### 2021 Global Tourism Watch Highlights Report

**Global Tourism Watch** 



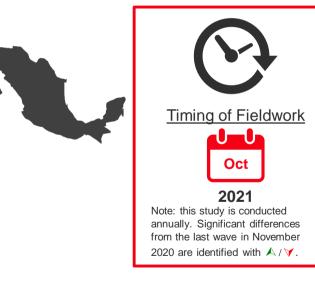
### Mexico





### **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 accommodation in the past 3 years, or plan to take such a trip in the next 2 years.









### **Market Overview**

It is important to consider the results in light of the COVID-19 situation at the time of data collection (October 2021).

#### **COVID-19 situation in Mexico**

In October 2021, Mexico was using a four-tiered "COVID-19 Traffic Light Monitoring System" that was updated bi-weekly to alert residents of local COVID-19 transmission and to provide guidance on restrictions in each of the country's states and municipalities.<sup>1</sup> In mid-October, Baja California was the only state classified as "orange" with the most restrictions imposed, including mandatory masks in public places and capacity limits of up to 50%. The remaining states were either classified as "yellow" (mandatory masking and capacity limits of up 75%) or "green" (no restrictions).<sup>2</sup>

#### **Outbound travel situation**

Many top competitors were open to fully vaccinated travellers, but required PCR tests on arrival (e.g. Italy)<sup>3</sup>, while others (e.g. US) were closed to visitors.<sup>4</sup> Mexico's vaccination rate was relatively low at 62%.<sup>5</sup> Mexico has had some of the most lenient entry guidelines since the beginning of the pandemic. Travellers arriving in Mexico were asked to complete a health declaration form prior to arrival but were not required to quarantine or provide proof of vaccination or a negative test.<sup>6</sup>

Canada's borders re-opened to non-resident visitors who were fully vaccinated with a Health Canada approved vaccine on September 7, 2021. All visitors still required a pre-entry COVID-19 molecular test, but quarantine requirements were eliminated for vaccinated travellers.<sup>7</sup>

<sup>1</sup> Ogletree Deakins, October 2021.
 <sup>2</sup> Crisis24, October 2021.
 <sup>3</sup> Schengenvisa News, December 2021.
 <sup>4</sup> Department of Homeland Security, October 2021.

- <sup>5</sup> Wilson Centre, November 2021. 2021.
- <sup>6</sup> Forbes, October

#### **Travel Indicators**

Mexico is a mature market with fairly high levels of longhaul travel and strong future travel intention, including to Canada.









### **KEY HIGHLIGHTS**

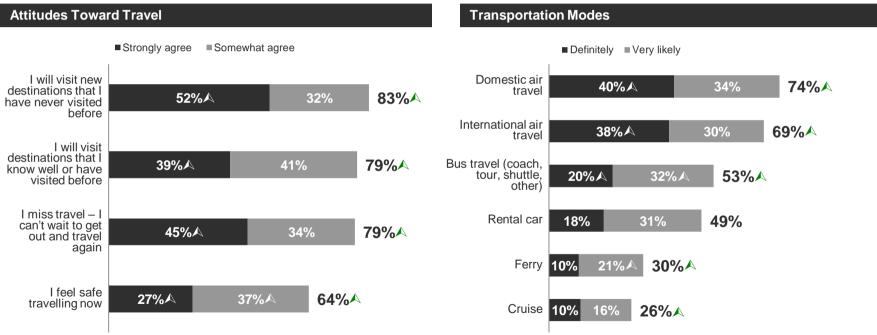
Insight	Implication
<b>Mexican travellers are ready to travel again.</b> Significantly more Mexican travellers say they feel safe travelling now, and the likelihood to use most forms of transportation has increased. Canada ranks 2 <sup>nd</sup> only to the US on unaided consideration.	There is an opportunity to capitalize on Mexican travellers' renewed interest in travel. Finding ways to differentiate Canada from other countries competing for the Mexican market, particularly the US, is important.
Concerns around health and safety measures at a destination remain the top consideration in selecting travel destinations, while vaccine passports and quarantine requirements are secondary. COVID-19 concerns related to medical care, caseloads, and travel insurance have subsided compared to the 2020.	To attract potential visitors and differentiate Canada from competitors, it is important to communicate Canada's entry requirements for fully vaccinated travellers as well as the lack of quarantine requirements.
Travel is the top spending priority for the next year, with Mexican travellers planning to spend more on travel post-COVID-19 than they did pre-COVID-19. Travel to long-haul destinations (outside Mexico and Central America) is projected to see the greatest percentage growth in spending.	The current prioritization of spending on travel, along with the high anticipated spend on long-haul travel post-COVID-19, presents a strong opportunity for Canada.
Mexican travellers remain interested in a variety of activities, both nature-based and city-based. Interest in seeing the Northern lights is of greatest interest, both generally and on a trip to Canada, and is the top activity Mexican travellers would base a trip around.	Viewing the Northern lights on a trip to Canada could be a strong lure for Mexican travellers and presents an opportunity to differentiate Canada from the US.
Mexican travellers rank health risks and cost above all other barriers to visiting Canada. While tied with cost as the top barrier, concerns about health risks have declined in importance since 2020, particularly among 18-34 year olds.	Mexican travellers are cost conscious and Canada must find ways to convince prospective visitors that a Canadian vacation offers good value for money. Communicating the health and safety measures in place in Canada may also help to encourage visitation.
November and December are almost as popular as the peak summer months for Mexican travellers considering a visit to Canada. Mexican travellers are strongly interested in participating in winter related activities on a future trip to Canada, with the Northern lights and snowshoeing/cross country skiing being most popular. Historical visitation during November and December is lower than demand, which suggests there is potential to disperse Mexican visitation into these months.	There is an opportunity to disperse Mexican visitation into November and December by promoting winter-related activities that Mexican travellers are interested in and Canada is well positioned to deliver on.
Travel agents and tour operators play a substantial role in supporting travel from the Mexico to Canada. The majority of potential Mexican visitors indicate that they are likely to use a travel agent to research or book a trip to Canada.	Building and maintaining relationships with the Mexican travel trade is important to boosting visitation to Canada.
4	CÅ

# COVID-19 Considerations



### **Attitudes Toward Travel and Transportation Modes**

- Significantly more Mexican travellers say they feel safe travelling now (64%, up from 32% in 2020). Comfort levels have increased equally across all age groups, and Mexican travellers are more enthused about travel generally, with a slight preference for visiting new destinations over familiar ones.
- As COVID-19 restrictions ease, Mexican travellers are also growing more comfortable with using most forms of transportation, including flying internationally (69%, up from 58% in 2020).



▲ /V Significantly higher/lower than 2020 GTW wave.

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1500) COV13. Thinking of your next holiday, as government restrictions allow, how much do you agree

COV13. Thinking of your next holiday, as government restrictions allow, how much do you agree or disagree with the following statements? ▲ / ✓ Significantly higher/lower than 2020 GTW wave.

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1500) COV16. As government restrictions allow, how likely are you to use the following modes of transportation?



### **Most Important Considerations in Selecting Travel Destination**

- Health and safety measures at a destination remain the top concern for Mexican travellers when selecting a destination, especially among those 55+ years. Concerns related to medical care, COVID-19 caseloads, travel insurance, and other related COVID-19 concerns are generally subsiding.
- Proof of vaccination/vaccine passports and guarantine requirements at a destination remain high on Mexican travellers' list of considerations when selecting a travel destination, particularly for those 55+ years. In October 2021, there were no guarantine requirements for vaccinated travellers to enter Canada or upon return to Mexico.

Health and safety measures in a country	50%
+Requirement of vaccine passport or proof of vaccination upon entry into a country	36%
Quarantine requirements upon entry into a country	26%
Availability of proper medical attention in a country	24%
Availability of insurance to cover medical costs	22%∀
+Proportion of the population that has been vaccinated in a country	21%
The number of COVID-19 cases increasing in a country	17%
The number of COVID-19 cases being higher in a country, compared to my own country	16%
Availability of insurance to cover trip interruption or change costs	13%
The possibility of being stranded in a country if transportation options become unavailable	12%
Quarantine requirements upon re-entry into my own country	12%
The possibility of infecting others upon my arrival or return	10%
Other	l <1%
None of the above	4%

▲ /▼ Significantly higher/lower than 2020 GTW wave.

+ New statement in 2021 GTW - no trending.

Base: Long-haul pleasure travelers (past 3 years or next 2 years) (n=1500) NEWQ3. When thinking about taking a holiday trip outside of your country, which of the following are the most important considerations in selecting your travel destination? (Select up to 3 options)



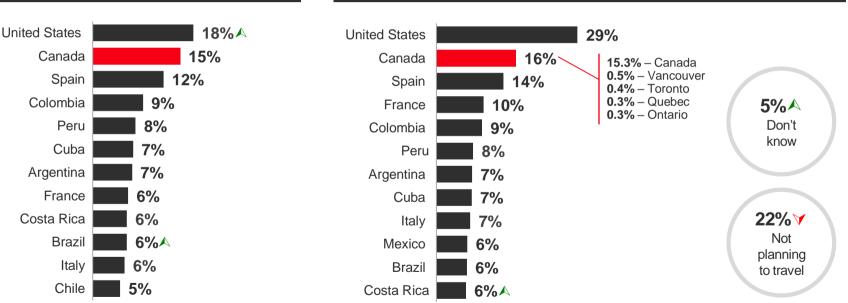
# Key Performance Indicators



### **Unaided Long-Haul Destination Consideration (Next 2 Years)**

Unaided consideration represents the top-of-mind presence of destinations in the consumer mindset and requires travellers to think of destinations without being prompted.

Canada is ranked as the #2 top-of-mind country that Mexican travellers are considering visiting in the next 2 years, behind only the United States.



**Top 12 Destination Countries**<sup>2</sup>

▲ / ¥ Significantly higher/lower than 2020 GTW wave.

Top 12 Destination Brands<sup>1</sup>

<sup>1</sup> Responses as mentioned by respondents (e.g., percentage who said "Canada" specifically). <sup>2</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=1500)

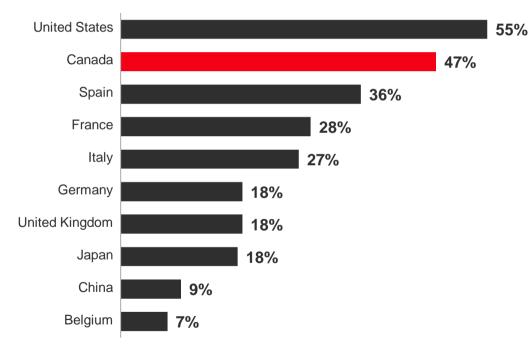
S8. You mentioned that you are likely to take a long-haul holiday trip outside of Mexico and Central America in the next 2 years. Which destinations are you seriously considering? (Please list up to 3 destinations)



### **Aided Destination Consideration (Next 2 Years)**

<u>Aided consideration</u> represents the proportion of travellers who say they would seriously consider visiting a destination, when prompted with a list of potential destinations. For these travellers, Canada may not be top-of-mind as a destination, but they are considering a visit in the next 2 years.

► Canada also ranks 2nd on aided consideration – behind the United States, but well ahead of Spain.



▲ /▼ Significantly higher/lower than 2020 GTW wave.

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1500)

BVC1. You may have already mentioned this before, but which destinations would you seriously consider visiting in the next 2 years? (Select all that apply)



### **Knowledge of Holiday Opportunities**

Canada also ranks #2 on destination knowledge among long-haul competitors, marginally behind the United States.

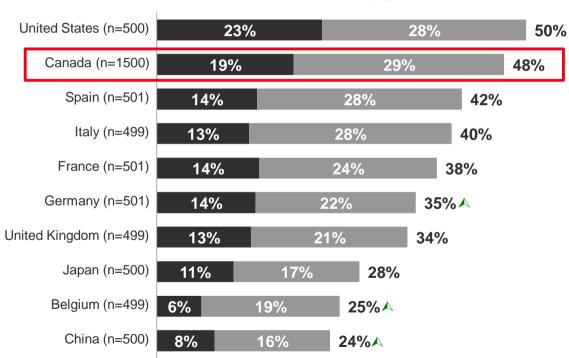




Image: Non-State And Amage: A state of the state of th

Base: Long-haul pleasure travellers (past 3 years or next 2 years) evaluating each destination MP3. How would you rate your level of knowledge of holiday opportunities in each of the following destinations?

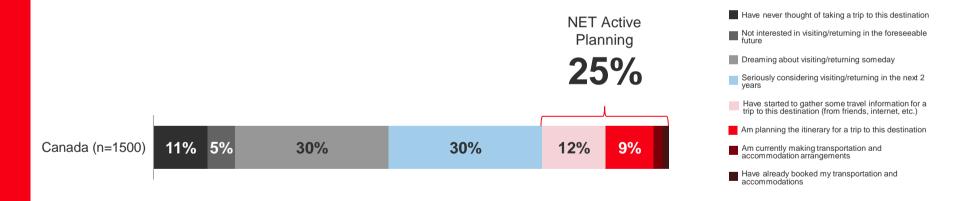
11



### Stage in the Purchase Cycle by Market

There is a purchasing or decision-making cycle associated with long-haul travel; consumers move through progressive stages from not knowing anything about a destination to booking a trip. <u>NET Active Planning</u> represents the final four stages, or lower funnel, of this path-to-purchase cycle.

Between 10% and 32% of Mexican travellers are in the lower funnel stages of the purchase cycle for Canada's top competitor long-haul destinations. Canada is ranked 2<sup>nd</sup> overall, behind the US (which recorded a significant increase in 2021), with 25% of Mexican travellers in the NET active planning stages for a trip to Canada. This suggests that Canada is well positioned to convert interested travellers into visitors providing it can differentiate itself from the US.



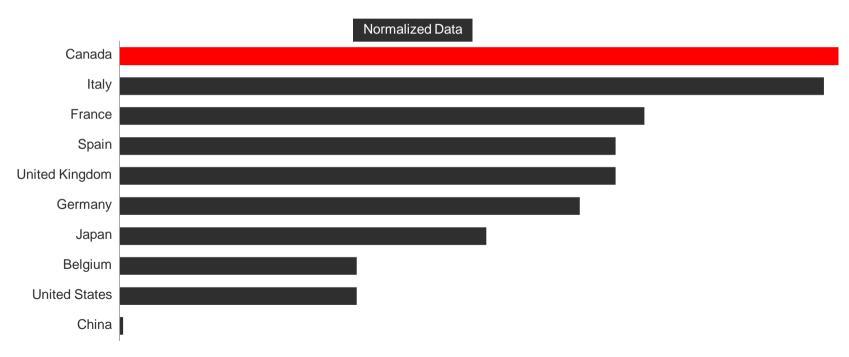
Base: Long-haul pleasure travellers (past 3 years or next 2 years) – note all respondents evaluated Canada plus 2 randomly selected countries from the competitive set MP1. Which of the following best describes your current situation when thinking about each of the following destinations for a holiday trip?



### **NET Promoter Score (NPS)**

The Net Promoter Score (NPS) measures the likelihood of travellers to recommend a destination. It is an important measure for advocacy, since a high NPS score suggests that those who have visited Canada are more likely to encourage others to visit. Results are gathered among travellers who have ever visited each destination and data has been normalized to indicate relative NPS scores across all competitors.

Canada continues to be ranked 1<sup>st</sup> overall, with a slight lead over Italy, but far ahead of the United States.



Base: Long-haul pleasure travellers (past 3 years or next 2 years) who have visited each destination MP11. Whether you have visited or not, how likely are you to recommend each of the following holiday destinations to a friend, family member or colleague?

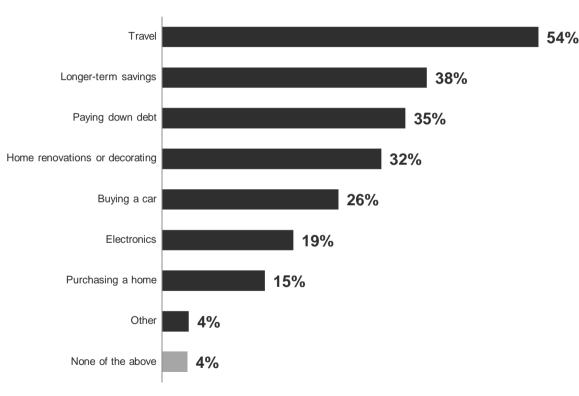


## Travel Spending and Canada Travel Intent



### **Spending Priorities for the Next Year+**

> Travel is the top immediate spending priority for Mexican travellers in 2021, far ahead of other priorities such as savings and paying down debt.





### **Travel Spending Intentions (in Next 12 Months)**

Travel Market Outlook is the difference between the proportion who say they will spend more on travel in the next 12 months than they did in the last 12 months, minus the proportion who say will spend less on travel in the next 12 months.

- Mexican travellers foresee spending more on all types of travel in the next year than they did in the past year. The outlook for leisure travel within Mexico is most improved (-9 in 2020 vs +13 in 2021).
- ▶ While the long-haul travel outlook is still negative, it is significantly improved from 2020 (-23); however, it is still well behind the pre-pandemic outlook in 2019 (+7).



Significantly higher/lower than 2020 GTW wave.

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1500) S2. How would you describe your spending intentions on the following items in the next 12 months compared to the last 12 months? Will you spend ...?



### Travel Spending<sup>+</sup>

- Mexican travellers anticipate spending more on travel post-COVID-19 than they did pre-COVID-19, with the greatest percentage growth in spending projected for travel to long-haul destinations (outside Mexico and Central America).
- Anticipated spending on long-haul travel (\$3,351) is 1.6 times the anticipated spending on short-haul travel within Mexico and Central America (\$1,994).

#### PRE-COVID POST-COVID NET CHANGE POST-COVID MINUS **Travelling within Mexico** PRE-COVID \$1438 \$1460 +\$22 (+2%) Travelling within Mexico and Central America \$1795 \$1994 +\$199 (+11%) Travelling outside Mexico and Central America \$2810 \$3351 +\$541(+19%)

+ New questions in 2021 GTW – no trending.

Base: Long-haul pleasure travellers who travelled in 2019 (n=384 Domestic / n=147 Short-haul / n=202 Long-haul) TP2\_INT. Thinking about the holiday trips you took in 2019, approximately how much did your immediate household spend in total on trips to each destination? A rough estimate is fine but if you cannot remember please select don't know. (PRE-COVID)

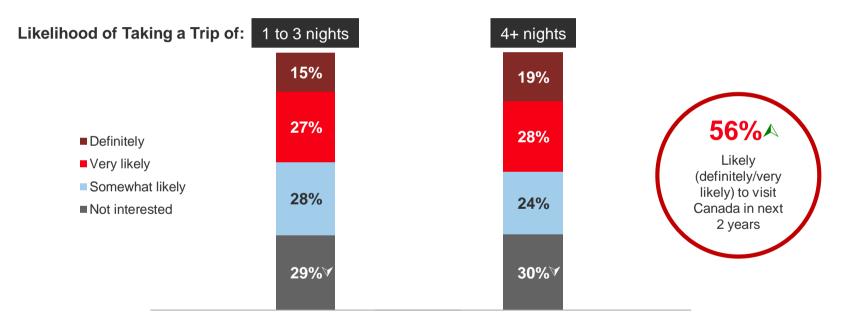
Mean Annual Household Spend on Vacation Trips

Base: Long-haul pleasure travellers who expect to travel post-COVID-19 (n=416 Domestic / n=188 Short-haul / n=282 Long-haul) TP2B\_INT. Thinking about the vacation trips you plan to take when COVID-19 is no longer a consideration, approximately how much does your immediate household intend to spend in total on trips to each destination? A rough estimate is fine but if it's too hard to predict please select don't know. (POST-COVID)



### Likelihood of Visiting Canada in Next 2 Years

- Among all Mexican travellers, the likelihood of visiting Canada in the next two years is up significantly from 2020.
- ▶ Intent to visit Canada in the next two years is highest among those aged 18-54 and lowest among those aged 55+.
- ▶ The likelihood of Mexican travellers considering a trip to Canada of 4+ nights is similar to a shorter trip of 1-3 nights.



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=1500)

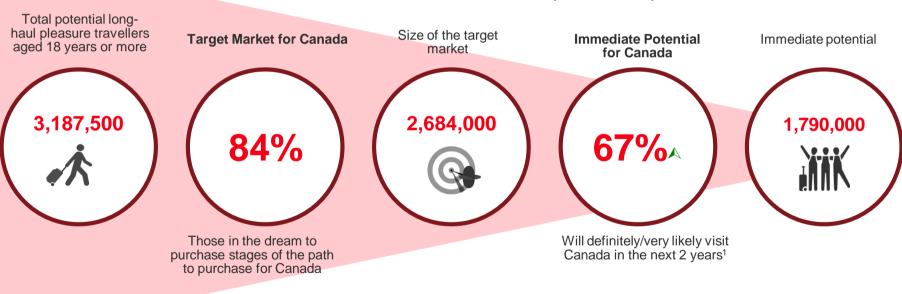
MP6. Realistically, how likely are you to take a holiday trip to Canada in the next 2 years?



### **Potential Market Size For Canada**

Study data is used to estimate the size of the potential market for Canada in two ways - the target market (proportion of all Mexican travellers in the dream to purchase stages of the purchase cycle for Canada) and the immediate potential market (intention among the target market to visit in the next two years).

The proportion of Mexican travellers considering Canada is stable, but within that group, the intention to visit Canada in the next two years increased significantly in 2021, resulting in an immediate potential market size of 1.79 million.



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

▲ / ¥ Significantly higher/lower than 2020 GTW wave.

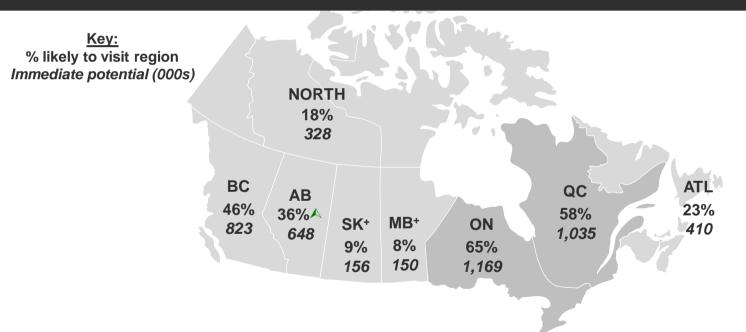
<sup>1</sup> Includes respondents likely to visit Canada for a trip of 1 to 3 nights, or a trip of 4 nights or more. Base: Target market for Canada = long-haul pleasure travellers (past 3 years or next 2 years) (n=1500); Immediate potential for Canada = dream to purchase stages for P2P for Canada (n=1294) MP1. Which of the following best describes your current situation when thinking about each of the following destinations for a holiday trip?

MP6. Realistically, how likely are you to take a holiday trip to Canada in the next 2 years?

### **Potential Market Size for the Regions**

▶ While interest in Alberta has increased significantly since 2020, Ontario and Quebec continue to garner the most interest from Mexican travellers.

#### Immediate Potential for Canada: 1,790,000



▲ / ¥ Significantly higher/lower than 2020 GTW wave.

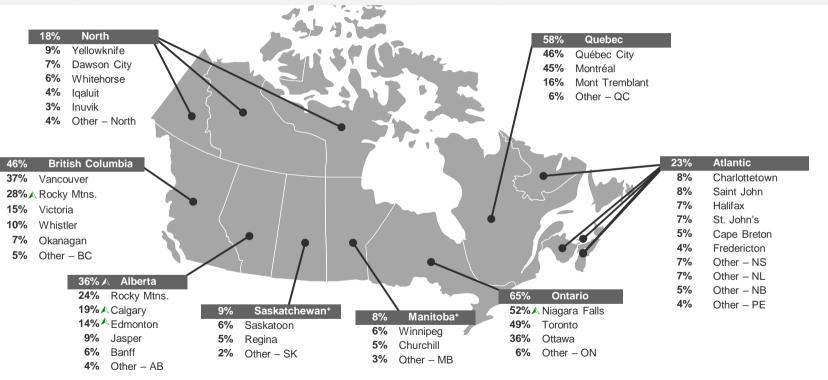
+ Saskatchewan and Manitoba were combined in 2020 GTW wave - no trending.

Base: Those in the dream to purchase stages of the part to purchase for Canada and definitely/very likely to take a trip to Canada (n=897) MP7. If you were to take a holiday trip to Canada in the next 2 years, which of the following Canadian travel destinations are you likely to visit? (Select all that apply)



### **Canadian Destinations Likely to Visit**

Although interest in visiting different Canadian regions overall is similar to 2020, interest in some Western Canadian destinations, including Calgary, Edmonton, and the BC Rocky Mountains, has increased in 2021. Niagara Falls regained its position as the top destination of interest in Ontario.



▲ /▼ Significantly higher/lower than 2020 GTW wave.

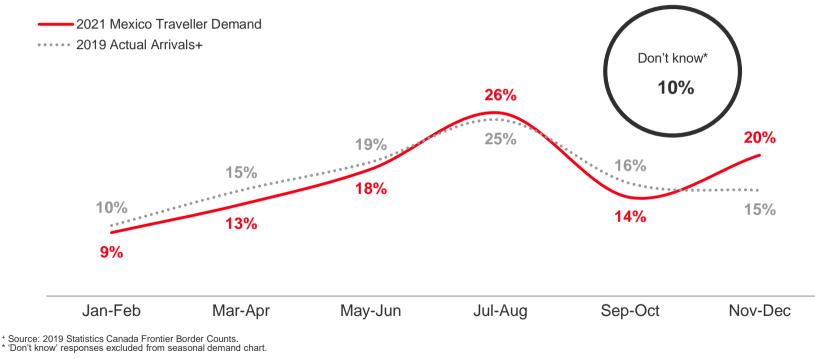
+ Saskatchewan and Manitoba were combined in 2020 GTW wave - no trending.

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=897) MP7. If you were to take a vacation trip to Canada in the next 2 years, which of the following Canadian travel destinations are you likely to visit? (Select all that apply)

21 MP7a-i. Within [province/region], which travel destinations are you likely to visit? (Select all that apply)

### **Mexico Seasonal Demand for Canada**

- July and August are the most popular months for Mexican travellers considering a visit to Canada, and also historically the peak months for visitor arrivals from Mexico.
- November and December are almost as popular as the peak summer months for Mexican travel demand. There is potential to disperse Mexican visitation into these months given that demand outpaces historical visitation.



▲ / ✓ Significantly higher/lower than 2020 GTW wave.

Base: Those in the dream to purchase stages of the path to purchase for Canada, excluding 'Don't know' (n=1188) PC3. What time of year would you consider taking a holiday trip to Canada in the next 2 years? (Select all that apply)

# Impressions of Canada



### **Impressions of Canada as a Holiday Destination**

Canada continues to be best known among Mexican travellers for beautiful scenery and landscapes, being a safe destination, and a great place to see wildlife. The proportion of Mexican travellers associating Canada with having great outdoor activities, city attractions, and dining and food experiences declined in 2021.

Offers good value for money	59%
Is a place I would be proud to tell people I have visited	59%
Its cities are great for exploring and soaking in the atmosphere	57%
Is a great place for touring around to multiple destinations	57%
Offers adventures that challenge me	57%
Its cities have a lot of great attractions to see and do	54%∀
Is a place that inspires me	53%
Has great shopping	47%
Has great historical & cultural experiences	38%
Has great dining and food experiences	38%∀
Has a unique culture that I would want to experience on a vacation	36%
Has vibrant art scene	33%
None of these	5%

Has beautiful outdoor scenery and landscapes	74%
Is a safe place to visit	71%
Is a great place to see wildlife in its natural habitat	69%
Offers adventures that everyone can enjoy	67%
Is a place that allows me to de-stress	67%
Combines the best of both outdoor activities and city experiences	67%
Has great outdoor activities I would participate in	<b>66%</b> ▼
Is a place to form lifelong memories	64%
Has people that are friendly and welcoming	62%
Is a place to spend quality time with friends and/or family	62%
Is easy to travel to from where I live	61%
Is a great place for regular vacations that avoid surprises	61%
Is a place where I can experience things that I can't experience at home	60%

▲ / ✓ Significantly higher/lower than 2020 GTW wave.

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1500) MP5\_NEW. We are interested in your general impressions about destinations, even if you have never been there. Please select all the destination you think apply to the statement. Select None of these if you think none of the destinations apply.



### **Key Barriers for Visiting Canada**

Similar to 2020, health risks and cost concerns continue to stand out as the top deterrents for potential Mexican travellers to visit Canada in 2021. However, concerns about health risks have declined in importance compared to the previous year, especially among those 18-34 years.

Health risks	29%
Cost	29%
Poor weather	26%
Visa requirements	23%
Safety concerns	14%
Delays and hassles at airports and borders	14%
Poor value for money	14%
Electronic Travel Authorization (eTA) requirements	13%
Unfavourable conditions for driving during winter	11%
Unfavourable exchange rate	11%
There are other places I would rather visit	10%
ble to take vacation during months when I want to visit Canada	9%
Language barrier/don't speak my language	9%
Too many crowds at the places I want to visit in Canada	8%
Not enough time to take a vacation	8%
Don't know enough about it	8%
Destinations and attractions too far apart	8%
There is no reason to visit anytime soon	<b>6%</b>
Too far/flight too long	4%
Doesn't have the cultural experiences I'm looking for	4%
Have been to all the places I wanted to go in Canada	■ 2%
Nothing would prevent me from travelling to Canada	11%

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1500) MP9. Which of the following factors might discourage you from visiting Canada? (Select all that apply)

Unab

# **Vacation Interests**



### **Activities Interested in While on Holiday**

Mexican travellers have a wide variety of vacation activity interests, including both nature-based and city-based activities. Interest is highest for seeing the Northern lights, trying local food and drink, and nature parks.

Shopping for clothes/shoes	<b>■</b> 17%¥
Self-guided driving tours/road trips	17%
Cruises	17%
Spring blossoms	16%
Ziplining	<b>■</b> 16%¥
Sporting events	15%
Movie festivals	15%
Agricultural or country farm tours	■ 15%
Guided boat tours	14%
Renting a recreational vehicle (RV)	12%
Guided airplane or helicopter tours	■ 12%
Road cycling	<b>11%</b>
Comedy festivals	<b>11%</b>
Casual biking	<b>11%</b>
Shopping for luxury items	■ 7%∀
Rodeos	<b>7%</b>
Golfing	<b>7%</b>
None of the above	2%

33%	Guided nature tours
33%	Viewing wildlife or marine life
32%	Exploring Indigenous culture, traditions or history
32%	Food and drink festivals or events
32%	Shopping for items to remember my trip
29%	Fall colours
28%	Exploring places most tourists won't go to
28%	Winter festivals
<b>27%</b> ✓	Live shows
<b>27%</b> ✓	Music festivals
27%	Guided train tours
25%	Kayaking, canoeing or paddle boarding
25%	Downhill skiing or snowboarding
21%	Fishing or hunting
21%	Culinary tours or cooking classes
21%	Spa or wellness centres
19%	Scuba diving
18%	Travelling to remote destinations
■■ 18%	Mountain biking

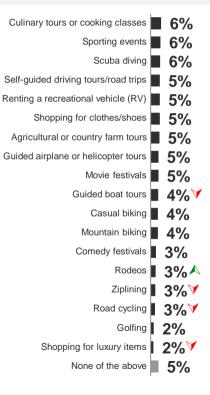
Northern lights	55%
Trying local food and drink	53%
Nature parks	50%
Fine dining	49%
Hiking or walking in nature	49%
Natural attractions like mountains or waterfalls	48%
+ Oceanside beaches	45%
Art galleries or museums	42%
Snowshoeing or cross country skiing	41%
Guided city tours	39%
City green spaces like parks or gardens	39%
Historical, archaeological or world heritage sites	38%∀
Camping	38%
Nightlife	37%
Amusement or theme parks	35%
Breweries or wineries	34%
Cultural or traditional festivals	34%
+ Lakeside beaches	34%

\* New statement in 2021 GTW – no trending.
 Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1500)
 MP10. In general, what activities or places are you interested in while on vacation? (Select all that apply)



### Activities to Base an Entire Trip Around

Seeing the Northern lights is also the top activity that Mexican travellers would base a trip around, which presents a key opportunity for Canada. Natural attractions like mountains and waterfalls are also a strong trip anchor, although interest is down compared to 2020.



Northern lights	40%	Guided train tours	11%
Natural attractions like mountains or waterfalls	24%	Amusement or theme parks	11%
Nature parks	23%	Exploring Indigenous culture, traditions or history	11%
Fine dining	22%	Winter festivals	11%
Trying local food and drink	18%	Snowshoeing or cross country skiing	∎ 11%∀
Historical, archaeological or world heritage sites	17%	Food and drink festivals or events	10%
+ Oceanside beaches	17%	Music festivals	10%
Nightlife	16%	Shopping for items to remember my trip	9%
Hiking or walking in nature	15%	City green spaces like parks or gardens	9%
Art galleries or museums	∎ 15%∀	Cruises	9%
Guided nature tours	14%	Downhill skiing or snowboarding	9%
Breweries or wineries	14%	+ Lakeside beaches	8%
Viewing wildlife or marine life	14%	Kayaking, canoeing or paddle boarding	8%
Exploring places most tourists won't go to	13%	Live shows	8%
Cultural or traditional festivals	13%	Spa or wellness centres	7%
Fall colours	13%	Spring blossoms	7%
Camping	13%	Fishing or hunting	6%
Guided city tours	11%	Travelling to remote destinations	6%

▲ /▼ Significantly higher/lower than 2020 GTW wave.

+ New statement in 2021 GTW - no trending.

Base: Long-haul pleasure travellers (past 3 years or next 2 years) answering (n=1478) MP12. Among these activities, are there any that are important enough that you would base an entire trip around that activity? (Select all that apply)

### Time of Year Would Participate in Activities While on Holiday<sup>+</sup>

Winter is the preferred season for seeing the Northern Lights, while trying local food and drink and fine dining are popular year-round. Many of the listed vacation activities are more popular in spring than summer.

	Summer	Fall	Winter	Spring
Northern lights	10%	22%	78%	14%
Trying local food and drink	54%	46%	43%	61%
Nature parks	37%	25%	16%	63%
Fine dining	51%	42%	41%	54%
Hiking or walking in nature	44%	33%	20%	63%
Natural attractions like mountains or waterfalls	44%	22%	22%	48%
+ Oceanside beaches	71%	9%	6%	52%
Art galleries or museums	46%	47%	42%	48%
Snowshoeing or cross country skiing	n/a	n/a	100%	n/a
Guided city tours	46%	40%	33%	55%
City green spaces like parks or gardens	44%	26%	18%	71%
Historical, archaeological or world heritage sites	44%	37%	24%	50%
Camping	49%	28%	18%	52%
Nightlife	54%	33%	38%	47%
Amusement or theme parks	54%	25%	15%	57%
Breweries or wineries	53%	37%	25%	51%
Cultural or traditional festivals	42%	36%	26%	51%
+ Lakeside beaches	60%	13%	9%	57%

	Summer	Fall	Winter	Spring
Guided nature tours	32%	29%	26%	58%
Viewing wildlife or marine life	49%	16%	13%	61%
Exploring Indigenous culture, traditions or history	50%	41%	36%	59%
Food and drink festivals or events	49%	37%	33%	54%
Shopping for items to remember my trip	51%	42%	44%	50%
Fall colours	n/a	1 <b>00%</b>	n/a	n/a
Exploring places most tourists won't go to	29%	28%	35%	41%
Winter festivals	n/a	n/a	100%	n/a
Live shows	55%	37%	27%	53%
Music festivals	51%	32%	24%	51%
Guided train tours	20%	41%	43%	35%
Kayaking, canoeing or paddle boarding	61%	18%	13%	54%
Downhill skiing or snowboarding	n/a	n/a	100%	n/a
Fishing or hunting	43%	21%	18%	55%
Culinary tours or cooking classes	48%	38%	35%	56%
Spa or wellness centres	49%	18%	20%	53%
Scuba diving	61%	14%	11%	56%
Travelling to remote destinations	45%	32%	26%	43%

	Summer	Fall	Winter	Spring
Mountain biking	45%	34%	22%	52%
Shopping for clothes/shoes	40%	26%	33%	49%
Self-guided driving tours/road trips	34%	39%	24%	46%
Cruises	49%	13%	13%	46%
Spring blossoms	n/a	n/a	n/a	100%
Ziplining	58%	20%	13%	53%
Sporting events	49%	30%	32%	52%
Movie festivals	43%	41%	44%	40%
Agricultural or country farm tours	29%	15%	11%	63%
Guided boat tours	54%	9%	11%	50%
Renting a recreational vehicle (RV)	37%	26%	25%	46%
Guided airplane or helicopter tours	40%	22%	30%	46%
Road cycling	45%	33%	20%	56%
Comedy festivals	38%	33%	32%	55%
Casual biking	40%	26%	21%	56%
Shopping for luxury items	33%	36%	48%	45%
Rodeos	51%	25%	14%	40%
Golfing	43%	27%	26%	58%

+ New question in 2021 GTW - no trending.

>50% of respondents who are interested in the activity would participate in this season

40-49% of respondents who are interested in the activity would participate in this season

Base: Long-haul pleasure travellers (past 3 years or next 2 years) interested in activity MP10A. Thinking about activities or places you are interested in while on vacation, when would you typically take part in these activities? (Select all that apply) Note that the seasons refer to the destination's seasons.



### **Sustainable Travel**

- Almost three-guarters of Mexican travellers say they are thinking about their personal impact on travel destinations, although comparatively fewer say they would pay more for socially responsible and environmentally-friendly options.
- A strong majority of those interested in taking a trip to Canada consider it to be an environmentally-friendly and socially responsible travel destination.
- However, a much smaller number mention the availability of eco-friendly (24%) or socially responsible (13%) travel options as factors influencing their choice of Canada as a travel destination.<sup>1</sup>

*I consider Canada to be an environmentally-friendly travel destination	52%		33%	86%
*I consider Canada to be a socially responsible travel destination	46%		37%	83%
I select travel destinations that have invested in socially responsible tourism practices	34%	40%	74%	
I consider the impact that I personally have on the destinations I visit	34%	38%	72%	
I select travel destinations that have invested in reducing their environmental impact	32%	37%	70%	
I purposely avoid visiting crowded destinations	29% \land	37%	66%	
For an equivalent experience, I am willing to pay a higher price for a socially responsible travel option over one that is not	26%	35%	61%	
For an equivalent experience, I am willing to pay a higher price for an environmentally-friendly travel option over one that is not	24%	36%	60%	

Strongly agree Somewhat agree

▲ / Significantly higher/lower than 2020 GTW wave.

<sup>1</sup> Data can be found on page 32. + Base: Asked among those in the dream to purchase stages of the path to purchase for Canada (n=1294) Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1500) PC31. Sustainable travel refers to "travel that minimises any negative impact 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". Please indicate your level of agreement with each of the following statements ...

# Key Characteristics of Future Trips to Canada



### **Factors Influencing Destination Choice**

- Destination safety, the opportunity to relax, and a longstanding desire to visit are the top factors influencing Mexican travellers to choose Canada as a holiday destination.
- Outdoor experiences and seeing a great deal have decreased in importance as reasons to choose Canada since 2020.

Is a safe place to visit	39%	Has adequate health and safety policies in place	21%	+Is a destination that offers socially responsible travel options that support the local community	13%
Opportunity to relax, unwind, and decompress	34%	If it fits my travel budget	19%	l saw a picture or a post from someone in my personal social network	12%
Is somewhere I have always wanted to visit	33%	Is a place where I could pursue my personal passions	17%	I want to visit with my friends or family	11%
Offers cultural experiences I am interested in	29%	Have visited before and wanted to return	17%	l saw an article or video on a news or lifestyle website	11%
Is a great family destination	28%	Offers culinary activities I am interested in (e.g. food or winery tour)	16%	Offers sports or outdoor activities I wanted to do (e.g. ski, golf)	10%
Offers outdoor experiences I am interested in	28%∀	Offers travel activities I am			
Offers city experiences I am interested in	27%	interested in (e.g. cruise, train, or RV trips)	15%	I saw it on a television program	8%
Is a destination that offers eco- friendly travel activities	24%	Seeing a great trip itinerary	14%	Is recommended by a travel agent or tour operator	8%
y friends or family recommend it	22%	Offers great opportunities to share my trip on social media	13%	I saw it on a channel I subscribe to or a personality I follow on social media	4%
Is a place where I could gain a new perspective on my world	22%	Seeing a great deal	13% 🏹	Other	2%

New statement in 2021 GTW – no trending.
 Base: Long-haul pleasure travellers (past 3 years or next 2 years) considering Canada (n=365)
 FT3. Which of the following would factor into your choice to travel to Canada? (Select all that apply)

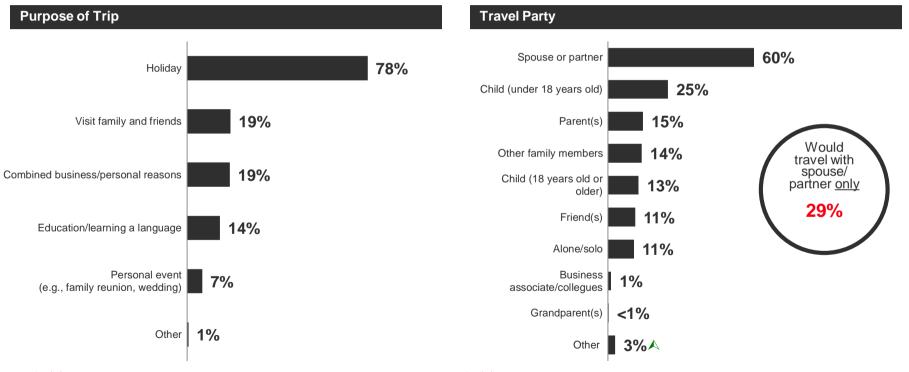


(

Μ

### Main Purpose and Travel Party of Future Trip

- Holiday trips will drive Mexican travel to Canada in the next 2 years, with VFR travel (trips to visit friends and relatives) and combined business/leisure travel playing a smaller role.
- Mexican travel parties visiting Canada will be largely be made up of immediate family primarily couples trips or family trips with children.



▲ /▼ Significantly higher/lower than 2020 GTW wave

Base: Long-haul pleasure travellers (past 3 years or next 2 years) considering Canada (n=365) FT2. If you took a trip to Canada, what would be the main purpose of this trip?

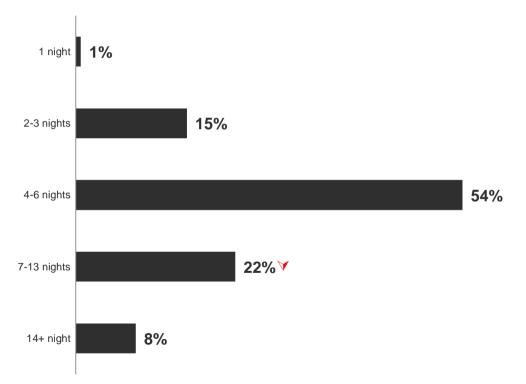
▲ /▼ Significantly higher/lower than 2020 GTW wave.

Base: Long-haul pleasure travellers (past 3 years or next 2 years) considering Canada (n=365) FT5. Who would you travel with on a trip to Canada? (Select all that apply)



### Length of Future Trip

Mexican travellers typically would like to spend at least four nights in Canada, with the highest preference for a trip of 4-6 nights. While a considerable number of Mexican travellers are interested in spending 1-2 weeks in Canada, that number has dropped since 2020.



/V Significantly higher/lower than 2020 GTW wave.
 Base: Long-haul pleasure travellers (past 3 years or next 2 years) considering Canada (n=365)
 FT4. How many nights do you think you would spend on a trip to [destination]?

### **Trip Type and Accommodation for Future Trip**

- ▶ Most Mexican travellers would prefer to travel independently on a trip to Canada, either with or without the addition of some guided excursions as part of the trip.
- Mid-priced hotels continue to stand out as the most preferred type of accommodation for a trip to Canada, while mentions of luxury hotels have declined since 2020.

Тгір Туре		Type of Accommodation	
Fully independent touring trip (i.e. visiting several destinations on your own)	31%	Mid-priced hotel/motel 34% Bed & Breakfast (B&B) 26%	
Independent touring trip with some guided day or overnight excursions	24%	Rented house, apartment or condominium 24% Budget hotel/motel 23%	
Fully escorted or guided group tour to several destinations	16%	Guest ranch, farm or lodge 23%	
All-inclusive or semi-inclusive resort stay (including beach, ski, nature, country or golf resort)	13%	Home of friends or relatives 13% Resort 12%	
Trip to a single city or place	8%	+Unique accommodation (e.g. treehouse, tiny homes, eco-domes, etc.) Luxury hotel 11%	
A visit to friends or relatives	3%	Hostel, university or school dormitory <b>10%</b> Camping or trailer/RV park <b>10%</b>	
Cruise	2%	+Glamping (e.g. camping with comfortable amenities and, in some cases, resort-style services or catering)	
Don't know	5%	Own cottage or second home 3%   Other 2%	
	I		

✓ / ✓ Significantly higher/lower than 2020 GTW wave. Base: Long-haul pleasure travellers (past 3 years or next 2 years) considering Canada (n=365) FT9. What type of trip do you think you would be most likely to book likely to book for a trip to Canada? (Select one)

- ▲ / ✓ Significantly higher/lower than 2020 GTW wave.
- + New statement in 2021 GTW no trending.

Base: Long-haul pleasure travellers (past 3 years or next 2 years) considering Canada (n=365) FT10. Which types of accommodation would you consider staying at during a trip to Canada? (Select all that apply)



### **Activities Interested in on Future Trip to Canada**

There is a strong preference among Mexican travellers for nature-based activities on a trip to Canada, with interest in seeing the Northern Lights as the top activity. followed by nature parks, snowshoeing or cross country skiing, hiking or walking in nature, and natural attractions.

Self-guided driving tours/road trips	20%
Agricultural or country farm tours	19%
Spa or wellness centres	18%
Ziplining	18%
Guided boat tours	16%
Movie festivals	15%
Renting a recreational vehicle (RV)	15%
Cruises	15%
Sporting events	14%
Road cycling	14%
Comedy festivals	13%
Scuba diving	13%
Shopping for clothes/shoes	13%
Guided airplane or helicopter tours	11%
Casual biking	11%
Shopping for luxury items	10%
Golfing	9%
Rodeos	7%
None of the above	1%

31%	Historical, archaeological or world heritage sites
31%	Exploring Indigenous culture, traditions or history
31%	Shopping for items to remember my trip
31%	Guided nature tours
30%	Music festivals
30%	Breweries or wineries
30%	Exploring vibrant multicultural cities
29%	Viewing wildlife or marine life
28%	Live shows
28%	Exploring French culture, traditions or history
28%	Food and drink festivals or events
25%	Guided train tours
24%	Kayaking, canoeing or paddle boarding
24%	Culinary tours or cooking classes
23%	Exploring places most tourists won't go to
22%	Mountain biking
21%	Fishing or hunting
21%	Spring blossoms
21%	Travelling to remote destinations

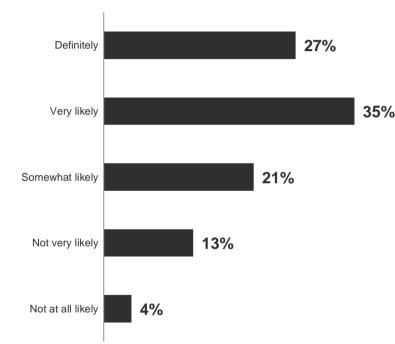
Northern lights	57%
Nature parks	51%
Snowshoeing or cross country skiing	48%
Hiking or walking in nature	48%
Natural attractions like mountains or waterfalls	46%
Trying local food and drink	43%
Fine dining	42%
City green spaces like parks or gardens	40%
Nightlife	38%
Camping	38%
Cultural or traditional festivals	37%
Art galleries or museums	36%
+ Lakeside beaches	36%
+ Oceanside beaches	35%
Guided city tours	34%
Winter festivals	34%
Amusement or theme parks	32%
Fall colours	32%
Downhill skiing or snowboarding	31%

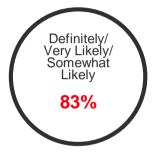
New statement in 2021 GTW – no trending.
 Base: Long-haul pleasure travellers (past 3 years or next 2 years) considering Canada (n=365)
 FT11. What activities would you be interested in participating in during a trip to Canada? (Select all that apply)



### **Travel Agent Usage for Future**

Travel agents and tour operators play a substantial role in supporting travel from Mexico to Canada, with a large majority of potential Mexican visitors indicating that they are likely to use a travel agent to research or book a trip to Canada.





▲ /¥ Significantly higher/lower than 2020 GTW wave.

Base: Long-haul pleasure travellers (past 3 years or next 2 years) considering Canada (n=365)

FT6. 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. How likely are you to use a travel agent or tour operator to help you research or book a trip to [destination]?



37