

# 2025 GLOBAL TRAVELLER RESEARCH PROGRAM

## MEXICO HIGHLIGHTS REPORT



Canada



Thompson Manitoba



CANADIAN TOURISM DATA  
COLLECTIVE

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# 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.



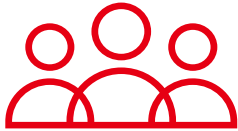

**Timing of Fieldwork**

**December 1<sup>st</sup> – 15<sup>th</sup>, 2025**



**Geographical Definition for Qualified Trips**

**Outside of: Mexico and Central America**



**Sample Distribution**

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

<b>Highly Engaged Guest (HEG) Audience:</b>	<b>1061</b>
<b>Other travellers:</b>	<b>446</b>
<b>Total sample size:</b>	<b>1507</b>

In 2023, Destination Canada switched research providers to YouGov Canada, with the project being migrated over to YouGov’s proprietary panel.



Consideration for Canada continues to be strong among Mexican travellers, with the next 2-year immediate potential for Canada being 7.5M. The current geopolitical climate has also aided in Canada's popularity among Mexican travellers, with 47% stating that they are more likely to visit Canada as a result.



Potential visitors to Canada are more likely to consider a visit during the summer months, with Ontario and Quebec accounting for the highest number of potential visitors.



Mexican travellers are most likely to base an entire holiday around oceanside beaches and fine dining, while also being interested in nature walks and trying local cuisine.



On an unaided basis, Canada remains the second highest ranking destination outside of South America as an Indigenous tourism destination. There is a high level of interest in Indigenous cultural experiences among Mexican travellers who seek safety and comfort in experiences that are set in the natural environment.



While the use of AI is common (and increasing among younger travellers), travel agents remain the most likely way for Mexican travellers to book flights and accommodations.

# MARKET SIZING



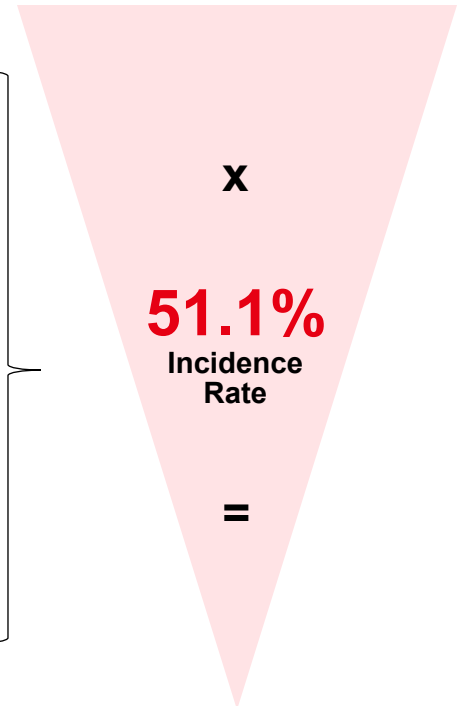
Killarney Provincial Park  
Ontario



# MARKET SIZING – LONG-HAUL TRAVELLERS

**Total Mexico Population within 3 target cities\* 18+ 24,454,000**

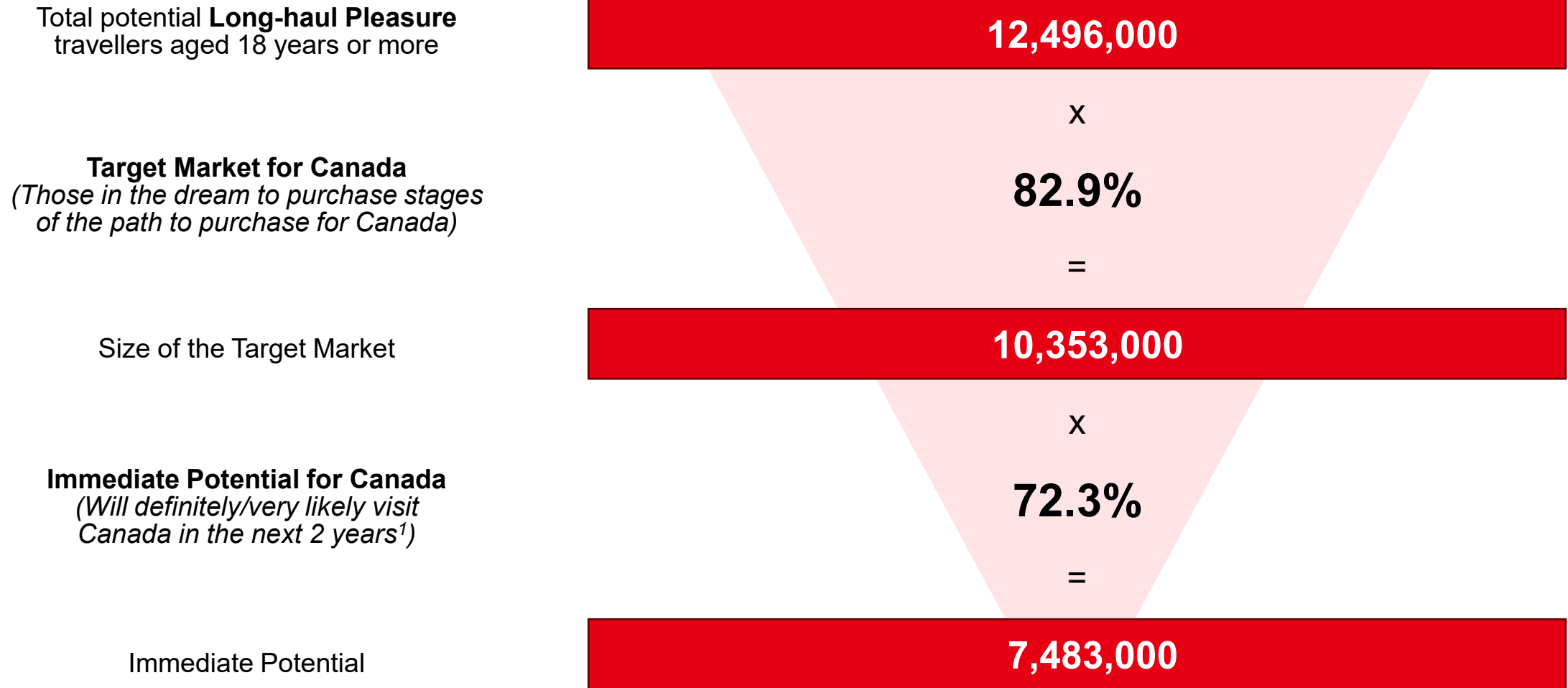
38% Took a Long-Haul <sup>^</sup> Pleasure Trip in the Past 3 Years (Recent Long-Haul Travellers)	9,292,500
42% Plan To Take a Long-Haul Pleasure Trip In Next 2 Years (Upcoming Long-Haul Travellers)	10,270,500



**Total potential long-haul pleasure travellers (past 3 years/planned next 2 years) 12,496,000**

\* 3 target cities = Mexico City, Monterrey, Guadalajara  
<sup>^</sup> 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)



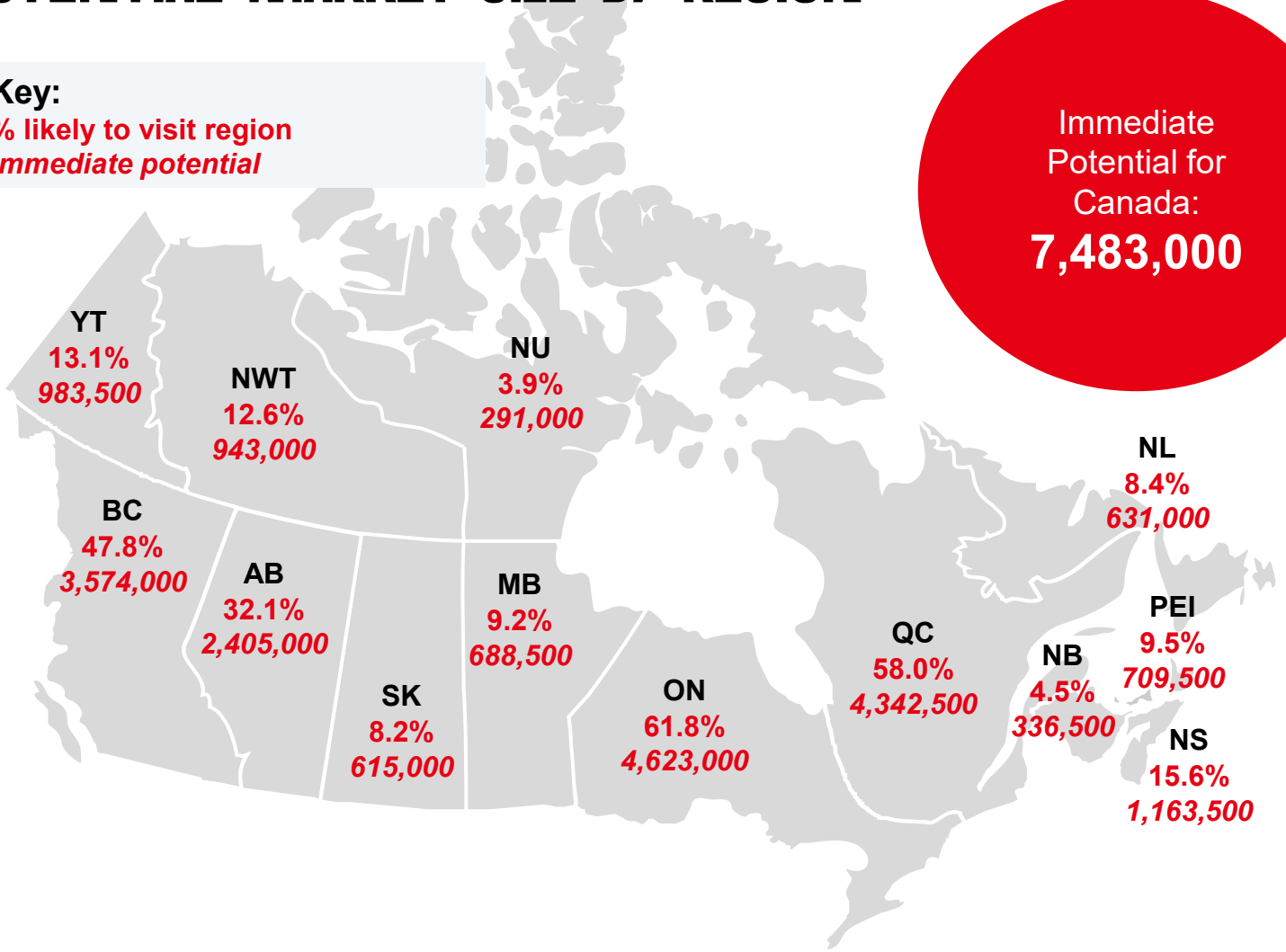
<sup>1</sup> Includes respondents likely to visit Canada for a trip of 1 to 3 nights, or a trip of 4 nights or more.  
Base: Target market for Canada = long-haul pleasure travellers (past 3 years or next 2 years) (n=1507); Immediate potential for Canada = dream to purchase stages for P2P for Canada (n=1255)  
C1. Which of the following best describes your current situation when thinking about each of the following destinations for a vacation trip? (Select one for each)  
E1. Realistically, how likely are you to take a vacation trip to Canada in the **next 2 years**? (Select one)

# POTENTIAL MARKET SIZE BY REGION

Ontario and Quebec have the potential to draw in over 4.3 million Mexican travellers each over the next 2 years.

**Key:**  
 % likely to visit region  
*Immediate potential*

Immediate Potential for Canada:  
**7,483,000**

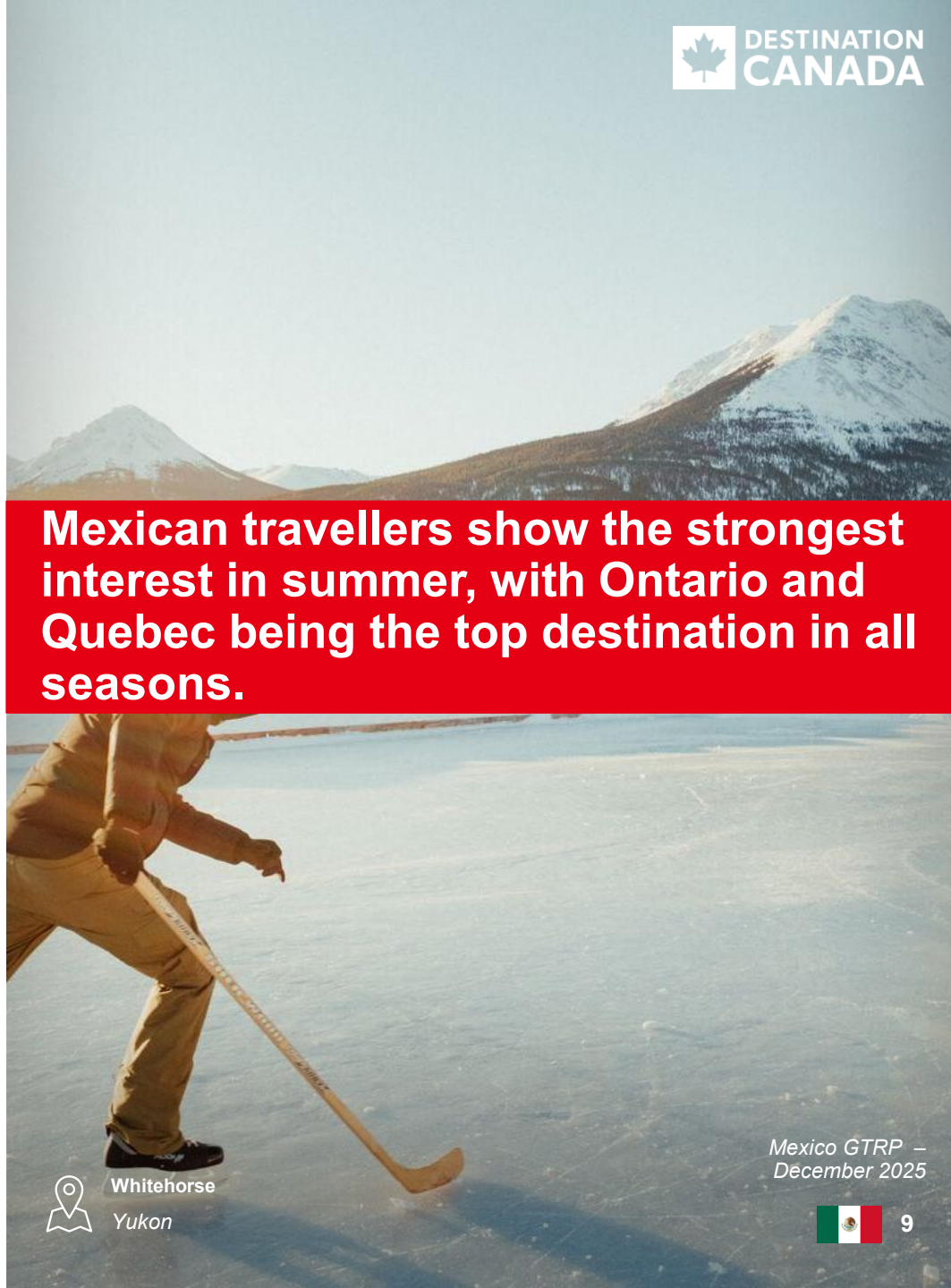


Nunavut

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=1255)  
 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%	15%	18%	14%
Alberta	9%	11%	11%	10%
Saskatchewan	3%	3%	3%	3%
Manitoba	4%	4%	3%	2%
Ontario	17%	18%	23%	19%
Quebec	17%	16%	21%	17%
New Brunswick	2%	2%	2%	2%
Nova Scotia	5%	5%	5%	5%
Prince Edward Island	2%	3%	4%	3%
Newfoundland & Labrador	3%	3%	3%	3%
Yukon	4%	5%	4%	5%
Northwest Territories	4%	5%	3%	4%
Nunavut	1%	1%	2%	2%

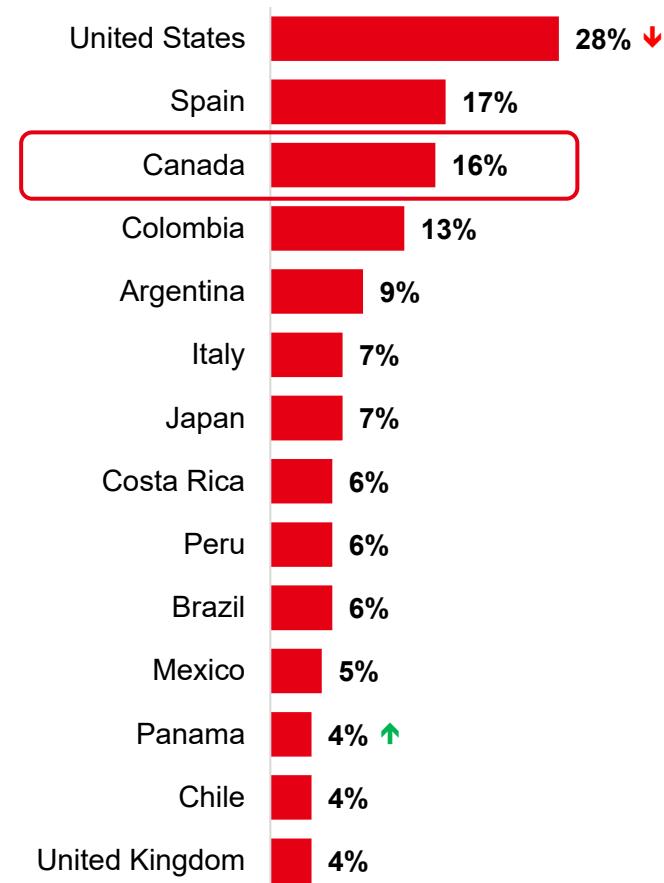


**Mexican travellers show the strongest interest in summer, with Ontario and Quebec being the top destination in all seasons.**

Base: Those in the dream to purchase stages of the path to purchase for Canada & definitely/likely to take a trip to Canada (n=1255) E3a-m. During what time of year are you considering visiting [PROVINCE]? (Select all that apply)

# CONSIDERING CANADA AS A TRAVEL DESTINATION

# UNAIDED DESTINATION CONSIDERATION (NEXT 2 YEARS)<sup>1</sup>



On an unaided basis, Canada ranks third as a destination Mexican travellers are considering. Canada's scores remain stable year over year, while US consideration has declined significantly.

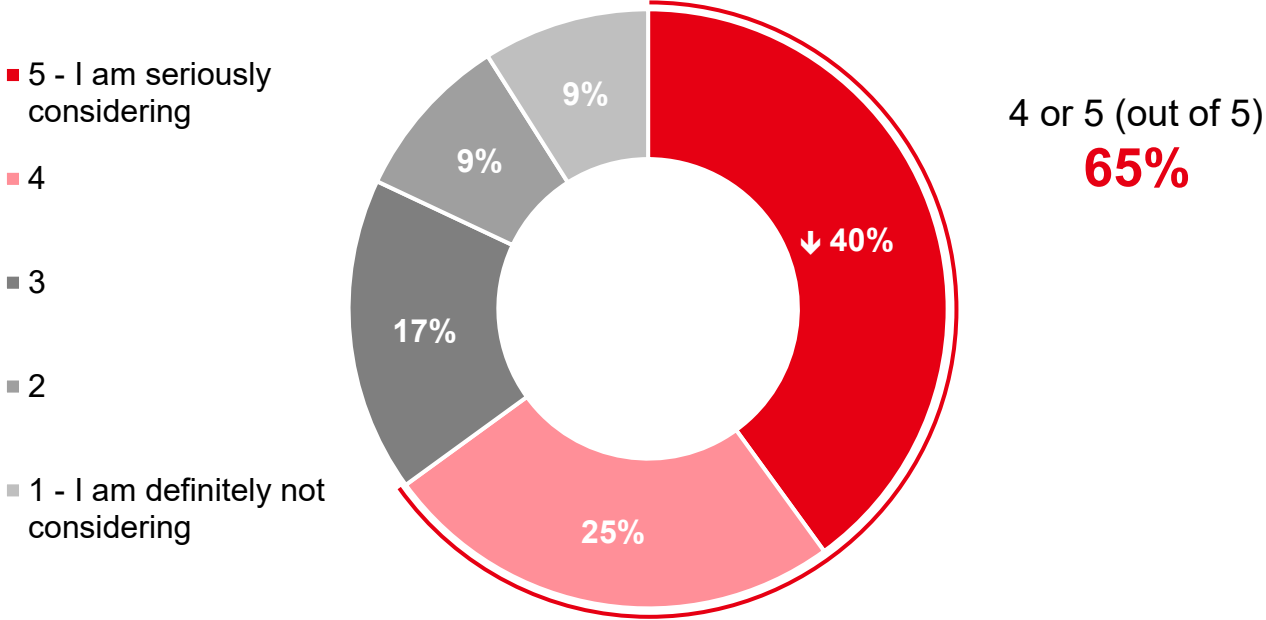


Tofino  
British Columbia

<sup>1</sup> Roll-up of brand mentions by country (e.g., percentage who said "Canada" or any destination in Canada).  
Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1507)  
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 (2025 vs. 2024)

# AIDED CONSIDERATION FOR CANADA (NEXT 2 YEARS)

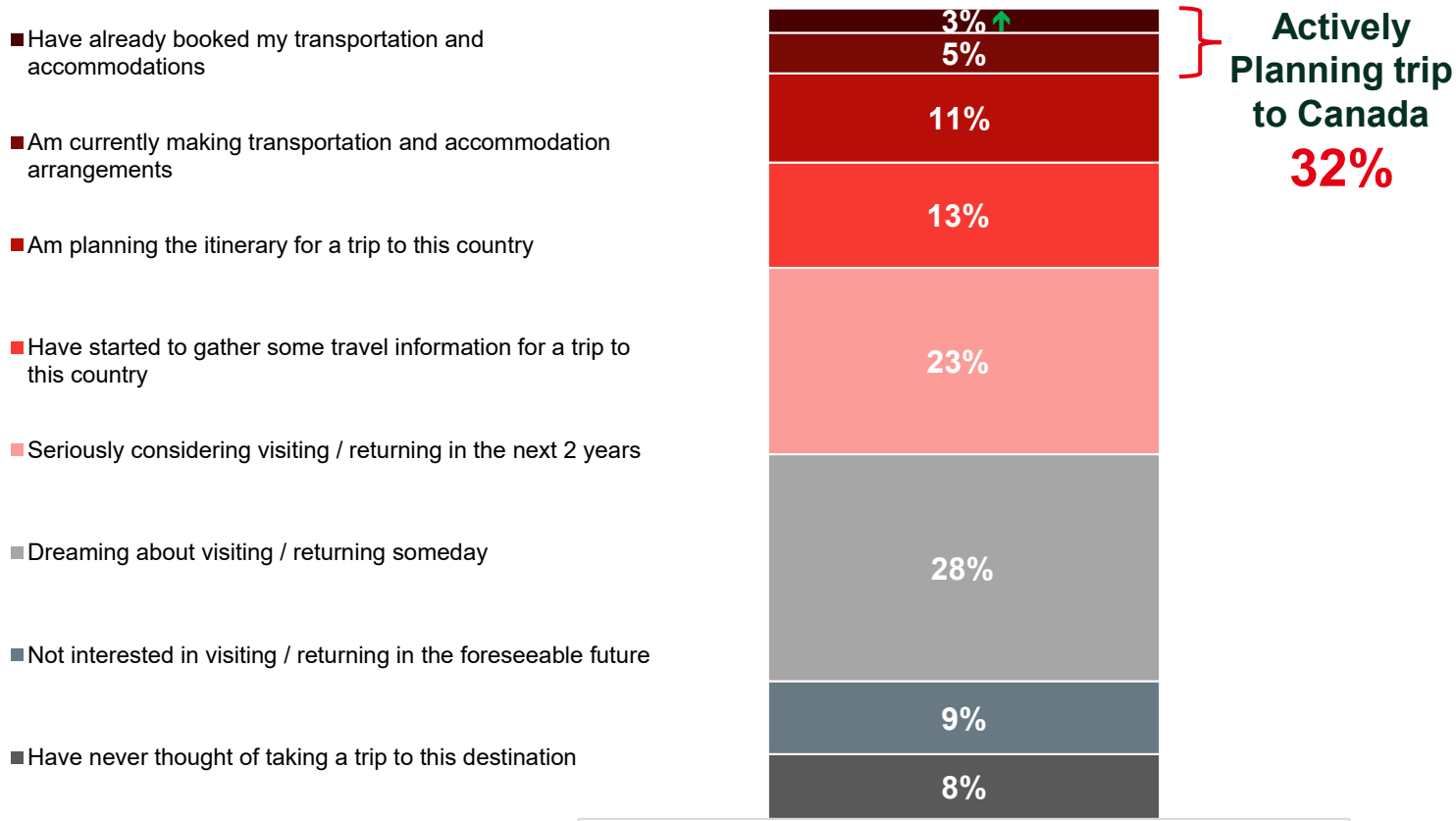


Nearly two thirds of Mexican travellers would consider visiting Canada in the next 2 years, on par with the previous year although seriously considering Canada has decreased.

↑ / ↓ = significantly higher/lower result (2025 vs. 2024)

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1507)  
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'.

# STAGE IN THE PURCHASE CYCLE FOR CANADA



↑ / ↓ = significantly higher/lower result (2025 vs. 2024)

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=1507)  
 C1. Which of the following best describes your current situation when thinking about each of the following destinations for a vacation trip? (Select one for each)



Nearly one third of Mexican travellers are actively planning a trip to Canada, consistent with 2024.

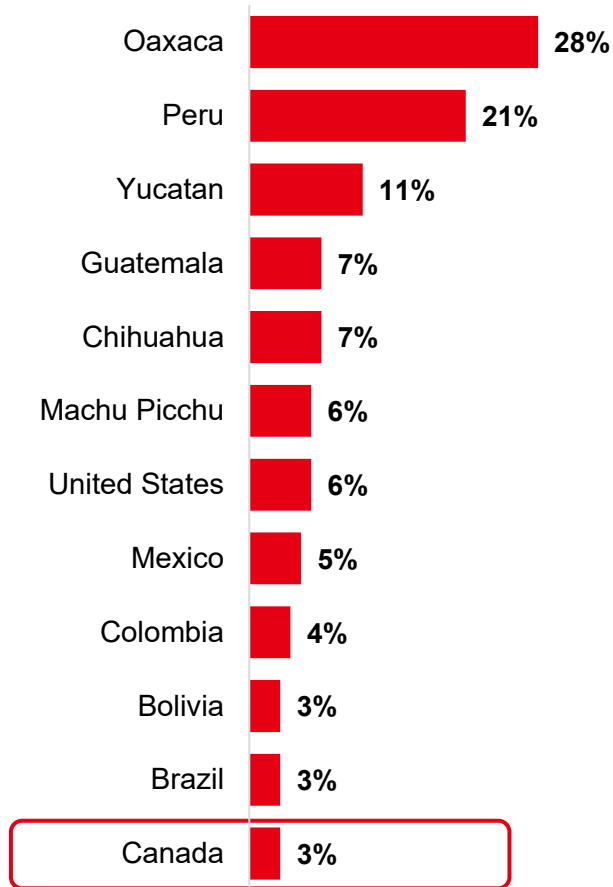
# INDIGENOUS TRAVEL



Carcross  
Yukon



# UNAIDED INDIGENOUS DESTINATION



↑ / ↓ = significantly higher/lower result (2025 vs. 2024)

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1507)

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.

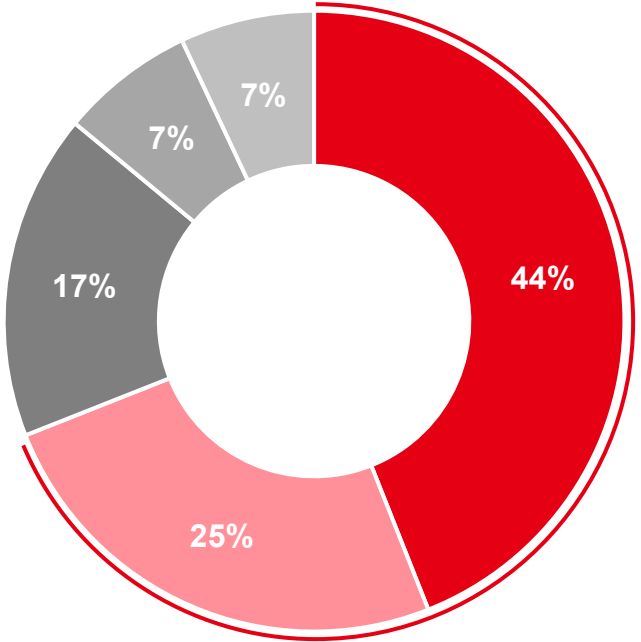
**On an unaided basis, Mexican travellers most often associate Indigenous tourism with South America. Outside the region, Canada ranks second after the United States.**



# INTEREST IN INDIGENOUS DESTINATIONS

Nearly seven in ten Mexican travellers are interested in participating in Indigenous experiences in Canada, consistent with scores seen last year.

- 5 - Very interested
- 4
- 3
- 2
- 1 - Not at all interested



**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=736)  
 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?  
 ↑ / ↓ = significantly higher/lower result (2025 vs. 2024)

# FACTORS TO DRIVE INTEREST IN INDIGENOUS CULTURAL EXPERIENCES

Safety and comfort, along with nature-based settings, are the top drivers of interest in Indigenous cultural experiences, though overall interest across factors has declined year over year.



Victoria  
British Columbia

\*\*New statement added in 2025  
 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=771)  
 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

FARINE  
FIVE ROSES



Montreal  
Quebec



# TOP 10 TRIP ANCHORS ACTIVITIES

**32%**

Oceanside Beaches

**25%**

Fine Dining

**22%**

Trying Local Food and Drink

**21%**

Natural Attractions

**20%**

Nature Walks

**19%**

Historical, Archaeological, or World Heritage Sites

**19%**

Nature Parks

**16%**

Local Markets

**15%**

Art Galleries or Museums

**14%**

Lakeside Beaches

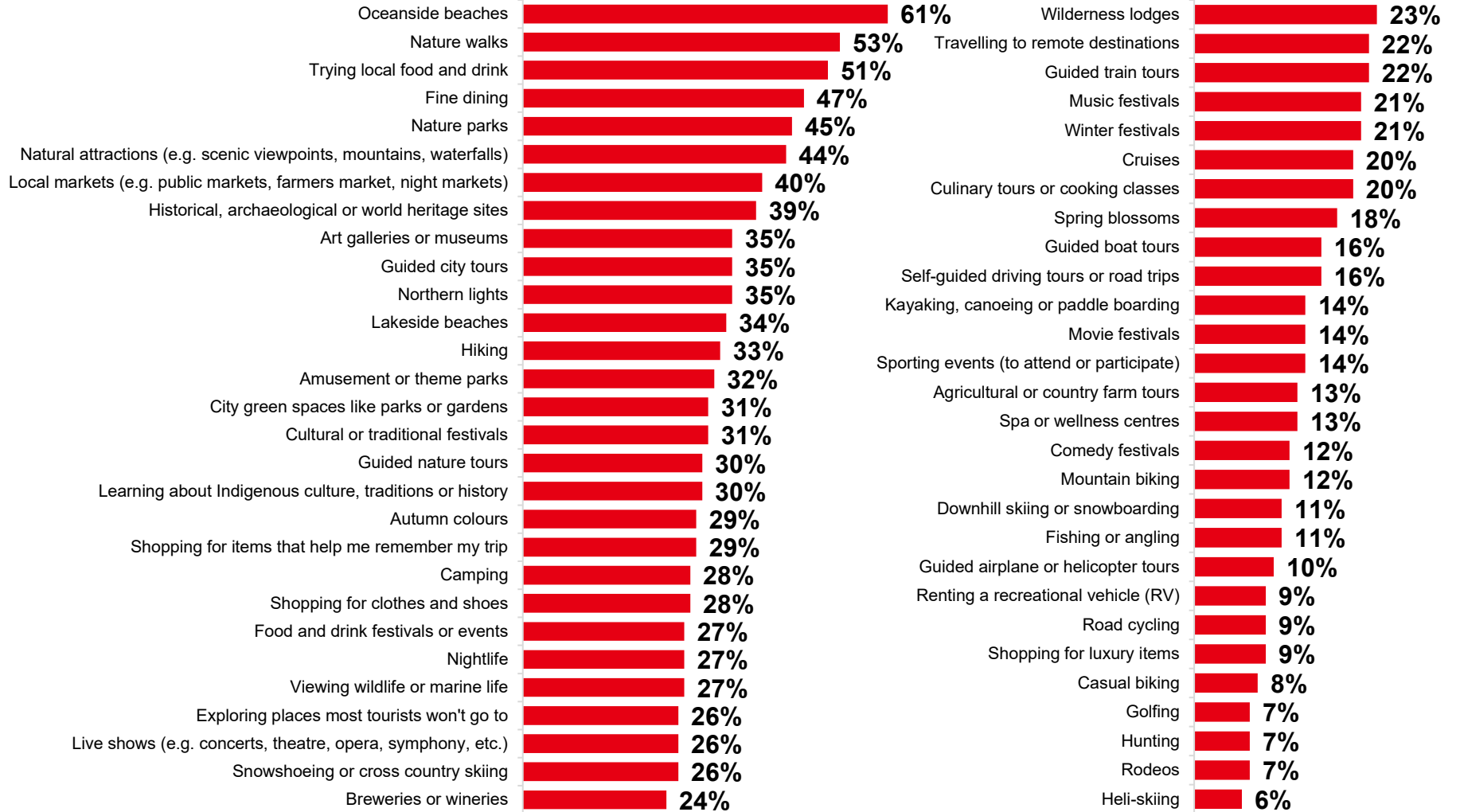


**Mexican travellers are most likely to base an entire holiday around oceanside beaches and fine dining.**



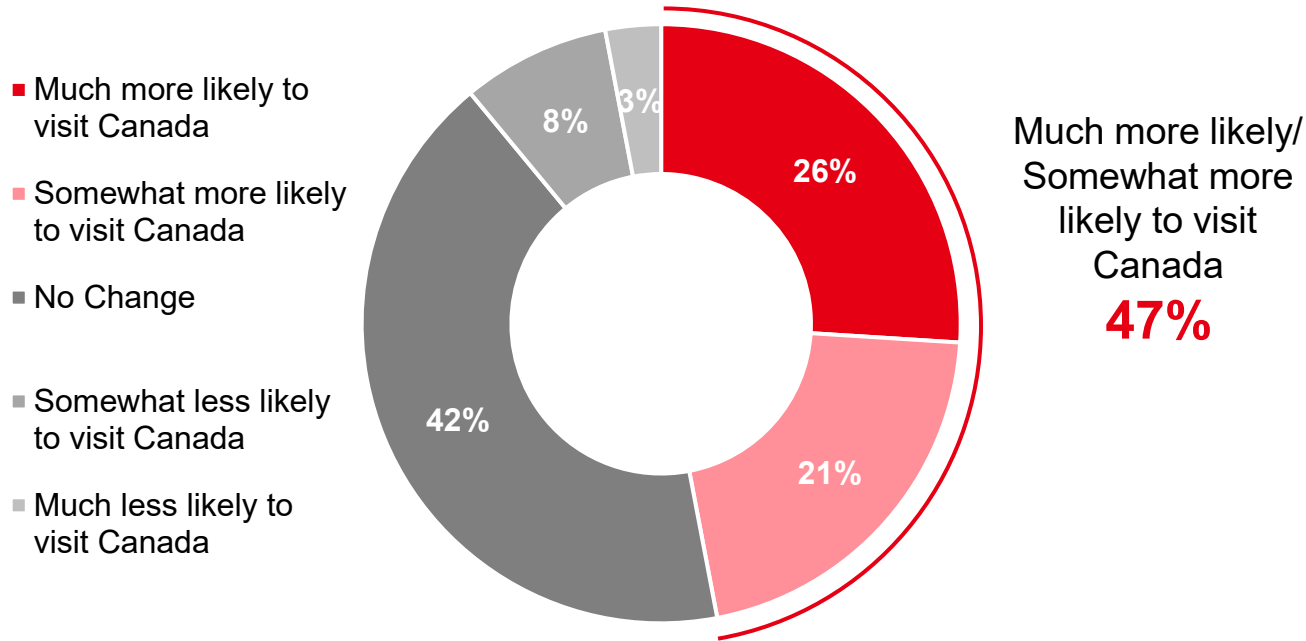
# GENERAL ACTIVITIES INTERESTED IN (FULL LIST)

Top activities when on a holiday include oceanside beaches, nature walks, and trying local cuisine.



Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1507)  
 D4. In general, what activities or places are you interested in while on holiday? (Select all that apply)

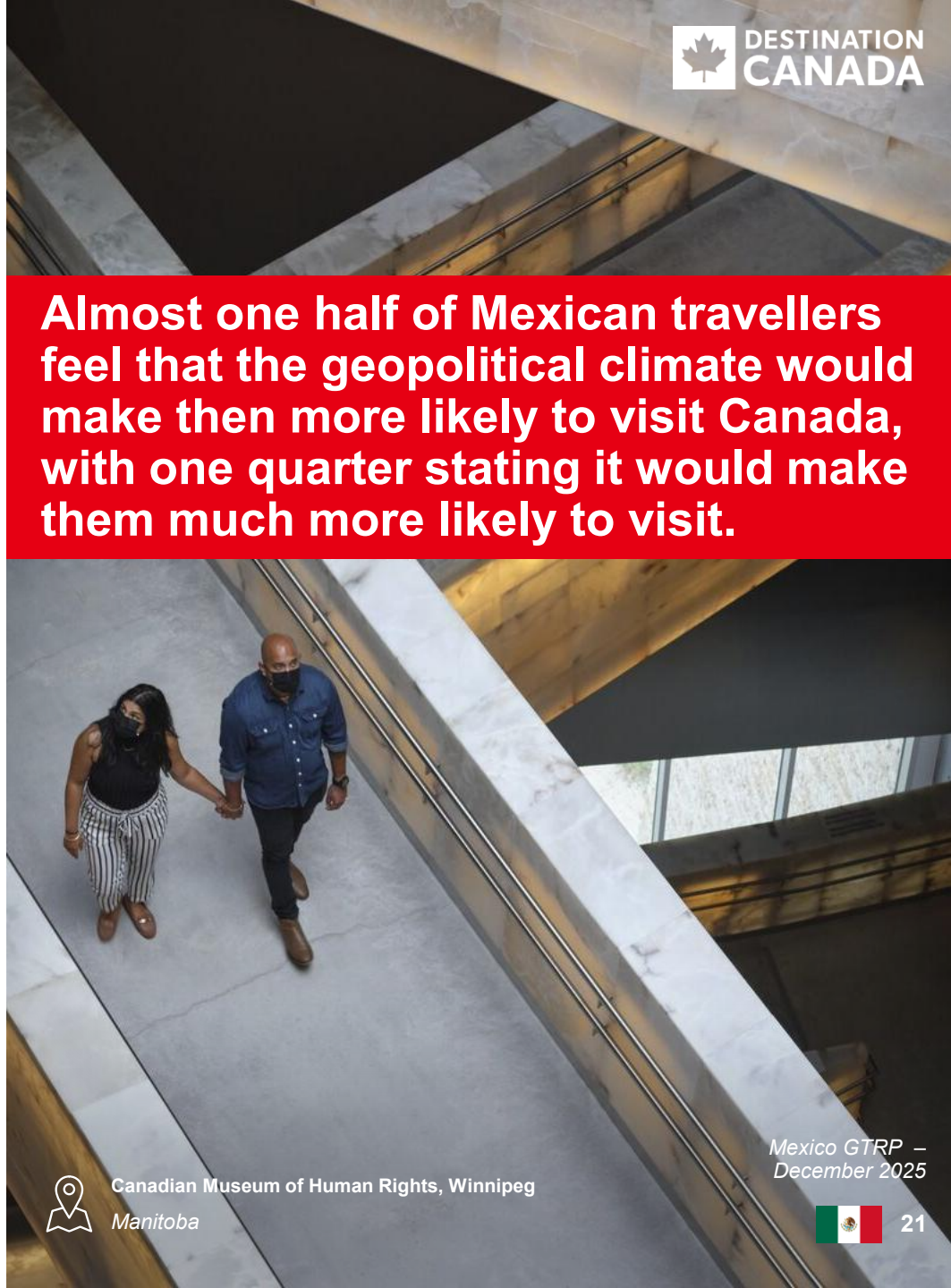
# STATED IMPACT OF GEOPOLITICAL CLIMATE ON VISITING CANADA



## Geopolitical Climate Description

Geopolitical climate can include factors such as politics, international relations, trade disputes, or global conflicts.

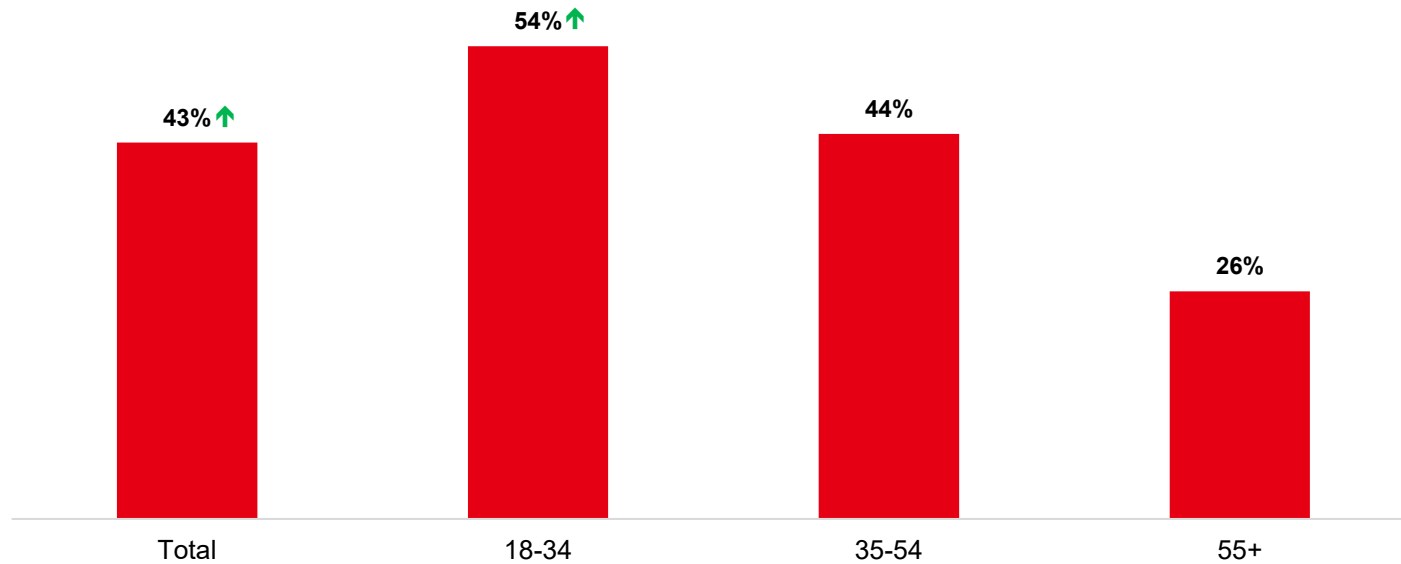
Note: respondents were asked either about decision for which airline to fly with (D18) or stated impact of geopolitical climate on visiting Canada (E16)  
 Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=764)  
 E16. How does the current geopolitical climate affect your likelihood of visiting Canada?



**Almost one half of Mexican travellers feel that the geopolitical climate would make them more likely to visit Canada, with one quarter stating it would make them much more likely to visit.**



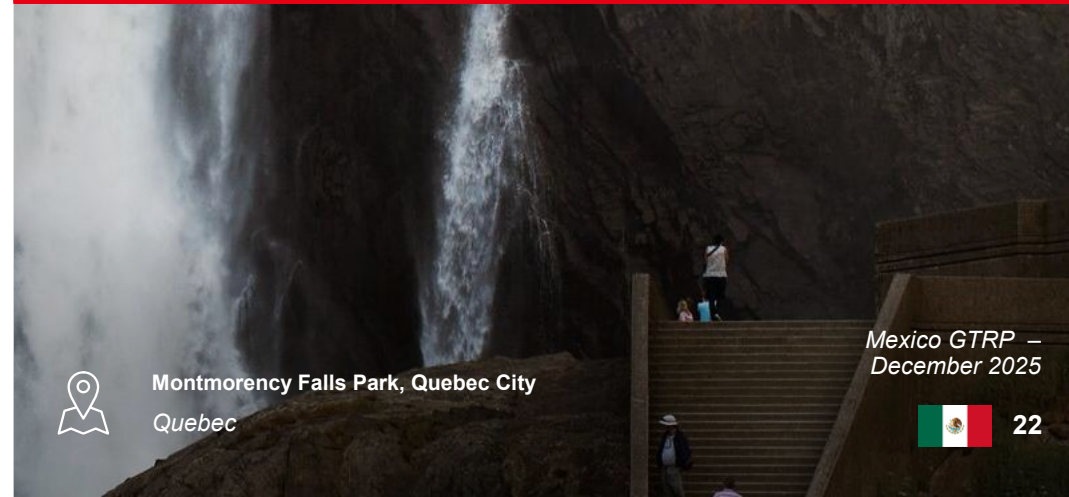
# USAGE OF AI TOOLS TO PLAN TRIPS: BY AGE



AI usage in travel planning has increased year over year, with over four in ten Mexican travellers using it, rising to over half among 18-34 year olds.

↑ / ↓ = significantly higher/lower result (2025 vs. 2024)

Note: Question wording was updated in 2025 to include "booking a trip"  
 Base: Long-haul pleasure travellers (past 3 years or next 2 years) 2025 (n=1507); 2025 18-34 (n=552); 2025 35-54 (n=661); 2025 55+ (n=294)  
 D14. Have you ever used an AI tool (e.g. ChatGPT or Bard) to research, plan or book a trip?



Montmorency Falls Park, Quebec City  
Quebec

Mexico GTRP –  
December 2025



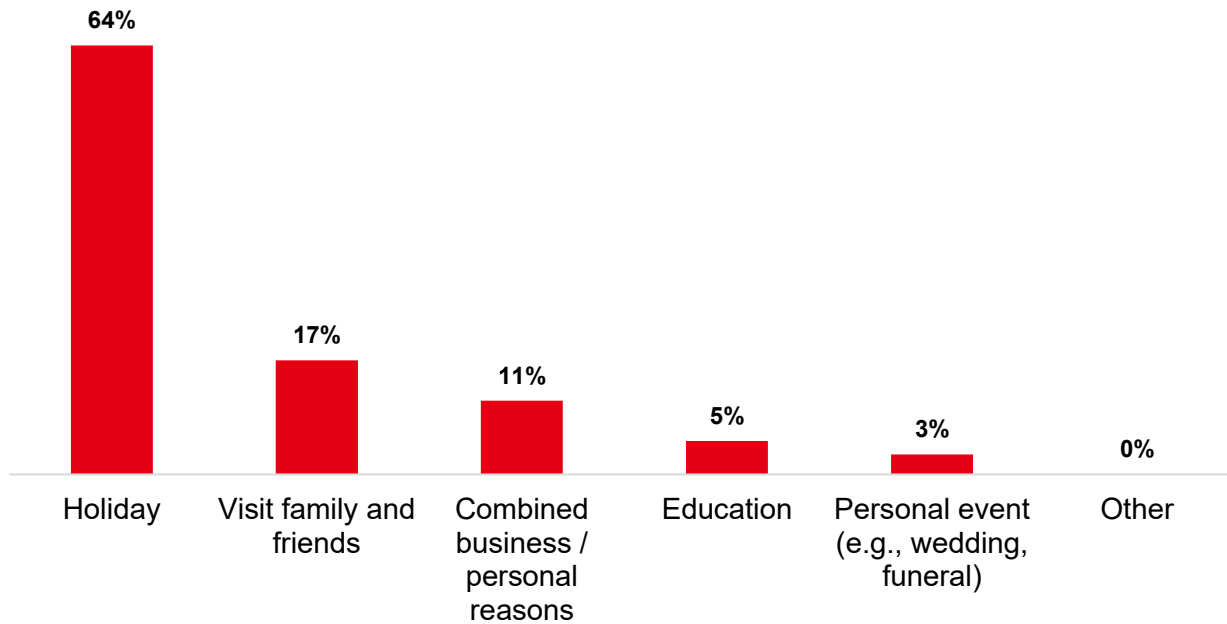
# MOST RECENT TRIP TO CANADA



Le Pays de la Sagouine  
New Brunswick



# MAIN PURPOSE OF RECENT TRIP



↑ / ↓ = significantly higher/lower result (2025 vs. 2024)

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination past 3 years (n=361)  
 F2. What was the main purpose of this trip? (Select one)



**Holidays continue to be the dominant purpose for Mexican travellers to Canada in the past three years.**

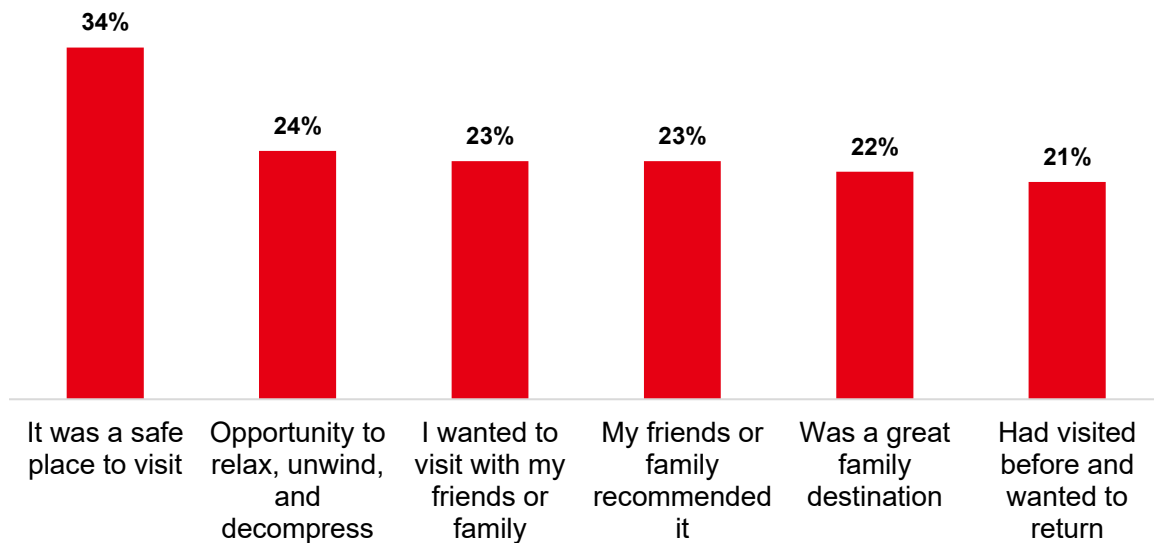


Nahanni National Park Reserves  
 Northwest Territories

Mexico GTRP –  
 December 2025



# FACTORS IN CHOOSING DESTINATION FOR RECENT TRIP (TOP 6)



↑ / ↓ = significantly higher/lower result (2025 vs. 2024)

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination past 3 years, Took a holiday (n=229)  
F3. Which of the following factored into your choice of destination for this trip? (Select all that apply)

Mexican travellers tend to choose Canada because it's a safe place to visit.

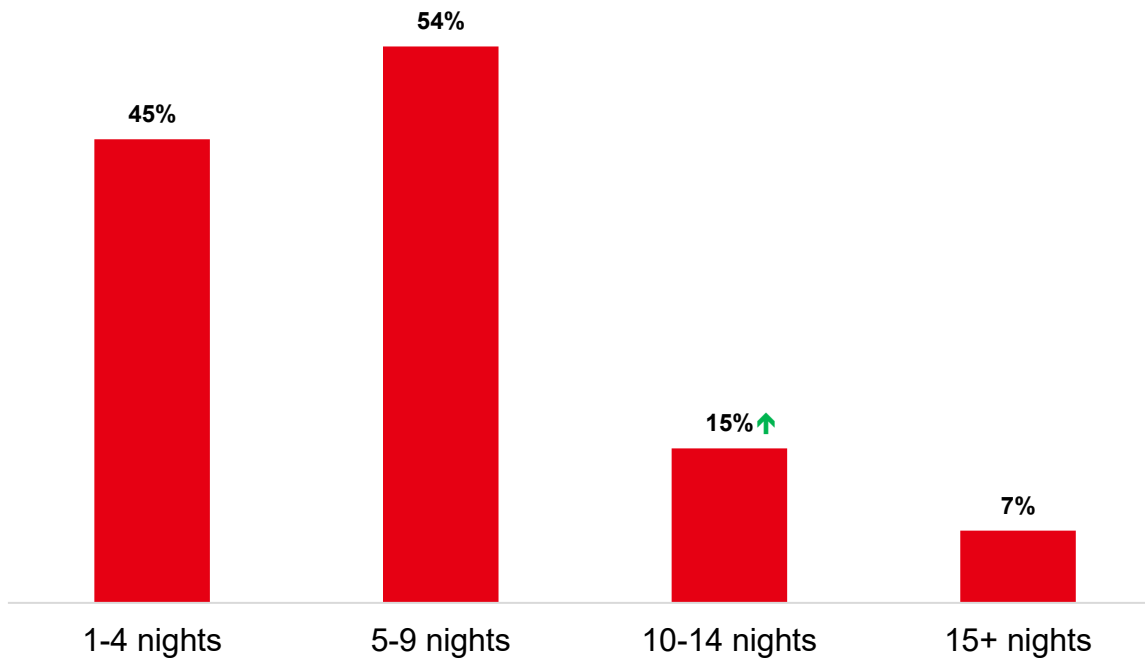


Fundy Trail Provincial Park  
New Brunswick

Mexico GTRP –  
December 2025



# NIGHTS SPENT DURING RECENT TRIP



**Trips to Canada of 10-14 nights have increased, with staying up to nine nights still being the most common.**

↑ / ↓ = significantly higher/lower result (2025 vs. 2024)

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination past 3 years (n=361)  
F4. How many nights did you spend in this destination?



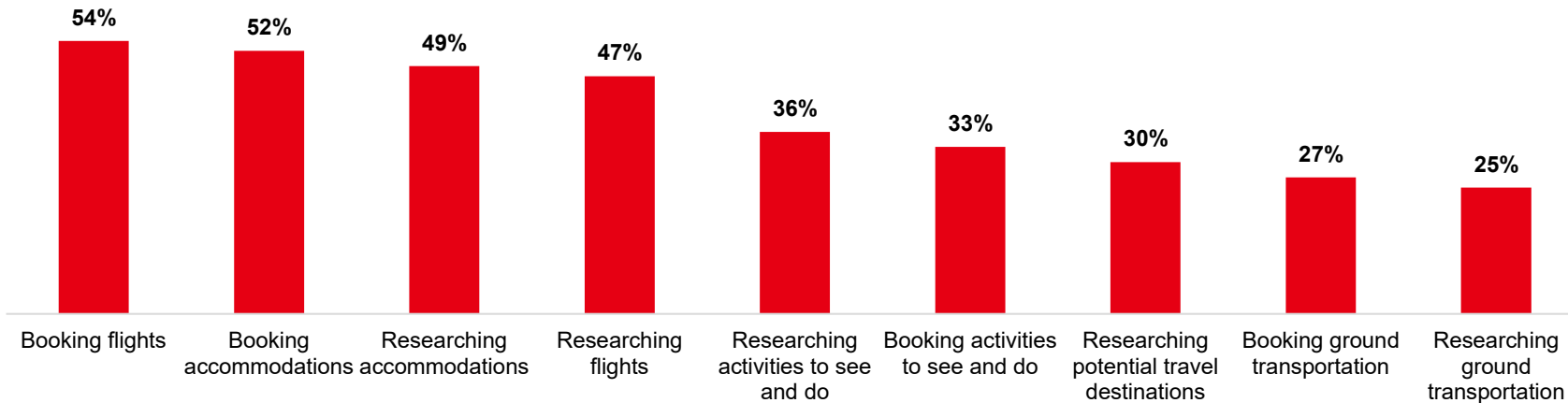
Barren Canyon, Algonquin Park  
Ontario

Mexico GTRP –  
December 2025



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

**52%** used a travel agent



↑ / ↓ = significantly higher/lower result (2025 vs. 2024)

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination past 3 years (n=189)

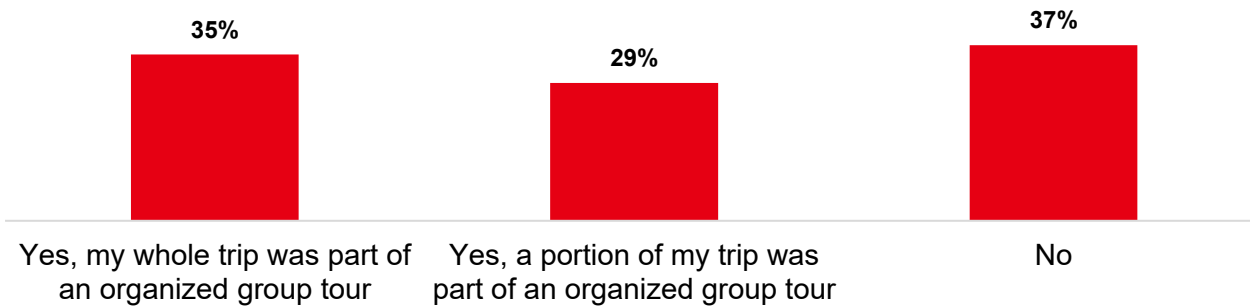
F9. Travel agents offer personalized service to help individuals, groups, and business travellers plan and organize their travel schedules, from purchasing tour packages to booking flights and hotels. Examples of travel agents include Mundo Joven or Viajes El Corte Inglés, they do not include AI Travel Assistants or 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)

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination past 3 years, Used a Travel Agent/Tour Operator

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

**Over one half of Mexican travellers to Canada used a travel agent, most likely for booking flights and accommodations.**

# ORGANIZED GROUP TOUR FOR RECENT TRIP



**Two thirds of Mexican travellers to Canada in the past three years used an organized group tour for at least a portion of their trip, on par with 2024.**

↑ / ↓ = significantly higher/lower result (2025 vs. 2024)

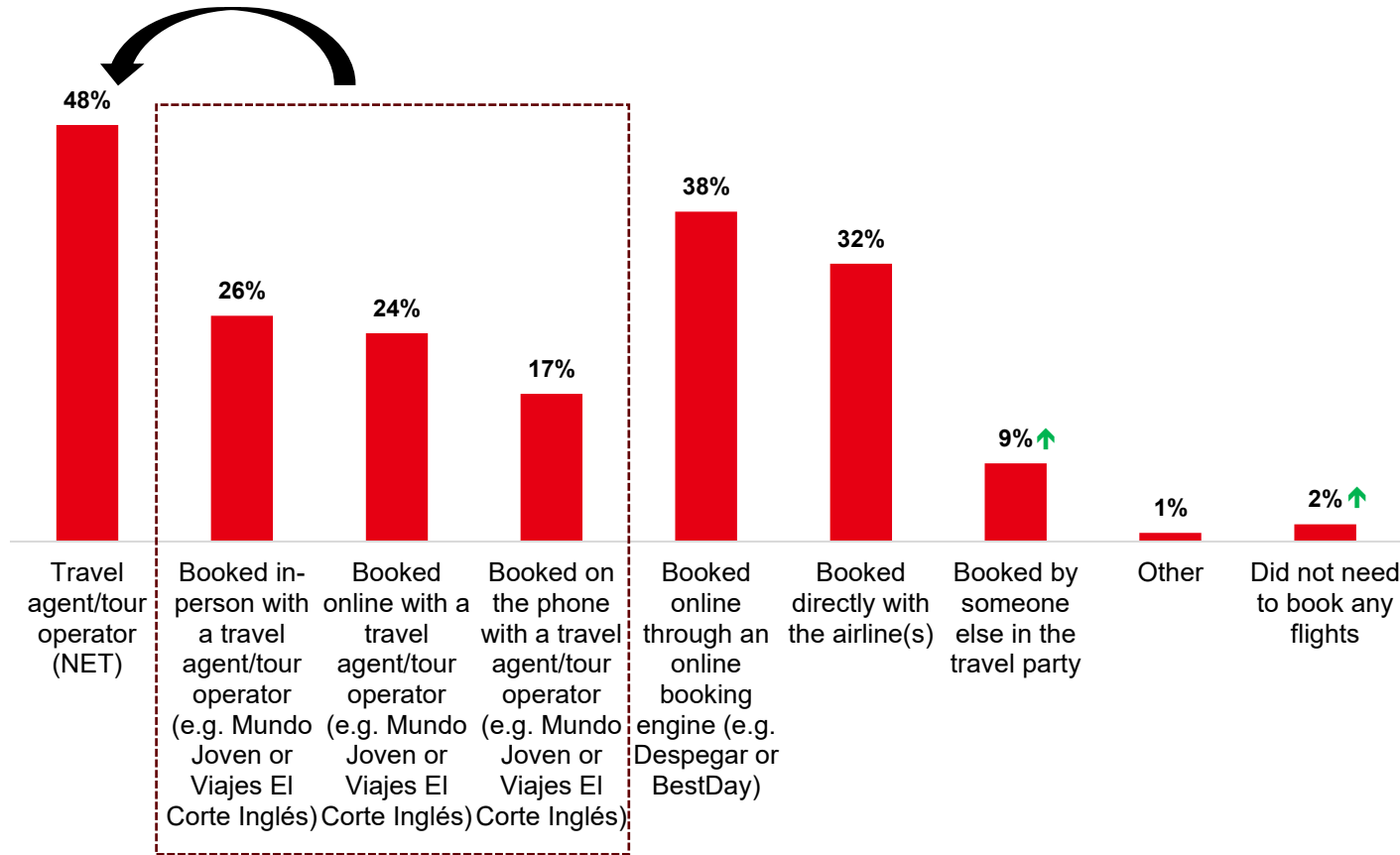
Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination past 3 years (n=361) F11. An organized group tour consists of a package where any combination of accommodation, transportation, food and/or activities are included as a multi-day itinerary. Did you travel as a part of an organized group tour on this trip?



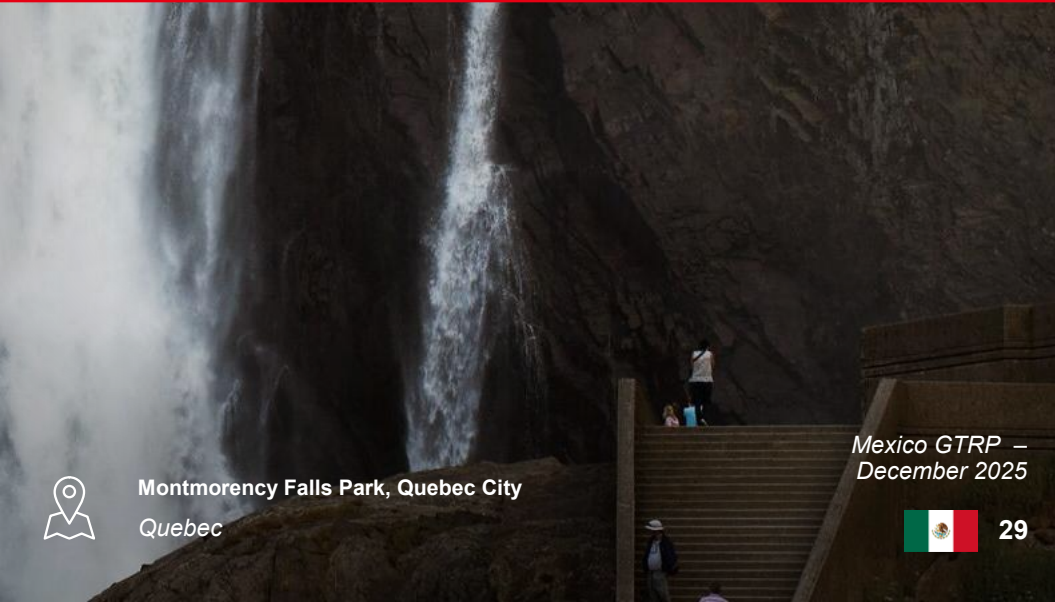
Saskatoon  
Saskatchewan

Mexico GTRP –  
December 2025

# BOOKING FLIGHTS FOR RECENT TRIP



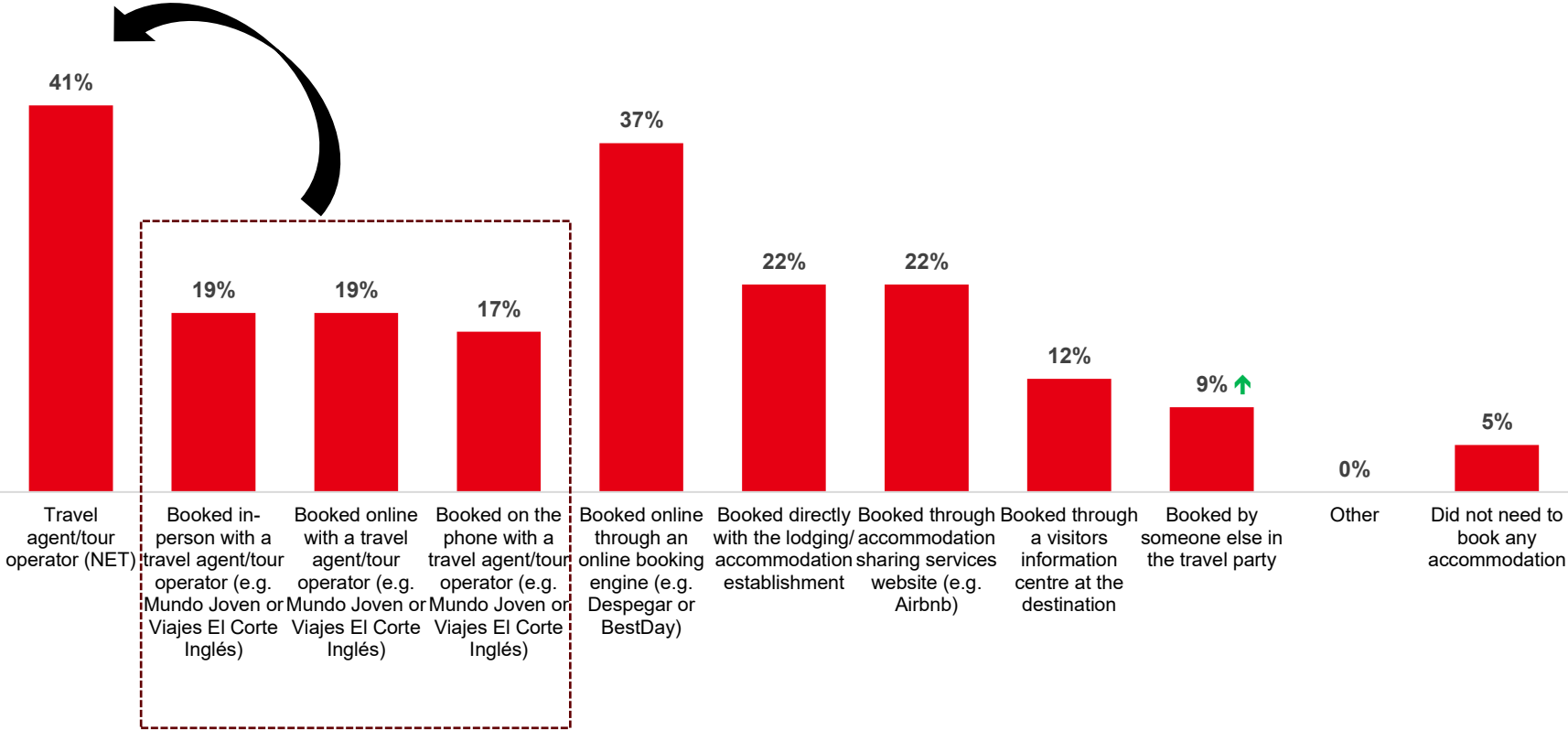
**Recent Mexican travellers to Canada were most likely to have booked flights through a travel agent or tour operator, followed by through an online booking engine.**



↑ / ↓ = significantly higher/lower result (2025 vs. 2024)  
 Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination past 3 years (n=361)  
 F12. How did you book your flight for this trip? (Select all that apply)



# BOOKING ACCOMMODATIONS FOR RECENT TRIP

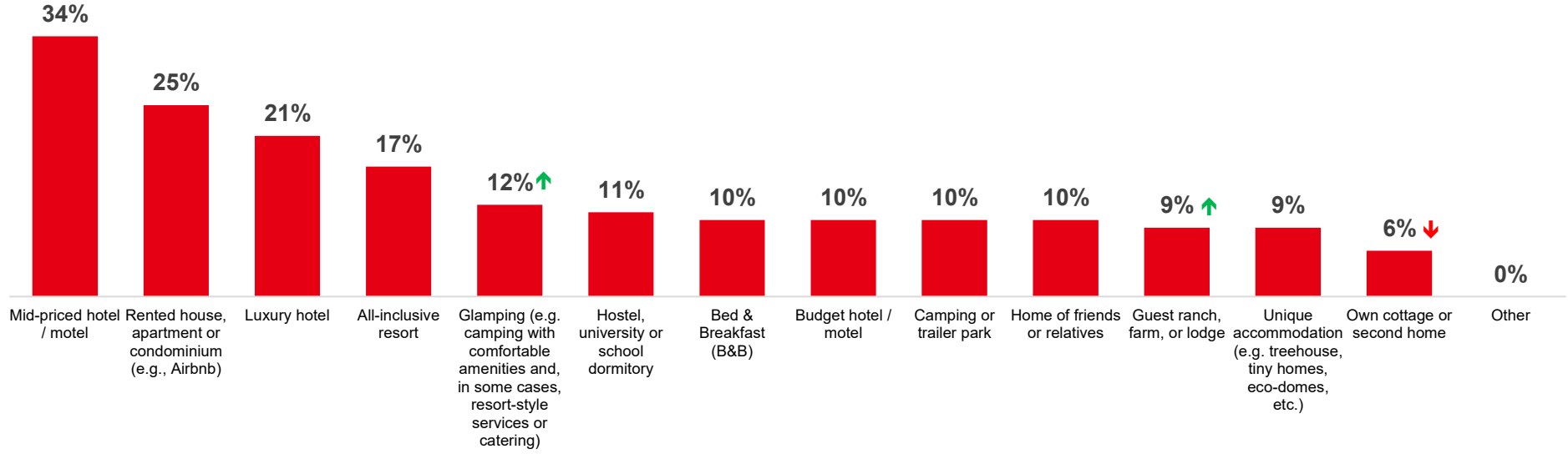


Similar to flights, most Mexican travellers used a travel agent or tour operator to book their accommodations, followed by an online booking engine.

↑ / ↓ = significantly higher/lower result (2025 vs. 2024)

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination past 3 years (n=361)  
 F13. How did you book your accommodation for this trip? (Select all that apply)

# TYPE OF ACCOMMODATIONS FOR RECENT TRIP

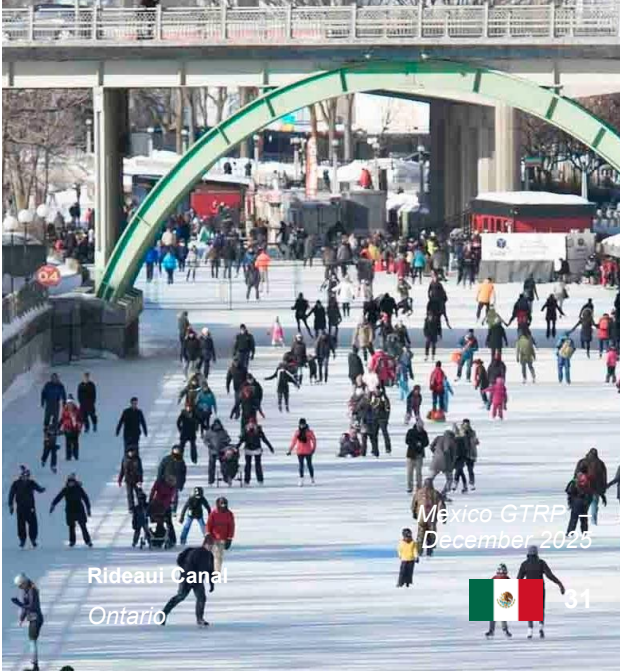


↑ / ↓ = significantly higher/lower result (2025 vs. 2024)

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination past 3 years, Booked Accommodations (n=346)  
 F14. Which type of accommodation did you stay in during this trip? (Select all that apply)



**Mexican travellers that recently travelled to Canada were most likely to stay in a mid-priced hotel or motel.**



Mexico GTRF  
 December 2026

Rideau Canal  
 Ontario



# THANK YOU

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

