



TOURISM

KEY INDICATORS (JAN-NOV 2024)





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INTERNATIONAL TOURISM

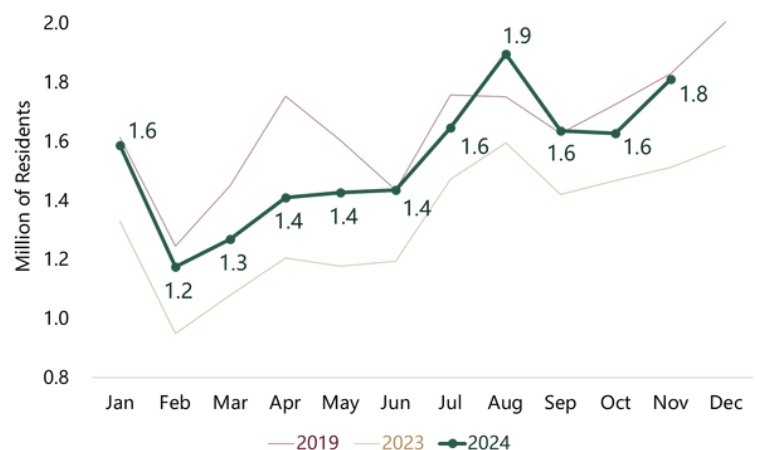
INTERNATIONAL TOURISTS TO MEXICO

International tourist arrivals totaled **40.249 million** from January to November 2024, an increase of **2.890 million** tourists, or **7.7%**, compared to the same period in 2023..



DEPARTURE OF RESIDENTS IN MEXICO ABROAD

From January to November 2024, **16.934 million** international tourists departed Mexico, representing an increase of **2.519 million** tourists, or **17.5%**, compared to the same period in 2023.



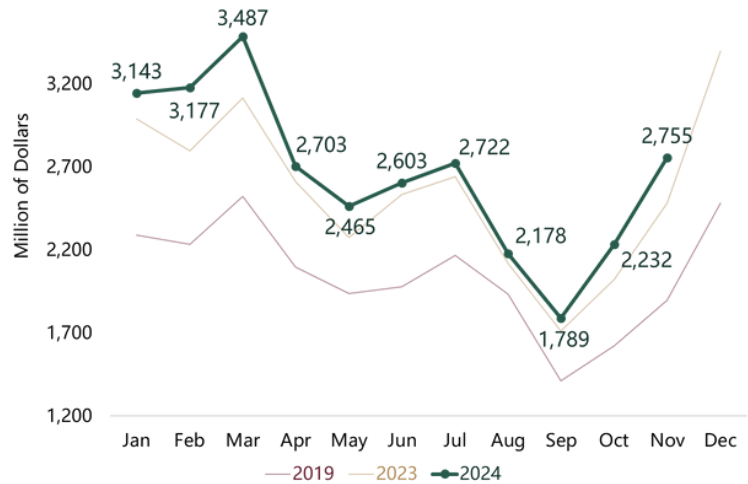
Note: In the graphs, the sum of monthly data does not coincide with the accumulated data for the period due to rounding of figures.

Source: INEGI

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

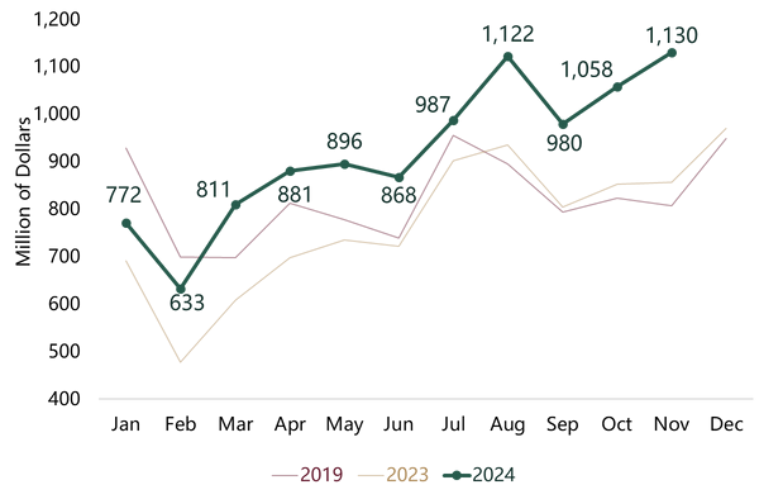
EXPENDITURE BY INTERNATIONAL VISITORS IN MEXICO

Expenditure by international visitors from January to November 2024 totaled **\$29.254 million**, marking a **7.2%** increase compared to the same period in 2023.



EXPENDITURE OF RESIDENTS IN MEXICO ABROAD

Expenditure by Mexican residents abroad reached **\$10.136 million** from January to November 2024, representing a **\$1.852 million** increase, or **22.4%**, compared to the same period in 2023.

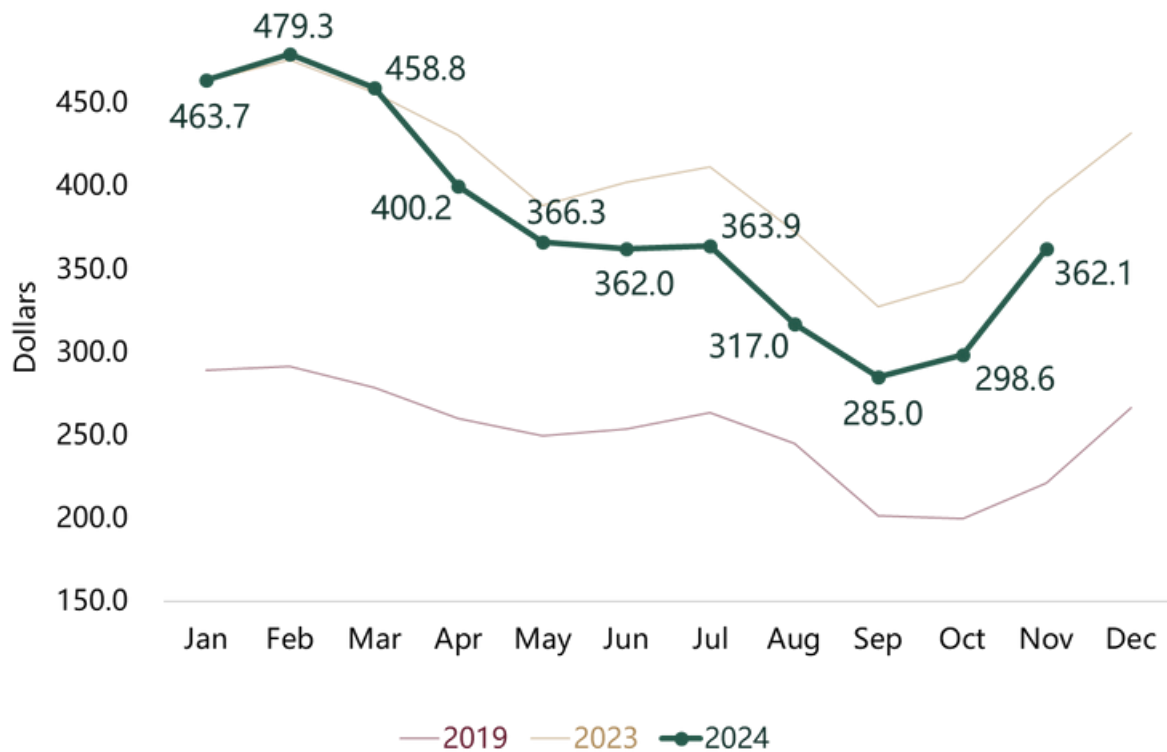


Note: In the graphs, the sum of monthly data does not match the cumulative data due to rounding of figures.
Source: INEGI.



AVERAGE EXPENDITURE BY INTERNATIONAL VISITORS

The average expenditure by international visitors was **\$378.0 dollars** during January-November 2024, which represented a decrease of **7.3%** compared to that observed in the same period in 2023.





INTERNATIONAL TRAVELER ACCOUNT INDEX OCTOBER 2024

The International Traveler Account Indices, which cover both the inflow and inflow of people entering the country, aim to measure accumulated monthly and annual variations in order to carry out a detailed monitoring of international tourism activity.



Income



The cumulative ICVI for Total Income (Expenses) went from 127.21 in October 2023 to 135.84 in October 2024

%

+ 6.78



The cumulative ICVI for Income (expenditure) from International Tourists increased from 130.12 in October 2023 to 136.94 in October 2024

%

+ 5.25



Accumulated income (expenditure) for international tourists by air went from 134.53 in October 2023 to 140.49 in October 2024

%

+ 4.43



People



Cumulative for International visitors (people) increased from 73.54 in October 2023 to 84.65 in October 2024

%

+ 15.10



Cumulative for International Tourists (people) increased from 92.87 in October 2023 to 99.53 in October 2024

%

+ 7.17



The accumulated ICVI for International Tourists by air (people) went from 105.45 in October 2023 to 107.32 in October 2024

%

+ 1.78



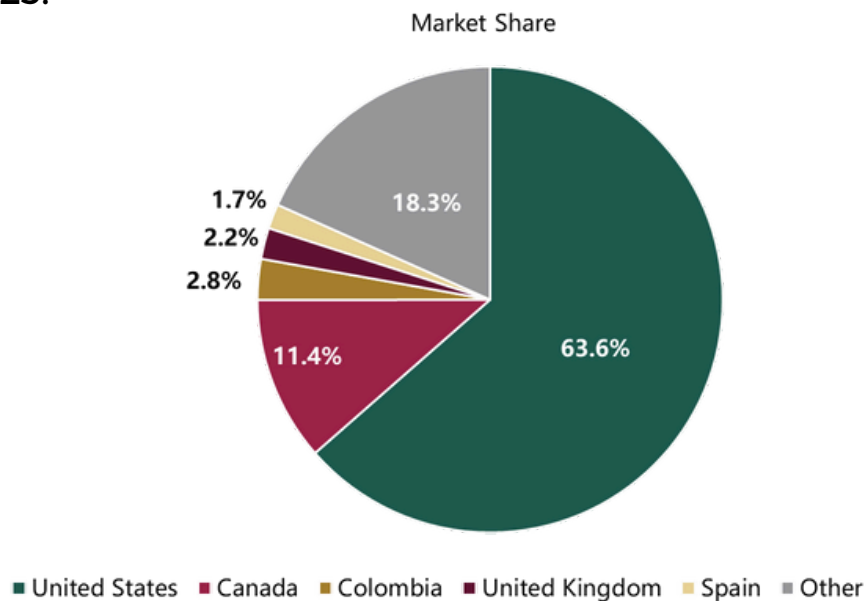
AIR TRANSPORT

NATIONALITIES OF PASSENGERS ARRIVING IN MEXICO

From January to November 2024, **19.92 million** foreign passengers arrived by air, a **2.2%** increase compared to the same period in 2023.

Top 5:

- **United States:** 12 million 658 thousand passengers, **+4.7%** higher than in 2023.
- **Canada:** 2 million 276 thousand passengers, **+7.7%** higher than in 2023.
- **Colombia:** 562,875 passengers, **-15.7%** lower than in 2023.
- **United Kingdom:** 430,194 passengers, **-5.4%** lower than in 2023.
- **Spain:** 340,162 passengers, **+1.8%** higher than in 2023.
- **Other nationalities:** 3 million 650 thousand passengers, **-4.9%** less than in 2023.

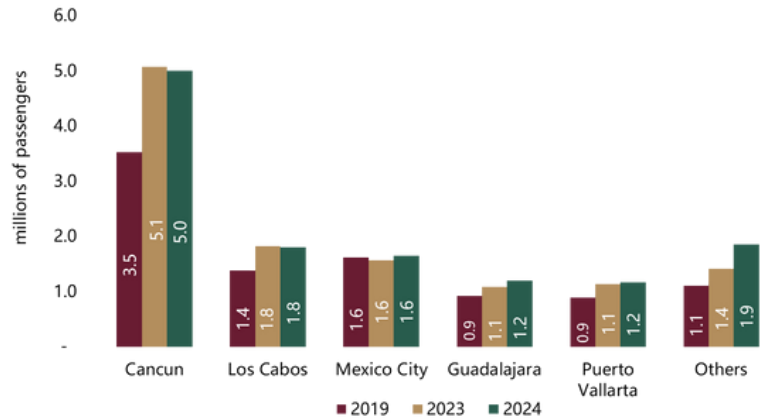


Note: In the graph, the sum of monthly data does not match the cumulative data for the period due to rounding of figures.

Source: Migration Policy, Registration and Identity of Persons Unit of the Ministry of the Interior.
<http://www.datatur.sectur.gob.mx/SitePages/Visitantes%20por%20Nacionalidad.aspx>

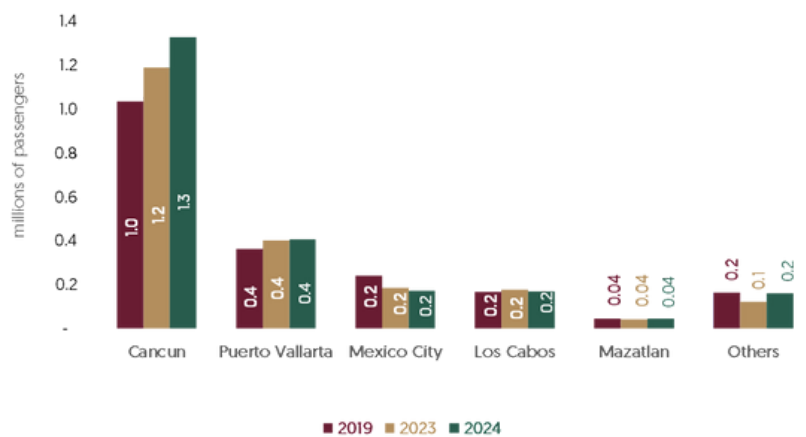
AMERICAN PASSENGERS TO MEXICO

From January to November 2024, **12.658 million** American passengers arrived by air, marking a **4.7%** increase compared to the same period in 2023. The majority arrived via the airports of Cancun and Los Cabos.



CANADIAN PASSENGERS TO MEXICO

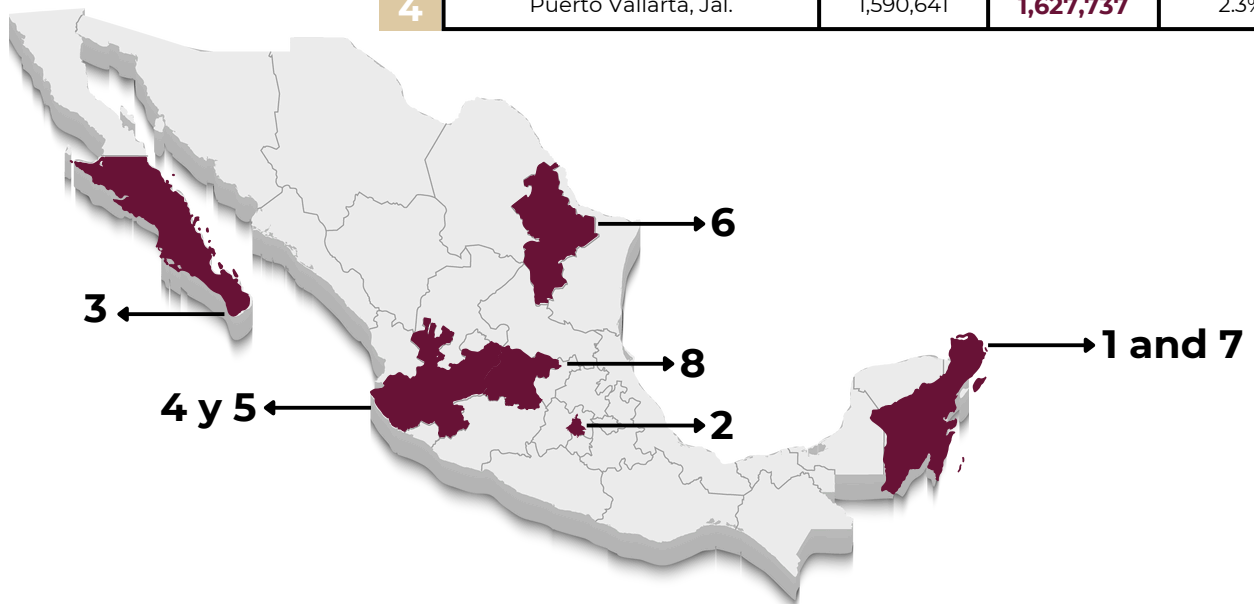
From January to November 2024, **2.276 million** Canadian passengers arrived by air, representing an **7.7%** increase compared to the same period in 2023. The majority arrived at the airports of Cancun and Puerto Vallarta.



FOREIGN PASSENGERS TO MAIN AIRPORTS

From January to November 2024, the airports receiving the most foreign passengers in Mexico were: **Cancun (Q. Roo)**, **Mexico City (AICM)**, **Los Cabos (B.C.S.)**, **Puerto Vallarta (Jal.)**, **Guadalajara (Jal.)**, **Monterrey (N.L.)**, **Tulum (Q. Roo)**, and **Silao (Gto.)**. Together, they accounted for **92.3%** of total foreign passenger arrivals by nationality.

January - November		Passenger Arrivals (thousands)		
	Airport	2023	2024	Var. %
1	Cancun, Q. Roo.	8,992,262	8,748,844	-2.7%
2	Mexico City, AICM.	3,859,920	3,831,763	-0.7%
3	Los Cabos, B.C.S.	2,073,632	2,039,236	-1.7%
4	Puerto Vallarta, Jal.	1,590,641	1,627,737	2.3%



January - November		Passenger Arrivals (thousands)		
	Airport	2023	2024	Var. %
5	Guadalajara, Jal.	1,160,935	1,278,747	10.1%
6	Monterrey, N.L.	317,354	353,743	11.5%
7	Tulum, Q. Roo.	N. d.	264,780	N. c.
8	Silao, Gto.	196,060	230,125	17.4%

N. d. Not available
N. c. Not comparable

Note: Figures refer to events because the same person may have entered the country on more than one occasion.
Source: Migration Policy, Registration and Identity of Persons Unit of the Ministry of the Interior.

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

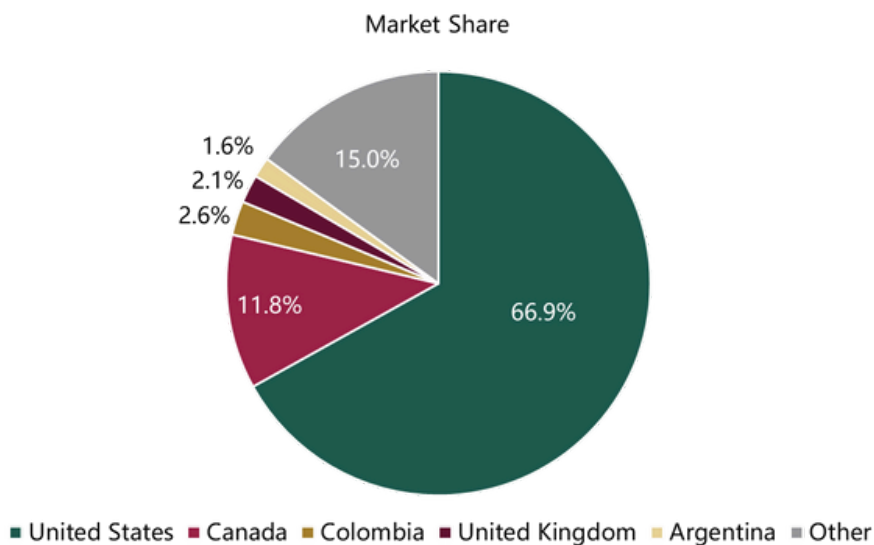


PASSENGERS BY COUNTRY OF RESIDENCE TO MEXICO

From January to November 2024, **18.255 million** foreign passengers arrived by air, a **5.6%** increase compared to the same period in 2023.

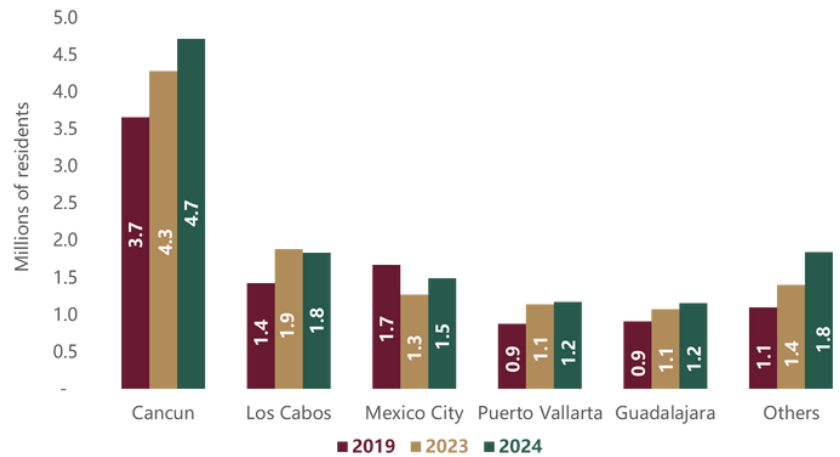
Top 5:

- **United States: 12 million 216 thousand** passengers, **+10.5%** higher than in 2023.
- **Canada: 2 million 153 thousand** passengers, **+11.1%** higher than in 2023.
- **Colombia: 472,513** passengers, **-19.2%** less than in 2023.
- **United Kingdom: 392,258** passengers, **-6.5%** lower than in 2023.
- **Argentina: 284,035** passengers, **+9.1%** higher than in 2023.
- **Other nationalities: 2 million 4737 thousand** passengers, **-9.7%** lower than in 2023.



US RESIDENTS TRAVELING TO MEXICO

From January to November 2024, **12.216 million** passengers residing in the United States arrived, marking a **10.5%** increase compared to the same period in 2023. The majority arrived through the airports of Cancun and Los Cabos.



CANADIAN RESIDENTS TRAVELING TO MEXICO

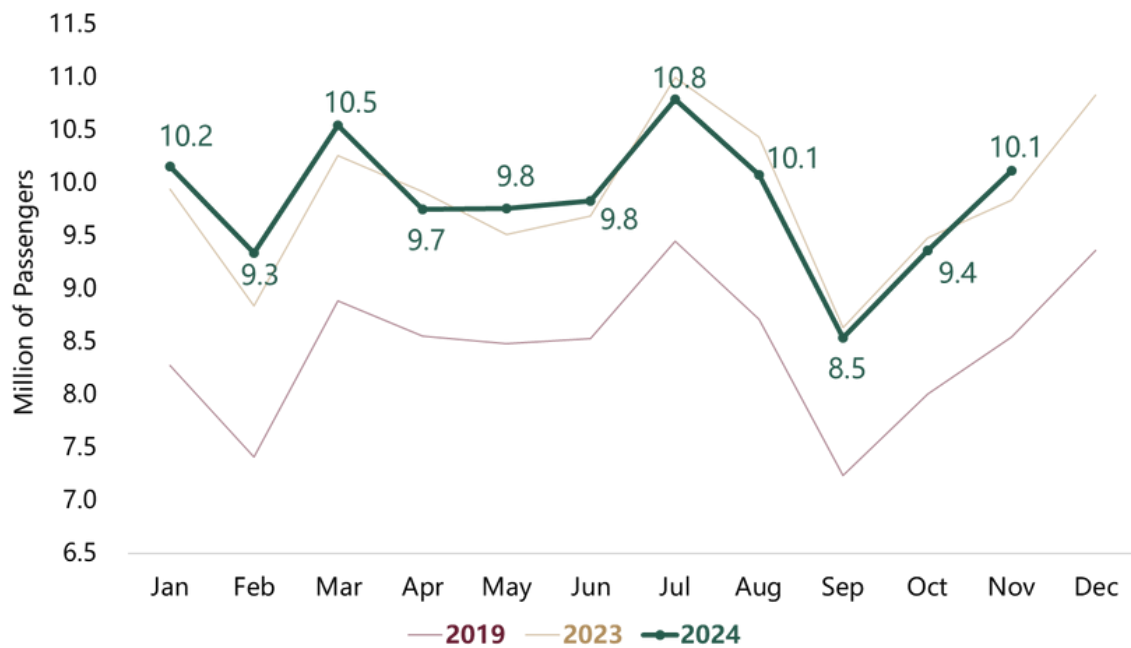
From January to November 2024, **2.153 million** passengers residing in Canada arrived, marking a **11.1%** increase compared to the same period in 2023. The majority arrived through the airports of Cancun and Puerto Vallarta.





PASSENGERS ON DOMESTIC AND INTERNATIONAL FLIGHTS

From January to November 2024, a total of **108.239 million** air passengers were recorded, marking an increase of **703.998** passengers, or **0.7%**, compared to the same period in 2023.

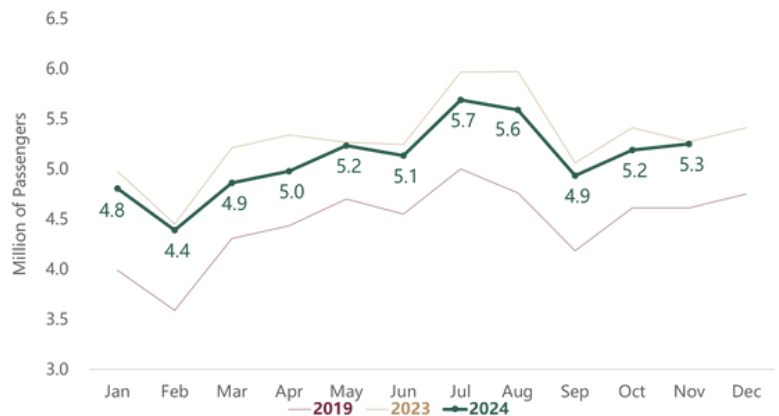


Preliminary figures for 2024.
Source: Federal Civil Aviation Agency (AFAC).



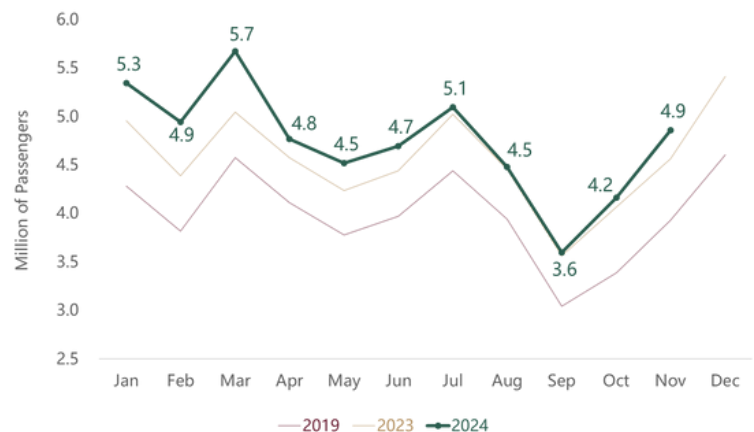
PASSENGERS ON DOMESTIC FLIGHTS

From January to November 2024, **56.081 million** passengers arrived on domestic flights, a decrease of 2.130 million passengers, or **3.7%**, compared to the same period in 2023.



PASSENGERS ON INTERNATIONAL FLIGHTS

From January to November 2024, **52.158 million** passengers arrived on international flights, an increase of 2.834 million passengers, or **5.7%**, compared to the same period in 2023.



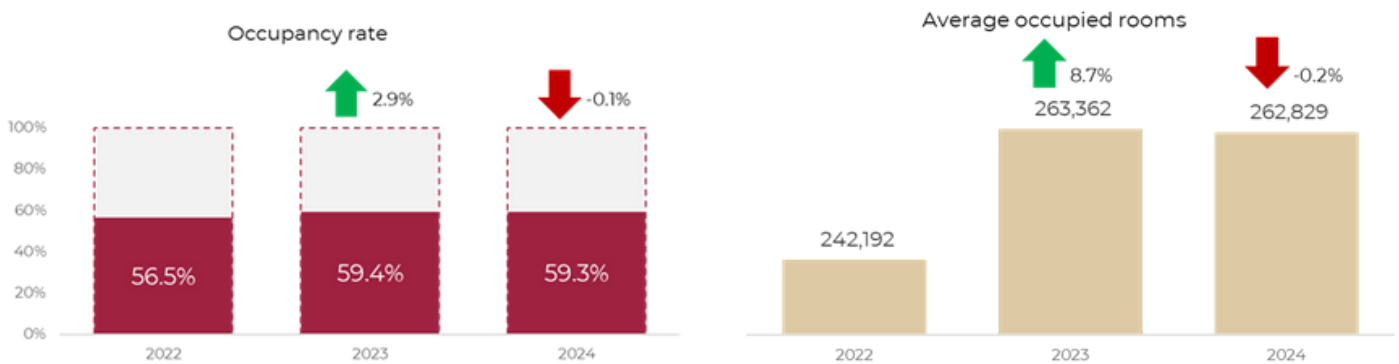
Preliminary figures for 2024.
Source: Federal Civil Aviation Agency (AFAC).



ACCOMMODATION

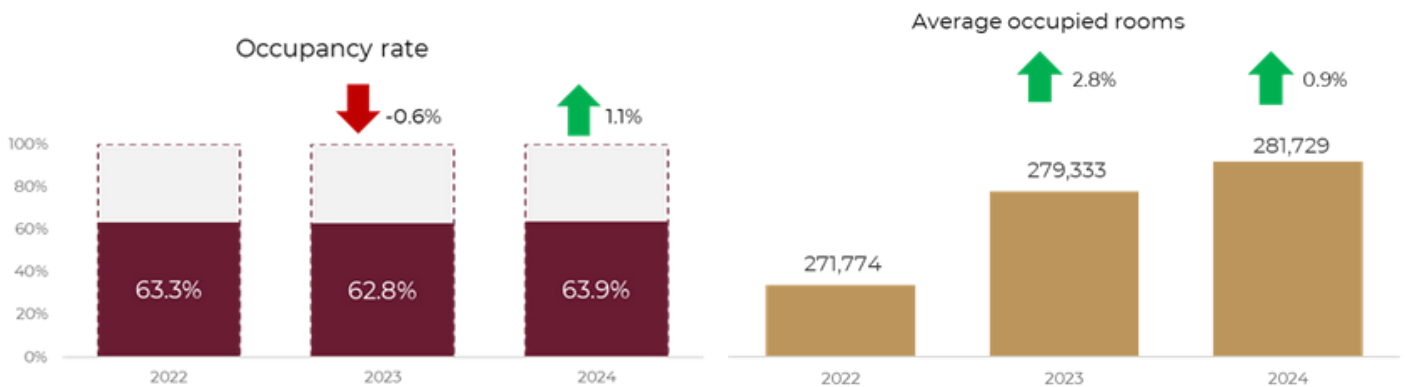
HOTEL OCCUPANCY RATE (CUMULATIVE JAN-NOV)

The hotel occupancy rate at 70 selected tourist centers was **59.3%** from January to November 2024, 0.1 percentage points lower than the same period in 2023.



HOTEL OCCUPANCY RATE (NOVEMBER)

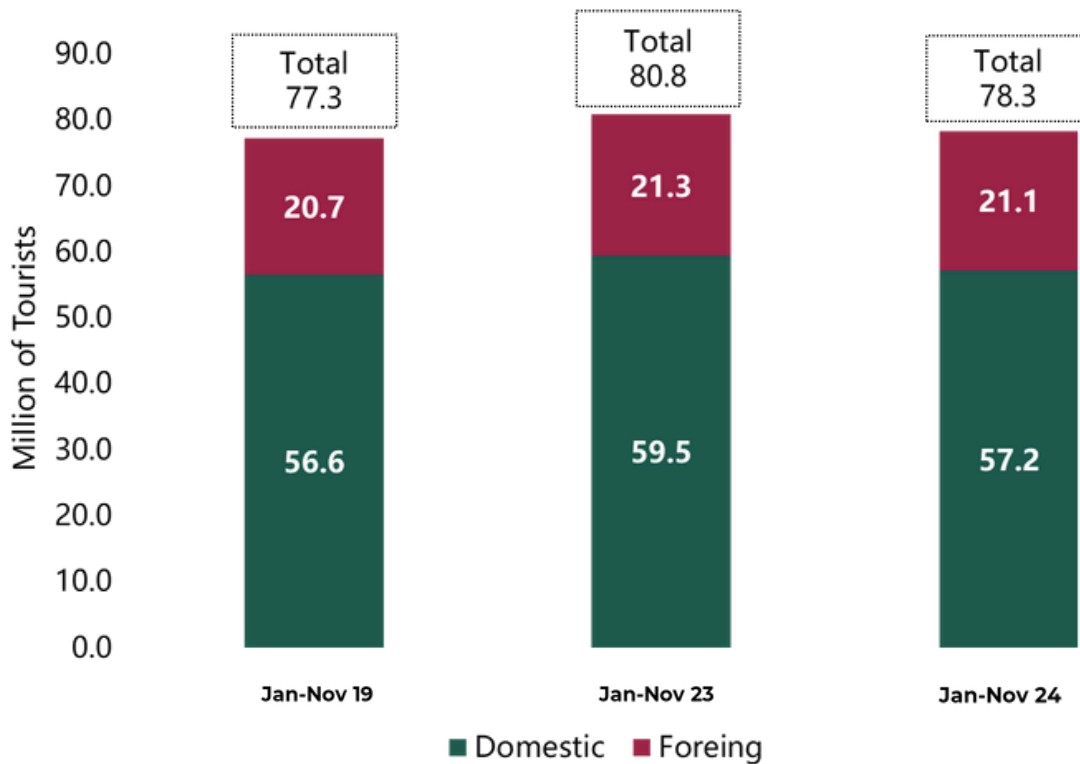
The hotel occupancy rate in the selection of 70 tourist centers was **63.9%** in November 2024, 1.1 percentage points higher than November 2023.



Note: The variation may not match exactly due to rounding. Occupancy variation in percentage points.

TOURIST ARRIVALS IN HOTEL ROOMS (CUMULATIVE JAN-NOV)

From January to November 2024, **57.2 million national tourists** arrived at hotel rooms, representing **73.1%** of the total, while **21.1 million international tourists** arrived, accounting for **26.9%** of the total.



Tourist arrival		
Percent Change 2024 - 2023		
	Nationals	Foreigners
November	0.2%	4.6%
Cumulative January to November	-3.9%	-0.8%

Note: The variation may not match exactly due to rounding. Occupancy variation in percentage points.



OCCUPANCY PERCENTAGE BY TYPE OF CENTRE

In November 2024, occupancy rates were **67.6%** for Beach Centers and **60.7%** for City Centers.

Center type	November		
	2023	2024	Percentage difference 2024 vs. 2023
Total	62.8%	63.9%	1.1%
Beach centers	64.7%	67.6%	2.9%
Cities	61.1%	60.7%	-0.4%

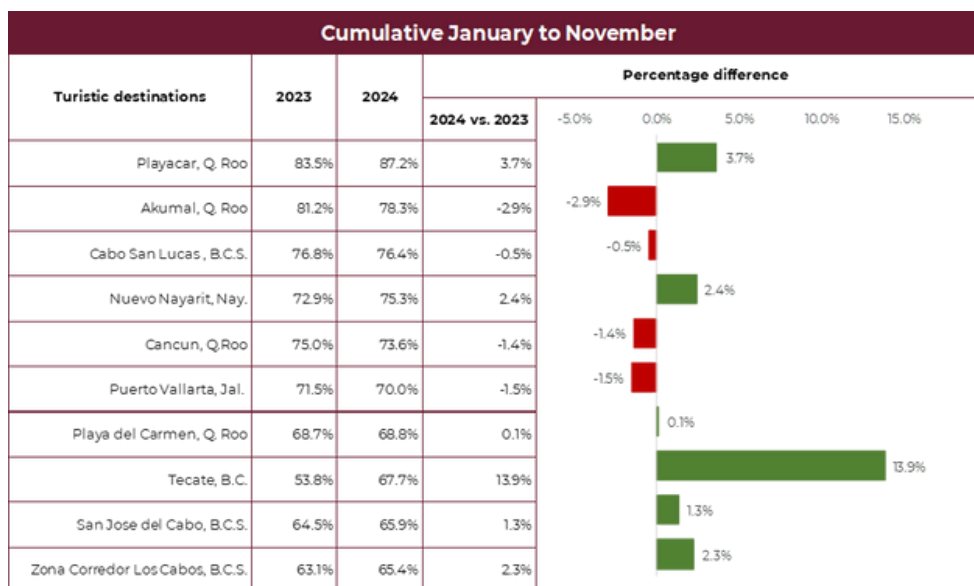
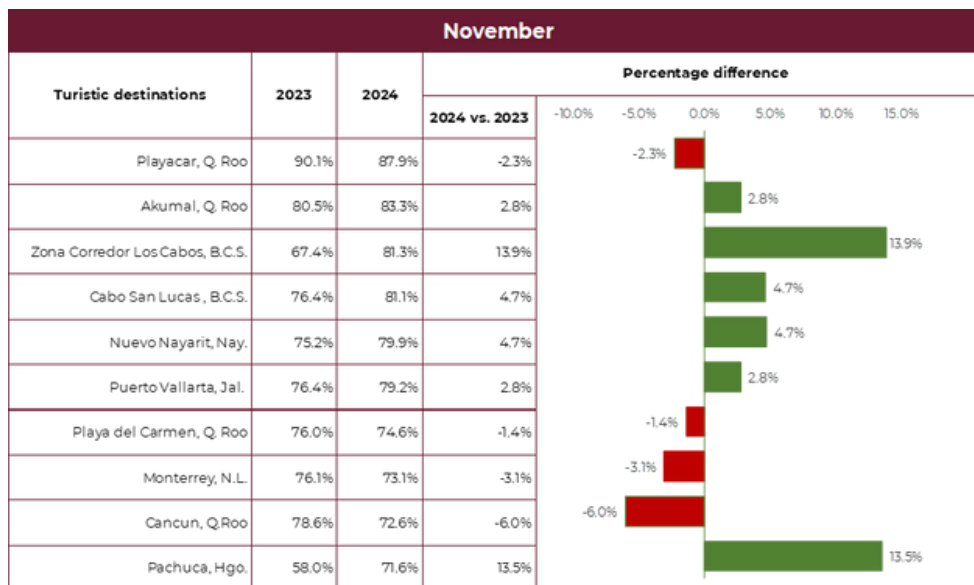
Center type	Cumulative January to November		
	2023	2024	Percentage difference 2024 vs. 2023
Total	59.4%	59.3%	-0.1%
Beach centers	65.9%	65.5%	-0.4%
Cities	53.7%	54.0%	0.3%

Note: The variation may not match exactly due to rounding. Occupancy variation in percentage points.



OCCUPANCY PERCENTAGE RANKING

In November 2024, Playacar (Q. Roo) and Akumal (Q. Roo) stood out with hotel occupancy rates of **87.9%** and **83.3%**, respectively, marking a decrease of 2.3 and an increase of 2.8 percentage points compared to the same month in 2023.

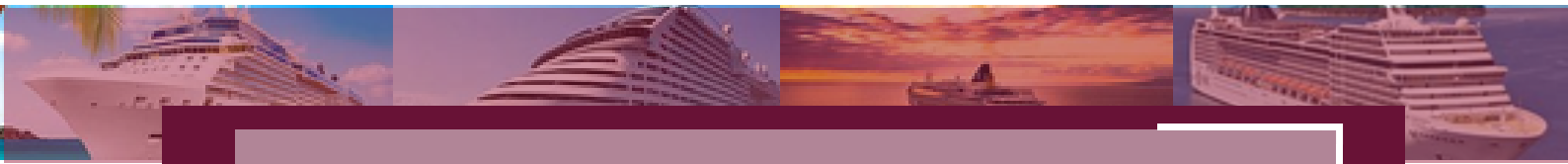


Note: The variation may not match exactly due to rounding. Occupancy variation in percentage points.

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

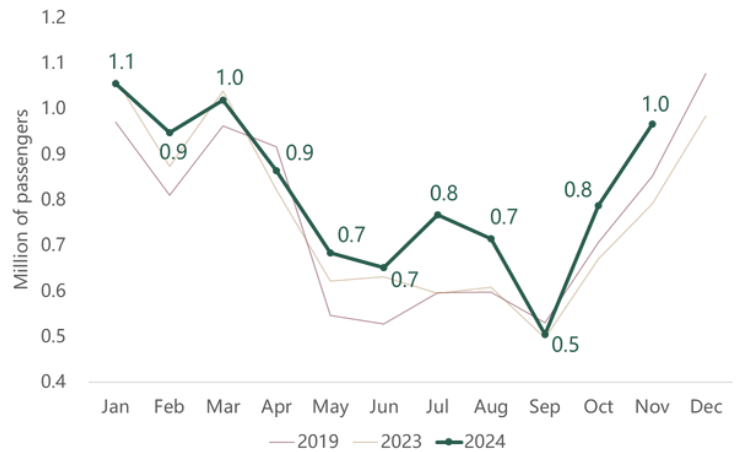


CRUISES



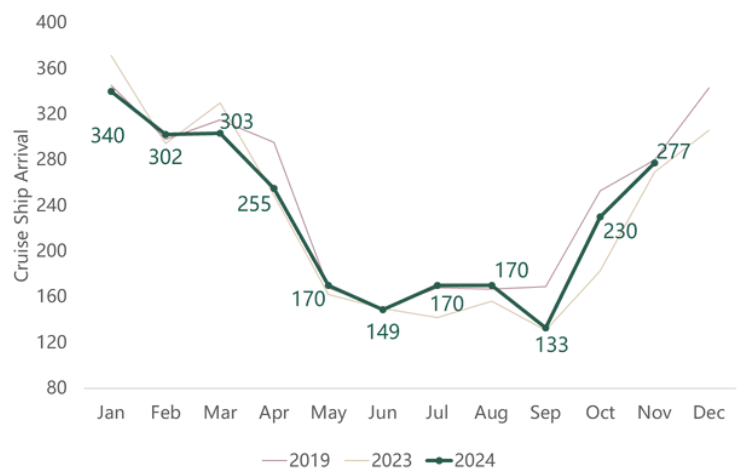
CRUISE PASSENGERS ARRIVALS

From January to November 2024, **8.96 million** cruise passengers arrived, marking a **9.1%** increase compared to the same period in 2023.



CRUISE SHIPS ARRIVALS

From January to November 2024, **2,499** cruise ships arrived at various ports in the country, representing a **2.5%** increase compared to the same period in 2023.



Source: INEGI and General Directorate of Ports; Secretariat of the Navy. (The figures prior to May 2020 correspond to the SCT, according to the presidential decree issued on December 7, 2020 in the Official Gazette of the Federation and Press Release No. 006/2024 of the General Coordination of Ports and Merchant Marine of June 7, 2024).

<https://www.inegi.org.mx/temas/turismo/>

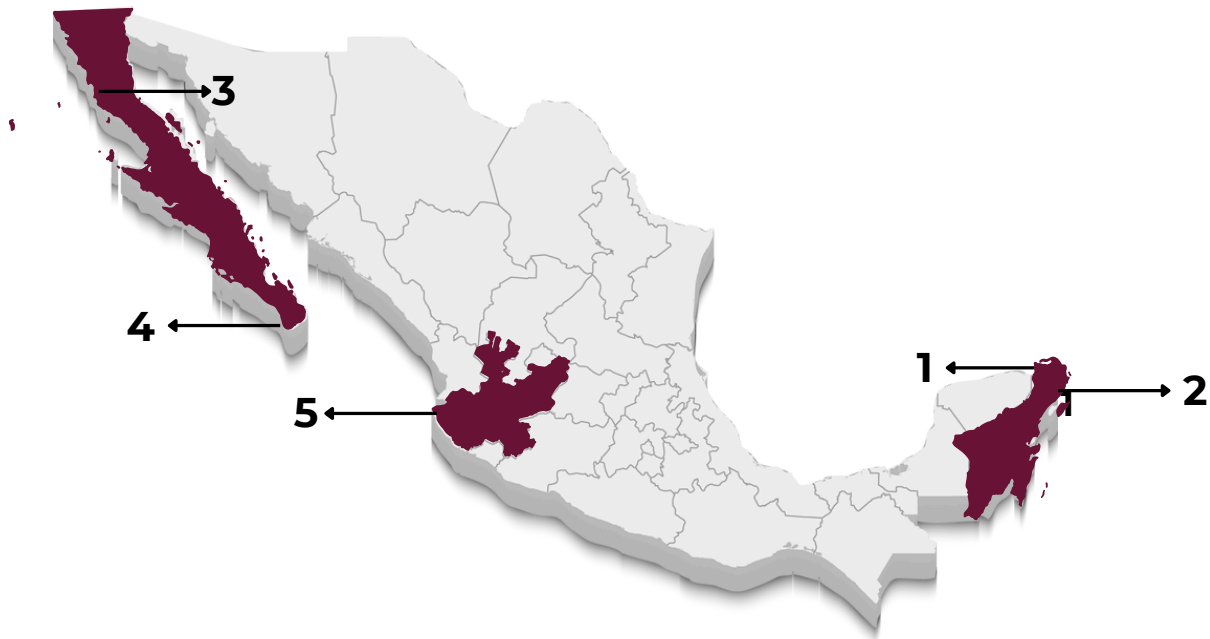
<http://www.datatur.sectur.gob.mx/SitePages/Actividades%20En%20Crucero.aspx>



ARRIVAL OF CRUISE PASSENGERS AND ARRIVALS OF CRUISE SHIPS TO MAIN PORTS OF MEXICO

From January to November 2024, the ports receiving the most cruise ship passengers in Mexico were: **Cozumel (Q. Roo)**, **Majahual (Q. Roo)**, **Ensenada (B.C.)**, **Cabo San Lucas (B.C.S.)**, and **Puerto Vallarta (Jal.)**, accounting for **91.0%** of the total passenger arrivals.

January - November		Cruise Ship Arrivals		
	Puerto	2023	2024	Var. %
1	Cozumel, Q. Roo.	1,014	1,122	10.7%
2	Majahual, Q. Roo.	397	453	14.1%
3	Ensenada, B.C.	293	246	-16.0%
4	Cabo San Lucas, B. C. S.	206	175	-15.0%
5	Puerto Vallarta, Jal.	161	141	-12.4%



January - November		Cruise Passenger Arrivals (thousands)		
	Puerto	2023	2024	Var. %
1	Cozumel, Q. Roo.	3,590,248	4,107,344	14.4%
2	Majahual, Q. Roo.	1,564,086	1,942,503	24.2%
3	Ensenada, B.C.	925,008	852,457	-7.8%
4	Cabo San Lucas, B. C. S.	647,747	625,653	-3.4%
5	Puerto Vallarta, Jal.	505,670	473,121	-6.4%

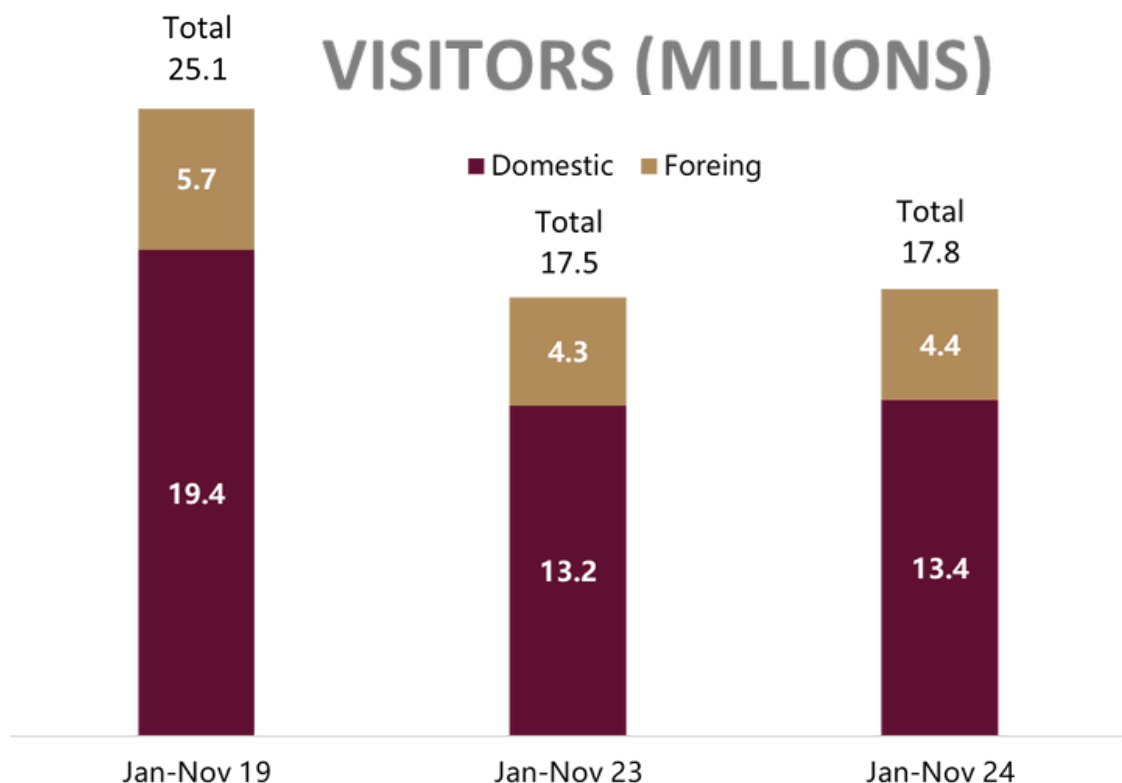
Note: The figures refer to events because the same person may have entered the country on more than one occasion.
Source: Directorate of Ports, General Coordination of Ports and Merchant Marine of the Secretariat of the Navy (Figures prior to May 2020, corresponding to the SCT, according to the presidential decree issued on December 7, 2020 in the Official Gazette of the Federation and Press Release No. 006/2023 of the General Coordination of Ports and Merchant Marine of June 7, 2021).



MUSEUMS AND ARCHAEOLOGICAL SITES

VISITORS TO MUSEUMS AND ARCHAEOLOGICAL SITES

From January to November 2024, the National Institute of Anthropology and History reported **17.839 million visitors** to museums and archaeological sites, an increase of **360.202** visitors, or **2.1%**, compared to the same period in 2023. Of the total, **75.1%** were national visitors and **24.9%** were international.





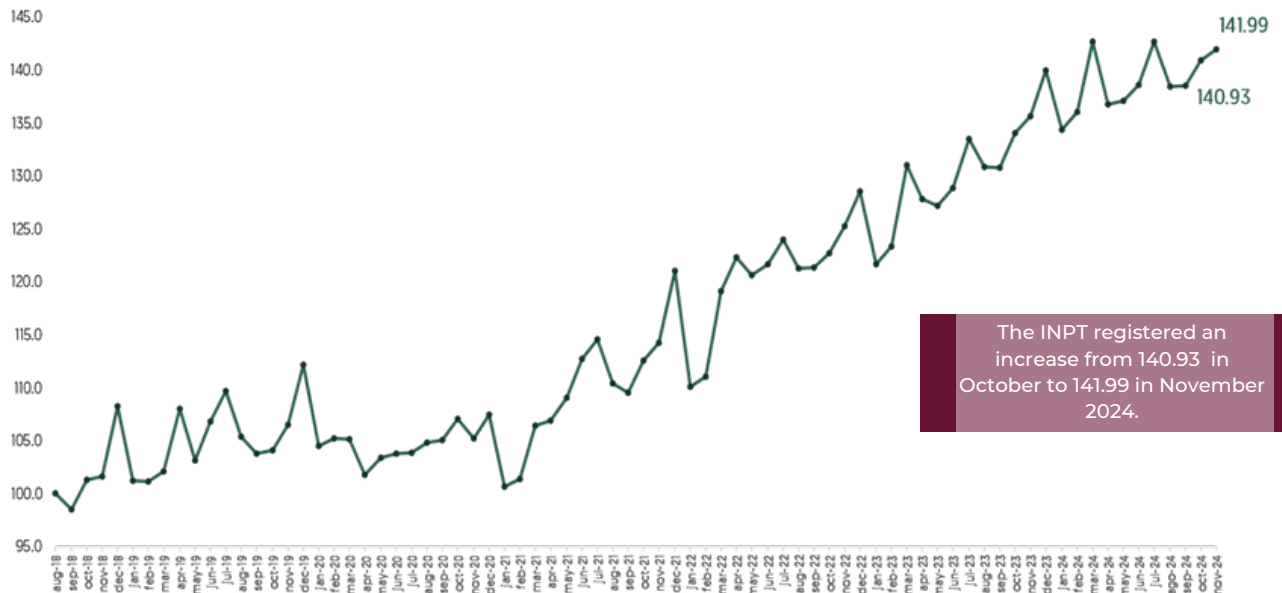
ECONOMY



NATIONAL TOURIST PRICE INDEX (INPT) NOVEMBER 2024

The National Tourist Price Index is an economic indicator that monitors the fluctuation of prices in representative tourist services in Mexico. It helps travelers, businesses and policy makers understand price trends in the tourism industry and their impact on the national economy.

NATIONAL TOURIST PRICE INDEX



The INPT registered an increase from 140.93 in October to 141.99 in November 2024.

The INPT consists of six key components selected for their economic importance and representativeness in tourism consumption, which recorded the following annual inflation:



Restaurants, bars and the like
+7.35%



Foreign bus
+7.19%



Package tour services
+6.47%



Hotels
+6.35%



Highway tolls
+1.10%

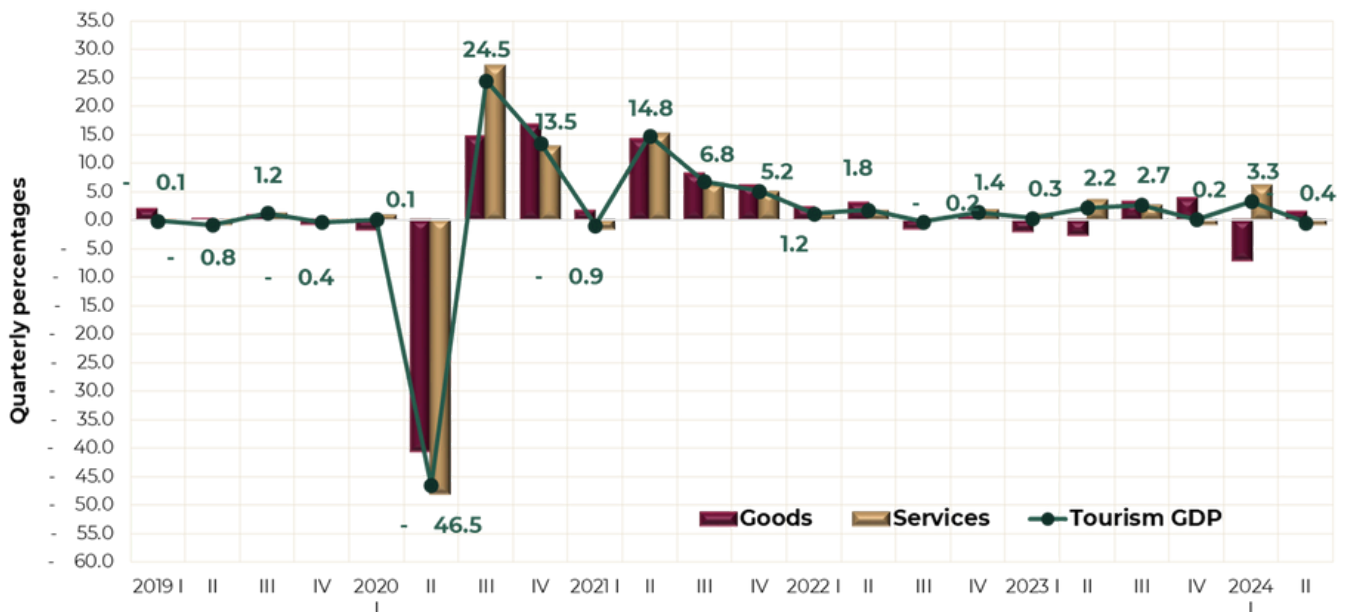


Air transportation
-1.83%

GROSS DOMESTIC PRODUCT OF TOURISM

Based on the Quarterly Indicators of Tourism Activity, the tourism GDP in the second quarter of 2024 decreased **0.4%** in real terms compared to what was recorded in the first quarter of 2024.

By components of tourism GDP, in the second quarter of 2024, Goods showed an increase of **1.4%**, while Services had a decrease of **0.8%** compared to what was recorded in the first quarter of 2024.





ECONOMIC CONTEXT (BANK OF MEXICO)

Domestic

In the third quarter of 2024, national economic activity showed a seasonally adjusted quarterly growth rate higher than those observed in the previous three quarters, during which the economy displayed marked weakness. Specifically, after respective quarterly variations of 0.07%, 0.06%, and 0.36% in the previous three quarters, in the July-September period, GDP increased by 1.08% on a seasonally adjusted quarterly basis. In annual comparison, GDP showed a 1.6% year-on-year increase with seasonally adjusted data (the same annual variation as observed with unadjusted figures).

From a sectoral perspective, economic performance in the third quarter of 2024 reflected increases in all three major sectors of economic activity. Primary activities made a relatively high contribution to the growth of the period (seasonally adjusted quarterly variation of 4.93% and a contribution of 0.16 percentage points to overall economic expansion). Meanwhile, industrial activity grew for the second consecutive quarter and continued to show improvement (seasonally adjusted quarterly growth of 0.88%), although it was just slightly above the level observed in the second half of 2023. In turn, tertiary activities maintained an upward trend, even accelerating their quarterly growth rate, expanding by 1.05% with seasonally adjusted data.

On the demand side, it is expected that in the third quarter, private consumption recovered from the contraction observed in the previous quarter. However, growth in this aggregate so far this year has been lower than that observed in the same period of 2023. Regarding investment, it is anticipated that in the third quarter it continued to expand after the stagnation observed between the last quarter of 2023 and early 2024. Finally, it is estimated that the added value of exports improved relative to the previous quarter.

International

In the third quarter of 2024, global economic activity expanded at a pace similar to that observed in the previous quarter. Both advanced economies and emerging markets recorded growth close to that seen in the second quarter, although with heterogeneous behavior across countries. In the quarter covered by this report, purchasing managers' indices showed a wide divergence between the manufacturing and services sectors. The indices for October suggest that activity in the services sector continued to expand, albeit at a more moderate pace.

In the United States, economic activity registered solid growth in the third quarter, although slightly lower than that observed in the previous quarter. The Gross Domestic Product (GDP) increased at a seasonally adjusted quarterly rate of 0.70%, after having risen by 0.74% in the second quarter.

In the Eurozone, economic activity registered modest growth in the third quarter of the year, although at a slightly higher pace than observed in the second quarter. Available indicators suggest that the services sector continued to support activity, while manufacturing remained weak. As for the labor market, it remained resilient.

In the third quarter of the year, the main emerging economies showed growth similar to that observed in the previous quarter.

Global growth projections developed by international organizations for 2024 and 2025 remained relatively stable compared to those available mid-year. Thus, they continue to indicate that the projected growth rate for 2025 would be similar to that observed in 2023 and to the expected rate for the end of 2024.

