



MAJOR TOURISM SECTORS

**Cultural and
heritage tourism**

Visits to museums, tourist attractions, festivals

Nature tourism

Outdoor, adventure and ecotourism

Food tourism

Distinctive culinary experiences, agrotourism,
food discovery

Sports tourism

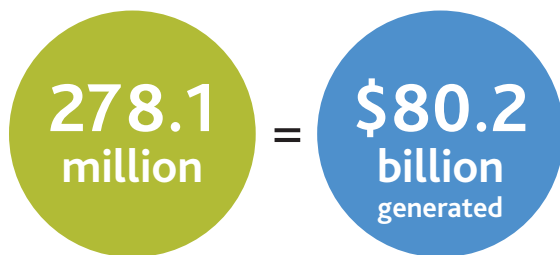
Sporting events and athletic competitions

Business tourism

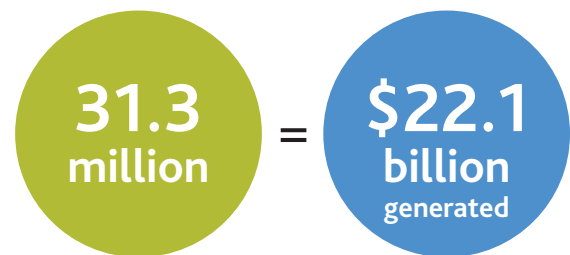
Conventions, symposia, incentive travel

NUMBER OF TRIPS

TRIPS BY CANADIANS WITHIN CANADA



INTERNATIONAL TRAVELLERS VISITING CANADA (2018)



MAIN MARKETS TARGETED BY DESTINATION CANADA

United States | United Kingdom | France | China | Germany | Mexico
Australia | India | Japan | South Korea

MAIN GROUPS TARGETED BY DESTINATION CANADA

Cultural explorers	> Open-minded > Travel and discovery enthusiasts
Authentic experience travellers	> Reserved travellers > In search of authenticity and the concrete > Special interests in the history of the places they visit
Free spirits	> Sociable > Seekers of new experiences and adventures

ECONOMIC IMPACTS OF THIS SECTOR (2018)

\$98.8 billion in tourism revenue for Canada
\$80.2 billion Canadians spendings on domestic travels
2.1 % of the Canadian GDP
\$22.1 billion from foreign tourists
31.3 million foreign visitors
739,100 Canadian tourism businesses

Source: Statistics Canada. Table 24-10-0045-01 Travel of Canadian residents in Canada and abroad by purpose of travel (x 1,000).
 Statistics Canada. Table 24-10-0003-01 Non-resident travelers entering Canada by country of residence (excluding the United States).
 Statistics Canada. Table 24-10-0005-01 International travelers entering or returning to Canada by province of entry, seasonally adjusted.
 "Destination Canada, National Tourism Indicators - Highlights 2018. 2019." Destination Canada. Powering the Visitor Economy.
 2018 Annual Report. 2019 ". Association québécoise de l'industrie touristique. "Tourism in numbers", 2019

FRANCOPHONE TOURISM MARKETS

For Canada, Francophone tourism and the Francophone domestic and international tourism markets represent a growth market.

SIZE OF THE MAIN FRANCOPHONE DOMESTIC AND INTERNATIONAL MARKETS

 **307.2**
million
people 

LEADING INTERNATIONAL FRANCOPHONE MARKETS



FRANCE



BELGIUM



SWITZERLAND

NEARBY FRANCOPHONE MARKETS

Quebecers

Francophones in Canada (outside Quebec)

French-speaking Americans

WAYS TO ATTRACT THESE FRANCOPHONE TOURISTS

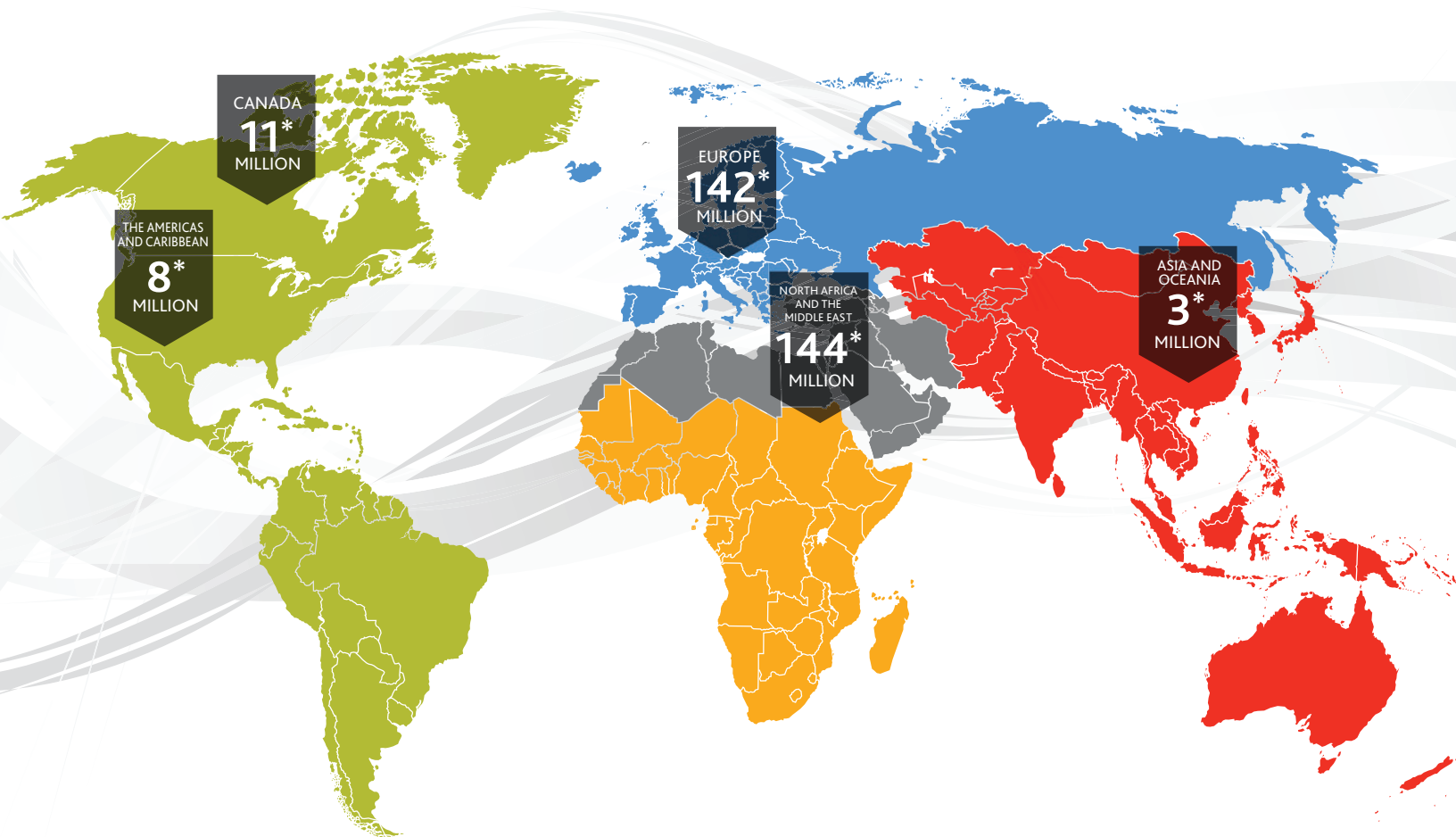
Provide information, products and services in French

Enhance French-Canadian culture and heritage

Promote the Francophone and Acadian communities

It is worth noting that Francophone tourism products are not exclusively for French-speaking tourists. They can be used as traffic builders or complementary products to attract other international groups targeted by Destination Canada.

PRIMARY FRANCOPHONE TOURISM MARKETS AROUND THE WORLD



**307.2 MILLION
FRANCOPHONES**

France	67 million inhabitants
Belgium	9 million Francophones
Switzerland	6 million Francophones
Africa	106 million Francophones
Canada	11 million Francophones
United States	2 million Francophones
Primary states of residence: California - Louisiana - New York Florida - Massachusetts - Texas	

Source: Organisation Internationale de la francophonie – Estimate (2018)

* Figures rounded to the nearest unit

BELGIUM

1

OVERVIEW

POPULATION (2018): **11,422,068**

Official Languages

DUTCH
57%

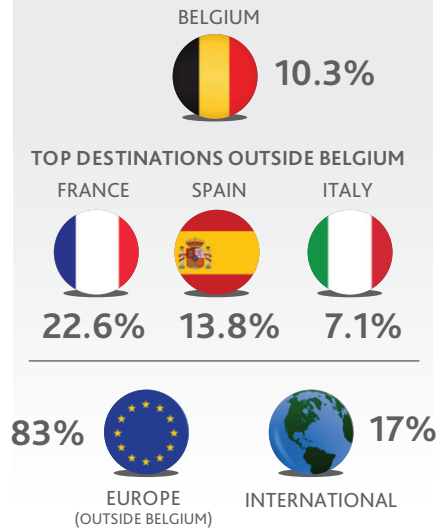
FRENCH
42%

GERMAN
1%

TRAVEL HABITS (2017)



PERSONAL TRAVEL DESTINATIONS (2017)



TOP DESTINATIONS OUTSIDE EUROPE (2017)

Long-haul destinations from Belgium

UNITED STATES

THAILAND

CANADA

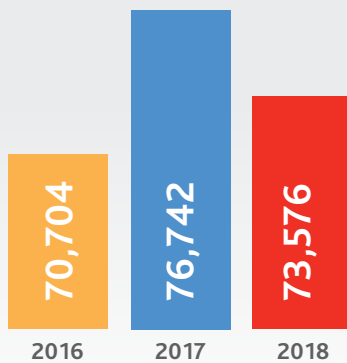
CHINA

CAPE VERDE

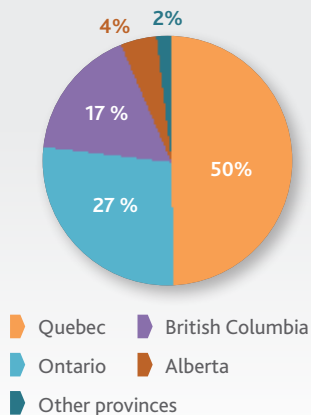
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BELGIAN TRAVELLERS AND CANADA

NUMBER OF BELGIAN TOURISTS IN CANADA



PROVINCE OF ENTRY (2018)



ECONOMIC IMPACT IN CANADA (2017)

\$150 million

Average of
\$1,827
per person-trip

3 PROFILE OF BELGIAN TRAVELLERS

MAIN REASONS FOR TRAVEL (2017)



HOLIDAY AND
RELAXATION

76%



VISITING FRIENDS
OR FAMILY

15%



PROFESSIONAL AND
OTHER REASONS

9%

AVERAGE LENGTH OF
STAY IN CANADA

17.2 days

HOW TO REACH THEM?

Resources used to plan a trip

PARENTS AND FRIENDS
(WORD OF MOUTH)

44%

TRAVEL GUIDES

35%

OFFICIAL WEBSITES OF
TOURIST OFFICES

43%

TOURISM TRADE SHOW



Salon Vacances
Bruxelles
un monde de voyages



Vakanz

MAIN AREAS OF INTEREST (2017)

Rest in nature

22%

Take a car trip

21%

Get away from the seaside to discover
more about a destination

20%

Participate in cultural
activities

16%

LOCAL TOUR OPERATORS OFFERING TRAVEL PACKAGES IN CANADA



Source: The World Bank. Data - Belgium. 2019. «Brussel.info. Languages spoken in Brussels. 2019 ». European Commission. Eurostat. Tourism. Annual travel data of EU residents. Number of stays. Number of trips (tour_dem_tttot). European Commission. Eurostat. Tourism. Publications. European tourist trips. Chapter 1: Introduction and Key Figures (2017). 2019. European Commission. Eurostat. Tourism. Annual travel data of EU residents. Number of nights spent by country / region of the world (tin 00193). European Commission. Eurostat. Tourism. Annual travel data of EU residents. Number of trips by reason (tour_dem_ttpur). Tourisme Québec, Market, Belgium. 2019. Statistics Canada. Table 24-10-0003-01 Non-resident travelers entering Canada by country of residence (excluding the United States). "Destination Canada, US and Overseas Travelers to Canada (Inbound) Period: Quarter 3 (July - September) 2018 - Quarter 4 (October - December) 2018. Expenditures by Country of Residence and Type of Expenditure. Survey Statistics Canada SAE model. "Statistics Canada Table 36-10-0594-01 Input-Output Multipliers, Retail Level

1

OVERVIEW

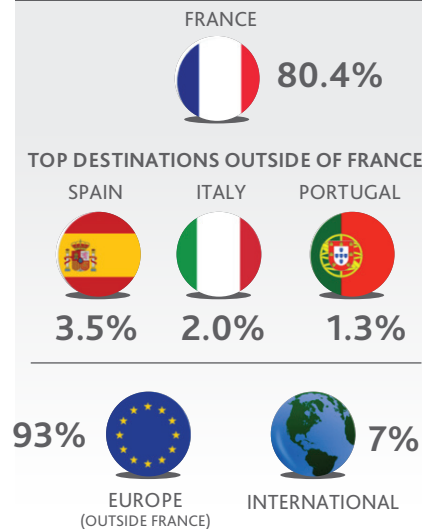
POPULATION (2018): **66,987,244**

Note: Among countries with French-speaking populations, France is the third-largest foreign market for Canada (after the United States and the United Kingdom), 2018.

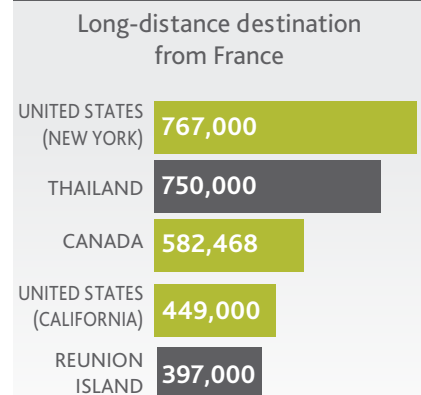
TRAVEL HABITS (2017)



PERSONAL TRAVEL DESTINATIONS (2017)



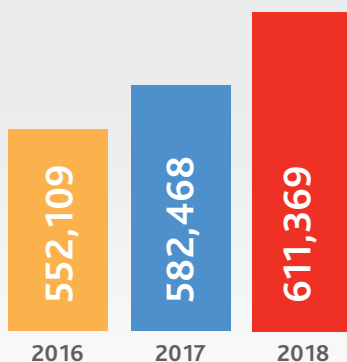
TOP 5 DESTINATIONS OUTSIDE OF EUROPE (2017)



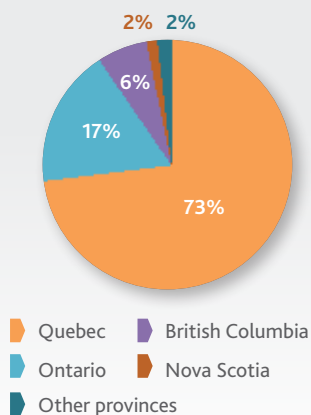
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FRENCH TRAVELLERS AND CANADA

NUMBER OF FRENCH TOURISTS IN CANADA



PROVINCE OF ENTRY (2018)



ECONOMIC IMPACT IN CANADA (2017)

\$1,028 million

Average of
\$1,450
per person-trip

3 PROFILE OF FRENCH TRAVELLERS

MAIN REASONS FOR TRAVEL (2017)



AVERAGE LENGTH OF STAY IN CANADA

16 days

Note: Knowing someone who lives in Canada is an important motivational factor

HOW TO REACH THEM?

Resources used to plan a trip

Accommodation establishment
Airline company
Travel agency or online booking



Hosting sharing
Services Website
Accommodation establishment

Travel agency
Travel agency or online booking service

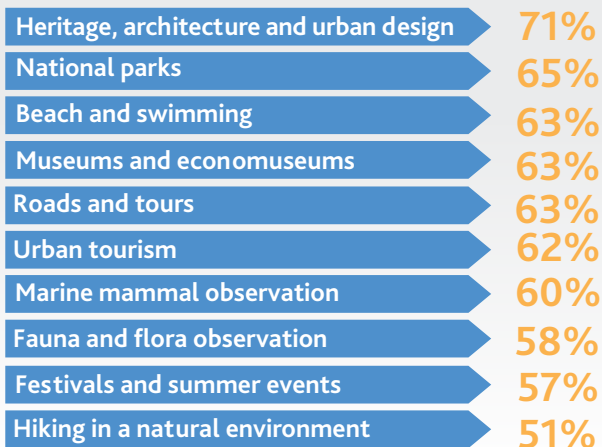


TOURISM TRADE SHOW

33

Tourism trade shows took place in France between 2016 and 2018

MAIN AREAS OF INTEREST (2017)



LOCAL TOUR OPERATORS OFFERING TRAVEL PACKAGES IN CANADA

KUONI

Grand Nord
Grand Large
LE VOYAGE POLAIRE

COMPTOIR
DES VOYAGES

ALLIBERT
trekking

le CERCLE des VACANCES

TERRE
Canada

e evaneos
Le voyage sur mesure en direct

TUI

Source : La Banque Mondiale. Données - France. 2019. Statistique Canada. Tableau 24-10-0003-01 Voyageurs non résidents entrant au Canada selon le pays de résidence (sauf les États-Unis). Statistique Canada. Tableau 24-10-0005-01 Voyageurs internationaux entrant ou revenant au Canada selon la province d'entrée, désaisonnalisées.. Organisation Internationale de la Francophonie. Estimation du nombre de francophones, Statistiques par pays. 2018. Commission européenne. Eurostat. Tourisme. Données annuelles sur les voyages des résidentes UE. Nombre de séjours. Nombre de voyages (tour_dem_ttott). Commission européenne. Eurostat. Tourisme. Publications. Voyages touristiques des Européens. Chapitre 1: Introduction et chiffres clés (2017). 2019. Commission européenne. Eurostat. Tourisme. Données annuelles sur les voyages des résidentes UE. Nombre de nuits passées par pays / région du monde (tin 00193). Commission européenne. Eurostat. Tourisme. Données annuelles sur les voyages des résidentes UE. Nombre de voyages par motif (tour_dem_ttpur). Tourisme Québec, Marché, France. 2019. Nsalons. Salons du Tourisme en France. 2019. "Destination Canada. US and Overseas Travellers to Canada (Inbound). Period: Quarter 3 (July - September) 2018 - Quarter 4 (October - December) 2018. Expenditures by Country of Residence and Type of Expenditure. Small Area Estimation for Visitor Travel Survey. Statistics Canada SAE model". Statistique Canada. Tableau 36-10-0594-01 Multiplicateurs d'entrées-sorties, niveau détail.

SWITZERLAND

1

OVERVIEW

POPULATION (2018): **8,516,453**

Languages (2014)

GERMAN

63%

FRENCH

22.7%

ITALIAN

8.1%

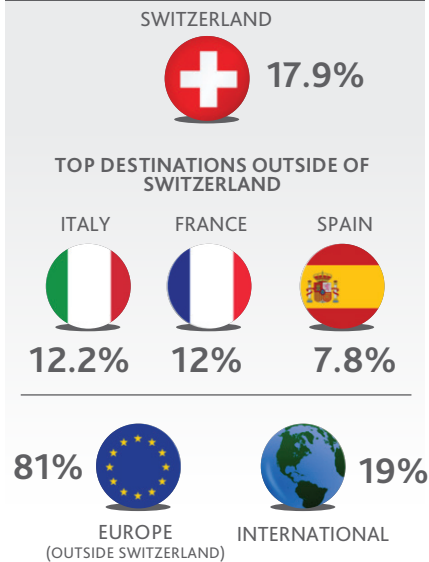
ROMANCHE

0.5%

TRAVEL HABITS (2017)



PERSONAL TRAVEL DESTINATIONS (2017)



TOP DESTINATIONS OUTSIDE OF EUROPE (2017)

Long-distance destinations from Switzerland

UNITED STATES

THAILAND

CANADA

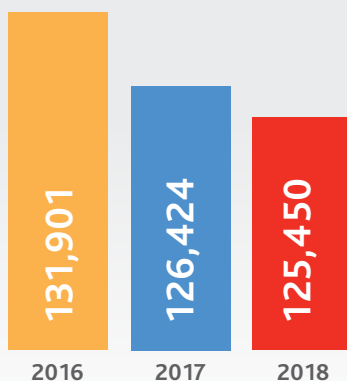
UNITED ARAB EMIRATES

KENYA

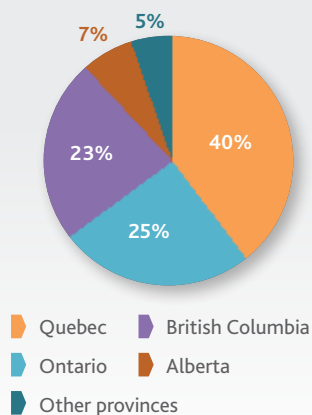
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SWISS TRAVELLERS AND CANADA

NUMBER OF SWISS TOURISTS IN CANADA



PROVINCES OF ENTRY (2018)



ECONOMIC IMPACT IN CANADA (2017)

\$278 million

Average of
\$1,942
per person-trip

3 PROFILE OF SWISS TRAVELLERS

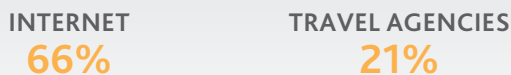
MAIN REASONS FOR TRAVEL (2017)



AVERAGE LENGTH OF
STAY IN CANADA
22.5 days

HOW TO REACH THEM?

Ressources used to plan a trip



INTERNET AND TRAVEL
AGENCIES
17%

TOURISM TRADE SHOWS

9

Tourism trade shows took place in
Switzerland between 2016 and 2018

MAIN AREAS OF INTEREST (2017)



LOCAL TOUR OPERATORS OFFERING TRAVEL PACKAGES IN CANADA

knechtreisen



Beatrix Travel AG
die neue Art zu reisen



KUONI

NAYAKREISEN
individuell • weltweit

Source: La Banque Mondiale. Données - Suisse. 2019. «Confédération suisse. Découvrir la Suisse. Les langues – faits et chiffres. 2017. Commission européenne. Eurostat. Tourisme. Données annuelles sur les voyages des résidentes UE. Nombre de séjours. Nombre de voyages (tour_dem_ttott). Commission européenne. Eurostat. Tourisme. Publications. Voyages touristiques des Européens. Chapitre 1: Introduction et chiffres clés (2017). 2019. Commission européenne. Eurostat. Tourisme. Données annuelles sur les voyages des résidentes UE. Nombre de nuits passées par pays / région du monde (tin 00193). Commission européenne. Eurostat. Tourisme. Données annuelles sur les voyages des résidentes UE. Nombre de voyages par motif (tour_dem_ttpur). Tourisme Québec, Marché, Suisse. 2019. Nsalons. Salons du Tourisme en Suisse. 2019. Statistique Canada. Tableau 24-10-0003-01 Voyageurs non résidents entrant au Canada selon le pays de résidence (sauf les États-Unis). "Destination Canada. US and Overseas Travellers to Canada (Inbound). Period: Quarter 3 (July - September) 2018 - Quarter 4 (October - December) 2018. Expenditures by Country of Residence and Type of Expenditure. Small Area Estimation for Visitor Travel Survey. Statistics Canada SAE model". Statistique Canada. Tableau 36-10-0594-01 Multiplicateurs d'entrées-sorties, niveau détail

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OVERVIEW

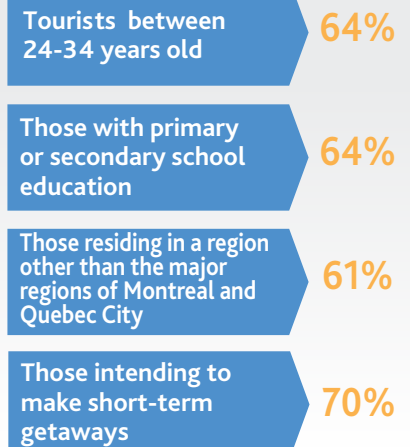
POPULATION

2018	8,390,499
2017	8,297,717
2016	8,225,950

TOTAL NUMBER OF TRIPS (MINIMUM ONE DAY OR OVERNIGHT) BY QUEBEC TRAVELLERS (2016)



MOST NUMEROUS SUBGROUPS TRAVELING TO CANADA (SUMMER PERIOD)

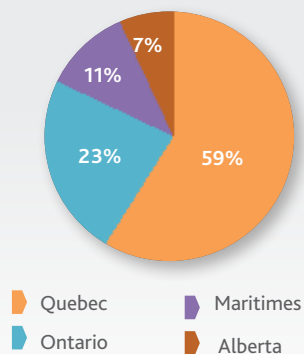


Source: Survey of Travel Behaviours
Quebec market (2016)

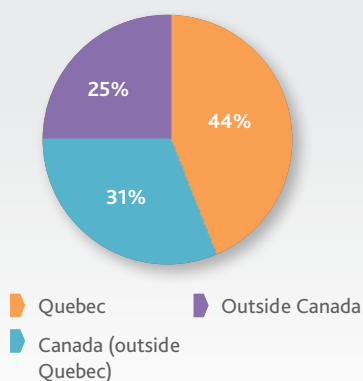
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QUEBEC TRAVELLERS AND CANADA

TOP DESTINATION PROVINCES (2013 - 2016)



QUEBEC TRAVEL DESTINATIONS (2013 - 2016)



ECONOMIC IMPACT IN CANADA (2016)

\$6.270 billion

Average of
\$392
per person-trip

3 PROFILE OF QUEBEC TRAVELLERS

MAIN REASONS FOR TRAVEL



INTRINSIC MOTIVATIONS

Change of scenery Temperature Visits with friends and family Shopping

HOW TO REACH THEM?

TOURISM TRADE SHOW



MAIN AREAS OF INTEREST

Shopping | City discovery | Gastronomy
 Museum and historical site visits | Natural parks
 Bars and night clubs | Casino | One-day cruises
 Festivals and fairs | Seaside relaxation
 Swimming | Visits with friends and family
 Urban centre visits | Pedestrian hiking (summer and winter)
 Fishing | Camping

LOCAL TOUR OPERATORS OFFERING TRAVEL PACKAGES IN CANADA



Source : Institut de la statistique du Québec. Le bilan démographique du Québec. Edition 2018. Ministère du Tourisme. « Le tourisme au Québec en bref, 2016 », 2018. Ministère du Tourisme. « Portrait de l'industrie touristique, 2016 », 2019. Ministère du Tourisme. « L'appréciation et l'attractivité de l'expérience touristique québécoise, Marché Québécois », 2019. Ministère du Tourisme, Chaire du Tourisme Transat, ESG, UQAM. « Étude Mesurant L'appréciation Et L'attractivité De L'expérience Touristique Québécoise, Marché Québécois », 2019. Ministère du Tourisme. Habitudes de voyage. Enquête sur les comportements de voyage – Marché du Québec, 2016. 2019. Ministère du Tourisme. « Le tourisme au Québec en bref, 2012 », 2014. Ministère du Tourisme. « Le tourisme au Québec en bref, 2013 », 2015. Ministère du Tourisme. « Le tourisme au Québec en bref, 2014 », 2016. Ministère du Tourisme. « Le tourisme au Québec en bref, 2015 », 2017. Québec Original. Événements, Salons et foires, Salon International Tourisme Voyages, 2019.

ECONOMIC ADVANTAGES AND BUSINESS OPPORTUNITIES OF FRANCOPHONE TOURISM

TOUR OPERATORS

- ▶ Innovate
- ▶ Diversify your target markets
- ▶ Attract new clients
- ▶ Increase your client volume
- ▶ Grow your business
- ▶ Satisfy a larger range of visitors
- ▶ Boost destinations' appeal by promoting their bilingual tourism products and services
- ▶ Work with new partners
- ▶ Invest in some of Canada's main tourism markets

FINANCIAL PARTNERS

- ▶ Invest in the world's 4th largest industry
- ▶ Support business development
- ▶ Invest in a high-growth economic sector
- ▶ Diversify your resources
- ▶ Participate in economic development and employability
- ▶ Strengthen communities
- ▶ Support innovative initiatives
- ▶ Capitalize on provincial and national economic objectives

COMMUNITIES

- ▶ Increase and diversify the local economy
- ▶ Create jobs and promote the retention of a skilled workforce
- ▶ Reduce the rural exodus
- ▶ Encourage community initiatives and vitality
- ▶ Enhance local cultural and heritage attractions
- ▶ Develop a sustainable vision
- ▶ Promote yourself as a bilingual destination
- ▶ Contribute to innovation and entrepreneurship



CONTACT OUR NETWORK'S FRANCOPHONE TOURISM SPECIALISTS

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com/francais

NEWFOUNDLAND AND LABRADOR

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For more information, visit our Website at:

www.rdee.ca/enjeux/tourisme