



5.5 million French long-haul leisure travellers intend to visit Canada in the next two years.

## 2018 Performance



2018 Arrivals<sup>1</sup>  
**604,170**  
(↑4.7%)



2018 Average Trip Spend<sup>2</sup>  
**\$1,430**

### Key Insights

- Arrivals from France set a new annual record in 2018 and surpassed the 600K mark for the first time.<sup>1</sup>
- In 2018, the purchasing power of the Euro relative to the Canadian Dollar (+5% compared to 2017) helped position Canada as a more attractive travel destination for French travellers.<sup>4</sup>
- French air arrivals direct from overseas soared 17% in 2018, with the largest gains registered in Quebec (+23% or +68K visitors, total 361K arrivals), Atlantic Canada (+168% or +6K visitors, total 9K arrivals) and British Columbia (+40% or +6K visitors, total 24K arrivals).<sup>1</sup>

## 2019 Forecast



Visitor Forecast<sup>2</sup>  
**627,730**  
(↑3.9%)



Spend Forecast (CAD)<sup>2</sup>  
**\$880 M**  
(↑4.5%)



Air Seat Capacity Growth<sup>3</sup>  
**↑9.8%**

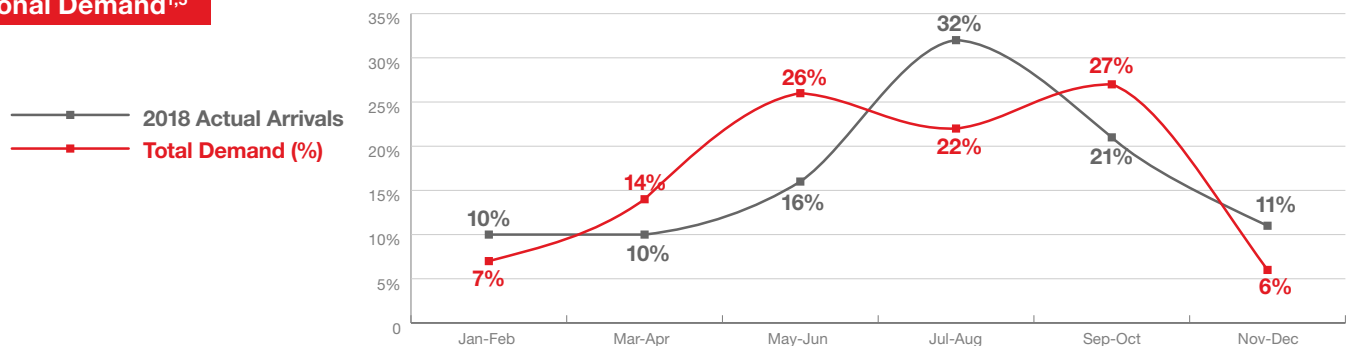


Local Currency vs. CAD<sup>4</sup>  
**↓3.1%**

## Market Insights

- In 2018, demand to visit Canada was highest between May to June, and September to October, while actual leisure arrivals reached their peak in July and August.<sup>1,5</sup>
- French leisure travellers want to explore Indigenous culture, try local food and drink, see natural attractions and heritage sites, and visit places that most tourists won't go while on holiday.<sup>5</sup>
- Half of French leisure travellers that visited Canada on their most recent trip purchased an organized group travel package, either online or in-person.<sup>5</sup>

## Seasonal Demand<sup>1,5</sup>



<sup>1</sup> Statistics Canada, Frontier Counts, 2018.

<sup>2</sup> Destination Canada Research estimates, using Statistics Canada preliminary 2018 Q1-Q3 VTS, 2017 ITS Q4, Frontier Counts, National Tourism Indicators, Bank of Canada and visitor forecasts from Destination Canada 2019 Forecast.

<sup>3</sup> IATA SRS Analyzer Data, March 2018.

<sup>4</sup> Bank of Canada.

<sup>5</sup> Global Tourism Watch 2018.



Market Potential<sup>5</sup>



Canada's target market  
**11,539,000**



**47%**  
are definitely/very likely to visit  
Canada in the next 2 years

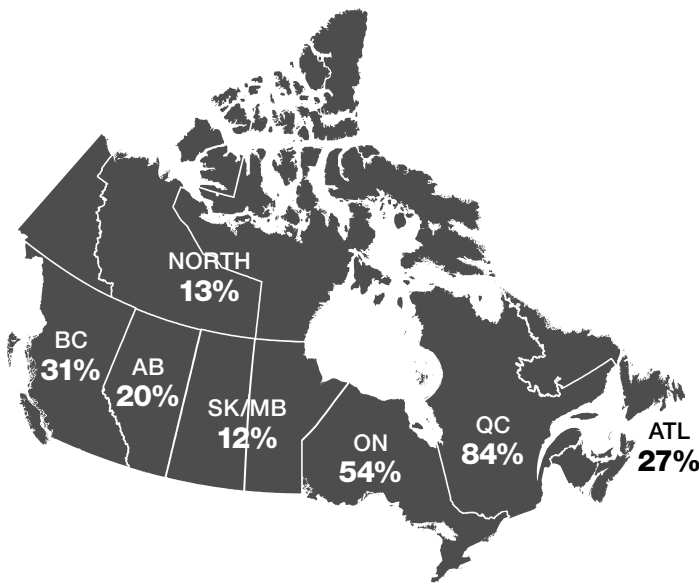


**5,469,500**  
Canada's immediate potential

Top Drivers for French Travellers to Any Destination<sup>5</sup>

- 1** Is a place I would be proud to tell people I have visited
- 2** Is a place that allows me to de-stress
- 3** Its cities are great for exploring and soaking in the atmosphere
- 4** Has beautiful outdoor scenery and landscapes
- 5** Has people that are friendly and welcoming
- 6** Offers adventures that challenge me
- 7** Has great historical & cultural experiences
- 8** Combines the best of both outdoor activities and city experiences
- 9** Is a place to spend quality time with friends and/or family
- 10** Is a place where I can experience things that I can't experience at home

Travel Consideration by Province,  
% Likely to Visit Region<sup>5</sup>



Travel Agent/Tour Operator Usage  
For Recent Trip to Canada<sup>5</sup>

Used for either research <u>or</u> booking	<b>60%</b>
Used for both research <u>and</u> booking	<b>32%</b>
Used for research <u>only</u>	<b>20%</b>
Used for booking <u>only</u>	<b>8%</b>

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<sup>5</sup> Global Tourism Watch 2018.