

# Global Market Profile

MEXICO



March 2024

# Introduction

- Tourism Economics forecasts domestic leisure visitation will account for \$101B in spending in California in 2024 and international visitation will account for \$29B in spending in the state.
- In this highly competitive environment for tourism dollars and with travel demand normalizing, effective global marketing is critical to California achieving these spending numbers which requires a deep knowledge of the domestic and international markets that drive tourism spending in the state. This includes an understanding of the audience of travelers most likely to visit California in the next year.
- The **Global Market Profile** report has been developed by Visit California Research to provide the organization and the state's tourism industry with insights on California's domestic market and thirteen opportunity international markets through detailed market landscapes as well as highly targeted audience profiles and traveler behavior insights.

# Market Landscape:



# Audience Insights:



# California Traveler & Trip Details:

- **Market Landscape** includes foundational intelligence from Visit California:
  - Visitation and Spending Forecasts
  - Airlift Recovery (flights and seats)
  - Arrival Numbers & California Market Share
  - Consumer travel intent and barriers
- **Audience Insights** includes a profile of target travelers, including:
  - Description and size of Audience Target
  - Demographic profile
  - General travel planning behavior
  - General trip spending
  - Advertising and sports preferences
- **California Traveler & Trip Details** includes details about visitors to California from the past year, including:
  - Trip purpose
  - First/Repeat visitation
  - Destinations visited
  - Travel party, accommodations, activities and expenditures

# Methodology & Sources

- The report contains three sections:
  - The **Market Landscape** section is sourced from Visit California's key research partners, including Tourism Economics, NTTO, CIC Research, Cirium and YouGov.
  - The **Audience Insights** section is sourced from YouGov's Global Travel Profiles which tracks travel-related sentiment and behavior in over 25 global markets, including all thirteen Visit California opportunity markets. Panelists are surveyed on preferred trip types, booking methods, accommodation preferences, and advertising perceptions.
    - The audience profile is built on a segmentation of consumers planning international leisure travel in the next 12 months and are considering California as a destination.\* The profiles provide insights into those travelers most likely to visit the state.
  - The **California Traveler and Trip Characteristic** section provides information on trips that included a stay in California from the Survey of International Air Travelers (SIAT).

\*Profile targets for China and Japan include travelers considering California and/or other U.S. destinations due to sample size limitations.



# Market Landscape

# Country Profile

## Mexico



**POPULATION: \***

**128.5M**

**EXCHANGE RATE: \*\***

Local currency to USD dollar

**17.1**

**GROSS DOMESTIC PRODUCT (GDP):**

Annual % chg \*\*\*

**1.8%**

**INFLATION RATE:**

Annual % chg \*\*\*\*

**6.3%**

\* [www.worldometers.info](http://www.worldometers.info), 2023

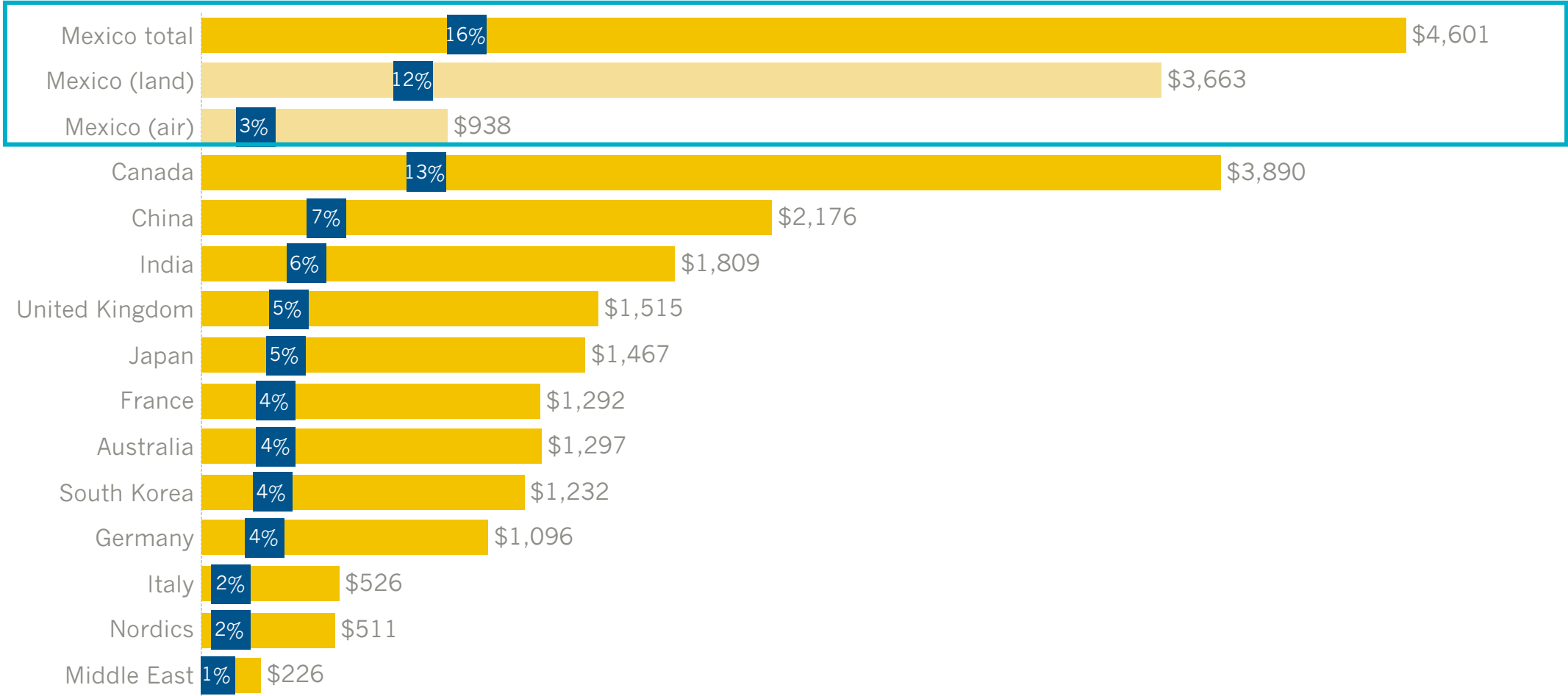
\*\* [www.x-rates.com](http://www.x-rates.com), Feb 2024

\*\*\* [www.imf.org](http://www.imf.org), 2023

\*\*\*\* [www.imf.org](http://www.imf.org), 2023

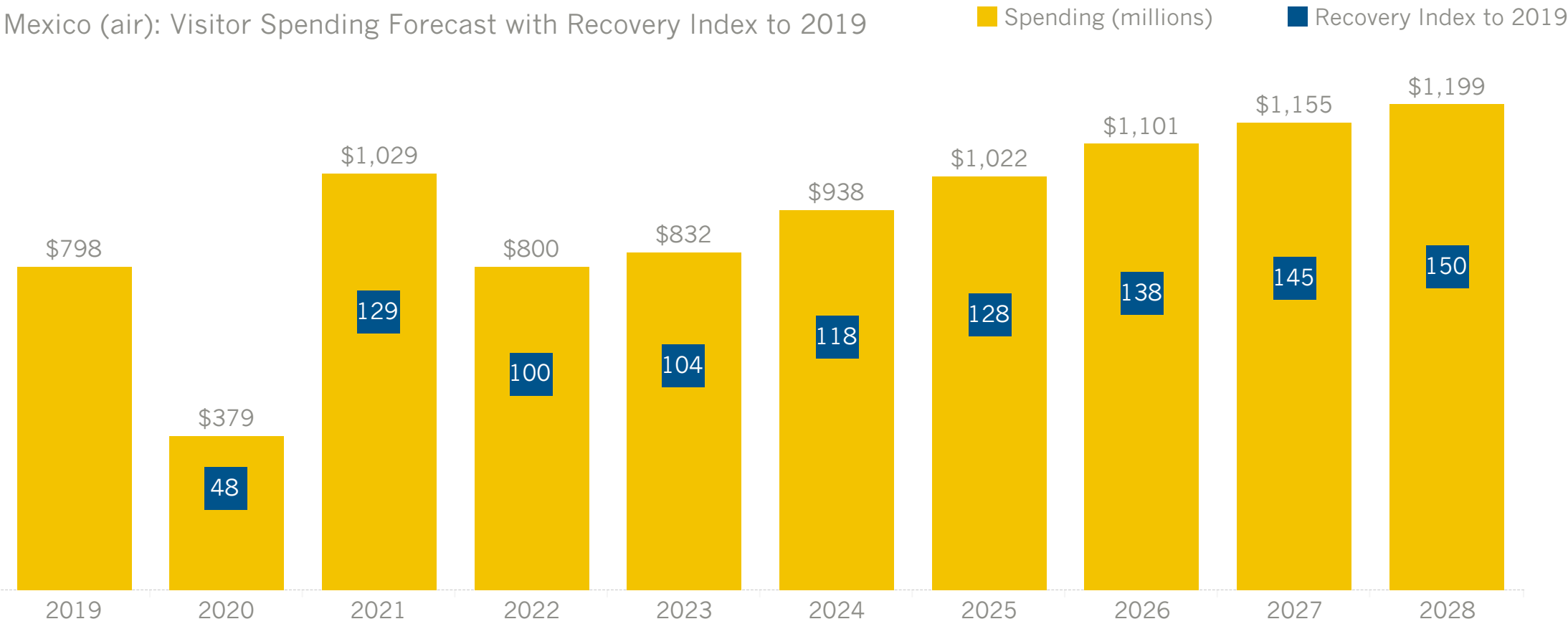
# Forecast: Visitor Spending by Market (2024)

The chart below shows California’s visitor spending forecast for the state’s 14 target markets and share of total international spending in the state.



# Forecast: Visitor Spending

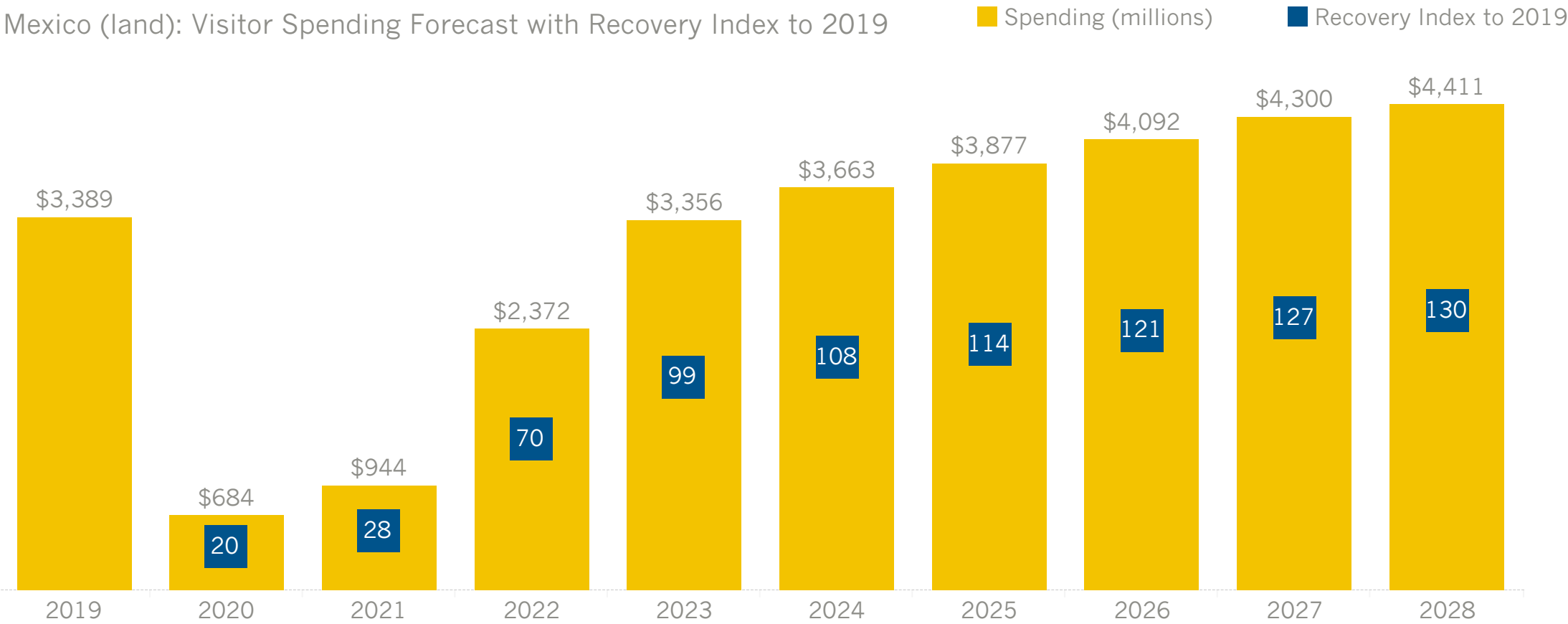
The chart below shows the state’s visitor spending forecast and the recovery index for the focus market.





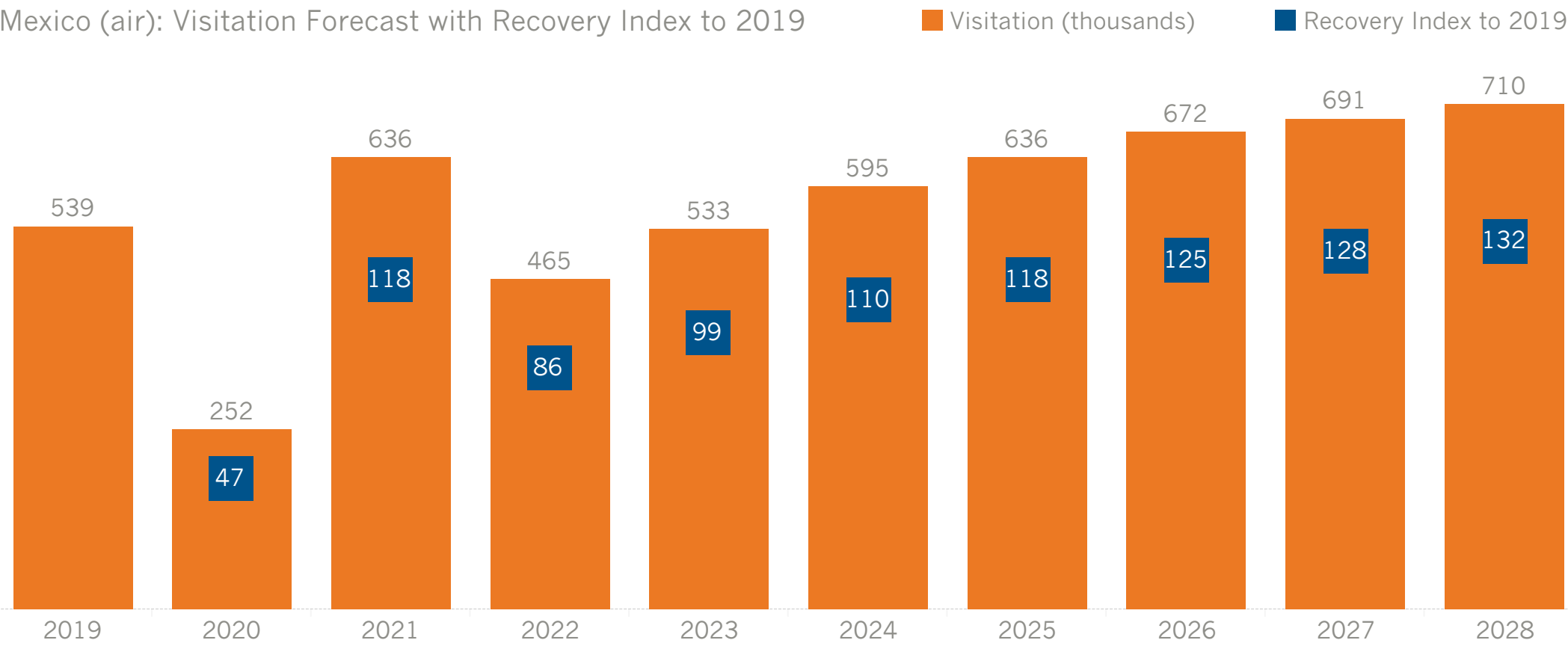
# Forecast: Visitor Spending

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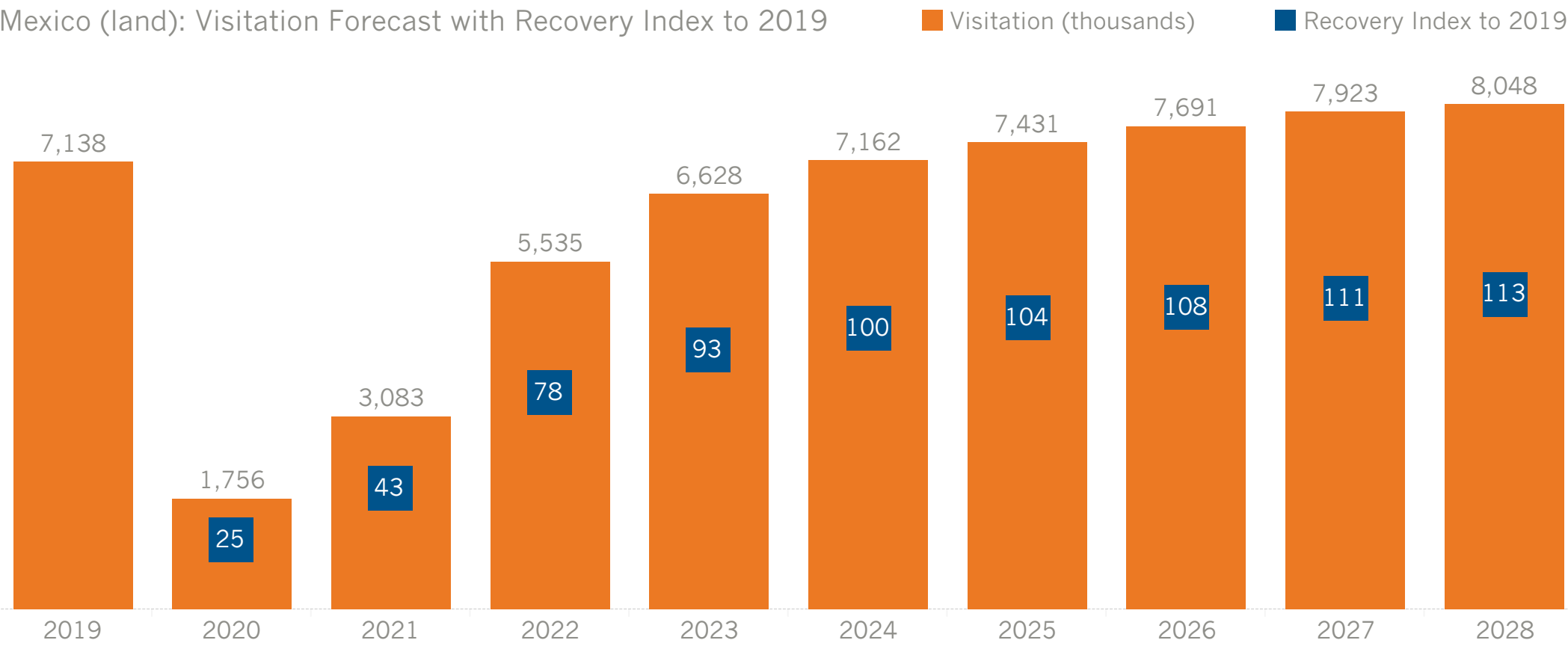
# Forecast: Visitor Volume

The chart below shows the state’s visitation forecast and recovery index for the focus market.



# Forecast: Visitor Volume

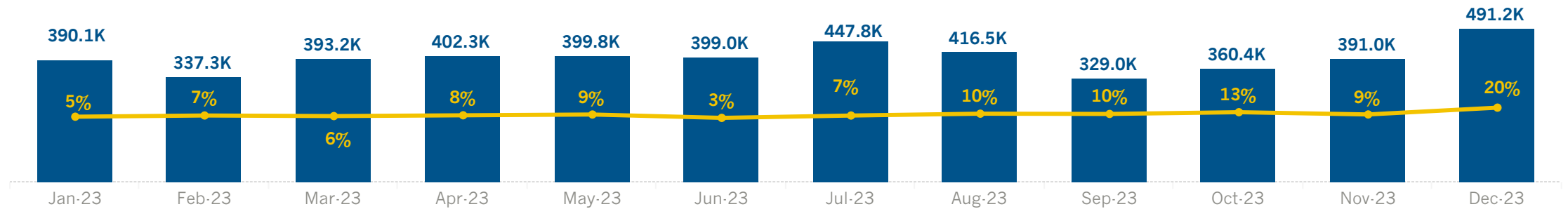
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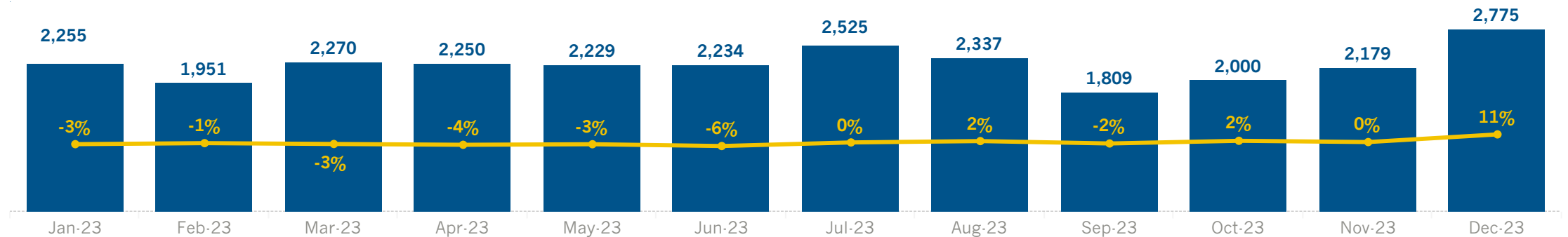
# Airlift to California

The charts below shows airlift to California and percent change to 2019 for the focus market.

Mexico: Non-Stop Seats to CA (% chg vs 2019)



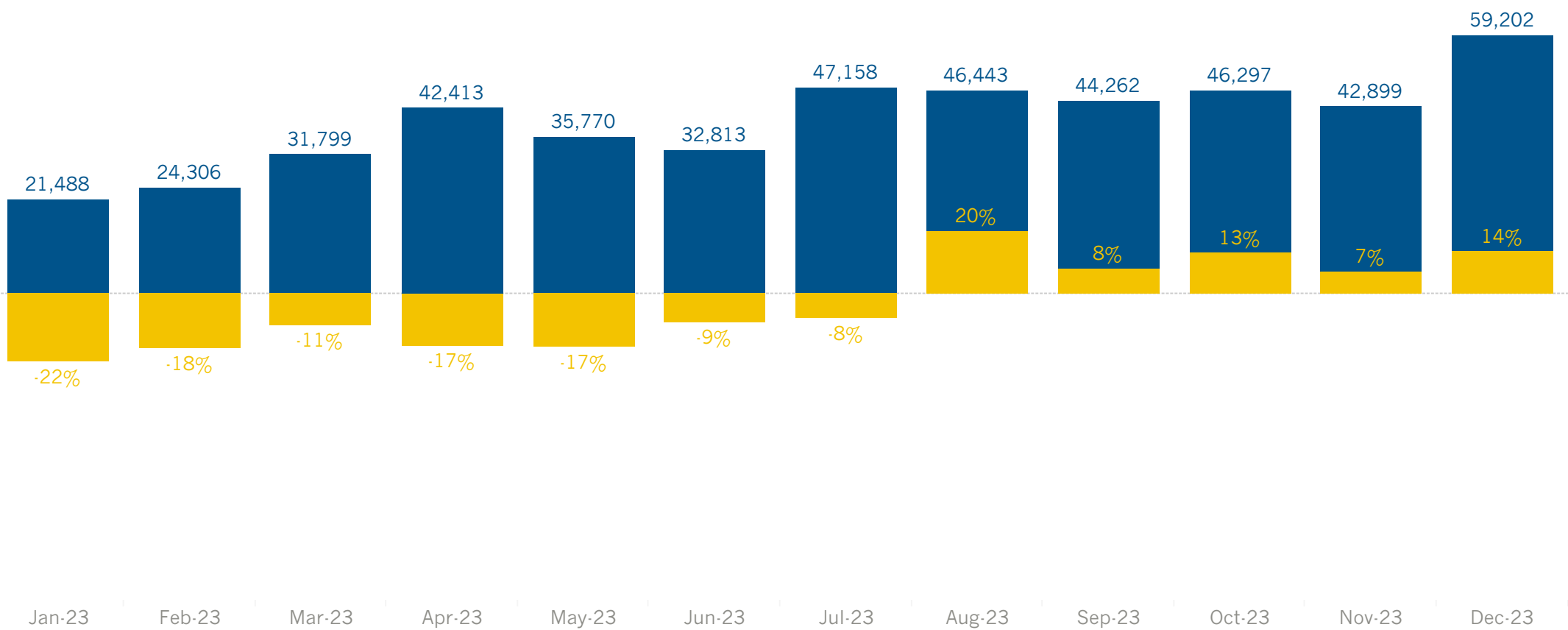
Mexico: Non-Stop Flights to CA (% chg vs 2019)



# Non-Resident Arrivals to California

The chart below shows non-resident arrivals at California’s ports of entry and percent change to 2019 for the focus market.

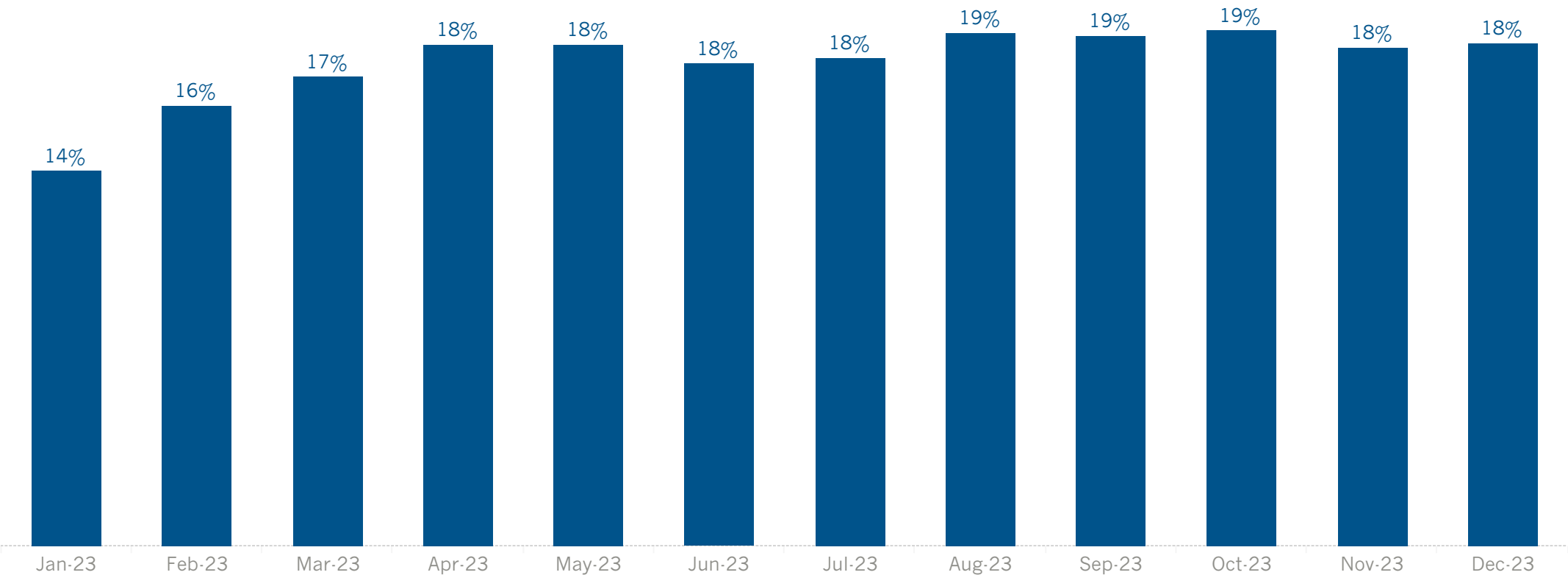
Mexico Air Only: Non-Resident Arrivals at CA Ports of Entry (% change vs. 2019)



# California's Share of Arrivals

The chart below shows California's share of arrivals from the focus market based on First Intended Address (FIA).

Mexico: California Market Share of Arrivals Based on First Intended Address (%)



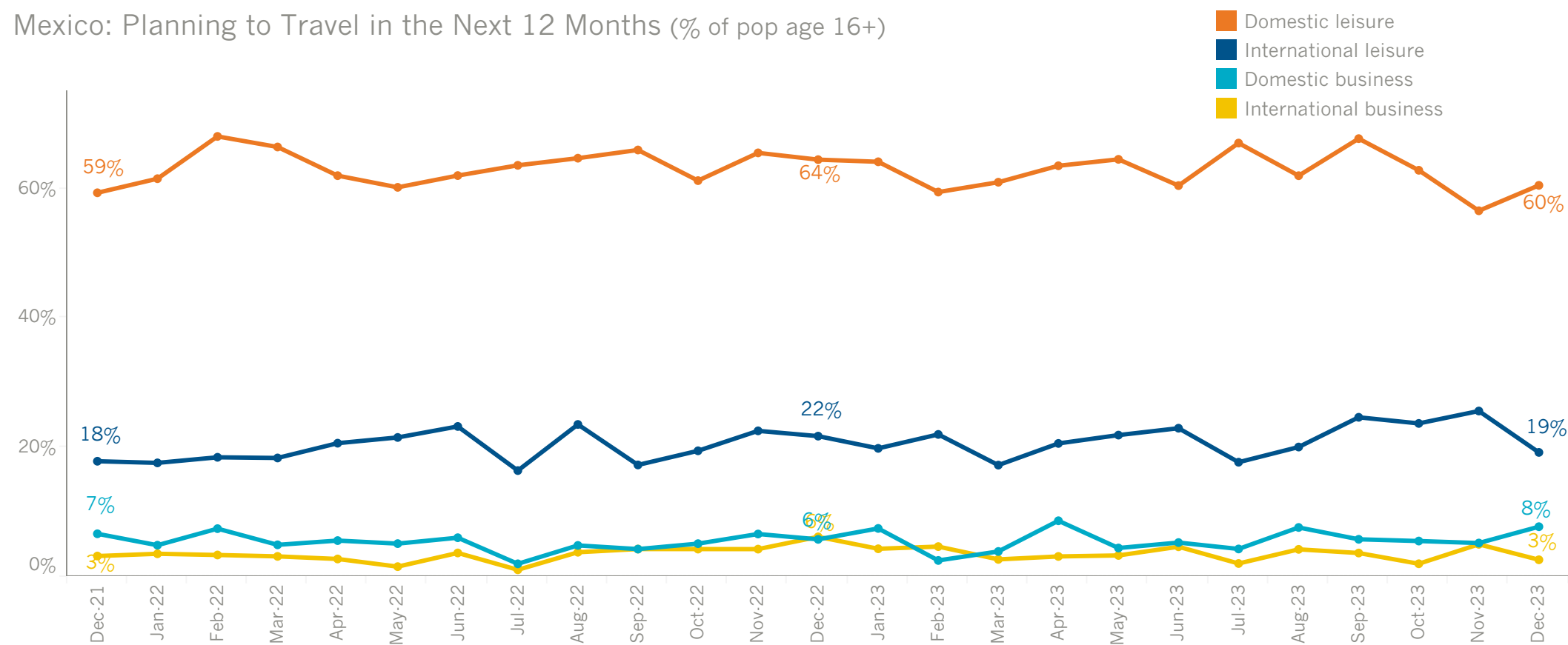
Data reported through: December 2023

Source: NTT/CIC Research

# Travel Planned in Next 12 Months

The chart below shows the types of trips planned in the next 12 months for the focus market.

Mexico: Planning to Travel in the Next 12 Months (% of pop age 16+)



Q: Which, if any, of the following trips are you planning to take in the next 12 months?

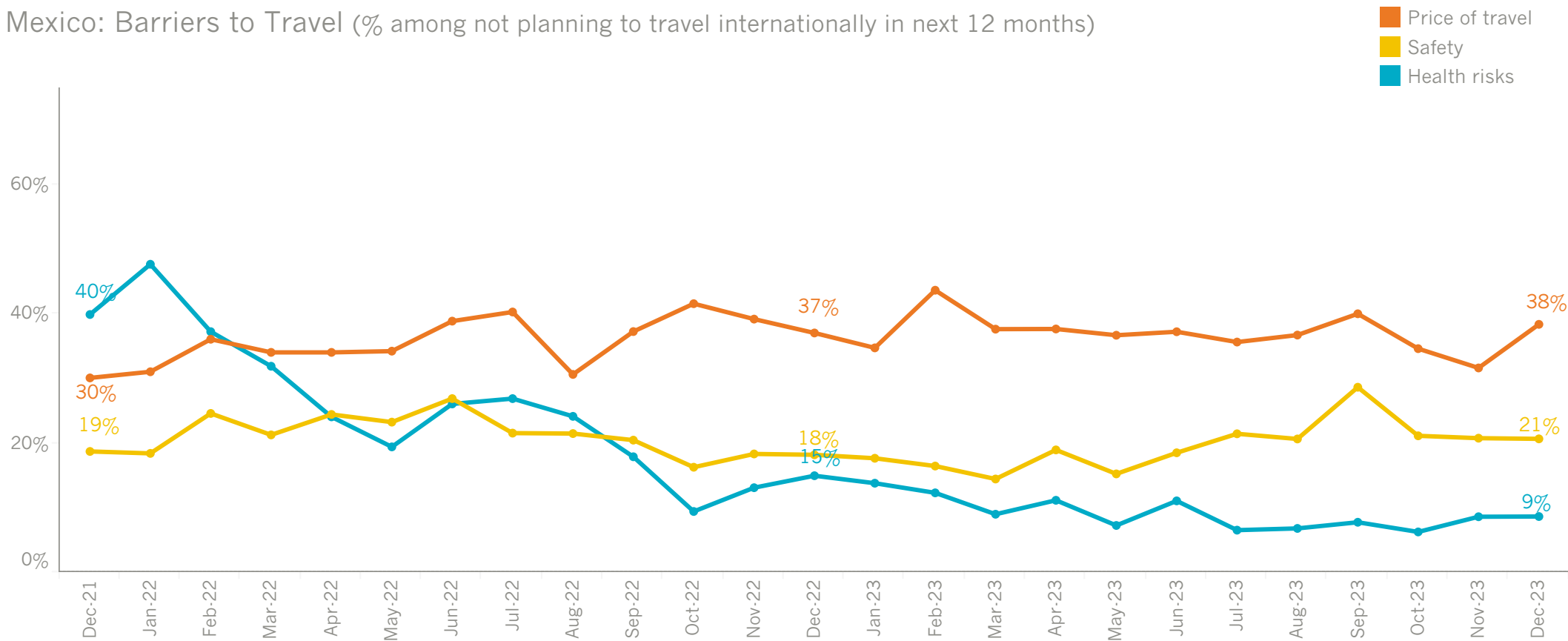
Data reported through: December 2023

Source: YouGov

# Barriers to Travel

The chart below shows perceived barriers to travel among consumers not currently planning an international trip in the focus market.

Mexico: Barriers to Travel (% among not planning to travel internationally in next 12 months)



Q: Which, if any, of the below factors are currently preventing you from traveling?

Data reported through: December 2023

Source: YouGov





# Audience Insights



Int'l leisure travelers  
considering California  
"CA Traveler Target"

# Audience Profile

The chart shows the incidence of international leisure travelers in the focus market and the subset of international leisure travelers considering California as a destination.

The following audience profile is based on the survey responses over a 12-month period of those consumers considering California as a destination for international leisure travel.

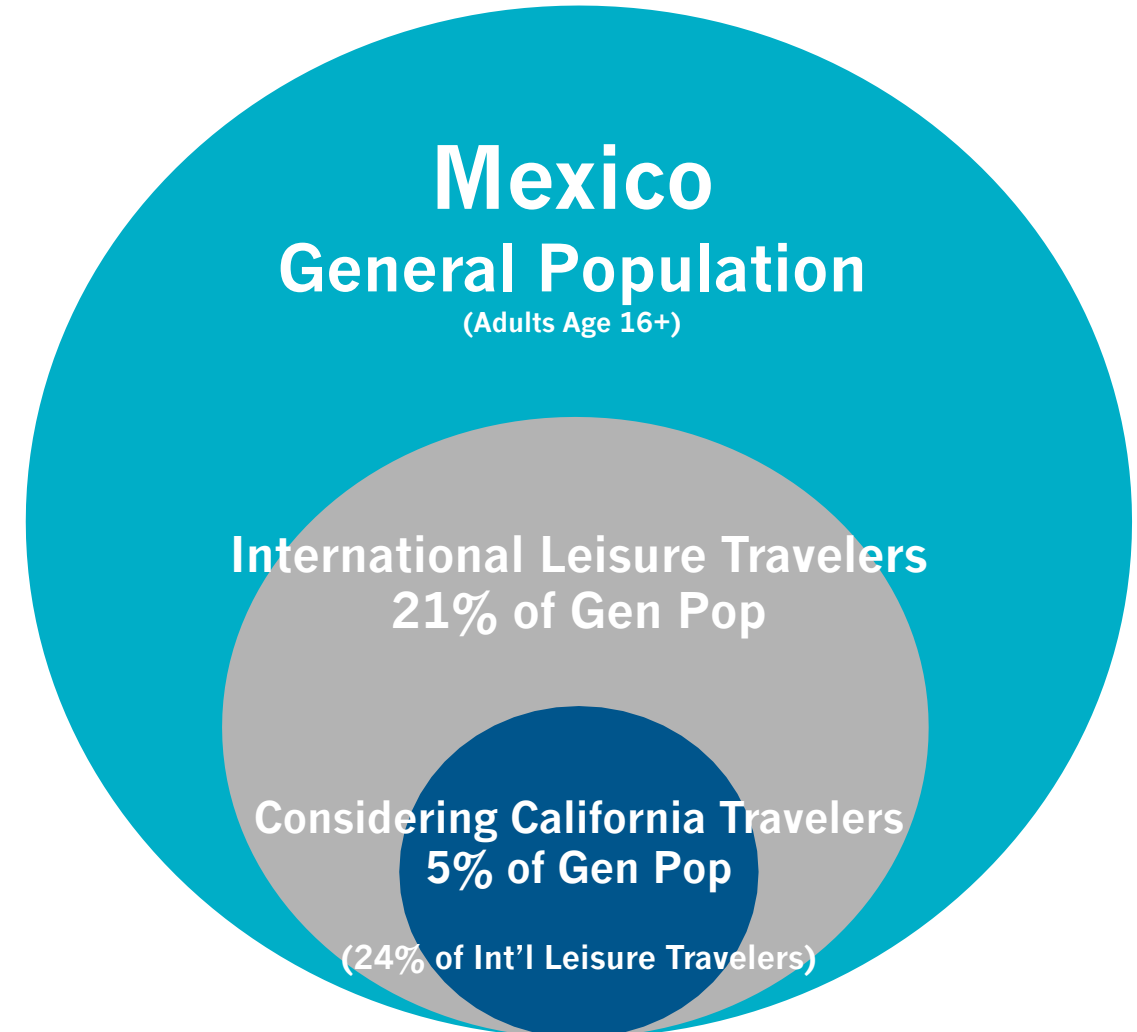
## Definitions:

### International Leisure Travelers:

Consumers in the focus market planning an international leisure trip in the next 12 months.

### Considering California Travelers ("CA Traveler Target"):

Among the consumers in the focus market planning international leisure travel, those who are considering California as destination for travel in the next 12 months.



# How to Read the Data

Generation		
	CA Traveler Target	Index
Gen Z	5%	59
Millennial	51%	115
Gen X	29%	124
Baby Boomer	13%	60

#### Generation Definitions:

- Gen Z (2000 and later)
- Millennial (1982-1999)
- Gen X (1965-1981)
- Boomer (1946-1964)

#### Data:

- **CA Traveler Target:** Shows the incidence (%) of the demographic characteristic or travel activity among international leisure travelers considering California as a destination in the focus market.
- **Index:** Compares the incidence (%) of the CA Traveler Target to the incidence (%) of all International Leisure Travelers. For example, an index of 115 indicates that the measure among the CA Traveler Target is 1.15x greater than among International Leisure Travelers in the focus market.



Int'l leisure travelers  
considering California  
"CA Traveler Target"

# Demographic Profile

The chart below shows the demographic profile of the consumer target in the focus market.

## Mexico

### Gender

	CA Traveler Target	Index
Female	47%	94
Male	53%	106

### Marital Status

	CA Traveler Target	Index
Married	60%	108
Single	32%	98

### Family Status

	CA Traveler Target	Index
Children <18	25%	154

### Age

	CA Traveler Target	Index
Age 16-24	10%	83
Age 25-34	27%	110
Age 35-44	23%	115
Age 45-54	17%	98
Age 55+	22%	88

### Generation

	CA Traveler Target	Index
Gen Z	7%	71
Millennial	46%	107
Gen X	36%	113
Baby Boomer	11%	68

### Income\*

	CA Traveler Target	Index
Higher income	17%	128
Middle income	21%	124
Lower income	47%	91
Prefer not to say	15%	83

### Region

	CA Traveler Target	Index
North West	24%	177
Federal District	16%	107
West	12%	113
South Central	10%	68
East	9%	87
North East	8%	70
South West	7%	112
North Central	7%	86
South East	7%	69

\*Income definitions: Higher >200% of median, Middle 75% to 200% of median, Lower <75% of median



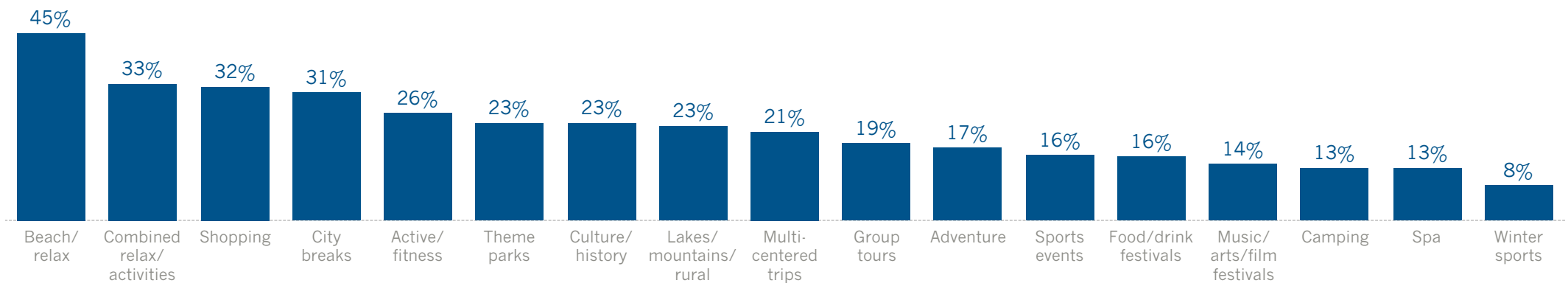
Int'l leisure travelers  
considering California  
"CA Traveler Target"

# Trip Preferences/Characteristics

The chart below shows the typical trip preferences & characteristics of the consumer target in the focus market.

## Mexico

### Trip Type



### Traveler Type

	CA Traveler Target	Index
Budget	44%	99
Responsible	19%	104
Luxury	15%	152
All-inclusive	9%	85
Adventurous	4%	71

### Travel Party (from most recent vacation)

	CA Traveler Target	Index
My partner	69%	112
My children	52%	109
Other family	37%	124
Friend(s)	16%	87
Solo	3%	60
Other person(s)	2%	72

Q Trip Type: Which of the following types of holidays do you typically take?

Q Traveler Type: Which of the following best describes the type of traveler you are?

Q Travel Party: Thinking about your most recent holiday, which of the following best describes the group or individual you went on holiday with?

Source: YouGov (2023)



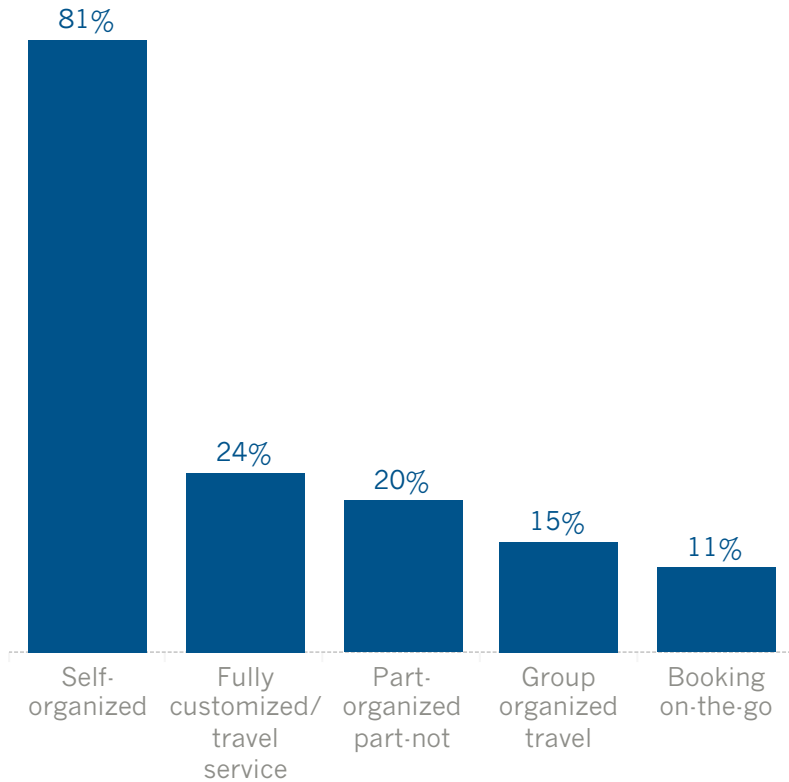
Int'l leisure travelers  
considering California  
"CA Traveler Target"

# Organizing/Planning Methods

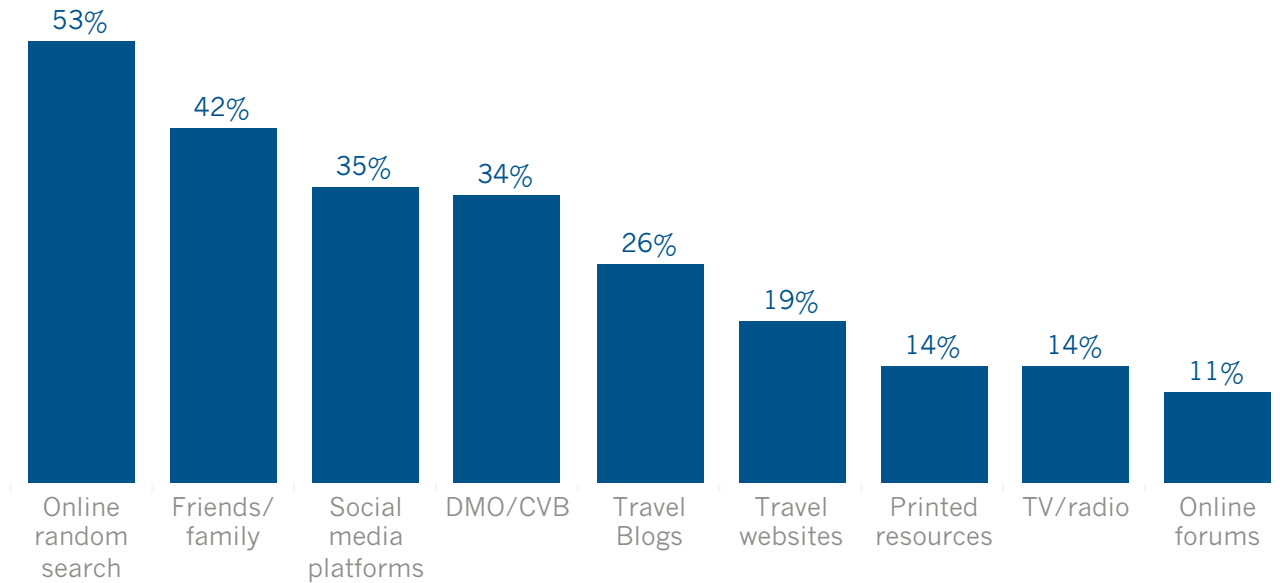
The chart below shows the organizing and planning methods of of the consumer target in the focus market.

## Mexico

### Organizing Travel



### Planning Methods



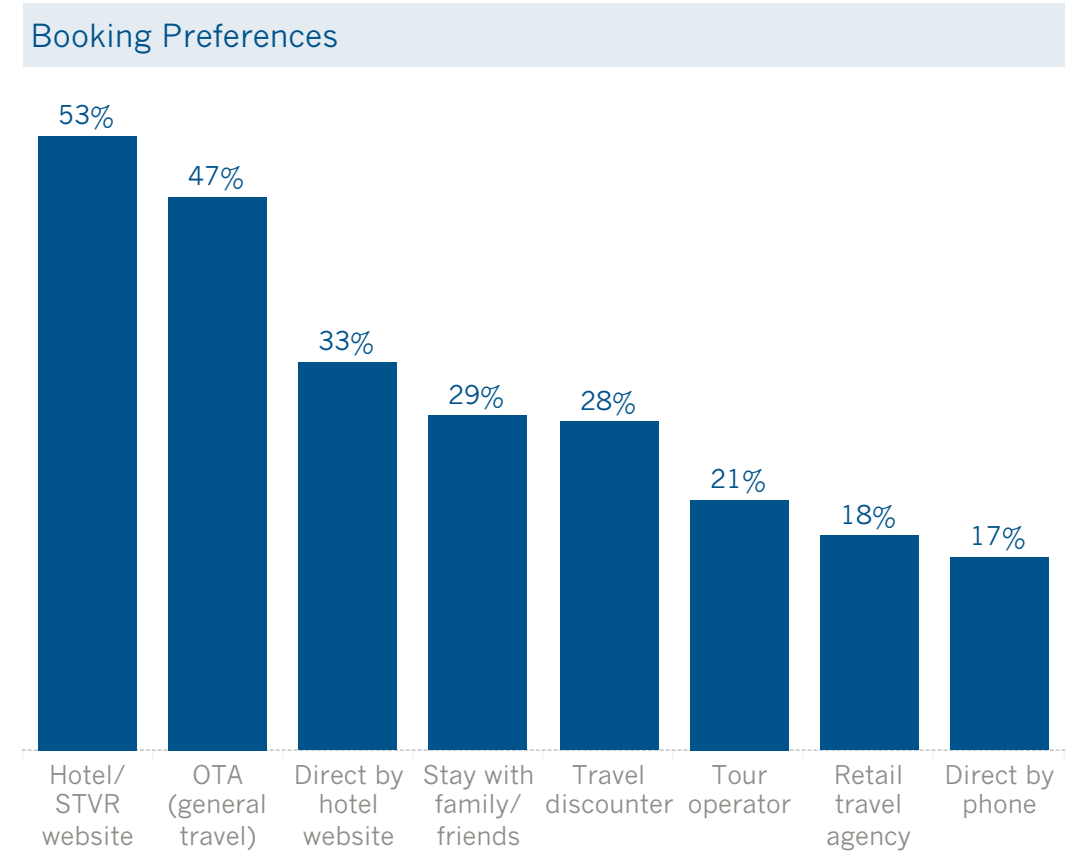
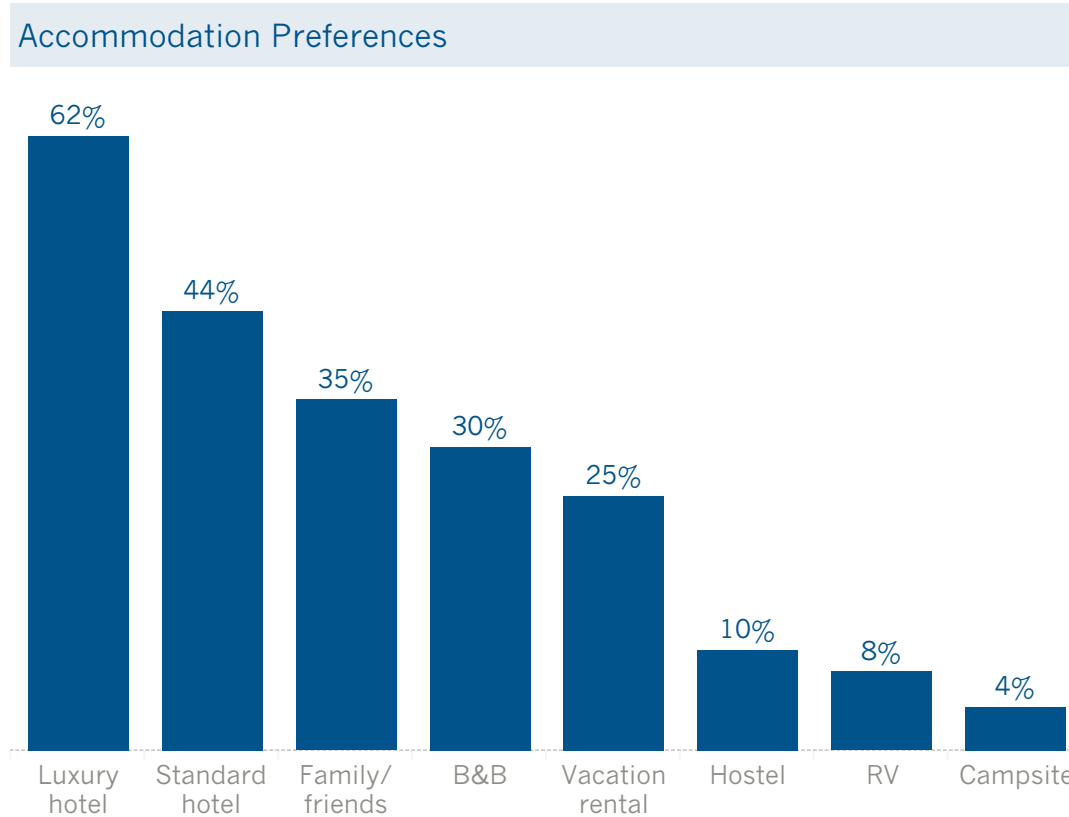


Int'l leisure travelers  
considering California  
"CA Traveler Target"

# Booking Preferences

The chart below shows the accommodation preferences of of the consumer target in the focus market.

Mexico





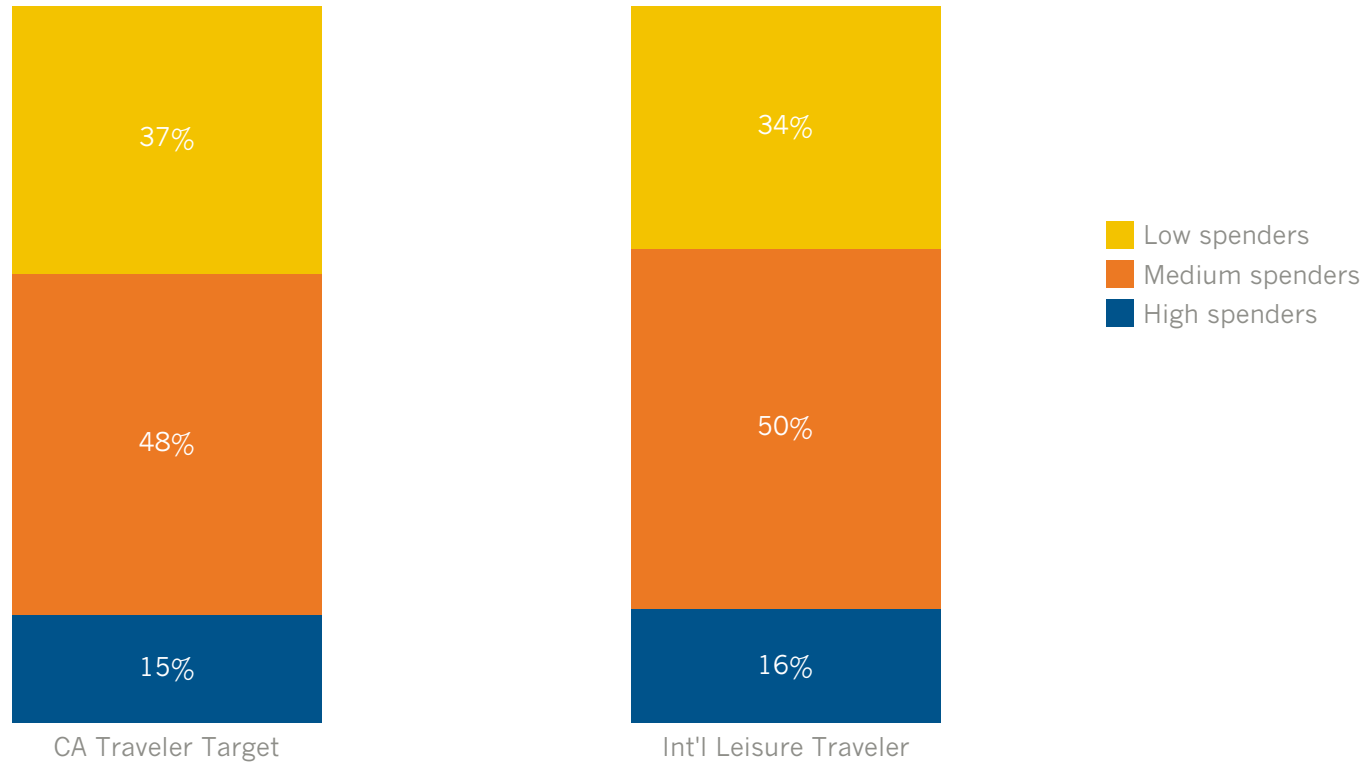
Int'l leisure travelers  
considering California  
"CA Traveler Target"

# Travel Spending

The chart shows the travel spending of the consumer target in the focus market based on the most recent vacation.

Mexico

Travel Spending (from most recent vacation)







Int'l leisure travelers  
considering California  
"CA Traveler Target"

# Media & Advertising

The data shows advertising influences and sports preferences of the target consumer in the focus market.

## Mexico

### Advertising Influences

	CA Traveler Target	Index
Social media	61%	112
Travel websites	39%	113
Billboards	36%	124
Direct mail	32%	169
Magazines (digital)	30%	113
TV - paid/subscription	25%	154
Online streaming services	25%	105
Podcast	24%	123
Magazines (physical)	19%	157
TV - Free to view channels	19%	125
Cinema	19%	105
Radio	17%	155
Local newspaper (physical)	15%	131
Local newspaper (digital)	13%	147
Public transport	12%	121
National newspaper (physical)	11%	166
National newspaper (digital)	10%	105

### Sports Watched/Followed

	CA Traveler Target	Index
NFL	44%	137
Soccer/Football	44%	126
Boxing	39%	126
Basketball	34%	146
Baseball	32%	137
Swimming	24%	107
Gymnastics	23%	112
Tennis	21%	130
Athletics/Track & Field	19%	148
Running/Marathon	16%	173
Cycling	15%	122
Golf	13%	209
Volleyball	12%	84
Horse Racing	7%	128
Ice Hockey	6%	122
Australian Rules Football	5%	134
Surfing	5%	120
Cricket	4%	190
Rugby League	3%	123

Q Advertising: Thinking about your next travel or holiday related purchase,...where would you advertise to catch your attention?

Q Sports: Which of the following sports do you watch or follow?

Source: YouGov (2023)

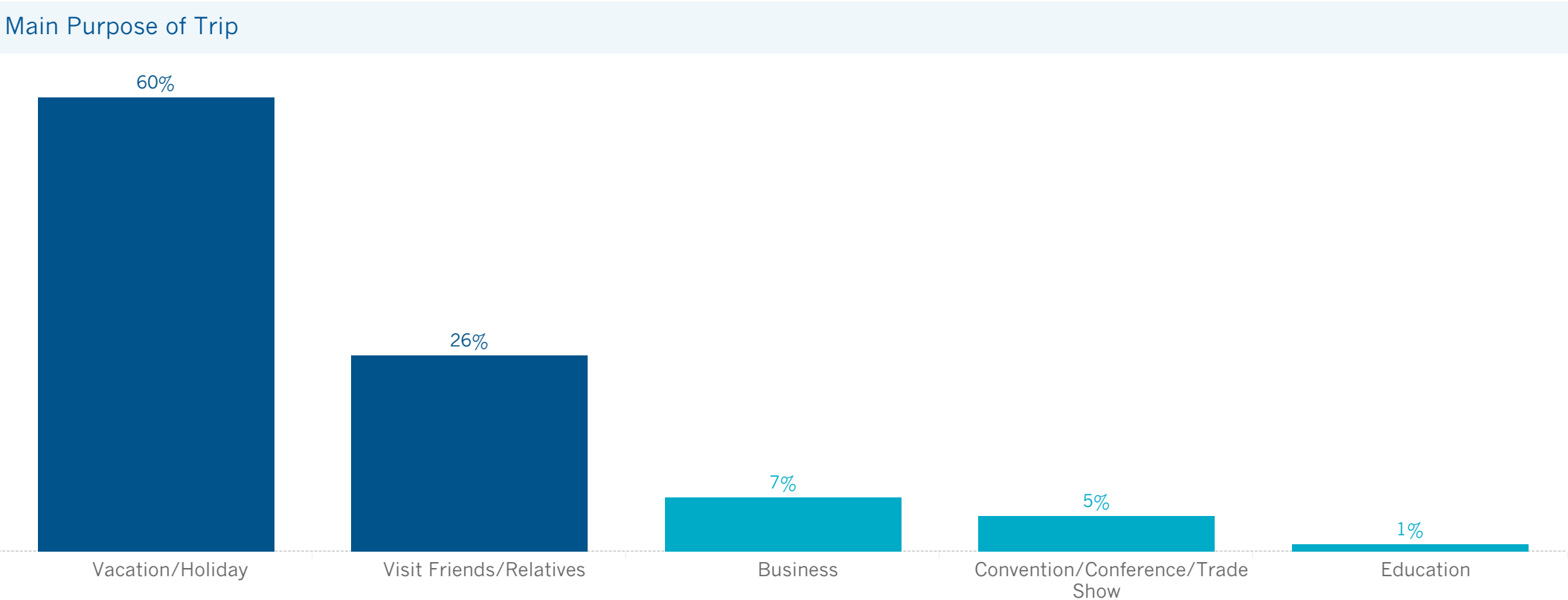


# **California Travelers & California Trip Characteristics**

# Main Purpose of Trip

The chart below shows the main purpose of the trip among travelers in the focus market.

Mexico Air



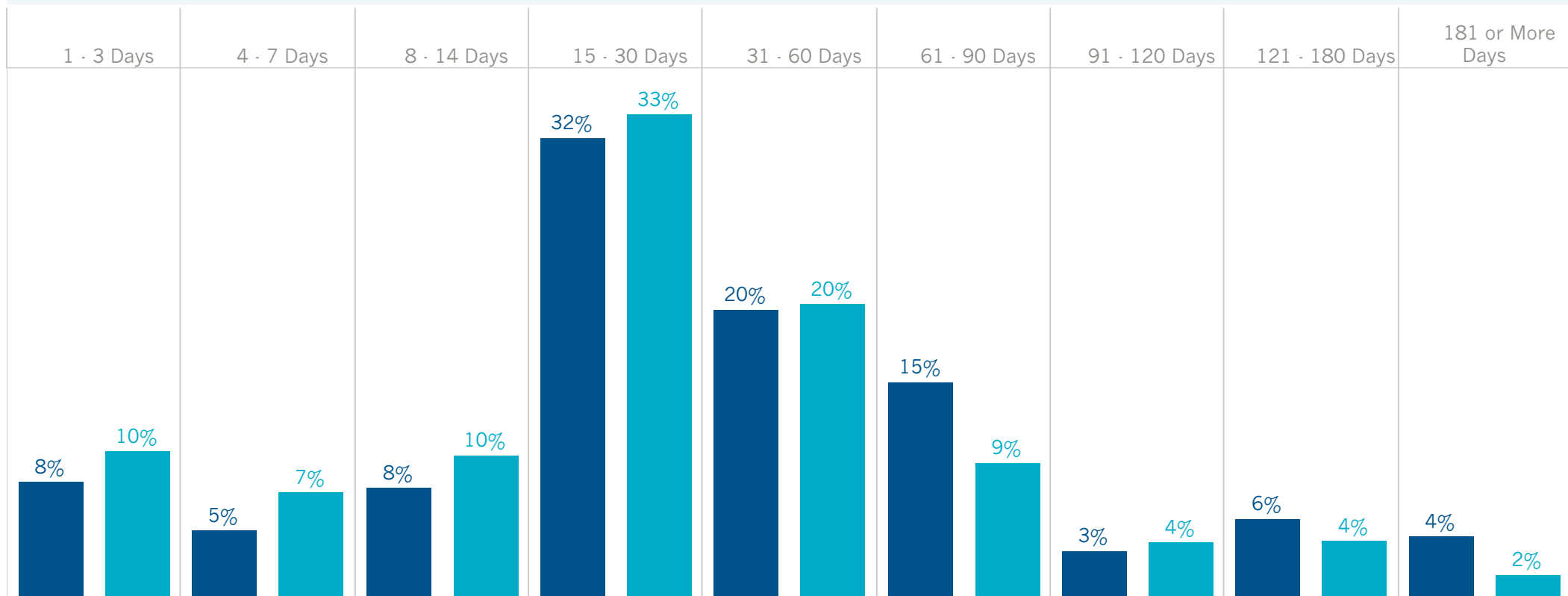


# Decision Making vs Reservations

The chart below shows the timeframe for making the decision to travel and making the reservations among travelers in the focus market..

## Mexico Air

Decision Making vs Reservations



- How many days prior to departure did you make the decision to travel?
- How many days prior to departure did you make air travel reservations?

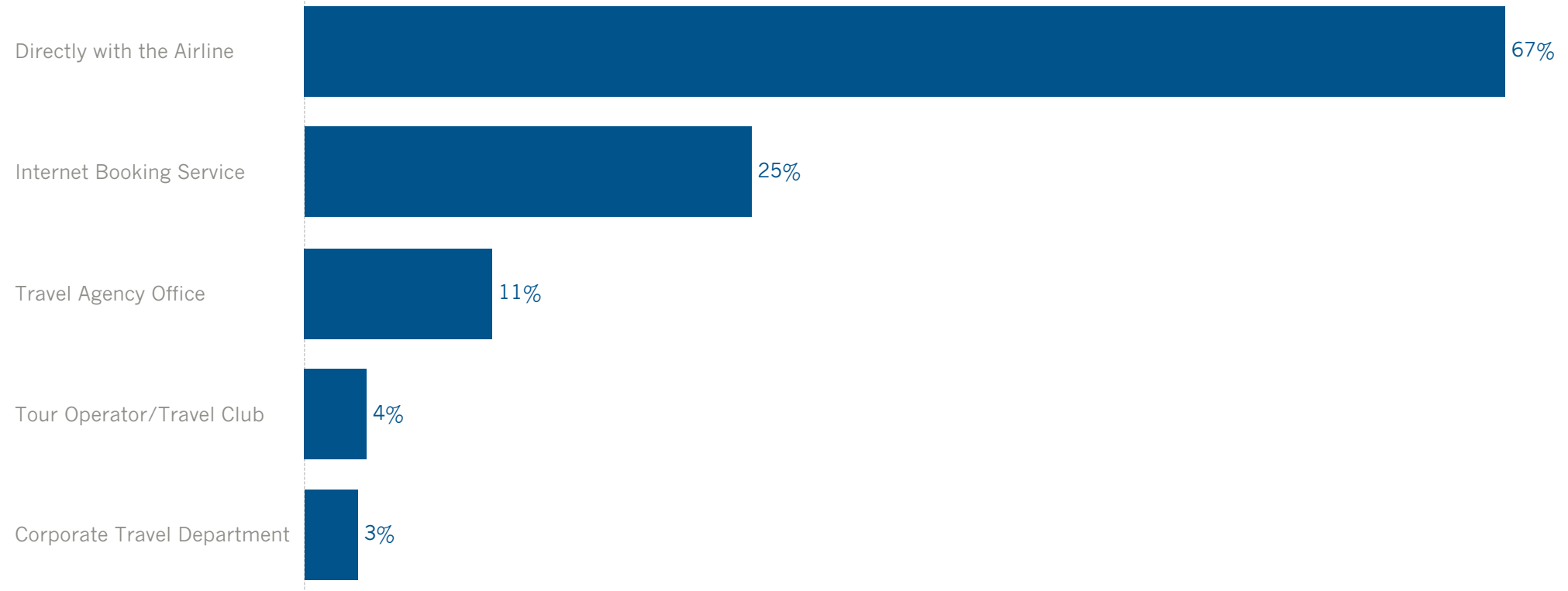


# Airline Reservations

The chart below shows how airline reservations were made for the trip among travelers in the focus market.

## Mexico Air

### Airline Reservations





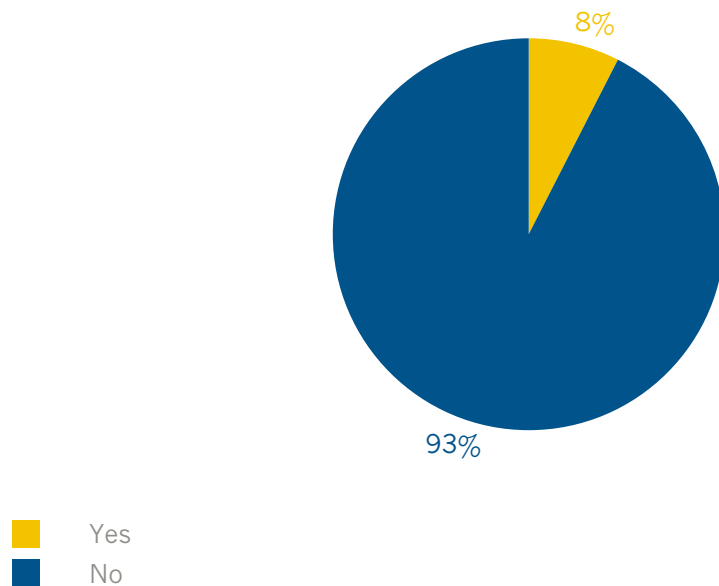
Leisure travelers

# First/Repeat Visitation, Travel Party Size

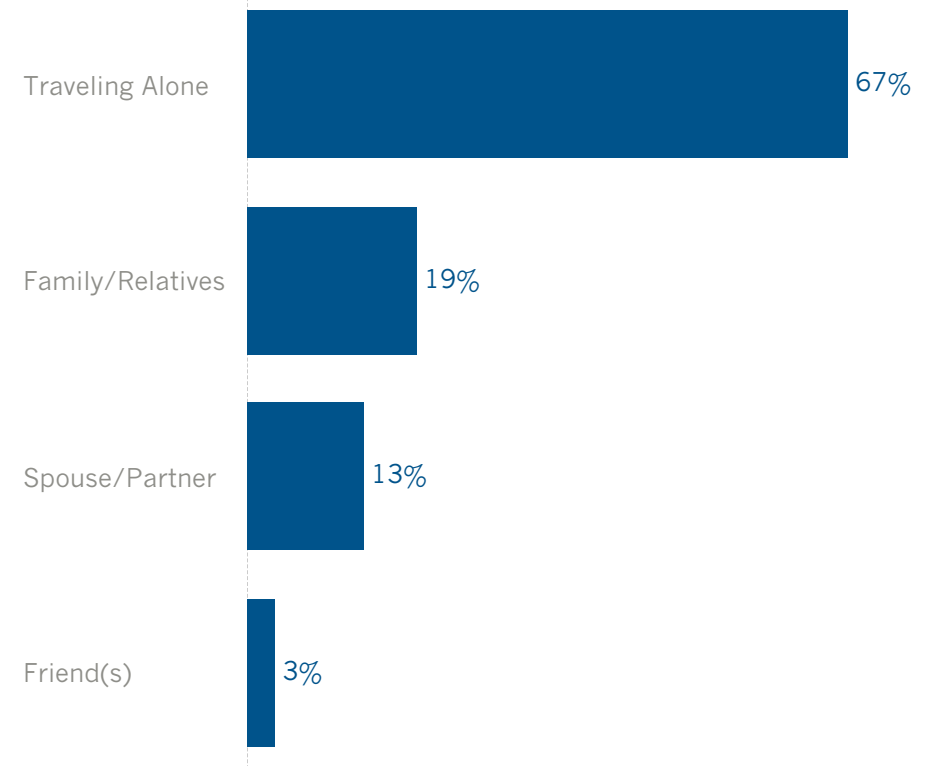
The charts below show first-time and repeat visitation and travel party size among travelers from the focus market.

## Mexico Air

### First trip to the US



### Travel Companion



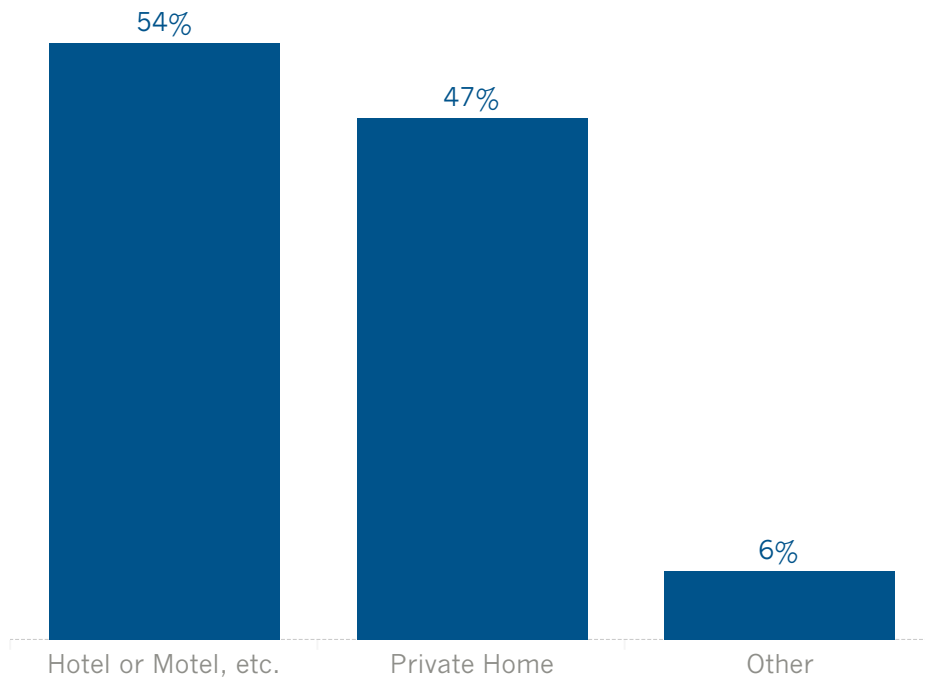


# Types of Accommodations & Nights

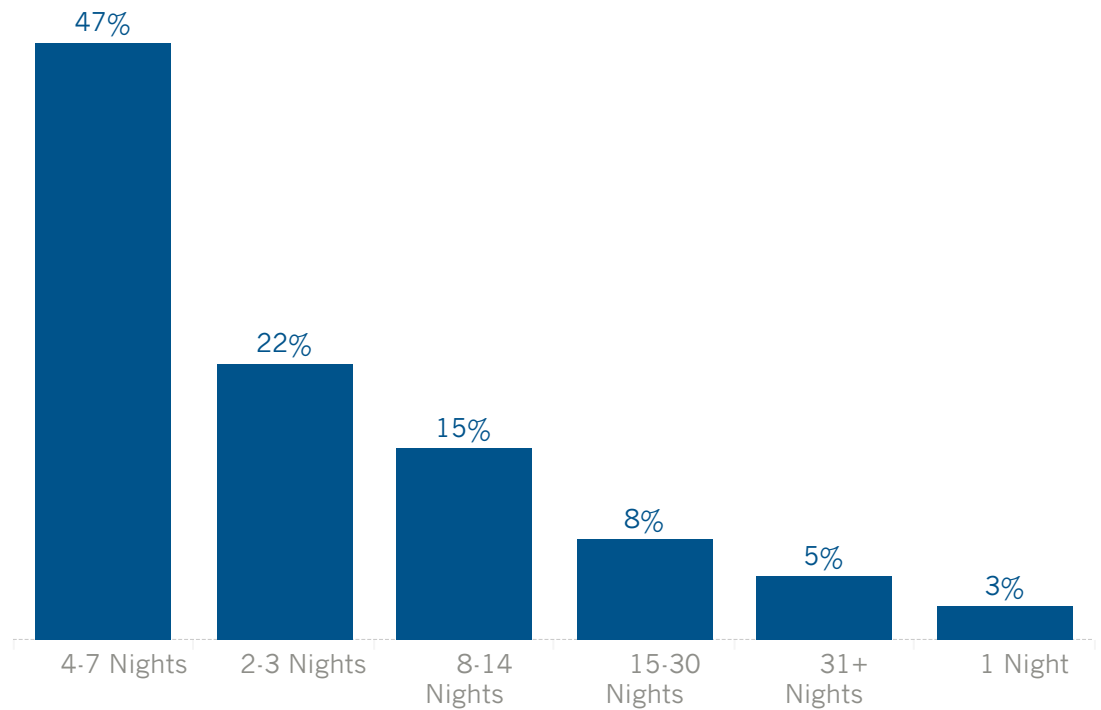
The charts below show types of accommodations stayed in and number of nights in destination among travelers from the focus market.

## Mexico Air

Types of Accommodations



Nights in Destination



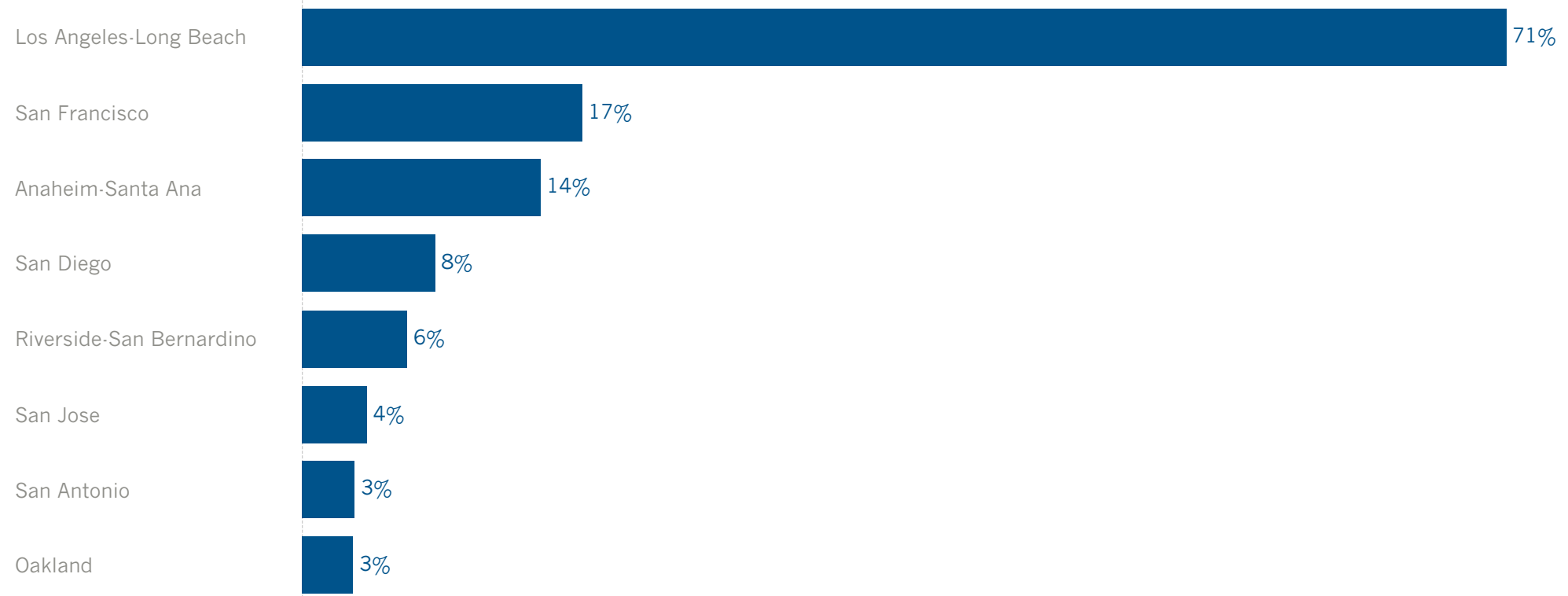


# Destinations Visited

The chart below shows the U.S. destinations visited on a trip among travelers from the focus market.

## Mexico Air

### US Destinations visited



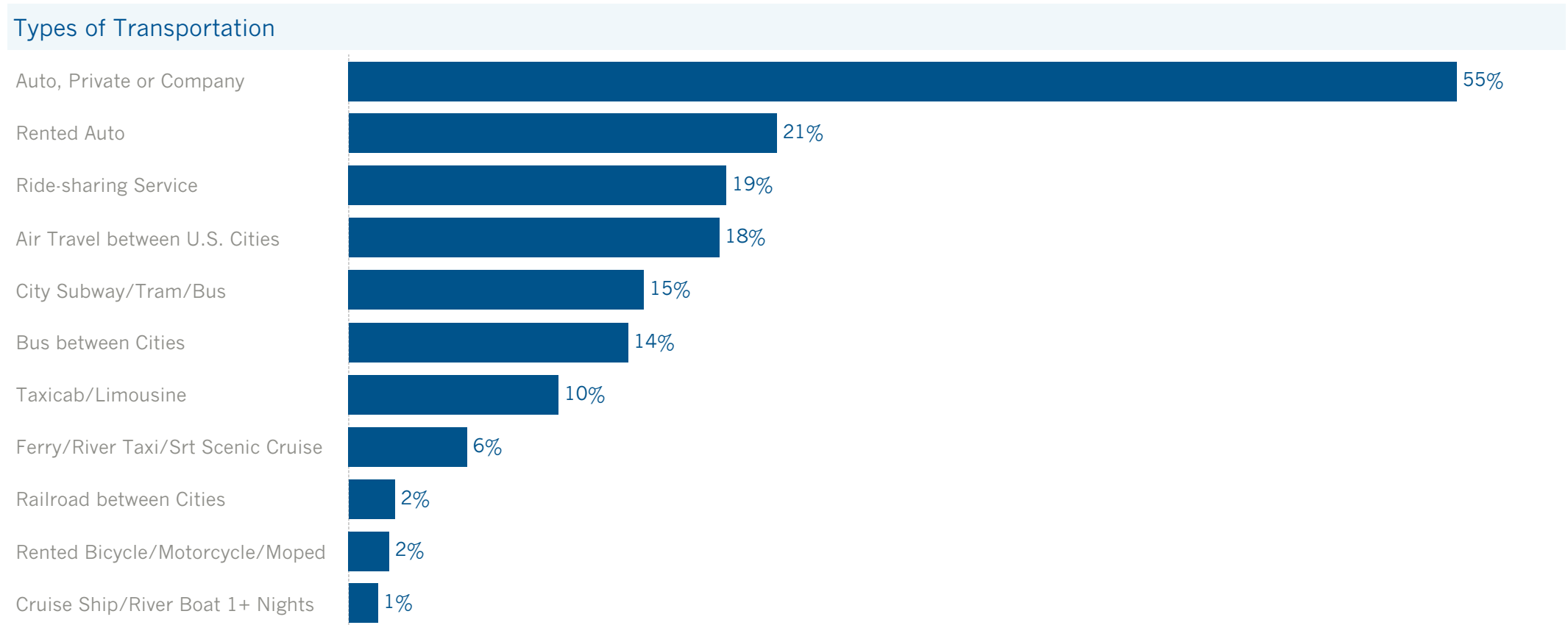




# Transportation

The chart below shows the types of transportation used on the trip among travelers in the focus market.

## Mexico Air

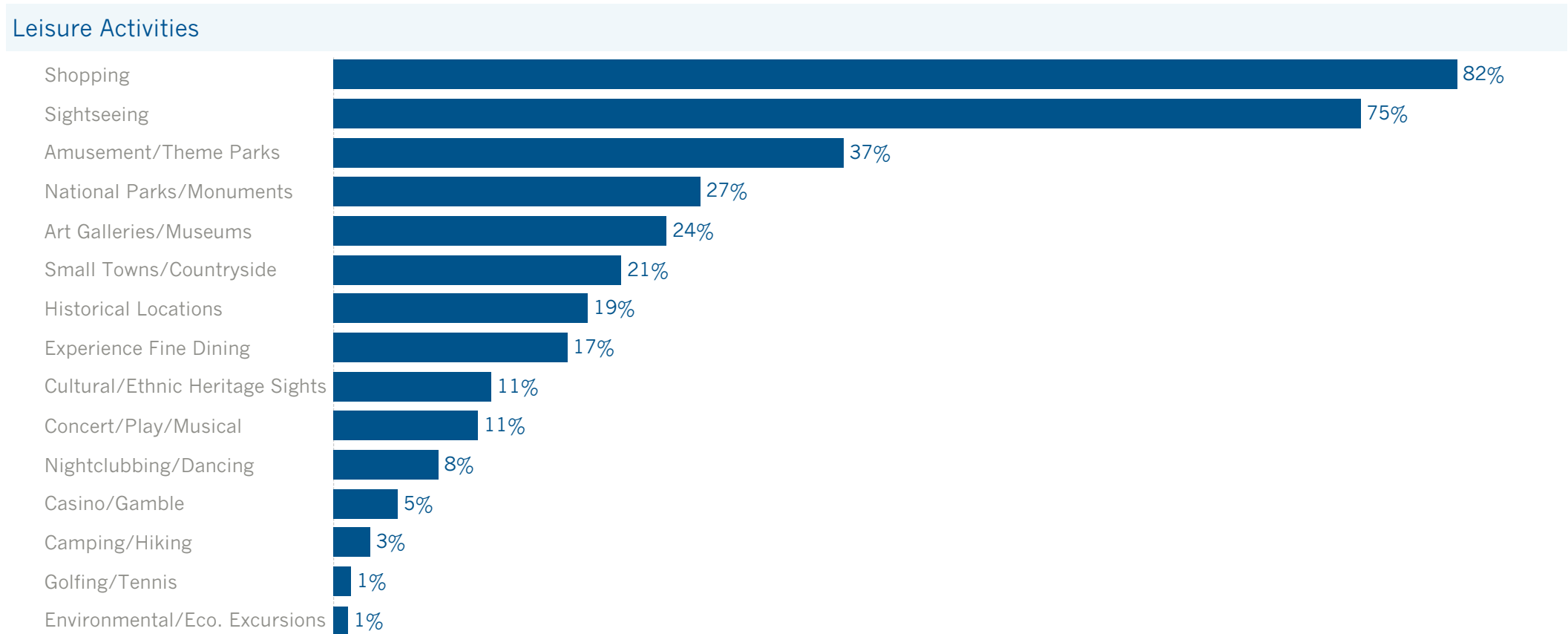




# Activities

The chart below shows the leisure activities engaged in on a U.S. trip among travelers to California from the focus market.

## Mexico Air





# Expenditures in the US

The chart below shows mean expenditures by category among travelers to California from the focus market.

## Mexico Air

### Expenditures per visitor

