



INTERNATIONAL MARKET FOCUS

FRANCE

Fall 2023

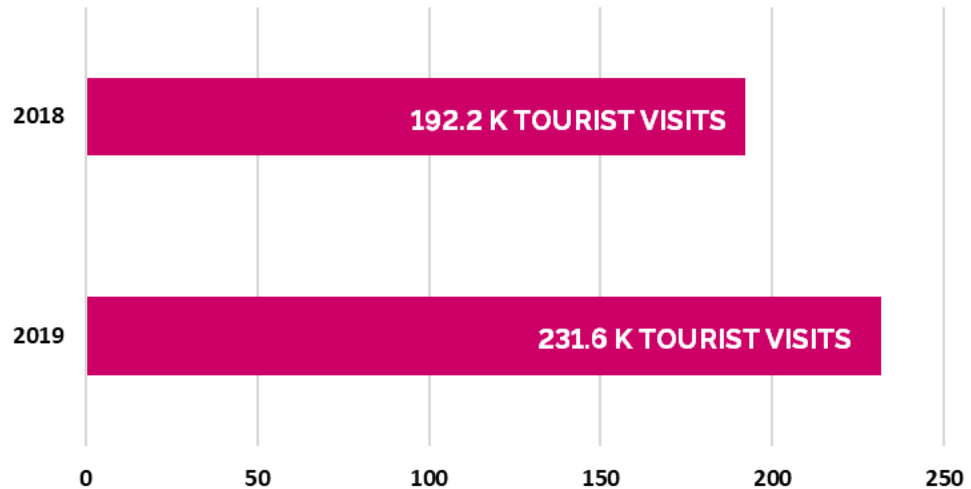
DESTINATION
ONTARIO



MARKET SIZE

- There were **231,600 tourist visits from France to Ontario** in 2019 (+21% over 2018). Nearly two-thirds (65%) of tourist visits from France to Ontario in 2019 also included a tourist visit to Québec.
- Tourists from France stayed **8 nights** per overnight Ontario visit, on average, in 2019. France accounted for **6% of all overseas visits to Ontario** in 2019.

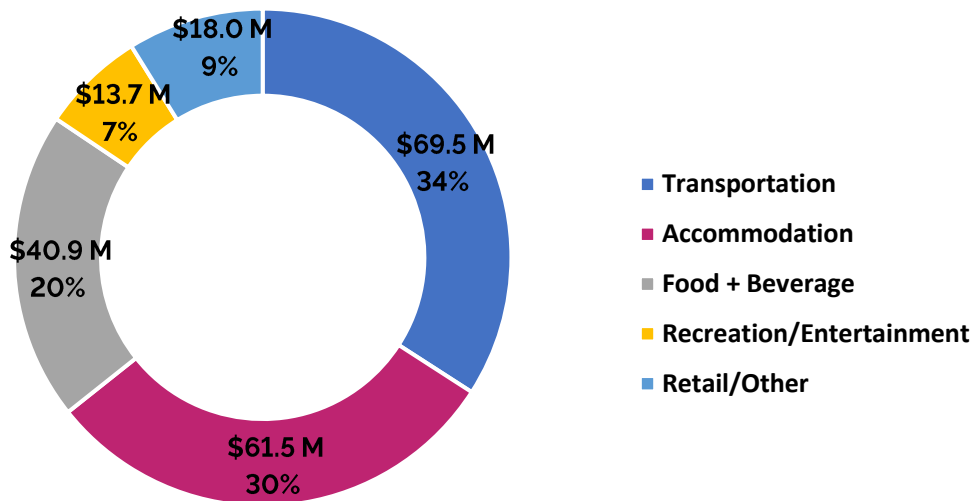
VISITS FROM FRANCE IN ONTARIO



VISITOR SPENDING

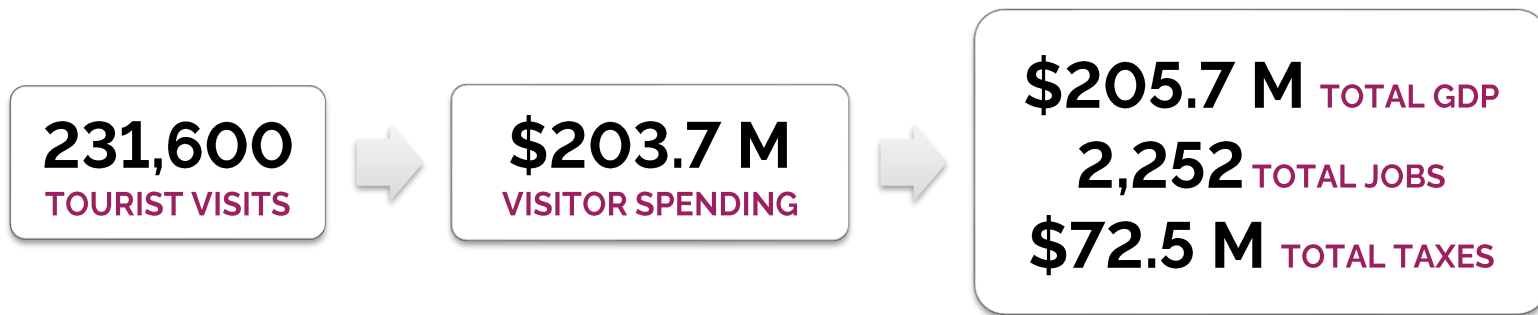
- Visitor spending in Ontario from France totalled **\$203.7 million** in 2019 (+2% from 2018).
- France accounted for **3% of overseas spending in Ontario** in 2019.
- Tourists from France spent an average of **\$880 per visit in Ontario** in 2019 – **3.9 times more** than the average spend per visit in Ontario. Most visitor spending was on **transportation (34%)** and **accommodation (30%)**.
- Destination Canada has estimated that it may take until 2025 for tourism spending in Canada from France to recover to 2019 levels.

FRANCE SPENDING BY CATEGORY: 2019



THE VALUE OF THE FRANCE TRAVELLER

ECONOMIC IMPACT OF VISITOR SPENDING FROM FRANCE IN ONTARIO (2019)



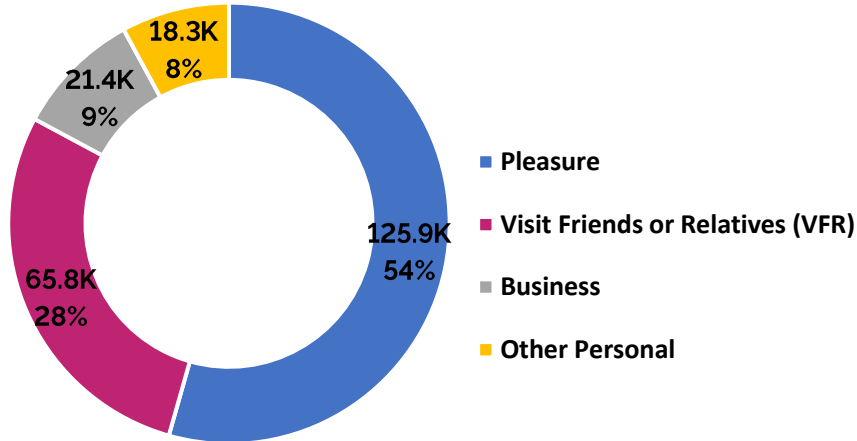
Source: Statistics Canada, Visitor Travel Survey (2019) and the Ontario Ministry of Tourism, Culture and Sport's Tourism Regional Economic Impact Model



TRIP CHARACTERISTICS

- **54%** of tourist visits from France to Ontario were taken for **pleasure** – the largest share among Ontario's overseas markets

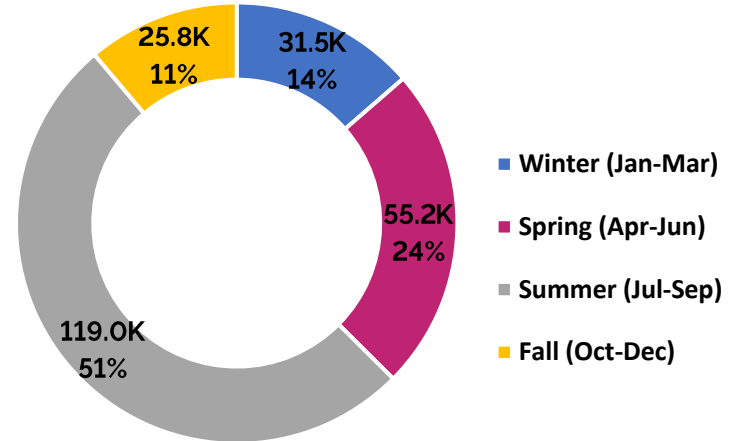
MAIN PURPOSE OF VISIT FROM FRANCE: 2019



Source: Statistics Canada, Visitor Travel Survey

- **51%** of tourist visits from France to Ontario occurred in the **summer**

FRANCE SEASON OF VISIT: 2019



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TRIP CHARACTERISTICS

TOP TRIP ACTIVITIES IN ONTARIO (2019)

TRIP ACTIVITY	% FRANCE VISITS IN ONTARIO
Restaurant, bar or club	84%
Sightseeing	73%
Shopping	69%
Historic site	56%
National or provincial nature park	49%

TOP TOURISM REGIONS VISITED (2019)

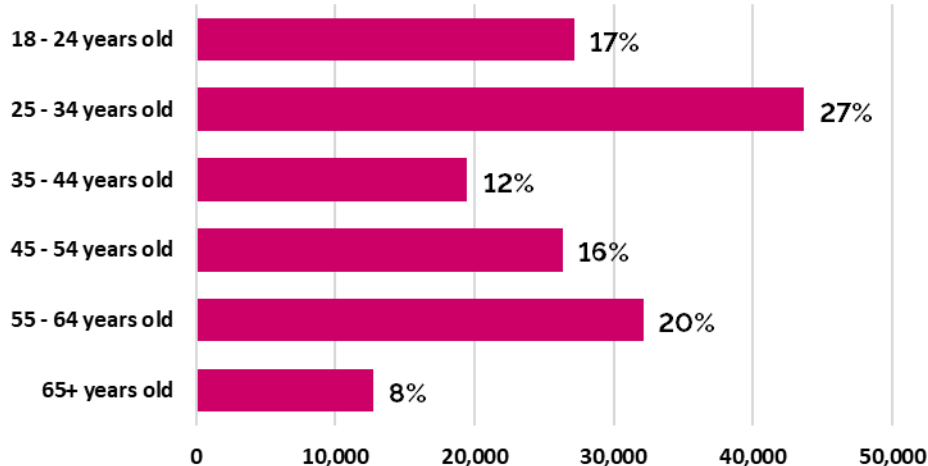
TOURISM REGION	% FRANCE VISITS IN ONTARIO
Region 5: Greater Toronto Area	70%
Region 10: Ottawa and Countryside	39%
Region 2: Niagara Canada	34%
Region 9: Southeastern Ontario	9%
Region 7: Bruce, Grey, Simcoe	3%

- Visits from France to Ontario and Québec saw higher shares of visits to Ottawa (52%) and Southeastern Ontario (12%).

DEMOGRAPHICS

- The largest share of tourist visits from France to Ontario was from those aged 25-34 years old in 2019 (27%). **The average age of a tourist from France to Ontario was 42.**
- 13% of travel parties from France to Ontario had children travelling with them in 2019.
- Of those who stated their gender, slightly more than half (52%) of visits from France to Ontario were taken by women in 2019.

FRANCE VISITS TO ONTARIO BY AGE STATED (18+): 2019



POTENTIAL MARKET SIZE FOR CANADA



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



Target Market for Canada



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

Size of the target
market



Immediate Potential
for Canada



Will definitely/very likely visit
Canada in the next 2 years¹

Immediate potential



Source: Destination Canada 2022 Global Markets Traveller Incidence & Market Sizing Update

[^] Long-haul = outside of Europe, North Africa and the Mediterranean | ¹ Includes respondents likely to visit Canada for a trip of 1 to 3 nights, or a trip of 4 nights or more.





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