



INTERNATIONAL MARKET FOCUS

GERMANY

Fall 2023

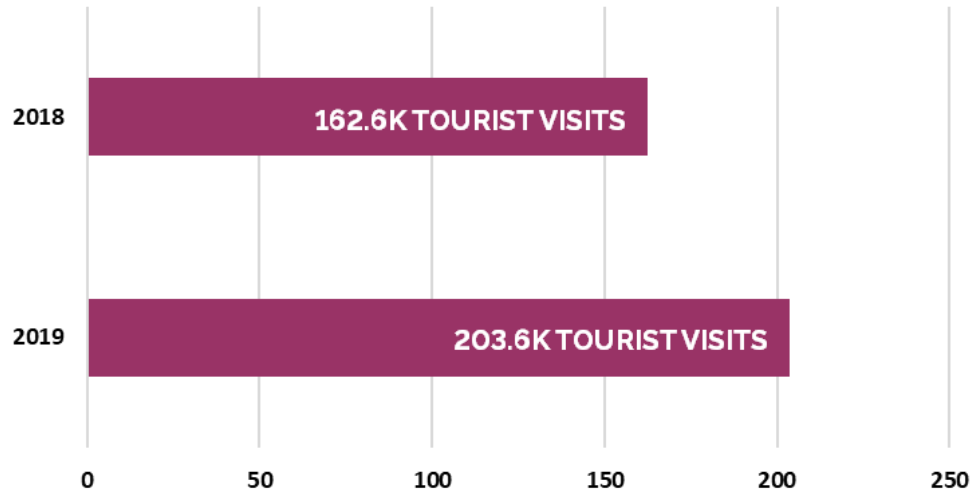
DESTINATION
ONTARIO



MARKET SIZE

- There were **203,600 tourist visits from Germany to Ontario** in 2019 (+25% over 2018).
- On average, German tourists stayed **14 nights** per overnight Ontario visit in 2019.
- Germany accounted for **6% of all overseas visits to Ontario** in 2019, up from 5% in 2018.

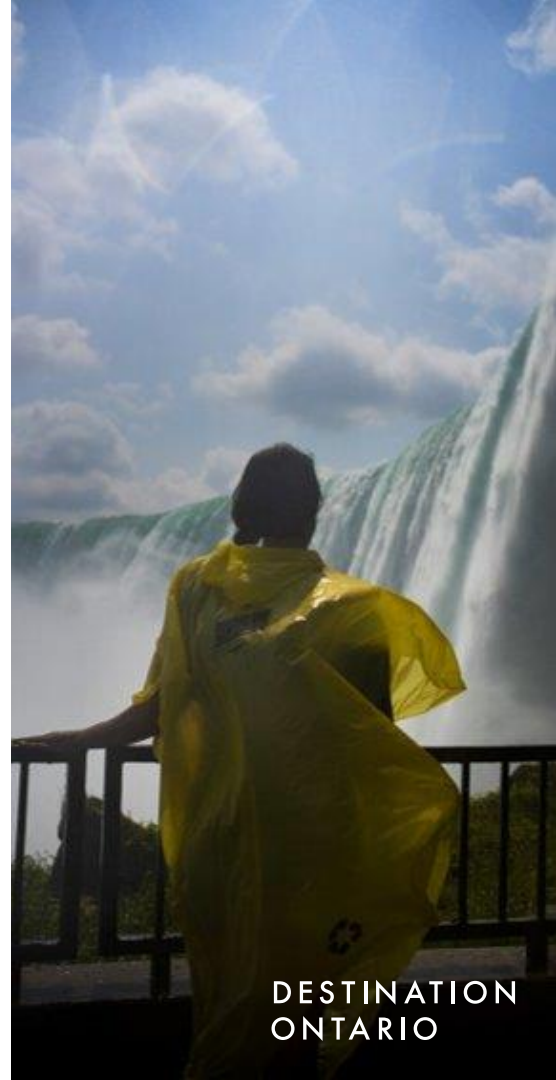
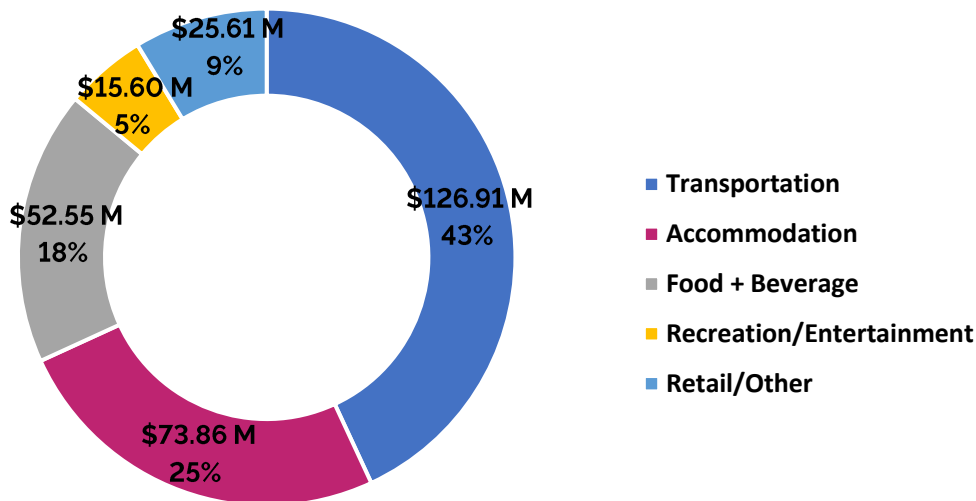
VISITS FROM GERMANY IN ONTARIO



VISITOR SPENDING

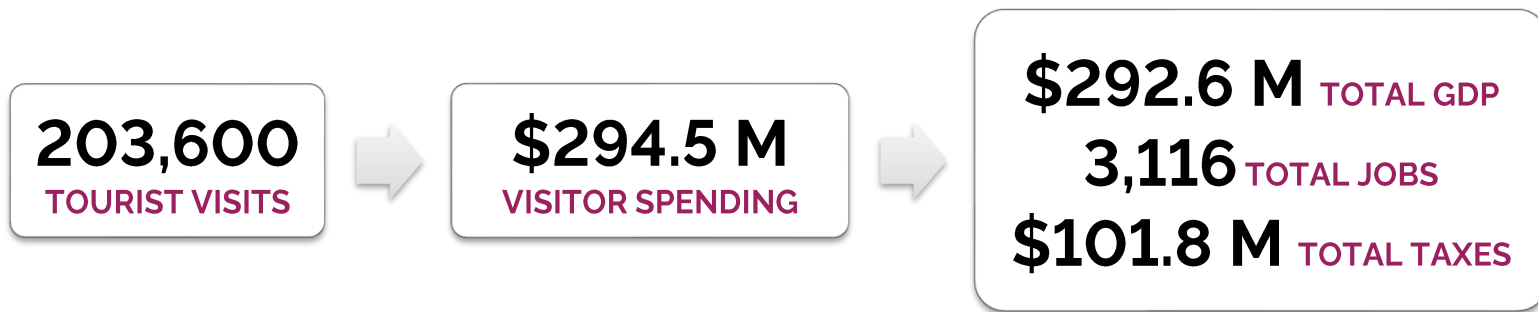
- German visitor spending in Ontario totalled **\$294.5 million** in 2019 (+15% from 2018).
- Germany accounted for **5% of overseas spending in Ontario** in 2019.
- Tourists from Germany spent an average of **\$1,446 per visit in Ontario** in 2019 – **6.5 times more** than the average spend per visit in Ontario. The largest share of visitor spending was on **transportation (43%)**.
- Destination Canada has estimated that it may take until 2024 for German tourism spending in Canada to recover to 2019 levels.

GERMAN SPENDING BY CATEGORY: 2019



THE VALUE OF THE GERMAN TRAVELLER

ECONOMIC IMPACT OF VISITOR SPENDING FROM GERMANY IN ONTARIO (2019)



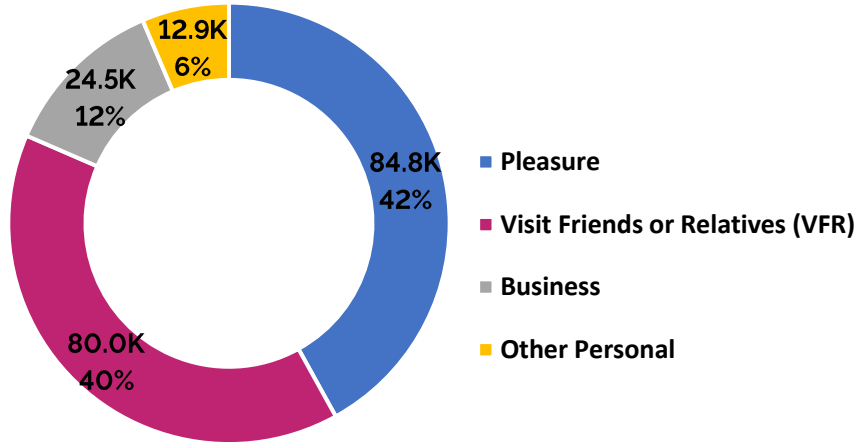
Source: Statistics Canada, Visitor Travel Survey (2019) and the Ontario Ministry of Tourism, Culture and Sport's Tourism Regional Economic Impact Model



TRIP CHARACTERISTICS

- **42%** of tourist visits from Germany to Ontario were taken for **pleasure**

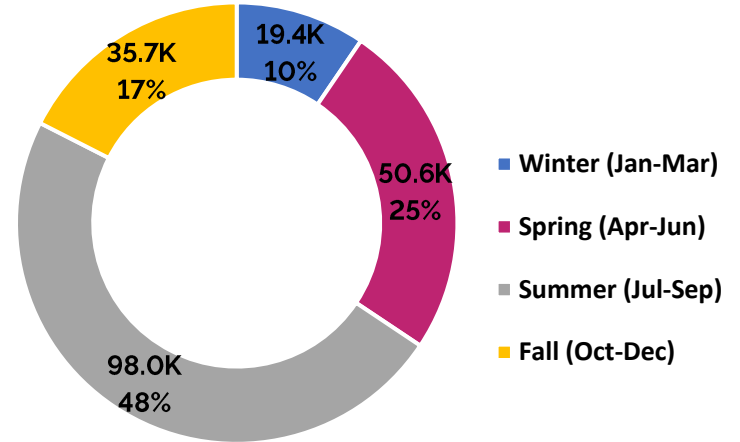
MAIN PURPOSE OF VISIT FROM GERMANY: 2019



Source: Statistics Canada, Visitor Travel Survey

- **48%** of tourist visits from Germany to Ontario occurred in the **summer**

GERMANY SEASON OF VISIT: 2019



TRIP CHARACTERISTICS

TOP TRIP ACTIVITIES IN ONTARIO (2019)

TRIP ACTIVITY	% GERMAN VISITS IN ONTARIO
Restaurant, bar or club	87%
Sightseeing	80%
Shopping	70%
Visit friends or family	49%
Historic site	48%

Source: Statistics Canada, Visitor Travel Survey

TOP TOURISM REGIONS VISITED (2019)

TOURISM REGION	% GERMAN VISITS IN ONTARIO
Region 5: Greater Toronto Area	69%
Region 2: Niagara Canada	35%
Region 10: Ottawa and Countryside	35%
Region 9: Southeastern Ontario	10%
Region 12: Muskoka, Parry Sound + Algonquin Park	8%

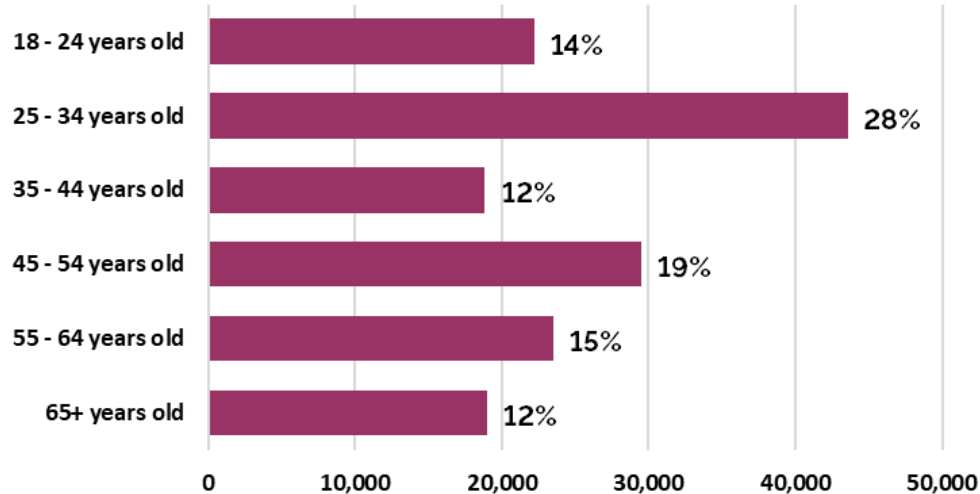


DESTINATION
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DEMOGRAPHICS

- The largest share of German tourist visits to Ontario was from those aged 25-34 years old in 2019 (28%). **The average age of a German tourist to Ontario was 43.**
- 7% of travel parties from Germany to Ontario had children travelling with them in 2019.
- Of those who stated their gender, slightly more than half (54%) of visits from Germany to Ontario were taken by men in 2019.

GERMAN VISITS TO ONTARIO BY AGE STATED (18+): 2019



POTENTIAL MARKET SIZE FOR CANADA



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



Source: Destination Canada 2022 Global Markets Traveller Incidence & Market Sizing Update

[^] Long-haul = outside of Europe, North Africa and the Mediterranean | ¹ Includes respondents likely to visit Canada for a trip of 1 to 3 nights, or a trip of 4 nights or more





DESTINATION
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