



Spending by French travellers is forecast to recover to 2019 levels in 2023, visitation levels are not expected to recover until 2025.

Market Forecast Insights

France has been among the fastest recovering European markets in terms of both visits to Canada and spending. The number of overnight visitors from France to Canada reached 596,000 in 2023, 90% of 2019 levels. Spending by these travellers is expected to exceed 2019 levels of spending by 2%.

- Visitation by French travellers is expected to recover in 2025, reaching 103% of 2019 levels.
- Spending by French travellers is expected to reach 118% of 2019 levels in 2025.
- In 2025, Canada is expected to welcome 681,000 overnight visitors who will spend \$1.2 billion.

Market Forecast Highlights¹

Spending and visitation levels (% relative to 2019)

	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030
Spend	100	12	22	77	102	107	118	132	144	158	170	179
Visitation	100	14	18	70	90	94	103	105	112	120	128	134

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

Forecast Context and Assumptions¹



Travel Sentiment

- Almost half (45%) of the French population is planning an international trip in the next 12 months. This was a lower percentage than in Destination Canada's other European markets.²
- Cost concerns are greater in France than other European markets. Forty-eight percent cited the price of travel, and 33% cited the cost of accommodation as the main barrier to travel.²



International Travel Conditions

- A weak economic outlook and sentiment for travel is not deterring travellers from visiting Canada. Arrivals from France reached 596,000 in 2023. This was the second strongest recovery in visits behind Mexico.



Economy³

- Economic growth is relatively weak and expected to grow 0.8% in 2023 and 0.6% in 2024.
- After depreciating more than 14% in 2022 and another 1% this year, the Canadian dollar is expected to strengthen against the Euro in 2024. The Canadian dollar will continue to strengthen in 2025/26, making Canada a more expensive vacation destination.

The DC Tourism Outlook Fall 2023 has been adjusted from 2023 to 2025 to reflect the latest arrival numbers.

¹ DC Tourism Outlook Forecast, Fall 2023

² YouGov Global Travel Profiles | December 2023

³ Oxford Economics



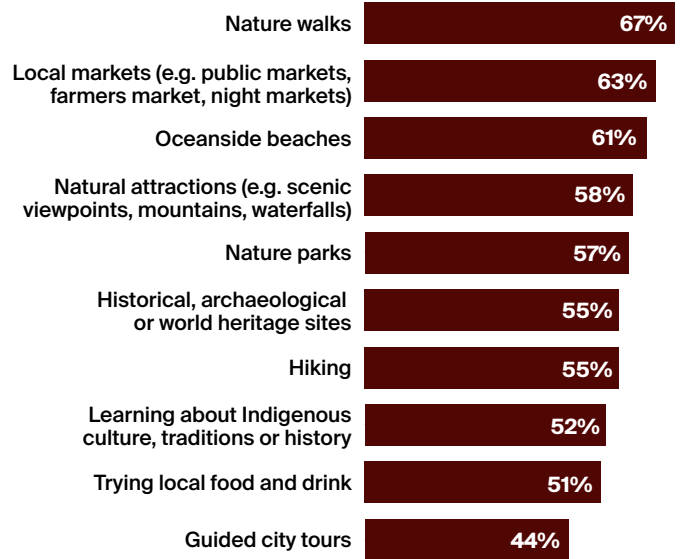
Total Long-Haul Travellers

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

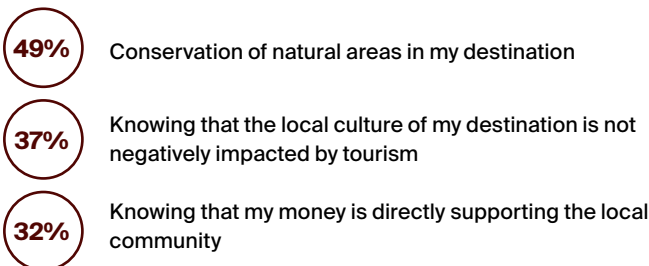
Potential Market Size⁴



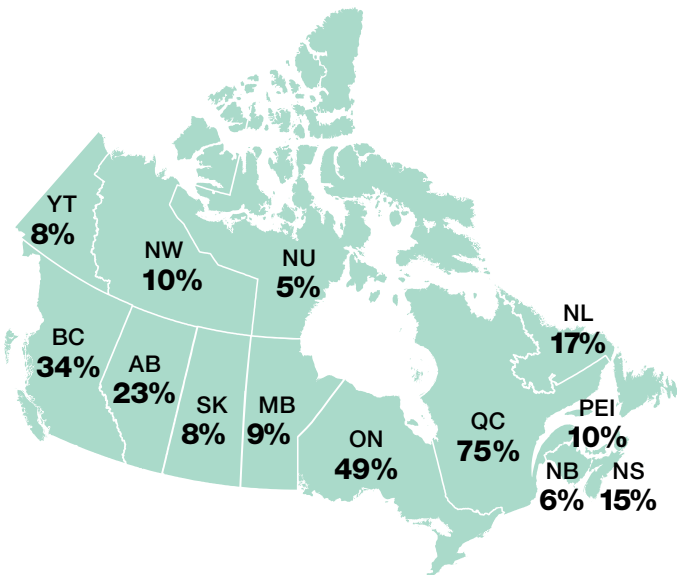
Top Activities of Interest While on Vacation⁴



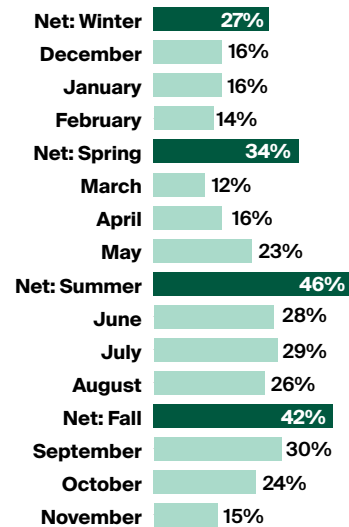
Top 3 Most Important Sustainability Efforts⁴



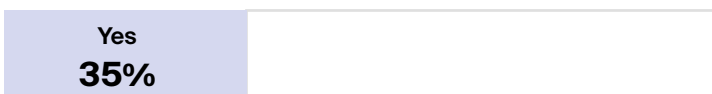
Likelihood to Visit Canadian Regions (Next 2 Years)⁴



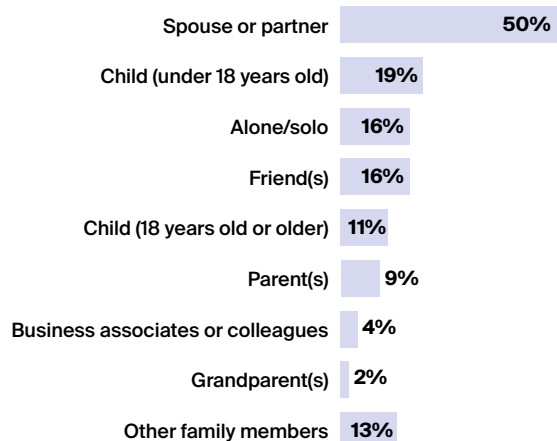
Canada Consideration By Seasons⁴



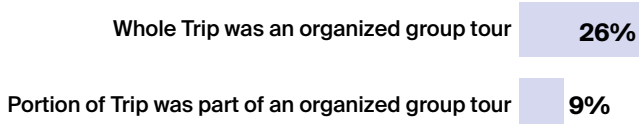
Travel Agent Usage for Most Recent Trip⁴



Travel Party of Recent Trip⁴



Organized Tour Usage for Recent Trip⁴



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