

Meeting with investors

MIGUEL TORRUCO

Secretary of Tourism of the Government of Mexico

Chicago, United States of America

May, 2023



TURISMO

SECRETARÍA DE TURISMO

México



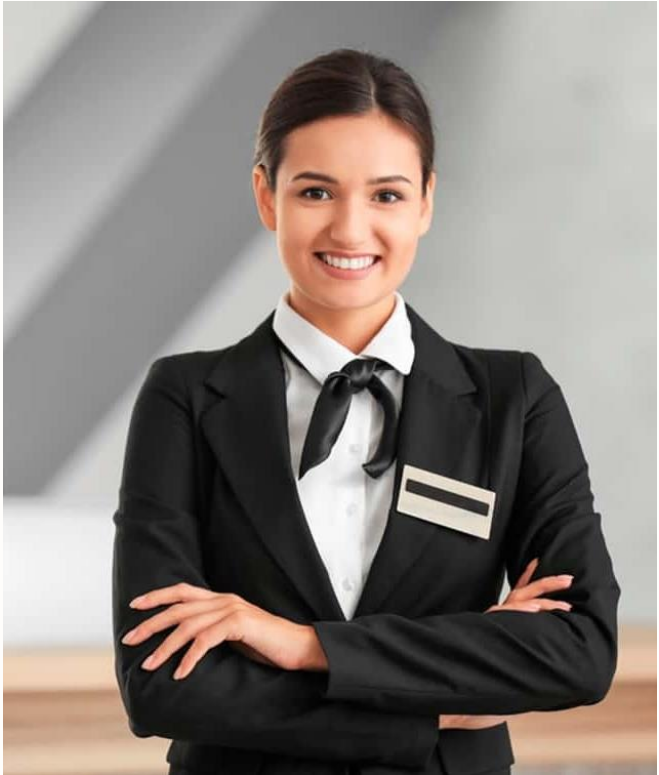
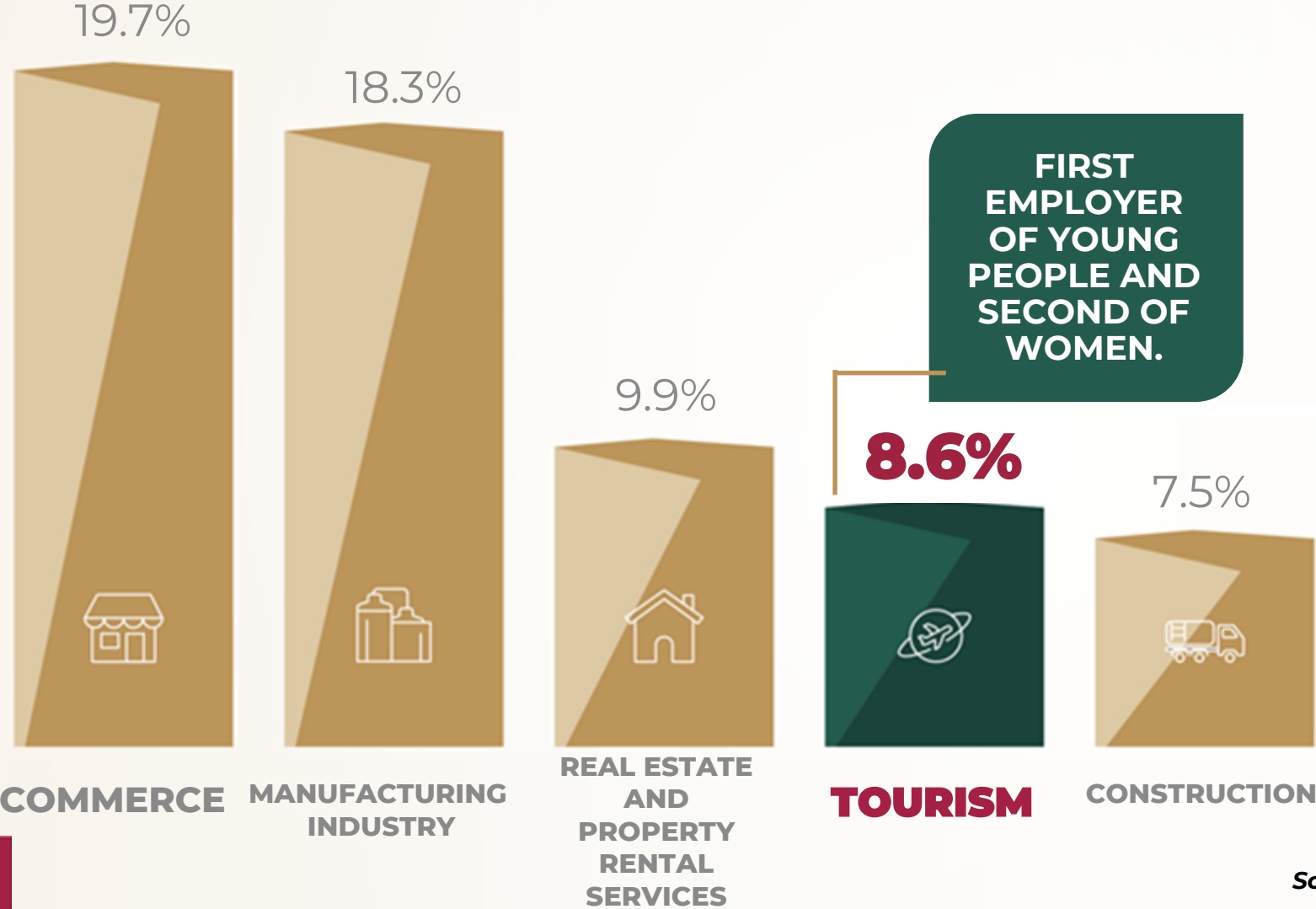
2023
AÑO DE
Francisco
VILLA

EL REVOLUCIONARIO DEL PUEBLO

WE ARE BACK ON TRACK



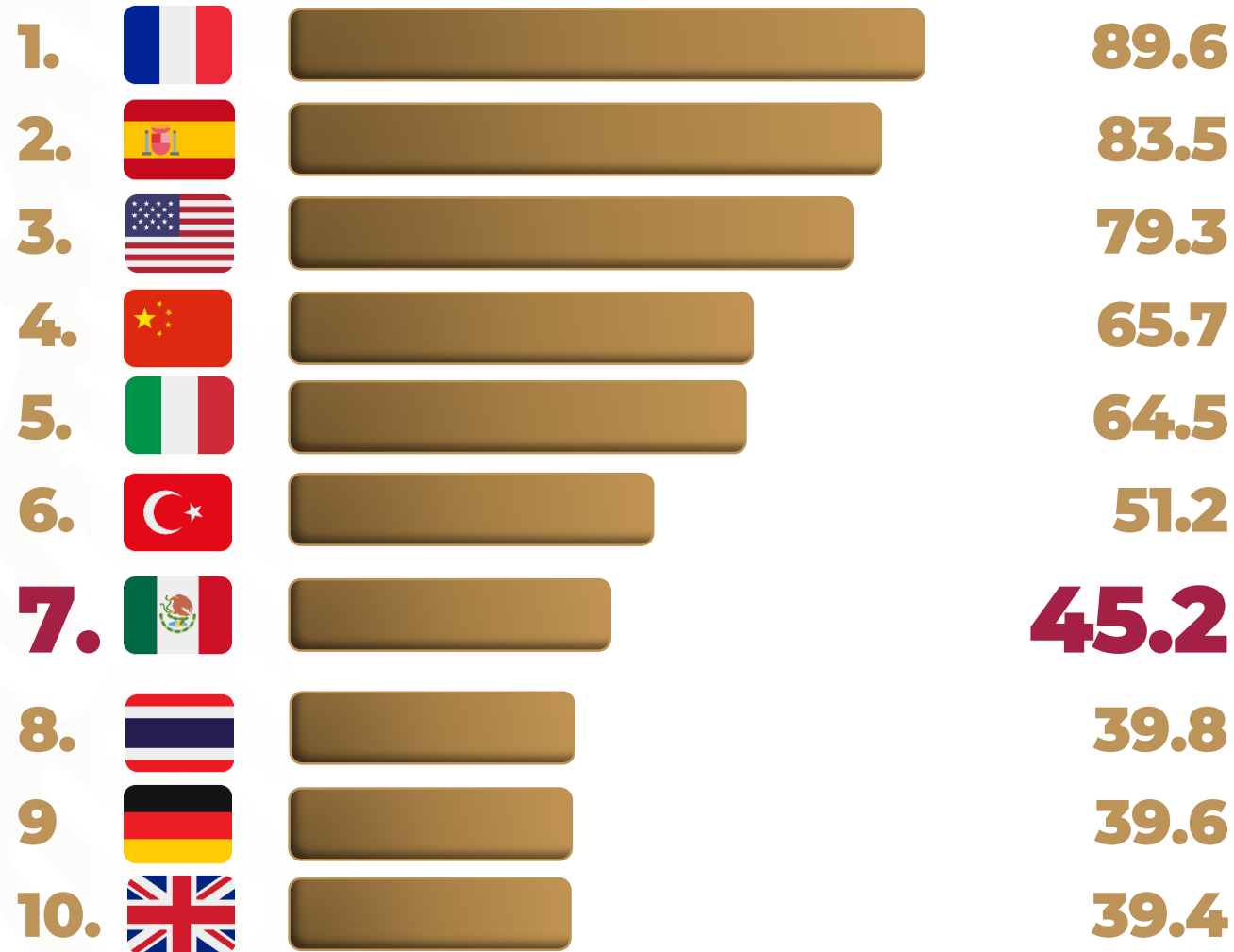
THE IMPACT OF TOURISM IN THE ECONOMY*



Source: Results of the Mexico Tourism Satellite Account 2019.

INTERNATIONAL TOURIST ARRIVALS BY AIR

2019
(Million)



Source: World Tourism Organization, World Tourism Barometer.

In 2020

The top ten tourism players had a **86%** contraction in inbound tourism

Mexico only **46%** thanks to:

- **NOT RESTRICTING INTERNATIONAL FLIGHTS.**
- **IMMEDIATE DESIGN AND IMPLEMENTATION OF BIOSANITARY PROTOCOLS.**
- **MAINTAINING OUR NATIONAL TRADE SHOW “TIANGUIS TURÍSTICO”.**
- **NO MASSIVE INCREASE IN DEBT.**
- **GUARANTEED ACCESS TO VACCINES.**
- **PERMANENT CONTACT WITH THE TOURISM INDUSTRY.**

BALANCE OF THE PANDEMIC IN 2021: A GRADUAL RECOVERY

- Tourism GDP 2019 **8.6%**
Tourism GDP 2021 **7.4%**
Tourism GDP **2022 8.3%**
- Employment 2021: **4 million 264 thousand people, + 440 thousand 556 people employed** vs the fourth quarter of 2020.
- Air fleet loss 2021: **22.5%**,
Air fleet loss 2022:
(third quarter) **19.2%**
- Tourist Consumption 2021:
2.74 trillion pesos
Tourist Consumption **2022:**
3.01 trillion pesos
+13.2% vs 2021.
- Tourism Balance 2020:
7.5 billion dollars
Tourism Balance 2021:
14.6 billion dollars

Increase of 7.1 billion dollars.



UNWTO WORLD RANKING

2020

International tourist arrivals 2020 (millions)		
Lugar		
1	France	40.0
2	Italy	25.2
3	Mexico	24.3
4	United States	19.4
5	Spain	18.9
6	Turkish	15.9
7	Austria	15.1
8	Germany	12.4

2021

International tourist arrivals 2021* (millions)		
Lugar		
1	France	49.9
2	Mexico	31.9
3	Spain	31.2
4	Turkey	29.9
5	Italy	26.3
6	United States	22.1
7	Greece	14.7
8	Austria	12.7

*Figures estimated based on updated information from UNWTO.

Foreign exchange income from international visitors 2020* (billions of dollars)		
Lugar		
1	United States	72.8
2	France	32.6
3	Australia	25.8
4	United Arab Emirates	24.6
5	Germany	22.1
6	Italy	19.8
7	United Kingdom	18.8
8	Spain	18.5
9	China	14.2
10	Thailand	14.2
11	Austria	13.8
12	Canada	13.5
13	India	13.0
14	Mexico	11.0

Foreign exchange income from international visitors 2021* (billions of dollars)		
Lugar		
1	United States	68.7
2	France	40.0
3	Spain	33.1
4	Italy	24.8
5	Germany	21.5
6	Turkey	20.8
7	Mexico	19.8
8	United Kingdom	18.1

*Figures estimated based on updated information from UNWTO.



2018

Ranked 7th in Tourism

17th in Foreign exchange

40th in Average Spending



CLOSING 2022

International Tourism Receipts

\$28,016 MDD

+14% VS 2019

Foreign Direct Investment in Tourism

\$3,447.1 MDD

+216% VS 2019

Historical year for tourism

Options to invest in Mexico

Tourist Destinations in Mexico



TURISMO
SECRETARÍA DE TURISMO

México



2022 *Ricardo Flores*
Año de Magón
PRECURSOR DE LA REVOLUCIÓN MEXICANA

HUATULCO, OAXACA

IPC Huatulco, Oaxaca.

This Integrally Planned Center is part of the Sierra Madre del Sur, a mountainous region that extends to the Isthmus of Tehuantepec, in 1985 work began to turn Huatulco into the fifth IPC of FONATUR.

The IPC Huatulco is an attractive destination for European and North American visitors, as well as national tourism.

Información: www.gob.mx/fonatur



HUATULCO, OAXACA

IPC Huatulco, Oaxaca.

- FONATUR offers plots with diverse surfaces, almost 242 acres, with multifamily land uses, equipment, commercial and hotel, beautiful views of the Pacific, in Residential “Conejos” and “Mirador Chahué”
- With all the requirements to meet the investment needs, tourist demand with new luxury products which increases the value of the IPC.
- The destination receives 632.5 thousand annual tourists, 90% are nationals.
- It is the first destination in the continent to receive the certificate of Sustainable Tourism Community.



IXTAPA, GUERRERO

IPC Ixtapa, Guerrero.

In the state of Guerrero, on the coast of the Pacific Ocean, FONATUR planned and developed its second Integrally Planned Center in 1974.

This destination soon became a tourist attraction, with a thriving residential, condominium and timeshare real estate market; managing to position it internationally, receiving mainly tourists from the United States and Canada. It has also become an ideal destination for expo shows, conferences and Incentive Travel.

Información: www.gob.mx/fonatur



IXTAPA, GUERRERO

IPC Ixtapa, Guerrero.

- FONATUR offers plots with diverse areas in Palma Real Golf Course, almost 282 acres, for residential, commercial, single-family, hotel land or in condominium with exceptional views on the Pacific.
- Investment needs and tourism demand are met with new luxury products, which increase the capital gain of the IPC.
- The destination receives 1.1 million annual tourists, 89% are nationals.



LORETO, BAJA CALIFORNIA SUR

IPC Loreto, Baja California Sur.

The main objective of FONATUR is to present Loreto as an exceptional destination for tourism, due to the magnificent potential brought together by the historical wealth, beauty of its beaches and mountains creating an exceptional location for tourism.

Loreto is considered today the most important point of economic and tourist development in the region, its natural market is composed of tourists from Mexico, the United States, Canada and Europe; based around two important holiday seasons: from November to February, when it receives the visit of kayakers, ecotourism and gray whale watching; and from March to September, for sport fishing and diving.



LORETO, BAJA CALIFORNIA SUR



CIP Loreto, Baja California Sur.

- FONATUR, in the development of Loreto - Nopoló - Puerto Escondido, offers plots with diverse areas, totaling almost 160 acres , for commercial, single-family, multi-family and hotel land.
- All services are provided, meeting investment needs and tourist demand with new luxury products, increasing the capital value of the IPC, in addition to preserving extensive natural reserves
- This destination receives 145 thousand annual tourists in its hotels, 60% are national.



NUEVO VALLARTA, NAYARIT

- Nayarit, with a very high growth in private investment, mainly in hotel infrastructure, positioned themselves first place nationwide.
- The Hotel Developments are under construction with a projection to 2025, 4 complexes in the municipality of “Compostela” and 7 in “Bahía de Banderas”, offering more than 8 thousand hotel rooms.
- New investments projects were created developing real estate, hotel and residential tourism, guaranteeing certainty to investors to reach a capacity of more than 38,237 lodging units.
- In turn, by managing trainings, accessing more tourism services to provide better attention to national and international tourists.
- With the goal of obtaining a greater economic gain; achieving an amount from private investment of \$5.472 billion dollars in various high-level tourism projects and positioning Nayarit as a leader in the last four years.



CHETUMAL, QUINTANA ROO

Expansion and Maintenance of the Zaragoza Canal.

- The project aims to achieve the reactivation of the maritime southern area of Quintana Roo by expanding the length of the navigation channel that connects the Caribbean Sea with the bay of Chetumal (located 6 kilometers south of the community of Xcalak) in order to allow the passage of vessels with greater draft, as well as promoting the creation of new jobs linked to maritime and port activity through a greater capacity of vessels to the bay of Chetumal.
- Project that consists of dredging to increase the depth from 2 meters to 3 meters and the extension of 4.8 kilometers towards the interior of the bay of Chetumal to obtain a maritime passage with a total length of 6.3 kilometers.



CHETUMAL, QUINTANA ROO

Coastal of Calderitas Malecon Improvement and Urban Image Renewal

- Improve the attractions and tourist services of Calderitas's community. Providing it with better infrastructure for the enjoyment of visitors in the gastronomic area of Calderitas.



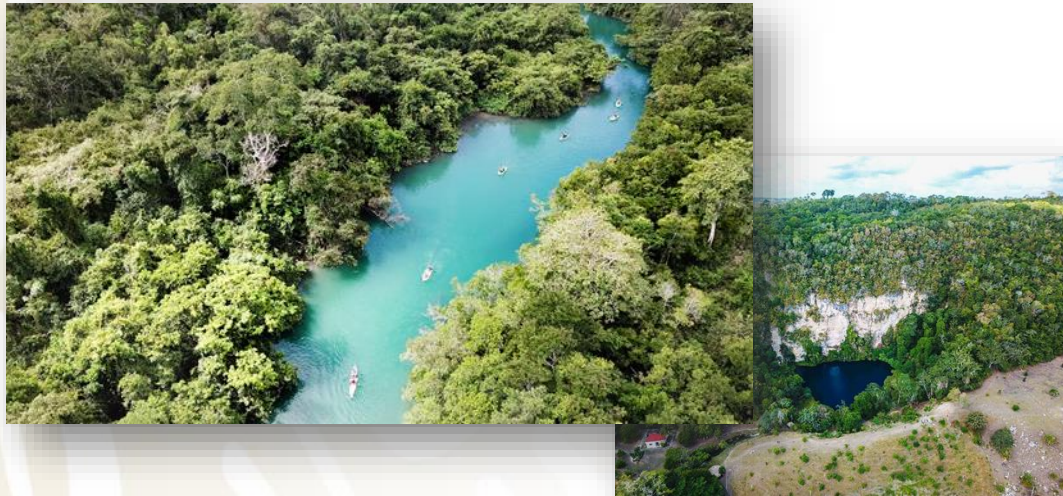
- Rehabilitation and modernization in roads, walkways, spas, restaurants any area with tourist infrastructure, improving and creating new spaces that generate a higher level of services in Calderitas
- It is intended to be developed as a center that houses tourists that visit the capital city.

Información: Secretaría de Desarrollo Agrario Territorial y Urbano (SEDATU)

CHETUMAL, QUINTANA ROO

Tourism Development Program for Río Hondo Route, Municipality of Othón P. Blanco.

- The objective of the project is to plan the Rio Hondo Route as an inclusive and sustainable tourist destination that allows it to brand itself.
- Through the proposal of strategies, actions and investments in the short, medium and long term, which promote existing tourism projects and products via the Mayan Train project, Section VI



- The project adds efforts, resources and capacities to identify, concretize and detonate strategic actions aimed at the optimal development of rural communities in the southern part of the state of Quintana Roo.
- Promoting the generation of jobs and social welfare, allowing improvement in the communities quality of life.

GENERAL FELIPE ANGELES INTERNATIONAL AIRPORT



On the 21st of march we celebrated the opening of the Felipe Angeles new International Airport. Now Mexico City has three international airports that constitute altogether the Metropolitan Airport System: the International Airport of Mexico City, the Felipe Angeles new International Airport and the International Airport of Toluca.



The ground communication system that connects Mexico City to the Felipe Angeles new International Airport is already operating and in six months there will be also a tren service that connects downtown of Mexico City to the new airport in just 46 minutes.

BARRANCAS DEL COBRE, CHIHUAHUA

Creel's Airport.



Aerial project that will detonate private tourism investment in the region of “Barrancas del Cobre”, taking into consideration, that due to the increase in arrivals of national and international flights, it will be necessary to increase the offer of lodging, recreational centers and restaurants.

The benefits of the project are:

- Creation of 4,000 direct and indirect jobs.
- Reach a potential market of 2 million tourists a year, 15% by air.
- 470 additional rooms.
- Economic gain of 1,500 million additional pesos.

RENOVATION OF THE CHETUMAL AIRPORT



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SECRETARÍA DE TURISMO



The Chetumal Airport was incorporated into the ASA network in 1974, and no improvements had been made to it since then.

The airport modernization works include:

- Additional 2,485 m² of the terminal building to service 600 passengers at peak hour.
- Construction of a new control tower.
- Modernization of the fire-fighting system.
- Shaping of runway safety strips.

Total investment: 149 million pesos.

RENOVATION OF THE AIRPORT OF TEPIC, NAYARIT



TURISMO
SECRETARÍA DE TURISMO



The Tepic Airport was incorporated into the airport network administered by Aeropuertos y Servicios Auxiliares (ASA) in 1991. Expansion and remodeling works are currently underway, consisting of:

- Runway extension and rehabilitation (an additional 300 meters).
- Construction of a new control tower.
- Enlargement of the passenger terminal (800 square meters more).



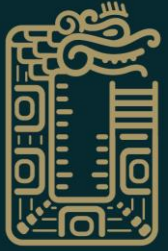
Total investment: 120 million pesos.

SAN LUIS POTOSI, S.L.P.

Huasteca Potosina's Airport expansion

- Will have the capacity to receive a greater flow of passengers and having routes to main destinations that bring tourism to the region, such as CDMX and Monterrey.
- Master Plan's Elaboration for Integral Tourism Development in the Huasteca Potosina, where the strategies will be defined with a planning looking to 2040, this includes: improvement in basic services such as electricity, drinking water, water sanitation, paving, solid waste management, digital connectivity, signage, among others.
- Design of a master plan for a Sustainable Tourism development center, which includes infrastructure and equipment for the services of tourism in an integral way.





TREN MAYA

TSÍIMIN K'ÁAK



TREN MAYA

14 Pueblos Mágicos	 PUEBLOS MÁGICOS	50 Archaeological Sites	
 PATRIMONIO MUNDIAL WORLD HERITAGE PATRIMONE MONDIAL	 UNESCO	6 World Heritage Sites	
18 Paraísos Indígenas	PARAÍOS  INDÍGENAS		
	29 Complementary Destinations		

5 STATES

Yucatán, Quintana Roo,
Campeche, Tabasco and Chiapas

1,554 km/
965 miles

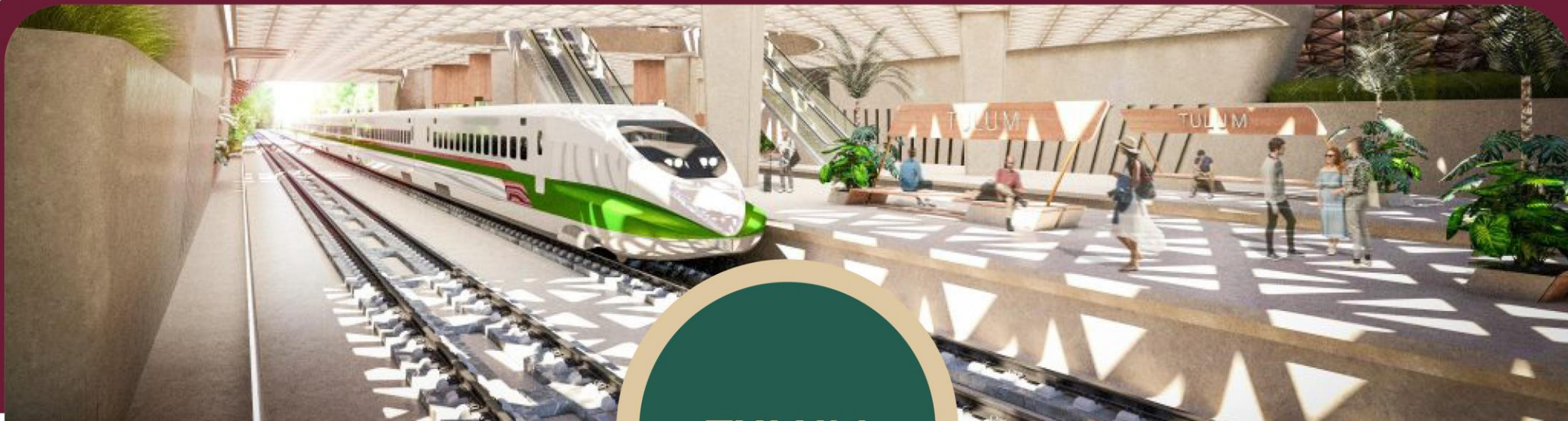
21 TRAIN STATIONS

14 LOCAL STATIONS

117 EXPERIENCES

PALENQUE





TULUM



FONATUR'S STOCK

2022



TURISMO

SECRETARÍA DE TURISMO



Ricardo
2022 Flores
Año de **Magón**

PRECURSOR DE LA REVOLUCIÓN MEXICANA

Fonatur's Territory



TOTAL VALUE
Estimated properties
managed by FONATUR

5 billion USD

6 Integrally Planned Centers (**CIP**)
2 Tourism Projects (**PTI**)

Total Stock



CIP
Loreto
Available: 11,400 ac
Value: \$1 billion USD
Strategic Lots: 8,117 ac
Value: \$706 M USD

PTI
Cozumel
Available: **17 ac**
Value: \$20 M USD

CIP
Huatulco
Available: 2,100 ac
Value: \$450 M USD
Strategic Lots: 791 ac
Valor: \$145 M USD

Available: 13,590 ac
Value: 1,500 M USD
Strategic Lots: 8,925 ac
Value: \$871 M USD

CIP Loreto, Baja California Sur

Loreto

Polígono II

 **200** ac
Estimated Value
\$30 M USD

Nopoló

 **833** ac
Estimated Value
\$100 M USD

Puerto Escondido

Golden Beach (eastern zone)

 **7,084** ac
Estimated Value
\$576 M USD



Available: 11,367 ac
Value: \$1 billion USD

Strategic Lots: 8,117 ac
Value: \$706 M USD

An aerial photograph showing a long, straight road that runs parallel to a large body of water. The water is a deep blue-green color. In the background, there are rugged, mountainous hills. The land to the right of the road is arid and sparsely vegetated. A small airport runway is visible on the right side of the road. The text "FONATUR LORETO 'POLÍGONO II'" is overlaid in white, bold, sans-serif font in the center of the image.

**FONATUR
LORETO
“POLÍGONO II”**



FONATUR NOPOLÓ



FONATUR PUERTO ESCONDIDO



CIP Huatulco, Oaxaca



Golf Course Tangolunda



205 ac
Estimated Value
\$30 M USD



La Entrega



287 ac
Estimated Value
\$75 M USD



Cacaluta Bay



299 ac
Estimated Value
\$40 M USD

Available: 2,063 ac
Value: \$450 M USD

Strategic Lots: 791 ac
Value: \$145 M USD

An aerial photograph of a beach and ocean. The top part of the image shows a sandy beach with some greenery and a small structure. The middle part shows the ocean with white foam from waves breaking onto the shore. The bottom part shows the dark blue-green water of the ocean. The text is overlaid in the center of the image.

FONATUR
CAMPO DE GOLF
“TANGOLUNDA”



An aerial photograph of a coastal area. In the center, a cluster of modern, multi-story buildings is situated on a rocky peninsula. The buildings are surrounded by sparse, dry-looking vegetation. The peninsula is bordered by dark blue water on the right and white-capped waves crashing against the rocks on the left. A winding road is visible on the land behind the buildings. In the distance, a larger body of water is visible with a few small boats and a small town on the far shore. The overall scene is a mix of natural ruggedness and modern development.

FONATUR LA ENTREGA



FONATUR BAHÍA CACALUTA



PTI Cozumel, Quintana Roo



Available: 20 ac
Value: \$20 M USD

Cozumel 



FONATUR PTI COZUMEL



THANK YOU

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