



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

2018 Performance



2018 Arrivals¹
604,170
(↑4.7%)



2018 Average Trip Spend²
\$1,430

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

2019 Forecast



Visitor Forecast²
627,730
(↑3.9%)



Spend Forecast (CAD)²
\$880 M
(↑4.5%)



Air Seat Capacity Growth³
↑9.8%

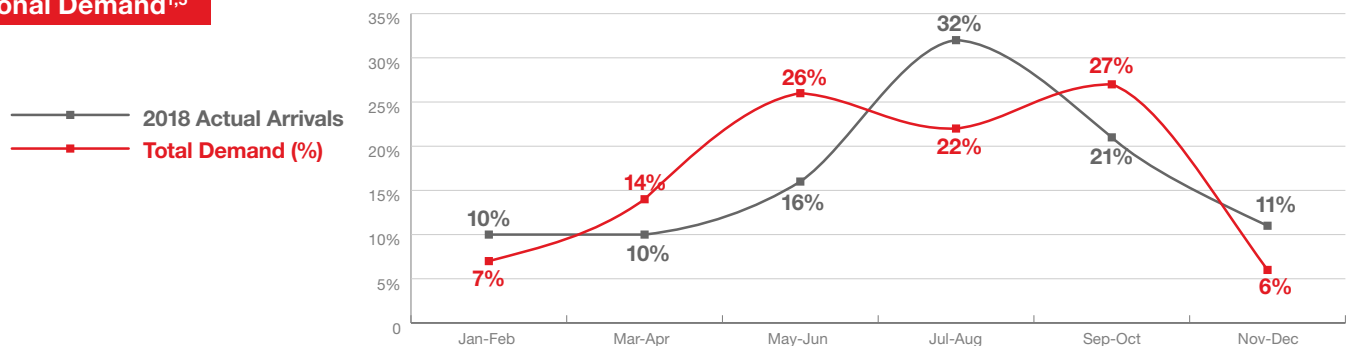


Local Currency vs. CAD⁴
↓3.1%

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.^{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 Demand^{1,5}



¹ Statistics Canada, Frontier Counts, 2018.

² 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.

³ IATA SRS Analyzer Data, March 2018.

⁴ Bank of Canada.

⁵ Global Tourism Watch 2018.



Market Potential⁵



Canada's target market
11,539,000



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

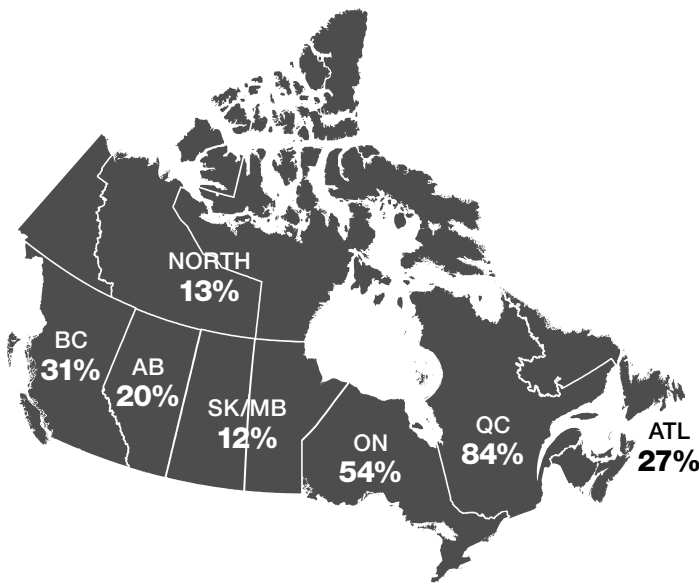


5,469,500
Canada's immediate potential

Top Drivers for French Travellers to Any Destination⁵

- 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 Region⁵



Travel Agent/Tour Operator Usage
For Recent Trip to Canada⁵

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

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⁵ Global Tourism Watch 2018.