



5.5 million German long-haul leisure travellers intend to visit Canada in the next two years.

2018 Performance



2018 Arrivals¹
405,980
(↑1.2%)



2018 Average Trip Spend²
\$1,720

Key Insights

- Annual arrivals from Germany in 2018 (406K, +1%) just surpassed 2017 levels, making it the best year for German arrivals to Canada since the peak in 1996 (454K arrivals).¹
- 2018's slightly subdued growth compared to 2017 was most apparent in decreased air arrivals via the US, as visitors arriving by all other modes of entry increased overall in 2018.¹
- In 2018, the purchasing power of the Euro relative to the Canadian Dollar (+5% compared to 2017) helped position Canada as a more attractive travel destination for German travellers.⁴

2019 Forecast



Visitor Forecast²
420,190
(↑3.5%)



Spend Forecast (CAD)²
\$689 M
(↑4.1%)



Air Seat Capacity Growth³
↑4.2%

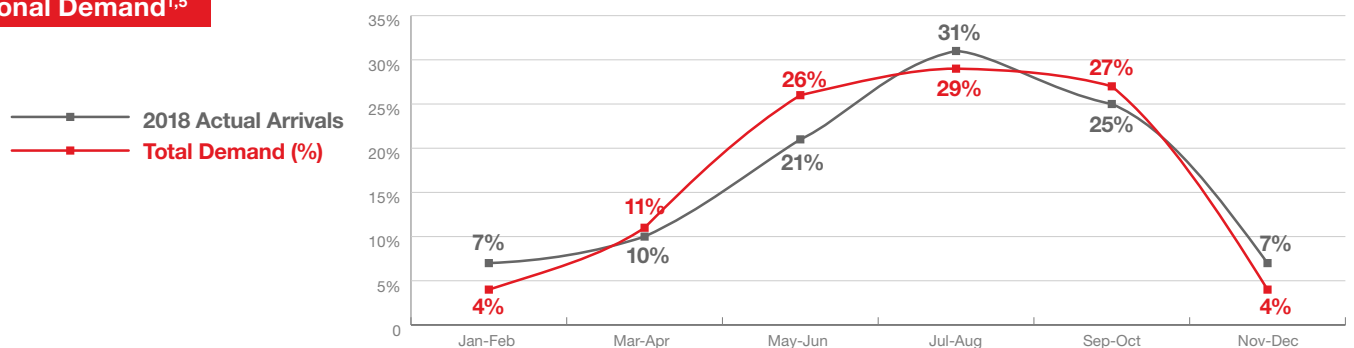


Local Currency vs. CAD⁴
↓3.1%

Market Insights

- In 2018, interest in travel to Canada was highest among German leisure travellers between May and October.⁵
- Top experiences German leisure travellers desire while on holiday include sampling local food and drink, summer and fall outdoor experiences, exploring Indigenous culture, city tours and exploring places other tourists won't go.⁵
- The majority of German leisure travellers on their most recent trip to Canada (60%) did not travel in an organized group travel package. Among those that did, relatively similar proportions booked these trips either online or in-person.⁵

Seasonal Demand^{1,5}



¹ Statistics Canada, Frontier Counts, 2018.

² Destination Canada Research estimates, using Statistics Canada preliminary 2018 Q1-Q3 VTS, 2017 ITS Q4, Frontier Counts, National Tourism Indicators, Bank of Canada and visitor forecasts from Destination Canada 2019 Forecast.

³ IATA SRS Analyzer Data, March 2018.

⁴ Bank of Canada.

⁵ Global Tourism Watch 2018.



Market Potential⁵



Canada's target market
13,181,000



42%
are definitely/very likely to visit
Canada in the next 2 years

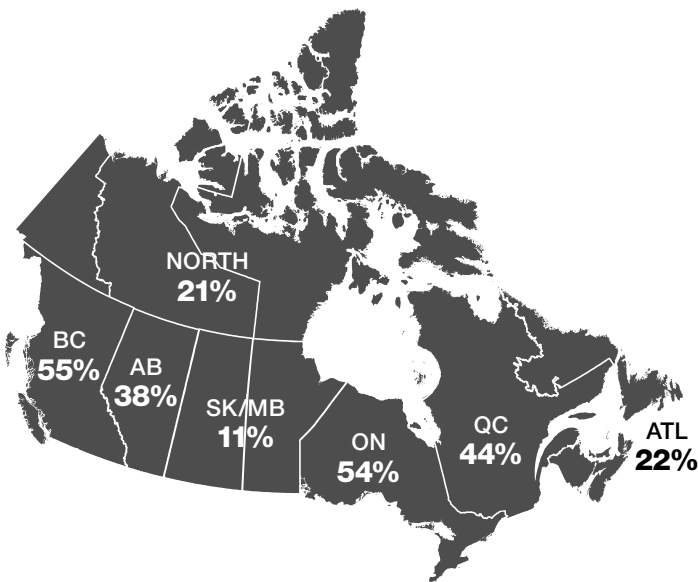


5,496,500
Canada's immediate potential

Top Drivers for German Travellers to Any Destination⁵

- 1 Is a safe place to visit
- 2 Offers adventures that everyone can enjoy
- 3 Has people that are friendly and welcoming
- 4 Is a place to spend quality time with friends and/or family
- 5 Offers distinctive experiences during all 4 seasons
- 6 Is a place I would be proud to tell people I have visited
- 7 Offers adventures that challenge me
- 8 Is a place that allows me to de-stress
- 9 Has great summer outdoor activities I would participate in
- 10 Is a great place for touring around to multiple destinations

Travel Consideration by Province,
% Likely to Visit Region⁵



Travel Agent/Tour Operator Usage
For Recent Trip to Canada⁵

Used for either research <u>or</u> booking	64%
Used for both research <u>and</u> booking	28%
Used for research <u>only</u>	26%
Used for booking <u>only</u>	10%

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⁵ Global Tourism Watch 2018.