# EUROPE & AUSTRALIA | 2026 MARKET HIGHLIGHTS

**France | Germany | UK | Australia**

**Canada is having a global moment.** Our brand reputation is strong, and our standing in highly respected global reputation rankings is soaring. Brand reputation directly influences whether travellers consider and choose Canada over other destinations. Canada's new *Canada, naturally.* brand platform sets the expectation that travel in Canada is real and authentic. Travellers can expect memorable experiences in nature, shaped by the openness of Canadians. That expectation builds trust when travellers experience that promise firsthand in Canada.

Against that backdrop, macroeconomic uncertainty persists and may contribute to rapid shifts in economic indicators and market sentiment.

## Macro Trends

Economic conditions across Europe are stable, with low to moderate growth and low inflation expected to continue through 2026, supporting outbound travel. Exchange rates continue to provide reasonable value for travel to Canada from many European markets. In Australia, economic conditions are constraining outbound travel overall, but they still present an opportunity among more affluent travellers.[1] Offsetting this, the Australian dollar is at a five-year high and is expected to remain broadly stable against the Canadian dollar, supporting consistent value for long-haul travel to Canada.

## Travel trends

Travel demand from Europe and Australia continues to show strong momentum, with 2027 Canada-bound volume expected to surpass 2025 levels by 13% from France, 8% from Germany, and 12% from Australia and 11% from the UK.[2]

Across these markets, travellers are increasingly seeking more meaningful and authentic travel experiences. They show strong interest in immersive experiences, nature and longer itineraries. Self-drive trips, rail travel, nature parks and cultural experiences remain particularly appealing. Indigenous experiences are also of notable interest. Not only is interest high, but awareness of Canada as a destination for Indigenous travel experiences is growing significantly in markets like Australia and Germany.[3]

Interest in blending business and leisure travel, as well as remote work, is also rising in several markets,[3] highlighting opportunities to position Canada as a destination for flexible travel experiences. This trend supports longer stays, shoulder-season travel, and experience-driven itineraries that blend work flexibility with exploration. For winter travel, Australia is a strong market. Air arrivals between December 2025 and February 2026 were up 10% year over year[4], signalling that winter demand is translating into actual visitation from this market.

Use of artificial intelligence (AI) tools in the travel planning process is growing rapidly across these markets, led by Australian travellers, though adoption trails that of Asian markets such as China and South Korea.[3]

## Implications for Canada

Europe and Australia remain reliable long-haul markets, characterized by strong travel intent, established trade relationships and relatively low travel barriers. Most travellers from the UK, Germany, France and Australia require only an electronic travel authorization (eTA) when flying to Canada.

Arrivals to Canada via land and water from the US have declined materially over the past year, down 18.3% for Germany, 15.7% for the UK, 27.8% for Australia and 6.3% for France.[5] The share of land/water arrivals constitute a relatively small percentage of total arrivals, ranging from 8% to 12% for these markets. This increases the importance of direct air capacity and routing through non-US hubs, amid reduced demand for dual-destination US trips. France has seen the strongest growth in air capacity over recent years, with the number of seats on direct flights in 2026 expected to reach 134% of 2019 levels. Air capacity from other markets is near pre-pandemic levels, with Germany at 103%, Australia at 100% and the UK at 99%.[6]

Total spend from Australia and European markets rose in 2025 compared to the previous year, with estimated spend per trip in Canada increasing 18% for Germany, 11% for France, 7% for Australia and 3% for the UK.[7] Spending growth from these markets outpaced visitation growth in 2025, suggesting a shift towards high-yield travellers.

For Canadian sellers, the immediate opportunity is to convert strong interest into longer stays and broader geographic exploration. Highlighting unique nature-based Canadian experiences and multi-destination itineraries can help turn strong travel intent into bookings. Beyond the product offering, success will hinge on connecting emotionally with travellers, who are increasingly seeking meaningful, authentic experiences rather than standard, pre-packaged itineraries.

[1] Roy Morgan Research, March 2026
[2] Destination Canada Tourism Outlook, 2026
[3] Global Traveller Research Program, 2025
[4] Statistics Canada. Leading Indicator of International Arrivals to Canada, 2026
[5] Statistics Canada Frontier Counts (IPIL Air integration restated for 2024), 2025
[6] OAG Traffic Analyzer, April 2026
[7] Destination Canada Lodging Aligned Spend Reporting (LASR), 2025

Prepared by Destination Canada's Collective Intelligence team (May 2026)

# FRANCE | 2026 MARKET HIGHLIGHTS

DESTINATION CANADA

- Leisure outbound travel volume is projected to grow +14% YoY in 2026.[1]
- Most French travellers require only an Electronic Travel Authorization (eTA) to enter Canada.
- The euro is expected to remain stable to slightly stronger against the CAD, supporting steady outbound travel affordability.
- Destination choice among French travellers is driven by values-based motivations, including authenticity, meaningful experiences, livability, and pride of visitation. For Canada specifically, French travellers are overwhelmingly driven by pride of visitation.[2]
- Compared to 2025, direct air capacity in 2026 is forecast to increase +2% YOY, which translates to just under 2 million available seats. Compared to 2019 levels, air capacity is at 134%.[3]

## Canada spend and visitation levels (% increase relative to 2025)[4]

| | 2025* | 2026 | 2027 | 2028 | 2029 | 2030 |
|---|---|---|---|---|---|---|
| Spend | $1.06B | +7% | +20% | +32% | +46% | +60% |
| Visitation | 600K | +4% | +13% | +21% | +29% | +37% |

0%-50% 51%-75% 76%-100% 101%-120% 121%+

Spend and visitation are both forecast to grow by 2030, with spend expected to outpace visitor growth. Compared to 2025 levels, visitation is projected to increase by 37%, from 600k to 820.5k visitors, while spend is expected to grow by 60%, from $1.06B to $1.69B.

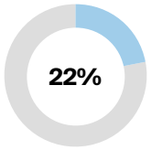
**Explore the Canadian Tourism Outlook 2026-2035:** www.tourismdatacollective.ca/tourism-outlook-2026-2035

## Canada's Opportunity

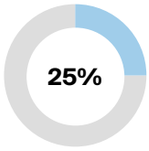



Canada's total opportunity in next 2 years (definitely/very likely to visit)[2]

## Organized group tour on Canada trip (past 3 years)[2]



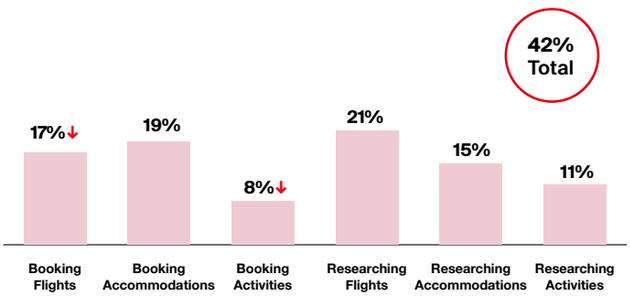

Yes, whole trip




Yes, portion of trip

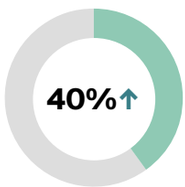
This suggests some demand for flexible, modular tour experiences, with travellers slightly more likely to join a group tour for part of their trip (25%) than for the full trip (22%).

## Use travel agent/tour operator on Canada trip (past 3 years)[2]




This shows moderate reliance on travel agents and tour operators, with 42% of travellers using them for their Canada trip. Their role is more important for flights and accommodations.

## Use AI tools to research, plan and book trips[2]




**Explore the Global Traveller Research Program Highlights Report:**
www.tourismdatacollective.ca/global-traveller-research-program/highlight-reports

[1] Oxford Economics Global Traveller Services, 2026
[2] Global Traveller Research Program, 2025
[3] OAG Traffic Analyzer, April 2026
[4] Destination Canada Tourism Outlook, 2026

*2025 figures are Destination Canada forecasts and may differ slightly from final arrival and spend data.

↑/↓ significant increase/decrease vs. previous year

# FRANCE | 2026 MARKET HIGHLIGHTS

DESTINATION CANADA

## REFINED GLOBETROTTERS

We prioritize travel above all, indulging in world-class destinations, gourmet dining, and exclusive experiences. We are experienced travellers who are always on the lookout for new, unique places to cross of our list.

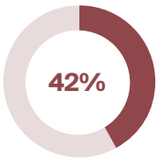
**Refined Globetrotters segment size[2]**

3,900,000

**Canada's Refined Globetrotters opportunity in next 2 years (definitely/very likely to visit)[2]**

1,412,000

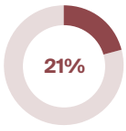
**Use travel agent/tour operator on Canada trip (past 3 years)[5]**




**Organized group tour on Canada trip (past 3 years)[5]**




Yes, whole trip




Yes, portion of trip

**Use AI tools to research, plan and book trips[2]**




## OUTDOOR EXPLORERS

We are nature explorers who crave the thrill of unknown landscapes and overcoming challenges. Adventure travel allows us to grow, learn new skills, and establish personal traditions.

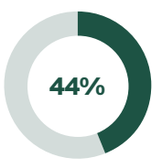
**Outdoor Explorers segment size[2]**

5,260,500

**Canada's Outdoor Explorers opportunity in next 2 years (definitely/very likely to visit)[2]**

1,559,000

**Use travel agent/tour operator on Canada trip (past 3 years)[5]**




**Organized group tour on Canada trip (past 3 years)[5]**




Yes, whole trip




Yes, portion of trip

**Use AI tools to research, plan and book trips[2]**




[2] Global Traveller Research Program, 2025
[5] Global Traveller Research Program, 2024 & 2025

↑/↓ significant increase/decrease vs. previous year

**For further information, please contact:**

Cyrielle Bon | Managing Director | T +33-0-7-71-21-97-87 | cyrielle@360tourisme.fr

# GERMANY | 2026 MARKET HIGHLIGHTS

DESTINATION CANADA

- Leisure outbound travel volume is projected to grow +8% YoY in 2026.[1]
- Most German travellers require only an Electronic Travel Authorization (eTA) to enter Canada.
- The euro is expected to remain stable to slightly stronger against the CAD, supporting steady outbound travel affordability.
- Destination choice among German travellers is driven by values-based motivations, including livability and authenticity, and they are also looking for a place to visit with their families.[2]
- Compared to 2025, direct air capacity in 2026 is forecast to increase +1% YOY, which translates to over 1.3 million available seats. Compared to 2019 levels, air capacity is at 103%.[3]

## Canada spend and visitation levels (% increase relative to 2025)[4]

| | 2025* | 2026 | 2027 | 2028 | 2029 | 2030 |
|---|---|---|---|---|---|---|
| Spend | $727M | +5% | +18% | +32% | +44% | +57% |
| Visitation | 307K | -1% | +8% | +17% | +25% | +30% |

0%-50% 51%-75% 76%-100% 101%-120% 121%+

Spend and visitation are both forecast to grow by 2030, with spend expected to outpace visitor growth. Compared to 2025 levels, visitation is projected to increase by 30%, from 306.5k to 400k visitors, while spend is expected to grow by 57%, from $727M to $1.14B.

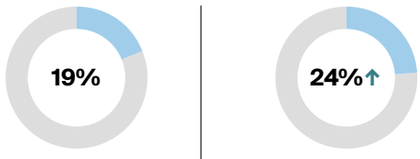
**Explore the Canadian Tourism Outlook 2026-2035:** www.tourismdatacollective.ca/tourism-outlook-2026-2035

## Canada's Opportunity



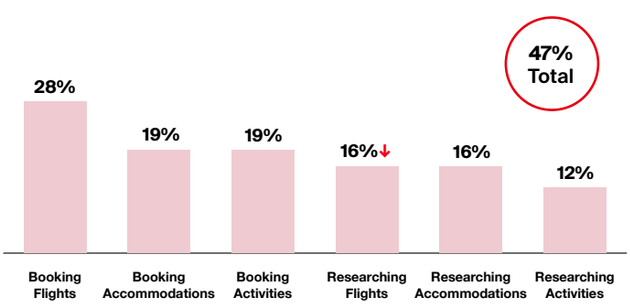

Canada's total opportunity in next 2 years (definitely/very likely to visit)[2]

## Organized group tour on Canada trip (past 3 years)[2]



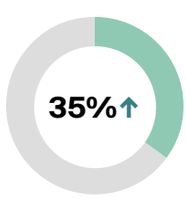

This suggests stronger demand for flexible, modular tour experiences, with travellers more likely to join a group tour for part of their trip (24%) than for the full trip (19%).

## Use travel agent/tour operator on Canada trip (past 3 years)[2]




Travel agents and tour operators are an important conversion channel in this market, with nearly half of travellers using them for their Canada trip (47%). Travellers leverage for complex and longer-stay itineraries, as well as financial protections available in case of cancellations/disruptions.

## Use AI tools to research, plan and book trips[2]




**Explore the Global Traveller Research Program Highlights Report:**
www.tourismdatacollective.ca/global-traveller-research-program/highlight-reports

[1] Oxford Economics Global Traveller Services, 2026
[2] Global Traveller Research Program, 2025
[3] OAG Traffic Analyzer, April 2026
[4] Destination Canada Tourism Outlook, 2026

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↑/↓ significant increase/decrease vs. previous year

# GERMANY | 2026 MARKET HIGHLIGHTS

DESTINATION CANADA

## REFINED GLOBETROTTERS

We prioritize travel above all, indulging in world-class destinations, gourmet dining, and exclusive experiences. We are experienced travellers who are always on the lookout for new, unique places to cross of our list.

**Refined Globetrotters segment size[2]**

5,373,000

**Canada's Refined Globetrotters opportunity in next 2 years (definitely/very likely to visit)[2]**

1,526,000

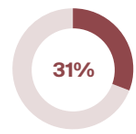
**Use travel agent/tour operator on Canada trip (past 3 years)[5]**




**Organized group tour on Canada trip (past 3 years)[5]**

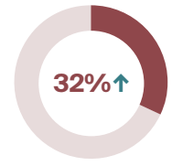



Yes, whole trip




Yes, portion of trip

**Use AI tools to research, plan and book trips[2]**




## OUTDOOR EXPLORERS

We are nature explorers who crave the thrill of unknown landscapes and overcoming challenges. Adventure travel allows us to grow, learn new skills, and establish personal traditions.

**Outdoor Explorers segment size[2]**

5,849,500

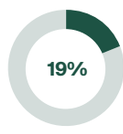
**Canada's Outdoor Explorers opportunity in next 2 years (definitely/very likely to visit)[2]**

1,596,500

**Use travel agent/tour operator on Canada trip (past 3 years)[5]**




**Organized group tour on Canada trip (past 3 years)[5]**

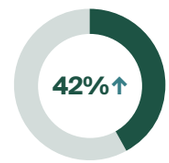



Yes, whole trip




Yes, portion of trip

**Use AI tools to research, plan and book trips[2]**




[2] Global Traveller Research Program, 2025
[5] Global Traveller Research Program, 2024 & 2025

↑/↓ significant increase/decrease vs. previous year

**For further information, please contact:**

Andreas Schunck | Managing Director | T +49-176-3165-0991 | andreas@newage-marketing.com

# UK | 2026 MARKET HIGHLIGHTS

- Leisure outbound travel volume is projected to grow +0.3% YoY in 2026, the lowest out of all Destination Canada core markets.[1]
- Most UK travellers require only an Electronic Travel Authorization (eTA) to enter Canada.
- The British pound is expected to remain stable to slightly stronger against the CAD, reinforcing Canada's value for UK travellers.
- While new experiences and culture are the strongest overall drivers of destination choice, UK travellers considering Canada place greater emphasis on value for money as well as authentic experiences.[2]
- Compared to 2025, direct air capacity in 2026 is forecast to increase +3% YOY, which translates to over 2 million available seats. Compared to 2019 levels, air capacity is at 99%.[3]

## Canada spend and visitation levels (% increase relative to 2025)[4]

| | 2025* | 2026 | 2027 | 2028 | 2029 | 2030 |
|---|---|---|---|---|---|---|
| Spend | $1.84B | +6% | +16% | +29% | +42% | +57% |
| Visitation | 777K | +4% | +11% | +19% | +27% | +35% |

0%-50% 51%-75% 76%-100% 101%-120% 121%+

Spend and visitation are both forecast to grow by 2030, with spend expected to outpace visitor growth. Compared to 2025 levels, visitation is projected to increase by 35%, from 777k to 1.049M visitors, while spend is expected to grow by 57%, from $1.84B to $2.89B.

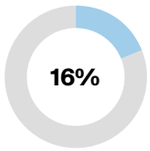
**Explore the Canadian Tourism Outlook 2026-2035:** www.tourismdatacollective.ca/tourism-outlook-2026-2035

## Canada's Opportunity

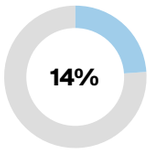



Canada's total opportunity in next 2 years (definitely/very likely to visit)[2]

## Organized group tour on Canada trip (past 3 years)[2]



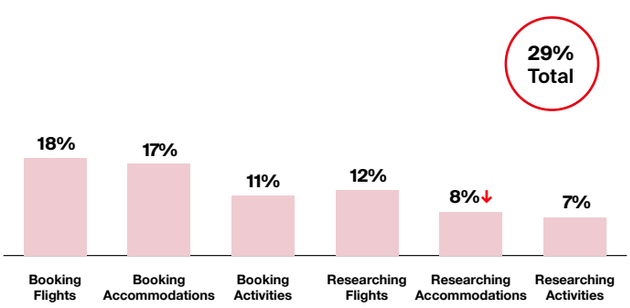

Yes, whole trip




Yes, portion of trip

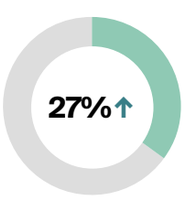
Organized group tours play a smaller role in this market, with similar usage for full-trip group tours (16%) and partial-trip group tours (14%).

## Use travel agent/tour operator on Canada trip (past 3 years)[2]




This shows lower reliance on travel agents and tour operators, with 29% of travellers using them for their Canada trip. Their role is more focused on booking than research, particularly for flights and accommodations.

## Use AI tools to research, plan and book trips[2]




**Explore the Global Traveller Research Program Highlights Report:**
www.tourismdatacollective.ca/global-traveller-research-program/highlight-reports

[1] Oxford Economics Global Traveller Services, 2026
[2] Global Traveller Research Program, 2025
[3] OAG Traffic Analyzer, April 2026
[4] Destination Canada Tourism Outlook, 2026

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# UK | 2026 MARKET HIGHLIGHTS

DESTINATION CANADA

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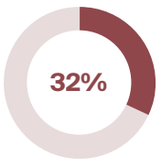
**Refined Globetrotters segment size[2]**

3,781,000

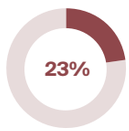
**Canada's Refined Globetrotters opportunity in next 2 years (definitely/very likely to visit)[2]**

1,029,000

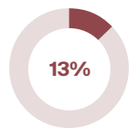
**Use travel agent/tour operator on Canada trip (past 3 years)[5]**




**Organized group tour on Canada trip (past 3 years)[5]**

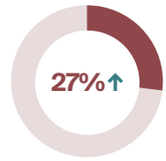



Yes, whole trip




Yes, portion of trip

**Use AI tools to research, plan and book trips[2]**




## OUTDOOR EXPLORERS

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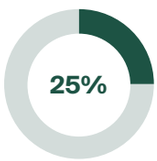
**Outdoor Explorers segment size[2]**

3,574,000

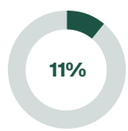
**Canada's Outdoor Explorers opportunity in next 2 years (definitely/very likely to visit)[2]**

1,055,000

**Use travel agent/tour operator on Canada trip (past 3 years)[5]**




**Organized group tour on Canada trip (past 3 years)[5]**




Yes, whole trip




Yes, portion of trip

**Use AI tools to research, plan and book trips[2]**




[2] Global Traveller Research Program, 2025
[5] Global Traveller Research Program, 2024 & 2025

↑/↓ significant increase/decrease vs. previous year

**For further information, please contact:**

Kate Bitfield-Heraldsson | Managing Director | T +07591 836392 | haraldsson.kate@destinationcanada.com

# AUSTRALIA | 2026 MARKET HIGHLIGHTS

DESTINATION CANADA

- Leisure outbound travel volume is projected to grow +7% YOY in 2026.[1]
- Most Australian travellers require only an Electronic Travel Authorization (eTA) to enter Canada.
- The Australian dollar is expected to remain broadly stable against the CAD, supporting consistent long-haul travel value for Canada.
- While value for money is the strongest overall driver of destination choice, Australians also desire meaningful, authentic experiences. When considering Canada specifically, cultural elements such as arts, festivals, and dining are key contributors to its appeal.[2]
- Compared to 2025, direct air capacity in 2026 is forecast to increase +8% YOY, which translates to over 250,000 available seats. Compared to 2019 levels, air capacity is at 100%.[3]

## Canada spend and visitation levels (% increase relative to 2025)[4]

| | 2025* | 2026 | 2027 | 2028 | 2029 | 2030 |
|---|---|---|---|---|---|---|
| Spend | $1.05B | +6% | +20% | +34% | +48% | +60% |
| Visitation | 255K | +1% | +12% | +21% | +28% | +33% |

0%-50% 51%-75% 76%-100% 101%-120% 121%+

Spend and visitation are both forecast to grow by 2030, with spend expected to outpace visitor growth. Compared to 2025 levels, visitation is projected to increase by 33%, from 254.5k to 339k visitors, while spend is expected to grow by 60%, from $1.05B to $1.68B.

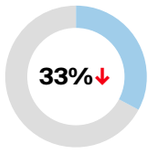
**Explore the Canadian Tourism Outlook 2026-2035:** www.tourismdatacollective.ca/tourism-outlook-2026-2035

## Canada's Opportunity

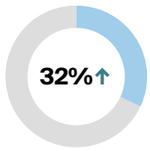



Canada's total opportunity in next 2 years (definitely/very likely to visit)[2]

## Organized group tour on Canada trip (past 3 years)[2]




Yes, whole trip




Yes, portion of trip

This suggests steady demand for organized group tours, with travellers almost equally likely to join a group tour for their full trip (33%) as for part of their trip (32%).

## Use travel agent/tour operator on Canada trip (past 3 years)[2]




Nearly two-thirds of travellers use travel agents and tour operators for their Canada trip (63%). Their role is important across both research and booking.

## Use AI tools to research, plan and book trips[2]




**Explore the Global Traveller Research Program Highlights Report:**
www.tourismdatacollective.ca/global-traveller-research-program/highlight-reports

[1] Oxford Economics Global Traveller Services, 2026
[2] Global Traveller Research Program, 2025
[3] OAG Traffic Analyzer, April 2026
[4] Destination Canada Tourism Outlook, 2026

*2025 figures are Destination Canada forecasts and may differ slightly from final arrival and spend data.

↑/↓ significant increase/decrease vs. previous year

# AUSTRALIA | 2026 MARKET HIGHLIGHTS

DESTINATION CANADA

## REFINED GLOBETROTTERS

We prioritize travel above all, indulging in world-class destinations, gourmet dining, and exclusive experiences. We are experienced travellers who are always on the lookout for new, unique places to cross of our list.

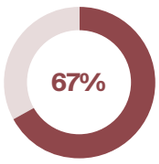
**Refined Globetrotters segment size[2]**

2,017,500

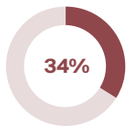
**Canada's Refined Globetrotters opportunity in next 2 years (definitely/very likely to visit)[2]**

745,500

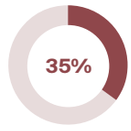
**Use travel agent/tour operator on Canada trip (past 3 years)[5]**




**Organized group tour on Canada trip (past 3 years)[5]**

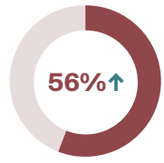



Yes, whole trip




Yes, portion of trip

**Use AI tools to research, plan and book trips[2]**




## OUTDOOR EXPLORERS

We are nature explorers who crave the thrill of unknown landscapes and overcoming challenges. Adventure travel allows us to grow, learn new skills, and establish personal traditions.

**Outdoor Explorers segment size[2]**

2,362,000

**Canada's Outdoor Explorers opportunity in next 2 years (definitely/very likely to visit)[2]**

955,000

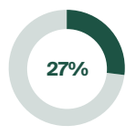
**Use travel agent/tour operator on Canada trip (past 3 years)[5]**




**Organized group tour on Canada trip (past 3 years)[5]**




Yes, whole trip




Yes, portion of trip

**Use AI tools to research, plan and book trips[2]**




[2] Global Traveller Research Program, 2025
[5] Global Traveller Research Program, 2024 & 2025

↑/↓ significant increase/decrease vs. previous year

**For further information, please contact:**

Julie King | Managing Director | T +61-428-026-093 | julie.king@jkingassociates.com