



Both spending and visitation by French travellers are expected to recover and exceed 2019 levels by 2025.

Market Insights

Spending More and Off the Beaten Paths

The French are spending more when travelling, adding experiences and unusual accommodations to their itineraries. They are also eager to find off the-beaten-path destinations with unique spaces and experiences in both urban and regional setting, all qualities that Canada is well positioned to deliver.

Regenerative Tourism

There is increasing awareness of environmental mindfulness amongst French travellers. They are looking for authentic experiences while staying longer and giving back to communities. In destination, they are interested in sustainable forms of transportation and slow travel options such as train travel, canoe-camping and cycling.

Discovery Travellers

French travellers are looking for the unknown to discover and reconnect with themselves. They are also interested in interacting with locals and Canada is perceived as a safe destination that provides friendly and welcoming hospitality to travellers.

Market Forecast (as of Fall 2022)¹

Spending and visitation levels (% relative to 2019)

	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030
Spend	100	12	19	63	78	92	114	125	132	138	146	153
Visitation	100	14	18	61	71	82	101	109	114	118	123	127

● 0%-50% ● 50%-75% ● 75%-100% ● 100%-120% ● 120%+

The following are the context and assumptions used to develop the Fall 2022 Market Forecast:¹



Travel sentiment and covid restrictions

- European travellers are showing a significant desire to travel following the reopening of borders.
- France was a top source market of electronic travel authorization (eTA) applications in the first eleven months of 2022, and in 2022, 474,000 French travellers visited Canada.



International travel conditions

- Consumer sentiment will remain weak in the short-term, and travellers will face weaker real purchasing power in the near term as the Euro weakens relative to the Canadian dollar.
- Canadian prices have risen faster than in France.



Economy

- France is expected to face high inflation due to increasing energy prices.
- France will enter a recession and only see 0.1% GDP growth in 2023.
- Energy shortages present a further economic risk.
- Economic headwinds will weigh on disposable income, creating slower growth in overnight arrivals.

¹ Tourism Outlook Forecast Highlights, Fall 2022.



Total Long-Haul Travellers

French aged 18 and older who have taken a long-haul leisure trip outside of Europe, North Africa and the Mediterranean in the past three years, or plan to take such a trip in the next two years.

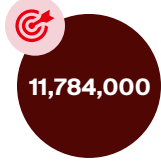
High Value Guests

High value guests (HVGs) immerse themselves in a destination, embrace heritage and culture, and genuinely seek to leave the destination better than they found it. They tend to be more affluent and educated than the average traveller. They share a curiosity for deeper, richer experiences.

Potential Market Size²



Total potential long-haul travellers



Canada's target market



Canada's immediate potential in the next 2 years



Total potential HVG travellers

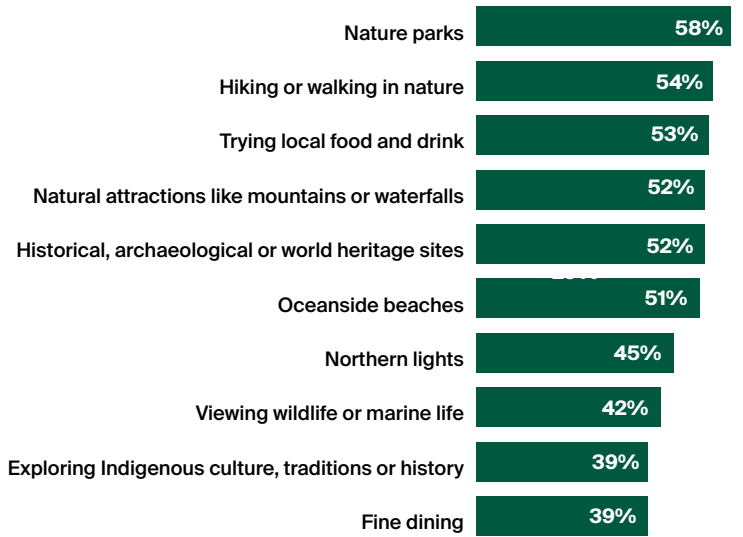
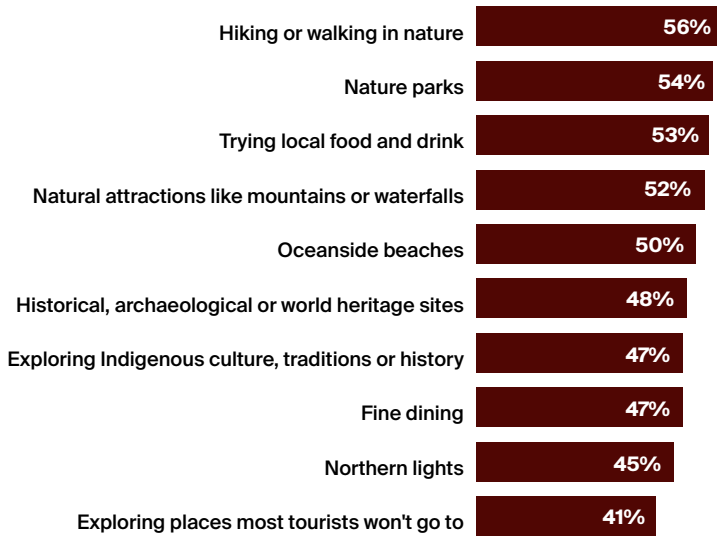


Canada's HVG target market

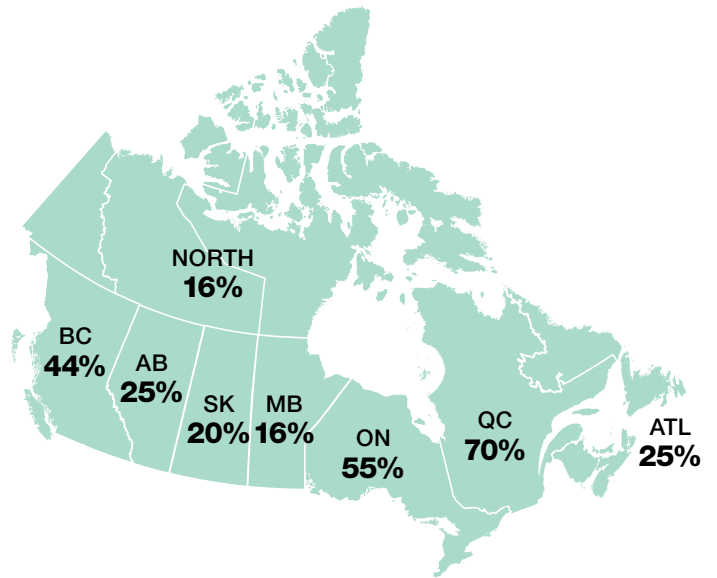
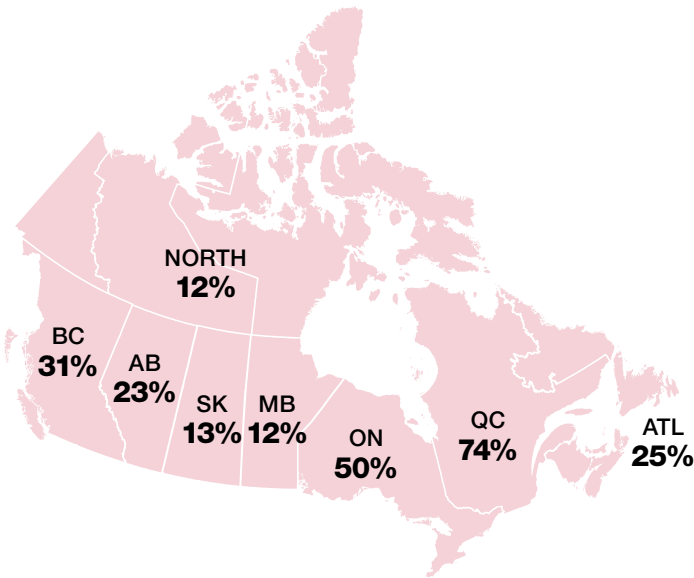


Canada's HVG immediate potential in the next 2 years

Top Activities of Interest While on Vacation³



Likelihood to Visit Canadian Regions (Next 2 Years)³



Travel Agent Usage for Future Trip to Canada³

NET Definitely / Very / Somewhat Likely
70%

NET Definitely / Very / Somewhat Likely
80%

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² Global Market Sizing 2022.
³ Global Tourism Watch 2021.