



Results of Tourism Activity August 2018

Undersecretariat of Planning and Tourism Policy

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Main results published by INEGI for the period January-August 2018*

1. The arrival of international tourists was 27.8 million, exceeding one million 801 thousand tourists, this represented a growth of 6.9% in comparison to the same period of last year.
2. Foreign currency income from the arrival of international visitors was 15,380 million dollars equivalent to an increase of 4.7% in comparison to January-August 2017.
3. The amount of foreign currency that visitors residing in Mexico spent when going abroad was 7,376 million dollars, amount at 550 million dollars higher than that observed in January-August of 2017 and equivalent to an increase of 8.1%.
4. The international tourist departures of Mexico abroad amounted to 12 million 936 thousand, this is 972 thousand more tourists to the same period of last year, which represented a growth of 8.1%.
5. The balance by international visitors registered 8,004 million dollars, this represents an increase of 1.8% in comparison to January-August of 2017.

Other results:

6. The arrival of foreign air-coming visitors who reside in the United States represents 60.4% of all foreign arrivals by air transport. From the Latin American and the Caribbean region, the countries of residence with the highest number of foreign arrivals to Mexico were Argentina and Colombia, with 2.7% and 2.5% of total visitors respectively.
7. The percentage of hotel occupation in a group of 70 resorts reached 62.5%, level (-) 0.7 point lower compared to that observed in January-August of 2017.
8. The arrival of domestic tourists to hotel rooms was 40 million 535 thousand tourists (72.7%), the remaining arrivals 15 million 202 thousand (27.3%), were from foreign tourists.

* The International Travelers Survey is a project carried out at INEGI following the transfer process carried out in November 2017 by the Bank of Mexico, which has an operative lift as of August 1 of this year. . The update of the information will be on the 10th of each month (or the next business day).



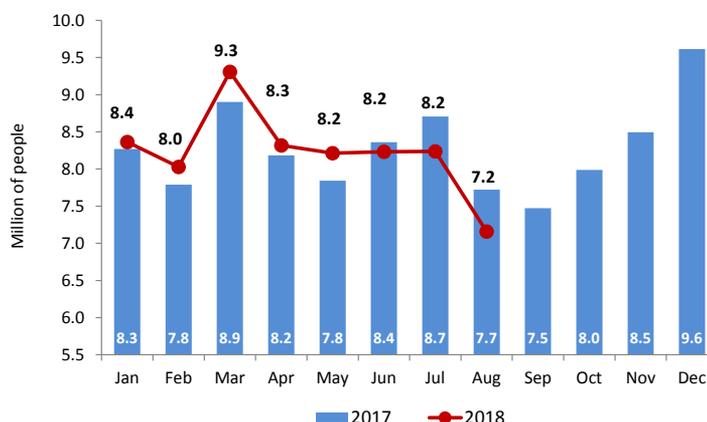
International Visitors to Mexico



ARRIVAL OF INTERNATIONAL VISITORS

Chart 1. According to the INEGI and Bank of Mexico, during January-August 2018, the number of international visitors arriving Mexico was **65.9 million**, that is 77 thousand visitors higher than January-August 2017 and represented a growth of 0.1% in comparison to the same period of 2017.

January-August	Million visitors	Change
2017	65.8	
2018	65.9	0.1%



ARRIVAL OF INTERNATIONAL TOURISTS

Chart 2. The arrival of international tourists in January-August 2018 was **27.8 million**, reaching one million 801 thousand more than the same period of 2017, increasing 6.9%.

January-August	Million tourists	Change
2017	25.9	
2018	27.8	6.9%



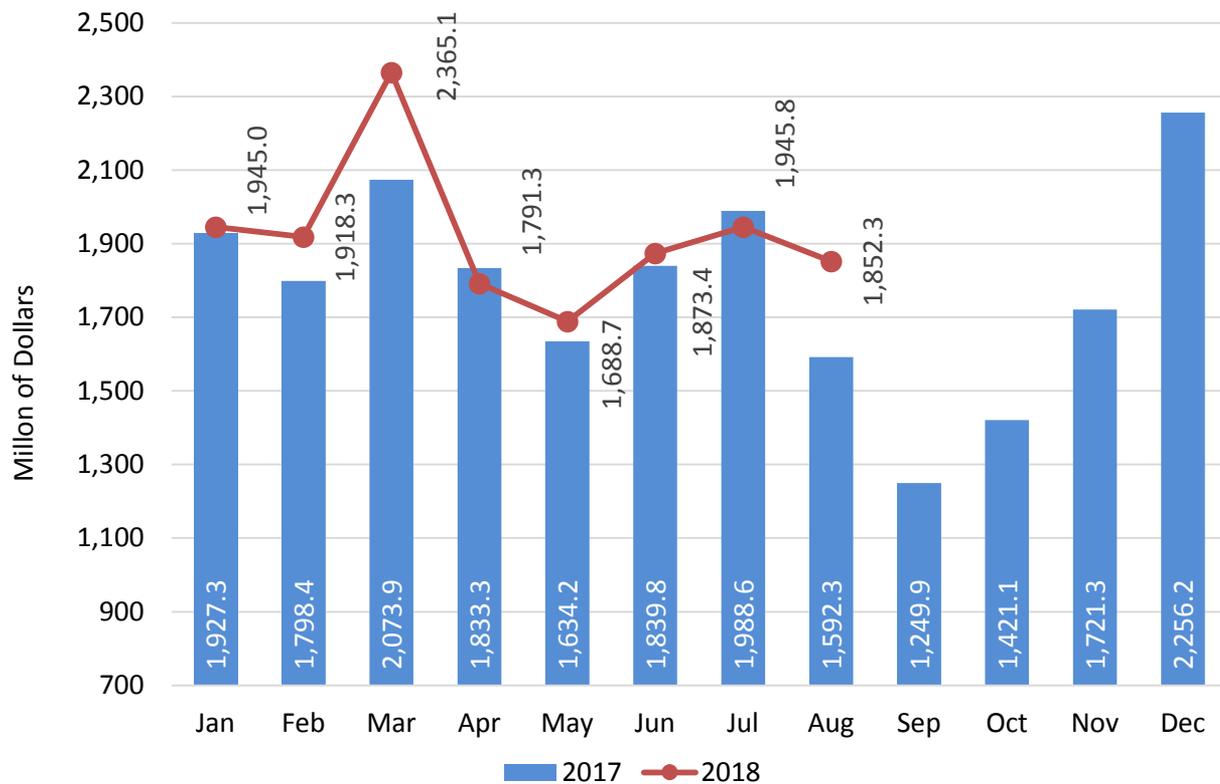
Note: In the graphs the sum of the data does not coincide with the accumulated period due to the rounding of figures.



INTERNATIONAL TRAVEL RECEIPTS

Chart 3. In January-August 2018, foreign currency income from the arrival of international visitors was **15,380 million dollars**, equivalent to an increase of 4.7% in comparison to the same period of 2017.

January-August	Million dollars	Change
2017	14,687.8	
2018	15,379.7	4.7%



Source: Bank of Mexico, Balance of payments

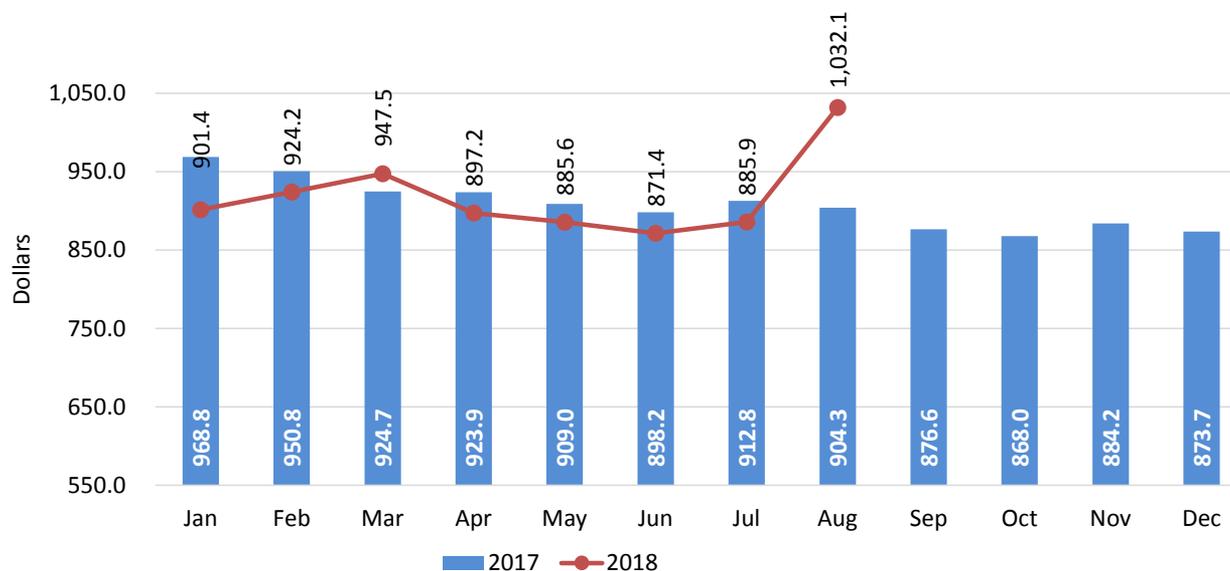
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AVERAGE EXPENDITURE OF LONG-STAY TOURISTS, AIR TRANSPORT

Chart 4. In January-August 2018, the average expenditure of long-stay tourists by air was **917.1 dollars**, this represents a decrease of (-) 0.8% in comparison to the same period of 2017.

January-August	Dollars	Change
2017	924.6	
2018	917.1	-0.8%



Source: Bank of Mexico, Balance of payments.

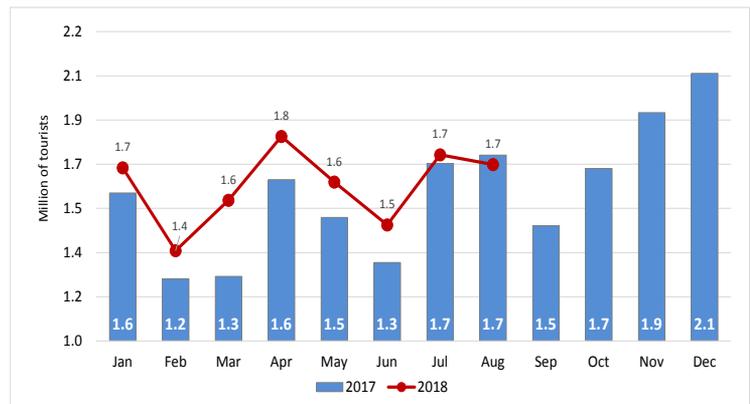
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DEPARTURES OF INTERNATIONAL TOURIST FROM MEXICO

Chart 5. According to INEGI and Bank of Mexico, during January-August 2018, the number of departures of international tourist from Mexico was **12 million 936 thousands**, that is 972 thousand more tourists than the same period of 2017 and represents a growth of 8.1%.

January-August	Million tourists	Change
2017	11.9	
2018	12.9	8.1%

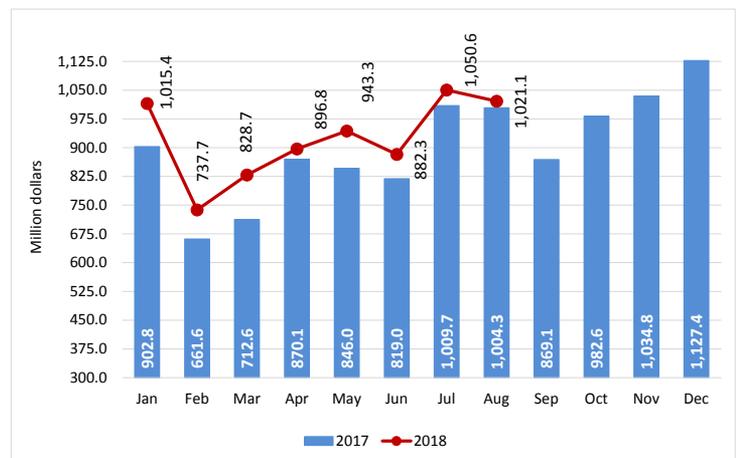


Note: In the graphs the sum of the data does not coincide with the accumulated period due to the rounding of figures.

SPENDING BY INTERNATIONAL VISITORS FROM MEXICO

Chart 6. In January-August 2018, foreign currency spent by visitors residing in Mexico when going abroad was **7,376 million dollars**, higher 550 million dollars to the observed in the same period of 2017 and equivalent to an annual increase of 8.1%.

January-August	Million dollars	Change
2017	6,826.1	
2018	7,376.0	8.1%



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



INTERNATIONAL TRAVELERS BALANCE

Chart 7. The balance by international visitors in January-August 2018, registered a surplus of **8,004 million dollars**, this represents an increase of 1.8% in comparison to the same period of 2017.

January-August	Million dollars	Change
2017	7,861.7	
2018	8,003.7	1.8%

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>

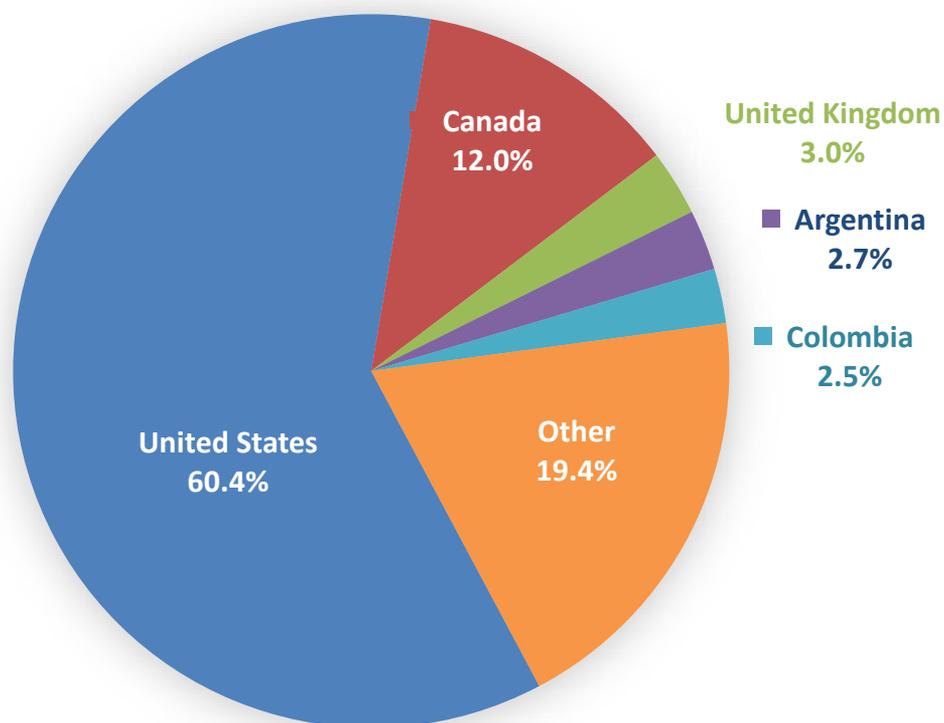


Air Transportation



INTERNATIONAL VISITORS TO MEXICO ARRIVING BY AIR

Chart 8. During January-August 2018, the arrival of foreign air-coming visitors who reside in the United States represents 60.4% of all foreign arrivals by air. From the Latin American and the Caribbean region, the countries of residence with the highest number of foreign arrivals in Mexico were Argentina and Colombia, with 2.7% and 2.5% of total visitors respectively.

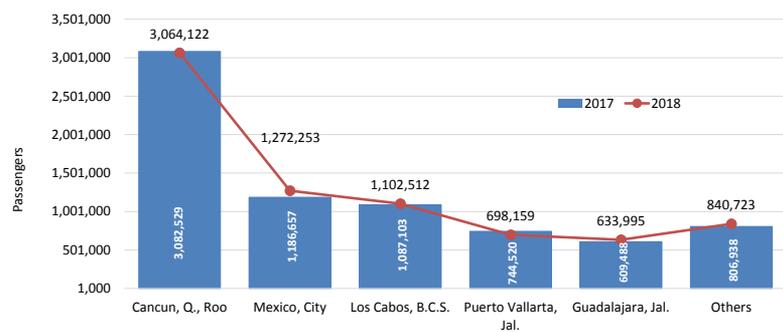


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AMERICAN PASSENGERS PER AIRPORT

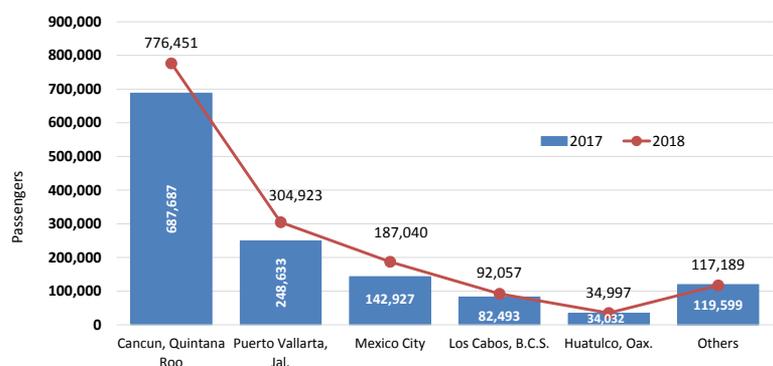
Chart 9. The American residents who arrived to Mexico by air increased 1.3% in January-August 2018 compared to the same period of 2017, registering **7 million 612 thousands passengers** who arrived firstly at the Cancun Airport, followed by Mexico City Airport.



January-August	American Passengers	Change
2017	7,517,246,	
2018	7,611,764	1.3%

CANADIAN PASSENGERS PER AIRPORT

Chart 10. In January-August 2018, the Canadian residents who arrived to Mexico by air was **15% higher** in comparison to the same period of 2017. They firstly arrived at the Cancun Airport, followed by Puerto Vallarta Airport.



January-August	Canadian passengers	Change
2017	1,315,823	
2018	1,512,657	15%



MAIN AIRPORTS OF ARRIVAL

Figure 1. In January-August 2018, the airports with the highest number of foreign passengers were: Cancun (5,543,813); Mexico City (2,991,521); Los Cabos (1,207,089); Puerto Vallarta (1,045,079); Guadalajara (686,689); Monterrey (171,047) and Cozumel (154,847); which represents 93.7% of all foreign passengers.



JANUARY-AUGUST 2018

Baja California Sur		Jalisco		Mexico City		Quintana Roo		Nuevo Leon			
Los Cabos B.C.S.		Pto. Vallarta	Guadalajara	Mexico City		Cancun	Cozumel	Monterrey			
2017	1,183,874	2017	1,028,224	655,600	2017	2,732,949	2017	5,345,855	155,576	2017	172,437
2018	1,207,089	2018	1,045,079	686,689	2018	2,991,521	2018	5,543,813	154,847	2018	171,047
Change	2%	Chnage	1.6%	4.7%	Change	9.5%	Change	3.7%	-0.5%	Change	-0.8%

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.



Domestic Tourism



OCCUPANCY RATE

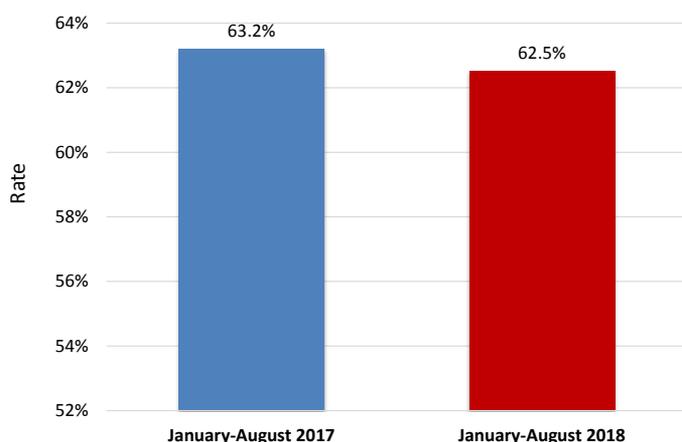


Chart 11. The percentage of hotel occupation in a group of 70 resorts during January-August 2018, reached **62.5%**, level (-) **0.7 point higher** in comparison to 63.2% of January-August 2017.

ARRIVAL OF TOURISTS TO HOTELS

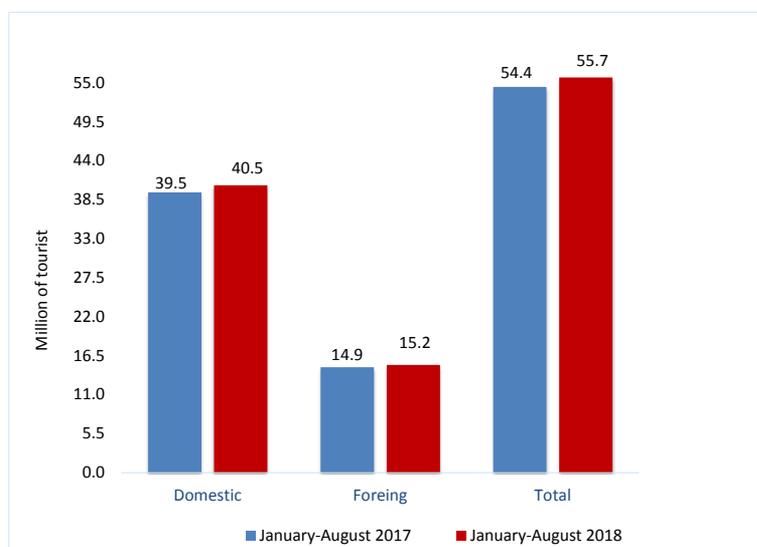


Chart 12. In January-August 2018, the arrival of domestic tourists to hotel rooms was **40.5 million tourists** (72.7%), the remaining arrivals (27.3%) were from foreign tourists.

Notes: Total occupancy is a weighted average of the 70 destinations monitored. The total arrivals of tourists to hotel rooms registered an increase of X.X%, compared to January-August 2017.

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



Transportation



AIR TRANSPORTATION

Chart 13. In January-August 2018, the number of passengers arriving by air increased 8.1% in comparison to the same period of 2017, reaching **49 million 503 thousand passengers**, equivalent to an increase of 3 million 706 thousand passengers.

January-August	Thousand passengers	Change
2017	45,797.0	
2018	49,502.5	8.1%

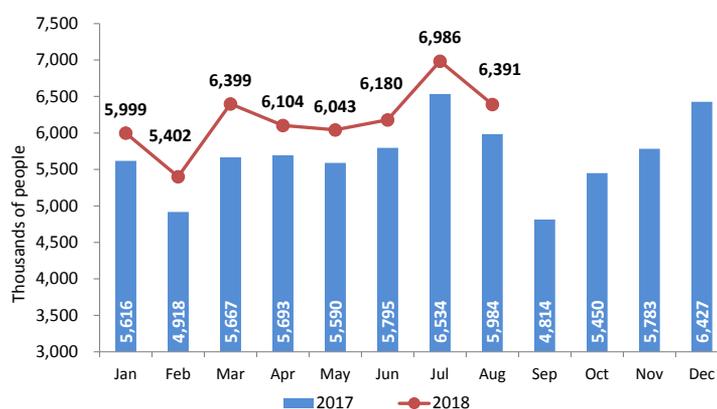


Chart 14. During January-August 2018, the number of passengers arriving by air on domestic flights was **32 million 899 thousand passengers**, representing 2 million 685 thousand passengers (8.9%) more than the same period of previous year.

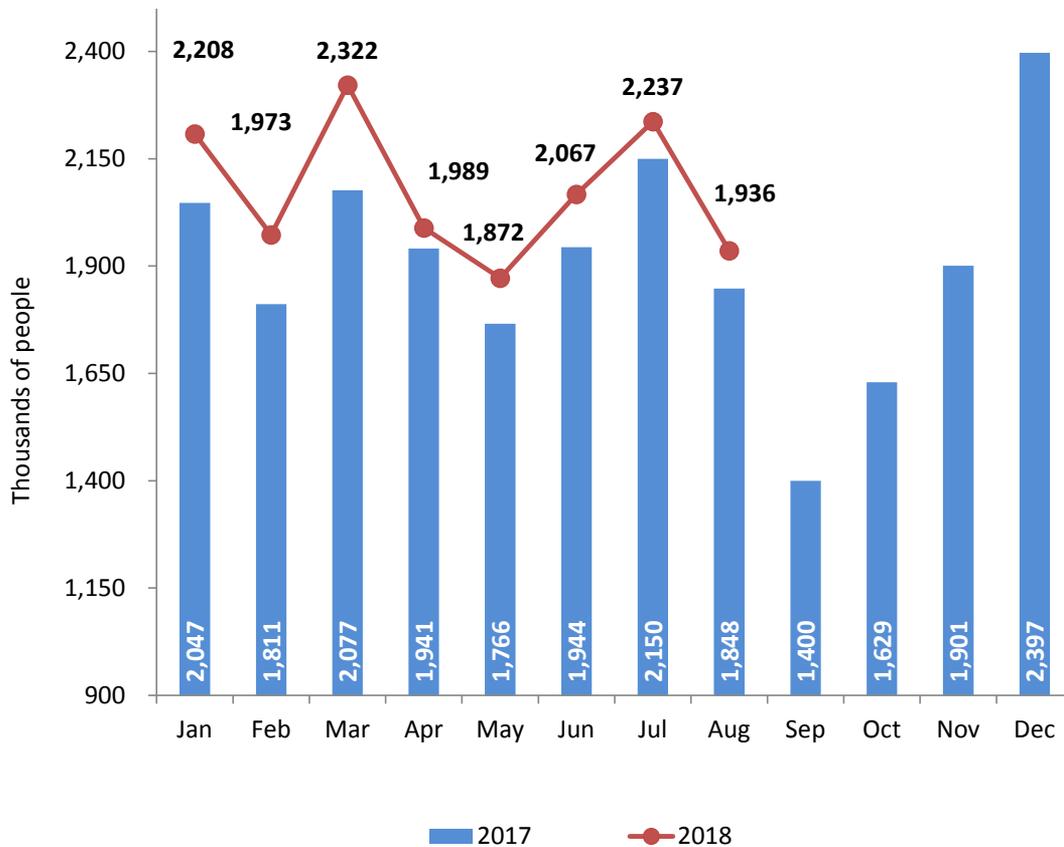
January-August	Thousand passengers	Change
2017	30,213.4	
2018	32,898.5	8.9%





Chart 15. In January-August 2018, the number of passengers arriving by air on international flights increased 6.5%, reaching **16 million 604 thousand passengers**, exceeding by one million 20 thousand passengers than the same period of 2017.

January-August	Thousand passengers	Change
2017	15,583.6	
2018	16,604.1	6.5%





MARITIME TRANSPORTATION

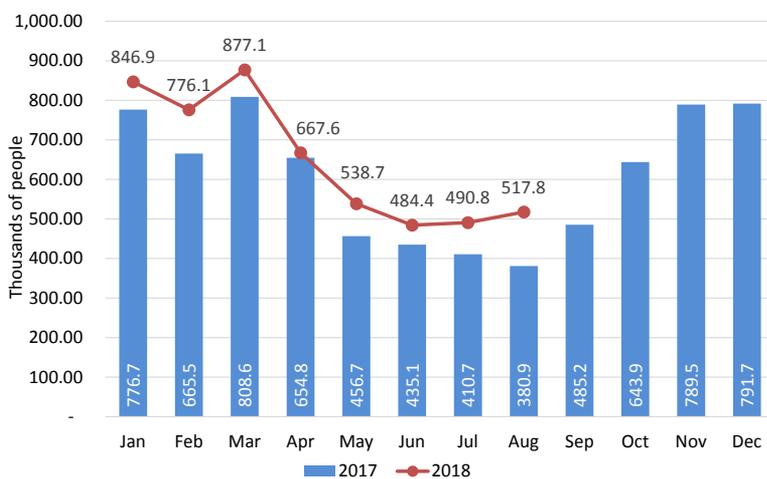


Chart 16. In January-August 2018, the number of cruise passengers reached **5 million 199 thousand passengers**, this representing an increase of 610 thousand passengers (13.3%) compared to the same period of previous year

January-August	Thousand Passengers	Change
2017	4,589	
2018	5,199	13.3%

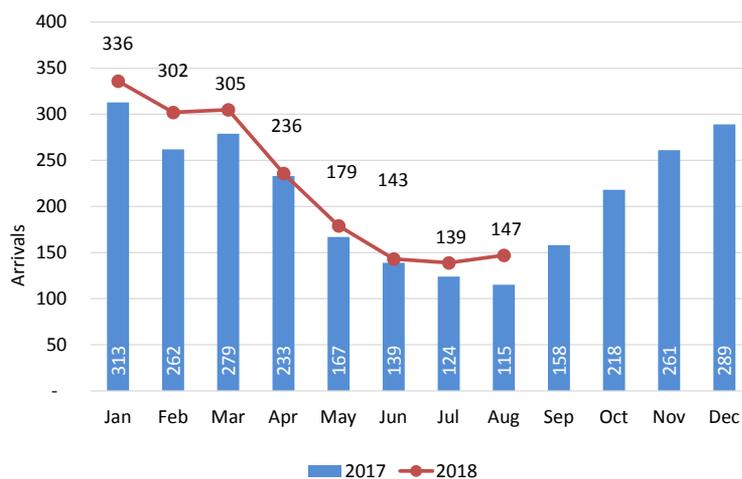


Chart 17. The number of cruise arrivals during January-August 2018, was **one thousand 787 cruises**, compared to the previous year, increased in 155 cruises that represents a 9.5%.

January-August	Arrivals	Change
2017	1,632	
2018	1,787	9.5%



MAIN PORTS

Figure 2. In January-August 2018, the ports that received the highest number of passengers were the following: Cozumel, Majahual and Ensenada; representing 79.3% of the total arrivals of January-August .



JANUARY-AUGUST 2018

Ensenada, B.C.			Cabo San Lucas, B.C.S.			Progreso, Yuc.			Majahual, Q. Roo			Cozumel, Q. Roo		
arrivals passengers			arrivals passengers			arrivals passengers			arrivals passengers			arrivals passengers		
2017	168	413,230	2017	112	236,947	2017	83	263,323	2017	200	579,626	2017	810	2,654,498
2018	171	429,393	2018	110	260,356	2018	103	310,718	2018	257	812,576	2018	866	2,881,448
Change	1.8%	3.9%	Change	-1.8%	9.9%	Change	24.1%	18%	Change	28.5%	40.2%	Change	6.9%	8.5%



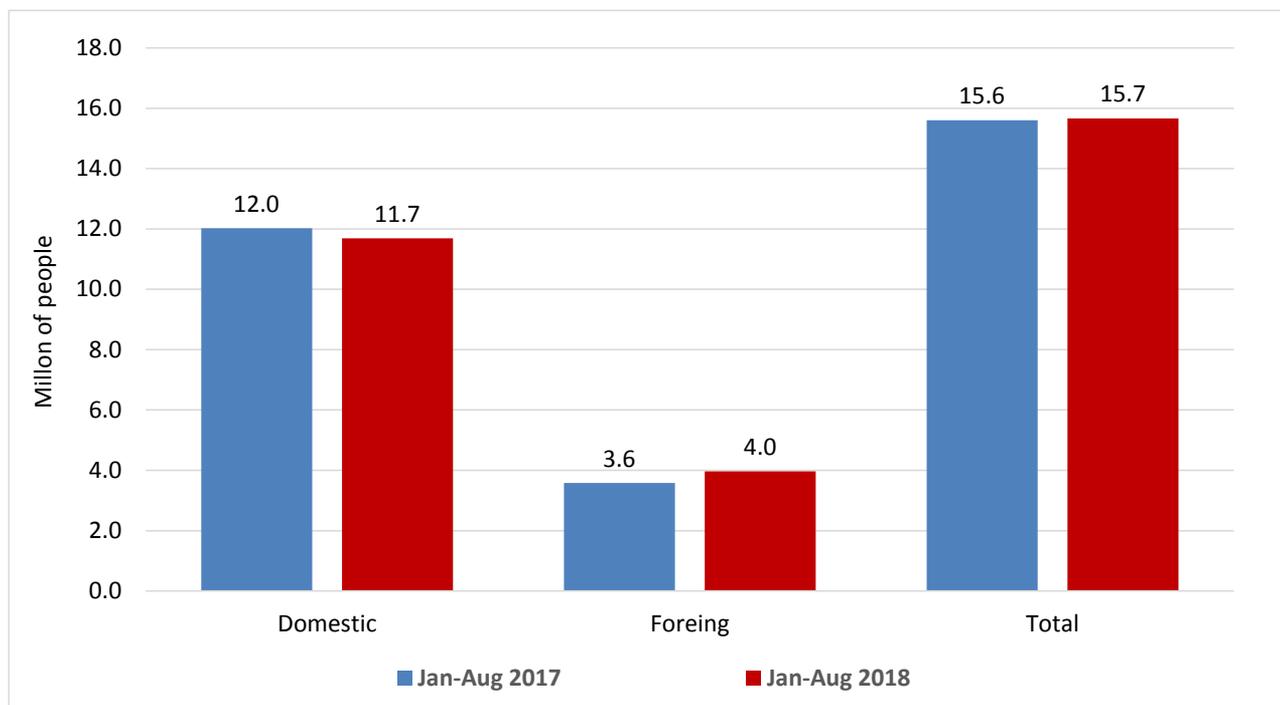
Museums and archeological sites



VISITORS TO MUSEUMS AND ARCHEOLOGICAL SITES

Chart 18. The National Institute of Anthropology and History, in January-August 2018, reported **18 million 165 thousand visitors**, 0.7% more than reported in the same period of the previous year. Of the total number of visitors, 74.7% corresponded to national visitors and the 25.3% to foreigners.

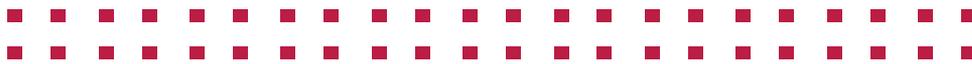
January-August	Thousand visitors	Change
2017	18,043.5	
2018	18,165.1	0.7%



Source: National Institute of Anthropology and History (INAH)



Other Indicators



RESULTS OF TOURISM ACTIVITY

Entity	Gross Domestic Product		Inflation	
	Real growth %		(% dec/dec)	
	2018	2019	2018	2019
International Monetary Fund	2.19	2.52	4.77	3.62
OCDE	2.20	2.50	3.86	3.41
Banco de México Survey	2.13	2.17	4.56	3.80
Ministry of the Treasury and Public Credit	2.0 a 3.0	2.5 a 3.5	3.50	3.00

Source: **IMF**, World Economic Outlook Database (November 2018); **OECD**, Economic Outlook (2018/09); **Bank of Mexico**, Expectations Survey Economic Specialist Private Sector (10/01/18); **Secretaría de Hacienda y Crédito Público**, Pre- General Critería 2019.



MACROECONOMIC INDICATORS, PROSPECTS

Entity	Gross Domestic Product		Inflation	
	Real growth %		(% dec/dec)	
	2018	2019	2018	2019
International Monetary Fund	2.19	2.52	4.77	3.62
OCDE	2.20	2.50	3.86	3.41
Banco de México Survey	2.13	2.17	4.56	3.80
Ministry of the Treasury and Public Credit	2.0 a 3.0	2.5 a 3.5	3.50	3.00

Source: IMF, World Economic Outlook Database (November 2018); OECD, Economic Outlook (2018/09); Bank of Mexico, Expectations Survey Economic Specialist Private

Sector (10/01/18); Secretaría de Hacienda y Crédito Público, Pre- General Criteria 2019.



MEXICO'S KEY ECONOMIC INDICATORS

Entries	2016	2017Q1	2017Q2	2017Q3	2017.QIV	2017	2018Q1	2018Q2	jul-18	ago-18
General Economic Activity and Services Identified with Tourism										
Gross Domestic Product										
. Millions of current pesos	20,115,786	21,152,197	21,657,546	21,599,336	22,732,004	21,785,271	22,536,162	23,450,949		
. Constant prices annual variations in %	2.9	3.3	1.8	1.6	1.5	2.0	1.4	2.6		
Tertiary activities										
- Air Transportation (481)										
. Millions of current pesos	40,976	37,296	50,054	45,685	48,836	45,468	40,657	51,000		
. Constant prices annual variations in %	9.1	7.1	17.0	10.5	6.7	10.4	14.8	10.4		
- Temporary Lodging Services (721)										
. Millions of current pesos	226,194	245,111	258,503	254,050	249,943	251,902	266,520	266,711		
. Constant prices annual variations in %	3.9	1.3	9.9	5.8	3.7	5.1	5.6	0.5		
- Food and Beverages Preparation Services (722)										
. Millions of current pesos	234,031	236,487	251,533	258,673	265,873	253,141	248,440	260,231		
. Constant prices annual variations in %	3.2	-1.2	4.9	5.1	5.2	3.5	0.7	-0.5		
Quarterly Indicators of Tourism Activity										
Tourism GDP										
. Annual variations in %	4.2	3.0	5.6	3.0	1.9	3.4	2.1			
Internal tourism consumption										
. Annual variations in %	4.0	4.2	5.2	2.3	1.2	3.2	2.4			
Domestic tourism consumption										
. Annual variations in %	0.7	1.7	4.9	2.9	1.8	2.8	3.8			
Inbound tourism consumption										
. Annual variations in %	24.0	16.0	6.4	0.9	-1.5	5.0	-3.4			
Tourism Employment										
People Employed in the Tourism Sector (SECTUR)*	3,951,887	3,987,430	4,030,762	4,063,315	4,095,282	4,095,282	4,111,028	4,129,760		
Total number of IMSS-Insure Workers										
Employees insured by IMSS (average of the period)	18,401,344	18,849,402	19,067,655	19,298,001	19,599,373	19,203,608	19,671,887	19,892,251	19,949,244	20,063,433
. Permanent	15,785,784	16,147,909	16,361,089	16,567,184	16,777,915	16,463,524	16,815,780	17,025,166	17,085,693	17,254,552
. Non-permanent (urban and field)	2,615,560	2,701,493	2,706,567	2,730,817	2,821,458	2,740,084	2,856,107	2,867,085	2,863,551	2,808,881
Unemployment National Rate ** (closing of the period)										
. Total Percentage of PEA	3.54	3.39	3.46	3.55	3.35	3.35	3.14	3.34	3.35	
Prices and Exchange Rate***										
National Price Index (closing of the period)										
Consumer (percent variation)	3.4%	5.4%	6.3%	6.3%	6.8%	6.8%	5.0%	4.6%	4.8%	4.9%
. Air transport (percent variation)	9.8%	4.4%	4.5%	-8.3%	2.8%	2.8%	-6.0%	-1.0%	-5.5%	-8.4%
. Hotel (percent variation)	6.4%	5.3%	6.3%	4.4%	4.2%	4.2%	8.0%	5.7%	0.7%	1.3%
. Package Tourist Services (percent variation)	5.3%	6.0%	6.0%	6.1%	6.0%	6.0%	5.6%	5.0%	4.9%	4.9%
. Restaurants (percent variation)	7.8%	6.1%	7.5%	6.2%	7.2%	7.2%	6.1%	4.9%	5.8%	5.2%
Exchange Rate (peso / dollar)										
. Average of the period	18.664	20.387	18.578	17.819	18.921	18.927	18.772	19.382	19.117	18.809
Business Cycle Indicators and Consumer Confidence (monthly difference****)										
. Coincident Indicator	0.028	-0.038	-0.061	-0.031	0.019	0.019	0.002	-0.018	-0.016	ND
. Forward Indicator	-0.057	0.144	0.129	0.007	0.011	0.011	-0.021	0.026	0.074	0.103
. Confidence Consumer Index	-0.122	0.170	0.202	0.038	-0.074	-0.074	0.163	0.573	0.628	0.564

N.A. Not available.

Nota: La suma de los datos mensuales no coincide con el acumulado del periodo, debido al redondeo de cifras.

* For 2016 figures for IV 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 previous year is for monthly data variation.

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

Sources: SECTUR, INEGI, STYPS, Bank of Mexico.



ECONOMIC CONTEXT

International

The steady expansion under way since mid-2016 continues, with global growth for 2018–19 projected to remain at its 2017 level. At the same time, however, the expansion has become less balanced and may have peaked in some major economies. Downside risks to global growth have risen in the past six months and the potential for upside surprises has receded.

Global growth is projected at 3.7 percent for 2018, 0.2 percentage point lower for both years than forecast in April. In the United States, momentum is still strong as fiscal stimulus continues to increase, but the forecast for 2019 has been revised down due to recently announced trade measures, including the tariffs imposed on \$200 billion of US imports from China.

Growth projections have been marked down for the euro area and the United Kingdom, following surprises that suppressed activity in early 2018. Among emerging market and developing economies, the growth prospects of many energy exporters have been lifted by higher oil prices, but growth was revised down for Argentina, Brazil, Iran, and Turkey, among others, reflecting country-specific factors, tighter financial conditions, geopolitical tensions, and higher oil import bills. China and a number of Asian economies are also projected to experience somewhat weaker growth in 2019 in the aftermath of the recently announced trade measures.

Risks to global growth skew to the downside in a context of elevated policy uncertainty. Several of the downside risks highlighted in the April 2018 World Economic Outlook (WEO)—such as rising trade barriers and a reversal of capital flows to emerging market economies with weaker fundamentals and higher political risk—have become more pronounced or have partially materialized.

Domestic

The IMF carried out a deep reassessment for emerging markets as a group, where its calculations indicate that growth will weaken in Latin America (especially Argentina, Brazil, Mexico), the Middle East (especially Iran) and emerging economies in Europe (especially Turkey).

These more moderate growth numbers and the weaker incoming data that underpin them owe, in part, to a sharp rise in policy uncertainty over the past year—a development yet to be reflected in advanced economy financial markets but evident in news-based uncertainty measures. Uncertainty over trade policy is prominent in the wake of US actions (or threatened actions) on several fronts, the responses by its trading partners, and a general weakening of multilateral consultation on trade issues.

While the preliminary agreement between the United States and Mexico on some bilateral trade issues has been a step forward, the future of the trilateral North American Free Trade Agreement (NAFTA) remains uncertain as the United States and Canada work to resolve remaining issues.