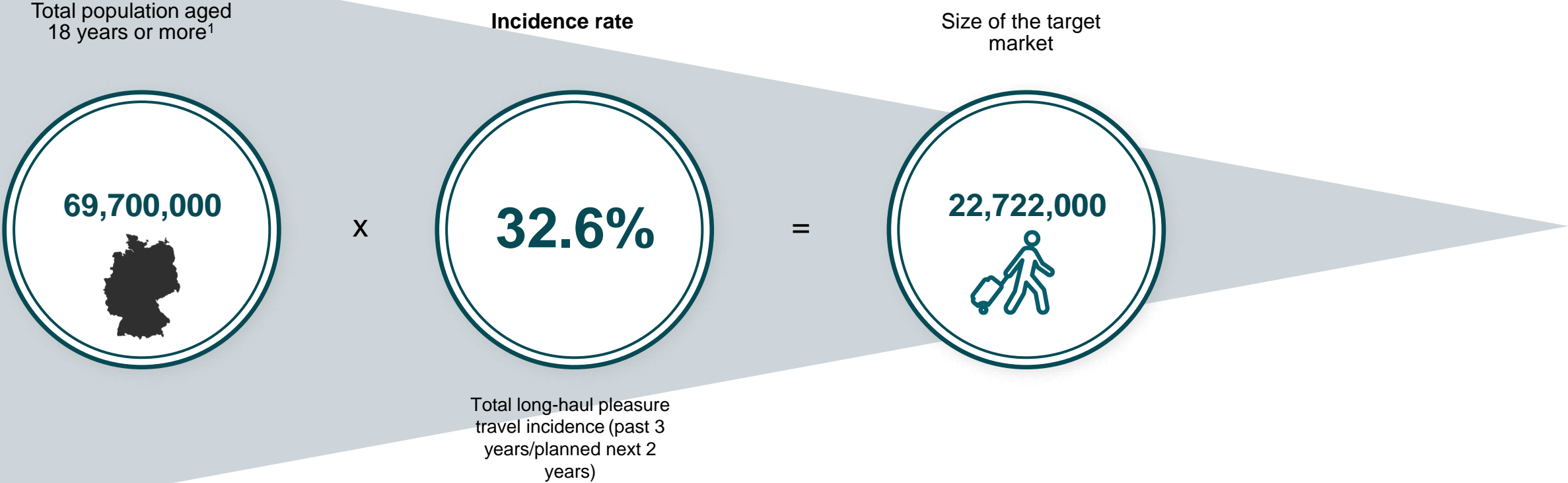
## Incidence Rate



Total long-haul pleasure travel incidence (past 3 years/planned next 2 years)

5 <sup>^</sup> Long-haul = outside of Europe, North Africa and the Mediterranean  
Note: Results are from 2023 YouGov Canada Omnibus Survey  
Base: General population aged 18+ (n=2122)

# Long-Haul Pleasure Traveller Sizing

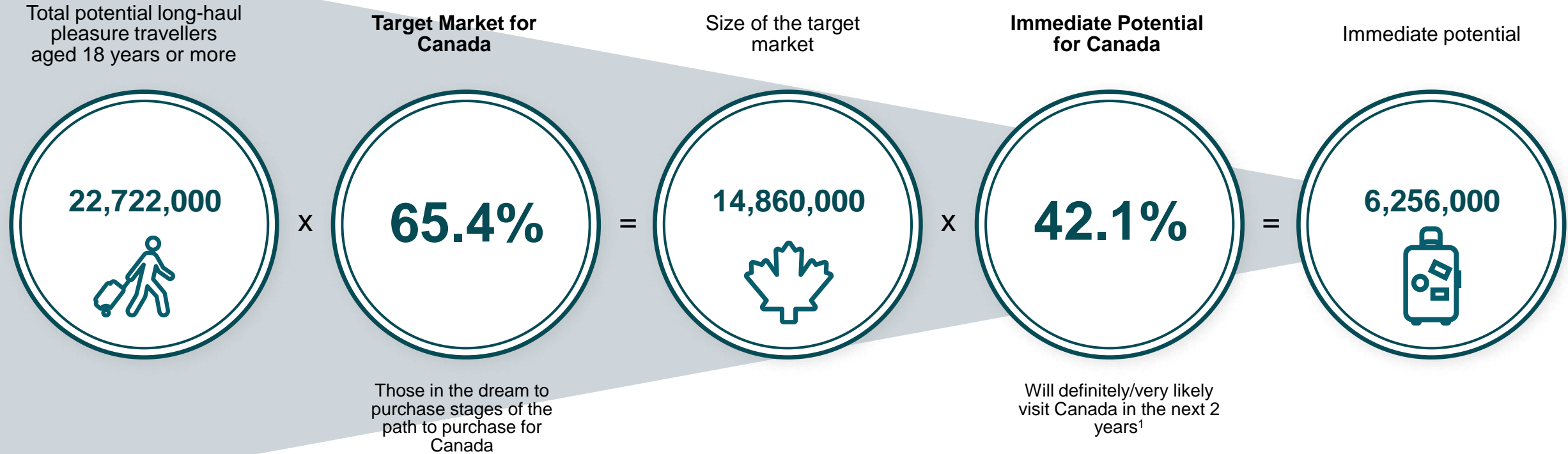


6 <sup>1</sup>Source: 2023 estimates, Federal Statistical Office of Germany  
Note: Results are from 2023 YouGov Canada Omnibus Survey  
Base: General population aged 18+ (n=2122)



# Potential Market Size For Canada

## Size of the Potential Market to Canada (Next 2 Years)



<sup>1</sup> Includes respondents likely to visit Canada for a trip of 1 to 3 nights, or a trip of 4 nights or more.  
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)  
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)

# Potential Market Size For Canada

## Size of the Potential Market to Canada (Next 2 Years): *HVG Audience*

Total potential long-haul pleasure travellers aged 18 years or more

HVG

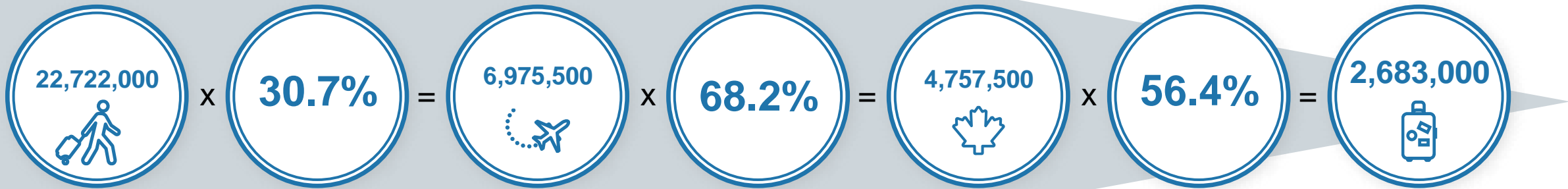
Size of HVG population

HVG Target Market for Canada

Size of the HVG target market

HVG Immediate Potential for Canada

HVG Immediate potential



Meet criteria for HVG audience definition

Those in the dream to purchase stages of the path to purchase for Canada

Will definitely/very likely visit Canada in the next 2 years<sup>1</sup>

<sup>1</sup> Includes respondents likely to visit Canada for a trip of 1 to 3 nights, or a trip of 4 nights or more.  
 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)  
 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)



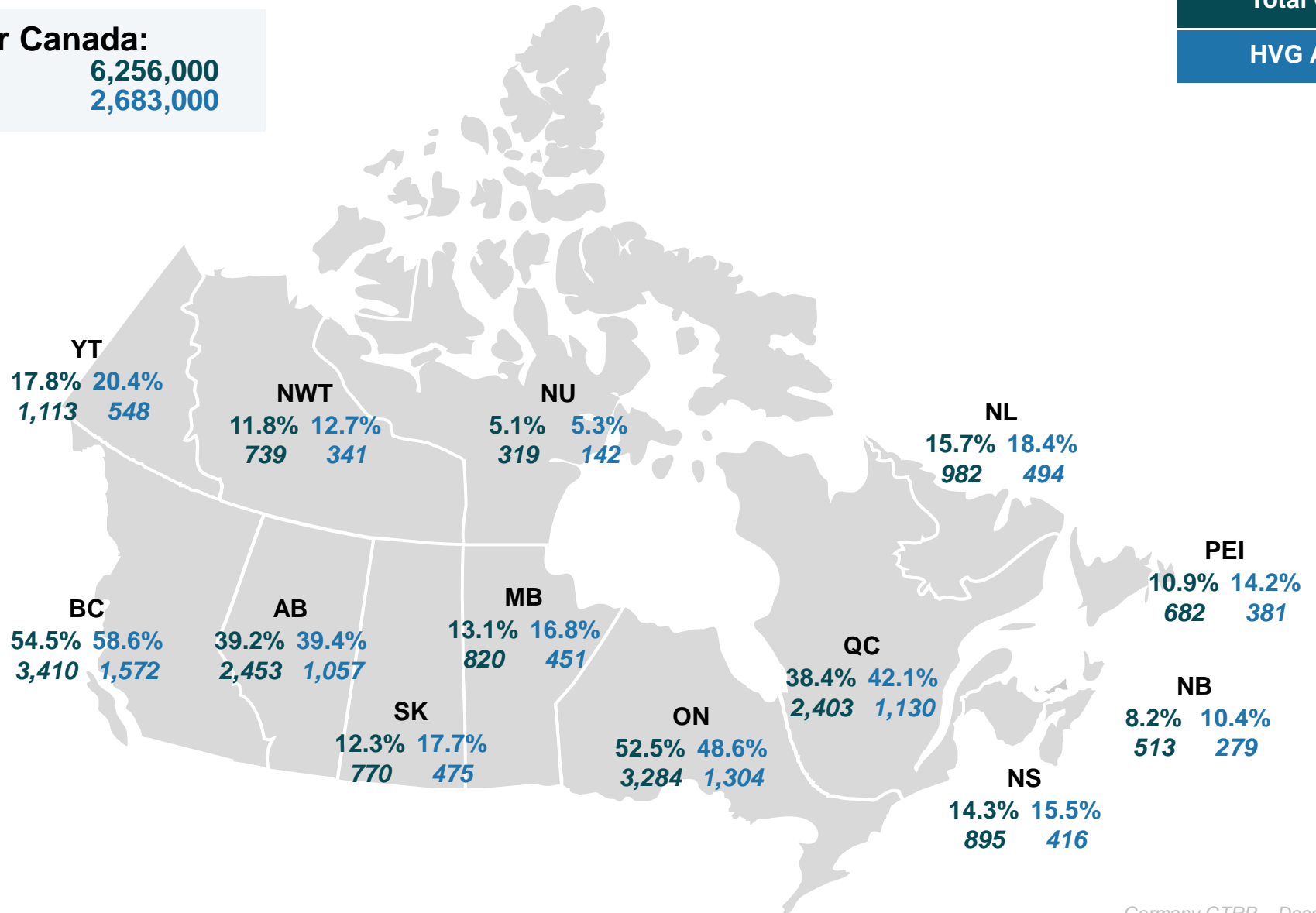


# Potential Market Size for the Regions

**Immediate Potential for Canada:**  
**Total Germany:** 6,256,000  
**HVG Audience:** 2,683,000

**Total Germany**  
**HVG Audience**

**Key:**  
 % likely to visit region  
 Immediate potential (000s)





# Key Performance Indicators



Prince Albert National Park  
Saskatchewan



# Key Performance Indicators

Indicator	Definition	All Long-haul Travellers (n=1518)	HVG Audience (n=456)
<b>Unaided destination consideration</b>	% who mentioned Canada or a destination in Canada on their consideration list <sup>1</sup>	<b>9%</b>	<b>14%+</b>
<b>Aided destination consideration</b>	% who rate Canada 4 or 5 (I am seriously considering) out of 5	<b>47%</b>	<b>56%+</b>
<b>Aided awareness of travel opportunities in Canada</b>	% with excellent/very good knowledge of travel opportunities in Canada	<b>32%</b>	<b>45%+</b>
<b>Past visitation</b>	% who have ever visited Canada for pleasure	<b>32%</b>	<b>50%+</b>

<sup>1</sup> For trips in the next 2 years.

Base: Long-haul pleasure travellers (past 3 years or next 2 years)

B1. You mentioned that you are likely to take a long-haul holiday trip **outside of Europe, North Africa and the Mediterranean** in the next 2 years. Which destinations are you seriously considering? (Please list up to 3 destinations)

C2. You may have already mentioned this before, but would you consider visiting each of the following destinations in the next 2 years? Please use a 5-point scale where 1 means 'I am definitely not considering' and 5 means 'I am seriously considering'.

C5. How would you rate your level of knowledge of holiday opportunities in each of the following destinations? (Select one for each)

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?

# Key Performance Indicators: Seasonal & Indigenous



Indicator	Definition	All Long-haul Travellers	HVG Audience
Unaided <u>fall</u> destination	% who mentioned Canada or a destination in Canada <sup>1</sup>	10%	16% +
Aided destination consideration for <u>fall</u>	% consider Canada for the months of September, October and/or November <sup>2</sup>	51%	57% +
Unaided <u>winter</u> destination	% who mentioned Canada or a destination in Canada <sup>1</sup>	9%	10%
Aided destination consideration for <u>winter</u>	% consider Canada for the months of December, January and/or February <sup>2</sup>	23%	29% +
Unaided <u>Indigenous Tourism</u> destination	% who mentioned Canada or a destination in Canada	7%	6%

<sup>1</sup>Among respondents who answered about winter/fall travel

<sup>2</sup>Among those in the dream to purchase stages of the path to purchase to Canada

Base: Long-haul pleasure travellers (past 3 years or next 2 years)

B2. What destinations come to mind when thinking about travel to experience the **winter** season? Total (n=731); HVG (n=218)

B3. What destinations come to mind when thinking about travel to experience the **autumn** season? Total (n=787); HVG (n=238)

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)

B4. What destinations come to mind when thinking about **Indigenous tourism**? Total (n=1518); HVG (n=456)







# Market Outlook



St. John's

Newfoundland and Labrador



# Market Outlook

Indicator	Definition	All Long-haul Travellers (n=1518)	HVG Audience (n=456)
<b>Incidence of long-haul pleasure travel</b>	% who have taken a long-haul pleasure trip in the past 3 years	<b>79%</b>	<b>100%+</b>
<b>Long-haul travel intentions</b>	% who plan <sup>1</sup> to take a long-haul pleasure trip in the next 2 years	<b>75%</b>	<b>100%+</b>
<b>Market Outlook (Net change in long-haul travel)</b>	% who will <u>spend a little more</u> on travel outside of Europe, North Africa and the Mediterranean in the next 12 months MINUS % who will <u>spend a little less</u>	<b>-7%</b>	<b>+10%</b>

<sup>1</sup> Who are 'Definitely' or 'Very Likely' to take a long-haul trip in the next 2 years.

Base: Long-haul pleasure travellers (past 3 years or next 2 years)

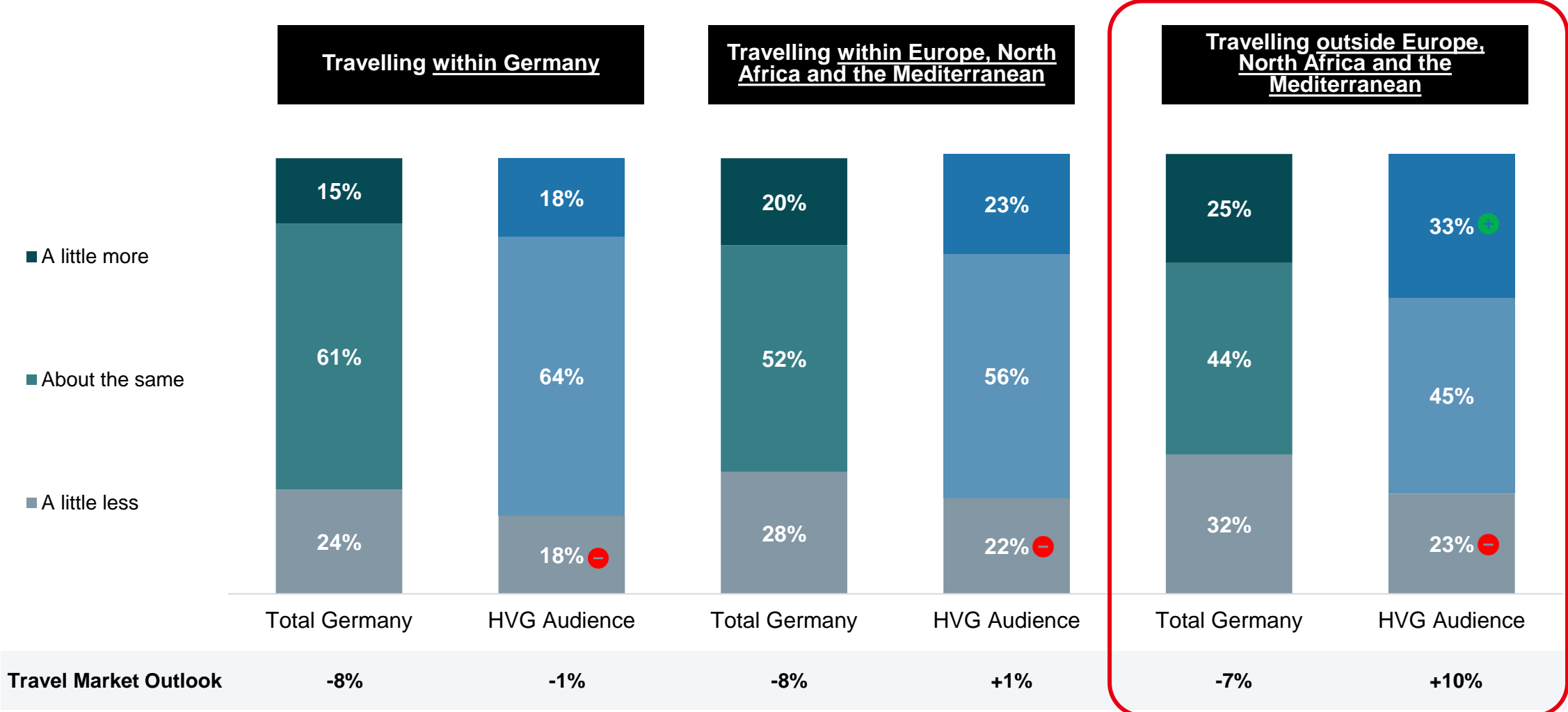
A7. In the past 3 years, have you taken a long-haul holiday trip of 4 or more nights **outside of Europe, North Africa and the Mediterranean** where you spent at least 1 night in paid accommodations? (Select one only)

A9. In the next 2 years, how likely is it that you will take a long-haul holiday trip of 4 or more nights **outside of Europe, North Africa and the Mediterranean** where you will spend at least 1 night in paid accommodations? (Select one only)

A5. How would you describe your spending intentions on the following items in the next 12 months compared to the 12 months? Will you spend...



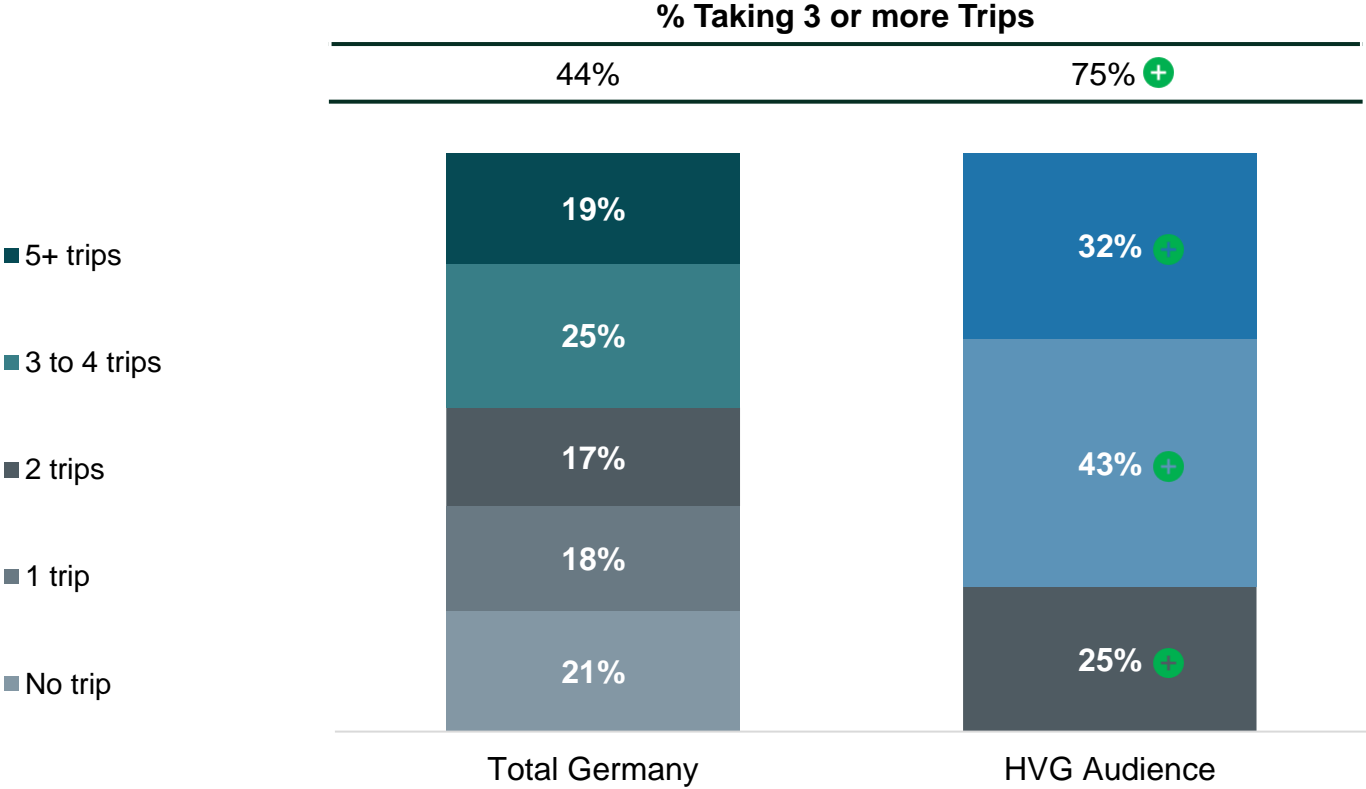
# Spending Intentions (in Next 12 Months)








# Long-Haul Travel Intensity





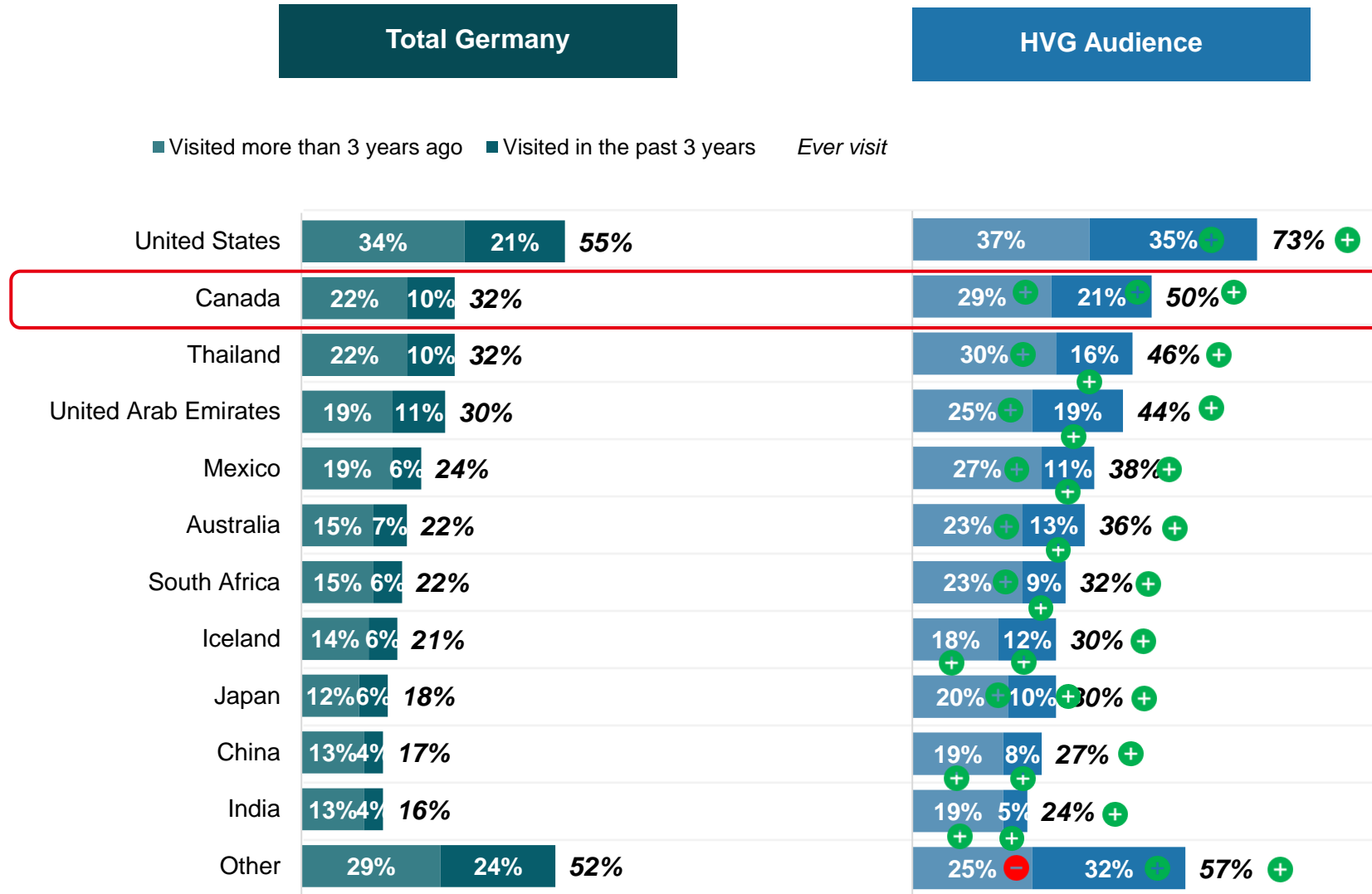
# Canada vs. Competitors



 Peggy's Cove  
Nova Scotia

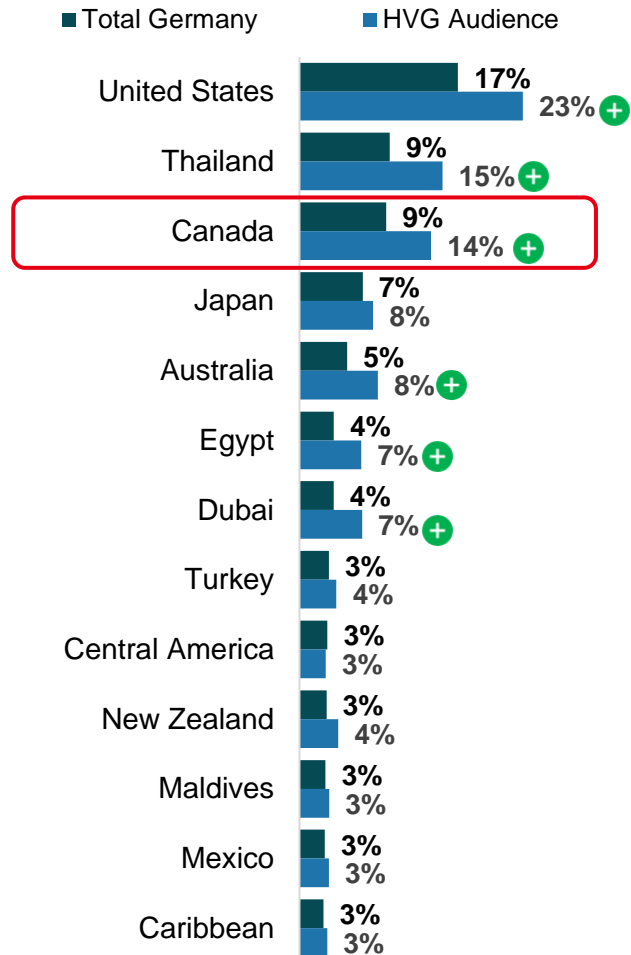


# Past Visitation

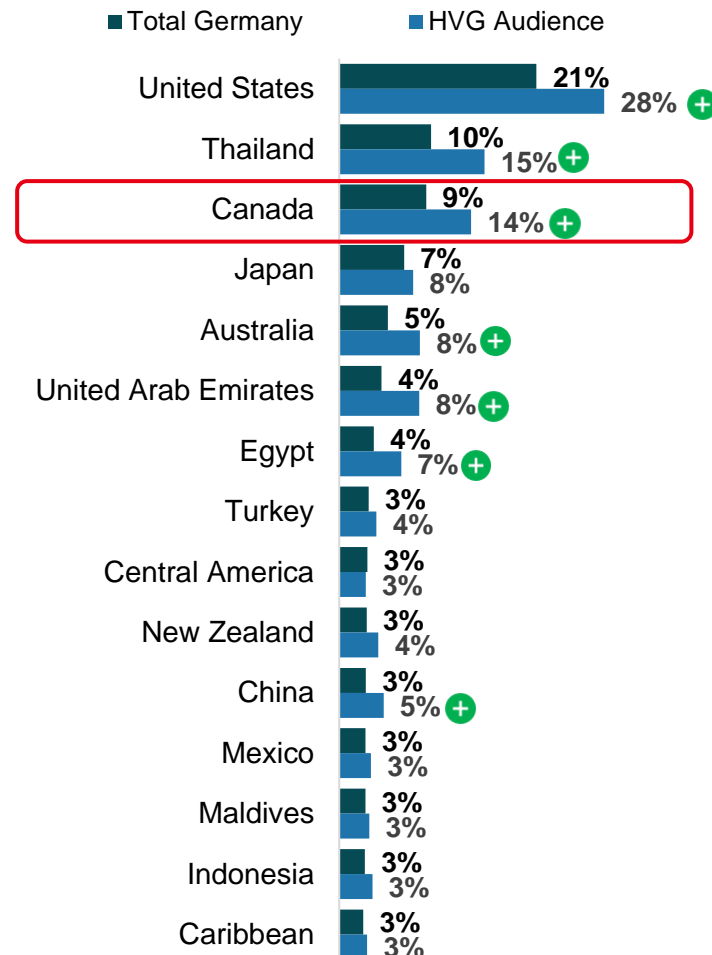


# Unaided Long-Haul Destination Consideration (Next 2 Years)

## Top Destination Brands<sup>1</sup>



## Top Destinations<sup>2</sup>



<sup>1</sup> Responses as mentioned by respondents (e.g., percentage who said "Canada" specifically).  
<sup>2</sup> 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)

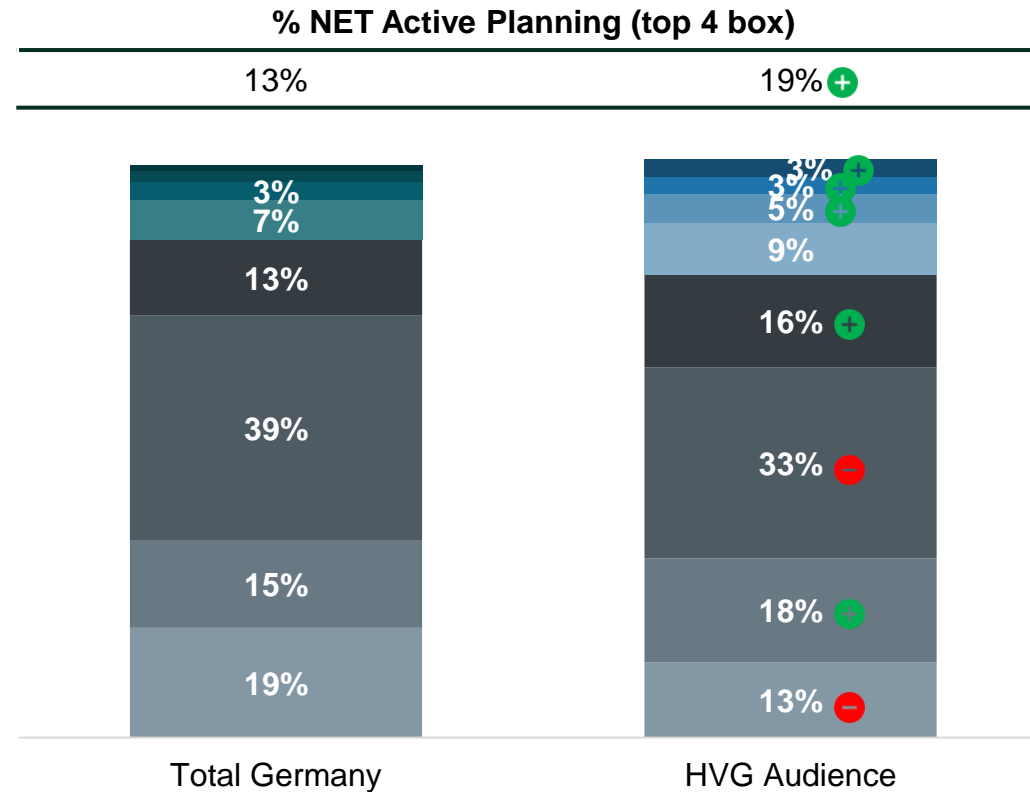




# Path to Purchase for Canada



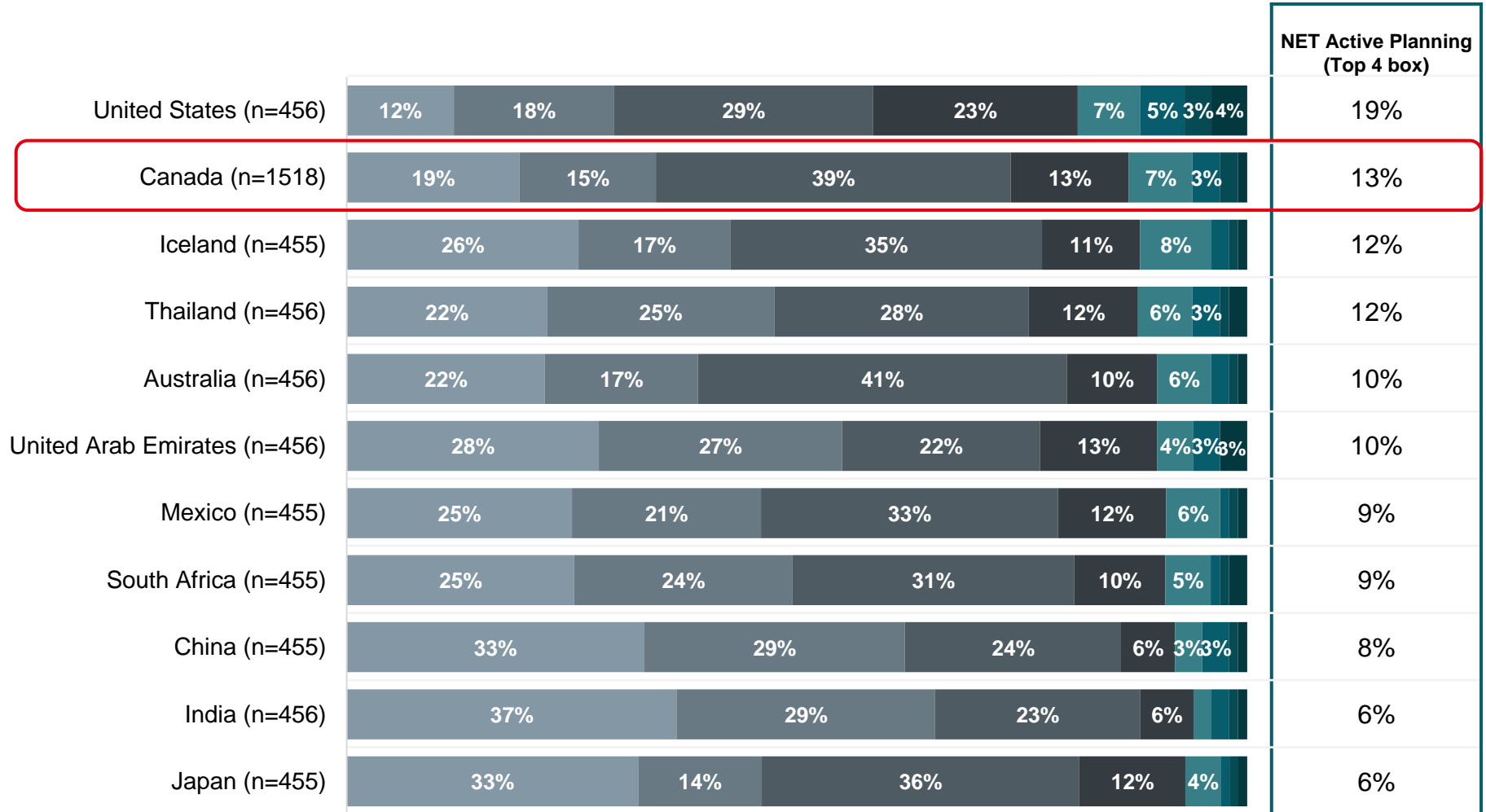
- Have already booked my transportation and accommodations
- Am currently making transportation and accommodation arrangements
- Am planning the itinerary for a trip to this country
- Have started to gather some travel information for a trip to this country
- Seriously considering visiting / returning in the next 2 years
- Dreaming about visiting / returning someday
- Not interested in visiting / returning in the foreseeable future
- Have never thought of taking a trip to this destination



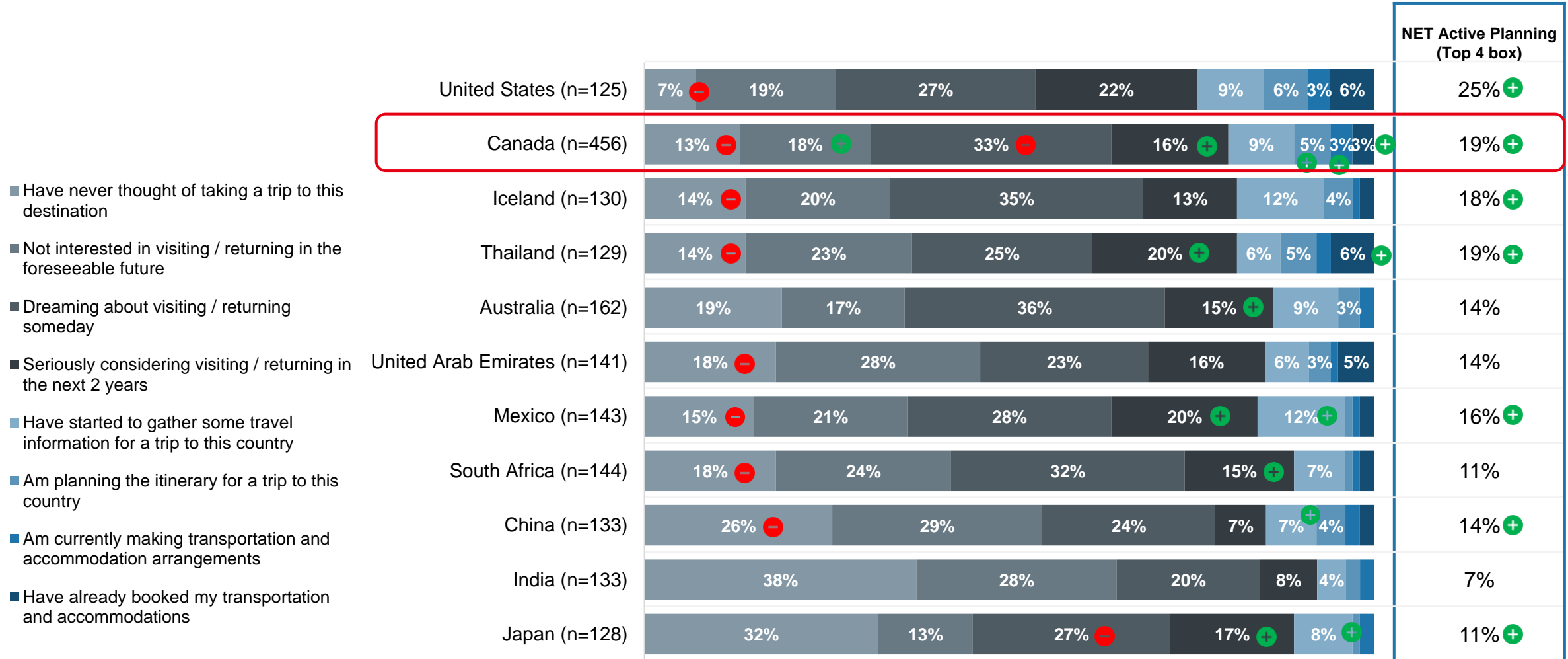
# Stage in the Purchase Cycle: Total Germany



- Have never thought of taking a trip to this destination
- Not interested in visiting / returning in the foreseeable future
- Dreaming about visiting / returning someday
- Seriously considering visiting / returning in the next 2 years
- Have started to gather some travel information for a trip to this country
- Am planning the itinerary for a trip to this country
- Am currently making transportation and accommodation arrangements
- Have already booked my transportation and accommodations



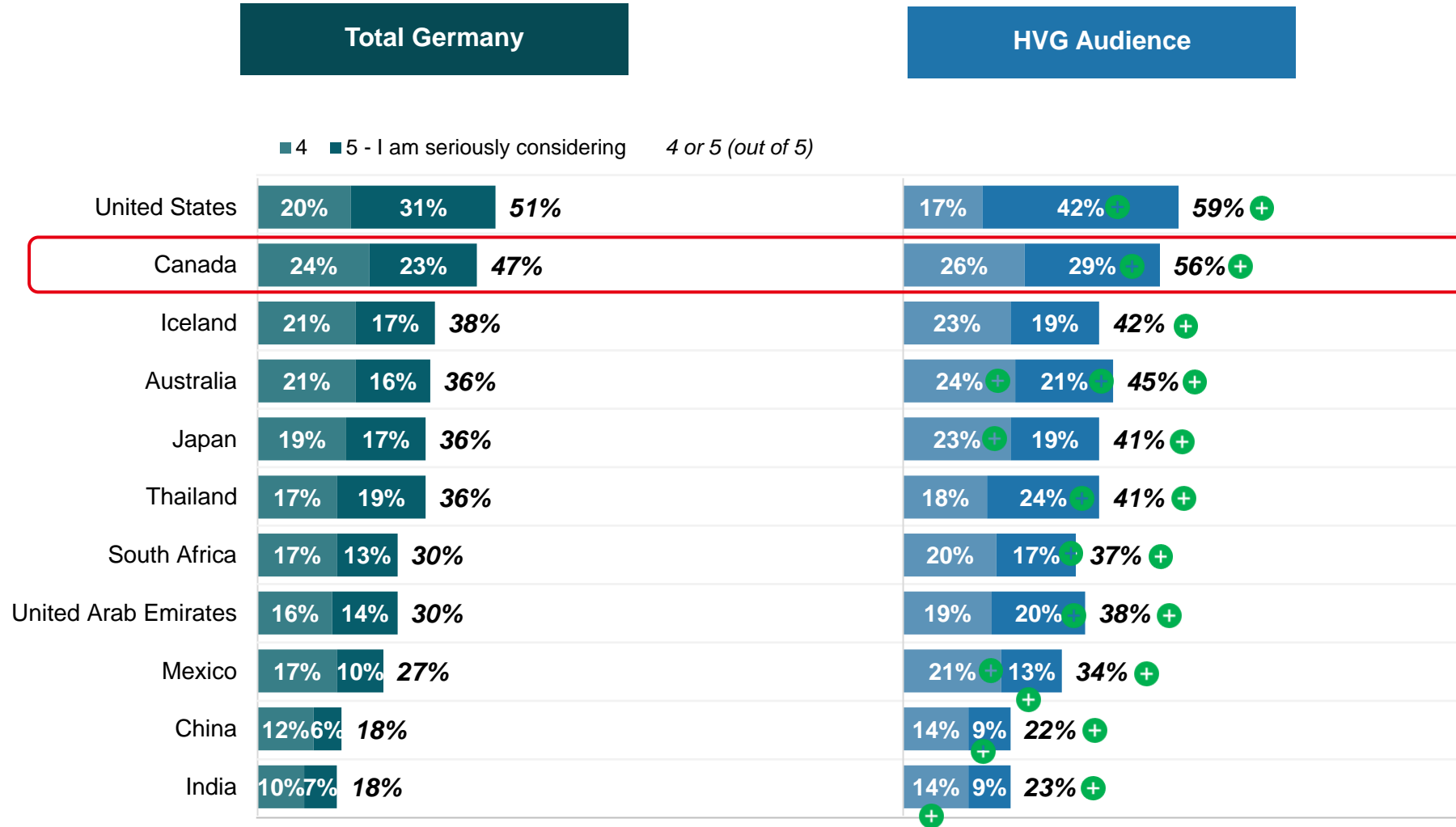
# Stage in the Purchase Cycle: Among HVG Audience



- Have never thought of taking a trip to this destination
- Not interested in visiting / returning in the foreseeable future
- Dreaming about visiting / returning someday
- Seriously considering visiting / returning in the next 2 years
- Have started to gather some travel information for a trip to this country
- Am planning the itinerary for a trip to this country
- Am currently making transportation and accommodation arrangements
- Have already booked my transportation and accommodations



# Destination Consideration (Next 2 Years)



# Destination Consideration By Seasons

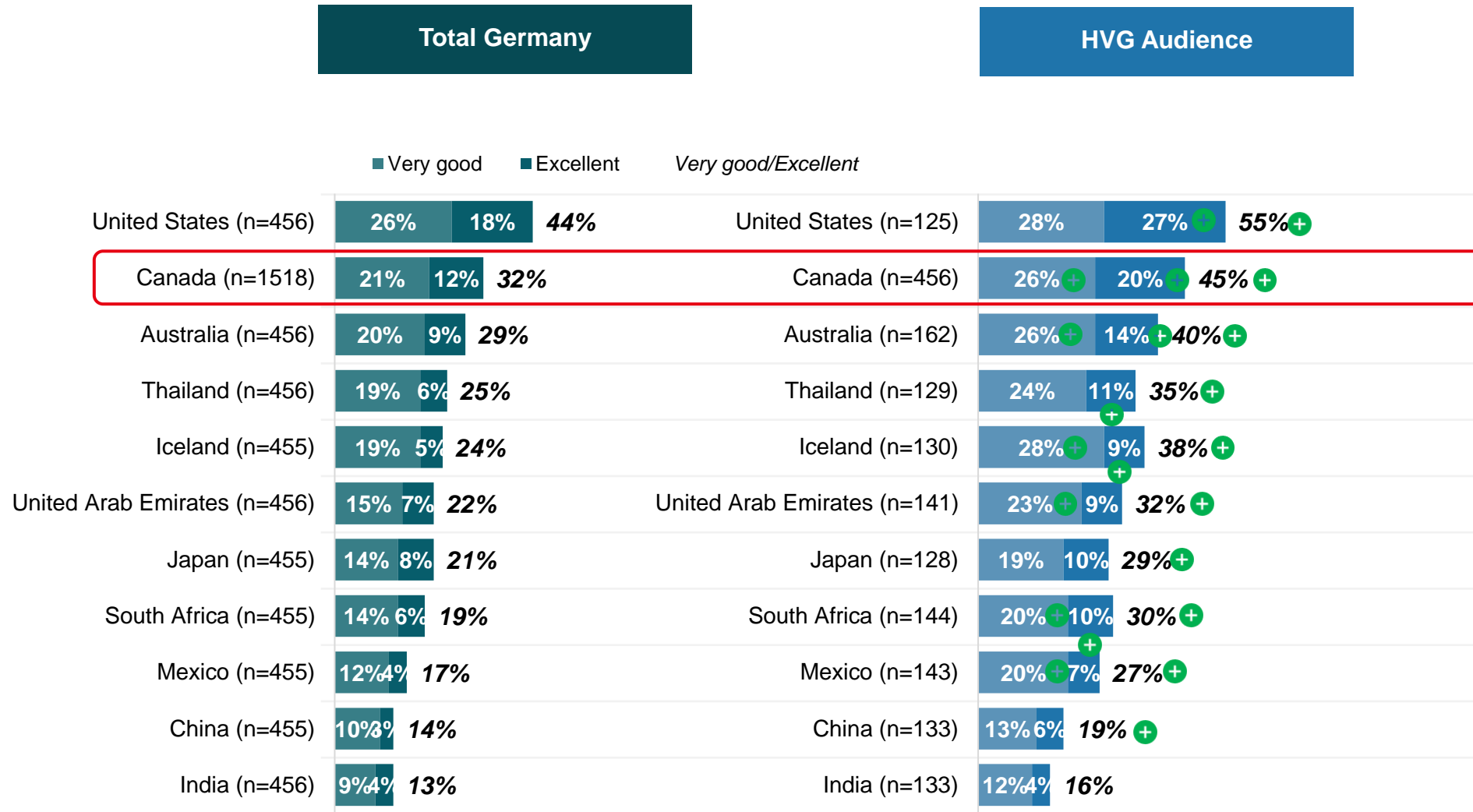
Total Germany	Winter (Dec, Jan, Feb)	Spring (Mar, Apr, May)	Summer (Jun, Jul, Aug)	Fall (Sept, Oct, Nov)
<b>Australia</b> (n=280)	43%	43%	29%	42%
<b>Canada</b> (n=992)	23%	38%	56%	51%
<b>China</b> (n=173)	21%	47%	39%	38%
<b>Iceland</b> (n=261)	25%	38%	58%	40%
<b>India</b> (n=157)	34%	44%	34%	35%
<b>Japan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

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





# Knowledge of Holiday Opportunities

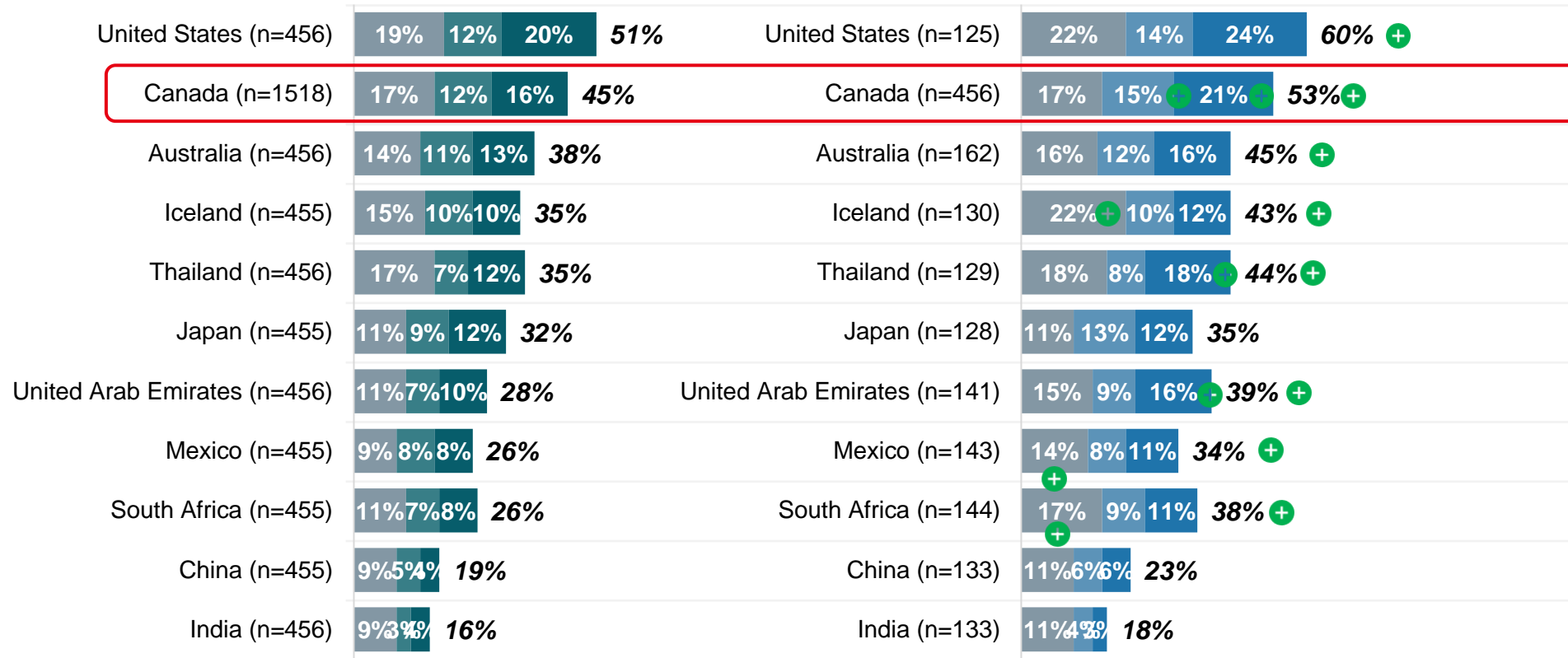


# Destination Fit

## Total Germany

## HVG Audience

8 9 10 - Exactly what I'm looking for Top 3 box

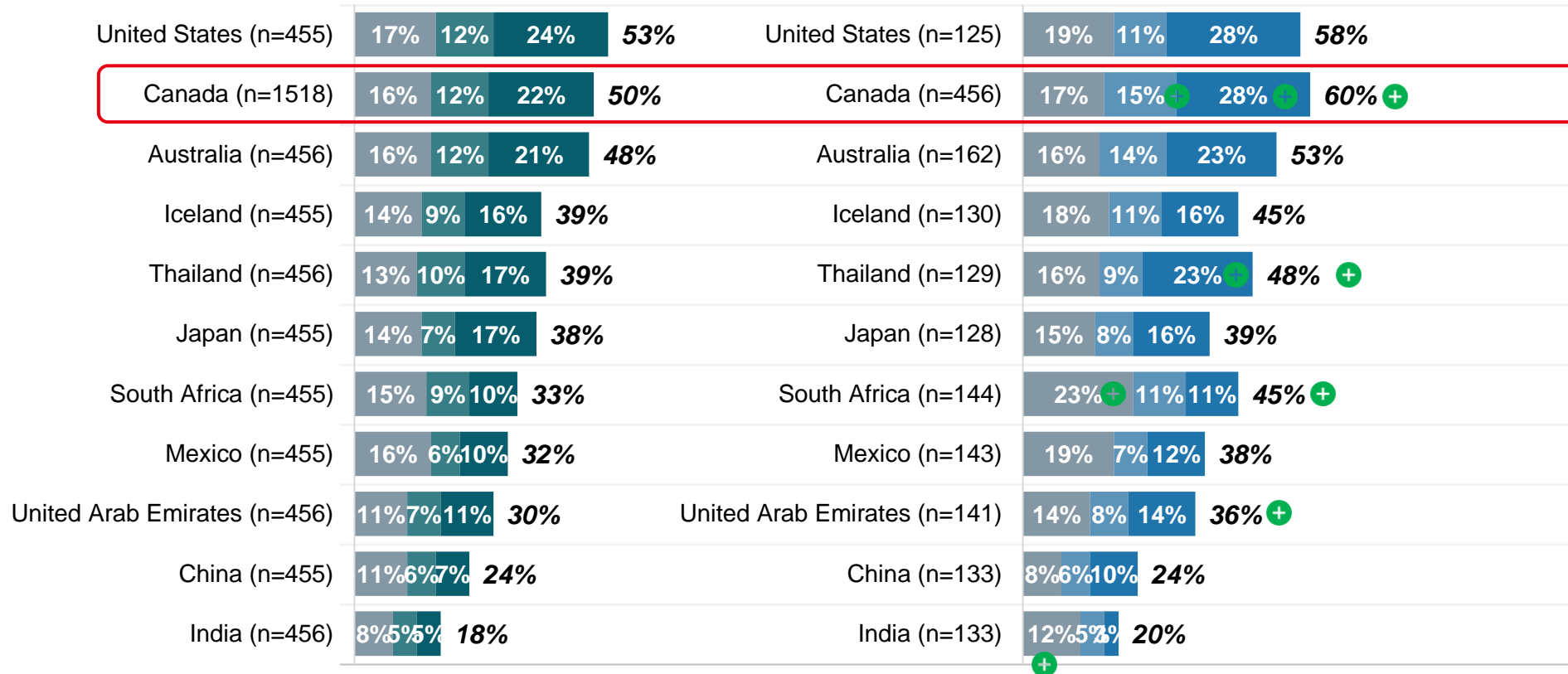


# Destination Appeal

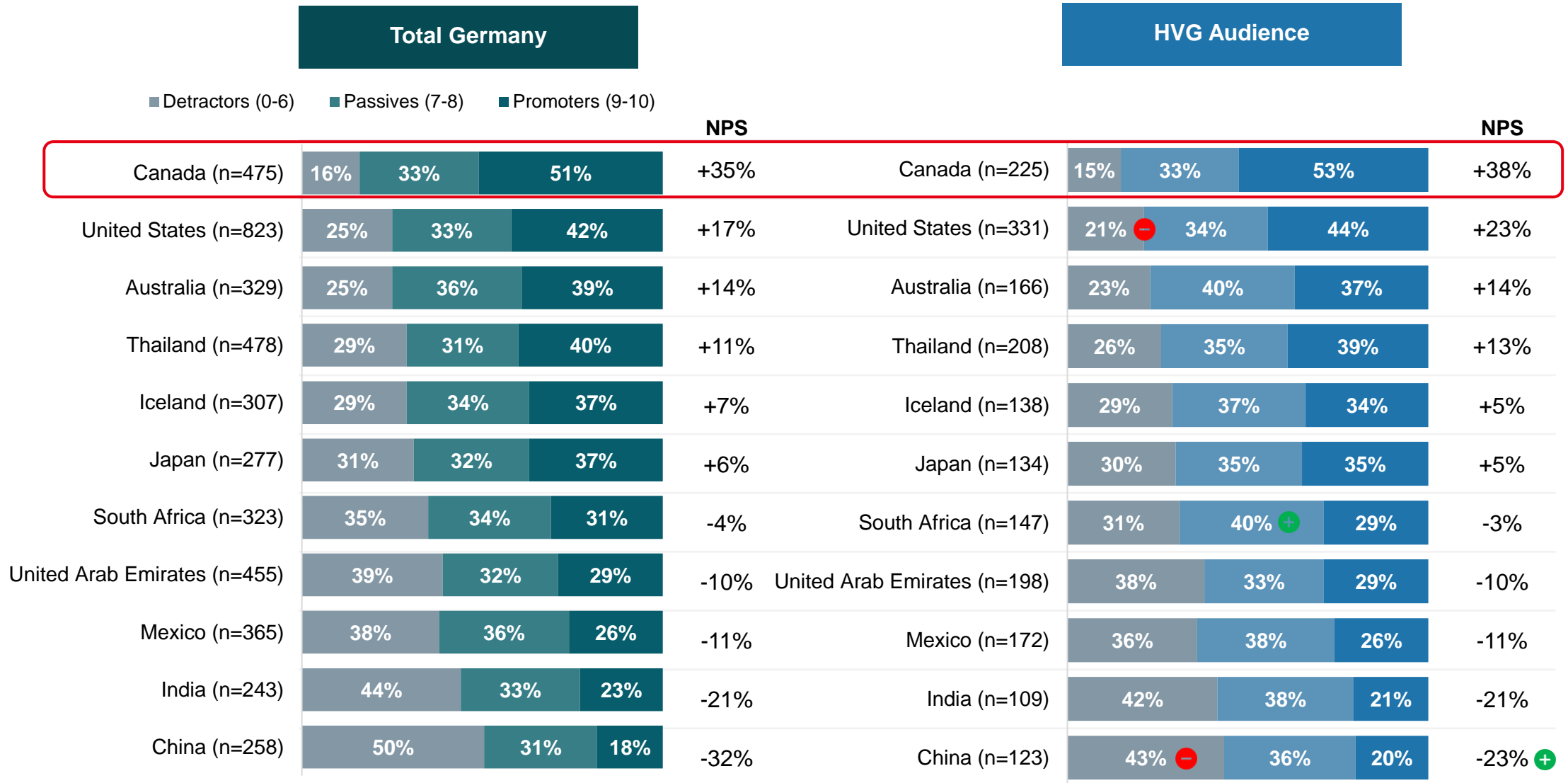
## Total Germany

## HVG Audience

8 9 10 - Agree completely Top 3 box



# Net Promoter Score (NPS)



29 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?

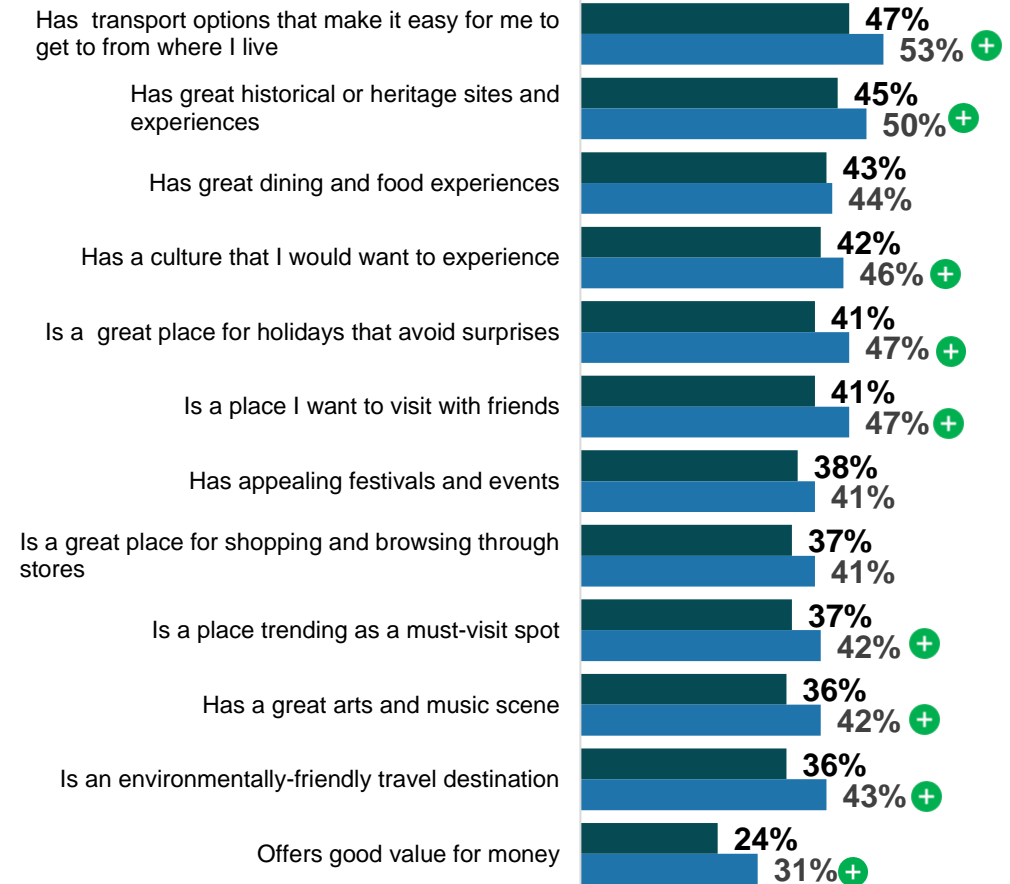
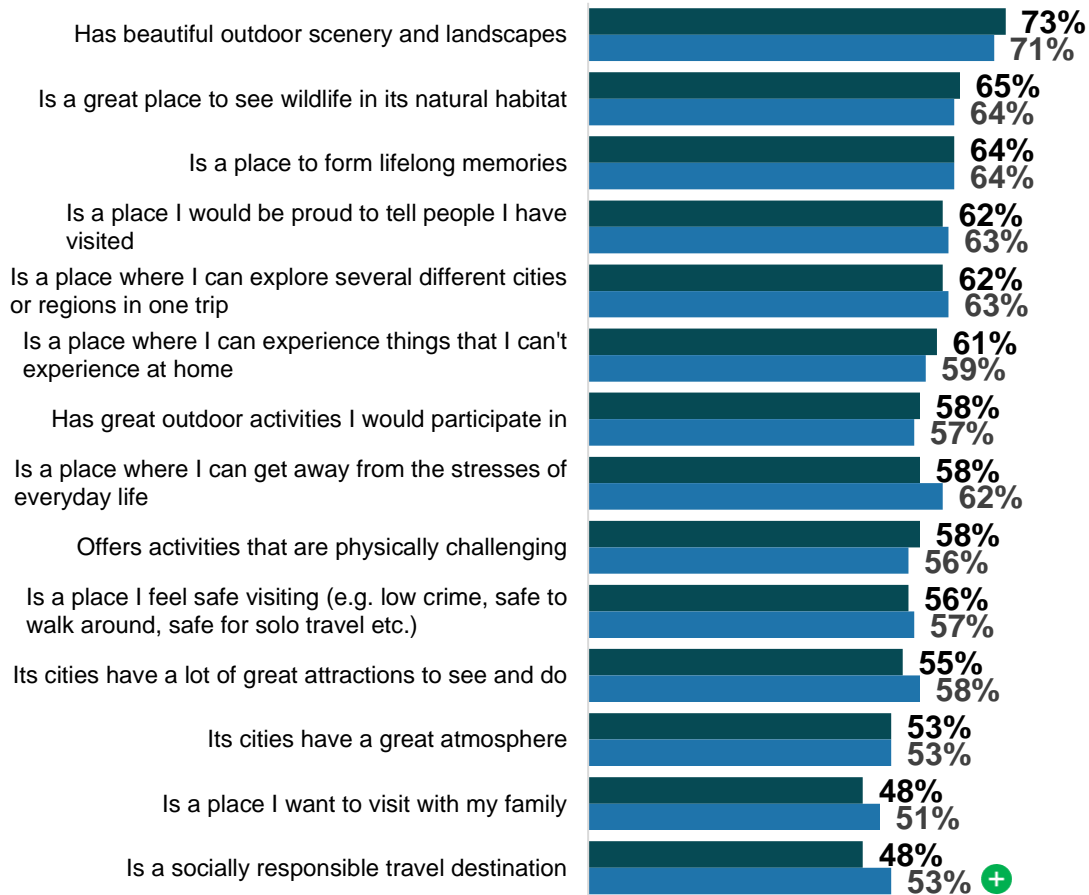
Germany GTRP – December 2023  
 + / - = significantly higher/lower result (vs. Total)



# Impressions of Canada as a Holiday Destination



■ Total Germany    ■ HVG Audience





# Destination Attributes – Relative Strengths & Weaknesses: Among Total Germany



		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											
General Needs	Is a place I would be proud to tell people I have visited											
	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
Type of Trip	Has transport options that make it easy for me to get to from where I live		Weakness								Strength	
	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
To-See	Has appealing festivals and events	Weakness			Weakness	Strength		Strength				
	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

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.



# Destination Attributes – Relative Strengths & Weaknesses : Among HVG Audience

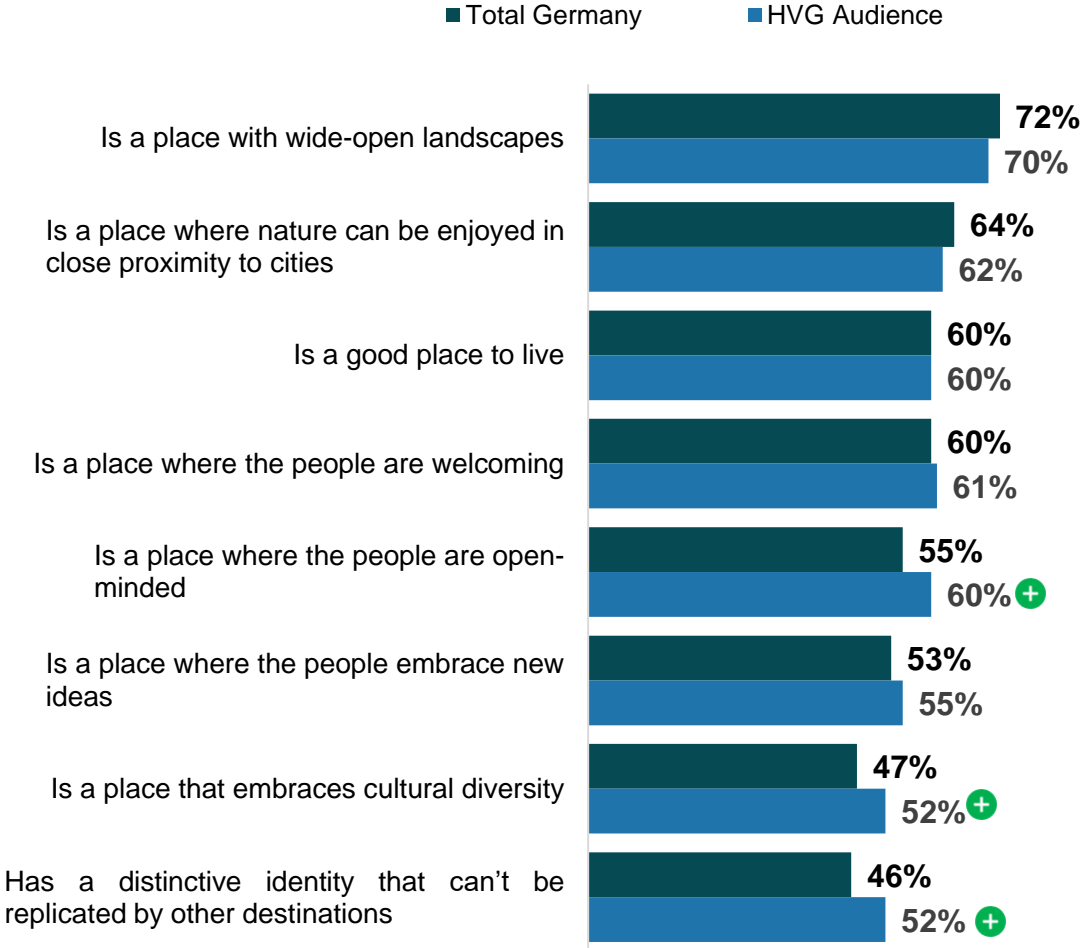


		Canada	Australia	China	Iceland	India	Japan	Mexico	South Africa	Thailand	United Arab Emirates	United States
	n=	456	162	133	130	133	128	143	144	129	141	125
Higher Order Motivations	Is a place where I can get away from the stresses of everyday life			Weakness	Strength							Weakness
	Is a place to form 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				

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 for 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) (n=1518); HVG (n=456)  
 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



	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										

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 HVG Audience



	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		Strength				Weakness		Strength	Weakness	Weakness	
Is a place where nature can be enjoyed in close proximity to cities			Weakness					Strength			
Is a place that embraces cultural diversity				Weakness	Strength						
Is a place where the people are welcoming			Weakness								Weakness
Is a place where the people are open-minded			Weakness								
Is a place where the people embrace new ideas		Strength									
Is a good place to live	Strength		Weakness		Weakness		Weakness				
Has a distinctive identity that can't be replicated by other destinations											

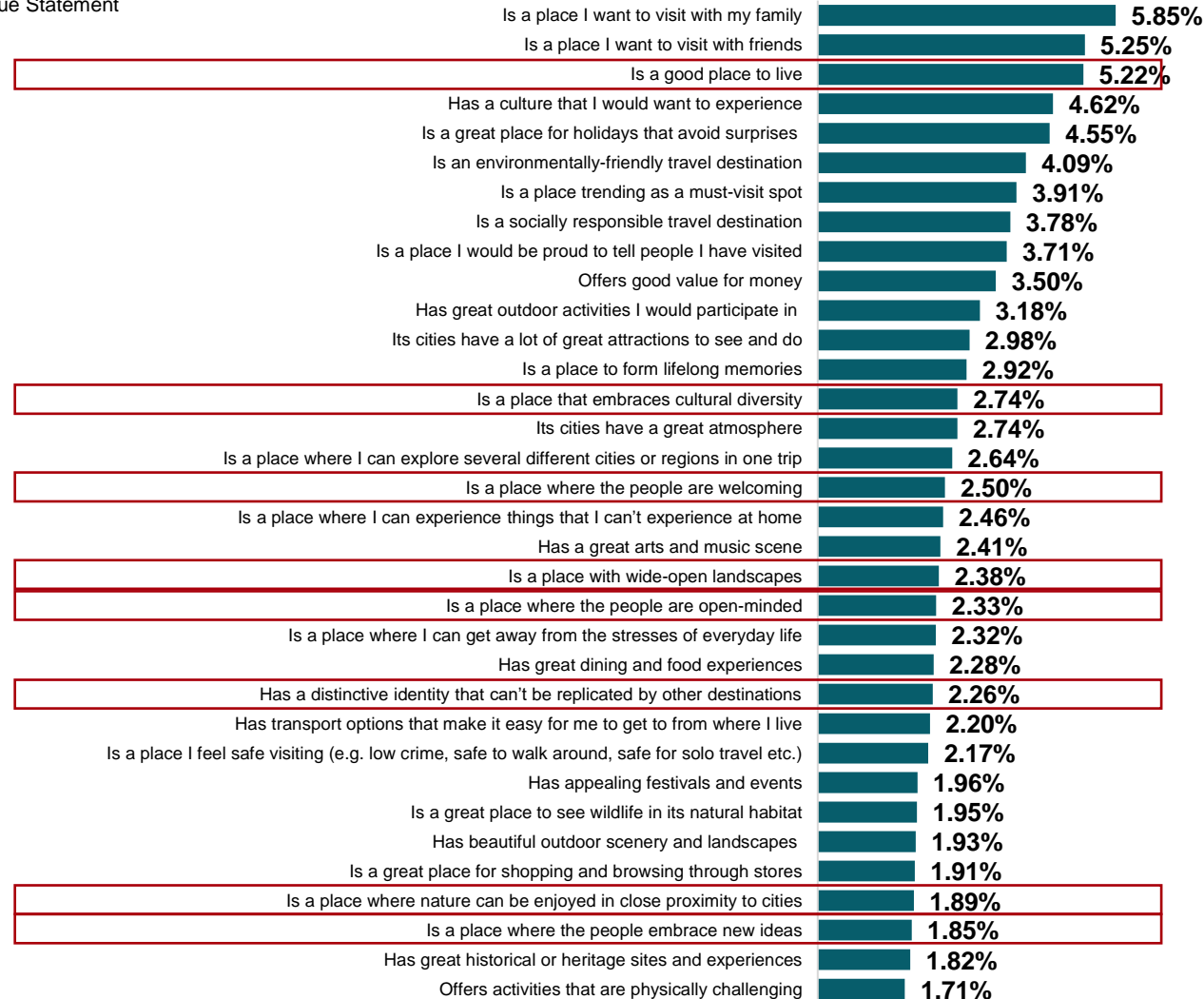




# Destination Attributes: Drivers Analysis: Among Total Germany



= Brand Value Statement



## 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

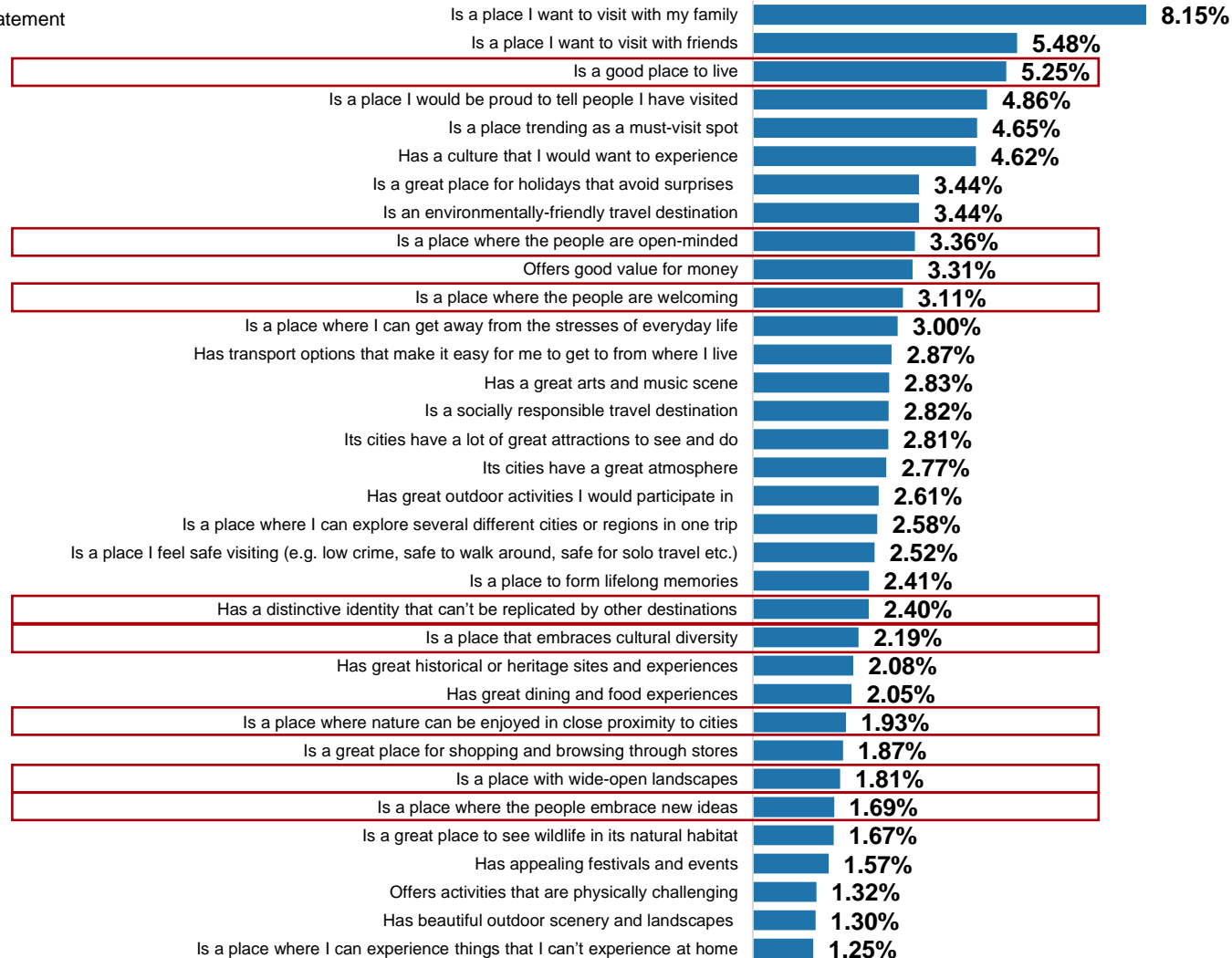
Attributes with a high percentage level are more likely to impact consideration of a destination. This generally means that destinations that score highly on the top attributes may have higher consideration levels. Each percentage does also indicate the degree of relative impact. An attribute with a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



# Destination Attributes: Drivers Analysis: Among HVG Audience



= Brand Value Statement



## 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%.





# Travel Intentions to Canada



 Toronto  
Ontario



# Likelihood to Take a Holiday Trip to Canada (Next 2 Years)



## 1-3 Night Short Trip

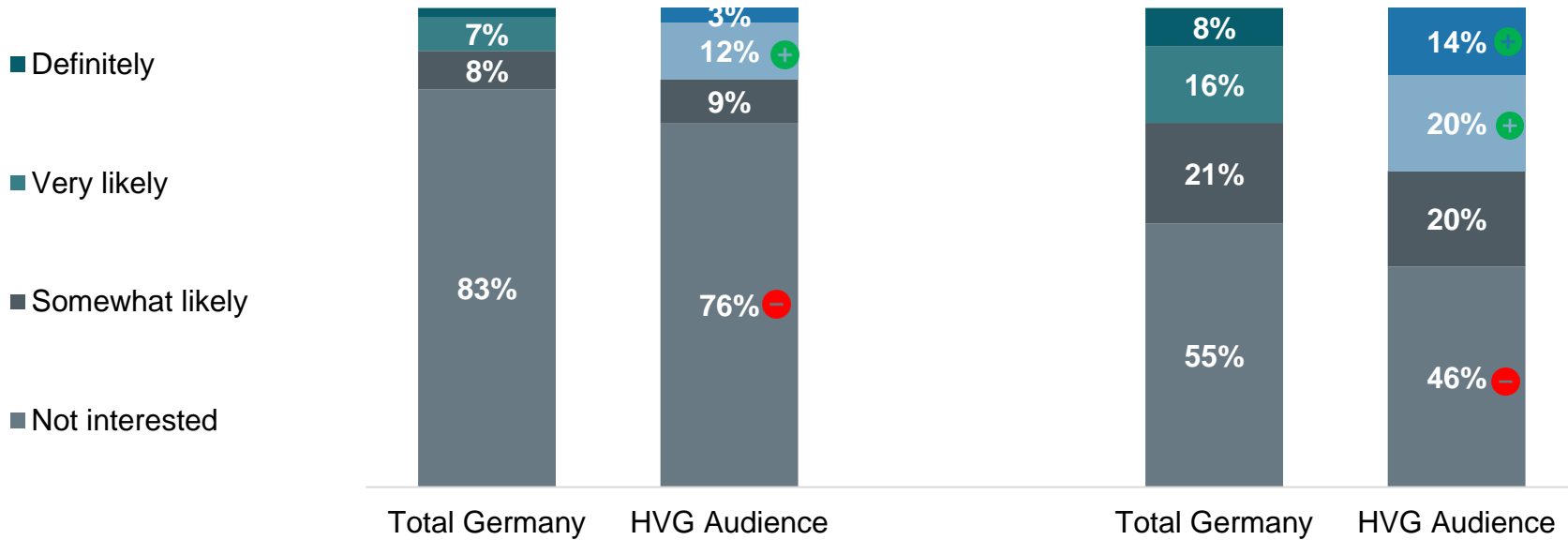
## 4+ Nights Long Trip

% Top 2 box

% Top 2 box

9%	15% +
----	-------

24%	34% +
-----	-------



**NET: Definitely/  
Very Likely to  
visit Canada in  
the next 2 years**

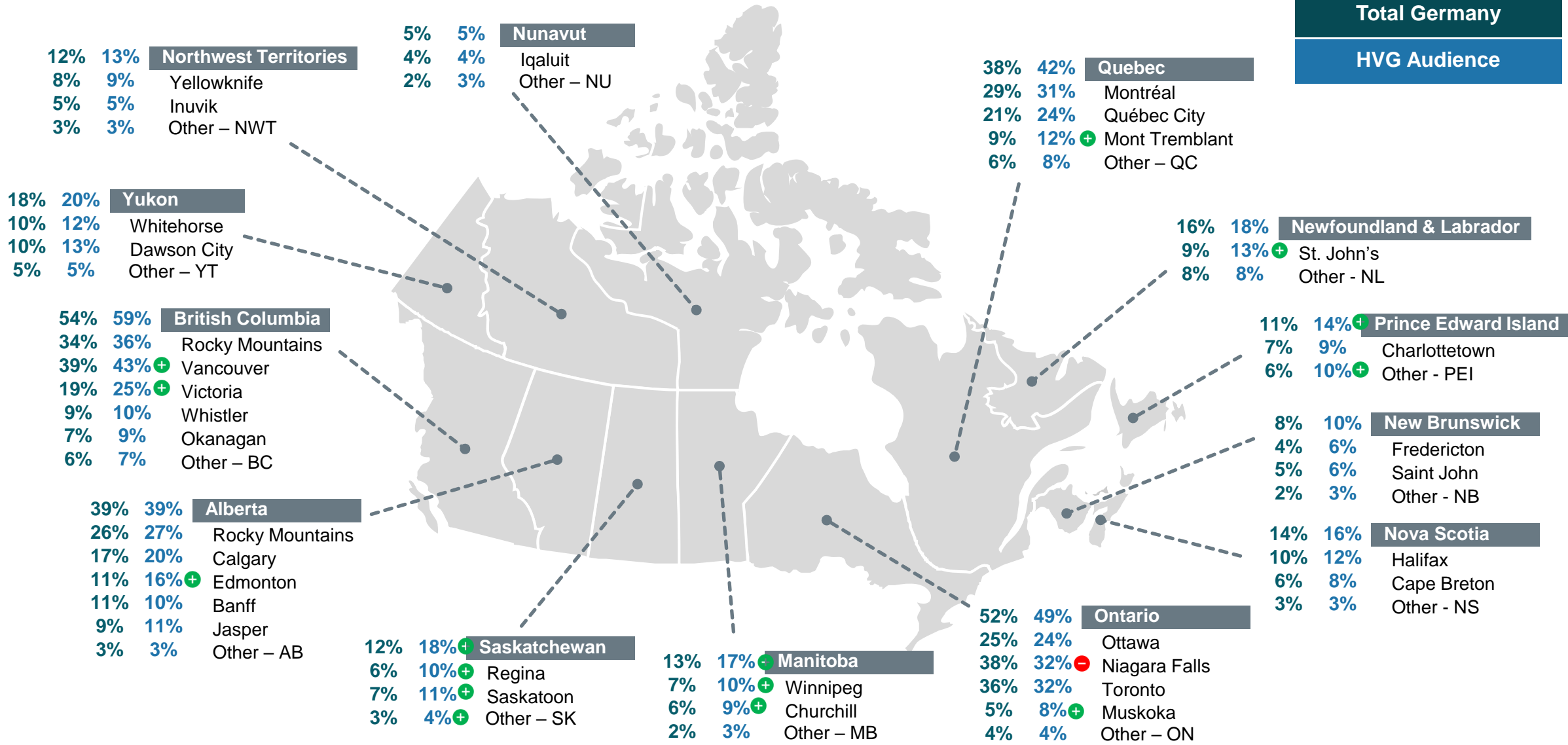
**Total: 28%**  
**HVG: 38% +**

39 Note: "Not interested" is comprised of those saying not very likely, not at all likely, or indicating no intention to visit Canada  
Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1518); HVG (n=456)  
E1. Realistically, how likely are you to take a holiday trip to Canada in the **next 2 years**? (Select one)



# Canadian Destinations Likely to Visit

**Total Germany**  
**HVG Audience**





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



Total Germany  
HVG Audience

## Northwest Territories

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

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

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

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

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

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

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

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

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

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

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

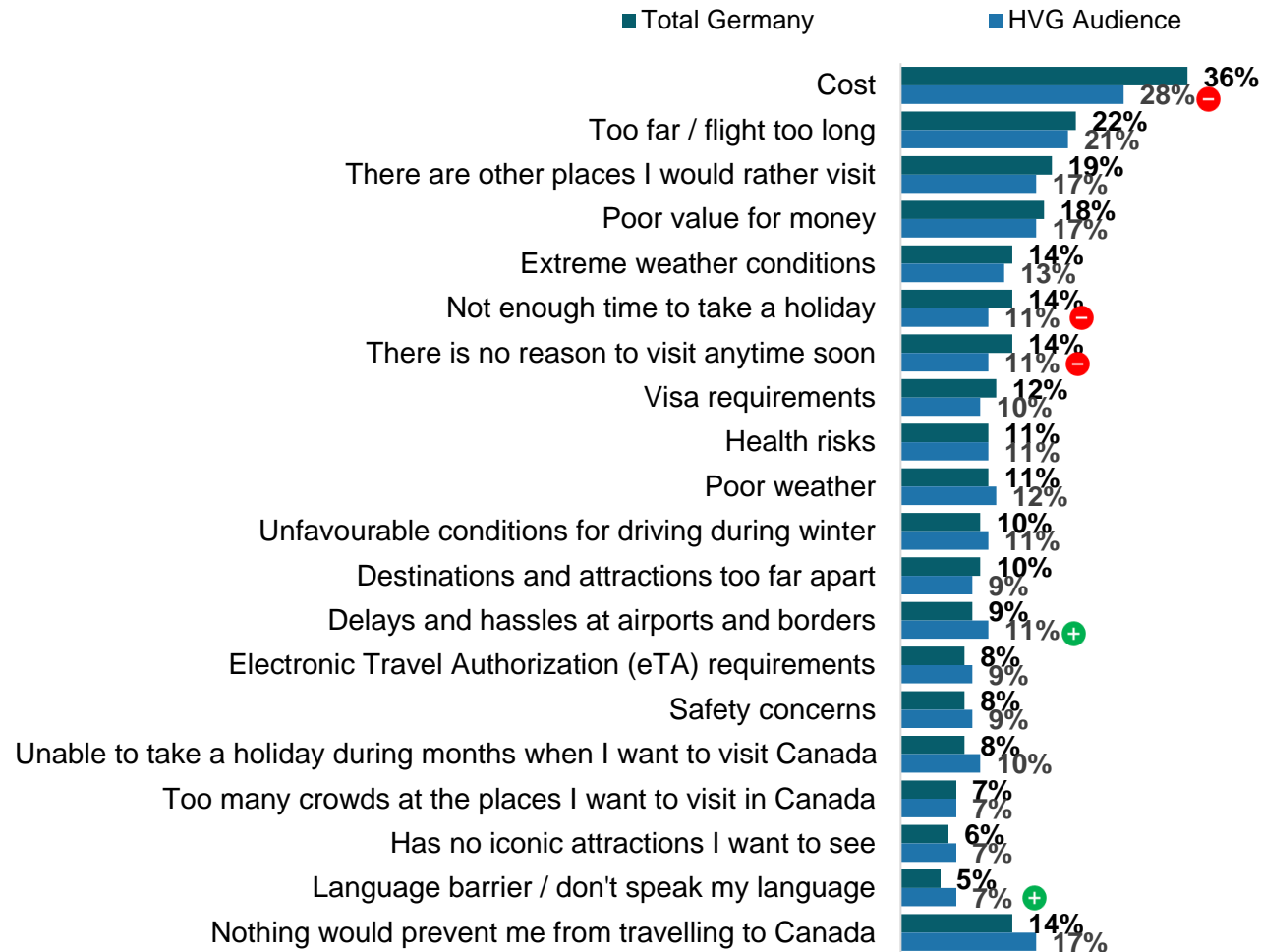
2%	3%	Winter (Dec, Jan, Feb)
5%	7%+	Spring (Mar, Apr, May)
7%	10%+	Summer (Jun, Jul, Aug)
5%	6%	Fall (Sept, Oct, Nov)

## Ontario

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



# Barriers for Visiting Canada





# Travel Behaviours



 Churchill  
Manitoba



# Top 10 Activities Interested In & Trip Anchors

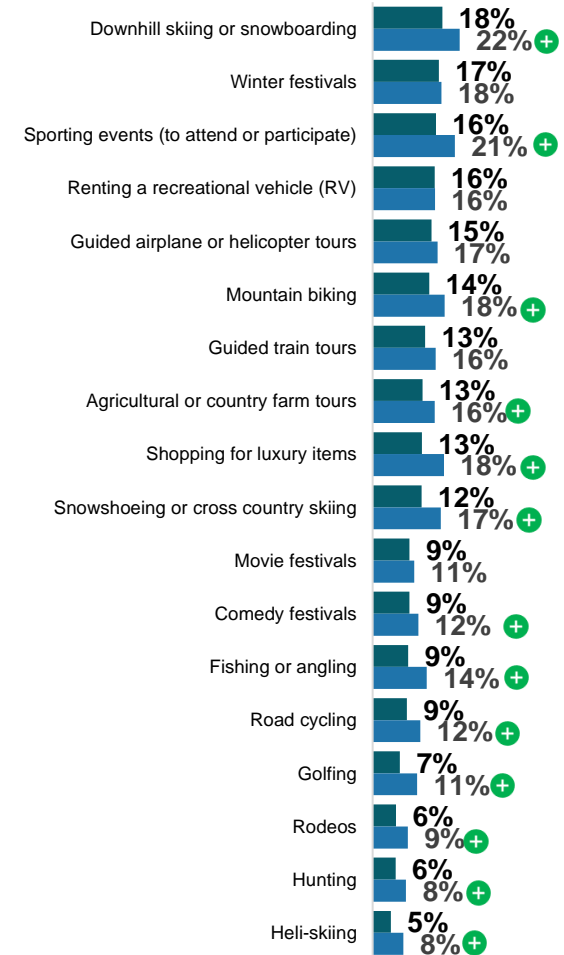
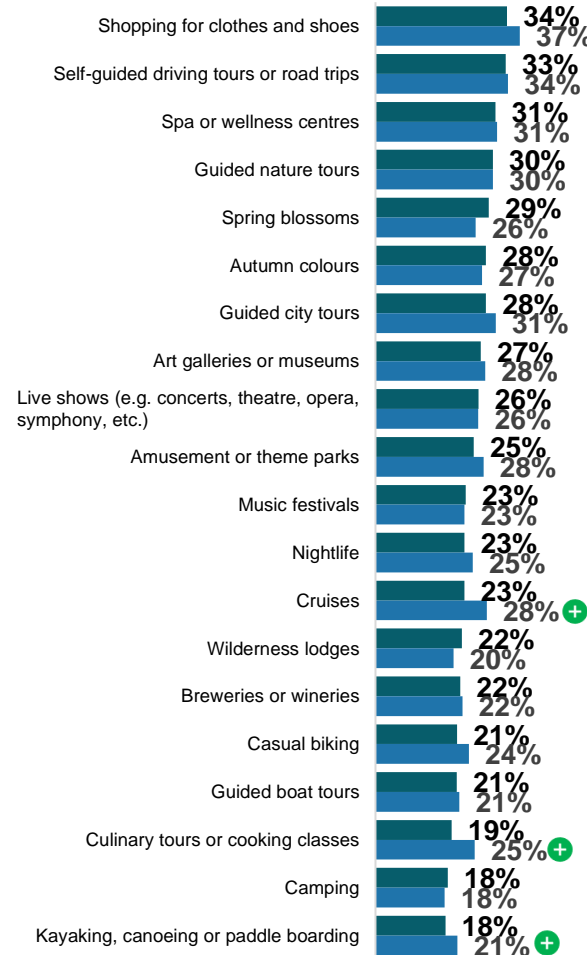
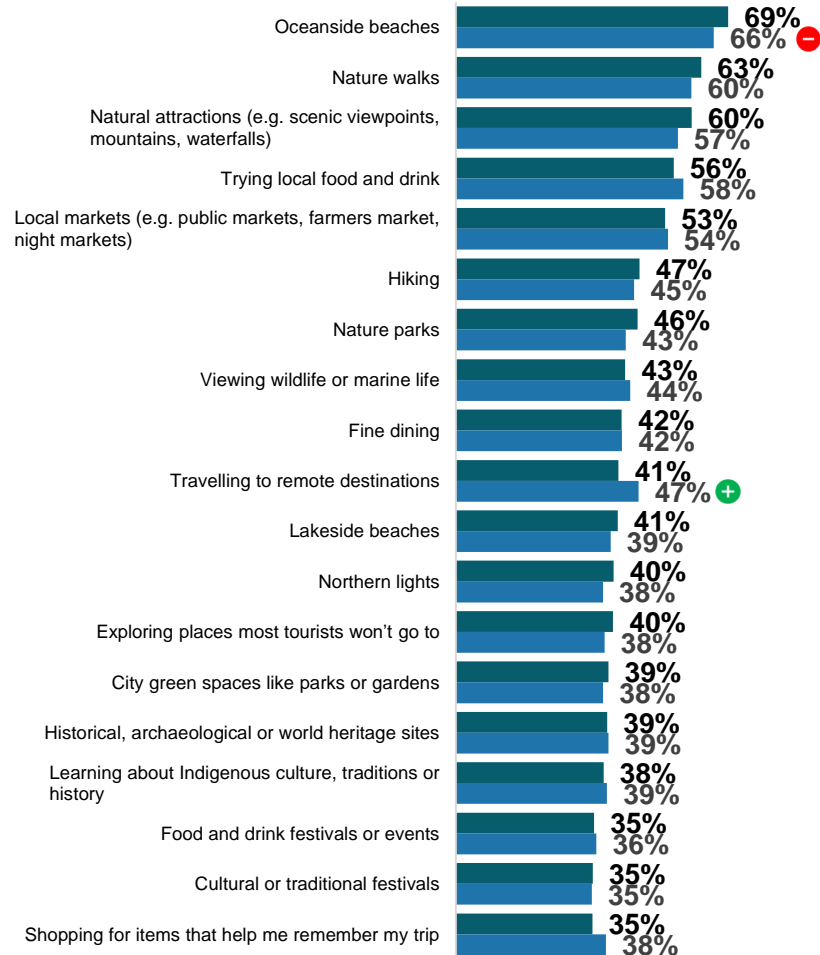
Top 10 General Activities Interested In	
Total Germany (n=1518)	HVG Audience (n=456)
Oceanside beaches	Oceanside beaches -
Nature walks	Nature walks
Natural attractions (e.g. scenic viewpoints, mountains, waterfalls)	Trying local food and drink
Trying local food and drink	Natural attractions (e.g. scenic viewpoints, mountains, waterfalls)
Local markets (e.g. public markets, farmers market, night markets)	Local markets (e.g. public markets, farmers market, night markets)
Hiking	Travelling to remote destinations +
Nature parks	Hiking
Viewing wildlife or marine life	Viewing wildlife or marine life
Fine dining	Nature parks
Travelling to remote destinations	Fine dining

Top 10 Trip Anchor Activities	
Total Germany (n=1498)	HVG Audience (n=454)
Oceanside beaches	Oceanside beaches -
Natural attractions (e.g. scenic viewpoints, mountains, waterfalls)	Natural attractions (e.g. scenic viewpoints, mountains, waterfalls)
Northern lights	Travelling to remote destinations +
Nature walks	Northern lights
Hiking	Nature parks
Travelling to remote destinations	Local markets (e.g. public markets, farmers market, night markets)
Viewing wildlife or marine life	Nature walks
Nature parks	Viewing wildlife or marine life
Trying local food and drink	Trying local food and drink
Historical, archaeological or world heritage sites	Hiking



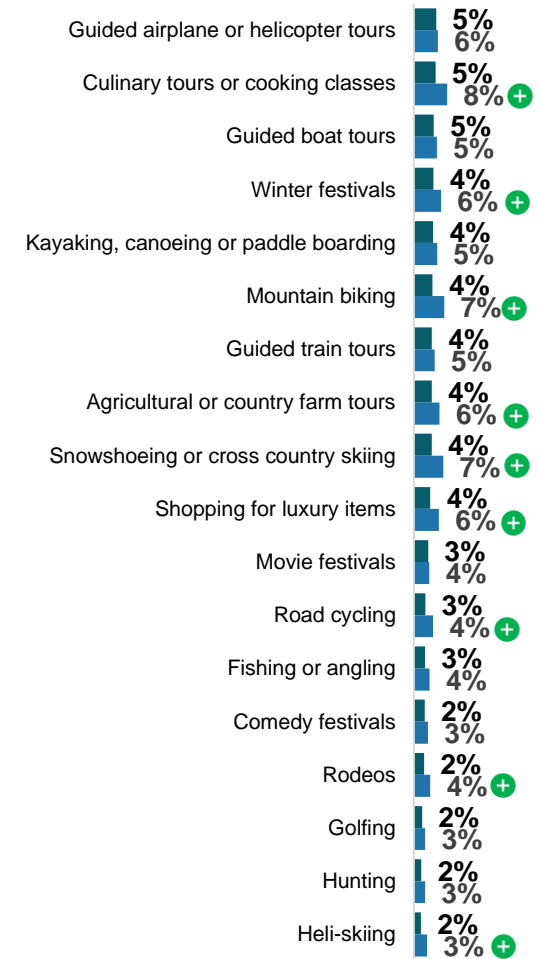
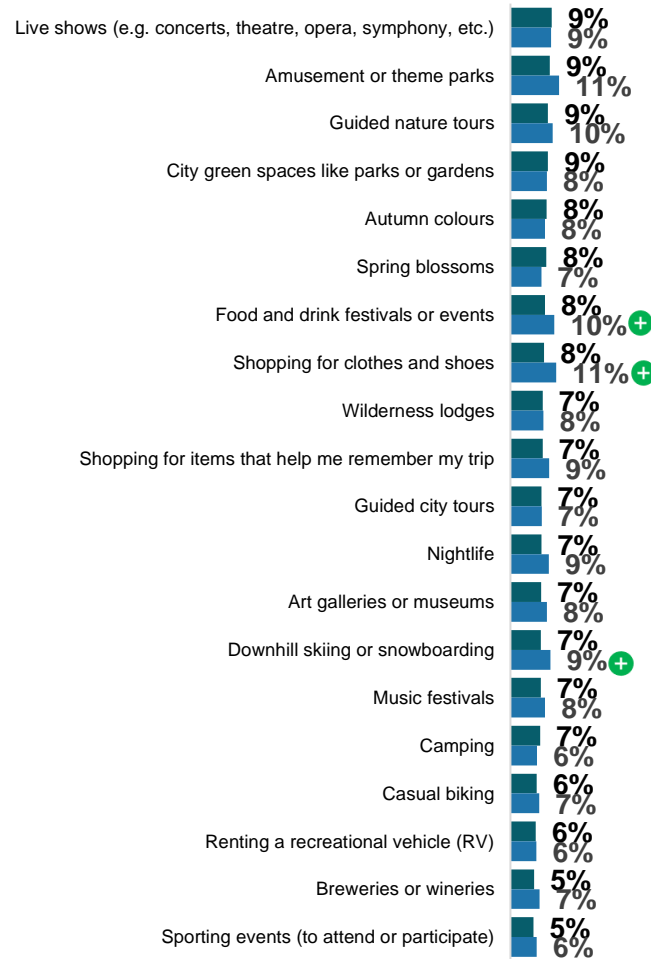
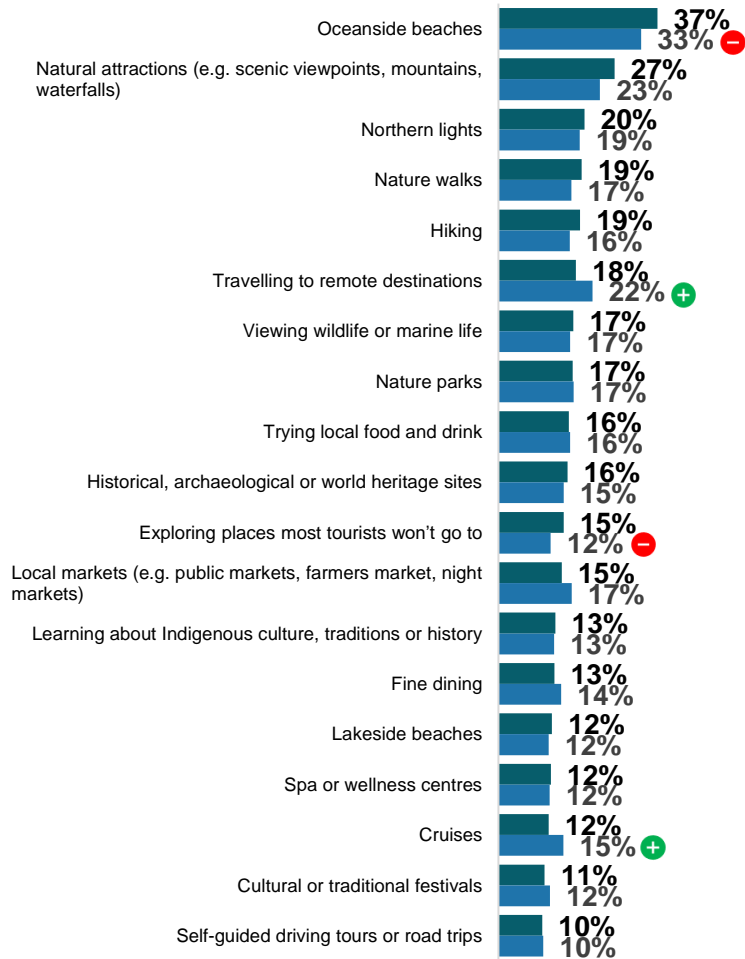
# General Activities Interested In

■ Total Germany ■ HVG Audience



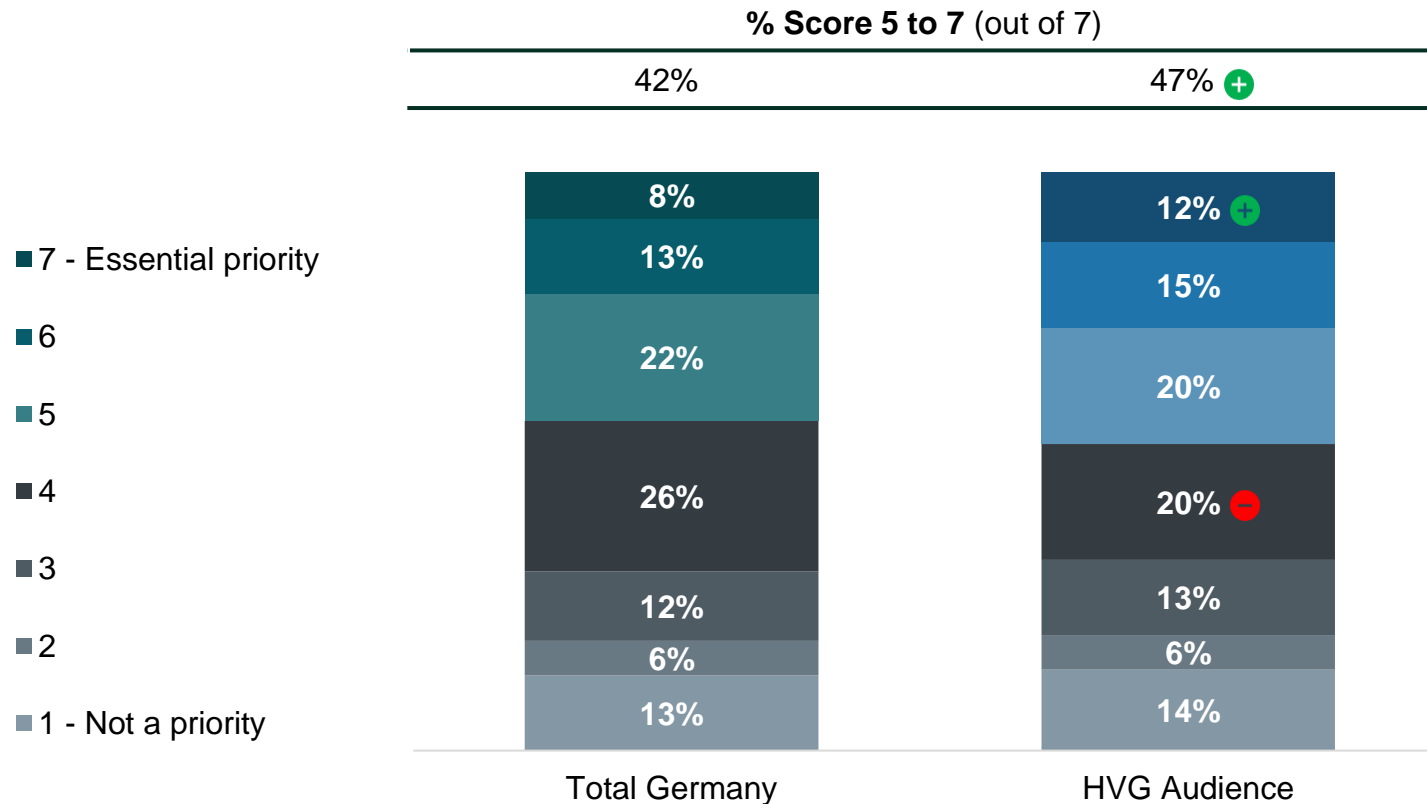
# Trip Anchor Activities

■ Total Germany ■ HVG Audience





# Priority of Sustainable Travel When Planning a Trip

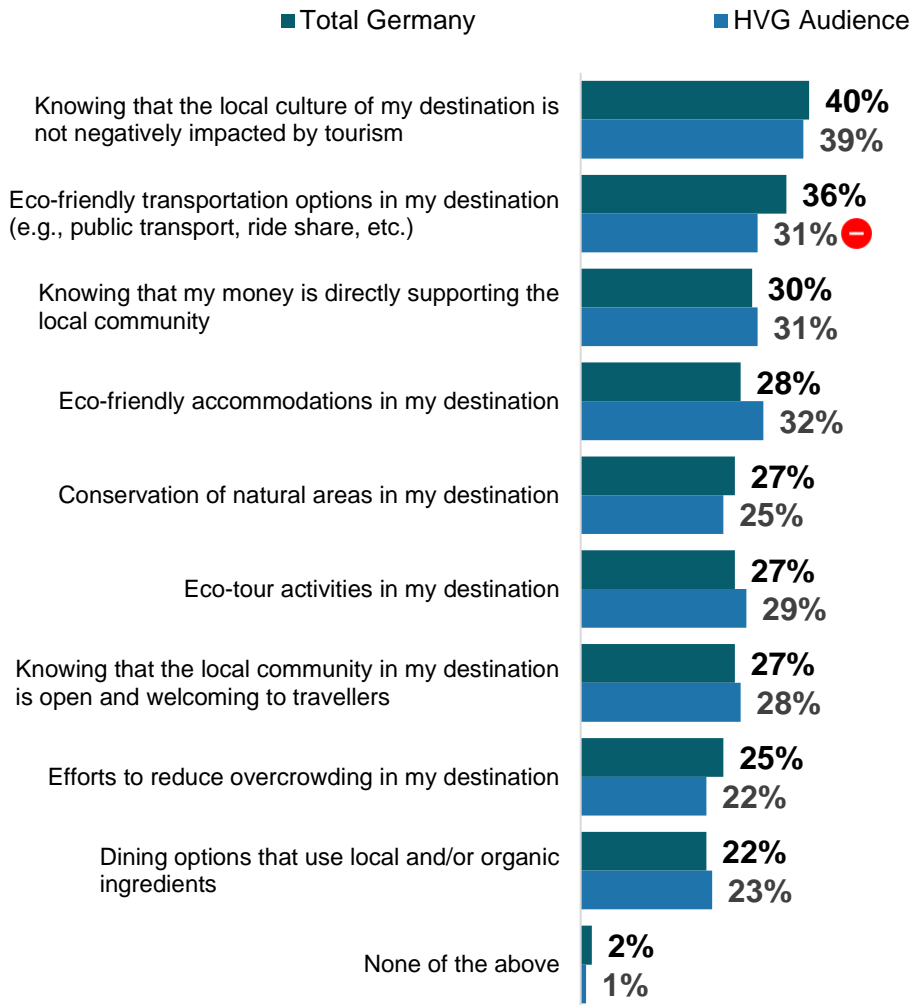


**Sustainable Travel Description**

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”.

47 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'.

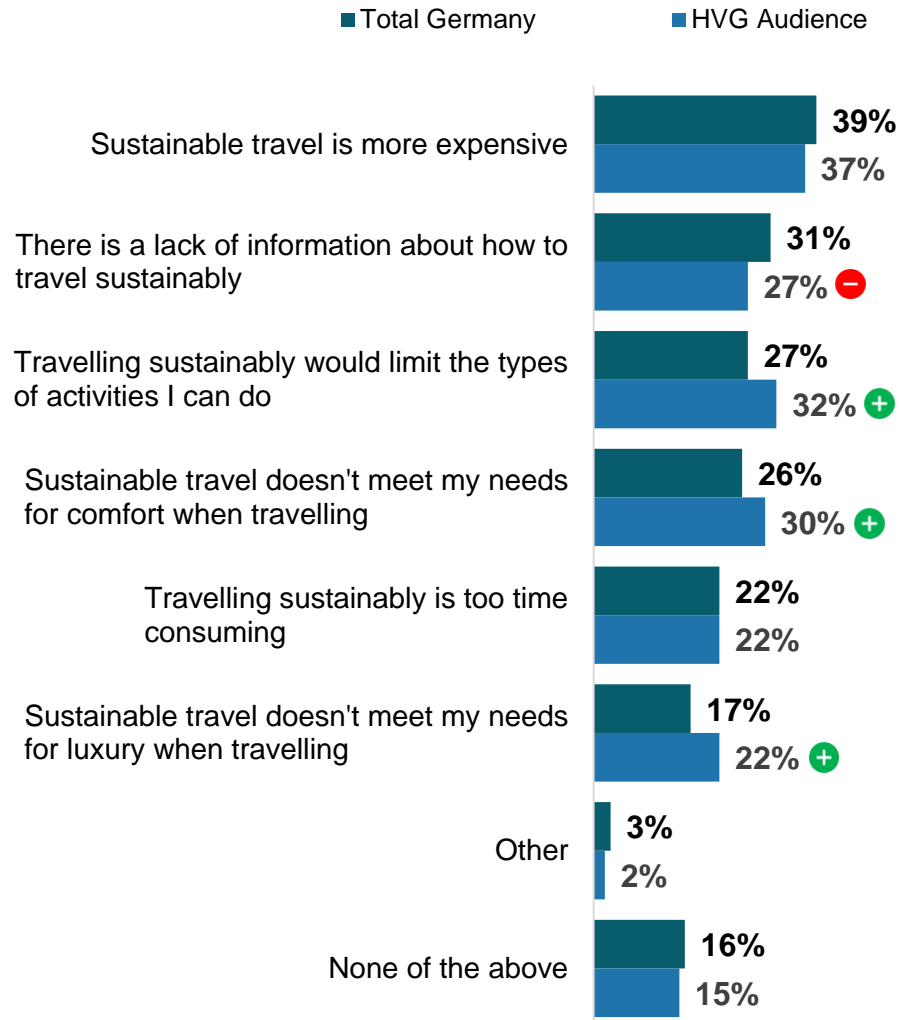
# Top 3 Most Important Sustainability Efforts



## 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”.

# Barriers to Sustainable Travel

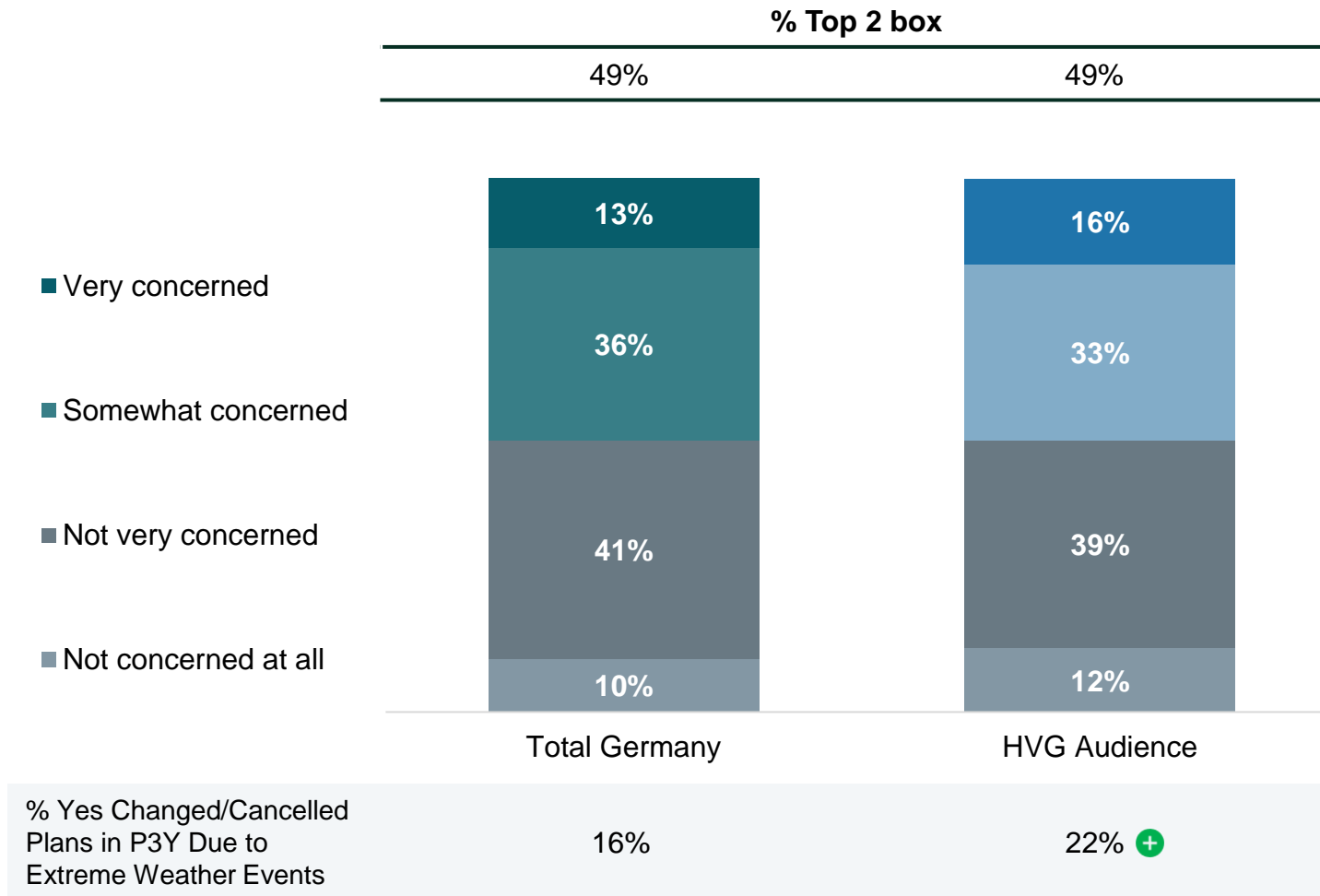


## Sustainable Travel Description

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”.



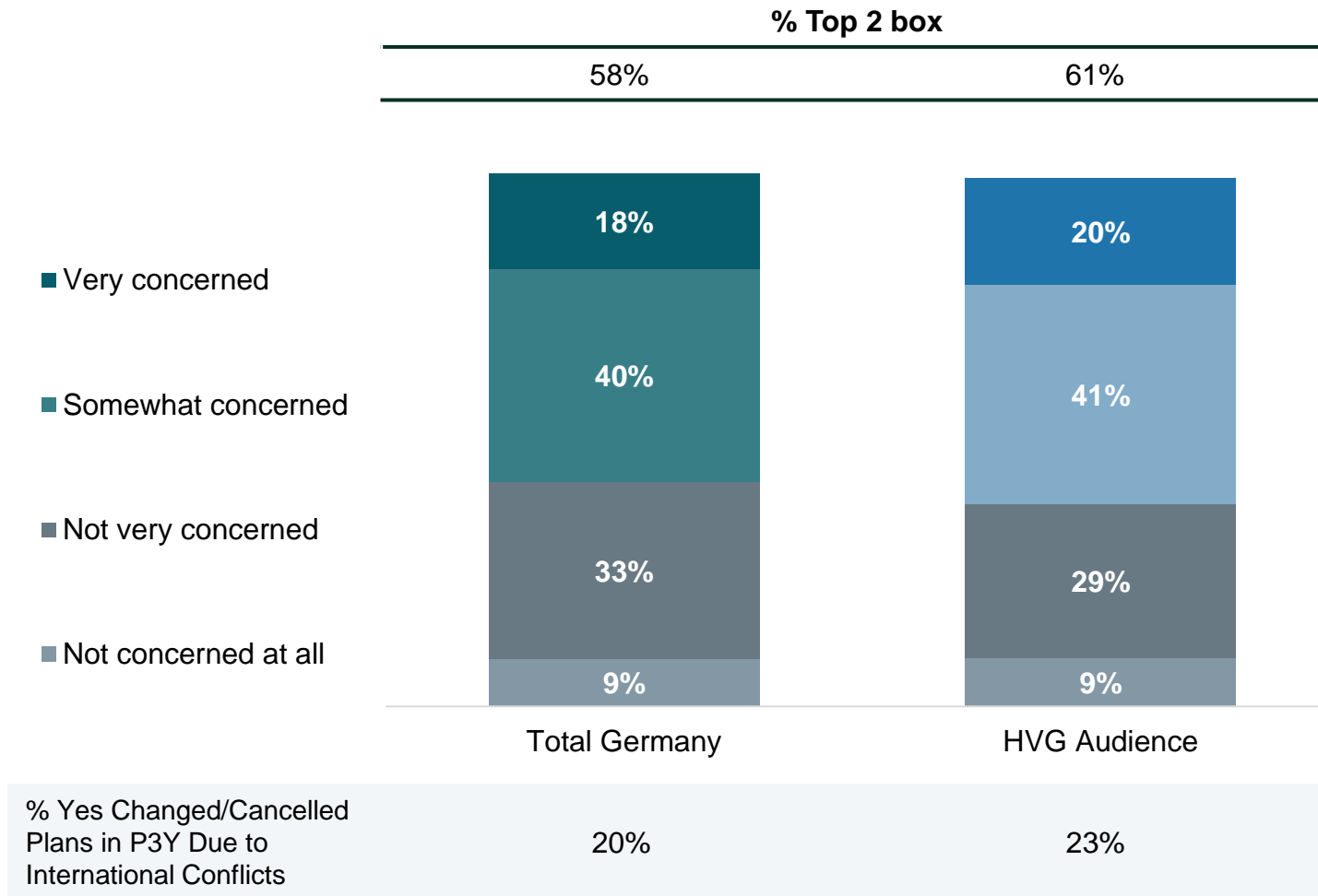
# Impact of Extreme Weather Events on Travel Plans



## 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.

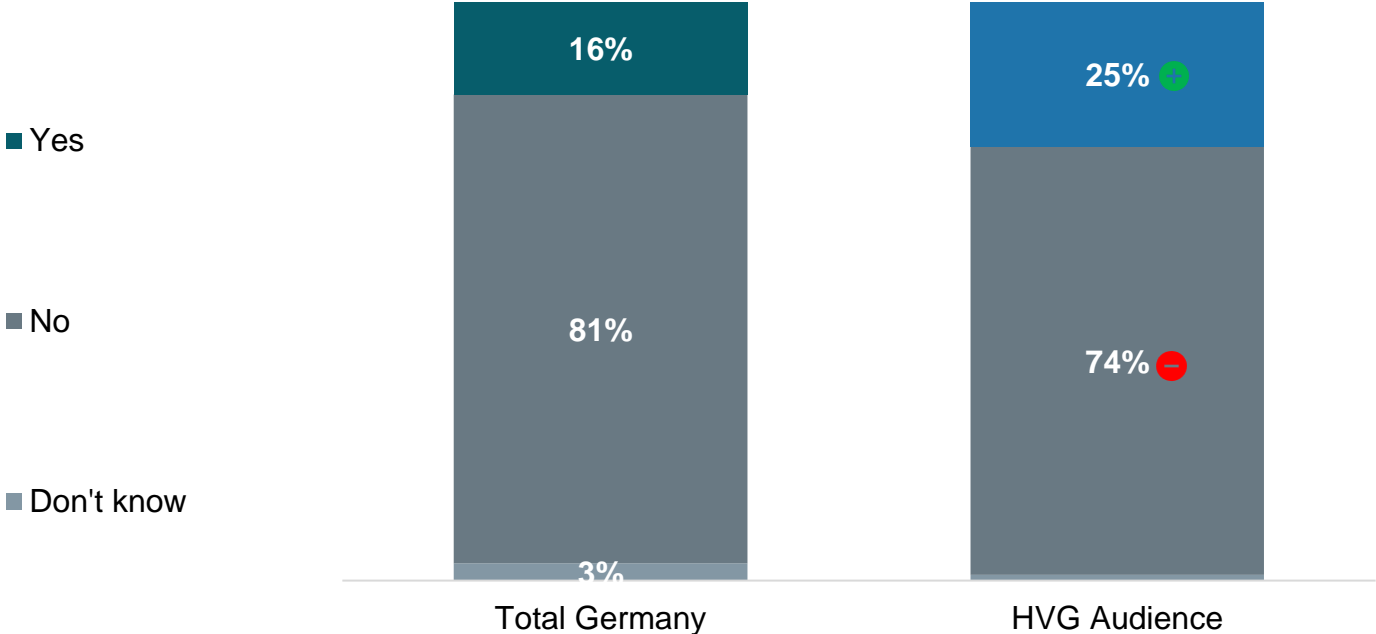
# Impact of International Conflicts & Unrest on Travel Plans



## International Conflicts Description

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

# Usage of AI Tools to Plan Trips







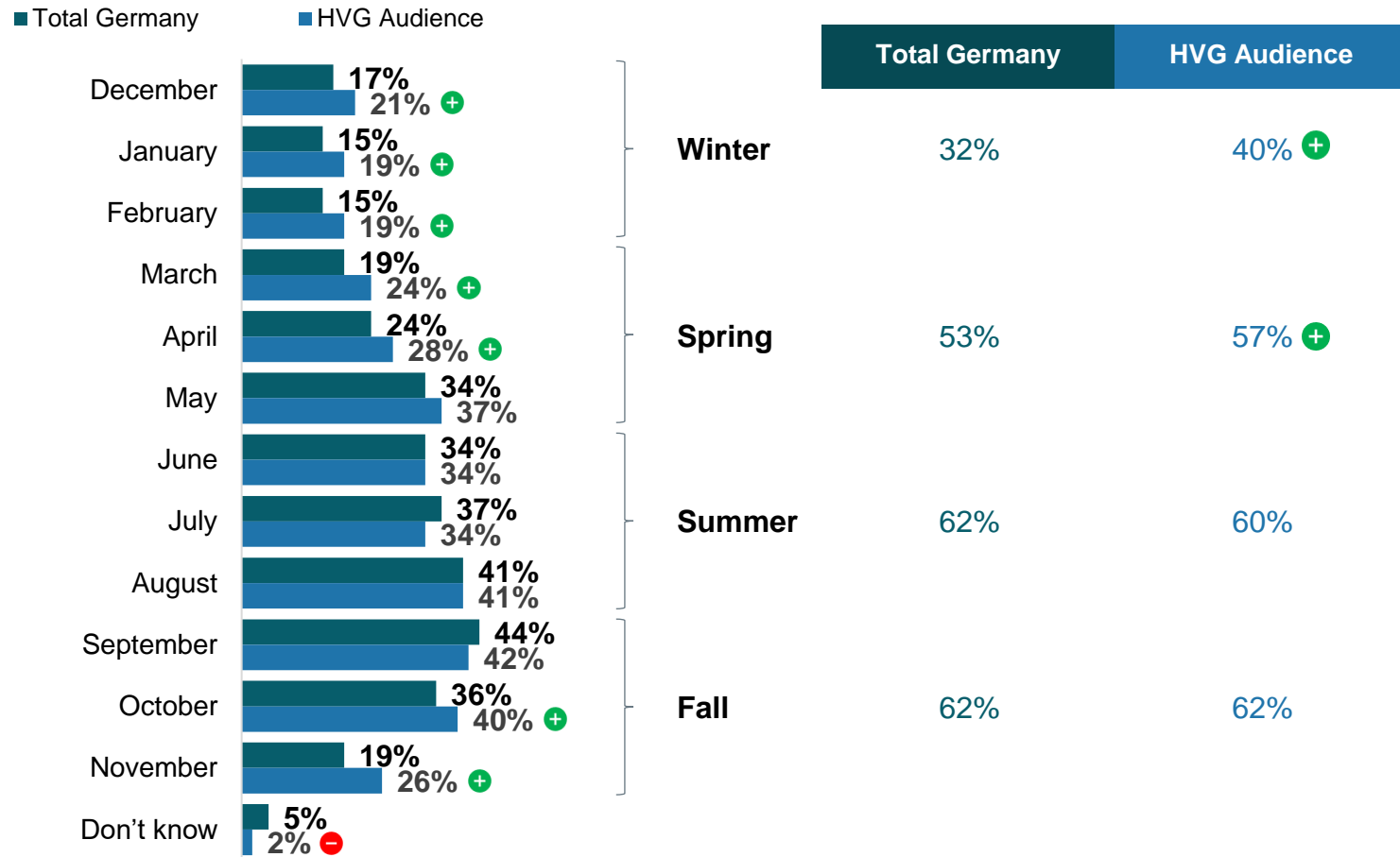
# Seasonal Travel



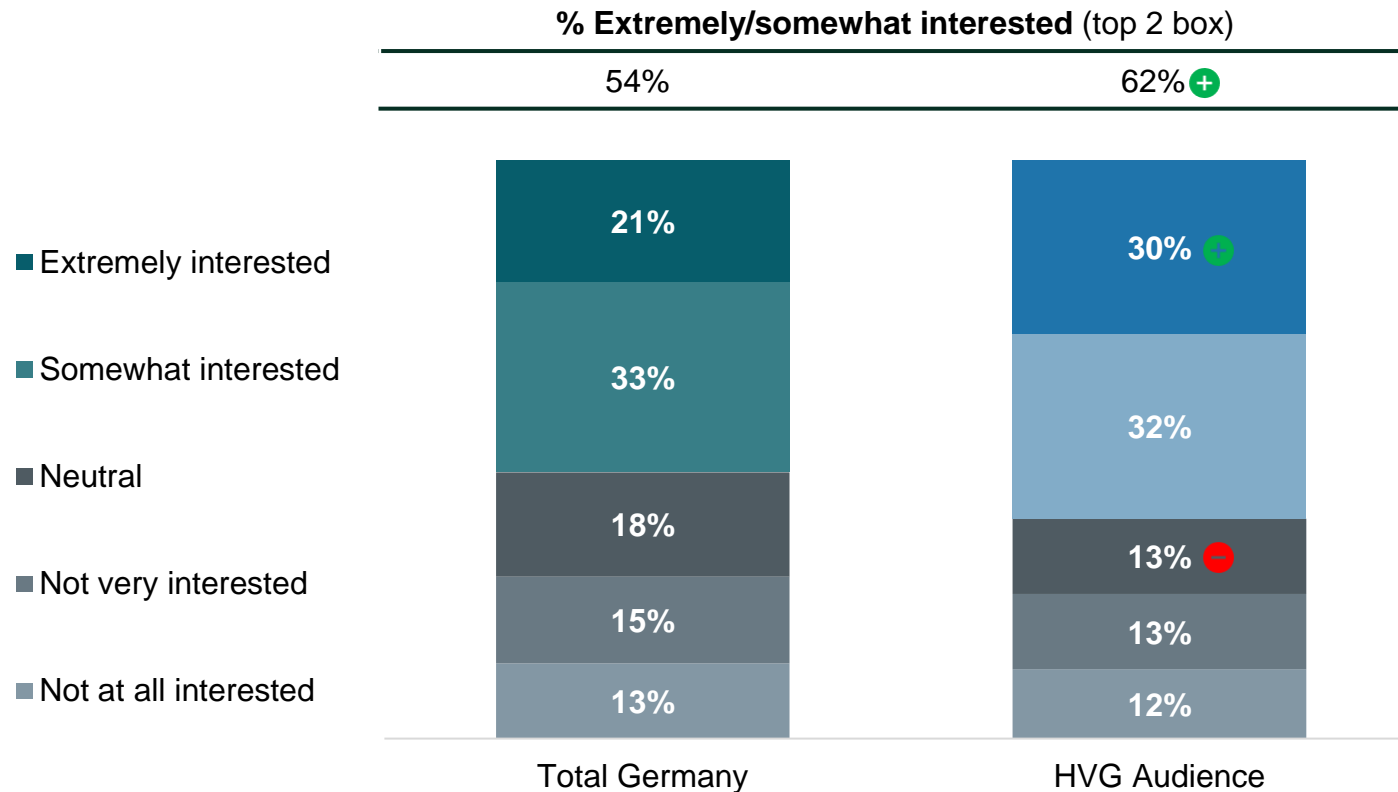
Yellowknife  
Northwest Territories



# Preferred Time of Year for Holiday Trips



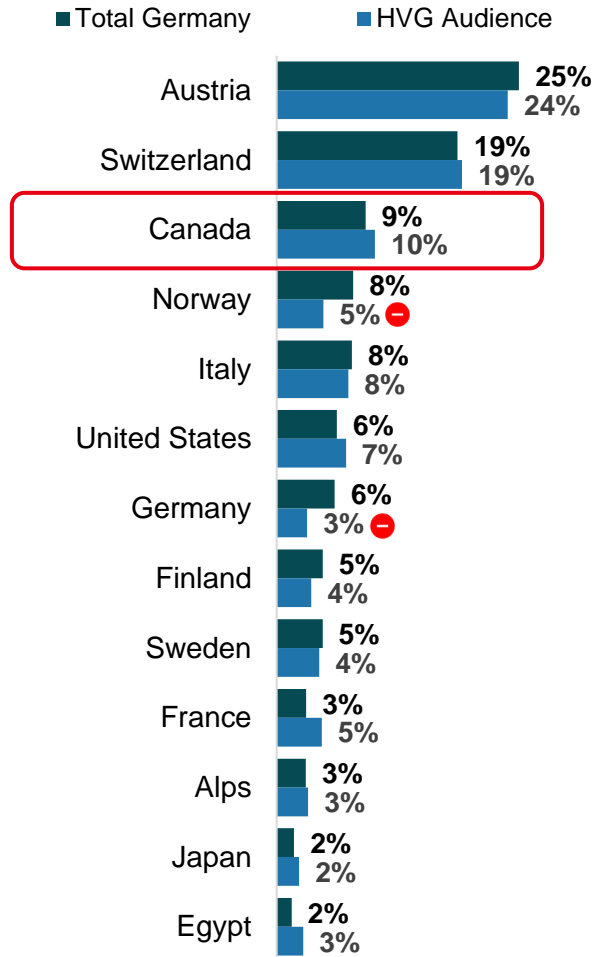
# Interest in Winter Holidays



## 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.

# Unaided Winter Destinations



## 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.

Note: respondents were asked either about winter travel (B2/D2) or autumn/fall travel (B3/D3)

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=731); HVG (n=218)

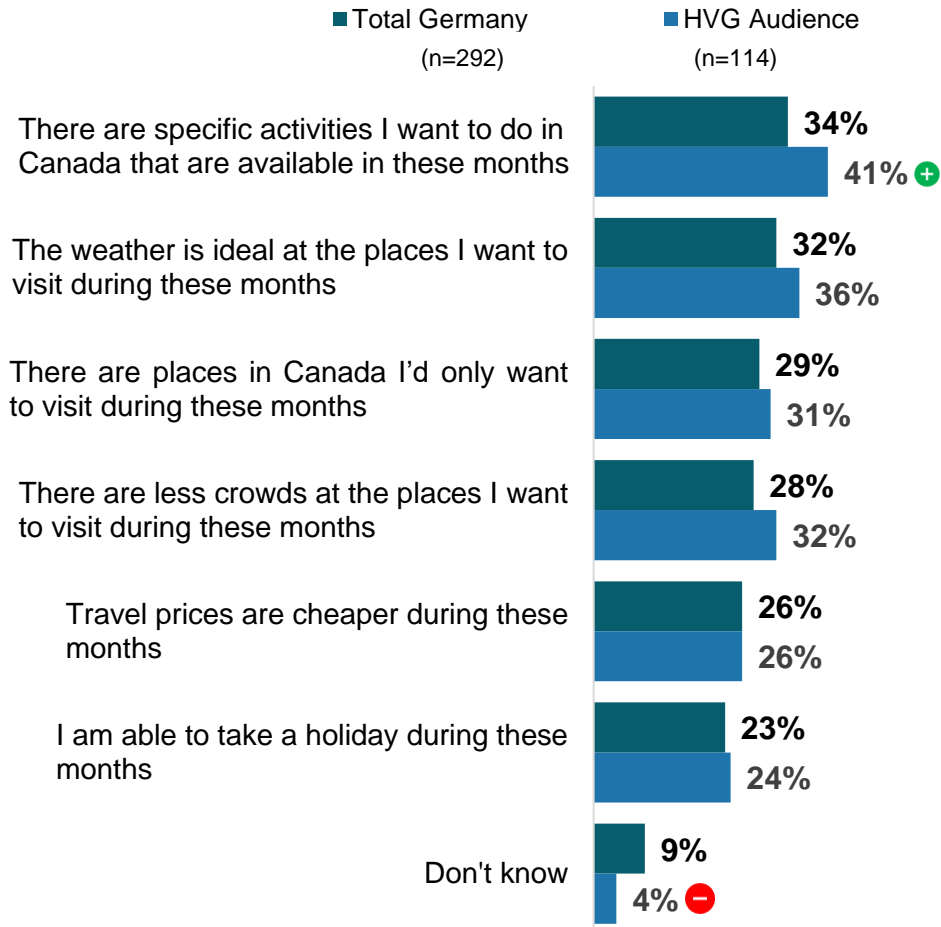
B2. What destinations come to mind when thinking about travel to experience the **winter season**? (Please list up to 3 destinations. You can mention destinations within or outside of Europe, North Africa and the Mediterranean.) [DESCRIPTION] Please note: You do not have to limit your responses to destinations you are considering for a holiday trip.



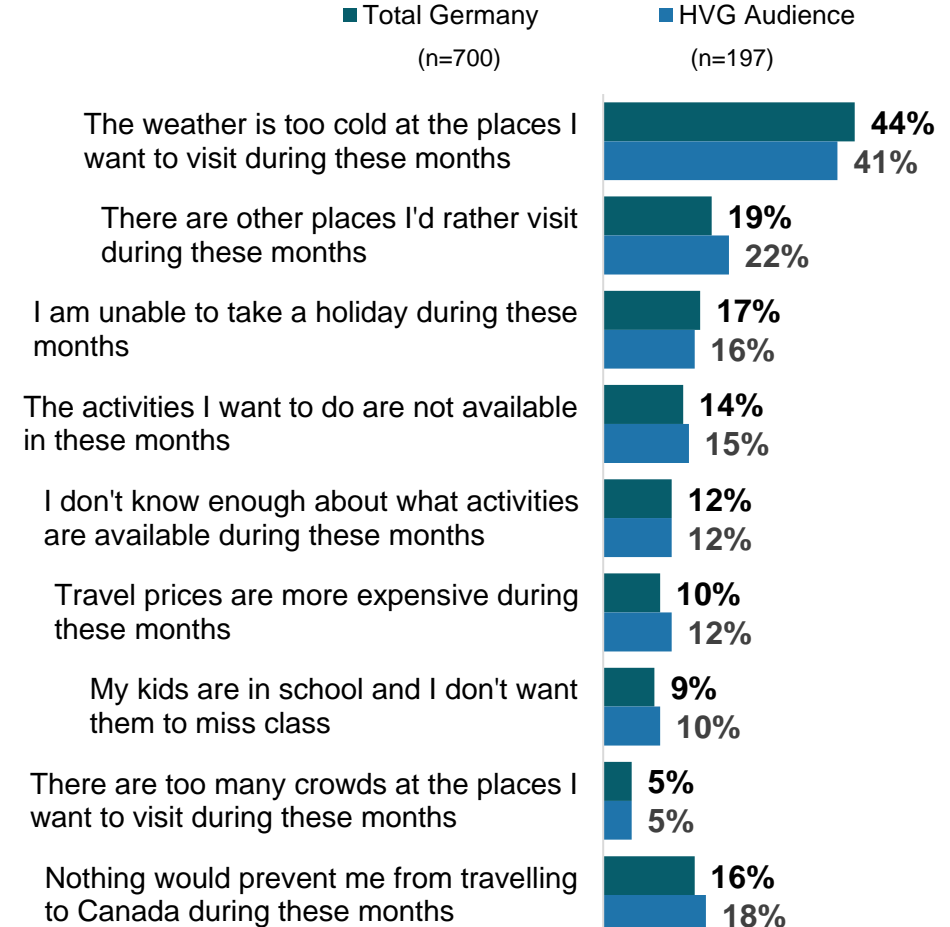
# Motivators & Barriers for Winter Travel to Canada



## 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**?

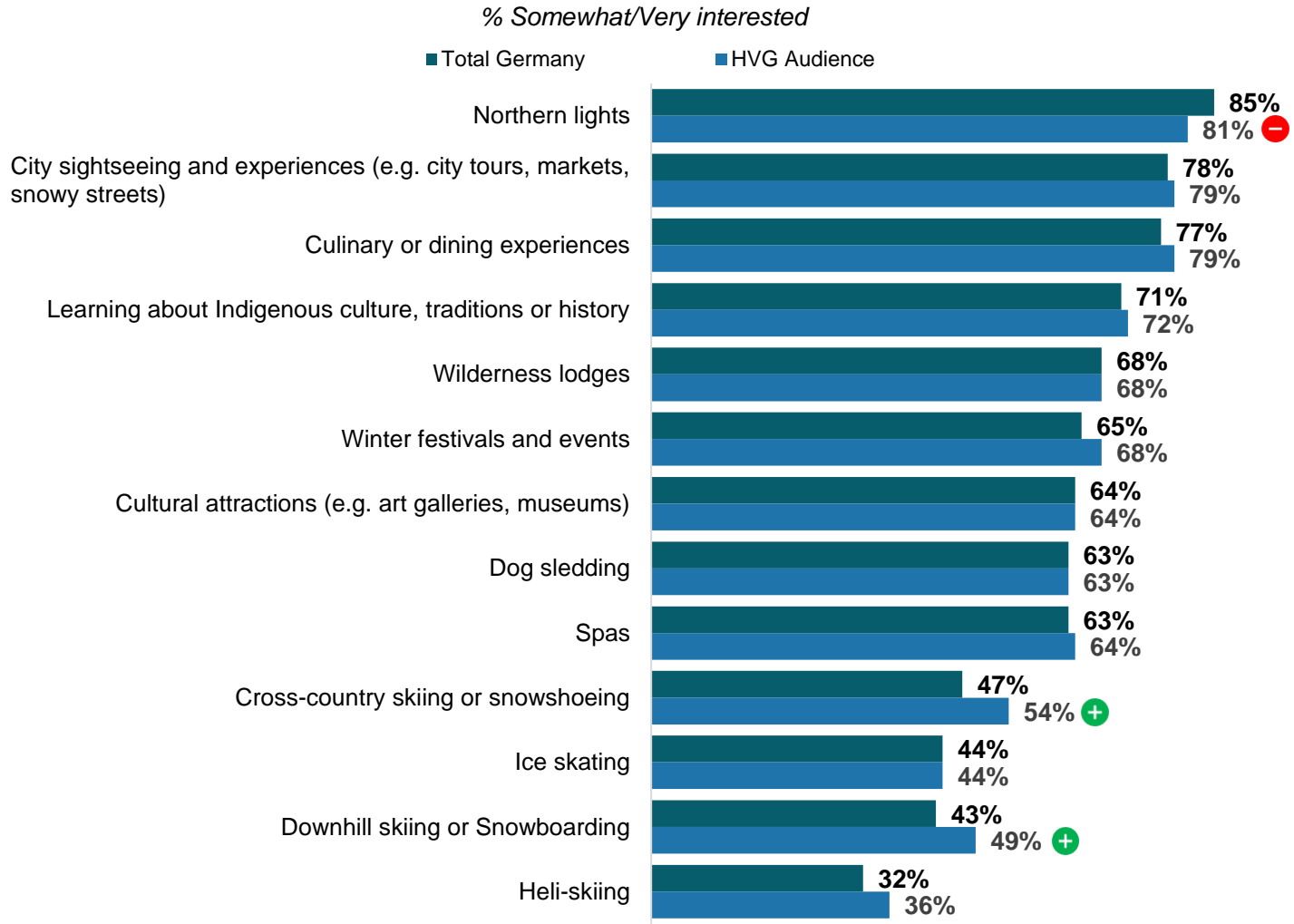
Base: Those in the dream to purchase stages of the path to purchase for Canada and not considering visiting Canada or any province/territory in December, January or February E9. You indicated earlier that you are not considering taking a holiday to **Canada** during the months of December, January and/or 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)

Germany GTRP – December 2023

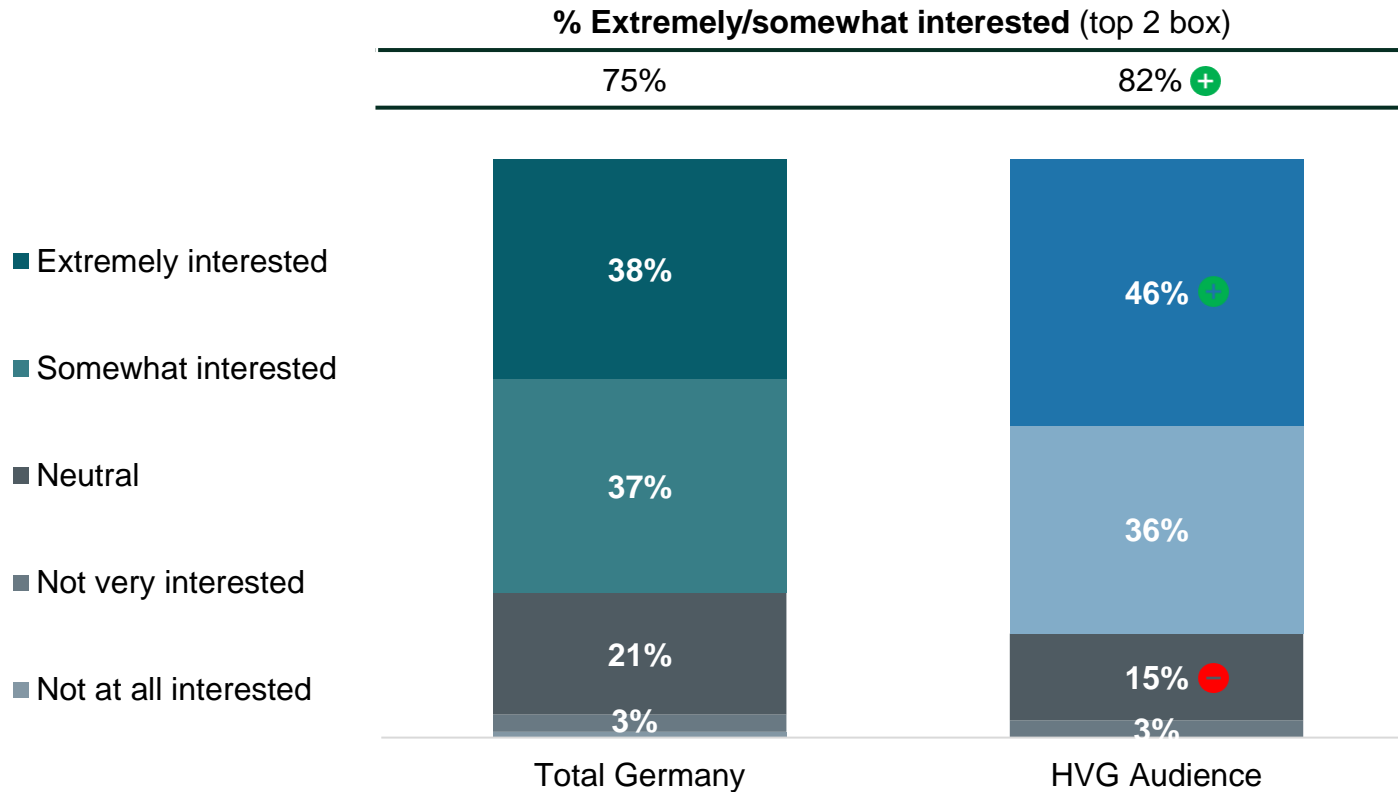


# Interest in Winter Activities in Canada





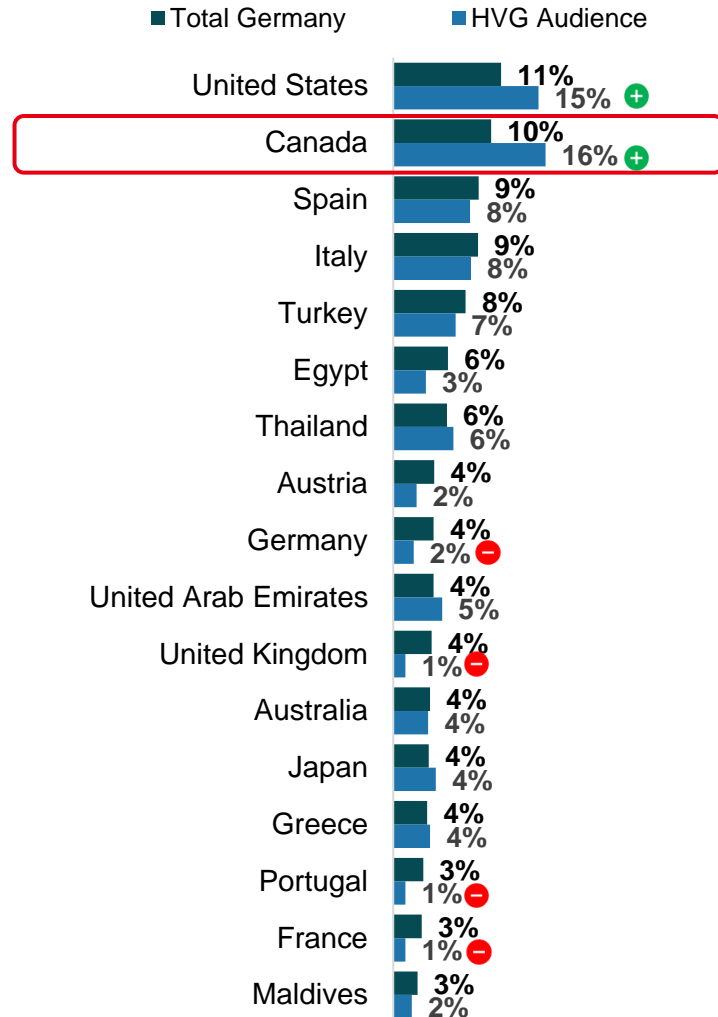
# Interest in Fall Holidays



## 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.

# Unaided Fall Destinations



## 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.

Note: respondents were asked either about winter travel (B2/D2) or autumn/fall travel (B3/D3)  
 Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=787); HVG (n=238)

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.



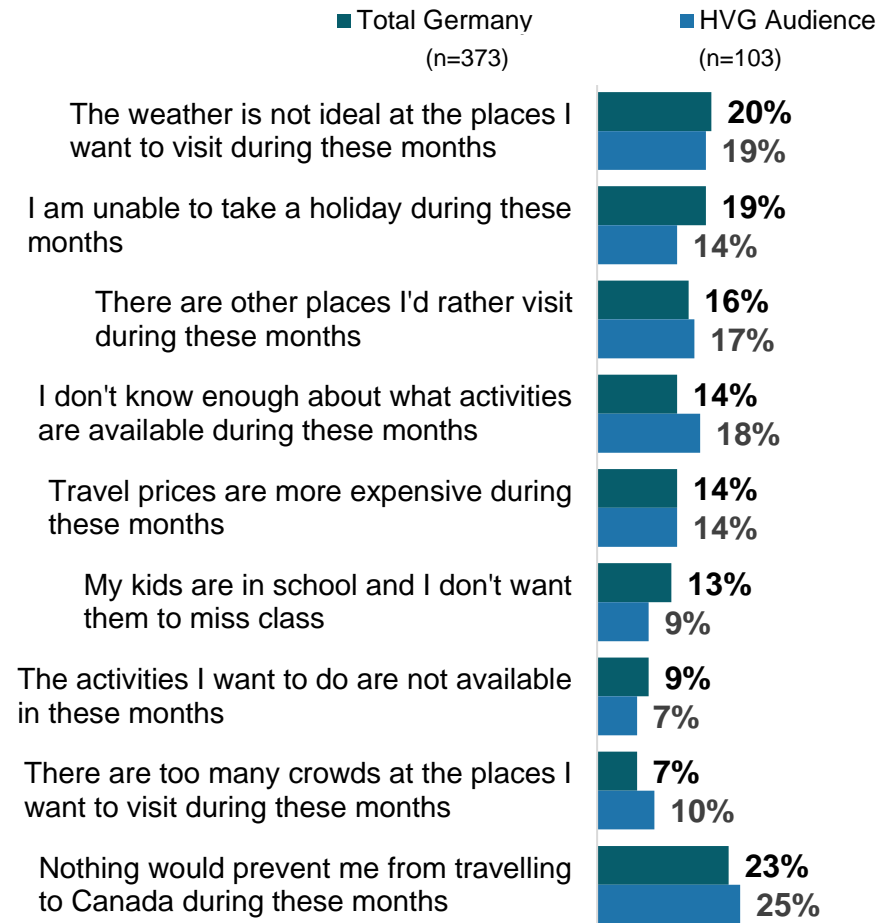
# Motivators & Barriers for Fall Travel to Canada



## 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**?

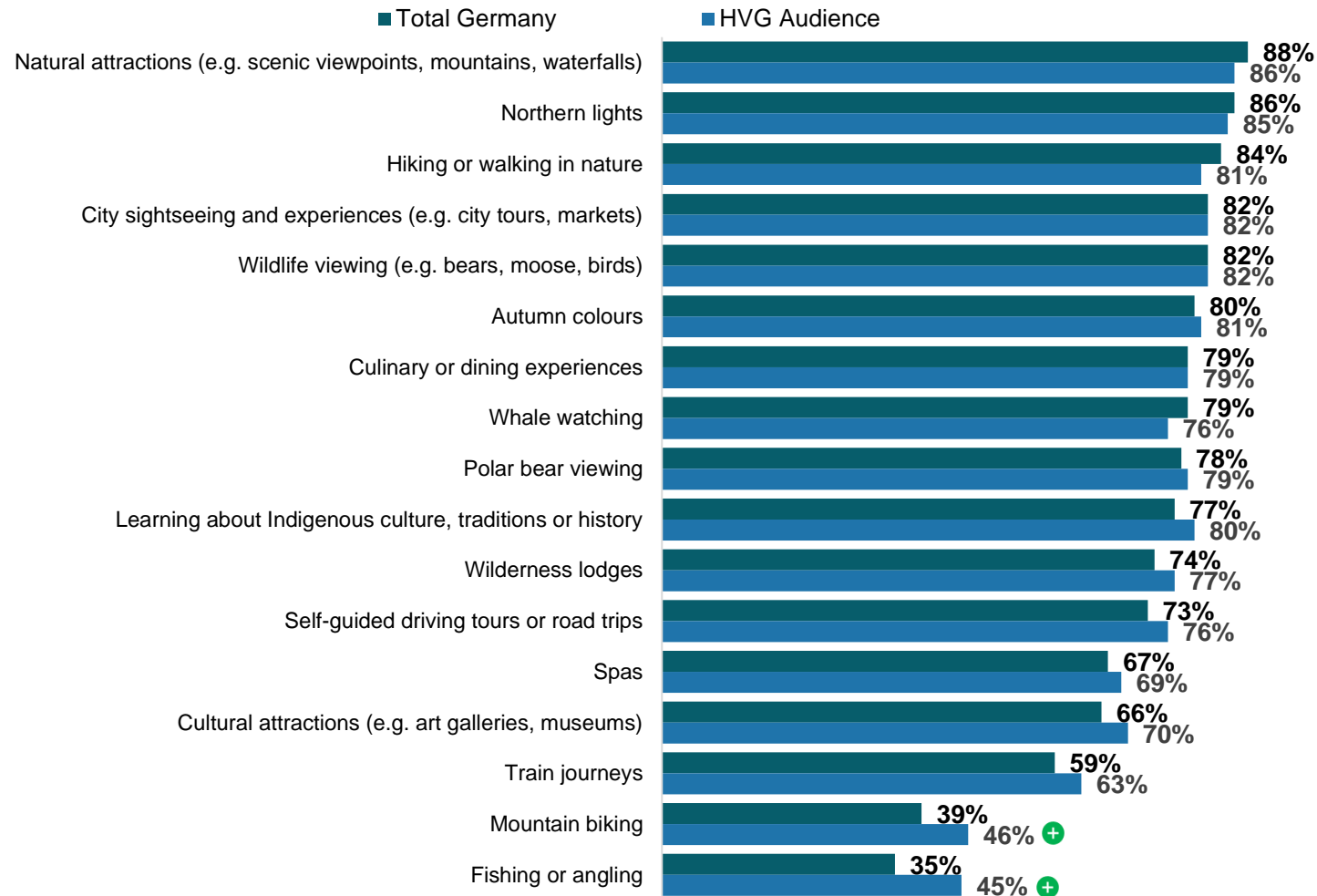
Germany GTRP – December 2023

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



# Interest in Fall Activities in Canada

% Somewhat/Very interested



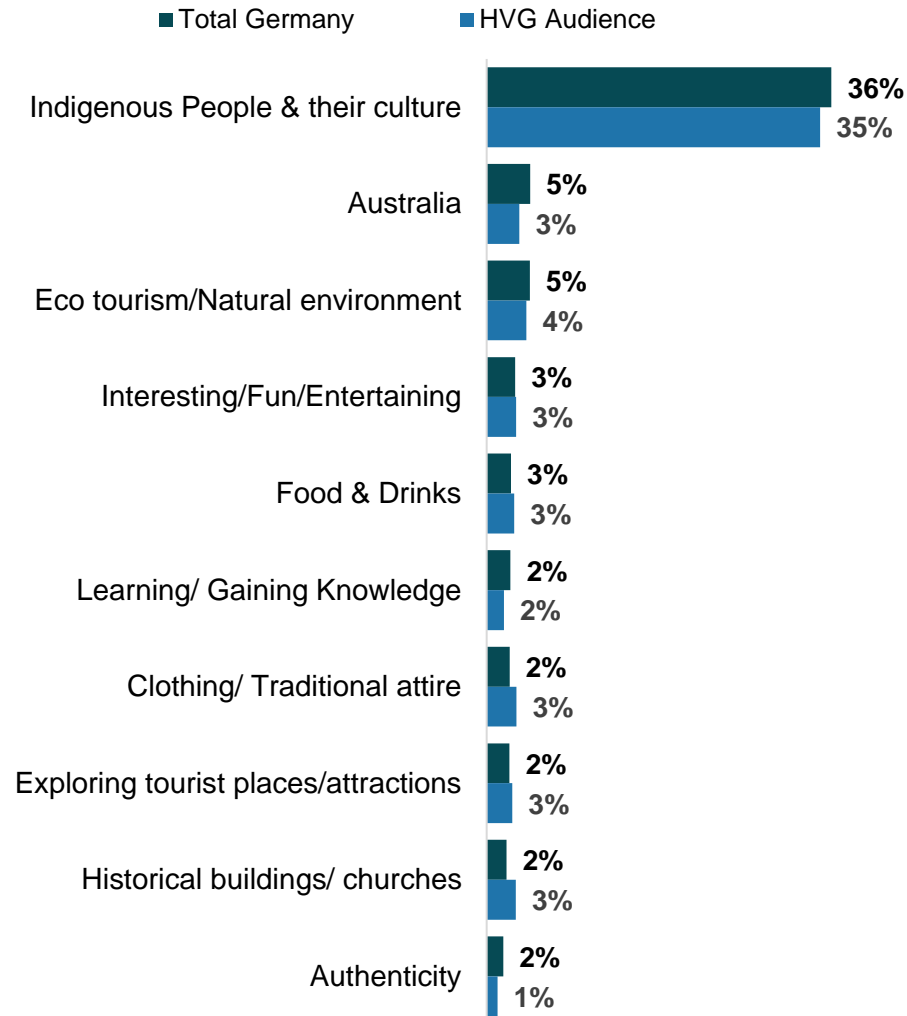




# Indigenous Tourism



# Unaided Mentions – Indigenous Cultural & Tourism Activities



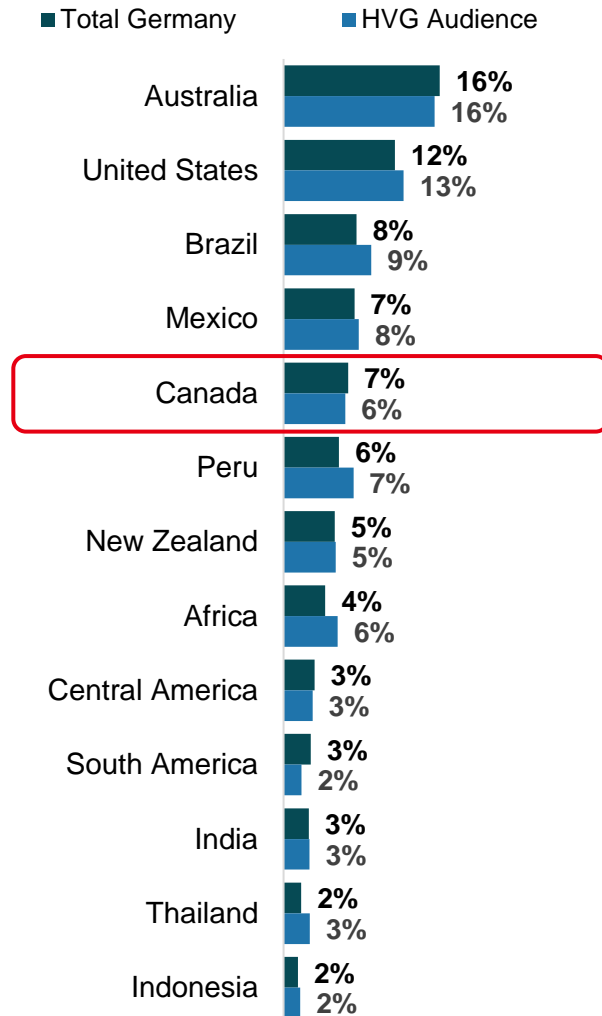
## Indigenous Peoples Description

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.





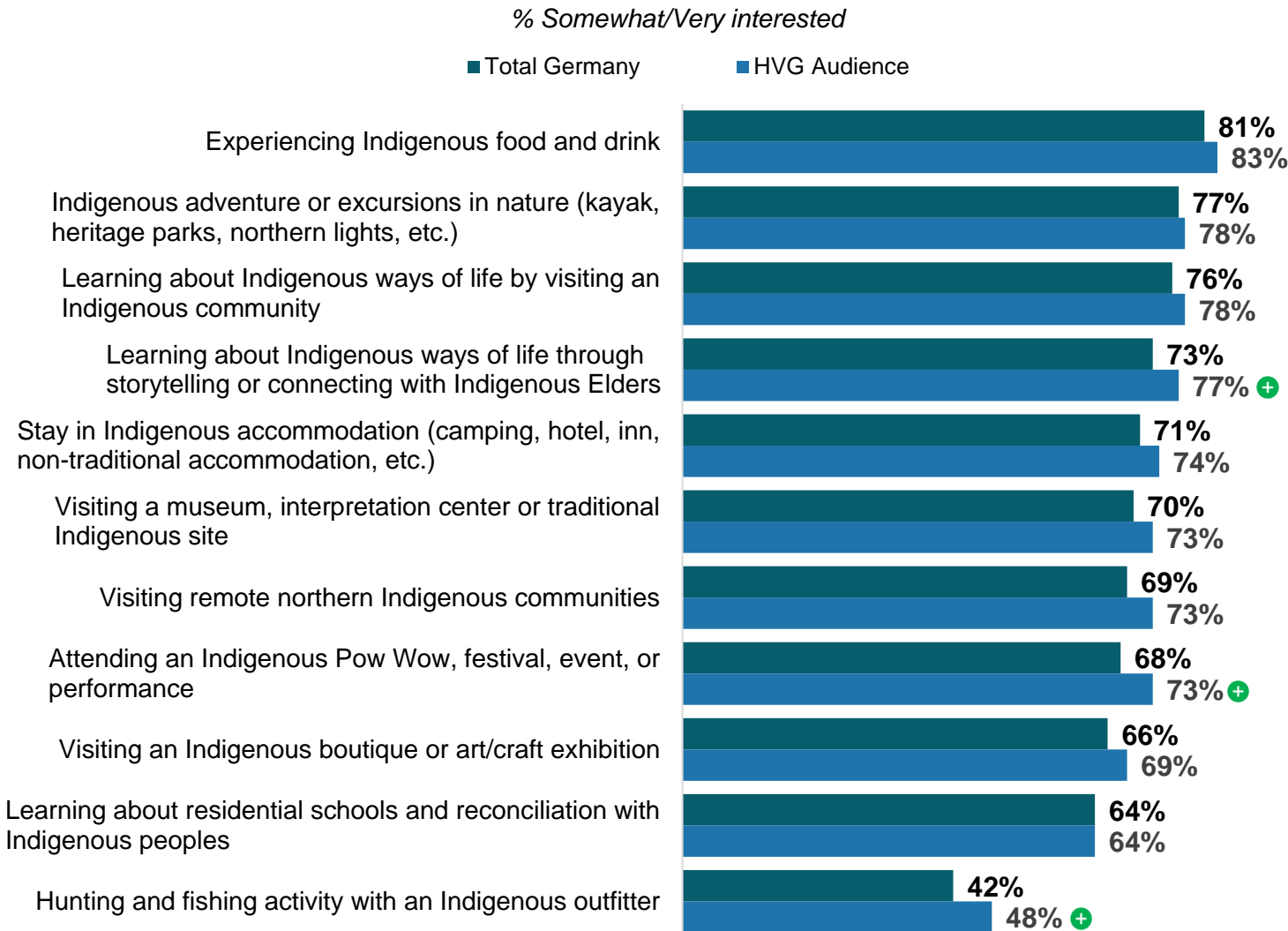
# Unaided Indigenous Tourism Destinations



## 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.

# Interest in Indigenous Cultural & Tourism Activities



## 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.



# Most Recent Trip



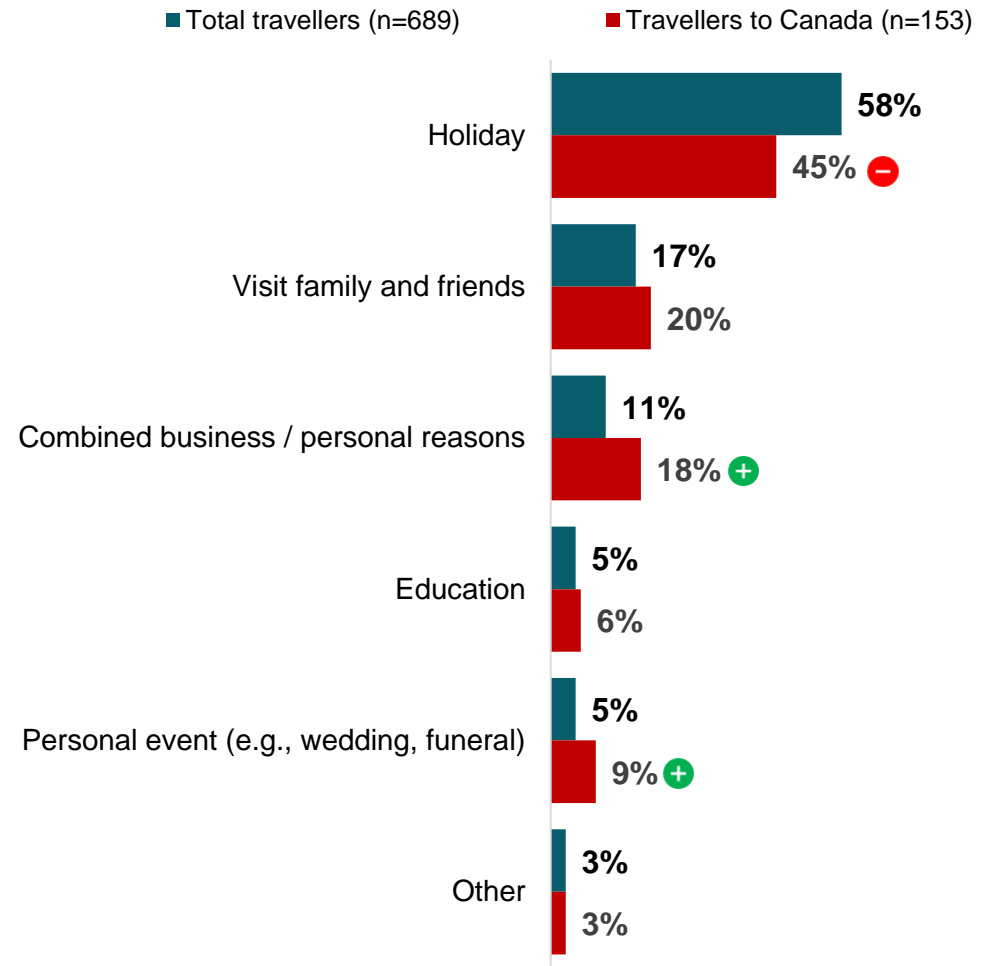
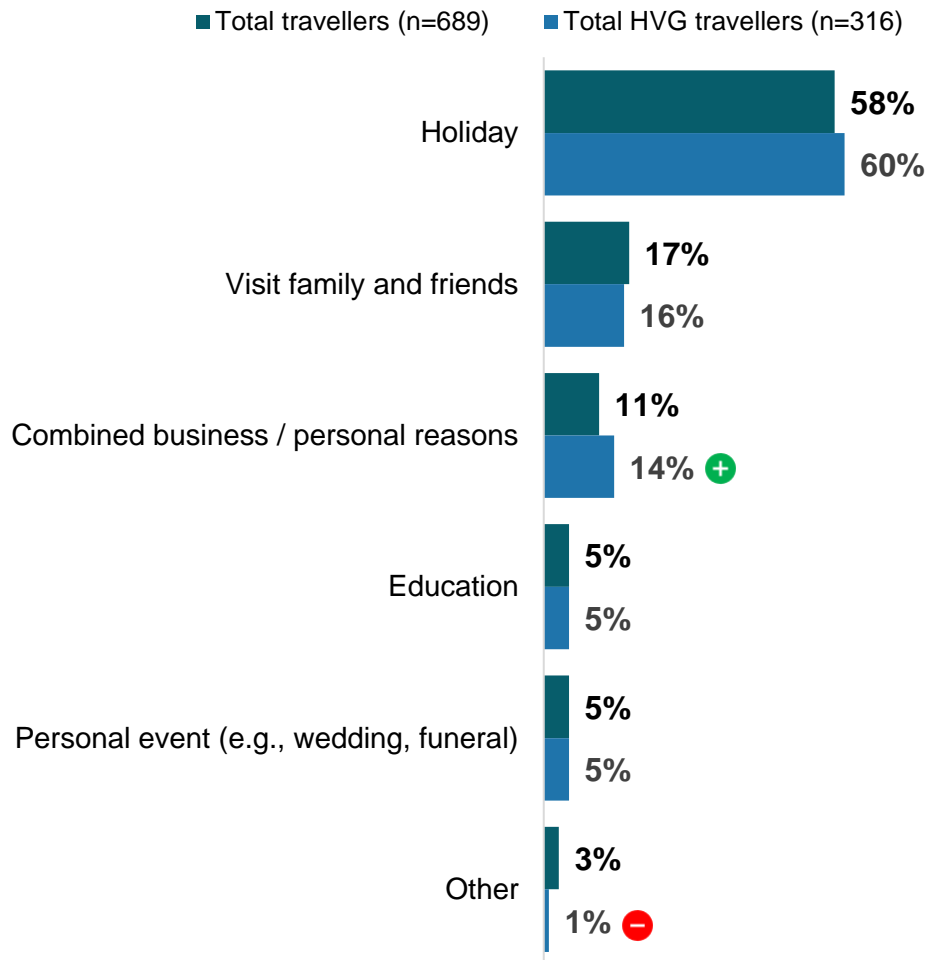
Lake Louise  
Alberta



# Main Purpose of Recent Trip

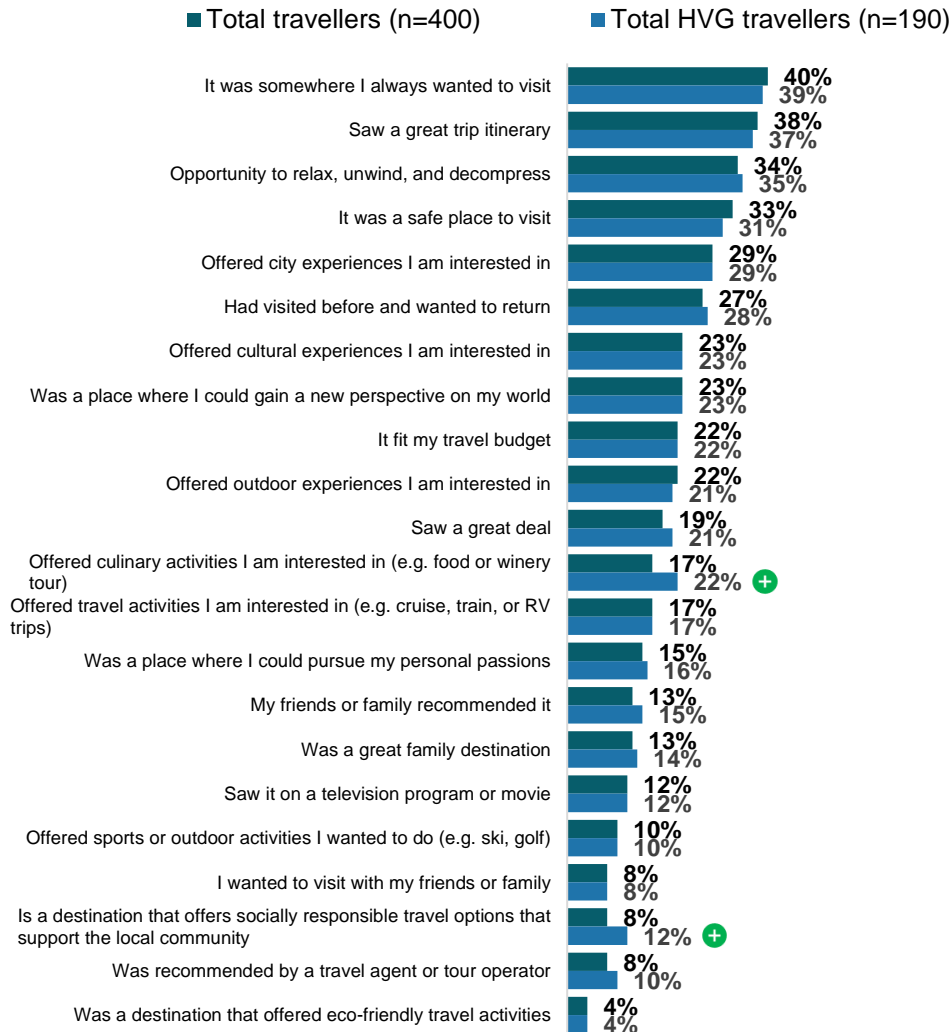
**Total Travellers to Any Destination vs. HVG Travellers to Any Destination**

**Total Travellers to Any Destination vs. Total Travellers to Canada**

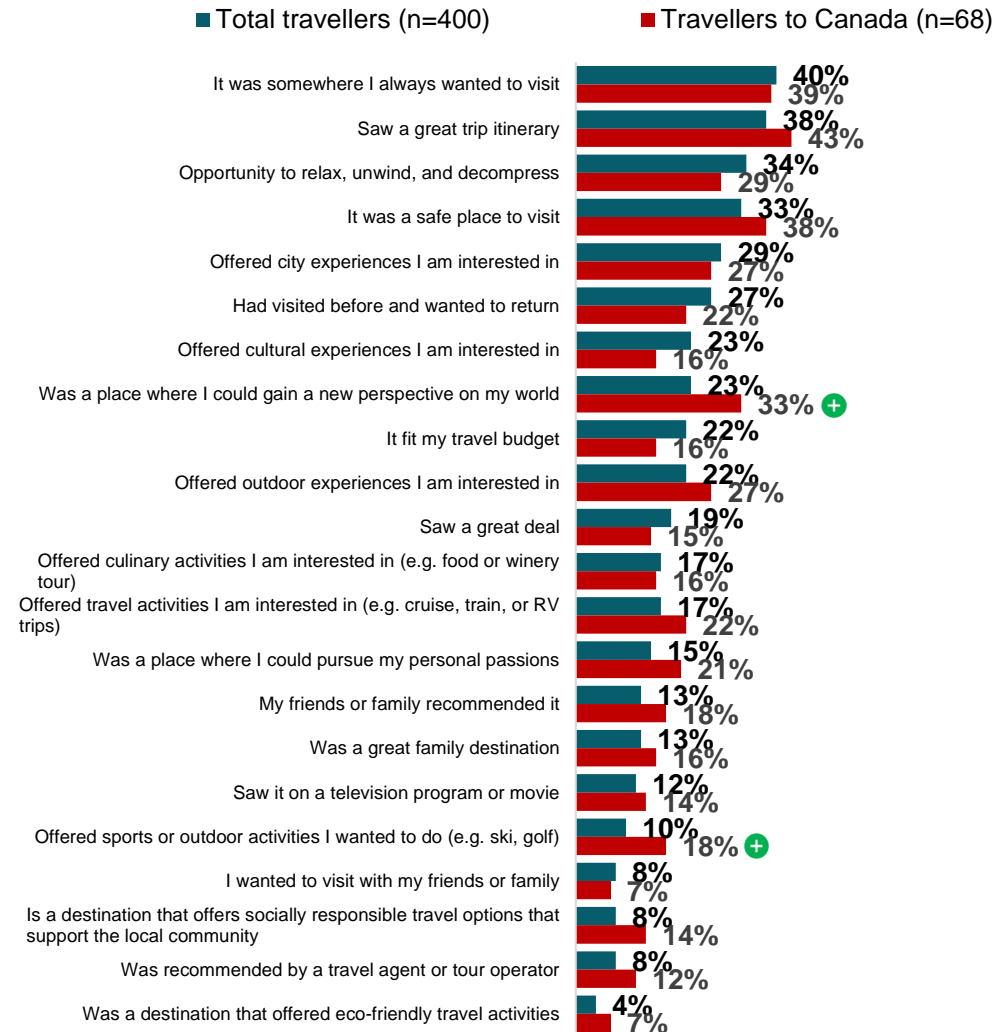


# Factors in Choosing Destination for Recent Trip

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

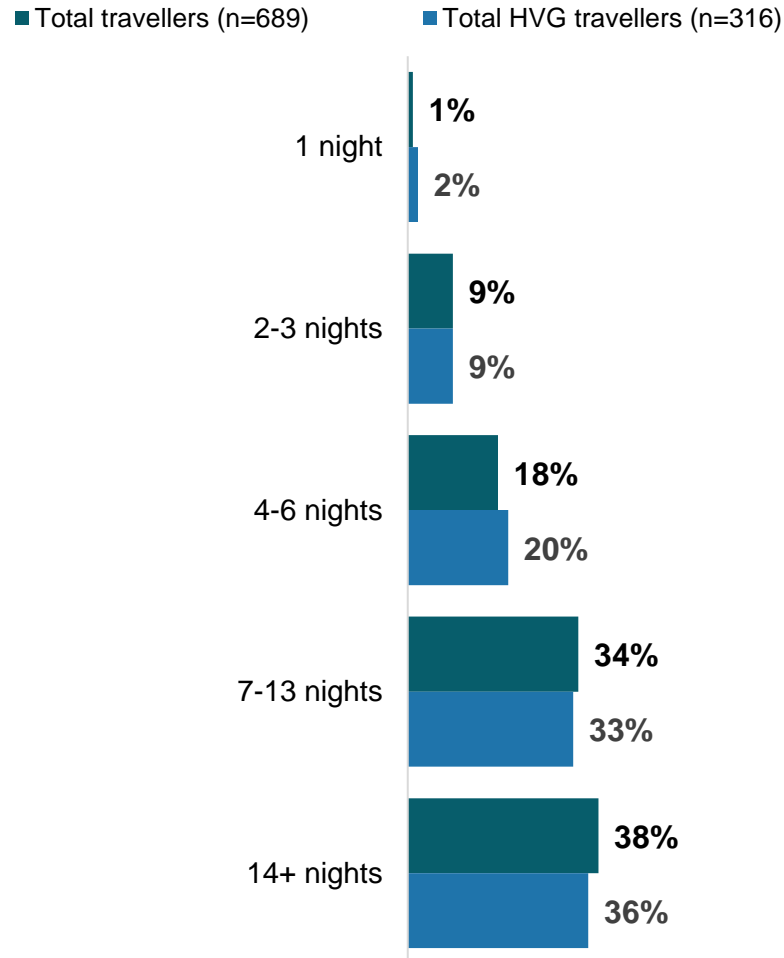


## Total Travellers to Any Destination vs. Total Travellers to Canada

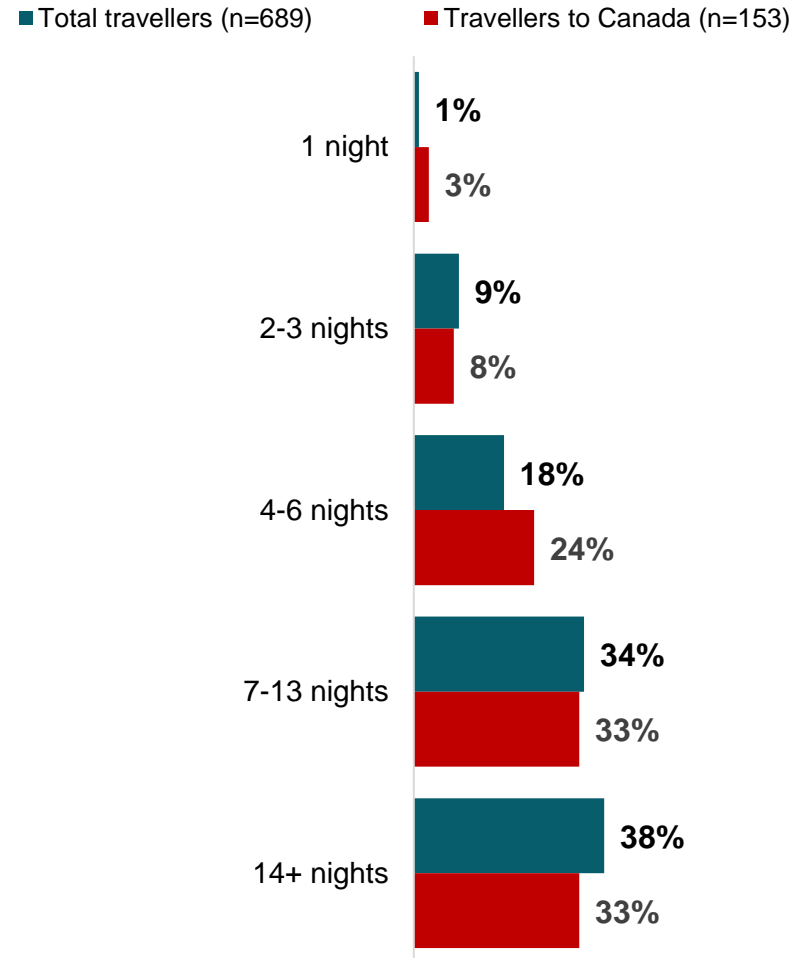


# Nights Spent During Recent Trip

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



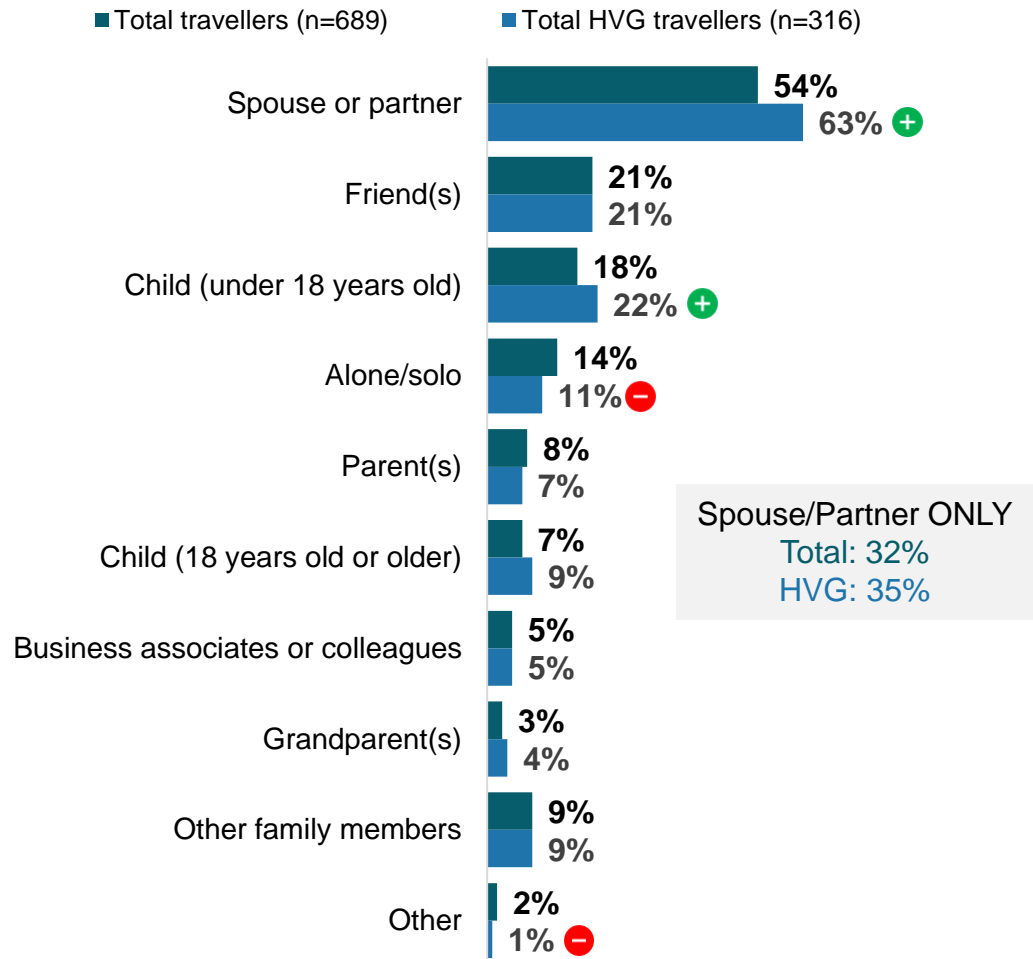
**Total Travellers to Any Destination vs. Total Travellers to Canada**



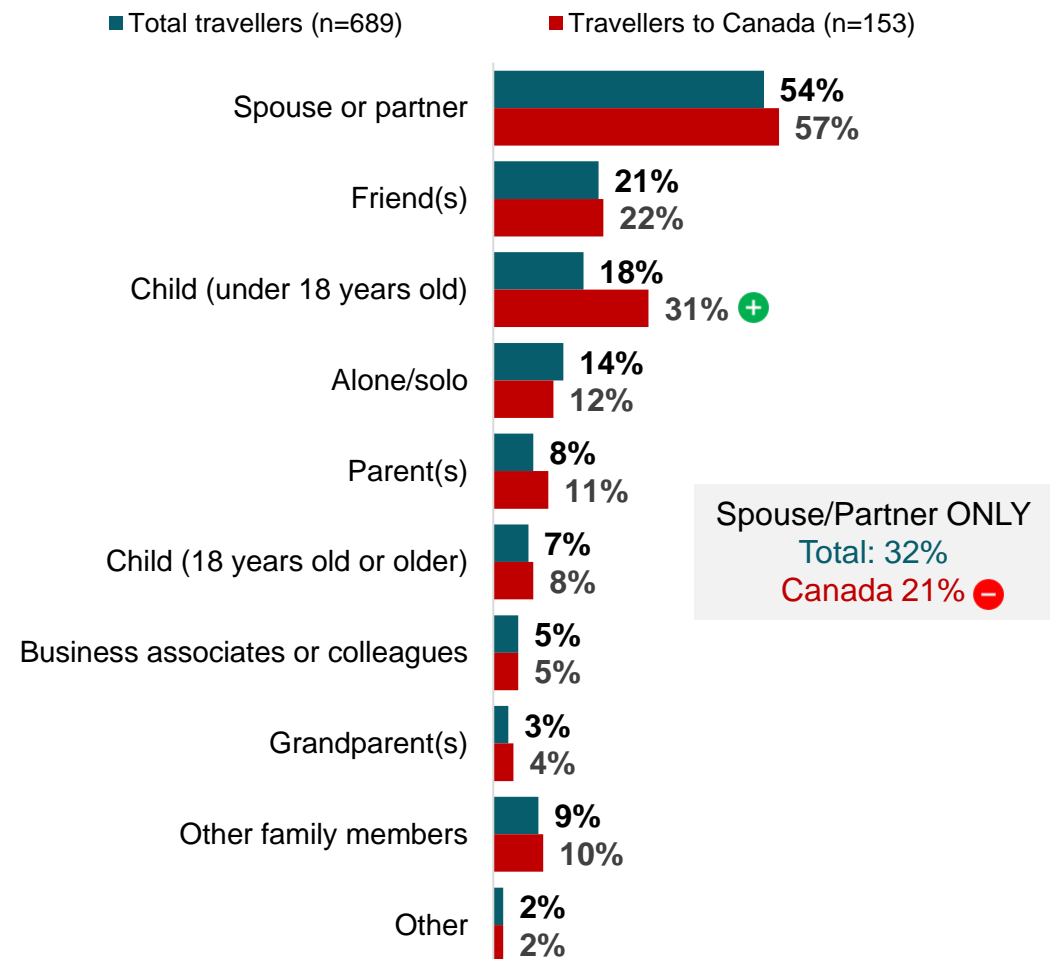


# Travel Party of Recent Trip

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

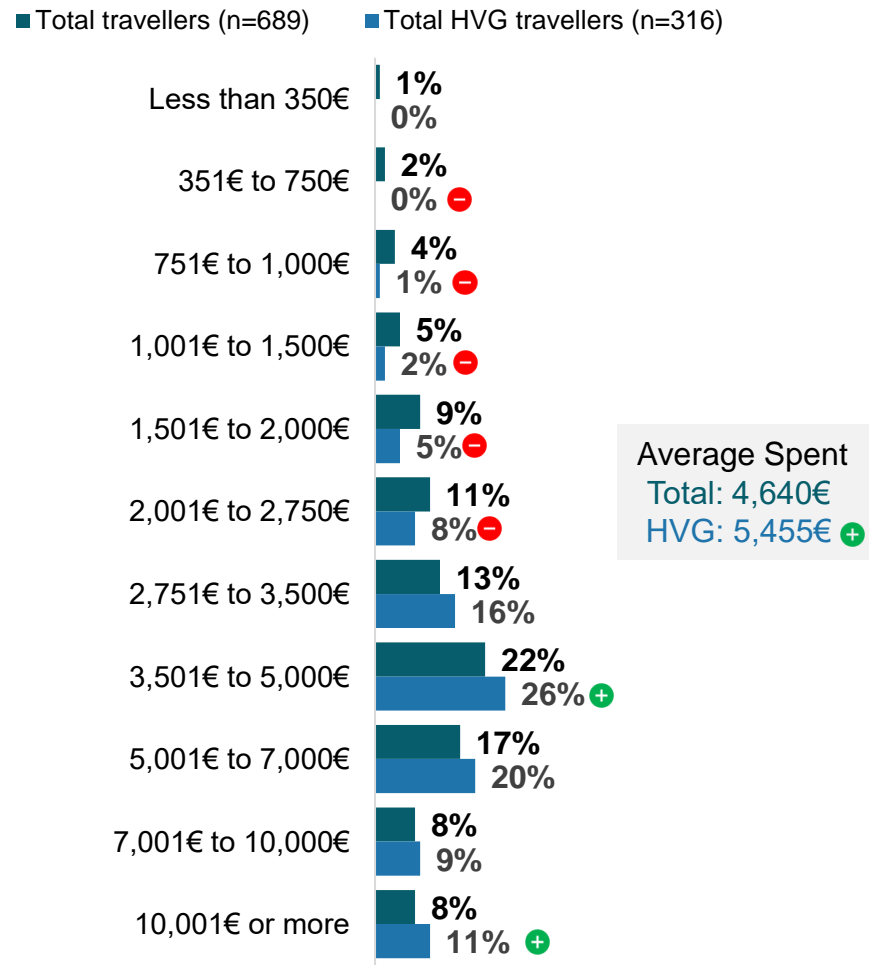


**Total Travellers to Any Destination vs. Total Travellers to Canada**

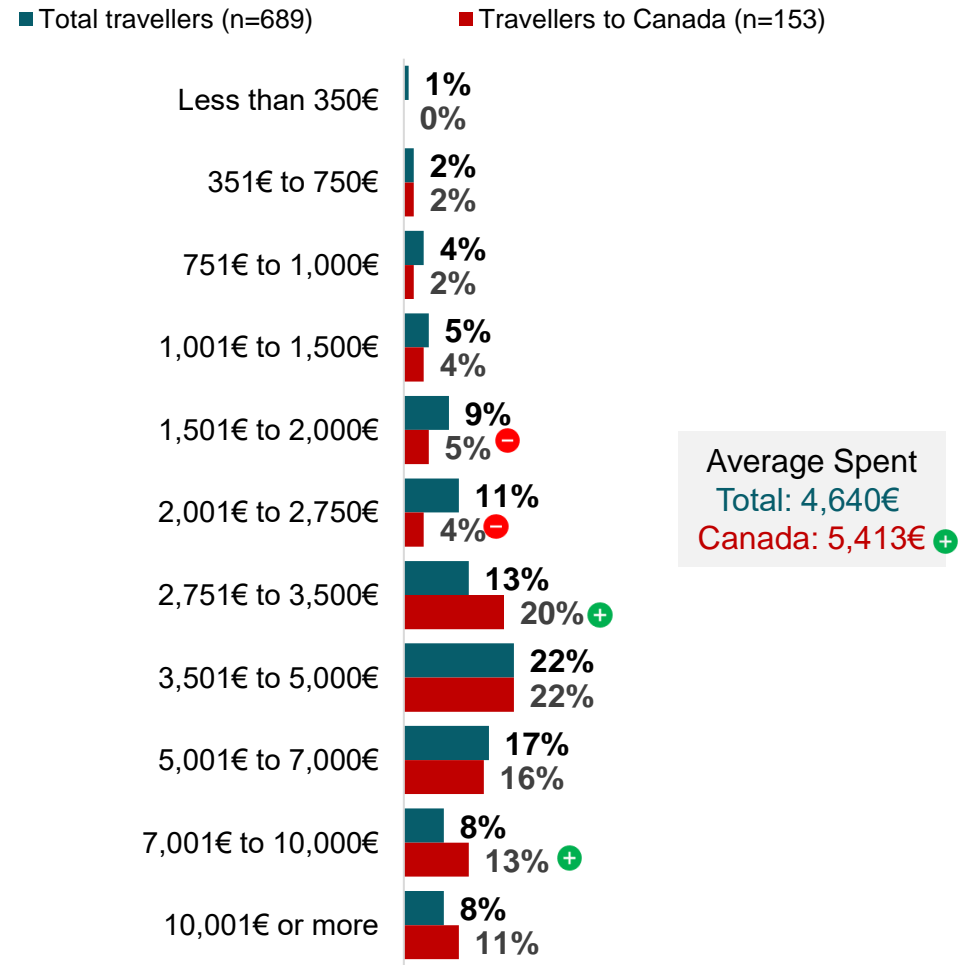


# Amount Spent for Recent Trip

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

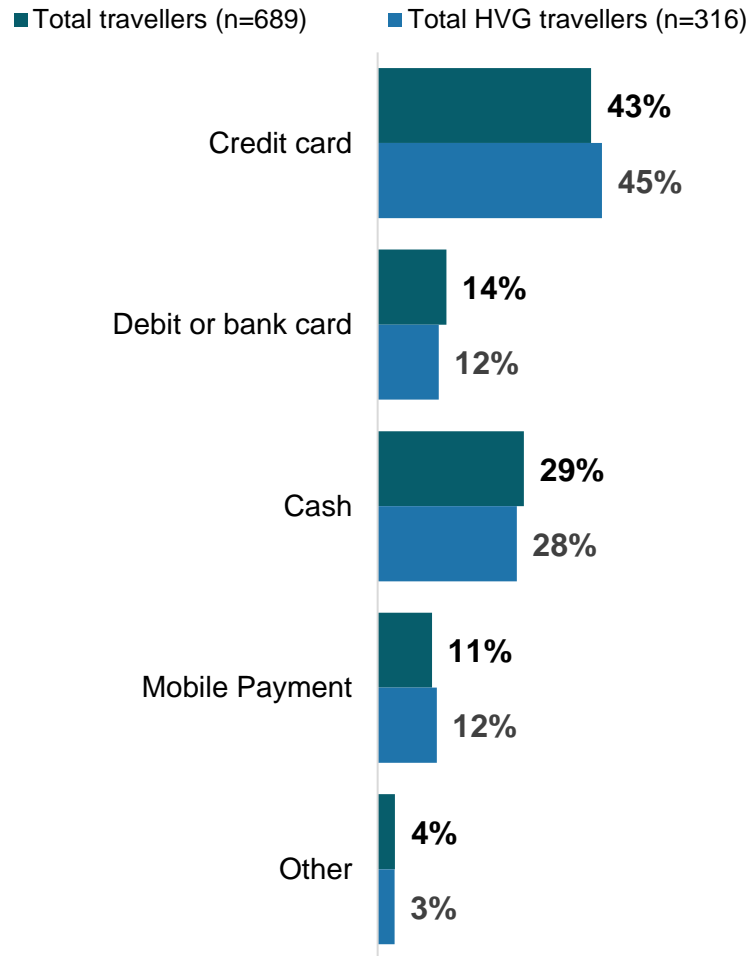


**Total Travellers to Any Destination vs. Total Travellers to Canada**

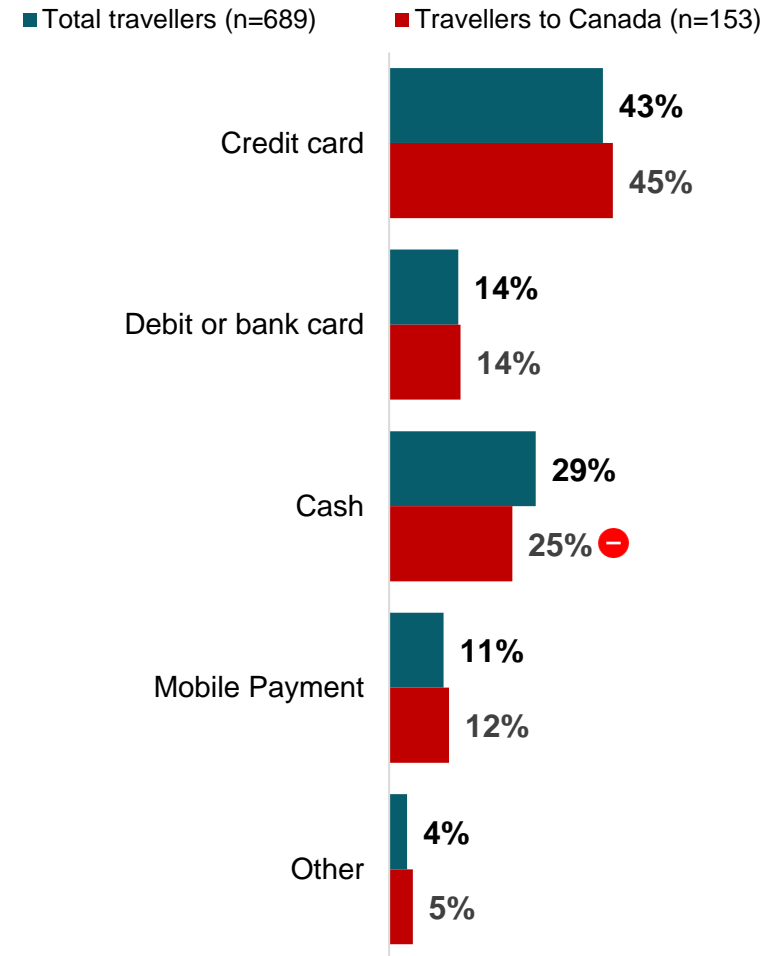


# Payment Methods for Recent Trip

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



**Total Travellers to Any Destination vs. Total Travellers to Canada**

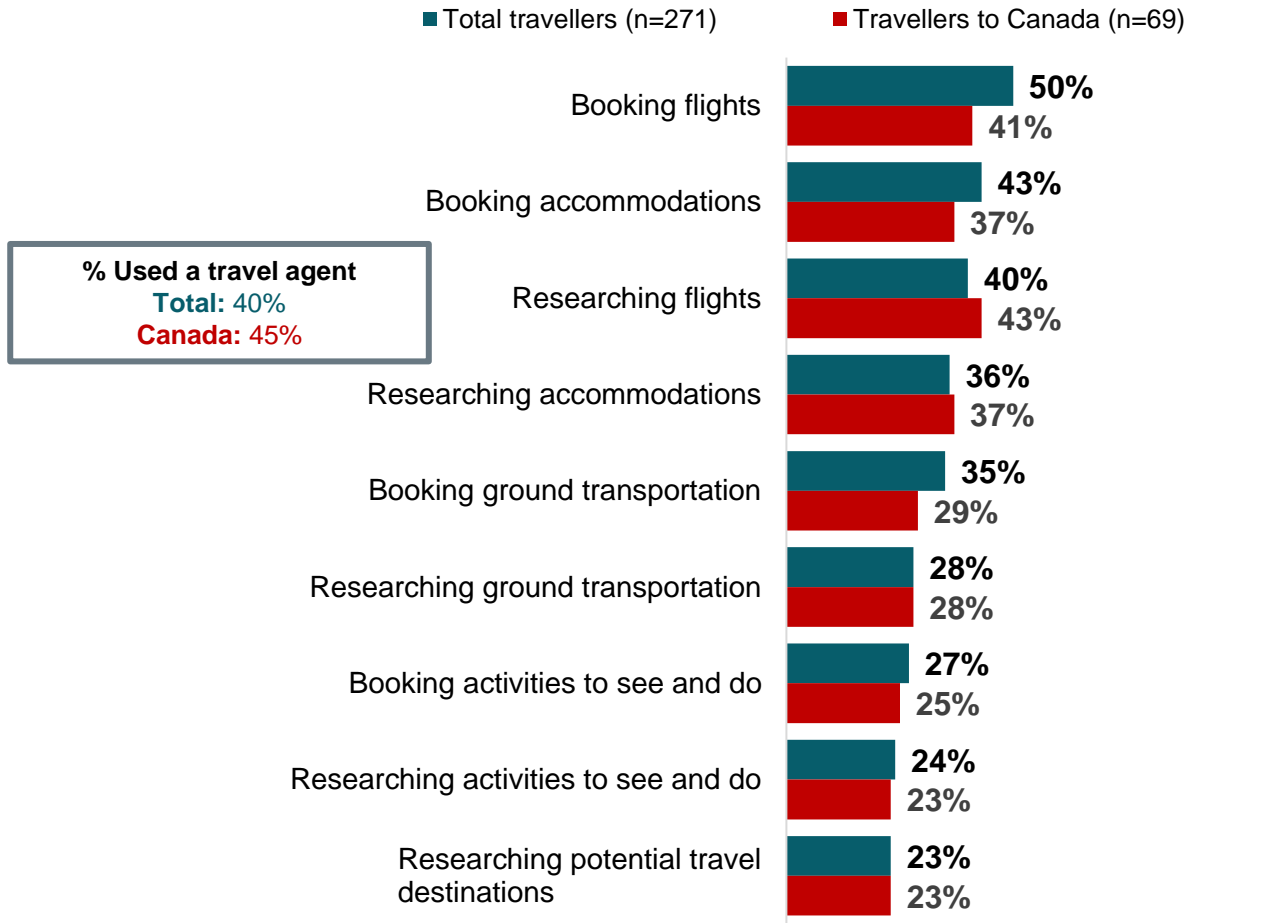
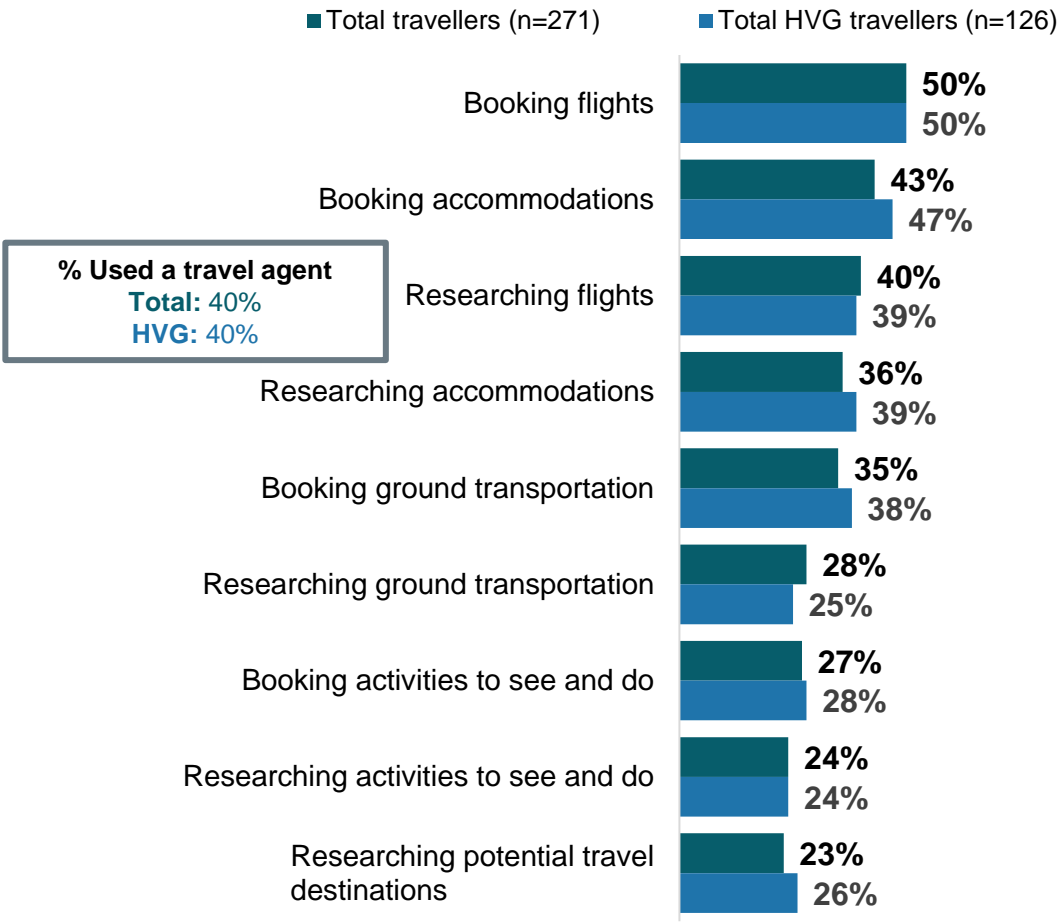


# Travel Agents/Tour Operator Usage For Recent Trip



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

**Total Travellers to Any Destination vs. Total Travellers to Canada**



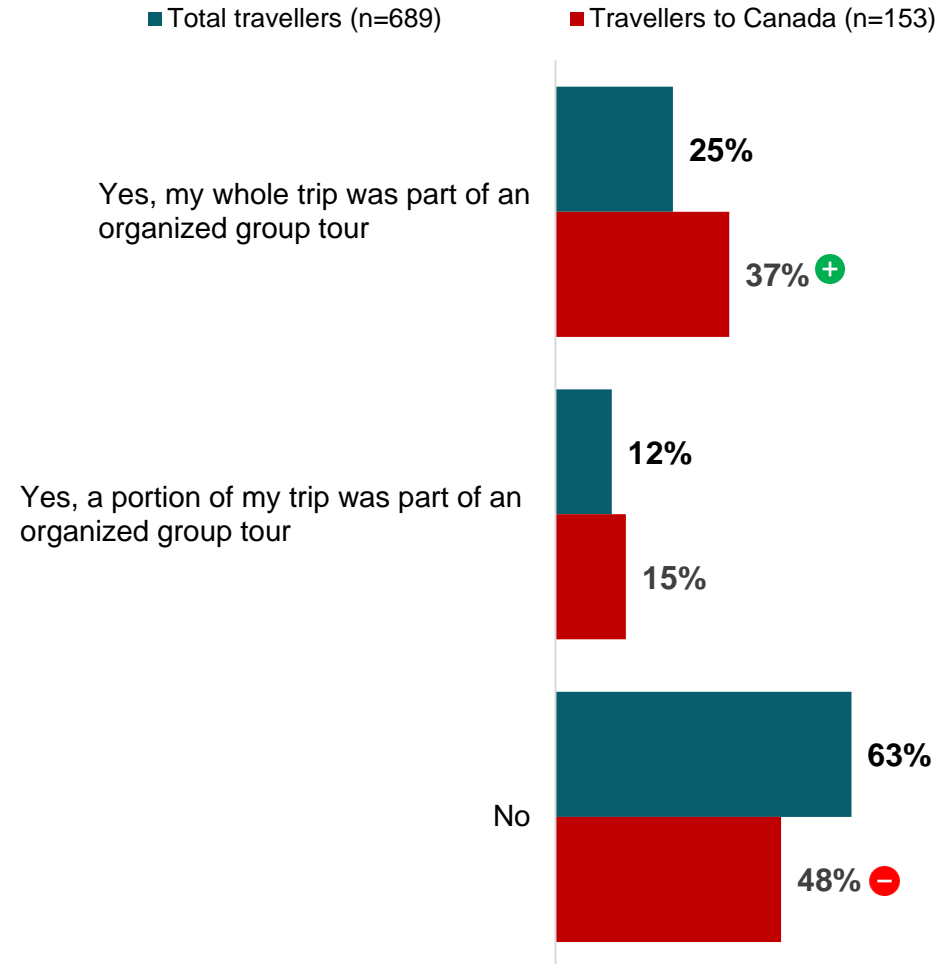
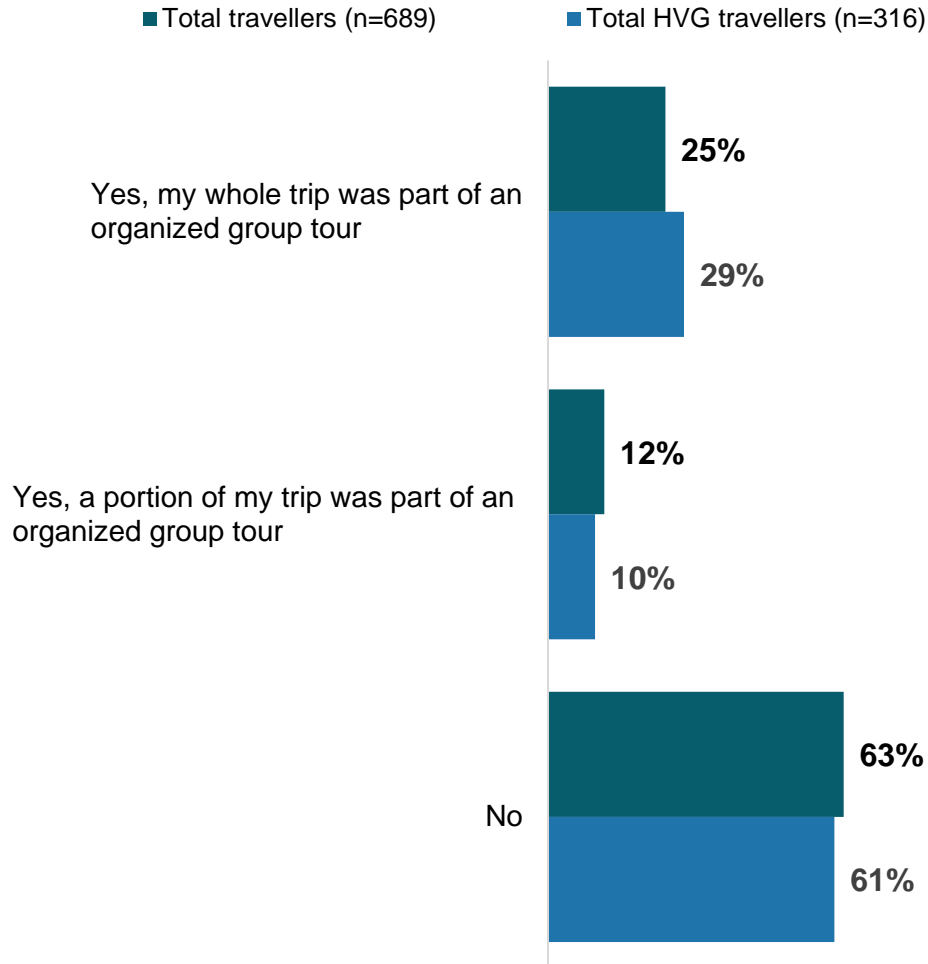
Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination, Used a Travel Agent/Tour Operator (n=271); HVG (n=126); Travellers to Canada (n=69)  
 F9. Travel agents offer personalized service to help individuals, groups, and business travellers plan and organize 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?



# Organized Group Tour Usage For Recent Trip

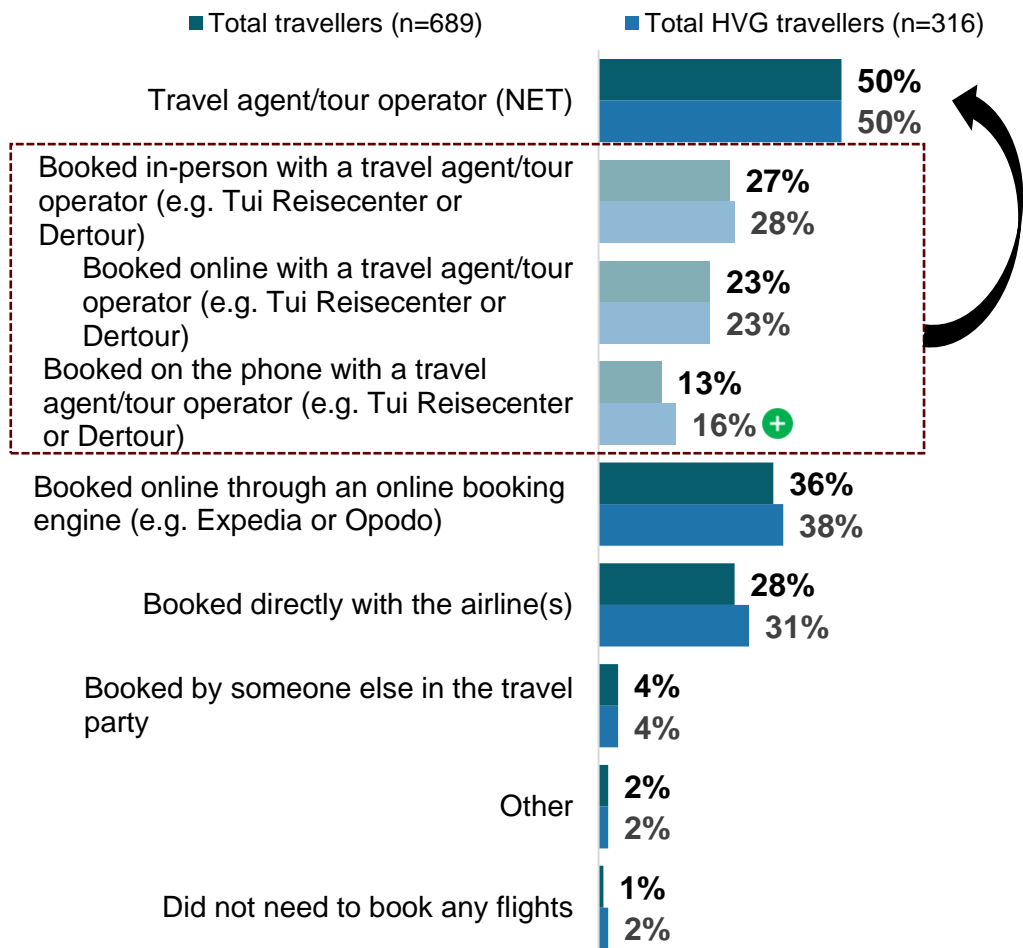
**Total Travellers to Any Destination vs. HVG Travellers to Any Destination**

**Total Travellers to Any Destination vs. Total Travellers to Canada**

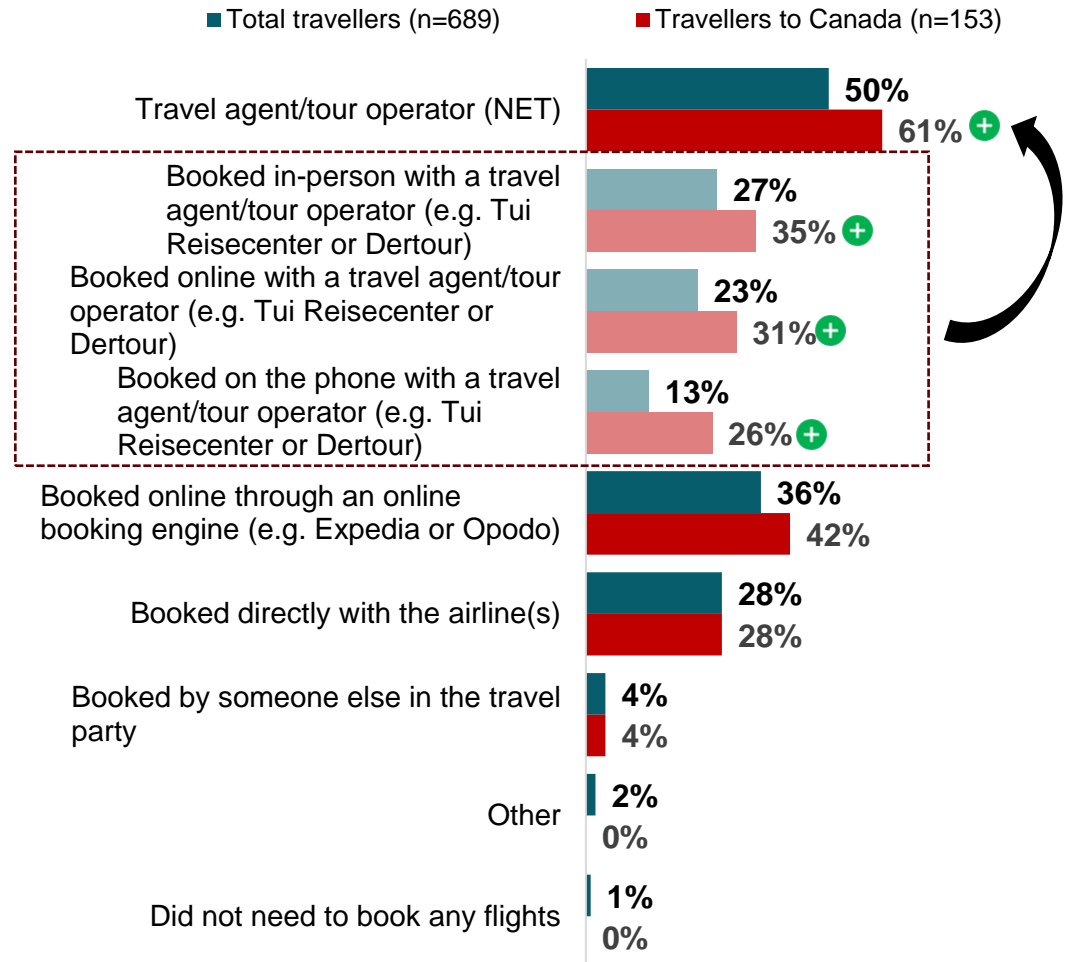


# Booking Flights For Recent Trip

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



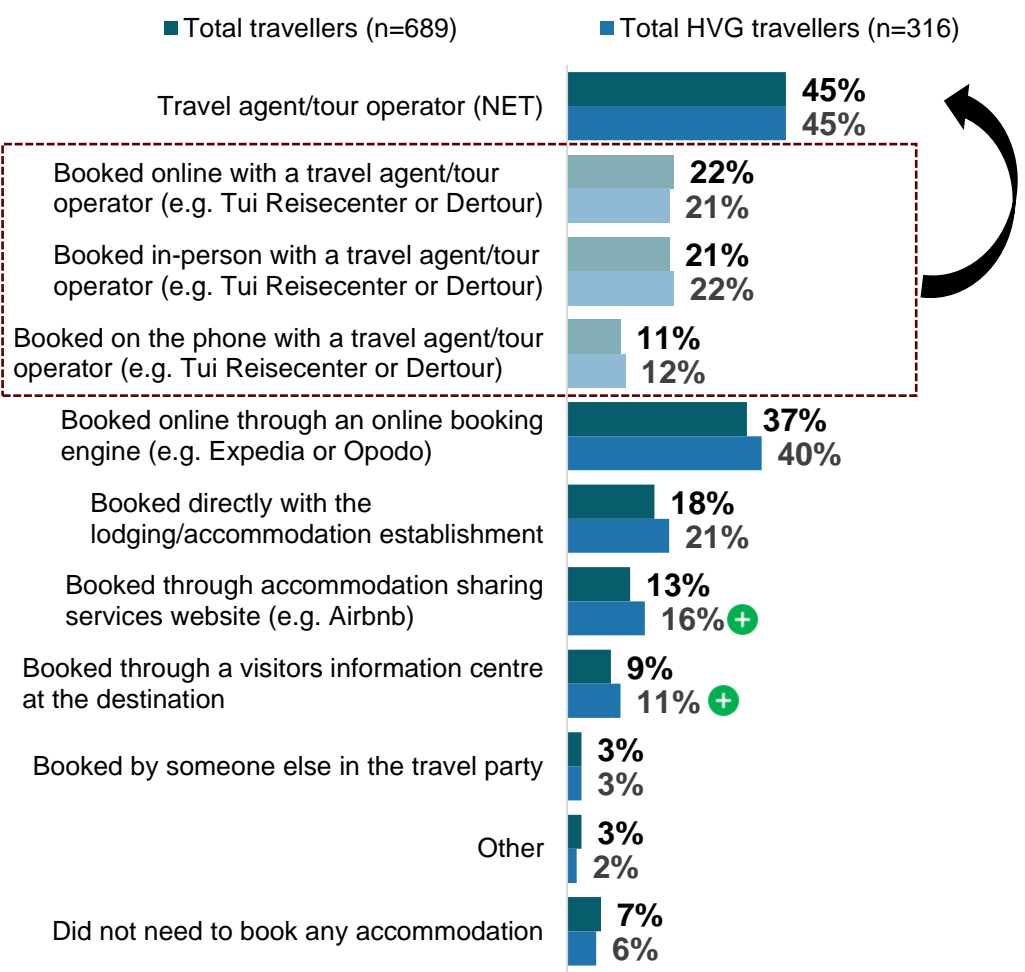
**Total Travellers to Any Destination vs. Total Travellers to Canada**



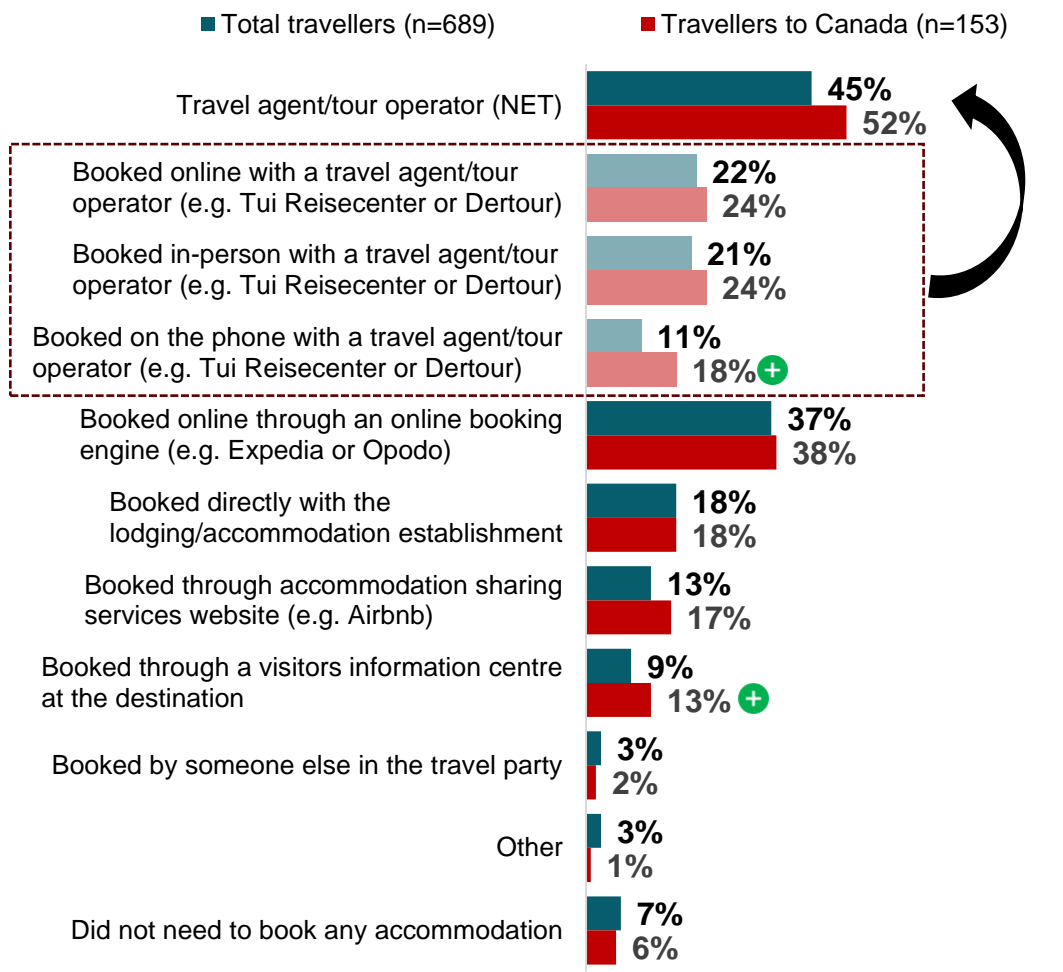


# Booking Accommodations For Recent Trip

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



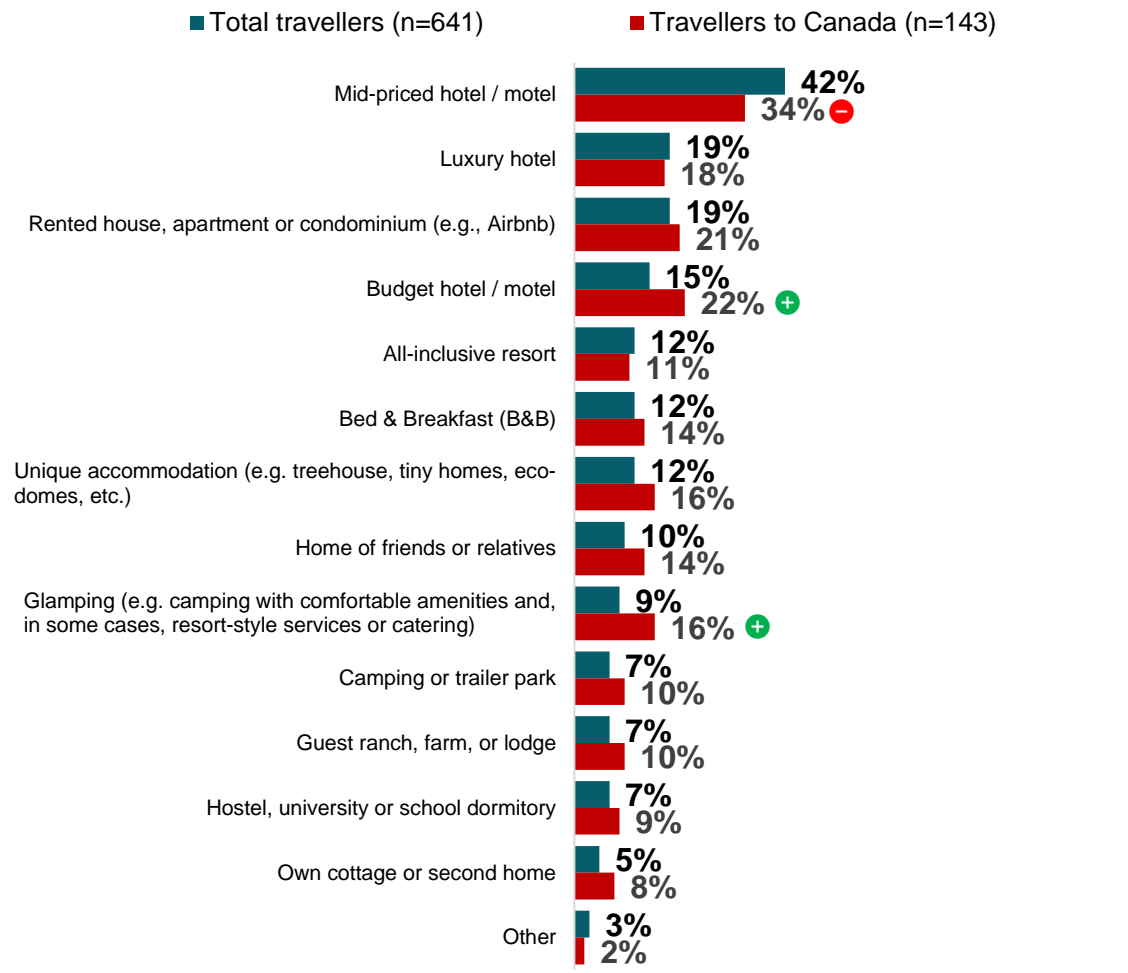
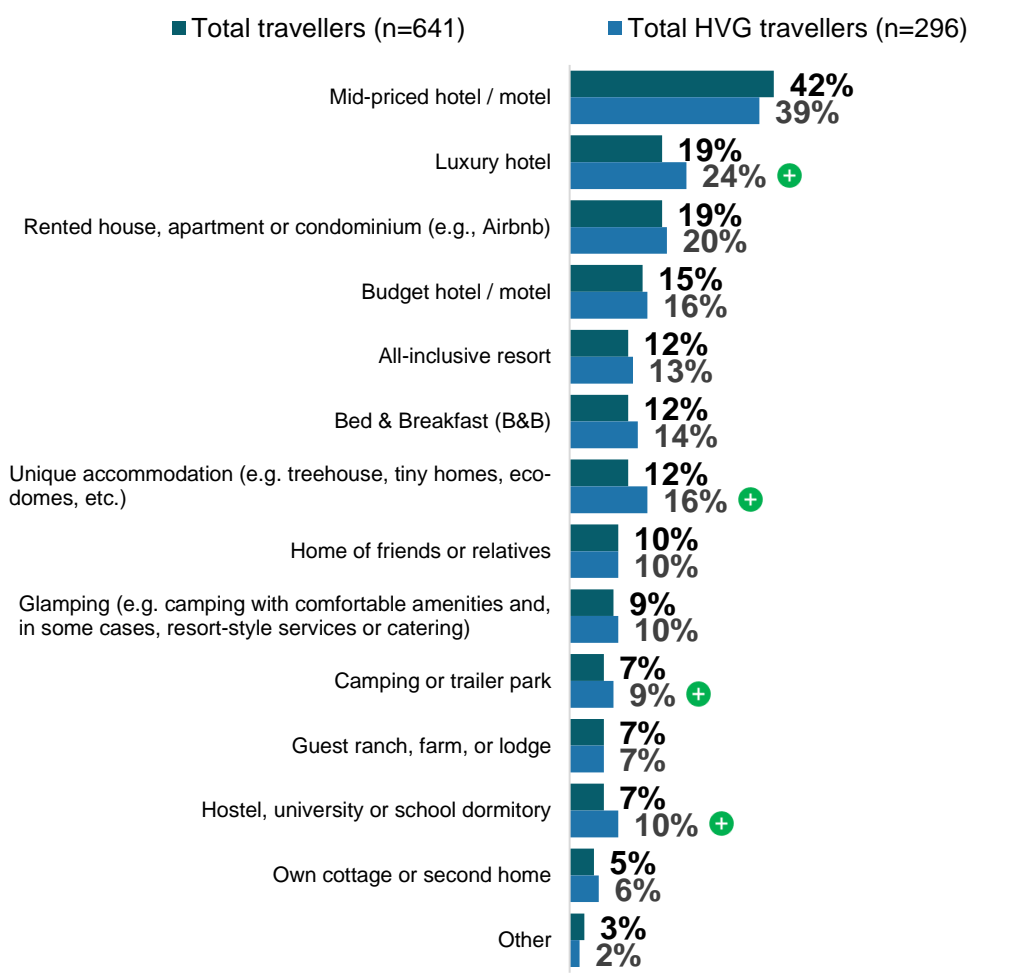
**Total Travellers to Any Destination vs. Total Travellers to Canada**



# Type of Accommodations For Recent Trip

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

**Total Travellers to Any Destination vs. Total Travellers to Canada**

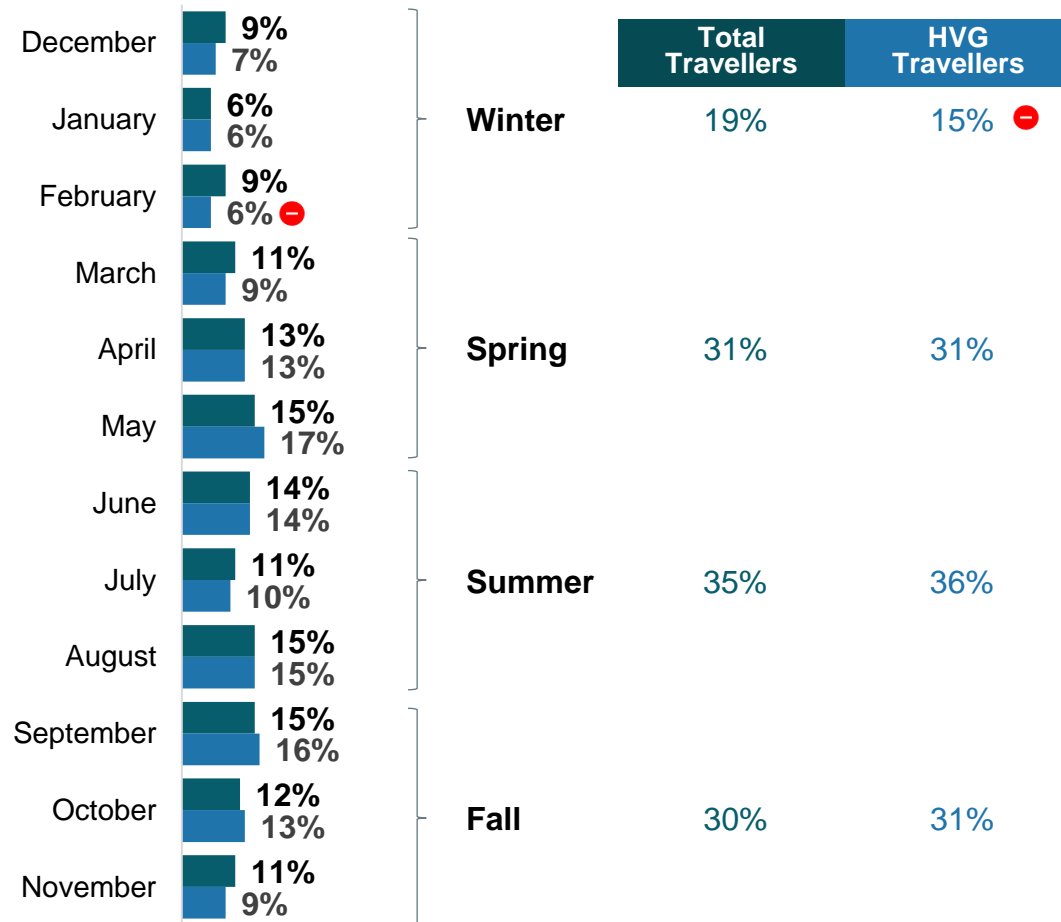


78 Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination, Booked Accommodation (n=641); HVG (n=296); Travellers to Canada (n=143)  
 F14. Which type of accommodation did you stay in during this trip? (Select all that apply)

# Time of Year Travelled For Recent Trip

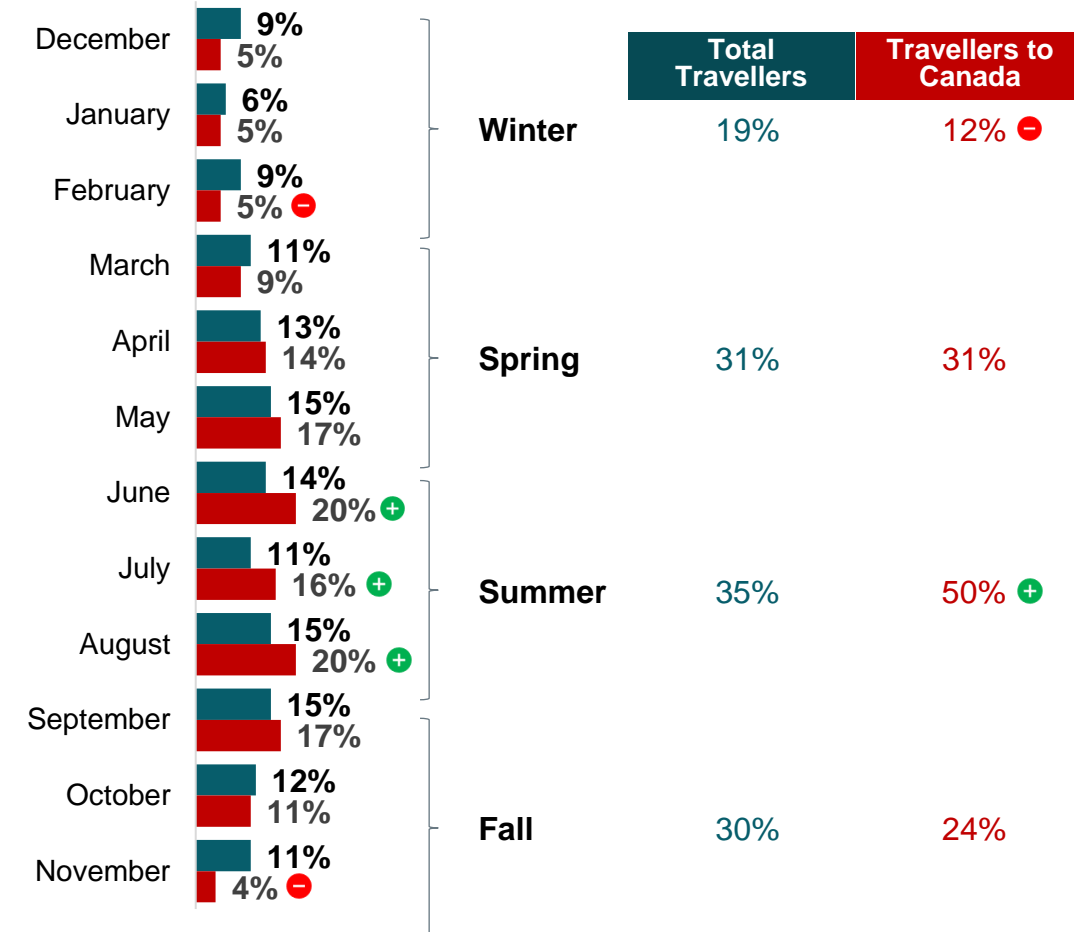
**Total Travellers to Any Destination vs. HVG Travellers to Any Destination**

■ Total travellers (n=689) ■ Total HVG travellers (n=316)



**Total Travellers to Any Destination vs. Total Travellers to Canada**

■ Total travellers (n=689) ■ Travellers to Canada (n=153)





# Most Recent Trip to Canada



 Niagara Falls  
Ontario



# Top 10 Activities Participated in During Recent Trip to Canada



Total Travellers (n=153)	Total HVG Travellers (n=94)
Nature walks	Hiking
Hiking	Nature walks
Natural attractions (e.g. scenic viewpoints, mountains, waterfalls)	Natural attractions (e.g. scenic viewpoints, mountains, waterfalls)
Nature parks	Nature parks
Local markets (e.g. public markets, farmers market, night markets)	Trying local food and drink
Trying local food and drink	Shopping for items that help me remember my trip
Oceanside beaches	Local markets (e.g. public markets, farmers market, night markets)
Fine dining	Shopping for clothes and shoes
City green spaces like parks or gardens	City green spaces like parks or gardens
Shopping for items that help me remember my trip	Oceanside beaches

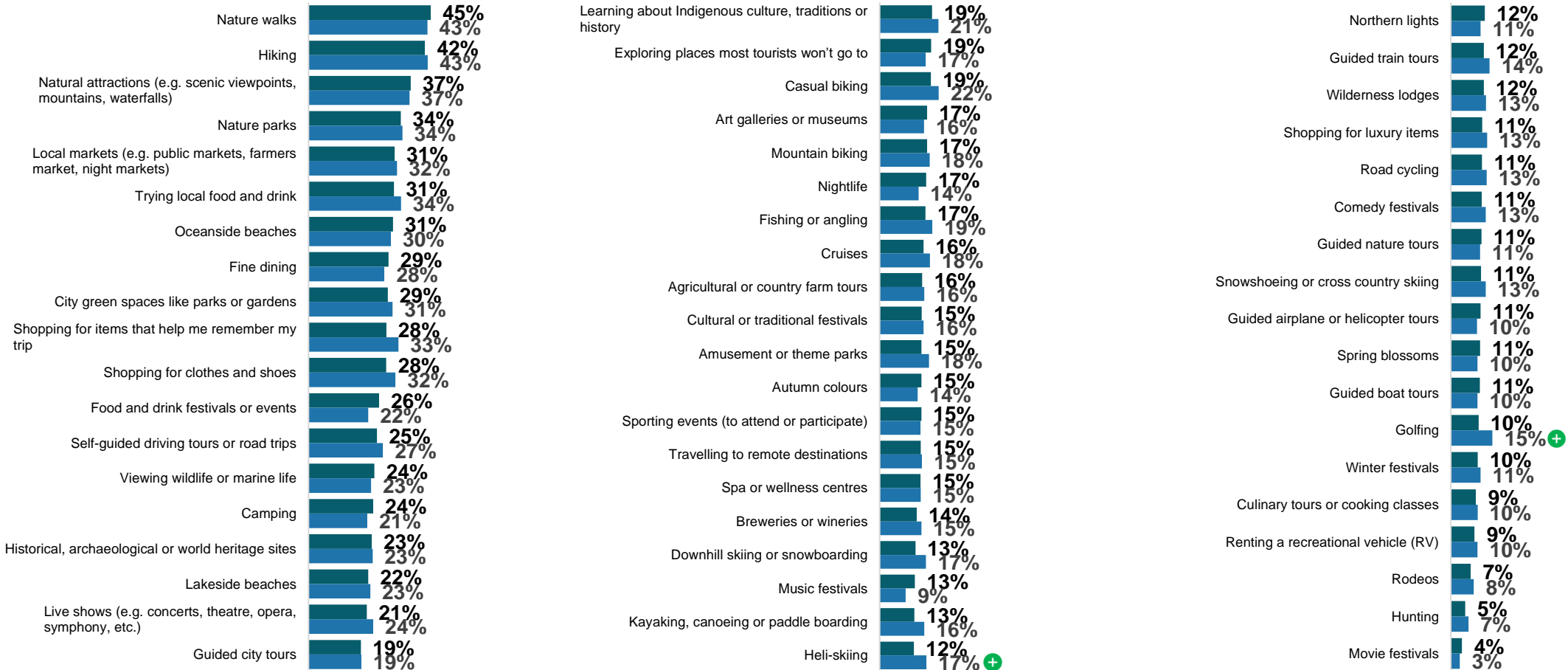




# Activities Participated in During Recent Trip to Canada



■ Total Travellers ■ Total HVG Travellers



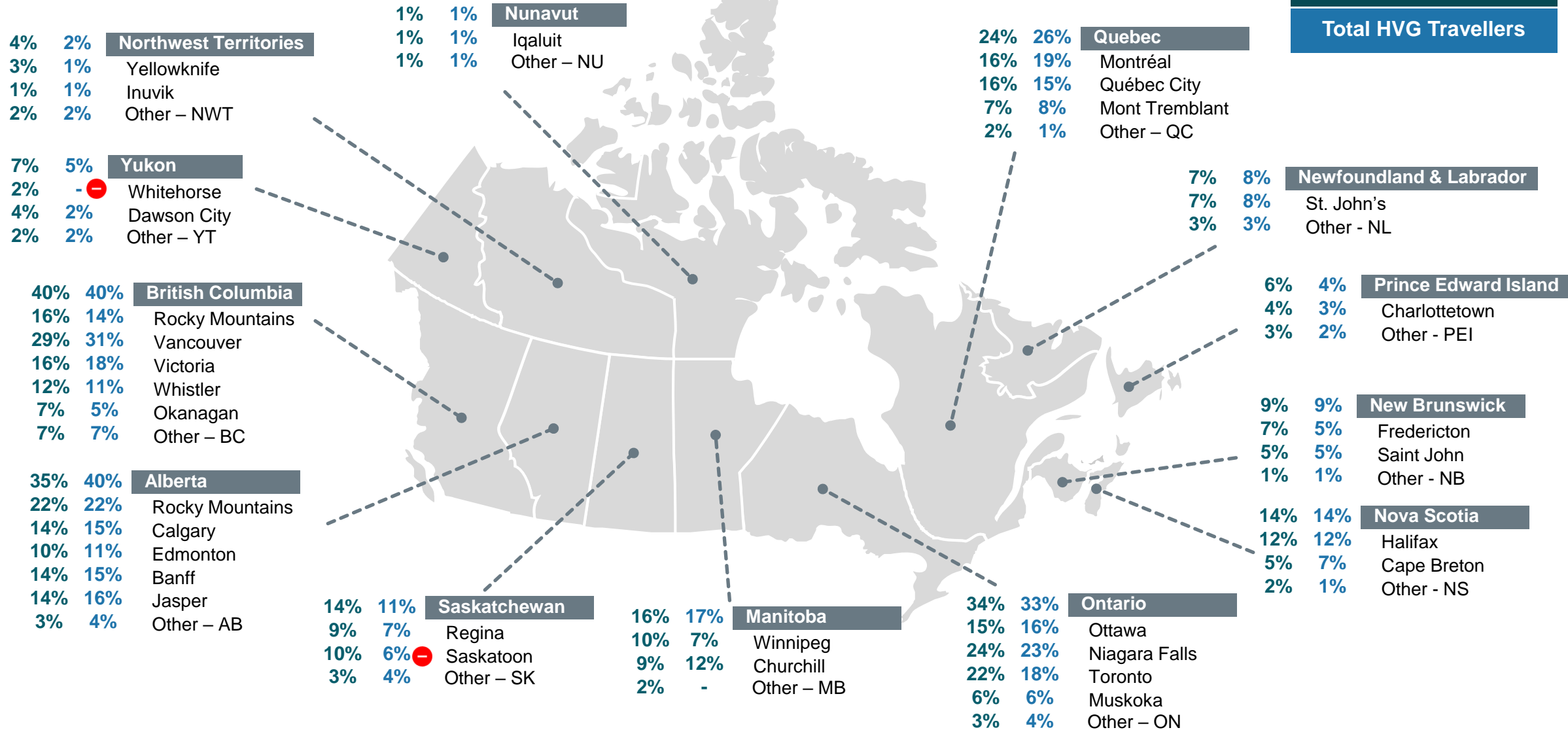


# Canadian Destinations Visited During Recent Trip



Total Travellers

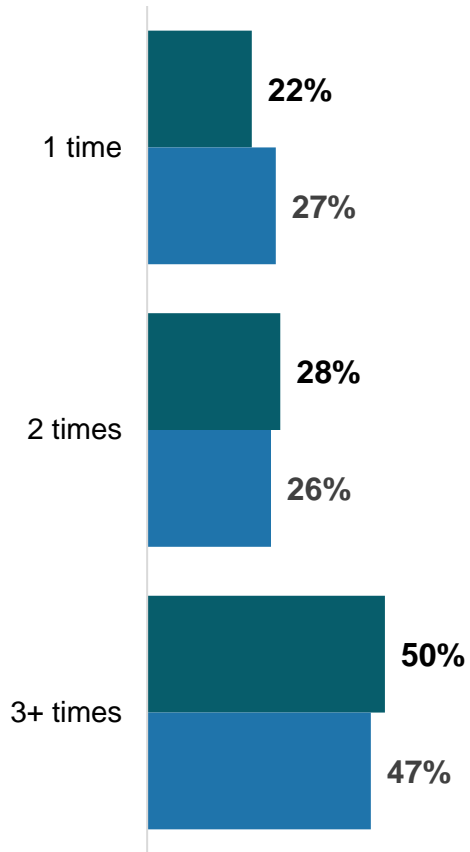
Total HVG Travellers



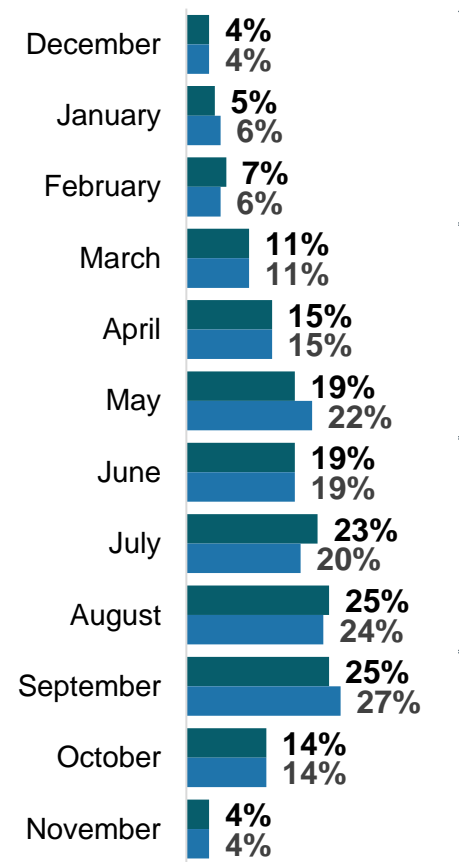
# Number of Visits Ever & Time of Year Visited Canada



■ Total Travellers ■ Total HVG Travellers



■ Total Travellers ■ Total HVG Travellers



	Total Travellers	Total HVG Travellers
<b>Winter</b>	13%	13%
<b>Spring</b>	37%	39%
<b>Summer</b>	48%	45%
<b>Fall</b>	33%	35%



# Demographics

	All Long-haul Travellers (n=1518)	HVG Audience (n=456)
<b>Gender</b>		
Male	52%	60% <span style="color: green;">+</span>
Female	48%	40% <span style="color: red;">-</span>
<b>Age</b>		
18 to 34	38%	33% <span style="color: red;">-</span>
35 to 54	34%	40% <span style="color: green;">+</span>
55 or older	28%	27%
<b>Children in household under the age of 18</b>		
Yes	45%	55% <span style="color: green;">+</span>
<b>Employed</b>		
Yes	75%	82% <span style="color: green;">+</span>
<b>Identify as LGBTQ+</b>		
Yes	10%	14% <span style="color: green;">+</span>
<b>Household Income (Monthly)</b>		
Under 1,000€	3%	- <span style="color: red;">-</span>
1,000€ to 3,000€	30%	6% <span style="color: red;">-</span>
3,000€ or more	53%	92% <span style="color: green;">+</span>



# THANK YOU

For any questions, please reach out to [research@destinationcanada.com](mailto:research@destinationcanada.com)



CANADIAN TOURISM DATA  
**collective**