

# Mexico

## Tourism in the economy

In 2018, tourism contributed 8.7% of GDP, higher than the contribution from the construction, financial services and mining sectors. In 2018, tourism directly employed more than 2.3 million people (6.0% of total employment) its highest level since 2006. In 2018 tourism export earnings of MXN 215.5 billion were recorded. Travel exports represented 78.3% of total service exports in 2018. Most tourism consumption was inbound (82.5%) rather than outbound leading to a balance of payments surplus. In 2018, inbound tourism consumption grew by 2.8% compared with the previous year, a higher growth rate than the general economy.

In 2018, there were 41.3 million international visits, a 5.1% increase on 2017. During 2018, international tourism receipts amounted to MXN 433.0 billion and the largest source market was the United States, accounting for 10.5 million tourists. However, since 2016 overnight visitors from the United States have decreased by 56.7%. Other key markets are Canada (2.2 million) and United Kingdom (590 900), both of which experienced steady growth. In 2018, there were record levels of domestic tourism amounting to some 100.4 million nights, an increase of 5.1% on 2017.

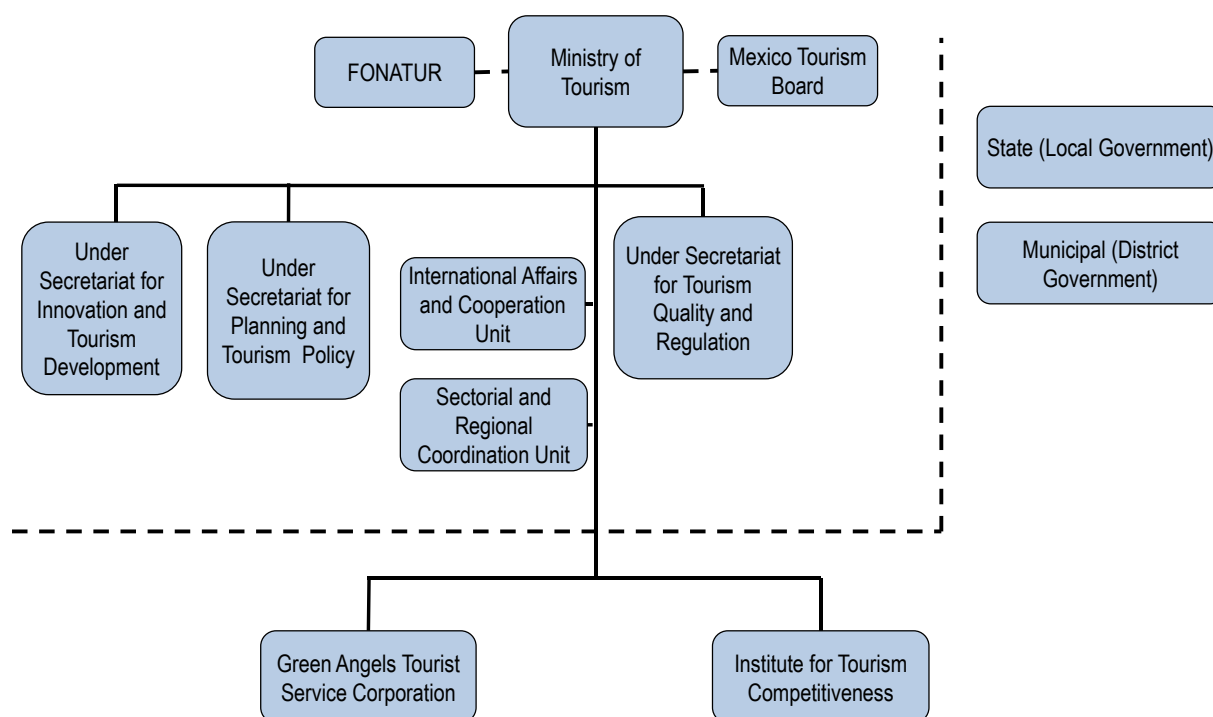
## Tourism governance and funding

The Ministry of Tourism is the lead government body with responsibility for tourism policy, planning, development, quality and regulation. The development of tourism policy is subject to the Guiding Principles set out in the National Development Plan 2019-24, which seek policy measures to strengthen communities and ensure the welfare of all Mexicans. The development plan includes the establishment of a Tourism Diplomacy Council. Composed of representatives of the Ministry of Tourism, the Ministry of Foreign Affairs, private sector, academic and social sectors, its primary function is the promotion of Mexico's image abroad to strengthen both tourism flows and foreign direct investment. The tourism budget is linked to the National Development Plan. In 2019, the budget amounted to MXN 8.7 billion. This figure consisted of around MXN 885 million for the Ministry of Tourism, MXN 6.5 billion for FONATUR, the tourism investment and development agency, and MXN 577 million for the Mexico Tourist Board.

## Tourism policies and programmes

The Government's overall priority is to consolidate Mexico as a globally important tourism destination, where the sustainable use of cultural and natural heritage enables equitable development amongst individuals, communities and regions. The 2019-24 tourism model will involve a new social approach, inclusive and diverse, that will promote constitutional rights to rest and recreation.

## Mexico: Organisational chart of tourism bodies



Source: OECD, adapted from the Ministry of Tourism, 2020

The Tourism Sector Programme 2019-24 addresses four objectives:

- Use tourism to promote a social approach and respect for human rights.
- Promote the balanced development of tourist destinations, by developing new tourism development projects, formation of tourist attraction clusters, alongside the devolution of functions and powers to regions from the Ministry of Tourism.
- Strengthen the diversification of tourism markets nationally and internationally, by innovating its promotion and marketing mechanisms through the Visitmexico digital platform. In addition public policies between different agencies will be strengthened; for example joint efforts with the Ministry of Foreign Affairs relating to improving the image of Mexico abroad.
- Promote sustainable tourism, to move to consolidate as a green destination.

Priority programmes include:

- Enjoy Mexico. The programme will aim to strengthen the national market and guarantee the right of all Mexicans to appreciate and enjoy their heritage. It will establish agreements with tour operators and national strategic partners to offer low-cost tour packages. Tourism flows will be reoriented to emerging and developing destinations while also improving seasonality in low and shoulder seasons.
- Smiles for Mexico. This programme will ensure that tourism is accessible for all, with attention to the most vulnerable segments of the population.
- Mayan train. A high impact project and the largest investment in the sector in recent years (see box).
- Comprehensive Tourism Development Project of Huasteca Potosina. Within the framework of the presidential announcement for the construction of the new Huasteca Potosina airport, the

Comprehensive Tourism Development Project will be a model of nature tourism that will become a national and international benchmark.

- **Anchor Tourist Products.** In order to strengthen the regional approach, “anchor” products will be developed to improve and revitalise the current offer and promote the integration of specialised tourist routes, in co-ordination with state, municipal governments and the private sector.
- **Operation Touch Doors.** This Programme is focused on diversifying markets and positioning Mexico as a reference destination for international markets, especially in niches with high purchasing power such as the United States, United Kingdom and France.
- **Reunion with my roots.** A Programme to attract the Mexican diaspora in North America, to increase the number of trips and the spending of the Mexican - American population.
- **Sustainable Mexico Reborn.** The objective of this programme is to position Mexico as an international benchmark of good practice, through the creation of a new generation of sustainable tourist routes.

The *Tianguis Turístico* travel market has become an important business forum, where entrepreneurs, hoteliers, travel trade, meeting planners and specialised media from all over world meet Mexican companies, generating important annual and multi-year commercial relationships. The 44<sup>th</sup> Tianguis Turístico de México in 2019 hosted 851 tourism companies and 1 344 buyers.

### Using a major tourism attraction as a means for regional development in Mexico

The Mayan Train project will develop a new leading tourism attraction for Mexico, facilitating the dispersal of tourists across new regions and local communities. The Mayan Train is based on a sustainable regional development model, which will boost economic growth without damaging the environment. The aims of the project are to develop the regional economy, improve inhabitants' quality of life and protect the environment that the line will pass through. The line will run for 1 525 kilometres through the Yucatan Peninsula. While the line will be used for freight and domestic travel, it will be positioned as one of the world's foremost tourism experiences and provide the means for regional development, stimulating new tourism experiences and involving local communities. The route will include tourist circuits highlighting beaches, archaeological sites, museums, towns and world heritage sites. The route will be designed to reflect a high degree of sustainability, environmental protection and biodiversity. In order to draw on the necessary scientific and technological advice, agreements were signed with academic institutions. A Contribution Agreement with the UN-Habitat Agency was signed, as well as a technical assistance agreement with the Office of the United Nations Project Services (UNOPS).

At the local level, policy is focused on efforts to promote regional development. The *Pueblos Mágicos* committees promote tourist activities and projects in the most attractive municipalities of the country. The 2019 *Tianguis de Pueblos Mágicos*, a travel market and business forum, attracted 151 000 visitors. To contribute to the development of the accessible tourism, the Ministry has developed guidelines for building design drawing on best practice and aimed at entrepreneurs in the sector. The sustainable development of tourism destinations is an increasingly important priority for the Ministry as the following examples show:

- **Policy Perspectives to 2040** – In 2017, the Ministry, together with the Tourism Commission of the National Conference of Governors, carried out an extensive public consultation exercise with three national forums held on current challenges. Key themes, based on sustainable and competitive tourism, were identified and aided the development of public policy.
- **Planning Policy** – The Ministry has worked closely with local authorities in the design of urban planning instruments and guidelines that will encourage sustainability. This work has focussed on

projects that benefit the inhabitants of tourist destinations. The plans integrate national territorial planning and regional development policies.

## Statistical Profile

### Mexico: Domestic, inbound and outbound tourism

	2014	2015	2016	2017	2018
<b>TOURISM FLOWS, THOUSAND</b>					
<b>Domestic tourism</b>					
Total domestic trips	..	..	..	..	..
Overnight visitors (tourists)	80 746	85 939	89 874	95 557	100 445 p
Same-day visitors (excursionists)	..	..	..	..	..
Nights in all types of accommodation	..	..	..	..	..
Hotels and similar establishments	143 035	143 754	150 445	156 612	166 707 p
Other collective establishments	..	..	..	..	..
Private accommodation	..	..	..	..	..
<b>Inbound tourism</b>					
Total international arrivals	81 042	87 129	94 853	99 349	96 497
Overnight visitors (tourists)	29 346	32 093	35 079	39 291	41 313
Same-day visitors (excursionists)	51 696	55 035	59 774	60 058	55 184
Top markets					
United States	23 399	24 094	24 261	10 340	10 496
Canada	1 677	1 749	1 781	1 985	2 155
United Kingdom	459	506	545	563	591
Spain	310	333	361	377	386
France	214	222	234	261	287
Nights in all types of accommodation	..	..	..	..	..
Hotels and similar establishments	70 718	82 654	86 616	89 345	93 323 p
Other collective establishments	..	..	..	..	..
Private accommodation	..	..	..	..	..
<b>Outbound tourism</b>					
Total international departures	90 982	94 988	97 372	94 274	86 280
Overnight visitors (tourists)	18 261	19 603	20 223	19 067	19 748
Same-day visitors (excursionists)	72 721	75 385	77 149	75 208	66 531
Top destinations					
..	..	..	..	..	..
..	..	..	..	..	..
..	..	..	..	..	..
..	..	..	..	..	..
..	..	..	..	..	..
<b>TOURISM RECEIPTS AND EXPENDITURE, MILLION USD</b>					
<b>Inbound tourism</b>					
Total international receipts	16 607	18 728	20 619	22 467	23 803
International travel receipts	16 208	17 734	19 650	21 336	22 526
International passenger transport receipts	399	995	970	1 131	1 276
<b>Outbound tourism</b>					
Total international expenditure	12 556	12 668	12 823	13 647	14 072
International travel expenditure	9 606	10 098	10 303	10 840	11 230
International passenger transport expenditure	2 950	2 570	2 520	2 807	2 843

.. Not available; p Provisional data

Source: OECD Tourism Statistics (Database).

StatLink  <http://dx.doi.org/10.1787/888934077426>

## Mexico: Enterprises and employment in tourism

	Number of establishments	Number of persons employed				
	2018	2014	2015	2016	2017	2018
<b>Total</b>	..	<b>2 178 956</b>	<b>2 226 594</b>	<b>2 275 411</b>	<b>2 297 142 p</b>	<b>2 344 696 p</b>
<b>Tourism industries</b>	<b>109 287 p</b>	<b>1 539 568</b>	<b>1 581 635</b>	<b>1 613 887</b>	<b>1 628 253 p</b>	<b>1 656 908 p</b>
Accommodation services for visitors	..	189 058	198 140	203 674	205 074 p	209 187 p
Hotels and similar establishments	22 560 p	..	..	..	..	..
Food and beverage serving industry	79 151 p	619 663	639 360	658 096	662 757 p	681 580 p
Passenger transport	..	532 686	543 198	552 814	565 694 p	573 717 p
Air passenger transport	..	24 731	26 109	27 256	29 299 p	30 530 p
Railways passenger transport	..	914	907	942	943 p	917 p
Road passenger transport	..	505 685	514 733	523 111	533 732 p	540 436 p
Water passenger transport	..	1 356	1 449	1 505	1 720 p	1 834 p
Passenger transport supporting services	..	3 502	3 641	3 540	3 510 p	3 455 p
Transport equipment rental	..	4 169	4 386	4 531	4 468 p	5 185 p
Travel agencies and other reservation services industry	7 576 p	20 018	20 381	20 648	20 926 p	19 463 p
Cultural industry	..	36 269	37 177	37 460	37 371 p	37 659
Sports and recreation industry	..	56 512	55 646	56 110	56 931 p	56 354
Retail trade of country-specific tourism characteristic goods	..	77 691	79 706	77 014	71 522 p	70 308 p
Other country-specific tourism industries	..	..	..	..	..	..
<b>Other industries</b>	..	<b>639 388</b>	<b>644 959</b>	<b>661 524</b>	<b>668 889 p</b>	<b>687 788 p</b>

.. Not available; p Provisional data

Source: OECD Tourism Statistics (Database).

StatLink  <http://dx.doi.org/10.1787/888934077445>

## Mexico: Internal tourism consumption

Million MXN

	2018		
	Domestic tourism expenditure	Inbound tourism expenditure	Internal tourism consumption
<b>Total</b>	..	..	..
<b>Consumption products</b>	<b>2 666 482 p</b>	<b>555 951 p</b>	<b>3 222 433 p</b>
Tourism characteristic products	2 436 336 p	554 501 p	2 990 836 p
Accommodation services for visitors	533 420 p	156 744 p	690 164 p
Food and beverage serving services	487 037 p	136 049 p	623 085 p
Passenger transport services	694 943 p	93 081 p	788 024 p
Air passenger transport services	195 379 p	55 098 p	250 477 p
Railways passenger transport services	5 376 p	.. p	5 376 p
Road passenger transport services	490 320 p	37 983 p	528 303 p
Water passenger transport services	3 869 p	.. p	3 869 p
Passenger transport supporting services	26 651 p	111 p	26 762 p
Transport equipment rental services	11 520 p	.. p	11 520 p
Travel agencies and other reservation services industry	30 550 p	893 p	31 443 p
Cultural services	5 707 p	19 047 p	24 754 p
Sports and recreation services	12 744 p	36 877 p	49 620 p
Country-specific tourism characteristic goods	633 764 p	111 699 p	745 463 p
Country-specific tourism characteristic services	..	..	..
Other consumption products	230 146 p	1 450 p	231 596 p
Tourism connected products	..	..	..
Non-tourism related consumption products	..	..	..
<b>Non-consumption products</b>	..	..	..

.. Not available; p Provisional data

Source: OECD Tourism Statistics (Database).

StatLink  <http://dx.doi.org/10.1787/888934077464>



**From:**  
**OECD Tourism Trends and Policies 2020**

**Access the complete publication at:**  
<https://doi.org/10.1787/6b47b985-en>

**Please cite this chapter as:**

OECD (2020), "Mexico", in *OECD Tourism Trends and Policies 2020*, OECD Publishing, Paris.

DOI: <https://doi.org/10.1787/525e83e3-en>

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