



# 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<sup>1</sup>

**359K (↑47%)**



Average Trip Spend<sup>2</sup>

**\$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.

## 2018 Forecast



Visitor Forecast<sup>2</sup>

**433K (↑19%)**



Spend Forecast<sup>2</sup>

**\$741M (↑22%)**



Airline Seat Capacity<sup>3</sup>

**↑37%**



Local Currency vs CAD<sup>4</sup>

**↑2.7%**

## Market Insights



Pleasure and recreation travel to Canada grew more than any other trip purpose, up an estimated 114% over 2016.<sup>2</sup>



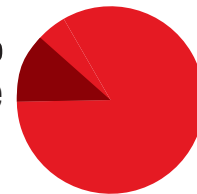
In 2017, Canada was ranked 3rd behind the US and Spain among countries Mexican travellers were considering visiting in the next 2 years.<sup>5</sup>



Three-quarters of recent Mexican visitors to Canada mentioned consulting a travel agent for their trip, either for research or booking.<sup>5</sup>

## Channel Investment Mix

**16%**  
Travel Trade



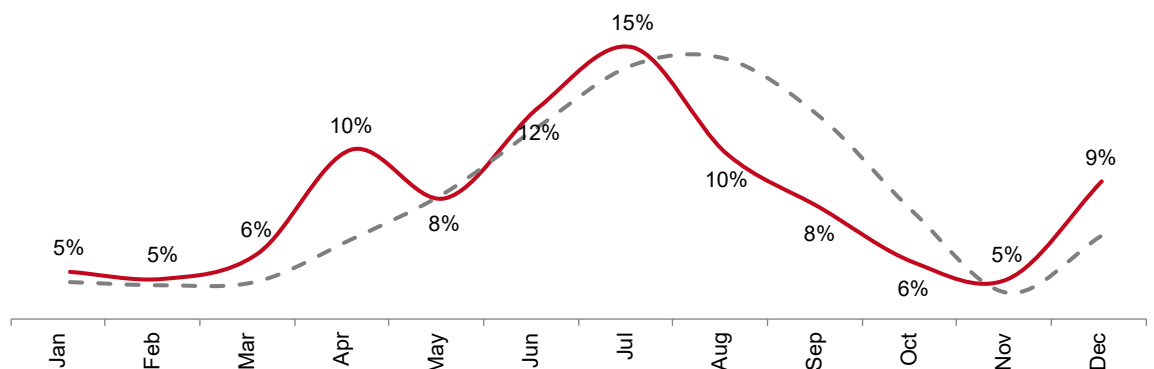
**84%**  
Consumer Direct  
& Earned Media

## Travel Seasons<sup>1</sup>

### % of arrivals to Canada by month

— Mexico

- - Destination Canada Market Average



## Market Potential<sup>5</sup>



**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<sup>5</sup>

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 elevate 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.

Canada

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<sup>1</sup> Statistics Canada, Frontier Counts, 2017

<sup>2</sup> Destination Canada Research estimates, using Statistics Canada preliminary Q1-Q3 ITS, Frontier Counts and e311 adjusted data (April 2018)

<sup>3</sup> IATA SRS Analyzer Data, March 2018

<sup>4</sup> Tourism Economics, March 2018

<sup>5</sup> Global Tourism Watch 2017