

2021 Global Tourism Watch Highlights Report



Global Tourism Watch



Germany

Canada



DESTINATION
CANADA

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 accommodation in the past 3 years, or plan to take such a trip in the next 2 years.

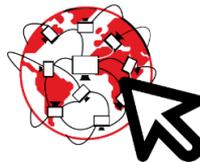


Timing of Fieldwork



2021

Note: this study is conducted annually. Significant differences from the last wave in November 2020 are identified with ▲ / ▼.



Geographical Definition for Qualified Trips

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



GTW Sample Distribution

Sample distribution: **National**

Recent visitors to Canada: **163**
Other travellers: **1,337**
Total sample size: **1,500**

Market Overview

It is important to consider the results in light of the COVID-19 situation at the time of data collection (October 2021).

COVID-19 situation in Germany

In October 2021, Germany had various measures in place to combat the spread of COVID-19, including vaccine passports, masking, and social distancing. While compliance with mask-wearing was high, Germany and Austria lagged behind other western European countries on vaccination rates.¹ An uptick in cases near month's end, coupled with surging levels in the UK fueled by the Omicron variant, had health experts bracing themselves for an imminent fourth wave.²

Outbound travel situation

While COVID-19 case counts were starting to rise, they were well below levels seen in the UK, and opportunities for German travellers to visit international destinations were improving. Many top competitors were open to fully vaccinated travellers, but required PCR tests on arrival (e.g. South Africa)³, while others (e.g., Australia) remained closed to visitors⁴. All travellers over the age of 12 arriving in Germany via air or land had to provide proof of vaccination, proof of recovery, or a negative PCR or antigen test to enter the country. In addition, those who had visited a designated virus-variant area were required to isolate for 14 days.⁵

Canada's borders re-opened to non-resident visitors who were fully vaccinated with a Health Canada approved vaccine on September 7, 2021. All visitors still required a pre-entry COVID-19 molecular test, but quarantine requirements were eliminated for vaccinated travellers.⁶

¹ The Guardian, October 2021.

² The Guardian, October 2021.

³ Business Insider South Africa, January 2022.

⁴ NBC News, October 2021.

⁵ Crisis 24, October 2021.

⁶ Government of Canada, September 2021.

Travel Indicators

Germany is a mature market with high levels of long-haul travel and future travel intention. Intention to visit Canada is up relative to 2020.



▲ / ▼ Significantly higher/lower than 2020 GTW wave.

KEY HIGHLIGHTS

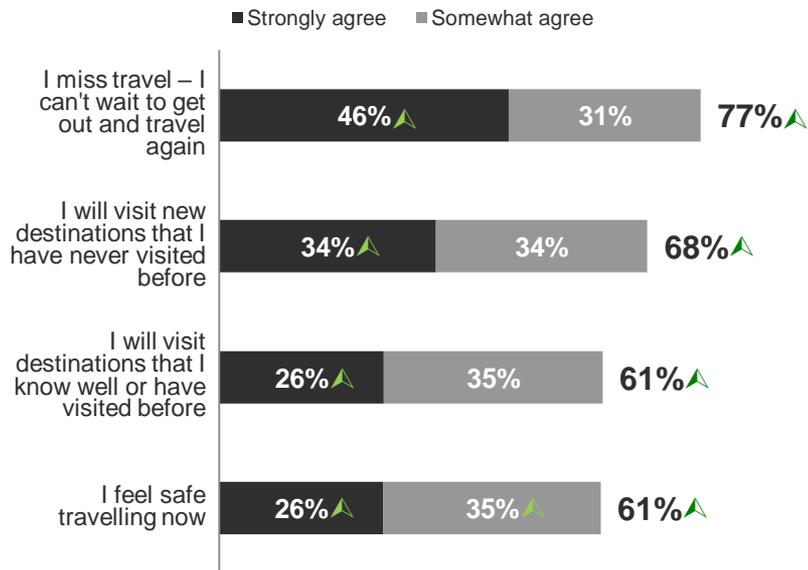
Insight	Implication
<p>German travellers are feeling more optimistic about travel relative to 2020. Significantly more German travellers say they feel safe travelling now and the likelihood of using all forms of transportation has increased.</p>	<p><i>There is an opportunity to capitalize on German travellers' renewed interest in travel. Many destinations are competing for the German market, so finding ways to differentiate Canada is important.</i></p>
<p>Many COVID-19-related concerns have declined, but concerns around health and safety measures and quarantine requirements remain. Vaccine passport requirements are not a particularly important consideration for German travellers.</p>	<p><i>To attract potential German visitors and differentiate Canada from competitors, it is important to communicate Canada's current health and safety measures, including entry requirements for fully vaccinated travellers and the lack of quarantine requirements.</i></p>
<p>While travel is the top spending priority for the next year, German travellers report that they are planning to spend slightly less on travel post-COVID-19 than they did pre-COVID-19. While German travellers intend to spend less on travel to all destinations, the average anticipated spend on long-haul international travel is still much higher than the average anticipated spend on domestic and short-haul international travel.</p>	<p><i>Despite a relative drop in average travel spending compared to pre-COVID-19 levels, spending on travel remains a top priority for German travellers. The current prioritization of spending on travel, along with the high anticipated spend on long-haul travel post-COVID-19, presents an opportunity for Canada.</i></p>
<p>Interest in outdoor activities, particularly hiking/walking and nature parks, has dropped both generally and specifically on a trip to Canada. Visiting oceanside beaches is the top activity German travellers would base a trip around, followed by seeing the Northern lights, and viewing wildlife.</p>	<p><i>It will be important for the Canadian tourism industry to highlight the vast array of activities available on a trip to Canada, including opportunities to visit beaches, see the Northern lights, and view wildlife.</i></p>
<p>German travellers consistently rank cost above all other barriers to visiting Canada. Seeing a great deal is the top factor influencing German travellers to choose Canada as a holiday destination.</p>	<p><i>German travellers are cost conscious and Canada must find ways to convince prospective visitors that a Canadian vacation offers good value for money. Travel incentives and deals may also help to encourage visitation to Canada.</i></p>
<p>Secondary barriers to visiting Canada related to lack of vacation time, inability to take vacation during preferred times to visit Canada, and poor weather are on the rise and are particularly acute for younger travellers. This group also expresses interest in shorter stays in Canada.</p>	<p><i>There may be an opportunity to draw younger German travellers to Canada by promoting shoulder season travel and shorter trip itineraries.</i></p>
<p>Late spring and early fall are almost as popular as the peak summer months for German travellers considering a visit to Canada. Historical visitation is lower than summer months which suggests there is potential to disperse German visitation into the shoulder seasons.</p>	<p><i>There is an opportunity to disperse German visitation into the shoulder seasons by promoting activities outside of the summer months.</i></p>
<p>Travel agents and tour operators play a substantial role in supporting travel from Germany to Canada. The majority of potential German visitors indicate that they are likely to use a travel agent to research or book a trip to Canada.</p>	<p><i>Building and maintaining relationships with the German travel trade is important to boosting visitation to Canada.</i></p>

COVID-19 Considerations

Attitudes Toward Travel and Transportation Modes

- ▶ German travellers are very eager to return to travelling. They are also more likely to feel safe travelling now (61%, up from 27%). However, older travellers (55+ years) remain more cautious. As comfort levels increase, German travellers are more enthused about travel generally, with a slight preference for visiting new destinations over familiar ones. However, older travellers (55+ years) are less interested in new destinations.
- ▶ As COVID-19 restrictions ease, German travellers are also growing more comfortable with using all forms of transportation, including flying internationally (62%, up from 46% in 2020).

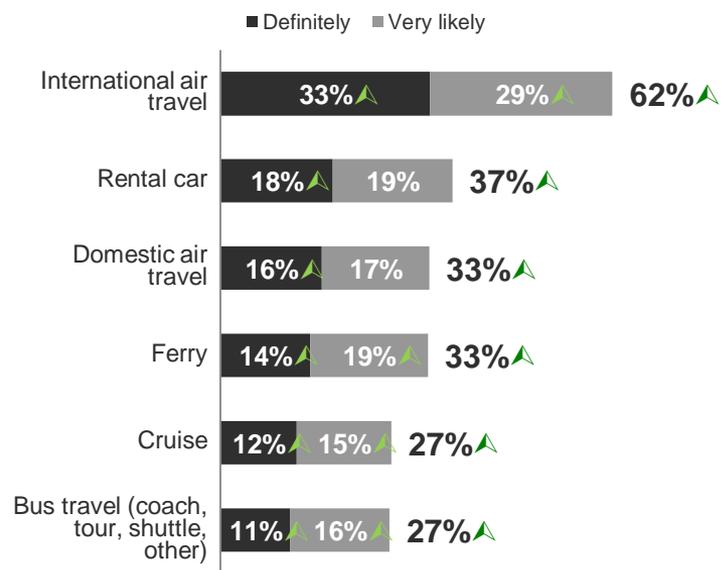
Attitudes Toward Travel



▲ / ▼ Significantly higher/lower than 2020 GTW wave.

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1500) COV13. Thinking of your next holiday, as government restrictions allow, how much do you agree or disagree with the following statements?

Transportation Modes

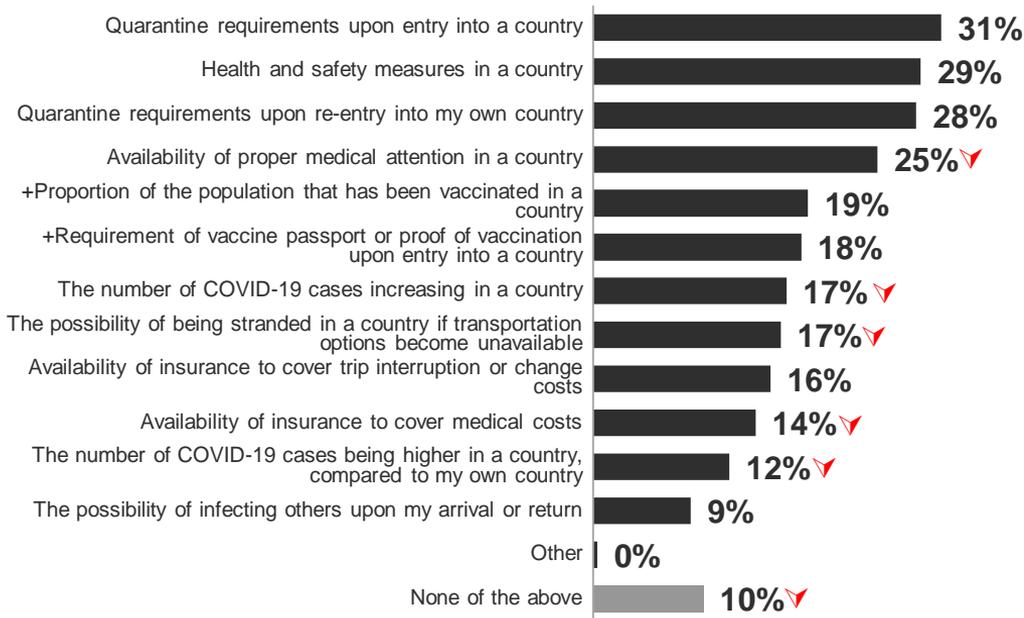


▲ / ▼ Significantly higher/lower than 2020 GTW wave.

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1500) COV16. As government restrictions allow, how likely are you to use the following modes of transportation?

Most Important Considerations in Selecting Travel Destination

- ▶ When selecting a destination, concerns related to medical care, COVID-19 caseloads, becoming stranded, and travel insurance are easing. Proof of vaccination/vaccine passports are not high on German travellers' list of considerations when selecting a travel destination.
- ▶ A destination's quarantine requirements, both at a destination and upon re-entry to Germany, and health and safety measures remain the top concerns. In October 2021, there were no quarantine requirements for vaccinated travellers to enter Canada or upon return to Germany.



▲ / ✓ Significantly higher/lower than 2020 GTW wave.

+ New statement in 2021 GTW – no trending.

Base: Long-haul pleasure travelers (past 3 years or next 2 years) (n=1500)

NEWQ3. When thinking about taking a holiday trip outside of your country, which of the following are the most important considerations in selecting your travel destination? (Select up to 3 options)

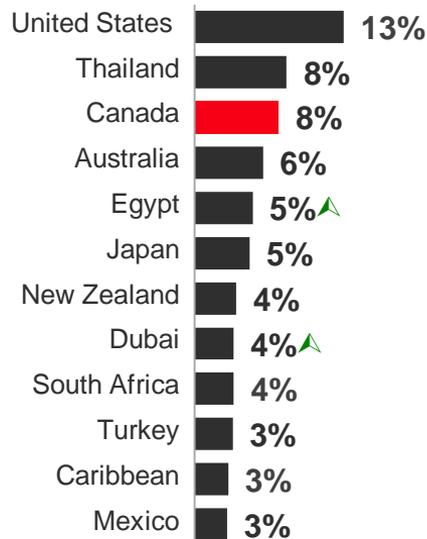
Key Performance Indicators

Unaided Long-Haul Destination Consideration (Next 2 Years)

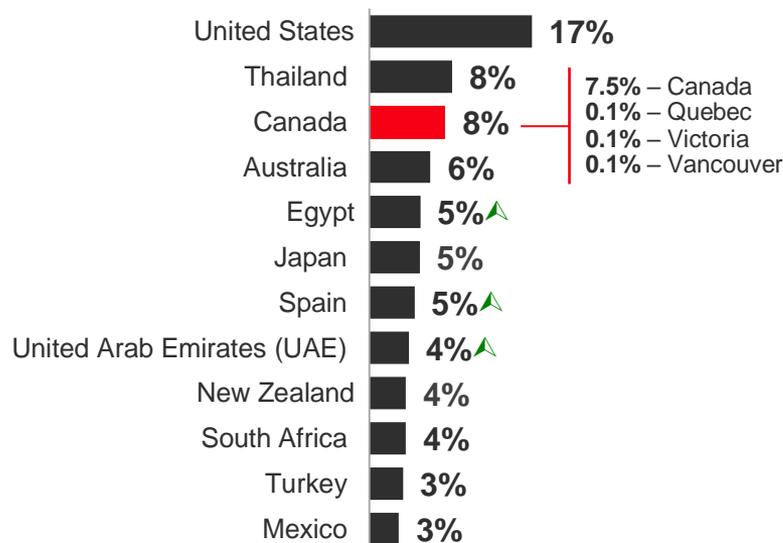
Unaided consideration represents the top-of-mind presence of destinations in the consumer mindset and requires travellers to think of destinations without being prompted.

- ▶ Canada is tied with Thailand as the #2 top-of-mind country that German travellers are considering visiting in the next 2 years. The United States – the consistent top performer in this market – remains in control of #1 position.
- ▶ There appears to be growing interest in Middle Eastern destinations, with Egypt and the United Arab Emirates recording increased mentions.

Top 12 Destination Brands¹



Top 12 Destination Countries²



10%▲
Don't know

28%▼
Not planning to travel

▲ / ▼ Significantly higher/lower than 2020 GTW wave.

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

² Roll-up of brand mentions by country (e.g., percentage who said "Canada" or any destination in Canada).

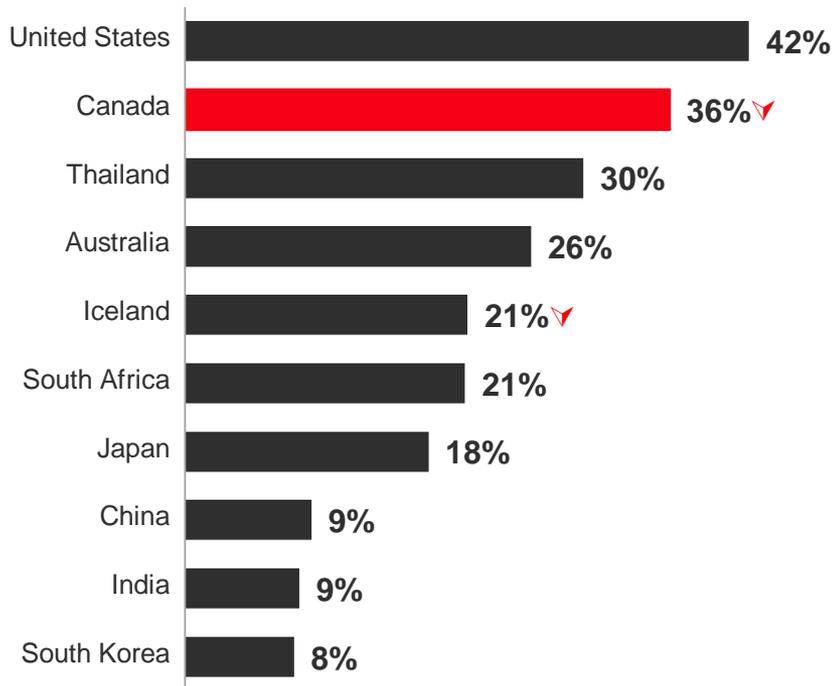
Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1500)

S8. 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)

Aided Destination Consideration (Next 2 Years)

Aided consideration represents the proportion of travellers who say they would seriously consider visiting a destination, when prompted with a list of potential destinations. For these travellers, Canada may not be top-of-mind as a destination, but they are considering a visit in the next 2 years.

► Despite a significant decline compared to 2020, Canada still ranks second on aided consideration – behind the United States, and ahead of Thailand.



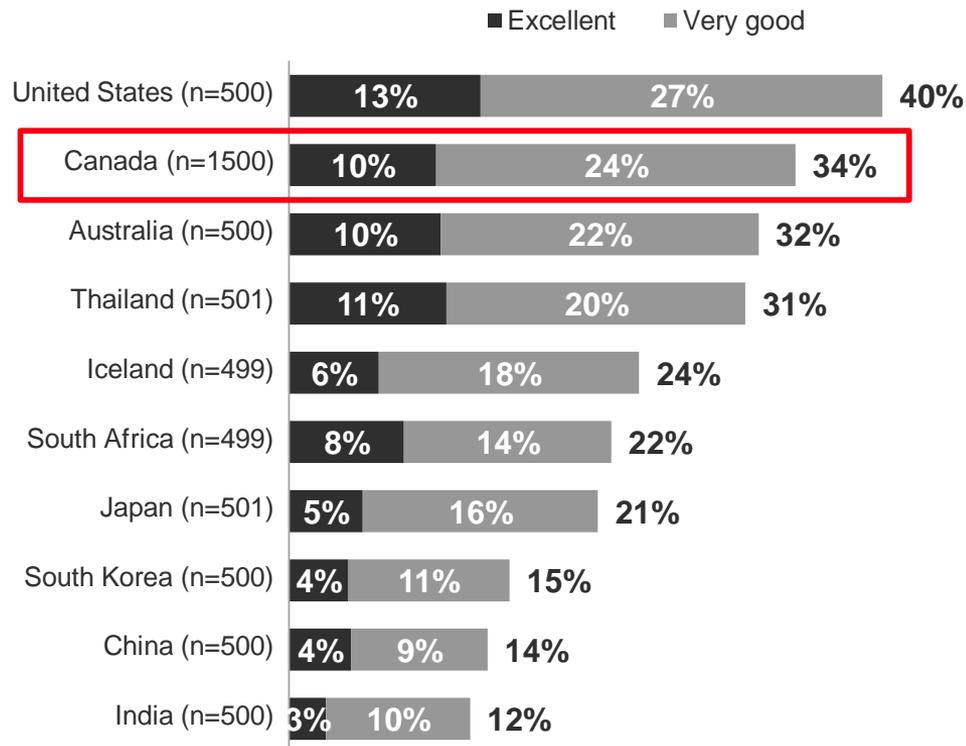
▲ / ▼ Significantly higher/lower than 2020 GTW wave.

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1500)

BVC1. You may have already mentioned this before, but which destinations would you seriously consider visiting in the next 2 years? (Select all that apply)

Knowledge of Holiday Opportunities

▶ Canada ranks second on destination knowledge among long-haul competitors – trailing the United States and marginally ahead of Australia and Thailand.



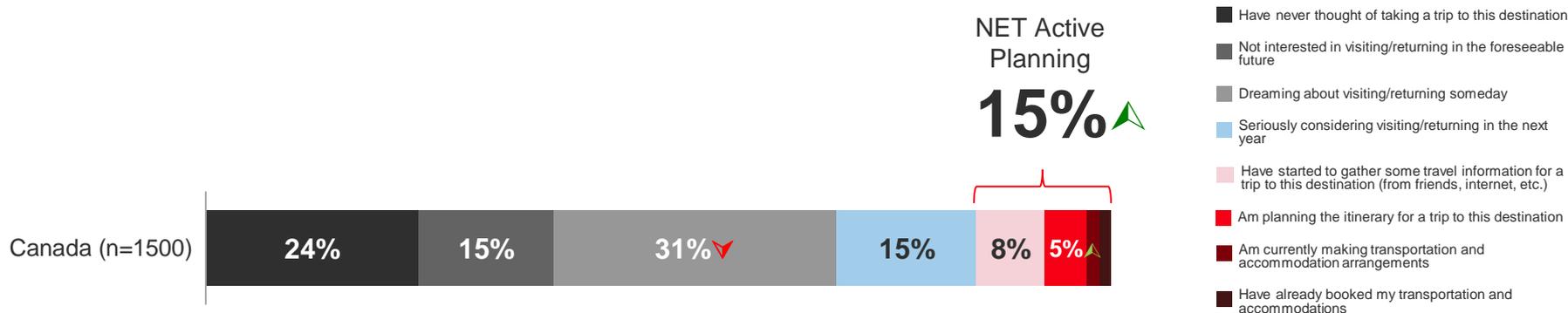
▲ / ▼ Significantly higher/lower than 2020 GTW wave.

Base: Long-haul pleasure travellers (past 3 years or next 2 years) evaluating each destination
MP3. How would you rate your level of knowledge of holiday opportunities in each of the following destinations?

Stage in the Purchase Cycle by Market

There is a purchasing or decision-making cycle associated with long-haul travel; consumers move through progressive stages from not knowing anything about a destination to booking a trip. **NET Active Planning** represents the final four stages, or lower funnel, of this path-to-purchase cycle.

- ▶ Between 10% and 18% of German travellers are in the lower funnel stages of the purchase cycle for Canada's top competitor long-haul destinations. Canada is ranked 3rd overall, up from 4th in 2020, with 15% of German travellers in the NET active planning stages for a trip to Canada, a significant improvement over 2020 (11%).
- ▶ Compared to 2020, fewer German travellers say they are dreaming about visiting Canada, with significantly more in the lower funnel stages of itinerary planning (5%), making arrangements (2%), or already booked (1%). This suggests the prospects for Canada in the German market are positive.



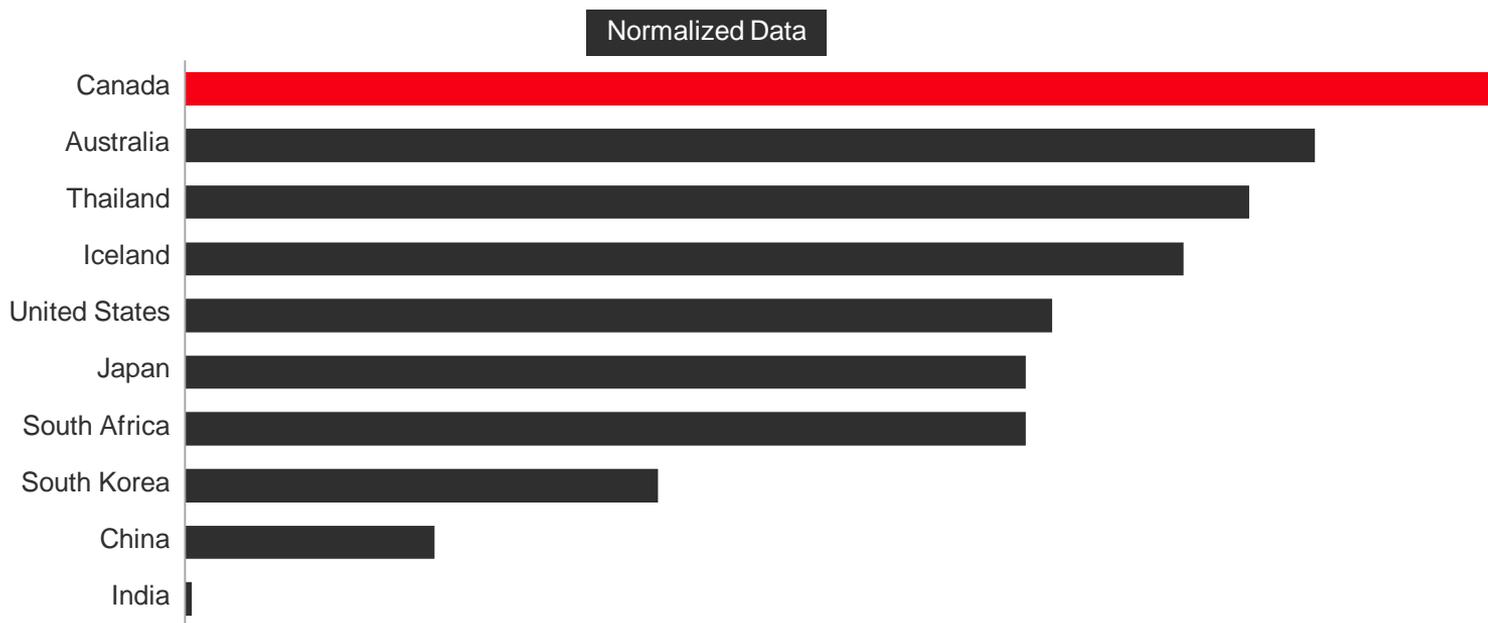
▲ / ▼ Significantly higher/lower than 2020 GTW wave.

Base: Long-haul pleasure travellers (past 3 years or next 2 years) – note all respondents evaluated Canada plus 2 randomly selected countries from the competitive set MP1. Which of the following best describes your current situation when thinking about each of the following destinations for a holiday trip?

NET Promoter Score (NPS)

The Net Promoter Score (NPS) measures the likelihood of travellers to recommend a destination. It is an important measure for advocacy, since a high NPS score suggests that those who have visited Canada are more likely to encourage others to visit. Results are gathered among travellers who have ever visited the destination and data has been normalized to indicate relative NPS scores across all competitors.

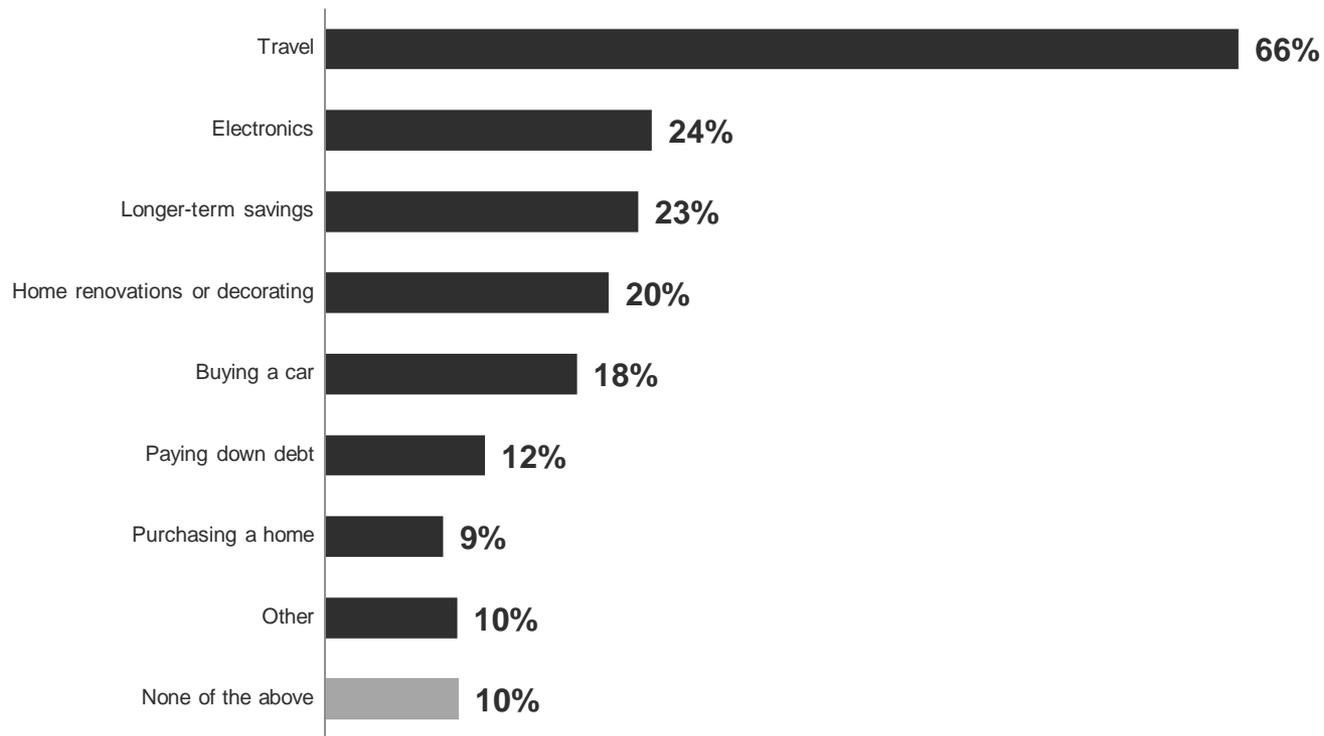
► Compared to competitive destinations, Canada continues to be ranked 1st overall, despite a significant drop in overall NPS score compared to the previous year.



Travel Spending and Canada Travel Intent

Spending Priorities for the Next Year⁺

► Travel is the top immediate spending priority for German travellers in 2021, far ahead of secondary priorities such as electronics and savings.



⁺ New question in 2021 GTW – no trending.

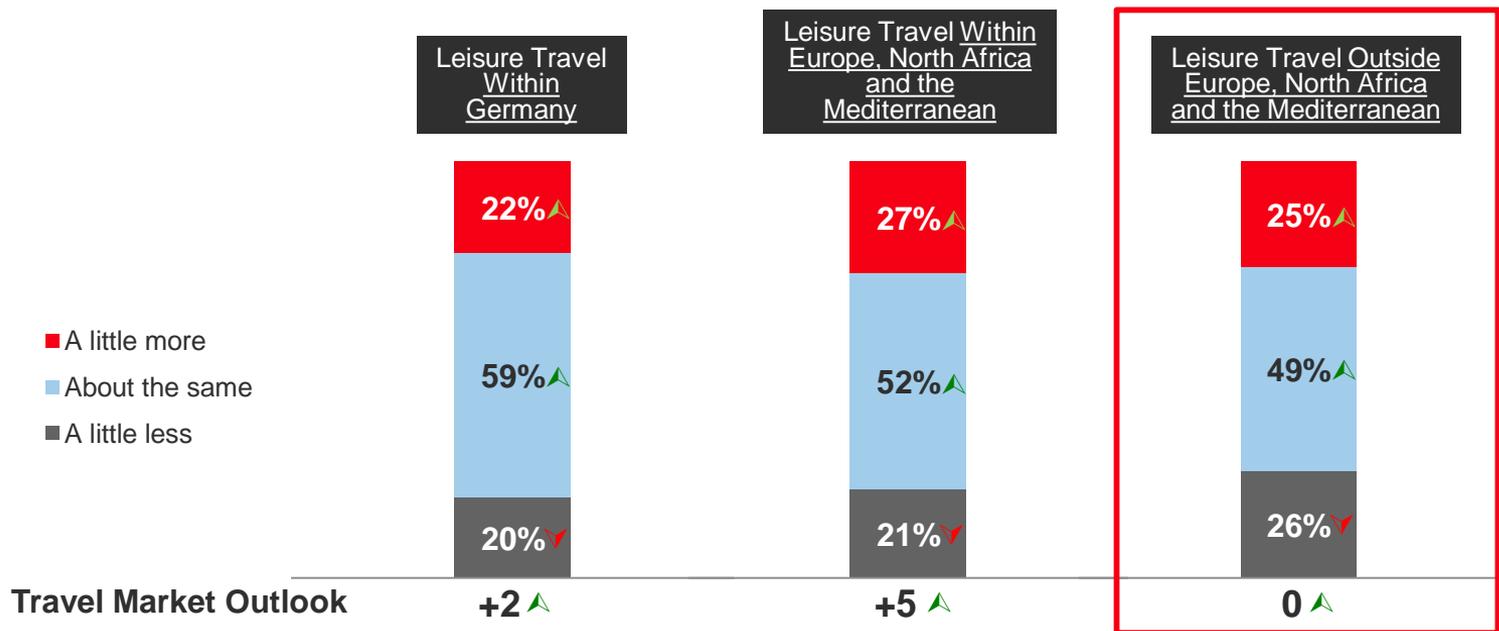
Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1500)

AT. In the next 12 months, which of following will you prioritize spending money on? (Select up to 3 options)

Spending Intentions (in Next 12 Months)

Travel Market Outlook is the difference between those who say they will spend more on domestic, short-haul, long-haul travel in the next 12 months minus those who will spend less.

- ▶ German travellers foresee spending more on domestic and short-haul travel in the next year relative to 2020. The short-haul travel outlook is most improved (-23 in 2020 vs +5 in 2021).
- ▶ While the long-haul travel outlook is at par, it is significantly improved from 2020 (-28) and is marginally above 2019 (-3).



▲ / ✓ Significantly higher/lower than 2020 GTW wave.

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1500)

S2. 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 ...?

Travel Spending+

- ▶ German travellers anticipate spending less on travel post-COVID-19 than they did pre-COVID-19, regardless of the destination.
- ▶ While the projected percentage drop is consistent across all trip lengths, anticipated spending on long-haul travel (\$5077) is more than 1.6 times the anticipated spending on short-haul travel (\$2992).

Mean Annual Household Spend on Vacation Trips

	PRE-COVID	POST-COVID	NET CHANGE	
			<i>POST-COVID</i> <i>MINUS</i> <i>PRE-COVID</i>	
Travelling within Germany	\$1709	\$1585	-\$124	(-7%)
Travelling within Europe, North Africa and the Mediterranean	\$3214	\$2992	-\$222	(-7%)
Travelling outside Europe, North Africa and the Mediterranean	\$5450	\$5077	-\$373	(-7%)

* New questions in 2021 GTW – no trending.

Base: Long-haul pleasure travellers who travelled in 2019 (n=652 Domestic / n=618 Short-haul / n=515 Long-haul)

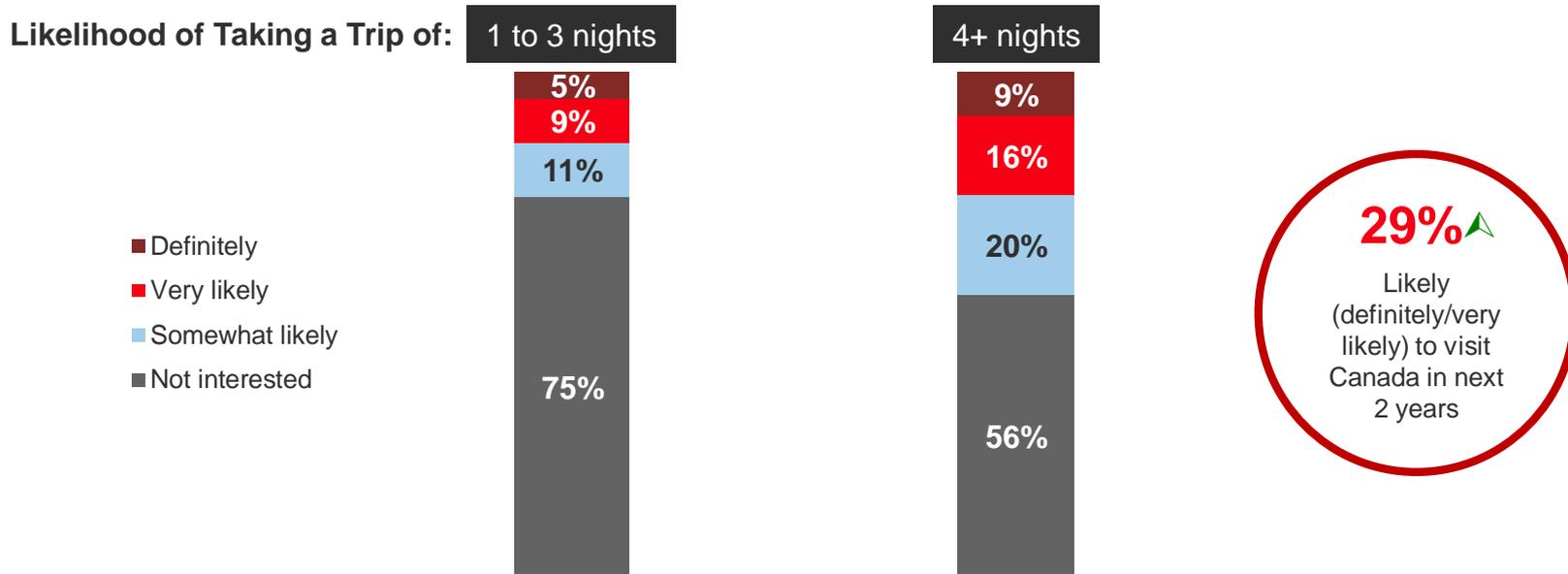
TP2_INT. Thinking about the holiday trips you took in 2019, approximately how much did your immediate household spend in total on trips to each destination? A rough estimate is fine but if you cannot remember please select don't know. (PRE-COVID)

Base: Long-haul pleasure travellers who expect to travel post COVID-19 (n=635 Domestic / n=645 Short-haul / n=557 Long-haul)

TP2B_INT. Thinking about the vacation trips you plan to take when COVID-19 is no longer a consideration, approximately how much does your immediate household intend to spend in total on trips to each destination? A rough estimate is fine but if it's too hard to predict please select don't know. (POST-COVID)

Likelihood of Visiting Canada in Next 2 Years

- ▶ Among all German travellers, the likelihood of visiting Canada in the next two years is up significantly from 2020.
- ▶ Intent to visit Canada in the next two years is highest among those aged 18-34 and lowest among those aged 55+.
- ▶ German travellers are much more likely to be considering a trip to Canada of 4+ nights than a trip of 1-3 nights.



  Significantly higher/lower than 2020 GTW wave.

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=1500)

MP6. Realistically, how likely are you to take a holiday trip to Canada in the next 2 years?

Potential Market Size For Canada

Study data is used to estimate the size of the potential market for Canada in two ways – the target market (proportion of all German travellers in the dream to purchase stages of the purchase cycle for Canada) and the immediate potential market (intention among the target market to visit in the next two years).

- ▶ The proportion of German travellers considering Canada remained constant in 2021, but within that group the intention to visit in the next two years increased significantly, resulting in an immediate potential market size of 5.69 million.

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

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



Target Market for Canada



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

Size of the target market



Immediate Potential for Canada



Will definitely/very likely visit Canada in the next 2 years¹

Immediate potential



  Significantly higher/lower than 2020 GTW wave.

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=1500); Immediate potential for Canada = dream to purchase stages for P2P for Canada (n=936)

MP1. Which of the following best describes your current situation when thinking about each of the following destinations for a holiday trip?

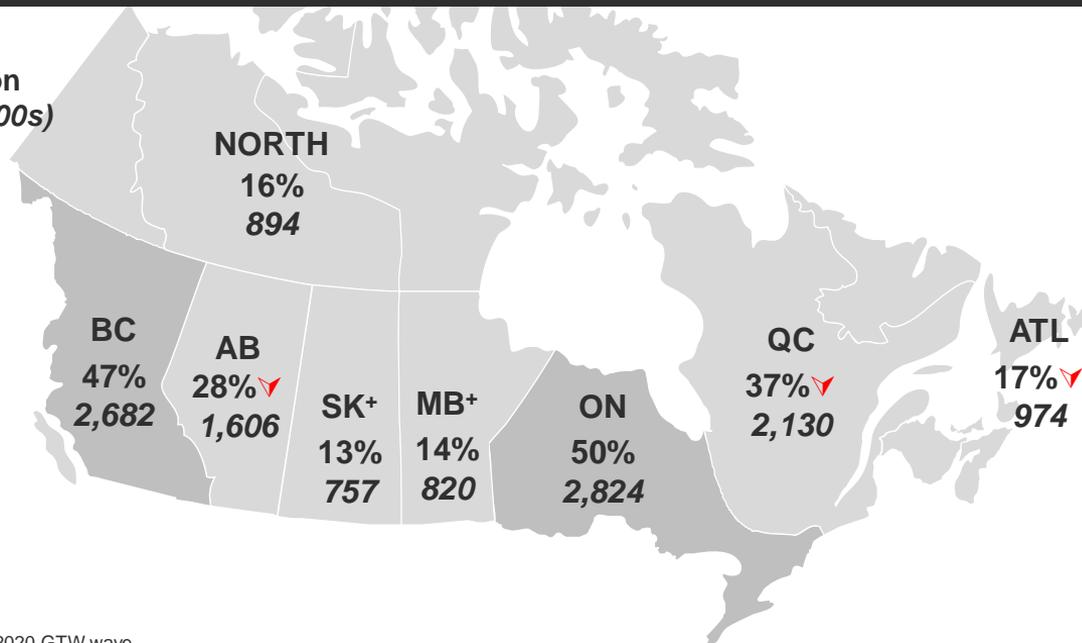
MP6. Realistically, how likely are you to take a holiday trip to Canada in the next 2 years?

Potential Market Size for the Regions

- ▶ Ontario and BC continue to stand out as the provinces most likely to attract the largest share of German travellers.
- ▶ There is waning interest in visiting Quebec, Alberta, and Atlantic Canada.

Immediate Potential for Canada: **5,694,500**

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



▲ / ▼ Significantly higher/lower than 2020 GTW wave.

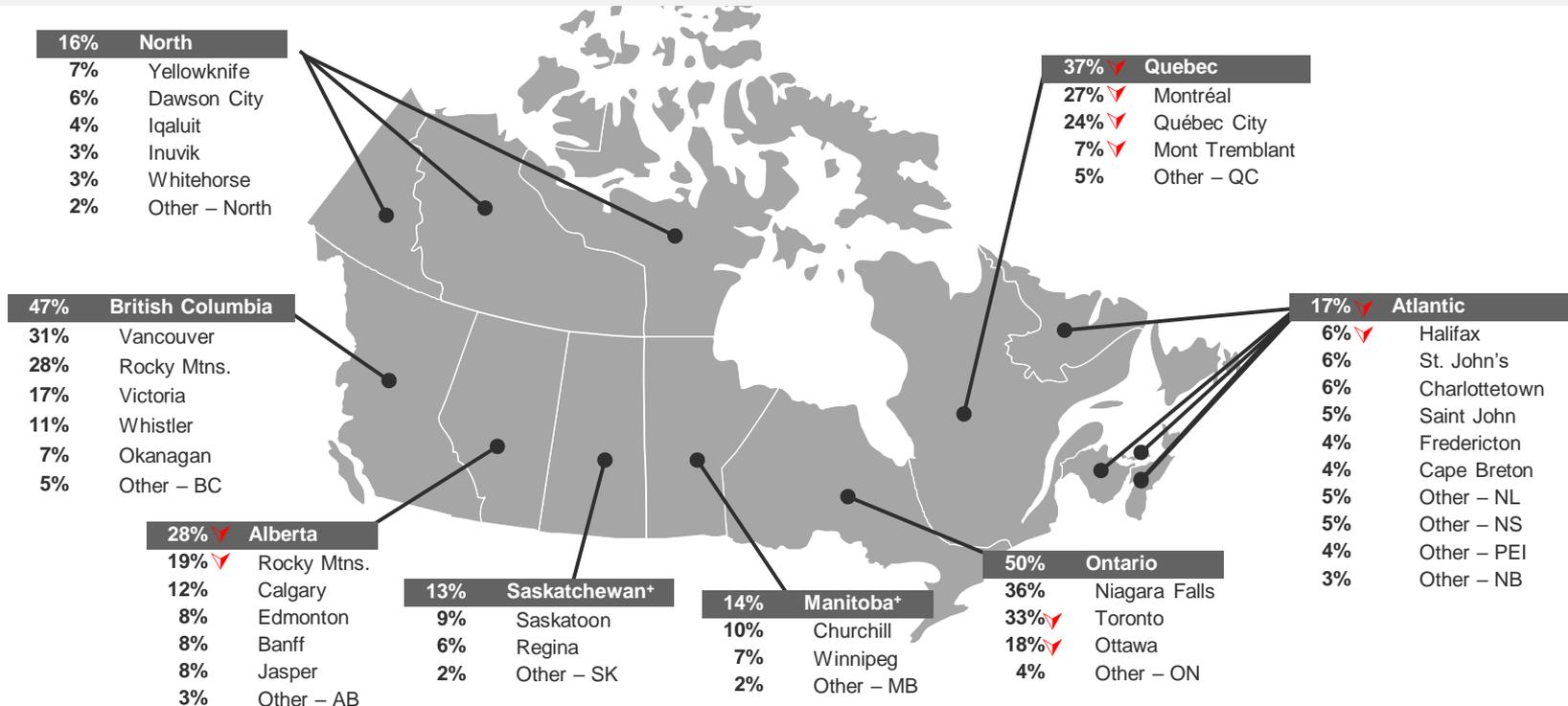
+ Saskatchewan and Manitoba were combined in 2020 GTW wave – no trending.

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=442)

MP7. If you were to take a holiday trip to Canada in the next 2 years, which of the following Canadian travel destinations are you likely to visit? (Select all that apply)

Canadian Destinations Likely to Visit

- ▶ Although interest in visiting Ontario is similar to 2020, German traveller interest in Toronto and Ottawa is down. Interest in Quebec is down across each of the top destinations, while declining interest in Alberta is fueled by waning interest in visiting the Rocky Mountains and Halifax holds less appeal in Atlantic Canada.



▲ / ▼ Significantly higher/lower than 2020 GTW wave.

* Saskatchewan and Manitoba were combined in 2020 GTW wave – no trending.

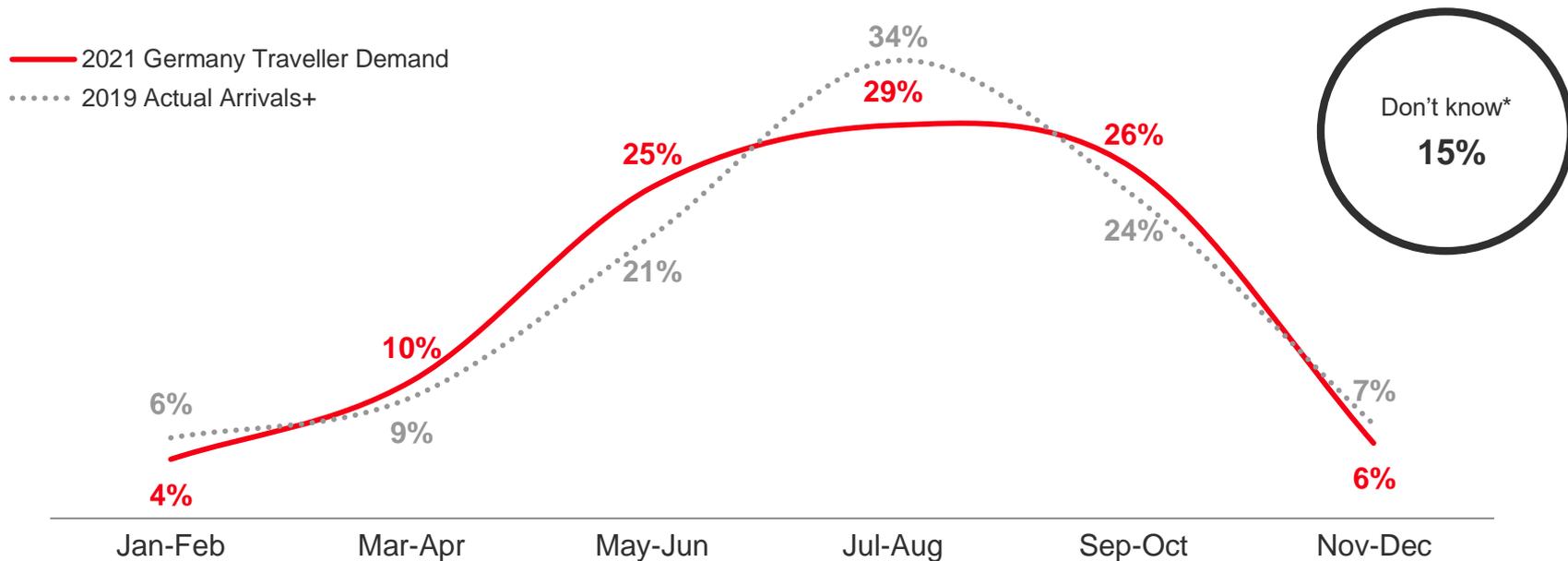
Base: Those in the dream to purchase stages of the path to purchase for Canada and definitely/very likely to take a trip to Canada (n=442)

MP7. If you were to take a vacation trip to Canada in the next 2 years, which of the following Canadian travel destinations are you likely to visit? (Select all that apply)

MP7a-i. Within [province/region], which travel destinations are you likely to visit? (Select all that apply)

Germany Seasonal Demand for Canada

- ▶ July and August are the most popular months for German travellers considering a visit to Canada, and also historically the peak months for visitor arrivals from Germany.
- ▶ Late spring and early fall are almost as popular as the peak summer months for German travellers considering a visit to Canada. There is potential to disperse German visitation into the shoulder seasons given that demand outpaces historical visitation during these months.



* Source: 2019 Statistics Canada Frontier Border Counts.

* 'Don't know' responses excluded from seasonal demand chart.

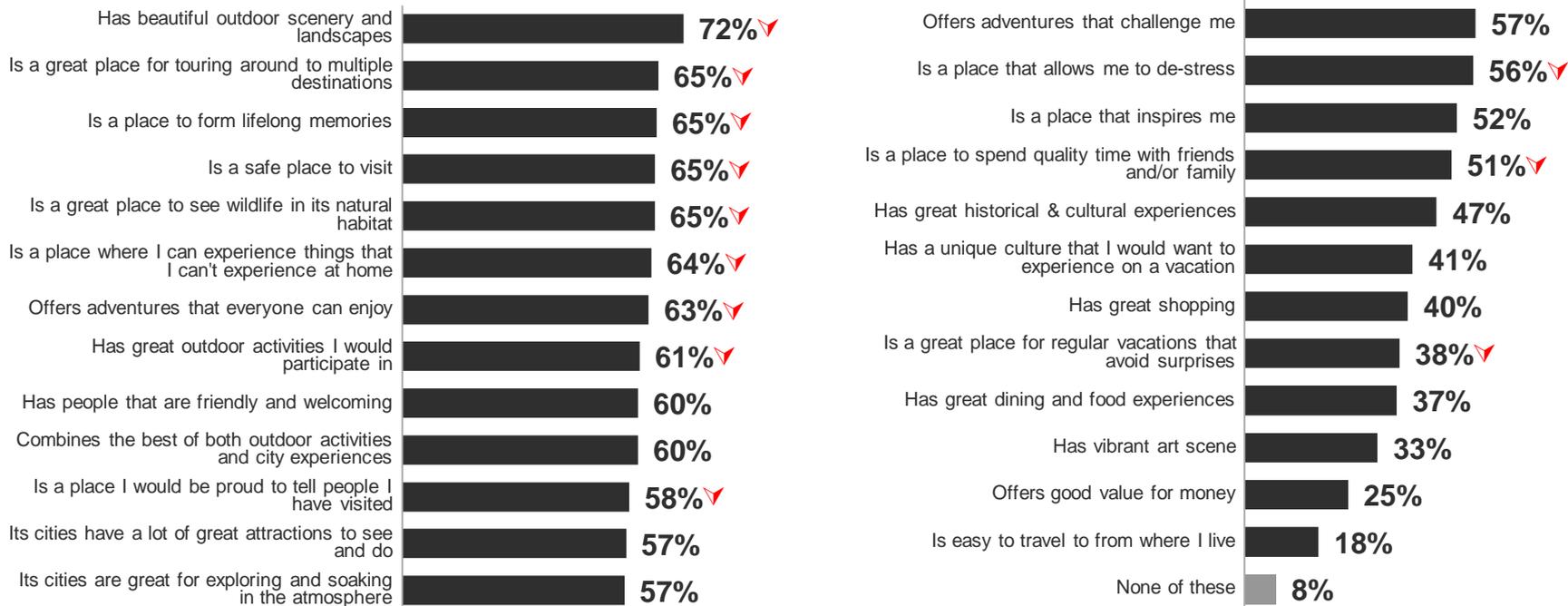
▲ / ▼ Significantly higher/lower than 2020 GTW wave.

Base: Those in the dream to purchase stages of the path to purchase for Canada, excluding 'Don't know' (n=936)
PC3. What time of year would you consider taking a holiday trip to Canada in the next 2 years? (Select all that apply)

Impressions of Canada

Impressions of Canada as a Holiday Destination

► Canada is best known among German travellers for beautiful scenery and landscapes, followed by being a great place for touring, being a place to form lifelong memories, being a safe destination, and wildlife viewing. However, the proportion of German travellers associating Canada with these top attributes, as well as several other attributes, declined in 2021.



▲ / ▼ Significantly higher/lower than 2020 GTW wave.

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1500)

MP5_NEW. We are interested in your general impressions about destinations, even if you have never been there. Please select all the destination you think apply to the statement. Select None of these if you think none of the destinations apply.

Key Barriers for Visiting Canada

- ▶ As seen in 2020, cost concerns continue to stand out as the primary barrier for potential German travellers to visit Canada in 2021. As COVID-19 vaccines became more widely available globally in 2021, health risks and safety concerns have declined in importance, while concerns about visa requirements, not enough time to take a vacation, inability to take vacation during preferred times to visit Canada, poor weather, and distance to travel within Canada increased.



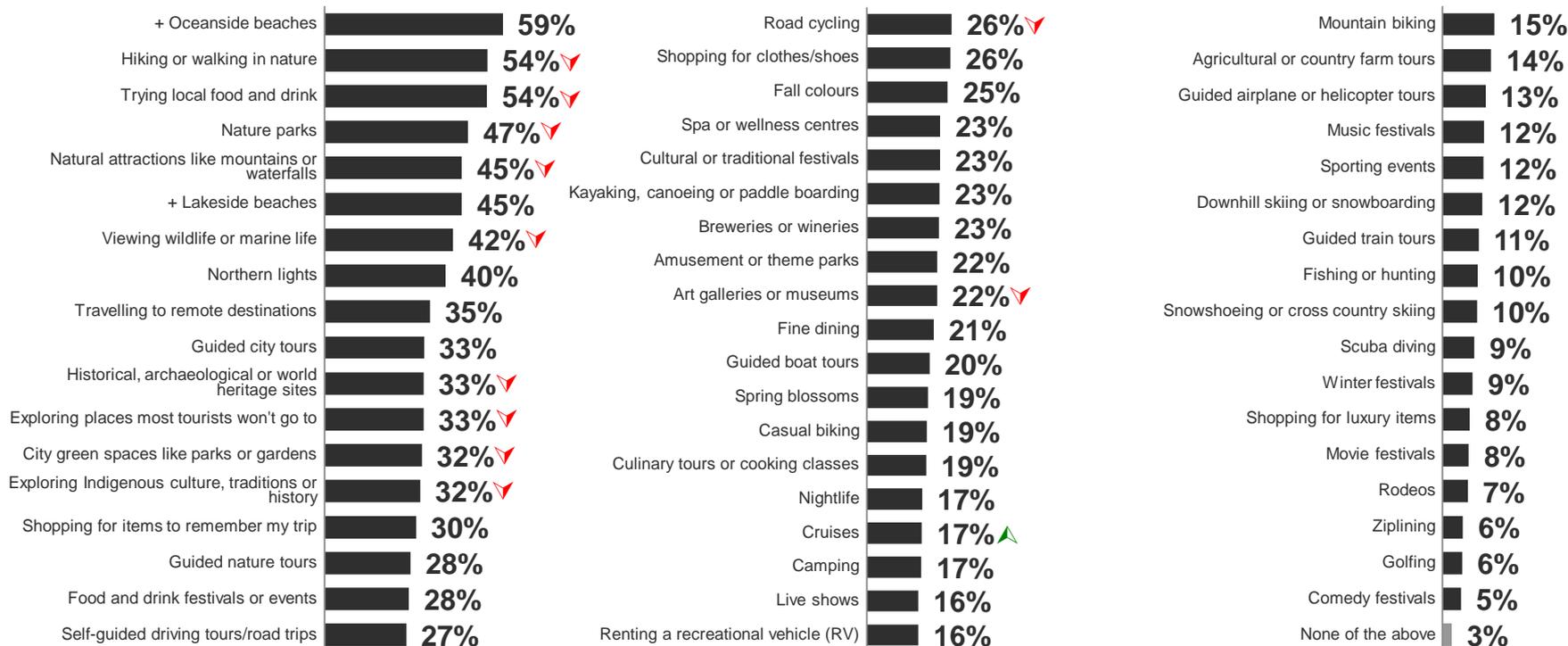
▲ / ▼ Significantly higher/lower than 2020 GTW wave.

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1500)
MP9. Which of the following factors might discourage you from visiting Canada? (Select all that apply)

Vacation Interests

Activities Interested in While on Holiday

- ▶ Along with visiting oceanside beaches, German travellers have a strong preference for hiking/walking in nature and trying local food and drink.
- ▶ Interest in a wide variety of vacation activities, including both nature and city-based activities, have decreased relative to 2020.



+ New statement in 2021 GTW – no trending.

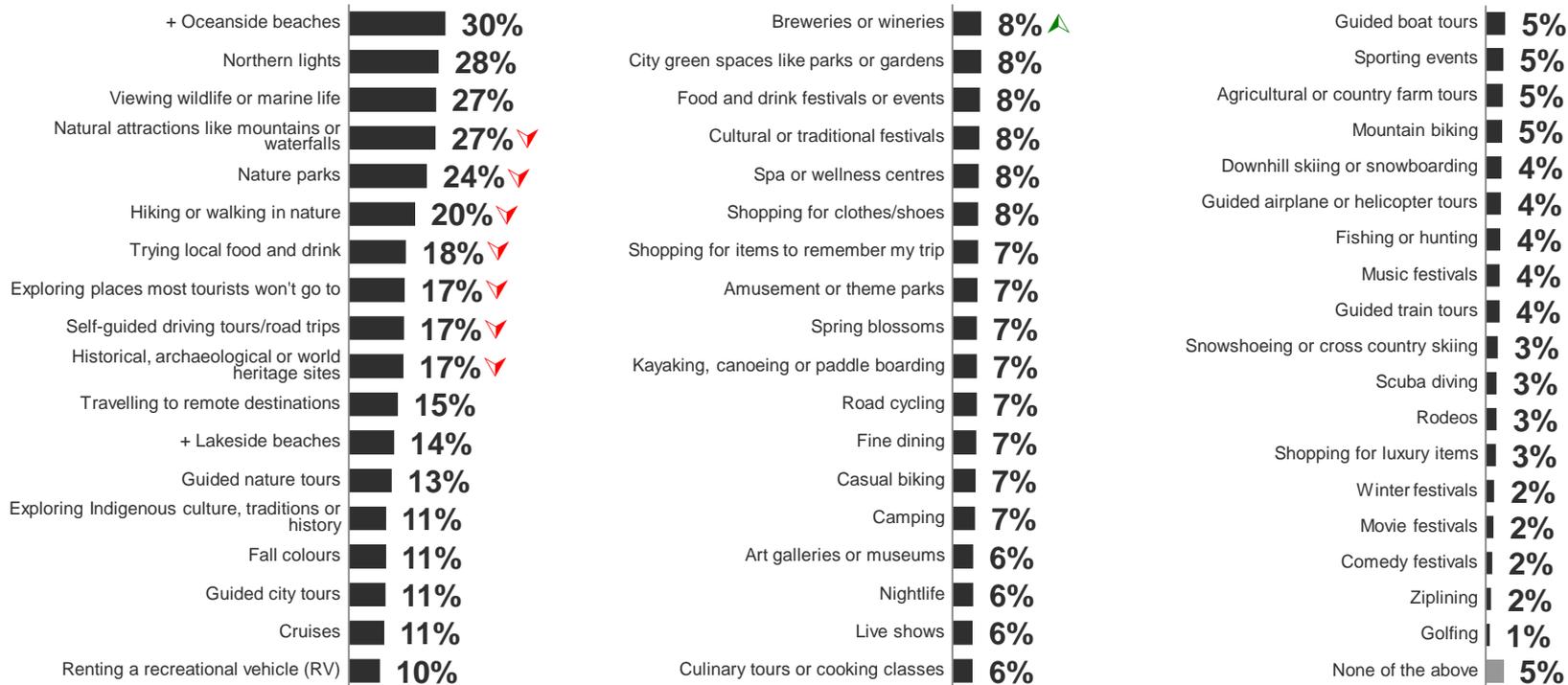
Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1500)

MP10. In general, what activities or places are you interested in while on vacation? (Select all that apply)

▲ / ▼ Significantly higher/lower than 2020 GTW wave.

Activities to Base an Entire Trip Around

- ▶ Visiting oceanside beaches is the top activity German travellers would base a trip around, followed by seeing the Northern lights and wildlife viewing – these present opportunities for Canada to attract German travellers. Natural attractions like mountains and waterfalls and nature parks are also strong trip anchors, although interest is down compared to 2020.



+ New statement in 2021 GTW – no trending.

Base: Long-haul pleasure travellers (past 3 years or next 2 years) answering (n=1463)

MP12. Among these activities, are there any that are important enough that you would base an entire trip around that activity? (Select all that apply)

▲ / ▼ Significantly higher/lower than 2020 GTW wave.

Time of Year Would Participate in Activities While on Holiday*

- Summer is the preferred season to take part in most of the listed vacation activities, but some popular activities such as hiking/walking in nature and nature parks, hold three season appeal. Other popular activities like wildlife viewing and natural attractions are popular in spring and summer. Seeing the Northern Lights, which is a popular activity to base a trip around, is preferred in the winter months. Trying local food and drink holds year-round appeal.

	Summer	Fall	Winter	Spring
+ Oceanside beaches	92%	16%	7%	23%
Hiking or walking in nature	67%	52%	20%	66%
Trying local food and drink	76%	59%	49%	68%
Nature parks	69%	42%	13%	59%
Natural attractions like mountains or waterfalls	66%	36%	14%	56%
+ Lakeside beaches	90%	13%	6%	27%
Viewing wildlife or marine life	73%	36%	19%	50%
Northern lights	24%	32%	62%	23%
Travelling to remote destinations	70%	39%	18%	56%
Guided city tours	66%	44%	22%	68%
Historical, archaeological or world heritage sites	62%	44%	19%	61%
Exploring places most tourists won't go to	58%	39%	20%	54%
City green spaces like parks or gardens	77%	42%	15%	67%
Exploring Indigenous culture, traditions or history	74%	51%	30%	67%
Shopping for items to remember my trip	71%	51%	44%	61%
Guided nature tours	59%	38%	12%	60%
Food and drink festivals or events	70%	46%	26%	57%

	Summer	Fall	Winter	Spring
Self-guided driving tours/road trips	62%	35%	11%	51%
Road cycling	74%	36%	6%	59%
Shopping for clothes/shoes	61%	52%	42%	61%
Fall colours	n/a	100%	n/a	n/a
Spa or wellness centres	47%	52%	65%	49%
Cultural or traditional festivals	70%	38%	21%	55%
Kayaking, canoeing or paddle boarding	84%	19%	6%	36%
Breweries or wineries	60%	57%	30%	52%
Amusement or theme parks	74%	24%	9%	51%
Art galleries or museums	55%	57%	54%	62%
Fine dining	65%	56%	53%	61%
Guided boat tours	75%	17%	9%	35%
Spring blossoms	n/a	n/a	n/a	100%
Casual biking	75%	36%	8%	60%
Culinary tours or cooking classes	65%	41%	37%	56%
Nightlife	76%	34%	31%	46%
Cruises	59%	31%	25%	46%
Camping	80%	21%	9%	40%

	Summer	Fall	Winter	Spring
Live shows	66%	43%	38%	55%
Renting a recreational vehicle (RV)	70%	32%	9%	47%
Mountain biking	65%	33%	9%	56%
Agricultural or country farm tours	48%	33%	16%	53%
Guided airplane or helicopter tours	57%	22%	20%	50%
Music festivals	83%	25%	16%	42%
Sporting events	70%	39%	35%	55%
Downhill skiing or snowboarding	n/a	n/a	100%	n/a
Guided train tours	49%	48%	33%	55%
Fishing or hunting	63%	32%	20%	46%
Snowshoeing or cross country skiing	n/a	n/a	100%	n/a
Scuba diving	79%	12%	12%	26%
Winter festivals	n/a	n/a	100%	n/a
Shopping for luxury items	58%	41%	46%	65%
Movie festivals	64%	33%	33%	50%
Rodeos	56%	24%	19%	34%
Ziplining	68%	10%	18%	42%
Golfing	58%	23%	15%	53%
Comedy festivals	58%	25%	28%	43%

* New question in 2021 GTW – no trending.

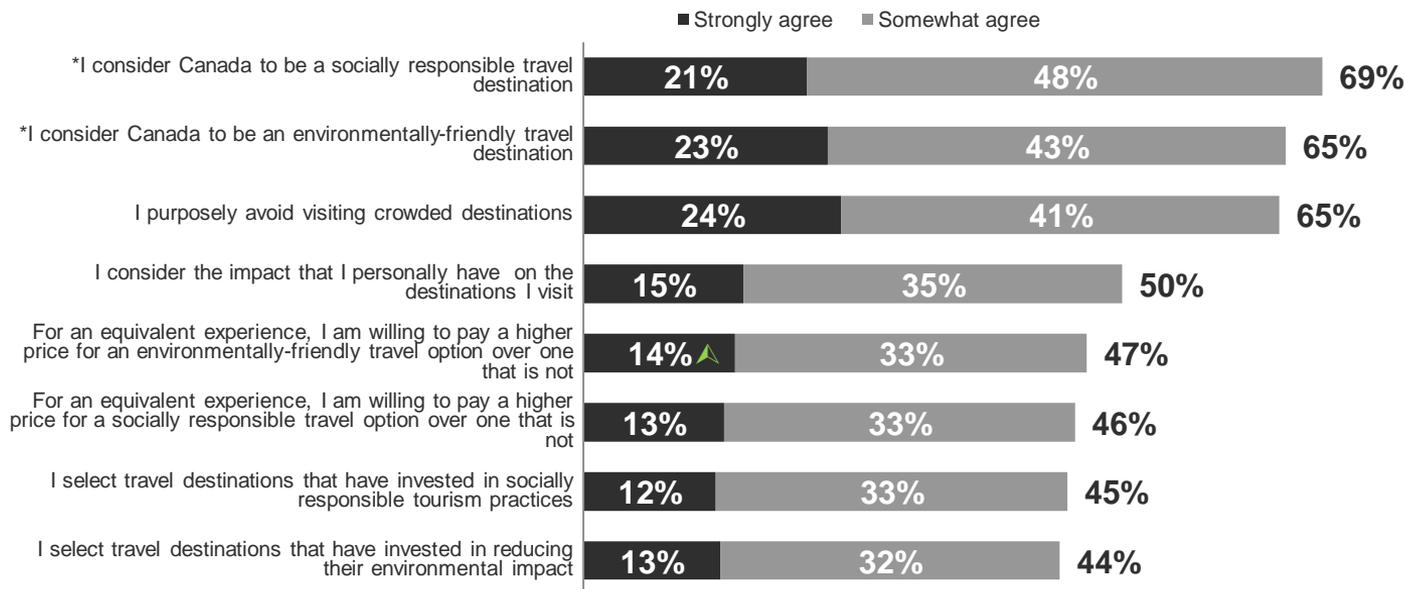
Base: Long-haul pleasure travellers (past 3 years or next 2 years) interested in activity MP10A. Thinking about activities or places you are interested in while on vacation, when would you typically take part in these activities? (Select all that apply) Note that the seasons refer to the destination's seasons.

 >50% of respondents who are interested in the activity would participate in this season

 40-49% of respondents who are interested in the activity would participate in this season

Sustainable Travel

- ▶ Half of German travellers say they are thinking about the impact of travel on destinations, and almost as many say they select travel destinations based on environmental and social impacts. A similar number say they would pay more for environmentally and socially responsible options.
- ▶ A majority of those interested in taking a trip to Canada consider it to be a socially responsible and environmentally-friendly travel destination.
- ▶ However, a much smaller number mention the availability of eco-friendly (11%) or socially responsible (8%) travel options as factors influencing their choice of Canada as a travel destination.¹



▲ ▼ Significantly higher/lower than 2020 GTW wave.

¹Data can be found on page 32

* Base: Asked among those in the dream to purchase stages of the path to purchase for Canada (n=936)

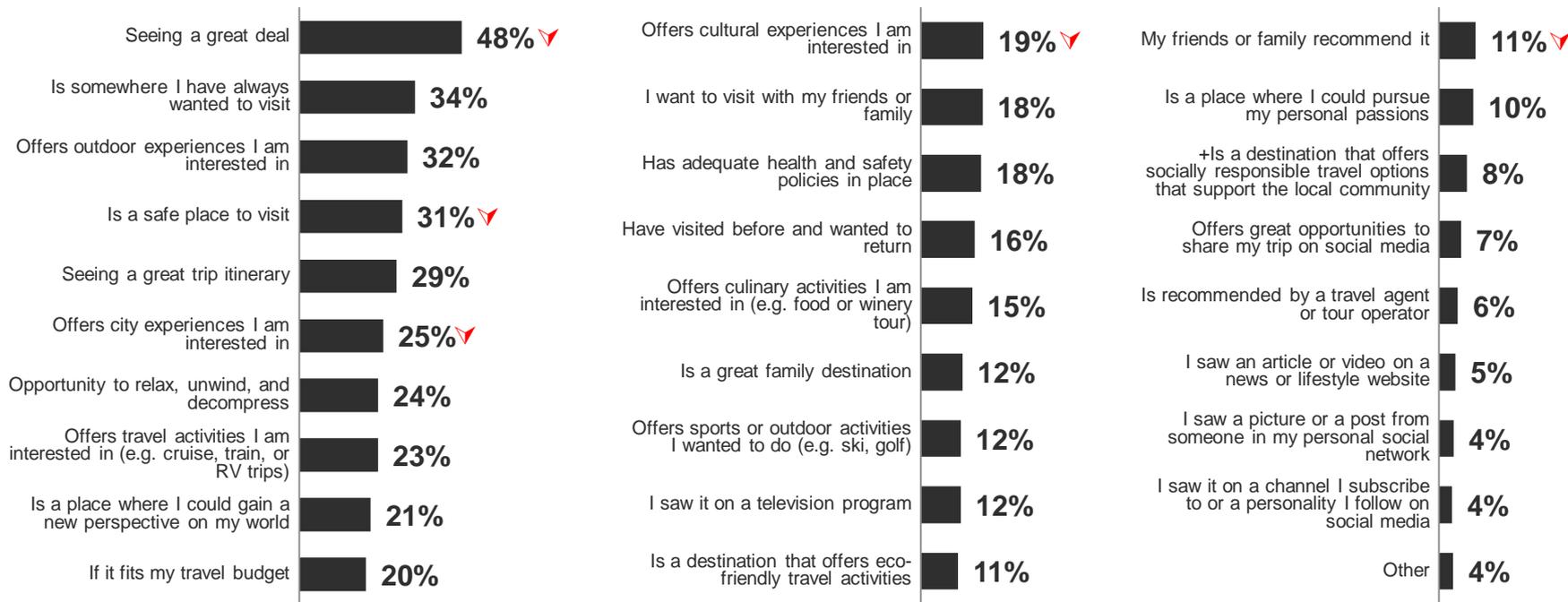
Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1500)

PC31. Sustainable travel refers to "travel that minimises any negative impact 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". Please indicate your level of agreement with each of the following statements ...

Key Characteristics of Future Trips to Canada

Factors Influencing Destination Choice

- ▶ Seeing a great deal, a longstanding desire to visit, and the availability of interesting outdoor experiences are the top factors influencing German travellers to choose Canada as a holiday destination.
- ▶ Seeing a great deal, destination safety, city experiences, cultural experiences, and recommendations from friends or family have all decreased in importance as reasons to choose Canada since 2020.



▲ / ▼ Significantly higher/lower than 2020 GTW wave.

+ New statement in 2021 GTW – no trending.

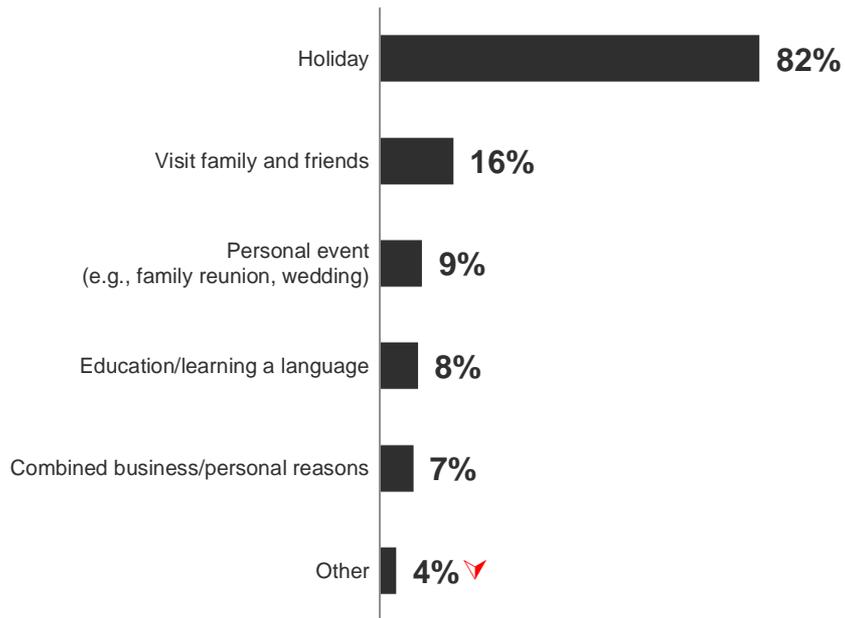
Base: Long-haul pleasure travellers (past 3 years or next 2 years) considering Canada (n=555)

FT3. Which of the following would factor into your choice to travel to [destination]? (Select all that apply)

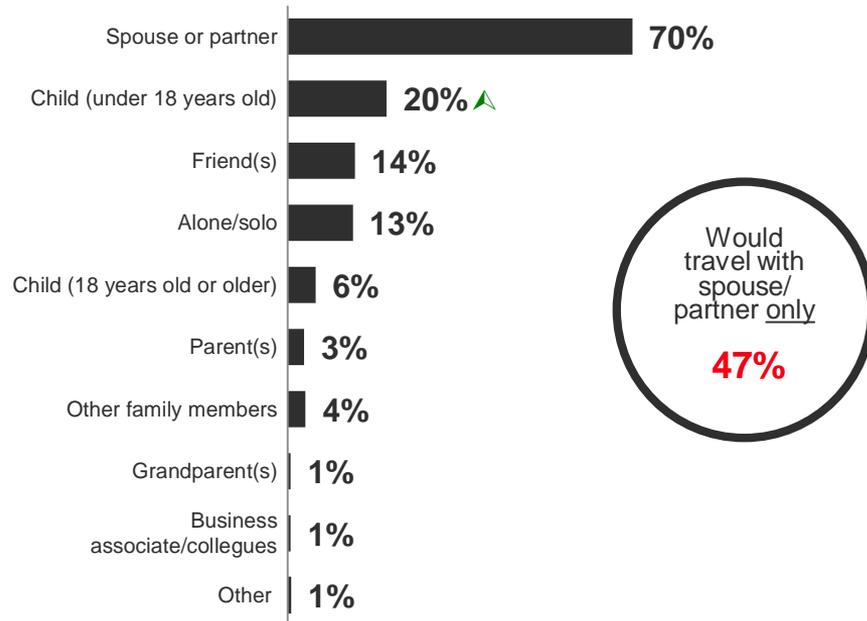
Main Purpose and Travel Party of Future Trip

- ▶ Holiday trips will drive German travel to Canada in the next 2 years, with VFR travel (trips to visit friends and relatives) also playing an important role.
- ▶ German travel parties visiting Canada will be largely be made up of immediate family – primarily couples trips or family trips with children. Intent to travel with children on a trip to Canada has increased since 2020.

Purpose of Trip



Travel Party



Would travel with spouse/partner only

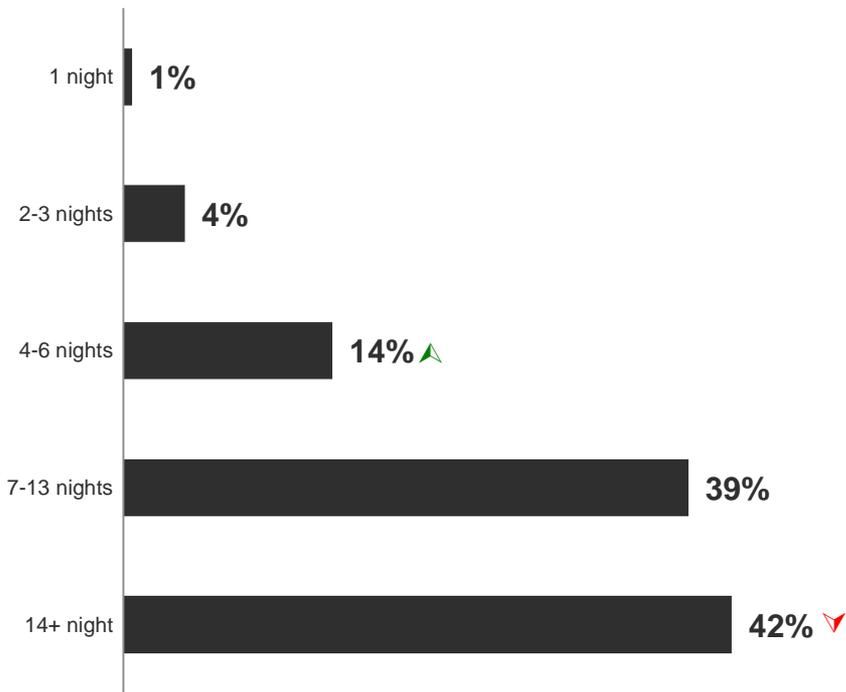
47%

▲ / ▼ Significantly higher/lower than 2020 GTW wave.

▲ / ▼ Significantly higher/lower than 2020 GTW wave.

Length of Future Trip

- ▶ German travellers typically would like to spend at least one week in Canada, with the strongest preference for a trip of 2+ weeks. While a considerable number of German travellers are interested in spending more than two weeks on a trip to Canada, that number has dropped since 2020.
- ▶ The proportion favouring a 4-6 night stay has increased and is most popular among travellers 18-34 years.



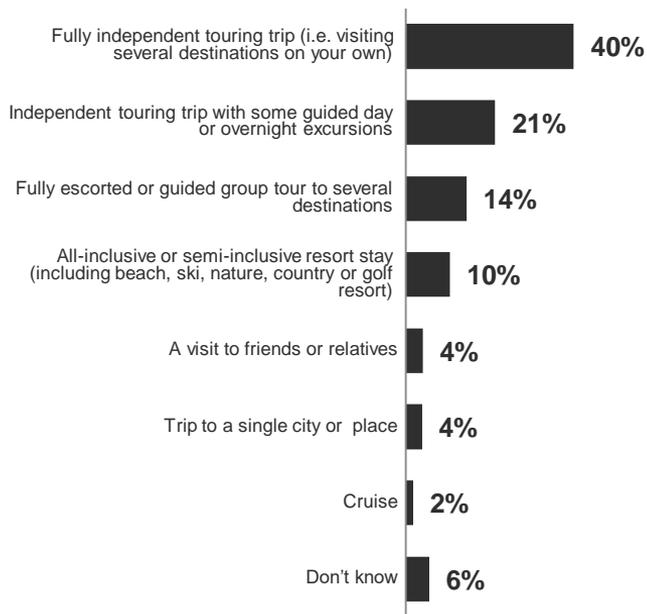
▲ / ▼ Significantly higher/lower than 2020 GTW wave.

Base: Long-haul pleasure travellers (past 3 years or next 2 years) considering Canada (n=555)
FT4. How many nights do you think you would spend on a trip to [destination]?

Trip Type and Accommodation for Future Trip

- ▶ Most German travellers would prefer to travel independently on a trip to Canada, either with or without the addition of some guided excursions as part of the trip.
- ▶ Despite a decline compared to 2020, mid-priced hotels still stand out as the most preferred type of accommodation for a trip to Canada.

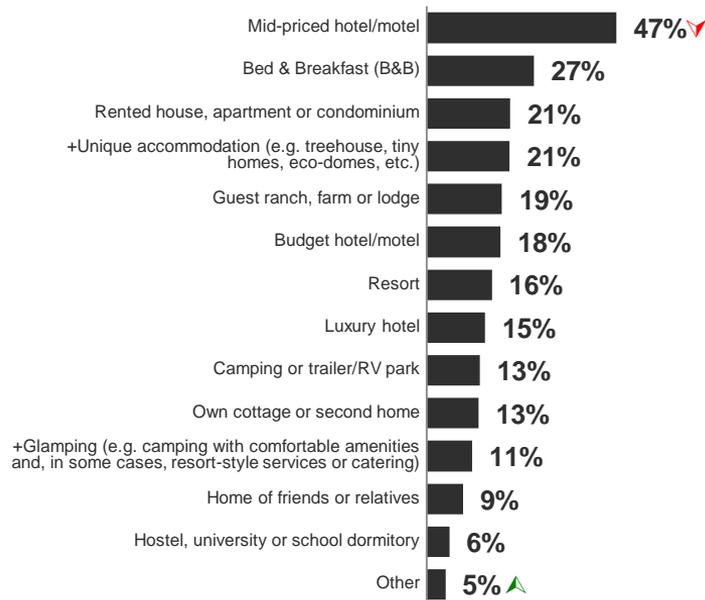
Trip Type



▲ / ▼ Significantly higher/lower than 2020 GTW wave.

Base: Long-haul pleasure travellers (past 3 years or next 2 years) considering Canada (n=555) FT9. What type of trip do you think you would be most likely to book for a trip to [destination]? (Select one)

Type of Accommodation



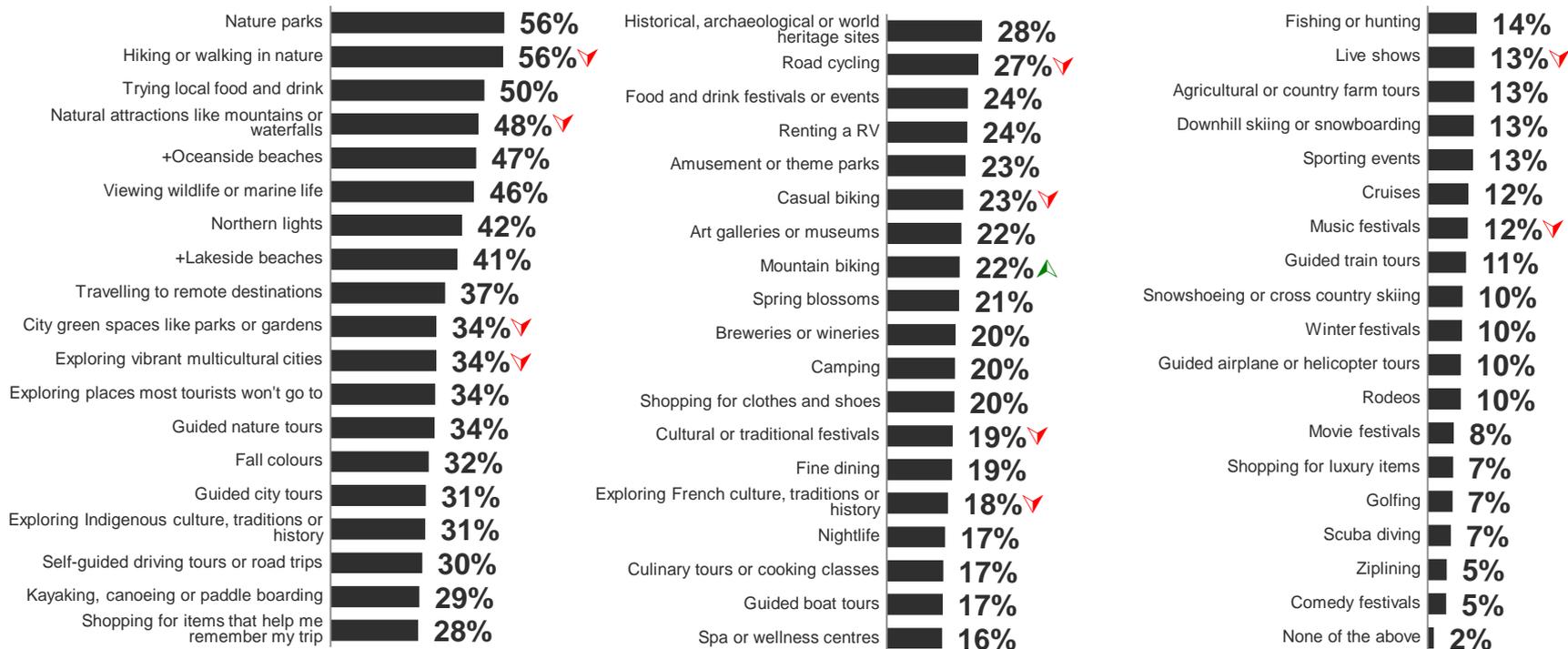
▲ / ▼ Significantly higher/lower than 2020 GTW wave.

+ New statement in 2021 GTW – no trending.

Base: Long-haul pleasure travellers (past 3 years or next 2 years) considering Canada (n=555) FT10. Which types of accommodation would you consider staying at during a trip to [destination]? (Select all that apply)

Activities Interested in on Future Trip to Canada

► While there is still a strong preference among German travellers for nature-based activities on a trip to Canada, interest in some of those top activities, such as hiking/walking in nature and natural attractions like mountains or waterfalls, has fallen relative to 2020.



▲ / ▼ Significantly higher/lower than 2020 GTW wave.

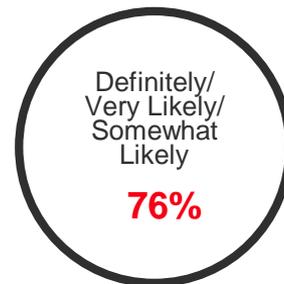
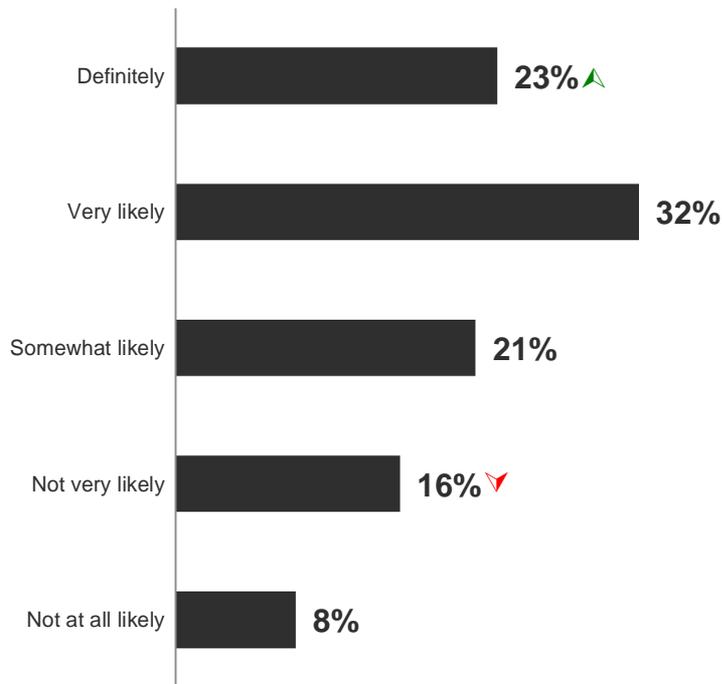
+ New statement in 2021 GTW – no trending.

Base: Long-haul pleasure travellers (past 3 years or next 2 years) considering Canada (n=555)

FT11. What activities would you be interested in participating in during a trip to Canada? (Select all that apply)

Travel Agent Usage for Future

- ▶ Travel agents and tour operators play a substantial role in supporting travel from Germany to Canada. Three-quarters of potential German visitors indicate that they are likely to use a travel agent to research or book a trip to Canada, with the proportion saying “definitely” increasing since 2020.



▲ / ▼ Significantly higher/lower than 2020 GTW wave.

Base: Long-haul pleasure travellers (past 3 years or next 2 years) considering Canada (n=555)

FT6. 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. How likely are you to use a travel agent or tour operator to help you research or book a trip to [destination]?