

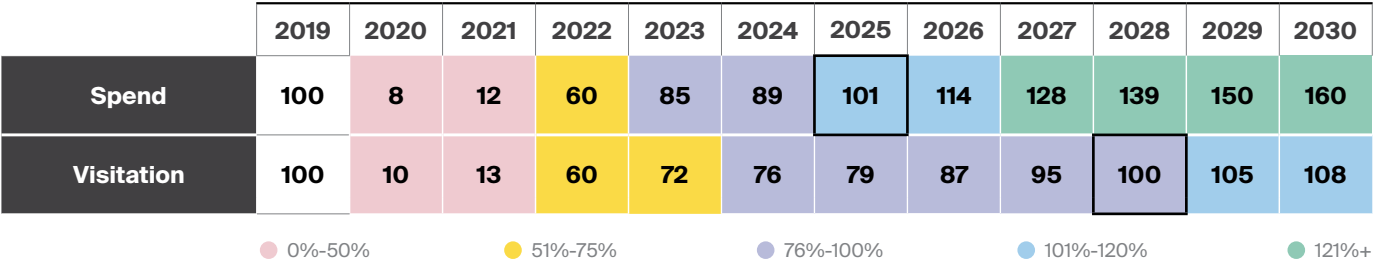


Germany remains a top-five market for Canada, with German travellers’ love of nature driving dispersion across Canadian communities.

While Germany’s recovery has been slower than other European markets, momentum is building. Visitor spending is expected to return to 2019 levels by 2025, with visitation forecasted to follow by 2028 – a key milestone in Canada’s long-haul strategy.

- The Euro’s strength against the Canadian dollar has improved the value proposition for German travelers, with continued gains expected in 2025.
- Economic conditions in Germany are projected to improve moderately, supporting steady growth in outbound travel.
- Spending is forecasted to rise 13.6% in 2025 and another 13.4% in 2026.
- Visitor arrivals are expected to increase by 5.0% in 2025 and 9.9% in 2026.
- By 2026, Canada is projected to welcome 362,700 German visitors, who will spend \$892 million.

Spending and visitation levels (% relative to 2019)¹

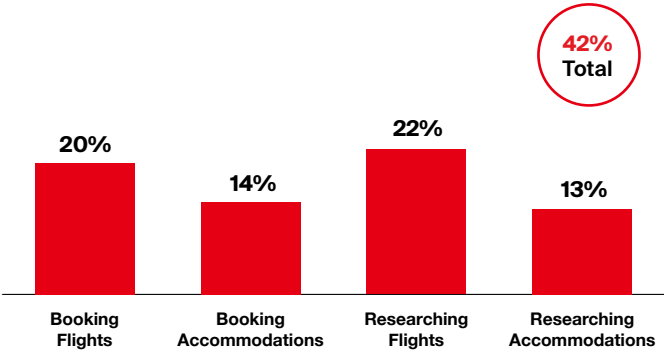


There is an unprecedented economic opportunity from a growing tourism industry, but there is significant potential for disruption in 2025. To remain resilient, our industry must reinforce that Canada remains open and friendly.

Potential Market Size²




Use Travel Agent on Canada Trip²





In Germany, there are two key priority segments selected through advanced analysis of their alignment to Canada’s product offerings, their potential economic impact, brand alignment, and their ability to benefit Canadian communities.



Germany Priority Segment

REFINED GLOBETROTTERS

% Of Germany Adult Population

11%

% Of Germany Visitors to Canada

20%

% Of Germany Spend to Canada

24%

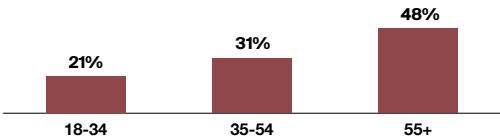
We prioritize travel above all, indulging in world-class destinations, gourmet dining, and exclusive experiences. We are experienced travellers who are always on the lookout for new, unique places to cross of our list.


TOP CANADA ACTIVITIES

- Local Cuisine
- Cultural Experiences & Attractions
- Health and Wellness
- Guided Tours

| Type of Travel Trade | Level of Use (compared to rest of market) |
|-----------------------------------|---|
| Travel Trade for group travel | ★★★★★ (High) |
| Travel Trade for non-group travel | ★★★★★ (Very High) |

AGE





Germany Priority Segment

OUTDOOR EXPLORERS

% Of Germany Adult Population

14%

% Of Germany Visitors to Canada

28%

% Of Germany Spend to Canada

29%

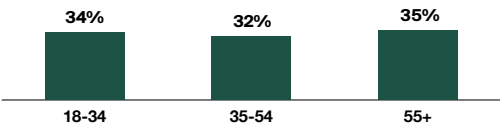
We are nature explorers who crave the thrill of unknown landscapes and overcoming challenges. Adventure travel allows us to grow, learn new skills, and establish personal traditions.

TOP CANADA ACTIVITIES

- Nature Experiences
- High-intensity Sports
- Water / Winter Based Sports
- Casual Sports

| Type of Travel Trade | Level of Use (compared to rest of market) |
|-----------------------------------|---|
| Travel Trade for group travel | ★★★★★ (High) |
| Travel Trade for non-group travel | ★★★★★ (Low) |

AGE



Source: Destination Canada Traveller Segmentation Program 2024

Note: Segment sizing estimates will differ from those in the Global Traveller Research Program (GTRP), which applies stricter screening criteria—specifically a more narrowly defined long-haul traveller profile.

For further information, please contact:

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