2023 GLOBAL TRAVELLER RESEARCH PROGRAM
SYNDICATED REPORT
## FRANCE MARKET OVERVIEW

DESTINATION CANADA
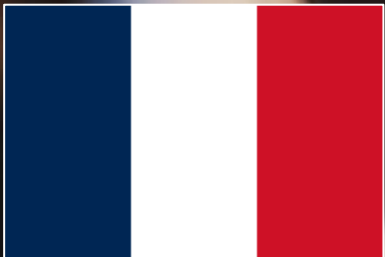
CANADIAN TOURISM DATA collective

France Market Overview

An annual view of the French market to help understand general trends towards travel and how Canada fares against competitors on key destination brand metrics.

Please note that the insights in this report are drawn from two of YouGov's proprietary syndicated data products, **YouGov Global Travel Profiles** and **YouGov DestinationIndex**. As a result, access to and sharing of this report and its underlying data are restricted to those within Destination Canada's organization and among organizations with access to the Canadian Tourism Data Collective (CTDC).
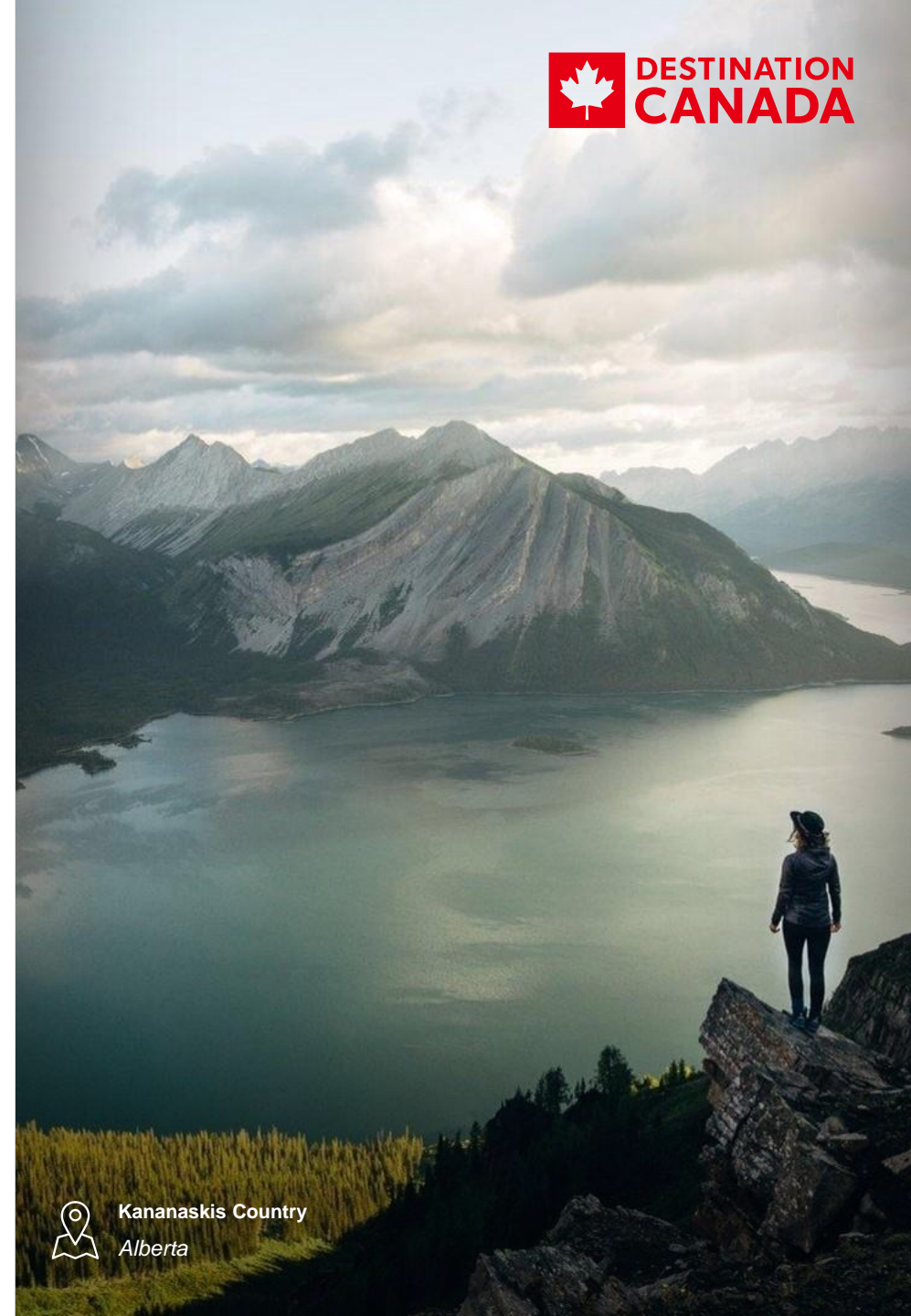
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Syndicated Product Overview

YouGov® Global Travel Profiles

YouGov Global Travel Profiles (GTP) surveys consumers daily in 30 key travel origin markets, to help travel & tourism organizations identify who is ready to travel when, where they want to go and what kind of trip they are planning.

Survey Start in France	**Methodology Notes**	**2023 Base Sizes**
October 24, 2020	Attitudinal statements are integrated into YouGov Global Travel Profiles platform from another YouGov study. These questions have lower sample sizes than other variables.	Sample distribution: **National 18+** Total France: **14,228**

Syndicated Product Overview

YouGov DestinationIndex

YouGov DestinationIndex is an always-on destination brand tracker. Daily data enables you to spot sentiment changes in real-time and take action, while measuring and benchmarking performance. Track public perception of Canada and other destinations across 16 brand metrics to track destination brand health, inform strategy, and ultimately influence travellers' perception of Canada.

Survey Start in France

September 14, 2020

Methodology Notes

Maximum of 30 destinations shown to any panel member at any given time, with sample split accordingly as more than 30 destinations are tracked. Destinations are added to the tracker on an on-going basis.

2023 Base Sizes

Sample distribution: **National 18+**

Total France: **6,479 - 7,092**

Syndicated Product Overview

DESTINATION CANADA

YouGov® DestinationIndex

16 **key metrics**

Engagement: Media & communication metrics

1 **Advertising Awareness**
Which of the following destinations have you seen an advertisement for in the PAST TWO WEEKS?

2 **Aided Awareness**
Which of the following destinations have you ever heard of? Please select all that apply.

3 **Attention**
Respondents hearing positive OR negative buzz about the destination.

4 **Buzz**
Over the PAST TWO WEEKS, which of the following destinations have you heard something POSITIVE about (whether in the news, through advertising, or talking to friends and family)? Now which of the following have you heard something NEGATIVE about over the PAST TWO WEEKS?

5 **Word of Mouth Exposure**
Which of the following destinations have you talked about with friends or family in the PAST TWO WEEKS (whether in-person, online, or through social media)?

5

Lower funnel metrics

6 **Purchase Intent**
Which of the proposed destinations are you most likely to visit?

7 **Consideration**
When you are in the market next to plan a vacation or a fun day out for yourself / your family, which destinations would you consider?

8 **Recent Visitor (Current Customer)**
Which of the following destinations have you visited in the past 12 months?

9 **Former Visitor (Former Customer)**
Which of the following destinations have you ever visited?

Destination / Brand health metrics

10 **General Impression**
Overall, of which of the following destinations do you have a POSITIVE impression? Now which of the following destinations do you have an overall NEGATIVE impression?

11 **Visitor Satisfaction**
Of which of the following destinations would you say that you are a "SATISFIED VISITOR"? Of which of the following destinations would you say that you are a "DISSATISFIED VISITOR"?

12 **Quality**
Which of the following destinations do you think have a GOOD QUALITY? Now which of the following destinations represents POOR QUALITY?

13 **Value**
Which of the following destinations do you think represents GOOD VALUE FOR MONEY? By that we don't mean 'cheap,' but that the destinations offer a visitor a lot in return for the price paid. Now which of the following destinations do you think represents POOR VALUE FOR MONEY? By that, we don't mean 'expensive,' but that the destinations do not offer a visitor much in return for the price paid.

14 **Reputation**
Which of the following destinations do you regard as having a GOOD reputation for vacations? Now which of the following destinations do you regard as having a POOR reputation for vacations?

15 **Recommendation**
Which of the following destinations would you RECOMMEND to a friend or colleague? And which of the following destinations would you tell a friend or colleague to AVOID?

16 **Index** *(Overall Destination Health)*
Average of Impression, Quality, Value, Reputation, Satisfaction & Recommend

Key Insights

Cost is impacting French travel behaviours
- Planned international travel continues to surge post-pandemic, yet fewer trips are planned than in 2022
- Cost of travel and accommodation are the top barriers preventing travel
- French are less excited to spend more when travelling
- Overall value for money is the top destination choice influence

> *Although cost of travel and accommodation are significant obstacles, the most mentioned factor influencing destination choice is overall value for money, suggesting that emphasizing strong value could help mitigate cost concerns*

French prioritize cultural experiences when travelling
- Most French agree that you can only ever get to know a country by experiencing its culture
- There is a strong preference towards learning while travelling
- They prefer personalized stays, often opting for rental accommodations

> *Promoting Canada's diverse cultural experiences can be key to attracting French visitors who prioritize cultural immersion and learning*

French are independent when planning vacations
- The vast majority of French travellers organize their own vacations
- 59% already have at least one destination in mind or selected when planning their vacations
- 54% enjoy researching and coming up with a plan for their vacation
- Online search and information from friends and family are the preferred resources for vacation planning

> *Canada could influence more travellers to choose it for their next vacation by leveraging recommendations and user-generated content from friends and family who have visited before*

French hold extremely positive perceptions of Canada
- Canada ranks first in 7 of 8 key performance metrics
- Positive reputation and overall destination health improved year-over-year, recovering from declines in 2022
- Canada narrowly leads the US in ad awareness, yet Canada has a substantial lead in overall destination health and consideration
- Scores for Japan have grown across all metrics, and China has seen growth in two metrics

> *Capitalizing on French people's existing positive perceptions, Canada can sustain its performance and convert travellers in the near-term. Monitoring growing markets may help anticipate new potential challenges*

France Market Overview

Attitudes Towards Travel

DESTINATION CANADA

French prioritize cultural experiences and learning opportunities when travelling and are inclined to venture off the beaten track, but have become less excited about spending more while travelling. French often already have a destination in mind when vacation planning and enjoy the planning process

Legend: ■ Definitely disagree ■ Tend to disagree ■ Neither agree nor disagree ■ Tend to agree ■ Definitely agree

Statement	Definitely disagree	Tend to disagree	Neither agree nor disagree	Tend to agree	Definitely agree	Definitely / Tend to agree (Top 2 box)
You can only ever get to know a country by experiencing its culture	1%	3% ▼	21%	53%	20%	74%
I like to come back from vacation having learned something new	2%	4%	23%	52%	20%	72%
When I'm planning my next vacation I have at least one destination in mind or already selected	4%	12%	25%	46% ▲	13%	59%
When I go on vacation, I like to go off the beaten track	2%	8%	33%	44%	13%	57%
I enjoy researching and coming up with a plan for my vacations	7%	11% ▼	27%	42%	12%	54%
I am passionate about travelling	7%	11%	28%	37%	17%	54%
I try to keep to a strict budget when I go on vacation	5%	17%	29%	41%	10%	50%
I tend to book my short breaks (i.e., up to 3 days) outside of school holidays/breaks	14%	11%	25%	32%	18%	50% ▲
I like my vacation to have some form of physical activity	7% ▲	14%	31%	37%	11%	48%
I tend to book my vacations (i.e., more than 3 days) outside of school holidays/breaks	17%	14%	25% ▼	26%	17%	44%
I like to take vacation in the country I live in rather than abroad	10%	17%	36%	26% ▲	11%	37%
When I go on vacation I only want to eat, drink and lie in the sun	11%	26%	26%	27%	10%	37%
I would never think of taking a package holiday/vacation	8%	14% ▲	44% ▼	21%	13%	34%
I usually go back to the same places on vacation	13%	26%	34%	22%	5%	27%
I like to go on vacation where activities are organized for me	16%	22%	36%	22%	4%	26%
I am excited to generally spend more when travelling	18% ▲	26%	34%	18% ▼	4%	22% ▼
I usually wait for last minute deals rather than planning my vacation or short break in advance	19%	24%	35% ▼	17%	5%	22%
I try to shop Duty Free at airports/train stations rather than at the main stores for a better deal	37%	22%	26%	12%	3%	15%

8

Base: French 18+ (n=12,380-13,414)
Q: Do you agree or disagree with the following statement?

▲ / ▼ = significantly higher/lower result (vs. 2022)

Trip Types Planned in Next 12 Months

2023 saw year-over-year increases in both international and domestic vacation planning. International vacation plans surged post-pandemic, experiencing a 15-percentage point increase from the beginning of 2021 to the end of 2023

Trip Types Planned in Next 12 Months

- Domestic vacation: **60%** ▲
- International vacation: **44%** ▲
- Domestic business trip: **4%**
- International business trip: **3%**

Vacation Trips Planned in Next 12 Months (Trended)

Domestic vacation: 59%, 61%, 58% ▼, 57%, 58%, 59%, 57%, 57%, 60% ▲, 60%, 58%, 61%

International vacation: 30%, 30%, 33% ▲, 37% ▲, 38%, 38%, 42% ▲, 42%, 44%, 43%, 45%, 45%

Timeline: 2021 (Q1 Q2 Q3 Q4) | 2022 (Q1 Q2 Q3 Q4) | 2023 (Q1 Q2 Q3 Q4)

— Domestic vacation   — International vacation
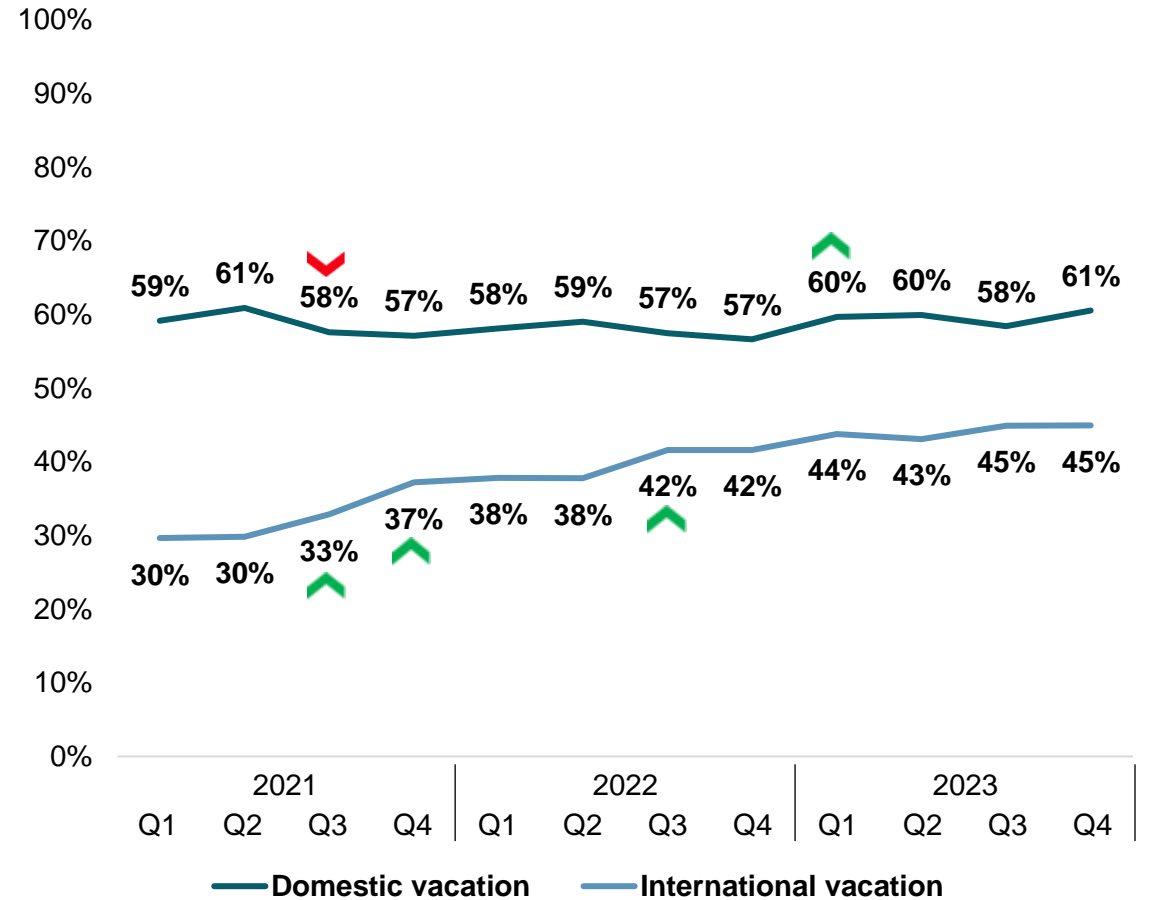
2023 Base: French 18+ (n=14,228)
2021-2023 Quarterly Trending Base Range: French 18+ (n=3,448-3,667)
Q: Which, if any, of the following trips are you planning to take in the next 12 months?
Please select all that apply.

YouGov Global Travel Profiles (France) – 2023

▲ / ▼ = significantly higher/lower result (vs. 2022) | ▲ / ▼ = significantly higher/lower result (vs. previous quarter)

Number of Trips Planned in Next 12 Months

DESTINATION CANADA

French are planning fewer individual trips compared to previous years, with less than half intending to travel twice or more.
Uncertainty in the number of trips planned (i.e., fluctuating "don't know" scores) may be the result of economic concerns

Number of Trips Planned

% 2 or more trips   48% ▼

- ■ 5 or more
- ■ 4
- ■ 3
- ■ 2
- ■ 1
- ■ Don't know
- ■ Not applicable - I do not plan to travel in the next 12 months

Category	Total France
5 or more	8%
	4%
4	11% ▼
3	25% ▼
1	21% ▼
Don't know	18% ▲
Not applicable	12% ▲

Total France

Number of Trips Planned (Trended)

2 or more trips:
- 2021 Q1: 52%
- Q2: 51%
- Q3: 51%
- Q4: 54% ▲
- 2022 Q1: 56%
- Q2: 54%
- Q3: 52%
- Q4: 48% ▼
- 2023 Q1: 50%
- Q2: 48%
- Q3: 47%
- Q4: 48%

Don't know:
- 2021 Q1: 15%
- Q2: 16%
- Q3: 19% ▲
- Q4: 17% ▼
- 2022 Q1: 14% ▼
- Q2: 15%
- Q3: 18% ▲
- Q4: 20%
- 2023 Q1: 18% ▼
- Q2: 17%
- Q3: 20% ▲
- Q4: 19%

— **2 or more trips**   — **Don't know**

YouGov Global Travel Profiles (France) – 2023

▲ / ▼ = significantly higher/lower result (vs. 2022) | ▲ / ▼ = significantly higher/lower result (vs. previous quarter)
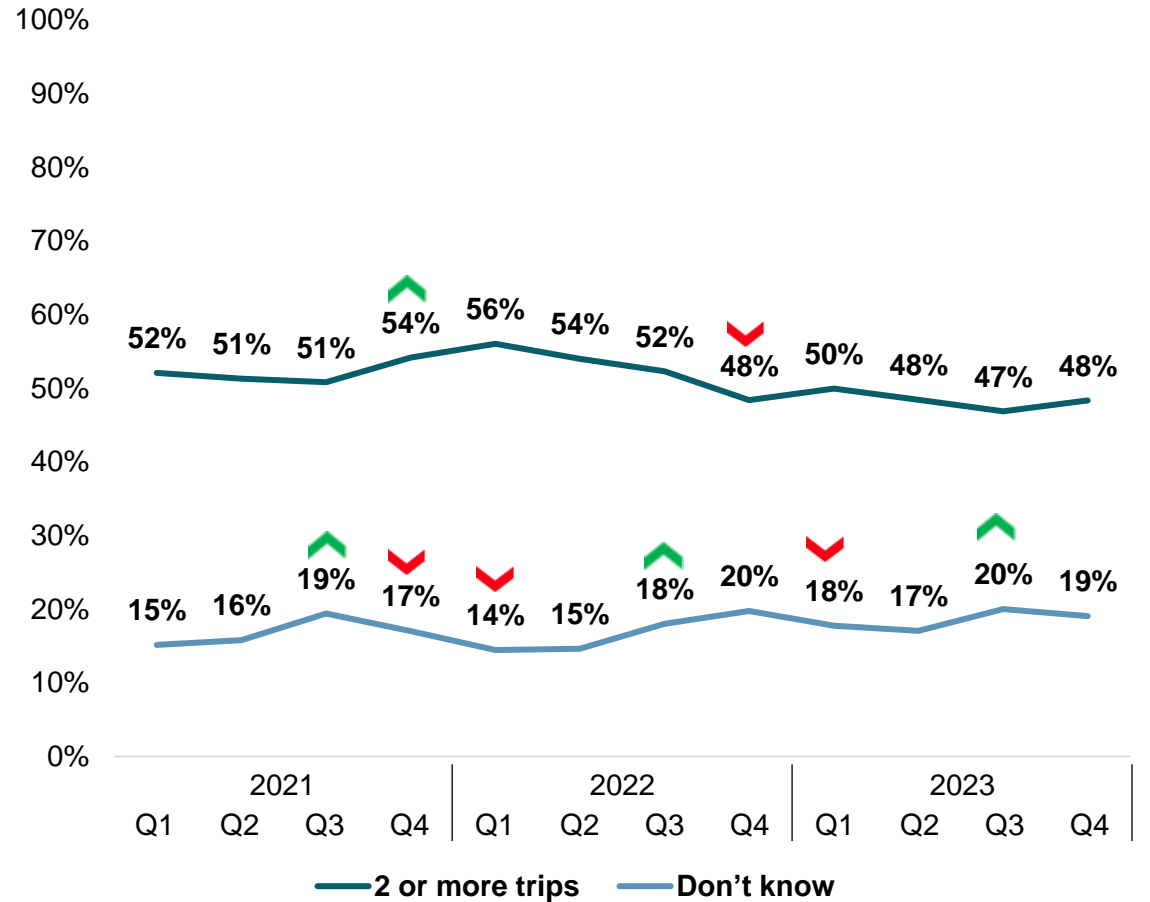
Factors Preventing Travel

The price of travel and accommodation have emerged as the top barriers in the post-pandemic era, doubling in mentions since the beginning of 2021

Factors Preventing Travel

Factor	Value
Price of travel	48% ▲
Price of accommodation	34% ▲
Work	20% ▲
Own / family health situation	13%
Safety	12%
Health risks	7% ▼
Availability of accommodations	7%
Travel restrictions	5% ▼
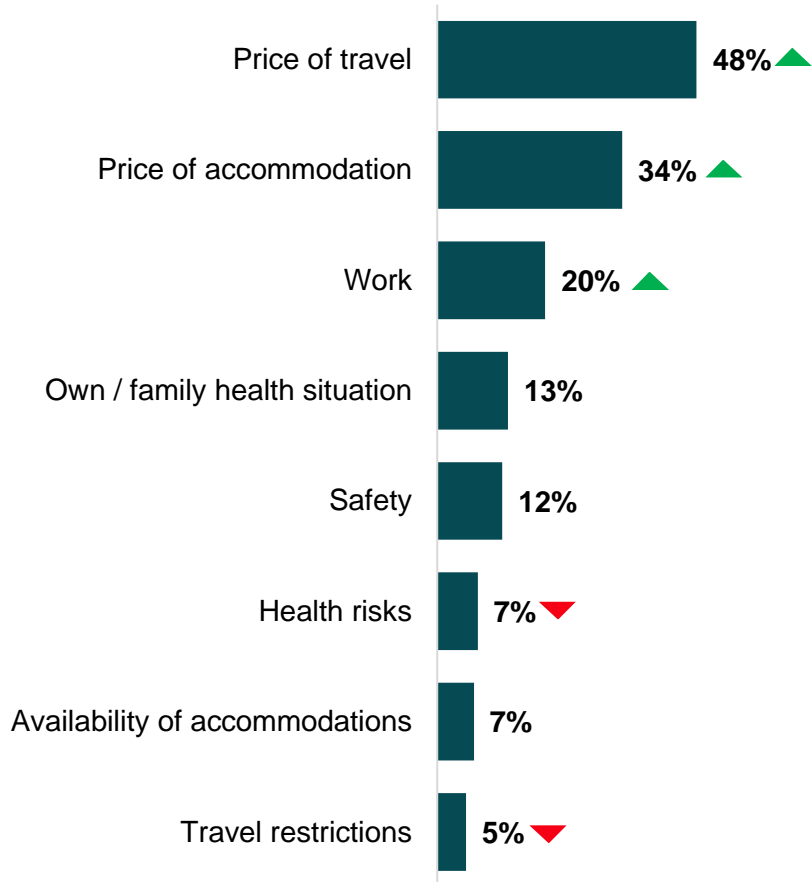
Select Factors Preventing Travel (Trended)

Price of travel:
- 2021 Q1: 24%
- Q2: 27%
- Q3: 30%
- Q4: 34%
- 2022 Q1: 36%
- Q2: 44%
- Q3: 44%
- Q4: 47%
- 2023 Q1: 47%
- Q2: 47%
- Q3: 48%
- Q4: 50%

Price of accommodation:
- 2021 Q1: 17%
- Q2: 20%
- Q3: 21%
- Q4: 23%
- 2022 Q1: 25%
- Q2: 29%
- Q3: 32%
- Q4: 33%
- 2023 Q1: 32%
- Q2: 35%
- Q3: 34%
- Q4: 35%

—— Price of travel   —— Price of accommodation

2023 Base: French 18+ (n=14,228)
2021-2023 Quarterly Trending Base Range: French 18+ (n=3,101-3,667)
Q: Which, if any, of the below factors are currently preventing you from travelling? Please select all that apply.

YouGov Global Travel Profiles (France) – 2023

▲ / ▼ = significantly higher/lower result (vs. 2022) | ▲ / ▼ = significantly higher/lower result (vs. previous quarter)

Destination Choice Influences

What draws French travellers to destinations has stayed relatively consistent in 2023. Mentions of a destination's low cost have increased and continue to rank fifth, while overall value for money remains the top influence

Destination Choice Influences (Top Responses)

Influence	%
Overall value for money	49%
The temperature/climate of my vacation destination	41%
Outstanding natural beauty in/near my vacation destination	32%
Culture and historical sites in/near my vacation destination	28%
Low cost ▲	26%
Availability of accommodations	21%
I have been there and really liked it/special memory	21%
Having friends/family in/near my vacation destination	20%
Availability of transportation to my vacation destination ▲	17%
Recommended by someone	16%

Select Destination Choice Influences (Trended)
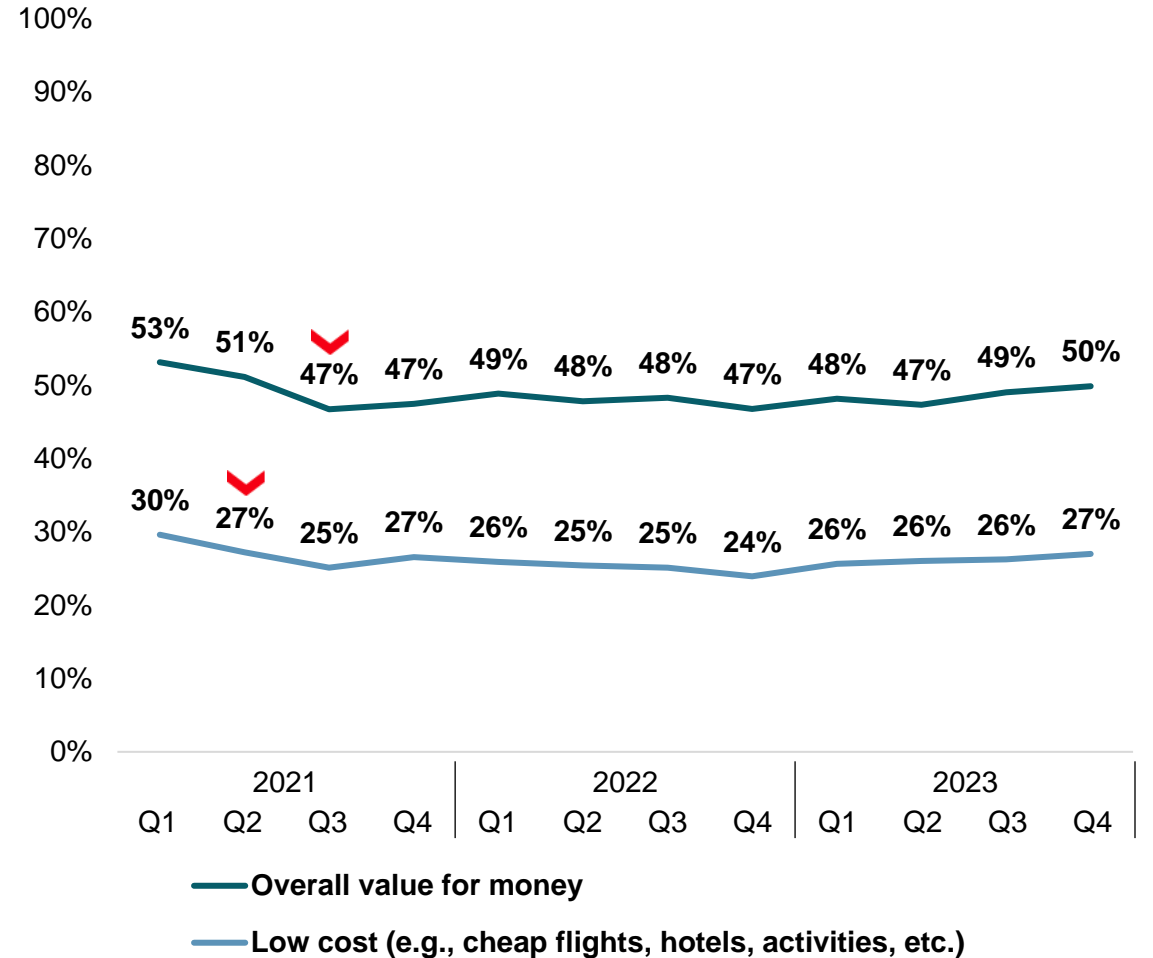
Overall value for money: 53%, 51%, 47%, 47%, 49%, 48%, 48%, 47%, 48%, 47%, 49%, 50%

Low cost (e.g., cheap flights, hotels, activities, etc.): 30%, 27%, 25%, 27%, 26%, 25%, 25%, 24%, 26%, 26%, 26%, 27%

Quarters: 2021 Q1–Q4, 2022 Q1–Q4, 2023 Q1–Q4

2023 Base: French 18+ (n=14,228)
2021-2023 Quarterly Trending Base Range: French 18+ (n=3,101-3,667)
Q: Thinking of your most recent vacation, which, if any, of the following influenced your choice of destination? Please choose all that apply.

YouGov Global Travel Profiles (France) – 2023

▲ / ▼ = significantly higher/lower result (vs. 2022) | ▲ / ▼ = significantly higher/lower result (vs. previous quarter)

Favourite Types of Vacations
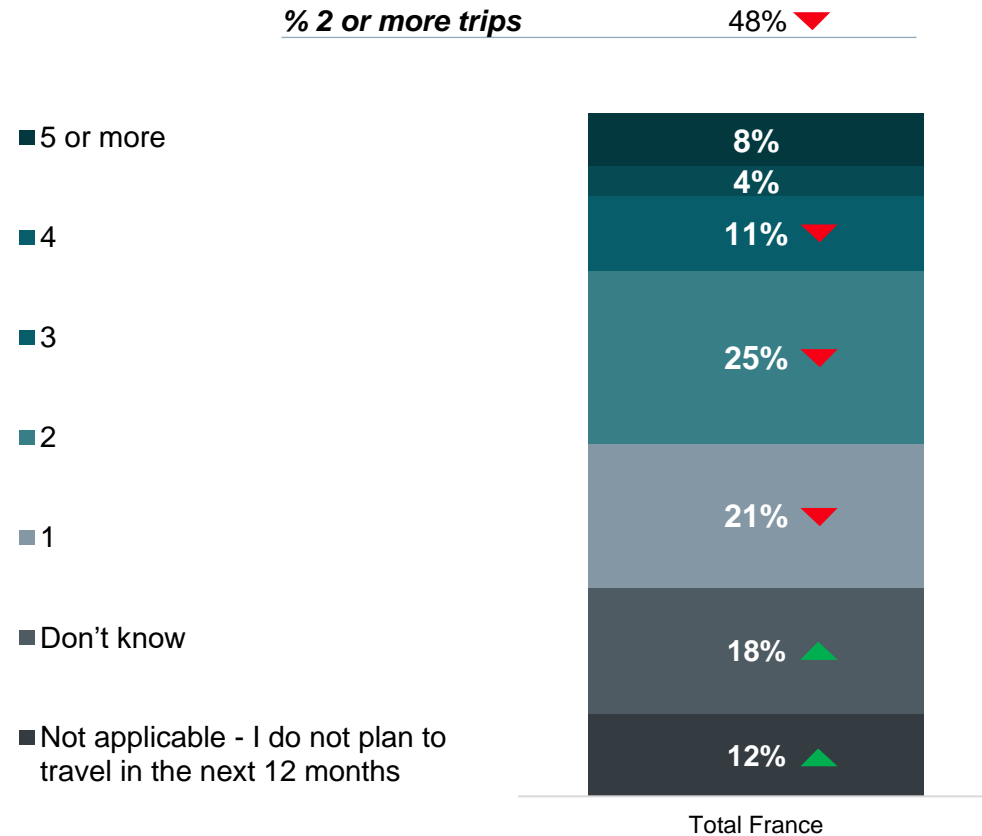
Beach holidays, visits to friends and family, and vacations combining relaxation and sightseeing top the list of French travellers' favourite types of vacations

Favourite Types of Vacations (Top Responses)

Type	%
Beach (relaxing)	38%
Visit friends and family	36%
Combined relaxing and sightseeing/activity vacations	36% ▲
City breaks (i.e., a short vacation spent in a city)	22% ▲
Culture and history	19% ▲
Lakes/mountains/countryside (NOT including winter sports)	18%
Activities (e.g., walking and hiking, cycling, health and fitness etc)	18%
Multi-centred vacations	16%
Camping/caravanning	14% ▼
Vacation at a theme park	7%
Winter sports (e.g., skiing, snowboarding, etc.)	7%
Spa vacation/health spa vacation	6%

Select Favourite Types of Vacations (Trended)

Combined relaxing and sightseeing/activity vacations: 35%, 34%, 34%, 34%, 34%, 33%, 34%, 35%, 35%, 35%, 37%, 37%

City breaks (i.e., a short vacation spent in a city): 20%, 18%▼, 20%▲, 20%, 20%, 19%, 19%, 21%, 23%▲, 21%, 22%, 22%

— Combined relaxing and sightseeing/activity vacations

— City breaks (i.e., a short vacation spent in a city)

2023 Base: French 18+ (n=14,228)
2021-2023 Quarterly Trending Base Range: French 18+ (n=3,498-3,667)
Q: Thinking more generally about the vacations that you go on, not just those that you have taken in the last 12 months, which, if any, of the following types of vacations do you typically take? Please select all that apply.

13

▲ / ▼ = significantly higher/lower result (vs. 2022) | ▲ / ▼ = significantly higher/lower result (vs. previous quarter)

Vacation Planning Methods

There have been no changes in French travellers' vacation planning methods: online search and information from friends and family remain the most popular resources

Vacation Planning Methods

Method	%
Online random search	45%
Information from friends/family	33%
Information from specialized travel shopping websites	23%
Destination Marketing Organization	15%
Information from travel blogs	14%
Social media platforms	10%
Information from online dedicated forums	8%
Information from printed resources	8%
Information from television/radio	5%
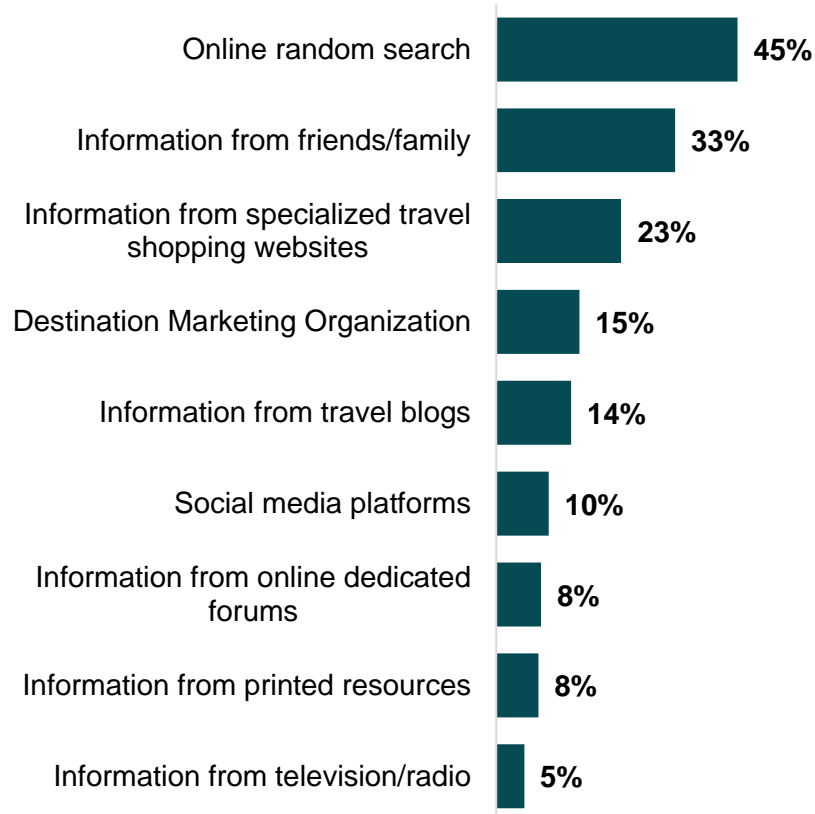
Select Vacation Planning Methods (Trended)

Online random search: 54%, 47%, 45%, 47%, 46%, 44%, 45%, 44%, 43%, 45%, 45%, 46%

Information from friends/family: 38%, 34%, 33%, 33%, 33%, 32%, 34%, 32%, 32%, 33%, 33%, 35%

Timeline: 2021 (Q1 Q2 Q3 Q4) | 2022 (Q1 Q2 Q3 Q4) | 2023 (Q1 Q2 Q3 Q4)

— Online random search   — Information from friends/family

2023 Base: French 18+ (n=14,228)
2021-2023 Quarterly Trending Base Range: French 18+ (n=3,101-3,667)
Q: Which, if any, of the following methods do you generally use to help plan a vacation?
Please select all that apply.

YouGov Global Travel Profiles (France) – 2023
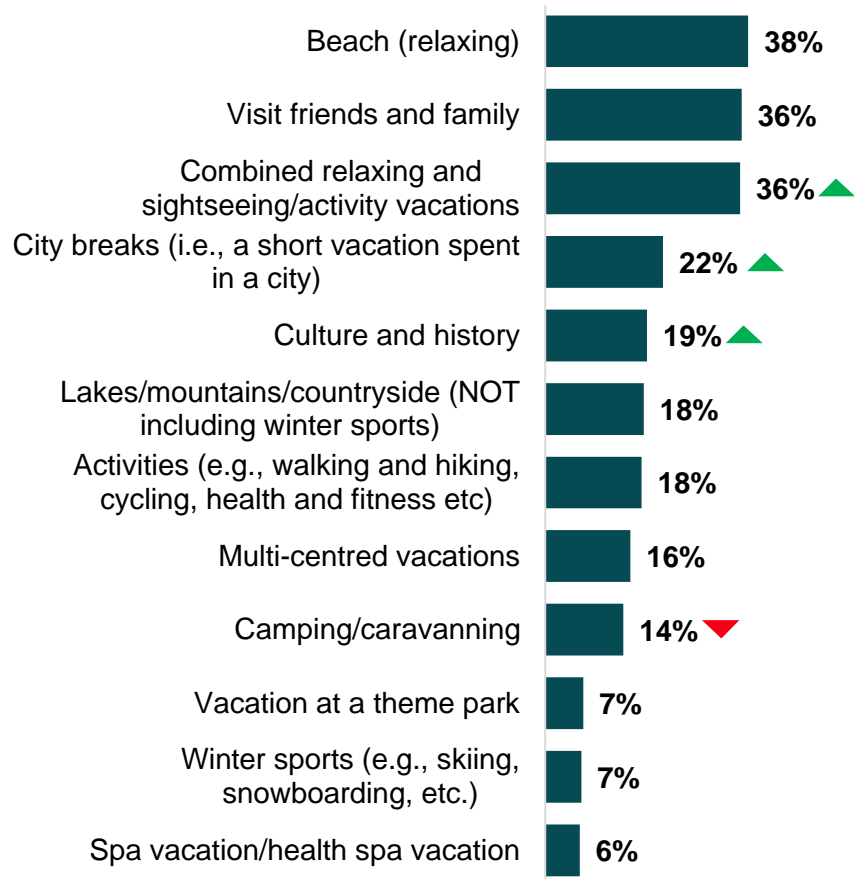
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Vacation Organization Habits
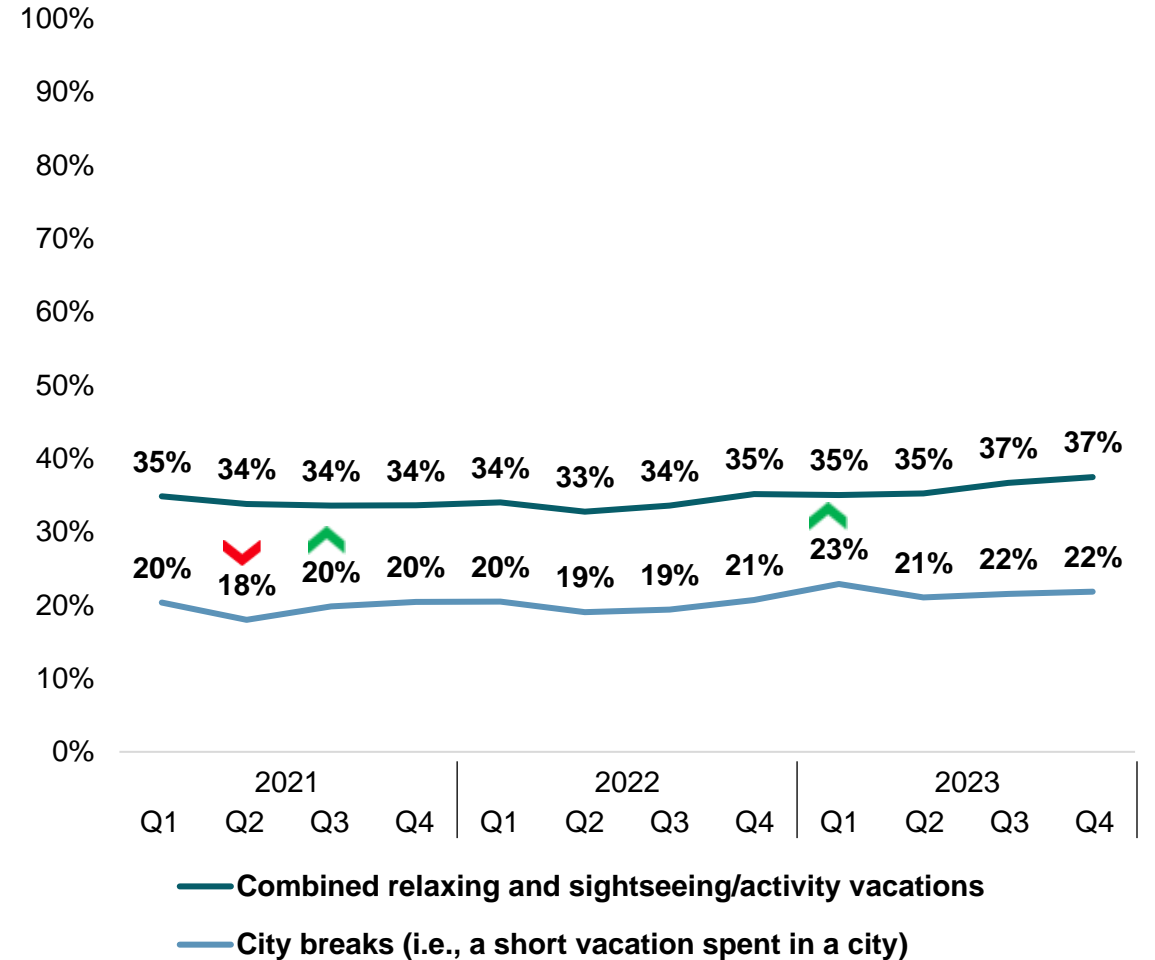
The vast majority of French travellers organize their own vacations. As international vacations regain popularity, the preference for on-the-go booking and using a fully customized bespoke service are on the decline

Vacation Organization Habits

- Self-organized: **74%** ▲
- Part-organized part-not: **12%**
- Group organized travel: **8%**
- Booking on-the-go (1-2 days before an overnight stay): **4%** ▼
- Fully customized bespoke service: **3%** ▼
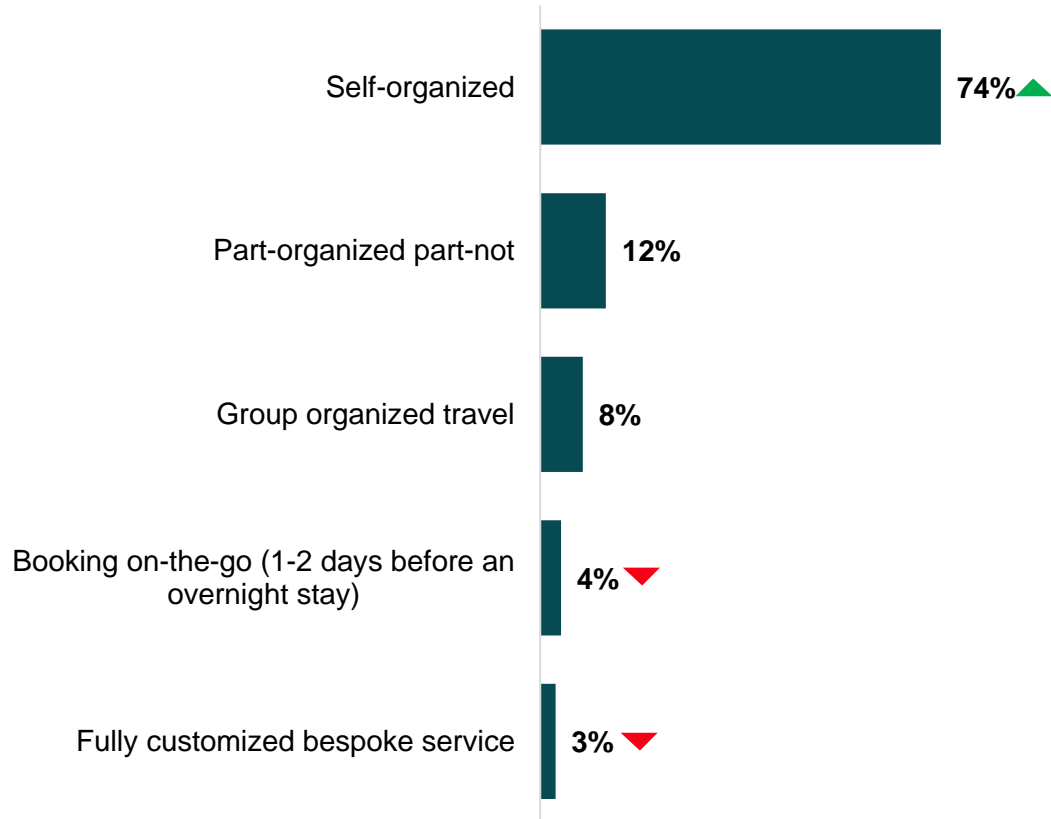
Select Vacation Organization Habits (Trended)

Self-organized line:
- 2021 Q1: 83% ▼
- 2021 Q2: 79% ▼
- 2021 Q3: 74%
- 2021 Q4: 74%
- 2022 Q1: 75%
- 2022 Q2: 73%
- 2022 Q3: 73%
- 2022 Q4: 72%
- 2023 Q1: 74%
- 2023 Q2: 73%
- 2023 Q3: 75%
- 2023 Q4: 76%

Booking on-the-go (1-2 days before an overnight stay) line:
- 2021 Q1: 7%
- 2021 Q2: 7%
- 2021 Q3: 6%
- 2021 Q4: 5%
- 2022 Q1: 5%
- 2022 Q2: 5%
- 2022 Q3: 5%
- 2022 Q4: 4%
- 2023 Q1: 4%
- 2023 Q2: 4%
- 2023 Q3: 3% ▼
- 2023 Q4: 4%

— Self-organized
— Booking on-the-go (1-2 days before an overnight stay)

2023 Base: French 18+ (n=14,228)
2021-2023 Quarterly Trending Base Range: French 18+ (n=3,101-3,667)
Q: Which of the following, if any, describe how you generally organize your vacations?
Please select all that apply.

YouGov Global Travel Profiles (France) – 2023

▲ / ▼ = significantly higher/lower result (vs. 2022) | ▲ / ▼ = significantly higher/lower result (vs. previous quarter)

Accommodation Type Typically Stayed At

French travellers predominantly opt for rental accommodations during vacations, showcasing a preference for personalized stays. Their enjoyment of going off the beaten track is emphasized with one in five typically choosing to stay at campsites when travelling

Accommodation Type Typically Stayed At

Accommodation Type	%
Rented apartment/house	40%
Standard hotel/motel/condominium (3 star or below)	33%
Staying with family/friend	33% ▼
Campsite	21%
Luxury hotel/condominium/resort (4 or 5 star)	20% ▲
Bed & Breakfast	16%
Rented room in other people's home	8%
Stay in a property I own (e.g. second home)	7%
Campervan	4%
Cruise Ship	4%
Hostel	3% ▼
Couchsurfing	1% ▼

Select Accommodation Types (Trended)

Rented apartment/house: 49% (2021 Q1), 43% ▼ (Q2), 41% (Q3), 41% (Q4), 42% (2022 Q1), 41% (Q2), 39% (Q3), 40% (Q4), 40% (2023 Q1), 40% (Q2), 40% (Q3), 41% (Q4)

Campsite: 27% (2021 Q1), 24% ▼ (Q2), 23% (Q3), 20% ▼ (Q4), 22% ▲ (2022 Q1), 22% (Q2), 22% (Q3), 21% ▼ (Q4), 21% (2023 Q1), 21% (Q2), 22% (Q3), 21% (Q4)

— **Rented apartment/house**   — **Campsite**

2023 Base: French 18+ (n=14,228)
2021-2023 Quarterly Trending Base Range: French 18+ (n=3,101-3,667)
Q: Which, if any, of the following types of accommodation do you typically stay in when you are on vacation? Please select all that apply

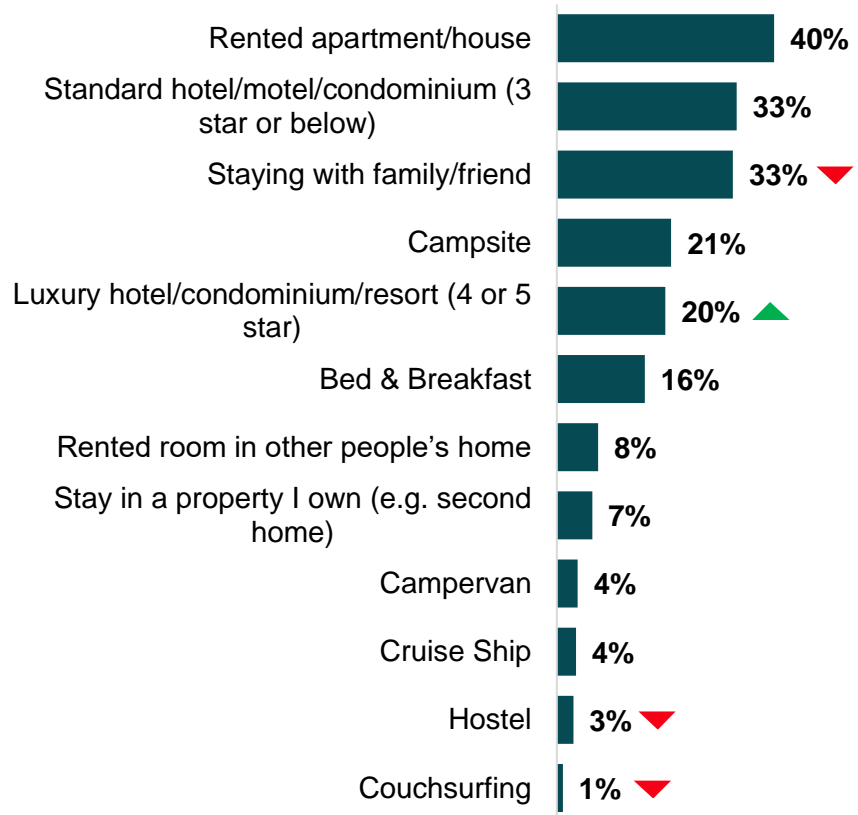▲ / ▼ = significantly higher/lower result (vs. 2022) | ▲ / ▼ = significantly higher/lower result (vs. previous quarter)

Accommodation Booking Methods

French typically use third party accommodation booking sites, reflecting their preference toward staying at a rented apartment/house when travelling

Accommodation Booking Methods

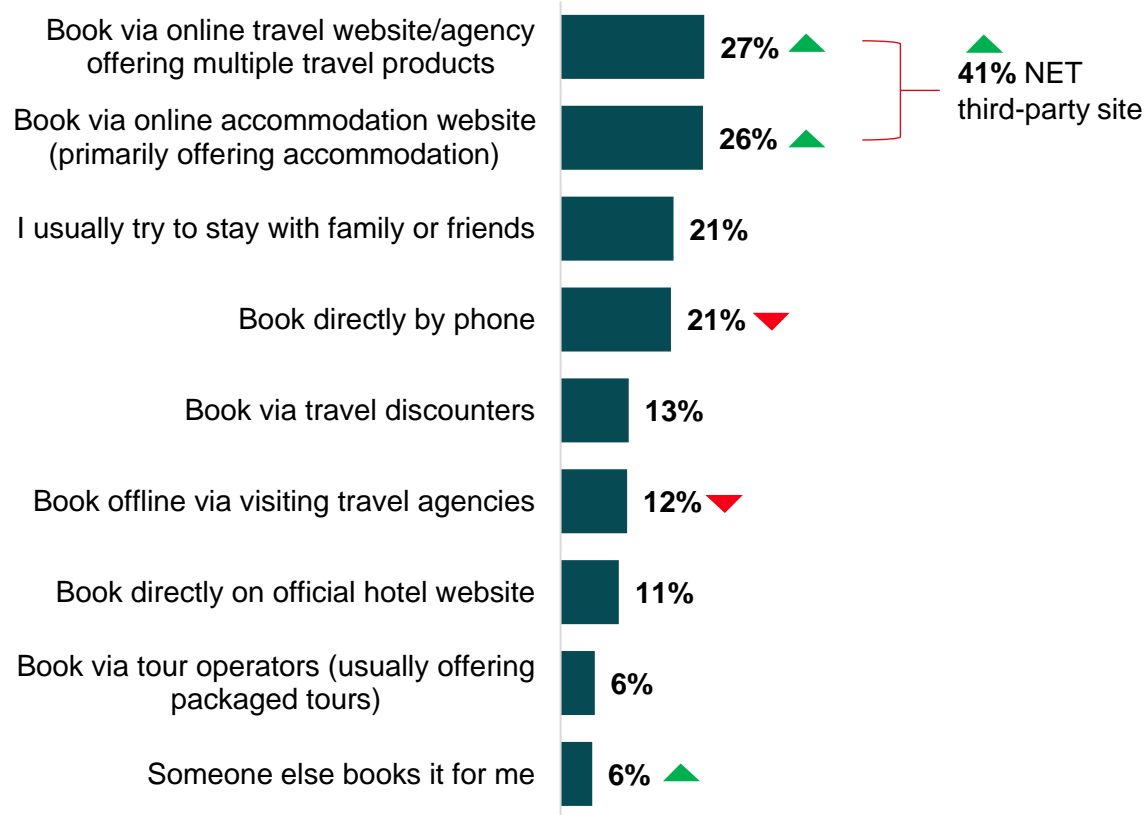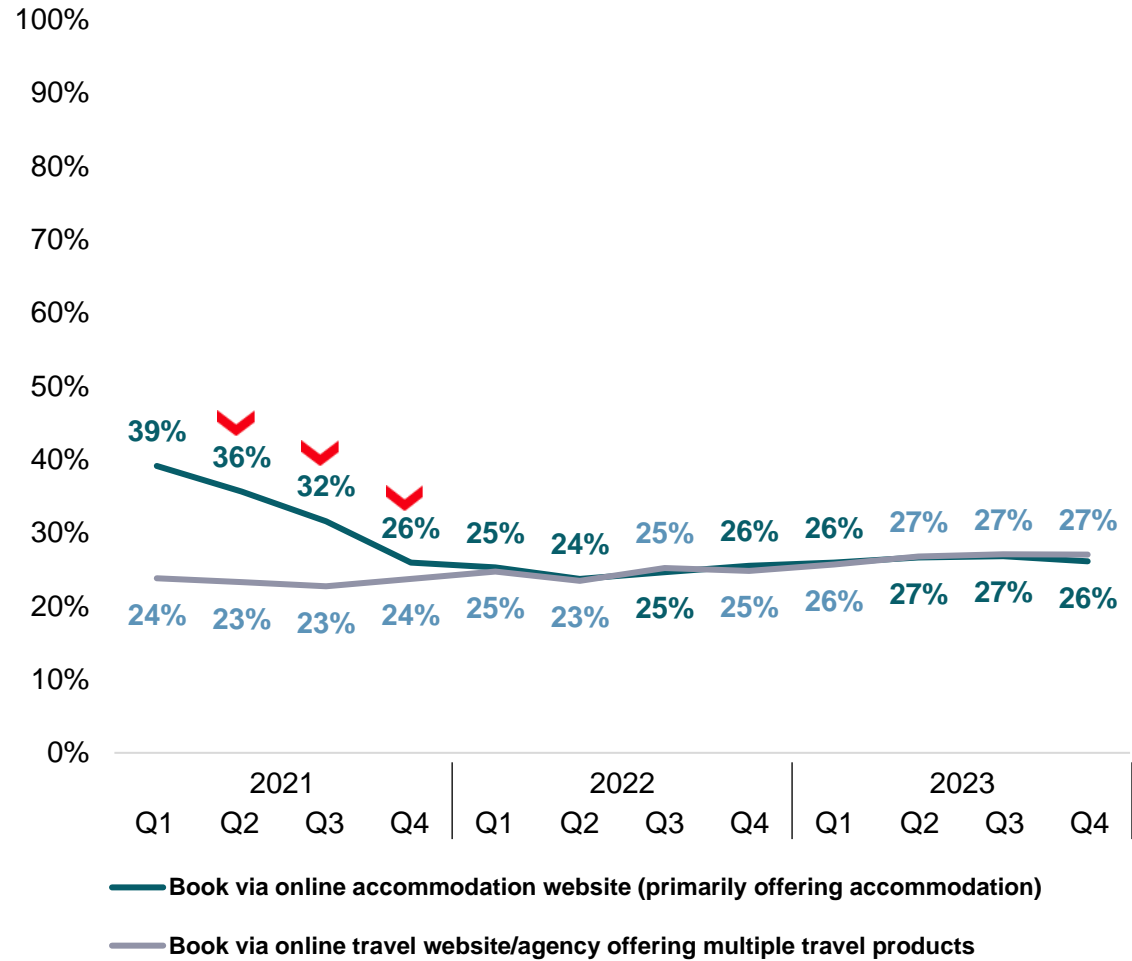| Method	%
Book via online travel website/agency offering multiple travel products	27% ▲
Book via online accommodation website (primarily offering accommodation)	26% ▲
I usually try to stay with family or friends	21%
Book directly by phone	21% ▼
Book via travel discounters	13%
Book offline via visiting travel agencies	12% ▼
Book directly on official hotel website	11%
Book via tour operators (usually offering packaged tours)	6%
Someone else books it for me	6% ▲

41% NET third-party site ▲

Select Accommodation Booking Methods (Trended)

Book via online accommodation website (primarily offering accommodation): 39%, 36%, 32%, 26%, 25%, 24%, 25%, 26%, 26%, 27%, 27%, 27%

Book via online travel website/agency offering multiple travel products: 24%, 23%, 23%, 24%, 25%, 23%, 25%, 25%, 26%, 27%, 27%, 26%

— **Book via online accommodation website (primarily offering accommodation)**
— **Book via online travel website/agency offering multiple travel products**

▲ / ▼ = significantly higher/lower result (vs. 2022) | ⋀ / ⋁ = significantly higher/lower result (vs. previous quarter)
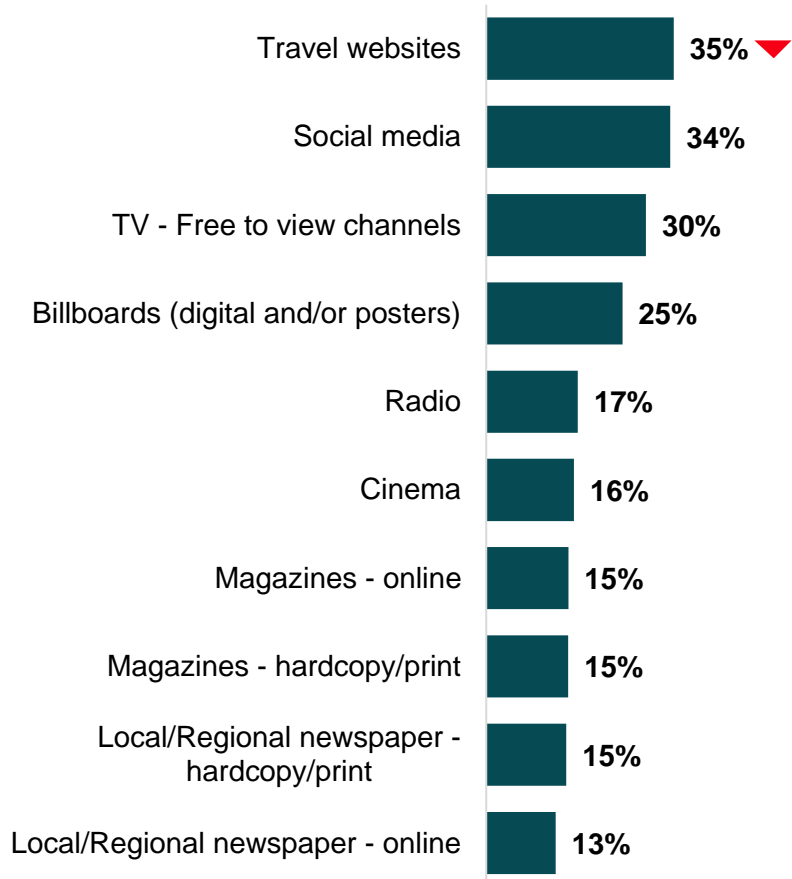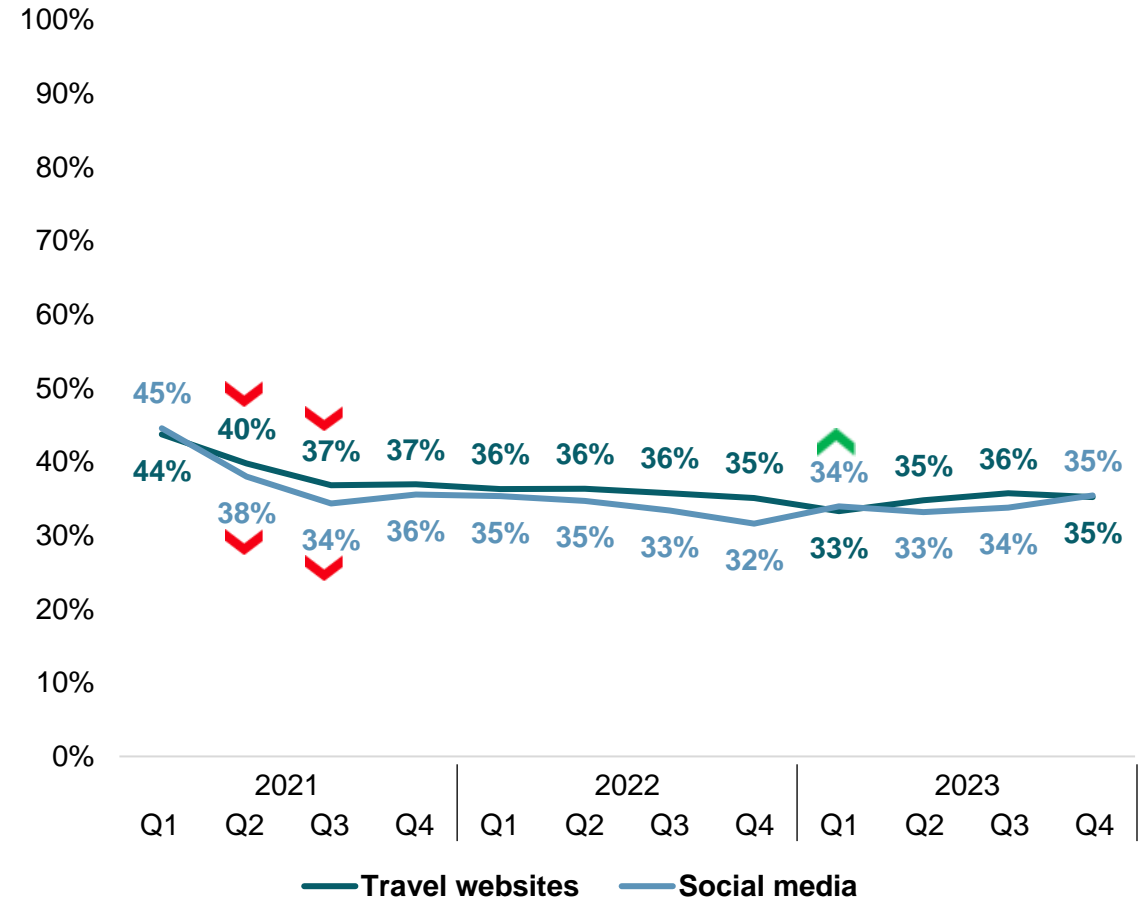
Effective Types of Travel Advertising

French highlight travel websites and social media as the best advertising channels for capturing their attention; scores for which have been near equal with each other for the last three years

Effective Types of Travel Advertising (Top Responses)

Travel websites	35% ▼
Social media	34%
TV - Free to view channels	30%
Billboards (digital and/or posters)	25%
Radio	17%
Cinema	16%
Magazines - online	15%
Magazines - hardcopy/print	15%
Local/Regional newspaper - hardcopy/print	15%
Local/Regional newspaper - online	13%

Select Types of Travel Advertising (Trended)

Travel websites: 44% 40% 37% 37% 36% 36% 36% 35% 34% 35% 36% 35%

Social media: 45% ▼ ▼ 38% 34% ▼ 36% 35% 35% 33% 32% 33% 33% 34% 35%

(2021 Q1–Q4, 2022 Q1–Q4, 2023 Q1–Q4)

— **Travel websites** — **Social media**

2023 Base: French 18+ (n=14,228)
2021-2023 Quarterly Trending Base Range: French 18+ (n=2,446-7,219)
Q: Thinking about your next travel- or vacation-related purchase, if you were a travel/vacation provider where would you advertise to catch your attention? Please select all that apply.

18

YouGov Global Travel Profiles (France) – 2023

▲ / ▼ = significantly higher/lower result (vs. 2022) | ▲ / ▼ = significantly higher/lower result (vs. previous quarter)

Performance of Canada in 2023 vs. Competitors

Yellowknife
Northwest Territories

Performance Scorecard for Canada
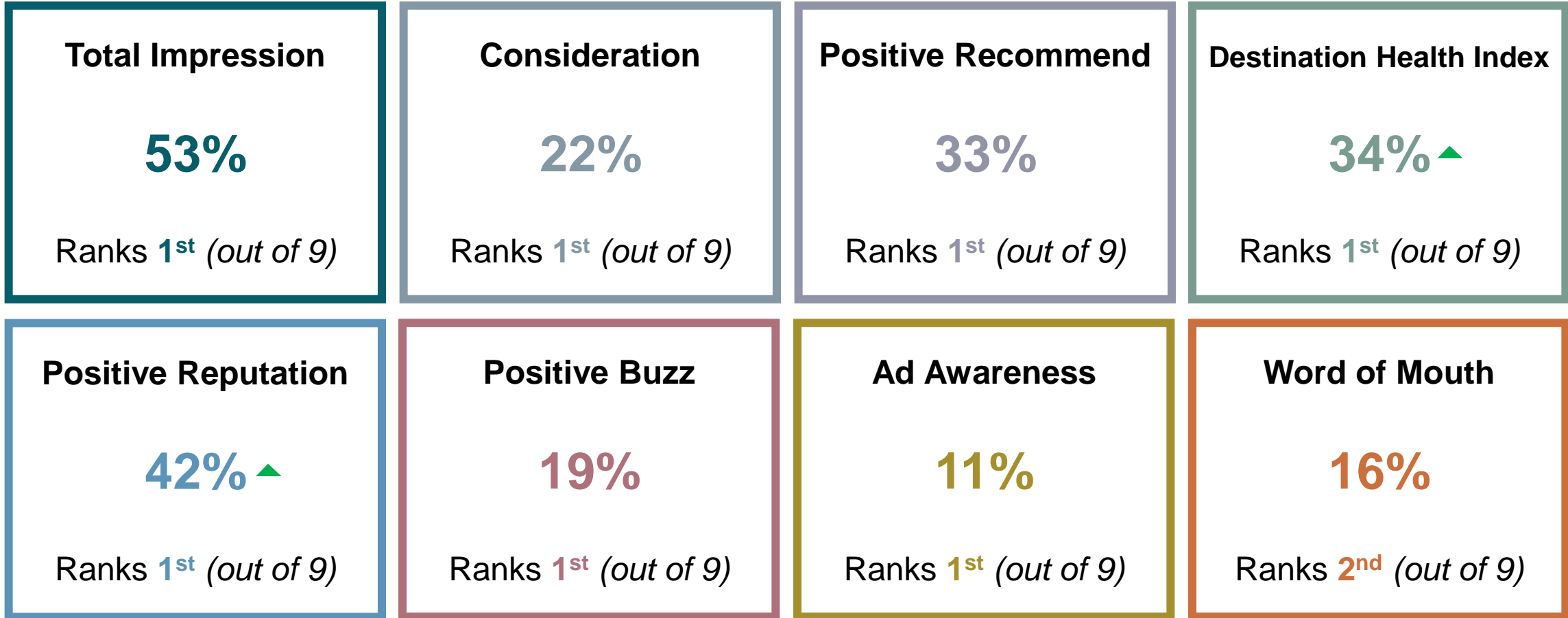
DESTINATION CANADA

Metric	Definition	Question Text
Total Impression	The degree to which consumers feel they know and understand a brand, beyond just being aware of its existence. Total impression = positive + negative impression	Overall, of which of the following destinations do you have a POSITIVE impression? / Now which of the following destinations do you have an overall NEGATIVE impression?
Consideration	The number of consumers who would consider the destination when they are next in market to plan a vacation.	When you are in the market next to plan a vacation or a fun day out for yourself / your family, which destinations would you consider?
Positive Recommend	How likely consumers are to recommend a destination to a friend or colleague.	Which of the following destinations would you RECOMMEND to a friend or colleague?
Destination Health Index	Overall measure of a destination's brand health across several key destination health metrics.	Average of Positive Impression, Positive Reputation, Positive Quality, Positive Value, Positive Satisfaction, Positive Recommend
Positive Reputation	How much consumers like and respect a destination.	Which of the following destinations do you regard as having a GOOD reputation for vacations?
Positive Buzz	How much positive news coverage consumers are hearing about a destination.	Over the PAST TWO WEEKS, which of the following destinations have you heard something POSITIVE about (whether in the news, through advertising, or talking to friends and family)?
Ad Awareness	How much advertising consumers have seen for a destination.	Which of the following destinations have you seen an advertisement for in the PAST TWO WEEKS?
Word of Mouth	How much consumers are talking about a destination.	Which of the following destinations have you talked about with friends and family in the PAST TWO WEEKS (whether in-person, online, or through social media)?

Performance Scorecard for Canada

Canada was the top performing destination in France in 2023, ranking 1st (out of 9 destinations) in seven of eight key performance metrics and in the top two for all metrics. Scores also increased for positive reputation and overall destination health

Total Impression	**Consideration**	**Positive Recommend**	**Destination Health Index**
53%	**22%**	**33%**	**34%** ▲
Ranks **1st** *(out of 9)*	Ranks **1st** *(out of 9)*	Ranks **1st** *(out of 9)*	Ranks **1st** *(out of 9)*

Positive Reputation	**Positive Buzz**	**Ad Awareness**	**Word of Mouth**
42% ▲	**19%**	**11%**	**16%**
Ranks **1st** *(out of 9)*	Ranks **1st** *(out of 9)*	Ranks **1st** *(out of 9)*	Ranks **2nd** *(out of 9)*

Base: French 18+ (n=6,091)

▲ / ▼ = significantly higher/lower result (vs. 2022)

2023 Annual Scores

Canada continues to be the top performing long-haul destination in most key performance metrics; however, Japan saw the most growth in 2023, improving on every metric. China, Thailand and Iceland also had year-over-year improvement on at least one metric

	Canada	US	Iceland	Japan	Thailand	Australia	Mexico	India	China
Total Impression	53%	44%	37%	38% ▲	35%	38%	29%	21%	28%
Consideration	22%	16%	14%	14% ▲	13% ▲	10%	9%	3%	3%
Positive Recommend	33%	25%	21%	22% ▲	19%	19%	14%	7%	6%
Destination Health Index	34% ▲	24%	21%	21% ▲	21%	21%	14%	7%	6% ▲
Positive Reputation	42% ▲	30%	27% ▲	27% ▲	33%	29%	24%	9% ▼	7% ▲
Positive Buzz	19%	13%	10%	13% ▲	11%	9%	6% ▼	3%	3%
Ad Awareness	11%	10%	6%	7% ▲	8%	5%	4%	2%	2%
Word of Mouth	16%	17%	7%	11% ▲	9%	7%	7%	3%	4% ▼

Shadow added to highest scoring destination for each metric
Base: French 18+ (n=6,072-6,645)

YouGov DestinationIndex (France) – 2023

▲ / ▼ = significantly higher/lower result (vs. 2022)

Total Impression: Positive + Negative Impression (Trended)

DESTINATION CANADA

Canada has a substantial lead over the rest of the competitive set for total impression. The growth Japan experienced in 2023 began right away in Q1 and peaked in Q2

Total Impression

Legend: Canada — United States — Japan — Australia

Canada data points: 56%, 53%, 52%, 56%, 51%, 51%, 55%, 50%, 55%, 50%, 53%, 54%

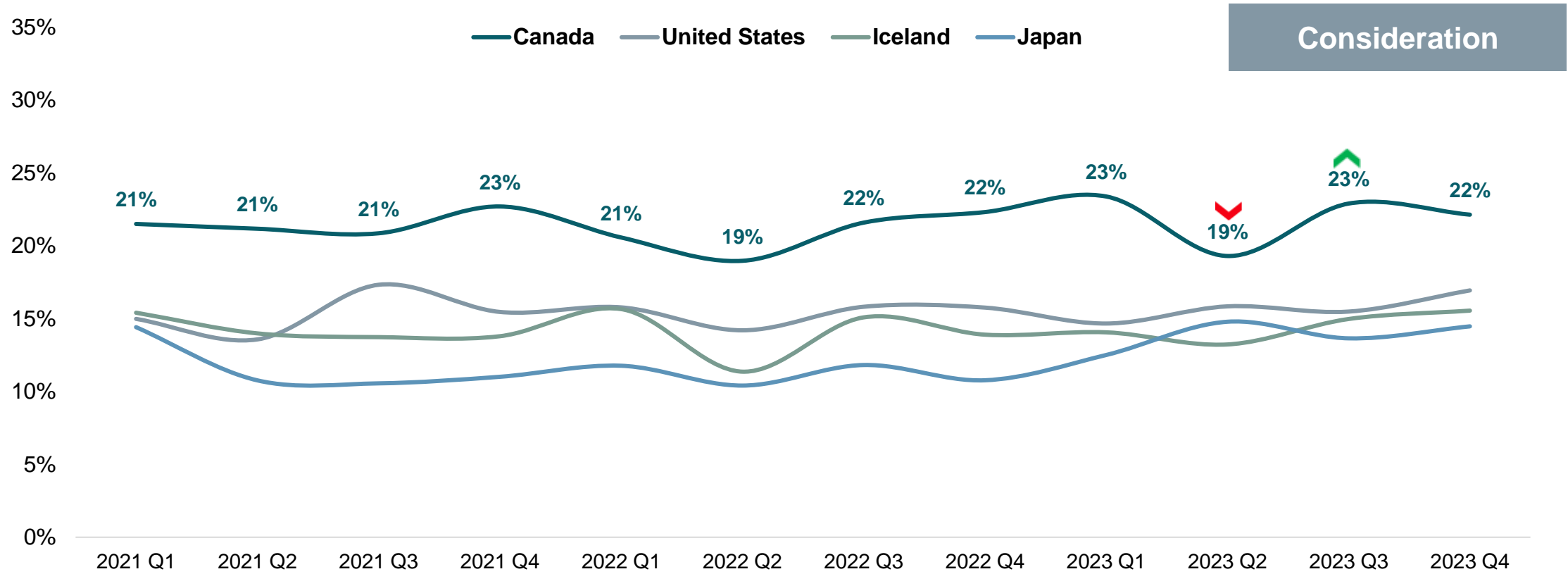|	2021 Q1	2021 Q2	2021 Q3	2021 Q4	2022 Q1	2022 Q2	2022 Q3	2022 Q4	2023 Q1	2023 Q2	2023 Q3	2023 Q4
Canada's Rank	#1	#1	#1	#1	#1	#1	#1	#1	#1	#1	#1	#1
Top Ranked Destination	Canada	Canada	Canada	Canada	Canada	Canada	Canada	Canada	Canada	Canada	Canada	Canada

2021-2023 Quarterly Trending Base Range: French 18+ (n=1,346-1,905)
Q: Overall, of which of the following destinations do you have a POSITIVE impression? / Now which of the following destinations do you have an overall NEGATIVE impression?

YouGov DestinationIndex (France) – 2023

△ / ▽ = significantly higher/lower result (vs. previous quarter)

Consideration (Trended)

One in five French are considering Canada for their next vacation, potentially benefitting from having less of a language barrier than other competitors. Consideration of Canada dipped in 2023 Q2, coinciding with an increase for Japan

Legend: Canada — United States — Iceland — Japan

Consideration

Canada line values: 21%, 21%, 21%, 23%, 21%, 19%, 22%, 22%, 23%, 19%, 23%, 22%

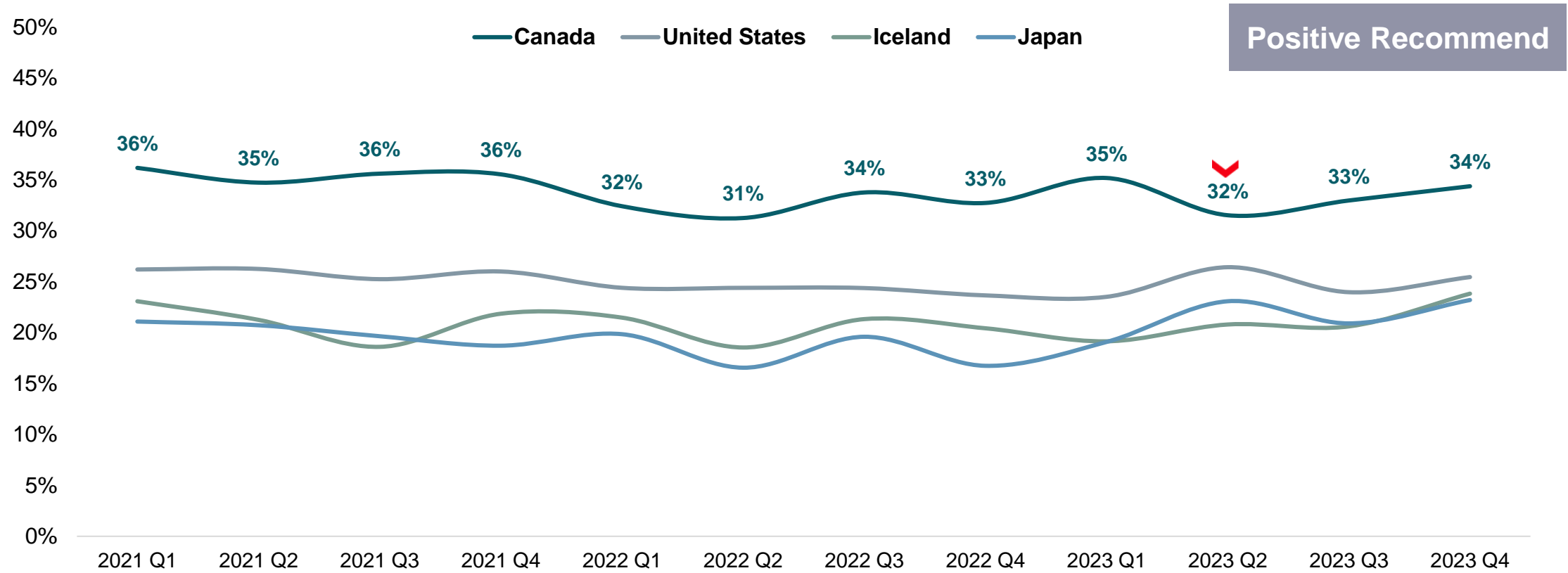|	2021 Q1	2021 Q2	2021 Q3	2021 Q4	2022 Q1	2022 Q2	2022 Q3	2022 Q4	2023 Q1	2023 Q2	2023 Q3	2023 Q4
Canada's Rank	#1	#1	#1	#1	#1	#1	#1	#1	#1	#1	#1	#1
Top Ranked Destination	Canada	Canada	Canada	Canada	Canada	Canada	Canada	Canada	Canada	Canada	Canada	Canada

2021-2023 Quarterly Trending Base Range: French 18+ (n=1,346-1,905)
Q: When you are in the market next to plan a vacation or a fun day out for yourself / your family, which destinations would you consider?

YouGov DestinationIndex (France) – 2023

▲ / ▼ = significantly higher/lower result (vs. previous quarter)

Positive Recommend (Trended)

One in three French would recommend Canada as a destination to a friend or colleague

Legend: Canada — United States — Iceland — Japan

Positive Recommend

Canada values (dark teal line): 36%, 35%, 36%, 36%, 32%, 31%, 34%, 33%, 35%, 32%, 33%, 34%

	2021 Q1	2021 Q2	2021 Q3	2021 Q4	2022 Q1	2022 Q2	2022 Q3	2022 Q4	2023 Q1	2023 Q2	2023 Q3	2023 Q4
Canada's Rank	#1	#1	#1	#1	#1	#1	#1	#1	#1	#1	#1	#1
Top Ranked Destination	Canada	Canada	Canada	Canada	Canada	Canada	Canada	Canada	Canada	Canada	Canada	Canada

2021-2023 Quarterly Trending Base Range: French 18+ (n=1,346-1,905)
Q: Which of the following destinations would you RECOMMEND to a friend or colleague?

YouGov DestinationIndex (France) – 2023

⌄ / ⌄ = significantly higher/lower result (vs. previous quarter)

Destination Health Index (Trended)

Overall destination health of Canada is very strong, often at least 7-percentage points higher than the next closest competitor
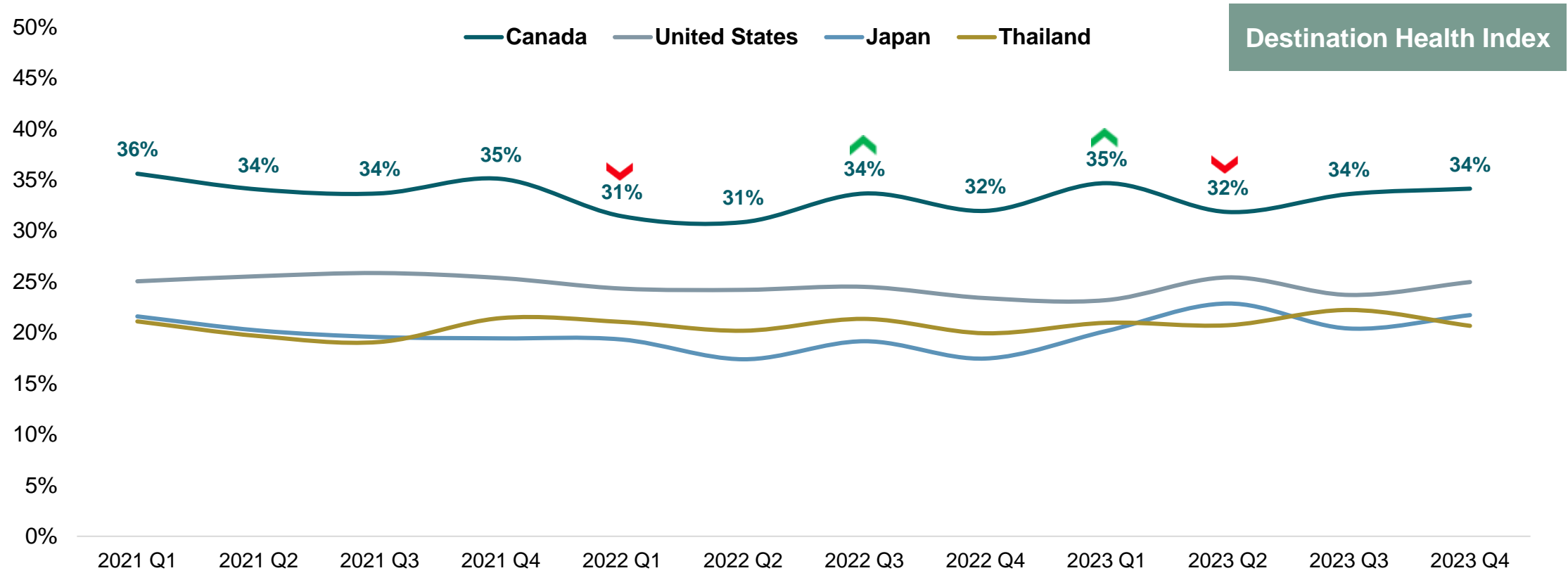
Destination Health Index

Legend: Canada — United States — Japan — Thailand

Canada values: 36% (2021 Q1), 34% (2021 Q2), 34% (2021 Q3), 35% (2021 Q4), 31% ▼ (2022 Q1), 31% (2022 Q2), 34% ▲ (2022 Q3), 32% (2022 Q4), 35% ▲ (2023 Q1), 32% ▼ (2023 Q2), 34% (2023 Q3), 34% (2023 Q4)

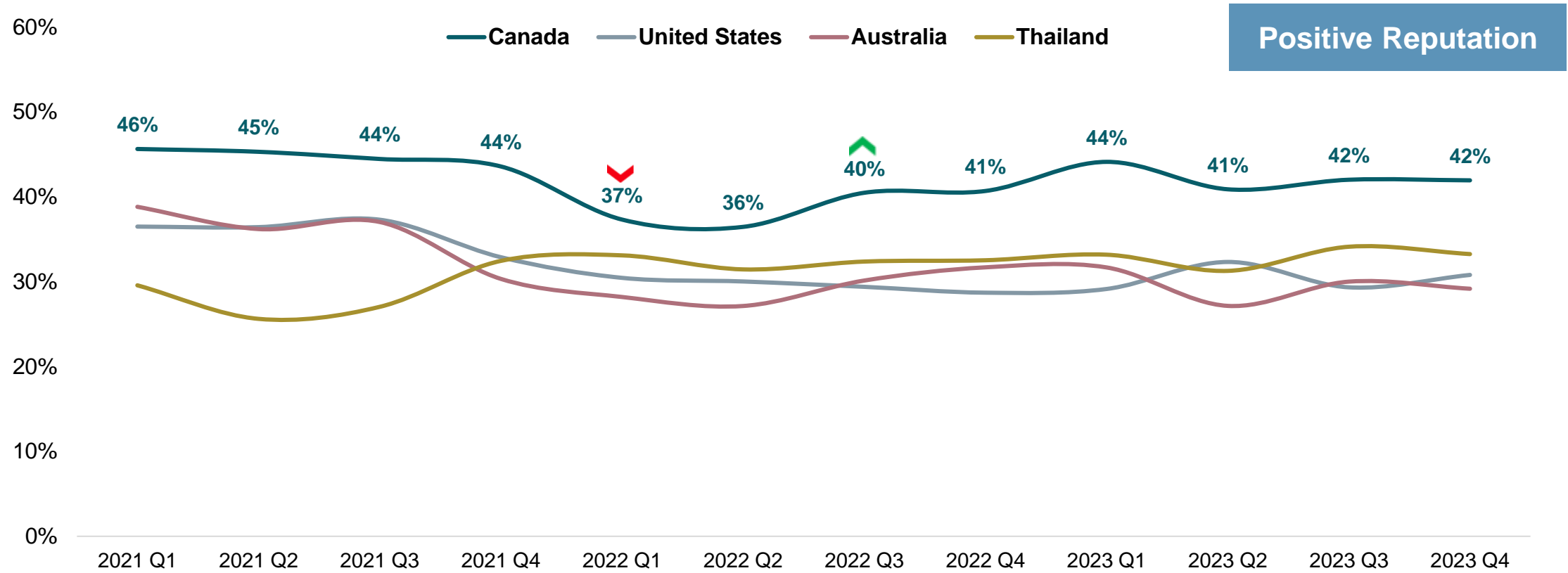|	2021 Q1	2021 Q2	2021 Q3	2021 Q4	2022 Q1	2022 Q2	2022 Q3	2022 Q4	2023 Q1	2023 Q2	2023 Q3	2023 Q4
Canada's Rank	#1	#1	#1	#1	#1	#1	#1	#1	#1	#1	#1	#1
Top Ranked Destination	Canada	Canada	Canada	Canada	Canada	Canada	Canada	Canada	Canada	Canada	Canada	Canada

2021-2023 Quarterly Trending Base Range: French 18+ (n=1,346-1,905)
Q: Average of Positive Impression, Positive Reputation, Positive Quality, Positive Value, Positive Satisfaction, Positive Recommend

YouGov DestinationIndex (France) – 2023

▲ / ▼ = significantly higher/lower result (vs. previous quarter)

Positive Reputation (Trended)

Canada's reputation as a vacation destination improved in 2023 following a dip in early 2022, but has yet to return to levels reported in 2021
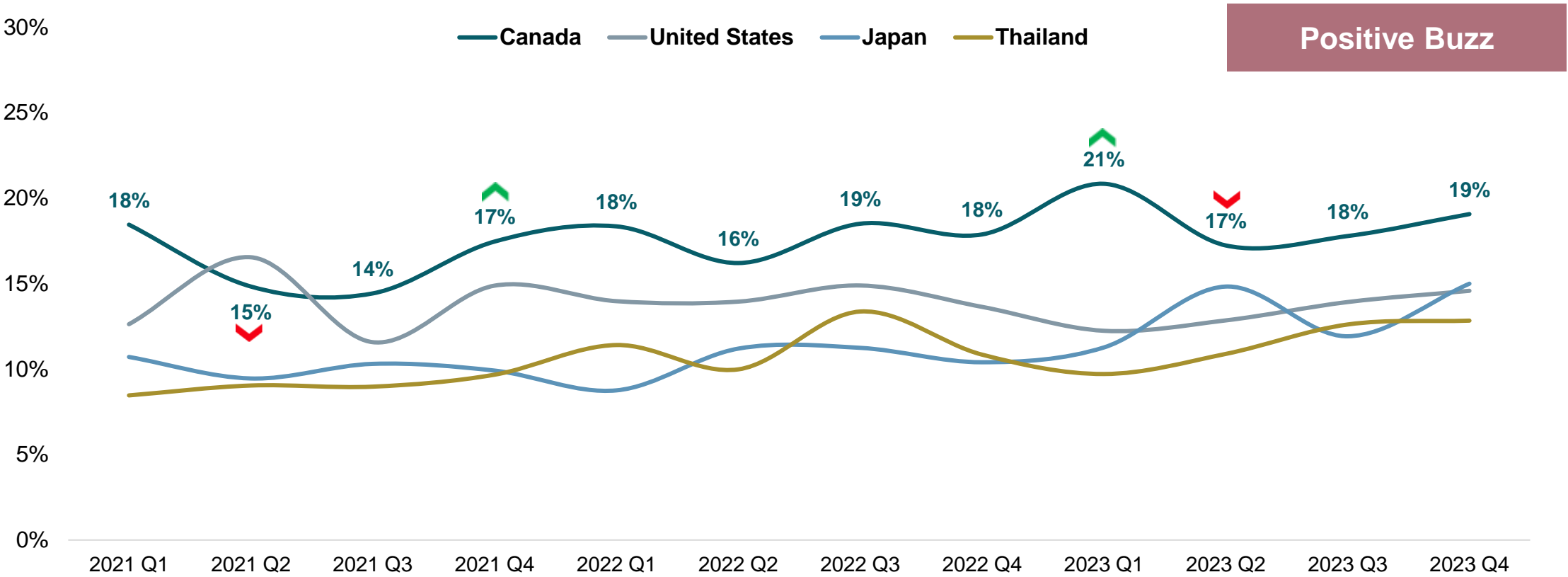

Positive Reputation

Legend: **Canada** — **United States** — **Australia** — **Thailand**

Canada data points: 46%, 45%, 44%, 44%, 37% (↓), 36%, 40% (↑), 41%, 44%, 41%, 42%, 42%

	2021 Q1	2021 Q2	2021 Q3	2021 Q4	2022 Q1	2022 Q2	2022 Q3	2022 Q4	2023 Q1	2023 Q2	2023 Q3	2023 Q4
Canada's Rank	#1	#1	#1	#1	#1	#1	#1	#1	#1	#1	#1	#1
Top Ranked Destination	Canada	Canada	Canada	Canada	Canada	Canada	Canada	Canada	Canada	Canada	Canada	Canada

2021-2023 Quarterly Trending Base Range: French 18+ (n=1,346-1,905)
Q: Which of the following destinations do you regard as having a GOOD reputation for vacations?

YouGov DestinationIndex (France) – 2023

↑ / ↓ = significantly higher/lower result (vs. previous quarter)

Positive Buzz (Trended)

Buzz for Canada remains positive, leading the competitive set; scores for Canada tend to be lowest in Q2

Positive Buzz

Legend: Canada — United States — Japan — Thailand

Canada values shown on line: 18%, 15%, 14%, 17%, 18%, 16%, 19%, 18%, 21%, 17%, 18%, 19%

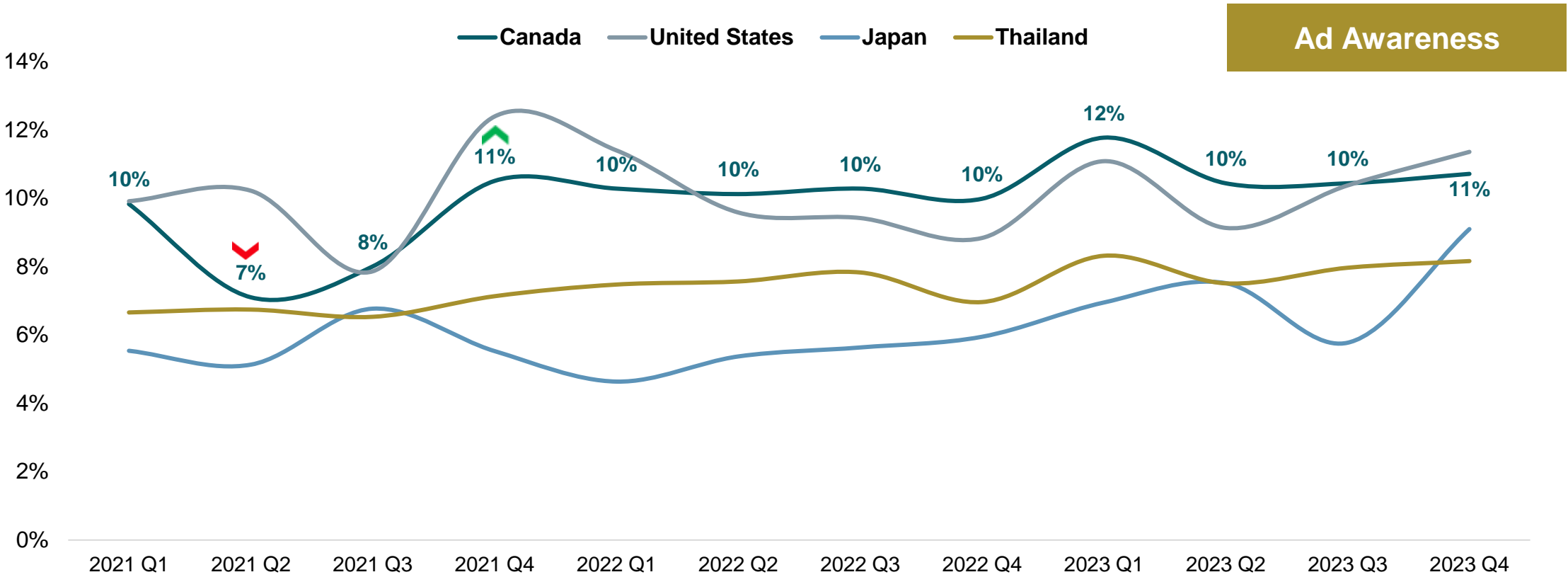|	2021 Q1	2021 Q2	2021 Q3	2021 Q4	2022 Q1	2022 Q2	2022 Q3	2022 Q4	2023 Q1	2023 Q2	2023 Q3	2023 Q4
Canada's Rank	#1	#2	#1	#1	#1	#1	#1	#1	#1	#1	#1	#1
Top Ranked Destination	Canada	**US**	Canada	Canada	Canada	Canada	Canada	Canada	Canada	Canada	Canada	Canada

2021-2023 Quarterly Trending Base Range: French 18+ (n=1,346-1,905)
Q: Over the PAST TWO WEEKS, which of the following destinations have you heard something POSITIVE about (whether in the news, through advertising, or talking to friends and family)?

YouGov DestinationIndex (France) – 2023

⌃ / ⌄ = significantly higher/lower result (vs. previous quarter)

Ad Awareness (Trended)

While Canada's scores are high across all key performance metrics, it maintained only a nominal lead in ad recall in 2023 and lost its top rank to the US in 2023 Q4. Japan's ad awareness increased significantly year-over-year and appears to be effective given the increases in all key performance metrics
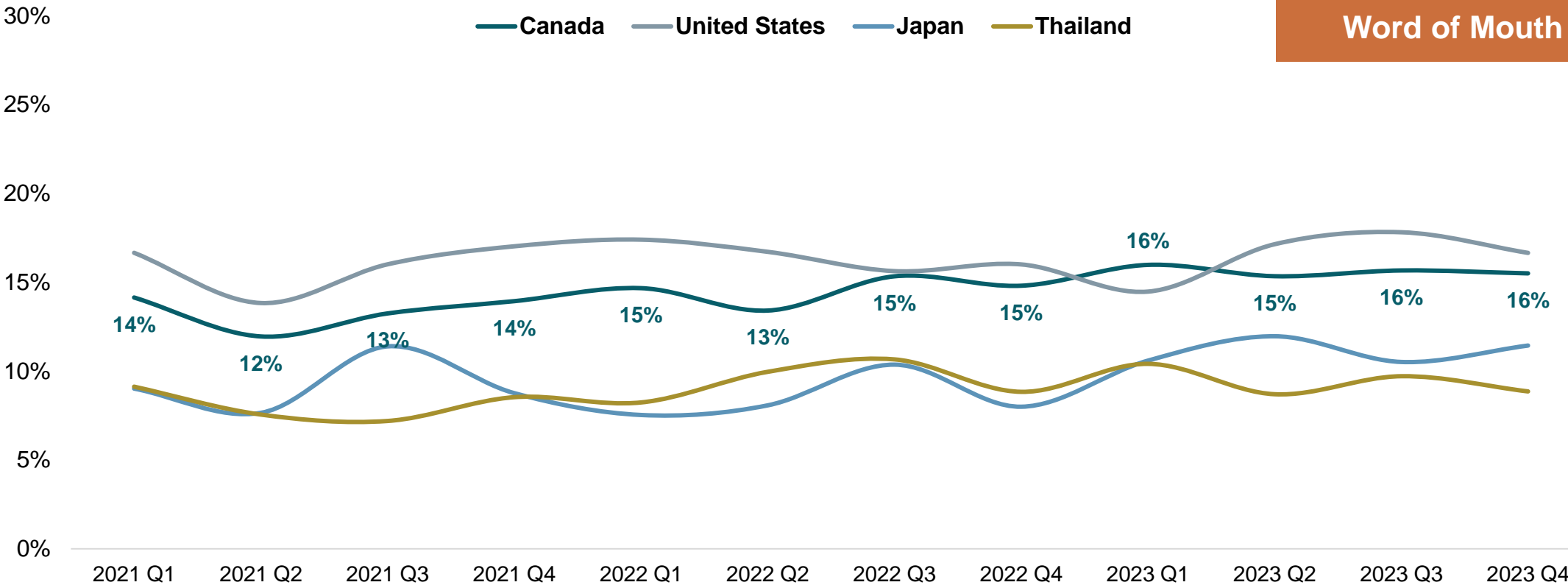

Ad Awareness

	2021 Q1	2021 Q2	2021 Q3	2021 Q4	2022 Q1	2022 Q2	2022 Q3	2022 Q4	2023 Q1	2023 Q2	2023 Q3	2023 Q4
Canada's Rank	#2	#2	#1	#2	#2	#1	#1	#1	#1	#1	#1	#2
Top Ranked Destination	**US**	**US**	Canada	**US**	**US**	Canada	Canada	Canada	Canada	Canada	Canada	**US**

2021-2023 Quarterly Trending Base Range: French 18+ (n=1,346-1,905)
Q: Which of the following destinations have you seen an advertisement for in the PAST TWO WEEKS?

YouGov DestinationIndex (France) – 2023

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Word of Mouth (Trended)

Word of mouth is the only metric Canada does not lead in as it trails the US by a few percentage points

DESTINATION CANADA

Word of Mouth

Legend: Canada — United States — Japan — Thailand

Canada data labels: 14%, 12%, 13%, 14%, 15%, 13%, 15%, 15%, 16%, 15%, 16%, 16%

	2021 Q1	2021 Q2	2021 Q3	2021 Q4	2022 Q1	2022 Q2	2022 Q3	2022 Q4	2023 Q1	2023 Q2	2023 Q3	2023 Q4
Canada's Rank	#2	#2	#2	#2	#2	#2	#2	#2	#1	#2	#2	#2
Top Ranked Destination	US	US	US	US	US	US	US	US	Canada	US	US	US

2021-2023 Quarterly Trending Base Range: French 18+ (n=1,346-1,905)
Q: Which of the following destinations have you talked about with friends and family in the PAST TWO WEEKS (whether in-person, online, or through social media)?

YouGov DestinationIndex (France) – 2023

⌃ / ⌄ = significantly higher/lower result (vs. previous quarter)

THANK YOU

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

DESTINATION CANADA

CANADIAN TOURISM DATA collective