- CONFIDENTIAL

2023 GLOBAL TRAVELLER RESEARCH PROGRAM

TOPLINE REPORT TOTAL GERMANY VS. HIGH VALUE GUEST AUDIENCE





Table of Contents

Study Overview	3
Market Sizing	4
Key Performance Indicators	10
Market Outlook	13
Canada vs. Competitors	18
Travel Intentions to Canada	38
Travel Behaviours	43
Seasonal Travel	53
Indigenous Tourism	63
Most Recent Trip	67
Most Recent Trip to <u>Canada</u>	80



Germany GTRP – December 2023

Kananaskis Country

Alberta

0

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.

<u>HVG Audience Definition</u>: 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.



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.

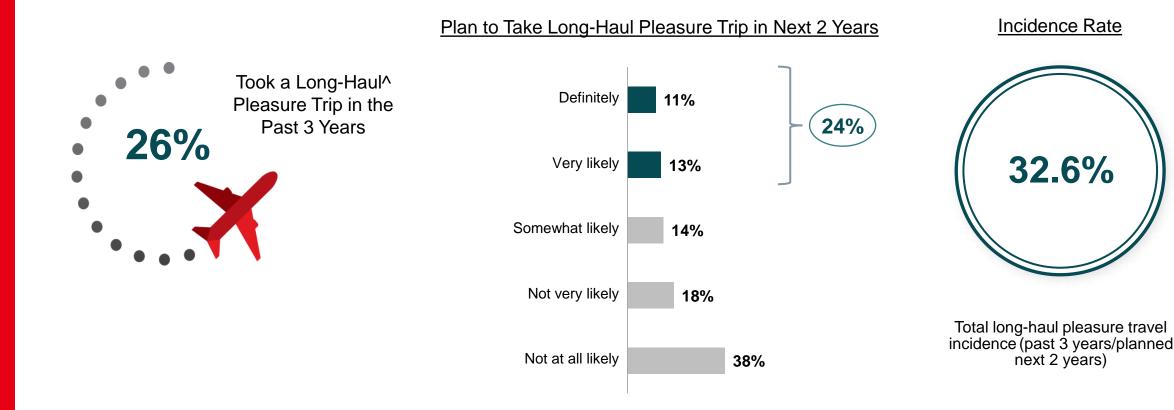


Market Sizing



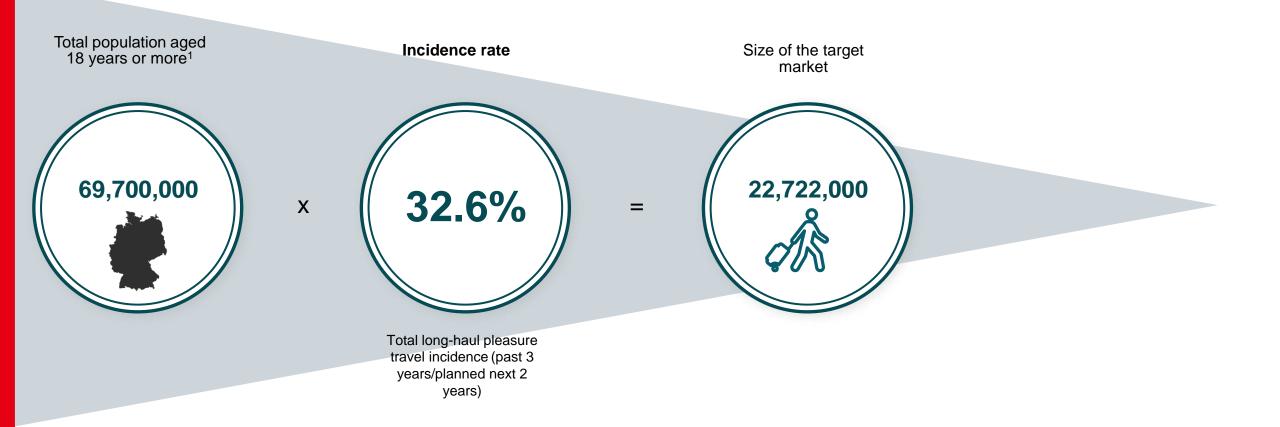
Incidence of Long-Haul Pleasure Travel (General Population)





Long-Haul Pleasure Traveller Sizing





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

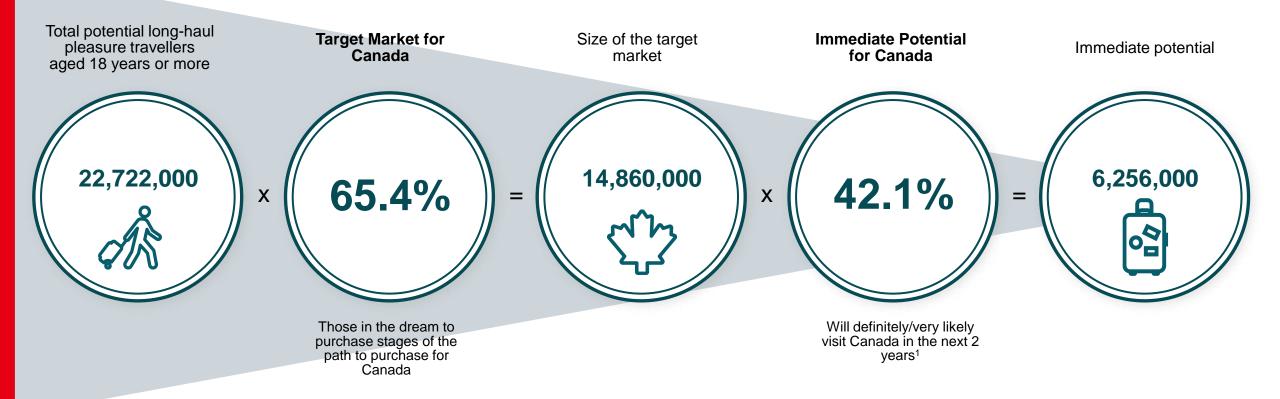
Germany GTRP – December 2023

Potential Market Size For Canada



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

7



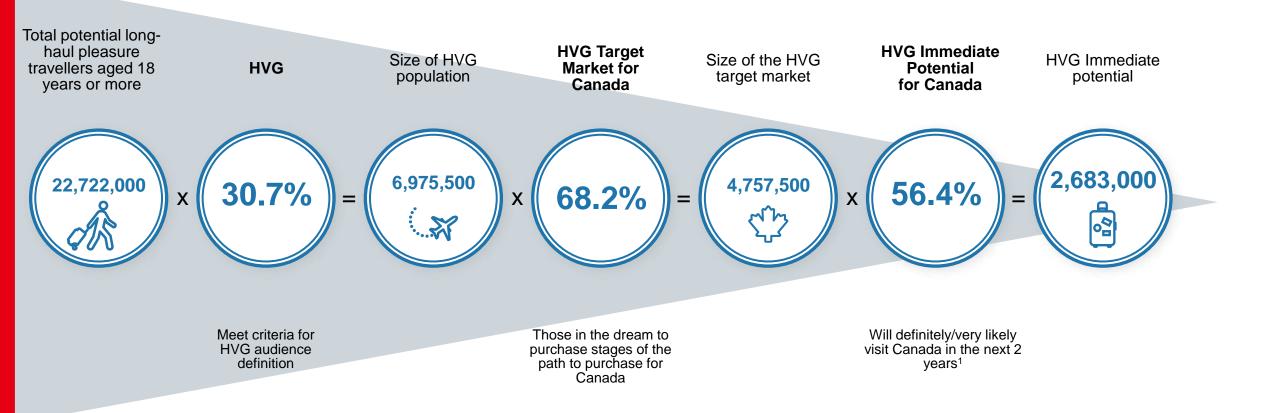
¹ Includes respondents likely to visit Canada for a trip of 1 to 3 nights, or a trip of 4 nights or more. Base: Target market for Canada = long-haul pleasure travellers (past 3 years or next 2 years) (n=1518); Immediate potential for Canada = dream to purchase stages for P2P for Canada (n=992)

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



¹ 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)

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)

8

Potential Market Size for the Regions



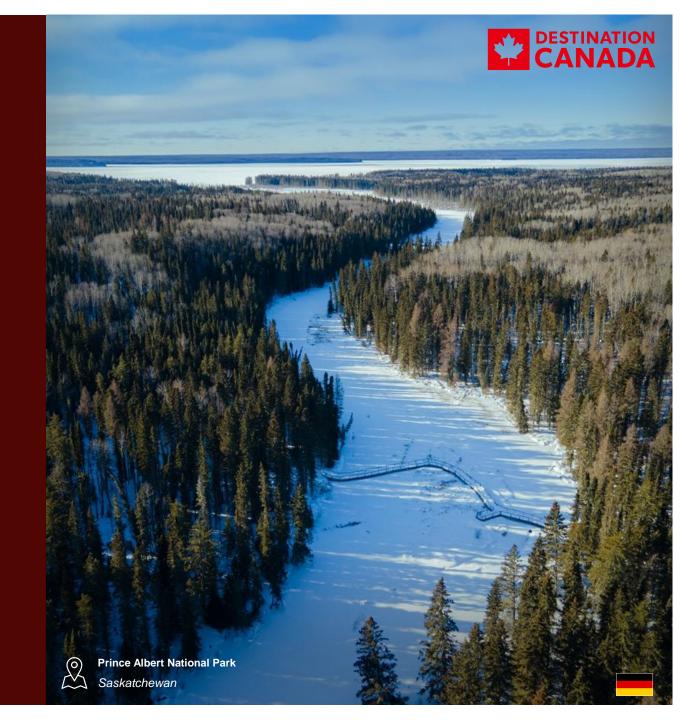
Total Germany Immediate Potential for Canada: HVG Audience Total Germany: 6,256,000 **HVG Audience:** 2,683,000 Key: % likely to visit region Immediate potential (000s) YΤ 17.8% 20.4% NU NWT 1,113 548 NL 11.8% 12.7% 5.1% 5.3% 15.7% 18.4% 739 341 319 142 982 494 PEI 10.9% 14.2% MB BC AB 381 **682** 13.1% 16.8% 54.5% 58.6% 39.2% 39.4% QC 820 451 3,410 1,572 2,453 1,057 38.4% 42.1% NB 2,403 1,130 SK ON 8.2% 10.4% 12.3% 17.7% 513 279 52.5% 48.6% 770 475 NS 3,284 1,304 14.3% 15.5% 895 416

Base: Those in the dream to purchase stages of the path to purchase for Canada and definitely/very likely to take a trip to Canada (n=992); HVG (n=311) E2. If you were to take a holiday trip to Canada, in the next 2 years, which of the following Canadian provinces or territories are you likely to visit? (Select all that apply)

9



Key Performance Indicators



Key Performance Indicators



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

¹ For trips in the next 2 years.

nights long?

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

11

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 ¹	10%	16% 🕁
Aided destination consideration for <u>fall</u>	% consider Canada for the months of September, October and/or November ²	51%	57% 🕁
Unaided <u>winter</u> destination	% who mentioned Canada or a destination in Canada ¹	9%	10%
Aided destination consideration for winter	% consider Canada for the months of December, January and/or February ²	23%	29% 🕁
Unaided Indigenous Tourism destination	% who mentioned Canada or a destination in Canada	7%	6%

¹Among respondents who answered about winter/fall travel
²Among 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



Market Outlook



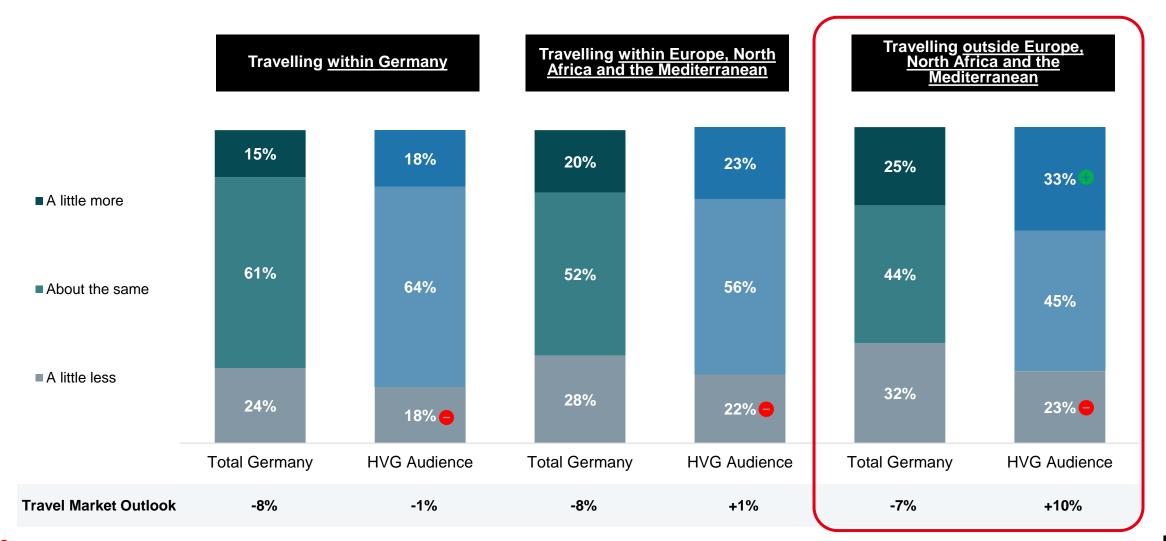
Indicator	Definition	All Long-haul Travellers (n=1518)	HVG Audience (n=456)
Incidence of long-haul pleasure travel	% who have taken a long-haul pleasure trip in the past 3 years	79%	100% 🔁
Long-haul travel intentions	% who plan ¹ to take a long-haul pleasure trip in the next 2 years	75%	100% 😏
Market Outlook (Net change in long-haul travel)	% 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>	-7%	+10%

¹Who 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)
14 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 spent at least 1 night in paid accommodations? (Select one only)
14 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)
14 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)





15

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1518); HVG (n=456) A5. How would you describe your spending intentions on the following items in the next 12 months compared to the last 12 months? Will you spend...

Germany GTRP - December 2023

Types of Travel Trips



	Total Germany	HVG Audience
Sometimes (once every 2 years) Regu	larly (once a year) ■ Often (several times a year) ■ Very often (about once a month or more) At least every 2 years
Domestic holiday trips (within my home country)	10% 24% 35% 4% 72%	10% 25% 39% 🕂 <mark>7%</mark> 81% 🕂
International holiday trips (outside my home country)	12% 39% 26% 78%	9% <mark>- 39% 39% • 4</mark> % 92% +
Business trips and meetings (outside my home country)	6%9% 9% 26%	7% 13% 16% 5% 41% +
Trips to attend business conferences or events (outside my home country)	6%9%7% 23%	7% 13% 15% 37% +
Added personal holiday days to a business trip	7%10%10% 28%	8% 15% 16% 49 42% +
Holiday trips where I choose to also work remotely from my destination	6%8%7% 23%	7% 14% 11%5% 37% +

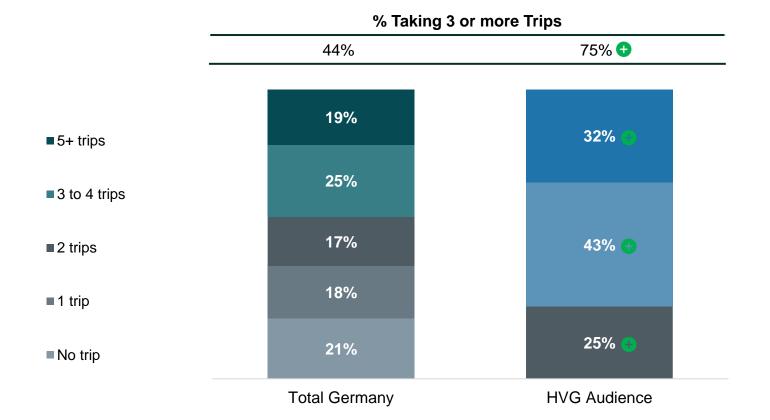
Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1518); HVG (n=456) A6. How often do you typically travel on each of the following types of trips?

16

Germany GTRP – December 2023

Long-Haul Travel Intensity





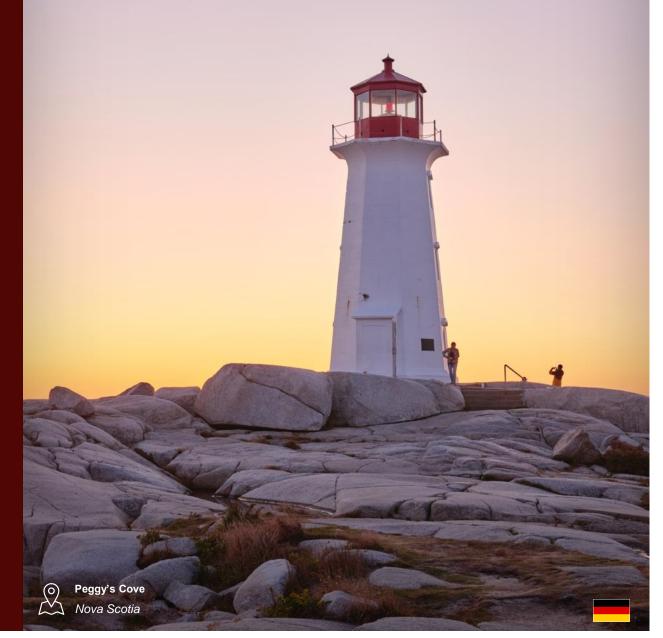
Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1518); HVG (n=456) A8. How many holiday trips have you taken in the past 3 years?

17

Germany GTRP – December 2023



Canada vs. Competitors



Past Visitation

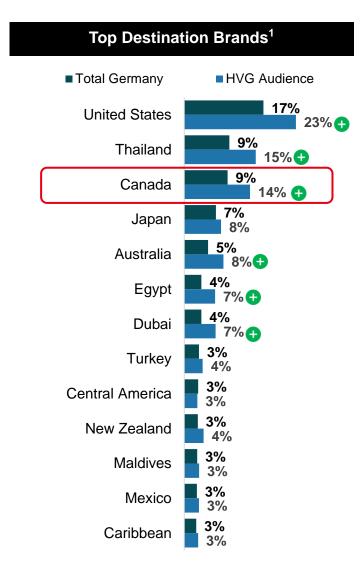


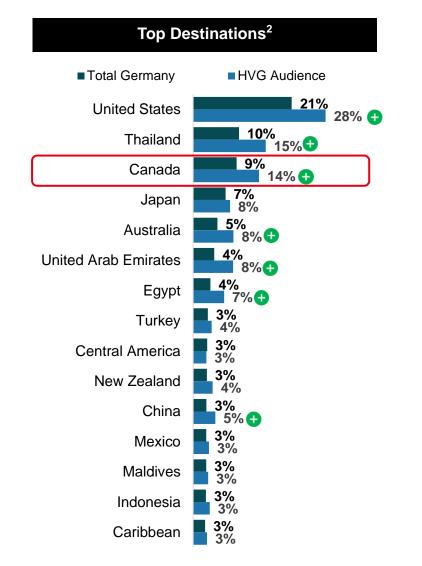
	Total Germany		HVG Aι	ıdience
Visited more	than 3 years ago Visited in the past	3 years Ever visit		
United States	34% 21% 55%		37%	35% 73% 🕂
Canada	22% 10% 32%		29% 🕀 219	50%€
Thailand	22% 10% 32%		30% 🛨 16%	46% 🛨
United Arab Emirates	19% 11% <i>30%</i>		25% 🛨 19%	44% <table-cell-rows></table-cell-rows>
Mexico	19% 6% 24%		27% 🕒 11%	38%+
Australia	15% 7% 22%		23% 🕂 13% 3	6% 🛨
South Africa	15% 6% 22%		23% + 9% 32	% +
Iceland	14% 6% 21%		18% 12% 30%	6 🕀
Japan	12%6% 18%		20% <mark>+</mark> 10% <mark>+}0</mark> %	6 🕀
China	13%4 <mark>%</mark> 17%		19% <mark>8%</mark> 27%	•
India	13% <mark>4</mark> % <i>16%</i>		19% 5% 24%	Ð
Other	29% 24% 52%		25% 🗧 32	% 😑 57% 🛨

19 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?

Unaided Long-Haul Destination Consideration (Next 2 Years)







¹Responses as mentioned by respondents (e.g., percentage who said "Canada" specifically). ²Roll-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) 20

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



	% NET Active Planning (top 4 box)			
	13%	19% 🛨		
Have already booked my transportation and accommodations	3%	33%		
Am currently making transportation and accommodation arrangements	7% 13%	5% (+) 9%		
Am planning the itinerary for a trip to this country	1370	16% 😛		
Have started to gather some travel information for a trip to this country	39%			
Seriously considering visiting / returning in the next 2 years		33% 😑		
Dreaming about visiting / returning someday	15%			
Not interested in visiting / returning in the foreseeable future		18% 🕒		
Have never thought of taking a trip to this destination	19%	13% 😑		
	Total Germany	HVG Audience		

HVG Audience

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) 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) 21

Stage in the Purchase Cycle: Total Germany



									NET Active Planning (Top 4 box)
	United States (n=456)	12% 1	8%		29%	23%	7%	5% 3%4%	19%
	Canada (n=1518)	19%	15%		39	9%	13%	7% 3%	13%
Have never thought of taking a trip to this destination	Iceland (n=455)	26%		17%		35%	11%	8%	12%
Not interested in visiting / returning in the foreseeable future	Thailand (n=456)	22%		25%		28%	12%	6% <mark>3%</mark>	12%
Dreaming about visiting / returning someday	Australia (n=456)	22%	17	%		41%	10%	6%	10%
Seriously considering visiting / returning in the next 2 years	United Arab Emirates (n=456)	28%		2	7%	22%	13%	4% <mark>3%</mark> 8%	10%
Have started to gather some travel information for a trip to this country	Mexico (n=455)	25%		21%		33%	12%	6%	9%
Am planning the itinerary for a trip to this	South Africa (n=455)	25%		24%		31%	10%	6 5%	9%
CountryAm currently making transportation and	China (n=455)	33%			29%	24	1%	6% 3% <mark>3%</mark>	8%
accommodation arrangements Have already booked my transportation	India (n=456)	379	%		29%		23%	6%	6%
and accommodations	Japan (n=455)	33%		14%	6	36%	12	% 4%	6%

22 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] 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)

Stage in the Purchase Cycle: Among HVG Audience



							NET Active Planning (Top 4 box)
	United States (n=125)	7% <mark>-</mark> 199	%	27%	22%	9% 6% <mark>3%</mark>	6% 25% +
	Canada (n=456)	13% 😑	18% 😷	33% 😑	1	6% 🕂 9% 5% 3	<mark>%3%</mark> + 19%+
Have never thought of taking a trip to this destination	Iceland (n=130)	14% 😑	20%	35%		13% 12% 4%	18%+
Not interested in visiting / returning in the foreseeable future	Thailand (n=129)	14% 😑	23%	25%	20	0% 🛨 6% 5%	6% <mark>+</mark> 19% +
Dreaming about visiting / returning someday	Australia (n=162)	19%	17%	36%		15% 🛨 9% 3	14%
Seriously considering visiting / returning in the next 2 years	United Arab Emirates (n=141)	18% 😑	28%	2	23%	16% 6% 3%	5% 14%
Have started to gather some travel information for a trip to this country	Mexico (n=143)	15% 😑	21%	28%		20% 🕂 12% 🕇	16% 🕈
Am planning the itinerary for a trip to this	South Africa (n=144)	18% 😑	24%	:	32%	15% 🕂 7%	11%
 Am currently making transportation and 	China (n=133)	26%		29%	24%	7% 7% ⁺ 4%	14% 🛨
accommodation arrangementsHave already booked my transportation	India (n=133)	3	8%	28%		20% 8% 4%	7%
and accommodations	Japan (n=128)	32%	6	13%	27% 😑	17% 🔒 8%	● 11% ●

23 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] 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)

Destination Consideration (Next 2 Years)



Total Germany HVG Audience 4 5 - I am seriously considering 4 or 5 (out of 5) United States 20% 31% 51% 17% 42% 59% 🔂 Canada 24% 23% 47% 26% 29% 56% Iceland 21% 17% 38% 23% 19% 42% 🗗 45% 🔂 21% 16% 36% 24% 21% Australia 36% Japan 19% 17% 23% 19% 41% 🔂 36% 41% 🔂 Thailand 17% 19% 18% 24% South Africa 17% 13% 30% 17% 37% 🔂 20% 16% 14% 38% 🔂 United Arab Emirates 30% 19% 20% 17% 10% 27% 21% 13% 34% 🗗 Mexico (+)China 12%6% 18% 22% 🗗 14% 9% 18% 23% 🔂 India 10%7% 14% 9%

24 Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1518); HVG (n=456) 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'.

Destination Consideration By Seasons



Total Germany	Winter (Dec, Jan, Feb)	Spring (Mar, Apr, May)	Summer (Jun, Jul, Aug)	Fall (Sept, Oct, Nov)	HVG Audience	Winter (Dec, Jan, Feb)	Spring (Mar, Apr, May)	Summer (Jun, Jul, Aug)	Fall (Sept, Oct, Nov)
Australia (n=280)	43%	43%	29%	42%	Australia (n=105)	44%	43%	33%	40%
Canada (n=992)	23%	38%	56%	51%	Canada (n=311)	29% 🕁	43% 🛨	59%	57%🛨
China (n=173)	21%	47%	39%	38%	China (n=60)	25%	49%	50% 🛨	55%+
Iceland (n=261)	25%	38%	58%	40%	Iceland (n=85)	30%	43%	56%	40%
India (n=157)	34%	44%	34%	35%	India (n=46)	41%	33%	43%	28%
Japan (n=246)	21%	49%	37%	35%	Japan (n=71)	24%	55%	43%	33%
Mexico (n=247)	35%	46%	32%	39%	Mexico (n=92)	32%	49%	44% 🔂	38%
South Africa (n=232)	42%	41%	25%	45%	South Africa (n=83)	37%	42%	26%	48%
Thailand (n=238)	45%	42%	30%	43%	Thailand (n=81)	54% 🛨	50%	33%	48%
United Arab Emirates (n=207)	48%	49%	23%	48%	United Arab Emirates (n=75)	55%	52%	34% 🛨	60% +
United States (n=321)	31%	50%	53%	48%	United States (n=92)	42% 🕂	60%+	60%	51%

25 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 [DESTINATION] C7. For each of the following destinations, during which months would you consider taking a holiday trip in the next 2 years?

Germany GTRP – December 2023

Knowledge of Holiday Opportunities



Total Germany HVG Audience Very good Excellent Very good/Excellent United States (n=456) 18% 44% United States (n=125) 55% 26% 28% 27% Canada (n=1518) 12% 32% Canada (n=456) 21% 26% 20% 45% 🔂 9% 14% + 40% + Australia (n=456) 20% 29% Australia (n=162) 26% 19% 6% 11% 35%🖶 Thailand (n=456) 25% Thailand (n=129) 24% Iceland (n=455) 19% 5% 24% Iceland (n=130) 9% 38% 🔂 28% United Arab Emirates (n=456) 22% United Arab Emirates (n=141) 32% 🔂 15% 7% 23% 9% 14% 8% 21% 10% 29% Japan (n=455) Japan (n=128) 19% 14% 6% 10% 30% 🔂 South Africa (n=455) 19% South Africa (n=144) 20% Mexico (n=455) 12%4% 17% Mexico (n=143) 20% 7% 27%🖯 19% 🔂 China (n=455)10%3% 14% China (n=133) 13%6% India (n=456) 13% India (n=133) 12%4% 16% 9%4%

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

Destination Fit



	Total Germany		HVG Audience
	■8 ■9 ■10 - Exactly what	I'm looking for Top 3 box	
United States (n=456)	19% 12% 20% 51%	United States (n=125)	22% 14% 24% 60% +
Canada (n=1518)	17% 12% 16% 45%	Canada (n=456)	17% 15% 21% 53%+
Australia (n=456)	14% 11% 13% 38%	Australia (n=162)	16% 12% 16% 45% +
Iceland (n=455)	15% 10% <mark>10% 35%</mark>	Iceland (n=130)	22% <mark>+</mark> 10% 12% 43% +
Thailand (n=456)	17% 7%12% 35%	Thailand (n=129)	18% 8% 18% 44% +
Japan (n=455)	11% <mark>9% 12% 32%</mark>	Japan (n=128)	11% 13% 12% 35%
United Arab Emirates (n=456)	11% <mark>7%10%</mark> 28%	United Arab Emirates (n=141)	15% 9% 16% - 39% +
Mexico (n=455)	9% <mark>8% 8%</mark> 26%	Mexico (n=143)	14% 8% <mark>11%</mark> 34% 🛨
South Africa (n=455)	11% <mark>7%8%</mark> 26%	South Africa (n=144)	+ 17% 9% 11% 38% +
China (n=455)	9%5 <mark>%4</mark> % 19%	China (n=133)	11%6 <mark>%6%</mark> 23%
India (n=456)	9%3 <mark>%%</mark> / 16%	India (n=133)	11%4 <mark>33%</mark> 18%

27 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] C3. Please rate each destination in terms of what you are looking for in a holiday destination.

Destination Appeal



	Total Germany		HVG Audience
	■8 ■9 ■10 - Agree completely	Тор 3 box	
United States (n=455)		Jnited States (n=125)	19% 11% 28% 58%
Canada (n=1518)	16% 12% 22% 50%	Canada (n=456)	17% 15% 28% 60% +
Australia (n=456)	16% 12% 21% 48%	Australia (n=162)	16% 14% 23% 53%
Iceland (n=455)	14% 9% 16% 39%	Iceland (n=130)	18% 11% 16% 45%
Thailand (n=456)	13% 10% 17% 39%	Thailand (n=129)	16% 9% 23% 48% 🛨
Japan (n=455)	14% 7% 17% 38%	Japan (n=128)	15% <mark>8% 16% 39%</mark>
South Africa (n=455)	15% 9% 10% 33%	South Africa (n=144)	23% <mark>+</mark> 11% 11% 45% +
Mexico (n=455)	16% 6%10% 32%	Mexico (n=143)	19% <mark>7% 12% 38%</mark>
United Arab Emirates (n=456)	11%7%11% 30% United A	rab Emirates (n=141)	14% 8% 14% 36% +
China (n=455)	11%6% <mark>7%</mark> 24%	China (n=133)	8%6% <mark>10%</mark> 24%
India (n=456)	8%5 <mark>%5%</mark> 18%	India (n=133)	12%5 <mark>%</mark> 9 20%

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] C4. Please indicate how much you agree or disagree with the following statement for each destination. *"Is a destination that has a great deal of personal appeal to me"* 28

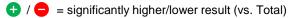
DESTINATION CANADA

Net Promoter Score (NPS)

	Total Germany						ŀ	e		
Detractors (0-6)) ■Passives (7-8) ■Promoters		rs (9-10)	NPS					NPS	
Canada (n=475)) 16% 33%		51%		+35%	Canada (n=225)	15%	33%	53%	+38%
United States (n=823)	25%	% 33%		2%	+17%	United States (n=331)	21% 😑	34%	44%	+23%
Australia (n=329)	25%	36%	36% 39%		+14%	Australia (n=166)	23%	40%	37%	+14%
Thailand (n=478)	29%	29% 31%		0%	+11%	Thailand (n=208)	26%	35%	39%	+13%
Iceland (n=307)	29%	9% 34%		7%	+7%	Iceland (n=138)	29%	37%	34%	+5%
Japan (n=277)	31% 32%		2% 37%		+6%	Japan (n=134)	30%	35%	35%	+5%
South Africa (n=323)	35%	34	4%	31%	-4%	South Africa (n=147)	31%	40% 😷	29%	-3%
United Arab Emirates (n=455)	39% 32%		32%	29%	-10%	United Arab Emirates (n=198)	38%	33%	29%	-10%
Mexico (n=365)	38%	38% 36% 26%		-11%	Mexico (n=172)	36%	38%	26%	-11%	
India (n=243)	449	44% 33% 23%		23%	-21%	India (n=109)	42%	38%	% 21%	-21%
China (n=258)	50%		50% 31%		-32%	China (n=123)	43%	- 36%	% 20%	-23% 🕁

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



Impressions of Canada as a Holiday Destination



Total Germany

HVG Audience

Has beautiful outdoor scenery and landscapes

Is a great place to see wildlife in its natural habitat

Is a place to form lifelong memories

Is a place I would be proud to tell people I have visited

Is a place where I can explore several different cities or regions in one trip

Is a place where I can experience things that I can't experience at home

Has great outdoor activities I would participate in

Is a place where I can get away from the stresses of everyday life

Offers activities that are physically challenging

Is a place I feel safe visiting (e.g. low crime, safe to walk around, safe for solo travel etc.)

Its cities have a lot of great attractions to see and do

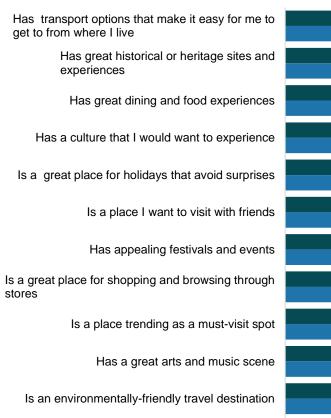
30

Its cities have a great atmosphere

Is a place I want to visit with my family

Is a socially responsible travel destination

	73% 71%
	65%
	64%
	64%
	64%
	62%
	63%
	62%
	62% 63%
	61%
	59%
	58% 57%
	58%
	62%
	58%
	56%
	56%
	57%
	55%
	58%
	53% 53%
4	18% 51%
4	8%
	53% 🛨



Offers good value for money

53% 🛨 45% 50% 🛨 43% 44% 42% 46% 🔂 41% 47% 🔂 41% 47% 38% 41% 37% 41% 37% 42% 🛨 36% 42% 🛨 36% 43% 🔂 24%

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.

31%

47%

Destination Attributes – Relative Strengths & Weaknesses: Among Total Germany



									South		United Arab	United
			Australia		Iceland	India		Mexico	Africa	Thailand		States
<u> </u>	n=	1518	456	455	455	456	455	455	455	456	456	455
Ordel tions	Is a place where I can get away from the stresses of everyday life											
Higher O Motivatio	Is a place to form lifelong memories											
Hig No	Is a place I would be proud to tell people I have visited											
s al	Is a place I feel safe visiting (e.g. low crime, safe to walk around, safe for solo travel etc.)											
General Needs	Is a place where I can explore several different cities or regions in one trip											
<u>B</u> S	Offers good value for money											
	Has transport options that make it easy for me to get to from where I live											
	Is a place I want to visit with friends											
٩	Is a place I want to visit with my family											
Trip	Is a great place for holidays that avoid surprises											
of	Is a place where I can experience things that I can't experience at home											
Type	Is an environmentally-friendly travel destination											
Ε.	Is a socially responsible travel destination											
	Is a place trending as a must-visit spot											
	Offers activities that are physically challenging											
	Is a great place for shopping and browsing through stores											
0	Its cities have a lot of great attractions to see and do											
0-D0	Has great outdoor activities I would participate in											
F.	Has great dining and food experiences											
	Has a great arts and music scene											
	Has appealing festivals and events											
	Its cities have a great atmosphere											
6	Has beautiful outdoor scenery and landscapes											
To-Se	Is a great place to see wildlife in its natural habitat											
Ĕ	Has great historical or heritage sites and experiences											
	Has a culture that I would want to experience											

31

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



n= 456 162 133 130 133 128 143 144 129 141 125 Is a place where I can get away from the stresses of everyday life Is a place I feel safe visiting (e.g. low crime, safe to walk around, safe for solo travel etc.) Is a place I feel safe visiting (e.g. low crime, safe to walk around, safe for solo travel etc.) Is a place I feel safe visiting (e.g. low crime, safe to walk around, safe for solo travel etc.) Is a place where I can explore several different cities or regions in one trip Offers good value for money Is a place I want to visit with friends Is a place I want to visit with friends Is a place I want to visit with friends Is a place I want to visit with friends Is a place to for holidays that avoid surprises Image: Im										South		United Arab	United
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		-											
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Is a great place to see wildlife in its natural habitat Image: Comparison of the set o	ė_												
Has a culture that I would want to experience													

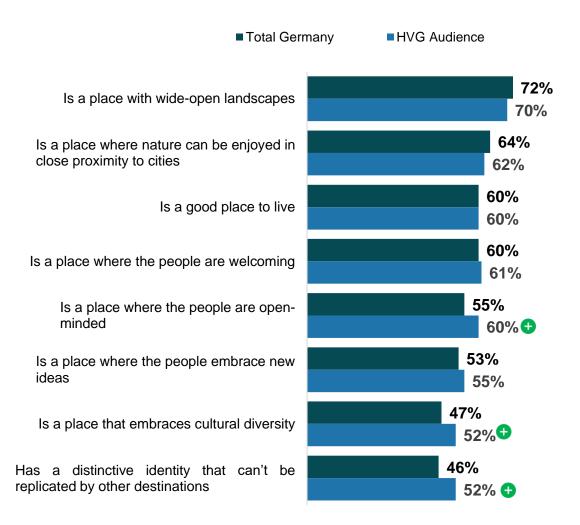
32

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





33

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



		Australia		Iceland	India	Japan	Mexico		Thailand		States
Is a place with wide-open landscapes	= 1518	456	455	455	456	455	455	455	456	456	455
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											

34

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												
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 destinatio	ns											

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.



Germany GTRP – December 2023

Destination Attributes: Drivers Analysis: Among Total Germany



= Brand Value Stateme	Is a place I want to visit with my family	5.85%
	Is a place I want to visit with friends	5.25%
	Is a good place to live	5.22%
	Has a culture that I would want to experience	4.62%
	Is a great place for holidays that avoid surprises	4.55%
	Is an environmentally-friendly travel destination	4.09%
	Is a place trending as a must-visit spot	3.91%
	Is a socially responsible travel destination	3.78%
	Is a place I would be proud to tell people I have visited	3.71%
	Offers good value for money	3.50%
	Has great outdoor activities I would participate in	3.18%
	Its cities have a lot of great attractions to see and do	2.98%
	Is a place to form lifelong memories	2.92%
	Is a place that embraces cultural diversity	2.74%
	Its cities have a great atmosphere	2.74%
	Is a place where I can explore several different cities or regions in one trip	2.64%
	Is a place where the people are welcoming	2.50%
	Is a place where I can experience things that I can't experience at home	2.46%
	Has a great arts and music scene	2.41%
	Is a place with wide-open landscapes	2.38%
	Is a place where the people are open-minded	2.33%
	Is a place where I can get away from the stresses of everyday life	2.32%
	Has great dining and food experiences	2.28%
	Has a distinctive identity that can't be replicated by other destinations	2.26%
	Has transport options that make it easy for me to get to from where I live	2.20%
	Is a place I feel safe visiting (e.g. low crime, safe to walk around, safe for solo travel etc.)	2.17%
	Has appealing festivals and events	1.96%
	Is a great place to see wildlife in its natural habitat	1.95%
	Has beautiful outdoor scenery and landscapes	1.93%
	Is a great place for shopping and browsing through stores	1.91%
	Is a place where nature can be enjoyed in close proximity to cities	1.89%
	Is a place where the people embrace new ideas	1.85%
	Has great historical or heritage sites and experiences	1.82%
	Offers activities that are physically challenging	1.71%

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.

36

Base: Long-hall 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: Drivers Analysis: Among HVG Audience



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%.

y	ent Is a place I want to visit with my family	nd Value Statement
	Is a place I want to visit with friends	
	Is a good place to live	
	Is a place I would be proud to tell people I have visited	
	Is a place trending as a must-visit spot	
e 4.62%	Has a culture that I would want to experience	
	Is a great place for holidays that avoid surprises	
n 3.44%	Is an environmentally-friendly travel destination	
	Is a place where the people are open-minded	
	Offers good value for money	
g 3.11%	Is a place where the people are welcoming	
	Is a place where I can get away from the stresses of everyday life	
e 2.87%	Has transport options that make it easy for me to get to from where I live	
e 2.83%	Has a great arts and music scene	
n 2.82%	Is a socially responsible travel destination	
• 2.81%	Its cities have a lot of great attractions to see and do	
e 2.77%	Its cities have a great atmosphere	
2.61%	Has great outdoor activities I would participate in	
p 2.58%	Is a place where I can explore several different cities or regions in one trip	
.) 2.52%	Is a place I feel safe visiting (e.g. low crime, safe to walk around, safe for solo travel etc.)	ls
s 2.41%	Is a place to form lifelong memories	
s 2.40%	Has a distinctive identity that can't be replicated by other destinations	
y 2.19%	Is a place that embraces cultural diversity	
s 2.08%	Has great historical or heritage sites and experiences	
	Has great dining and food experiences	
s 1.93%	Is a place where nature can be enjoyed in close proximity to cities	
s 1.87%	Is a great place for shopping and browsing through stores	
s 1.81%	Is a place with wide-open landscapes	
s 1.69%	Is a place where the people embrace new ideas	
at 1.67%	Is a great place to see wildlife in its natural habitat	
	Has appealing festivals and events	
	Offers activities that are physically challenging	
	Has beautiful outdoor scenery and landscapes	
e 1.25%	Is a place where I can experience things that I can't experience at home	

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.

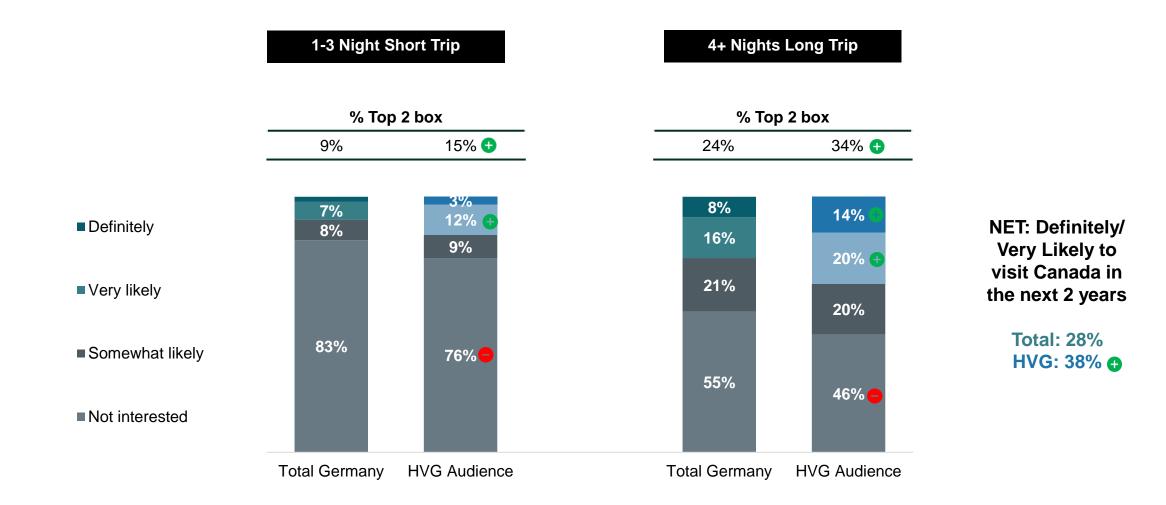


Travel Intentions to Canada



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

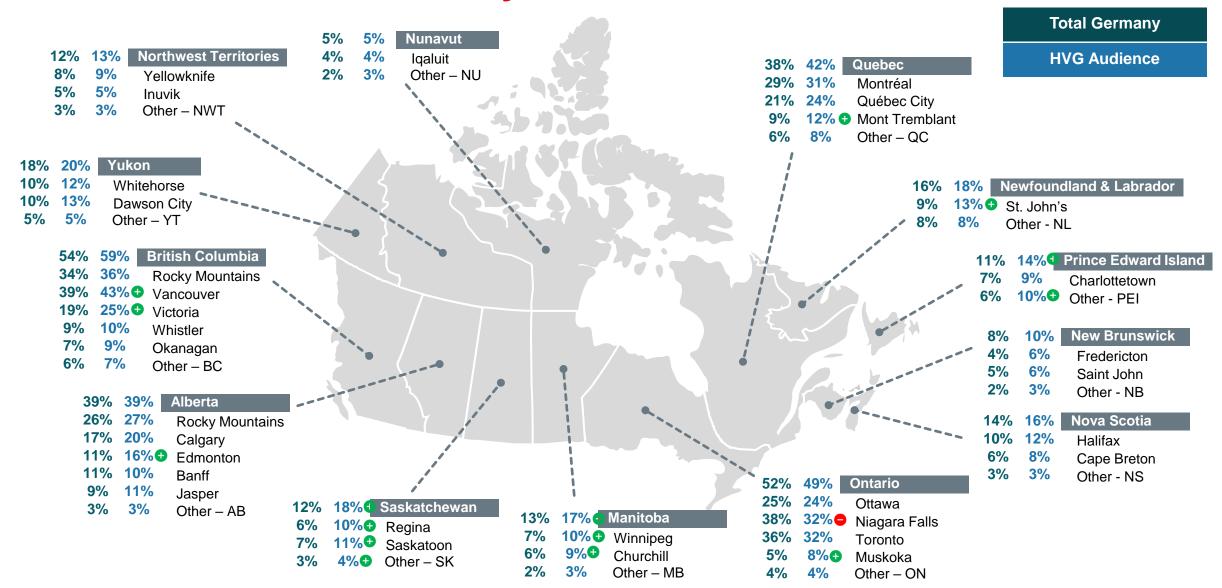




39 Note: "Not interested" is comprised of those saying not very likely, not at all likely, or indicating no intention to visit Canada Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1518); HVG (n=456) E1. Realistically, how likely are you to take a holiday trip to Canada in the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

B /

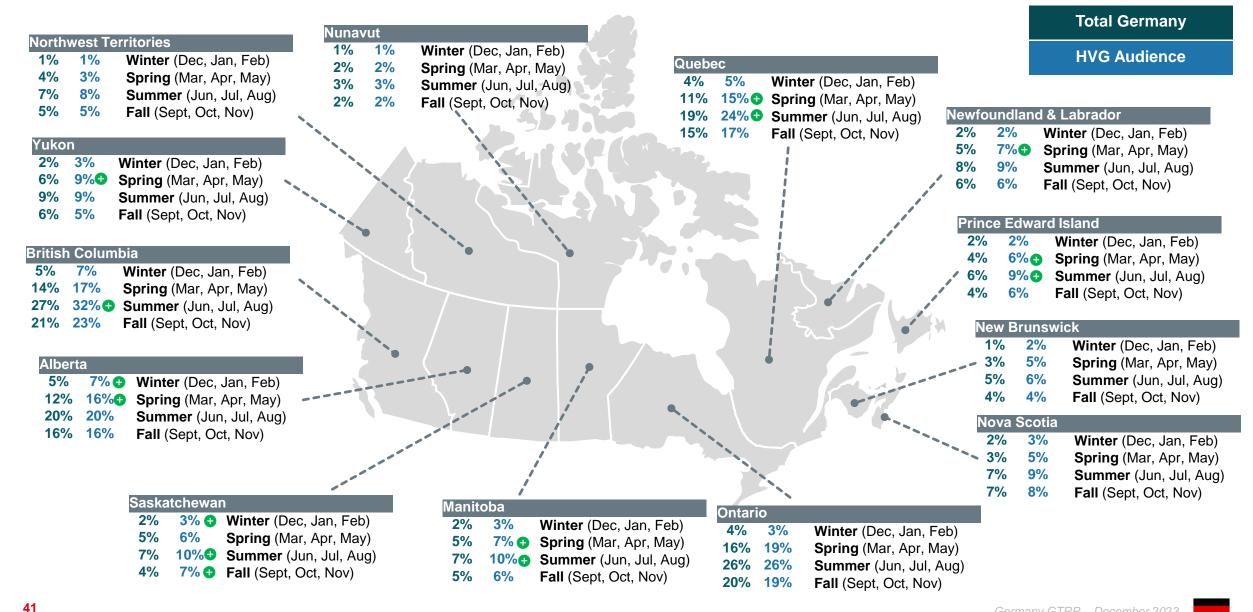
Canadian Destinations Likely to Visit



40 Base: Those in the dream to purchase stages of the path to purchase for Canada & definitely/very likely to take a trip to Canada (n=992); HVG (n=311) E2. If you were to take a holiday trip to Canada, in the next 2 years, which of the following Canadian provinces or territories are you likely to visit? (Select all that apply) E4a-m. Within [PROVINCE], which travel destinations are you likely to visit? (Select all that apply) DESTINATION

CANADA

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

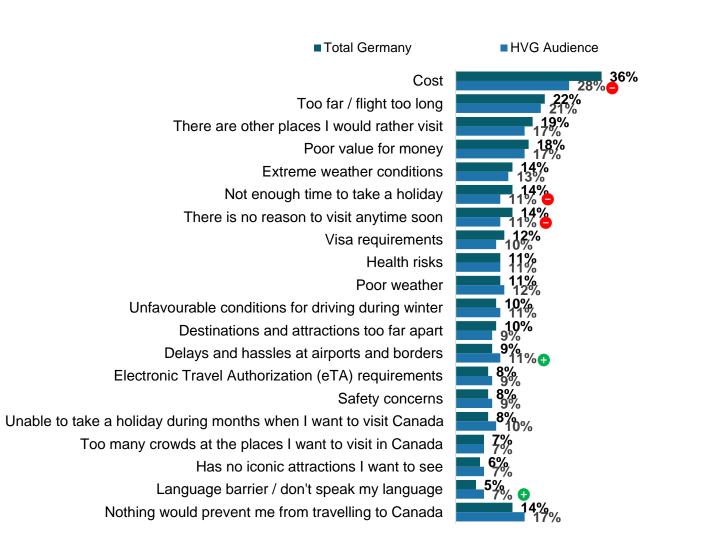


Base: Those in the dream to purchase stages of the path to purchase for Canada & definitely/very likely to take a trip to Canada (n=992); HVG (n=311) E3a-m. During what time of year are you considering visiting [PROVINCE]? (Select all that apply)

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

Barriers for Visiting Canada





Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1518); HVG (n=456) E5. Which of the following factors might discourage you from visiting Canada? (Select all that apply)



Travel Behaviours



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		

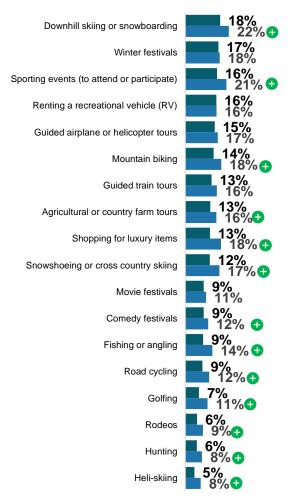
44 Base: Long-haul pleasure travellers (past 3 years or next 2 years) D4. In general, what activities or places are you interested in while on holiday? (Select all that apply) D5. Among these activities are there any that are important enough that you would base an entire trip around that activity? (Select all that apply)

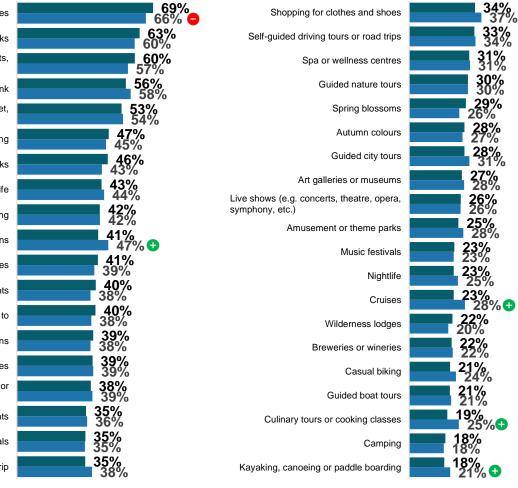


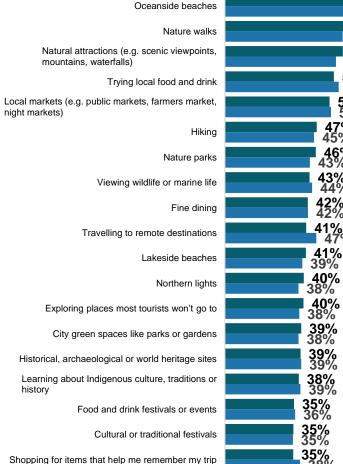
B /

General Activities Interested In

Total Germany HVG Audience







Germany GTRP – December 2023

= significantly higher/lower result (vs. Total)

DESTINATION

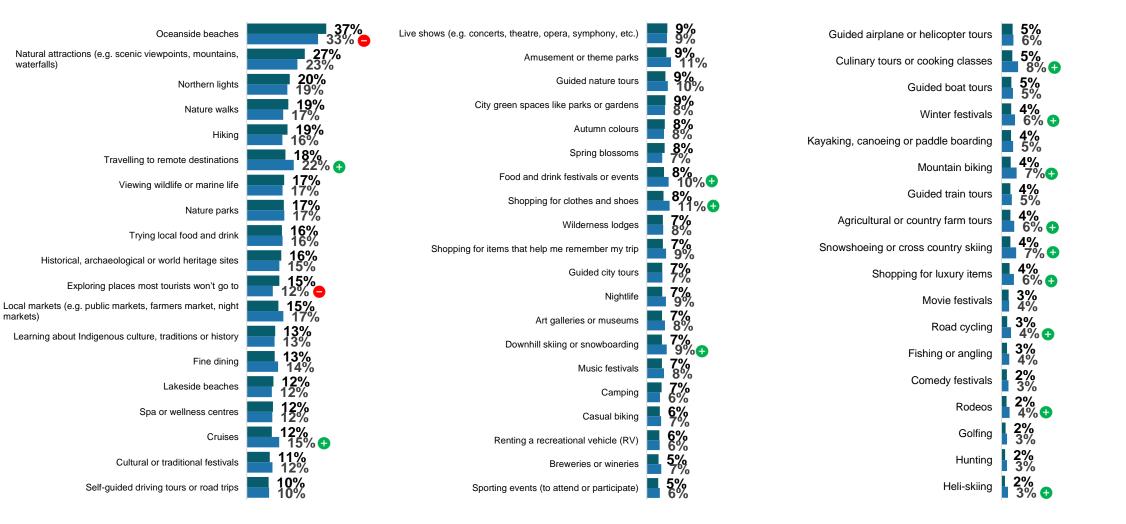
CANADA

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1518); HVG (n=456) D4. In general, what activities or places are you interested in while on holiday? (Select all that apply)



Trip Anchor Activities

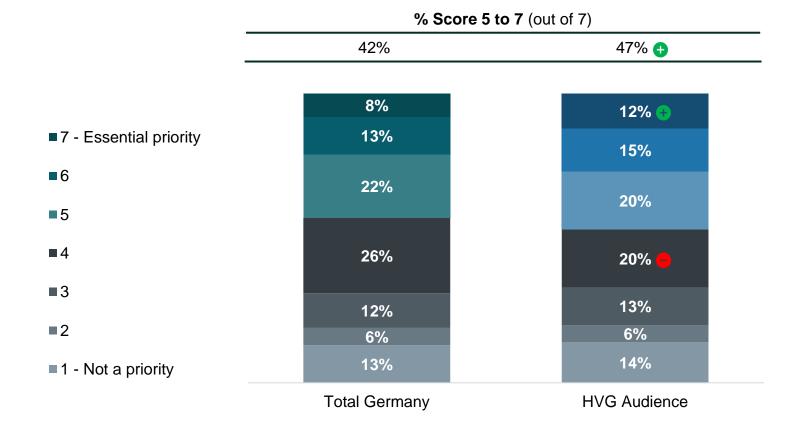
Total Germany HVG Audience



Base: Long-haul pleasure travellers (past 3 years or next 2 years) Selected an activity (n=1498); HVG (n=454) D5. Among these activities are there any that are important enough that you would base an entire trip around that activity? (Select all that apply)

Priority of Sustainable Travel When Planning a Trip





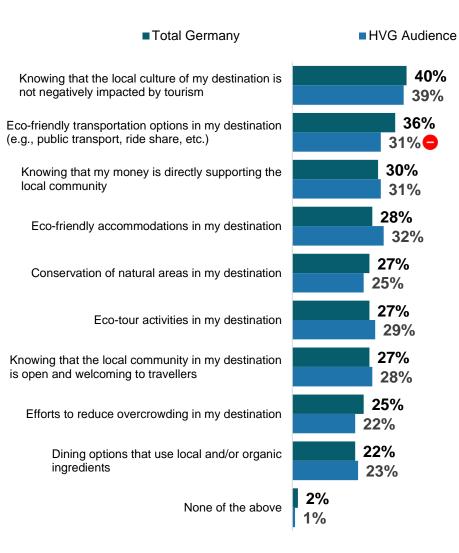
Sustainable Travel Description

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'.

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

Top 3 Most Important Sustainability Efforts



48

Sustainable Travel Description

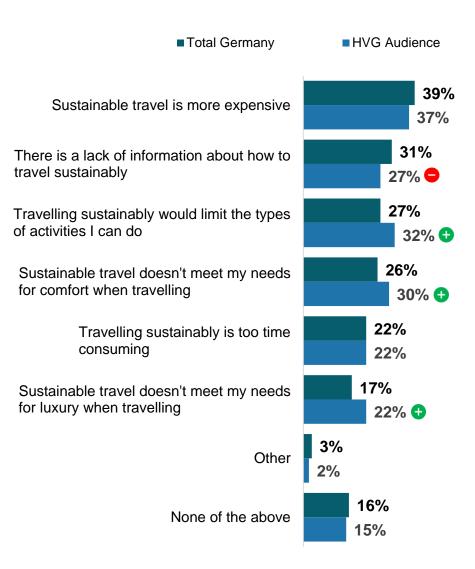
Sustainable travel refers to "travel that minimizes any negative impacts on the destination's environment, economy and society, while making positive contributions to the local people and conserving the destination's natural and cultural heritage".



DESTINATION

CANADA

Barriers to Sustainable Travel



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.

DESTINATION

Sustainable Travel Description

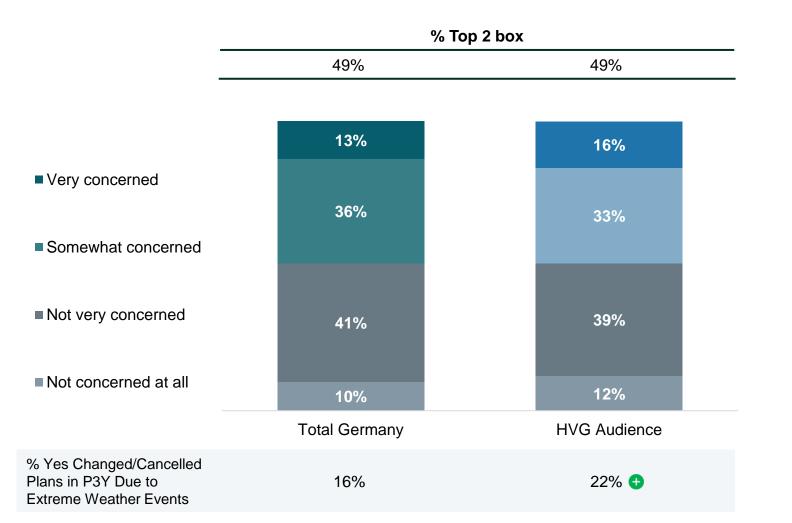
Sustainable travel refers to "travel that minimizes any negative impacts on the destination's environment, economy and society, while making positive contributions to the local people and conserving the destination's natural and cultural heritage".

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



Impact of Extreme Weather Events on Travel Plans





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?

50

D11. In the past 3 years, have you ever had to change plans or cancel a trip due to extreme weather events?

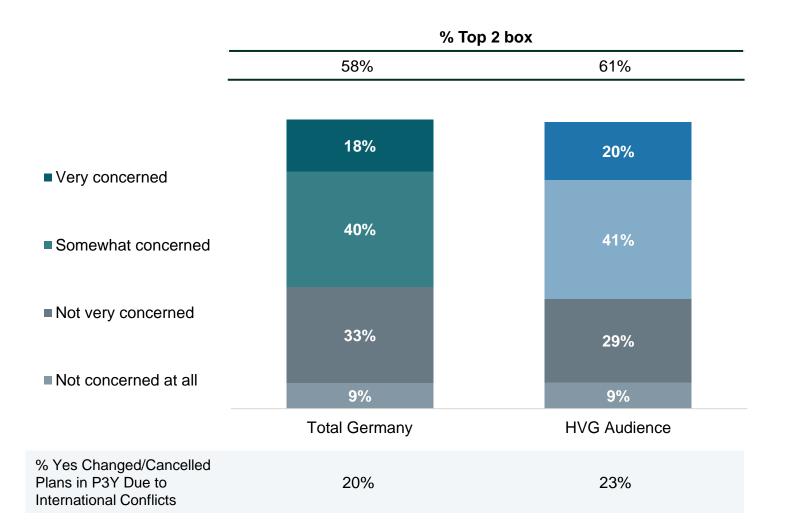
Extreme Weather Events Description

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





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?

51

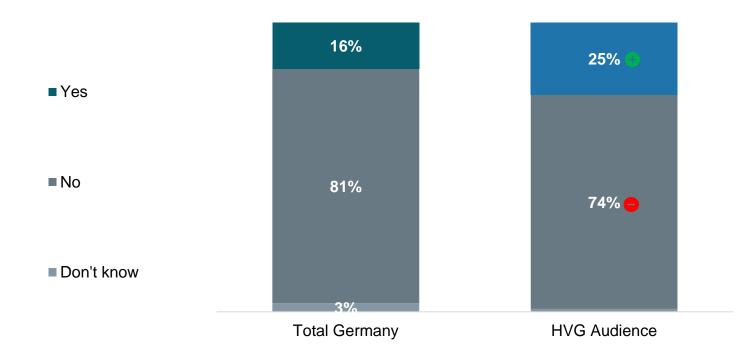
International Conflicts Description

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

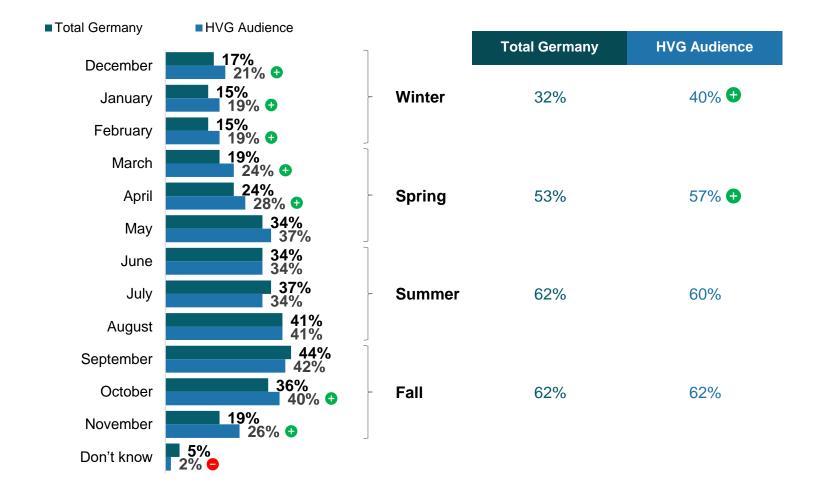
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Yellowknife Northwest Territories

Preferred Time of Year for Holiday Trips





54

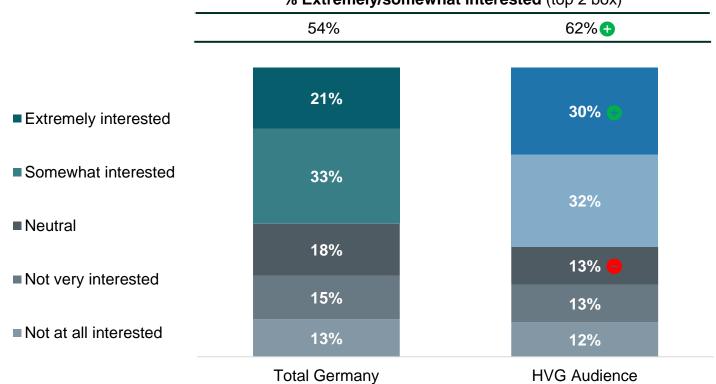
Germany GTRP – December 2023 = significantly higher/lower result (vs. Total)

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)23

Interest in Winter Holidays





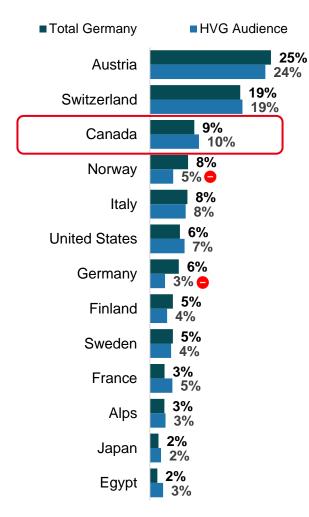
% Extremely/somewhat interested (top 2 box)

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





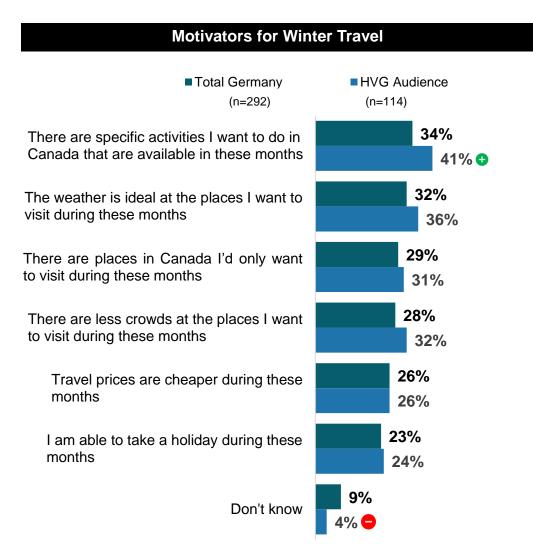
Note: respondents were asked either about winter travel (B2/D2) or autumn/fall travel (B3/D3) Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=731); HVG (n=218) B2. What destinations come to mind when thinking about travel to experience the **winter season**? (Please list up to 3 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 56 8 trip.

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.

Motivators & Barriers for Winter Travel to Canada





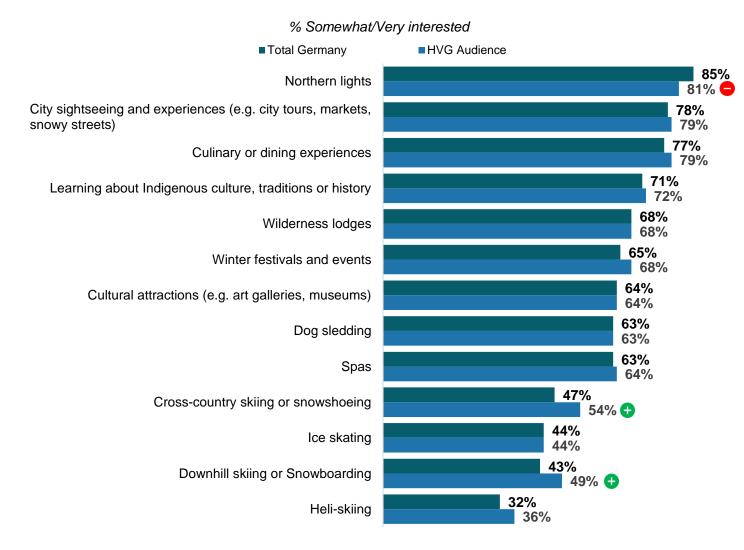
57

Barriers for Winter Travel					
■ Total Germany (n=700)	HVG Audience (n=197)				
The weather is too cold at the places I want to visit during these months	44% 41%				
There are other places I'd rather visit during these months	19% 22%				
I am unable to take a holiday during these months	17% 16%				
The activities I want to do are not available in these months	14% 15%				
I don't know enough about what activities are available during these months	12% 12%				
Travel prices are more expensive during these months	10% 12%				
My kids are in school and I don't want them to miss class	9% 10%				
There are too many crowds at the places I want to visit during these months	5% 5%				
Nothing would prevent me from travelling to Canada during these months	16% 18%				

why you would not be interested in travelling to Canada for a holiday during these winter months?

Interest in Winter Activities in Canada

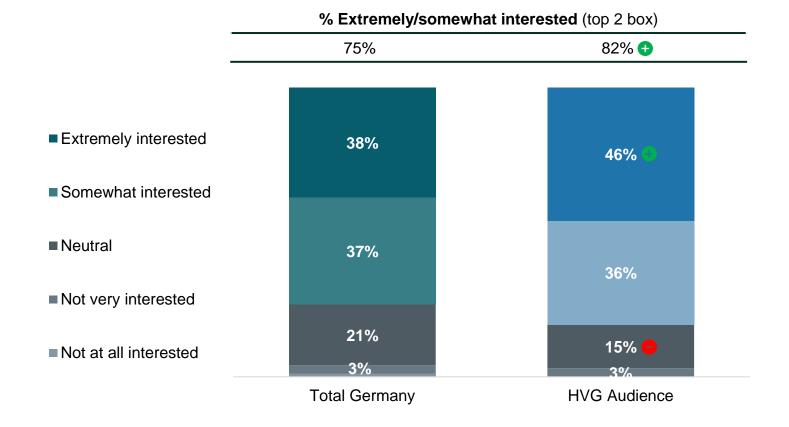




Base: Those in the dream to purchase stages of the path to purchase for Canada (n=992); HVG (n=311) E10. What is your level of interest in the following activities or experiences in Canada during the <u>winter season</u>?

Interest in Fall Holidays





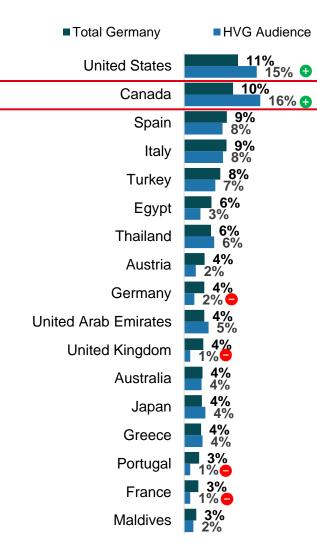
Autumn Season Description

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.

59 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) D3. In general, how interested are you in taking a holiday trip to a destination during <u>its autumn season</u>?

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

Unaided Fall Destinations



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.

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.



DESTINATION



Motivators & Barriers for Fall Travel to Canada



Motivators for Fa	II Travel	
■ Total Germany (n=619)	■ HVG Audience (n=208)	
The weather is ideal at the places I want to visit during these months	40% 39%	
There are less crowds at the places I want to visit during these months	32% 29%	
Travel prices are cheaper during these months	26% 25%	
I am able to take a holiday during these months	24% 28%	
There are places in Canada I'd only want to visit during these months	21% 22%	
There are specific activities I want to do in Canada that are available in these months	20% 23%	
It's school holidays so I can enjoy a family trip	12% 14%	
Don't know	8% 9%	

61

Barriers for Fa	all Travel			
■ Total Germany (n=373)	HVG Audience (n=103)			
The weather is not ideal at the places I want to visit during these months	20% 19%			
I am unable to take a holiday during these months	19% 14%			
There are other places I'd rather visit during these months	16% 17%			
I don't know enough about what activities are available during these months	14% 18%			
Travel prices are more expensive during these months	14% 14%			
My kids are in school and I don't want them to miss class	13% 9%			
The activities I want to do are not available in these months	9% 7%			
There are too many crowds at the places I want to visit during these months	7% 10%			
Nothing would prevent me from travelling to Canada during these months	23% 25%			

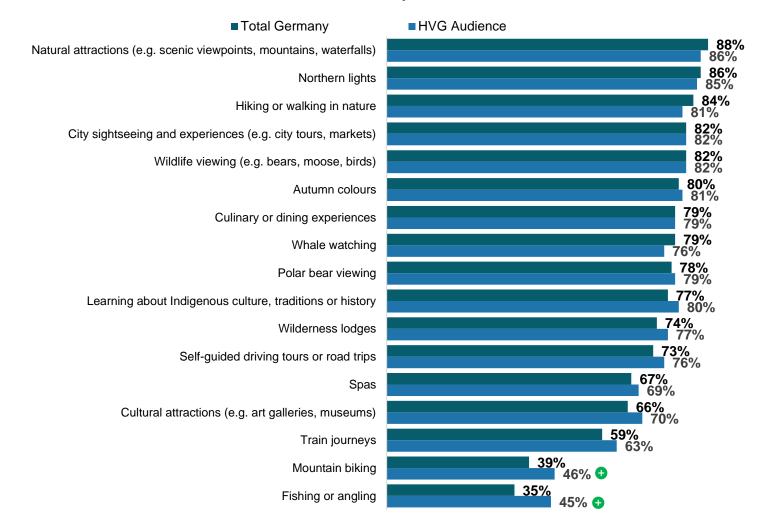
Base: Those in the dream to purchase stages of the path to purchase for Canada and <u>considering</u> visiting Canada or any province/territory in September, October or November E6a. You indicated earlier that you are considering taking a holiday to **Canada** during the months of September, October 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 <u>not considering</u> 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 be interested in travelling to Canada for a holiday to **Canada** and <u>not considering</u> 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**?

Interest in Fall Activities in 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 <u>autumn season</u>?



Indigenous Tourism



Unaided Mentions – Indigenous Cultural & Tourism Activities

36%

35%

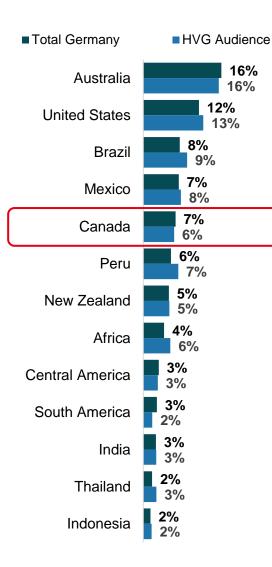




Indigenous Peoples Description

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



Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1518); HVG (n=456) 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.) [DESCRIPTION] Please note: You do not have to limit your responses to destinations you are considering for a holiday 65 Ð trip.

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.

DESTINATION

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

Interest in Indigenous Cultural & Tourism Activities



% Somewhat/Very interested

Total Germany

any HVG Audience

Experiencing Indigenous food and drink

Indigenous adventure or excursions in nature (kayak, heritage parks, northern lights, etc.)

Learning about Indigenous ways of life by visiting an Indigenous community

Learning about Indigenous ways of life through storytelling or connecting with Indigenous Elders

Stay in Indigenous accommodation (camping, hotel, inn, non-traditional accommodation, etc.)

Visiting a museum, interpretation center or traditional Indigenous site

Visiting remote northern Indigenous communities

Attending an Indigenous Pow Wow, festival, event, or performance

Visiting an Indigenous boutique or art/craft exhibition

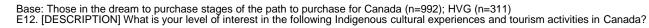
Learning about residential schools and reconciliation with Indigenous peoples

Hunting and fishing activity with an Indigenous outfitter

		81%
		83%
		77%
		78%
		10%
		76%
		78%
		73%
		77% 🕁
		71%
		74%
		- 70%
		73%
		13%
	6	69%
		73%
	6	8%
	0	73% ⊕
	_	13700
	66	%
	6	59%
	64%	4
	64 ⁹	-
	047	0
42%		
48% 🛨		

Indigenous Tourism Description

As you may or may not know, in Canada, Indigenous tourism businesses are majorityowned 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

Å

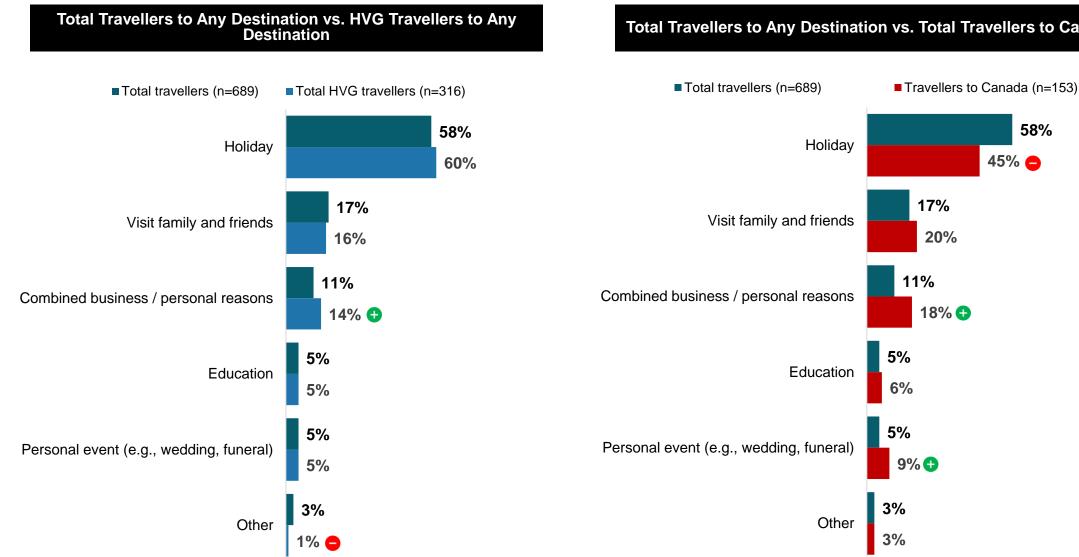


Main Purpose of Recent Trip



58%

45%

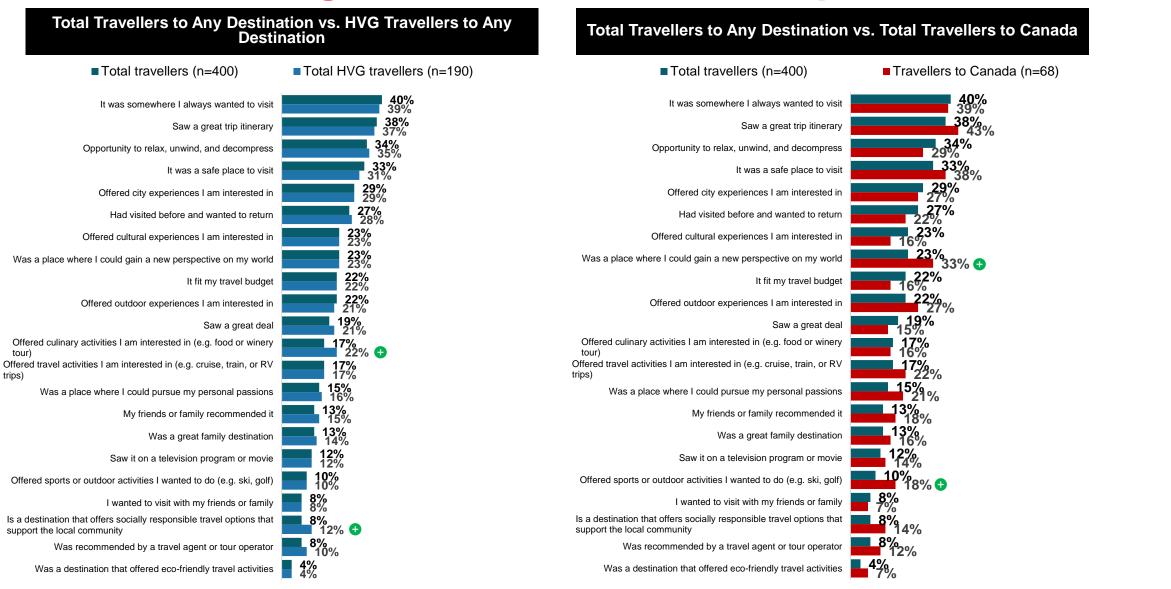


Total Travellers to Any Destination vs. Total Travellers to Canada

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

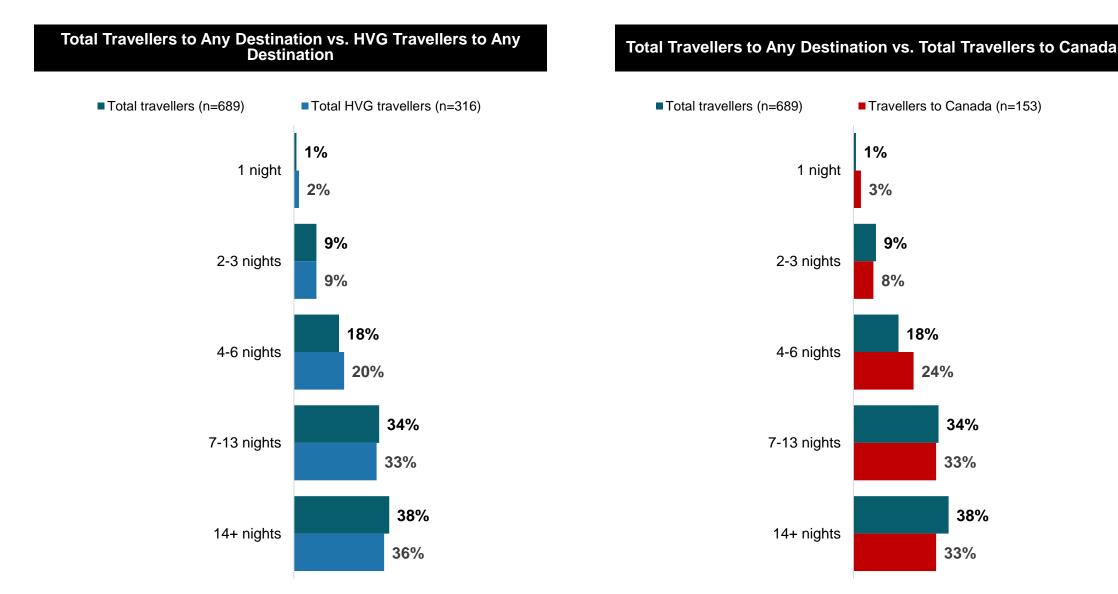
Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination (n=689); HVG (n=316); Travellers to Canada (n=153) F2. What was the main purpose of this trip? (Select one)

Factors in Choosing Destination for Recent Trip



Nights Spent During Recent Trip

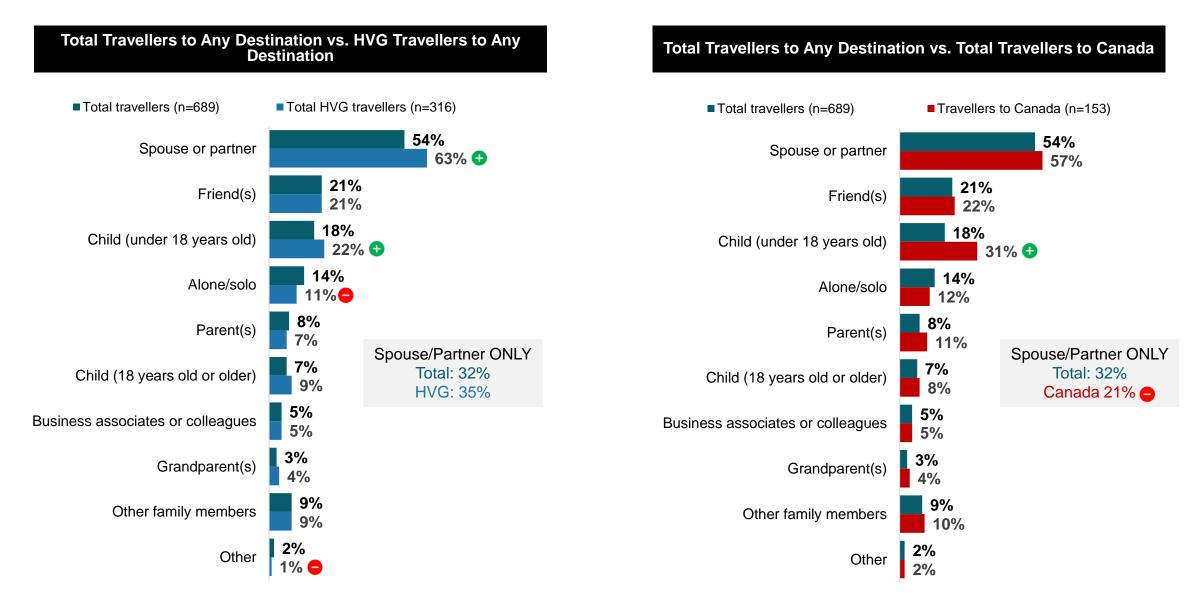




Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination (n=689); HVG (n=316); Travellers to Canada (n=153) F4. How many nights did you spend in this destination?

Travel Party of Recent Trip



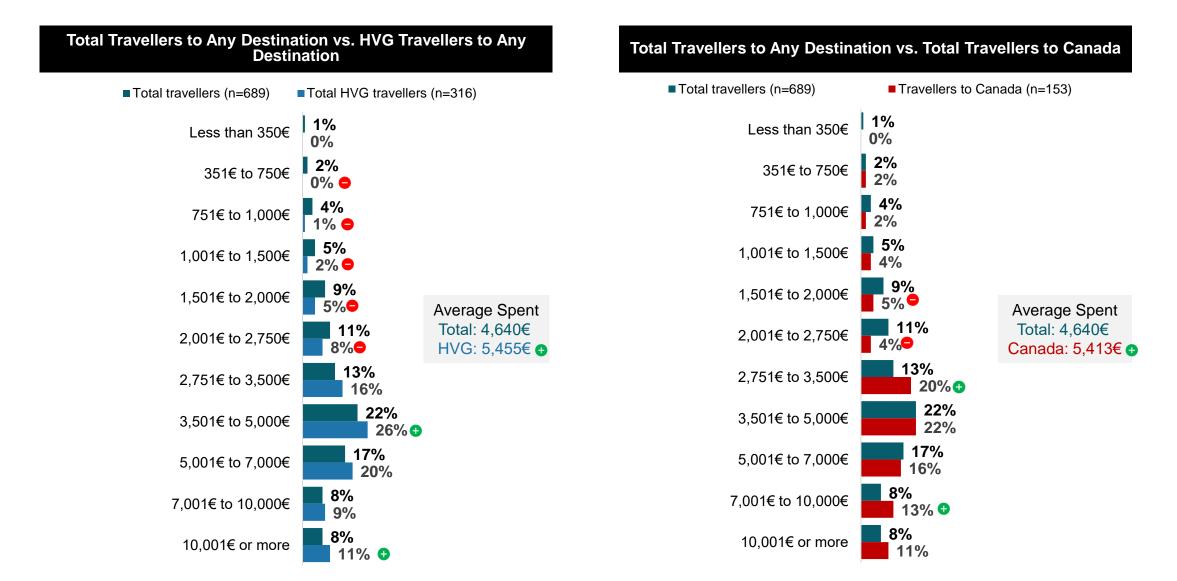


Germany GTRP – December 2023 = significantly higher/lower result (vs. Total)

Amount Spent for Recent Trip

72





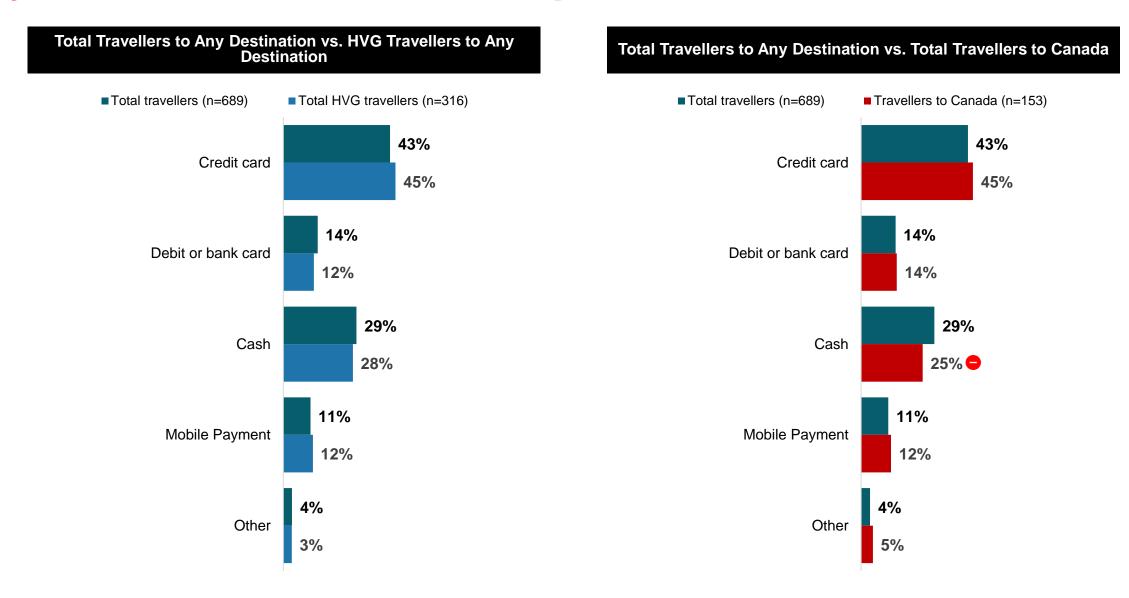
Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination (n=689); HVG (n=316); Travellers to Canada (n=153) F6. Overall how much did you spend on this trip? Consider the primary transportation to and from the destination, accommodation, dining, activities, shopping, and any other expenses.

8

= significantly higher/lower result (vs. Total)

Payment Methods for Recent Trip





73 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) F8. Approximately what percentage of your purchases did you make during your trip with each of the following payment methods? Your best guess is fine. (Enter one number per row. Your total must add to 100%).

Travel Agents/Tour Operator Usage For Recent Trip

Total Travellers to Any Destination vs. HVG Travellers to Any Total Travellers to Any Destination vs. Total Travellers to Canada Destination ■ Total travellers (n=271) Total HVG travellers (n=126) ■ Total travellers (n=271) Travellers to Canada (n=69) 50% 50% **Booking flights Booking flights** 50% 41% 43% 43% Booking accommodations Booking accommodations 47% 37% % Used a travel agent % Used a travel agent 40% 40% **Researching flights Researching flights Total:** 40% **Total:** 40% 39% 43% **Canada:** 45% **HVG:** 40% 36% 36% Researching accommodations Researching accommodations 39% 37% 35% 35% Booking ground transportation Booking ground transportation 38% 29% 28% 28% Researching ground transportation Researching ground transportation 25% 28% 27% 27% Booking activities to see and do Booking activities to see and do 28% 25% 24% 24% Researching activities to see and do Researching activities to see and do 24% 23% 23% Researching potential travel 23% Researching potential travel destinations 26% destinations 23%

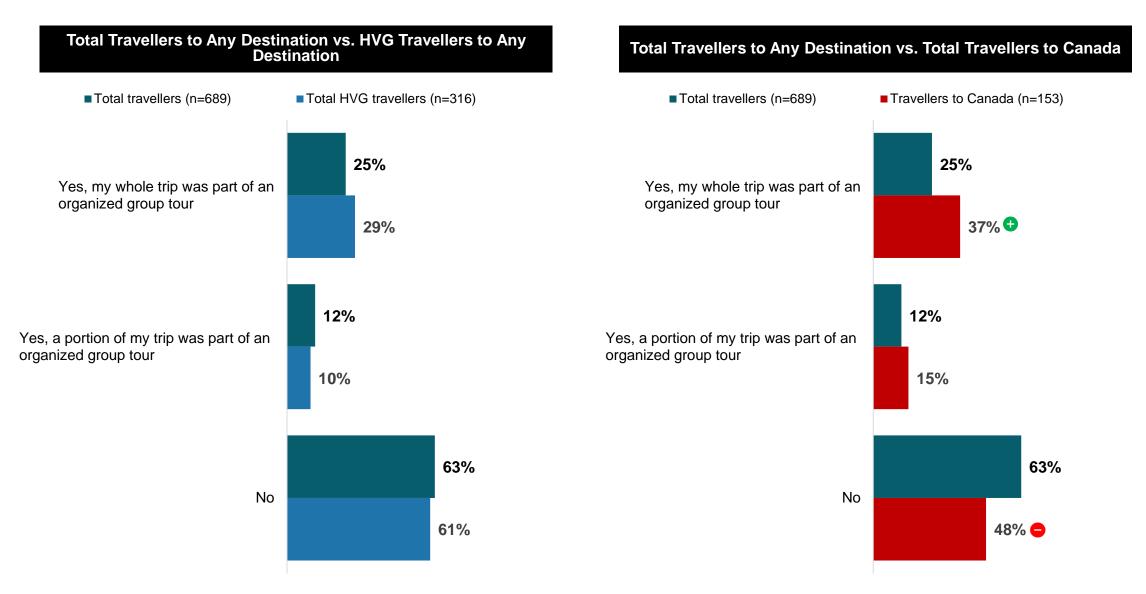
Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination, Used a Travel Agent/Tour Operator (n=271); HVG (n=126); Travellers to Canada (n=69)
 F9. Travel agents offer personalized service to help individuals, groups, and business travellers plan and organize their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

DESTINATION

Organized Group Tour Usage For Recent Trip



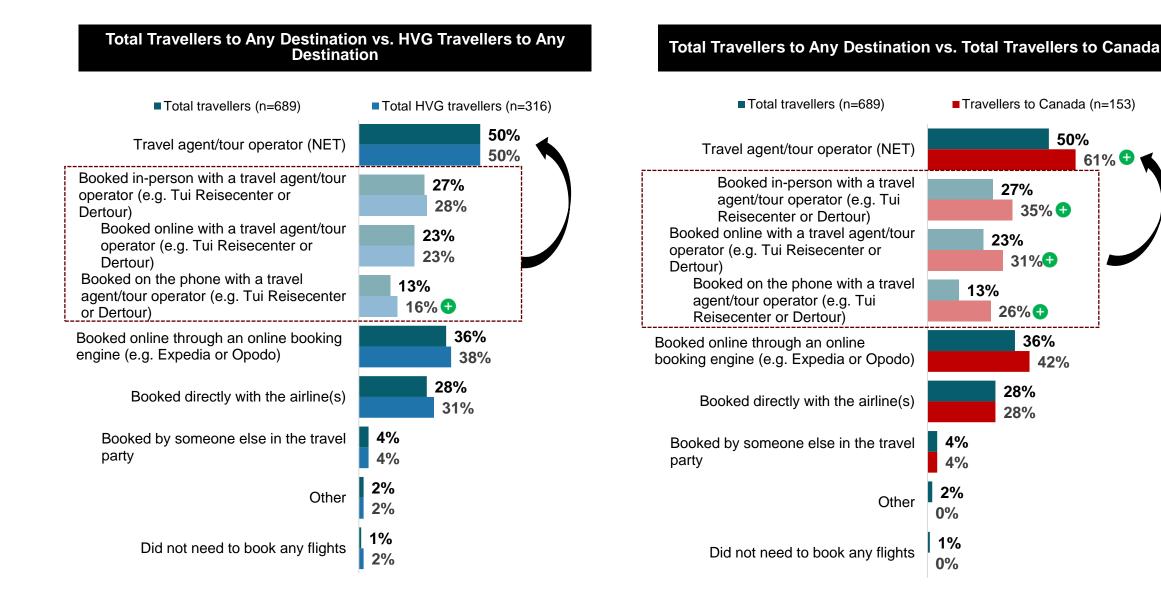


75 Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination (n=689); HVG (n=316); Travellers to Canada (n=153) F11. An organized group tour consists of a package where any combination of accommodation, transportation, food and/or activities are included as a multi-day itinerary. Did you travel as a part of an organized group tour on this trip?

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

Booking Flights For Recent Trip





76

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

50%

42%

61%

Booking Accommodations For Recent Trip



■ Total travellers (n=689)	Total HVG travellers (n=316)	■ Total travellers (n=689)	Travellers to Canada (n=15)
Travel agent/tour operator (NET)	45% 45%	Travel agent/tour operator (NET)	45%
Booked online with a travel agent/tour operator (e.g. Tui Reisecenter or Dertour)	22% 21%	Booked online with a travel agent/tour operator (e.g. Tui Reisecenter or Dertour)	22% 24%
Booked in-person with a travel agent/tour operator (e.g. Tui Reisecenter or Dertour)	21% 22%	Booked in-person with a travel agent/tour operator (e.g. Tui Reisecenter or Dertour)	21% 24%
Booked on the phone with a travel agent/tour operator (e.g. Tui Reisecenter or Dertour)	11% 12%	Booked on the phone with a travel agent/tour operator (e.g. Tui Reisecenter or Dertour)	11% 18% ⊕
Booked online through an online booking engine (e.g. Expedia or Opodo)	37% 40%	Booked online through an online booking engine (e.g. Expedia or Opodo)	37% 38%
Booked directly with the lodging/accommodation establishment	18% 21%	Booked directly with the lodging/accommodation establishment	18% 18%
Booked through accommodation sharing services website (e.g. Airbnb)	13% 16%+	Booked through accommodation sharing services website (e.g. Airbnb)	13% 17%
Booked through a visitors information centre at the destination	9% 11% +	Booked through a visitors information centre at the destination	9% 13% +
Booked by someone else in the travel party	3% 3%	Booked by someone else in the travel party	3% 2%
Other	3% 2%	Other	3% 1%
Did not need to book any accommodation	7% 6%	Did not need to book any accommodation	7% 6%

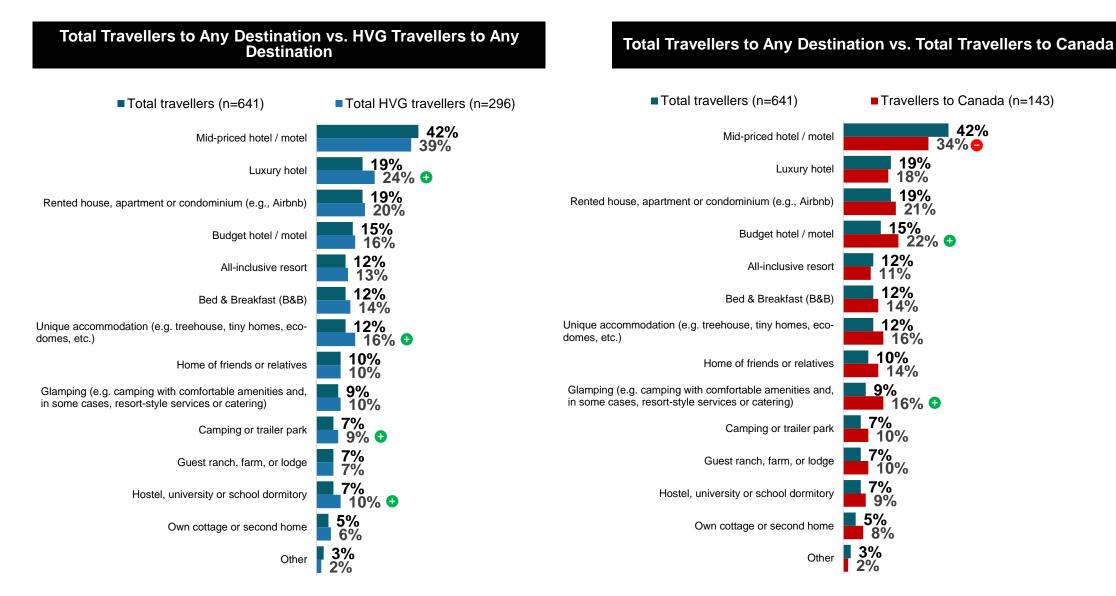
Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination (n=689); HVG (n=316); Travellers to Canada (n=153) F13. How did you book your <u>accommodation</u> for this trip? (Select all that apply)

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77

Type of Accommodations For Recent Trip

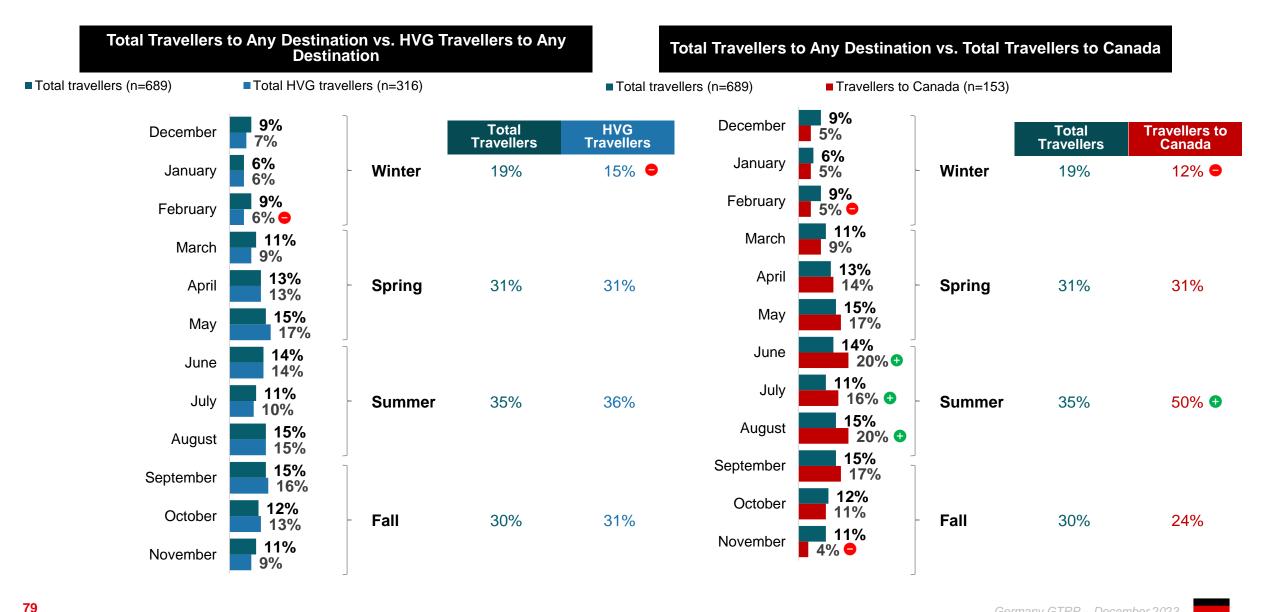




78 Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination, Booked Accommodation (n=641); HVG (n=296); Travellers to Canada (n=143)
 F14. Which type of accommodation did you stay in during this trip? (Select all that apply)

Time of Year Travelled For Recent Trip







Most Recent Trip to Canada



Top 10 Activities Participated in During Recent Trip to Canada

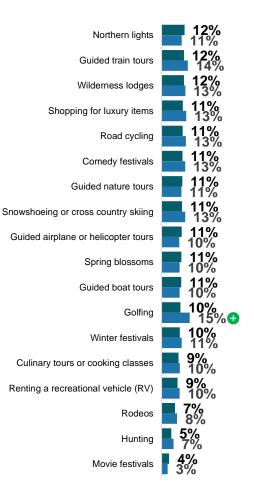


Total Travellers (n=153)	Total HVG Travellers (n=94)
Nature walks	Hiking
Hiking	Nature walks
Natural attractions (e.g. scenic viewpoints, mountains, waterfalls)	Natural attractions (e.g. scenic viewpoints, mountains, waterfalls)
Nature parks	Nature parks
Local markets (e.g. public markets, farmers market, 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

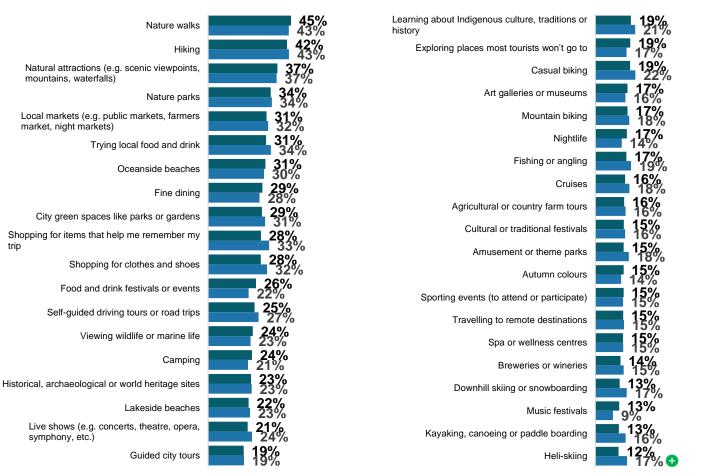
81



Activities Participated in During Recent Trip to Canada

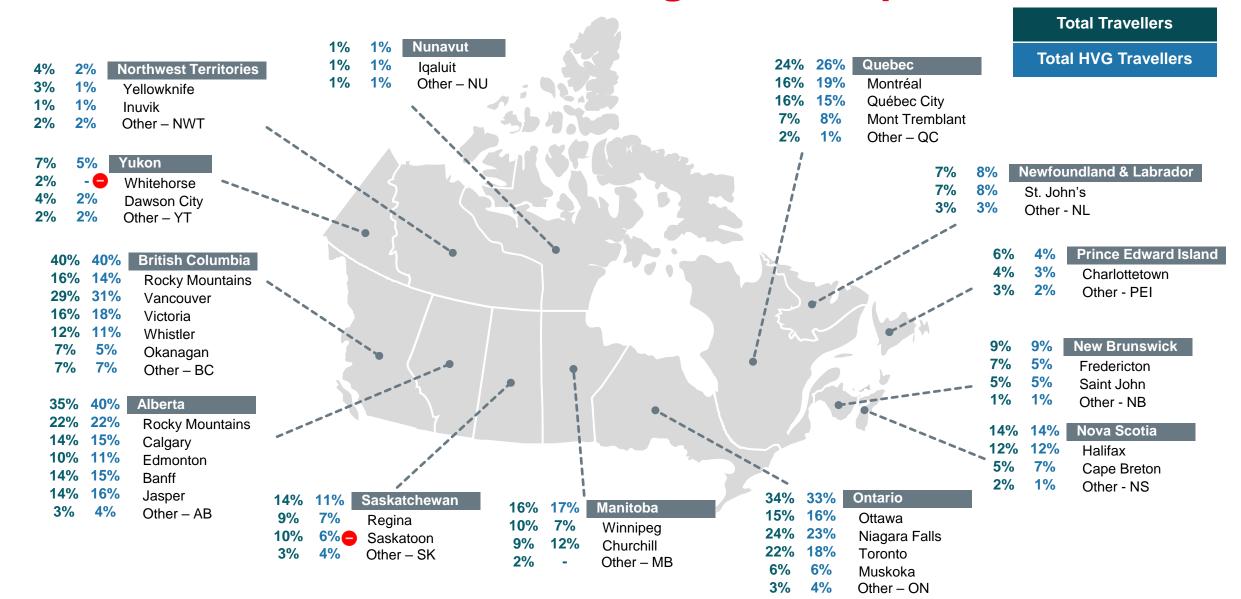






Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to Canada (n=153); HVG (n=94) F16. Which of the following activities, if any, did you participate in during your recent trip to Canada? (Select all that apply)

Canadian Destinations Visited During Recent Trip



83 Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to Canada (n=153); HVG (n=94) F17. Which of the following Canadian provinces or territories did you visit on this trip? (Select all that apply) F18a-m. Within [PROVINCE], which travel destinations did you visit? (Select all that apply)

Germany GTRP – December 2023

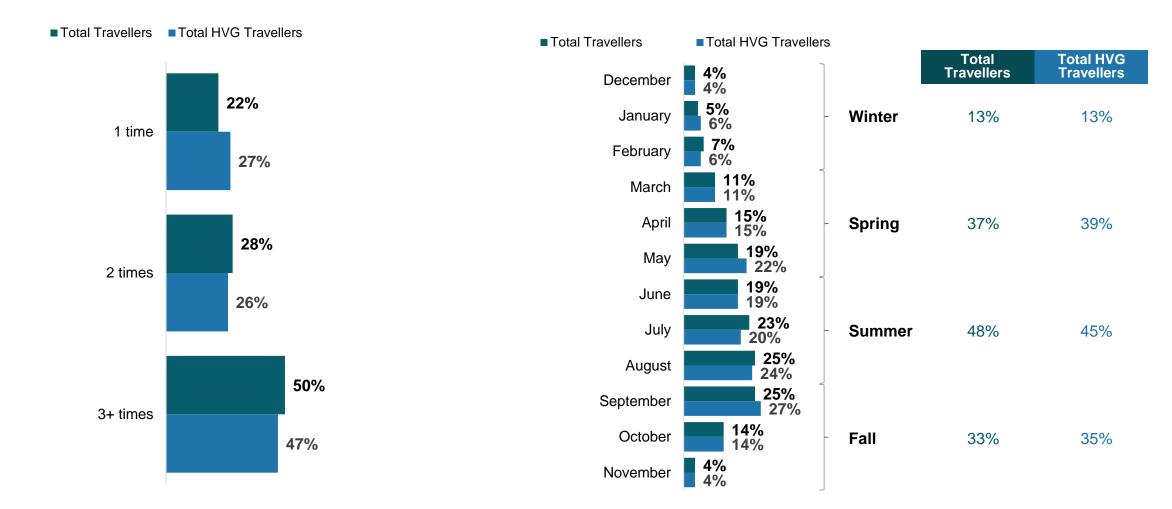
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DESTINATION

CANADA

Number of Visits Ever & Time of Year Visited Canada





84 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)

Demographics



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

THANK YOU

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



