SECTUR
SECRETARÍA DE TURISMO

DATATUR 360
Análisis Integral del Turismo

Results of Tourism Activity

Mexico, May 2017

Undersecretariat of Planning and Tourism Policy

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

DIRECTORY

ENRIQUE DE LA MADRID CORDERO
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Forewarning: The figures in 2017 are preliminary and subject to revisions by the sources.

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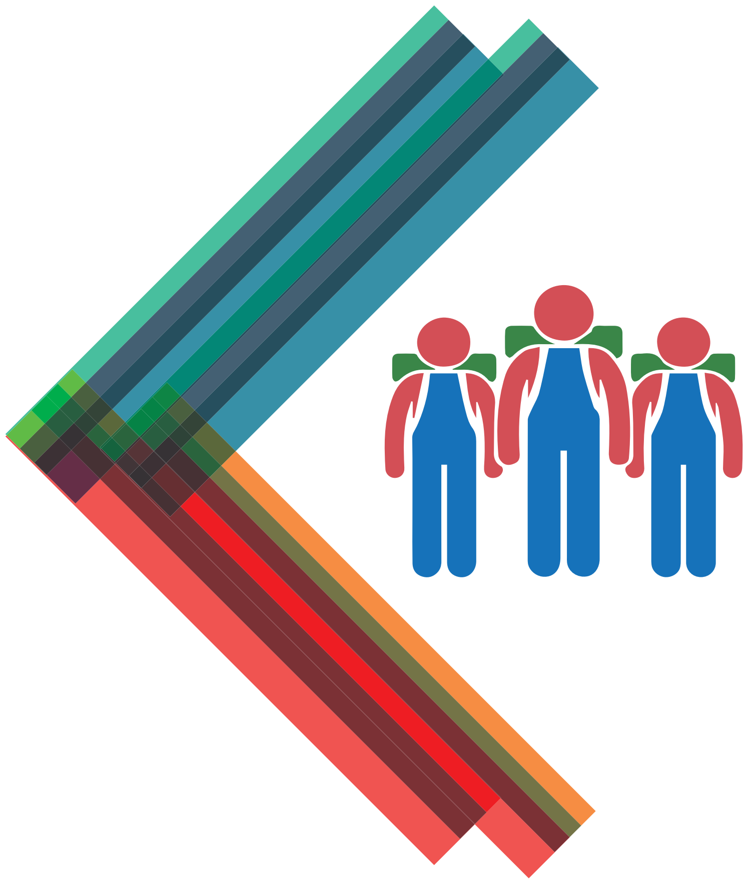

International Visitors to Mexico

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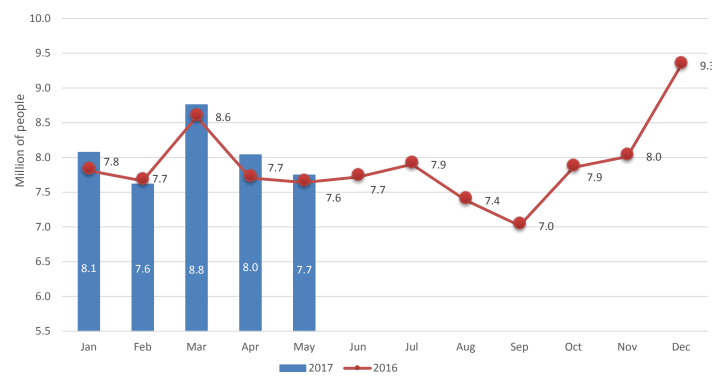
ARRIVAL OF INTERNATIONAL VISITORS

Chart 1. According to Bank of Mexico, during January-May 2017 the number of international visitors arriving Mexico was 40.2 million, that is 836 thousand higher than January-May 2016 and equal to an increase of 2.1% in comparison to the same period of the previous year.

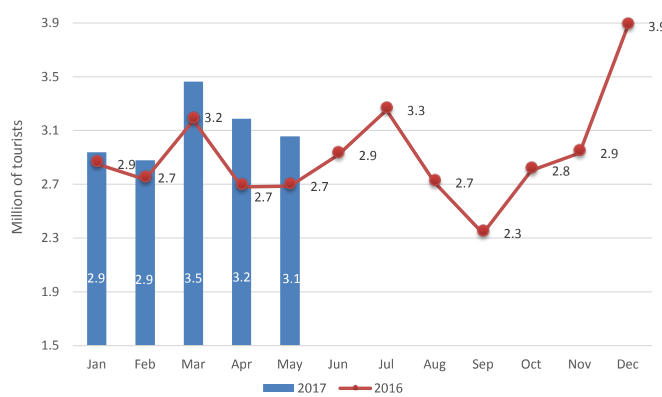
January-May	Million visitors	Change
2016	39.4	
2017	40.2	2.1%



ARRIVAL OF INTERNATIONAL TOURISTS

Chart 2. The arrival of international tourists in January-May 2017 was 15.5 million, reaching one million 394 thousand more than January-May 2016, increasing 9.9% in comparison to the same period of the previous year.

January- May	Million passengers	Change
2016	14.1	
2017	15.5	9.9%



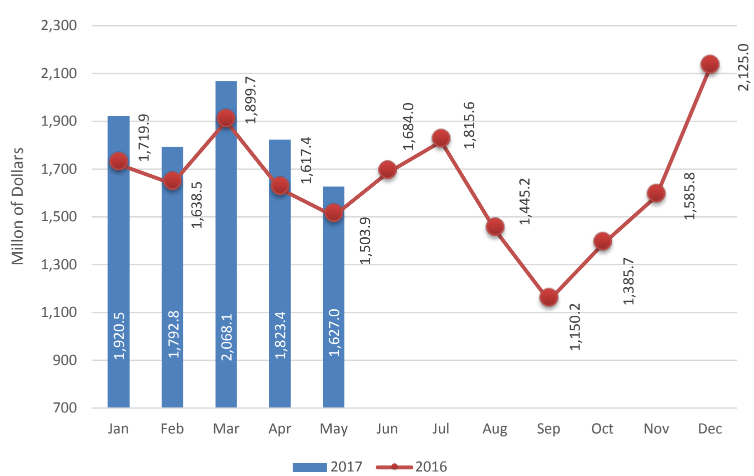
Note: In the graphs the sum of the data does not coincide with the accumulated period due to the rounding of figures.

Source: Bank of Mexico, Balance of payments.
http://www.datatur.sectur.gob.mx/SitePages/VisitantesInternacionales.aspx

INTERNATIONAL TRAVEL RECEIPTS

Chart 3. Foreign currency income from the arrival of international visitors during January-May 2017 was 9,232 million dollars, equivalent to an increase of 10.2% in comparison to same period 2016.

January-May	Million dollars	Change
2016	8,379	
2017	9,232	10.2%

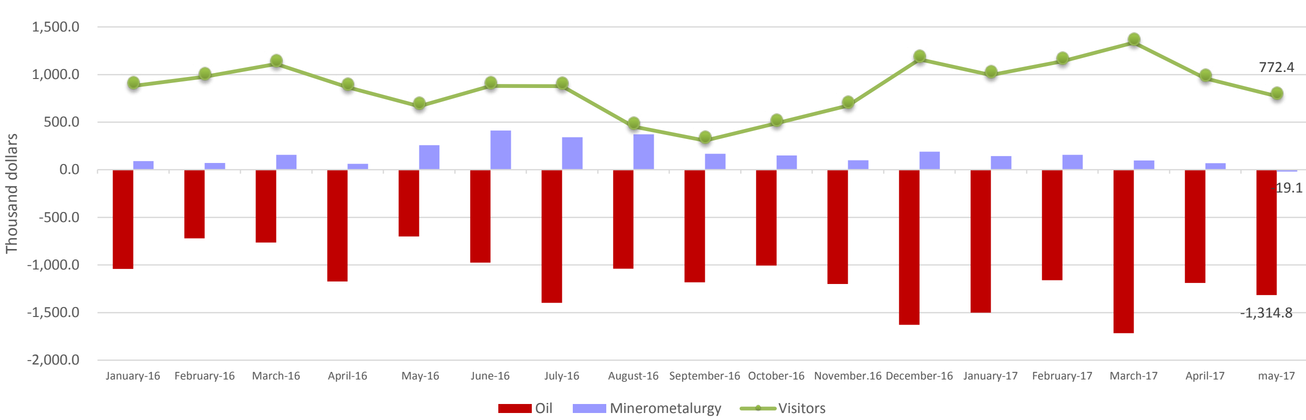


INTERNATIONAL TRAVELERS BALANCE

Chart 4. The balance by international visitors in January-May 2017 registered 5,200 million dollars, an increase of 15.5% in comparison to the same period in 2016.

January-May	Million dollars	Change
2016	4,502.4	
2017	5,200.5	15.5%

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



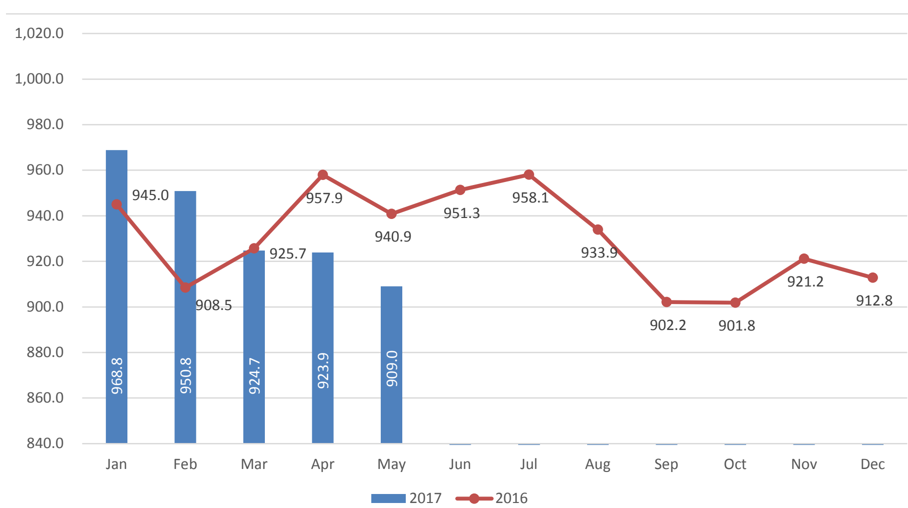
Note: In the graphs the sum of the data does not coincide with the accumulated period due to the rounding of figures.

Source: Bank of Mexico, Balance of payments
http://www.datatur.sectur.gob.mx/SitePages/VisitantesInternacionales.aspx

AVERAGE EXPENDITURE OF LONG-STAY TOURISTS, AIR TRANSPORT

Chart 5. During January-May 2017, the average expenditure of long-stay tourists by air was 935.9 dollars, an increase of 0.1% in comparison to January-May 2016.

January-May	Dollars	Change
2016	934.9	
2017	935.9	0.1%

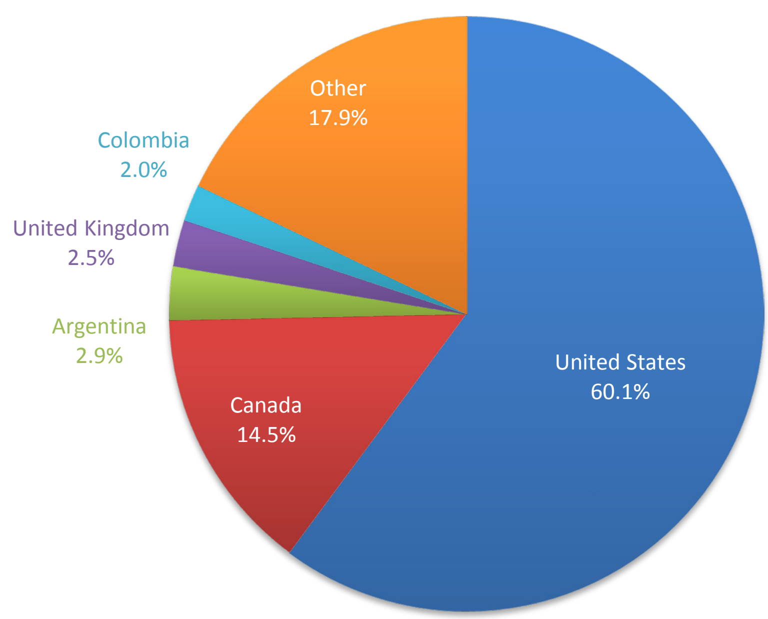


Source: Bank of Mexico, Balance of payments
http://www.datatur.sectur.gob.mx/SitePages/Visitantes%20Por%20Nacionalidad.aspx

Air Transportation

INTERNATIONAL VISITORS TO MEXICO ARRIVING BY AIR

Chart 6. In January-May 2017, the arrival of foreign air-coming visitors who reside in the United States represents 60.1% of all foreign arrivals by air. From the Latin American and the Caribbean region, the countries of residence with the highest number of foreign arrivals in Mexico were Argentina and Colombia, with 2.9% and 2% of total visitors respectively.

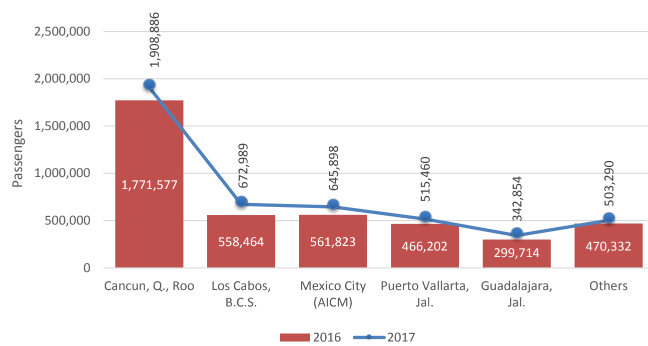


Note: In the graphs the sum of the data does not coincide with the accumulated period due to the rounding of figures

Source: Migration Policy Unit, SEGOB
http://www.datatur.sectur.gob.mx/SitePages/Visitantes%20Por%20Nacionalidad.aspx

AMERICAN PASSENGERS PER AIRPORT

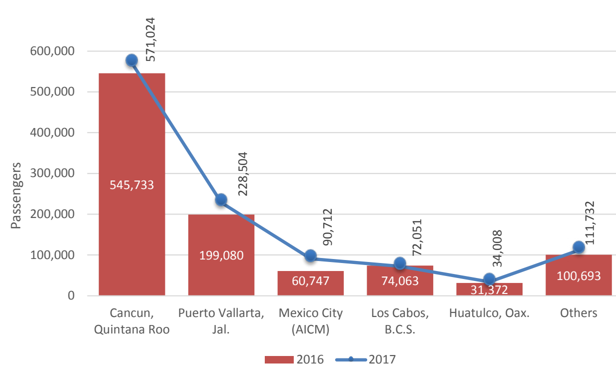
Chart 7. The American residents who arrived to Mexico by air increased 11.2% in January-May 2017 compared to the same period of 2016, registering four million 589 thousands passengers who arrived ffirstly at the Cancun Airport, followed by Los Cabos Airport.



January-May	American passengers	Change
2016	4,128,112	
2017	4,589,377	11.2%

CANADIAN PASSENGERS PER AIRPORT

Chart 8. The Canadian residents who arrived to Mexico by air was 9.5% higher during January-May 2017 in comparison to January-May 2016. They firstly arrived at the Cancun Airport, followed by Puerto Vallarta Airport.



January-May	Canadian passengers	Change
2016	1,011,688	
2017	1,108,031	9.5%

Source: Migration Policy Unit, SEGOB
http://www.datatur.sectur.gob.mx/SitePages/Visitantes%20Por%20Residencia.aspx

MAIN AIRPORTS OF ARRIVAL

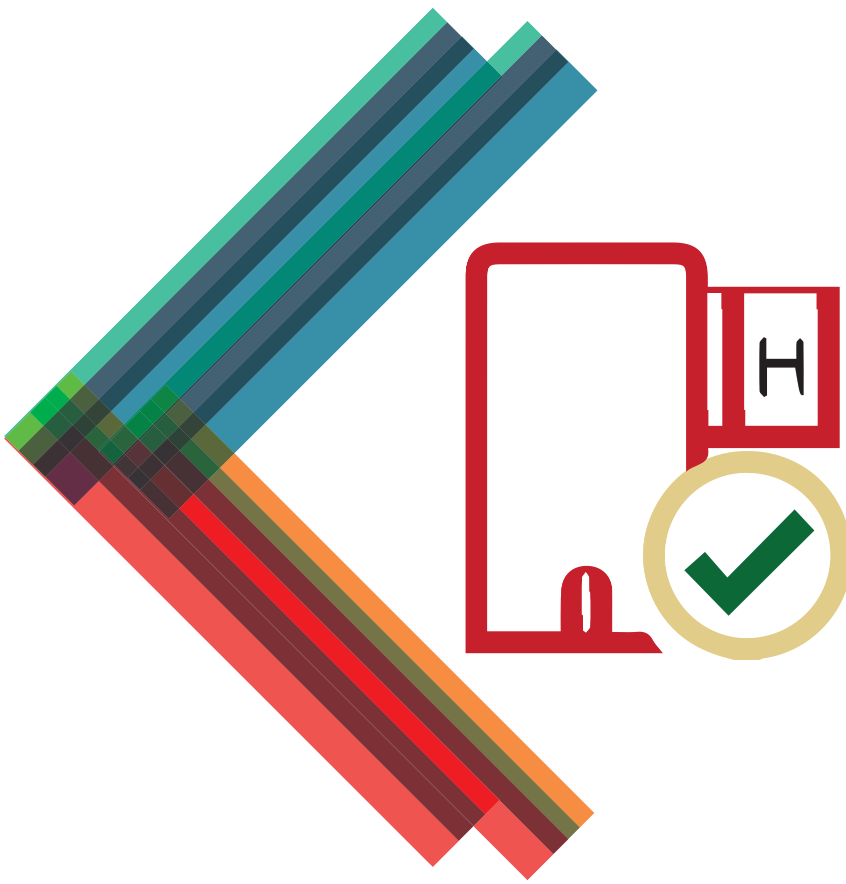
Figure 1. In January-May 2017 the airports with the highest number of foreign passengers were: Cancun (3,419,468); Mexico City (1,598,893); Puerto Vallarta (768,016); Los Cabos (754,807); Guadalajara (370,363) and Cozumel (103,458); which represents 91.9% of all foreign passengers.

INTERNATIONAL PASSENGERS
JANUARY- MAY

Baja California Sur		Jalisco			Mexico City		Quintana Roo		
Los Cabos B.C.S.		Pto. Vallarta		Gdl.	Mexico City			Cancún	Cozumel
2016	641,506	2016	686,480	321,605	2016	1,349,110	2016	3,159,535	101,656
2017	754,807	2017	768,016	370,363	2017	1,598,893	2017	3,419,468	103,458
var	17.7%	var	11.9%	15.2%	var	18.5%	var	8.2%	1.8%

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.

Source: Migration Policy Unit, SEGOB
http://www.datatur.sectur.gob.mx/SitePages/Visitantes%20Por%20Residencia.aspx



Domestic Tourism

OCCUPANCY RATE

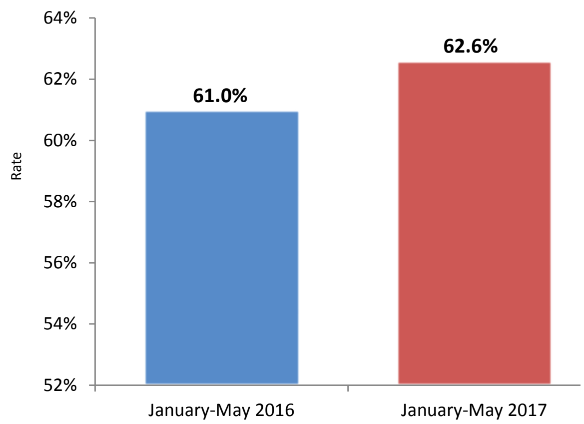
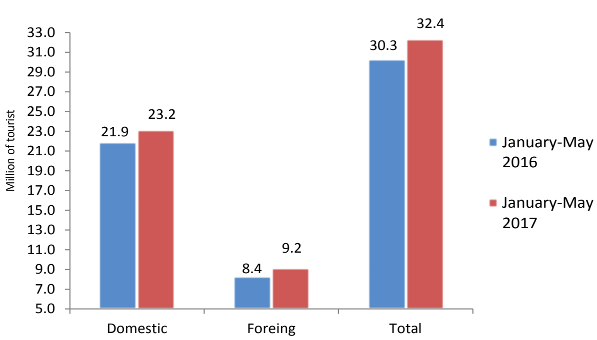


Chart 9. The percentage of hotel occupation in a group of 70 resorts during January-May 2017 reached 62.6%, level 1.6 points higher in comparison to the same period of last year.

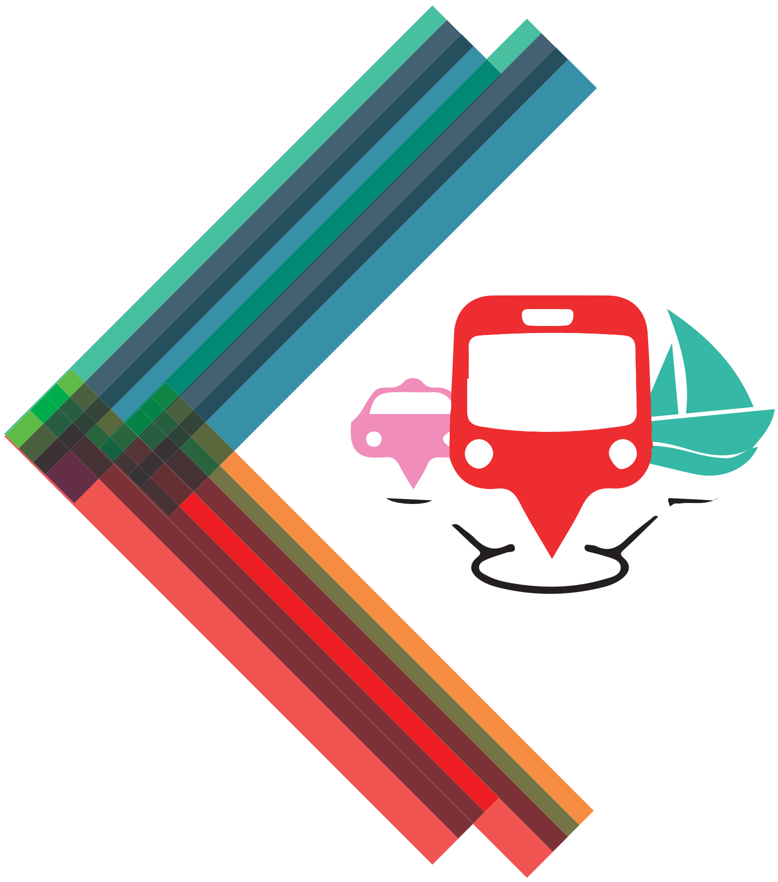
ARRIVAL OF TOURISTS TO HOTELS

Chart 10. In January-May 2017, the arrival of domestic tourists to hotel rooms was 23.2 million tourists (71.6%), the remaining arrivals (28.4%) were from foreign tourists.



Notes: Total occupancy is a weighted average of the 70 destinations monitored.
In the graphs the sum of the data does not coincide with the accumulated period due to the rounding of figures.

Source: Information of 70 resorts monitored by DataTur.
http://www.datatur.sectur.gob.mx/SitePages/ActividadHotelera.aspx



Transportation

AIR TRANSPORTATION

Chart 11. The number of passengers arriving by air increased 11.6% in January-May 2017 in comparison to the same period last year, reaching 27.5 million passengers, equivalent to an increase of two million 854 thousand passengers.

January-May	Thousand passengers	Change
2016	24,629.0	
2017	27,483.9	11.6%

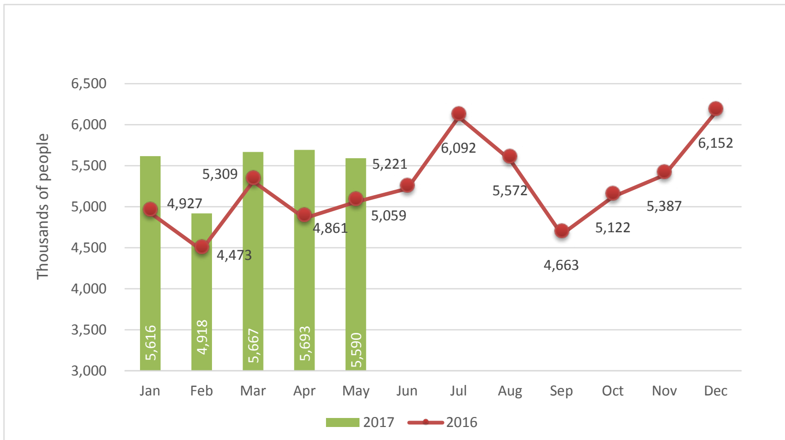
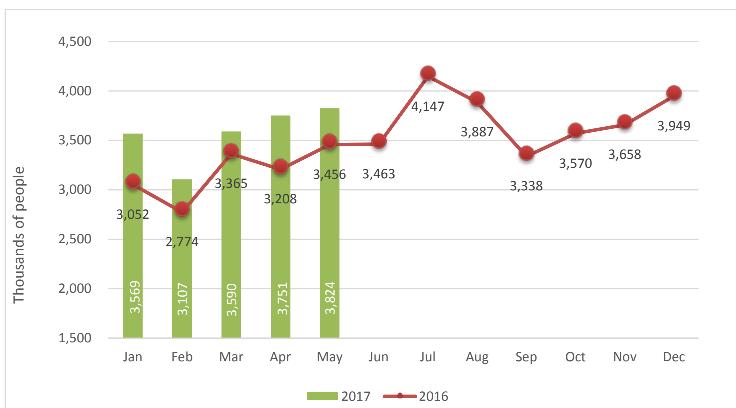


Chart 12. The Number of passengers arriving by air on domestic flights in January-May 2017 was 17.8 million passengers, representing one million 987 thousand of additional passengers (12.5%), in comparison to the same period last year.

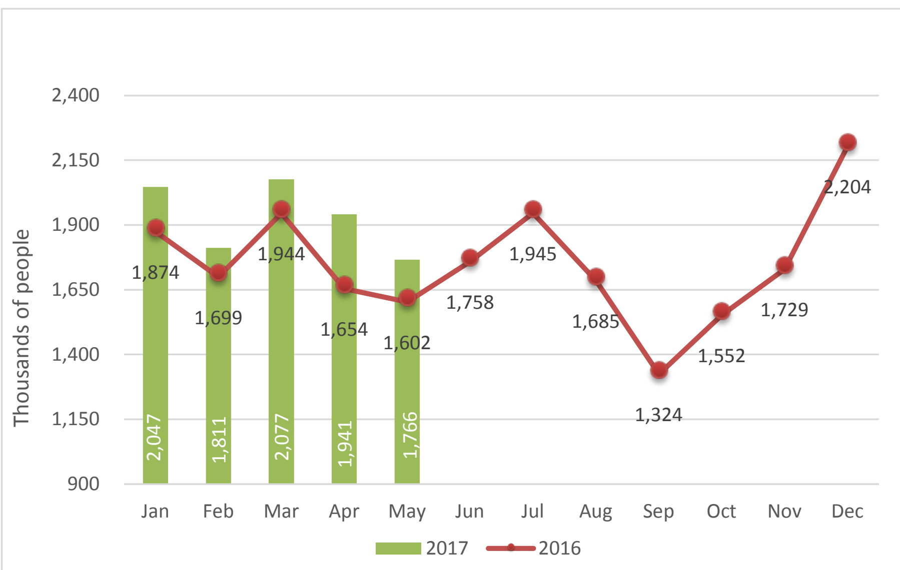
January-May	Thousand passengers	Change
2016	15,854.9	
2017	17,841.9	12.5%



Preliminary figures / Source: Airports and Auxiliary Services (SCT)
http://www.datatur.sectur.gob.mx/SitePages/TrasnAerea.aspx

Chart 13. In January-May 2017, the number of passengers arriving by air on international flights increased 9.9%, reaching 9.6 million passengers, exceeding by 868 thousand of passengers from January-May 2016.

January-May	Thousand passengers	Change
2016	8,774.1	
2017	9,642.0	9.9 %



MARITIME TRANSPORTATION

Chart 14. During January-May 2017, the number of cruise passengers reached three million 360 thousand passengers, representing an increase of 452 thousand passengers (15.5%) compared to the same period 2016.

January-May	Thousand passengers	Change
2016	2,908.5	
2017	3,360.2	15.5%

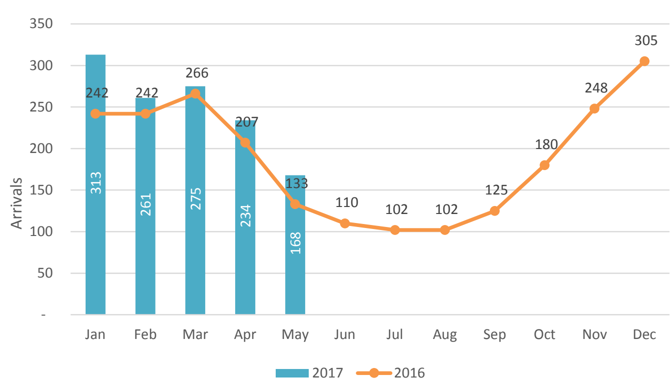


Chart 15. The number of cruise arrivals in January-May 2017 increased in 161, reaching one thousand and 83 cruises, an increase of 14.8% in comparison to the same period last year.

January-May	Arrivals	Change
2016	1,090	
2017	1,251	14.8%

Source: General Coordination of Ports and Merchant Navy, Ministry of Communications and Transportation (SCT)
http://www.datatur.sectur.gob.mx/SitePages/Actividades%20En%20Crucero.aspx

MAIN PORTS

Figure 2. In January-May 2017 the ports that received the highest number of passengers were the following: Cozumel, Majahual and Ensenada; representing 77.4% of the total arrivals in the month.

JANUARY- MAY

Ensenada	arrivals	passengers
2016	110	282,404
2017	112	275,092
var	1.8%	-2.6%

Cabo San Lucas	arrivals	passengers
2016	82	186,305
2017	95	200,994
var	15.9%	7.9%

Puerto Vallarta	arrivals	passengers
2016	68	161,455
2017	72	167,703
var	5.9%	3.9%

Majahual	arrivals	passengers
2016	106	271,776
2017	156	438,539
var	47.2%	61.4%

Cozumel	arrivals	passengers
2016	542	1,674,587
2017	599	1,887,342
var	10.5%	12.7%

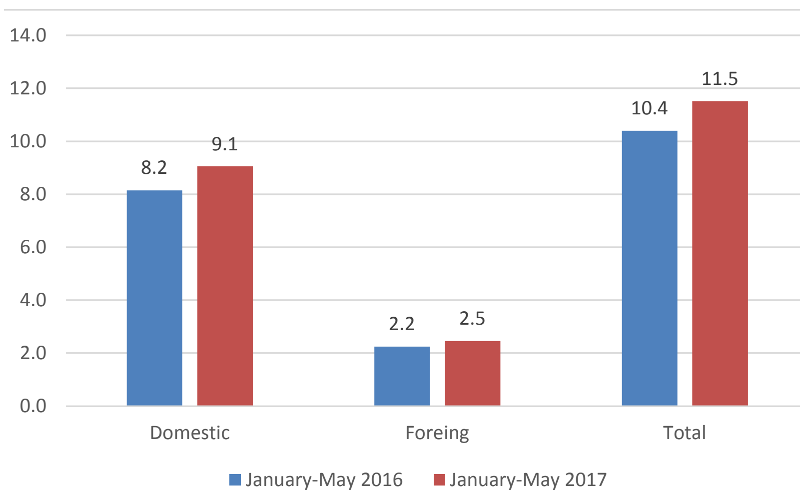
Source: General Coordination of Ports and Merchant Navy, Ministry of Communications and Transportation (SCT)
http://www.datatur.sectur.gob.mx/SitePages/Actividades%20En%20Crucero.aspx

Museums and archeological sites

VISITORS TO MUSEUMS AND ARCHEOLOGICAL SITES

During January-May 2017, the National Institute of Anthropology and History reported 11.5 million visitors, 10.8% higher than reported in the same period of 2016. Of the total number of visitors, 78.6% corresponded to national visitors and the 21.4% to foreigners.

January-May	Million visitors	Change
2016	10.4	
2017	11.5	10.8%



Source: National Institute of Anthropology and History (INAH)

Other Indicators

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RESULTS OF TOURISM ACTIVITY, TABLE

Subject	Unit of measurement	Year (January-December) 2013	2014	2015	2016	Change % 16/15	January-May 2016	2017	Change % 17/16
International travelers balance (Banco de México)									
Inbound traveler expenditures	Million dollars	13,949.0	16,208.4	17,733.7	19,570.8	10.4%	8,379.4	9,231.8	10.2%
Outbound traveler expenditures	Million dollars	9,122.4	9,605.8	10,098.1	10,226.9	1.3%	3,877.0	4,031.3	4.0%
International travelers balance	Million dollars	4,826.6	6,602.6	7,635.6	9,343.9	22.4%	4,502.4	5,200.5	15.5%
International travelers to Mexico (Banco de México)									
Number of travelers (Thousand)									
International visitors	Thousand	78,100.2	81,042.1	87,128.6	94,621.0	8.6%	39,400.0	40,235.8	2.1%
International tourists	Thousand	24,150.5	29,345.6	32,093.3	34,960.8	8.9%	14,131.2	15,525.2	9.9%
Long-stay tourists	Thousand	14,561.9	15,999.9	18,307.2	20,424.3	11.6%	8,424.7	9,281.6	10.2%
Border tourists	Thousand	9,588.6	13,345.7	13,786.1	14,536.6	5.4%	5,706.5	6,243.6	9.4%
Same-day travelers	Thousand	53,949.7	51,696.5	55,035.3	59,660.2	8.4%	25,268.8	24,710.7	-2.2%
In border area travelers	Thousand	49,394.2	45,911.2	48,920.5	52,965.6	8.3%	22,205.2	21,037.0	-5.3%
In cruises travelers	Thousand	4,555.4	5,785.2	6,114.8	6,694.6	9.5%	3,063.6	3,673.6	19.9%
Inbound travelers expenditure (Million dollars)									
International visitors	Million dollars	13,949.0	16,208.4	17,733.7	19,570.8	10.4%	8,379.4	9,231.8	10.2%
International tourists	Million dollars	11,853.8	14,320.0	15,825.7	17,621.9	11.4%	7,540.9	8,361.9	10.9%
Long-stay tourists	Million dollars	11,311.5	13,579.9	15,035.0	16,852.6	12.1%	7,233.8	8,014.4	10.8%
Border tourists	Million dollars	542.2	740.1	790.7	769.3	-2.7%	307.1	347.4	13.1%
Same-day travelers	Million dollars	2,095.2	1,888.4	1,908.0	1,948.9	2.1%	838.5	869.9	3.7%
In border area travelers	Million dollars	1,737.1	1,469.6	1,508.9	1,548.1	2.6%	654.7	651.3	-0.5%
In cruises travelers	Million dollars	358.1	418.8	399.2	400.8	0.4%	183.8	218.6	19.0%
Average expenditure (dollars)									
International visitors	Dollars	178.6	200.0	203.5	206.8	1.6%	212.7	229.4	7.9%
International tourists	Dollars	490.8	488.0	493.1	504.0	2.2%	533.6	538.6	0.9%
Long-stay tourists	Dollars	776.8	848.8	821.3	825.1	0.5%	858.6	863.5	0.6%
Border tourists	Dollars	56.5	55.5	57.4	52.9	-7.7%	53.8	55.6	3.4%
Same-day travelers	Dollars	38.8	36.5	34.7	32.7	-5.8%	33.2	35.2	6.1%
In border area travelers	Dollars	35.2	32.0	30.8	29.2	-5.2%	29.5	31.0	5.0%
In cruises travelers	Dollars	78.6	72.4	65.3	59.9	-8.3%	60.0	59.5	-0.8%
Arrival of passengers on domestic and international flights (ASA)									
Total Passengers arriving by air	Thousands	46,122.1	49,955.8	56,367.6	62,838.2	11.5%	24,629.0	27,483.9	11.6%
International flights	Thousands	15,703.3	17,125.6	19,279.3	20,971.7	8.8%	8,774.1	9,642.0	9.9%
Domestic flights	Thousands	30,418.8	32,830.2	37,088.3	41,866.6	12.9%	15,854.9	17,841.9	12.5%
Foreign visitors by air and country of residence (Unidad de Política Migratoria)									
United States of America	Thousands	6,630.3	7,348.5	8,604.6	9,643.9	12.1%	4,128	4,589	11.2%
Canada	Thousands	1,574.3	1,646.2	1,707.8	1,734.6	1.6%	1,012	1,108	9.5%
United Kingdom	Thousands	391.8	432.3	477.3	513.8	7.6%	189	193	1.8%
Argentina	Thousands	233.4	218.4	309.6	375.2	21.2%	172	220	28.0%
Colombia	Thousands	230.1	292.4	363.2	390.2	7.5%	124	153	23.8%
Movements cruise (SCT, Dirección General de Puertos)									
Passenger in cruices	Thousands	4,348.9	5,563.1	5,929.2	6,417.4	8.2%	2,908.5	3,360.2	15.5%
Cruise's arrivals	Number	1,622.0	2,091.0	2,180.0	2,262.0	3.8%	1,090.0	1,251.0	14.8%
Hotel business* (SECTUR)									
Percentaje of hotel accupation	Percentage	55.6	57.1	59.6	60.3	0.70	61.0	62.6	1.6
Arrival of tourists to hotel rooms	Thousands	62,394.0	65,000.0	69,827.3	74,316.0	6.4%	30,298.4	32,361.7	6.8%
Number of tourist jobs (SECTUR based on ENOE)**									
Tourism employment	Thousands	3,628.2	3,641.0	3,803.4	3,951.9	3.9%	3,845.1	3,987.4	3.7%
Quarterly Indicator of Tourism Activity* (index 2008=100, seasonally adjusted series) INEGI.**							Fourth Quarter		
Tourism GDP	Annual percentages	0.8	2.1	5.0	2.4	2.4	NA	NA	NA
Goods	Annual percentages	-4.3	-6.2	3.1	4.3	4.3	NA	NA	NA
Services	Annual percentages	2.2	3.7	5.4	3.2	3.2	NA	NA	NA
Internal tourism consumption	Annual percentages	1.4	0.9	6.1	4.8	4.8	NA	NA	NA
Domestic tourism consumption	Annual percentages	0.8	-1.8	3.2	1.2	1.2	NA	NA	NA
Inbound tourism consumption	Annual percentages	6.9	21.8	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. 14/07/2017

** 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.

NA Not apply

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

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MEXICO'S KEY ECONOMIC INDICATORS

KEY ECONOMIC INDICATORS OF MEXICO

Entries	2011	2012	2013	2014	2015	2016	2016.I	April 17	May 17
	General Economic Activity and Services Identified with Tourism								
Gross Domestic Product									
. Millions of current pesos	14,550,014	15,626,907	16,118,031	17,259,799	18,261,422	19,539,870	20,603,884.5		
. Constant prices annual variations in %	4.0	4.0	1.4	2.3	2.6	2.3	2.8		
Tertiary activities									
- Air Transportation (481)									
. Millions of current pesos	24,368	27,720	27,063	34,708	39,827	50,112	42,294.2		
. Constant prices annual variations in %	-0.3	7.3	8.1	9.4	7.7	16.5	8.4		
- Temporary Lodging Services (721)									
. Millions of current pesos	137,648	151,099	163,718	179,525	200,137	219,572	238,130.6		
. Constant prices annual variations in %	2.4	8.2	5.6	6.0	5.6	3.8	1.5		
- Food and Beverages Preparation Services (722)									
. Millions of current pesos	160,238	172,438	177,145	185,939	208,668	225,523	221,911.5		
. Constant prices annual variations in %	0.8	3.0	-1.7	-0.3	6.1	3.8	-0.6		
	Quarterly Indicators of Tourism Activity								
Tourism GDP									
. Annual variations in %	2.9	4.6	0.6	1.7	3.6	3.5			
Internal tourism consumption									
. Annual variations in %	1.8	2.9	0.9	0.9	4.5	5.9			
Domestic tourism consumption									
. Annual variations in %	2.9	2.3	1.0	-0.8	1.1	2.7			
Inbound tourism consumption									
. Annual variations in %	-6.2	7.8	0.5	14.7	28.8	24.0			
	Tourism Employment								
People Employed in the Tourism Sector (SECTUR)*	3409804.1	3536686.1	3628194.7	3640970.3	3803441.7	3951886.8	3987429.8		
	Total number of IMSS-Insure Workers								
Employees insured by IMSS (average of the period)	15,153,643	15,856,137	16,409,302	16,990,724	17,724,222	18,401,344	18,849,402	19,021,083	19,047,825
.Permanent	13,101,612	13,637,937	14,123,077	14,570,291	15,170,986	15,785,784	16,147,909	16,285,224	16,349,612
.Non-permanent (urban and field)	2,052,031	2,218,200	2,286,225	2,420,433	2,553,236	2,615,560	2,701,493	2,735,859	2,698,213
Unemployment National Rate ** (closing of the period)									
. Total Percentage of PEA	4.51	4.40	4.89	4.16	4.33	3.65	3.39	3.57	3.50
	Prices and Exchange Rate***								
National Price Index (closing of the period)									
Consumer (percent variation)	3.8%	3.6%	4.0%	4.1%	2.1%	3.4%	5.4%	5.82%	2.60%
. Air transport (percent variation)	7.6%	-7.7%	0.2%	16.7%	3.2%	9.8%	4.4%	17.92%	4.20%
. Hotel (percent variation)	6.4%	1.1%	3.1%	4.8%	4.2%	7.8%	6.1%	9.51%	4.99%
. Package Tourist Services (percent variation)	5.7%	1.6%	4.9%	5.1%	7.6%	6.4%	5.3%	18.50%	4.38%
. Restaurants (percent variation)	4.4%	4.2%	3.6%	6.0%	4.9%	5.5%	6.4%	6.15%	5.16%
Exchange Rate (peso / dollar)									
. Average of the period	12.423	13.169	12.772	13.292	15.848	18.664	19.407	18.758	18.786
	Business Cycle Indicators and Consumer Confidence (montly difference****)								
. Coincident Indicator	0.060	-0.064	-0.031	0.029	-0.029	0.034	-0.021	ND	ND
. Forward Indicator	0.027	0.094	0.006	-0.086	-0.077	-0.060	0.154	0.183	ND
.Confidence Consumer Index	0.113	0.072	-0.266	0.057	0.063	-0.045	0.059	0.232	0.286

N.D. Not available.

* For 2016 figures for the third quarter.

** For 2016 figures for the fourth quarter. The Tourist Employment dataset is smoothed by averaging the last four quarters of it. The objective is to eliminate irregular .fluctuations in the short and medium term.

*** Percentage of all the economically active population. Data at the end of the period for annual and monthly figures and average period for quarterly information.

**** For prices of the consumer: at the end of the year are annual variations and same month previos year is for monthly data variation.

***** Point monthly difference (closing of the period).

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

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	1.66	1.96	4.61	3.09
OCDE	1.94	1.97	5.34	3.79
Banco de México Survey	1.98	2.23	6.02	3.81
Ministry of the Treasury and Public Credit	1.3 a 2.3	2.0 a 3.0	4.90	3.00

Source: **IMF**, World Economic Outlook Database (april 2017); **OECD**, Economic Outlook (2017/06); **Bank of Mexico**, Expectations Survey Economic Specialist Private Sector (01/07/17); **Ministry of the Treasury and Public Credit**, Pre-General Criteria for Economic Policy 2018 (April, 2017)

ECONOMIC CONTEXT

International

The global recovery remains on track, with some changes in its composition. While the U.S. economy went through a soft patch early in the year, many European and Asian countries saw GDP expand faster than expected, supported by a cyclical upturn in global manufacturing and trade.

Emerging market financial conditions have remained broadly supportive of growth even as U.S. monetary policy has gradually tightened. At the same time, several emerging and advanced economies are still operating below capacity, and underlying core inflation is still low generally. All in all, the global outlook remains broadly similar to the April WEO.

National

The pace of economic activity is projected to pick up somewhat, mainly reflecting stronger exports. Improved business confidence will support the upturn in investment. Consumer spending, the engine of growth in the past two years, will grow at a slower pace, as rising inflation damps consumers' purchasing power and credit conditions tighten.

The Mexican economy has benefitted from open borders, foreign direct investment inflows and integration in global value chains. Remaining barriers to foreign investment and services trade should be lifted to move up in global value chains, increase the diversification of exports and strengthen geographical linkages. However, certain locations and categories of workers have benefitted less from open borders than others. Improving ed ucation outcomes and reducing informality would help to spread the benefits of globalisation more widely.

Source: http://www.oecd.org/eco/outlook/mexico-economic-forecast-summary.htm