

CONFIDENTIAL

# 2023 GLOBAL TRAVELLER RESEARCH PROGRAM

## SYNDICATED REPORT

### GERMANY MARKET OVERVIEW

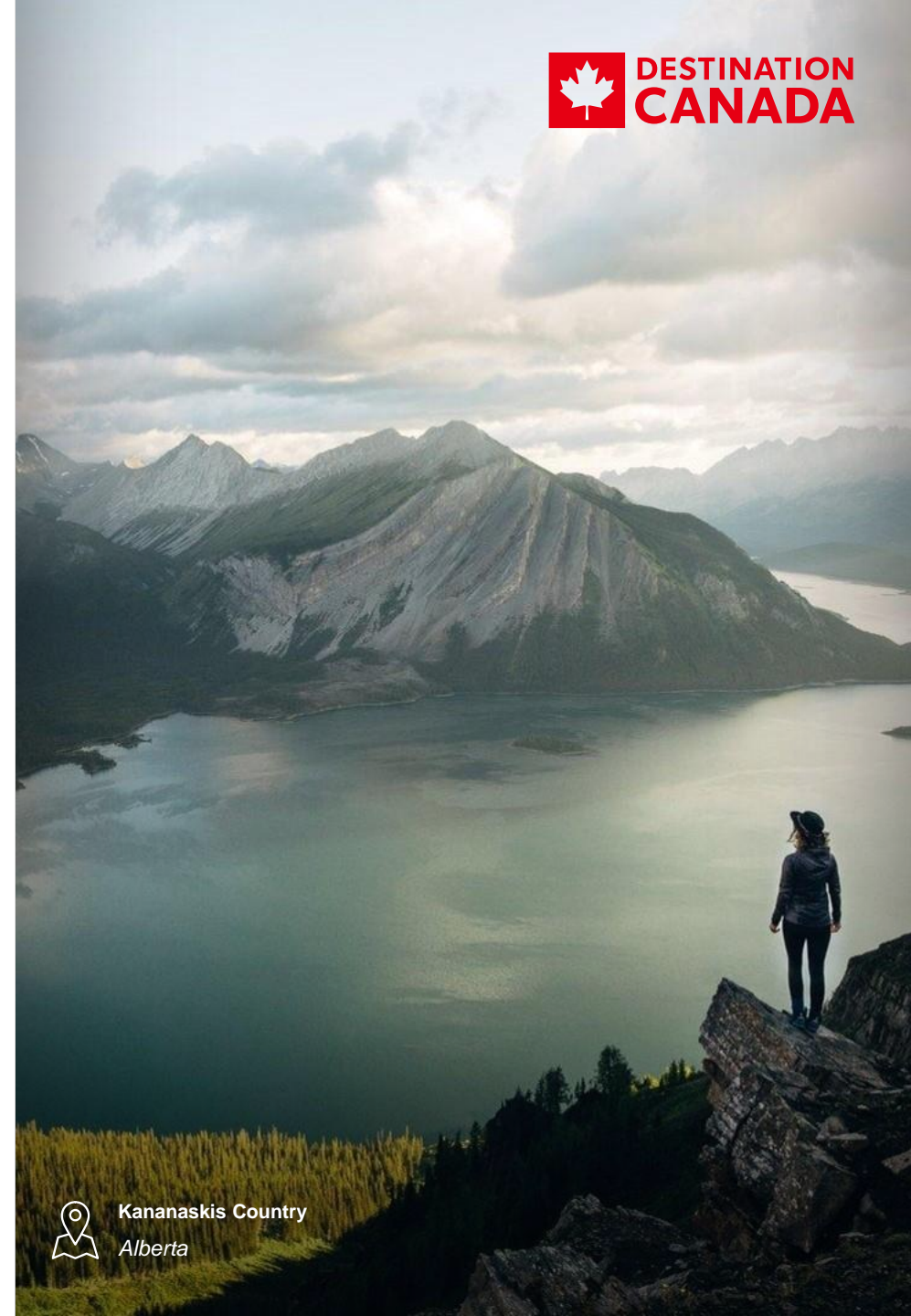


CANADIAN TOURISM DATA  
**collective**

# Germany Market Overview

*An annual view of the German market to help understand general trends towards travel and how Canada fares against competitors on key destination brand metrics.*

Please note that the insights in this report are drawn from two of YouGov's proprietary syndicated data products, **YouGov Global Travel Profiles** and **YouGov DestinationIndex**. As a result, access to and sharing of this report and its underlying data are restricted to those within Destination Canada's organization and among organizations with access to the Canadian Tourism Data Collective (CTDC).



Kananaskis Country  
Alberta


## YouGov® Global Travel Profiles

YouGov Global Travel Profiles (GTP) surveys consumers daily in 30 key travel origin markets, to help travel & tourism organizations identify who is ready to travel when, where they want to go and what kind of trip they are planning.




**Survey Start in Germany**

October 23, 2020



**Methodology Notes**

Attitudinal statements are integrated into YouGov Global Travel Profiles platform from another YouGov study. These questions have lower sample sizes than other variables.



**2023 Base Sizes**

Sample distribution: **National 18+**

Total Germany: **19,174**




## YouGov® DestinationIndex

**YouGov DestinationIndex** is an always-on destination brand tracker. Daily data enables you to spot sentiment changes in real-time and take action, while measuring and benchmarking performance. Track public perception of Canada and other destinations across 16 brand metrics to track destination brand health, inform strategy, and ultimately influence travellers' perception of Canada.




**Survey Start in Germany**

July 2, 2020



**Methodology Notes**

Maximum of 30 destinations shown to any panel member at any given time, with sample split accordingly as more than 30 destinations are tracked. Destinations are added to the tracker on an on-going basis.



**2023 Base Sizes**

Sample distribution: **National 18+**

Total Germany: **8,100 - 9,474**



# Syndicated Product Overview



## YouGov® Destination Index

### 16 key metrics

#### Engagement: Media & communication metrics

##### Advertising Awareness

- 1 Which of the following destinations have you seen an advertisement for in the PAST TWO WEEKS?

##### Aided Awareness

- 2 Which of the following destinations have you ever heard of? Please select all that apply.

##### Attention

- 3 Respondents hearing positive OR negative buzz about the destination.

##### Buzz

- 4 Over the PAST TWO WEEKS, which of the following destinations have you heard something POSITIVE about (whether in the news, through advertising, or talking to friends and family)? Now which of the following have you heard something NEGATIVE about over the PAST TWO WEEKS?

##### Word of Mouth Exposure

- 5 Which of the following destinations have you talked about with friends or family in the PAST TWO WEEKS (whether in-person, online, or through social media)?

#### Lower funnel metrics

##### Purchase Intent

- 6 Which of the proposed destinations are you most likely to visit?

##### Consideration

- 7 When you are in the market next to plan a vacation or a fun day out for yourself / your family, which destinations would you consider?

##### Recent Visitor (Current Customer)

- 8 Which of the following destinations have you visited in the past 12 months?

##### Former Visitor (Former Customer)

- 9 Which of the following destinations have you ever visited?

#### Destination / Brand health metrics

##### General Impression

- 10 Overall, of which of the following destinations do you have a POSITIVE impression? Now which of the following destinations do you have an overall NEGATIVE impression?

##### Visitor Satisfaction

- 11 Of which of the following destinations would you say that you are a "SATISFIED VISITOR"? Of which of the following destinations would you say that you are a "DISSATISFIED VISITOR"?

##### Quality

- 12 Which of the following destinations do you think have a GOOD QUALITY? Now which of the following destinations represents POOR QUALITY?

##### Value

- 13 Which of the following destinations do you think represents GOOD VALUE FOR MONEY? By that we don't mean 'cheap,' but that the destinations offer a visitor a lot in return for the price paid. Now which of the following destinations do you think represents POOR VALUE FOR MONEY? By that, we don't mean 'expensive,' but that the destinations do not offer a visitor much in return for the price paid.

##### Reputation

- 14 Which of the following destinations do you regard as having a GOOD reputation for vacations? Now which of the following destinations do you regard as having a POOR reputation for vacations?

##### Recommendation

- 15 Which of the following destinations would you RECOMMEND to a friend or colleague? And which of the following destinations would you tell a friend or colleague to AVOID?

##### Index (Overall Destination Health)

- 16 Average of Impression, Quality, Value, Reputation, Satisfaction & Recommend



## International travel is surging in Germany

- 56% are planning to travel internationally in the next year
- More are planning to travel abroad than domestically
- Consideration of most long-haul destinations is up



- *Wanderlust continues to grow in Germany, offering Canada a market that is hungry to travel the world*



## While willing to spend, likely driven by a stronger desire to travel internationally, economic factors are becoming a concern

- 77% are excited to generally spend more while travelling
- However, fewer trips are being planned and mentions of price of travel and accommodation as travel obstacles have increased
- Overall value for money is top destination choice influence



- *Given economic factors influencing German travellers, Canada can capitalize by highlighting exceptional value for money, aligning with their price sensitive yet eager travel behaviour*



## Variety in experiences can help draw German travellers

- Love of cultural and learning experiences
- Almost two in five mention climate and natural beauty as destination choice influences
- Beach (relaxing), combined relaxing and sightseeing and city breaks are favourite types of trips



- *Highlighting Canada's diverse cultural and learning experiences, its vibrant cities along with its natural beauty could resonate with German travellers' interest in varied travel experiences*



## Competitive market could require continuous investment

- Consideration and ad recall up across the competitive set
- Canada ranks first in overall destination health, reputation and positive buzz
- Social media is the top mentioned advertising channel, but Germans cite many channels as effective




- *In a competitive market, sustaining high consideration and positive buzz for Canada may necessitate ongoing investment and marketing mix optimization. Leveraging Canada's established reputation could aid in conversion*



# Germany Market Overview



 Peggy's Cove  
Nova Scotia



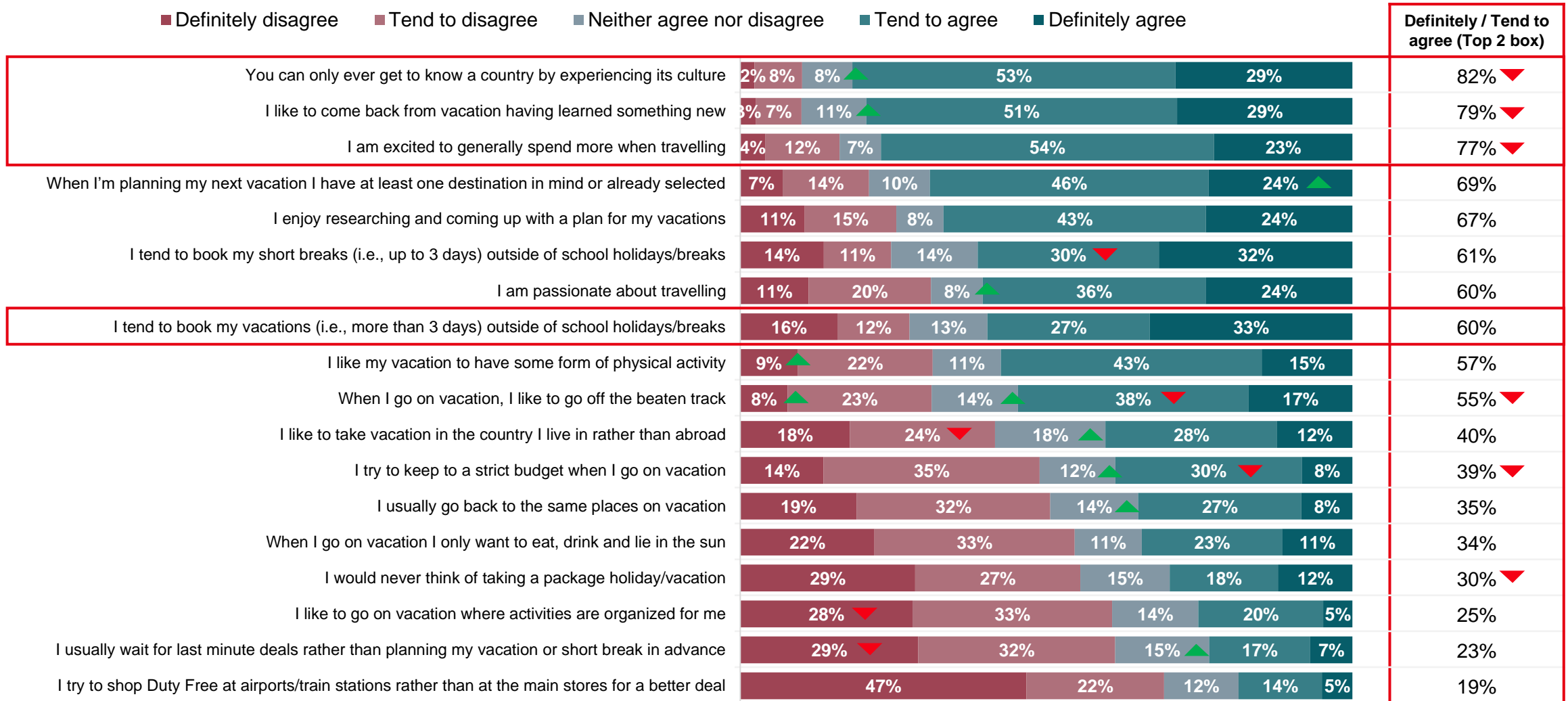
# Attitudes Towards Travel



**Despite declines compared to 2022, Germans still prioritize cultural and learning experiences during travel, with many excited to spend more when travelling. Many prefer booking vacations outside school holidays, possibly to manage costs and allocate more spending during their trips**

■ Definitely disagree ■ Tend to disagree ■ Neither agree nor disagree ■ Tend to agree ■ Definitely agree

Definitely / Tend to agree (Top 2 box)





# Trip Types Planned in Next 12 Months

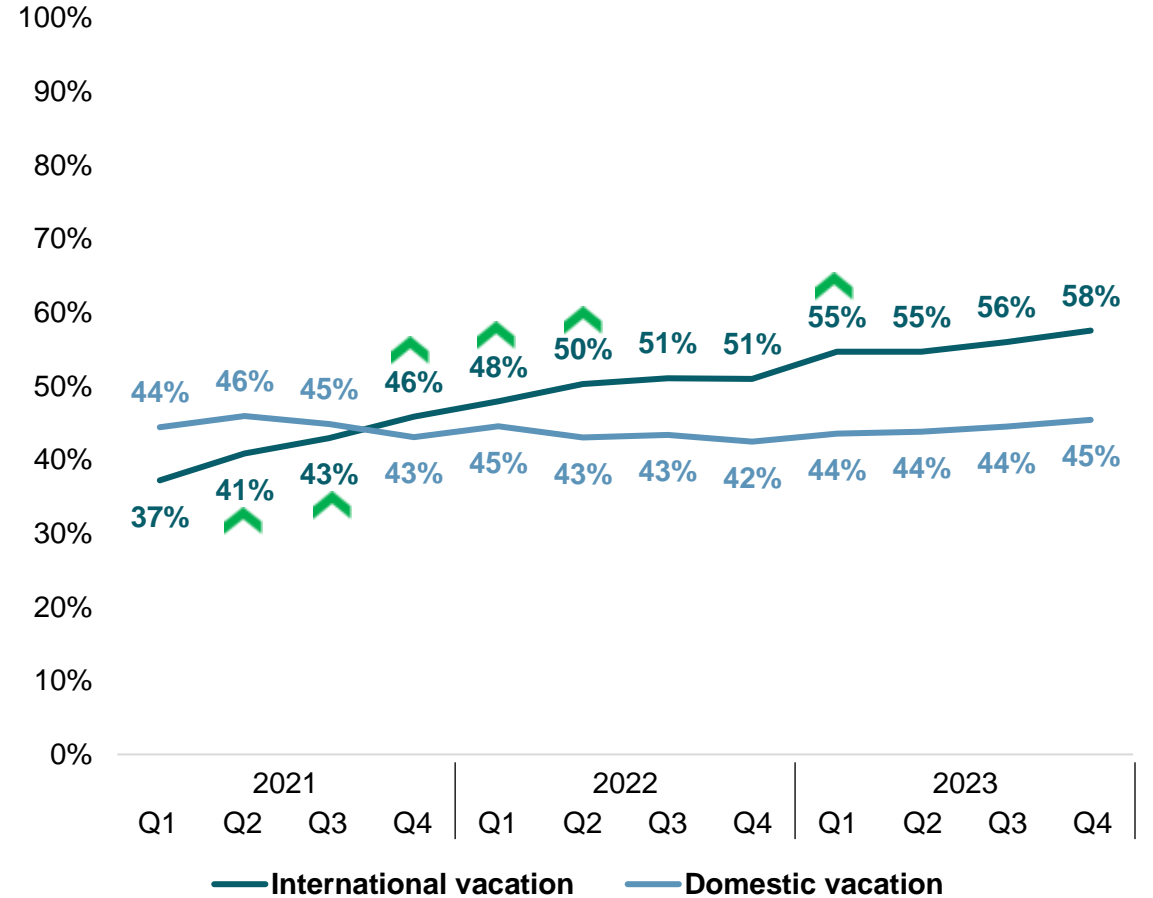


*Incidence of planned international vacations has surged over the last three years and now leads planned domestic vacations by over ten percentage points*

## Trip Types Planned in Next 12 Months



## Vacation Trips Planned in Next 12 Months (Trended)



9 2023 Base: German 18+ (n=19,174)  
 2021-2023 Quarterly Trending Base Range: German 18+ (n=4,542-5,247)  
 Q: Which, if any, of the following trips are you planning to take in the next 12 months?  
 Please select all that apply.

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

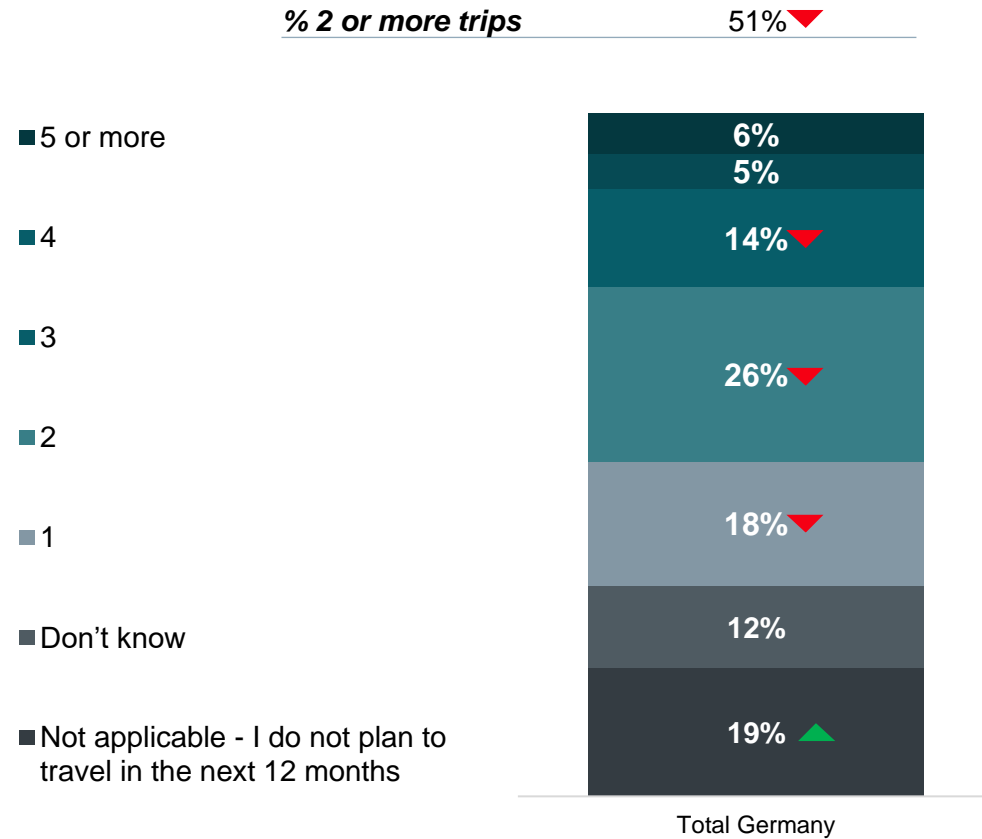


# Number of Trips Planned in Next 12 Months

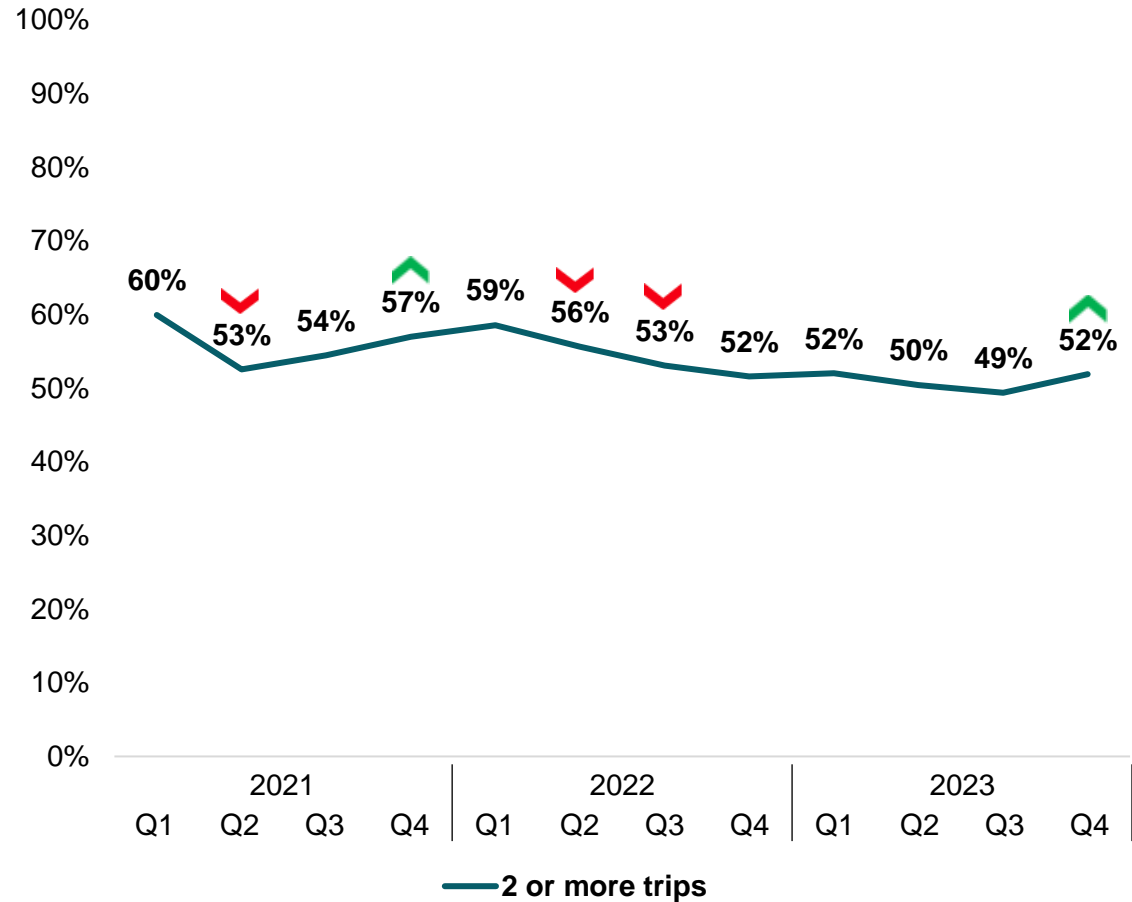


While incidence of planned international vacations has grown significantly, Germans are planning fewer trips than in years past

## Number of Trips Planned



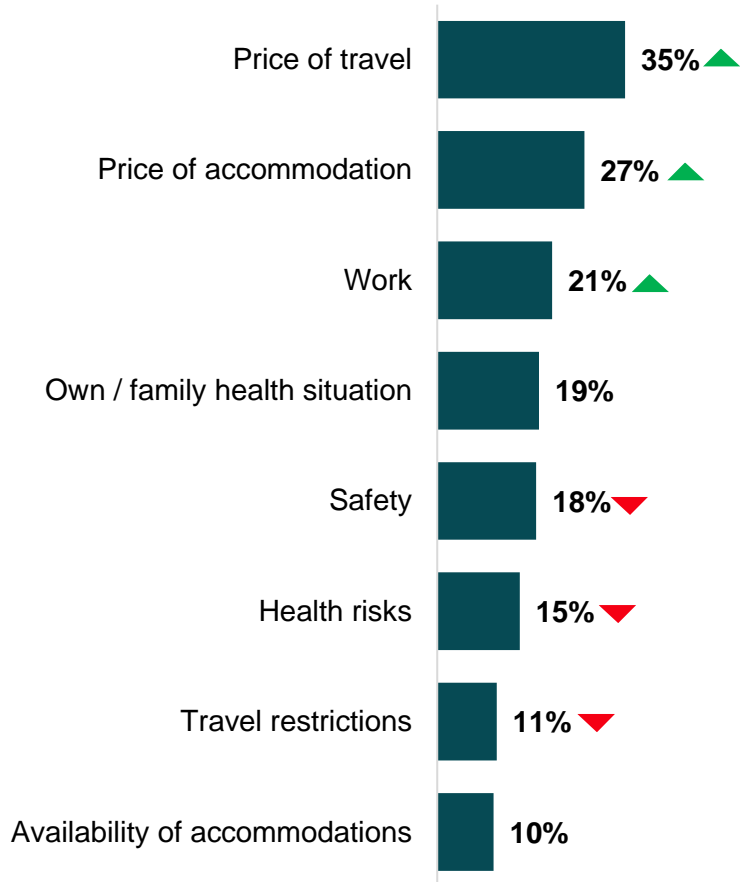
## Number of Trips Planned (Trended)



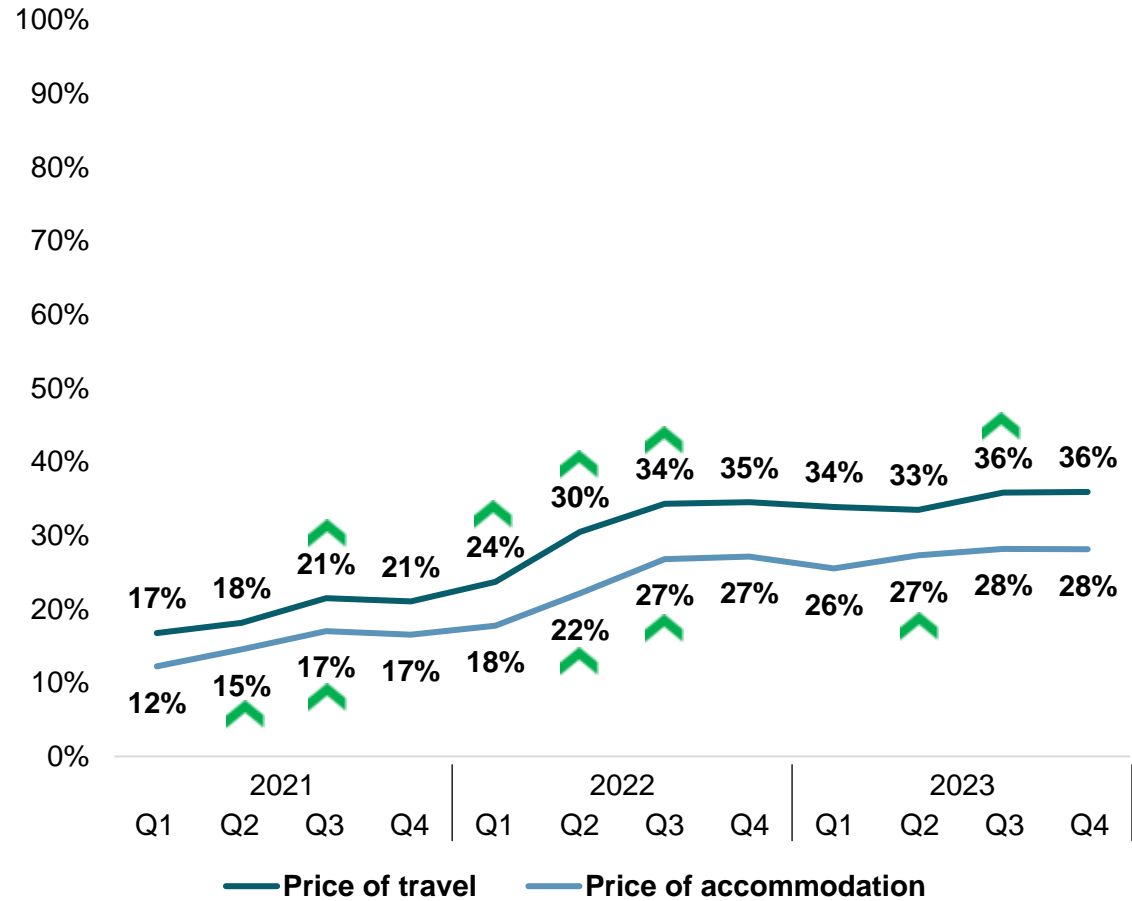
# Factors Preventing Travel

The rising price of travel may be impeding Germans' ability to travel, as mentions of price of travel and accommodation have increased for the second straight year

## Factors Preventing Travel



## Select Factors Preventing Travel (Trended)

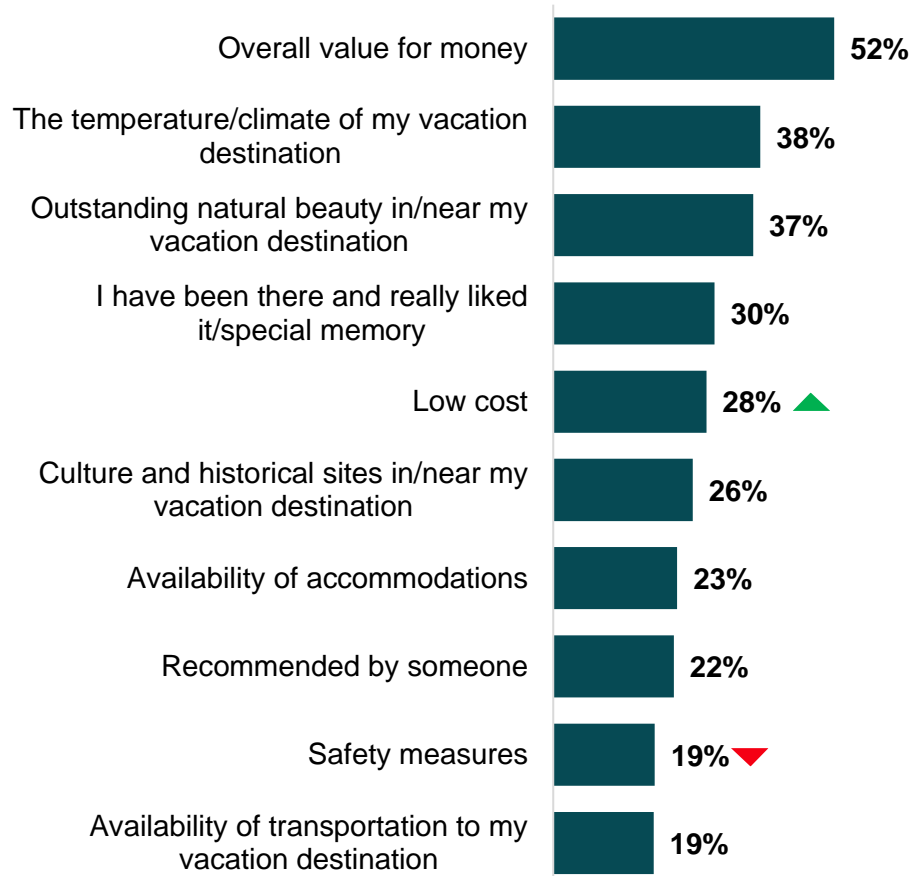


# Destination Choice Influences

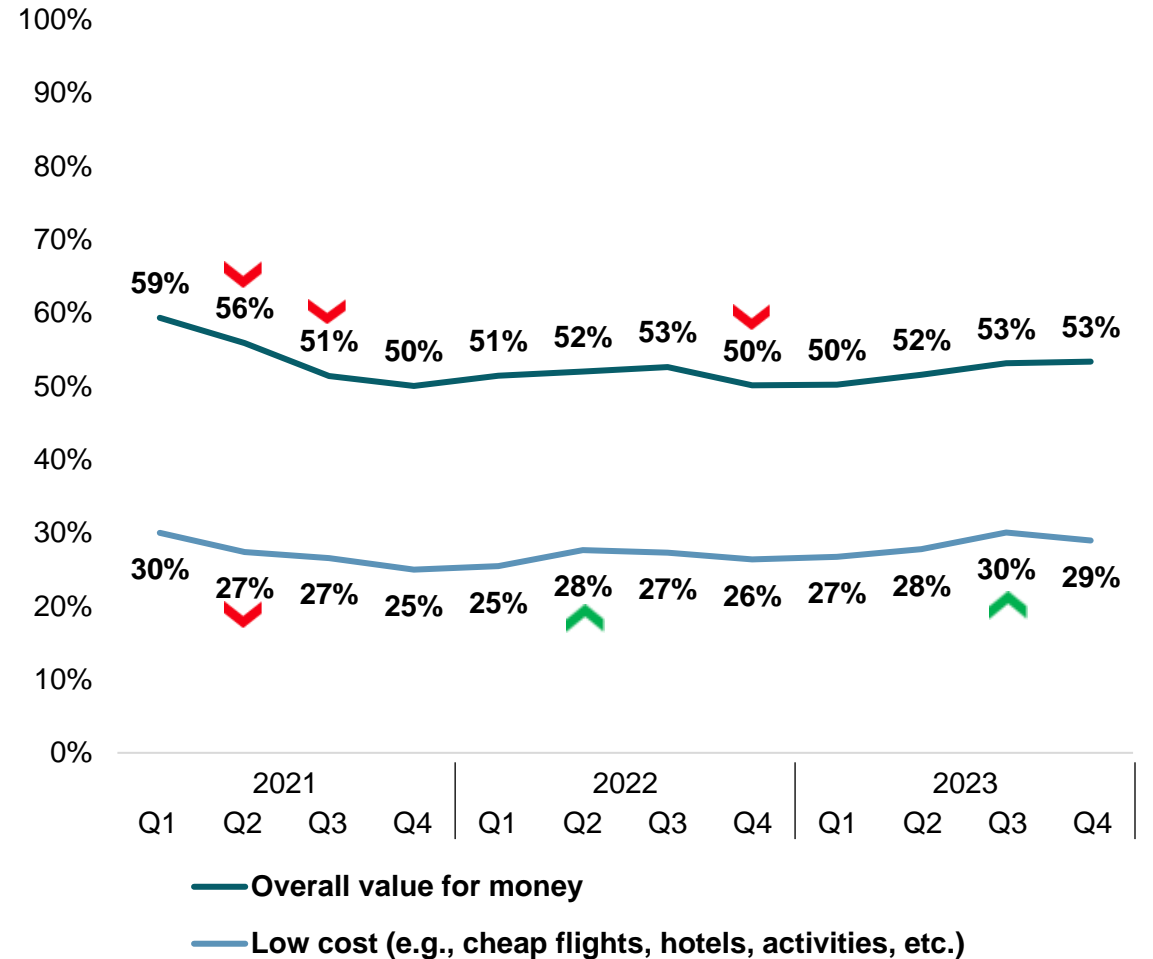


Half of Germans mention overall value for money as a factor influencing destination choice and mentions of low cost have increased year-over-year. Climate and natural beauty are also mentioned by almost two in five Germans

## Destination Choice Influences (Top Responses)



## Select Destination Choice Influences (Trended)



12 2023 Base: German 18+ (n=19,174)  
 2021-2023 Quarterly Trending Base Range: German 18+ (n=4,542-4,962)  
 Q: Thinking of your most recent vacation, which, if any, of the following influenced your choice of destination? Please choose all that apply.

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

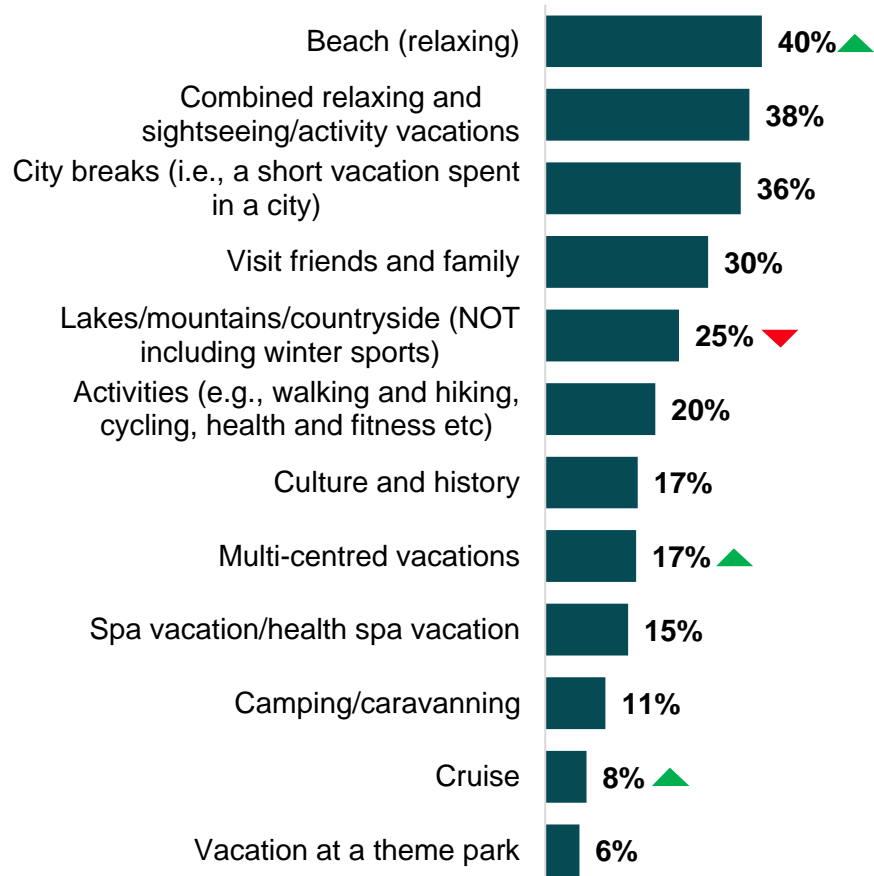


# Favourite Types of Vacations

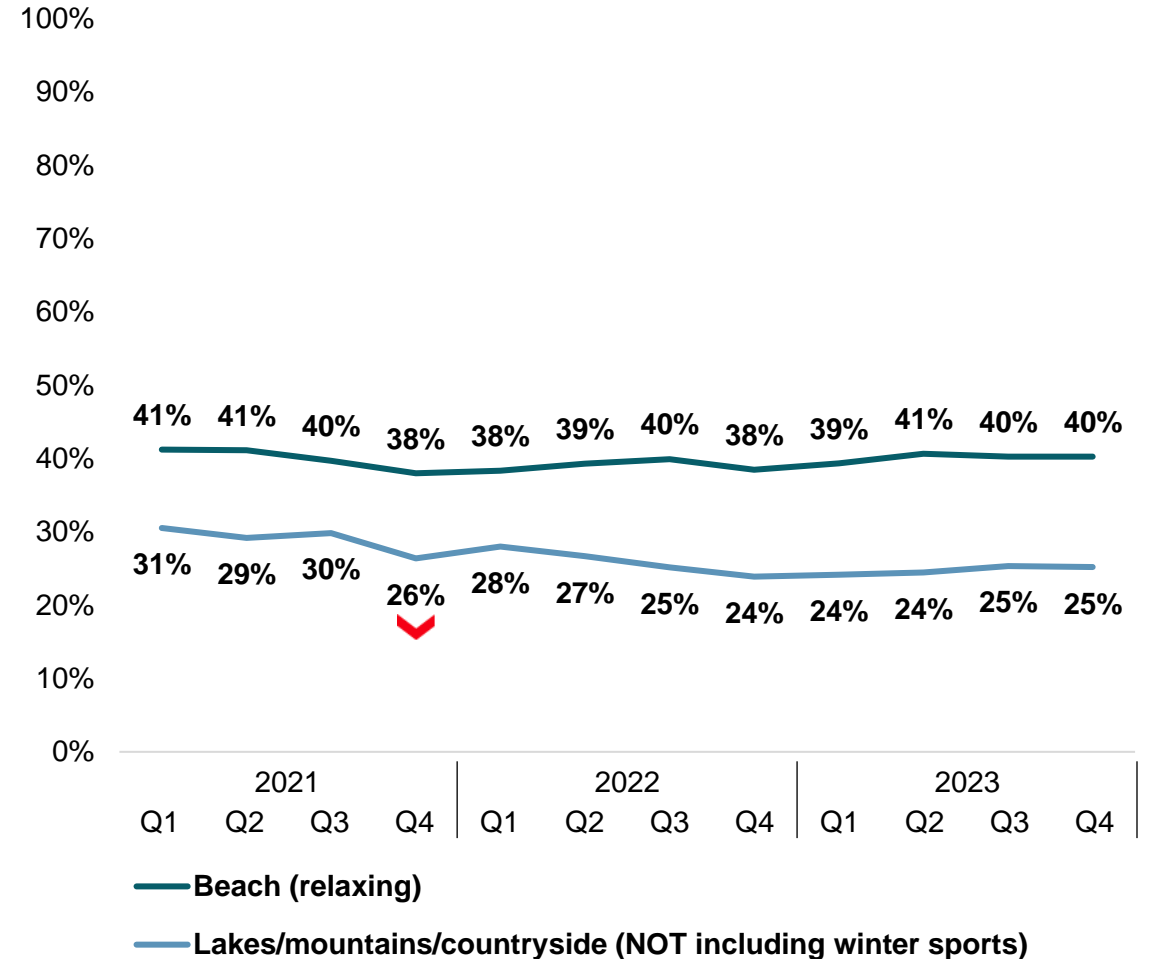


Germans enjoy variety, as combined relaxing and sightseeing vacations ranks as the second most mentioned type of trip; beach and city-centric vacations also rank within the top three. Mentions of nature vacations are down for the second consecutive year

## Favourite Types of Vacations (Top Responses)



## Select Favourite Types of Vacations (Trended)



2023 Base: German 18+ (n=19,174)  
 2021-2023 Quarterly Trending Base Range: German 18+ (n=4,586-4,962)  
 Q: Thinking more generally about the vacations that you go on, not just those that you have taken in the last 12 months, which, if any, of the following types of vacations do you typically take? Please select all that apply.



# Vacation Planning Methods

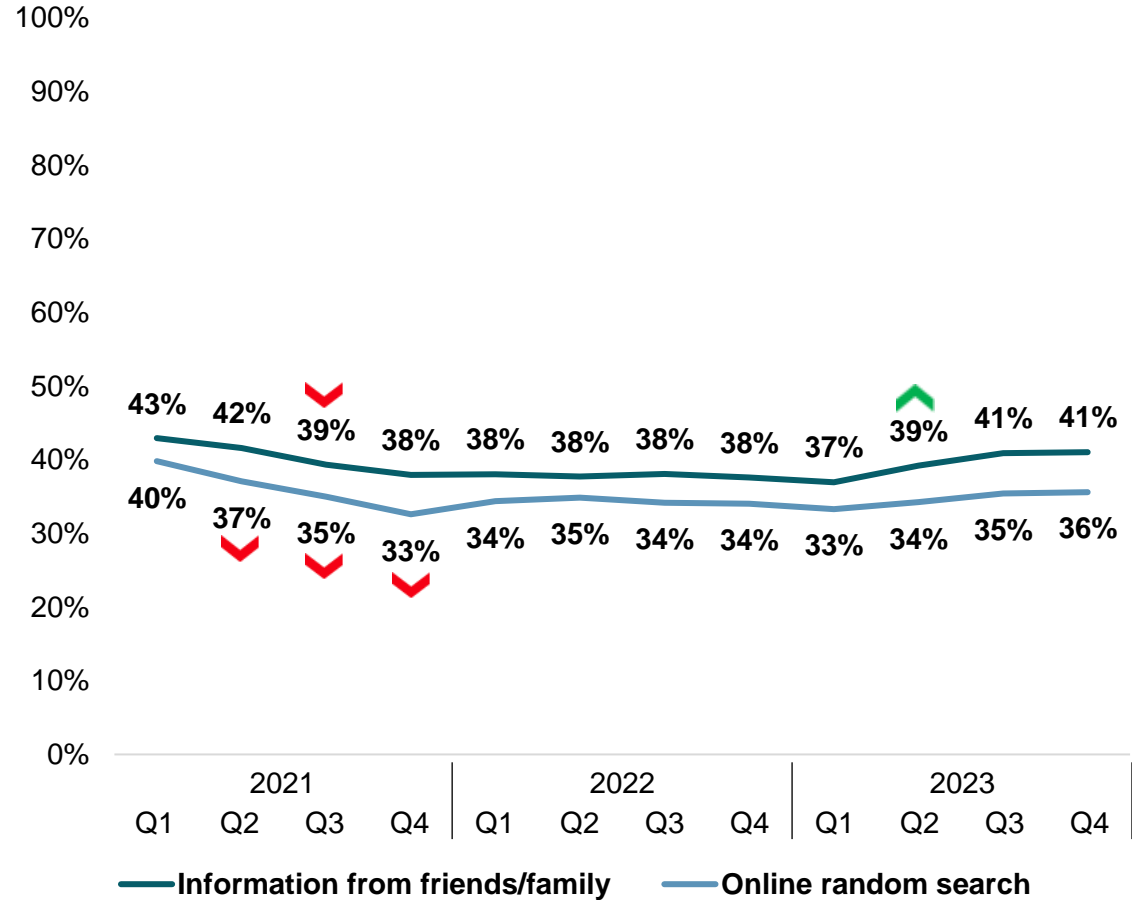


An increasing number of Germans are relying on information from friends and family when planning vacations. Online search is used by more than one third of Germans.

## Vacation Planning Methods



## Select Vacation Planning Methods (Trended)

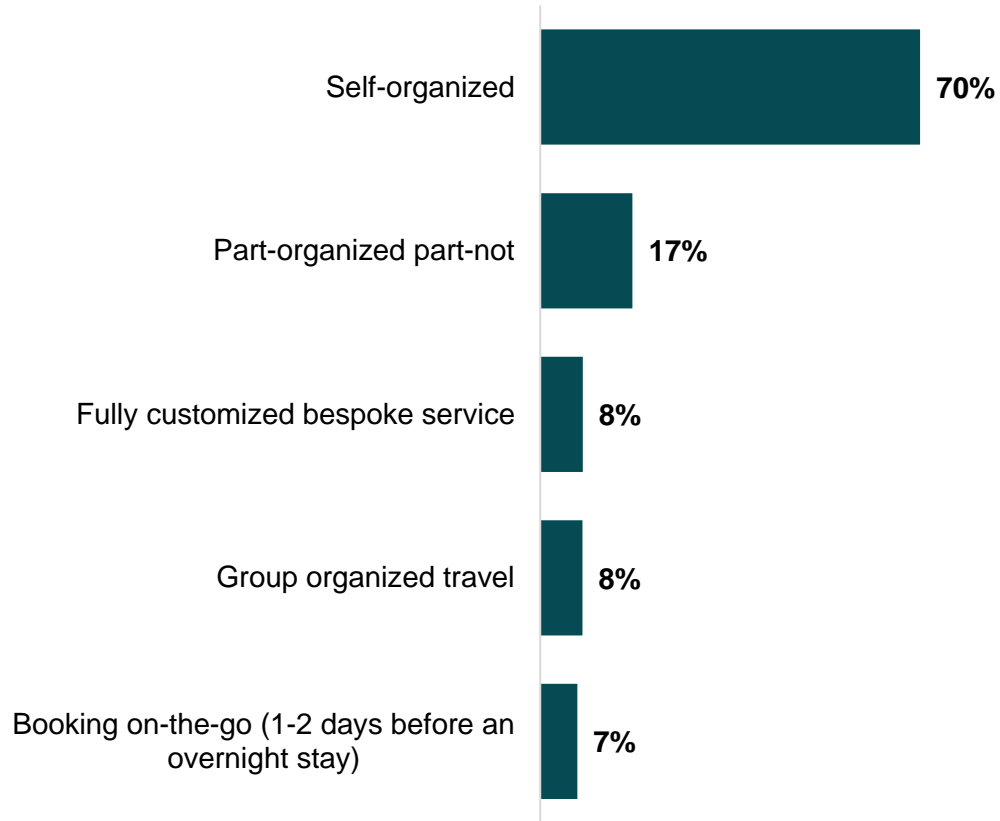


# Vacation Organization Habits

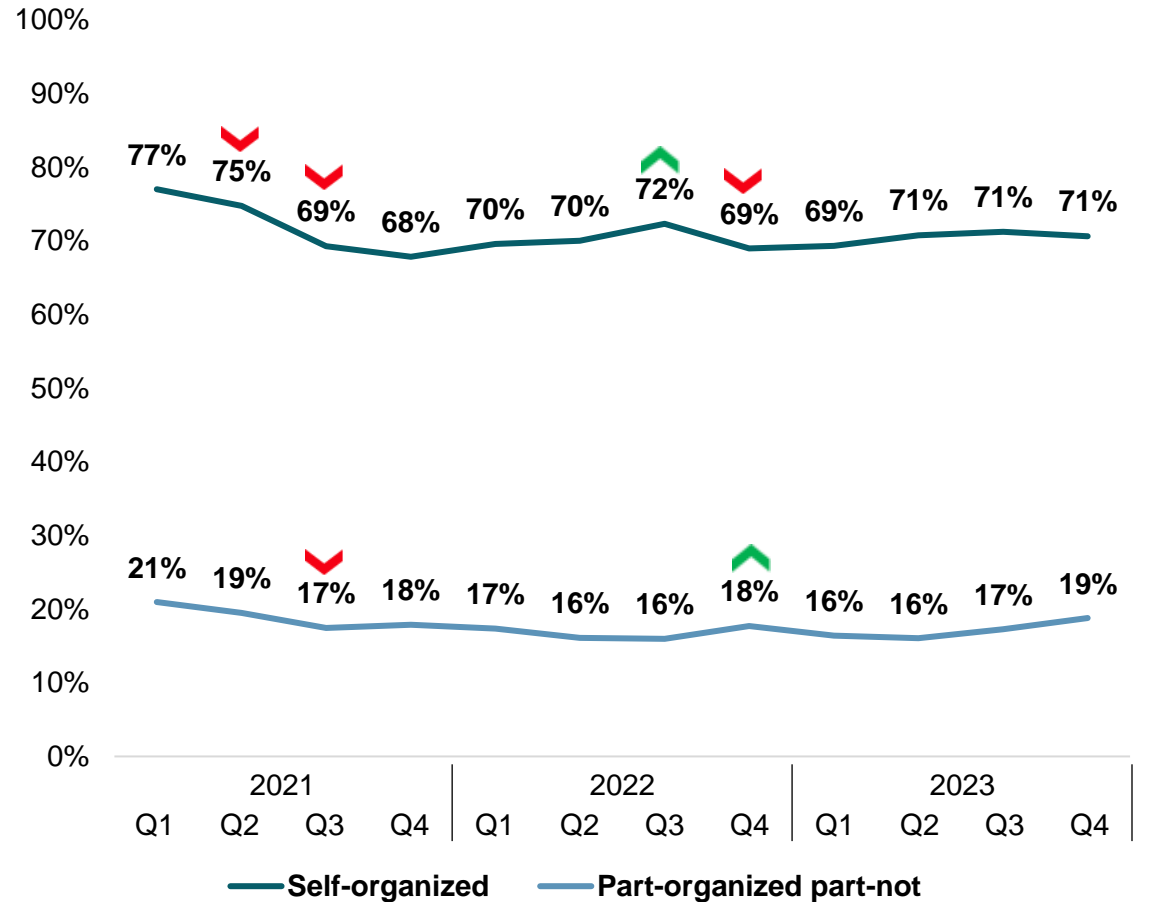
The vast majority of Germans organize their vacations themselves



## Vacation Organization Habits



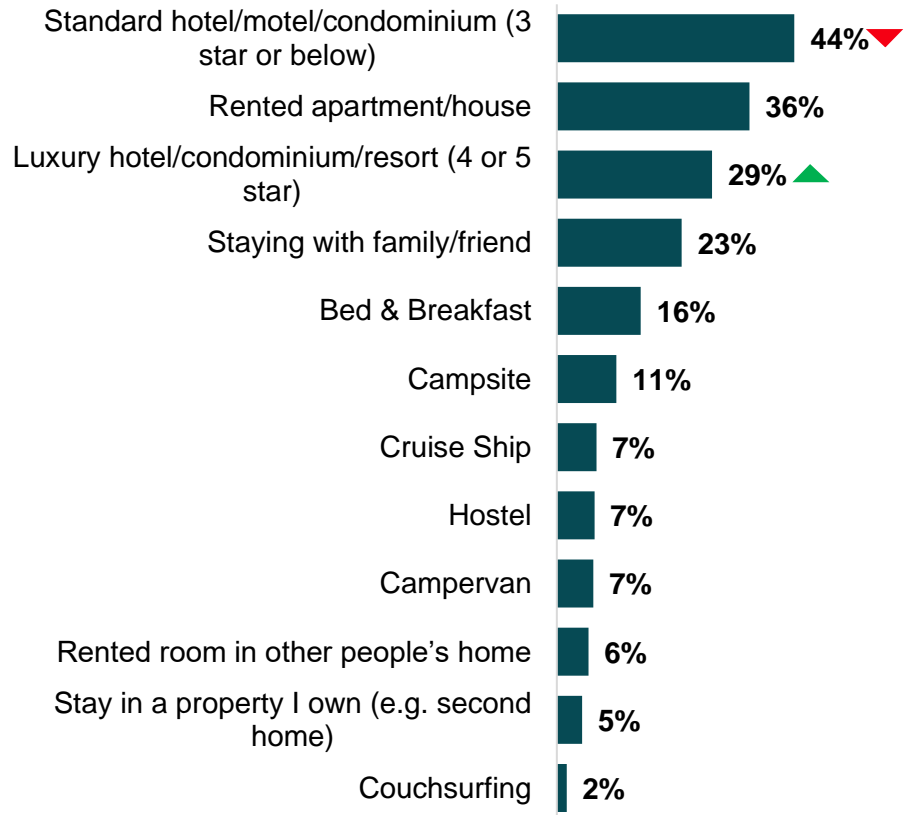
## Select Vacation Organization Habits (Trended)



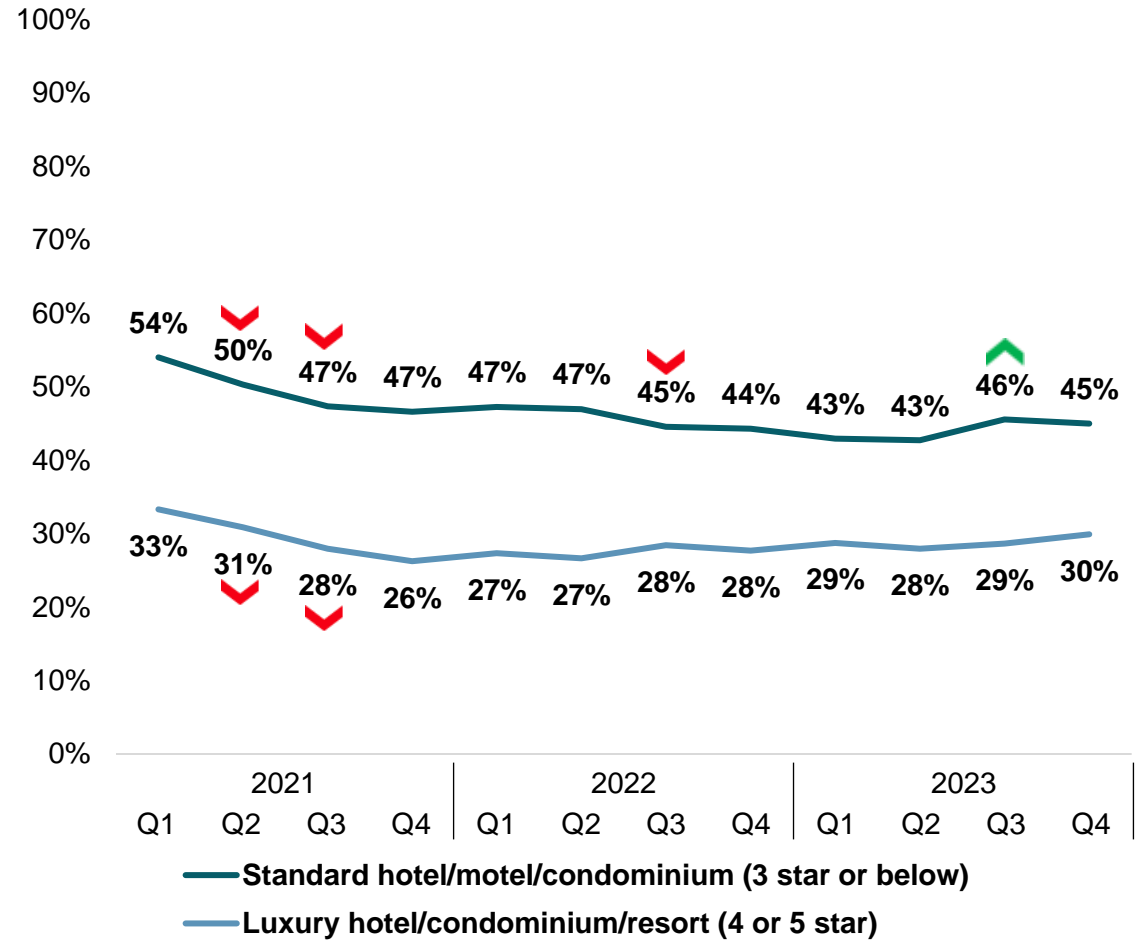
# Accommodation Type Typically Stayed At

While on the decline, standard hotels remain the most used type of accommodation. Use of luxury hotels increased in 2023 yet remains down compared to 2021 results and trails mentions of vacation rentals

## Accommodation Type Typically Stayed At



## Select Accommodation Types (Trended)





# Accommodation Booking Methods

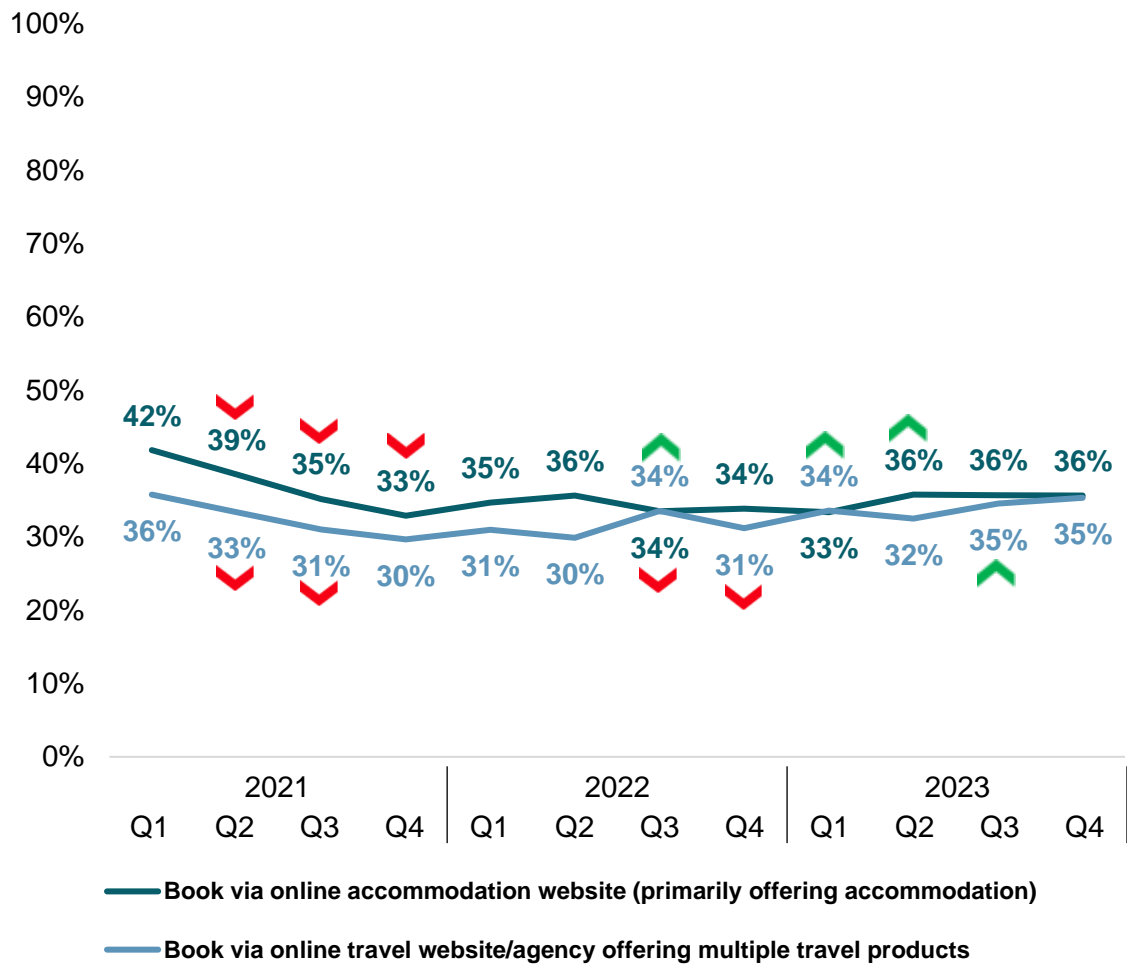


Roughly half of Germans use third-party sites when booking accommodation, with travel aggregators seeing growth in 2023

## Accommodation Booking Methods



## Select Accommodation Booking Methods (Trended)



2023 Base: German 18+ (n=19,174)  
 2021-2023 Quarterly Trending Base Range: German 18+ (n=4,542-4,962)  
 Q: Which, if any, of the following booking methods do you typically use when booking accommodation for vacations?

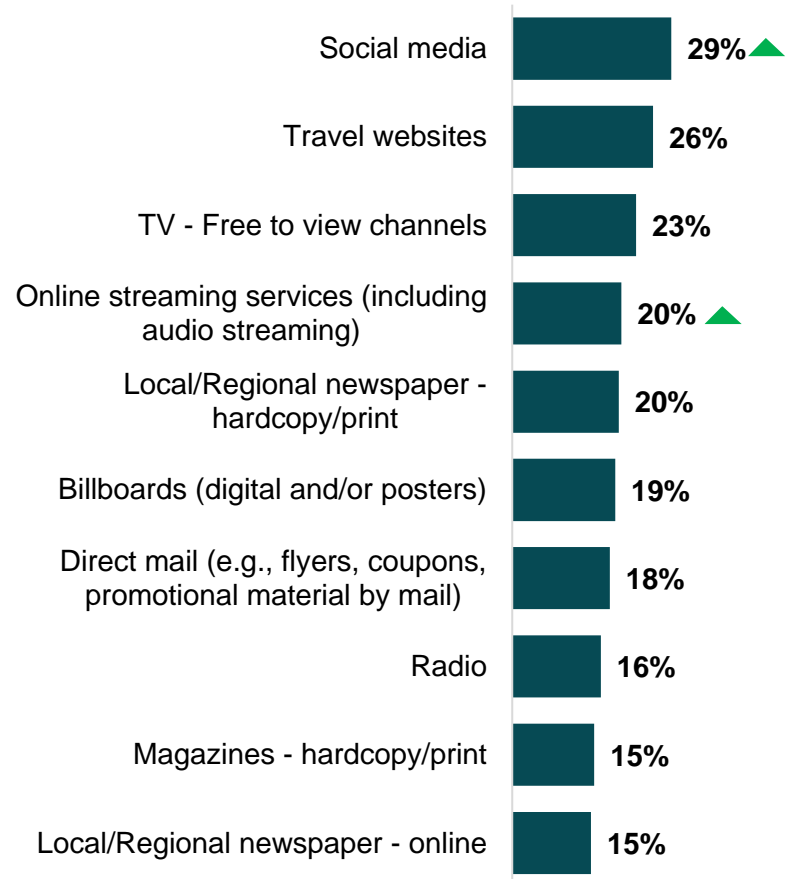


# Effective Types of Travel Advertising

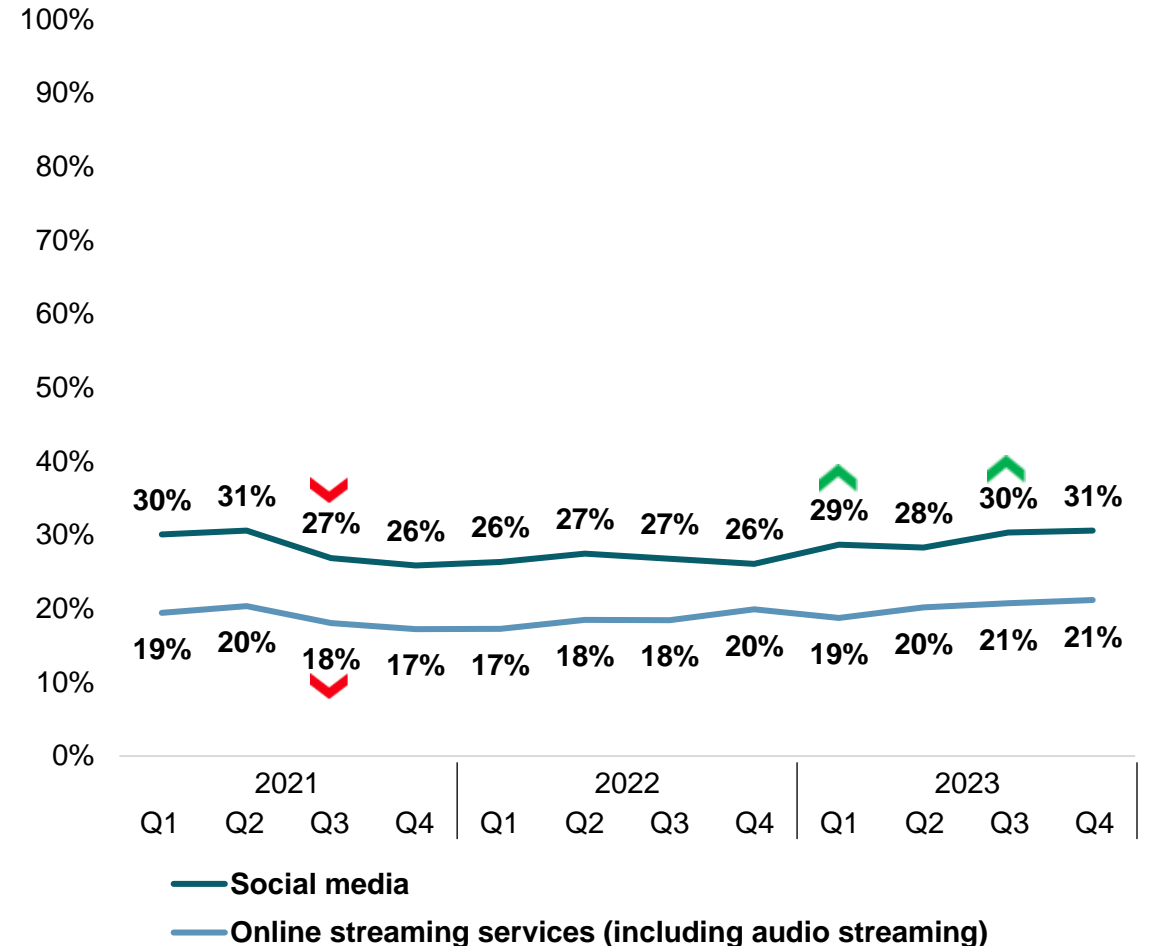


Mentions of social media and online streaming services as effective advertising channels increased in 2023. Travel websites, broadcast TV and print are also among the top mentions

## Effective Types of Travel Advertising (Top Responses)



## Select Types of Travel Advertising (Trended)



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





# Performance of Canada in 2023 vs. Competitors



Yellowknife  
Northwest Territories



# Performance Scorecard for Canada

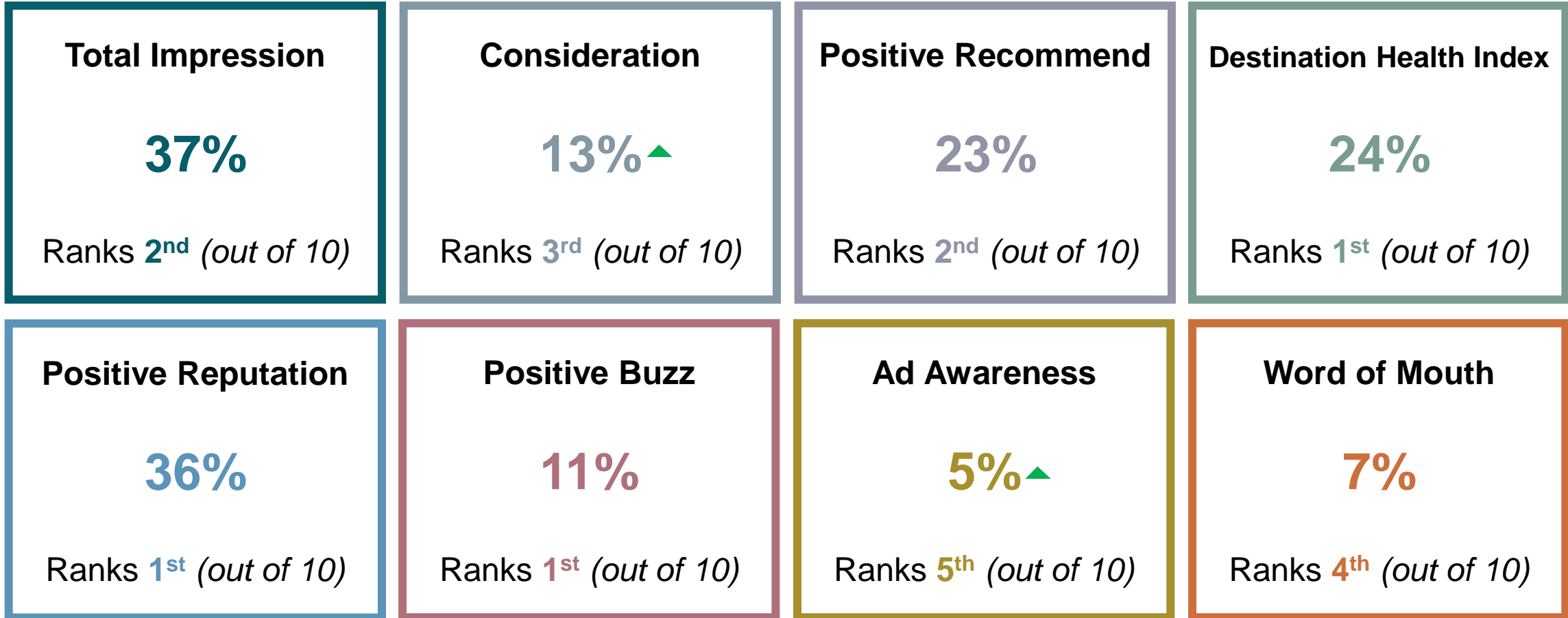
Metric		Definition		Question Text
<b>Total Impression</b>	→	The degree to which consumers feel they know and understand a brand, beyond just being aware of its existence. Total impression = positive + negative impression	→	Overall, of which of the following destinations do you have a <b>POSITIVE</b> impression? / Now which of the following destinations do you have an overall <b>NEGATIVE</b> impression?
<b>Consideration</b>	→	The number of consumers who would consider the destination when they are next in market to plan a vacation.	→	When you are in the market next to plan a vacation or a fun day out for yourself / your family, which destinations would you consider?
<b>Positive Recommend</b>	→	How likely consumers are to recommend a destination to a friend or colleague.	→	Which of the following destinations would you <b>RECOMMEND</b> to a friend or colleague?
<b>Destination Health Index</b>	→	Overall measure of a destination's brand health across several key destination health metrics.	→	Average of Positive Impression, Positive Reputation, Positive Quality, Positive Value, Positive Satisfaction, Positive Recommend
<b>Positive Reputation</b>	→	How much consumers like and respect a destination.	→	Which of the following destinations do you regard as having a <b>GOOD</b> reputation for vacations?
<b>Positive Buzz</b>	→	How much positive news coverage consumers are hearing about a destination.	→	Over the <b>PAST TWO WEEKS</b> , which of the following destinations have you heard something <b>POSITIVE</b> about (whether in the news, through advertising, or talking to friends and family)?
<b>Ad Awareness</b>	→	How much advertising consumers have seen for a destination.	→	Which of the following destinations have you seen an advertisement for in the <b>PAST TWO WEEKS</b> ?
<b>Word of Mouth</b>	→	How much consumers are talking about a destination.	→	Which of the following destinations have you talked about with friends and family in the <b>PAST TWO WEEKS</b> (whether in-person, online, or through social media)?



# Performance Scorecard for Canada



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



# 2023 Annual Scores



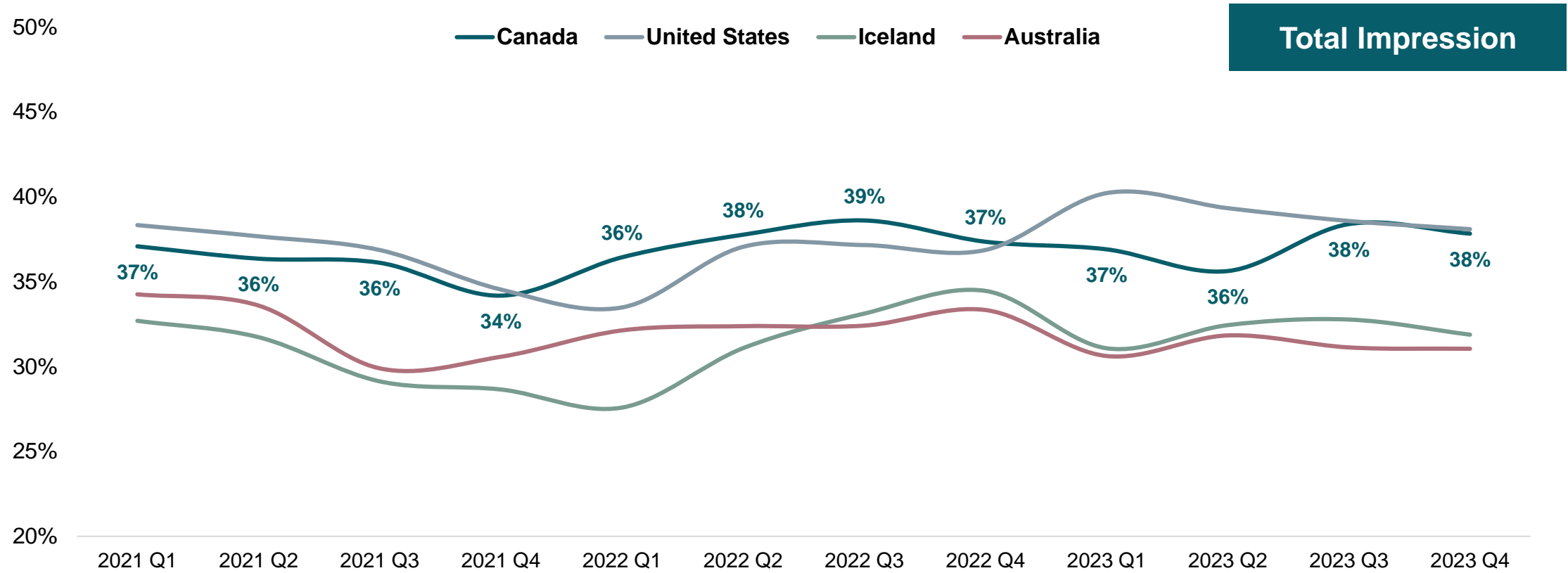
Scores across the competitive set increased in 2023, as the incidence of planned international travel continued to surge. While Canada saw an increase in consideration and ad awareness, competitors experienced the same growth in those metrics as well as multiple others

	Canada	US	Iceland	Thailand	Japan	Australia	Mexico	UAE	India	China
Total Impression	37%	39% ▲	32%	28% ▲	26%	31%	23%	30% ▲	20%	27% ▼
Consideration	13% ▲	15% ▲	13% ▲	10% ▲	8% ▲	8% ▲	6%	4% ▲	3%	2% ▲
Positive Recommend	23%	23% ▲	20%	17% ▲	14%	18%	10% ▲	9% ▲	5%	5% ▲
Destination Health Index	24%	23% ▲	20%	19% ▲	15% ▲	20%	10%	10% ▲	5%	5% ▲
Positive Reputation	36%	29% ▲	30%	28% ▲	20% ▲	33%	13%	15% ▲	5%	4% ▲
Positive Buzz	11%	11% ▲	11% ▲	10% ▲	9% ▲	8%	5%	5% ▲	3% ▲	2% ▲
Ad Awareness	5% ▲	7% ▲	5% ▲	6% ▲	3% ▲	4%	2%	8% ▲	2% ▲	1% ▲
Word of Mouth	7%	14% ▲	7% ▲	10% ▲	7% ▲	6%	4%	5%	4% ▲	4% ▼

# Total Impression: Positive + Negative Impression (Trended)



Canada and the US swapped rankings in 2023, as the US overtook Canada in total impression



**Total Impression**

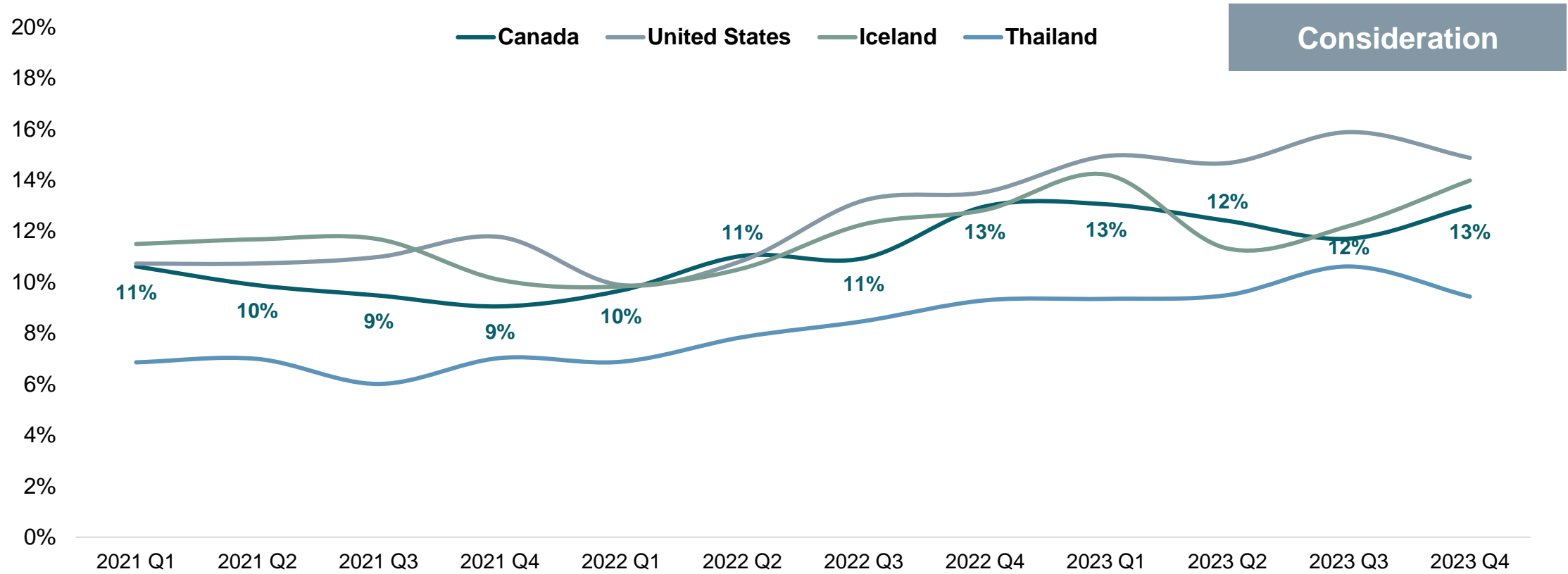
	2021 Q1	2021 Q2	2021 Q3	2021 Q4	2022 Q1	2022 Q2	2022 Q3	2022 Q4	2023 Q1	2023 Q2	2023 Q3	2023 Q4
<b>Canada's Rank</b>	#2	#2	#2	#2	#1	#1	#1	#1	#2	#2	#2	#2
<b>Top Ranked Destination</b>	US	US	US	US	Canada	Canada	Canada	Canada	US	US	US	US

23 2021-2023 Quarterly Trending Base Range: German 18+ (n=1,785-2,443)  
 Q: Overall, of which of the following destinations do you have a POSITIVE impression? / Now which of the following destinations do you have an overall NEGATIVE impression?



# Consideration (Trended)

As long-haul travel surged post-pandemic, consideration of Canada as well as most destinations within the competitive set increased in 2023



	2021 Q1	2021 Q2	2021 Q3	2021 Q4	2022 Q1	2022 Q2	2022 Q3	2022 Q4	2023 Q1	2023 Q2	2023 Q3	2023 Q4
<b>Canada's Rank</b>	#3	#3	#3	#3	#3	#1	#3	#2	#3	#2	#3	#3
<b>Top Ranked Destination</b>	Iceland	Iceland	Iceland	US	US	Canada	US	US	US	US	US	US

24 2021-2023 Quarterly Trending Base Range: German 18+ (n=1,785-2,443)  
 Q: When you are in the market next to plan a vacation or a fun day out for yourself / your family, which destinations would you consider?



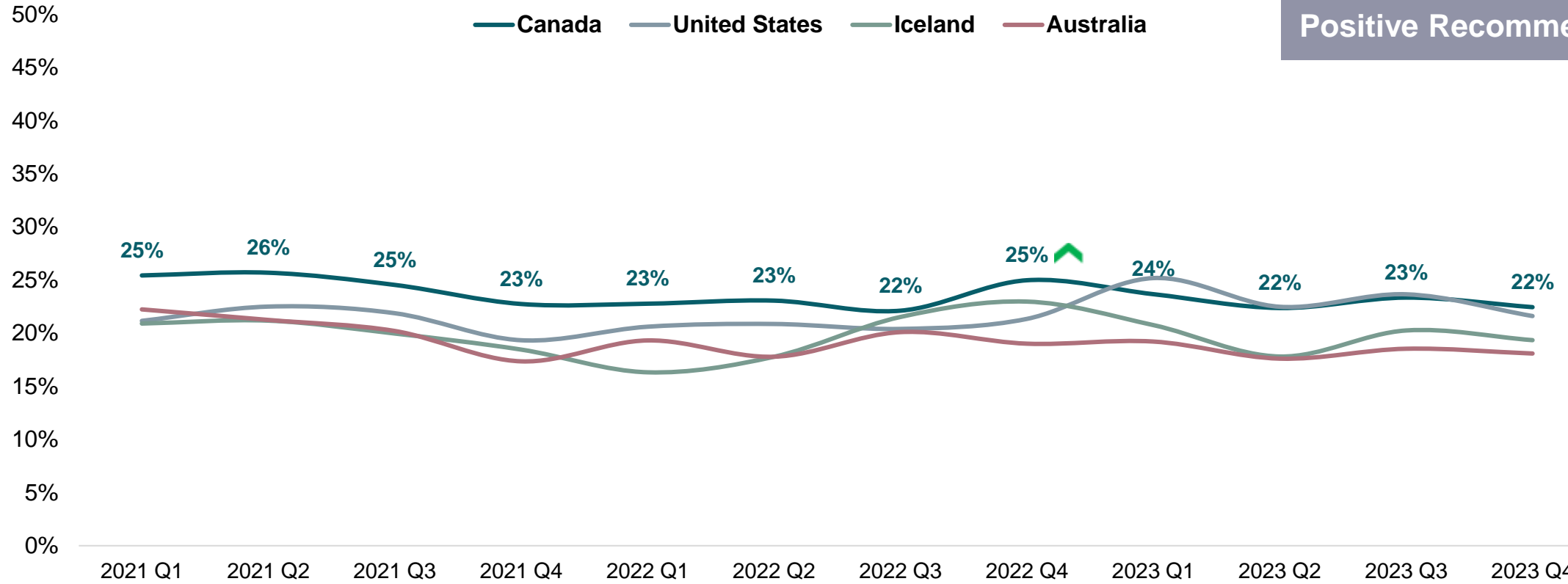


# Positive Recommend (Trended)



More Germans are recommending the US as a travel destination, as the US lead Canada marginally on this metric in 2023

Positive Recommend



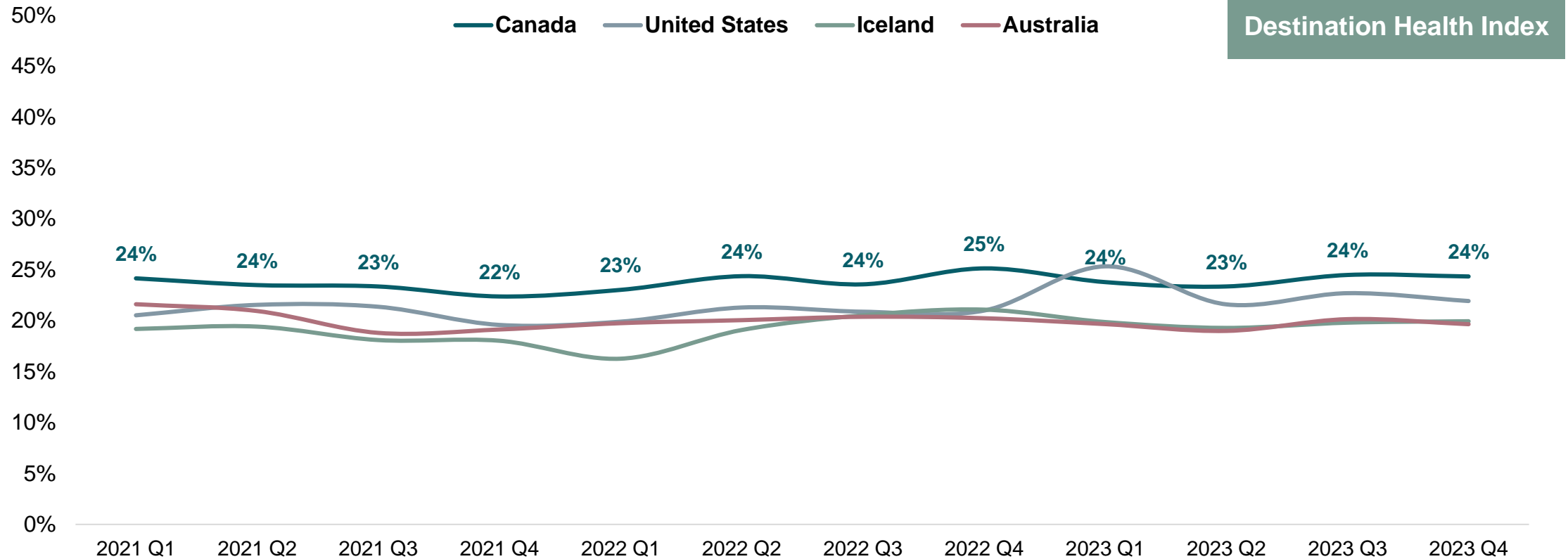
	2021 Q1	2021 Q2	2021 Q3	2021 Q4	2022 Q1	2022 Q2	2022 Q3	2022 Q4	2023 Q1	2023 Q2	2023 Q3	2023 Q4
<b>Canada's Rank</b>	#1	#1	#1	#1	#1	#1	#1	#1	#2	#2	#2	#1
<b>Top Ranked Destination</b>	Canada	Canada	Canada	Canada	Canada	Canada	Canada	Canada	US	US	US	Canada



# Destination Health Index (Trended)



Canada often ranks as the top destination in overall destination health; however its lead is waning as the US and other competitors have seen scores increase in 2023



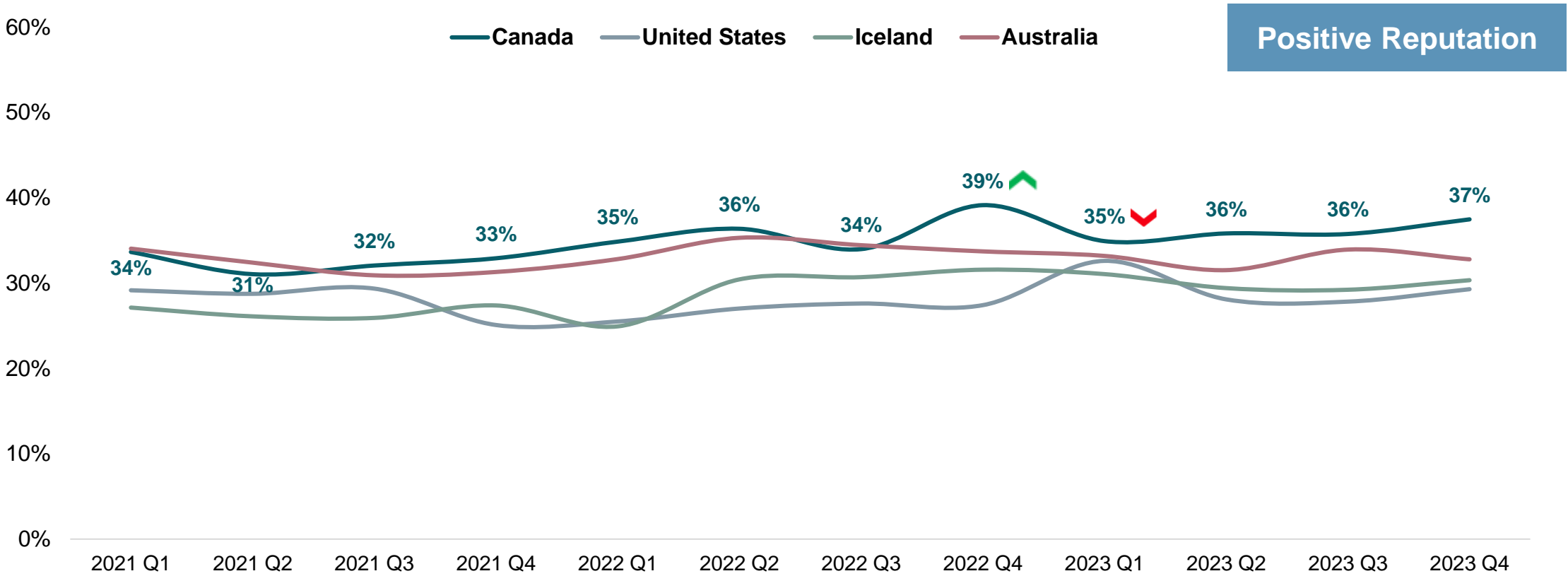
	2021 Q1	2021 Q2	2021 Q3	2021 Q4	2022 Q1	2022 Q2	2022 Q3	2022 Q4	2023 Q1	2023 Q2	2023 Q3	2023 Q4
<b>Canada's Rank</b>	#1	#1	#1	#1	#1	#1	#1	#1	#2	#1	#1	#1
<b>Top Ranked Destination</b>	Canada	Canada	Canada	Canada	Canada	Canada	Canada	Canada	US	Canada	Canada	Canada



# Positive Reputation (Trended)



Despite competitor score increases, Canada continues to lead the competitive set in reputation, with over one in three Germans mentioning that Canada has a good reputation for vacations



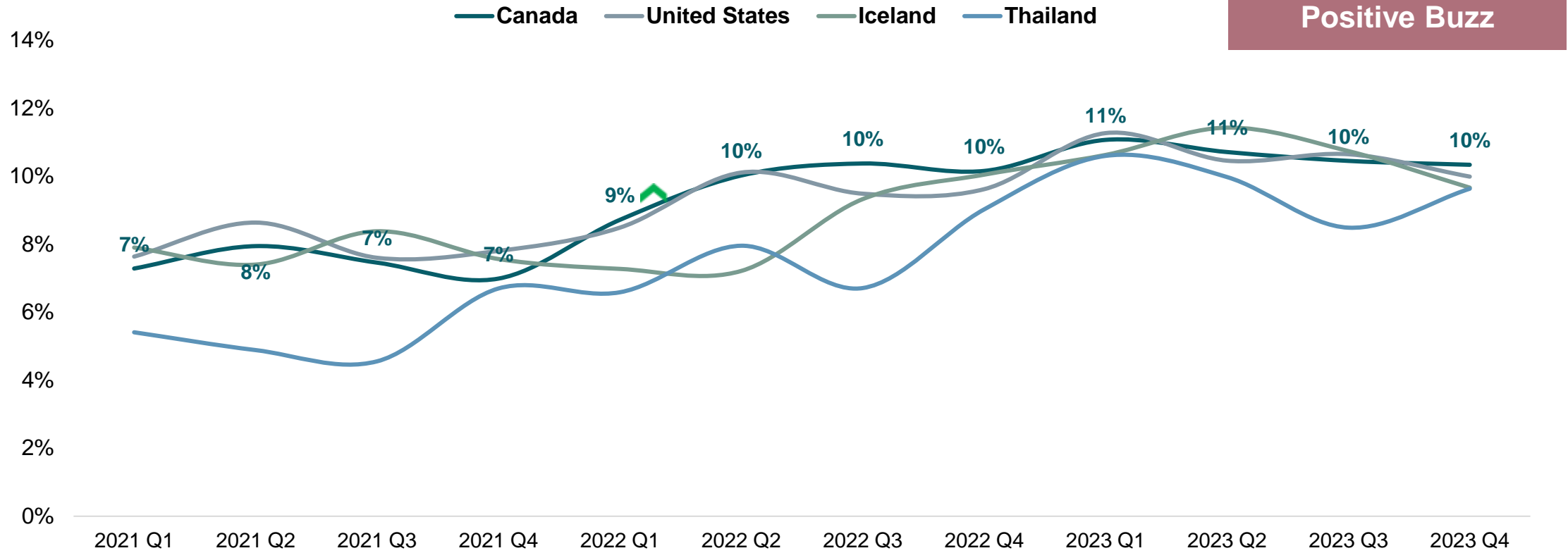
	2021 Q1	2021 Q2	2021 Q3	2021 Q4	2022 Q1	2022 Q2	2022 Q3	2022 Q4	2023 Q1	2023 Q2	2023 Q3	2023 Q4
<b>Canada's Rank</b>	#2	#2	#1	#1	#1	#1	#2	#1	#1	#1	#1	#1
<b>Top Ranked Destination</b>	Australia	Australia	Canada	Canada	Canada	Canada	Australia	Canada	Canada	Canada	Canada	Canada



# Positive Buzz (Trended)



Positive buzz of Canada and certain competitors saw significant growth in 2022 that has sustained through 2023



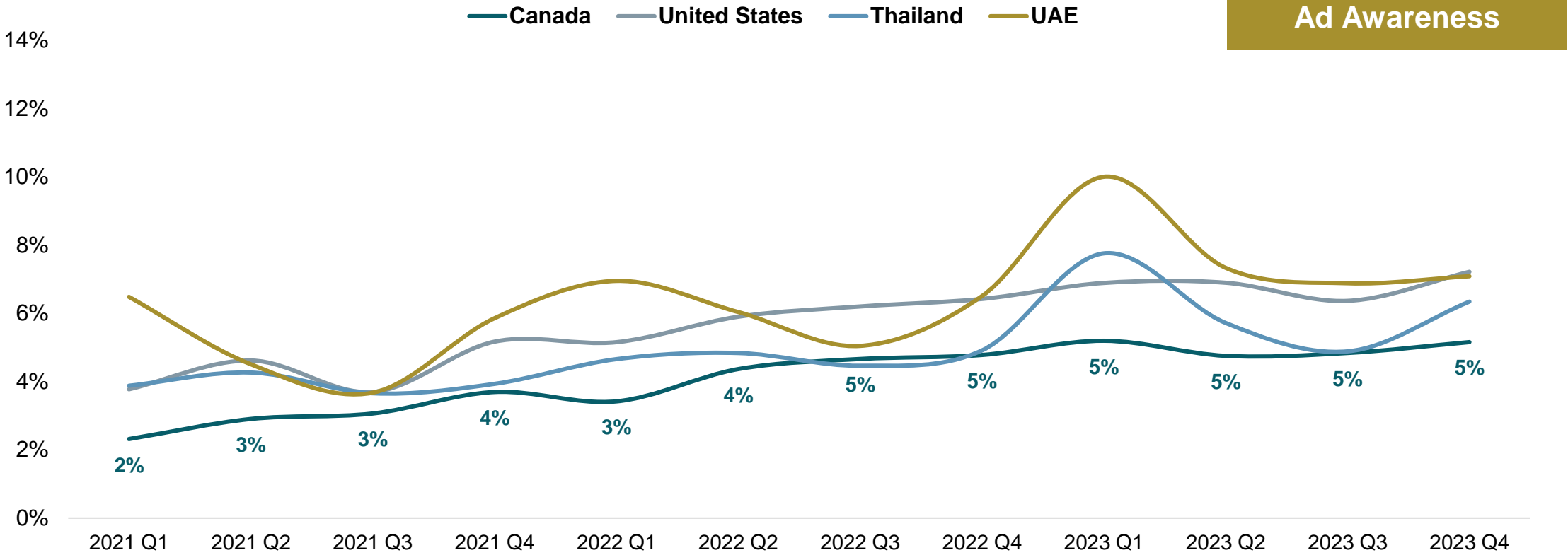
	2021 Q1	2021 Q2	2021 Q3	2021 Q4	2022 Q1	2022 Q2	2022 Q3	2022 Q4	2023 Q1	2023 Q2	2023 Q3	2023 Q4
<b>Canada's Rank</b>	#4	#3	#3	#4	#1	#2	#1	#1	#2	#2	#3	#1
<b>Top Ranked Destination</b>	Australia	Australia	Iceland	Australia	Canada	US	Canada	Canada	US	Iceland	Iceland	Canada

28 2021-2023 Quarterly Trending Base Range: German 18+ (n=1,785-2,443)  
 Q: Over the PAST TWO WEEKS, which of the following destinations have you heard something POSITIVE about (whether in the news, through advertising, or talking to friends and family)?



# Ad Awareness (Trended)

Ad awareness of most destinations in the competitive set increased in 2023; however, scores remain low with fewer than one in ten recalling advertisements for all destinations



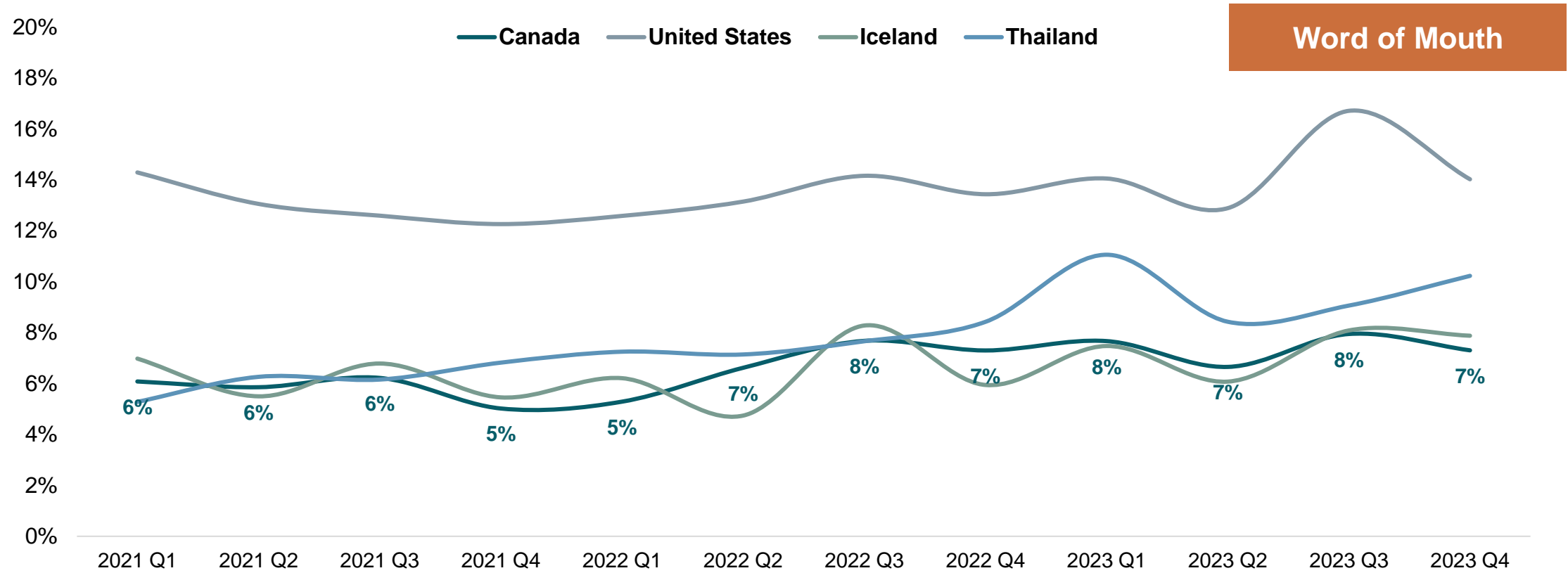
Ad Awareness

	2021 Q1	2021 Q2	2021 Q3	2021 Q4	2022 Q1	2022 Q2	2022 Q3	2022 Q4	2023 Q1	2023 Q2	2023 Q3	2023 Q4
<b>Canada's Rank</b>	#6	#6	#5	#4	#5	#4	#3	#4	#4	#5	#4	#5
<b>Top Ranked Destination</b>	UAE	US	Iceland	UAE	UAE	UAE	US	UAE	UAE	UAE	UAE	US



# Word of Mouth (Trended)

The US continues to lead the competitive set in word of mouth by a considerable margin



**Word of Mouth**

	2021 Q1	2021 Q2	2021 Q3	2021 Q4	2022 Q1	2022 Q2	2022 Q3	2022 Q4	2023 Q1	2023 Q2	2023 Q3	2023 Q4
<b>Canada's Rank</b>	#4	#4	#3	#5	#8	#3	#3	#3	#3	#4	#4	#5
<b>Top Ranked Destination</b>	US	US	US	US	US	US	US	US	US	US	US	US

30 2021-2023 Quarterly Trending Base Range: German 18+ (n=1,785-2,443)  
 Q: Which of the following destinations have you talked about with friends and family in the PAST TWO WEEKS (whether in-person, online, or through social media)?

# THANK YOU

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



CANADIAN TOURISM DATA  
**collective**