

# Mexico

## Tourism in the economy

It is estimated that tourism contributes approximately 8.7% of the total GDP in Mexico. The sector provides 2.3 million fulltime jobs (5.9% of fulltime paid employment), rising to around 10 million jobs in total including informal employment. Tourism accounts for over 79.9% of exports in services. Overall, economic and employment growth in tourism has been faster than in the rest of the economy.

Mexico received 35 million international arrivals in 2016, a 9% increase over the previous year. It is estimated that this figure could reach 37.5 million in 2017. By far the largest source market is the United States, followed by Canada and Argentina. However, the general pattern has been towards greater market diversification, with arrivals from the United States reducing as a proportion of total arrivals over the past ten years, as a result of faster growth from Latin America and Asia. This is linked to the opening of new international air routes, including three new direct flights from Asia in 2017 (Seoul, Canton and Tokyo). In terms of domestic tourism, the number of Mexican nationals staying in hotels is estimated at around 91.5 million, with an annual growth rate of 2.8%.

## Tourism governance and funding

The Ministry of Tourism is the lead government body with responsibility for tourism policy, planning, development, quality and regulation.

The Mexico Tourist Board (CPTM) is responsible for promoting the tourism brand and for developing and coordinating international and national strategies for tourism marketing. CPTM aims to strengthen the image of Mexico as a tourist destination promoting the quality, diversity and authenticity of its attractions.

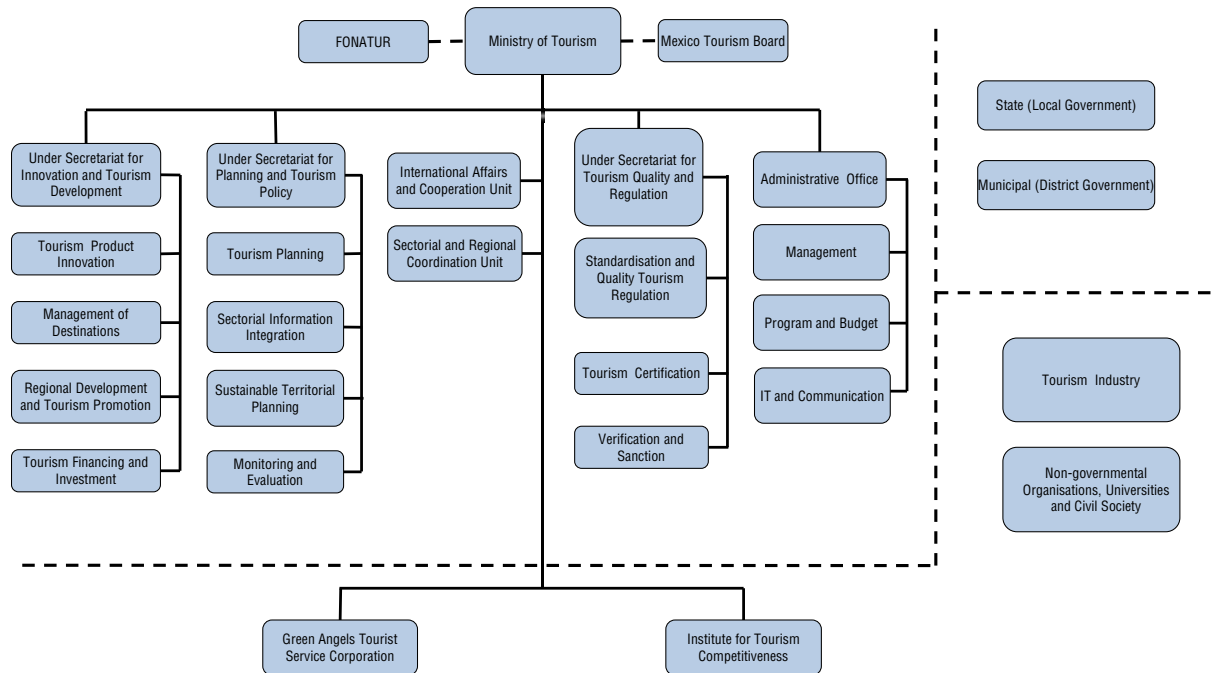
The National Fund for Tourism Development (FONATUR) acts as a facilitating instrument for foreign investors. It was created by the Ministry of Finance and is coordinated by the Ministry of Tourism. FONATUR's objectives are to promote investment, create jobs, improve social welfare and encourage national and regional development. It engages in the development of destinations and tourism products. FONATUR's functions include conducting feasibility studies, developing destination master plans, project management, executing infrastructure projects and engagement with various forms of financing.

State and local level bodies have the right to promote and finance their destinations and to collect room taxes. Coordination with the state and local levels of government is undertaken by several commissions, including the Governor's Commission for Tourism and the association of local ministers of tourism.

In 2017 the budget for tourism in Mexico amounted to USD 441 million. This figure consisted of around USD 219 million for the Ministry of Tourism, USD 188 million for

FONATUR and USD 34 million for the Mexico Tourist Board. The latter also obtains significant resources from an entry tax charged on tourists. Much of the funding for the tourism sector also occurs at the local level and from public and private initiatives.

### Mexico: Organisational chart of tourism bodies



Source: OECD, adapted from the Ministry of Tourism, 2018.

## Tourism policies and programmes

The overall National Development Plan 2013-2018 recognises the importance of tourism for creating jobs, developing markets for SMEs and preserving the natural and cultural richness of the country. Derived from this, the Tourism Sectoral Plan 2013-2018 has five objectives:

- Transform the tourism sector and strengthen collaboration schemes and joint responsibilities to tap the tourism potential,
- Strengthen the comparative advantages of the tourism offer,
- Facilitate financing and public-private investment in projects with tourism potential,
- Boost tourism promotion in order to contribute to the diversification of markets and increase development and growth of the sector,
- Promote sustainable development of tourism destinations and increase the social and economic benefits for the recipient communities.

The main challenges facing the tourism sector in Mexico include sustainability, a competitive business environment, connectivity, infrastructure and social responsibility. In this context, three policy priorities have been identified:

- Careful planning and regulation of urban growth and the use of natural resources and public services to meet the needs of tourism and of the local population,

- Establishing a model for tourism development in destinations that addresses the viability of tourism activity while strengthening local communities and involves all types of stakeholder (three levels of government, civil society, NGOs, academia and the private sector),
- Maximising the retention of wealth generated in the regions, minimising imports of goods and services and increasing employment for local people.

The Programme for Tourism Territorial Planning provides the basis for the responsible development of tourism destinations. A new programme, called Zones for Sustainable Tourism Development, is underway and seeks to implement destination plans, along with local governments, that address territorial, geographical, economic, social, cultural, educational and environmental issues. This program seeks to combine and incentivise with federal funding, an increase in state, municipal and private investments.

The Tourism Board has developed a program dedicated to the promotion of domestic tourism (which represents 85% of all tourism in Mexico), called “Let’s All Travel for Mexico” (*Viajemos Todos por México*), which encourages domestic travel, diversification of tourist products, and the reduction of seasonality.

The Board is involved in organising fairs and events to promote the tourism sector. An example of this is the *Tianguis Turístico*, an unique business forum in which national and international buyers meet with Mexican companies to develop business relationships. In addition they continue to improve and innovate the “Magical Towns” program, which has helped to diversify the market and encouraged regional development.

An advisory board has been created to help execute the strategic lines of action for medical tourism, including product, quality, investigation, integration, financing, facilitating and promotion. Currently 10 medical tourism clusters have been identified. The competitiveness of these clusters will be derived from their proximity to source markets, world class medicine and infrastructure, competitive pricing relative to other destinations, connectivity, public image and customer service.

An initiative has been introduced, together with the private sector, to develop the capacity of employees in the tourism sector and to improve their quality of life. It includes a programme for the construction of accommodation for employees, close to tourist centres, thereby reducing pollution and travel times.

A policy has been introduced to promote the application of new technology in the tourism sector, aimed particularly at analysing and facilitating visitor flows, mobility and interaction with service providers. It focuses on certain destinations such as Smart Cities and on visitor arrivals, through a Digital Borders initiative.

In response to the UN global initiative in 2017, an event was held in Acapulco at which state tourism authorities (subnational), representatives from the private sector, academia, environmental organisations and international non-governmental organisations, signed the National Commitment for Sustainable Tourism for Development. Two particular areas of action relating to this commitment include:

- Adjustment of legislation and development programmes relating tourism to the conservation of biodiversity and the environment, as outlined by the Conference on Biological Diversity (COP 13) held in Mexico in 2016.
- Commitment to actions in the National Code of Conduct for the Protection of Children and Adolescents in the Travel and Tourism Sector, as an instrument to support good employment practices and address social impacts.

## Statistical profile

Table 1. Mexico: Domestic, inbound and outbound tourism

	2012	2013	2014	2015	2016
<b>TOURISM FLOWS, THOUSAND</b>					
<b>Domestic tourism</b>					
Total domestic trips	..	..	..	..	..
Overnight visitors (tourists)	74 668	78 527	80 746	85 939	89 874 p
Same-day visitors (excursionists)	..	..	..	..	..
Nights in all types of accommodation	..	..	..	..	..
Hotels and similar establishments	126 933	129 356	143 035	143 754	150 445 p
Specialised establishments	..	..	..	..	..
Other collective establishments	..	..	..	..	..
Private accommodation	..	..	..	..	..
<b>Inbound tourism</b>					
Total international arrivals	76 749	78 100	81 042	87 129	94 853
Overnight visitors (tourists)	23 403	24 151	29 346	32 093	35 079
Same-day visitors (excursionists)	53 346	53 950	51 696	55 035	59 774
<b>Top markets</b>					
United States	18 658	18 940	23 399	24 094	24 261
Canada	1 572	1 599	1 677	1 749	1 781
United Kingdom	363	414	459	506	545
Spain	279	282	310	333	361
France	203	200	214	222	234
Nights in all types of accommodation	..	..	..	..	..
Hotels and similar establishments	57 527	63 765	70 718	82 654	86 616 p
Specialised establishments	..	..	..	..	..
Other collective establishments	..	..	..	..	..
Private accommodation	..	..	..	..	..
<b>Outbound tourism</b>					
Total international departures	87 493	90 787	90 982	94 988	97 372
Overnight visitors (tourists)	15 581	15 911	18 261	19 603	20 223
Same-day visitors (excursionists)	71 913	74 875	72 721	75 385	77 149
<b>Top destinations</b>					
..	..	..	..	..	..
..	..	..	..	..	..
..	..	..	..	..	..
..	..	..	..	..	..
..	..	..	..	..	..
<b>TOURISM RECEIPTS AND EXPENDITURE, MILLION USD</b>					
<b>Inbound tourism</b>					
Total international receipts	13 320	14 311	16 607	18 728	20 540
International travel receipts	12 739	13 949	16 208	17 734	19 571
International passenger transport receipts	581	362	399	995	969
<b>Outbound tourism</b>					
Total international expenditure	10 734	11 970	12 556	12 668	12 749
International travel expenditure	8 449	9 122	9 606	10 098	10 227
International passenger transport expenditure	2 286	2 848	2 950	2 570	2 522

.. Not available; p Provisional data

Source: OECD Tourism Statistics (Database).



StatLink  <http://dx.doi.org/10.1787/888933640728>

Table 2. **Mexico: Enterprises and employment in tourism**

	Number of establishments	Number of persons employed				
	2016	2012	2013	2014	2015	2016
<b>Total</b>	..	<b>2 131 440</b>	<b>2 153 084 p</b>	<b>2 180 896 p</b>	<b>2 229 801 p</b>	<b>2 271 112 p</b>
<b>Tourism industries</b>	<b>104 848 p</b>	<b>1 498 625</b>	<b>1 521 294 p</b>	<b>1 546 054 p</b>	<b>1 592 052 p</b>	<b>1 627 250 p</b>
Accommodation services for visitors	..	179 045	182 832 p	188 920 p	198 140 p	203 846 p
Hotels and similar establishments	21 085 p	..	..	..	..	..
Food and beverage serving industry	76 785 p	609 733	620 109 p	619 663 p	639 360 p	658 096 p
Passenger transport	..	518 965	524 890 p	540 357 p	555 270 p	566 670 p
Air passenger transport	..	..	..	..	..	..
Railways passenger transport	..	..	..	..	..	..
Road passenger transport	..	..	..	..	..	..
Water passenger transport	..	..	..	..	..	..
Passenger transport supporting services	..	..	..	..	..	..
Transport equipment rental	..	..	..	..	..	..
Travel agencies and other reservation services industry	6 978 p	19 192	19 373 p	20 018 p	20 381 p	20 648 p
Cultural industry	..	42 286	38 416 p	42 702 p	43 702 p	44 031 p
Sports and recreation industry	..	56 185	57 191 p	56 512 p	55 646 p	56 110 p
Retail trade of country-specific tourism characteristic goods	..	73 219	78 483 p	77 882 p	79 553 p	77 849 p
Other country-specific tourism industries	..	..	..	..	..	..
<b>Other industries</b>	..	<b>632 815</b>	<b>631 790 p</b>	<b>634 842 p</b>	<b>637 749 p</b>	<b>643 862 p</b>

.. Not available; p Provisional data

Source: OECD Tourism Statistics (Database).


StatLink  <http://dx.doi.org/10.1787/888933640747>Table 3. **Mexico: Internal tourism consumption**

Million MXN

	2016		
	Domestic tourism expenditure	Inbound tourism expenditure	Internal tourism consumption
<b>Total</b>	..	..	..
<b>Consumption products</b>	<b>2 156 993 p</b>	<b>462 813 p</b>	<b>2 619 806 p</b>
Tourism characteristic products	1 951 601 p	461 562 p	2 413 163 p
Accommodation services for visitors	469 495 p	124 209 p	593 705 p
Food and beverage serving services	423 299 p	114 856 p	538 155 p
Passenger transport services	617 359 p	79 890 p	697 249 p
Air passenger transport services	..	..	..
Railways passenger transport services	..	..	..
Road passenger transport services	..	..	..
Water passenger transport services	..	..	..
Passenger transport supporting services	..	..	..
Transport equipment rental services	..	..	..
Travel agencies and other reservation services industry	25 904 p	780 p	26 684 p
Cultural services	9 749 p	16 074 p	25 822 p
Sports and recreation services	13 262 p	31 469 p	44 732 p
Country-specific tourism characteristic goods	392 534 p	94 283 p	486 816 p
Country-specific tourism characteristic services	..	..	..
Other consumption products	205 392 p	1 251 p	206 643 p
Tourism connected products	..	..	..
Non-tourism related consumption products	..	..	..
<b>Non-consumption products</b>	..	..	..

.. Not available; p Provisional data

Source: OECD Tourism Statistics (Database).

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