Results of Tourism Activity

Mexico, April 2017

Undersecretariat of Planning and Tourism Policy

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

DIRECTORY

ENRIQUE DE LA MADRID CORDERO
MINISTER OF TOURISM

MARÍA TERESA SOLÍS TREJO
UNDERSECRETARY OF PLANNING AND TOURISM POLICY

DIRECTORATE-GENERAL OF INTEGRATION AND SECTORAL INFORMATION
integracion@sectur.gob.mx
monitoreodatatur@sectur.gob.mx

SECTUR
SECRETARÍA DE TURISMO

DATATUR 360
Análisis Integral del Turismo

INDEX

International Visitors to Mexico

SECTUR
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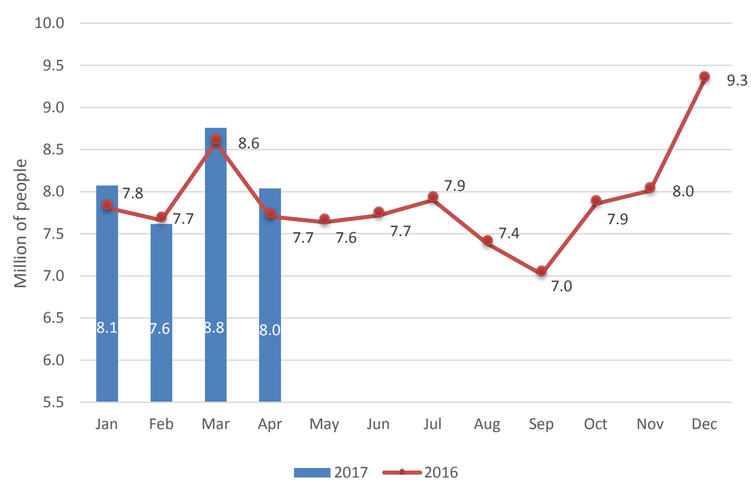
ARRIVAL OF INTERNATIONAL VISITORS

Chart 1. According to Bank of Mexico, during January-April 2017 the number of international visitors arriving to Mexico was 32.5 million, that is 727 thousand higher than January-April 2016 and equal to an increase of 2.3% in comparison to the same period of the previous year

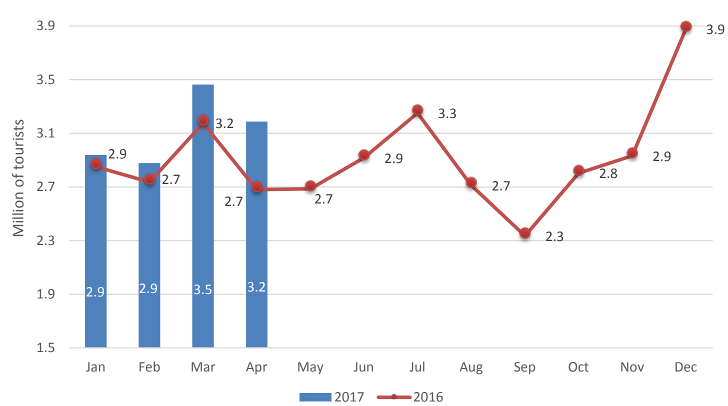
January-April	Million visitors	Change
2016	31.7	
2017	32.5	2.3%



ARRIVAL OF INTERNATIONAL TOURISTS

Chart 2. The arrival of international tourists in January-April 2017 was 12.5 million, reaching one million 23 thousand more than January-April 2016, an increase of 8.9% in comparison to the same period of the previous year.

January- April	Million passengers	Change
2016	11.4	
2017	12.5	8.9%



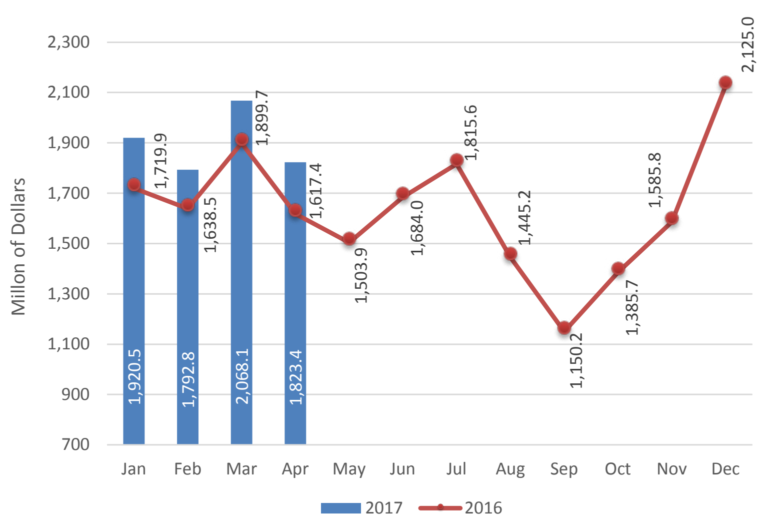
Note: In the graphs the sum of the data does not coincide with the accumulated period due to the rounding of figures.

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-April 2017 was 7,605 million dollars, equivalent to an increase of 10.6% in comparison to same period 2016.

January-April	Million dollars	Change
2016	6,875.5	
2017	7,604.8	10.6%

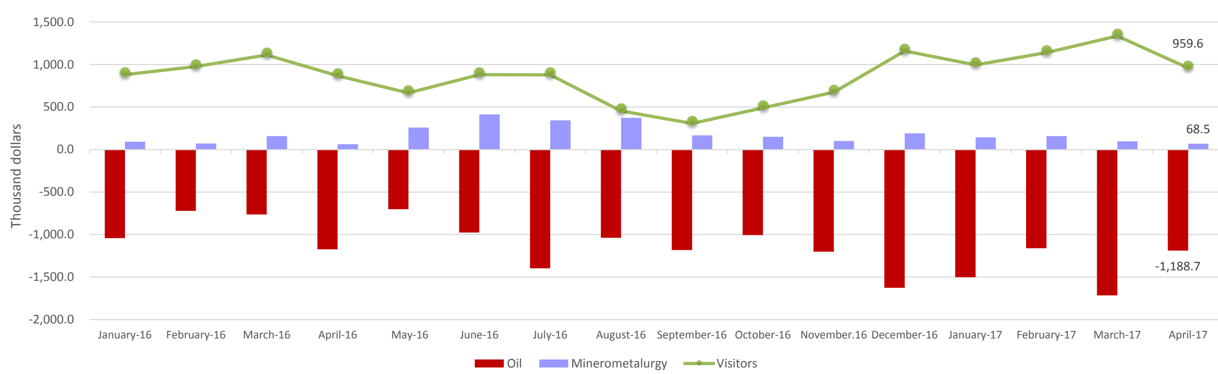


INTERNATIONAL TRAVELERS BALANCE

Chart 4. The balance by international visitors in January-April 2017 registered 4,428 million dollars, an increase of 15.4% in comparison to the same period in 2016.

January-April	Million dollars	Change
2016	3,836.1	
2017	4,428.0	15.4%

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.

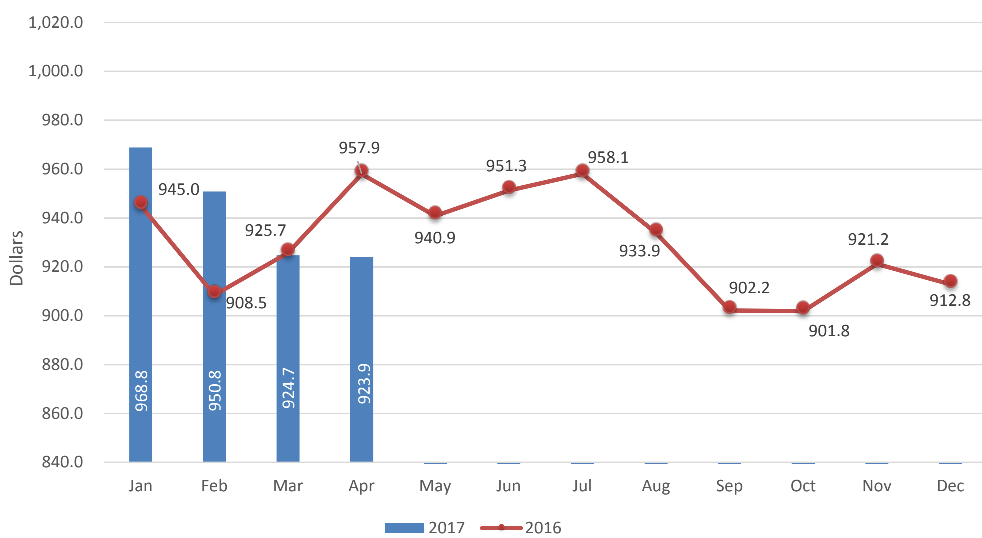
Source: Bank of Mexico, Balance of payments

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

AVERAGE EXPENDITURE OF LONG-STAY TOURISTS, AIR TRANSPORT

Chart 5. During January-April 2017, the average expenditure of long-stay tourists by air was 941.7 dollars, an increase of 0.9% in comparison to the same period in 2016.

January-April	Dollars	Change
2016	933.6	
2017	941.7	0.9%

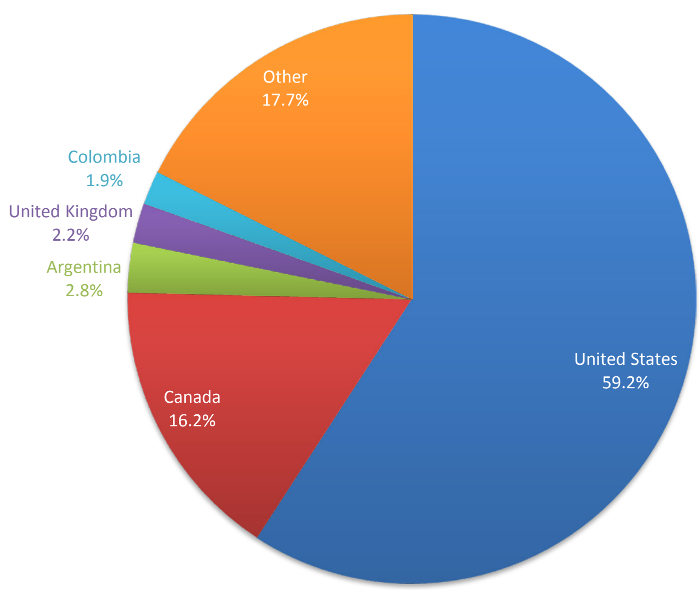


Source: Bank of Mexico, Balance of payments
http://www.datatur.sectur.gob.mx/SitePages/Visitantes%20Por%20Nacionalidad.aspx

Air Transportation

INTERNATIONAL VISITORS TO MEXICO ARRIVING BY AIR

Chart 6. In January-April 2017, the arrival of foreign air-coming visitors who reside in the United States represents 59.2% of all foreign arrivals by air. From Latin American and the Caribbean region the countries of residence with the highest number of foreign arrivals to Mexico were Argentina and Colombia, with 2.8% and 1.9% of total visitors respectively.

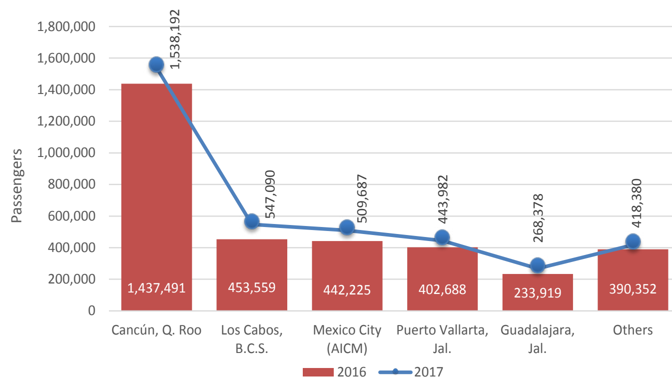


Note: In the graphs the sum of the data does not coincide with the accumulated period due to the rounding of figures

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

AMERICAN PASSENGERS PER AIRPORT

Chart 7. The American residents who arrived to Mexico by air increased 10.9% in January-April 2017 compared to the same period of 2016, registered three million 726 thousands passengers who arrived firstly at the Cancun Airport, followed by Los Cabos Airport.

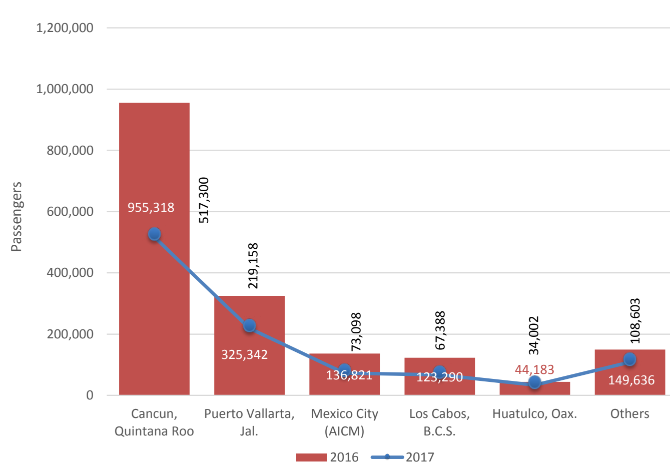


January-April	American passengers	Change
2016	3,360,234	
2017	3,725,709	10.9%

CANADIAN PASSENGERS PER AIRPORT

Chart 8. The number of Canadian residents who arrived to Mexico by air was 9.3% higher during January-April 2017 in comparison to the same period of last year. They firstly arrived at the Cancun Airport, followed by Puerto Vallarta Airport.

January-April	Canadian passengers	Change
2016	933,202	
2017	1,019.549	9.3%



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

MAIN AIRPORTS OF ARRIVAL

Figure 1. In January-April 2017 the airports with the highest number of foreign passengers were: Cancun (2,805,454); Mexico City (1,275,665); Puerto Vallarta (683,299); Los Cabos (622,953); Guadalajara (290,713) and Cozumel (88,642); which represents 91.6% of all foreign passengers.

INTERNATIONAL PASSENGERS
JANUARY- APRIL

	Baja California Sur	Jalisco		Mexico City	Quintana Roo	
	Los Cabos B.C.S.	Pto. Vallarta	Gdl.	Mexico City	Cancun	Cozumel
2016	529,599	609,225	251,856	1,071,687	2,606,045	88,018
2017	622,953	683,299	290,713	1,275,665	2,805,454	88,642
var	17.6%	12.2%	15.4%	19.0%	7.7%	0.7%

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.

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

Domestic Tourism

OCCUPANCY RATE

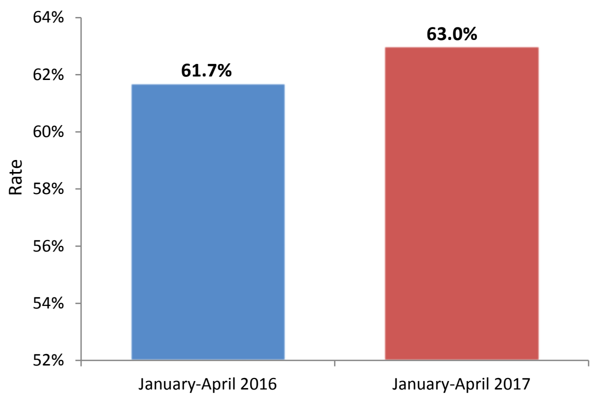


Chart 9. The percentage of hotel occupation in a group of 70 resorts during January-April 2017 reached 63%, 1.3 points higher in comparison to the same period of last year.

ARRIVAL OF TOURISTS TO HOTELS

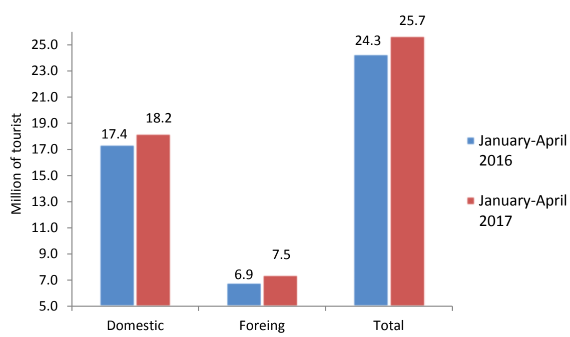
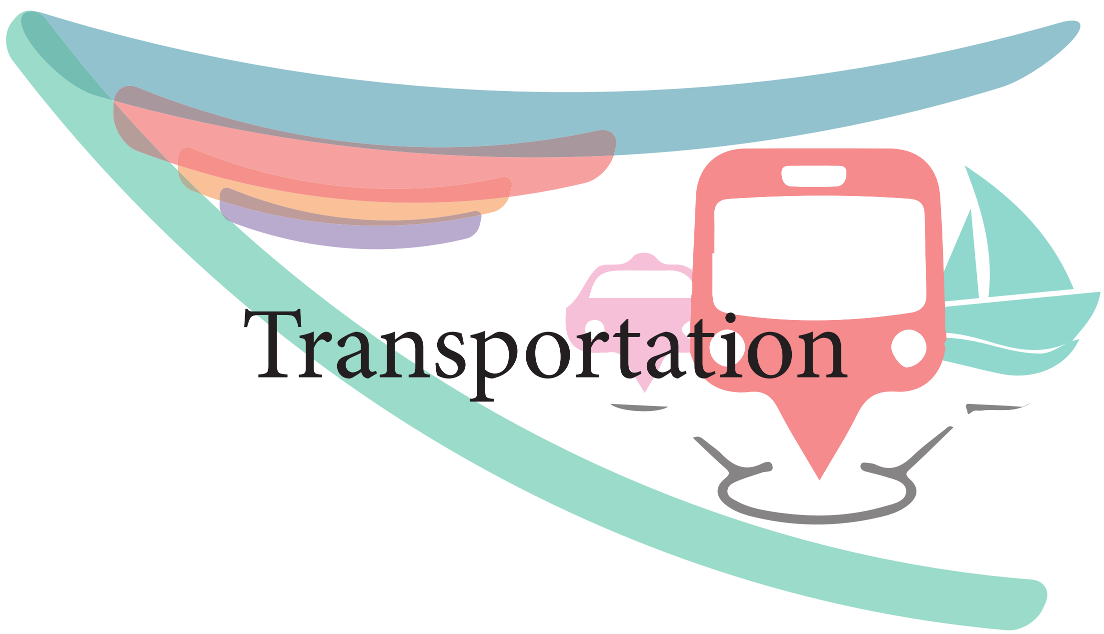


Chart 10. In January-April 2017, the arrival of domestic tourists to hotel rooms was 18.2 million tourists (71%), the remaining arrivals (29%) were from foreign tourists.

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.

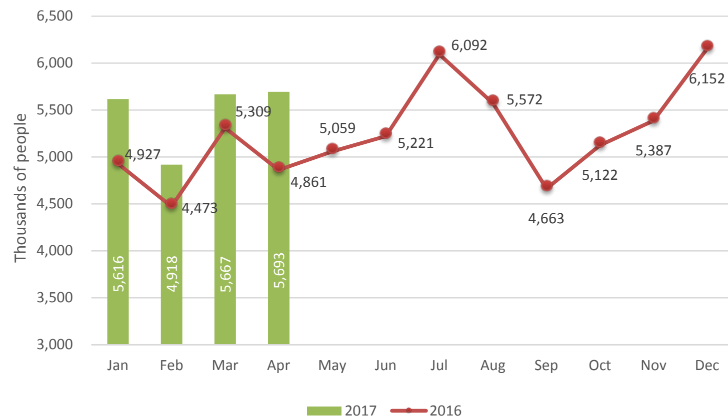
Source: Information of 70 resorts monitored by DataTur.
http://www.datatur.sectur.gob.mx/SitePages/ActividadHotelera.aspx



Transportation

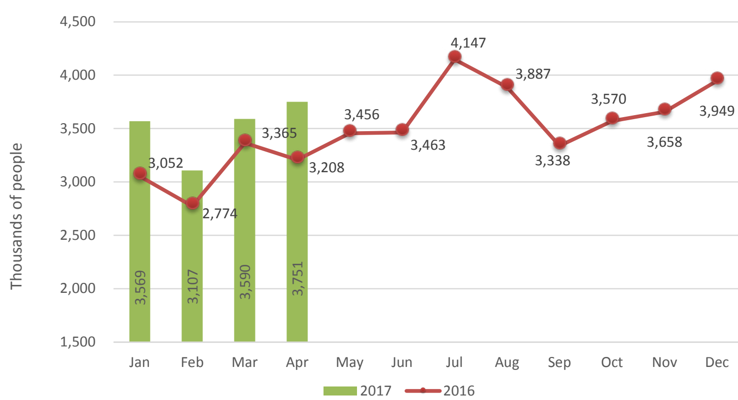
AIR TRANSPORTATION

Chart 11. The number of passengers arriving by air increased 11.9% in January-April 2017 in comparison to the same period last year, reaching 21.9 million passengers, equivalent to an increase of two million 324 thousand passengers.



January-April	Thousand passengers	Change
2016	19,570.4	
2017	21,894.2	11.9%

Chart 12. The number of passengers arriving by air on domestic flights in January-April 2017 was 14.0 million passengers, representing one million 619 thousand of additional passengers (13.1%), in comparison to the same period last year.

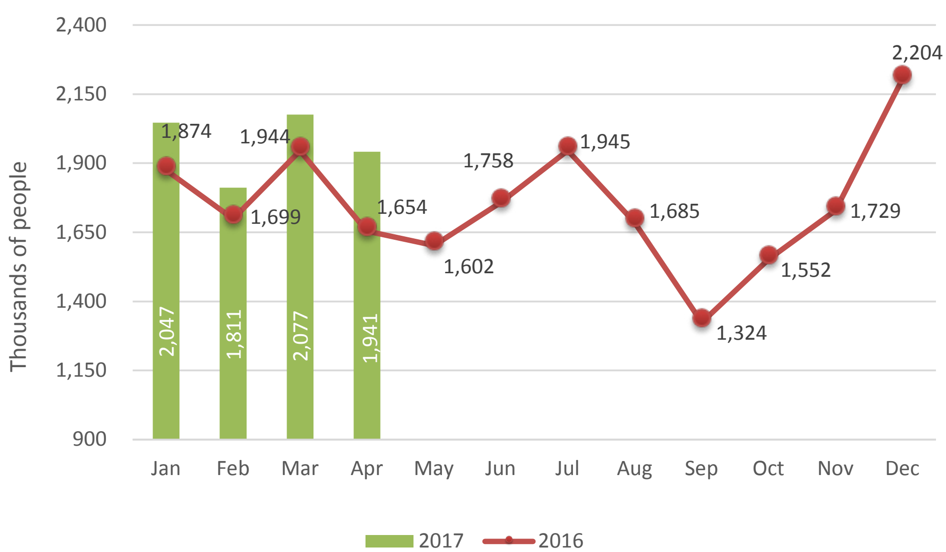


January-April	Thousand passengers	Change
2016	12,398.5	
2017	14,017.8	13.1%

Preliminary figures / Source: Airports and Auxiliary Services (SCT)
http://www.datatur.sectur.gob.mx/SitePages/TrasnAerea.aspx

Chart 13. In January-April 2017, the number of passengers arriving by air on international flights increased 9.8% with 7.8 million passengers, exceeding 704 thousand of passengers from January-April 2016.

January-April	Thousand passengers	Change
2016	7,171.9	
2017	7,876.3	9.8%



MARITIME TRANSPORTATION

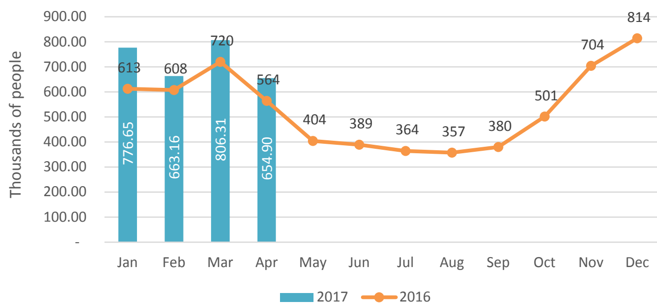


Chart 14. During January-April 2017, the number of cruise passengers reached two million 901 thousand, representing an increase of 396 thousand passengers (15.8%) in comparison to the same period 2016.

January-April	Thousand passengers	Change
2016	2,504.5	
2017	2,901.0	15.8%

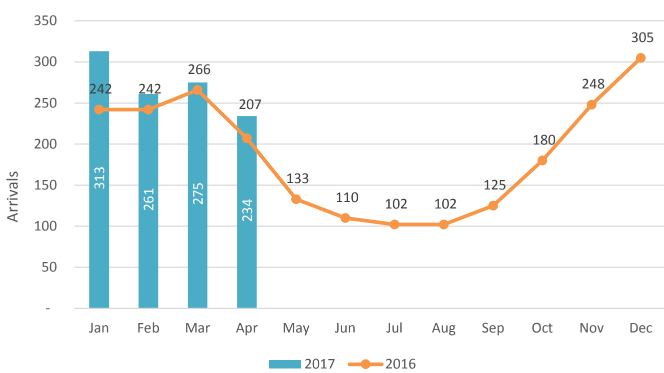


Chart 15. The number of cruise arrivals in January-April 2017 increased in 99, reaching one thousand and 83 cruises, an increase of 13.2% in comparison to the same period last year.

January-April	Arrivals	Change
2016	957	
2017	1,083	13.2%

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

MAIN PORTS

Figure 2. In January-April 2017 the ports that received the highest number of passengers were the following: Cozumel, Majahual and Ensenada; representing 77.2% of total arrivals in the month.

JANUARY-APRIL

Ensenada	arrivals	passengers
2016	90	232,392
2017	88	216,869
change	-2.2%	-6.7%

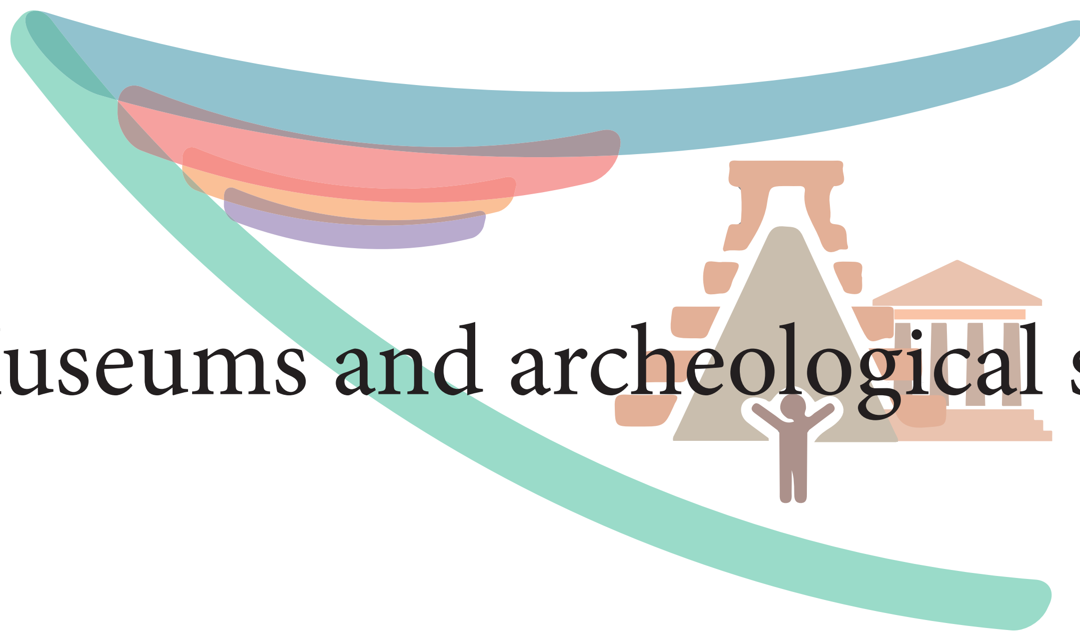
Cabo San Lucas	arrivals	passengers
2016	69	162,809
2017	80	174,016
change	15.9%	-6.7%

Puerto Vallarta	arrivals	passengers
2016	58	142,107
2017	63	150,252
change	8.6%	5.7%

Majahual	arrivals	passengers
2016	97	233,441
2017	140	392,506
change	44.3%	68.1%

Cozumel	arrivals	passengers
2016	478	1,444,397
2017	523	1,631,597
change	9.4%	13.0%

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



Museums and archeological sites

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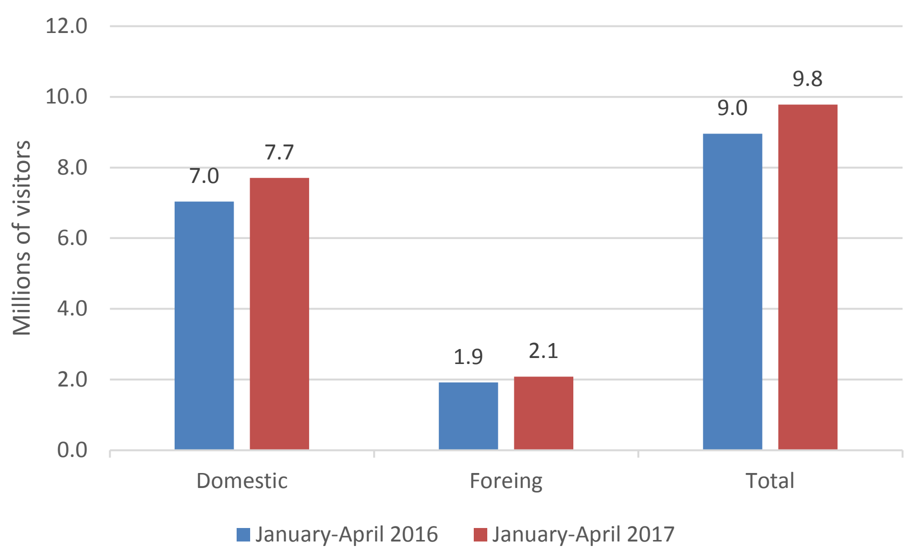
VISITORS TO MUSEUMS AND ARCHEOLOGICAL SITES

During January-April of 2017, the National Institute of Anthropology and History reported 9.8 million visitors, 9.3% higher than the number reported in the same period of 2016. Of the total number of visitors, 78.7% corresponded to national visitors and 21.3% to foreigners.

January-April	Million visitors	Change
2016	9.0	
2017	9.8	9.3%



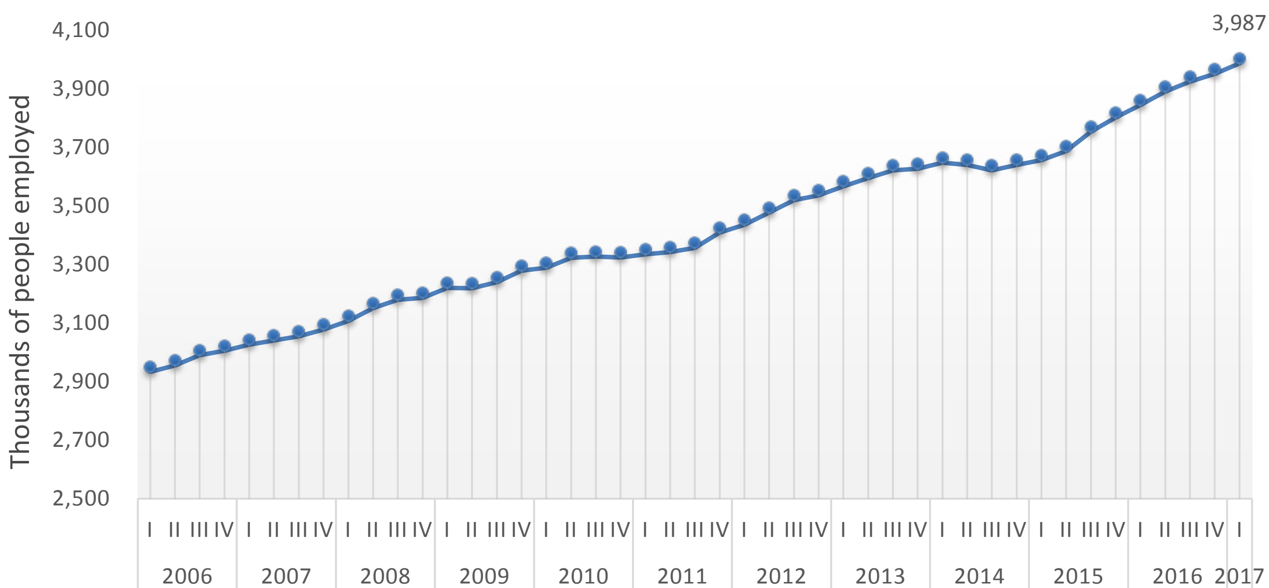
Source: National Institute of Anthropology and History (INAH)

Other Indicators

TOURIMS EMPLOYMENT

In the first quarter of 2017 around 3.9 million people were employed in the Mexican tourism sector, which accounted for 8.5% of the national employment. This represented a rise of 3.7% in comparison to the same quarter of the previous year.

First Quarter	Million of people employed	Change
2016	3.8	5.2%
2017	3.9	3.7%



Source: SECTUR

Note: Indirect or induced work is not included

RESULTS OF TOURISM ACTIVITY, TABLE

Subject	Unit of measurement	Year (January-December) 2013	2014	2015	2016	Change % 16/15	January-April 2016	2017	Change % 16/15
International travelers balance (Banco de México)									
Inbound traveler expenditures	Million dollars	13,949.0	16,208.4	17,733.7	19,570.8	10.4%	6,875.5	7,604.8	10.6%
Outbound traveler expenditures	Million dollars	9,122.4	9,605.8	10,098.1	10,226.9	1.3%	3,039.3	3,176.8	4.5%
International travelers balance	Million dollars	4,826.6	6,602.6	7,635.6	9,343.9	22.4%	3,836.1	4,428.0	15.4%
International travelers to Mexico (Banco de México)									
Number of travelers (Thousand)									
International visitors	Thousand	78,100.2	81,042.1	87,128.6	94,621.0	8.6%	31,761.1	32,488.2	2.3%
International tourists	Thousand	24,150.5	29,345.6	32,093.3	34,960.8	8.9%	11,444.8	12,468.3	8.9%
Long-stay tourists	Thousand	14,561.9	15,999.9	18,307.2	20,424.3	11.6%	6,902.1	7,579.5	9.8%
Border tourists	Thousand	9,588.6	13,345.7	13,786.1	14,536.6	5.4%	4,542.7	4,888.8	7.6%
Same-day travelers	Thousand	53,949.7	51,696.5	55,035.3	59,660.2	8.4%	20,316.3	20,019.9	-1.5%
In border area travelers	Thousand	49,394.2	45,911.2	48,920.5	52,965.6	8.3%	17,676.2	16,830.8	-4.8%
In cruises travelers	Thousand	4,555.4	5,785.2	6,114.8	6,694.6	9.5%	2,640.1	3,189.1	20.8%
Inbound travelers expenditure (Million dollars)									
International visitors	Million dollars	13,949.0	16,208.4	17,733.7	19,570.8	10.4%	6,875.5	7,604.8	10.6%
International tourists	Million dollars	11,853.8	14,320.0	15,825.7	17,621.9	11.4%	6,199.7	6,897.1	11.2%
Long-stay tourists	Million dollars	11,311.5	13,579.9	15,035.0	16,852.6	12.1%	5,954.4	6,625.4	11.3%
Border tourists	Million dollars	542.2	740.1	790.7	769.3	-2.7%	245.3	271.7	10.8%
Same-day travelers	Million dollars	2,095.2	1,888.4	1,908.0	1,948.9	2.1%	675.8	707.7	4.7%
In border area travelers	Million dollars	1,737.1	1,469.6	1,508.9	1,548.1	2.6%	516.9	516.6	-0.1%
In cruises travelers	Million dollars	358.1	418.8	399.2	400.8	0.4%	158.9	191.1	20.3%
Average expenditure (dollars)									
International visitors	Dollars	178.6	200.0	203.5	206.8	1.6%	216.5	234.1	8.1%
International tourists	Dollars	490.8	488.0	493.1	504.0	2.2%	541.7	553.2	2.1%
Long-stay tourists	Dollars	776.8	848.8	821.3	825.1	0.5%	862.7	874.1	1.3%
Border tourists	Dollars	56.5	55.5	57.4	52.9	-7.7%	54.0	55.6	2.9%
Same-day travelers	Dollars	38.8	36.5	34.7	32.7	-5.8%	33.3	35.3	6.3%
In border area travelers	Dollars	35.2	32.0	30.8	29.2	-5.2%	29.2	30.7	5.0%
In cruises travelers	Dollars	78.6	72.4	65.3	59.9	-8.3%	60.2	59.9	-0.4%
Arrival of passengers on domestic and international flights (ASA)									
Total Passengers arriving by air	Thousands	46,122.1	49,955.8	56,367.6	62,838.2	11.5%	19,570.4	21,894.2	11.9%
International flights	Thousands	15,703.3	17,125.6	19,279.3	20,971.7	8.8%	7,171.9	7,876.4	9.8%
Domestic flights	Thousands	30,418.8	32,830.2	37,088.3	41,866.6	12.9%	12,398.5	14,017.8	13.1%
Foreign visitors by air and country of residence (Unidad de Política Migratoria)									
United States of America	Thousands	6,630.3	7,348.5	8,604.6	9,643.9	12.1%	3,360	3,726	10.9%
Canada	Thousands	1,574.3	1,646.2	1,707.8	1,734.6	1.6%	933	1,020	9.3%
United Kingdom	Thousands	391.8	432.3	477.3	513.8	7.6%	142	142	0.0%
Argentina	Thousands	233.4	218.4	309.6	375.2	21.2%	138	176	28.2%
Colombia	Thousands	230.1	292.4	363.2	390.2	7.5%	96	122	27.0%
Movements cruise (SCT, Dirección General de Puertos)									
Passenger in cruices	Thousands	4,348.9	5,563.1	5,929.2	6,417.4	8.2%	2,504.5	2,901.0	15.8%
Cruise's arrivals	Number	1,622.0	2,091.0	2,180.0	2,262.0	3.8%	957.0	1,083.0	13.2%
Hotel business* (SECTUR)									
Percentaje of hotel accupation	Percentage	55.6	57.1	59.6	60.3	0.70	61.7	63.0	1.3
Arrival of tourists to hotel rooms	Thousands	62,394.0	65,000.0	69,827.3	74,316.0	6.4%	24,304.3	25,698.0	5.7%
Number of tourist jobs** (SECTUR based on ENOE)									
Tourism employment	Thousands	3,628.2	3,641.0	3,803.4	3,951.9	3.9%	3,845.1	3,987.4	3.7%
Quarterly Indicator of Tourism Activity*** (index 2008=100, seasonally adjusted series) INEGI.			Fourth Quarter						
Tourism GDP	Annual percentages	0.8	2.1	5.0	2.4	2.4	NA	NA	NA
Goods	Annual percentages	-4.3	-6.2	3.1	4.3	4.3	NA	NA	NA
Services	Annual percentages	2.2	3.7	5.4	3.2	3.2	NA	NA	NA
Internal tourism consumption	Annual percentages	1.4	0.9	6.1	4.8	4.8	NA	NA	NA
Domestic tourism consumption	Annual percentages	0.8	-1.8	3.2	1.2	1.2	NA	NA	NA
Inbound tourism consumption	Annual percentages	6.9	21.8	25.2	24.3	24.3	NA	NA	NA

* A report from the Hotel Occupancy monitored weekly in 70 centers. Changes in percentage points in the case of hotel occupancy. 15/06/2017

** 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

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

MEXICO'S KEY ECONOMIC INDICATORS

Entity	Gross Domestic Product Constant prices (percent change)		Inflation (% dec/dec)	
	2017	2018	2017	2018
International Monetary Fund	1.60	1.96	4.61	3.09
OECD	1.94	1.97	5.34	3.79
Banco de México Survey	1.97	2.18	5.90	3.88
Ministry of the Treasury and Public Credit	1.3 a 2.3	2.0 a 3.0	4.90	3.00

Source: **IMF**, World Economic Outlook Database (april2017); **OECD**, Economic Outlook (2016/10); **Bank of Mexico**, Expectations Survey Economic Specialist Private Sector (01/06/17); **Ministry of Finance and Public Credit**, General Criteria for Economic Policy 2018 (April, 2017).

SECTUR
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ESTADOS UNIDOS MEXICANOS

DATATUR 360
Análisis Integral del Turismo

MACROECONOMIC INDICATORS, PROSPECTS

Entries	2011	2012	2013	2014	2015	2016	2016.I	April 17
General Economic Activity and Services Identified with Tourism								
Gross Domestic Product								
. Millions of current pesos	14,550,014	15,626,907	16,118,031	17,259,799	18,261,422	19,539,870	20,603,884.5	
. Constant prices annual variations in %	4.0	4.0	1.4	2.3	2.6	2.3	2.8	
Tertiary activities								
- Air Transportation (481)								
. Millions of current pesos	24,368	27,720	27,063	34,708	39,827	50,112	42,294.2	
. Constant prices annual variations in %	-0.3	7.3	8.1	9.4	7.7	16.5	8.4	
- Temporary Lodging Services (721)								
. Millions of current pesos	137,648	151,099	163,718	179,525	200,137	219,572	238,130.6	
. Constant prices annual variations in %	2.4	8.2	5.6	6.0	5.6	3.8	1.5	
- Food and Beverages Preparation Services (722)								
. Millions of current pesos	160,238	172,438	177,145	185,939	208,668	225,523	221,911.5	
. Constant prices annual variations in %	0.8	3.0	-1.7	-0.3	6.1	3.8	-0.6	
Quarterly Indicators of Tourism Activity								
Tourism GDP								
. Annual variations in %	2.9	4.6	0.6	1.7	3.6	3.5		
Internal tourism consumption								
. Annual variations in %	1.8	2.9	0.9	0.9	4.5	5.9		
Domestic tourism consumption								
. Annual variations in %	2.9	2.3	1.0	-0.8	1.1	2.7		
Inbound tourism consumption								
. Annual variations in %	-6.2	7.8	0.5	14.7	28.8	24.0		
Tourism Employment								
People Employed in the Tourism Sector (SECTUR)*	3409804.1	3536686.1	3628194.7	3640970.3	3803441.7	3951886.8	3987429.8	
Total number of IMSS-Insure Workers								
Employees insured by IMSS (average of the period)	15,153,643	15,856,137	16,409,302	16,990,724	17,724,222	18,401,344	18,849,402	19,021,083
.Permanent	13,101,612	13,637,937	14,123,077	14,570,291	15,170,986	15,785,784	16,147,909	16,285,224
.Non-permanent (urban and field)	2,052,031	2,218,200	2,286,225	2,420,433	2,553,236	2,615,560	2,701,493	2,735,859
Unemployment National Rate ** (closing of the period)								
. Total Percentage of PEA	4.51	4.40	4.89	4.16	4.33	3.65	3.39	3.57
Prices and Exchange Rate***								
National Price Index (closing of the period)								
Consumer (percent variation)	3.8%	3.6%	4.0%	4.1%	2.1%	3.4%	5.4%	5.82%
. Air transport (percent variation)	7.6%	-7.7%	0.2%	16.7%	3.2%	9.8%	4.4%	17.92%
. Hotel (percent variation)	6.4%	1.1%	3.1%	4.8%	4.2%	7.8%	6.1%	9.51%
. Package Tourist Services (percent variation)	5.7%	1.6%	4.9%	5.1%	7.6%	6.4%	5.3%	18.50%
. Restaurants (percent variation)	4.4%	4.2%	3.6%	6.0%	4.9%	5.5%	6.4%	6.15%
Exchange Rate (peso / dollar)								
. Average of the period	12.423	13.169	12.772	13.292	15.848	18.664	19.407	18.758
Business Cycle Indicators and Consumer Confidence (montly difference****)								
. Coincident Indicator	0.060	-0.064	-0.031	0.029	-0.029	0.034	-0.021	ND
. Forward Indicator	0.027	0.094	0.006	-0.086	-0.077	-0.060	0.154	0.183
.Confidence Consumer Index	0.113	0.072	-0.266	0.057	0.063	-0.045	0.059	0.232

N.D. Not available.
* For 2016 figures for the third quarter.
** 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 the consumer: at the end of the year are annual variations and same month previos year is for monthly data variation.
***** Point monthly difference (closing of the period).
Sources: SECTUR, INEGI, STYPS, Bank of Mexico

ECONOMIC CONTEXT

International

Stronger business and consumer confidence, rising industrial production and recovering employment and trade flows will all contribute to an improvement in global GDP growth from 3.0% in 2016 to 3.6% in 2018, according to the Outlook.

Among the major advanced economies, the recovery will continue in the United States, which is projected to grow by 2.1% in 2017 and 2.4% in 2018. The euro area will see steady growth at 1.8% in 2017 and 2018. In Japan, growth is projected at 1.4% in 2017 and 1% in 2018. The 35-country OECD area is projected to grow by 2.1% in both 2017 and 2018, according to the Outlook.

The Outlook suggests that an integrated approach is needed to make globalisation work for all. This must include domestic policies to encourage opportunity, innovation and the creation of new firms, so as to yield economic growth that is both stronger than in the recent past and also more inclusive.

At the same time, more effective targeted policies are needed to support people and regions that risk getting left behind. Last but not least, countries must work together to fill gaps in the governance of the international economy. This will ensure a more level playing field, as well as more robust and implementable international standards across a range of areas including labour markets, the environment, corporate responsibility, governance and taxation.

National

After decelerating in late 2016, the pace of economic activity is projected to pick up somewhat, mainly reflecting stronger exports. Improved business confidence will support the upturn in investment. Consumer spending, the engine of growth in the past two years, will grow at a slower pace, as rising inflation damps consumers' purchasing power and credit conditions tighten.

At 6.75%, the monetary policy interest rate is at its highest level in eight years, and is projected to remain so to contain the transitory surge in inflationary pressures. Going forward, monetary policy should continue to consider all the determinants of inflation and its expectations, particularly the pass-through to other prices from exchange rate depreciation and gasoline price adjustment, as well as the relative monetary policy stance with the US and the output gap. To slow the rapid rise in public debt, fiscal consolidation is projected to continue.

The Mexican economy has benefitted from open borders, foreign direct investment inflows and integration in global value chains. Remaining barriers to foreign investment and services trade should be lifted to move up in global value chains, increase the diversification of exports and strengthen geographical linkages. However, certain locations and categories of workers have benefitted less from open borders than others. Improving education outcomes and reducing informality would help to spread the benefits of globalisation more widely.

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