

2023 GLOBAL TRAVELLER RESEARCH PROGRAM

MEXICO HIGHLIGHTS REPORT



Canada



St. John's

Newfoundland & Labrador



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STUDY OVERVIEW: MEXICO MARKET

Target Population

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

Timing of fieldwork

December 4th-15th 2023

Geographical Definition for Qualified Trips

Qualified trips refer to trips taken outside of Mexico and Central America

To note:

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

Key Insights



Canada ranks second highest for consideration only after the US on an unaided basis, with next 2-year immediate potential for Canada being 7.4M



Visitor traffic to Quebec and Ontario appears summer-skewed, while BC observes a more even distribution seasonally



Food delight and discovery of nature seem to attract significant interest



Canada is a popular holiday destination for couples and families with children under 18 years old



Prospective travellers to Canada show a keen interest in exploring Indigenous cuisine, engaging in outdoor adventures, and visiting museums

MARKET SIZING



Kyle
Saskatchewan



LONG-HAUL PLEASURE TRAVELLER SIZING



Total population aged 18 years or more¹
(among 3 target cities*)

24,454,000

X

Incidence rate: Long-haul pleasure travellers
who have taken a trip in the past 3 years or plan
to in the next 2 years²

51.1%

=



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

12,496,000

This study was conducted among long-haul pleasure travellers, represented by 12.5M Mexicans aged 18 years or more.



Essipit
Québec

* 3 target cities = Mexico City, Monterrey, Guadalajara
¹ Source: Estimates 2020 Census, Mexico National Institute of Statistics and Geography
 Note: Results are from 2023 YouGov Canada Omnibus Survey
²Base: General population aged 18+, among 3 target cities (n=659)

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



Total potential long-haul pleasure travellers aged 18 years or more (among 3 target cities*)

12,496,000

X

Target Market for Canada

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

82.4%

=



Size of the target market

10,296,500

X

Immediate Potential for Canada

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

72.0%

=



Immediate potential

7,413,500

* 3 target cities = Mexico City, Monterrey, Guadalajara

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)

7 Which of the following best describes your current situation when thinking about each of the following destinations for a holiday trip? (Select one for each) Realistically, how likely are you to take a holiday trip to Canada in the **next 2 years**? (Select one)

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

The next 2-year immediate potential for Canada is 7.4 million long-haul pleasure travellers.



Grand Manan Island
New Brunswick

Mexico GTRP –
December 2023

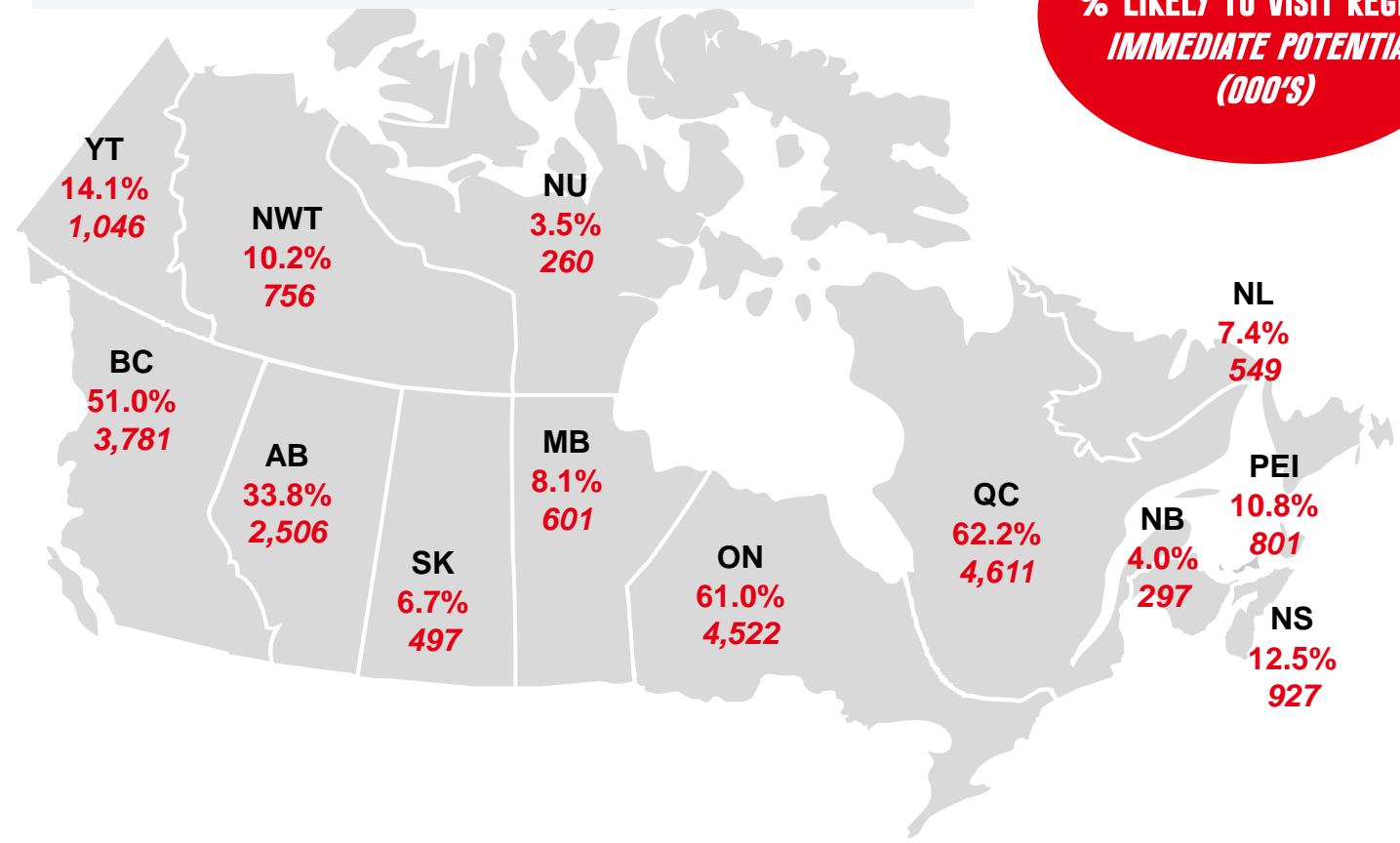


POTENTIAL MARKET SIZE FOR THE REGIONS

Québec and Ontario each have the potential to draw in over 4 million Mexican travellers over the next 2 years.

IMMEDIATE POTENTIAL FOR CANADA: 7,413,500

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



Base: Those in the dream to purchase stages of the path to purchase for Canada and definitely/very likely to take a trip to Canada (n=1311)
If you were to take a holiday trip to Canada, in the next 2 years, which of the following Canadian provinces or territories are you likely to visit? (Select all that apply)



TRAVEL DESTINATIONS LIKELY TO VISIT (NEXT 2 YEARS)



Potential travellers to Canada are most interested in visiting Montréal, Toronto, Niagara Falls, and Vancouver.



Niagara Falls
Ontario

British Columbia	
Vancouver	42%
Rocky Mountains	22%
Victoria	16%
Whistler	8%
Okanagan	4%
Other – BC	2%

Alberta	
Rocky Mountains	21%
Calgary	17%
Edmonton	11%
Banff	5%
Jasper	5%
Other – AB	3%

Ontario	
Toronto	44%
Niagara Falls	42%
Ottawa	32%
Muskoka	5%
Other – ON	2%

Québec	
Montréal	49%
Québec City	42%
Mont Tremblant	12%
Other – QC	3%

Base: Those in the dream to purchase stages of the path to purchase for Canada & definitely/likely to take a trip to Canada (n=1311)
Within [PROVINCE], which travel destinations are you likely to visit? (Select all that apply)

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

Saskatchewan	
Regina	4%
Saskatoon	4%
Other – SK	1%

Manitoba	
Winnipeg	5%
Churchill	4%
Other – MB	1%

New Brunswick	
Fredericton	2%
Saint John	2%
Other – NB	1%

Nova Scotia	
Halifax	7%
Cape Breton	5%
Other – NS	2%

Prince Edward Island	
Charlottetown	9%
Other – PEI	2%

Newfoundland & Labrador	
St. John's	5%
Other – NL	3%

Yukon	
Whitehorse	8%
Dawson City	7%
Other – YT	2%

Northwest Territories	
Yellowknife	7%
Inuvik	3%
Other – NWT	2%

Nunavut	
Iqaluit	2%
Other – NU	1%



Less than one in ten travellers interested in going to Canada plan on visiting any of the Territories and Atlantic provinces.



10 Base: Those in the dream to purchase stages of the path to purchase for Canada & definitely/likely to take a trip to Canada (n=1311) Within [PROVINCE], which travel destinations are you likely to visit? (Select all that apply)

TIME OF YEAR INTERESTED IN TAKING A TRIP TO CANADA (NEXT 2 YEARS)

Province/Territory	Winter (Dec, Jan, Feb)	Spring (Mar, Apr, May)	Summer (Jun, Jul, Aug)	Fall (Sept, Oct, Nov)
British Columbia	14%	15%	19%	14%
Alberta	9%	13%	13%	9%
Saskatchewan	2%	3%	3%	2%
Manitoba	3%	3%	3%	2%
Ontario	14%	19%	23%	18%
Québec	14%	18%	25%	16%
New Brunswick	1%	2%	2%	1%
Nova Scotia	3%	4%	5%	4%
Prince Edward Island	3%	4%	4%	3%
Newfoundland & Labrador	2%	3%	3%	2%
Yukon	3%	5%	5%	4%
Northwest Territories	3%	3%	3%	3%
Nunavut	1%	2%	2%	1%



Travellers who plan on visiting Canada in the next two years are most interested in visiting during the summer months. Travellers also exhibit some interest in visiting during the spring months.





Peggy's Cove
Nova Scotia



CANADIAN TOURISM DATA
collective



DESTINATION
CANADA

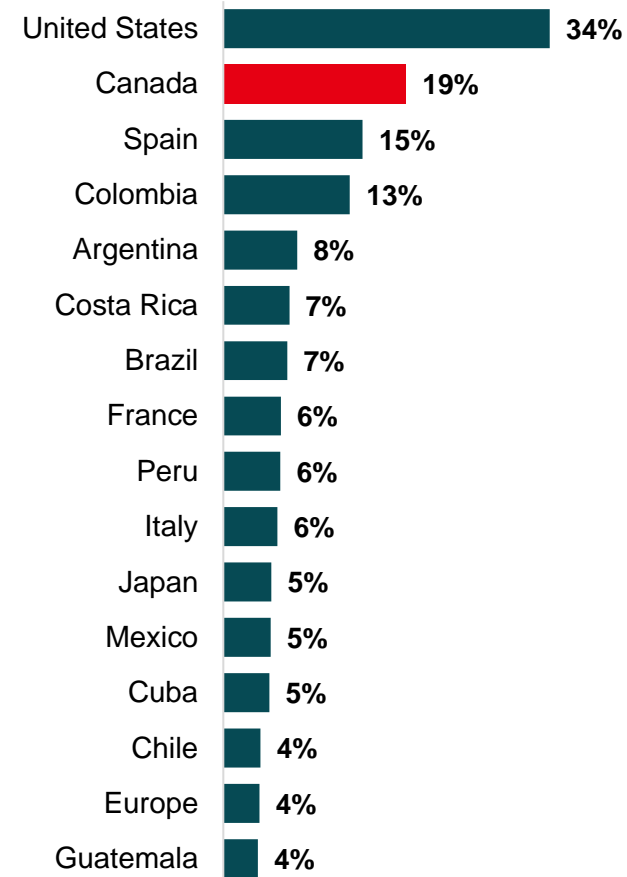
CONSIDERING CANADA AS A TRAVEL DESTINATION

Mexico GTRP – December 2023



UNAIDED DESTINATION CONSIDERATION (NEXT 2 YEARS)¹

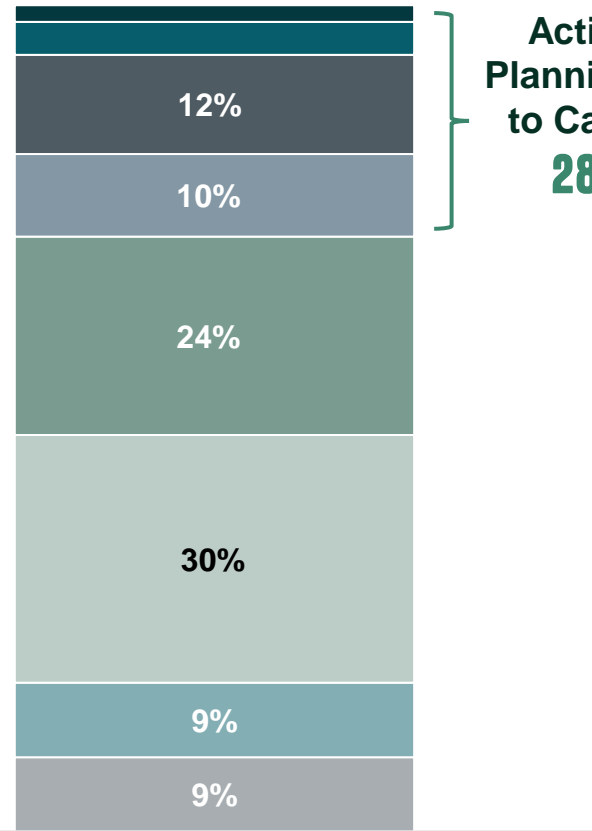
On an unaided basis, Canada ranks as a top destination for Mexican travellers and only trails the United States for future travel destinations.



Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1571)
 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)
¹Note: Roll-up of brand mentions by country (e.g., percentage who said "Canada" or any destination in Canada).

STAGE IN THE PURCHASE CYCLE FOR CANADA

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



Almost three in ten Mexican travellers are actively planning a trip to Canada.



Lake Louise
Alberta



TRAVEL BEHAVIOURS



Whitehorse
Yukon



TOP 10 GENERAL ACTIVITIES INTERESTED IN

67%

Oceanside Beaches

65%

Trying Local Food and Drink

64%

Nature Walks

60%

Fine Dining

59%

Natural Attractions

56%

Nature Parks

53%

Local Markets

53%

Historical, Archaeological or World heritage sites

48%

Northern Lights

46%

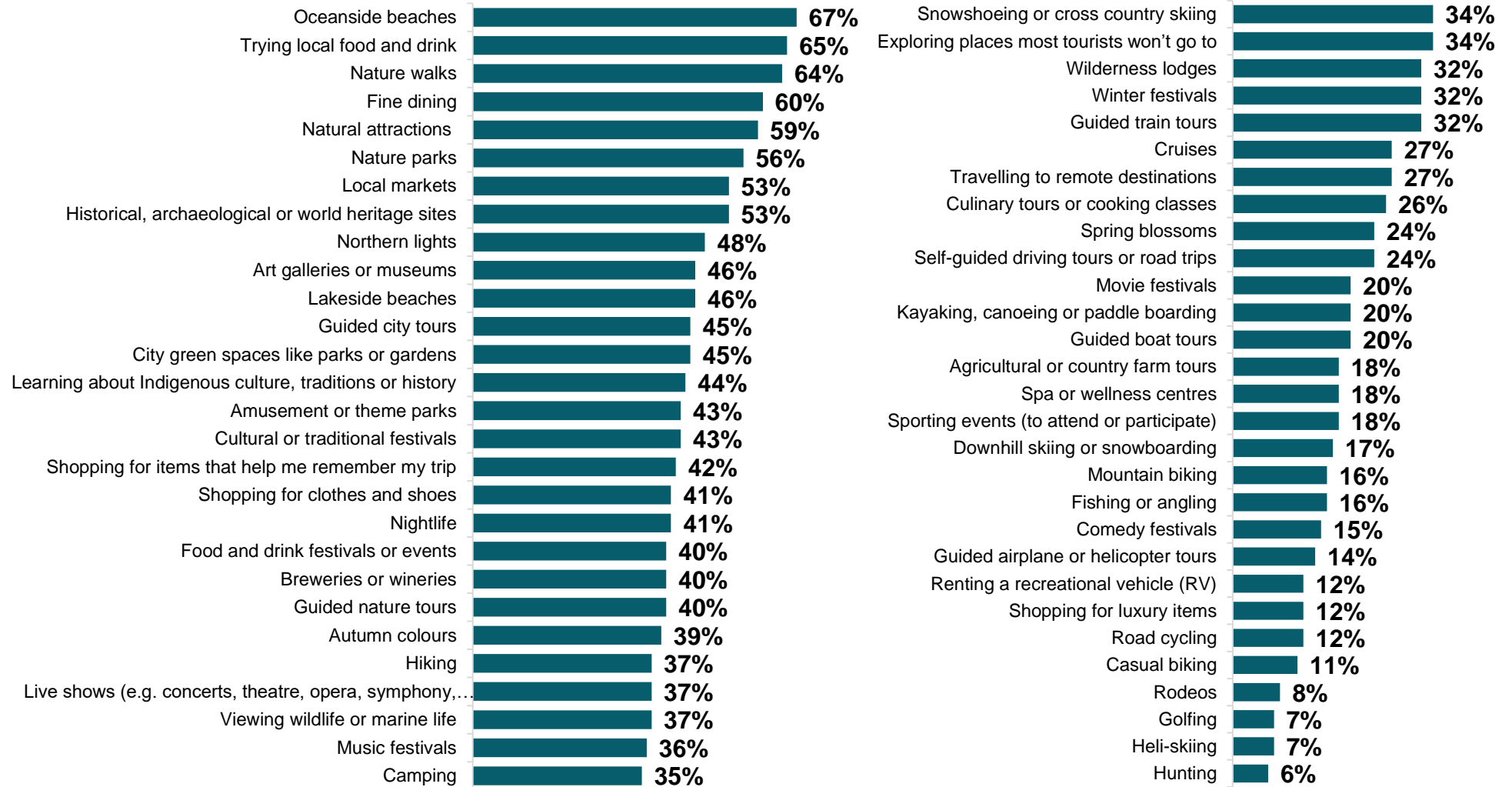
Art Galleries or Museums



Mexican travellers are most interested in oceanside beaches, local cuisine, and nature walks.



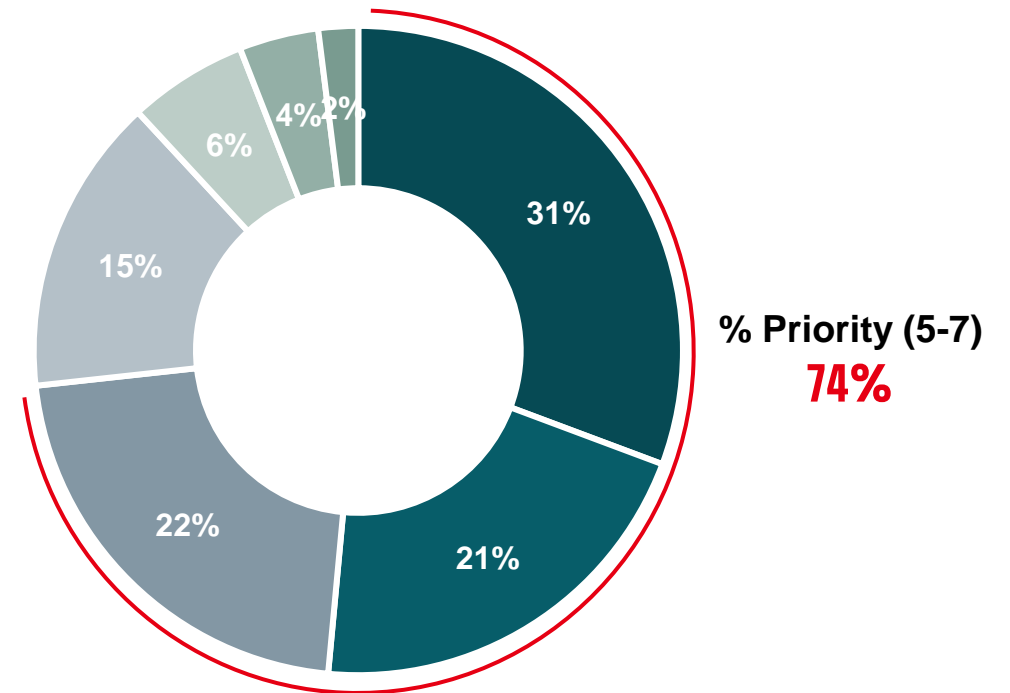
GENERAL ACTIVITIES INTERESTED IN (FULL LIST)



Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1571)
In general, what activities or places are you interested in while on holiday? (Select all that apply)



PRIORITY OF SUSTAINABLE TRAVEL WHEN PLANNING A TRIP



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

Sustainability is a key consideration for Mexican travellers with almost three out of four indicating sustainability as a priority.

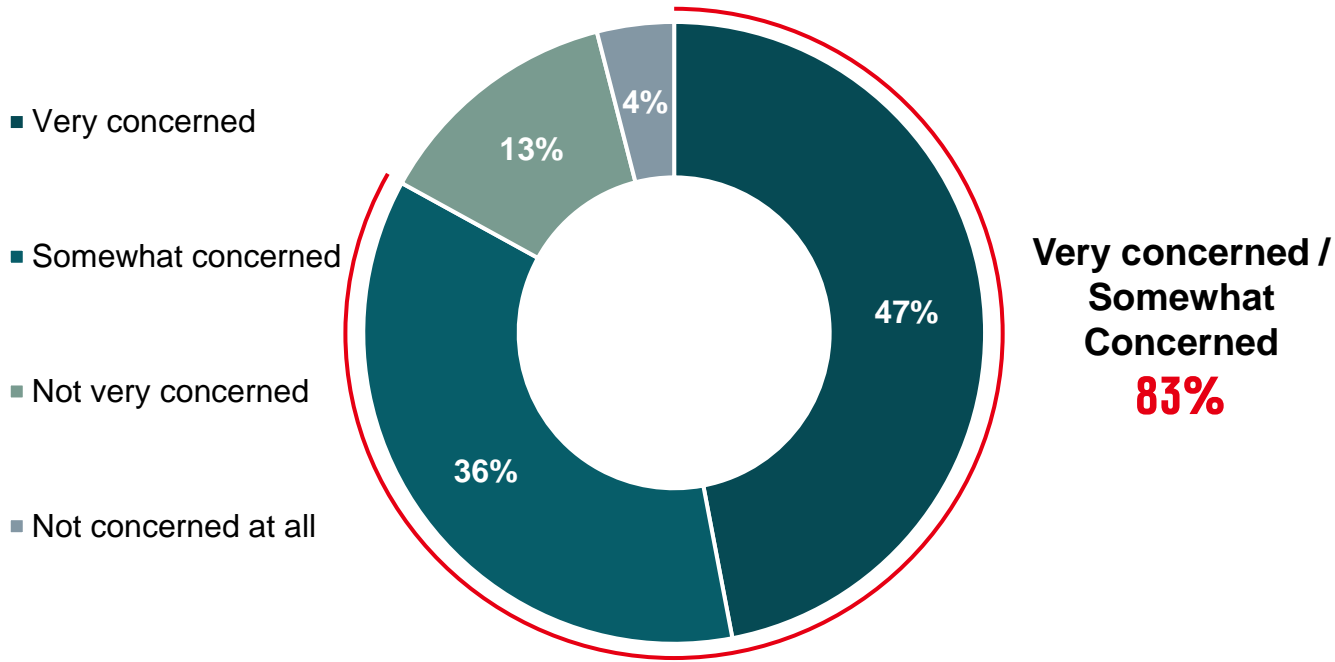


Nahanni

Northwest Territories

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1571)
How much of a priority is sustainable travel to you when you are planning a trip? Please use a 7-point scale, where 7 means 'essential priority' and 1 means 'not a priority'.
Sustainable travel refers to "travel that minimizes any negative impacts on the destination's environment, economy and society, while making positive contributions to the local people and conserving the destination's natural and cultural heritage".

IMPACT OF EXTREME WEATHER EVENTS ON TRAVEL PLANS

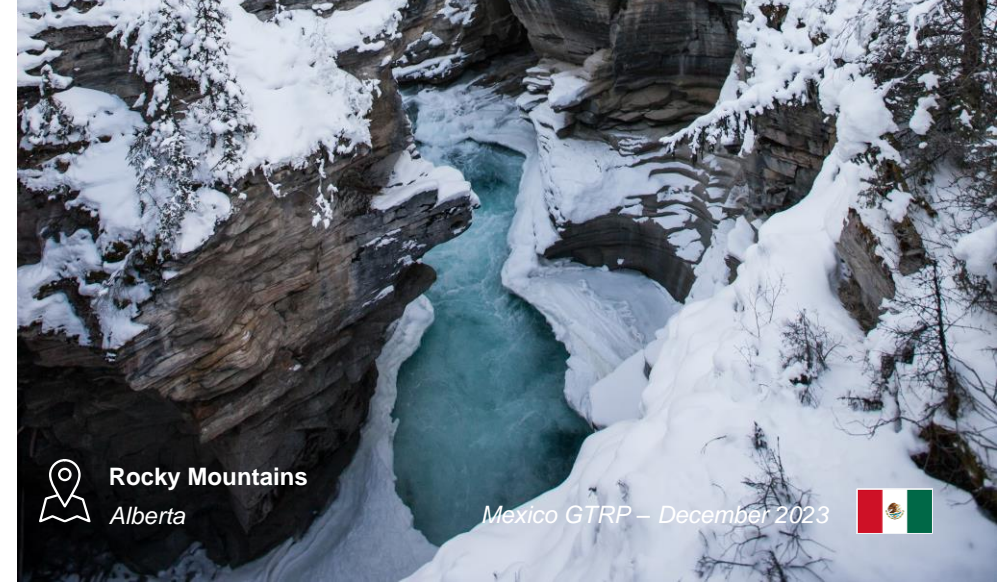


27% Changed/Cancelled plans in the past 3 years due to extreme weather events

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=777)
 How concerned are you about extreme weather events affecting your travel plans?
 In the past 3 years, have you ever had to change plans or cancel a trip due to extreme weather events?
 Extreme weather events description: As you may or may not be aware, extreme weather events are occurrences of unusually severe weather or climate conditions. They are often short-lived and include blizzards, heat waves, wildfires, tornadoes, hurricanes or tropical cyclones.



Majority of Mexican travellers are concerned about the impact of extreme weather events, with over one in four travellers having changed their travel plans in the past three years.



INDIGENOUS TOURISM ACTIVITIES



North Vancouver
British Columbia



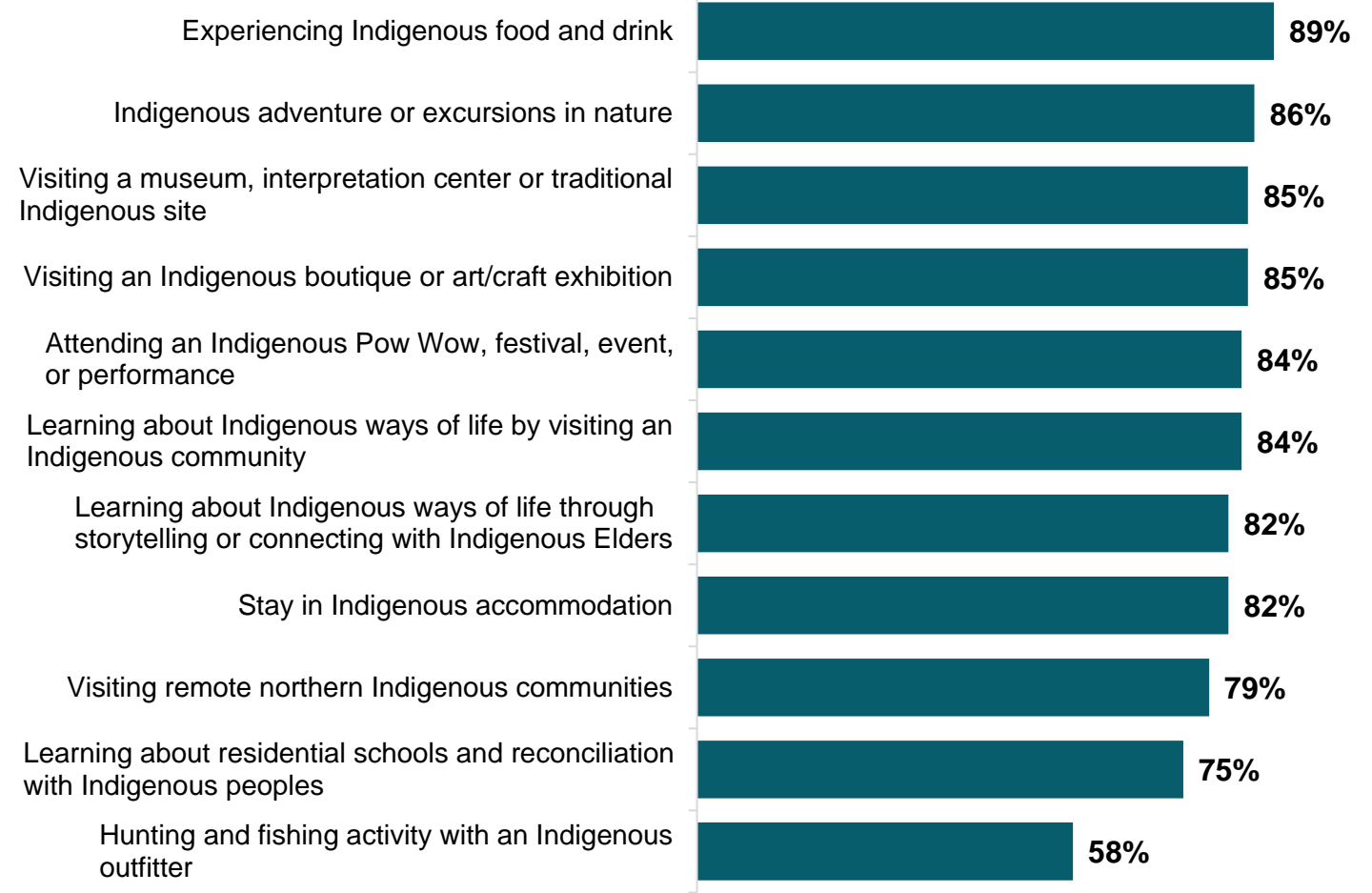
INTEREST IN INDIGENOUS CULTURAL & TOURISM ACTIVITIES

Potential visitors to Canada are particularly interested in experiencing Indigenous food, outdoor adventures, and museums.



Uclulet
British Columbia

% Somewhat/Very Interested



Base: Those in the dream to purchase stages of the path to purchase for Canada (n=1311)
What is your level of interest in the following Indigenous cultural experiences and tourism activities in Canada? Indigenous Tourism Description: As you may or may not know, in Canada, Indigenous tourism businesses are majority-owned or operated by Indigenous peoples (First Nations, Métis or Inuit). The social and economic benefits of Indigenous tourism businesses goes back to the business owners and/or the communities where they are based.

TRIP TO CANADA IN THE PAST 3 YEARS



Jasper
Alberta



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

Travellers to Canada in the past 3 years were most likely to spend time in nature, dining, and shopping.

51%

Nature Walks

34%

Local Markets

41%

Trying Local Food and Drink

31%

Natural Attractions

40%

Fine Dining

30%

Nightlife

36%

Shopping for Clothes and Shoes

29%

Shopping for Items That Help me Remember my Trip

36%

Nature Parks

29%

City Green Spaces Like Parks or Gardens

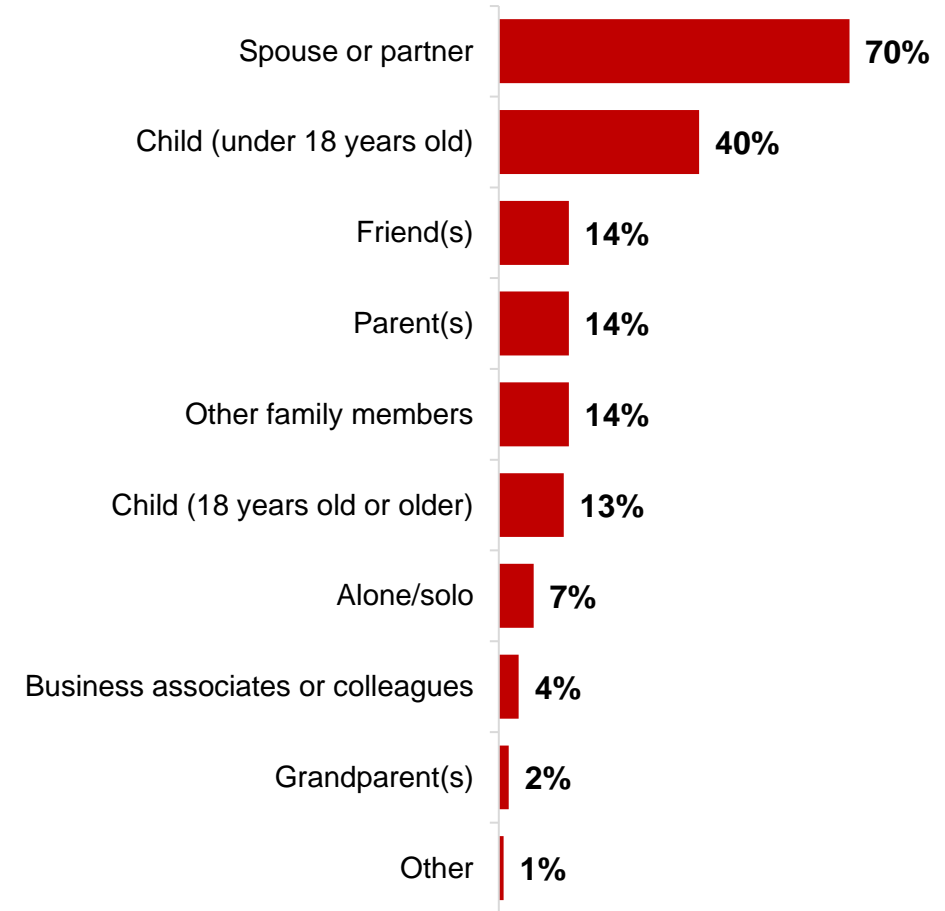
Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travellers to Canada (n=309)
Which of the following activities, if any, did you participate in during your recent trip to Canada? (Select all that apply)



Johnston Canyon
Alberta

TRAVEL PARTY OF PAST 3 YEAR TRIP TO CANADA

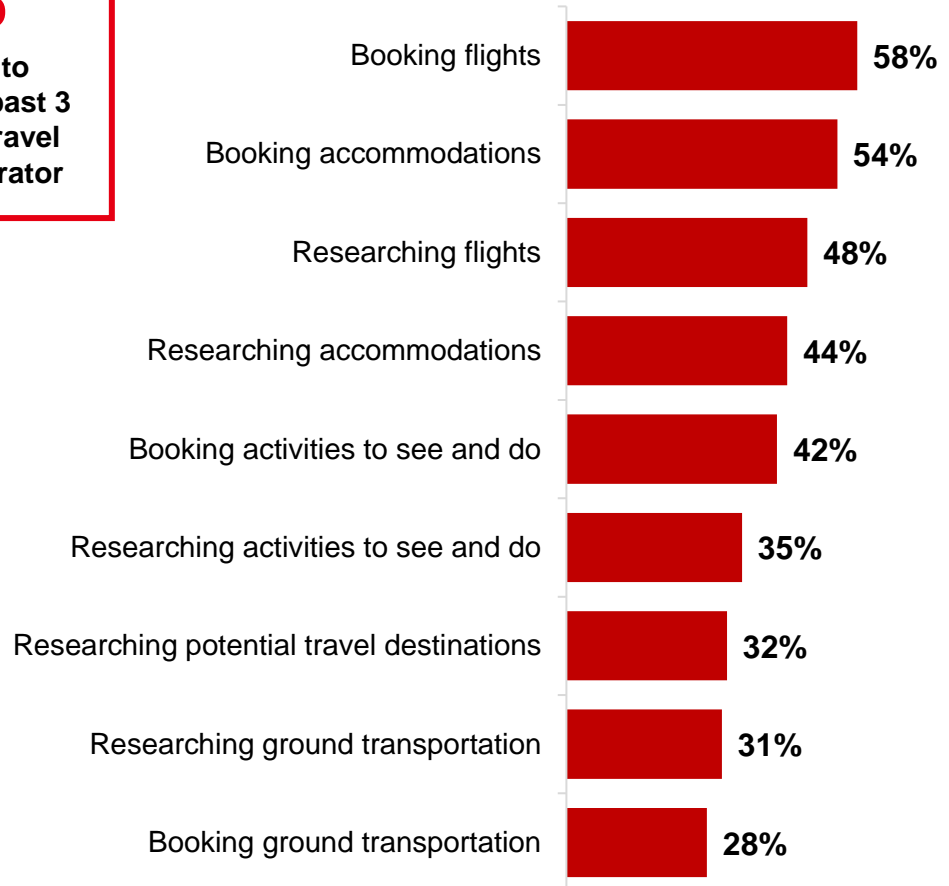
Most travellers to Canada in the past 3 years visited with their spouse or partner. Four in ten travellers also visited with their children.



Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travellers to Canada (n=309)
With whom did you travel on this trip? (Select all that apply)

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

53%
of travellers to Canada in the past 3 years used a travel agent/tour operator



Just over half of travellers to Canada in the past 3 years used a travel agent/ tour operator, and most likely to use one to help book flights and accommodations.



Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travellers to Canada, Used a Travel Agent/Tour Operator (n=173)
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)
Which of the following did a travel agent or tour operator help you with?



ORGANIZED GROUP TOUR USAGE FOR PAST 3 YEAR TRIP TO CANADA

One-third of travellers to Canada in the past 3 years reported their whole trip was part of an organized group tour, while one in four said only a portion of their trip was part of an organized tour group.

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

33%

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

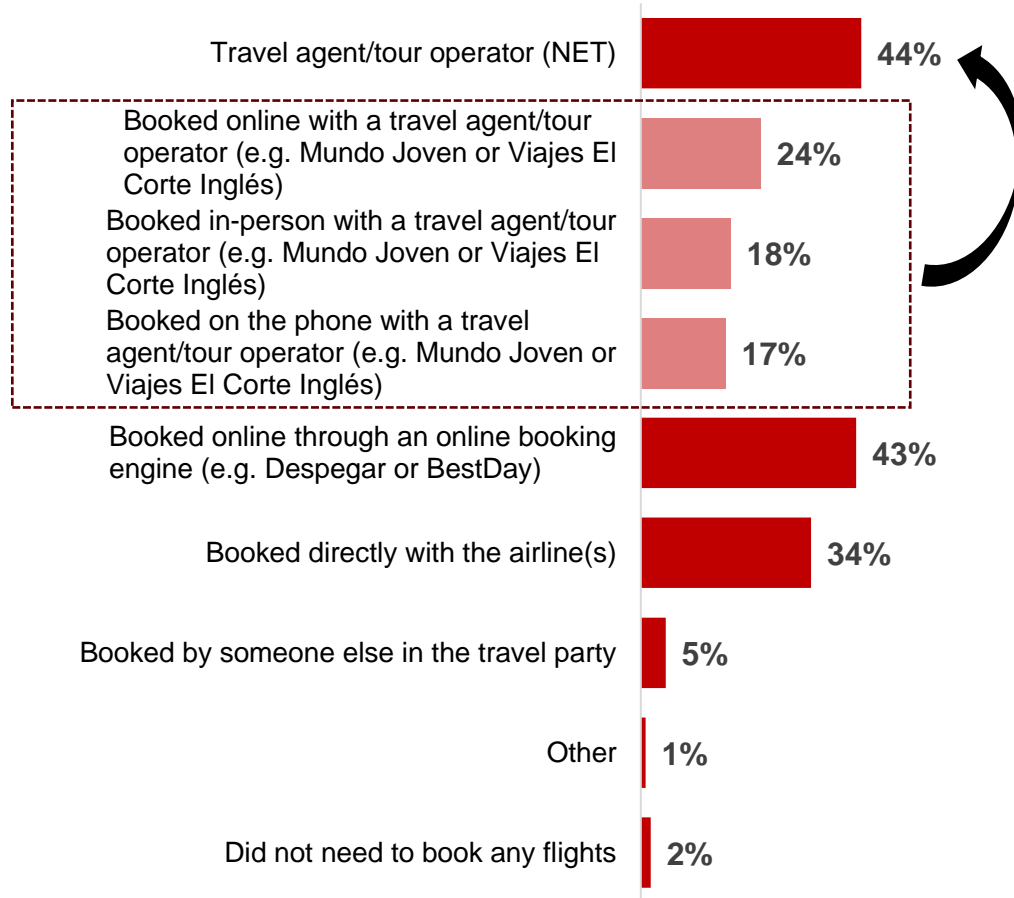
27%

No

40%

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travellers to Canada (n=309)
An organized group tour consists of a package where any combination of accommodation, transportation, food and/or activities are included as a multi-day itinerary. Did you travel as a part of an organized group tour on this trip?

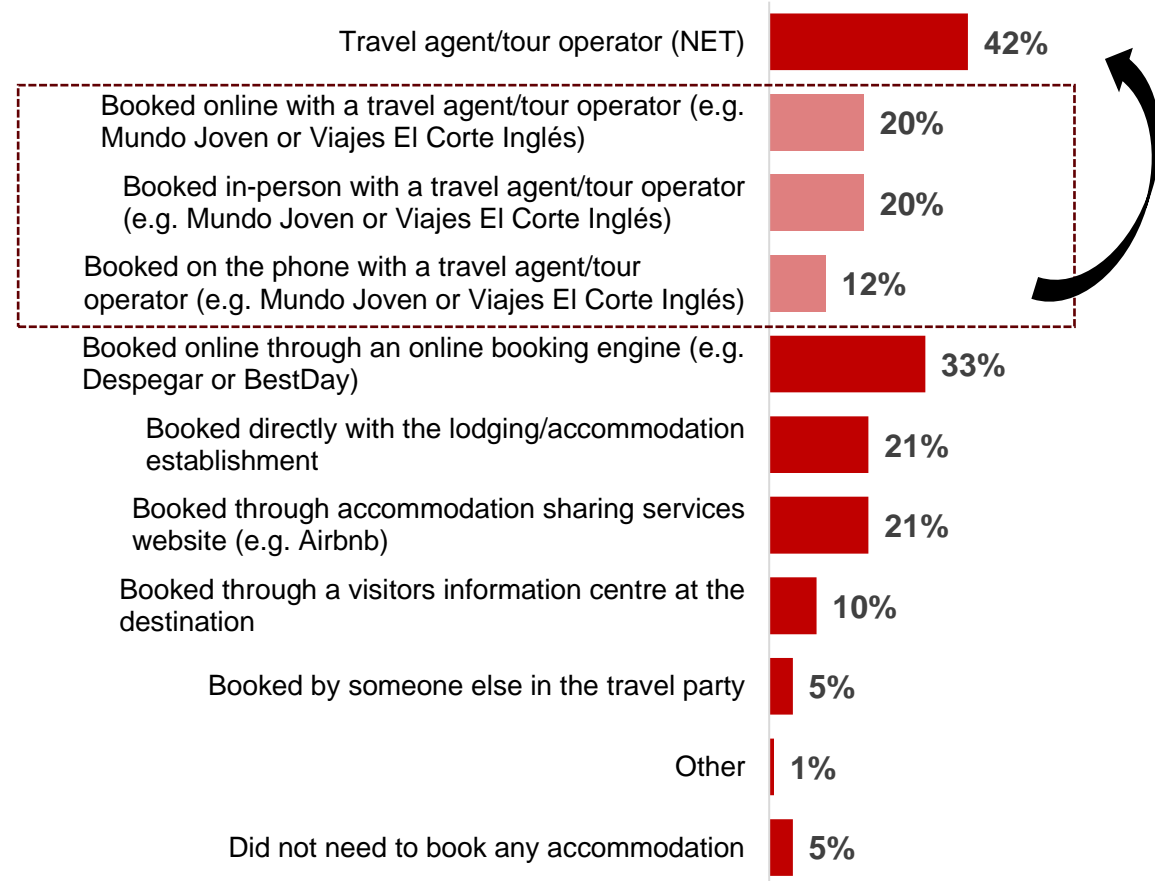
BOOKING FLIGHTS FOR PAST 3 YEAR TRIP TO CANADA



Over four in ten travellers to Canada in the past 3 years booked flights using a travel agent/tour operator with most booking online.

BOOKING ACCOMMODATIONS FOR PAST 3 YEAR TRIP TO CANADA

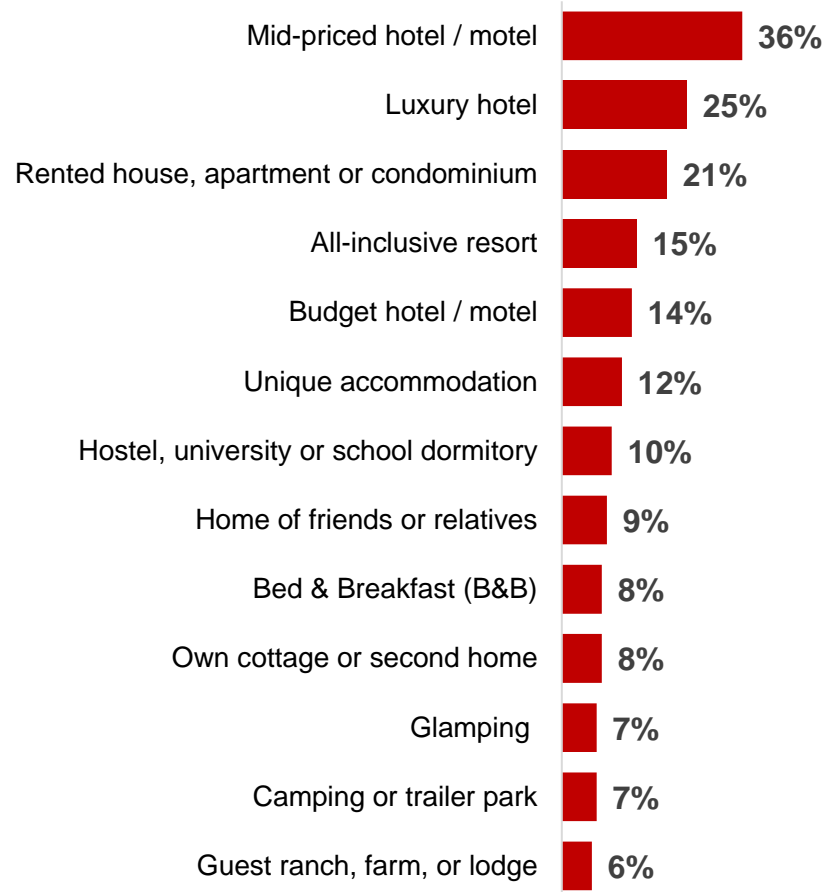
Over four out of ten travellers to Canada in the past 3 years booked accommodations with a travel agent/tour operator. This is followed by bookings through online booking engines and directly with accommodation providers.



Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travellers to Canada (n=309)
How did you book your accommodation for this trip? (Select all that apply)



TYPES OF ACCOMMODATION DURING PAST 3 YEAR TRIP TO CANADA



Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination, Booked Accommodation, Travellers to Canada (n=294)
 Which type of accommodation did you stay in during this trip? (Select all that apply)



Travellers to Canada in the past 3 years were most likely to stay in a mid-priced hotel/ motel, luxury hotel, or rented accommodation.



THANK YOU

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



CANADIAN TOURISM DATA
collective