



**CONTEXT IS EVERYTHING**

## 2026 GERMANY CONSUMER RESEARCH

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**CONTEXT IS EVERYTHING**

## KEY OBJECTIVES

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📍 Hopewell Rocks, NB

### Overview:

Context Research Group (CRG) partnered with the Atlantic Canada Agreement on Tourism (ACAT) and the Tourism Industry Association of Prince Edward Island (TIAPEI) to conduct a market intelligence study examining German travellers' perceptions of Atlantic Canada as a long-haul travel destination. The research aims to better understand how travellers in Germany perceive the Atlantic Canadian provinces and to assess the region's positioning within a competitive international tourism landscape. The findings will provide ACAT and its provincial partners with actionable insights to strengthen marketing strategies, enhance destination positioning, and better align tourism offerings with the expectations of German travellers.

### Objectives:

The objectives of this survey are to evaluate:

- Assess awareness and perceptions of Atlantic Canada and its provinces among German long-haul travellers.
- Understand travel behaviours, including previous trips to Canada, travel patterns, and experiences with Atlantic Canada.
- Evaluate future travel intent and trip planning, including likelihood of visiting Atlantic Canada and potential multi-province travel.
- Identify key drivers and barriers to travel, including motivations, accessibility considerations, and broader geopolitical perceptions.

## METHODOLOGY

📍 Hopewell Rocks, NB

### Methodology:

- CAWI (Computer-Assisted Web Interview)

### Qualifying Criteria:

- Adults aged 18+ residing in Germany
- Have taken at least one long-haul leisure trip outside Europe in the past three years or plan to take one within the next two years.

### Sample Size:

- Total: n=1,012
- Have not visited Canada: n=607
- Visited Canada in the past 5-10 years: n=101
- Visited Canada in the past 5 years: n=304

### Fieldwork Date:

- February 8 – February 20, 2026

### Median Length of Interview:

- 13.3 minutes

### Weighting:

- Results are weighted by age and gender to ensure alignment with relevant traveller populations.
- Those who have not visited to Canada are weighted to reflect the German long-haul traveller population using Destination Canada's Global Tourism Research Program (GTRP), 2024 Germany market data
- Those who have visited Canada are weighted to reflect the profile of German visitors using Statistics Canada's Visitor Travel Survey (VTS), 2023.

## METHODOLOGY

📍 Hopewell Rocks, NB

### Margin of Error:

- $\pm 3.1\%$

### Rounding:

Due to rounding, the numbers may not add up to the totals. For example, the sum of all values may add up to 99% or 101%.

### Significance Testing:

- Statistically significant differences (at the 95% confidence level) are stated throughout the report where possible.
- Proportions are compared using two-tailed non-parametric tests, and averages are compared using two-tailed t-tests.

### Reporting Considerations:

Throughout the report, significant differences by market and traveller segment are highlighted where relevant.

### Regions:

#### *West Germany*

- Hesse (Hessen)
- North Rhine-Westphalia (Nordrhein-Westfalen)
- Rhineland-Palatinate (Rheinland-Pfalz)
- Saarland

#### *North Germany*

- Bremen
- Hamburg
- Lower Saxony (Niedersachsen)
- Schleswig-Holstein

#### *East Germany*

- Berlin
- Brandenburg
- Mecklenburg-Western Pomerania (Mecklenburg-Vorpommern)
- Saxony (Sachsen)
- Saxony-Anhalt (Sachsen-Anhalt)
- Thuringia (Thüringen)

#### *South Germany*

- Baden-Württemberg
- Bavaria (Bayern)

## DESTINATION CANADA TRAVELLER SEGMENTS

📍 Hopewell Rocks, NB

### Overview

In 2024, Destination Canada (DC) launched their Traveller Segmentation Program. The Program defines and classifies travellers from target markets—both international and domestic—into seven key segments based on a combination of behavioral values—trip spend, travel frequency, seasonal preferences and activities—and psychographic factors such as emotional motivations and core travel values. (See next slide for description of the segments)

### Rationale

Destination Canada's segmentation framework provides a national-level understanding of key traveller segments visiting Canada. To complement this perspective, this study applies the framework to explore how these segments engage with specific Atlantic Canadian provinces, including New Brunswick, Newfoundland & Labrador, Nova Scotia, and Prince Edward Island.

By aligning with Destination Canada's framework, the study ensures consistency with national tourism research, while generating insights that support more targeted destination marketing, product development, and strategic planning for Atlantic Canadian tourism partners.

## DESTINATION CANADA TRAVELLER SEGMENTS

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📍 Hopewell Rocks, NB

### **Outdoor Explorers**

Travellers motivated by nature, wildlife, and outdoor adventure who seek scenic landscapes and active experiences in natural environments.

### **Culture Seekers**

Travellers interested in learning about local culture, history, traditions, and festivals, often seeking authentic connections with destinations and communities.

### **Refined Globetrotters**

Experienced travellers who value high-quality, curated travel experiences, including guided tours, unique attractions, and food and drink experiences.

### **Purpose-Driven Families**

Families travelling with children who prioritize meaningful shared experiences, family-friendly attractions, and opportunities to spend quality time together.

## DESTINATION CANADA TRAVELLER SEGMENTS – CONTINUED

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📍 Hopewell Rocks, NB

### **City Trippers**

Travellers drawn to urban destinations offering cultural attractions, shopping, dining, and entertainment.

### **Simplicity Lovers**

Travellers who prefer relaxed and uncomplicated trips focused on comfort, easy travel logistics, and opportunities to unwind.

### **Fun & Sun Families**

Families seeking easy, enjoyable vacations centered on leisure, family-friendly activities, and relaxed experiences.

# EXECUTIVE SUMMARY

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📍 Cape Breton Island, NS

## **A Strong Long-Haul Market with Experience in Canada**

German travellers represent a highly valuable long-haul market for Canada. Many already have experience travelling internationally and are comfortable planning longer, multi-destination trips. Those who have previously visited Canada stand out as especially important, as they tend to travel more frequently and are more open to exploring different regions on return visits. This pattern positions Atlantic Canada well as a destination that can benefit from repeat travel and deeper exploration of the country.

## **Awareness Is Uneven, but Perceptions Are Already Positive**

Awareness of Atlantic Canada varies across the region and remains closely tied to prior experience with Canada. Newfoundland & Labrador and Nova Scotia are the most recognized provinces. Despite this, perceptions are highly positive once travellers become aware of the region. Atlantic Canada is consistently described as appealing, indicating the core challenge is not improving the product, but increasing visibility and familiarity.

## **Interest Grows as Travellers Become More Familiar with Canada**

Interest in visiting Atlantic Canada is strongest among travellers who have already visited Canada. Nova Scotia and Newfoundland & Labrador lead consideration, while younger travellers show particularly strong interest. Most travellers imagine visiting several provinces in a single trip, suggesting Atlantic Canada is best positioned as a connected regional experience rather than as four individual destinations.

## **Nature and Authentic Experiences Drive Appeal**

Atlantic Canada's strongest motivators closely match the reasons Germans travel to Canada in the first place. Scenic landscapes, wildlife, outdoor exploration, and discovering unique places stand out as the most compelling experiences. Cultural elements further enhance the region's appeal. Together, these attributes create a destination that feels authentic and immersive, aligning strongly with travellers seeking meaningful and memorable travel experiences.

## **The Main Barrier Is Awareness, Not Appeal**

Barriers to visiting Atlantic Canada are driven primarily by limited familiarity. Many travellers simply know less about the region compared with other parts of Canada. Cost and travel distance are mentioned but play a secondary role. Once travellers are exposed to the region's landscapes, experiences, and culture, interest increases significantly. This suggests that improved storytelling and clearer visibility could meaningfully increase consideration.

## **Planning Behaviour Highlights the Need for Clear Travel Guidance**

Travellers planning a trip to Atlantic Canada typically begin researching well in advance and rely heavily on online search and official tourism websites. Travel agents also remain important, particularly when arranging flights or more complex itineraries. Awareness of direct flight options is uneven. Providing clear, practical planning information will be essential to turning interest into actual bookings.

## **Atlantic Canada Aligns with Germany's High-Value Travellers**

Atlantic Canada resonates strongly with several high-value traveller segments in Germany. While Destination Canada typically identifies Outdoor Explorers and Refined Globetrotters as priority segments, the results show the region also strongly attracts Culture Seekers. Across provinces, potential visitors are drawn by a mix of nature, culture, and authentic local experiences. This combination positions Atlantic Canada well as a destination for travellers seeking deeper, more immersive journeys beyond traditional tourism hotspots.



## Considering Visiting in the Next Two Years

Have Visited Canada: 59%

Have not Visited Canada: 41%

**German travellers considering New Brunswick are primarily drawn by nature-based and scenic experiences, particularly visiting parks, exploring coastal towns, wildlife viewing, and experiencing Indigenous culture and local heritage.** These elements strongly shape the province's appeal as a destination offering authentic landscapes and culturally rooted experiences. Culinary discovery, historical sites, and iconic experiences such as seeing the world's highest tides further reinforce New Brunswick's appeal, though they more often act as complementary motivations that enrich the overall travel experience rather than serving as the primary drivers of travel.

**From a travel planning perspective, ease of transportation throughout the province emerges as the most important consideration when evaluating a visit.** Travellers also place strong emphasis on the perception of the destination as welcoming and inclusive, as well as the ability to combine multiple Atlantic provinces within a single trip. This reflects the touring nature of long-haul travel from Germany, where travellers frequently explore several destinations across Canada in one itinerary.

**Travellers interested in New Brunswick are most commonly Outdoor Explorers and Culture Seekers.** These segments are motivated by opportunities to connect with nature, experience authentic local culture, and enjoy meaningful travel experiences with others. Outdoor Explorers are particularly drawn to destinations offering wildlife viewing, scenic natural environments, and opportunities for outdoor adventure, while Culture Seekers value heritage, local traditions, and opportunities to engage with communities through food, festivals, and cultural attractions. Together, these segments highlight New Brunswick's positioning as a destination combining natural beauty with cultural depth and welcoming communities.



## Considering Visiting in the Next Two Years

Have Visited Canada: 68%

Have not Visited Canada: 53%

**Newfoundland & Labrador appeals strongly to German travellers seeking distinctive landscapes, wildlife encounters, and immersive outdoor exploration.** Experiences such as visiting parks, exploring rugged coastal scenery, and observing wildlife are among the most influential motivations shaping travel interest in the province. Cultural experiences, including Indigenous culture and local heritage, along with culinary discovery and historical sites, add further richness to the destination's appeal. Unique experiences such as viewing icebergs and dramatic ocean landscapes reinforce the province's positioning as a destination offering rare and memorable travel experiences that differ from more conventional long-haul destinations.

**When planning travel to the province, German travellers place significant importance on ease of transportation within Newfoundland & Labrador, reflecting the province's large geography and the importance of being able to explore its landscapes efficiently.** Travellers also emphasize the ability to visit multiple Atlantic provinces within the same trip, reinforcing the role of Newfoundland & Labrador within broader regional itineraries.

**Travellers interested in Newfoundland & Labrador are most commonly Outdoor Explorers and Culture Seekers.** These segments are motivated by opportunities to experience dramatic natural landscapes, connect with local culture, and engage in meaningful and authentic travel experiences. Outdoor Explorers are particularly drawn to destinations offering unique natural wonders, wildlife viewing, and immersive outdoor exploration in environments that are not overly crowded, while Culture Seekers value rich cultural heritage, local traditions, and opportunities to connect with communities through cuisine, storytelling, festivals, and cultural attractions. Together, these segments highlight the province's positioning as a destination combining spectacular natural environments with distinctive culture and authentic local experiences.



## Considering Visiting in the Next Two Years

Have Visited Canada: 69%

Have not Visited Canada: 53%

**Nova Scotia demonstrates broad and balanced appeal among German travellers, with strong interest in sightseeing, exploring coastal towns, visiting parks, wildlife viewing, and experiencing Indigenous culture and heritage.** These motivations position the province as a destination where travellers can experience both natural beauty and cultural richness within a relatively accessible and diverse landscape. Outdoor activities such as hiking and trail walking further reinforce the province's appeal for travellers seeking active experiences in scenic environments, while culinary discovery and historical sites add additional layers of cultural interest.

**For travellers considering Nova Scotia, the ability to arrange transportation throughout the province is the most important planning consideration, highlighting the importance of being able to comfortably explore different regions, coastal routes, and communities.** The ability to visit multiple Atlantic provinces within the same trip is also a key factor for many travellers, reflecting interest in experiencing several destinations as part of a broader Atlantic Canada journey. In addition, the perception of the destination as welcoming and inclusive plays an important role in shaping travel decisions, reinforcing the importance of positive destination reputation alongside practical travel considerations.

**Travellers interested in Nova Scotia are most commonly Outdoor Explorers and Culture Seekers, segments that value destinations offering a blend of nature, culture, and authentic local experiences.** Outdoor Explorers are drawn to the province's coastal scenery, wildlife viewing opportunities, and outdoor activities, while Culture Seekers are motivated by opportunities to experience heritage, local traditions, and cultural attractions. Together, these segments reinforce Nova Scotia's positioning as a destination where travellers can experience coastal landscapes, cultural heritage, and vibrant communities within a single trip.



♀ Basin Head, PEI

## Considering Visiting in the Next Two Years

Have Visited Canada: 64%

Have not Visited Canada: 44%

**Prince Edward Island appeals to German travellers through its scenic coastal landscapes, parks, and relaxed travel experiences, offering a destination that combines natural beauty with a slower pace of exploration.** Sightseeing and exploring distinctive coastal environments are among the strongest motivations to visit, followed by visiting parks, wildlife viewing, and experiencing Indigenous culture and heritage. Culinary experiences and local food traditions further enhance the province's appeal, positioning Prince Edward Island as a destination known for authentic local experiences and charming coastal environments.

**Travellers considering Prince Edward Island place strong importance on ease of travel within the province, reflecting a preference for destinations that are simple to explore and allow travellers to experience multiple attractions comfortably.** The perception of the destination as welcoming and friendly is also an important factor shaping travel decisions. As with other Atlantic provinces, many travellers plan to combine visits to Prince Edward Island with other destinations in Atlantic Canada, reinforcing the importance of regional itineraries that connect experiences across the provinces.

**Travellers interested in Prince Edward Island are most commonly Outdoor Explorers and Culture Seekers, drawn to destinations offering scenic landscapes, cultural authenticity, and opportunities to relax while exploring.** These travellers value destinations that provide natural beauty, authentic local experiences, and environments that are not overly crowded, aligning closely with the province's reputation for coastal charm, hospitality, and peaceful exploration.

## TRAVELLER BEHAVIOUR

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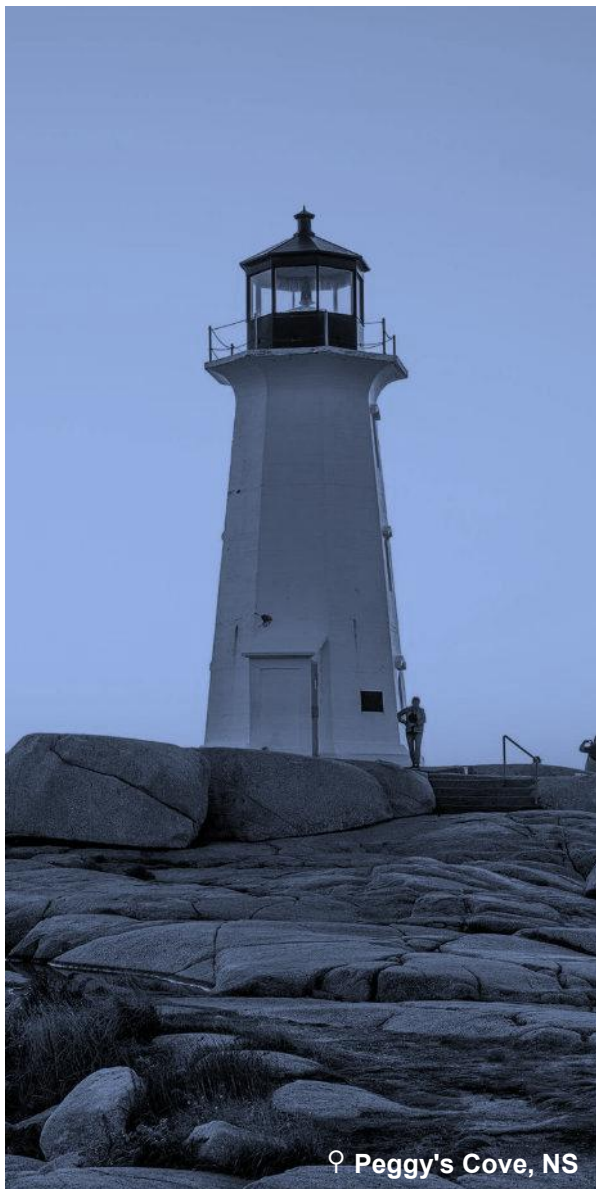
German long-haul travellers are active and internationally oriented, with Canada ranking as the second most visited destination outside Europe.

On average, travellers report 4.8 overnight trips over the past three years, though those who have visited Canada are notably more experienced travellers, averaging 6.6 trips, compared with lower travel activity among those who have not visited. This suggests that Canada attracts a segment of highly engaged travellers.

Visiting multiple Canadian destinations on a single trip is almost as common as spreading visits over several trips.

Within Atlantic Canada, Nova Scotia and Prince Edward Island are the most visited provinces, though travellers who have visited one Atlantic province are significantly more likely to have visited others, indicating that the region tends to be explored collectively over time.

Looking ahead, previous visitors remain the most promising market, and younger travellers (25–34) show the strongest likelihood of increasing future travel to Canada, highlighting an opportunity to build long-term demand.



♀ Peggy's Cove, NS

# PREVIOUS INTERNATIONAL LONG-HAUL TRAVEL

**Canada ranks as the second most visited destination for German travellers, after European destinations.**

Over the past three years, German travellers took an average of 4.8 overnight trips.

Those who visited Canada reported above-average travel activity, with 6.6 overnight trips, while those who did not visit Canada reported below-average travel activity.

Outdoor Explorers and Purpose Driven Families were more likely to have visited Canada than the other segments.

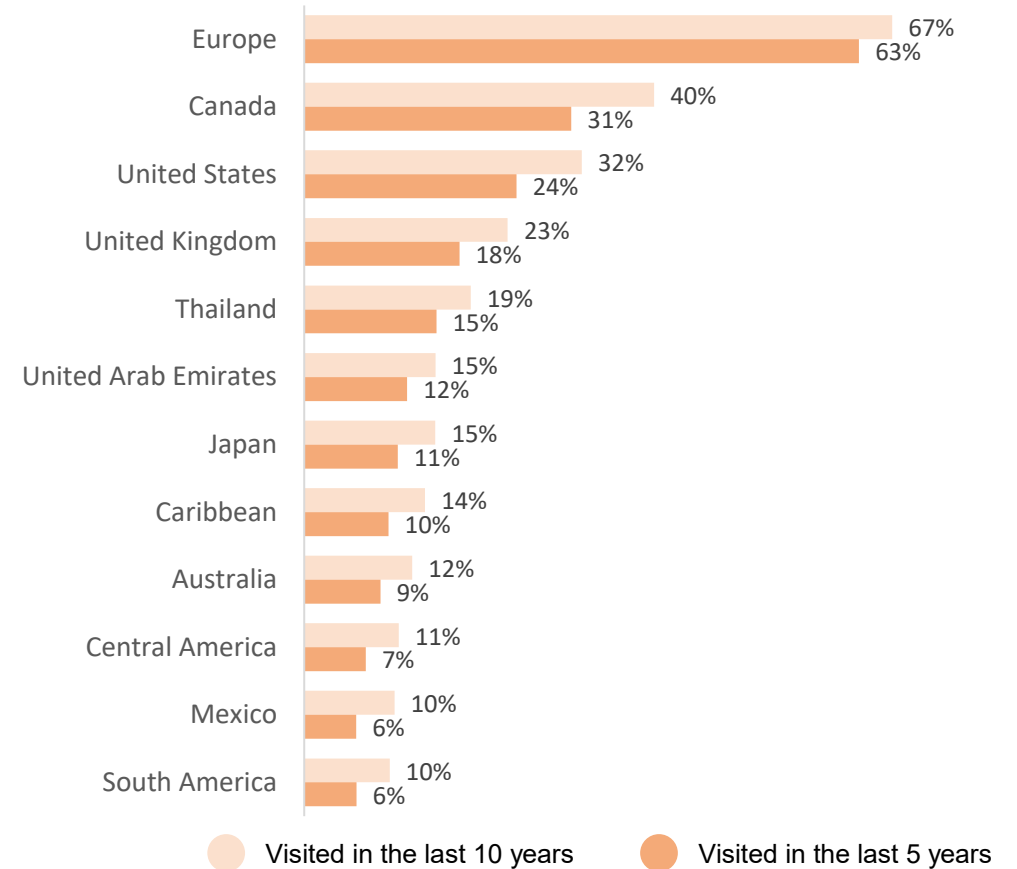
Those who have visited Canada before are also more likely to be 25-44 years old, have a household income of more than €60,000 and have a full-time job.

**Average Number of Trips Taken  
(in the last 3 years)**

**4.8**  
Overall

**6.6**  
Visited Canada  
in the Past

## Previously Visited Destinations



S7. How many separate long-haul leisure trips of four or more nights have you taken in the past three years outside Germany? (Numeric input)  
Respondents who have taken a trip in the past 3 years (n=921).

T1. Considering the long-haul leisure trips that you have taken in the past ten years, which destinations have you visited? (Multi-select)  
All respondents (n=1,012).

T1B. Thinking of the destinations you selected, which have you visited in the past 5 years? (Multi-select)  
Respondents who have taken a trip in the past 10 years (n=994).

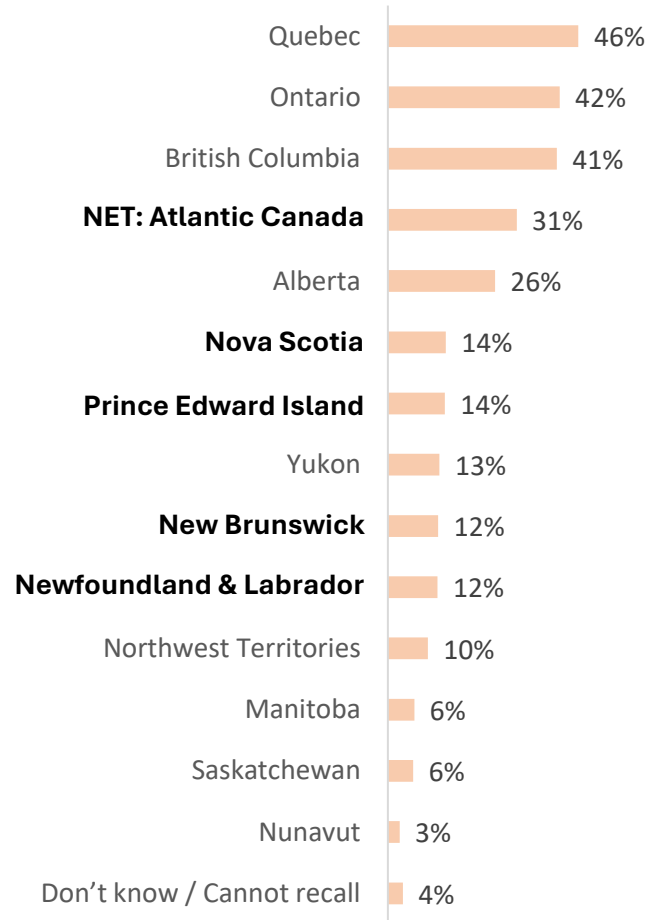
# PREVIOUS TRAVEL TO CANADA

Among those who have visited Canada before, around one in three have visited Atlantic Canada in the past, with roughly one in seven having visited each individual Atlantic province.

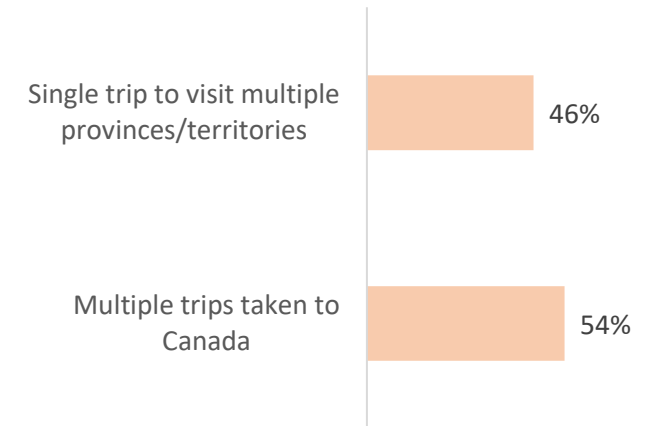
Visiting multiple Canadian destinations on a single trip is almost as common as spreading visits over several trips.

Travellers who visited an Atlantic Canadian province are also more likely to have visited others, suggesting that these destinations are often explored together across trips.

## Canadian Destinations Visited



## Among Those Who Visited Multiple Provinces...



T2. Which Canadian provinces/territories have you visited in the past five/ten years? (Multi-select)/ T3. And did you visit both/all of these provinces/territories as part of a single trip, or did you take multiple trips to Canada during this timeframe? (Single-select) Respondents who have visited Canada (n=405).

# LENGTH OF STAY ACROSS PROVINCES

On average, German travellers spent 12.6 nights in Canada during their visit.

Among those who visited each Atlantic province, the average number of nights spent in that province varies, with Newfoundland & Labrador recording the highest average (5.3 nights), followed by Nova Scotia (4.9), New Brunswick (3.6), and Prince Edward Island (3.4).

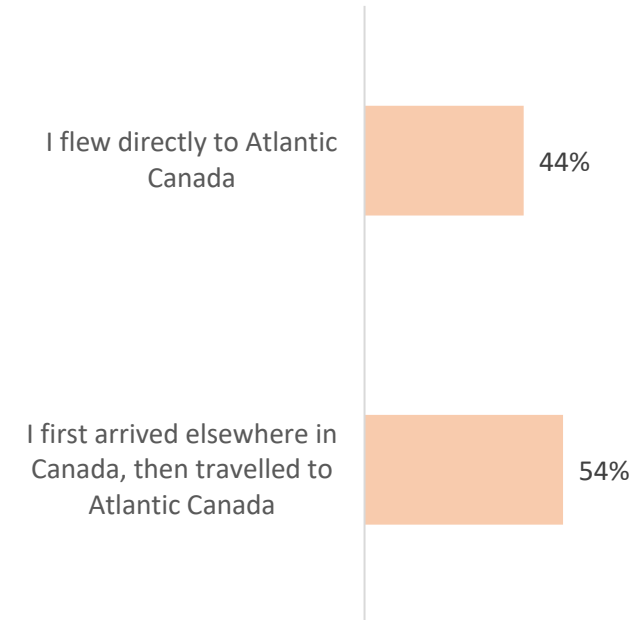
Average Nights Spent	
Canada	12.6
New Brunswick	3.6
Newfoundland & Labrador	5.3
Nova Scotia	4.9
Prince Edward Island	3.4

Note: Nights are based on respondents who visited each province; reflects nights spent in that province during a Canadian trip, which may include visits to multiple provinces.

Among German travellers visiting Atlantic Canada, direct flights to the region are just as common as flying into another Canadian destination first and then continuing to Atlantic Canada.

*Note: These figures reflect time spent in each province during a Canadian trip and do not imply that all provinces were visited on the same trip.*

## Among Those Who Visited Atlantic Canada...



T4. Thinking of your last trip to Canada, approximately how many nights were you in Canada on this trip? (Numeric input)  
 Respondents who have visited Canada (n=405).

T5. Again, thinking of your last trip and the [#] nights spent in Canada, how many nights were spent in Atlantic Canada? (Numeric input)/ T6B.  
 Thinking of your last trip to Canada where you visited Atlantic Canada, where did you first arrive by plane? (Single-select)  
 Respondents who have visited Atlantic Canada (n=127).

# CANADIAN TRIP SPENDING BUDGET

**German travellers spend an average of \$8,329 per trip when visiting Canada.**

Estimated spending within each Atlantic province ranges from approximately \$3,094 to \$3,680 per visit, with Newfoundland & Labrador generating the highest average spend.

*Estimated provincial spending was calculated by distributing total trip spending proportionally based on the share of nights spent in each province relative to the traveller's total nights in Canada.*

**Total Trip Spend to Canada  
(CAD)**

**\$8,329**

per party

## Estimated Spend Within Each Province (CAD)

New Brunswick	\$3,154
Newfoundland & Labrador	\$3,680
Nova Scotia	\$3,514
Prince Edward Island	\$3,094

T7. Again, thinking of your last trip to Canada, what was your total budget for this trip, in euros (€)? Note, best estimate is fine. (Converted into CAD) (Numeric input)  
Respondents who have visited Canada (n=405).

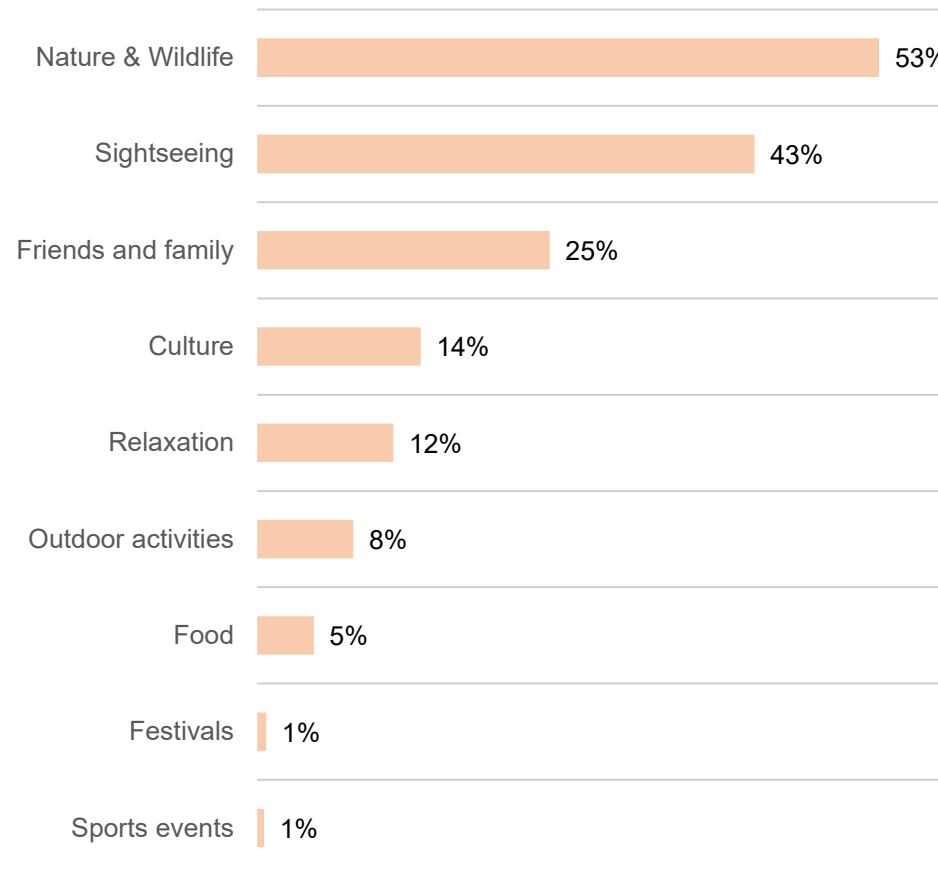
# REASONS FOR CHOOSING ATLANTIC CANADA (OPEN-ENDED)

Nature and wildlife are the leading draw for German visitors to Atlantic Canada, cited by nearly six in ten as a key reason for choosing the region.

Sightseeing also ranks highly, reflecting strong interest in the region's coastal landscapes and scenic routes, while culture and the opportunity to visit or travel with friends and family are secondary but still meaningful motivators.

Among those who have visited Newfoundland & Labrador, nature and wildlife stand out even more strongly as a motivator, reinforcing the province's positioning around distinctive landscapes and outdoor experiences.

### Key Motivators for Visiting Atlantic Canada



“ I decided to visit Atlantic Canada because I was immediately drawn to the region with its mix of nature, tranquility, and authentic culture. The provinces seem less crowded than other parts of Canada, and that's what makes them attractive to me. ”

“ I chose Atlantic Canada because I wanted to see the beautiful natural landscape and coastal regions and experience Canadian culture and history up close. I also wanted to explore remote and less touristy places. ”

T6. Why did you choose to visit Atlantic Canada (i.e., the provinces of New Brunswick, Newfoundland and Labrador, Nova Scotia or Prince Edward Island)? (Open-ended)

Respondent who have visited Atlantic Canada (n=127).

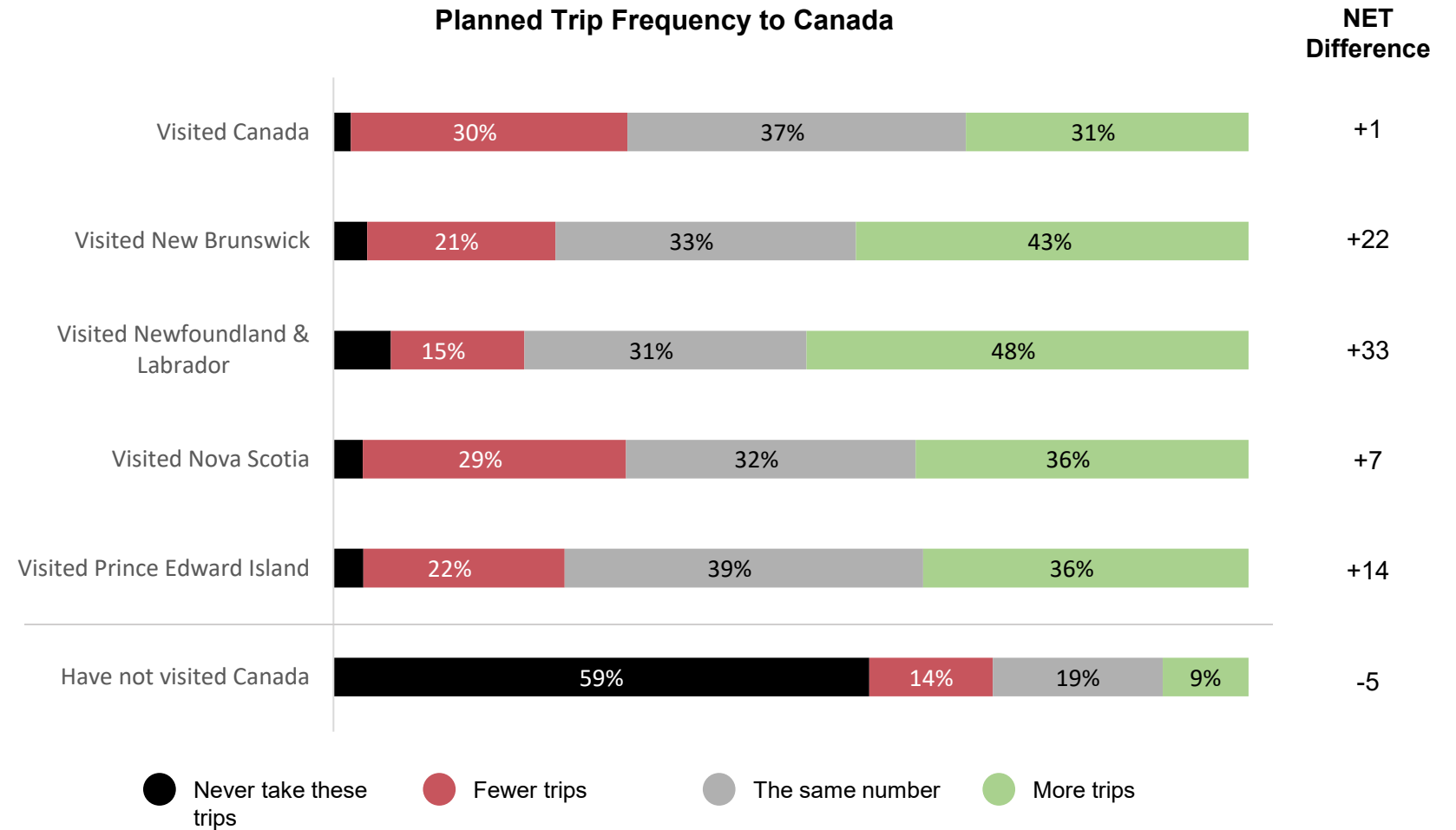
# FUTURE TRAVEL PLANS TO CANADA

Almost four in ten travellers who have previously visited Canada are considering taking the same number of trips to Canada in the future. They are also equally likely to report that they will take either more or fewer trips.

Notably, travellers who have previously visited the Atlantic provinces are more likely to report intentions to return and take additional trips to Canada, suggesting that positive travel experiences in the region may encourage repeat visitation.

In contrast, six in ten German travellers who have not previously visited Canada do not expect to take a trip to Canada.

Younger individuals (25–34) are significantly more likely to plan more trips to Canada than other age groups this year.



Note: NET Difference = More trips – Fewer trips

T8. For each of the following types of travel, are you considering taking more trips, the same number of trips, or fewer trips this year compared to last year (Trips to Canada) (Single-select). All respondents (n=1,012).

## AWARENESS & PERCEPTIONS OF CANADA

Awareness of Atlantic Canada among German travellers varies across the region and is strongly influenced by prior experience with Canada. Awareness levels are broadly similar across the four Atlantic provinces, with Newfoundland & Labrador and Nova Scotia only slightly ahead of New Brunswick and Prince Edward Island.

German travellers who have already visited Canada are far more engaged in planning future trips, with nearly half actively planning another visit. By comparison, much of those who have not visited Canada before remains at an earlier inspirational stage, with many dreaming about or considering a trip but not yet making concrete plans.

Knowledge of things to do and see in Atlantic Canada also varies substantially by travel experience. Among previous visitors to Canada, roughly two-thirds report being familiar while this familiarity declines to roughly one-third for those who have never been to Canada.

Perceptions of the Atlantic Canada provinces are highly positive among those who know the region. Across all four provinces, around eight in ten familiar travellers rate them as appealing destinations, with Nova Scotia and Newfoundland & Labrador leading and the other provinces also performing strongly among both previous visitors to Canada and those who have not yet visited.



📍 Greenwich Beach, PEI

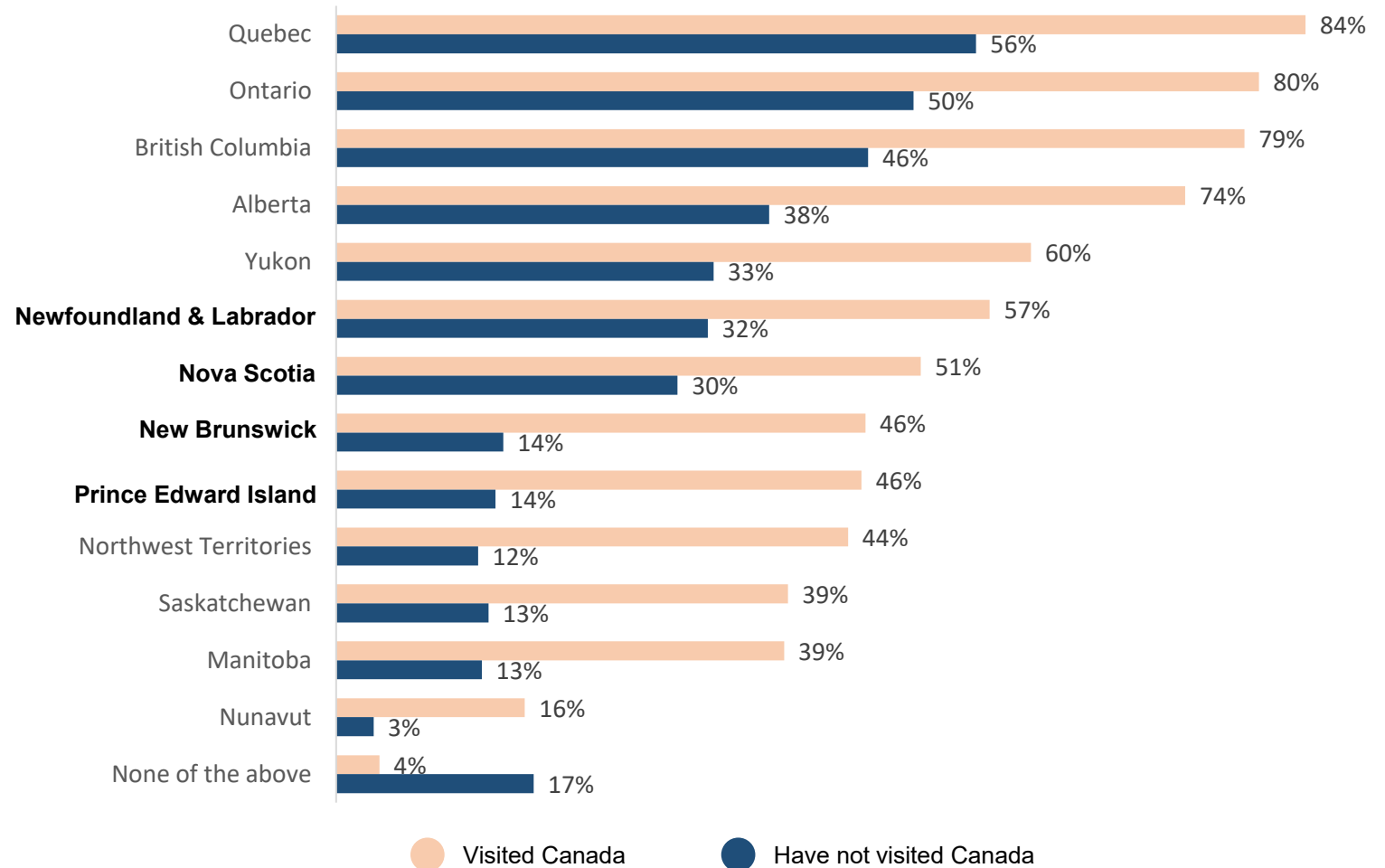
# AWARENESS OF CANADIAN PROVINCES & TERRITORIES

Awareness of Canadian provinces is highest for major destinations such as Quebec, Ontario, British Columbia, and Alberta. Yukon also stands out with relatively strong recognition among German travellers.

Atlantic provinces fall in the mid-range of awareness among German travellers, with relatively similar recognition across the four provinces. Awareness is consistently higher among those who have previously visited Canada.

Awareness varies by profile: those aware of Newfoundland & Labrador are more likely to be higher-income, older male Outdoor Explorers; awareness of Nova Scotia skews higher-income Purpose-Driven Families; New Brunswick awareness skews younger adults; and Prince Edward Island awareness skews Outdoor Explorers.

Awareness of Canadian Provinces & Territories



A1. Thinking specifically of Canada, prior to this survey, which of the following provinces / territories in Canada, if any, have you ever heard of? (Multi-select)  
All respondents (Rebased) (n=1,012).

# CANADA TRIP INTENTION

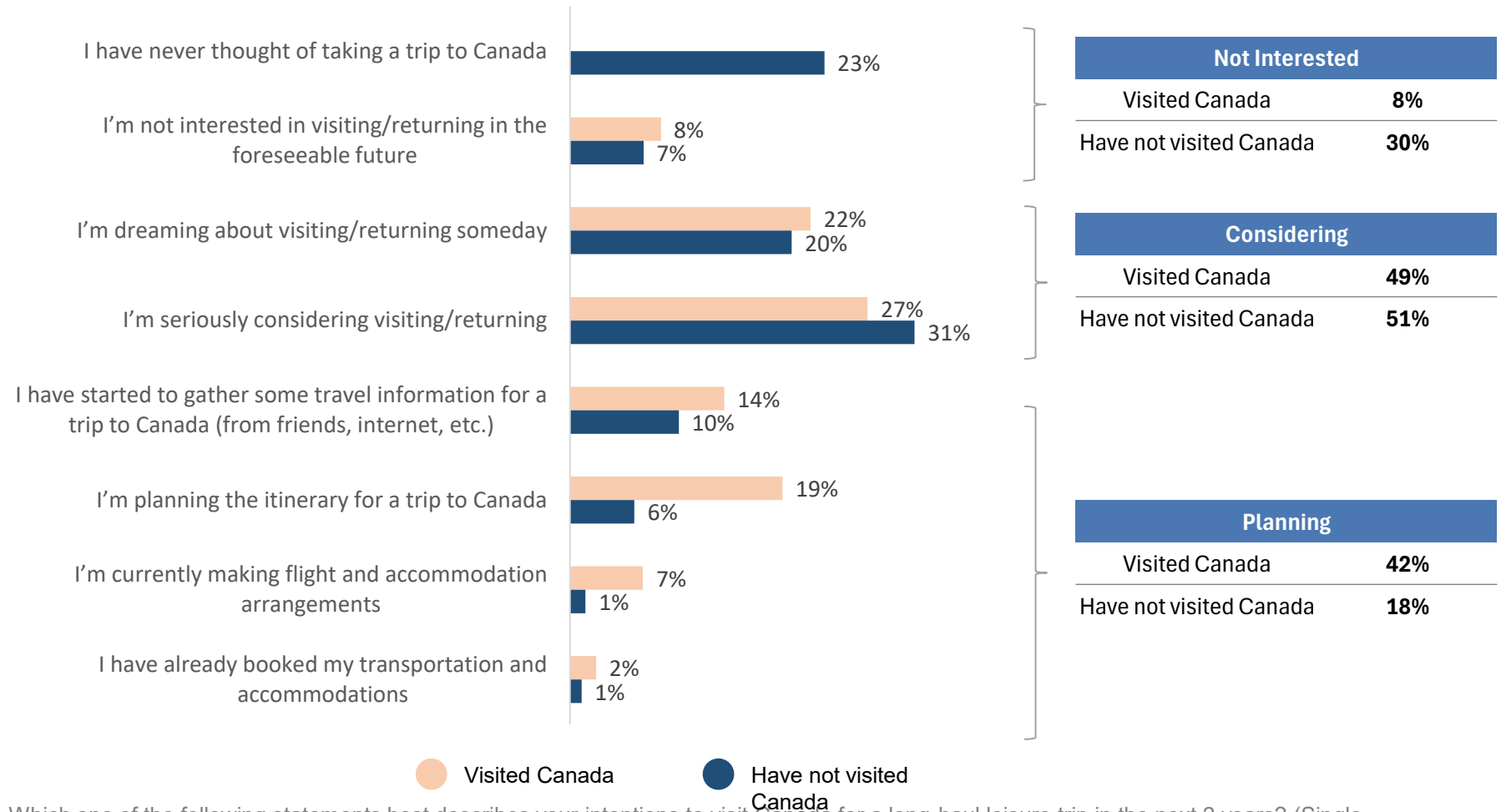
**German travellers who have already visited Canada are far more engaged in trip planning, with nearly half in an active planning stage versus less than one-fifth of those who have not visited Canada before.**

Among those who have not visited Canada, a sizeable group remains at the inspirational stage, with many dreaming about a trip or seriously considering one but not yet planning.

One-quarter of those who have not visited Canada have never thought about taking a leisure trip to Canada. This is more common for individuals with lower income levels.

Travellers in the planning stage are more likely to be Purpose-Driven Families, while those in the considering stage tend to be Outdoor Explorers.

## Travel Intent to Canada



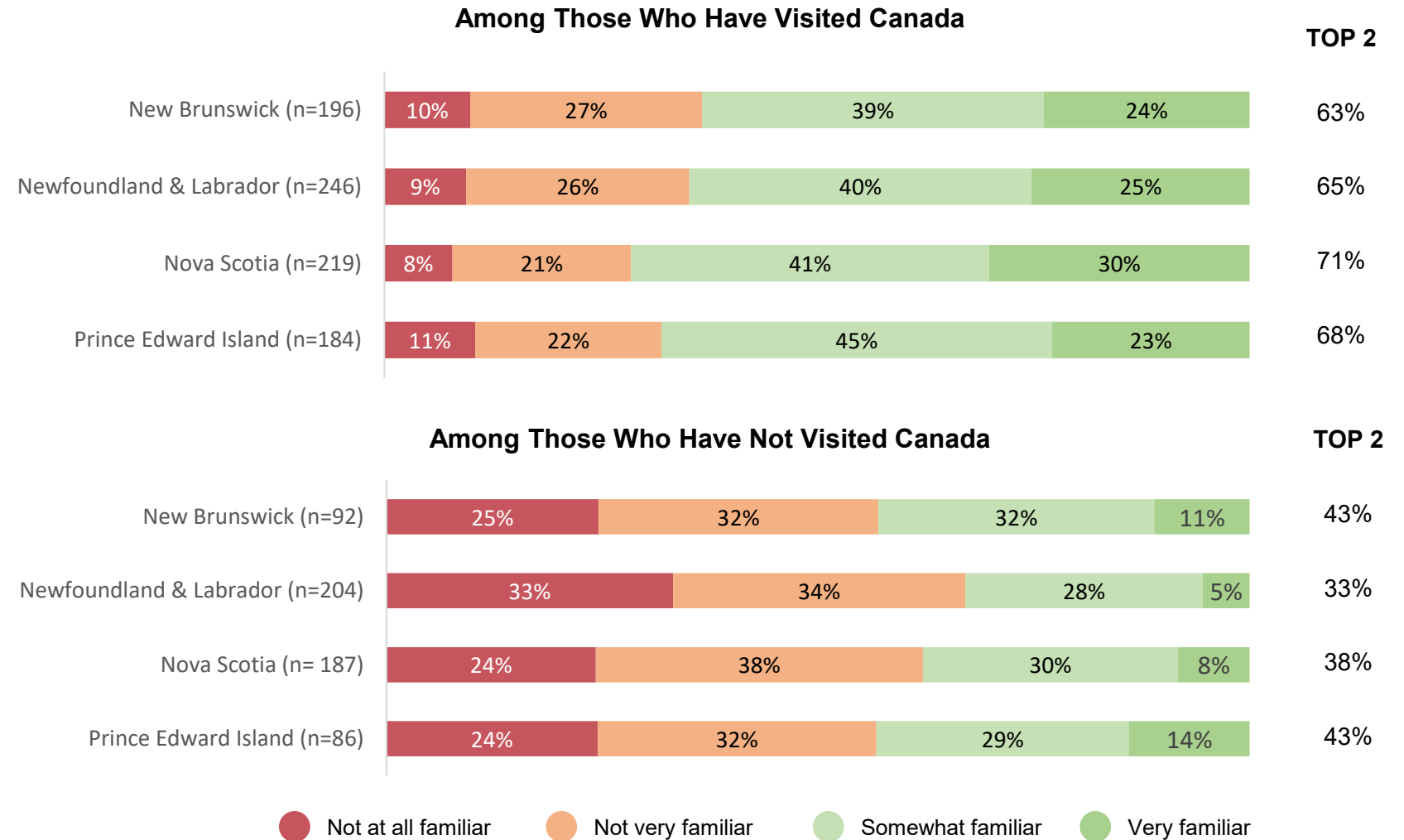
A2. Which one of the following statements best describes your intentions to visit Canada for a long-haul leisure trip in the next 2 years? (Single select)  
All respondents (n=1,012).

# KNOWLEDGE OF WHAT TO SEE AND DO IN ATLANTIC CANADA

**Familiarity with things to see and do across Atlantic Canada is substantially higher among travellers who have previously visited Canada, with roughly two-thirds reporting familiarity with each province.**

Nova Scotia is the most familiar province for this group, while Newfoundland & Labrador, Prince Edward Island, and New Brunswick also achieve solid familiarity levels that are quite close to one another. Younger individuals (25-34) are more likely to be familiar with things to do and see in Atlantic Canadian provinces.

Among those who have not visited Canada, familiarity drops markedly, with only around one in three feeling they know what there is to see and do in most provinces.



A3. How familiar are you with what there is to see and do in each of the following Atlantic Canadian provinces while on vacation (4-point scale) Respondents who have heard of the Atlantic Canada provinces or visited them before.

# ATLANTIC CANADA'S APPEAL

Among those familiar with the region, appeal is uniformly high across all four Atlantic provinces, with around eight in ten rating each as an appealing destination.

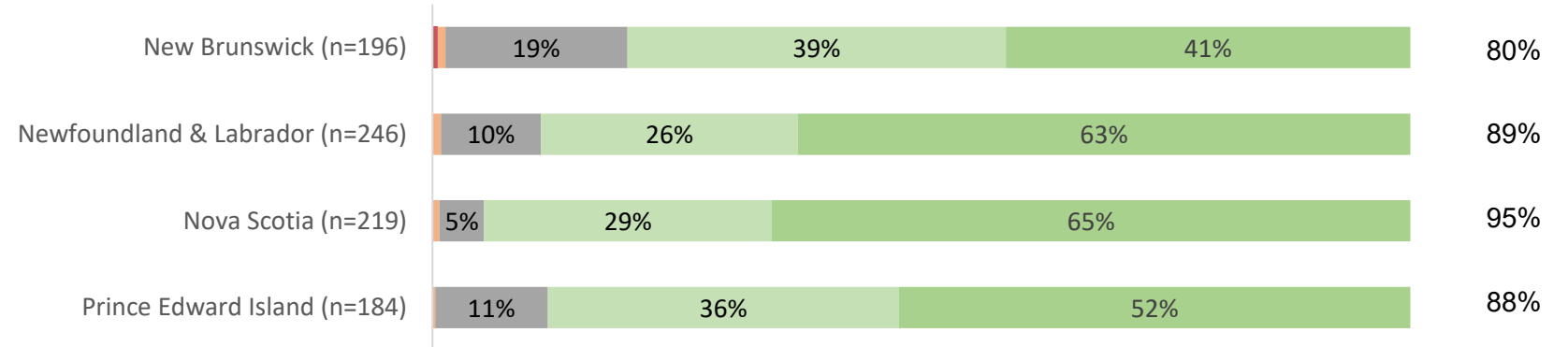
Among those who have visited Canada before, Nova Scotia leads with the highest appeal, followed closely by Newfoundland & Labrador, Prince Edward Island, and New Brunswick.

Among those who have not visited Canada, appeal is somewhat lower but still solid across all provinces. Nova Scotia and New Brunswick show stronger appeal to this group.

Those who find New Brunswick appealing tend to be Purpose-Driven Families, while Simplicity Lovers are the least likely to find Newfoundland & Labrador or Prince Edward Island appealing.

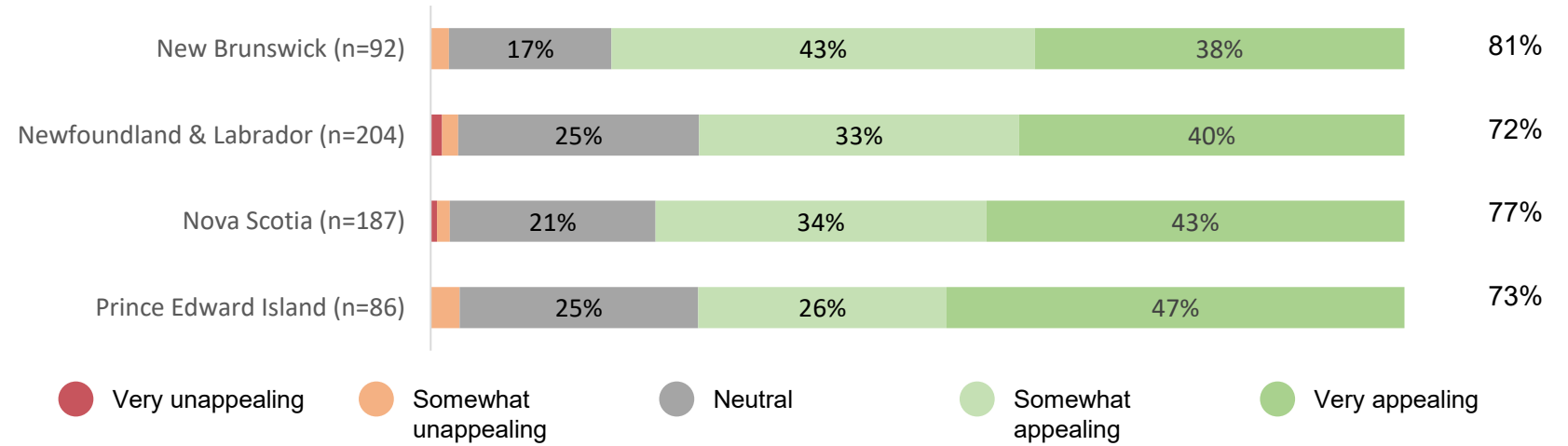
## Among Those Who Have Visited Canada

TOP 2



## Among Those Who Have Not Visited Canada

TOP 2



A4. Overall, how would you rate each of the following Atlantic Canadian provinces as a travel destination? (5-point scale)  
 Respondents who have heard of the Atlantic Canada provinces or visited them before.

## INTEREST IN VISITING ATLANTIC CANADA

Consideration levels to visit Atlantic Canada are strongest among German travellers who have previously visited Canada, reinforcing the importance of past visitation in shaping future travel intentions. Interest in Nova Scotia and Newfoundland & Labrador is the highest.

While consideration levels are lower among those who have not visited Canada before, the overall pattern remains consistent, with these two provinces leading interest. Younger travellers, particularly those aged 25–44, show a greater likelihood of considering travel to the region than older segments.

Atlantic Canada's stand-alone appeal is strongest among recent Canada visitors and travellers already familiar with its provinces. However, this positive perception does not translate into exclusive visitation, as stand-alone appeal remains equally high among those planning to visit only the region and those combining it with the rest of Canada.

When envisioning a trip to Atlantic Canada, most travellers see the region as a multi-province experience. Roughly three-quarters indicate they would visit more than one province.

For those who have previously visited Canada, driving is the preferred way to travel between provinces, reflecting a desire for flexibility and exploration. Among those who have not visited Canada before, both flying and driving are seen as viable options.

The diversity of landscapes and scenery is the strongest driver for visiting multiple provinces, alongside the opportunity to experience different communities and cultures and the ease of travelling within the region.



♀ Cable John Cove, NL

# ATLANTIC CANADA TRAVEL CONSIDERATION

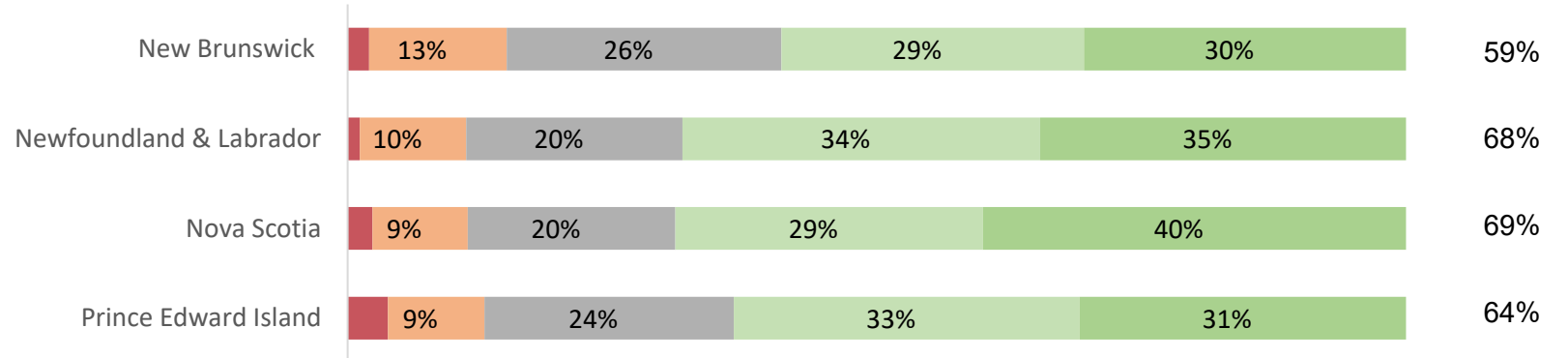
German travellers who have previously visited Canada are more likely to consider visiting Atlantic Canada, with Newfoundland & Labrador and Nova Scotia being the most frequently considered provinces, each reported by more than two-thirds of travellers.

Consideration levels decline for those who have not visited Canada, but with a similar pattern. Newfoundland & Labrador and Nova Scotia rank as the most considered provinces, followed by New Brunswick and then Prince Edward Island.

Younger individuals (25-34, 35-44) are more likely to consider visiting Atlantic Canadian destinations than other age groups.

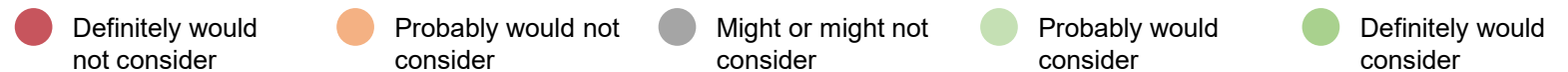
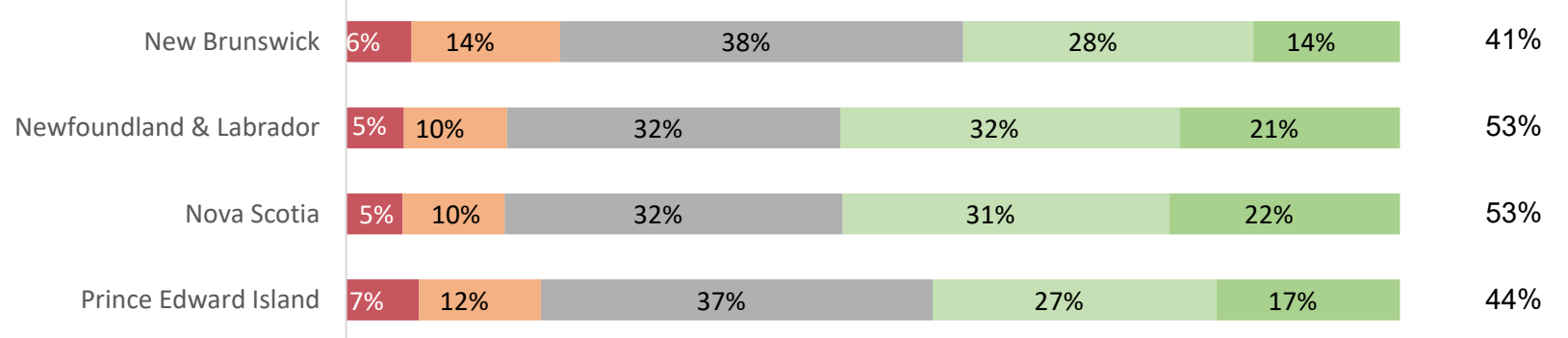
## Consideration – For Those Who Have Been to Canada

TOP 2



## Consideration – For Those Who Have Not Been to Canada

TOP 2



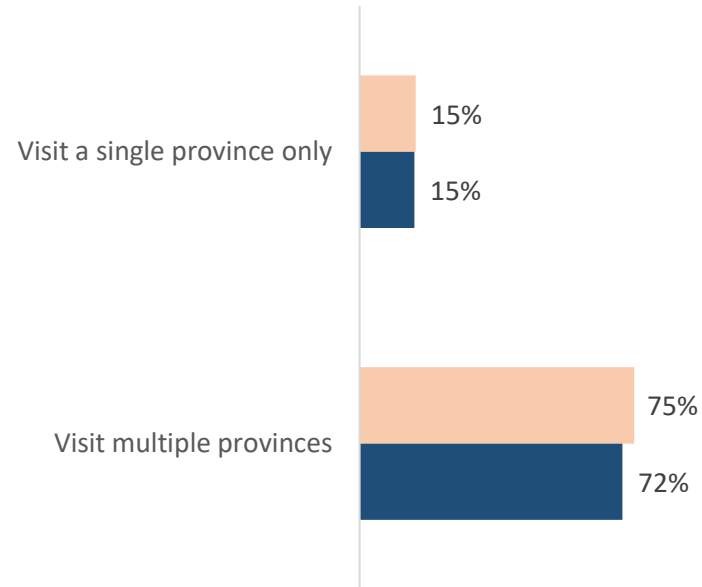
F1. When thinking of your travel plans over the next 2 years, how likely are you to consider each of the following Atlantic Canadian destinations as part of a long-haul leisure trip to Canada? (5-point scale)  
 Respondents who are considering and planning a trip to Canada (n=796).

# PLANNED ITINERARIES ACROSS ATLANTIC CANADA

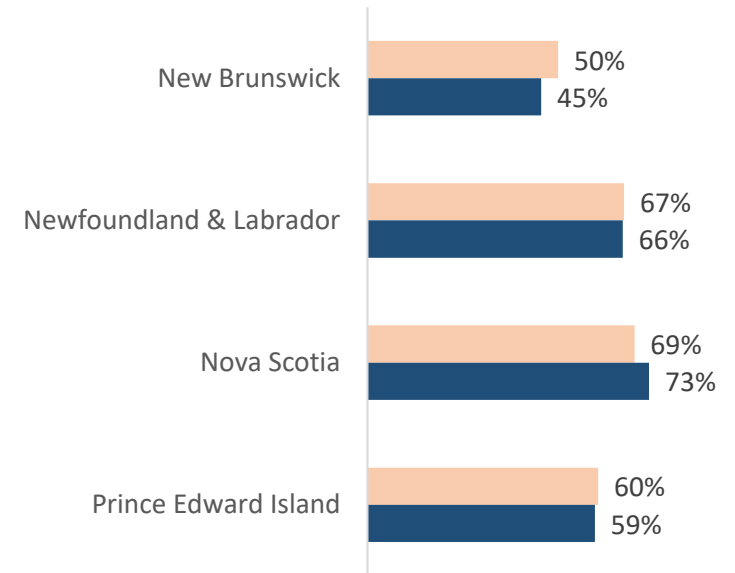
**Around three-quarters of German travellers report they would visit multiple provinces when planning a trip to Atlantic Canada, with this pattern holding consistent across both those who have visited Canada before and those who have not.**

Newfoundland & Labrador and Nova Scotia are most frequently identified as the provinces they would include in their itinerary, followed closely by Prince Edward Island and New Brunswick, with similarly strong interest from both traveller segments.

### Atlantic Canada Trip Composition



### Atlantic Canada Provinces to Visit



● Visited Canada      ● Have not visited Canada

F3. If planning a trip to Atlantic Canada, would you visit a single province in the region or visit multiple provinces in Atlantic Canada? (Single-select)  
 Respondents who are considering travelling to more than one Atlantic Canadian province (n=515).  
 F3B. Which Atlantic Canada provinces would you plan to visit on this trip? (Multi-select)  
 Respondents who would visit multiple provinces (n=381).

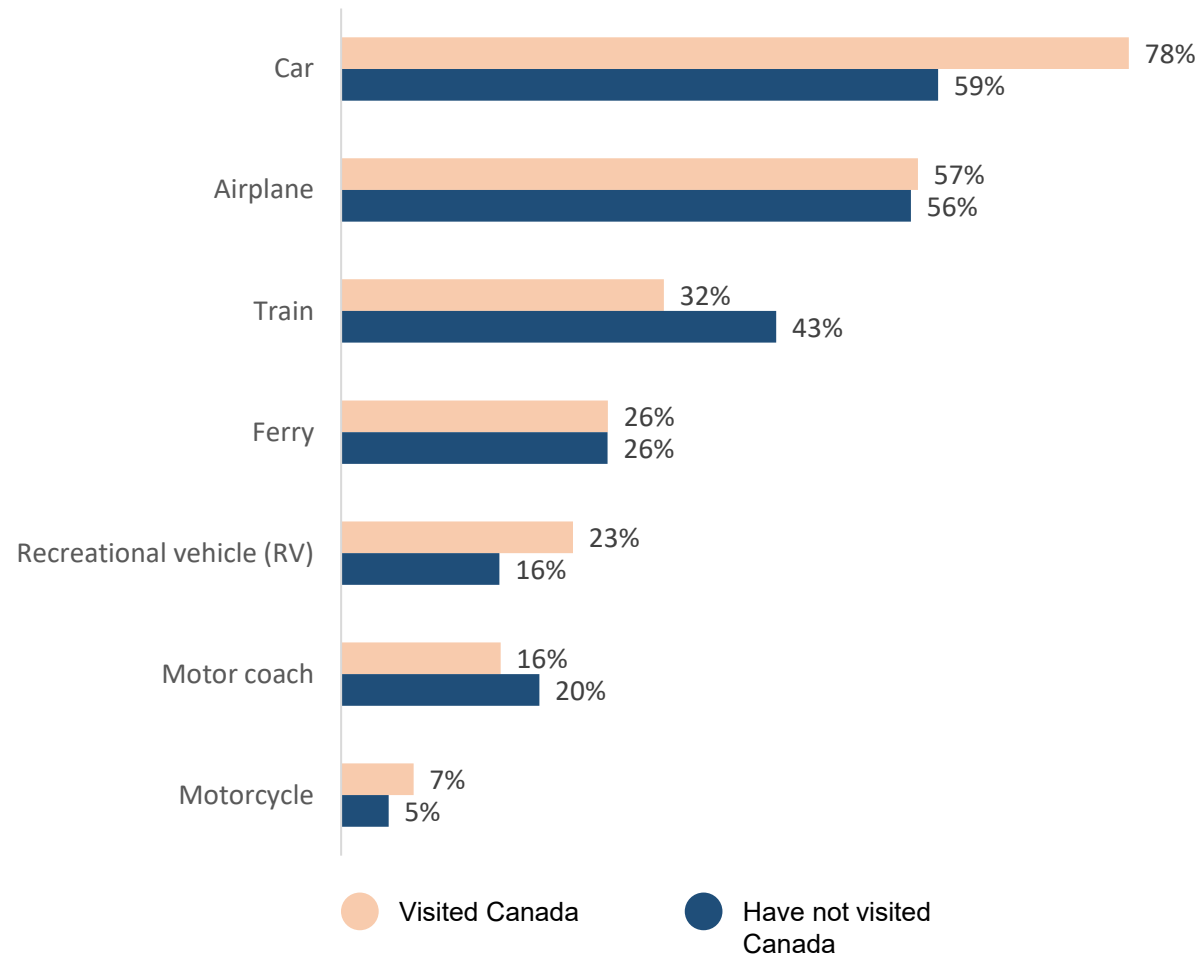
**Three-quarters of German travellers who have previously visited Canada report that driving would be their main mode of transportation between provinces.**

Among the general travel population, both flying and driving are similarly considered, with more than half indicating they would use either option to travel between provinces.

Travellers who have been to Canada before are less likely to cite the train as a main transportation method between provinces.

Travellers who plan to fly between provinces are more likely to consider visiting Prince Edward Island, while those planning to travel by RV are more likely to be travelling with children.

### Main Transportation to Travel Between Provinces



F4. What mode(s) of transportation would you use to travel between provinces in Atlantic Canada? (Multi-select)  
 Respondents who would visit multiple provinces (n=379).

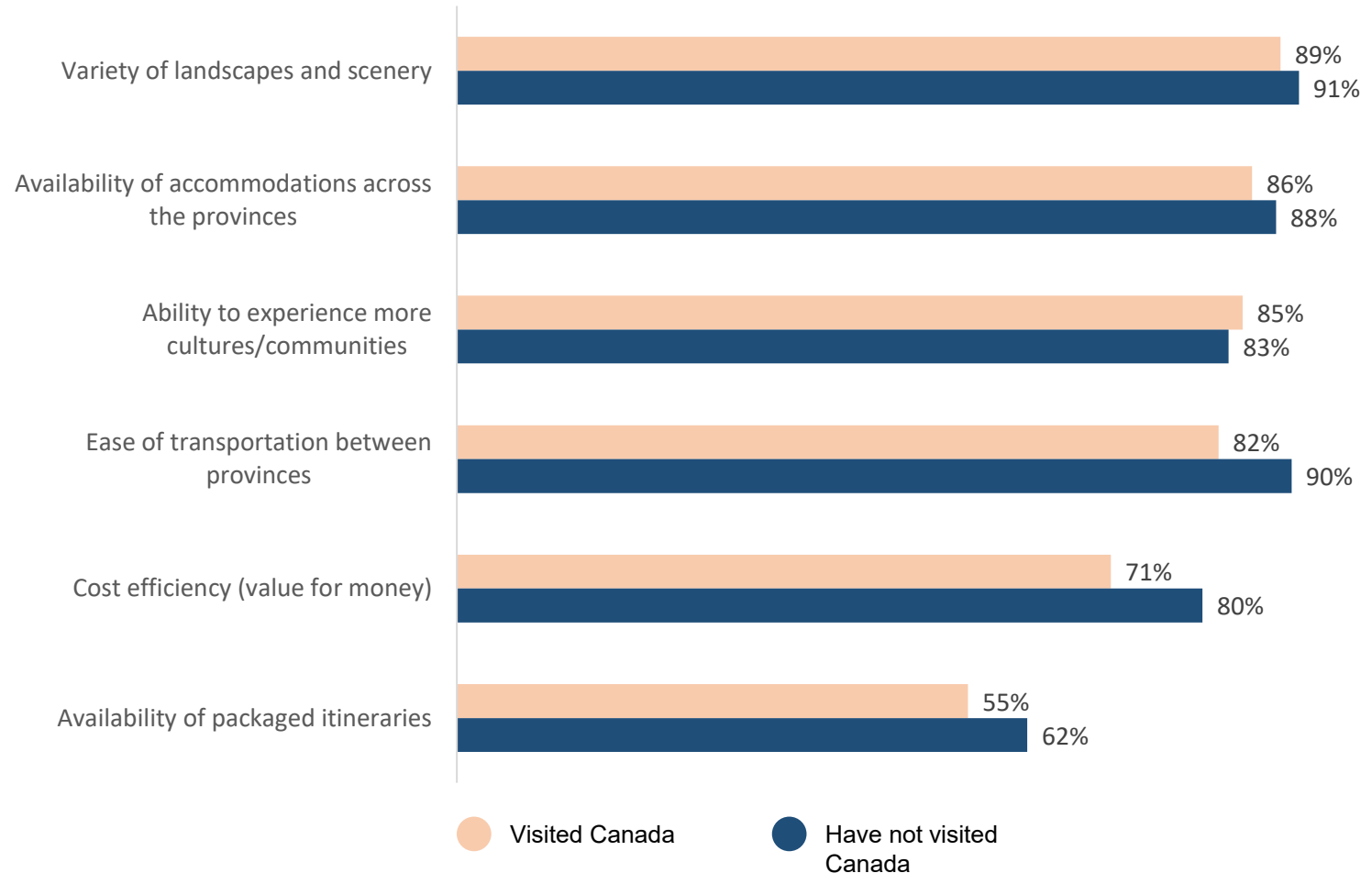
# FACTORS INFLUENCING MULTI-PROVINCE TRAVEL

The variety of landscapes and scenery is the strongest motivator for visiting multiple provinces in Atlantic Canada, cited as important by nine in ten travellers across both those who have visited Canada and those who have not.

Availability of accommodations, ease of getting between provinces, and the chance to experience different local cultures and communities are also highly influential. Those who have not visited Canada place particularly high importance on ease of transportation, with nine in ten citing it as a key factor.

Cost efficiency is a key motivator for eight in ten travellers who have not visited Canada and seven in ten among previous Canada visitors. The availability of packaged itineraries plays a more secondary role.

Factors Influencing Travel Across Multiple Provinces (TOP2 % Important)



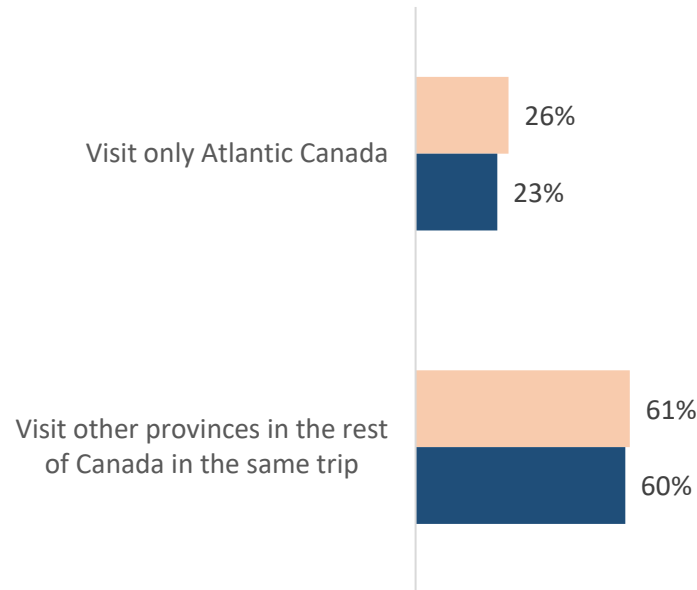
F4B. How important is each of the following factors in influencing your decision to visit multiple provinces in Atlantic Canada on one trip? (5=point scale)

Respondents who would visit multiple provinces (n=381).

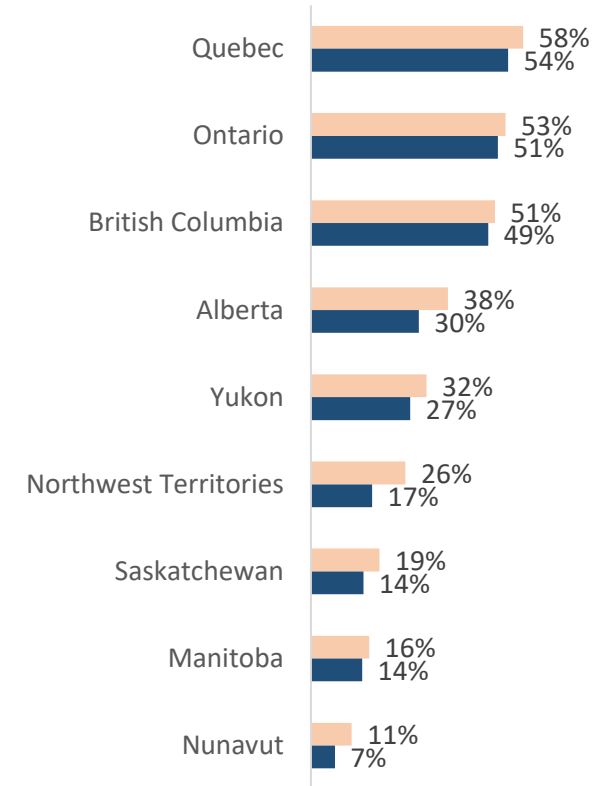
Many travellers see Atlantic Canada as part of a broader Canada itinerary: six in ten would combine it with other provinces, while only about two in ten plan to focus solely on Atlantic Canada. This pattern is consistent among those who have and have not visited Canada before.

Among those interested in visiting multiple provinces, Quebec, Ontario, and British Columbia emerge as the leading add-on destinations.

## Visiting Atlantic Canada Alone or with Other Provinces



## Canadian Provinces Under Consideration



● Visited Canada      ● Have not visited Canada

F5. If planning a trip to Atlantic Canada, would you visit only Atlantic Canada or visit other provinces in the rest of Canada during the same trip? (Single-select)

Respondents who are interested in travelling to at least one Atlantic Canadian province (n=614).

F6. Which other Canadian provinces/territories would you consider visiting as part of a trip to Atlantic Canada? (Multi-select)

Respondents who are interested in visiting other provinces in Canada (n=370).

# STAND-ALONE DESTINATION

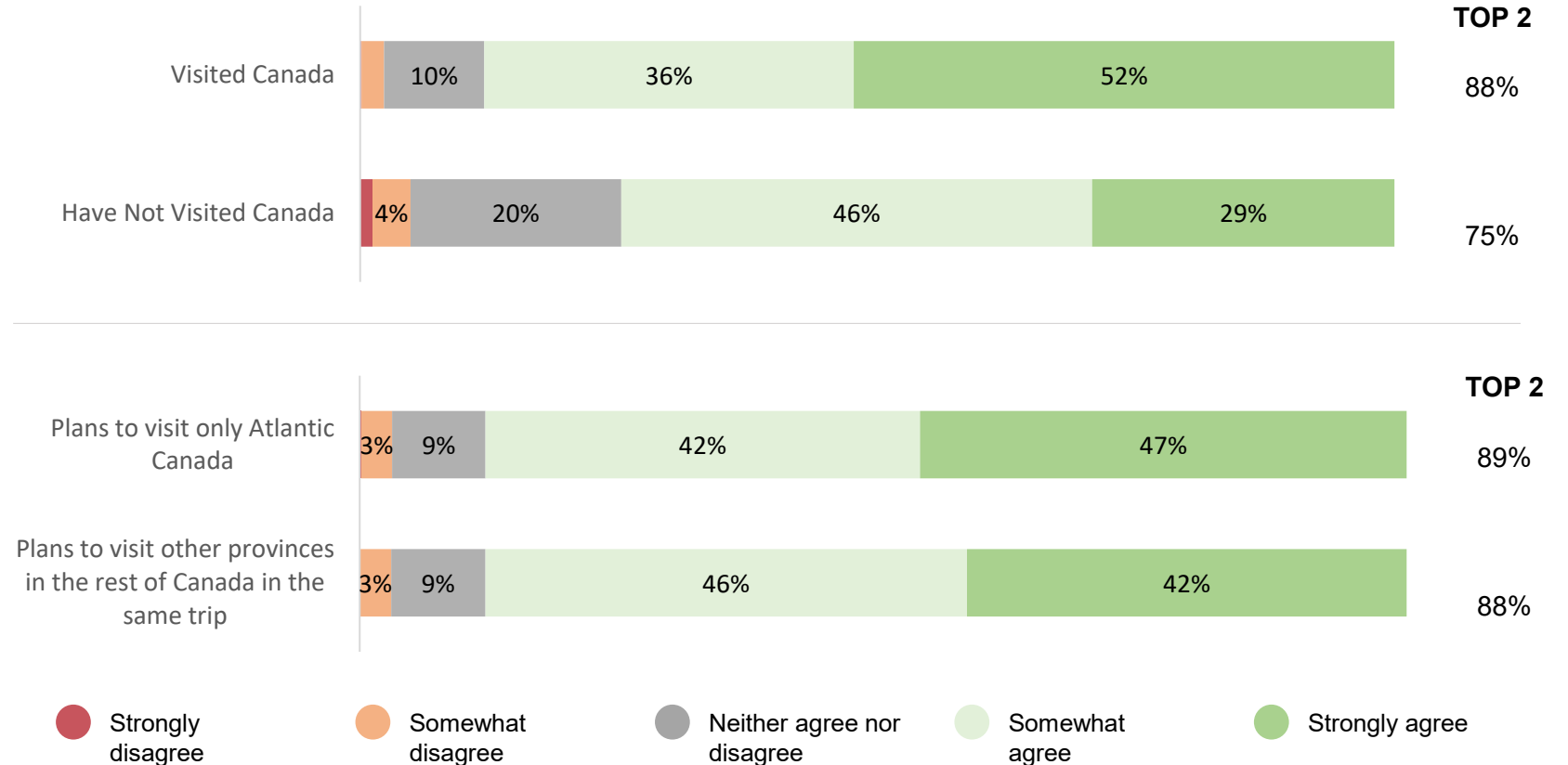
**Prior visitation to Canada drives Atlantic Canada's stand-alone appeal, with nearly nine in ten past visitors viewing the region this way versus three-quarters of non-visitors. However, this appeal does not necessarily translate into exclusive travel to the region.**

Appeal is significantly higher among those who visited Canada recently (past five years) compared to those who travelled longer ago or have never visited.

Awareness also drives appeal, with travellers familiar with at least one Atlantic province significantly more likely to view it as a stand-alone destination.

Stand-alone appeal is equally high among travellers planning to visit only Atlantic Canada and those planning a broader multi-province trip, indicating that positive perceptions do not limit interest in pairing it with the rest of Canada.

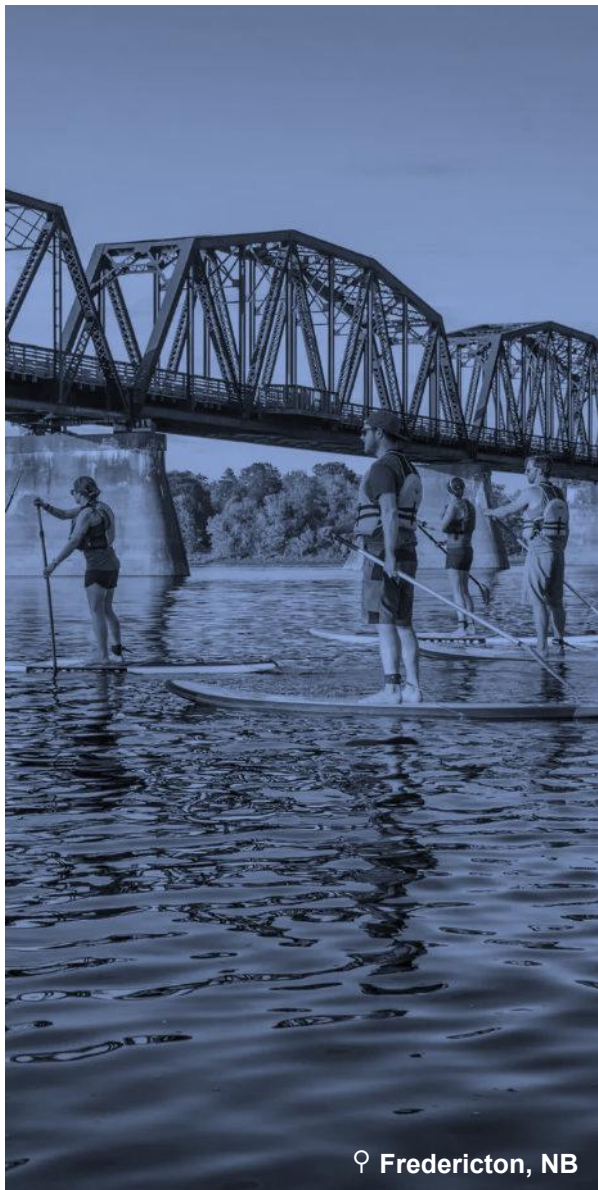
## Atlantic Canada as a Stand-Alone Destination



G1B. Thinking specifically about Atlantic Canada as a travel destination, how much do you agree or disagree with the following statement. [Atlantic Canada is appealing enough to visit as a stand-alone destination]. (5-point-scale)  
All respondents (n=1,012).

F5. If planning a trip to Atlantic Canada, would you visit only Atlantic Canada or visit other provinces in the rest of Canada during the same trip? (Single-select)

Respondents who are interested in travelling to at least one Atlantic Canadian province (n=614).



♀ Fredericton, NB

## MOTIVATORS & BARRIERS

German travellers are primarily drawn to Atlantic Canada for its nature-based experiences, with sightseeing, exploring unique places, visiting parks, hiking, and wildlife viewing consistently ranking as the strongest motivators across all provinces. Nature and wildlife stand out as the region's defining appeal, supported by secondary strengths such as culture, welcoming communities, and outdoor adventure experiences. Additional experiences, such as seeing the world's highest tides, discovering local culinary offerings, wellness activities, and visiting historical sites or galleries, serve as important secondary motivators that enhance overall interest.

Across provinces, arranging transportation within the destination remains the most critical consideration, followed by factors such as the perception of Atlantic Canada as a welcoming place and the ability to visit multiple provinces. However, limited destination awareness remains the biggest barrier, with nearly half of German travellers citing a lack of knowledge about Atlantic Canada. Cost concerns, lower perceived appeal, and travel distance also present moderate barriers, while factors such as climate, remoteness, or limited attractions play a relatively minor role in shaping travel decisions.

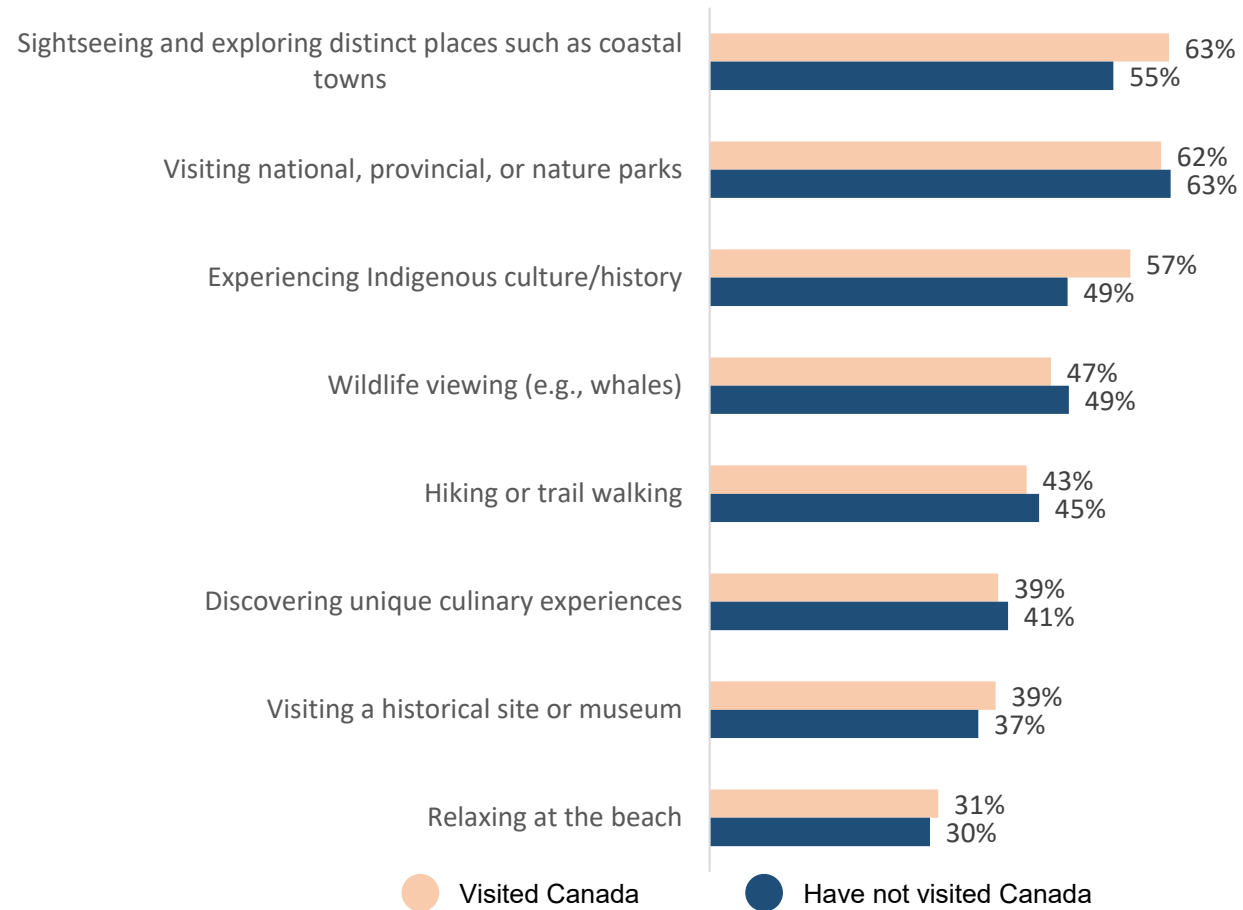
# FACTORS INFLUENCING VISITING NEW BRUNSWICK

**Sightseeing and nature-based experiences are the primary drivers influencing German travellers to visit New Brunswick across both groups.**

Visiting parks and exploring distinct places such as coastal towns rank as the strongest motivators, particularly among Outdoor Explorers and Purpose-Driven Families. These are followed by experiencing Indigenous culture and wildlife viewing. Hiking and trail walking also play an important role, especially for Outdoor Explorers.

Additional experiences act as supporting motivators for travel to New Brunswick. These include discovering unique culinary experiences, visiting historical sites or museums, and seeing the world's highest tides. Visiting historical sites is particularly appealing to Purpose-Driven Families, but less so for Refined Globetrotters.

## Primary Reasons to Visit



C1. If you were travelling to Atlantic Canada (i.e., the provinces of New Brunswick, Newfoundland and Labrador, Nova Scotia or Prince Edward Island), to what extent would each of the following considerations impact your decision to visit? (3-point scale)  
 Respondents considering visiting New Brunswick (n=395).

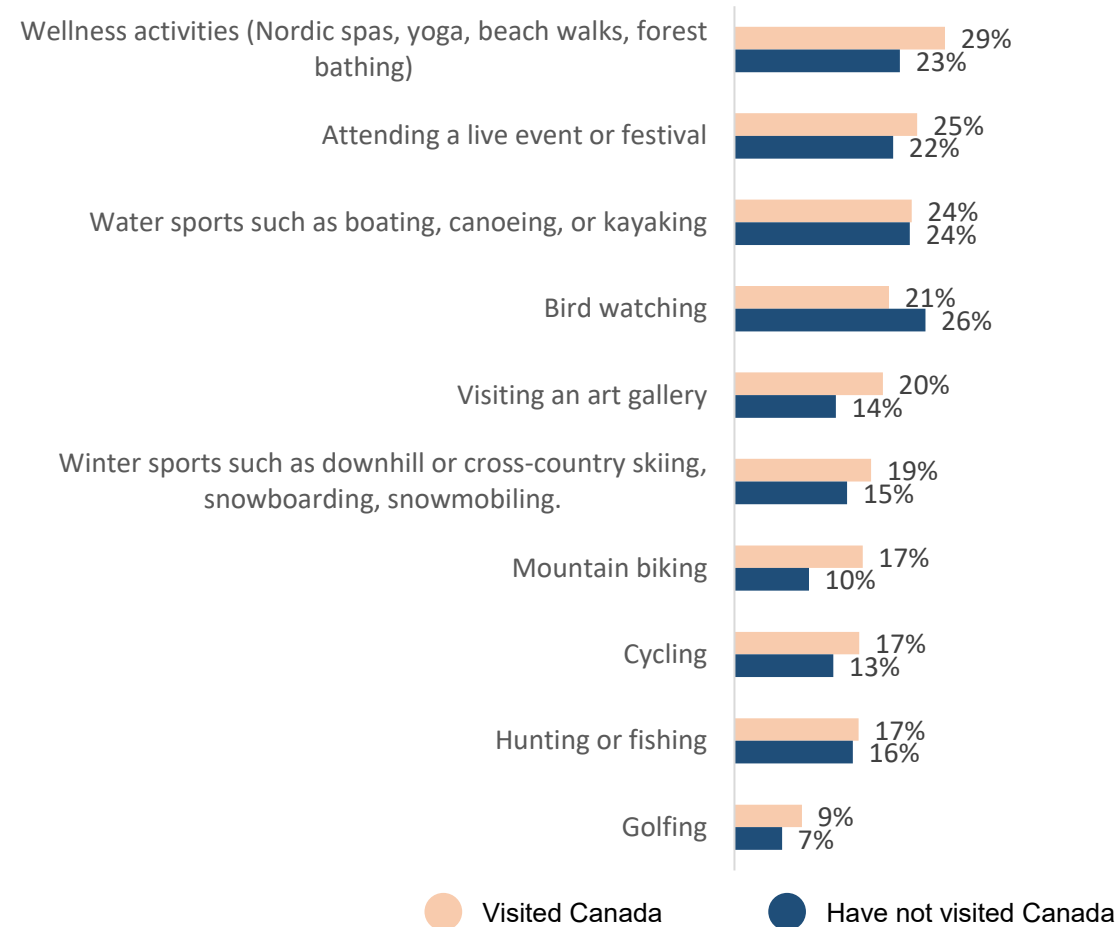
# FACTORS INFLUENCING VISITING NEW BRUNSWICK – CONTINUED

Several outdoor and recreational activities are not strong travel motivators for German travellers considering New Brunswick, particularly among certain segments. Golf stands out as the least influential, especially among Outdoor Explorers.

Activities such as hunting or fishing, winter sports, cycling, and mountain biking also show more limited influence overall. However, some activities resonate more strongly with Purpose-Driven Families, including cycling and mountain biking, as well as bird watching.

Experiences such as water sports, wellness activities, festivals, and art galleries tend to function more as secondary considerations rather than key drivers. Visiting art galleries is notably less motivating for Outdoor Explorers.

## Primary Reasons to Visit



C1. If you were travelling to Atlantic Canada (i.e., the provinces of New Brunswick, Newfoundland and Labrador, Nova Scotia or Prince Edward Island), to what extent would each of the following considerations impact your decision to visit? (3-point scale)  
 Respondents considering visiting New Brunswick (n=395).

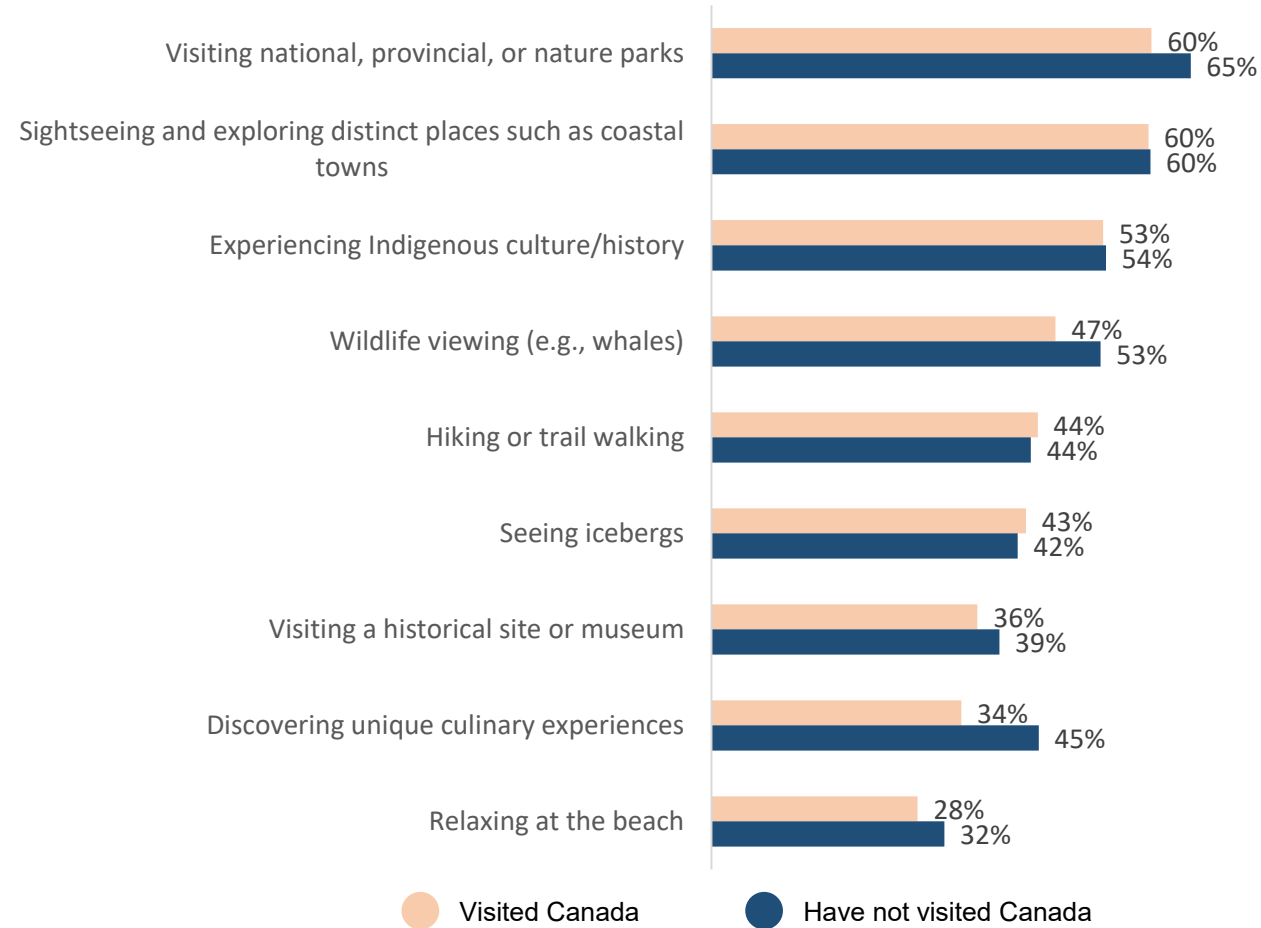
# FACTORS INFLUENCING VISITING NEWFOUNDLAND & LABRADOR

**Nature-based experiences are the primary drivers influencing German travellers to visit Newfoundland & Labrador across both markets.**

Visiting parks and exploring distinct places such as coastal towns are the strongest motivators, particularly among Outdoor Explorers. These are followed by experiencing Indigenous culture and wildlife viewing. Hiking also plays an important role in shaping interest, especially for Outdoor Explorers.

Several additional experiences further contribute to Newfoundland & Labrador's appeal. Seeing icebergs stands out as a unique draw for the province, while discovering culinary experiences and visiting historical sites serve as complementary motivators. Visiting historical sites is particularly appealing to Purpose-Driven Families.

## Primary Reasons to Visit



C1. If you were travelling to Atlantic Canada (i.e., the provinces of New Brunswick, Newfoundland and Labrador, Nova Scotia or Prince Edward Island), to what extent would each of the following considerations impact your decision to visit? (3-point scale)  
 Respondents considering visiting Newfoundland & Labrador (n=480).

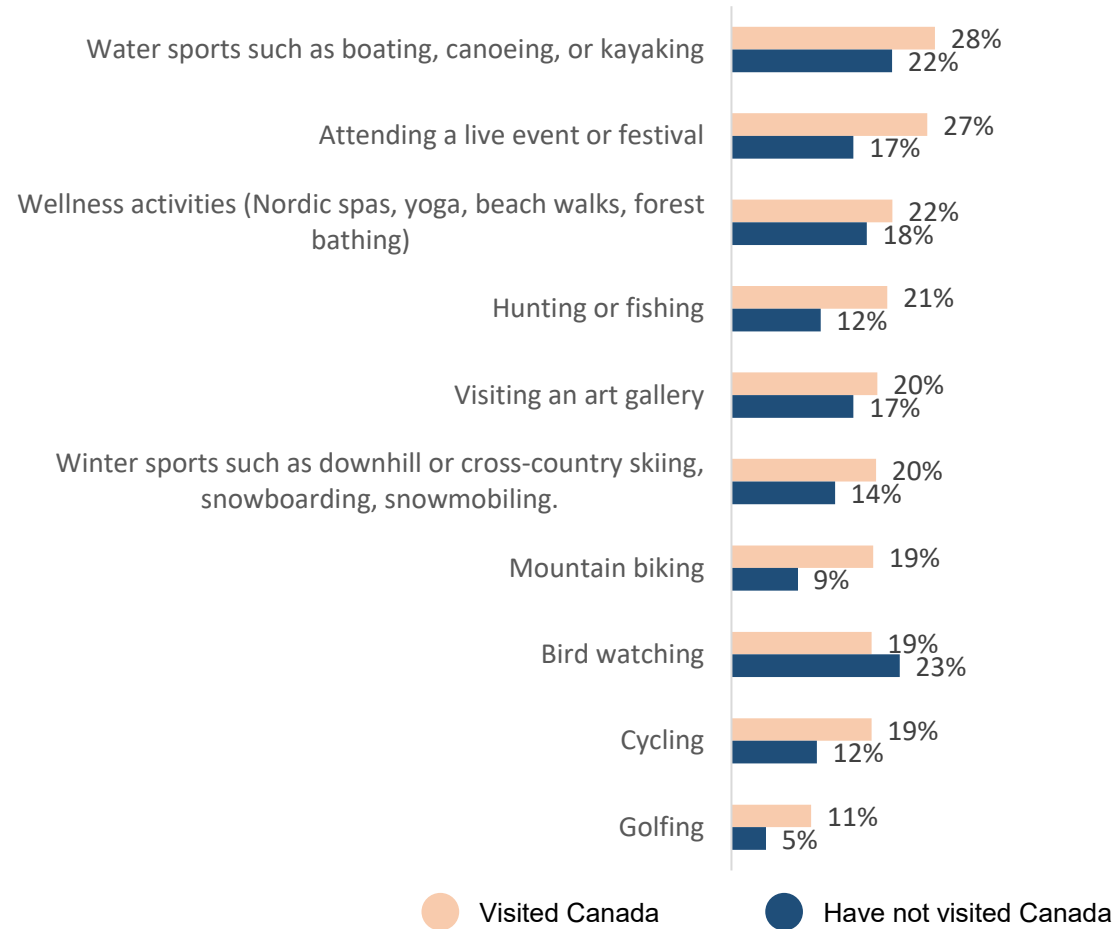
**Activities such as wellness experiences, culinary exploration, water sports, bird watching, and attending festivals are commonly cited as supporting reasons for visiting the province.**

Attending live events or festivals is more motivating for Culture Seekers, but less so for Outdoor Explorers and Refined Globetrotters. Visiting art galleries also plays a complementary role, though it is less motivating for both groups.

Outdoor recreation shows mixed appeal across segments. Cycling resonates more with Purpose-Driven Families, while mountain biking is less motivating for Refined Globetrotters.

Certain niche activities show limited appeal overall. Golfing, in particular, is not a strong motivator, especially among Outdoor Explorers.

## Primary Reasons to Visit



C1. If you were travelling to Atlantic Canada (i.e., the provinces of New Brunswick, Newfoundland and Labrador, Nova Scotia or Prince Edward Island), to what extent would each of the following considerations impact your decision to visit? (3-point scale)  
 Respondents considering visiting Newfoundland & Labrador (n=480).

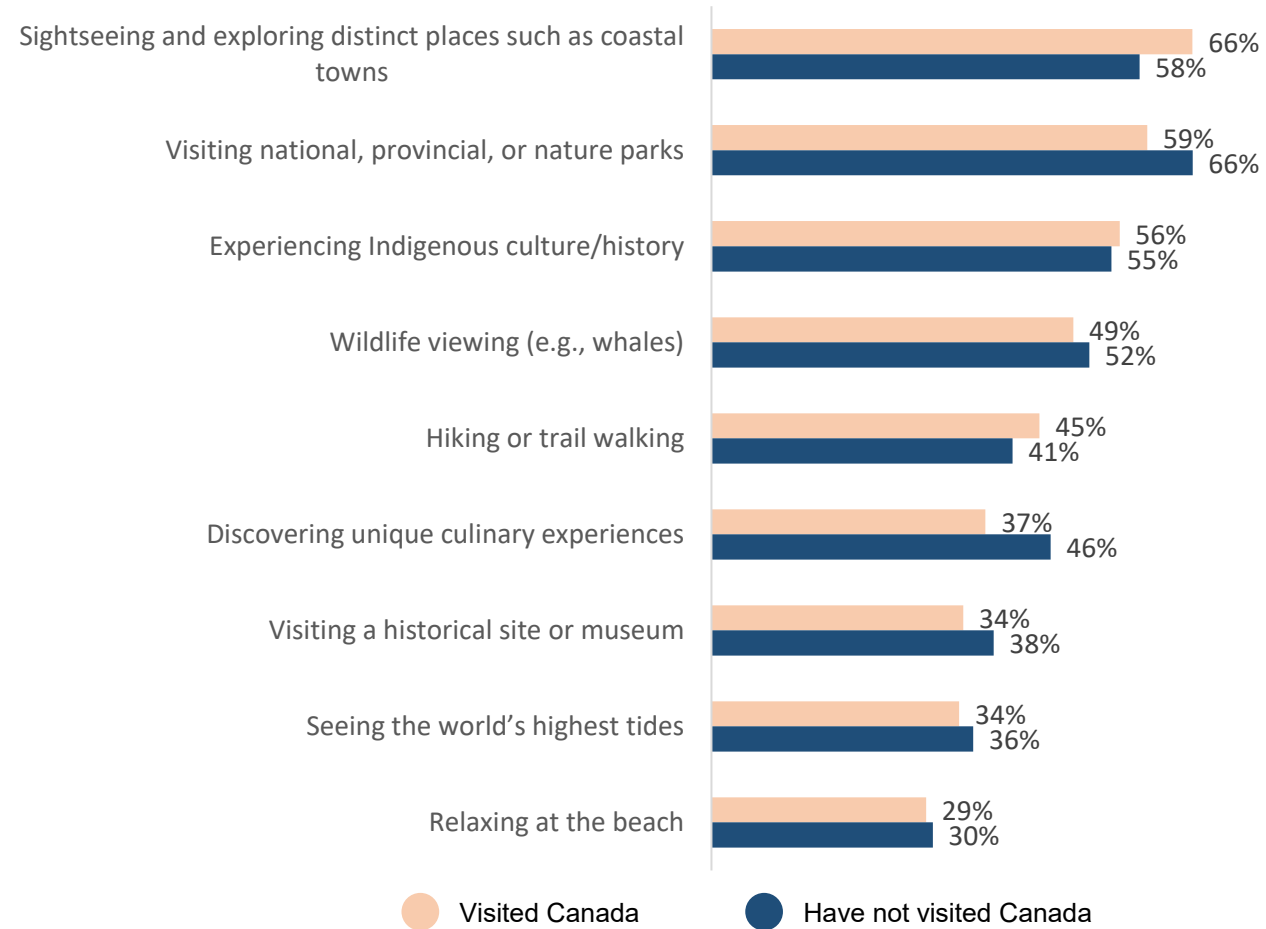
# FACTORS INFLUENCING VISITING NOVA SCOTIA

**Sightseeing and exploring distinct places such as coastal towns is the leading reason influencing German travellers to visit Nova Scotia, with nearly two-thirds identifying it as a main motivator.**

Visiting national, provincial, or nature parks is cited at a similarly high level, particularly among Outdoor Explorers, followed by experiencing Indigenous culture and history and wildlife viewing. Hiking or trail walking also plays a meaningful role, especially for Outdoor Explorers.

Discovering unique culinary experiences also contributes to interest in the province. Visiting historical sites or museums is more motivating for Purpose-Driven Families, but less so for Refined Globetrotters, while sightseeing overall is also less of a primary driver for this segment.

## Primary Reasons to Visit



C1. If you were travelling to Atlantic Canada (i.e., the provinces of New Brunswick, Newfoundland and Labrador, Nova Scotia or Prince Edward Island), to what extent would each of the following considerations impact your decision to visit? (3-point scale)  
Respondents considering visiting Nova Scotia (n=481).

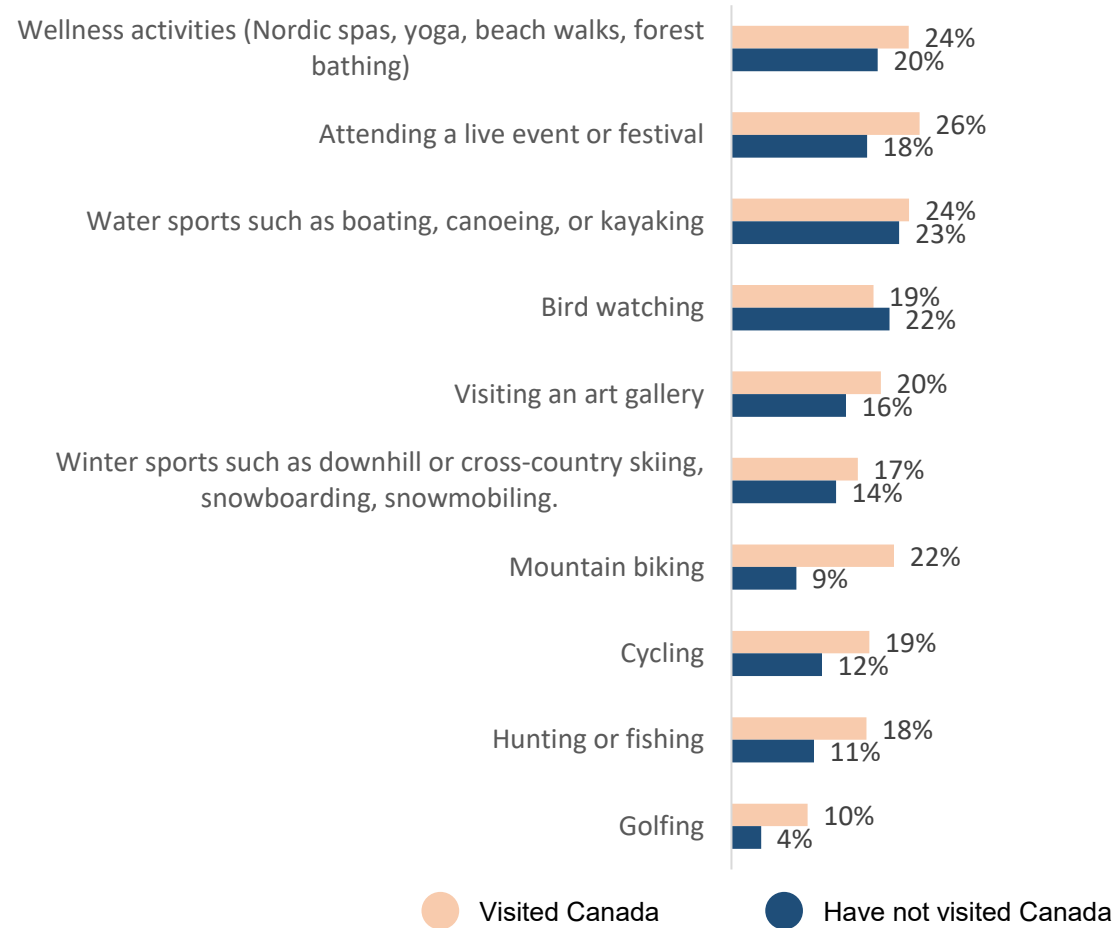
# FACTORS INFLUENCING VISITING NOVA SCOTIA – CONTINUED

**Golfing and hunting or fishing are most commonly identified as not motivating German travellers to visit Nova Scotia, particularly among certain segments. Golfing, in particular, is not a strong motivator among Outdoor Explorers.**

Other activities such as winter sports and mountain biking also show limited appeal overall, with mountain biking being less motivating for Refined Globetrotters.

In contrast, experiences such as water sports, wellness activities, attending live events or festivals, bird watching, and visiting art galleries are more often viewed as secondary reasons rather than primary drivers of travel. Attending live events is more motivating for Culture Seekers, but less so for Refined Globetrotters.

## Primary Reasons to Visit



C1. If you were travelling to Atlantic Canada (i.e., the provinces of New Brunswick, Newfoundland and Labrador, Nova Scotia or Prince Edward Island), to what extent would each of the following considerations impact your decision to visit? (3-point scale)  
 Respondents considering visiting Nova Scotia (n=481).

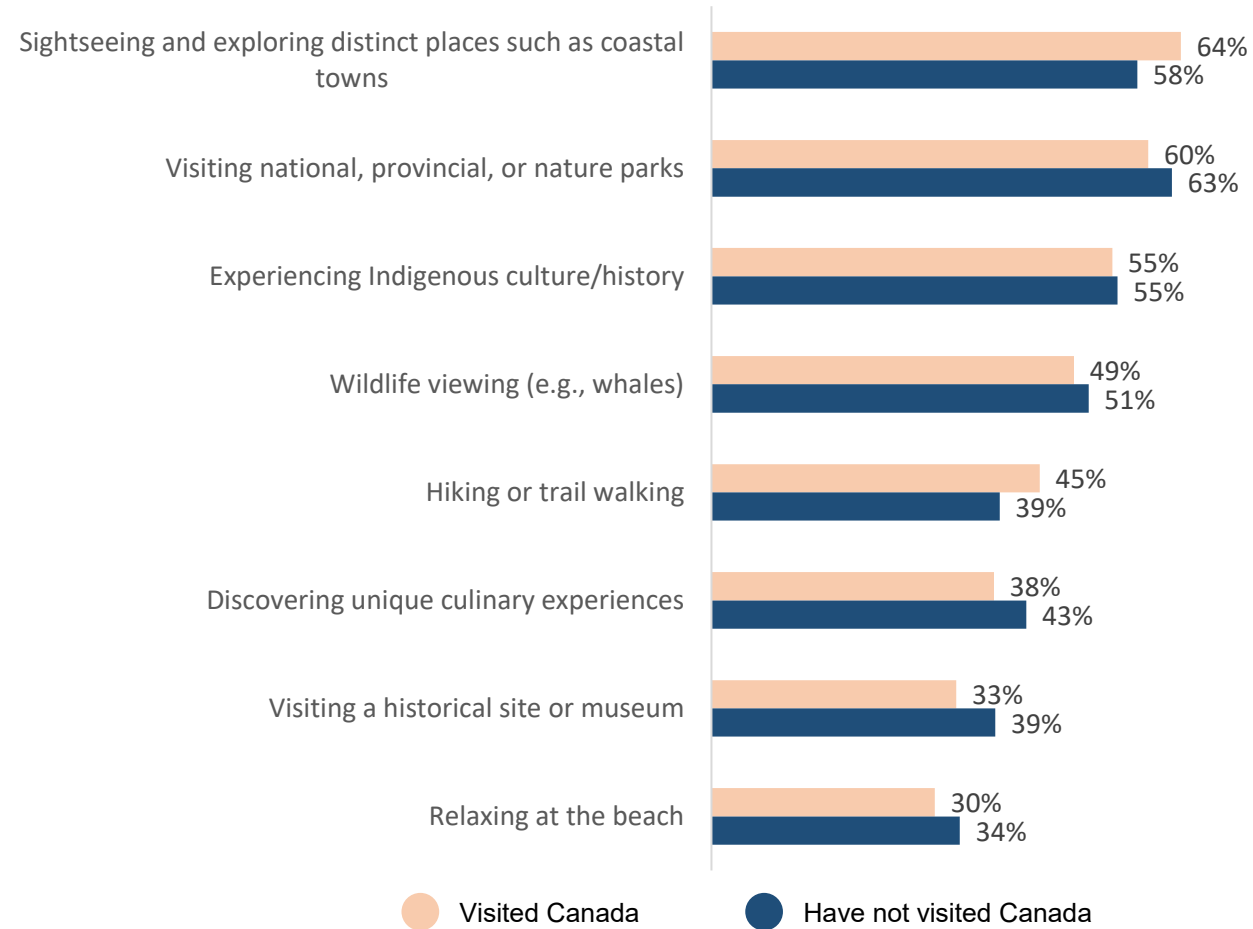
# FACTORS INFLUENCING VISITING PRINCE EDWARD ISLAND

**Sightseeing and exploring distinct places such as coastal towns is the leading factor influencing German travellers to visit Prince Edward Island, followed closely by visiting national, provincial, or nature parks and experiencing Indigenous culture and history.**

Visiting parks and wildlife viewing are particularly strong motivators for Outdoor Explorers, with hiking or trail walking also playing a meaningful role for this segment. Discovering unique culinary experiences also contributes to interest in the province.

Visiting historical sites or museums is more motivating for Purpose-Driven Families. Several additional experiences contribute as supporting motivations, including relaxing at the beach, which is more often identified as a secondary consideration rather than a primary driver.

## Primary Reasons to Visit



C1. If you were travelling to Atlantic Canada (i.e., the provinces of New Brunswick, Newfoundland and Labrador, Nova Scotia or Prince Edward Island), to what extent would each of the following considerations impact your decision to visit? (3-point scale)  
 Respondents considering visiting Prince Edward Island (n=424).

# FACTORS INFLUENCING VISITING PRINCE EDWARD ISLAND – CONTINUED

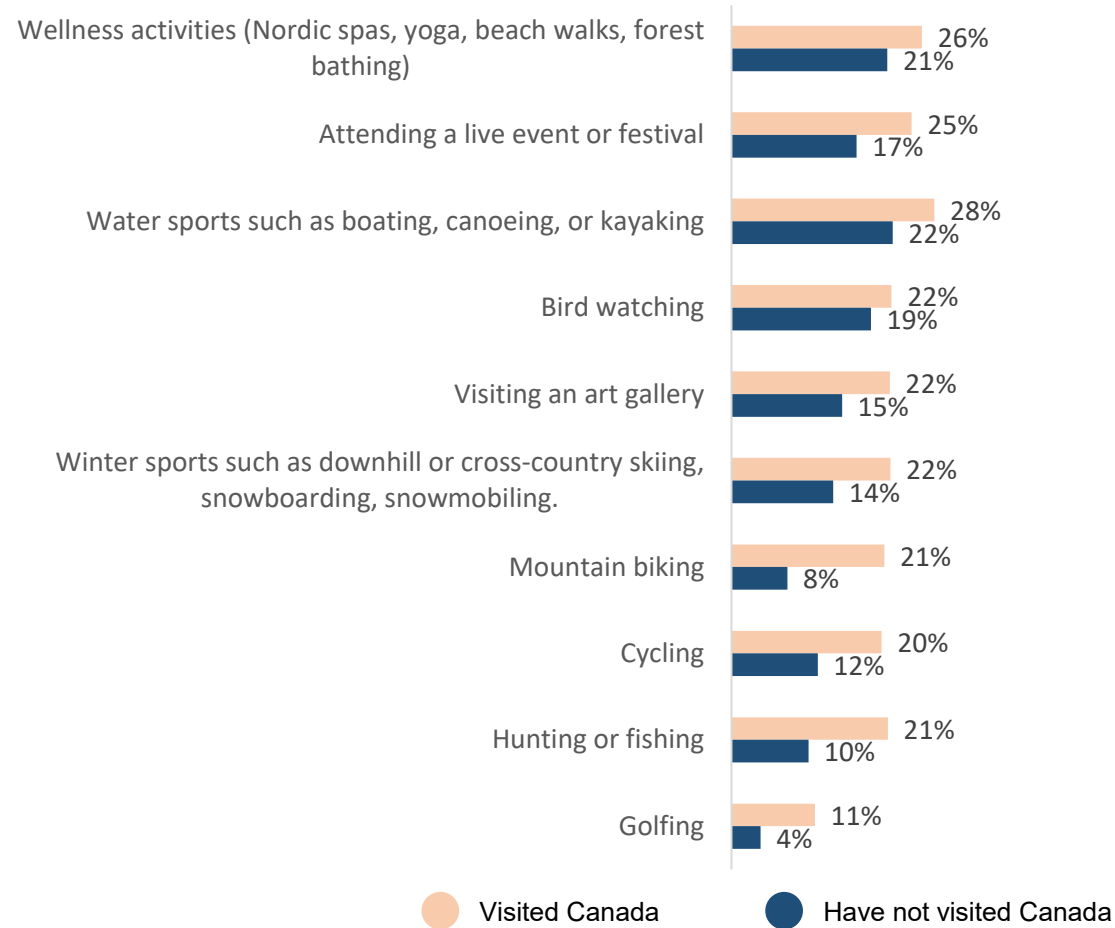
**Golfing and hunting or fishing are most commonly identified as not motivating German travellers to visit Prince Edward Island, with golfing especially weak among Outdoor Explorers.**

Winter sports, cycling, and mountain biking are also often not motivating, though cycling and mountain biking resonate more with Purpose-Driven Families.

Experiences such as water sports, wellness activities, events, bird watching, and art galleries are typically secondary considerations, with water sports appealing across segments.

Events are more motivating for Culture Seekers, but less so for Refined Globetrotters, while art galleries are less motivating for both Outdoor Explorers and Refined Globetrotters.

## Primary Reasons to Visit



C1. If you were travelling to Atlantic Canada (i.e., the provinces of New Brunswick, Newfoundland and Labrador, Nova Scotia or Prince Edward Island), to what extent would each of the following considerations impact your decision to visit? (3-point scale)  
 Respondents considering visiting Prince Edward Island (n=424).

# ATLANTIC CANADA'S APPEAL FACTORS (OPEN-ENDED)

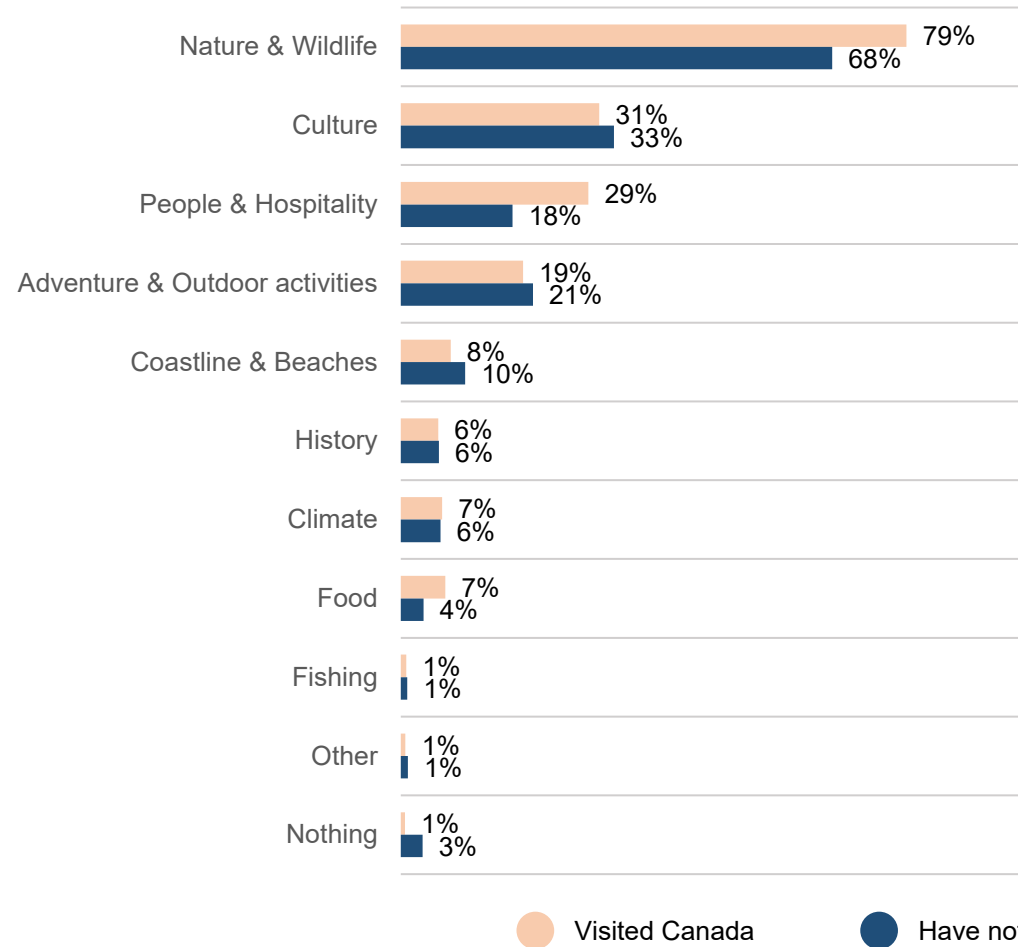
**Nature and wildlife are the standout draw, mentioned by nearly three-quarters of travellers.**

Culture, people and hospitality, and adventure/outdoor activities are important secondary strengths, reinforcing the region's image as scenic, welcoming, and active.

Coastlines and beaches, history, food, and climate play smaller but still complementary roles in shaping overall appeal.

Travellers who highlight nature and wildlife are more likely to have previously visited Newfoundland & Labrador, while those who mention history are more likely to have visited New Brunswick or Prince Edward Island.

## Key Factors of Appeal



“ *The impressive nature is probably the best Canada has to offer.* ”

“ *...from sports documentaries, I know that you can do great winter sports there, from cross-country skiing to downhill skiing.* ”

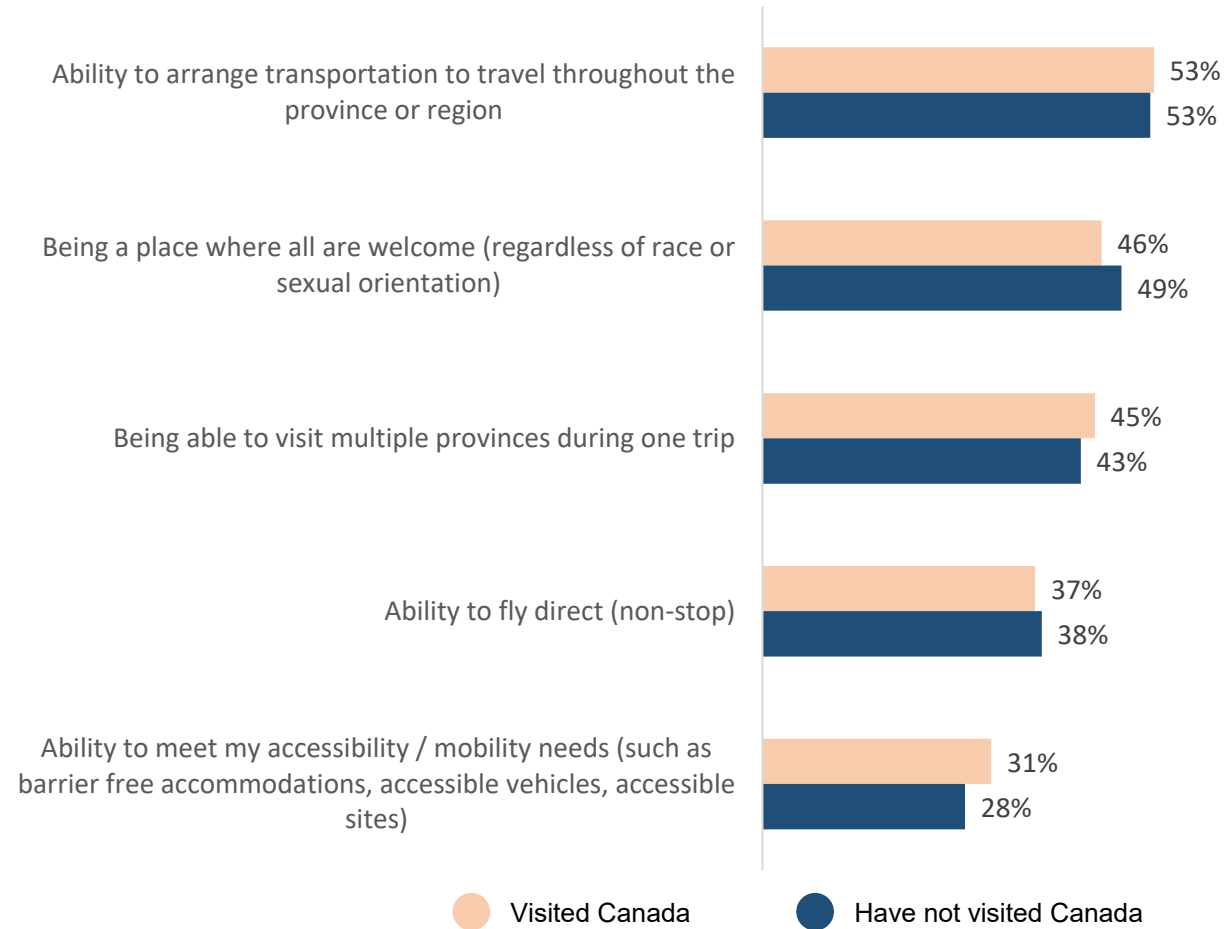
C2. Thinking about Atlantic Canada as a vacation destination generally, what, if anything about the region appeals to you? (open-ended)  
All respondents (n=1,012).

Among both markets, the ability to arrange transportation to travel throughout the province is the most important consideration for German travellers when visiting New Brunswick, with more than half identifying it as critically important.

Perceptions of being a welcoming destination and the ability to visit multiple provinces during one trip are also key considerations, both viewed as critically important by many travellers.

The availability of direct (non-stop) flights is somewhat less critical but still widely regarded as an important factor when planning travel to the province.

## Important Factors to Consider (TOP 2)



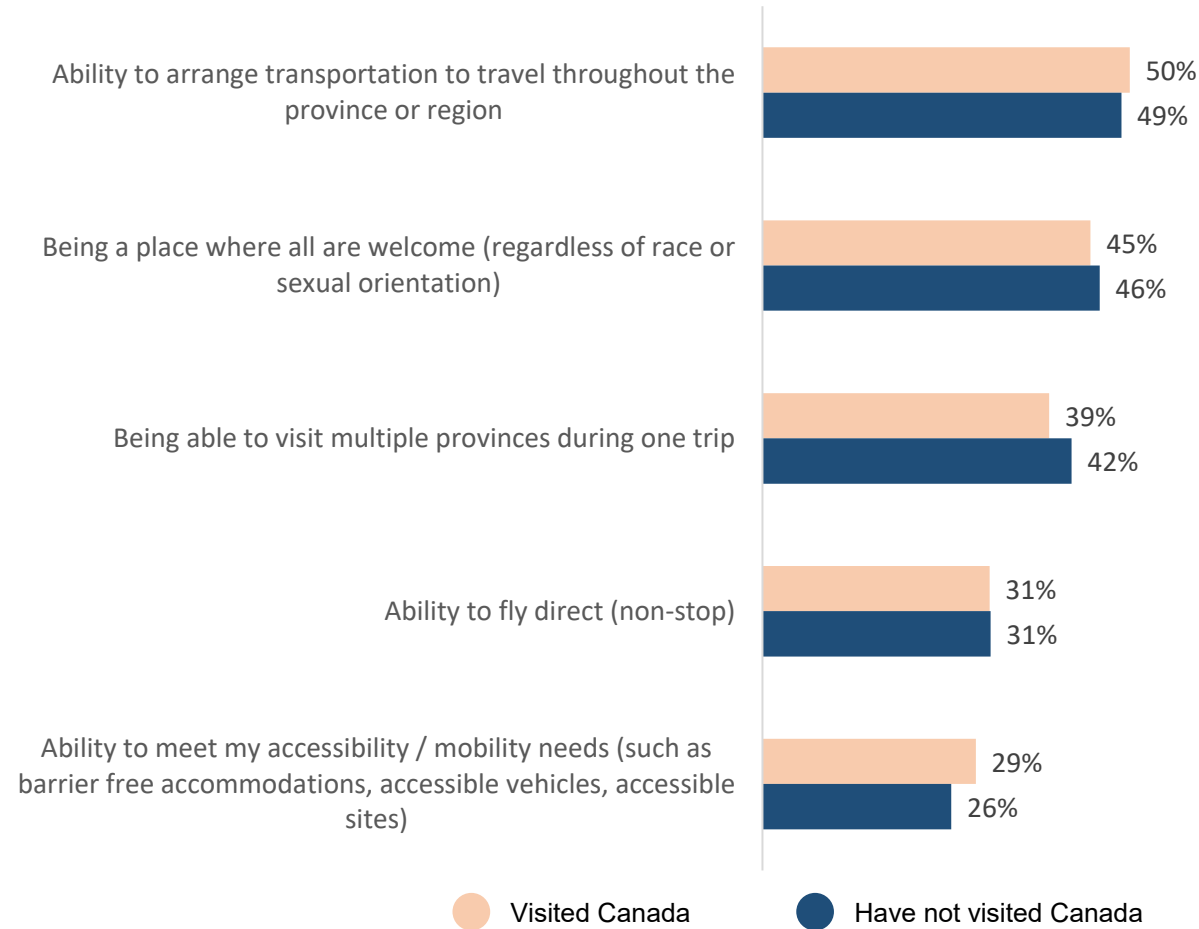
C3. How important would each of the following factors be when considering visiting Atlantic Canada (i.e., the provinces of New Brunswick, Newfoundland and Labrador, Nova Scotia or Prince Edward Island)? (4-point scale)  
 Respondents considering visiting New Brunswick (n=395).

**Among both markets, the ability to arrange transportation to travel throughout the province is the most important consideration for German travellers visiting Newfoundland & Labrador, with nearly half identifying it as critically important.**

The ability to visit multiple provinces during the same trip and perceptions of the destination as welcoming are also key considerations, both viewed as critically important by many travellers.

The availability of direct (non-stop) flights is generally considered important, though fewer travellers identify it as critically important compared to other factors.

**Important Factors to Consider (TOP 2)**



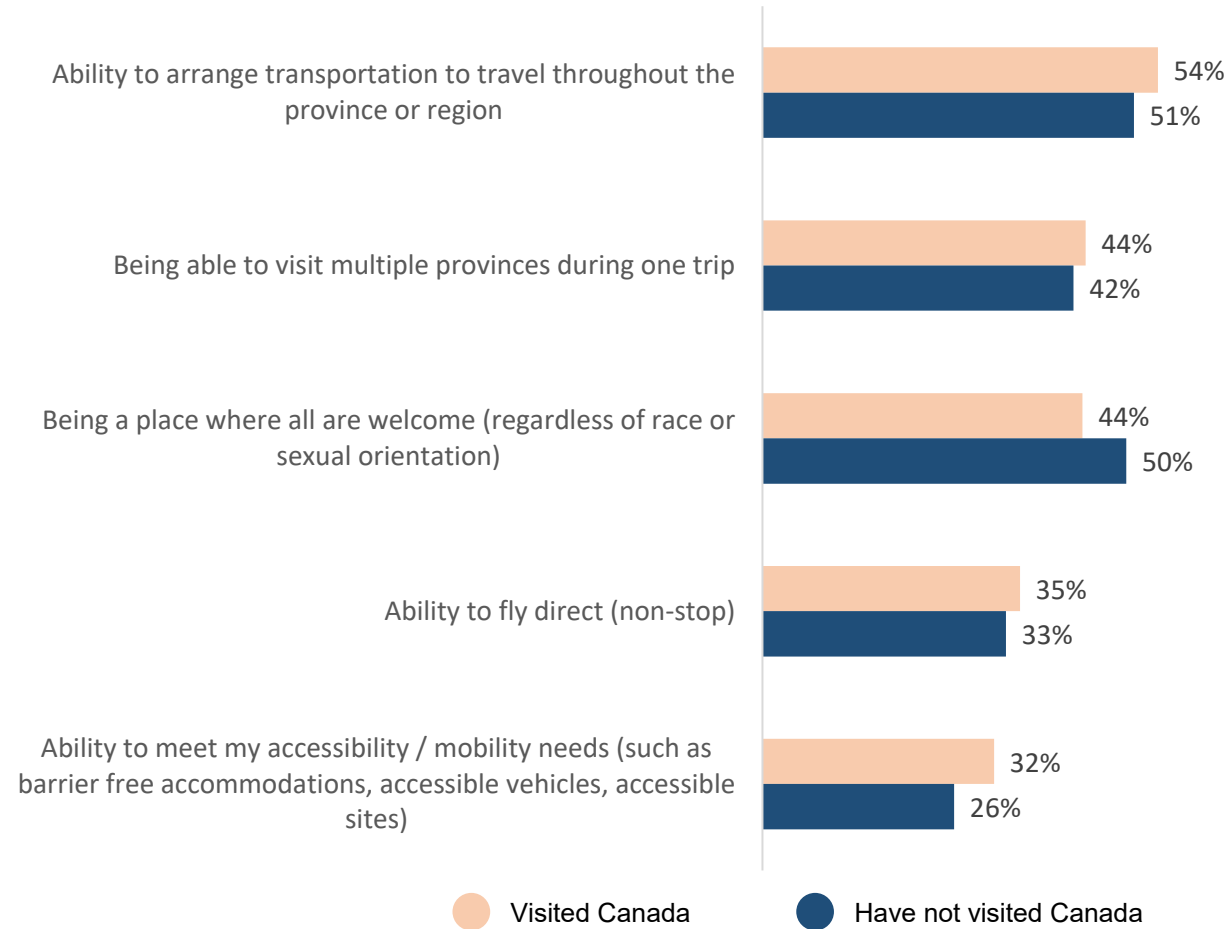
C3. How important would each of the following factors be when considering visiting Atlantic Canada (i.e., the provinces of New Brunswick, Newfoundland and Labrador, Nova Scotia or Prince Edward Island)? (4-point scale)  
 Respondents considering visiting Newfoundland & Labrador (n=480).

**The ability to arrange transportation to travel throughout the province is the most important consideration for German travellers planning a visit to Nova Scotia, with just over half identifying it as critically important.**

Perceptions of Nova Scotia as a welcoming destination and the ability to visit multiple provinces during the same trip are also key considerations, both viewed as critically important by many travellers.

The availability of direct (non-stop) flights is widely regarded as important, though fewer travellers consider it critically important compared to other factors.

## Important Factors to Consider (TOP 2)



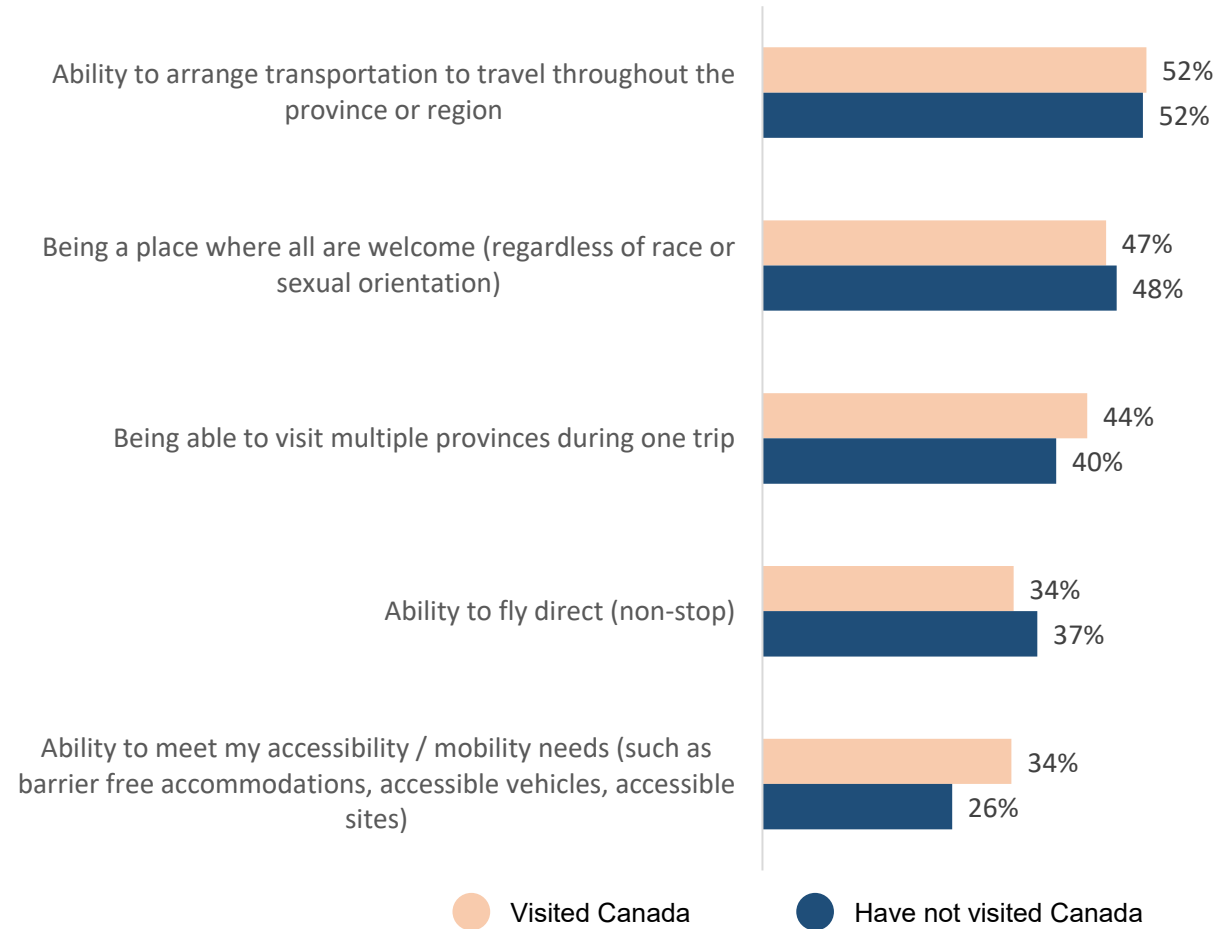
C3. How important would each of the following factors be when considering visiting Atlantic Canada (i.e., the provinces of New Brunswick, Newfoundland and Labrador, Nova Scotia or Prince Edward Island)? (4-point scale)  
 Respondents considering visiting Nova Scotia (n=481).

The ability to arrange transportation to travel throughout the province is one of the most important considerations for German travellers planning a visit to Prince Edward Island, with more than half identifying it as critically important.

Perceptions of Prince Edward Island as a welcoming destination and the ability to visit multiple provinces during the same trip are also key considerations, both viewed as critically important by many travellers.

The availability of direct (non-stop) flights is widely regarded as important, though fewer travellers consider it critically important compared to other factors.

## Important Factors to Consider (TOP 2)



C3. How important would each of the following factors be when considering visiting Atlantic Canada (i.e., the provinces of New Brunswick, Newfoundland and Labrador, Nova Scotia or Prince Edward Island)? (4-point scale)  
 Respondents considering visiting Prince Edward Island (n=424).

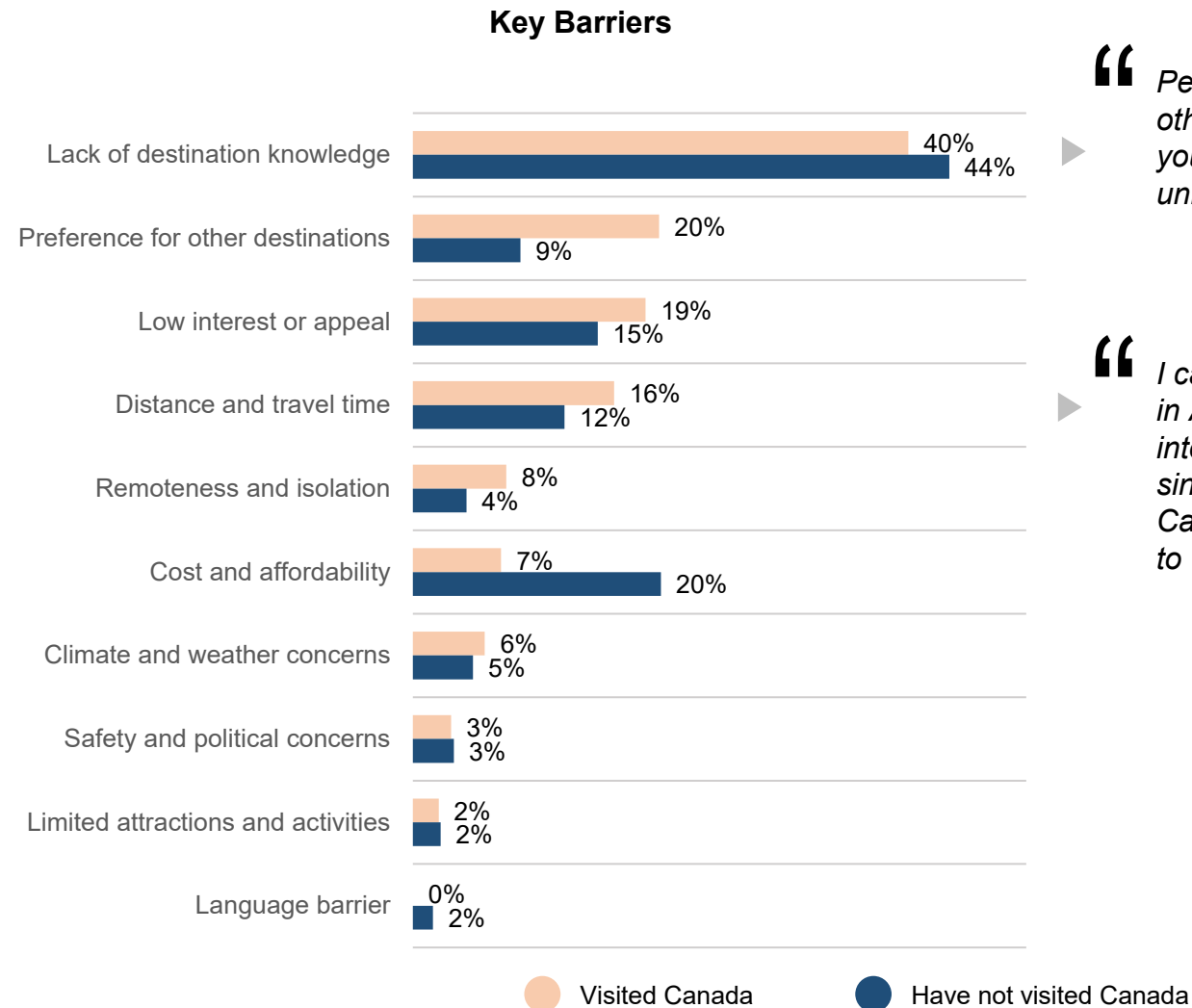
# BARRIERS TO VISITING ATLANTIC CANADA (OPEN-ENDED)

Among those considering a trip to Canada, around three in ten are not considering Atlantic Canada as a destination: 23% of previous Canada visitors and 33% of those who have not yet visited.

Lack of destination knowledge is by far the most significant barrier, cited by nearly half of German travellers as a reason they haven't considered visiting Atlantic Canada.

Cost and affordability concerns, along with low overall interest or appeal, are secondary barriers mentioned by about one in six respondents each.

Distance, travel time, and preference for other destinations present moderate challenges, while factors like remoteness, climate concerns, and limited attractions play relatively minor roles.



“ People always talk about other regions, which makes you think that these are uninteresting. ”

“ I can imagine that the places in Atlantic Canada are interesting and beautiful, but since I've never been to Canada before, I would tend to visit other provinces first. ”

F2. What, if anything, keeps you from considering Atlantic Canada as a vacation destination? (Open-ended)  
 Respondents who are not considering travel in the next 2 to at least one of the Atlantic Canadian provinces and have visited Canada (n=86).  
 Respondents who are not considering travel in the next 2 to at least one of the Atlantic Canadian provinces and have not visited Canada (n=139).

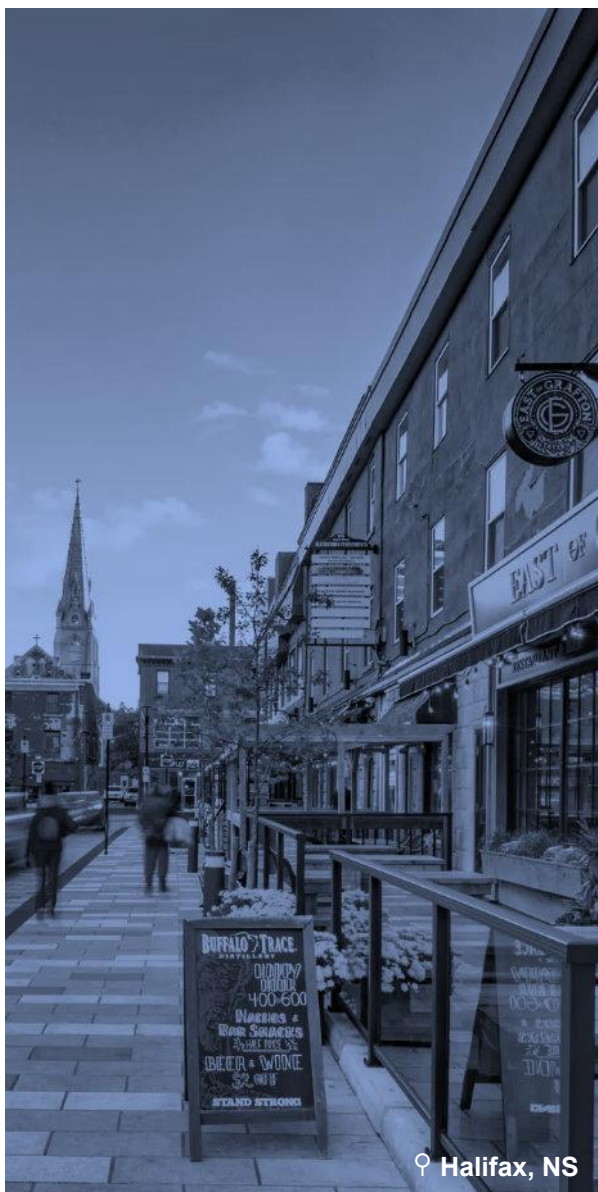
## TRAVEL PLANNING BEHAVIOUR

German travellers show mixed planning timelines for trips to Atlantic Canada. Around one-third say they research and book less than one month in advance, consistent across both past visitors and non-visitors. Longer planning windows are also common, particularly among past visitors, with 28% reporting that they research and book four to six months in advance, compared with slightly smaller shares of non-visitors.

Online search is the leading source of travel information for Atlantic Canada, followed by official tourism websites. Past visitors are more likely to use booking websites such as Expedia, while non-visitors rely more on travel agents and tour operators. Usage also varies by segment, with Refined Globetrotters more likely to consult official tourism websites, younger travellers more likely to use social media, and retired travellers more likely to rely on travel agents or tour operators.

Awareness of direct flights from Germany to Atlantic Canada is higher among past visitors than non-visitors. However, uncertainty remains around where these flights operate. While Nova Scotia is most commonly identified, some travellers incorrectly associate other Atlantic provinces with direct access or remain unsure, particularly those aged 55+ and retirees.

About half of German travellers say they would use a travel agent or tour operator when planning a trip to Atlantic Canada, with slightly higher interest among non-visitors. The main reasons are support with flights and accommodations, while interest in using agents is highest among past visitors aged 35–44 and non-visitors aged 65+.



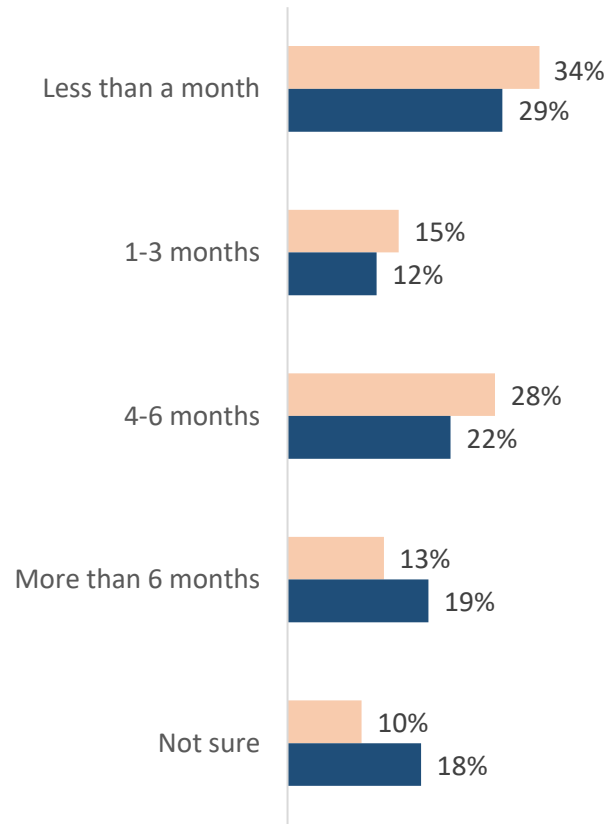
📍 Halifax, NS

# TRIP PLANNING TIMELINES

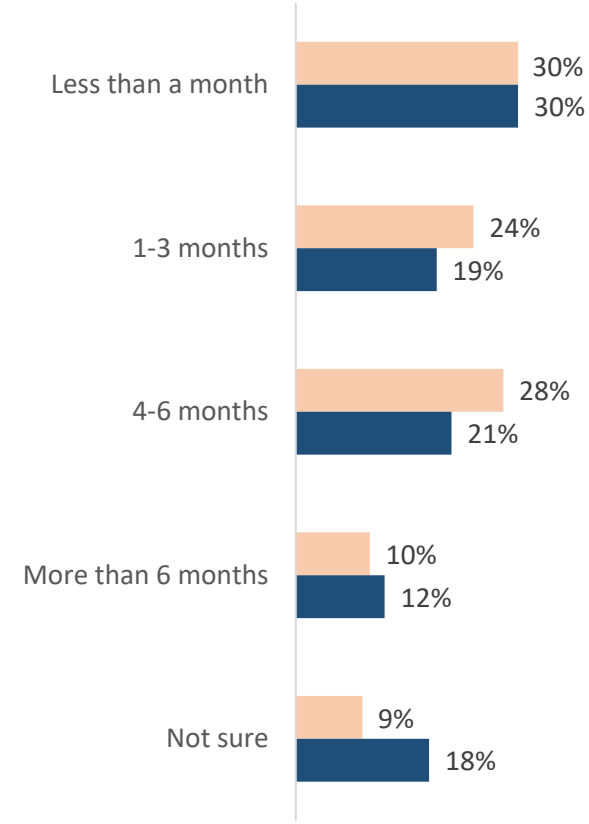
**Around one-third of German travellers plan and book trips to Atlantic Canada less than one month in advance, consistent across both markets.**

Longer planning timelines are also common, with 28% of travellers who have visited Canada reporting they research and book 4–6 months in advance. Slightly smaller shares of non-visitors report the same for researching (22%) and booking (21%).

**Months in Advance to Research and Plan**



**Months in Advance to Book**



● Visited Canada      ● Have not visited Canada

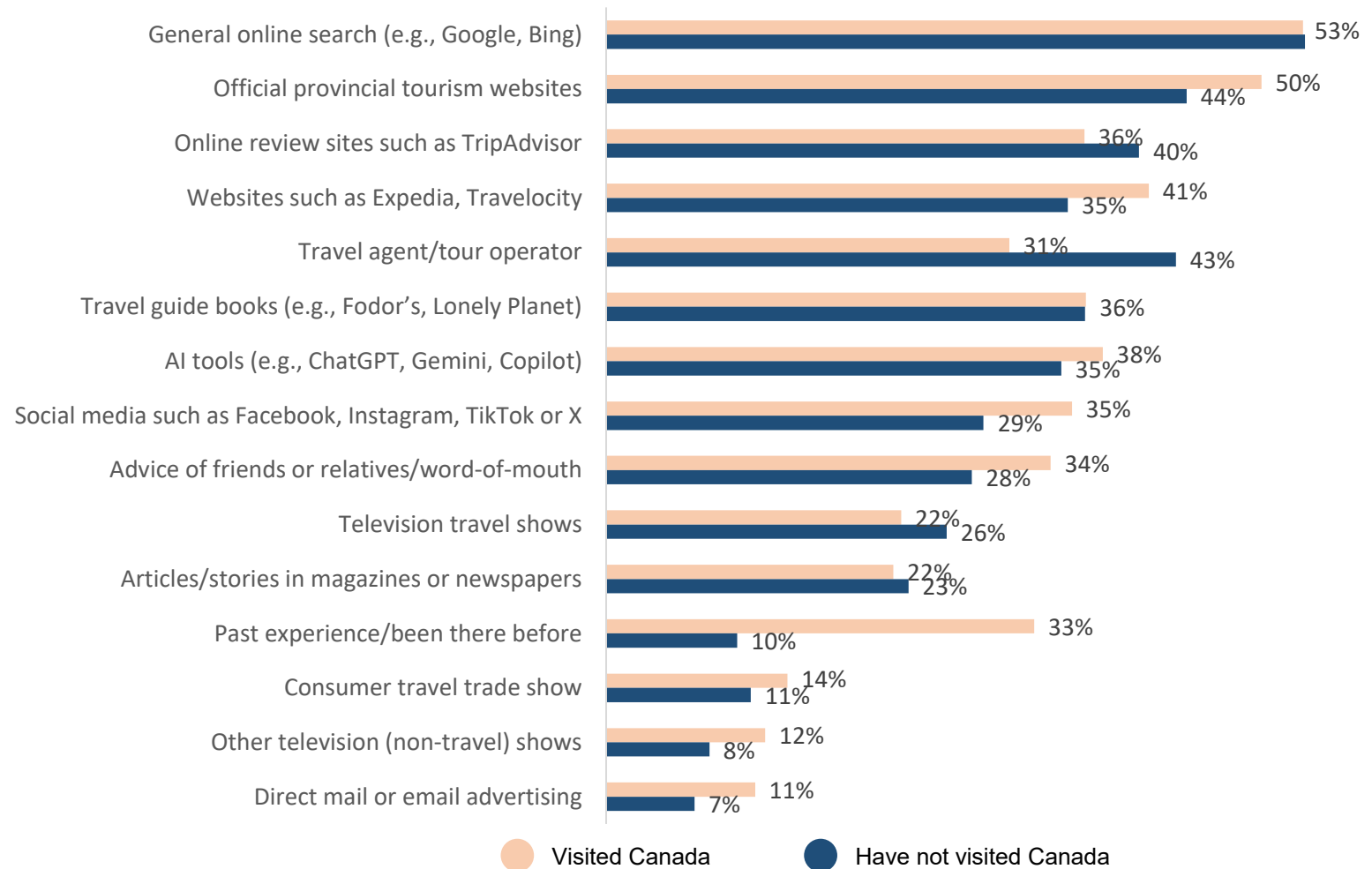
P1. How many months in advance would you start planning/researching such a trip to Atlantic Canada? (Categorical input)  
 Respondents who are considering travel in the next 2 to at least one of the Atlantic Canadian provinces. (n=614)  
 P2. And how many months in advance would you start booking such a trip to Atlantic Canada? (Categorical input)  
 Respondents who are considering travel in the next 2 to at least one of the Atlantic Canadian provinces. (n=613)

**Online search is the leading information source for Atlantic Canada among German travellers, followed by official tourism websites; past visitors favour websites such as Expedia, while non-visitors rely more on tour agents/operators.**

Travellers also rely on a mix of planning tools, including travel agents, guidebooks, booking websites, and AI tools such as ChatGPT or Gemini, each used by roughly one-third of respondents.

Usage of information sources varies by traveller segment. Refined Globetrotters are more likely to consult official tourism websites, while younger travellers are more likely to rely on social media. Retired travellers are more likely to seek information through travel agents or tour operators.

### Travel Information Sources



P3. Where would you look for information on Atlantic Canada? (Multi-select)  
 Respondents who are considering travel in the next 2 to at least one of the Atlantic Canadian provinces. (n=614)

# NON-STOP FLIGHTS FROM GERMANY

Three-fifths of German travellers who have visited Canada are aware of direct flights from Germany to Atlantic Canada, compared to half of those who have not.

However, there is notable ambiguity around where these flights actually operate. While Nova Scotia, the only Atlantic province with direct flights, is most commonly identified, less than one-quarter of travellers incorrectly associate the other provinces with direct access or remain unsure.

Beyond Germany, some travellers are aware of direct connections from other European markets, most commonly the United Kingdom, followed by France and the Netherlands.

Overall, uncertainty remains higher among older travellers (55+) and retirees.

## Awareness of Direct Flights from Germany to Atlantic Canada

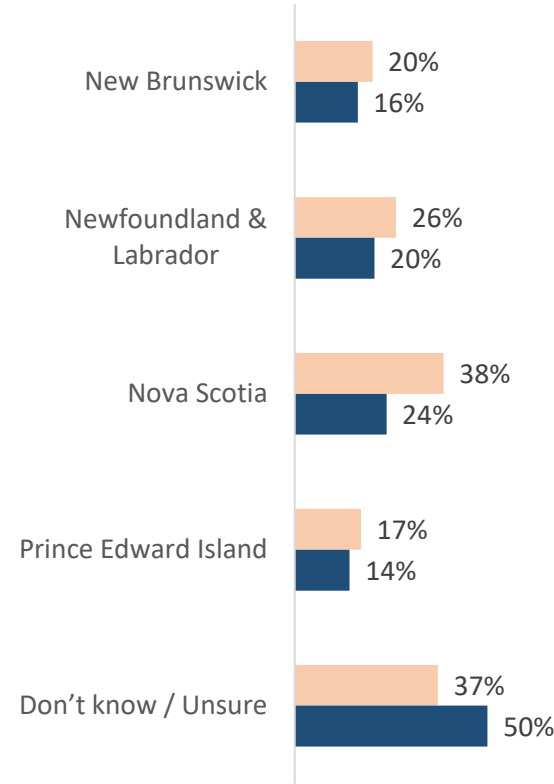
Those who have visited Canada

**61%**

Those who have not visited Canada

**50%**

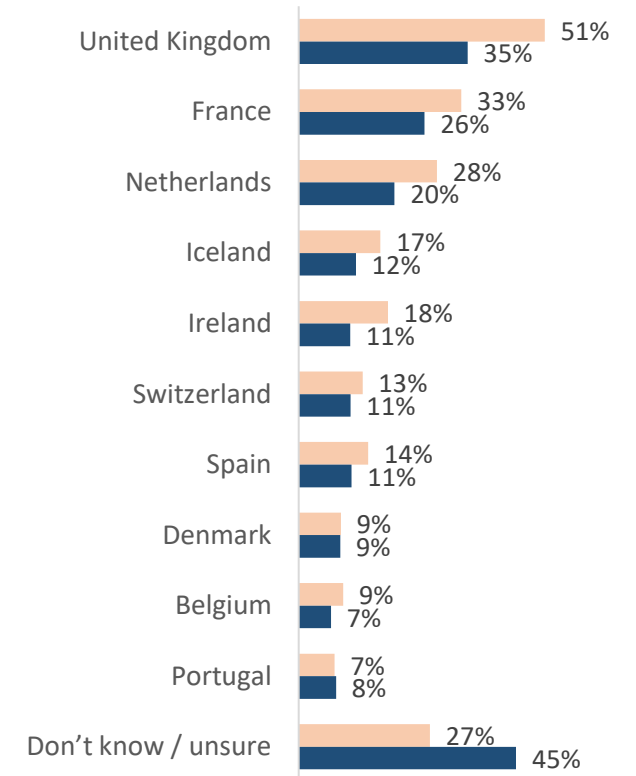
## Perceptions of direct flights from Germany to..



● Visited Canada

● Have not visited Canada

## Perceptions of direct flights to Atlantic Canada from..



P4. To the best of your knowledge, are there direct (non-stop) flights to Atlantic Canada from Germany? (Single-select)/ P5B. To the best of your knowledge, from which of these other countries can you fly direct (non-stop) to Atlantic Canada? (Multi-select)  
All respondents (n=1,012).

P5. Which province(s) in Atlantic Canada can you fly directly to (non-stop) from Germany? (Multi-Select)  
Respondents who are aware of direct (non-stop) flight from Germany (n=550).

About half of German travellers indicate they would use a travel agent or tour operator when planning a trip to Atlantic Canada, with slightly higher interest among those who have not previously visited Canada, primarily for support with researching and booking flights and accommodations.

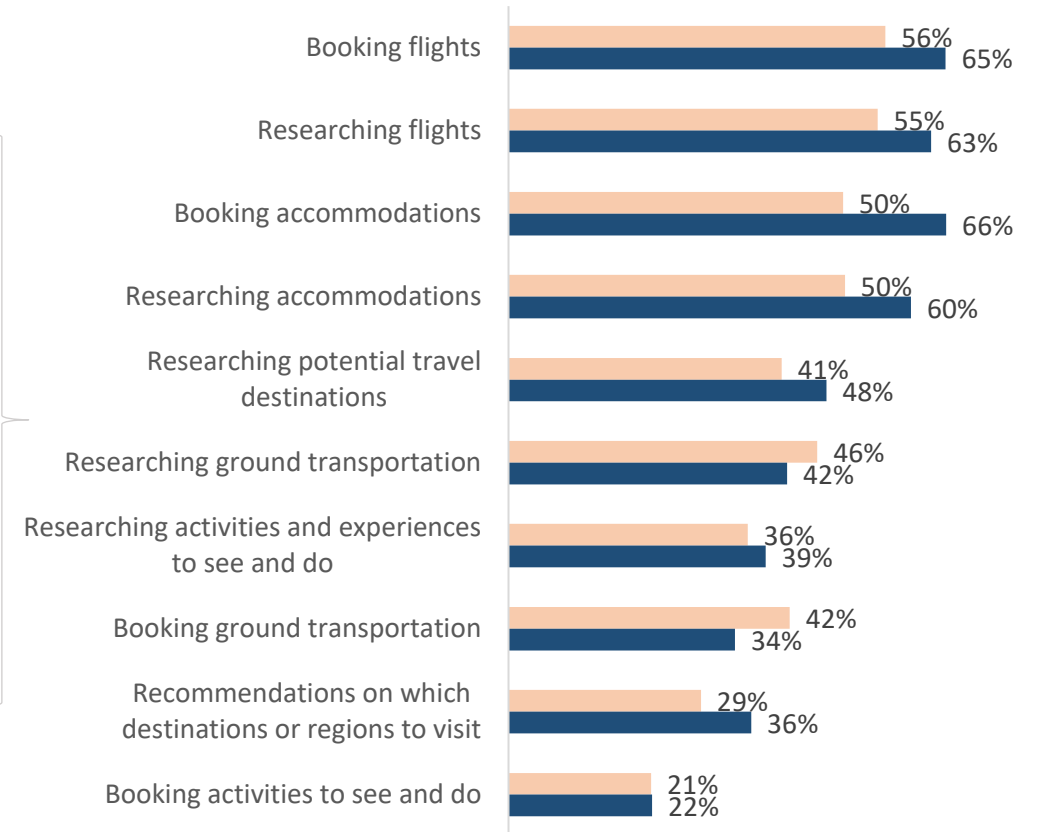
Usage varies by segment: Northern German travellers are more likely to seek help with ground transportation, while older travellers (65+) tend to rely on agents for booking flights and activities.

Those who have visited Canada are more likely to use agents for ground transportation between non-visitors, whereas non-visitors report broader use cases, including a stronger reliance on agents for booking accommodations.

Likelihood Using a Travel Agent/Tour Operator		
	Visited Canada	Have Not Visited Canada
<b>Overall</b>	<b>49%</b>	<b>52%</b>
New Brunswick	53%	64%
Newfoundland & Labrador	55%	58%
Nova Scotia	51%	61%
Prince Edward Island	58%	62%

● Visited Canada      ● Have not visited Canada

## Reasons to Use a Travel Agent/Tour Operator



P6. If planning a trip to Atlantic Canada, how likely would you be to use a travel agent or tour operator to help plan, organize or book your travel arrangements? (5-point scale)  
All respondents (n=1,012).

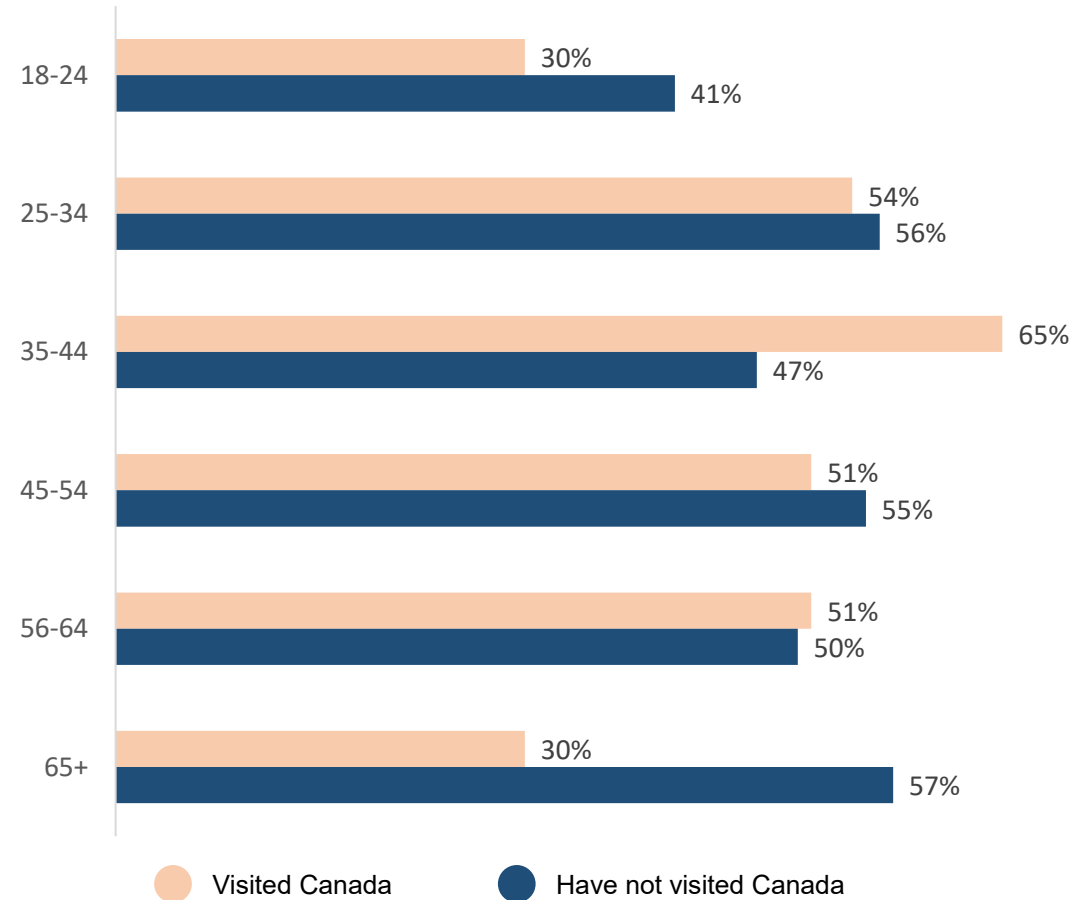
P7. What services would you likely use a travel agent / tour operator for when planning a trip to Atlantic Canada? (Multi-select)  
Respondents who are likely to use travel agents or tour operators. (n=514).

# TRAVEL PLANNING ASSISTANCE – AGE

Around two in three German travellers aged 35–44 report using travel agents or tour operators, making this the most common age group among those who have visited Canada. In contrast, among those who have not visited Canada, travellers aged 65+ are the most likely to use travel assistance, at close to three in five.

Among non-visitors, usage of travel agents is relatively consistent across age groups, with similar rates followed closely among those aged 25–34 (56%) and 45–54 (55%).

### Likelihood by Age Groups Using a Travel Agent/Tour Operator (TOP 2)



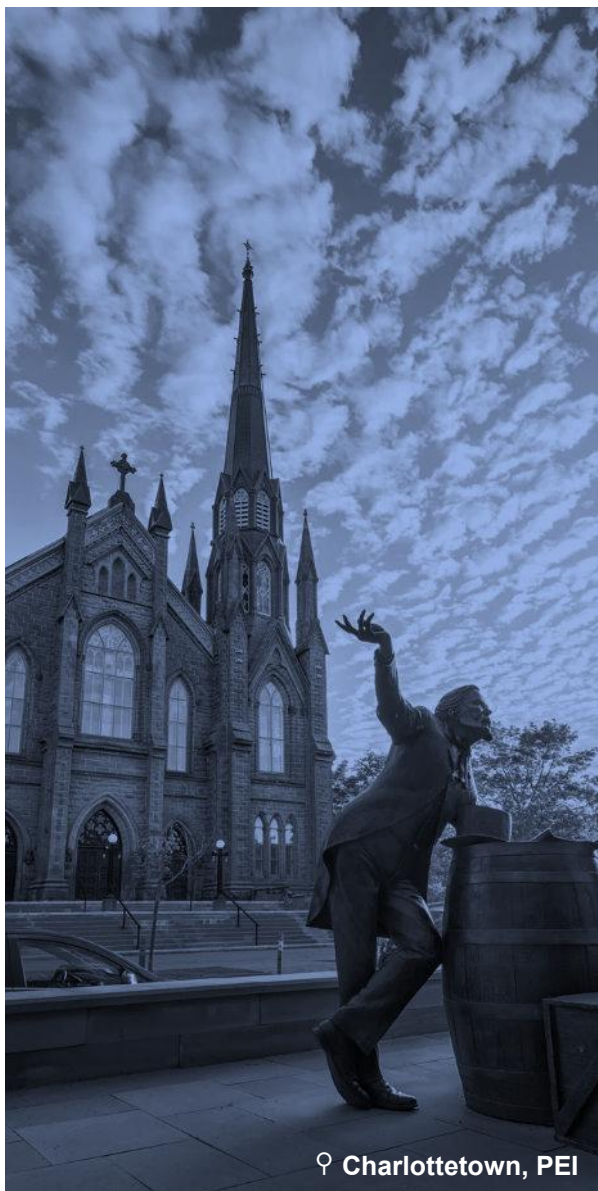
P6. If planning a trip to Atlantic Canada, how likely would you be to use a travel agent or tour operator to help plan, organize or book your travel arrangements? (5-point scale)  
All respondents (n=1,012).

## GEOPOLITICAL CONTEXT

German travellers who have previously visited Canada hold more positive perceptions of the country than those who have not. Across both groups, Canada is widely seen as a safe destination, as having values aligned with travellers' personal beliefs, and as politically neutral. These perceptions are particularly strong among those who have visited Canada within the past five years, who are significantly more likely to view Canada favourably on measures such as safety, value alignment, ease of entry, and favourable exchange rates. Perceptions of accessibility are especially strong among travellers who have visited Newfoundland & Labrador, while full-time workers are significantly more likely to view Canada as offering good value through a favourable exchange rate.

The current geopolitical climate appears to have a moderate impact on interest in visiting Canada among German travellers who have previously visited the country, while its effect is lower among those who have not visited, as fewer in this group report increased travel interest. For Atlantic Canada specifically, the geopolitical climate appears to have even less influence than it does for Canada overall, with a greater share of travellers across both visitor and non-visitor groups saying it has had no impact on their interest in visiting the region.

Looking ahead, travel sentiment toward Canada remains relatively stable among those who have visited before, while non-visitors are more likely to remain outside the market altogether. Past visitors show a slight net increase in intentions to take more trips to Canada compared to last year, while non-visitors show a modest decline. In contrast, both groups report a more pronounced decline in intentions to travel to the United States. This pattern suggests that Canada may currently be viewed more favourably than the United States as a travel destination, potentially reflecting broader geopolitical dynamics and shifting political sentiment toward the U.S.



📍 Charlottetown, PEI

# PERCEPTIONS OF CANADA

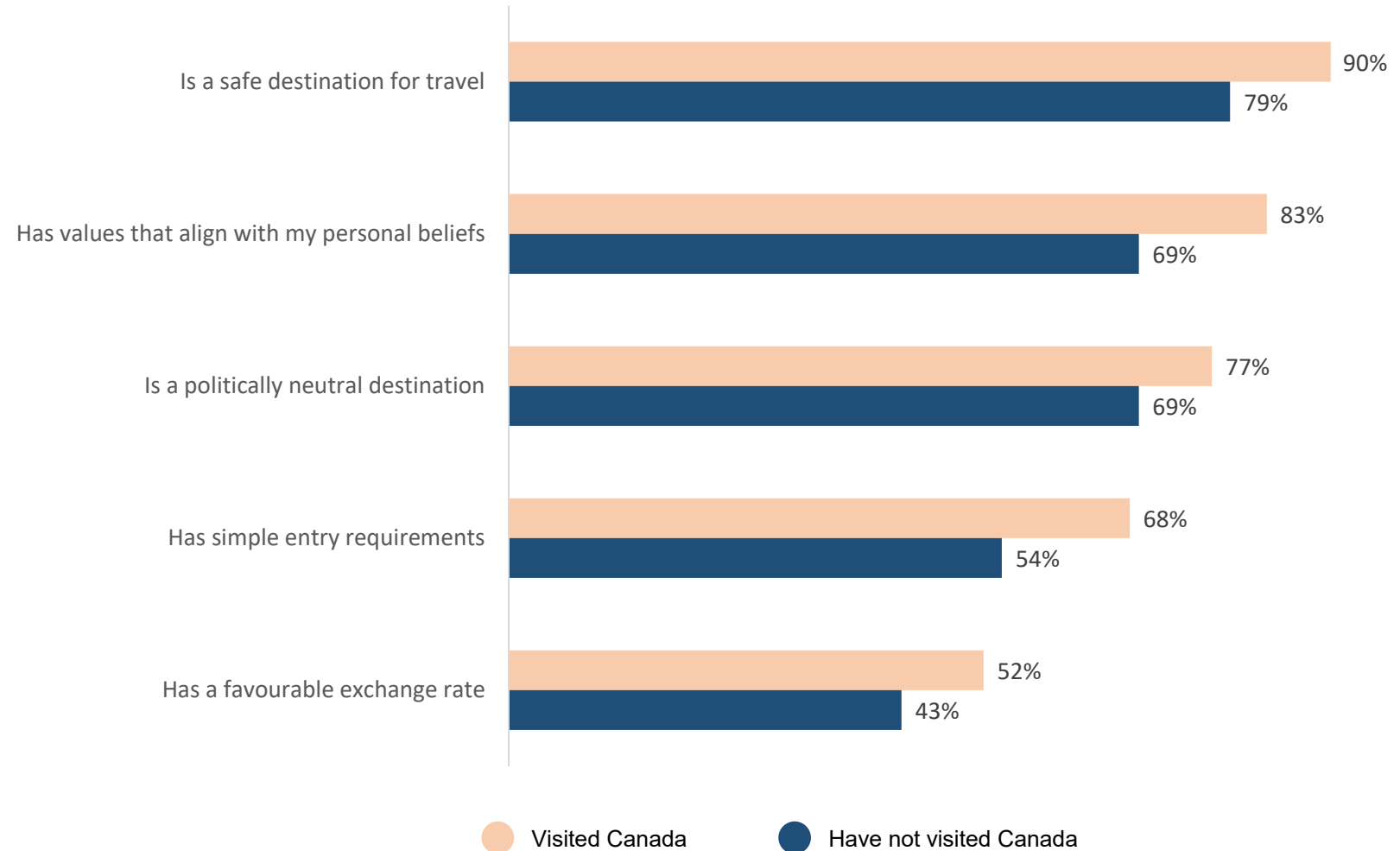
German travellers who have previously visited Canada hold more positive perceptions of the country than those who have not. Across both groups, Canada is widely seen as a safe destination, values aligned with personal beliefs, and politically neutral.

Recent visitors (past 5 years) hold significantly stronger perceptions of Canada as a destination, particularly regarding safety, value alignment, ease of entry, and favourable exchange rates.

Visitors to Newfoundland & Labrador are especially likely to perceive Canada as having simple entry requirements.

Full-time workers are also significantly more likely to view Canada as offering a favourable exchange rate.

## Canada as a Travel Destination (TOP 2)



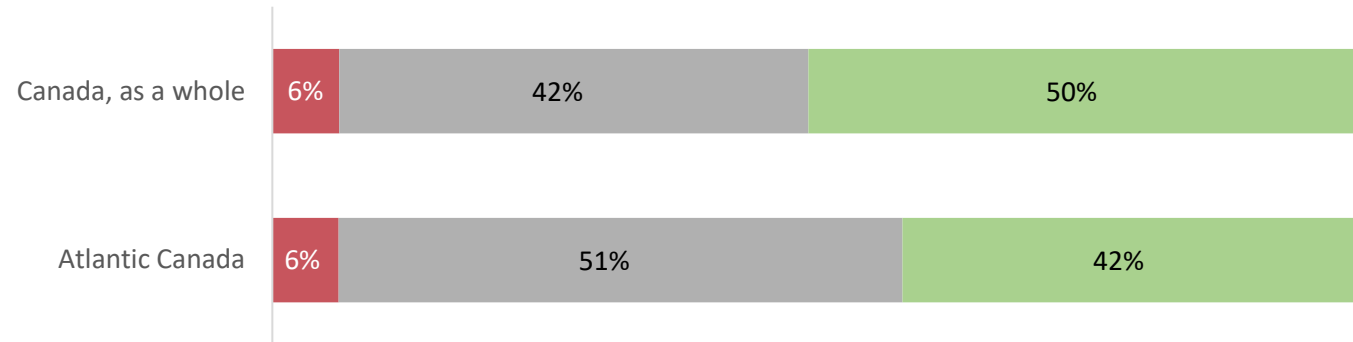
G1. Thinking only about Canada as a travel destination, how much do you agree or disagree that Canada... (5-point scale)  
All respondents (n=1,012).

The current geopolitical climate appears to have a moderate impact on German travellers who have previously visited Canada, but a lower impact on those who have not, as fewer report an increase in travel interest.

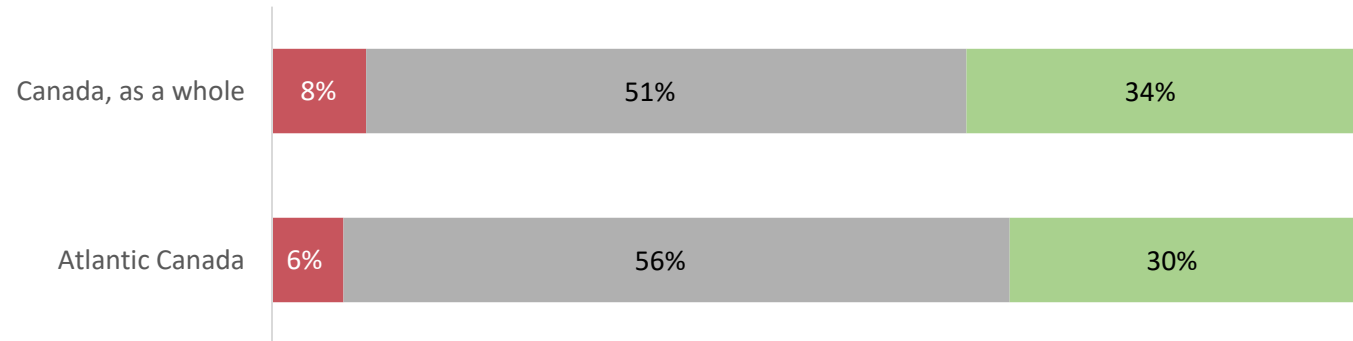
For Atlantic Canada specifically, the geopolitical climate has even less influence than for Canada overall, with a larger share of travellers across both groups indicating no impact on their interest in visiting the region.

German travellers who express greater interest in Canada and the Atlantic Canadian provinces are significantly more likely to have visited the country in the past five years and to be employed full-time.

## Visited Canada - The Political Climate Affected My Interest Travelling to...



## Have Not Visited Canada - The Political Climate Affected My Interest Travelling to...



● Decreased my interest    
 ● Had no impact on my interest    
 ● Increased my interest

G2. Thinking about the current global geo-political climate, how has this affected your interest in travelling to... (3-point-scale)  
All respondents (n=1,012).

# CANADA & US TRAVEL TYPES

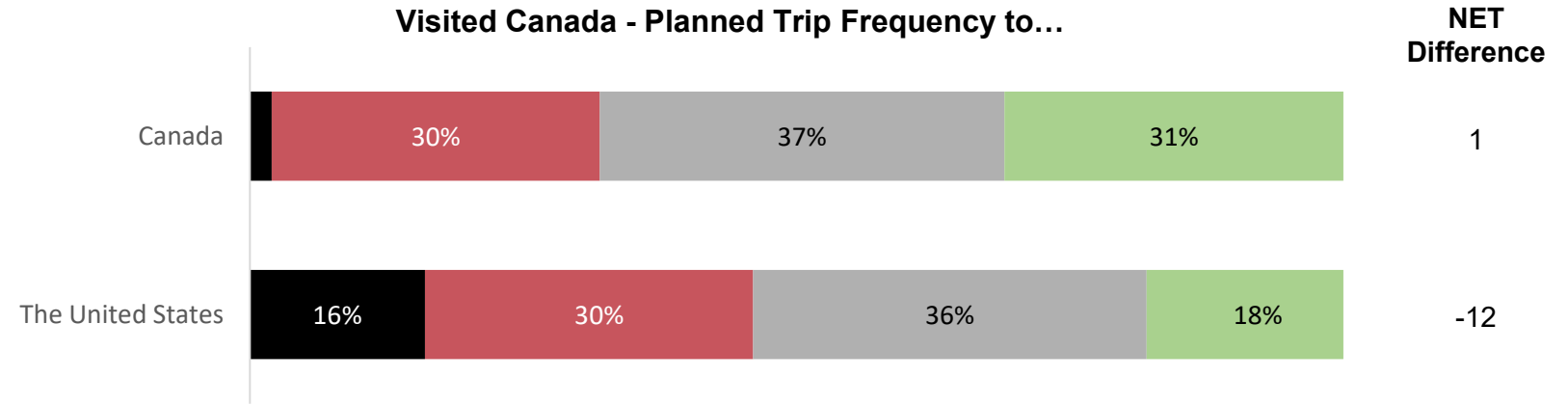


Among German travellers who have visited Canada, trip intentions remain relatively stable year-over-year, while non-visitors show the strongest tendency to continue not considering a trip.

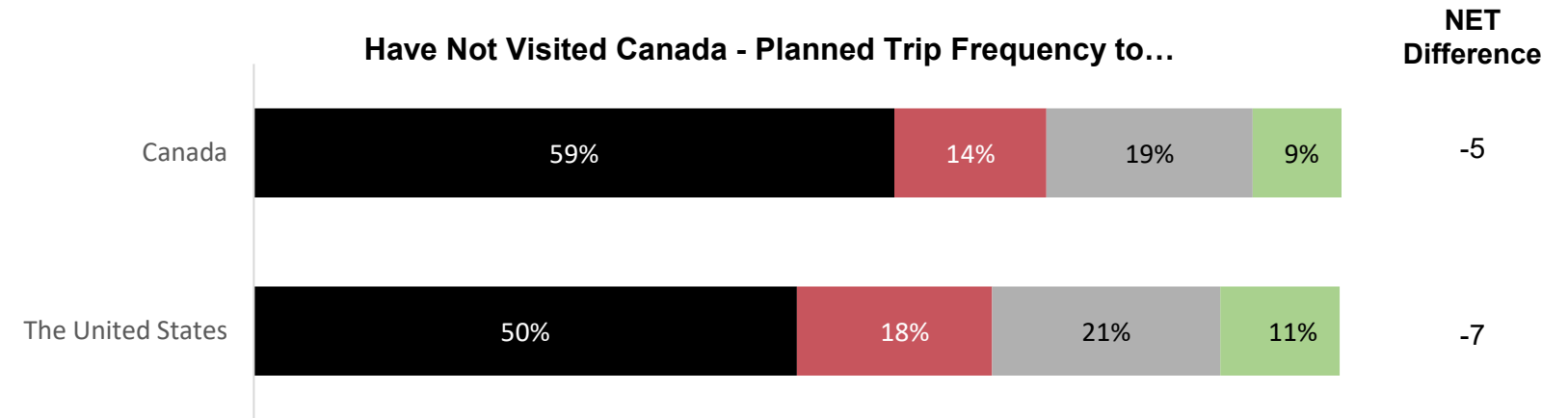
There is a slight increase in intentions to take more trips among past visitors (+1), compared to a decrease among non-visitors (-5); however, both groups report larger declines in travel intentions to the United States (-12 and -7, respectively).

This pattern suggests that Canada may currently be viewed more favourably as a travel destination relative to the United States. Broader geopolitical dynamics and political sentiment toward the United States may be influencing these perceptions and travel intentions.

## Visited Canada - Planned Trip Frequency to...



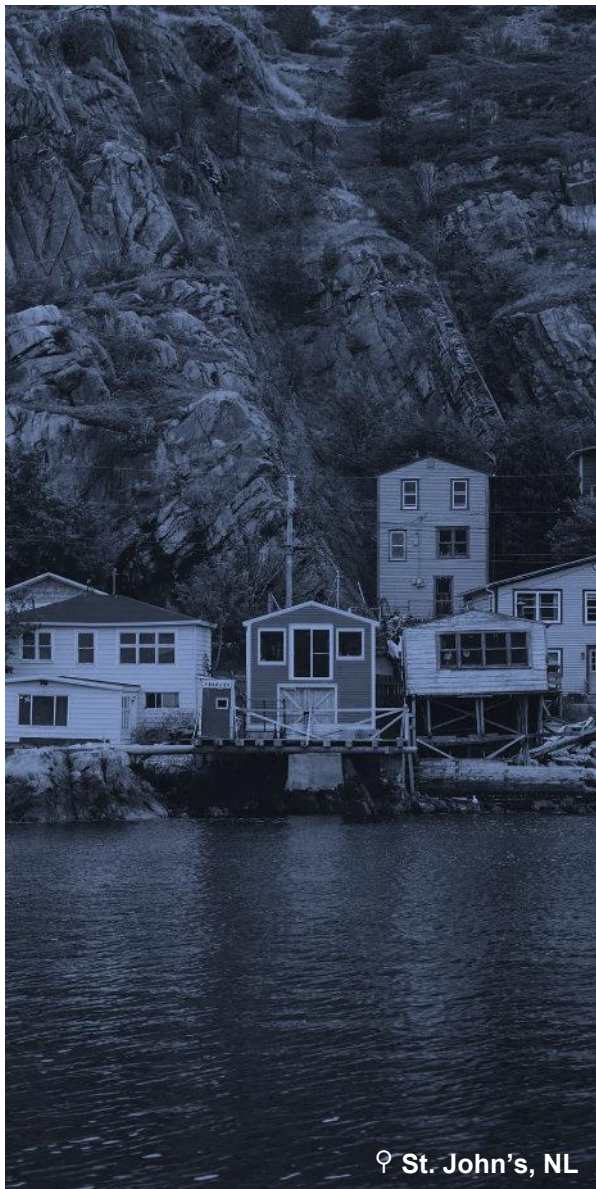
## Have Not Visited Canada - Planned Trip Frequency to...



Never take these trips
  Fewer trips
  The same number
  More trips

Note: NET Difference = More trips – Fewer trips

T8. For each of the following types of travel, are you considering taking more trips, the same number of trips, or fewer trips this year compared to last year. (4-point-scale)  
All respondents (n=1,012).



♀ St. John's, NL

## POTENTIAL TRAVELLER PROFILE

Across all four Atlantic provinces, German travellers considering a visit are primarily motivated by nature experiences, cultural activities, and authentic travel opportunities. The largest traveller segment across each province is Outdoor Explorers, representing roughly one-third of potential visitors, followed by Culture Seekers and Refined Globetrotters, highlighting strong interest in nature, heritage, and immersive travel experiences.

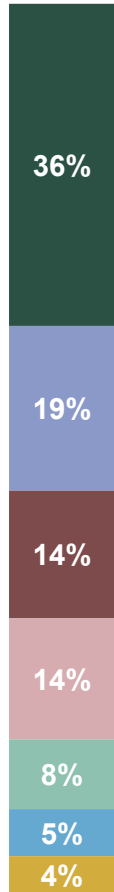
Across provinces, travellers are most likely to travel with a spouse or partner, with smaller shares travelling with children or a mix of family and friends. The potential market spans a broad age range, with particularly strong representation among travellers aged 25–54.

Most potential visitors are employed full-time and distributed across middle- to higher-income brackets, suggesting a financially active traveller base. Geographically, respondents are most commonly located in Western and Southern Germany, which account for the largest shares of potential travellers considering trips to the Atlantic provinces.

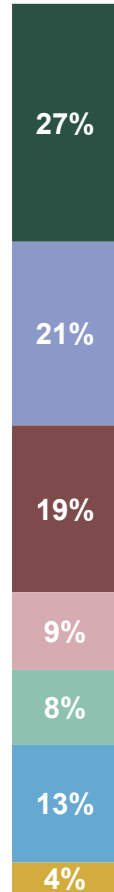
Overall, while traveller motivations and profiles remain broadly consistent across provinces, the segmentation highlights opportunities to position each destination around nature, culture, and authentic regional experiences that appeal to these core traveller groups.

# POTENTIAL TRAVELLER PROFILE: NEW BRUNSWICK

## Visited Canada



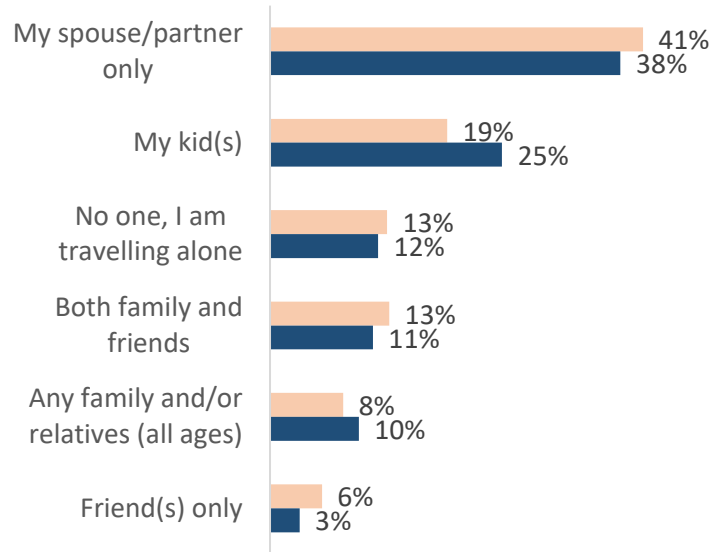
## Have not Visited Canada



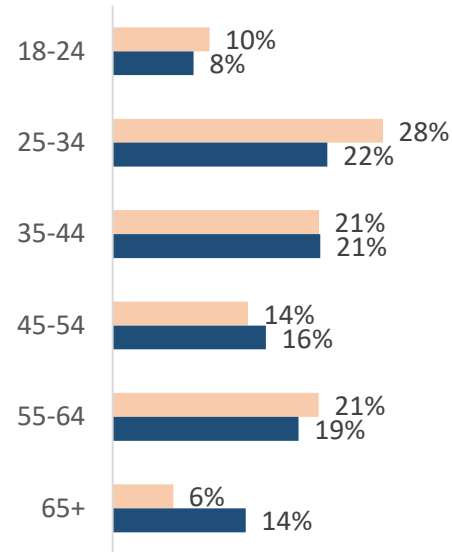
		Top Travel Activities	Travel Motivations	Ideal Destination
	Outdoor Explorers	<ul style="list-style-type: none"> <li>Nature experiences</li> <li>Cultural experiences</li> <li>Guided tours</li> </ul>	<ul style="list-style-type: none"> <li>Feel a sense of adventure</li> <li>Have authentic experiences</li> <li>Quality time with others</li> </ul>	<ul style="list-style-type: none"> <li>Unique natural wonders</li> <li>Not too crowded</li> <li>Can view wildlife</li> </ul>
	Culture Seekers	<ul style="list-style-type: none"> <li>Cultural experiences</li> <li>Nature experiences</li> <li>Local cuisine</li> </ul>	<ul style="list-style-type: none"> <li>Connect with new people</li> <li>Have authentic experiences</li> <li>Feel a sense of adventure</li> </ul>	<ul style="list-style-type: none"> <li>Rich cultural heritage</li> <li>Easy to travel to</li> <li>Local festivals and events</li> </ul>
	Refined Globetrotters	<ul style="list-style-type: none"> <li>Nature experiences</li> <li>Guided tours</li> <li>Cultural experiences</li> </ul>	<ul style="list-style-type: none"> <li>Open to new perspectives</li> <li>Have authentic experiences</li> <li>Indulge myself</li> </ul>	<ul style="list-style-type: none"> <li>Unique natural wonders</li> <li>Rich cultural heritage</li> <li>Food and drink experiences</li> </ul>
	Purpose Driven Families	<ul style="list-style-type: none"> <li>Family-focused attractions</li> <li>Nature experiences</li> <li>Local cuisine</li> </ul>	<ul style="list-style-type: none"> <li>Feel a sense of adventure</li> <li>Have authentic experiences</li> <li>Quality time with others</li> </ul>	<ul style="list-style-type: none"> <li>Kid-friendly</li> <li>Can view wildlife</li> <li>Outdoor adventures</li> </ul>
	City Trippers	<ul style="list-style-type: none"> <li>Nature experiences</li> <li>Shopping</li> <li>Cultural experiences</li> </ul>	<ul style="list-style-type: none"> <li>Indulge myself</li> <li>Enjoy and have fun</li> <li>Feel a sense of adventure</li> </ul>	<ul style="list-style-type: none"> <li>Not too expensive</li> <li>Easy to travel to</li> <li>Famous attractions</li> </ul>
	Simplicity Lovers	<ul style="list-style-type: none"> <li>Local cuisine</li> <li>Nature experiences</li> <li>Overnight experiences</li> </ul>	<ul style="list-style-type: none"> <li>Find time to relax</li> <li>Indulge myself</li> <li>Escape everyday life</li> </ul>	<ul style="list-style-type: none"> <li>Easy to travel to</li> <li>Not too crowded</li> <li>Not too expensive</li> </ul>
	Fun & Sun Families	<ul style="list-style-type: none"> <li>Family-focused attractions</li> <li>Guided tours</li> <li>Nature experiences</li> </ul>	<ul style="list-style-type: none"> <li>Indulge myself</li> <li>Escape everyday life</li> <li>Enjoy simple travel</li> </ul>	<ul style="list-style-type: none"> <li>Kid friendly</li> <li>Easy to travel to</li> <li>Not too crowded</li> </ul>

# POTENTIAL TRAVELLER PROFILE: NEW BRUNSWICK – CONTINUED

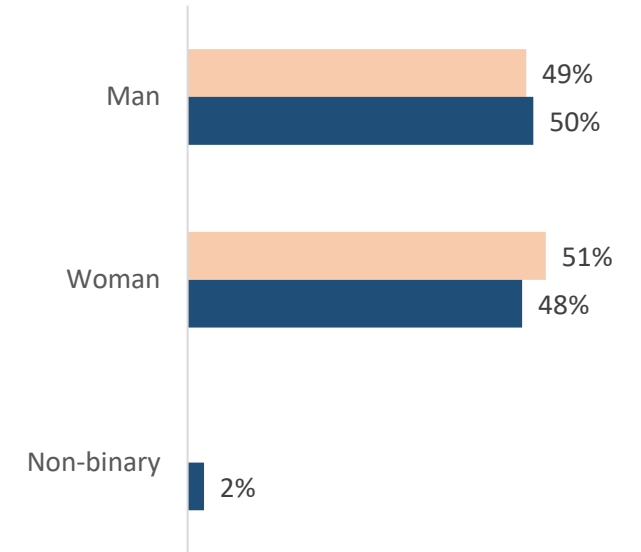
### Ideal Travel Party



### Age

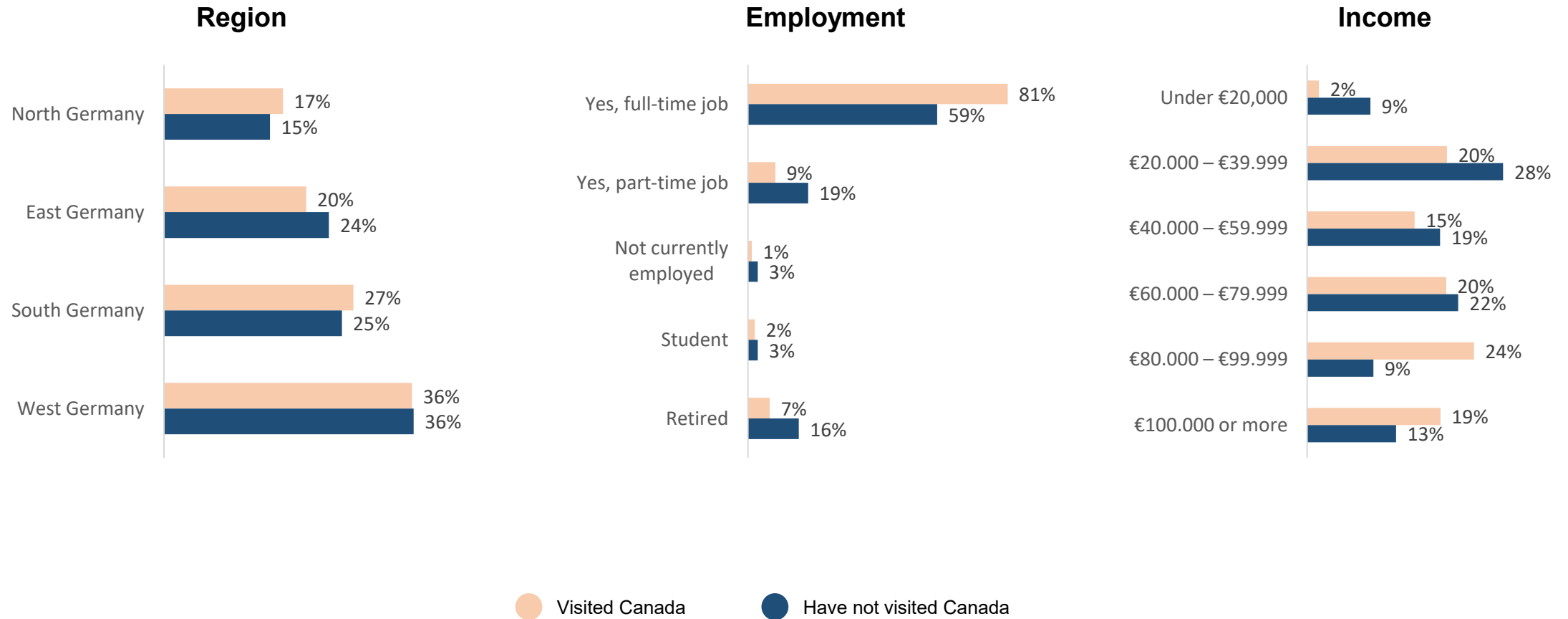


### Gender



● Visited Canada      ● Have not visited Canada

# POTENTIAL TRAVELLER PROFILE: NEW BRUNSWICK – CONTINUED



# POTENTIAL TRAVELLER PROFILE: NEWFOUNDLAND & LABRADOR

## Visited Canada



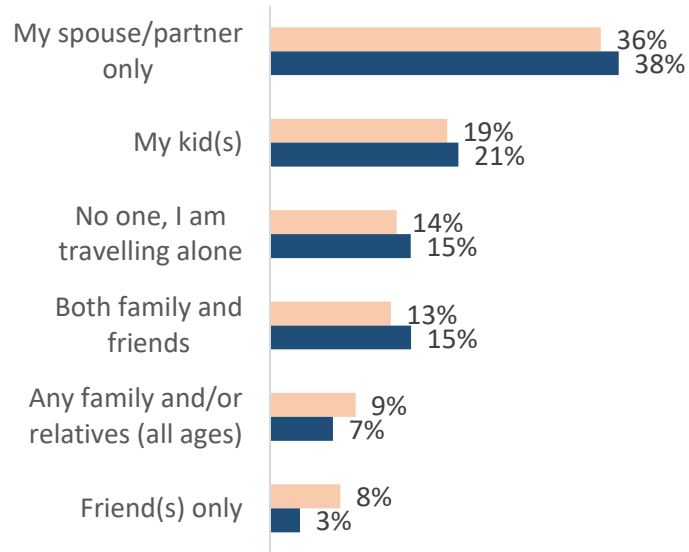
## Have not Visited Canada



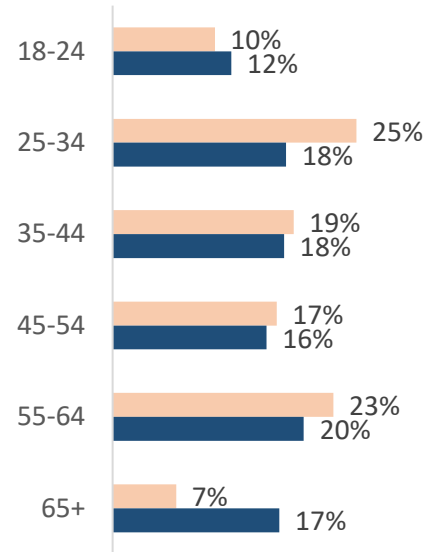
		Top Travel Activities	Travel Motivations	Ideal Destination
	Outdoor Explorers	<ul style="list-style-type: none"> <li>Nature experiences</li> <li>Cultural experiences</li> <li>Guided tours</li> </ul>	<ul style="list-style-type: none"> <li>Feel a sense of adventure</li> <li>Have authentic experiences</li> <li>Open to new perspectives</li> </ul>	<ul style="list-style-type: none"> <li>Unique natural wonders</li> <li>Not too crowded</li> <li>Can view wildlife</li> </ul>
	Culture Seekers	<ul style="list-style-type: none"> <li>Cultural experiences</li> <li>Nature experiences</li> <li>Local cuisine</li> </ul>	<ul style="list-style-type: none"> <li>Connect with new people</li> <li>Open to new perspectives</li> <li>Have authentic experiences</li> </ul>	<ul style="list-style-type: none"> <li>Rich cultural heritage</li> <li>Easy to travel to</li> <li>Local festivals and events</li> </ul>
	Refined Globetrotters	<ul style="list-style-type: none"> <li>Nature experiences</li> <li>Guided tours</li> <li>Cultural experiences</li> </ul>	<ul style="list-style-type: none"> <li>Have authentic experiences</li> <li>Open to new perspectives</li> <li>Indulge myself</li> </ul>	<ul style="list-style-type: none"> <li>Food and drink experiences</li> <li>Unique natural wonders</li> <li>Rich cultural heritage</li> </ul>
	Purpose Driven Families	<ul style="list-style-type: none"> <li>Nature experiences</li> <li>Family-focused attractions</li> <li>Local cuisine</li> </ul>	<ul style="list-style-type: none"> <li>Feel a sense of adventure</li> <li>Have authentic experiences</li> <li>Quality time with others</li> </ul>	<ul style="list-style-type: none"> <li>Kid-friendly</li> <li>Easy to travel to</li> <li>Rich cultural heritage</li> </ul>
	City Trippers	<ul style="list-style-type: none"> <li>Cultural experiences</li> <li>Nature experiences</li> <li>Festivals and events</li> </ul>	<ul style="list-style-type: none"> <li>Indulge myself</li> <li>Escape everyday life</li> <li>Have authentic experiences</li> </ul>	<ul style="list-style-type: none"> <li>Not too expensive</li> <li>Easy to travel around</li> <li>Easy to travel to</li> </ul>
	Simplicity Lovers	<ul style="list-style-type: none"> <li>Nature experiences</li> <li>Local cuisine</li> <li>Cultural experiences</li> </ul>	<ul style="list-style-type: none"> <li>Find time to relax</li> <li>Escape everyday life</li> <li>Enjoy and have fun</li> </ul>	<ul style="list-style-type: none"> <li>Easy to travel to</li> <li>Not too crowded</li> <li>Not too expensive</li> </ul>
	Fun & Sun Families	<ul style="list-style-type: none"> <li>Family-focused attractions</li> <li>Guided tours</li> <li>Local cuisine</li> </ul>	<ul style="list-style-type: none"> <li>Indulge myself</li> <li>Enjoy and have fun</li> <li>Escape everyday life</li> </ul>	<ul style="list-style-type: none"> <li>Kid friendly</li> <li>Not too crowded</li> <li>Easy to travel to</li> </ul>

# POTENTIAL TRAVELLER PROFILE: NEWFOUNDLAND & LABRADOR – CONTINUED

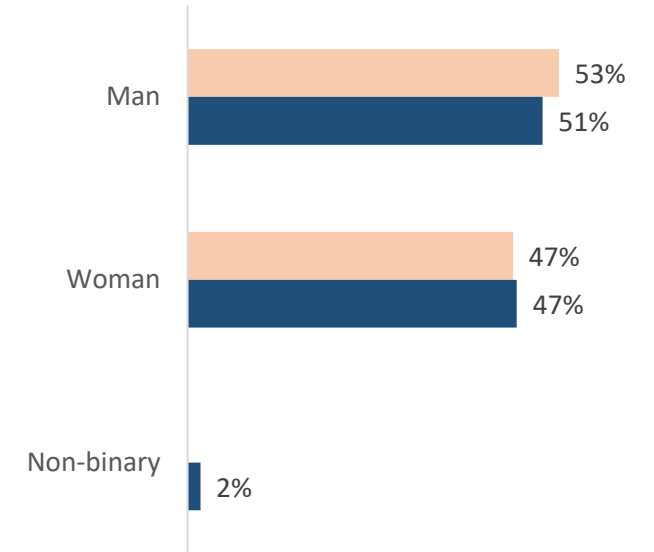
### Ideal Travel Party



### Age

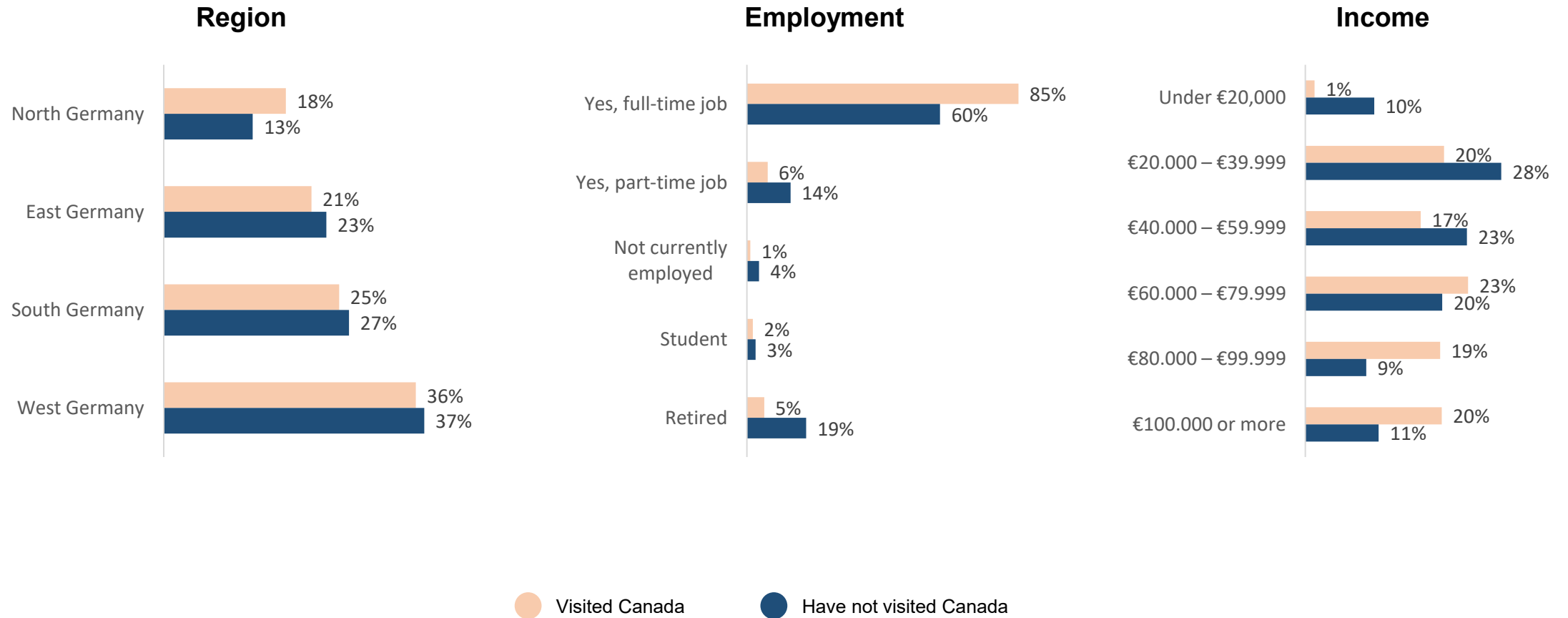


### Gender



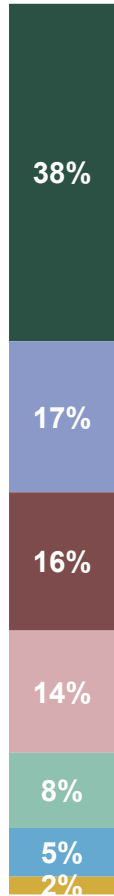
● Visited Canada      ● Have not visited Canada

# POTENTIAL TRAVELLER PROFILE: NEWFOUNDLAND & LABRADOR – CONTINUED

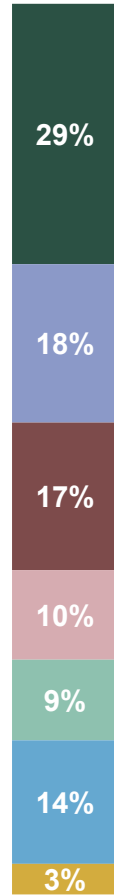


# POTENTIAL TRAVELLER PROFILE: NOVA SCOTIA

## Visited Canada



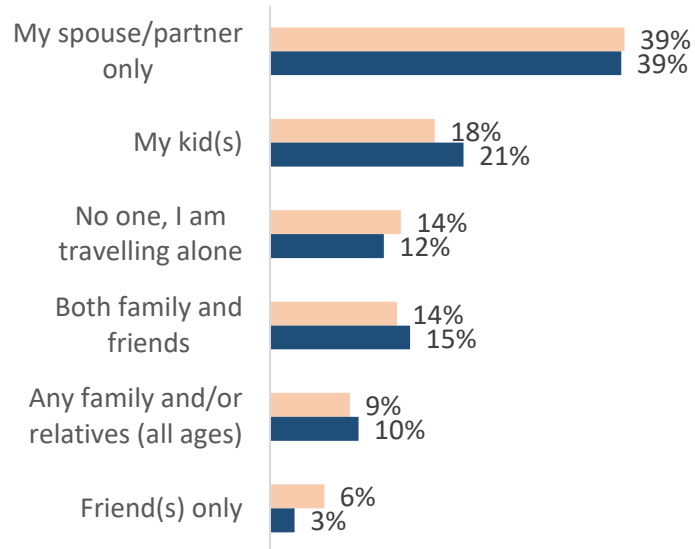
## Have not Visited Canada



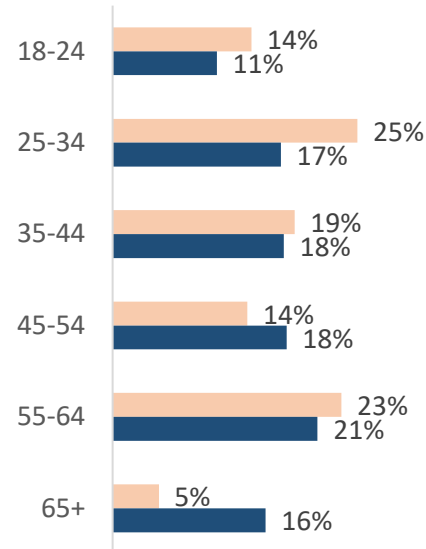
		Top Travel Activities	Travel Motivations	Ideal Destination
	Outdoor Explorers	<ul style="list-style-type: none"> <li>Nature experiences</li> <li>Local cuisine</li> <li>Cultural experiences</li> </ul>	<ul style="list-style-type: none"> <li>Feel a sense of adventure</li> <li>Have authentic experiences</li> <li>Open to new perspectives</li> </ul>	<ul style="list-style-type: none"> <li>Unique natural wonders</li> <li>Can view wildlife</li> <li>Not too crowded</li> </ul>
	Culture Seekers	<ul style="list-style-type: none"> <li>Cultural experiences</li> <li>Nature experiences</li> <li>Local cuisine</li> </ul>	<ul style="list-style-type: none"> <li>Connect with new people</li> <li>Have authentic experiences</li> <li>Open to new perspectives</li> </ul>	<ul style="list-style-type: none"> <li>Rich cultural heritage</li> <li>Easy to travel to</li> <li>Local festivals and events</li> </ul>
	Refined Globetrotters	<ul style="list-style-type: none"> <li>Nature experiences</li> <li>Guided tours</li> <li>Cultural experiences</li> </ul>	<ul style="list-style-type: none"> <li>Have authentic experiences</li> <li>Open to new perspectives</li> <li>Indulge myself</li> </ul>	<ul style="list-style-type: none"> <li>Unique natural wonders</li> <li>Famous attractions</li> <li>Rich cultural heritage</li> </ul>
	Purpose Driven Families	<ul style="list-style-type: none"> <li>Nature experiences</li> <li>Family-focused attractions</li> <li>Local cuisine</li> </ul>	<ul style="list-style-type: none"> <li>Feel a sense of adventure</li> <li>Have authentic experiences</li> <li>Quality time with others</li> </ul>	<ul style="list-style-type: none"> <li>Kid-friendly</li> <li>Not too crowded</li> <li>Easy to travel to</li> </ul>
	City Trippers	<ul style="list-style-type: none"> <li>Nature experiences</li> <li>Shopping</li> <li>Cultural experiences</li> </ul>	<ul style="list-style-type: none"> <li>Indulge myself</li> <li>Enjoy and have fun</li> <li>Quality time with others</li> </ul>	<ul style="list-style-type: none"> <li>Famous attractions</li> <li>Easy to travel to</li> <li>Not too expensive</li> </ul>
	Simplicity Lovers	<ul style="list-style-type: none"> <li>Nature experiences</li> <li>Local cuisine</li> <li>Health and wellness</li> </ul>	<ul style="list-style-type: none"> <li>Indulge myself</li> <li>Escape everyday life</li> <li>Find time to relax</li> </ul>	<ul style="list-style-type: none"> <li>Easy to travel to</li> <li>Not too crowded</li> <li>Not too expensive</li> </ul>
	Fun & Sun Families	<ul style="list-style-type: none"> <li>Family-focused attractions</li> <li>Nature experiences</li> <li>Cultural experiences</li> </ul>	<ul style="list-style-type: none"> <li>Indulge myself</li> <li>Enjoy and have fun</li> <li>Feel a sense of adventure</li> </ul>	<ul style="list-style-type: none"> <li>Kid friendly</li> <li>Easy to travel to</li> <li>Not too expensive</li> </ul>

# POTENTIAL TRAVELLER PROFILE: NOVA SCOTIA – CONTINUED

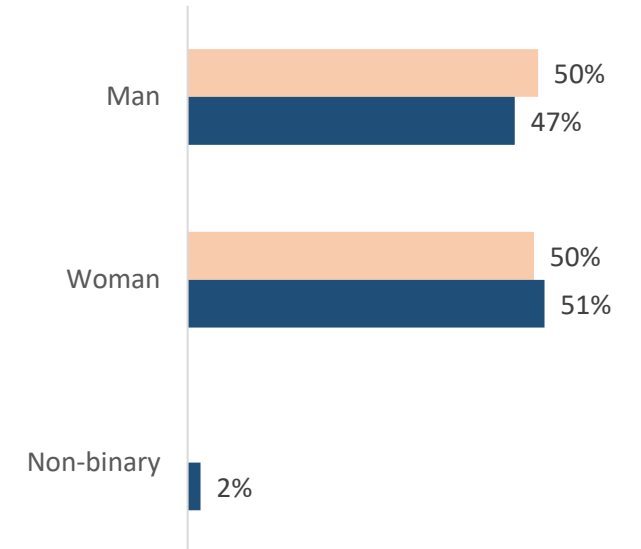
### Ideal Travel Party



### Age

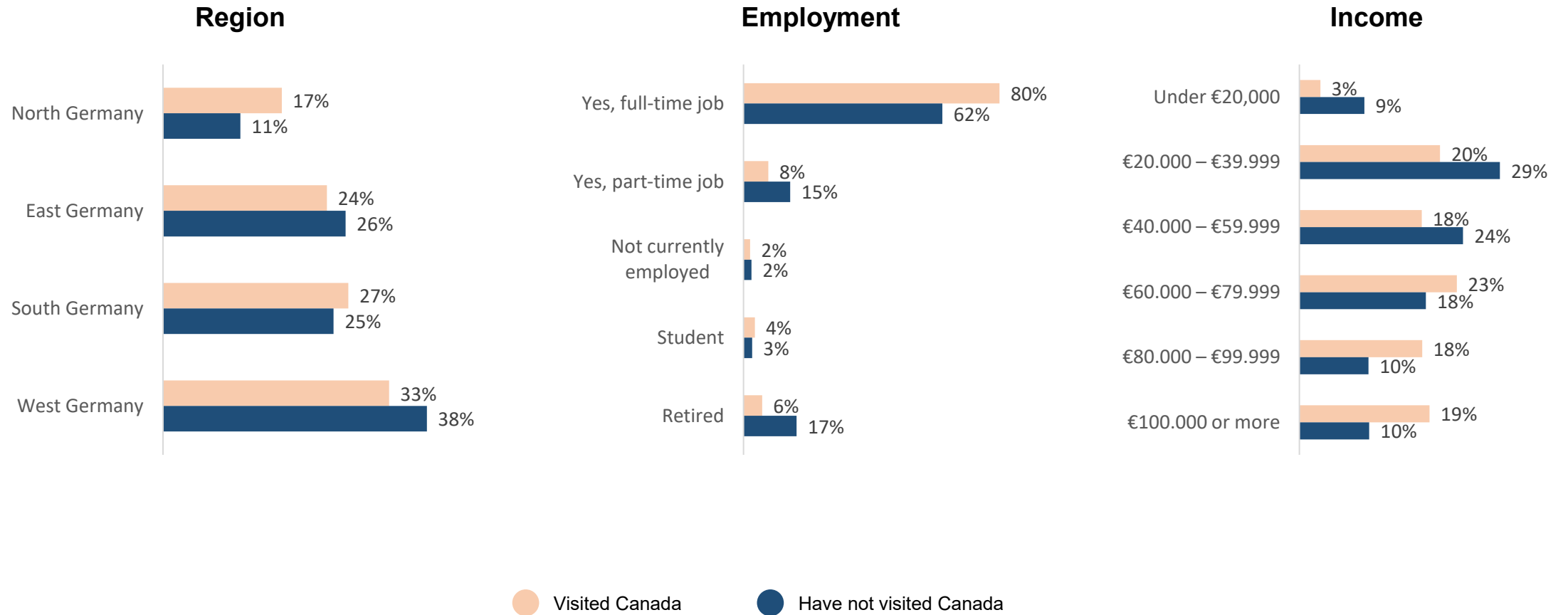


### Gender



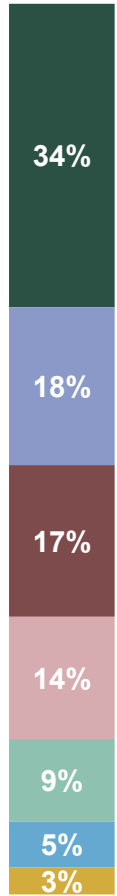
● Visited Canada      ● Have not visited Canada

# POTENTIAL TRAVELLER PROFILE: NOVA SCOTIA – CONTINUED

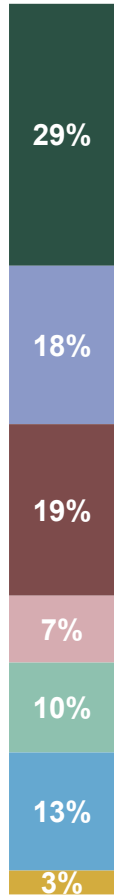


# POTENTIAL TRAVELLER PROFILE: PRINCE EDWARD ISLAND

## Visited Canada



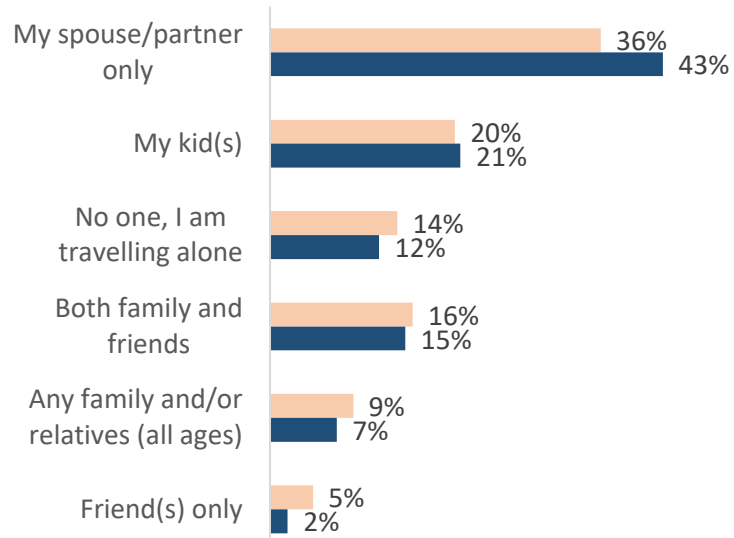
## Have not Visited Canada



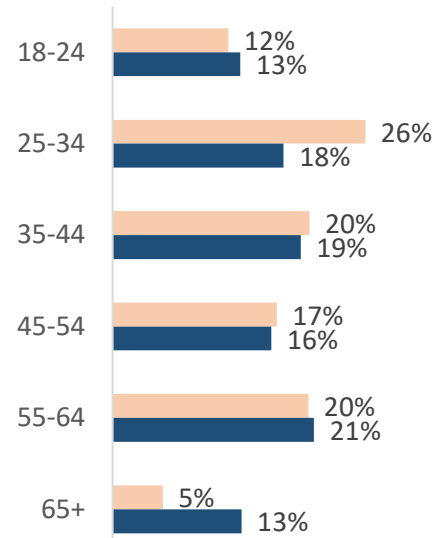
		Top Travel Activities	Travel Motivations	Ideal Destination
	Outdoor Explorers	<ul style="list-style-type: none"> <li>Nature experiences</li> <li>Cultural experiences</li> <li>Guided tours</li> </ul>	<ul style="list-style-type: none"> <li>Feel a sense of adventure</li> <li>Have authentic experiences</li> <li>Quality time with others</li> </ul>	<ul style="list-style-type: none"> <li>Unique natural wonders</li> <li>Can view wildlife</li> <li>Not too crowded</li> </ul>
	Culture Seekers	<ul style="list-style-type: none"> <li>Cultural experiences</li> <li>Nature experiences</li> <li>Local cuisine</li> </ul>	<ul style="list-style-type: none"> <li>Feel a sense of adventure</li> <li>Connect with new people</li> <li>Have authentic experiences</li> </ul>	<ul style="list-style-type: none"> <li>Rich cultural heritage</li> <li>Easy to travel to</li> <li>Local festivals and events</li> </ul>
	Refined Globetrotters	<ul style="list-style-type: none"> <li>Nature experiences</li> <li>Cultural experiences</li> <li>Guided tours</li> </ul>	<ul style="list-style-type: none"> <li>Have authentic experiences</li> <li>Open to new perspectives</li> <li>Indulge myself</li> </ul>	<ul style="list-style-type: none"> <li>Unique natural wonders</li> <li>Food and drink experiences</li> <li>Famous attractions</li> </ul>
	Purpose Driven Families	<ul style="list-style-type: none"> <li>Family-focused attractions</li> <li>Nature experiences</li> <li>Local cuisine</li> </ul>	<ul style="list-style-type: none"> <li>Feel a sense of adventure</li> <li>Have authentic experiences</li> <li>Escape everyday life</li> </ul>	<ul style="list-style-type: none"> <li>Kid-friendly</li> <li>Rich cultural heritage</li> <li>Can view wildlife</li> </ul>
	City Trippers	<ul style="list-style-type: none"> <li>Cultural experiences</li> <li>Festivals and events</li> <li>Nature experiences</li> </ul>	<ul style="list-style-type: none"> <li>Indulge myself</li> <li>Escape everyday life</li> <li>Enjoy and have fun</li> </ul>	<ul style="list-style-type: none"> <li>Not too expensive</li> <li>Famous attractions</li> <li>Food and drink experiences</li> </ul>
	Simplicity Lovers	<ul style="list-style-type: none"> <li>Nature experiences</li> <li>Local cuisine</li> <li>Guided tours</li> </ul>	<ul style="list-style-type: none"> <li>Find time to relax</li> <li>Indulge myself</li> <li>Escape everyday life</li> </ul>	<ul style="list-style-type: none"> <li>Easy to travel to</li> <li>Not too crowded</li> <li>Not too expensive</li> </ul>
	Fun & Sun Families	<ul style="list-style-type: none"> <li>Family-focused attractions</li> <li>Nature experiences</li> <li>Cultural experiences</li> </ul>	<ul style="list-style-type: none"> <li>Enjoy and have fun</li> <li>Quality time with others</li> <li>Indulge myself</li> </ul>	<ul style="list-style-type: none"> <li>Kid friendly</li> <li>Easy to travel to</li> <li>Not too expensive</li> </ul>

# POTENTIAL TRAVELLER PROFILE: PRINCE EDWARD ISLAND – CONTINUED

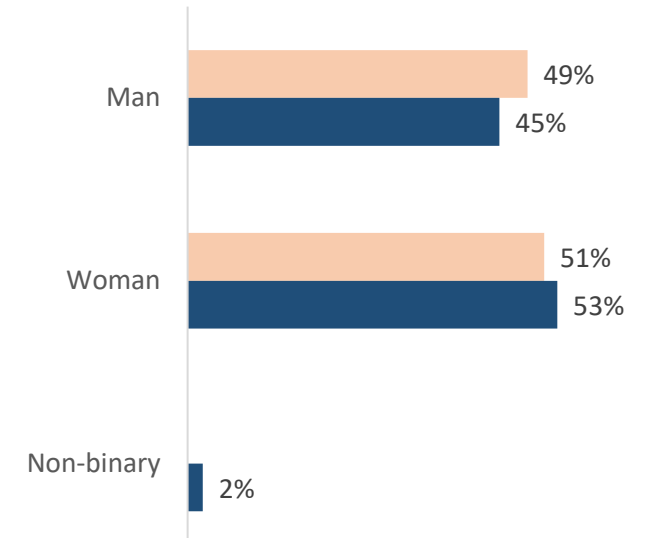
### Ideal Travel Party



### Age



### Gender



● Visited Canada      ● Have not visited Canada

# POTENTIAL TRAVELLER PROFILE: PRINCE EDWARD ISLAND – CONTINUED

