Results of Tourism Activity
Mexico, March  2017

Undersecretariat of Planning and Tourism Policy

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

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International Visitors to Mexico
ARRIVAL OF INTERNATIONAL VISITORS

Chart 1. According to Bank of Mexico, during January-March 2017 the number of international visitors arriving to Mexico was 2.4 million, that is 392 thousand higher than January-March 2016 and equal to an increase of 1.6% in comparison to the same period of the previous year.

<table>
<thead>
<tr>
<th>January-March</th>
<th>Million visitors</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016</td>
<td>24.1</td>
<td></td>
</tr>
<tr>
<td>2017</td>
<td>24.4</td>
<td>1.6%</td>
</tr>
</tbody>
</table>

ARRIVAL OF INTERNATIONAL TOURISTS

Chart 2. The arrival of international tourists in January-March 2017 was 9.3 million, reaching 516 thousand more than January-March 2016, an increase 5.9% in comparison to the same period of the previous year.

<table>
<thead>
<tr>
<th>January-March</th>
<th>Million passengers</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016</td>
<td>8.8</td>
<td></td>
</tr>
<tr>
<td>2017</td>
<td>9.3</td>
<td>5.9%</td>
</tr>
</tbody>
</table>

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-March 2017 was 5,781 million dollars, equivalent to an increase of 10% in comparison to same period 2016.

<table>
<thead>
<tr>
<th>January-March</th>
<th>Million dollars</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016</td>
<td>5,258.1</td>
<td></td>
</tr>
<tr>
<td>2017</td>
<td>5,781.4</td>
<td>10%</td>
</tr>
</tbody>
</table>

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

Chart 4. The balance by international visitors in January-March 2017 registered 3,468 million dollars, an increase of 16.8% in comparison to the same period in 2016.

<table>
<thead>
<tr>
<th>January-March</th>
<th>Million dollars</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016</td>
<td>2,968.8</td>
<td></td>
</tr>
<tr>
<td>2017</td>
<td>3,468.4</td>
<td>16.8%</td>
</tr>
</tbody>
</table>

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-March 2017, the average expenditure of long-stay tourists by air was 947.3 dollars, an increase of 2.2% in comparison to the same period in 2016.

<table>
<thead>
<tr>
<th>January-March</th>
<th>Dollars</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016</td>
<td>926.4</td>
<td></td>
</tr>
<tr>
<td>2017</td>
<td>947.3</td>
<td>2.2%</td>
</tr>
</tbody>
</table>

Source: Bank of Mexico, Balance of payments
http://www.datatur.sectur.gob.mx/SitePages/Visitantes%20Por%20Nacionalidad.aspx
Air Transportation
Chart 6. In January-March 2017, the arrival of foreign air-coming visitors who reside in the United States represents 58.4% of all foreign arrivals by air. From 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 1.8% of total visitors respectively.
AMERICAN PASSENGERS PER AIRPORT

Chart 7. The American residents who arrived to Mexico by air increased 9.2% in January-March 2017 compared to the same period of 2016, registering two million 802 thousands passengers who arrived firstly through the Cancun Airport, followed by Los Cabos Airport.

<table>
<thead>
<tr>
<th>January-March</th>
<th>American passengers</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016</td>
<td>2,565,838</td>
<td></td>
</tr>
<tr>
<td>2017</td>
<td>2,802,020</td>
<td>9.2%</td>
</tr>
</tbody>
</table>

CANADIAN PASSENGERS PER AIRPORT

Chart 8. The Canadian residents who arrived to Mexico by air was 9.4% higher during January-March 2017 in comparison to the same period last year, arriving firstly through the Cancun Airport, followed by Puerto Vallarta Airport.

<table>
<thead>
<tr>
<th>January-March</th>
<th>Canadian passengers</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016</td>
<td>765,284</td>
<td></td>
</tr>
<tr>
<td>2017</td>
<td>837,544</td>
<td>9.4%</td>
</tr>
</tbody>
</table>

Source: Migration Policy Unit, SEGOB
http://www.datatur.sectur.gob.mx/SitePages/Visitantes%20Por%20Residencia.aspx
Figure 1. In January-March 2017 the airports with the highest number of foreign passengers were: Cancun (2,109,729); Mexico City (960,528); Puerto Vallarta (549,891); Los Cabos (467,222); Guadalajara (215,864) and Cozumel (71,316); which represents 91.1% of all foreign passengers.

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 no longer used.
Domestic Tourism
OCCUPANCY RATE

Chart 9. The percentage of hotel occupation in a group of 70 resorts during January-March 2017 reached 62.1%, 0.3 points higher in comparison to the same period of last year.

ARRIVAL OF TOURISTS TO HOTELS

Chart 10. In January-March 2017, the arrival of domestic tourists to hotel rooms was 12.9 million tourists (69.6%), while the remaining arrivals (30.4%) 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
Chart 11. The number of passengers arriving by air increased 10.1% in January-March 2017 in comparison to the same period last year, reaching 16.2 million passengers, equivalent to an increase of one million 492 thousand passengers.

<table>
<thead>
<tr>
<th>January-March</th>
<th>Thousand passengers</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016</td>
<td>14,708.9</td>
<td></td>
</tr>
<tr>
<td>2017</td>
<td>16,201.5</td>
<td>10.1%</td>
</tr>
</tbody>
</table>

Chart 12. The number of passengers arriving by air on domestic flights in January-March 2017 was 10.2 million passengers, representing one million 75 thousand of additional passengers (11.7%), in comparison to the same period last year.

<table>
<thead>
<tr>
<th>January-March</th>
<th>Thousand passengers</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016</td>
<td>9,190.9</td>
<td></td>
</tr>
<tr>
<td>2017</td>
<td>10,266.4</td>
<td>11.7%</td>
</tr>
</tbody>
</table>
Chart 13. In January-March 2016, the number of passengers arriving by air on international flights increased 7.6% with 5.9 million passengers, exceeding by 417 thousand the number of passengers from January-March 2016.

<table>
<thead>
<tr>
<th>January-March</th>
<th>Thousand passengers</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016</td>
<td>5,518.0</td>
<td></td>
</tr>
<tr>
<td>2017</td>
<td>5,935.1</td>
<td>7.6%</td>
</tr>
</tbody>
</table>
MARITIME TRANSPORTATION

Chart 14. During January-March 2017, the number of cruise passengers reached two million 246 thousand passengers, representing an increase of 306 thousand passengers (15.8%) compared to the same period 2016.

<table>
<thead>
<tr>
<th>Year</th>
<th>Thousand passengers</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016</td>
<td>1,940.3</td>
<td></td>
</tr>
<tr>
<td>2017</td>
<td>2,246.1</td>
<td>15.8%</td>
</tr>
</tbody>
</table>

Chart 15. The number of cruise arrivals in January-March 2017 increased in 99, reaching 849, an increase of 13.2% in comparison to the same period last year.

<table>
<thead>
<tr>
<th>Year</th>
<th>Arrivals</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016</td>
<td>750</td>
<td></td>
</tr>
<tr>
<td>2017</td>
<td>849</td>
<td>13.2%</td>
</tr>
</tbody>
</table>

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
Figure 2. In January-March 2017 the ports that received the highest number of passengers were the following: Cozumel, Majahual and Ensenada; representing 78.1% of total arrivals in this period.
Museums and archeological sites
VISITORS TO MUSEUMS AND ARCHEOLOGICAL SITES

During the first quarter of 2017, the National Institute of Anthropology and History reported 6.8 million visitors, (-) 4.4% lower than reported in the same period of 2016. Of the total number of visitors, 76.8% corresponded to national visitors and the 23.2% to foreigners.

<table>
<thead>
<tr>
<th>January-March</th>
<th>Million visitors</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016</td>
<td>7.1</td>
<td></td>
</tr>
<tr>
<td>2017</td>
<td>6.8</td>
<td>-4.4%</td>
</tr>
</tbody>
</table>
Other Indicators
Based on the Quarterly Indicators of Tourism Activity, tourist GDP registered growth of 2.4% in the fourth quarter of 2016 compared to the same period of 2015, according to seasonally adjusted figures. By components, services grew 2.2% in annual terms and goods 4.3% in the same period.
### RESULTS OF TOURISM ACTIVITY, TABLE

<table>
<thead>
<tr>
<th>Subject</th>
<th>Unit of measurement</th>
<th>Year (January-December)</th>
<th>Change %</th>
<th>January-March</th>
<th>Change %</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>International travelers balance (Banco de México)</strong></td>
<td>Million dollars</td>
<td>13,949.0</td>
<td>16,208.4</td>
<td>17,733.7</td>
<td>19,570.8</td>
</tr>
<tr>
<td>Inbound traveler expenditures</td>
<td>Million dollars</td>
<td>13,949.0</td>
<td>16,208.4</td>
<td>17,733.7</td>
<td>19,570.8</td>
</tr>
<tr>
<td>Outbound traveler expenditures</td>
<td>Million dollars</td>
<td>9,122.4</td>
<td>9,605.8</td>
<td>10,098.1</td>
<td>10,226.9</td>
</tr>
<tr>
<td>International travelers balance</td>
<td>Million dollars</td>
<td>4,826.6</td>
<td>6,602.6</td>
<td>7,636.6</td>
<td>9,343.9</td>
</tr>
<tr>
<td><strong>International travelers to Mexico (Banco de México)</strong></td>
<td>Million dollars</td>
<td>84,409.0</td>
<td>107,972.4</td>
<td>128,575.6</td>
<td>145,976.3</td>
</tr>
<tr>
<td><strong>International visitors</strong></td>
<td>Thousand</td>
<td>78,102.8</td>
<td>81,452.7</td>
<td>87,125.6</td>
<td>94,621.0</td>
</tr>
<tr>
<td>International tourists</td>
<td>Thousand</td>
<td>24,150.5</td>
<td>29,345.6</td>
<td>32,093.3</td>
<td>34,960.8</td>
</tr>
<tr>
<td>Long-stay tourists</td>
<td>Thousand</td>
<td>9,586.6</td>
<td>13,345.7</td>
<td>13,786.1</td>
<td>14,536.6</td>
</tr>
<tr>
<td>Border tourists</td>
<td>Thousand</td>
<td>53,049.7</td>
<td>51,696.5</td>
<td>55,035.3</td>
<td>59,660.2</td>
</tr>
<tr>
<td>In border area travelers</td>
<td>Thousand</td>
<td>48,394.2</td>
<td>45,911.2</td>
<td>48,920.5</td>
<td>52,965.6</td>
</tr>
<tr>
<td>In cruises travelers</td>
<td>Thousand</td>
<td>4,555.4</td>
<td>5,785.2</td>
<td>6,114.8</td>
<td>6,694.6</td>
</tr>
<tr>
<td><strong>Border tourists</strong></td>
<td>Million dollars</td>
<td>565.2</td>
<td>556.5</td>
<td>574.3</td>
<td>529.8</td>
</tr>
<tr>
<td><strong>Arrival of tourists to hotel rooms</strong></td>
<td>Thousand</td>
<td>62,394.0</td>
<td>65,000.0</td>
<td>69,827.3</td>
<td>74,316.0</td>
</tr>
<tr>
<td><strong>Passenger in cruises</strong></td>
<td>Thousand</td>
<td>4,638.9</td>
<td>5,563.1</td>
<td>6,099.2</td>
<td>6,417.4</td>
</tr>
<tr>
<td><strong>Hotel business</strong></td>
<td><strong>SECTUR</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Percentage of hotel occupation</td>
<td>Percentage</td>
<td>55.6</td>
<td>57.1</td>
<td>59.6</td>
<td>60.3</td>
</tr>
<tr>
<td><strong>International tourists</strong></td>
<td>Thousand</td>
<td>62,394.0</td>
<td>65,000.0</td>
<td>69,827.3</td>
<td>74,316.0</td>
</tr>
<tr>
<td><strong>Inbound tourism consumption</strong></td>
<td>Annual percentages</td>
<td>0.8</td>
<td>2.1</td>
<td>5.0</td>
<td>2.4</td>
</tr>
<tr>
<td><strong>Goods</strong></td>
<td>Annual percentages</td>
<td>-4.3</td>
<td>-6.2</td>
<td>3.1</td>
<td>4.3</td>
</tr>
<tr>
<td><strong>Services</strong></td>
<td>Annual percentages</td>
<td>2.2</td>
<td>3.7</td>
<td>5.4</td>
<td>3.2</td>
</tr>
<tr>
<td><strong>International tourism consumption</strong></td>
<td>Annual percentages</td>
<td>1.4</td>
<td>0.9</td>
<td>6.1</td>
<td>4.8</td>
</tr>
<tr>
<td><strong>Domestic tourism consumption</strong></td>
<td>Annual percentages</td>
<td>0.8</td>
<td>-1.8</td>
<td>3.2</td>
<td>1.2</td>
</tr>
<tr>
<td><strong>Inbound tourism consumption</strong></td>
<td>Annual percentages</td>
<td>0.9</td>
<td>21.8</td>
<td>25.2</td>
<td>24.3</td>
</tr>
</tbody>
</table>

### Sources
- Bank of Mexico, ASA e INEGI, UPM, SCT, SECTUR.

### Notes
- 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.
- 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.

16/05/2017
# Mexico’s Key Economic Indicators

<table>
<thead>
<tr>
<th>Entity</th>
<th>Gross Domestic Product</th>
<th>Inflation</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2017</td>
<td>2018</td>
</tr>
<tr>
<td>International Monetary Fund</td>
<td>1.66</td>
<td>1.96</td>
</tr>
<tr>
<td>OCDE</td>
<td>2.27</td>
<td>2.37</td>
</tr>
<tr>
<td>Bank of Mexico Survey</td>
<td>1.66</td>
<td>2.12</td>
</tr>
<tr>
<td>Ministry of the Treasury and Public Credit</td>
<td>1.3 a 2.3</td>
<td>2.0 a 3.04</td>
</tr>
</tbody>
</table>

Source: [IMF](https://www.imf.org), World Economic Outlook Database (April 2017); [OECD](https://www.oecd.org), Economic Outlook (2017/03); [Bank of Mexico](https://www.banxico.gob.mx), Expectations Survey Economic Specialist Private Sector (02/05/17); [Ministry of Finance and Public Credit](https://www.gob.mx), Pre-General Criteria for Economic Policy 2018 (April, 2017)
## MACROECONOMIC INDICATORS, PROSPECTS

### Gross Domestic Product
- **Millions of current pesos**
  - 2011: 14,550,014
  - 2012: 15,626,907
  - 2013: 16,118,031
  - 2014: 17,258,964
  - 2015: 18,241,982
  - 2016: 19,522,652
- **Constant prices annual variations in %**
  - 2016/2011: 2.3
  - 2015/2011: 2.6
  - 2014/2011: 2.3
  - 2013/2011: 1.4
  - 2012/2011: 4.0

### Tertiary activities
- **Air Transportation (481)**
  - **Millions of current pesos**
    - 2011: 24,368
    - 2012: 27,720
    - 2013: 27,063
    - 2014: 34,708
    - 2015: 39,827
    - 2016: 50,112
  - **Constant prices annual variations in %**
    - 2016/2011: 4.04
    - 2015/2011: 1.42
    - 2014/2011: 0.3
    - 2013/2011: 2.62
    - 2012/2011: 7.3

- **Temporary Lodging Services (721)**
  - **Millions of current pesos**
    - 2011: 137,648
    - 2012: 151,099
    - 2013: 163,718
    - 2014: 179,525
    - 2015: 200,137
    - 2016: 219,572
  - **Constant prices annual variations in %**
    - 2016/2011: 2.4
    - 2015/2011: 8.2
    - 2014/2011: 5.6
    - 2013/2011: 6.0
    - 2012/2011: 5.6

- **Food and Beverages Preparation Services (722)**
  - **Millions of current pesos**
    - 2011: 160,238
    - 2012: 172,438
    - 2013: 177,145
    - 2014: 185,939
    - 2015: 208,668
    - 2016: 225,523
  - **Constant prices annual variations in %**
    - 2016/2011: 0.83
    - 2015/2011: 3.0
    - 2014/2011: -1.7
    - 2013/2011: -0.3
    - 2012/2011: 6.1

### Tourism GDP
- **Annual variations in %**
  - 2016/2015: 8.2
  - 2015/2014: 6.0
  - 2014/2013: 5.6
  - 2013/2012: 3.8
  - 2012/2011: 2.4

### Employment in the Tourism Sector (SECTUR)*
- **Employees insured by IMSS (average of the period)**
  - Total: 340,980
  - Permanent: 353,668
  - Non-permanent (urban and field): 36,292
- **Total Number of IMSS-Insured Workers**: 36,292
- **Exchange Rate (peso / dollar)**
  - 2016: 12.423
  - 2015: 13.169
  - 2014: 12.772
  - 2013: 13.292
  - 2012: 14.848
  - 2011: 15.894

### Tourism Employment
- **Total Percentage of PEA**
  - 2016: 0.060
  - 2015: 0.029
  - 2014: -0.028
  - 2013: 0.060
  - 2012: 0.057
  - 2011: 0.059

### National Price Index (closing of the period)
- **Consumer (percent variation)**
  - 2016: 3.8%
  - 2015: 3.6%
  - 2014: 4.0%
  - 2013: 4.1%
  - 2012: 4.2%
- **Air transport (percent variation)**
  - 2016: 6.4%
  - 2015: 1.1%
  - 2014: 3.1%
  - 2013: 4.8%
  - 2012: 4.2%
- **Package Tour Services (percent variation)**
  - 2016: 5.7%
  - 2015: 5.1%
  - 2014: 6.0%
  - 2013: 5.7%
  - 2012: 5.6%
- **Restaurants (percent variation)**
  - 2016: 4.4%
  - 2015: 4.2%
  - 2014: 3.6%
  - 2013: 6.0%
  - 2012: 4.9%
- **Exchange Rate (peso / dollar)**
  - 2016: 12,423
  - 2015: 13,169
  - 2014: 12,772
  - 2013: 13,292
  - 2012: 14,848

### Unemployment National Rate ** (closing of the period)
- **Total Percentage of PEA**
  - 2016: 4.51
  - 2015: 4.40
  - 2014: 4.89
  - 2013: 4.16
  - 2012: 4.33

### Prices and Exchange Rate***
- **Forward Indicator**
  - 2016: 0.027
  - 2015: 0.094

### Sources
- SECTUR, INEGI, STYPS, Bank of Mexico.

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* N.D. Not available.
** 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 consumer: at the end of the year are annual variations and same month previous year is for monthly data variation.
***** Joint monthly difference (closing of the period).

N.D. Not available
ECONOMIC CONTEXT

International

During the first quarter of 2017, signs of synchronized growth at the global level are beginning to be observed. Growth in advanced economies continued to moderate: although the US growth rate slowed compared to the previous quarter, private consumption performed strongly; The economies of the euro area maintained their growth rate, supported by domestic demand; and in Japan there was also sustained growth, due to increased external demand.

Economic activity in some emerging countries has shown signs of stability and moderate improvement. In Asia, China's economy continues to show steady growth, supported by expansive fiscal policies and strong credit growth. The Russian economy shows signs of recovery, registering positive growth for the first time since the first quarter of 2015. However, the Brazilian economy continues to recede, due to weak domestic demand and a fragile labor market.

National

In an external environment of uncertainty, Mexico's economy experienced a moderate positive performance during the first quarter of 2017. The favorable evolution of consumption, sales and employment stands out; the recovery of non-oil exports; and the stabilization of financial markets. With annual growth of 2.0 percent of the Global Economic Activity Indicator (IGAE) during the January-February 2017 bimester, available results reflect a resilient Mexican economy at the start of the year, mainly as a result of strong domestic dynamics.

Signals of more synchronized growth at the global level have been observed in recent months, following a prolonged episode of moderate and heterogeneous growth between regions, following the global economic and financial crisis of 2008-2009. Likewise, volatility in international financial markets has declined significantly. The International Monetary Fund estimates that global economic growth will increase to 3.5 percent by 2017, compared with the 3.1 percent growth observed in 2016.

Based on the information available to the first quarter of 2017, the growth rate established in the document known as "Pre-Criteria" for 2017, from 1.3 to 2.3 percent, is maintained.

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