

Mexico Hospitality - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)

Market Report | 2026-01-16 | 150 pages | Mordor Intelligence

AVAILABLE LICENSES:

- Single User License \$4750.00
- Team License (1-7 Users) \$5250.00
- Site License \$6500.00
- Corporate License \$8750.00

Report description:

Mexico Hospitality Market Analysis

The Mexico Hospitality Market size in 2026 is estimated at USD 61.31 billion, growing from 2025 value of USD 57.81 billion with 2031 projections showing USD 82.22 billion, growing at 6.05% CAGR over 2026-2031.

The forecast is backed by the sector's robust rebound from the pandemic and its renewed strategic importance for regional tourism and business travel. Much of the current momentum is anchored in the dual influence of resurgent leisure demand and sustained corporate activity linked to nearshoring, a combination that diversifies revenue streams and lowers seasonality risk across the Mexico hospitality market. Macro forces reshaping the sector include Mexico's emergence as a nearshoring hub, with Nuevo Leon alone attracting USD 4 billion in foreign direct investment and creating 500,000 new jobs. This manufacturing boom extends beyond traditional industrial corridors into the Bajio region, generating sustained corporate travel demand. Simultaneously, the Maya Train's operational launch connects 34 stations across five states, fundamentally altering accessibility patterns to previously underserved archaeological and cultural sites.

Mexico Hospitality Market Trends and Insights

Tourism Inflow Rebound Post-COVID

Mexico welcomed 45 million international visitors in 2024, a 6.24% year-on-year jump that propelled receipts to USD 15 billion in

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

the first half, signalling not just volume recovery but higher visitor spends. Leisure demand from the United States remains the cornerstone, yet diversified arrivals from South America and Europe are smoothing seasonal volatility. High-end resorts reported occupancy above historic norms, an indicator that proximity, price competitiveness, and expanded airlift have structurally altered Mexico's appeal relative to Caribbean rivals. The rebound has spurred hoteliers to reopen dormant keys and accelerate refurbishment programs, especially in resort corridors. Near-term forward bookings illustrate stronger shoulder-season pacing, implying travelers now bundle beach stays with cultural circuit add-ons made possible by improved ground transport. Ancillary revenue from food and beverage to excursions has climbed because longer itineraries translate into deeper on-site spending. Overall, the surge cements a stronger baseline for the Mexico hospitality market, making growth less dependent on single-segment performance and more balanced across visitor origins and spend profiles.

Expansion of International Hotel Chains

Global operators such as Marriott, IHG, and Accor have intensified deal signings, together injecting dozens of new flags into urban nodes and coastal enclaves, a show of confidence in the long-term upside of the Mexico hospitality market. Their expansion prioritizes conversion opportunities over ground-up builds, enabling faster deployment of capital, quicker stabilization of revenues, and mitigation of permitting friction. Chains leverage sophisticated loyalty programs to redirect global members into Mexican properties, instantly boosting base occupancy and ancillary revenue capture. RevPAR growth of 5% in Q4 2024 for Marriott Mexico assets underscores the financial logic. The influx of international brand standards is raising guest expectations, nudging independents toward soft-branding or alliance models to stay competitive. Talent pipelines are also affected, with chains implementing corporate training academies that gradually elevate service consistency across the Mexico hospitality industry. Over the medium term, the branded cohort is likely to consolidate fragmented ownership structures, steadily edging up its share of the Mexico hospitality market size and amplifying discipline across asset management practices.

Macroeconomic Volatility & Inflation

Peso appreciation compresses margins for operators incurring dollar-denominated costs yet earning peso revenues, a mismatch that challenges pricing strategies aimed at international guests. Construction inputs cement, steel, and finishing materials, have escalated 14% year-on-year, stalling some pipeline projects or forcing scope reductions. Financing costs climb in tandem with policy-rate hikes, creating more stringent hurdle rates for developers. On the consumer side, inflation squeezes domestic discretionary income, tempering weekend getaway volume among middle-income households. Hotels offset cost pressure through dynamic pricing algorithms, energy-efficiency retrofits, and supplier contract renegotiations, but independents lacking scale face limited hedging capacity. Currency volatility also complicates budgeting for international marketing campaigns pegged in USD, prompting cautious spending. Consequently, macroeconomic swings shave near-term growth from the Mexico hospitality market, particularly for economy properties tethered to price-sensitive segments.

Other drivers and restraints analyzed in the detailed report include:

Government Investment in Airport Infrastructure
Growth of Digital-Nomad Segment via New Visa Rules
Security Concerns in Selected Tourist Corridors

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

Chain hotels held 60.12% of value in 2025 and are projected to grow at 7.98% CAGR, ensuring their slice of the Mexico hospitality market size widens as foreign brands court both leisure and corporate demand. Their expansion strategy leans heavily on conversions, leveraging capital-light management agreements to secure inventory quickly and sidestep permitting delays. Loyalty

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

ecosystems funnel international guests into Mexican resorts, lifting shoulder-season occupancy and smoothing revenue. Independent operators, by contrast, confront escalating technology investment requirements, digital check-in, omnichannel distribution, and AI-driven revenue management that erode margins without scale. Many independents now explore soft-brand affiliations to retain ownership yet gain platform advantages. Bank lenders perceive branded assets as lower risk, granting preferential financing terms that further tilt the playing field. As consolidation advances, the Mexico hospitality market share held by branded operators should climb beyond 65.10% within five years, narrowing the scope for pure independents but expanding opportunities for joint-venture asset management specialists.

The migration toward branding also reshapes labor markets, as international chains import standardized training programs that lift service consistency and talent mobility across regions. Corporate travel managers increasingly stipulate brand-level safety protocols and loyalty benefits as prerequisites for preferred hotel status, steering RFP volume toward chains. On the cost side, central procurement and global distribution agreements compress per-unit expenses below what stand-alone hotels can secure. Technology partnerships with big-tech providers offer experimental capabilities predictive maintenance, digital concierge that smaller entities cannot feasibly pilot.

The Mexico Hospitality Market Report is Segmented by Type (Chain Hotels, Independent Hotels), Accommodation Class (Luxury, Mid & Upper-Mid-Scale, Budget & Economy, Service Apartments), Booking Channel (Direct Digital, Otas, Corporate/MICE, Wholesale & Traditional Agents), and Geography (Northwest, Northern Border, Central, Mexico City Metro, Bajio-Pacific Coast, and Other). The Market Forecasts are Provided in Terms of Value (USD).

List of Companies Covered in this Report:

Grupo Posadas Marriott International Hilton Worldwide Grupo Real Turismo AccorHotels Hyatt Hotels Corporation IHG Hotels & Resorts Wyndham Hotels & Resorts Grupo Presidente City Express Hotels (FibraHotel) Grupo Hotelero Santa Fe Grupo Brisas Barcelo Hotel Group AMResorts (Apple Leisure Group) RCD Hotels Palladium Hotel Group Selina Hospitality OYO Hotels Mexico Hoteles Mision Best Western Hotels & Resorts

Additional Benefits:

The market estimate (ME) sheet in Excel format
3 months of analyst support

Table of Contents:

- 1 Introduction
 - 1.1 Study Assumptions & Market Definition
 - 1.2 Scope of the Study
- 2 Research Methodology
- 3 Executive Summary
- 4 Market Landscape
 - 4.1 Market Overview
 - 4.2 Market Drivers
 - 4.2.1 Tourism inflow rebound post-COVID
 - 4.2.2 Expansion of international hotel chains
 - 4.2.3 Government investment in airport infrastructure

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 4.2.4 Increasing domestic business travel
- 4.2.5 Growth of digital-nomad segment via new visa rules
- 4.2.6 Rise of heritage boutique hotels in Pueblos Magicos
- 4.3 Market Restraints
 - 4.3.1 Macroeconomic volatility & inflation
 - 4.3.2 Security concerns in selected tourist corridors
 - 4.3.3 High development costs & permitting hurdles
 - 4.3.4 Coastal water-scarcity regulations on new builds
- 4.4 Value / Supply-Chain Analysis
- 4.5 Regulatory Landscape
- 4.6 Technological Outlook
- 4.7 Porter's Five Forces
 - 4.7.1 Threat of New Entrants
 - 4.7.2 Bargaining Power of Suppliers
 - 4.7.3 Bargaining Power of Buyers
 - 4.7.4 Threat of Substitutes
 - 4.7.5 Industry Rivalry

5 Market Size & Growth Forecasts

- 5.1 By Type
 - 5.1.1 Chain Hotels
 - 5.1.2 Independent Hotels
- 5.2 By Accommodation Class
 - 5.2.1 Luxury
 - 5.2.2 Mid & Upper-Mid-scale
 - 5.2.3 Budget & Economy
 - 5.2.4 Service Apartments
- 5.3 By Booking Channel
 - 5.3.1 Direct Digital
 - 5.3.2 OTAs
 - 5.3.3 Corporate / MICE
 - 5.3.4 Wholesale & Traditional Agents
- 5.4 By Geographic Region
 - 5.4.1 Northwest
 - 5.4.2 Northern Border
 - 5.4.3 Central
 - 5.4.4 Mexico City Metro
 - 5.4.5 Bajio-Pacific Coast
 - 5.4.6 Southern
 - 5.4.7 Yucatan Peninsula & Caribbean

6 Competitive Landscape

- 6.1 Market Concentration
- 6.2 Strategic Moves
- 6.3 Market Share Analysis
- 6.4 Company Profiles (includes Global level Overview, Market level overview, Core Segments, Financials as available, Strategic Information, Market Rank/Share for key companies, Products & Services, and Recent Developments)

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 6.4.1 Grupo Posadas
- 6.4.2 Marriott International
- 6.4.3 Hilton Worldwide
- 6.4.4 Grupo Real Turismo
- 6.4.5 AccorHotels
- 6.4.6 Hyatt Hotels Corporation
- 6.4.7 IHG Hotels & Resorts
- 6.4.8 Wyndham Hotels & Resorts
- 6.4.9 Grupo Presidente
- 6.4.10 City Express Hotels (FibraHotel)
- 6.4.11 Grupo Hotelero Santa Fe
- 6.4.12 Grupo Brisas
- 6.4.13 Barcelo Hotel Group
- 6.4.14 AMResorts (Apple Leisure Group)
- 6.4.15 RCD Hotels
- 6.4.16 Palladium Hotel Group
- 6.4.17 Selina Hospitality
- 6.4.18 OYO Hotels Mexico
- 6.4.19 Hoteles Mision
- 6.4.20 Best Western Hotels & Resorts

7 Market Opportunities & Future Outlook

- 7.1 ESG-certified eco-resorts in under-served Pacific coast towns
- 7.2 Mid-scale branded serviced apartments for long-stay digital nomads

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Mexico Hospitality - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)

Market Report | 2026-01-16 | 150 pages | Mordor Intelligence

To place an Order with Scotts International:

- Print this form
- Complete the relevant blank fields and sign
- Send as a scanned email to support@scott's-international.com

ORDER FORM:

Select license	License	Price
	Single User License	\$4750.00
	Team License (1-7 Users)	\$5250.00
	Site License	\$6500.00
	Corporate License	\$8750.00
		VAT
		Total

*Please circle the relevant license option. For any questions please contact support@scott's-international.com or 0048 603 394 346.

** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	<input type="text" value="2026-02-27"/>
		Signature	

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scott's-international.com

www.scott's-international.com

