

France was Canada’s third largest source of arrivals in 2024 and remains a key market, particularly for Eastern Canada.

- France has been one of the fastest-recovering European markets for both visitation and spending. Overnight visits will match 2019 levels in 2025, while spending is projected to exceed them by 20%.
- A strengthening Euro in recent years has boosted French travelers’ purchasing power. It’s expected to rise again in 2025, albeit more gradually. The French economy is forecasted to grow modestly in 2025, with stronger growth expected in 2026.
 - Spending by French visitors will rise 13.4% in 2025, reaching 120% of 2019 levels.
 - Visits will grow by 6.9% in 2025, with a further 5.2% increase in 2026.
 - In 2026, Canada is projected to welcome 697,800 French visitors, generating \$1.3 billion in spending.

Spending and visitation levels (% relative to 2019)¹

	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030
Spend	100	12	22	77	98	106	120	131	147	161	176	190
Visitation	100	14	18	70	90	94	100	105	114	122	129	135

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

There is an unprecedented economic opportunity from a growing tourism industry, but there is significant potential for disruption in 2025. To remain resilient, our industry must reinforce that Canada remains open and friendly.

Potential Market Size²

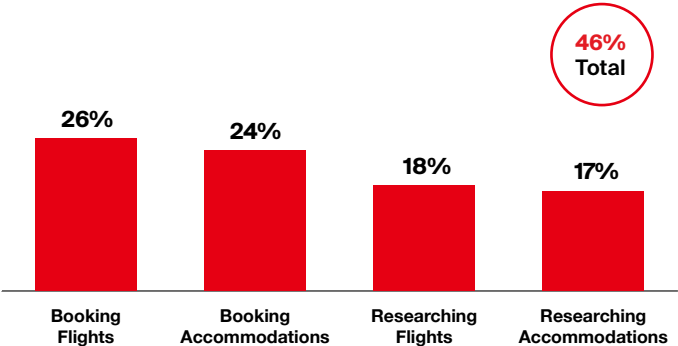


Total potential for long-haul travellers

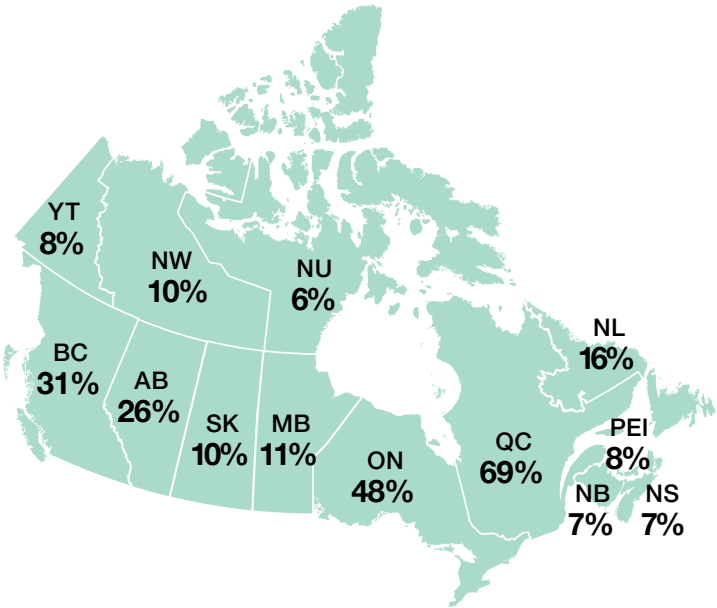


Canada’s immediate potential

Use Travel Agent on Canada Trip²



Likelihood to Visit Canadian Regions (Next 2 Years)




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

¹ Destination Canada Tourism Outlook 2025-2030

² Destination Canada Global Traveller Research Program 2024



In France, there are two key priority segments selected through advanced analysis of their alignment to Canada’s product offerings, their potential economic impact, brand alignment, and their ability to benefit Canadian communities.



France Priority Segment

REFINED GLOBETROTTERS

% Of France Adult Population

11%

% Of France Visitors to Canada

23%

% Of France Spend to Canada

31%

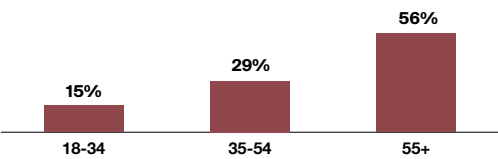
We prioritize travel above all, indulging in world-class destinations, gourmet dining, and exclusive experiences. We are experienced travellers who are always on the lookout for new, unique places to cross of our list.


TOP CANADA ACTIVITIES

- Local Cuisine
- Cultural Experiences & Attractions
- Health and Wellness
- Guided Tours

Type of Travel Trade	Level of Use (compared to rest of market)
Travel Trade for group travel	★★★★★ (Very High)
Travel Trade for non-group travel	★★★★★ (Very High)

AGE





France Priority Segment

OUTDOOR EXPLORERS

% Of France Adult Population

13%

% Of France Visitors to Canada

23%

% Of France Spend to Canada

27%

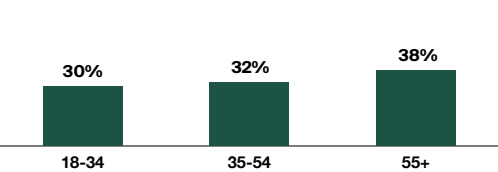
We are nature explorers who crave the thrill of unknown landscapes and overcoming challenges. Adventure travel allows us to grow, learn new skills, and establish personal traditions.

TOP CANADA ACTIVITIES

- Nature Experiences
- High-intensity Sports
- Water / Winter Based Sports
- Casual Sports

Type of Travel Trade	Level of Use (compared to rest of market)
Travel Trade for group travel	★★★★☆ (Average)
Travel Trade for non-group travel	★★★★☆ (Average)

AGE



Source: Destination Canada Traveller Segmentation Program 2024

Note: Segment sizing estimates will differ from those in the Global Traveller Research Program (GTRP), which applies stricter screening criteria—specifically a more narrowly defined long-haul traveller profile.

For further information, please contact:

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