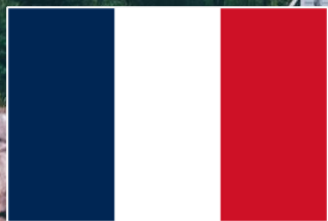


2024 GLOBAL TRAVELLER RESEARCH PROGRAM

FRANCE HIGHLIGHTS REPORT



Canada



St. John's Newfoundland and Labrador



CANADIAN TOURISM DATA
collective

TABLE OF CONTENTS

03

Study Overview:
France Market

13

Indigenous Travel

04

Key Insights

17

Travel Behaviours

05

Market Sizing

22

Most Recent Trip

10

Canada vs.
Competitors



STUDY OVERVIEW: FRANCE MARKET



The Global Traveller Research Program is an annual survey commissioned by Destination Canada and conducted by YouGov Canada. The study fielded online in French, with sample being sourced from a nationally established panel.

The target population are residents aged 18 years and older who have taken a long-haul pleasure trip, where they had stayed at least 4 nights with a minimum of 1 night in paid accommodations in the past 3 years, or plan to take such a trip in the next 2 years.

Highly Engaged Guest (HEG) Audience Definition: Four segments that have been identified by Destination Canada as having higher economic and responsible values that most benefit Canadian communities.



Timing of Fieldwork

**November 19th –
December 3rd 2024**



Geographical Definition for Qualified Trips

**Outside of: Europe,
North Africa and the
Mediterranean**



Sample Distribution

Sample distribution:	National
Highly Engaged Guest (HEG) Audience:	1120
Other travellers:	393
Total sample size:	1513

- In 2023, DC switched research providers to YouGov Canada, with the project being migrated over to YouGov’s proprietary panel.



Key Insights



Canada continues to be a leading international destination among French travellers, with next 2-year immediate potential for Canada being 7.1M



Potential visitors to Canada are more likely to consider a visit during the Summer months, though Quebec is strongly considered during all seasons



French travellers are interested in nature walks, oceanside beaches, and local markets



Travellers to Canada in the past 3 years were mostly on holiday trips, choosing Canada for factors including that it was somewhere they always wanted to visit and safety



There is a high level of interest in Indigenous culture among French travellers: safety and comfort of the destination, authentic and culturally significant experiences would increase their interest in Indigenous cultural experiences

MARKET SIZING



Killarney Provincial Park
Ontario

MARKET SIZING – LONG-HAUL TRAVELLERS

Total Population 18+

51,373,500 (Total FR Population 18+)

28% Took a Long-Haul[^] Pleasure Trip in the Past 3 Years

14,384,500 (Recent Long-Haul Travellers)

32% Plan To Take a Long-Haul Pleasure Trip In Next 2 Years

16,439,500 (Upcoming Long-Haul Travellers)

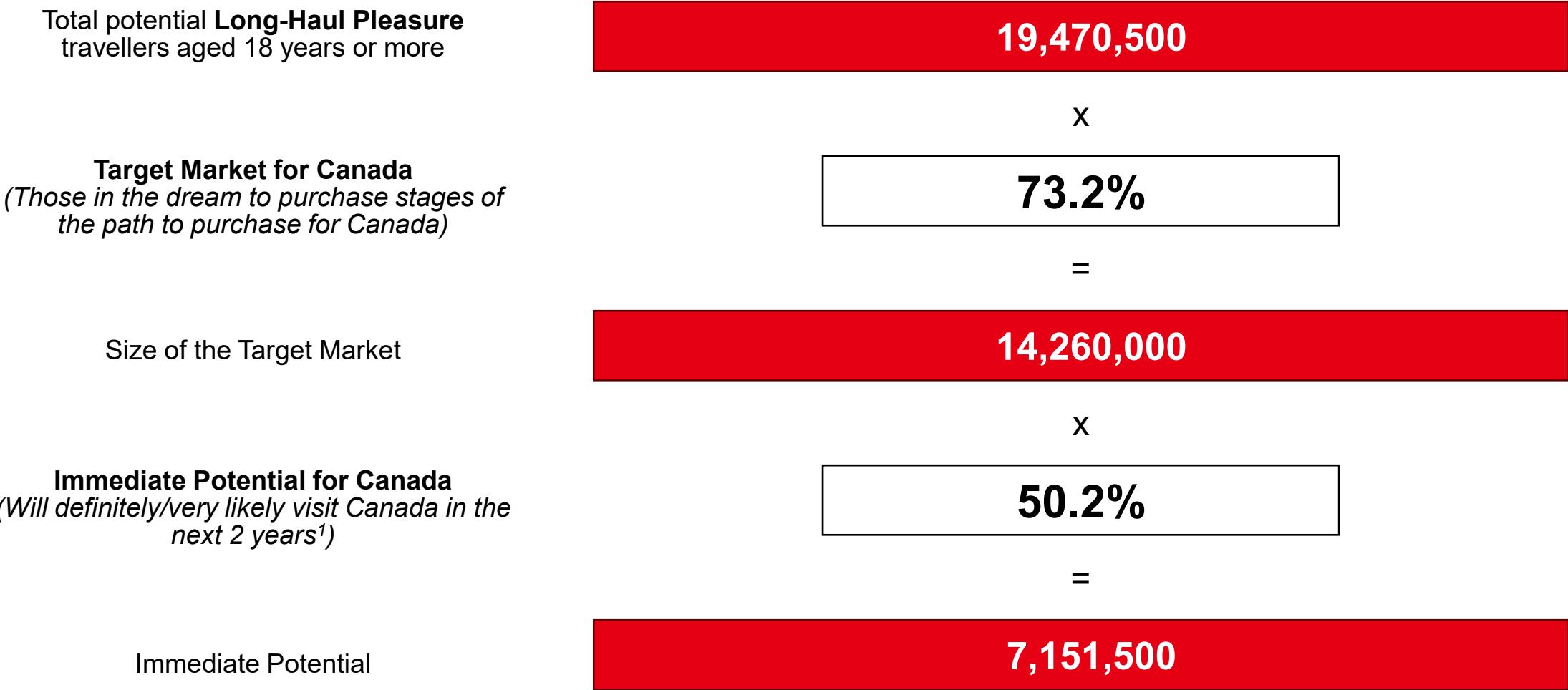
37.9% Incidence Rate

Total long-haul pleasure travel incidence (past 3 years/planned next 2 years)

19,470,500 (Total Long-haul Travellers)

[^] Long-haul = outside of Europe, North Africa and the Mediterranean
Note: Results are from 2023 YouGov Canada Omnibus Survey
Base: General population aged 18+ (n=1047)

POTENTIAL MARKET SIZE FOR CANADA (NEXT 2 YEARS)



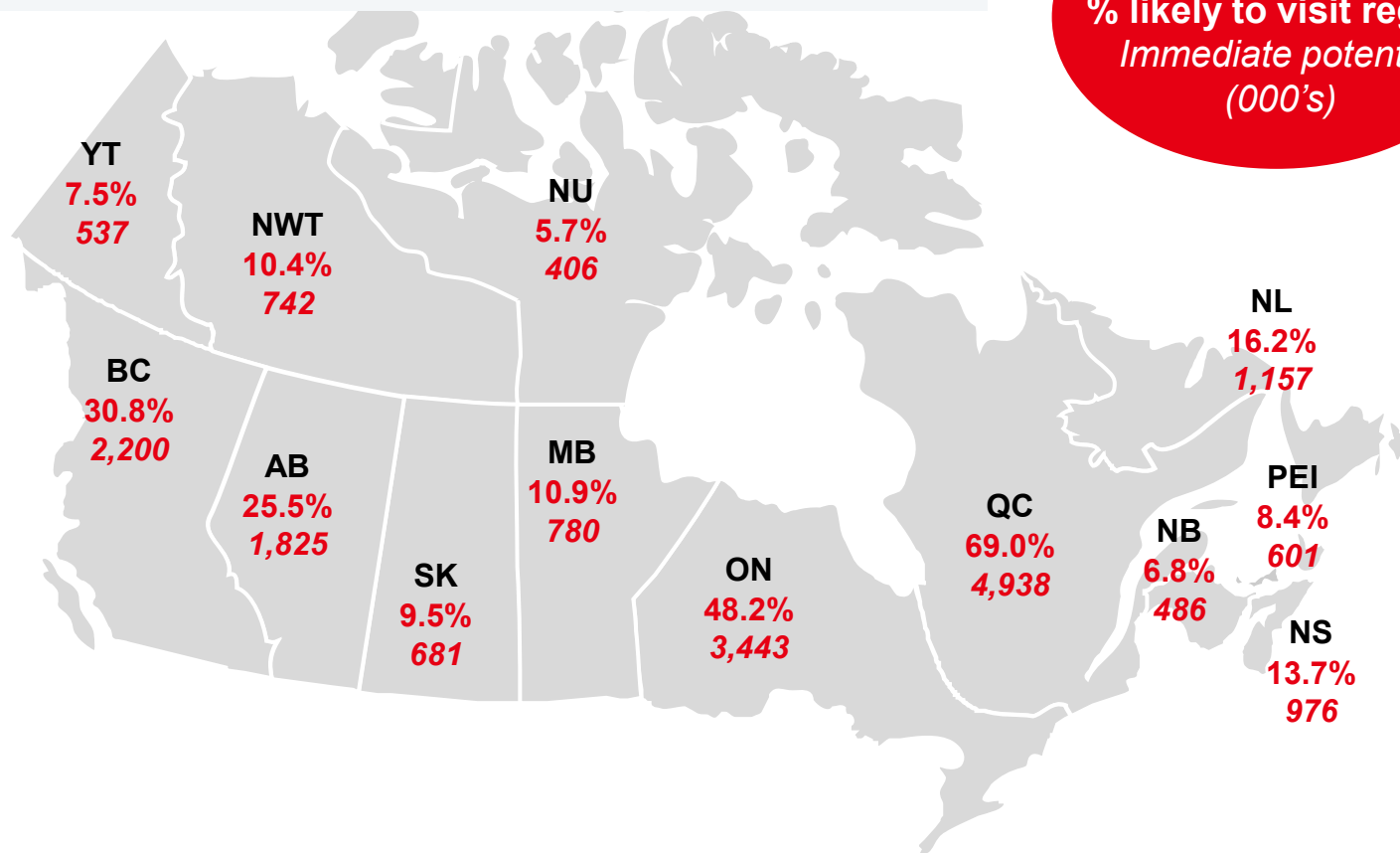
¹ Includes respondents likely to visit Canada for a trip of 1 to 3 nights, or a trip of 4 nights or more.
Base: Target market for Canada = long-haul pleasure travellers (past 3 years or next 2 years) (n=1513); Immediate potential for Canada = dream to purchase stages for P2P for Canada (n=1109)
C1. Which of the following best describes your current situation when thinking about each of the following destinations for a holiday trip? (Select one for each)
E1. Realistically, how likely are you to take a holiday trip to Canada in the next 2 years? (Select one)

POTENTIAL MARKET SIZE BY REGION

Immediate Potential for Canada: **7,151,500**

Key:

% likely to visit region
Immediate potential
(000's)



Quebec has the highest potential to draw in over 4.9 million French travellers over the next 2 years.



Nunavut

Base: Those in the dream to purchase stages of the path to purchase for Canada and definitely/very likely to take a trip to Canada (n=1109)
E2. If you were to take a holiday trip to Canada, in the next 2 years, which of the following Canadian provinces or territories are you likely to visit? (Select all that apply)

TIME OF YEAR INTERESTED IN TAKING A TRIP TO CANADA (NEXT 2 YEARS)

Province/Territory	Winter (Dec, Jan, Feb)	Spring (Mar, Apr, May)	Summer (Jun, Jul, Aug)	Fall (Sept, Oct, Nov)
British Columbia	6%	9%	14%	11%
Alberta	5%	9%	10%	8%
Saskatchewan	2%	5%	4%	3%
Manitoba	2%	5%	5%	4%
Ontario	8%	14%	21%	17%
Quebec	10%	21%	31%	27%
New Brunswick	2%	2%	3%	2%
Nova Scotia	2%	5%	6%	5%
Prince Edward Island	2%	3%	4%	3%
Newfoundland & Labrador	3%	5%	7%	6%
Yukon	1%	3%	4%	3%
Northwest Territories	2%	4%	5%	4%
Nunavut	1%	2%	2%	2%

Base: Those in the dream to purchase stages of the path to purchase for Canada & definitely/likely to take a trip to Canada (n=1109) E3a-m. During what time of year are you considering visiting [PROVINCE]? (Select all that apply)



French travellers show a strong preference for summer, though Quebec is strongly considered for all seasons.

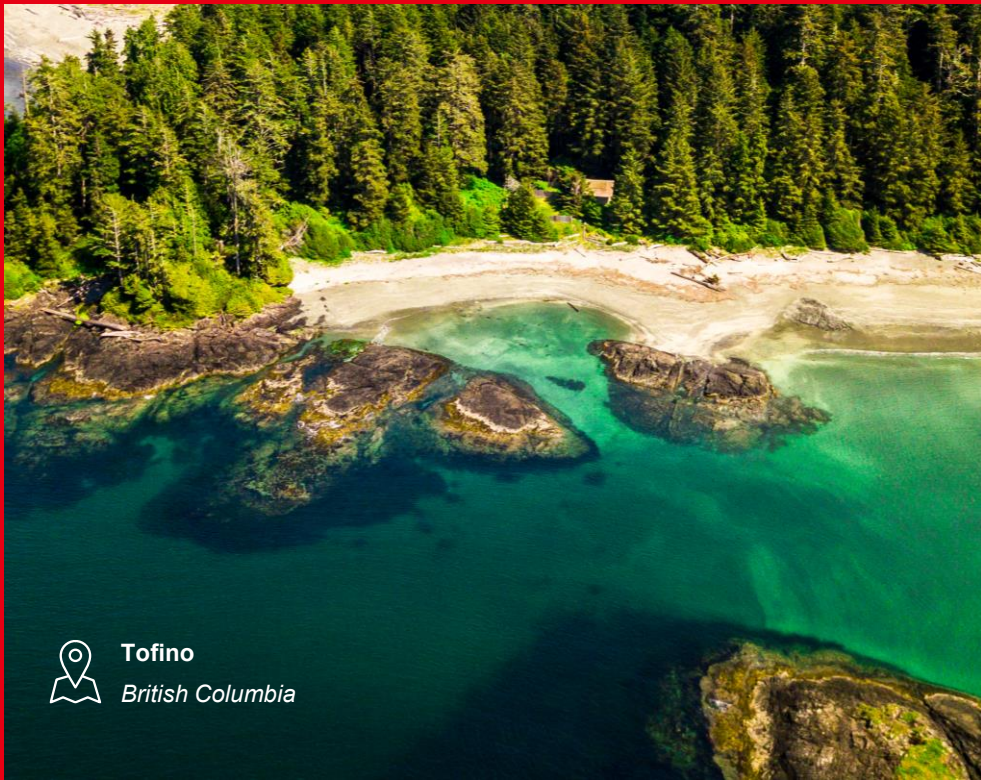
Whitehorse
Yukon


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December 2024

CANADA VS. COMPETITORS

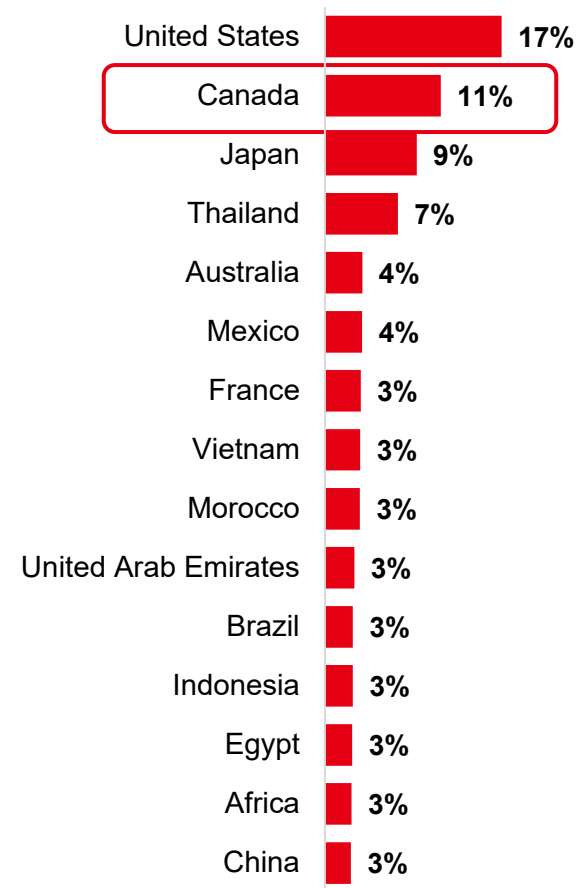




On an unaided basis, French travellers are most likely to consider the United States followed by Canada.



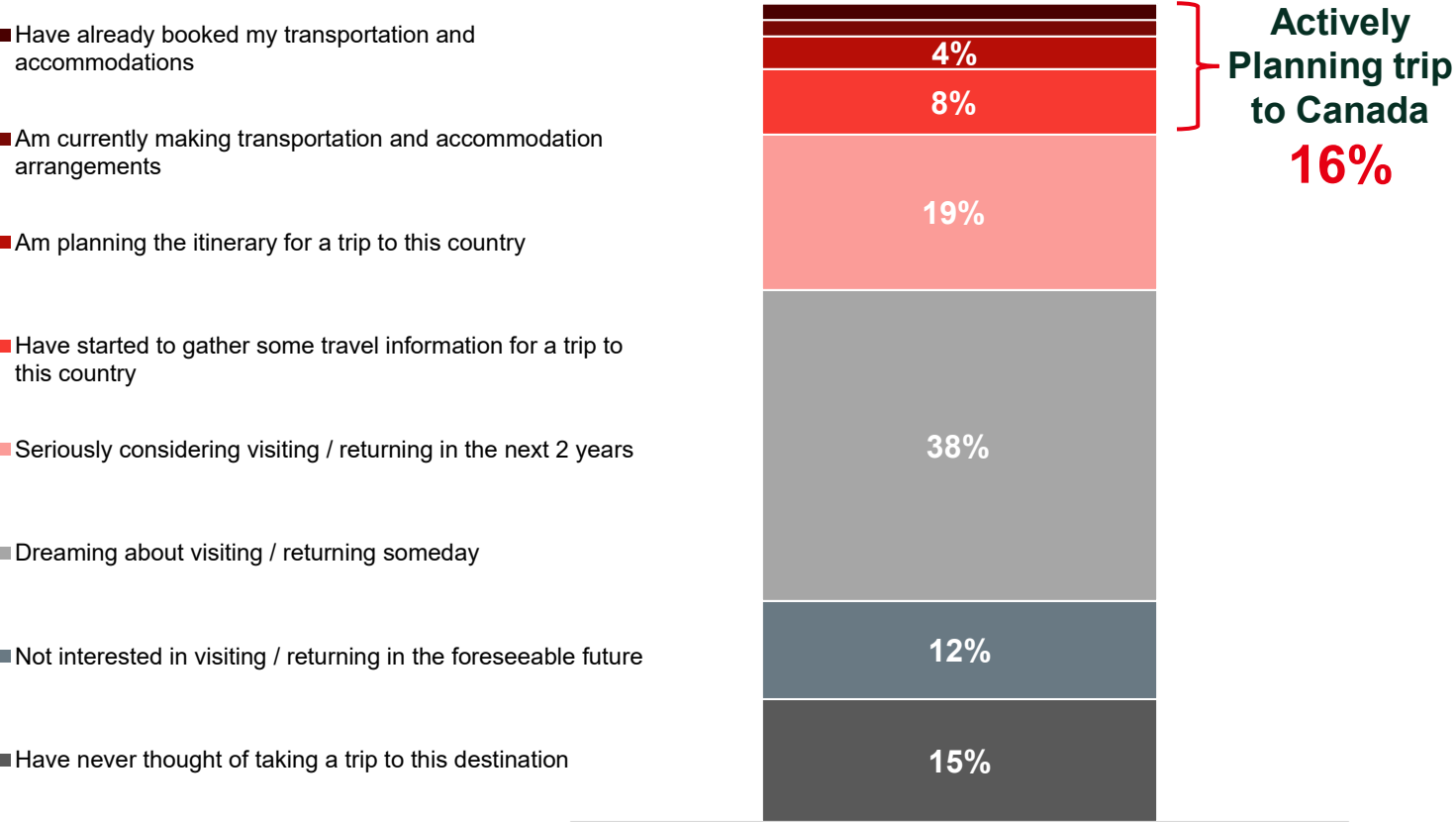
 **Tofino**
British Columbia

UNAIDED DESTINATION CONSIDERATION (NEXT 2 YEARS)¹



¹Roll-up of brand mentions by country (e.g., percentage who said “Canada” or any destination in Canada).  /  = significantly higher/lower result (2024 vs. 2023)
Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1513)
B1. You mentioned that you are likely to take long-haul holiday trip in the next 2 years. Which destinations are you seriously considering? (Please list up to 3 destinations)

STAGE IN THE PURCHASE CYCLE FOR CANADA



Over one in ten French travellers are actively planning a trip to Canada.

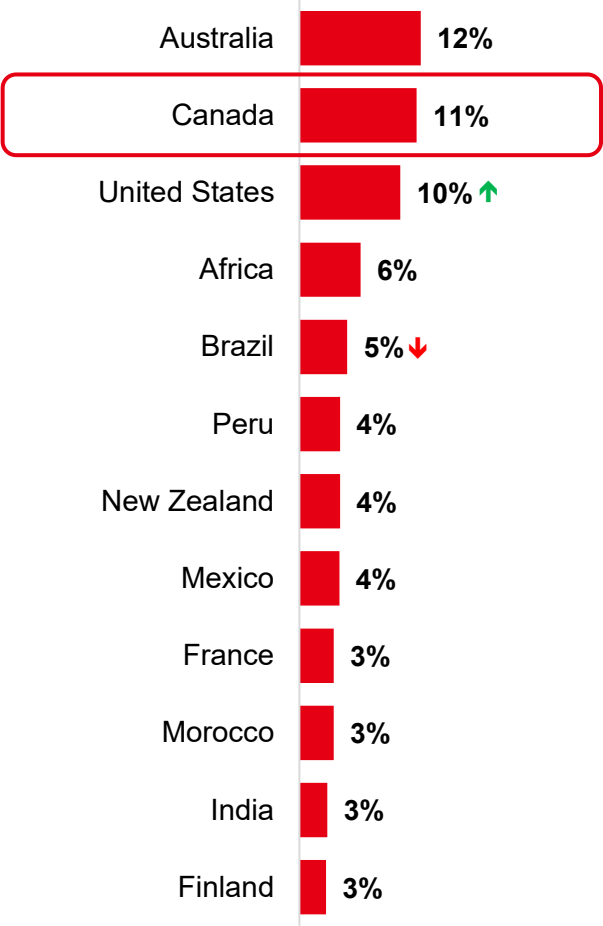
↑ / ↓ = significantly higher/lower result (2024 vs. 2023)

INDIGENOUS TRAVEL



Carcross
Yukon

UNAIDED INDIGENOUS DESTINATION



↑ / ↓ = significantly higher/lower result (2024 vs. 2023)
Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1513)
B4. [DESCRIPTION] What destinations come to mind when thinking about **Indigenous tourism**? (Please list up to 3 destinations. You can mention destinations within or outside of Europe, North Africa and the Mediterranean.)
[DESCRIPTION] Please note: You do not have to limit your responses to destinations you are considering for a holiday trip.



On an unaided basis, Canada ranks second when thinking of Indigenous tourism destinations.

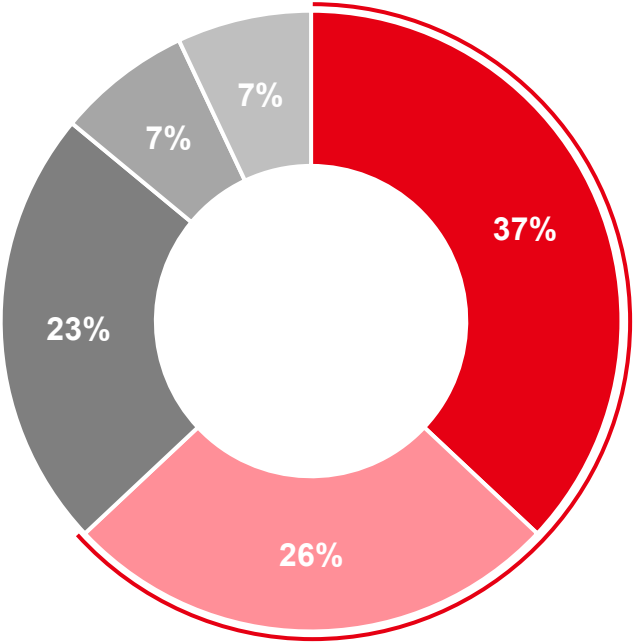


Manitoulin Island
Ontario

INTEREST IN INDIGENOUS DESTINATIONS

Over six in ten French travellers are interested in participating in Indigenous experiences in Canada, with almost four in ten being very interested.

- 5 - Very interested
- 4
- 3
- 2
- 1 - Not at all interested



4 or 5 (out of 5)
63%

Note: respondents were asked either about interest in Indigenous destinations (C10) or factors to drive interest in Indigenous cultural experiences (C11)
 Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=787)
 C10. As you may or may not know, Indigenous peoples are descendants of the original inhabitants of a country or region before people of different cultures or origins arrived. They have unique traditions and ways of life that are often distinct from the larger societies where they live. Indigenous tourism businesses are owned or operated by Indigenous people. How interested are you in participating in Indigenous cultural experiences and tourism activities in the following destinations?

FACTORS TO DRIVE INTEREST IN INDIGENOUS CULTURAL EXPERIENCES

Safety and comfort of the destination, followed by authenticity of the experience, and cultural significance and uniqueness are the most mentioned factors driving interest in Indigenous cultural experiences.



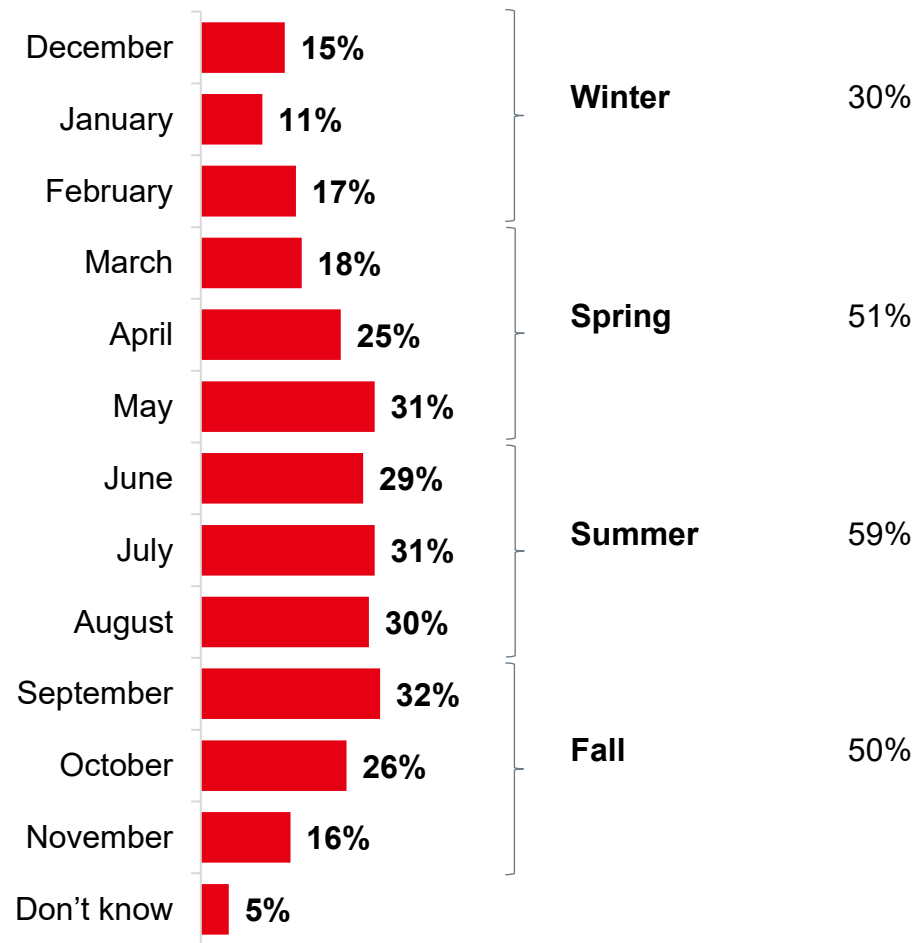
Note: respondents were asked either about interest in Indigenous destinations (C10) or factors to drive interest in Indigenous cultural experiences (C11)
Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=726)
C11. What factors would increase your interest in participating in Indigenous cultural experiences and tourism activities in a destination? (Select up to 3)

TRAVEL BEHAVIOURS



Montreal
Quebec

PREFERRED TIME OF YEAR FOR HOLIDAY TRIPS



Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1513)
D1. In general, what time of year do you typically like to take holiday trips? Select all that apply

Summer is the most preferred time of year for holiday trips, followed by spring and fall, with the most popular months among French travellers being September, July and May.



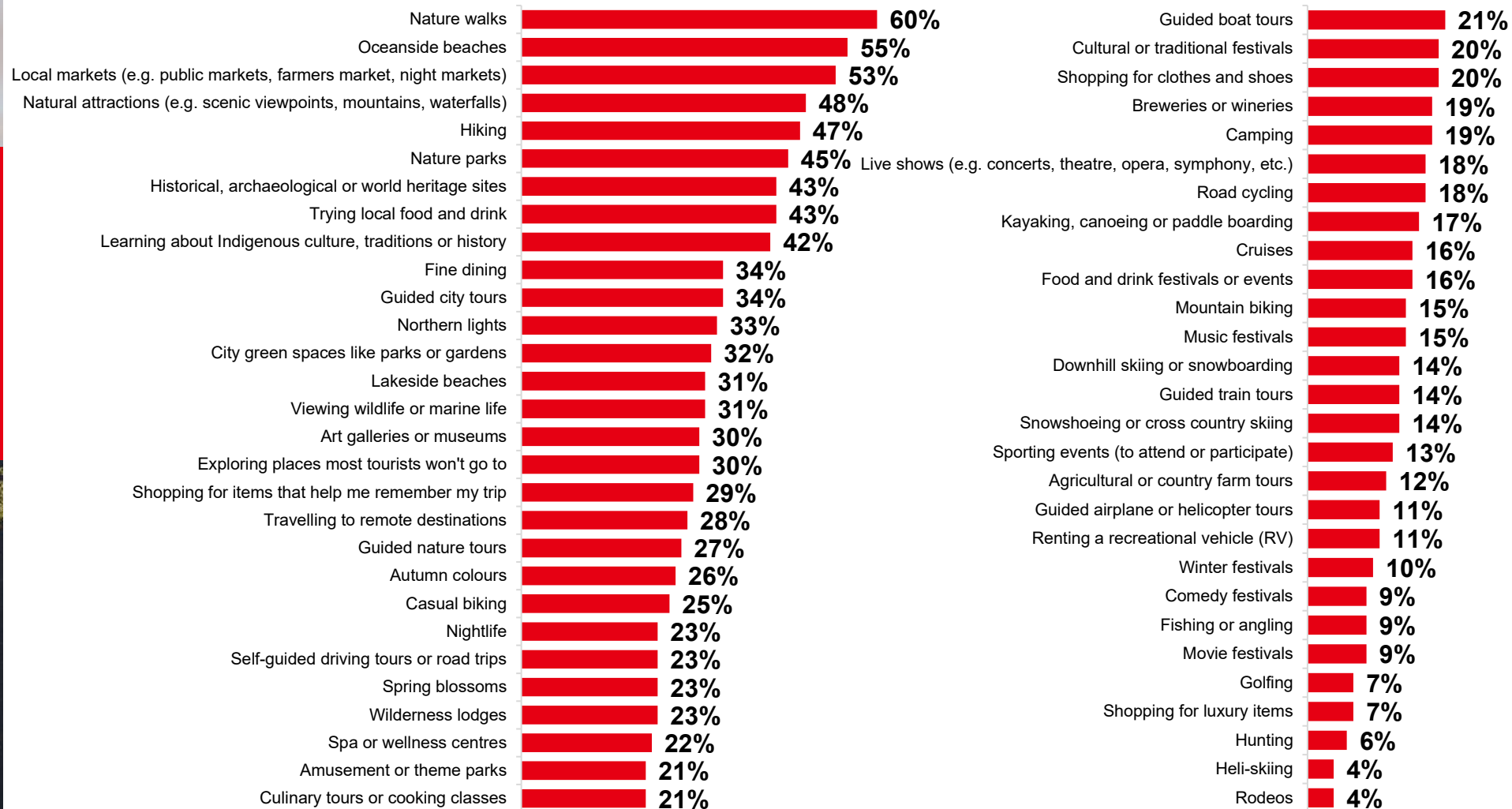
Gros Morne National Park
Newfoundland and Labrador

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GENERAL ACTIVITIES INTERESTED IN (FULL LIST)

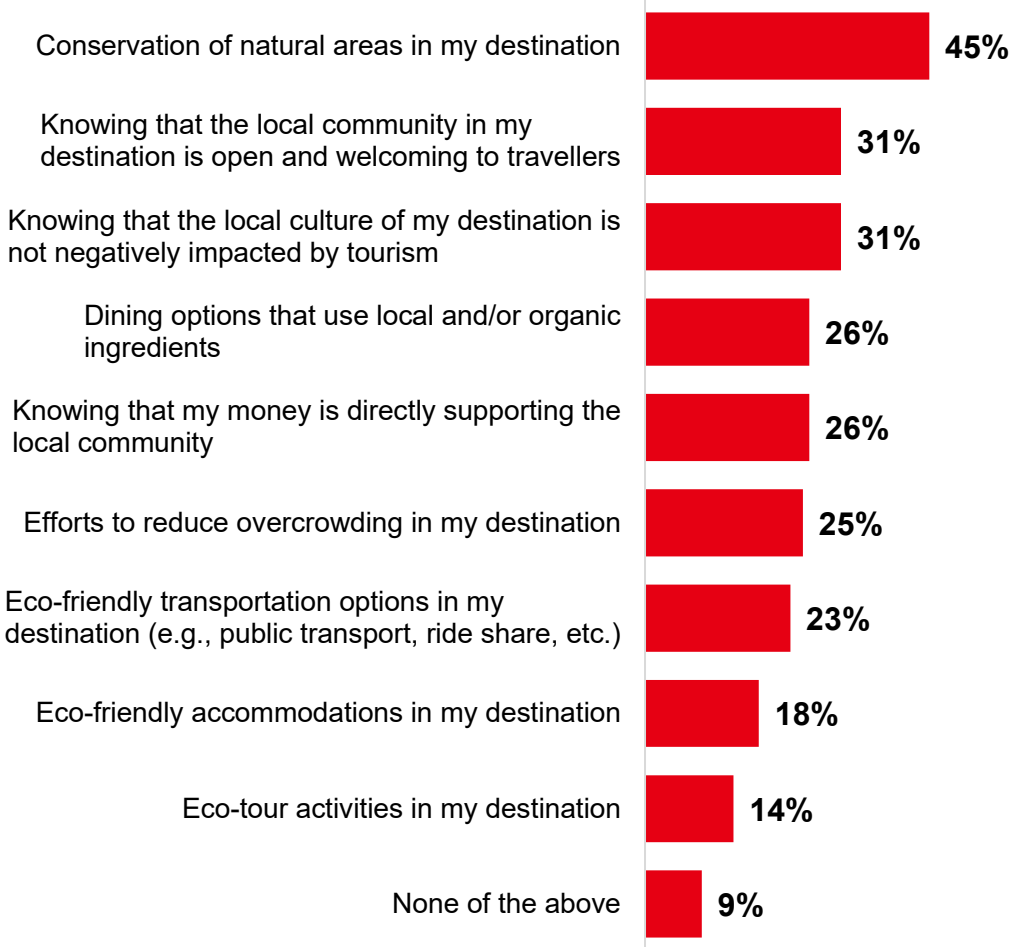
Top activities when on a holiday include nature walks, oceanside beaches, and local markets.



Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1513)
D4. In general, what activities or places are you interested in while on holiday? (Select all that apply)

TOP 3 MOST IMPORTANT SUSTAINABILITY EFFORTS

The most important sustainability efforts are the conservation of natural areas in the destination, knowing the local community is open and welcoming to travellers, and that the local culture of the destination is not negatively impacted by tourism.

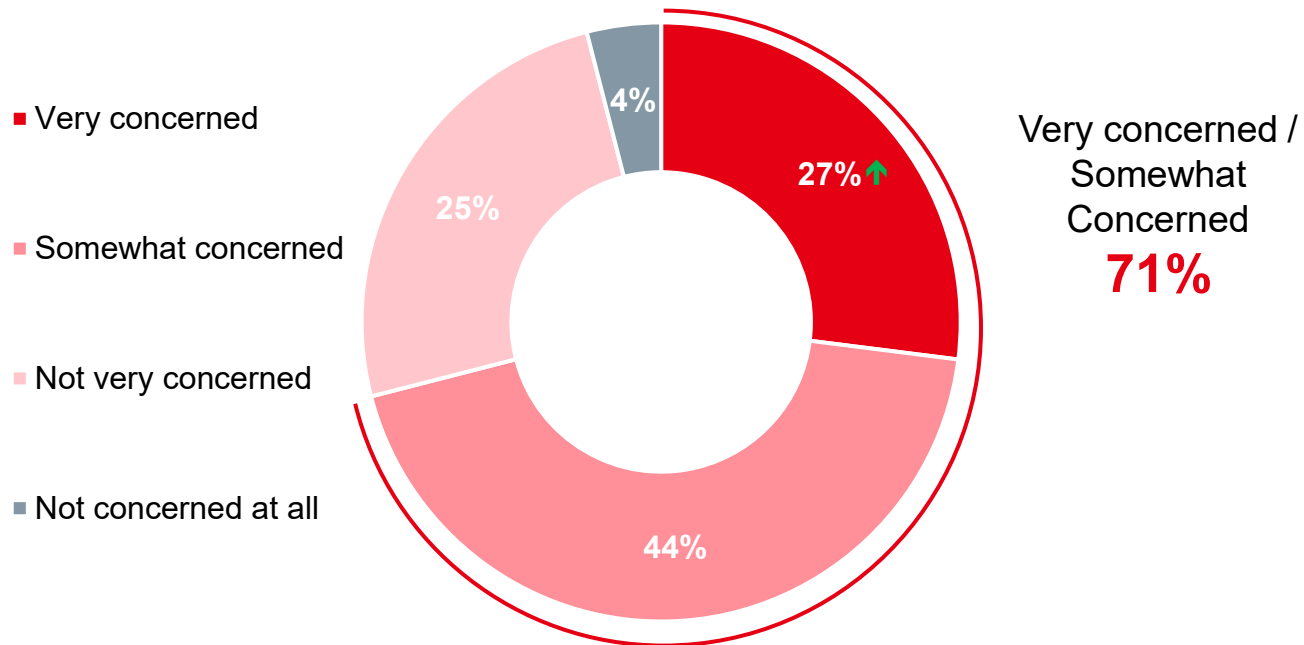


Sustainable Travel Description

Sustainable travel refers to “travel that minimizes any negative impacts on the destination’s environment, economy and society, while making positive contributions to the local people and conserving the destination’s natural and cultural heritage”.

Note: respondents were asked either about most important sustainability efforts (D8) or barriers to sustainable travel (D9)
Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=756)
D8. What are the top 3 sustainability efforts that are most important to you when selecting a holiday destination? Select up to three choices.

IMPACT OF EXTREME WEATHER EVENTS ON TRAVEL PLANS



78% state extreme weather events will **significantly or moderately impact** their travel decisions in the next year

↑ / ↓ = significantly higher/lower result (2024 vs. 2023)

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1513)

D10. As you may or may not be aware, extreme weather events are occurrences of unusually severe weather or climate conditions. They are often short-lived and include blizzards, heat waves, wildfires, tornadoes, hurricanes or tropical cyclones. How concerned are you about extreme weather events affecting your travel plans?

D15. To what extent do you expect extreme weather events to impact your future travel decisions in the next year?

Over seven in ten French travellers are concerned about extreme weather impacting their travel plans, with almost eight in ten stating that extreme weather will impact their future travel decisions.



Canadian Museum of Human Rights, Winnipeg
Manitoba

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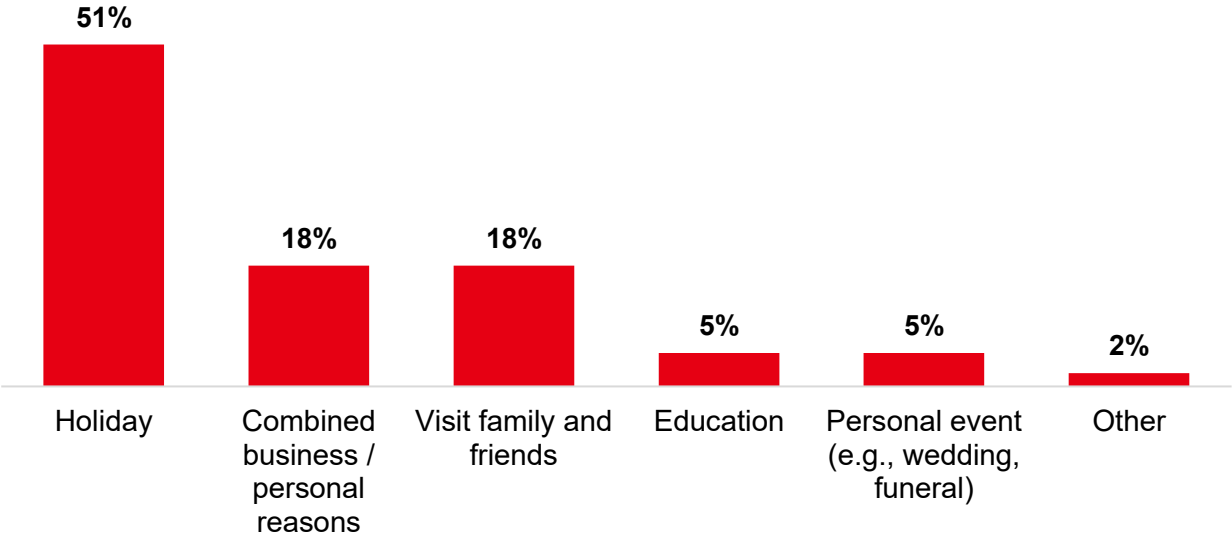


MOST RECENT TRIP



Le Pays de la Sagouine
New Brunswick

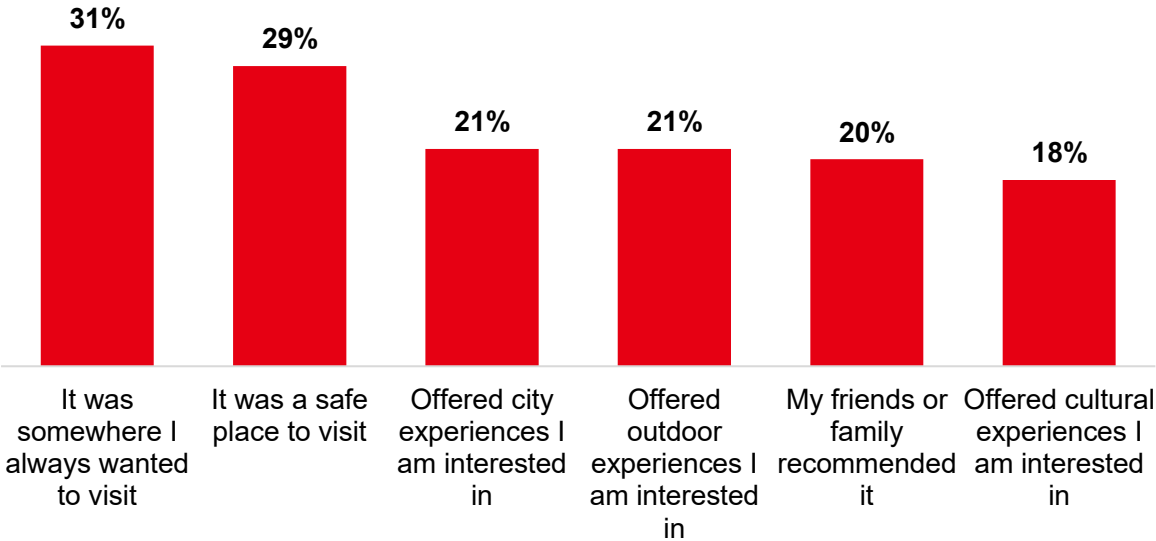
MAIN PURPOSE OF RECENT TRIP



Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination past 3 years (n=206)
F2. What was the main purpose of this trip? (Select one)

Over one half of French travellers to Canada in the past three years were going on a holiday trip.

FACTORS IN CHOOSING DESTINATION FOR RECENT TRIP (TOP 6)

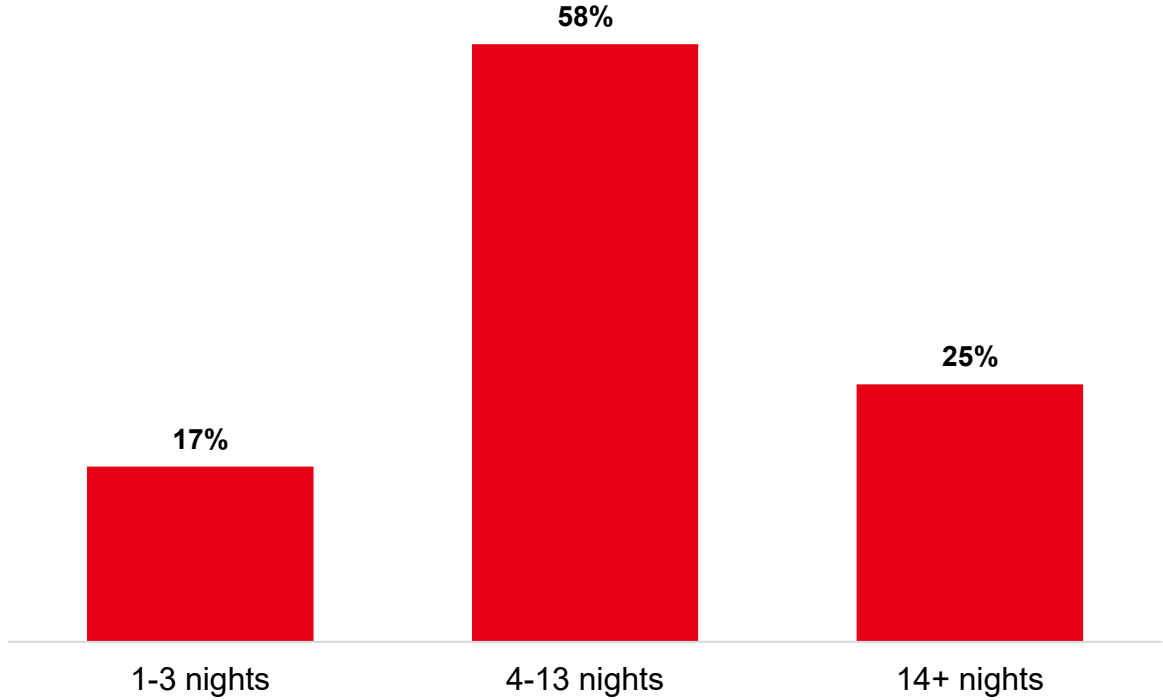


The top factors for choosing Canada for their most recent trip include that it was somewhere they always wanted to visit and safety.

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination past 3 years, Took a holiday (n=105)
F3. Which of the following factored into your choice of destination for this trip? (Select all that apply)

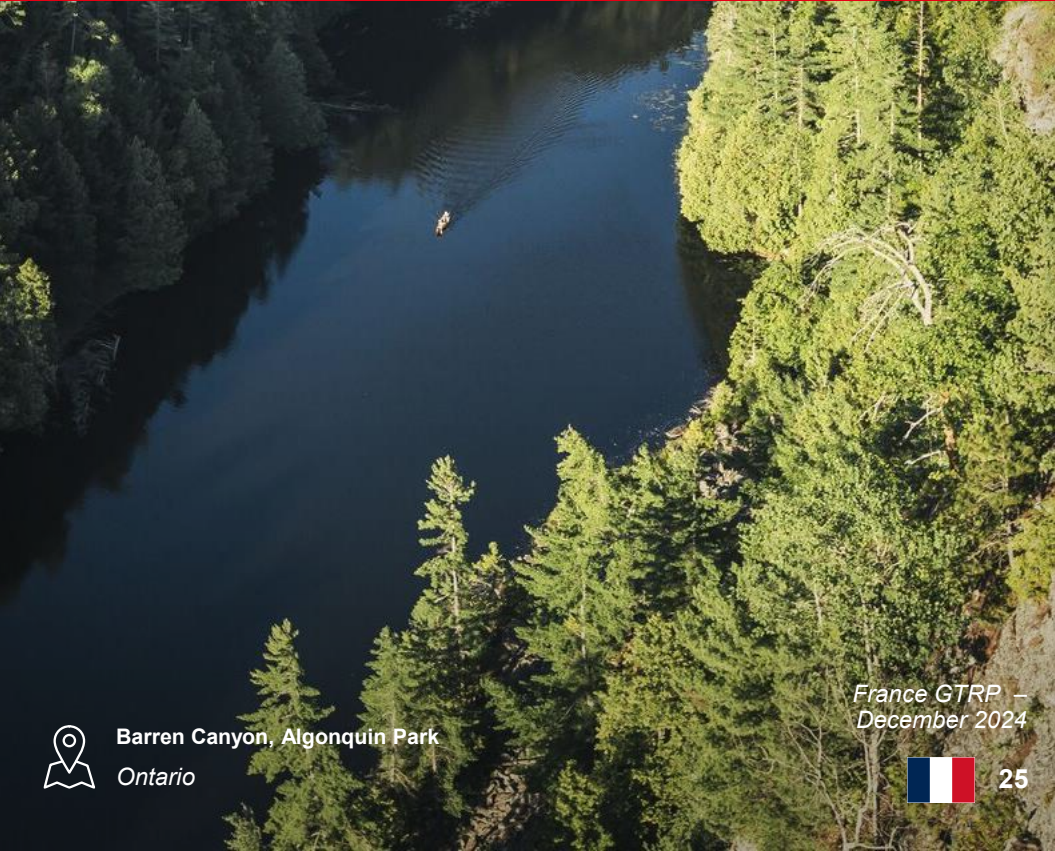


NIGHTS SPENT DURING RECENT TRIP



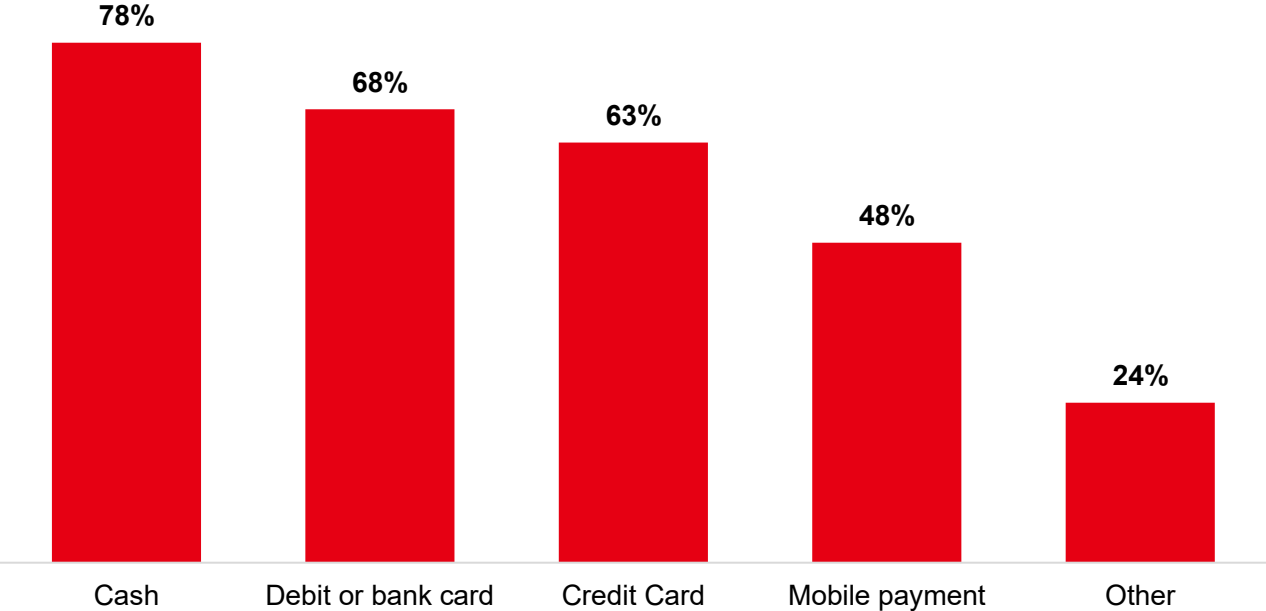
Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination past 3 years (n=206)
F4. How many nights did you spend in this destination?

Almost six in ten French travellers to Canada stayed for 4-13 nights.



Barren Canyon, Algonquin Park
Ontario

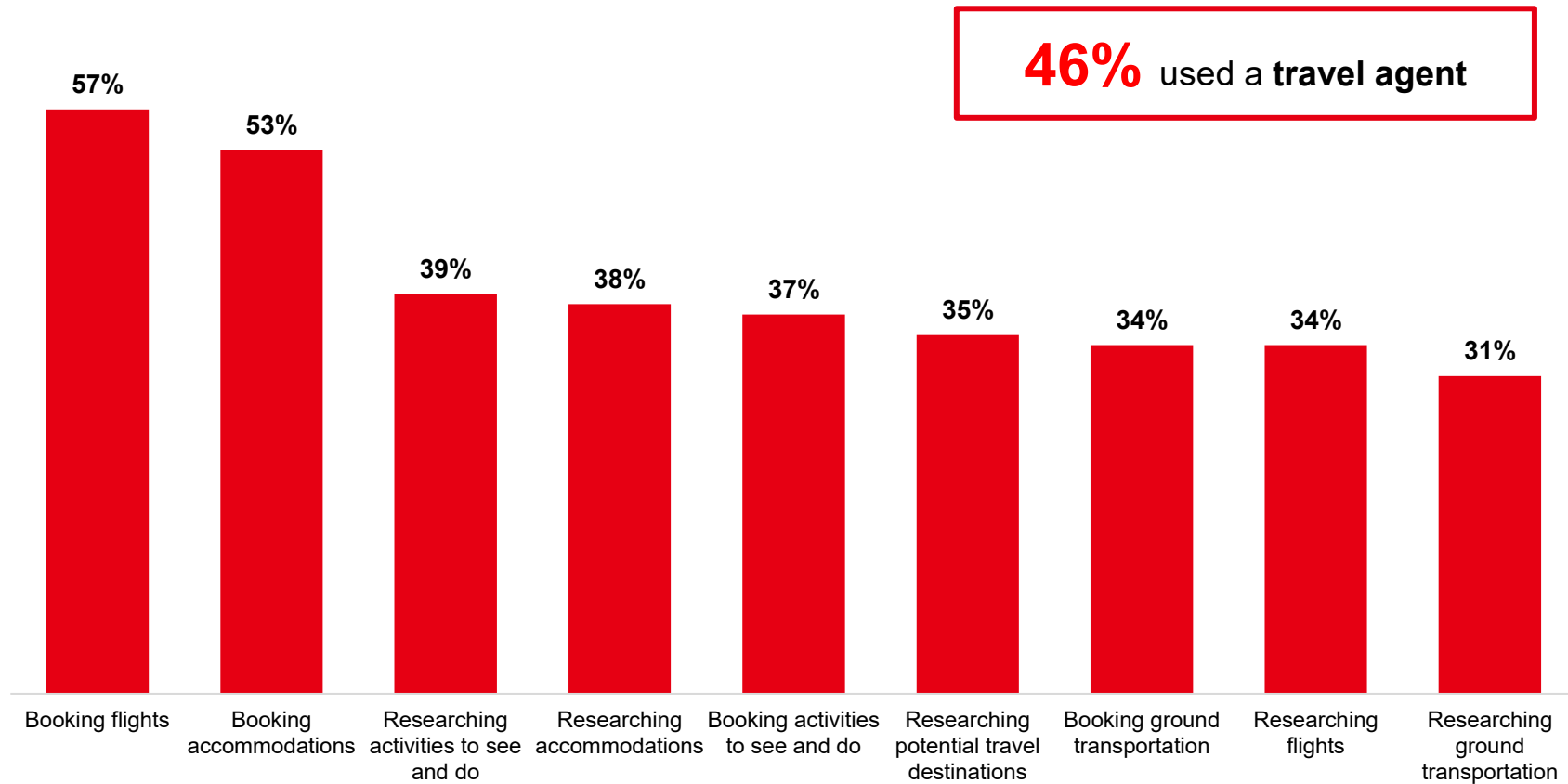
PAYMENT METHODS FOR RECENT TRIP



Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination past 3 years (n=206)
F8. Approximately what percentage of your purchases did you make during your trip with each of the following payment methods? Your best guess is fine. (Enter one number per row. Your total must add to 100%).

The most common payment methods French travellers used for their most recent trip to Canada were cash and debit or bank card.

TRAVEL AGENTS/TOUR OPERATOR USAGE FOR RECENT TRIP (AMONG THOSE WHO USED A TRAVEL AGENT/TOUR OPERATOR)



Over four in ten French travellers used a travel agent, most likely for booking flights or accommodations.

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination past 3 years (n=206), Travelled to any destination past 3 years, Used a Travel Agent/Tour Operator (n=94)

F9. Travel agents offer personalized service to help individuals, groups, and business travellers plan and organize their travel schedules, from purchasing tour packages to booking flights and hotels. Examples of travel agents include Expedia or Opodo, they do not include online booking engines like Expedia or Opodo. Did you use a travel agent or tour operator to help you research or book your trip? (Select one)

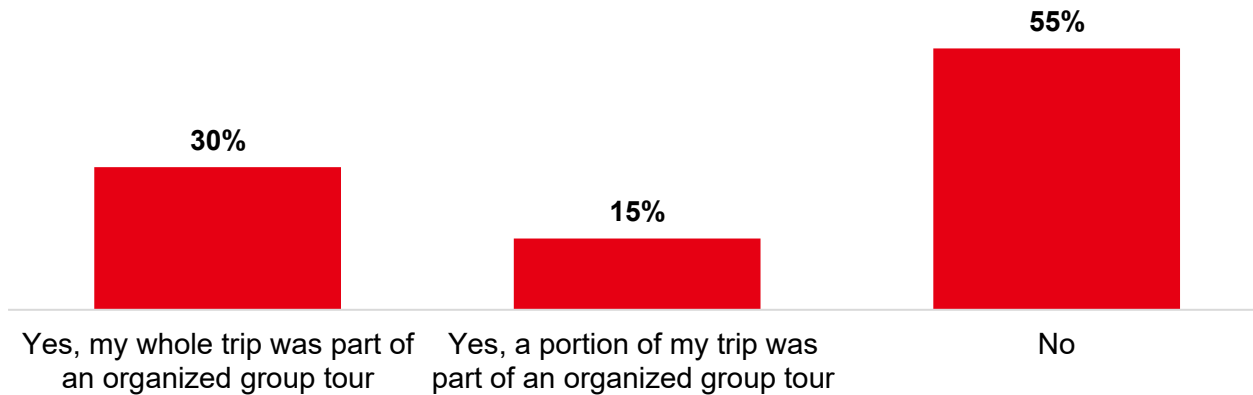
F10. Which of the following did a travel agent or tour operator help you with?

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December 2024

Twin Falls Lodge
Saskatchewan



ORGANIZED GROUP TOUR FOR RECENT TRIP



Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination past 3 years (n=206)
F11. An organized group tour consists of a package where any combination of accommodation, transportation, food and/or activities are included as a multi-day itinerary. Did you travel as a part of an organized group tour on this trip?

Three in ten travellers to Canada in the past three years used an organized group tour for their whole trip, and over one in ten used one for a portion of their trip.



Saskatoon

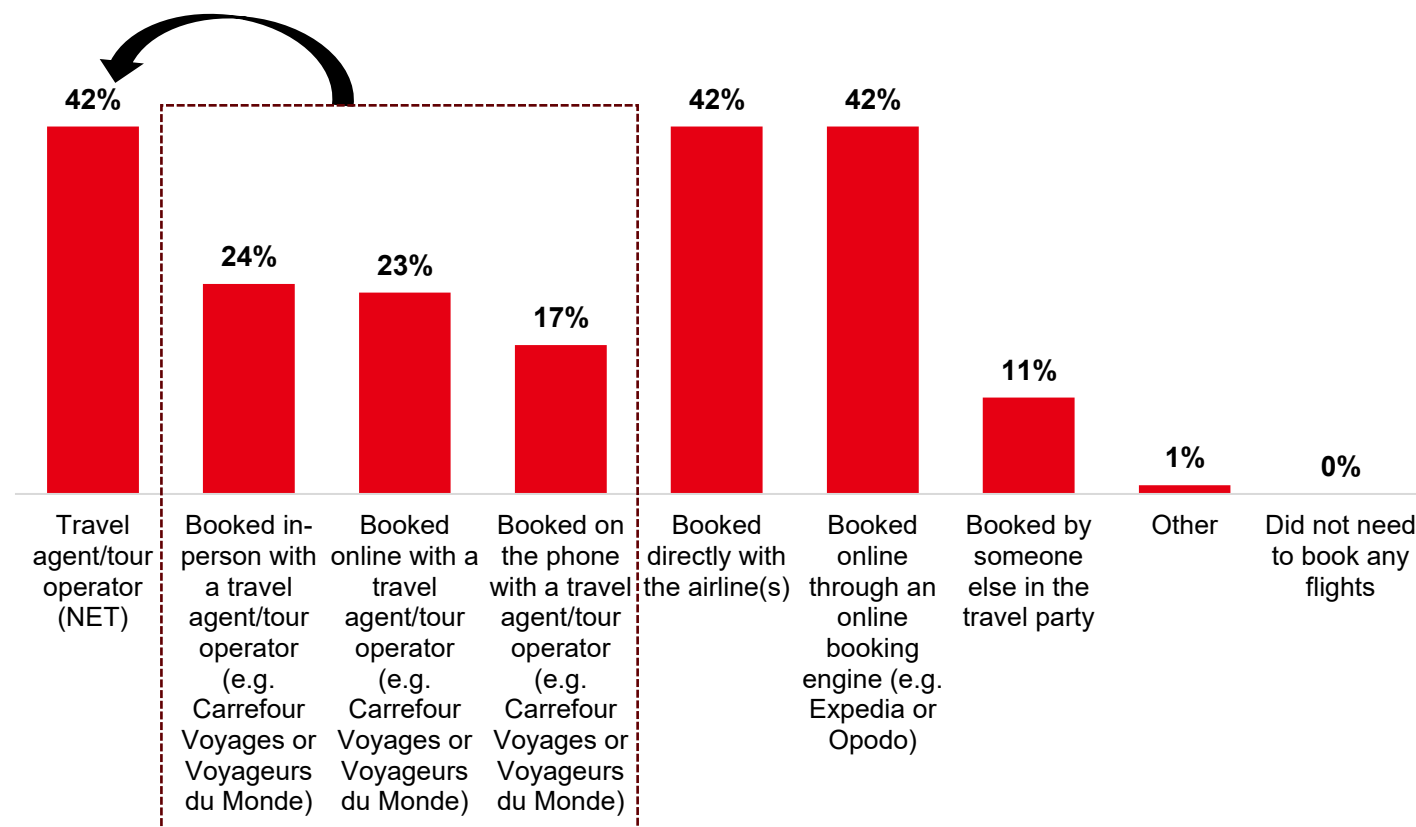
Saskatchewan

France GTRP –
December 2024



28

BOOKING FLIGHTS FOR RECENT TRIP



Booking flights through a travel agent or tour operator, directly with the airline, or through an online booking engine were the most popular ways to book flights.

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination past 3 years (n=206)
F12. How did you book your flight for this trip? (Select all that apply)

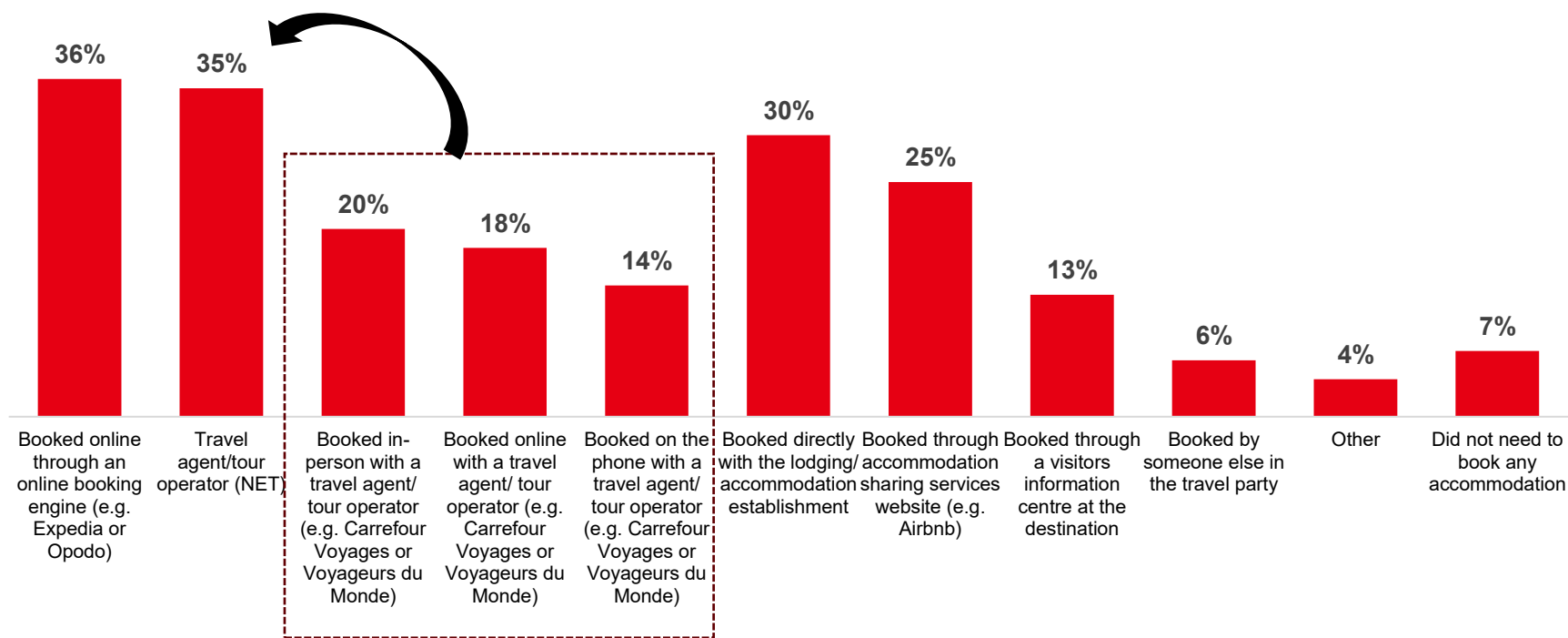


Montmorency Falls Park, Quebec City
Quebec

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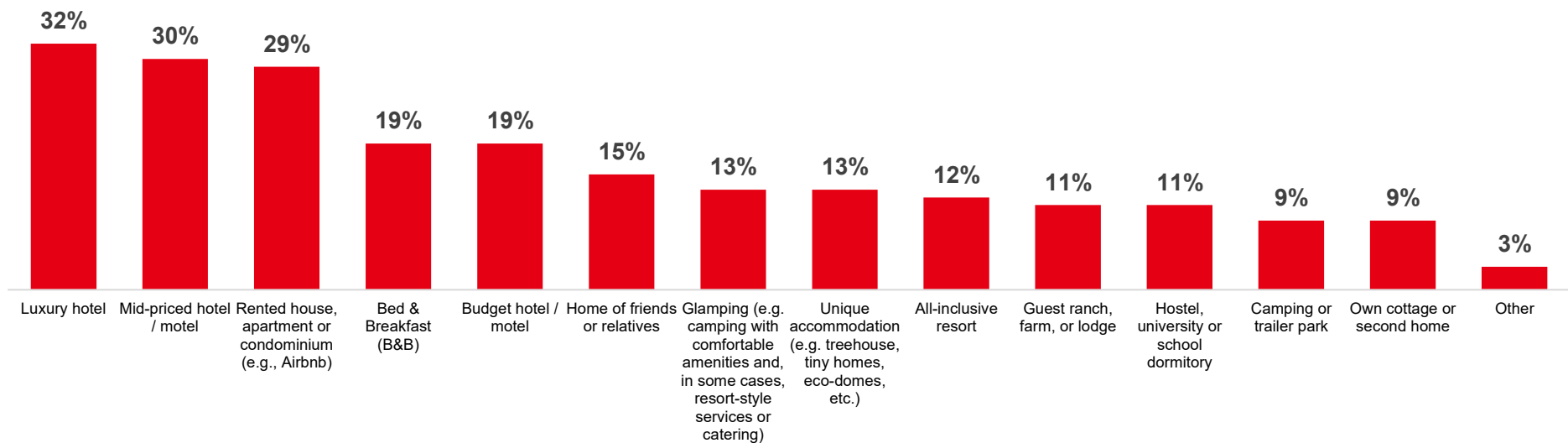
BOOKING ACCOMMODATIONS FOR RECENT TRIP



Over one third of recent travellers to Canada booked their accommodations through an online booking engine or through a travel agent or tour operator.

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to Canada past 3 years (n=206)
F13. How did you book your accommodation for this trip? (Select all that apply)

TYPE OF ACCOMMODATIONS FOR RECENT TRIP



Over one third of French travellers visiting Canada stayed at a luxury hotel, while another three in ten stayed a mid-priced hotel or motel, or a short-term rental.



Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to Canada past 3 years, Booked Accommodations (n=192)
F14. Which type of accommodation did you stay in during this trip? (Select all that apply)

THANK YOU

For any questions, please reach out to research@destinationcanada.com

