Key Insights

- Arrivals from France set a new annual record in 2018 and surpassed the 600K mark for the first time.¹
- 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.⁴
- 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).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.¹,⁵
- 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.⁵
- Half of French leisure travellers that visited Canada on their most recent trip purchased an organized group travel package, either online or in-person.⁵

Seasonal Demand¹,⁵

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¹ Statistics Canada, Frontier Counts, 2018.
³ IATA SRS Analyzer Data, March 2018.
⁴ Bank of Canada.
⁵ Global Tourism Watch 2018.
Canada’s target market
11,539,000

% Likely to visit
47%
Canada in the next 2 years

Canada’s immediate potential
5,469,500

Top Drivers for French Travellers to Any Destination
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 Agent/Tour Operator Usage For Recent Trip to Canada

<table>
<thead>
<tr>
<th>Used for either research or booking</th>
<th>60%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Used for both research and booking</td>
<td>32%</td>
</tr>
<tr>
<td>Used for research only</td>
<td>20%</td>
</tr>
<tr>
<td>Used for booking only</td>
<td>8%</td>
</tr>
</tbody>
</table>

Travel Consideration by Province, % Likely to Visit Region

<table>
<thead>
<tr>
<th>Province</th>
<th>Likely to Visit</th>
</tr>
</thead>
<tbody>
<tr>
<td>BC</td>
<td>31%</td>
</tr>
<tr>
<td>AB</td>
<td>20%</td>
</tr>
<tr>
<td>SK/MB</td>
<td>12%</td>
</tr>
<tr>
<td>ON</td>
<td>54%</td>
</tr>
<tr>
<td>QC</td>
<td>84%</td>
</tr>
<tr>
<td>NORTH</td>
<td>13%</td>
</tr>
<tr>
<td>ATL</td>
<td>27%</td>
</tr>
</tbody>
</table>

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Global Tourism Watch 2018.