2024 GLOBAL TRAVELLER RESEARCH PROGRAM

MEXICO HIGHLIGHTS REPORT

Canada

DESTINATION CANADA

CANADIAN TOURISM DATA collective

Mount Thor   *Nunavut*
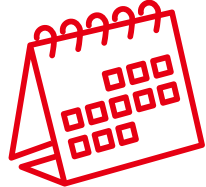
TABLE OF CONTENTS

Alberta

STUDY OVERVIEW: MEXICO MARKET

The Global Traveller Research Program is an annual survey commissioned by Destination Canada and conducted by YouGov Canada. The study fielded online in Spanish, with sample being sourced from a nationally established panel.

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.

Highly Engaged Guest (HEG) Audience Definition: Four segments that have been identified by Destination Canada as having higher economic and responsible values that most benefit Canadian communities.
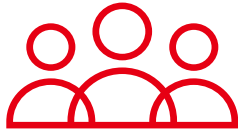
Timing of Fieldwork **November 18th – December 6th, 2024**	**Geographical Definition for Qualified Trips** **Outside of: Mexico and Central America**	**Sample Distribution**

Sample Distribution

Sample distribution:	**Mexico City, Monterrey & Guadalajara**
Highly Engaged Guest (HEG) Audience:	**1017**
Other travellers:	**494**
Total sample size:	**1511**

- In 2023, DC switched research providers to YouGov Canada, with the project being migrated over to YouGov's proprietary panel.

Newfoundland and Labrador

Key Insights

Canada continues to be a leading international destination among Mexican travellers, with next 2-year immediate potential for Canada being 7.5M

Potential visitors to Canada do not show a strong seasonal preference, though some prefer Summer. Notably, Quebec is most popular during Winter

Travellers are interested in visiting oceanside beaches and going on nature walks

Travellers to Canada in the past 3 years were mostly on holiday trips, choosing Canada for factors such as safety, the opportunity to relax, and being a great family destination

There is a high level of interest in Indigenous culture among Mexican Travellers; safety and comfort of the destination, as well as accessibility and ease of travel would increase their interest in Indigenous cultural experiences

MARKET SIZING

Killarney Provincial Park
Ontario

MARKET SIZING – LONG-HAUL TRAVELLERS

General Population within 3 target cities* 18+

24,454,000 (General Population within 3 target cities* 18+)

38% Took a Long-Haul^ Pleasure Trip in the Past 3 Years

9,292,520 (Recent Long-Haul Travellers)

42% Plan To Take a Long-Haul Pleasure Trip In Next 2 Years

10,270,500 (Upcoming Long-Haul Travellers)

51.1% Incidence Rate

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

12,496,000 (Total Long-haul Travellers)

* 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)

POTENTIAL MARKET SIZE FOR CANADA (NEXT 2 YEARS)

Total potential **Long-Haul Pleasure** travellers aged 18 years or more

12,496,000

x

Target Market for Canada
(Those in the dream to purchase stages of the path to purchase for Canada)

83.8%

=

Size of the Target Market

10,470,500

x

Immediate Potential for Canada
(Will definitely/very likely visit Canada in the next 2 years[1])

71.6%

=

Immediate Potential

7,491,500
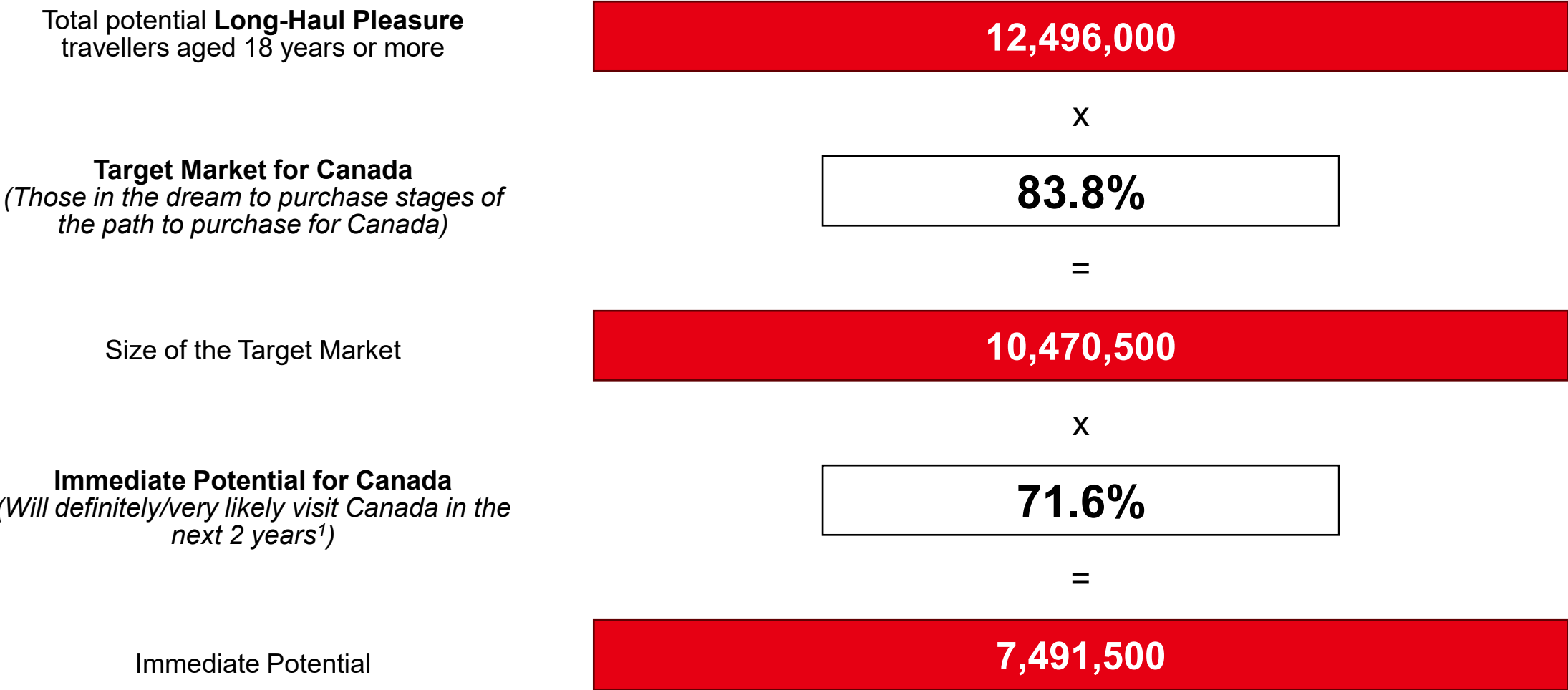
[1] Includes respondents likely to visit Canada for a trip of 1 to 3 nights, or a trip of 4 nights or more.
Base: Target market for Canada = long-haul pleasure travellers (past 3 years or next 2 years) (n=1511); Immediate potential for Canada = dream to purchase stages for P2P for Canada (n=1269)
C1. 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)

↑ / ↓ = significantly higher/lower result (2024 vs. 2023)

POTENTIAL MARKET SIZE BY REGION

Ontario and Quebec have the potential to draw in over 4.4 million Mexican travellers each over the next 2 years.

Nunavut

Immediate Potential for Canada: **7,491,500**

Key:

% likely to visit region
Immediate potential (000's)

YT
12.7%
951

NWT
11.2%
842

NU
3.4%
257

NL
9.2%
692

BC
49.9%
3,738

AB
32.8%
2,455

MB
8.5%
636

SK
7.2%
541

ON
62.7%
4,694

QC
60.0%
4,493

NB
5.0%
376

PEI
9.9%
743

NS
15.1%
1,130
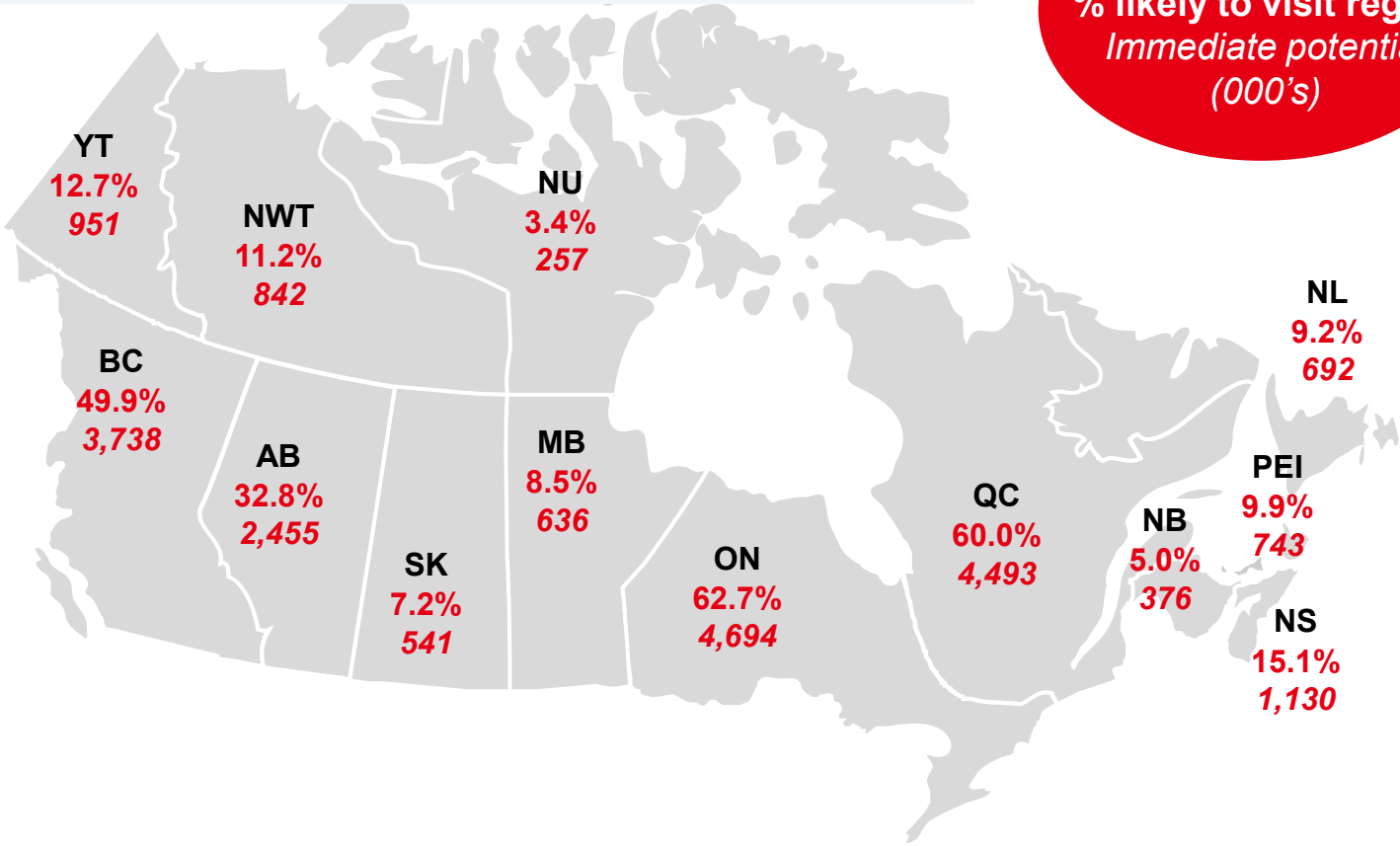
Base: Those in the dream to purchase stages of the path to purchase for Canada and definitely/very likely to take a trip to Canada (n=1269)
E2. If you were to take a holiday trip to Canada, in the next 2 years, which of the following Canadian provinces or territories are you likely to visit? (Select all that apply)

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	16%	14%	18%	16%
Alberta	9%	10%	11%	9%
Saskatchewan	2%	3%	3%	2%
Manitoba	3%	3%	3%	2%
Ontario	17%	17%	22%	18%
Quebec	17%	16%	21%	16%
New Brunswick	2%	2%	2%	1%
Nova Scotia	5%	4%	5%	4%
Prince Edward Island	2%	3%	4%	3%
Newfoundland & Labrador	2%	3%	3%	3%
Yukon	4%	4%	4%	3%
Northwest Territories	4%	4%	4%	3%
Nunavut	1%	1%	1%	1%

Mexican travellers do not show a strong seasonal preference, though there is a slight inclination for summer. Notably, Quebec's second most popular season is winter.

Whitehorse
Yukon

Mexico GTRP – December 2024

Base: Those in the dream to purchase stages of the path to purchase for Canada & definitely/likely to take a trip to Canada (n=1269)
E3a-m. During what time of year are you considering visiting [PROVINCE]? (Select all that apply)

9

CANADA VS. COMPETITORS

Tofino
British Columbia

UNAIDED DESTINATION CONSIDERATION (NEXT 2 YEARS)[1]

On an unaided basis, Mexican travellers are most likely to consider the United States, followed by Canada.

Country	Value
United States	34%
Canada	19%
Spain	16%
Colombia	13%
Argentina	9%
Italy	9% ↑
Japan	7% ↑
Peru	7%
Brazil	7%
Costa Rica	6%
Francia	6%
Mexico	5%
Chile	4%
Cuba	4%
Germany	4% ↑
United Kingdom	4%
Guatemala	4%
Europe	4%
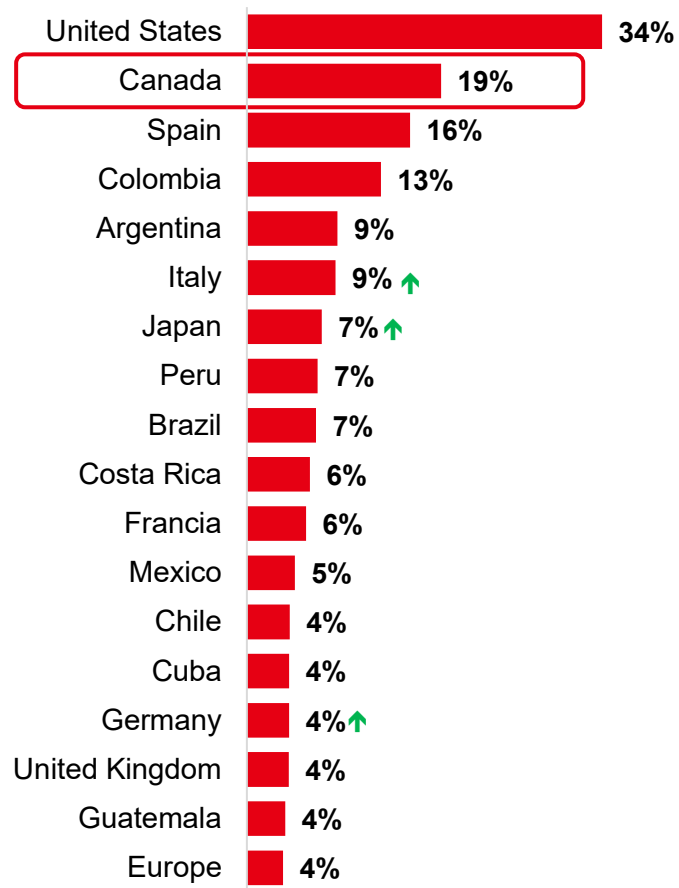
[1] Roll-up of brand mentions by country (e.g., percentage who said "Canada" or any destination in Canada).
Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1511)
B1. You mentioned that you are likely to take long-haul holiday trip in the next 2 years. Which destinations are you seriously considering? (Please list up to 3 destinations)

↑ / ↓ = significantly higher/lower result (2024 vs. 2023)

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

Stage	%
Have already booked my transportation and accommodations	4%
Am currently making transportation and accommodation arrangements	12%
Am planning the itinerary for a trip to this country	11%
Have started to gather some travel information	25%
Dreaming about visiting / returning someday	29%↓
Not interested in visiting / returning	9%
Have never thought of taking a trip	7%

Actively Planning trip to Canada 29% (top three segments: 4% + 12% + 11%)

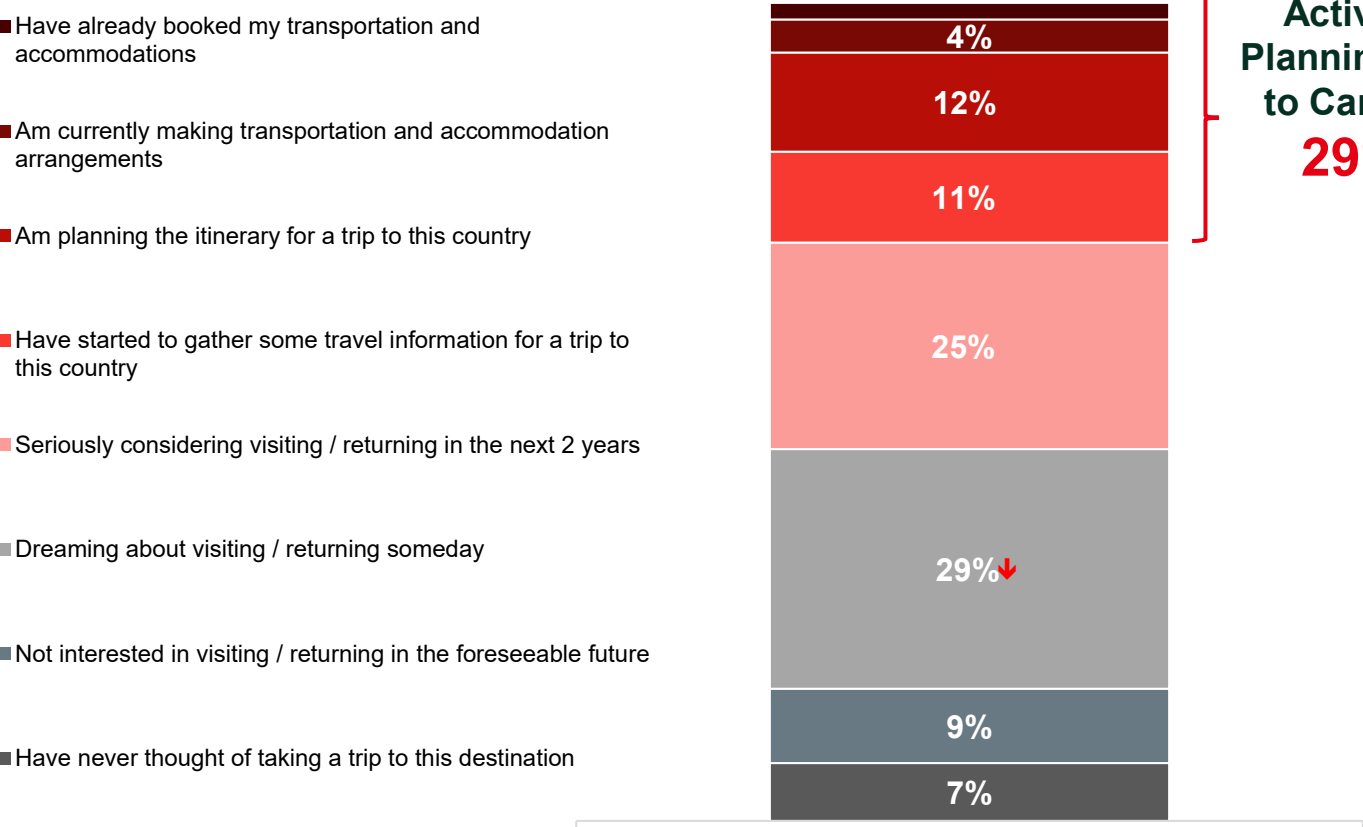**Nearly three in ten Mexican travellers are actively planning a trip to Canada.**

Lake Louise
Alberta

Mexico GTRP – December 2024

↑ / ↓ = significantly higher/lower result (2024 vs. 2023)

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 Canada (n=1511)
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)

INDIGENOUS TRAVEL

Carcross
Yukon

UNAIDED INDIGENOUS DESTINATION
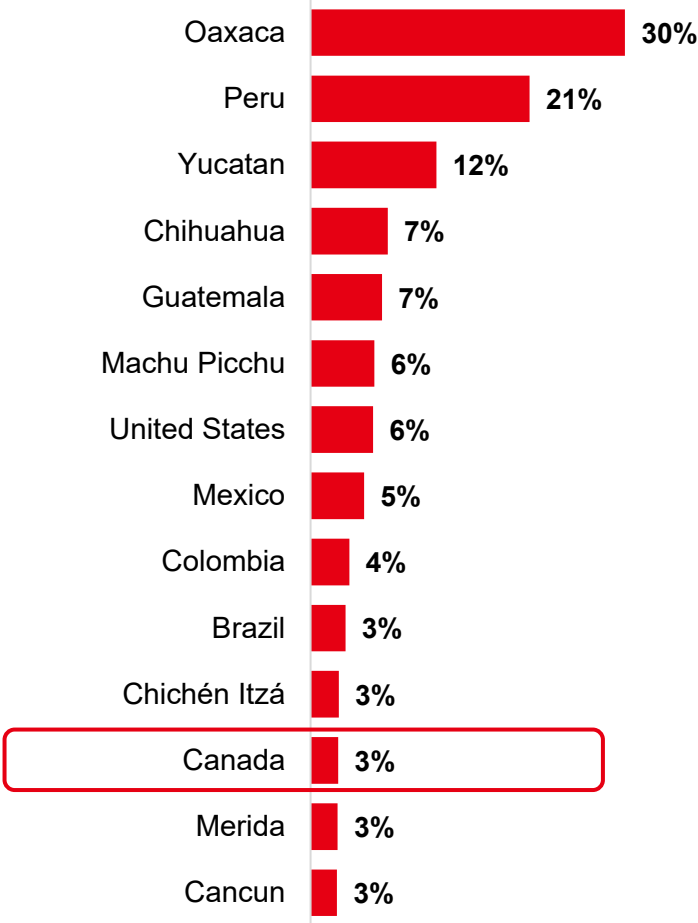
Destination	%
Oaxaca	30%
Peru	21%
Yucatan	12%
Chihuahua	7%
Guatemala	7%
Machu Picchu	6%
United States	6%
Mexico	5%
Colombia	4%
Brazil	3%
Chichén Itzá	3%
Canada	**3%**
Merida	3%
Cancun	3%

⬆ / ⬇ = significantly higher/lower result (2024 vs. 2023)

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1511)
B4. [DESCRIPTION] What destinations come to mind when thinking about **Indigenous tourism**? (Please list up to 3 destinations. You can mention destinations within or outside of Mexico and Central America.) [DESCRIPTION] Please note: You do not have to limit your responses to destinations you are considering for a holiday trip.

On an unaided basis, Mexican travellers are most likely to think of South America when thinking of Indigenous tourism destinations, while Canada was the second highest ranking destination outside of South America, after the United States.

Manitoulin Island
Ontario

Mexico GTRP – December 2024

14

INTEREST IN INDIGENOUS DESTINATIONS

Nearly seven in ten Mexican travellers are interested in participating in Indigenous experiences in Canada, with over four in ten being very interested.

Kelowna
British Columbia

Legend:
- ■ 5 - Very interested
- ■ 4
- ■ 3
- ■ 2
- ■ 1 - Not at all interested

Donut chart values:
- 45%
- 25%
- 15%
- 8%
- 6%
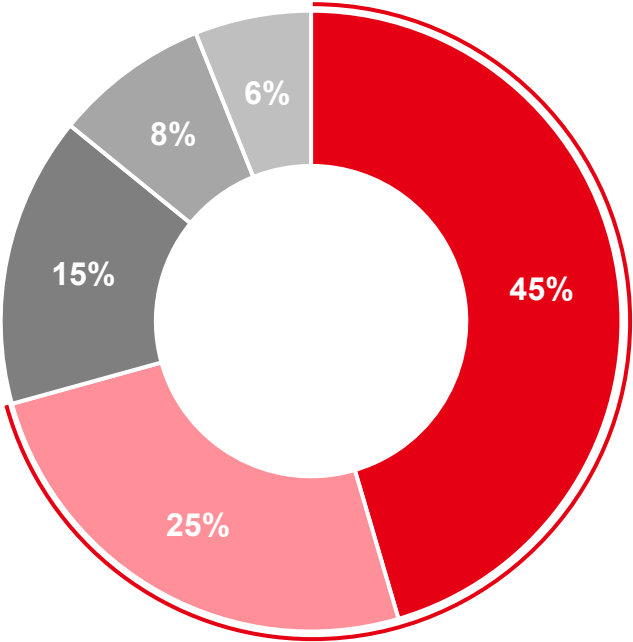
4 or 5 (out of 5)
69%

Note: respondents were asked either about interest in Indigenous destinations (C10) or factors to drive interest in Indigenous cultural experiences (C11)
Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=767)
C10. As you may or may not know, 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. How interested are you in participating in Indigenous cultural experiences and tourism activities in the following destinations?

FACTORS TO DRIVE INTEREST IN INDIGENOUS CULTURAL EXPERIENCES

Safety and comfort of the destination, followed by accessibility and ease of travel are the most mentioned factors driving interest in Indigenous cultural experiences.

Victoria
British Columbia

Factor	%
Safety and comfort of the destination	50%
Accessibility and ease of travel	43%
Authenticity of the experiences	33%
Personal interest in Indigenous cultures	30%
Cultural significance and uniqueness	29%
Recommendations and reviews	28%
Availability of full-day experiences (6+ hours)	19%
Smaller group size or intimate experiences	17%
Availability of short experiences (1-3 hours)	16%
Availability of information and marketing	12%

Note: respondents were asked either about interest in Indigenous destinations (C10) or factors to drive interest in Indigenous cultural experiences (C11)
Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=744)
C11. What factors would increase your interest in participating in Indigenous cultural experiences and tourism activities in a destination? (Select up to 3)

TRAVEL BEHAVIOURS

PREFERRED TIME OF YEAR FOR HOLIDAY TRIPS

Month	%	Season	Season %
December	38%		
January	13%	Winter	49%
February	10%		
March	18%		
April	21%	Spring	44%
May	17%		
June	21%		
July	32%	Summer	56%
August	26%		
September	18%		
October	17%	Fall	41%
November	20%		
Don't know	2%		
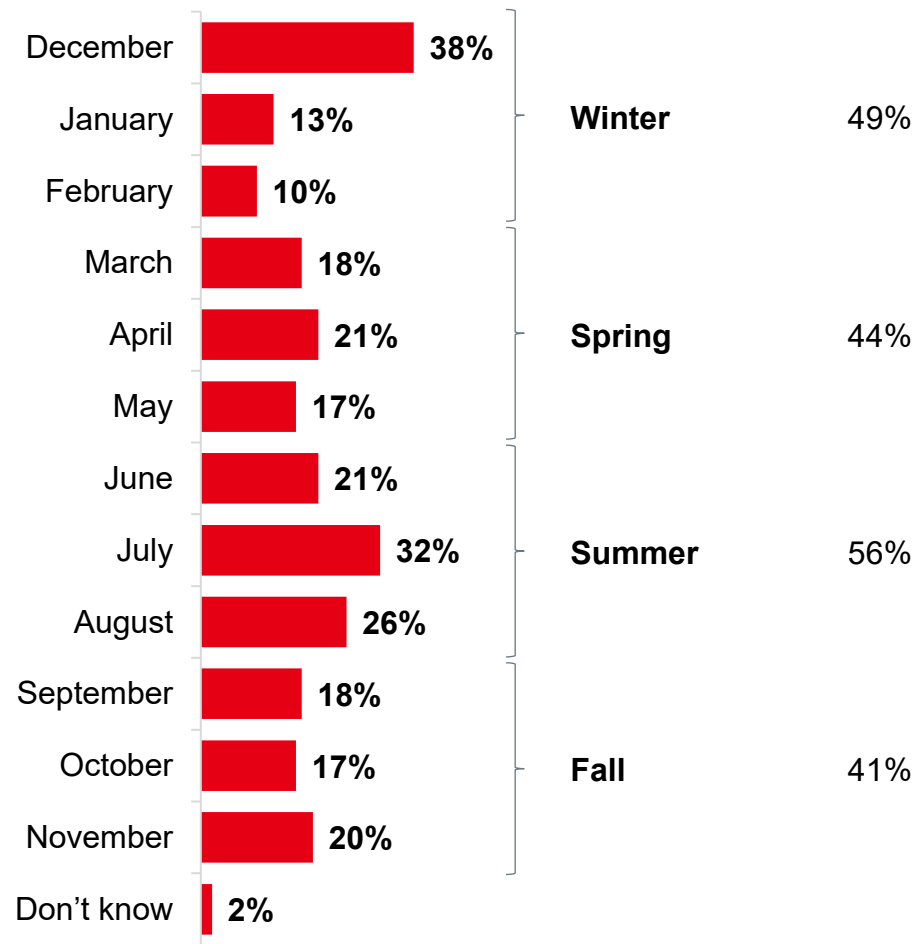
Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1511)
D1. In general, what time of year do you typically like to take holiday trips? Select all that apply

Though summer is the preferred time to take holiday trips, December is the most popular month among Mexican travellers.

Mexico GTRP – December 2024

Gros Morne National Park
Newfoundland and Labrador

18

GENERAL ACTIVITIES INTERESTED IN (FULL LIST)

Top activities when on a holiday include visiting oceanside beaches and going on nature walks.

Cup and Saucer Trail
Ontario

Activity	%
Oceanside beaches	64%
Nature walks	59%
Trying local food and drink	53%
Fine dining	52%
Natural attractions (e.g. scenic viewpoints, mountains, waterfalls)	48%
Nature parks	46%
Historical, archaeological or world heritage sites	43%
Local markets (e.g. public markets, farmers market, night markets)	42%
Lakeside beaches	40%
Art galleries or museums	39%
Northern lights	38%
Amusement or theme parks	36%
Learning about Indigenous culture, traditions or history	36%
Guided city tours	35%
City green spaces like parks or gardens	34%
Shopping for items that help me remember my trip	34%
Cultural or traditional festivals	33%
Hiking	33%
Guided nature tours	31%
Autumn colours	30%
Food and drink festivals or events	30%
Camping	29%
Nightlife	29%
Shopping for clothes and shoes	28%
Viewing wildlife or marine life	28%
Breweries or wineries	27%
Live shows (e.g. concerts, theatre, opera, symphony, etc.)	27%
Snowshoeing or cross country skiing	26%
Wilderness lodges	25%

Activity	%
Exploring places most tourists won't go to	24%
Guided train tours	24%
Music festivals	24%
Winter festivals	24%
Cruises	21%
Travelling to remote destinations	20%
Culinary tours or cooking classes	19%
Spring blossoms	19%
Guided boat tours	16%
Self-guided driving tours or road trips	16%
Kayaking, canoeing or paddle boarding	15%
Mountain biking	14%
Movie festivals	14%
Spa or wellness centres	14%
Sporting events (to attend or participate)	14%
Comedy festivals	13%
Fishing or angling	13%
Agricultural or country farm tours	12%
Downhill skiing or snowboarding	12%
Guided airplane or helicopter tours	11%
Renting a recreational vehicle (RV)	11%
Road cycling	11%
Casual biking	9%
Shopping for luxury items	8%
Rodeos	7%
Heli-skiing	6%
Golfing	5%
Hunting	5%

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1511)
D4. In general, what activities or places are you interested in while on holiday? (Select all that apply)

Mexico GTRP – December 2024   19

TOP 3 MOST IMPORTANT SUSTAINABILITY EFFORTS

The most important sustainability efforts are the conservation of natural areas in the destination, followed by knowing that their money is supporting the local community.
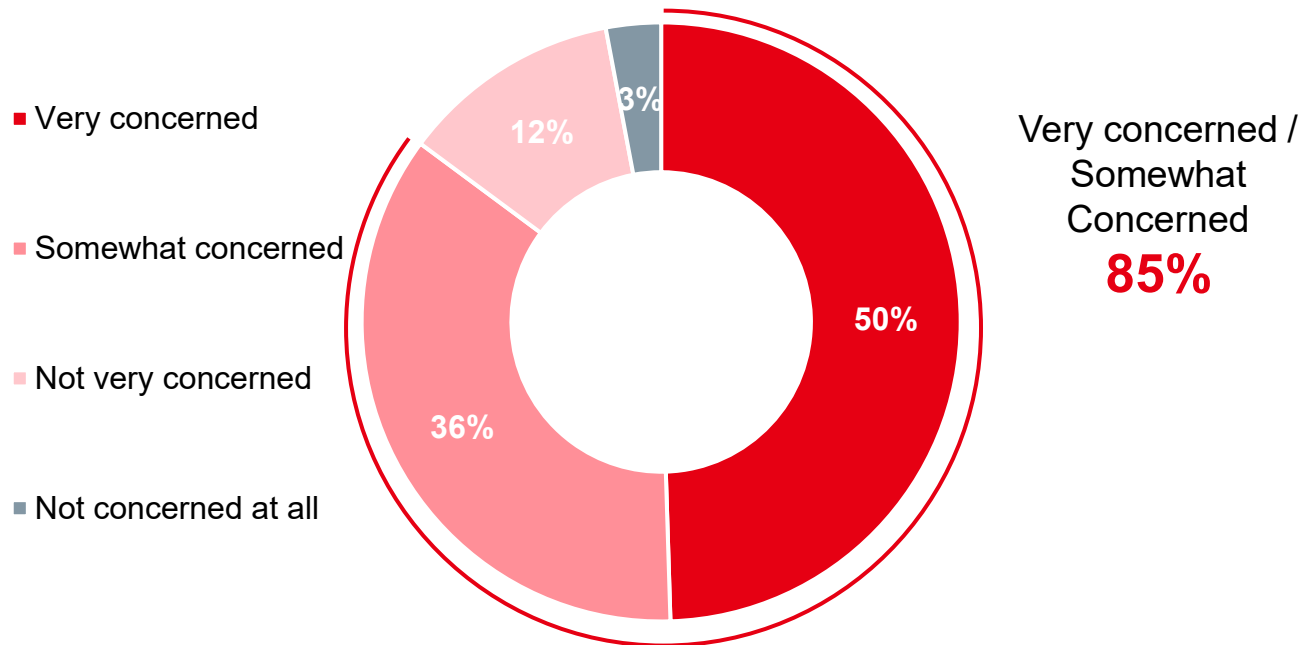
Sustainability effort	%
Conservation of natural areas in my destination	45%
Knowing that my money is directly supporting the local community	36%
Dining options that use local and/or organic ingredients	30%
Knowing that the local culture of my destination is not negatively impacted by tourism	30%
Eco-tour activities in my destination	29%
Knowing that the local community in my destination is open and welcoming to travellers	29%
Eco-friendly transportation options in my destination (e.g., public transport, ride share, etc.)	25%
Eco-friendly accommodations in my destination	22%
Efforts to reduce overcrowding in my destination	21%
None of the above	4%

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".

Niagara Falls
Ontario

Note: respondents were asked either about most important sustainability efforts (D8) or barriers to sustainable travel (D9)
Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=730)
D8. What are the top 3 sustainability efforts that are most important to you when selecting a holiday destination? Select up to three choices.

IMPACT OF EXTREME WEATHER EVENTS ON TRAVEL PLANS

- ■ Very concerned
- ■ Somewhat concerned
- ■ Not very concerned
- ■ Not concerned at all

3%

12%

50%

36%

Very concerned / Somewhat Concerned

85%

**87%** state extreme weather events will **significantly or moderately impact** their travel decisions in the next year

⬆ / ⬇ = significantly higher/lower result (2024 vs. 2023)

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1511)
D10. 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. How concerned are you about extreme weather events affecting your travel plans?
D15. To what extent do you expect extreme weather events to impact your future travel decisions in the next year?

DESTINATION CANADA

Over eight in ten Mexican travellers are concerned about extreme weather impacting their travel plans, with almost nine in ten stating that extreme weather will impact their future travel decisions.

Mexico GTRP – December 2024
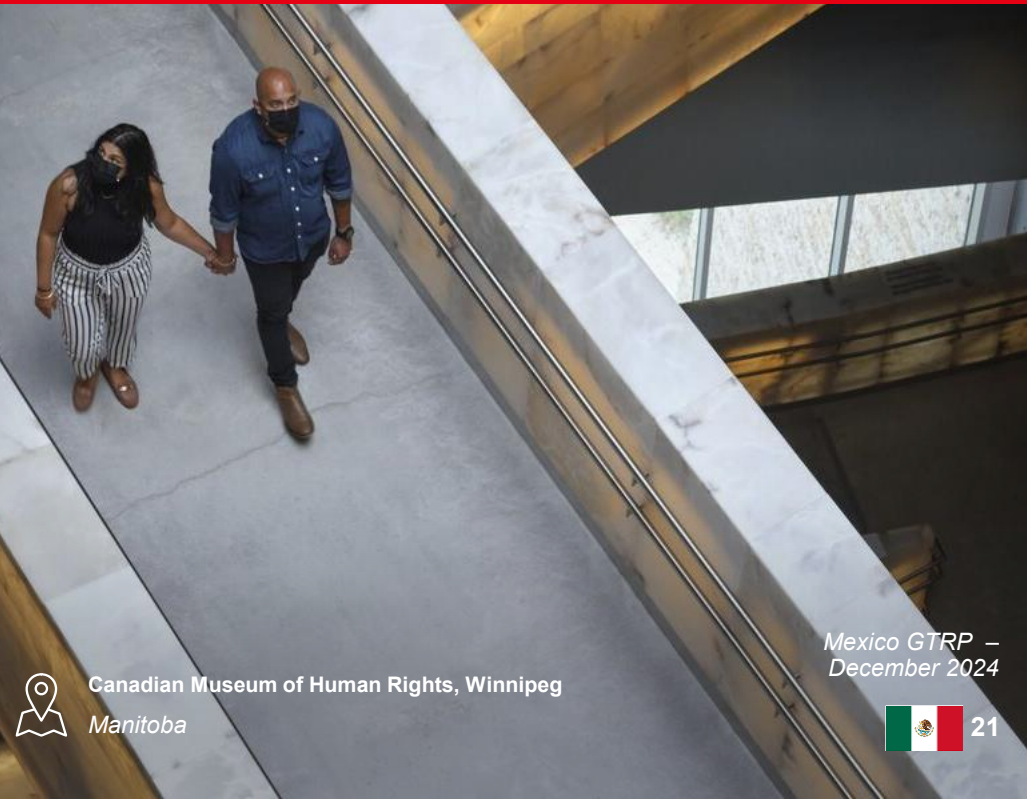
Canadian Museum of Human Rights, Winnipeg
Manitoba

21

MOST RECENT TRIP

MAIN PURPOSE OF RECENT TRIP

Chart: Main purpose of recent trip
- Holiday: 58%
- Visit family and friends: 17%
- Combined business / personal reasons: 16%
- Personal event (e.g., wedding, funeral): 5%
- Education: 3%
- Other: 1%
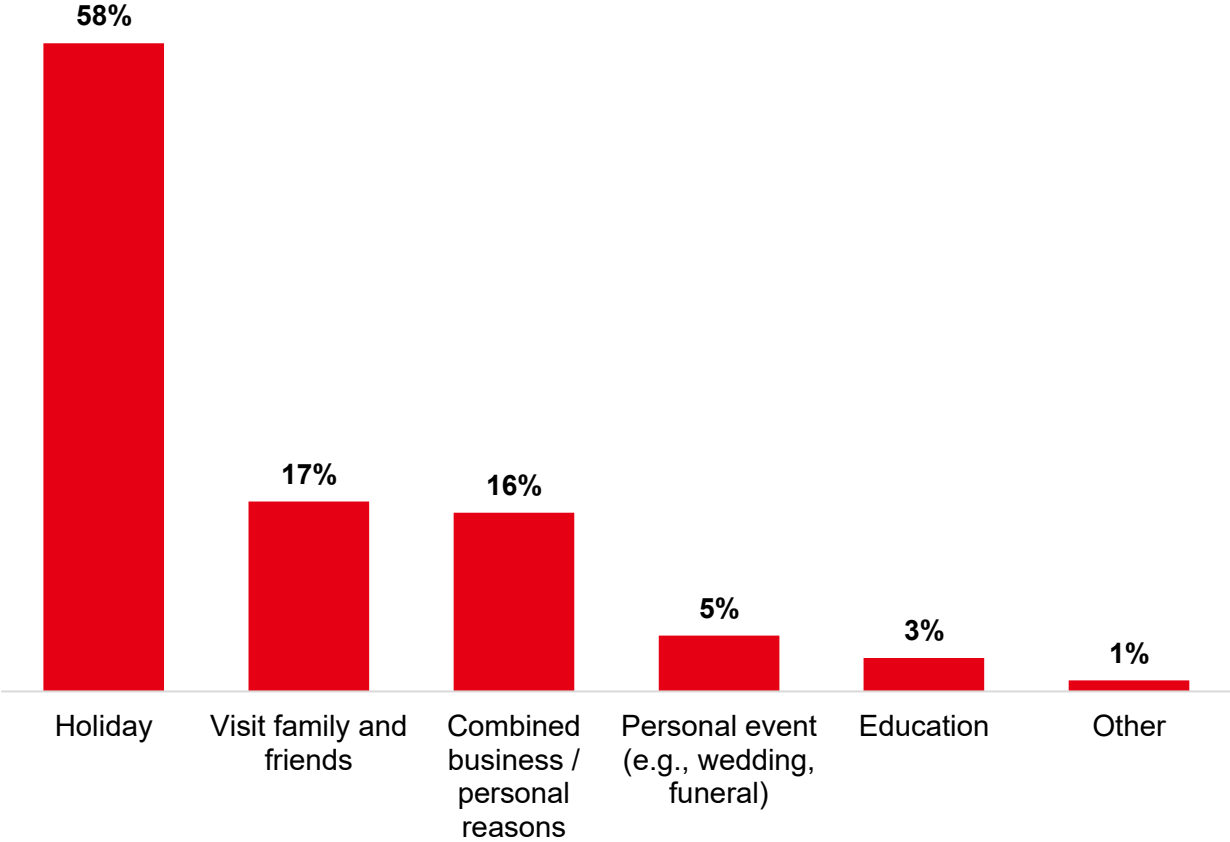
Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to Canada (n=331)
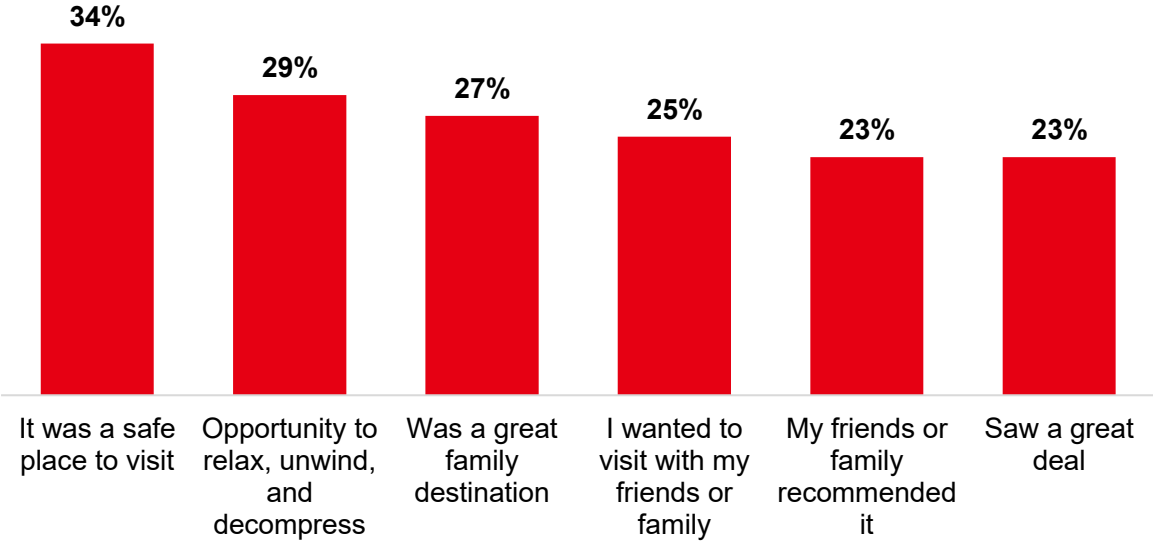F2. What was the main purpose of this trip? (Select one)

Nearly six in ten Mexican travellers to Canada in the past three years were going on a holiday trip.

Mexico GTRP – December 2024

Nahanni National Park Reserves
Northwest Territories

FACTORS IN CHOOSING DESTINATION FOR RECENT TRIP (TOP 6)

34%	29%	27%	25%	23%	23%
It was a safe place to visit	Opportunity to relax, unwind, and decompress	Was a great family destination	I wanted to visit with my friends or family	My friends or family recommended it	Saw a great deal

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to Canada, Took a holiday (n=192)
F3. Which of the following factored into your choice of destination for this trip? (Select all that apply)

The top factors for choosing to visit Canada for their most recent trip were safety, the opportunity to relax, and being a great family destination.

Mexico GTRP – December 2024

Fundy Trail Provincial Park
New Brunswick

24

NIGHTS SPENT DURING RECENT TRIP
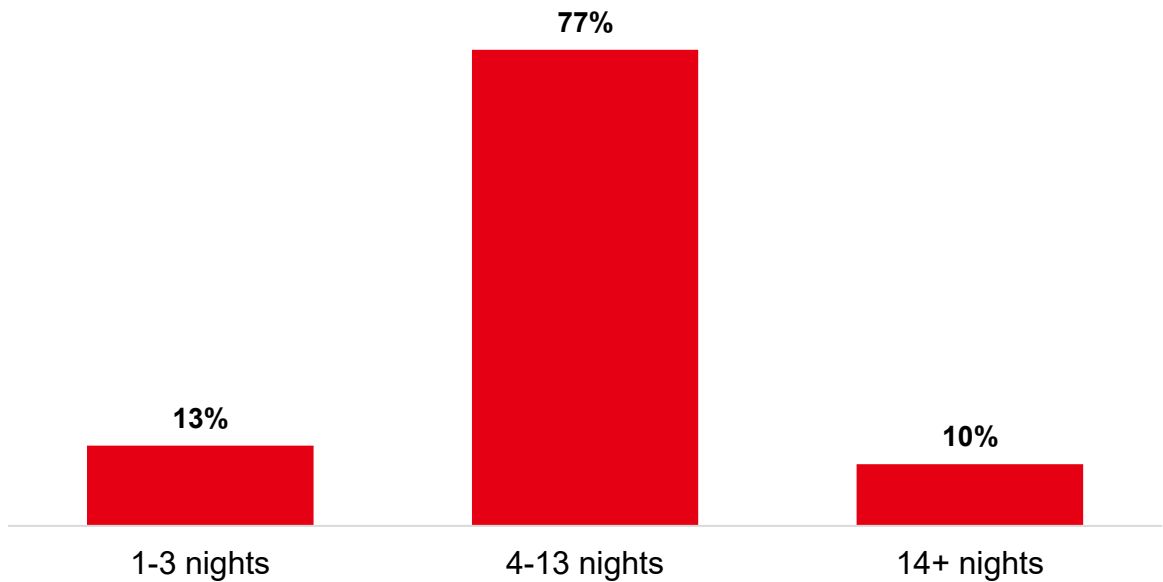
77% — 4-13 nights

13% — 1-3 nights

10% — 14+ nights

Almost eight in ten Mexican travellers to Canada stayed for 4-13 nights.

Mexico GTRP – December 2024
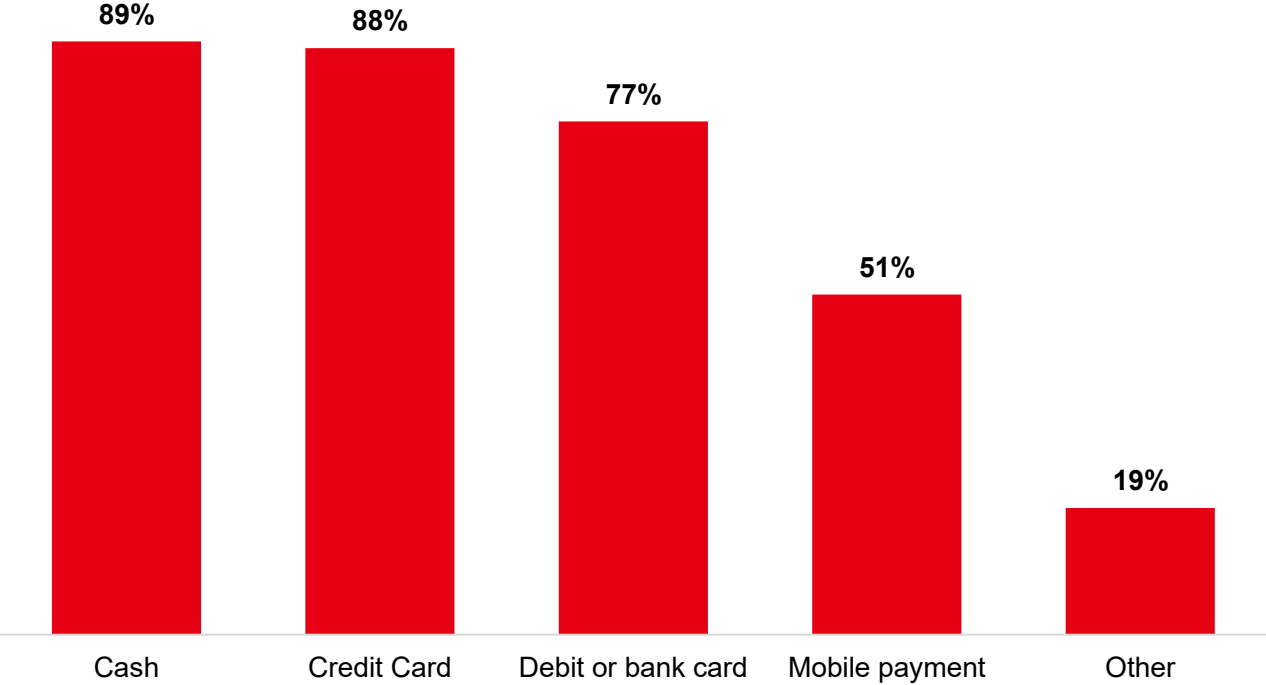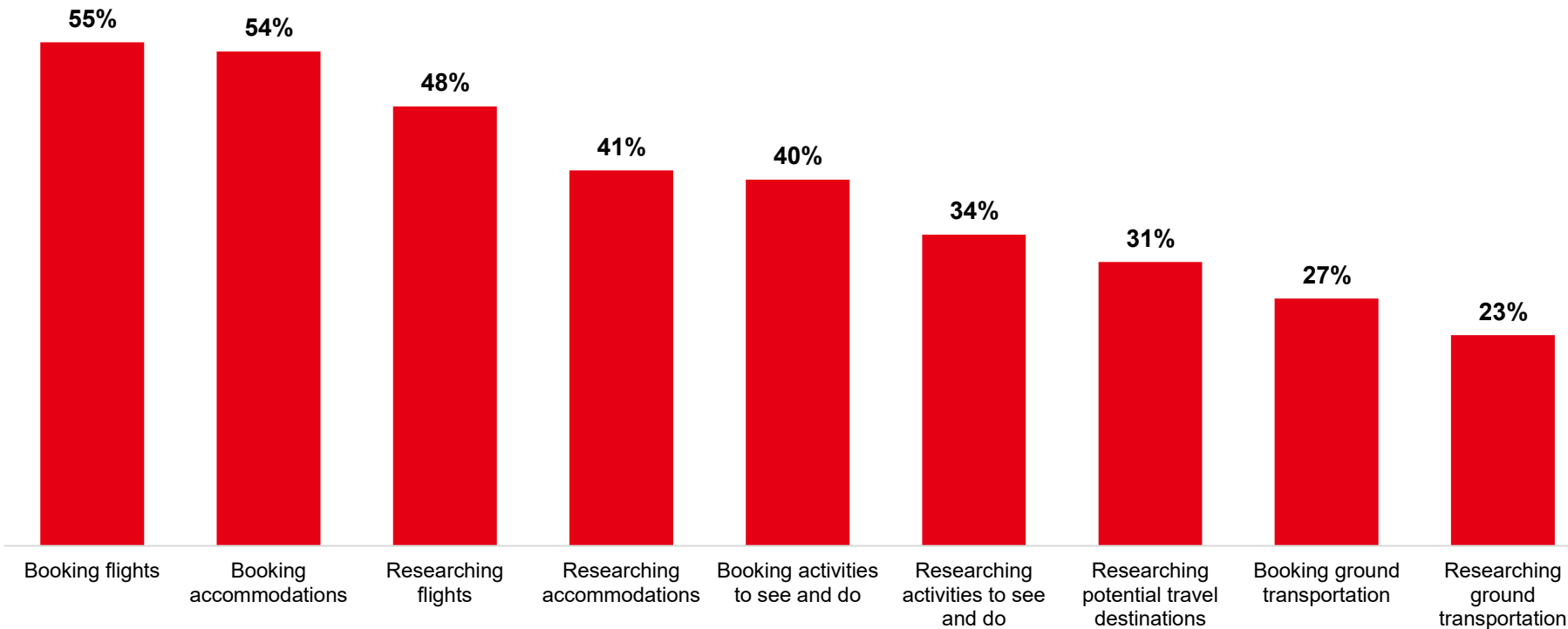
Barren Canyon, Algonquin Park
Ontario

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to Canada past 3 years (n=331)
F4. How many nights did you spend in this destination?

PAYMENT METHODS FOR RECENT TRIP

89% Cash
88% Credit Card
77% Debit or bank card
51% Mobile payment
19% Other

The most common payment methods Mexican travellers used for their most recent trip to Canada were cash and credit card.

Mexico GTRP – December 2024

Snowking Winter Festival, Yellowknife
Northwest Territories

DESTINATION CANADA

26

TRAVEL AGENTS/TOUR OPERATOR USAGE FOR RECENT TRIP (AMONG THOSE WHO USED A TRAVEL AGENT/TOUR OPERATOR)

53% used a **travel agent**

Over one half of recent travellers to Canada used a travel agent, most likely for booking flights or accommodations.

Category	Percentage
Booking flights	55%
Booking accommodations	54%
Researching flights	48%
Researching accommodations	41%
Booking activities to see and do	40%
Researching activities to see and do	34%
Researching potential travel destinations	31%
Booking ground transportation	27%
Researching ground transportation	23%

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to Canada past 3 years (n=331)
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)
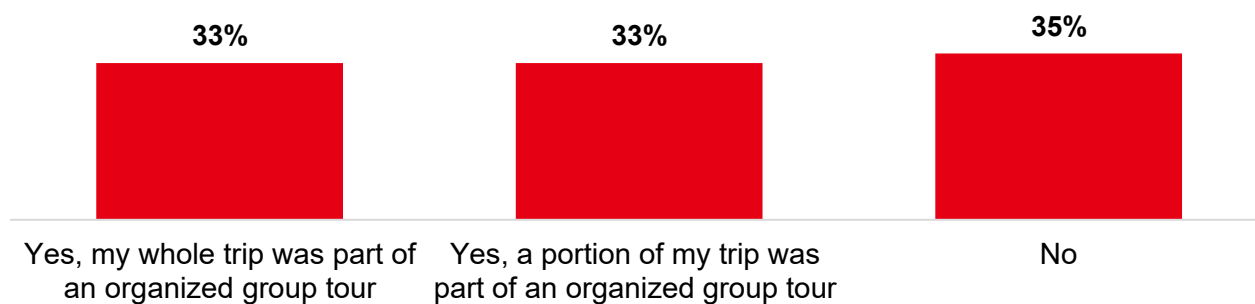F10. Which of the following did a travel agent or tour operator help you with? Travelled to Canada past 3 years, Used a Travel Agent/Tour Operator (n=180)

ORGANIZED GROUP TOUR FOR RECENT TRIP

Organized group tours were popular among recent Mexican travellers, with one third having their whole trip as part of an organized tour, and another one third having a portion of their trip as part of an organized tour.

33%

33%

35%

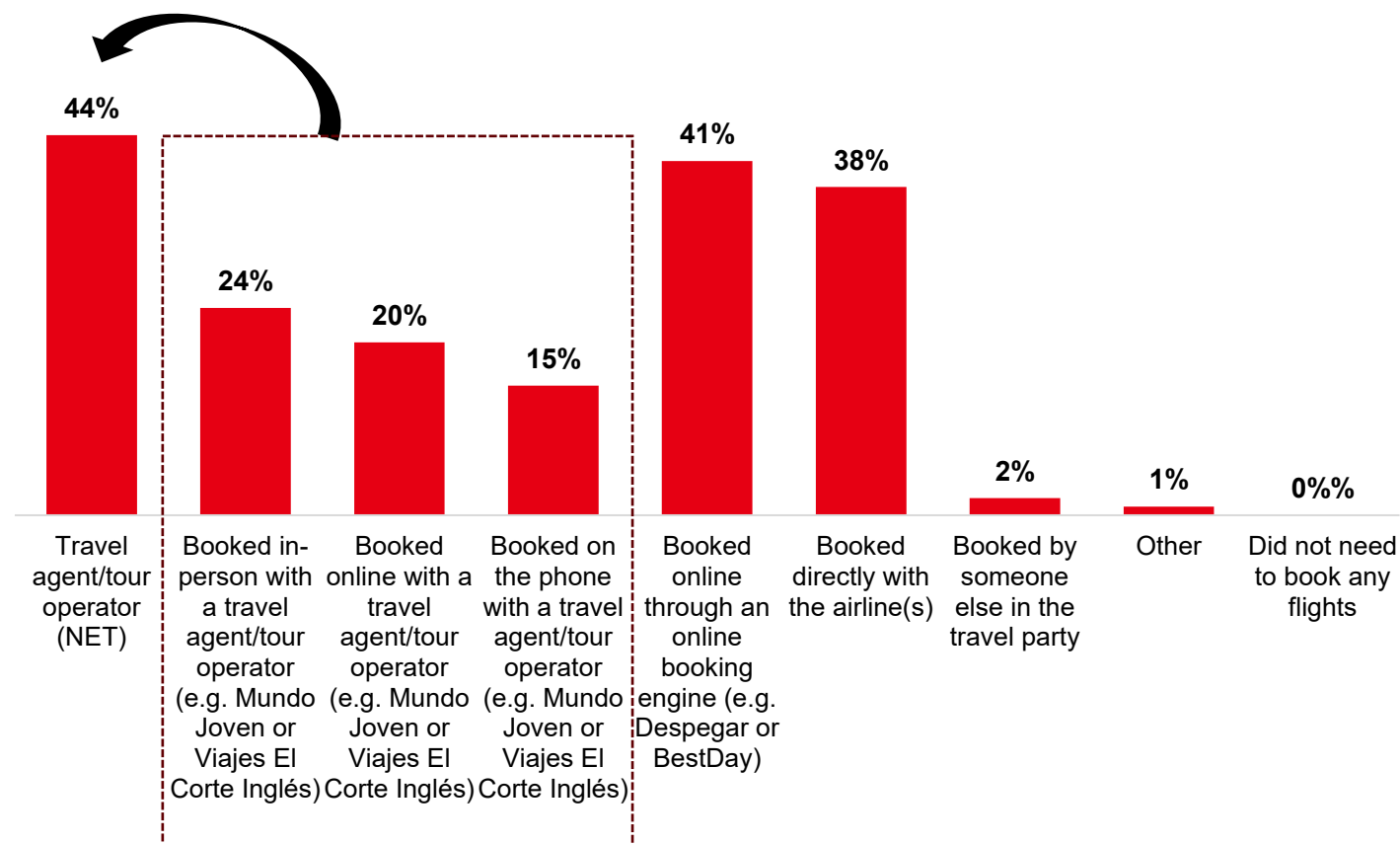Yes, my whole trip was part of an organized group tour

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

No

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to Canada past 3 years (n=331)
F11. 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?

Mexico GTRP – December 2024

Saskatoon
Saskatchewan

28

BOOKING FLIGHTS FOR RECENT TRIP

Chart: How did you book your flight for this trip?

- Travel agent/tour operator (NET): 44%
- Booked in-person with a travel agent/tour operator (e.g. Mundo Joven or Viajes El Corte Inglés): 24%
- Booked online with a travel agent/tour operator (e.g. Mundo Joven or Viajes El Corte Inglés): 20%
- Booked on the phone with a travel agent/tour operator (e.g. Mundo Joven or Viajes El Corte Inglés): 15%
- Booked online through an online booking engine (e.g. Despegar or BestDay): 41%
- Booked directly with the airline(s): 38%
- Booked by someone else in the travel party: 2%
- Other: 1%
- Did not need to book any flights: 0%

Over four in ten recent Mexican travellers to Canada used a travel agent or tour operator to book flights, while another four in ten booked through an online booking engine.
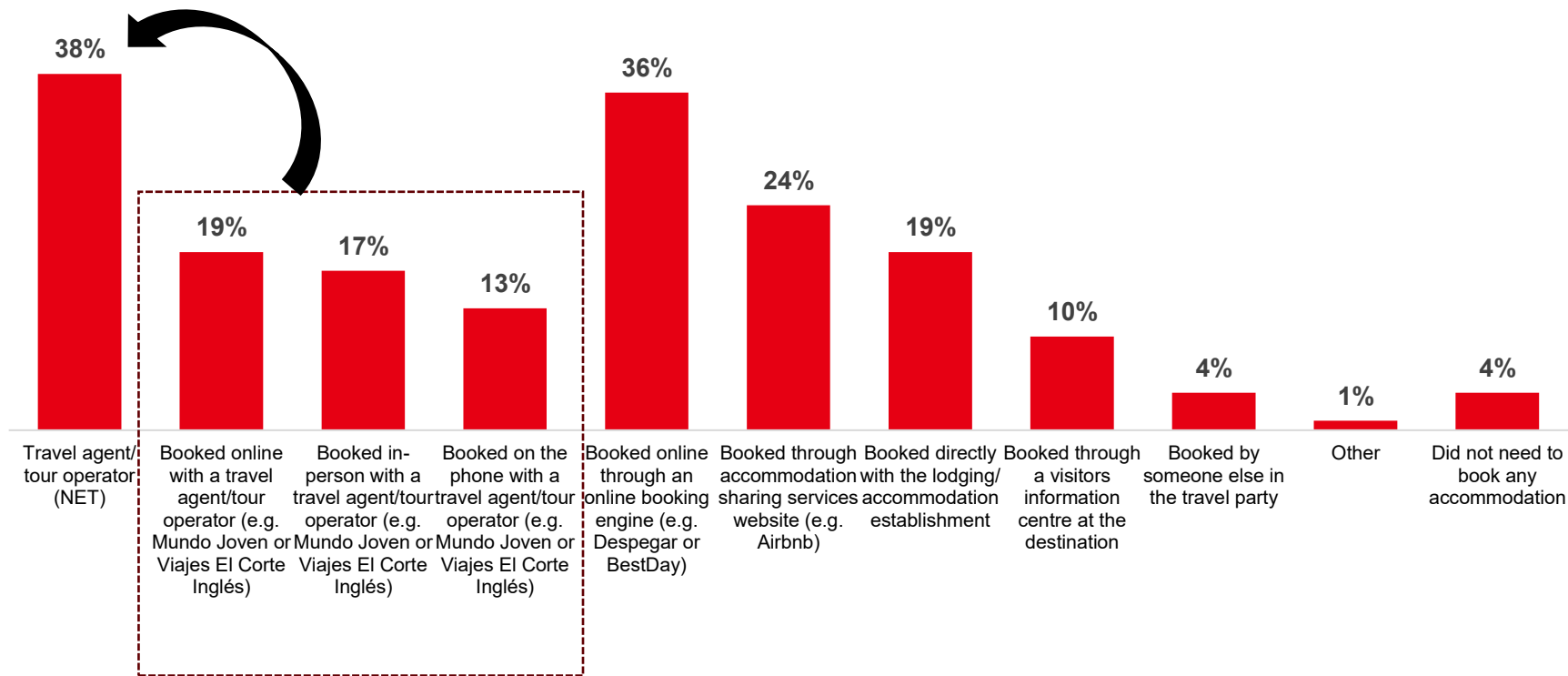
Montmorency Falls Park, Quebec City
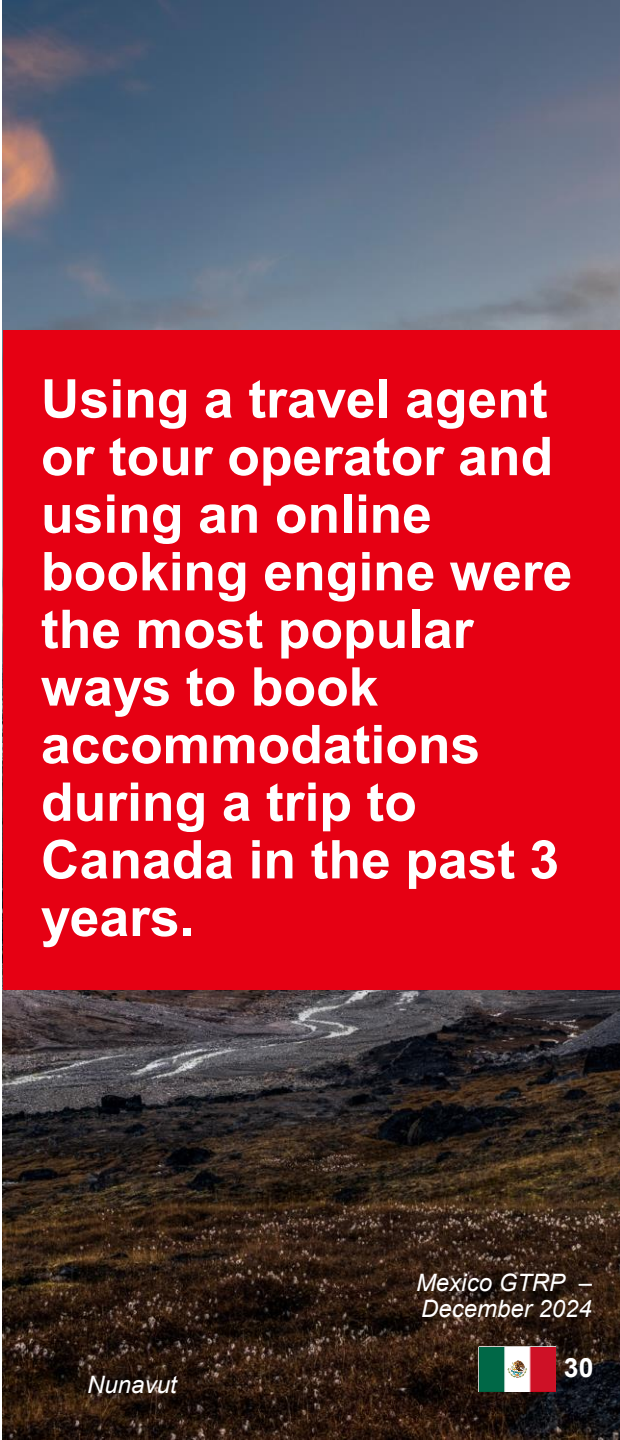*Quebec*

Mexico GTRP – December 2024
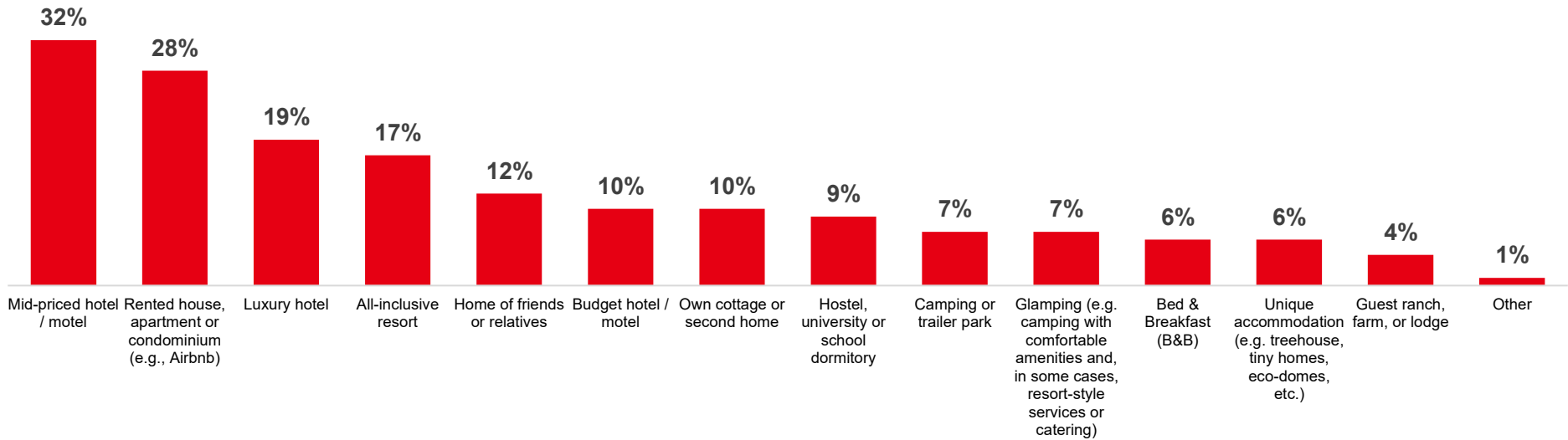
BOOKING ACCOMMODATIONS FOR RECENT TRIP

Using a travel agent or tour operator and using an online booking engine were the most popular ways to book accommodations during a trip to Canada in the past 3 years.

Category	%
Travel agent/tour operator (NET)	38%
Booked online with a travel agent/tour operator (e.g. Mundo Joven or Viajes El Corte Inglés)	19%
Booked in-person with a travel agent/tour operator (e.g. Mundo Joven or Viajes El Corte Inglés)	17%
Booked on the phone with a travel agent/tour operator (e.g. Mundo Joven or Viajes El Corte Inglés)	13%
Booked online through an online booking engine (e.g. Despegar or BestDay)	36%
Booked through accommodation sharing services website (e.g. Airbnb)	24%
Booked directly with the lodging/accommodation establishment	19%
Booked through a visitors information centre at the destination	10%
Booked by someone else in the travel party	4%
Other	1%
Did not need to book any accommodation	4%

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to Canada past 3 years (n=331)
F13. How did you book your accommodation for this trip? (Select all that apply)

Mexico GTRP – December 2024

Nunavut

30

TYPE OF ACCOMMODATIONS FOR RECENT TRIP

Chart: Type of accommodations for recent trip

- Mid-priced hotel / motel: 32%
- Rented house, apartment or condominium (e.g., Airbnb): 28%
- Luxury hotel: 19%
- All-inclusive resort: 17%
- Home of friends or relatives: 12%
- Budget hotel / motel: 10%
- Own cottage or second home: 10%
- Hostel, university or school dormitory: 9%
- Camping or trailer park: 7%
- Glamping (e.g. camping with comfortable amenities and, in some cases, resort-style services or catering): 7%
- Bed & Breakfast (B&B): 6%
- Unique accommodation (e.g. treehouse, tiny homes, eco-domes, etc.): 6%
- Guest ranch, farm, or lodge: 4%
- Other: 1%

Nearly one third of recent Mexican travellers visiting Canada stayed at a mid-priced hotel or motel. Almost three in ten also stayed at a short-term rental.

Rideau Canal
Ontario

Mexico GTRP – December 2024

31

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to Canada past 3 years, Booked Accommodations (n=317)
F14. Which type of accommodation did you stay in during this trip? (Select all that apply)

THANK YOU

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

DESTINATION CANADA

CANADIAN TOURISM DATA collective