



1.5 million Mexican long-haul leisure travellers intend to visit Canada in the next two years.

2018 Performance



2018 Arrivals¹
404,400
(↑4.9%)



2018 Average Trip Spend²
\$1,575

Key Insights

- Mexico continued to set new records in 2018, surpassing the milestone of 400K annual travellers to Canada for the first time and doubling 2015 arrivals in just three years.¹
- The strong arrivals from Mexico through 2018 indicates a continuing positive trend after the initial progress following the changes to visa requirements at the end of 2016.
- Strong direct air arrivals were supported by a 35% expansion of air capacity between Mexico City and Canada in 2018 – the greatest increase in air capacity to Canada of all Destination Canada’s international markets.^{1,3}

2019 Forecast



Visitor Forecast²
438,780
(↑8.5%)



Spend Forecast (CAD)²
\$695 M
(↑13.4%)



Air Seat Capacity Growth³
↓4.6%

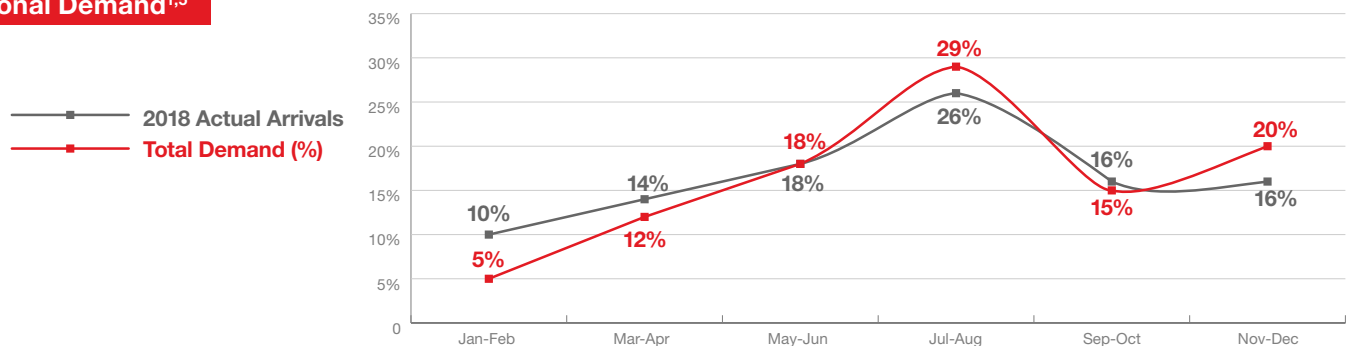


Local Currency vs. CAD⁴
↓1.7%

Market Insights

- In 2018, demand for travel to Canada was highest in July-August (29%) and November-December (20%) among Mexican leisure travellers.⁵
- Activities that Mexican travellers are most interested in experiencing include trying local food and drink, seeing nature parks and natural attractions, the northern lights, fine dining, places of historical and cultural significance and cross-country skiing.⁵
- 55% of Mexicans on their most recent trip to Canada booked an organized group travel package through a travel agent or tour operator, predominantly online.⁵

Seasonal Demand^{1,5}



¹ Statistics Canada, Frontier Counts, 2018.

² Destination Canada Research estimates, using Statistics Canada preliminary 2018 Q1-Q3 VTS, 2017 ITS Q4, Frontier Counts, National Tourism Indicators, Bank of Canada and visitor forecasts from Destination Canada 2019 Forecast.

³ IATA SRS Analyzer Data, March 2018.

⁴ Bank of Canada.

⁵ Global Tourism Watch 2018.



Market Potential⁵



Canada's target market
2,585,000



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

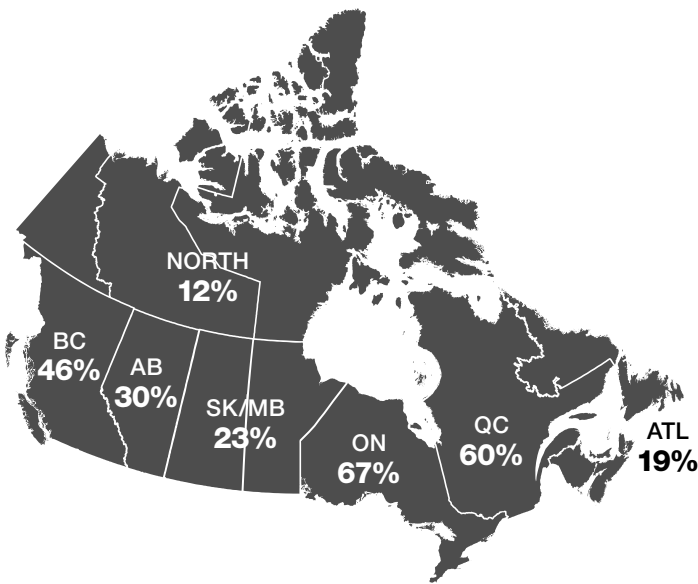


1,556,000
Canada's immediate potential

Top Drivers for Mexican Travellers to Any Destination⁵

- 1** Is a place I would be proud to tell people I have visited
- 2** Offers good value for money
- 3** Has a unique culture that I would want to experience on a vacation
- 4** Is a place that provides intellectually stimulating travel experiences
- 5** Has great historical & cultural experiences
- 6** Its cities have a lot of great attractions to see and do
- 7** Has beautiful outdoor scenery and landscapes
- 8** Is a place to spend quality time with friends and/or family
- 9** Its cities are great for exploring and soaking in the atmosphere
- 10** Is a place where I can experience things that I can't experience at home

Travel Consideration by Province,
% Likely to Visit Region⁵



Travel Agent/Tour Operator Usage
For Recent Trip to Canada⁵

Used for either research <u>or</u> booking	69%
Used for both research <u>and</u> booking	44%
Used for research <u>only</u>	15%
Used for booking <u>only</u>	10%

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⁵ Global Tourism Watch 2018.