

CONFIDENTIAL

# MEXICO STRATEGIC REPORT 2023 GLOBAL TRAVELLER RESEARCH PROGRAM



CANADIAN TOURISM DATA  
**collective**



# Focus of This Report

- *Study Overview*
- *Key Insights*
- *Overall Travel Outlook & Trends*
- *Canada vs. Competitive Destinations*
- *Increasing Fall & Winter Visitation*
- *Sustainability*
- *Indigenous Tourism*



# Study Overview: Mexico Market

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.

HVG Audience Definition: Frequent travellers who are likely to travel long-haul in the next two years and either earn \$55,000 pesos+ household income per month or are retired.



## Timing of Fieldwork

December 11<sup>th</sup> – 24<sup>th</sup> 2023



## Geographical Definition for Qualified Trips

**Outside of: Mexico and  
Central America**



## Sample Distribution

Sample distribution: **Mexico City, Monterrey &  
Guadalajara**

High Value Guest (HVG) Audience: **376**

Other travellers: **1195**

Total sample size: **1571**



## **TOTAL MEXICO PERSPECTIVE**

Where applicable, insights are drawn from two of YouGov's proprietary syndicated data products, YouGov Global Travel Profiles and YouGov DestinationIndex to provide overall trends among the population of target regions (México D.F, Nuevo León & Jalisco), 18+

- In 2023, DC switched research providers to YouGov Canada, with the project being migrated over to YouGov's proprietary panel.
  - As a result, no trending is available for the Mexico market.





## Travel Outlook & Trends

- Incidence of **planned international holidays** has **increased** by 14% pts since 2021 Q1
- Among Mexican HVGs, **international holiday trips** are taken at a rate **comparable** to that of **domestic trips**; additionally, half of HVGs **add on vacation days to business trips** or choose to **work remotely** during a vacation
- Travel is **highest** in the **summer months**, when 7.4M typically travel. However, syndicated results indicate **an increase in vacations** being booked **outside of school holidays** (July & August)
- Overall incidence of using **direct airline booking, online book engines, and travel agents** for **flights** is similar, while **accommodations** are most often booked through **travel agents**
- When it comes to traveling to Canada, **the utilization of travel agents and tour operators** is more prevalent compared to other destinations, with half of recent travellers to Canada using a travel agent or tour operator to help them with their latest trip
- Travellers express a **high level of concern** as it relates to both **international conflict or unrest** and **weather-related impacts** on travel plans; in the past 3 years, one in four have had to change travel plans as a result



## Canada vs. Competitive Set

- **Canada** continues to be a **leading destination** among Mexicans
- On consideration and visitation metrics, Canada is generally behind the US but comparable to Spain
- The **next 2-year immediate potential for Canada is 7.4M**, including 2.2M HVGs
- **Past visitors** have had **good experiences** in Canada, garnering the **highest NPS score** in the competitive set. Syndicated data indicates that Mexicans have **an increasing preference for visiting the same destinations** for vacation, which bodes well for repeat visitation to Canada
- Currently, Canada is considered **a safe, environmentally friendly** country that **offers physically challenging activities** and the **opportunity to see wildlife**, along with being a place **where nature can be enjoyed in close proximity to cities** and **a good place to live**
- Conversely, **Canada under-indexes** on **providing good dining experiences, appealing festivals, great art and music scene, historical sights** and **cultural experiences**
- In comparison, **US strengths** are in **avoiding surprises** and **easy transportation** given high levels of familiarity and proximity





## Key Drivers & Opportunities

- The **top drivers** of consideration are: ***trending as a must-visit spot*** and ***being a place to visit with my family/friends***
- Of note, ***is a place where the people are welcoming*** and ***is a good place to live*** are the brand value statements with the **greatest influence** while most others fall towards the bottom of the list among total travellers; importance is somewhat lower among HVGs
- The **most influential drivers** of consideration are **currently not owned by any other** and can be **key opportunity areas for Canada to focus on**: ***trending as a must visit spot*** and ***being a place to visit with my family/friends***. These are **all areas Canada is performing below or near average** vs. competitors
- Among HVGs, ***trending as a must visit spot*** is currently a **weakness for Canada** and a dimension that is owned by France and Italy
- **Secondary drivers** that also represent white space opportunities include: ***offers good value for money, cities have great atmosphere, and being a place I would be proud to tell people I visited***



## Fall/Winter Travel

- There is an **opportunity for Canada to attract more visitors** in the Winter and Fall, with 6.2M and 5.0M typically travelling during these respective months
- Encouragingly, **interest in taking a trip during a destination's Fall season exceeds that of typical travel during Fall months**. Furthermore, **interest in taking a trip during a destination's Winter season is almost equal that of travel during Winter months**
- While the **US owns travellers' share of mind** when it comes to Fall/Winter destinations, **Canada ranks second**
- **3.3M travellers** are **considering** a visit to **Canada** in the **Fall** and **3.9M** in the **Winter** in the next two years
- Although some travellers find **Canadian weather to be a deterrent** when travelling, others are **motivated by the cold weather**; more than a quarter of travellers have places in Canada that they'd only want to go in the Fall/Winter months
- Leveraging **the Northern lights, natural attractions** and **city sightseeing** could **help increase consideration** in the Fall/Winter months as they are top experiences that travellers in Mexico are interested in while visiting Canada





## Sustainable Travel

- While **three quarters** of Mexican travellers claim that **sustainability is a priority** when planning a trip, **perceptions of *being environmentally friendly* and *socially responsible* are not strong drivers** of destination consideration
- That said, **six in ten** travellers and HVGs **associate Canada** with being a ***socially responsible* and *environmentally-friendly*** destination
- Top competitors **US and Spain** receive **significantly lower scores** on sustainability
- **Efforts that carry the greatest importance** are conservation of natural areas, that money spent is supporting the local community and that the destination's culture isn't negatively impacted by tourism
- However, more than half of Mexican travellers feel that there is a **lack of information on how to travel sustainably**
- To maintain this **competitive advantage**, Canada could **continue highlighting Canada's sustainability efforts** and **educating travellers** in messaging

## Indigenous Tourism

- Among Mexican travellers, **Canada is not considered a top destination** for Indigenous tourism; **Oaxaca and Peru** are the most mentioned destinations
- The **culture, food and historical buildings** are the top activities that come to mind when it comes to Indigenous tourism
- When thinking of Indigenous cultural experiences and tourism activities in Canada, **interest is high across a wide range of experiences**, including **food and drink, excursions in nature, visiting museums/traditional sites, boutiques or art/craft exhibitions, and learning about Indigenous ways of life**
- **Interest is lower** for **hunting/fishing** with an Indigenous outfitter



# Overall Travel Outlook & Trends

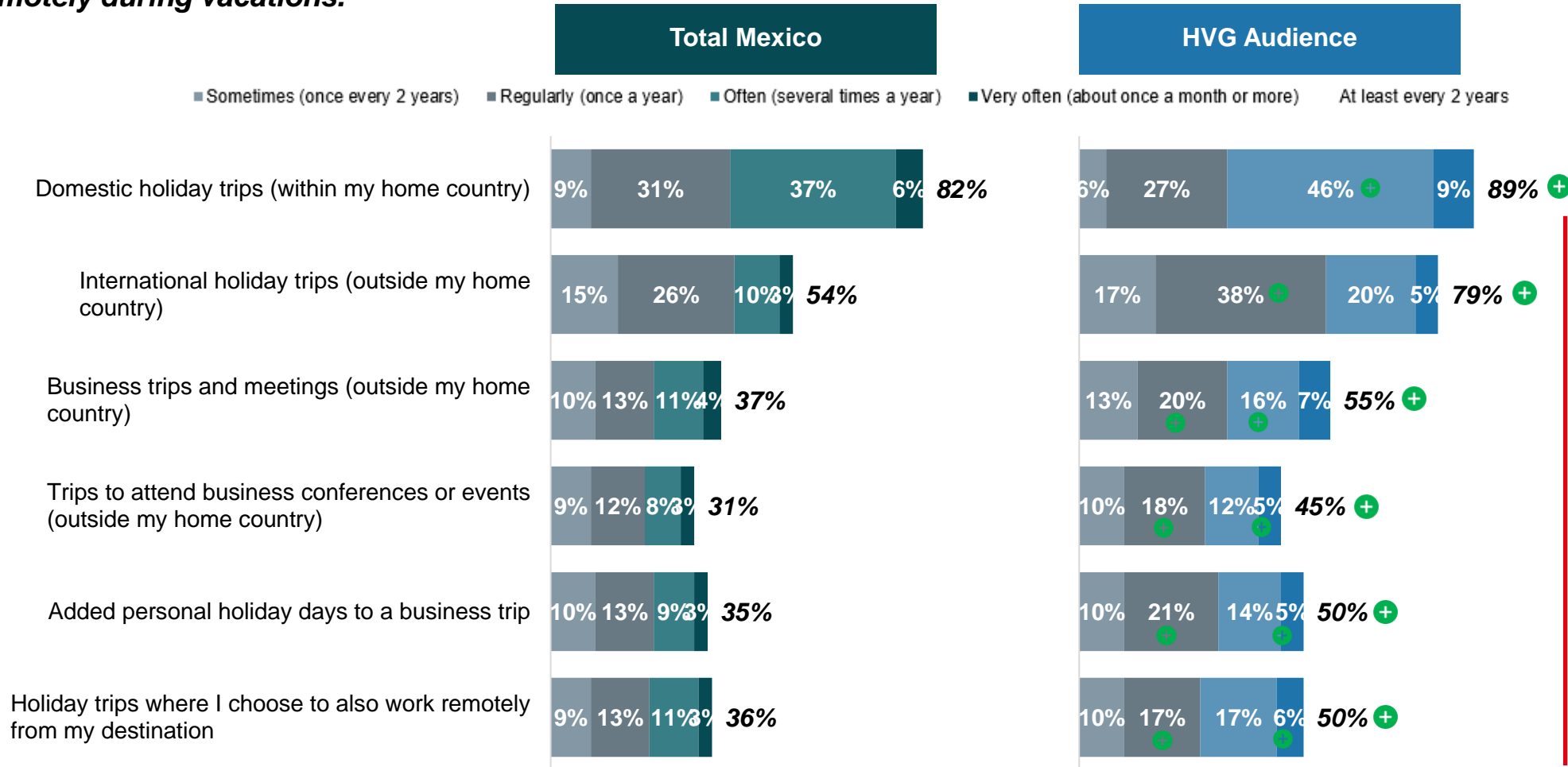


 Toronto  
Ontario



# Types of Travel Trips

Domestic holidays are taken more frequently than international holidays by total Mexican travellers. Among HVGs, international holidays are more comparable to domestic trips and half of HVGs add personal holidays to business trips and choose to work remotely during vacations.



**TOTAL MEXICO**  
 While domestic vacations are still the preferred trip type in Mexico, incidence of planned international vacations have been growing post-pandemic, increasing 14 percentage points, from 21% in 2021 Q1 to 35% in 2023 Q4. But Mexicans are planning for fewer trips than they were in 2022, potentially influenced by a trend towards more extensive trips to international destinations that demand a longer time commitment

YouGov Global Travel Profiles (Mexico) – 2023 Base: Target regions (México D.F., Nuevo León & Jalisco) 18+



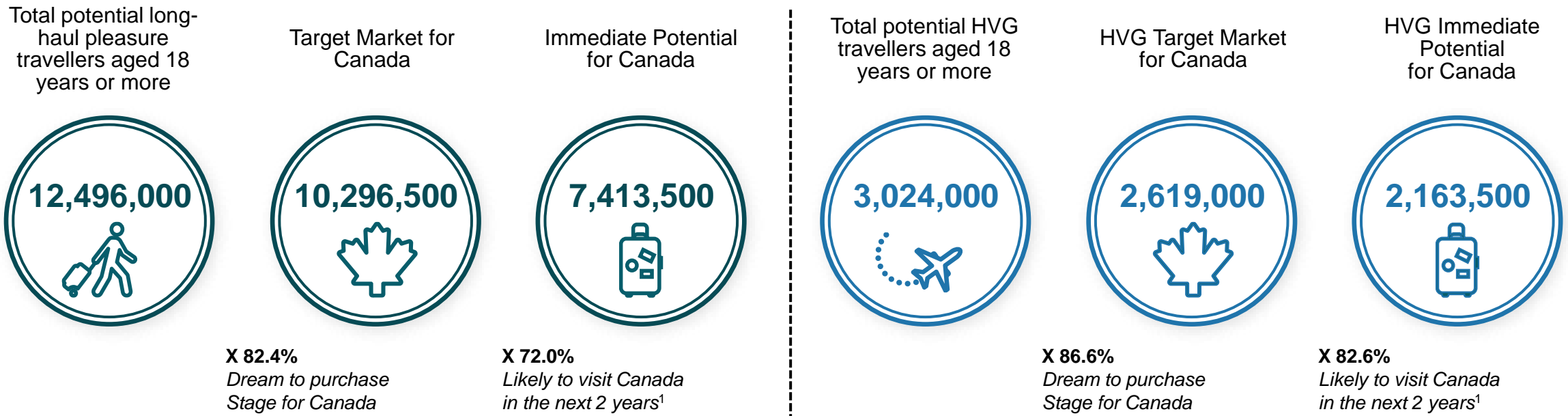
# Overall Demand for Long-Haul Pleasure Travel



$$\begin{array}{r}
 \text{Total Population 18+} \\
 \text{(among 3 target cities)} \\
 24,454,000
 \end{array}
 \times
 \begin{array}{r}
 \text{Long-Haul Traveller} \\
 \text{Incidence Rate} \\
 51.1\%
 \end{array}
 =
 \boxed{\begin{array}{r}
 \text{Size of Target Market} \\
 12,496,000
 \end{array}}
 \times
 \begin{array}{r}
 \text{HVG} \\
 24.2\%
 \end{array}
 =
 \boxed{\begin{array}{r}
 \text{Size of HVG Population} \\
 3,024,000
 \end{array}}$$



## Potential Market Size



Base: Target market for Canada = long-haul pleasure travellers (past 3 years or next 2 years) (n=1571); Immediate potential for Canada = dream to purchase stages for P2P for Canada (n=1311)

Base: Target market for Canada = long-haul pleasure travellers (past 3 years or next 2 years), HVG Audience (n=376); Immediate potential for Canada = dream to purchase stages for P2P for Canada (n=332)

<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.  
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)

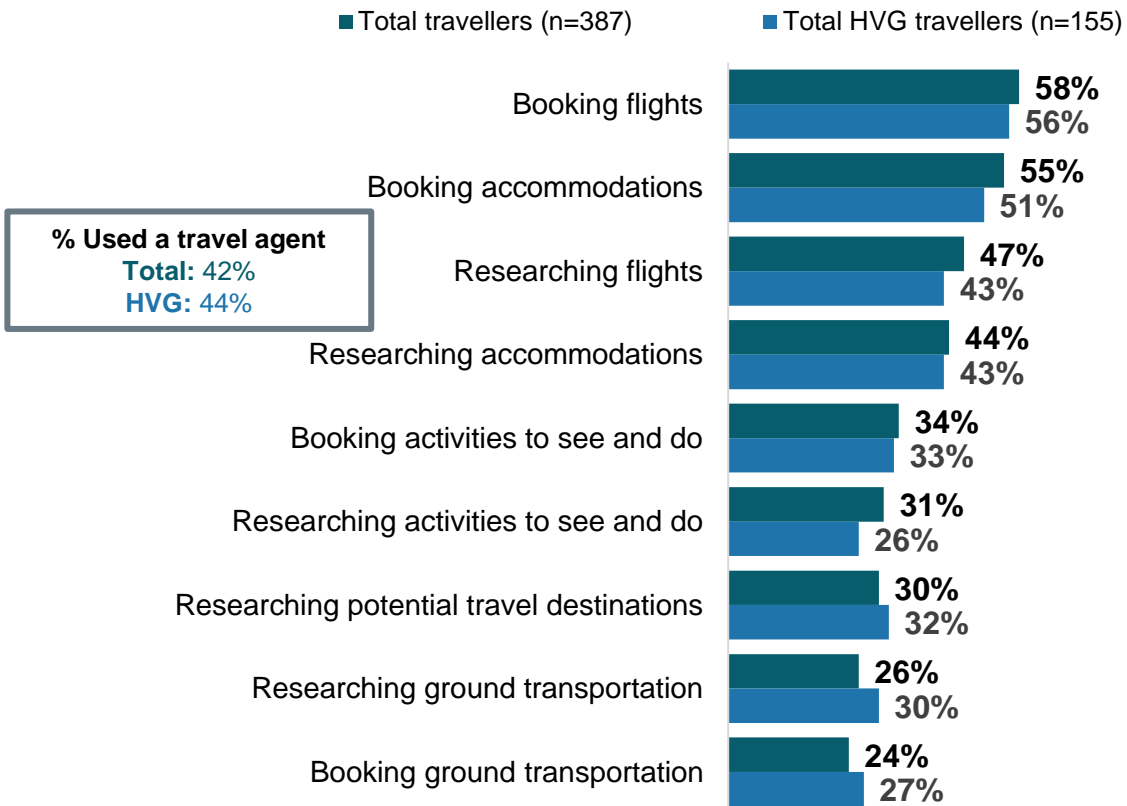


# Travel Agents/Tour Operator Usage For Recent Trip

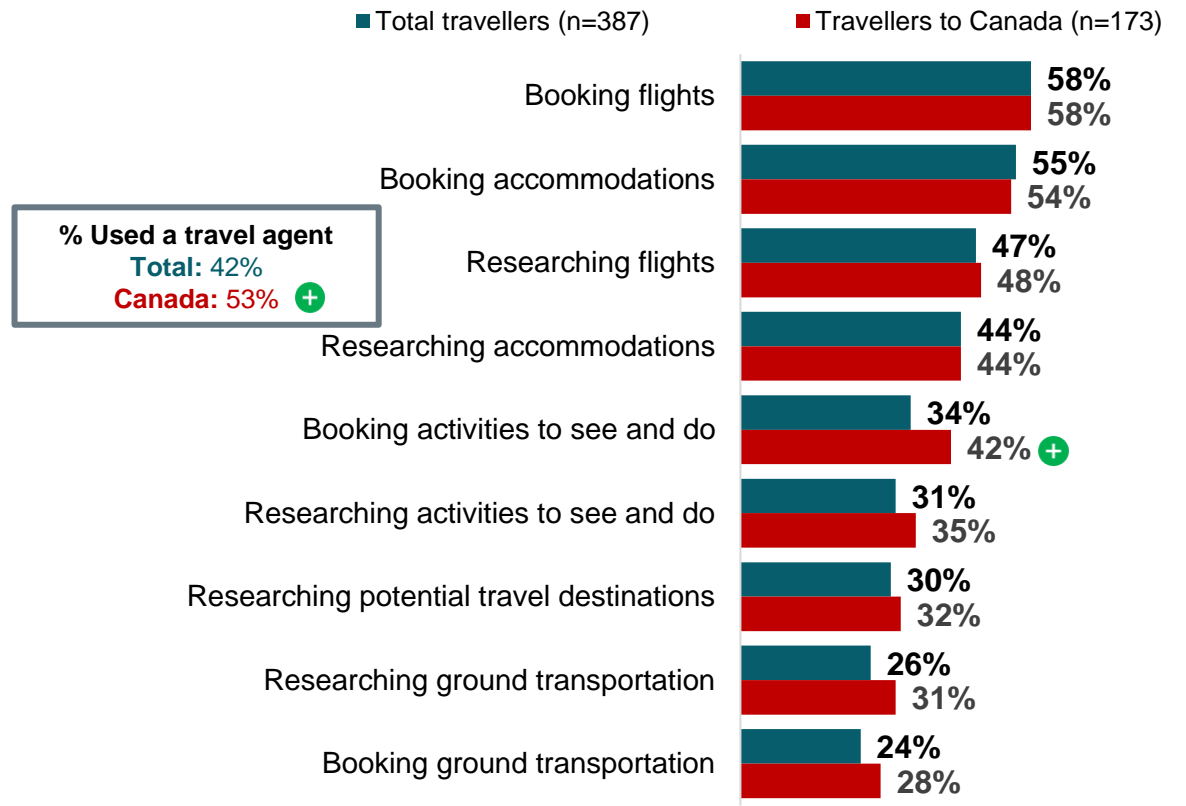


Among those who opt for an agent, the most used services are the booking of accommodations and flights. Travellers to Canada are significantly more likely to use travel agents or tour operators and specifically for booking activities to see and do.

**Total Travellers to Any Destination vs. HVG Travellers to Any Destination**



**Total Travellers to Any Destination vs. Total Travellers to Canada**



Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination, Used a Travel Agent/Tour Operator (n=387); HVG (n=155); Travellers to Canada (n=173)

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 Mundo Joven or Viajes El Corte Inglés, they do not include online booking engines like Despegar or BestDay. Did you use a travel agent or tour operator to help you research or book your trip? (Select one)

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

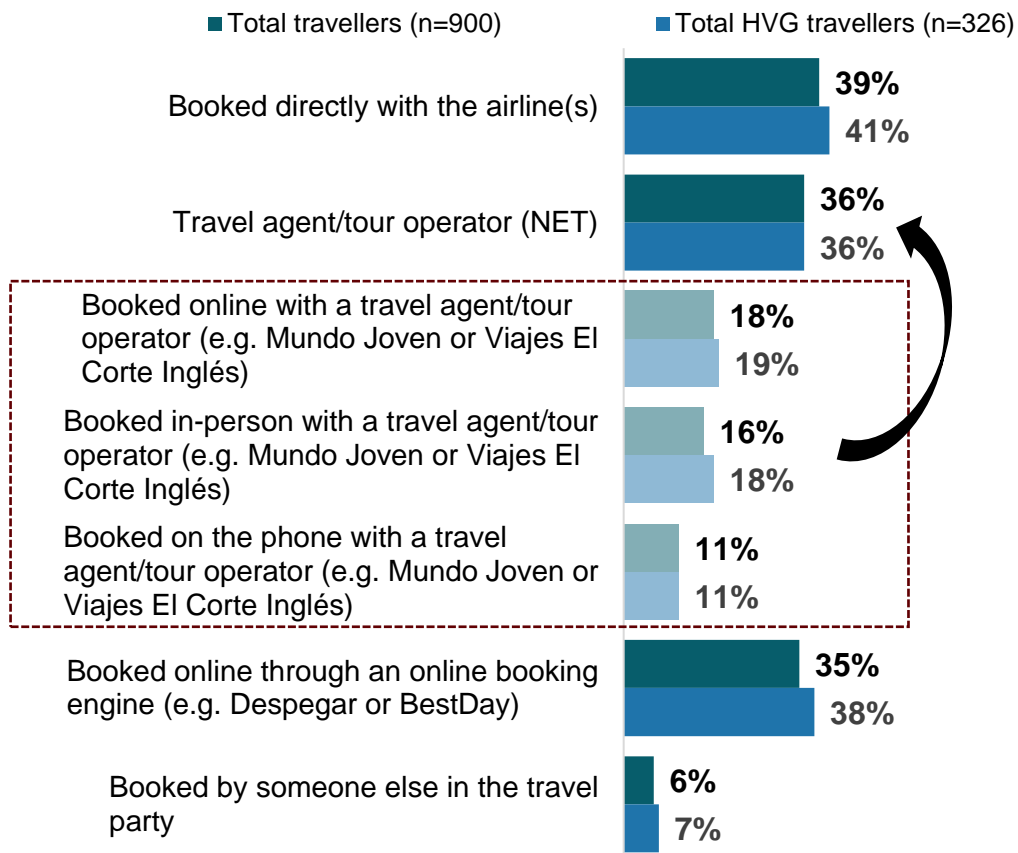
+ / - = significantly higher/lower result (vs. Total)



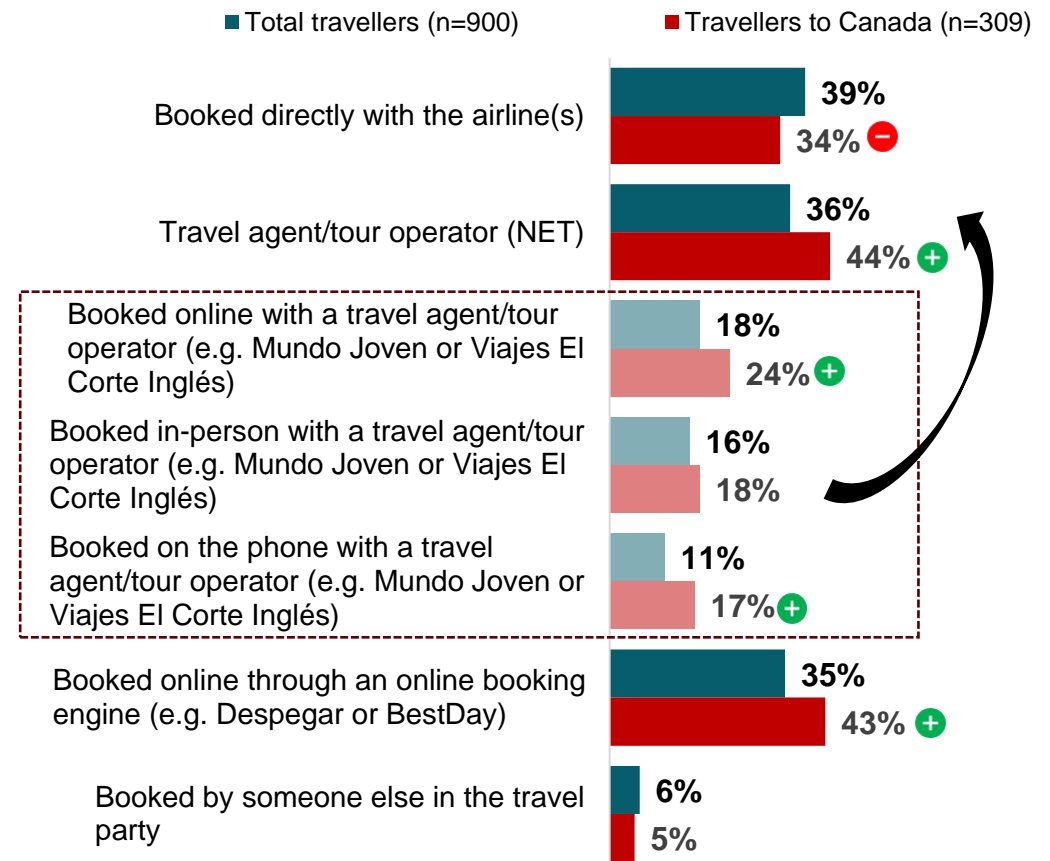
# Booking Flights For Recent Trip

**Mexican travellers and HVGs are most likely to book flights directly with airlines. The NET usage of travel agents is on par with direct airline bookings and online booking engines and it is particularly high for trips to Canada.**

## Total Travellers to Any Destination vs. HVG Travellers to Any Destination



## Total Travellers to Any Destination vs. Total Travellers to Canada

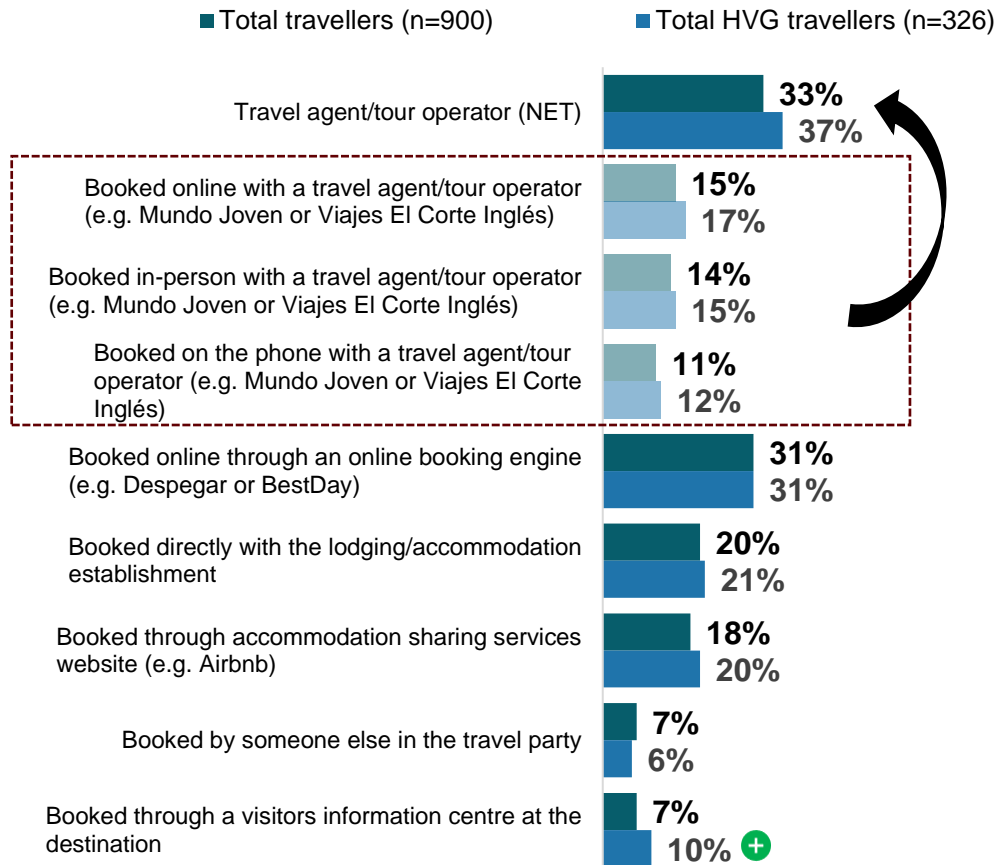




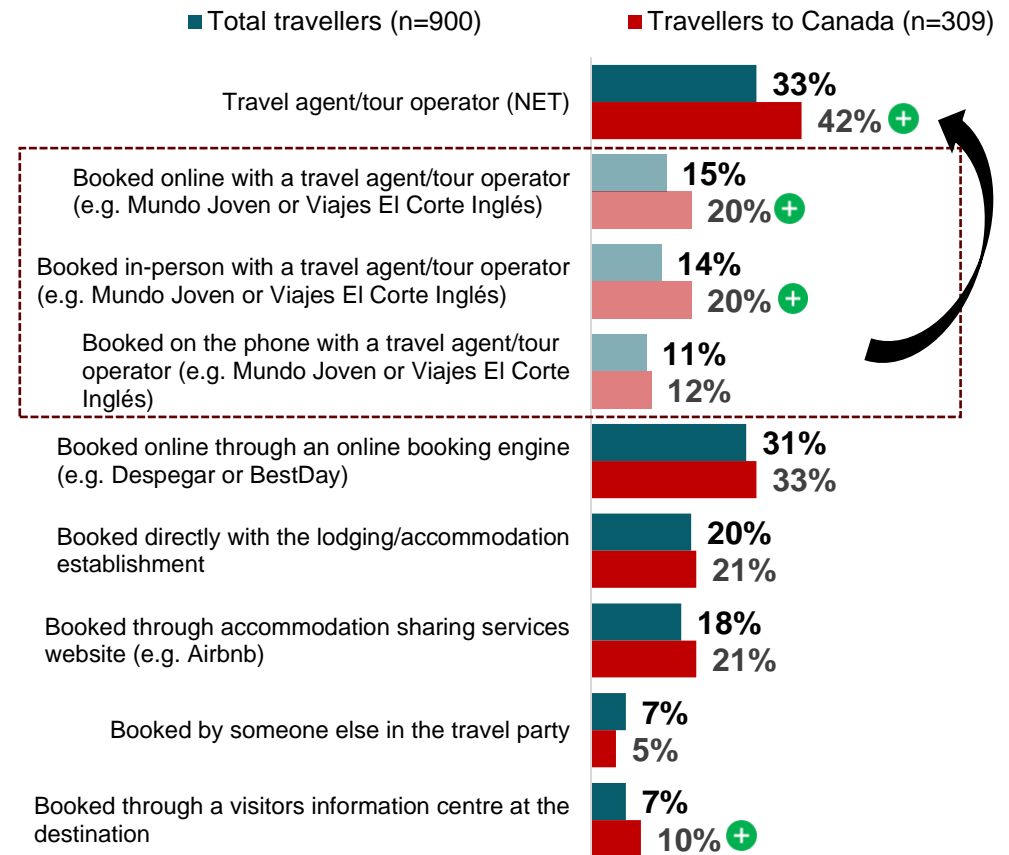
# Booking Accommodations For Recent Trip

**Mexican travellers and HVGs are most likely to book accommodations through travel agents and tour operators, followed by online booking engines. The usage of travel agents and tour operators is more prevalent for trips to Canada overall and specifically for online and in-person agents.**

**Total Travellers to Any Destination vs. HVG Travellers to Any Destination**



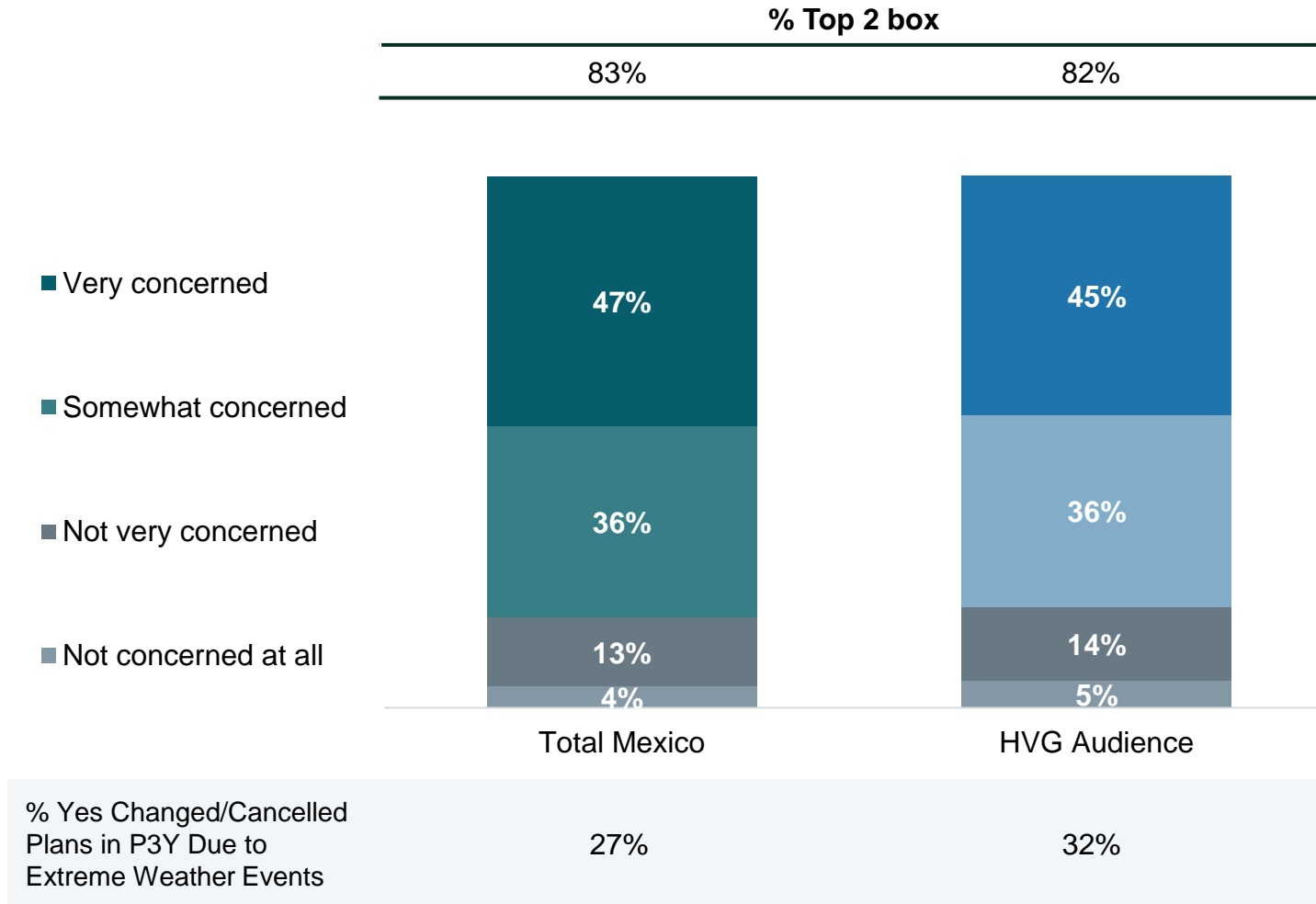
**Total Travellers to Any Destination vs. Total Travellers to Canada**



# Impact of Extreme Weather Events on Travel Plans



**Four out of five travellers are either somewhat or very concerned about extreme weather events impacting their travel plans; a quarter of travellers have had to change plans in the past 3 years due to weather.**



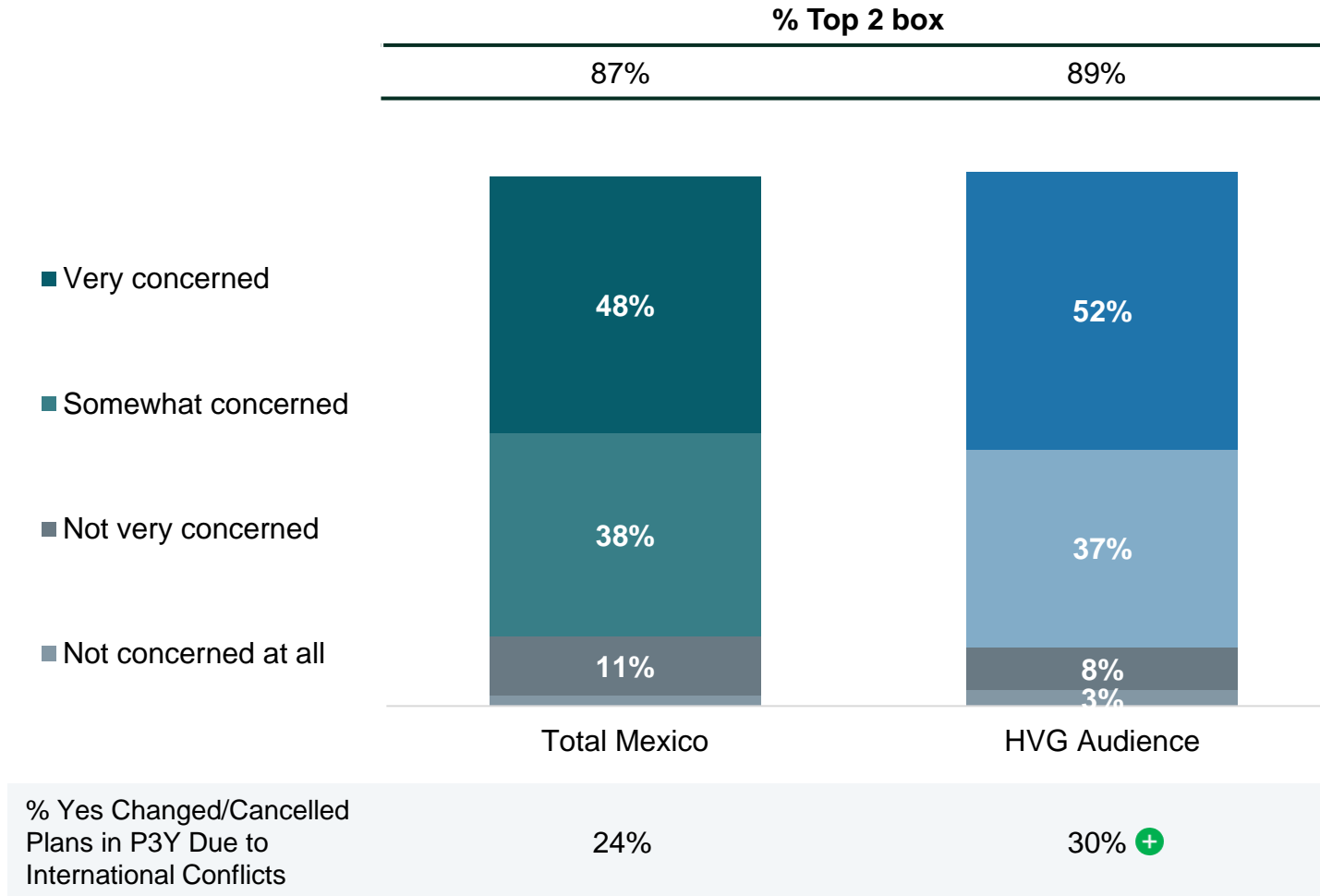
## Extreme Weather Events Description

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.

# Impact of International Conflicts & Unrest on Travel Plans



**International conflicts are a major concern for travellers in Mexico, with nine out of ten travellers either somewhat or very concerned.**



## International Conflicts Description


As you may or may not be aware, international conflicts and unrest are currently occurring in different regions around the world.





# Canada vs. Competitive Destinations

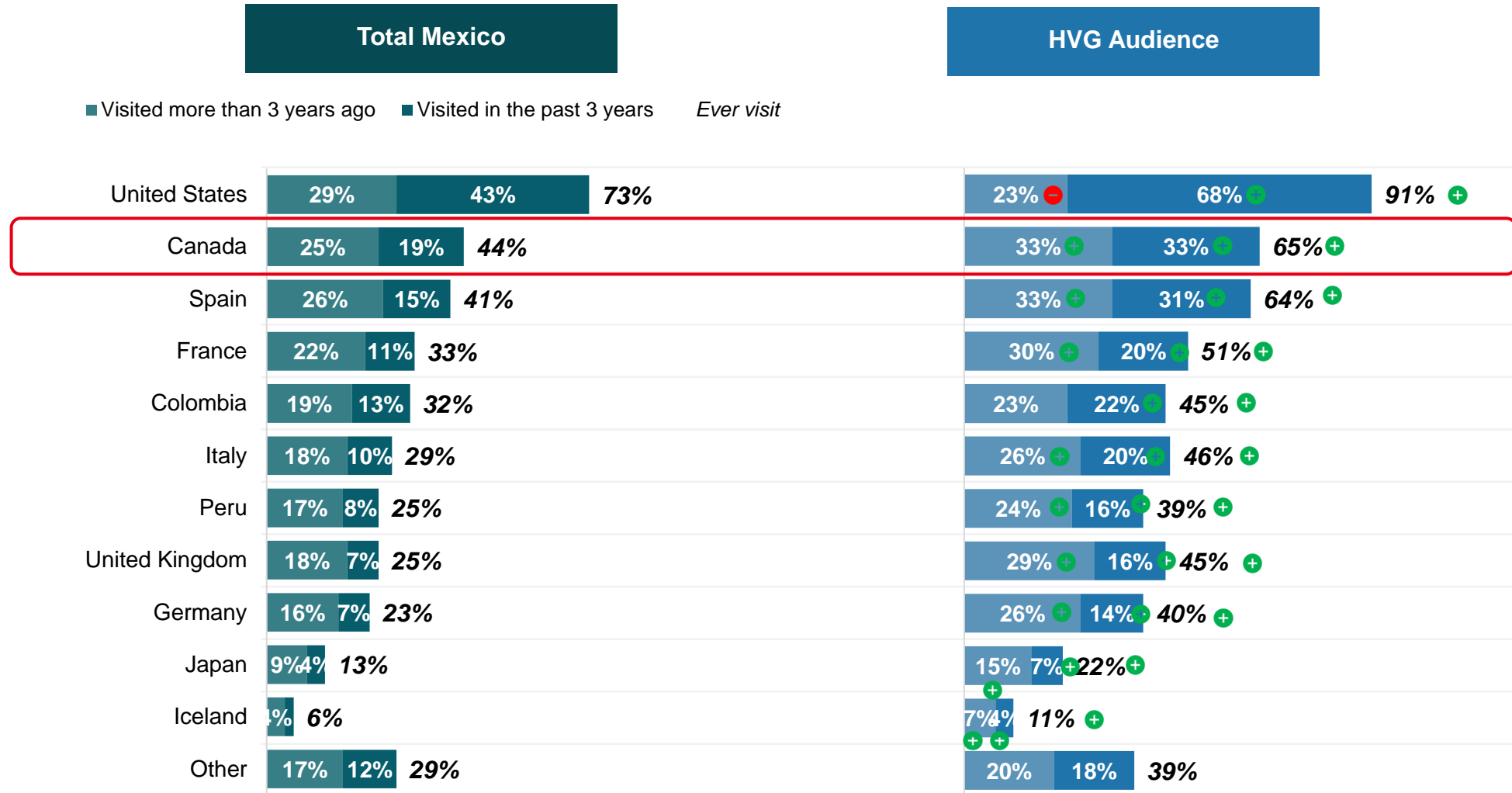


 Peggy's Cove  
Nova Scotia



# Past Visitation

Canada ranks 2<sup>nd</sup> behind the United States in terms of travel destinations ever visited by Mexicans amongst both total and HVG audience.

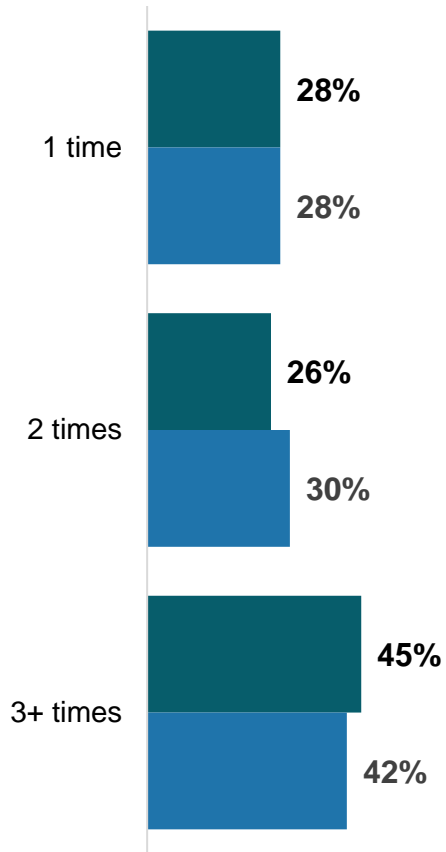


# Number of Visits Ever & Time of Year Visited Canada

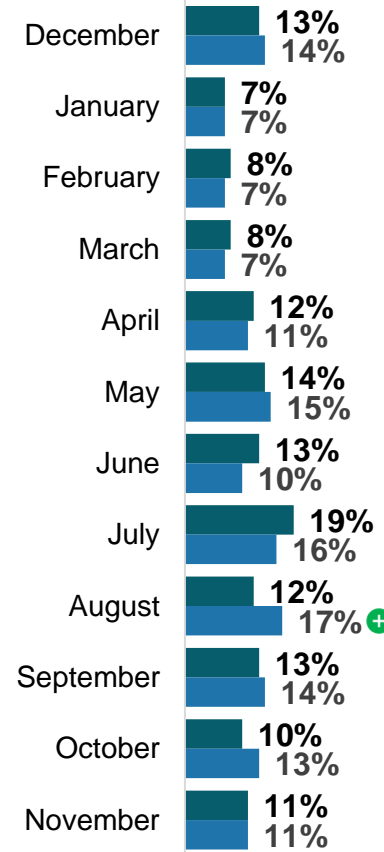


Over four in ten long-haul travellers in Mexico have visited Canada at least three times. While summer has the largest share of past trips, travel in spring and fall months are not far behind.

■ Total Travellers ■ Total HVG Travellers



■ Total Travellers ■ Total HVG Travellers



	Total Travellers	Total HVG Travellers
Winter	25%	25%
Spring	30%	30%
Summer	37%	36%
Fall	30%	32%

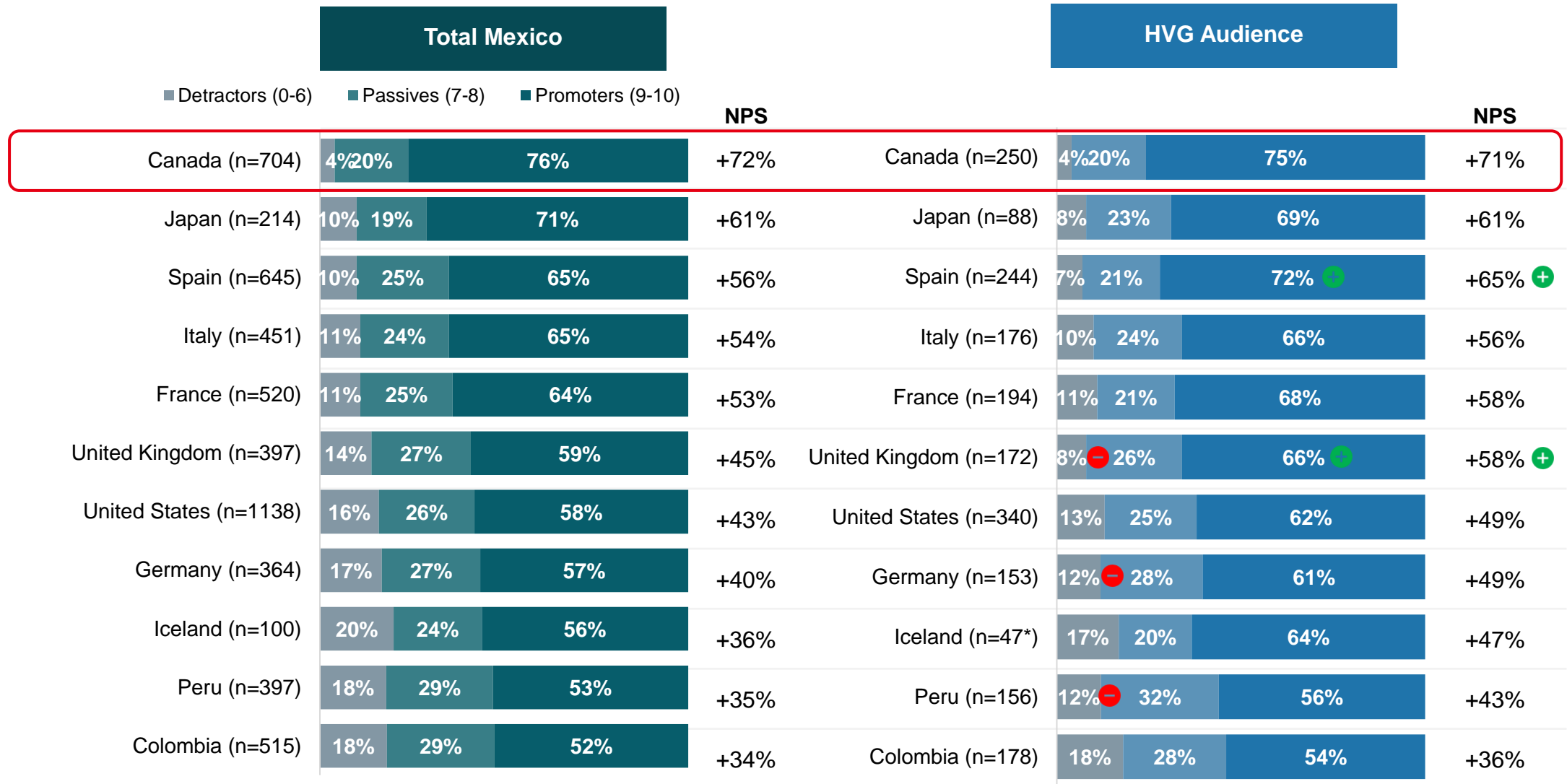




# Net Promoter Score (NPS)



About three quarters of those who visited Canada would recommend the country as a travel destination, ranking first among both total Mexican travellers and the HVG audience.



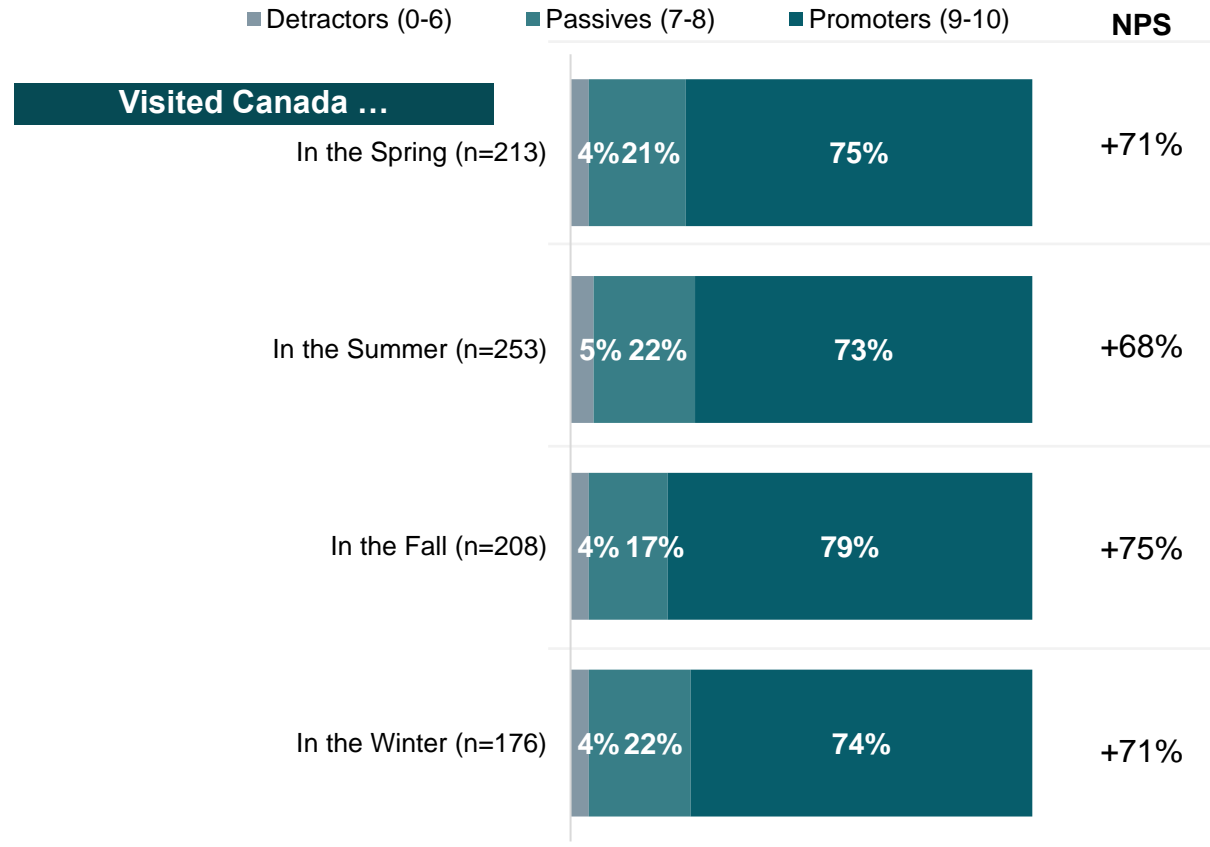
Note: all respondents evaluated countries they have ever visited from the competitive set.  
 Base: Long-haul pleasure travellers (past 3 years or next 2 years), Visited [DESTINATION]  
 C8. How likely are you to recommend each of the following holiday destinations to a friend, family member or colleague?  
 \*Small base size, interpret with caution (n<50)



# Canada Net Promoter Score (NPS) by Season



Canada's NPS is highest among those who visited in the Fall but is similar across all seasons.



## TOTAL MEXICO

Increase in Mexicans agreeing they usually like to go back to the same place for vacation (55%)

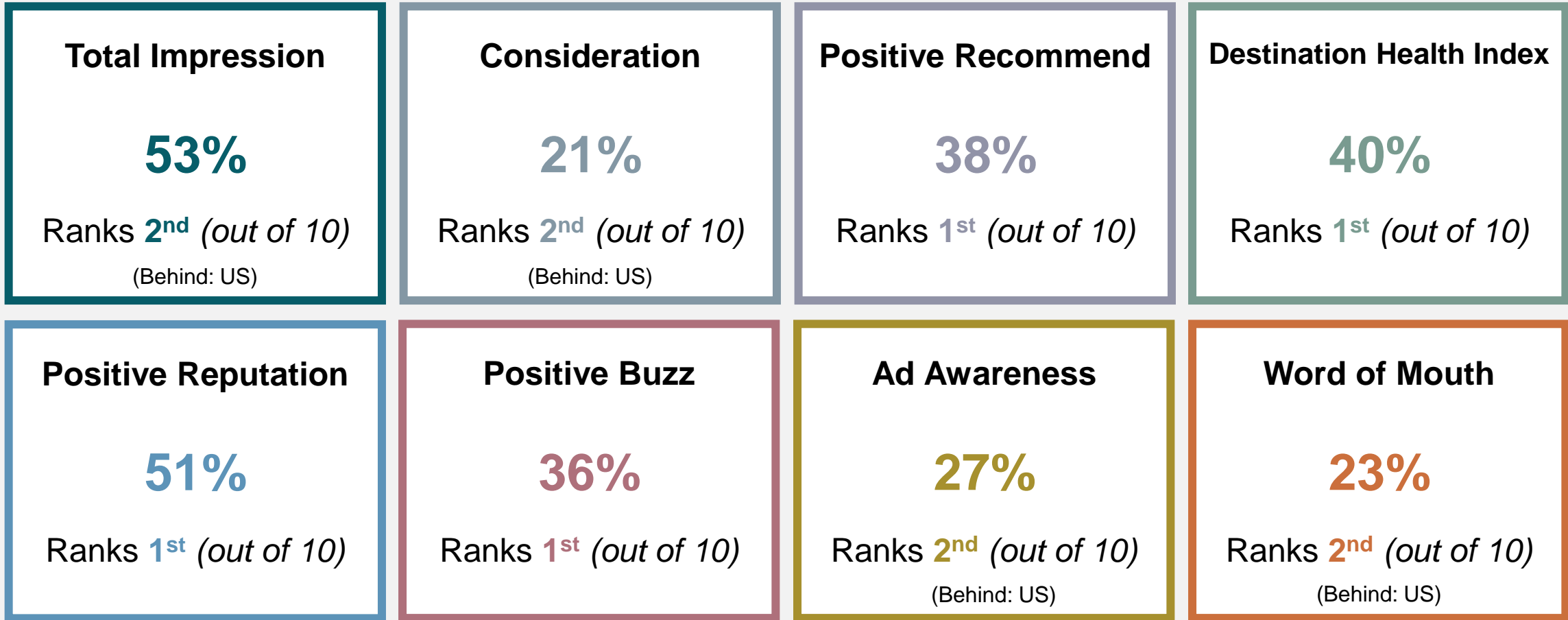
YouGov Global Travel Profiles (Mexico)  
 – 2023 Base: Target regions (México D.F, Nuevo León & Jalisco)  
 18+

Note: all respondents evaluated countries they have ever visited from the competitive set.  
 Base: Long-haul pleasure travellers (past 3 years or next 2 years), Visited **Canada**  
 C8. How likely are you to recommend each of the following holiday destinations to a friend, family member or colleague?  
 F20. What time of year have you ever visited Canada? Select all that apply.

# Performance Scorecard for Canada



Canada as a destination performed well in the Mexican market in 2023, ranking 1<sup>st</sup> (out of 10 destinations) in four of eight key performance metrics and in the top two for all metrics.



## TOTAL MEXICO

Competitive set: US, Italy, Spain, Japan, France, Colombia, Germany, UK, Peru



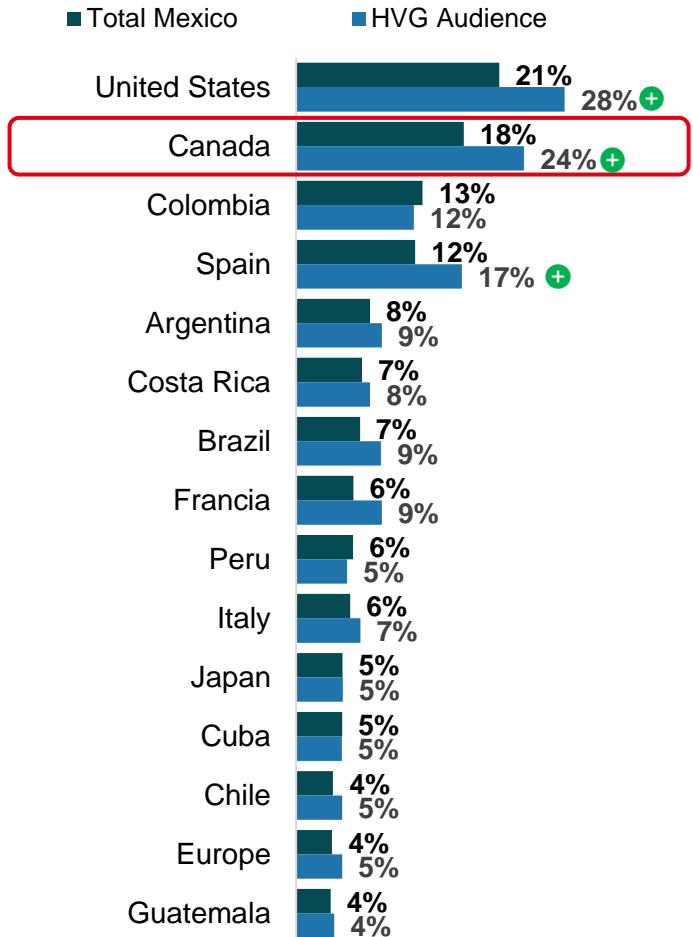


# Unaided Long-Haul Destination Consideration (Next 2 Years)

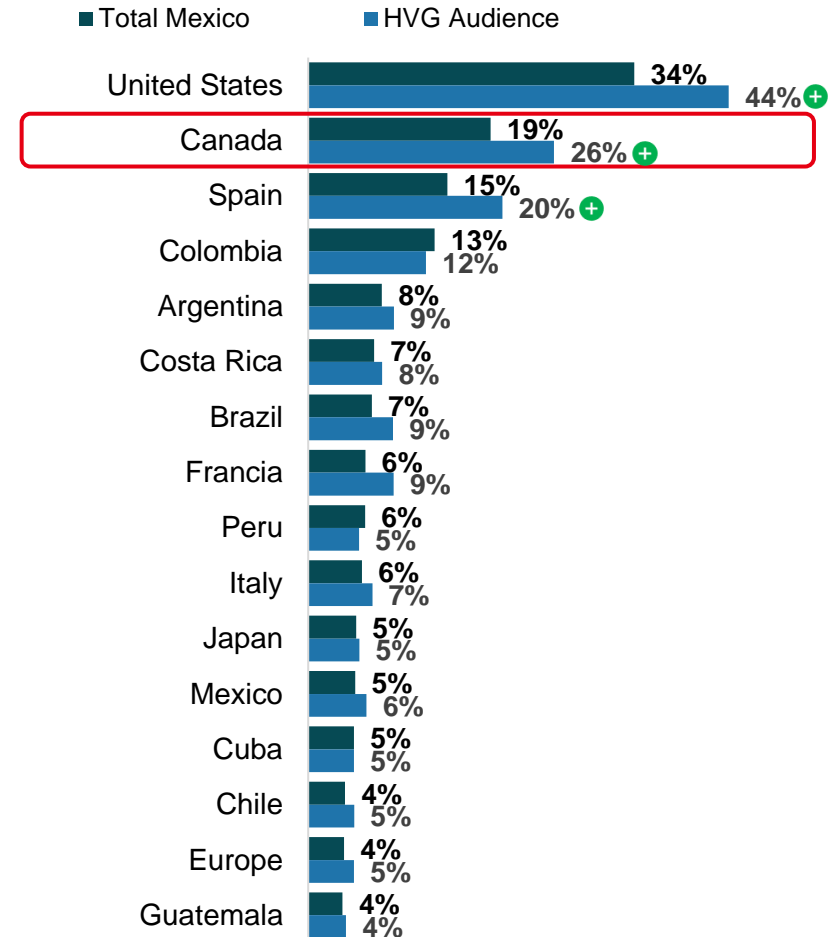


Canada receives the 2<sup>nd</sup> most unaided mentions as a destination being considered by Mexican travellers, behind only the US. Spain has significantly higher consideration among HVGs in this market, ranking 3<sup>rd</sup> ahead of Colombia.

**Top Destination Brands<sup>1</sup>**



**Top Destinations<sup>2</sup>**

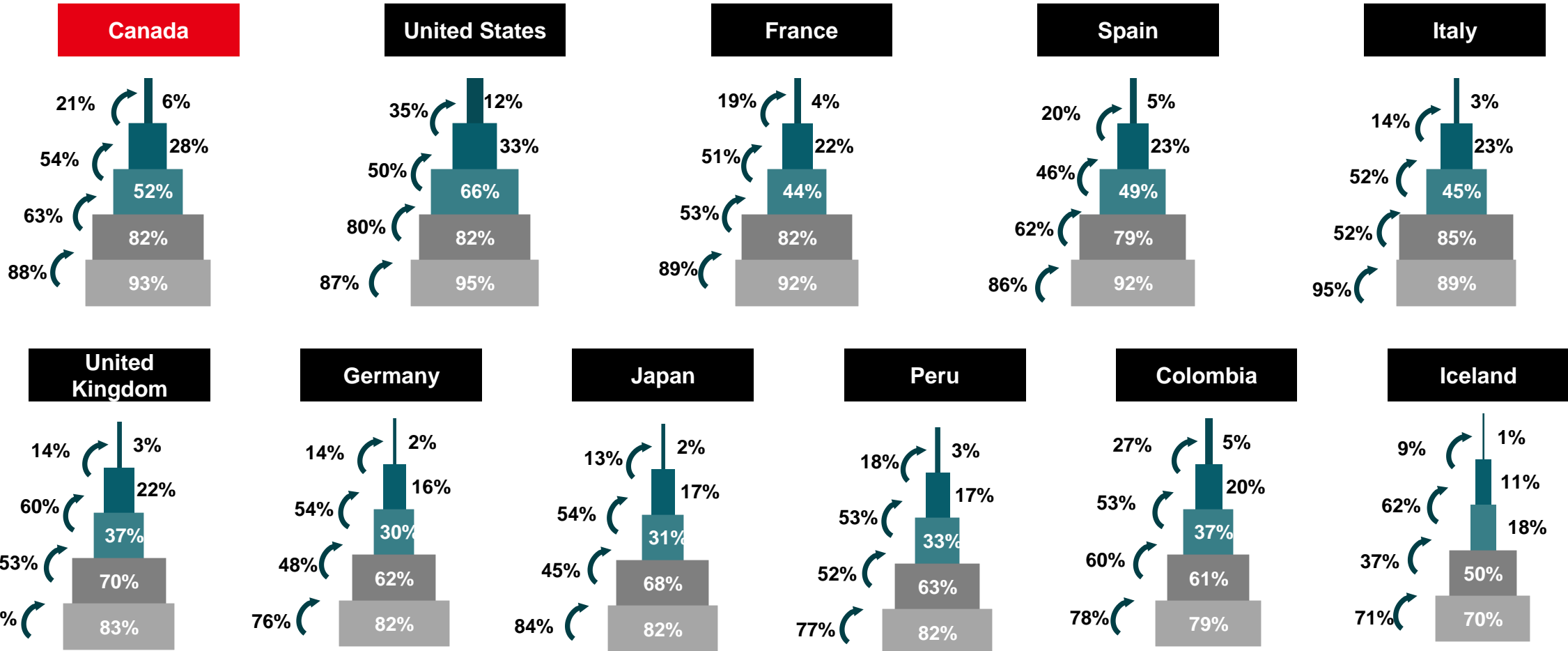


<sup>1</sup> Responses as mentioned by respondents (e.g., percentage who said "Canada" specifically).  
<sup>2</sup> Roll-up of brand mentions by country (e.g., percentage who said "Canada" or any destination in Canada).  
 Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1571); HVG (n=376)  
 B1. You mentioned that you are likely to take a long-haul holiday trip in the next 2 years. Which destinations are you seriously considering? (Please list up to 3 destinations)



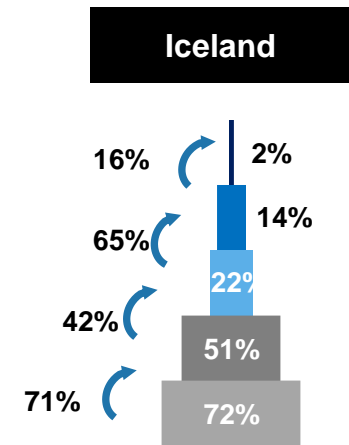
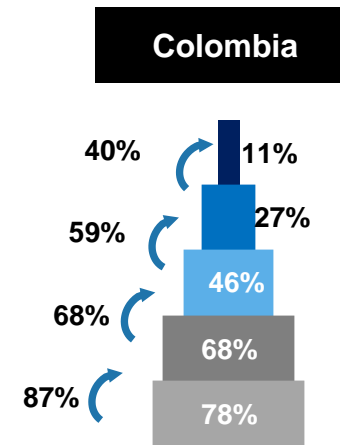
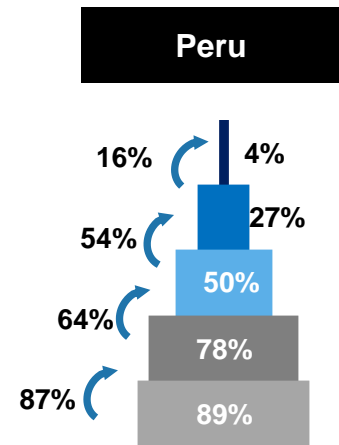
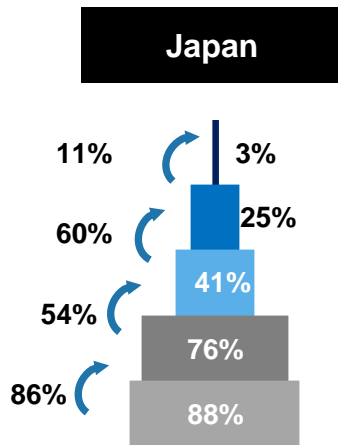
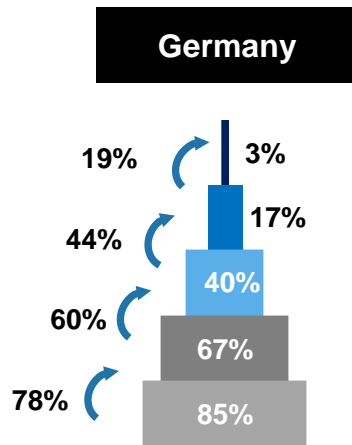
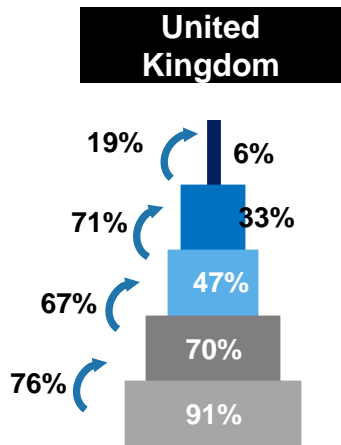
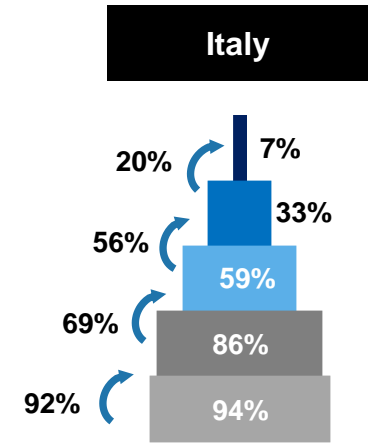
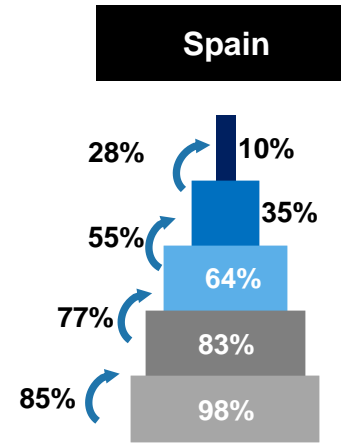
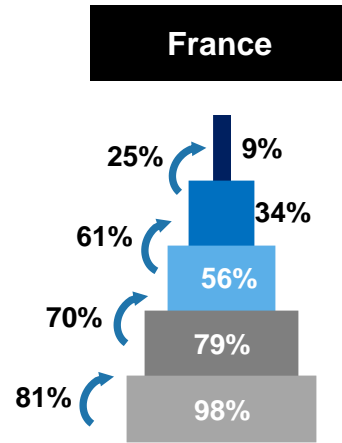
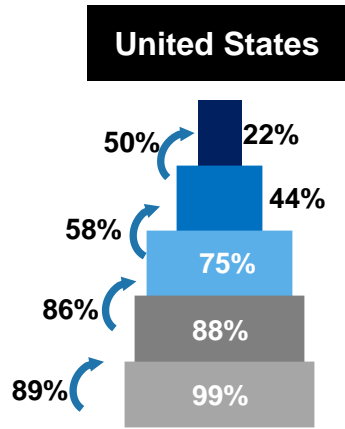
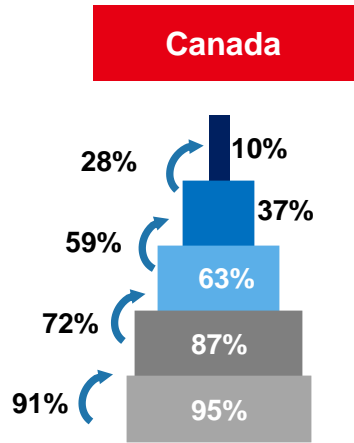
# Consideration Funnels: Total Mexican Travellers

About half of Mexican travellers are seriously considering Canada as a travel destination; this level is similar to Spain, but behind the US.



# Consideration Funnels: Among HVG Audience

Compared to total Mexican travellers, Canada has higher commitment rates among HVGs. Again, consideration levels for Canada are behind the US but on par with Spain.



# Destination Consideration By Seasons



When looking at consideration by season, Canada's consideration is similar across seasons. Canada and the US have the highest consideration for travel during the Winter and Fall months.

Total Mexico	Winter (Dec, Jan, Feb)	Spring (Mar, Apr, May)	Summer (Jun, Jul, Aug)	Fall (Sept, Oct, Nov)
<b>Canada</b> (n=1311)	38%	36%	39%	33%
<b>Colombia</b> (n=294)	31%	46%	37%	26%
<b>France</b> (n=388)	32%	41%	42%	33%
<b>Germany</b> (n=298)	29%	35%	45%	28%
<b>Iceland</b> (n=243)	30%	42%	40%	33%
<b>Italy</b> (n=409)	29%	39%	39%	33%
<b>Japan</b> (n=329)	30%	38%	42%	32%
<b>Peru</b> (n=306)	25%	46%	35%	26%
<b>Spain</b> (n=363)	25%	41%	44%	33%
<b>United Kingdom</b> (n=333)	25%	44%	44%	30%
<b>United States</b> (n=392)	42%	37%	40%	38%

HVG Audience	Winter (Dec, Jan, Feb)	Spring (Mar, Apr, May)	Summer (Jun, Jul, Aug)	Fall (Sept, Oct, Nov)
<b>Canada</b> (n=332)	39%	37%	40%	38% +
<b>Colombia</b> (n=75)	33%	53%	33%	39% +
<b>France</b> (n=86)	33%	45%	48%	37%
<b>Germany</b> (n=80)	33%	43%	43%	32%
<b>Iceland</b> (n=58)	20%	47%	45%	24%
<b>Italy</b> (n=110)	32%	39%	45%	39%
<b>Japan</b> (n=83)	23%	47% +	41%	33%
<b>Peru</b> (n=86)	26%	53%	40%	32%
<b>Spain</b> (n=93)	29%	52% +	46%	31%
<b>United Kingdom</b> (n=85)	25%	49%	48%	37%
<b>United States</b> (n=103)	46%	43%	45%	43%

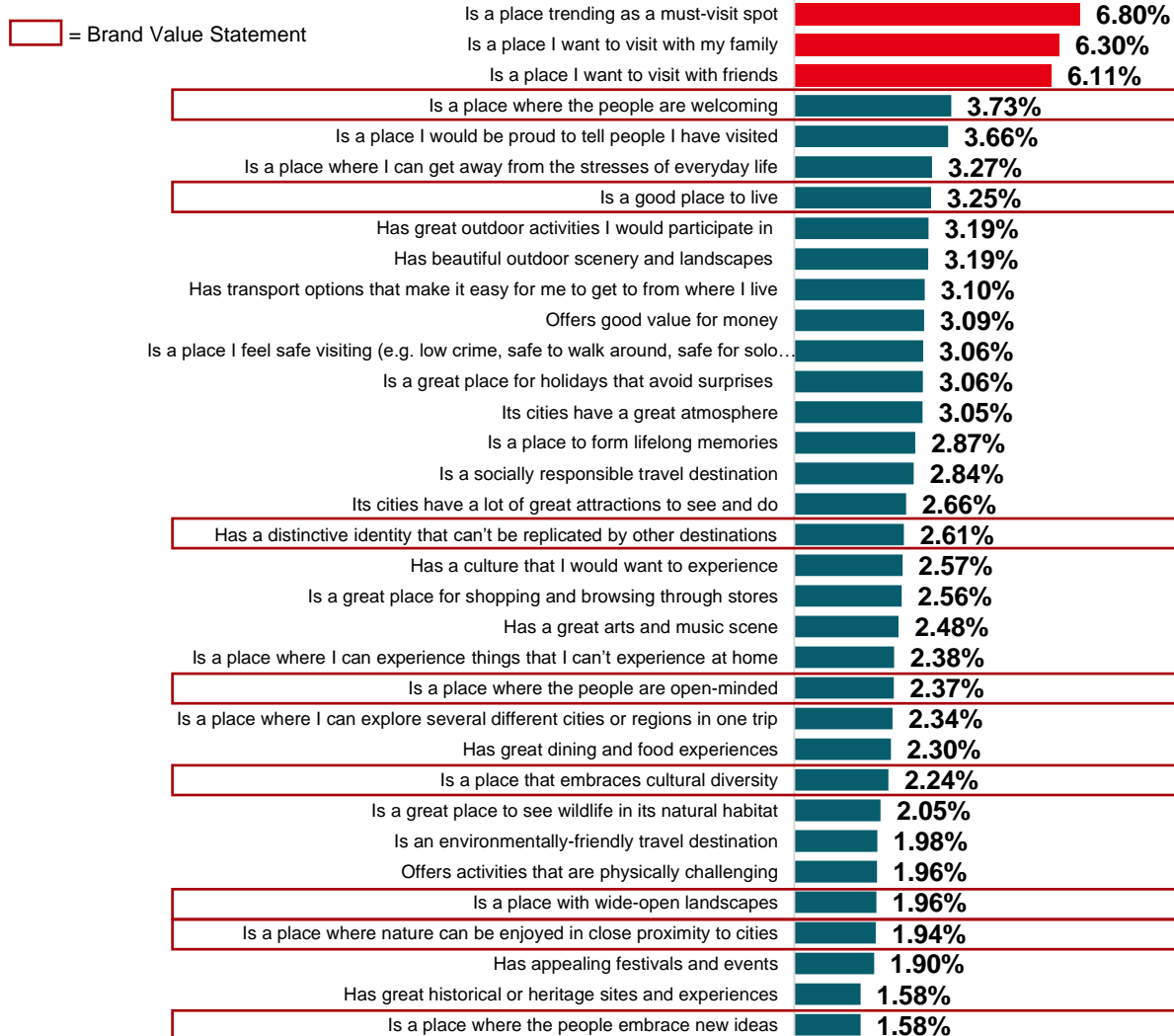




# Destination Attributes: Drivers Analysis



**The most influential aspects of consideration are: trending as a must-visit spot, a place I want to visit with my family/friends and a place where the people are welcoming. Of the brand value statements, welcoming people and being a good place to live are the most impactful statements to consideration.**



## Description

Key drivers analysis (KDA) seeks to identify the strongest predictors of a dependent variable. In this case, we used consideration of a destination (C2) as the dependent variable. The analysis uses a mix of linear and logistic regressions, assessing the simultaneous effect of many independent variables, destination attributes (C6) while controlling for each other.

## Interpretation

Attributes with a high percentage level are more likely to impact consideration of a destination. This generally means that destinations that score highly on the top attributes may have higher consideration levels. Each percentage does also indicate the degree of relative impact. An attribute with a score of 5% is twice as impactful on consideration as an attribute with a score of 2.5%.

## TOTAL MEXICO

While not prioritizing social media for trip planning, Mexicans view it as a prime channel for effective advertising (47%)

YouGov Global Travel Profiles (Mexico) – 2023 Base: Target regions (México D.F, Nuevo León & Jalisco) 18+



# Destination Attributes – Relative Strengths & Weaknesses: Among Total Mexico

Canada stands out as a safe, environmentally friendly country that offers activities that are physically challenging and is a great place to see wildlife.



		Canada	Colombia	France	Germany	Iceland	Italy	Japan	Peru	Spain	United Kingdom	United States
	n=	1571	470	469	465	473	478	471	473	467	472	475
Higher Order Motivations	Is a place where I can get away from the stresses of everyday life					Strength						
	Is a place to form lifelong memories											
	Is a place I would be proud to tell people I have visited											Weakness
General Needs	Is a place I feel safe visiting (e.g. low crime, safe to walk around, safe for solo travel etc.)	Strength	Weakness		Strength	Strength		Strength	Weakness			
	Is a place where I can explore several different cities or regions in one trip					Weakness						
	Offers good value for money											
	Has transport options that make it easy for me to get to from where I live					Weakness						Strength
Type of Trip	<b>Is a place I want to visit with friends</b>											
	<b>Is a place I want to visit with my family</b>											
	Is a great place for holidays that avoid surprises		Weakness						Weakness			Strength
	Is a place where I can experience things that I can't experience at home											
	Is an environmentally-friendly travel destination	Strength	Weakness			Strength		Strength		Weakness		
	Is a socially responsible travel destination		Weakness					Strength				
	<b>Is a place trending as a must-visit spot</b>											
To-Do	Offers activities that are physically challenging	Strength		Weakness		Strength	Weakness		Strength	Weakness		Strength
	Is a great place for shopping and browsing through stores		Weakness			Weakness			Weakness			Strength
	Its cities have a lot of great attractions to see and do											
	Has great outdoor activities I would participate in								Strength			
	Has great dining and food experiences	Weakness	Strength	Strength		Weakness	Strength			Strength	Weakness	
	Has a great arts and music scene	Weakness				Weakness			Weakness		Strength	
	Has appealing festivals and events	Weakness				Weakness			Weakness			Strength
To-See	Its cities have a great atmosphere											
	Has beautiful outdoor scenery and landscapes					Strength			Strength			
	Is a great place to see wildlife in its natural habitat	Strength	Strength	Weakness		Strength	Weakness		Strength	Weakness		
	Has great historical or heritage sites and experiences	Weakness				Weakness			Strength			Weakness
	Has a culture that I would want to experience	Weakness						Strength	Strength			Weakness

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 [DESTINATION] C6. We are interested in your general impressions about destinations even if you have never been there. Please select all the destinations you think apply to the statement. Select "None of these" if you think none of the destinations apply.



# Brand Value Statements: Among Total Mexico



*Canada is seen as a good place to live and a place that allows one to enjoy nature close to cities, while United States recognized as a place where people are open-minded.*

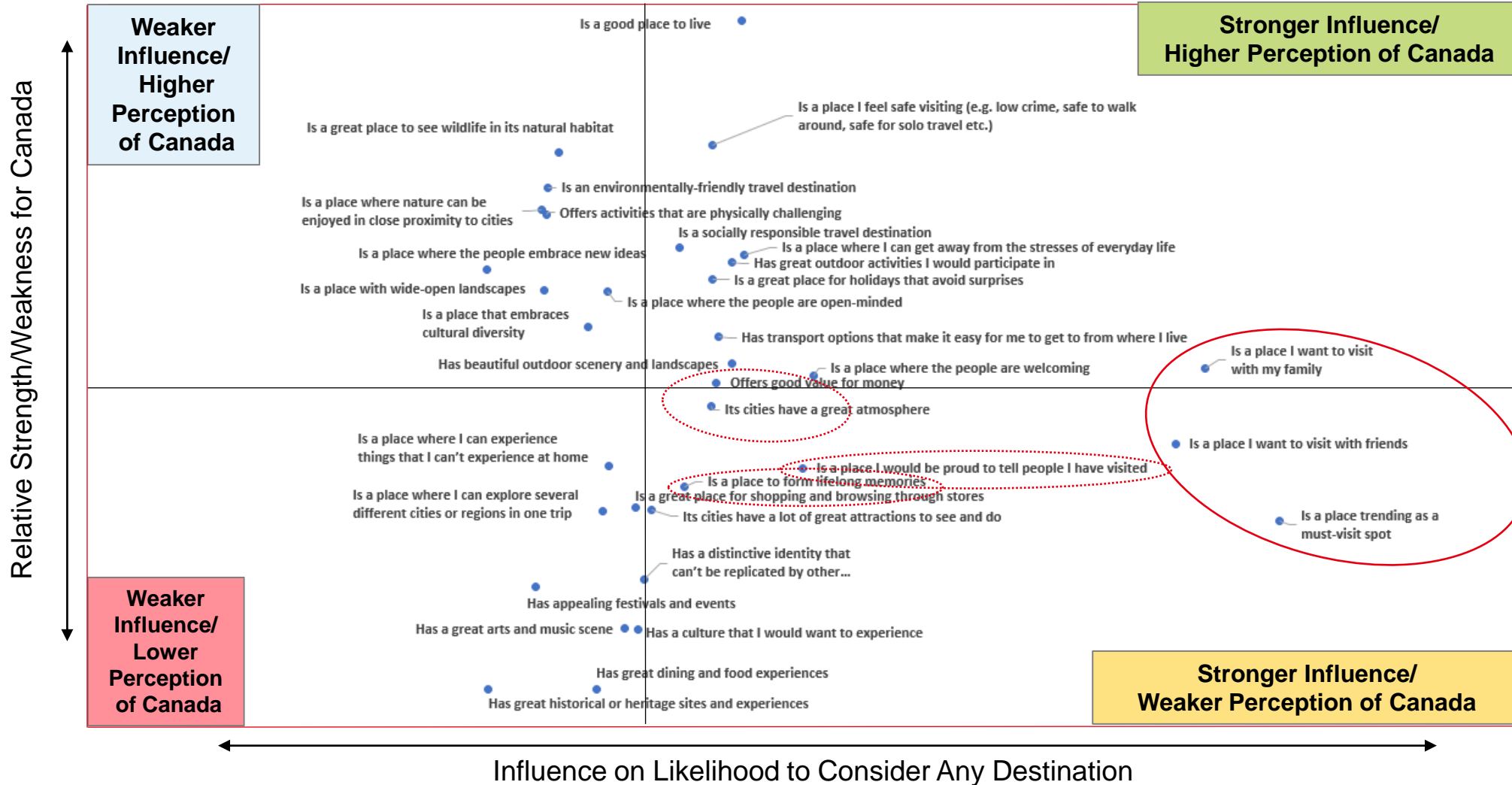
	Canada	Colombia	France	Germany	Iceland	Italy	Japan	Peru	Spain	United Kingdom	United States
n=	1571	470	469	465	473	478	471	473	467	472	475
Is a place with wide-open landscapes					Strength			Strength			
Is a place where nature can be enjoyed in close proximity to cities	Strength		Weakness		Strength	Weakness		Strength			
Is a place that embraces cultural diversity											
Is a place where the people are welcoming		Strength		Weakness			Weakness	Strength		Weakness	Weakness
Is a place where the people are open-minded				Strength			Weakness	Weakness			Strength
Is a place where the people embrace new ideas								Weakness			
Is a good place to live	Strength	Weakness						Weakness			
Has a distinctive identity that can't be replicated by other destinations	Weakness						Strength				Weakness

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 [DESTINATION] C6. We are interested in your general impressions about destinations even if you have never been there. Please select all the destinations you think apply to the statement. Select "None of these" if you think none of the destinations apply.



# Canada Strengths & Opportunities: Total Mexico

Given the strong influence trending as a must-visit spot and visitation with friends have on consideration to visit a country, and Canada's relatively lower perceptions on these statements, these drivers could be prioritized to try to move the needle.

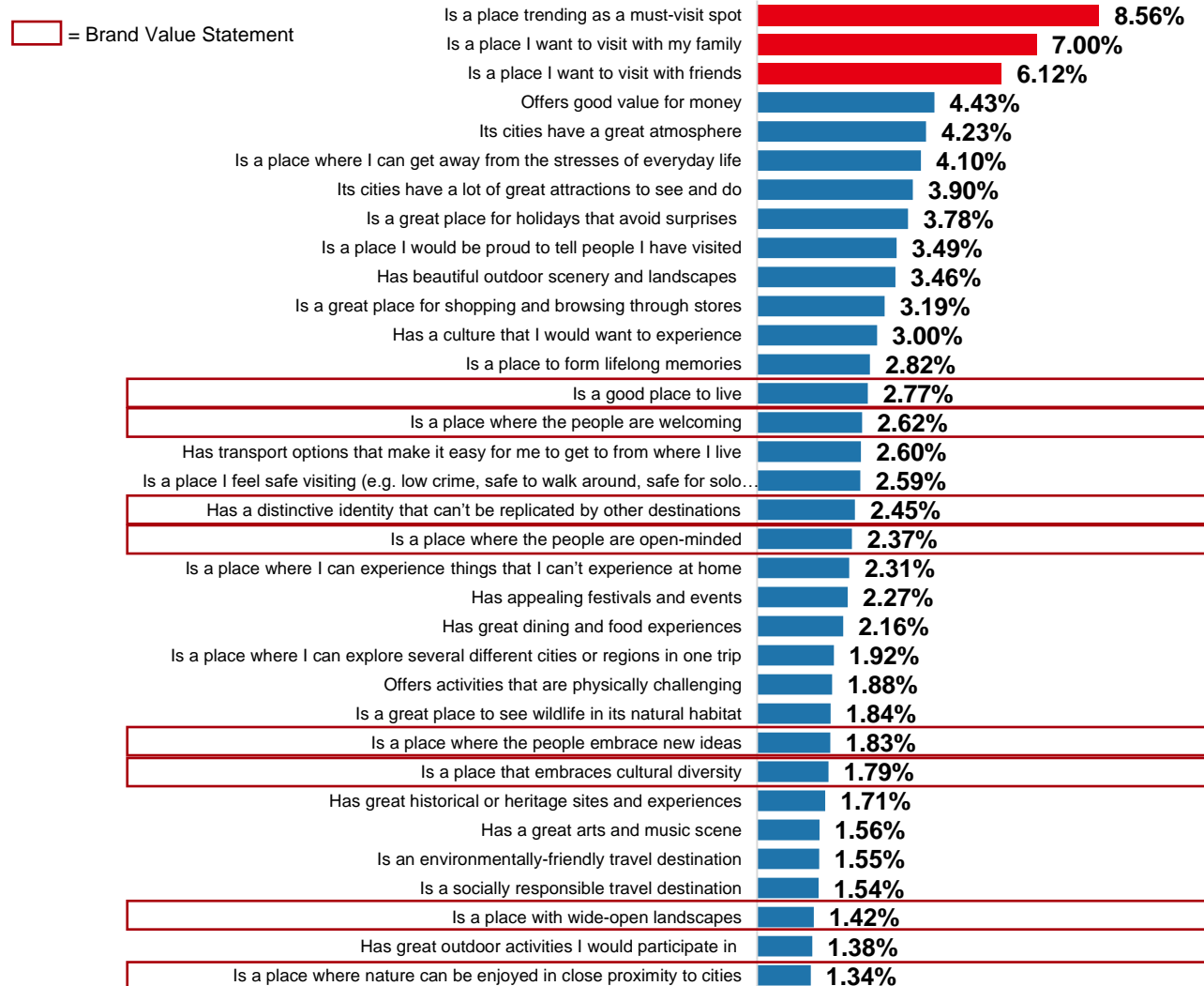




# Destination Attributes: Drivers Analysis: Among HVG Audience



The most influential aspects of consideration among HVGs are: trending as a must-visit spot and a place I want to visit with my family/friends.



## Description

Key drivers analysis (KDA) seeks to identify the strongest predictors of a dependent variable. In this case, we used consideration of a destination (C2) as the dependent variable. The analysis uses a mix of linear and logistic regressions, assessing the simultaneous effect of many independent variables, destination attributes (C6) while controlling for each other.

## Interpretation

Attributes with a high percentage level are more likely to impact consideration of a destination. This generally means that destinations that score highly on the top attributes may have higher consideration levels. Each percentage does also indicate the degree of relative impact. An attribute with a score of 5% is twice as impactful on consideration as an attribute with a score of 2.5%.



# Destination Attributes – Relative Strengths & Weaknesses : Among HVG Audience



Among HVGs, Canada stands out as being a safe place, environmentally friendly, socially responsible and a great place to see wildlife. The United States has easy transport options, great for shopping, festivals and a place to avoid surprises. Both Canada and United States offer physically challenging activities.

		Canada	Colombia	France	Germany	Iceland	Italy	Japan	Peru	Spain	United Kingdom	United States
		n= 376	105	107	117	108	127	106	109	114	118	117
Higher Order Motivations	Is a place where I can get away from the stresses of everyday life								Strength			
	Is a place to form lifelong memories											
	Is a place I would be proud to tell people I have visited											Weakness
General Needs	Is a place I feel safe visiting (e.g. low crime, safe to walk around, safe for solo travel etc.)	Strength	Weakness		Strength		Weakness	Strength	Weakness			
	Is a place where I can explore several different cities or regions in one trip					Weakness						
	Offers good value for money											
	Has transport options that make it easy for me to get to from where I live					Weakness						Strength
Type of Trip	<b>Is a place I want to visit with friends</b>											
	<b>Is a place I want to visit with my family</b>											
	Is a great place for holidays that avoid surprises		Weakness									Strength
	Is a place where I can experience things that I can't experience at home							Strength				
	Is an environmentally-friendly travel destination	Strength	Weakness			Strength		Strength				Weakness
	Is a socially responsible travel destination	Strength				Strength		Strength				
To-Do	<b>Is a place trending as a must-visit spot</b>	Weakness		Strength			Strength					
	Offers activities that are physically challenging	Strength		Weakness		Strength	Weakness	Weakness	Strength	Weakness	Weakness	Strength
	Is a great place for shopping and browsing through stores			Strength		Weakness			Weakness		Strength	Strength
	Its cities have a lot of great attractions to see and do			Strength								
	Has great outdoor activities I would participate in										Weakness	
	Has great dining and food experiences	Weakness		Strength		Weakness	Strength			Strength	Weakness	
	Has a great arts and music scene	Weakness				Weakness			Weakness		Strength	
	Has appealing festivals and events	Weakness				Weakness			Weakness			Strength
To-See	Its cities have a great atmosphere								Weakness			
	Has beautiful outdoor scenery and landscapes					Strength						
	Is a great place to see wildlife in its natural habitat	Strength	Strength	Weakness		Strength	Weakness		Strength	Weakness	Weakness	
	Has great historical or heritage sites and experiences	Weakness				Weakness	Strength		Strength	Strength		Weakness
	Has a culture that I would want to experience	Weakness						Strength	Strength			Weakness

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), HVG Audience, Evaluated [DESTINATION]  
 C6. We are interested in your general impressions about destinations even if you have never been there. Please select all the destinations you think apply to the statement.  
 Select "None of these" if you think none of the destinations apply.



# Brand Value Statements: Among HVG Audience



Among HVGs, Canada stands out as a great place to live and a place that allows one to enjoy nature close to cities, while United States does not stand out on any of the brand value statements.

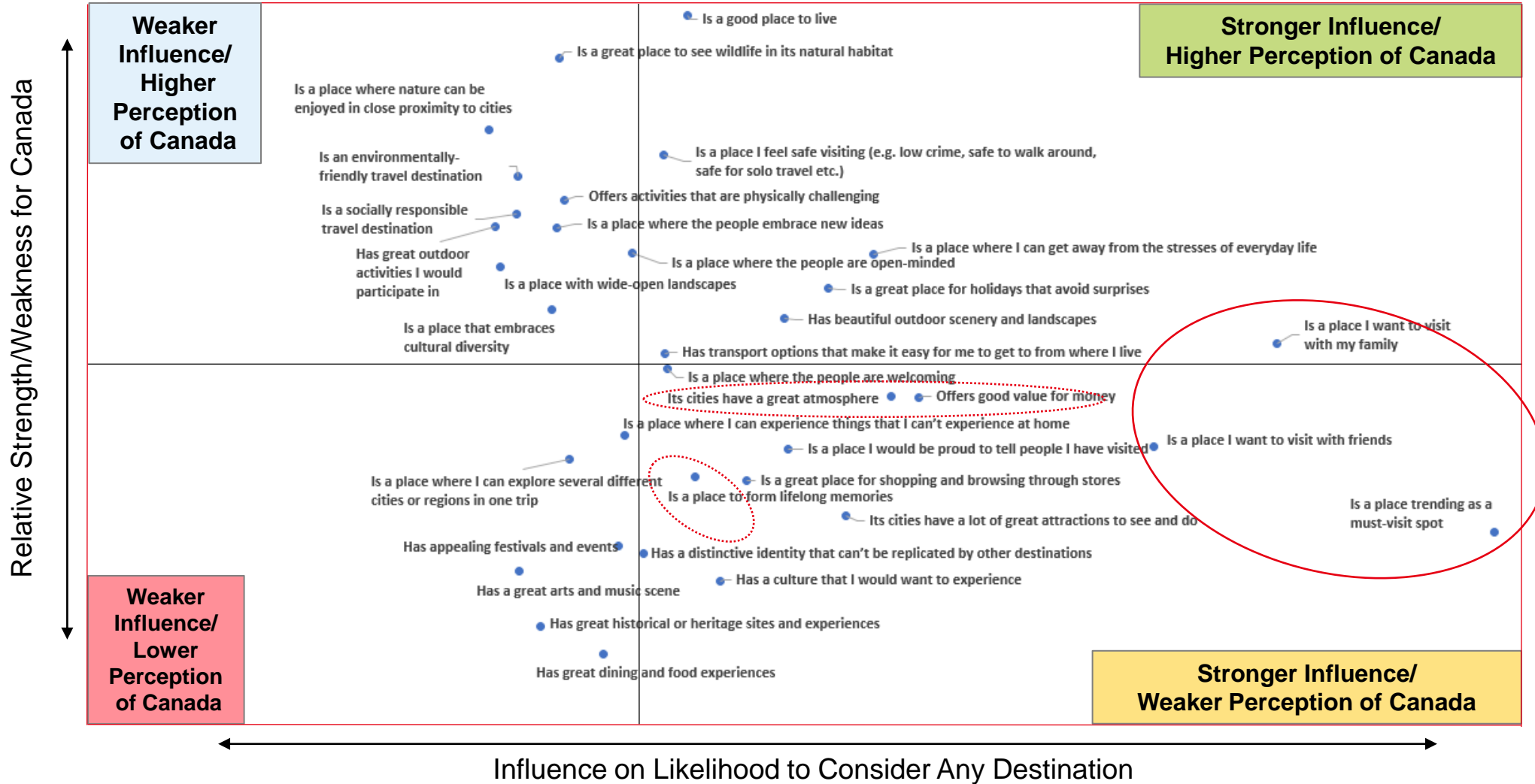
	Canada	Colombia	France	Germany	Iceland	Italy	Japan	Peru	Spain	United Kingdom	United States
n=	376	105	107	117	108	127	106	109	114	118	117
Is a place with wide-open landscapes								Strength			
Is a place where nature can be enjoyed in close proximity to cities	Strength				Strength	Weakness		Strength			
Is a place that embraces cultural diversity		Strength									
Is a place where the people are welcoming		Strength		Weakness				Strength		Weakness	Weakness
Is a place where the people are open-minded				Strength			Weakness	Weakness			
Is a place where the people embrace new ideas								Weakness			
Is a good place to live	Strength	Weakness					Weakness	Weakness			
Has a distinctive identity that can't be replicated by other destinations	Weakness						Strength	Strength	Weakness		Weakness

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), HVG Audience, Evaluated [DESTINATION]  
 C6. We are interested in your general impressions about destinations even if you have never been there. Please select all the destinations you think apply to the statement.  
 Select "None of these" if you think none of the destinations apply.



# Canada Strengths & Opportunities: Among HVG Audience

Being a must-visit spot and place to visit with friends also present the greatest opportunities among HVGs.





# Increasing Fall/Winter Visitation



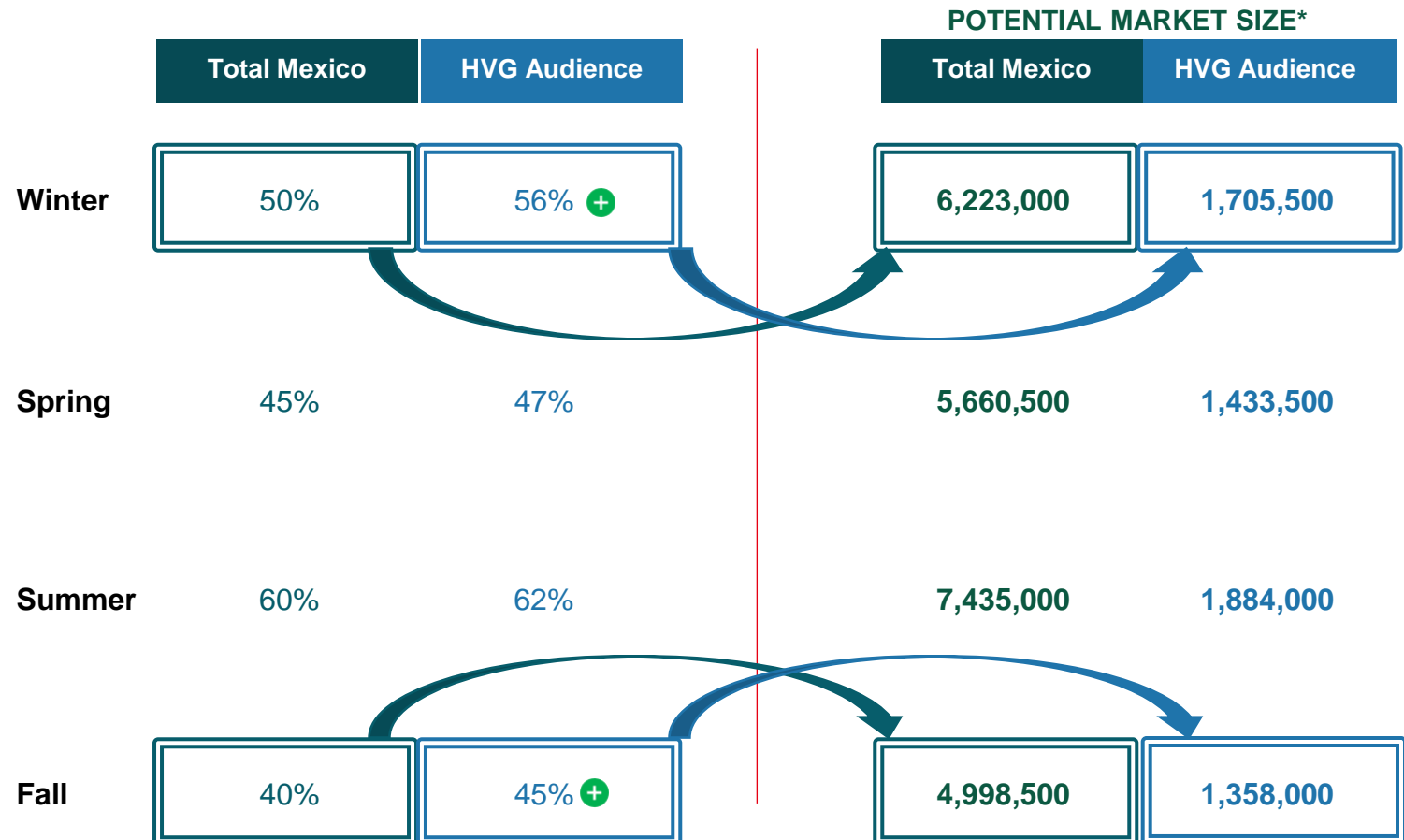
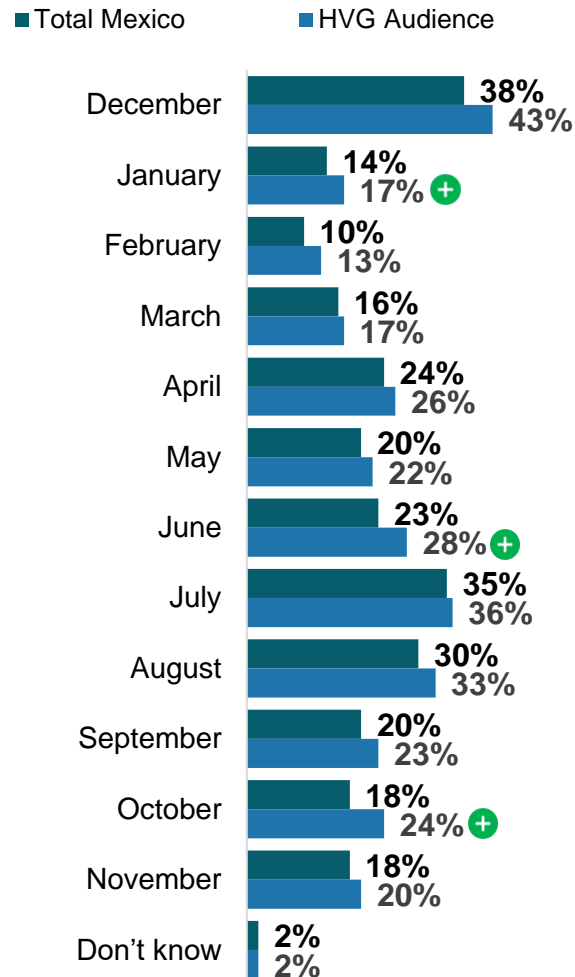
Aurora Borealis, Yellowknife  
Northwest Territories





# Demand by Season (Any Destination)

Travel demand is highest in the summer months for both Total Mexican Travellers and HVGs. Travel during the Winter months is next most common, with an opportunity size of ~6.2M potential visitors.



## TOTAL MEXICO

Increase in vacations being booked outside of school holidays  
 YouGov Global Travel Profiles (Mexico) – 2023 Base: Target regions (México D.F., Nuevo León & Jalisco) 18+

\* Calculation: Total potential Long-haul pleasure travellers aged 18 years or more (12,496,000) x total in Mexico typically travel during season

\* Calculation: Total potential HVG travellers (3,024,000) x total HVG typically travel during season

+ / - = significantly higher/lower result (vs. Total)



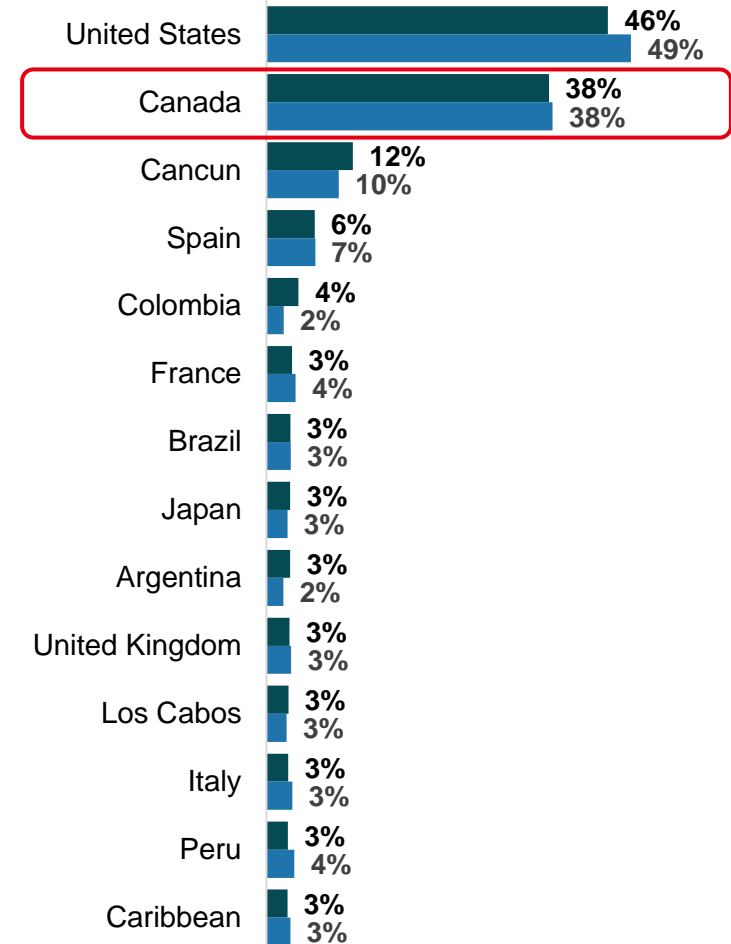
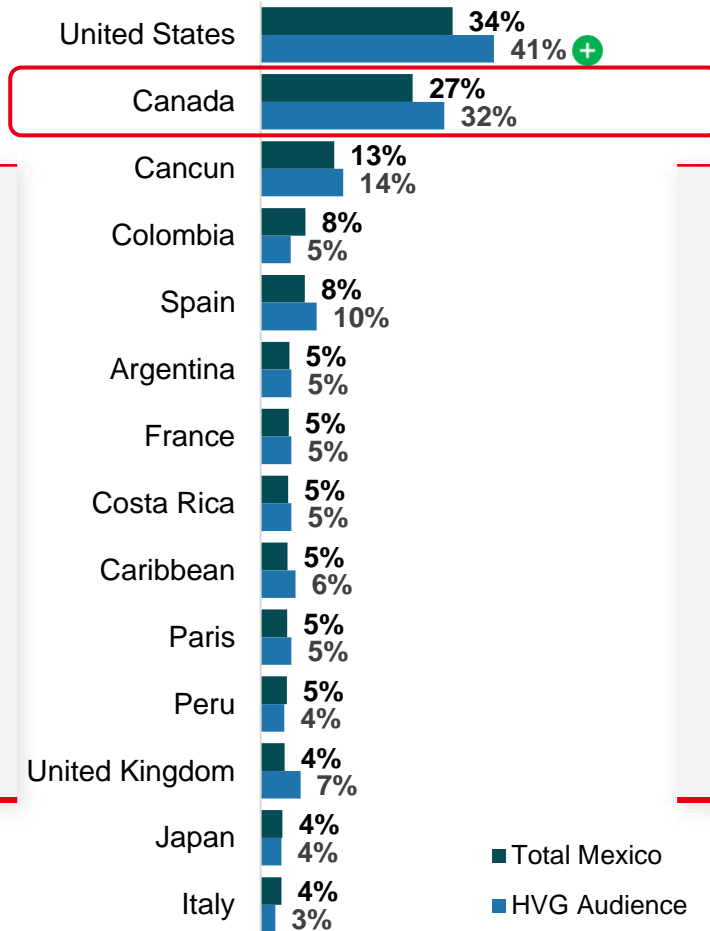
# Top of Mind Fall/Winter Destinations



Canada ranks second behind the United States for share of mind for Fall and Winter destinations.

## Fall

## Winter



### Autumn Season Description

Autumn is the season between summer and winter. Autumn tends to be a slower season after the busy summer in most destinations. In some destinations, the weather becomes cooler and the leaves on trees shift to red, orange and yellow in preparation to shed. While autumn has some distinct activities and experiences, many summer activities can still be done in autumn.

### Winter Season Description

Winter is a season that is typically characterized by colder temperatures. During the winter months there are usually festivals, snow sports and holiday activities. It may snow in some destinations, allowing for skiing, snowboarding, outdoor spas and other winter activities.

Note: respondents were asked either about winter travel (B2/D2) or autumn/fall travel (B3/D3)

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

B3. What destinations come to mind when thinking about travel to experience the **autumn season**? (Please list up to 3 destinations. You can mention destinations within or outside of Mexico and Central America.) Please note: You do not have to limit your responses to destinations you are considering for a holiday trip. (n=795); HVG (n=188)

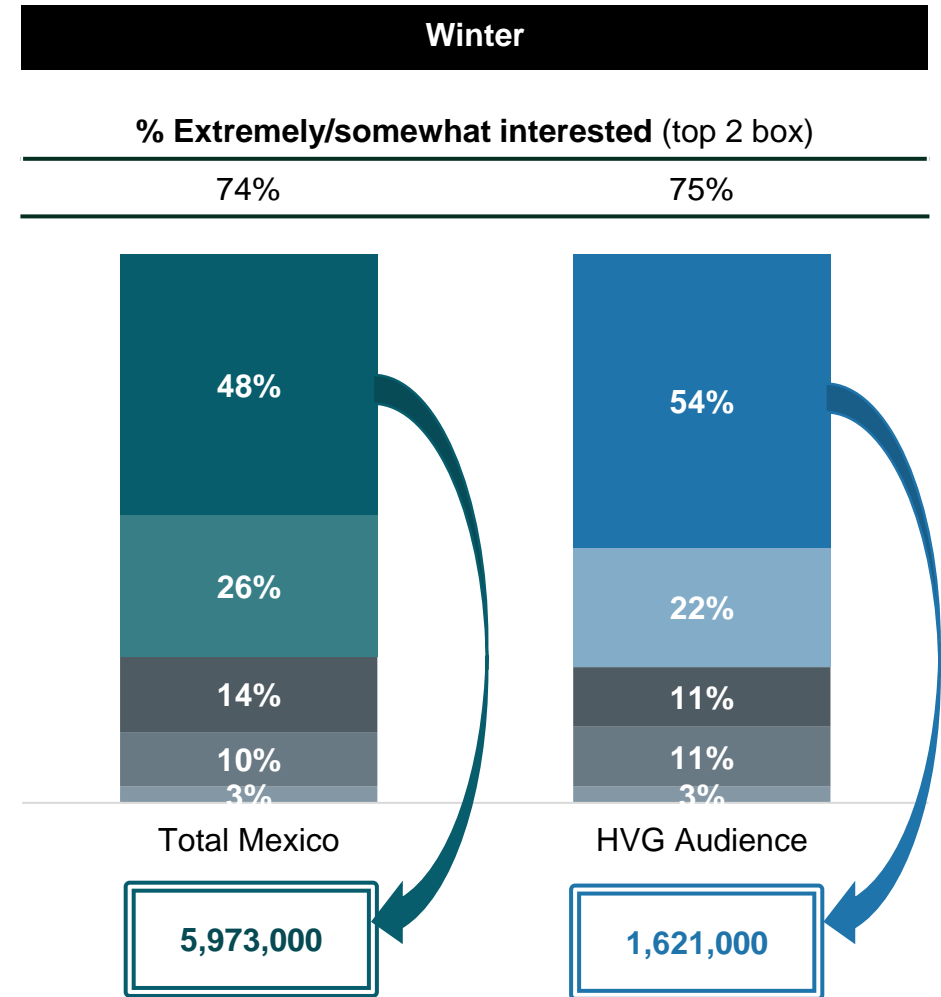
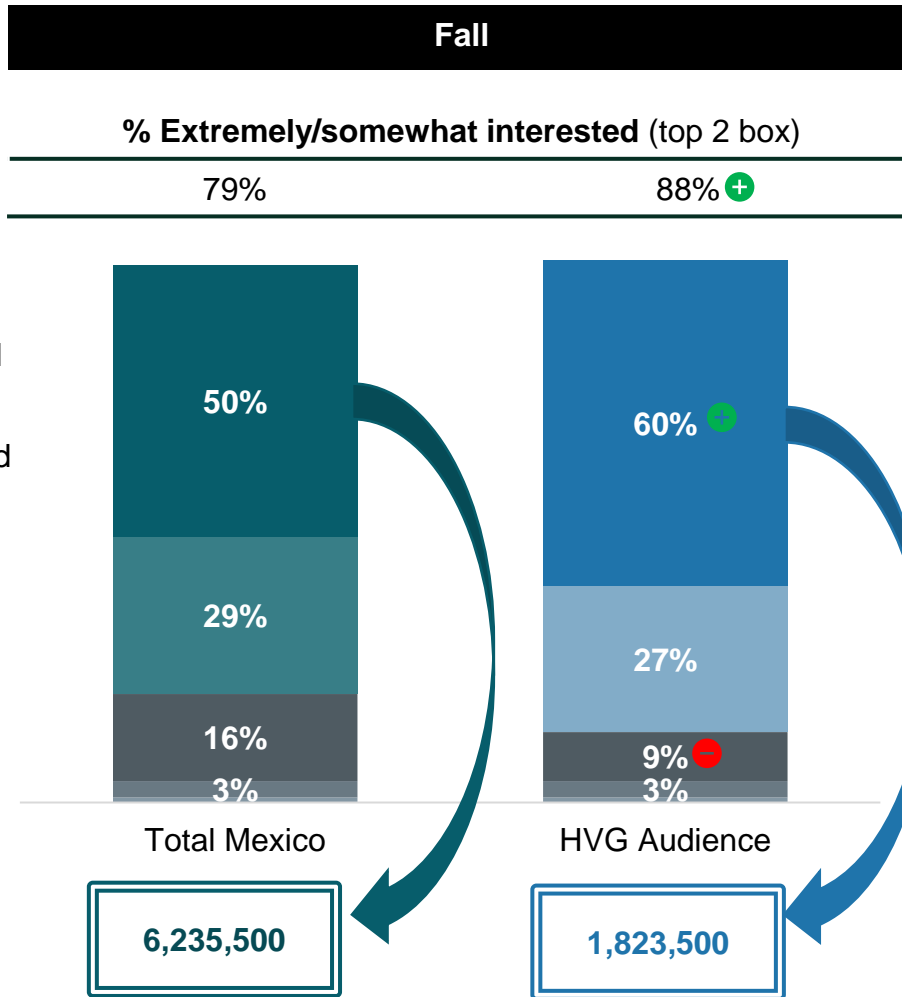
B2. What destinations come to mind when thinking about travel to experience the **winter season**? (Please list up to 3 destinations. You can mention destinations within or outside of Mexico and Central America.) Please note: You do not have to limit your responses to destinations you are considering for a holiday trip. (n=776); HVG (n=188)



# Interest in Fall/Winter Holidays



Interest in Fall and Winter holidays are comparable among total Mexican travellers. Of note, among HVGs there is greater desire for Fall travel. There are 6.2 million Mexican travellers who are extremely interested in taking a trip during a destination's Fall season. For Winter, 6.0 million are extremely interested in taking a trip during a destination's Winter season.



- Extremely interested
- Somewhat interested
- Neutral
- Not very interested
- Not at all interested

\* Calculation: Total potential Long-haul pleasure travellers aged 18 years or more (12,496,000) x total in Mexico extremely interested in season

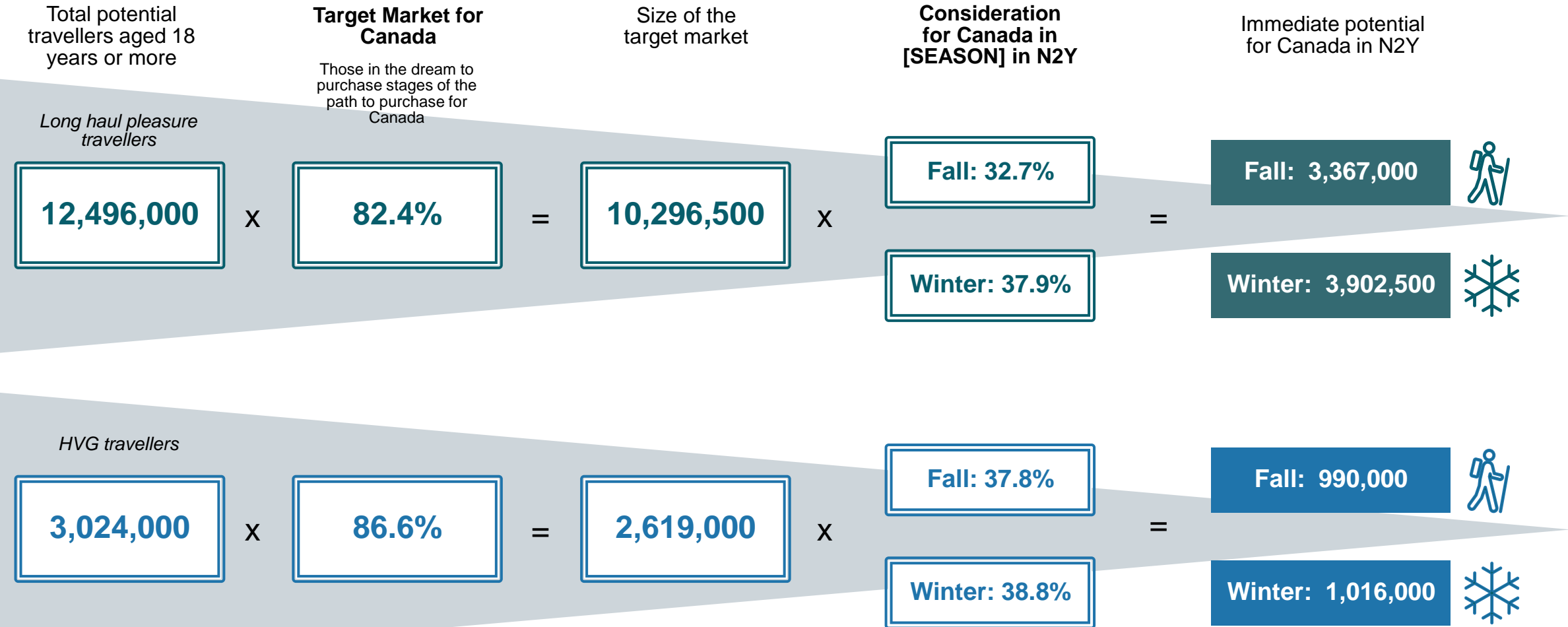
\* Calculation: Total potential HVG travellers (3,024,000) x total HVG extremely interested in season

36 Note: respondents were asked either about winter travel (B2/D2) or autumn/fall travel (B3/D3)  
 Base: Long-haul pleasure travellers (past 3 years or next 2 years)  
 D3. In general, how interested are you in taking a holiday trip to a destination during **its autumn season?** (n=795); HVG (n=188)  
 D2. In general, how interested are you in taking a holiday trip to a destination during **its winter season?** (n=776); HVG (n=188)



# Potential Market Size For Canada in Fall/Winter

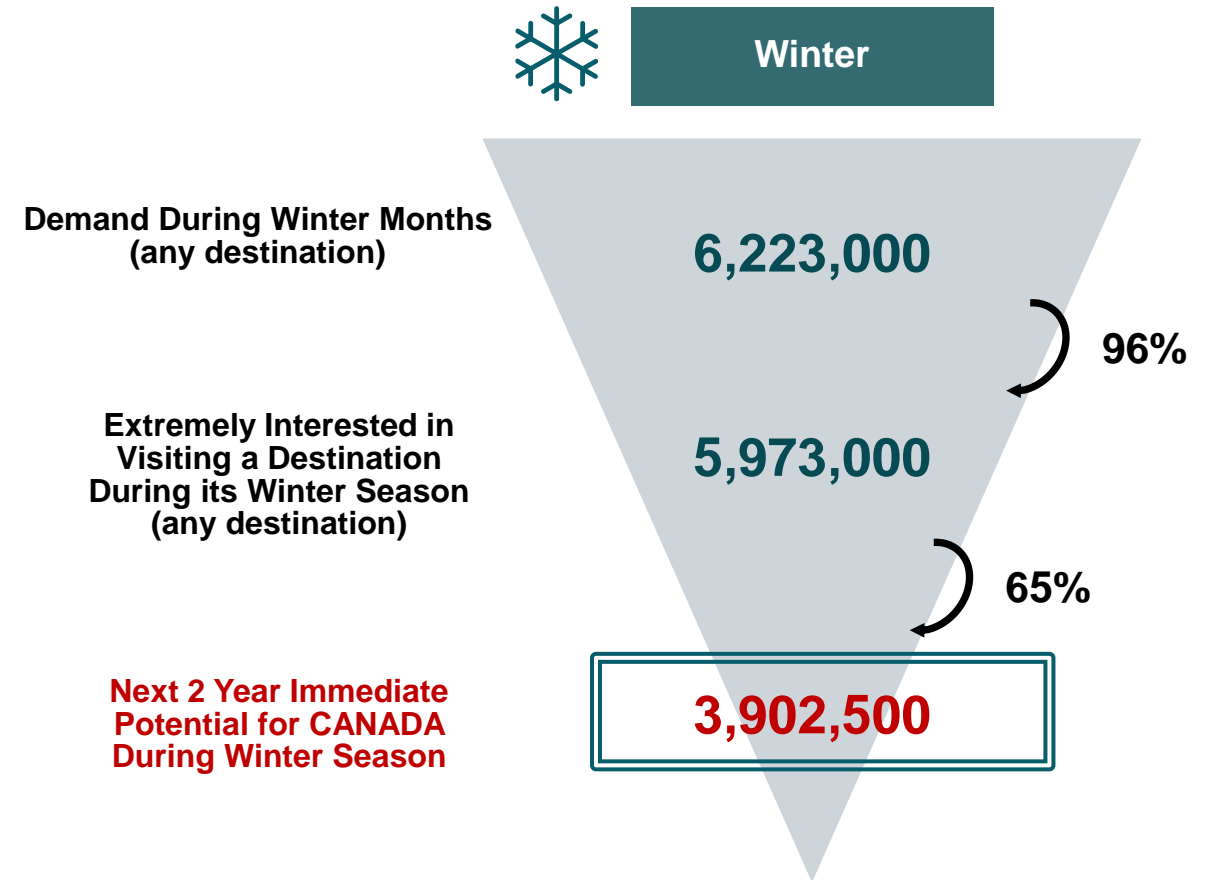
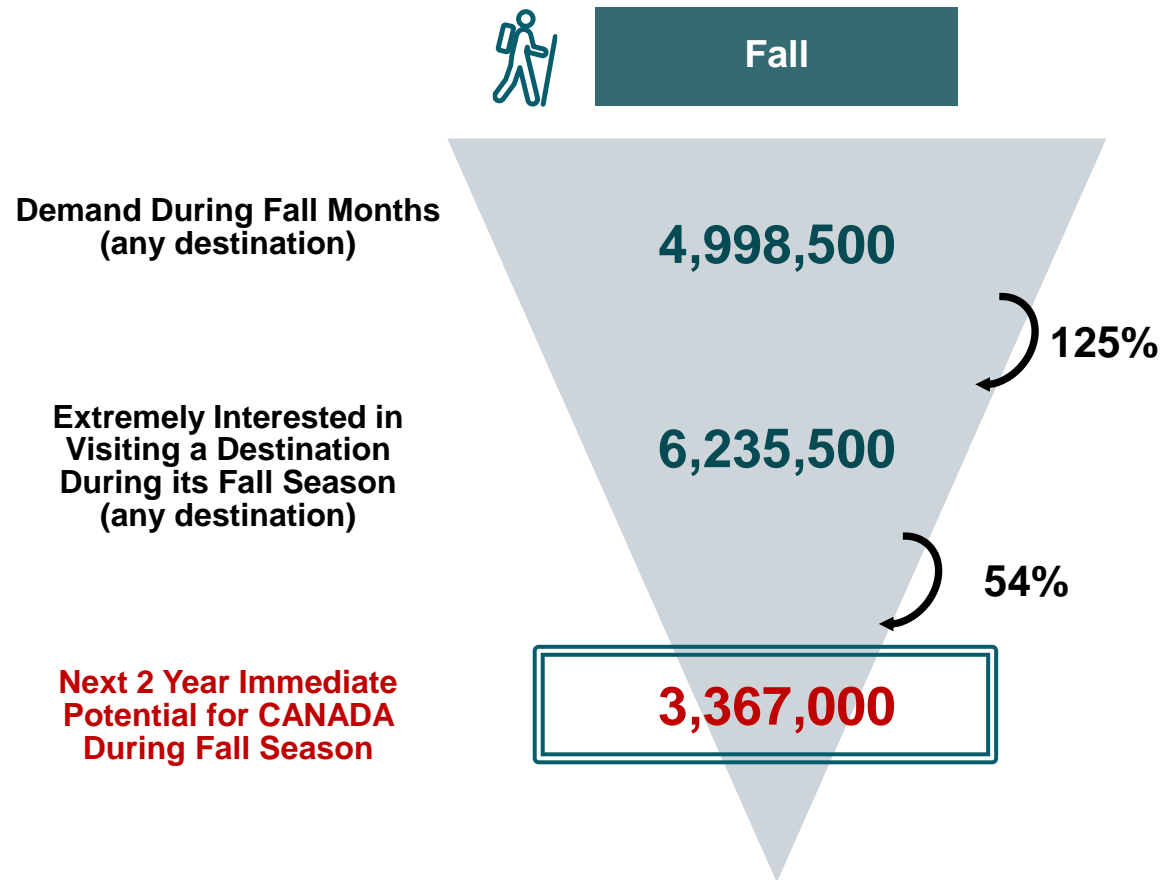
Consistent with travel demand by month among Mexican travellers, there is slightly greater potential for travel to Canada during the Winter months.



# Fall/Winter Conversion – Total Mexico



*Encouragingly, interest in taking a trip during a destination’s Fall season exceeds that of typical travel during Fall months. Furthermore, interest in taking a trip during a destination’s Winter season almost equal that of travel during Winter months. However, potential for Canada to convert those who are interested in travel for each season is moderate.*



Base: Long-haul pleasure travellers (past 3 years or next 2 years)  
 D1. In general, what time of year do you typically like to take holiday trips? Select all that apply Total (n=1571)  
 D3. In general, how interested are you in taking a holiday trip to a destination during its autumn season? Total (n=795)  
 D2. In general, how interested are you in taking a holiday trip to a destination during its winter season? Total (n=776)  
 C7. For each of the following destinations, during which months would you consider taking a holiday trip in the next 2 years? Total (n=1311)

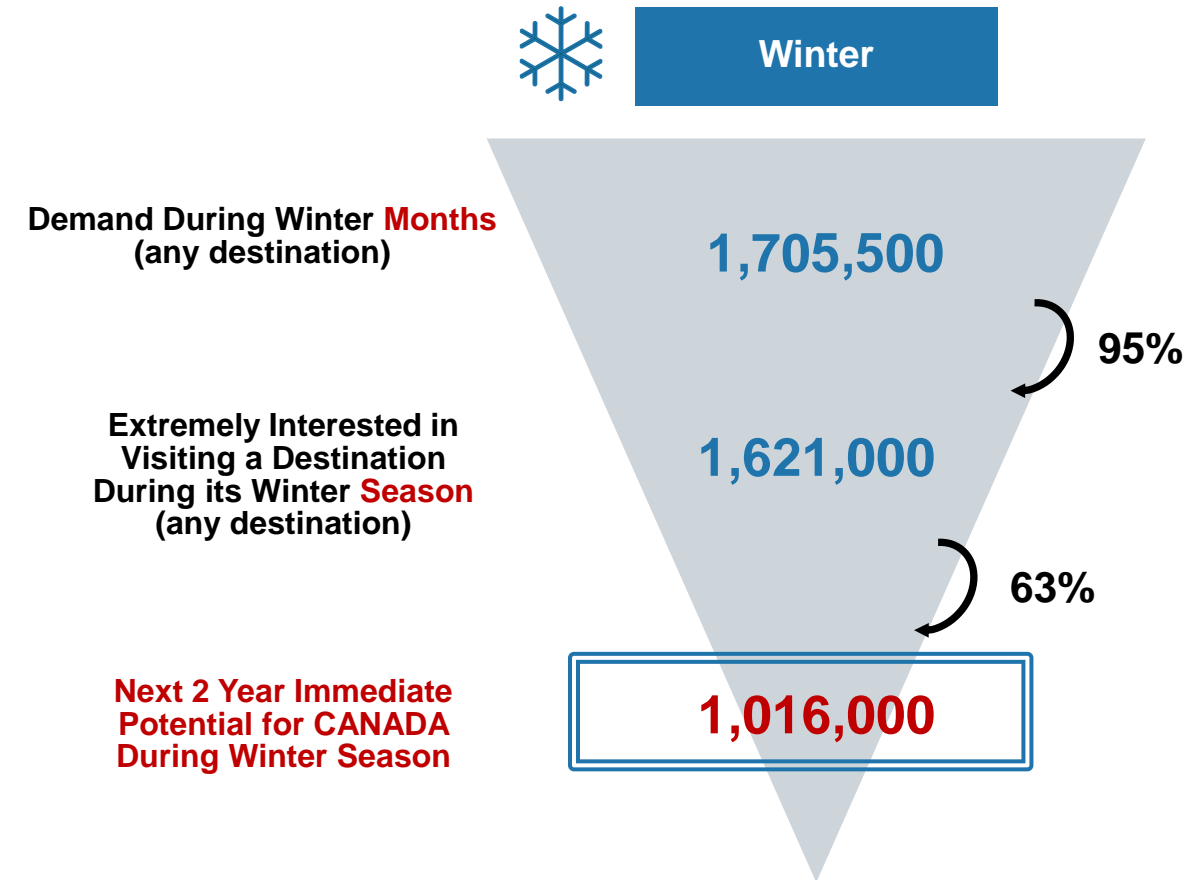
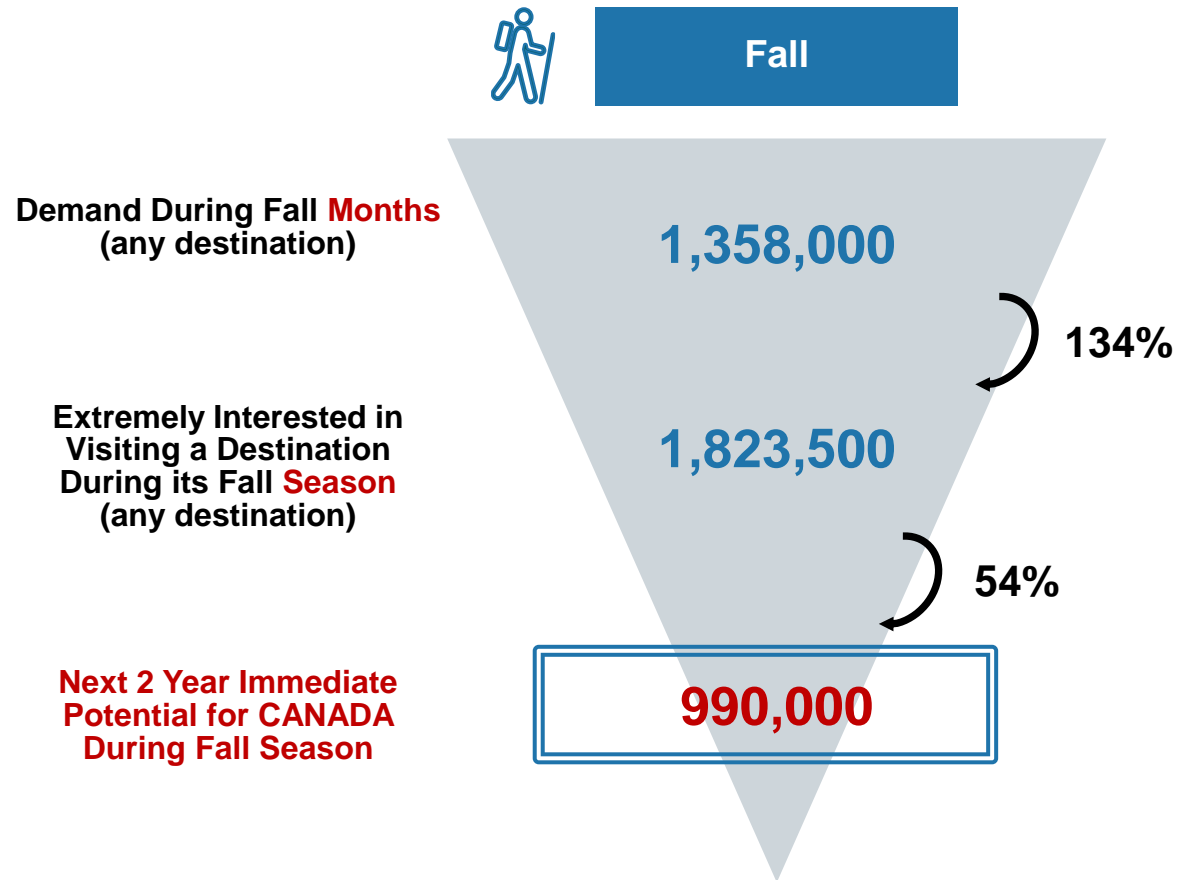




# Fall/Winter Conversion – Among HVG Audience



Similarly to total Mexican travellers, interest in taking a trip during a destination's Fall season exceeds that of typical travel during Fall months. As well, interest in taking a trip during a destination's Winter season almost equal that of travel during Winter months. Potential for Canada to convert those who are interested in travel for each season is moderate among the HVG audience.



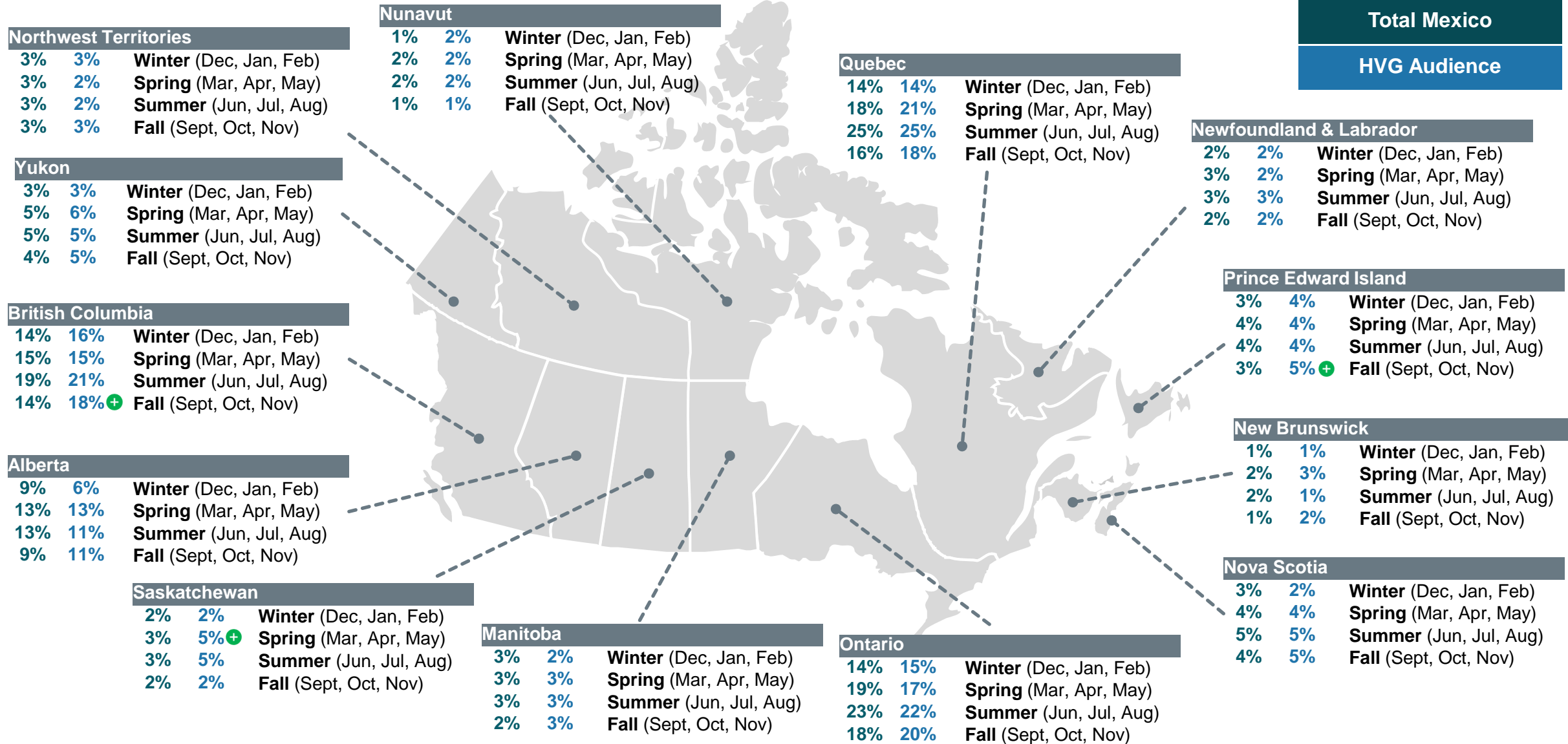
Base: Long-haul pleasure travellers (past 3 years or next 2 years), HVG Audience  
 D1. In general, what time of year do you typically like to take holiday trips? Select all that apply HVG (n=376)  
 D3. In general, how interested are you in taking a holiday trip to a destination during its autumn season? HVG (n=188)  
 D2. In general, how interested are you in taking a holiday trip to a destination during its winter season? HVG (n=188)  
 C7. For each of the following destinations, during which months would you consider taking a holiday trip in the next 2 years? HVG (n=332)



# Time of Year Interested in Visiting Canada (Next 2 Years)



The main provinces that Mexican travellers would visit are British Columbia, Ontario and Quebec, true across all seasons.

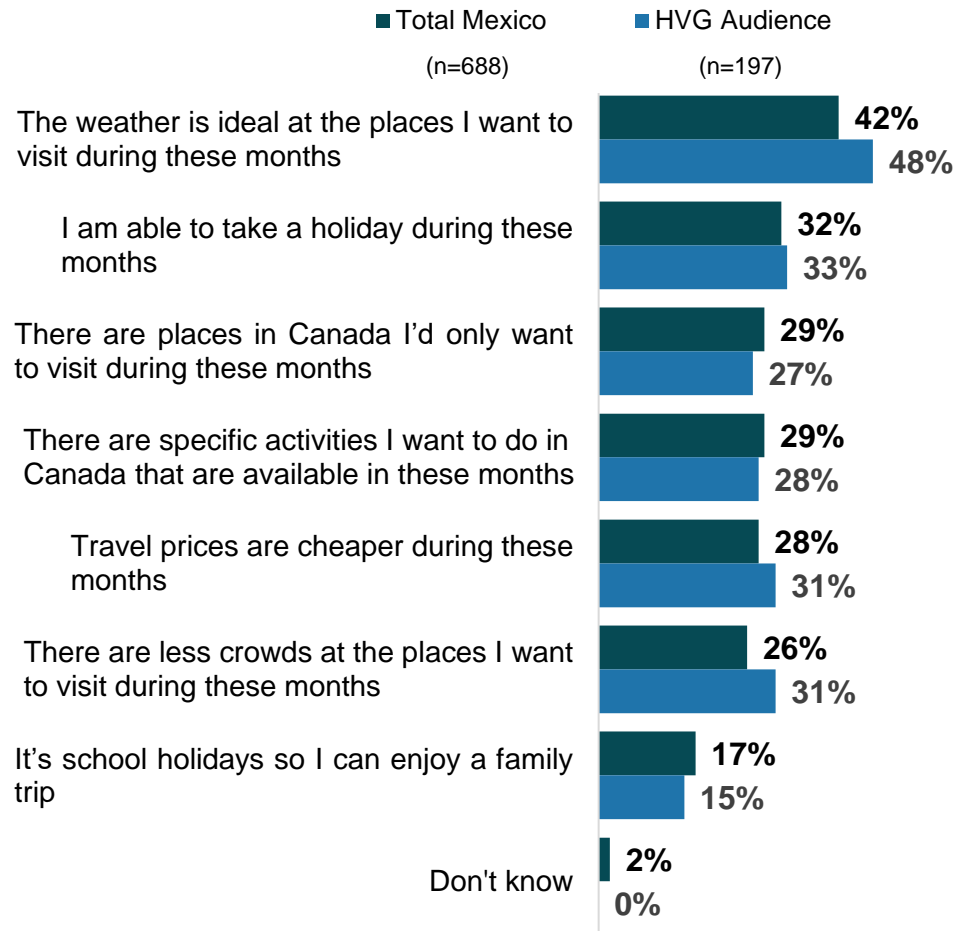


# Motivators & Barriers for Fall Travel to Canada



While some travellers find Canadian weather to be a hindrance when travelling, others are motivated by the Canadian Fall weather; more than a quarter of travellers have places in Canada that they'd only want to go in the Fall.

## Motivators for Fall Travel



## Barriers for Fall Travel



Base: Those in the dream to purchase stages of the path to purchase for Canada and considering visiting Canada or any province/territory in September, October or November E6a. You indicated earlier that you are considering taking a holiday to **Canada** during the months of September, October and/or November... Which of the following describes why you would be interested in travelling to Canada for a holiday during these **autumn months**?

Base: Those in the dream to purchase stages of the path to purchase for Canada and not considering visiting Canada or any province/territory in September, October or November E7. You indicated earlier that you are not considering taking a holiday to **Canada** during the months of September, October and/or November... Which of the following describes why you would **not** be interested in travelling to Canada for a holiday during these **autumn months**?

Mexico GTRP – December 2023

+ / - = significantly higher/lower result (vs. Total)

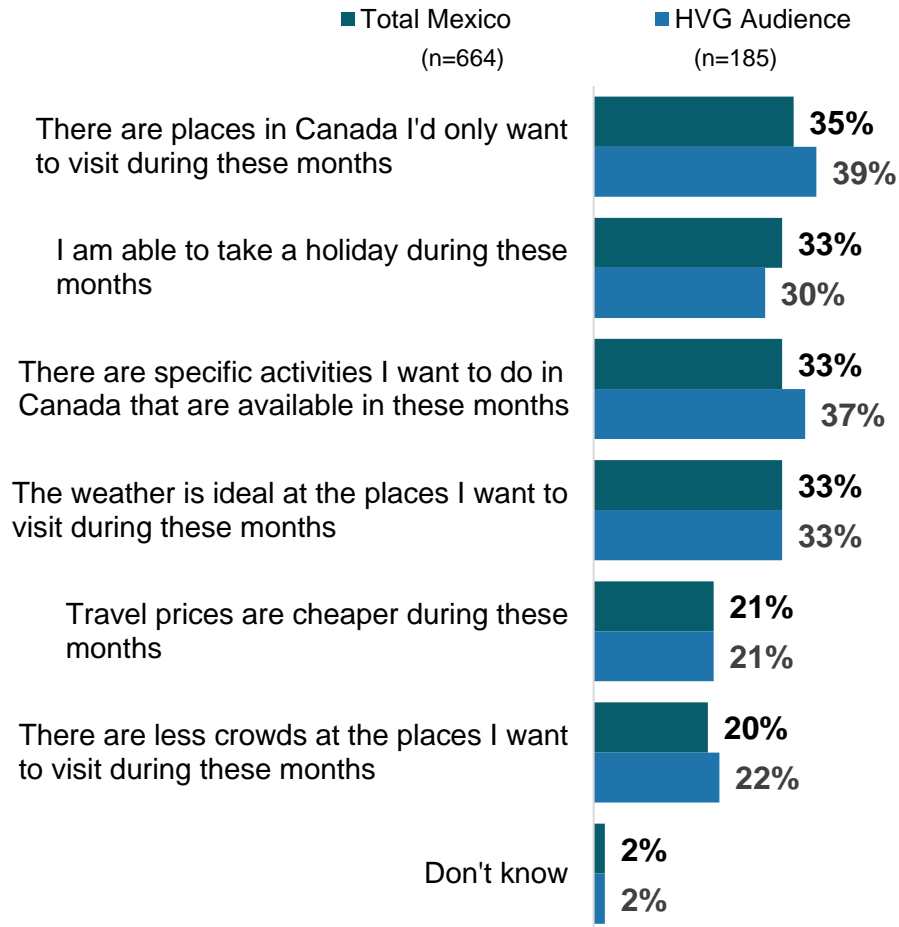


# Motivators & Barriers for Winter Travel to Canada

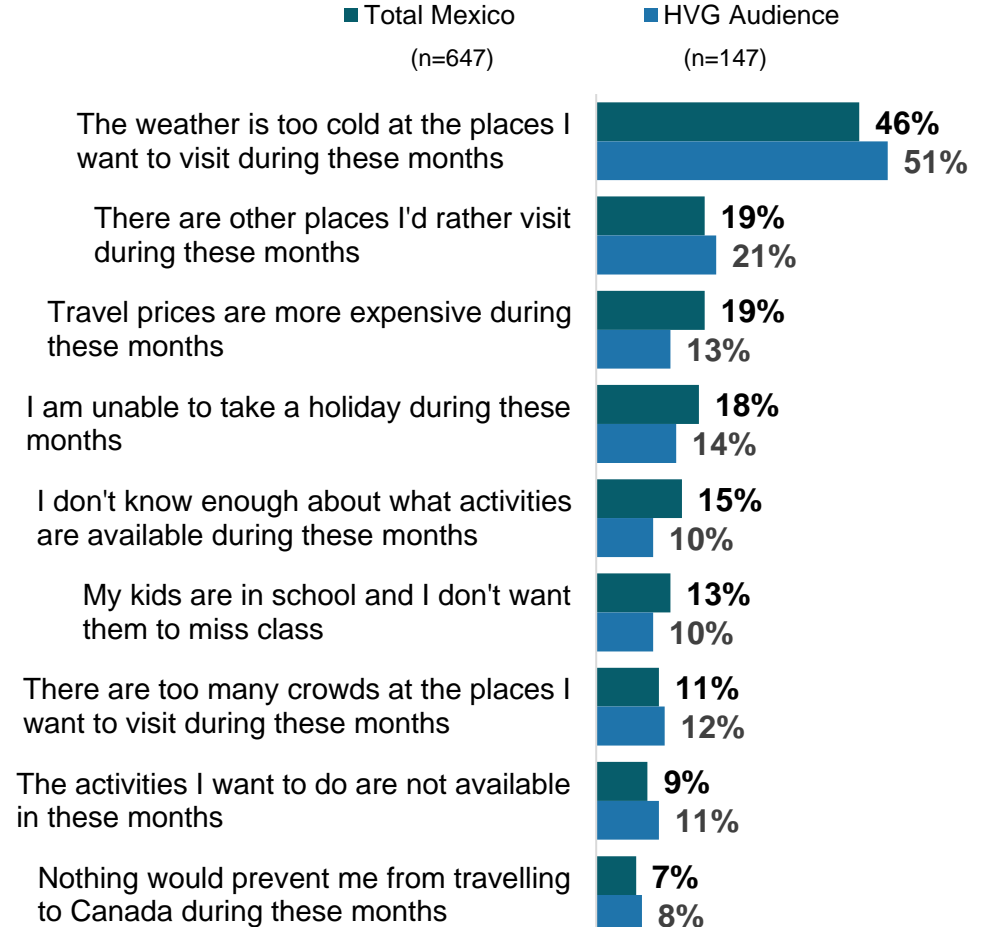


*In the Winter, almost half of those who consider travelling to Canada view the weather as a deterrent while one third have specific activities they'd want to do in Canada during these months.*

## Motivators for Winter Travel



## Barriers for Winter Travel



Base: Those in the dream to purchase stages of the path to purchase for Canada and considering visiting Canada or any province/territory in December, January or February E8a. You indicated earlier that you are considering taking a holiday to **Canada** during the months of December, January and/or February... Which of the following describes why you would be interested in travelling to Canada for a holiday during these **winter months**?

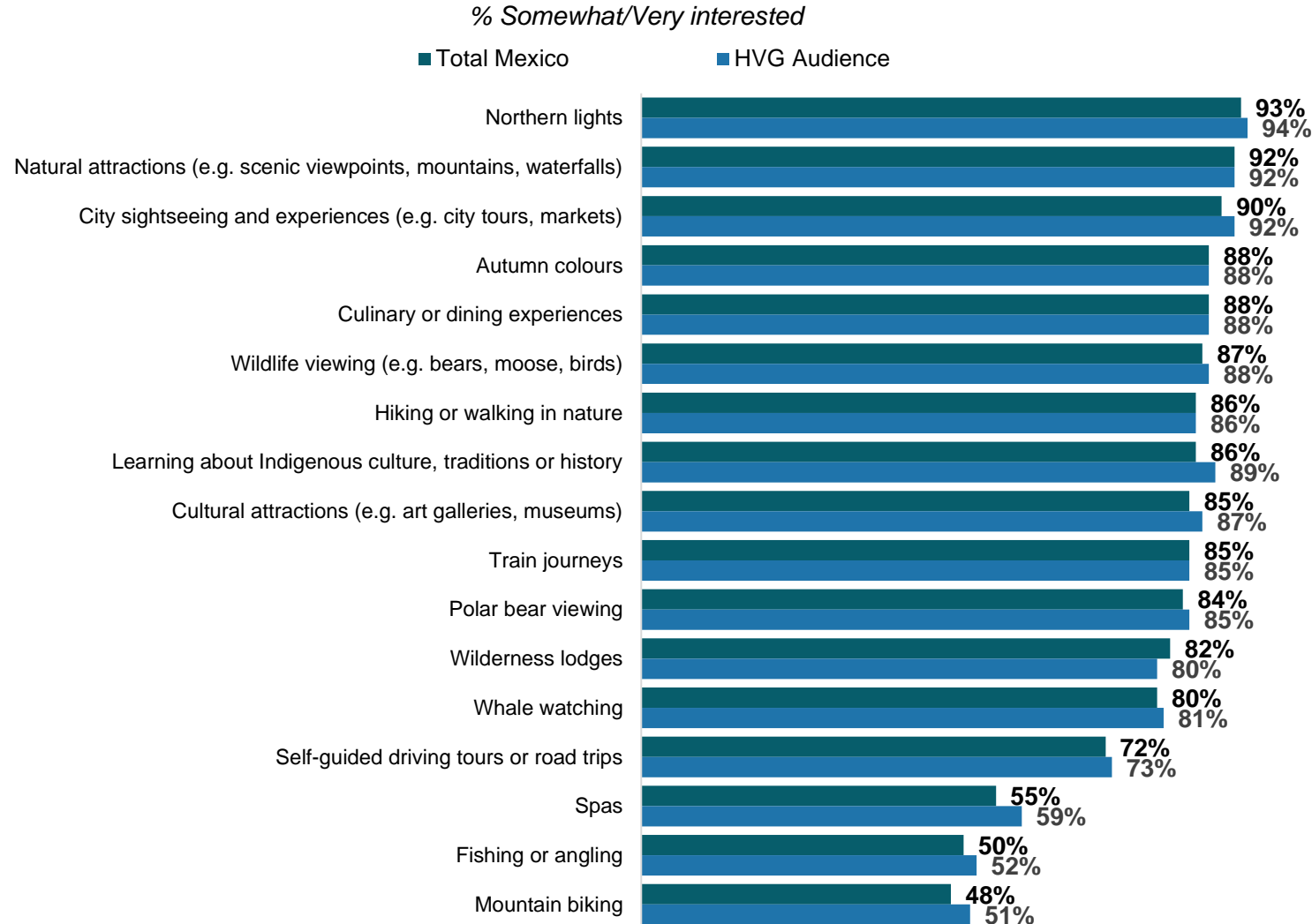
Base: Those in the dream to purchase stages of the path to purchase for Canada and not considering visiting Canada or any province/territory in December, January or February E9. You indicated earlier that you are not considering taking a holiday to **Canada** during the months of December, January and/or February... Which of the following describes why you would **not** be interested in travelling to Canada for a holiday during these **winter months**?

+ / - = significantly higher/lower result (vs. Total)



# Interest in Fall Activities in Canada

*The Northern lights, natural attractions, and city sightseeing are the top experiences Mexican travellers are interested in during a Fall trip to Canada.*

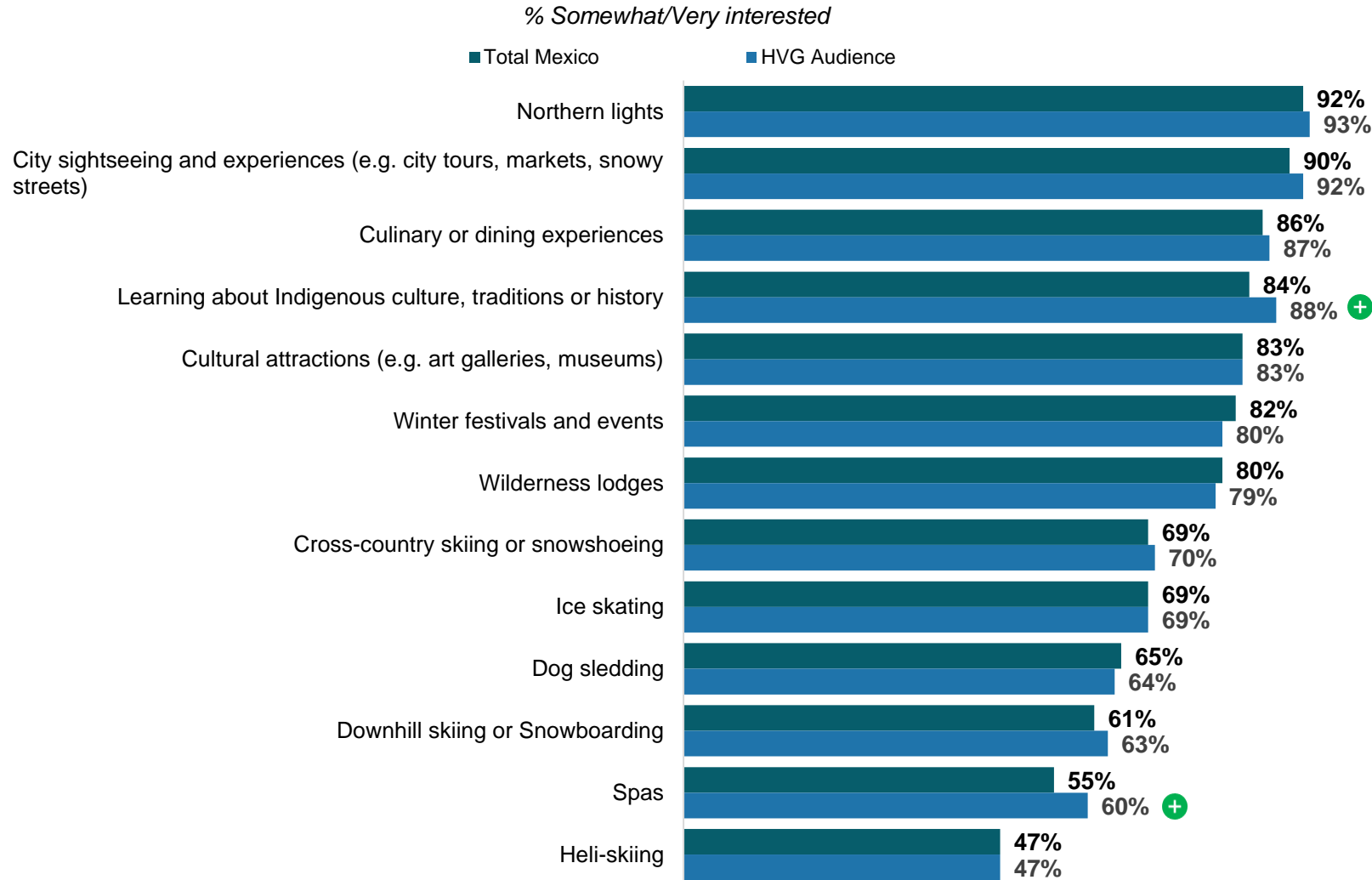




# Interest in Winter Activities in Canada



*In the Winter, the Northern Lights, city sightseeing, and culinary experiences are of greatest interest for travellers to Canada.*





# Sustainability

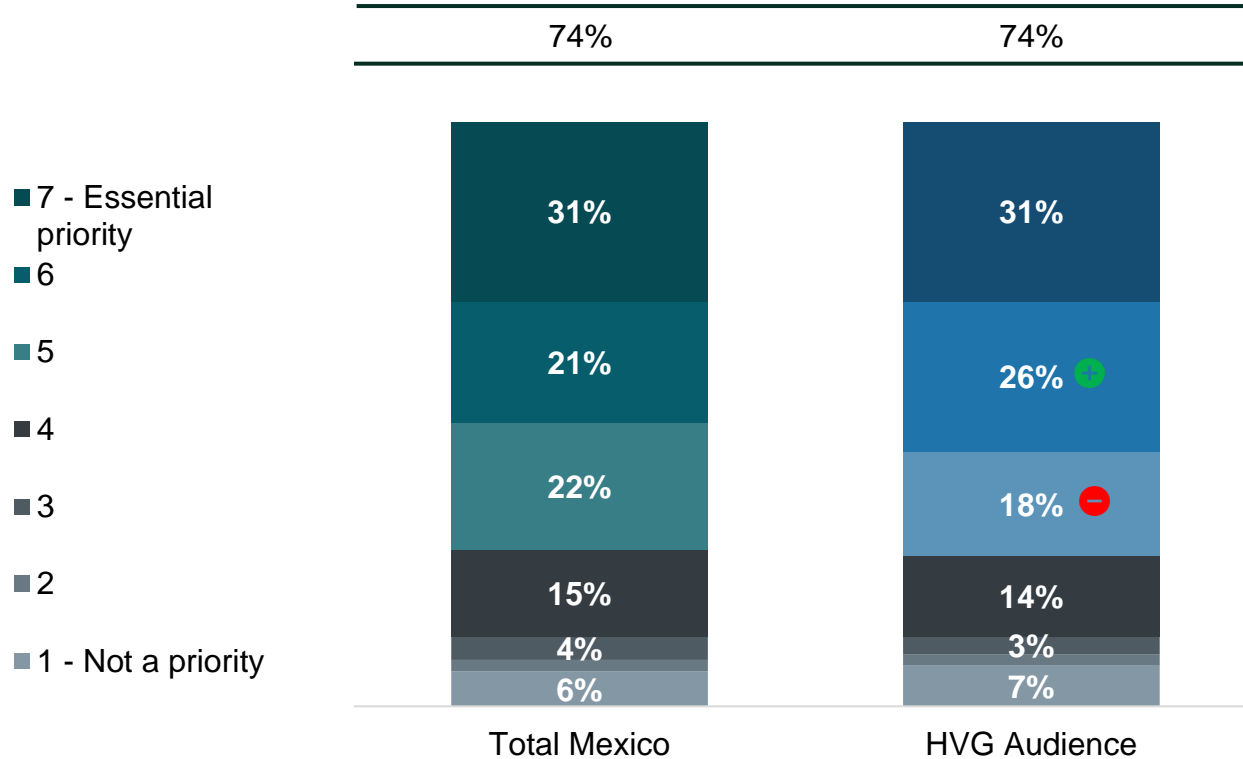


# Priority of Sustainable Travel When Planning a Trip



**Sustainable travel is important to three quarters of Mexican travellers. Canada is more likely than top competitors the US and Spain to be perceived as a socially responsible and environmentally-friendly travel destination.**

% Score 5 to 7 (out of 7)



% Associate [DESTINATION] with...	Is a socially responsible travel destination		Is an environmentally-friendly travel destination	
	Total Mexico	HVG	Total Mexico	HVG
<b>Canada</b>	<b>61%</b>	<b>67% (+)</b>	<b>63%</b>	<b>66%</b>
<b>United States</b>	<b>37%</b>	<b>44%</b>	<b>30%</b>	<b>32%</b>
<b>Spain</b>	<b>34%</b>	<b>35%</b>	<b>25%</b>	<b>34% (+)</b>

## Sustainable Travel Description

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”.

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1571); HVG (n=376)

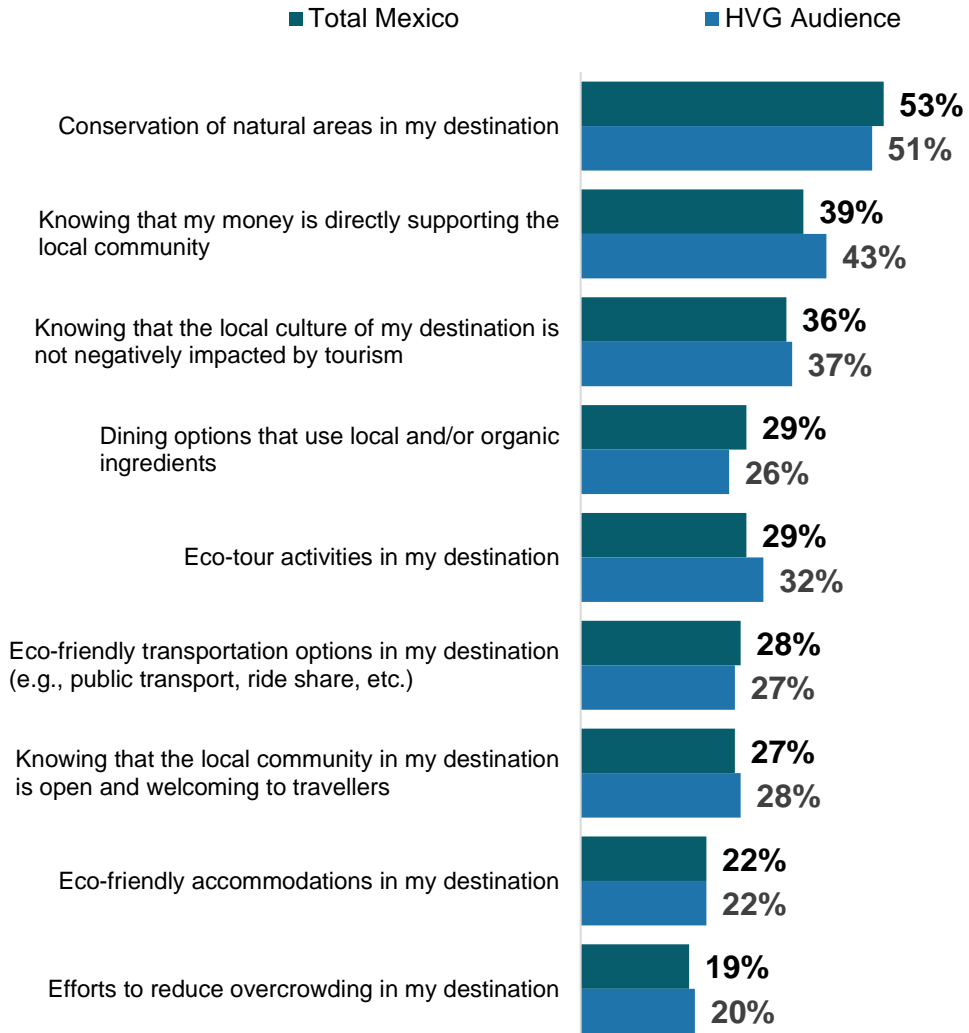
D7. [DESCRIPTION] How much of a priority is sustainable travel to you when you are planning a trip? Please use a 7-point scale, where 7 means 'essential priority' and 1 means 'not a priority'.

C6. We are interested in your general impressions about destinations even if you have never been there. Please select all the destinations you think apply to the statement. Select "None of these" if you think none of the destinations apply.



# Top 3 Most Important Sustainability Efforts

*The most important sustainability efforts to Mexican travellers are the conservation of natural areas, that money spent is supporting the local community and that the destination's culture doesn't get negatively impacted by tourism.*

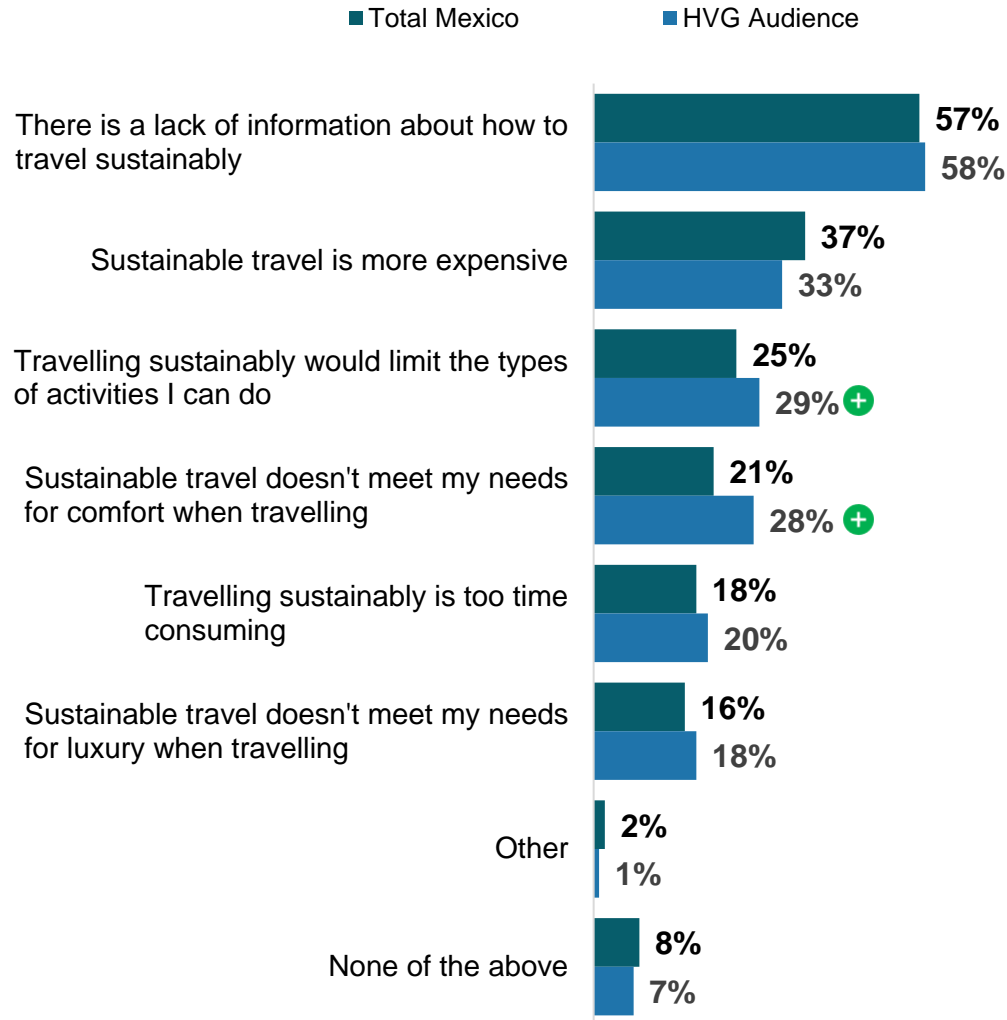


## Sustainable Travel Description

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”.

# Barriers to Sustainable Travel

**More than half of Mexican travellers feel that there is a lack of information on how to travel sustainably.**



## Sustainable Travel Description

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”.





# Indigenous Tourism

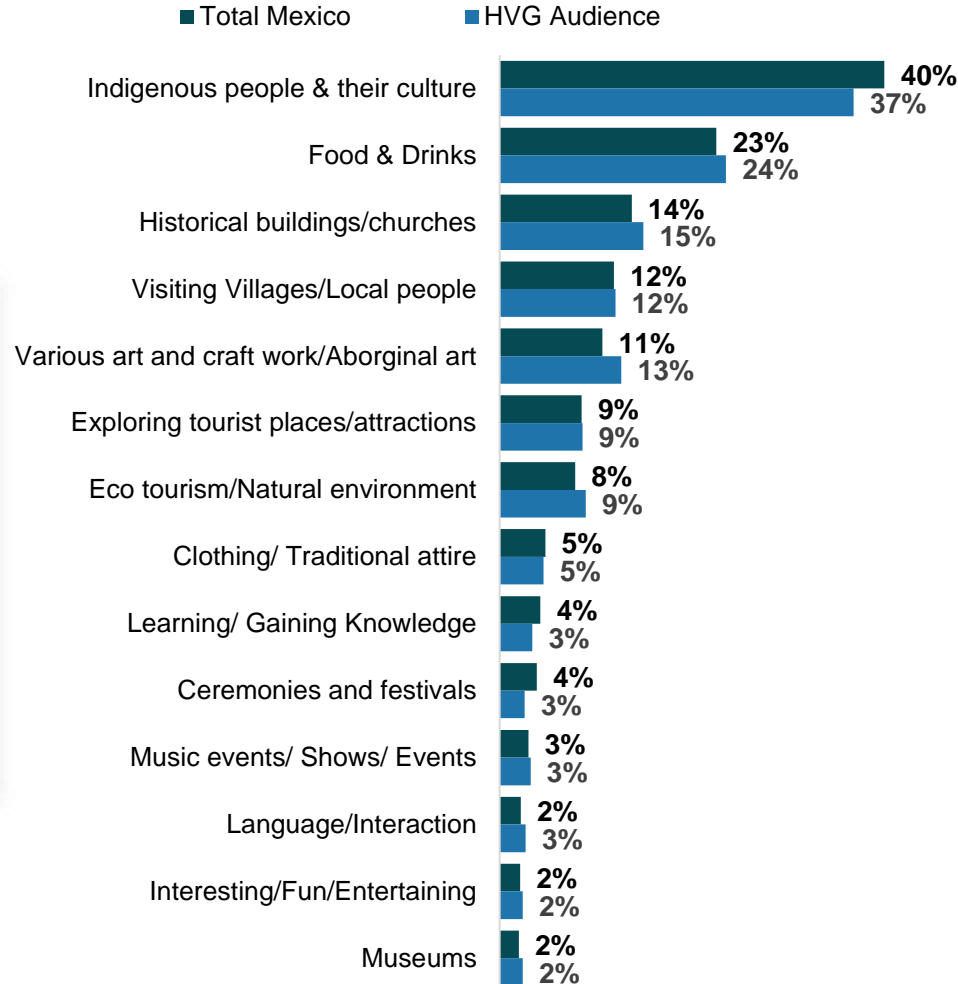


# Unaided Mentions – Indigenous Cultural & Tourism Activities

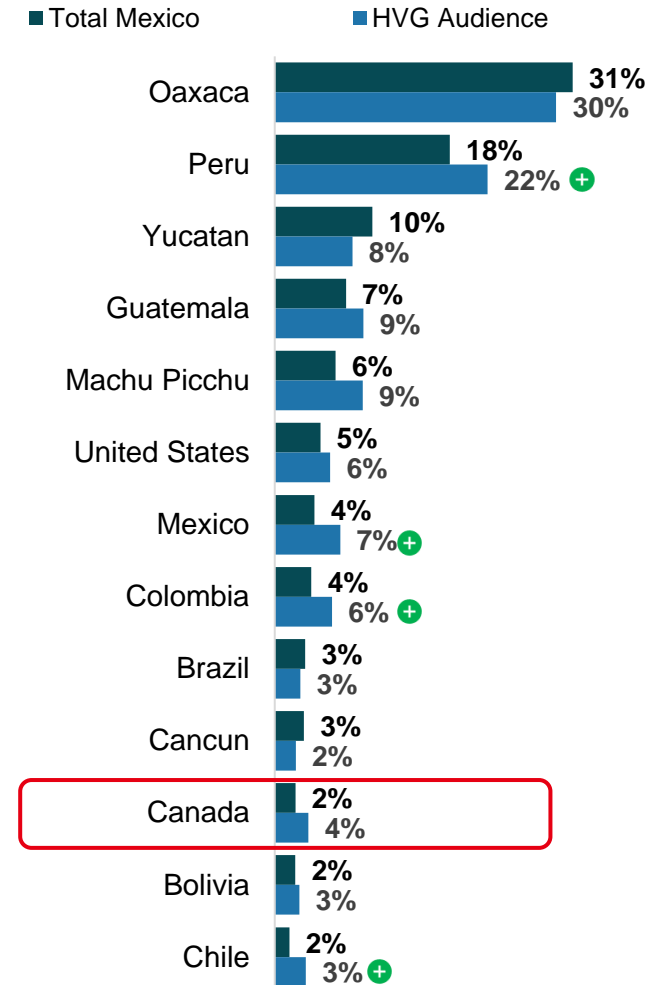


The culture, food and historical buildings are the top activities that come to mind when it comes to Indigenous tourism. However, Canada is not considered a top destination for Indigenous tourism; Oaxaca and Peru are the most mentioned.

## Activities



## Tourism Destinations



### Indigenous Peoples Description

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.





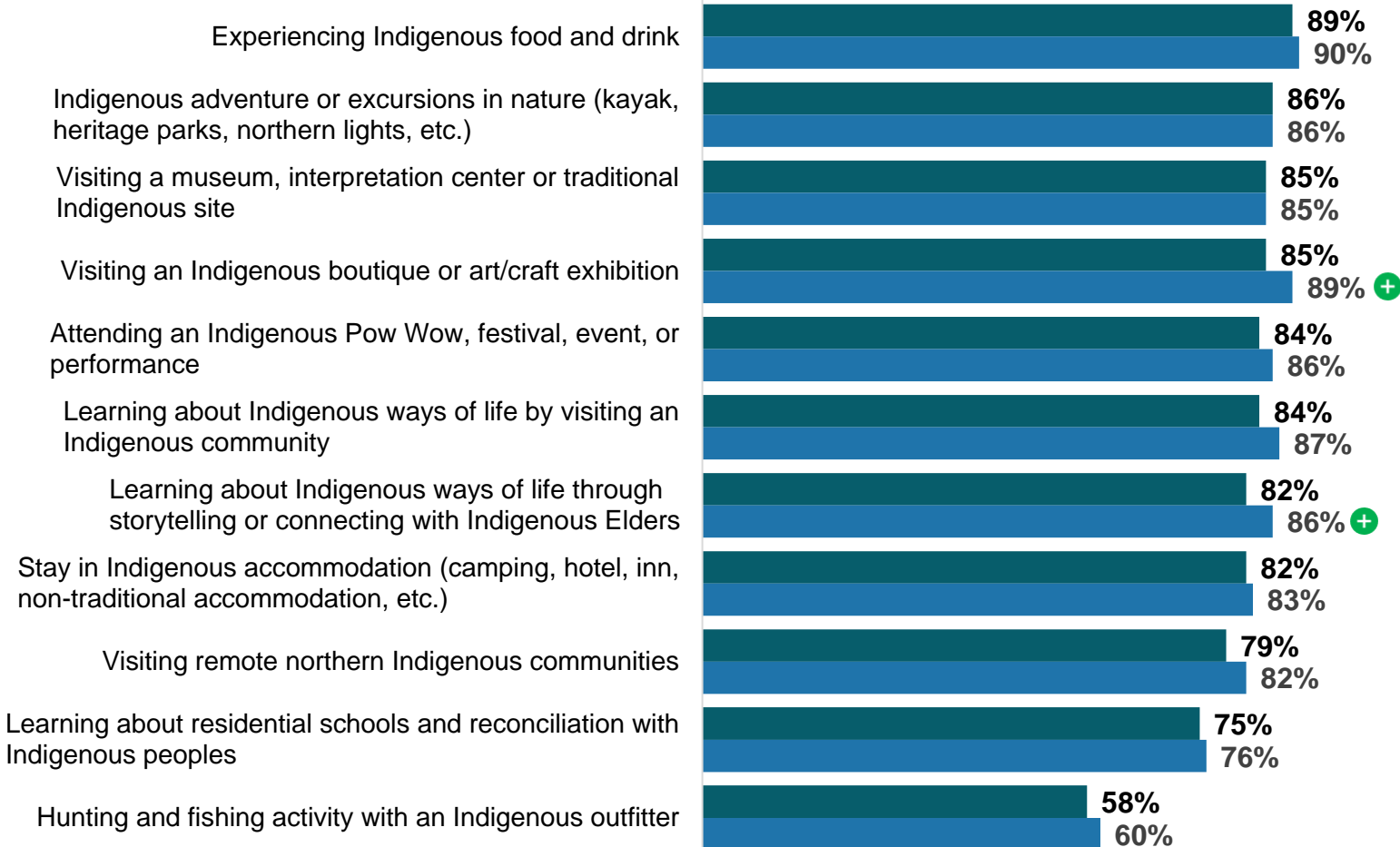
# Interest in Indigenous Cultural & Tourism Activities

*Interest is high across a wide range of experiences, including food and drink, excursions in nature, visiting museums/traditional sites, and boutiques or art/craft exhibitions, and learning about Indigenous ways of life.*

% Somewhat/Very interested

■ Total Mexico

■ HVG Audience



## 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.

# THANK YOU

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



CANADIAN TOURISM DATA  
**collective**