

Realizing the Full Value of Tourism from Mexico to the United States



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Executive Summary

“Tourism is the number one service that we export, and that means jobs.”

—President Barack Obama, January 2012

A Renewed Focus on International Travel and Tourism after the Great Recession

As the U.S. takes steps to regain the nation’s prominence as an international tourism destination, the federal government needs to take a number of key steps to realize the full value of tourism from our nation’s number two tourist market: **Mexico**. Although the U.S. welcomed 13.42 million visits from Mexico in 2011, there is still tremendous untapped potential for the U.S. in the Mexican market. The increased tourism expenditures and resulting job creation in the Southwest, as well as the rest of the nation, will only result from a shift in the nation’s strategic approach toward Mexico’s growing middle class, enhanced efficiencies at our land ports of entry, and improvements in visa processing at our embassy and consulates in Mexico.

The good news is that the federal policy framework exists to meet this need for our economy, and part of the solution is in plain sight. Recognizing that the nation’s share of global travel spending had fallen from 17.2 % in 2000 to an estimated 11.6% in 2010, a new public-private partnership, “Brand USA,” has been developed to restore the U.S.’ predominance in tourism. The idea is that attracting more international travelers to the United States would boost much-needed job creation. As these policies come into focus, there exists a need to focus on key markets.

Mexican Tourism to the U.S.: A Large, Natural, and Wealthy Market...Right Next Door

Though the recent Executive Order focuses the federal government’s efforts on increasing tourism from China, India and Brazil, the U.S. has an ongoing opportunity to take advantage of its strong political and commercial ties with Canada and Mexico, its two largest visitor markets and next door neighbors. Mexico and Canada represented an impressive 55% of all international arrivals in 2010 and 21% of total spending from international incoming visitors, according to data from the U.S. Department of Commerce’s Office of Travel and Tourism Industries (OTTI).

Focusing federal efforts on increasing *Mexican* tourism offers particular advantages that may not be readily apparent and even counterintuitive to most Americans. To begin with, despite our recent shared security challenges, it is important to keep in mind that Mexico is an economic powerhouse. The country has the 12th largest economy in the world and boasted the second fastest growth of any OECD country in 2011. Trade with Mexico supports six million jobs in the United States, and the country is the United States’ second largest export market after Canada. And finally, according to Mexican analysts Luis de la Calle and Luis Rubio, a majority of Mexicans can now be considered to be “middle class” by various measures. This is truly a remarkable achievement that has gone virtually unnoticed and gives an indication of what the size of the potential tourism market *might* be in Mexico...if we would take the necessary steps to realize this latent value.

Key Challenges, Opportunities and Policy Considerations

While the U.S. Departments of Commerce and Interior are spearheading federal efforts to increase tourism, other agencies also have key roles to play with respect to Mexican tourism. This is particularly true of the Departments of State (Embassy and Consulates) and Homeland Security (land ports of entry). Five key steps will go a long way toward unlocking the tremendous economic value “hidden in plain sight” represented by Mexican tourism.

1. Include Mexico together with China, Brazil and India as Commerce and Interior’s targets for tourism promotion. Mexico is a large (113 million people), middle-income country with the 12th largest economy in the world. It is hosting the G-20 conference this year and is an economic powerhouse in its own right. While the country currently ranks second in terms of visits to the U.S. and has the fourth highest tourism expenditures of any country (according to 2010 statistics), more needs to be done from a strategic approach with respect to Mexico. The U.S. needs to make sure it is not unduly preventing law-abiding tourists from enjoying its many attractions and tourism products and that visits from Mexico help to rebuild our nation’s economy following the Great Recession.

2. Actively promote the United States tourism product in Mexico. There is an overall consensus by tourism experts that there is a latent demand for travel to the US by Mexicans. Yet while Mexico is to some degree a natural tourism market for our country, there is currently no significant and concerted effort on the part of the federal government to promote US tourism in Mexico. Promotional efforts in Mexico have historically been led by U.S. cities and states, and though Brand USA is just now getting under way, the partnership needs to move decisively and rapidly to turn Mexican tourists’ attention northward in the face of stiff global competition for Mexican visitors and expenditures, mostly from the European Union.

3. Revamp the processing of tourist visas in Mexico to make it fairer, faster and safer while maintaining security standards. Visa requirements and processes are expensive, onerous, and often serve as a deterrent for Mexican visitors, effectively “leaving money on the table” for communities in the Southwestern United States and even in the interior. Mexican tourists can legally enter the United States after applying for and being granted a Border Crossing Card at either the U.S. Embassy in Mexico City or at one of several U.S. consulates located throughout Mexico. Curiously, neither Mexico nor Canada is part of the U.S. Visa Waiver Program, which grants citizens from 36 different countries the right to enter the United States for a maximum of 90 days without a visa.

4. Upgrade border infrastructure and invest in more staff to operate land ports of entry efficiently. If we are serious about not leaving money on the table, the upgrading of the dozens of ports of entry along the border with Mexico should be accelerated. With a multi-billion dollar deficit in border infrastructure, the various border regional master plans—led by the State Department and Mexico’s Foreign Ministry—need to give greater weight to upgrading northbound and southbound passenger vehicle and pedestrian crossings. This is clearly a win-win situation for both nations. This emphasis should include enhanced staffing, technology, infrastructure and communications.

5. Actively facilitate Mexican tourism environments at the land ports of entry. As the official U.S. gateways for Mexican tourists, much more can be done to assure that Mexican tourists receive a just, efficient, and courteous welcome to the United States of America. The new Ready Lanes at our ports of entry are an excellent start, but more needs to be done to capitalize on the entire economic potential of tourism from Mexico.

International Travel and Tourism to the US

“The U.S. is home to some of the most exciting and awe-inspiring tourism destinations in the world, attracting people from every corner of the globe who will spend their dollars in our hotels, restaurants and shops...”

—Congressman Sam Farr, Congressional Travel and Tourism Caucus Co-Chair

Before beginning the specific discussion of Mexican tourism to the U.S., we will provide an idea of the size and scope of international travel and tourism to the United States. According to the International Trade Administration (ITA) of the U.S. Department of Commerce, in 2011 the U.S. welcomed 62 million international visitors, an increase of more than four percent from the previous year. Additionally, in 2011 international visitors spent more than \$153 billion throughout the United States, up more than \$19 billion from 2010. In addition, in 2011 travel and tourism exports accounted for 25% of U.S. services exports and 7% of all U.S. exports. The U.S. actually enjoys a \$42 billion tourism trade balance *surplus*, something which cannot be said of many other commercial trade relationships in which the U.S. is involved.

Notwithstanding these remarkable figures, the U.S. is far from reaching the 17.2% in total global travel spending that the nation enjoyed in 2000. In 2010, the U.S. received an estimated 11.6% of global travel spending. Geoff Freeman, CEO of the U.S. Travel Association (USTA) even, declared 2000-2010 the “lost decade” for international tourism to the United States. According to a June 2011 article in *The Atlantic*, “How Tourism Can Help Save the U.S. Economy,” because of our failure to keep up with global growth in international travel, the U.S. economy has endured a number of economic losses: 68.3 million visitors, \$509 billion in spending, 441,000 jobs, \$270 billion in lost trade surplus and \$32 billion in lost tax revenue.

Another challenge for the U.S. is that *advanced* economies are losing their tourism market share of global arrivals to *emerging* economies such as China, Malaysia and Thailand, according to the ITA. With the rise of new players in the global competition for international visitors, it is crucial for the U.S. to pick up the pace when it comes to attracting tourists and their spending power.

In light of the overall decline in international tourism numbers and out of the need to generate jobs in as cost-effective a manner as possible, the “Brand USA” public-private partnership (which developed out of the Corporation for Travel Promotion) was established on March 4, 2010 when President Obama signed the Travel Promotion Act into law. This federal effort seeks to attract more international travelers to the U.S. and, it is hoped, contribute to much-needed job creation.

One of the short-term goals of this first-ever national travel promotion and communications program is to expand the number of countries included in the Visa Waiver Program, a program administered by the U.S. Department of Homeland Security in which visitors to the U.S. may visit for 90 days without obtaining a visa first. The program aims to expedite visa processing primarily for citizens of countries with growing middle classes (China, India and Brazil have been targeted by the Obama Administration as particularly promising tourism markets). For various reasons, neither Mexico nor Canada is included in the Visa Waiver Program (see Figure 1 below).

Figure 1: Countries included in the U.S. Visa Waiver Program

Andorra	France	Liechtenstein	Singapore
Australia	Germany	Lithuania	Slovakia
Austria	Greece	Luxembourg	Slovenia
Belgium	Hungary	Malta	South Korea
Brunei	Iceland	Monaco	Spain
Czech Republic	Ireland	New Zealand	Sweden
Denmark	Italy	Norway	Switzerland
Estonia	Japan	Portugal	the Netherlands
Finland	Latvia	San Marino	United Kingdom

Source: U.S. Department of Homeland Security

Mexico's Federal Tourism Promotion: A Model to Emulate?

U.S. overseas tourism promotion has historically been led by state and local entities such as convention and visitors bureaus and state tourism agencies. Mexico's efforts are led by the federal government's Ministry of Tourism (SECTUR), which enjoys a cabinet-level position and works to boost international tourism to Mexico. The ministry has a budget of approximately \$328 million dollars.

SECTUR has engaged in tourism marketing campaigns throughout the world. A recent effort that has made a significant media impact was the "México: The Royal Tour" campaign. President Felipe Calderón hosted the campaign himself and introduced potential visitors to some of Mexico's most appealing tourist sites. The Royal Tour was produced and broadcast in the U.S. by PBS at no cost to Mexico's government due to the sponsorship of three private entities. According to SECTUR, the campaign had an audience of 100 million people in the U.S. and 300 million people in rest of the world. Innovative partnerships may serve as a model for the United States as our federal government puts together its tourism promotion in Mexico and the rest of the world.



President Calderón promotes tourism to Mexico. Screen shot from "Mexico: The Royal Tour."

The First Challenge: Promoting U.S. Tourism in Mexico

Is the United States Leaving Money on the Table with Mexican Tourism?

As the U.S. economy struggles to create high-quality jobs, and as the international travel and tourism sector assumes more importance, the country needs to attract every dollar of value in its relationship with our second largest visitor market: Mexico. Indeed, there is no other relationship for the United States that is as dismissed and yet ironically as crucial and lucrative for our country's economic well-being as the one with Mexico, a country with a population of over 113 million people, our next door neighbor and one of our most significant commercial partners.

It is fundamental to understand Mexico's global importance as an economic powerhouse. As already noted, the country has the 12th largest economy in the world and boasted the second fastest growth of any OECD country in 2011. Trade with Mexico supports six million jobs in the United States, and the country is the United States' second largest export market after Canada. Mexico is a member of both the Organization for Economic Co-operation and Development (OECD) and the Group of 20 (G-20), which it is hosting in 2012. With the exception of Russia, Mexico's people are wealthier than those of any of the BRICs. Furthermore, in a recent analysis, Goldman Sachs estimates that the Mexican economy will become the world's seventh largest by 2020. Given that given its rapidly advancing infrastructure, increasing and more mobile middle class and rapidly declining poverty rates, it is expected to have a higher GDP per capita than all but three European countries by 2050.

In 2010, the Mexican economy grew by 5.4%, recovering much of the ground it had lost in 2009 due to the recession in the United States. After last year's outstanding recovery, in 2011 Mexico's economy grew approximately 4%. Furthermore, according to Mexico's National Institute of Geography and Statistics (INEGI), its official national unemployment rate was 5.04% in 2011. And finally, according to Mexican analysts Luis de la Calle and Luis Rubio, a majority of Mexicans can now be considered "middle class" by various measures. This is truly a remarkable achievement that has gone virtually unnoticed and indicates what the size of the potential tourism market *might* be in Mexico, if the United States would facilitate the necessary steps to realize this latent value.

If we look at how the U.S. strategizes its tourist flow from Mexico, it is important to consider that although Brand USA is a long overdue *national* tourism marketing plan, it has yet to articulate an acknowledgement of the strong commercial ties that the U.S. has with Canada and Mexico, its top two largest visitor markets. Together, our next door neighbors represent an impressive 55% of all international arrivals in 2010 and 21% of total spending by international visitors in the U.S.

Despite the heretofore lack of federal-level tourism promotion, to provide a more specific idea of what Mexican tourism means to our country, we begin with the little-appreciated fact that Mexico is the second largest international visitor market for the United States; according to the most recent visitation statistics generated by ITA (see Figure 2 below). In 2011, there were a total of 13.42 million visits to the U.S. from Mexico, essentially the same from the previous year. Mexican tourists injected \$8.7 billion into our economy during 2010. More arrivals from Mexico are registered to our country

every year than arrivals from the BRIC countries (Brazil, Russia, India and China) combined, as well as all combined arrivals from such European economic powers as Great Britain, Germany, France and Italy.

Figure 2: Top 10 Markets, 2010 - 2011 International Visitation

Rank '10	Rank '11	Country	2010 Arrivals	Change 2009 - 2010	2011 Arrivals	Change 2010 - 2011
1	1	Canada	19.96 Million	11%	21.03 Million	5%
2	2	Mexico	13.47 Million	2%	13.42 Million	0%
3	3	United Kingdom	3.85 Million	-1%	3.84 Million	0%
4	4	Japan	3.39 Million	16%	3.25 Million	-4%
5	5	Germany	1.73 Million	2%	1.82 Million	6%
6	7	France	1.34 Million	11%	1.5 Million	12%
7	6	Brazil	1.20 Million	34%	1.51 Million	26%
8	8	South Korea	1.11 Million	49%	1.15 Million	3%
9	10	Australia	904000	25%	1.04 Million	15%
10	11	Italy	838,000	11%	891,571	6%
11	9	China	802,000	53%	1.09 Million	36%

Source: U.S. Department of Commerce, Office of Travel and Tourism Industries

And although Mexico's per capita income is among the lowest within the G-20 countries, it is impressive to note how well spending by Mexican tourists measures up to that by visitors from other countries. According to ITA's 2010 statistics (the latest available as of this writing), Mexico ranks fourth overall in total tourism spending (see Figure 3 below).

Figure 3: Top 10 Markets: 2010 International Spending in the U.S.

Rank	Country	2010 Spending	Change from 2009
1	Canada	\$20.8 Billion	29%
2	Japan	\$14.6 Billion	12%
3	United Kingdom	\$11.6 Billion	1%
4	Mexico	\$8.7 Billion	8%
5	Brazil	\$5.9 Billion	30%
6	Germany	\$5.8 Billion	4%
7	China	\$5.0 Billion	39%
8	France	\$4.1 Billion	-1%
9	India	\$4.0 Billion	12%
10	Australia	4.0 Billion	16%

Source: U.S. Department of Commerce, Office of Travel and Tourism Industries

Finally, Mexican tourism can be broken down into three large categories: "fly-in," "drive-in" and pedestrian. By far, the greatest number of Mexican visitors arrives at one of the 45 land ports of entry on our southern border with Mexico on foot, in buses or in privately owned vehicles (POVs). It is no exaggeration to suggest that this tourism is critical to local economies near the border.

According to a study by the University of Arizona on Mexican visitors to Arizona, in 2007-08 Mexican visitors spent \$2.69 billion in the state of Arizona, generating 23,400 direct jobs and 7,000 indirect jobs in the state.

While the majority of border arrivals are for shopping and “visiting friends and relatives” tourism, Mexican tourism to the United States has various additional subcategories, including types such as sports tourism. For example, the Arizona Diamondbacks have found a niche market with fans from the neighboring state of Sonora, over 200 miles to the south of Chase Ballpark in downtown Phoenix. The club even has a ticket office in Hermosillo, Sonora (along with other Arizona professional sports teams). Mexican soccer fans regularly travel to cities in the U.S. such as San Diego, Phoenix, and Dallas, to watch the Mexican national team play against the United States, as well as teams from other countries.

There are several additional factors that incentivize Mexican tourism to the U.S. and make it somewhat of a natural market for the U.S. However, this does not mean that Mexican tourism should be taken for granted. The U.S. needs to take an active role in promoting its landmarks and attractions in order to capitalize on the growing economy from our neighbors to the south.

The Second Challenge: Obtaining a US Visa

The lack of federally supported tourism promotion in Mexico can be thought of as a “soft” barrier to increased tourism from that country. A far more significant challenge is the visa process to be admitted into the U.S. This process continues to be a cumbersome constraint for Mexico’s growing middle class who want to visit our national parks, shopping malls and theme parks and stay in our hotels. As mentioned above, Mexico is not included in the U.S. Visa Waiver Program. Instead, Mexicans who wish to travel to the United States are required to apply for a Border Crossing Card, a type of B1/B2 non-immigrant visa that is specific to citizens of Mexico (see Figure 4 below).

Figure 4: Sample Border Crossing Card (B1/B2 Visa)



Source: U.S. Department of State

Before applying for a Border Crossing Card at the U.S. Embassy or consulates in Mexico, Mexican nationals are required to obtain a Mexican passport (per requirements of the United States' Western Hemisphere Travel Initiative—or WHTI—first implemented in 2007). This not only adds steps to what was already a difficult process but also an additional cost of approximately \$1800 Mexican pesos (approximately \$150 U.S. dollars, depending on the exchange rate).

An aspiring Mexican applicant then must make an appointment online and wait for a date to be set for an interview at the closest consular office, which may be the U.S. Embassy in Mexico City or one of the regional consulates. Mexico is a large country, and often these offices are at least several hours away from an applicant's place of residence.

Once a date is set, the individual gathers a number of documents to demonstrate that he or she has a strong incentive to return to Mexico following his or her stay in the United States. These documents include bank statements, utility bills, and school registration, among others. Once a date is set, the applicant is interviewed by a consular employee, who has full discretion to decide at that time if the applicant may qualify for a Border Crossing Card. If unsure, a date may be set for a second interview, where the individual is informed of the final decision.

Consular employees have considerable discretion about determining whether applicants have a strong incentive not to overstay the visa and return to Mexico before the end date granted by the U.S. government. At times documentation is taken into consideration by the consular employee, while at other times it is not. This haphazard procedure makes the entire process unclear and inconsistent, which deters many Mexicans from even considering applying. It is worth noting that if rejected, the applicant's money is not refunded, nor are the travel, which can often total several hundreds of dollars (see Figure 5 below for the official application steps).

Figure 5: Steps to attain Border Crossing Card

- STEP 1: SELECT THE VISA TYPE
- STEP 2: COMPLETE THE DS-160 ONLINE APPLICATION
- STEP 3: SCHEDULE YOUR APPOINTMENT(S) THROUGH THE APPOINTMENT CENTER AND PAY THE APPLICATION FEE
- STEP 4 : APPEAR AT THE ASC TO SUBMIT APPLICATION, FINGERPRINTS, AND PHOTO
- STEP 5: APPEAR AT EMBASSY FOR INTERVIEW
- STEP 6: APPEAR AT LOCAL DHL OFFICE TO PICK UP PASSPORT AND VISA (IF APPROVED)

Source: U.S. Embassy Mexico website

The Third Challenge: The Border Itself

Finally, another significant constraint to Mexicans visiting the United States is the border itself. Our land ports of entry with Mexico that make trade and tourism possible face a number of significant challenges. These include aging infrastructure both in the U.S. and Mexico and an often inadequate

number of Customs and Border Protection agents that are needed to staff the land ports of entry efficiently and adequately. Together these two issues typically result in wait times ranging from one to several hours to cross into the United States. This affects both Mexican tourists and U.S. citizens and legal residents returning from Mexico (see Figure 6 below).

While land ports of entry between the two countries were first envisioned to process legitimate border crossings of people, goods and services, security has assumed a more dominant role in recent years, hampering the ability of federal agencies to manage border traffic efficiently. Making matters worse, while total trade between the United States and Mexico has expanded by more than 600% since 1990, there were few advances in border infrastructure from 2000-2010, despite the enormous expansion of the post-NAFTA binational commercial relationship. This has been true for both commercial and passenger traffic. And while new ports of entry in Texas and Arizona have recently been built, the border's infrastructure continues to be outdated and at or beyond capacity.

Unfortunately, over the last several years, Mexican tourism to the southwestern United States has declined in no small part because of inefficiencies at the land ports of entry. For example, statistics maintained by Customs and Border Protection indicate that there has been a considerable decrease in legal crossings through Arizona's ports of entry over the past several years—from 28 million crossings in 2009, to 24 million in 2010, and then dropping yet again to 21.7 million in 2011.

Figure 6: Vehicles Waiting to Cross into El Paso, Texas, from Mexico

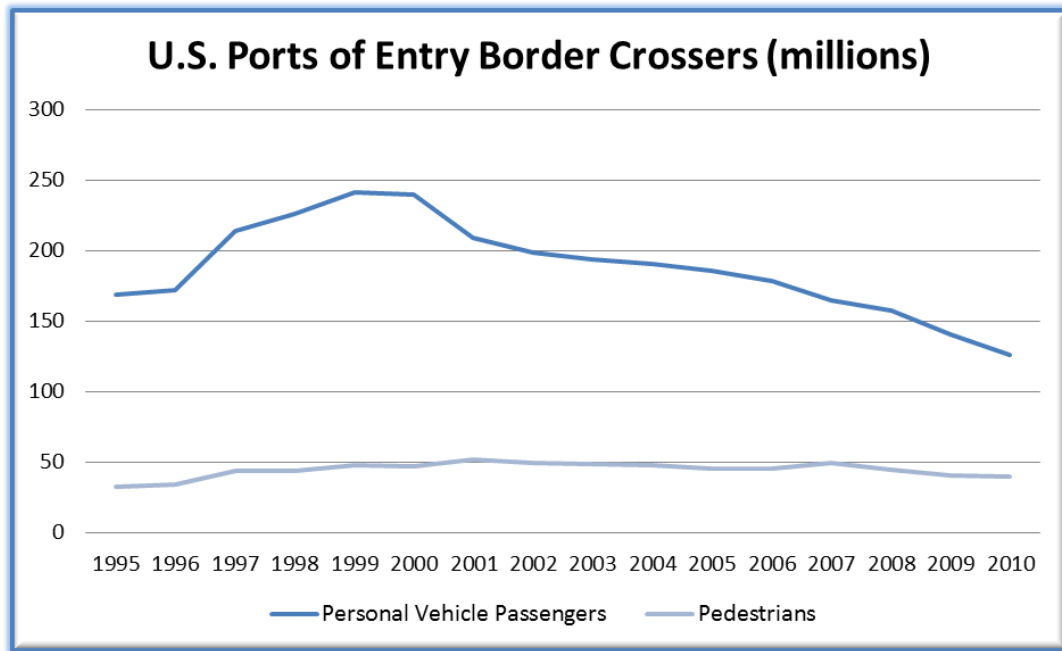


Vehicles waiting to enter El Paso from Ciudad Juarez.

Source: The Paso del Norte Group

There are additional factors that may partly explain the reasons behind this trend. In Arizona, for example, Senate Bill 1070 seems to have portrayed the state of Arizona as particularly unwelcoming to Mexicans, and the numbers above are certainly not helped by this image problem for the state among potential Mexican tourists. In addition, the recession had an impact on almost all economic activity in the developed and developing worlds, and border crossings as an expression of economic activity were no exception. Also, during the past few decades, the urban populations on both sides of the border grew rapidly even though ports of entry capacity did not expand correspondingly. All of these factors—taken together with staffing and infrastructure issues—have led to increased border congestion and wait times for both Americans and Mexicans alike and have contributed to a long-term decline in all crossings (see Figure 7 below).

Figure 7: Northbound Ports of Entry Border Crossers (1995 - 2010)



Source: U.S. Census Bureau

Yet the shared 2,000-mile border needs to be recognized as both a challenge and an opportunity. In May 2010, the U.S. and Mexico signed the 21st Century Border Management Joint Declaration with a specific focus on trade facilitation at their shared border. Recognizing the importance of fostering commercial relationships, both countries have agreed to coordinate efforts to enhance economic competitiveness by expediting lawful trade. The idea is that development of modern and secure border infrastructure will give an added boost to the region’s competitiveness in the world and attract more trade and tourism, which translates into more American jobs being sustained and created.

Poor infrastructure, inadequate staffing levels and a heavy focus on security at the U.S.-Mexico border have cost the U.S. tourism industry dearly in terms of lost opportunities with Mexican tourism. It is past time for the country’s southern border to begin meeting today’s demands, acting as a facilitator and conductor of potential Mexican tourists, so that we may capitalize on the full

potential of Mexican tourist arrivals to the U.S. If \$8.7 billion are currently spent by Mexicans in the U.S. annually, the economic impact of an efficient border crossing process could be extremely significant.

Concluding Thoughts and Policy Considerations

Although the United States and Mexico share an enormous commercial relationship and an almost 2000-mile long border, in many ways the two countries are just getting to know each other. In particular, the U.S. federal government finds itself at the beginning of a process of developing a strategy for promoting much-needed Mexican tourism to the United States. There is much to do, and it will require both a new approach and a focus on key details by various federal agencies to fully realize the tremendous economic potential of the Mexican tourism market.

In particular, U.S. investments in tourism promotion efforts in Mexico have the potential to have a significantly positive impact on the binational relationship. Simply stating that Mexican tourists are wanted and welcome in the United States is an enormous step in and of itself.

Yet this change in approach is not enough. It must be accompanied by a real effort to introduce efficiency to a significant policy and logistical challenge: granting access to visas for a growing Mexican middle class with both the desire and the financial means to visit the United States for the first time. Although the political and logistical hurdles to including Mexico in the U.S. Visa Waiver Program are significant, if we are truly serious about increasing tourism to the U.S., our next-door neighbor Mexico holds some of the greatest unrealized potential to reach this critical objective.

Finally, the land ports of entry on the U.S.-Mexico border are at or beyond capacity and are currently acting as a brake on economic development in border communities as well as the entire U.S. Southwest. Yet these ports of entry have the potential to become true economic engines, not just to process goods more efficiently, but to process our nation's "clients and guests" in a friendlier, more secure and efficient way. Individuals who have made considerable effort to apply for non-immigrant visas in order to visit the US and buy US products should not be deterred by cumbersome procedures and long waits in line.

While the U.S. Departments of Commerce and Interior are spearheading federal efforts to increase tourism, other agencies also have key roles to play. This is particularly true of the Departments of State (embassy and consulates) and Homeland Security (land ports of entry). Five key steps will go a long ways toward unlocking the tremendous economic value "hidden in plain sight" represented by a growth in Mexican arrivals.

1. **Include Mexico together with China, Brazil and India as Commerce and Interior's targets for tourism promotion.** Mexico is a large (113 million people), middle-income country with the 12th largest economy in the world. It is hosting the G-20 conference this year and is an economic powerhouse in its own right. While the country currently ranks second in terms of visits to the U.S. and has the fourth highest tourism expenditures of any country (according to 2010 statistics), more needs to be done from a strategic approach with respect to Mexico. The U.S. needs to make sure it is not unduly preventing law-abiding tourists from enjoying its

many attractions and tourism products and that visits from Mexico help to rebuild our nation's economy following the Great Recession.

2. **Actively promote the United States tourism product in Mexico.** There is an overall consensus by tourism experts that there is a latent demand for travel to the US by Mexicans. Yet while Mexico is to some degree a natural tourism market for our country, there is currently no significant and concerted effort on the part of the federal government to promote US tourism in Mexico. Promotional efforts in Mexico have historically been led by U.S. cities and states, and though Brand USA is just now getting under way, the partnership needs to move decisively and rapidly to turn Mexican tourists' attention northward in the face of stiff global competition for Mexican visitors and expenditures, mostly from the European Union.
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5. **Actively facilitate Mexican tourism environments at the land ports of entry.** As the official U.S. gateways for Mexican tourists, much more can be done to assure that Mexican tourists receive a just, efficient, and courteous welcome to the United States of America. The new Ready Lanes at our ports of entry are an excellent start, but more needs to be done to capitalize on the entire economic potential of tourism from Mexico.



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Cover image of Mather Point, South Rim, Grand Canyon. NPS photo by Grand Canyon NPS. Image of U.S.-Mexico border states courtesy of the Border Legislative Conference.