

2021 Global Tourism Watch Highlights Report



Global Tourism Watch



France

Canada



Indigenous Perspectives
Perspectives autochtones



Study Overview: France Market

The target population are residents aged 18 years and older who have taken a long-haul pleasure trip, where they had stayed at least 4 nights with a minimum of 1 night in paid accommodation in the past 3 years, or plan to take such a trip in the next 2 years.



Timing of Fieldwork



2021

Note: this study is conducted annually. Significant differences from the last wave in November 2020 are identified with ▲ / ▼.



Geographical Definition for Qualified Trips

**Outside of: Europe,
North Africa and the
Mediterranean**



GTW Sample Distribution

Sample distribution: **National**

Recent visitors to Canada: **185**

Other travellers: **1,315**

Total sample size: **1,500**

Market Overview

It is important to consider the results in light of the COVID-19 situation at the time of data collection (October 2021).

COVID-19 situation in France

In October 2021, France had various measures in place to combat the spread of COVID-19, including health passes and masking. With high vaccination rates, France was expected to start relaxing some restrictions before the end of the year.¹ The fifth wave, fuelled by the omicron variant that had already taken hold in the UK, did not strike France until November 2021.

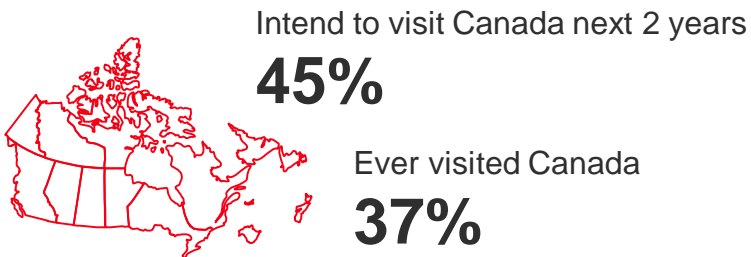
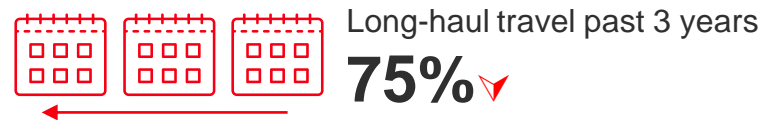
Outbound travel situation

With stable COVID-19 case counts in France, opportunities for travellers to visit international destinations were increasing. Many top competitors were open to fully vaccinated travellers, but required PCR tests on arrival (e.g. South Africa)², while others (e.g. Australia) were closed to visitors.³ The French government used a three-tiered, colour-coded system to classify countries based on COVID-19 risk. Green countries were those assessed to have the lowest disease risk, with orange countries being considered moderate risk, and red being those with the highest risk. While vaccinated travellers could enter restriction-free, non-vaccinated travellers returning from a 'red' list country were required to take a PCR or antigen test within the last 48 hours and quarantine for 10 days. Canada was a green list country in October 2021.⁴

Canada's borders re-opened to non-resident visitors who were fully vaccinated with a Health Canada approved vaccine on September 7, 2021. All visitors still required a pre-entry COVID-19 molecular test, but quarantine requirements were eliminated for vaccinated travellers.⁵

Travel Indicators

France is a mature market with high levels of long-haul travel and future travel intention, including to Canada.



↗ / ↘ Significantly higher/lower than 2020 GTW wave.

¹ The Connexion, September 2021.

² Business Insider South Africa, January 2022.

³ NBC News, October 2021.

⁴ Crisis 24, October 2021.

⁵ Government of Canada, September 2021.

KEY HIGHLIGHTS

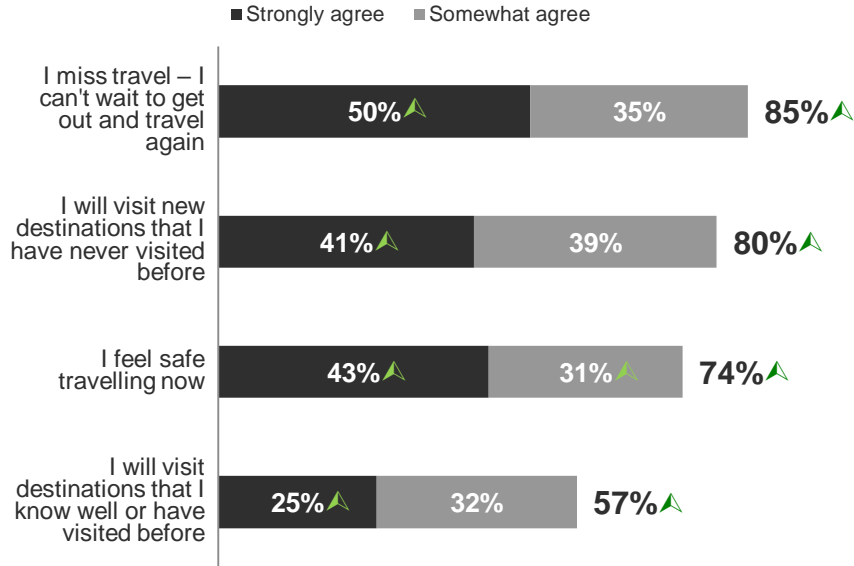
Insight	Implication
<p>French travellers are feeling more optimistic about travel relative to 2020. Significantly more French travellers say they miss travel and feel safe travelling now, and the likelihood to use all forms of transportation has increased.</p>	<p><i>There is an opportunity to capitalize on French travellers renewed zest for travel. Many destinations are competing for the French market, so finding ways to differentiate Canada is important.</i></p>
<p>COVID-19 concerns related to health and safety, medical care, the possibility of being stranded, and caseloads are dropping, but quarantine concerns (both at the destination and upon return to France) persist. Vaccine passport requirements are a fairly important consideration for French travellers.</p>	<p><i>To attract potential visitors and differentiate Canada from competitors, it is important to communicate Canada's entry requirements for fully vaccinated travellers as well as the lack of quarantine requirements. Also, providing details of any vaccine passport requirements will be important.</i></p>
<p>Travel is the top spending priority for the next year. French travellers are planning to spend slightly more on short-haul and long-haul travel post-COVID-19 than they did pre-COVID-19. Long-haul travel is projected to see the greatest percentage growth in spending post-COVID-19. In addition, anticipated spending on long-haul travel is almost double the anticipated spending on short-haul travel.</p>	<p><i>The current prioritization of spending on travel, along with the high anticipated spend on long-haul travel post-COVID-19, presents a strong opportunity for Canada.</i></p>
<p>Interest in outdoor activities, both generally and on a trip to Canada, remains strong and French travellers prefer to avoid crowded destinations. Further, interest in seeing the Northern lights has increased and is now the top activity French travellers would base a trip around. Interest in seeing the Northern lights on a trip to Canada has also increased.</p>	<p><i>Outdoor activities are still a popular draw for French travellers. In addition, unique activities in uncrowded settings such as viewing the Northern lights on a trip to Canada may be a strong lure for French travellers.</i></p>
<p>French travellers consistently rank cost above all other barriers to visiting Canada.</p>	<p><i>French travellers are cost conscious and Canada must find ways to convince prospective visitors that a Canadian vacation offers good value for money. Travel incentives and deals may also help to encourage visitation to Canada.</i></p>
<p>French travellers have a strong preference for visiting new destinations over places they have been before and an increasing barrier among some travellers is that they have been to all of the places they want to visit in in Canada. A decreased interest in visiting Quebec in 2021 may signal that French travellers could be open to exploring other parts of Canada.</p>	<p><i>There is an opportunity to promote new destinations, outside of Quebec, to attract French travellers.</i></p>
<p>Late spring is more popular than the peak summer months for French travellers considering a visit to Canada. Additionally, many vacation activities are equally or more popular in the spring compared to the summer. Historical visitation during the spring is lower than summer months, which suggests there is potential to disperse French visitation into this shoulder season.</p>	<p><i>There is an opportunity to disperse French visitation into the shoulder season by promoting activities that are popular in the spring.</i></p>
<p>Travel agents and tour operators play a substantial role in supporting travel from France to Canada. The majority of potential French visitors indicate that they are likely to use a travel agent to research or book a trip to Canada.</p>	<p><i>Building and maintaining relationships with the French travel trade is important to boosting visitation to Canada.</i></p>

COVID-19 Considerations

Attitudes Toward Travel and Transportation Modes

- ▶ Significantly more French travellers are eager to return to travel (85%, up significantly from 78% in 2020). They are also more likely to feel safe travelling now (74%, up from 29%). However, older travellers (55+ years) remain more cautious. As comfort levels increase, French travellers have a strong preference for visiting new destinations over familiar ones, but older travellers (55+ years) are less interested in new destinations.
- ▶ As COVID-19 restrictions ease, French travellers are also growing more comfortable with using all forms of transportation, including flying internationally (70%, up from 56% in 2020).

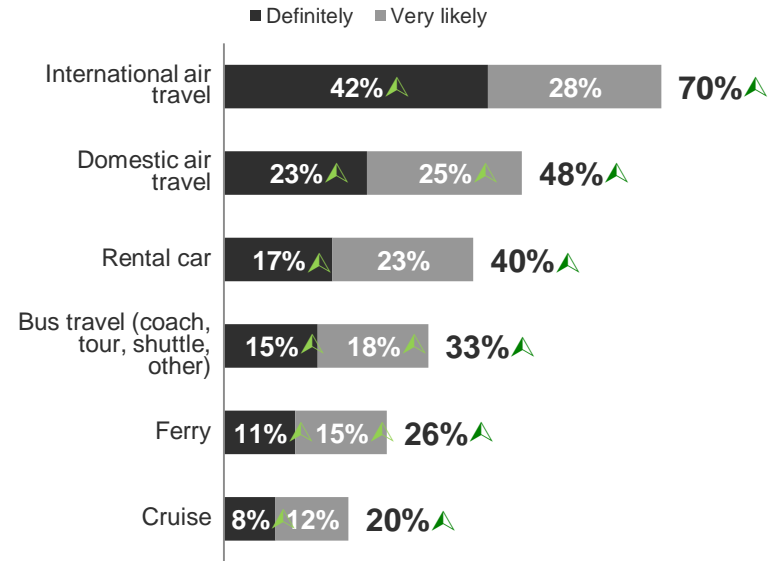
Attitudes Toward Travel



▲ / ▼ Significantly higher/lower than 2020 GTW wave.

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1500) COV13. Thinking of your next holiday, as government restrictions allow, how much do you agree or disagree with the following statements?

Transportation Modes

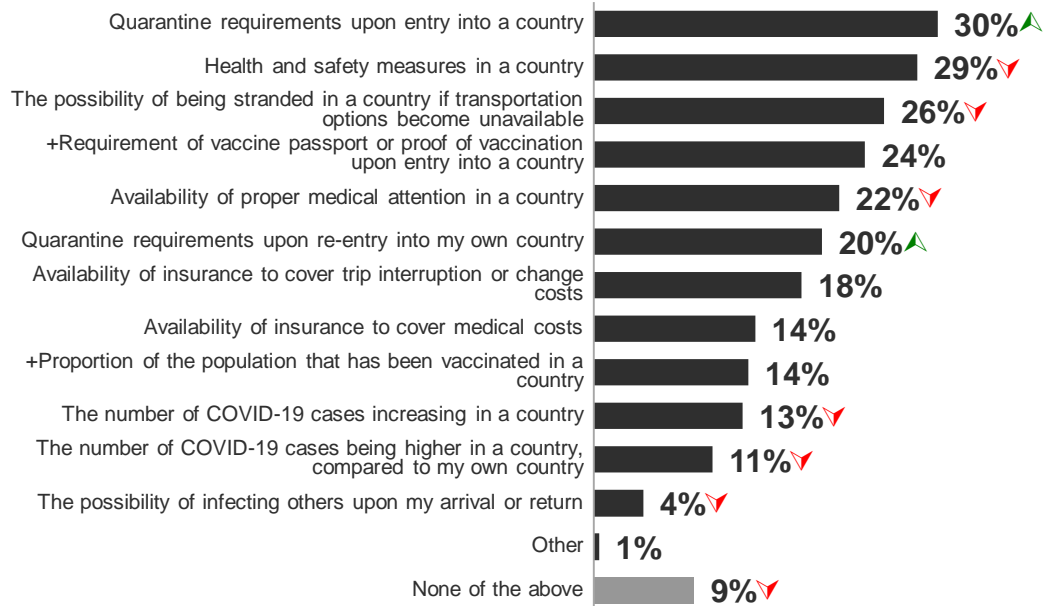


▲ / ▼ Significantly higher/lower than 2020 GTW wave.

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1500) COV16. As government restrictions allow, how likely are you to use the following modes of transportation?

Most Important Considerations in Selecting Travel Destination

- ▶ When selecting a destination, concerns related to health and safety, the possibility of being stranded, medical care, and COVID-19 caseloads are dropping. Proof of vaccination/vaccine passports requirements are relatively high on French travellers' list of considerations when selecting a travel destination.
- ▶ Concerns about quarantine requirements at a destination and upon re-entry to France are growing concerns. In October 2021, there were no quarantine requirements for vaccinated travellers to enter Canada or upon return to France.



▲ / ▼ Significantly higher/lower than 2020 GTW wave.

+ New statement in 2021 GTW – no trending.

Base: Long-haul pleasure travelers (past 3 years or next 2 years) (n=1500)

NEWQ3. When thinking about taking a holiday trip outside of your country, which of the following are the most important considerations in selecting your travel destination? (Select up to 3 options)

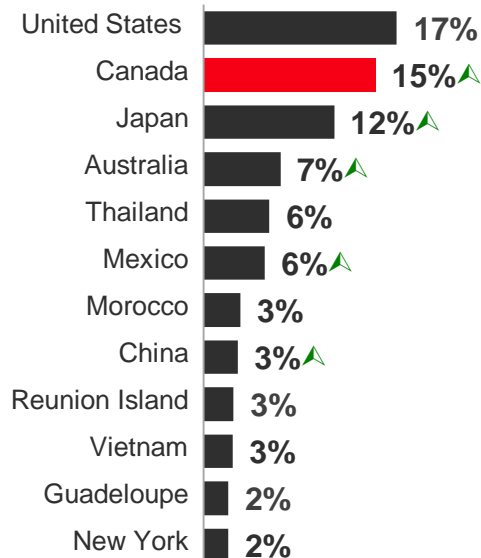
Key Performance Indicators

Unaided Long-Haul Destination Consideration (Next 2 Years)

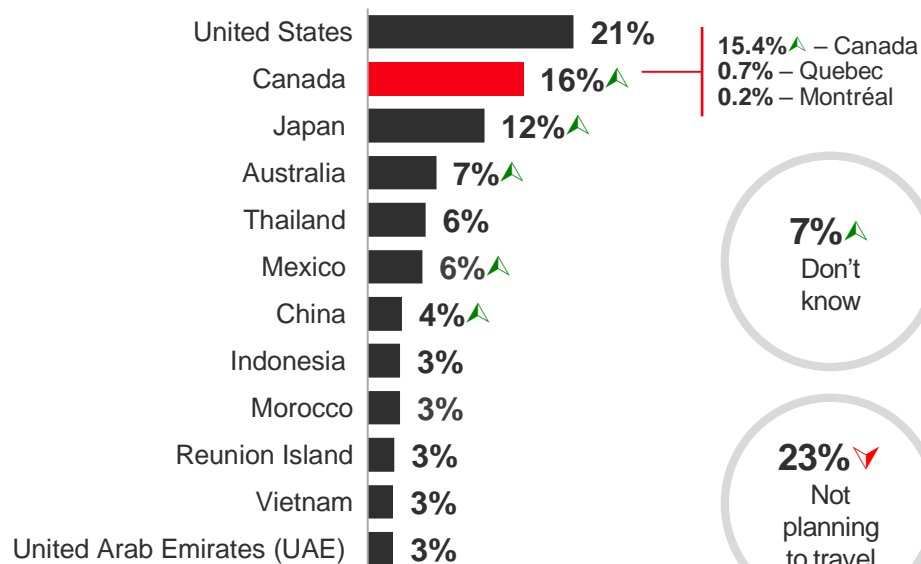
Unaided consideration represents the top-of-mind presence of destinations in the consumer mindset and requires travellers to think of destinations without being prompted.

- ▶ Canada is the #2 top-of-mind country that French travellers are considering visiting in the next 2 years, with 16% of mentions (up significantly from 13% in 2020). Canada is ahead of #3 ranked Japan, which is also up significantly from 2020. Mentions of the United States – the top performer in this market – are stable.

Top 12 Destination Brands¹



Top 12 Destination Countries²



▲ / ▼ Significantly higher/lower than 2020 GTW wave.

¹ Responses as mentioned by respondents (e.g., percentage who said "Canada" specifically).

² Roll-up of brand mentions by country (e.g., percentage who said "Canada" or any destination in Canada).

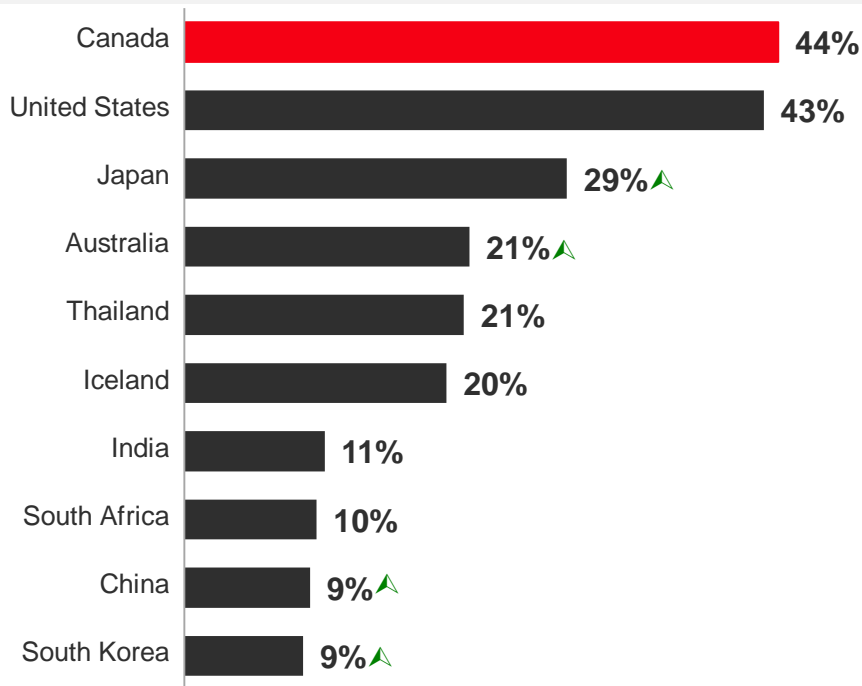
Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1500)

S8. You mentioned that you are likely to take a long-haul holiday trip outside of Europe, North Africa and the Mediterranean in the next 2 years. Which destinations are you seriously considering? (Please list up to 3 destinations)

Aided Destination Consideration (Next 2 Years)

Aided consideration represents the proportion of travellers who say they would seriously consider visiting a destination, when prompted with a list of potential destinations. For these travellers, Canada may not be top-of-mind as a destination, but they are considering a visit in the next 2 years.

- ▶ Canada continues to rank 1st on aided consideration, but the gap with the United States is narrowing. Japan and Australia both saw significant gains in 2021, but trail Canada and the United States by a substantial margin.



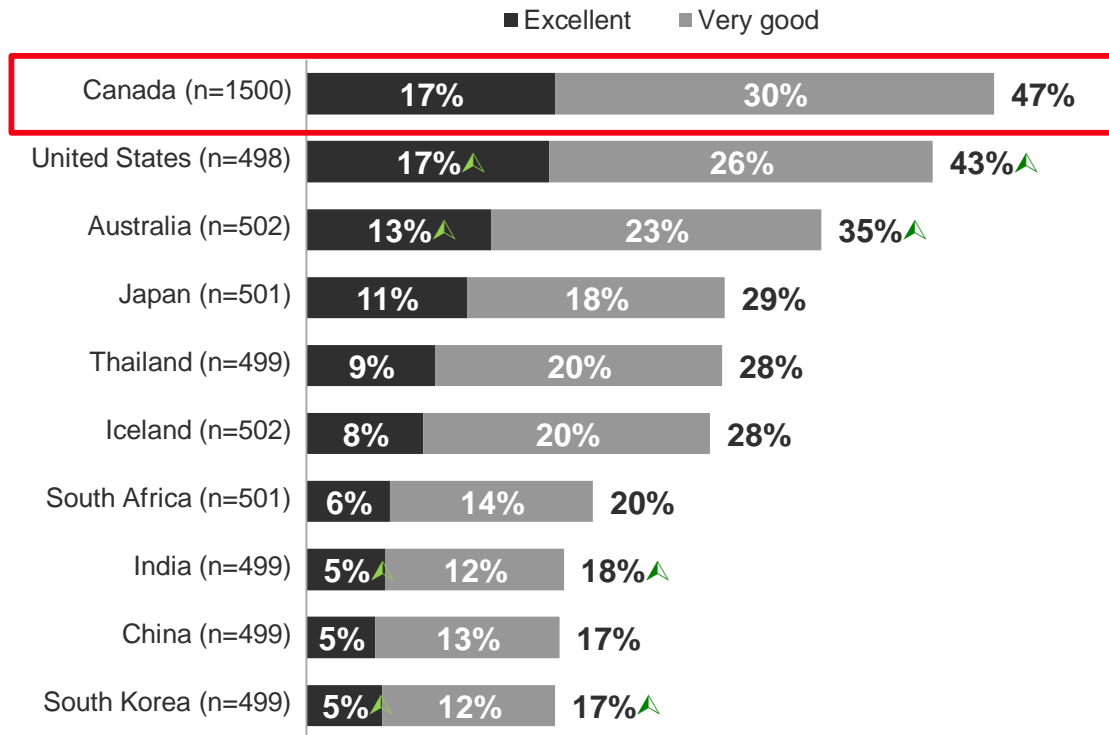
▲ / ▼ Significantly higher/lower than 2020 GTW wave.

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1500)

BVC1. You may have already mentioned this before, but which destinations would you seriously consider visiting in the next 2 years? (Select all that apply)

Knowledge of Holiday Opportunities

- ▶ Canada ranks first on destination knowledge among long-haul competitors. The United States recorded a significant jump on this metric in 2021 and is closing in on Canada. Australia also saw significant improvement and has firm command of 3rd place.



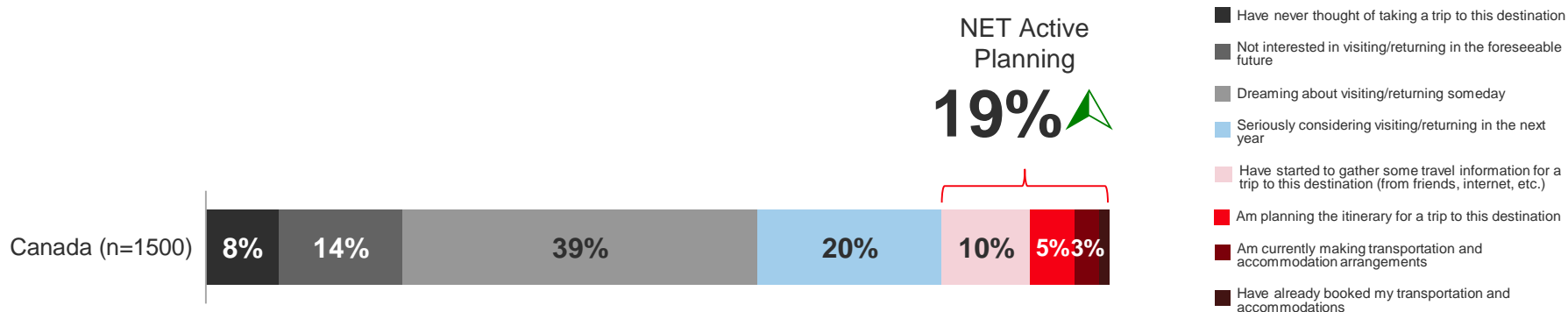
▲ / ▼ Significantly higher/lower than 2020 GTW wave.

Base: Long-haul pleasure travellers (past 3 years or next 2 years) evaluating each destination MP3. How would you rate your level of knowledge of holiday opportunities in each of the following destinations?

Stage in the Purchase Cycle by Market

There is a purchasing or decision-making cycle associated with long-haul travel; consumers move through progressive stages from not knowing anything about a destination to booking a trip. **NET Active Planning** represents the final four stages, or lower funnel, of this path-to-purchase cycle.

- ▶ Between 9% and 20% of French travellers are in the lower funnel stages of the purchase cycle for Canada's top competitor long-haul destinations. Canada is ranked 2nd overall, with 19% of French travellers in the NET active planning stages for a trip to Canada, up significantly from 16% in 2020. Canada is 2nd to the United States, which also recorded significantly improved results in 2021.

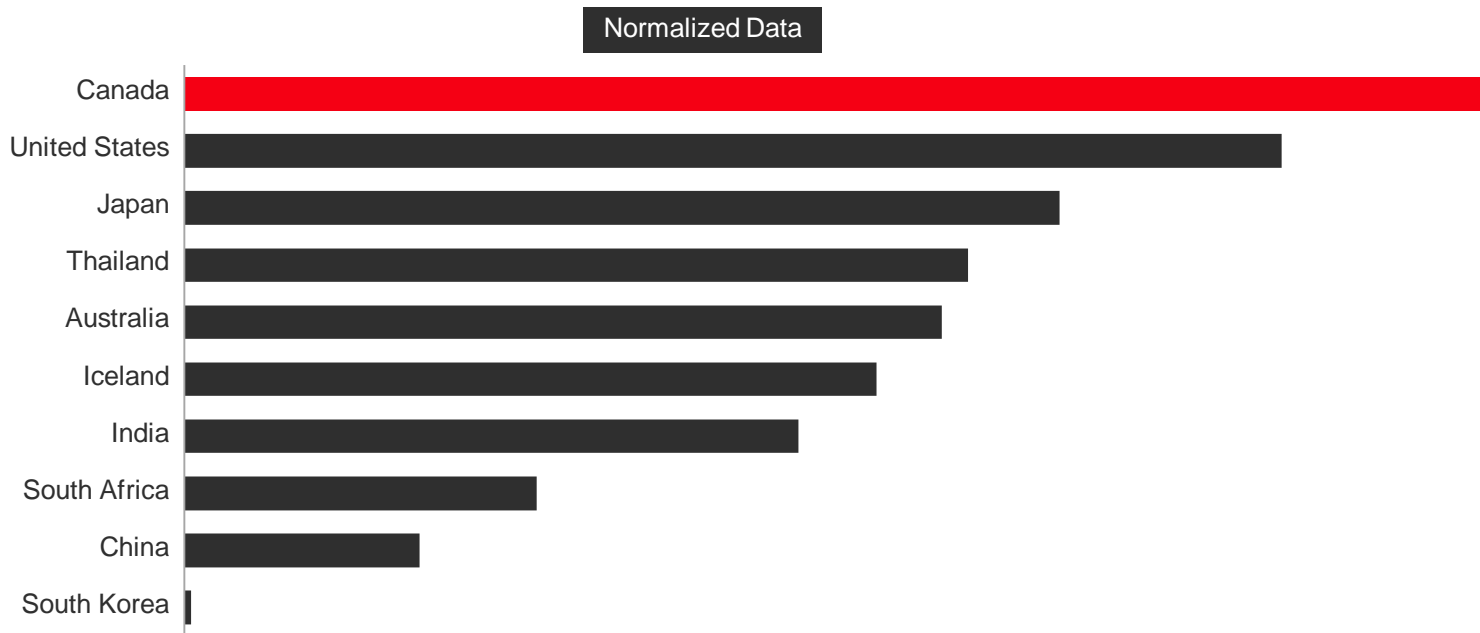


▲ / ▼ Significantly higher/lower than 2020 GTW wave.

NET Promoter Score (NPS)

The Net Promoter Score (NPS) measures the likelihood of travellers to recommend a destination. It is an important measure for advocacy, since a high NPS score suggests that those who have visited Canada are more likely to encourage others to visit. Results are gathered among travellers who have ever visited each destination and data has been normalized to indicate relative NPS scores across all competitors.

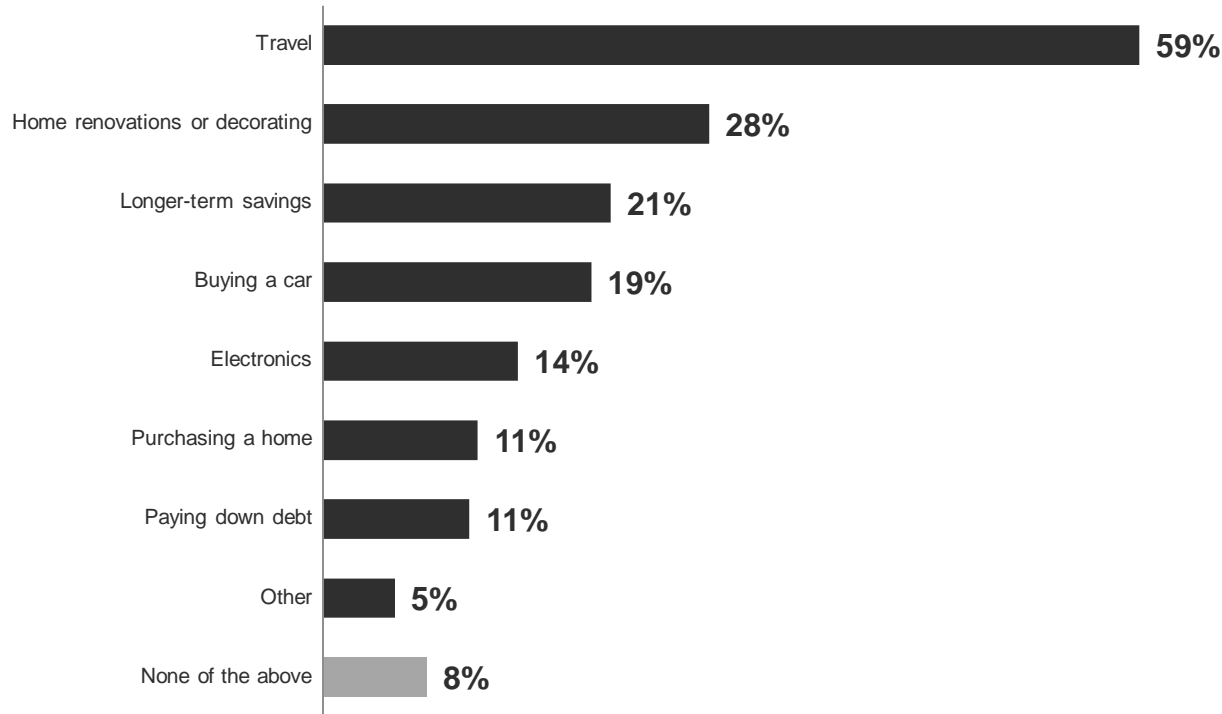
- ▶ Canada remains 1st overall, unchanged from 2020.



Travel Spending and Canada Market Intent

Spending Priorities for the Next Year⁺

► Travel is the top immediate spending priority for French travellers in 2021, far ahead of secondary priorities such as home renovations and savings.



⁺ New question in 2021 GTW – no trending.

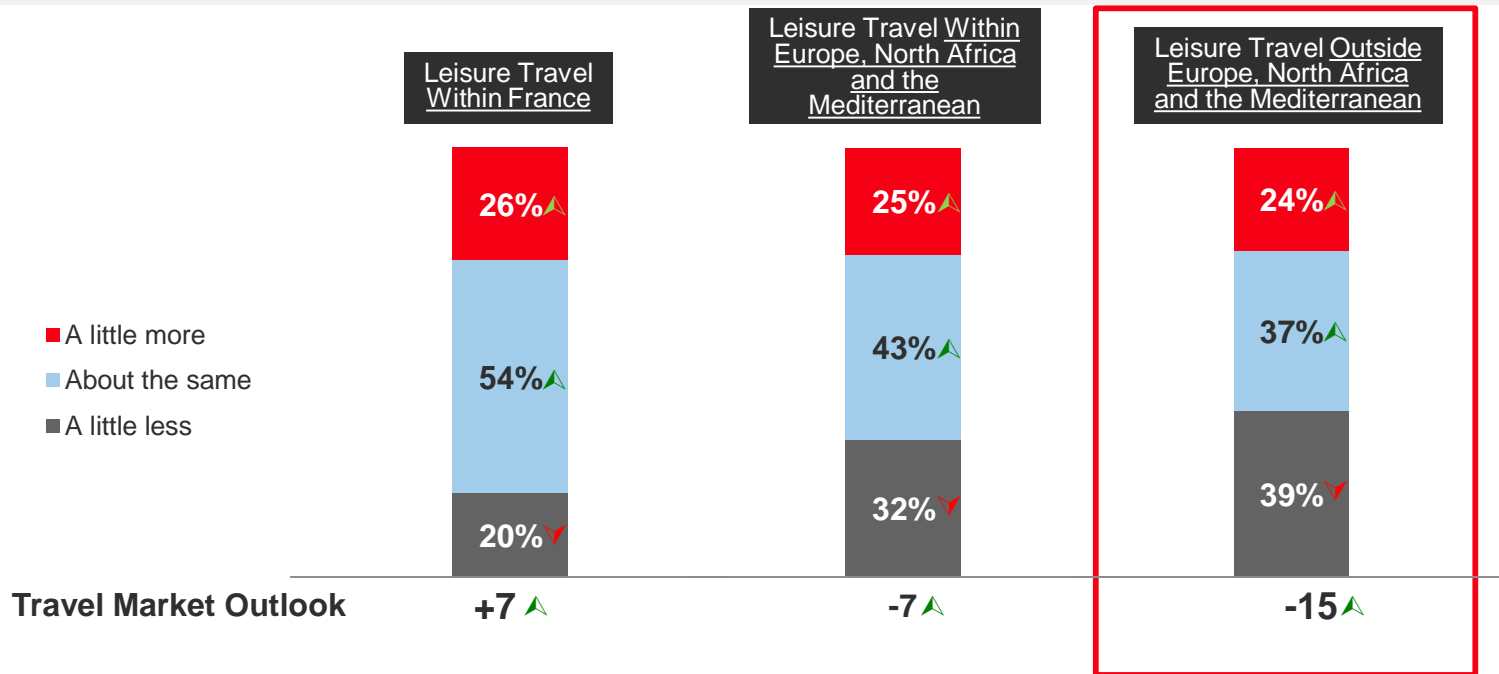
Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1500)

AT. In the next 12 months, which of following will you prioritize spending money on? (Select up to 3 options)

Travel Spending Intentions (in Next 12 Months)

Travel Market Outlook is the difference between the proportion who say they will spend more on travel in the next 12 months than they did in the last 12 months, minus the proportion who say will spend less on travel in the next 12 months.

- ▶ French travellers foresee spending more on all types of travel in the next year than they did in the past year. The short-haul travel outlook is most improved (-33 in 2020 vs -7 in 2021).
- ▶ While the long-haul travel outlook is still negative, it is significantly improved from 2020 (-36) and is in line with 2019 (-16).



▲ / ▼ Significantly higher/lower than 2020 GTW wave.

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1500)

S2. How would you describe your spending intentions on the following items in the next 12 months compared to the last 12 months? Will you spend ...?

Travel Spending+

- ▶ French travellers anticipate spending slightly more on travel post-COVID-19 than they did pre-COVID-19 on both short-haul and long-haul travel.
- ▶ Long-haul travel is projected to see the greatest percentage growth in spending post-COVID-19. In addition, anticipated spending on long-haul travel (\$5,197) is almost double the anticipated spending on short-haul travel (\$2,715).

Mean Annual Household Spend on Vacation Trips

	PRE-COVID	POST-COVID	NET CHANGE POST-COVID MINUS PRE-COVID	
Travelling within France	\$1882	\$1855	-\$27	(-1%)
Travelling within Europe, North Africa and the Mediterranean	\$2663	\$2715	+\$52	(+2%)
Travelling outside Europe, North Africa and the Mediterranean	\$4981	\$5197	+\$216	(+4%)

* New questions in 2021 GTW – no trending.

Base: Long-haul pleasure travellers who travelled in 2019 (n=660 Domestic / n=559 Short-haul / n=447 Long-haul)

TP2_INT. Thinking about the holiday trips you took in 2019, approximately how much did your immediate household spend in total on trips to each destination? A rough estimate is fine but if you cannot remember please select don't know. (PRE-COVID)

Base: Long-haul pleasure travellers who expect to travel post COVID-19 (n=625 Domestic / n=565 Short-haul / n=537 Long-haul)

TP2B_INT. Thinking about the vacation trips you plan to take when COVID-19 is no longer a consideration, approximately how much does your immediate household intend to spend in total on trips to each destination? A rough estimate is fine but if it's too hard to predict please select don't know. (POST-COVID)

Likelihood of Visiting Canada in Next 2 Years

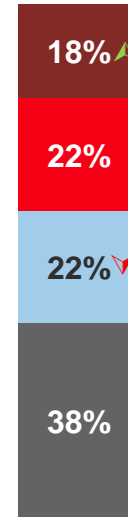
- ▶ Among all French travellers, the likelihood of visiting Canada in the next two years is up significantly from 2020.
- ▶ Intent to visit Canada in the next two years is highest among those aged 18-34 and lowest among those aged 55+.
- ▶ French travellers are much more likely to be considering a trip to Canada of 4+ nights than a trip of 1-3 nights.

Likelihood of Taking a Trip of:

1 to 3 nights

4+ nights

- Definitely
- Very likely
- Somewhat likely
- Not interested



45% ↑
Likely
(definitely/very likely) to visit
Canada in next
2 years

↑ / ↓ Significantly higher/lower than 2020 GTW wave.

Note: Not interested is comprised of those saying not very likely, not at all likely, or indicating no intention to visit Canada.

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1500)

MP6. Realistically, how likely are you to take a holiday trip to Canada in the next 2 years?

Potential Market Size For Canada

Study data is used to estimate the size of the potential market for Canada in two ways – the target market (proportion of all French travellers in the dream to purchase stages of the purchase cycle for Canada) and the immediate potential market (intention among the target market to visit in the next two years).

- ▶ The proportion of French travellers considering Canada remained stable in 2021, but within that group the intention to visit in the next two years increased significantly, resulting in an immediate potential market size of 6.2 million.

Size of the Potential Market to Canada (Next 2 Years)

Total potential long-haul pleasure travellers aged 18 years or more



Target Market for Canada

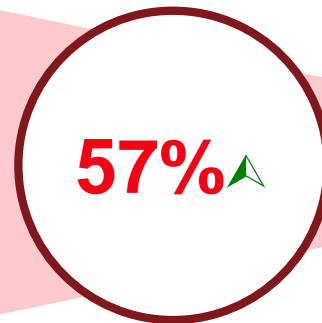


Those in the dream to purchase stages of the path to purchase for Canada

Size of the target market



Immediate Potential for Canada



Will definitely/very likely visit Canada in the next 2 years¹

Immediate potential



▲ / ▼ Significantly higher/lower than 2020 GTW wave.

¹ Includes respondents likely to visit Canada for a trip of 1 to 3 nights, or a trip of 4 nights or more.

Base: Target market for Canada = long-haul pleasure travellers (past 3 years or next 2 years) (n=1500); Immediate potential for Canada = dream to purchase stages for P2P for Canada (n=1190)

MP1. Which of the following best describes your current situation when thinking about each of the following destinations for a holiday trip?

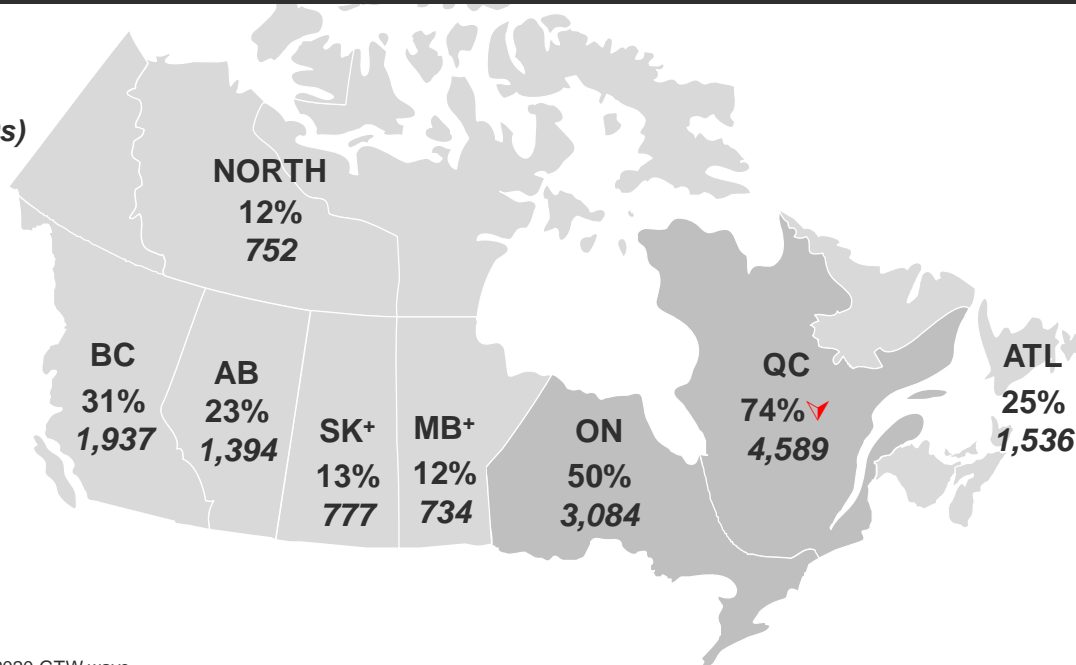
MP6. Realistically, how likely are you to take a holiday trip to Canada in the next 2 years?

Potential Market Size for the Regions

- ▶ Quebec, perennially the favourite destination of French travellers, experienced a significant drop in interest levels. Despite the decline, Quebec stands to attract the largest share of French travellers followed by Ontario.

Immediate Potential for Canada: **6,167,500**

Key:
% likely to visit region
Immediate potential (000s)



▲ / ▼ Significantly higher/lower than 2020 GTW wave.

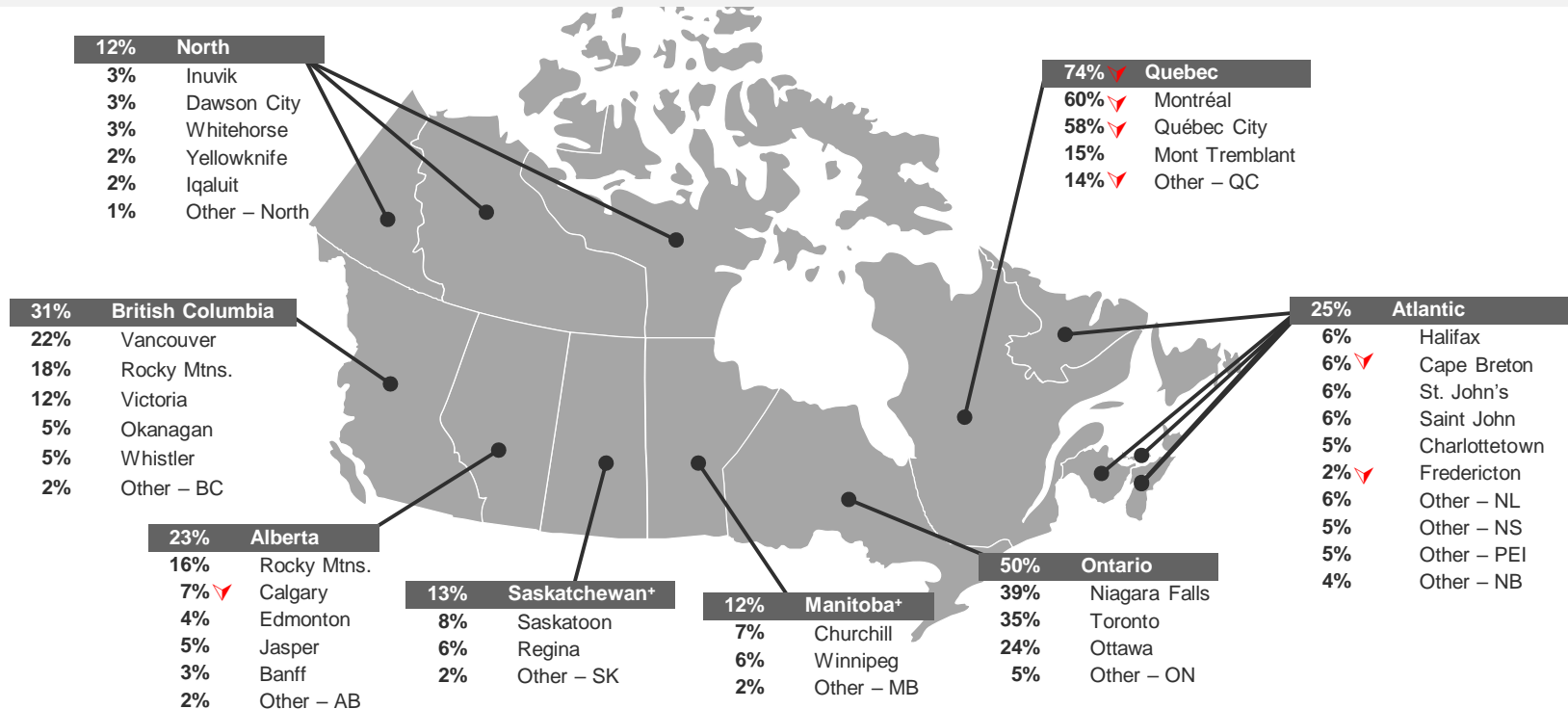
+ Saskatchewan and Manitoba were combined in 2020 GTW wave – no trending.

Base: Those in the dream to purchase stages of the path to purchase for Canada and definitely/very likely to take a trip to Canada (n=686)

MP7. If you were to take a holiday trip to Canada in the next 2 years, which of the following Canadian travel destinations are you likely to visit? (Select all that apply)

Canadian Destinations Likely to Visit

- Coupled with declining interest in visiting Quebec, French travellers indicated significantly lower interest to visit Montréal and Québec City. In Atlantic Canada, Cape Breton and Fredericton recorded declines, and interest in Calgary also waned.



▲ / ▼ Significantly higher/lower than 2020 GTW wave.

* Saskatchewan and Manitoba were combined in 2020 GTW wave – no trending.

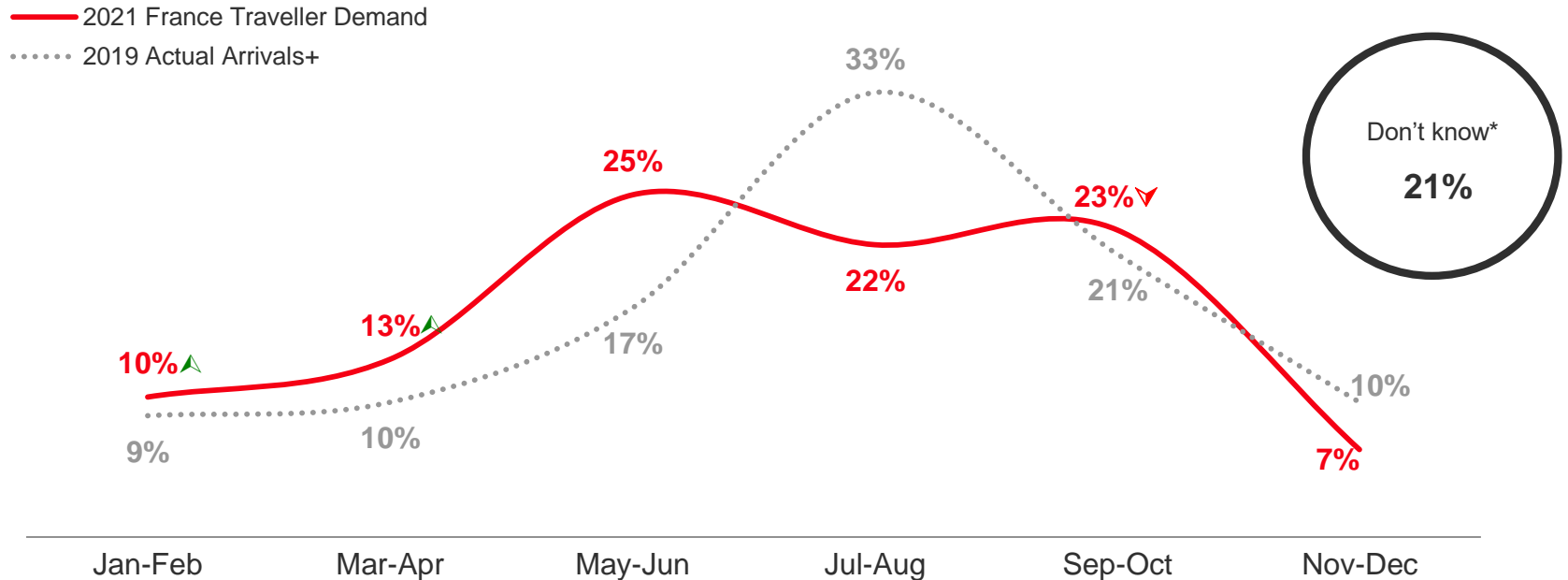
Base: Those in the dream to purchase stages of the path to purchase for Canada and definitely/very likely to take a trip to Canada (n=686)

MP7. If you were to take a vacation trip to Canada in the next 2 years, which of the following Canadian travel destinations are you likely to visit? (Select all that apply)

MP7a-i. Within [province/region], which travel destinations are you likely to visit? (Select all that apply)

France Seasonal Demand for Canada

- ▶ May and June are the most popular months for French travellers considering a visit to Canada, but historically July and August are the peak months for visitor arrivals from France.
- ▶ There is potential to disperse French visitation into late spring as well as January-February and March-April, both up significantly since 2020, given that demand outpaces historical visitation during these months.



+ Source: 2019 Statistics Canada Frontier Border Counts.
* 'Don't know' responses excluded from seasonal demand chart.

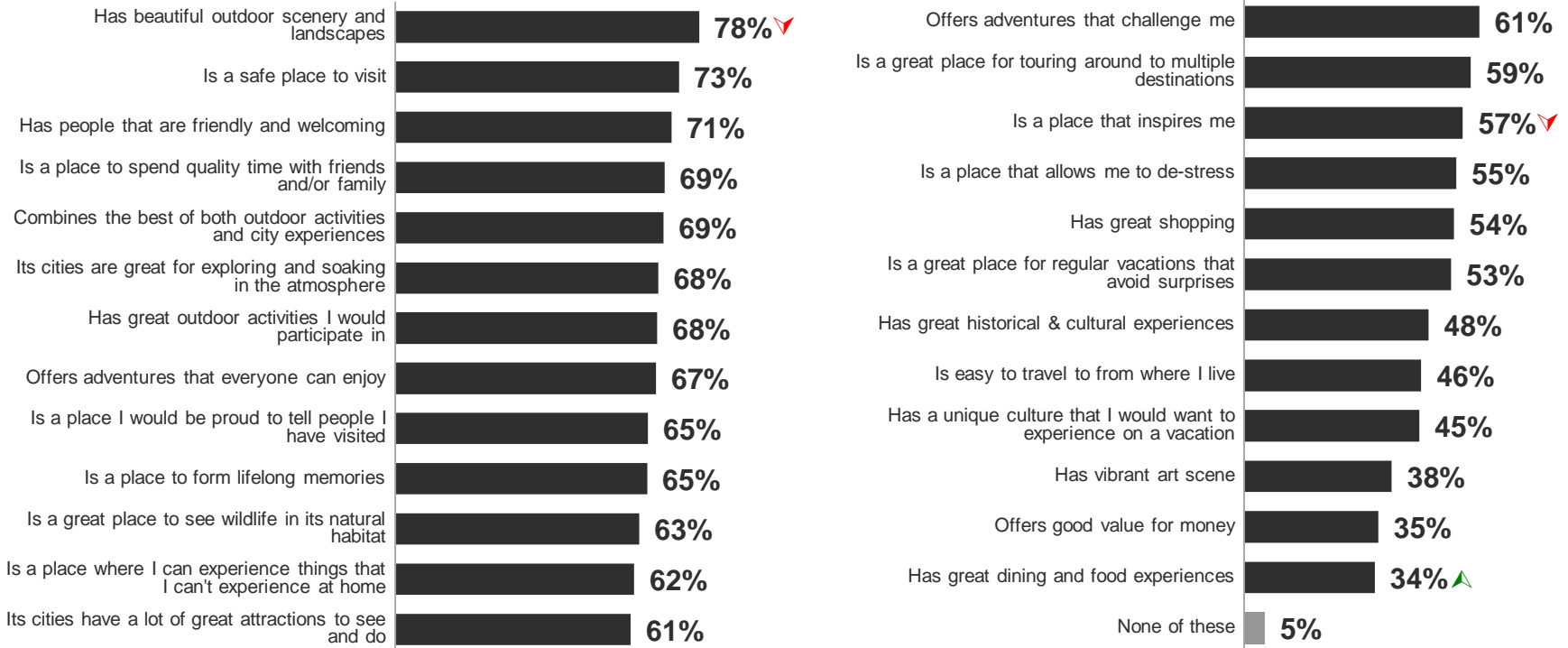
▲ / ▼ Significantly higher/lower than 2020 GTW wave.

Base: Those in the dream to purchase stages of the path to purchase for Canada, excluding 'Don't know' (n=945)
PC3. What time of year would you consider taking a holiday trip to Canada in the next 2 years? (Select all that apply)

Impressions of Canada

Impressions of Canada as a Holiday Destination

- Canada is best known among French travellers for beautiful scenery and landscapes, being a safe destination, and having friendly & welcoming people. However, the proportion of French travellers associating Canada with beautiful scenery and landscapes declined significantly in 2021. While not known for great dining and food experiences, more French travellers associated Canada with this attribute in 2021.



▲ / ▼ Significantly higher/lower than 2020 GTW wave.

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1500)

MP5_NEW. We are interested in your general impressions about destinations, even if you have never been there. Please select all the destination you think apply to the statement. Select None of these if you think none of the destinations apply.

Key Barriers for Visiting Canada

- ▶ Similar to 2020, cost concerns stand out as the top deterrent for potential French travellers to visit Canada in 2021. As COVID-19 vaccines became more globally available in 2021, health risks and safety concerns have declined in importance. Although a small proportion, concerns about having been to all the places they want to visit in Canada is up significantly, with young travellers (18-34 years) most likely to feel this way.
- ▶ More French travellers say nothing would prevent them from visiting Canada, with older travellers (55+ years) being most likely to share this sentiment.



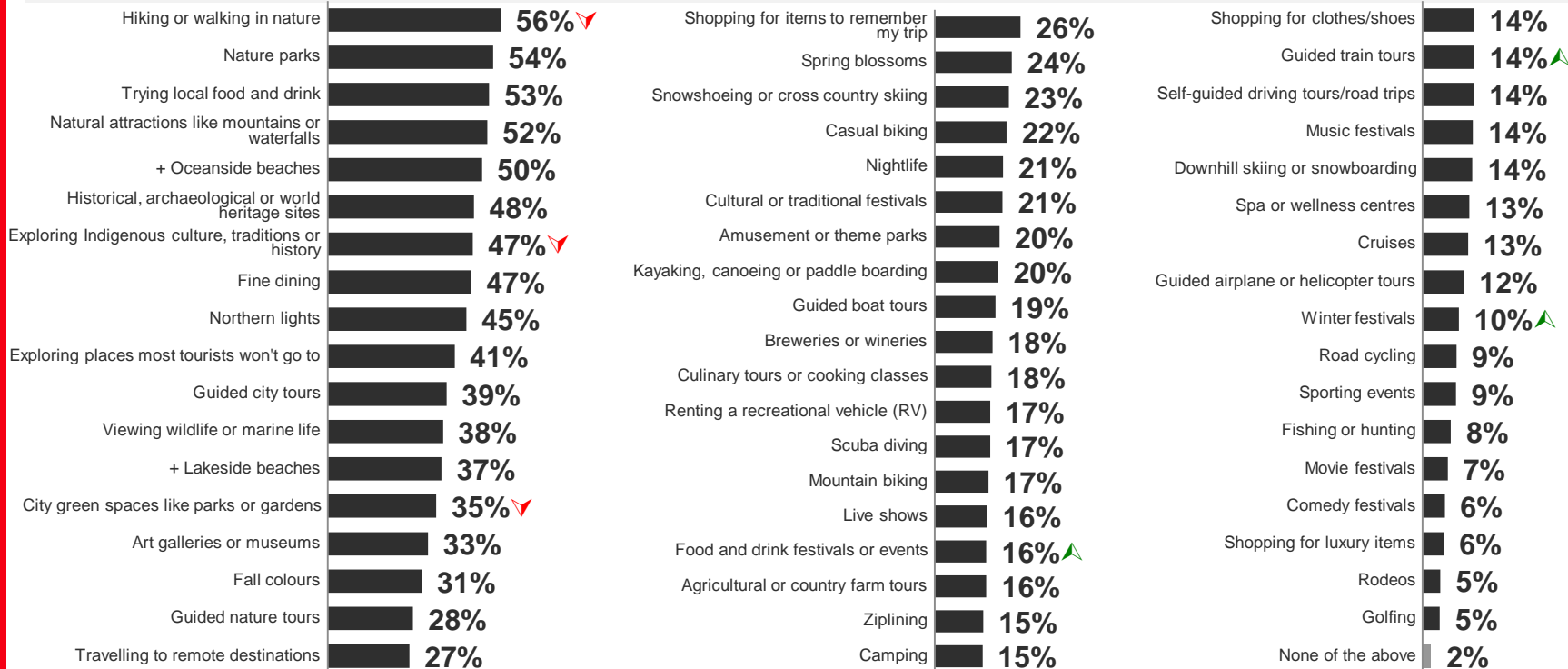
▲ / ▼ Significantly higher/lower than 2020 GTW wave.

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1500)
MP9. Which of the following factors might discourage you from visiting Canada? (Select all that apply)

Vacation Interests

Activities Interested in While on Holiday

- ▶ French travellers have a strong preference for nature-based activities, although interest in hiking/walking in nature, the top-ranked activity, dropped significantly.
- ▶ Interest in experiencing Indigenous culture and city parks has also decreased compared to 2020, but interest in some niche activities such as food and drink festivals, guided train tours, and winter festivals are on the rise.



+ New statement in 2021 GTW – no trending.

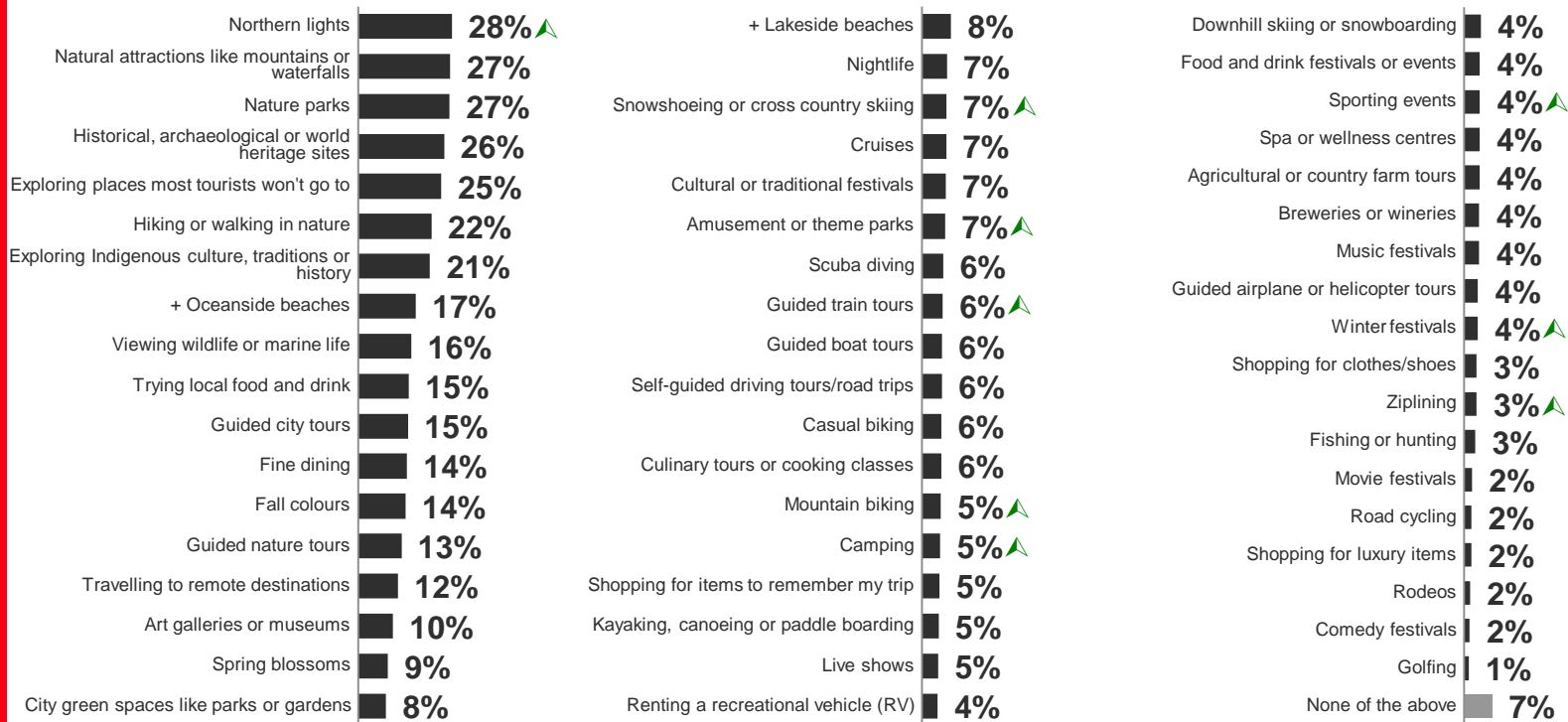
Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1500)

MP10. In general, what activities or places are you interested in while on vacation? (Select all that apply)

▲ ▼ Significantly higher/lower than 2020 GTW wave.

Activities to Base an Entire Trip Around

- Interest in seeing the Northern lights has increased among French travellers and is now the top activity they would base a trip around – this presents a key opportunity for Canada. Interest is also up in 2021 for more niche activities that Canada offers such as snowshoeing/cross country skiing, guided train tours, mountain biking, camping, winter festivals, and ziplining.



▲ / ▼ Significantly higher/lower than 2020 GTW wave.

+ New statement in 2021 GTW – no trending.

Base: Long-haul pleasure travellers (past 3 years or next 2 years) answering (n=1461)

MP12. Among these activities, are there any that are important enough that you would base an entire trip around that activity? (Select all that apply)

Time of Year Would Participate in Activities While on Holiday*

- Many nature based activities are equally or more popular in the spring compared to the summer, including hiking/walking in nature, nature parks, and natural attractions. Summer is the preferred season for many water-based activities including oceanside beaches, lakeside beaches, and kayaking/canoeing. Other popular activities such as trying local food and drink, experiencing Indigenous culture, fine dining, and art galleries/museums are popular year-round.


	Summer	Fall	Winter	Spring
Hiking or walking in nature	60%	47%	22%	73%
Nature parks	57%	39%	20%	67%
Trying local food and drink	73%	59%	57%	76%
Natural attractions like mountains or waterfalls	58%	33%	22%	60%
Oceanside beaches	90%	12%	8%	32%
Historical, archaeological or world heritage sites	63%	47%	27%	66%
Exploring Indigenous culture, traditions or history	70%	60%	50%	75%
Fine dining	71%	60%	61%	73%
Northern lights	20%	30%	66%	29%
Exploring places most tourists won't go to	42%	39%	28%	62%
Guided city tours	60%	48%	31%	78%
Viewing wildlife or marine life	62%	29%	21%	60%
Lakeside beaches	86%	16%	7%	42%
City green spaces like parks or gardens	67%	42%	19%	79%
Art galleries or museums	64%	57%	58%	74%
Fall colours	n/a	100%	n/a	n/a
Guided nature tours	53%	38%	22%	70%
Travelling to remote destinations	59%	36%	34%	63%

	Summer	Fall	Winter	Spring
Shopping for items that help me remember my trip	70%	56%	54%	74%
Spring blossoms	n/a	n/a	n/a	100%
Snowshoeing or cross country skiing	n/a	n/a	100%	n/a
Casual biking	68%	31%	11%	70%
Nightlife	77%	35%	35%	56%
Cultural or traditional festivals	67%	40%	33%	63%
Amusement or theme parks	69%	33%	19%	72%
Kayaking, canoeing or paddle boarding	79%	14%	11%	51%
Guided boat tours	74%	20%	13%	48%
Breweries or wineries	65%	56%	53%	70%
Culinary tours or cooking classes	58%	49%	50%	68%
Renting a recreational vehicle (RV)	66%	40%	34%	66%
Scuba diving	86%	13%	10%	39%
Mountain biking	69%	32%	19%	62%
Live shows	56%	48%	54%	68%
Food and drink festivals or events	62%	41%	36%	60%
Agricultural or country farm tours	42%	30%	19%	65%
Ziplining	71%	25%	17%	61%

	Summer	Fall	Winter	Spring
Camping	79%	18%	10%	45%
Shopping for clothes and shoes	67%	55%	56%	66%
Guided train tours	42%	36%	34%	64%
Self-guided driving tours or road trips	46%	35%	30%	64%
Music festivals	71%	26%	22%	61%
Downhill skiing or snowboarding	n/a	n/a	100%	n/a
Spa or wellness centres	58%	48%	56%	64%
Cruises	55%	19%	16%	50%
Guided airplane or helicopter tours	55%	36%	21%	60%
Winter festivals	n/a	n/a	100%	n/a
Road cycling	62%	27%	17%	60%
Sporting events	56%	40%	47%	65%
Fishing or hunting	55%	34%	23%	57%
Movie festivals	58%	38%	44%	53%
Comedy festivals	52%	38%	42%	67%
Shopping for luxury items	67%	44%	56%	64%
Rodeos	61%	25%	20%	58%
Golfing	59%	23%	13%	67%

* New question in 2021 GTW – no trending.

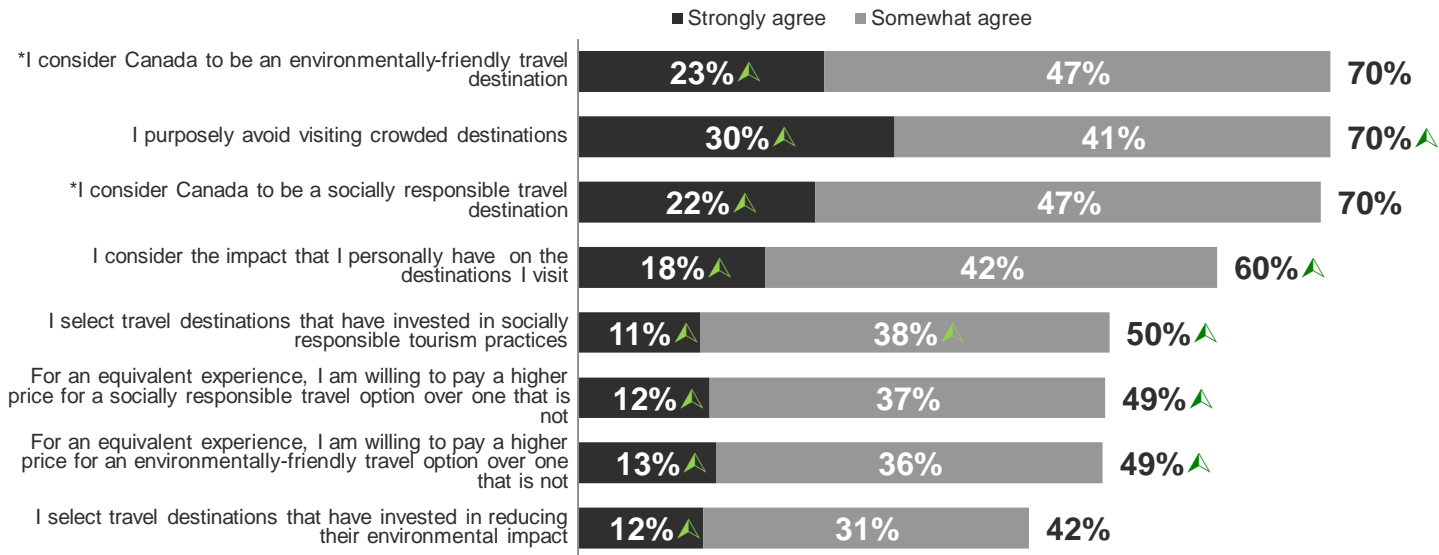
Base: Long-haul pleasure travellers (past 3 years or next 2 years) interested in activity MP10A. Thinking about activities or places you are interested in while on vacation, when would you typically take part in these activities? (Select all that apply) Note that the seasons refer to the destination's seasons.

 >50% of respondents who are interested in the activity would participate in this season

 40-49% of respondents who are interested in the activity would participate in this season

Sustainable Travel

- ▶ 60% of French travellers say they are thinking about the personal impact of their travel on destinations, with nearly half saying they would pay more for environmentally and socially responsible options (up significantly from 2020).
- ▶ Significantly more French travellers say they are purposely avoiding crowded destinations.
- ▶ A majority of those interested in taking a trip to Canada consider it to be a socially responsible and environmentally-friendly travel destination.
- ▶ However, a much smaller number mention the availability of eco-friendly (17%) or socially responsible (10%) travel options as factors influencing their choice of Canada as a travel destination.¹



¹ Data can be found on page 32.

* Base: Asked among those in the dream to purchase stages of the path to purchase for Canada (n=1190)

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1500)

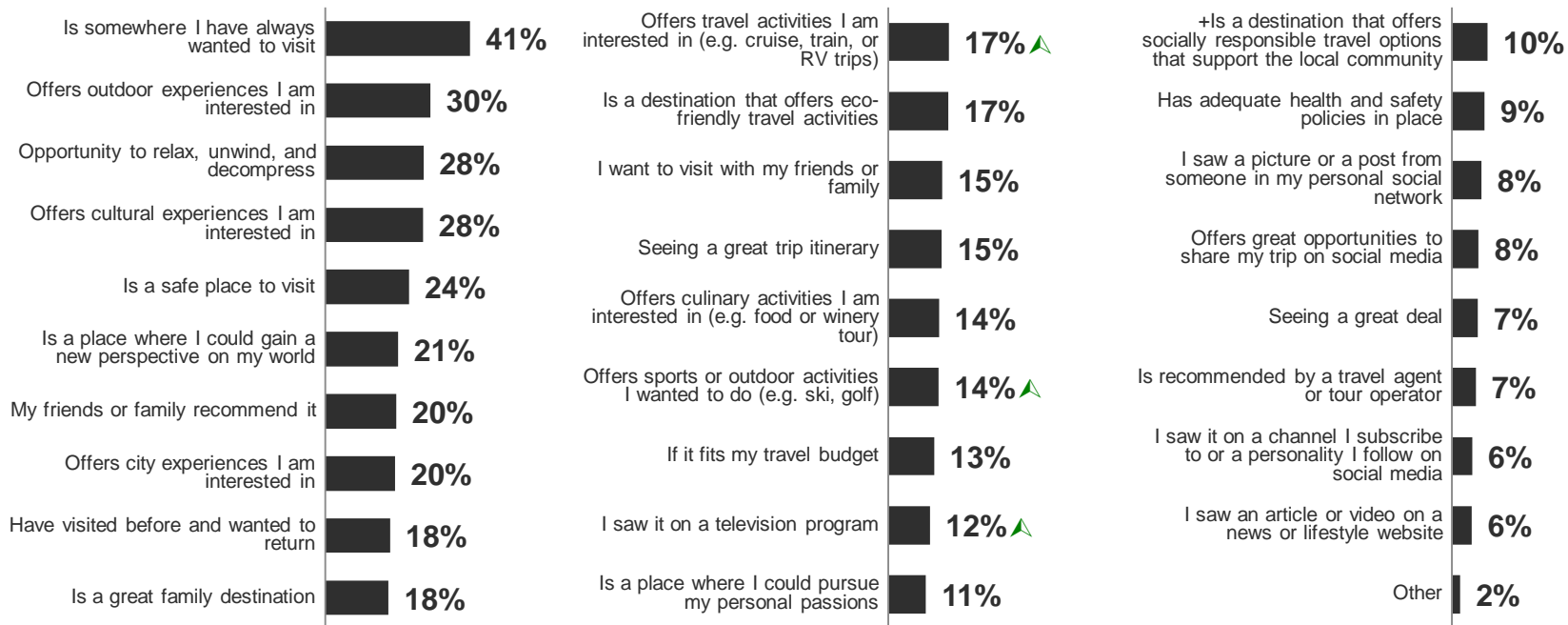
PC31. Sustainable travel refers to "travel that minimises any negative impact on the destination's environment, economy and society, while making positive contributions to the local people and conserving the destination's natural and cultural heritage". Please indicate your level of agreement with each of the following statements ...

▲ / ▼ Significantly higher/lower than 2020 GTW wave.

Key Characteristics of Future Trips to Canada

Factors Influencing Destination Choice

- ▶ A longstanding desire to visit, the availability of interesting outdoor experiences, the opportunity to de-stress, and the availability of interesting cultural experiences are the top factors influencing French travellers to choose Canada as a holiday destination.
- ▶ Offering interesting travel activities (e.g. cruise/train/RV), the availability of sports activities and seeing Canada on a television program have all increased in importance as reasons to choose Canada in 2021.



▲ / ▼ Significantly higher/lower than 2020 GTW wave.

+ New statement in 2021 GTW – no trending.

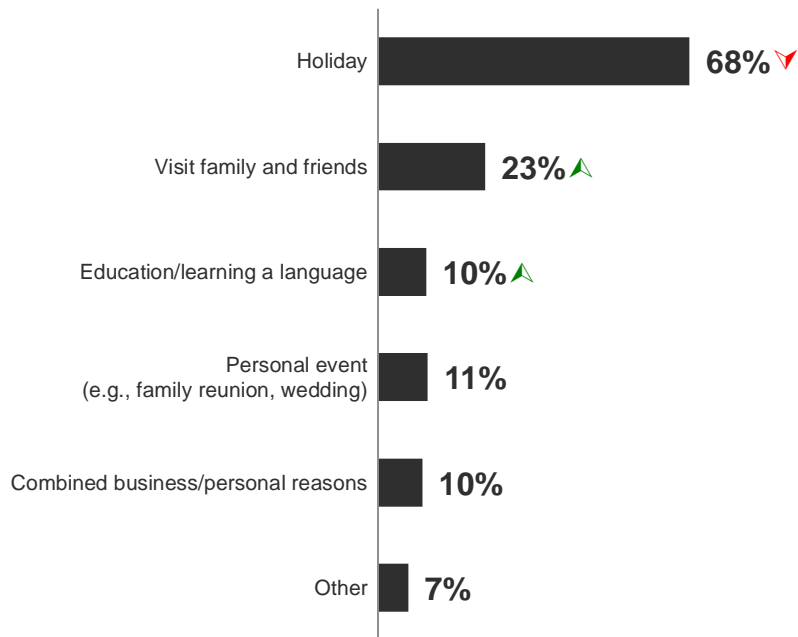
Base: Long-haul pleasure travellers (past 3 years or next 2 years) considering Canada (n=673)

FT3. Which of the following would factor into your choice to travel to [destination]? (Select all that apply)

Main Purpose and Travel Party of Future Trip

- ▶ Holiday trips will drive French travel to Canada in the next 2 years, but interest is dropping. VFR travel (trips to visit friends and relatives) and educational trips will playing an increasingly important role.
- ▶ French travel parties visiting Canada will be largely be made up of immediate family – primarily couples trips or family trips with children. Intent to travel with friends on a trip to Canada has declined since 2020.

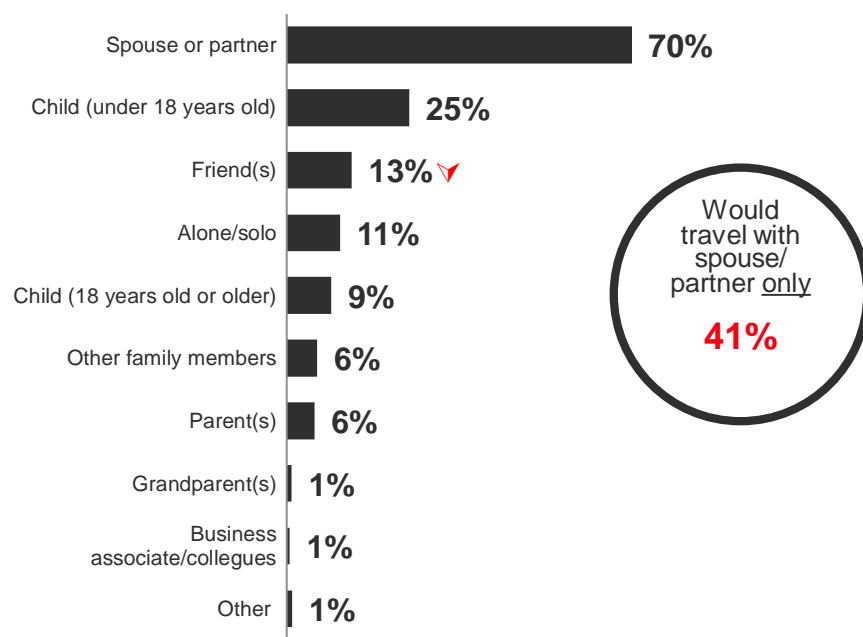
Purpose of Trip



▲ / ▼ Significantly higher/lower than 2020 GTW wave.

Base: Long-haul pleasure travellers (past 3 years or next 2 years) considering Canada (n=673) FT2. If you took a trip to Canada, what would be the main purpose of this trip?

Travel Party



Would travel with spouse/partner only

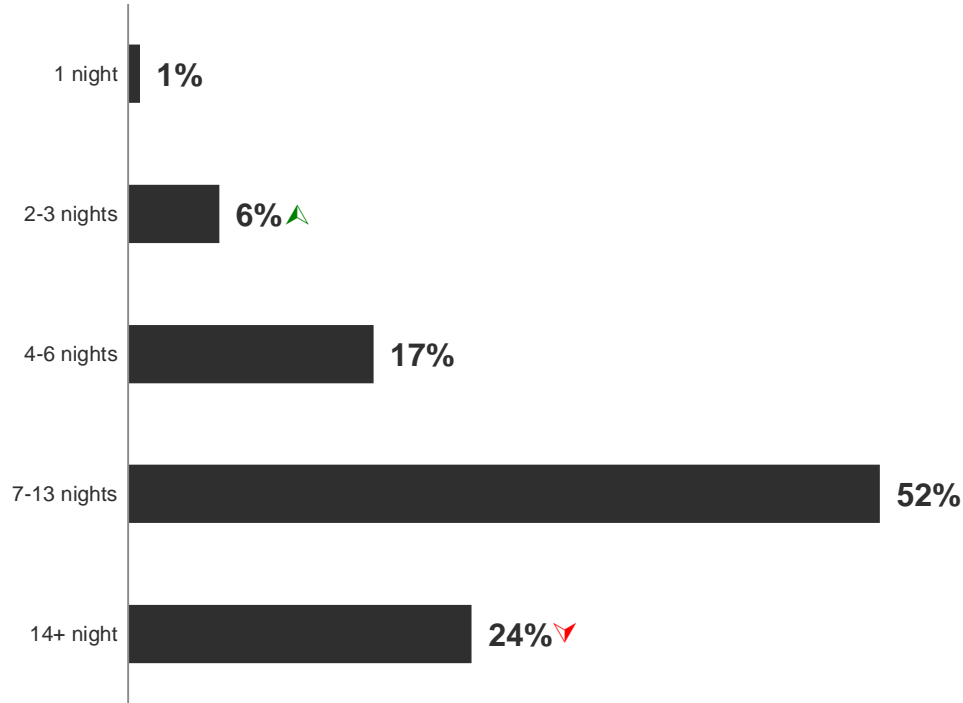
41%

▲ / ▼ Significantly higher/lower than 2020 GTW wave.

Base: Long-haul pleasure travellers (past 3 years or next 2 years) considering Canada (n=673) FT5. Who would you travel with on a trip to Canada? (Select all that apply)

Length of Future Trip

- ▶ French travellers typically would like to spend at least one week in Canada, with the greatest preference for a trip of 1-2 weeks. While a considerable number of French travellers are interested in spending more than two weeks on a trip to Canada, that proportion has declined since 2020.



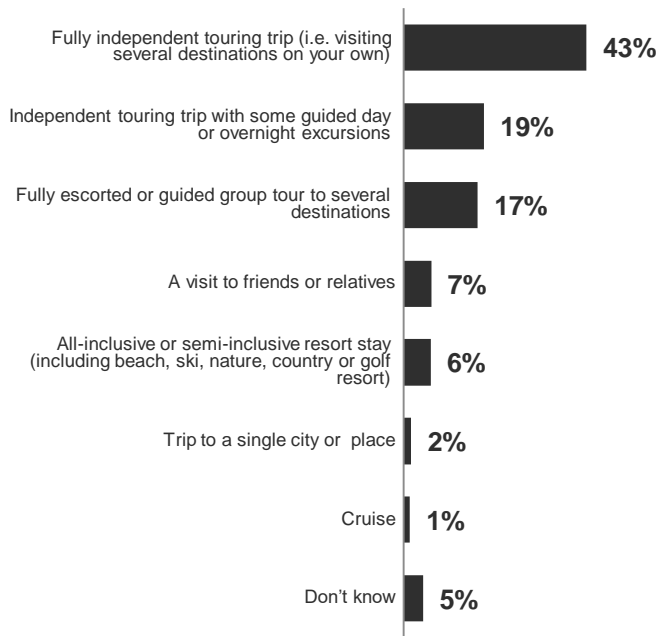
▲ / ▼ Significantly higher/lower than 2020 GTW wave.

Base: Long-haul pleasure travellers (past 3 years or next 2 years) considering Canada (n=673)
 FT4. How many nights do you think you would spend on a trip to Canada?

Trip Type and Accommodation for Future Trip

- ▶ Most French travellers would prefer to travel independently on a trip to Canada, either with or without the addition of some guided excursions as part of the trip.
- ▶ Mid-priced hotels remain the most preferred type of accommodation for a trip to Canada.

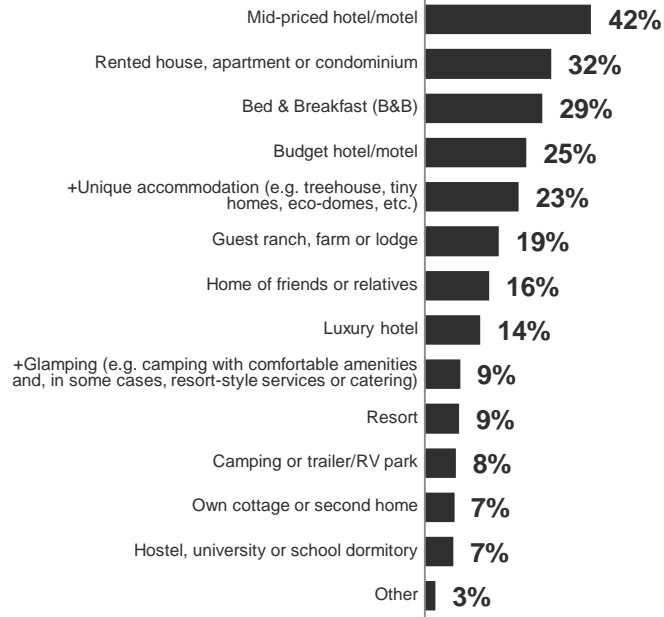
Trip Type



▲ / ▼ Significantly higher/lower than 2020 GTW wave.

Base: Long-haul pleasure travellers (past 3 years or next 2 years) considering Canada (n=673)
FT9. What type of trip do you think you would be most likely to book for a trip to Canada? (Select one)

Type of Accommodation



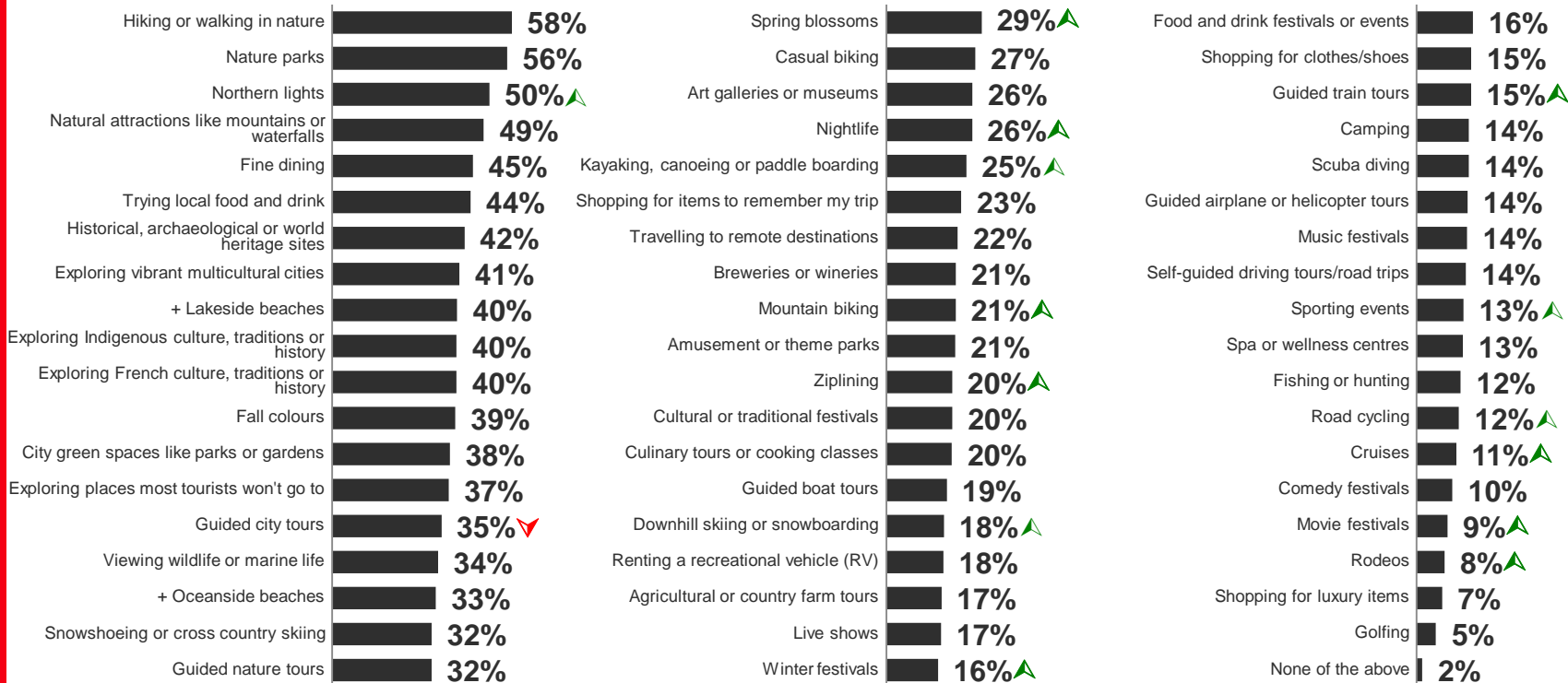
▲ / ▼ Significantly higher/lower than 2020 GTW wave.

+ New statement in 2021 GTW – no trending.

Base: Long-haul pleasure travellers (past 3 years or next 2 years) considering Canada (n=673)
FT10. Which types of accommodation would you consider staying at during a trip to Canada? (Select all that apply)

Activities Interested in on Future Trip to Canada

► French travellers continue to prefer nature-based activities on a trip to Canada. Of note, interest in the Northern Lights is up significantly and is now the third most popular activity of interest on a trip to Canada. Interest in several other niche activities is up significantly from 2020.



▲ / ▼ Significantly higher/lower than 2020 GTW wave.

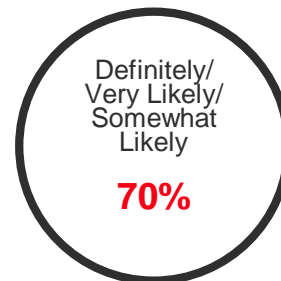
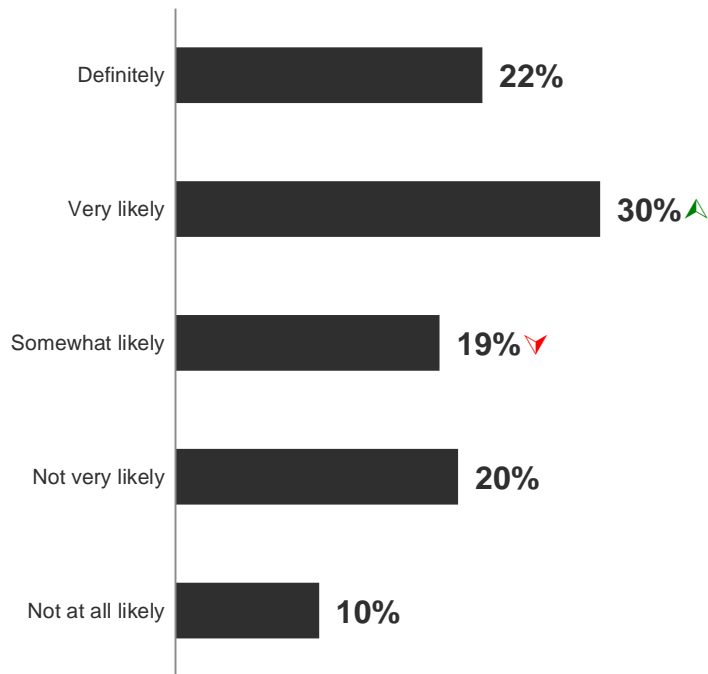
+ New statement in 2021 GTW – no trending.

Base: Long-haul pleasure travellers (past 3 years or next 2 years) considering Canada (n=673)

FT11. What activities would you be interested in participating in during a trip to Canada? (Select all that apply)

Travel Agent Usage for Future

- ▶ Travel agents and tour operators play a substantial role in supporting travel from France to Canada, with 70% of potential French visitors indicating that they are likely to use a travel agent to research or book a trip to Canada. Of note, the proportion saying they are very likely to use a travel agent is up significantly as fewer French travellers say they are somewhat likely to use an agent.



▲ / ▼ Significantly higher/lower than 2020 GTW wave.

Base: Long-haul pleasure travellers (past 3 years or next 2 years) considering Canada (n=673)

FT6. Travel agents offer personalized service to help individuals, groups, and business travellers plan and organize their travel schedules, from purchasing tour packages to booking flights and hotels. Examples of travel agents include Carrefour Voyages or Voyageurs du Monde, they do not include online booking engines like Expedia or Opodo. How likely are you to use a travel agent or tour operator to help you research or book a trip to Canada?