



# Results of Tourism Activity

## Mexico, January 2017

Undersecretariat of Planning and Tourism Policy

Available in <http://www.datatur.sectur.gob.mx/SitePages/versionesRAT.aspx>

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## INDEX

- International Visitors to Mexico
  - 1. Arrival of international visitors.....5
  - 1.1. Arrival of international tourists.....5
  - 1.1.2. International travel receipts.....6
  - 1.1.3. International travelers balance.....7
  - 1.1.4. Average Expenditure of Long-Stay tourists, Air transport..... 8
  
- Air Transportation by residence
  - 2. International visitors to Mexico arriving by Air..... 10
  - 2.2. American passengers arriving by Air..... 11
  - 2.2.3 Canadian passengers arriving by Air.....11
  - 2.2.4. Main airports of arrival..... 12
  
- Domestic Tourism
  - 4. Occupancy rate..... 14
  - 4.1 Arrival of tourists to Hotels.....14
  
- Transportation
  - 5. Air Transportation.....16
  - 5.1. Maritime Transportation.....18
  - 5.2 Main Ports..... 19
  
- Other Indicators
  - 6.1. Quarterly GDP tourism indicator.....21
  - 6.2. Tourism Employment.....22
  - 6.3. Results of Tourism Activity, table.....23
  - 6.4. Macroeconomic indicators, prospects.....24
  - 6.5. Mexico's key economic indicators.....25
  - 6.3. Economic context.....26

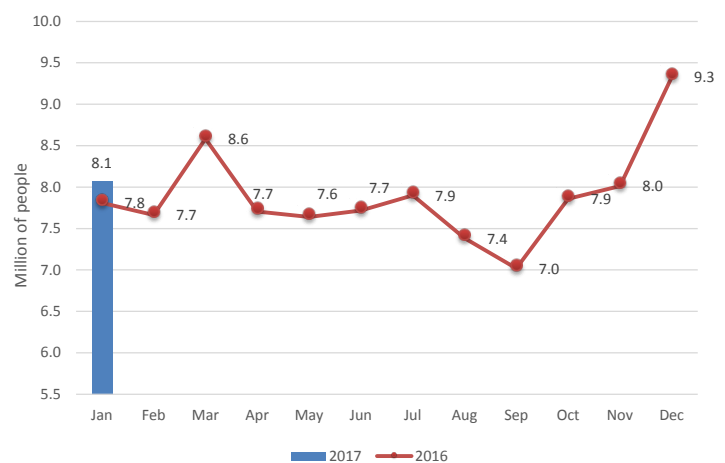




## ARRIVAL OF INTERNATIONAL VISITORS

**Chart 1.** According to Bank of Mexico, during January 2017 the number of international visitors arriving Mexico was **8.1 million**, that is 263 thousand higher than January 2016, which is equal to an increase of 3.4% in comparison to the same month of the previous year.

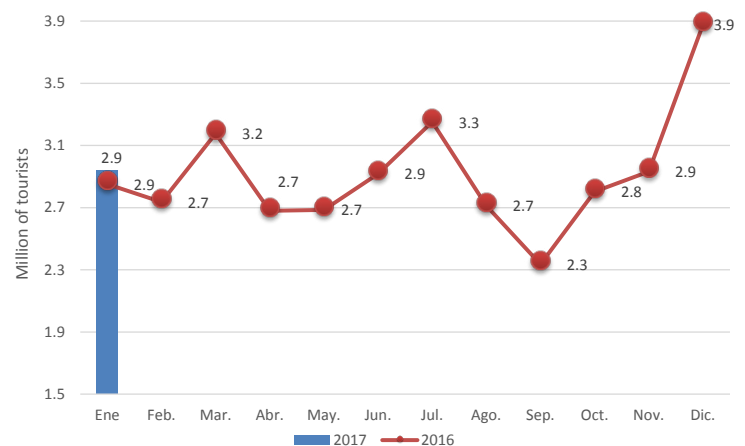
January	Million visitors	Change
2016	7.8	
2017	8.1	3.4%



## ARRIVAL OF INTERNATIONAL TOURISTS

**Chart 2.** The arrival of international tourists in January 2017 was **2.9 million**, reaching 88 thousand more than January 2016, increasing 3.1% in comparison to the same month of the previous year.

January	Million passengers	Change
2016	2.9	
2017	2.9	3.1%



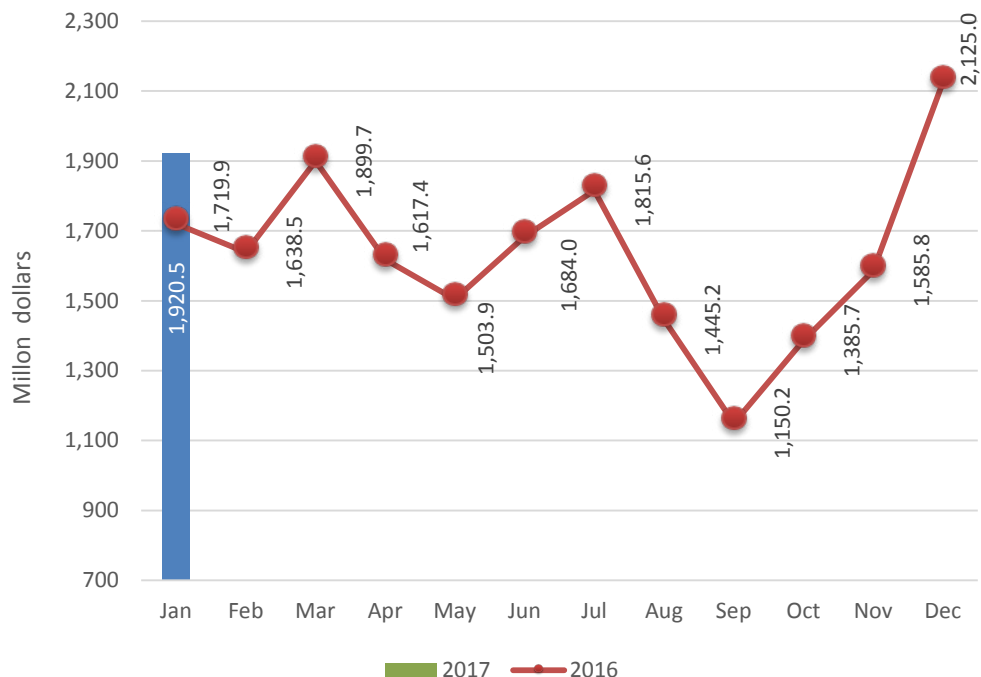
Note: In the graphs the sum of the data does not coincide with the accumulated period due to the rounding of figures.



## INTERNATIONAL TRAVEL RECEIPTS

**Chart 3.** Foreign currency income from the arrival of international visitors during January 2017 was **1,920 million dollars**, equivalent to an increase of 200 million dollars (11.7%) in comparison to January 2016.

January	Million dollars	Change
2016	1,719.9	
2017	1,920.5	11.7%



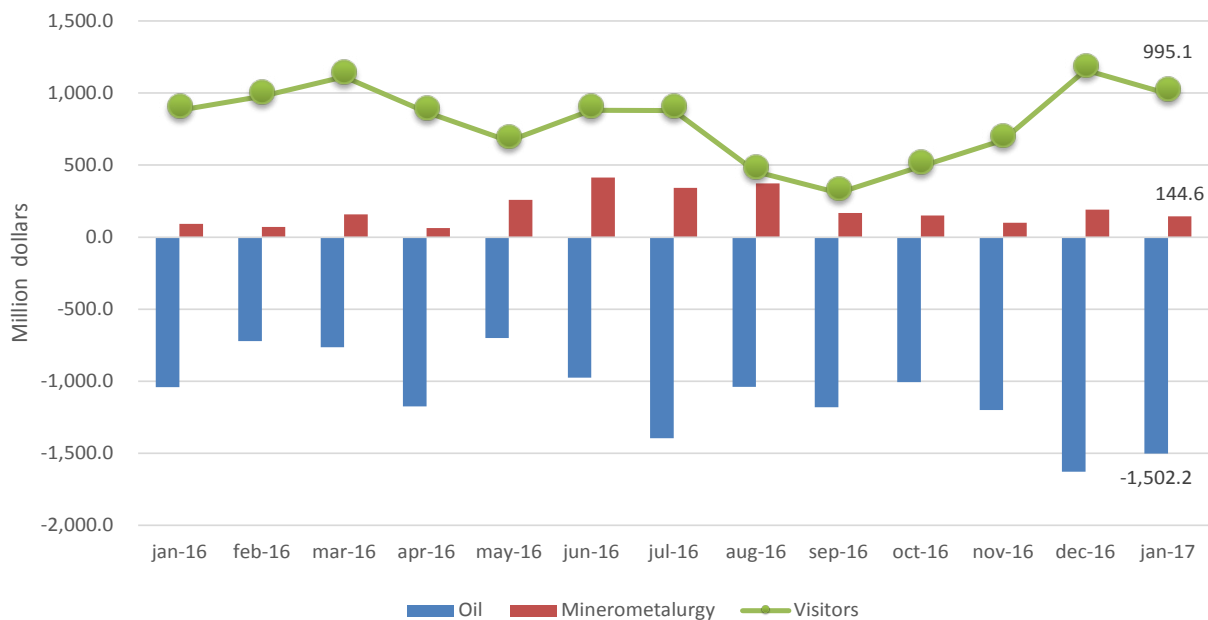


## INTERNATIONAL TRAVELERS BALANCE

**Chart 4.** The balance by international visitors in January 2017 registered **995 million dollars**, an increase of 13.0% in comparison to the same month in 2016.

January	Million dollars	Change
2016	880.5	
2017	995.1	13.0%

Monthly Balance in the Balance of Oil, Minerometalurgy and International Travelers



Note: In the graphs the sum of the data does not coincide with the accumulated period due to the rounding of figures.

Source: Bank of Mexico, Balance of payments

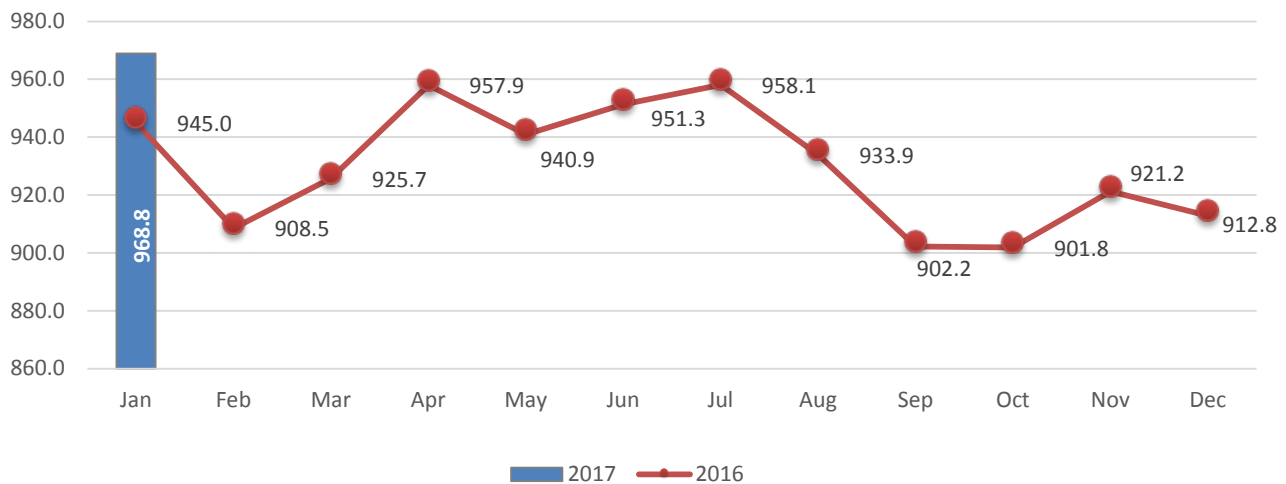
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## AVERAGE EXPENDITURE OF LONG-STAY TOURISTS, AIR TRANSPORT

**Chart 5.** During January 2017, the average expenditure of long-stay tourists by air was **968.8 dollars**, an increase of 23.8 dollars (2.5%) in comparison to January 2016.

January	Dollars	Change
2016	945.0	
2017	968.8	2.5%



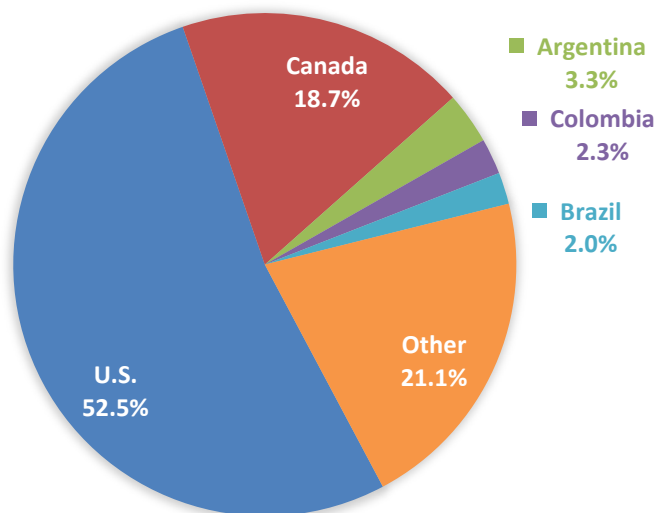






## INTERNATIONAL VISITORS TO MEXICO ARRIVING BY AIR

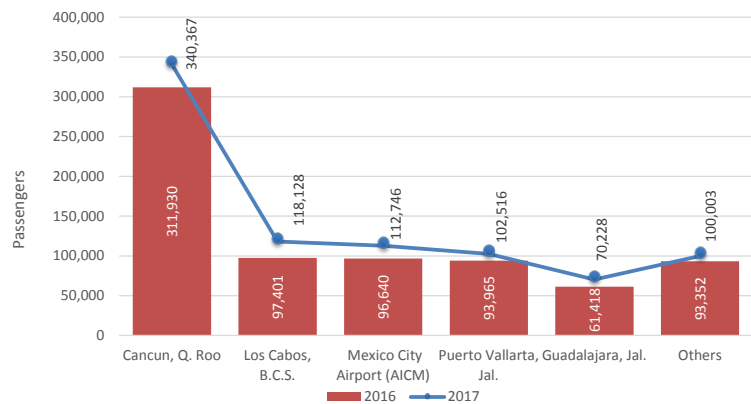
**Chart 6.** In January 2017, the arrival of foreign air-coming visitors who reside in the United States represents 52.5% of all foreign arrivals by air. From Latin America and the Caribbean region, the countries of residence with the highest number of foreign arrivals in México were Argentina and Colombia with 3.3% and 2.3% of total visitors respectively.





## AMERICAN PASSENGERS PER AIRPORT

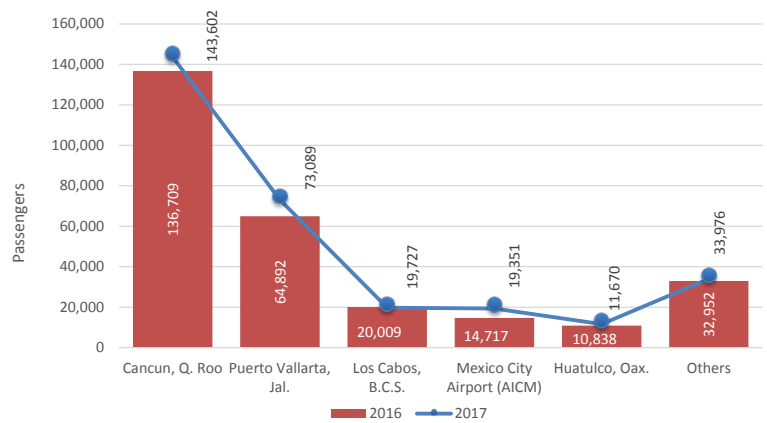
**Chart 7.** The American residents who arrived to Mexico by air increased 11.8% in January 2017 compared to the same month in 2016, registering **843.9 thousand passengers** who arrived firstly through the Cancun Airport, followed by Los Cabos Airport.



January	American passengers	Change
2016	754,706	
2017	843,988	11.8%

## CANADIAN PASSENGERS PER AIRPORT

**Chart 8.** The Canadian residents who arrived México by air was 7.6% higher during January 2017 in comparison to January 2016, registering **301.4 thousand passengers**, who arrived firstly through the Cancun Airport, followed by Puerto Vallarta Airport.



January	Canadian passengers	Change
2016	280,207	
2017	301,415	7.6%



## MAIN AIRPORTS OF ARRIVAL

**Figure 1.** In January 2017 the airports with the highest number of foreign passengers were: Cancun (689,418); Mexico City (299,064); Puerto Vallarta (180,609); Los Cabos (139,612); Guadalajara (76,118) and Cozumel (20,515); which represents 91.0% of all foreign passengers.



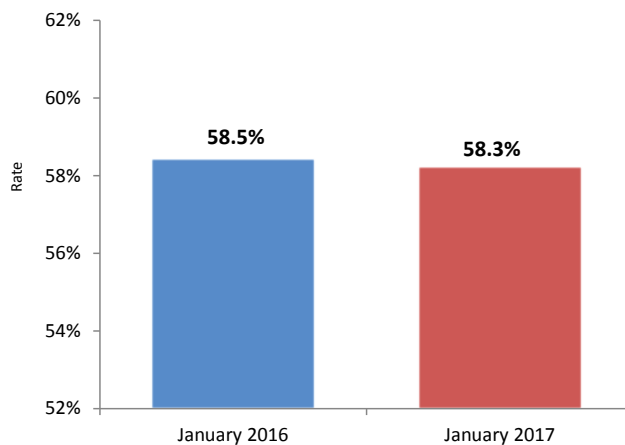
Baja California Sur		Jalisco		Mexico City		Quintana Roo			
Los Cabos B.C.S.		Pto. Vallarta	Gdl.	Mexico City		Cozumel	Cancun		
2016	119,567	2016	163,561	65,686	2016	252,227	2016	20,198	633,027
2017	139,612	2017	180,609	76,118	2017	299,064	2017	20,515	689,418
change	16.8%	change	10.4%	15.9%	change	18.6%	change	1.6%	8.9%

Note: Figures refers to events because the same person may have entered the country in more than one occasion. From this date only the residence of international passengers is considered and the nationality of the passengers is not longer used.



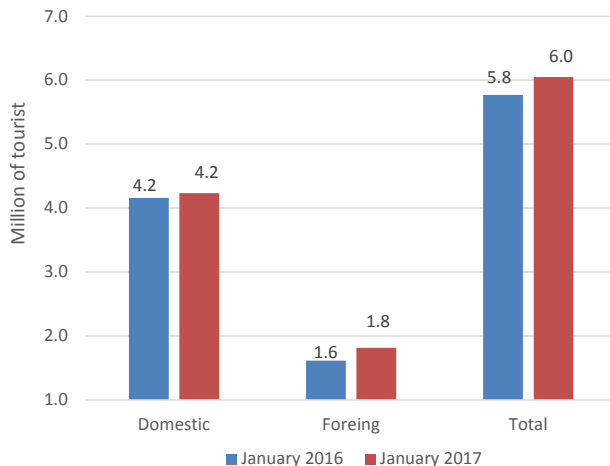


## OCCUPANCY RATE



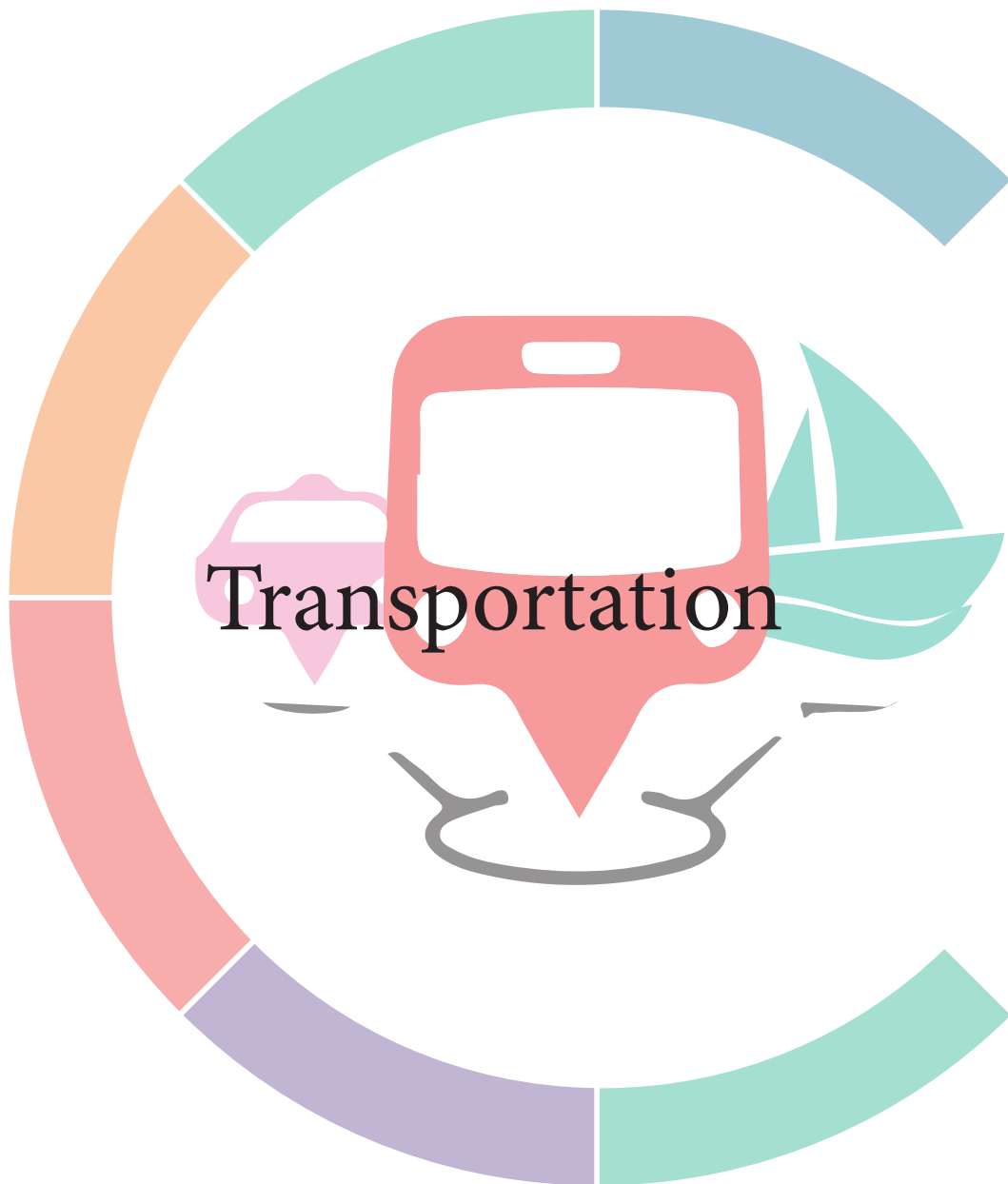
**Chart 9.** The percentage of hotel occupation in a group of 70 resorts during January 2017 reached 58.3%, 0.2 points lower in comparison to the same month last year. During the month in question, an increase of 8 thousand rooms available was recorded, which inversely affects the percentage of occupancy.

## ARRIVAL OF TOURISTS TO HOTELS



**Chart 10.** In January 2017, the arrival of domestic tourists to hotel rooms was 4.2 million tourists (70.0%), the remaining arrivals (30.0%) were from foreign tourists.

Note: In the graphs the sum of the data does not coincide with the accumulated period due to the rounding of figures.

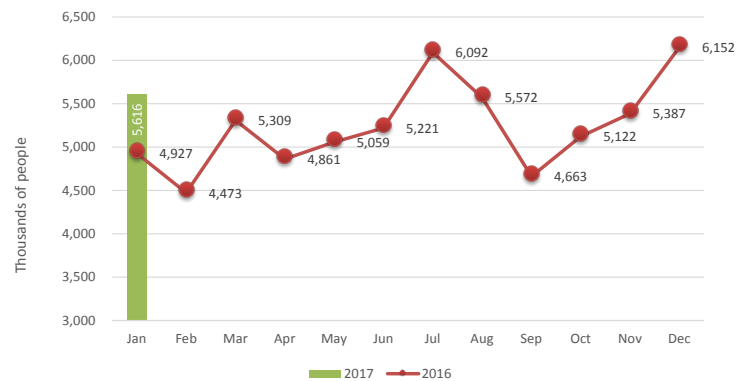




## AIR TRANSPORTATION

**Chart 11.** The number of passengers arriving by air increased 14% in January 2017 in comparison to the same month last year, reaching **5.6 million passengers**, equivalent to an increase of 690 thousand passengers.

January	Thousand passengers	Change
2016	4,927	
2017	5,616	14%



**Chart 12.** The number of passengers arriving by air on domestic flights in January 2017 was **3.5 million passengers**, representing 516.6 thousand of additional passengers (16.9%), in comparison to the same month last year.

January	Thousand passengers	Change
2016	3,052	
2017	3,569	16.9%

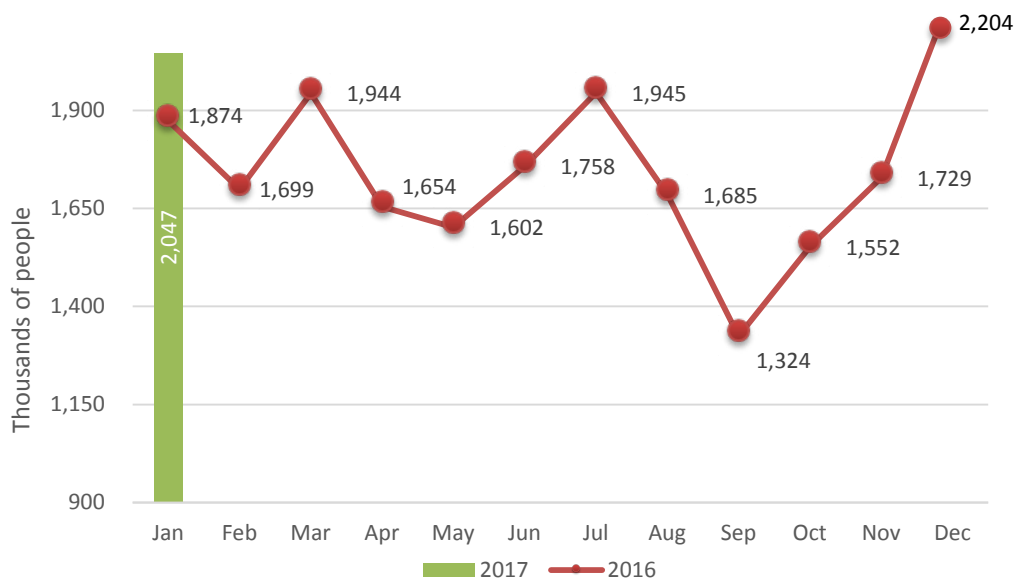






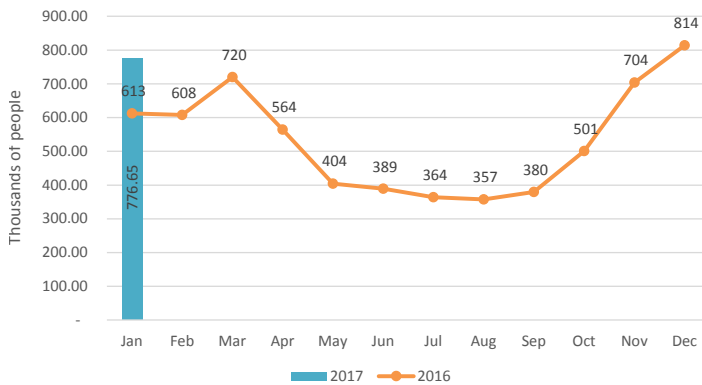
**Chart 13.** In January 2016, the number of passengers arriving by air on international flights increased 9.2% with **2 million passengers**, exceeding the 173 thousand of passengers from January 2016.

January	Thousand passengers	Change
2016	1,874	
2017	2,047	9.2%



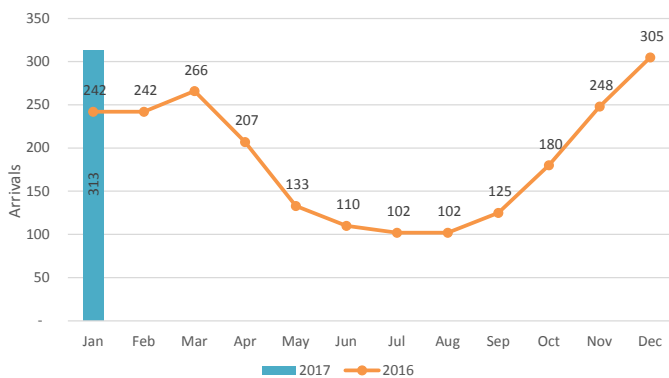


## MARITIME TRANSPORTATION



**Chart 14.** During January 2017, the number of cruise passengers reached **776.6 thousand passengers**, representing an increase of 164 thousand passengers (26.8%) compared to the same month in 2016.

January	Thousand passengers	Change
2016	613	
2017	776.6	26.8%



**Chart 15.** The number of cruise arrivals in January 2017 increased to 71, reaching 313, **an increase of 29.3%** in comparison to the same month last year.

January	Arrivals	Change
2016	242	
2017	313	29.3%



## MAIN PORTS

**Figure 2.** In January 2017 the ports that received the highest number of passengers were the following: Cozumel, Majahual and Ensenada; representing 76.9% of total arrivals in the month.



January

Ensenada			Cabo San Lucas			Puerto Vallarta			Majahual			Cozumel		
arrivals	passengers		arrivals	passengers		arrivals	passengers		arrivals	passengers		arrivals	passengers	
2016	22	55,258	2016	17	38,136	2016	13	32,646	2016	28	64,394	2016	128	354,689
2017	23	51,663	2017	26	43,659	2017	17	38,581	2017	40	111,340	2017	148	434,522
change	4.5%	-6.5%	change	52.9%	14.5%	change	30.8%	18.2%	change	42.9%	72.9%	change	21.3%	22.5%

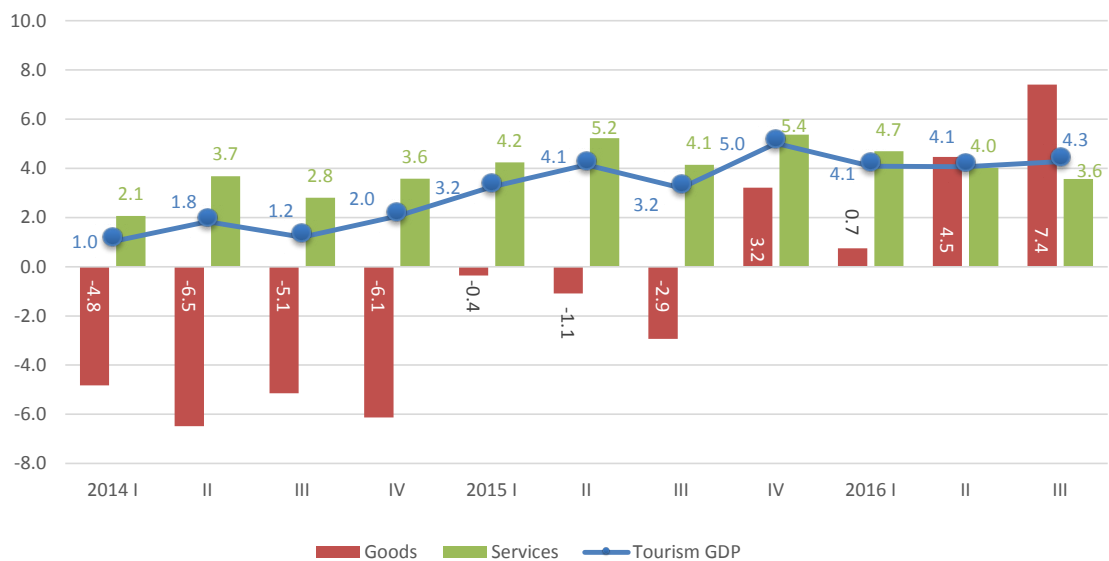




## QUARTERLY GDP TOURISM INDICATOR

**Chart 16.** According to seasonally adjusted series, the Quarterly Indicator of Tourism Activity **grew 4.3%** in the third quarter of 2016 compared to the same period in 2015. By component, **services increased 3.6%**, while goods are **almost at 7.4%** in the same period.

Tourism GDP	Change
2015-III	3.2%
2016-III	4.3%

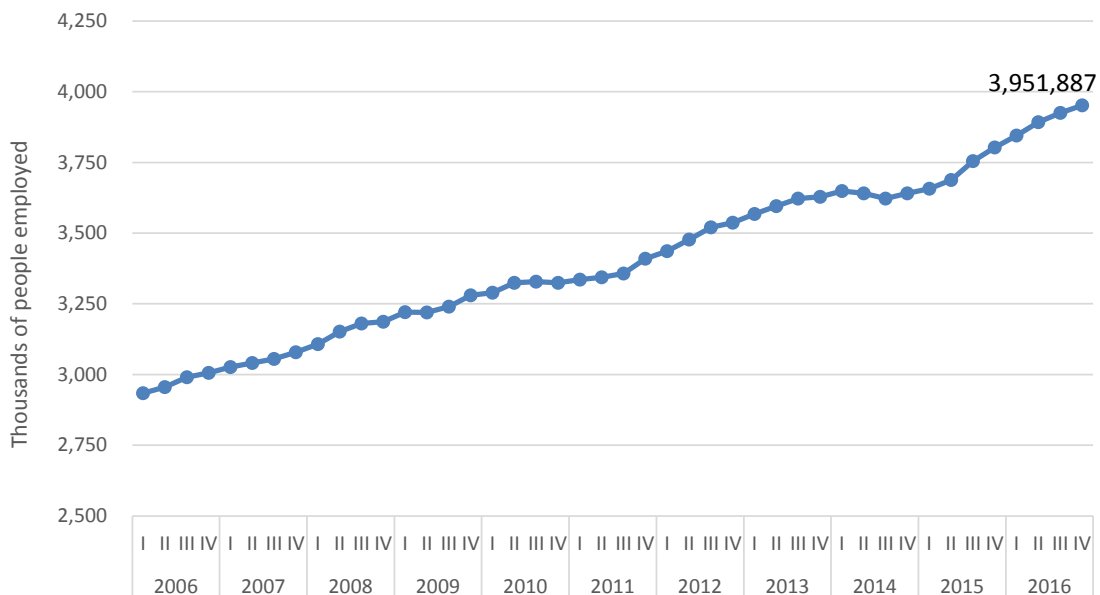




## TOURISM EMPLOYMENT

In the fourth quarter of 2017 around **3.9 million** people were employed in Mexican tourism sector, which accounted for **8.4% of the national employment**. This represented a rise of 3.9% in comparison to the same quarter of the previous year.

January	Thousands of people employed	Change
2015	3.8	
2016	3.9	3.9%



Note: Indirect or induced work is not included



## RESULTS OF TOURISM ACTIVITY, TABLE

RESULTS OF TOURISM ACTIVITY									
Subject	Unit of measurement	Year (January-December)				Change % 16/15	January		Change % 16/15
		2013	2014	2015	2016		2016	2017	
<b>International travelers balance (Banco de México)</b>									
Inbound traveler expenditures	Million dollars	13,949.0	16,208.4	17,733.7	19,570.8	10.4%	1,719.9	1,920.5	11.7%
Outbound traveler expenditures	Million dollars	9,122.4	9,605.8	10,098.1	10,226.9	1.3%	839.4	925.4	10.2%
International travelers balance	Million dollars	4,826.6	6,602.6	7,635.6	9,343.9	22.4%	880.5	995.1	13.0%
<b>International travelers to Mexico (Banco de México)</b>									
<b>Number of travelers (Thousand)</b>									
International visitors	Thousand	78,100.2	81,042.1	87,128.6	94,621.0	8.6%	7,810.2	8,073.3	3.4%
International tourists	Thousand	24,150.5	29,345.6	32,093.3	34,960.8	8.9%	2,851.1	2,938.8	3.1%
Long-stay tourists	Thousand	14,561.9	15,999.9	18,307.2	20,424.3	11.6%	1,692.1	1,831.5	8.2%
Border tourists	Thousand	9,588.6	13,345.7	13,786.1	14,536.6	5.4%	1,159.0	1,107.3	-4.5%
Same-day travelers	Thousand	53,949.7	51,696.5	55,035.3	59,660.2	8.4%	4,959.1	5,134.4	3.5%
In border area travelers	Thousand	49,394.2	45,911.2	48,920.5	52,965.6	8.3%	4,325.0	4,330.9	0.1%
In cruises travelers	Thousand	4,555.4	5,785.2	6,114.8	6,694.6	9.5%	634.2	803.5	26.7%
<b>Inbound travelers expenditure (Million dollars)</b>									
International visitors	Million dollars	13,949.0	16,208.4	17,733.7	19,570.8	10.4%	1,719.9	1,920.5	11.7%
International tourists	Million dollars	11,853.8	14,320.0	15,825.7	17,621.9	11.4%	1,559.2	1,739.7	11.6%
Long-stay tourists	Million dollars	11,311.5	13,579.9	15,035.0	16,852.6	12.1%	1,496.2	1,673.4	11.8%
Border tourists	Million dollars	542.2	740.1	790.7	769.3	-2.7%	63.0	66.3	5.1%
Same-day travelers	Million dollars	2,095.2	1,888.4	1,908.0	1,948.9	2.1%	160.7	180.8	12.5%
In border area travelers	Million dollars	1,737.1	1,469.6	1,508.9	1,548.1	2.6%	122.4	132.7	8.4%
In cruises travelers	Million dollars	358.1	418.8	399.2	400.8	0.4%	38.2	48.1	25.8%
<b>Average expenditure (dollars)</b>									
International visitors	Dollars	178.6	200.0	203.5	206.8	1.6%	220.2	237.9	8.0%
International tourists	Dollars	490.8	488.0	493.1	504.0	2.2%	546.9	592.0	8.2%
Long-stay tourists	Dollars	776.8	848.8	821.3	825.1	0.5%	884.2	913.7	3.3%
Border tourists	Dollars	56.5	55.5	57.4	52.9	-7.7%	54.4	59.8	10.0%
Same-day travelers	Dollars	38.8	36.5	34.7	32.7	-5.8%	32.4	35.2	8.7%
In border area travelers	Dollars	35.2	32.0	30.8	29.2	-5.2%	28.3	30.6	8.2%
In cruises travelers	Dollars	78.6	72.4	65.3	59.9	-8.3%	60.3	59.9	-0.7%
<b>Arrival of passengers on domestic and international flights (ASA)</b>									
Total Passengers arriving by air	Thousands	46,122.1	49,955.8	56,367.6	62,838.2	11.5%	4,926.8	5,616.4	14.0%
International flights	Thousands	15,703.3	17,125.6	19,279.3	20,971.7	8.8%	1,874.3	2,047.2	9.2%
Domestic flights	Thousands	30,418.8	32,830.2	37,088.3	41,866.6	12.9%	3,052.5	3,569.2	16.9%
<b>Foreign visitors by air and country of residence (Unidad de Política Migratoria)</b>									
United States of America	Thousands	6,630.3	7,348.5	8,604.6	9,643.9	12.1%	754.7	844.0	11.8%
Canada	Thousands	1,574.3	1,646.2	1,707.8	1,734.6	1.6%	280.2	301.4	7.6%
United Kingdom	Thousands	391.8	432.3	477.3	513.8	7.6%	30.0	30.4	1.3%
Argentina	Thousands	233.4	218.4	309.6	375.2	21.2%	38.6	53.3	38.1%
Colombia	Thousands	230.1	292.4	363.2	390.2	7.5%	30.2	37.0	22.6%
<b>Movements cruise (SCT, Dirección General de Puertos)</b>									
Passenger in cruises	Thousands	4,348.9	5,563.1	5,929.2	6,417.4	8.2%	612.7	776.7	26.8%
Cruise's arrivals	Number	1,622.0	2,091.0	2,180.0	2,262.0	3.8%	242.0	313.0	29.3%
<b>Hotel business* (SECTUR)</b>									
Percentage of hotel occupation	Percentage	55.6	57.1	59.6	60.3	0.70	58.5	58.3	(0.2)
Arrival of tourists to hotel rooms	Thousands	62,394.0	65,000.0	69,827.3	74,316.0	6.4%	5,770.5	6,048.7	4.8%
<b>Number of tourist jobs** (SECTUR based on ENOE)</b>									
Tourism employment	Thousands	3,628.2	3,641.0	3,803.4	3,951.9	3.9%	NA	NA	NA
<b>Quarterly Indicator of Tourism Activity*** (index 2008=100, seasonally adjusted series) INEGI.</b>									
<b>Third Quarter</b>									
Tourism GDP	Annual percentages	0.7	2.0	5.0	4.3	4.3	NA	NA	NA
Goods	Annual percentages	-4.1	-6.1	3.2	7.4	7.4	NA	NA	NA
Services	Annual percentages	2.2	3.6	5.4	3.6	3.6	NA	NA	NA
Internal tourism consumption	Annual percentages	1.4	0.8	6.0	6.1	6.1	NA	NA	NA
Domestic tourism consumption	Annual percentages	0.8	-1.9	3.0	3.2	3.2	NA	NA	NA
Inbound tourism consumption	Annual percentages	6.9	21.9	25.2	24.3	24.3	NA	NA	NA

\* A report from the Hotel Occupancy monitored weekly in 70 centers. Changes in percentage points in the case of hotel occupancy.

\*\* Quarterly figures, excluding induced employment.

\*\*\* For annual percentage change data for the last quarter of the current year compared to the last quarter of the previous year. For 2016 figures third quarter.

NA Not apply

Sources: Banco de México. ASA e INEGI, UPM, SCT, SECTUR.



## MACROECONOMIC INDICATORS, PROSPECTS

Macroeconomic Perspective on Key Indicators of Mexico				
Entity	Gross Domestic Product Constant prices (percent change)		Inflation (% dec/dec)	
	2017	2018	2017	2018
	International Monetary Fund	1.70	2.00	3.16
OCDE	2.27	2.37	3.45	3.61
Banco de México Survey	1.49	2.09	3.39	3.86
Ministry of the Treasury and Public Credit	2.0 a 2.6	2.0 a 3.0	3.20	3.00

Source: **IMF**, World Economic Outlook Database (October 2016); **OECD**, Economic Outlook (2016/10); **Bank of Mexico**, Expectations Survey Economic Specialist Private Sector (02/03/17); **Ministry of Finance and Public Credit**, General Criteria for Economic Policy 2017 (September, 2016)





## MEXICO'S KEY ECONOMIC INDICATORS

Entries	2011	2012	2013	2014	2015	2016	Jan-17
<b>General Economic Activity and Services Identified with Tourism</b>							
<b>Gross Domestic Product</b>							
. Millions of current pesos	14,550,014	15,626,907	16,118,031	17,258,964	18,241,982	19,522,652	
. Constant prices annual variations in %	4.0	4.0	1.4	2.3	2.6	2.3	
<b>Tertiary activities</b>							
<b>- Air Transportation (481)</b>							
. Millions of current pesos	24,368	27,720	27,063	34,708	39,827	50,112	
. Constant prices annual variations in %	-0.3	7.3	8.1	9.4	7.7	16.5	
<b>- Temporary Lodging Services (721)</b>							
. Millions of current pesos	137,648	151,099	163,718	179,525	200,137	219,572	
. Constant prices annual variations in %	2.4	8.2	5.6	6.0	5.6	3.8	
<b>- Food and Beverages Preparation Services (722)</b>							
. Millions of current pesos	160,238	172,438	177,145	185,939	208,668	225,523	
. Constant prices annual variations in %	0.8	3.0	-1.7	-0.3	6.1	3.8	
<b>Quarterly Indicators of Tourism Activity (ITAT)*</b>							
<b>Tourism Gross Domestic Product</b>							
. Constant prices, annual variation in %	2.9	4.6	0.6	1.7	3.6	2.4	
<b>Internal Tourism Consumption</b>							
. Constant prices, annual variation in %	1.8	2.9	0.9	0.9	4.5	6.0	
<b>- Domestic tourism consumption</b>							
. Constant prices, annual variation in %	2.9	2.3	1.0	-0.8	1.1	3.1	
<b>- Ibound tourism consumption</b>							
. Constant prices, annual variation in %	-6.2	7.8	0.5	14.7	28.8	24.1	
<b>Tourism Employment</b>							
<b>People Employed in the Tourism Sector (SECTUR)**</b>	3,409,804	3,536,686	3,628,195	3,640,970	3,803,441.7	3,951,886.8	
<b>Total number of IMSS-Insure Workers</b>							
<b>Employees insured by IMSS (average of the period)</b>	15,153,643	15,856,137	16,409,302	16,990,724	17,724,222	18,401,344	18,699,916
. Permanent	13,101,612	13,637,937	14,123,077	14,570,291	15,170,986	15,785,784	16,046,797
. Non-permanent (urban and field)	2,052,031	2,218,200	2,286,225	2,420,433	2,553,236	2,615,560	2,653,119
<b>Unemployment National Rate *** (closing of the period)</b>							
. Total Percentage of PEA	4.51	4.40	4.89	4.16	4.34	3.66	3.57
<b>Exchange Rate and Prices****</b>							
<b>National Price Index (closing of the period)</b>							
Consumer (percent variation)	3.82%	3.57%	3.97%	4.08%	2.13%	3.36%	4.7%
. Air transport (percent variation)	7.58%	-7.74%	0.20%	16.72%	3.17%	9.82%	-7.82%
. Hotel (percent variation)	6.41%	1.11%	3.14%	4.84%	4.18%	7.77%	8.18%
. Package Tourist Services (percent variation)	5.72%	1.59%	4.90%	5.13%	7.62%	6.38%	4.46%
. Restaurants (percent variation)	4.43%	4.20%	3.62%	6.03%	4.86%	5.47%	5.94%
<b>Exchange Rate (peso / dollar)</b>							
. Average of the period	12.423	13.169	12.772	13.292	15.848	18.664	21.3732
<b>Business Cycle Indicators and Consumer Confidence (monthly difference*****)</b>							
. Coincident Indicator	0.060	-0.064	-0.031	0.029	-0.025	0.041	ND
. Forward Indicator	0.027	0.094	0.006	-0.086	-0.085	-0.188	-0.195
. Confidence Consumer Index	0.113	0.072	-0.266	0.057	0.066	-0.106	-0.137

N.D. Not available.

\* For 2016 figures for the third quarter.

\*\* The Tourist Employment dataset is smoothed by averaging the last four quarters of it. The objective is to eliminate irregular and short-term fluctuations from the series.

\*\*\* Percentage of the total of the Economically Active Population. For annual and monthly figures data at the end of period and, period average for quarterly information

\*\*\*\* For consumer prices at the end of the year, annual variations and for monthly data the variation is same month previous year.

\*\*\*\*\* Monthly difference in points (period closing).

Sources: SECTUR, INEGI, STPS, Bank of Mexico.



## ECONOMIC CONTEXT

### International

Global GDP growth is projected to pick up modestly to around 3½ per cent in 2018, from just under 3% in 2016, boosted by fiscal initiatives in the major economies. The forecast is broadly unchanged since November 2016.

Confidence has improved, but consumption, investment, trade and productivity are far from strong, with growth slow by past norms and higher inequality. Disconnect between financial markets and fundamentals, potential market volatility, financial vulnerabilities and policy uncertainties could, however, derail the modest recovery.

The positive assessment reflected in market valuations appears disconnected from real economy prospects. The interest-rate cycle turned in mid-2016 and rising divergence in interest rates between major economies heightens risks of exchange rate volatility.

Vulnerabilities remain in some advanced economies from rapid house price increases. Risks to emerging market economies are high, including from higher corporate debt, rising non-performing loans and vulnerability to external shocks.

### National

In the last quarter of 2016, the Mexican economy continued its expansion, albeit at a slower rate of growth than in the third quarter. In particular, external demand continued to improve, while private consumption maintained a positive trajectory. In contrast, the weak performance of the investment persisted.

In particular, at the close of 2016 and in the first month of 2017, the depreciation of the real exchange rate and the incipient recovery of global demand contributed to a recovery in manufacturing exports after the negative trend they showed during 2015 and early 2016.

Even the recovery of US external demand relative to performance observed in early 2016 would appear to have increased demand for Mexican products. In this way, the improvement in Mexican exports presented both in those directed to the United States, and those destined for the rest of the world.