



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

	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030
Spend	100	8	12	60	85	89	101	114	128	139	150	160
Visitation	100	10	13	60	72	76	79	87	95	100	105	108

● 0%-50%
 ● 51%-75%
 ● 76%-100%
 ● 101%-120%
 ● 121%+

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

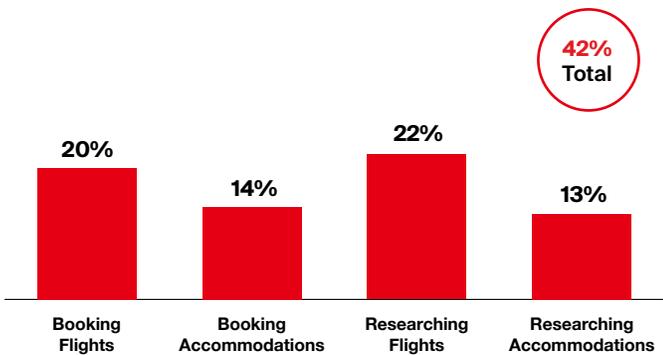


Total potential for long-haul travellers

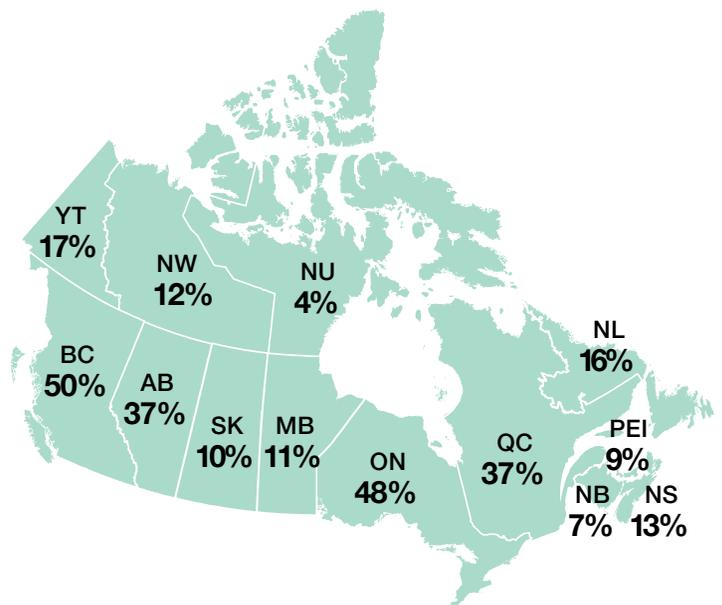


Canada's immediate potential

Use Travel Agent on Canada Trip²



Likelihood to Visit Canadian Regions (Next 2 Years)



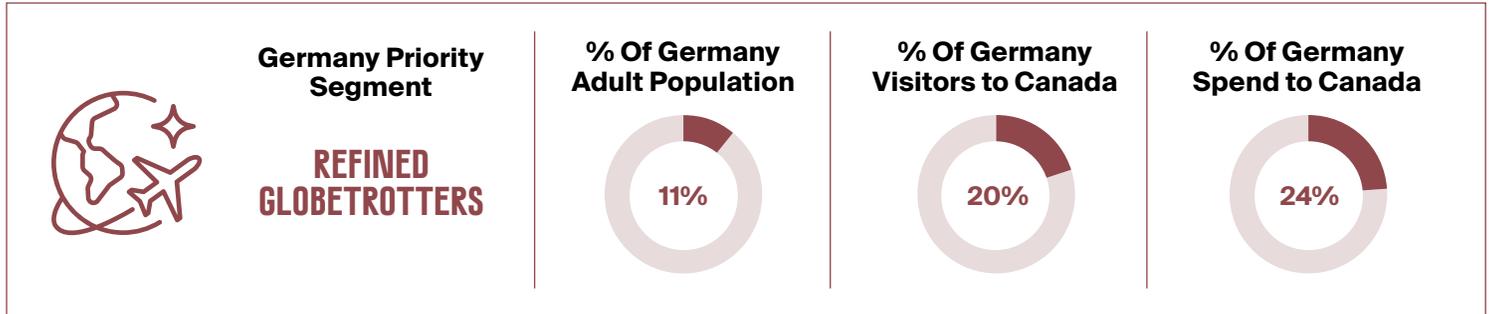
The DC Tourism Outlook Fall 2023 has been adjusted from 2023 to 2025 to reflect the latest arrival numbers.

¹ Destination Canada Tourism Outlook 2025-2030

² Destination Canada Global Traveller Research Program 2024



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.



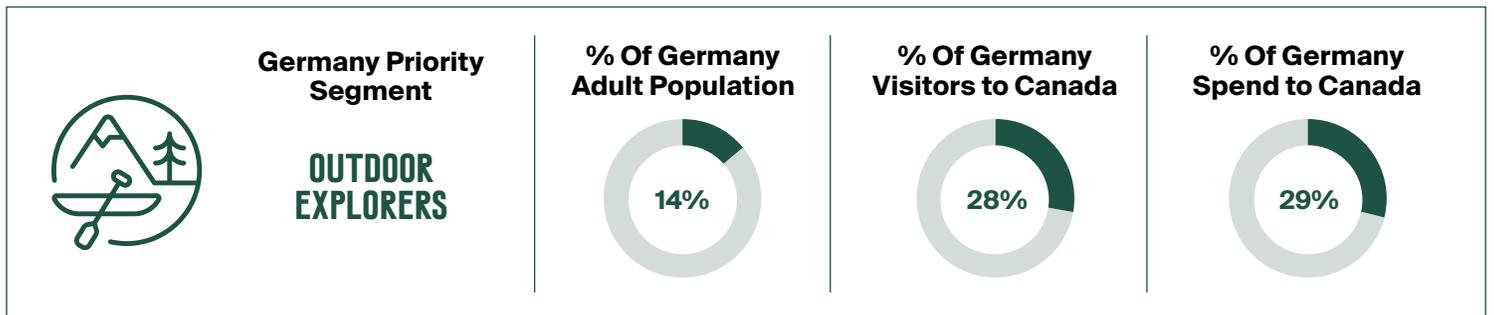
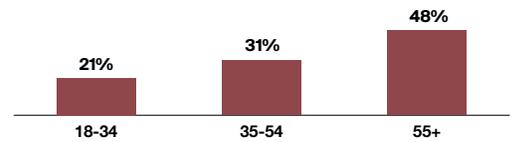
We prioritize travel above all, indulging in world-class destinations, gourmet dining, and exclusive experiences. We are experienced travellers who are always on the lookout for new, unique places to cross of our list.

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



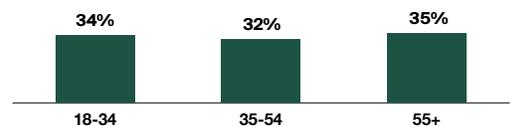
We are nature explorers who crave the thrill of unknown landscapes and overcoming challenges. Adventure travel allows us to grow, learn new skills, and establish personal traditions.

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)

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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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