Mexico Market Highlights – Facts at a Glance

An estimated 2 million Mexican long-haul pleasure travellers intend to visit Canada in the next two years.

2017 Performance

- **Arrivals**\(^1\)
  - **359K** (\(+47\%)\)
- **Average Trip Spend**\(^2\)
  - **$1,924**

- Arrivals success was earmarked by considerable expansion in air capacity between Mexico and Canada (up 71% over 2016), as well as continued positive windfall from changes to visa requirements in 2016.
- The increase in direct air capacity was driven largely by new services operated by Interjet to Montreal, Toronto and Vancouver, as well as Aeromexico’s expansion into Calgary.

Market Insights

- Pleasure and recreation travel to Canada grew more than any other trip purpose, up an estimated 114% over 2016.\(^2\)
- In 2017, Canada was ranked 3rd behind the US and Spain among countries Mexican travellers were considering visiting in the next 2 years.\(^5\)
- Three-quarters of recent Mexican visitors to Canada mentioned consulting a travel agent for their trip, either for research or booking.\(^5\)

2018 Forecast

- **Visitor Forecast**\(^2\)
  - **433K** (\(+19\%)\)
- **Spend Forecast**\(^2\)
  - **$741M** (\(+22\%)\)

- **Airline Seat Capacity**\(^3\)
  - \(+37\%\)
- **Local Currency vs CAD**\(^4\)
  - \(+2.7\%\)

Channel Investment Mix

- \(\text{Travel Trade: 16\%} \quad \text{Consumer Direct \& Earned Media: 84\%}\)

Travel Seasons\(^1\)

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<thead>
<tr>
<th>Month</th>
<th>Mexico</th>
<th>Destination Canada Market Average</th>
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<tbody>
<tr>
<td>Jan</td>
<td>5%</td>
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<td>Dec</td>
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Market Potential

2,661,500
Canada's target market

60%
are definitely/very likely to visit
Canada in the next 2 years

1,594,000
Canada’s immediate potential

Top Drivers

The main features that Mexican travellers desire in a destination are...

1. Intellectually stimulating travel experiences
2. Proud to tell people I have visited
3. Touring around to multiple destinations
4. Distinctive experiences during four seasons
5. Unique culture I want to experience on vacation
6. Safe place to visit
7. Spend quality time with friends and/or family
8. Allows me to de-stress
9. Cities are great for exploring and soaking in the atmosphere
10. Combines both outdoor activities and city experiences

Target Audiences

Authentic Experiencers 18-34

They want to get outside of their comfort zone by living like a local and experiencing things they can’t at home.

Key themes
Connect to authentic, culturally unique experiences with accompanying itineraries that are easy and compelling to act upon.

- Engaging with Canada’s natural beauty
  Participate in physically engaging outdoor activities while taking in Canada’s natural beauty.

- Discovering culturally engaging experiences
  Experience distinctively Canadian culture, personalities, and cuisine that can’t be found at home.

- Uncovering hidden gems
  Finding the lesser-visited attractions that will make their experience in Canada unique.

Free Spirits 35-54

They want to disconnect from their daily grind for with a trip to a cool place that will elevates their status

Key themes
Inspire with iconic and niche experiences that will make their experience in Canada unique and share-worthy:

- Exploring regions, not destinations
  Touring multiple destinations favouring experiences connecting urban and outdoor adventure.

- Experiencing Canada’s natural beauty
  Feeling wowed by beautiful landscapes and scenery; Seeing wildlife in its natural habitat.

- Experiencing vibrant cities
  Experiencing urban icons interspersed with local, niche experiences that take place both in and out of cities.

For further information, please contact:

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1. Statistics Canada, Frontier Counts, 2017
2. Destination Canada Research estimates, using Statistics Canada preliminary Q1-Q3 ITS, Frontier Counts and e311 adjusted data (April 2018)
3. IATA SRS Analyzer Data, March 2018
4. Tourism Economics, March 2018
5. Global Tourism Watch 2017