

Mexico has emerged as one of Canada’s most impactful international markets, with a particularly strong presence during the winter season.

Mexico’s recovery was the fastest of any international market. Visits hit 113% of 2019 levels in 2023, while spending exceeded pre-pandemic levels by 47%. However, the introduction of a visa requirement in 2024 led to a 28% decline in visits – though spending remained slightly elevated.

- The peso strengthened through mid-2024 but has since weakened against the Canadian dollar. Economic contraction is forecasted for 2025.
- Spending by Mexican visitors will remain strong, reaching 111% of 2019 levels in 2025.
- Visits are projected to grow 4.1% in 2025, though won’t return to 2019 levels until 2028.
- In 2026, Canada is expected to welcome 450,300 visitors from Mexico, who will spend \$816 million.

Spending and visitation levels (% relative to 2019)<sup>1</sup>

	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030
Spend	100	12	18	73	147	104	111	124	134	144	153	162
Visitation	100	20	18	71	113	81	84	92	98	102	106	110

● 0%-50%

● 51%-75%

● 76%-100%

● 101%-120%

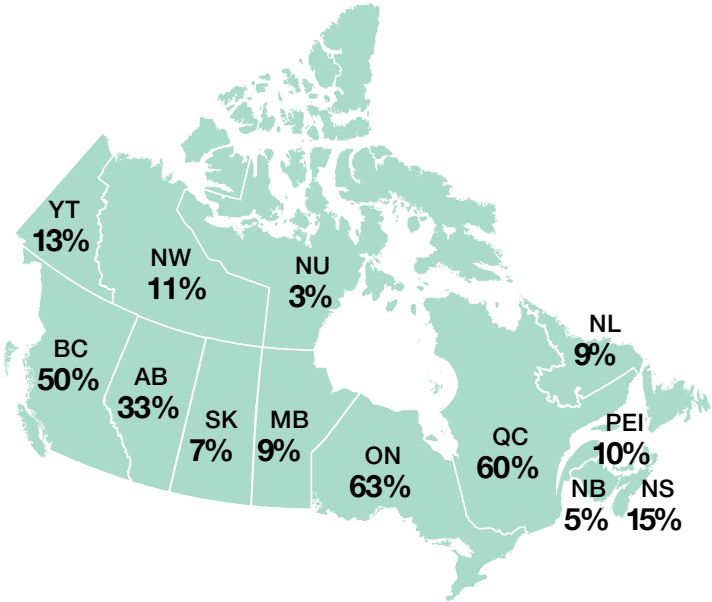
● 121%+

There is an unprecedented economic opportunity from a growing tourism industry, but there is significant potential for disruption in 2025. To remain resilient, our industry must reinforce that Canada remains open and friendly.

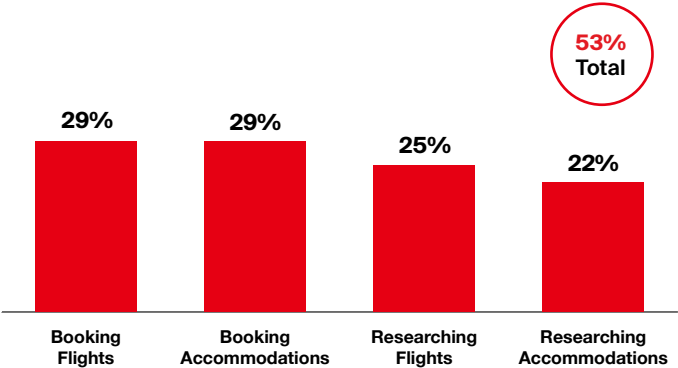
Potential Market Size<sup>2</sup>



Likelihood to Visit Canadian Regions (Next 2 Years)



Use Travel Agent on Canada Trip<sup>2</sup>




The DC Tourism Outlook Fall 2023 has been adjusted from 2023 to 2025 to reflect the latest arrival numbers.

<sup>1</sup> Destination Canada Tourism Outlook 2025-2030

<sup>2</sup> Destination Canada Global Traveller Research Program 2024

\*Mexico population sizing only for 3 target regions of Mexico City, Monterrey, & Guadalajara

In Mexico, there are two key priority segments selected through advanced analysis of their alignment to Canada’s product offerings, their potential economic impact, brand alignment, and their ability to benefit Canadian communities.



Mexico Priority Segment

REFINED GLOBETROTTERS

% Of Mexico Adult Population

11%

% Of Mexico Visitors to Canada

18%

% Of Mexico Spend to Canada

26%

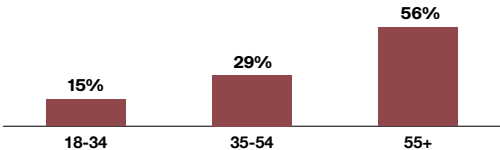
We prioritize travel above all, indulging in world-class destinations, gourmet dining, and exclusive experiences. We are experienced travellers who are always on the lookout for new, unique places to cross of our list.


TOP CANADA ACTIVITIES

- Local Cuisine
- Cultural Experiences & Attractions
- Health and Wellness
- Guided Tours

Type of Travel Trade	Level of Use (compared to rest of market)
Travel Trade for group travel	★★★★★ (Very High)
Travel Trade for non-group travel	★★★★★ (Very High)

AGE





Mexico Priority Segment

OUTDOOR EXPLORERS

% Of Mexico Adult Population

15%

% Of Mexico Visitors to Canada

23%

% Of Mexico Spend to Canada

24%

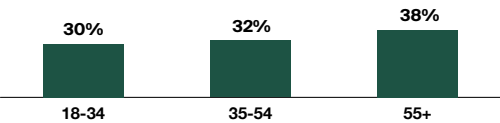
We are nature explorers who crave the thrill of unknown landscapes and overcoming challenges. Adventure travel allows us to grow, learn new skills, and establish personal traditions.

TOP CANADA ACTIVITIES

- Nature Experiences
- High-intensity Sports
- Water / Winter Based Sports
- Casual Sports

Type of Travel Trade	Level of Use (compared to rest of market)
Travel Trade for group travel	★★★★☆ (High)
Travel Trade for non-group travel	★★★★☆ (High)

AGE



Source: Destination Canada Traveller Segmentation Program 2024

Note: Segment sizing estimates will differ from those in the Global Traveller Research Program (GTRP), which applies stricter screening criteria—specifically a more narrowly defined long-haul traveller profile.

\*Mexico population sizing only for 3 target regions of Mexico City, Monterrey, & Guadalajara

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