

CONFIDENTIAL

2023 GLOBAL TRAVELLER RESEARCH PROGRAM

TOPLINE REPORT

TOTAL MEXICO VS. HIGH VALUE GUEST AUDIENCE



CANADIAN TOURISM DATA
collective

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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 11th – 24th 2023



**Geographical Definition
for Qualified Trips**

**Outside of: Mexico and
Central America**



Sample Distribution

Sample distribution:	National
High Value Guest (HVG) Audience:	376
Other travellers:	1195
Total sample size:	1571

- 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.





Market Sizing



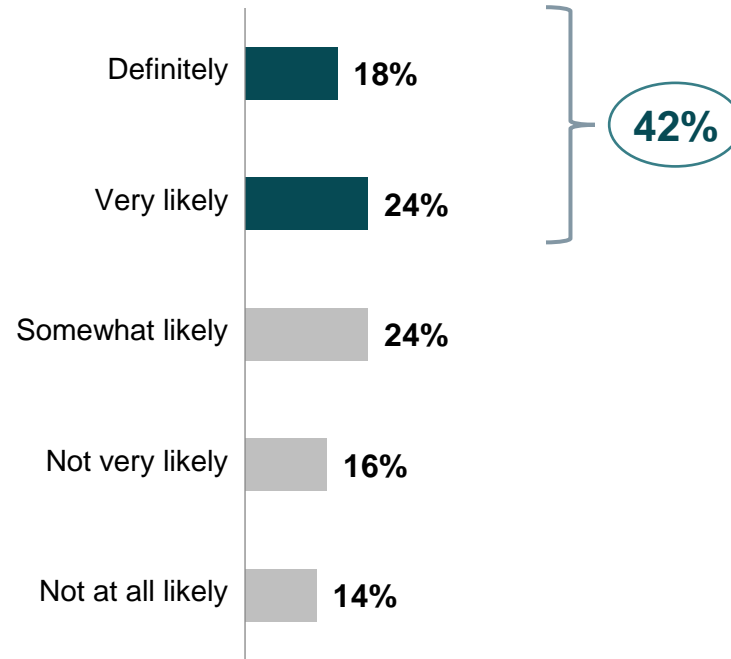
Yellowknife
Northwest Territories



Incidence of Long-Haul Pleasure Travel (General Population within 3 target cities*)



Plan to Take Long-Haul Pleasure Trip in Next 2 Years



Incidence Rate

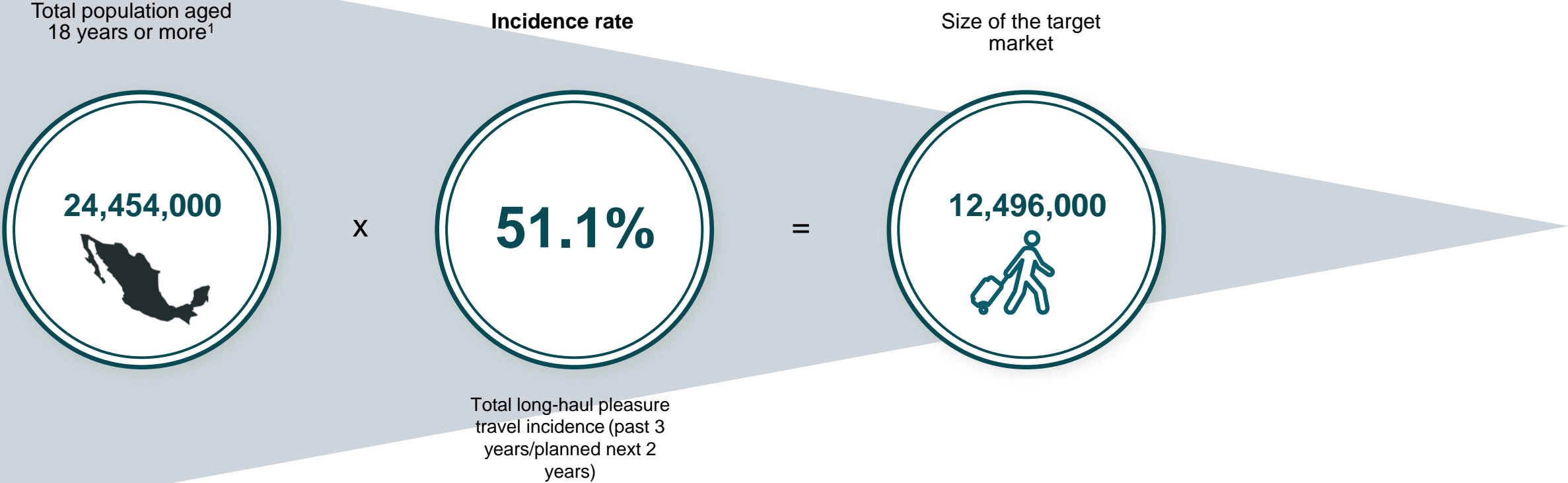


Total long-haul pleasure travel incidence (past 3 years/planned next 2 years)

5 * 3 target cities = Mexico City, Monterrey, Guadalajara
[^] Long-haul = outside of Mexico and Central America
 Note: Results are from 2023 YouGov Canada Omnibus Survey
 Base: General population aged 18+, among 3 target cities (n=659)



Long-Haul Pleasure Traveller Sizing

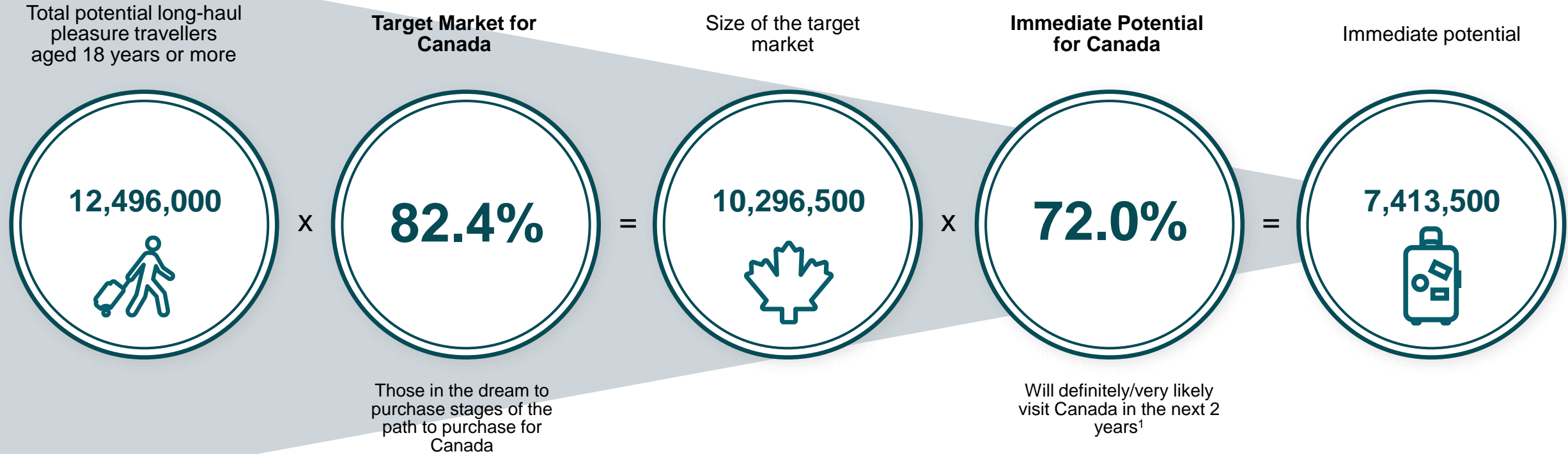


6 ¹ Source: Estimates 2020 Census, Mexico National Institute of Statistics and Geography
Note: Results are from 2023 YouGov Canada Omnibus Survey
Base: General population aged 18+, among 3 target cities (n=659)



Potential Market Size For Canada

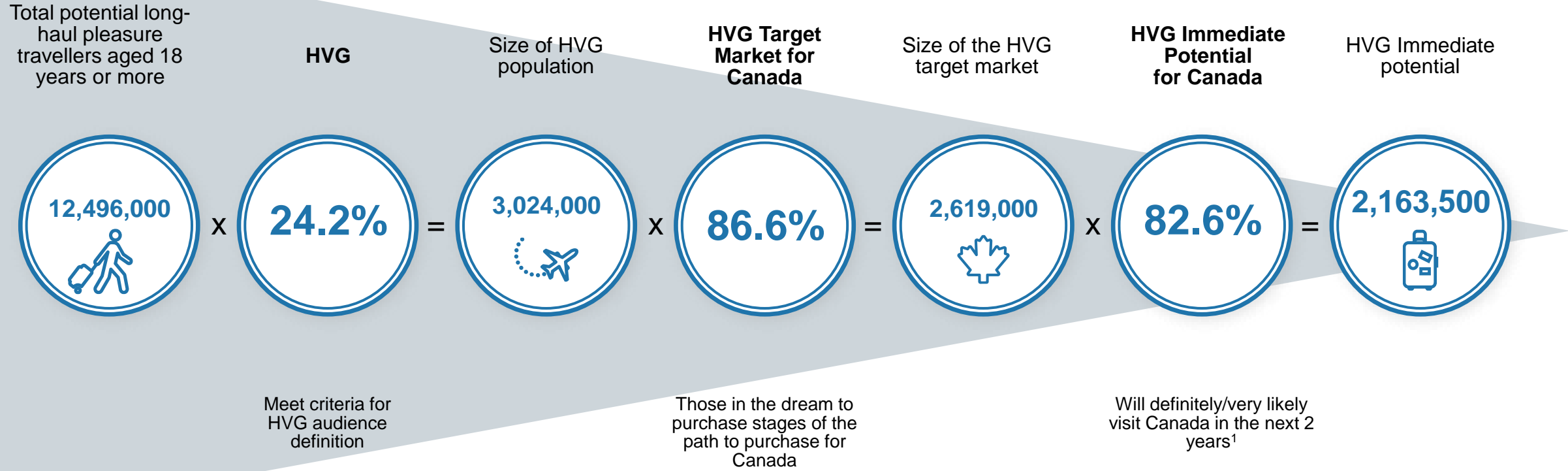
Size of the Potential Market to Canada (Next 2 Years)



7 ¹ Includes respondents likely to visit Canada for a trip of 1 to 3 nights, or a trip of 4 nights or more.
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)
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)

Potential Market Size For Canada

Size of the Potential Market to Canada (Next 2 Years): *HVG Audience*



¹ Includes respondents likely to visit Canada for a trip of 1 to 3 nights, or a trip of 4 nights or more.
 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)
 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)



Potential Market Size for the Regions

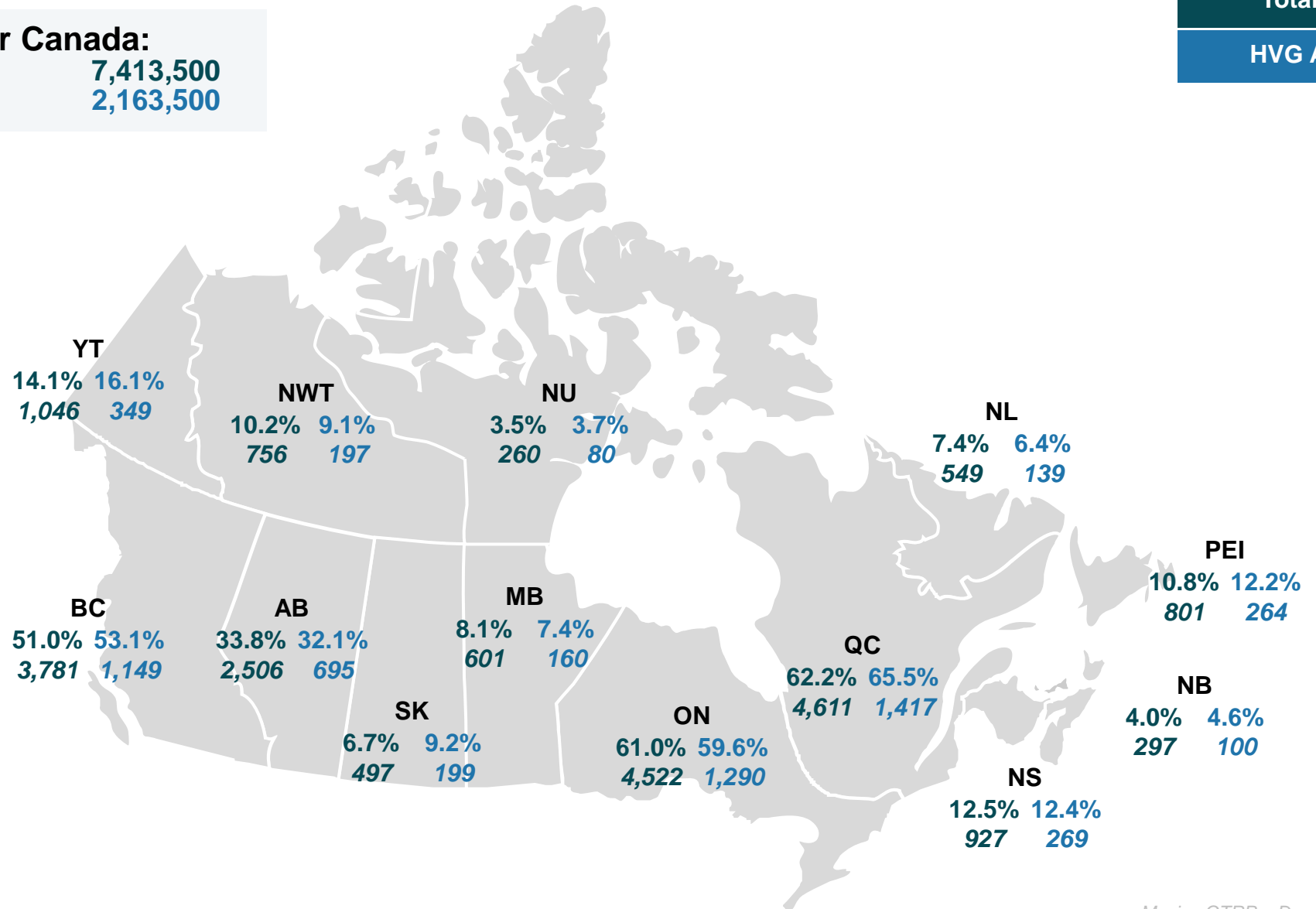


Total Mexico

HVG Audience

Immediate Potential for Canada:
Total Mexico: 7,413,500
HVG Audience: 2,163,500

Key:
 % likely to visit region
 Immediate potential (000s)





Key Performance Indicators



Prince Albert National Park
Saskatchewan



Key Performance Indicators

Indicator	Definition	All Long-Haul Travellers (n=1571)	HVG Audience (n=376)
Unaided destination consideration	% who mentioned Canada or a destination in Canada on their consideration list ¹	19%	26%+
Aided destination consideration	% who rate Canada 4 or 5 (I am seriously considering) out of 5	67%	71%
Aided awareness of travel opportunities in Canada	% with excellent/very good knowledge of travel opportunities in Canada	51%	62%+
Past visitation	% who have ever visited Canada for pleasure	44%	65%+

¹ For trips in the next 2 years.

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

B1. You mentioned that you are likely to take a long-haul holiday trip **outside of Mexico and Central America** in the next 2 years. Which destinations are you seriously considering? (Please list up to 3 destinations)

C2. You may have already mentioned this before, but would you consider visiting each of the following destinations in the next 2 years? Please use a 5-point scale where 1 means 'I am definitely not considering' and 5 means 'I am seriously considering'.

C5. How would you rate your level of knowledge of holiday opportunities in each of the following destinations? (Select one for each)

B5. Which of the following countries or regions have you visited while on a holiday trip **outside of Mexico and Central America** which was 4 or more nights long?



Key Performance Indicators: Seasonal & Indigenous



Indicator	Definition	All Long-Haul Travellers	HVG Audience
Unaided <u>fall</u> destination	% who mentioned Canada or a destination in Canada ¹	27%	32%
Aided destination consideration for <u>fall</u>	% consider Canada for the months of September, October and/or November ²	33%	38%+
Unaided <u>winter</u> destination	% who mentioned Canada or a destination in Canada ¹	38%	38%
Aided destination consideration for <u>winter</u>	% consider Canada for the months of December, January and/or February ²	38%	39%
Unaided <u>Indigenous Tourism</u> destination	% who mentioned Canada or a destination in Canada	2%	4%

¹Among respondents who answered about winter/fall travel

²Among those in the dream to purchase stages of the path to purchase to Canada

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

B2. What destinations come to mind when thinking about travel to experience the **winter** season? Total (n=776); HVG (n=188)

B3. What destinations come to mind when thinking about travel to experience the **autumn** season? Total (n=795); 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? Total (n=1311); HVG (n=332)

B4. What destinations come to mind when thinking about **Indigenous tourism**? Total (n=1571); HVG (n=376)





Market Outlook



St. John's

Newfoundland and Labrador



Market Outlook

Indicator	Definition	All Long-Haul Travellers (n=1571)	HVG Audience (n=376)
Incidence of long-haul pleasure travel	% who have taken a long-haul pleasure trip in the past 3 years	76%	100% +
Long-haul travel intentions	% who plan ¹ to take a long-haul pleasure trip in the next 2 years	84%	100% +
Market Outlook (Net change in long-haul travel)	% who will <u>spend a little more</u> on travel outside of Mexico and Central America in the next 12 months MINUS % who will <u>spend a little less</u>	-1%	+24%

¹ Who are 'Definitely' or 'Very Likely' to take a long-haul trip in the next 2 years.

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

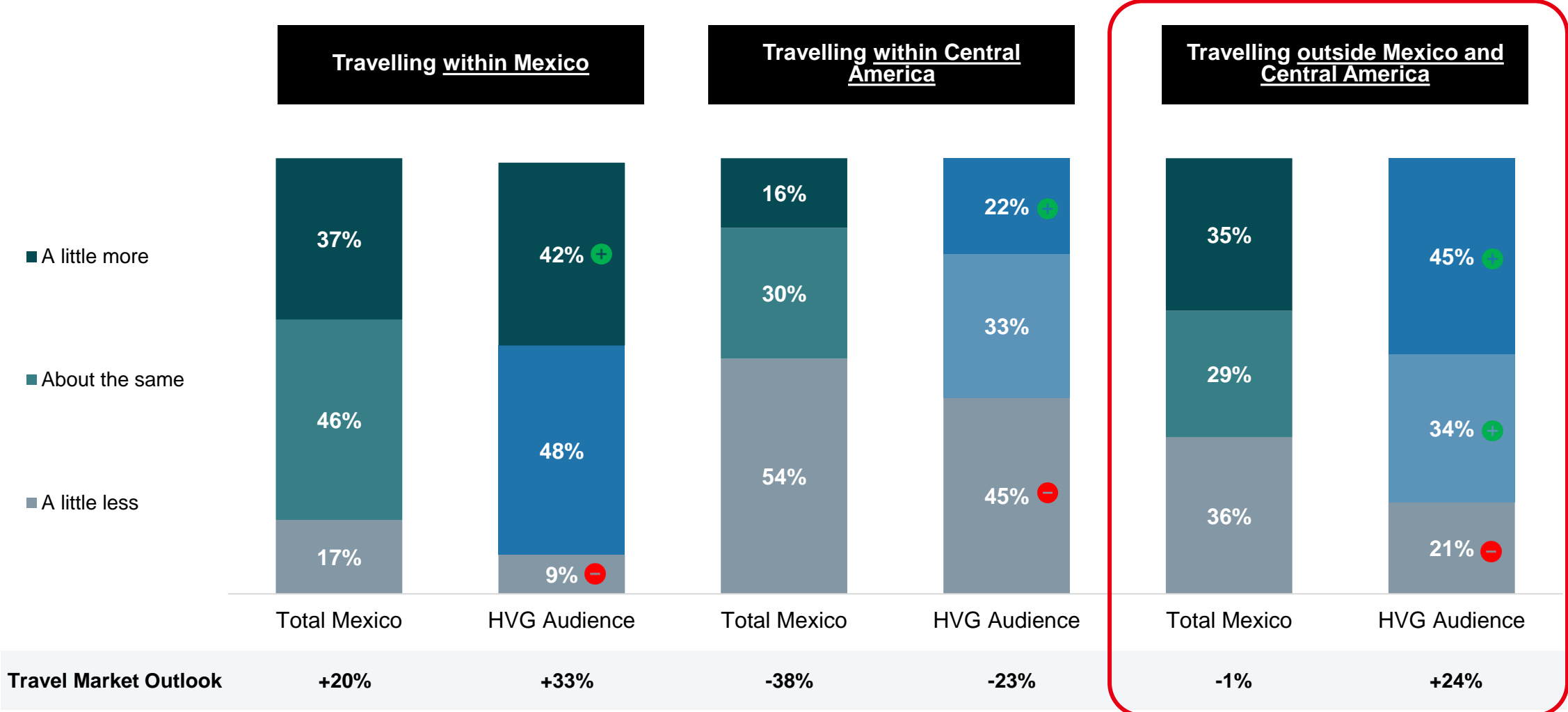
A7. In the past 3 years, have you taken a long-haul holiday trip of 4 or more nights **outside of Mexico and Central America** where you spent at least 1 night in paid accommodations? (Select one only)

A9. In the next 2 years, how likely is it that you will take a long-haul holiday trip of 4 or more nights **outside of Mexico and Central America** where you will spend at least 1 night in paid accommodations? (Select one only)

A5. How would you describe your spending intentions on the following items in the next 12 months compared to the 12 months? Will you spend...



Spending Intentions (in Next 12 Months)

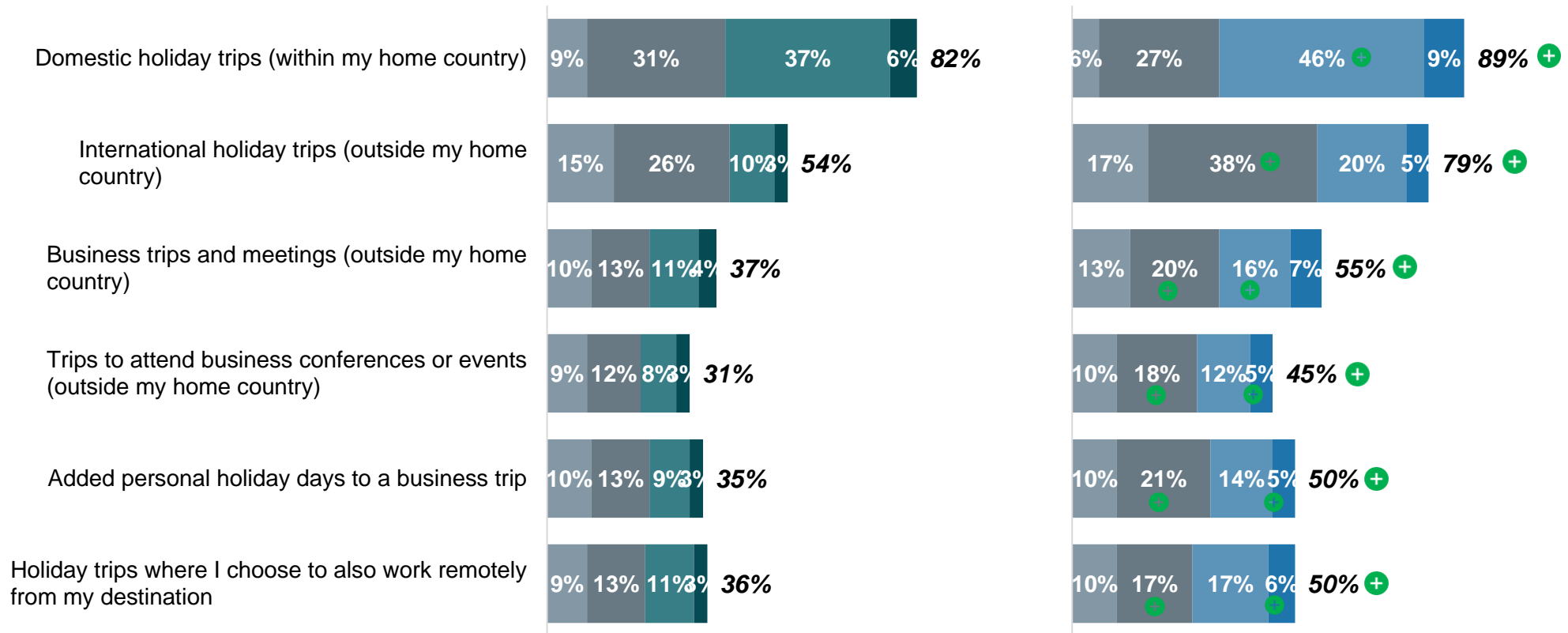


Types of Travel Trips

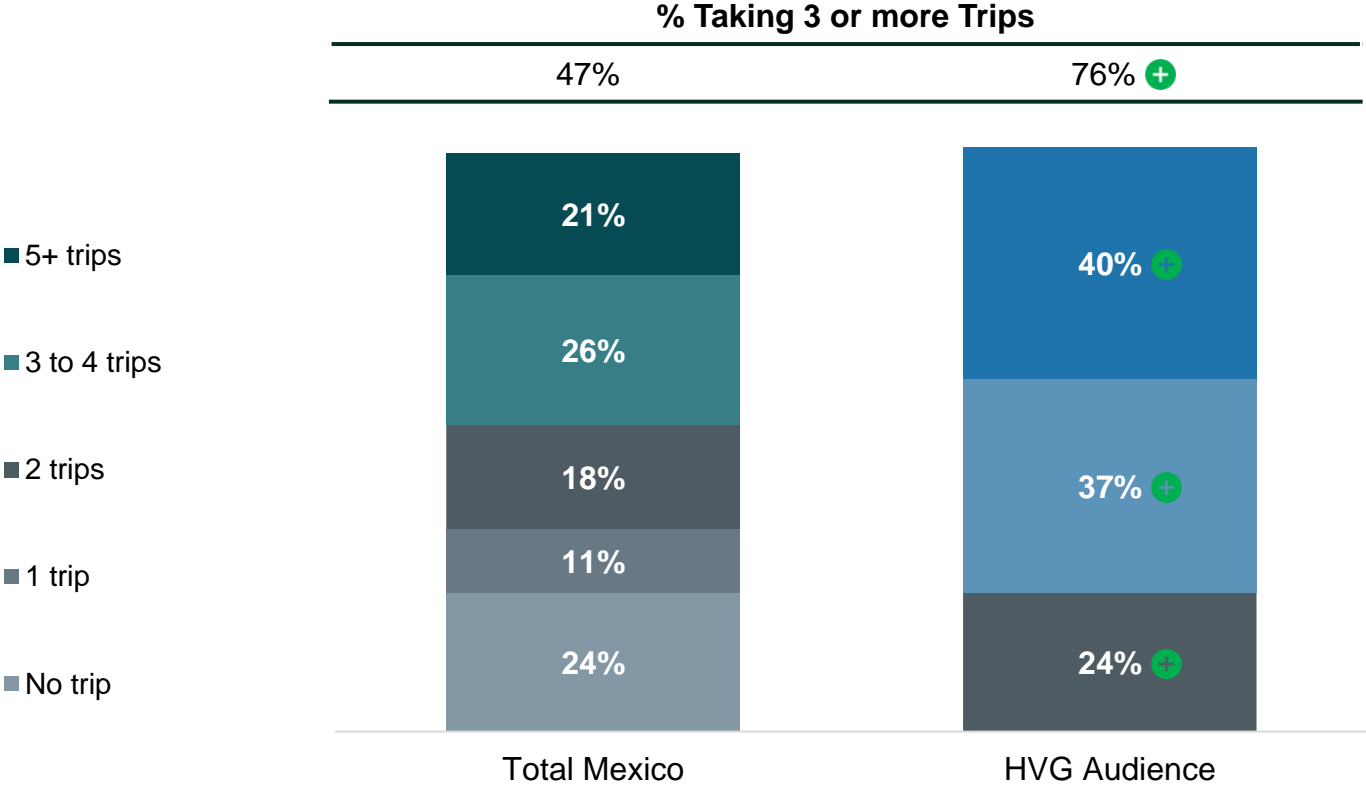
Total Mexico

HVG Audience

■ Sometimes (once every 2 years)
 ■ Regularly (once a year)
 ■ Often (several times a year)
 ■ Very often (about once a month or more)
 ■ At least every 2 years




Long-Haul Travel Intensity





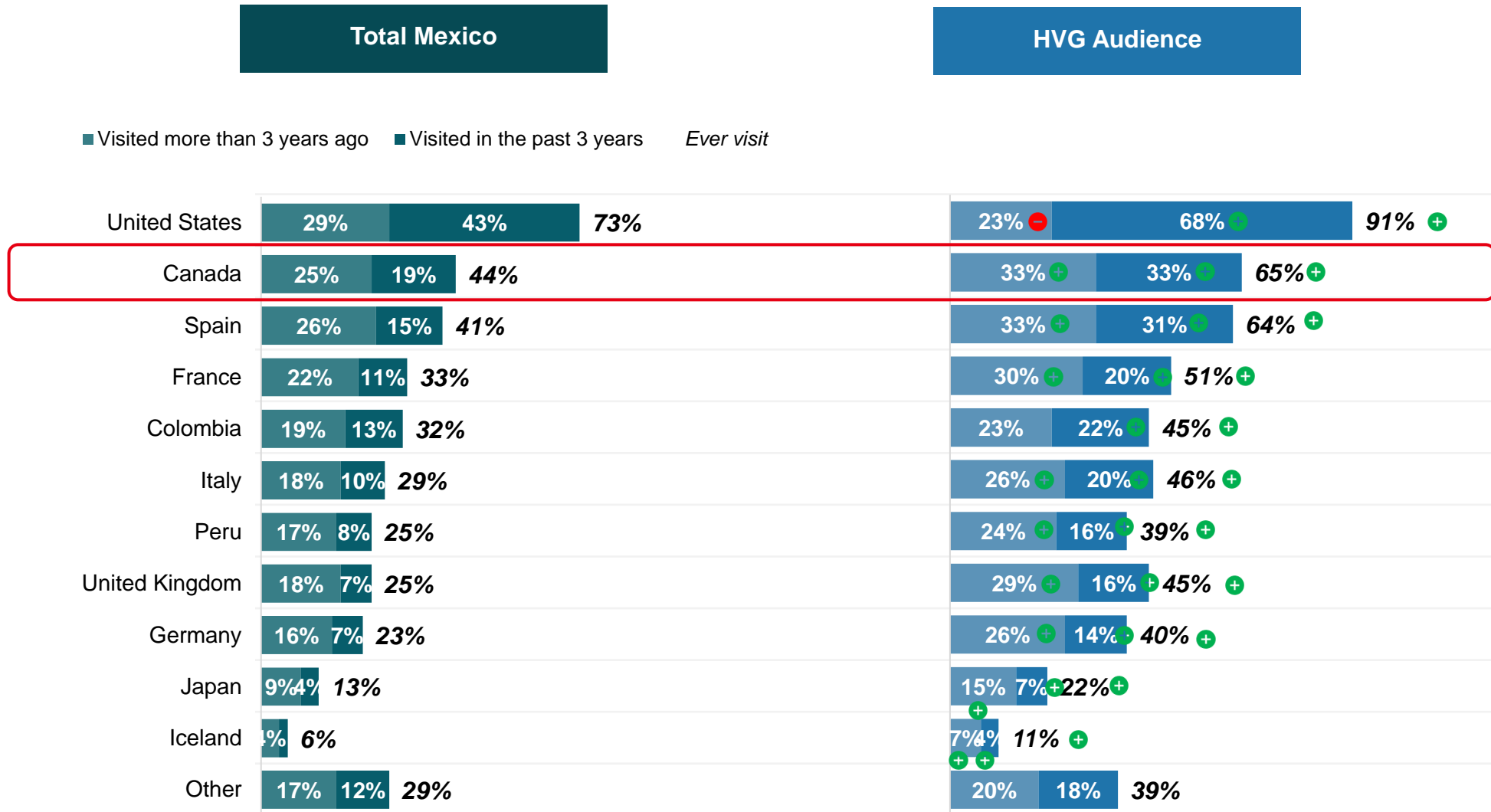
Canada vs. Competitors



 Peggy's Cove
Nova Scotia



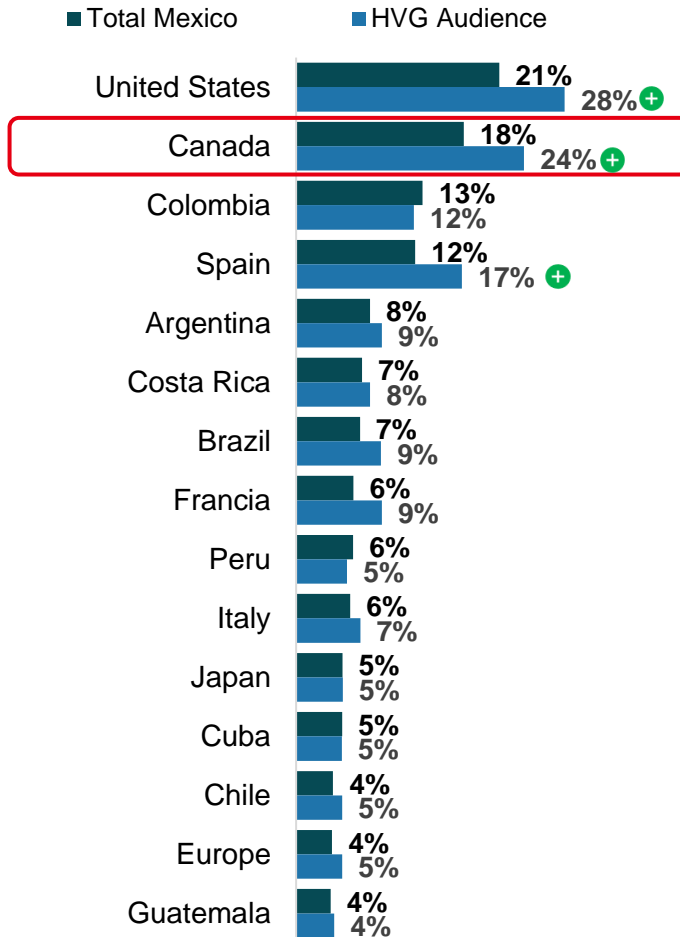
Past Visitation



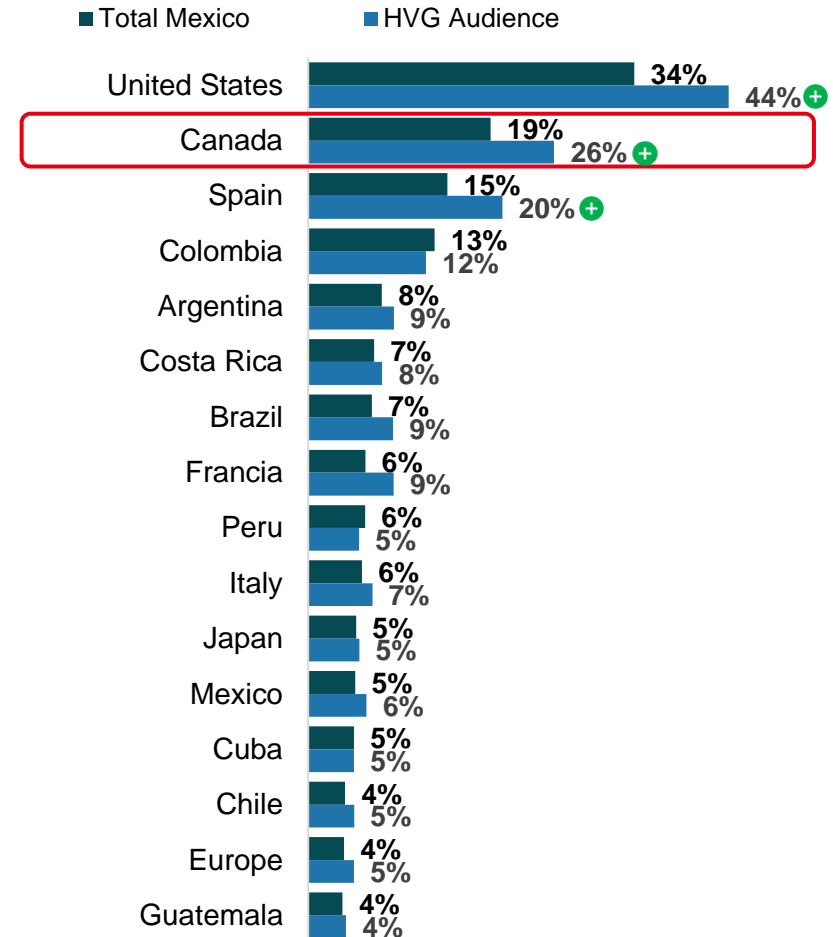
Unaided Long-Haul Destination Consideration (Next 2 Years)



Top Destination Brands¹



Top Destinations²



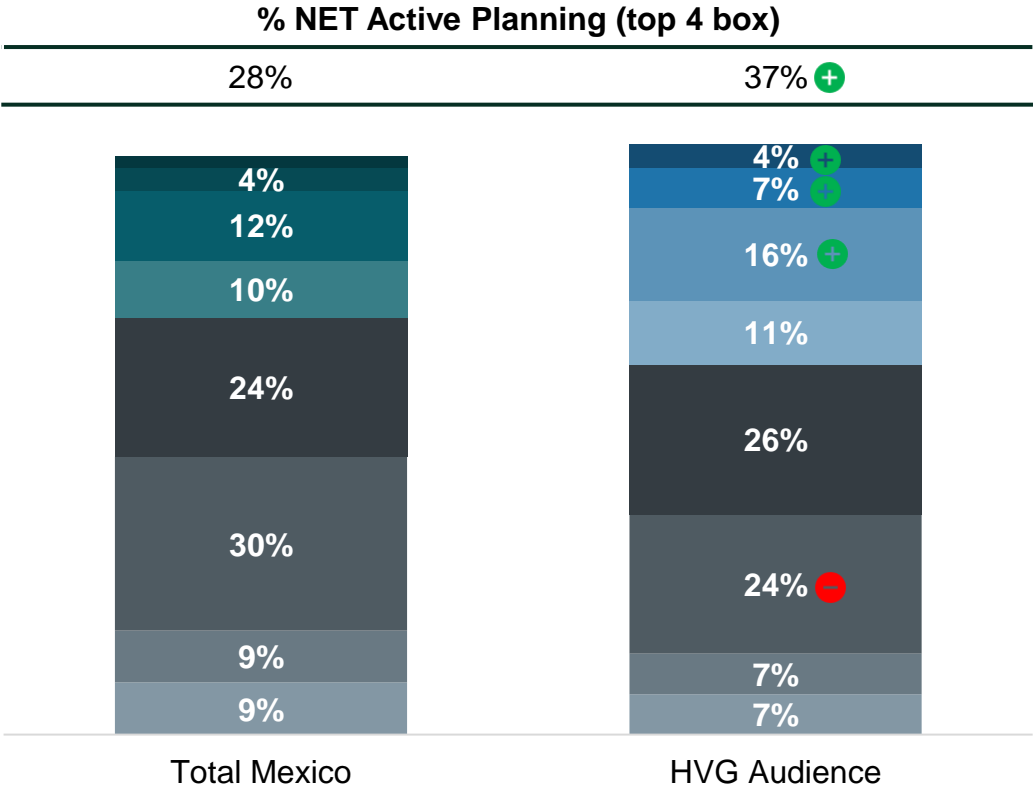
¹ Responses as mentioned by respondents (e.g., percentage who said "Canada" specifically).
² Roll-up of brand mentions by country (e.g., percentage who said "Canada" or any destination in Canada).
 Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1571); HVG (n=376)
 B1. You mentioned 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)



Path to Purchase 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



21 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) (n=1571); HVG (n=376)

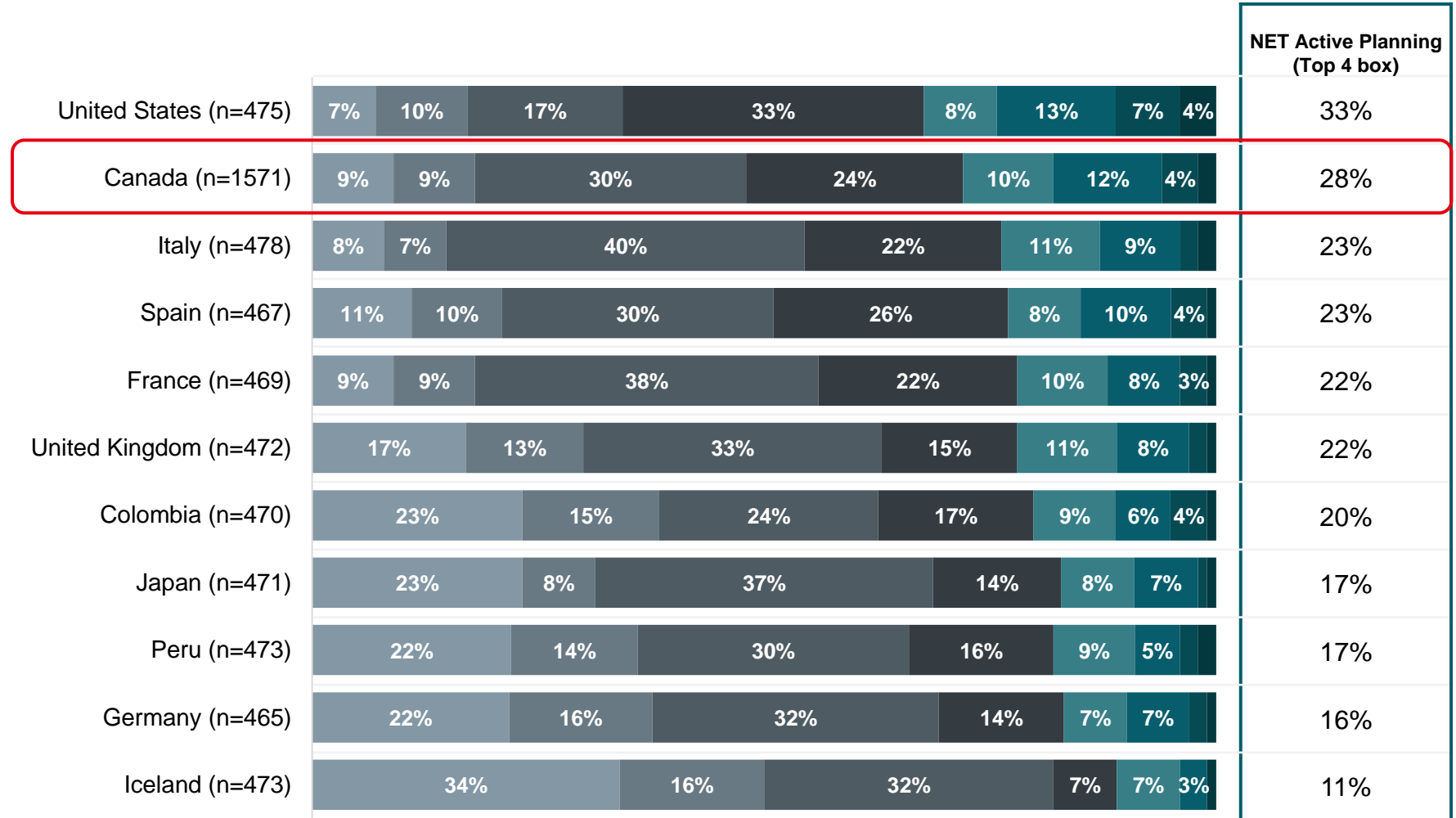
C1. Which of the following best describes your current situation when thinking about each of the following destinations for a holiday trip? (Select one for each)



Stage in the Purchase Cycle: Total Mexico



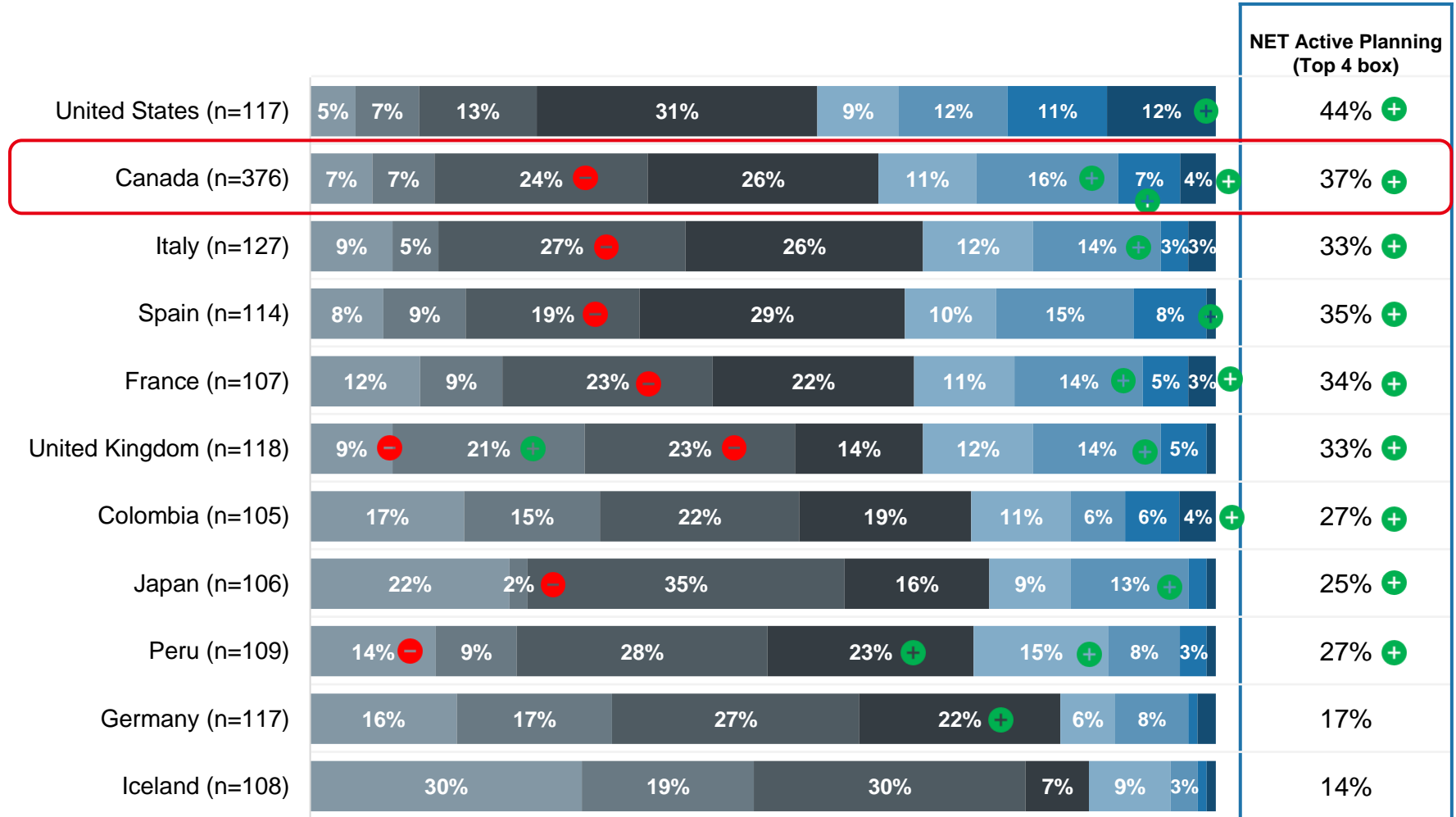
- Have never thought of taking a trip to this destination
- Not interested in visiting / returning in the foreseeable future
- Dreaming about visiting / returning someday
- Seriously considering visiting / returning in the next 2 years
- Have started to gather some travel information for a trip to this country
- Am planning the itinerary for a trip to this country
- Am currently making transportation and accommodation arrangements
- Have already booked my transportation and accommodations



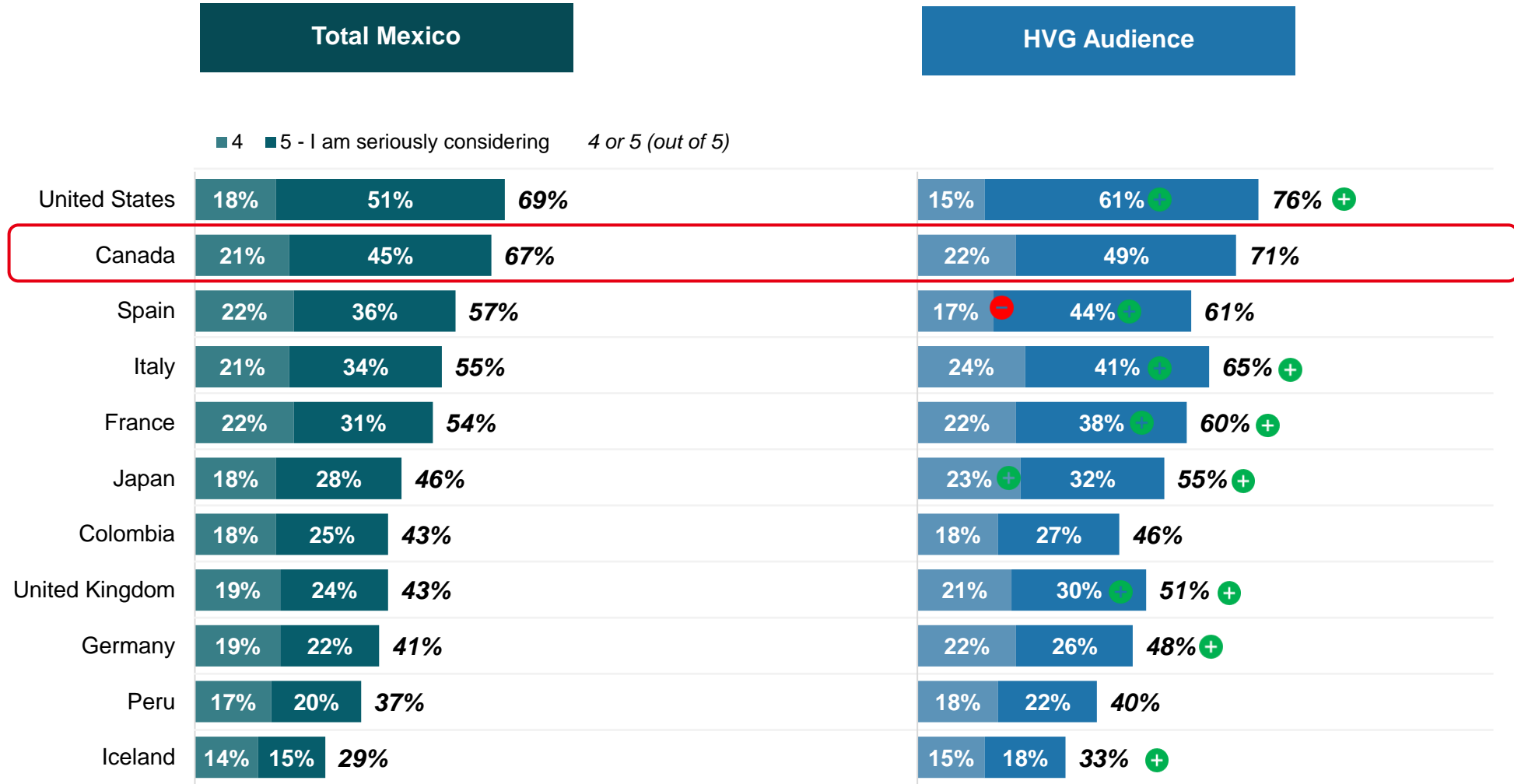
Stage in the Purchase Cycle: Among HVG Audience



- Have never thought of taking a trip to this destination
- Not interested in visiting / returning in the foreseeable future
- Dreaming about visiting / returning someday
- Seriously considering visiting / returning in the next 2 years
- Have started to gather some travel information for a trip to this country
- Am planning the itinerary for a trip to this country
- Am currently making transportation and accommodation arrangements
- Have already booked my transportation and accommodations



Destination Consideration (Next 2 Years)



Destination Consideration By Seasons

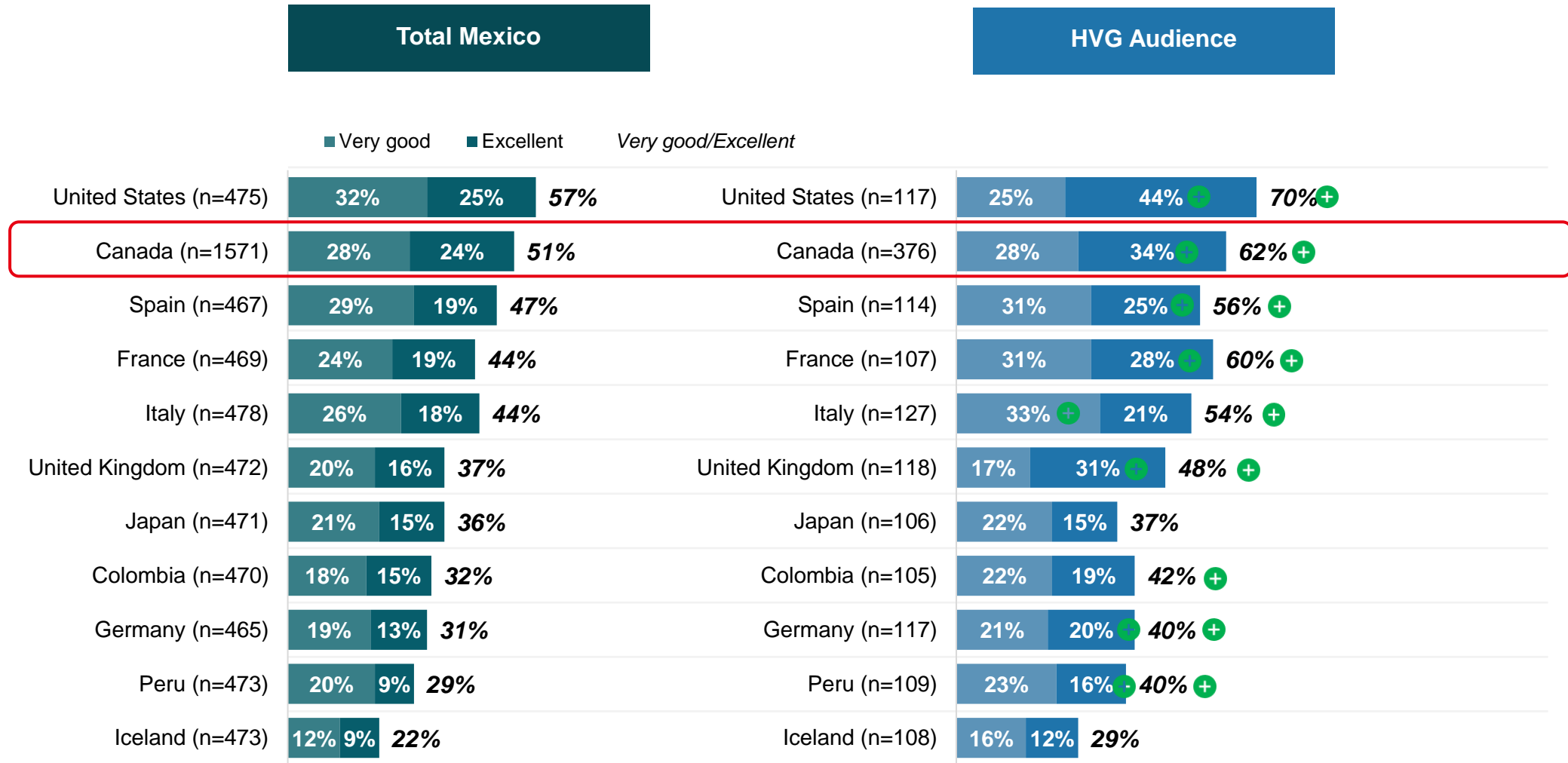


Total Mexico	Winter (Dec, Jan, Feb)	Spring (Mar, Apr, May)	Summer (Jun, Jul, Aug)	Fall (Sept, Oct, Nov)
Canada (n=1311)	38%	36%	39%	33%
Colombia (n=294)	31%	46%	37%	26%
France (n=388)	32%	41%	42%	33%
Germany (n=298)	29%	35%	45%	28%
Iceland (n=243)	30%	42%	40%	33%
Italy (n=409)	29%	39%	39%	33%
Japan (n=329)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

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



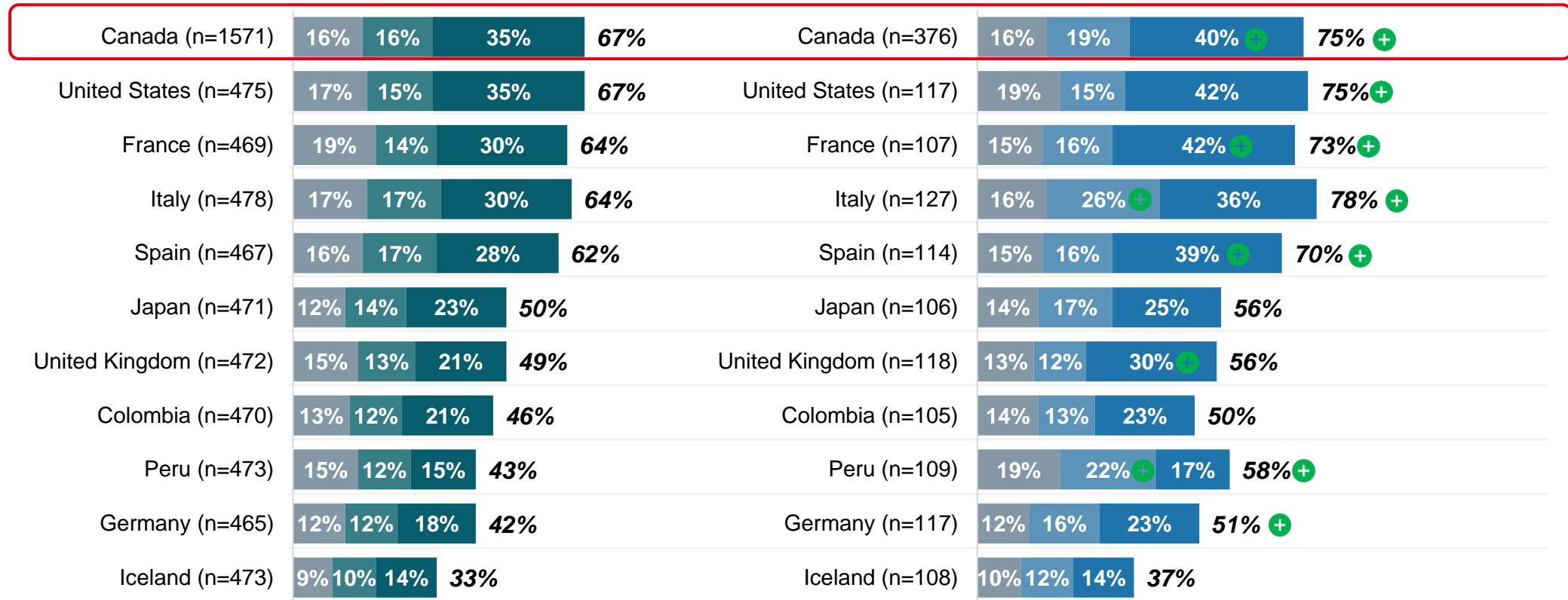
Knowledge of Holiday Opportunities



Total Mexico

HVG Audience

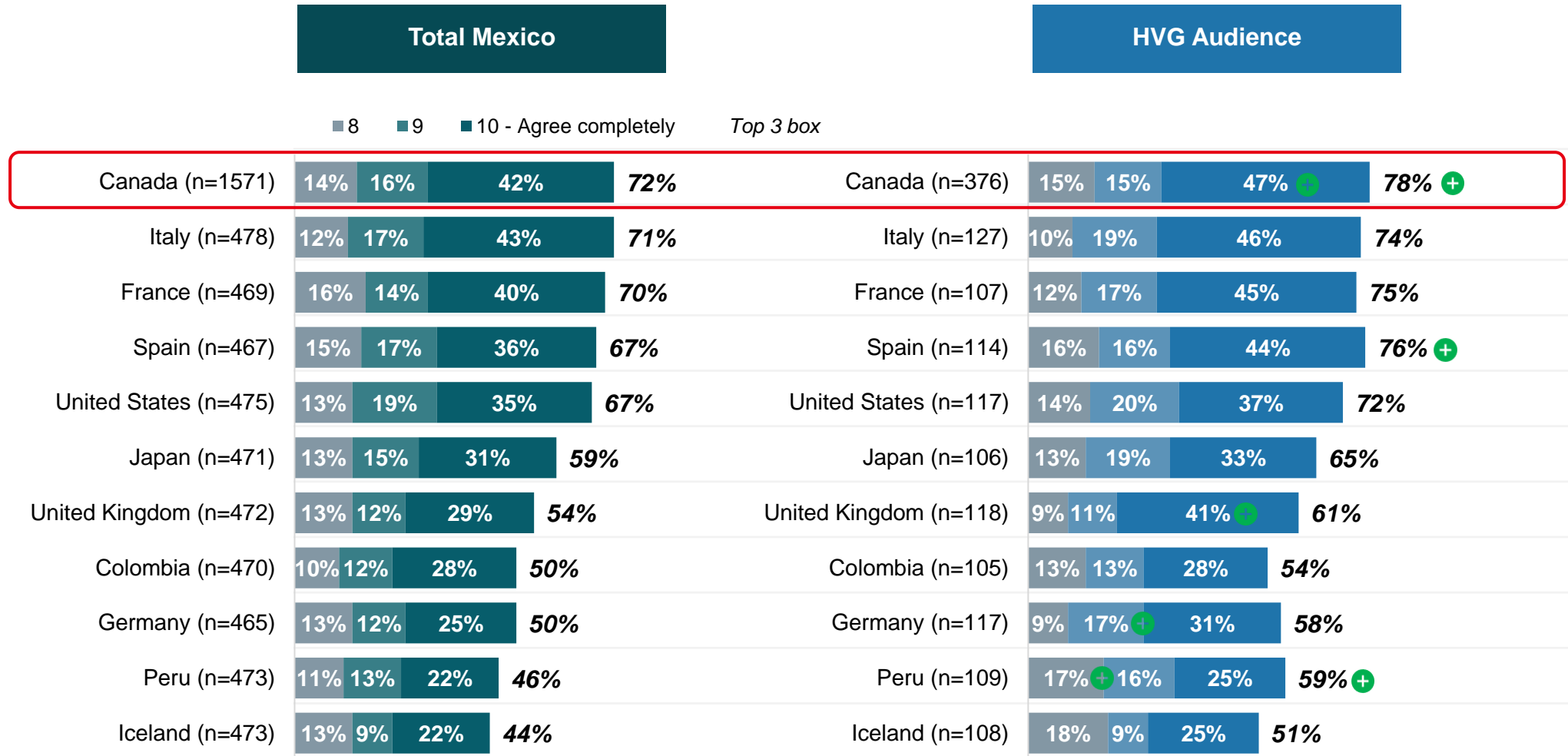
■ 8 ■ 9 ■ 10 - Exactly what I'm looking for Top 3 box



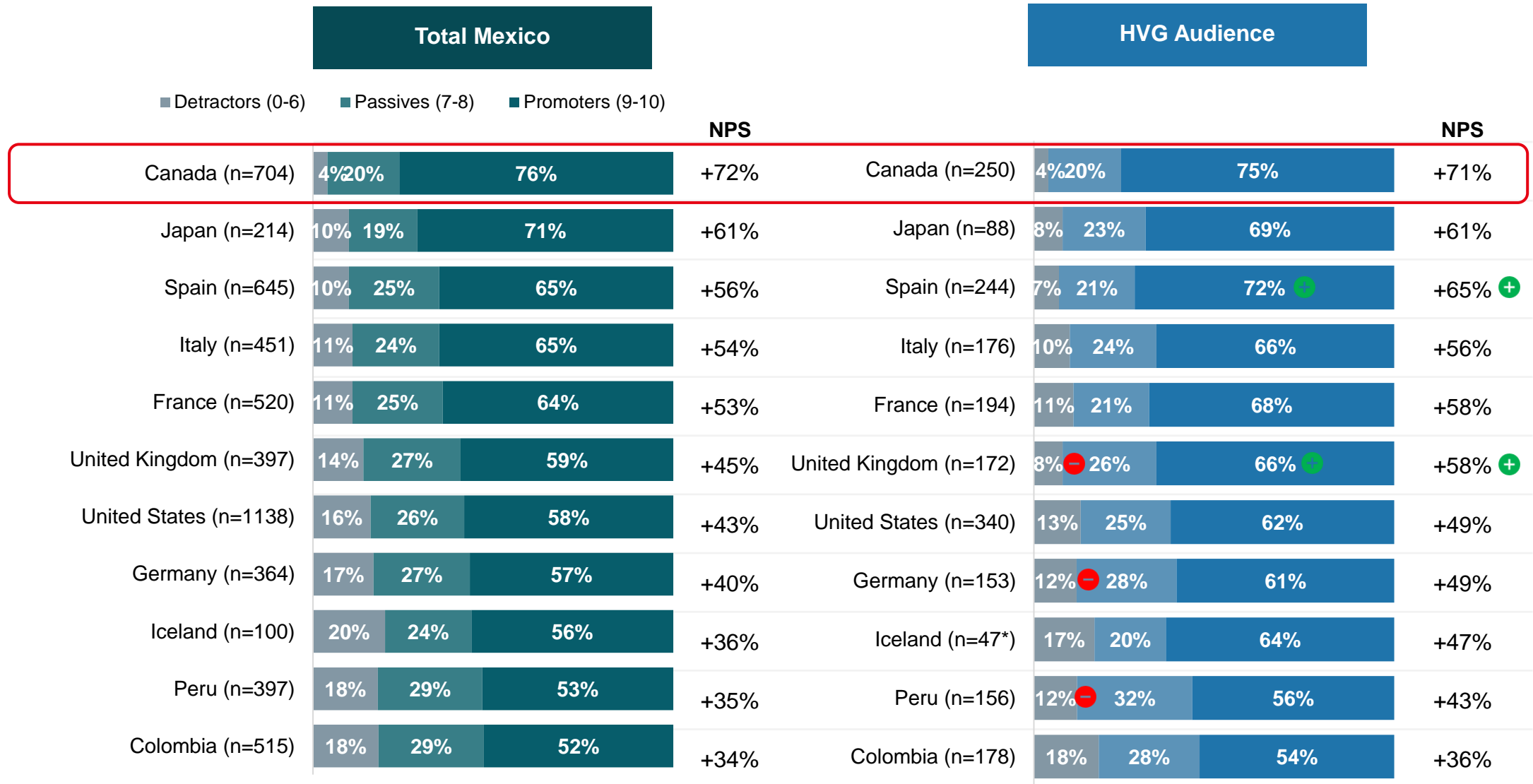
27 Note: all respondents evaluated Canada plus 3 randomly selected countries from the competitive set. Base: Long-haul pleasure travellers (past 3 years or next 2 years), Evaluated [DESTINATION] C3. Please rate each destination in terms of what you are looking for in a holiday destination.



Destination Appeal



Net Promoter Score (NPS)



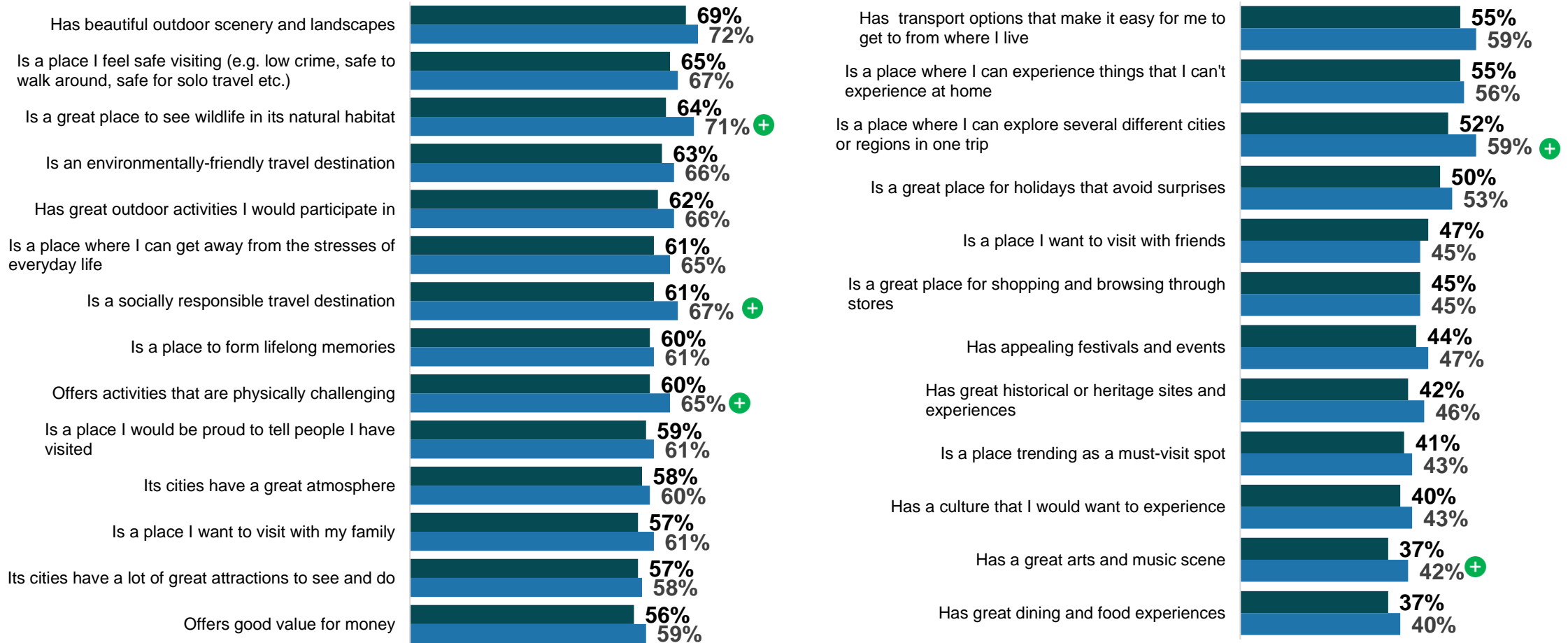
Note: all respondents evaluated countries they have ever visited from the competitive set.
 Base: Long-haul pleasure travellers (past 3 years or next 2 years), Visited [DESTINATION]
 C8. How likely are you to recommend each of the following holiday destinations to a friend, family member or colleague?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



Impressions of Canada as a Holiday Destination



■ Total Mexico ■ HVG Audience



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) (n=1571); HVG (n=376) 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.



Destination Attributes – Relative Strengths & Weaknesses: Among Total Mexico



		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	Is a place I want to visit with friends											
	Is a place I want to visit with my family											
	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				
	Is a place trending as a must-visit spot											
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.



Destination Attributes – Relative Strengths & Weaknesses : Among HVG Audience

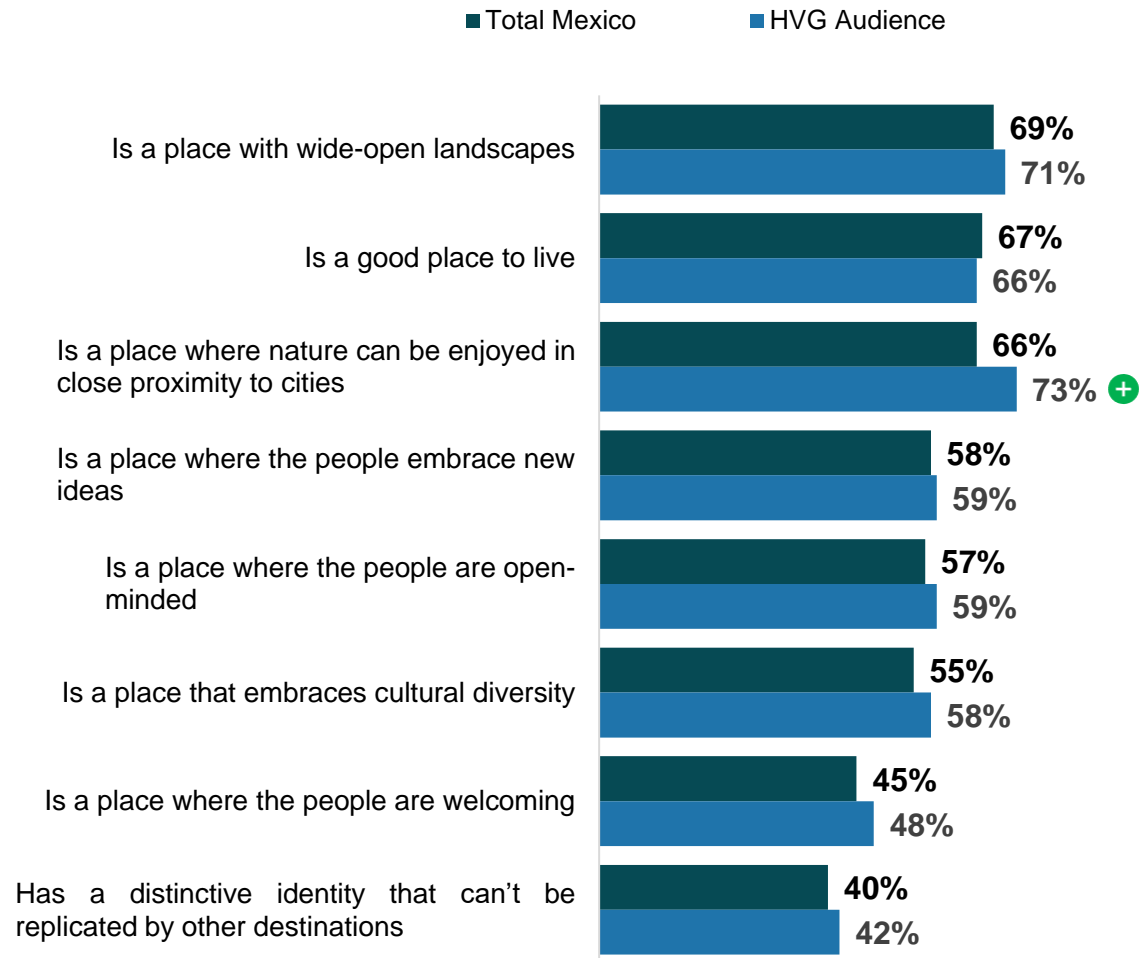


		Canada	Colombia	France	Germany	Iceland	Italy	Japan	Peru	Spain	United Kingdom	United States
	n=	376	105	107	117	108	127	106	109	114	118	117
Higher Order Motivations	Is a place where I can get away from the stresses of everyday life								Strength			
	Is a place to form lifelong memories											
	Is 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	Is a place I want to visit with friends											
	Is a place I want to visit with my family											
	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				
	Is a place trending as a must-visit spot	Weakness		Strength			Strength					
To-Do	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 for Canada



Brand Value Statements: Among Total Mexico



	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.



Brand Value Statements: Among HVG Audience



	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

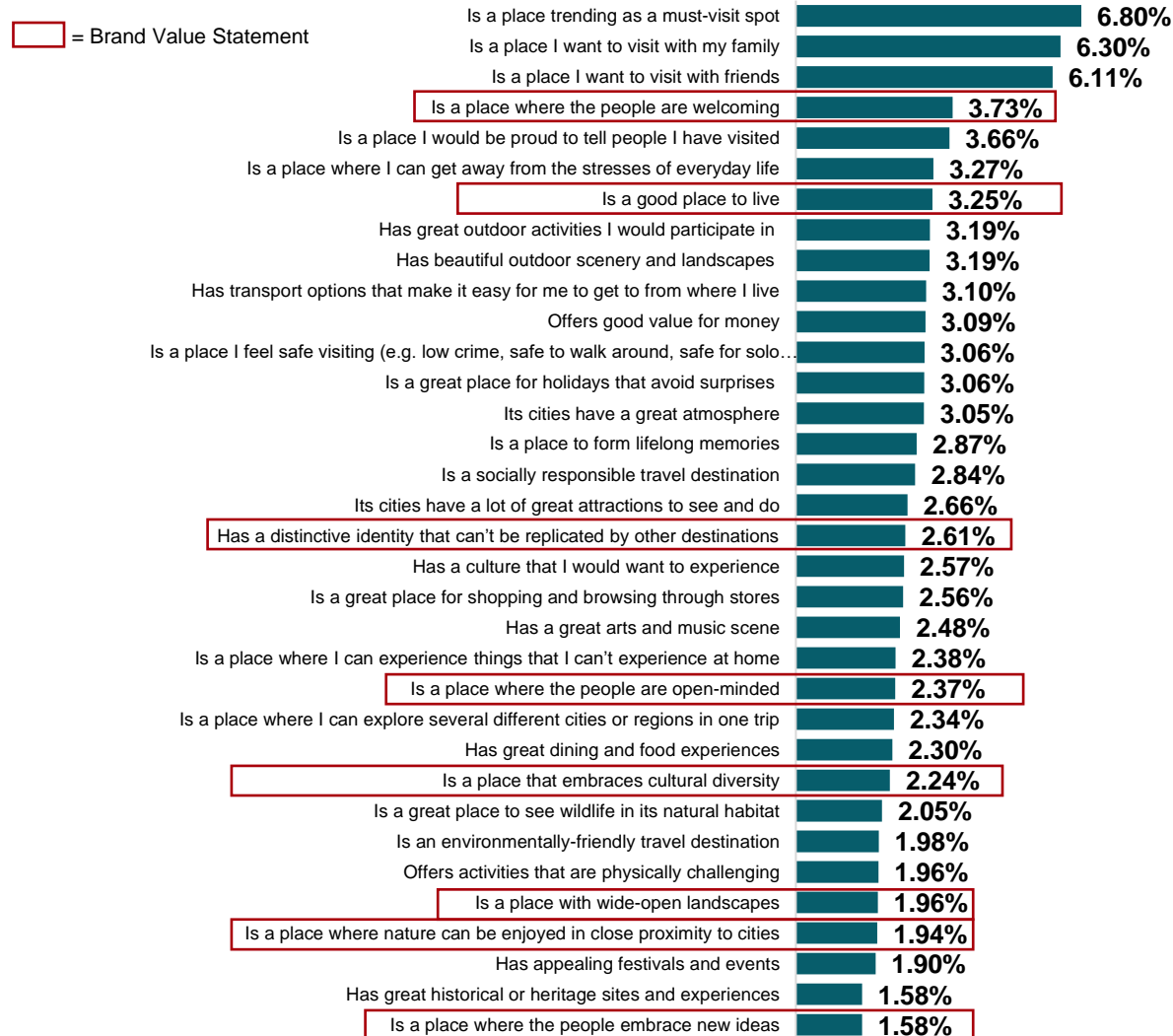
Note: all respondents evaluated Canada plus 3 randomly selected countries from the competitive set.
 Base: Long-haul pleasure travellers (past 3 years or next 2 years), HVG Audience, Evaluated [DESTINATION]
 C6. We are interested in your general impressions about destinations even if you have never been there. Please select all the destinations you think apply to the statement.
 Select "None of these" if you think none of the destinations apply.



Destination Attributes: Drivers Analysis: Among Total Mexico



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. Amongst brand value statements, welcoming people and 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%)

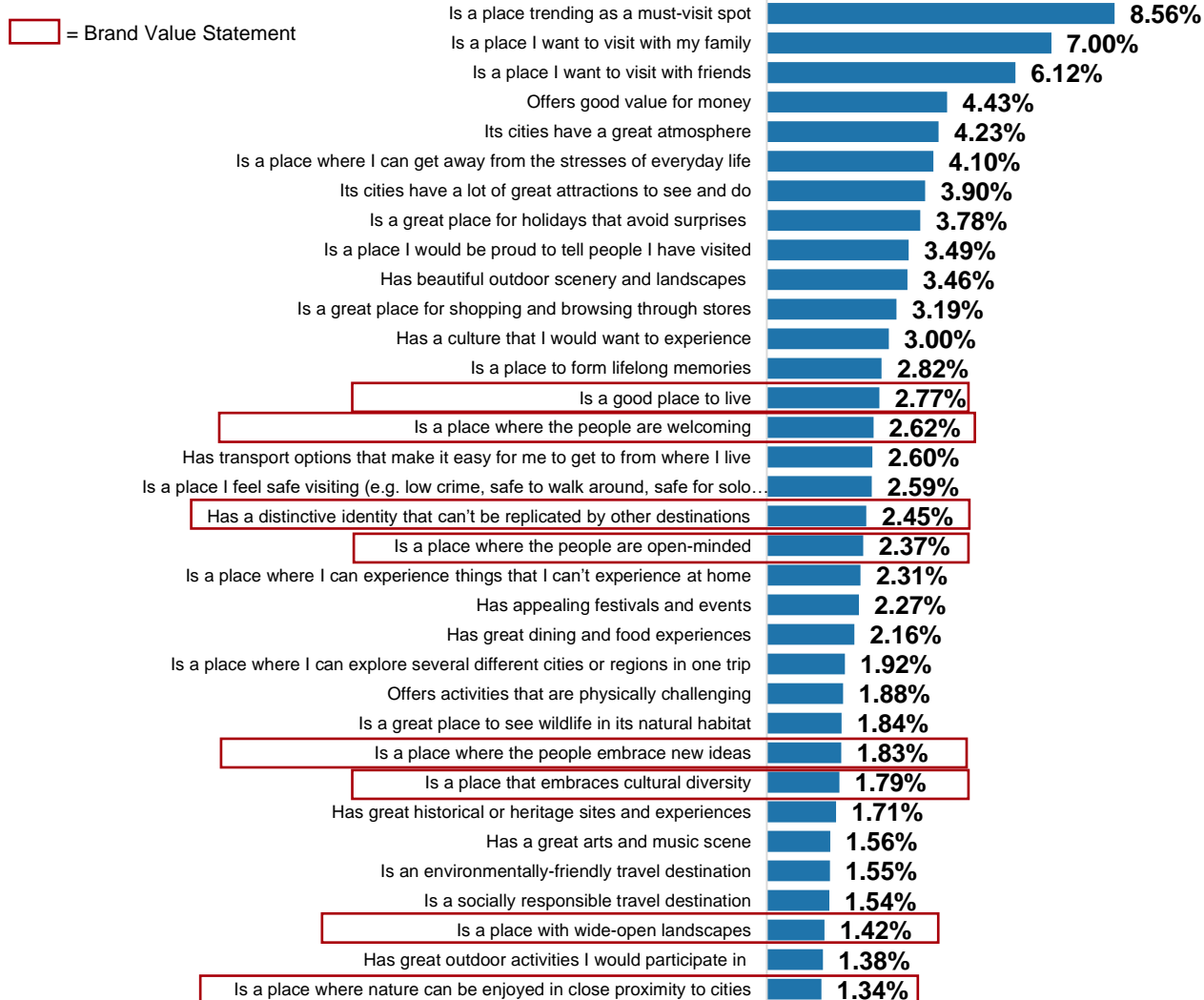
YouGov Global Travel Profiles (United States) – 2023 Base: Target Mexico (México D.F, Nuevo León & Jalisco) 18+



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.

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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%.





Travel Intentions to Canada



Toronto
Ontario



Likelihood to Take a Holiday Trip to Canada (Next 2 Years)



1-3 Night Short Trip

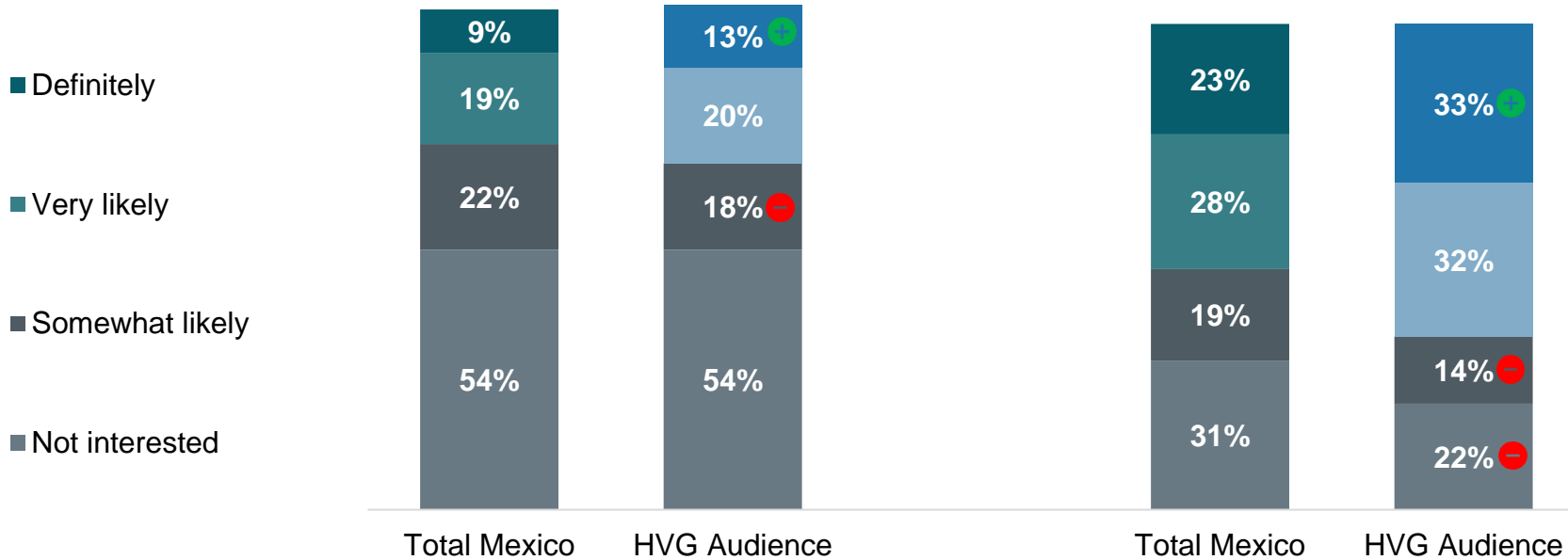
4+ Nights Long Trip

% Top 2 box

% Top 2 box

28% 33% +

51% 65% +



**NET: Definitely/
Very Likely to
visit Canada in
the next 2 years**

**Total: 59%
HVG: 72% +**

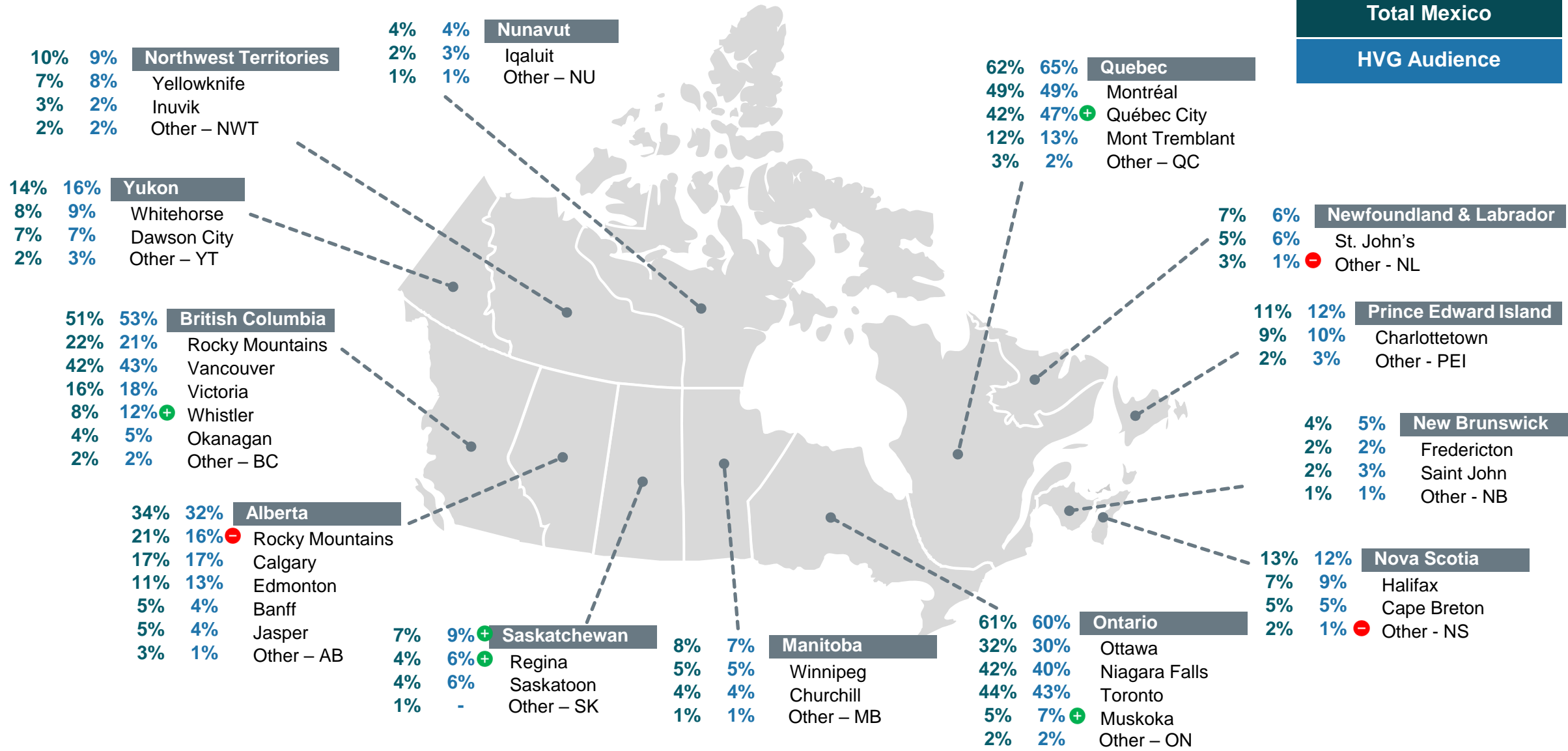
39 Note: "Not interested" is comprised of those saying not very likely, not at all likely, or indicating no intention to visit Canada
Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1571); HVG (n=376)
E1. Realistically, how likely are you to take a holiday trip to Canada in the **next 2 years**? (Select one)



Canadian Destinations Likely to Visit



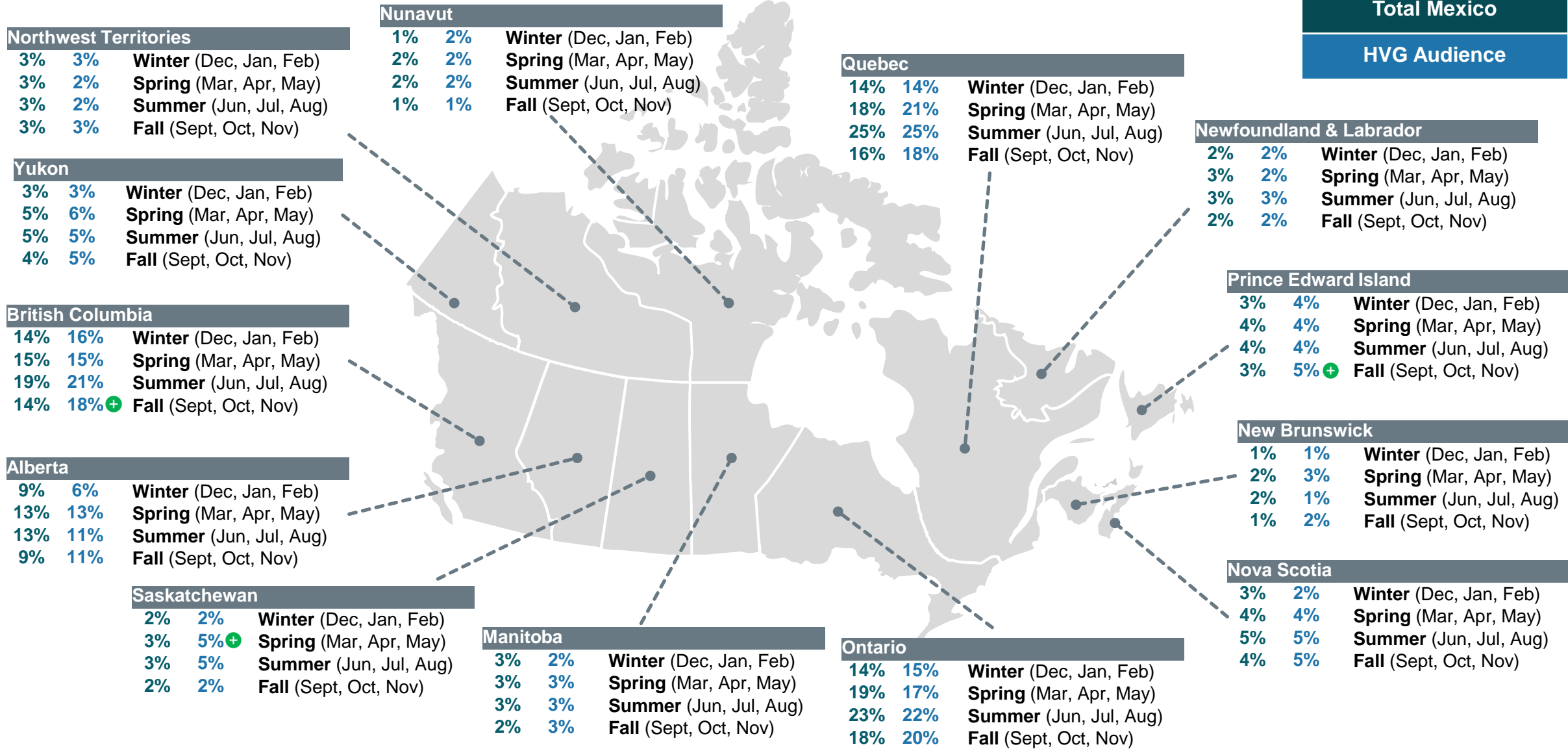
Total Mexico
HVG Audience



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



Total Mexico
HVG Audience



Barriers for Visiting Canada





Travel Behaviours



 Churchill
Manitoba



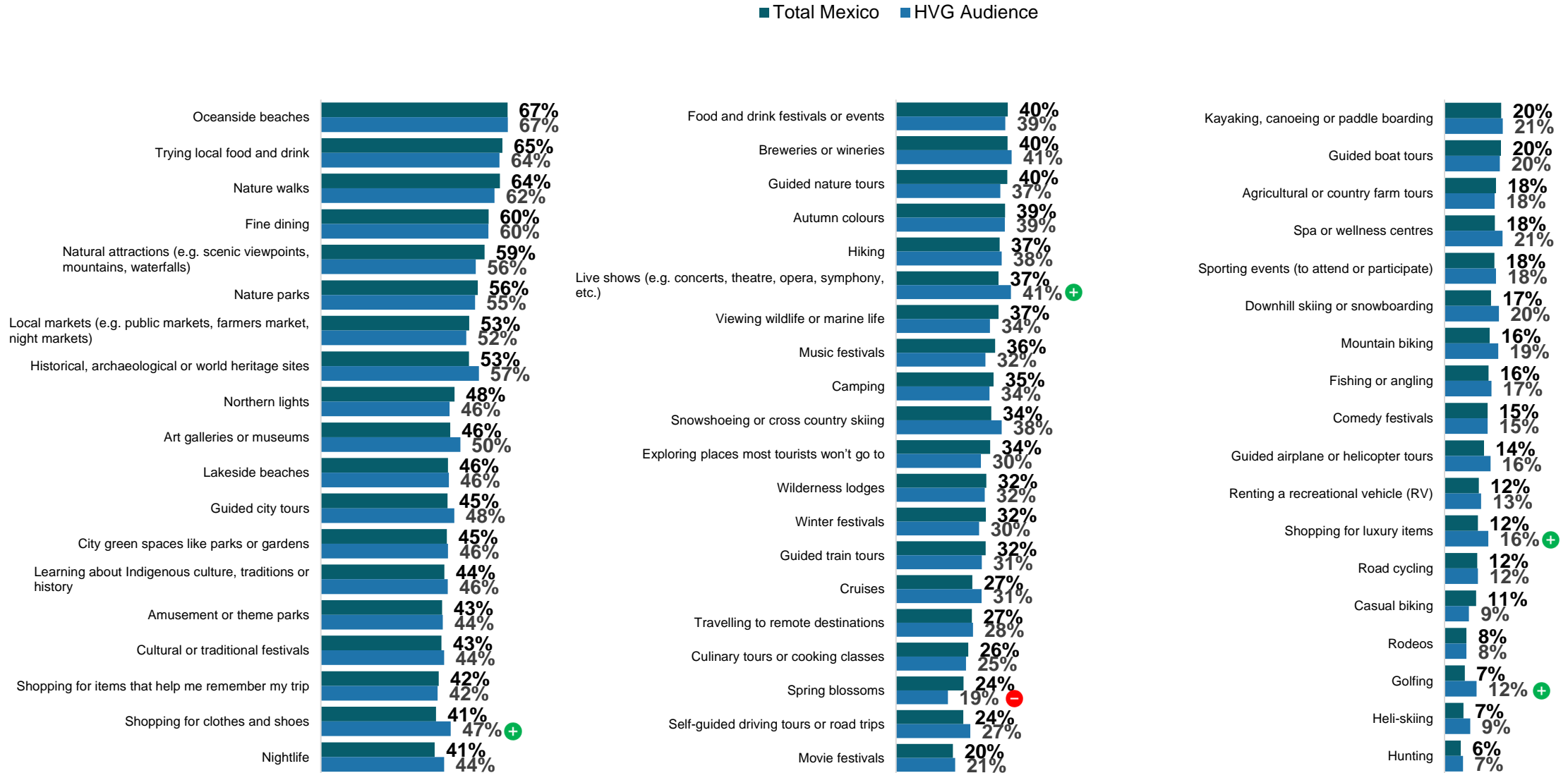
Top 10 Activities Interested In & Trip Anchors

Top 10 General Activities Interested In	
Total Mexico (n=1571)	HVG Audience (n=376)
Oceanside beaches	Oceanside beaches
Trying local food and drink	Trying local food and drink
Nature walks	Nature walks
Fine dining	Fine dining
Natural attractions (e.g. scenic viewpoints, mountains, waterfalls)	Historical, archaeological or world heritage sites
Nature parks	Natural attractions (e.g. scenic viewpoints, mountains, waterfalls)
Local markets (e.g. public markets, farmers market, night markets)	Nature parks
Historical, archaeological or world heritage sites	Local markets (e.g. public markets, farmers market, night markets)
Northern lights	Art galleries or museums
Art galleries or museums	Guided city tours

Top 10 Trip Anchor Activities	
Total Mexico (n=1565)	HVG Audience (n=375)
Oceanside beaches	Oceanside beaches
Fine dining	Fine dining
Trying local food and drink	Historical, archaeological or world heritage sites
Natural attractions (e.g. scenic viewpoints, mountains, waterfalls)	Trying local food and drink
Northern lights	Northern lights
Historical, archaeological or world heritage sites	Art galleries or museums +
Nature parks	Natural attractions (e.g. scenic viewpoints, mountains, waterfalls) -
Nature walks	Nature parks
Learning about Indigenous culture, traditions or history	Nightlife
Art galleries or museums	Local markets (e.g. public markets, farmers market, night markets)

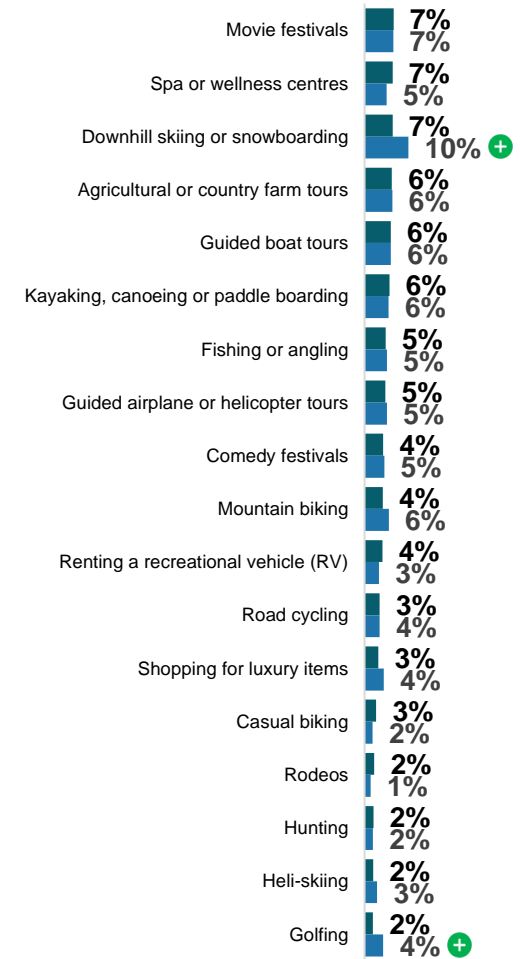
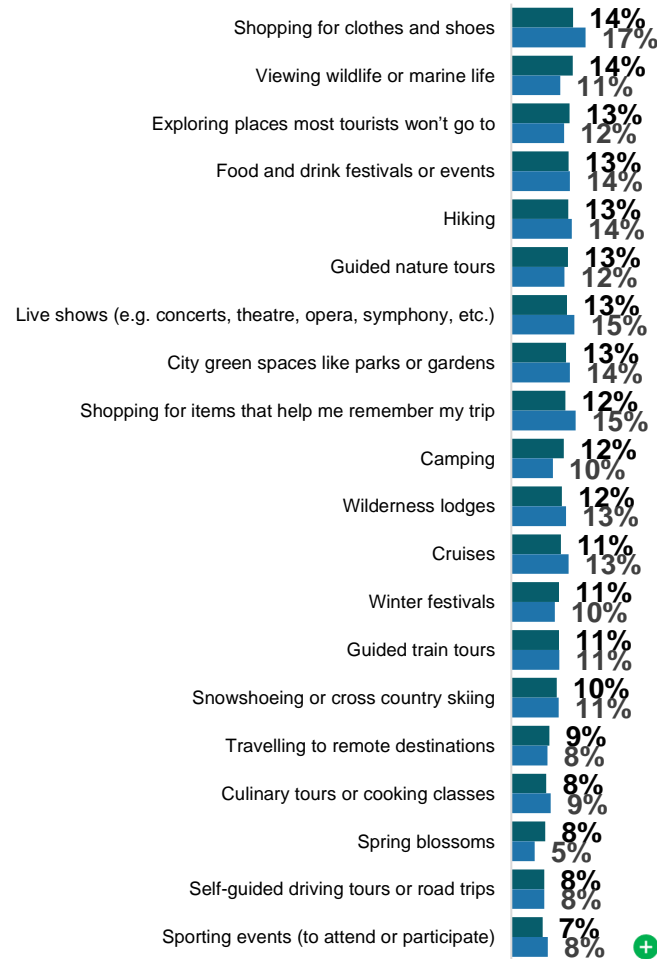


General Activities Interested In

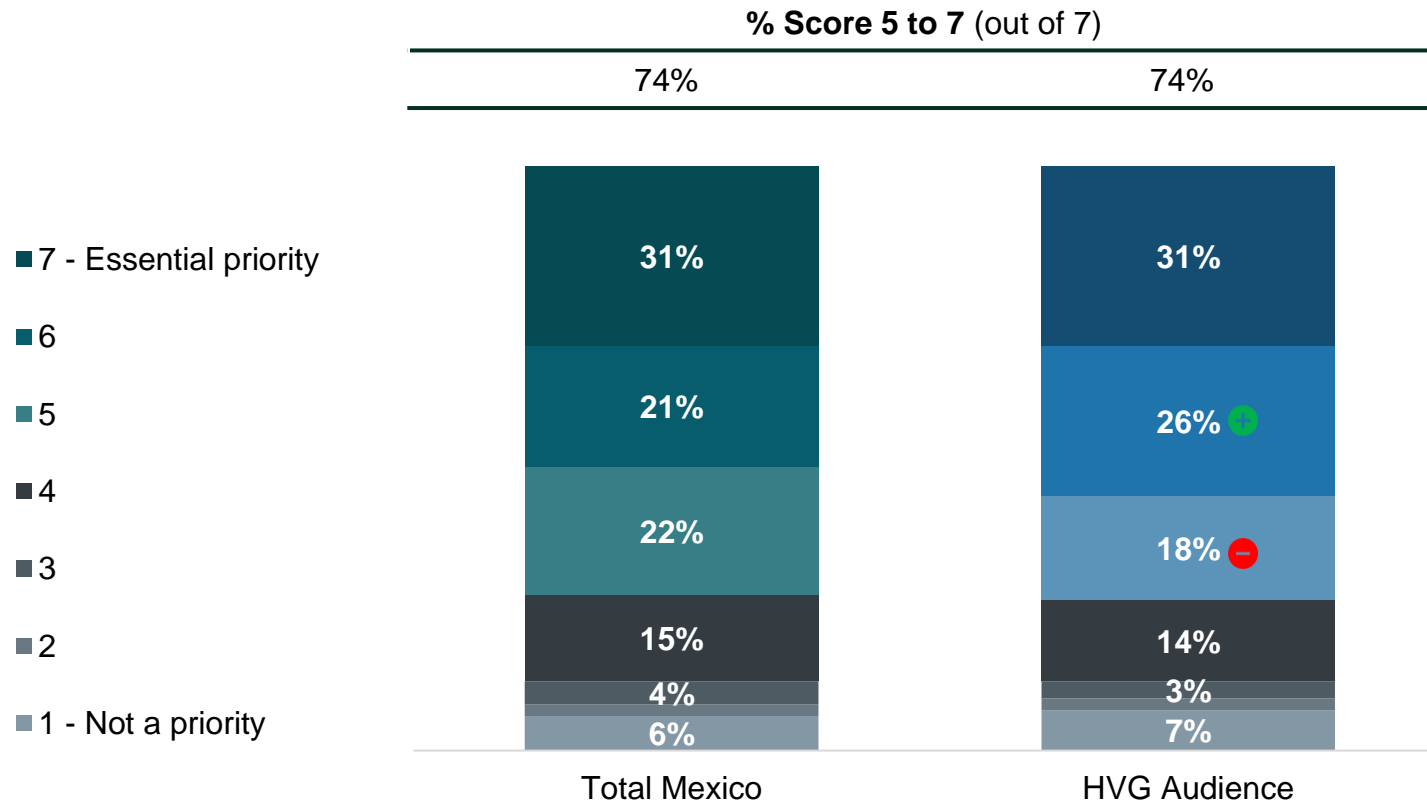


Trip Anchor Activities

■ Total Mexico ■ HVG Audience



Priority of Sustainable Travel When Planning a Trip

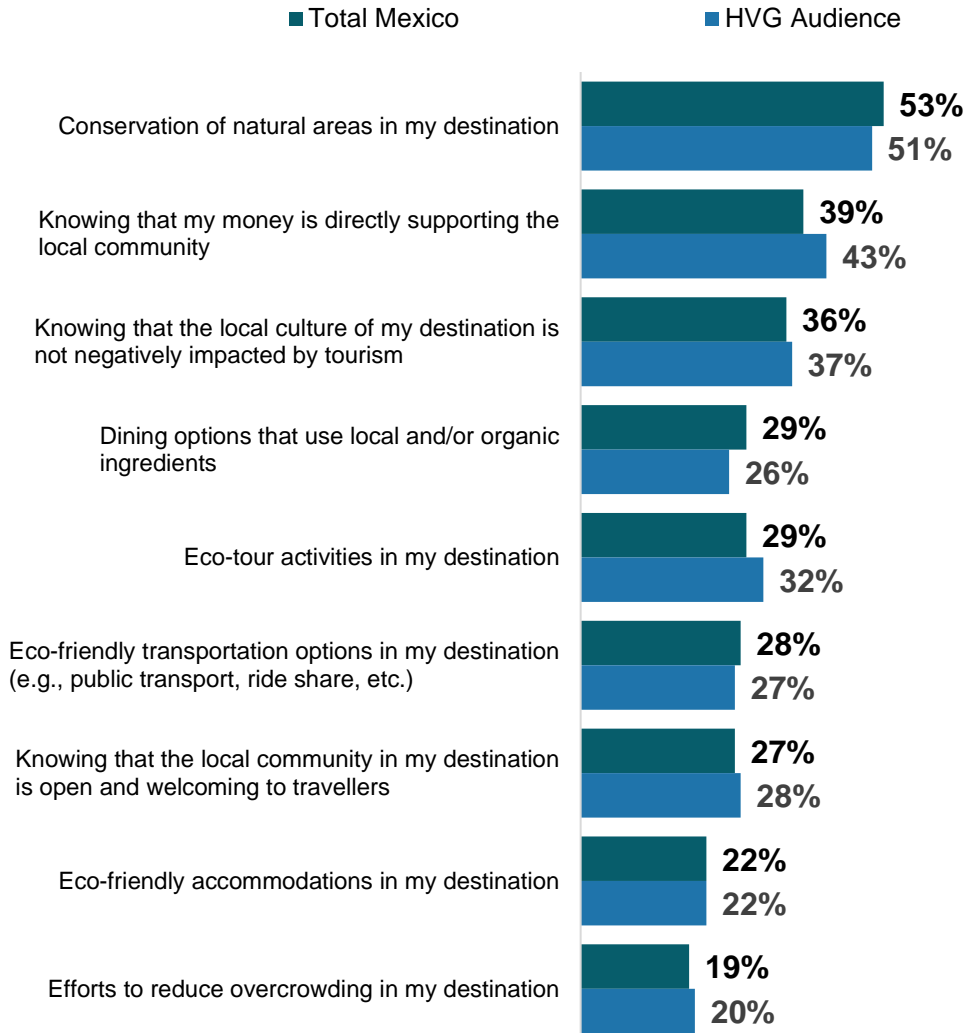


Sustainable Travel Description

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”.

47 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'.

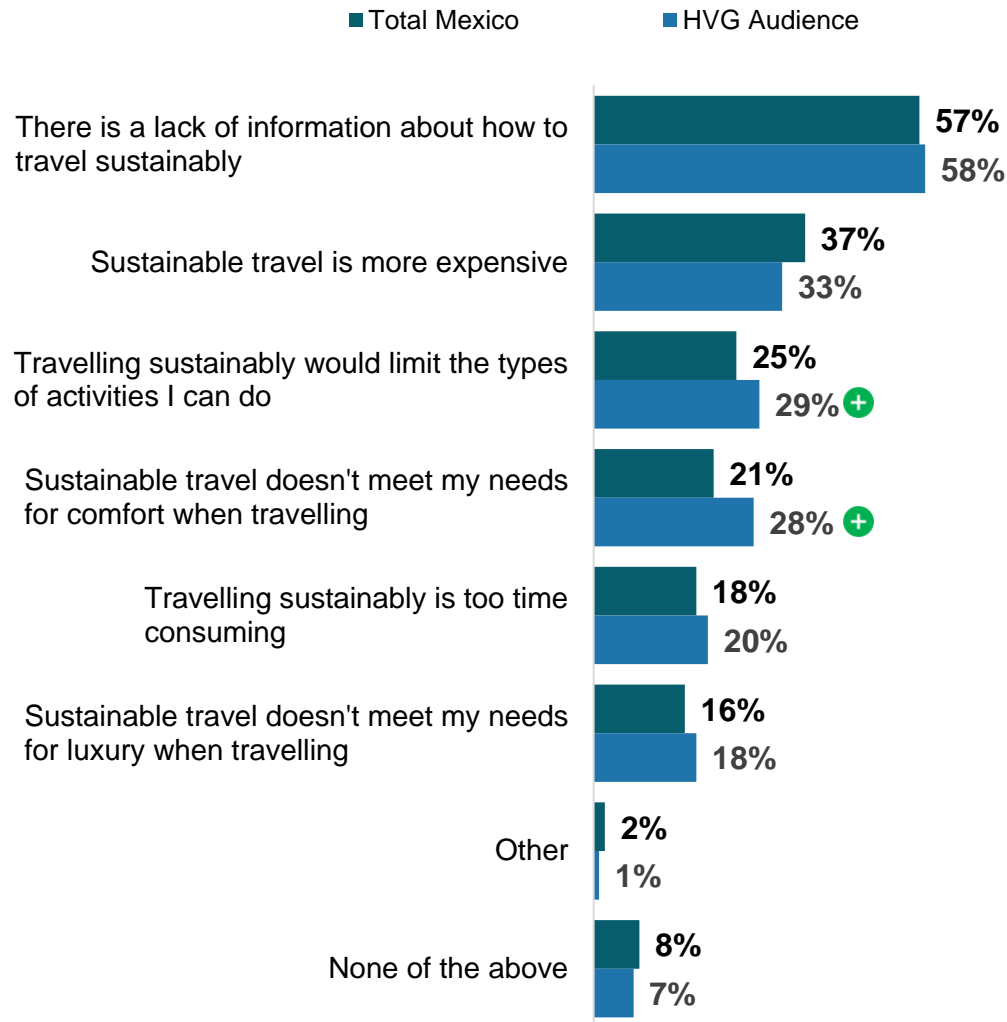
Top 3 Most Important Sustainability Efforts



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

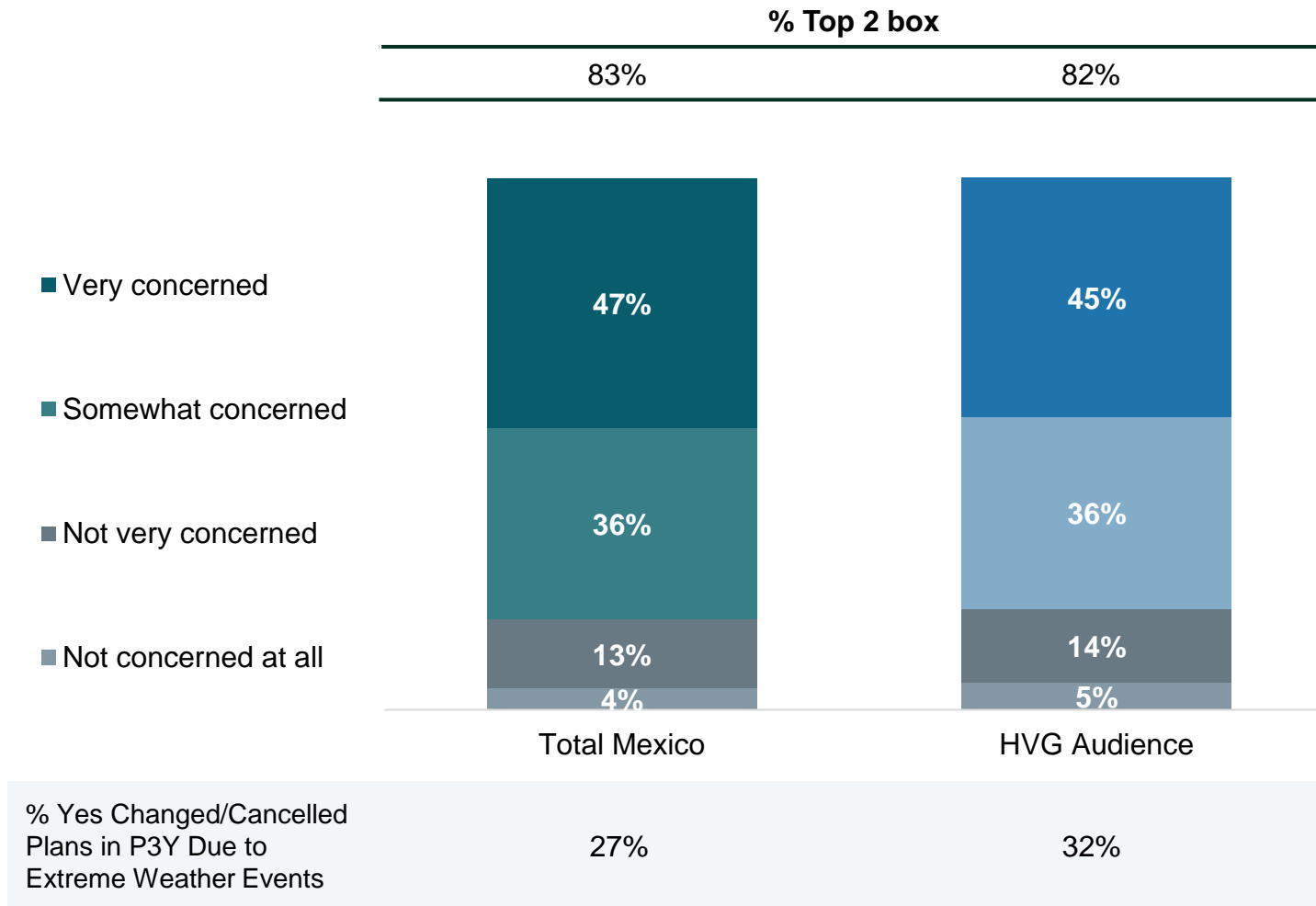


Sustainable Travel Description

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”.



Impact of Extreme Weather Events on Travel Plans

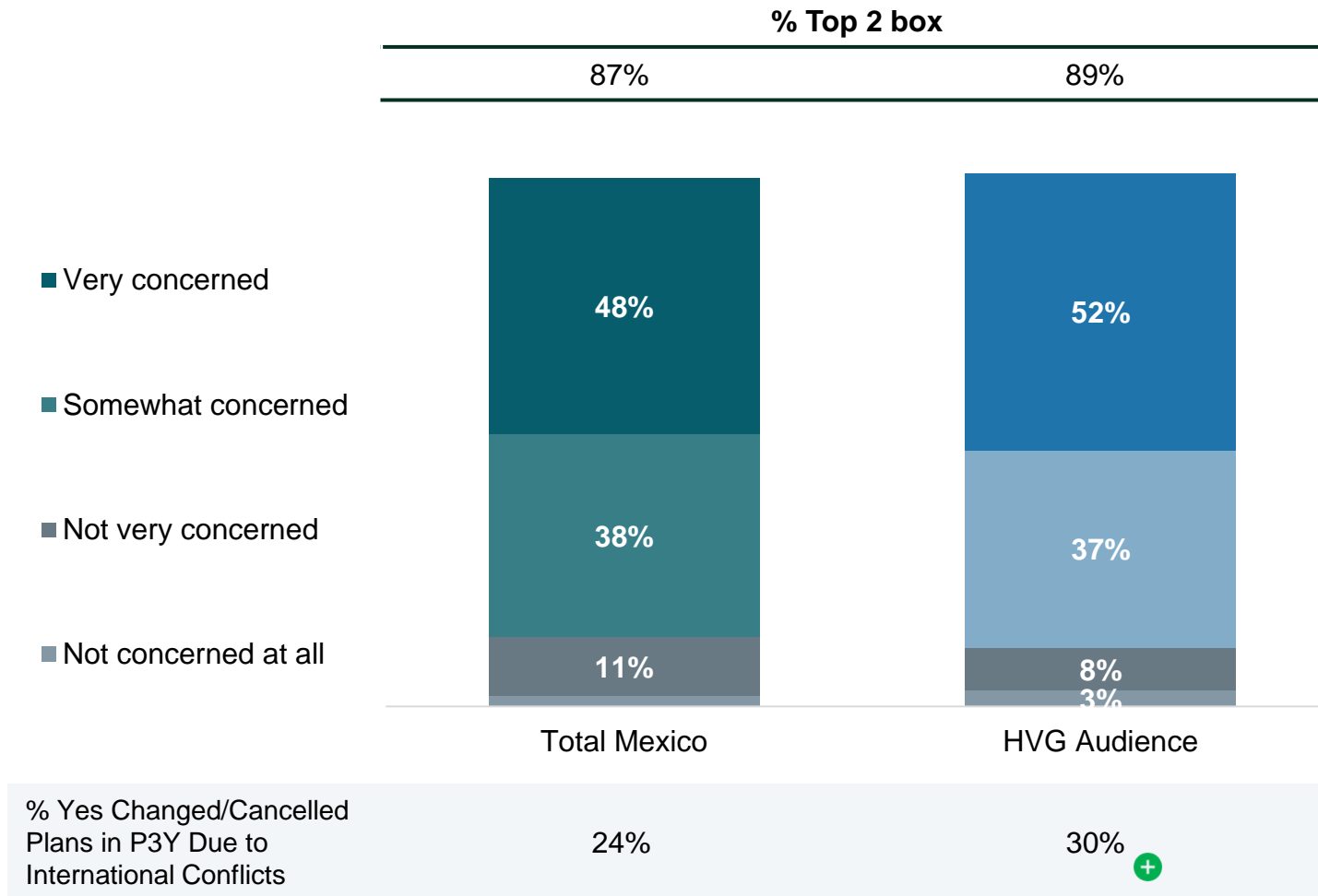


Extreme Weather Events Description

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.



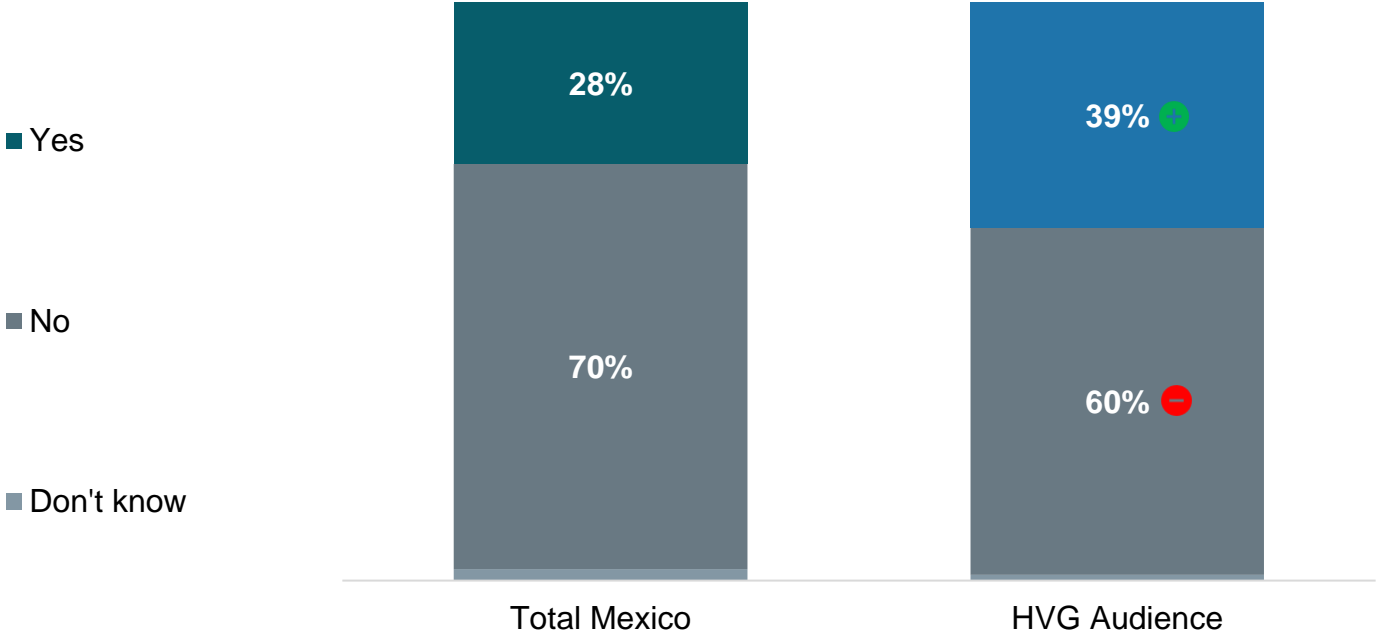
Impact of International Conflicts & Unrest on Travel Plans



International Conflicts Description

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

Usage of AI Tools to Plan Trips





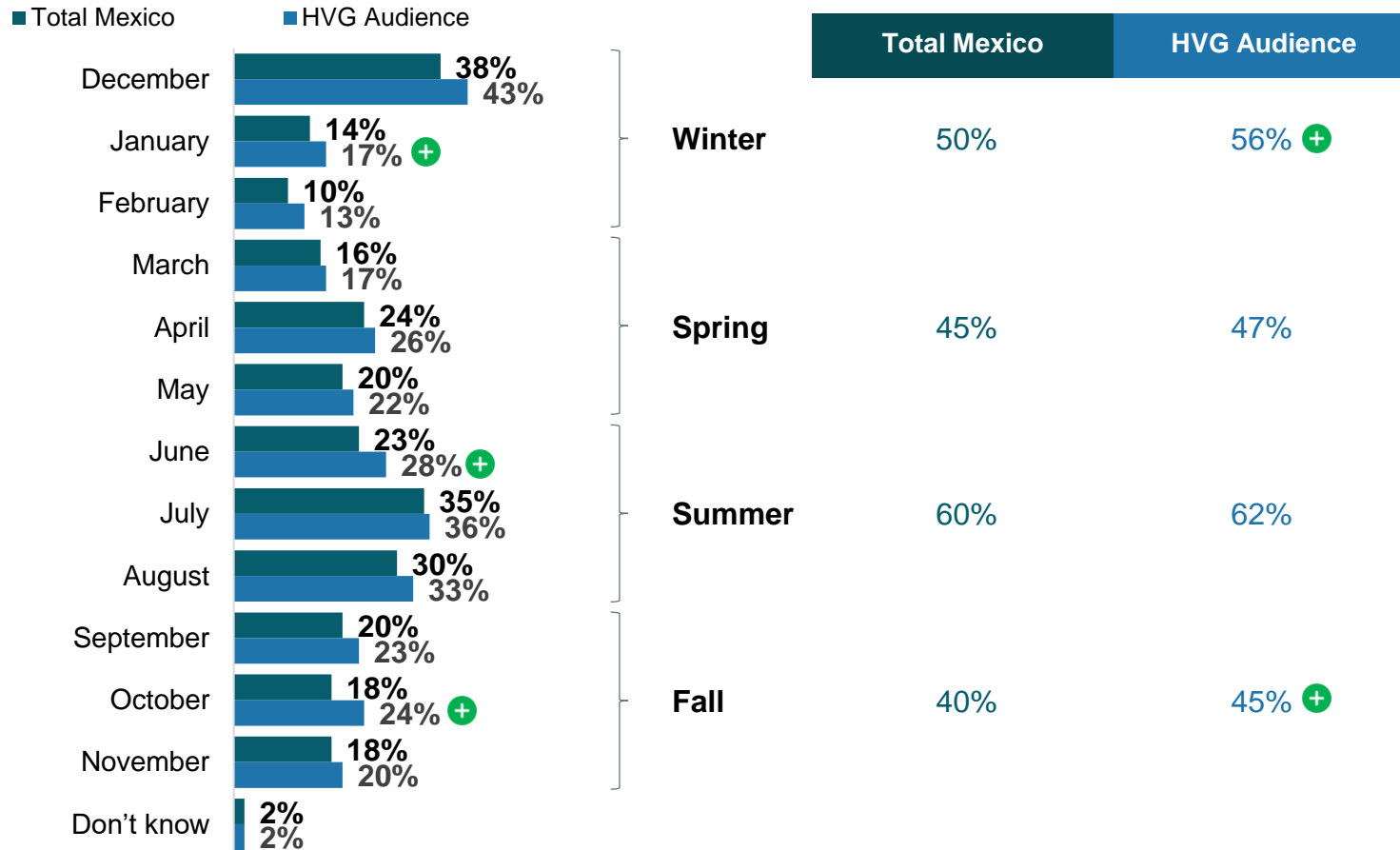
Seasonal Travel



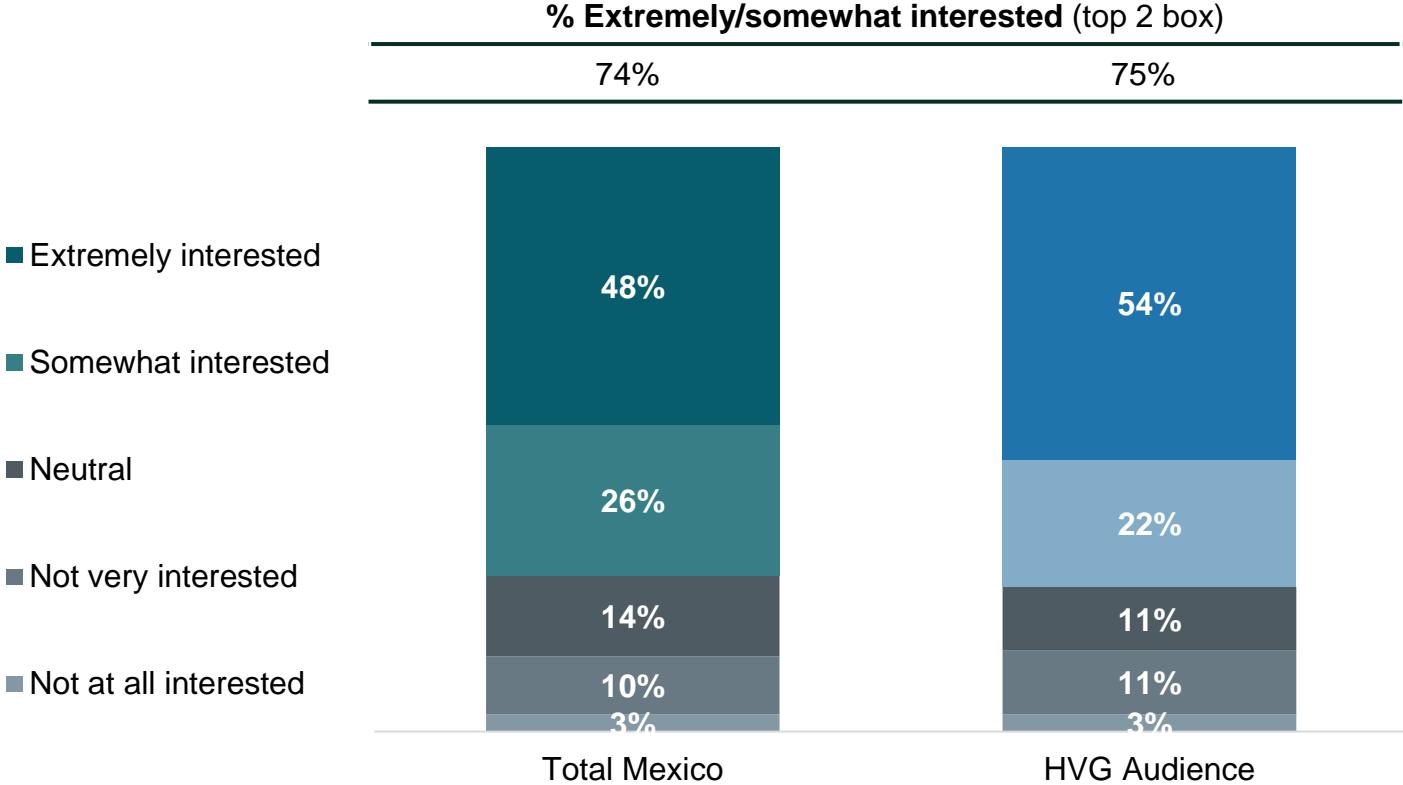
Yellowknife
Northwest Territories



Preferred Time of Year for Holiday Trips



Interest in Winter Holidays

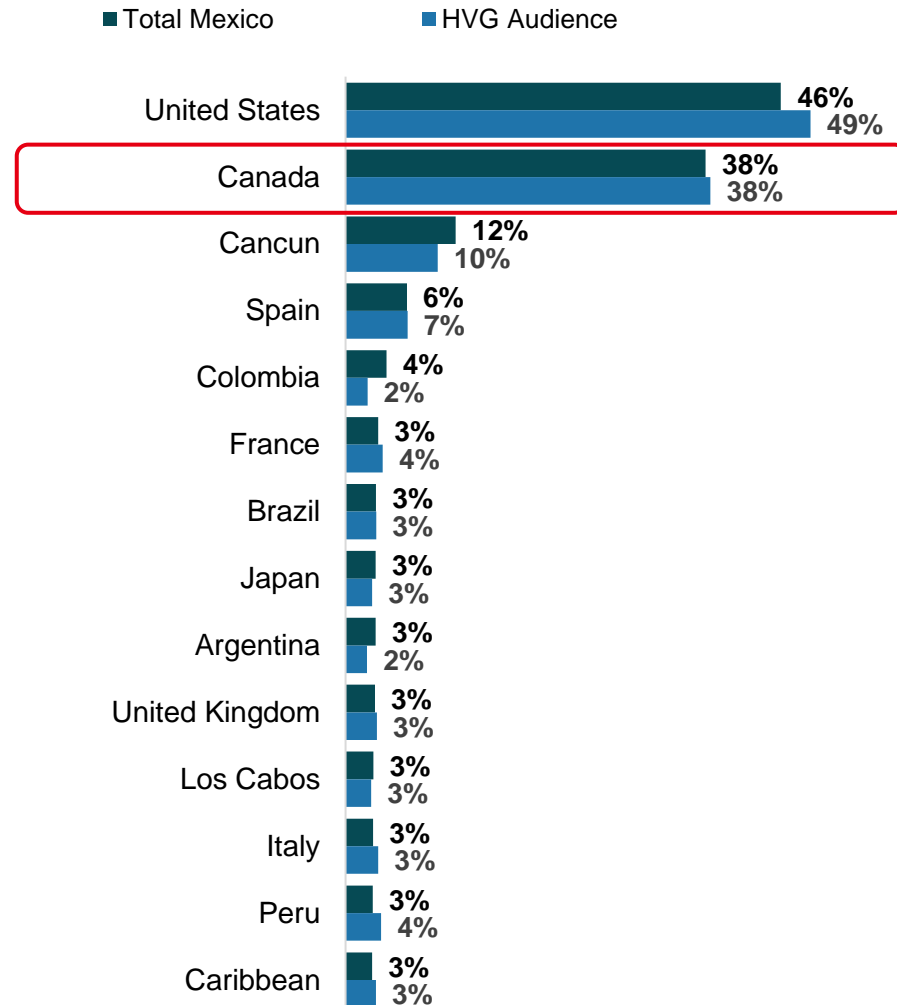


Winter Season Description

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.

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

Unaided Winter Destinations



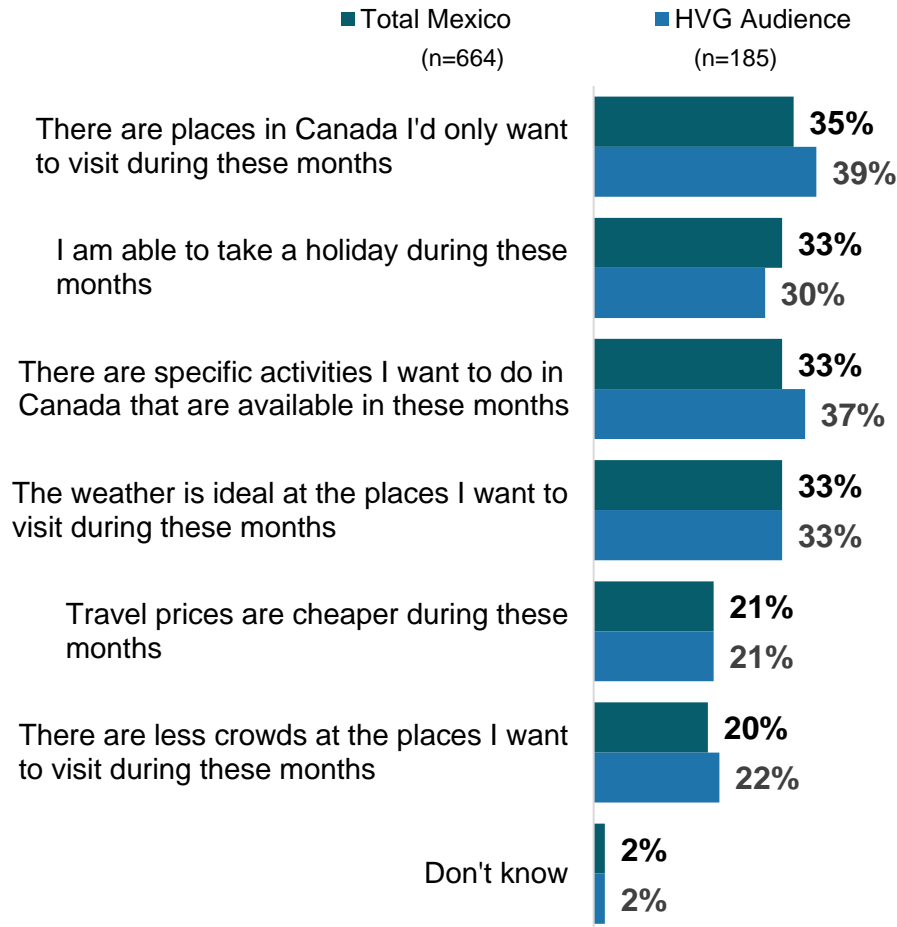
Winter Season Description

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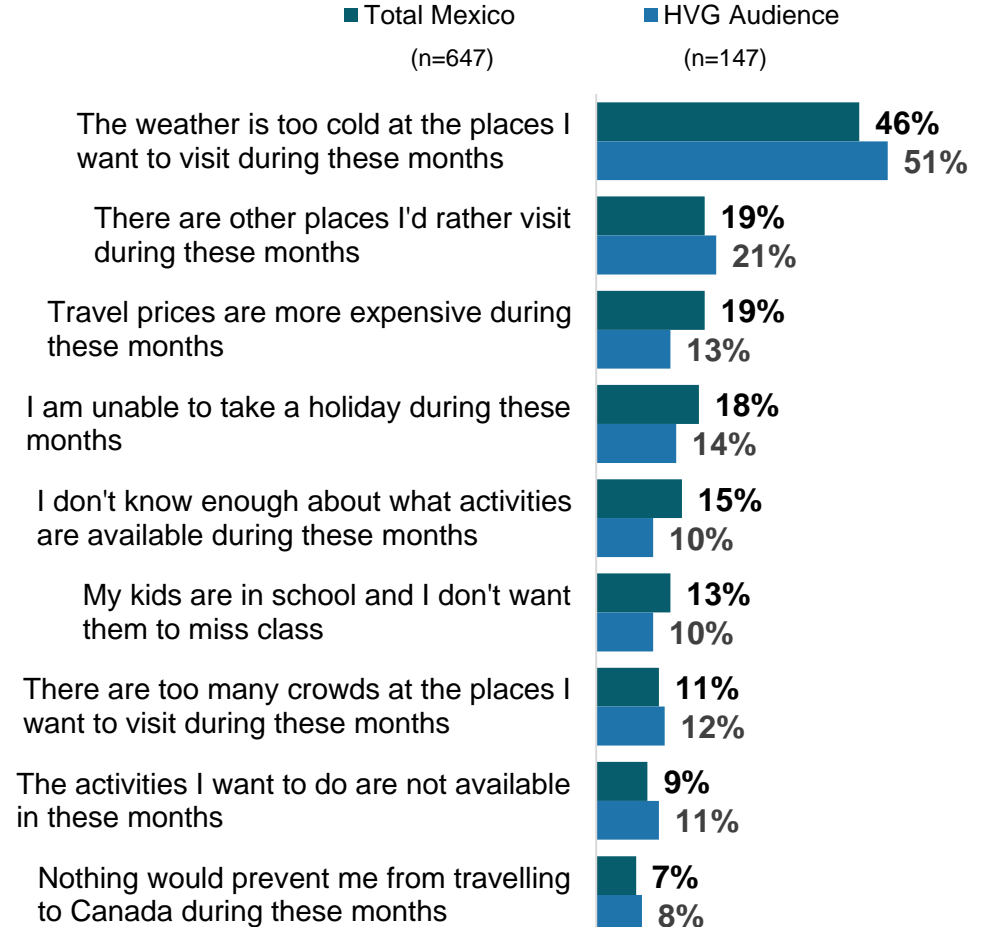
Motivators & Barriers for Winter Travel to Canada



Motivators for Winter Travel



Barriers for Winter Travel



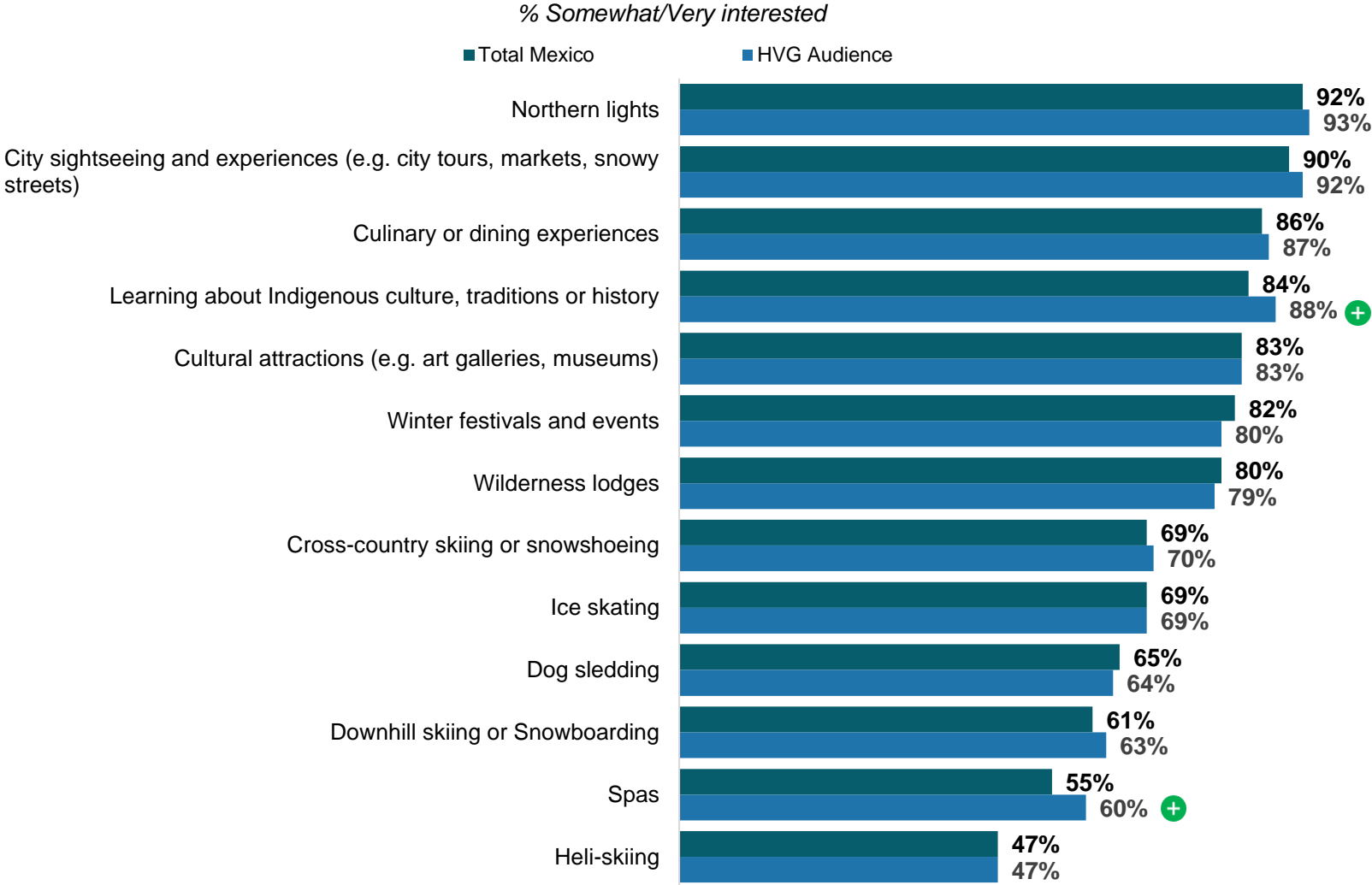
Base: Those in the dream to purchase stages of the path to purchase for Canada and considering visiting Canada or any province/territory in December, January or February E8a. You indicated earlier that you are considering taking a holiday to **Canada** during the months of December, January and/or February...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

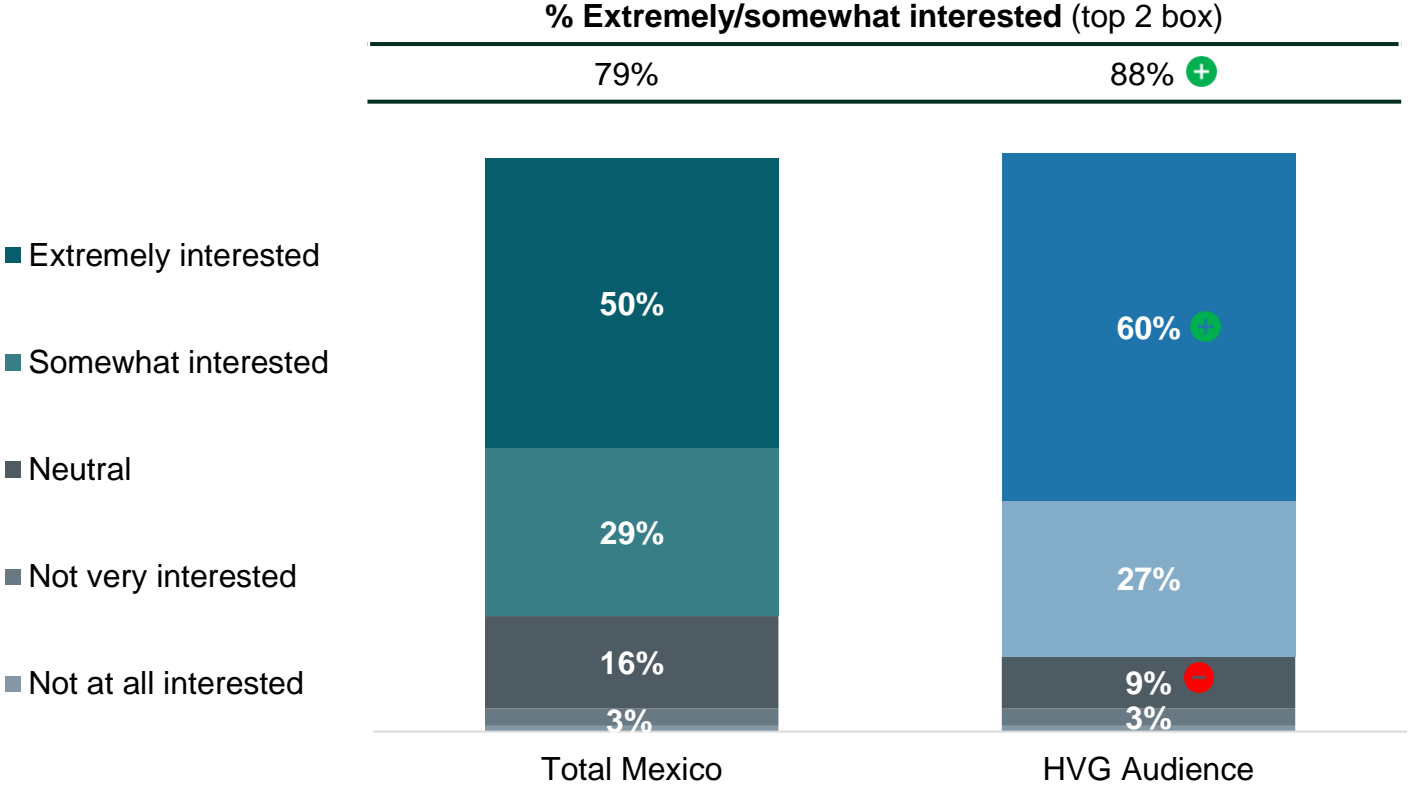
+ / - = significantly higher/lower result (vs. Total)



Interest in Winter Activities in Canada



Interest in Fall Holidays

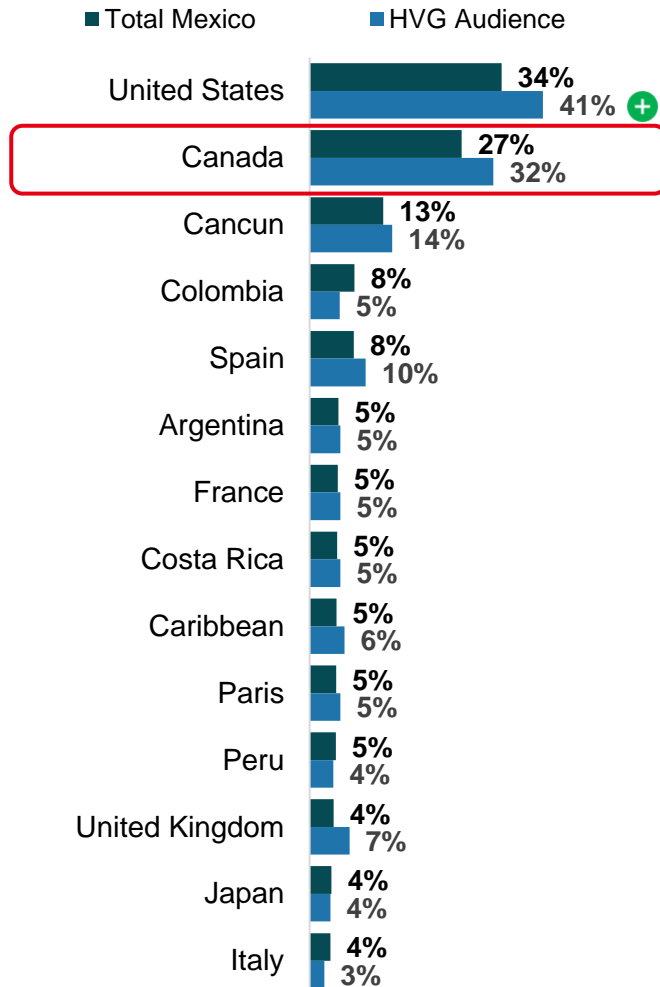


Autumn Season Description

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.

59 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) (n=795); HVG (n=188)
 D3. In general, how interested are you in taking a holiday trip to a destination during its autumn season?

Unaided Fall Destinations



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.



Motivators & Barriers for Fall Travel to Canada



Motivators for Fall Travel



Barriers for Fall Travel

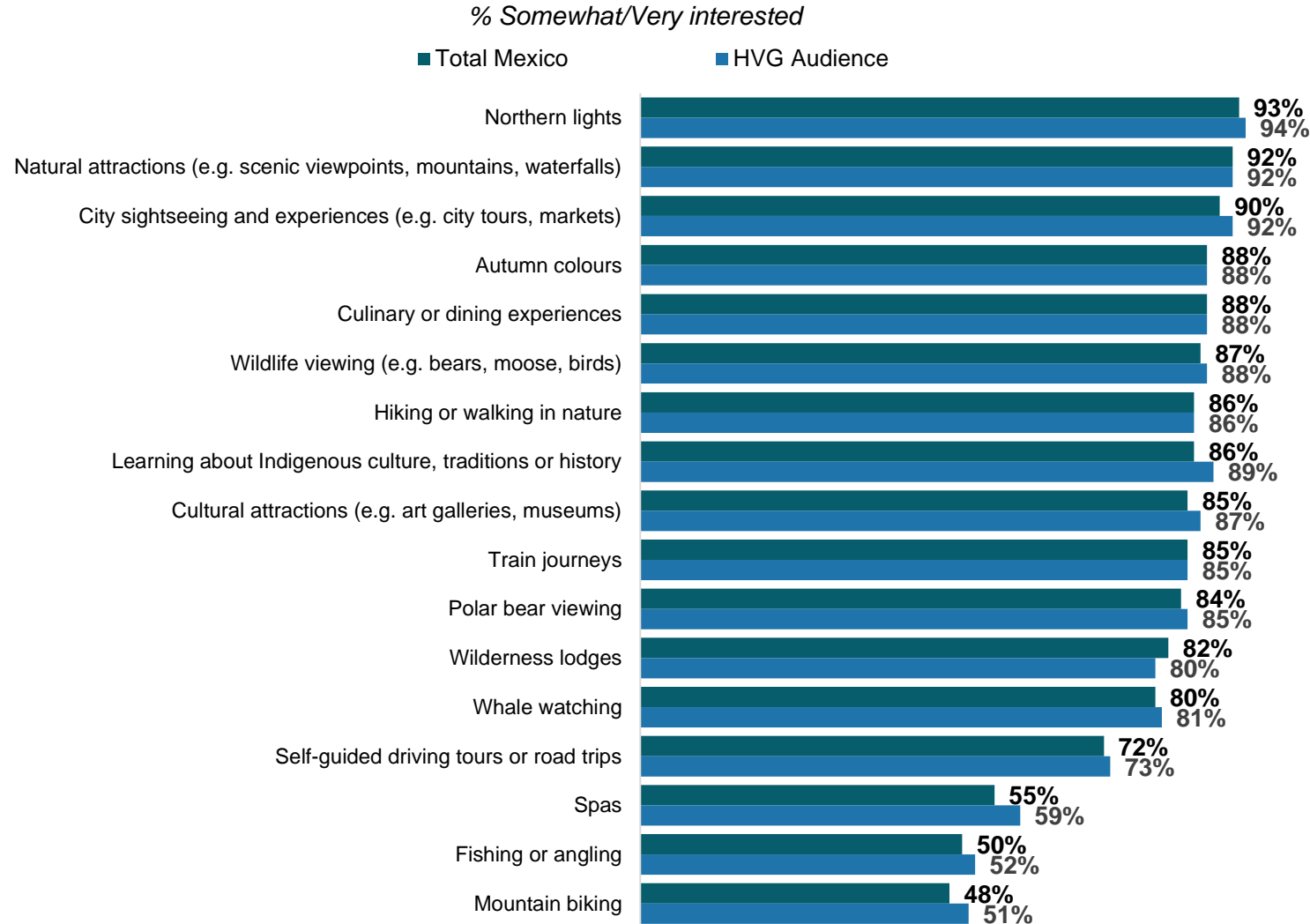


Base: Those in the dream to purchase stages of the path to purchase for Canada and considering visiting Canada or any province/territory in September, October or November E6a. You indicated earlier that you are considering taking a holiday to **Canada** during the months of September, October and/or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



Interest in Fall Activities in Canada

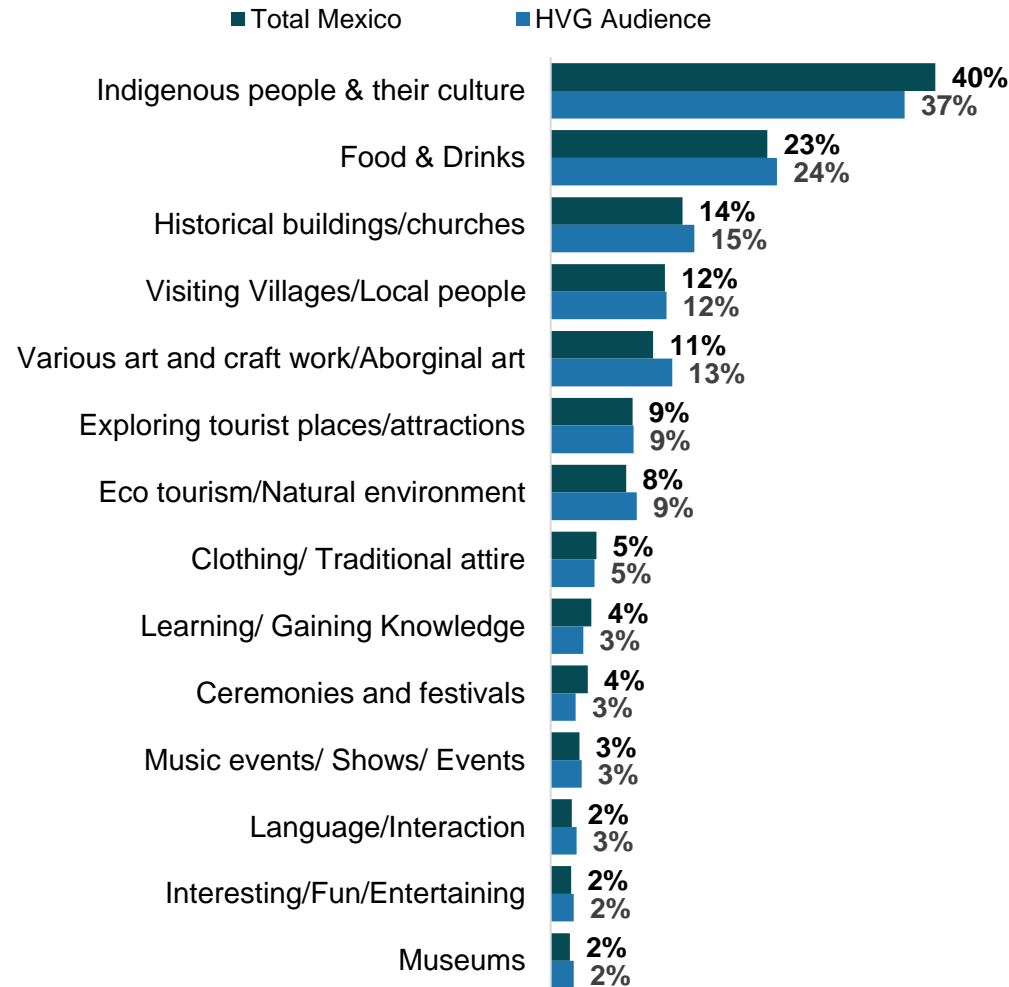




Indigenous Tourism



Unaided Mentions – Indigenous Cultural & Tourism Activities

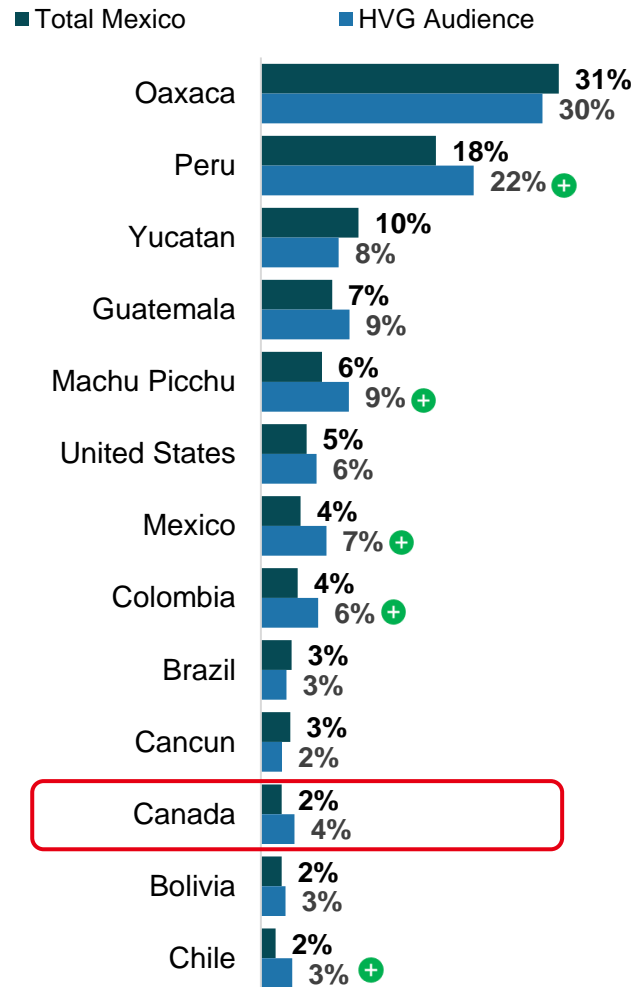


Indigenous Peoples Description

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.



Unaided Indigenous Tourism Destinations

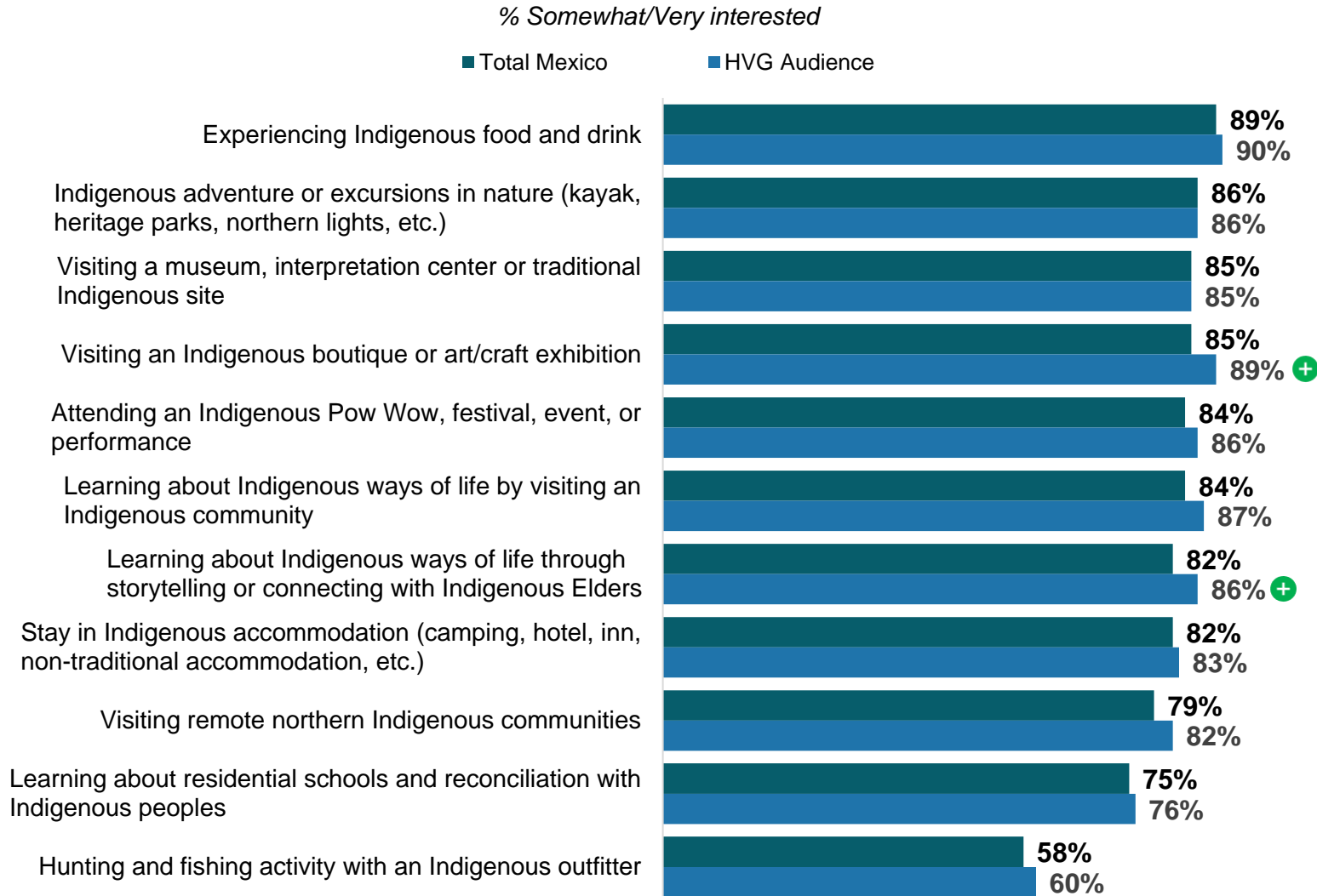


Indigenous Peoples Description

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



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.





Most Recent Trip



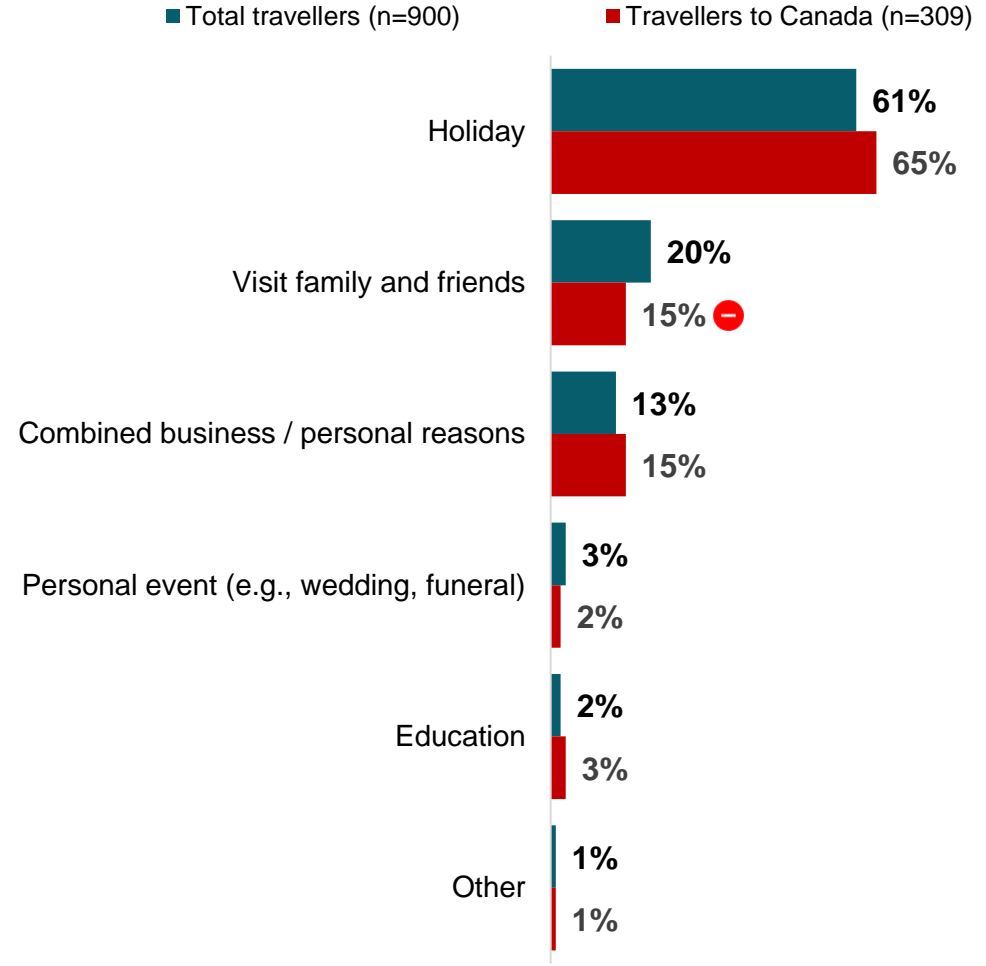
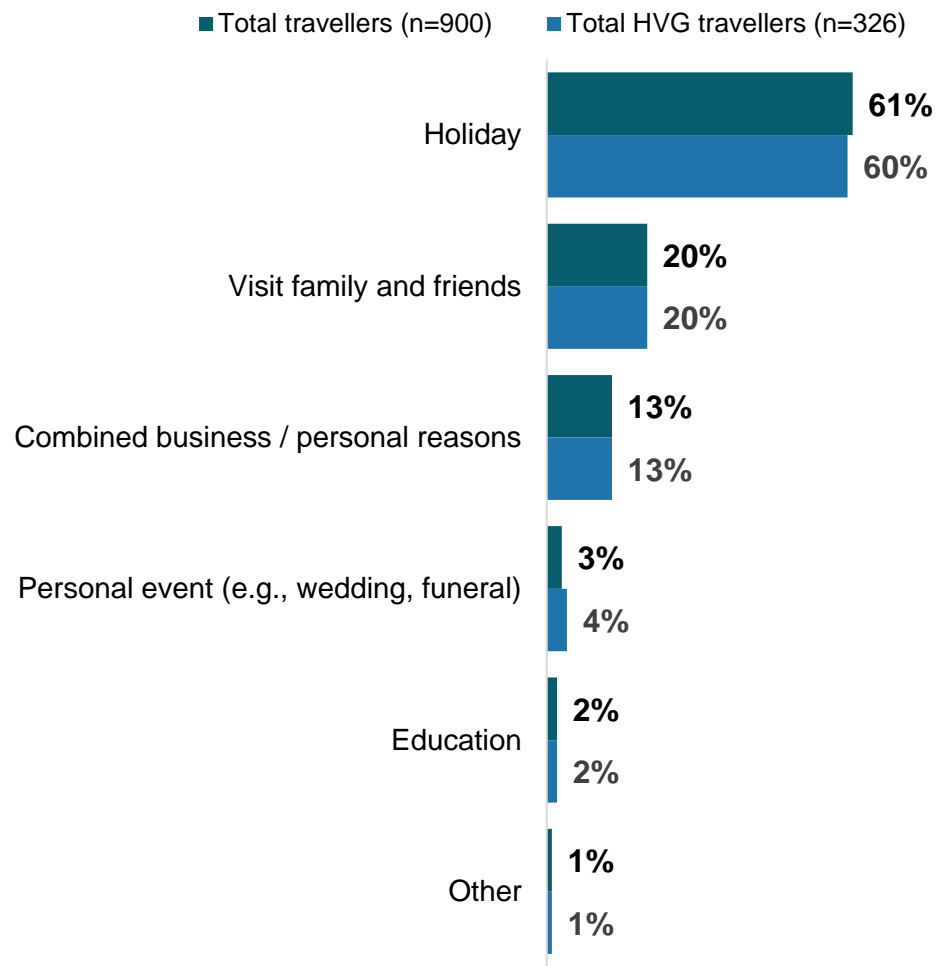
Lake Louise
Alberta



Main Purpose of Recent Trip

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

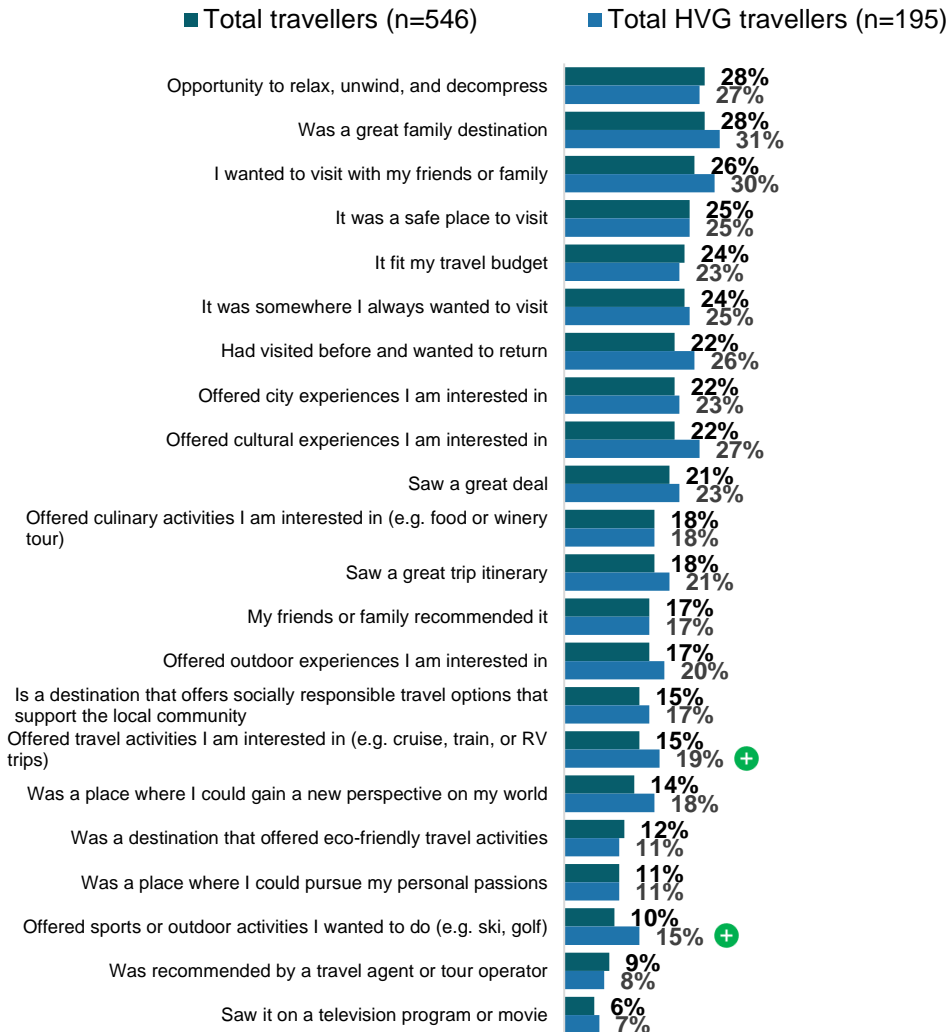
Total Travellers to Any Destination vs. Total Travellers to Canada



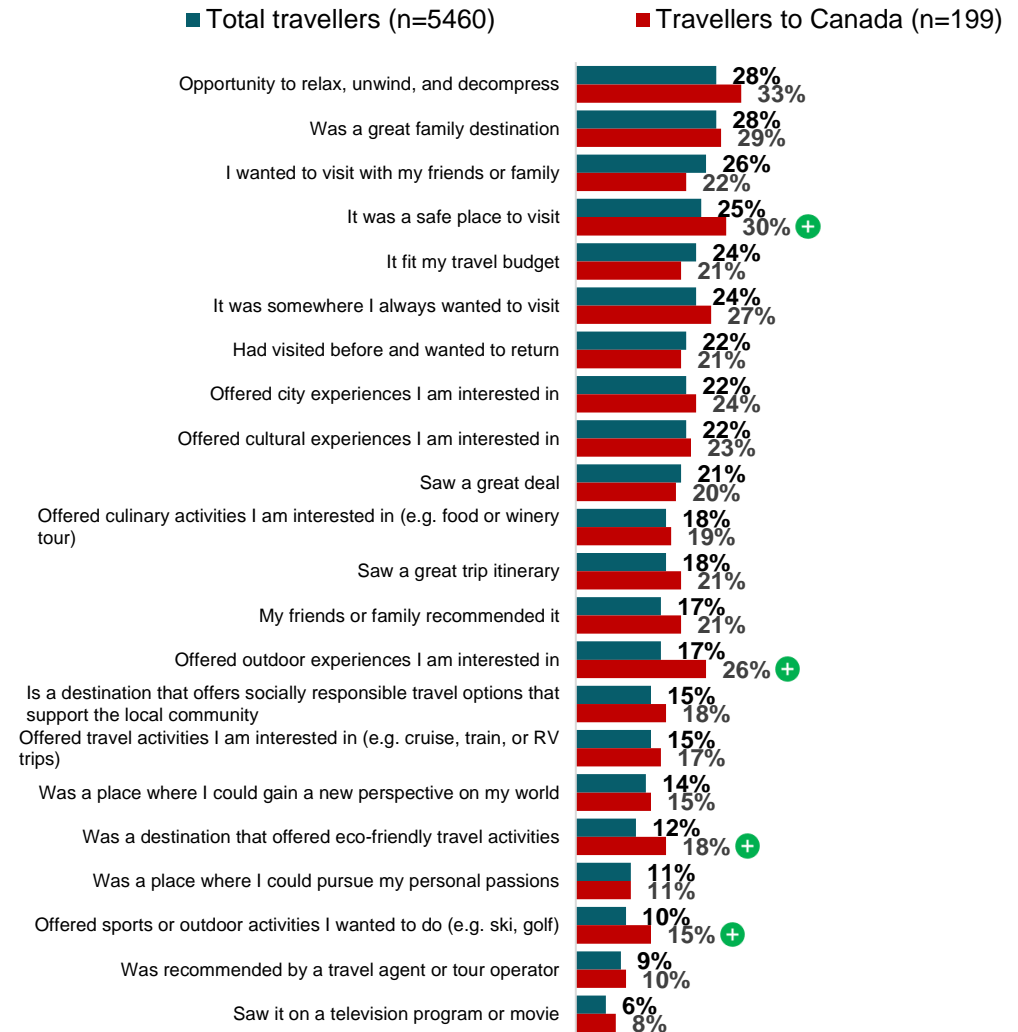
Factors in Choosing Destination for Recent Trip



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



Total Travellers to Any Destination vs. Total Travellers to Canada



Nights Spent During Recent Trip

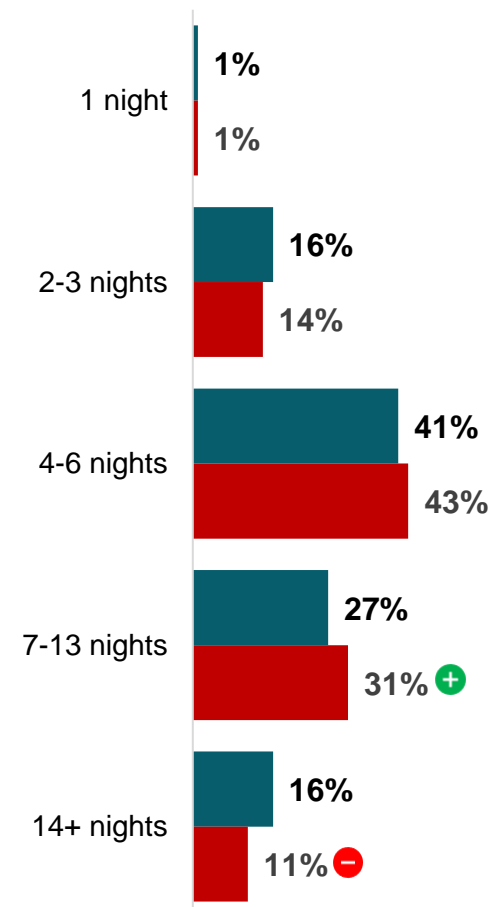
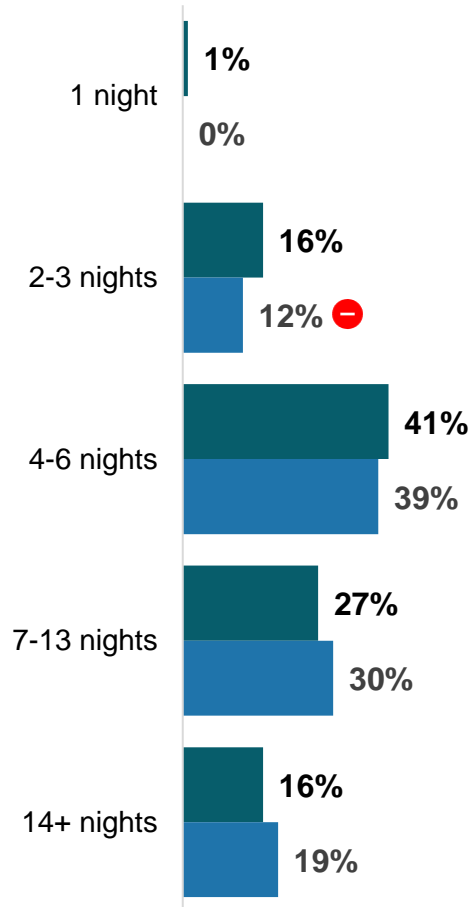


Total Travellers to Any Destination vs. HVG Travellers to Any Destination

Total Travellers to Any Destination vs. Total Travellers to Canada

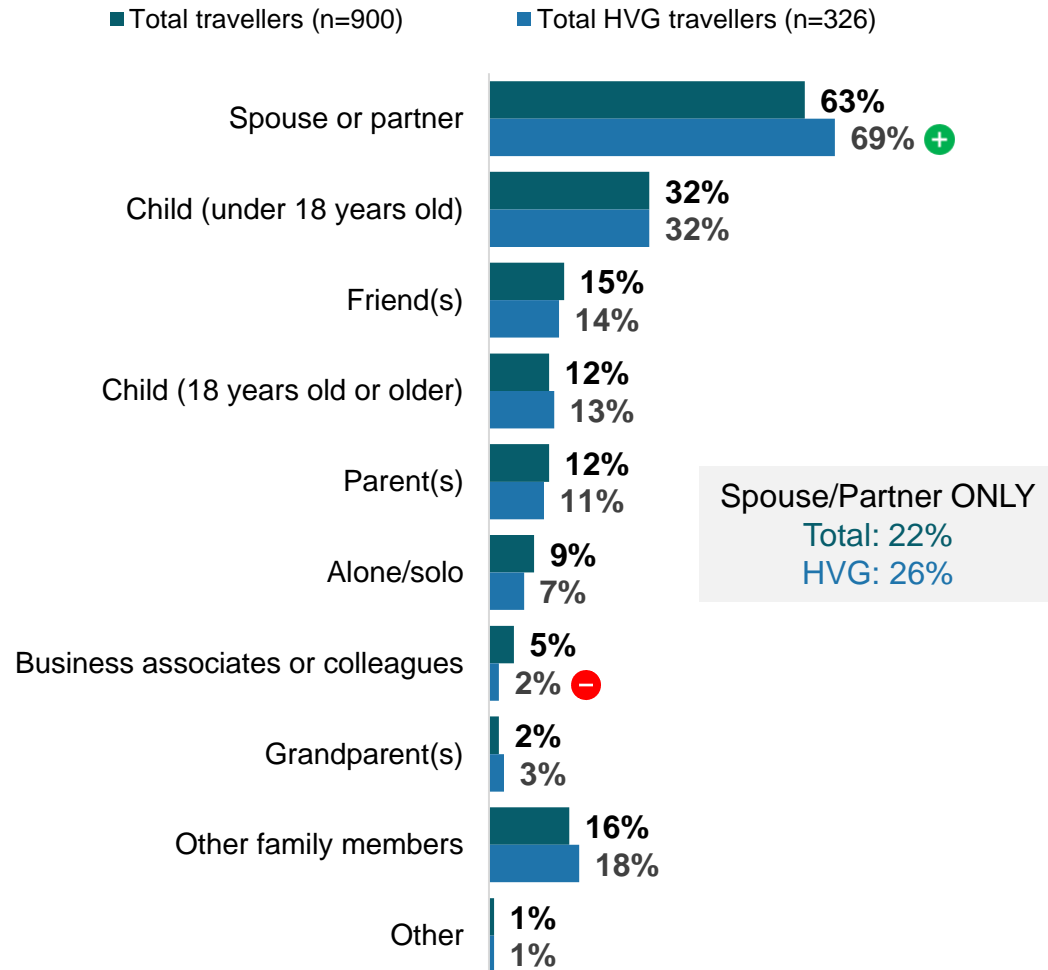
■ Total travellers (n=900) ■ Total HVG travellers (n=326)

■ Total travellers (n=900) ■ Travellers to Canada (n=309)

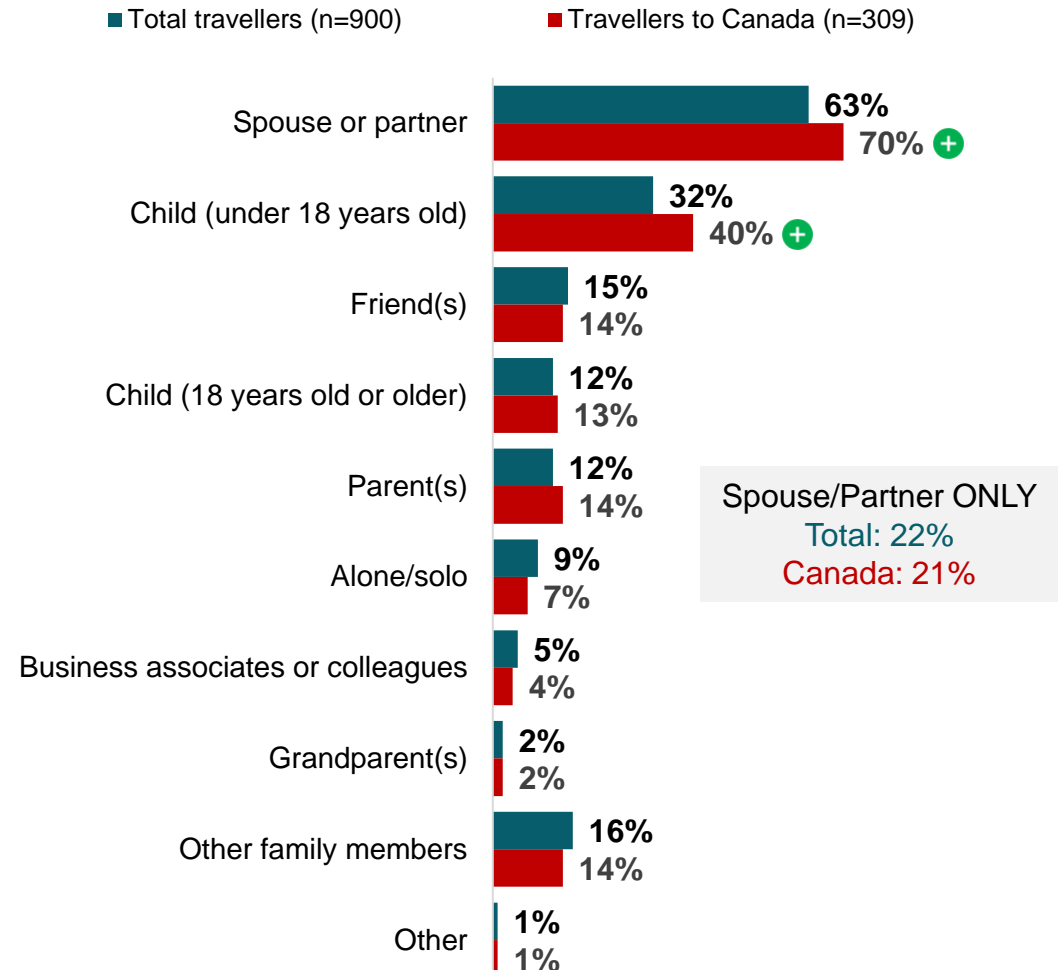


Travel Party of Recent Trip

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



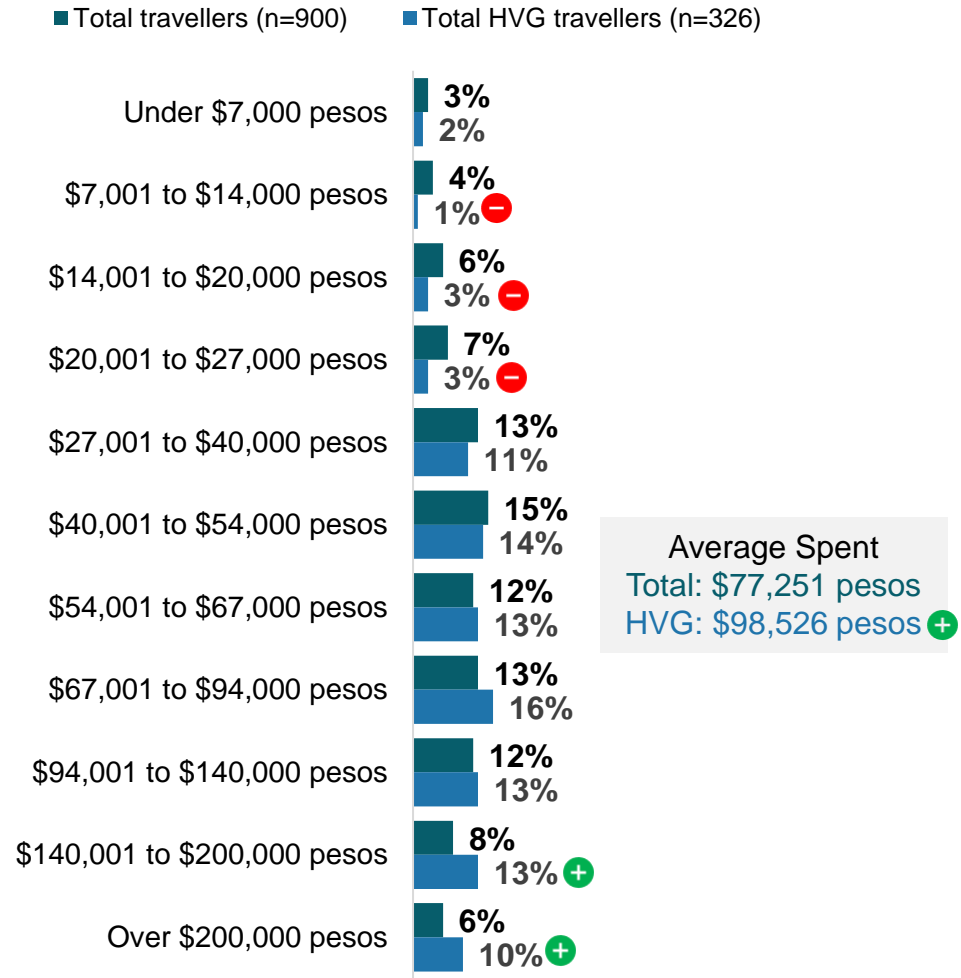
Total Travellers to Any Destination vs. Total Travellers to Canada



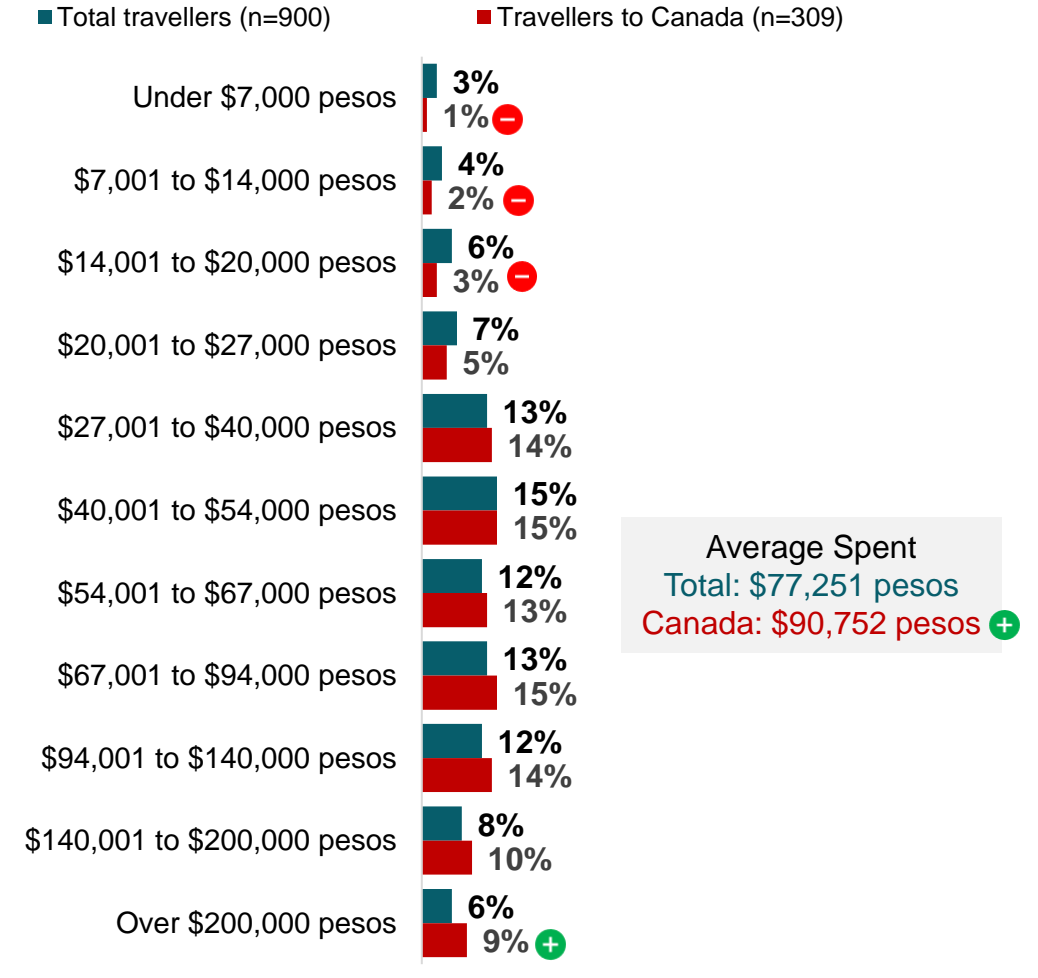
Amount Spent for Recent Trip



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



Total Travellers to Any Destination vs. Total Travellers to Canada

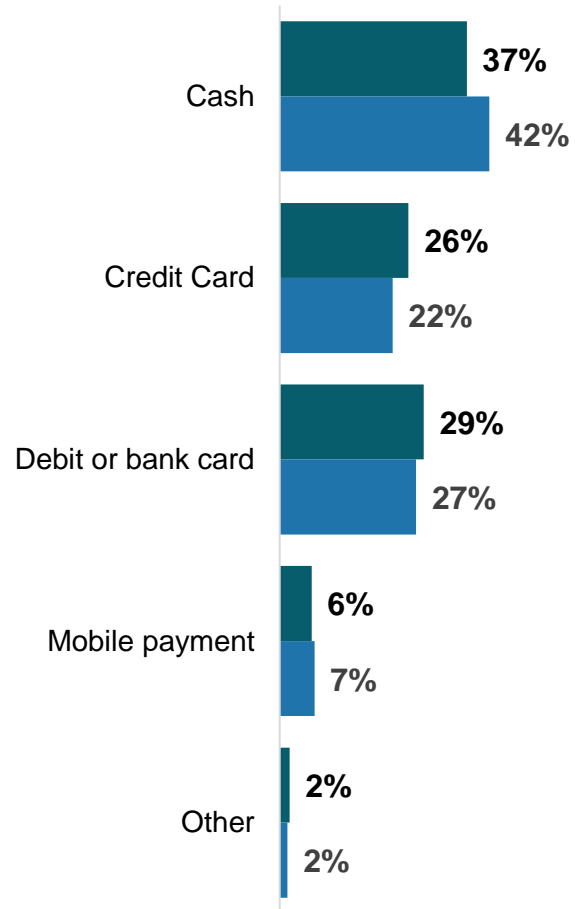


Payment Methods for Recent Trip



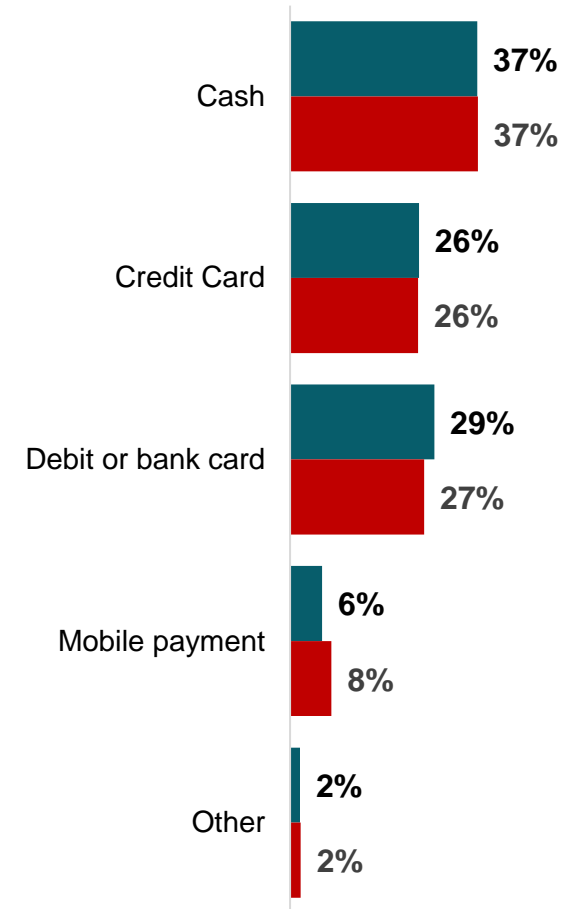
Total Travellers to Any Destination vs. HVG Travellers to Any Destination

■ Total travellers (n=900) ■ Total HVG travellers (n=326)



Total Travellers to Any Destination vs. Total Travellers to Canada

■ Total travellers (n=900) ■ Travellers to Canada (n=309)

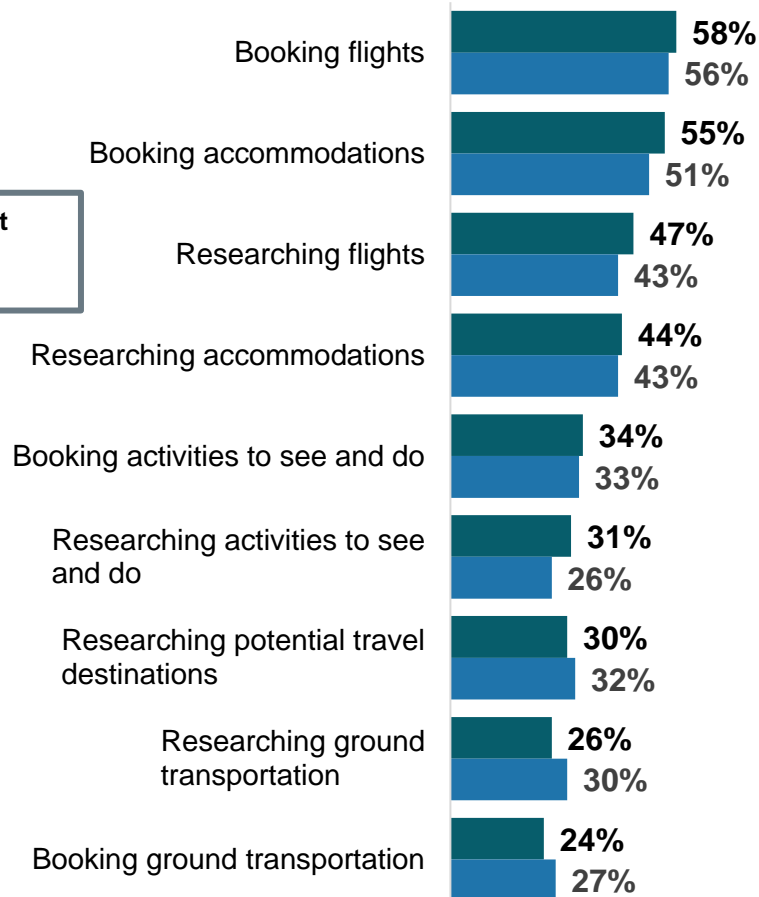


Travel Agents/Tour Operator Usage For Recent Trip



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

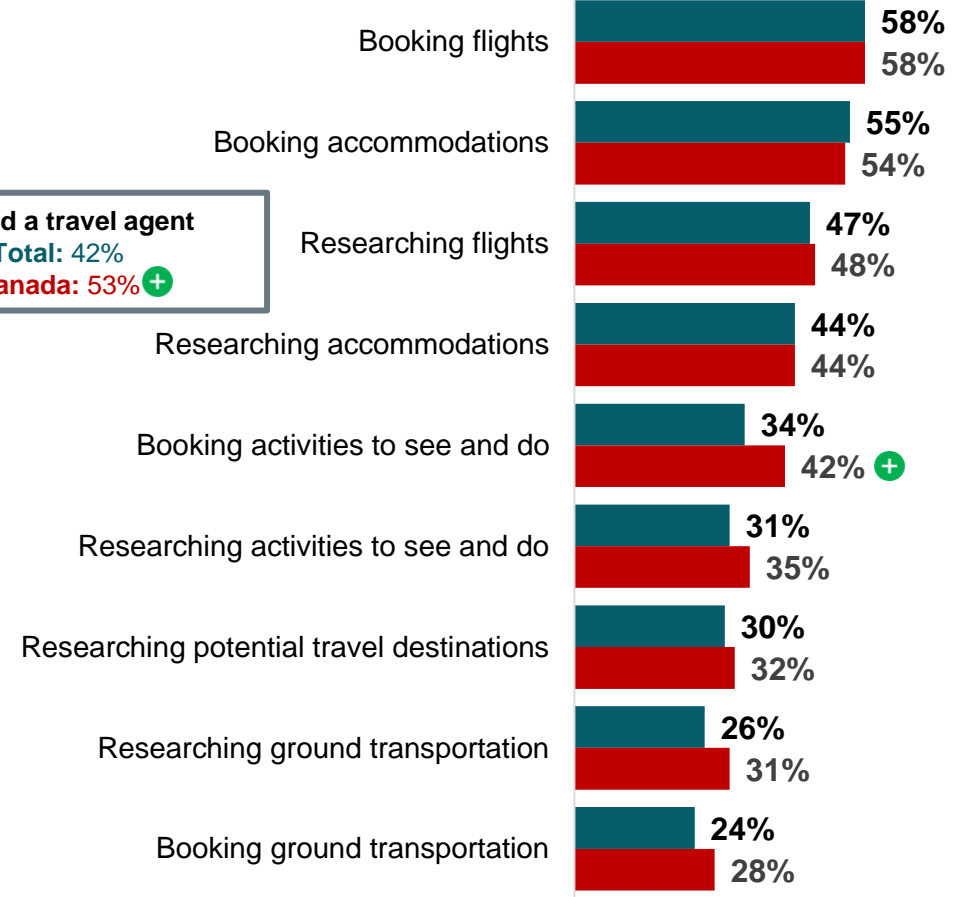
■ Total travellers (n=387) ■ Total HVG travellers (n=155)



% Used a travel agent
Total: 42%
HVG: 44%

Total Travellers to Any Destination vs. Total Travellers to Canada

■ Total travellers (n=387) ■ Travellers to Canada (n=173)



% Used a travel agent
Total: 42%
Canada: 53% +

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?

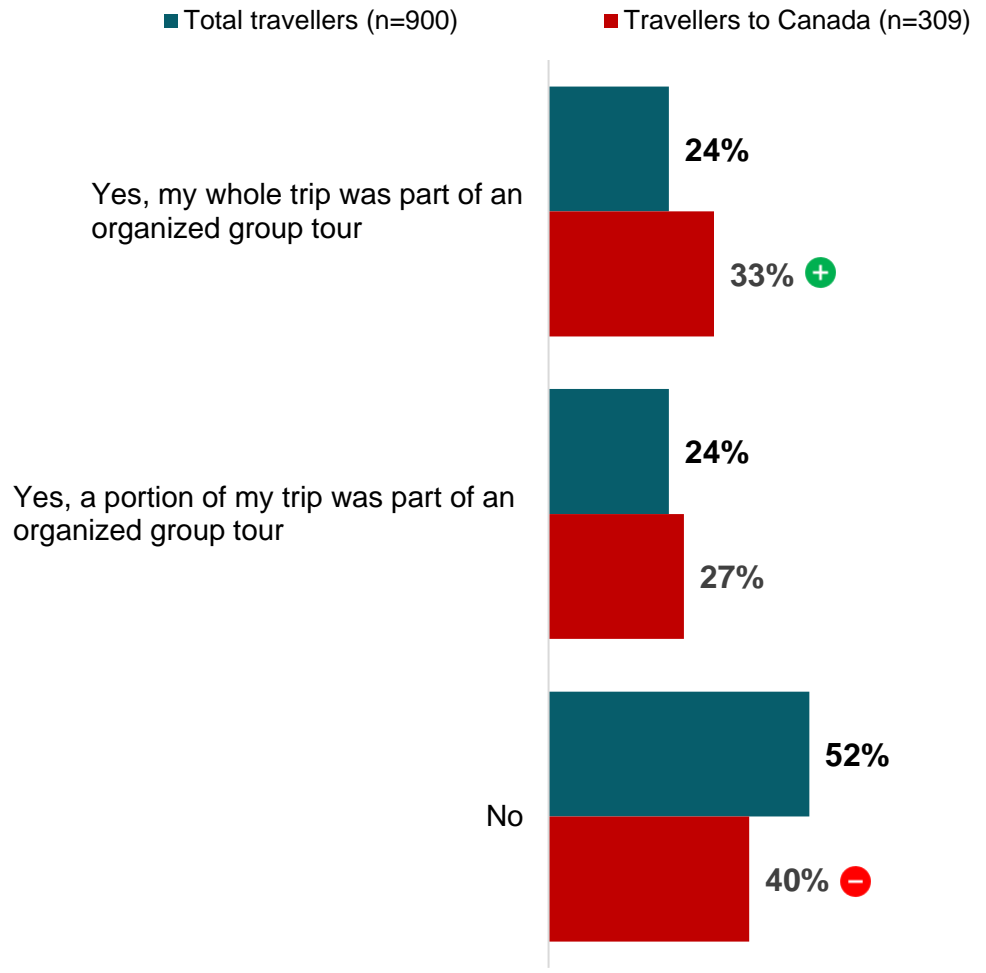
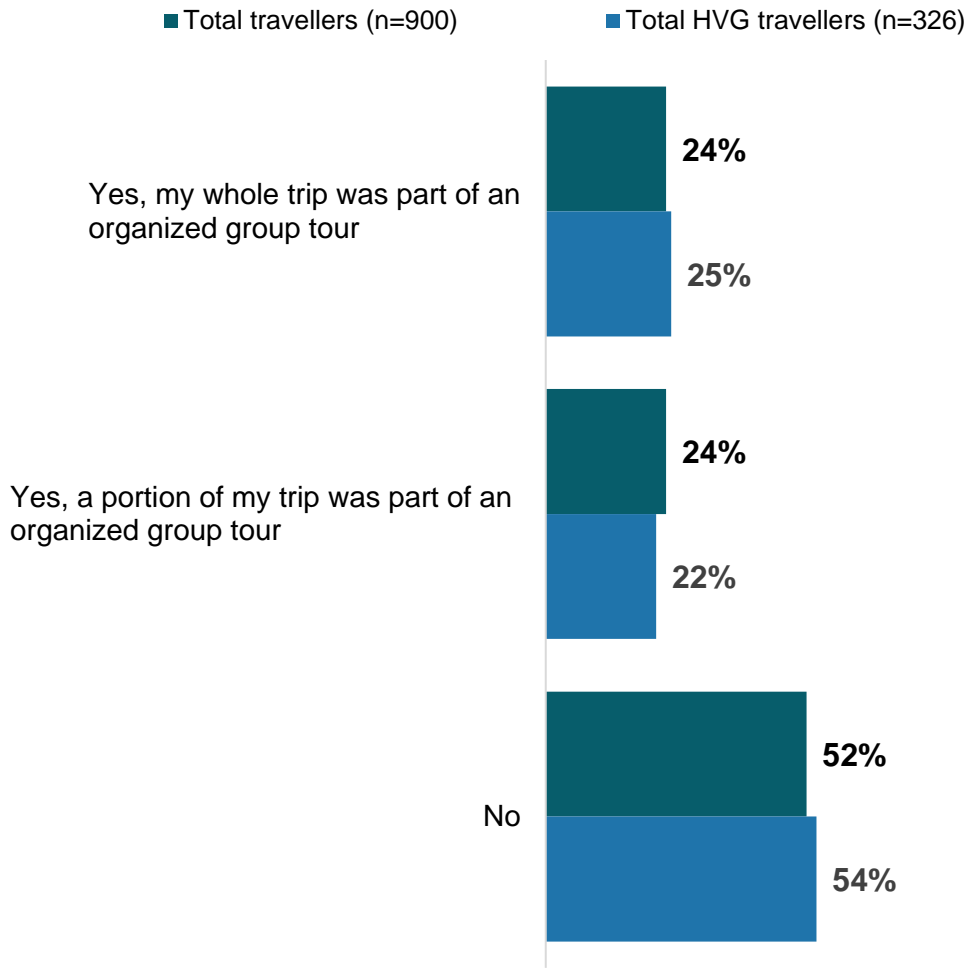
+ / - = significantly higher/lower result (vs. Total)



Organized Group Tour Usage For Recent Trip

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

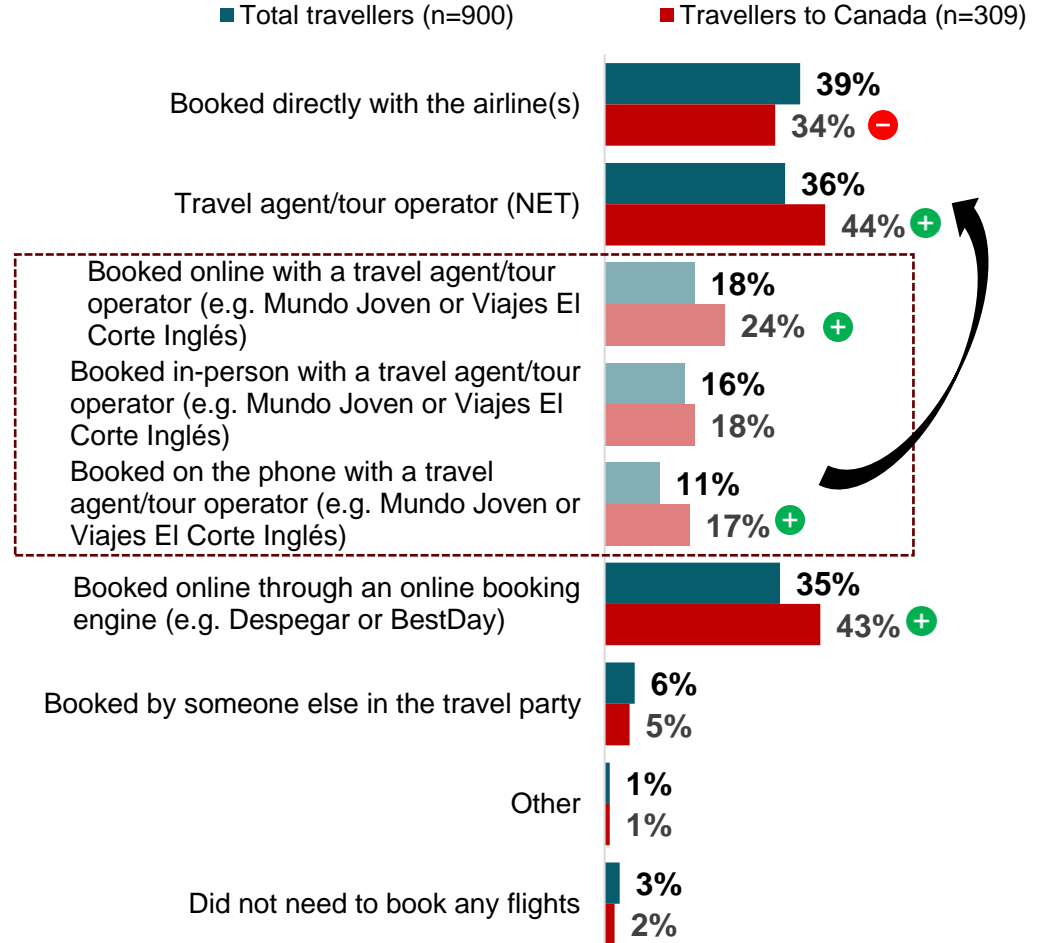
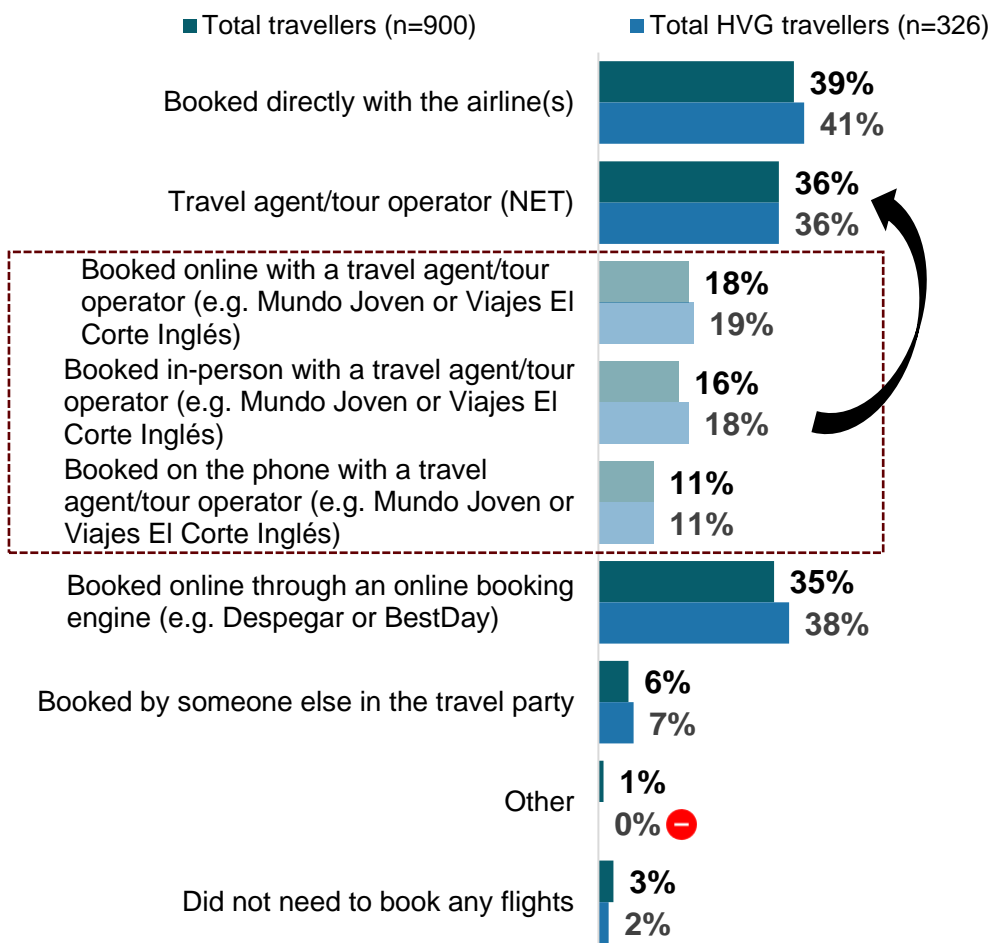
Total Travellers to Any Destination vs. Total Travellers to Canada



Booking Flights For Recent Trip

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

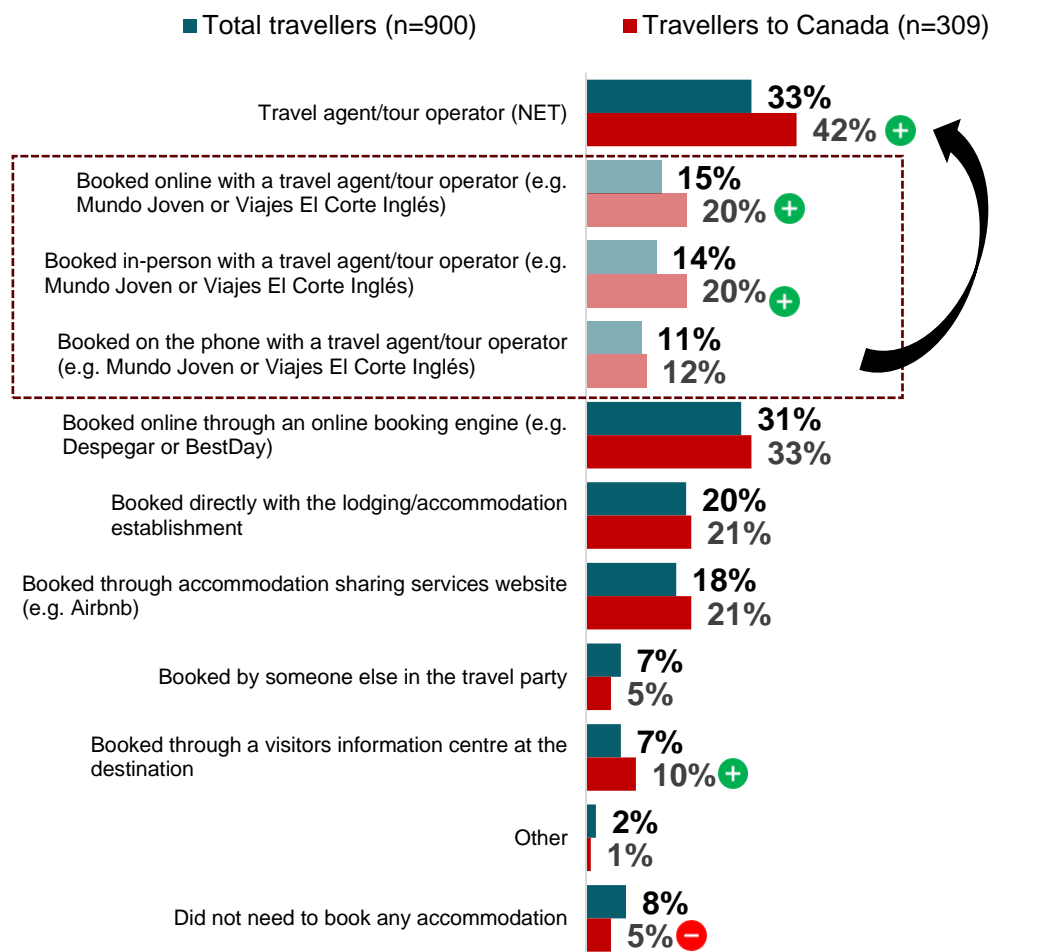
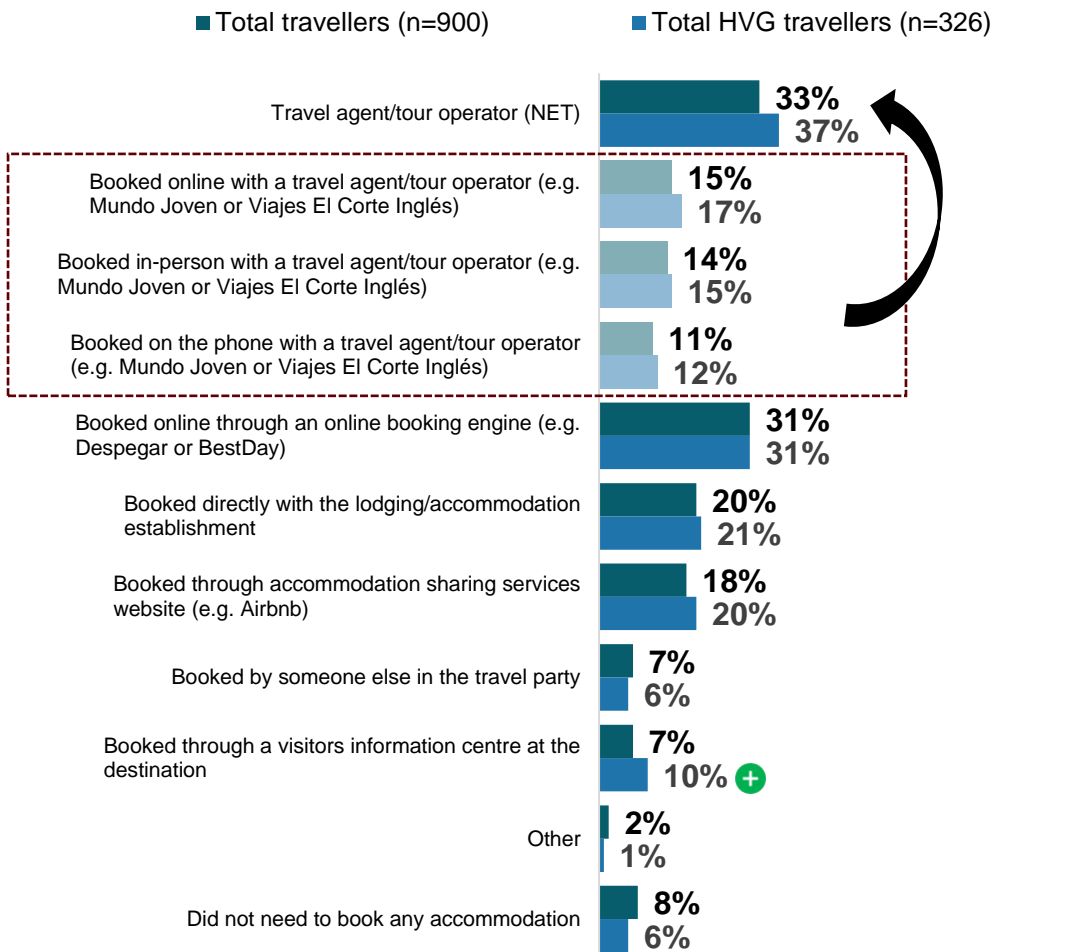
Total Travellers to Any Destination vs. Total Travellers to Canada



Booking Accommodations For Recent Trip

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

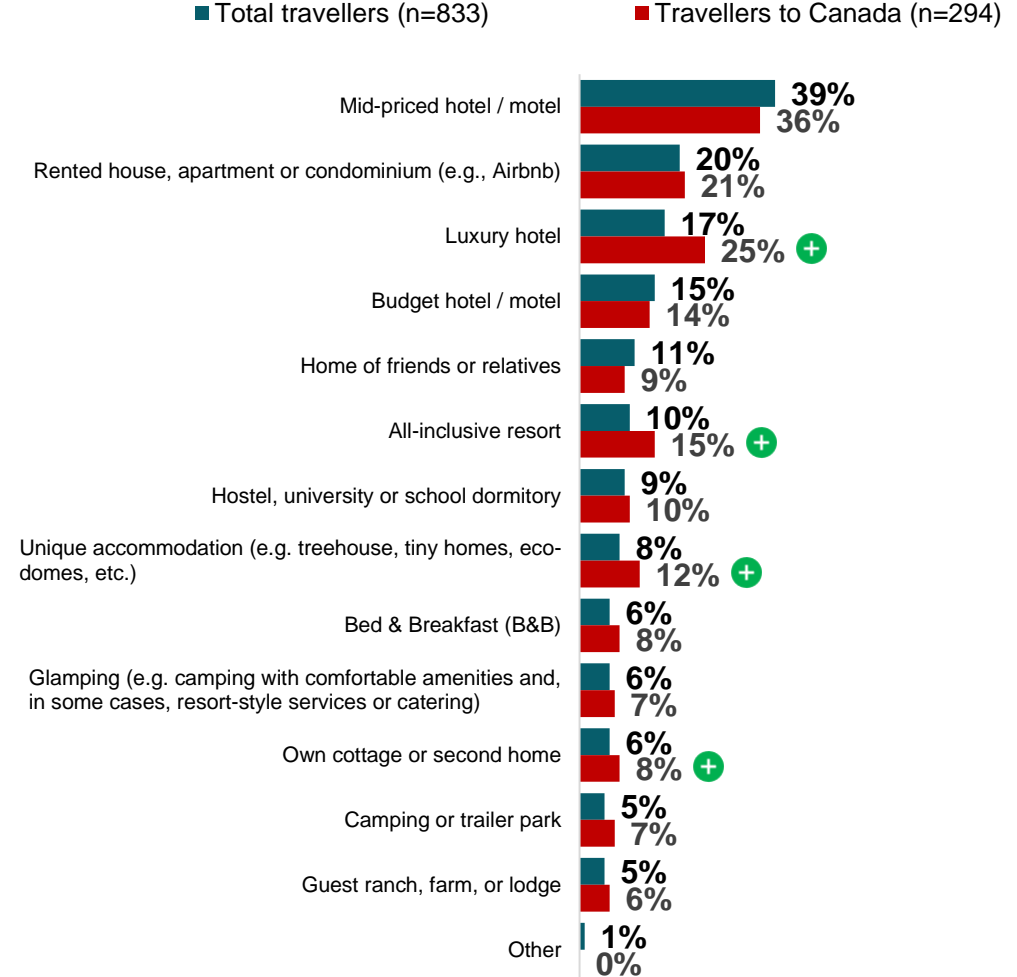
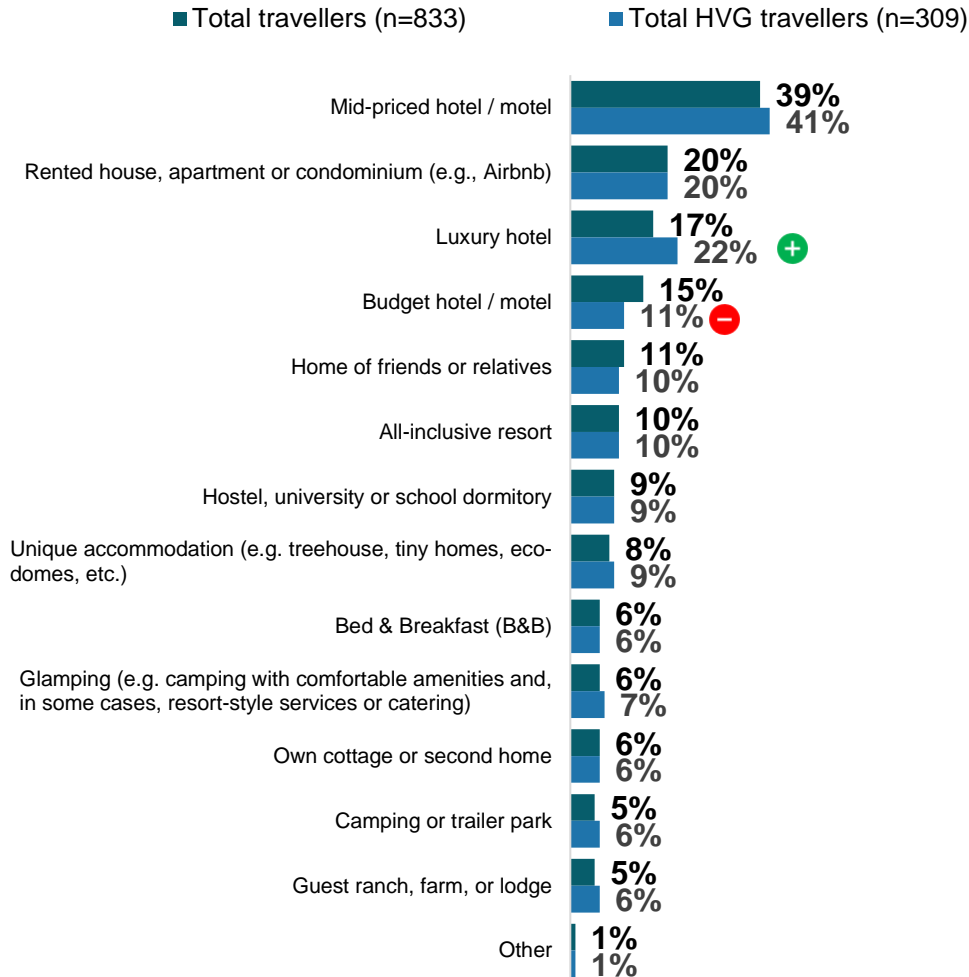
Total Travellers to Any Destination vs. Total Travellers to Canada



Type of Accommodations For Recent Trip

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

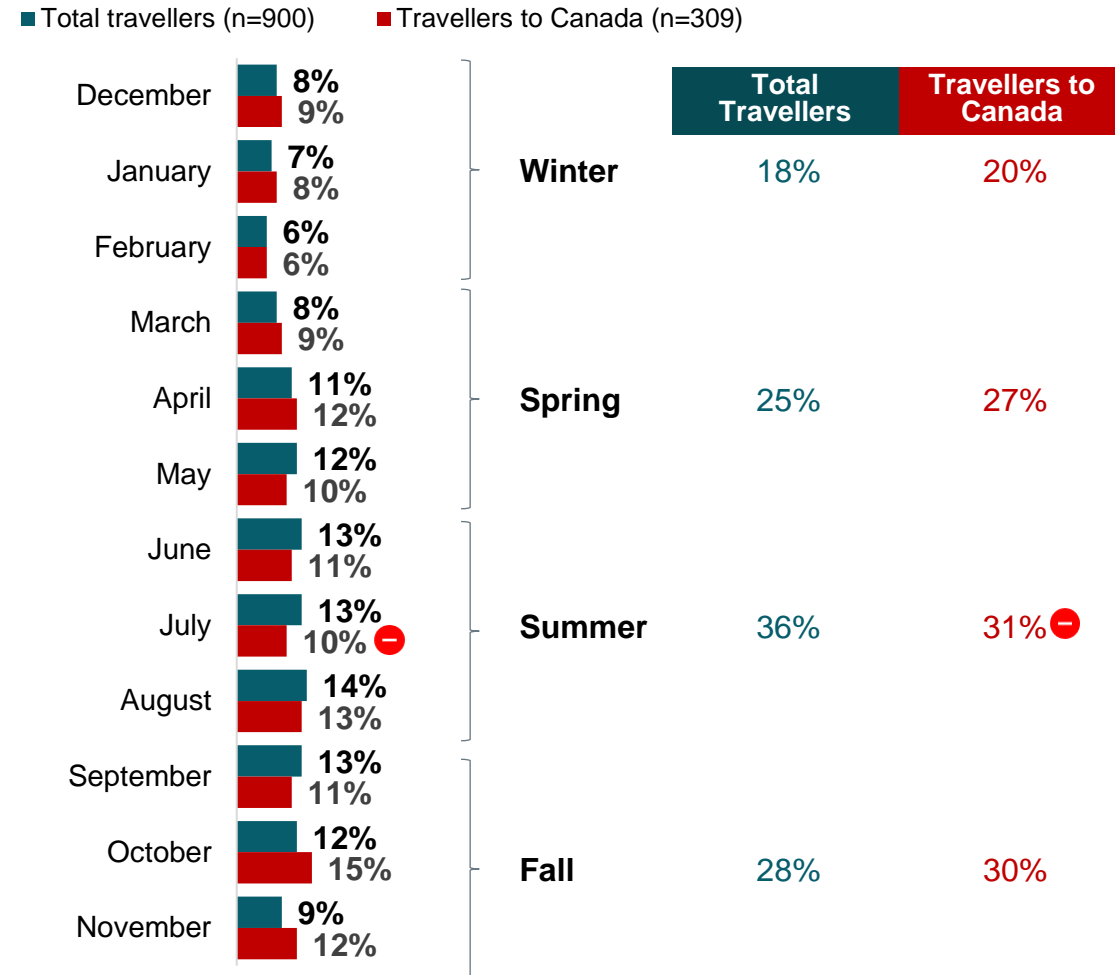
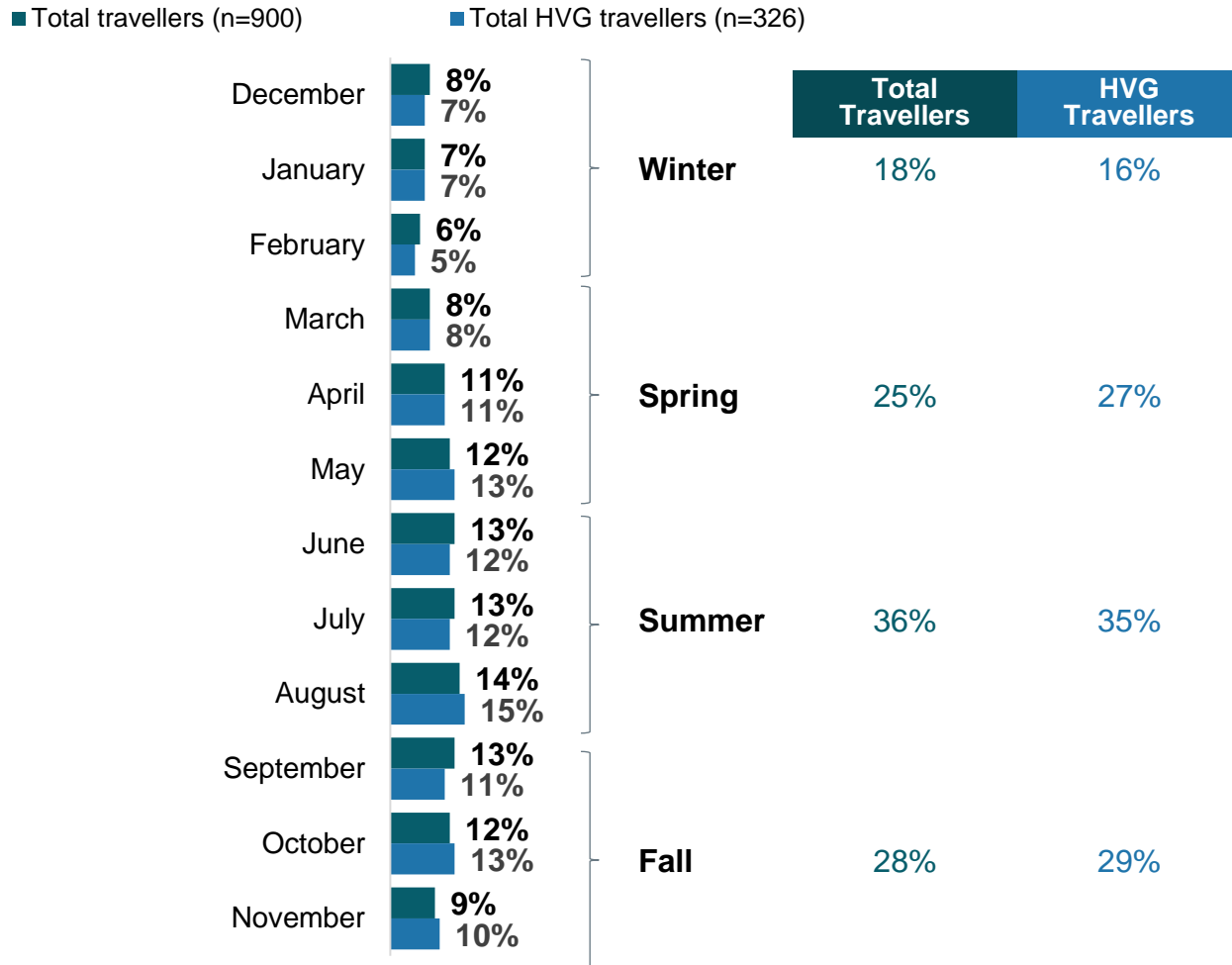
Total Travellers to Any Destination vs. Total Travellers to Canada



Time of Year Travelled For Recent Trip

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

Total Travellers to Any Destination vs. Total Travellers to Canada





Most Recent Trip to Canada



 Niagara Falls
Ontario



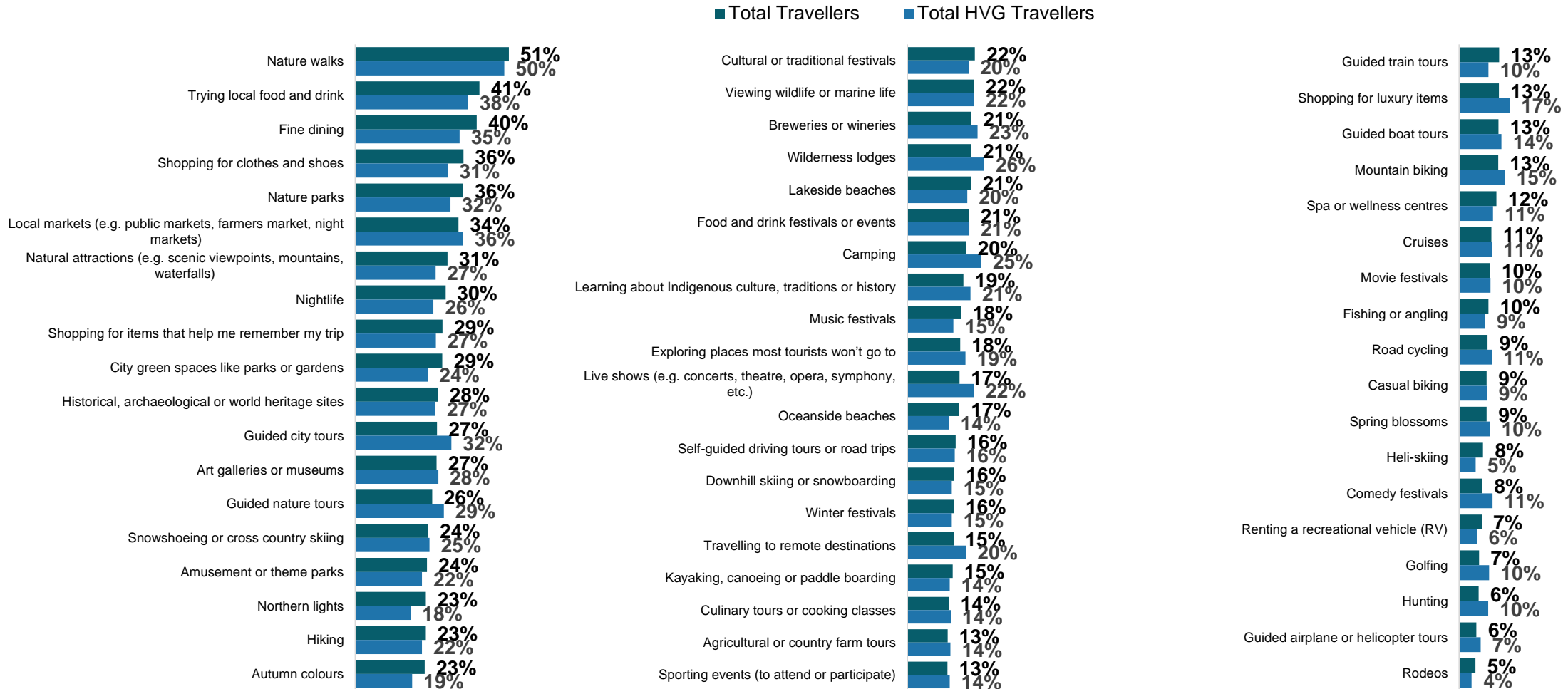
Top 10 Activities Participated in During Recent Trip to Canada



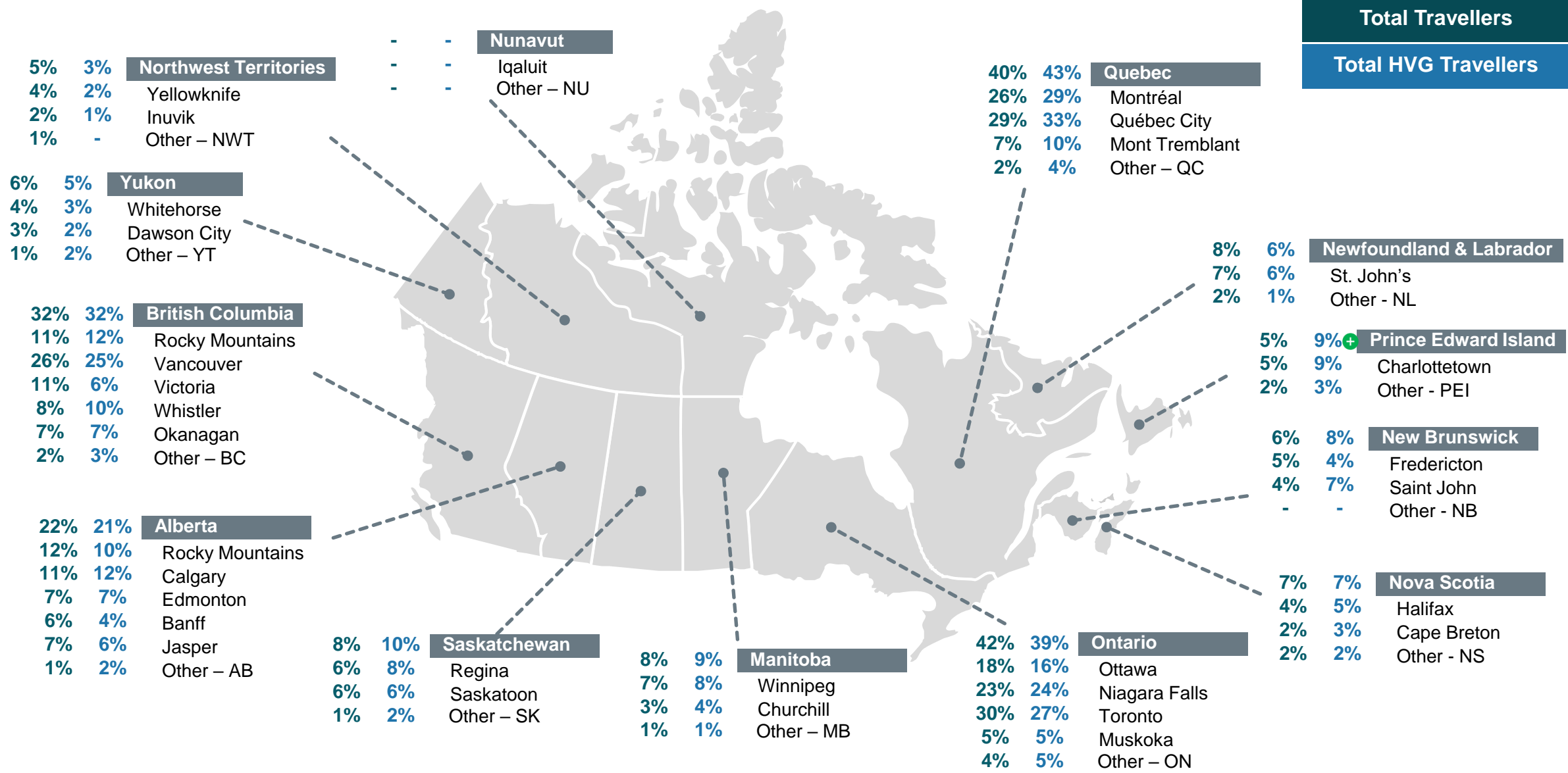
Total Travellers (n=309)	Total HVG Travellers (n=133)
Nature walks	Nature walks
Trying local food and drink	Trying local food and drink
Fine dining	Local markets (e.g. public markets, farmers market, night markets)
Shopping for clothes and shoes	Fine dining
Nature parks	Guided city tours
Local markets (e.g. public markets, farmers market, night markets)	Nature parks
Natural attractions (e.g. scenic viewpoints, mountains, waterfalls)	Shopping for clothes and shoes
Nightlife	Guided nature tours
Shopping for items that help me remember my trip	Art galleries or museums
City green spaces like parks or gardens	Shopping for items that help me remember my trip



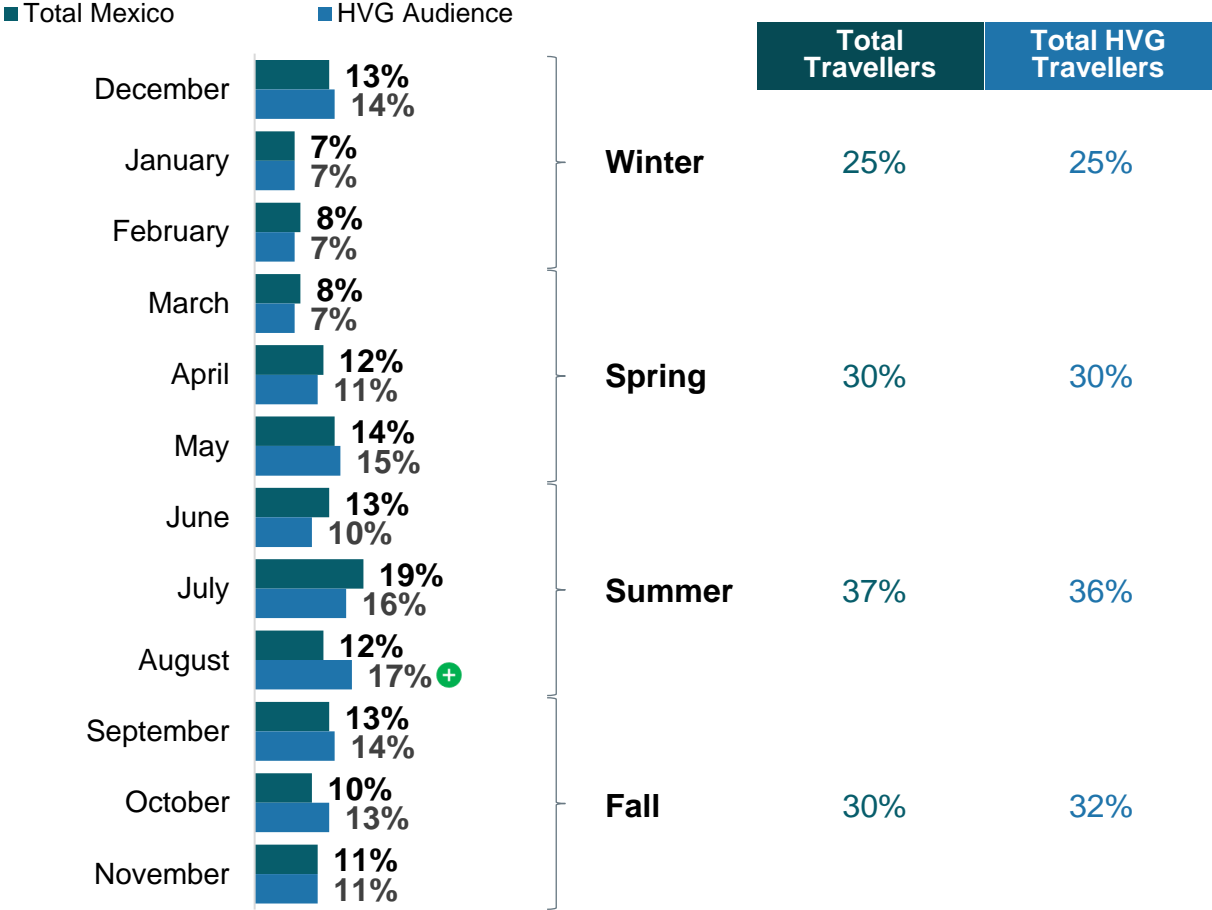
Activities Participated in During Recent Trip to Canada



Canadian Destinations Visited During Recent Trip



Time of Year Visited Canada



Demographics

	All Long-haul Travellers (n=1571)	HVG Audience (n=376)
Gender		
Male	48%	49%
Female	52%	51%
Other	-	-
Age		
18 to 34	35%	28% -
35 to 54	41%	42%
55 or older	24%	30% +
Children in household under the age of 18		
Yes	59%	62%
Employed		
Yes	78%	75%
Hold US Visa		
Yes	63%	82% +
Been to Canada Last 10 Years		
Yes	48%	69% +
Household Income (Monthly)		
Under 7,050 pesos	7%	1% -
7,050 pesos to 36,499 pesos	27%	3% -
36,500 pesos to 54,999 pesos	23%	4% -
55,000 pesos or more	33%	89% +



THANK YOU

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



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