

# Results of Tourism Activity

Mexico, October 2016



Árbol del Tule, Oaxaca.



La Tovará, Nayarit.

Undersecretariat of Planning and  
Tourism Policy

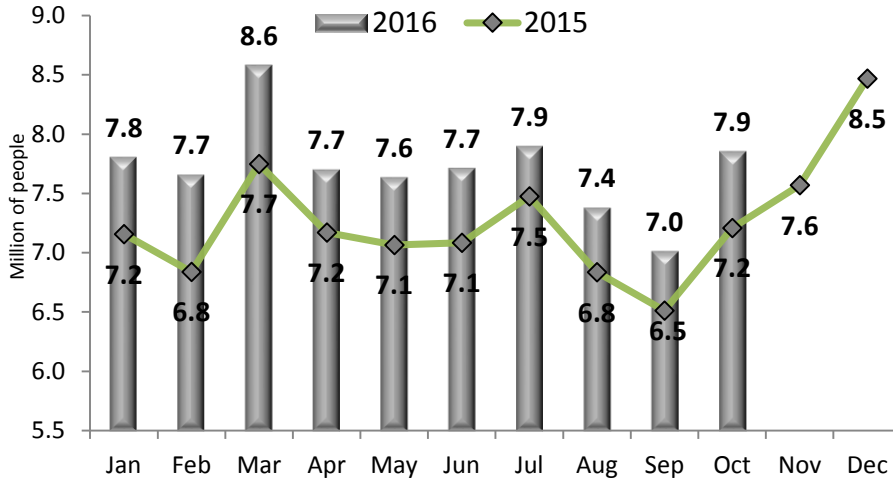
Reporting Date: December 13, 2016

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

## International visitors

**Chart 1.** Bank of Mexico reported that the arrival of international travelers during the January-October period of 2016 was 77.3 million, which represents an increase of 8.7%. In October 2016, 7.8 million travelers arrived, 9.0% more than the number registered in the same month last year (7.2 million travelers). This is the highest level for October since 2010.

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



Source: Balance of payments, Banco de México.

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

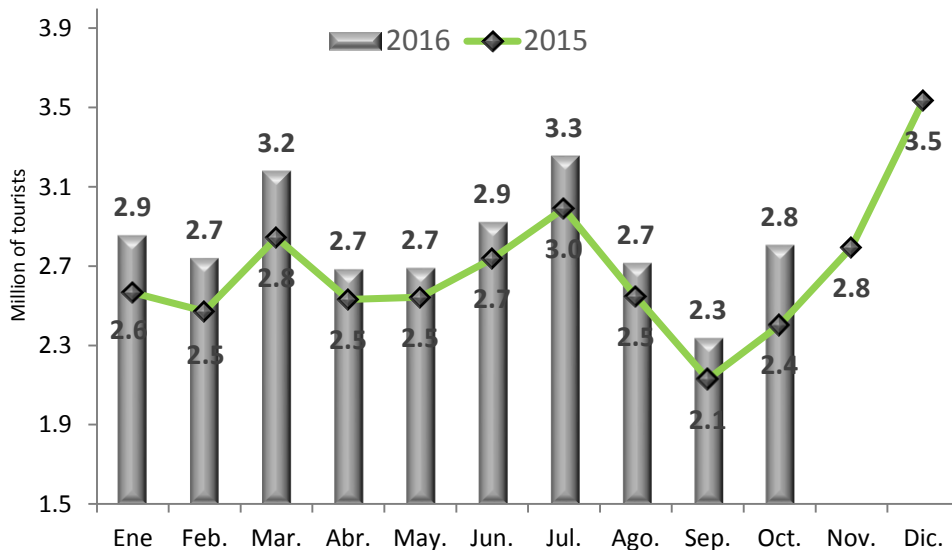
January-October	Million visitors	Change %
2015	71.1	
2016	77.3	8.7%

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

## International tourists

**Chart 2.** The arrival of international tourists during January-October 2016 was 28.1 million, an increase of 9.3%. In October 2016, international tourists arrivals reached 2.8 millions, which represents an annual increase of 16.6%. This is the highest number for October since 2010.

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



Source: Balance of payments, Banco de México.

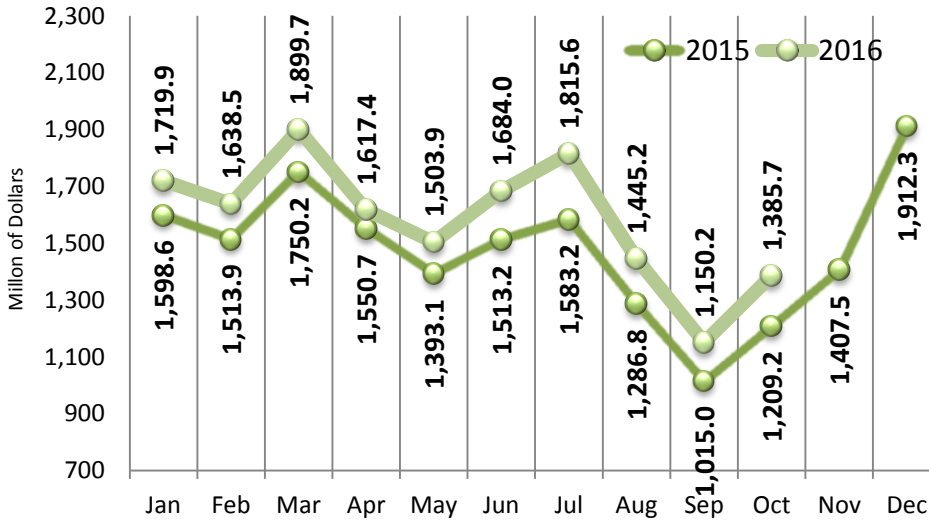
<http://www.datatur.sectur.gob.mx/SitePages/VisitantesInternacionales.aspx>

January-October	Million tourists	Change %
2015	25.7	
2016	28.1	9.3%

## Foreign Currency Income by International visitors

**Chart 3.** The income of foreign exchange from international visitors during January-October of 2016 was 15,860 million dollars, an increase of 10.0%.

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



January-October	Million dollars	Change %
2015	14,414	
2016	15,860	10.0%

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 during January-October of 2016 recorded 7,511 million, an amount 21.1% 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-October	Million dollars	Change %
2015	6,203	
2016	7,511	21.1%

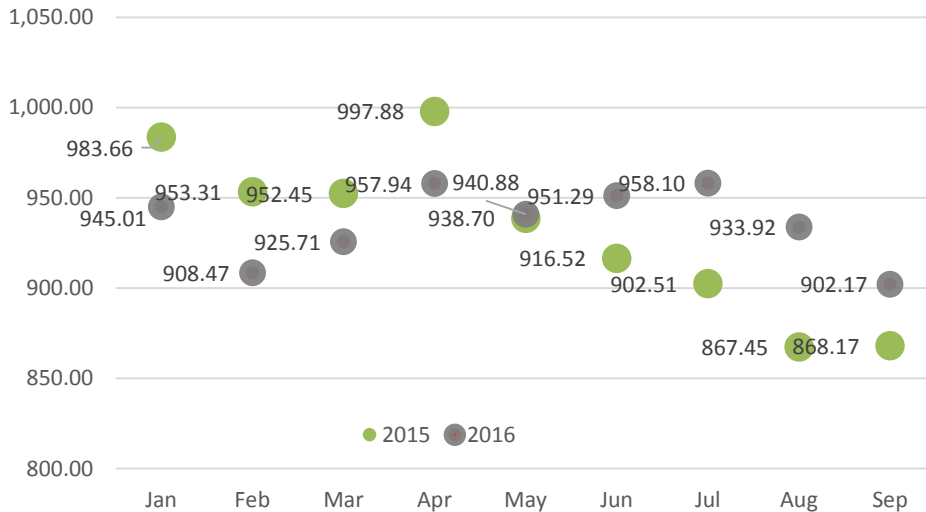
Source: Balance of payments, Banco de México.

<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 933.9 dollars during January-October 2016, an amount 0.7% above of the observed in the same period of 2015. Among the factors explaining this evolution are: the appreciation of the dollar against the Mexican peso.

**Chart 5. Average Expenditure (international tourists by air)**



January-October	Dollars	Change %
2015	927.6	
2016	933.9	0.7%

Source: Balance of payments, Banco de México.

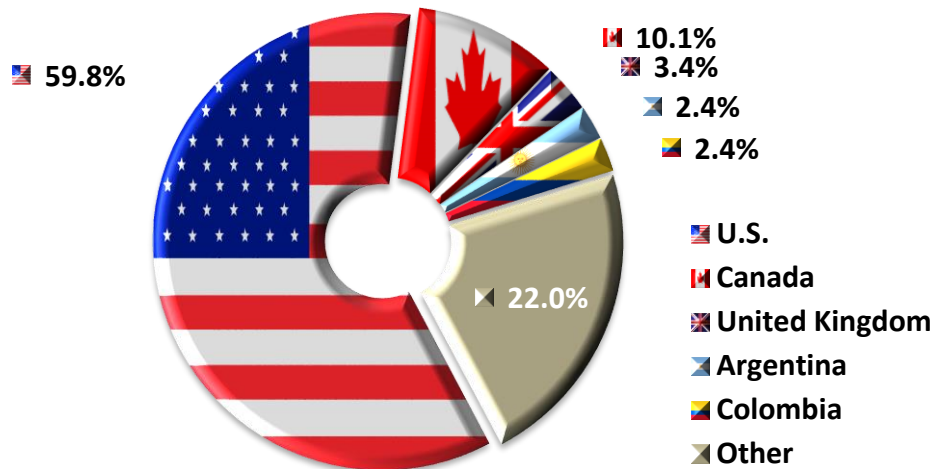
<http://www.datatur.sectur.gob.mx/SitePages/VisitantesInternacionales.aspx>

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

**Chart 6.** In January-October of 2016, the arrival of foreign air-coming visitors who reside in the **United States**, accounted for **59.8%**.

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.

**Chart 6. Participation of International Visitors**



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".

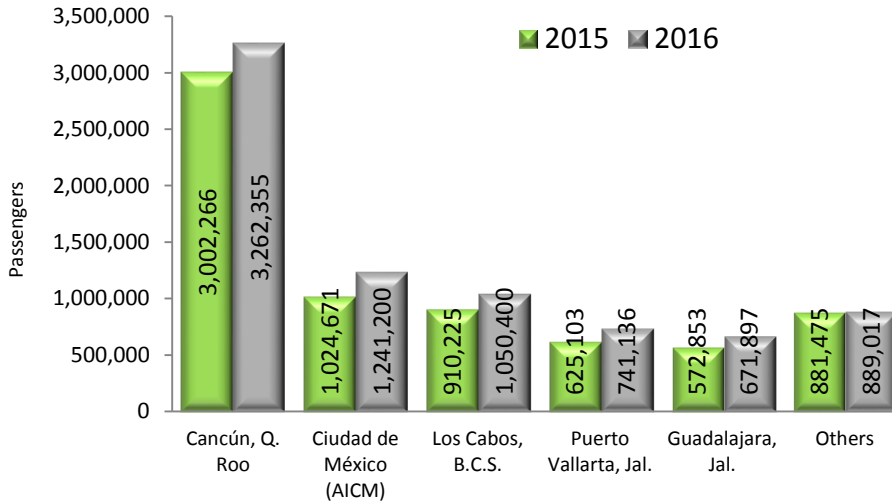
Source: Migration Policy Unit, SEGOB.

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

## Foreign passengers arriving by Air (American)

**Chart 7.** The arrivals of American residents by air to Mexico increased 12.0% in January-October 2016 in comparison to the same period 2015, reaching 7.8 million passengers who arrived mainly by Cancun Airport, followed by Mexico City Airport.

**Chart 7. American Residents per Airport**



January-October	Passengers	Change %
2015	7,016,593	
2016	7,856,005	12.0%

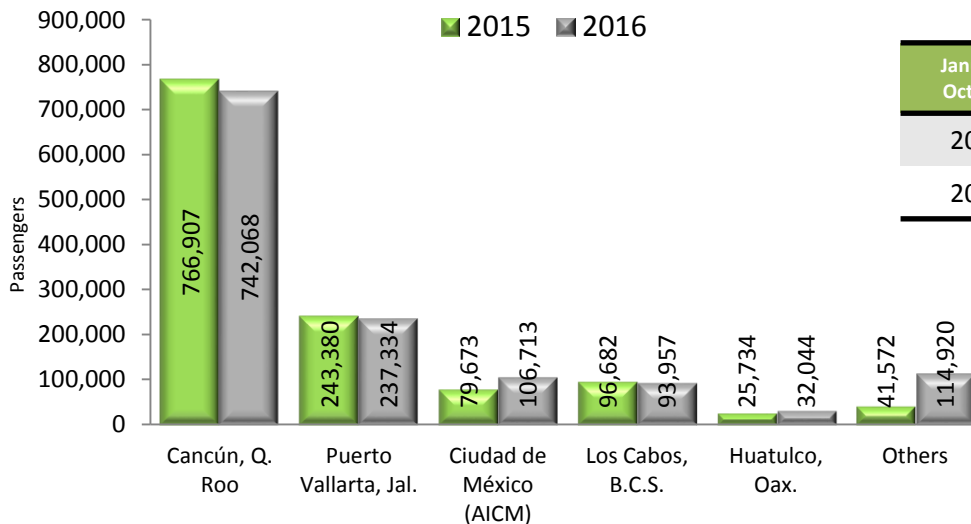
Source: Migration Policy Unit, SEGOB.

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

## Foreign passengers arriving by Air (Canadian)

**Chart 8.** The arrivals of Canadian residents by air to México were 0.1% lower during January-October of 2016 in comparison with the same period of 2015, reaching 1,327,036 passengers who arrived mainly by Cancun Airport, followed by Puerto Vallarta Airport.

**Chart 8. Canadian Residents per Airport**



January-October	Passengers	Change %
2015	1,328,953	
2016	1,327,036	-0.1%

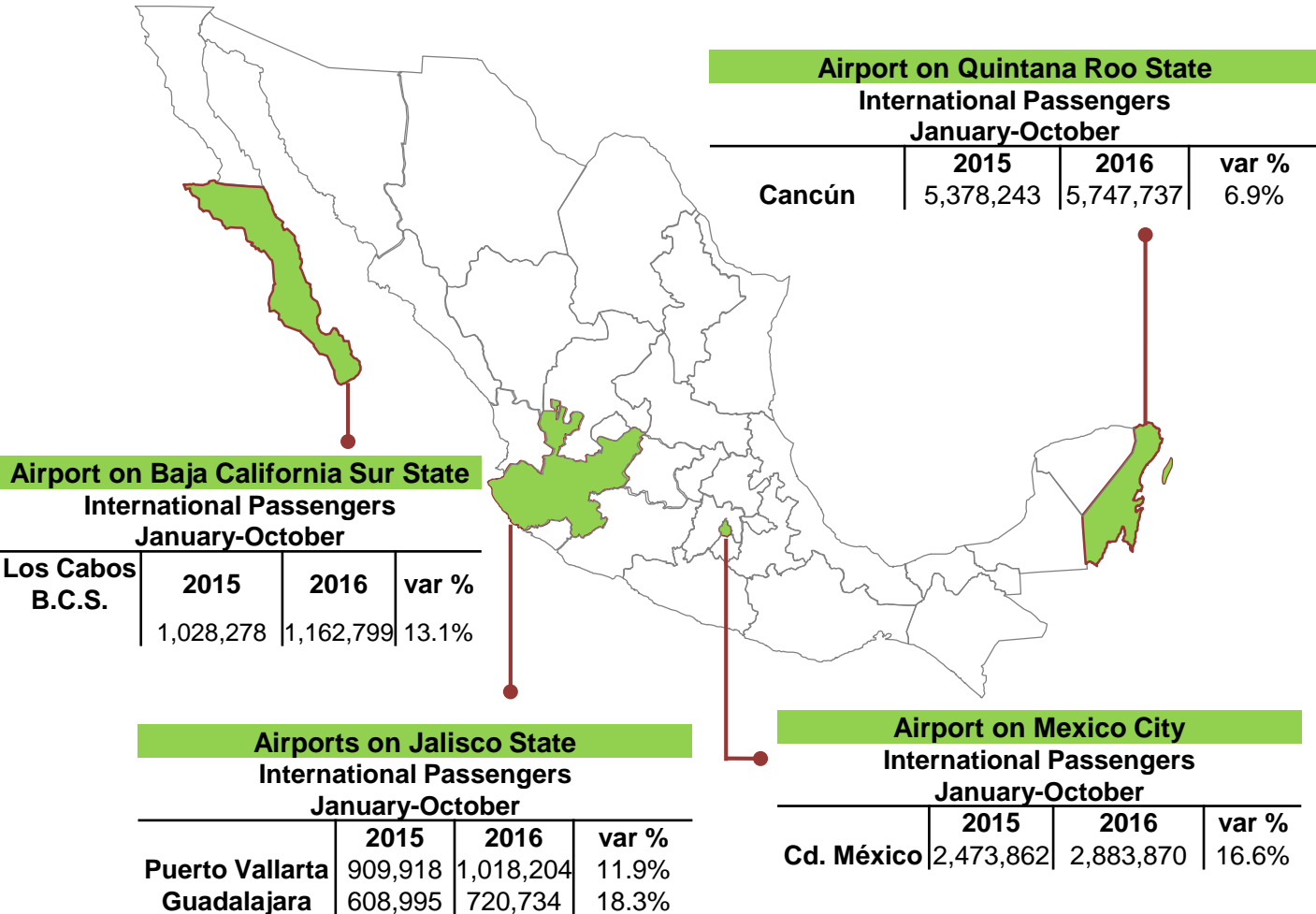
Source: Migration Policy Unit, SEGOB.

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



## Main airports

**Figure 1.** In January-October 2016 the airports with the highest number of foreign passengers were: Cancún (5,747,737); Ciudad de México (2,883,870); Los Cabos (1,162,799); Puerto Vallarta (1,018,204); y Guadalajara (720,734), which represents 90.7% of all foreign passengers.



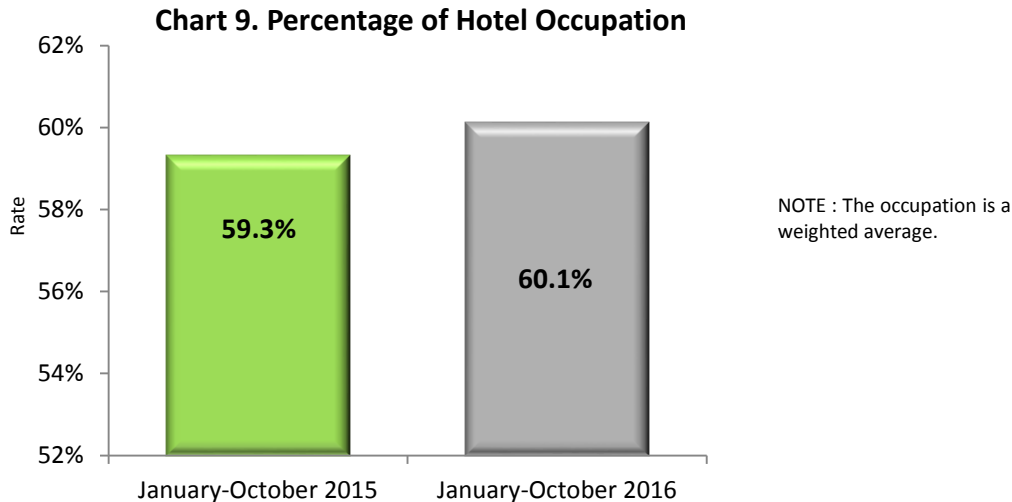
Source: Migration Policy Unit, SEGOB.

<http://www.datatur.sectur.gob.mx/SitePages/Visitantes%20Por%20Residencia.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.

## Percentage of Hotel Occupation

**Chart 9.** The percentage of hotel occupation of a group of 70 resorts during January-October of 2016 was 60.1%, 0.8 percentage points higher in comparison to the same period last year.

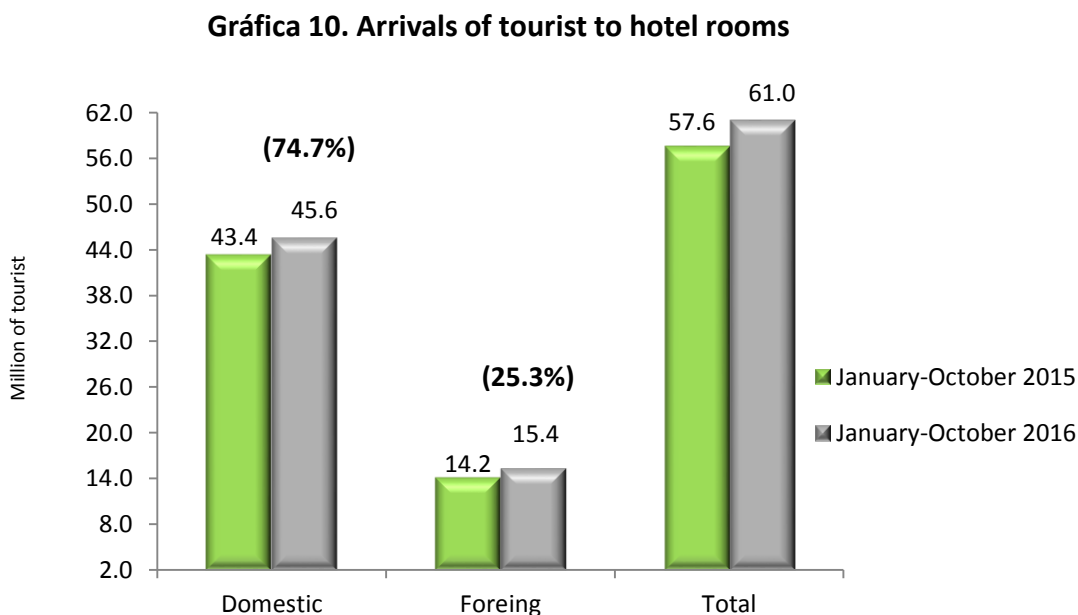


Source: Information of 70 resorts monitored by the Mexico's Tourism Information Statistics National System, DataTur.

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

## Arrival of tourists to Hotels

**Chart 10.** During January-October of 2016, the arrival of domestic tourists to hotel rooms was over 45.6 million tourists (74.7%), the remaining arrivals (25.3%) correspond to foreign tourists.



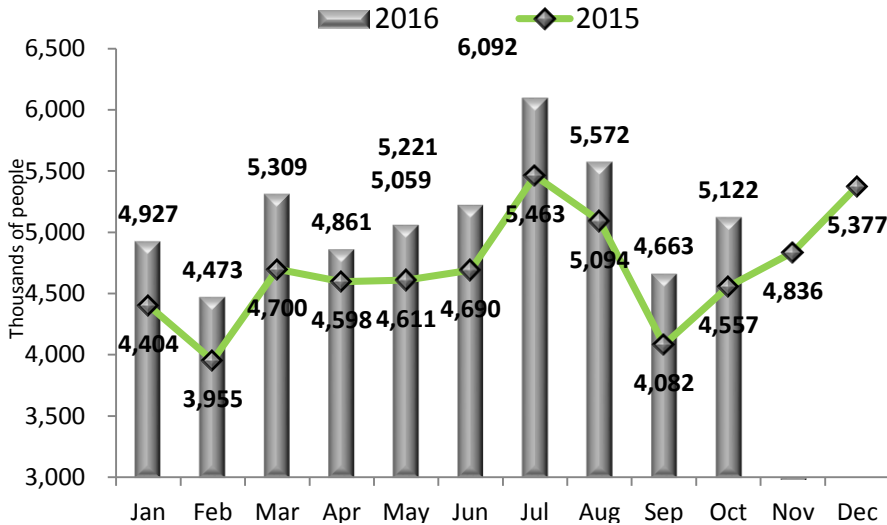
Source: Information of 70 resorts monitored by the Mexico's Tourism Information Statistics National System, DataTur.

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

## Air Transportation

**Chart 11.** The number of passengers arriving by air during January-October 2016 was 51.3 million passengers, representing five million 144 thousand passengers additional (11.1%) in comparison to the same period last year.

**Chart 11. Total Passengers**



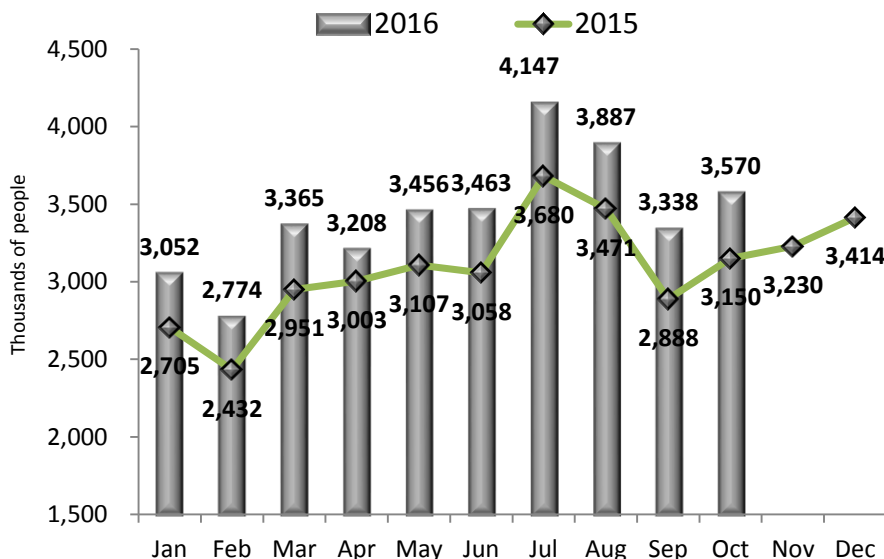
January-October	Million passengers	Change %
2015	46.1	
2016	51.3	11.1%

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-October 2016 was 34.2 million passengers, representing 3.8 millions of additional passengers (12.5%), in comparison to the same period of the last year.

**Chart 12. Passengers in Domestic Flights**



January-October	Million passengers	Change %
2015	30.4	
2016	34.2	12.5%

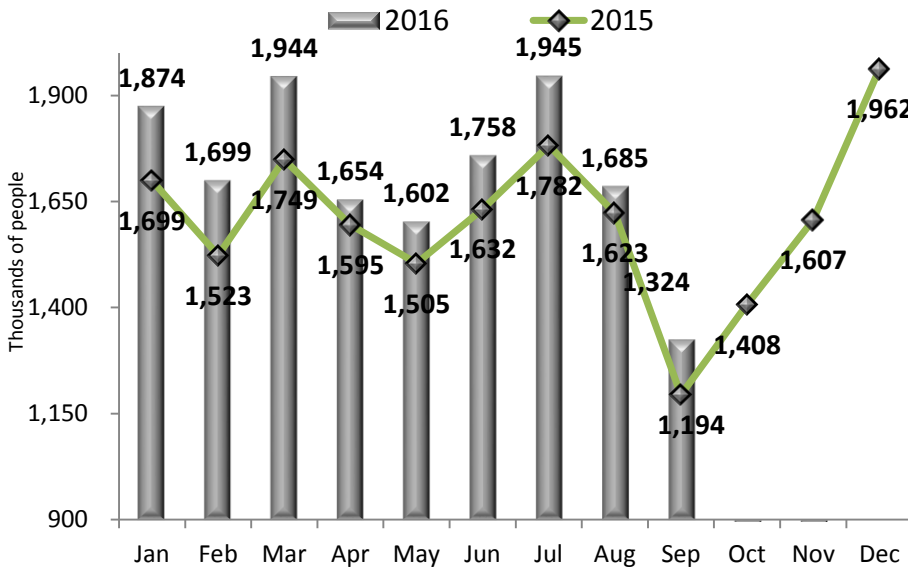
Source: General Coordination of Ports and Merchant Navy, Ministry of Communication and Transportation (SCT).

<http://www.datatur.sectur.gob.mx/SitePages/Actividades%20En%20Crucero.aspx>



**Chart 13.** In January-October of 2016, the number of passengers arriving by air on international flights increased 8.5%, with 17.0 million passengers, exceeding for one million 328 thousand passengers the amount of January-October of 2015.

**Chart 13. Passengers on International Flights**



January-October	Million passengers	Change %
2015	15.7	
2016	17.0	8.5%

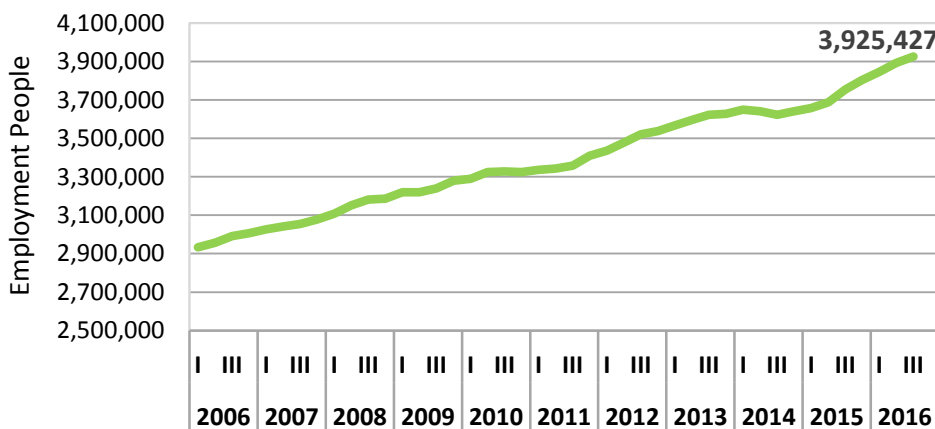
Preliminary figures.

Source: Airports and Auxiliary Services.

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

**Gráfica 14.** In the third quarter of 2016, the population employed in the tourism sector in Mexico surpassed 3 million 925 thousand direct jobs, which means a historical high of the series since 2006 and represented 8.4% of the total employment

**Chart 14. Tourism Employment (smoothed series)**  
Quarterly Basis: 2010/I – 2016/III



Third Quarterly	Million of People employment	Change %
2015.III	3.7	
2016.III	3.9	4.5%

Seasonally adjusted figures.

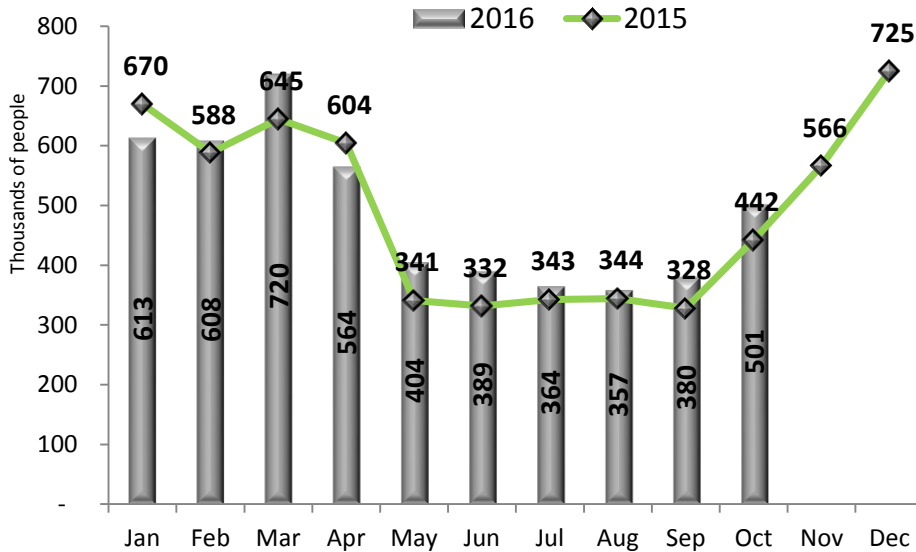
Source: INEGI.

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

## Maritime transportation

**Chart 15.** During January-October 2016, the number of cruise passengers was 4.9 million passengers; this is an increase of 5.7% in comparison to the same period of last year.

**Chart 15. Monthly Arrival of Passengers by Cruise**

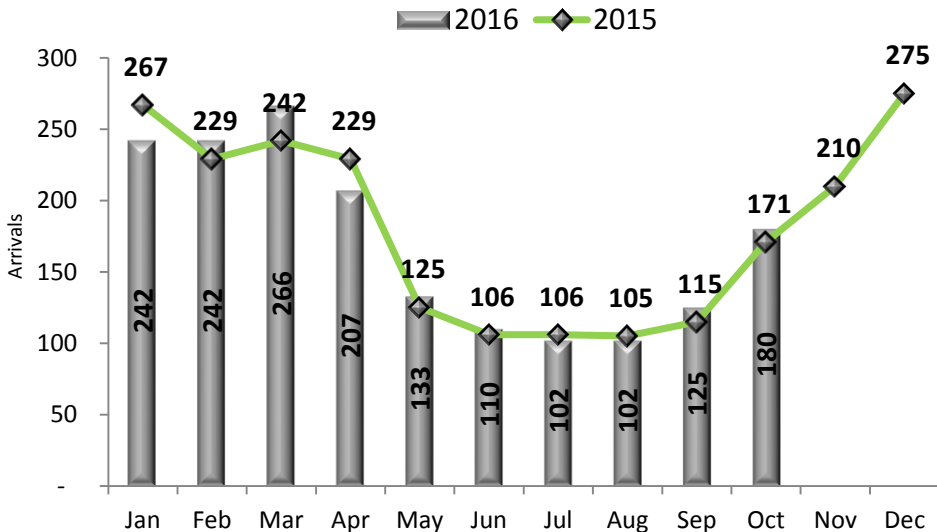


January-October	Thousand pasengers	Change %
2015	4,637.5	
2016	4,899.9	5.7%

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 16.** The number of cruise's arrivals in January-October 2016 increased 0.8% with respect to the same period of previous year, reaching 1.7 thousands.

**Chart 16. Monthly Cruise's Arrivals**



January-October	Arrivals	Change %
2015	1,695	
2016	1,709	0.8%

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>

## Main ports

**Figure 2.** Ports that received the highest number of passengers were the following: Cozumel, Ensenada and Majahual; representing 78.0% of total arrivals during January-October 2016.

Ensenada			
January-October			
	2015	2016	var %
Passengers	576,885	531,261	576,885
Arrivals	232	206	232

Cozumel			
January-October			
	2015	2016	var %
Passengers	2,692,452	2,850,607	5.9%
Arrivals	851	863	1.4%

Cabo San Lucas			
January-October			
	2015	2016	var %
Passengers	275,285	280,750	2.0%
Arrivals	124	123	-0.8%

Puerto Vallarta			
January-October			
	2015	2016	var %
Passengers	229,141	249,241	8.8%
Arrivals	96	104	8.3%

Majahual			
January-October			
	2015	2016	var %
Passengers	307,502	441,568	43.6%
Arrivals	120	147	22.5%

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-October)		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%	14,414.0	15,860.1	10.0%
Outbound traveler expenditures	Million dollars	9,122.4	9,605.8	10,098.1	5.1%	8,210.9	7,453.3	-9.2%
International travelers balance	Million dollars	4,826.6	6,602.6	7,635.6	15.6%	6,203.1	8,406.8	35.5%
<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%	71,090.3	77,278.7	8.7%
International tourists	Thousand	24,150.5	29,345.6	32,093.3	9.4%	25,764.1	28,151.7	9.3%
Long-stay tourists	Thousand	14,561.9	15,999.9	18,307.2	14.4%	14,491.2	16,214.4	11.9%
Border tourists	Thousand	9,588.6	13,345.7	13,786.1	3.3%	11,272.8	11,937.3	5.9%
Same-day travelers	Thousand	53,949.7	51,696.5	55,035.3	6.5%	45,326.3	49,127.0	8.4%
In border area travelers	Thousand	49,394.2	45,911.2	48,920.5	6.6%	40,534.5	43,991.6	8.5%
In cruises travelers	Thousand	4,555.4	5,785.2	6,114.8	5.7%	4,791.8	5,135.4	7.2%
<b>Inbound travelers expenditure (Million dollars)</b>								
International visitors	Million dollars	13,949.0	16,208.4	17,733.7	9.4%	14,414.0	15,860.1	10.0%
International tourists	Million dollars	11,853.8	14,320.0	15,825.7	10.5%	12,835.4	14,263.4	11.1%
Long-stay tourists	Million dollars	11,311.5	13,579.9	15,035.0	10.7%	12,182.2	13,622.6	11.8%
Border tourists	Million dollars	542.2	740.1	790.7	6.8%	653.1	640.7	-1.9%
Same-day travelers	Million dollars	2,095.2	1,888.4	1,908.0	1.0%	1,578.6	1,596.7	1.1%
In border area travelers	Million dollars	1,737.1	1,469.6	1,508.9	2.7%	1,261.0	1,289.1	2.2%
In cruises travelers	Million dollars	358.1	418.8	399.2	-4.7%	317.6	307.6	-3.2%
<b>Average expenditure (dollars)</b>								
International visitors	Dollars	178.6	200.0	203.5	1.8%	202.8	205.2	1.2%
International tourists	Dollars	490.8	488.0	493.1	1.1%	498.2	506.7	1.7%
Long-stay tourists	Dollars	776.8	848.8	821.3	-3.2%	840.7	840.2	-0.1%
Border tourists	Dollars	56.5	55.5	57.4	3.4%	57.9	53.7	-7.4%
Same-day travelers	Dollars	38.8	36.5	34.7	-5.1%	34.8	32.5	-6.7%
In border area travelers	Dollars	35.2	32.0	30.8	-3.6%	31.1	29.3	-5.8%
In cruises travelers	Dollars	78.6	72.4	65.3	-9.8%	66.3	59.9	-9.6%
<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%	46,154.8	51,299.2	11.1%
International flights	Thousands	15,703.3	17,125.6	19,279.3	12.6%	15,710.3	17,039.0	8.5%
Domestic flights	Thousands	30,418.8	32,830.2	37,088.3	13.0%	30,444.5	34,260.3	12.5%
<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	17.1%	7,016.6	7,856.0	12.0%
Canada	Thousands	1,574.3	1,646.2	1,707.8	3.7%	1,329.0	1,327.0	-0.1%
<b>Movements cruise (SCT, Dirección General de Puertos)</b>								
Passenger in cruises	Thousands	4,348.9	5,563.1	5,929.2	6.6%	4,637.6	4,900.0	5.7%
Cruise's arrivals	Number	1,622.0	2,091.0	2,180.0	4.3%	1,695.0	1,709.0	0.8%
<b>Hotel business** (SECTUR)</b>								
Porcentaje de hotel ocupación	Percentage	55.6	57.1	59.6	2.47	59.3	60.1	0.8
Arrival of tourists to hotel rooms	Thousands	47,184.0	49,649.0	52,611.0	6.0%	57,621.5	61,046.0	5.9%
<b>Number of tourist jobs*** (SECTUR based on ENOE)</b>								
Tourism employment	Thousands	3,628.2	3,641.0	3,803.4	4.5%	3,754.6	3,925.4	4.5%
<b>Quarterly Indicator of Tourism Activity* (index 2008=100, seasonally adjusted series) INEGI.</b>								
<b>Second Quarter</b>								
Tourism GDP	Annual percentages	1.9	1.3	4.8	4.8	4.7	3.4	N.A.
Goods	Annual percentages	-3.6	-7.0	7.5	7.5	4.3	4.5	N.A.
Services	Annual percentages	3.0	3.1	4.1	4.1	4.7	3.2	N.A.
Internal tourism consumption	Annual percentages	1.9	0.5	7.5	7.5	6.5	6.1	N.A.
Domestic tourism consumption	Annual percentages	1.1	-1.5	4.2	4.2	3.4	3.6	N.A.
Inbound tourism consumption	Annual percentages	9.3	15.7	30.0	30.0	28.9	19.6	N.A.

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

16/12/2016

\*\* 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.

NA Not apply

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

## Macroeconomic Indicators

### International

For the last five years the global economy has been in a low-growth trap, with growth disappointingly low and stuck at around 3%.

- Persistent growth shortfalls have weighed on future output expectations and thereby reduced current spending and potential output growth.
- Global trade and investment have been weak, limiting the advances in labour productivity and wages that are required to support sustainable consumption growth.

However, fiscal policies, both implemented and proposed, could, if effective, catalyse private economic activity and push the global economy to a modestly higher growth rate of around 3.5% by 2018. In order to ensure the exit from the low-growth equilibrium, there is a need for effective and collective policy efforts to support aggregate demand in the short term and raise potential growth in the longer term.

### National

Growth will be held back in 2017 and 2018, mostly through investment and consumer confidence, following uncertainties about future US policy, although the economy could benefit from stronger import demand from the United States:

- Economic activity has been resilient to sharply lower oil prices, weak world trade growth and monetary policy tightening in the United States:
- Domestic demand remains the main driver of economic activity, supported by recent structural reforms that have cut prices to consumers, notably on electricity and telecoms services.
- The Organization for Economic Co-operation and Development (OECD) estimates the GDP growth of the Mexican economy for 2016 at 2.3% and 3.4% for 2017.

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

## 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	2.09	2.33	3.16	3.14
OCDE	2.27	3.37	3.44	3.51
Banco de México Survey	2.08	1.72	3.41	3.77
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); Banco de México, Expectations Survey Economic Specialist Private Sector (02/12/16); Secretaría de Hacienda y Crédito Público, General Criteria for Economic Policy 2017 (September, 2016)

#### KEY ECONOMIC INDICATORS OF MEXICO

Entries	2011	2012	2013	2014	2015	2016-I	2016-II	2016-III	Oct-16
<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	18,558,615	19,192,011	19,614,777	
. Constant prices annual variations in %	4.0	4.0	1.4	2.3	2.6	2.3	2.6	2.0	
<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	39,827.12	41,623.22	47,302.45	51,497.61	
. Constant prices annual variations in %	-0.35	7.31	8.06	9.42	7.70	13.95	18.54	14.97	
<b>- Temporary Lodging Services (721)</b>									
. Millions of current pesos	137,648.4	151,098.6	163,717.8	179,524.8	200,136.7	220,283.5	209,795.5	221,172.0	
. Constant prices annual variations in %	2.4	8.2	5.6	6.0	5.6	6.7	2.0	3.1	
<b>- Food and Beverages Preparation Services (722)</b>									
. Millions of current pesos	160,237.9	172,438.0	177,144.8	185,939.2	208,668.0	213,123.9	213,160.6	213,160.6	
. Constant prices annual variations in %	0.8	3.0	-1.7	-0.3	6.1	6.9	2.9	2.8	
<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	3,803,442	3,845,089	3,892,090	3,925,427	
<b>Total number of IMSS-Insure Workers</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	18,273,780	18,480,253	18,797,954
. Permanent	13,101,612	13,637,937	14,123,077	14,570,291	15,170,986	15,471,791	15,679,503	15,876,530	16,109,315
. Non-permanent (urban and field)	2,052,031	2,218,200	2,286,225	2,420,433	2,553,236	2,596,077	2,594,277	2,603,723	2,688,639
<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	3.93	4.03	3.56
<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%	2.5%	3.0%	3.1%
. Air transport (percent variation)	7.58%	-7.74%	0.20%	16.72%	3.17%	3.49%	9.6%	7.6%	4.8%
. Hotel (percent variation)	6.41%	1.11%	3.14%	4.84%	4.18%	7.13%	5.9%	6.8%	8.9%
. Package Tourist Services (percent variation)	5.72%	1.59%	4.90%	5.13%	7.62%	3.81%	6.7%	5.9%	2.4%
. Restaurants (percent variation)	4.43%	4.20%	3.62%	6.03%	4.86%	4.78%	5.3%	5.0%	5.1%
<b>Exchange Rate (peso / dollar)</b>									
. Average of the period	12.4233	13.1695	12.7720	13.2925	15.8483	18.0667	18.0600	18.7282	18.9480
<b>Business Cycle Indicators and Consumer Confidence (monthly difference****)</b>									
. Coincident Indicator	0.060	-0.064	-0.031	0.027	-0.015	-0.002	0.014	-0.007	ND
. Forward Indicator	0.027	0.094	0.006	-0.094	-0.104	-0.060	-0.020	-0.019	ND
. Confidence Consumer Index	0.113	0.072	-0.266	0.058	-0.017	-0.112	-0.157	-0.187	-0.145

N.D. Not available.

N/A: Not applicable (because the information is only annual and quarterly. No monthly data available for this series).

\* Quarterly indicator with information of ENEC and CSTM. Fourth quarter data is indicated for annual data.

\*\* 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 previous year is for monthly data variation.

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

Sources: SECTUR, INEGI, STYPS, Banco de México.