

# 2023 GLOBAL TRAVELLER RESEARCH PROGRAM

## FRANCE HIGHLIGHTS REPORT



Canada



St. John's

Newfoundland & Labrador



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# STUDY OVERVIEW: FRANCE MARKET

## Target Population

The target population are residents who are aged 18 years or more, who have taken a long-haul pleasure holiday and stayed at least four nights in a paid accommodation in the last three years or are thinking about doing so in the next two years.

## Timing of fieldwork

December 13<sup>th</sup>-22<sup>nd</sup> 2023

## Geographical Definition for Qualified Trips

Qualified trips refer to trips taken outside of Europe, North Africa and the Mediterranean

## To note:

In 2023, DC switched research providers to YouGov Canada, with the research program evolving from the previous Global Travel Watch (GTW) to the new Global Traveller Research Program (GTRP). The project has also been migrated over to YouGov's proprietary panel. As a result, no trending is available for the French market.

# Key Insights



Canada is ranked as the second most favoured destination, following the United States, with an immediate potential of 6.9 million visitors over the next two years



French travellers are most likely to visit Canada during the Summer or Fall months in the next two years. In the Winter months, they are twice as likely to visit Québec over other provinces or territories



French travellers are predominantly interested in outdoor activities, including walks, beaches, natural attractions, and parks. They also exhibit a significant interest in local markets



Over the past three years, the majority of travellers to Canada were on a holiday with a spouse or partner



Potential visitors to Canada are keen to engage with Indigenous culture by visiting communities, exploring nature, experiencing traditional cuisine, and learning from Elders

# MARKET SIZING



Kyle  
Saskatchewan



# LONG-HAUL PLEASURE TRAVELLER SIZING



Total population aged 18 years or more<sup>1</sup>

**51,373,500**

X

**Incidence rate:** Long-haul pleasure travellers who have taken a trip in the past 3 years or plan to in the next 2 years<sup>2</sup>

**37.9%**

=



**Size of the Long-haul Pleasure Traveller Population**

**19,470,500**

**This study was conducted among long-haul pleasure travellers, represented by 19.5M French adults aged 18 years or more.**



Essipit  
Québec

Base: General population aged 18+ (n=1047)

<sup>1</sup> Source: Estimates Jan 2020, Institut national de la statistique et des études économiques

<sup>2</sup>Note: Results are from 2023 YouGov Canada Omnibus Survey

# SIZE OF THE POTENTIAL MARKET TO CANADA (NEXT 2 YEARS)



Total potential long-haul pleasure travellers aged 18 years or more

**19,470,500**

X

## Target Market for Canada

Those in the dream to purchase stages of the path to purchase for Canada

**74.0%**

=



Size of the target market

**14,408,000**

X

## Immediate Potential for Canada

Will definitely/very likely visit Canada in the next 2 years<sup>1</sup>

**47.9%**

=



**Immediate potential**

**6,901,500**

Base: Target market for Canada = long-haul pleasure travellers (past 3 years or next 2 years) (n=1504); Immediate potential for Canada = dream to purchase stages for P2P for Canada (n=1113)

7 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) Realistically, how likely are you to take a holiday trip to Canada in the **next 2 years**? (Select one)

<sup>1</sup>Includes respondents likely to visit Canada for a trip of 1 to 3 nights, or a trip of 4 nights or more

The next 2-year immediate potential for Canada is 6.9 million long-haul pleasure travellers.



Grand Manan Island  
New Brunswick

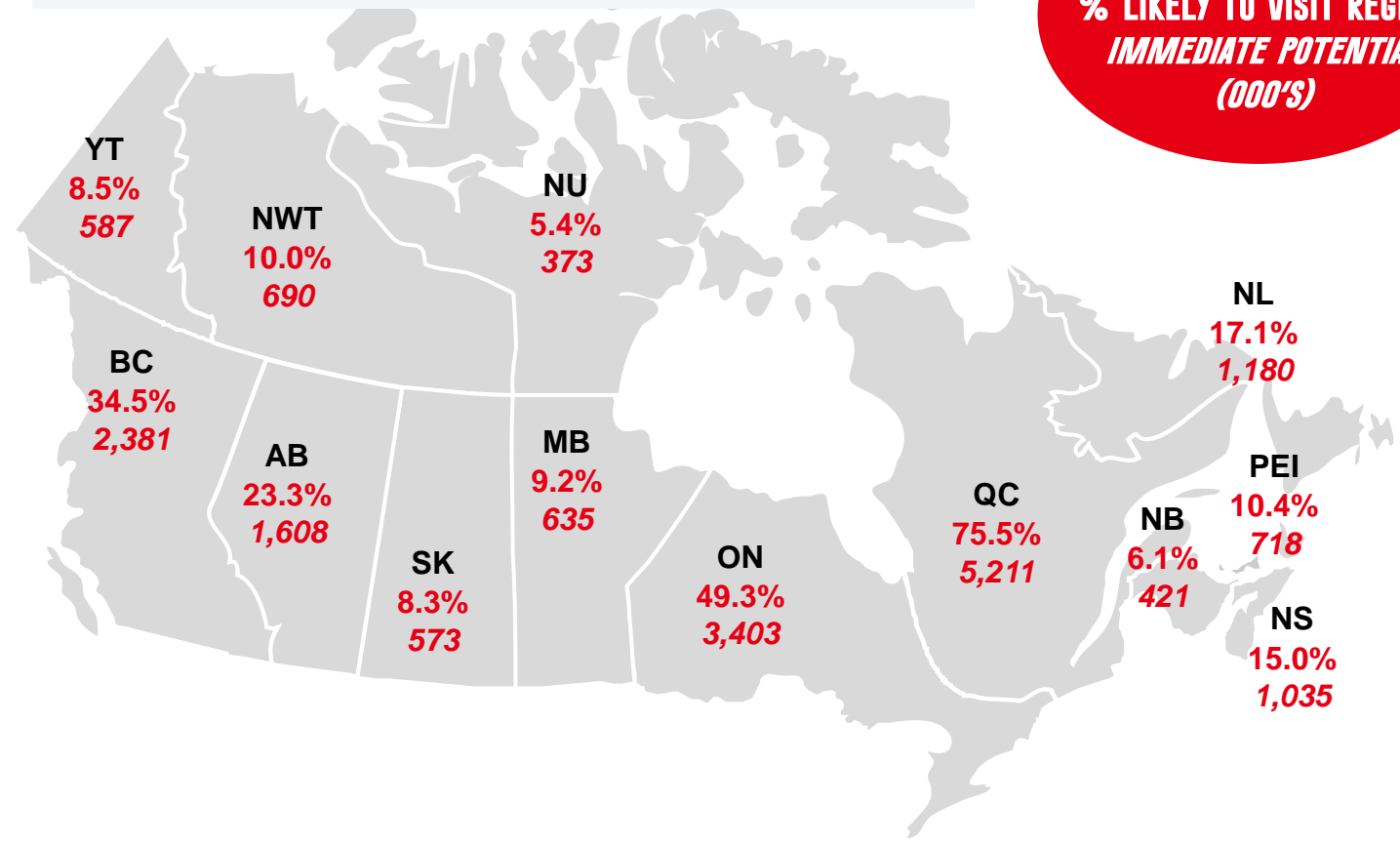
France GTRP –  
December 2023



# POTENTIAL MARKET SIZE FOR THE REGIONS

IMMEDIATE POTENTIAL FOR CANADA: **6,901,500**

**KEY**  
% LIKELY TO VISIT REGION  
IMMEDIATE POTENTIAL  
(000'S)



Québec has the potential to draw in over 5.2 million French travellers over the next 2 years.



 Sunshine Coast  
British Columbia

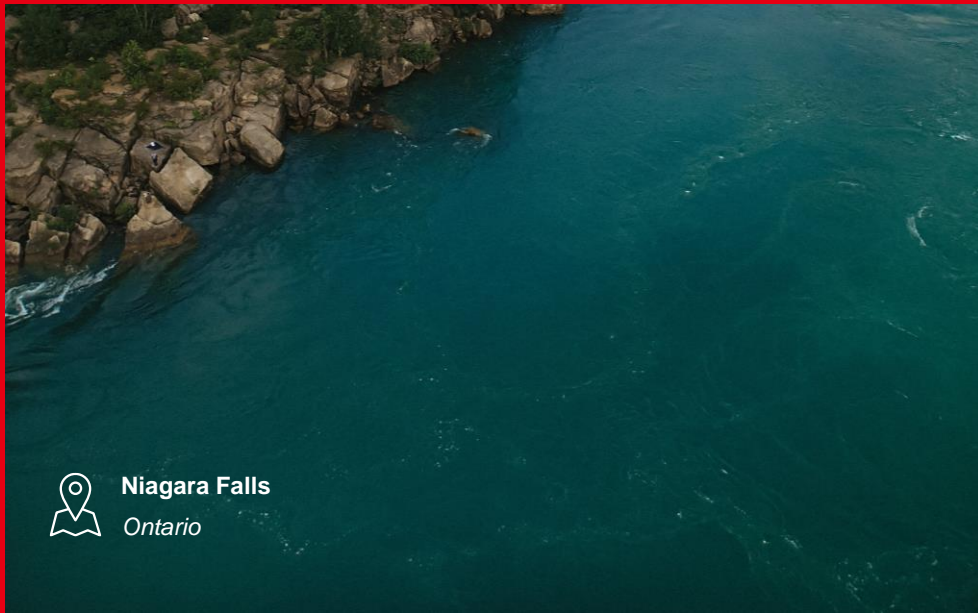
Base: Those in the dream to purchase stages of the path to purchase for Canada and definitely/very likely to take a trip to Canada (n=1113)  
If you were to take a holiday trip to Canada, in the next 2 years, which of the following Canadian provinces or territories are you likely to visit? (Select all that apply)




# TRAVEL DESTINATIONS LIKELY TO VISIT (NEXT 2 YEARS)



Popular travel destinations include Montréal, Québec City, Niagara Falls, and Toronto.



 Niagara Falls  
Ontario

British Columbia	
Vancouver	26%
Rocky Mountains	19%
Victoria	13%
Okanagan	4%
Whistler	4%
Other – BC	4%

Ontario	
Niagara Falls	39%
Toronto	37%
Ottawa	30%
Muskoka	4%
Other – ON	7%

Alberta	
Rocky Mountains	14%
Calgary	10%
Edmonton	6%
Jasper	5%
Banff	4%
Other – AB	3%

Québec	
Montréal	65%
Québec City	58%
Mont Tremblant	19%
Other – QC	24%

Base: Those in the dream to purchase stages of the path to purchase for Canada & definitely/likely to take a trip to Canada (n=1113)  
Within [PROVINCE], which travel destinations are you likely to visit? (Select all that apply)

# TRAVEL DESTINATIONS LIKELY TO VISIT (NEXT 2 YEARS) (CONTINUED)

Saskatchewan	
Regina	4%
Saskatoon	4%
Other – SK	2%

Manitoba	
Winnipeg	5%
Churchill	4%
Other – MB	2%

New Brunswick	
Saint John	3%
Fredericton	2%
Other – NB	2%

Nova Scotia	
Cape Breton	8%
Halifax	8%
Other – NS	5%

Prince Edward Island	
Charlottetown	7%
Other – PEI	5%

Newfoundland & Labrador	
St. John's	10%
Other – NL	8%

Yukon	
Dawson City	4%
Whitehorse	4%
Other – YT	3%

Northwest Territories	
Yellowknife	6%
Inuvik	4%
Other – NWT	4%

Nunavut	
Iqaluit	3%
Other – NU	2%



**The Territories and Atlantic provinces are somewhat less popular, though St. John's, Cape Breton, and Halifax garner some interest.**



10 Base: Those in the dream to purchase stages of the path to purchase for Canada & definitely/likely to take a trip to Canada (n=1113) Within [PROVINCE], which travel destinations 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%	12%	16%	11%
Alberta	4%	8%	9%	8%
Saskatchewan	1%	3%	3%	3%
Manitoba	2%	3%	4%	3%
Ontario	6%	16%	22%	19%
Québec	12%	22%	35%	31%
New Brunswick	0%	2%	3%	3%
Nova Scotia	2%	4%	7%	6%
Prince Edward Island	1%	4%	5%	4%
Newfoundland & Labrador	2%	6%	7%	7%
Yukon	1%	3%	3%	4%
Northwest Territories	1%	4%	5%	3%
Nunavut	1%	2%	2%	2%



**French travellers likely to visit Canada in the next 2 years are most likely to visit during summer or fall. During the winter, French travellers are twice as likely to visit Québec compared to any other province or territory.**





Peggy's Cove  
Nova Scotia



CANADIAN TOURISM DATA  
collective

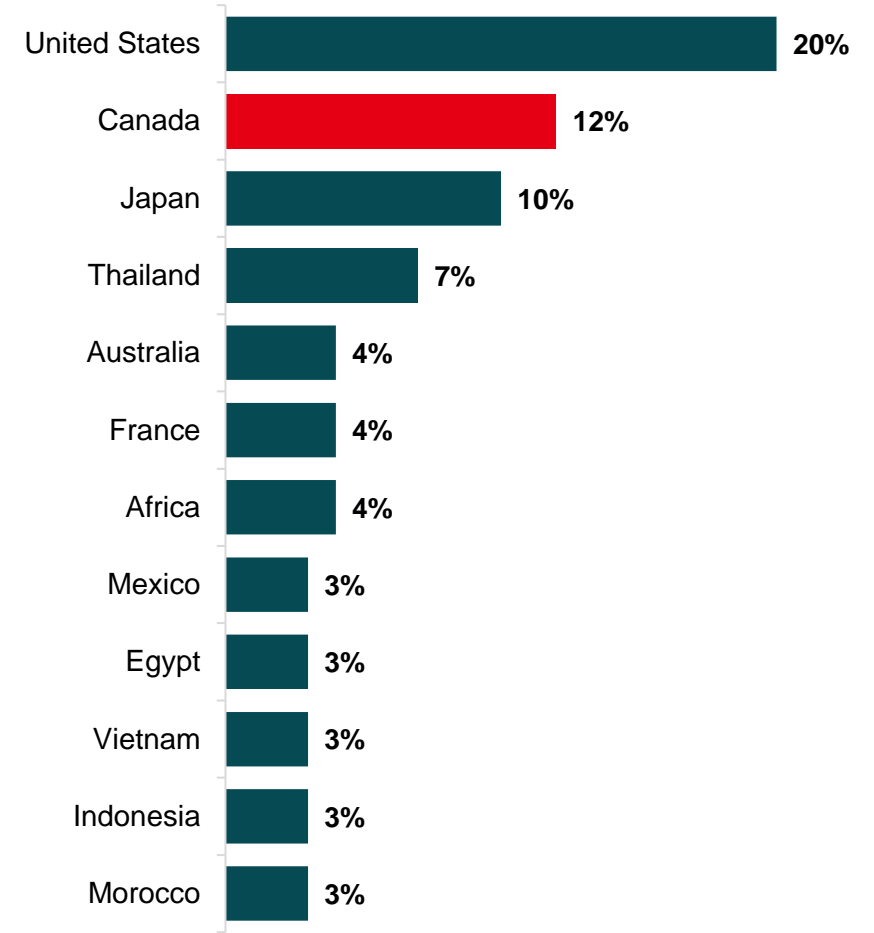


DESTINATION  
CANADA

# CONSIDERING CANADA AS A TRAVEL DESTINATION

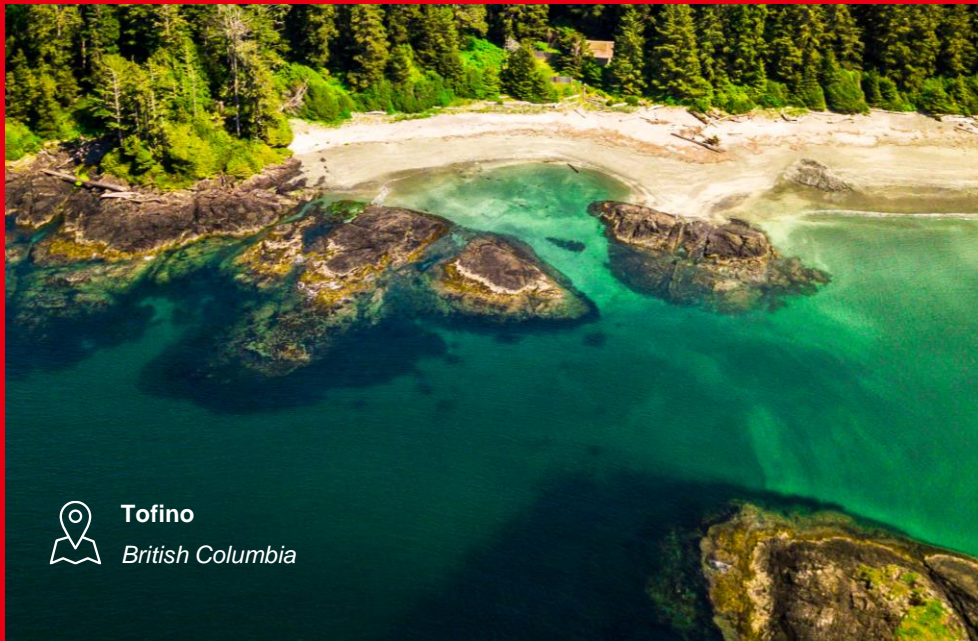
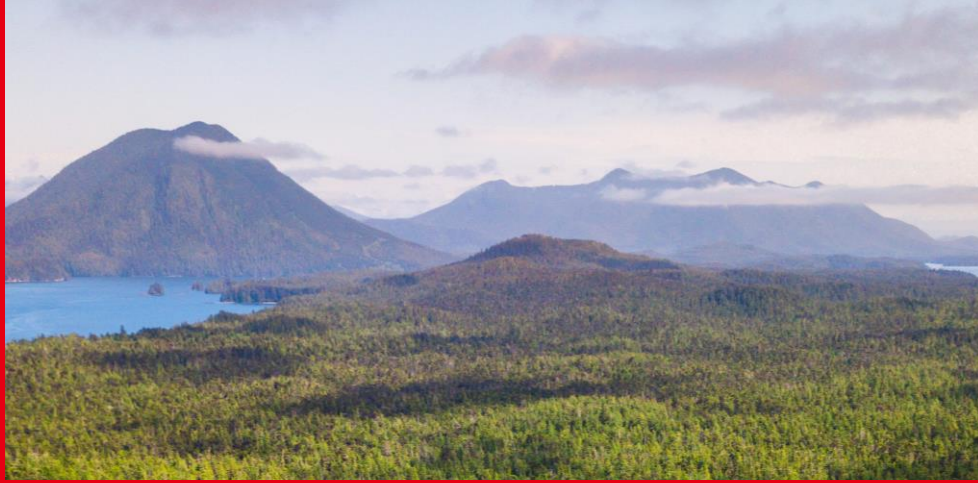


# UNAIDED DESTINATION CONSIDERATION (NEXT 2 YEARS)<sup>1</sup>



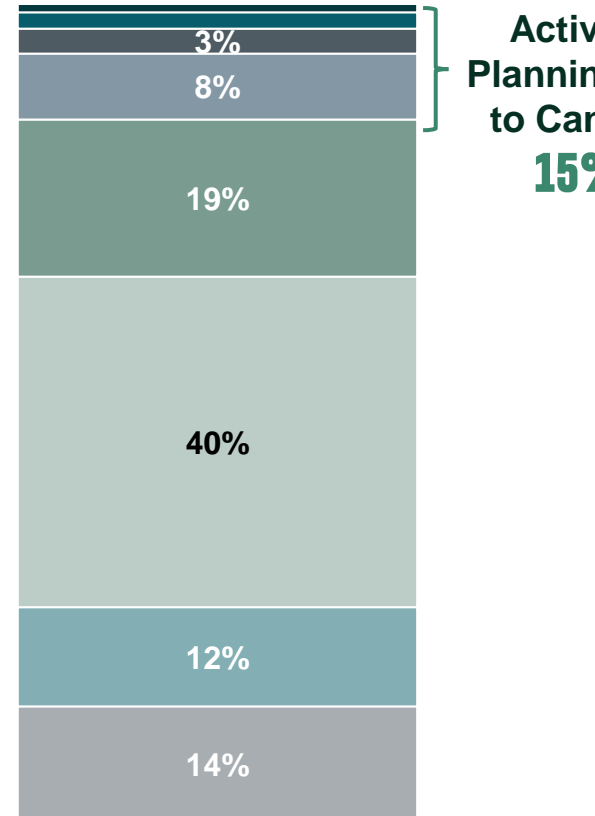
On an unaided basis, Canada is the second most popular destination for consideration among French travellers, behind the United States.

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1504)  
 You mentioned that you are likely to take a long-haul pleasure trip in the next 2 years. Which destinations are you seriously considering? (Please list up to 3 destinations)  
<sup>1</sup>Note: Roll-up of brand mentions by country (e.g., percentage who said "Canada" or any destination in Canada).



# 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



**Fifteen percent of French travellers are actively planning a trip to Canada.**

# TRAVEL BEHAVIOURS



Whitehorse  
Yukon



# TOP 10 GENERAL ACTIVITIES INTERESTED IN

**67%**

Nature Walks

**63%**

Local Markets

**61%**

Oceanside Beaches

**58%**

Natural Attractions

**57%**

Nature Parks

**55%**

Historical, Archaeological or World Heritage Sites

**55%**

Hiking

**52%**

Learning about Indigenous Culture, Traditions or History

**51%**

Trying Local Food and Drink

**44%**

Guided City Tours

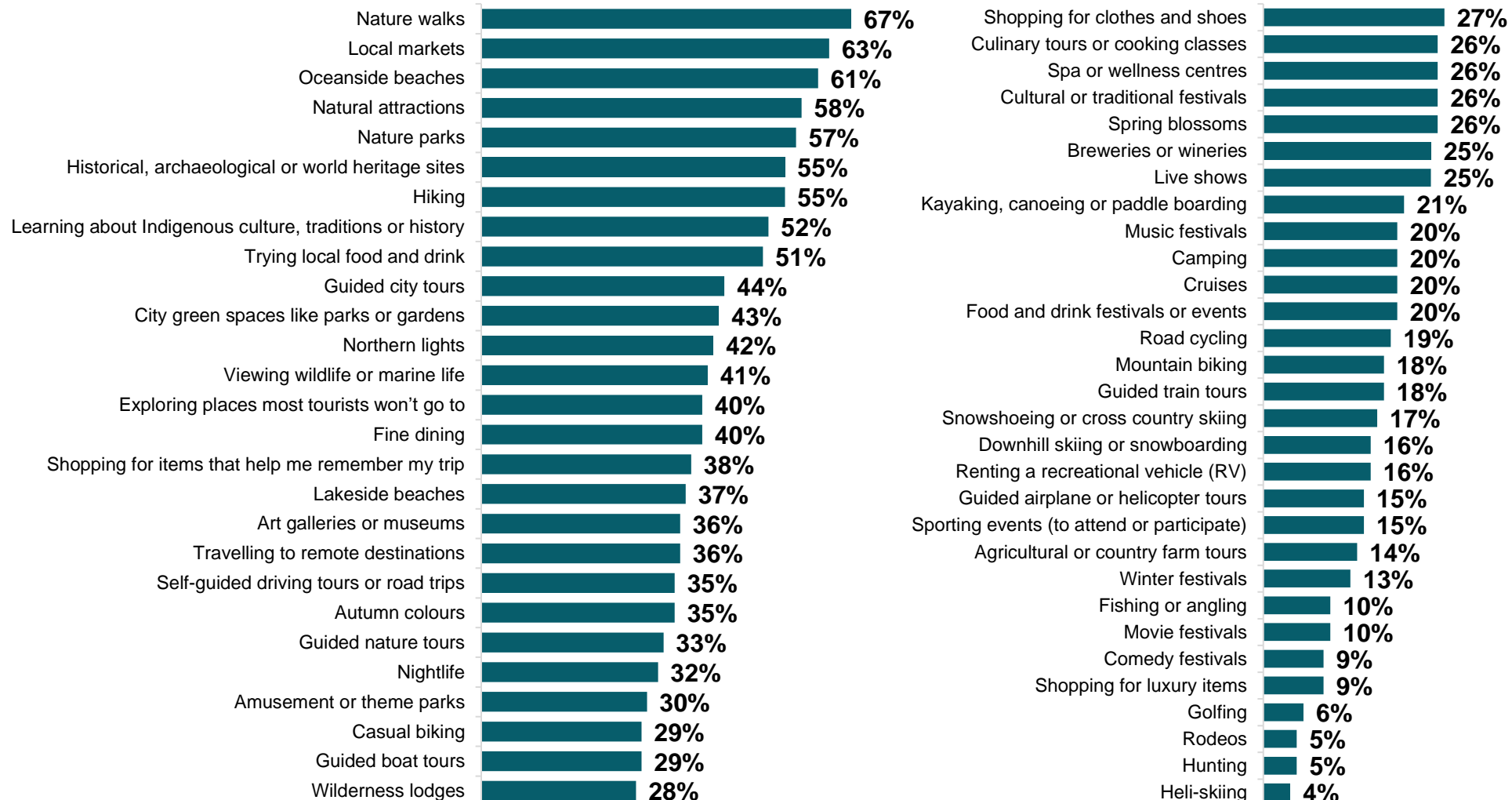


**French travellers are most interested in outdoor experiences like walks, beaches, natural attractions, and parks. They also show interest in local markets.**





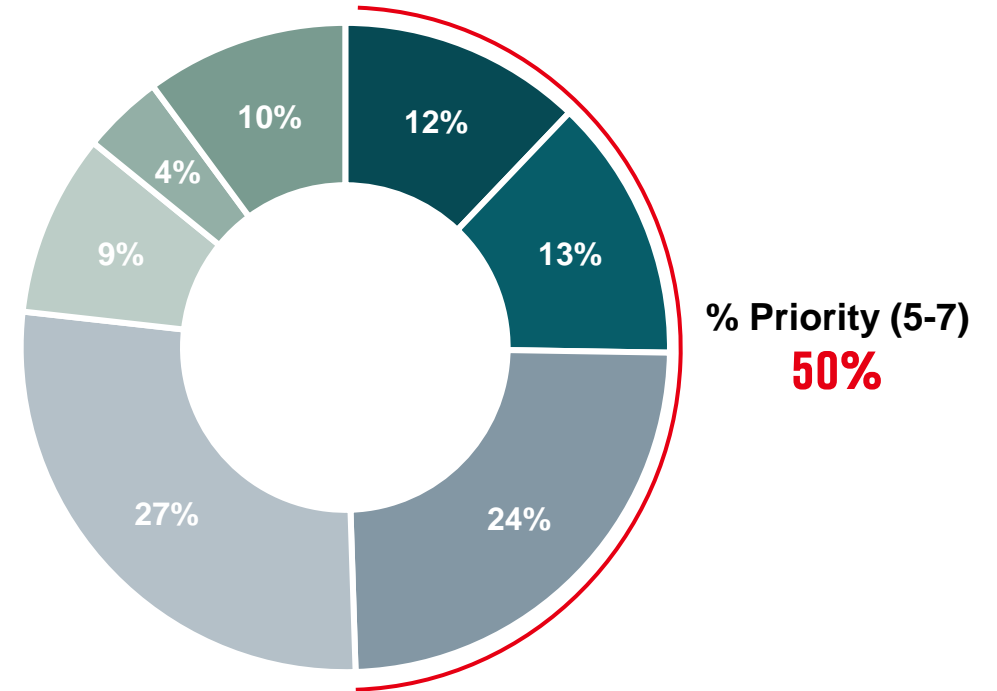
# GENERAL ACTIVITIES INTERESTED IN (FULL LIST)



Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1504)  
In general, what activities or places are you interested in while on holiday? (Select all that apply)



## PRIORITY OF SUSTAINABLE TRAVEL WHEN PLANNING A TRIP



■ 7 - Essential priority ■ 6 ■ 5 ■ 4 ■ 3 ■ 2 ■ 1 - Not a priority

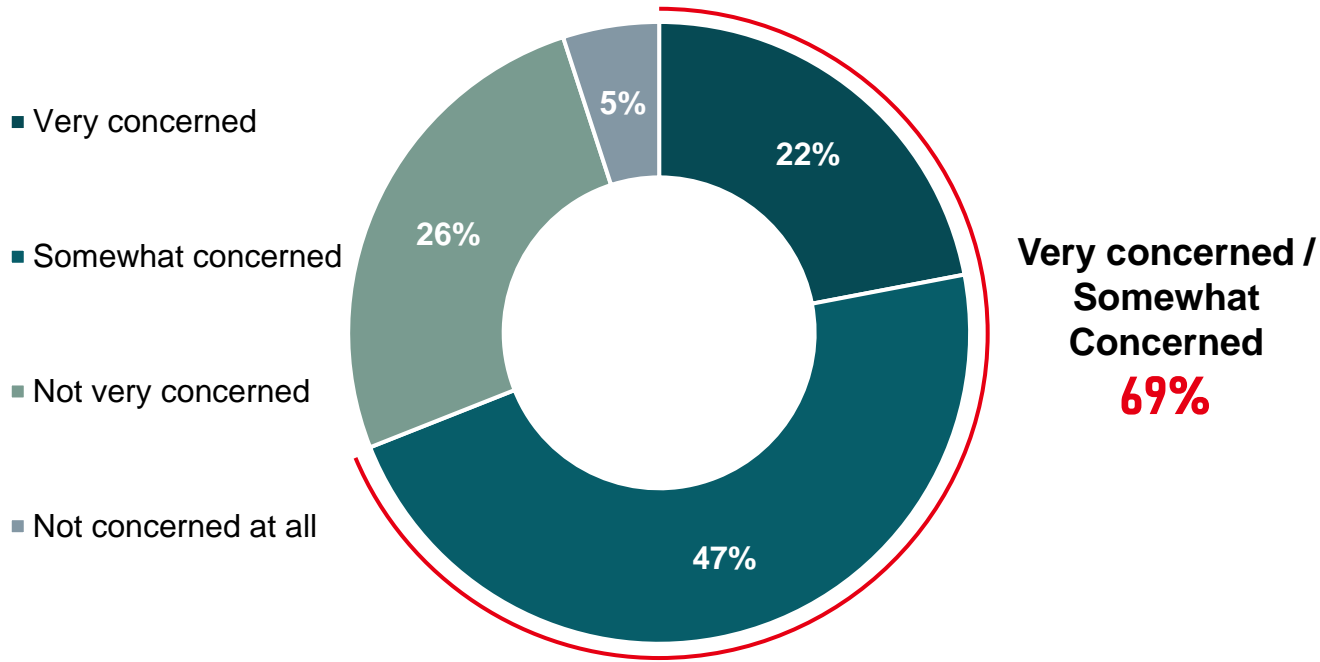
Half of French travellers consider sustainable travel to be a priority during trip planning.



Nahanni  
Northwest Territories

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1504)  
How much of a priority is sustainable travel to you when you are planning a trip? Please use a 7-point scale, where 7 means 'essential priority' and 1 means 'not a priority'.  
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".

# IMPACT OF EXTREME WEATHER EVENTS ON TRAVEL PLANS



**17%** Changed/Cancelled plans in the past 3 years due to extreme weather events

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=730)  
 How concerned are you about extreme weather events affecting your travel plans?  
 In the past 3 years, have you ever had to change plans or cancel a trip due to extreme weather events?  
 Extreme weather events description: 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.  
 \*Source: <https://www.npr.org/2023/08/22/1195154996/some-of-canadas-wildfires-likely-made-worse-by-human-driven-climate-change>



**Seven in ten French travellers are concerned about the impact of weather events on travel plans.**



# INDIGENOUS TOURISM ACTIVITIES



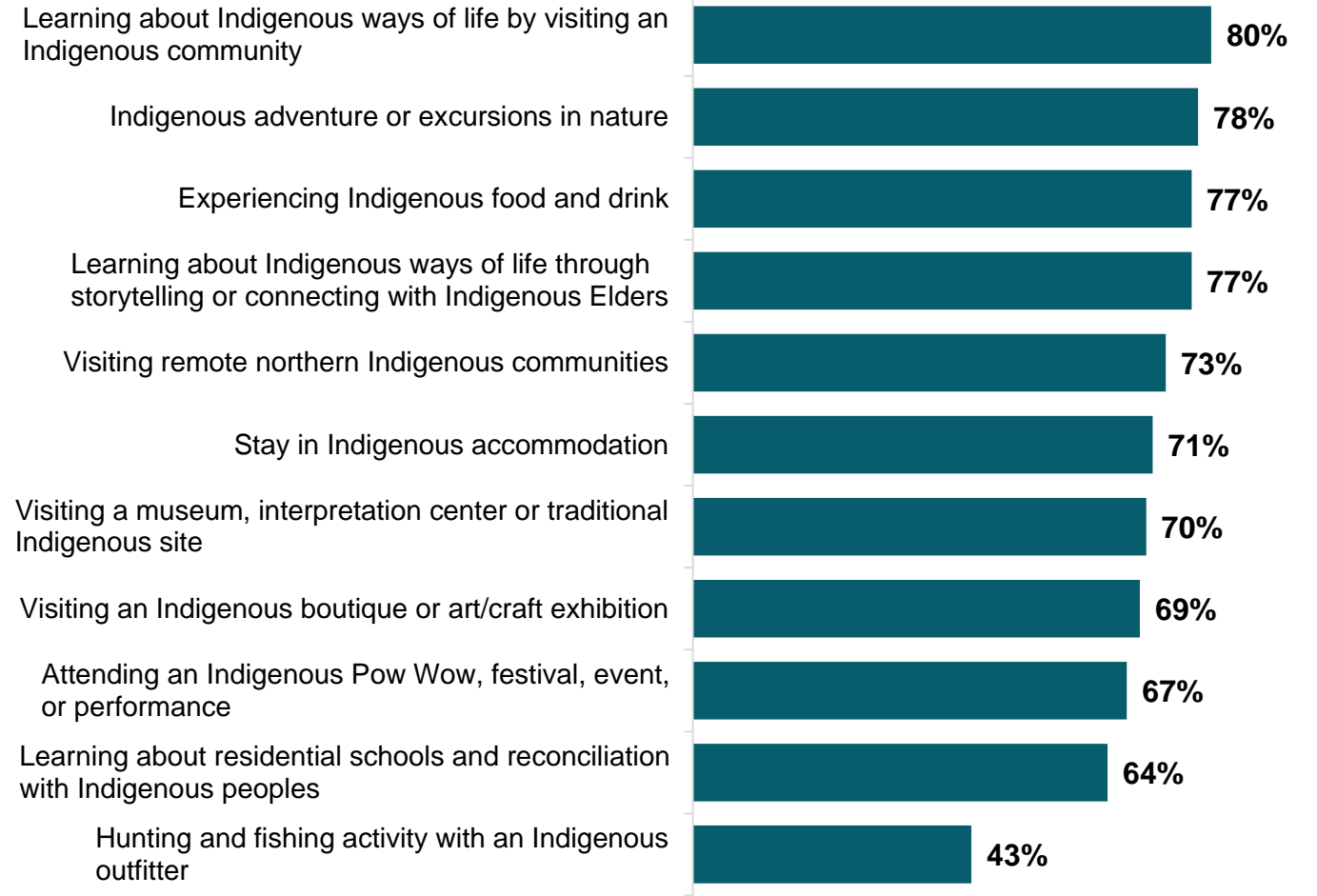
British Columbia



# INTEREST IN INDIGENOUS CULTURAL & TOURISM ACTIVITIES

Potential visitors to Canada are most interested in participating in Indigenous culture by visiting an Indigenous community, participating in excursions in nature, experiencing Indigenous food, and learning about Indigenous ways of life from Elders.

% Somewhat/Very Interested



Base: Those in the dream to purchase stages of the path to purchase for Canada (n=1113)  
 What is your level of interest in the following Indigenous cultural experiences and tourism activities in Canada? Indigenous Tourism Description: As you may or may not know, in Canada, Indigenous tourism businesses are majority-owned or operated by Indigenous peoples (First Nations, Métis or Inuit). The social and economic benefits of Indigenous tourism businesses goes back to the business owners and/or the communities where they are based.



Uclulet  
British Columbia

# TRIP TO CANADA IN THE PAST 3 YEARS



Jasper  
Alberta



# TOP 10 ACTIVITIES PARTICIPATED IN DURING PAST 3 YEAR TRIP TO CANADA

Nature and local experiences were the most popular activities among travellers to Canada in the past 3 years.

**51%**

Nature Walks

**39%**

City Green Spaces

**43%**

Nature Parks

**37%**

Trying Local Food and Drink

**41%**

Local Markets

**31%**

Nightlife

**39%**

Natural Attractions

**29%**

Guided City Tours

**39%**

Hiking

**29%**

Shopping for Clothes and Shoes

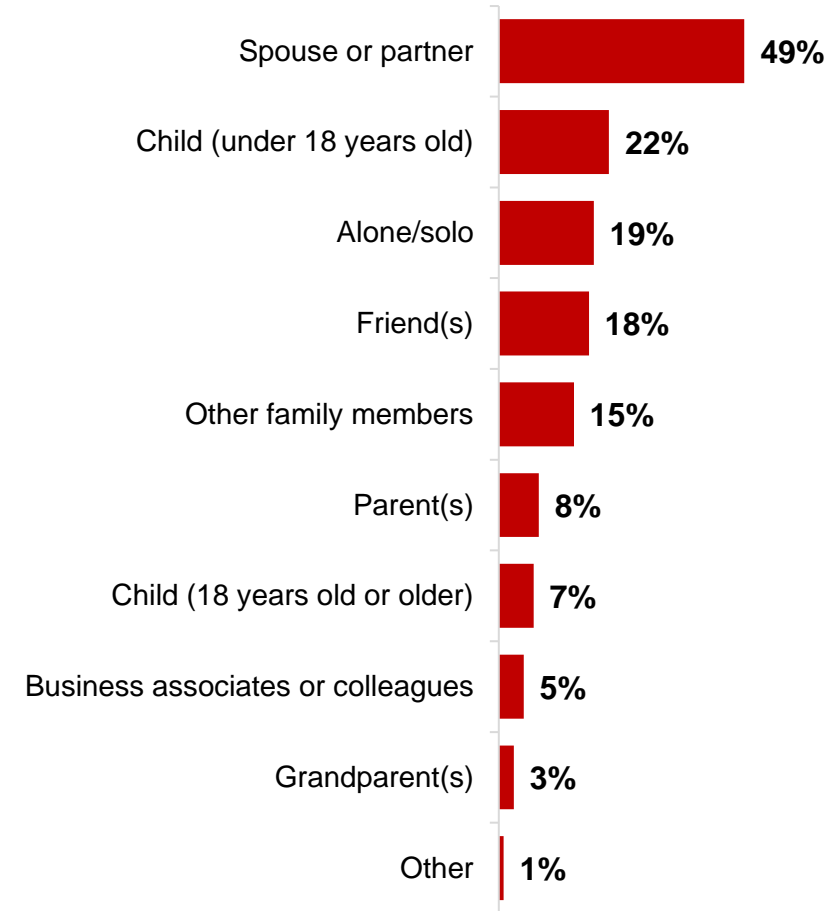
Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travellers to Canada (n=139)  
Which of the following activities, if any, did you participate in during your recent trip to Canada? (Select all that apply)



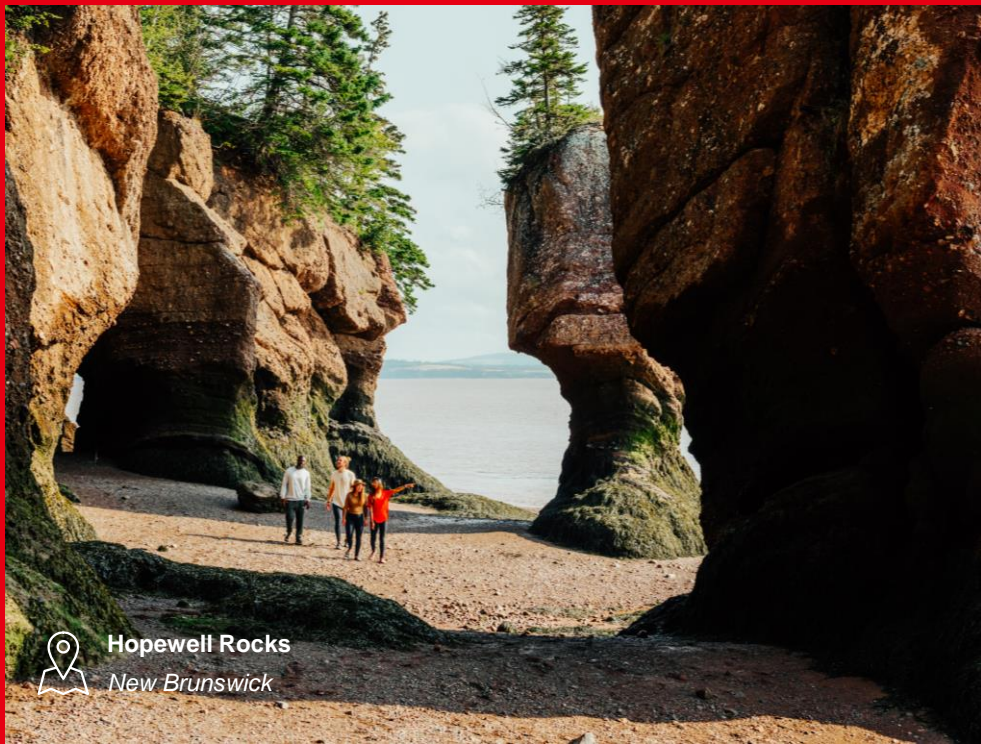
Johnston Canyon  
Alberta

# TRAVEL PARTY OF PAST 3 YEAR TRIP TO CANADA

Half of travellers to Canada in the past 3 years came with a significant other. The next most common travel companions were children under 18.



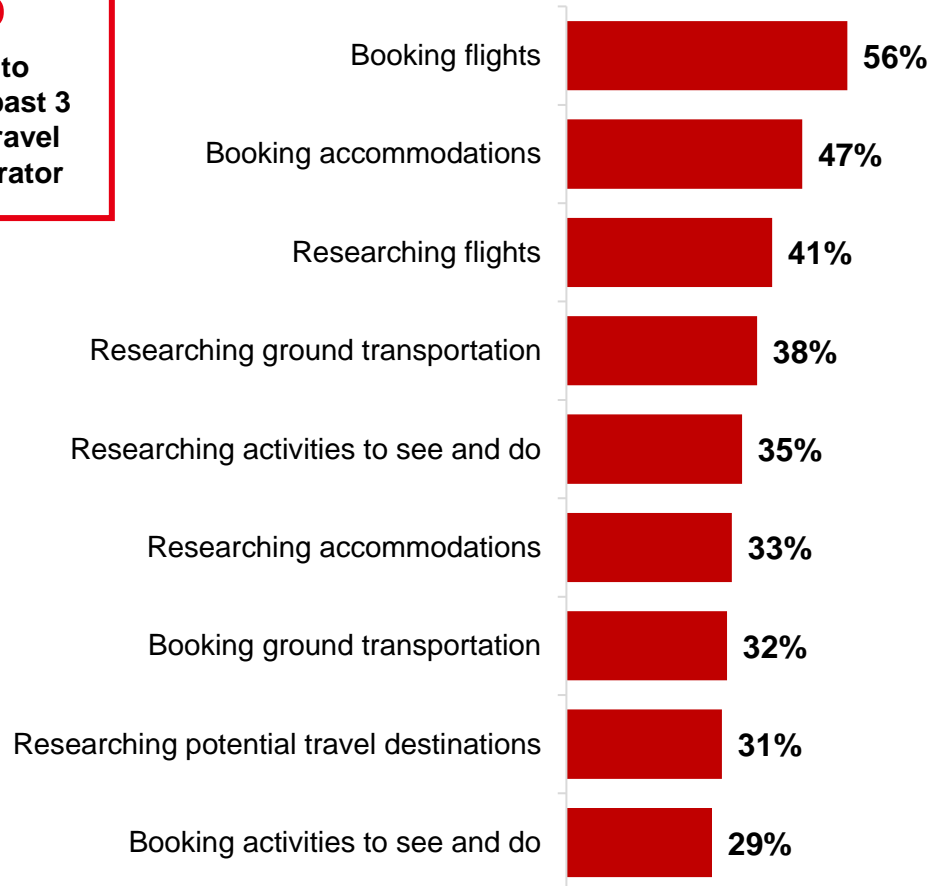
Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travellers to Canada (n=139)  
With whom did you travel on this trip? (Select all that apply)





# TRAVEL AGENTS/TOUR OPERATOR USAGE FOR PAST 3 YEAR TRIP TO CANADA

**44%**  
of travellers to Canada in the past 3 years used a travel agent/tour operator



**Over four in ten travellers to Canada in the past 3 years used a travel agent/tour operator to research or book their trip. They were most likely to use a travel agent/tour operator when booking flights and accommodations.**

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travellers to Canada, Used a Travel Agent/Tour Operator (n=61)  
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 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)  
Which of the following did a travel agent or tour operator help you with?

# ORGANIZED GROUP TOUR USAGE FOR PAST 3 YEAR TRIP TO CANADA

Around three in ten travellers to Canada in the past 3 years reported that their whole trip was part of an organized group tour.

Yes, my whole trip was part of an organized group tour

31%

Yes, a portion of my trip was part of an organized group tour

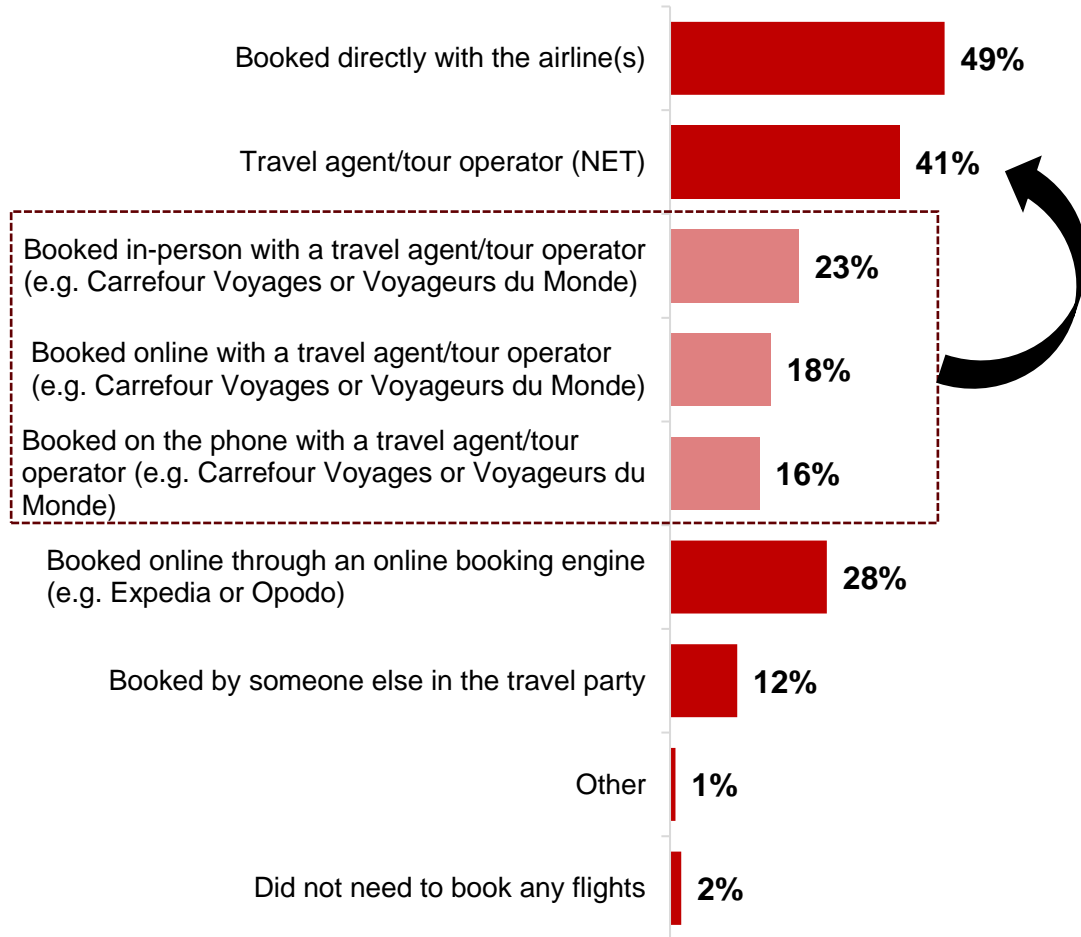
12%

No

57%

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travellers to Canada (n=139)  
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?

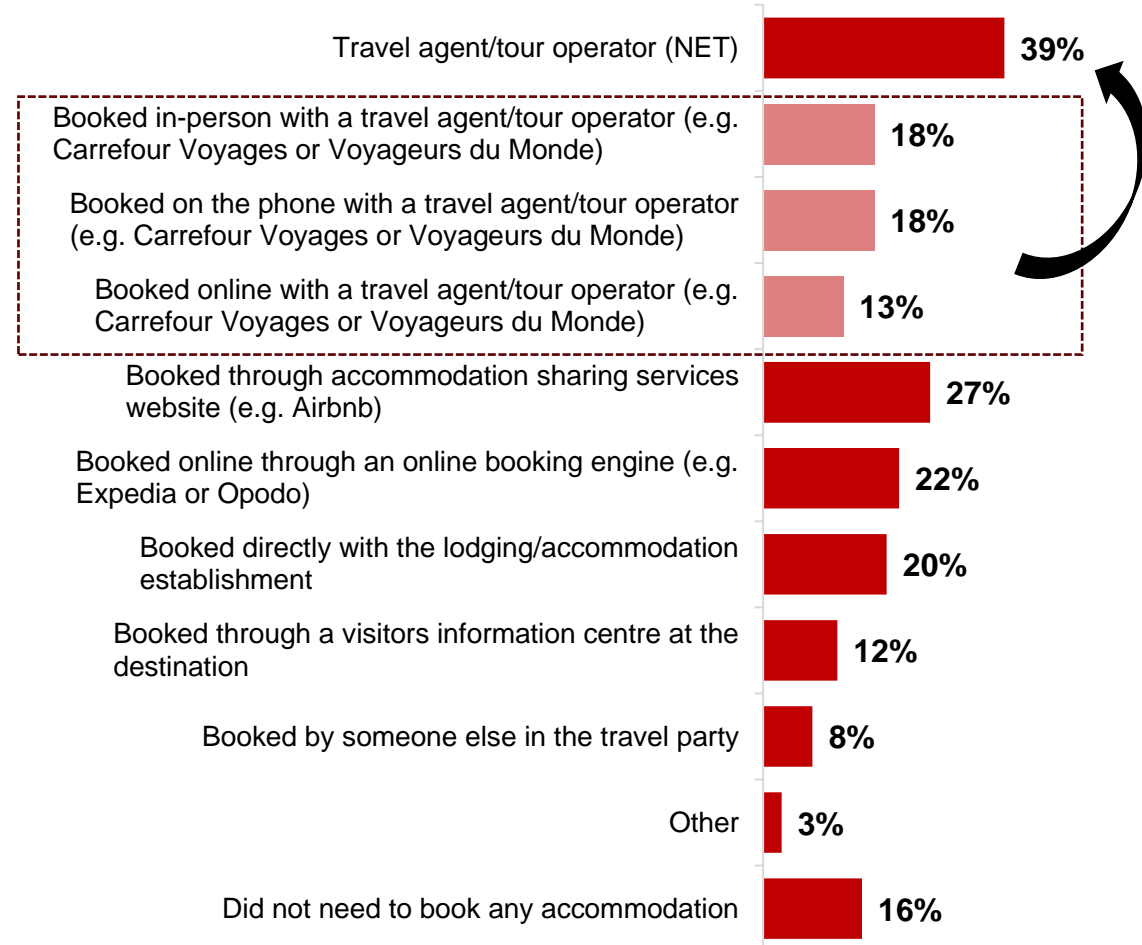
# BOOKING FLIGHTS FOR PAST 3 YEAR TRIP TO CANADA



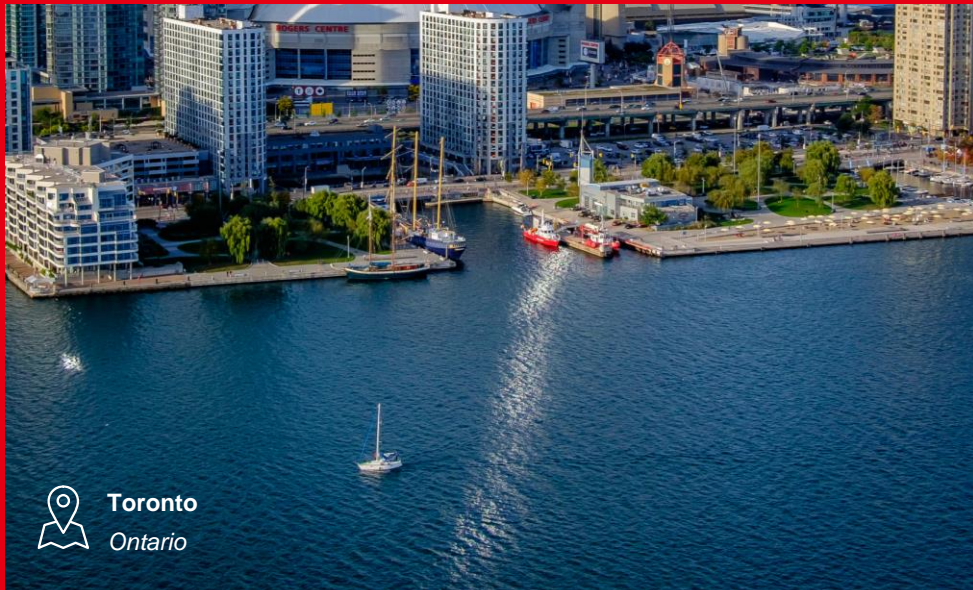
**Nearly half of travellers to Canada in the past 3 years booked flights directly through the airline. Booking in person was the most likely way travellers interacted with a travel agent/tour operator.**

# BOOKING ACCOMMODATIONS FOR PAST 3 YEAR TRIP TO CANADA

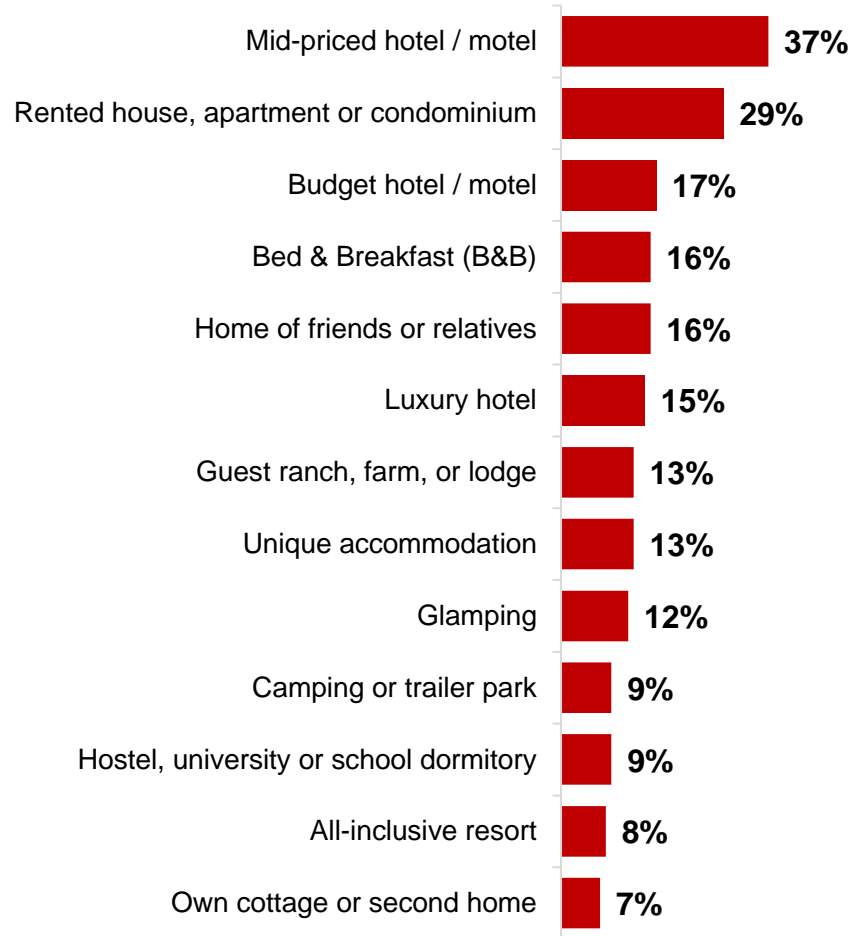
Almost four in ten travellers to Canada in the past 3 years booked accommodations with a travel agent/tour operator. This is followed by bookings through accommodation sharing services sites and online booking engines.



Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travellers to Canada (n=139)  
How did you book your accommodation for this trip? (Select all that apply)



# TYPES OF ACCOMMODATION DURING PAST 3 YEAR TRIP TO CANADA



29 Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travellers to Canada (n=115)  
Which type of accommodation did you stay in during this trip? (Select all that apply)



**Travellers to Canada in the past 3 years were most likely to stay in either a mid-priced hotel or rented accommodation.**

# THANK YOU

For any questions, please reach out to [research@destinationcanada.com](mailto:research@destinationcanada.com)



CANADIAN TOURISM DATA  
**collective**