2021 Global Tourism Watch Highlights Report

Mexico

Global Tourism Watch

Canada

DESTINATION CANADA

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.

Timing of Fieldwork

Oct

2021

Note: this study is conducted annually. Significant differences from the last wave in November 2020 are identified with ▲ / ▼.

Geographical Definition for Qualified Trips

Outside of: Mexico and Central America

GTW Sample Distribution

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

Recent visitors to Canada:	**245**
Other travellers:	**1,255**
Total sample size:	**1,500**

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.[1] 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).[2]

Outbound travel situation

Many top competitors were open to fully vaccinated travellers, but required PCR tests on arrival (e.g. Italy)[3], while others (e.g. US) were closed to visitors.[4] Mexico's vaccination rate was relatively low at 62%.[5] 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.[6]

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.[7]

[1] *Ogletree Deakins, October 2021.*
[2] *Crisis24, October 2021.*
[3] *Schengenvisa News, December 2021.*
[4] *Department of Homeland Security, October 2021.*
[5] *Wilson Centre, November 2021. 2021.*
[6] *Forbes, October*
[7] *Government of Canada, September 2021.*

Travel Indicators

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

Long-haul travel past 3 years

68% ▼

Intend to travel long-haul next 2 years

78% ▲

Intend to visit Canada next 2 years

56% ▲

Ever visited Canada

35% ▲

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

KEY HIGHLIGHTS

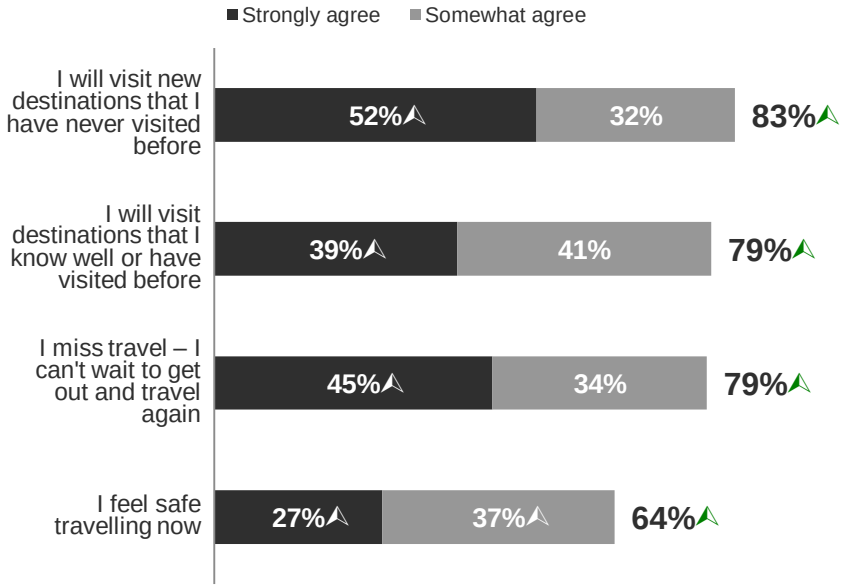
Insight	Implication
Mexican travellers are ready to travel again. Significantly more Mexican travellers say they feel safe travelling now, and the likelihood to use most forms of transportation has increased. Canada ranks 2nd only to the US on unaided consideration.	*There is an opportunity to capitalize 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.*

COVID-19 Considerations

Attitudes Toward Travel and Transportation Modes

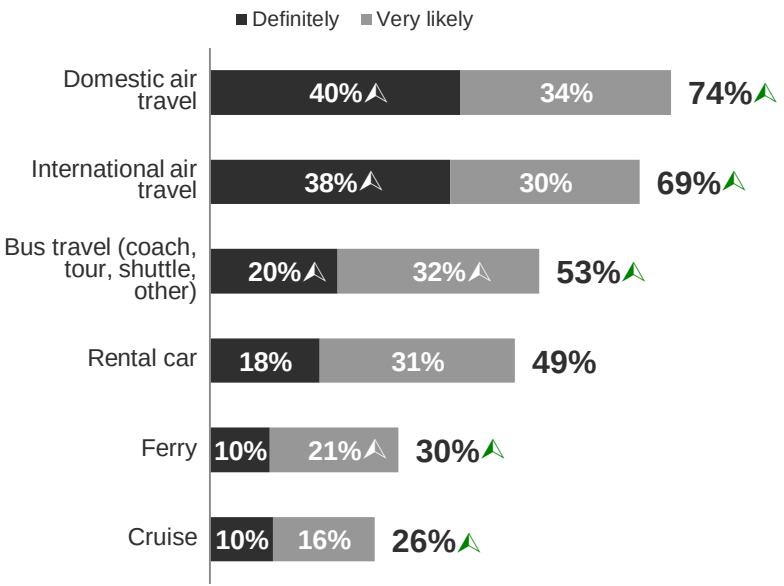
- Significantly more Mexican travellers say they feel safe travelling now (64%, up from 32% in 2020). Comfort levels have increased equally across all age groups, and Mexican travellers are more enthused about travel generally, with a slight preference for visiting new destinations over familiar ones.
- 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).

Attitudes Toward Travel



▲ / ▼ 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 or disagree with the following statements?

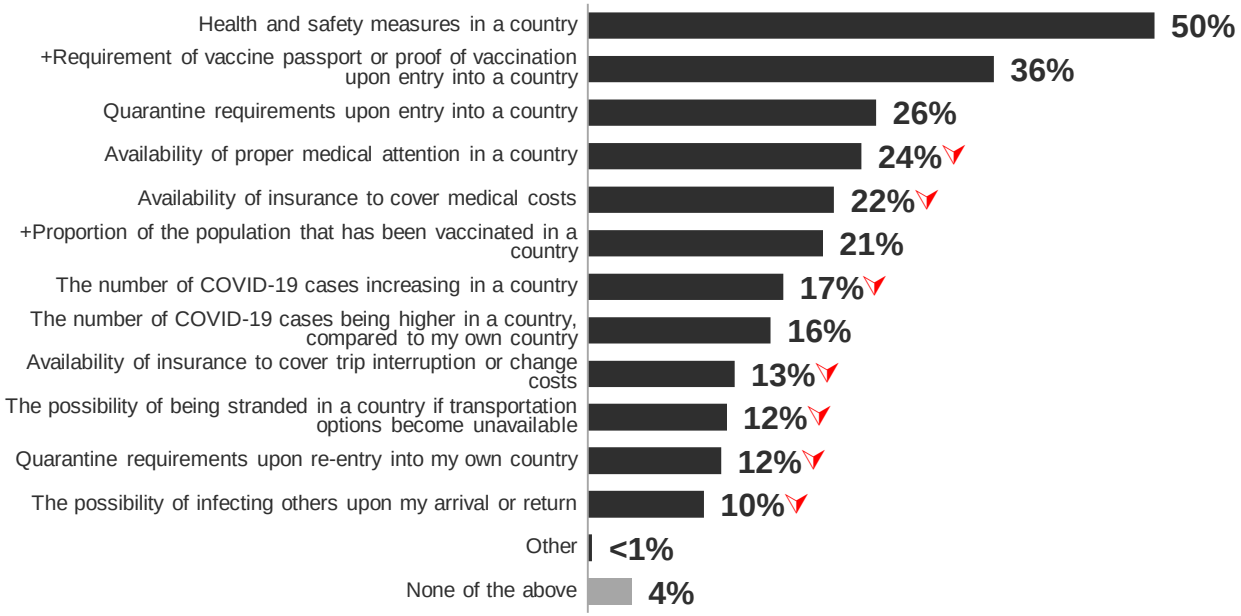
Transportation Modes



▲ / ▼ 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 quarantine 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 quarantine requirements for vaccinated travellers to enter Canada or upon return to Mexico.



/ 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)

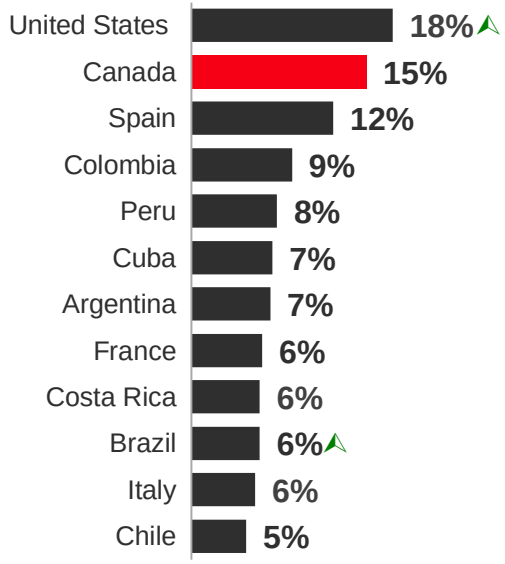
Key Performance Indicators

Unaided Long-Haul Destination Consideration (Next 2 Years)

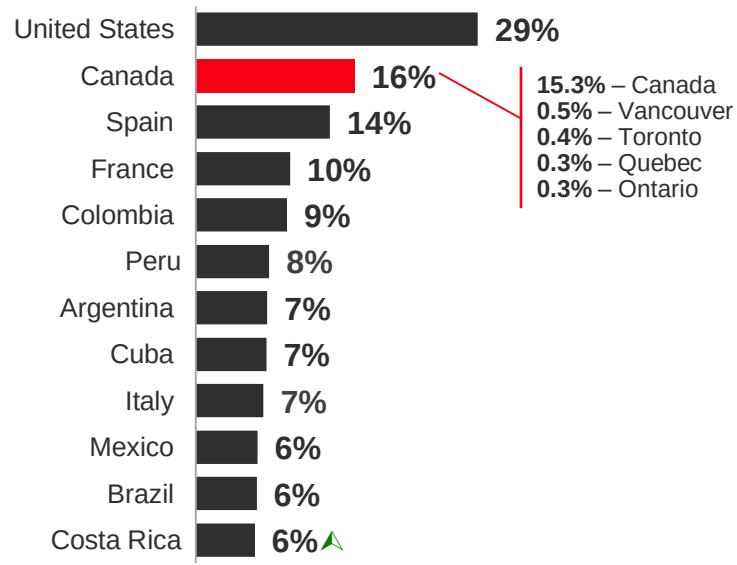
***Unaided consideration** represents the top-of-mind presence of destinations in the consumer mindset and requires travellers to think of destinations without being prompted.*

► 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 Brands[1]



Top 12 Destination Countries[2]



5% Don't know

22% Not planning to travel

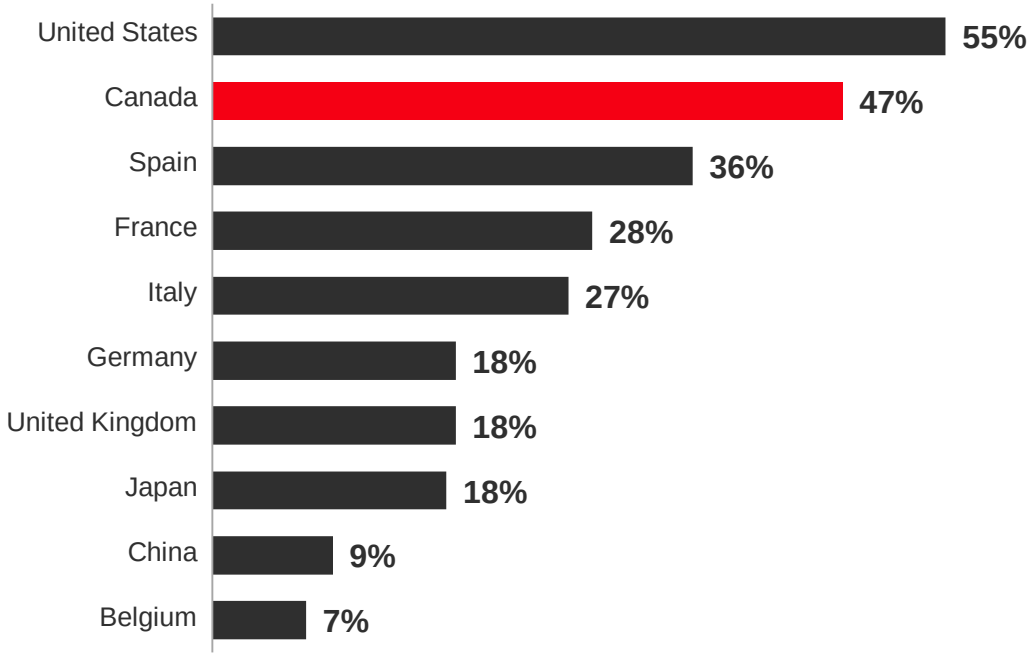
▲ / ▼ Significantly higher/lower than 2020 GTW wave.

[1] Responses as mentioned by respondents (e.g., percentage who said "Canada" specifically).
[2] 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)

Aided consideration *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.

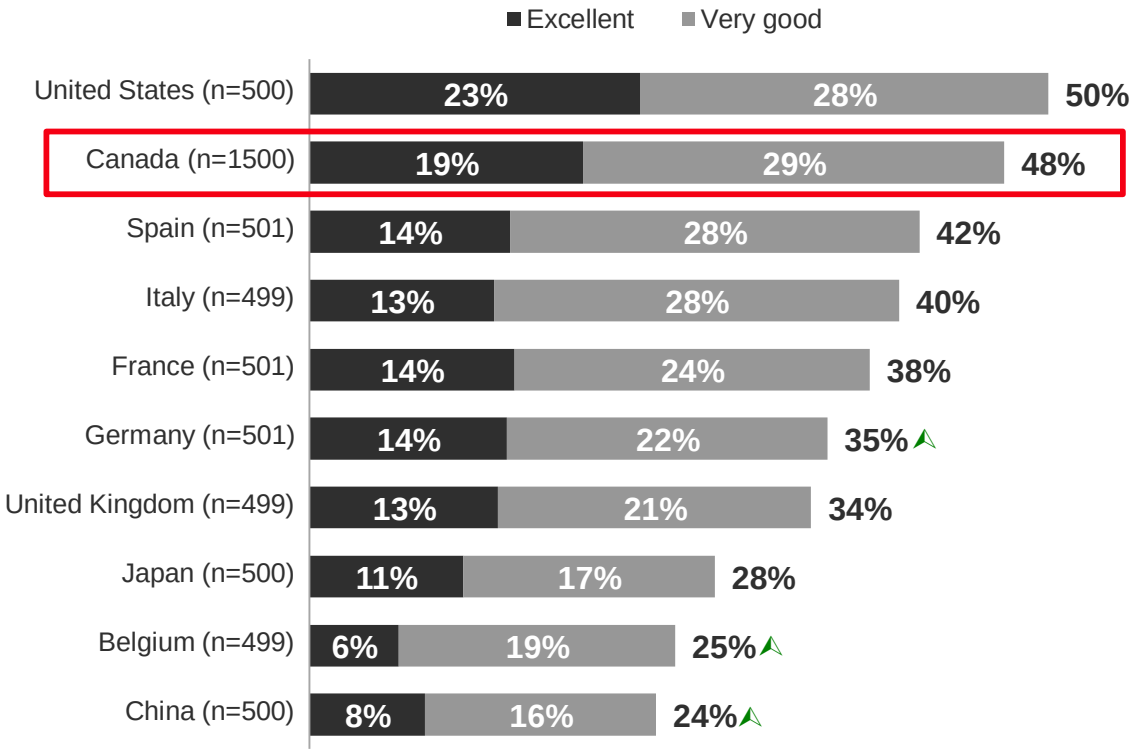


/ Significantly higher/lower than 2020 GTW wave.

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.

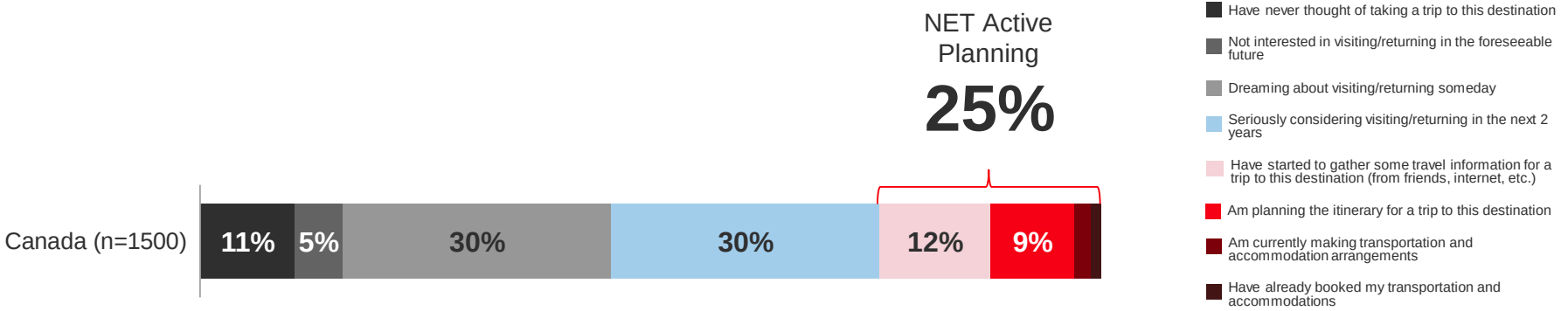


▲ / ▼ Significantly higher/lower than 2020 GTW wave.
Base: Long-haul pleasure travellers (past 3 years or next 2 years) evaluating each destination
MP3. How would you rate your level of knowledge of holiday opportunities in each of the following destinations?

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 2nd 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.



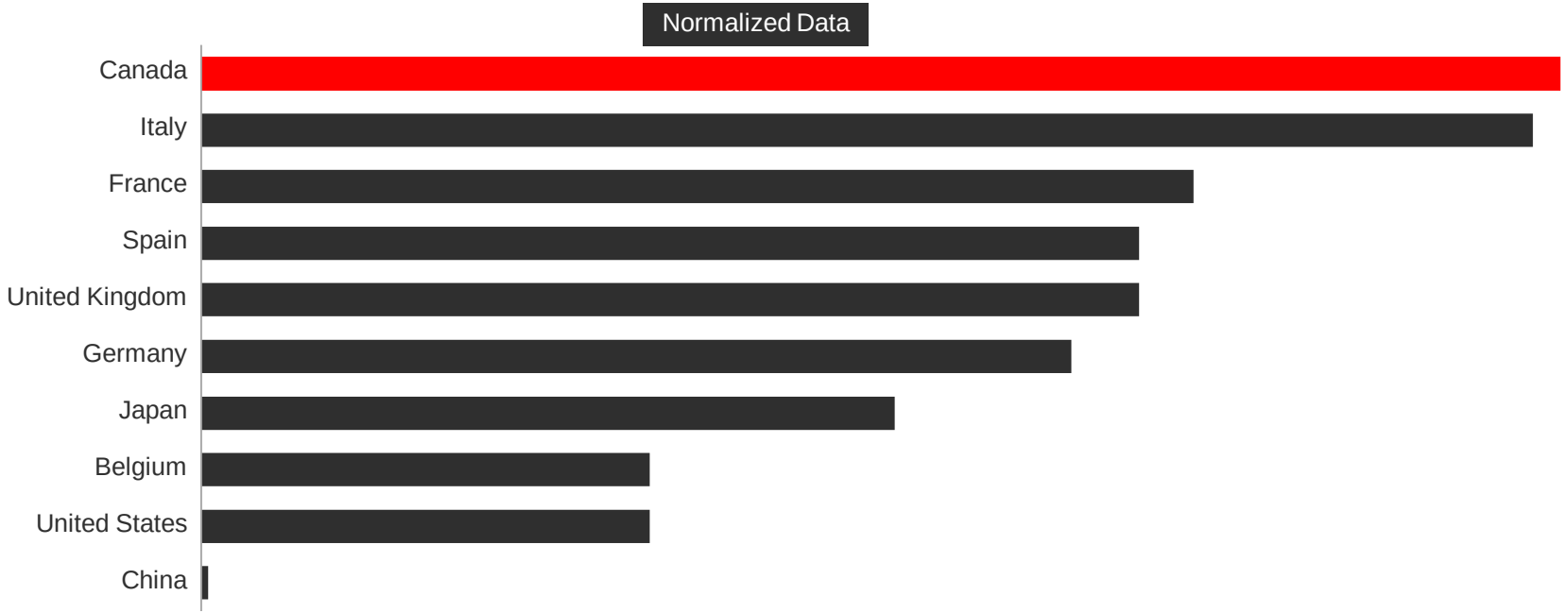
▲ / ▼ Significantly higher/lower than 2020 GTW wave.

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 1st overall, with a slight lead over Italy, but far ahead of the United States.

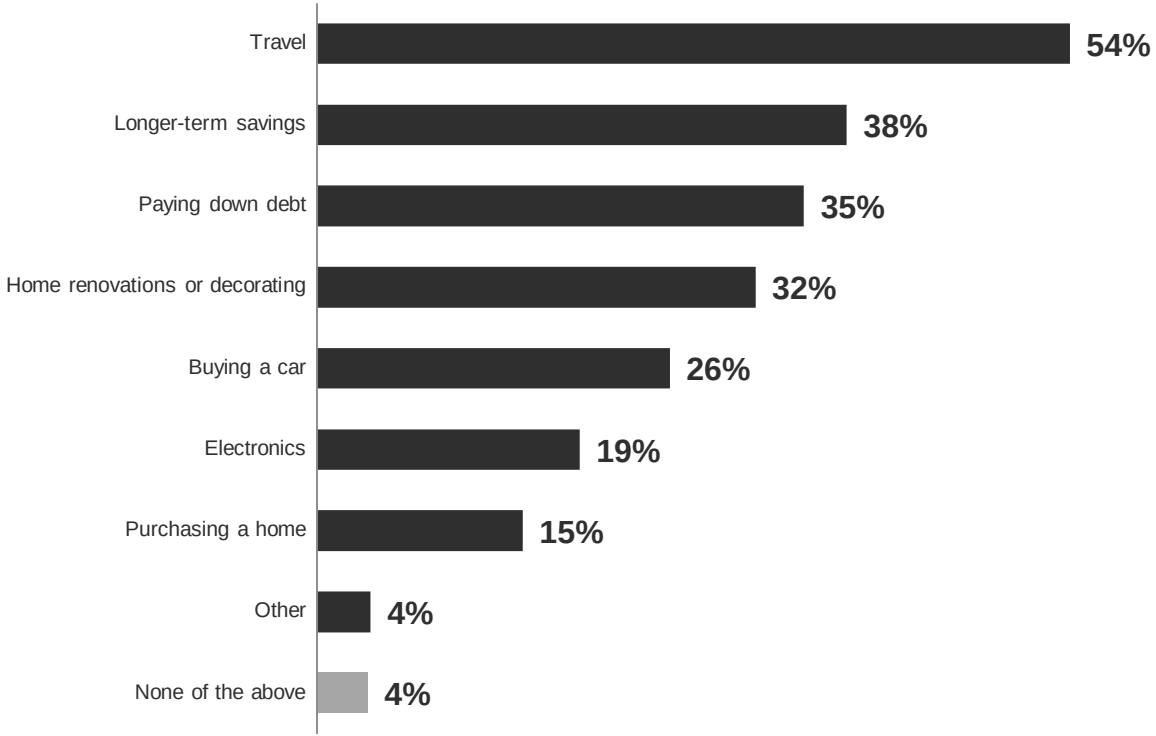


Base: Long-haul pleasure travellers (past 3 years or next 2 years) who have visited each destination
MP11. Whether you have visited or not, how likely are you to recommend each of the following holiday destinations to a friend, family member or colleague?

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.

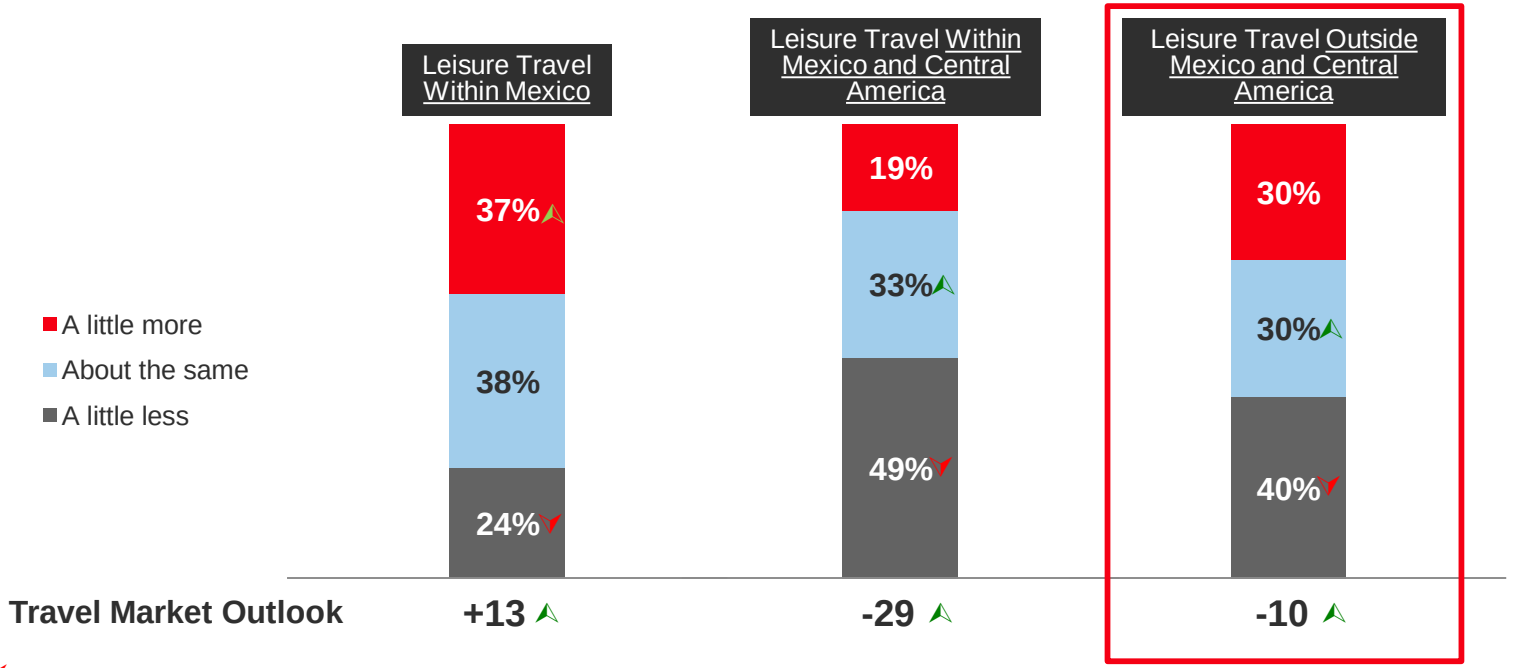


+ New question in 2021 GTW – no trending.
Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1500)
AT. In the next 12 months, which of following will you prioritize spending money on? (Select up to 3 options)

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+

- 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).

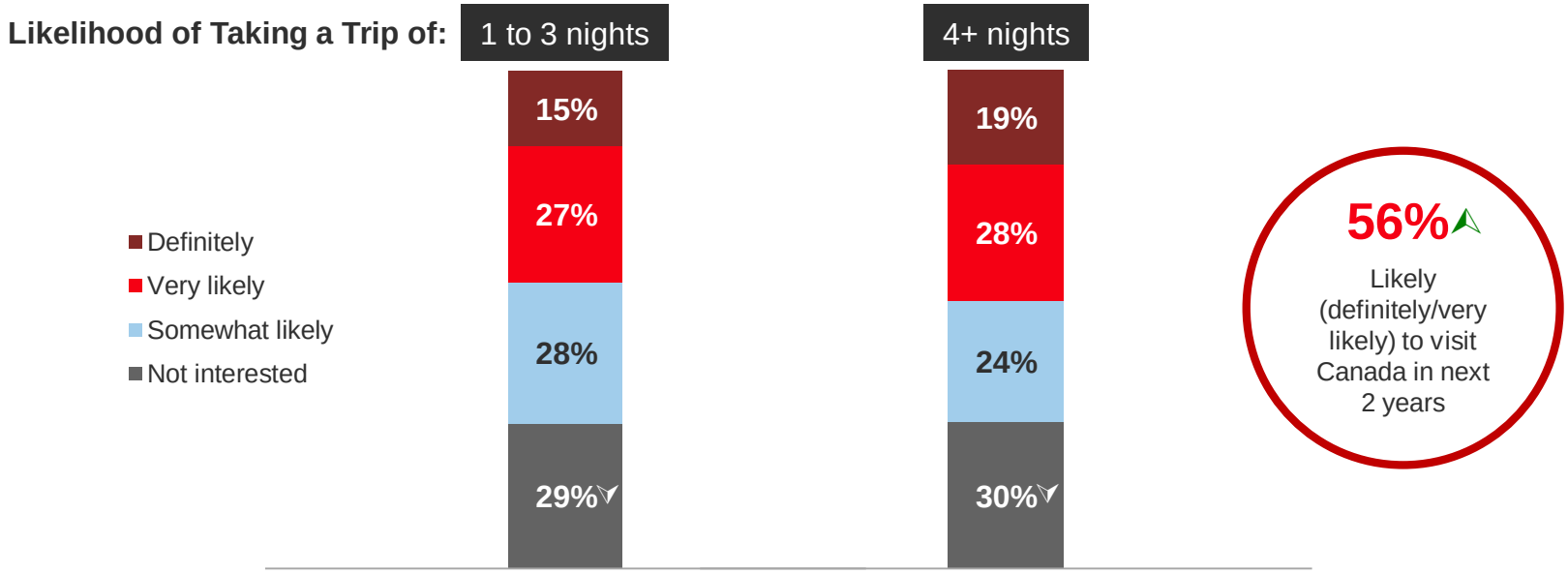
Mean Annual Household Spend on Vacation Trips

	PRE-COVID	POST-COVID	NET CHANGE (POST-COVID MINUS PRE-COVID)	
Travelling within Mexico	$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)
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.



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

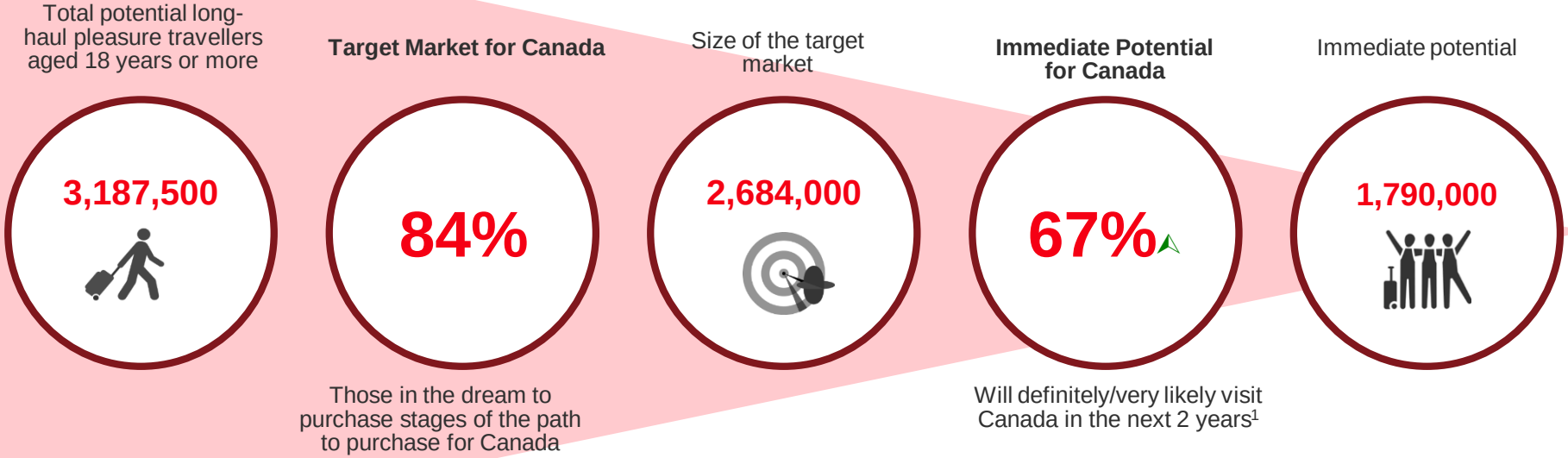
Note: Not interested is comprised of those saying not very likely, not at all likely, or indicating no intention to visit Canada.
Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1500)
MP6. Realistically, how likely are you to take a holiday trip to Canada in the next 2 years?

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.

[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=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?

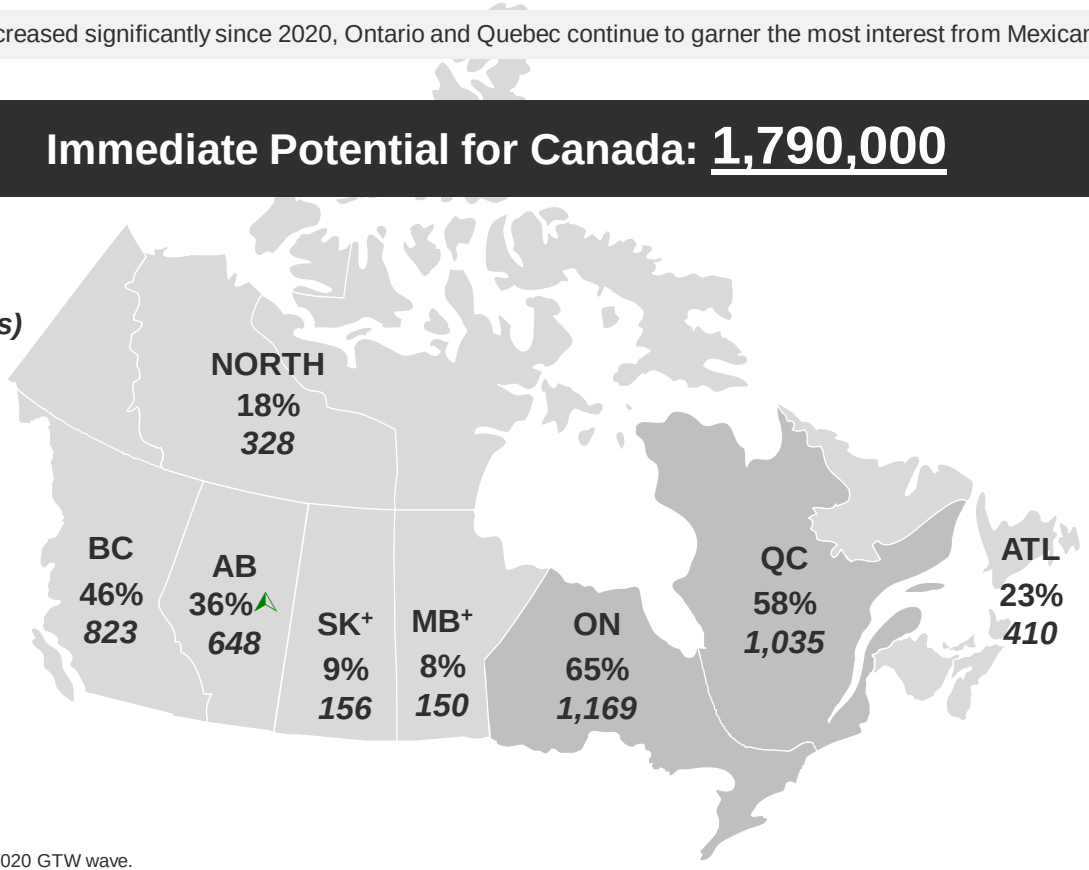
MP6. Realistically, how likely are you to take a holiday trip to Canada in the next 2 years?

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

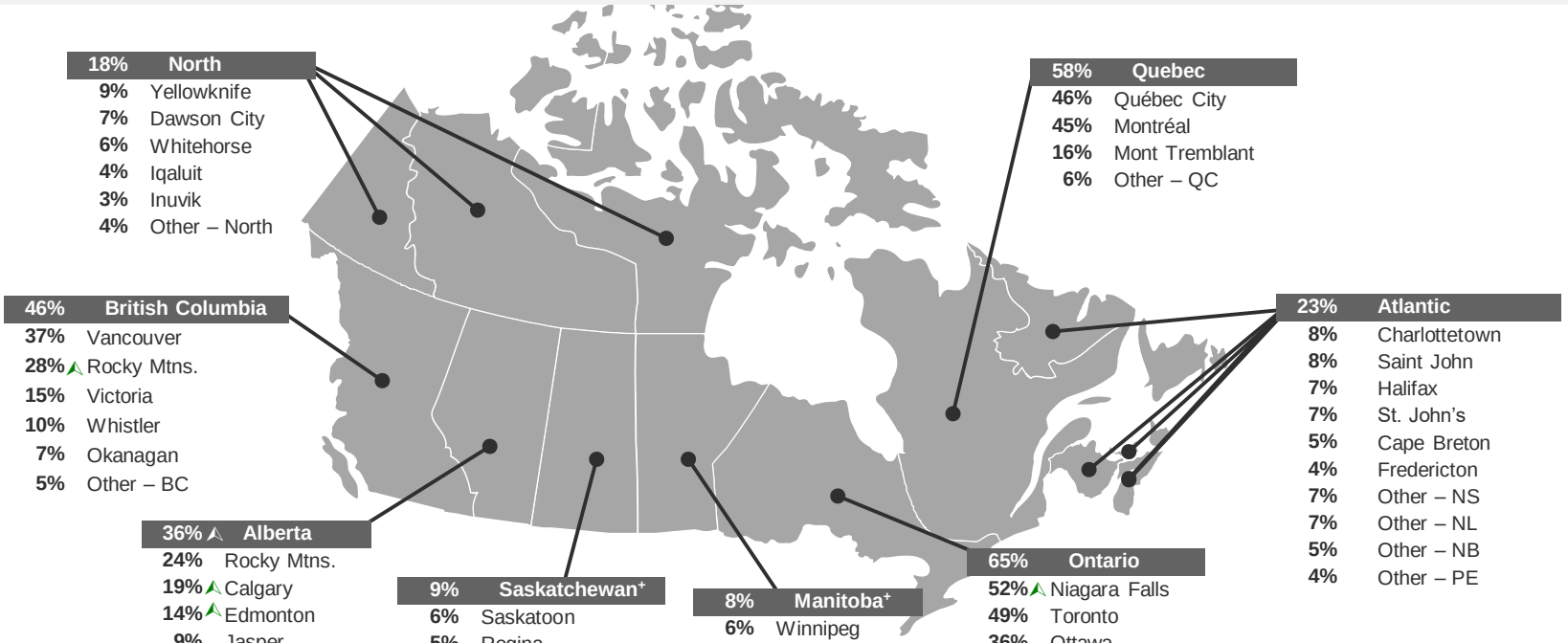
Key:
% likely to visit region
Immediate potential (000s)



▲ / ▼ 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 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.



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

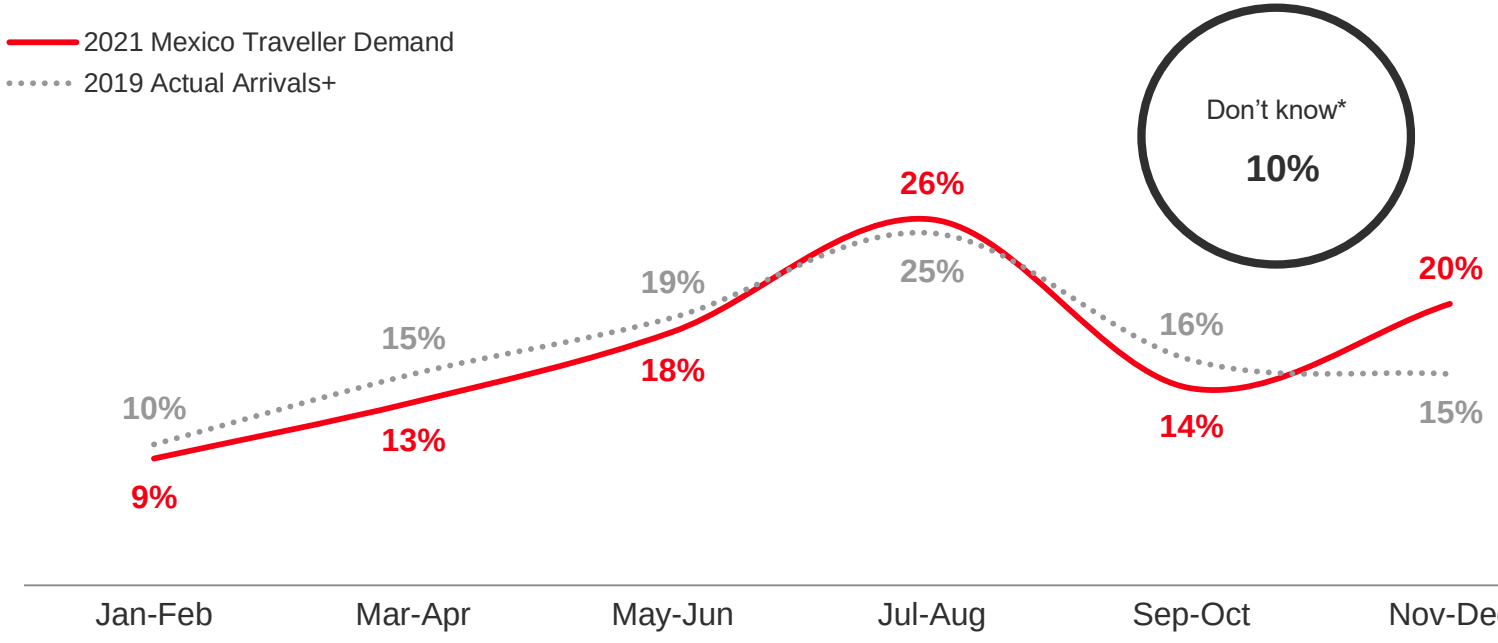
Base: Those in the dream to purchase stages of the path to purchase for Canada and definitely/very likely to take a trip to Canada (n=897)

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)

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.



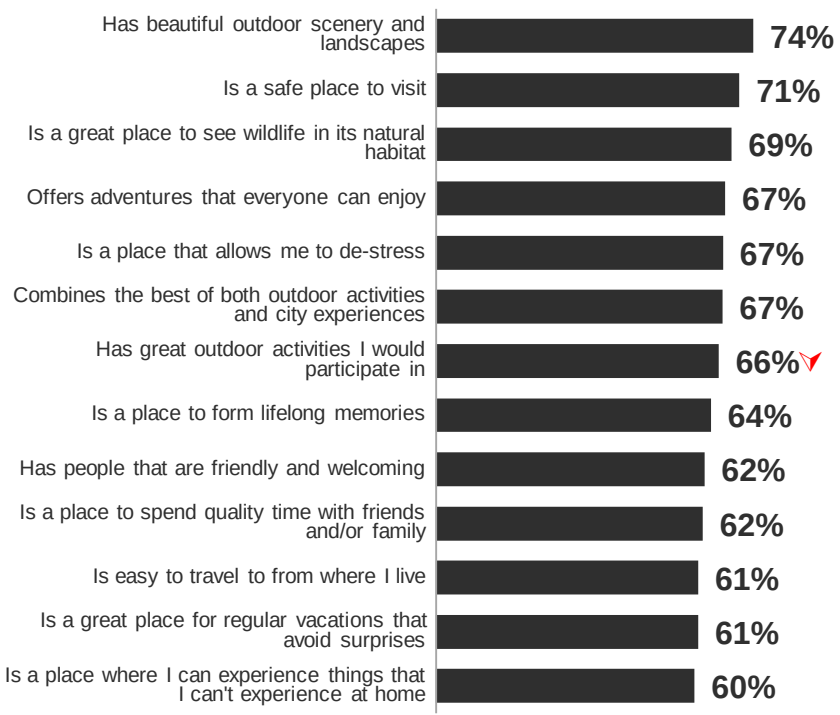
+ Source: 2019 Statistics Canada Frontier Border Counts.
* 'Don't know' responses excluded from seasonal demand chart.

▲/▼ 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.



/ 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.

/ Significantly higher/lower than 2020 GTW wave.

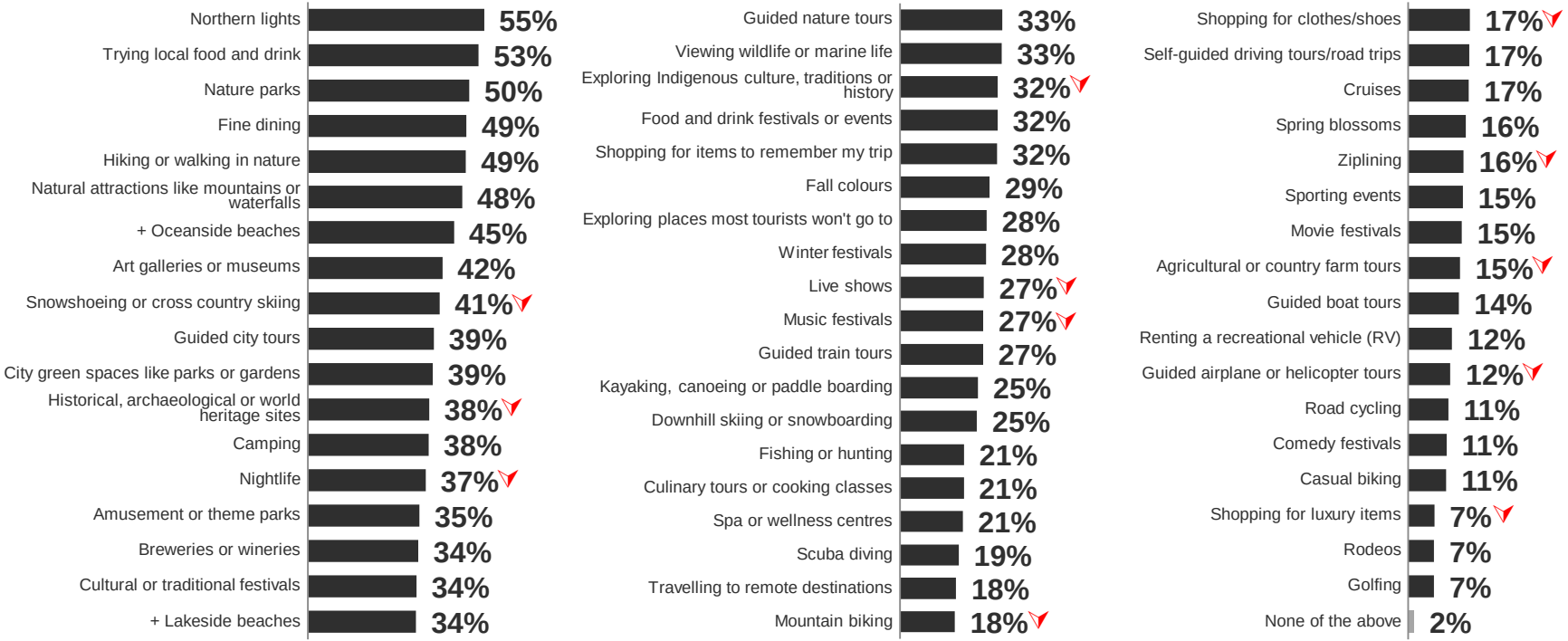
Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1500)

MP9. Which of the following factors might discourage you from visiting Canada? (Select all that apply)

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.

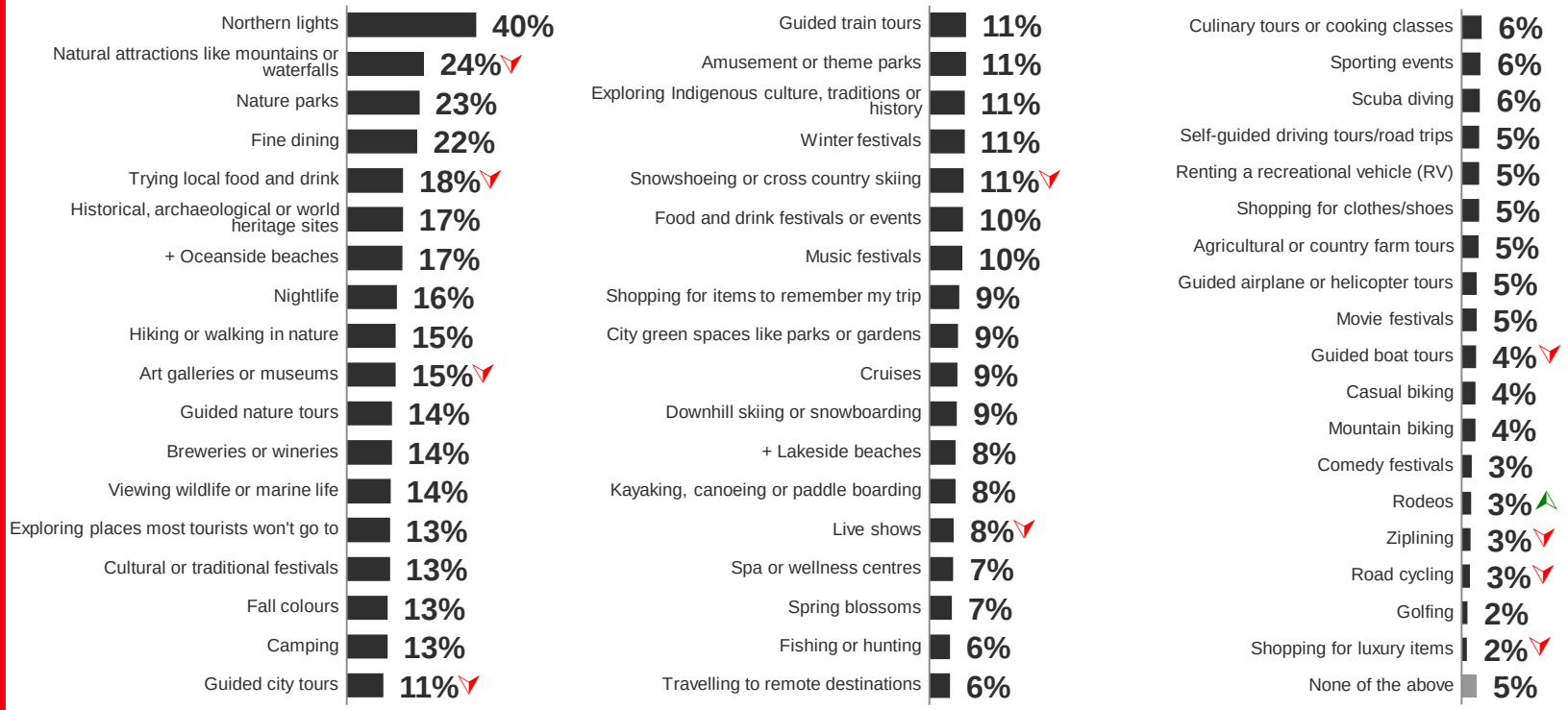


+ New statement in 2021 GTW – no trending.
Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1500)
MP10. In general, what activities or places are you interested in while on vacation? (Select all that apply)

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

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.



/ 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+

► 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	**100%**	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

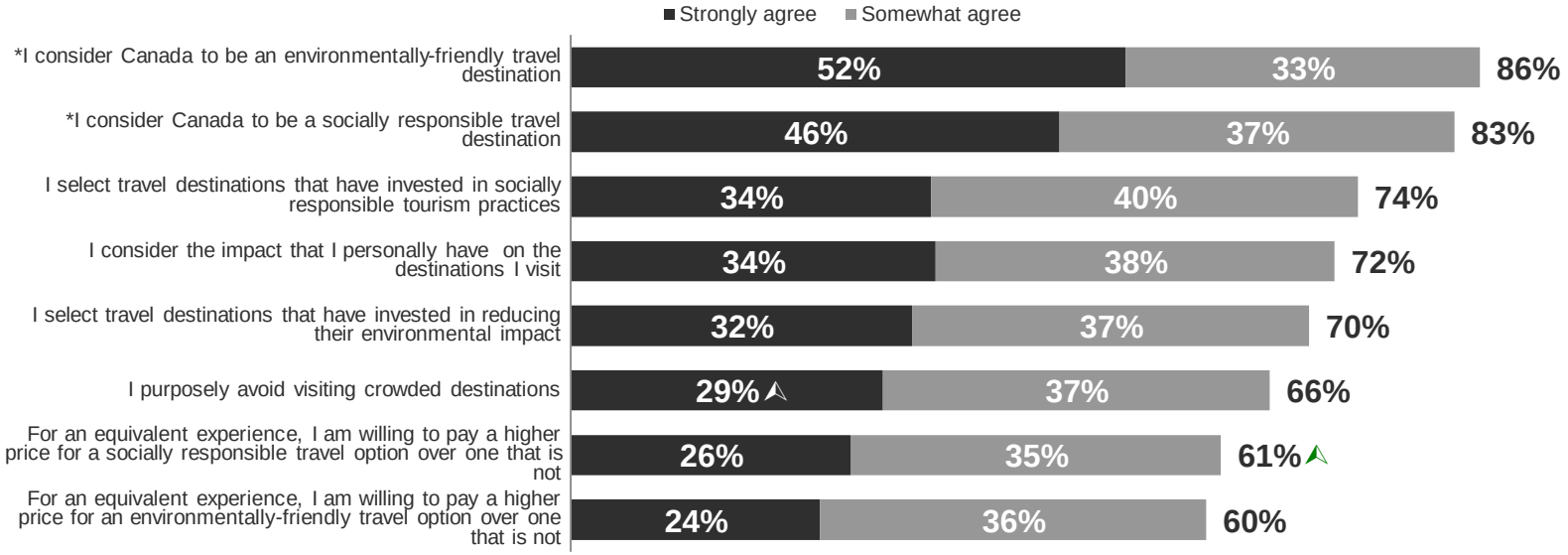
40-49% of respondents who are interested in the activity would participate in this season

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-quarters 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.[1]



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

[1] 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.

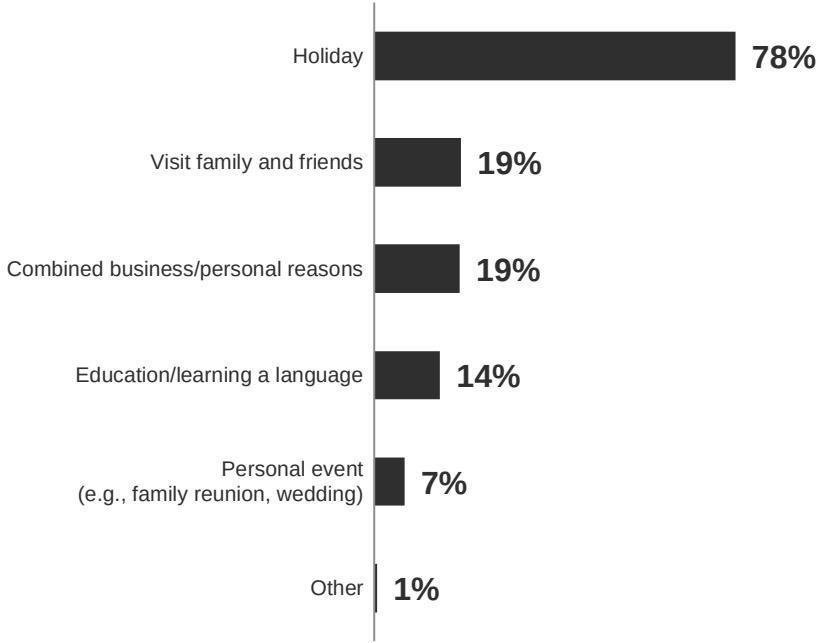
+ New statement in 2021 GTW – no trending.
Base: Long-haul pleasure travellers (past 3 years or next 2 years) considering Canada (n=365)
FT3. Which of the following would factor into your choice to travel to Canada? (Select all that apply)

/ Significantly higher/lower than 2020 GTW wave.

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.

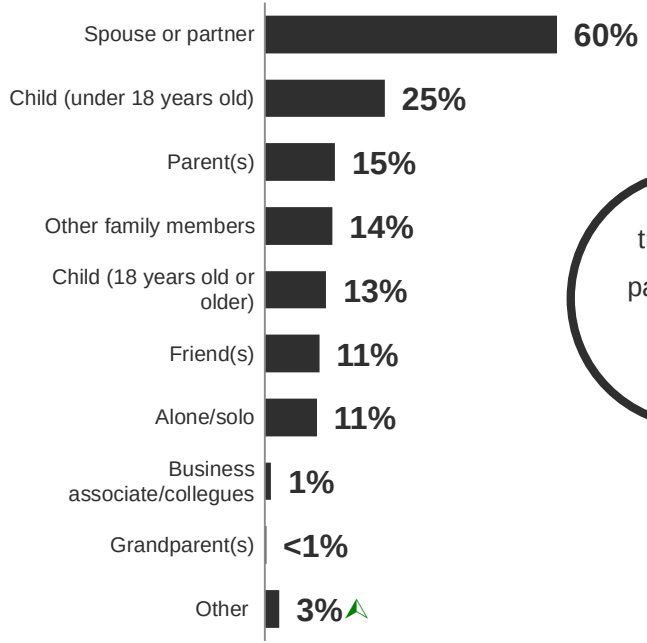
Purpose of Trip



▲/▼ 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?

Travel Party



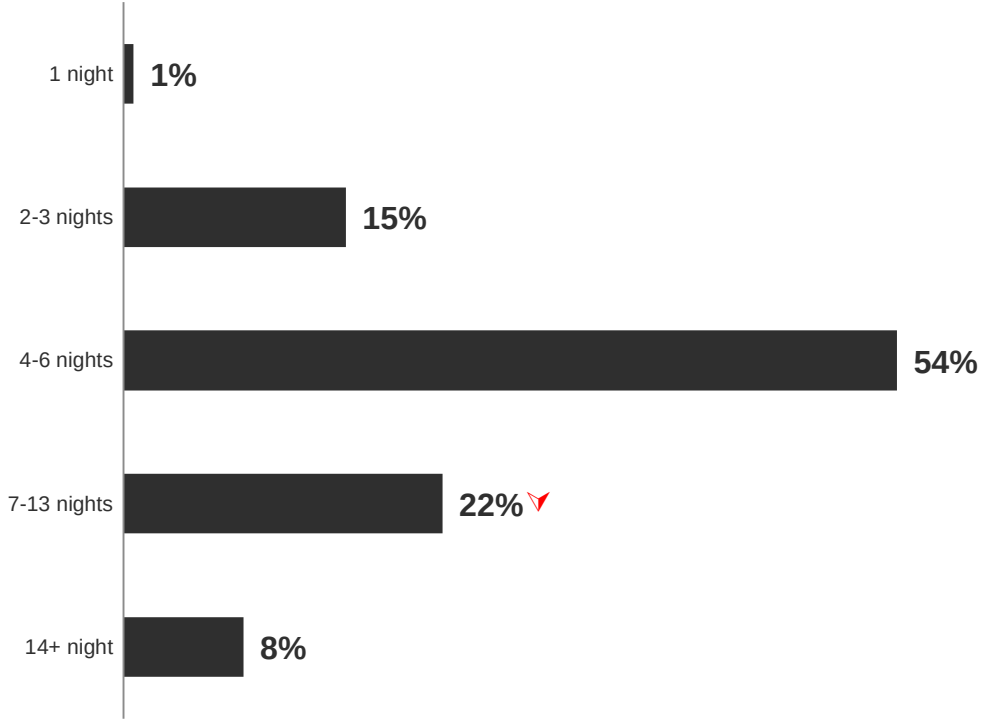
Would travel with spouse/ partner only **29%**

▲/▼ 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.

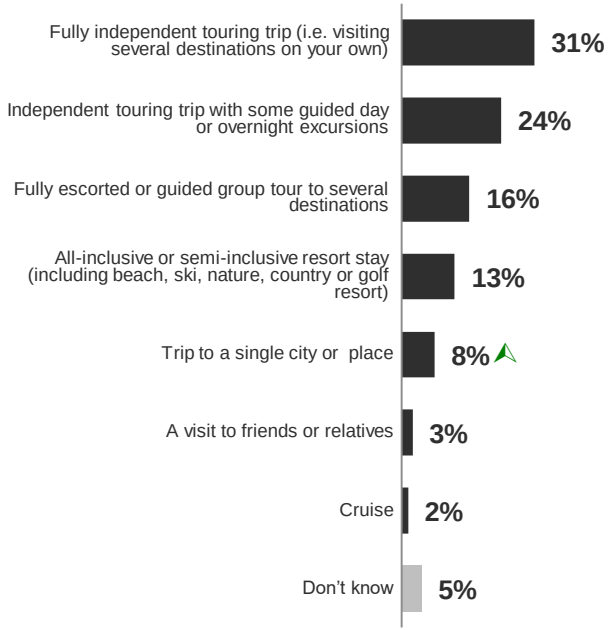


/ Significantly higher/lower than 2020 GTW wave.
Base: Long-haul pleasure travellers (past 3 years or next 2 years) considering Canada (n=365)
FT4. How many nights do you think you would spend on a trip to [destination]?

Trip Type and Accommodation for Future Trip

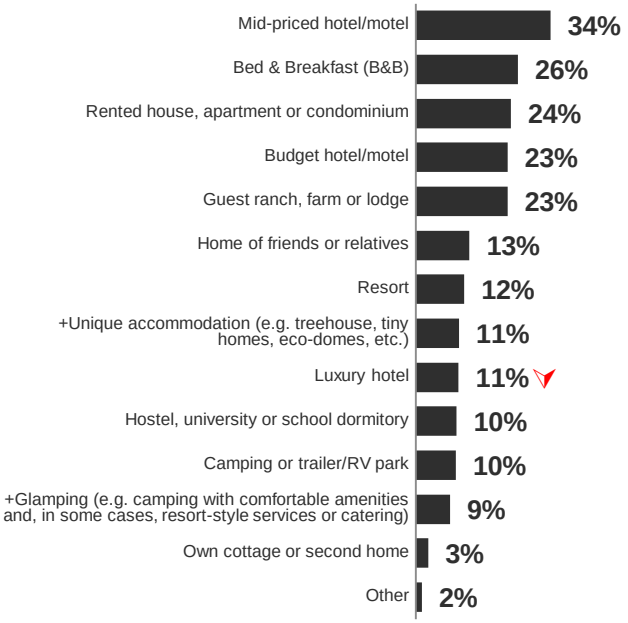
- Most Mexican travellers would prefer to travel independently on a trip to Canada, either with or without the addition of some guided excursions as part of the trip.
- Mid-priced hotels continue to stand out as the most preferred type of accommodation for a trip to Canada, while mentions of luxury hotels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

Trip Type



▲ / ▼ 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)

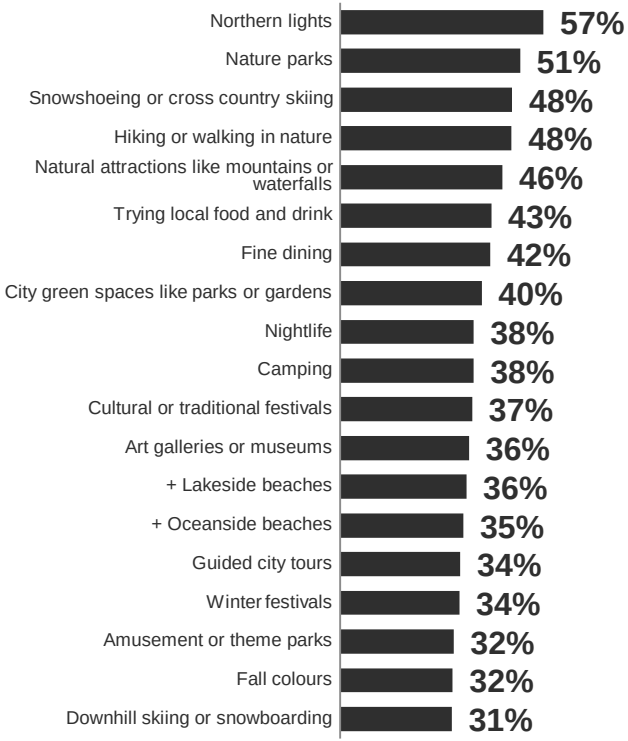
Type of Accommodation

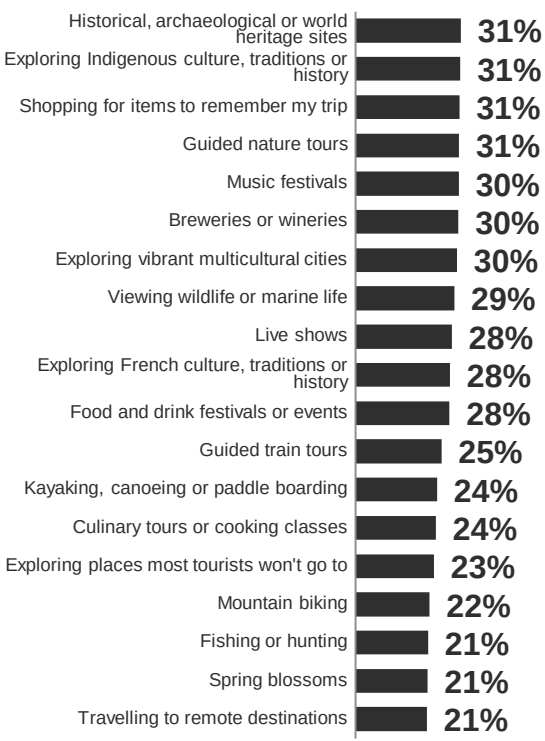


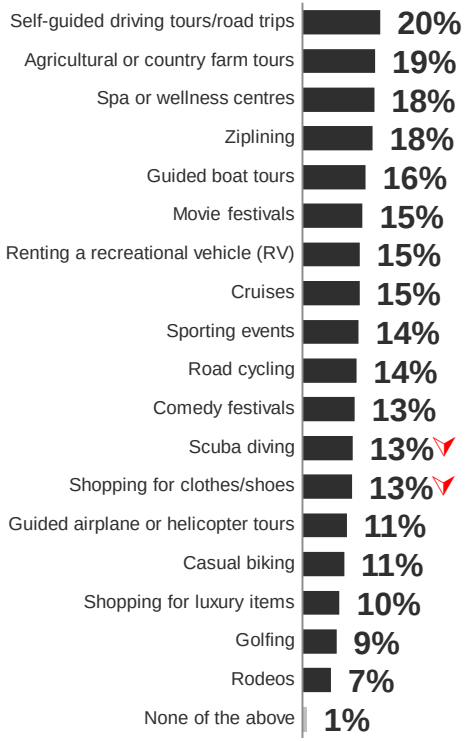
▲ / ▼ Significantly higher/lower than 2020 GTW wave.
+ New statement in 2021 GTW – no trending.
Base: Long-haul pleasure travellers (past 3 years or next 2 years) considering Canada (n=365)
FT10. Which types of accommodation would you consider staying at during a trip to Canada? (Select all that apply)

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.





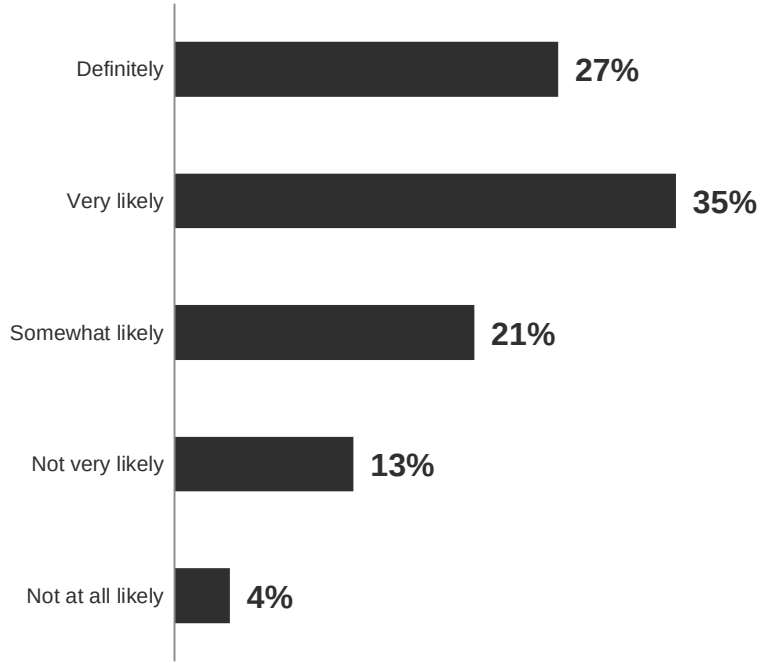


+ New statement in 2021 GTW – no trending.
Base: Long-haul pleasure travellers (past 3 years or next 2 years) considering Canada (n=365)
FT11. What activities would you be interested in participating in during a trip to Canada? (Select all that apply)

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

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.



Definitely/ Very Likely/ Somewhat Likely

83%

/ 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]?