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Mexico



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Mexico

Tourism in the economy

Tourism is a national priority in Mexico as it generates direct and indirect jobs, as well as foreign currency receipts and economic growth. Tourism also promotes regional development and productive chains, in addition to improving quality of life for families and communities. It contributes 8.4% of Mexico's GDP, is the fourth largest source of export revenues, and creates around 2.5 million direct and 5 million indirect jobs.

Domestic tourism represents more than 80% of tourism in the country, mostly generated in regions/municipalities that do not receive important international flows.

Mexico has a diversity of tourism products, offering more than 40 000 archaeological sites (almost 200 of which are open to the public); 62 ethnic groups; 38 World Heritage Sites; 83 *Pueblos Mágicos* (Magical Towns); 10 *Rutas de México* (recognised tourist routes); 14 AAA – 5 diamond hotels and 637 000 hotel rooms; 50 world-class golf courses; the world's leading port in cruise ship arrivals (Cozumel); and world-class facilities for meetings and conventions. Mexico's gastronomy and *mariachi* were named Intangible Cultural Heritage of Humanity by UNESCO.

During 2012, Mexico received 23.4 million tourists, placing it in 13th position in the international tourist arrivals ranking published by UNWTO. In the same year, Mexico generated USD 12.7 billion in international tourism receipts.

Tourism organisation and governance

The Ministry of Tourism, cabinet position within the federal government, designs, develops, co-ordinates and implements tourism policy. Specific policy details are set out by each administration, which in Mexico changes every six years following presidential elections. During the first semester of every new administration, a National Development Plan and individual plans for economic sectors such as tourism are set out by the executive.

The Ministry's vision is to make Mexico a world leader in tourism by 2030. To achieve this, the strategy of the federal government is to: recognise tourism as key to economic development; encourage tourism businesses to be competitive both nationally and internationally; develop tourism that respects the natural, cultural and social environments; diversify tourism products; and develop new markets.

Its mission is to develop tourism by planning and stimulating the sector, providing operational support, and promoting tourism services in co-ordination with the different bodies and levels of government. For this purpose, the President created and chairs the Federal Tourism Cabinet, a body that includes ministers and sectoral stakeholders, in order to incorporate the views of the public and private sectors for the implementation of the national tourism policy.

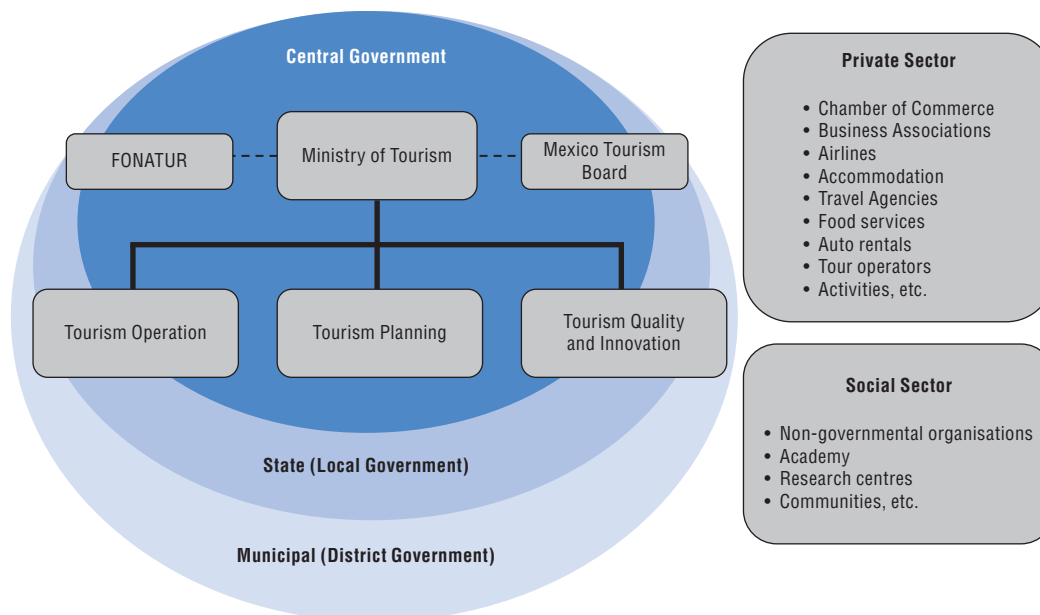
The Tourism Cabinet articulates plans, actions and budgets of federal agencies to achieve the objectives of the National Tourism Policy, through specific working groups in order to streamline, rationalise and optimise the use of public resources for the benefit of the tourism sector. It serves as an instrument for public policy planning and as a co-ordination mechanism for the government to increase management capability, and to facilitate the implementation of tourism sector priorities.

The General Tourism Law (2009) establishes the basis for co-ordination between federal, state and local authorities, and defines the main roles and responsibilities for each level of government. It also states that the ministry is to register all tourism service providers, organise and publish tourism-related statistics, and conclude international agreements to promote foreign investment for tourism in Mexico.

The basic organisational structure of the Ministry of Tourism of Mexico (Figure 1) is as follows:

- The Office of the Minister, which is responsible for leading and consolidating national tourism development by planning activities, supporting the development of supply and operation of tourism services, and for advocacy to meet the priorities established in the National Development Plan. The head of the ministry (the Secretary), interacts and co-ordinates actions with the National Trust Fund for Tourism Development (FONATUR) and the Mexico Tourism Board, to promote tourism investment and products, in order to increase flows and expenditure.
- FONATUR identifies potential large-scale tourism development projects, assists and supports state governments in the planning of local projects, participates in the construction of basic infrastructure in tourism destinations, and is responsible for attracting private investment to them.

Figure 1. **Mexico: Organisational chart of tourism bodies**



Source: OECD, adapted from the Ministry of Tourism, 2014.

- The Mexico Tourism Board develops and executes strategies to promote tourism to and from Mexico at national and international level, and maintains offices in major source markets for promotional purposes.
- The Undersecretariat for Tourism Planning is responsible for designing public policies and programmes, and, in co-ordination with state and municipal governments, for identifying priority projects for the development and promotion of tourism.
- The Undersecretariat of Tourism Operation encourages the development, operation and evaluation of programmes and tourist services that enable competitive and sustainable tourism development contributing to job creation, the preservation of the natural and historic heritage, and the generation of foreign exchange earnings.
- The Secretariat for Quality and Innovation is responsible for establishing mechanisms and institutions to provide the human, financial and material resources necessary for quality tourism. It also provides computer services, organisational support and co-ordinating services for their operation, and encourages the development of innovative measures of quality and efficiency.

Tourism budgets

In 2012, the total budget of the Ministry of Tourism was MXN 7 744 million (approximately USD 587 million). The Mexico Tourism Board received MXN 2 246 million (USD 170 million) and FONATUR's budget was MXN 3 646.1 million (USD 276 million).

Tourism-related policies and programmes

The goal of the new National Tourism Policy (NTP) is to help Mexico become a world-class destination. It is based on four principles:

- *Planning and sectoral transformation*: the NTP will be followed by the various levels of government, and in the actions and budgets of federal agencies involved in the sector. The agenda of tourism-related work across all government departments will be co-ordinated by the new Federal Tourism Cabinet.
- *Innovation and competitiveness*: the country needs to work on diversifying its tourism offer as well as on strengthening destinations that are already recognised worldwide.
- *Development and promotion*: the state must assume its responsibility in planning, developing and promoting destinations, thus acting as a proactive agent, driver and facilitator of private efforts.
- *Sustainability and social benefit*: the government will create tools that will help Mexico's tourism industry preserve natural resources, heritage, history and culture. Programmes will also be developed to make tourism more accessible to all sectors of the population.

In accordance with the National Development Plan 2007-12, the government is running several programmes to support sustainability:

- *Environmental Quality Tourism*: delivers a certification system for tourism service providers who have demonstrated compliance with environmental legislation and self-regulation policies.
- *Clean Tourism Destination*: an initiative that encourages municipalities to ensure that high standards of water and solid waste management are integrated into the tourism services offered in the destination.

- *Special Programme for Climate Change*: the main objectives are to establish a sectorial fund in co-ordination with the National Council of Science and Technology, which is financing two research projects in this field; to develop a Programme of Certification; and to recognise the best environmental practices in tourism logistics and facilities.
- *Sustainable Tourism Certificate*: this programme is run jointly with the Office of the Attorney General for Environmental Protection, pursuing full compliance with environmental regulations and the implementation of best practice.

The Ministry of Tourism participates in several international forums to enhance trade in tourism. Mexico is a member of several international tourism organisations and forums, including UNWTO, APEC, OAS and the OECD.

The government intends to improve the tourism sector's competitiveness by a combination of sectoral planning and co-ordinated strategic policies, with up-to-date statistical information provided to inform the policies, programmes and projects.

By way of example, the Centre for Advanced Studies in Tourism, with a decentralised structure, is a centre of knowledge aimed at improving the competitiveness of the tourism sector through studies, research and publications. It promotes academic research and the dissemination of strategic information, technical resources and the transfer of technology to improve tourism management and policy.

"Angeles Verdes" (Green Angels) is a decentralised corporation responsible for designing policies and strategies for providing information, support and assistance for the safety of tourists, which will strengthen the image of the country as a safe and attractive tourism destination for domestic and foreign visitors.

A "Tourism orientation and mechanical assistance" programme is intended to provide visitors with proper information and emergency services. To accomplish this, radio patrols will receive maintenance and fuel, and tourists will be able to make reservations at service stations or obtain information and advice by phone.

The government will contribute to increasing tourism activity through promotion and advertising campaigns, fairs and events that publicise the national attractions and services, and familiarisation trips in collaboration with the tourism industry and national destinations.

The "Live it to believe it" campaign is based on information about visitors' experiences and opinions, showing how they enjoyed Mexico, in order to present and promote Mexico as potential visitors want to see it.

The "Development and improvement of infrastructure to foster and promote investments in the tourism sector" programme aims to increase the diversity, productivity and competitiveness of the national tourism offer through Integrally Planned Centres (CIP). These will be implemented by the: development, construction and equipping of urban infrastructure for the projects and programmes of FONATUR; formalising the legal instruments that allow tourism planning studies for states and municipalities; selling land reserves; generating marketing, technical and financial support elements that help tourism enterprises to undertake investment projects and determine their risk levels; and identifying the territorial areas with potential to become tourism destinations.

The "Generation of actions for the development of products" programme aims to increase the competitiveness of the national tourism industry by developing tourism, cultural, gastronomic, meetings, health and nautical products and infrastructure all over the country, so as to diversify and consolidate the offer for both domestic and foreign tourists.

An “Ecotourism and rural tourism” programme aims to increase demand for nature tourism by developing and promoting natural, sustainable and competitive products, supported by specialised courses, evaluations and investments in infrastructure and equipment.

The *Rutas de México* programme presents ten tourist routes that enable travellers to enjoy Mexico’s natural, architectural, historical and cultural inheritance and richness. The ten routes together cover all 32 states of the country and include special interest destinations. Each route suggests a different travel experience, such as gastronomy, ecotourism, adventure, extreme sports, folk art, beach destinations, historical and archaeological sites.

Statistical profile

Table 1. **Mexico: Domestic tourism**

	Unit	2008	2009	2010	2011	2012
Total domestic trips		..	..	..	..	..
Overnight visitors (tourists)		..	..	..	..	..
Same-day visitors (excursionists)		..	..	..	..	..
<i>Trips by main purpose of visit</i>						
Business and professional		..	..	..	..	..
Holiday, leisure and recreation		..	..	..	..	..
Nights in all means of accommodation	Thousand	78 498	73 514	79 187	84 296	93 531 p
Hotels and similar establishments		..	..	..	..	..
Other collective establishments		..	..	..	..	..
Domestic travel receipts		..	..	..	..	..

Source: Ministry of Tourism.


StatLink  <http://dx.doi.org/10.1787/888932988145>

Table 2. **Mexico: Inbound tourism**

	Unit	2008	2009	2010	2011	2012
Total international arrivals	Thousand	92 948	88 044	81 953	75 732	76 749 p
Overnight visitors (tourists)	Thousand	22 931	22 346	23 290	23 403	23 403 p
Same-day visitors (excursionists)	Thousand	70 017	65 698	58 664	52 329	53 346 p
<i>Top markets</i>						
United States	Thousand	18 241	18 517	18 993	18 956	18 658 p
Canada	Thousand	1 135	1 222	1 460	1 563	1 572 p
United Kingdom	Thousand	311	257	296	330	363 p
Spain	Thousand	285	216	287	280	279 p
France	Thousand	208	164	170	187	203 p
Nights in all means of accommodation	Thousand	52 746	42 904	48 152	49 064	52 936 p
Hotels and similar establishments		..	..	..	..	..
Other collective establishments		..	..	..	..	..
Total international receipts	Million MXN	163 893	169 485	159 819	152 431	172 612 p
International travel receipts	Million MXN	148 801	155 576	151 527	147 450	167 771 p
International passenger transport receipts	Million MXN	15 093	13 909	8 292	4 980	4 841 p

Source: Ministry of Tourism, National Bank.



StatLink  <http://dx.doi.org/10.1787/888932988164>

Table 3. **Mexico: Outbound tourism**

	Unit	2008	2009	2010	2011	2012
Total international departures		..	..	..	..	..
Overnight visitors (tourists)	Thousand	14 527	14 104	14 334	14 799	15 581 p
Same-day visitors (excursionists)		..	..	..	..	..
Total international expenditure	Million MXN	114 030	118 076	114 202	120 930	139 561 p
International travel expenditure	Million MXN	95 356	97 396	91 673	97 299	111 265 p
International passenger transport expenditure	Million MXN	18 674	20 680	22 529	23 631	28 296 p

Source: Ministry of Tourism, National Bank.

StatLink  <http://dx.doi.org/10.1787/888932988183>Table 4. **Mexico: Enterprises in tourism**

Number of establishments

	2008	2009	2010	2011	2012
Total tourism enterprises
Tourism industries
Accommodation services for visitors	15 754	16 231	16 875	17 294	17 669 p
Hotels and similar establishments
Food and beverage serving industry	33 588	34 532	36 092	37 658	39 302 p
Passenger transport
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	6 549	7 238	7 278	8 556	8 910 p
Cultural industry
Sports and recreation industry
Retail trade of country-specific tourism characteristic goods
Other country-specific tourism industries
Other industries

Source: Ministry of Tourism.


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Table 5. Mexico: Employment in tourism
Number of jobs

	2008	2009	2010	2011	2012
Total tourism employment (direct)	2 454 081	2 456 244	2 475 409	2 474 162 p	..
Tourism industries	..	..	..	..	..
Accommodation services for visitors	185 969	173 024	182 786	177 896 p	..
Hotels and similar establishments	..	..	..	..	..
Food and beverage serving industry	890 578	903 927	899 748	893 219 p	..
Passenger transport	452 534	445 901	448 745	450 456 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	16 847	15 693	15 602	15 853 p	..
Cultural industry	..	..	..	..	..
Sports and recreation industry ¹	22 851	22 760	22 271	21 622 p	..
Retail trade of country-specific tourism characteristic goods	278 049	256 391	265 068	268 648 p	..
Other country-specific tourism industries	..	..	..	..	..
Other industries ²	607 253	638 548	641 189	646 468 p	..
<i>Gender breakdown</i>					
Male (% of total tourism employment)	..	..	..	..	..
Female (% of total tourism employment)	..	..	..	..	..

Note: Average number of paid jobs.

1. Includes cultural services and entertainment activities.

2. Other services.

Source: Tourism Satellite Account.


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Table 6. Mexico: Internal tourism consumption
Million MXN, 2011

	Domestic tourism consumption	Inbound tourism consumption	Internal tourism consumption
Total	1 421 957 p	185 105 p	1 607 062 p
Consumption products	..	..	..
Tourism characteristic products	..	..	..
Accommodation services for visitors	171 125 p	22 514 p	193 640 p
Food and beverage serving services	114 824 p	53 639 p	168 463 p
Passenger transport services	444 939 p	21 052 p	465 991 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 ¹	15 598 p	3 528 p	19 126 p
Cultural services	..	..	..
Sports and recreation services ²	7 221 p	5 900 p	13 121 p
Country-specific tourism characteristic goods	..	..	..
Country-specific tourism characteristic services	..	..	..
Other consumption products	668 250 p	78 471 p	746 721 p
Tourism connected products	..	..	..
Non-tourism related consumption products	..	..	..
Non-consumption products	..	..	..

1. Includes tour operators and tourist guide services.

2. Includes cultural services and entertainment activities.

Source: Tourism Satellite Account.


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Table 7. **Mexico: Key economic indicators**

Percentage

	2008	2009	2010	2011	2012
Tourism GDP (direct) as % of total GDP	..	..	..	..	..
Total tourism employment (direct) as % of total employment	6.7	7.0	7.0	6.8 p	..

Source: Tourism Satellite Account.

StatLink  <http://dx.doi.org/10.1787/888932988259>**For more information**

Ministry of Tourism	www.sectur.gob.mx
Mexico National Tourist Office	www.visitmexico.com
National Institute of Statistical and Geographical Information	www.inegi.org.mx
Rutas de Mexico	www.visitmexico.com
Pueblos Magicos	www.visitmexico.com/es/pueblosmagicos
Mexico Tourism Board	www.cptm.com.mx