

2025 GLOBAL TRAVELLER RESEARCH PROGRAM

FRANCE HIGHLIGHTS REPORT



Canada



Saint-Édouard-de-Kent New Brunswick



CANADIAN TOURISM DATA
COLLECTIVE

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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	Geographical Definition for Qualified Trips	Sample Distribution
December 1 st – 16 th 2025	Outside of: Europe, North Africa and the Mediterranean	Sample distribution: National
		Highly Engaged Guest (HEG) Audience: 1134
		Other travellers: 372
		Total sample size: 1506

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





Consideration for Canada continues to be strong among French travellers, with the next 2-year immediate potential for Canada being 6.8M. The current geopolitical climate is also creating a tailwind, with 38% stating they are more likely to visit Canada as a result.



Quebec and Ontario account for the largest number of potential visitors with summer, fall and spring being the most popular times to visit both.



French travellers are interested in a wide variety of activities ranging from oceanside beaches, nature walks natural attractions, historical sites, local markets and learning about Indigenous culture.



On an unaided basis, Canada is a leading Indigenous tourism destination among French travellers, ranking second behind Australia, with growing interest driven by demand for safe, authentic experiences in natural settings.



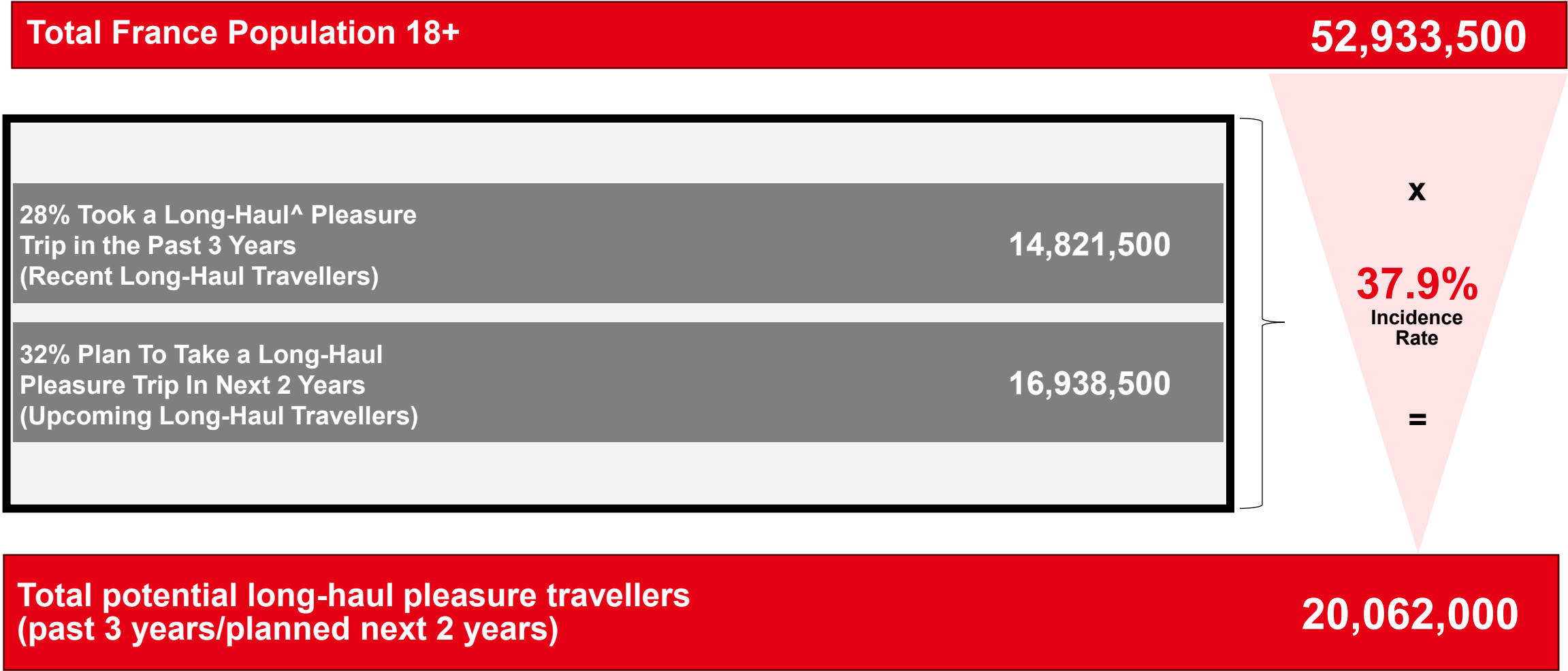
AI is widely used in travel planning, especially among younger travellers, though over four in ten still rely on travel agents for booking. Online booking engines and direct bookings remain popular, with rental homes used as often as mid-tier hotels.

MARKET SIZING



Killarney Provincial Park
Ontario

MARKET SIZING – 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)

Total potential **Long-Haul Pleasure** travellers aged 18 years or more

20,062,000

Target Market for Canada
(Those in the dream to purchase stages of the path to purchase for Canada)

X

75.6%

=

Size of the Target Market

15,159,000

Immediate Potential for Canada
(Will definitely/very likely visit Canada in the next 2 years¹)

X

45.1% ↓

=

Immediate Potential

6,843,000

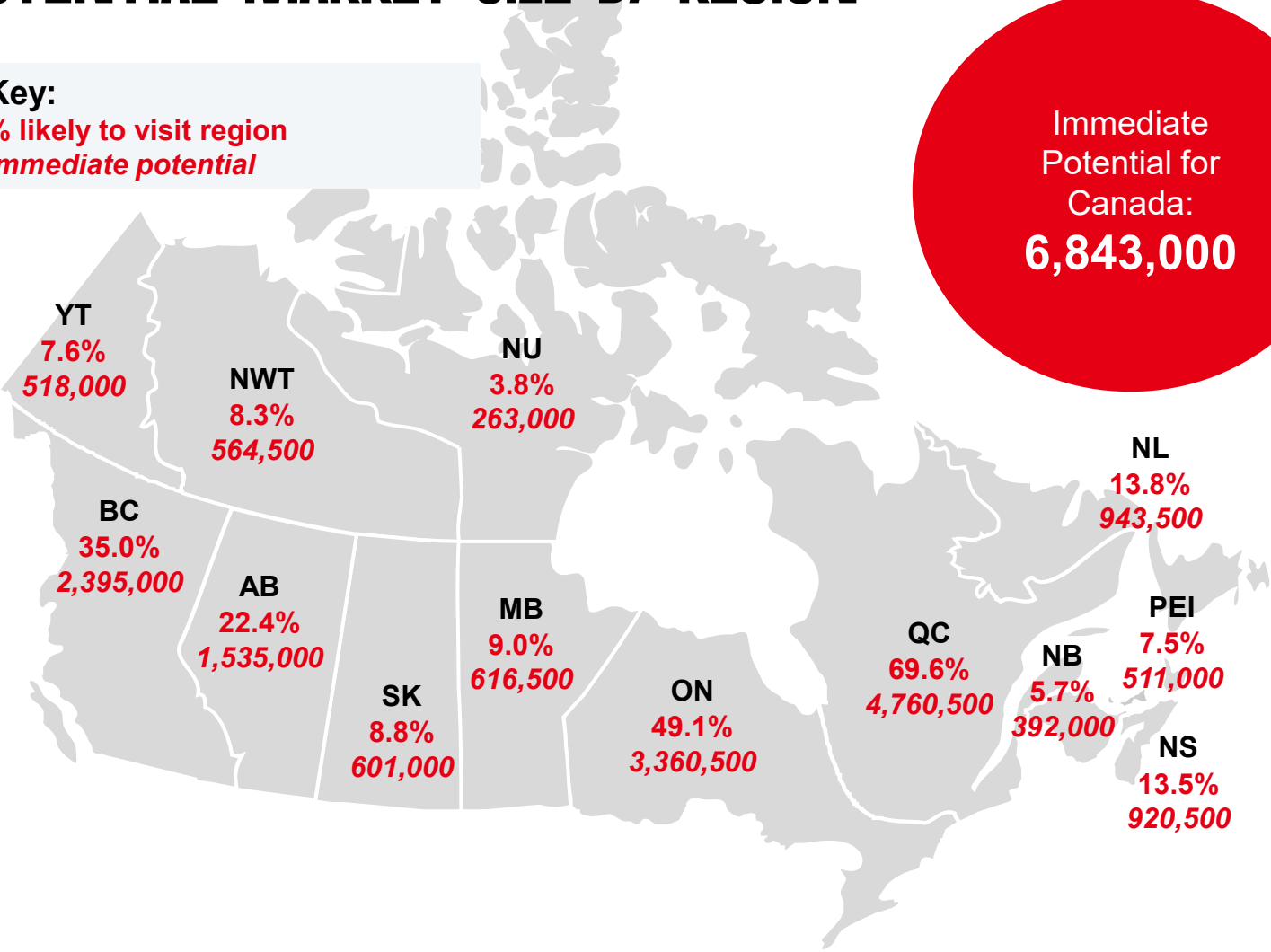
¹ Includes respondents likely to visit Canada for a trip of 1 to 3 nights, or a trip of 4 nights or more.
Base: Target market for Canada = long-haul pleasure travellers (past 3 years or next 2 years) (n=1506); Immediate potential for Canada = dream to purchase stages for P2P for Canada (n=1133)
C1. Which 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)

Quebec and Ontario have the potential to draw in at least 3.3 million French travellers each over the next 2 years.

POTENTIAL MARKET SIZE BY REGION

Key:
% likely to visit region
Immediate potential

Immediate Potential for Canada:
6,843,000



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=1133)
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)



Nunavut

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%	12%
Alberta	3%	8%	9%	9%
Saskatchewan	2%	4%	4%	1%
Manitoba	2%	3%	5%	3%
Ontario	6%	14%	19%	19%
Quebec	10%	20%	28%	27%
New Brunswick	1%	2%	2%	2%
Nova Scotia	2%	5%	5%	6%
Prince Edward Island	2%	2%	2%	3%
Newfoundland & Labrador	2%	4%	6%	5%
Yukon	2%	2%	3%	3%
Northwest Territories	2%	4%	3%	3%
Nunavut	1%	1%	1%	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=1133) E3a-m. During what time of year are you considering visiting [PROVINCE]? (Select all that apply)



French travellers are most likely to travel to Canada in the summer months, while fall and spring are also popular.



Whitehorse
Yukon

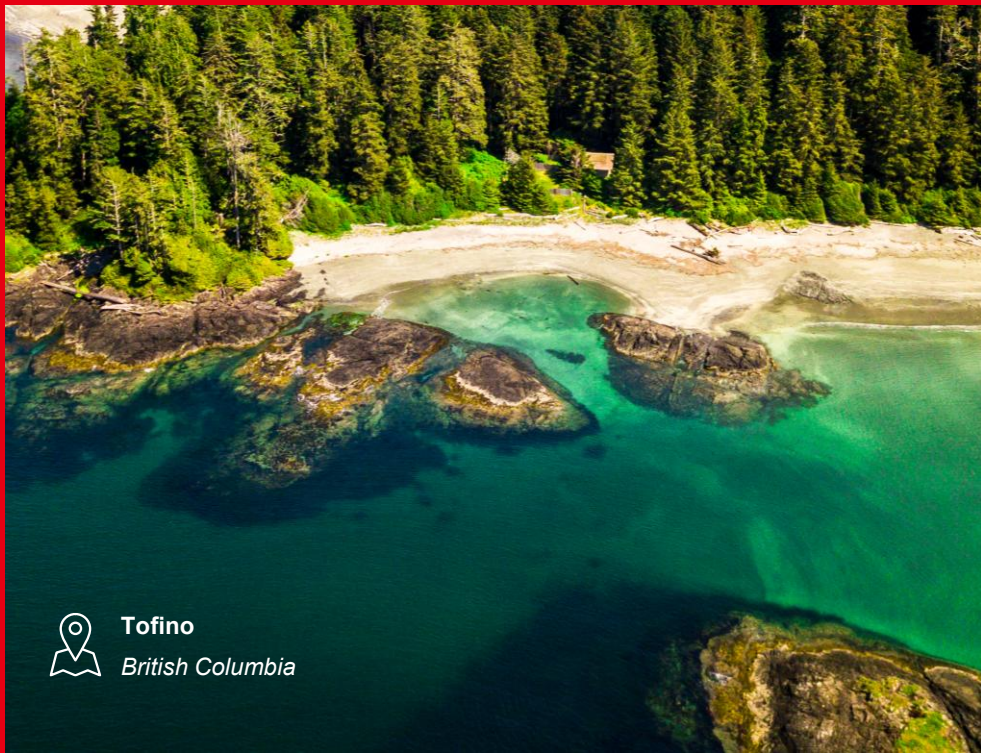
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December 2025



CONSIDERING CANADA AS A TRAVEL DESTINATION

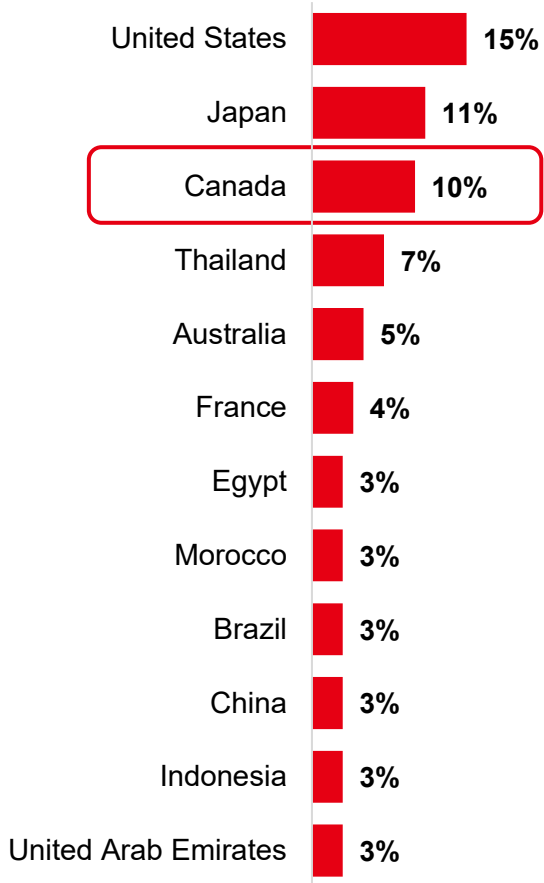


On an unaided basis, Canada ranks third as a destination French travellers are considering, behind the US and Japan.



 **Tofino**
British Columbia

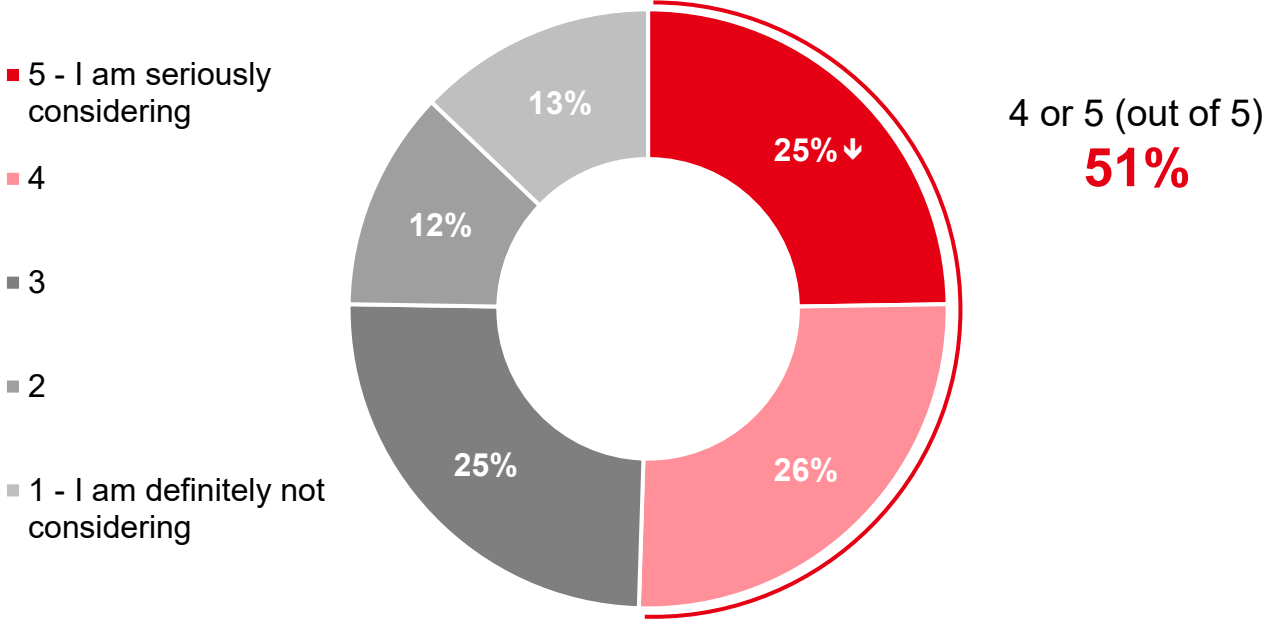
UNAIDED DESTINATION CONSIDERATION (NEXT 2 YEARS)¹



¹ Roll-up of brand mentions by country (e.g., percentage who said “Canada” or any destination in Canada).
Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1506)
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)

↑ / ↓ = significantly higher/lower result (2025 vs. 2024)

AIDED CONSIDERATION FOR CANADA (NEXT 2 YEARS)



Just over half of French travellers have strong consideration for Canada despite fewer travellers seriously considering a trip in the next 2 years.

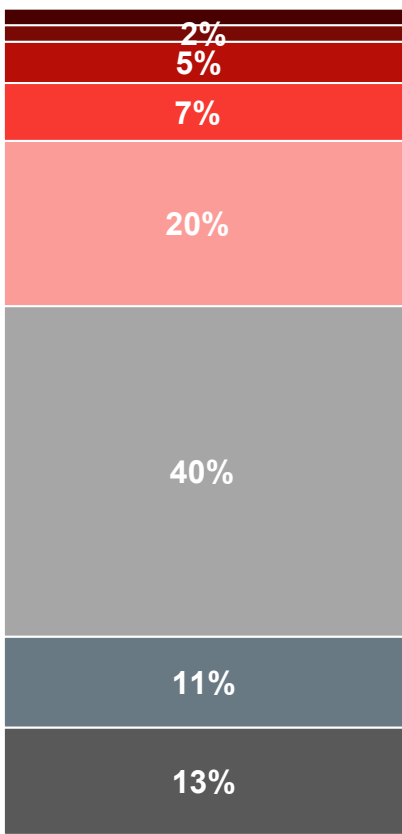
↑ / ↓ = significantly higher/lower result (2025 vs. 2024)

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1506)

C2. You may have already mentioned this before, but would you consider visiting each of the following destinations in the next 2 years? Please use a 5-point scale where 1 means 'I am definitely not considering' and 5 means 'I am seriously considering'.

STAGE IN THE PURCHASE CYCLE FOR CANADA

- Have already booked my transportation and accommodations
- Am currently making transportation and accommodation arrangements
- Am planning the itinerary for a trip to this country
- Have started to gather some travel information for a trip to this country
- Seriously considering visiting / returning in the next 2 years
- Dreaming about visiting / returning someday
- Not interested in visiting / returning in the foreseeable future
- Have never thought of taking a trip to this destination



Actively Planning trip to Canada
15%

Consistent with 2024, over one in ten French travellers are actively planning a trip to Canada.



↑ / ↓ = significantly higher/lower result (2025 vs. 2024)

Note: all respondents evaluated Canada plus 3 randomly selected countries from the competitive set.
Base: Long-haul pleasure travellers (past 3 years or next 2 years), Evaluated Canada (n=1506)
C1. Which of the following best describes your current situation when thinking about each of the following destinations for a vacation trip? (Select one for each)

Lake Louise
Alberta

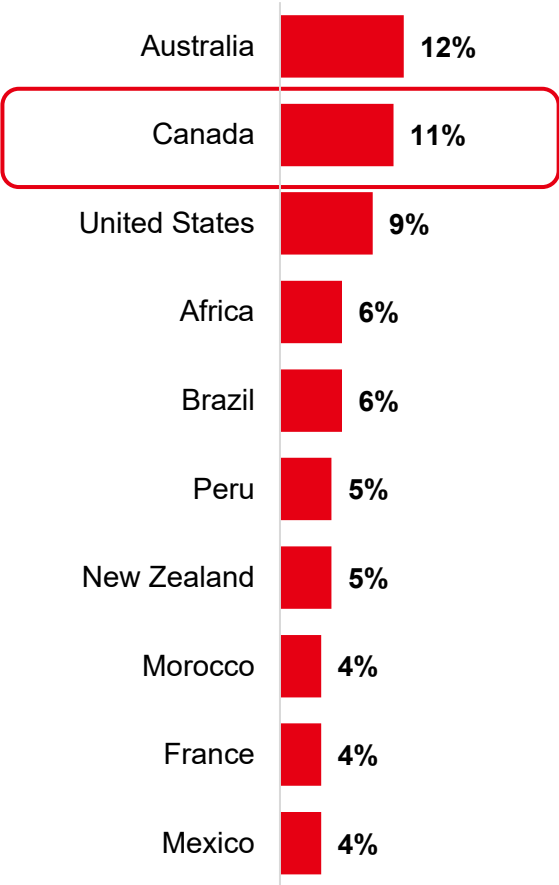
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INDIGENOUS TRAVEL



Carcross
Yukon

UNAIDED INDIGENOUS DESTINATION



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

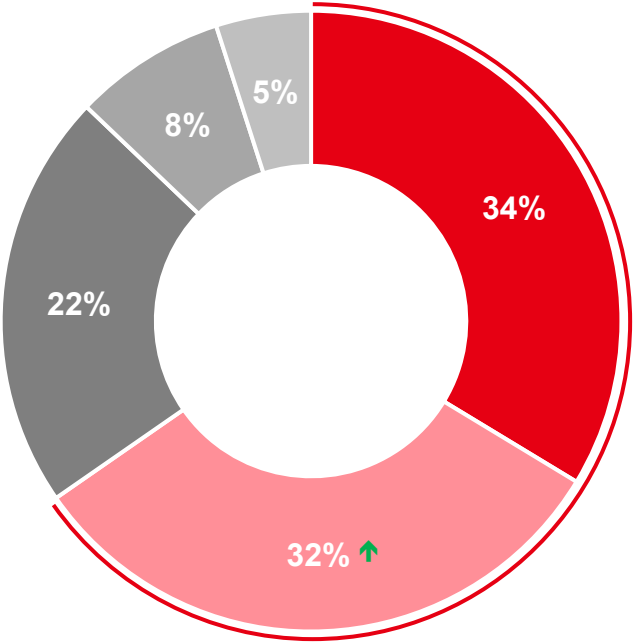
↑ / ↓ = significantly higher/lower result (2025 vs. 2024)
Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1506)
B4. [DESCRIPTION] What destinations come to mind when thinking about **Indigenous tourism**? (Please list up to 3 destinations. You can mention destinations within or 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.



INTEREST IN CANADA AS AN INDIGENOUS DESTINATIONS

Two thirds of French travellers are interested in participating in Indigenous experiences in Canada

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



4 or 5 (out of 5)
66%

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=744)
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?

↑ / ↓ = significantly higher/lower result (2025 vs. 2024)

FACTORS TO DRIVE INTEREST IN INDIGENOUS CULTURAL EXPERIENCES

Interest in Indigenous cultural experiences is driven by safety and comfort, alongside a preference for authentic experiences in natural settings.



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=762)
 C11. What factors would increase your interest in participating in Indigenous cultural experiences and tourism activities in a destination? (Select up to 3)

↑ / ↓ = significantly higher/lower result (2025 vs. 2024)

TRAVEL BEHAVIOURS



Montreal
Quebec

TOP 10 TRIP ANCHORS ACTIVITIES

29%

Oceanside Beaches

26%

Nature Walks

25%

Natural Attractions

24%

Historical, Archaeological or World Heritage Sites

23%

Nature Parks

22%

Hiking

20%

Learning about Indigenous culture, traditions, or history

20%

Local Markets

19%

Northern Lights

14%

Viewing Wildlife or Marine Life

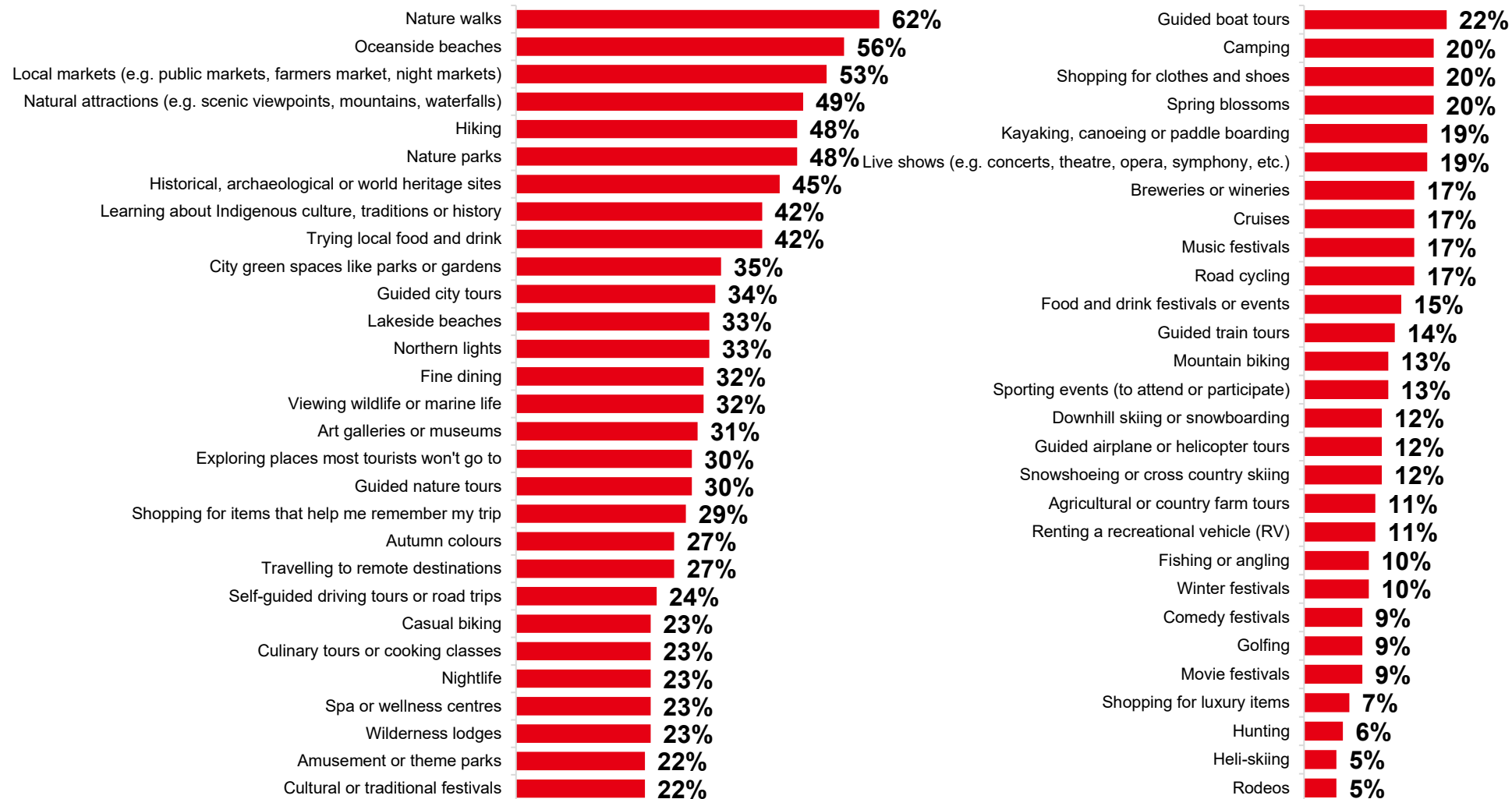


French travellers look for a diverse range of activities to base an entire holiday around, with oceanside beaches and nature walks topping the list.



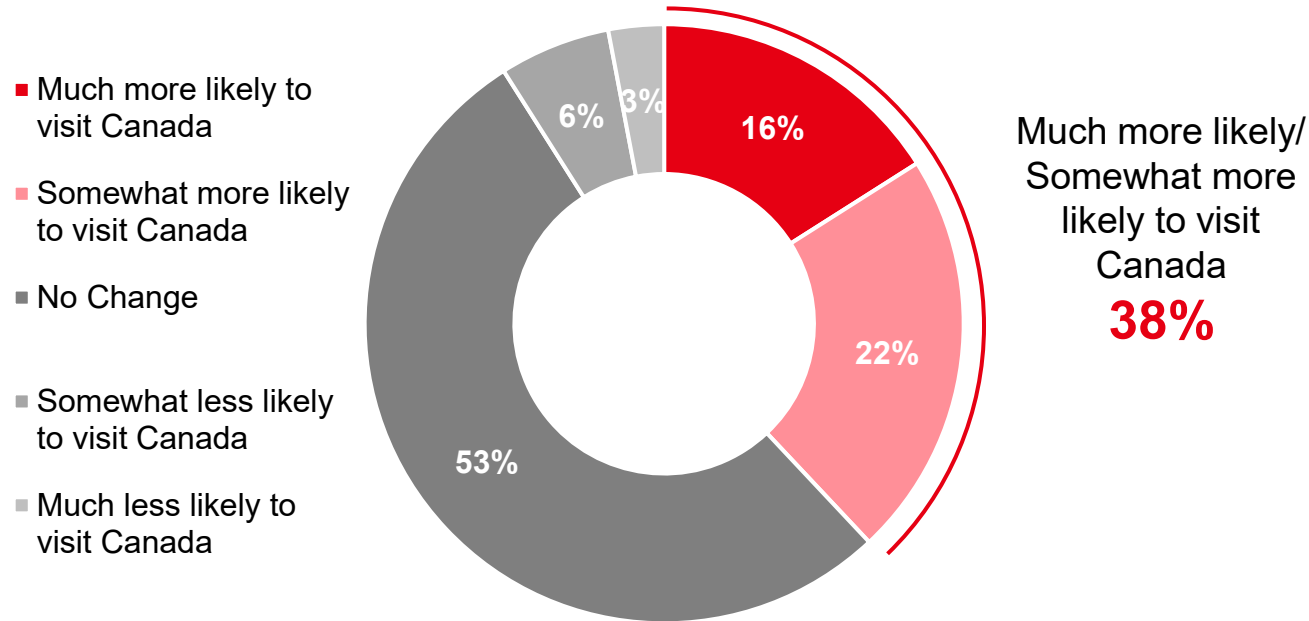
GENERAL ACTIVITIES INTERESTED IN (FULL LIST)

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



Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1506)
D4. In general, what activities or places are you interested in while on holiday? (Select all that apply)

STATED IMPACT OF GEOPOLITICAL CLIMATE ON VISITING CANADA



Geopolitical Climate Description

Geopolitical climate can include factors such as politics, international relations, trade disputes, or global conflicts.

Note: respondents were asked either about decision for which airline to fly with (D18) or stated impact of geopolitical climate on visiting Canada (E16)
Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=743)
E16. How does the current geopolitical climate affect your likelihood of visiting Canada?

Nearly four in ten French travellers feel that the geopolitical climate would make them more likely to visit Canada, with over one in ten stating it would make them much more likely to visit.

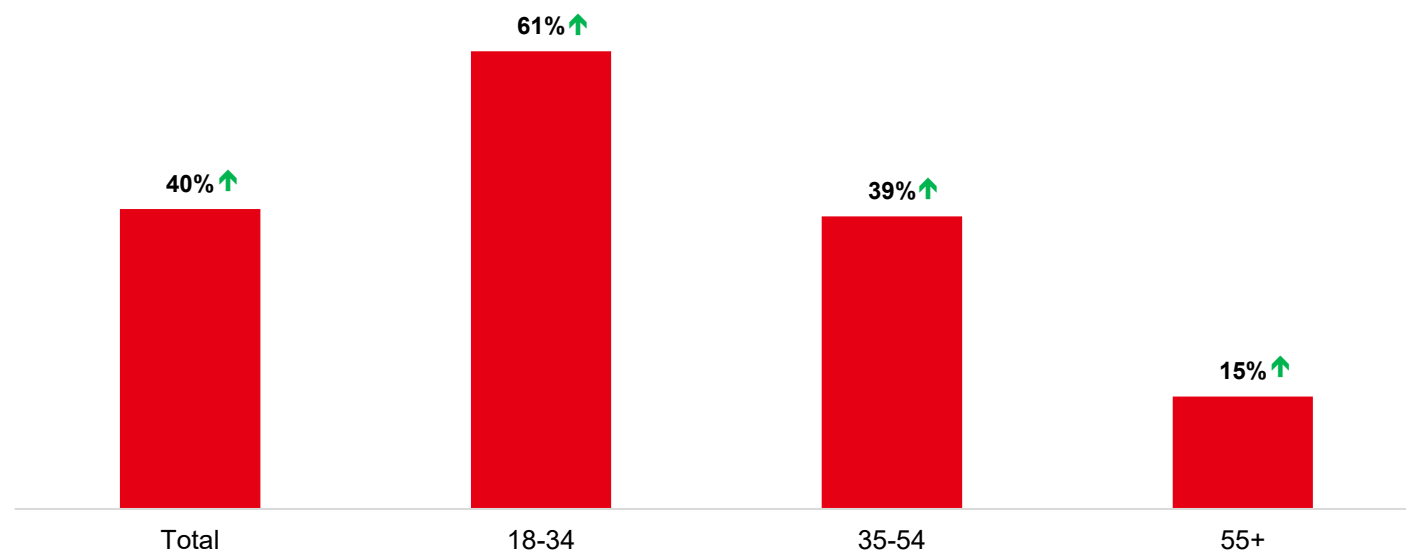


Canadian Museum of Human Rights, Winnipeg
Manitoba

France GTRP –
December 2025



USAGE OF AI TOOLS TO PLAN TRIPS: BY AGE



↑ / ↓ = significantly higher/lower result (2025 vs. 2024)

Note: Question wording was updated in 2025 to include "booking a trip"
 Base: Long-haul pleasure travellers (past 3 years or next 2 years) 2025 (n=1506); 2025 18-34 (n=530); 2025 35-54 (n=480); 2025 55+ (n=480)
 D14. Have you ever used an AI tool (e.g. ChatGPT or Bard) to research, plan or book a trip?

AI is gaining traction in travel planning among French travellers, with usage reaching four in ten overall and six in ten among 18-34 year olds.



Montmorency Falls Park, Quebec City
Quebec

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December 2025

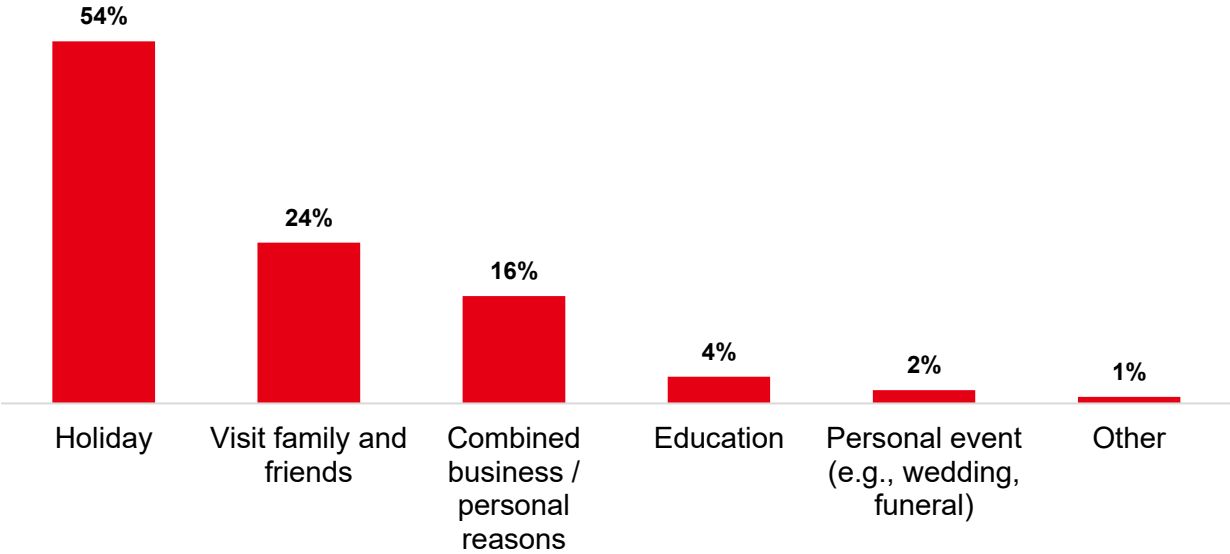


MOST RECENT TRIP TO CANADA



Le Pays de la Sagouine
New Brunswick

MAIN PURPOSE OF RECENT TRIP

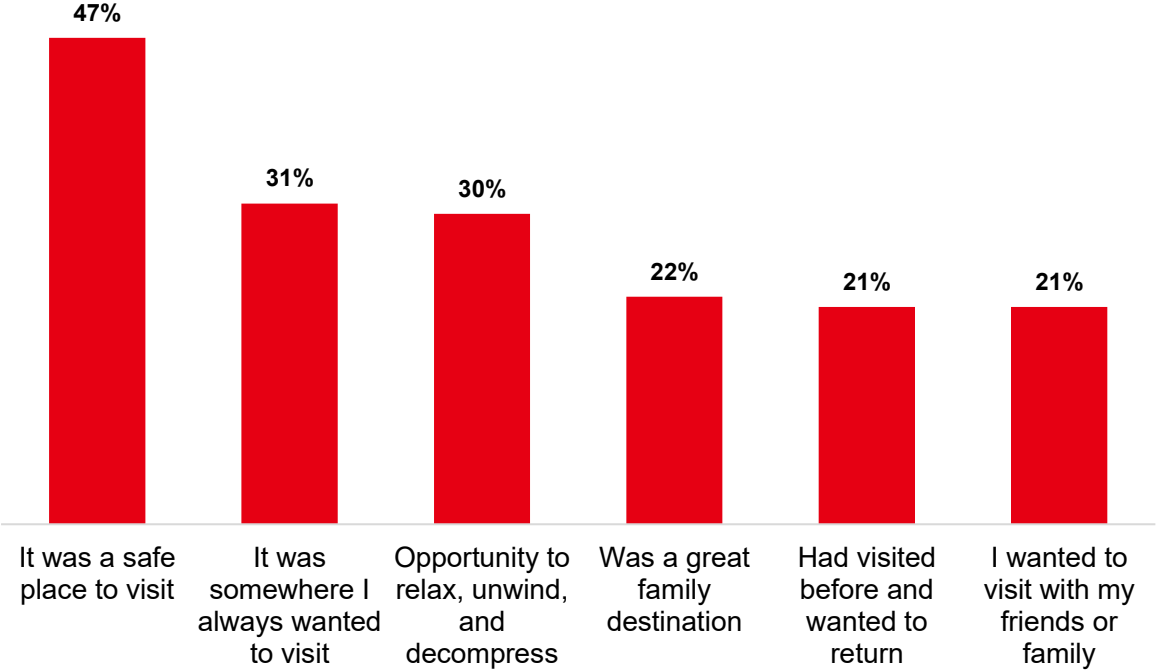


↑ / ↓ = significantly higher/lower result (2025 vs. 2024)
Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to Canada past 3 years (n=145)
F2. What was the main purpose of this trip? (Select one)

Consistent with 2024, most trips to Canada are for holidays, followed by visits to see family/friends.



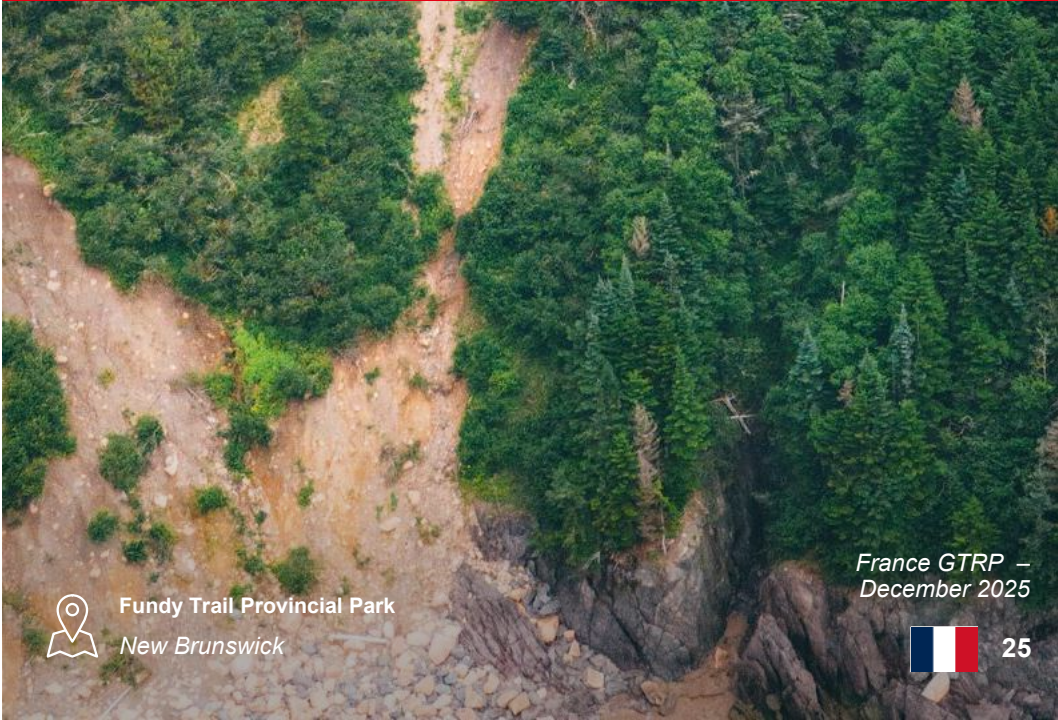
FACTORS IN CHOOSING DESTINATION FOR RECENT TRIP (TOP 6)



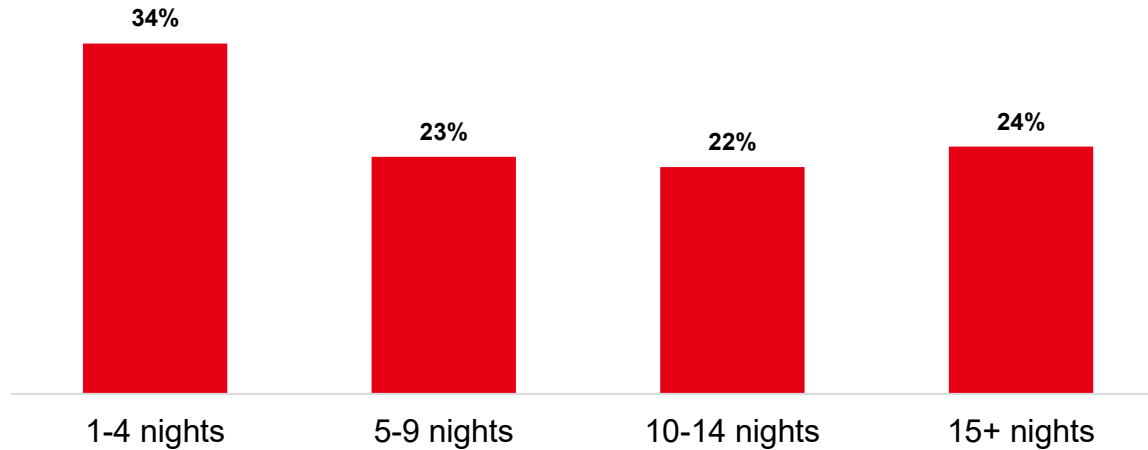
↑ / ↓ = significantly higher/lower result (2025 vs. 2024)
Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to Canada past 3 years, Took a holiday (n=79)
F3. Which of the following factored into your choice of destination for this trip? (Select all that apply)



French travellers are primarily drawn to Canada for its reputation as a safe destination and aspirational appeal.



NIGHTS SPENT DURING RECENT TRIP



↑ / ↓ = significantly higher/lower result (2025 vs. 2024)

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to Canada past 3 years (n=145)

F4. How many nights did you spend in this destination?

Trip length varies but shorter trips (1-4 nights) to Canada are slightly more common among French travellers.

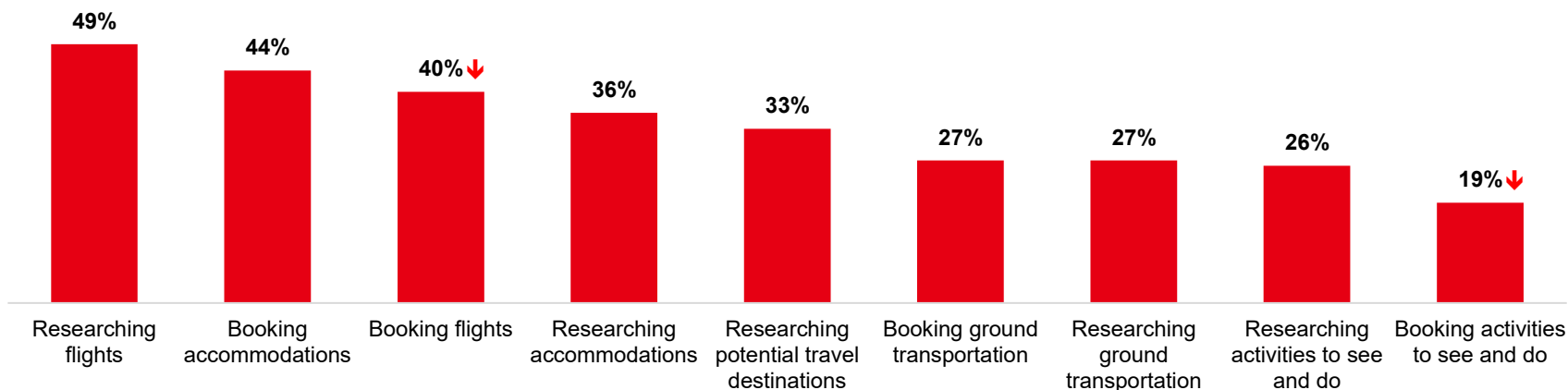


Barren Canyon, Algonquin Park
Ontario

France GTRP –
December 2025

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

42% used a travel agent



↑ / ↓ = significantly higher/lower result (2025 vs. 2024)

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to Canada past 3 years (n=145)

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 Carrefour Voyages or Voyageurs du Monde, they do not include AI Travel Assistants or 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)

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to Canada past 3 years, Used a Travel Agent/Tour Operator (n=60)

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

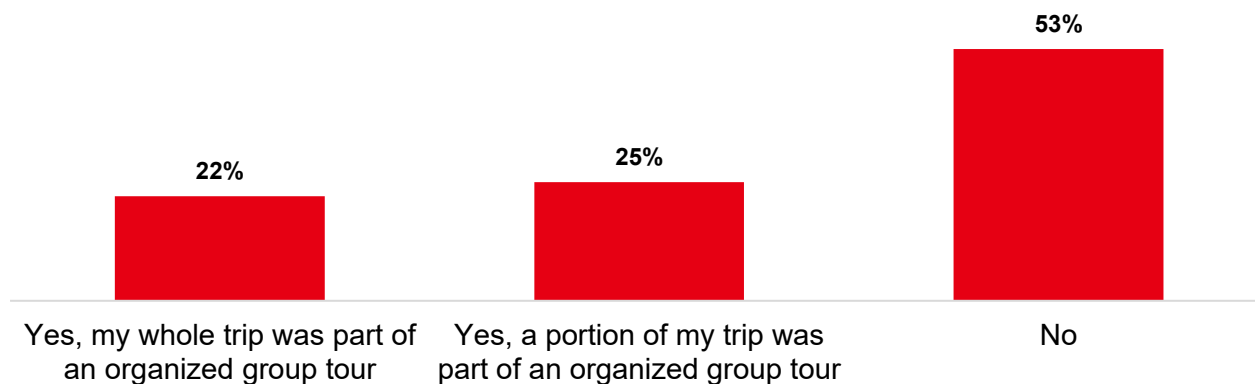
Over four in ten French travellers to Canada used a travel agent, primarily for researching flights, though fewer used them for booking flights compared to last year.

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December 2025

Twin Falls Lodge
Saskatchewan



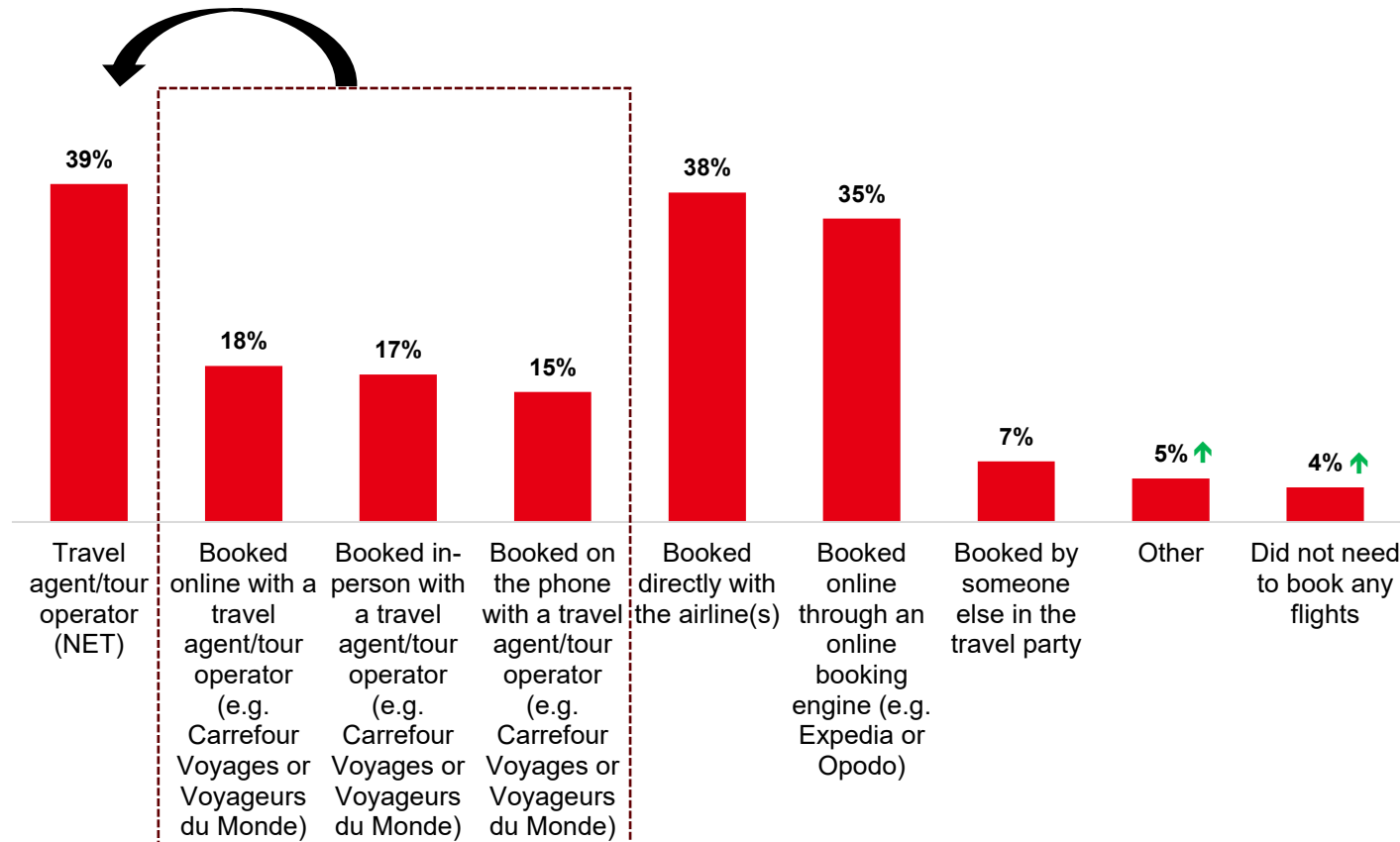
ORGANIZED GROUP TOUR FOR RECENT TRIP



Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to Canada past 3 years (n=145)
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?

Less than half of travellers used an organized group tour for at least part of their trip to Canada.

BOOKING FLIGHTS FOR RECENT TRIP



Recent French travellers to Canada most commonly booked flights through travel agents, airlines directly, or online booking engines.

↑ / ↓ = significantly higher/lower result (2025 vs. 2024)

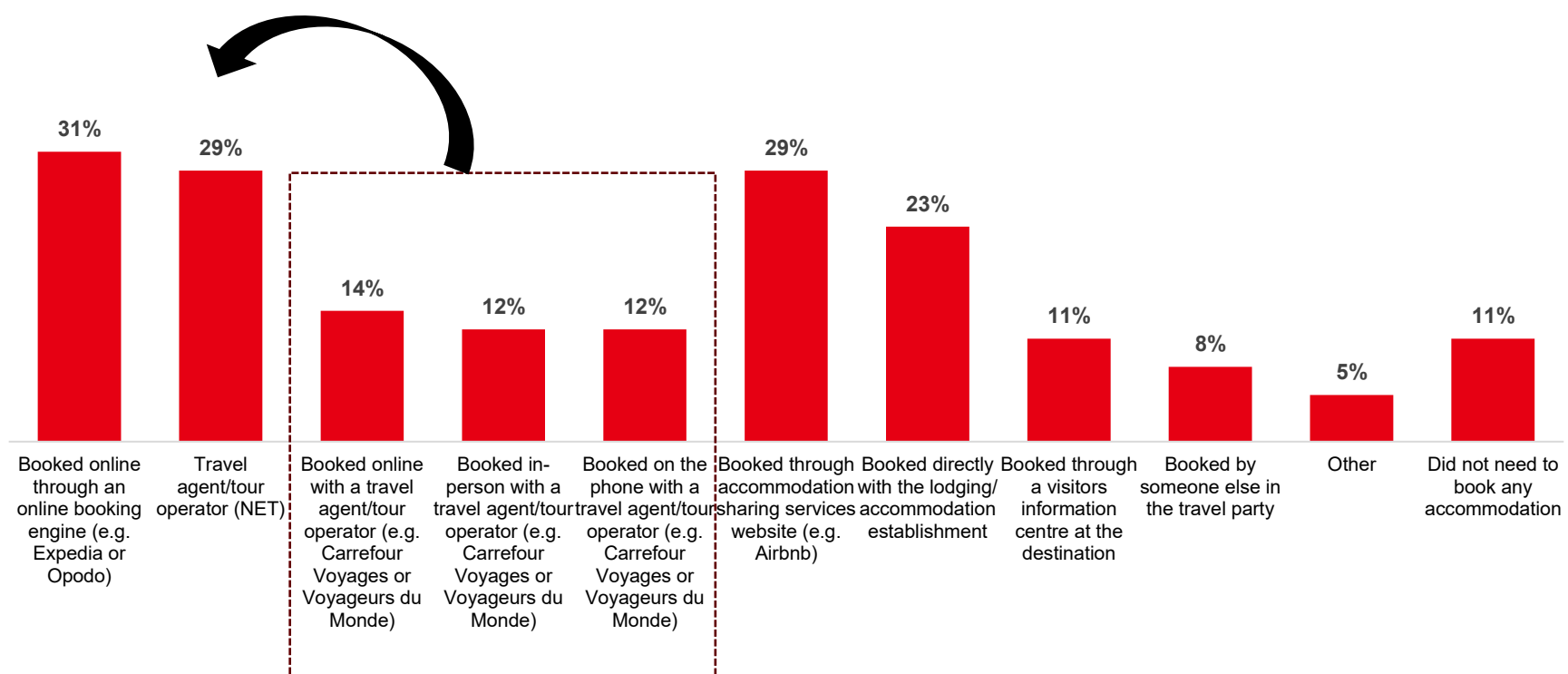
Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to Canada past 3 years (n=145)
F12. How did you book your flight for this trip? (Select all that apply)



Montmorency Falls Park, Quebec City
Quebec

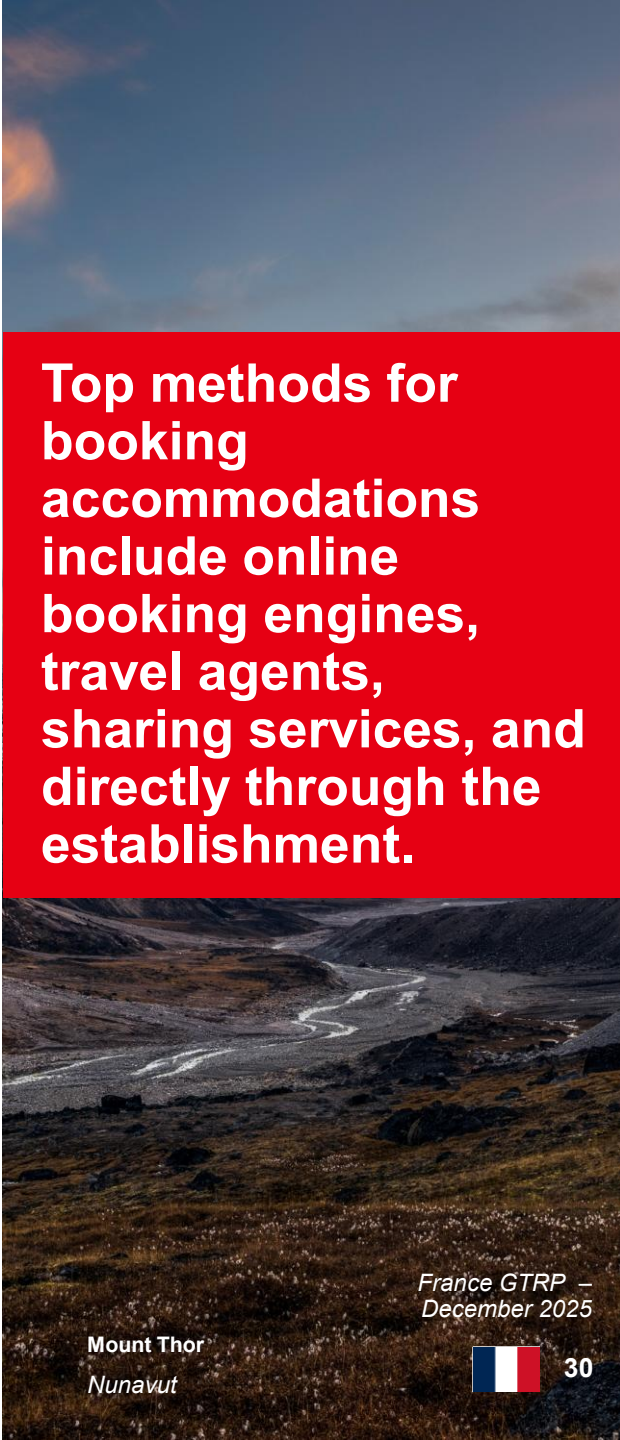
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BOOKING ACCOMMODATIONS FOR RECENT TRIP

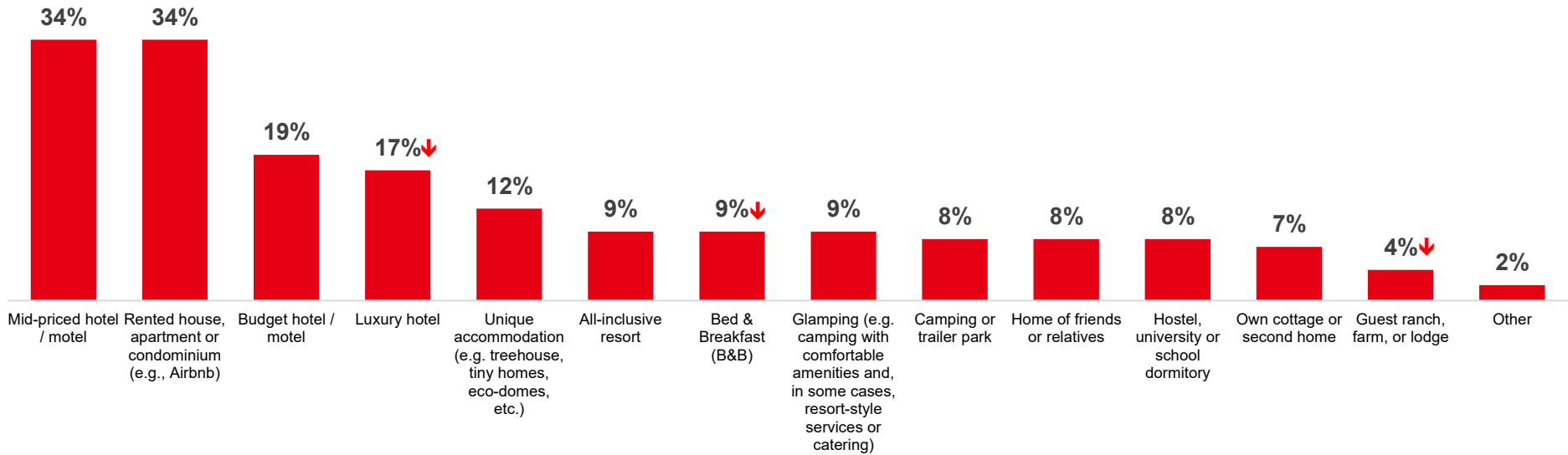


Top methods for booking accommodations include online booking engines, travel agents, sharing services, and directly through the establishment.

↑ / ↓ = significantly higher/lower result (2025 vs. 2024)
Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to Canada past 3 years (n=145)
F13. How did you book your accommodation for this trip? (Select all that apply)



TYPE OF ACCOMMODATIONS FOR RECENT TRIP



↑ / ↓ = significantly higher/lower result (2025 vs. 2024)

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to Canada past 3 years, Booked Accommodations (n=128)

F14. Which type of accommodation did you stay in during this trip? (Select all that apply)



French travellers that recently travelled to Canada were most likely to stay in mid-priced hotels or motels and rental homes.



THANK YOU

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

