



MEXICANS as International Travelers

Action-oriented information for marketing decisions

Consumer and Trade Research

**Prepared for
Canadian Tourism Commission**

June 2003

TravelStyles®
2002-2003 Program

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I ABOUT THIS REPORT	1
About This Report.....	1
Study Design	1
Travel Trade Research	1
TravelStyles Mexico.....	2
PART I GENERAL CONSUMER MARKET	
II TRAVEL PATTERNS	3
Highlights	3
Travel Purpose and Frequency	4
Reactions to the Events of September 11.....	5
Destinations Visited.....	6
The Americas.....	7
Europe	8
Number of Cities Visited.....	9
Seasonality	10
Length of Trip	11
Expenditures	12
Traveling Party Configuration.....	13
Couples	14
Other Family Travel	14
Party Size	14
III APPEAL OF SPECIFIC DESTINATIONS	17
Highlights	17
Relative Appeal.....	18
Europe	19
The Caribbean	20
North America	20
Mexico.....	20
The United States and Canada.....	21
Appeal of Selected North American Cities.....	22
Latin America	24

The Pacific Rim.....	24
Travel Intentions	25
PART II THE MARKET FOR CANADA	
IV MARKET CHARACTERISTICS	27
Highlights	27
Demographics.....	28
Life Stage	28
Language Proficiency.....	29
Some Psychographic Dimensions	30
Enthusiasm for Travel	30
Travel as Education.....	31
A Quest for New Experiences.....	32
Attitudes toward Travel Expenditures	33
Independence and Self-Reliance.....	35
How They Like to Travel.....	36
How They Travel	37
Types of Trips They Would Take	38
Casinos and Gambling	39
Attitudes toward Cruising.....	40
What They Like to Do on Trips.....	41
V ATTITUDES TOWARD CANADA.....	43
Highlights	43
Perceptions of Canada.....	44
Safety.....	45
Value for the Money.....	45
What They Would Enjoy in Canada	46
Urban Sophistication.....	46
Shopping.....	47
Cultural Activities.....	48
Experiences for Children.....	48

Nature and the Outdoors	49
Winter Activities	50
Observations	52
VI TRANSPORTATION AND LODGING	55
Highlights	55
Air Travel	56
Airline Selection Criteria	56
Perceptions and Ratings of Carriers	58
Car Rentals	60
Lodging	61
VII THE PLANNING PROCESS.....	63
Highlights	63
The Decision to Travel	64
Influencing Factors in Destination Selection	65
Planning and Booking Lead Time	66
Sources of Destination Information	67
Role of Travel Agents.....	67
The Internet	69
Traditional Consumer Media	71
Newspapers.....	71
Magazines	72
Cable Television	74
Credit/Charge Cards	74
PART III BUSINESS TRAVEL	
VIII INTERNATIONAL BUSINESS TRAVEL	77
Highlights	77
Market Composition and Characteristics	78
Credit Card Ownership.....	80
Trip Length	80
Destinations	81

Business Extender Travel	82
International Meetings and Conventions	84
Overlap with Pleasure Travel.....	85
Air Travel.....	86
Airline Selection Criteria.....	86
Perceptions and Ratings of Carriers	86

PART IV TRADE RESEARCH

IX MEXICAN TRAVEL TRADE RESEARCH.....	89
Perceptions of Canada.....	89
Strengths	89
Cities.....	89
Nature and Scenery.....	90
People	90
Exchange Rate.....	91
Visa Requirements	91
Dual Cultures.....	91
Barriers.....	92
Flight Availability	93
Limited Awareness	94
Selling Canada.....	95
Top Destinations and Activities	95
Eastern Canada.....	95
Western Canada	96
Typical Clients	97
Canada and the United States	99
Design of Product Line.....	100
Fly-Drive	101
Hotels.....	101
Role of Travel Agents	102
Impact of September 11	102
Outlook.....	103
Interface with the CTC	105
Increasing the CTC's Efforts	107
Desired Assistance	108

Consumer Advertising	108
Publicity to Travel Agents	109
Direct Assistance.....	110
More and Cheaper Flights	111
Summary	111
PART V PROVINCIAL ANALYSIS	
X PROVINCIAL IDENTITIES	113
Appeal of Canadian Destinations.....	113
Creating Provincial Identities	114
Focus on British Columbia	114
Educational Activities.....	115
Skiing and Resorts.....	115
Nature and Wilderness	115
Cruising.....	116
Focus on Ontario.....	116
Theater and the Arts.....	116
Sporting Events	117
Beaches and Cottage Country	117
Golf.....	117
Focus on Quebec.....	118
French Culture and History.....	118
Name Recognition and Luxury Properties	119
Cuisine.....	119
Outdoor Activities.....	120
Appendix A: RESEARCH APPROACH	
Appendix B: ENGLISH QUESTIONNAIRE	
Appendix C: SPANISH QUESTIONNAIRE	
Appendix D: ROSTER OF INTERVIEWEES	
Appendix E: SELECTED SUMMARY TABLES	



I ABOUT THIS REPORT

ABOUT THIS REPORT

Mexican arrivals to Canada have been growing steadily. Because Mexico has the potential to become an even more important market for Canada, the Canadian Tourism Commission (CTC) commissioned Menlo Consulting Group, Inc. (MCG) to provide market intelligence on Mexico.

MCG conducted qualitative research with Mexican travel trade representatives. The trade research was conducted in October and November 2002, and findings were submitted to CTC in December 2002. For the consumer perspective, we drew on our company's TravelStyles® multi-client sponsored study, *Mexicans as International Travelers*.

STUDY DESIGN

TRAVEL TRADE RESEARCH

We interviewed a selection of operators to evaluate their experiences selling and promoting Canada, their attitudes toward the country, and their commitment to doing business there. We also interviewed a selection of agents to measure their awareness of the range of options available in the market and to identify ways in which the CTC could support and encourage their sales of the destination.

MCG staff members interviewed 36 persons in Mexico: 27 tour operators, 8 travel agents, and 1 airline representative. All are heavily involved in selling Canada: most interviewees reported that the market accounts for 30% to 40% of their business.

Tour operators were drawn from a list provided by the CTC. Travel agents were ASTA members; they were further screened to ensure that they personally sold vacation travel to Canada. Only one agent per agency was interviewed. All interviews were conducted by telephone and were approximately 15 minutes long. To maintain consistency, MCG developed and followed a set of defined topics. Open-ended questions encouraged respondents to elaborate on those issues that concerned them. Where applicable, we reviewed respondents' Web sites before calling them to familiarize ourselves with the types of products they offer. A roster of interviewed sources can be found in Appendix D.

TRAVELSTYLES MEXICO

This study is the first comprehensive analysis of upscale Mexicans who travel internationally and the newest addition to Menlo Consulting Group's TravelStyles family of research programs on international travel.¹

To customize the information further for Canada, we included a series of questions proprietary to the CTC and its partners.

The findings are derived from an in-person, in-home survey of 1,042 upscale Mexicans, defined as persons belonging to the A/B or C+ socioeconomic class. These classes account for the top 16.0% of Mexico's urban population—7.1% for class A/B and 8.9% for class C+. We estimate the incidence of travel in these classes to be in the order of 51%.

The survey was directed to upscale Mexicans who took at least one trip of five or more nights outside of Mexico for pleasure, to visit family, or for business in the past three years. We estimate the size of this market at approximately 3 million persons. The survey was conducted in Mexico City, Guadalajara, and Monterrey between November 6 and December 8, 2002.

Parts I and III of this report contain information on Mexican international travelers as a whole; the rest of the report focuses on Canada. More detail on the research approach and English and Spanish versions of the questionnaire are appended.

¹ Other studies in the TravelStyles series include outbound travel from the United States, Canada, the United Kingdom, Brazil, and Argentina.

PART I: GENERAL CONSUMER MARKET



II TRAVEL PATTERNS

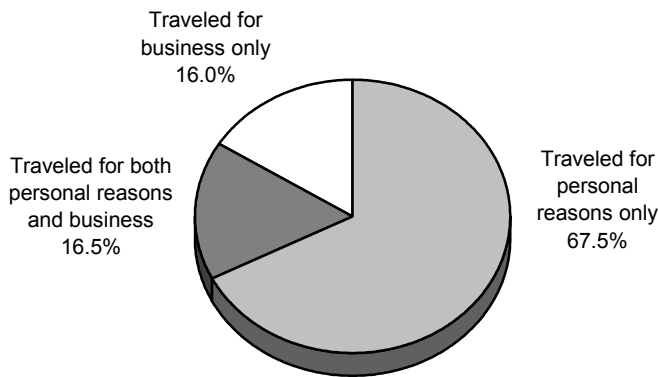
HIGHLIGHTS

- The largest share of Mexican international travel is for personal reasons (that is, for vacation or to visit family); 84% of upscale Mexican travelers took at least one such trip in the past three years.
- Nine out of 10 of those personal trips were taken primarily for vacation.
- Mexican international travelers tend to travel frequently. More than half took three or more international trips in the past three years; one-quarter took six or more trips.
- The Mexican outbound market has been fairly stable in the recent past. The majority say that they have not altered their travel behavior as a result of the tragic events of September 11 and the ongoing threat of terrorism.
- The United States is the destination of choice; 9 in 10 have visited there during their lifetime. Europe and Canada are the next most popular destinations.
- Travel to Canada is heavily weighed to the Eastern Provinces. Only one in five went to British Columbia.
- Traveling in a group of family members is commonplace. Nearly half traveled either with adult family members or with children under 18 on their most recent international trip.

TRAVEL PURPOSE AND FREQUENCY

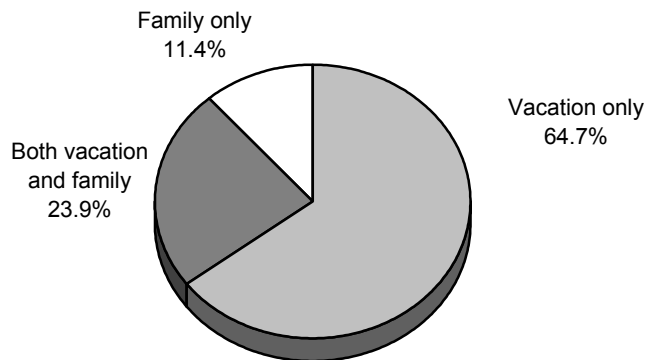
The largest share of Mexican international travel is for personal reasons; that is, for vacation or to visit family. More than 8 in 10 up-scale Mexican travelers (84.0%) took at least one trip outside of Mexico for personal reasons in the past three years (Exhibit II-1). One in five of these also took a business trip. Only 16.0% traveled exclusively for business.²

EXHIBIT II-1. PURPOSE OF TRIPS IN THE PAST THREE YEARS



Most of those who traveled for personal reasons (64.7%) took only vacation trips (Exhibit II-2). Almost one-quarter (23.9%) took both kinds of trips—for vacation and to visit family.

EXHIBIT II-2. PURPOSE OF TRIPS TAKEN FOR PERSONAL REASONS IN THE PAST THREE YEARS



² Those who traveled internationally for business are discussed in a separate chapter in this report.

Mexican international travelers tend to travel frequently. More than half (57.6%) took three or more international trips in the past three years; 26.1% took six or more trips (Exhibit II-3). Fewer than one in five (18.2%) were first-timers, whose most recent international trip was their first trip outside the country. Neophytes are distributed across all age groups, and there is little difference between their profile and that of other travelers.

EXHIBIT II-3. TOTAL NUMBER OF OUTBOUND TRIPS IN THE PAST THREE YEARS—FOR ANY PURPOSE

One	21.1%
Two	21.2
Three	16.1
Four or five	15.4
Six or more	26.1

(Number of respondents = 1,041)

Vacation travelers tend to travel more frequently than those who travel exclusively to visit family (Exhibit II-4). For example, 30.0% of vacation travelers took four or more international trips in the past three years, compared with only 18.0% of those who traveled exclusively to visit family.

EXHIBIT II-4. NUMBER OF OUTBOUND TRIPS IN THE PAST THREE YEARS —BY PURPOSE OF TRIP

	For Vacation	To Visit Family Only
One	31.1%	34.0%
Two	23.5	35.0
Three	15.4	13.0
Four or five	11.8	8.0
Six or more	18.2	10.0
(Number of respondents)	(775)	(100)

REACTIONS TO THE EVENTS OF SEPTEMBER 11

The Mexican outbound market has been fairly stable in the recent past. The majority (57.0%) say that they have not altered their travel behavior as a result of the tragic events of September 11 and the ongoing threat of terrorism. Among all travelers, only 11.2% cancelled a planned trip (Exhibit II-5). The rest are more likely to

travel within Mexico instead of internationally or to take fewer trips outside the country. One-fourth have traveled by land instead of by air. Class A and B respondents are substantially less likely than their class C+ counterparts to alter their behavior.

EXHIBIT II-5. ACTIONS TAKEN BECAUSE OF THE EVENTS OF SEPTEMBER 11, 2001, AND THE ONGOING THREAT OF TERRORISM

	All Travelers	Class A/B	Class C+
Traveled within Mexico instead of internationally	28.4%	22.7%	34.9%
Traveled by land instead of by air	24.8	23.2	26.5
Took fewer trips outside of Mexico	21.1	15.6	27.3
Cancelled a planned trip	11.2	10.5	12.0
(Number of respondents)	(1,041)	(551)	(490)

DESTINATIONS VISITED

The bulk of Mexicans' international travel is within the Americas. Almost all (96.7%) have been to the United States (91.9%), Canada (20.5%), and/or Central or South America (17.5%) (Exhibit II-6). Europe is the second most popular destination among upscale Mexican travelers; 27.4% have visited Europe in their lifetime.

EXHIBIT II-6. DESTINATIONS VISITED

	Ever for Any Reason	In the Past 3 Years*
The United States	91.9%	73.7%
Europe	27.4	22.2
Canada	20.5	14.1
The Caribbean	14.0	9.2
Central America	11.4	5.8
South America	10.8	6.6
Asia	2.5	1.9
Africa	2.1	1.3
The Middle East	2.1	1.3
Oceania	1.0	0.4

(Number of respondents = 1,041)

* For personal reasons.

THE AMERICAS

United States. In the past three years, 73.7% visited the United States for vacation or to visit family. Almost 6 in 10 (58.9%) of these travelers visited only the United States during that time. Throughout this report, we refer to travelers who took trips only to the United States as *U.S.-only travelers*.³

Nearly all travel to the United States is to six states. Texas heads the list; 50.8% of Mexican travelers to the United States visited there in the past three years. California (46.2%) is a close second. Florida (19.1%), Nevada (12.8%), New York (10.7%), and Illinois (10.4%) follow.

Travel for medical treatment (diagnosis, checkup, procedures, follow-up, etc.) has been a very important segment of the Mexican market for many years. In the past three years, 4.2% of those who visited the United States did so for medical treatment for themselves or for a companion.

Canada. About one in seven (14.1%) took a trip to Canada for vacation or to visit family in the past three years.⁴ Most of this travel is to Quebec (60.6%) and Ontario (51.0%) (Exhibit II-7). Combined, these two provinces account for 78.7% of all personal travel to Canada. British Columbia is the only other Canadian province to receive more than 1 in 10 visitors to Canada.

Most Mexican travelers visit Canada alone, rather than in combination with the United States; only about one-quarter of those who visited Canada on their most recent trip also visited the United States on that same trip.⁵

Central or South America. Comparatively few Mexicans visit their Latin neighbors. Only 10.5% visited South or Central America in the past three years. Destinations in South America attracted 6.6% of those who traveled outside of Mexico; a similar number (5.8%) visited Central America.

³ Mexican travelers who visited destinations other than the United States are referred to as *global travelers*. Canada is likely to draw from both pools of travelers.

⁴ Business travel to Canada is discussed in a separate chapter in this report.

⁵ Based on fewer than 100 respondents.

EXHIBIT II-7. PERSONAL TRAVEL TO CANADA—BY PROVINCE*

	All Travelers	Visitors to Canada
Quebec	8.2%	60.6%
Ontario	6.9	51.0
British Columbia	2.7	19.7
Alberta	1.3	9.3
Nova Scotia	0.6	4.2
Manitoba	0.5	3.5
Prince Edward Island	0.4	2.8
Newfoundland	0.3	2.1
New Brunswick	0.2	1.2
Northwest Territories	0.2	1.2
Nunavut	0.1	0.9
Saskatchewan	0.1	0.9
Yukon	0.1	0.9
(Number of respondents)	(1,041)	(141)

* In the past three years.

EUROPE

In the past three years, 22.2% visited Europe for vacation or to visit family. Mexican travel to Europe is focused primarily on the larger Romance-language countries—86.1% of Mexican travel to Europe is to France, Spain, or Italy. France is by far the most popular, hosting almost two-thirds of all travelers to Europe (Exhibit II-8).

Thirteen other European countries—Sweden, Czech Republic, Monaco, Hungary, Portugal, Norway, Denmark, Ireland, Luxembourg, Turkey, Russia, Poland, and Iceland—each attract between 1% and 5% of Mexican travelers to Europe. The remaining ones—Malta, Finland, Northern Ireland, Romania, Slovenia, Croatia, Cyprus, and Estonia—each attract fewer than 1% of Mexican travelers who visit Europe.

EXHIBIT II-8. TOP TEN EUROPEAN COUNTRIES VISITED IN THE PAST THREE YEARS*

	All Travelers	Travelers to Europe
France	14.3%	64.5%
Spain	12.3	55.6
Italy	9.8	44.4
Germany	8.2	36.9
Great Britain	7.9	35.5
Switzerland	5.1	22.8
Belgium	3.7	16.8
Austria	2.9	13.3
Holland	2.9	12.9
Greece	1.9	8.4
(Number of respondents)	(1,041)	(231)

* For personal reasons.

NUMBER OF CITIES VISITED

Most Mexican international travelers visit multiple cities when they travel outside the country; 62.7% visited at least two cities on their most recent international trip (Exhibit II-9). Global travelers are much more likely than U.S.-only travelers to visit multiple cities on any given trip; 85.2% did so on their most recent international trip, compared with 53.3% of U.S.-only travelers. Even the majority (54.5%) of those who traveled primarily to visit family went to more than one city on their most recent trip. In marketing Canada, the CTC may want to consider designing multi-city itineraries.

EXHIBIT II-9. NUMBER OF CITIES VISITED ON MOST RECENT INTERNATIONAL TRIP*

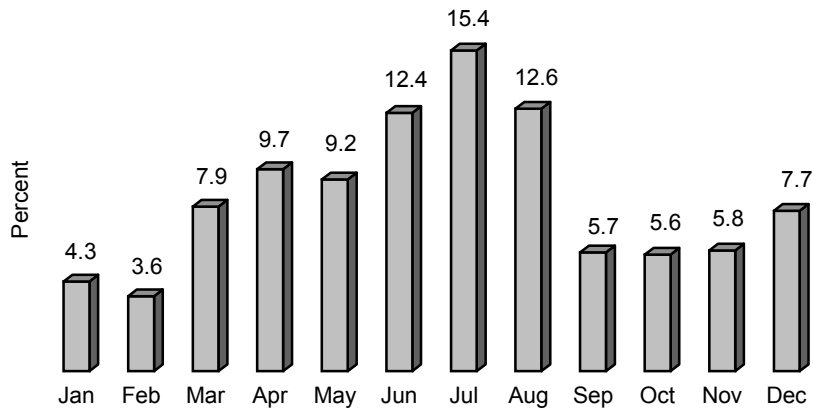
	All Travelers	U.S.-Only Travelers	Global Travelers
One	37.3%	46.7%	14.8%
Two	22.0	25.8	12.9
Three	15.2	13.2	19.9
Four or five	14.4	10.0	25.0
Six or more	11.1	4.2	27.3
(Number of respondents)	(868)	(612)	(256)

* For personal reasons.

SEASONALITY

The majority of Mexican international travelers say that they can travel internationally throughout the year: 59.7% agree with the statement “I am able to take an international trip at any time of the year”; 37.0% agree strongly. This readiness to travel year round suggests marketing opportunities to flatten the marked seasonality that currently exists (Exhibit II-10).

EXHIBIT II-10. MONTH IN WHICH MOST RECENT INTERNATIONAL TRIP STARTED



The peak season, when 40.4% of all international travel occurs, is from June through August. The spring shoulder season—March, April, and May—is the next most popular; 26.8% travel during this period. A school semester break takes place during each of these peak periods. The third school semester break in December coincides with another popular travel month. Many Mexicans also take advantage of *puentes* (bridges) or long weekends to travel outside the country. For many in Mexico City, these bridges are an antidote to stress. As a colleague who lives there recently put it, “We live from bridge to bridge; the stress in this city ‘invites’ us to take flight any time we can.”

Differences in seasonality correlate with purpose of trip, destination visited, and city of residence.

- Those venturing farther afield are more likely than U.S.-only travelers to travel during the summer months; 46.5% of global

travelers traveled during June, July, and August, compared with 37.9% of U.S.-only travelers.

- International travel from Monterrey and Guadalajara tends to spike in the summer. Nearly half of those who reside in Monterrey (49.5%) and Guadalajara (47.1%) traveled in June, July, or August. In comparison, only 33.3% of travelers who reside in Mexico City did so. In fact, international travel by Mexico City residents is more evenly distributed throughout the year.
- Those who traveled primarily to visit family are somewhat more likely than those who traveled primarily for vacation to travel during December and January (17.1% versus 10.7%).

LENGTH OF TRIP

Mexicans tend to take comparatively short trips, although those in the labor force have a relatively high allocation of vacation time.⁶ In the past three years, the majority of travelers (55.7%) did not take any trips longer than two weeks; 33.0% did not take any trips longer than one week (Exhibit II-11). Global travelers tend to take longer trips.

EXHIBIT II-11. LONGEST INTERNATIONAL TRIP IN THE PAST THREE YEARS

	All Travelers	U.S.-Only Travelers	Global Travelers
7 or fewer nights	33.0%	47.4%	15.8%
8 to 14 nights	22.7	20.5	25.3
15 to 21 nights	17.5	14.8	20.7
22 to 28 nights	7.9	5.1	11.2
29 or more nights	18.9	12.2	27.0
(Number of respondents)	(1,041)	(567)	(474)

⁶ Vacation time in Mexico is guaranteed and is based on employee seniority. Six days of paid vacation must be offered after one year of service, plus two additional days each year for the next three years. By the fifth year of service, this equates to two weeks of paid vacation. After five years of employment, two more days must be added for each five-year block of service. Additionally, Mexican law establishes seven legal paid holidays per year. There are also another 15 or so national holidays and several regional holidays.

The majority of Mexican travelers (64.2%) were away from home for two weeks or less on their most recent international trip (Exhibit II-12). In fact, only 14.2% took trips of 29 or more nights. The median length of trip was nine nights.

EXHIBIT II-12. NUMBER OF NIGHTS AWAY FROM HOME ON MOST RECENT TRIP*

	All Travelers	U.S.-Only Travelers	Global Travelers
1 to 4 nights	11.5%	14.4%	4.7%
5 to 7 nights	30.1	37.1	12.9
8 to 14 nights	22.6	21.5	25.5
15 to 21 nights	18.4	17.1	21.6
22 to 28 nights	3.2	1.5	7.5
29 or more nights	14.2	8.5	27.8
(Number of respondents)	(875)	(620)	(255)

* For personal reasons.

Again, we find that global travelers are significantly more likely to take extended trips. Nearly 3 in 10 (27.8%) of those travelers who traveled beyond the United States on their most recent trip were away for more than four weeks, compared with only 8.5% of U.S.-only travelers.

Those who visit family are also more likely to take extended trips; 23.8% of them were away more than four weeks on their most recent trip, compared with only 11.8% of those traveling primarily for vacation.

EXPENDITURES

The majority of Mexican travelers (56.7%) spent less than US\$2,000 per person⁷ on their most recent international trip. Roughly one in seven travelers (13.6%) spent US\$4,000 or more per person. Global travelers were almost twice as likely as U.S.-only travelers to spend US\$4,000 or more (20.8% versus 10.7%) (Exhibit II-13).

Those whose most recent trip was primarily for vacation tended to spend more than those whose trip was primarily to visit family. One in seven vacation travelers (14.8%) spent US\$4,000 or more

⁷ Including everything related to their trip.

per person during their trip, compared with only 8.6% of those who traveled primarily to visit family.

Younger travelers also tend to spend slightly more than their older counterparts; 15.8% of those under 35 spent US\$4,000 or more per person on their most recent trip, compared with 12.3% of those 35 or older. This propensity to spend more may be attributable to the fact that younger travelers tend to take slightly longer trips; 62.9% of those under 35 were away from home for more than one week on their most recent international trip, compared with 55.5% of those 35 or older.

EXHIBIT II-13. AMOUNT SPENT PER PERSON ON MOST RECENT INTERNATIONAL TRIP*

	All Travelers	U.S.-Only Travelers	Global Travelers
Less than US\$500	12.1%	16.0%	2.2%
US\$500 to US\$999	21.8	24.8	14.3
US\$1,000 to US\$1,999	22.8	21.6	26.0
US\$2,000 to US\$2,999	19.3	17.8	22.9
US\$3,000 to US\$3,999	10.5	9.2	13.9
US\$4,000 to US\$4,999	7.1	6.1	9.5
US\$5,000 or more	6.5	4.6	11.3
(Number of respondents)	(820)	(589)	(231)

* For personal reasons.

The tendency to spend more also correlates with socioeconomic class. Class A/B travelers are more than one and a half times as likely as class C+ travelers to have spent US\$4,000 or more per person on their most recent trip (16.8% versus 10.2%).

TRAVELING PARTY CONFIGURATION

The vast majority of travelers (79.5%) were accompanied by someone on their most recent international trip; only 20.5% traveled alone (Exhibit II-14). More than one-third (36.4%) traveled with a spouse or partner. Traveling party composition tends to correlate with the destination visited. For example, U.S.-only travelers are more likely than global travelers to travel with children or with other adult family members and less likely to travel only with friends.

EXHIBIT II-14. COMPOSITION OF TRAVELING PARTY ON MOST RECENT TRIP OUTSIDE OF MEXICO FOR VACATION OR TO VISIT FAMILY

	All Travelers	U.S.-Only Travelers	Global Travelers
Couple only	12.8%	13.7%	10.6%
Couple with other adults	2.2	1.6	3.5
Adult family group	29.1	31.5	23.1
Friends only	12.8	8.6	23.1
Any children under 18	18.2	20.7	12.2
Solo	20.5	20.7	20.0
Other	4.5	3.2	7.5
(Number of respondents)	(874)	(619)	(255)

COUPLES

Comparatively few Mexicans (12.8%) traveled with only their spouse or partner on their most recent international trip. Couple-only travel is more common among Americans and Canadians—roughly 4 in 10 of them typically travel only as couples.⁸

OTHER FAMILY TRAVEL

Traveling with other family members is quite common. Almost 3 in 10 (29.1%) were accompanied by adult family members such as a parent (12.7%), an adult child (12.1%), or another relative—aunt, cousin, sister, etc. (24.7%). Almost one in five (18.2%) took one or more children under 18 along.

Many Mexicans travel internationally with their young children—44.0% of those with children under 18 took them along on their most recent international trip. They are only somewhat more likely to take children to the United States than to other destinations.

PARTY SIZE

Half of all the most recent international trips taken by Mexican travelers consisted of only one or two persons (Exhibit II-15). Those who traveled with one or more children under 18 tended to travel in larger groups; the most common party size for these family travelers was four persons—two adults and two children. Solos

⁸ TravelStyles 2002: *Americans as International Travelers* and TravelStyles 2001: *Canadians as International Travelers*. Unless otherwise specified, all data regarding American and Canadian travelers in this report come from these sources.

were more likely to be traveling primarily to visit family. Also, they tended to be young (47.2% under 35) and male (62.0%).

EXHIBIT II-15. TRAVELING PARTY SIZE ON MOST RECENT TRIP*

	All Travelers	Those Who Traveled with Children under 18
One	20.5%	-
Two	30.0	3.1%
Three	16.1	25.0
Four	15.5	33.8
Five	8.8	21.9
Six or more	9.0	16.3
(Number of respondents)	(874)	(160)

* For personal reasons.



III APPEAL OF SPECIFIC DESTINATIONS

HIGHLIGHTS

- Europe holds the greatest appeal for Mexican travelers, followed by the Caribbean, the United States, and Canada.
- Many Mexicans perceive international destinations to be safer and less expensive to travel in, presenting an opportunity for other countries and a challenge for Mexico.
- Mexican travelers' interest in the United States and Canada is roughly comparable. However, interest in Canada has not yet translated into visitation, suggesting a very strong opportunity for Canada in the Mexican market.
- More than half of Mexican international travelers express a strong interest in visiting their Latin American neighbors. Brazil and Argentina are the most popular destinations in South America.
- Travel to the United States may suffer as a result of the country's tightening of visa requirements. Most Mexican travelers without a U.S. visa say that the cumbersome procedures are likely to make them decide to travel elsewhere. This situation is likely to favor travel to Canada.

RELATIVE APPEAL

Europe is by far the most appealing international destination for Mexican travelers; 88.1% are extremely or very interested in visiting there (Exhibit III-1). The Caribbean (80.3%), the United States (76.2%), and Canada (75.9%) garner a strong level of interest among at least three-quarters of travelers. For all destinations, interest in visiting is higher among previous visitors.

EXHIBIT III-1. INTEREST IN VISITING OR REVISITING SELECTED DESTINATIONS (EXTREMELY OR VERY INTERESTED)

	All Travelers	Previous Visitors
Europe	88.1%	97.2%
The Caribbean	80.3	87.7
The United States	76.2	78.9
Canada	75.9	85.4
South America	56.7	73.4
Central America	46.0	49.6
Oceania	43.1	80.0*
The Middle East	41.0	50.0*
Asia	34.8	55.5*
Africa	28.8	69.6*
(Number of respondents)	(1,041)	(10-957)

*Caution: very small sample size.

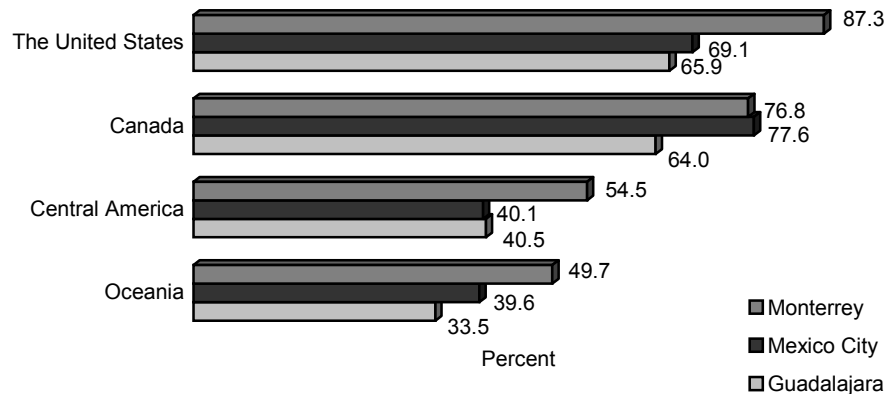
Younger travelers (age 18 to 29) generally express more interest than older Mexicans in most foreign destinations, particularly the Pacific Rim and Africa. Travelers age 30 to 49 are more likely to favor Canada and Latin America. And older travelers (age 50 and beyond) express greater interest in the United States than do their younger counterparts.

Mexicans who speak a foreign language express a stronger desire than other travelers to visit Europe, the Caribbean, and Canada, as well as Asia and Oceania. By contrast, Spanish-only-speaking travelers express a higher level of interest in travel to Central America and the United States.

Europe and the Caribbean are equally appealing to Mexican travelers in all three cities we surveyed. However, residents of Monterrey

generally express higher interest than travelers from Mexico City or Guadalajara in traveling to the United States, South and Central America, and Oceania (Exhibit III-2).

EXHIBIT III-2. INTEREST IN VISITING SELECTED DESTINATIONS—BY CITY
(EXTREMELY OR VERY INTERESTED)



EUROPE

The desirability of Europe to Mexicans cannot be overstated; almost all international travelers (94.2%) express some level of interest in traveling there (Exhibit III-3).

EXHIBIT III-3. INTEREST IN VISITING EUROPE

Extremely	64.9%
Very much	23.2
Somewhat	6.1
Not very much	4.0
Not at all	1.4
Don't know	0.4

(Number of respondents = 1,041)

France is by far the most attractive European country for Mexicans; 61.9% of international travelers express interest in visiting or revisiting the country (Exhibit III-4). Italy (46.4%) is a distant second, followed by Spain (44.6%), Germany (37.5%), and Great Britain (32.3%). No other European country appeals to more than about one in eight travelers.

EXHIBIT III-4. INTEREST IN VISITING SELECTED EUROPEAN COUNTRIES

France	61.9%
Italy	46.4
Spain	44.6
Germany	37.5
Great Britain*	32.3
Holland	12.7
Greece	12.1
Switzerland	8.7
Russia	6.0
Austria	3.4

(Number of respondents = 1,041)

* Great Britain includes England, Scotland, and Wales.

THE CARIBBEAN

As a reflection of their penchant for beach destinations, almost all Mexican travelers (93.1%) express some level of interest in the Caribbean. However, only 14.0% of international travelers have ever been to the Caribbean, and just 12.5% plan to go there in the next two years. Clearly, domestic destinations on Mexico's own Caribbean coast are stiff competition for the islands.

Cuba has become a favorite destination for many Mexicans in recent years; 27.9% of Mexican travelers indicate strong interest in traveling to the country. Vacationing in Cuba is convenient and affordable: direct flights leave from Mexico City and from Cancun, and costs on the island are significantly lower than those in Mexico's own beach resorts. Like Canada, Mexico has maintained relations with Cuba despite the U.S. trade embargo, and many Mexican businesses keep investments there.

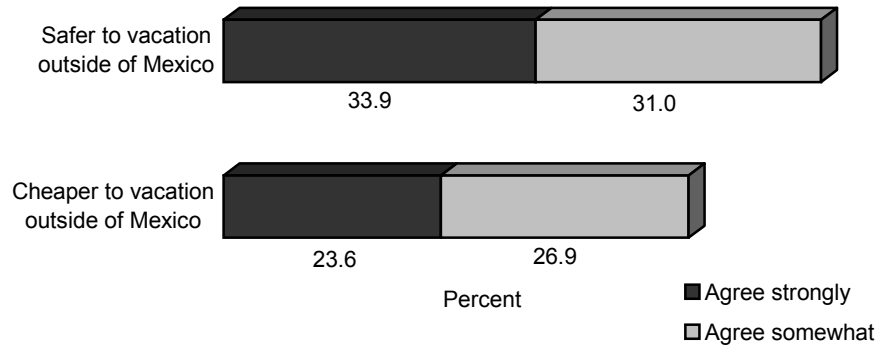
NORTH AMERICA

MEXICO

Mexicans are unusual among Latins in that they genuinely enjoy traveling within their own country and tend to do so extensively. Besides a love for their beach resorts, many display an appreciation for national archaeological sites and colonial towns and make a point of traveling regularly to the country's interior for local festivals.

The fact that many Mexicans perceive international destinations to be safer or less expensive to travel in than Mexico presents an opportunity for other countries and a challenge for Mexico. For example, 64.9% agree that it is safer to vacation outside of Mexico; similarly, 50.5% agree that it is cheaper to do so (Exhibit III-5).

EXHIBIT III-5. PERCEPTIONS OF RELATIVE COST AND SAFETY WITH REGARD TO INTERNATIONAL TRAVEL



THE UNITED STATES AND CANADA

Mexican travelers’ interest in the United States and Canada is roughly comparable; 76.3% are extremely or very interested in visiting or revisiting the United States, and 75.8% express similar interest in visiting Canada (Exhibit III-6). However, interest in Canada has not yet translated into visitation—while 87.7% of international travelers visited the United States in the past three years, just 16.2% went to Canada. These data suggest a very strong opportunity for Canada in the Mexican market.

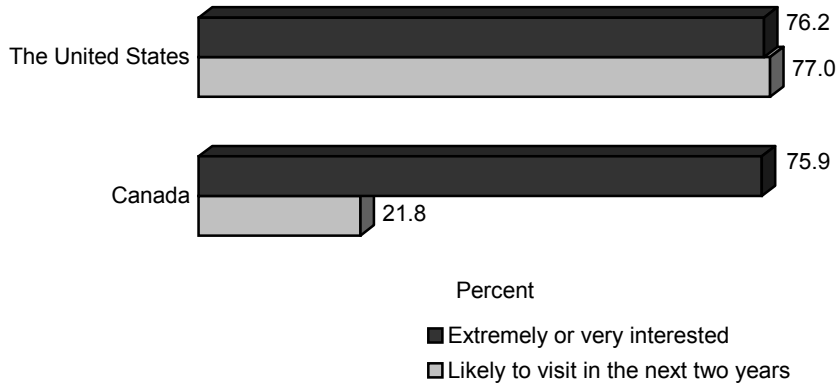
EXHIBIT III-6. INTEREST IN VISITING THE UNITED STATES AND CANADA

	United States	Canada
Extremely	37.9%	38.8%
Very much	38.4	37.0
Somewhat	14.7	15.1
Not very much	5.6	5.7
Not at all	3.2	2.7
Don't know	0.3	0.6

(Number of respondents = 1,041)

The discrepancy between interest and visitation is likely to continue over the short term. Substantially fewer Mexican travelers say they are likely to travel to Canada than to the United States within the next two years (Exhibit III-7).

EXHIBIT III-7. INTEREST IN VISITING THE UNITED STATES AND CANADA, IN COMPARISON WITH LIKELIHOOD OF VISITING IN THE NEXT TWO YEARS



Over the longer term, the gap between interest and visitation and intentions to do so is likely to narrow, particularly if Canada increases its promotional activities to those segments that offer special promise.

APPEAL OF SELECTED NORTH AMERICAN CITIES

Mexicans are drawn to the excitement and vibrancy of a number of cities in the United States and Canada. With its strong Latin influence, excellent air links, and plentiful shopping, Miami is the most appealing urban destination for Mexican travelers; 75.6% are extremely or very interested in visiting the city (Exhibit III-8). More than 7 in 10 international travelers also express a strong interest in visiting Las Vegas, New York City, Toronto, and Montreal.

EXHIBIT III-8. INTEREST IN VISITING OR REVISITING
SELECTED NORTH AMERICAN CITIES
(EXTREMELY OR VERY INTERESTED)

Miami	75.6%
Las Vegas	73.6
New York	72.7
Toronto	71.7
Montreal	70.2
Orlando	69.9
San Francisco	68.1
Vancouver	67.5
Quebec City	63.1
Ottawa	62.4
Los Angeles	61.2
Washington, D.C.	56.8
San Diego	54.6
Chicago	54.2
San Antonio	53.5
Houston	52.7
Calgary	48.5
Whistler	41.9

(Number of respondents = 1,041)

Different cities appeal to different segments of Mexican travelers. For instance, Orlando attracts families; 42.2% of travelers with children under the age of 18 say they are extremely interested in visiting Orlando, compared with 28.3% of other travelers. Similarly, Las Vegas draws younger Mexicans; 43.1% of travelers age 54 or younger are extremely interested in visiting Las Vegas, compared with 37.4% of travelers age 55 or older.

Within Canada, Montreal attracts younger travelers; 36.7% of travelers age 44 or younger are extremely interested in visiting Montreal, compared with 26.4% of travelers age 45 or older. Similarly, Quebec City appeals strongly to French speakers; 43.0% of French-speaking travelers are extremely interested in visiting Quebec City, compared with 26.7% of travelers who do not speak the language.

Mexican travelers who have previously visited Canada are most interested in visiting or revisiting Montreal, Toronto, Vancouver, Quebec City, and Ottawa (Exhibit III-9). Interestingly, the level of interest in visiting Montreal surges among those who have previ-

ously visited Canada, and Montreal is the city travelers are most likely to want to revisit. It is clear that Mexican travelers have had very positive experiences when traveling in Canada, and that they look forward to returning.

EXHIBIT III-9. INTEREST IN VISITING OR REVISITING SELECTED
CANADIAN CITIES AMONG PREVIOUS VISITORS TO CANADA
(EXTREMELY OR VERY INTERESTED)

Montreal	85.7%
Toronto	81.6
Vancouver	80.2
Quebec City	78.9
Ottawa	74.5

(Number of respondents = 214)

LATIN AMERICA

More than half (56.7%) of Mexican travelers indicate a strong interest in visiting South America; Central America appeals to fewer (46.1%). Brazil (65.8%) and Argentina (57.8%) are by far the most popular Latin American destinations among international travelers (Exhibit III-10).

EXHIBIT III-10. DESIRE TO VISIT SELECTED
LATIN AMERICAN COUNTRIES

Brazil	65.8%
Argentina	57.8
Venezuela	31.0
Colombia	23.3
Chile	23.2
Peru	15.1
Costa Rica	12.7
Panama	6.8
Guatemala	5.5

(Number of respondents = 1,041)

THE PACIFIC RIM

More than 4 in 10 Mexican travelers (43.1%) are extremely or very interested in visiting Oceania (Australia, New Zealand, and the South Pacific islands); 34.8% express strong interest in Asia.

Generally speaking, Oceania draws young and single Mexicans; 47.6% of unmarried travelers are extremely or very interested in visiting the region, compared with 39.5% of married travelers. Similarly, 50.6% of travelers age 18 to 34 express strong interest in the region, compared with 38.1% of travelers age 35 or older. Asia is generally more popular with women (38.4%) than with men (30.5%).

TRAVEL INTENTIONS

Whether in fact travelers ever visit the places on their “wish list” and the order in which they visit them depend on a variety of factors—distance, cost and proximity, and entry requirements among them.

The majority of Mexican travelers say they are likely to visit the United States in the next two years (Exhibit III-11). Almost all (91.3%) of these have a valid U.S. visa. Over the longer term, travel to the United States may suffer from the country’s tightening of entry procedures. After September 11, obtaining or renewing a visa to travel to the United States from Mexico—as from many other countries—has become more time consuming, difficult, and expensive. The more cumbersome procedures may cause some Mexicans to decide to travel elsewhere. In fact, most (76.4%) of those without a current U.S. visa say they are likely to travel elsewhere to avoid the procedures required to obtain one.

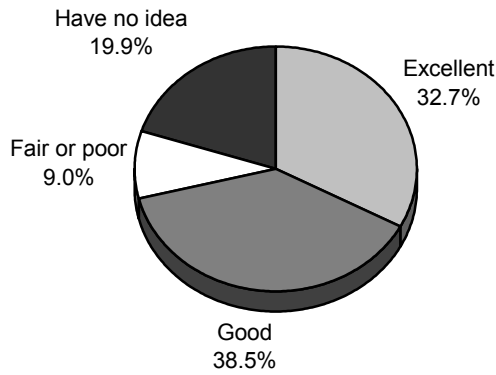
EXHIBIT III-11. LIKELIHOOD OF VISITING SELECTED DESTINATIONS IN THE NEXT TWO YEARS

The United States	77.0%
Europe	34.8
Canada	21.8
The Caribbean	12.5
South America	7.4
Central America	5.2
Oceania	2.0
The Middle East	1.9
Asia	1.4
Africa	1.3

(Number of respondents = 1,041)

Canada may benefit from the U.S.'s tightening of entry procedures. Mexicans visiting Canada as tourists do not require visas to be issued before arrival. As a result, the majority (71.2%) of Mexican international travelers rate Canada's entry requirements very highly (Exhibit III-12).

EXHIBIT III-12. MEXICAN INTERNATIONAL TRAVELERS' PERCEPTION OF CANADA'S ENTRY REQUIREMENTS



PART II: THE MARKET FOR CANADA



IV MARKET CHARACTERISTICS

HIGHLIGHTS

- Three-quarters of Mexican international travelers in the three cities we surveyed are extremely or very interested in visiting or revisiting Canada. We refer to these travelers as *target travelers for Canada*.
- Many target travelers for Canada are multilingual; three-quarters speak a language other than Spanish; almost one in six speak at least two other languages.
- International travel is an integral part of the lifestyle of upscale Mexicans. The vast majority of target travelers say that international travel is common among their circle of friends.
- Mexicans tend to value travel for its educational value and overwhelmingly consider international travel an investment in the education of their children.
- On their international trips, upscale Mexicans place a high value on comfort and convenience and tend to be ready to pay a premium to treat themselves and their families to top-quality experiences and services.
- Almost all target travelers admit to splurging on some aspect of their international trips. They are especially prone to splurge on lodging, a reflection of the value they place on high-end hotels.
- As travelers, they tend to be hands-on, independent, and self-reliant. They are generally averse to delegating travel arrangements. Although many often travel in groups with family members or friends, only 1 in 10 would opt for an escorted group tour.

We estimate that about three-quarters (75.9%) of upscale Mexican international travelers in the three cities surveyed are in the market for Canada. They comprise a market of approximately 2.3 million persons. These travelers have indicated that they are extremely or very interested in visiting or revisiting Canada. The chapters in this part of the report describe these *target travelers for Canada*.

DEMOGRAPHICS

Upscale Mexicans of all ages travel internationally (Exhibit IV-1). This pattern is similar to that of Brazil, and contrasts sharply with Canada and the United States, where international travel, particularly to long-haul destinations, is heavily weighted toward older travelers.

EXHIBIT IV-1. AGE DISTRIBUTION OF TARGET TRAVELERS FOR CANADA

18 to 24	18.6%
25 to 34	20.4
35 to 44	18.6
45 to 54	21.4
55 to 64	11.1
65 or older	9.9

(Number of respondents = 790)

The majority (54.7%) of target travelers surveyed for this study belong to class A/B. These individuals are more likely than their counterparts in class C+ to be global travelers. The sample included more men (53.0%) than women. Most survey respondents (56.6%) are married.

Residents of Mexico City comprise almost half (49.9%) of target travelers in this study. Residents of Monterrey account for 41.4%; the balance reside in Guadalajara.

LIFE STAGE

About one-third (35.6%) of target travelers have children under 18 living at home (Exhibit IV-2). This is somewhat higher than among Canadian international travelers, 27.3% of whom have children under 18 living at home.

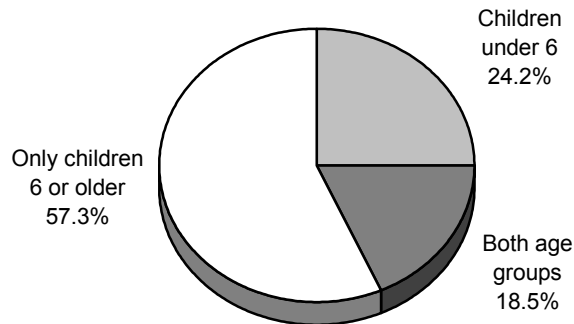
EXHIBIT IV-2. AGE OF CHILDREN LIVING IN HOUSEHOLD
(TARGET TRAVELERS FOR CANADA)

Have children under 18 living at home	35.6%
Under 6	15.2
6 to 12	16.6
13 to 17	16.1

(Number of respondents = 789-790)

Most have only one or two children under 18; 42.3% have one child and 39.5% have two children. The majority (57.3%) of those with children under 18 have only children aged 6 or older at home (Exhibit IV-3).

EXHIBIT IV-3. AGE OF CHILDREN
(TARGET TRAVELERS FOR CANADA
WITH CHILDREN UNDER 18 AT HOME)



Mexicans like to travel with their children. Nearly half (44.5%) of target travelers with children under 18 took them along on their most recent trip outside of Mexico. It is somewhat more common to travel with older children; 49.6% of those whose children are all 6 or older took them along on their most recent trip, compared with 37.8% of those with children under 6.

LANGUAGE PROFICIENCY

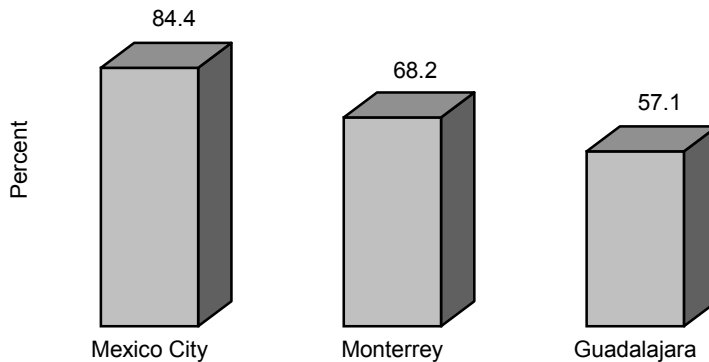
Many Mexican international travelers are multilingual. Three-quarters (77.6%) of Canada’s target travelers speak a language other than Spanish, and 15.3% speak at least two other languages. Class A/B travelers are more likely than class C+ travelers to speak an-

other language; 84.0% of class A/B travelers do so, compared with 69.8% of class C+ travelers. Among all target travelers, English is the most commonly spoken foreign language (75.3%), followed by French (11.6%).

Younger Mexican travelers are slightly more likely than older ones to speak English; more than three-quarters (78.2%) of target travelers under 35 say they speak English, compared with 68.9% of target travelers 55 or older.

English language proficiency correlates with geography; significantly more target travelers in Mexico City speak English, compared with those who live in Monterrey or Guadalajara (Exhibit IV-4). For maximum effectiveness in promoting Canada, marketing materials aimed at Guadalajara should be in Spanish.

EXHIBIT IV-4. ENGLISH PROFICIENCY—BY CITY OF RESIDENCE
(TARGET TRAVELERS FOR CANADA)



SOME PSYCHOGRAPHIC DIMENSIONS

ENTHUSIASM FOR TRAVEL

Upscale Mexicans like to travel and do so often, both within and outside Mexico. The vast majority of target travelers (84.4%) took at least one domestic vacation trip in the past year in which they were away from home for two or more nights (Exhibit IV-5). One-third (32.8%) took four or more such trips.

EXHIBIT IV-5. NUMBER OF DOMESTIC TRIPS IN THE PAST 12 MONTHS
(TARGET TRAVELERS FOR CANADA)

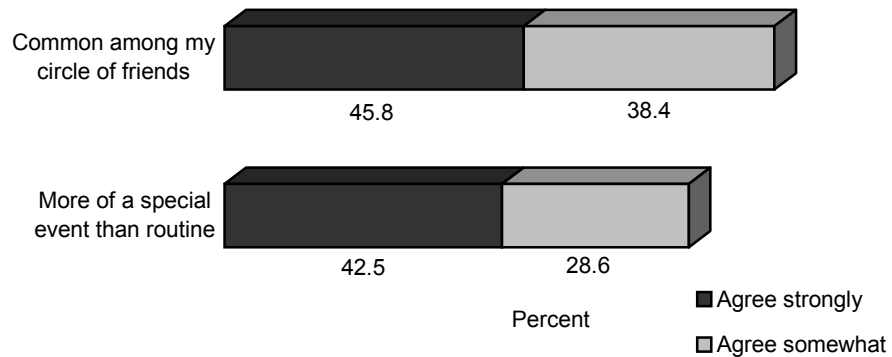
None	15.6%
One	16.2
Two	21.3
Three	14.1
Four or five	17.6
Six or more	15.2

(Number of respondents = 789)

International travel is an integral part of the lifestyle of upscale Mexicans. The vast majority of target travelers (84.2%) agree with the statement “International travel is common among my circle of friends” (Exhibit IV-6). Predictably, class A/B travelers are more likely than those in class C+ to agree with the statement.

The data suggest that they would like to travel more than they actually do and that they do not take their travels for granted. Seven in 10 target travelers (71.1%) agree with the statement “For me, an international trip is more of a special event than routine.”

EXHIBIT IV-6. PERCEPTIONS OF INTERNATIONAL TRAVEL
(TARGET TRAVELERS FOR CANADA)

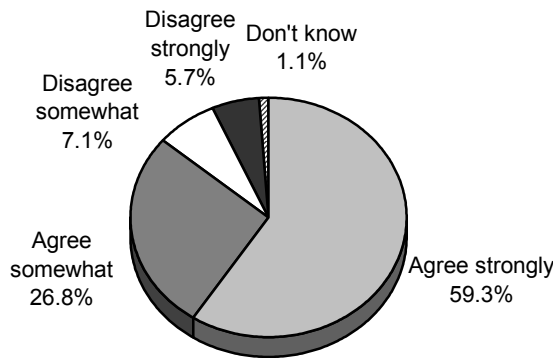


TRAVEL AS EDUCATION

Like many other Latin Americans, Mexicans place a high value on the educational aspect of travel. In fact, a commonly used descriptor for someone not considered especially interesting or accomplished is “*no ha viajado*” (he or she hasn’t traveled) or “*no tiene mundo*” (he/she has no world view or perspective).

Many Mexicans value travel for their own edification, as well as to round their children’s education; in fact, the majority of target travelers (73.9%) agree at least somewhat with the statement “I think of travel as an investment in the education of my children,” and more than half of them agree strongly. Agreement is even stronger among those with children under 18 living at home, 86.1% of whom agree—59.3% agree strongly (Exhibit IV-7).

EXHIBIT IV-7. “I THINK OF TRAVEL AS AN INVESTMENT IN THE EDUCATION OF MY CHILDREN”
(TARGET TRAVELERS FOR CANADA WITH CHILDREN UNDER 18 LIVING AT HOME)

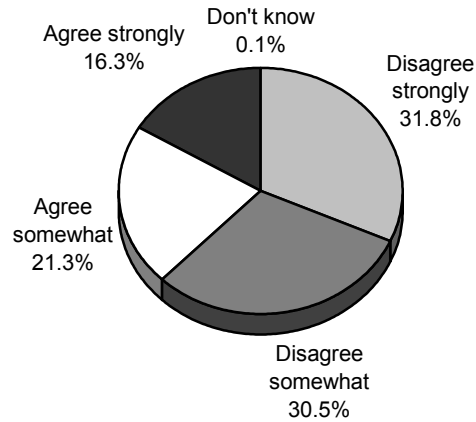


Canada offers many opportunities for educational travel. For instance, upscale Mexicans send their children to summer camp in Canada to learn English or French. Further promoting Canada’s museums, cultural events, and historical attractions will bolster Canada’s reputation as an educational destination.

A QUEST FOR NEW EXPERIENCES

Like their counterparts in other countries, Mexicans travel primarily to see and experience what they cannot do in Mexico. Other MCG research has indicated that Mexicans are motivated to travel by the new and different. And indeed, the majority are more inclined to try out new places rather than to return to those they already know; 62.3% of Mexican international travelers disagree with the statement “I prefer to return to places that I already know rather than experiment with a new place” (Exhibit IV-8). Three of 10 (31.8%) disagree strongly.

EXHIBIT IV-8. "I PREFER TO RETURN TO PLACES THAT I ALREADY KNOW RATHER THAN EXPERIMENT WITH A NEW PLACE"
(TARGET TRAVELERS FOR CANADA)



Previous visitation to Canada among Mexican travelers is relatively low, presenting the opportunity for Canada to position itself as a new and exciting destination. This approach would be particularly effective in attracting younger travelers, who are the most inclined to try out new places.

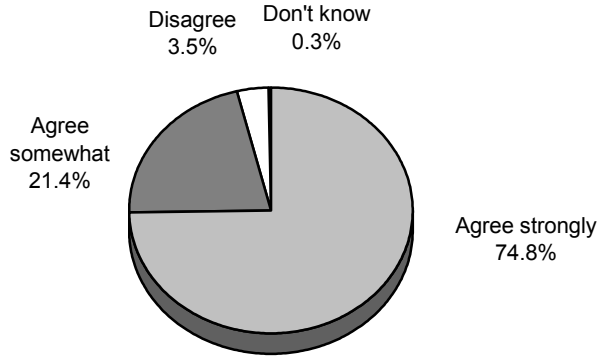
Although most Mexicans want to broaden their horizons by going to new places, more than a third of target travelers (37.6%) do want to revisit destinations to relive enjoyable experiences.

ATTITUDES TOWARD TRAVEL EXPENDITURES

Mexican travelers, like many of their Latin counterparts, tend not to want to “rough it” on their vacation trips. Almost all target travelers (94.7%) agree with the statement “Comfort and convenience are a priority for me when I travel outside of Mexico”; 72.9% agree strongly. Women and global travelers are the most inclined to seek comfort and convenience on their travels.

In addition to wanting to be catered to, they are often willing to pay a premium for top-quality experiences and services. Almost all target travelers for Canada (96.2%) agree to some extent with the statement “On vacation, I tend to treat myself and my family to the best that I can afford”; 74.8% agree strongly (Exhibit IV-9). This willingness to opt for the best they can afford is an important differentiating characteristic of Mexican travelers that makes them highly desirable as patrons of all kinds of tourist services. Older travelers, married travelers, and those with children under 18 are especially likely to agree with the statement.

EXHIBIT IV-9. “ON VACATION, I TEND TO TREAT MYSELF AND MY FAMILY TO THE BEST THAT I CAN AFFORD” (TARGET TRAVELERS FOR CANADA)



Nearly all target travelers (99.0%) admit that they are likely to splurge on at least one aspect of an international vacation. Shopping heads the list, followed by dining and lodging (Exhibit IV-10). Women are somewhat more likely to splurge on shopping, on tickets to cultural activities and entertainment, and on excursions. Men are somewhat more likely to splurge on dining and hotels.

EXHIBIT IV-10. ASPECTS OF AN INTERNATIONAL TRIP ON WHICH TARGET TRAVELERS FOR CANADA ARE LIKELY TO SPLURGE

Shopping	74.7%
Dining	64.7
Lodging	63.0
Tickets to cultural activities and entertainment	49.6
Tours and excursions	43.0

(Number of respondents = 790)

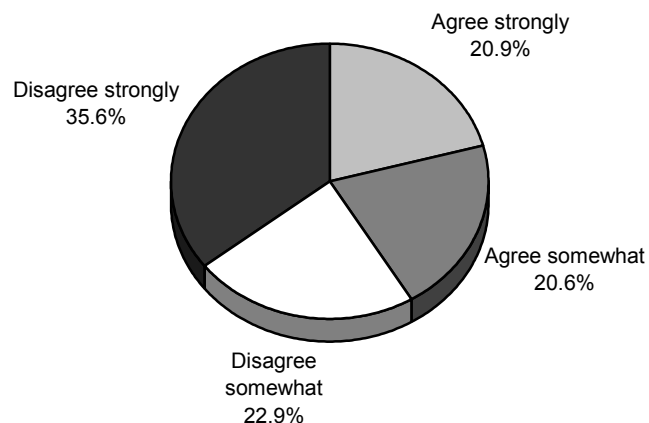
Again, like many upscale Latins, Mexicans tend to stay in very nice places when they travel. In this regard, they differ markedly from their Canadian counterparts. Target travelers are almost twice as likely as Canadian international travelers to splurge on lodging on an international vacation (63.0% versus 32.8%).

INDEPENDENCE AND SELF-RELIANCE

As travelers, upscale Mexicans tend to be “hands-on,” independent, and self-reliant. Most read up in advance on the countries they are going to visit; in fact, only 18.1% of Canada’s target travelers agree strongly with the statement “I usually don’t read much about the countries that I am planning to visit.”

Among upscale Mexicans, delegating is almost part of the culture; yet, when it comes to travel, the majority like to involve themselves directly with the arrangements. Fewer than half of target travelers (41.5%) agree with the statement “I like others to make the arrangements and handle all the details for me”; only one in five agree strongly (Exhibit IV-11).

EXHIBIT IV-11. “I LIKE OTHERS TO MAKE THE ARRANGEMENTS AND HANDLE ALL THE DETAILS FOR ME” (TARGET TRAVELERS FOR CANADA)



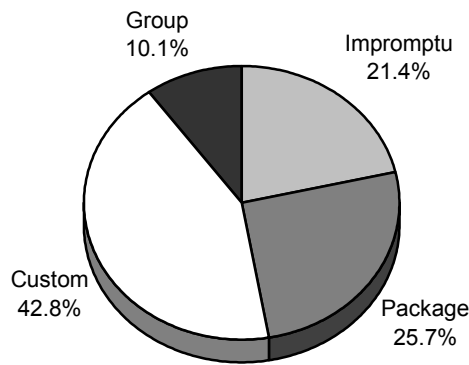
Many Mexican travelers like to plan ahead. The majority of target travelers for Canada typically purchase or arrange sightseeing tours (65.7%) and admission to events (56.0%) before their departure on international trips.

Probably because so many of them are experienced travelers and speak other languages, most target travelers feel at home in non-Spanish-speaking environments. Fewer than one in seven (13.6%) agree strongly with the statement “I feel a little uneasy in places where Spanish is not spoken”; an additional 23.6% agree somewhat.

HOW THEY LIKE TO TRAVEL

Mexicans’ travel arrangement preferences reflect the value that they place on independence and individuality. When traveling internationally, the great majority of target travelers (89.9%) favor striking out on their own (Exhibit IV-12). MCG segments these independent travelers according to the degree of structure that they are most comfortable with during their vacations.

EXHIBIT IV-12. TRAVEL ARRANGEMENT PREFERENCES OF TARGET TRAVELERS FOR CANADA



Impromptu travelers are the most flexible and spontaneous. They like to travel without a fixed schedule and with few or no advance reservations, instead making arrangements as they go. They account for 21.4% of all target travelers.

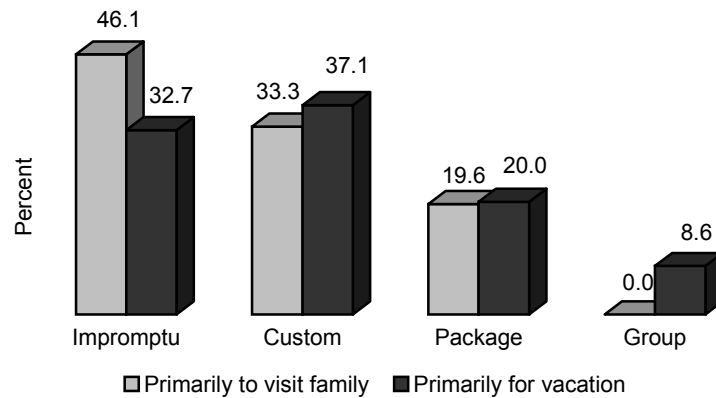
Package and *custom* travelers prefer to have advance reservations. Package travelers—accounting for 25.7% of Canada’s target travelers—are content to purchase an off-the-shelf itinerary. Reflecting their desire for a personalized experience, 42.8% of target travelers favor custom arrangements—tailor-made itineraries prepared to their specifications.

Although Mexicans often travel in groups with family or friends, just 1 in 10 target travelers (10.1%) would opt for an escorted group tour. Group travelers are somewhat older than those who opt for independent travel.

HOW THEY TRAVEL

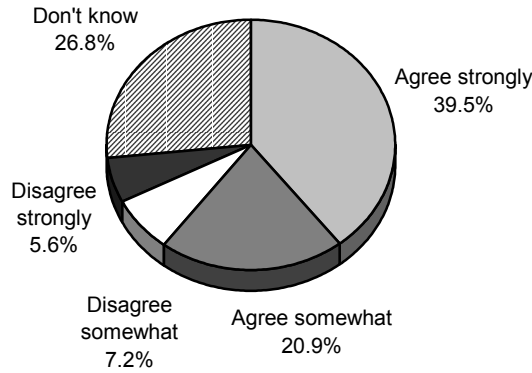
A variety of factors—including reason for travel and familiarity with the selected destination—influence travel arrangements for a particular trip. For instance, target travelers whose most recent trip was primarily for vacation were more likely to go with custom arrangements, while those who traveled primarily to visit family tended to do so impromptu, or largely without advance reservations (Exhibit IV-13). Only 1.7% of travelers took an ocean cruise on their most recent international trip.

EXHIBIT IV-13. TRAVEL ARRANGEMENTS ON MOST RECENT INTERNATIONAL TRIP (TARGET TRAVELERS FOR CANADA)



Finding a good fare or package has a great influence on Mexican travelers' selection of a destination. The majority of target travelers believe that when traveling to Canada, it is cheaper to buy a vacation package than to buy air, ground, and hotel on their own; 60.4% agree in some measure. However, many Mexican travelers are unsure of the relative prices of traveling to Canada on a vacation package and a custom itinerary; more than one in four target travelers (26.8%) don't know which would be less expensive (Exhibit IV-14).

EXHIBIT IV-14. “WHEN TRAVELING TO CANADA IT IS CHEAPER TO BUY A VACATION PACKAGE THAN TO BUY AIR, GROUND, AND HOTEL ON YOUR OWN” (TARGET TRAVELERS FOR CANADA)



TYPES OF TRIPS THEY WOULD TAKE

The lure of the beach is very strong for Mexicans. Although Mexico has beautiful coastlines of its own, most target travelers (71.9%) say they would be highly likely to travel internationally for a beach vacation (Exhibit IV-15).

EXHIBIT IV-15. LIKELIHOOD OF TAKING VARIOUS KINDS OF INTERNATIONAL TRIPS

	Highly Likely	Somewhat Likely
A beach vacation	71.9%	21.9%
A general sightseeing trip spent seeing the highlights of a destination	58.2	36.3
A trip with a strong emphasis on culture and education	41.5	39.1
A trip focused on nature and ecology	29.7	40.1
A trip built around casinos and gambling	25.3	28.5
A trip built around an outdoor activity such as skiing, rafting, hiking, or bicycling	25.2	37.6

(Number of respondents = 789-790)

Mexican travelers are also partial to trips that offer a range of activities and experiences. The least specialized kind of trip—a general sightseeing trip touching on the highlights of a destination—is very popular; more than half (58.2%) of target travelers say they would

be highly likely to take such a trip. Similarly, 41.5% say they would be highly likely to take a trip with a strong emphasis on culture and education. Fewer of them are likely to take international trips built around just one theme, be it nature or a particular outdoor activity.

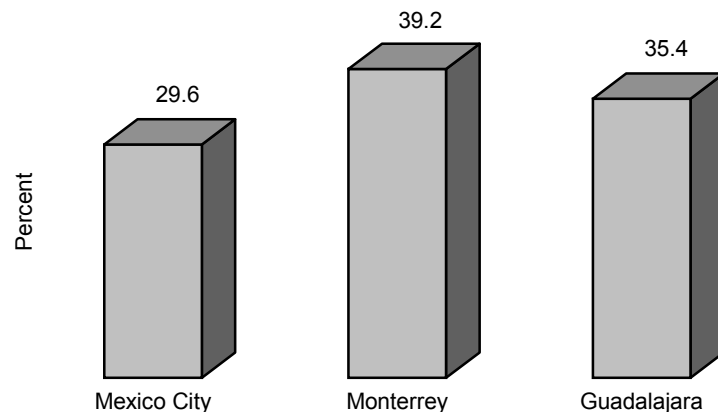
CASINOS AND GAMBLING

Many travelers are keen on visiting casinos and partaking in gaming on international trips, probably because casinos are prohibited in Mexico. The majority (53.8%) of target travelers would be likely to take a trip built around casinos and gambling.

Many Canadian destinations offer casinos and gaming, and Mexican travelers visiting Canada would be likely to enjoy building such activities into their itinerary. Mexican *gaming enthusiasts*⁹ account for 34.1% of all target travelers for Canada and constitute a particularly promising segment for casinos, racetracks, and other gaming establishments. By and large, they are more likely than other Mexican travelers to be young, upper class, and men.

Residents of Monterrey are more likely than other target travelers to be drawn to casinos and gambling. Nearly 4 of 10 travelers from Monterrey (39.2%) are gaming enthusiasts, compared with 29.6% of travelers from Mexico City and 35.4% of those from Guadalajara (Exhibit IV-16).

EXHIBIT IV-16. GAMING ENTHUSIASTS—BY CITY



⁹ Target travelers who are highly likely to take a trip built around casinos and gambling *or* who are highly likely to go to a casino or gamble while on an international vacation.

ATTITUDES TOWARD CRUISING

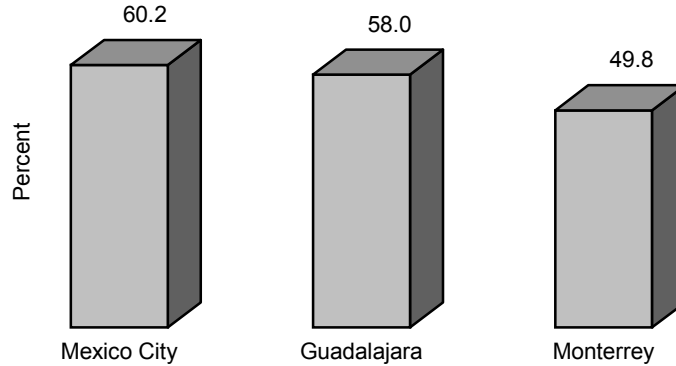
Cruising is relatively new for Mexicans—only 15.2% of target travelers have ever taken an ocean cruise of three or more nights duration. However, cruising could really take off in Mexico, as suggested by the fact that more than half (55.7%) of travelers say they are likely to cruise in the next two years; 11.8% indicate that they are very likely to do so. Cruise lines in Canada, along both the Pacific and Atlantic coasts, stand to benefit from this high level of interest.

In our view, cruises are an ideal travel product for Mexicans; cruising offers the variety that they seek, and cruising is well suited for those who like to travel in small groups of family members or friends, as Mexicans often do. Moreover, cruising offers the pampering and customized attention that many Mexicans enjoy.

On the basis of their past experience and intentions, we estimate that roughly half of Canada's target travelers are in the market for cruising. These travelers are the industry's best prospects for expanding the market. *Cruisers*—those who have cruised previously and say they are very or somewhat likely to cruise in the next two years—account for 12.7% of target travelers. A further 43.0% are *potential new cruisers*—those who have never taken an ocean cruise but say they are very or somewhat likely to do so in the next two years. The balance (44.3%) of travelers are *non-cruisers*; irrespective of their previous cruising experience—these travelers say that they are not likely to cruise in the next two years.

Residents of Mexico City and Guadalajara are most likely to be drawn to cruising. Six in 10 target travelers from Mexico City (60.2%) and Guadalajara (58.0%) are in the market for cruising, compared with 49.8% of travelers from Monterrey (Exhibit IV-17).

EXHIBIT IV-17. TRAVELERS IN THE MARKET FOR CRUISING—BY CITY
(TARGET TRAVELERS FOR CANADA)



WHAT THEY LIKE TO DO ON TRIPS

When on an international trip, target travelers are inclined to participate in a broad range of activities (Exhibit IV-18). A trip to Canada would allow them to indulge in many different activities, including trying the local cuisine, ambling around to soak in the ambiance, and visiting museums and art galleries.

EXHIBIT IV-18. LIKELIHOOD OF ENGAGING IN SELECTED
ACTIVITIES ON A TRIP OUTSIDE OF MEXICO
(TARGET TRAVELERS FOR CANADA)

	Highly Likely	Somewhat Likely
Spend a few days at a beach	70.3%	24.3%
Go shopping	65.8	26.3
Try local cuisine	62.7	27.5
Walk around and soak in the ambiance of a place	58.2	29.2
Visit sites of historical interest	54.2	35.2
Go to amusement or theme parks	51.0	35.1
Visit museums or art galleries	47.2	37.1
Eat at a well-known restaurant	44.1	38.0
Go to nightclubs, dancing, etc.	41.4	31.3
Visit national parks and wilderness areas	41.1	40.3
Attend a sporting event	36.2	32.9
Go to a casino, gamble	28.4	23.4
Go to the opera or ballet	22.7	28.5
Tour a winery	21.5	28.7

(Number of respondents = 789-790)



**V ATTITUDES
TOWARD CANADA**

HIGHLIGHTS

- Canadian culture, both traditional and contemporary, is a big draw for upscale Mexican travelers. On a trip to Canada, many target travelers would enjoy visiting museums and art galleries, attending cultural events and festivals, and experiencing Canada's aboriginal cultures.
- Mexican travelers show a great appreciation for Canada's scenery and an eagerness to explore it through a number of outdoor activities.
- Cold winter weather is not a deterrent for target travelers; the majority would be willing to visit Canada at any time of year. They also demonstrate strong interest in trying winter activities, such as dogsledding and skiing.
- Although target travelers have exceedingly positive perceptions of Canada, they also demonstrate an important lack of awareness about the activities and attractions that Canada offers.

PERCEPTIONS OF CANADA

Mexican travelers have very positive perceptions of Canada. When asked to rate Canada on a number of dimensions, target travelers give high ratings. They award the best ratings for outdoor sports and activities (Exhibit V-1). Canada also fares particularly well in terms of hotels, entry requirements, variety of things to do, and quality of service. Their rating of convenient air service is quite high, considering the relative dearth of non-stop flights to Canada.

EXHIBIT V-1. TARGET TRAVELERS RATING CANADA AS “EXCELLENT” ON SELECTED DIMENSIONS

	All Target Travelers	Previous Visitors to Canada	Rank among Previous Visitors
Outdoor sports and activities	41.7%	50.1%	7
Hotels	36.9	52.4	5
Entry requirements	36.0	59.9	1
Variety of things to do	35.9	53.3	4
Quality of service	35.1	59.0	2
Friendly to Mexicans	31.9	55.0	3
Dining/restaurants	31.8	48.9	8
Convenient air service from Mexico	30.5	50.4	6
Historical attractions	29.5	46.6	9
Shopping	25.5	40.1	10
Nightlife/entertainment	24.3	37.9	11
(Number of respondents)	(789-791)	(182-184)	

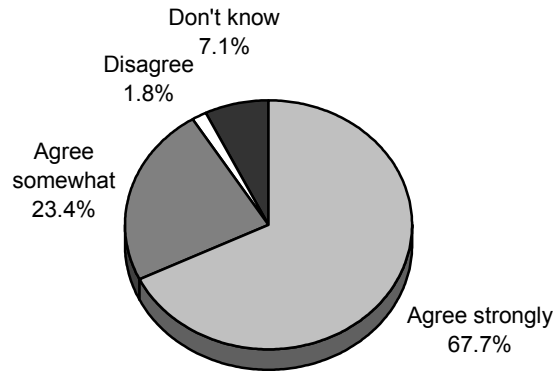
Target travelers who have previously visited Canada were clearly satisfied by their experiences. They give higher ratings to each of the dimensions listed in our survey. Entry requirements, quality of service, and friendliness to Mexicans receive considerably higher marks from previous visitors.

Mexicans view Canada as a welcoming destination with good service; however, they rate Canada less favorably for shopping, historical attractions, and entertainment. Because Mexicans enjoy these activities when traveling internationally, these areas could benefit from further promotional efforts in Mexico.

SAFETY

Canada has an excellent reputation for safety—91.1% of target travelers agree with the statement “Canada is a safe country in which to travel” (Exhibit V-2). This reputation places Canada in an enviable position relative to other places.

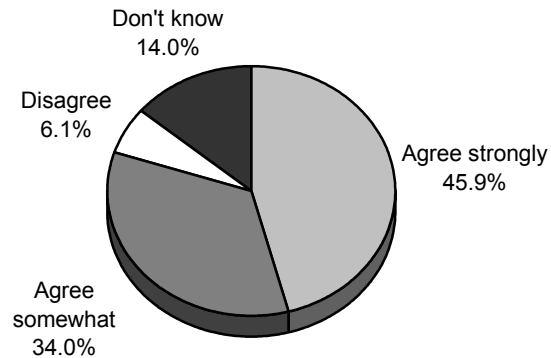
EXHIBIT V-2. “CANADA IS A SAFE COUNTRY IN WHICH TO TRAVEL”
(TARGET TRAVELERS FOR CANADA)



VALUE FOR THE MONEY

The majority of target travelers agree that “Overall, Canada offers good value for the money” (Exhibit V-3). The perception of Canada as an affordable destination is surely influenced by the economic incentive created by the relative weakness of the Canadian dollar.

EXHIBIT V-3. “OVERALL, CANADA OFFERS GOOD VALUE FOR THE MONEY”
(TARGET TRAVELERS FOR CANADA)



Target travelers are divided when asked specifically about the cost of getting to Canada—44.1% agree in some measure with the statement “The cost of the airfare to get to Canada puts me off,” 47.9% disagree in some measure, and 8.0% don’t know.

WHAT THEY WOULD ENJOY IN CANADA

On a trip to Canada, target travelers would enjoy many different types of activities, including those associated with traditional touring and those focused on the everyday life of the destination (Exhibit V-4).

EXHIBIT V-4. SELECTED ACTIVITIES TARGET TRAVELERS WOULD ENJOY ON A TRIP TO CANADA

Relaxing in a sidewalk café	84.4%
Shopping	81.1
Traditional touring activities (museums, art galleries, music, dance)	78.1
Attending a cultural event/festival	76.7
Experiencing aboriginal culture	48.9
Visiting a spa	46.2

(Number of respondents = 789-790)

URBAN SOPHISTICATION

Mexican travelers enjoy visiting dynamic, high-profile cities and believe that Canada has vibrant urban centers. Nearly two-thirds of target travelers (64.9%) strongly agree with the statement “Canada has sophisticated and culturally interesting cities”; a further 24.3% agree somewhat.

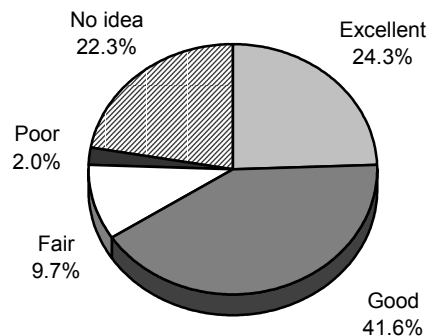
Mexican travelers would enjoy a range of activities that would allow them to experience Canadian cities. For instance, 84.4% would enjoy relaxing in a sidewalk café, giving them an opportunity to observe the local people and experience the ambiance of the city they are visiting.

Mexicans are gregarious people, and they commonly seek out good food and local entertainment on their trips. Almost all target travelers would want to sample local specialties on their international trips. Most (82.1%) are at least somewhat likely to patronize a well-known restaurant; 44.1% are highly likely to do so. Mexican travel-

ers rate Canada’s restaurants very favorably; 79.3% believe Canada has “excellent” or “good” restaurants.

Many Mexicans enjoy dancing and nightclubs. Canada has a fairly good image among Mexican travelers when it comes to nightlife. Two-thirds of Mexican travelers (65.9%) rate Canada as “excellent” or “good” for nightlife and entertainment (Exhibit V-5).

EXHIBIT V-5. “HOW DOES CANADA RATE?”—NIGHTLIFE/ENTERTAINMENT (TARGET TRAVELERS FOR CANADA)



SHOPPING

Shopping motivates many Mexicans to travel internationally. In fact, one-third of Mexican travelers (32.4%) have taken an international trip in the previous 12 months primarily for shopping. These travelers are more likely to be women and residents of Monterrey.

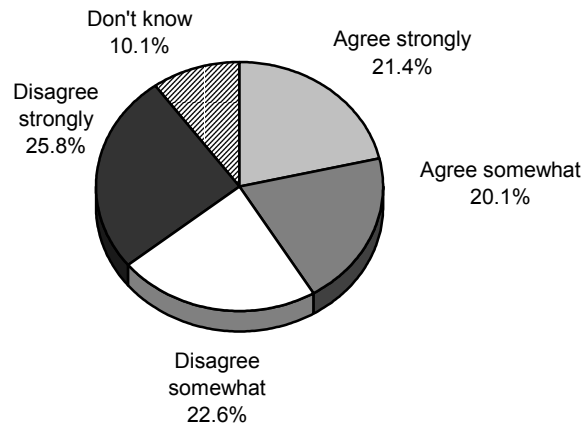
Shopping is one of the main reasons many Mexicans visit the United States. They are attracted to the wide range of merchandise available at lower prices than they can find in Mexico. Canada also stands to profit from Mexican travelers’ passion for shopping. About 8 in 10 (81.1%) target travelers would enjoy shopping while on a trip to Canada. When asked how Canada rates for shopping, three-quarters (75.2%) of them responded “excellent” or “good.”

CULTURAL ACTIVITIES

More than three-quarters of target travelers would enjoy visiting Canadian museums or art galleries and experiencing the music and dance of Canada (78.1%), as well as attending a cultural event or festival (76.7%). Further, about half (48.9%) would enjoy an activity that would allow them to experience Canada’s aboriginal cultures.

Canada offers visitors a chance to experience two distinct cultures and languages—English and French. Given Mexicans’ fondness for France, it is surprising that only 4 in 10 target travelers (41.5%) agree with the statement “The French influence is one of the key reasons for visiting Canada” (Exhibit V-6). Mexicans who speak French are more inclined to agree with this statement.

EXHIBIT V-6. “THE FRENCH INFLUENCE IS ONE OF THE KEY REASONS FOR VISITING CANADA”
(TARGET TRAVELERS FOR CANADA)



EXPERIENCES FOR CHILDREN

Mexican travelers appreciate destinations that accommodate the interests of their entire traveling party. Target travelers say almost unanimously (91.7%) that “Canada is a good destination for the whole family”; 69.8% agree strongly.

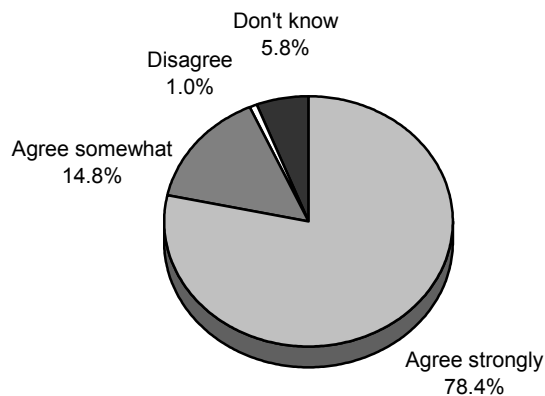
Mexican travelers with young children are fond of visiting amusement or theme parks on their international vacations. In fact, 9 of 10 target travelers who have children younger than 18 living at home (90.4%) say they are at least somewhat likely to go to an

amusement or theme park on a trip outside of Mexico. More than half (57.3%) would be highly likely to do so. American theme parks are an especially strong draw for Mexican families. Although Canada is unlikely to be able to compete directly with the United States in the market for trips built around theme parks, attractions such as Paramount Canada's Wonderland could certainly appeal to family travelers as a part of a trip to Canada.

NATURE AND THE OUTDOORS

Although comparatively few would take a trip focused on ecology and nature, Mexicans do enjoy getting close to nature; 81.4% of target travelers would be likely to visit national parks and wilderness areas on a trip outside of Mexico. A trip to Canada would cater to Mexicans' interest in nature and the outdoors. Target travelers are united in the belief that Canada has spectacular scenery; 93.2% agree strongly or somewhat (Exhibit V-7).

EXHIBIT V-7. "CANADA HAS SPECTACULAR SCENERY"
(TARGET TRAVELERS FOR CANADA)



Only 25.2% of target travelers say they would be highly likely to take an international trip built around an outdoor activity; however, the majority of target travelers would be either highly or somewhat likely to hike, swim, or bicycle on their international trips (Exhibit V-8).

EXHIBIT V-8. LIKELIHOOD OF ENGAGING IN SELECTED OUTDOOR AND SPORTS ACTIVITIES ON A TRIP OUTSIDE OF MEXICO (TARGET TRAVELERS FOR CANADA)

	Highly Likely	Somewhat Likely
Hiking	38.5%	36.6%
Swimming	33.0	31.3
Bicycling	25.8	30.6
Scuba diving	16.6	19.4
Snow skiing	16.6	21.8
Tennis	14.8	27.3
Fishing	12.9	21.5
Rafting or kayaking	10.8	18.0
Golf	8.0	20.3

(Number of respondents = 789-791)

On a trip to Canada, many target travelers would enjoy whale watching. Many would also like to go hiking, kayaking, and canoeing (Exhibit V-9).

EXHIBIT V-9. SELECTED OUTDOOR ACTIVITIES TARGET TRAVELERS WOULD ENJOY ON A TRIP TO CANADA

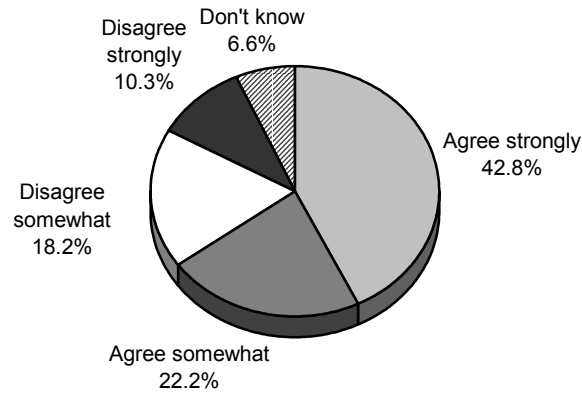
Whale watching	69.1%
Hiking	61.5
Trying a winter activity like skiing or dogsledding	58.0
Downhill skiing	44.2
Kayaking/canoeing	32.7
Cross country skiing	31.0

(Number of respondents = 789-790)

WINTER ACTIVITIES

Mexican travelers are not “afraid” of Canada’s cold winter weather. In fact, the majority are intrigued by the exotic activities and experiences that Canada’s winter climate can offer. Most target travelers (58.0%) would enjoy trying skiing or dogsledding while on a trip to Canada. Their willingness to brave the Canadian winter is confirmed by their readiness to visit Canada at any time of year; nearly two-thirds (65.0%) of target travelers would do so (Exhibit V-10).

EXHIBIT V-10. "I WOULD VISIT CANADA AT ANY TIME OF YEAR"
(TARGET TRAVELERS FOR CANADA)

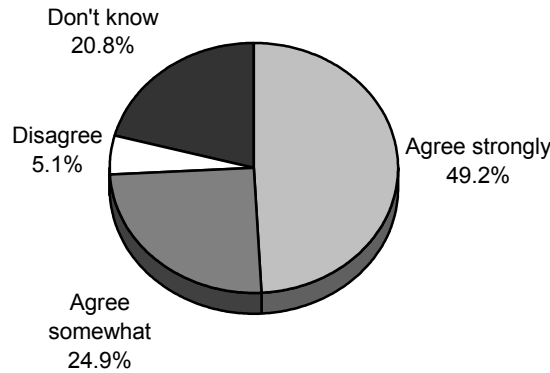


Snow skiing has become very popular among Mexico's international traveler population. In the past 12 months, 3.4% of all target travelers for Canada took a ski vacation outside of Mexico.

Roughly 4 in 10 (38.4%) are at least somewhat likely to ski on an international vacation; 16.6% say they are highly likely to do so. More specifically, almost half (45.9%) of target travelers would enjoy trying either downhill or cross country skiing while visiting Canada; 3 in 10 (29.3%) say they would enjoy trying both types of skiing.

Many wealthy Mexicans have had condominiums in Vail for many years. As a result, Vail is the best-known and most prestigious ski resort for Mexicans. Recently, however, many Mexicans have been finding their way to Canada for skiing and other winter sports. Mexican travelers believe Canada is a first-rate skiing destination; three-quarters (74.1%) of target travelers agree with the statement "Canada has high-quality skiing"; half (49.2%) agree strongly (Exhibit V-11). This positive perception confirms the opportunities that upscale Mexican travelers present for resorts such as Whistler and Mt. Tremblant.

EXHIBIT V-11. "CANADA HAS HIGH-QUALITY SKIING"
(TARGET TRAVELERS FOR CANADA)



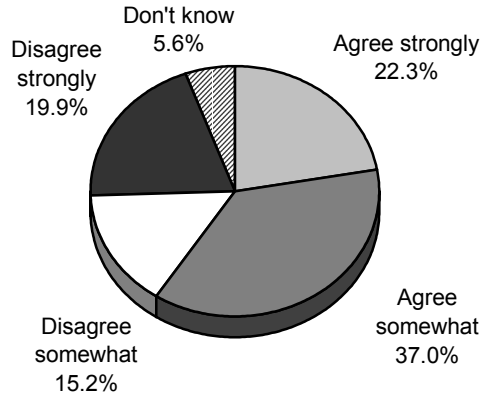
OBSERVATIONS

Mexican travelers see Canada as a destination with much to offer them. Their perceptions are exceedingly positive. However, target travelers' overall awareness of Canada leaves something to be desired. Lack of awareness is one important barrier that needs to be overcome if the country is to achieve its potential in Mexico.

As an example, one in five don't know whether Canada is good value as a destination, or how it rates for friendliness to Mexicans and quality of service. At least one in eight are unsure how Canada rates for shopping, historical attractions, hotels, dining and restaurants, outdoor sports and activities, and variety of things to do.

The majority (59.3%) of Mexican travelers acknowledge this lack of awareness, agreeing in some measure with the statement "I know very little about traveling in Canada" (Exhibit V-12). In our view, education is key to attracting more upscale Mexican travelers to Canada.

EXHIBIT V-12. "I KNOW VERY LITTLE ABOUT TRAVELING IN CANADA"
(TARGET TRAVELERS FOR CANADA)





**VI TRANSPORTATION
& LODGING**

HIGHLIGHTS

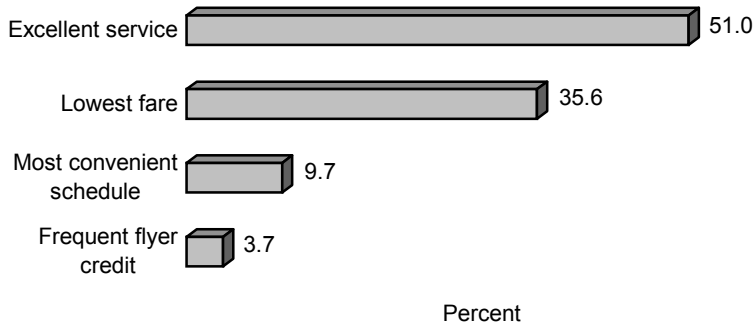
- Mexican travelers generally cite a reputation for excellent service as their most important criterion when selecting an airline for international travel.
- Generally speaking, carrier nationality is not an issue among Mexican international travelers. The majority of target travelers for Canada believe that Mexican and foreign airlines are about the same along a variety of dimensions, suggesting that domestic and foreign carriers have virtually equal opportunities in the marketplace.
- The majority of target travelers are familiar with the quality of international service provided by Air Canada. Canada’s flag carrier receives the fourth highest combined score of “good” or “excellent” for international service.
- To assure themselves of a high-quality travel experience, Mexican travelers tend to gravitate to the more recognized and expensive car rental and hotel brands.

AIR TRAVEL

AIRLINE SELECTION CRITERIA

Mexican target travelers cite a reputation for excellent service and the lowest fare as their most important criteria when selecting an airline for international travel (Exhibit VI-1). That only 3.7% mention frequent flyer credit is probably related to the fact that frequent flyer program participation is comparatively low in Mexico. Only 16.7% of international travelers belong to a frequent flyer program; among these, 16.7% mention mileage credit in a frequent flyer program as the most important factor in airline selection.

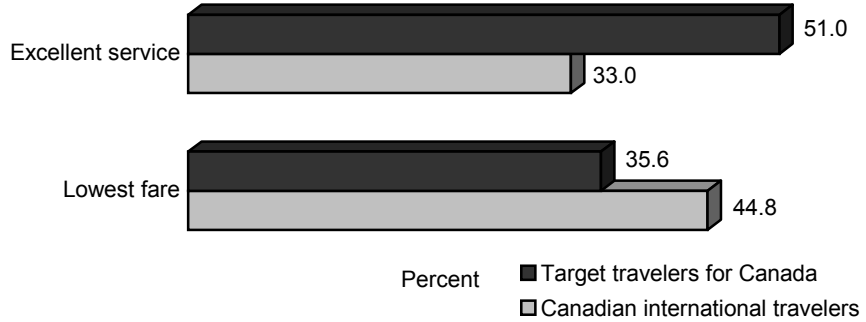
EXHIBIT VI-1. MOST IMPORTANT FACTOR IN AIRLINE SELECTION
(TARGET TRAVELERS FOR CANADA)



Package and group travelers are considerably more likely to select a carrier on the basis of its reputation for service; impromptu travelers are the most price conscious.

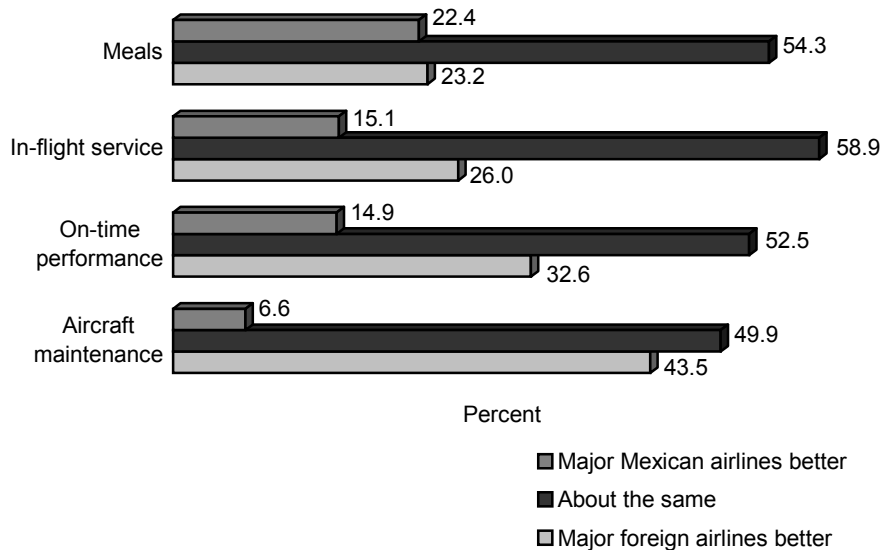
The relative value that target travelers place on service and fare is especially noteworthy as compared with travelers from Canada. Mexicans are one and a half times as likely as Canadians to select airlines on the basis of service; by contrast, Canadian travelers emphasize cost (Exhibit VI-2). This finding aligns with the high value that many Mexican travelers place on comfort and convenience on their vacations.

EXHIBIT VI-2. MOST IMPORTANT AIRLINE SELECTION FACTOR—MEXICAN VERSUS CANADIAN TRAVELERS



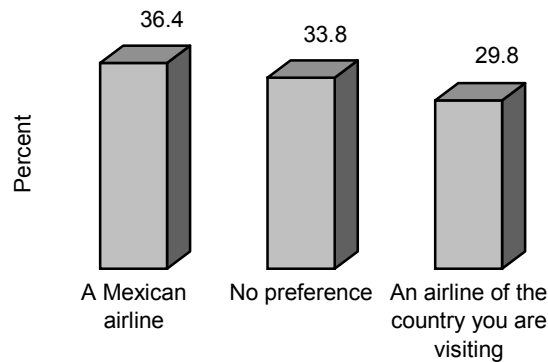
Carrier nationality is not an issue among Mexican international travelers. The majority of target travelers believe that Mexican and foreign airlines are about the same along a variety of dimensions, suggesting that domestic and foreign carriers have virtually equal opportunities in the marketplace. Generally speaking, Canada’s target travelers consider foreign airlines to be slightly superior with respect to aircraft maintenance, on-time performance, and in-flight service (Exhibit VI-3).

EXHIBIT VI-3. COMPARISON OF MAJOR MEXICAN AIRLINES WITH MAJOR FOREIGN AIRLINES (TARGET TRAVELERS WHO EXPRESS AN OPINION)



In fact, when taking an international trip, 33.8% of target travelers express no preference between a Mexican airline and an airline of the country they are visiting (Exhibit VI-4). Slightly more (36.4%) say they generally prefer to fly a Mexican airline, while 29.8% prefer an airline of the country they are visiting.

EXHIBIT VI-4. PREFERENCE FOR MEXICAN AIRLINES OR FOREIGN AIRLINES
(TARGET TRAVELERS FOR CANADA)



PERCEPTIONS AND RATINGS OF CARRIERS

The vast majority of target travelers are familiar with the quality of international service provided by the national carriers; almost all target travelers have an idea of what Aeromexico and Mexicana would be like for international travel (Exhibit VI-5). The most widely known foreign airline—American Airlines—lags well behind.

A considerable percentage of target travelers have no awareness of many foreign carriers. Target travelers for Canada are least certain about what it would be like to fly internationally on the Central and South American airlines in our survey.

Air Canada ranks very well among target travelers. Canada’s flag carrier receives the fourth highest combined score of “good” or “excellent” for international service among target travelers, below Air France, American Airlines, and Aeromexico (Exhibit VI-6).

EXHIBIT VI-5. TARGET TRAVELERS HAVING AN IDEA OF WHAT SELECTED CARRIERS WOULD BE LIKE FOR INTERNATIONAL TRAVEL

Aeromexico	98.1%
Mexicana	94.2
American Airlines	80.5
Continental Airlines	68.9
United Airlines	67.4
Delta Air Lines	59.9
Air Canada	58.6
British Airways	56.7
Air France	56.3
Iberia	55.6
America West	54.4
Northwest Airlines	53.0
Grupo Taca	42.8
Lan Chile	38.8

(Number of respondents = 789-791)

EXHIBIT VI-6. TARGET TRAVELERS RATING SELECTED CARRIERS FOR INTERNATIONAL TRAVEL*

	“Excellent” or “Good”	“Excellent”
Air France	90.1%	32.1%
American Airlines	88.8	41.9
Aeromexico	88.1	32.4
Air Canada	87.0	21.6
British Airways	85.9	32.1
United Airlines	85.0	32.8
Mexicana	84.1	30.3
Continental Airlines	82.6	32.2
Northwest Airlines	75.2	15.5
America West	73.1	17.9
Delta Air Lines	73.1	20.7
Iberia	60.1	13.4
Lan Chile	50.3	8.5
Grupo Taca	41.7	4.4

(Number of respondents = 306-774)

* Among those who have an opinion of the carrier.

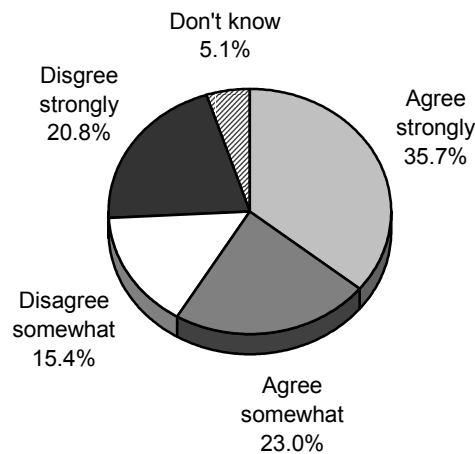
CAR RENTALS

Roughly one in four target travelers (23.6%) rented a car on their most recent international trip. Those who traveled with custom (30.4%) and package (30.2%) arrangements were more likely to have done so; by comparison, impromptu travelers (14.2%) rented cars in much lower numbers.

Target travelers whose most recent international trip was primarily for vacation were more likely to rent a car than those who traveled primarily to visit family; 25.3% of vacation travelers rented a car, compared with 14.3% of those who visited family.

Nearly two-thirds (63.5%) of target travelers for Canada say they typically arrange their rental car reservations before they begin their trip. As an example of their predilection for more recognized brands, 58.7% agree at least somewhat that they would be willing to pay more to rent from a major company like Hertz or Avis; 35.7% agree strongly (Exhibit VI-7).

EXHIBIT VI-7. "IF I WERE TO RENT A CAR, IT WOULD BE WORTH A FEW EXTRA DOLLARS TO RENT FROM ONE OF THE MAJOR COMPANIES LIKE HERTZ OR AVIS"
(TARGET TRAVELERS FOR CANADA)

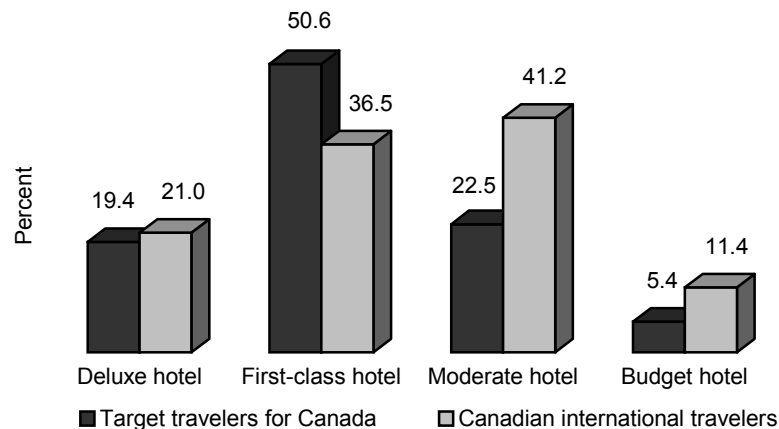


LODGING

Mexican travelers' preference for high-quality accommodations further reveals the value they place on comfort and convenience and their desire to treat themselves and their families to the best they can afford. Half (50.6%) of target travelers who stayed in a hotel on their most recent international trip patronized a first-class hotel; one in five opted for a deluxe property (Exhibit VI-8). Surprisingly, given their inclination to travel in groups, only 3.6% stayed in a "suites hotel."

By comparison, Canadian international travelers are substantially more likely to stay at moderate and budget properties. The implication, of course, is that Mexican travelers—like many upscale Latin Americans—are an excellent market for the higher-priced and better-known individual hotels and hotel chains.

EXHIBIT VI-8. CLASS OF HOTELS USED ON MOST RECENT INTERNATIONAL TRIP*†



* Among target travelers who stayed in a hotel on their most recent international trip.

† Percentages add to more than 100 because travelers may have stayed in more than one type of hotel on their most recent trip.

More than 3 in 10 target travelers (31.6%) chose other forms of lodging on their most recent trip outside of Mexico, including homes of relatives or friends, or their own family vacation homes (Exhibit VI-9).

EXHIBIT VI-9. TYPE OF LODGING USED ON
MOST RECENT INTERNATIONAL TRIP*

The home of relatives	61.5%
The home of friends	15.6
Family vacation home	13.7
Time-share condominium	4.4
Cruise ship	2.9
Rental condominium	1.5
Other	3.4

(Number of respondents = 204-205)

* Among target travelers who did not stay in
a hotel on their most recent international trip.



**VII THE PLANNING
PROCESS**

HIGHLIGHTS

- The decision of where to visit when traveling outside of Mexico is often shared. Indeed, almost half of Canadian target travelers credit others with having influenced where they went on their most recent international trip.
- Personal experience—either their own or that of others—is a key factor in destination selection for vacation travelers. Cost considerations also play an important role.
- Mexicans are good candidates for quick-response promotions. Short planning and booking lead times are the norm for Mexican travelers. Half decided on their destination less than four weeks before their departure; three-quarters purchased their airline tickets in this period.
- Mexican travelers' use of travel agents is amazingly low; only one-third used an agent to help them arrange their most recent international trip.
- Penetration of the Internet among upscale Mexican travelers is quite high; three-quarters currently have access to the Internet. However, very few use the Internet for travel-related purposes.
- Newspapers do a better job of penetrating the Mexican market than magazines. Moreover, cable television is big in Mexico, making it a medium worth investigating as a promotional vehicle.

THE DECISION TO TRAVEL

Because Mexicans often travel with other family members or friends, the decision of where to go when traveling outside of Mexico is often shared. Indeed, almost half of vacation travelers credit others with having influenced where they went on their most recent international trip; only 54.9% say that they themselves were among those with the most influence on the destination selection (Exhibit VII-1). Roughly one in three (31.1%) credit their spouse or partner, while 25.1% say that either parents (11.8%) or other relatives (13.3%) had a strong influence on destination selection. One in nine (12.5%) credit friends; 7.4% credit their children.

EXHIBIT VII-1. PERSONS WITH THE MOST INFLUENCE ON THE DESTINATION SELECTION ON MOST RECENT INTERNATIONAL VACATION TRIP (TARGET TRAVELERS FOR CANADA)

Respondent	54.9%
Spouse/partner	31.1
Children under 18	2.4
Children under 12	1.5
Children 12 to 17	0.9
Grandchildren under 18	0.9
Children 18 or older	6.6
Parents	11.8
Other relative(s)	13.3
Other couples	0.0
Friends	12.5
Other	0.2

(Number of respondents = 456-457)

Mexicans who traveled to visit family are slightly less likely than vacation travelers to credit themselves with the destination selection. Half (51.6%) of those who traveled primarily to visit family say they themselves influenced where they went on their most recent international trip, compared with 54.9% of vacation travelers. Men are also less likely than women to credit themselves; 52.1% of men do so, compared with 56.9% of women.

INFLUENCING FACTORS IN DESTINATION SELECTION

Mexicans tend to consider a wide range of factors when choosing a destination for an international vacation. Four in 10 (39.6%) cite personal experience—either their own (28.0%) or that of others (13.0%)—as influential factors in destination selection for their most recent trip (Exhibit VII-2).

EXHIBIT VII-2. FACTORS THAT INFLUENCED CHOICE OF DESTINATION ON MOST RECENT INTERNATIONAL TRIP* (TARGET TRAVELERS FOR CANADA)

	Traveled Primarily for Vacation	Traveled Primarily to Visit Family
Especially good fare or package	31.3%	14.6%
A previous visit	28.0	17.5
Offers something for the whole family	18.7	6.9
Having family living there	16.8	76.5
Having friends living there	15.6	13.6
Talking to someone who had been there	13.0	6.8
Favorable exchange rate	10.3	0.0
Recommendation of travel agent	8.1	5.8
Information on Internet	5.0	4.9
Magazine or newspaper advertisement	5.9	2.9
Television advertisement	2.8	6.8
A movie or book	2.6	3.9
Editorial/article in a magazine or newspaper	1.8	3.9
Unsolicited literature received in the mail	0.7	0.0
(Number of respondents)	(545-546)	(102-103)

* For personal reasons.

Many consider cost; 37.5% of vacation travelers cite cost factors—either an especially good fare or package or a favorable exchange rate—as influencing their choice of destination for their most recent international trip.

Only 16.8% of vacation travelers cite having family living there as influencing their choice of destination for their last trip. Not surprisingly, 76.5% of travelers whose most recent international trip was primarily to visit family cite this as an influential factor in destination selection.

Only 7.9% of those whose most recent international trip was primarily for vacation say that some sort of advertising (magazine, newspaper, television, etc.) influenced their choice of destination. Interestingly, a similar number of those who traveled primarily to visit family say the same.

Only a handful of travelers say that unsolicited literature received in the mail influenced their destination selection. Direct mail solicitations, after a relatively late start, are increasing in Mexico.

PLANNING AND BOOKING LEAD TIME

Perhaps one of the most distinctive characteristics of Mexican travelers is that when it comes to planning and booking travel, they have comparatively short lead times. Half (49.6%) decided on the destination within four weeks of departure (Exhibit VII-3). In fact, 28.1% decided on the destination within two weeks of departure. Similarly, 31.4% set the date for their trip and 41.3% purchased airline tickets within two weeks of departure. Mexicans' short planning and booking horizons make the country an excellent market in which to stimulate travel on short notice.

EXHIBIT VII-3. PLANNING AND BOOKING LEAD TIME FOR MOST RECENT INTERNATIONAL TRIP* (TARGET TRAVELERS FOR CANADA)

	Decided on the Destination	Set the Date for the Trip	Purchased Airline Tickets
Less than 2 weeks	28.1%	31.4%	41.3%
2 to 4 weeks	21.5	24.6	32.2
1 to 3 months	35.3	34.6	22.3
4 to 6 months	10.4	6.4	1.9
7 months or more	4.7	3.0	2.2
(Number of respondents)	(643)	(641)	(583)

* For personal reasons.

Global travelers have longer planning and booking horizons than U.S.-only travelers. For example, 60.2% of global travelers decided on their destination one or more months in advance of their departure, compared with 46.3% of U.S.-only travelers. Similarly, 29.8% purchased their airline tickets in the same period, compared with 24.5% of U.S.-only travelers.

Those target travelers who travel to visit family have only slightly shorter lead times than those who travel for vacation. For example, 33.7% of those who traveled primarily to visit family on their most recent trip decided on their destination less than two weeks before their departure, compared with 29.7% who traveled primarily for vacation.

SOURCES OF DESTINATION INFORMATION

Mexican travelers seem to give more credence to their own acquaintances than to other sources. When wanting to learn more about a place to visit, 65.9% of target travelers for Canada are highly likely to talk with people who have been to the destination, and 57.1% are highly likely to talk to a travel agent (Exhibit VII-4). Only about a third would contact a tourist office or the embassy of the country in question.

EXHIBIT VII-4. LIKELY SOURCES OF DESTINATION INFORMATION
(TARGET TRAVELERS FOR CANADA)

	<u>Highly Likely</u>	<u>Somewhat Likely</u>	<u>Not Likely</u>
Talk with people who have been there	65.9%	25.8%	8.4%
Ask a travel agent	57.1	30.0	12.9
Search the Internet	50.6	26.8	22.6
Obtain travel brochures	49.9	38.6	11.5
Look in travel magazines	44.3	41.4	14.2
Contact tourist offices or embassies	34.5	30.0	35.5

(Number of respondents = 785-790)

ROLE OF TRAVEL AGENTS

Although they are highly likely to contact a travel agent, Mexican travelers' use of agents is quite low. Only 33.5% of target travelers for Canada used a travel agent to help them arrange their most recent international trip. One reason may be the fact that Mexican travelers are very accustomed to calling the airlines directly or going to the city ticket office or airport ticket counter. Another is that many of them seem to prefer to handle their own arrangements, as discussed earlier.

Travel agent use correlates with trip purpose, destination visited, travel arrangement preference, and socioeconomic class.

- Target travelers whose most recent international trip was primarily for vacation are more likely than those who traveled primarily to visit family to use travel agents (35.0% versus 25.2%).
- More than one-quarter (28.7%) of target travelers who visited only the United States on their most recent international trip used agents, compared with 44.7% of those who went beyond the United States. In the case of Canada, more than half (54.5%) of those who visited Canada on their most recent trip used an agent in conjunction with that trip.¹⁰
- Use of travel agents is higher among group travelers (57.4%) than among package (47.3%), custom (38.0%), and impromptu travelers (15.6%).
- Class A/B travelers (36.4%) are more likely than class C+ travelers (29.9%) to use agents.

Among those target travelers for Canada who used an agent on their most recent international trip, 74.7% did so to purchase airline tickets or a group tour, vacation package, or cruise, or to arrange hotels or other lodging (Exhibit VII-5). Fewer than half (46.8%) used an agent for itinerary planning or to plan activities and choose attractions.

EXHIBIT VII-5. SERVICES FOR WHICH TRAVEL AGENTS WERE USED*

To purchase airline tickets	45.9%
To arrange hotels or other lodging	42.4
To plan itinerary	36.4
To help select the destination(s)	25.2
To plan activities and choose attractions	17.0
To purchase a group tour, vacation package, or cruise	15.1

(Number of respondents = 217-218)

* Among target travelers for Canada who used an agent for their most recent international trip taken for personal reasons.

¹⁰ Based on fewer than 100 respondents.

THE INTERNET

Penetration of the Internet among upscale Mexican travelers is quite high. *Online target travelers*—those who currently have access to the Internet—account for three-quarters (76.8%) of Canada’s target travelers.

However, only 16.2% of online target travelers used the Internet in conjunction with their most recent international trip. Most (54.3%) of them used it either to plan their itinerary or to plan activities and choose attractions. Only 23.5% used it to purchase airline tickets or to purchase travel components (Exhibit VII-6).

EXHIBIT VII-6. USES OF THE INTERNET*

To plan itinerary	38.3%
To arrange hotels or other lodging	37.0
To help select the destination(s)	28.4
To plan activities and choose attractions	27.2
To purchase airline tickets	20.0
To purchase a group tour, vacation package, or cruise	4.9

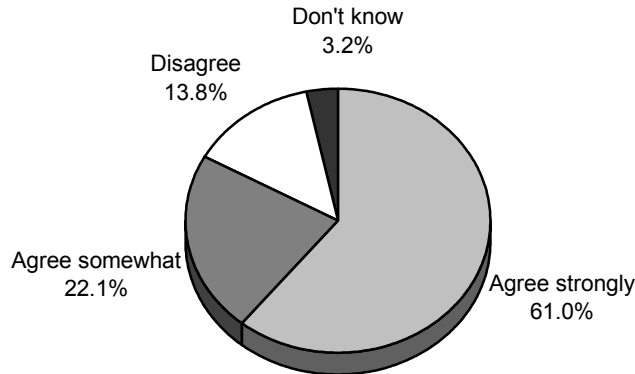
(Number of respondents = 80-81)**

* Among target travelers for Canada with Internet access who used the Internet for their most recent international trip taken for personal reasons.

** Caution: small sample size.

Mexican travelers’ reluctance to use the Internet to purchase travel may arise from their concerns with online security. Seven in 10 travelers who own a credit card (70.0%) agree with the statement “I would be reluctant to use my credit card on the Internet”; 47.4% agree strongly. In fact, only 20.8% have ever purchased anything (travel or anything else) on the Internet. Moreover, 83.1% agree with the statement “The Internet is fine for gathering information, but I would rather purchase through a travel agent or airline”; 61.0% agree strongly (Exhibit VII-7).

EXHIBIT VII-7. “THE INTERNET IS FINE FOR GATHERING INFORMATION, BUT I WOULD RATHER PURCHASE THROUGH A TRAVEL AGENT OR AIRLINE” (TARGET TRAVELERS FOR CANADA)



Online target travelers tend to be younger; 41.2% are under age 35, compared with 31.7% of non-Internet users. They are also overwhelmingly custom travelers; almost half (46.3%) traveled on a custom-designed itinerary with advance reservations during the majority of their most recent international trip (Exhibit VII-8). In comparison, 31.1% of non-Internet users traveled on a custom-designed itinerary.

EXHIBIT VII-8. TRAVEL ARRANGEMENTS OF ONLINE TRAVELERS AND NON-INTERNET USERS ON MOST RECENT INTERNATIONAL TRIP* (TARGET TRAVELERS FOR CANADA)

	Online Travelers	Non-Internet Users
Custom	46.3%	31.1%
Package	24.7	29.0
Impromptu	19.6	27.3
Group	9.4	12.6
(Number of respondents)	(607)	(183)

* For personal reasons.

E-mail has emerged as a viable and potentially lucrative means of reaching prospective travelers. The Mexican market is no exception: 63.0% of target travelers for Canada have an e-mail address. Of those, 66.7% say they would like to receive information on special travel offers via e-mail. However, caution is needed; electronic

junk mail concerns are increasingly clouding the future of e-mail marketing.

TRADITIONAL CONSUMER MEDIA

NEWSPAPERS

Newspapers do a good job of penetrating the Mexican market; 92.4% of travelers regularly read at least one of the newspapers listed in our survey.

El Universal and *Reforma* are the top two newspapers in Mexico City; 83.8% of Canada's target travelers who reside in Mexico City read one or both (Exhibit VII-9). In Guadalajara, *El Informador* is the top newspaper; 59.4% of target travelers who reside in Guadalajara read this newspaper. In Monterrey, one newspaper stands head and shoulders above the rest; *El Norte* is read by 90.2% of target travelers who reside in Monterrey.

EXHIBIT VII-9. NEWSPAPER READERSHIP—BY CITY
(TARGET TRAVELERS FOR CANADA)

Mexico City		Guadalajara	
El Universal	57.1%	El Informador	59.4%
Reforma	49.0	El Público	26.4
El Financiero	25.5	El Occidental	23.6
La Jornada	24.1	El Mural	23.1
Excelsior	18.0	El Ocho Columnas	18.4
Novedades	14.6		
La Prensa	9.9	Monterrey	
Milenio	8.8	El Norte	90.2%
Uno Más Uno	8.8	Milenio Diario de Monterrey	8.2
Esto	3.1	El Metro	6.3
		El Sol de Monterrey	3.1
		Extra	0.4

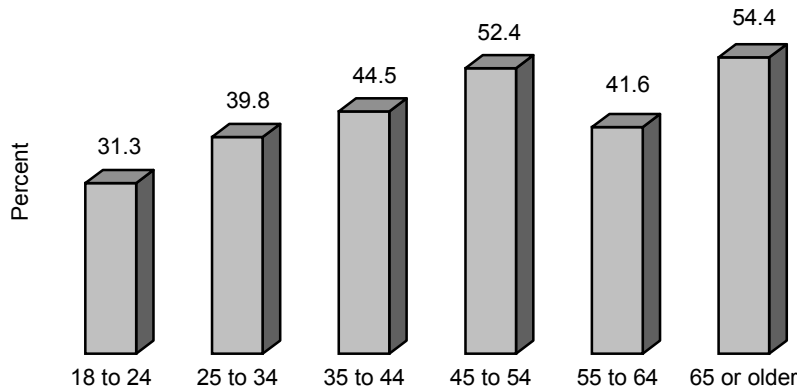
(Number of respondents = 212-294)

The travel section of local newspapers has become an important avenue for travel marketers to showcase their travel products and services. In Mexico, the top newspapers in each market—*El Universal*, *Reforma*, *El Informador*, and *El Norte*—all have a weekly international travel section.

Four in nine Mexican travelers (43.3%) regularly read the travel section of their local newspaper. Target travelers in Monterrey (46.3%) and Mexico City (42.9%) exhibit the highest readership of the local newspaper’s travel section. Only 30.2% of Canada’s target travelers in Guadalajara say they regularly read the travel section of their local newspaper.

Readership of the travel section is more likely among older travelers (Exhibit VII-10). Nevertheless, 3 in 10 travelers under 25 regularly read the travel section.

EXHIBIT VII-10. READERSHIP OF TRAVEL SECTION OF LOCAL NEWSPAPER—BY AGE (TARGET TRAVELERS FOR CANADA)



MAGAZINES

Almost all Mexican international travelers (90.1%) read at least one of the magazines listed in our survey (Exhibit VII-11). However, there is no one magazine that reaches a majority of travelers. *National Geographic en español* and *Muy Interesante* are read regularly by more than 3 in 10 Mexican travelers; no other magazine is read regularly by as many as one-quarter of travelers.¹¹ Two other magazines—*Cosmopolitan* and *Vanidades*—each reach more than one-fifth of travelers.

Men’s Health, *Conozca Más*, and *Proceso* are more effective in reaching men, while *Cosmopolitan*, *Vanidades*, *Kena*, *Eres*, *Vogue*, and *Tu* are more widely read among women.

¹¹ Survey respondents were not given a definition of regular readership; rather, they were allowed to self-define the term.

Readership of most magazines listed in our survey is highest in Mexico City.¹² For example, 48.3% of target travelers who reside in Mexico City read *National Geographic en español*; 44.9% read *Muy Interesante*. Furthermore, in addition to the magazines that reach more than one-fifth of all target travelers, five other magazines—*Proceso*, *Conozca Más*, *Contenido*, *Quo*, and *Men's Health*—reach more than one-fifth of target travelers who reside in Mexico City.

EXHIBIT VII-11. MAGAZINE READERSHIP
(TARGET TRAVELERS FOR CANADA)

	All Travelers	Men	Women
National Geographic en español	33.6%	35.8%	31.2%
Muy Interesante	32.7	33.2	32.1
Cosmopolitan	24.4	10.0	40.7
Vanidades	23.6	6.7	42.6
Conozca Más	18.0	20.3	15.4
Proceso	17.4	19.1	15.6
Quo	14.9	17.4	12.1
Milenio	14.6	15.8	13.2
Contenido	14.5	14.3	14.8
Men's Health	14.0	22.4	4.6
Eres	12.5	7.7	18.0
Kena (any)	12.0	1.7	23.7
Vogue	10.6	5.0	17.0
Geomunda	7.6	7.6	7.5
Padres e Hijos	7.6	6.0	9.4
Vuelo*	6.5	6.2	6.7
GQ	4.8	6.2	3.2
Tu	4.6	1.2	8.3
Travel and Leisure*	3.8	4.5	3.0
Fama	3.0	1.7	4.6
Escala*	2.9	4.3	1.6
Bon Vivant	1.6	1.9	1.3
Condé Nast*	0.8	1.0	0.5
La Onda	0.3	0.2	0.3
Read none of the listed magazines	9.9	11.7	7.5
(Number of respondents)	(790-791)	(418-419)	(371-372)

* Travel magazine.

¹² *Vanidades* is the notable exception; 36.8% of target travelers who reside in Guadalajara read *Vanidades*, compared with 22.8% of those who reside in Mexico City.

Mexicana’s in-flight magazine, *Vuelo*, is the most popular of the travel magazines; however, even it is read regularly by only 6.5% of Canada’s target travelers.

CABLE TELEVISION

Cable television is big in Mexico. Eight in 10 Mexican target traveler households (82.8%) subscribe to cable television. In fact, among class A/B travelers, cable television subscription is even higher; 88.0% of class A/B travelers subscribe to cable television. As in the Brazilian market, we believe that the high penetration of cable television makes this a medium worth investigating as a promotional vehicle in Mexico.

CREDIT/CHARGE CARDS

More than two-thirds (68.2%) of Canada’s target travelers have a major credit or charge card; 21.6% own two or more brands of cards, and 6.3% own at least three.

Visa is the most popular card among Mexican international travelers (Exhibit VII-12). MasterCard and American Express also garner high ownership. Not surprisingly, credit card ownership is higher among class A/B travelers (70.1%) than among class C+ travelers (65.9%). Class A/B travelers exhibit higher rates of ownership for Visa, American Express, and Diners Club.

EXHIBIT VII-12. CREDIT CARD OWNERSHIP*
(TARGET TRAVELERS FOR CANADA)

	All Travelers	Class A/B	Class C+
Visa	37.0%	39.6%	33.8%
MasterCard	26.5	25.9	27.1
American Express	19.7	22.5	16.5
Diners Club	1.9	2.8	0.8
Discover	0.8	0.5	1.1
Other	11.0	10.4	11.7
None	31.8	29.9	34.1
(Number of respondents)	(789-790)	(432)	(357-358)

* Percentages add to more than 100 because some travelers hold more than one credit card.

Probably because most credit card companies in Mexico stipulate that holders must be employed, younger travelers are less likely to hold a credit card; only 47.3% of travelers under 25 own a major credit card, compared with 73.1% of those 25 or older. Men are only slightly more likely than women to hold a credit card (69.9% versus 66.3%).

PART III: BUSINESS TRAVEL



**VIII INTERNATIONAL
BUSINESS TRAVEL**

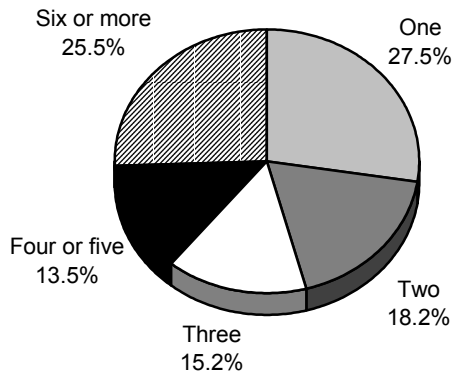
HIGHLIGHTS

- Mexicans who travel internationally for business tend to do so repeatedly. More than half of them took three or more trips outside Mexico for business in the past three years; two-fifths took four or more such trips in the same time period.
- International business travelers are more likely than pleasure-only travelers to be married, male, and residents of Monterrey.
- Almost all Mexican international business travelers went to either the United States or Canada on business in the past three years. Slightly more than a quarter traveled on business to another international destination.
- Business extender travel is common. Six of 10 international business travelers added two or more nights of vacation travel or took along their spouse or a companion other than a business associate on at least one business trip in the past three years.
- Nearly two-thirds of all Mexican international business travelers attended an international corporate meeting, association meeting, or convention in the past three years.
- International business travelers value low fares and a reputation for service when choosing between airlines. They are very familiar with the quality of international service offered by the major Mexican carriers; Aeromexico and Mexicana are both extremely well known and highly ranked.

MARKET COMPOSITION AND CHARACTERISTICS

Mexicans who travel internationally for business tend to do so repeatedly. About 7 in 10 (72.5%) took two or more business trips outside Mexico in the past three years; 54.2% took three or more (Exhibit VIII-1). *Frequent business travelers*—those who took four or more business trips outside Mexico in that period—account for 39.0%.

EXHIBIT VIII-1. NUMBER OF BUSINESS TRIPS OUTSIDE MEXICO TAKEN IN THE PAST THREE YEARS (INTERNATIONAL BUSINESS TRAVELERS)



Only 13.3% of Mexican international business travelers visited Canada in the past three years (Exhibit VIII-2). Among these, the majority (56.8%) took two or more business trips; 33.4% took three or more trips.

EXHIBIT VIII-2. NUMBER OF BUSINESS TRIPS TO CANADA TAKEN IN THE PAST THREE YEARS (INTERNATIONAL BUSINESS TRAVELERS)

Three or more	4.4%
Two or more	7.7
One	5.6
None	86.7

(Number of respondents = 338)

International business travelers are more likely than pleasure-only travelers to be married and male. For example, 66.4% of business

travelers are married, compared with 51.2% of pleasure-only travelers (Exhibit VIII-3). Men are overrepresented among international business travelers, accounting for 73.2% of the total.

Monterrey has the largest proportion of Mexican international business travelers, followed by Mexico City. Combined, these two cities account for 94.1% of business travelers. Monterrey's significance as a source of business travel is not surprising, given that it is the capital of the industrial state of Nuevo Leon and a major center for manufacturing, trade, finance, and education. Business is centered around the city's flourishing cement, glass, steel, and beer industries; its proximity to the Texas border offers an easy means for exporting goods to U.S. markets.

EXHIBIT VIII-3. PROFILE OF MEXICAN INTERNATIONAL BUSINESS AND PLEASURE-ONLY TRAVELERS

	Business Travelers	Pleasure-Only Travelers
Age		
18 to 24	13.9%	22.2%
25 to 34	18.6	20.9
35 to 44	20.6	16.5
45 to 54	28.9	16.5
55 to 64	9.7	12.8
65 or older	8.3	11.1
Socioeconomic class		
A/B	53.6	52.6
C+	46.4	47.4
Marital status		
Married	66.4	51.2
Not married	33.6	48.8
Gender		
Male	73.2	46.4
Female	26.8	53.6
City		
Monterrey	51.8	35.7
Mexico City	42.3	51.9
Guadalajara	5.9	12.4
(Number of respondents)	(338-339)	(702-703)

CREDIT CARD OWNERSHIP

Three-quarters (76.0%) of international business travelers have a major credit or charge card, compared with 60.5% of pleasure-only travelers. Three of 10 business travelers (29.8%) own two or more brands of cards, and 9.7% own at least three. Visa is by far the most popular card among international business travelers (Exhibit VIII-4). Frequent business travelers exhibit higher rates of ownership for every card, and substantially more for American Express.

EXHIBIT VIII-4. OWNERSHIP OF SELECTED CREDIT/CHARGE CARDS

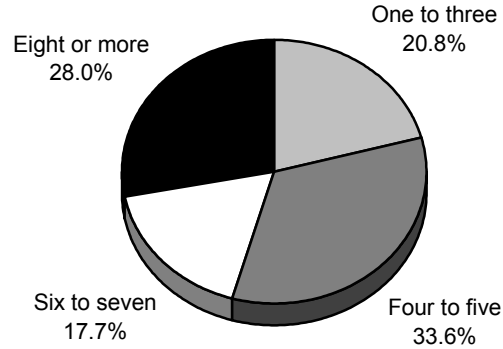
	International Business Travelers	Frequent Business Travelers
Visa	42.7%	51.6%
MasterCard	30.8	40.5
American Express	27.3	41.2
Diners Club	1.9	2.0
Discover	0.9	1.3
Other	13.0	14.9
None	24.0	14.7
(Number of respondents)	(338)	(132)

TRIP LENGTH

Eight in 10 international business travelers (79.2%) spent four or more nights away from home on their most recent business trip outside of Mexico; 28.0% were away from home for more than a week (Exhibit VIII-5).

On average, business travelers were away from home for nine nights on their most recent international business trip. Frequent business travelers are slightly more likely than other business travelers to have taken shorter trips, going away for an average of eight nights on their most recent trip.

EXHIBIT VIII-5. TOTAL NIGHTS SPENT AWAY FROM HOME ON MOST RECENT BUSINESS TRIP OUTSIDE OF MEXICO (INTERNATIONAL BUSINESS TRAVELERS)



DESTINATIONS

Almost all business travelers (92.1%) went to either the United States (87.0%) or Canada (13.3%) on business in the past three years (Exhibit VIII-6). Fewer than 3 of 10 (27.8%) traveled on business to another international destination.

Latin America (15.7%) and Europe (13.9%) attracted relatively small shares of international business travelers. Frequent business travelers visited almost every destination in substantially greater numbers than other international business travelers.

EXHIBIT VIII-6. INTERNATIONAL BUSINESS TRAVEL DESTINATIONS VISITED IN THE PAST THREE YEARS

	All International Business Travelers	Frequent Business Travelers
The United States	87.0%	92.4%
Europe	13.9	21.8
Canada	13.3	18.9
Central America	8.9	18.2
South America	8.6	15.9
The Caribbean	4.1	8.3
Asia	1.8	3.8
The Middle East	1.2	0.8
Oceania	0.6	0.8
Africa	0.0	0.0
(Number of respondents)	(338)	(132)

International business travelers from Monterrey (90.4%) are more likely than other international business travelers (82.9%) to have traveled to the United States on business in the past three years, undoubtedly because of the close border at Laredo, Texas (Exhibit VIII-7). Residents of Mexico City are more likely to have traveled on business to nearly every other international destination.

EXHIBIT VIII-7. INTERNATIONAL BUSINESS TRAVEL DESTINATIONS VISITED IN THE PAST THREE YEARS—BY CITY (INTERNATIONAL BUSINESS TRAVELERS)

	Monterrey	Mexico City	Guadalajara
The United States	90.4%	83.2%	82.5%
Canada	10.3	16.8	14.3
Europe	9.6	18.7	14.3
Central America	5.9	12.1	11.1
South America	5.9	12.1	7.9
The Caribbean	2.2	6.5	3.2
The Middle East	1.5	0.9	0.0
Asia	0.7	2.8	3.2
Oceania	0.7	0.9	0.0
Africa	0.0	0.0	0.0
(Number of respondents)	(136)	(107)	(63)*

* Caution: small sample size.

BUSINESS EXTENDER TRAVEL

Extending a business trip—either adding additional time for vacation travel or bringing a companion other than a business associate—is quite common in Mexico. The majority (56.9%) of international business travelers did so on at least one business trip in the past three years.

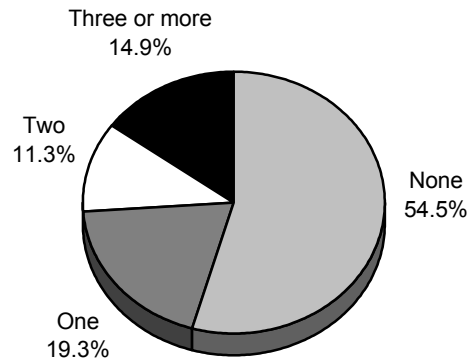
Nearly half (45.5%) of international business travelers added two or more nights of vacation travel to at least one business trip in the past three years; 26.2% did so two or more times (Exhibit VIII-8).

Generally, business extenders are more likely than other international business travelers to be young and of the upper socioeconomic class; 34.4% are between the ages of 18 and 34, compared with 30.9% of other business travelers (Exhibit VIII-9). Similarly,

56.5% are from class A/B, compared with 51.1% of other business travelers.

Frequent business travelers (52.6%) are more likely than other business travelers (40.8%) to add vacation travel to a business trip. Similarly, residents of Monterrey include a pleasure component at higher rates than do other international business travelers (51.5% versus 37.1%).

EXHIBIT VIII-8. NUMBER OF INTERNATIONAL BUSINESS TRIPS TO WHICH TWO OR MORE NIGHTS OF VACATION TRAVEL WERE ADDED (INTERNATIONAL BUSINESS TRAVELERS)



Bringing a companion along is another way of extending a business trip. Roughly one in three business travelers (32.2%) brought along their spouse or a companion other than a business associate on at least one business trip outside Mexico in the past three years. One in 20 (5.5%) of all international business travelers—10.0% of those with children under 18 living at home—were accompanied by children under 18 years of age.

Women and married travelers are particularly inclined to bring along a companion on an international business trip; 41.8% of female international business travelers did so at least once in the past three years, compared with 28.7% of men. Similarly, 35.3% of married travelers did so, compared with 26.3% of unmarried travelers.

Those who bring along non-business companions are almost twice as likely as other travelers to stay longer for pleasure. For example, 64.2% of international business travelers who brought along a non-business companion added two or more nights of pleasure travel to one or more of their trips in the past three years.

INTERNATIONAL MEETINGS AND CONVENTIONS

Meetings and conventions conducted by corporations and associations are a large component of the Mexican domestic travel industry; international meetings and conventions also represent a sizable segment.

EXHIBIT VIII-9. PROFILE OF INTERNATIONAL BUSINESS EXTENDERS AND MEETINGS AND CONVENTIONS ATTENDEES

	International Business Extenders	International Meetings and Conventions Attendees*
Age		
18 to 24	13.6%	16.7%
25 to 34	20.8	18.1
35 to 44	23.4	20.9
45 to 54	27.9	31.2
55 to 64	9.7	7.0
65 or older	4.5	6.0
Socioeconomic class		
A/B	56.5	56.3
C+	43.5	43.7
Marital status		
Married	64.9	66.0
Not married	35.1	34.0
Gender		
Male	73.4	73.8
Female	26.6	26.2
City		
Monterrey	58.4	49.1
Mexico City	37.7	46.3
Guadalajara	3.9	4.7
(Number of respondents)	(154)	(214-215)

* Attended at least one international corporate meeting, association meeting, or convention in the past three years.

Nearly two-thirds (63.3%) of Mexican international business travelers attended an international corporate meeting, association meeting, or convention in the past three years. These meetings attendees are younger, of a higher socioeconomic class, and more concentrated in the nation's capital. More than half (55.7%) of interna-

tional meetings and conventions attendees are between the ages of 18 and 44, compared with 48.5% of other international business travelers. Similarly, 56.3% are members of socioeconomic class A/B, compared with 48.4% of other international business travelers. And 46.3% live in Mexico City, compared with 35.8% of other international business travelers.

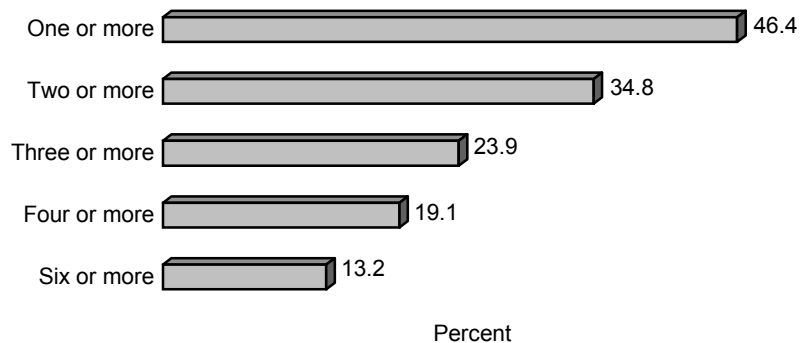
In the past three years, 56.4% of international business travelers attended an international corporate meeting, such as sales meetings, stockholder meetings, new product launches, training seminars, or management meetings.

Also in the past three years, 44.1% of international business travelers attended an international association meeting or convention, including annual professional meetings, educational and technical seminars, or committee meetings.

OVERLAP WITH PLEASURE TRAVEL

Not quite half (46.4%) of Mexican international business travelers took at least one separate and distinct pleasure trip outside the country in the past three years. Nearly a quarter (23.9%) took three or more such trips (Exhibit VIII-10). By comparison, 54.6% of U.S. international business travelers took at least one separate international pleasure trip of five or more nights.

EXHIBIT VIII-10. NUMBER OF INTERNATIONAL PLEASURE TRIPS TAKEN IN THE PAST THREE YEARS (INTERNATIONAL BUSINESS TRAVELERS)



However, frequent business travelers tend to be frequent pleasure travelers as well; 56.5% of frequent international business travelers

are also frequent international pleasure travelers (in both instances, these travelers took four or more such trips in the past three years).

AIR TRAVEL

AIRLINE SELECTION CRITERIA

International business travelers value low fares and a reputation for excellent service when choosing between airlines (Exhibit VIII-11). Frequent business travelers tend to be less concerned with service and to place slightly more emphasis on scheduling and mileage credit.

Roughly a quarter (23.9%) of international business travelers belong to a frequent flyer program, compared with 13.2% of pleasure-only travelers.

EXHIBIT VIII-11. MOST IMPORTANT AIRLINE SELECTION FACTOR

	All International Business Travelers	Frequent Business Travelers
Lowest fare	43.6%	42.7%
Reputation for excellent service	42.1	38.2
Most convenient schedule	9.2	10.7
Mileage credit in a frequent flyer program	5.0	8.4
(Number of respondents)	(337)	(131)

PERCEPTIONS AND RATINGS OF CARRIERS

Not surprisingly, international business travelers are familiar with the quality of international service offered by the major Mexican carriers; both Aeromexico and Mexicana are extremely well known (Exhibit VIII-12). Even the most widely known foreign airlines—American Airlines, Continental Airlines, and United Airlines—lag behind. A considerable percentage of international business travelers have no perception of many foreign carriers.

In general, international business travelers are not concerned with the nationality of the carrier when they travel outside of Mexico; for instance, when taking *any international trip*, business travelers do not differentiate between Mexican carriers and the airline of the country they are visiting. However, when taking *a trip to the United States*,

international business travelers are nearly twice as likely to prefer to fly a Mexican airline (38.5%) as a U.S. airline (20.7%).

EXHIBIT VIII-12. INTERNATIONAL BUSINESS TRAVELERS HAVING ANY IDEA OF WHAT SELECTED CARRIERS WOULD BE LIKE FOR INTERNATIONAL TRAVEL

	All International Business Travelers	Frequent Business Travelers
Aeromexico	98.5%	99.2%
Mexicana	97.1	99.2
American Airlines	86.7	94.0
Continental Airlines	75.4	85.6
United Airlines	71.0	81.8
Delta Air Lines	65.5	74.2
Air Canada	63.2	73.3
Air France	62.7	76.5
Iberia	61.1	70.5
British Airways	60.4	73.5
America West	58.7	66.2
Northwest Airlines	58.1	68.9
Grupo Taca	49.3	61.4
Lan Chile	47.8	63.6
(Number of respondents)	(337-339)	(131-133)

Among business travelers who have *some perception* of the airlines, Air France, British Airways, and Air Canada receive the highest ratings, followed by Aeromexico and Mexicana (Exhibit VIII-13). Both Aeromexico and Mexicana also do well among frequent business travelers. All U.S. carriers receive lower ratings.

EXHIBIT VIII-13. INTERNATIONAL BUSINESS TRAVELERS RATING
 SELECTED CARRIERS AS “EXCELLENT” OR “GOOD” FOR
 INTERNATIONAL BUSINESS TRAVEL*

	All International Business Travelers	Frequent Business Travelers
Air France	92.1%	91.1%
British Airways	89.8	89.7 [†]
Air Canada	89.7	90.7 [†]
Aeromexico	88.6	87.0
Mexicana	86.9	87.8
American Airlines	86.8	83.2
Continental Airlines	85.4	79.7
United Airlines	81.3	75.0
Delta Air Lines	76.6	76.6 [†]
America West	75.4	70.4 [†]
Northwest Airlines	72.6	67.1 [†]
Iberia	63.7	62.3 [†]
Lan Chile	59.0	53.6 [†]
Grupo Taca	48.2	47.3 [†]
(Number of respondents)	(161-333)	(81-131)

* Among those who have an opinion of the carrier.

[†] Based on fewer than 100 responses.

PART IV: TRADE RESEARCH



**IX MEXICAN TRAVEL
TRADE RESEARCH**

This chapter presents findings from qualitative research conducted with Mexican travel trade representatives. The purpose of this research was to explore perceptions of Canada among members of the Mexican travel trade and to identify any deficiencies in product, communications, or awareness that might hinder the growth of tourism to Canada.

PERCEPTIONS OF CANADA

Overall, interviewees¹³ find Canada to be a peaceful and pleasant destination, with a wide variety of attractions. Respondents noted that a well-established reputation for security and affordability provides a level of comfort for Mexicans who are expanding their travel horizons beyond Mexico or the United States for the first time. The primary issues we identified were inadequate flight availability from Mexico and limited awareness among Mexican consumers about Canada’s range of attractions.

STRENGTHS

Interviewees believe that Canada’s main strength is its *variety*. Mexican tour operators and agents promote Canada’s combination of culturally rich cities, spectacular natural scenery, and excellent service.

Every aspect of Canada is attractive to our clients. I offer it 7 times out of 10 because I trust in the market.

Above all, Mexicans enjoy Canada’s history, culture, and scenery—or rather, the combination of these.

Cities. Interviewees reported that Mexican travelers find Canada’s major cities to be historically and culturally interesting, as well as safe. They described Montreal and Toronto, in particular, as “beautiful,” “modern,” “cosmopolitan,” and “calm.”

Canadian cities have a very good image in Mexico; they’re full of attractions and very peaceful and relaxing—you don’t need a vacation from your vacation.

The cities in Canada are simultaneously modern and historically interesting, with both culture and entertainment.

¹³ A roster of interviewees is included in Appendix D.

Many Mexicans like the appeal of vacationing in peace, not in a huge busy city like Los Angeles or Las Vegas.

There are cities in the U.S. that are as safe as those in Canada, such as Orlando, but the CTC has done very well at selling the idea that Canada is a safe place with extensive cultural opportunities for a reasonable price.

Nature and Scenery. Mexican travelers reportedly place a great deal of importance on Canada's natural offerings; many interviewees considered Canada's beautiful natural scenery to be its most appealing aspect. A broad variety of outdoor activity and touring options are said to draw Mexican travelers. Again, several respondents stressed the importance of combining attractions.

Mexicans go to Canada because it has beautiful scenery and natural beauty; this is really Canada's competitive edge.

Canada has a lot of nature that is well kept and interesting to explore. Its strength is that it combines nature and physical beauty with wonderful cities.

Our clients enjoy touring Canada's nature and national parks, as well as the cities.

One of Canada's greatest advantages is that it's relatively close but very different geographically from Mexico.

People. Every single respondent had only positive things to say about Canadians. Interviewees described the Canadian people as "warm," "welcoming," "cordial," "friendly," and "pleasant," and indicated that Mexican travelers appreciate the feeling of acceptance they receive in Canada.

Canadians are more welcoming of Mexicans than Americans. The warmth of the people and their receptiveness to tourists are Canada's strongest points.

I recommend Canada because it's clean and because Canadians are educated, civilized, friendly, and polite.

Personally, I like Canada because there are no feelings of racism or segregation toward Mexicans.

Canadians are very hospitable, and they don't discriminate against Mexicans. By this, I mean that many people in the United States don't try to understand you if you don't speak English; Canadians at least try to understand Mexicans.

Exchange Rate. Mexican agents and operators promote Canada's advantageous exchange rate as a draw for travelers looking to shop on their vacation, for example, at the "exceedingly popular" Thousand Islands shopping center in Ontario.

There's a budget factor when Mexicans consider Canada; they know they have better purchasing power and their money will go farther there.

Most Mexicans travel in order to shop, and they like Canada's shopping opportunities. The selection of clothes is very good and the prices are reasonable, especially with the exchange rate.

Visa Requirements. Interviewees reported that Canada's uncomplicated visa requirement increases the likelihood that Mexican travelers will visit the country. Many Mexicans are increasingly seeking out alternative destinations because obtaining travel visas to the United States has become a difficult, costly, and lengthy process. In this regard, Canada enjoys a definite advantage.

Many Mexican consumers are seeking destinations where they don't need to worry about the hassle of securing a visa, and in this regard Canada is preferable.

Since Latins tend to travel at the last minute, this has really helped Canada. By the time many Mexicans decide to travel, they wouldn't be able to get the U.S. visa in time for a trip there.

Travel to Canada has increased since the U.S. consulate reduced the number of travel visas; many Mexicans are going to Canada instead.

An important factor for pleasing Mexican travelers is the friendliness of the receptive government. Canada is very strong in this regard.

Dual Cultures. Many interviewees believe that Canada's two distinct cultural experiences is an added draw for Mexican travelers. Quebec is said to have a unique and sophisticated atmosphere. Several respondents mentioned that the linguistic similarities between French and Spanish enable Mexicans to travel easily through Quebec, and a few noted that many upscale Mexicans speak French.

Mexicans enjoy French and English Canada equally well. Often they will visit the English region first and then return to see the French area. French is the third language of many educated Mexicans, and even those who don't speak French can get around Montreal just with Spanish or even their English skills.

The French influence helps to distinguish Canada from the U.S., which has no comparable "high-culture" influence. Mexicans feel like they are in Europe in Canadian cities.

Many Mexicans like the cosmopolitan nature of Montreal and Toronto and the European feel of Quebec; they feel like they're experiencing a different culture.

Canada is distinguished by a lot of culture; the U.S. has almost no culture. Mexicans like Canada because it's like a combination of the U.S. and Europe.

Only a few respondents believe that the French influence actually puts off travelers to Canada or that Mexicans prefer to travel in English-speaking areas of Canada.

The French language can be problematic to Mexicans traveling in Canada. That's why I think our circuit tours are so popular there; the Spanish-speaking guides help circumvent the language problem. We sell three times as many circuit tours to Canada as to the United States; while most of our travelers know enough English to get by in Las Vegas, New York, or Miami, very few know enough French to feel confident about traveling independently in Canada.

The French influence is not a draw, but rather a bad influence. Mexicans are afraid of getting bad service. Everyone knows the French are rude and give bad service, and unfortunately, my customers find that to be true. Often, they will choose western over eastern Canada to avoid the French.

BARRIERS

Interviewees reported that direct competition from the United States is the greatest restriction to selling more travel to Canada. For instance, Anaheim and Orlando have cornered the market for Mexican family travelers; similarly, adults traveling for entertainment favor Las Vegas and Los Angeles.

I prefer Canada to the United States, but it's not as popular with consumers because it doesn't have many amusement parks or special attractions for kids—a priority for families.

For entertainment, Canada can't compete with Orlando, Anaheim, Las Vegas, or Los Angeles.

Interviewees maintained that Canada has the potential to compete very strongly against the United States, but must first overcome limited direct flight availability and a comparative lack of awareness among Mexican vacationers about its range of attractions.

Flight Availability. An insufficient number of direct flights frustrates operators and agents who strive to suit many consumers' preference for traveling to Canada directly. Several respondents maintained that direct flights are so infrequent that it is increasingly difficult for them to create packages with convenient departure and return arrangements.

Most interviewees believed that business from Mexico could be considerably higher with increased flight availability. Several respondents specified that they face the greatest difficulty in finding direct flights to Vancouver and western Canada. The new Mexicana flight that began in December 2002 will help alleviate the situation.

Only two airlines offer direct service to Canada, while several flights go to major destinations in the U.S. like Houston, Dallas, Miami, and Los Angeles. Mexicans without visas often prefer and are willing to spend more for direct flights because they know that sometimes they won't be treated well when transferring in the U.S.

They canceled the direct flights from Monterrey to Canada, so now we have to stop over in the U.S. or fly via Mexico City.

About 35% of our business is selling Canada. It would be higher, but there are only three to five flights a week.

Several interviewees mentioned the high cost of air travel as a barrier to selling more pleasure travel to Canada. In fact, the advantage Canada enjoys over the United States with regard to a positive exchange rate is often cancelled out by the relatively high cost of air travel from Mexico.

Many Mexicans dream of traveling to Canada, but consumers often compare vacation destinations by price, and commercial prices to Canada are comparatively expensive. To contrast shopping trips, for example, a package of air ticket plus one night hotel is US\$458 to Toronto and just US\$299 to Houston.

Mexicans will travel back and forth to the U.S. many times, but they generally visit Canada just once because of the expensive airfares. For example, fares to New York City and Chicago are considerably cheaper than to Toronto, even though the destinations are a similar distance from Mexico.

High airfares keep Mexicans from traveling to Canada. Air Canada raised their fares earlier this year, and everyone has followed suit.

Limited Awareness. Some interviewees noted that Canada suffers from underexposure in Mexico. Inadequate Canadian publicity in the Mexican market leads to less interest in the destination, as compared with its competitors. Affluent clients, in particular, express greater interest in vacationing in Europe.

There's a greater interest in traveling to Europe, if the traveler has the means to do so, because of a lack of publicity on Canada.

The biggest impediment for Canada is the lack of promotion in Mexico; Canada isn't top-of-mind for Mexican travelers.

Growth in business to Canada has been strong, but the volume is still very low. For example, we have sent 100 passengers to Las Vegas this year but just 10 to Canada.

Respondents pointed out common misconceptions that arise as a result of consumers' limited awareness of Canada. For instance, Canada is known for its skiing and winter activity destinations; however, concern about extremely cold weather often leads Mexican consumers shopping for winter vacations to choose alternative destinations in the United States over Canadian resorts.

It is too cold in the winter, which Mexicans don't like. Mexicans only travel in the winter to ski, and they can be much more comfortable in Aspen or Vail.

SELLING CANADA

Most respondents agreed that Canada, even as a relatively new destination for Mexican travelers, is a valuable and significant addition to their product line. Even respondents who indicated that Canada accounts for a small portion of their business were optimistic about the destination's prospects.

Canada has become an integral part of our business. It's our second most important destination, behind only Europe.

Canada is an important part of our product line; we've promoted it in tourism magazines, newspapers, and even with Canada-specific brochures.

TOP DESTINATIONS AND ACTIVITIES

Eastern Canada. Tour operators and travel agents reported that eastern Canada drives the majority of their business to the country. On vacations to eastern Canada, Mexican travelers enjoy cultural tours, visits to historical attractions, and outdoor physical activities. Most respondents noted that eastern Canada draws the majority of its Mexican business in the summer months. Nonetheless, Mont Tremblant and Mont Sainte Anne in Quebec also draw a fair share of Mexican travelers for winter ski vacations.

Eastern Canada reportedly benefits from the high level of awareness that Mexican travelers have of Quebec. Further, many respondents find it easier to arrange flights to Montreal and Toronto than they do to Vancouver.

Our package tours to Vancouver, Whistler, and the Rocky Mountains sell well, but the traditional route through Montreal, Ottawa, and Toronto is more popular because it's the most publicized.

“Circuit” tours—exceedingly popular with Mexican travelers to eastern Canada—commonly take in visits to a number of cities and attractions, including Montreal and Quebec City, as well as Toronto, Ottawa, and greater Ontario. Interviewees mentioned Niagara Falls, the Thousand Islands shopping center, the Laurentian Mountains, Parliament in Ottawa, and the Ice Hotel in Quebec City as popular attractions. Typical components of these tours include airfare, ground transportation, entrance to local attractions, and the service of a Spanish-speaking guide.

Montreal and the province of Quebec in general are the most popular stops on our eastern Canada tours because people feel as if they are in Europe.

The combination of cities and scenery is a big drawing card for our tours of eastern Canada.

Several respondents mentioned that summer whale-watching tours in Eastern Canada are rising in popularity. A common offering begins in Toronto, visits Thousand Islands and Niagara Falls, and tours Ottawa, Montreal, and Quebec City before continuing north along the Saint Lawrence River to popular whale-watching sites, such as Tadoussac.

Our most popular trip is our “Canada with whales” tour, which lasts eight days and includes city tours in Ontario and Quebec with whale watching on the Saint Lawrence.

Packages to see the whales and the bears and other wildlife are very appealing.

Western Canada. Western Canada sells particularly well during the winter, when many young Mexican travelers take international skiing vacations with groups of friends. Whistler, Banff, and Jasper, in order, were the destinations most commonly mentioned by interviewees. One operator noted that an arrangement with Japan Airlines allowed them to offer particularly affordable winter packages to Vancouver and western Canada.

Expectably, most respondents who offer ski packages to both the United States and Canada reported much higher sales for their American product. Interviewees indicated having difficulty overcoming the positive reputation earned by ski resorts in the United States over the years. Top American destinations have made significant inroads among Mexican travelers; in fact, many wealthy Mexicans own condominiums in Vail for their winter vacations.

Canadian destinations don’t have the “name,” like Aspen and Vail.

Whistler has a wider season for skiing than U.S. destinations do. But skiing is most popular among high-income people; rates and sales aren’t important to them—they’re most concerned with the name of the destination.

Vail is still the most popular ski destination among Mexican travelers because it's been promoted for 20 or 30 years. Whistler is the most popular ski destination in Canada, but people have only known about it for five years.

However, several respondents indicated that their Canada ski packages are very competitive with those to the United States. Family travelers, for instance, tend to prefer Canada for ski vacations; we hypothesize that this may be related to Canada's favorable exchange rate and its affordability, compared with the United States.

Aware of the boom in demand and hoping to get a share of business, many operators are entering the winter activities market; in fact, several of our interviewees revealed that this winter will be their first season promoting ski packages to Canada.

Canada is more attractive as a ski destination because of the affordable price, the terrific service, and the excellent product.

Ski trips to Canada are rapidly becoming more popular in Mexico. There were only about six or seven operators doing this previously, but this year, especially, the increase in ski tours has been dramatic.

We need to change the current mind-set that the only place to ski is the U.S. The truth is that Mexicans prefer to travel to Canada.

Clearly, western Canada is not solely a winter destination for Mexicans; tour operators and travel agents reported that summer vacations commonly include city tours of Vancouver, Victoria, and Calgary. Other fashionable destinations in British Columbia are Sun Peak and Kamloops, Three Valley Gap, Kelowna, and Blue River. Popular attractions include Capilano Suspension Bridge in Vancouver and Butchart Gardens in Victoria. Train rides and visits to Lake Louise and Canmore were mentioned as popular activities for Mexicans traveling in the Canadian Rockies during summer months.

We have a special offer with Japan Airlines called "Special Vancouver" that includes lodging, entrance tickets to attractions, and special discounts.

TYPICAL CLIENTS

Respondents reported that typical Mexican travelers to Canada are middle- and upper-class families. Our interviewees were nearly

evenly split between those who said that the majority of their clients were first-time visitors to Canada and those who reported that most of their clients had generally traveled to Canada at least once before.

We get all kinds of travelers: young people, newlyweds, older couples, students, and families with children, usually in family groups of four or five members. The majority of our customers are from middle- to upper-class backgrounds and are in Canada for their first or second time and don't know much about the country.

Much of our business is in the summer, and many of our travelers to Canada are return travelers. Perhaps they've already been to Toronto and now want to see Calgary, or enjoyed their trip to eastern Canada and want to go again with a spouse who couldn't make it last time.

According to our respondents, Mexicans rarely travel alone on vacations to Canada, preferring instead to travel in small groups of friends, multiple couples, or multi-generational family members. Several interviewees said Canada also draws Mexican honeymooners.

Many of our clients are families and seniors, particularly families with children who don't want to travel to Orlando or Anaheim again. Also clients who like culture and history and who desire more than just a pretty city to visit.

Most of our clients are upper class, and they travel with their family. This could mean a family of four, or large groups with aunts and uncles.

Respondents noted that sending children to English and French language camps in Canada has become very popular among upscale Mexicans. And frequently, children who travel to Canada to attend camps during the summer months are accompanied by parents and extended family members, who take advantage of the opportunity to travel throughout Canada.

We're familiar with the range of youth summer camps and courses available in Canada. We put together packages for parents who travel with their children to these camps and then wish to stay and visit different Canadian cities.

We actually sell a “quinceñera” package to Canada in July and August—girls travel with groups of friends to study English.

Most interviewees reported that their clients typically visit three to five separate destinations on a vacation trip to Canada. A few operators said that their clients prefer to visit as many as seven or eight cities on a circuit tour, spending one night in each. Summer travelers are more likely to expand the number of places they visit within Canada; expectably, winter travelers generally prefer to remain at or around one resort area.

Interviewees agreed that most Mexicans travel to Canada for 7 to 10 nights, with many trips lasting as long as two weeks. Again, summer trips are generally longer than winter trips. One agent noted that, thanks to brief direct flights from Mexico City, some of his customers enjoy traveling to Canada for as short a period as four days.

Canada is comparatively close—you can get there in four hours. You can’t get to Acapulco by land that quickly.

CANADA AND THE UNITED STATES

Respondents noted that most vacations from Mexico to Canada are single-destination travel. Strict visa requirements for travel to the United States following the events of September 11th have further sparked demand for Canada-only trips. As a result, several interviewees now sell Canada and the United States strictly as separate destinations.

We only combine the U.S. with Canada if the client requests it; 70% of trips involving Canada are stand-alone.

We have offered the two countries together in the past, but the combination doesn’t sell well. It seems that travelers want to know one country well on its own rather than trying to “understand” two countries on the same trip.

We sell Canada independently. I don’t know why you’d sell it jointly with the U.S.; one of its advantages is that you don’t need a visa.

Nonetheless, packages that visit both the United States and Canada in the same trip are still common. The most popular combination trips are located in the east, where many operators offer an option to extend their eastern Canada tours to include New York City and

Washington, D.C. Other typical combinations include Boston, Philadelphia, and other cities in New England with cities in Quebec and Ontario.

For the most part, Mexicans will travel exclusively within Canada, but sometimes they will go through the U.S. For example, to Buffalo via American Airlines, over to Niagara Falls by land, and then to Ottawa by train.

Our most popular U.S.-Canada combinations are a Vancouver-Whistler-Calgary-Toronto circuit tour with a stopover in Dallas, and a Montreal-Ottawa-Mont Tremblant tour with a stopover in Chicago.

We do have some combination U.S.-Canada tours; these usually take in New York, Boston, or Washington with Montreal or Toronto. However, these tours aren't so popular because of the visa difficulties with the United States.

Of note, several respondents pointed out that recently introduced cruises to the United States and Canada are selling well in Mexico. Interviewees reported success selling cruises along the west coast of Canada and along the Saint Lawrence River.

During the summer months I sell a lot of cruises along the west coast up to Alaska, along with pre- and post-cruise excursions into Vancouver and Anchorage.

In the fall, we sell wonderful cruises from New York up to Canada; the Saint Lawrence River is wonderful to see by boat, and the fall colors are fantastic.

We just learned about cruises to Canada at the last CTC Expo, and think that it can be very strong when combined with whale watching.

DESIGN OF PRODUCT LINE

When asked to describe how they designed their Canadian product line, most operators said they simply follow consumer demand and product availability. Many operators generate a general marketing plan and then select from an assortment of available products to suit a client's particular requirements. A few operators reported designing their product line in cooperation with partner receptive operators. One operator reported using feedback from a Canada International Tours consumer survey.

We began selling circuit tours to Canada 12 years ago and have been following the market in designing our product line. With regard to ski packages, we offered one package at first and added more when saw a great response.

We have agreements with receptive operators. We put together their packages with airfares we can get from Air Canada.

We work for a tour operator in Canada; they decide on the offerings, and we sell them in Mexico.

Fly-Drive. Respondents were in agreement that fly-drive travel to Canada does not generate a large portion of their business. Several operators explained that although they do not offer fly-drive packages, they can and do arrange rental car reservations for their clients, directly or through the airlines.

Fly-drive isn't too popular, even among individual travelers. I think this is because Mexicans don't understand the highway signs since they're all in French. Most know enough English to drive in the United States, but in Canada it's too confusing and Mexicans don't feel confident driving.

Hotels. Most interviewees said they offer a range of hotels to fit the needs and preferences of their clients. The majority of those who specified a class indicated four-star, with a few economy operators offering three-star hotels and high-end operators offering five-star properties. Many respondents agreed that Mexican travelers generally gravitate toward well-known and prestigious properties when making vacation reservations.

Mexicans like well-known hotels in Canada like the Excelsior, the Ritz, the Chateau Frontenac, and the Chateau Lake Louise. Name properties that everyone has heard of are very important.

We offer all hotels. Typically, the difference in rates between hotels of differing qualities is not great, and many Mexicans opt for the more expensive ones.

The hotels tend to be better in the east; hotel selection is limited in some of the cities we go to in the west.

ROLE OF TRAVEL AGENTS

On average, tour operators said they sell roughly 80% of their business through travel agents and 20% direct to consumers. Answers for the proportion of sales made direct to consumers ranged as high as 50%. Operators noted that direct mail solicitation and joint promotional efforts are increasingly common.

We have an agreement with a bank here in Mexico to include our brochures with their monthly credit card invoices. We promoted Canada directly to consumers this way through the summer with good results.

Those operators who make more sales through agents tended to believe that Mexican travel agents are knowledgeable about Canada and very receptive to selling it. One operator contended that, in her experience, roughly a third of travelers to Canada decide on the destination because of the input given by their travel agent.

However, many operators who sell directly to consumers felt that Mexican travel agents would benefit from additional training. A few were adamant that the majority of agents in Mexico lack sufficient awareness to adequately sell Canada, in part because of the limited number of tour operators currently promoting the destination.

In general, travel agents in Mexico are not well qualified, and many consumers prefer to buy directly through operators. We can meet the consumer demand, but we would prefer that agents make sales. We need qualified, trained, and well-prepared travel agents.

Operators provide more destination information than agents; agents only read the brochure and identify the price per person for each package. We have focused on agents to get them more qualified and informed—for instance, we have regular seminars—but they don't remember the information.

IMPACT OF SEPTEMBER 11

Only one operator reported that his business had remained completely unaffected by the events of September 11. All other interviewees reported that their business was negatively affected and continued to suffer through late 2001 and early 2002. A few added that their sales have still failed to recover completely.

We've seen no effects from the terrorist attacks of last September, either in Canada or the U.S. My type of affluent clients will travel anyway.

This year, sales to Canada are 50% down, mostly because people are afraid of flying over the United States.

Our sales to Canada have decreased because all the exaggerations and rumors propagated by the media have made Mexicans scared to travel, even though the reality is very different.

However, most respondents agreed that the long-term implications of September 11th would be increased travel to Canada at the expense of the United States. Canada enjoys a reputation for safety—an attractive quality in uncertain times—and many Mexicans afraid to travel to the United States are readily substituting Canada instead.

Canada became a priority destination for Mexicans after September 11th because of its safety. Although the perceived threat of terrorism has passed, memories still linger when it comes to traveling to the U.S., and many travelers prefer a destination that they know will be safe.

Safety in the United States is a major concern; people think that Canada is much safer. Mexicans like to travel to the U.S. because it's close and cheaper to get there, but they have preferred Canada since September 11th. Our travel to Canada has gone up since then.

Several respondents noted that sales for Canada appear to have rebounded, even surpassing figures preceding the attacks. In fact, a handful said that travel to Canada during 2002 had adequately replaced their lost business to the United States.

OUTLOOK

On the basis of growing interest in Canada, the majority of interviewees were optimistic about continued expansion in the Mexican market. Most tour operators expect sales of Canada to grow in the coming year, with some predicting as much as a 25% increase in their business to the destination.

We are marketing Canada heavily by promoting new products to agents and consumers. We expect it to grow enough that we are actually revisiting our 2003 product line to meet the anticipated demand.

I see a bright future for Canada. It's a very popular destination, and that popularity stems from word of mouth: those who have been to Canada promote it as a nice place to vacation.

I think it's an excellent destination, and we're just on the cusp of a huge boom in travel there. Travel to Canada is coming into style, and now is when we should sell it heavily.

Many interviewees anticipate that summer travel products hold the strongest potential for progress. Hot commodities include cruises, language programs, and wildlife viewing. In fact, numerous respondents reported recent success with outdoor physical activities, including hiking, camping, and river rafting.

We plan to add summer trips to Vancouver. Our Canadian partner has recently put together a nature-focused tour to Vancouver. This tour includes lodges, hiking, and trips to mountains and rivers.

One indicator of the country's increasing popularity is the marked growth in French and English language courses for youth.

Of the destinations we offer, only Costa Rica and Perú have registered a higher increase than Canada.

We're introducing new programs to meet the tastes and budgets of our clients. We like to offer more variety and alternatives to our clients who have already taken one tour to Canada.

Golf is increasing in popularity among upscale Mexican travelers, although interviewees believed that very few Mexicans would travel to Canada specifically to play golf. Respondents noted that Mexicans who take golfing vacations commonly travel to Hawaii and Florida, destinations with more established name recognition.

Golf sells well in Canada, but it could do better. Mexican travelers who play golf on vacation are attracted to top-quality courses with a recognized "name." If the CTC could get a high-quality Canadian golf course to host a PGA event, we could drive business to that area very easily.

We have tried packaging alternative activities with trips to Canada, but sales were low. The CTC should let Mexicans know about the good golf courses in Canada. I think there could be a market if people knew more about them.

INTERFACE WITH THE CTC

Most interviewees spoke positively about the current level of assistance they receive from the CTC. This section includes a wealth of respondent quotes, because we feel they may be of particular relevance to the CTC.

The CTC is said to be visible in the Mexican travel industry and to provide a variety of publications and promotional materials. Many operators appreciate efforts to connect receptive travel providers and Mexican tour operators through travel fairs and seminars. Clearly, the CTC's greatest strength in the minds of most respondents is as a resource for information regarding the Canadian product.

We organize seminars for agents and invite the CTC¹⁴ to come talk about Canadian cities, products, and activities, since they're the experts. The CTC representatives get the agents excited about selling Canada. They share information and anecdotes that the agents can then tell their customers to get them interested in traveling to Canada.

The CTC has provided tremendous support as a source of information and as a consultancy. They respond to our inquiries and provide contact information for other operators. Their staff is enthusiastic, positive, and always looking for new and innovative ways to increase travel to Canada. They've provided plenty of tourist literature, hosted breakfasts, taken us on annual caravans to Canada, and held semiannual promotional events.

The CTC provides assistance in many ways: they send us operator packets, give us discounts, and hold fairs twice a year. They stay in constant communication with us through the Internet and are very proactive in finding ways to help us.

We have very good relations with the CTC and go to their trade shows. They've been a great help, particularly with advertising; Ms. Susana Morales has worked with us, and they've done a lot of promotional advertising to increase their presence in travel magazines.

¹⁴ Interviewees commonly referred to the CTC as “la CTC” or “la Comisión.” We use “the CTC” exclusively in respondent quotes for the purposes of this chapter.

We've had a lot of contact with the CTC, and they've been very helpful. Their assistance in lowering airfares 6% has been especially crucial.

A few interviewees reported limited interactions with the CTC but felt that the CTC's advertising material and regular promotional presentations currently met their needs.

I don't interact with the CTC directly, but we seem to have enough literature from them.

The CTC is in contact with us online, and that's enough. They're doing a great job as is, and they've been tremendously helpful. Just keep inviting us to participate in all the events and tourism expos.

We don't need anything new from the CTC. We have pamphlets in Spanish and plenty of information.

A handful of respondents had negative comments about the current level of assistance, or the lack thereof, that they receive from the CTC.

The CTC does not provide very much help. I participate in every event they set up, but they rarely, if ever, participate in ours.

We have almost no contact with the CTC. We have more contact with the Quebec office; they send us very pretty brochures and posters, along with agendas and calendars of services and festivals. And Quebec's office is very small. Why can't the CTC match their efforts?

The CTC hasn't helped us in any ways to date. They should be more commercially oriented, human, and approachable—less governmental and bureaucratic. They could start by learning that we exist; even though we do a lot of publicity and events, they don't seem to know who we are.

This year, unfortunately, we were not invited to the CTC's presentation because our literature describes Europe, South America, and Canada in the same flyer. Apparently, they invited only those that promoted Canada separately.

The market is there and waiting, but the CTC is too slow. I sent a TV crew to Canada last winter season, and the CTC sponsored a month's worth of airtime and advertising on one of our best Saturday morning travel shows. We had excellent results and very positive feed-

back, but the CTC wouldn't pursue it. They pulled back and remained inaccessible.

By and large, the travel agents we spoke with reported minimal contact with the CTC. A couple noted that the CTC-sponsored breakfasts for agents were especially helpful. Many said they were more likely to interact with tour operators than with the CTC when searching for information about Canada to provide clients.

INCREASING THE CTC'S EFFORTS

We asked our interviewees if they would be interested in receiving regular visits from CTC representatives as a means of increasing the current level of dialogue. Many respondents replied that they currently do meet with the CTC and appreciate the progress that personal meetings invariably afford.

Several interviewees said that although they do not currently meet with CTC representatives on a regular basis, they would welcome the opportunity to do so. Many hoped that beginning a dialogue with the CTC might lead to increased cooperative advertising efforts and promotional ventures.

We would appreciate visits; the CTC always has a wealth of useful information.

We haven't really met with CTC representatives before, but we would like to. It's important that they meet the destination promoters here in Mexico.

We would always welcome the CTC if they wanted to visit us; San Antonio and Houston do this often. I receive periodic promotional e-mails through Virtuoso and airline offices, and if I need more brochures or posters, I can contact the Canadian embassy, but I'm not sure where the CTC office is or how to get in contact with them.

I don't think we work with anyone at the CTC right now. This weekend we had a meeting to train our personnel to sell our new Vancouver route; someone with the Canadian embassy could have come to help us. For example, many other tourism offices like San Antonio, California, Los Angeles, and Sacramento come to Mexico.

Very few respondents did not welcome the idea of meeting regularly with CTC representatives. These interviewees were satisfied

with the current level of support and expressed concerns that increased interactions might affect the efficiency of their work.

Most interviewees said they currently work in cooperation with provincial or municipal tourism offices in Canada. The tourism offices for the province of Quebec, Montreal, Toronto, Vancouver, and Whistler were most commonly mentioned. Agents and operators typically approach local tourism offices directly when they desire information and promotional materials for regional attractions or specific cultural events.

We work with all the provinces, especially in western Canada. The cities have also sent us information before. I contact them with requests for information.

We contact municipal offices like Vancouver and Montreal when we need written information about special events, like the Grand Prix of Montreal.

Only a handful of respondents reported that they do not interact with provincial or municipal tourism offices, preferring instead to work directly with the CTC or with receptive operators.

DESIRED ASSISTANCE

We asked interviewees to suggest ways in which the CTC could better serve them. Nearly every interviewee had ideas for how the CTC could help them increase business, including consumer advertising, publicity to travel agents, direct assistance, and more and cheaper flights.

Developing a new product alone requires too large a capital investment on our part; we can't afford to put that much money into just one area. In addition, we can't guarantee the availability of air travel, hotels, cars, and land transportation that far in advance. So an ideal combination would include joint promotional efforts, aid in publicity, strategic alliances with receptive suppliers, and training for our salesmen.

Consumer Advertising. The most frequent suggestion we received was for the CTC to increase advertising efforts to the general Mexican public. Most respondents were in agreement that increased Canadian publicity would drive up consumer demand and enable them to sell significantly more product. Many had specific suggestions for how the CTC could best direct its advertising efforts in Mexico.

Newspapers are by far the best place to advertise, and TV is less important; the Internet is not a good medium to use in Mexico at all.

Newspapers are best for advertising, especially in the Sunday travel section. Mexicans who are set to travel often read these and book their travel soon thereafter. Reforma is the best newspaper to advertise in. Magazines are also good, but usually magazine readers aren't about to travel and will only be stimulated to go when tempted by a special deal.

They should emphasize Canada's beauty, the education and quality of the people, the variety of attractions, and the summer green and winter snow.

The CTC could create more publications about its attractions. I think it would especially help if Canada were more visibly promoted in tourist magazines. And they should emphasize its natural beauty and the hospitality of its people in promotions on TV and in newspapers.

We need promotion to the general public so that consumers know that Canada doesn't require a travel visa, that it's a more attractive destination than the U.S., that the language is not a large barrier, and that there's no discrimination against Mexicans.

Canada should emphasize the following assets in its marketing campaigns: its people and the scenery. If I had to choose three images to represent Canada, I would choose changing colors of the fall leaves, ferries crossing between Vancouver and Victoria, and icebreaking boats.

If there were a market, we would offer different packages, but we need Canada to help promote these aspects because it simply costs us too much to advertise.

Canada can become more popular, but the west needs to be publicized more, especially because the airfares aren't cheap.

Publicity to Travel Agents. Many operators felt that an intensive publicity program directed at travel agents would complement direct consumer advertising. Such programs would drive sales by increasing awareness of available product.

The CTC needs to help increase the image of Canada to travel agents so that they'll promote the destination to consumers.

The CTC could take a more hands-on approach by helping to train salesmen and by discussing new features and products of interest to consumers with Mexican travel agents.

The CTC should promote the country more heavily to the industry. The current advertisements are too general; they should call attention to the contact information of wholesalers and emphasize the wholesalers in the tourist literature.

Many agents agreed that they need more information to adequately sell Canada to interested Mexican consumers. Agents asked for more promotional materials from the CTC, including videos, posters, tourist maps, and compact discs with images of the destination to show prospective travelers. Some also mentioned familiarization trips.

I'd like more information to put in the hands of my clients, especially about Canada's seasons: when are the waterfalls at peak volume, when do the seasons change, when are ski resorts open. This might seem intuitive, but Mexicans are not familiar with Canada's climate, and I get many questions about such matters.

We could use more information about Canada's hotels and attractions. Also, more materials with general facts and Canada's history—sometimes we don't know enough about the country to answer our clients' questions.

I have tourist maps of Madrid and Paris in Spanish, but none for Toronto, Montreal, or Vancouver. We need promotional materials to give to our customers, and they should be in Spanish.

We need feedback and information on what products are available in the Canadian market. I think that we could dramatically increase our sales to Canada with help from the CTC.

Direct Assistance. Several operators expressed a desire to identify reliable receptive operators before offering new Canadian products, and requested that the CTC make strides to better connect the Mexican travel industry with receptive Canadian travel suppliers. These interviewees believed that such efforts would lead to more variety in product and, ultimately, lower prices. One operator mentioned difficulty in selling Canada during popular seasons without purchasing product in bulk well beforehand.

We're most concerned with getting suppliers in Canada to contact us with regard to package travel.

We need special incentives like optional tours, or a "plus" that we could add to our packets—like another attraction or an additional tour—at no extra cost.

We're not averse to expanding our offerings, but there has to be something that will attract our customers. Our decision would depend on the particular product and the suppliers available.

We would like to complement our current top sellers with something new. We have sought out other alternatives, but only recently have receptive operators begun to offer different and new destinations.

We are very interested in selling hunting and fishing packages, but we can't find operators who work in this segment.

More and Cheaper Flights. A handful of respondents argued that the CTC could have the greatest positive impact in Mexico by working with the airlines to encourage them to offer more direct flights to Canada or, alternatively, to offer lower promotional airfares for existing flights.

We need more flights to Canada. With so few flights available, the rates are very inflated. Cheaper fares would help us sell many more packages.

The most important change would be lower airfares. Right now, it often costs as much to fly to Europe from Mexico as it does to fly to Canada—and in some cases, Europe is cheaper!

SUMMARY

Our research with the Mexican travel trade revealed very positive perceptions of Canada and optimism about growing tourism to the country. Some expect as much as a 25% increase in business to Canada.

Canada's reputation for visitor safety, its wide range of tourism products, and the fact that it is a good value as a destination are its greatest assets with respect to the Mexican market. The biggest barriers are limited flights, low awareness of what Canada has to offer, and intense competition from the United States.

Almost all the trade interviewees liked to sell Canada—for many, the country has become an integral part of their product line. They tend to sell mostly single-destination travel to Canada, although some travelers also stop in the United States en route.

Many respondents believe that summer travel products hold the strongest potential for growth. They also anticipate growth in cruises. Several reported recent success selling outdoor physical activities in Canada.

Interviewees believe that the United States is a formidable competitor for Mexican vacationers. However, they see the tightening of entry requirements on the part of the United States as an opportunity for Canada.

In their view, to achieve its potential, Canada must raise awareness and try to expand air links. They believe that increased publicity will stimulate curiosity about Canada. New flights between the two countries and well-timed promotional airfares also would encourage Mexican travelers to act on their interest in visiting there.

PART V: PROVINCIAL ANALYSIS



X PROVINCIAL IDENTITIES

This section discusses some implications of the research for CTC’s partners in British Columbia, Ontario, and Quebec. We have conducted extensive analysis in an attempt to find discrete markets for each city or province and have found that the major Canadian destinations appeal to the same population of upscale Mexican travelers—Appendix E contains summary tables that illustrate the commonality of the market for Canadian cities. The findings presented in the summary tables suggest that rather than targeting subsets of target travelers for Canada, each city or province may consider matching its product offer with the characteristics of target travelers for Canada and highlighting aspects of the experiences each offers that differentiates the province from other places.

Although Mexican travelers have many positive perceptions of Canada, their knowledge of what the country has to offer is low. In fact, 6 in 10 of them admit to not knowing much about traveling in Canada—we suspect that they know even less about the experiences that each province can offer them. A number of Canadian destinations provide information in Spanish on their Web sites. Although many Mexicans speak English and French, online information about Canada in Spanish is likely to yield positive results.

APPEAL OF CANADIAN DESTINATIONS

As discussed earlier in this report, Mexican travelers as a whole are very interested in visiting the Canadian cities listed in our report. The level of interest among target travelers to Canada is even higher. More than 8 in 10 of them say they are extremely or very interested in visiting Toronto and Montreal and almost as many (77.8%) in visiting Vancouver. About three-quarters are similarly interested in Quebec City and Ottawa (Exhibit X-1).

EXHIBIT X-1. TARGET TRAVELERS TO CANADA EXTREMELY OR VERY INTERESTED IN VISITING OR REVISITING SELECTED CITIES

Toronto	82.1%
Montreal	81.3
Vancouver	77.8
Quebec City	75.4
Ottawa	74.6
Calgary	57.5
Whistler	50.6

(Number of respondents = 790)

There is much overlap in interest in visiting the Canadian cities listed in our questionnaire. For example, the majority of those who are extremely interested in visiting Toronto are also extremely interested in visiting Vancouver (81.9%), Montreal (77.9%), Quebec City (74.8%), and Ottawa (69.0%); and 40.5% are extremely interested in visiting Whistler. Further, among those extremely interested in visiting Montreal, the majority are also extremely interested in visiting Toronto (79.4%), Vancouver (76.3%), Quebec City (73.4%), and Ottawa (74.0%); and 41.4% are extremely interested in visiting Whistler.


CREATING PROVINCIAL IDENTITIES

The various Canadian provinces have what Mexicans seek in their vacation trips. Target travelers are looking for new destinations and tend to place high value on the educational aspect of travel. They are not reluctant to spend for quality, so they are good candidates for luxury products and services. At the same time, the fact that Canada’s prices are very competitive is also an important consideration for them.

We have selected some aspects of each province to highlight in marketing to Mexicans and submit these as samples of what might be done. To be sure, there is a fair amount of commonality in the offerings of the three provinces. Therefore, some recommendations made for one province may also apply to another one.

FOCUS ON BRITISH COLUMBIA

British Columbia offers target travelers a safe and scenic destination with activities and opportunities for the whole family.

	<p>AN ACCESSIBLE ADVENTURE FOR THE WHOLE FAMILY</p> <ul style="list-style-type: none"> • Educational Activities • Skiing and Resorts • Nature and Wilderness • Cruising
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EDUCATIONAL ACTIVITIES

Mexicans tend to value the educational aspect of travel. In fact, more than 8 in 10 target travelers consider international travel an investment in their children's education.

British Columbia boasts a wide range of first-rate educational attractions, such as various museums, Science World in Vancouver, hands-on nature interpretation centers, and the Vancouver Aquarium Marine Science Centre, that can be promoted to those traveling with children as well as to adults traveling alone or with other adults.

SKIING AND RESORTS

Skiing has become very popular among upscale Mexicans—45.9% of target travelers would like to try downhill or cross-country skiing on a trip to Canada. Mexicans are becoming increasingly aware of the opportunities for skiing in Canada—tour operators report increasing demand for Canadian ski packages. Convenient air service to Vancouver augurs well for Whistler.

Since many Mexicans would be new to Canadian skiing, in addition to promoting the first-rate ski runs, highlighting the après-ski experience, luxury spa services, top-notch restaurants, and world-class hotels would help Mexicans consider taking a ski vacation to Canada.

Many Mexican families take skiing vacations to expose their children to the sport. Family travelers are especially good targets for British Columbia. They are more inclined to spend on vacation than other travelers. When asked to what extent they agreed with the statement “On vacation, I tend to treat myself and my family to the best I can afford,” 84.3% of those who traveled with their children agreed strongly, compared with 73.3% of other travelers.

NATURE AND WILDERNESS

Target travelers show a keen sense of adventure and a desire to get out and try different outdoor activities. Many might try hiking, kayaking, or canoeing in British Columbia.

As previously mentioned, target travelers overwhelmingly agree (99.0%) that Canada has spectacular scenery. But they need to be told how best to take advantage of what British Columbia has to offer in this regard. Because many of the more adventurous activi-

ties may be new for Mexicans, it would be important to stress that experiencing the great outdoors can be arranged with no sacrifice of comfort and amenities.


British Columbia’s promotions in Mexico should continue to highlight the fact that nature is everywhere, even in the cities. The photos of Vancouver and Victoria with water and mountains in the background, and information about the cities’ parks, bays, and beaches, communicate a feeling of “nature all around” and will be particularly effective when marketing to Mexican travelers.

CRUISING

Cruising is still a novelty in Mexico. Only 15.2% of target travelers have ever taken an ocean cruise of three or more nights. Yet interest in cruising is high. Because Mexicans like to travel with family members or with groups of friends, the range of activities on board appeals to many Mexicans. Further, a cruise along the west coast of Canada can speak to travelers’ interest in scenery, whale watching, the outdoors, and the new and different. Moreover, it offers opportunities for pre- and/or post-cruise stays in Vancouver.

FOCUS ON ONTARIO

Clearly, Ontario offers target travelers a wide range of experiences. However, for this analysis we have focused on blending cultural activities with spectator and participatory sports.

	<p>SOPHISTICATED FUN</p> <ul style="list-style-type: none"> • Theater and the Arts • Sporting Events • Beaches and Cottage Country • Golf
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THEATER AND THE ARTS

Almost 8 in 10 target travelers (78.1%) say that they would enjoy traditional activities (museums, art galleries, music, and dance) on a trip to Canada. A similarly high percentage (76.7%) would enjoy a cultural event or festival in Canada. Their interest in live performances bodes particularly well for Ontario because of the wide range

of excellent options available at very attractive prices compared with those in other major cities in the United States and Europe.

SPORTING EVENTS

Spectator sports also represent a particularly interesting opportunity for Ontario with respect to Mexicans. More than two-thirds (69.1%) of target travelers are likely to attend a sporting event while on an international trip.

Promotions for the province in Mexico should highlight the excitement of a Blue Jays, Maple Leafs, Ottawa Senators, or Raptors game and the world-class facilities, such as the Air Canada Centre, the Corel Centre, and the SkyDome. Target travelers should be able to reserve and purchase tickets before leaving Mexico, which appears to be the preference of the majority (56%). They should also be advised of the opportunities of getting tickets on arrival. Business travelers are often looking for activities to fill their evenings and should not be overlooked in the promotion of sporting events.

BEACHES AND COTTAGE COUNTRY

Mexicans like being near water; they enjoy swimming and water sports. Almost all (94.6%) say that they would incorporate a few days at a beach on an international itinerary. Because the summer season is the peak season for outbound Mexican travel—40.4% of all their international travel occurs between June and August—we believe that Ontario may also want to promote the lake regions near Ottawa and Toronto.

The fact that many summer camps are located in the lake districts and cottage country of Ontario suggests that target travelers might be receptive to spending a few days at one of the resorts in conjunction with a trip to bring a child to or from camp.

GOLF

Once golfers achieve some level of proficiency, the draw of playing in first-rate and exclusive courses becomes irresistible—in fact, prestige and name recognition are perhaps even more important to golfers than to skiers. Although Ontario—and Canada in general—has many top-quality golf courses, our research with the trade alerted us to the fact that tour operators and their clients are not aware of the quality of golf to be had. In fact, one tour operator even suggested hosting a PGA event in Canada to increase the


prestige of golfing in Canada, evidently unaware of the fact that the Bell Canadian Open—part of the PGA tour—has been held since 1904.

The Mexican market for golf holds promise. Almost 3 in 10 target travelers from Mexico (28.3%) are highly or somewhat likely to play golf on an international trip—the figure is higher (32.7%) for male target travelers.

To attract these prospects, it is necessary to increase awareness of the quality of Canadian golf courses and of their comparatively low cost. Increasing press coverage of Canadian golf courses and facilities in travel and golf magazines in Mexico and with the trade should yield dividends for Canada in this regard.

FOCUS ON QUEBEC

The Province of Quebec may want to offer target travelers a high-quality “European” experience with French culture, traditions, and language.

	<p>THE ALLURE OF EUROPE, CLOSE TO HOME</p> <ul style="list-style-type: none"> • French Culture and History • Name Recognition and Luxury Properties • Cuisine • Outdoor Activities
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FRENCH CULTURE AND HISTORY

Upscale Mexicans have a particular interest in “all things French.” France is by far their preferred European destination, and the ability to speak French is often regarded as an indication of good standing in society.

Four in ten target travelers (41.5%) agree with the statement that the French influence is one of the key reasons for visiting Canada, suggesting that Quebec may want to continue to stress this aspect in its promotions. Not surprisingly, those who speak French are more likely to agree than those who don’t.

Therefore, positioning Quebec as an opportunity for French speakers and “Francophiles” to enjoy a top-quality destination with a European flair at a good price is likely to appeal to target travelers.

In marketing to Mexico, Quebec should continue to use images featuring outdoor cafés, cobblestone streets, and luxuriant flower boxes and highlight the province’s historical sites that bring Quebec’s history to life, such as Le Village Québécois d’Antan with its reconstructed village life, costumed actors, and traditional French Canadian food, or evenings out to enjoy the music of a traditional *chansonnier* at a place such as Les Yeux Bleus in Quebec City or Les Deux Pierrots in Montreal.

NAME RECOGNITION AND LUXURY PROPERTIES

As previously mentioned, Mexican travelers are markedly different from Canadians when it comes to lodging preferences. For instance, they are about twice as likely as Canadians to splurge on lodging and far more likely to book first-class hotels and accommodations when they travel abroad. As the trade interviews revealed, Mexican travelers are willing to spend more for the sake of “name” appeal—not only for lodging but also for restaurants and other services.

Quebec stands to benefit from the appeal of “name properties,” such as Le Château Frontenac, to target travelers. Further, the “extras” that come with such a stay—such as available spa services and access to nearby golf courses—will appeal to target travelers who desire to offer themselves and their families the best they can afford.

CUISINE

Target travelers show a definite interest in fine food. Not only are they likely to splurge on dining (64.7%), they are also likely to try a well-known local restaurant (82.1%) while on an international vacation.

These traits are a particularly good fit with Quebec, where, in the European tradition, dining takes on particular importance. The province can appeal to Mexican travelers’ enthusiasm for fine dining by publicizing awards and reviews received by local restaurants and chefs, particularly those taking advantage of local products and specialty foods.

Target travelers for Canada are particularly good candidates for bundling high-end accommodations and first-class food into special *forfaits gastronomiques*. These will appeal to their sense of value and desire for good quality.

Target travelers' strong interest in cultural events and festivals makes them viable prospects for local festivals featuring seasonal produce, artisan cheeses and products, and local character and color. Similarly, they would be likely to enjoy the combination of local food and culture offered by visiting a *cabane à sucre*, partaking in an *épluchette de blé d'Inde*, or tasting traditional *Méchoui*.

OUTDOOR ACTIVITIES

The fact that many target travelers are active, sportive people presents interesting opportunities for Quebec. For instance, although traffic makes bicycling in the downtown core rather difficult in Montreal and Quebec, both cities—and many others within the province—should promote bicycle rentals and bicycle paths for Mexican tourists. Other non-motorized forms of transportation, such as walking, also appeal to target travelers, who are precluded because of safety considerations from doing these kinds of things in their own country.

Quebec's urban areas can actively cater to this interest—and to target travelers' independent, spontaneous planning preferences—by providing self-guided walking and bicycling maps. Such excursions would allow target travelers to see the highlights of the destination from up close.

As discussed earlier, winter activities are surprisingly popular among Mexican travelers. Most are willing to travel to Canada at any time of year (69.5% agree) and want to try different activities such as dogsledding and skiing (58.0%). Quebec is well positioned to benefit from their interest in experiencing the Canadian winter. To do so successfully, Quebec should highlight certain elements of winter activities and experiences.

Although many cities have winter festivals, Quebec's cities appear to embrace winter. Events such as the Carnaval de Québec and activities such as horse-drawn sleigh rides will appeal to target travelers' fun-loving nature. The “magic” of winter and childlike fun of catching snowflakes could be highlighted in promotions to Mexicans to appeal to this sense of discovering something new.



APPENDIX A

RESEARCH APPROACH

RESEARCH APPROACH

The research findings are derived from an in-person, in-home survey of 1,042 upscale Mexicans—namely, persons belonging to the A/B or C+ socioeconomic class.

The Asociación Mexicana de Agencias de Investigación (AMAI) system of socioeconomic classification was used for assignment of socioeconomic class. This system, developed by Mexican researchers, is commonly used by research institutions in Mexico. It uses personal possessions and educational level as surrogates for income levels.

In our research with travelers in Latin American countries, we typically rely on a standard—such as the AMAI system of socioeconomic classification—rather than income level to select respondents. Self-reported income data in Latin America are often suspect because it is not unusual that the respondent—not always the head of household—is unaware of the household income or does not want to divulge it. Moreover, many Latin American travelers have high levels of discretionary income available for travel. For example, expenditures for housing may be minimal because outright home ownership is common among upscale Mexicans. Also, university-level education—a category that many U.S. travelers save for—is comparatively inexpensive.

The survey was directed to upscale Mexicans who took at least one trip of five or more nights outside of Mexico for pleasure, to visit family, or for business in the past three years. Those employed in the travel industry were excluded from the sample.

The survey was conducted in Mexico's three principal metropolitan areas: Mexico City, Guadalajara, and Monterrey. The fieldwork was conducted by BIMSA-Ipsos, under the direction of Menlo Consulting Group, between November 6 and December 8, 2002. Each interview lasted approximately 45 minutes. An English copy of the questionnaire is contained in Appendix B; the Spanish version is in Appendix C.

The subcontractor, using its Estudio General de Medios database, provided profiles—age, gender, socioeconomic class, and city of residence—of Mexican adults who traveled internationally for

pleasure in the past year. The age, gender, and socioeconomic profiles were used to establish sampling quotas for the survey.

With regard to the city of residence, the three principal metropolitan areas were surveyed approximately equally to provide sufficient sample sizes to facilitate analysis of the data by city of residence. The distribution of respondents among the three cities is shown in Exhibit A-1.

EXHIBIT A-1. DISTRIBUTION OF SURVEY RESPONDENTS

Mexico City	379
Guadalajara	331
Monterrey	332
	<hr/>
	1,042

To ensure that the combined sample was representative of the geographic distribution of the traveling population, the data were weighted using the city of residence profile.

We also included questions in an omnibus by Gallup Mexico to determine the incidence of travel outside of Mexico for pleasure, to visit family, or for business among upscale Mexicans. The resulting data were used to estimate the size of the Mexican outbound market.



APPENDIX B

ENGLISH QUESTIONNAIRE

SCREENER QUESTIONS

1. Do you or anybody in your household work for a travel agency or airline?

Yes → **(Terminate interview)** No..... → **(Continue)**

2. In the past three years (that is, since November 1999), how many times, in total, have you traveled outside of Mexico?

None → **(Terminate interview)**

One or more **(Write in number)** _____

3a. In the past three years (that is, since November 1999), how many times have you traveled outside of Mexico on a trip that was primarily for vacation? Please include trips taken primarily for shopping. Do not include trips taken primarily to visit family.

None

One or more **(Write in number)** _____

3b. In the past three years, how many times have you traveled outside of Mexico on a trip that was primarily to visit family?

None

One or more **(Write in number)** _____

3c. In the past three years, how many times have you traveled outside of Mexico on a trip that was primarily for business?

None

One or more **(Write in number)** _____

TO QUALIFY, RESPONDENT MUST HAVE TAKEN AT LEAST ONE TRIP IN QUESTION 3A, 3B, OR 3C. OTHERWISE, TERMINATE.

4. Were you away from home for five or more nights on any of the trips that you took outside of Mexico in the past three years for vacation, to visit family, or for business?

Yes → **(Continue)** No → **(Terminate interview)**

5. What is your age, in years? **(Write in age)** _____ years **(Whole numbers only)**

TO QUALIFY, RESPONDENT MUST BE 18 YEARS OF AGE OR OLDER. OTHERWISE, TERMINATE.

(RECORD GENDER—DO NOT ASK) Male..... Female

Interview Location **(Check ONE box)**

Mexico City Guadalajara Monterrey

Highest level of formal education completed **(RECORD FROM AMAI SEL CLASSIFICATION)** **(Check ONE box)**

Educación básica Capacitación para el trabajo
 Educación media superior Refused
 Educación superior

Socioeconomic class **(RECORD FROM AMAI SEL CLASSIFICATION)** **(Check ONE box)**

Class A/B Class C+

IF RESPONDENT MEETS QUOTAS, CONTINUE. OTHERWISE, TERMINATE.

I. PAST TRAVEL AND INTENTIONS

1. Looking at SHOWCARD A, please tell me which places outside of Mexico you visited for vacation or to visit family in the past three years.

(Do NOT read options) (Check ALL that apply) (Probe)

- | | | | | | |
|-----------------------|--------------------------|----------------------|--------------------------|--|--------------------------|
| Central America | <input type="checkbox"/> | Canada | <input type="checkbox"/> | Asia | <input type="checkbox"/> |
| South America | <input type="checkbox"/> | Europe | <input type="checkbox"/> | Oceania (Australia, New Zealand, South Pacific islands)..... | <input type="checkbox"/> |
| The Caribbean | <input type="checkbox"/> | The Middle East..... | <input type="checkbox"/> | Other..... | <input type="checkbox"/> |
| United States | <input type="checkbox"/> | Africa..... | <input type="checkbox"/> | | |

1a. **ASK ONLY IF EUROPE CHECKED IN QUESTION 1.** On your trips to Europe for vacation or to visit family in the past three years, which places did you visit?

(Do NOT read options) (Check ALL that apply) (Probe)

- | | | | | | |
|---------------------|--------------------------|----------------------------|--------------------------|------------------|--------------------------|
| Austria..... | <input type="checkbox"/> | Greece..... | <input type="checkbox"/> | Portugal..... | <input type="checkbox"/> |
| Belgium..... | <input type="checkbox"/> | Holland..... | <input type="checkbox"/> | Romania..... | <input type="checkbox"/> |
| Bulgaria..... | <input type="checkbox"/> | Hungary..... | <input type="checkbox"/> | Russia..... | <input type="checkbox"/> |
| Croatia..... | <input type="checkbox"/> | Iceland..... | <input type="checkbox"/> | Scotland..... | <input type="checkbox"/> |
| Cyprus..... | <input type="checkbox"/> | Ireland (Republic of)..... | <input type="checkbox"/> | Slovenia..... | <input type="checkbox"/> |
| Czech Republic..... | <input type="checkbox"/> | Italy..... | <input type="checkbox"/> | Spain..... | <input type="checkbox"/> |
| Denmark..... | <input type="checkbox"/> | Luxembourg..... | <input type="checkbox"/> | Sweden..... | <input type="checkbox"/> |
| England..... | <input type="checkbox"/> | Malta..... | <input type="checkbox"/> | Switzerland..... | <input type="checkbox"/> |
| Estonia..... | <input type="checkbox"/> | Monaco..... | <input type="checkbox"/> | Turkey..... | <input type="checkbox"/> |
| Finland..... | <input type="checkbox"/> | Northern Ireland..... | <input type="checkbox"/> | Wales..... | <input type="checkbox"/> |
| France..... | <input type="checkbox"/> | Norway..... | <input type="checkbox"/> | Other..... | <input type="checkbox"/> |
| Germany..... | <input type="checkbox"/> | Poland..... | <input type="checkbox"/> | Don't know..... | <input type="checkbox"/> |

2. **ASK ONLY IF UNITED STATES CHECKED IN QUESTION 1.** On your trips to the United States for vacation or to visit family in the past three years, which states did you visit?

(Do NOT read options) (Check ALL that apply) (Probe)

- | | | | | | |
|------------------|--------------------------|---------------------|--------------------------|-----------------------|--------------------------|
| Alabama..... | <input type="checkbox"/> | Louisiana..... | <input type="checkbox"/> | Ohio..... | <input type="checkbox"/> |
| Alaska..... | <input type="checkbox"/> | Maine..... | <input type="checkbox"/> | Oklahoma..... | <input type="checkbox"/> |
| Arizona..... | <input type="checkbox"/> | Maryland..... | <input type="checkbox"/> | Oregon..... | <input type="checkbox"/> |
| Arkansas..... | <input type="checkbox"/> | Massachusetts..... | <input type="checkbox"/> | Pennsylvania..... | <input type="checkbox"/> |
| California..... | <input type="checkbox"/> | Michigan..... | <input type="checkbox"/> | Rhode Island..... | <input type="checkbox"/> |
| Colorado..... | <input type="checkbox"/> | Minnesota..... | <input type="checkbox"/> | South Carolina..... | <input type="checkbox"/> |
| Connecticut..... | <input type="checkbox"/> | Mississippi..... | <input type="checkbox"/> | South Dakota..... | <input type="checkbox"/> |
| Delaware..... | <input type="checkbox"/> | Missouri..... | <input type="checkbox"/> | Tennessee..... | <input type="checkbox"/> |
| Florida..... | <input type="checkbox"/> | Montana..... | <input type="checkbox"/> | Texas..... | <input type="checkbox"/> |
| Georgia..... | <input type="checkbox"/> | Nebraska..... | <input type="checkbox"/> | Utah..... | <input type="checkbox"/> |
| Hawaii..... | <input type="checkbox"/> | Nevada..... | <input type="checkbox"/> | Vermont..... | <input type="checkbox"/> |
| Idaho..... | <input type="checkbox"/> | New Hampshire..... | <input type="checkbox"/> | Virginia..... | <input type="checkbox"/> |
| Illinois..... | <input type="checkbox"/> | New Jersey..... | <input type="checkbox"/> | Washington..... | <input type="checkbox"/> |
| Indiana..... | <input type="checkbox"/> | New Mexico..... | <input type="checkbox"/> | Washington, D.C..... | <input type="checkbox"/> |
| Iowa..... | <input type="checkbox"/> | New York..... | <input type="checkbox"/> | West Virginia..... | <input type="checkbox"/> |
| Kansas..... | <input type="checkbox"/> | North Carolina..... | <input type="checkbox"/> | Wisconsin..... | <input type="checkbox"/> |
| Kentucky..... | <input type="checkbox"/> | North Dakota..... | <input type="checkbox"/> | Wyoming..... | <input type="checkbox"/> |
| | | | | [Don't remember.....] | <input type="checkbox"/> |

3. **ASK ONLY IF CALIFORNIA CHECKED IN QUESTION 2.** On your trips to California for vacation or to visit family in the past three years, did you visit San Diego?

- Yes No

4. **ASK ONLY IF CANADA CHECKED IN QUESTION 1.** On your trips to Canada for vacation or to visit family in the past three years, which provinces did you visit?

(USE SHOWCARD B) (Do NOT read options) (Check ALL that apply) (Probe)

Alberta.....	<input type="checkbox"/>	Northwest Territories.....	<input type="checkbox"/>	Quebec.....	<input type="checkbox"/>
British Columbia.....	<input type="checkbox"/>	Nova Scotia.....	<input type="checkbox"/>	Saskatchewan.....	<input type="checkbox"/>
Manitoba.....	<input type="checkbox"/>	Nunavut.....	<input type="checkbox"/>	Yukon.....	<input type="checkbox"/>
New Brunswick.....	<input type="checkbox"/>	Ontario.....	<input type="checkbox"/>		
Newfoundland.....	<input type="checkbox"/>	Prince Edward Island.....	<input type="checkbox"/>	[Don't know.....]	<input type="checkbox"/>

5. In the past three years, how many nights was your longest trip outside of Mexico?

(Do NOT read options) (Check ONE box)

1 to 4 nights.....	<input type="checkbox"/>	8 to 14 nights.....	<input type="checkbox"/>	22 to 28 nights.....	<input type="checkbox"/>
5 to 7 nights.....	<input type="checkbox"/>	15 to 21 nights.....	<input type="checkbox"/>	29 nights or more.....	<input type="checkbox"/>

6. Now thinking of the past 12 months (that is, since November 2001), how many trips did you take outside of Mexico for vacation or to visit family?

(Write in number) _____ (If NONE, record ZERO) (IF RANGE GIVEN, ASK: Would you say that would be closer to _____ or _____?)

7. Now I am going to read you a list of places. Using the responses on SHOWCARD C, please tell me how much you would like to visit or revisit each one.

(Read ONE place at a time) (Check ONE box for EACH place)

	<u>Extremely</u>	<u>Very Much</u>	<u>Somewhat</u>	<u>Not Very Much</u>	<u>Not at All</u>	<u>Don't Know</u>
Central America.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
South America.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The Caribbean.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
United States.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Canada.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Europe.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The Middle East.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Africa.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Asia.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Oceania (Australia, New Zealand, South Pacific islands).....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

8. Again, using the responses on SHOWCARD C, please tell me how much you would like to visit or revisit each of the following cities on a trip to the United States.

(Read ONE city at a time) (Check ONE box for EACH city)

	<u>Extremely</u>	<u>Very Much</u>	<u>Somewhat</u>	<u>Not Very Much</u>	<u>Not at All</u>	<u>Don't Know</u>
New York.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Washington, D.C.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Chicago.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Orlando.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Miami.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
San Antonio.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Houston.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
San Diego.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Los Angeles.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Las Vegas.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
San Francisco.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

9. Still using the responses on SHOWCARD C, please tell me how much you would like to visit or revisit each of the following places on a trip to Canada.

(Read **ONE** city at a time) (Check **ONE** box for **EACH** city)

	<u>Extremely</u>	<u>Very Much</u>	<u>Somewhat</u>	<u>Not Very Much</u>	<u>Not at All</u>	<u>Don't Know</u>
Calgary.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Montreal.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ottawa.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Quebec City.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Toronto.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Vancouver.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Whistler.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

10. Which countries in Latin America would you want to visit or revisit? Please give me your TOP THREE.

(Do **NOT** read options) (Check **THREE** boxes **ONLY**) (Probe to **THREE**)

Argentina..... <input type="checkbox"/>	Ecuador..... <input type="checkbox"/>	Peru..... <input type="checkbox"/>
Bolivia..... <input type="checkbox"/>	El Salvador..... <input type="checkbox"/>	Uruguay..... <input type="checkbox"/>
Brazil..... <input type="checkbox"/>	Guatemala..... <input type="checkbox"/>	Venezuela..... <input type="checkbox"/>
Chile..... <input type="checkbox"/>	Honduras..... <input type="checkbox"/>	Other..... <input type="checkbox"/>
Colombia..... <input type="checkbox"/>	Nicaragua..... <input type="checkbox"/>	
Costa Rica..... <input type="checkbox"/>	Panama..... <input type="checkbox"/>	Don't know..... <input type="checkbox"/>
Cuba..... <input type="checkbox"/>	Paraguay..... <input type="checkbox"/>	

11. (USE SHOWCARD C) More specifically, please tell me how much you would like to visit or revisit Costa Rica.

(Check **ONE** box)

Extremely..... Very Much..... Somewhat..... Not Very Much..... Not at All..... [Don't Know ..

12. Which countries in Europe would you want to visit or revisit? Please give me your TOP THREE.

(Do **NOT** read options) (Check **THREE** boxes **ONLY**) (Probe to **THREE**)

Austria..... <input type="checkbox"/>	Greece..... <input type="checkbox"/>	Portugal..... <input type="checkbox"/>
Belgium..... <input type="checkbox"/>	Holland..... <input type="checkbox"/>	Romania..... <input type="checkbox"/>
Bulgaria..... <input type="checkbox"/>	Hungary..... <input type="checkbox"/>	Russia..... <input type="checkbox"/>
Croatia..... <input type="checkbox"/>	Iceland..... <input type="checkbox"/>	Scotland..... <input type="checkbox"/>
Cyprus..... <input type="checkbox"/>	Ireland (Republic of)..... <input type="checkbox"/>	Slovenia..... <input type="checkbox"/>
Czech Republic..... <input type="checkbox"/>	Italy..... <input type="checkbox"/>	Spain..... <input type="checkbox"/>
Denmark..... <input type="checkbox"/>	Luxembourg..... <input type="checkbox"/>	Sweden..... <input type="checkbox"/>
England..... <input type="checkbox"/>	Malta..... <input type="checkbox"/>	Switzerland..... <input type="checkbox"/>
Estonia..... <input type="checkbox"/>	Monaco..... <input type="checkbox"/>	Turkey..... <input type="checkbox"/>
Finland..... <input type="checkbox"/>	Northern Ireland..... <input type="checkbox"/>	Wales..... <input type="checkbox"/>
France..... <input type="checkbox"/>	Norway..... <input type="checkbox"/>	Other..... <input type="checkbox"/>
Germany..... <input type="checkbox"/>	Poland..... <input type="checkbox"/>	Don't know..... <input type="checkbox"/>

13. Now looking again at SHOWCARD A, please tell me which places you are likely to visit for vacation or to visit family in the next two years?

(Do **NOT** read options) (Check **ALL** that apply)

Central America..... <input type="checkbox"/>	Canada..... <input type="checkbox"/>	Asia..... <input type="checkbox"/>
South America..... <input type="checkbox"/>	Europe..... <input type="checkbox"/>	Oceania (Australia, New Zealand, South Pacific islands)..... <input type="checkbox"/>
The Caribbean..... <input type="checkbox"/>	The Middle East..... <input type="checkbox"/>	Other..... <input type="checkbox"/>
United States..... <input type="checkbox"/>	Africa..... <input type="checkbox"/>	

14. Still looking at SHOWCARD A, please tell me which places you have ever visited for any reason.

(Do **NOT** read options) (Check **ALL** that apply) (Probe)

Central America..... <input type="checkbox"/>	Canada..... <input type="checkbox"/>	Asia..... <input type="checkbox"/>
South America..... <input type="checkbox"/>	Europe..... <input type="checkbox"/>	Oceania (Australia, New Zealand, South Pacific islands)..... <input type="checkbox"/>
The Caribbean..... <input type="checkbox"/>	The Middle East..... <input type="checkbox"/>	Other..... <input type="checkbox"/>
United States..... <input type="checkbox"/>	Africa..... <input type="checkbox"/>	

15. **ASK ONLY IF UNITED STATES CHECKED IN QUESTION 14.** Have you ever visited San Diego?

Yes..... No

16. Have you ever taken an ocean cruise of three or more nights duration?

Yes..... No

17. How likely are you to take an ocean cruise within the next two years? Would you say very likely, somewhat likely, or not likely?

(Check **ONE** box)

Very likely Somewhat likely..... Not likely

18. PROPRIETARY QUESTION.

19. PROPRIETARY QUESTION.

20. PROPRIETARY QUESTION.

21. PROPRIETARY QUESTION.

II. MOTIVATIONS, ATTITUDES, AND PREFERENCES

1. (USE SHOWCARD F) How likely would you be to take each of the following types of trips?

(Read **EACH** type of trip **ONE** at a time) (Check **ONE** box for **EACH** type of trip) (ROTATE)

	Highly Likely	Somewhat Likely	Not Likely	Don't Know
A general sightseeing trip spent seeing the highlights of a destination	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
A trip with a strong emphasis on education and culture	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
An trip focused on nature and ecology.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
A trip built around casinos and gambling	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
A trip built around an outdoor activity such as skiing, rafting, hiking, or bicycling	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
A beach vacation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

2. And, how likely would you be to travel to the United States for the following reasons?

(Read **ONE** reason at a time) (Check **ONE** box for **EACH** reason)

	Highly Likely	Somewhat Likely	Not Likely	Don't Know
To visit amusement or theme parks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
To go to casinos and shows.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
To shop.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
To visit national parks.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
To see places associated with the movie industry	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

3. **(USE SHOWCARD F)** How likely are you to engage in each of the following activities on a trip outside of Mexico?

(Read **EACH** activity **ONE** at a time) (Check **ONE** box for **EACH** activity)

	<u>Highly Likely</u>	<u>Somewhat Likely</u>	<u>Not Likely</u>	<u>Don't Know</u>
Visit sites of historical interest	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Visit museums or art galleries	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Go to the opera or ballet.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Try local cuisine	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Walk around and soak in the ambience of a place .	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Tour a winery	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Visit national parks and wilderness areas	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Go to amusement or theme parks.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Attend a sporting event.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Go to nightclubs, dancing, etc.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Go to a casino, gamble.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Eat at a well-known restaurant	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Spend a few days at a beach	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Go shopping	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

4. And now looking at outdoor activities, please tell me how likely you are to do each of the following activities.

(Read **EACH** activity **ONE** at a time) (Check **ONE** box for **EACH** activity)
(If necessary, remind respondent to use responses on SHOWCARD F)

	<u>Highly Likely</u>	<u>Somewhat Likely</u>	<u>Not Likely</u>	<u>Don't Know</u>
Hiking.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Bicycling.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Swimming.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Golf	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fishing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Tennis	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Snow skiing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Rafting or kayaking.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Scuba diving.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

5. In the past 12 months, have you taken any trips outside of Mexico primarily for shopping?

Yes..... No

6. And, in the past 12 months, have you taken any trips outside of Mexico primarily for skiing?

Yes..... No

7. **(USE SHOWCARD G)** How do you generally prefer to travel when you take a trip outside of Mexico?

(Do **NOT** read options) (Check **ONE** box)

- On an escorted group tour.....
- Independently, on a vacation package
- Independently, on a custom-designed itinerary, with most hotels, local transportation, and sightseeing arranged before you leave home.....
- Independently, without most hotels, local transportation, and sightseeing arranged before you leave home

8. I am now going to read you a series of statements. Using the responses on SHOWCARD H, please tell me the extent to which you agree or disagree with each of the following statements.

(Read **ONE** statement at a time) (Check **ONE** box for **EACH** statement)

	Agree Strongly	Agree Somewhat	Disagree Somewhat	Disagree Strongly	Don't Know
I think of international travel as an investment in the education of my children	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
International travel is common among my circle of friends	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
On vacation, I tend to treat myself and my family to the best that I can afford	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Comfort and convenience are a priority for me when I travel outside of Mexico	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I like others to make the arrangements and handle all the details for me	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I prefer to return to places that I already know rather than experiment with a new place	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I feel a little uneasy in places where Spanish is not spoken	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
For me, an international trip is more of a special event than routine	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I usually don't read much about the countries that I am planning to visit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I am able to take an international trip at any time of the year	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
If I were to rent a car, it would be worth a few extra dollars to rent from one of the major companies like Hertz or Avis	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
It is cheaper to vacation outside of Mexico ..	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
It is safer to vacation outside of Mexico	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
When traveling to <u>Canada</u> , it is cheaper to buy a vacation package than to buy air, ground, and hotel on your own	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

8a. (USE SHOWCARD F) How likely is it that the procedure necessary to obtain a U.S. visa would make you want to travel elsewhere?

(Check **ONE** box)

Highly Likely Somewhat Likely Not Likely [Don't know...

8b. (USE SHOWCARD F) And, how likely is it that the arrival procedure at the U.S. border would make you want to travel elsewhere?

(Check **ONE** box)

Highly Likely Somewhat Likely Not Likely [Don't know...

9. When taking a trip outside of Mexico, on which of the following aspects of your trip are you likely to splurge?

(Read **ONE** aspect at a time) (Check **ONE** box for **EACH** aspect)

	Yes	No
Lodging	<input type="checkbox"/>	<input type="checkbox"/>
Dining	<input type="checkbox"/>	<input type="checkbox"/>
Shopping	<input type="checkbox"/>	<input type="checkbox"/>
Tickets to cultural activities and entertainment	<input type="checkbox"/>	<input type="checkbox"/>
Tours and excursions	<input type="checkbox"/>	<input type="checkbox"/>

10. Because of the events of September 11, 2001, and the ongoing threat of terrorism, have you done any of the following?

(Read **ONE** statement at a time) (Check **ONE** box for **EACH** statement)

	<u>Yes</u>	<u>No</u>
Taken fewer trips outside of Mexico	<input type="checkbox"/>	<input type="checkbox"/>
Traveled within Mexico instead of internationally	<input type="checkbox"/>	<input type="checkbox"/>
Cancelled a planned trip	<input type="checkbox"/>	<input type="checkbox"/>
Traveled by land instead of by air	<input type="checkbox"/>	<input type="checkbox"/>

11. If you were visiting Canada, which of the following activities would you enjoy?

(Read **ONE** activity at a time) (Check **ONE** box for **EACH** activity)

	<u>Yes</u>	<u>No</u>
Trying a winter activity like skiing or dogsledding	<input type="checkbox"/>	<input type="checkbox"/>
Attending a cultural event/festival.....	<input type="checkbox"/>	<input type="checkbox"/>
Relaxing in a sidewalk café	<input type="checkbox"/>	<input type="checkbox"/>
Shopping.....	<input type="checkbox"/>	<input type="checkbox"/>
Traditional activities (museums, art galleries, music, dance).....	<input type="checkbox"/>	<input type="checkbox"/>
Whale watching	<input type="checkbox"/>	<input type="checkbox"/>
Kayaking/canoeing	<input type="checkbox"/>	<input type="checkbox"/>
Hiking.....	<input type="checkbox"/>	<input type="checkbox"/>
Visiting a spa	<input type="checkbox"/>	<input type="checkbox"/>
Experiencing aboriginal culture	<input type="checkbox"/>	<input type="checkbox"/>
Downhill skiing.....	<input type="checkbox"/>	<input type="checkbox"/>
Cross country skiing	<input type="checkbox"/>	<input type="checkbox"/>

12. (**USE SHOWCARD H**) Please tell me the extent to which you agree or disagree with each of the following statements about Canada.

(Read **ONE** statement at a time) (Check **ONE** box for **EACH** statement)

	<u>Agree Strongly</u>	<u>Agree Somewhat</u>	<u>Disagree Somewhat</u>	<u>Disagree Strongly</u>	<u>Don't Know</u>
Canada is a safe country in which to travel	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Canada is a good destination for the whole family ..	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Canada has sophisticated and culturally interesting cities.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Canada has spectacular scenery	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I would visit Canada at any time of year	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Canada has high-quality skiing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The cost of the airfare to get to Canada puts me off	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The French influence is one of the key reasons for visiting Canada	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Overall, Canada offers good value for the money ..	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I know very little about traveling in Canada	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

13. (USE SHOWCARD I) How do you think Canada rates on each of the following dimensions?

(Read ONE statement at a time) (Check ONE box for EACH statement)

	<u>Excellent</u>	<u>Good</u>	<u>Fair</u>	<u>Poor</u>	<u>Have No Idea</u>
Shopping	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Hotels	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Dining/restaurants	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Variety of things to do	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Historical attractions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Nightlife/entertainment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Outdoor sports and activities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Quality of service.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Entry requirements.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Friendly to Mexicans	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Convenient air service from Mexico.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

III. TRAVEL PLANNING AND INFORMATION

Now I would like to ask you some questions about how you plan your trips outside of Mexico.

1. Looking at SHOWCARD F, if you wanted to learn more about a destination as a place to visit, how likely would you be to do each of the following?

(Read ONE statement at a time) (Check ONE box for EACH statement)

	<u>Highly Likely</u>	<u>Somewhat Likely</u>	<u>Not Likely</u>	<u>Don't Know</u>
Ask a travel agent.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Talk with people who have been there	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Search the Internet	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Look in travel magazines.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Obtain travel brochures	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact tourist offices or embassies.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

2. For your trips outside of Mexico, when do you typically purchase or arrange [INSERT COMPONENT]? Before your departure or after your arrival at the destination?

(Insert EACH component in order) (Repeat instruction as necessary) (Check ONE box for EACH component)

	<u>Before Departure</u>	<u>After Arrival</u>	<u>Does Not Apply</u>
Admission to events (theme parks, theater, etc.) ...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lodging	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Rental car.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sightseeing tours	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

3. Which of the magazines on SHOWCARD J do you read regularly?

(Do NOT read options) (Check ALL that apply) (Probe)

Bon Vivant	<input type="checkbox"/>	GQ.....	<input type="checkbox"/>	Quo.....	<input type="checkbox"/>
Condé Nast.....	<input type="checkbox"/>	Kena.....	<input type="checkbox"/>	Travel and Leisure.....	<input type="checkbox"/>
Conozca Más.....	<input type="checkbox"/>	La Onda	<input type="checkbox"/>	Tu	<input type="checkbox"/>
Contenido	<input type="checkbox"/>	Men's Health.....	<input type="checkbox"/>	Vanidades	<input type="checkbox"/>
Cosmopolitan.....	<input type="checkbox"/>	Milenio.....	<input type="checkbox"/>	Vogue	<input type="checkbox"/>
Eres	<input type="checkbox"/>	Muy Interesante	<input type="checkbox"/>	Vuelo	<input type="checkbox"/>
Escala	<input type="checkbox"/>	National Geographic en español	<input type="checkbox"/>	None of these	<input type="checkbox"/>
Fama.....	<input type="checkbox"/>	Padres e Hijos.....	<input type="checkbox"/>		
Geomunda.....	<input type="checkbox"/>	Proceso.....	<input type="checkbox"/>	[Don't read magazines	<input type="checkbox"/>

4. Which of the newspapers on SHOWCARD K do you read regularly?

(Do **NOT** read options) (Check **ALL** that apply) (Probe)

- | | | |
|---|--|--|
| El Financiero..... <input type="checkbox"/> | Novedades <input type="checkbox"/> | El Público (GDL.)..... <input type="checkbox"/> |
| El Universal <input type="checkbox"/> | Reforma..... <input type="checkbox"/> | El Metro (MTY.) <input type="checkbox"/> |
| Esto..... <input type="checkbox"/> | Uno más Uno <input type="checkbox"/> | El Norte (MTY.)..... <input type="checkbox"/> |
| Excelsior <input type="checkbox"/> | El Informador (GDL.)..... <input type="checkbox"/> | El Sol de Monterrey (MTY.)..... <input type="checkbox"/> |
| La Jornada..... <input type="checkbox"/> | El Mural (GDL.) <input type="checkbox"/> | Extra (MTY.) <input type="checkbox"/> |
| La Prensa <input type="checkbox"/> | El Occidental (GDL.) <input type="checkbox"/> | Milenio Diario de Monterrey (MTY.) .. <input type="checkbox"/> |
| Milenio <input type="checkbox"/> | El Ocho Columnas (GDL.) <input type="checkbox"/> | None of these <input type="checkbox"/> |

Don't read newspapers → (Skip to Qu. 6)

5. Do you read the travel section of your local newspaper regularly?

Yes..... No

6. Does your household subscribe to cable television?

Yes..... No

7. Have you ever purchased anything (travel or anything else) on the Internet?

Yes..... No

8. Do you currently have access to the Internet?

Yes..... No

9. (USE SHOWCARD H) Please tell me the extent to which you agree or disagree with each of the following statements.

(Read **ONE** statement at a time) (Check **ONE** box for **EACH** statement)

	<u>Agree Strongly</u>	<u>Agree Somewhat</u>	<u>Disagree Somewhat</u>	<u>Disagree Strongly</u>	<u>Don't Know</u>
I would be reluctant to use my credit card on the Internet.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The Internet is fine for gathering information, but I would rather purchase through a travel agent or airline.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

10. Do you have an e-mail address?

Yes..... → (Continue) No..... → (Skip to Section IV, Qu. 1)

11. Would you like to receive information on special offers for travel via e-mail?

Yes..... No

IV. TRANSPORTATION

1. (USE SHOWCARD L) In choosing an airline for a trip outside of Mexico, which factor is most important to you?

(Do **NOT** read options) (Check **ONE** box)

- | | | | |
|--|--------------------------|--|--------------------------|
| A reputation for excellent service | <input type="checkbox"/> | Mileage credit in a frequent flyer program | <input type="checkbox"/> |
| The lowest fare | <input type="checkbox"/> | The most convenient schedule | <input type="checkbox"/> |

2. **(USE SHOWCARD I)** What is your perception of **[INSERT FIRST AIRLINE]** for international travel?

(Check ONE box for EACH airline) (Repeat instruction as necessary) (RANDOM START)

	<u>Excellent</u>	<u>Good</u>	<u>Fair</u>	<u>Poor</u>	<u>Have No Idea</u>
Aeroméxico	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Air Canada	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Air France.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
America West.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
American Airlines	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
British Airways.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Continental Airlines	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Delta Air Lines	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Grupo Taca	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Iberia	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lan Chile	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Mexicana	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Northwest Airlines	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
United Airlines	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

3. **(USE SHOWCARD M)** In general, how do you think the major Mexican airlines compare with the major foreign airlines on **[INSERT CHARACTERISTIC]**?

(Check ONE box for EACH characteristic) (Repeat instruction as necessary)

	<u>Major Mexican Airlines Better</u>	<u>About the Same</u>	<u>Major Foreign Airlines Better</u>	<u>Have No Idea</u>
Meals.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
In-flight service	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
On-time performance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Aircraft maintenance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

4. Do you belong to any frequent flyer programs?

Yes..... No

5. When taking a trip to the United States, do you generally prefer to fly a Mexican airline or a U.S. airline?

(Check ONE box)

A Mexican airline

A U.S. airline.....

[Indifferent.....

6. When taking an international trip, do you generally prefer to fly a Mexican airline or an airline of the country you are visiting (for example, British Airways to Great Britain or Air Canada to Canada)?

(Check ONE box)

A Mexican airline

An airline of the country you are visiting.....

[Indifferent.....

V. YOUR MOST RECENT TRIP

Now I am going to ask you about your MOST RECENT trip outside of Mexico that was primarily for vacation or to visit family. Please answer only for that one trip.

1. Again looking at SHOWCARD A, which places listed did you visit on your MOST RECENT trip?

(Do NOT read options) (Check ALL that apply) (Probe)

- | | | | | | |
|-----------------------|--------------------------|----------------------|--------------------------|----------------------------------|--------------------------|
| Central America | <input type="checkbox"/> | Canada | <input type="checkbox"/> | Asia | <input type="checkbox"/> |
| South America | <input type="checkbox"/> | Europe | <input type="checkbox"/> | Oceania (Australia, New Zealand, | |
| The Caribbean | <input type="checkbox"/> | The Middle East..... | <input type="checkbox"/> | South Pacific islands)..... | <input type="checkbox"/> |
| United States | <input type="checkbox"/> | Africa..... | <input type="checkbox"/> | Other..... | <input type="checkbox"/> |

2. Was this trip primarily for vacation or primarily to visit family?

- Primarily for vacation Primarily to visit family.....

3. **(USE SHOWCARD N)** Which of the listed factors influenced your choice of destination for this trip (that is, your MOST RECENT trip outside of Mexico that was primarily for vacation or to visit family)?

(Do NOT read options) (Check ALL that apply) (Probe)

- | | | | |
|---|--------------------------|--|--------------------------|
| Especially good fare or package..... | <input type="checkbox"/> | Television advertisement | <input type="checkbox"/> |
| Favorable exchange rate | <input type="checkbox"/> | Unsolicited literature received in the mail | <input type="checkbox"/> |
| A previous visit..... | <input type="checkbox"/> | Information obtained on the Internet | <input type="checkbox"/> |
| Offers something for the whole family | <input type="checkbox"/> | A movie or book | <input type="checkbox"/> |
| Recommendation of a travel agent..... | <input type="checkbox"/> | Editorial/article in a magazine or newspaper | <input type="checkbox"/> |
| Talking to someone who had been there | <input type="checkbox"/> | Could drive there from Mexico | <input type="checkbox"/> |
| Have friends living there | <input type="checkbox"/> | Could fly to a border town and drive there from | |
| Have family living there..... | <input type="checkbox"/> | Mexico..... | <input type="checkbox"/> |
| Magazine or newspaper advertisement..... | <input type="checkbox"/> | None of these | <input type="checkbox"/> |

4. In which month did you begin this trip? **(Check ONE box)**

- | | | | | | | | | | | | |
|---------------|--------------------------|-------------|--------------------------|-----------|--------------------------|-------------|--------------------------|--------------|--------------------------|---------------|--------------------------|
| January | <input type="checkbox"/> | March | <input type="checkbox"/> | May | <input type="checkbox"/> | July..... | <input type="checkbox"/> | September.. | <input type="checkbox"/> | November | <input type="checkbox"/> |
| February | <input type="checkbox"/> | April | <input type="checkbox"/> | June..... | <input type="checkbox"/> | August..... | <input type="checkbox"/> | October..... | <input type="checkbox"/> | December | <input type="checkbox"/> |

5. In total, about how many nights were you away from home on your most recent trip outside of Mexico?

(Write in number) _____ **(If NONE, record ZERO) (IF RANGE GIVEN, ASK: Would you say that would be closer to _____ or _____?)**

6. How many cities did you visit on this trip?

(Write in number) _____ **(If NONE, record ZERO) (IF RANGE GIVEN, ASK: Would you say that would be closer to _____ or _____?)**

7. This next question is about the size of your immediate traveling party. Please do NOT include group tour members unless you planned to travel with them before booking the trip.

(Read EACH question in order) (Write in number) (If NONE, record ZERO)

Including yourself, how many adults, age 18 or older, were in your immediate traveling party? _____

How many children age 12 to 17 were in your immediate traveling party? _____

How many children under age 12 were in your immediate traveling party? _____

8. Using the responses on SHOWCARD O, please tell me who accompanied you on this trip.

(Do NOT read options) (Check ALL that apply)

- | | | | | | |
|--------------------------|--------------------------|--------------------------------|--------------------------|---------------------|--------------------------|
| No one else | <input type="checkbox"/> | Grandchild(ren) under 18 | <input type="checkbox"/> | Other couples | <input type="checkbox"/> |
| Spouse/partner | <input type="checkbox"/> | Child(ren) 18 or over..... | <input type="checkbox"/> | Friend(s) | <input type="checkbox"/> |
| Child(ren) under 12..... | <input type="checkbox"/> | Parents | <input type="checkbox"/> | Other | <input type="checkbox"/> |
| Child(ren) 12 to 17..... | <input type="checkbox"/> | Other relative(s)..... | <input type="checkbox"/> | | |

8a. Who of those who went on this trip had the most influence on the destination selection?

(Do **NOT** read options) (Check **ALL** that apply)

- Myself Grandchild(ren) under 18 Other couples
- Spouse/partner Child(ren) 18 or over..... Friend(s)
- Child(ren) under 12..... Parents Other
- Child(ren) 12 to 17..... Other relative(s).....

9. Thinking again about your **MOST RECENT** trip outside of Mexico, please tell me, using the responses on SHOWCARD P, how you traveled during most of this trip?

(Check **ONE** box)

- On an ocean cruise
- On an escorted group tour.....
- On a vacation package.....
- On a custom-designed itinerary with advance reservations.....
- Largely without advance reservations

10. (USE SHOWCARD Q) What types of accommodations did you use on this trip?

(Do **NOT** read options) (Check **ALL** that apply)

- Deluxe hotel..... Suites hotel..... Cruise ship.....
- First class hotel..... Time-share condominium The home of friends.....
- Moderate hotel..... Family vacation home..... The home of relatives
- Budget hotel Rental condominium..... Other.....

11. Did you rent a car on your most recent trip? Yes..... No.....

12. Did you use a travel agent for this trip? Yes..... → (Continue) No..... → (Skip to Qu. 14)

13. In which of the ways listed on SHOWCARD R did you use a travel agent for this trip?

(Do **NOT** read options) (Check **ALL** that apply)

- To help select the destination(s).....
- To plan your itinerary
- To plan activities and choose attractions.....
- To arrange hotels or other lodging.....
- To purchase airline tickets.....
- To purchase a group tour, vacation package, or cruise

14. Did you use the Internet for this trip? Yes..... → (Continue) No..... → (Skip to Qu. 16)

15. In which of the ways listed on SHOWCARD R did you use the Internet for this trip?

(Do **NOT** read options) (Check **ALL** that apply)

- To help select the destination(s).....
- To plan your itinerary
- To plan activities and choose attractions.....
- To arrange hotels or other lodging.....
- To purchase airline tickets.....
- To purchase a group tour, vacation package, or cruise

16. (USE SHOWCARD S) Thinking about your most recent trip outside of Mexico that was primarily for vacation or to visit family, how far in advance of departure did you [INSERT STATEMENT]?

(Read **ONE** statement at a time) (Check **ONE** box for **EACH** statement)

	Less Than 2 Weeks	2 to 4 Weeks	1 to 3 Months	4 to 6 Months	7 Months or More	Does Not Apply
Decide on the destination.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Set the date for the trip.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Purchase airline tickets.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

17. Was this your first trip outside of Mexico? Yes No
18. **(USE SHOWCARD T)** In total, approximately how much, per person, in US dollars did you spend on this trip? Include everything related to this trip.
- (Do NOT read options) (Check ONE box)**
- | | | |
|--|--|---|
| Less than US\$500..... <input type="checkbox"/> | US\$2,000 to US\$2,999..... <input type="checkbox"/> | US\$5,000 or more..... <input type="checkbox"/> |
| US\$500 to US\$999..... <input type="checkbox"/> | US\$3,000 to US\$3,999..... <input type="checkbox"/> | [Don't know..... <input type="checkbox"/> |
| US\$1,000 to US\$1,999..... <input type="checkbox"/> | US\$4,000 to US\$4,999..... <input type="checkbox"/> | |

VI. BUSINESS TRAVEL

The questions in this section ask about BUSINESS TRIPS that you, personally, took outside of Mexico. Please do not include trips taken primarily for vacation or to visit family.

1. In the past three years (that is, since November 1999), how many business trips have you, personally, taken outside of Mexico in which you were away one night or more?
- None → **(Skip to Section VII, Qu. 1)**
 One or more **(Write in number)** _____ → **(Continue)**
2. To how many of these business trips did you add two nights or more of vacation travel?
- (Write in number)** _____ **(If NONE, record ZERO) (IF RANGE GIVEN, ASK: Would you say that would be closer to ____ or ____?)**
3. Did your spouse or someone other than a business associate accompany you on one or more business trips outside of Mexico in the past three years?
- Yes..... No.....
4. Did any children under 18 years of age accompany you on one or more business trips outside of Mexico in the past three years?
- Yes..... No.....
5. Referring again to SHOWCARD A, where have you traveled for business in the past three years?
- (Do NOT read options) (Check ALL that apply) (Probe)**
- | | | |
|---|---|---|
| Central America..... <input type="checkbox"/> | Canada..... <input type="checkbox"/> | Asia..... <input type="checkbox"/> |
| South America..... <input type="checkbox"/> | Europe..... <input type="checkbox"/> | Oceania (Australia, New Zealand, South Pacific islands)..... <input type="checkbox"/> |
| The Caribbean..... <input type="checkbox"/> | The Middle East..... <input type="checkbox"/> | Other..... <input type="checkbox"/> |
| United States..... <input type="checkbox"/> | Africa..... <input type="checkbox"/> | |
6. **ASK ONLY IF CANADA CHECKED IN QUESTION 5.** How many business trips have you taken to Canada in the past three years?
- (Write in number)** _____ **(IF RANGE GIVEN, ASK: Would you say that would be closer to ____ or ____?)**
7. In total, about how many nights were you away from home on your most recent business trip outside of Mexico?
- (Write in number)** _____ **(If NONE, record ZERO) (IF RANGE GIVEN, ASK: Would you say that would be closer to ____ or ____?)**
8. In the past three years, did you travel outside of Mexico to attend a corporate meeting (that is, a training seminar, sales meeting, stockholder meeting, etc.)?
- Yes..... No.....

VII. BACKGROUND INFORMATION

Finally, I would like to ask you some questions about yourself. All answers will be treated as strictly confidential.

1. Are you married? Yes..... No.....
2. Do you have any children under 18 years of age living in your household?
 Yes..... → (Continue) No..... → (Skip to Qu. 4)

3. How many children are [INSERT AGE RANGE FROM TABLE]?
 (Check **ONE** box for **EACH** age range) (Repeat instruction as necessary)

	<u>None</u>	<u>One</u>	<u>Two</u>	<u>Three</u>	<u>Four</u>	<u>Five</u>	<u>Six or More</u>
Under 6 years of age	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Between 6 and 12 years of age	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Between 13 and 17 years of age	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

4. Which languages (other than Spanish) do you speak?
 No other language..... Italian.....
 English..... German.....
 French..... Other.....
5. Which, if any, credit cards do you, personally, own? (Do **NOT** read options) (Check **ALL** that apply) (Probe)
 American Express MasterCard..... Other.....
 Diners Club Visa..... None.....
 Discover.....
6. In the past three years, have you traveled outside of Mexico to attend a meeting or convention of an association (that is, a trade association, professional or educational society) either as a delegate or as the spouse/guest of a delegate?
 Yes..... No.....
7. In the past three years, have you traveled outside of Mexico on any incentive/award trips (that is, trips paid for by your employer, or your spouse's employer, as a sales incentive or other award)?
 Yes..... No.....
8. In the past three years, have you traveled to the United States for medical treatment for yourself or as the companion of someone seeking medical treatment?
 Yes..... No.....
9. Do you currently hold a valid passport issued by a European country?
 Yes..... No.....
10. Do you currently have a visa to visit the United States?
 Yes..... No.....
11. As a final question, in the past 12 months (that is, since November 2001), how many trips have you taken WITHIN Mexico primarily for vacation in which you were away from home for two or more nights?
 (Write in number) _____ (If **NONE**, record **ZERO**) (IF RANGE GIVEN, ASK: Would you say that would be closer to _____ or _____?)



APPENDIX C

SPANISH QUESTIONNAIRE

PREGUNTAS DE FILTRO

1. ¿Trabaja usted o algún miembro de su hogar en una agencia de viajes o aerolínea?
 Sí → **(Termine entrevista)** No..... → **(Continúe)**
2. En los últimos tres años, (o sea, desde noviembre de 1999) ¿cuántas veces, en total, ha viajado fuera de México?
 Ninguna → **(Termine entrevista)**
 Una o más **(Escriba el número)** _____
- 3a. En los últimos tres años (o sea, desde noviembre de 1999), ¿cuántas veces ha viajado fuera de México principalmente por vacaciones? Por favor incluya viajes que se hayan realizado principalmente para ir de compras. No incluya los viajes realizados principalmente para visitar a familiares.
 Ninguna
 Una o más **(Escriba el número)** _____
- 3b. En los últimos tres años, ¿cuántas veces ha viajado fuera de México principalmente para visitar a familiares?
 Ninguna
 Una o más **(Escriba el número)** _____
- 3c. En los últimos tres años, ¿cuántas veces ha viajado fuera de México principalmente por razones de negocios?
 Ninguna
 Una o más **(Escriba el número)** _____

PARA CALIFICAR, EL PARTICIPANTE DEBE HABER VIAJADO POR LO MENOS UNA VEZ BAJO LA PREGUNTA 3A, 3B, Ó 3C. DE LO CONTRARIO, TERMINE LA ENTREVISTA.

4. ¿Estuvo usted fuera de casa por cinco o más noches en cualquiera de los viajes que hizo fuera de México en los últimos tres años para visitar familiares, ir de vacaciones, o razones de negocios?
 Sí → **(Continúe)** No → **(Termine entrevista)**
5. ¿Cuántos años tiene? **(Escriba la edad)** _____ años **(Números enteros solamente)**

PARA CALIFICAR, EL PARTICIPANTE DEBE TENER 18 AÑOS O MÁS. DE LO CONTRARIO, TERMINE LA ENTREVISTA.

(REGISTRE EL GÉNERO – NO PREGUNTE) Masculino Femenino

Ubicación de la entrevista **(Marque UNA casilla)**

Ciudad de México..... Guadalajara..... Monterrey

Último año de educación formal completo **(UTILICE CLASIFICACIÓN DE N.S.E. DE AMAI)** **(Marque UNA casilla)**

Educación básica Capacitación para el trabajo
 Educación media superior..... Rehusó.....
 Educación superior.....

Nivel socioeconómico **(UTILICE CLASIFICACIÓN DE N.S.E. DE AMAI)** **(Marque UNA casilla)**

Nivel A/B..... Nivel C+

SI EL PARTICIPANTE SATISFACE LAS CUOTAS, CONTINÚE. DE LO CONTRARIO, TERMINE LA ENTREVISTA.

I. VIAJES PASADOS E INTENCIONES

1. Utilizando la TARJETA A, por favor, dígame qué lugares, fuera de México, visitó en los últimos tres años en vacaciones o para visitar familiares.

(NO lea las opciones) (Marque TODAS las que correspondan) (Sondee)

América Central	Canadá	Asia
América del Sur	Europa	Oceanía (Australia, Nueva Zelanda, Islas del Pacífico Sur)
El Caribe	El Medio Oriente	Otro
Estados Unidos	África	

- 1a. **PREGUNTE SÓLO SI SE MARCÓ EUROPA EN LA PREGUNTA 1.** En sus viajes a Europa por vacaciones o para visitar familiares, en los últimos tres años, qué países visitó?

(NO lea las opciones) (Marque TODAS las que correspondan) (Sondee)

Alemania	Francia	Mónaco
Austria	Gales	Noruega
Bélgica	Grecia	Otro
Bulgaria	Holanda	Polonia
Croacia	Hungría	Portugal
Chipre	Inglaterra	Republica Checa
Dinamarca	Irlanda (Republica de)	Rumania
Escocia	Irlanda del Norte	Rusia
Eslovenia	Islandia	Suecia
España	Italia	Suiza
Estonia	Luxemburgo	Turquía
Finlandia	Malta	No Sabe

2. **PREGUNTE SÓLO SI SE MARCÓ ESTADOS UNIDOS EN LA PREGUNTA 1.** En sus viajes a los Estados Unidos por vacaciones o para visitar familiares, en los últimos tres años, ¿qué estados visitó?

(NO lea las opciones) (Marque TODAS las que correspondan) (Sondee)

Alabama	Indiana	Nevada
Alaska	Iowa	New Hampshire
Arizona	Kansas	Ohio
Arkansas	Kentucky	Oklahoma
California	Luisiana	Oregon
Carolina del Norte	Maine	Pensilvania
Carolina del Sur	Maryland	Rhode Island
Colorado	Massachussets	Tennessee
Connecticut	Michigan	Texas
Dakota del Norte	Minnesota	Utah
Dakota del Sur	Mississippi	Vermont
Delaware	Missouri	Virginia
Florida	Montana	Washington
Georgia	Nebraska	Washington, D.C.
Hawai	Nueva Jersey	West Virginia
Idaho	Nueva York	Wisconsin
Illinois	Nuevo México	Wyoming
		[No recuerdo

3. **PREGUNTE SÓLO SI SE MARCÓ CALIFORNIA EN LA PREGUNTA 2.** En sus viajes a California por vacaciones o visitas a familiares en los últimos tres años, ¿fue a San Diego?

Sí No

4. **PREGUNTE SÓLO SI SE MARCÓ CANADÁ EN LA PREGUNTA 1.** En sus viajes a Canadá por vacaciones o visitas a familiares en los últimos tres años, ¿qué provincias visitó?

(UTILICE TARJETA B) (NO lea las opciones) (Marque TODAS las que correspondan) (Sondee)

- | | | | | | |
|----------------------------|--------------------------|---------------------|--------------------------|-------------------------------|--------------------------|
| Alberta..... | <input type="checkbox"/> | Nueva Escocia | <input type="checkbox"/> | Terra Nova | <input type="checkbox"/> |
| Columbia Británica..... | <input type="checkbox"/> | Nunavut..... | <input type="checkbox"/> | Territorios de Noroeste | <input type="checkbox"/> |
| Isla Príncipe Eduardo..... | <input type="checkbox"/> | Ontario..... | <input type="checkbox"/> | Yukon | <input type="checkbox"/> |
| Manitoba | <input type="checkbox"/> | Québec..... | <input type="checkbox"/> | | |
| Nueva Brunswick | <input type="checkbox"/> | Saskatchewan..... | <input type="checkbox"/> | [No sabe | <input type="checkbox"/> |

5. En los últimos tres años, ¿de cuántas noches fue su viaje más largo fuera de México?

(NO lea las opciones) (Marque UNA casilla)

- | | | | | | |
|--------------------|--------------------------|---------------------|--------------------------|----------------------|--------------------------|
| 1 a 4 noches | <input type="checkbox"/> | 8 a 14 noches..... | <input type="checkbox"/> | 22 a 28 noches..... | <input type="checkbox"/> |
| 5 a 7 noches | <input type="checkbox"/> | 15 a 21 noches..... | <input type="checkbox"/> | 29 noches o más..... | <input type="checkbox"/> |

6. Ahora, pensando en los últimos 12 meses (o sea, desde noviembre del 2001), ¿cuántos viajes ha realizado fuera de México de vacaciones o para visitar familiares?

(Escriba el número) _____ (Si es NINGUNA, escriba CERO) (SI SE DA UN RANGO, PREGUNTE: ¿Diría que sería cerca de _____ ó _____?)

7. Ahora, voy a leer una lista de lugares. Utilizando las respuestas en la TARJETA C, por favor dígame, ¿cuánto le gustaría visitar o volver a visitar cada uno?

(Lea UN lugar a la vez) (Marque UNA casilla por CADA lugar)

	<u>Muchísimo</u>	<u>Mucho</u>	<u>Algo</u>	<u>No mucho</u>	<u>Para nada</u>	<u>No Sabe</u>
América Central	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
América del Sur	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
El Caribe	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Estados Unidos.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Canadá	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Europa	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
El Medio Oriente	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
África.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Asia.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Oceanía (Australia, Nueva Zelanda, Islas del Pacífico Sur)...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

8. Nuevamente, utilizando las respuestas de la TARJETA C, por favor, dígame ¿cuánto le gustaría visitar o volver a visitar cada una de las siguientes ciudades en un viaje a los Estados Unidos?

(Lea UNA ciudad a la vez) (Marque UNA casilla por CADA ciudad)

	<u>Muchísimo</u>	<u>Mucho</u>	<u>Algo</u>	<u>No mucho</u>	<u>Para nada</u>	<u>No Sabe</u>
Nueva York	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Washington, D.C.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Chicago.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Orlando	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Miami.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
San Antonio	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Houston.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
San Diego	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Los Ángeles	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Las Vegas	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
San Francisco	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

9. Nuevamente utilizando las respuestas de la TARJETA C, por favor, dígame ¿cuánto le gustaría visitar o volver a visitar cada una de los siguientes lugares en un viaje a Canadá?

(Lea **UNA** ciudad a la vez) (Marque **UNA** casilla por **CADA** ciudad)

	<u>Muchísimo</u>	<u>Mucho</u>	<u>Algo</u>	<u>No Mucho</u>	<u>Para Nada</u>	<u>No Sabe</u>
Calgary.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Montreal.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ottawa.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Québec City.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Toronto.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Vancouver.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Whistler.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

10. ¿Qué países en América Latina le gustaría visitar o volver a visitar? Por favor, nombre los TRES PRINCIPALES.

(**NO** lea las opciones) (Marque **TRES** casillas **SOLAMENTE**) (Sondee hasta **TRES**)

Argentina..... <input type="checkbox"/>	Ecuador..... <input type="checkbox"/>	Perú..... <input type="checkbox"/>
Bolivia..... <input type="checkbox"/>	El Salvador..... <input type="checkbox"/>	Uruguay..... <input type="checkbox"/>
Brasil..... <input type="checkbox"/>	Guatemala..... <input type="checkbox"/>	Venezuela..... <input type="checkbox"/>
Chile..... <input type="checkbox"/>	Honduras..... <input type="checkbox"/>	Otro..... <input type="checkbox"/>
Colombia..... <input type="checkbox"/>	Nicaragua..... <input type="checkbox"/>	No Sabe..... <input type="checkbox"/>
Costa Rica..... <input type="checkbox"/>	Panamá..... <input type="checkbox"/>	
Cuba..... <input type="checkbox"/>	Paraguay..... <input type="checkbox"/>	

11. (UTILICE TARJETA C) Ahora, específicamente, por favor, dígame ¿cuánto le gustaría visitar o volver a visitar Costa Rica?

(Marque **UNA** casilla)

Muchísimo..... Mucho..... Algo..... No Mucho..... Para nada..... [No Sabe.....

12. ¿Qué países en Europa le gustaría visitar o volver a visitar? Por favor, nombre los TRES PRINCIPALES.

(**NO** lea las opciones) (Marque **TRES** casillas **SOLAMENTE**) (Sondee hasta **TRES**)

Alemania..... <input type="checkbox"/>	Francia..... <input type="checkbox"/>	Mónaco..... <input type="checkbox"/>
Austria..... <input type="checkbox"/>	Gales..... <input type="checkbox"/>	Noruega..... <input type="checkbox"/>
Bélgica..... <input type="checkbox"/>	Grecia..... <input type="checkbox"/>	Otro..... <input type="checkbox"/>
Bulgaria..... <input type="checkbox"/>	Holanda..... <input type="checkbox"/>	Polonia..... <input type="checkbox"/>
Croacia..... <input type="checkbox"/>	Hungría..... <input type="checkbox"/>	Portugal..... <input type="checkbox"/>
Chipre..... <input type="checkbox"/>	Inglaterra..... <input type="checkbox"/>	Republica Checa..... <input type="checkbox"/>
Dinamarca..... <input type="checkbox"/>	Irlanda (Republica de)..... <input type="checkbox"/>	Rumania..... <input type="checkbox"/>
Escocia..... <input type="checkbox"/>	Irlanda del Norte..... <input type="checkbox"/>	Rusia..... <input type="checkbox"/>
Eslovenia..... <input type="checkbox"/>	Islandia..... <input type="checkbox"/>	Suecia..... <input type="checkbox"/>
España..... <input type="checkbox"/>	Italia..... <input type="checkbox"/>	Suiza..... <input type="checkbox"/>
Estonia..... <input type="checkbox"/>	Luxemburgo..... <input type="checkbox"/>	Turquía..... <input type="checkbox"/>
Finlandia..... <input type="checkbox"/>	Malta..... <input type="checkbox"/>	No Sabe..... <input type="checkbox"/>

13. Ahora, utilizando la TARJETA A nuevamente, por favor dígame ¿qué países es probable que usted visite en vacaciones o para visitar a familiares en los próximos dos años?

(**NO** lea las opciones) (Marque **TODAS** las que correspondan)

América Central..... <input type="checkbox"/>	Canadá..... <input type="checkbox"/>	Asia..... <input type="checkbox"/>
América del Sur..... <input type="checkbox"/>	Europa..... <input type="checkbox"/>	Oceanía (Australia, Nueva Zelanda, Islas del Pacífico Sur)..... <input type="checkbox"/>
El Caribe..... <input type="checkbox"/>	El Medio Oriente..... <input type="checkbox"/>	Otro..... <input type="checkbox"/>
Estados Unidos..... <input type="checkbox"/>	África..... <input type="checkbox"/>	

14. Nuevamente utilizando la TARJETA A, por favor dígame, ¿qué lugares ha visitado alguna vez por cualquier motivo?

(**NO** lea las opciones) (Marque **TODAS** las que correspondan) (Sondee)

América Central..... <input type="checkbox"/>	Canadá..... <input type="checkbox"/>	Asia..... <input type="checkbox"/>
América del Sur..... <input type="checkbox"/>	Europa..... <input type="checkbox"/>	Oceanía (Australia, Nueva Zelanda, Islas del Pacífico Sur)..... <input type="checkbox"/>
El Caribe..... <input type="checkbox"/>	El Medio Oriente..... <input type="checkbox"/>	Otro..... <input type="checkbox"/>
Estados Unidos..... <input type="checkbox"/>	África..... <input type="checkbox"/>	

15. **PREGUNTE SÓLO SI SE MARCÓ ESTADOS UNIDOS EN LA PREGUNTA 14.** ¿Alguna vez ha visitado San Diego?

Sí..... No

16. ¿Alguna vez ha tomado un crucero de tres o más noches de duración?

Sí No

17. ¿Qué tan probable es que tome un crucero en los próximos dos años? ¿Diría que es muy probable, algo probable, o nada probable?

(Marque UNA casilla)

Muy probable... Algo probable..... Nada probable

18. PARTICULAR.

19. PARTICULAR.

20. PARTICULAR.

21. PARTICULAR.

II. MOTIVACIONES, ACTITUDES, Y PREFERENCIAS

1. (UTILICE TARJETA F) ¿Que tan probable es que usted haga uno de los siguientes tipos de viaje fuera de México?

(Lea CADA tipo de viaje UNO por uno) (Marque UNA casilla para CADA tipo de viaje) (PUNTO DE PARTIDA ROTADO)

	<u>Sumamente Probable</u>	<u>Algo Probable</u>	<u>No es Probable</u>	<u>No Sabe</u>
Un viaje donde se visitan los principales puntos de interes de un destino turístico	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Un viaje con un fuerte enfoque educativo o cultural ...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Un viaje orientado hacia la ecología y la naturaleza...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Un viaje planeado alrededor de casinos o juegos de azar	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Un viaje dedicado a una actividad o deporte en particular como: esquí, recorridos fluviales en balsa, caminatas campestres, andar en bicicleta, etc.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Una vacación de playa	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

2. (UTILICE TARJETA F) ¿Qué tan probable es que usted viaje a Estados Unidos por las razones siguientes?

(Lea UNA a una las razones) (Marque UNA casilla para CADA razón)

	<u>Sumamente Probable</u>	<u>Algo Probable</u>	<u>No es Probable</u>	<u>No Sabe</u>
Visitar parques de diversiones o parques temáticos...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ir a casinos y espectáculos	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ir de compras.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Visitar parques nacionales	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Conocer lugares relacionados con la industria del cine	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

3. **(UTILICE TARJETA F)** ¿Qué tan probable es que usted realice las siguientes actividades durante un viaje fuera de México?

(Lea **UNA** actividad a la vez) (Marque **UNA** casilla por **CADA** actividad)

	Sumamente Probable	Algo Probable	No es Probable	No Sabe
Visitar lugares de interés histórico	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Visitar museos o galerías de arte.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ir a la opera o ballet.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Probar la cocina local	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Deambular por las calles e imbuirse en el ambiente de la localidad	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Hacer un recorrido por cavas de vino	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Visitar parques nacionales y territorios vírgenes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ir a parques de diversiones	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Asistir a un evento deportivo	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ir a clubes nocturnos, bailar, etc.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ir a un casino, apostar	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Comer en un restaurante famoso.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pasar unos días en la playa	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ir de compras.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

4. Ahora, pensando en actividades al aire libre, por favor dígame, ¿qué tan probable es que usted realice cada una de las siguientes actividades?

(Lea **UNA** actividad a la vez) (Marque **UNA** casilla por **CADA** actividad)

(Si es necesario, recuerde al participante que utilice las respuestas de la TARJETA F)

	Sumamente Probable	Algo Probable	No es Probable	No Sabe
Caminatas campestres.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Bicicleta	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Nado	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Golf	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pesca.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Tenis.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Esquí en nieve.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Canotaje o kayak.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Buceo.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

5. En los últimos 12 meses, ¿ha viajado fuera de México principalmente para ir de compras?

Sí No

6. Y, en los últimos 12 meses, ¿ha viajado fuera de México principalmente para esquiar?

Sí No

7. **(UTILICE TARJETA G)** ¿Generalmente, de qué manera prefiere viajar cuando hace una viaje fuera de México?

(NO lea las opciones) (Marque UNA casilla)

- En un grupo de excursión organizada con un guía.....
- Independientemente, con un paquete de vacaciones.....
- Independientemente, con un itinerario personalizado, con casi todo, hoteles, transporte local, y excursiones, organizado antes de salir de casa.....
- Independientemente, sin organizar estadía en hoteles, transporte local, y excursiones antes de salir de casa.....

8. Ahora, voy a leer varios enunciados. Utilizando las respuestas de la TARJETA H, por favor dígame cuán de acuerdo o desacuerdo está con cada uno de los siguientes enunciados.

(Lea **UN** enunciado a la vez) (Marque **UNA** casilla por **CADA** enunciado)

	<u>Totalmente de Acuerdo</u>	<u>Algo de Acuerdo</u>	<u>Algo en Desacuerdo</u>	<u>Totalmente en Desacuerdo</u>	<u>No Sabe</u>
Considero los viajes al extranjero como una inversión en la educación de mis hijos	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Los viajes al extranjero son comunes entre mis amigos	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cuando salgo de vacaciones, disfruto con mi familia lo mejor que puedo pagar	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
El bienestar y la comodidad son una prioridad para mí cuando viajo fuera de México	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Prefiero que otros organicen y se ocupen de los detalles del viaje	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Prefiero regresar a lugares que ya conozco a experimentar con un lugar nuevo.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Me siento algo incómodo en lugares donde no se habla español	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Para mí un viaje al extranjero es mas un evento que una costumbre.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Yo suelo no leer mucho acerca de los países que voy a visitar.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Puedo viajar al extranjero en cualquier época del año.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
De arrendar un auto, gastaría unos dólares extra en arrendar de una de las compañías grandes como Hertz o Avis ...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Es más barato viajar fuera de Mexico	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Es más seguro viajar fuera de Mexico	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cuando se viaja a <u>Canadá</u> , es más barato comprar un paquete de vacaciones que comprar pasajes aéreos, terrestres, y hoteles por mi cuenta	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

8a. (UTILICE TARJETA F) ¿Que tanto probable es que los trámites necesarios para obtener la visa americana hagan que usted decida viajar a otros lugares?

(Marque **UNA** casilla)

Sumamente Probable Algo Probable..... No es Probable [No Sabe.....

8b. (UTILICE TARJETA F) Y, ¿que tanto probable es que los procedimientos a la entrada en Estados Unidos hagan que usted decida viajar a otros lugares?

(Marque **UNA** casilla)

Sumamente Probable Algo Probable..... No es Probable [No Sabe.....

9. Cuando viaja fuera de México, ¿en que se le iría a usted el dinero con mas facilidad?

(Lea **UN** aspecto a la vez) (Marque **UNA** casilla por **CADA** aspecto)

	<u>Sí</u>	<u>No</u>
Alojamiento.....	<input type="checkbox"/>	<input type="checkbox"/>
Comidas.....	<input type="checkbox"/>	<input type="checkbox"/>
Compras	<input type="checkbox"/>	<input type="checkbox"/>
Boletos de entrada a actividades culturales o de entretenimiento.....	<input type="checkbox"/>	<input type="checkbox"/>
Tours o excursiones	<input type="checkbox"/>	<input type="checkbox"/>

10. A causa de los eventos del 11 de septiembre de 2001, y la constante amenaza de terrorismo, ¿ha realizado alguno de los siguientes?

(Lea **UNA** enunciado a la vez) (Marque **UNA** casilla por **CADA** enunciado)

	Sí	No
Realizado menos viajes fuera de México.....	<input type="checkbox"/>	<input type="checkbox"/>
Viajado dentro de México en vez de al extranjero	<input type="checkbox"/>	<input type="checkbox"/>
Cancelado un viaje planificado.....	<input type="checkbox"/>	<input type="checkbox"/>
Viajado por carretera en vez de en avión.....	<input type="checkbox"/>	<input type="checkbox"/>

11. Si visitara Canadá, ¿cuál de las siguientes actividades disfrutaría?

(Lea **UNA** actividad a la vez) (Marque **UNA** casilla por **CADA** actividad)

	Sí	No
Un deporte de invierno como esquiar o pasear en trineo tirado por perros.....	<input type="checkbox"/>	<input type="checkbox"/>
Asistir a un evento/ festival cultural.....	<input type="checkbox"/>	<input type="checkbox"/>
Relajarse en un café al aire libre.....	<input type="checkbox"/>	<input type="checkbox"/>
Ir de compras.....	<input type="checkbox"/>	<input type="checkbox"/>
Atractivos tradicionales (museos, galerías de arte, música, danza).....	<input type="checkbox"/>	<input type="checkbox"/>
Ver ballenas.....	<input type="checkbox"/>	<input type="checkbox"/>
Canotaje o Kayak.....	<input type="checkbox"/>	<input type="checkbox"/>
Caminatas campestres.....	<input type="checkbox"/>	<input type="checkbox"/>
Ir a un spa.....	<input type="checkbox"/>	<input type="checkbox"/>
Convivir con la cultura aborigen.....	<input type="checkbox"/>	<input type="checkbox"/>
Esquí de nieve (downhill).....	<input type="checkbox"/>	<input type="checkbox"/>
Esquí de campo travesía (crosscountry).....	<input type="checkbox"/>	<input type="checkbox"/>

12. (UTILICE TARJETA H) Por favor dígame cuán de acuerdo o desacuerdo está con los siguientes enunciados sobre Canadá.

(Lea **UNA** enunciado a la vez) (Marque **UNA** casilla por **CADA** enunciado)

	Totalmente de Acuerdo	Algo de Acuerdo	Algo en Desacuerdo	Totalmente en Desacuerdo	No Sabe
Canadá es un país seguro para viajar.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Canadá es un buen destino para toda la familia.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Canadá tiene ciudades culturalmente sofisticadas e interesantes.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Canadá tiene paisajes espectaculares.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Yo visitaría Canadá en cualquier época del año.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Canadá ofrece esquí de alta calidad.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
El costo del pasaje aéreo a Canadá me frena.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
La influencia francesa es una de las razones claves para visitar Canadá.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
En general, Canadá ofrece buen valor por el dinero.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sé muy poco respecto a viajar en Canadá.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

13. (UTILICE TARJETA I) ¿Cómo clasificaría a Canadá en cada una de las siguientes categorías?

(Lea UN enunciado a la vez) (Marque UNA casilla por CADA enunciado)

	<u>Excelente</u>	<u>Bueno</u>	<u>Regular</u>	<u>Deficiente</u>	<u>No tengo Idea</u>
Compras.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Hoteles	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Comida/ restaurantes.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Variedad de cosas para hacer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Atractivos históricos	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Vida nocturna, diversión	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Deportes y actividades al aire libre	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Calidad del servicio.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Requisitos de entrada al país	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Calidez hacia los mexicanos.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cómodo servicio aéreo desde México	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

III. PLANIFICACIÓN DE VIAJES E INFORMACIÓN

Ahora, me gustaría preguntarle respecto a cómo planifica sus viajes fuera de México.

1. Utilizando la TARJETA F, ¿si quisiera saber más sobre un destino como un lugar para visitar, qué tan probable es que usted haga uno de los siguientes?

(Lea UN enunciado a la vez) (Marque UNA casilla por CADA enunciado)

	<u>Sumamente Probable</u>	<u>Algo Probable</u>	<u>No es Probable</u>	<u>No Sabe</u>
Preguntar a un agente de viajes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Hablar con personas que han estado allí.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Investigar en Internet	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Leer revistas de viajes.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Obtener folletos de viajes.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Preguntar en oficinas de turismo o embajadas.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

2. Para sus viajes fuera de México, ¿generalmente, cuándo compra o aparta [INSERTE COMPONENTE]? ¿Antes de salir o después de arribar a su destino?

(Inserte CADA componente en orden) (Repita instrucciones si es necesario) (Marque UNA casilla por CADA componente)

	<u>Antes de Salir</u>	<u>Después de llegar</u>	<u>No Corresponde</u>
Boletos de entrada a parques de diversiones o eventos culturales.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Alojamiento	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Arriendo de auto	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Tours y excursiones.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

3. ¿Cuál de las revistas en la TARJETA J lee usted con regularidad?

(NO lea las opciones) (Marque TODAS las que correspondan) (Sondee)

Bon Vivant	<input type="checkbox"/>	GQ.....	<input type="checkbox"/>	Quo.....	<input type="checkbox"/>
Condé Nast.....	<input type="checkbox"/>	Kena.....	<input type="checkbox"/>	Travel and Leisure.....	<input type="checkbox"/>
Conozca Más.....	<input type="checkbox"/>	La Onda	<input type="checkbox"/>	Tu	<input type="checkbox"/>
Contenido	<input type="checkbox"/>	Men's Health	<input type="checkbox"/>	Vanidades	<input type="checkbox"/>
Cosmopolitan.....	<input type="checkbox"/>	Milenio.....	<input type="checkbox"/>	Vogue.....	<input type="checkbox"/>
Eres	<input type="checkbox"/>	Muy Interesante	<input type="checkbox"/>	Vuelo	<input type="checkbox"/>
Escala	<input type="checkbox"/>	National Geographic en español	<input type="checkbox"/>	Ninguna de éstas	<input type="checkbox"/>
Fama.....	<input type="checkbox"/>	Padres e Hijos.....	<input type="checkbox"/>		
Geomunda.....	<input type="checkbox"/>	Proceso	<input type="checkbox"/>	[No lee revistas.....	<input type="checkbox"/>

4. ¿Cuál de los periódicos en la TARJETA K lee usted con regularidad?

(NO lea las opciones) (Marque TODAS las que correspondan) (Sondee)

- | | | |
|---|---|--|
| El Financiero..... <input type="checkbox"/> | Novedades..... <input type="checkbox"/> | El Público (GDL.)..... <input type="checkbox"/> |
| El Universal..... <input type="checkbox"/> | Reforma..... <input type="checkbox"/> | El Metro (MTY.)..... <input type="checkbox"/> |
| Esto..... <input type="checkbox"/> | Uno más Uno..... <input type="checkbox"/> | El Norte (MTY.)..... <input type="checkbox"/> |
| Excelsior..... <input type="checkbox"/> | El Informador (GDL.)..... <input type="checkbox"/> | El Sol de Monterrey (MTY.)..... <input type="checkbox"/> |
| La Jornada..... <input type="checkbox"/> | El Mural (GDL.)..... <input type="checkbox"/> | Extra (MTY.)..... <input type="checkbox"/> |
| La Prensa..... <input type="checkbox"/> | El Occidental (GDL.)..... <input type="checkbox"/> | Milenio Diario de Monterrey (MTY.) .. <input type="checkbox"/> |
| Milenio..... <input type="checkbox"/> | El Ocho Columnas (GDL.)..... <input type="checkbox"/> | Ninguna de éstos..... <input type="checkbox"/> |

No lee periódicos..... → **(Ir a P. 6)**

5. ¿Lee usted con regularidad la sección de viajes de su periódico local?

Sí..... No.....

6. ¿En su hogar se suscriben a televisión por cable?

Sí..... No.....

7. ¿Alguna vez a comprado algo (viajes o cualquier otra cosa) en Internet?

Sí..... No.....

8. ¿Tiene usted acceso a Internet actualmente?

Sí..... No.....

9. **(UTILICE TARJETA H)** Por favor dígame cuán de acuerdo o desacuerdo está con cada uno de los siguientes enunciados.

(Lea UN enunciado a la vez) (Marque UNA casilla por CADA enunciado)

	Totalmente de Acuerdo	Algo de Acuerdo	Algo en Desacuerdo	Totalmente en Desacuerdo	No Sabe
Yo dudaría en utilizar mi tarjeta de crédito en al Internet.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Internet está bien para recolectar información, pero prefiero comprar a través de un agente de viajes o una aerolínea.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

10. ¿Tiene usted dirección de correo electrónico?

Sí..... → **(Continúe)** No..... → **(Ir a Sección IV, P. 1)**

11. ¿Le gustaría recibir información acerca de ofertas especiales para viajes a través del correo electrónico?

Sí..... No.....

IV. TRANSPORTACIÓN

1. **(UTILICE TARJETA L)** ¿Cuándo elige una aerolínea para viajar fuera de México, qué factor es el más importante para usted?

(NO lea las opciones) (Marque UNA casilla)

- | | |
|---|--|
| Una reputación por excelente servicio..... <input type="checkbox"/> | Crédito por millas en un programa de viajero frecuente..... <input type="checkbox"/> |
| La tarifa más baja..... <input type="checkbox"/> | Los horarios más convenientes..... <input type="checkbox"/> |

2. **(UTILICE TARJETA I)** ¿Cuál es su percepción de **[INSERTE PRIMERA AEROLÍNEA]** para viajes internacionales?

(Marque UNA casilla por CADA aerolínea) (Repita instrucciones si es necesario) (PUNTO DE PARTIDA ALEATORIO)

	<u>Excelente</u>	<u>Buena</u>	<u>Regular</u>	<u>Deficiente</u>	<u>No tengo Idea</u>
Aeroméxico	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Air Canadá	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Air France.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
America West.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
American Airlines	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
British Airways.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Continental Airlines	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Delta Air Lines	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Grupo Taca	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Iberia	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lan Chile	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Mexicana	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Northwest Airlines	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
United Airlines	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

3. **(UTILICE TARJETA M)** ¿En general, cómo cree usted que las aerolíneas mexicanas más importantes se posicionan en comparación a las aerolíneas más importantes extranjeras en cuanto a **[INSERTE CARACTERÍSTICA]**?

(Marque UNA casilla por CADA característica) (Repita instrucciones si es necesario)

	<u>Aerolíneas Mexicanas son Mejores</u>	<u>Casi Igual</u>	<u>Aerolíneas Extranjeras grandes son Mejores</u>	<u>No tengo Idea</u>
Comidas	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Servicio de cabina.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Puntualidad	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Mantenimiento de aviones	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

4. ¿Pertenece a algún programa de viajero frecuente?

Sí No

5. Cuando viaja a los Estados Unidos, ¿por lo general prefiere volar en una aerolínea mexicana o una aerolínea estadounidense?

(Marque UNA casilla)

Una aerolínea mexicana.....

Una aerolínea estadounidense

[Indiferente.....

6. Cuando viaja a otros países, ¿por lo general prefiere volar en una aerolínea mexicana o en una aerolínea del país que va a visitar (por ejemplo, British Airways para ir a Gran Bretaña o Air Canada para ir a Canadá)?

(Marque UNA casilla)

Una aerolínea mexicana.....

Una aerolínea del país que va a visitar

[Indiferente.....

V. SU VIAJE MÁS RECIENTE

Ahora, le voy a preguntar acerca de su viaje MÁS RECIENTE fuera de México cuyo motivo fue principalmente vacaciones o visitar familiares. Por favor, responda sólo en conexión con ese viaje.

1. Nuevamente utilizando la TARJETA A, ¿qué lugares que aparecen en la lista visitó en su viaje MÁS RECIENTE?

(NO lea las opciones) (Marque TODAS las que correspondan) (Sondee)

América Central	Canadá	Asia
América del Sur	Europa	Oceanía (Australia, Nueva Zelanda,
El Caribe	El Medio Oriente	Islas de Pacífico Sur)
Estados Unidos	África	Otro

2. ¿El motivo principal de este viaje fue por vacaciones o visitar a familiares?

Vacación principalmente Visitar familiares principalmente

3. **(UTILICE TARJETA N)** ¿Cuál de estos factores influyeron su elección de destino en este viaje (es decir, su viaje MÁS RECIENTE fuera de México cuyo motivo principal fue vacaciones o visitar a familiares)?

(NO lea las opciones) (Marque TODAS las que correspondan) (Sondee)

Un paquete o tarifa particularmente bueno	Publicidad en televisión.....
Tasa de cambio favorable	Información no solicitada que llegó por correo ...
Una visita anterior	Información obtenida en Internet
Ofrece algo para toda la familia.....	Una película o libro
Recomendación de un agente de viajes.....	Editorial/ artículo en revista o periódico
Hablar con alguien que había estado allí	Podía manejar desde México.....
Tener amigos que viven allí	Podía volar a una ciudad fronteriza y manejar
Tener familiares que viven allí	hasta allí desde México
Publicidad en revistas o periódicos	Ninguna de éstos

4. ¿En que mes comenzó este viaje? **(Marque UNA casilla)**

Enero	Marzo	Mayo	Julio.....	Septiembre .	Noviembre....
Febrero	Abril	Junio	Agosto.....	Octubre.....	Diciembre.....

5. ¿En total, cuántas noches aproximadamente estuvo fuera de casa en su viaje más reciente fuera de México?

(Escriba el número) _____ **(Si es NINGUNA, escriba CERO)** **(SI SE DA UN RANGO,**
PREGUNTE: ¿Diría que sería cerca de _____ ó _____?)

6. ¿Cuántas ciudades visitó durante este viaje?

(Escriba el número) _____ **(Si es NINGUNA, escriba CERO)** **(SI SE DA UN RANGO,**
PREGUNTE: ¿Diría que sería cerca de _____ ó _____?)

7. La siguiente pregunta se relaciona con el número de personas que viajaron con usted. Por favor, NO incluya compañeros de excursión (tour) a menos que usted planificó viajar con ellos antes de organizar el viaje.

(Lea CADA pregunta en orden) (Escriba el número) (Si es NINGUNA, escriba CERO)

Incluyéndolo a usted, ¿cuántos adultos de 18 años o más viajaron con usted? _____

¿Cuántos niños de 12 a 17 años viajaron con usted? _____

¿Cuántos niños menores de 12 años viajaron con usted? _____

8. Utilizando las respuestas de la TARJETA O, por favor dígame ¿quién lo acompañó en este viaje?

(NO lea las opciones) (Marque TODAS las que correspondan)

Nadie	Nieto(s) menor(es) de 18 años.....	Otra(s) pareja(s)
Cónyuge/ compañero(a).....	Hijo(s) de 18 o mayores	Amigo(s)
Hijo(s) menor(es) de 12 años..	Padres	Otro
Hijo(s) de 12 a 17 años	Otro(s) familiar(s).....	

8a. Y quien de los que fueron en este viaje tuvo la mayor influencia en la selección del destino?

(NO lea las opciones) (Marque TODAS las que correspondan)

- Yo Nieto(s) menor(es) de 18 años..... Otra(s) pareja(s)
 Cónyuge/ compañero(a)..... Hijo(s) de 18 o mayores Amigo(s)
 Hijo(s) menor(es) de 12 años.. Padres Otro
 Hijo(s) de 12 a 17 años Otro(s) familiar(s).....

9. Pensando nuevamente en su viaje MÁS RECIENTE fuera de México, por favor dígame, utilizando las respuestas de la TARJETA P, ¿cómo se transportó durante la mayoría de este viaje?

(Marque UNA casilla)

- En un crucero
 En una excursión organizada (tour) con un guía
 Paquete vacacional
 Itinerario personalizado con reservaciones por adelantado.....
 Casi todo sin reservaciones por adelantado

10. **(UTILICE TARJETA Q)** ¿Qué tipo de alojamiento utilizó en este viaje?

(NO lea las opciones) (Marque TODAS las que correspondan)

- Hotel de lujo..... Hotel de suites Crucero.....
 Hotel de primera clase..... Condominio de tiempo compartido.. Casa de amigos
 Hotel de media clase Casa familiar para vacaciones Casa de familiares.....
 Hotel económico..... Condominio rentado Otro.....

11. ¿Arrendó un auto en su viaje más reciente?

- Sí No

12. ¿Utilizó a un agente de viajes para este viaje?

- Sí → **(Continúe)** No → **(Ir a P. 14)**

13. ¿De cuál de las maneras que se listan en la TARJETA R utilizó el agente de viajes para este viaje?

(NO lea las opciones) (Marque TODAS las que correspondan)

- Ayuda para seleccionar destino(s)
 Para planificar su itinerario
 Para planificar actividades y elegir atracciones.....
 Para apartar hoteles u otro alojamiento.....
 Para comprar pasajes de avión
 Para comprar un pasaje en un grupo de excursión, paquete vacacional, o crucero

14. ¿Utilizó la Internet para este viaje?

- Sí → **(Continúe)** No → **(Ir a P. 16)**

15. ¿De cuál de las maneras listadas en la TARJETA R utilizó la Internet para este viaje?

(NO lea las opciones) (Marque TODAS las que correspondan)

- Ayuda para seleccionar destino(s)
 Para planificar su itinerario
 Para planificar actividades y elegir atracciones.....
 Para apartar hoteles u otro alojamiento.....
 Para comprar pasajes de avión
 Para comprar un pasaje en un grupo de excursión, paquete vacacional, o crucero

16. **(UTILICE TARJETA S)** Pensando en su viaje más reciente fuera de México cuyo motivo principal fue tomar vacaciones o visitar familiares, ¿cuánto tiempo antes de su partida usted **[INSERTE ENUNCIADO]**?

(Lea UN enunciado a la vez) (Marque UNA casilla por CADA enunciado)

	Menos de 2 <u>Semanas</u>	2 a 4 <u>Semanas</u>	1 a 3 <u>Meses</u>	4 a 6 <u>Meses</u>	7 Meses o <u>Más</u>	No <u>Corresponde</u>
Decidió su destino.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fijó la fecha para el viaje	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Compró los pasajes de avión....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

17. ¿Fue este su primer viaje fuera de México? Sí No

18. **(UTILICE TARJETA T)** En total, ¿aproximadamente cuánto gastó en este viaje, por persona, en dólares americanos? Incluya todo lo relacionado con este viaje.

(NO lea las opciones) (Marque UNA casilla)

Menos de US\$500.....	<input type="checkbox"/>	US\$2,000 to US\$2,999.....	<input type="checkbox"/>	US\$5,000 ó más.....	<input type="checkbox"/>
US\$500 to US\$999	<input type="checkbox"/>	US\$3,000 to US\$3,999.....	<input type="checkbox"/>	[No sabe	<input type="checkbox"/>
US\$1,000 to US\$1,999	<input type="checkbox"/>	US\$4,000 to US\$4,999.....	<input type="checkbox"/>		

VI. VIAJES DE NEGOCIOS

Las preguntas en esta sección se refieren a los VIAJES DE NEGOCIOS que usted personalmente ha hecho fuera de México. Por favor no incluya los viajes cuyo motivo principal fue tomar vacaciones o visitar familiares.

1. En los últimos tres años (o sea, desde noviembre de 1999), ¿cuántas veces ha salido en viajes de negocios fuera de México durante el cuál estuvo fuera por una o más noches?

Ninguna → (Ir a Sección VII, P. 1)
Una o más **(Escriba el número)** _____ → **(Continúe)**

2. ¿A cuántos de estos viajes de negocios le agregó dos noches o más para tomar vacaciones?

(Escriba el número) _____ **(Si es NINGUNO, escriba CERO)** **(SI SE DA UN RANGO, PREGUNTE: ¿Diría que fue más cerca de _____ ó _____?)**

3. ¿Le acompañó su cónyuge u otra persona que no fuera un asociado de negocios en uno o más viajes de negocios fuera de México en los últimos tres años?

Sí No

4. ¿Le acompañó algún hijo menor de 18 años en uno o más viajes de negocios fuera de México en los últimos tres años?

Sí No

5. Utilizando nuevamente la TARJETA A, ¿a dónde viajó por razones de negocio en los últimos tres años?

(NO lea las opciones) (Marque TODAS las que correspondan) (Sondee)

América Central	<input type="checkbox"/>	Canadá	<input type="checkbox"/>	Asia.....	<input type="checkbox"/>
América del Sur	<input type="checkbox"/>	Europa	<input type="checkbox"/>	Oceanía (Australia, Nueva Zelanda,	<input type="checkbox"/>
El Caribe	<input type="checkbox"/>	El Medio Oriente	<input type="checkbox"/>	Islas del Pacífico Sur)	<input type="checkbox"/>
Estados Unidos.....	<input type="checkbox"/>	África.....	<input type="checkbox"/>	Otro.....	<input type="checkbox"/>

6. **PREGUNTE SÓLO SI SE MENCIONÓ CANADÁ EN LA PREGUNTA 5.** ¿Cuántos viajes de negocio ha realizado a Canadá en los últimos tres años?

(Escriba el número) _____ **(SI SE DA UN RANGO, PREGUNTE: ¿Diría que es cerca de _____ ó _____?)**

7. En total, ¿aproximadamente cuántas noches estuvo fuera de casa en su viaje de negocios más reciente fuera de México?

(Escriba el número) _____ (Si es **NINGUNA**, escriba **CERO**) (SI SE DA UN RANGO, PREGUNTE: ¿Diría que fue cerca de _____ ó _____?)

8. En los últimos tres años, ¿viajó fuera de México para asistir a una junta organizada por su empresa (por ejemplo, seminario, junta de ventas, junta de accionistas, etc.)?

Sí No

VII. INFORMACIÓN PERSONAL

Finalmente, me gustaría hacerle unas preguntas personales. Todas las respuestas serán totalmente confidenciales.

1. ¿Es usted casado(a)? Sí No

2. ¿Tiene usted hijos menores de 18 años que vivan en su hogar?

Sí → (Continúe) No → (Ir a P. 4)

3. ¿Cuántos de sus niños tienen [INSERTE GRUPO DE EDAD UTILIZANDO LA TABLA]?

(Marque **UNA** casilla por **CADA** grupo de edad) (Repita instrucciones si es necesario)

	Ninguno	Uno	Dos	Tres	Cuatro	Cinco	Seis o Más
Menos de 6 años de edad.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Entre 6 y 12 años de edad.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Entre 13 y 17 años de edad.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

4. ¿Qué idiomas (además de español) habla usted? (**NO** lea las opciones) (Marque **TODAS** las que correspondan)

Ningún otro idioma Italiano.....
 Inglés Alemán
 Francés..... Otro

5. ¿Qué tarjetas de crédito, si corresponde, tiene usted personalmente? (**NO** lea las opciones) (Marque **TODAS** las que correspondan) (Sondee)

American Express MasterCard..... Otra
 Diners Club Visa Ninguna
 Discover.....

6. En los últimos tres años, ¿ha viajado fuera de México para asistir a una junta o reunión de una asociación (es decir, asociación de industria, sociedad profesional, o educacional) ya sea como delegado o el cónyuge/ invitado(a) de un delegado?

Sí No

7. En los últimos tres años, ¿ha viajado fuera de México por un viaje de incentivo/ recompensa (es decir, viajes pagados por su empresa, o la empresa de su cónyuge como incentivo de ventas u otras recompensas)?

Sí No

8. En los últimos tres años, ¿ha viajado a los Estados Unidos para recibir tratamiento médico o como el acompañante de alguien que iba a recibir tratamiento médico?

Sí No

9. ¿Actualmente cuenta usted con un pasaporte vigente de algún país europeo?

Sí No

10. ¿Actualmente, tiene usted una visa para visitar los Estados Unidos?

Sí

No

11. La última pregunta, ¿en los últimos 12 meses (es decir, desde Noviembre del 2001), cuántos viajes ha hecho DENTRO de México cuyo motivo principal fue tomar vacaciones y durante los cuales estuvo fuera de casa por dos o más noches?

(Escriba el número) _____ (Si es NINGUNO, escriba CERO) (SI SE DA UN RANGO,
PREGUNTE: ¿Diría usted que sería cerca de _____ ó _____?)



APPENDIX D

ROSTER OF INTERVIEWEES

Abiega Operadora de Viajes

Ms. Rosario de Abiega, General
Director
Mexico, D.F.

Acuatur Operador Mayorista

Ms. Gloria Febres, Operations
Manager
Mexico, D.F.

American Express Co.

Mr. Fernando Rocha, Senior Analyst,
Supplier Relations Group
Mexico, D.F.

Astromundo Operadores

Mr. Mario Martinez, Sales Director
Mexico, D.F.

Bonytours

Mr. Sergio Garza, Travel Agent
Monterrey, Nuevo León

Bueno Tours

Mr. Gilberto Martinez, Travel Agent
Monterrey, Nuevo León

Corporate Travel Services

Ms. Isabel Parada, Wholesale Manager
Mexico, D.F.

Destinos Internacionales

Mr. Jorge Aznar, Group Executive
Mexico, D.F.

Diana Lee's Ski the Classics

Ms. Naya Galeano, Sales Agent
Mexico, D.F.

Dimatra Representaciones

Ms. Arturo Romero, General Manager
Mexico, D.F.

Econovisa

Mr. Jaime Levy, General Manager
Mexico, D.F.

Excel Tours

Mr. Agustin Gonzalez, Director
General
Monterrey, Nuevo León

Intercamp Viajes

Ms. Fay Wiszlicki, General Director
Mexico, D.F.

Julia Tours

Mr. Miguel Galicia, Sales Manager
Mexico, D.F.

Mex-Atlantica Mayorista

Mr. Carlos Alberto Vazquez, Sales
Director
Mexico, D.F.

Mex-Inca Viajes

Mr. Irving Mayett Muciño, Marketing
Director
Mexico, D.F.

Mexicana Airlines

Ms. Adriana Ramos, International
Product Operation Manager
Mexico, D.F.

Navimex

Mr. Jaime Sanchez, Sales Executive
Monterrey, Nuevo León

Ofertas Turísticas

Mr. Miguel Angel Perez, General
Director
Mexico, D.F.

Onvisa

Mr. Fernando Esquivel, Operations
Department—Canada Operator
Mexico, D.F.

Polmex Tours

Mr. Cesar Fernandez, Operations
Manager
Mexico, D.F.

Profetur

Ms. Liliana Samano, Director
Mexico, D.F.

Receptur

Ms. Maria Larrondo, General Manager
Mexico, D.F.

Riotur Operador Mayorista

Ms. Connie Sarrave, Sales Manager
Mexico, D.F.

Tames Mayorista de Viajes

Mr. Guillermo Valdez, Operations
Manager
Mexico, D.F.

Tecama Viajes Cursos y Camps

Ms. Beatriz Garcia, Sales and
Operations Manager
Naucalpan, Estado de México

Turismo Latino

Ms. Mireya Cabrera, General Director
Mexico, D.F.

Valero Viajes

Mr. Raymundo Valero, Director
Mexico, D.F.

Viajes Acav

Ms. Beatriz de Madarillaga, Travel
Agent
Mexico, D.F.

Viajes Capistrano

Ms. Alexandra Schultz, Travel Agent
Guadalajara, Jalisco

Viajes Excelsior

Ms. Betty Guadarrama, Travel Agent
Mexico, D.F.

Viajes Holam

Mr. Moises Braverman, General
Manager
Mexico, D.F.

Viajes Marsans de México

Ms. Rosa María Hernández, Marketing
Director
Mexico, D.F.

Viajes Mex-Jal de Occidente

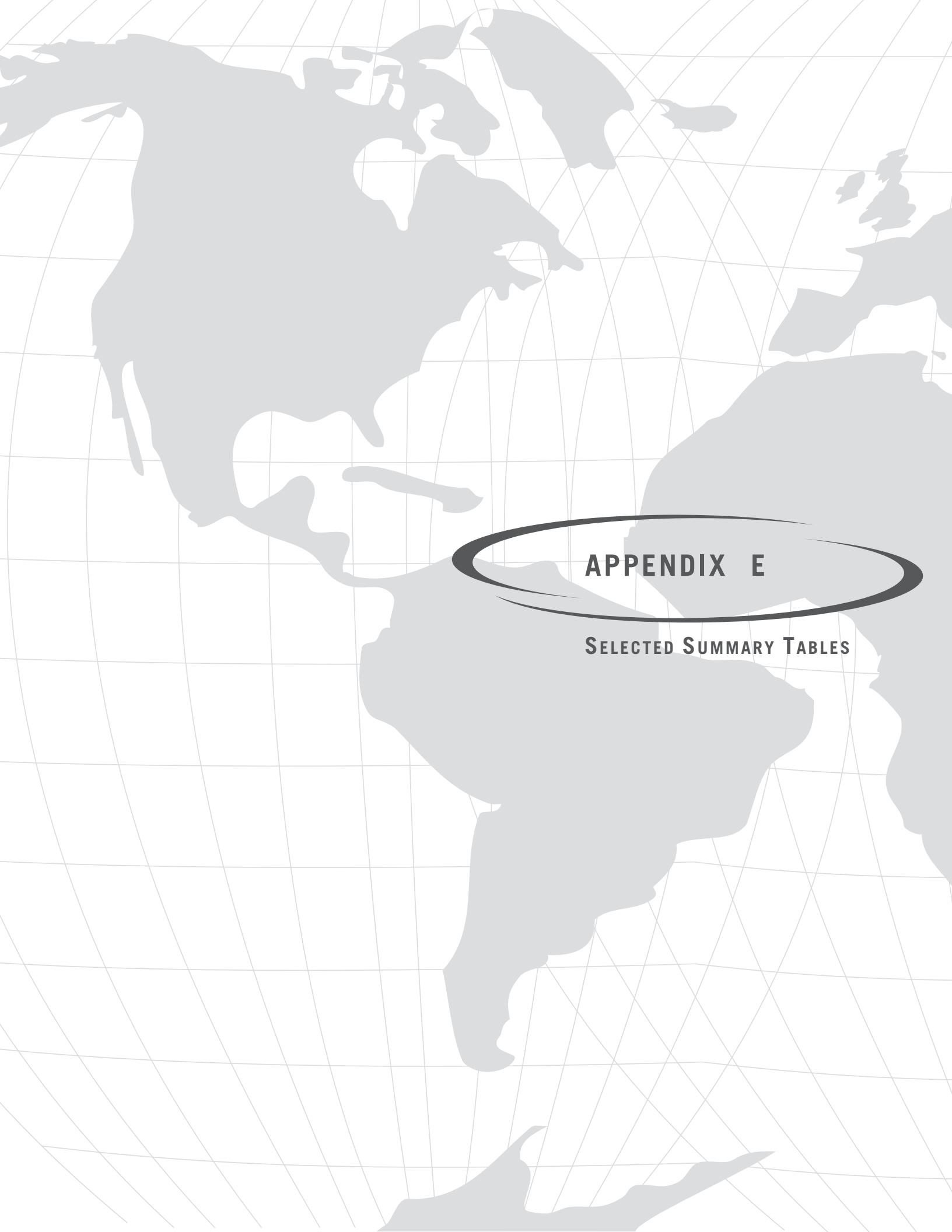
Ms. Beatriz Garcia de Ascencio, Travel
Agent
Guadalajara, Jalisco

Viajes Miramontes

Ms. Esther Sandoval, General Director
Mexico, D.F.

Viajes Tresmares

Mr. Adolfo Pardo, General Director
Mexico, D.F.



APPENDIX E

SELECTED SUMMARY TABLES

EXHIBIT E-1. PROFILE OF TARGET TRAVELERS FOR CANADA EXTREMELY INTERESTED IN VISITING OR REVISITING SELECTED CITIES

	Canada	Toronto	Ottawa	Montreal	Quebec City	Vancouver	Whistler
Age							
18 to 24	18.6%	20.9%	19.5%	21.2%	19.5%	20.3%	16.7%
25 to 34	20.4	21.3	21.5	23.3	20.5	21.2	29.0
35 to 44	18.6	22.3	23.6	21.9	20.3	19.6	22.4
45 to 54	21.4	18.3	18.5	18.3	21.1	21.6	17.2
55 to 64	11.1	8.2	7.6	7.9	10.0	9.3	5.8
65 or older	9.9	9.0	9.3	7.4	8.6	8.0	9.0
Socio-economic class							
A/B	54.7	55.5	52.0	51.8	54.6	52.2	47.1
C+	45.3	44.5	48.0	48.2	45.4	47.8	52.9
Marital status							
Married	56.6	54.3	56.6	52.9	53.6	52.9	61.1
Not married	43.4	45.7	43.4	47.1	46.4	47.1	38.9
Have children under 18 living at home	35.6	36.5	38.1	36.3	35.8	33.7	42.8
Gender							
Male	53.0	48.8	50.2	49.4	47.6	50.4	47.8
Female	47.0	51.2	49.8	50.6	52.4	49.6	52.2
City							
Mexico	49.9	48.3	48.7	51.0	51.9	49.2	43.9
Monterrey	41.4	43.4	44.7	41.7	40.7	41.4	52.3
Guadalajara	8.7	8.3	6.6	7.3	7.4	9.4	3.8
Foreign languages spoken							
English	75.3	77.5	79.6	77.8	81.1	75.5	78.2
French	11.6	13.4	12.9	13.6	15.9	14.5	13.7
(Number of respondents)	(790)	(311)	(270)	(305)	(284)	(313)	(137)

EXHIBIT E-2. TRAVEL ARRANGEMENT PREFERENCES OF TARGET TRAVELERS FOR CANADA EXTREMELY INTERESTED IN VISITING SELECTED CITIES

	Canada	Toronto	Ottawa	Montreal	Quebec City	Vancouver	Whistler
Impromptu	21.4%	20.5%	20.1%	20.3%	21.2%	20.3%	24.5%
Custom	42.8	45.4	44.6	43.0	44.0	43.7	44.8
Package	25.7	24.4	25.4	26.3	22.8	26.7	20.7
Escorted group tour	10.1	9.6	9.9	10.4	12.0	9.4	10.0
(Number of respondents)	(790)	(311)	(270)	(305)	(284)	(313)	(137)

EXHIBIT E-3. TRAVELERS HIGHLY LIKELY TO TAKE VARIOUS KINDS OF INTERNATIONAL TRIPS
(TARGET TRAVELERS FOR CANADA EXTREMELY INTERESTED IN VISITING SELECTED CITIES)

	Canada	Toronto	Ottawa	Montreal	Quebec City	Vancouver	Whistler
Beach vacation	71.9%	73.0%	76.4%	75.7%	75.8%	72.7%	74.7%
General sightseeing	58.2	61.1	66.3	65.1	65.0	60.0	64.8
Education and culture	41.5	43.9	48.6	46.3	50.6	42.9	53.6
Nature and ecology	29.7	31.8	32.6	34.5	35.5	29.1	37.5
Casinos and gambling	25.3	27.9	29.1	26.7	27.9	29.3	29.8
Outdoor activity	25.2	31.3	28.1	29.5	29.4	30.7	34.9
(Number of respondents)	(790)	(311)	(270)	(305)	(284)	(313)	(137)

EXHIBIT E-4. SELECTED ACTIVITIES TRAVELERS WOULD ENJOY ON A TRIP TO CANADA
(TARGET TRAVELERS FOR CANADA EXTREMELY INTERESTED IN VISITING SELECTED CITIES)

	Canada	Toronto	Ottawa	Montreal	Quebec City	Vancouver	Whistler
Relax at a sidewalk café	84.4%	85.3%	83.8%	84.7%	86.4%	84.4%	87.0%
Shopping	81.1	81.3	80.1	82.1	80.8	81.1	84.5
Try traditional activities	78.1	75.2	79.0	78.2	80.3	78.4	82.0
Cultural event or festival	76.7	77.7	76.8	75.6	81.3	77.9	83.7
Whale watching	69.1	69.6	68.8	71.4	70.7	70.9	73.8
Hiking	61.5	64.1	63.9	63.5	64.1	60.8	68.2
A winter activity	58.0	62.0	58.7	64.8	59.4	63.4	62.4
Experience aboriginal culture	48.9	51.5	52.7	55.1	56.3	52.4	60.1
Visit a spa	46.2	50.4	43.8	48.6	50.2	52.2	48.9
Downhill skiing	44.2	46.7	44.8	50.3	46.7	48.0	47.9
Kayaking/canoeing	32.7	30.9	33.7	36.7	33.9	33.0	40.4
Cross country skiing	31.0	33.1	33.5	35.3	32.9	33.6	34.6
(Number of respondents)	(790)	(311)	(270)	(305)	(284)	(313)	(137)

EXHIBIT E-5. PERCEPTIONS OF CANADA—AGREE STRONGLY
(TARGET TRAVELERS FOR CANADA EXTREMELY INTERESTED IN VISITING SELECTED CITIES)

	Canada	Toronto	Ottawa	Montreal	Quebec City	Vancouver	Whistler
Canada has spectacular scenery	78.4%	84.4%	84.2%	85.9%	86.1%	84.4%	79.9%
Canada is a good destination for the whole family	69.8	75.6	76.5	77.3	80.1	77.3	76.9
Canada is a safe travel destination	67.7	74.3	73.6	75.5	78.8	74.1	74.7
Canada has sophisticated and culturally interesting cities	64.9	69.5	70.1	72.3	77.2	70.8	71.0
Canada has high quality skiing	49.2	55.8	57.9	56.5	54.4	58.0	58.2
Overall, Canada offers good value for the money	45.9	53.0	49.2	51.3	56.1	50.8	54.8
I would visit Canada at any time of year	42.8	49.5	50.9	52.7	54.7	49.7	54.3
I know very little about traveling in Canada	22.3	22.2	20.9	21.0	21.4	23.1	24.5
The French influence is a key reason for visiting	21.4	23.8	23.3	24.9	29.7	25.8	31.8
The cost of the airfare puts me off	15.8	16.2	15.3	15.7	16.5	18.4	16.8
(Number of respondents)	(790)	(311)	(270)	(305)	(284)	(313)	(137)

EXHIBIT E-6. ASPECTS OF AN INTERNATIONAL TRIP ON WHICH TRAVELERS' ARE LIKELY TO SPLURGE
(TARGET TRAVELERS FOR CANADA EXTREMELY INTERESTED IN VISITING SELECTED CITIES)

	Canada	Toronto	Ottawa	Montreal	Quebec City	Vancouver	Whistler
Shopping	74.7%	75.8%	75.9%	75.9%	74.4%	76.2%	78.3%
Dining	64.7	61.9	64.0	60.5	61.3	61.0	62.9
Lodging	63.0	62.9	61.5	60.0	62.5	60.0	65.6
Cultural activities	49.6	52.6	47.4	51.7	51.0	53.7	56.6
Tours and excursions	43.0	44.8	45.2	42.8	47.3	43.4	48.6
(Number of respondents)	(790)	(311)	(270)	(305)	(284)	(313)	(137)

EXHIBIT E-7. SOURCES HIGHLY LIKELY TO CONSULT FOR DESTINATION INFORMATION
(TARGET TRAVELERS FOR CANADA EXTREMELY INTERESTED IN VISITING SELECTED CITIES)

	Canada	Toronto	Ottawa	Montreal	Quebec City	Vancouver	Whistler
Talk with people who have been there	65.9%	63.0%	64.6%	65.5%	66.6%	64.2%	68.4%
Ask a travel agent	57.1	51.0	55.5	56.8	54.5	54.2	56.2
Search the Internet	50.6	52.7	52.1	53.7	52.0	53.4	56.1
Obtain travel brochures	49.9	50.8	56.8	52.7	55.4	53.9	61.4
Look in travel magazines	44.3	44.7	50.8	44.8	49.2	47.6	54.6
Contact tourist offices	34.5	35.6	36.8	36.6	38.2	37.9	45.0
(Number of respondents)	(790)	(311)	(270)	(305)	(284)	(313)	(137)

EXHIBIT E-8. TRAVELERS' INTERNET USE
(TARGET TRAVELERS FOR CANADA EXTREMELY INTERESTED IN VISITING SELECTED CITIES)

	Canada	Toronto	Ottawa	Montreal	Quebec City	Vancouver	Whistler
Currently have Internet access	76.8%	76.3%	76.7%	77.4%	77.0%	78.1%	73.6%
Have an e-mail address	63.0	63.6	62.5	65.3	65.6	64.1	62.0
Ever purchased travel or anything else on the Internet	20.8	18.8	16.8	19.5	21.6	20.4	17.5
(Number of respondents)	(790)	(311)	(270)	(305)	(284)	(313)	(137)

EXHIBIT E-9. TRAVELERS' USE OF SELECTED MEDIA
(TARGET TRAVELERS FOR CANADA EXTREMELY INTERESTED IN VISITING SELECTED CITIES)

	Canada	Toronto	Ottawa	Montreal	Quebec City	Vancouver	Whistler
Regularly read newspapers	92.4%	92.8%	93.8%	94.0%	93.0%	92.6%	92.6%
Regularly read magazines	90.1	91.3	94.1	91.6	93.4	92.2	94.1
Household subscribes to cable television	82.8	80.8	84.0	81.5	81.3	81.2	79.7
Regularly read travel section of local newspaper	43.3	48.8	45.8	44.7	47.6	47.9	50.4
(Number of respondents)	(790)	(311)	(270)	(305)	(284)	(313)	(137)

EXHIBIT E-10. PLANNING AND BOOKING LEAD TIME FOR MOST RECENT INTERNATIONAL TRIP
(TARGET TRAVELERS FOR CANADA EXTREMELY INTERESTED IN VISITING SELECTED CITIES)

	Canada	Toronto	Ottawa	Montreal	Quebec City	Vancouver	Whistler
Decided on destination							
Less than 2 weeks	28.1%	30.5%	28.1%	28.6%	31.1%	31.5%	31.9%
2 to 4 weeks	21.5	20.5	22.3	19.3	18.7	20.0	21.5
1 to 3 months	35.3	33.1	32.5	34.9	32.5	32.8	29.9
4 to 6 months	10.4	9.5	11.7	11.0	10.2	10.0	9.2
7 months or more	4.7	6.4	5.5	6.2	7.5	5.6	7.5
Set the date for the trip							
Less than 2 weeks	31.4	34.3	34.2	34.0	35.1	36.7	39.6
2 to 4 weeks	24.6	24.2	22.5	22.5	23.3	21.4	24.5
1 to 3 months	34.6	31.6	32.8	33.6	32.9	32.3	29.3
4 to 6 months	6.4	5.7	7.2	6.2	4.3	6.0	2.7
7 months or more	3.0	4.2	3.4	3.8	4.3	3.6	3.9
Purchased airline ticket							
Less than 2 weeks	41.3	41.0	42.2	42.9	43.8	43.7	47.9
2 to 4 weeks	32.2	34.2	35.7	33.4	31.4	33.8	32.4
1 to 3 months	22.3	19.0	18.3	18.4	20.1	17.7	16.8
4 to 6 months	1.9	2.4	1.5	1.3	2.0	1.9	0.0
7 months or more	2.2	3.5	2.3	4.0	2.7	2.9	2.9
(Number of respondents)	(583-643)	(239-260)	(201-218)	(238-257)	(215-231)	(244-265)	(102-111)

EXHIBIT E-11. WHEN TRAVELERS TYPICALLY PURCHASE OR ARRANGE COMPONENTS OF THEIR TRIPS
(TARGET TRAVELERS FOR CANADA EXTREMELY INTERESTED IN VISITING SELECTED CITIES)

	Canada	Toronto	Ottawa	Montreal	Quebec City	Vancouver	Whistler
Sightseeing tours							
Before departure	65.7%	63.0%	62.7%	62.5%	62.9%	64.3%	59.5%
After arrival	34.3	37.0	37.3	37.5	37.1	35.7	40.5
Rental car							
Before departure	63.5	60.7	58.6	61.9	58.7	61.3	56.6
After arrival	36.5	39.3	41.4	38.1	41.3	38.7	43.4
Admission to events							
Before departure	56.0	55.9	58.1	57.9	57.1	57.3	53.7
After arrival	44.0	44.1	41.9	42.1	42.9	42.7	46.3
(Number of respondents)	(705-777)	(271-306)	(240-268)	(270-301)	(250-281)	(278-281)	(278-301)