

# Mexico

## Tourism in the economy and outlook for recovery

Tourism is a significant component of the Mexican economy, directly accounting for 8.0% of national GDP and 5.8% of the total workforce in 2019. The impacts of the pandemic saw tourism's contribution to GDP fall to 6.3% in 2020 or MXN 1.5 billion. Tourism employment fell by 12.3% to 2.0 million employees, or 5.3% of the workforce. Travel exports represented 77.5% of total service exports in 2019, which fell to 64.5% in 2020.

International tourism expenditure accounted for 17.9% of total tourism expenditure in 2019. This fell to 13.4% in 2020, driven by a 46.1% decline in international overnight visitors (down to 24.3 million). A rebound was recorded in 2021 but remained 29.2% below 2019 numbers despite Mexico's top market, the United States (32% of the total market), almost returning to pre-pandemic levels.

Domestic tourism was significantly impacted by the COVID-19 pandemic, with domestic overnight visitors falling 52.7% to 48.0 million in 2020, down from a record high of 101.7 million visitors in 2019. Nights in hotels and similar establishments fell 52.4% to 83.1 million.

Mexico expects international tourism expenditure to return to 2019 levels in 2022.

## Tourism governance and funding

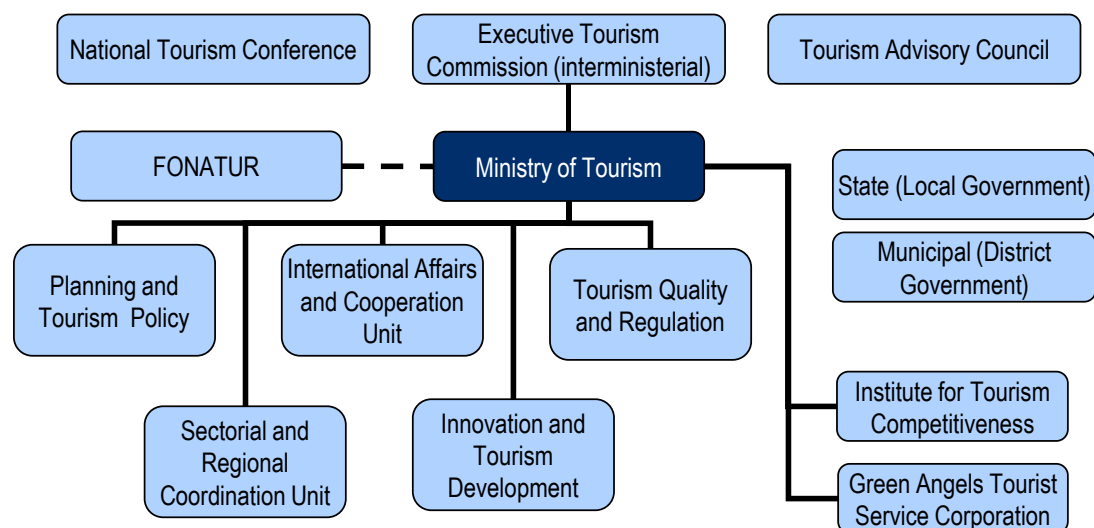
The Ministry of Tourism is responsible for leading the design and implementation of public policies to strengthen tourism development. This includes promoting innovation in the sector, improving the quality of tourism services and the competitiveness of national tourism, and promoting strategies that articulate governmental priorities and contribute to the sustainable and inclusive growth of tourism. FONATUR is Mexico's agency for the development of tourism investment.

Three co-ordination mechanisms contribute to formulating strategies and actions to achieve a comprehensive development of national tourism activity. These mechanisms are:

- The Executive Tourism Commission, an inter-ministerial body whose purpose is to fully understand and resolve tourism-related matters.
- The Tourism Advisory Council, whose purpose is to suggest strategic responses and co-ordinate actions with the agencies of the Federal Government, with the full participation of the public and private sectors, to achieve comprehensive development of tourism activity.
- The National Tourism Conference, a co-ordinating body between the three levels of government, is in charge of establishing the policy, planning and programming of tourist activity throughout Mexico.

In the Ministry of Tourism, the Tlatocan, or 'Great Council', for tourism sustainability has been established, which brings together more than 130 participants. Among these are dependencies of the Mexican government, international organisations, civil society, indigenous communities, social enterprises, private companies and academia.

## Mexico: Organisational chart of tourism bodies



Source: OECD, adapted from the Ministry of Tourism, 2022.

## Tourism policies and programmes

The Tourism Sectorial Programme 2020-24 (PROSECTUR) is the framework that governs National Tourism Policy in Mexico. It derives from and relates to the National Development Plan 2019-24. PROSECTUR contains four priority objectives:

- Guarantee a social approach and respect for human rights in tourism.
- Promote the balanced development of tourism destinations in Mexico.
- Strengthen the diversification of tourism markets at national and international levels.
- Promote sustainable tourism in the national territory.

PROSECTUR involves social, ethical and economic redevelopment aimed at promoting tourism as a right that includes all population sectors, especially the most vulnerable. The goal is for tourism activity to permeate all regions, destinations and communities as a tool for social integration and reconciliation to create well-being for all. A report has been undertaken on the progress and results obtained during the fiscal year 2020 in regard to the fulfilment of the priority objectives and well-being goals contained in the PROSECTUR framework.

In 2020, the Ministry of Tourism launched the Sustainable Tourism Strategy 2030 in close co-ordination with different government actors, civil society, international organisations, academia, the private sector, and local communities. The Strategy's objective is to transform the COVID-19 crisis into an opportunity to generate a radical change in tourism. The Strategy aims to make Mexico's destinations benchmarks for sustainable, resilient tourism, encouraging sustainable consumption and production value chains, local communities' engagement, and biodiversity preservation. It will prioritise the achievement of the Sustainable Development Goals in the tourism economy, with the long-term aim being that future generations will continue to benefit from natural resources that attract tourists. Lines of action include:

- **Promoting sustainable mobility and the concept of 'zero emissions tourism':** Under this action, tourist bicycle lanes are developed to connect local communities where visitors can travel to natural and cultural destinations. For example, Ciclovía Maya, the largest tourist bikeway in the

world, will connect and integrate economic activities for dozens of local communities in the Yucatan Peninsula.

- **Creating solutions for the integrated management of solid waste focused on the goal of zero waste:** This includes implementing local models for integrated solid waste management, seeking to generate zero waste and creating destinations free of single-use plastics.
- **Investing in and promoting the sustainable tourism offer:** this will be done on multi-channels and new innovative marketing platforms, seeking virtual and physical presence in national and international spaces and events.

## Statistical Profile

### Mexico: Domestic, inbound and outbound tourism

	2017	2018	2019	2020	2021
<b>TOURISM FLOWS, THOUSAND</b>					
<b>Domestic tourism</b>					
Total domestic trips	..	..	..	..	..
Overnight visitors (tourists)	95 600	100 445	101 749	48 042	..
Same-day visitors (excursionists)	..	..	..	..	..
Nights in all types of accommodation	..	..	..	..	..
Hotels and similar establishments	156 765	166 707	174 610 p	83 122	..
Other collective establishments	..	..	..	..	..
Private accommodation	..	..	..	..	..
<b>Inbound tourism</b>					
Total international arrivals	99 349	96 497	97 406	51 128	55 301
Overnight visitors (tourists)	39 291	41 313	45 024	24 284	31 860
Same-day visitors (excursionists)	60 058	55 184	52 382	26 845	23 441
Top markets					
United States	10 340	10 496	10 511	5 151	10 240
Canada	1 985	2 155	2 310	976	504
Spain	377	386	392	100	221
France	261	287	305	116	157
United Kingdom	563	591	581	104	125
Nights in all types of accommodation	..	..	..	..	..
Hotels and similar establishments	90 778	93 323	97 151	43 614	..
Other collective establishments	..	..	..	..	..
Private accommodation	..	..	..	..	..
<b>Outbound tourism</b>					
Total international departures	94 274	86 280	82 752	36 056	32 836
Overnight visitors (tourists)	19 067	19 748	19 810	7 345	11 544
Same-day visitors (excursionists)	75 208	66 531	62 942	28 710	21 292
Top destinations					
..	..	..	..	..	..
..	..	..	..	..	..
..	..	..	..	..	..
..	..	..	..	..	..
..	..	..	..	..	..
<b>TOURISM RECEIPTS AND EXPENDITURE, MILLION USD</b>					
<b>Inbound tourism</b>					
Total international receipts	22 467	23 803	25 848	11 448	..
International travel receipts	21 336	22 526	24 573	10 996	..
International passenger transport receipts	1 131	1 276	1 274	453	..
<b>Outbound tourism</b>					
Total international expenditure	13 647	14 074	12 300	4 286	..
International travel expenditure	10 840	11 230	9 881	3 475	..
International passenger transport expenditure	2 807	2 844	2 419	811	..

.. Not available; p Provisional data

Source: OECD Tourism Statistics (Database).

StatLink  <https://stat.link/8d46gc>

## Mexico: Enterprises and employment in tourism

	Number of establishments	Number of persons employed				
	2020	2017	2018	2019	2020	2021
<b>Total</b>	..	<b>2 278 723</b>	<b>2 284 551</b>	<b>2 285 690 p</b>	<b>2 005 652 p</b>	..
<b>Tourism industries</b>	<b>113 038</b>	<b>1 584 886</b>	<b>1 616 908</b>	<b>1 643 684 p</b>	<b>1 424 998 p</b>	..
Accommodation services for visitors	..	194 909	198 977	200 230 p	204 693 p	..
Hotels and similar establishments	24 692	..	..	..	..	..
Food and beverage serving industry	81 149	633 464	651 624	665 757 p	549 719 p	..
Passenger transport	..	566 861	575 996	581 457 p	511 631 p	..
Air passenger transport	..	29 550	30 801	30 980 p	27 842 p	..
Railways passenger transport	..	1 018	990	991 p	961 p	..
Road passenger transport	..	534 569	542 367	547 619 p	481 977 p	..
Water passenger transport	..	1 724	1 838	1 867 p	851 p	..
Passenger transport supporting services	..	3 510	3 456	3 321 p	2 951 p	..
Transport equipment rental	..	4 468	5 185	5 411 p	4 946 p	..
Travel agencies and other reservation services industry	7 197	16 040	14 976	14 557 p	12 323 p	..
Cultural industry	..	37 287	37 554	37 691 p	25 297 p	..
Sports and recreation industry	..	56 825	56 218	54 440 p	42 031 p	..
Retail trade of country-specific tourism characteristic goods	..	71 522	72 922	80 820 p	71 407 p	..
Other country-specific tourism industries	..	..	..	..	..	..
<b>Other industries</b>	..	<b>693 837</b>	<b>667 643</b>	<b>642 006 p</b>	<b>580 654 p</b>	..

.. Not available; p Provisional data

Source: OECD Tourism Statistics (Database).

StatLink  <https://stat.link/0lw287>

## Mexico: Internal tourism consumption

Million MXN

	2020		
	Domestic tourism expenditure	Inbound tourism expenditure	Internal tourism consumption
<b>Total</b>	..	..	..
<b>Consumption products</b>	<b>2 043 757 p</b>	<b>317 250 p</b>	<b>2 361 007 p</b>
Tourism characteristic products	1 862 848 p	316 455 p	2 179 304 p
Accommodation services for visitors	490 782 p	122 859 p	613 641 p
Food and beverage serving services	397 045 p	71 337 p	468 382 p
Passenger transport services	409 879 p	37 185 p	447 064 p
Air passenger transport services	113 354 p	16 662 p	130 016 p
Railways passenger transport services	5 718 p	..	5 718 p
Road passenger transport services	287 661 p	20 523 p	308 184 p
Water passenger transport services	3 147 p	..	3 147 p
Passenger transport supporting services	19 576 p	65 p	19 641 p
Transport equipment rental services	10 213 p	..	10 213 p
Travel agencies and other reservation services industry	13 120 p	509 p	13 628 p
Cultural services	8 893 p	8 623 p	17 516 p
Sports and recreation services	7 847 p	15 877 p	23 724 p
Country-specific tourism characteristic goods	505 494 p	60 001 p	565 495 p
Country-specific tourism characteristic services	..	..	..
Other consumption products	180 909 p	794 p	181 703 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  <https://stat.link/bxd7vu>



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