

# Results of Tourism Activity

Mexico, June 2016



Jardín en Hacienda San Gabriel, Morelos.



Cascada Cola de Caballo, Nuevo León.



Saltillo, Coahuila.



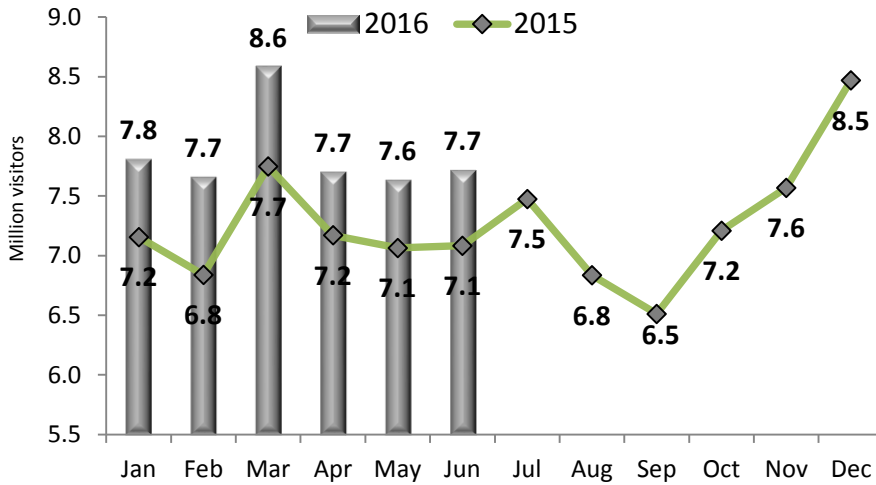
Zócalo de Campeche.

Undersecretariat of Planning and  
Tourism Policy

## International visitors

**Chart 1.** Bank of Mexico reported that the arrival of international travelers in the first half of 2016 was 47.0 million, which represents an increase of 9.4%. In June 2016, 7.7 million travelers arrived, 8.9% more than the number registered in the same month last year (7.1 million travelers). This is the highest level for June since 2010.

**Chart 1. Monthly Arrival of International Visitors**



January-June	Million visitors	Change %
<b>2015</b>	<b>43.1</b>	
<b>2016</b>	<b>47.0</b>	<b>9.4%</b>

\* NOTE: In the charts, the sum of monthly data may not correspond to the cumulative period, due to rounding .

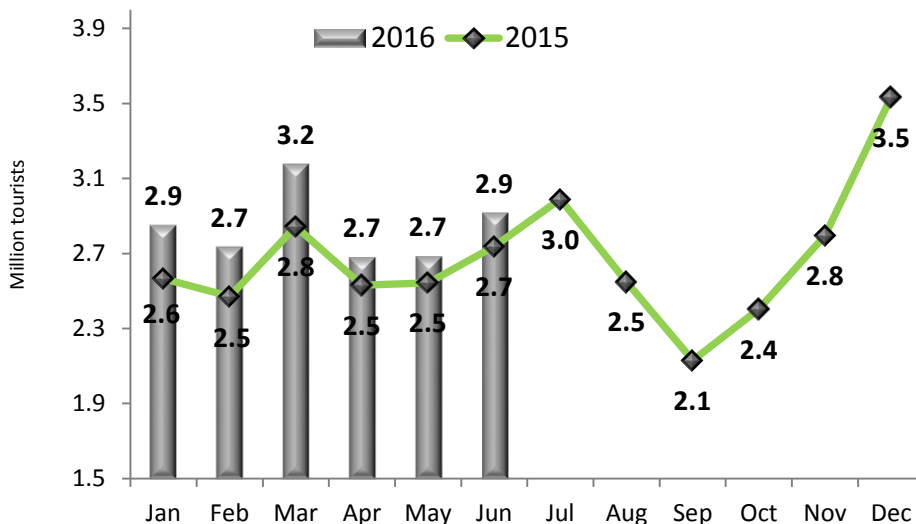
Source: Balance of payments, Banco de México.

<http://www.datatur.sectur.gob.mx/SitePages/VisitantesInternacionales.aspx>

## International tourists

**Chart 2.** The arrival of international tourists in the first half of 2016 was 17.0 million, an increase of 8.6%. In June 2016, international tourists arrivals reached 2.9 million, which represents an annual increase of 6.6%. This is the highest number for June since 2010.

**Chart 2. Monthly Arrival of International Tourists**



January-June	Million tourists	Change %
<b>2015</b>	<b>15.7</b>	
<b>2016</b>	<b>17.0</b>	<b>8.6%</b>

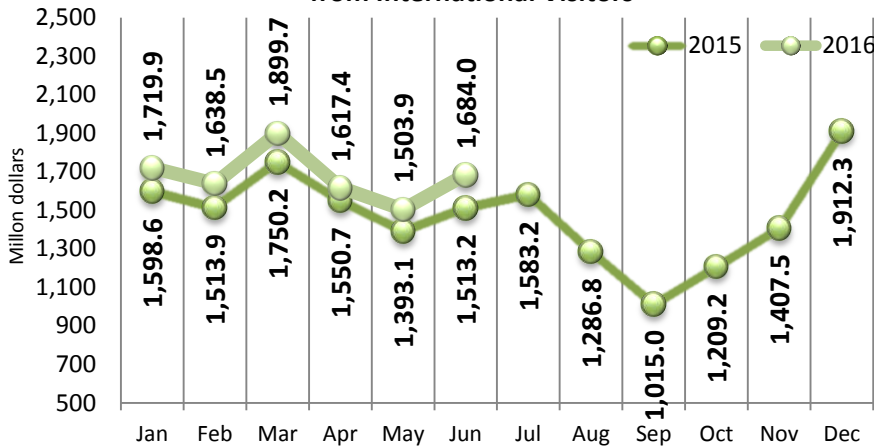
Source: Balance of payments, Banco de México.

<http://www.datatur.sectur.gob.mx/SitePages/VisitantesInternacionales.aspx>

## Foreign Currency Income by International visitors

**Chart 3.** The income of foreign exchange from international visitors for the first half of 2016 was 10,063 million, an increase of 743 million dollars compared to January-June of 2015, an increase of 8.0%. The figure recorded by Banxico is the largest for the month of June since 2010.

**Chart 3. Monthly Income of Foreign Currency to Mexico from International Visitors**



January-June	Million dollars	Change %
2015	9,320	
2016	10,063	8.0%

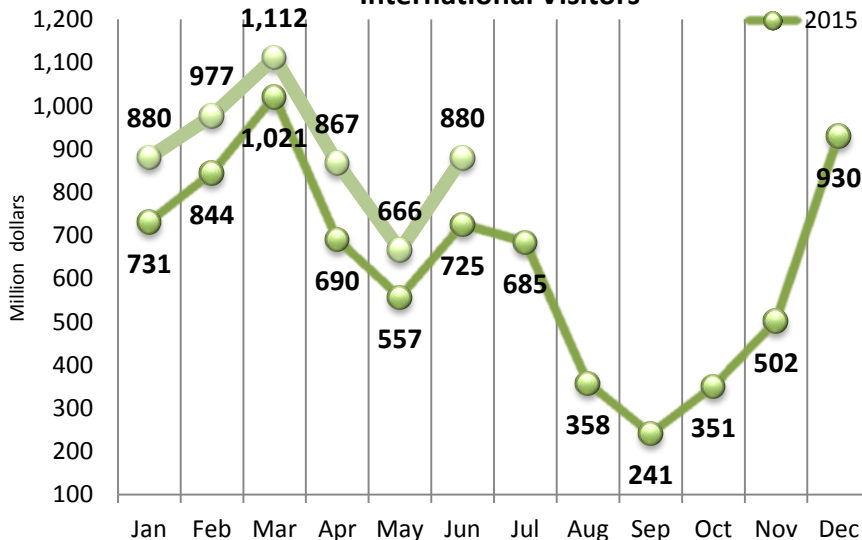
Source: Balance of payments, Banco de México.

<http://www.datatur.sectur.gob.mx/SitePages/VisitantesInternacionales.aspx>

## Tourism Balance by International visitors

**Chart 4.** The balance of international visitors in the first half of 2016 recorded 5,382 million, an amount 17.8% above of the observed in the same period of 2015. The balance is composed of the foreign exchange earnings of international travelers minus total spending of national travelers abroad.

**Chart 4. Monthly Result of Tourism Balance from International Visitors**



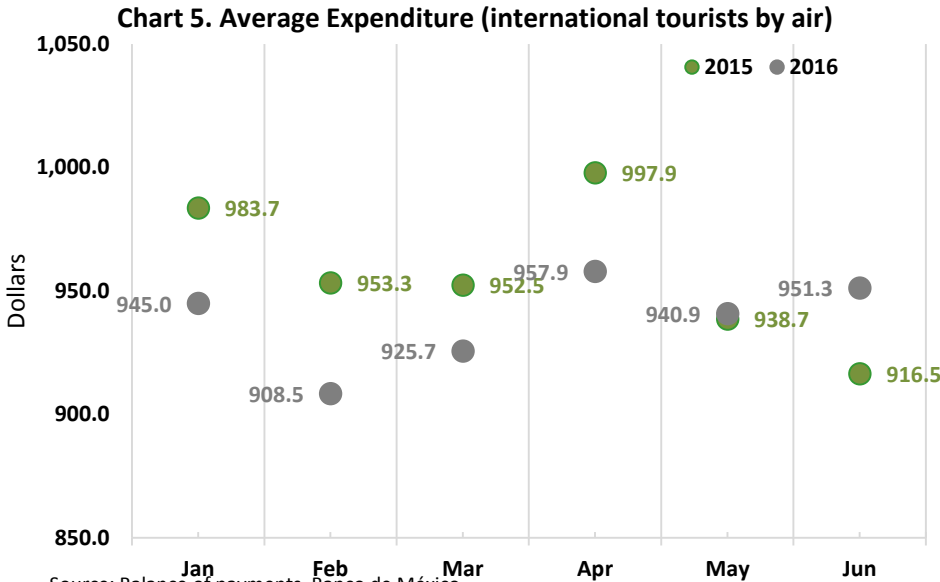
January-June	Million dollars	Change %
2015	4,568	
2016	5,382	17.8%

Source: Balance of payments, Banco de México.

<http://www.datatur.sectur.gob.mx/SitePages/VisitantesInternacionales.aspx>

## Average Expenditure of International tourists by air

**Chart 5.** The average monthly expenditure of international tourists by air was 937.6 dollars during January-June 2016, a reduction of 19.5 dollars (-2.0%) compared to January-June 2015. Among the factors explaining this evolution are: the appreciation of the dollar against the Mexican peso.



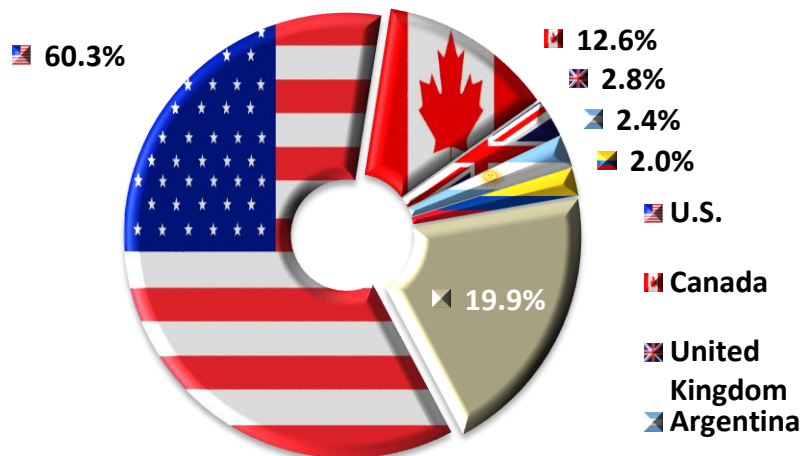
January-June	Dollars	Change %
2015	957.1	
2016	937.6	-2.0%

Source: Balance of payments, Banco de México.  
<http://www.datatur.sectur.gob.mx/SitePages/VisitantesInternacionales.aspx>

## Foreign Visitors by air (main countries of residence)

**Chart 6.** In January-June of 2016, the arrival of foreign air-coming visitors who reside in the **United States**, accounted for **60.3%**.

From Latin America and the Caribbean, the country of residence with the highest number of foreign arrivals into México was **Argentina** with **2.4%** of total.



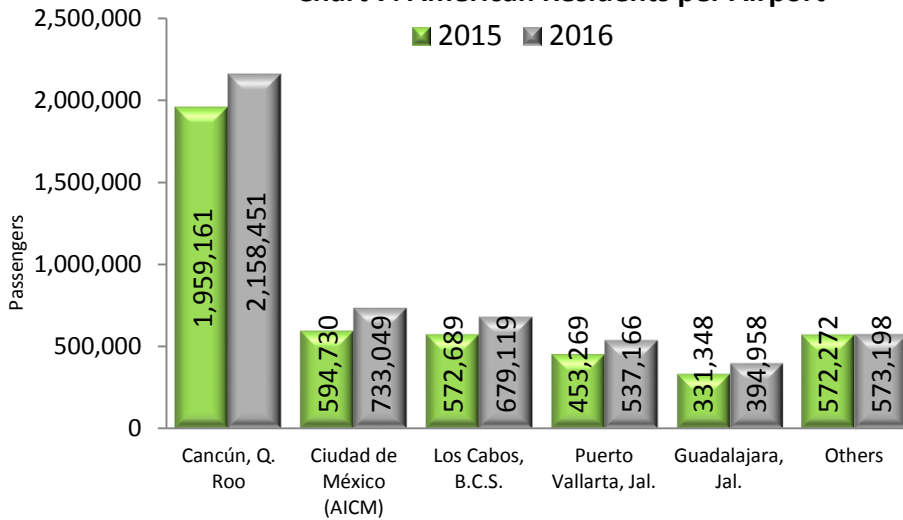
Note: Figures refers to events because the same person may have entered the country in more than one occasion. "Other" includes the remaining countries, the "unspecified" and the "Foreigners with residence in Mexico".

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

## Foreign passengers arriving by Air (American)

**Chart 7.** American residents who arrived by air to Mexico increased 13.2% in January-June of 2016 in comparison to the same period 2015, reaching 5.1 million passengers who arrived mainly by Cancun Airport, followed by Mexico City Airport.

**Chart 7. American Residents per Airport**



January-June	Passengers	Change %
2015	4,483,469	
2016	5,075,941	13.2%

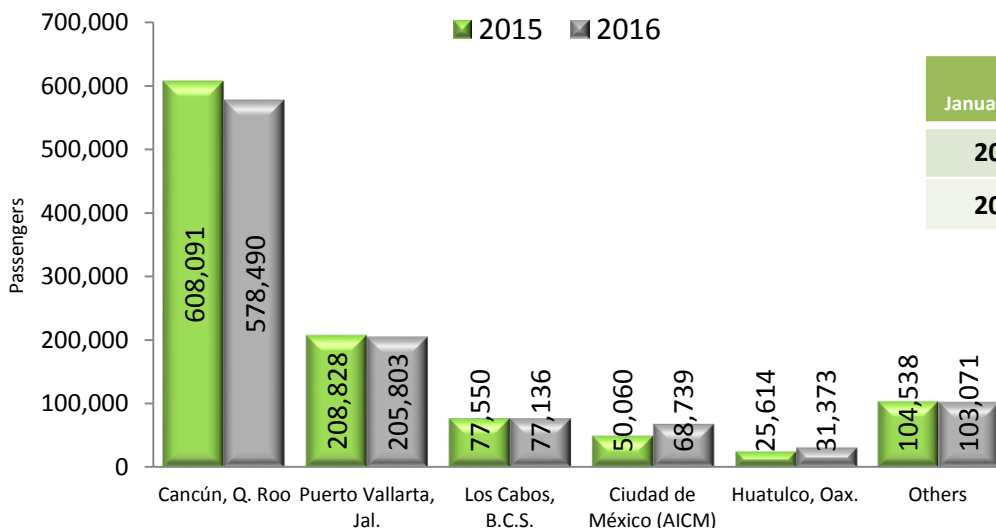
Source: Migration Policy Unit, SEGOB.

<http://www.datatur.sectur.gob.mx/SitePages/Visitantes%20Por%20Nacionalidad.aspx>

## Foreign passengers arriving by Air (Canadian)

**Chart 8.** Canadian residents who arrived by air to México were 0.9% lower during January-June of 2016 in comparison with the same period of 2015, reaching 1,064,612 passengers who arrived mainly by Cancun Airport, followed by Puerto Vallarta Airport.

**Chart 8. Canadian Residents per Airport**



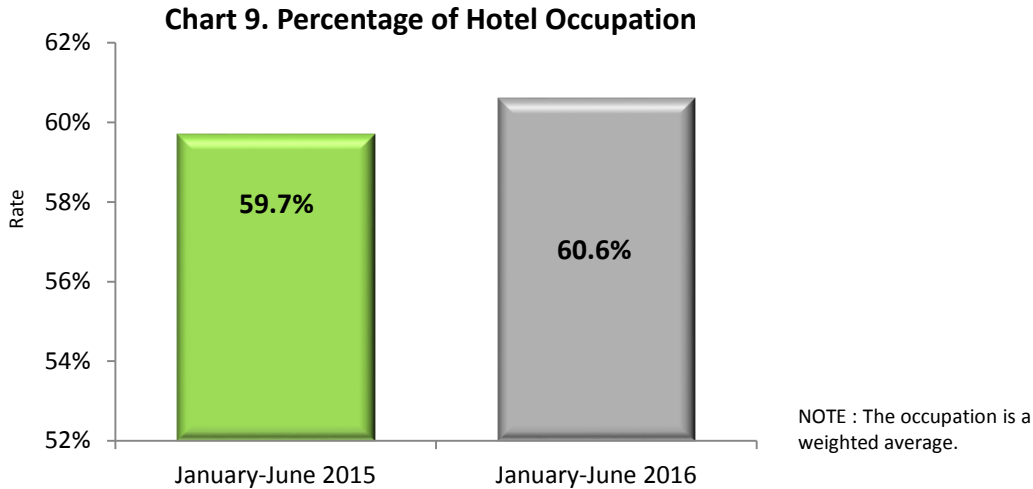
January-June	Passengers	Change %
2015	1,074,681	
2016	1,064,612	-0.9%

Source: Migration Policy Unit, SEGOB.

<http://www.datatur.sectur.gob.mx/SitePages/Visitantes%20Por%20Nacionalidad.aspx>

## Percentage of Hotel Occupation

**Chart 9.** The percentage of hotel occupation of a group of 70 resorts in the six-month period of 2016 was 60.6%, 0.9 percentage points higher in comparison to the same period last year.

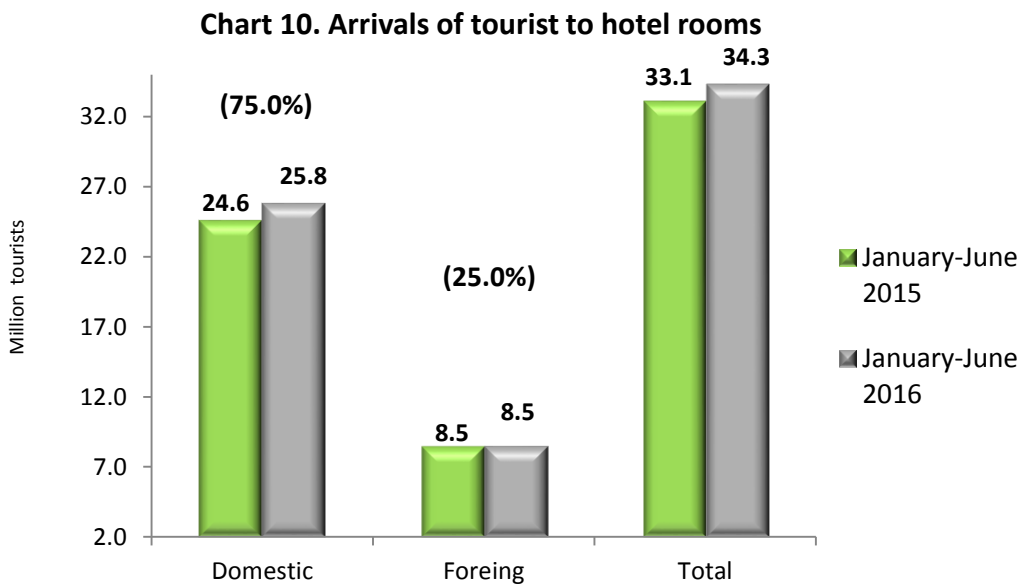


Source: Information of 70 resorts monitored by the Mexico's Tourism Information Statistics National System, DataTur.

<http://www.datatur.sectur.gob.mx/SitePages/ActividadHotelera.aspx>

## Arrival of tourists to Hotels

**Chart 10.** During January-June of 2016, the arrival of domestic tourists to hotel rooms was over 25.8 million tourists (75.0%), the remaining arrivals (25.0%) correspond to foreign tourists.



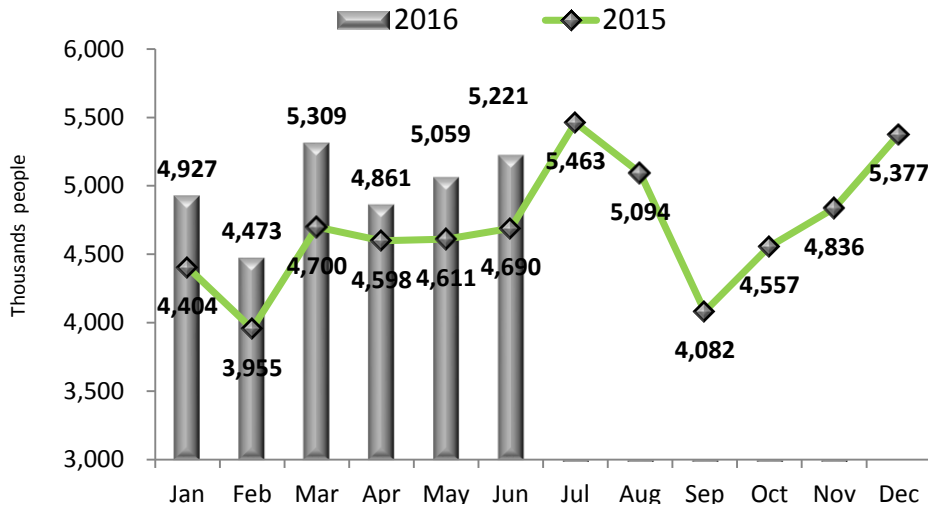
Source: Information of 70 resorts monitored by the Mexico's Tourism Information Statistics National System, DataTur.

<http://www.datatur.sectur.gob.mx/SitePages/ActividadHotelera.aspx>

## Air Transportation

**Chart 11.** The number of passengers arriving by air during January-June of 2016 was 29.8 million passengers, representing two million 892 thousand passengers additional (10.7%) in comparison to the same period last year.

**Chart 11. Total Passengers**

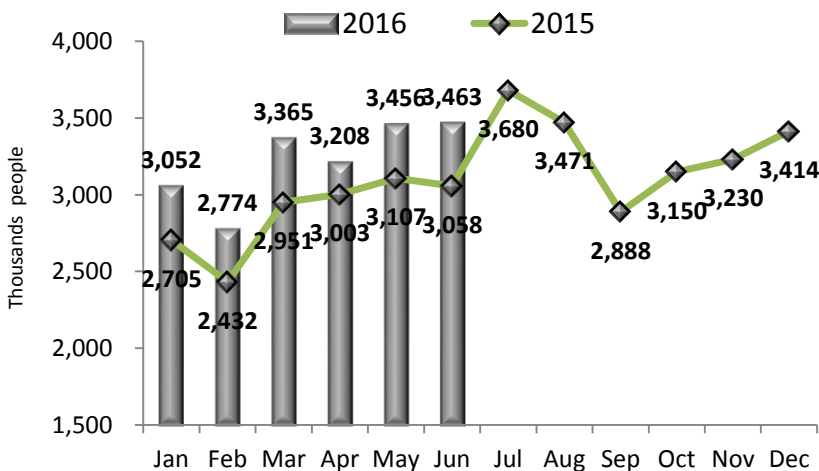


January-June	Million passengers	Change %
2015	26.9	
2016	29.8	10.7%

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

**Chart 12.** The number of passengers arriving by air on domestic flights during January-June of 2016 was 19.3 million passengers, representing 2.1 millions of additional passengers (12.0%), in comparison to the same period of the last year.

**Chart 12. Passengers in Domestic Flights**

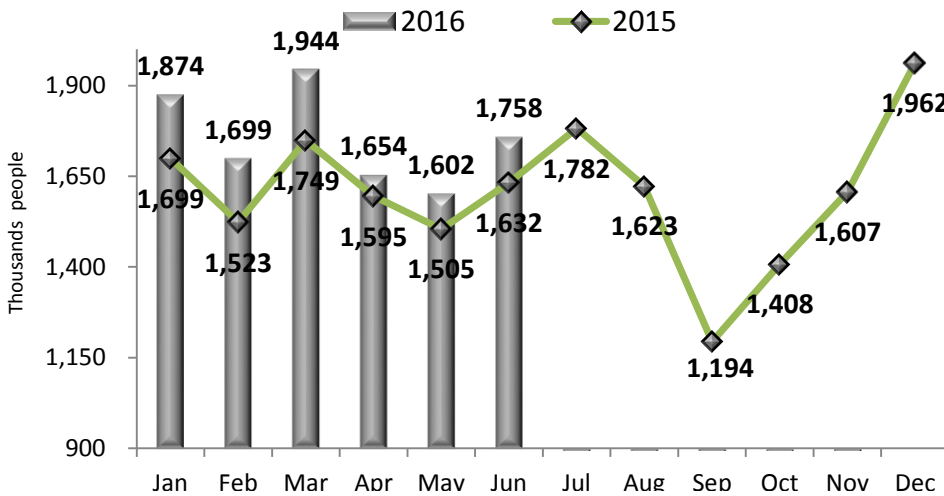


January-June	Million passengers	Change %
2015	17.2	
2016	19.3	12.0%

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

**Chart 13.** In January-June of 2016, the number of passengers arriving by air on international flights increased 8.5%, with 10.5 million passengers, exceeding for 828.9 thousands passengers the amount of January-June of 2015.

**Chart 13. Passengers on International Flights**



January-June	Million passengers	Change %
2015	9.7	
2016	10.5	8.5%

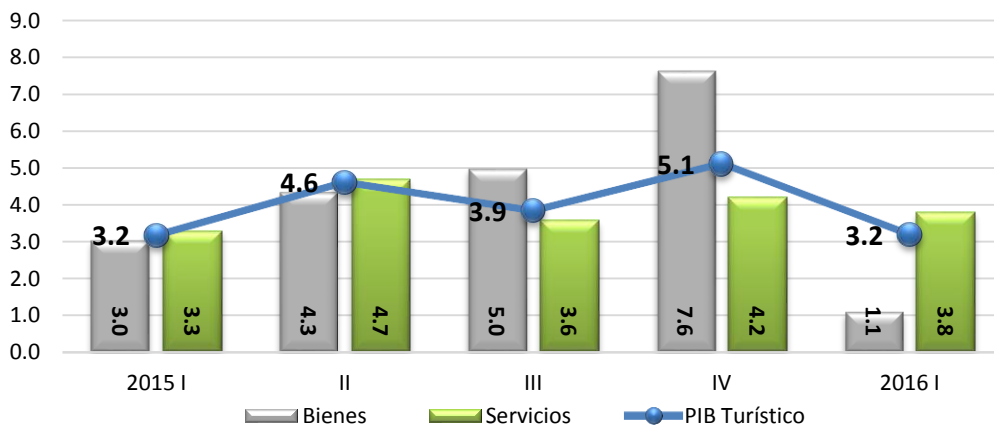
Preliminary figures.

Source: Airports and Auxiliary Services.

<http://www.datatur.sectur.gob.mx/SitePages/TrasnAerea.aspx>

**Chart 14.** According to seasonally adjusted series, the Quarterly Indicator of Tourism Activity grew 3.2% in the 1Q16 compared to the same period 2015. With this result, tourism GDP growth accumulated five consecutive quarters in a row above the national GDP growth. By component, services increased 3.8% y-o-y, while goods rose 1.1% y-o-y in the same period.

**Chart 14. Quarterly Indicator of Tourism Activity**



Seasonally adjusted.

Source: National Institute of Statistics and Geography (INEGI).

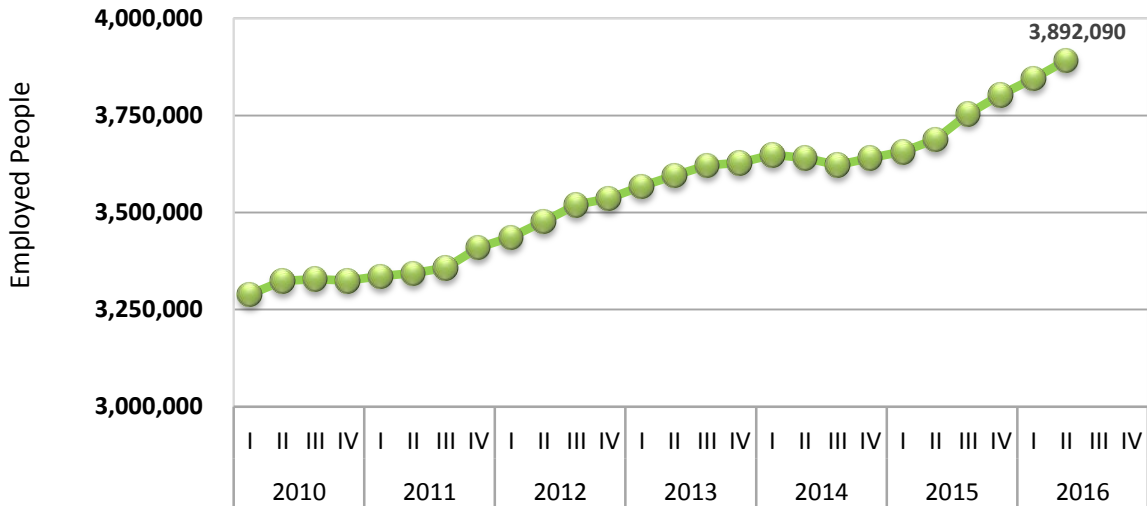
<http://www.datatur.sectur.gob.mx/SitePages/ResultadosITAT.aspx>



## Tourism Employment\*

**Chart 15.** In the second quarter of 2016, the population employed in the tourism sector of Mexico surpassed three million 892 thousand jobs, which represents a high record for the series since 2006 and represented 8.4% of total employment.

**Chart 15. Tourism Employment**

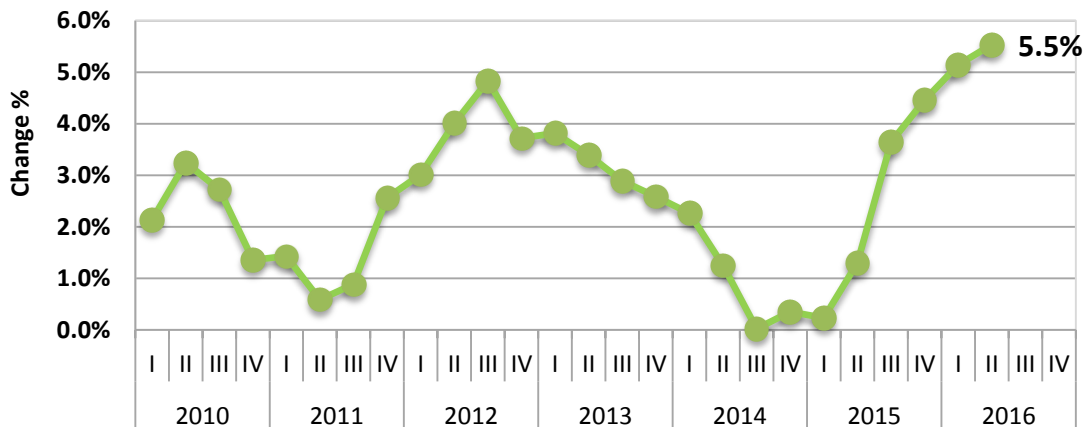


Fuente: INEGI y SECTUR.

<http://www.datatur.sectur.gob.mx/SitePages/ResultadosITET.aspx>

**Chart 16.** Tourism employment increased 5.5% in the second quarter of 2016 compared to the same period of 2015. Meanwhile, the employed population nationwide grew 2.2% in annual terms in the second quarter of 2016.

**Chart 16. Tourism employment (percentage change over the same quarter of the previous year)**



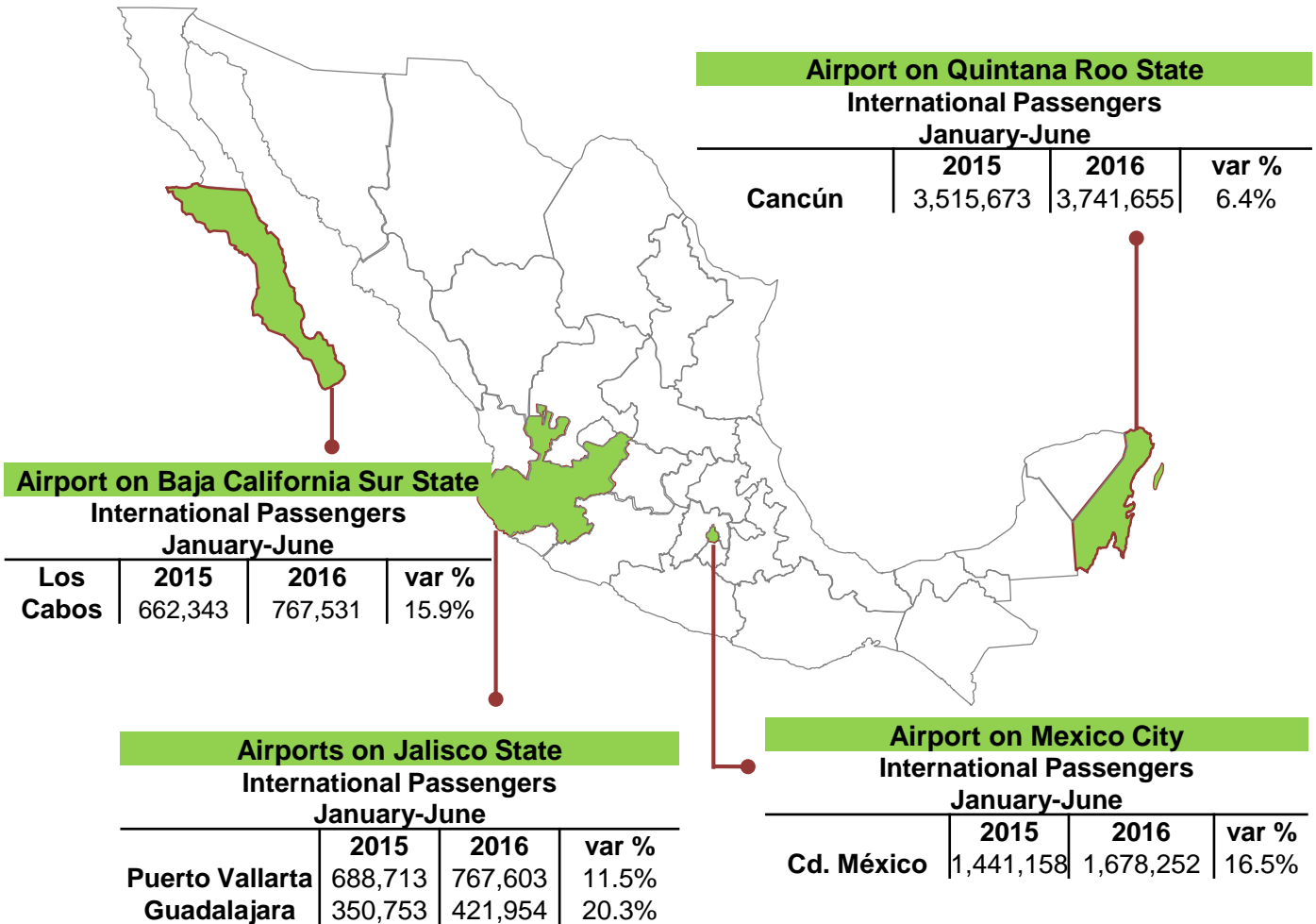
Fuente: INEGI y SECTUR.

<http://www.datatur.sectur.gob.mx/SitePages/ResultadosITET.aspx>

\* NOTE: Direct jobs based on the National Survey of Occupation and Employment (ENOE) subsectors related to tourism.

## Main airports

**Figure 1.** In January-Jun 2016 the airports with the highest number of foreign passengers were: Cancún (3,741,655); Ciudad de México (1,678,252); Puerto Vallarta (767,603); Los Cabos (767,531); y Guadalajara (421,954); which represents 90.2% of all foreign passengers.



Source: Migration Policy Unit, SEGOB.

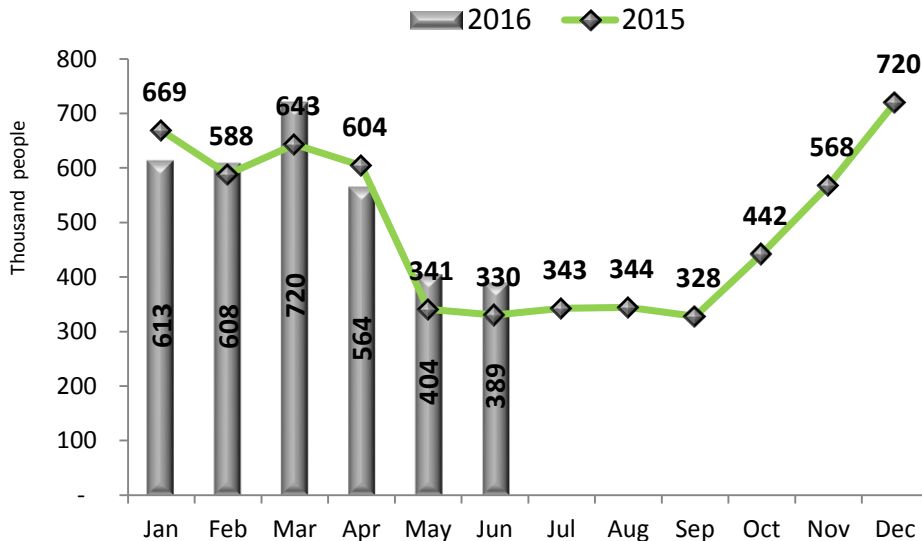
<http://www.datatur.sectur.gob.mx/SitePages/Visitantes%20Por%20Nacionalidad.aspx>

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.

## Maritime transportation

**Chart 17.** During January-June of 2016, the number of cruise passengers was 3.2 million passengers; this is an increase of 3.8% in comparison to the same period of last year.

**Chart 17. Monthly Arrival of Passengers by Cruise**

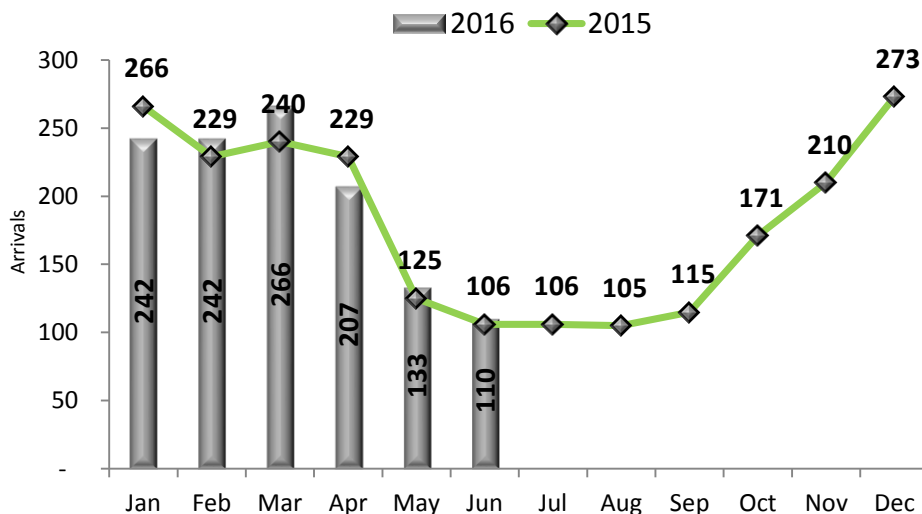


January-May	Thousand passengers	Change %
2015	3,176	
2016	3,298	3.8%

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

**Chart 18.** The number of cruise's arrivals in January-June of 2016 increased by five, reaching 1.2 thousands, an increase of 0.4% with respect to the same period of previous year.

**Chart 18. Monthly Cruise's Arrivals**

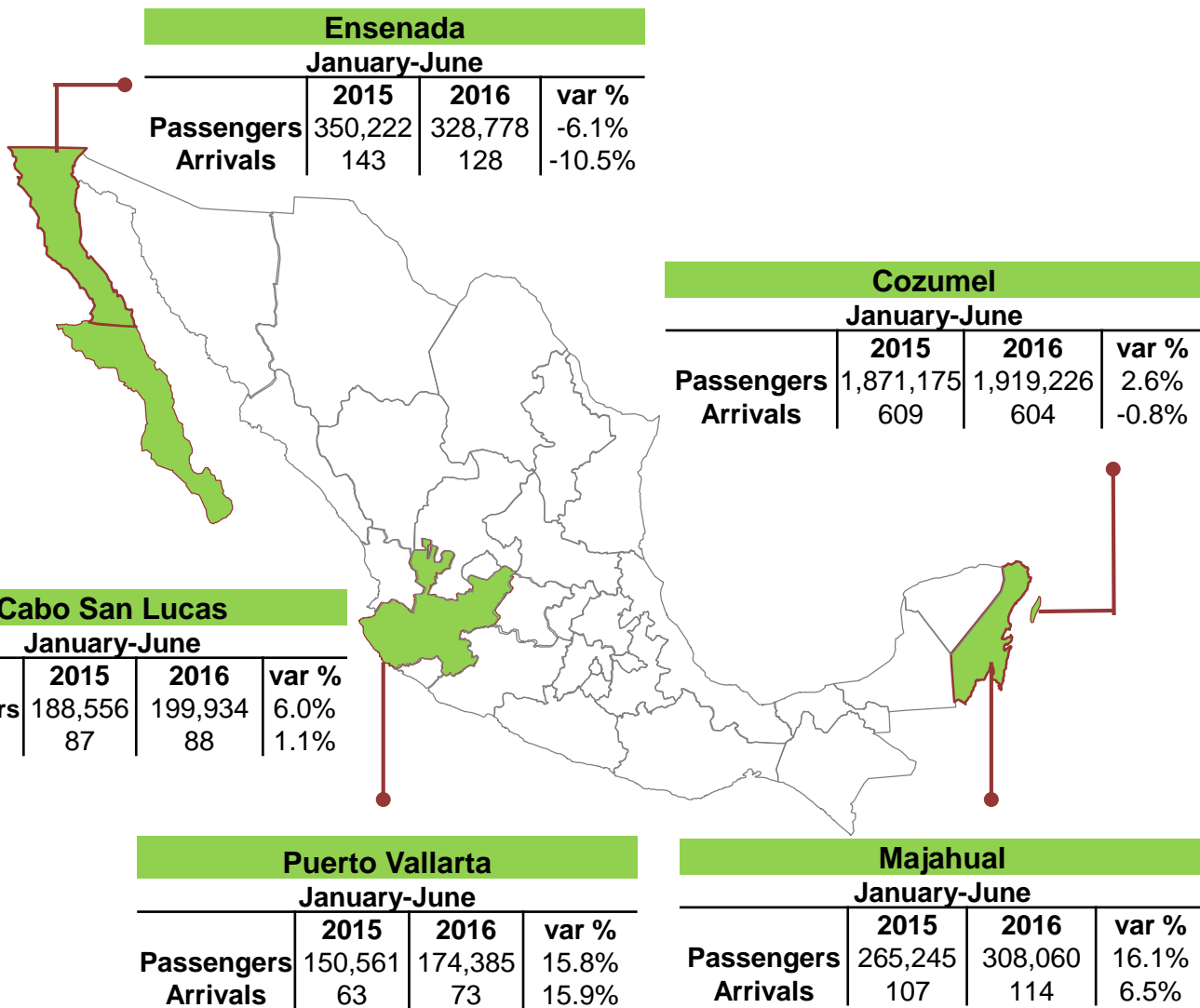


January-May	Arrivals	Change %
2015	1,195	
2016	1,200	0.4%

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

## Main ports

**Figure 2.** In January-June of 2016 the ports that received the highest number of passengers were the following: Cozumel, Ensenada and Majahual; representing 77.5% of total arrivals in the six months.



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

## RESULTS OF TOURISM ACTIVITY

Subject	Unit of measurement	Year (January-December)			Change % 15/14	Accumulated (January-June)		Change % 16/15
		2013	2014	2015		2015	2016	
<b>International travelers balance (Banco de México)</b>								
Inbound traveler expenditures	Million dollars	13,949.0	16,208.4	17,733.7	9.4%	9,319.8	10,063.4	8.0%
Outbound traveler expenditures	Million dollars	9,122.4	9,605.8	10,098.1	5.1%	4,751.3	4,681.0	-1.5%
International travelers balance	Million dollars	4,826.6	6,602.6	7,635.6	15.6%	4,568.5	5,382.4	17.8%
<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	7.5%	43,060.0	47,117.9	9.4%
International tourists	Thousand	24,150.5	29,345.6	32,093.3	9.4%	15,693.2	17,049.1	8.6%
Long-stay tourists	Thousand	14,561.9	15,999.9	18,307.2	14.4%	9,021.3	10,185.2	12.9%
Border tourists	Thousand	9,588.6	13,345.7	13,786.1	3.3%	6,671.9	6,863.9	2.9%
Same-day travelers	Thousand	53,949.7	51,696.5	55,035.3	6.5%	27,366.9	30,068.8	9.9%
In border area travelers	Thousand	49,394.2	45,911.2	48,920.5	6.6%	24,083.0	26,608.3	10.5%
In cruises travelers	Thousand	4,555.4	5,785.2	6,114.8	5.7%	3,283.9	3,460.6	5.4%
<b>Inbound travelers expenditure (Million dollars)</b>								
International visitors	Million dollars	13,949.0	16,208.4	17,733.7	9.4%	9,319.8	10,063.4	8.0%
International tourists	Million dollars	11,853.8	14,320.0	15,825.7	10.5%	8,343.9	9,070.9	8.7%
Long-stay tourists	Million dollars	11,311.5	13,579.9	15,035.0	10.7%	7,946.9	8,703.3	9.5%
Border tourists	Million dollars	542.2	740.1	790.7	6.8%	396.9	367.6	-7.4%
Same-day travelers	Million dollars	2,095.2	1,888.4	1,908.0	1.0%	975.9	992.4	1.7%
In border area travelers	Million dollars	1,737.1	1,469.6	1,508.9	2.7%	754.5	785.0	4.0%
In cruises travelers	Million dollars	358.1	418.8	399.2	-4.7%	221.4	207.4	-6.3%
<b>Average expenditure (dollars)</b>								
International visitors	Dollars	178.6	200.0	203.5	1.8%	216.4	213.6	-1.3%
International tourists	Dollars	490.8	488.0	493.1	1.1%	531.7	532.0	0.1%
Long-stay tourists	Dollars	776.8	848.8	821.3	-3.2%	880.9	854.5	-3.0%
Border tourists	Dollars	56.5	55.5	57.4	3.4%	59.5	53.6	-10.0%
Same-day travelers	Dollars	38.8	36.5	34.7	-5.1%	35.7	33.0	-7.4%
In border area travelers	Dollars	35.2	32.0	30.8	-3.6%	31.3	29.5	-5.8%
In cruises travelers	Dollars	78.6	72.4	65.3	-9.8%	67.4	59.9	-11.1%
<b>Quarterly Indicator of Tourism Activity* (index 2008=100, seasonally adjusted series) INEGI. First Quarterly</b>								
Tourism GDP	Annual percentages	1.9	1.3	4.8	4.8	3.2	3.2	N.D.
Goods	Annual percentages	-3.6	-7.0	7.5	7.5	2.7	1.1	N.D.
Services	Annual percentages	3.0	3.1	4.1	4.1	3.3	3.8	N.D.
Internal tourism consumption	Annual percentages	1.9	0.5	7.5	7.5	3.8	6.4	N.D.
Domestic tourism consumption	Annual percentages	1.1	-1.5	4.2	4.2	1.0	3.2	N.D.
Inbound tourism consumption	Annual percentages	9.3	15.7	30.0	30.0	23.7	24.3	N.D.
<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	12.8%	26,958.6	29,850.2	10.7%
International flights	Thousands	15,703.3	17,125.6	19,279.3	12.6%	9,703.2	10,532.1	8.5%
Domestic flights	Thousands	30,418.8	32,830.2	37,088.3	13.0%	17,255.3	19,318.0	12.0%
<b>Foreign countries 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	17.1%	4,483.5	5,075.9	13.2%
Canada	Thousands	1,574.3	1,646.2	1,707.8	3.7%	1,074.7	1,064.6	-0.9%
<b>Movements cruise (SCT, Dirección General de Puertos)</b>								
Passenger in cruises	Thousands	4,348.9	5,563.1	5,920.9	6.4%	3,175.9	3,297.7	3.8%
Cruise's arrivals	Number	1,622.0	2,091.0	2,175.0	4.0%	1,195.0	1,200.0	0.4%
<b>Hotel business** (SECTUR)</b>								
Porcentaje de hotel ocupación	Percentage	55.6	57.1	59.6	247.2%	59.7	60.6	0.90
Arrival of tourists to hotel rooms	Thousands	47,184.0	49,649.0	52,611.0	6.0%	24,643,142.0	25,841,681.0	4.9%
<b>Number of tourist jobs*** (SECTUR based on ENOE)</b>								
Tourism employment	Thousands	3,628.2	3,641.0	3,803.4	4.5%	3,657.0	3,845.1	5.14%

\* Annual percentage change data for the last quarter of the current year compared to the last quarter of the previous year.

25/08/2016

\*\* 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.

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

## Macroeconomic Indicators

### International

- According to WTO's Barometer for July 2016 (UNWTO), Mexico remained in the 9<sup>th</sup> position in the classification of international tourist arrivals, while it moved up to 16<sup>th</sup> place from 17<sup>th</sup> in foreign exchange earnings from international visitors in 2015.
- In the recent Ranking published by the World Tourism Organization, it pointed out that in the first four months of 2016, international tourist arrivals reached 348 million international, 18 million tourists more than the number registered in the same period of 2015 and equivalent to an annual growth of 5.3%.
- In response to the forecasts provided by the WTO in its latest Barometer publication, the positive results observed in the first quarter of 2016 are expected to extend to May-August 2016, due to northern hemisphere holiday season. It is expected to around 500 million tourists to travel abroad.

### National

- In the second quarter 2016, real GDP grew 1.5% y-o-y in seasonally adjusted terms.
- According to original series, some components of GDP related to tourism such as air transport services, temporary accommodation services and preparation of food and beverages registered annual growth of 18.9%, 2.0% and 2.9% respectively in the second quarter of 2016
- In June, headline inflation remained below the central bank's target of 3.0% of at 2.5%.

## Macroeconomic Indicators

### Macroeconomic Perspective on Key Indicators of Mexico

Entity	Gross Domestic Product		Inflation	
	Constant prices (percent change)		(% dec/dec)	
	2016	2017	2016	2017
International Monetary Fund	2.41	2.57	3.31	3.02
OCDE	2.65	2.99	2.82	3.12
Banco de México Survey	2.28	2.61	3.19	3.41
Ministry of the Treasury and Public Credit	2.6 a 3.6	2.6 a 3.6	3.00	3.00

N.a. Not available.

Source: IMF, World Economic Outlook Database (April 2016); OECD, Economic Outlook (2016/05); Banco de México,

Expectations Survey Economic Specialists Private Sector (01/08/16); Secretaría de Hacienda y Crédito Público, Pre-General

Criteria for Economic Policy 2017 (April, 2016)

#### KEY ECONOMIC INDICATORS OF MEXICO

Entries	2011	2012	2013	2014	2015	2016-I
<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	17,256,000	18,127,178	18,482,682
. Constant prices annual variations in %	4.0	4.0	1.4	2.2	2.5	2.6
<b>Tertiary activities</b>						
<b>- Air Transportation (481)</b>						
. Millions of current pesos	24,367.51	27,720.08	27,063.27	34,707.61	42,495.78	44,375.48
. Constant prices annual variations in %	-0.35	7.31	8.06	9.42	16.95	17.45
<b>- Temporary Lodging Services (721)</b>						
. Millions of current pesos	137,648.4	151,098.6	163,717.8	179,524.8	195,489.0	215,083.6
. Constant prices annual variations in %	2.4	8.2	5.6	6.0	5.8	6.8
<b>- Food and Beverages Preparation Services (722)</b>						
. Millions of current pesos	160,237.9	172,438.0	177,144.8	185,939.2	205,985.1	210,513.8
. Constant prices annual variations in %	0.8	3.0	-1.7	-0.3	6.0	6.8
<b>Quarterly Indicators of Tourism Activity</b>						
<b>Tourism Gross Domestic Product</b>						
. Constant prices annual variations in %	2.9	4.6	0.8	2.2	3.8	4.1
<b>Internal Tourism Consumption</b>						
. Constant prices annual variations in %	1.8	2.9	0.9	1.1	6.4	6.5
<b>- Domestic tourism consumption</b>						
. Constant prices annual variations in %	2.9	2.3	1.0	-0.6	3.2	3.1
<b>- Inbound tourism consumption</b>						
. Constant prices annual variations in %	-6.2	7.8	0.5	15.0	29.1	24.5
<b>Tourism Employment</b>						
<b>People Employed in the Tourism Sector*</b>	3,409,804	3,536,686	3,628,195	3,640,970	3,803,442	3,845,089
<b>Total number of IMSS-Insure Workers an Unemployment Rate</b>						
Employees insured by IMSS (average of the period)	15,153,643	15,856,137	16,409,302	16,990,724	17,724,222	18,067,868
. Permanent	13,101,612	13,637,937	14,123,077	14,570,291	15,170,986	15,471,791
. Non-permanent (urban and field)	2,052,031	2,218,200	2,286,225	2,420,433	2,553,236	2,596,077
<b>Unemployment National Rate ** (closing of the period)</b>						
. Total Percentage of PEA	4.51	4.40	4.89	4.28	4.52	4.04
<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%	2.60%
. Air transport (percent variation)	7.58%	-7.74%	0.20%	16.72%	3.17%	3.49%
. Hotel (percent variation)	6.41%	1.11%	3.14%	4.84%	4.18%	7.13%
. Package Tourist Services (percent variation)	5.72%	1.59%	4.90%	5.13%	7.62%	3.81%
. Restaurants (percent variation)	4.43%	4.20%	3.62%	6.03%	4.86%	4.78%
<b>Exchange Rate (peso / dollar)</b>						
. Average of the period	12.4233	13.1695	12.7720	13.2925	15.8483	18.0667
<b>Business Cycle Indicators and Consumer Confidence (monthly difference****)</b>						
. Coincident Indicator	0.060	-0.064	-0.031	0.027	-0.015	-0.017
. Forward Indicator	0.027	0.094	0.006	-0.094	-0.104	-0.060
. Confidence Consumer Index	0.113	0.072	-0.266	0.058	-0.017	-0.070