

France Market Highlights – Facts at a Glance

Over 4 million French long-haul pleasure travellers intend to visit Canada in the next two years.

2017 Performance



Arrivals¹

571K (↑5%)



Average Trip Spend²

\$1,428

- Arrivals growth was supported by moderate increases in direct air capacity (up 3% over 2016), increases in the value of the Euro relative to the Canadian dollar and improving European economic conditions.

2018 Forecast



Visitor Forecast²
590K (↑3%)



Spend Forecast²
\$825M (↑4%)



Airline Seat Capacity³
↑12%



Local Currency vs CAD⁴
↑4.6%

Market Insights



Canada is a highly regarded destination to visit outside of Europe and the Mediterranean, ranked 2nd on unaided destination consideration.⁵



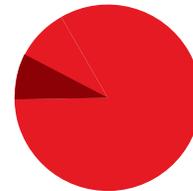
Half of French travellers report having 'very good' to 'excellent' knowledge of holiday opportunities in Canada.⁵



Their knowledge stems primarily from Canada's unique historical and cultural connections with France, with 82% of French considerers saying they are likely to visit Quebec in the next 2 years.⁵

Channel Investment Mix

9%
Travel Trade

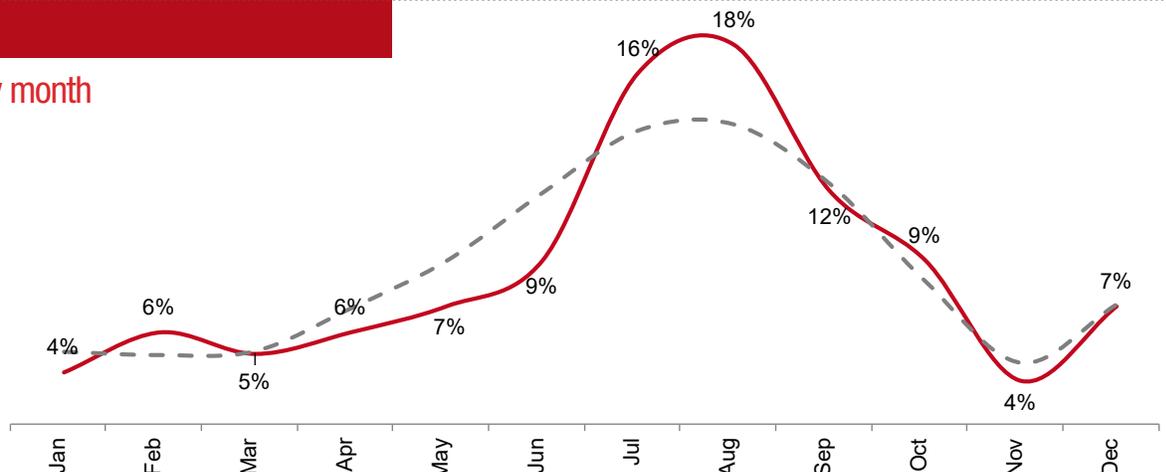


91%
Consumer Direct
& Earned Media

Travel Seasons¹

% of arrivals to Canada by month

— France
- - Destination Canada Market Average



Market Potential⁵



10,391,000

Canada's target market



40%

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



4,156,500

Canada's immediate potential

Top Drivers⁵

The main features that French travellers desire in a destination are...

- 1** Proud to tell people I have visited
- 2** Allows me to de-stress
- 3** Cities are great for exploring and soaking in the atmosphere
- 4** Adventures that challenge me
- 5** Beautiful outdoor scenery and landscapes
- 6** Cities have a lot of great attractions
- 7** Experience things that I can't experience at home
- 8** People are friendly and welcoming
- 9** Winter outdoor activities I would participate in
- 10** Safe place to visit

Target Audiences



Cultural Explorers 25-44

They want to personally grow by freely exploring their passions through travel experiences that transport them from their everyday lives.

Key themes

Inspire with iconic and niche experiences that will challenge travellers' intellectual and cultural perceptions about Canada.



Finding the familiar in Canada

Capitalize on French interest in Canada and Québec, and use it as a gateway to introduce activities and destinations beyond the French speaking zones.



Discovering culturally engaging experiences

Experience distinctively Canadian culture, personalities, and cuisine that can't be found at home.



Uncovering hidden gems

Finding the lesser-visited attractions that will make their experience in Canada unique.



Cultural History Buffs 45-64

Canada

For further information, please contact:

Ms. Sandra Teakle

Account Director

Tourisme Synergique

Paris, France

sandra.teakle@tourisme-synergique.com

¹ Statistics Canada, Frontier Counts, 2017

² Destination Canada Research estimates, using Statistics Canada preliminary Q1-Q3 ITS, Frontier Counts and e311 adjusted data (April 2018)

³ IATA SRS Analyzer Data, March 2018

⁴ Tourism Economics, March 2018

⁵ Global Tourism Watch 2017